

Workplace Pulse: Market Insights

May 2021

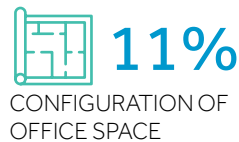
Our quarterly Workplace Pulse: Market Insights synthesizes insights from some of the world's largest employers on their plans for post-COVID work place environments. We surveyed nearly 150 global companies this quarter—across a variety of industries. Here's what we learned:

KEY INSIGHTS

- Globally, over half of responding companies anticipate a material "return to new normal" by end of Q3.** The Americas region remains the least optimistic about RTO in the near term.
- The majority of companies are rethinking their workplace.** Nearly 75% of employers responding anticipate launching new workplace projects by the end of 2021.
- A shift toward hybrid working and smaller physical office environments continues to dominate organizational thinking about real estate in 2021.** Just 16% of respondents globally expect to proceed with major projects of 50,000 sq. ft or upwards
- Respondents' biggest "pain point" when considering "return to new normal" is workplace strategy.** This comes ahead of additional cited challenges including employee safety, varied geographic needs, space configuration, and timing.

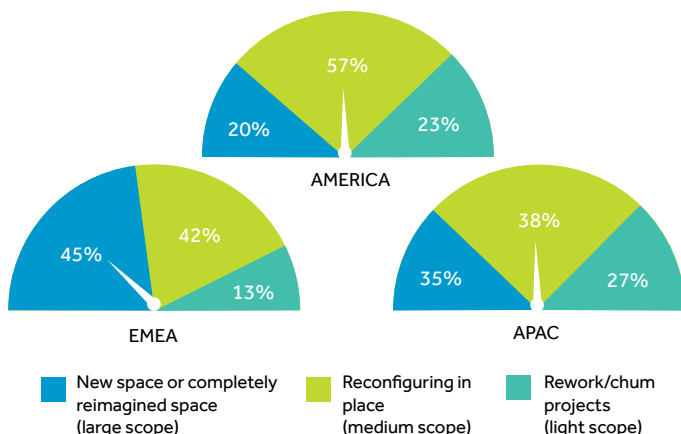
Workplace strategy is the most common pain point among companies considering their "return to workplace" needs.

Q: What's your biggest concern/pain point when considering your "return to new normal" workplace strategy?



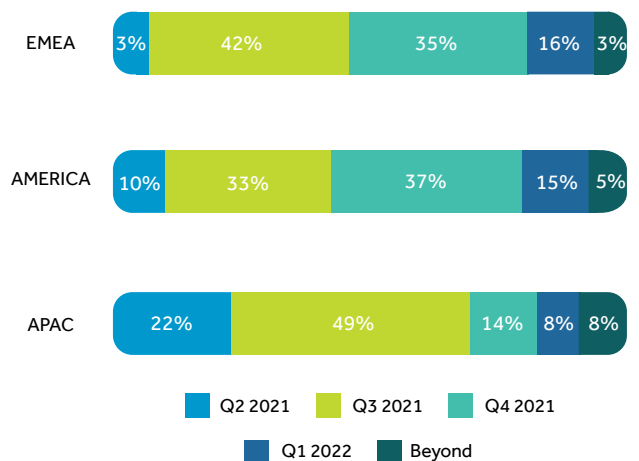
Many companies are focused on reconfiguring their existing spaces.

Q: Which of the following best describes the majority of your current and/or future workplace projects?



Globally, over half of responding companies anticipate a material "return to new normal" by end of Q3.

Q: When do you anticipate a material 'return to a new normal' relative to utilization of the workplace for your company?



A shift toward hybrid working and smaller physical office environments continues to dominate organizational thinking about real estate in 2021.

Q: For your first/next release of design and construction projects, what would you anticipate the average project size?

