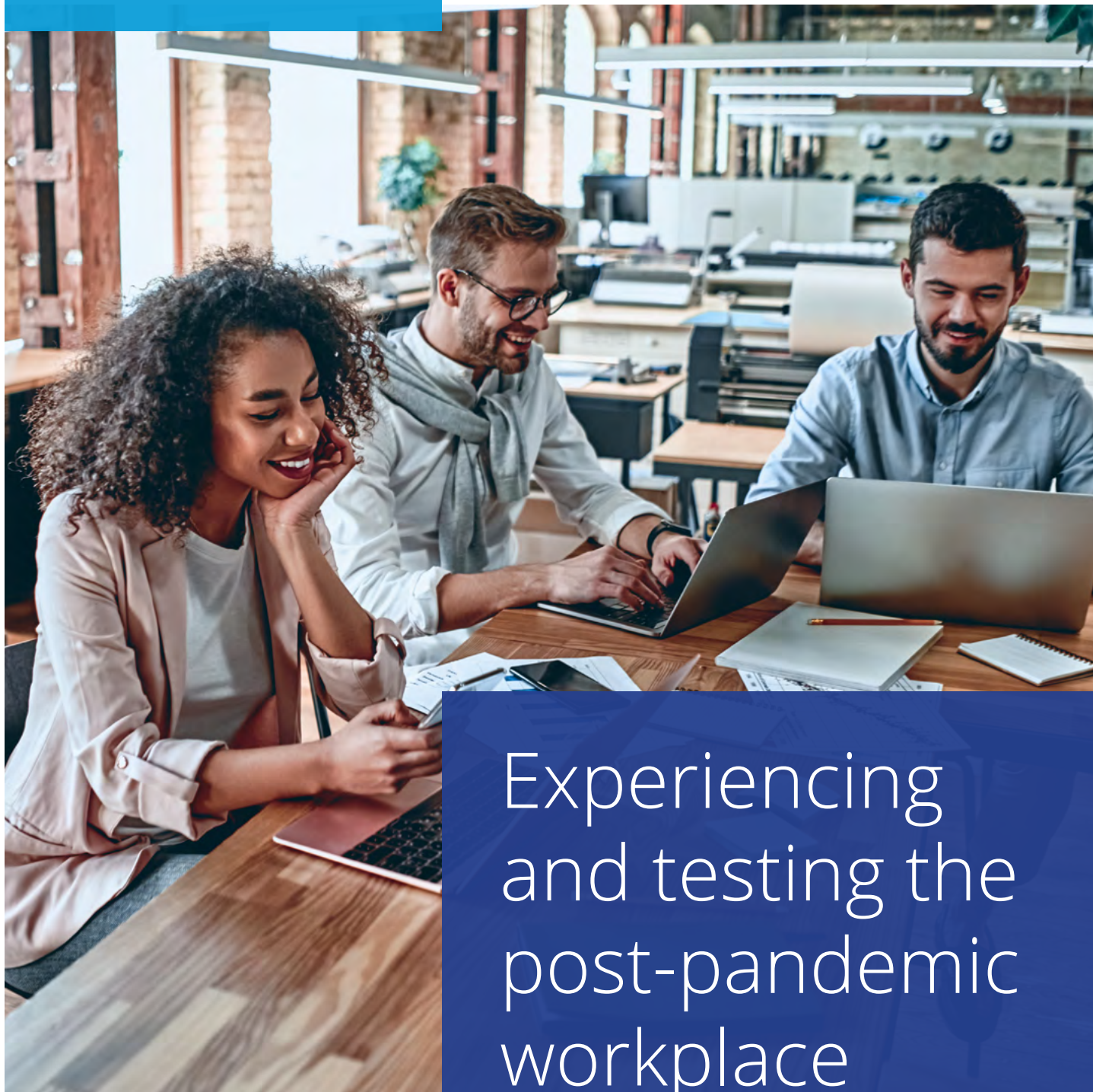


Occupier Services | EMEA  
**Workplace Advisory**



# Experiencing and testing the post-pandemic workplace

Trial and error - identifying,  
implementing and optimising  
the best solutions





## Introduction

The COVID-19 crisis has dramatically impacted the way we work. This shift will affect not only how we work in the near future, but will have far-reaching effects on work and the workplace.

In our previous report 'Exploring the Post-COVID Workplace', published in 2020, we shared our data on how organisations and employees experienced remote working during the pandemic. In our second report 'Developing the Post-Covid Workplace', published in 2021, we focused on how organisations developed workplace strategies for the post-pandemic world of work.

It is now 2022 and another year has passed. There are still COVID-19 variants in circulation but restrictions have lifted in most countries and we see employees returning to offices. However, the extent to which people return differs significantly by organisation and country. In response, many organisations have started resizing and repurposing their workplaces to suit a new hybrid working model.

The Colliers Workplace Advisory team is at the forefront of workplace change, working with hundreds of organisations to transform offices based on the experiences gathered, and opportunities afforded from COVID-19.

This report 'Experiencing and testing the post pandemic workplace' shares insights on how employees are currently returning to the office, as well as examples of successful early stage workplace transformations. It examines:

- How employees return to the office; expectations versus reality
- How organisations are changing their offices; case studies of recent post-pandemic workplace transformations

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Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising

Our shared journey

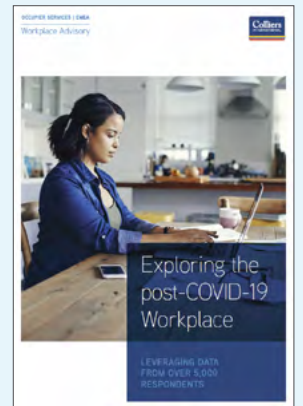


Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising

- Exploring the post-COVID workplace based on initial experiences with remote working due to COVID-19 2020

**Report:**  
'Exploring the post-COVID-19 workplace'



- Developing the post-COVID workplace 2021

**Report:**  
'Developing the post-COVID workplace – an update from the field'



- Experiencing and testing the post-COVID workplace 2022

**Report:**  
'Experiencing and testing the post-COVID workplace' – trial and error - identifying, implementing and optimising the best solutions





Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising

## How do people return to the office?

A data snapshot from Basking.io occupancy data

Colliers collects data on how people are returning to the office together with its partner [Basking.io](#), the workplace occupancy analytics platform. Using an infrastructure-as-a-sensor approach, the data is analyzed in real-time through proprietary software that connects to existing Wi-Fi networks. The result is a comprehensive set of reports on workplace usage, fully anonymized in compliance with GDPR data privacy requirements.

The data presented in this report is the aggregated data from over 100 offices globally, primarily in Professional Services and Technology sectors across the world with 39% of offices located in EMEA, 40% in North America, 10% in LATAM, and 11% in the APAC region.

This is still a relatively early data set, Colliers will keep monitoring, measuring and comparing results to identify how data changes over time, particularly as organisations trial and test different approaches to returning to the office.

The numbers shared in this section are global averages, however differences are identified per region, country and organisation.

Basking.io Occupancy Dashboard



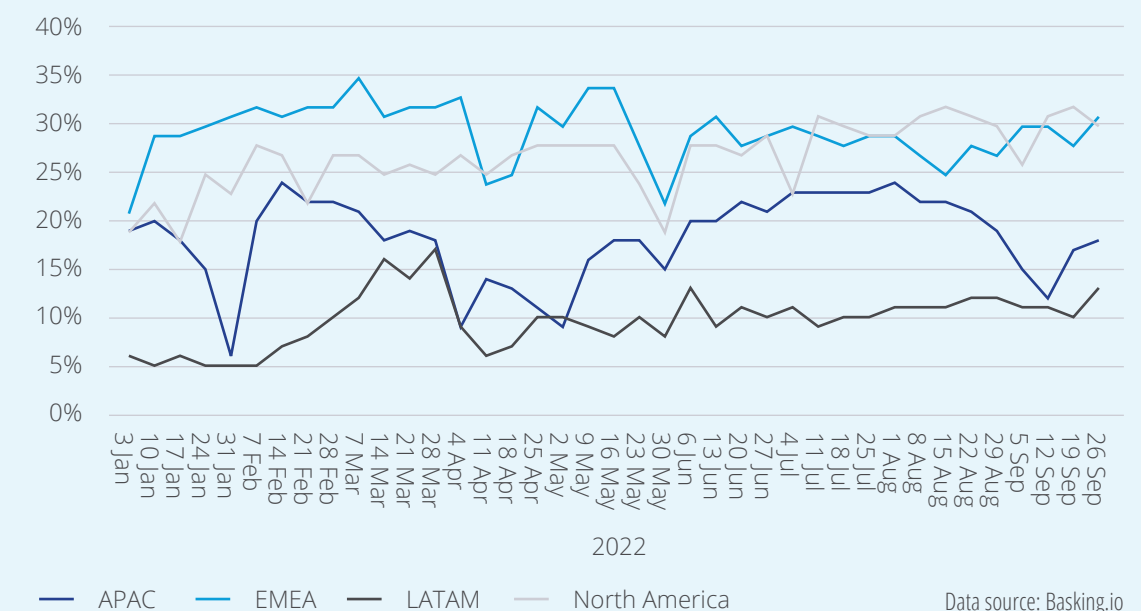
Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising

## Average Peak Occupancy

*The Average Peak Occupancy rate remained below 35% in Q1-Q3 2022 globally. It was lowest (9%) in LATAM. EMEA and North America show the highest occupancy rates.*

AVERAGE PEAK OCCUPANCY RATE



Data source: Basking.io

The graph shows Average Peak Occupancy for APAC, EMEA, LATAM and North America. Average Peak Occupancy refers to the percentage of workstations in an office occupied at the busiest time of each day.

EMEA and North America are ahead in terms of return to the office compared to other regions. However, the average peak occupancy is still below 35% (on average under 35% of workstations in offices are occupied).



Experiencing and testing the post-pandemic workplace

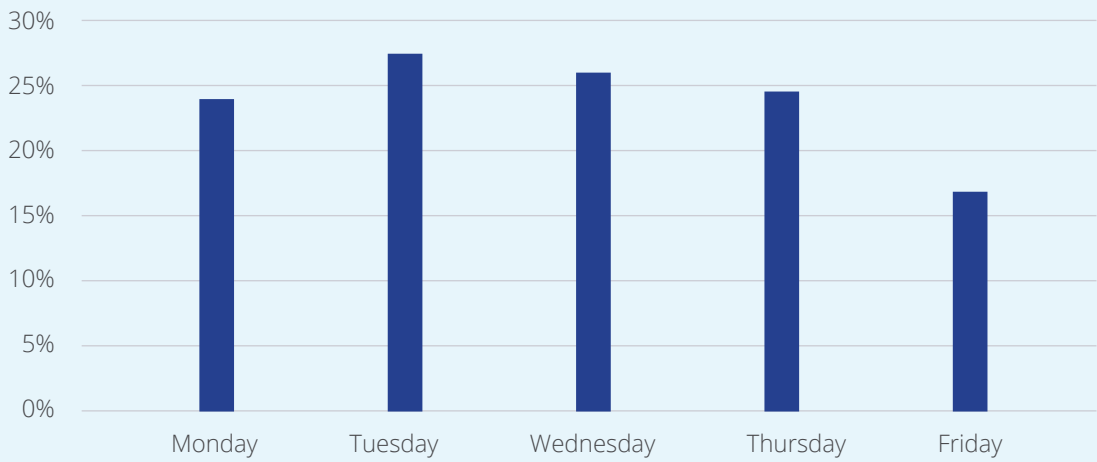
Trial and error - identifying, implementing, optimising



## Occupancy spread across the week

*On Fridays the measured occupancy is significantly lower compared to the other weekdays.*

AVERAGE OCCUPANCY PER WEEK DAY (GLOBAL AVERAGE)



Data source: Basking.io

Friday, and to a more limited extent Monday, show lower occupancy levels compared to the other weekdays. This is a consistent trend across all regions.

Experiencing and testing the post-pandemic workplace

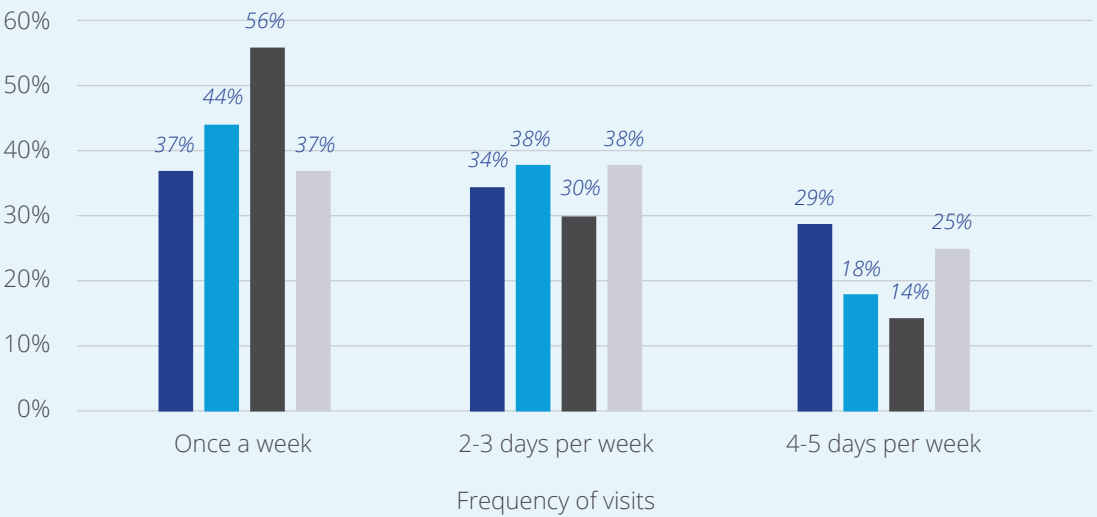
Trial and error - identifying, implementing, optimising



## Number of visits per week

*Approximately 80% of office users come to the office less than 4-5 days a week*

PERCENT OF WEEKLY VISITS



APAC EMEA LATAM North America

Data source: Basking.io

The graph shows how many days people visit the office on average per week. The vast majority of people come in less than 4-5 days a week. APAC (29%) observed the highest number weekly visits for 4-5 days, followed by North America (25%), EMEA (18%) and LATAM (14%).



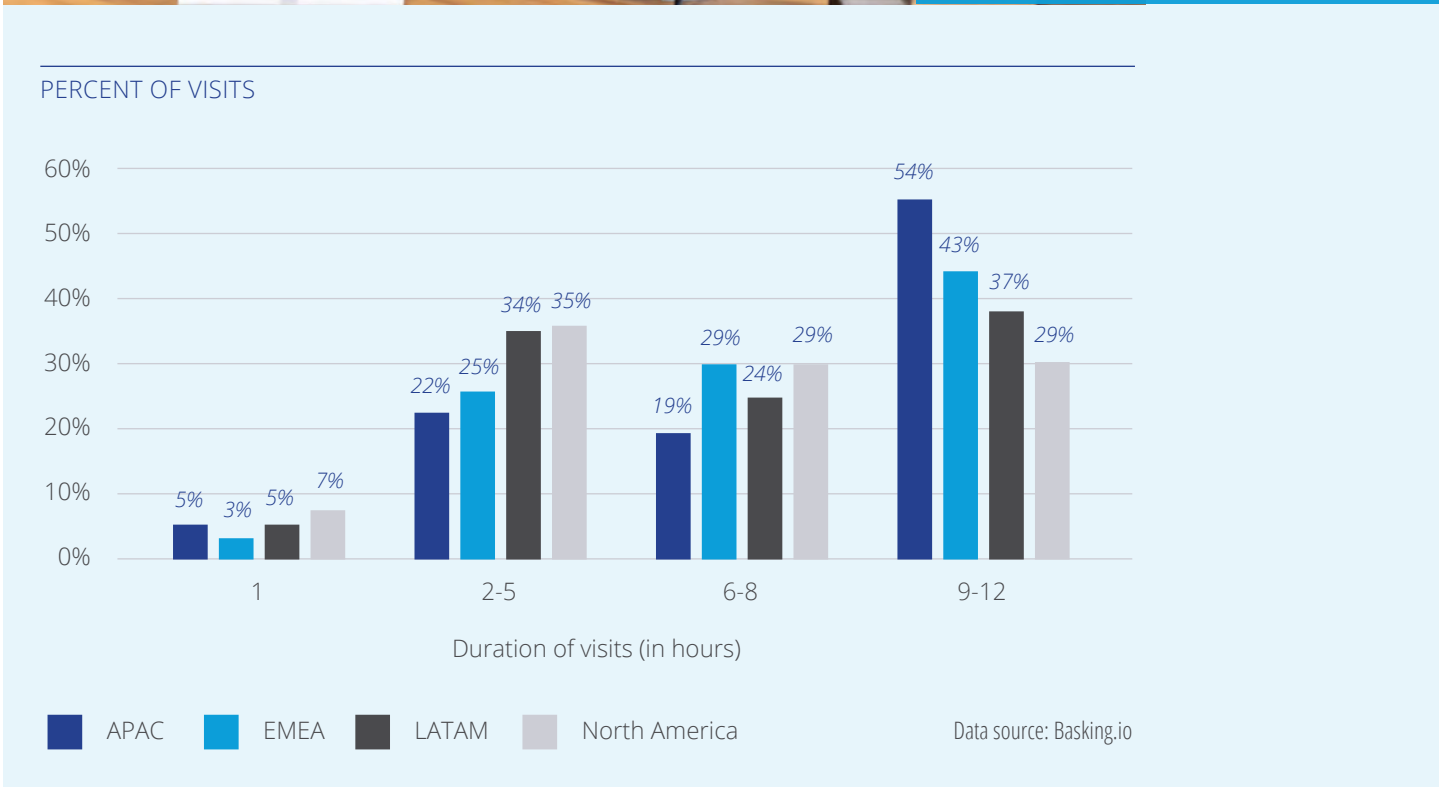
Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising

### Duration of office visits

The '8 hours per day in the office' norm is gone.

The number of office visits decreased, but the duration of visits increased, in particular in APAC and EMEA.



In APAC and EMEA, office users stay in the office longer compared to the other regions.

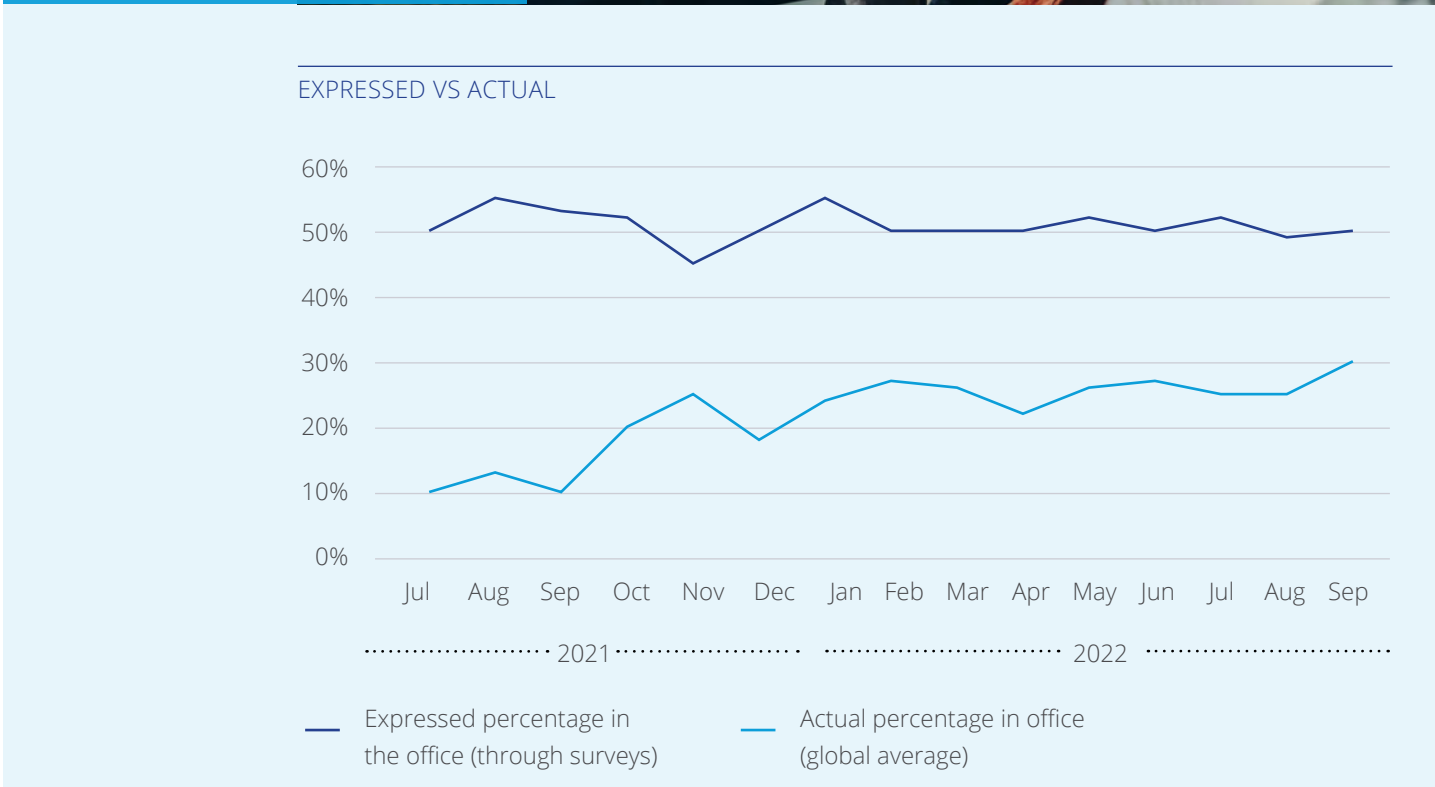


Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising

### Expectations versus reality

Actual measured occupancy is lower compared to the expressed desired presence in the office



During the pandemic, Colliers measured the desired presence in the office through global surveys and the [Colliers Workplace Expert online tool](#). Employee sentiment on the desired number of days working from the office was gathered from more than 15,000 professionals globally. The graph compares the desired number of days working from the office (expressed) compared to real occupancy data (actual) from Basking.io.

The expressed desired percentage working from the office (expressed) is more or less stable over time. The latest data from Q2 and Q3 2022 still shows an average desired presence in the office of approximately 50% (2.5 days). The actual occupancy is substantially lower. There is a gap between the number of days that organisations and people state they want to work from the office and the actual number of days people are in the office.





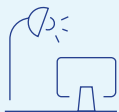
## Drivers behind the return to the office

*Many factors impact on how  
and when people return to  
the office.*

The data demonstrates that people are returning to offices at different paces, with many differences between individuals, organisations and countries. A variety of factors impact on how people are returning including. Here we will zoom into the potential impact of country culture.



Personality and  
personal preference



Type of work and  
activities performed



Organisational  
culture



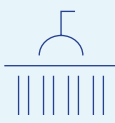
Country culture



Commute time  
and costs



Employer policies



Government  
advice



Digital infrastructure  
in country and living  
situation



## Country culture

A potential key factor impacting on how people return to the office is country culture. We examine cultural dimensions developed by social psychologist Geert Hofstede to assess country culture. Hofstede developed one of the first and most popular frameworks for measuring cultural dimensions in a global perspective and includes six dimensions. This model can be useful to determine how a global hybrid working strategy can be delivered most effectively.

The two dimensions that arguably have the largest impact on how people return to the office are 'Individualism vs Collectivism' and 'Power Distance'.

### Individualism / collectivism

The high side of this dimension, called individualism, is reflected in whether people's self-image is defined in terms of 'I' or 'We'. In countries that score high on individualism it is arguably more challenging to get people back to the office. It is more likely that people make their own choice for where and how to work (which may be more remote-based). In collectivistic countries, people tend to focus more on the group and team, and arguably prefer to be more physically together.

Examples of countries that score:

*High on Individualism:* UK, France, Netherlands

*Low on Individualism:* Romania, Greece, Macedonia

### Power distance

Another relevant key dimension is 'Power Distance'. People in countries exhibiting a large degree of power distance are typically a hierarchical order in which everybody has a place, and which needs no further justification. In countries with a high level of power distance, there is potentially a stronger push to return to the office. If a manager wants employees back in the office, it may be more likely that people will accept this compared to countries with a low level of power distance. We see at many organisations that the number of days managers want employees to be in the office is higher than the number of days employees are in.

Examples of countries that score

*High on Power Distance:* Belgium, France, Poland

*Low on Power Distance:* Denmark, Netherlands, Sweden

### How to use this in the implementation of new hybrid work strategies

It is important to be aware and adapt to country culture and potential levels of resistance instead of taking a one size fits all approach when developing, delivering, and managing change associated with new hybrid work strategies. Country culture is fluid and changing, therefore it is important not to have a single focus on this. We believe that it is important to be aware of it, and when required adapt to it, but also take other factors into account. When implementing global workplace strategies it is also critical to customise the communications and change management strategy to country culture. In some countries more comprehensive change programs may be required compared to other countries.




# How organisations are changing their offices

In this section, we share unique insights from multiple Colliers Workplace Advisory projects where new post-pandemic workplace concepts have been developed and implemented. It provides a practical view of the key changes undertaken to the workplace post-pandemic compared to pre-pandemic.

In our 2020 and 2021 reports Colliers predicted that the role and function of offices would change post-pandemic. In our reports we predicted the following key changes:


- Focus less on facilitating individual work

Individual work




Less individual work spaces / desks
- Focus more on facilitating collaboration and community

Collaboration




Increased collaborative and social spaces in the office
- Less dense offices

Density




Less dense offices with more variety, through reduced sqm per headcount, but increased sqm per workstation
- Higher quality space

Quality of space



Renewed focus on higher quality space by testing and trialling new hybrid working solutions, setups and technologies
- High degree of flexibility and adaptability

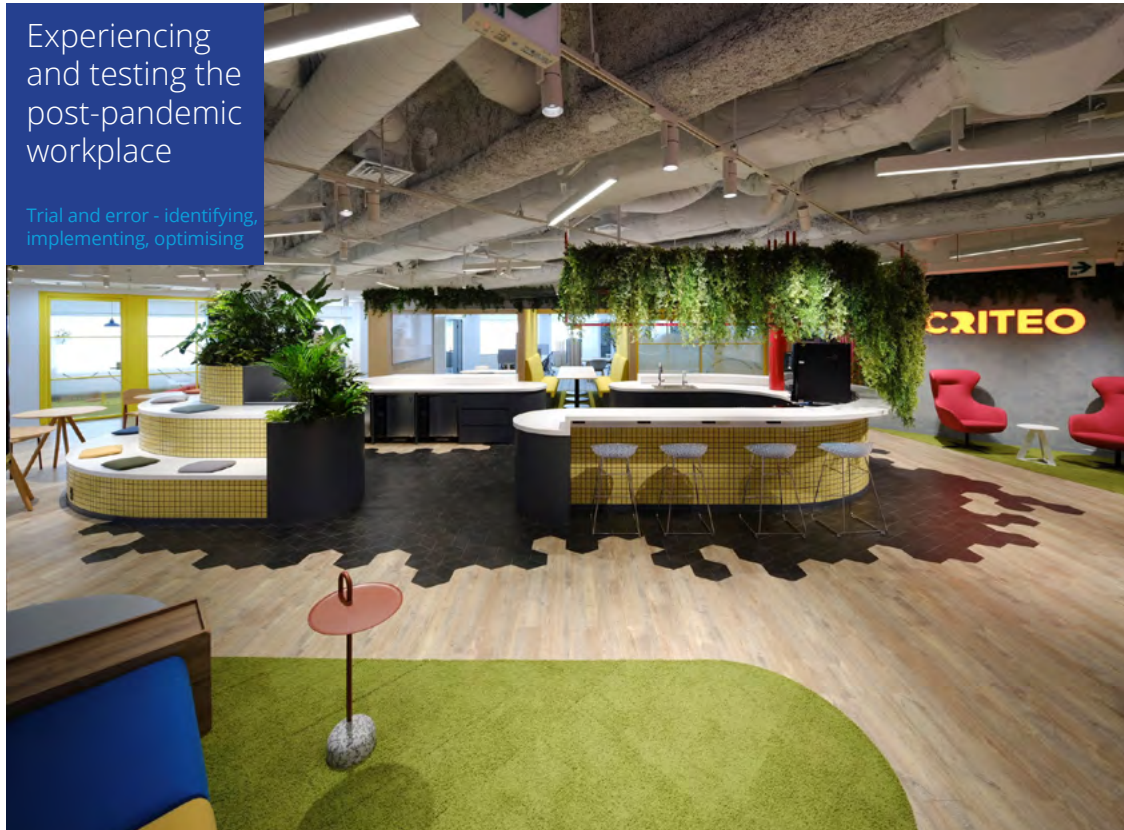
Flexibility



Flexible and adaptable workplace elements to adapt to continuous changing needs

**Now, 2 years later**, the Colliers Workplace Advisory team has been working with many organisations on transforming their workplaces. Organisations are developing offices to be responsive to inevitable changes as they optimise hybrid working over the next years. On the following pages we will share unique insights through examples of recent workplace transformations and test the assumptions made in 2020 and 2021.





**Criteo**  
Global  
Technology industry

## Workplace transformation

Criteo has transformed their key offices through right-sizing space requirements and repurposing the role of the office. This is to create a new workplace experience which supercharges collaboration and community.

This is a future-fit response to Criteo's shift to a fully flexible work from home policy. Criteo transformed the offices during the pandemic in order to create an entire new experience when people started returning.

Colliers worked with Criteo to develop the global workplace strategy and transform workplaces simultaneously in Paris, Barcelona, New York, Ann Arbor, Singapore and Tokyo.

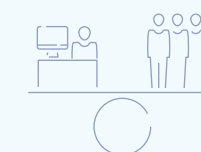
- Colliers scope:
- Workplace advisory
  - Change management

Experiencing  
and testing the  
post-pandemic  
workplace

Trial and error - identifying,  
implementing, optimising

## Key characteristics of new post-pandemic workplace concept:

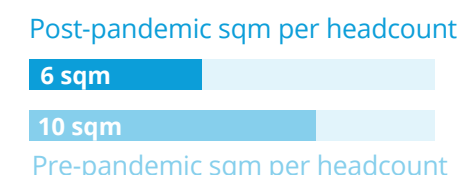
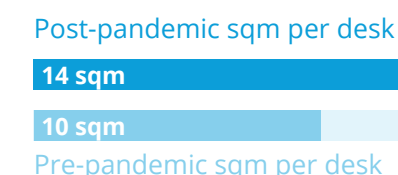
### Workplace mix



**Pre-pandemic:** Approximately 70% of the space was allocated to individual desks and only 30% to collaborative settings. **Post-pandemic:** New workplace concept in which approximately 70% of the space is allocated to a variety of collaborative, learning and development and social settings.



### Density



### Sharing

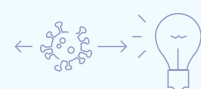


Desk sharing: **Yes**, implemented for all employees

Desk Ratio: **0.33:1** (desk per headcount)

Implementation of desk booking technology: **Yes**, desks and team tables can be booked

### What's new compared to pre-pandemic?



**Example of a new setting, technology or behaviour not implemented pre-pandemic:** Semi-circular 'campfire' collaboration space with multiple screens for in-person meeting participants to accommodate remote attendees in the most inclusive way possible. It is also suitable for in-person meetings.

### User experience

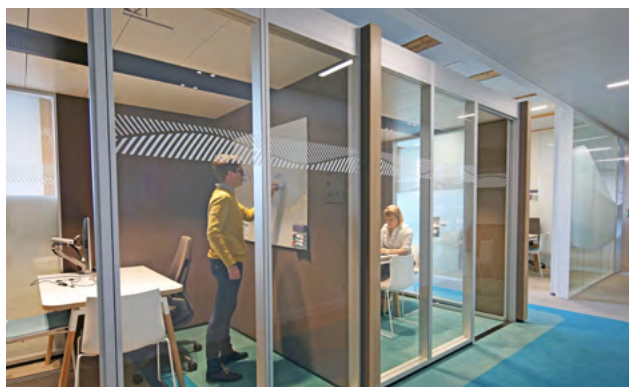


Criteo has approached the **workplace as always being in beta phase; a shared journey between the organisation and employees**. This means budget is also allocated to making changes in the short to medium term based on employee feedback loops. The variety of collaborative and social spaces is different to a typical workplace, creating a less corporate and more relaxed 'co-working' style of space where the role of the desk is reduced.



Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising



**AXA GO**  
Paris, France  
Insurance industry

Workplace transformation

AXA Group operations (AXA GO) is an integral part of AXA and creates innovative technology and data solutions to help AXA fulfil its ambition.

AXA GO had implemented a 'Hybrid Ways of Working' approach pre-pandemic for its Global Headquarters in Paris, with the help of Colliers.

In order to integrate new post-pandemic era needs and opportunities, AXA GO decided to go a step further by joining occupants of two sites together. This was supported by providing new types of spaces to support the now more meaningful 'days on site together as a team'.

- Colliers scope:
- Workplace advisory
  - Change management
  - Project management

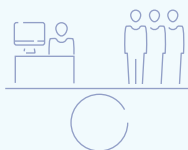


Experiencing and testing the post-pandemic workplace

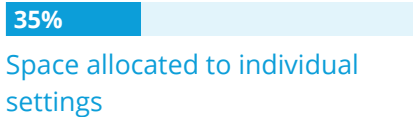
Trial and error - identifying, implementing, optimising

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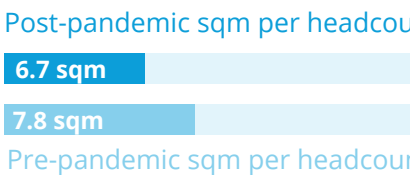
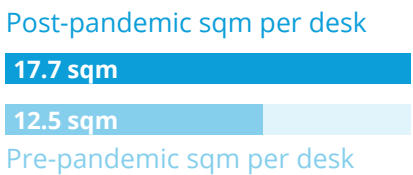
Workplace mix



60% of the space is allocated to community and collaborative spaces, 30% to various types of individual desks, and 10% to workstations bookable per team only (in a way, halfway between individual and collaborative).



Density



Sharing



Desk sharing: **Yes**, implemented for all teams

Desk Ratio: **0.4:1** (desk per headcount)

Implementation of desk booking technology: **Combination**, teams can book team spaces for days together on site while individual (activity-based) desks remain in free seating only.

What's new compared to pre-pandemic?



**Example of a new setting, technology or behaviour not implemented pre-pandemic:** Two new types of spaces for team days on site : **bookable and reconfigurable, closed spaces with mobile desks (huddles)**, as well as 'classic' open space workstations bookable under the form of **team tables (bookable per team only)**.

User experience



There is an increase in quality (space, technology, acoustics) of both collaborative and individual settings. This is coupled with the introduction of **more attractive community and events spaces, as well as spaces for team days on site**. While the initial expectation was that the activity in the office would be mainly collaborative, it turned out there is also **still a strong need for comfortable individual settings**, with increased acoustic expectations due to virtual meetings.



Experiencing  
and testing the  
post-pandemic  
workplace

Trial and error - identifying,  
implementing, optimising



**UniCredit**  
Prague, Czech Republic  
Financial industry

**Workplace transformation**

UniCredit Bank decided to implement their ‘Smart Office’ project for their head office in Prague.

The project goal was defined as the introduction of an activity-based working concept, a full office refurbishment and optimisation of the occupied office area.

The project included 14 floors in one building. There was a reduction of the office area of 4 floors over the UniCredit Group companies.

The new space opened mid 2022.

Colliers scope:

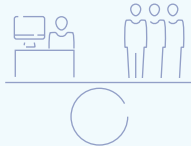
- Workplace advisory
- Change management
- Project management

Experiencing  
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workplace

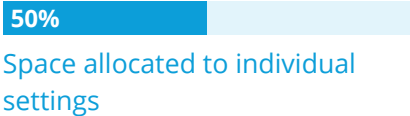
Trial and error - identifying,  
implementing, optimising

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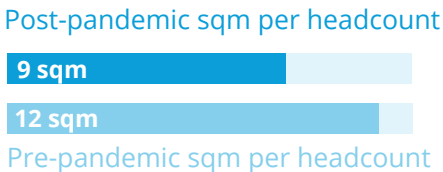
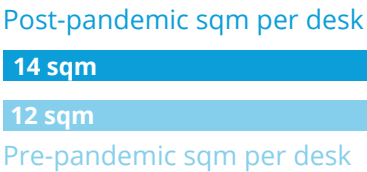
**Workplace mix**



**Before:** A classic open plan workplace with small meeting rooms along the corridors and limited social areas. **After:** Changed to a modern collaborative office equipped with a large business lounge on each floor and optimized number of meeting rooms and phone booths.



**Density**



**Sharing**



Desk sharing: **Yes**, implemented for majority of teams

Desk Ratio: **0.7:1** (desk per headcount)

Implementation of desk booking technology: **Considered for 2023**

**What's new compared to pre-pandemic?**



**Example of a new setting, technology or behaviour not implemented pre-pandemic:** ‘Office & Meet’ setting. This is an enclosed office equipped with specific furniture to be used either as an individual manager office (not dedicated) or team meeting room.

**User experience**



The new workplace is completely different to the pre-pandemic experience. The **‘Smart Office’ concept** has enabled smooth transformation in and out of pandemic lockdowns. The technology allows full work from anywhere and the number of processes managed digitally have improved. The design provides a creative and collaborative atmosphere for all teams.



Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising



**Marsh McLennan**  
Brussels, Belgium  
Professional Services industry

### Workplace transformation

Since March 2015, 3 subsidiaries of Marsh McLennan (Marsh, Guy Carpenter and Mercer) have occupied a 5-storey office building in Brussels.

At the end of 2020 Marsh McLennan engaged Colliers to help implement a new Hybrid Way of Working (HWOW) strategy and to change the existing work environment.

The challenge was reconciling the needs and ways of working of the three organisations and their employees, whilst also implementing a new HWOW environment in the existing offices. It was also important to keep structural changes and costs to a minimum.

Colliers scope:

- Workplace advisory
- Change management
- Design & build

Experiencing and testing the post-pandemic workplace

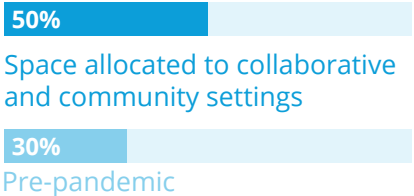
Trial and error - identifying, implementing, optimising

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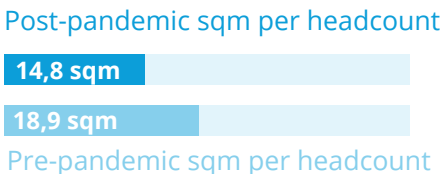
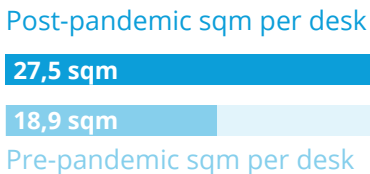
#### Workplace mix



**Before:** All dedicated desks and very few spaces for collaboration. **After:** Diversification of spaces (mainly to support hybrid working and collaboration) and down-sizing of the open spaces.



#### Density



#### Sharing



Desk sharing: **Yes**, implemented for all employees

Desk Ratio: **0.57:1** (desk per headcount)

Implementation of desk booking technology: **Yes**, all workstations and hybrid meeting spaces can be booked

#### What's new compared to pre-pandemic?



**Example of a new setting, technology or behaviour not implemented pre-pandemic:** Full collaboration area that can be re-arranged based on changing needs.

**Cockpits (1-4 person)** to allow for video conferencing calls.

#### User experience



Marsh McLennan's vision is that work is not a place, instead it is about what you do. The company gives **full flexibility** to employees to choose where they work. As a result, the office became a place where people can **primarily exchange ideas with colleagues and collaborate**. This became the primary reason for why people want to come back to the office.



Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising



**ProRail**  
Netherlands  
Railway Network Infrastructure

**Workplace transformation**

As one of the first organisations in the Netherlands, ProRail acted on the impact of COVID by transforming the office and way of working. Knowing their employees would return to the office with a new purpose, Colliers helped ProRail with innovating the workplace strategy and work concept. Colliers consulted in setting out and coordinating the change program, in which the team dialogues were the key focus point. These were designed to make the difference in daily work practice of all ProRail teams. This approach supported ProRail in being awarded 'best hybrid employer 2022' in the Utrecht Region.

- Colliers scope:
- Change management
  - Strategy

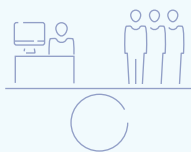


Experiencing and testing the post-pandemic workplace

Trial and error - identifying, implementing, optimising

**Key characteristics of new post-pandemic workplace concept:**

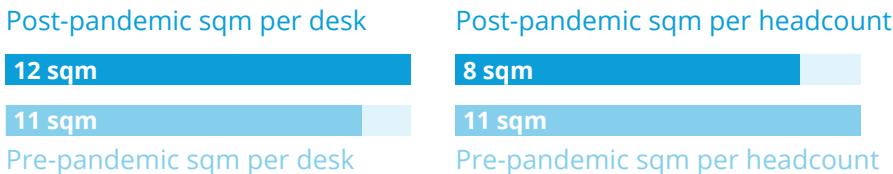
Workplace mix



Balance individual space and collaborative space in new environment. From team zones to department zones, in which teams can book their shared working spaces for (part of) a day. These zones are connected by flexible space, connecting the areas and boosting collaboration.



Density



Sharing



Desk sharing for all teams, combined with option to book team zones  
Desk Ratio: 0.5 - 0.7 :1 (desk per headcount)

What's new compared to pre-pandemic?



Offices facilitate collaboration & inspiration through more shared co-working areas with different settings like team spaces, project areas, video call spaces and silent areas.

User experience



Strong focus on meeting up with colleagues and get inspired by social interaction and knowledge exchange, other than working individually. Higher quality services like food&beverages and more greenery.



Experiencing  
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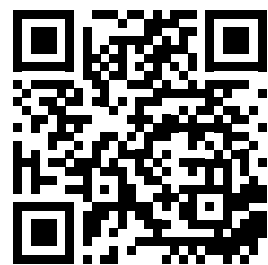
Trial and error - identifying,  
implementing, optimising



## Call to action

### Now is the time to rethink the office!

The experiences from COVID-19 are currently changing the way we work. There will be a stronger focus on combining working from the office and remotely. Offices are becoming social meeting places to collaborate, connect and socially interact with teams. This brings great opportunities to strategically rethink the way your organisation works and rethink the workplace. There is no one-size-fits-all solution. The Colliers Workplace Advisory team is here to help identify and develop your workplace of the future. Curious to what workplace could best suit your business? Use our free Workplace Expert tool to get high level insight in your specific workplace requirements. Scan QR code.



Experiencing  
and testing the  
post-pandemic  
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Trial and error - identifying,  
implementing, optimising

### Continuously measuring and optimising the workplace

To continuously improve workplaces it is important to measure how employees are returning to the office post-pandemic and what their experiences are. This is to ultimately identify how the workplace can be optimised, repurposed and/or right sized. The Colliers team can collect data via our proven research methodology:

- Provide insights into [workplace effectiveness](#): the impact of the workplace on business performance (employee engagement, productivity, wellbeing, talent attraction, sustainability, etc)
- Provides insight into [workplace efficiency](#) (occupancy, costs, etc)
- Prioritise specific workplace transformation programs across an office portfolio, based on current performance
- Identify quick wins and areas for optimisation

### Colliers Workplace Advisory

The Colliers Workplace Advisory team is specialised in developing and continuously optimising workplaces, as well as hybrid working strategies, to accelerate the success of organisations.

We start with analyzing your business needs followed by developing workplace solutions which are aligned with the needs and will accelerate organizational success.

In addition to local workplace transformations we work with organisations to develop regional or global guidelines. This approach provides a level of consistency in how people work and how offices function regionally or globally. When implementing guidelines we measure success to enable learning and continuous improvement.

### Colliers Change Management

Colliers works with organisations to develop and execute communication and change management strategies to ensure that a change in way of working is embraced by management and employees.



## About the authors



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JanJaap is leading the EMEA Workplace Advisory team at Colliers and is based in London. The team consists of more than 90 workplace and change advisors assisting organisations develop efficient and effective workplaces. JanJaap has a background in Organisation Studies and worked as a strategy consultant before joining Colliers in 2012. Since that time he has developed workplace strategies for clients across the world. He is also a mentor in the Techstars PropTech Accelerator programme, mentoring Property Technology start-ups.



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Sven is an experienced workplace advisory leader, based in London, and operates across EMEA. Prior to his current role, Sven led Workplace Advisory for Colliers in Australia. He has a proven track record of developing and implementing local, regional and global workplace strategies to accelerate the success of corporate, institutional and government organisations, across EMEA, APAC and The Americas. Sven has a background in workplace design, architecture and real estate.

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