

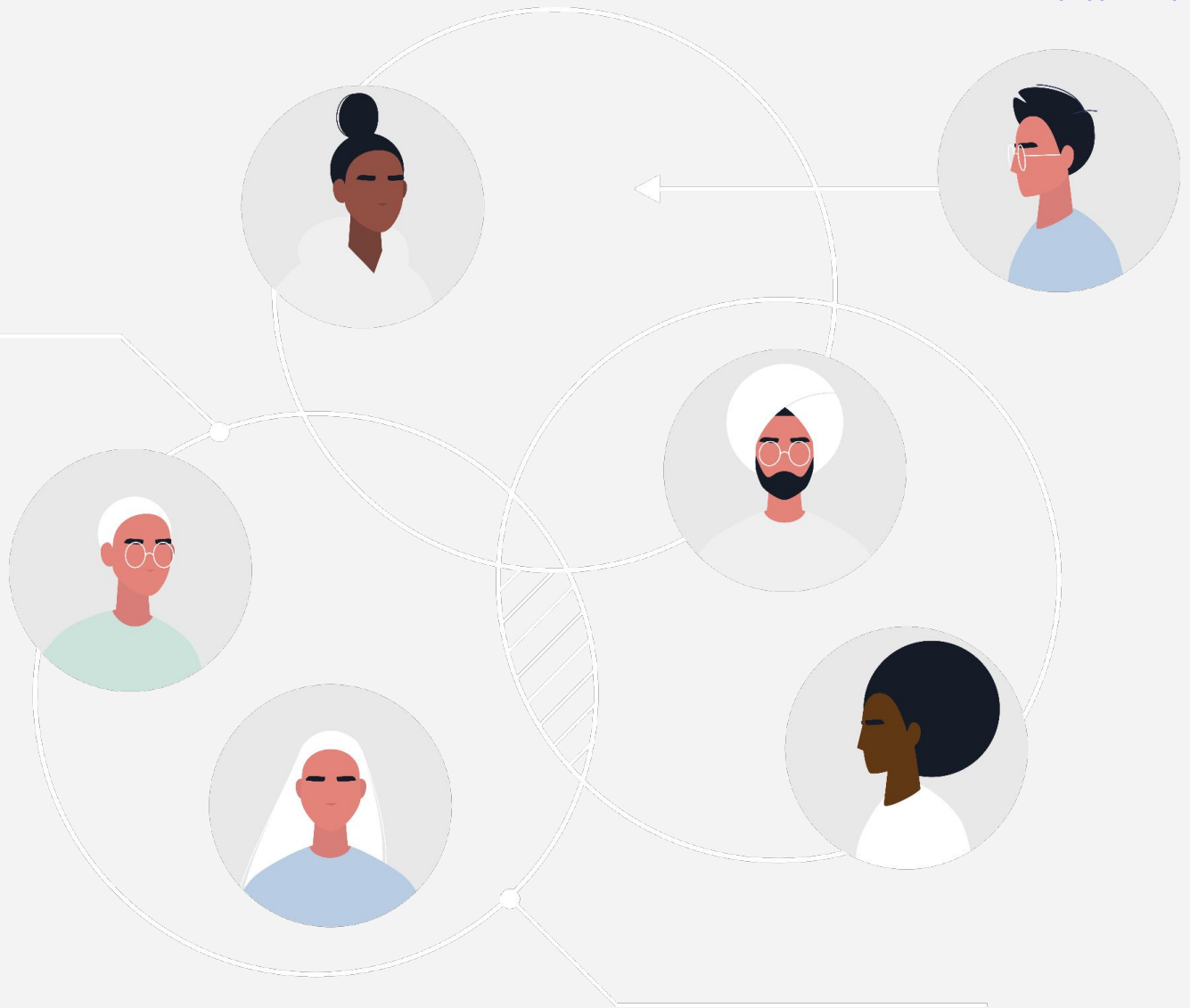


2021

# Global Office Tenant Report

Future of Work Edition

**EQUIEM**



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# Introduction

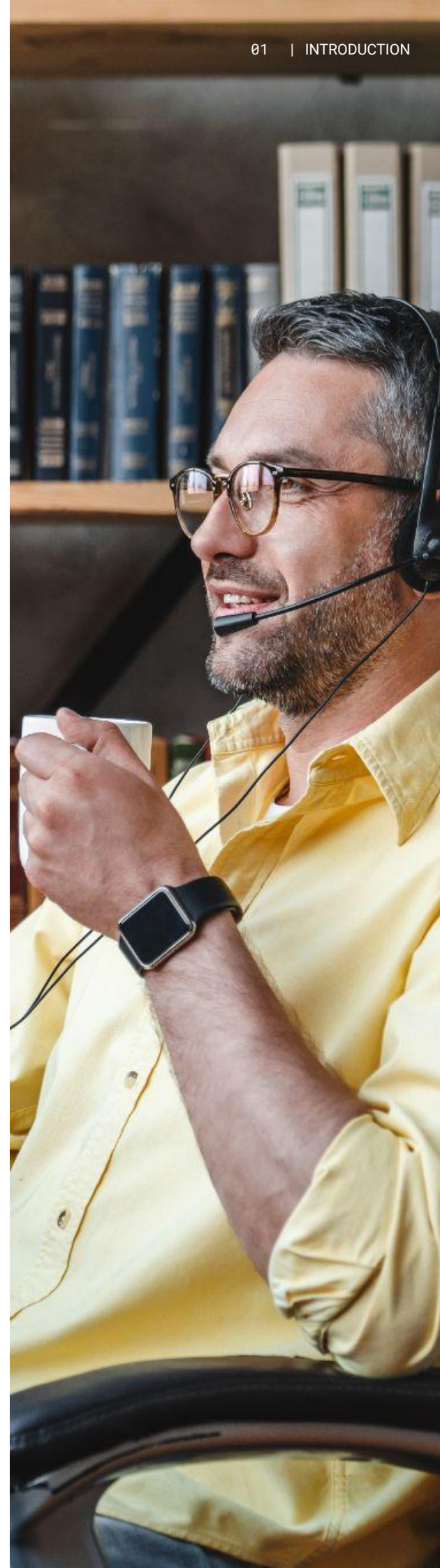
The future of work is taking shape, and technology gives us an exclusive look at its progression.

In the US and UK, as building occupancy rates slowly rise, emergent trends are painting a solid picture of customer desire: The need for **productivity, safety, collaboration and community**.

In Australia, where COVID-19 lockdowns have been the longest and most prevalent, the range of customer wants and sentiments is producing **unexpected intelligence**. These data may help landlords in all regions plot their visions for **next-generation offices**.

This report analyses data obtained in an annual survey, conducted in September 2021, of our global customer base. It examines the changing landscape of customer service in CRE, the differing wants and needs of customers in Equiem's three regions, and how technology has impacted the lives of **hybrid-working** occupiers over the last 18 months.

This year, the survey garnered over **3,200 responses** from companies across various industries in the US, UK, Ireland and Australia.



# What we learned:

**In Australia, the best-rated workplaces are preferable to remote working.**

The majority (44%) of occupiers said they would work in the office more often if their office was rated to be one of the best in the world. Globally, more than half of occupiers are open to spending most of their time in an office that caters to their needs.

**What does that office look like?**

When asked to describe their ideal offices, occupiers rated relaxation zones (49.2%), fewer desks (34.4%), and more workout areas (34.3%) highest among the desired features.

**Technologies that prioritize safety, convenience, and flexibility are critical to the future workplace.**

Touchless access control (54.1%), Indoor Air Quality (37.8%), and flex space options (37.1%) are among the highest-rated features desired by returning occupiers. These weightings are consistent across the US, UK, and Australia.

**Tenant experience platforms are key in providing both safety and enrichment.**

Even in the vaccinated world, occupiers want regular updates on COVID-19 (66.8%). They also want their platforms to provide competitions (51%), good news stories (42.6%), and wellness events on remote working days (34%).

**After COVID-19, people want the office to be a hub for community and productivity.**

73% of occupiers said the main purpose of the office is to stay connected to colleagues; the second-highest-rated purpose (70%) was a 'place for collaboration'.

**Two-thirds (66%) of occupiers said their Equiem platform is their preferred tool for staying up-to-date on their building and, in particular, safety guidelines.**

Landlords keep in contact with occupiers using a mix of news updates, email newsletters, and digital screens, all coordinated using the Equiem CMS.

**Occupiers are finally adjusting to remote working, but remote fatigue is a concern.**

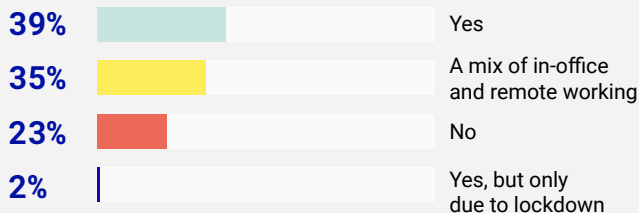
46.35% of occupiers said they are more productive when working remotely, compared with 33.64% in May 2020. Conversely, the amount of people who say they are just as productive in the home as in the office has dropped: 39.61% in 2021, compared to 47.86% in 2020.

# Working remotely

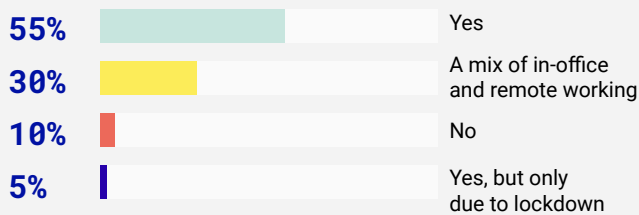
Just under half (**48.9%**) of **occupiers** are working exclusively from remote locations – down from **91%** in May 2020. **30.3%** of **occupiers** are hybrid workers, dividing their time between their main HQ and remote offices. Of course, we expect these numbers to change as COVID-19 abates.

When asked, ‘**Are you currently working remotely**’, respondents said:

## US



## UK



## AUS



Of those working remotely, **88.3%** are **working from home**. **13.9%** are **working from home** and a **second location**, such as a hub-and-spoke office, and **2.4%** are working in a **flex/shared office** (such as a WeWork office).

**46.3%** of global remote workers believe they are **more productive when working remotely**, compared to working in-office. **39.6%** said they were about **as productive**, and **11.7%** said they were **less productive**.

	2020	2021
More productive	33.64%	46.35%
About the same	47.86%	39.61%
Less productive	16.49%	11.74%
Unsure	2.01%	2.31%

**87.6%** of **occupiers** said the biggest reason for the **increase in productivity** is the **lack of a daily commute**. In 2020, this was also the main reason, but it accounted for 40% of responses.

## While working at home/remotely:

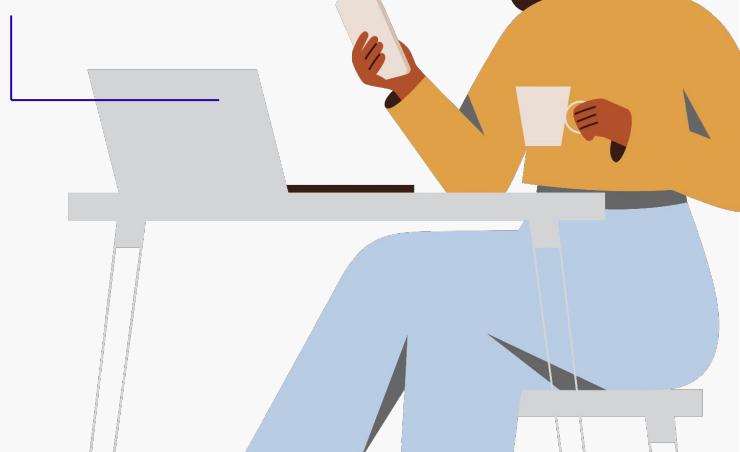
**56%** said they were spending 2-4 hours in work-related video chats per day (up from 47% in 2020)

**30%** said they were spending 1 hour or fewer in work-related video chats per day (down from 31% in 2020)

**15%** said meetings are less efficient (up from 6% in 2020)

## 34%

of occupiers said that support from management to stay remote would most improve their working life.



## Detriments to productivity

The working day is harder and longer at home. Productivity is up, compared with the office, and more occupiers have created an optimal work setup – less than a fifth are now managing with insufficient space and equipment. However, many are finding it hard to switch off: **Reports of the blurring between work and home life are up by 6% compared to last year.**

**When asked about the factors reducing productivity at home, occupiers said:**

	2020	2021
Distractions/requests from family members	38.11%	35.3%
No clear start/end to the day	27.67%	33.9%
More technical/internet issues	31.6%	27.8%
Insufficient work setup	26.75%	18.9%

### Other responses:

*“More pressure to meet online with my team to ‘check in’, which wastes hours of my week.”*

*“Distracted by household errands like doing dishes, prepping my next meal...making personal calls, distracted by pet.”*

*“Harder to get answers from colleagues.”*

*“Less social interaction and thereby less mentally stimulated and less motivated.”*

*“It is harder to give or receive training.”*

## Productivity is up, but social connection is down

When asked, ‘**Do you have ‘social’ video meetings with your team while working from home** (e.g. Friday video drinks sessions)’, occupiers said:

2020 **70% YES** **30% NO**

2021 **59% YES** **41% NO**

Furthermore, when asked what they **miss most about working in the office**, occupiers said:

	2020	2021
Informal chats with colleagues	45%	81.4%
The separation of work and home life	31%	56.8%
In-person workshops and team meetings	10%	47.9%

The reduction of social video calls is likely related to the ‘[Zoom fatigue](#)’ phenomenon. Occupiers who spend long periods of time in work-related calls tend to deprioritize discretionary social time with colleagues.

These sentiments are consistent across the globe. Social isolation is a common theme.

	US	UK	AUS
Informal chats with colleagues	76%	86%	88%

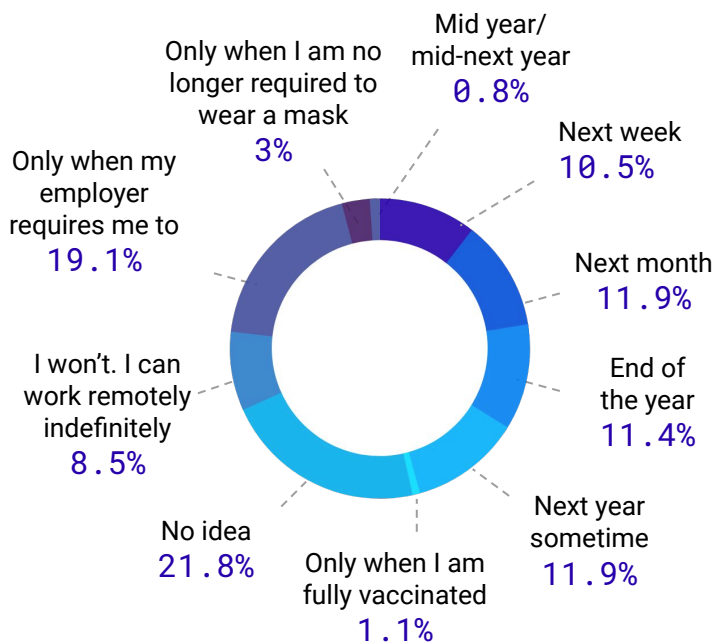
The separation of work and home life	55%	56%	64%
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In-person workshops and team meetings	42%	50%	59%
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## Even as more people have the option to return to their offices, most don't have a solid picture of their future working arrangements

Nearly **70% of occupiers** count on **returning to the office** at some point, down from 98% in May 2020. Despite this, only **8.5%** say they **will not return to the office**.

When asked **'When do you think you might return?'**, in September, occupiers said:








	US	UK	AUS
No idea	23%	15%	31%
Only when my employer requires me to	21%	19%	14%
I won't	13%	6%	2%
Next year sometime	14%	9%	14%
Only when I am no longer required to wear a mask	2%	1%	9%



More people are comfortable with their remote working setups, but many are dealing with the same issues uncovered at the start of the pandemic

When asked **what would most improve their remote working lives**, occupiers said:

	Better work setup at home/remotely	56%	44%
	Better Wi-Fi	28%	28%
	Better access to home health and wellness options	25%	27%
	Better access to work-from-home resources	18%	20%
	Increased interaction with my colleagues via video chat	12%	15%



Despite high incidences of remote working, most occupiers are not planning on relocating yet

Much has been said of the [great migration away from cities and workplaces](#), as induced by the shift to remote working.

Despite this, most of the people (63.12%) who are not going back to the office full-time are NOT considering moving farther away from the office. 21.43% are considering moving farther away; 15.45% are not sure.

# Working in-office

As at September 2021, **16.4%** of global surveyed occupiers are working in the **office full-time**. **30.3%** are working in the **office part-time** (most of them two days per week, on average).

As with May 2020, just over two-thirds of this cohort said that **COVID-19 restrictions have impacted their daily working life**. In Australia, where COVID-19 rules have been stricter and longer-lived, the impact to regular office life has been greater.

**80.6%**

of those working in the office now are fully vaccinated

**7.7%**

have had at least one dose of the COVID-19 vaccine



When asked, 'How much have COVID-19 restrictions impacted your daily life in the office,' occupiers said:

2020		2021
<b>37%</b>	A lot	<b>36%</b>
<b>33%</b>	Somewhat	<b>32%</b>
<b>20%</b>	Not much	<b>22%</b>
<b>10%</b>	Not at all	<b>10%</b>

2021				
<b>US</b>	A lot	<b>34%</b>	Not much	<b>22%</b>
	Somewhat	<b>33%</b>	Not at all	<b>11%</b>
<b>UK</b>	A lot	<b>36%</b>	Not much	<b>22%</b>
	Somewhat	<b>32%</b>	Not at all	<b>9%</b>
<b>AUS</b>	A lot	<b>45%</b>	Not much	<b>18%</b>
	Somewhat	<b>31%</b>	Not at all	<b>6%</b>

This is a reversal of the situation in May 2020, where UK office workers were most impacted, and Australian workers the least.

The majority (**41.5%**) of office-working customers believe they are as productive working in the office as they are from home. **24.7%** believe they are more productive, while **24.4%** believe they are less productive. **9.4%** of occupiers were unsure.



In the US, **9%** of companies require COVID vaccination, compared with **2%** in the UK and **1%** in Australia.

## Most early-returners are vaxxed, but the perception of risk remains

Despite the high rates of vaccination, 35% of occupiers rate their chances of contracting COVID-19 as 'medium'.

2020		2021	
20%	Very low	17%	Very low
27%	Low	31%	Low
26%	Medium	35%	Medium
17%	High	13%	High
10%	Very high	4%	Very high

More than a year later, office-going customers are adhering more than ever to COVID-19 safety guidelines as a first line of defence. However, adherence to these measures is creating disconnected, isolated workplaces, with downsides similar to the home office.

When asked, 'What safety measures are you using while working in the office', occupiers said:

	2020	2021
Increased hand washing	26%	61%
Limited face-to-face meetings with colleagues	21%	43%
Less in-office socializing with colleague	19%	33%
Wearing a face mask	12%	63%
Moving desks to be farther away from other colleagues	11%	37%
I am fully vaccinated	N/A	71%

Across the three regions in 2021, applied safety measures differ somewhat – particularly in Australia, where the vaccine rollout lags slightly behind.

	US	UK	AUS
Increased hand washing	59%	62%	66%
Limited face-to-face meetings with colleagues	45%	39%	42%
Less in-office socializing with colleague	35%	30%	30%
Wearing a face mask	69%	48%	69%
Moving desks to be farther away from other colleagues	26%	54%	40%
I am fully vaccinated	36%	77%	36%

Companies, too, have ramped up governance of COVID-safe practises at a company level. Many have introduced new measures in aims to keep occupiers safe at the office.

21% 74%  
2020 2021

Use of sanitizing stations in the office

21% 60%  
2020 2021

Requests to increase hand washing

14% 14%  
2020 2021

No face-to-face meetings

N/A 17%  
2020 2021

Requiring COVID vaccination

20% 74%  
2020 2021

Social distancing measures between desks/colleagues

11% 49%  
2020 2021

Face-to-face meetings with social distancing restrictions applied

3% 7%  
2020 2021

Rostered lunch times to reduce interaction in the break room

N/A 34%  
2020 2021

Rostered office days with limits to occupiers working in office at the same time

## We asked our customers to qualify their response to the impact of COVID-19 restrictions on their daily working life\*

"I wipe down my entire cube with sanitizing wipes every morning. I eat lunch by myself inside my cube. I keep my mask on the entire day."

"Less interaction with colleagues as we **need to distance**. Meeting rooms accept **fewer people**, so everyone will continue sitting at their desks for online meetings, making the office very noisy. Working in-office with a **mask makes it hard to communicate**."

"A lot more time is spent in **virtual meetings** and collaborating/messaging. It somewhat **lowers my productivity**."

"A lot of COVID-related changes have resulted in more procedures to implement, and more paperwork. Otherwise, the lack of office social events throughout 2021."

"A lot of my colleagues work from home and **planning meetings can be a challenge** when you are not sure where anyone will be on any day."

"**Annoyed** at needing to **wear masks**, but otherwise not affected."

"**Less people** are around **in the office** to network with, and face-to-face training and workshops are non-existent."

"Not as many social events due to restrictions. Less people are in the office, so the **office culture has changed**."

"Our office is spread over several floors, and **mask-wearing** in the lift is a **nuisance**."

"I **miss** having a full **team present**."

*\*Note: Some of the responses have been edited for grammar and clarity*



# Returning to the office

We asked our customers to look to the near future, when the majority (~80%+) of people in their city, state, or country are vaccinated. This is the closest we might get to a pre-COVID scenario for some time.

It is critical that landlords create a demonstrably safe environment. Once employee trust is won, productivity and social interaction may once again grow.

When asked, 'How often do you expect to work remotely once the majority of people are vaccinated', occupiers said:

	US	UK	AUS
More than once a week	30%	47%	50%
I will work mostly remotely	20%	22%	8%
Once a week	11%	11%	19%
A few times a month	11%	8%	9%
Not often	15%	7%	10%
Never	12%	5%	3%

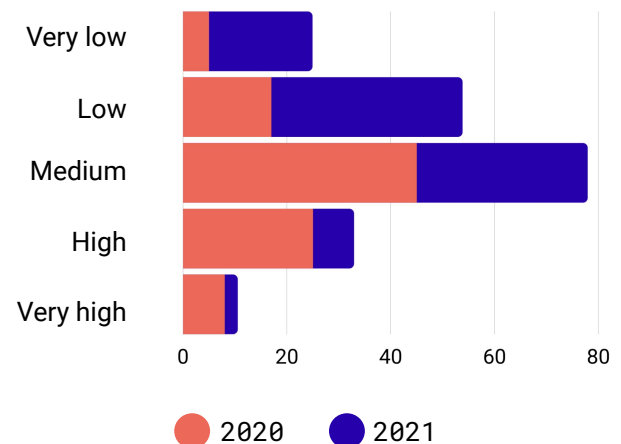
Approximately **70%** of **occupiers expect to work from home once a week** or more once the majority of people are vaccinated, up slightly from **65%** in May 2020. However, the amount of people who will '**never**' work remotely has increased, from **6.5** to **8.7%**.

## Perception and mitigation of personal risk post-vaccination

The many methods of protection against COVID-19 in the office, and the vaccination of most office workers, has shifted the perception of risk compared to May 2020.

The majority of occupiers (**36.8%**) believe they are at **low risk** of contracting COVID-19.

However, just under a **third of occupiers** still believe they are at **medium risk** in a majority-vaccination scenario.



When asked, 'Once the majority of people are vaccinated, what reason will most prompt you to return to the office', occupiers said:

	2020	2021
I'll only return when it is safe, I can be productive at home	60%	34%
I need to separate work and home life by going into the office	19%	10%
I need to separate work and home life by going into the office	8%	12%








## Occupiers expect regular information and guidance from landlords to feel safe enough to return to the office

When asked, **'When everyone returns to work, what information will be important to you'**, occupiers said:

	2020	2021
Up to date information on the number of COVID cases in my building	84%	67%
Expected number of people in the office on a given day	84%	45%
Updates on new procedures in my building (use of facilities, etc)	69%	66%
Up to date information on the number of COVID cases in my city	55%	46%
Updates on cleaning procedures	84%	56%
Up to date information on the number of COVID cases in my company	64%	60%

## The Equiem platform is a central and relied-upon source of information

When asked **what would most improve their remote working lives**, occupiers said:

	2020	2021
 COVID-19 updates about my building, including changes to access procedures	70%	67%
 Medical and government COVID-19 updates	52%	49%
 Good news stories	44%	43%
 Competitions	45%	51%
 Remote working tips and content	38%	36%
 Virtual wellness events	36%	34%
 Virtual social and community events	30%	31%

When asked, **'What is critical to you returning to the office'**, the top three answers of occupiers were:

42%

Only when most people in my country/state/city are vaccinated

34%

Increased cleaning frequency

27%

I don't have any preference



"I love the building's community platform!"

"I'm interested in methods for **increasing well-being.**"

"I really like the **entrepreneur and upskilling posts.**"

"I like the general **fun stuff**, and community news."

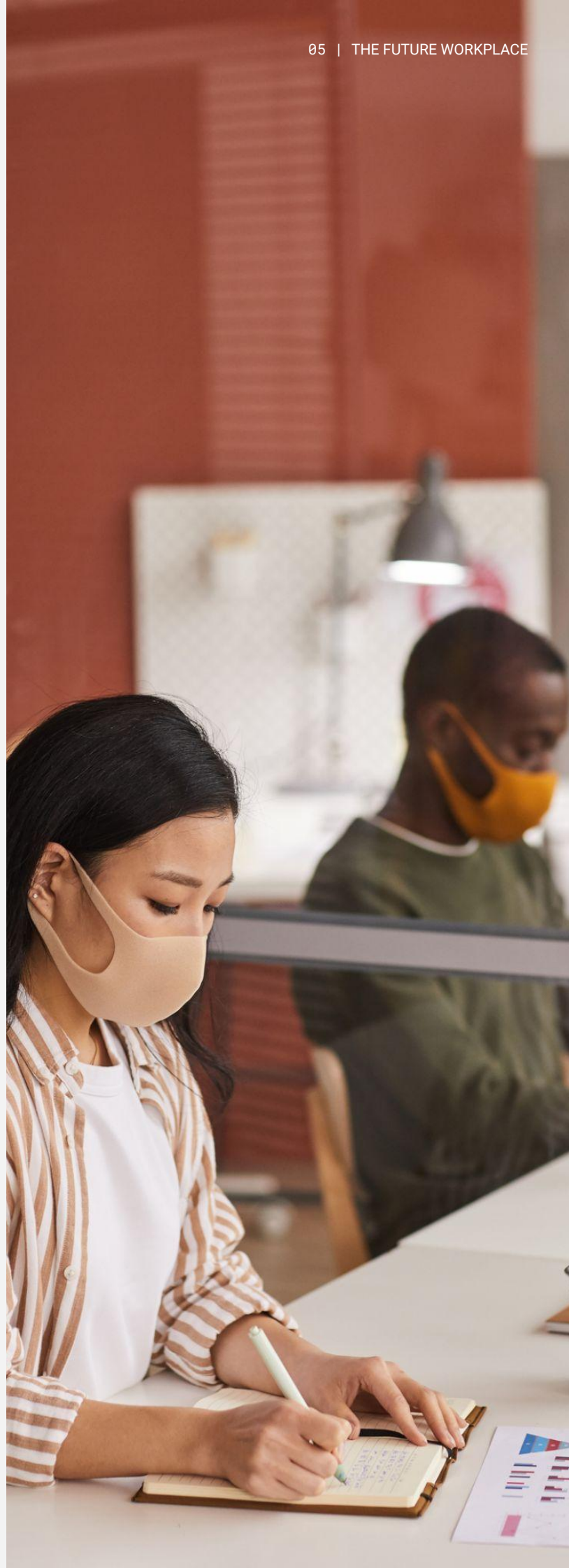
"**Wellness tips**, as well as local infection/vaccination/hospitalization statistics."

# The future workplace: customer wants, needs, and must-haves

For occupiers to consider the **office** as a **viable workplace** equal or **preferable to working from home**, landlords must demonstrate that the office is safe and secure.

By implementing technologies to **improve air quality** and **facilitate social distancing**, occupiers will feel less restricted and inconvenienced by preventative measures. If being in the office is not safe or seen to be safe, the office cannot evolve as a consumer product.

Once this first challenge is met, the path is clearer. Global occupiers have told us exactly what they want from the future, and from their next-generation workplace.



## The future of the office is community

Before technology, before service, before amenity, comes the question of purpose. We want to know: **How do office customers view their product, after COVID-19?**

According to our surveyed occupiers, **the office is a place to/for:**

	GLOBAL	US	UK	APAC
Stay connected to colleagues	73%	66%	77%	87%
Collaboration	71%	67%	70%	81%
Meetings	53%	53%	54%	53%
Meet with clients /secure business	46%	49%	40%	49%
Major project work	38%	40%	34%	41%
Focus and get work done	38%	43%	34%	33%
I don't think the office has a purpose anymore	4%	5%	3%	3%

## Flexibility is everything

Occupiers want community and collaboration, but part of that appeal is choice. For many of our respondents, hybrid models make the workplace into a destination, rather than an obligation – and that distinction is key to fulfilment and productivity.

When asked, '**How should companies handle their office strategy going forward**', occupiers said:

	GLOBAL	US	UK	APAC
Adopt a hybrid model - some days in-office, some remote	58%	52%	63%	68%
It should be handled on a case-by-case basis	20%	22%	18%	16%
There's no need to force anyone to come into an office ever again	17%	19%	17%	13%
Implement a five-day return policy	1%	2%	1%	1%
I'm not sure	4%	6%	2%	2%



## The tech must-haves: Touchless access control, IAQ, flex space, and instant notifications

When asked, 'How can your community platform best support your return?', occupiers said:

54%

Touchless (smartphone) access control

48%

Regular updates and notifications about building policies

25%

Reserving or getting access to shared amenity spaces

32%

Ordering food and services from local retailers

32%

An easy and quick online onboarding guide to re-entering the building

38%

Regular updates on Indoor Air Quality (IAQ)

32%

Information about building occupancy levels

29%

Visitor management software

37%

Accessible flexible space options (e.g. hot desks, offices, conference rooms, shared common areas)

	US	UK	APAC
Touchless access control	53%	47%	66%
Regular updates and notifications about building policies	52%	44%	44%
Regular updates on Indoor Air Quality (IAQ)	38%	39%	36%
Accessible flex space options	31%	46%	40%
An easy and quick online guide to re-entering the building	29%	36%	36%
Information about building occupancy levels	28%	40%	28%
Ordering food and services from local retailers	31%	30%	34%
Visitor management software	27%	26%	38%
Reserving or getting access to shared amenity spaces	24%	27%	23%

"I love the idea of my smartphone giving me access to the building!"



## Another Great Resignation? Maybe not

Whether working from home, a remote office, or their dream workplace destination, it appears that most people are willing to **stay** with their company.

**76%** of occupiers are not considering moving jobs as a result of the pandemic and its long-tail effects

**5.9%**  
say they are

**15.7%**  
are unsure

**2.6%**  
say they  
already have



The deciding factor, as noted above, may be individual **flexibility** over working arrangements.

**47%**  
I am/was just looking  
for something different

**43%**  
The company culture  
has changed/  
disappeared

Globally and in the US, dislike of the office environment was the least-occurring factor influencing the desire to move.

## Zen and the art of workplace maintenance

Putting technology briefly aside, we asked our surveyed occupiers to build their ideal physical spaces.

	GLOBAL	US	UK	APAC
Relaxation zones	50%	45%	53%	55%
Desks spread farther apart across an open floor plan	34%	31%	41%	32%
Workout areas	34%	33%	35%	37%
More breakout areas	33%	22%	46%	43%
More private offices	25%	31%	19%	21%
More meeting rooms/conference spaces	24%	19%	28%	33%
More desks/desk space	22%	16%	31%	24%

## The winning 'what if' is within our grasp

Most of the questions in our survey are designed to gauge sentiment on the office as it is today. However, as a final question, we asked our surveyed occupiers to speculate on what the office could be.

If their workplace was recognised for its excellence, or if it was highly rated (by such scoring systems as the Leesman Index), would these factors draw them from the **convenience of home?**

The answers we received were *unexpected*.

When asked, **'If your office was rated to be one of the best in the world, would that change your opinion about remote working?'**, occupiers said:

**39%** No - working remotely will always be better for me

**33%** Yes - it would make me want to work in the office more often

**29%** Unsure



In Australia, interestingly, the Yesses have it – and convincingly so:

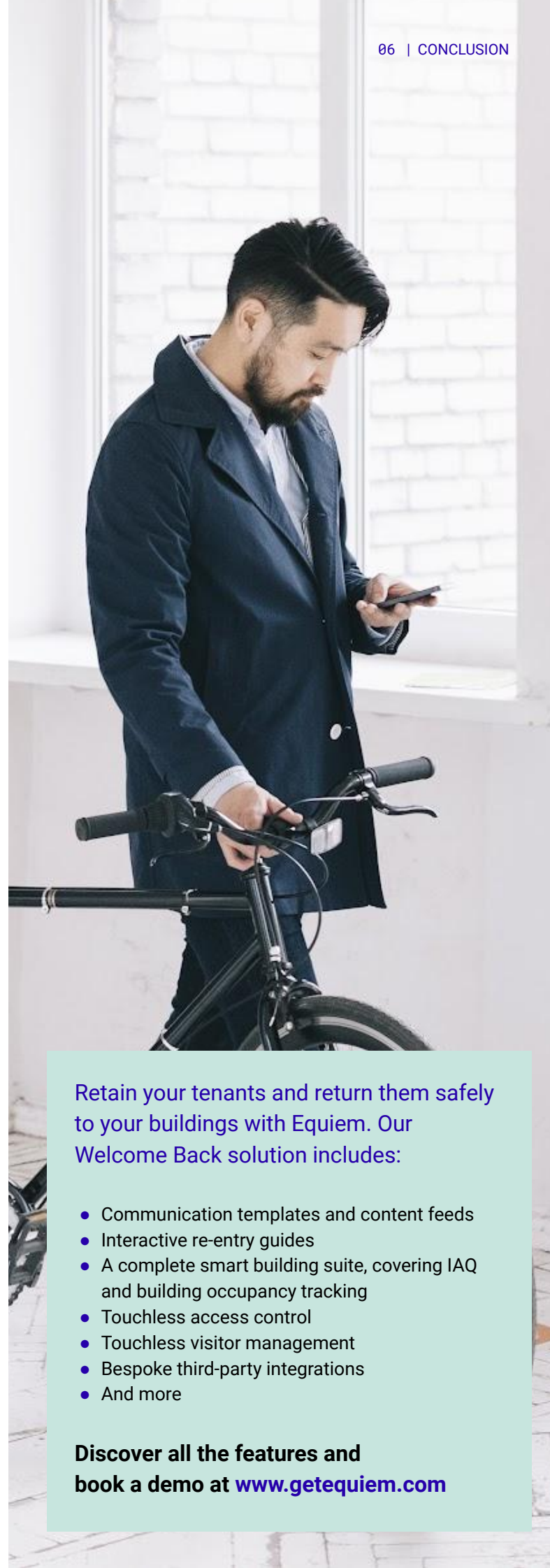
	GLOBAL	US	UK	APAC
Yes	33%	30%	31%	44%
No	39%	38%	43%	33%
Unsure	29%	32%	26%	22%

# Conclusion

A number of occupiers have found, through COVID-19, that **working remotely suits their lifestyle** perfectly. In our survey, this group makes up **38.8% of global respondents**. It is too early to say for sure, but many of them are not likely to come back to work on a regular basis, ever.

This reality presents an opportunity: Just over **55% of our surveyed occupiers** are **open to working in offices** with the **best design** and **most useful technology**. Sole remote workers, therefore, are not the future customers of commercial real estate. Landlords should instead turn their focus on courting occupiers in the Yes and Unsure camps. Those in the latter group, in particular, are likely to be swayed by workplaces that prioritise safety, community, collaboration, and productivity.

We know that touchless access control and IAQ monitoring solutions are in demand. We know that occupiers want relaxation zones, workout areas, and social events. We know that they rely on a single communications platform to successfully navigate working life in their building. And for those working remotely, part of the week, a tenant experience platform is as important as it was in May 2020: It provides interaction, enrichment, and wellbeing, especially to the large numbers of people who are feeling isolated and overworked.



Retain your tenants and return them safely to your buildings with Equiem. Our Welcome Back solution includes:

- Communication templates and content feeds
- Interactive re-entry guides
- A complete smart building suite, covering IAQ and building occupancy tracking
- Touchless access control
- Touchless visitor management
- Bespoke third-party integrations
- And more

Discover all the features and book a demo at [www.getequiem.com](https://www.getequiem.com)

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