

WORKPLACE SURVEY REPORT 2021



INTRODUCTION

Following the sudden and rapid acceleration of remote working due to the Covid-19 pandemic, businesses have been forced to re-evaluate their workplaces.

As a business committed to delivering exceptional workplace experiences, being at the forefront of workplace trends and innovations ensures that we can continue to deliver a high-quality service for our clients and remain ahead of the curve in the industry.

In September we sent a survey to over 4,000 industry professionals in the corporate real estate (CRE) sector to understand how the pandemic has impacted their workplaces and continues to influence change across their property portfolios.

The findings highlight key challenges and themes across corporate real estate, identifying opportunities for transformation and innovation.

This is the first survey Mace has carried out on workplace trends, as a response to the dramatic shift seen across the industry in the last year.

Thank you to everyone who took part. Your feedback has generated a fascinating insight into the opportunities and pain points experienced by workplace professionals, and what lies ahead for the world of workplace.

Key findings

- Three quarters of respondents intend to make upgrades to their workplaces in the next two years.
- Employee experience is considered the number one priority for 60% of CRE leaders.
- Nearly two thirds (62%) of respondents have revised their workplace strategy due to the coronavirus pandemic.
- 46% of companies anticipate that employees will be in the office for two or more days in the future.

THE RESULTS: WORKPLACE EXPERIENCE

There is no doubt that the workplace has been a huge focus for businesses in 2020 and 2021.

No one could have predicted that 18 months after workplaces were recommended to close, employees would largely still be working from home, or at the very least, spending less time in the office.

Concern for employees' continued wellbeing, experience and productivity has been well-documented in both industry and mainstream news.

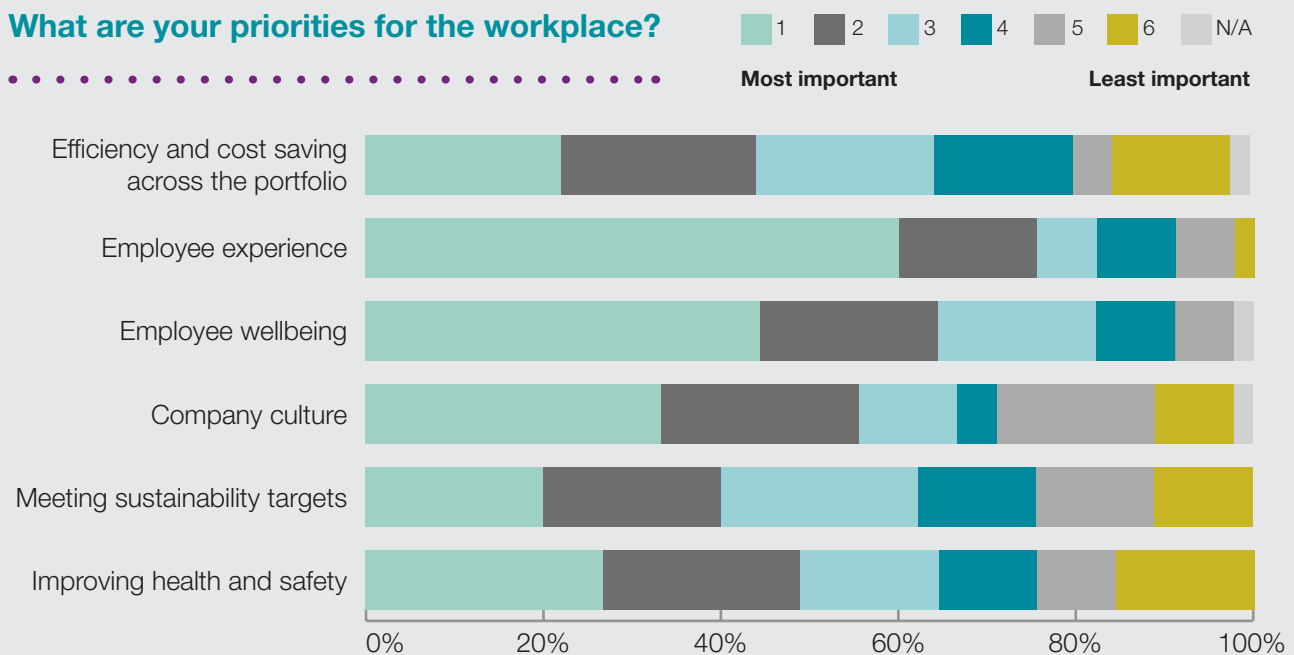
Fears around presenteeism during remote working and the 'always-on' culture have led to initiatives to support a better work-life balance from both employees and businesses.

From our findings, it is clear that employee experience and wellbeing are the main concerns for CRE leaders, with 60% stating that employee experience is their number one priority for the workplace.

60%

of CRE leaders said employee experience is their number one priority for the workplace.

What are your priorities for the workplace?



Workplace challenges

Recognising the significant changes that CRE leaders have had to consider in the last 18 months, we additionally looked at the key challenges facing the workplace.

For 56% of respondents, improving the workplace experience is currently their main challenge, followed by meeting sustainability targets and reducing carbon emissions (16%).

This is a significant change from before the pandemic when 'optimising operations across the portfolio' ranked highest (29%), and improving the workplace experience was the priority for just 27%.

WORKPLACE DESIGNS WILL BE UPGRADED

As the pandemic has continued on longer than anyone might have anticipated, making costly changes to workplaces without a clear understanding of what companies and employees need hasn't made good business sense.

Some organisations have chosen to compromise, making small design changes within the existing office layout to accommodate more flexible working. But with no real data to go on, many others have waited.

Now though, with knowledge of what the future might look like, nearly 60% of survey respondents reported they would be making changes to workplace design in the next 12-24 months, with 28% of CRE leaders suggesting they will update the whole portfolio within that time.

Nearly

60%

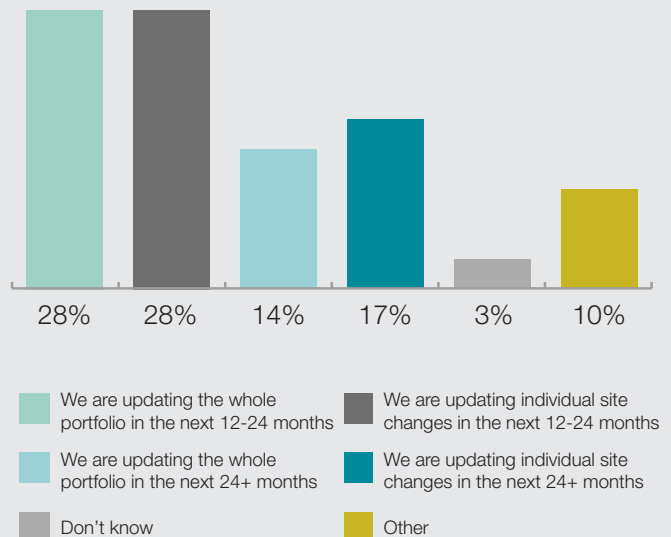
of CRE leaders plan to change their workplace design in 12-24 months.

As more employees transition from full remote working to a hybrid model, employers have recognised that their workspace options require some upgrades, with two thirds (66%) of respondents sharing that they will update their workspaces from mostly assigned desks.

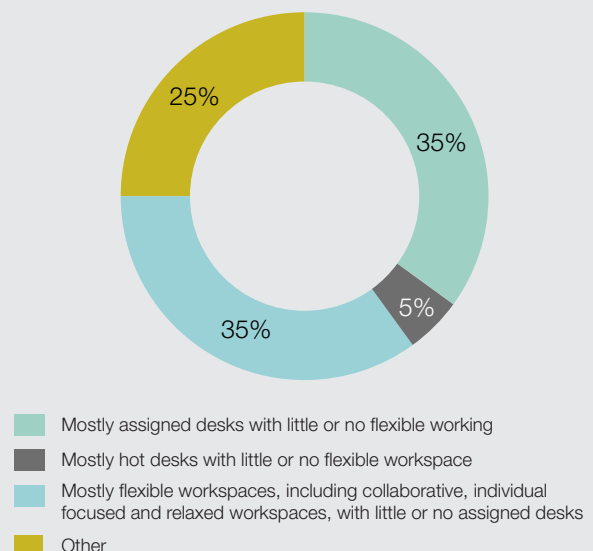
The data demonstrated that most companies fell into one of two categories when asked about their current workplace design. The two most popular responses were 'mostly assigned desks with little to no flexible working' or 'mostly flexible workspaces, with little or no assigned desks', with each choice reflecting 35% of respondents.

The real difference was between companies in Europe and the Americas. In the Americas the data showed that 66% of businesses are still using assigned desks for employees, compared with 34% of companies in Europe.

Will you update the workplace design across individual sites or the whole portfolio?



How would you describe your current workplace design?



HYBRID WORKING IS THE SOLUTION OF CHOICE

It is of no surprise that sentiments have changed towards the workplace itself. When asked about their employee working habits, 48% of businesses reported that their employees had been fully office based before the pandemic.

When asked about where they envisaged their employees spending their time in the future, only 2% of CRE leaders indicated their employees would only work in the office, with 47% of businesses suggesting employees will be in the office for two or more days.

40%
of CRE leaders intend to offer workplace services to remote workers.

This is a significant change from the 4% of businesses who had reported they were already splitting their time before the pandemic.

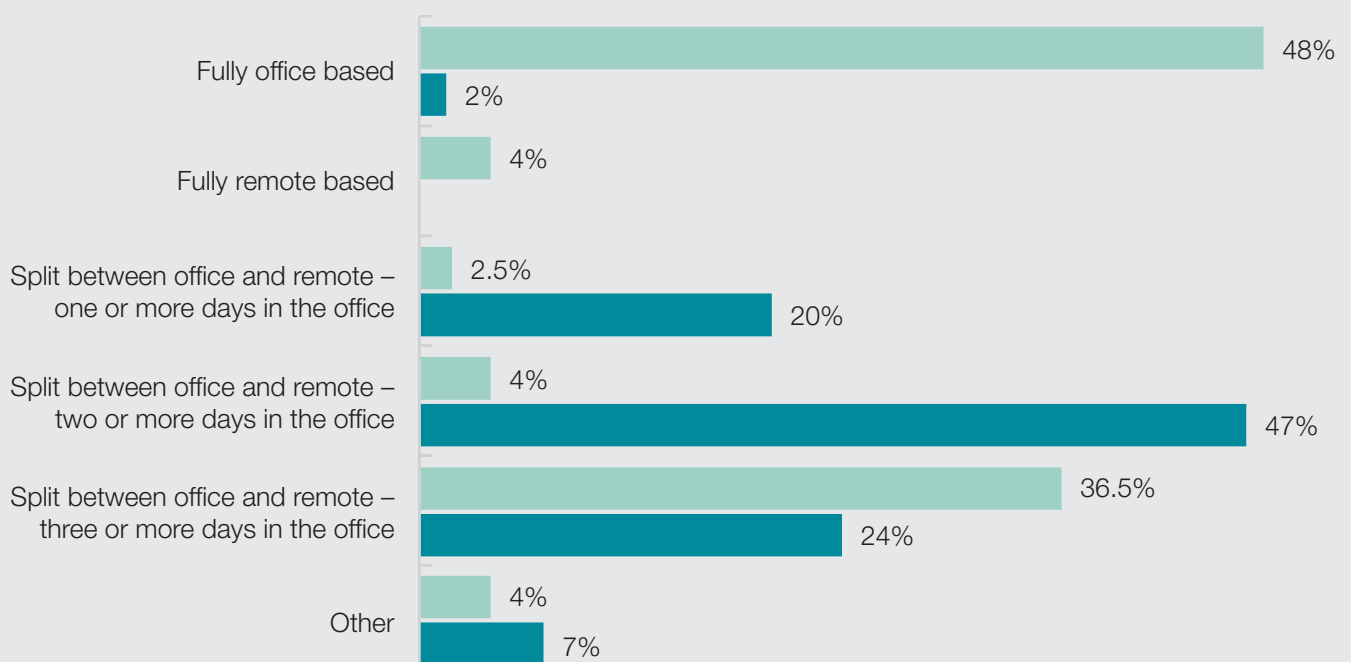
In terms of offering extra services to support the workplace experience for those working remotely, there are mixed feelings about whether this should be part of the employee offer.

With employees starting to return to the office in some capacity, only 40% of CRE leaders said they intended to offer workplace services to remote workers, with 33% of respondents still undecided whether this would form part of their future workplace strategy.

When asked about the services they were considering, the most common responses were helpdesk support, furniture provision and home display screen equipment (DSE) assessments. Of all the respondents asked, none indicated that they would plan to offer catering services to remote workers.

How would you describe your current workplace design?

Before Covid-19 After Covid-19



PORTFOLIOS ARE SET TO SHRINK

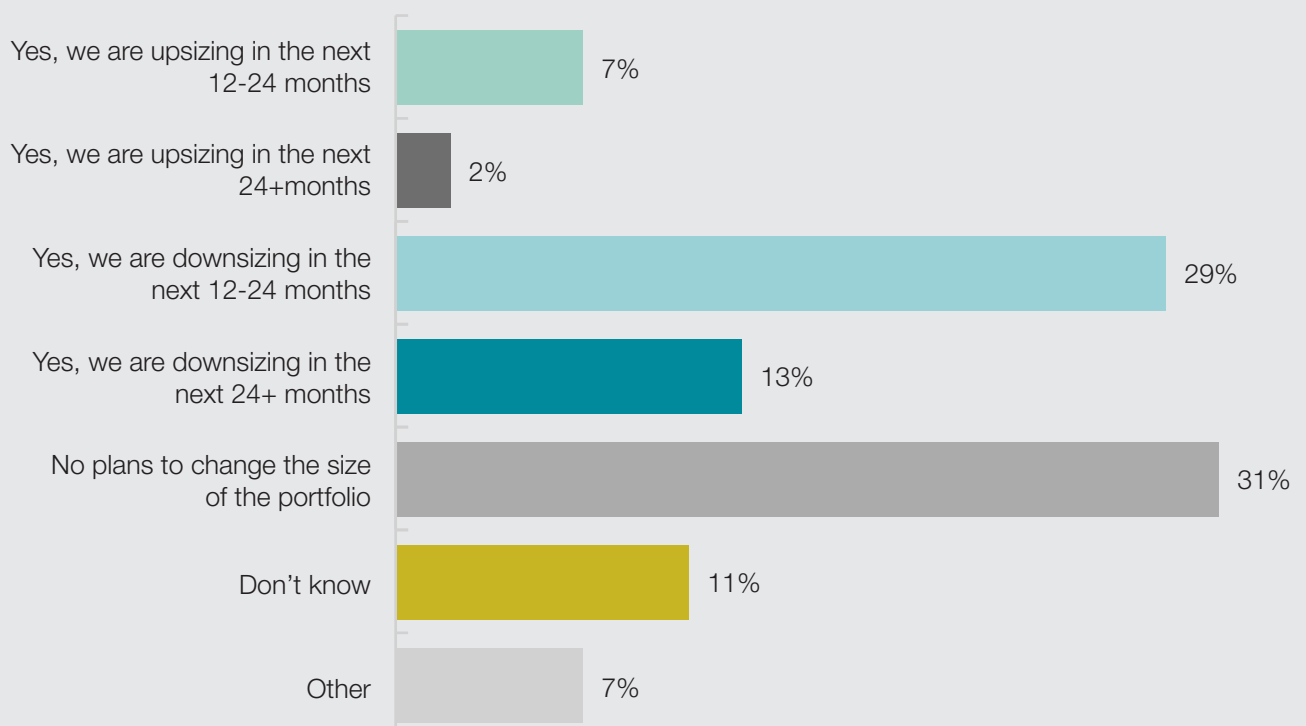
The question of what to do with corporate real estate and when to make changes has been a constant struggle. Fluctuating changes to guidance from governments has stopped business leaders from being able to commit to one solution, leaving many businesses and employees in limbo.

Now that safety risks are lower and ways of working have become more settled, companies are developing their strategies with clear objectives in mind.

With regards to the size of the portfolio, 31% of respondents have no plans to change the number of sites, versus 29% who intend to downsize in the next 12-24 months. In the Americas, downsizing was a clear objective, with over 57% of CRE leaders with multiple sites within one or more region stating that their business will be reducing its footprint.

57%
of businesses in the Americas plan to reduce their global portfolios.

Will you consider making changes to the size of your current portfolio?



TECHNOLOGY HAS A KEY ROLE TO PLAY

The use of technology solutions and innovations has been growing as businesses across the globe look to optimise their operations and make the working day more efficient.

As CRE leaders and workplace teams rely more on data to drive decision making for the workplace, sensor technology and building management systems are playing a much bigger role in daily operations.

Our survey showed that room and desk booking software were the most popular choices in terms of new technology implemented in the last six months, as indicated by 68% and 64% of respondents respectively.

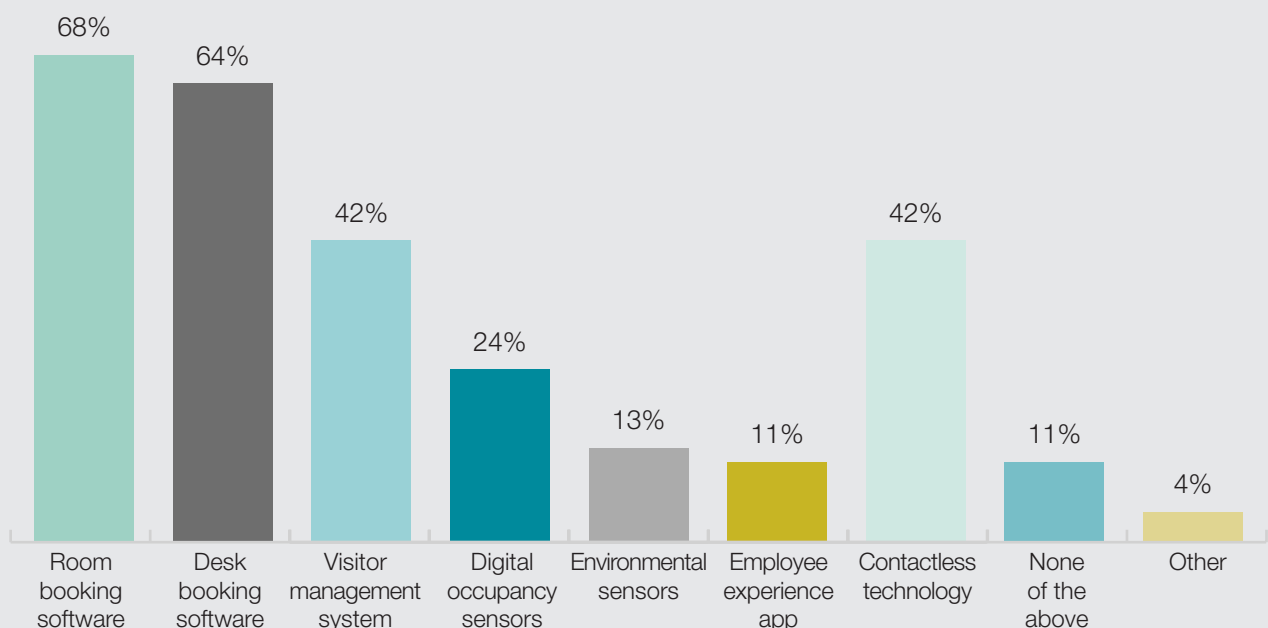
The data from these technologies has become a key tool in recent years for CRE leaders, with three out of five respondents saying they currently use data to improve the workplace experience for employees generally.

Over the next six months, respondents indicated that they would be using data in their operations, with a view to gaining a better understanding of space utilisation and occupancy figures (40%), with a significant number (44%) intending to make use of data to reduce energy consumption and support sustainability.

68%

of businesses have implemented room booking software technologies in the last six months.

In the last six months have you implemented any of the following technology solutions across your workplace(s)?



SURVEYS ARE AN ESSENTIAL TOOL FOR CHANGE

Surveys have proven to be essential tools in gathering feedback from employees for some time, and this has been amplified in the last 12 months.

Our data reinforced this, with 71% of respondents stating that they had run surveys for their own employees, 65% of which designed their survey in-house.

Here are some of the initiatives CRE leaders have implemented as a result of the employee feedback:

- We've used employee feedback to influence a 'Smart Working' strategy.
- We've improved employee wellbeing and engagement, in addition to the workplace experience.
- From the feedback given we've focused on creating collaborative environments.
- We're planning to return to office working and implementing smart working solutions.
- We've implemented flexible working, introduced additional wellbeing and welfare provisions, implemented sensor technology, and introduced visitor management QR codes.
- We've improved ways of working, designed a collaborative workplace and removed the requirement to work in the office.
- We're adapting spaces to suit the new workstyles, which typically involves 2/3 days in the office. We've also reduced dedicated desking and increased collaboration space.
- The surveys helped to design our flexible ways of working and policies, and we used the feedback to update our property and workplace strategy.
- We've introduced more flexible and hybrid working methods as well as more collaboration spaces to encourage staff back to the office.

71%

of businesses have run employee surveys on the workplace in the last 12 months.



ABOUT MACE

.....

At Mace, we understand the true value of the workplace, the impact it has on business objectives and the role it plays in supporting a healthy workforce.

.....

Mace is an international construction, consultancy and facilities management business. We know that organisations have been challenged by Covid-19 and as we all look to define a new normal in the workplace, we will collaborate with clients to find the right solutions for their business and their people, to create the right spaces for you.

We have been on the workplace journey for many years and can bring our own experience, as well as that of our clients in different sectors and geographies, to ensure we develop the right approach for every portfolio.

Our strength is in the depth and breadth of our experience and the expertise our people bring to projects. Working across sectors, industries and geographies, the diversity of talent in our team makes for better delivery and enhanced outcomes for our clients.



To make an enquiry, please contact:

Ross Abbate
CEO for Operate
ross.abbate@macegroup.com

Sonya Verny
Global Head of Business Development
sonya.verny@macegroup.com

