Workplaces That Work
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– How many have surveyed staff?
– How many have used the data to inform your work-from-home policy?
– How many have established a return to work policy?
– How many are enforcing that policy?
**Where We Are Today**

Return Mandates in the minority

- Strategies to influence employees’ return to the office is split between being company vs. employee led.
- Majority of occupiers are expected to return to the office by H2 2022.
- There is a positive correlation between return guidance and return timeline.

**Return to Office Guidance Strategies**

<table>
<thead>
<tr>
<th></th>
<th>Required</th>
<th>Voluntary</th>
<th>Varies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already Underway</td>
<td>60%</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>Q2 2022</td>
<td>16%</td>
<td>30%</td>
<td>21%</td>
</tr>
<tr>
<td>H2 2022</td>
<td>16%</td>
<td>17%</td>
<td>8%</td>
</tr>
<tr>
<td>Employee Discretion</td>
<td>17%</td>
<td>21%</td>
<td>9%</td>
</tr>
<tr>
<td>Uncertain</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Where We Are Today

Return to office updates from across various industries

## Financial Services

**In-Office:** Requiring employees to return to the office.

**Incentive:** Base compensation increase.

## Technology

**Google**

**Hybrid:** Requiring employees to at least 3 days per week in the office based on employee choice.

**Incentive:** Location switch, remote petition & transportation

**Apple**

**Hybrid:** Requiring employees to work in-person on Mondays, Tuesdays and Thursdays.

**Incentive:** Transportation

**airbnb**

**Remote:** Live and work anywhere.

**Incentive:** Quarterly off-site, company-wide time zone, universal base pay

## Nonprofits

**Confidential 1**

**Hybrid:** Requiring employees to come to the office at least 3 days per week based on employee choice.

**Confidential 2**

**Hybrid:** 8 days a month need to be in the office, dedicated spaces for staff. Employees choice on what days to come in.

**Confidential 3**

**Hybrid:** Employee choice ~3 days a week, dedicated space. 2 days or less shared environment.
Where We Are Today

Asymmetry Among Peers
Informed opinions on hybrid work vary among like-type companies and within predictably consistent industries

Delayed Office Return
Voluntary RTO remains the go-to solution while organizations monitor pandemic levels across portfolios

Workforce Distribution
New migration patterns and tight labor markets are causing companies to think more broadly about location

Flight to Quality
New leases are outpacing renewals for the first time since Q3 2019
Hybrid Work Overview

**Office First**
- Little/No Remote Work
  - The office is the default work location for all employees with limited ad-hoc remote work
  - My work happens in the office

**Company Core Days**
- The company defines assigned days for all employees to come into the office
  - I come in on specific days

**Team Core Days**
- Core days are established at the team or manager level
  - I have a routine in place with my team

**Individual Choice**
- No core days are established, and teams and individuals come in as needed for their day or schedule
  - I have control over when I come in

**Remote First**
- Remote working is considered the default way of working
  - I can live and work anywhere

**Fully In Person**
- Remote workers have complete location independence

**Fully Remote**
- Remote workers have complete location independence
Staff Engagement
Workplace Research

Research
Collect and analyze qualitative and quantitative data to inform meaningful insights and develop a business and emotional case for change.

Example activities:
– Survey/interviews
– Focus groups
– Leadership visioning
– Utilization studies

VISIONING ACTIVITIES
DEFINE PRIORITIES

Soft Measures
Subjective Data Points

EMPLOYEE ENGAGEMENT
Adoption of Flexible Work Options
Variety of Work Settings
Improved Recruitment Wellbeing
Improved Recruitment/Retention
Employee Engagement

BUSINESS PROCESS
Workflow Optimization
Improved Collaboration
Brand Recognition & Awareness
Increased Product Development
Elevated Client Experience

Increased Space Efficiency
Churn Cost Reduction
OpEx Reduction
Reduction in Lease Costs
Minimized Business Disruption

EXPENSE MANAGEMENT
Construction Avoided
WELL Certification
LEED Certification
Carbon Footprint Reduction
Corporate Responsibility Awareness

ENVIRONMENTAL EFFICIENCY
Objective Data Points
Hard Measures
Fundamentally, there has to be a ‘why’.

CBRE Global Workplace Solutions Client
The most important employee amenity in the return to the office is other employees.

Lenny Beaudoin
Executive Managing Director, CBRE Workplace, Design & Occupancy
In a post-COVID world, what are the primary reasons you would come to the office?

- For team connection and community: 65%
- To collaborate face-to-face: 53%
- For access to tools, technology or spaces: 36%
- For physical boundaries between work and home: 23%

Future of Work: Workforce Sentiment Survey 2022
Flexibility & Adaptibility

Re-evaluate expectations for occupancy & prepare for lower utilization trends

Average Show Up Rates

70% pre-COVID average
30-50% potential post-COVID average

Sources: CBRE Workplace, 20 clients across 7 industries, 40,000+ individuals (2017-2019)
Flexibility & Adaptability

50% Average Space Utilization Does Not (Always) Equal 50% Space Reduction

Hybrid Workstyle
Sharing Ratios

Sharing ratios are calculated using projected average show-up rate and standard deviation, providing enough desks to accommodate employees on peak attendance days.
Leaning into Technology

Organizations are showing greater interest in blending the physical and virtual worlds to create affiliation between employees regardless of location.

Which of the following CRE technologies are you pursuing or considering for the future steady state?

<table>
<thead>
<tr>
<th>CRE Technology Adoption</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced Video Conferencing</td>
<td>76%</td>
</tr>
<tr>
<td>Occupancy Sensors</td>
<td>53%</td>
</tr>
<tr>
<td>Smart Building Sensors</td>
<td>48%</td>
</tr>
<tr>
<td>Employee Experience App</td>
<td>45%</td>
</tr>
<tr>
<td>Touchless Technology</td>
<td>42%</td>
</tr>
<tr>
<td>Air Quality Sensors</td>
<td>37%</td>
</tr>
</tbody>
</table>

Note: % of respondents that ranked each category as a top-three technology priority.
Thank You.