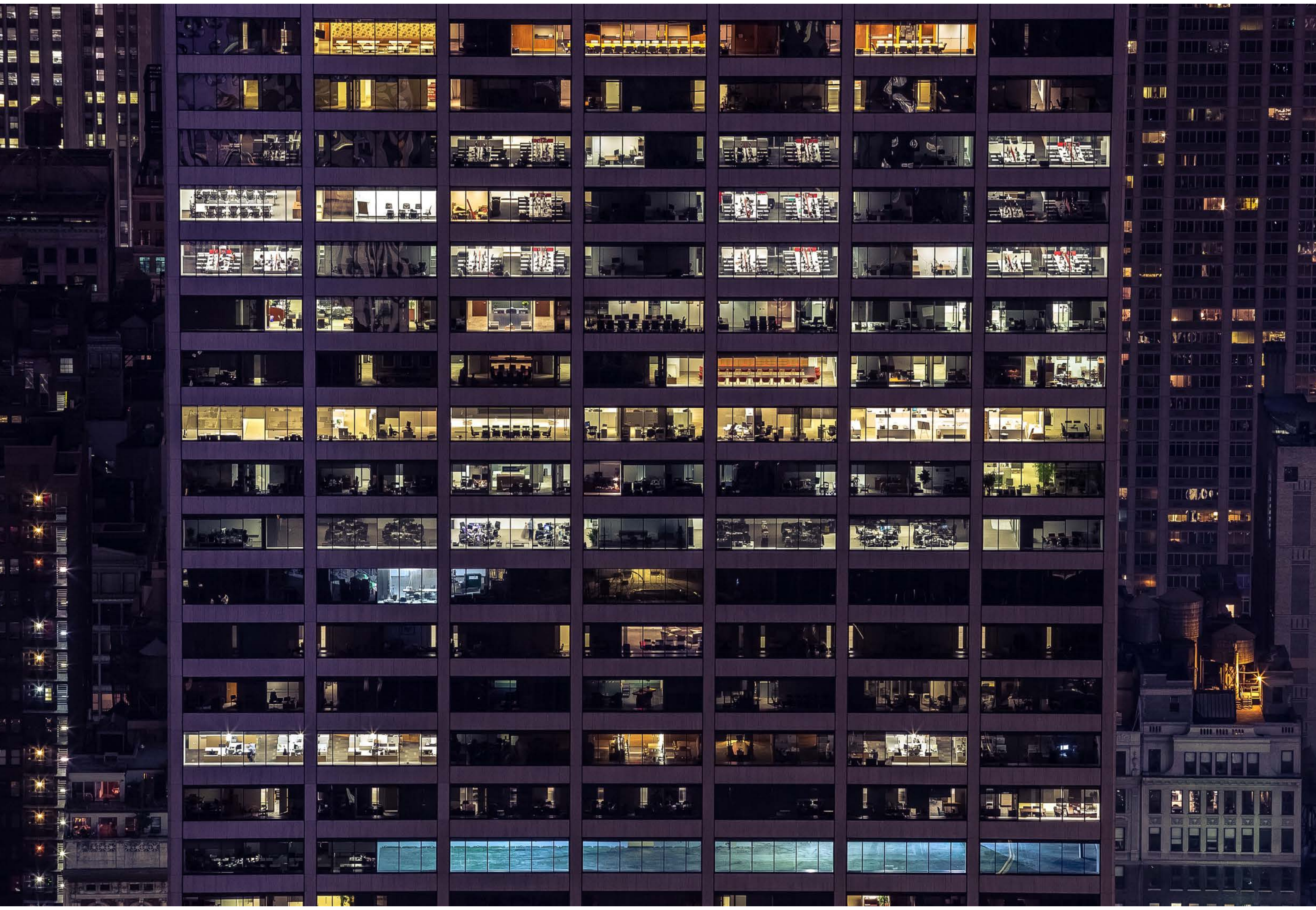
SAVILLS
OFFICE FiT

Adapt, Evolve, Improve



SURVEY RESULTS: ONE YEAR ON

Balancing business needs and employee preferences

INTRODUCTION

Last year we launched Savills Office FiT to provide our clients with practical insights and design-led advice from our global experts as owners and occupiers adapt, evolve and improve their workplaces in response to the Covid-19 pandemic.

Now, one year on, we explore how views and preferences have changed over time.

We have analysed a representative response from a survey of over 100,000 owner and occupier clients and office workers across the UK and EMEA. In addition to our own UK and EMEA client survey, we also utilised the global polling organisation YouGov to ensure a balanced response by age, gender and business sector.

Within this report we have posed and answered a number of important questions around future sentiment and demand for the office; implications the pandemic has had on residential markets; preferences around how much and which days workers currently plan to be in the office and the factors we now consider to be important in future office design.

As the UK and Europe navigate through the tail end of the pandemic, governments are now starting to change their guidance from 'work from home where you can' to 'get back to the office'.

What is clear is that the office remains vital, not only for corporate culture and success, but it will also play a huge role in the recovery, offering normality and reconnection. Home and remote working will continue, however, office life post pandemic is likely to broadly resume as before, with enhancements and benefits designed to improve the office experience.

Balancing business needs and employee preferences is now the focus and whilst there is a perception that these two aspirations are different, our survey indicates a broadly consistent response between managerial and non-managerial employees. Ultimately, effective communication between employer and employee is essential as organisations return to their offices and manage the change.

WHAT HAS CHANGED ONE YEAR ON?

A quick comparison of how attitudes and perceptions have changed since our first survey results, issued in June 2020.

Prefer a city centre office location

2020: 40% 2021: 52%

The office best facilitates mental health

2020: 18% 2021: 28%

Productivity is higher when working remotely

2020: 48% 2021: 40%

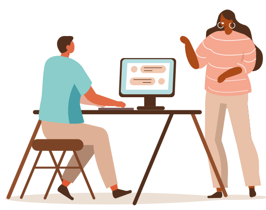
Colleague collaboration is best facilitated from the office

2020: 61% 2021: 63%

The ability to concentrate is best facilitated from the office

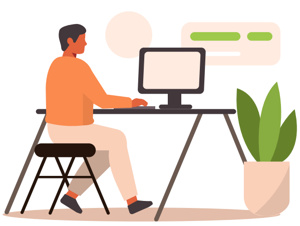
2020: 16% 2021: 25%

Happy to use a shared desk in the office



2020: 66% 2021: 55%

Would work from flexible offices in the future



2020: 3% 2021: 12%

Would work from client offices in the future

2020: 10% 2021: 19%

The pandemic will influence future home location (25-34 year olds)

2020: 62% 2021: 40%

KEY TAKEAWAYS

WHAT IS THE CURRENT SENTIMENT AROUND THE OFFICE ?

- The office is important, but equally so is its configuration.
- Working from home can be a positive component of the work-life mosaic, but the workplace is an essential environment for employee growth and learning.
- Those in leadership positions place slightly more importance on the office than those who are not.
- Employee preferences must be balanced with business demands.

HOW WILL THE DEMAND FOR OFFICE SPACE CHANGE?

- Alternative work locations have gained greater attention.
- We are seeing a growing interest in a ‘hub & roam’ model.
- External flexible workplaces are a valuable component for businesses in the future.
- We expect natural caution regarding flex space initially as a shared facility.

WILL THE PANDEMIC INFLUENCE FUTURE RESIDENTIAL PREFERENCES?

- The pandemic has clearly resulted in people considering their home location and size.
- For city dwellers lockdown will have highlighted the benefits of personal outdoor space.
- The concept of living in an area with open space and less congestion may help manage the transition out of the pandemic.
- In 2020 62% of survey respondents, in the 25-34 age group, said that the pandemic would influence their future home location. This has fallen by a third to 40% in 2021.

HOW MUCH AND HOW OFTEN WILL THE WORKFORCE BE IN THE OFFICE?

- Occupiers’ concerns around managing office use range from under-populated workspaces to managing peaks in the office on more favoured days.
- Monitoring and measuring new working patterns will be important to adapting the workplace.
- Flexibility will increase the attractiveness of the workplace for employees.
- The key is to make space simple to adapt and change.

HOW DO WORKPLACES NEED TO ADAPT?

- Many people have become used to controlling their working environment at home and will need to relearn working alongside others.
- Acoustic control has become extremely important.
- We should consider repurposing and refurbishing older buildings.
- An enriched environment which engages the five senses can increase both productivity and user wellbeing

HOW CAN WE ACHIEVE A BALANCED PHYSICAL-DIGITAL ECOSYSTEM?

- Smarter spaces are not just about technology.
- To assist in managing new protocols, an intelligent space management app is key.
- Technology can support a smarter environment by monitoring temperature, air quality, noise and energy consumption, as well as providing feedback to facilities management teams.
- Workers consider good quality Wi-Fi and mobile signal to be the most important factors when creating the ideal office.

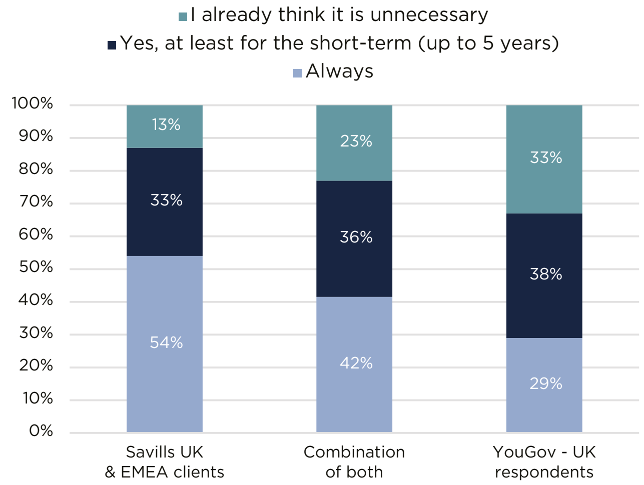
WHAT ARE OUR NEW HEALTH AND WELLBEING PRIORITIES?

- The importance of health & wellbeing of staff has naturally increased.
- Desk sharing will become commonplace in an agile workplace.
- People’s perception of a shared desk typically assumes that desks are shared over a single day.
- Increased demand is being seen for more open, green space.

1. WHAT IS THE CURRENT SENTIMENT AROUND THE OFFICE?

The key questions being debated are how workers feel about the return to the office and where specific tasks are best undertaken. Businesses are paying close attention to government advice and will have to determine how they want their employees to work and what remote working means for them.

87% of EMEA survey respondents believe the office remains essential for successful business operations post pandemic, in line with the 89% recorded at the start of the pandemic, suggesting attitudes towards the office have remained broadly consistent over the last 12 months.



Source: Savills Office FiT

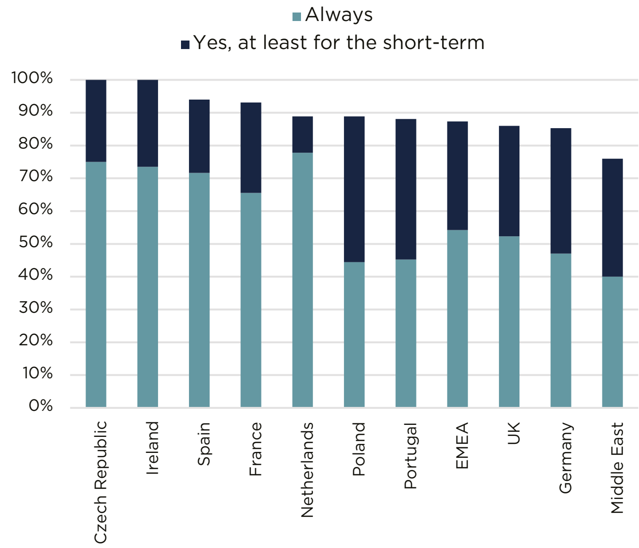
87%

still believe the physical office will remain essential (Compared to 89% in 2020)

EMEA PERSPECTIVE

In Southern, Central and Eastern European markets, workers tend to have a stronger preference for the office. Prior to the pandemic, only a relatively low proportion of workers reported that they were able to work remotely, including Czech Republic and Spain, whereas this practice was already relatively prominent in the UK. Nevertheless, 85% of UK respondents still reported that the office would remain important post pandemic.

EMEA: Do you think office space is still a necessity for a company to operate successfully?

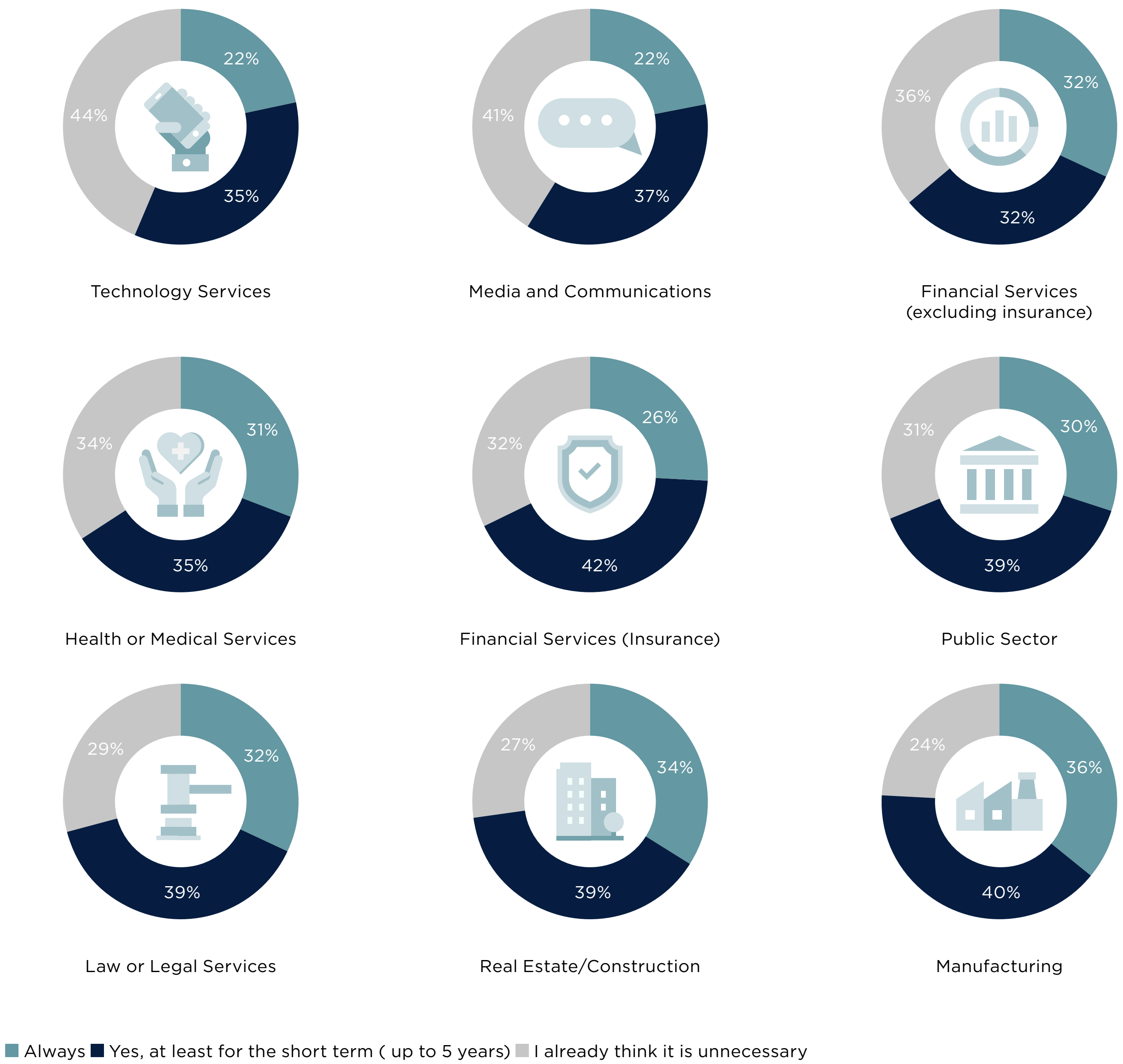


Source: Savills Office FiT

Employers will however need to manage new working preferences. For example, 54% of respondents feel that their mental health is best fulfilled by working from a combination of both the home and the office. Similarly, 48% of respondents feel that their personal growth is best facilitated by working from a combination of both.

1. WHAT IS THE CURRENT SENTIMENT AROUND THE OFFICE?

UK: Do you think office space is still a necessity for a company to operate successfully?



1. WHAT IS THE CURRENT SENTIMENT AROUND THE OFFICE?

EMPLOYER/EMPLOYEE ATTITUDES TO THE IMPORTANCE OF THE WORKPLACE

69% of senior management compared with 63% of non-managerial employees consider the workplace to be important after the pandemic, which may reflect the importance of face-to-face interaction for businesses to operate successfully.

There is however, a clear difference in opinion between industry sectors regarding the necessity of a physical office space, with tech, media and financial sectors regarding it as the least necessary. This is not an unexpected result from the tech sector, which historically has been the most mobile and technically enabled to work from anywhere.

Around 40% of the respondents feel either slightly or a lot more productive at home, down from 48% a year ago. This debate has raged on during the past year. However, what we found from our survey was that 40% of respondents were working 1+ additional hours per day during lockdown, in line with our previous survey. There will be certain tasks that are suited to home working and require more concentration and minimal distractions, but the office is preferred in terms of providing opportunities for collaboration and all the benefits that this brings.

40%

feel more productive at home (Compared to 48% in 2020)

KEY TAKEAWAYS

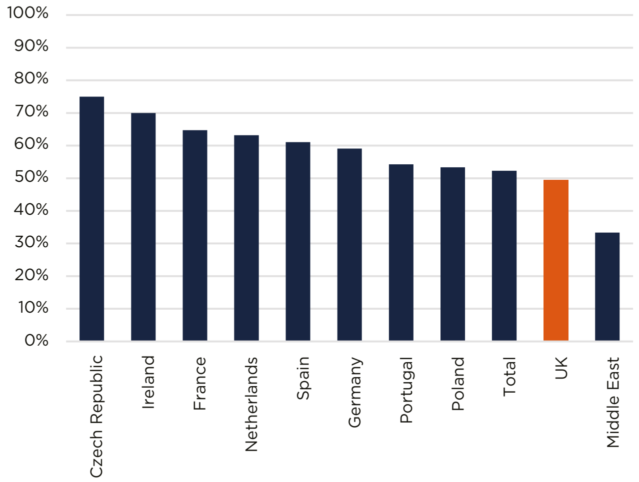
- **The office is important, but equally so is its configuration.** Additional work settings, collaborative spaces and virtual communications must all be taken into account with appropriate space allocation.
- **Working from home can be a positive component of the work-life mosaic,** but the workplace is an essential environment for employee growth and learning. The workplace is key to support and maintain the culture, community and an organisation's brand.
- **Those in leadership positions place slightly more importance on the office than those who are not.** Real estate is vital to support overall business strategy. The leadership rationale for decisions made about the office should be communicated to the workforce, if people understand the 'why' they are more likely to accept change.
- **Employee preferences must be balanced with business demands.** Whilst there may be a perception that these two aspirations are different, our survey indicates a broadly consistent response between managerial and non-managerial employees. Ultimately, effective communication between employer and employee is vital.

2. HOW WILL THE DEMAND FOR OFFICE SPACE CHANGE?

Demand for office space will change and we predict an increasing demand for flexible and locally managed workplaces. 27% of workers reported that they would use an office closer to their home, at least some of the time, as well as their main office, if given the option. The growth of flexible offices has already had an impact on shorter term leases across some of Europe's major markets in the build up to the pandemic. Some tenants are now exploring their options on flex space/grow-on space throughout the building, as landlords begin to incorporate more ready-to-go "plug and play" space within their schemes.

We are observing a shift in workplace location preferences, with 52% of Europe's workers most favouring working in a town/city centre, up from 40% at the start of the pandemic. 27% of respondents would prefer to work from home and 8% from a suburban location. We may begin to see the growth of new satellite offices to cater for workers who seek the balance of an office environment, but in close proximity to their home.

EMEA: Preferred future location to be town/city centre



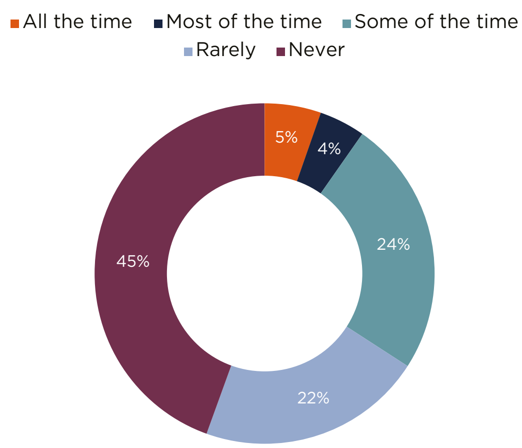
Source: Savills Office FiT

HUB & ROAM

Savills posed the question that if workers were given the opportunity, how often, if at all, would they prefer to work in an office that is shared by other companies/ leased by their company closer to home, rather than commuting to their main office?

9% of respondents reported that they would use an alternative company workplace either all of the time or most of the time, instead of their primary workplace (likely to be the HQ). The commute plays a key role in the overall workplace experience and, therefore, offices based in close proximity to major transport hubs with local amenities will remain in high demand and we anticipate more rental resilience in these locations. It is possible that organisations will either look for small, flexible roam locations, or more likely offer employees greater flexibility to access a range of alternative workspaces via technology enabled day pass booking apps.

UK: How often, if at all, would you prefer to work in an office that is shared by other companies/leased by your company closer to home, rather than commuting to your main office location?



Source: Savills Office FiT

2. HOW WILL THE DEMAND FOR OFFICE SPACE CHANGE?

REMOTE WORKING LOCATIONS

The chart below illustrates the locations that office employees would consider when not in the main office. Of course, home is an option for the majority of respondents. Working in transit, considering the return of more train travel and flights has reappeared as a key option. A preference for working in client offices for 1 in 5 employees is an interesting trend, which has increased from only 1 in 10 at the start of the pandemic. This may have implications for client office space and the need to accommodate more remote workers.

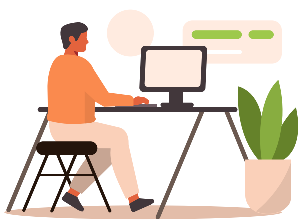
UK: Which locations will you use remotely once the pandemic has subsided (all that applies)?

My home **89%**

Whilst in transit/transport **21%**

Coffee shop **14%**

Client office **19%**



Serviced/flexible office **12%**

Hotel lobby or club **10%**

12% of respondents to the survey would choose a serviced/flexible office, an increase from 3% at the start of the pandemic. We see the flexible offering becoming more attractive to accommodate future employees who wish to operate on a ‘hub & roam’ model.

KEY TAKEAWAYS

- **Alternative work locations have gained greater attention.** For many, the commute is the least desirable element of the working week. For some organisations wider choice of local alternative spaces with flexible leasing arrangements will be beneficial to the overall business strategy.
- **We are seeing a growing interest in a ‘hub & roam’ model.** This gives businesses the ability to offer their workforce a variety of locations and work environments based on a ‘day pass’ process. This utilisation can be monitored and allow businesses to observe trends in evolving work styles with flexibility to adjust as required.
- **External flexible workplaces are a valuable component for businesses in the future.** Flex space can be key for those organisations who are uncertain about their future requirements.
- **We expect natural caution regarding flex space initially as a shared facility.** Users will need to feel safe and be safe to allay anxiety - the more visible measures are, the greater the reassurance.

3. WILL THE PANDEMIC INFLUENCE FUTURE RESIDENTIAL PREFERENCES?

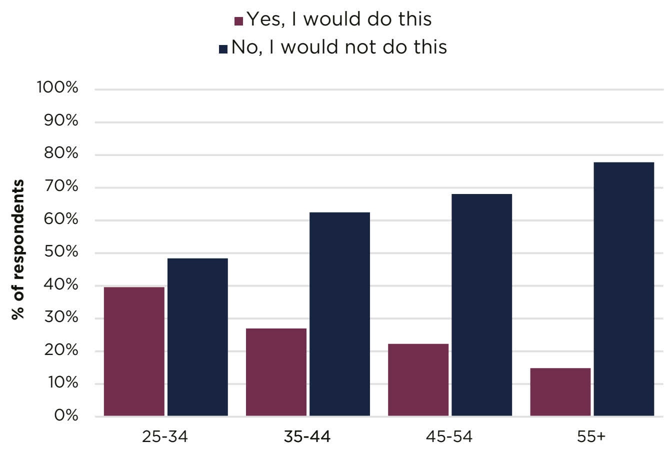
The residential impact has been absent from most surveys to date. The location of the UK workforce is clearly an important factor and the ability to work in a combination of office and elsewhere is an accepted trend going forward. However, where people choose to live is a critical part of the equation. Attracting and retaining talent is a key consideration and for many graduates the provision of flexible working is a priority in their search for the right job.

The survey looked at residential attitudes in a post Covid-19 environment. One question asked was, with the ability to work more remotely, would there be an influence on where people wanted to live?

LOOKING FOR A CHANGE

The chart shows that the younger members of the workforce are, on the whole, staying put, but 40% of respondents are looking for a change. This may include moving further away from town and city centres. The question is whether this has changed over the past year as this age group responds to their future needs in a post-pandemic world. Looking back, last year's survey showed that for the 25-34 age group 62% believed the pandemic would have an influence on their home location. However, over the past 12 months, the appetite for changing their home location has fallen by a third.

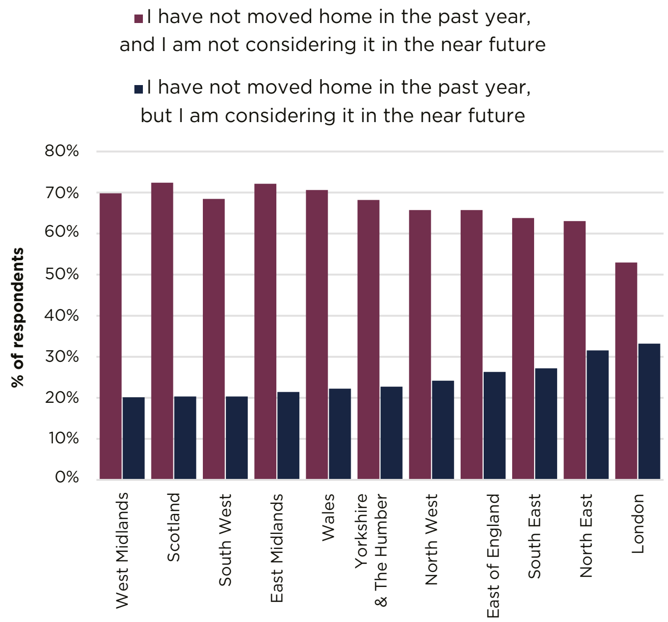
UK: Will I change where I live?



Source: Savills Office FiT

The chart below shows the regions where a residential move is most likely. Of course, a move may be within a region and not necessarily to another UK region or beyond, but it's no surprise to see that the south eastern part of the UK, including London, has the higher percentage of responses. However, the difference amongst regions is not as wide as may have been expected.

UK: Which regions are expected to see more movers?



Source: Savills Office FiT

40%

of 25-34 year olds are looking for a change to their home location (compared to 62% in 2020)

3. WILL THE PANDEMIC INFLUENCE FUTURE RESIDENTIAL PREFERENCES?

There is a potential higher proportion of movement from the south eastern parts of the UK, with 1 in 3 in London and 1 in 4 in the South East considering a move in the near future. The question is whether this is a similar figure to the trend in pre-pandemic times.

Moving to another area may provide more open space and fresh air, as well as preferable schools and a bigger house. With a shift to a hybrid working model, office employees may have more opportunity to make a residential move.

The anecdotal evidence has been that London is seeing a much higher proportion of office-based employees moving away. With 30% of Londoners considering a move, versus 20% in the West Midlands (the lowest response), our survey results don't show significant enough differences amongst these regions.

Demand for more home workspace is encouraging people to up-size their home. 29% of our respondents reported they would change the size of their home to make more space to facilitate remote working. However, considering a move is very different to actually doing it and only 1.5% of respondents have actually moved home in the past 12 months now that they can work more remotely.

29%

reported they would change the size of their home to make more space for working

KEY TAKEAWAYS

- **The pandemic has clearly resulted in people considering their home location and size.** However it is not just about accommodating home-working, for many this period will have given them time to think about how and where they want to live.
- **For city dwellers lockdown will have highlighted the benefits of personal outdoor space.** This can be facilitated in more suburban locations which, alongside the potential of a shorter commute, could provide the ideal balance for some people.
- **The concept of living in an area with open space and less congestion may help manage the transition out of the pandemic.** This will have increased in importance as everyone has become more aware of their own and others' health.
- **In 2020, 62% of survey respondents, in the 25-34 age group, said that the pandemic would influence their future home location. This has fallen by a third to 40% in 2021.** This shows a knee-jerk reaction to the lockdown in 2020 and they are now giving greater consideration to their wider priorities, beyond simply home-working.

4. HOW MUCH AND HOW OFTEN WILL THE WORKFORCE BE IN THE OFFICE?

How many days employees prefer to spend in the office has been hotly debated over the past 15 months.

55% of respondents want to work in the office at least three days per week, although there was a weaker preference for remote working from younger workers. A higher proportion of workers aged 55+ expressed an interest in working from home full time, although collaboration and exchanging ideas will be essential for younger workers to learn and develop within the workplace.

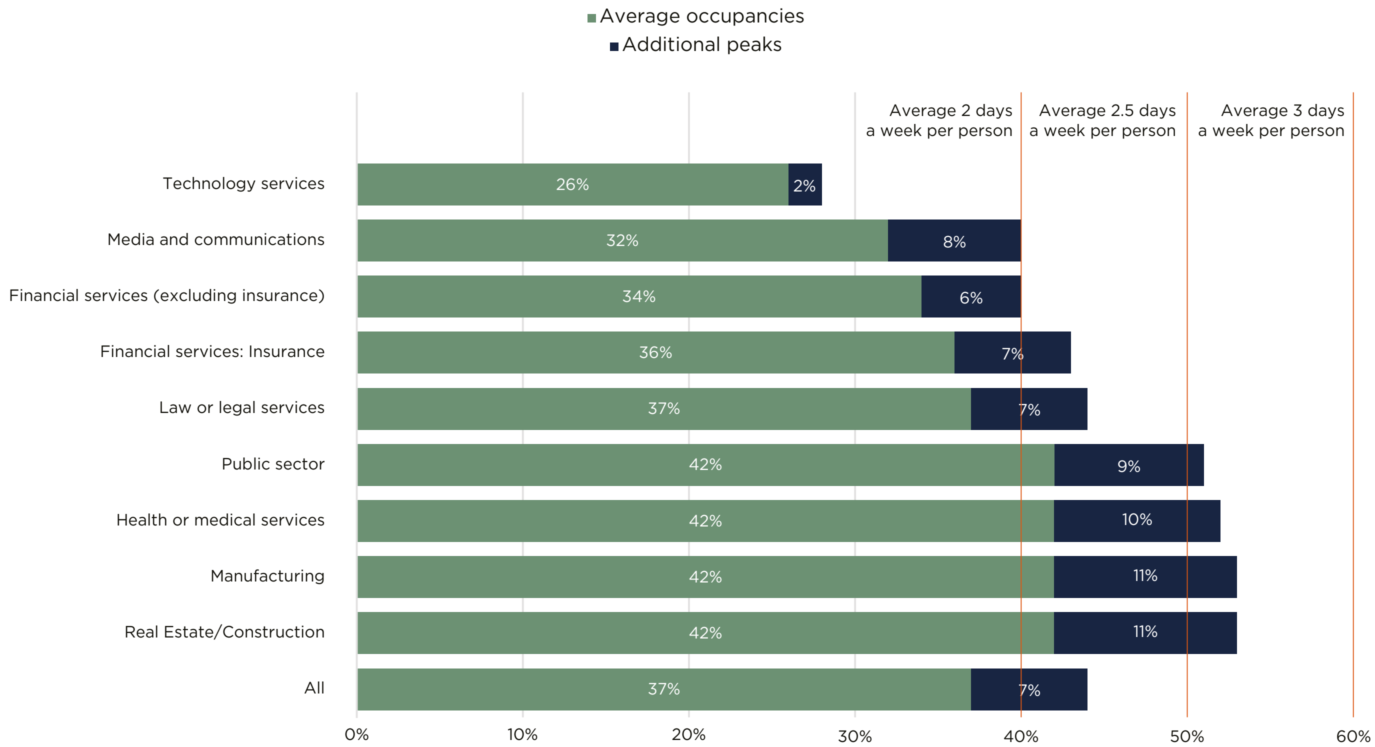
55%

want to work in the office at least three days per week

DIFFERENCES ACROSS SECTORS

The results below show clear differences in desires in office occupancy between industry sectors. Typical differences between average and peak occupancies throughout the week may account for 7% of total headcount.

UK: Average workplace occupancies based on preference for number of days working remotely

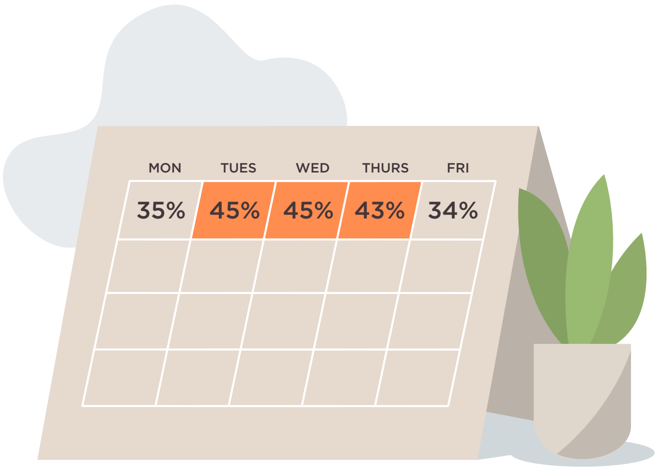


Source: Savills Office FiT

4. HOW MUCH AND HOW OFTEN WILL THE WORKFORCE BE IN THE OFFICE?

Our survey results indicate that the current sentiment is to work from the office during the middle of the week, dropping by 11% on Fridays. This has potential issues for the workplace being less dynamic and attractive at the beginning and the end of the week, a topic that has been raised widely. However, this reflects a point in time where the workforce are not fully back to their offices. We expect this sentiment to evolve as business needs are balanced with employee preferences and physical events become more commonplace.

UK: Percentage of respondents choosing their preferred days to work from the office during a typical week



Source: Savills Office FiT

KEY TAKEAWAYS

- **Occupiers' concerns around managing office use range from under-populated workspaces to managing peaks in the office on more favoured days.** There is not one single solution that will suit everyone, however protocols need to be in place to help staff navigate new expectations. Baseline occupancy level could be introduced, bringing the average to 50-60%, more than our results indicate.
- **Monitoring and measuring new working patterns will be important to adapting the workplace.** Sensors and desk booking apps can assist with navigation and organisational demand as staff become accustomed to the physical-digital workplace. This will also enable trends to be identified and modifications put in place before issues become significant stress points.
- **Flexibility will increase the attractiveness of the workplace for employees.** Increased flexibility can be delivered through shared meeting rooms, town-hall spaces and short term desk space. Developers are considering the wider benefits of these, supported by the appropriate technology.
- **The key is to make space simple to adapt and change.** Tasks or activities that were well supported in the home environment now need to be available in the workplace.

5. HOW DO WORKPLACES NEED TO ADAPT?

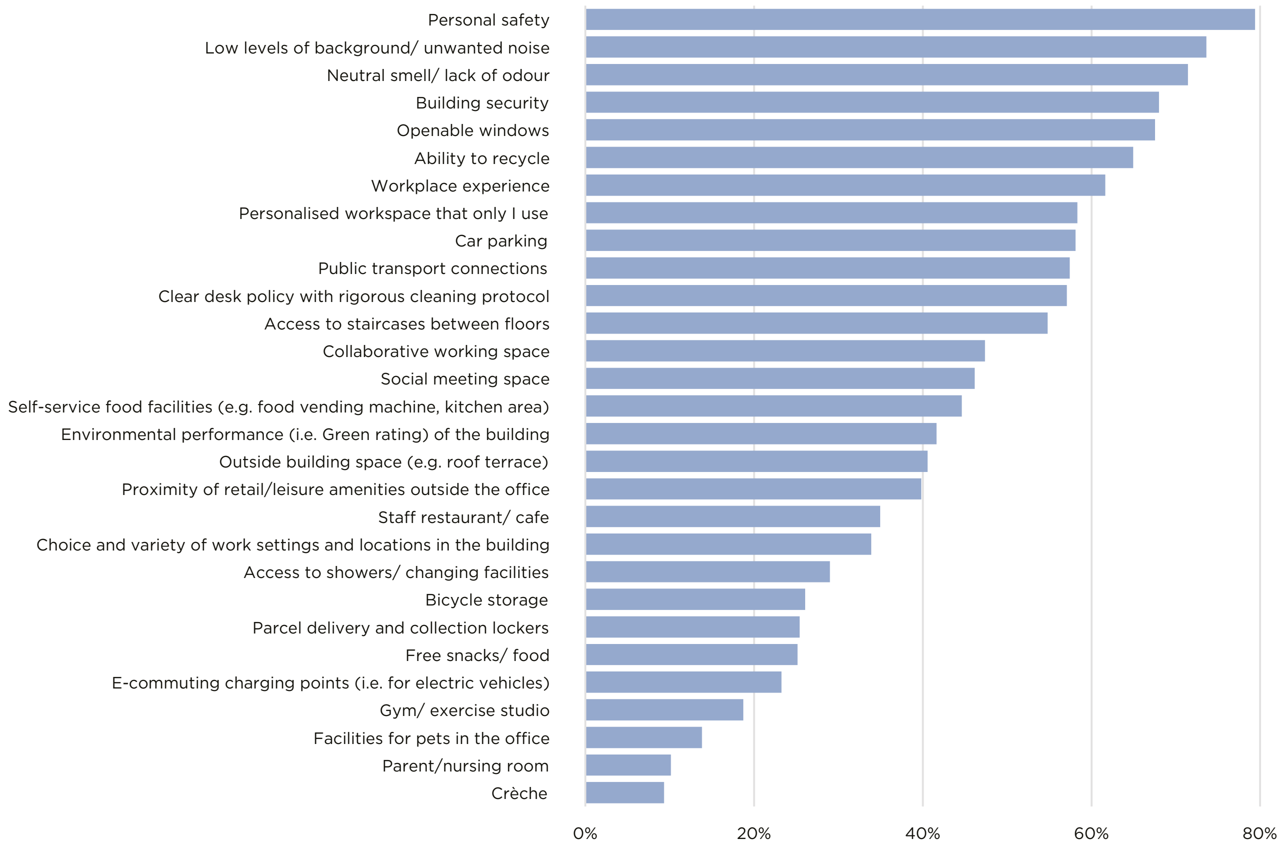
Personal safety, low levels of background noise and a neutral smell in the workplace feature among the most important factors from EMEA office respondents. Since last year's survey, the importance of low levels of background noise has increased significantly. For some this will have been the experience of the partial return to work and, for others, the distractions at home. 74% of respondents reported the need for lower levels of unwanted background noise in a return to the office, whereas 62% of respondents reported the workplace experience to be important. Noise control will be critical. 72% of respondents reported that the home provides better acoustic control, so allocated quiet working areas will be required for focussed work in the office.

PERSONAL SAFETY

Personal safety featured at the top of the high priority list regardless of gender, age or seniority. This may come as no surprise within a pandemic environment, but it is the first time that we have asked this question. How companies respond to this through building management is clearly important in terms of how much safety consideration can be built in by the owner/ developer and what this means for the design of buildings in the future.

Some factors may be surprisingly low on the 'importance' scale, including bicycle storage. However, these factors may over time have become expected as standard in office space and therefore registered as less important than indicated in previous Savills surveys.

UK: What are the important factors for office employees (% saying a high importance)?



Source: Savills Office FiT

5. HOW DO WORKPLACES NEED TO ADAPT?

A key positive response for the office, which Savills highlighted in last year's survey results, were the factors that are clearly best met in an office environment. We asked the same question again in this year's survey. As shown in the infographic below, the office still dominates, but some factors have seen a slight decline. This is presumably as the acceptance of working from home has strengthened over the past 12 months. However, colleague collaboration, arguably the most important factor for organisations to embrace, has resulted in the office become slightly more important, rising from 61% to 63% from our recent survey results.

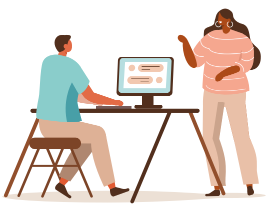
The transition to a hybrid workforce will remain a key challenge for businesses over the next five years. Workers still consider allocated/assigned desks (36%) as the joint most important factor in forming the ideal workplace, alongside space for full teams to gather (36%). Social/breakout areas (34%) and large meeting rooms with other audio/video call facilities (30%) compete amongst the most important workplace factors.

The importance of an owned desk will rank higher for those who have not experienced a workplace that facilitates a variety of work-styles. However, to meet the needs of the workforce a hybrid combination of solo workspaces alongside collaborative space will be required. This may result in the need for additional office space, yet what is most important is the ability for the space to adapt and meet the needs of its users.

To facilitate hybrid working new technology and digital initiatives will become vital to integrate the home and the office, creating a smart and seamless transition between spaces that support communication channels. Physical spaces must be adapted for the increased acoustic pressure of virtual calls without taking up valuable meeting rooms. It is not just the physical space, but how teams are managed to avoid a proximity-bias creeping in and creating a two-tier culture. The convenience of virtual calling is here to stay, so how it is managed will be critical to success.

UK: Best met in the office (% of respondents)

Company/Team Spirit



Office: 68% **Home: 6%**

Networking Opportunities

Office: 65% **Home: 6%**

Collaboration

Office: 63% **Home: 7%**

Mentoring Opportunities

Office: 58% **Home: 7%**

Client Meetings

Office: 53% **Home: 9%**

Support From Management

Office: 40% **Home: 8%**

Career Advancement

Office: 43% **Home: 7%**

5. HOW DO WORKPLACES NEED TO ADAPT?

ACOUSTIC CONTROL

The importance of acoustics has been one of the most significant subjects to emerge from the pandemic. As discussed already, acoustic control will be critical to user experience, to facilitate both collaborative and focussed work. It will be different from the telephone and in-person exchanges in pre-Covid offices. Calls are going to be longer, with greater numbers of participants, with a mix of remote and physically present attendees. Not all of these can occur in acoustically isolated conference rooms and are likely to be in open office environments. Therefore, the demand for acoustic control will go beyond noise-cancelling headphones and headsets. Acoustic design, from the outset, should be a primary concern.

74%

reported the need for lower levels of unwanted background noise in a return to the office

KEY TAKEAWAYS

- **Many people have become used to controlling their working environment at home and will need to relearn working alongside others.** The home offers comfort and convenience, however this is not sustainable long-term in many aspects for either business or individuals.
- **Acoustic control has become extremely important.** Pre-pandemic, noisy open plan spaces were high on the work-stress list and now with calls and meetings taking place both in person and virtually, people are already prioritising acoustic control in the office as a crucial factor.
- **We should consider repurposing and refurbishing older buildings.** Where possible, older buildings should not be demolished in favour of new buildings, so as not to waste resources and materials.
- **An enriched environment which engages the five senses can increase both productivity and user wellbeing.** Environments that deliver a sensory experience are proven to boost employee wellbeing where workers can choose the environment that best suits their needs.

6. HOW CAN WE ACHIEVE A BALANCED PHYSICAL-DIGITAL ECOSYSTEM?

A balanced physical-digital ecosystem that effectively bridges the gap between remote and office-based workers, in terms of experience, accessibility and reliability, will be vital moving forward. However, technology can offer a great deal more to occupiers.

Workers consider good quality Wi-Fi (91%) and mobile signal (85%) to be the most important factors in creating the ideal office, receiving a significantly higher response than other technologies. This demonstrates that many businesses have improvements to make in what is considered a fundamental requirement.

However, haptic technology including touch-free sensors, temperature scanners and building apps to locate colleagues have risen in importance, particularly for the tech and media sectors, but less so for the legal sector. Adapting occupiers' existing technology to ensure remote workers feel included and engaged is now more critical than ever.

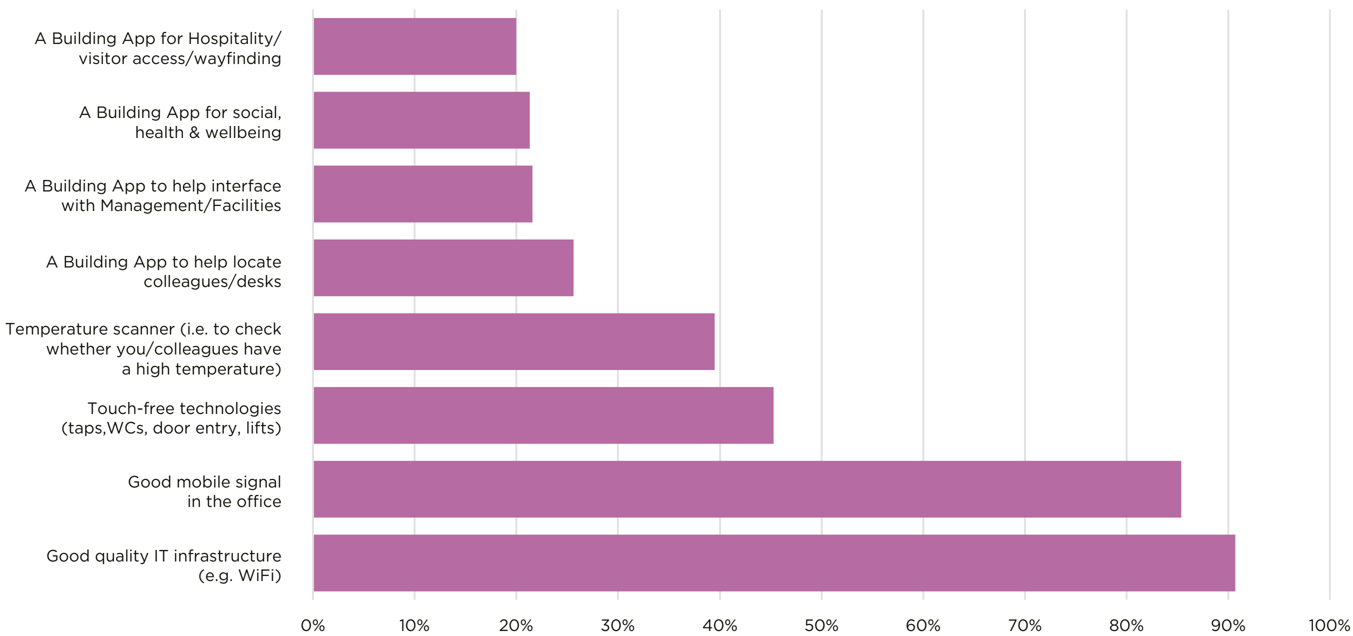
USE OF BUILDING APPS

Tracking data on emerging work patterns and utilisation will be vital for business operations and must be a consideration within property management. 26% of workers reported that a building app to help workers locate colleagues and desks is important, whilst 22% reported that an interface to help with facilities management is important. Space management systems will be essential for businesses to track space utilisation and allow modifications to the workplace.

26%

of workers reported that a building app is important

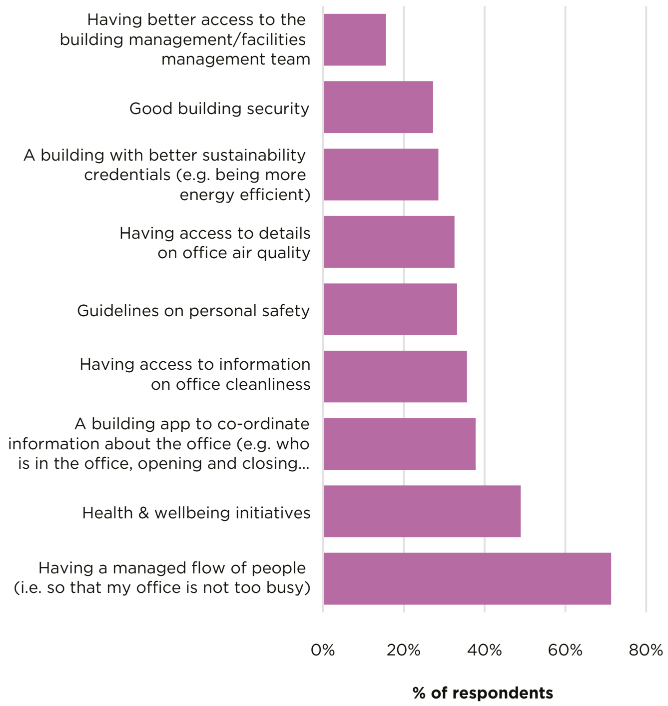
UK: How important are each of the following technologies in creating an ideal office workplace for you? (% saying a high importance)



Source: Savills Office FiT

6. HOW CAN WE ACHIEVE A BALANCED PHYSICAL-DIGITAL ECOSYSTEM?

UK: Share of respondents regarding work settings/ amenities that will make employees more comfortable



Source: Savills Office FiT

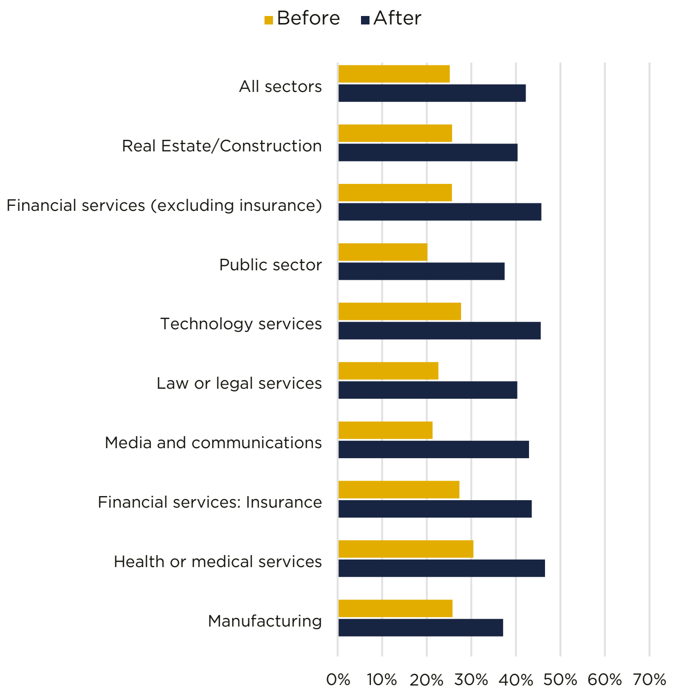
KEY TAKEAWAYS

- **Smarter spaces are not just about technology.** Smart spaces are accessible, inclusive and adaptable to meet the needs of the users and their businesses.
- **To assist in managing new protocols, an intelligent space management app is key.** At the most basic level it ensures that people coming into the workplace can either identify a location to work or book a work-space. Beyond that, they can identify a colleague's location, select a space for collaboration or more focused work, or the appropriate setting for whatever is needed.
- **Technology can support a smarter environment by monitoring temperature, air quality, noise and energy consumption, as well as providing feedback to facilities management teams.** From a business perspective, it provides empirical data on space utilisation and energy consumption. But can also improve user experience through adjustment where necessary for comfort and convenience.
- **Workers consider good quality Wi-Fi and mobile signal to be the most important factors when creating the ideal office.** Organisations must consider these basic requirements as fundamental to a more mobile workforce. Technology must work better in the office than at home.

7. WHAT ARE OUR NEW HEALTH & WELLBEING PRIORITIES?

At the start of the pandemic, only 25% considered health and wellbeing a priority, which is expected to rise to 42% after the pandemic. Financial services workers reported the largest rises in health and wellbeing provision from their companies in response to the crisis. We have observed more tenant interest in private terraces, public realm and community spaces as a result of changing post-pandemic preferences.

UK: How much of a priority would you say your organisation considers/considered the health and wellbeing of its employees (% saying a high priority)?

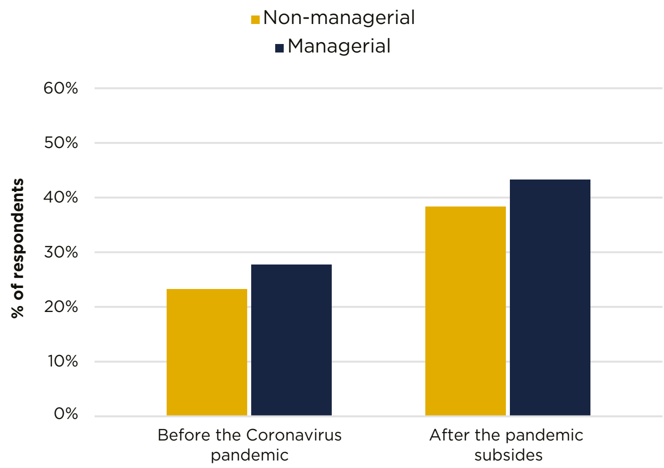


Source: Savills Office FiT

MANAGER-EMPLOYEE DIFFERENCES

What the chart below shows is that, post-pandemic, the importance of overall health and wellbeing will be higher than it was before the pandemic. This is no real surprise, however, what is interesting is that the managerial responses show a higher percentage considering health and wellbeing as a 'high priority' compared to non-managerial responses. The choice for this question was high, medium or low priority. There is a clear need for more positive communication to the workforce from the C-suite and at all management levels. It is likely that the key issue of safety will be addressed, perhaps more than employees believe. The return to the office will be even more accepted by the workforce with clearer communications.

UK: How much of a priority would you say your organization considers/ considered the health and wellbeing of its employees (% saying a high priority)?



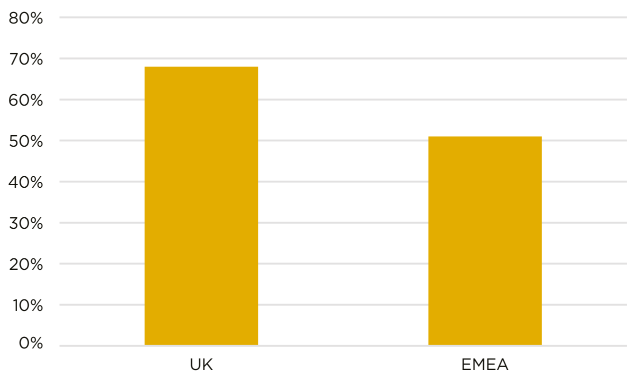
Source: Savills Office FiT

7. WHAT ARE OUR NEW HEALTH & WELLBEING PRIORITIES?

DESK SHARING

68% of UK workers reported that they would be comfortable sharing desks after the pandemic subsides, against only 51% of the rest of EMEA workers.

EMEA: If offered the option to work from home on a regular basis, are you happy to share a desk/workspace in the post-pandemic office? (% saying yes)



Source: Savills Office FiT

Some of this can be paired with the lower occupational densities across EMEA markets in relation to the UK. For example, London's workers have an average allocation of 9 sq m per employee, whereas workers in Amsterdam (16 sq m), Munich (16.5 sq m) and Paris (11 sq m) have a higher allocation of space per head. The examples outside of the UK are driven by local codes, but clearly the higher generosity of space is more accommodating to future needs of employees in the office. In response to this, in the UK the British Council for Offices announced they would almost certainly be adjusting the density recommendations allowing more space per employee.

55%

on average across all business sectors are willing to share desks

Analysing more specifically by sector, workers in media and communications (61%) and financial services (61%) reported that they would be willing to share desks / workspace when returning to the office. The legal sector, on the other hand, expressed discomfort at sharing space on return to the office.

Although workers value being near their colleagues, the long term shift to higher occupational densities may begin to be reversed as workers demand more individual space. Having a managed flow of people was the most important factor for 47% of workers to return to work more frequently, followed by health and wellbeing initiatives (32%).

KEY TAKEAWAYS

- **The importance of health & wellbeing of staff has naturally increased,** with the financial sector reporting the greatest increase. We are all much more aware and employees will seek reassurance from their organisations that their needs are met.
- **Desk sharing will become commonplace in an agile workplace.** However, our survey shows variations across sectors and regions. It is likely that sentiments expressed in the survey come from those that have not experienced an agile or better landscaped workplace.
- **People's perception of a shared desk typically assumes that desks are shared over a single day** leading to the disruption of having to frequently move and clear belongings. This might be true for some but for others a desk could be allocated on a daily or even weekly basis dependent on tasks.
- **Increased demand is being seen for more open, green space;** spaces that people perceive to be important by both organisations and individuals alike. Buildings that offer natural ventilation will be popular. Those that cannot will need to demonstrate effective ventilation strategies to address concerns.

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Savills Office FiT was launched in response to the Covid-19 pandemic. It has been providing clients with practical, strategic and design-led advice and insights from our global experts, enabling the development of new strategies as owners and occupiers adapt, evolve and improve the workplace. Find out more at:

savills.co.uk/OfficeFiT