



servparc

How Covid-19 is forcing a change in workplaces and workforces'

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Structure for the next 25 min.



- Accessing the current situation
- From re-entry to re-imagination
- Towards “a new normal”
- Q & A Session





Assessing the current situation (a few data points)

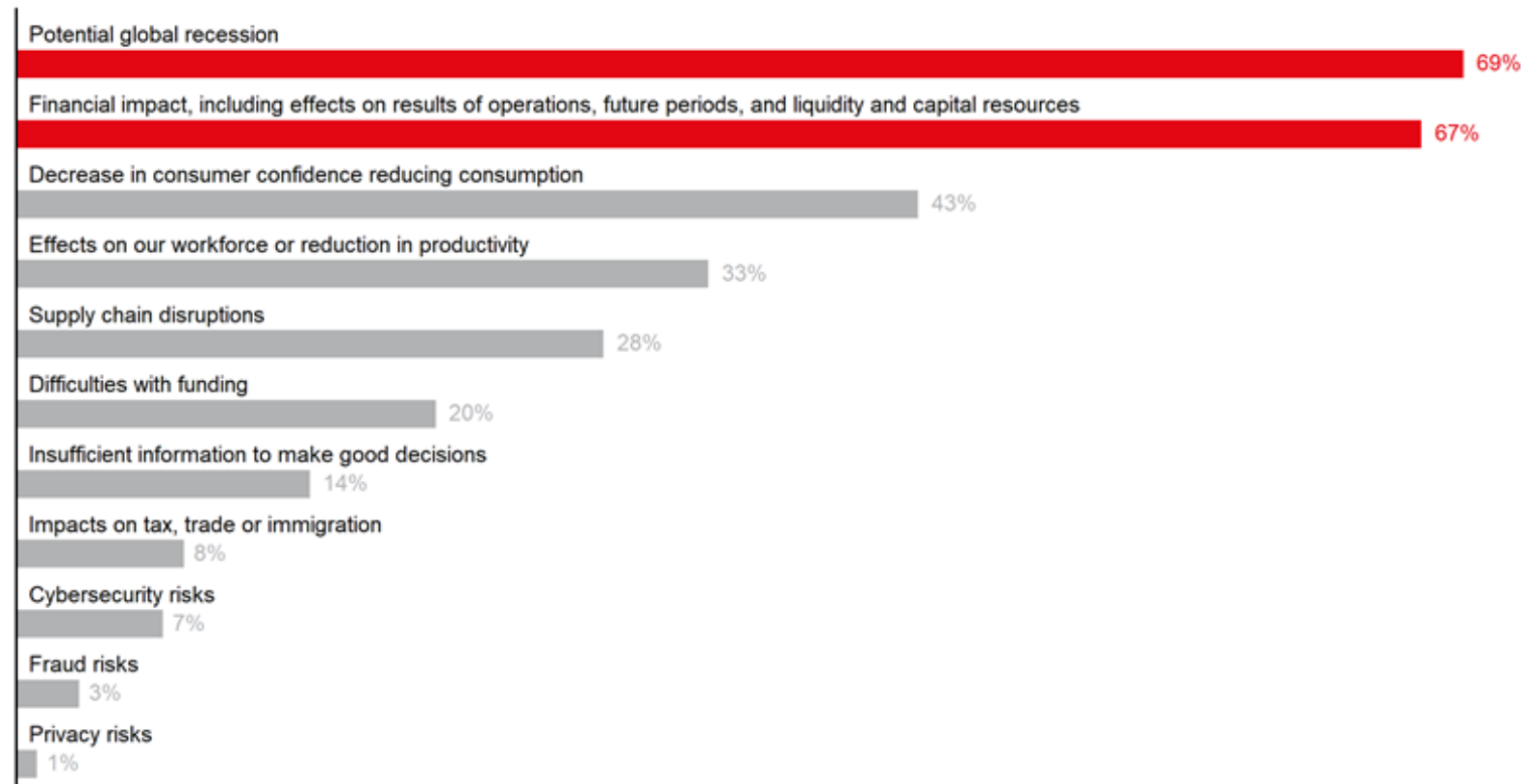


Navigating uncertainty

Global recession and financial impact of COVID-19 key concerns for corporates



What are your top three concerns with respect to COVID-19?



70%
of CFOs globally say that COVID-19 has potential for significant impact to their business operations

Source: PwC, CFO Survey, April 2020

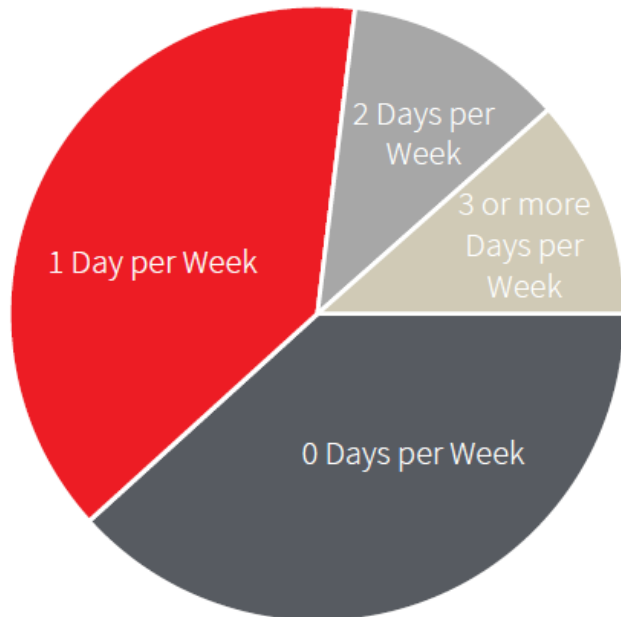
Is working from home (WFH) the new normal?

Post-Covid majority of people want the freedom to choose where they work



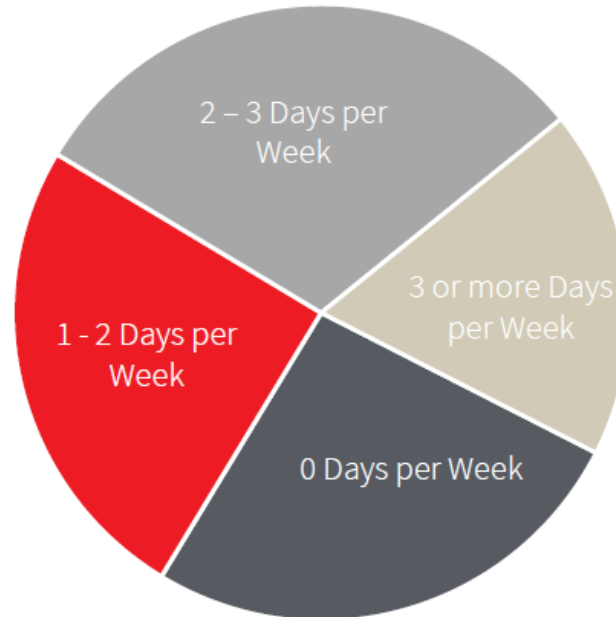
BEFORE COVID

Prior to the COVID-19 outbreak, approximately how many hours per week did you work from home during the normal business work week (8:00 AM - 5:00 PM, Monday - Friday)?



POST COVID

Assuming the public health crisis is mitigated over time, and it is deemed generally safe to return to normal work activities, please rate your sentiment toward home vs. office working:



65%

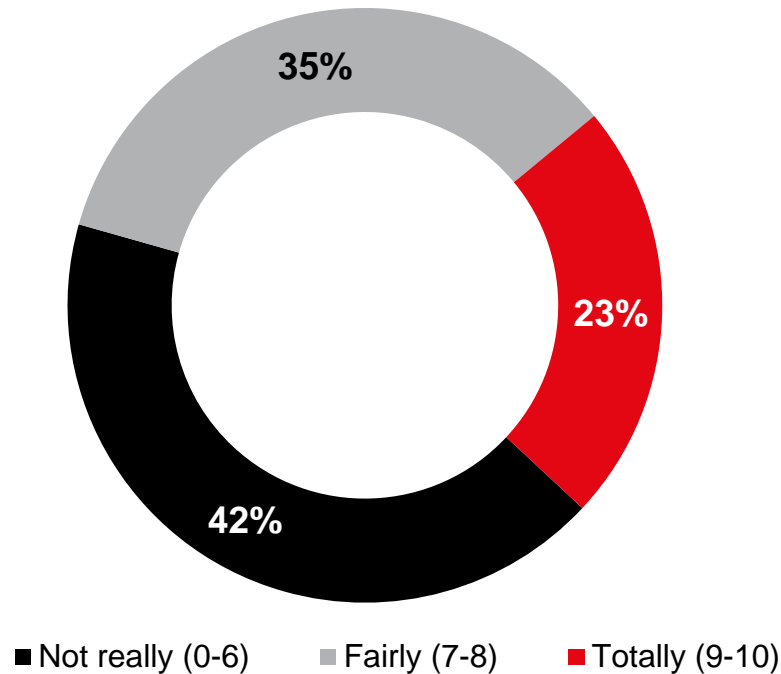
of respondents that Worked from Home 0 Days per week before COVID want to incorporate Work From Home in the future.

Source; JLL Survey May 2020

Globally, the most missed element of the workplace is the human and social aspect of work



Miss working from the office?

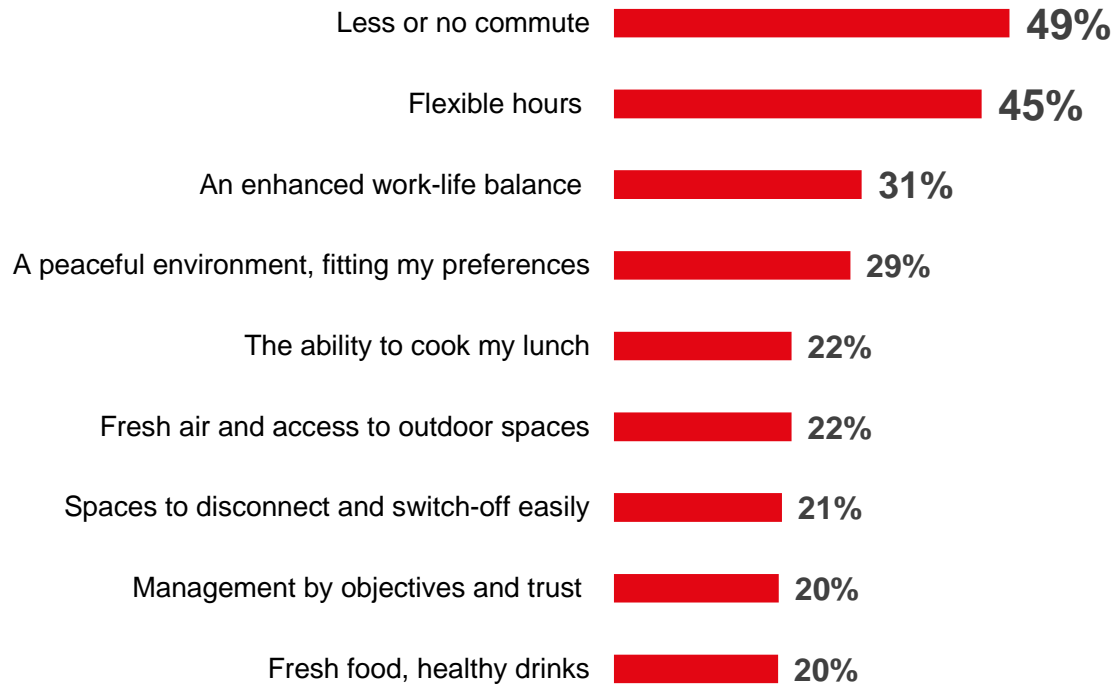


Q26 During your work from home period, what elements of your workplace did you miss the most ?
JLL survey, May 2020

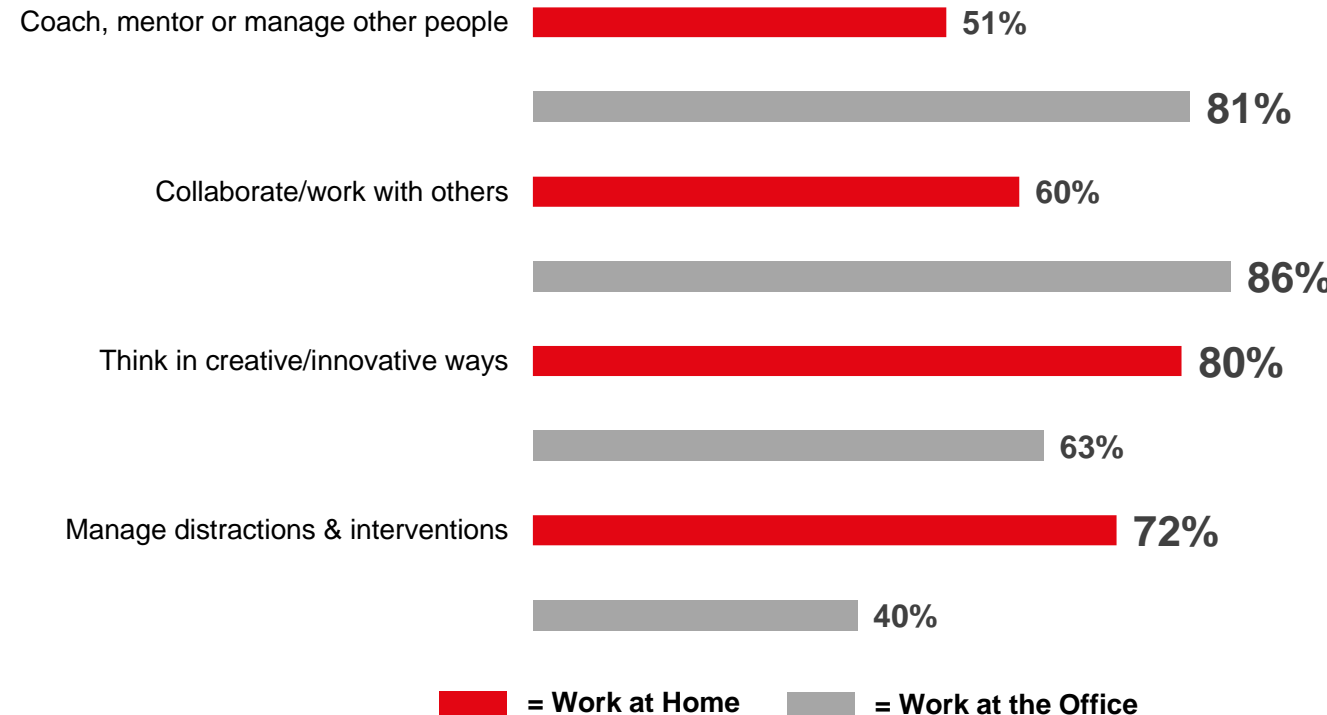
WFH has provided a heightened sense of control over professional and personal life



Enjoyed the most while working from home



Satisfaction with work performance activity



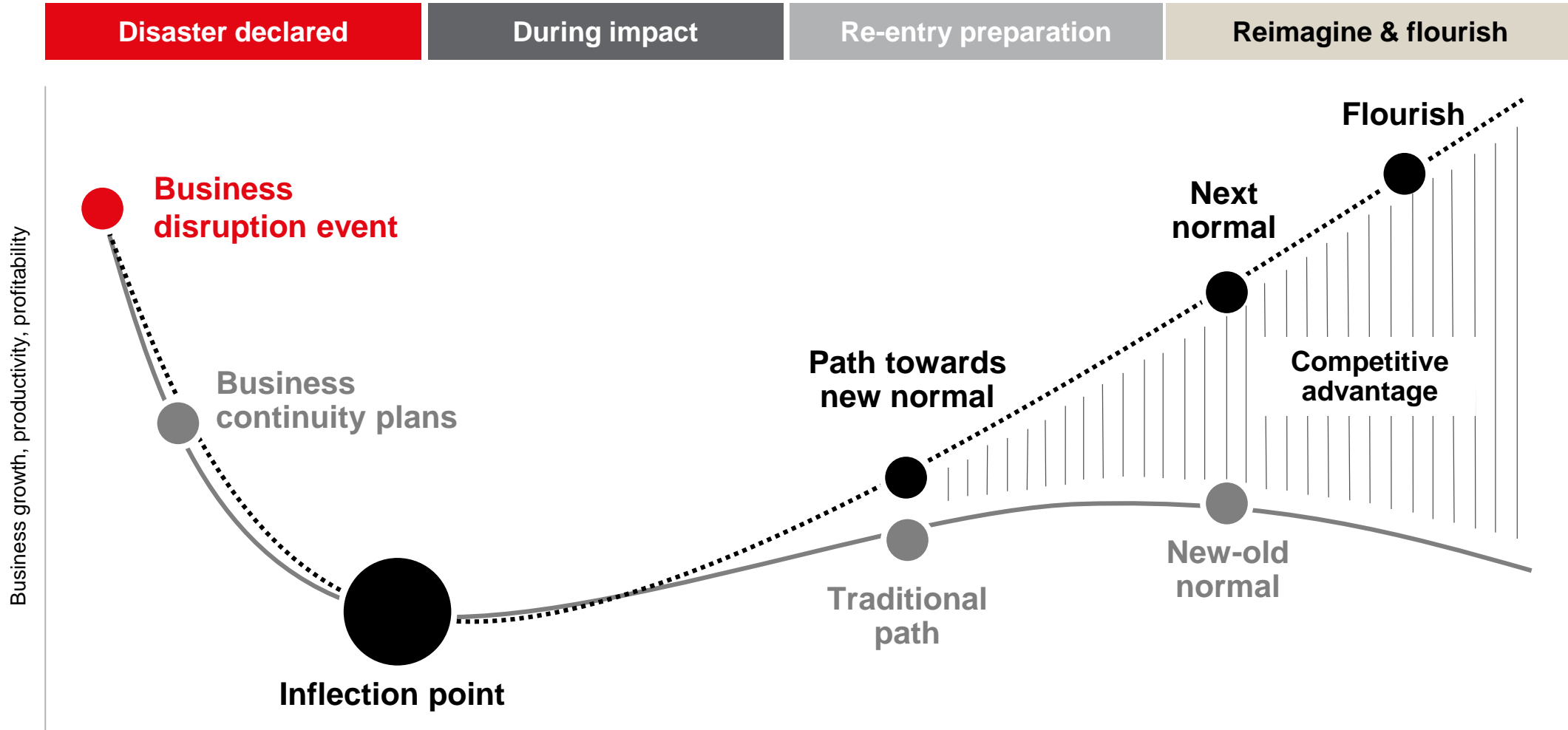
Source; JLL Survey May 2020

IFMA WE – Working from Home survey – May 2020

From *(re)*entry
to *(re)*imagine



Reaching the Inflection Point and the path forward



"Only a crisis – actual or perceived – produces **real change.**"

Milton Friedman, Economist and Nobel Prize
Winner

Key pillars to *(re)entry*

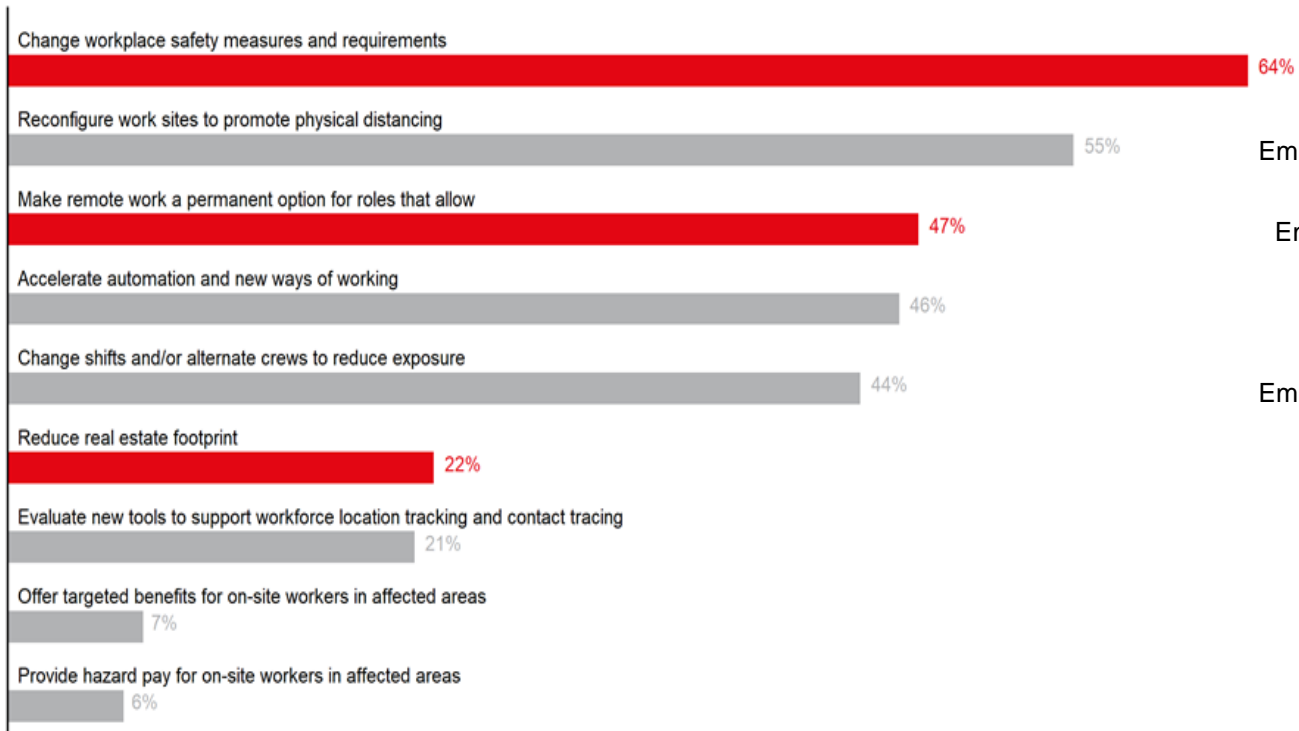


How corporates are approaching re-entry

Workplace policies and shifts towards continuing WFH are key to re-entry



Planning the transition back to on-site work?



Source: PwC, CFO Survey, April 2020

Business as (un)-usual and the challenges faced

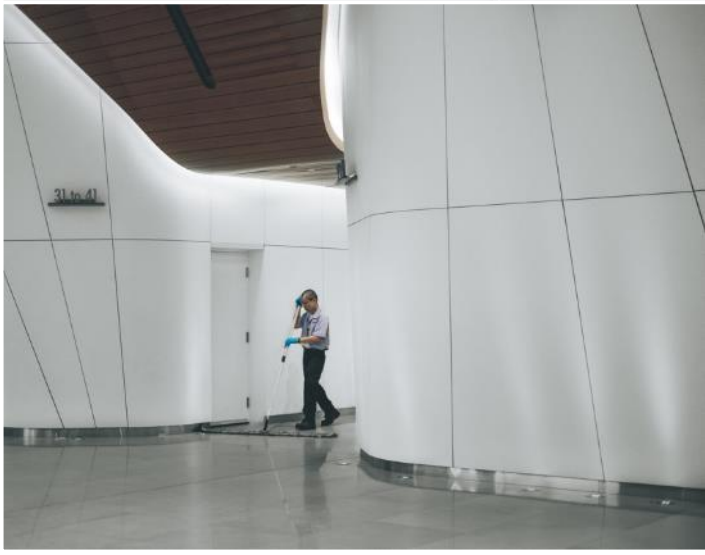


Source: SHRM; How Covid19 is reshaping the Workplace, April ,20



Initiating the
(re)imagination
phase towards
“a new normal”





Short Term Impact

Day 1 back to work will look very different from before and the majority of now normal practices such as social distancing and heightened hygiene are set to remain

Operational priorities

Challenges for workplace teams on an unprecedented scale



Keeping employees, clients and partners safe

- Cleaning & hygiene
- Access & temperature controls
- Social distancing



Ensuring business continuity

- Supply chain disruption
- Office closures
- Travel restrictions
- Large-scale quarantines



Dealing with the financial implications

- Risk of geographic or world-wide recession
- Uncertainty about duration and severity of crisis
- Cost reduction measures

76%

% of millennials that consider a company's social and environmental commitments when deciding where to work

Cone Comms. Millennial Engagement Study 2016

89%

% of employees at companies supporting wellbeing initiatives that are likely to recommend their company

Globeforce Employee Recognition Survey 2018

Situational work styles

The “workplace” should accommodate individual preference on the day



The Office



Co-Working



Public Places



Working from Home





Long Term Impact

As talent pools expand and the location of workers becomes less relevant, the physical office will be seen as an extension of our lives, a place to learn, socialise and connect

As the work from home experience for many becomes as important as the office experience, a shift in culture will be critical

- Managers will become virtual.
 - ✓ Recognising excellence
 - ✓ Encouraging proactivity and personal job crafting
 - ✓ Supporting whole-person growth and
 - ✓ Intentionally building and fostering relationships
- Measure productivity of outcome instead of facetime
- Speed of acceptance of this new norm will vary across regions.

55%

% CEOs that believe lack of trust is a threat to the growth of their organisation

PWC Global Report, 2016

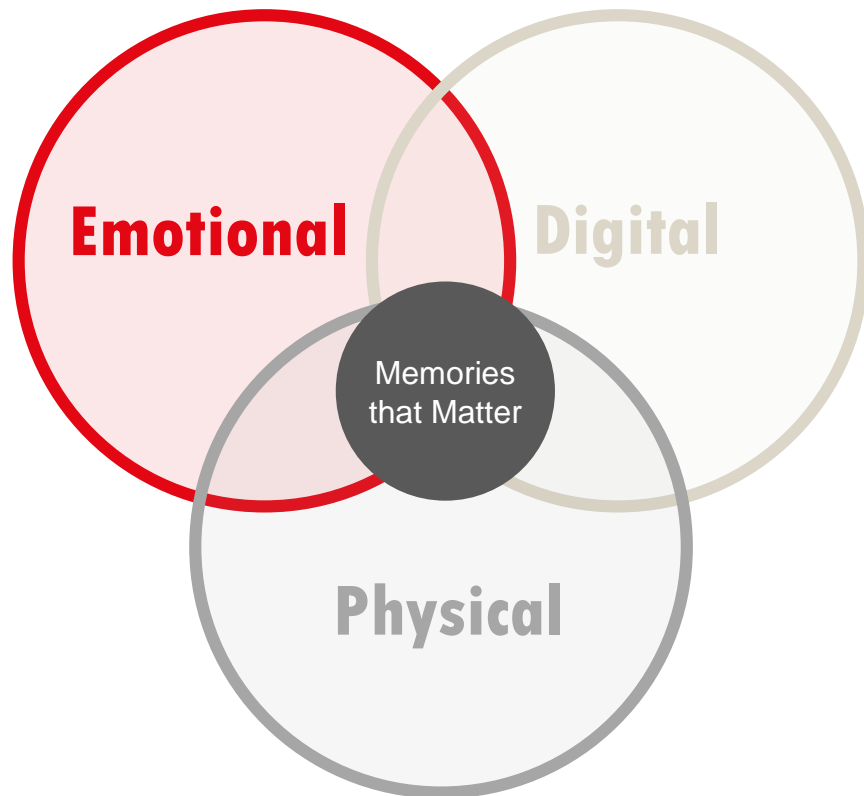
3,000%

% increase in application rates for jobs advertised as remote working friendly

Distribute Consulting Report, 2019

The 'Hub and Club' model will common place

➔ All signs point towards a **diverse future corporate ecosystem** that may include **out of town hubs** offering short individual commutes and **purpose led HQs** supported by **remote working**



The 'Hub and Club' model should provide **sophisticated amenities** across a broad range of price points that merge the boundaries between social life and work life and **create true 'memories that matter'** by spanning emotional, physical and digital dimensions:

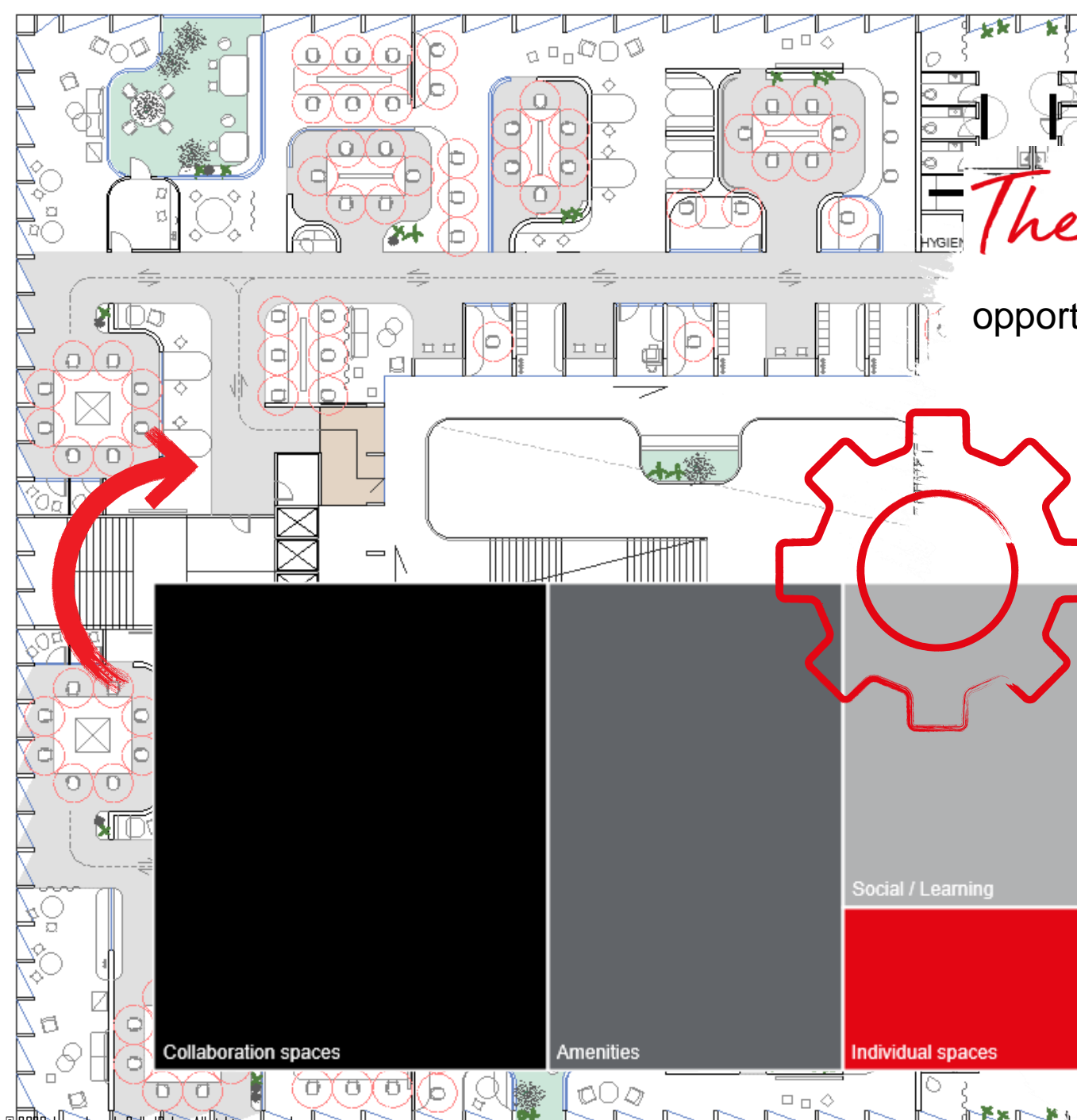
EMOTIONAL: Environments that tap into your senses by how they smell, sound, feel and look

DIGITAL: Environments that are supported with seamless and fully integrated digital ecosystems

PHYSICAL: Environments that deliver the spaces to work, connect, learn and socialise

The workplace of tomorrow

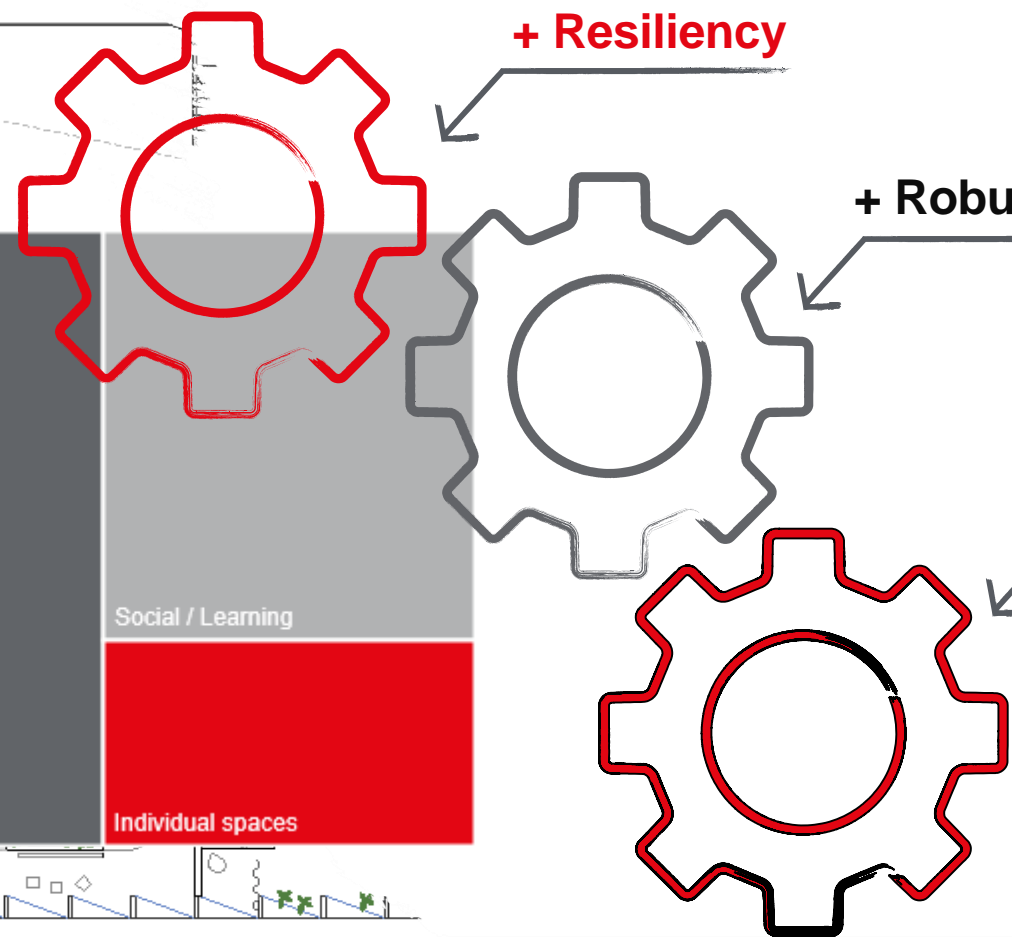
opportunity to shift space take, use and distribution.



+ Resiliency

+ Robust Tech

+ Experience



Q & A

