

*Supplementary information*

**THE COVID-19 PANDEMIC AND OFFICE SPACE DEMAND DYNAMICS**

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Table S1. Knight Frank (Y)OUR SPACE survey structure and questions (source: Knight Frank, 2021)

Survey responses	
Question	Response
Geographical remit of respondents	
	Local / National
	Regional
	Global
To what extent is real estate regarded as a strategic device within your business?	
	Completely
	To some extent
	Not at all
What strategic agenda items does real estate support? (Respondents provide top 3 answers)	
	Corporate brand & image
	Cost reduction
	Employee wellbeing
	Talent attraction & retention
	Increased collaboration
	Operational restructuring & transformation
	Increased innovation
	Diversity & inclusion
	Talent management (education & development)
	ESG
	None
Total space in global portfolio 3 years from now	
	Increase
	Decrease
	Stay the same
... For those increasing or decreasing, the magnitude of change is	
	increase or decrease by more than 20%
	increase or decrease by 10–20%
	increase or decrease by 5–10%
	increase or decrease by less than 5%

Continued of Table S1

Survey responses	
Question	Response
The influence of COVID-19 will	
	Alter our real estate strategy forever
	Will impact real estate strategy over the medium-term
	No significant long-term influence
Cost saving targets	
	No target
	Reduction by 1–5%
	Reduction by 5–10%
	Reduction by more than 10%
	Pro-actively increasing real estate spend
Has your cost saving target increased since the onset of COVID-19?	
	Yes
	No
On reflection, the business experience of home working has been ...	
	Hugely positive
	Positive
	Neutral
	Negative
	Hugely negative
Outlook for next three years in terms of portfolio & workplace dynamics	
	Quality of space occupied
	Density of occupation
	Amount of personal space per person
	Amount of collaborative space
	Average lease length
	Proportion of portfolio that is owned
	Proportion of portfolio in CBD locations
	Proportion of portfolio in suburban locations
	Desk-sharing & hot-desking
	Amenities provided within our workplace
	Use of data to make real estate & workplace decisions
Proportion of global portfolio that is in serviced / managed or co-working space	
	Less than 5%
	5–20%
	20–50%
	More than 50%
Likelihood of moving HQ facilities within the next 3 years	
	Will definitely happen
	Very likely to happen
	Fairly likely to happen
	Fairly unlikely to happen
	Very unlikely to happen
	No chance it will happen

Continued of Table S1

Survey responses	
Question	Response
Key drivers of relocation activity (more than one response permitted)	<ul style="list-style-type: none"> <li>Cost savings achieved</li> <li>Change of workstyle influencing quantum and quality of space required</li> <li>Business restructuring</li> <li>Business transformation</li> <li>Access to a different talent pool</li> <li>Access to collaborators / external knowledge</li> <li>Other</li> </ul>
Will you be making significant changes to your desk to person ratio in the next 3 years?	<ul style="list-style-type: none"> <li>Yes – increasing desk to person ratio</li> <li>Yes – decreasing desk to person ratio</li> <li>No change</li> </ul>
What level of desk sharing ratio (desk to person) would you anticipate 3 years from now?	<ul style="list-style-type: none"> <li>90%</li> <li>80%</li> <li>70%</li> <li>60%</li> <li>50%</li> <li>Less than 50%</li> </ul>
What services / amenities do you think your staff will demand from their buildings over the next 3 years?	<ul style="list-style-type: none"> <li>Food &amp; beverage offer</li> <li>Gym facilities</li> <li>Cycle storage &amp; facilities</li> <li>Facilities supporting mental health (e.g. sanctuary spaces)</li> <li>Drop &amp; collect parcel facilities</li> <li>Healthcare facilities</li> <li>Concierge</li> <li>Free food &amp; drink</li> <li>Childcare facilities</li> <li>Education programmes &amp; facilities</li> <li>Others</li> </ul>
Others specified	<ul style="list-style-type: none"> <li>Car Parking (×4)</li> <li>Social &amp; chill out spaces</li> <li>EV parking &amp; charging (×2)</li> <li>High levels of hygiene (supported by data)</li> <li>Conference facilities</li> <li>Biophilic screens</li> <li>Collaborative areas (inc digital integration)</li> <li>Changing rooms &amp; showers</li> <li>Agile storage</li> <li>Task based work settings</li> <li>Focused spaces</li> <li>Lockers for storage</li> <li>Drop down areas</li> </ul>

Continued of Table S1

Survey responses	
Question	Response
Does your business have a stated net zero carbon emissions target?	Yes
	No
	Don't know
If yes, when is the target date?	By 2030
	By 2040
	By 2050
To what extent do you believe your organisations commitment to becoming net zero carbon will change your real estate choices?	To a great extent
	To a moderate extent
	To a small extent
	Not at all
How influential will sustainability considerations be in determining your real estate portfolio & strategy over the next 3 years?	The key influence
	Somewhat influential
	No influence
Is there clear recognition within your business that occupying and utilising real estate differently is a key contributor to achieving these targets?	Completely
	To some degree
	Not at all
How much of your current global portfolio would you regard as green or sustainable real estate?	Less than 10%
	10–25%
	25–50%
	50%+
What proportion of your global portfolio has an environmental accreditation (BREEAM, LEED, DGNB, Green Star, CASBEE, etc.)?	Less than 10%
	10–25%
	25–50%
	50%+
Do you have a clear target in place to increase the proportion of your portfolio that has an environmental accreditation?	Yes
	No
	Unsure
What do you regard as the main benefits of occupying “green” accredited real estate? (Top 3 choices made, all responses recorded)	Supports ESG strategy including net zero carbon targets
	Enhances our brand
	Improved attractiveness to clients / customers
	Supports CSR strategy
	Cost savings
	Improved ability to attract / retain staff
	Regulatory compliance
	Other

End of Table S1

Survey responses	
Question	Response
Which stakeholder group is / will be most influential in driving your business towards sustainable real estate?	All stakeholders
	Leadership
	Customers
	Investors
	Staff
	None
	Suppliers
Since the outbreak of the COVID-19 pandemic, how would you rate the frequency of your engagement and dialogue with your landlord(s)?	Increased significantly
	Increased slightly
	No change
	Reduced slightly
	Reduced significantly
What do you expect your landlords to do to make your workplace safer going forwards?	More rigorous / frequent building cleaning regimes
	Less physical touchpoints / use of contactless entry systems
	More regular change / maintenance of HVAC systems
	Temperature scanning of building occupants
	Better / more regular dialogue and engagement
	Contactless rest rooms
	Use of new materials / cleaning overlays that are COVID-19 safe
	Facial recognition technology
	Nothing. It is our responsibility.
What is your greatest frustration as a customer in global real estate markets (only one allowed)?	Inability to offer flexibility
	Lack of innovation in product / service offering
	None
	Poor service delivery
	Lack of meaningful and regular dialogue
	Lack of understanding about us and our business
	Other