



THE SUN LIFE INVESTMENT MANAGEMENT GROUP OF COMPANIES



Welcome to One York



Workplace Beyond 2021

Designing spaces that bring us back to a new degree of normalcy



Global Survey

▬ 20% expect no change to their square footage requirements.

↓ 59% said they expect their office footprints to shrink.

- 36% expect to decrease their square footage by 10% to 30% in the next two years.
- 12% expect to reduce their space by a whopping 30% or more
- 12% say space usage will drop by 10% or less.

↑ Only 4% expect to expand their space by more than 30%

- 10% expect to grow their footprint by 10% to 30%
- 7% expect their increase of space usage to come in under 10%

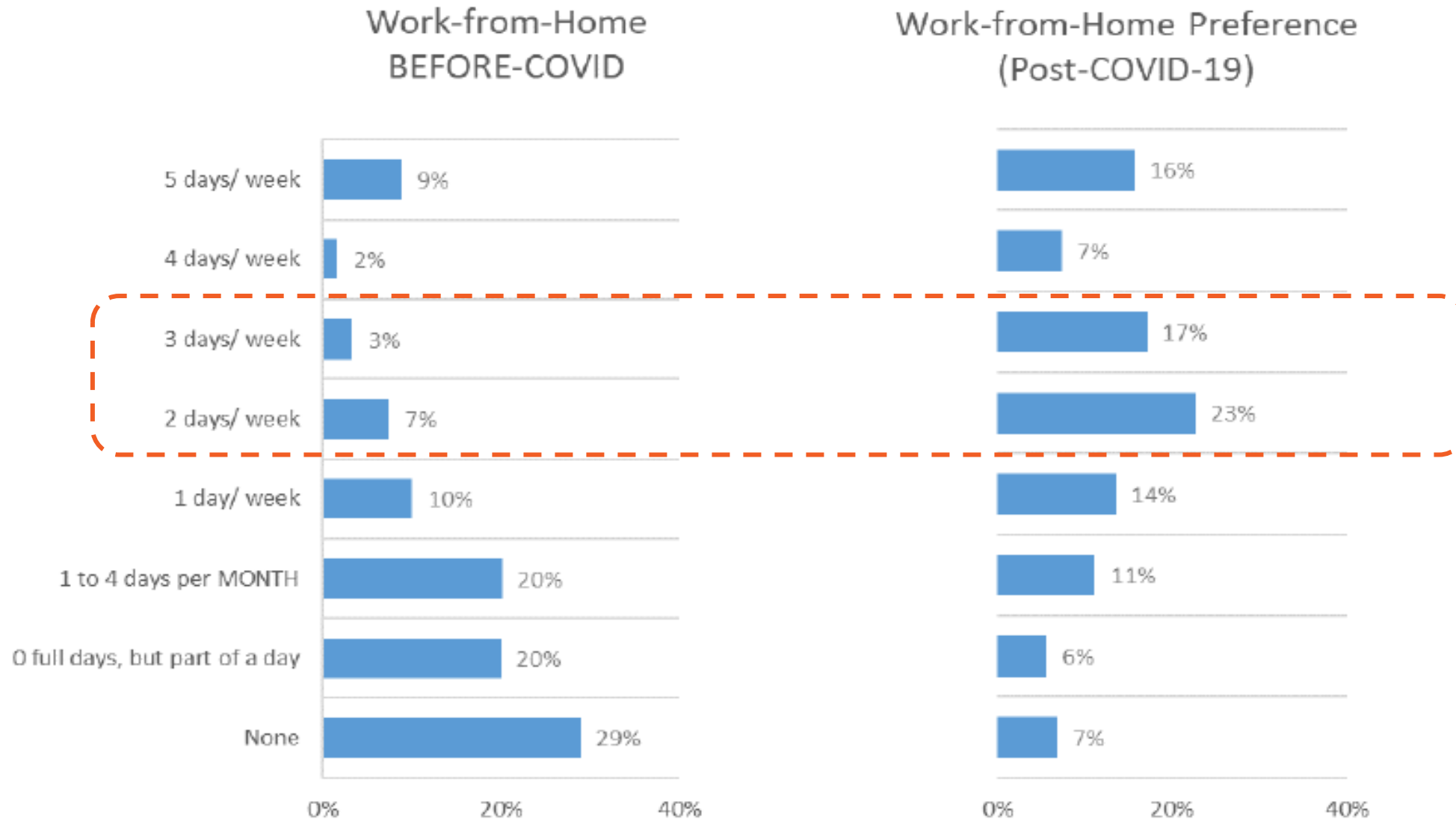
▬ 53% intend to keep coworking space at current levels post-pandemic

- 30% of respondents expect to increase their coworking usage post-pandemic.
- 16% expect to decrease their coworking usage.

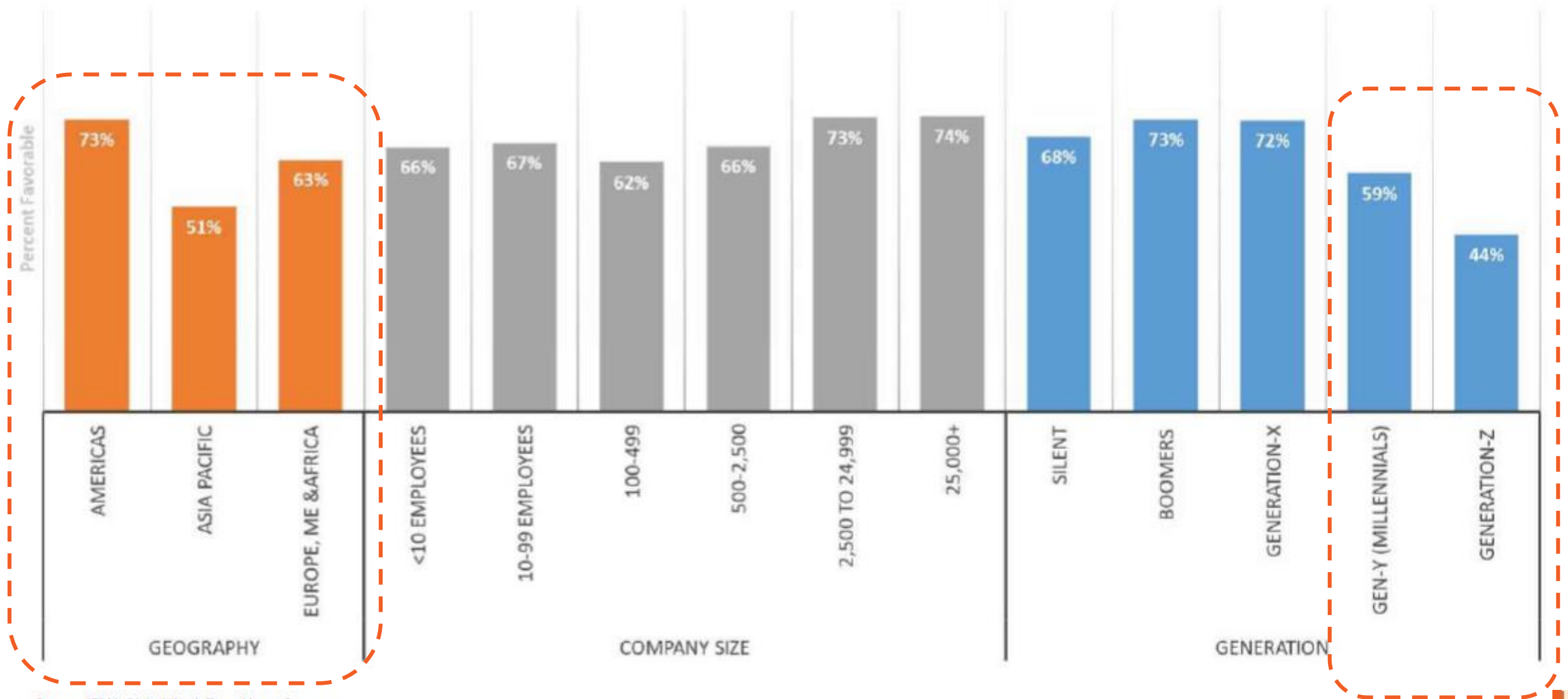
⊕ 46% of the work week will be spent in a traditional office setting

- 43% spent at home or in a remote location
- 16% expect to open satellite locations closer to where their employees live.
- 11% in a coworking environment.

WORKING FROM HOME?



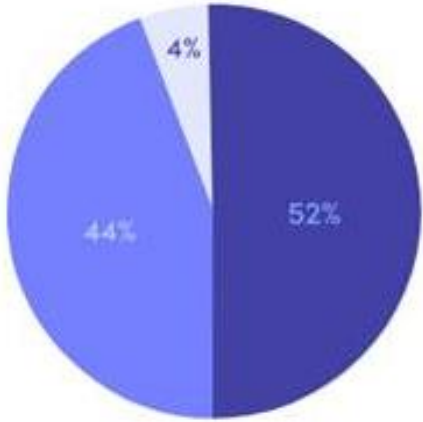
HAS WORKING REMOTELY BEEN SUCCESSFUL?



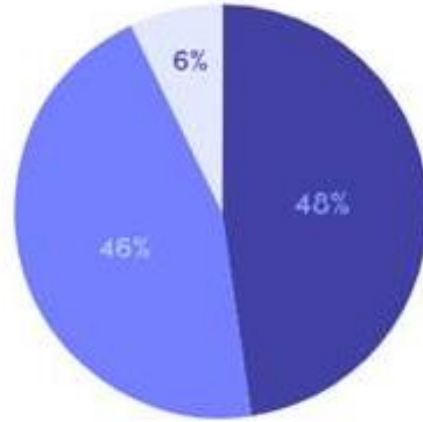
Source: IFMA Global Work From Home Survey

GENERATIONAL PREFERENCE

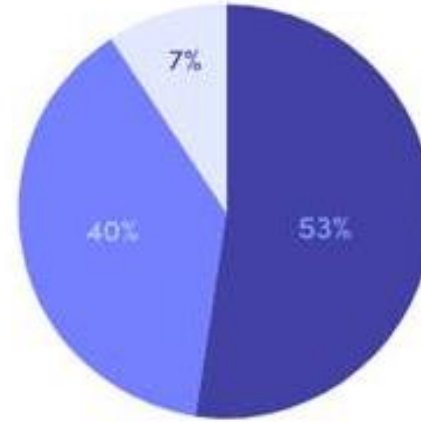
Fully on-site Hybrid Fully remote



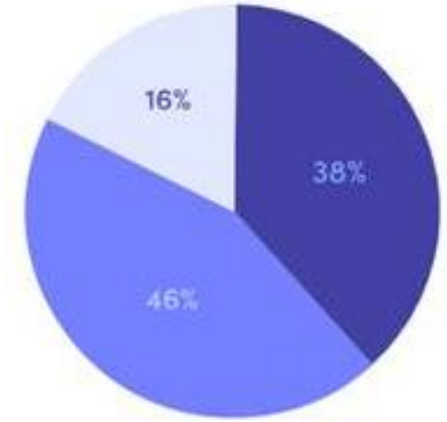
Gen Z



Millennials



Gen X



Boomers

<6%

The lowest preference for full time remote work

53%

The highest preference for hybrid work

16%

The highest preference for remote work

Aha Moment:

The notion of “returning to the office” is flawed.

We need to acknowledge the things that weren't working before COVID-19 and instead of returning to them, address them as we move forward.

We need to evolve beyond the notion of “an office” to

“reimagining an ecosystem”

of spaces that truly addresses our needs - now and in the future.

Minding the Gaps: Why it Matters Now More than Ever

Let's acknowledge the factors that we need to address more holistically going forward and why we need to look beyond **“returning to *the* office.”**



Stress, Burnout
And Wellbeing



Climate Change +
Environmental Sustainability



Under-utilized,
Inflexible Space



Social Inequity



Cleanliness



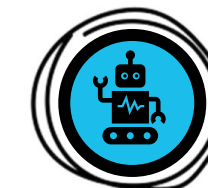
Liquid Workforce:
Retrain + Upskill



Shift From Productivity to
Innovation



Desire to Be Socially
Connected Yet Safe



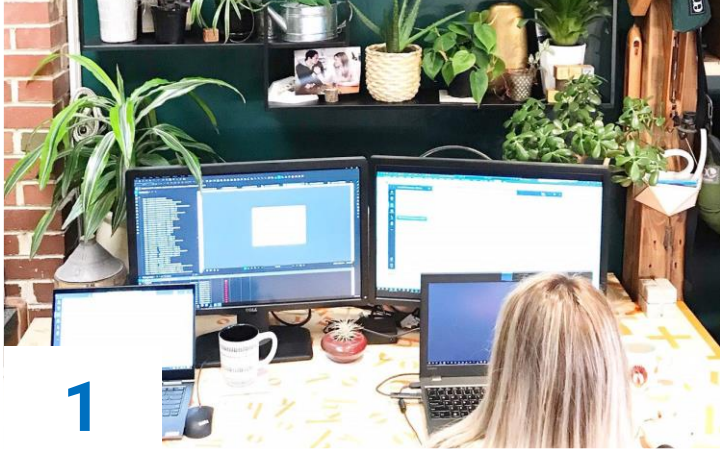
Rapid evolution of
technology

Key Findings



1. Returning to **the office of yesterday is not the answer.**
2. We need a new system where “the office” is replaced with an **ecosystem of spaces.**
3. We need to **empower people with options and choices** designed to fit today’s needs.
4. We need to **shift from fixed to fluid** and create environments agile enough to meet our needs as they evolve.
5. We need to **rethink the purpose of place** and create compelling environments that provide purpose to entice people to be present.
6. Design space as a destination
7. **Access is the new ownership.** If you don’t need to own it, then don’t. Consider leveraging the community, shared economy or emerging membership model to meet your needs. Think about large conference and training needs, technology, amenities and your furniture needs.
8. We need to **leverage technology** more effectively to enable better user experiences, control, reduce touchpoint and create more responsive spaces that cater to individuals rather than forcing people to adapt to space.

COVID-19 LASTING INFLUENCES



1

Increased remote work programs



2

More choice, spacing, unassigned work points



3

Enhanced lobbies for transition



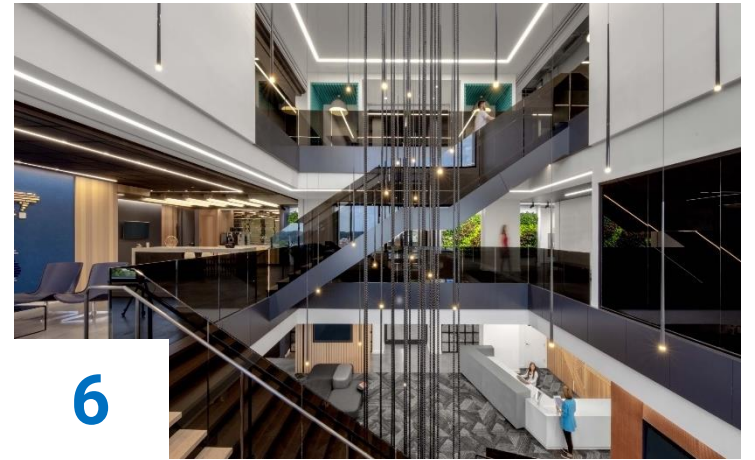
4

Shielding | Boundaries | Dividers



5

More storage space - personal and supplies



6

Enhanced HVAC Systems, Enhanced filtration and air exchanges

LASTING INFLUENCES

Adjust lighting & shades

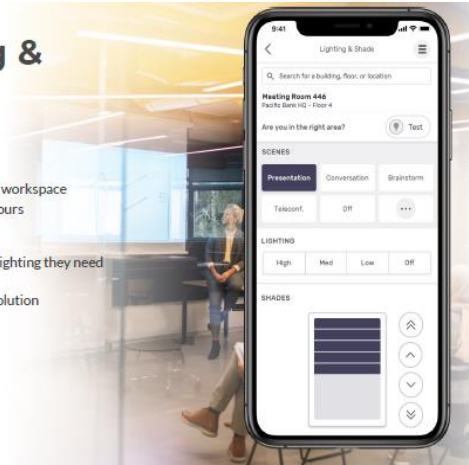
App features:

- Adjust lighting and shades throughout a workspace
- Adjust the schedule when working off hours

Value delivered:

- Provide employees the ability to adjust lighting they need to do their best work
- Save money on an after-hours lighting solution

7

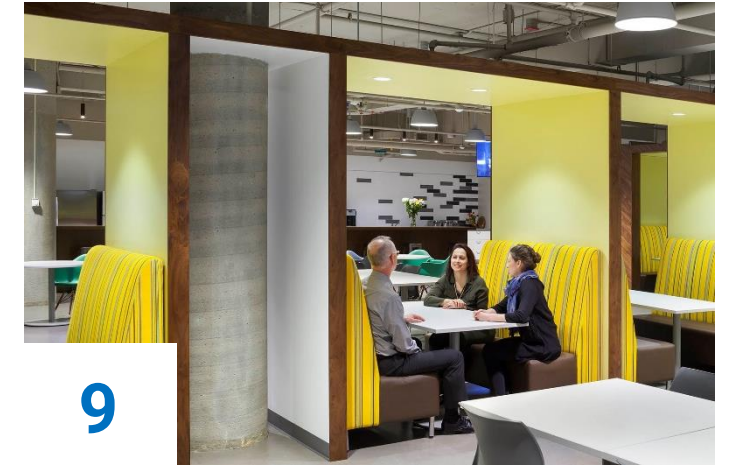


Increased use of technology to reduce touchpoints



8

Reworked restrooms



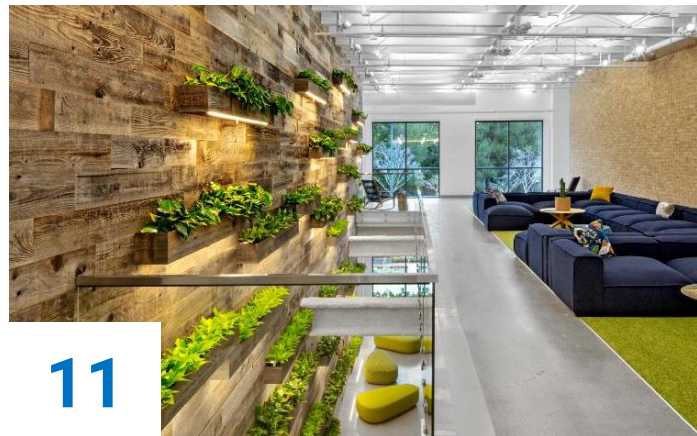
9

Variation of meeting spaces



10

Increased handwashing capacity



11

Controlled spaces for visitors



12

Minimalism