

Quick Insights

Back to normal? Data from global cities tells a different story.

As countries across the globe lift Covid-19 restrictions to varying degrees, there's a collective sense that we're heading "back to normal." In some respects, I feel it in my day-to-day life, whether flying between our studios for work or to client sites, eating out at restaurants, or attending family events — activities that felt so ordinary prior to Covid-19.

I've been thinking a lot about what "normal" means for our work lives moving forward — and it's what we spend all day every day speaking to clients about. After surveying data from major cities — including London, Sydney, Singapore, New York, and San Francisco — I'm not sure we're rewinding the tape back to pre-pandemic days where the office demanded our physical presence five days a week.¹

Instead, what mobility and labor data across these cities suggests to me is a shift, one that is defined by agency and flexibility. Agency and flexibility in how we structure our days, where we choose to live, where we choose to work, and when we choose to work. Flexibility doesn't mean the end of the office or the decline of cities, but instead their evolution.

As the pandemic falls further and further into the rear-view mirror (we hope), I'm convinced both companies and cities have an exciting opportunity ahead — to rethink the creation of environments and experiences that enable flexibility, engender belonging, and help attract top talent for the long haul.

The data tells us that the work equation remains changed.

We're not commuting into the office as much.

- Mobility data across major cities confirms what I've anecdotally heard from clients and peers alike — fewer people are going into the office regularly.
- Use of public transportation dropped 13% to 56%, while visits to workplaces were down anywhere from 4% to 53% at the start of May 2022, compared to pre-pandemic levels according to [Google Community Mobility Reports](#).
- Commuters reduced the amount of time spent in traffic by 33 hours in 2021 compared to pre-pandemic levels according to [Tom Tom](#) data.
- Migration out of certain high-cost cities, like [San Francisco](#), coupled with an exodus of international talent has further impacted movement within cities.

Labor shortages are becoming more acute across the globe.

- Migration out of cities, border closures, and an exodus of international talent has similarly exasperated skill gaps and labor shortages across cities.
- For example, [London](#) is struggling to fill nearly 1/3rd of vacancies due to applicants lacking relevant skills; 42% of London businesses believe recruitment will continue to be an issue over the next five years.
- Many individuals of working age have decided to leave the workforce all together to take up early retirement, re-prioritize their life's ambitions, and in some cases, take on [childcare fulltime](#).

The Great Reshuffle — employees are in the driver's seat.

- After an onslaught of [resignations](#), unemployment rates are returning to pre-pandemic levels, but job vacancies continue to climb.
- Job vacancies have increased 55% in London, 64% in Sydney, and 127% in Singapore since the onset of the pandemic.²
- Thanks to a hot labor market compounded by skill gaps and labor shortages, workers currently have a smorgasbord of choice.
- Employees have agency and are adapting to the mindset of a consumer — they're looking for better work environments, culture, management, and career development.

1. Data analyzed include [TomTom Traffic Indices](#) and [Google Community Mobility Reports](#) to better understand movement around cities as well as labor data from respective government agencies to understand the impact of Covid-19 on labor markets of interest.
2. Job vacancy data analyzed: [London](#), January 2020 versus April 2022; [Sydney](#), February 2020 versus February 2022; [Singapore](#), December 2019 versus December 2021

My take on all this data:

Employees across the globe expect more than just office space from their employers. Companies that fail to listen and act accordingly risk losing their most vital and costly asset—talent.

What's changed?	Considerations:
Employees are in the driver's seat.	<ul style="list-style-type: none">• Employees have more agency than ever and are determining for themselves how work will fit into their greater lives.• Flexibility now considered "table stakes" when evaluating job opportunities.• Like consumers, employees are seeking out company "brands" that maintain a holistic commitment to ESG, DEIB, professional development, and well-being .
Work is no longer a place, but an activity and an experience.	<ul style="list-style-type: none">• Flexibility is here to stay, but that doesn't mean the office is dead.• Companies have an opportunity to define the role that physical space will play within their organizations.• The most impactful spaces will leverage experiential design to create meaningful touchpoints for teams—draw them into the office for a purpose.
Technology that enables hybrid work is essential .	<ul style="list-style-type: none">• Companies need to invest in technology—and instill a culture of supporting that technology—to enable hybrid work across teams.• In turn, companies will need to develop best practices around hybrid work.• The goal of any tech and accompanying best practices: to drive a culture of flexibility, inclusion, and belonging across the organization.
Inaction is your biggest risk.	<ul style="list-style-type: none">• If labor data is any indication, employees have choice and expect more than a salary and desk from their employers.• While there's a desire to have all the data before making longer-term decisions, companies cannot afford indecision.• The consequences of doing nothing may ultimately result in a drain on your talent.



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