

OFFICE OR HOME?

BNP PARIBAS REAL ESTATE
CONDUCTS A MAJOR EUROPEAN
SURVEY OF 3,500 EMPLOYEES

SURVEY CONDUCTED BY IFOP - FEBRUARY 2022



**BNP PARIBAS
REAL ESTATE**

Real Estate
for a changing
world



Working in the office or at home: **what are the expectations and incentives for employees in Europe?**

Teleworking was suddenly deployed massively in 2020 and it is now taking root, changing the way we live and interact. This experiment, tested on a large scale in response to the pandemic, prompted companies across the globe to opt for this solution, and many employees were forced to change their habits and how they related to work. Yet **depending on age, gender or national culture, this relationship to work, whether in the office or at home, can reveal very different behaviours** which sometimes lead to questions about employee motivation.

Scorned by some and embraced by others, the home office is becoming established, with all the attendant consequences for real estate: hybridization of spaces, essential connectivity, etc. The boundaries between work and private life are becoming blurred. The office is moving into the home, the uses of time and place are changing, the meaning of neighbourhood has become more significant, while office buildings and business premises must reinvent themselves if they are to make their employees want to come (back) to the office and attract new talent.

So what trends are emerging from these new ways of working and living? What are the "different" expectations of Europeans after almost two years of trying out alternatives? How can an office building remain attractive compared to housing that is "supposedly" comfortable but not always suitable for working in?

BNP Paribas Real Estate teamed up with IFOP to survey 3,500 service sector employees in seven European countries to identify and compare their aspirations.

What are the essential features of the future office? What is the ideal layout for the home? The survey highlights the disparities between countries, but also the aspects on which many converge, regardless of their location or culture.

By regularly listening to and consulting with employees and residents, BNP Paribas Real Estate can help build the city of the future, a sustainable and responsible place, full of interactions to enhance the quality of life, with spaces redesigned to be used in new ways, adaptable living areas, and services to help people live together.

We are integral to the urban fabric and ready to support you on your path towards an inclusive and resilient city.



METHODOLOGY



WHO ?

Seven samples in different European countries were surveyed, each consisting of office-based service workers aged 18 and over:

- France : 500 people.
- Germany: 500 people.
- UK: 501 people.
- Italy: 502 people.
- Spain: 504 people.
- Netherlands: 500 people.
- Belgium: 500 people.



WHEN?

The interviews were conducted by online self-completion questionnaire from 7 to 11 February 2022.



NOTE

Significant differences between countries are indicated by  

RESULTS OF THE SURVEY



OVERALL VIEW OF THE OFFICE

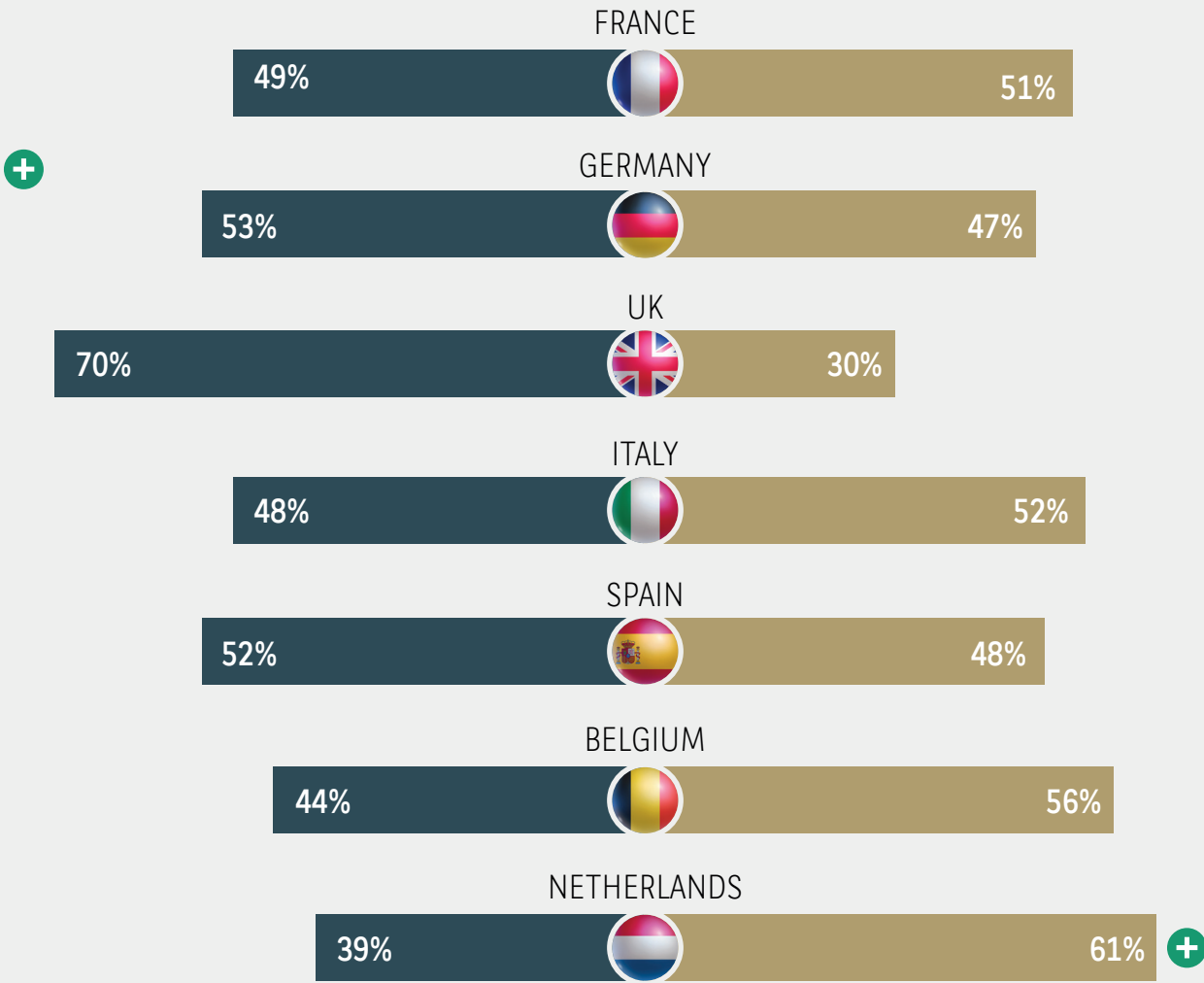


You consider offices to be...

A place to work, nothing more, where you prefer to spend as little time as possible



More than just a place to work, a place to spend time and meet people



PAN-EUROPEAN TRENDS

- The office is still above all a place to work for 70% of employees in the UK. Conversely, for those in the Netherlands and Belgium, it is also a place to spend time and meet people for most of those asked (respectively 61% and 56%).
- This is a fairly even split in other countries where the office is as much a place to work as to socialise. This trend is particularly pronounced among the under-30s in France and Germany, cohorts that are keen to socialise.

OVERALL VIEW OF THE OFFICE BY EMPLOYEE PROFILE

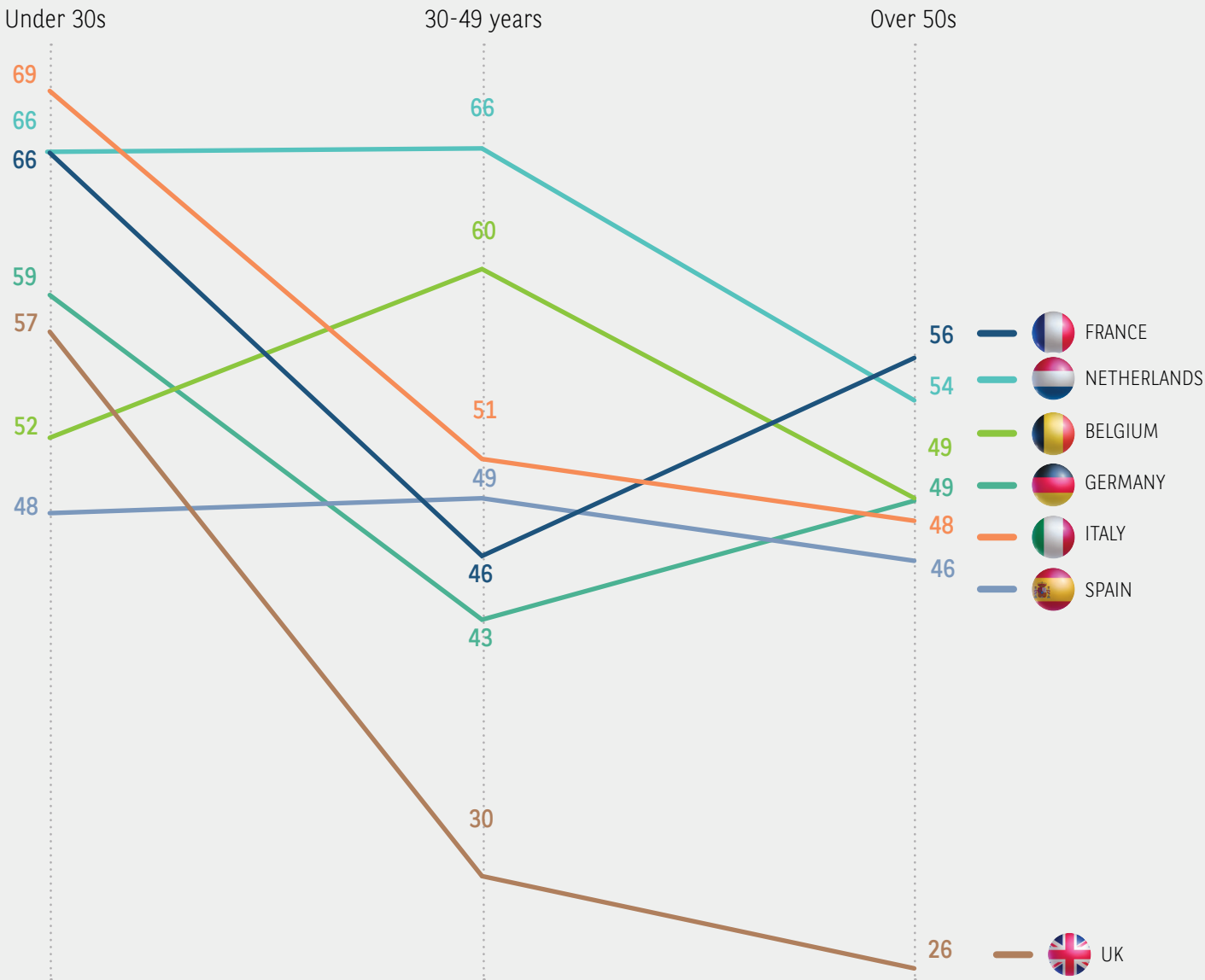
PERCEPTION VARIES TO CONSIDER THE OFFICE AS A PLACE TO SPEND TIME AND MEET PEOPLE ACCORDING TO THE AGE OF THE RESPONDENT

Young people (under 30) are most likely to consider the office as a place to spend time and meet people in France (66%), Germany (59%), the UK (57%) and Italy (69%). In Belgium, it is those aged 30 to 49 who most consider the office a social place (60%). In the Netherlands, a larger proportion of employees - the under 30s and the 30-49s - value the convivial aspect of the office (66% for each age segment).

At the other end of the scale, offices are above all a workplace:

- For those aged 30-49 in France (54%) and Germany (57%)
- In the UK for most employees: those aged 30-49 (70%) and the over 50s (74%)

In Spain, there is no difference by age segment in the way the office is perceived.



DIFFERING VIEWS BETWEEN PUBLIC AND PRIVATE SECTOR EMPLOYEES

In Belgium, public sector employees most appreciate the social aspect of the office (60% of respondents) compared to France where it is rather the private sector employees (54%).

A PLACE TO SPEND TIME, A PLACE TO WORK, DIFFERING VIEWS DEPENDING ON THE NATURE OF THE ACTIVITY

In the UK and Spain, employees in the Commercial sector see the office solely as a place to work (79% and 61% respectively)

Conversely, for 61% of employees in the Administrative sector in Belgium, the office is also a place to spend time and meet people.

Workspace layout (designated workstation in an open space / flex-office / dedicated individual office)

The layout of the workspace generally had a limited impact on the perception of the office, except in Spain where the flex-office is seen as more sociable for 55% of those asked (vs. 48% on average) unlike the French, who found the flex-office restricted the office space to a workplace only (53% of respondents vs 49% overall).

BEYOND HOUSING SIZE RESTRICTIONS, DIVERGENT CULTURAL VIEWS

The office is still primarily a workspace for employees with 1-2 rooms at home in France (60%), Germany (59%) and Italy (64%).

Conversely, in Spain, 56% of those surveyed that had a small home (1 to 2 rooms) consider the office to be a sociable space.



ESSENTIAL OFFICE CRITERIA

PAN-EUROPEAN TRENDS

There is little appetite for services inside the office in the Netherlands (only 34% see the point) in contrast to employees in France and Germany, where 50% of respondents felt the need for services (this is even more pronounced among flex-office employees).

Traditional workspaces, whether individual or collective, remain essential for most employees in Europe. Employees over 50 particularly prefer individual workspaces.

Access to public transport is systematically valued (for over 41% of those surveyed) compared to soft mobility offers (considered useful by 13% to 27% of employees in Europe). Access to public transport is less of a deciding factor for young people under 30 (except in Italy and the Netherlands).

Flex-office space is not particularly popular with French and Spanish employees (only 20% of respondents consider it a necessity). However, there is greater enthusiasm for flex-offices among employees from the Netherlands (45%) and Belgium (34%).

Women are more likely to be looking for services and shops near their workplace than men in most countries (except the Netherlands).

Public sector employees are more likely to demand better connectivity than private sector employees (except in the Netherlands).

Across all the countries surveyed, Tertiary-Service sector employees have the highest expectations of services and shops near their workplace.

ANALYSIS BY COUNTRY

In France, 46% of employees consider social spaces to be essential (café, cafeteria, lounge). Individual workspaces are also necessities for 46% as well as spaces for group work and better connectivity (44% for these last two).

In Germany, individual workspaces and accessibility by public transport are the most important criteria for 48% of respondents. Next come group workspaces and social spaces for 40% and 37% of those surveyed.

In the UK, employees' primary concerns are individual workspaces and better connectivity (for 53% of them), followed by good accessibility by public transport (49%).

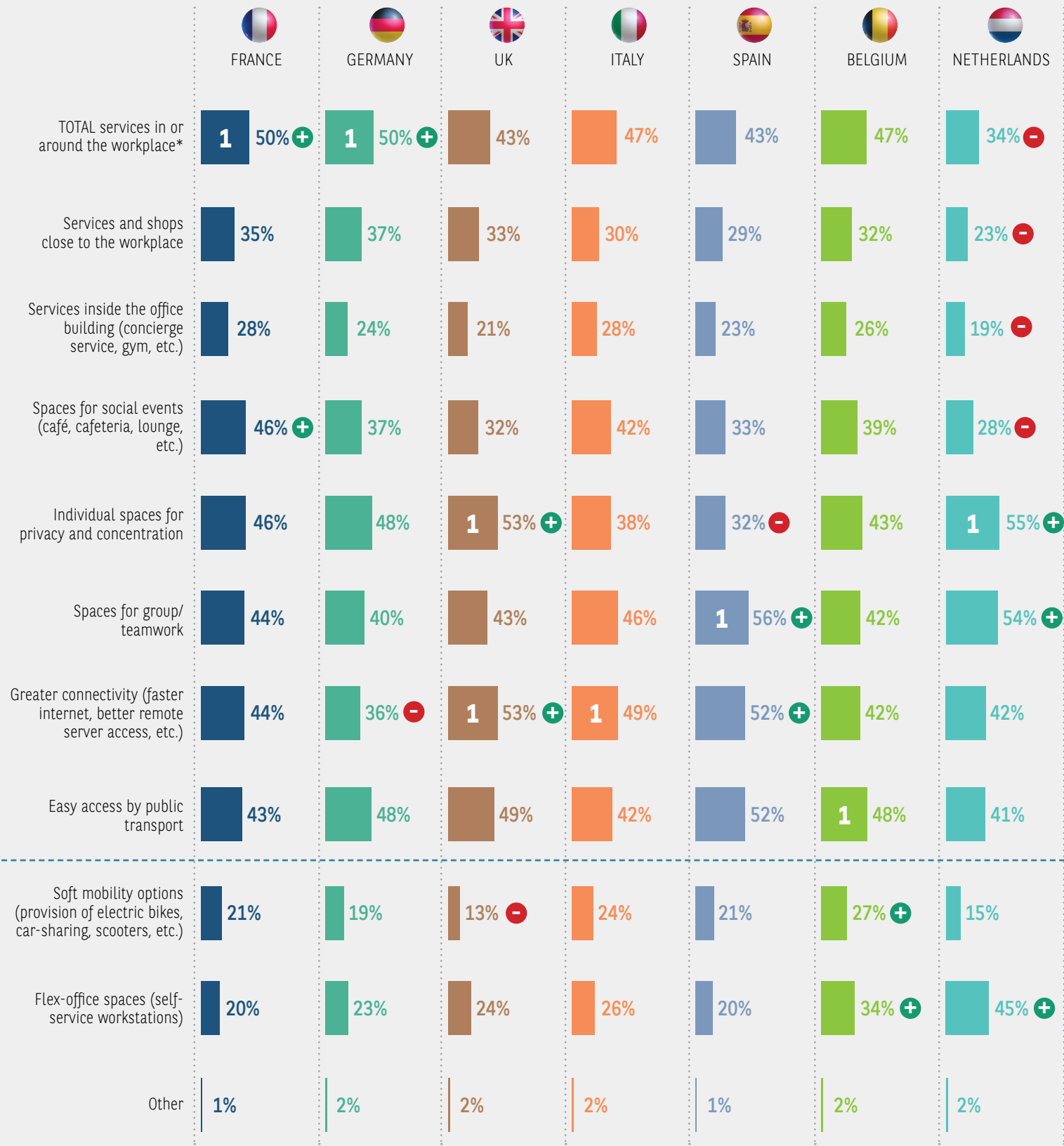
In Italy, the top criterion identified is better connectivity (49% of respondents), followed by spaces for group work (46%).

In Spain, spaces that encourage group/teamwork are appreciated (56% of respondents) as well as greater connectivity (52%).

In Belgium, the decisive factor for employees is accessibility by public transport (cited by 48% of respondents). Next on the list are individual workspaces (for 43% of those surveyed), group workspaces and greater connectivity (42%).

In the Netherlands, employees attach great importance to workspaces, whether individual (for 55% of respondents), group (54%) or even flex-office (45%).

What do you consider to be the essential criteria for offices in the future?



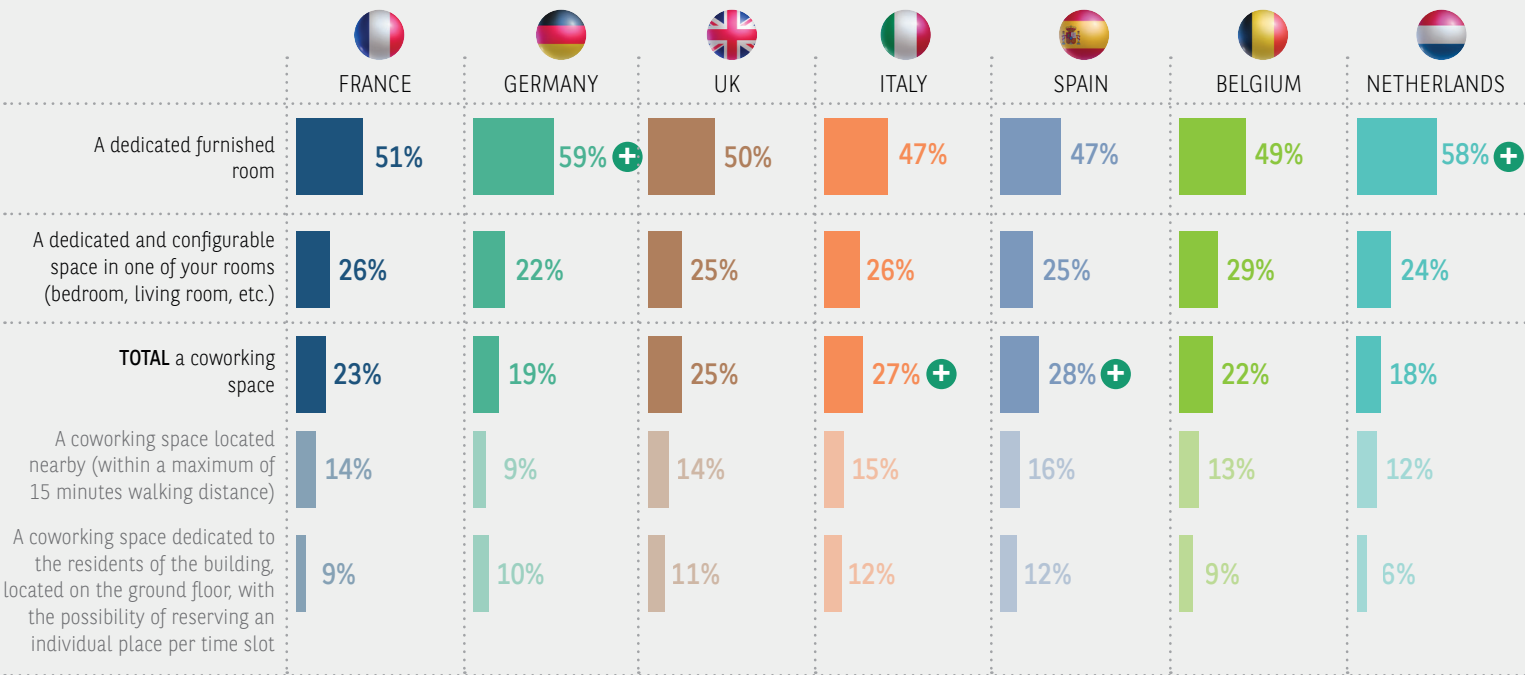
* Note on the total: those who cited more than one item are counted only once in the 'Total services'.

Total over 100, interviewees may have given several answers

PREFERRED ARRANGEMENTS FOR WORKING FROM HOME



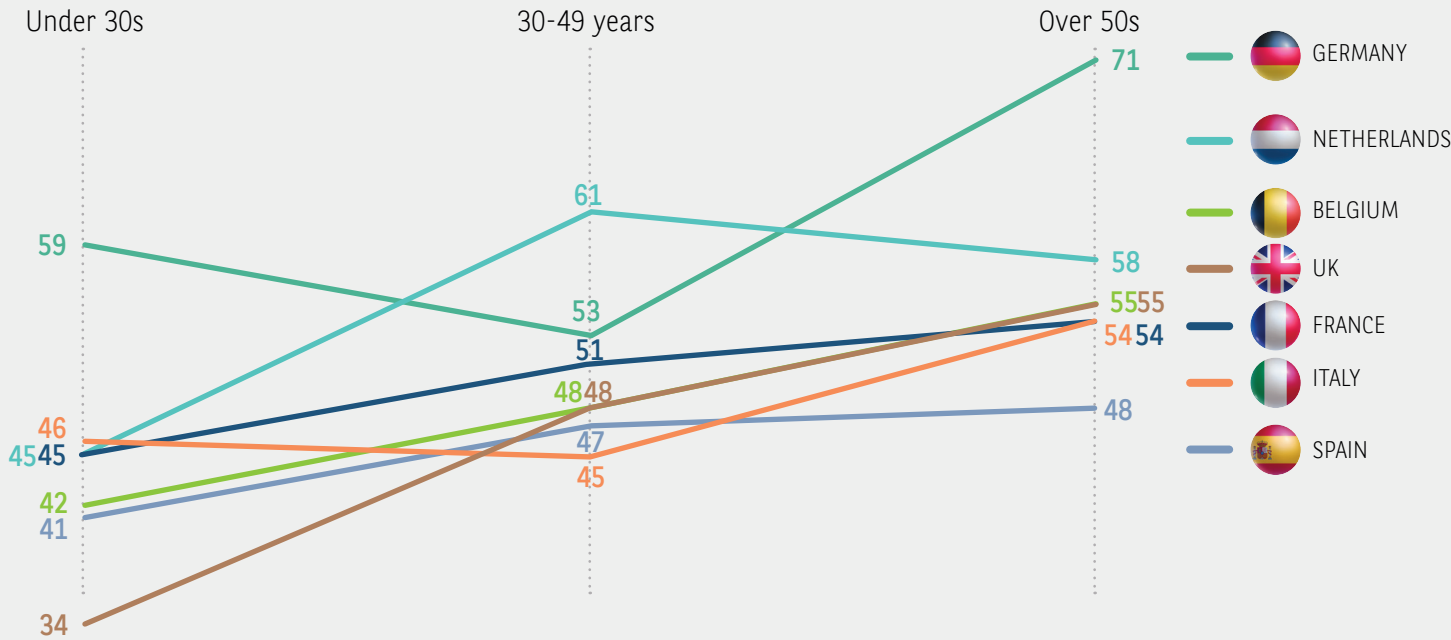
To work better from home, you would like your future home to have...



For all countries, the optimal layout for working from home is a dedicated furnished room: 59% of German employees and 58% of Dutch employees prefer this arrangement. Flexible space in one of the rooms in the home (bedroom,

living room, etc.) and coworking are then chosen fairly evenly by employees, although there is a slight preference for the first option in France, Germany, Belgium and the Netherlands.

A DEDICATED ROOM: PERCEPTION VARIES ACCORDING TO THE AGE OF THE RESPONDENT



Employees over 50 are especially keen on the dedicated room: 71% in Germany, 55% in the UK and 54% in Italy prefer this arrangement. The dedicated room is also much preferred by employees who usually have a separate office, as well as by those who have a spacious home (5 rooms or more).

The under-30s are more drawn to coworking spaces, particularly in the Netherlands, Belgium and the UK. Employees who are used to working in flex-offices are also those who are generally more open to coworking spaces. With respect to the location of coworking spaces, employees prefer these to be close to their home rather than in the same building.

KEY TAKEAWAYS FROM THE SURVEY

The Europeans surveyed were very divided on whether the office should be **"more than a place to work, a place to spend time and meet people"** (51% for the French people that agreed vs 49% who considered it to be solely a place to work where they preferred to spend as little time as possible). The UK and the Netherlands stood out as the countries with firmer positions: 70% of the English consider the office to be just a workplace, while 61% of the Dutch consider it to be a place to spend time and meet people. **Lastly, the preference for one or the other is more generational:** in most European countries, young people are more likely to consider the workplace as a place to spend time and meet people (e.g. in France, where 66% of respondents under 30 years of age said so, compared with 51% on average).

Criteria deemed to be essential to the offices of the future are quite varied.

Services inside or near the workplace is the most important criterion in France and Germany (both 50%) and the second most important in Italy (47%) and Belgium (47%).

A greater emphasis is put on the workplace in the UK, Spain and the Netherlands, but their preferences differ:

- The UK, much more than its European neighbours, believes that offices are workplaces only, and prefers private and individual concentration spaces (53% vs. 43% for group workplaces).

- Spain prefers spaces where people can work in groups (56% vs. 32% for individual spaces)
- The Netherlands encourages both types of space to the same extent (55% for individual spaces, 54% for group work), and even flex-office (45%), whereas other European countries are much more cautious with regard to hot desks.

France has the highest preference for services and leisure spaces (50% for services, 46% for office space for social events) the same as for actual workspaces!

Nevertheless, there are two common features between these countries. Services tend to stand out as essential to future offices while **soft mobility and flex-office space are seen as the least essential**, coming last in each country. Only the Netherlands stands out on these two points (greater flex-office expectations, and fewer services).

The preferred layout arrangements for working from home are broadly the same for all countries. **In each country, a home with a dedicated room is perceived as the best solution for working at home** (51% for the French, for example). Next, a dedicated, adaptable corner in one of the rooms of the home or coworking spaces are both cited (26% and 23% of the French respectively). In practice, the choice of layout seems to be determined more by the age of the interviewees than by their country of origin, with the Europeans most interested in coworking spaces being young people under 30 years old (30% in France for example vs. 23% of all French people).

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