

# actineo

Monitoring Quality of life at work

## WORKSPACES IN MAJOR CITIES

WHERE & HOW  
WILL WE WORK  
IN THE POST COVID  
WORLD?

Presentation April 2, 2021

In partnership with **MAISON&OBJET**



sociovision  
MASTERING A CHANGING WORLD

© SOCIOVISION for ACTINEO



## A SURVEY OF 5 MAJOR METROPOLITAN AREAS

PARIS  
AREA



**12M people**  
≈19%  
of French population

GREATER  
LONDON



**9.3M people**  
≈ 13.4%  
of UK population

AMSTERDAM  
ROTTERDAM  
THE HAGUE



(≈ the Randstad)  
**7.5M people**  
≈ 2/5 of Netherlands  
population

SAN FRANCISCO  
BAY AREA  
+ SEATTLE



**11.2M people**  
'GAFA' land

SINGAPORE



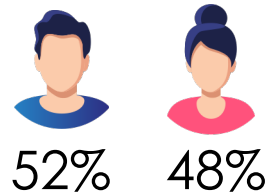
**5.7M people**

In each area, we interviewed **600 people** currently working

Focus on respondents **currently working in an office** (at least occasionally)  
(= **2,628 respondents** = from 88% to 94% of total sample)



## A FEW WORDS ON THE SAMPLE



19 – 25 yo old	9
26 – 35 yo old	27
36 – 45 yo old	31
46 – 55 yo old	21
56 – 65 yo old	12
Over 65	0

36% <35 yo

33% >46 yo

### % COMPANY SIZE

(total)

Fewer than 10 employees	7,0
10-49 employees	12,4
50-99 employees	11,7
100-249 employees	16,6
250-999 employees	21,2
Over 1,000 employees	31,0

48%  
< 250



### % SECTOR OF ACTIVITY

<b>Service</b>	<b>42,6</b>
Public administration	16,3
Industry	16,3
Commerce	12,6
Construction and Public Works	7,3
Transport	4,8



(where respondent works when on company premises)

Fewer than 10 employees	12,4
10-49 employees	18,9
50-99 employees	16,1
100-249 employees	19,0
250-999 employees	18,3
Over 1,000 employees	15,3

66%  
< 250

## A FEW WORDS ON **DIFFERENCES** BETWEEN AREAS

PARIS  
AREA



GREATER  
LONDON



AMSTERDAM  
ROTTERDAM  
THE HAGUE



SAN FRANCISCO  
BAY AREA  
+ SEATTLE



SINGAPORE



- More **full-time**/employees
- More working for a **large company** (>1,000 empl)
- Fewer managers

- More **permanent contract** employees
- More working in **Public Administration**

- More **part-time** employees
- More **younger** employees  
fewer 26 yo old
- More working in **Public Administration**

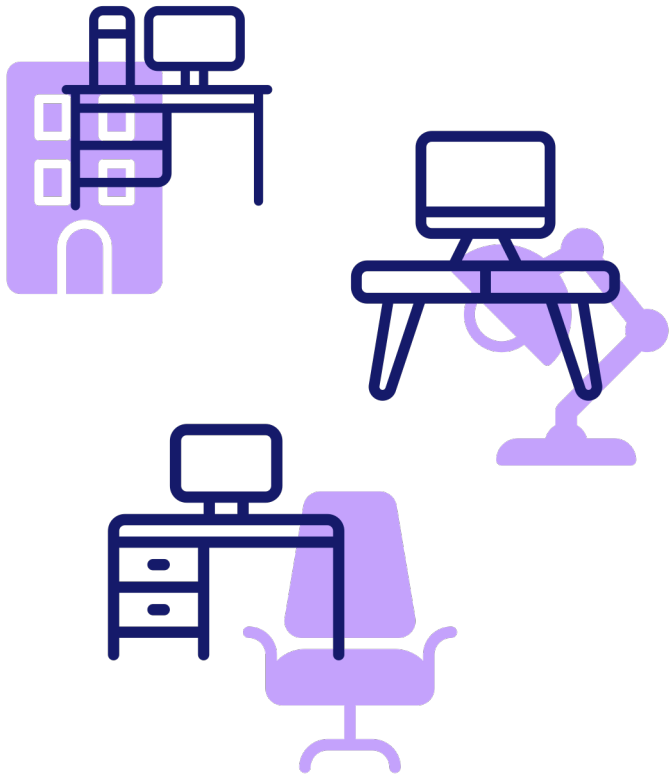
- More **self-employed**
- More **managers**
- More working in the **Service Sector**

- More **managers**
- More working in the **Industry sector** and **Construction and Public Works sector**

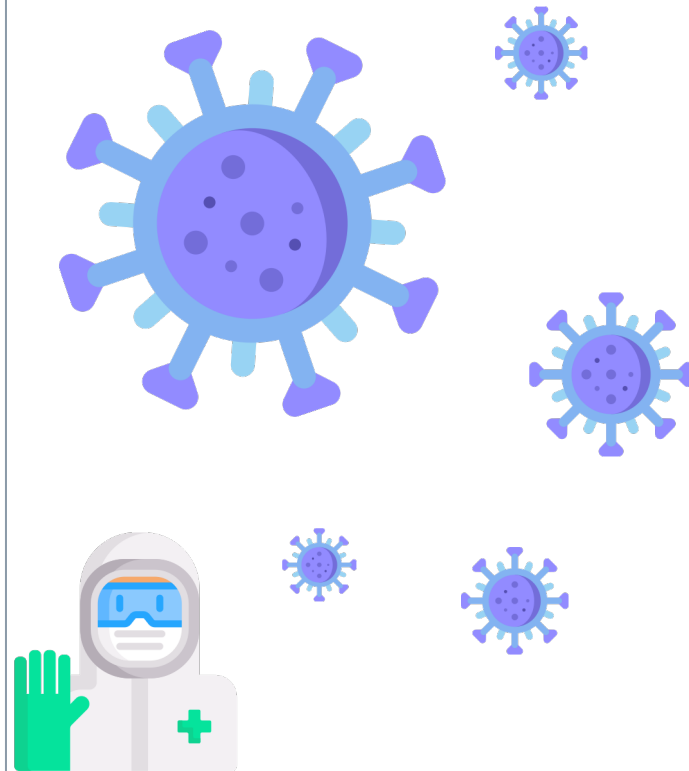


## THE SURVEY ADDRESSES 3 KEY QUESTIONS

WHAT ARE WORKSPACES  
LIKE **TODAY**?



WHAT IS THE IMPACT  
OF **COVID**?

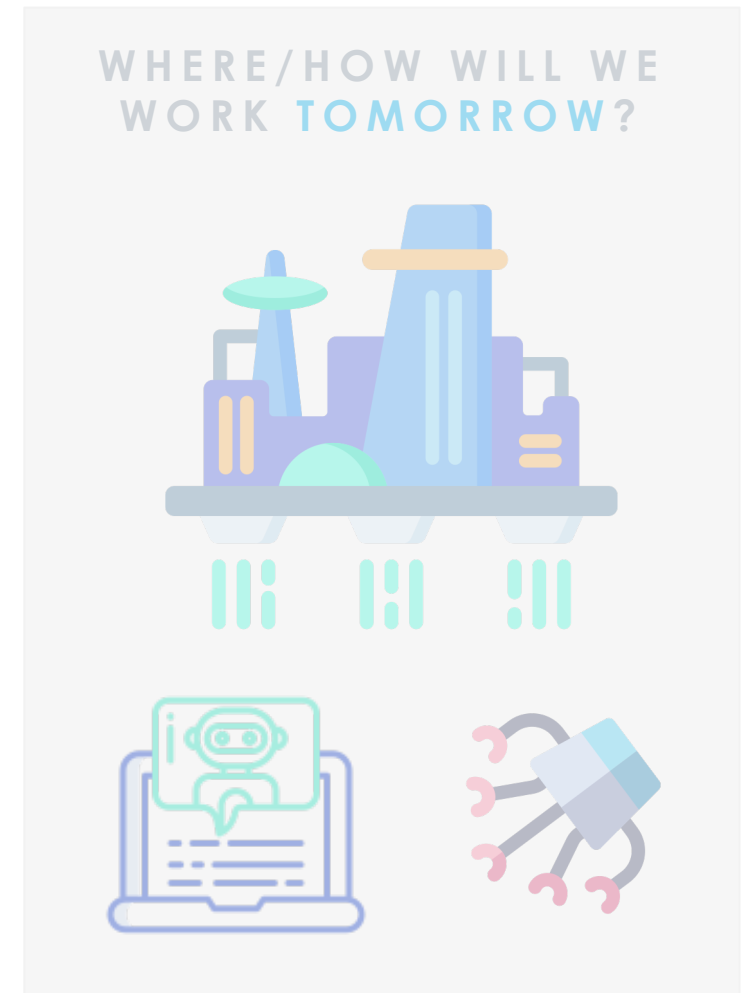
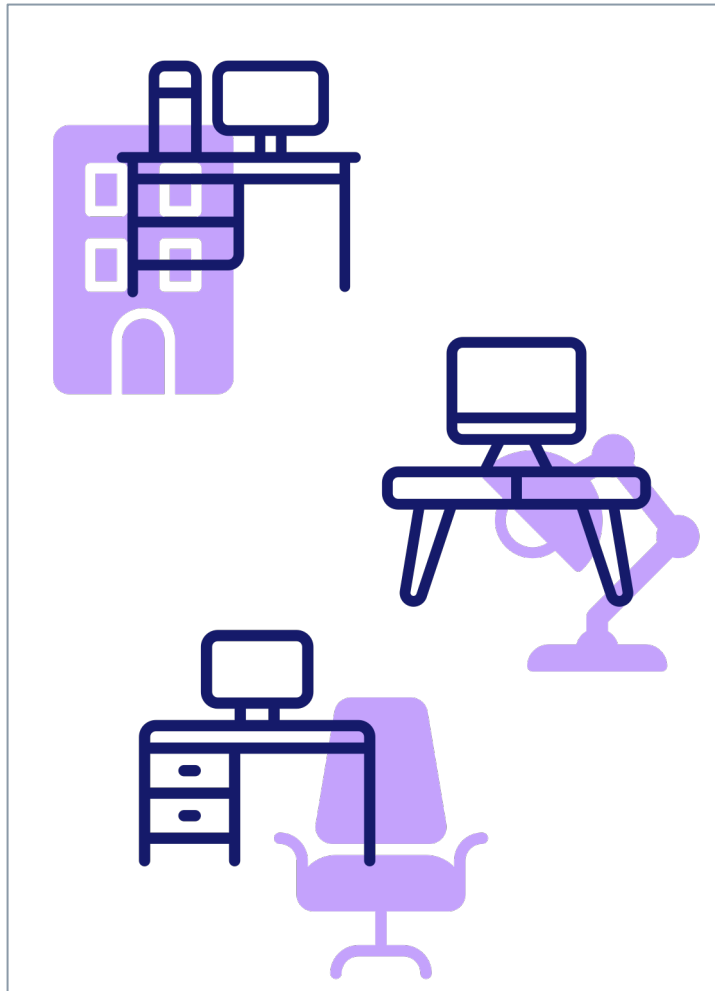


WHERE/HOW WILL WE  
WORK **TOMORROW**?



## KEY QUESTION #1

### WHAT ARE WORKSPACES LIKE TODAY?





# THE ENCLOSED OFFICE IS STILL ALIVE!

When you work in the premises  
of your company or organisation,  
where do you usually work?

OPEN  
OFFICE

51%

38% of respondents  
VERY SATISFIED with  
their quality of life at  
work  
work in an open office

Singapore 60%  
Intermediate profession 63%

26%

OPEN  
COLLECTIVE SPACE  
> 10 PEOPLE

London 34%  
Singapore 33%

25%

OPEN  
COLLECTIVE SPACE  
< 10 PEOPLE

Amsterdam/Rotterdam/  
The Hague 30%

ENCLOSED  
OFFICE

49%

62% of respondents  
VERY SATISFIED with  
their quality of life at  
work  
work in an enclosed  
office

San Francisco/Seattle 57%  
Paris 53%  
Managers 56%

25%

SHARED  
BY AT LEAST 2 PEOPLE

Amsterdam/Rotterdam/  
The Hague 32%  
Paris 29%

24%

INDIVIDUAL

San Francisco/  
Seattle 39%



## FLEX OFFICE ARE A REALITY

# 17%

of respondents  
**DO NOT HAVE  
AN ALLOCATED WORKSTATION**  
at the premises where they usually work

**Amsterdam/Rotterdam/The Hague 30%**

**San Francisco/Seattle 11%**

**Singapore 10%**

**>1,000 employees 22%**

**27% of respondents VERY DISSATISFIED  
with their quality of life at work  
DO NOT HAVE AN ALLOCATED  
WORKSTATION**



# 1/3 OF EMPLOYEES **ALREADY WORK AWAY** FROM THE OFFICE

Do you work at the following locations AT LEAST ONCE A MONTH?



## COMPANY PREMISES

**75%**  
OWN COMPANY  
**Paris 85%**  
**London 80%**

**16%**  
CLIENTS' COMPANY



**32%**

**Amsterdam/Rotterdam/  
The Hague 39%**  
**Paris 38%**  
**London 27%**  
**Singapore 26%**

## HOME

**19%**  
AT LEAST 1 DAY

**Paris 26%**  
**London 16%**

**19%**  
AT LEAST A FEW HOURS  
**San Francisco/  
Seattle 23%**  
**London 15%**



**32%**

**Amsterdam/  
Rotterdam/  
The Hague 37%**  
**Singapore 27%**

## ELSEWHERE

**14%**  
COLLABORATIVE  
WORKSPACES

**14%**  
PUBLIC AREAS  
(CAFÉS, ETC.)

**12%**  
TRAINS,  
PLANES, ETC.

**10%**  
PARKS,  
GARDENS, ETC.

# MOST EMPLOYEES ARE FAIRLY SATISFIED WITH THEIR WORK ENVIRONMENT



My place(s) of work  
is (are) well **suited to my needs**

87%  
TOTAL AGREE

29%  
STRONGLY AGREE

San Francisco/Seattle 91%  
Amsterdam/Rotterdam/  
The Hague 83%

Manager 91%  
Admin. Employee 84%

San Francisco/Seattle 43%  
Paris Area 21%

Manager 38%  
19-35 yo 33%

My employer **cares about**  
**my well-being** at work

81%  
TOTAL AGREE

29%  
STRONGLY AGREE

San Francisco/Seattle 88%  
London 86%  
Singapore 77%  
Paris Area 73%

Manager 87%  
Administrative Employee 77%

San Francisco/Seattle 43%  
Singapore 24%  
Paris 18%

Manager 36%  
19-35 yo 33%  
Administrative Employee 23%



## HOWEVER, **COMMUTE TIME** IS A MAJOR ISSUE

*I spend too much time commuting to/from work*

**61%**  
TOTAL AGREE

**24%**  
STRONGLY AGREE

**Singapore 70%**

**Amsterdam/Rotterdam/  
The Hague 46%**

**San Francisco/  
Seattle 31%**

**Amsterdam/Rotterdam/  
The Hague 16%**



# ESPECIALLY WHEN MOST EMPLOYEES WORK AFTER HOURS --



*I often work  
outside my working hours  
or when I am on leave*

**63%**  
TOTAL AGREE

**San Francisco/  
Seattle 70%**  
**Singapore 69%**  
**London 68%**

**Paris 56%**  
**Amsterdam/  
Rotterdam/  
The Hague 55%**

**20%**  
STRONGLY AGREE

**San Francisco/  
Seattle 29%**

**Paris 16%**  
**Amsterdam/Rotterdam/  
The Hague 16%**



## -- AND STRUGGLE FOR A BETTER WORK/LIFE BALANCE

*I would like to have a better balance  
between my work life and my personal life*

**79%**  
TOTAL AGREE

**San Francisco/  
Seattle 83%**

**Paris 74%**

**30%**  
STRONGLY AGREE

**San Francisco/  
Seattle 47%**

**Paris 21%**



*I do all I can to maintain very clear  
boundaries between my work and my  
private life*

**86%**  
TOTAL AGREE

**San Francisco/  
Seattle 88%**  
**Singapore 81%**

**Paris 68%**

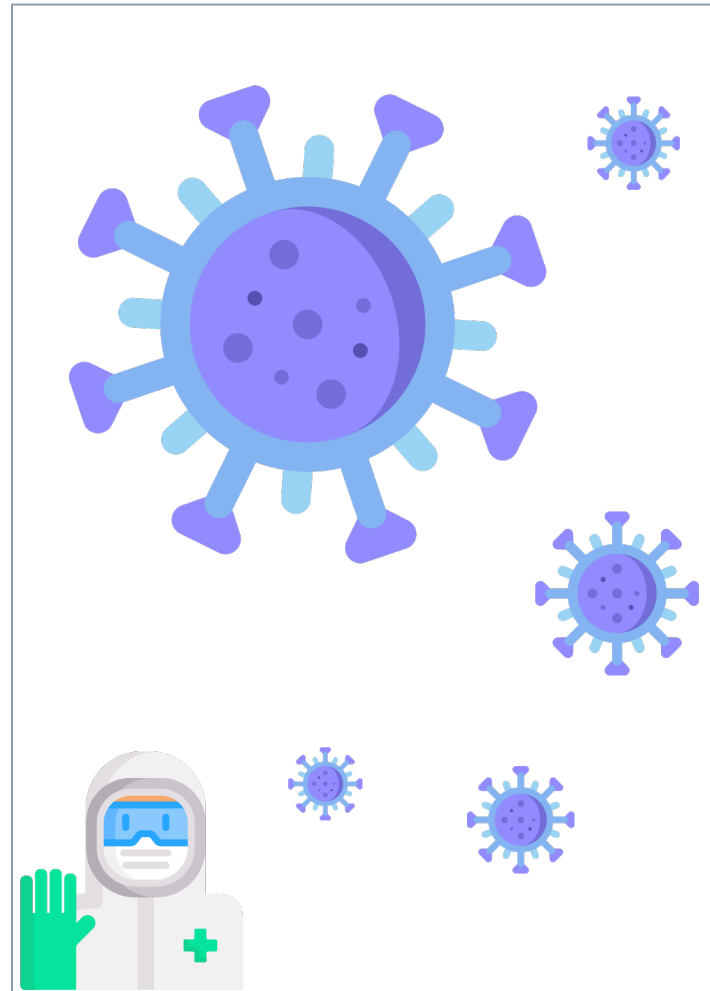
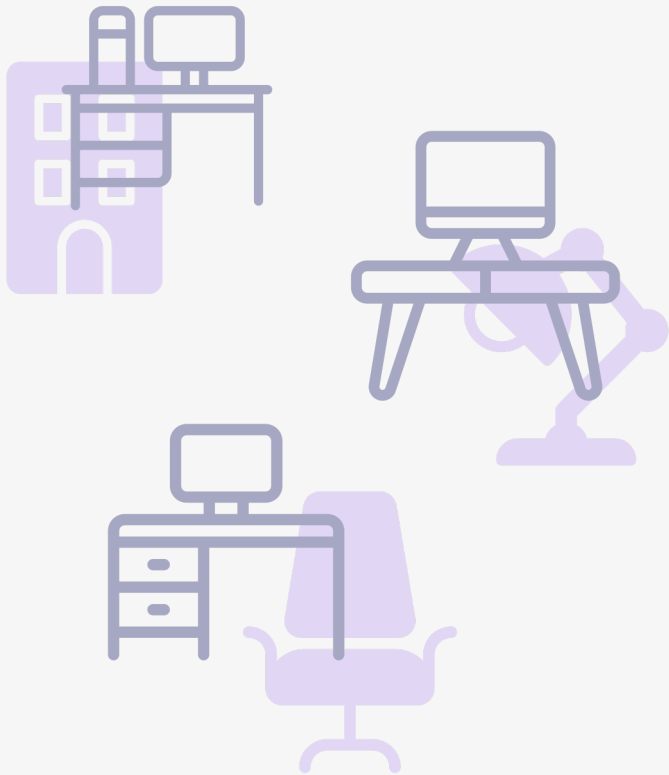
**33%**  
STRONGLY AGREE

**San Francisco/  
Seattle 38%**

**Singapore 21%**  
**Paris 21%**

## KEY QUESTION #2 WHAT IS THE IMPACT OF COVID?

WHAT ARE WORKSPACES  
LIKE **TODAY**?



WHERE/HOW WILL WE  
WORK **TOMORROW**?



# WORK FROM HOME EXPLODED WITH COVID

Worked from home for at least one full day

PRE-COVID

COVID

21%

83%

	Worked from home for at least one full day BEFORE COVID (21%)	Worked from home for at least one full day DURING COVID (83%)	Difference
Total	21%	83%	+ 62 pts
Greater London	17%	85%	+ 69 pts
Singapore	16%	83%	+ 68 pts
San Francisco Bay Area/Seattle	17%	83%	+ 66 pts
Amsterdam/Rotterdam/the Hague Area	26%	83%	+ 58 pts
Paris Area	27%	78%	+ 51 pts

# WITH COVID, EMPLOYEES WORKED FROM HOME AROUND 1 DAY MORE THAN BEFORE



	Average Number of Days Working from home		
	Worked at home for at least one full day <b>BEFORE COVID</b> (21%)	Worked at home for at least one full day <b>DURING COVID</b> (83%)	Difference
<b>Total</b>	<b>2,2</b>	<b>3,2</b>	<b>+1</b>
Greater London	2,1	<b>3,6</b>	+1,6
Paris Area	<b>1,9</b>	3,1	+1,2
San Francisco Bay Area/Seattle	2,4	3,3	+0,9
Amsterdam/Rotterdam/-the Hague Area	2,2	3,1	+0,9
Singapore	<b>2,5</b>	<b>2,9</b>	+0,4

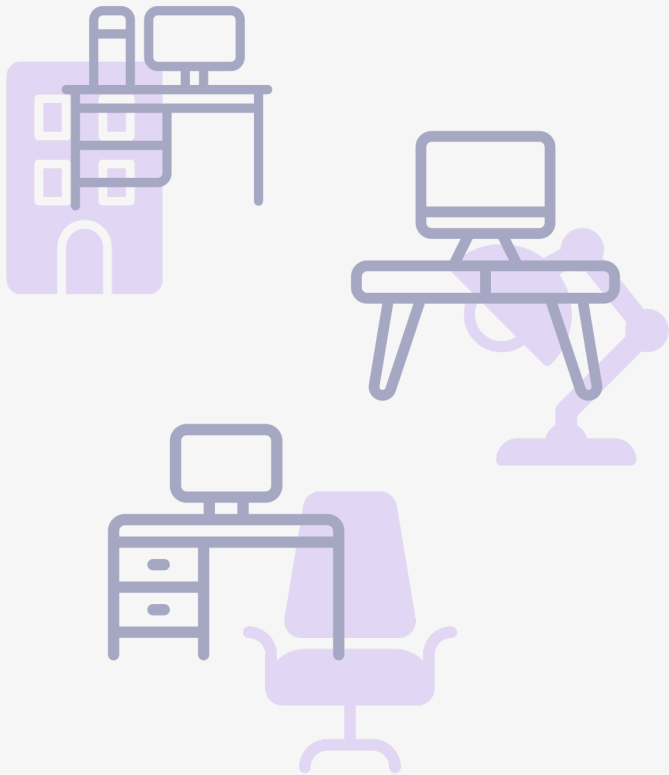
**Data source:** Online survey (January/February 2021). Target sample: 2,628 respondents currently working in one of the major cities included in the scope and working at least occasionally in an office.

**Red/blue:** significantly over/under total sample average (statistical reliability at least 95%)

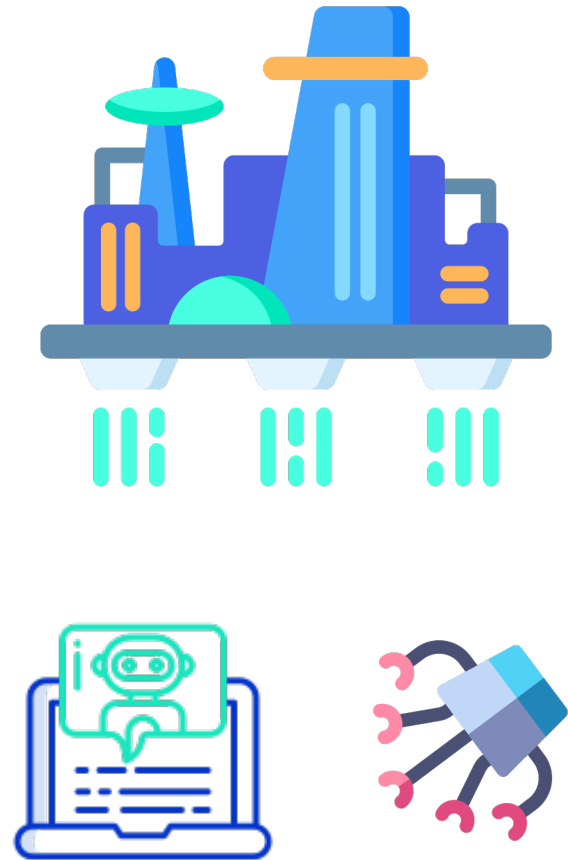
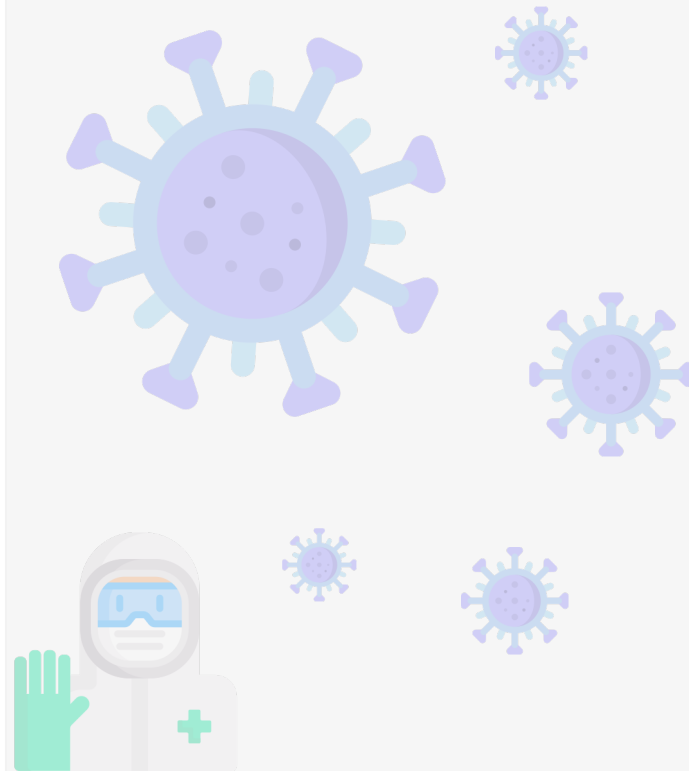


# KEY QUESTION #3 WHERE/HOW WILL WE WORK **TOMORROW?**

WHAT ARE WORKSPACES  
LIKE **TODAY?**



WHAT IS THE IMPACT  
OF **COVID?**



# HOW WILL WE WORK POST-COVID?

The Covid-19 pandemic has changed where and how many of us work.  
In your opinion, when this pandemic is over, **places of work and ways of working...**



... will go back to exactly how they were before the pandemic	18%
... WILL BE A LITTLE DIFFERENT	56%
... will be completely different	20%
I have no idea	6%

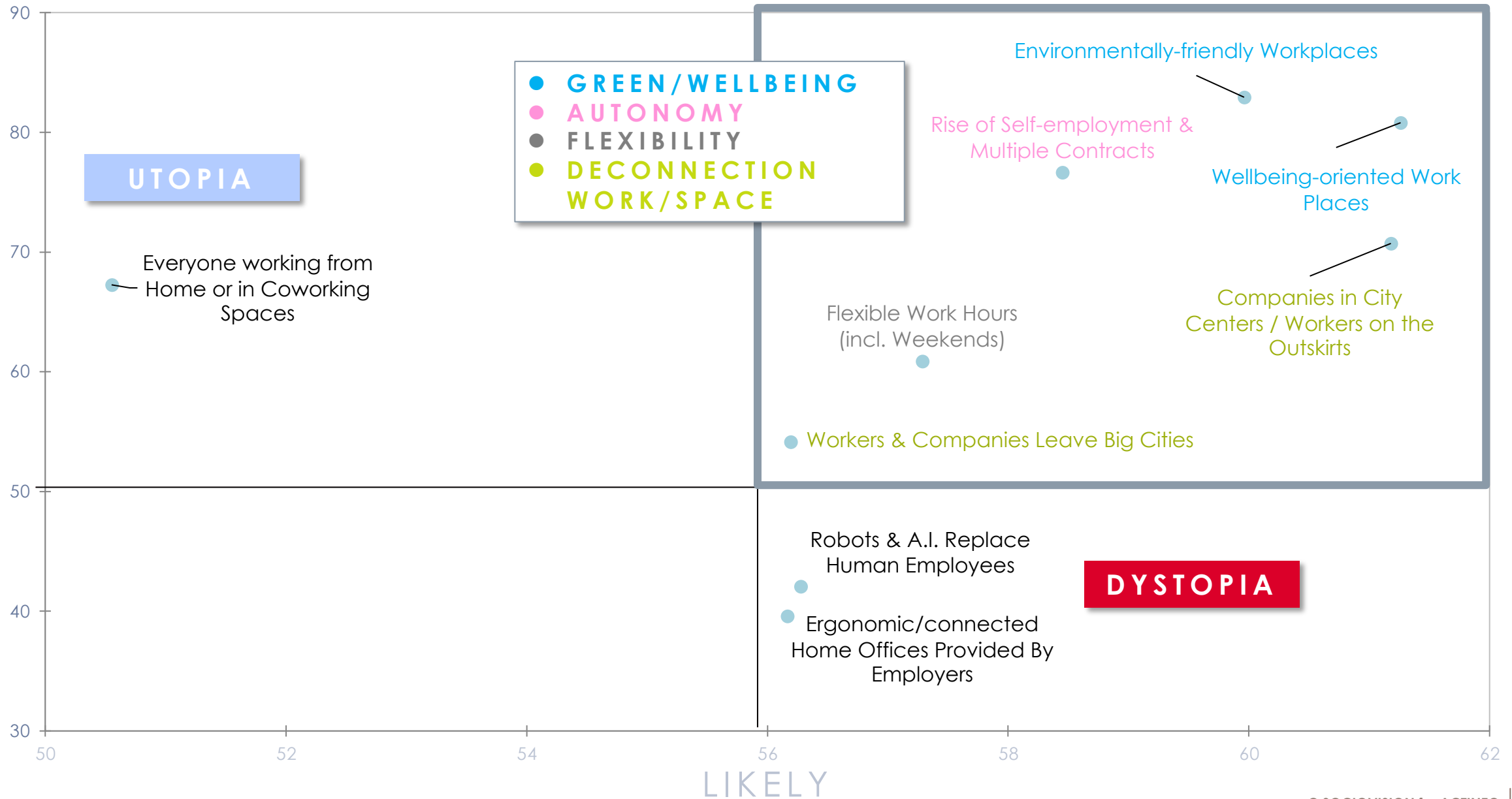
**San Francisco/  
Seattle 22%**

**Paris area 62%  
Amsterdam/Rotterdam  
/The Hague 60%**

**Greater London 25%**

# WHAT EMPLOYEES FORESEE

DESIRABLE





**WHAT WORK EXPERIENCE  
DO EMPLOYEES EXPECT?**



# 1. WHAT KIND OF **WORKING SPACE** WOULD EMPLOYEES **LIKE**?

San Francisco/Seattle 59%  
Paris area 55%

## 3 TOP SCORES (1<sup>st</sup> +2<sup>nd</sup> choice) on a list of 10 propositions

A <b>dedicated</b> workstation in an <b>enclosed individual office</b>	50%
A <b>dedicated workstation</b> in a small shared office	42%
A dedicated workstation in an <b>open workspace</b> , with <b>private areas and meeting rooms</b> available nearby	35%

### Subtotal

- 'DEDICATED WORKSTATION' **89%**
- 'NO DEDICATED WORKSTATION' **30%**

## 2. WORKING FROM HOME IS A MAJOR EXPECTATION



# 85%

of respondents  
would like to work  
from home  
(for at least one full day)

**Manager / Intell., Scientific,  
Artistic Pro. 91%**  
**Industry 89%**  
**19-35 yo 88%**

# 83%

of those who have **never worked  
from home** for a significant  
amount of time (at least a few  
hours) would be interested in  
working from home  
(Filter : Does not work from home  
- 1709 respondents)

**Manager 91%**  
**Industry 90%**  
**Intell., Scientific, artistic Pro. 89%**  
**19-35 yo 88%**  
**Singapore 87%**

# WORKING FROM HOME IS MOSTLY SEEN AS POSITIVE BY COMPANIES

*Where I work, working from home  
is seen as a good thing and encouraged*

67%  
TOTAL AGREE

Paris 59%

24%  
STRONGLY AGREE

San Francisco/  
Seattle 32%

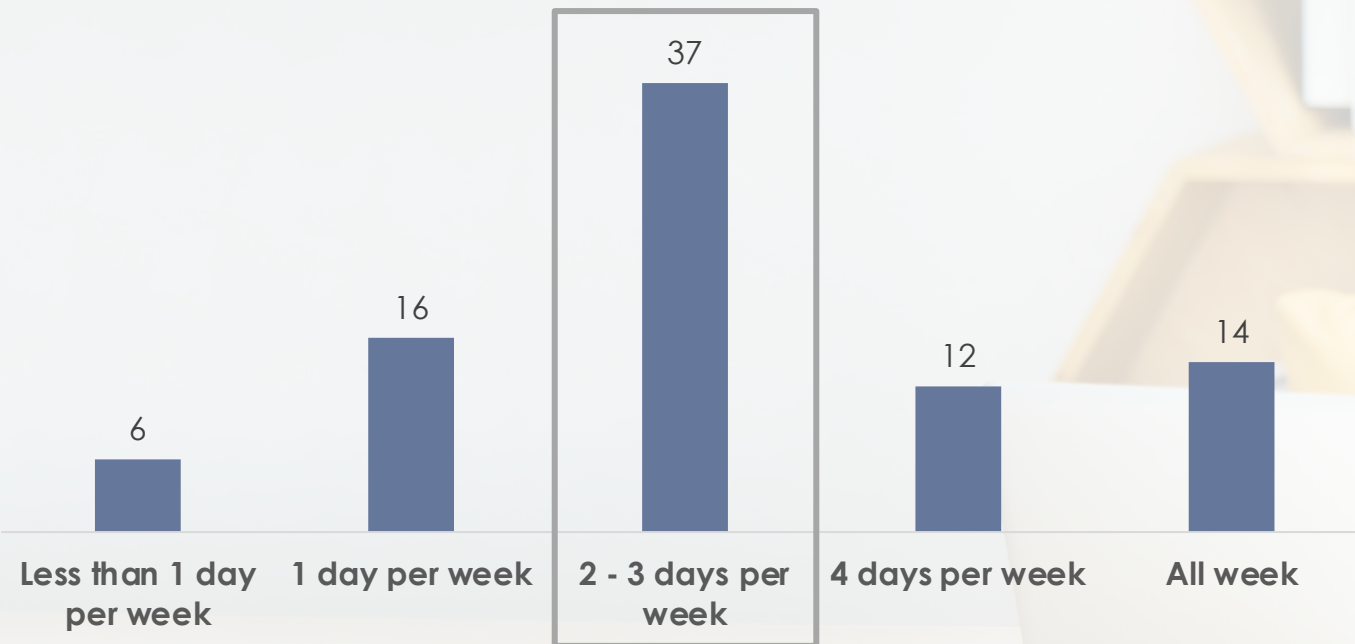
Paris 17%





## THE MAGIC 2-3 DAYS

Ideally, how often would you like to work from home  
(for at least one full day)?



San Francisco/  
Seattle 16%

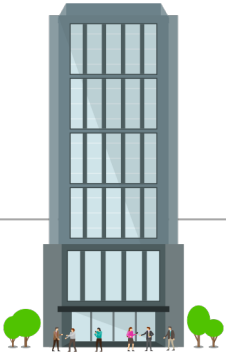
San Francisco/  
Seattle 19%

# 24%

of respondents choose  
"From home 100% of my  
working time" as their  
ideal working place  
(1<sup>st</sup>+2<sup>nd</sup> choice)



# WHAT COULD PREVENT WORKING FROM HOME?



## COMPANY / WORK

My employer  
is not in favour of it

29%

Paris 36%  
Singapore 34%

Admin. Employee 35%  
Service 32%

It is not practical for my work;  
it would require a lot of  
adjustments

26%

Singapore 30%  
Service 28%  
Admin. Employee 21%



## PERSONAL

I don't want to bring  
my work into my  
private space

22%

Singapore 28%  
19-29 yo 27%  
Manager 25%



## SOCIAL

Staying at home to  
work is poorly  
looked upon

18%

San Francisco/  
Seattle 24%  
Manager 23%



## EQUIPMENT

I don't have the equipment  
(professional computer, etc.)  
or the necessary space at  
home

19%

Singapore 22%  
19-35 yo 22%



## NO REASON

I have not yet had the  
opportunity, but I could do it

17%

San Francisco/  
Seattle 24%  
19-35 yo 19%



# WHY STILL GO TO THE OFFICE?

Mostly for socializing and clear work/life boundaries

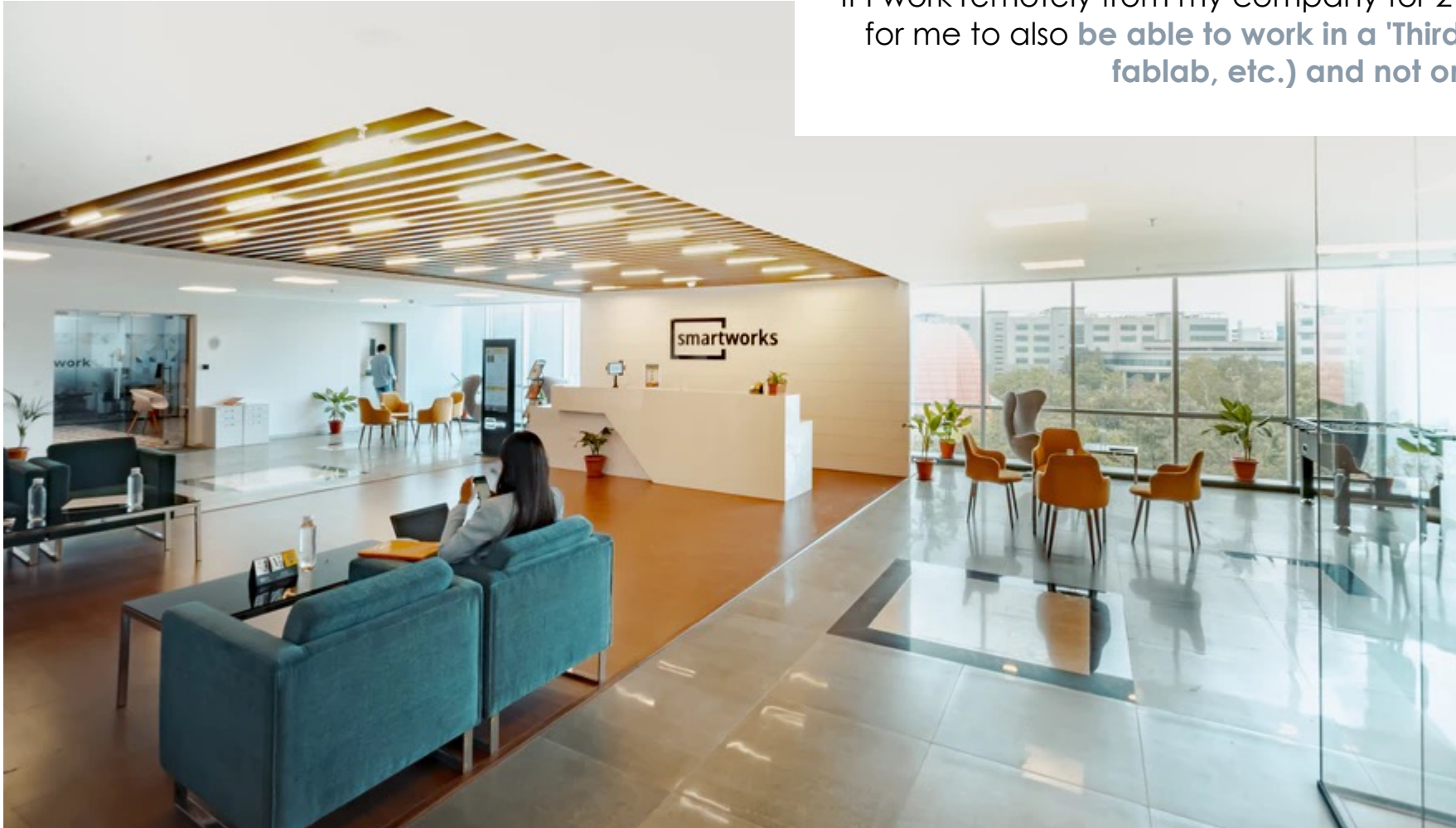
Today, more and more people are able to work from home.  
In your opinion, **going to the office** rather than working from home **allows you to have:**

Informal chats and pleasant moments with colleagues	41%	Paris 45%
A dedicated work area which is clearly separate from your private life	39%	San Francisco/Seattle 47% Singapore 45%
More effective professional conversations	34%	
A space perfectly adapted to your work (ergonomic chair, printer, etc.)	33%	
Informal conversations with management	26%	London 30%
“Unofficial” information about what is happening at the company or organisation	21%	
Access to services at the workplace (creche, concierge, etc.)	18%	Singapore 24%
None of the above; it is possible to work very well solely from home	11%	



### 3. 'THIRD PLACES' ARE THE LINK BETWEEN OFFICE AND HOME

If I work remotely from my company for 2 days a week or more, it is important for me to also **be able to work in a 'Third Place' nearby (coworking space, fablab, etc.) and not only from my home**



55%

TOTAL AGREE

Singapore 64%  
San Francisco/  
Seattle 63%

Manager 65%  
19-35 yo 60%

18%

STRONGLY AGREE

San Francisco/  
Seattle 25%

19-35 yo 27%  
Manager 25%



## RETHINKING THE GLOBAL EMPLOYEE EXPERIENCE



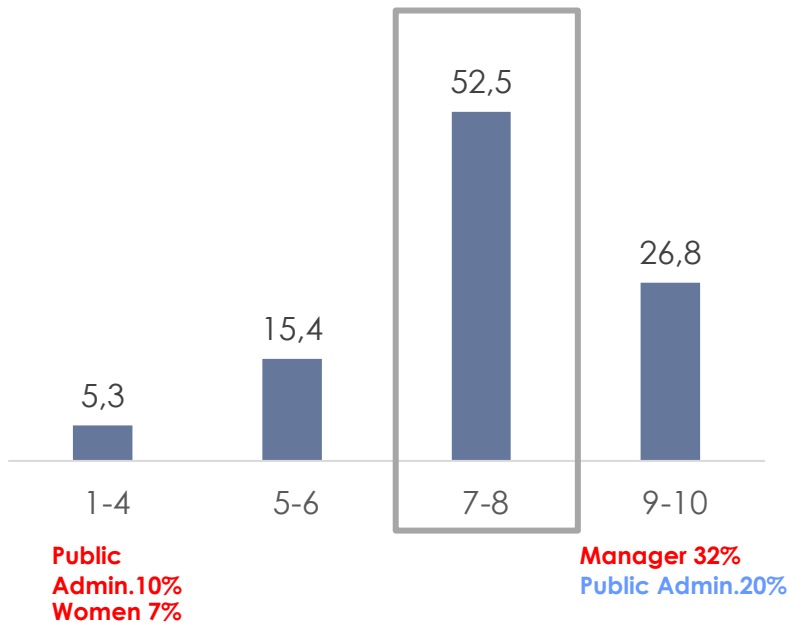
# HOME OFFICE EQUIPMENT IS GLOBALLY SATISFYING --

Filter: Works at home for a few hours or a whole day

Thinking of the equipment you have for working at home,  
what is your **level of satisfaction in terms of --**

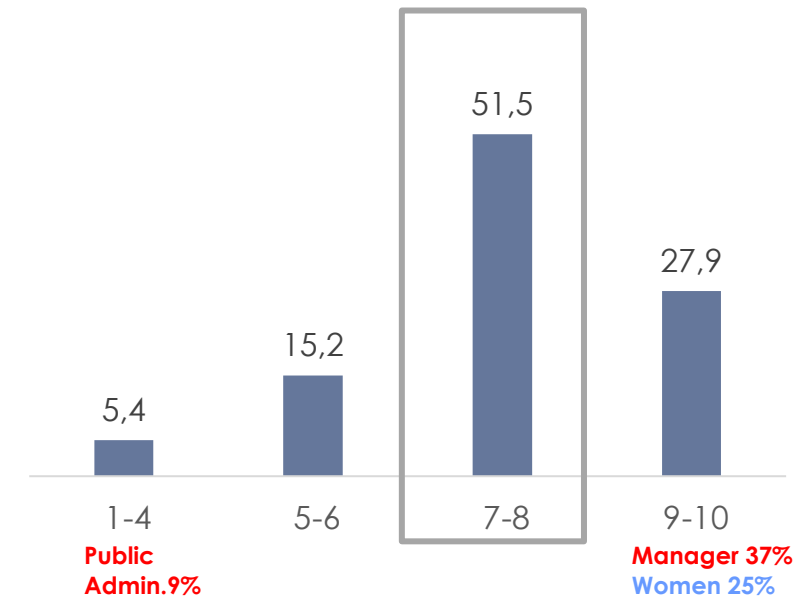
## YOUR QUALITY OF LIFE

7.5/10



## YOUR EFFICIENCY

7.6/10





## -- BUT $\frac{3}{4}$ OF RESPONDENTS **WOULD LIKE THEIR COMPANY TO HELP** THEM IMPROVE THEIR HOME OFFICE EXPERIENCE

Let's assume that you have to work from home. To allow you to work comfortably from home, which solution would you like your employer to provide?

**74%** would like their employer to participate



**34%**

Free choice of equipment with **financial contribution** by employer (with purchase receipts)

**20%**

Employer provides **customised workstation** (ergonomic chair, desk, adapted lighting, etc.)

**19%**

Fully financed equipment, but chosen from a **limited range**

**15%**

I already have what I need

**12%**

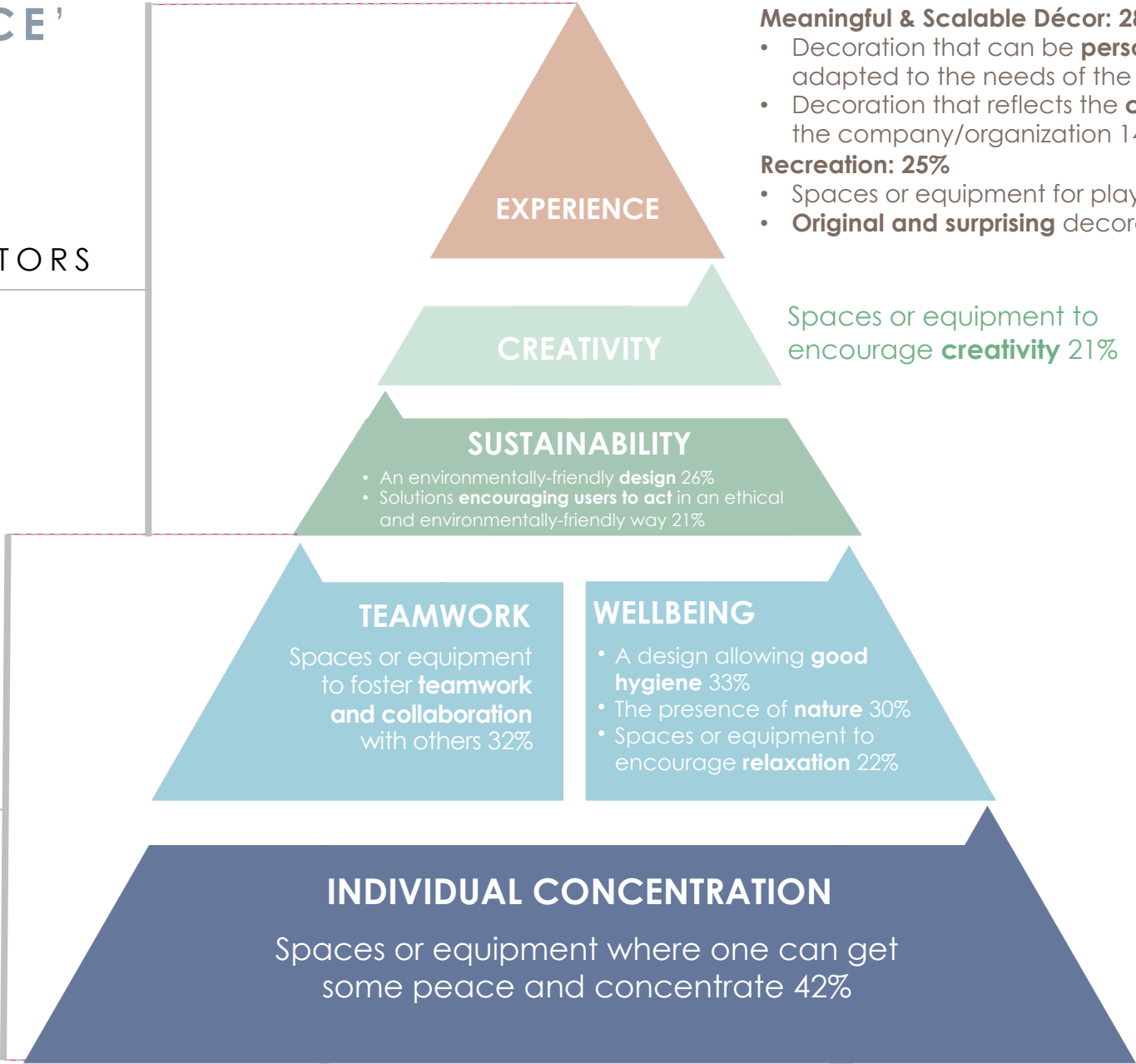
I'll set my workstation myself



# THE 'IDEAL WORKSPACE' PYRAMID

DIFFERENTIATORS

MUST-HAVES



% Most Important in Creating a Quality Workspace (1st+2<sup>nd</sup> choice)

# WORKSPACE DESIGN MATTERS!

I place great importance on the design  
and decoration of the place(s) where I work

70%  
TOTAL AGREE

22%  
STRONGLY AGREE

**San Francisco/Seattle 32%**  
**Manager 29%**  
**19-35 yo 27%**  
**Amsterdam/Rotterdam/  
The Hague 26%**





# THANK YOU FOR YOUR ATTENTION

**actineo**

L'observatoire de la qualité de vie au travail

une initiative de



avec le soutien du

**CODIFAB**

comité professionnel de développement  
des industries françaises de l'ameublement et du bois

In partnership with

**MAISON&OBJET**

**Colliers**

A survey by **sociovision**  
MASTERING A CHANGING WORLD

**To Find out More about Quality of Life at Work:**

[actineo.fr](http://actineo.fr)

[ameublement.com](http://ameublement.com)

Follow us on 

[maison-objet.com](http://maison-objet.com)

[colliers.com](http://colliers.com)

Thank You