

20

ANNUAL
WORKPLACE
REPORT

22

FROM DATA TO DECISIONS

MEASUREMENTS

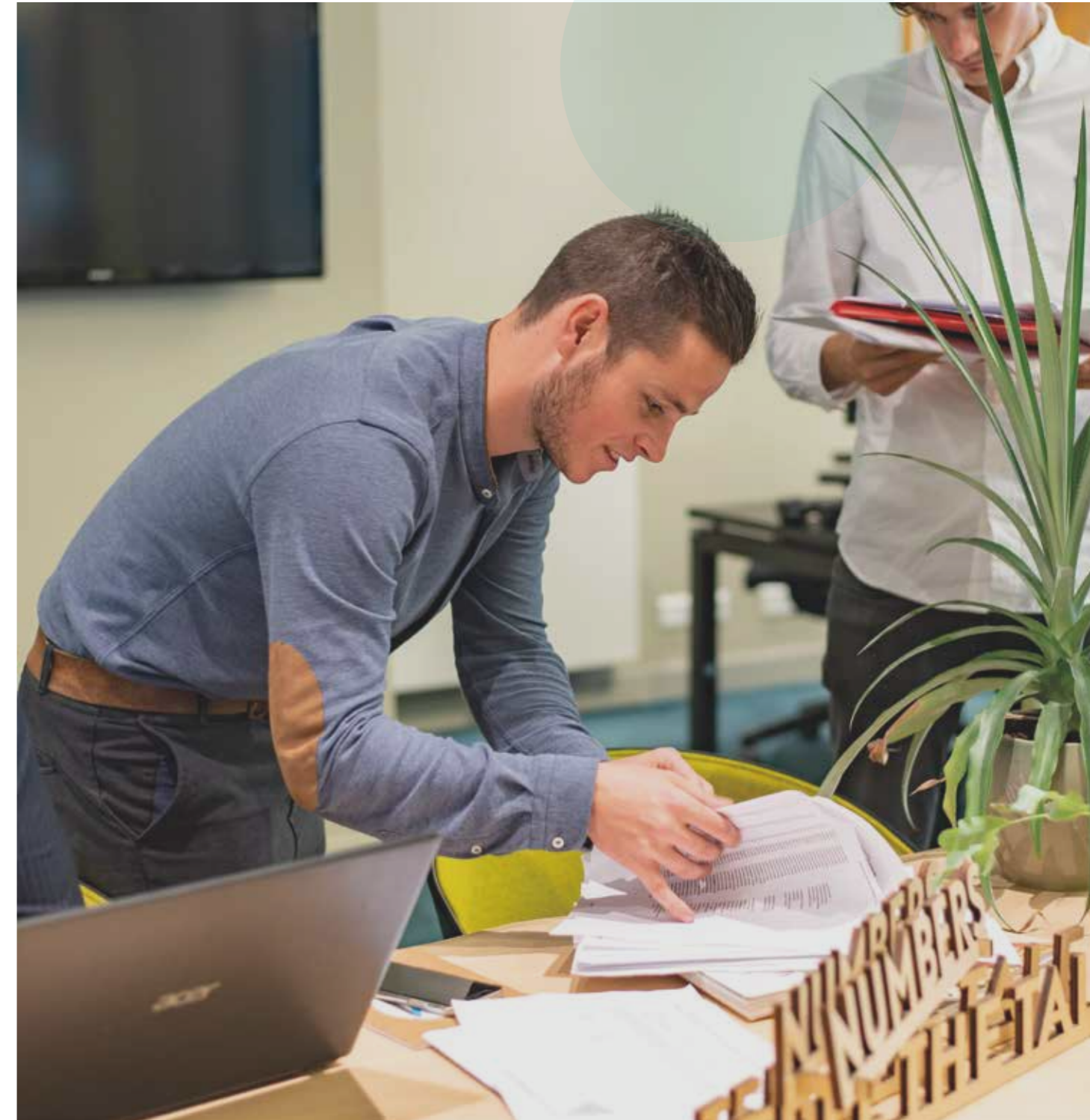


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Glossary

Individual low concentration work	Individual work alone, self-defined as requiring low concentration
Individual high concentration work	Individual work alone, self-defined as requiring high concentration
In-person meeting	Meeting with colleagues where all people are physically present
Hybrid meeting	Meeting with colleagues where some people are physically present and other people digitally (through phone or video)
Digital meeting	Meeting with colleagues where all people are digitally present (through phone or video).
Break	Relax moment during a workday.
Occupancy	A space (meeting facility or workstation) is regarded as occupied when it is in use regardless of the number of people using it.
Other	Non-defined other activity.
Office	The workspace owned or rented by the employer, functioning as headquarters of the organisation.
Remote working	Working from anywhere but the office.
Hybrid working	Hybrid working is when the work week exists of a combination between working in the office and remote.
Utilisation	Utilisation is an efficiency measure and is defined as the number of people using the space in relation to the capacity of the space.



Foreword

A message from our CEO

The world is rapidly changing, with new challenges emerging every day. The global economy has been hit hard by the COVID-19 pandemic, leading to recession, job uncertainty, and rising inflation. As a result, many companies are facing difficult decisions about their workforce, their workplace, and their real estate portfolio. In this environment, it is more important than ever to have accurate and reliable data and workplace analytics to guide decision-making.

One area where data can be particularly valuable is in workplace management. Companies that can gather and analyse data on how their employees are using their workspace can make informed decisions about how to optimise that space for the future. This can include everything from determining the right amount of square footage per employee to create a workplace that supports different work styles and activities.

By collecting data on how employees are using their workspace, companies can gain valuable insights into how to create a more productive and efficient workplace. This can help them to make decisions that improve employee satisfaction, reduce costs, and increase productivity. In a world where companies must do more with less, it's essential to have accurate and reliable data and analytics on workplace usage.

In this year's Annual Workplace Report, we will explore the importance of data collection in the workplace and how it can inform decision-making in a fast-changing world. We will discuss the benefits of collecting and analysing workplace data, as well as the challenges of doing so. By the end of this report, readers will have a better understanding of why workplace analytics is so important and how they can use it to make better decisions for their business.

In addition to discussing the importance of data collection in the workplace, it's important to note that we have historic data over the last five years that can provide valuable insights to readers. By looking at examples from various industries and workspace types, readers can benchmark their own office footprint and gain new insights into how to optimise their workspace. This benchmark data can be used to compare workplace usage across countries and industries, providing a more comprehensive view of how companies are using their space. With this data, readers can identify areas of opportunity for improvement and make informed decisions about how to optimise their workspace for the future. Whether you're a small startup or a large corporation, having access to this benchmark data can help you make better decisions about how to use your workspace more efficiently and effectively.



Vincent le Noble
Founder & CEO

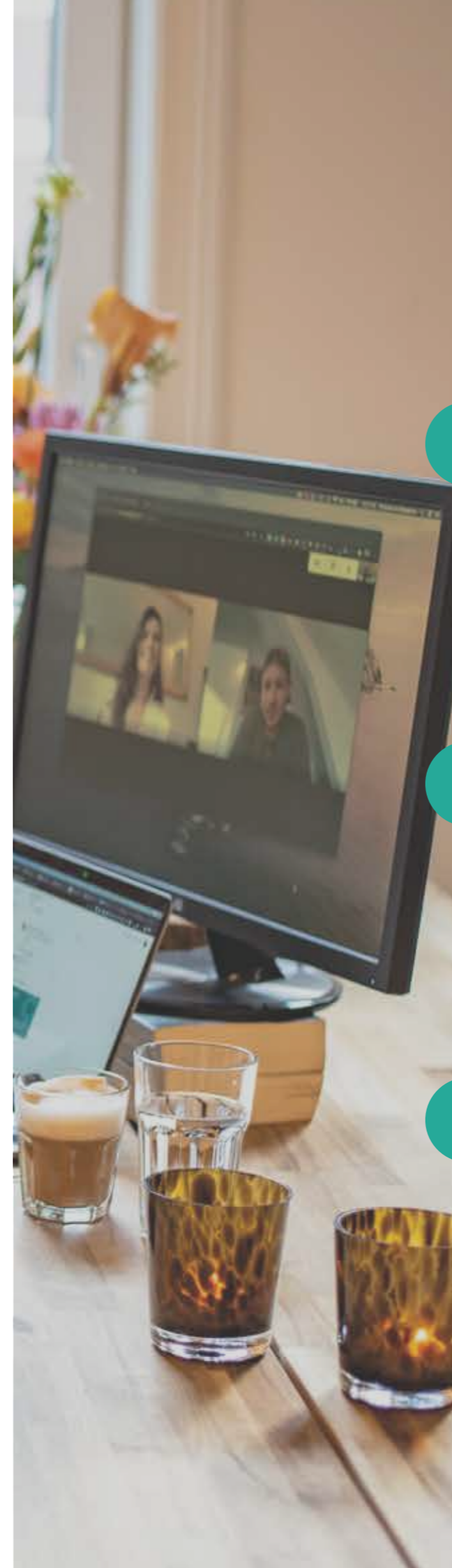
It's essential to have accurate and reliable data and analytics on workplace usage.

Introduction

In the future, the year 2022 might become known as the year that was pivotal in workplace management. As many countries were still flickering between lockdowns in early 2022, a new way of working emerged. Hybrid working turned out to be a very natural way of working. An evolution from the combination of the personal benefits of working from home and the social collaboration benefits of working at the office. In March 2022, the online event: [how to make hybrid work a success](#) guided attendees to this new way of working.



Figure 1. Factors needed to make Hybrid work a success



When the offices opened up and organisations needed data on actual usage again to make decisions, the effects of hybrid working were directly noticed. Working remotely was well-received, leading to individuals commuting to the office for only a few days per week. But contrary to Measurement's expectations, data showed that the office did not become the social clubhouse that everyone was talking about. In May, a [first article](#) was published about this. In a [follow-up analysis](#), in June, Measurement showed that people were starting to use the office in a different way, like more individual calling and video-conferencing in the meeting facilities. Considering the low occupancy and high percentage of individual and digital work at the office, concerns raised about [loneliness at the office](#) as a threat to hybrid working.

The 2022 Annual Workplace Report delves deeper into the progress of office occupancy and utilisation for the remainder of the year. Moreover, the accumulation of all projects gave much more reliable insights gathered across various industries. Are we truly adopting hybrid working or are we bouncing back to our old way of working? In this Annual Workplace Report, Measurement looks back to the pre-pandemic data, to understand how the world of work and workplaces have changed. And using both old and new data, expectations can be made of how it will become.

An overview

Measuremen's mission is to 'improve workplaces worldwide'. In 2022, 134 projects across 22 countries around the globe have been performed. Those countries can be added to the existing list of measured countries.

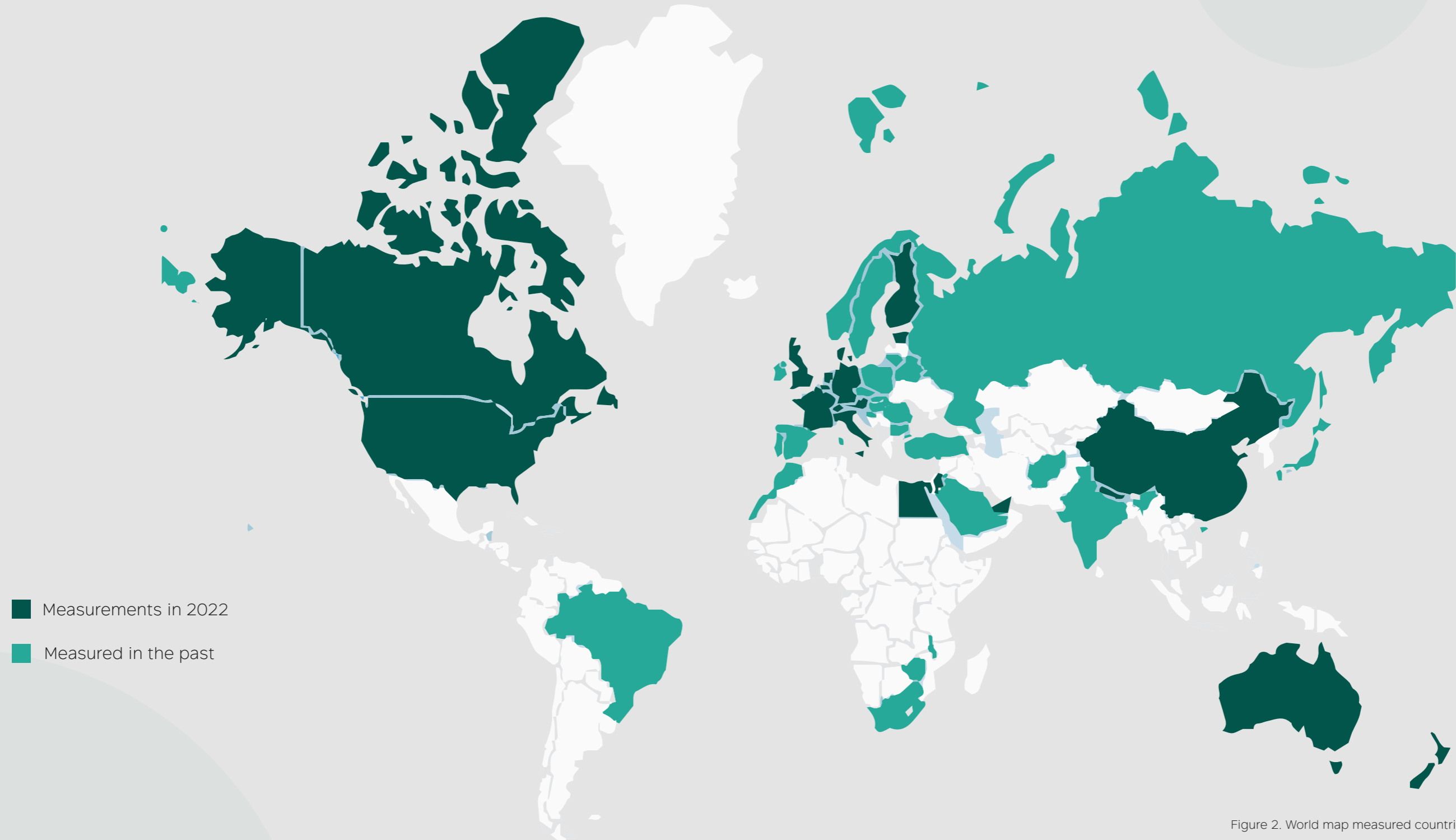


Figure 2. World map measured countries

134
projects

140,947
workstations

25,767
meeting areas

22
countries

Office design

Work can be described as a variety of activities, from computer work to physical meetings, to calling, reviewing, and video conferencing, all to reach a common purpose. However, the effectiveness of this work should align with how an office is designed. Office spaces should allow these activities for all employees present in the office. This ratio of activities and thus spaces might however vary between employees, and organisations on a larger scale. To extend the scope of a research, it can be seen as the ratio between seats designed for collaboration work (26.4%), and individual seats (73.6%). In general, this shows that workplace designers believe that most of the work of their employees is in the form of individual work at workstations.

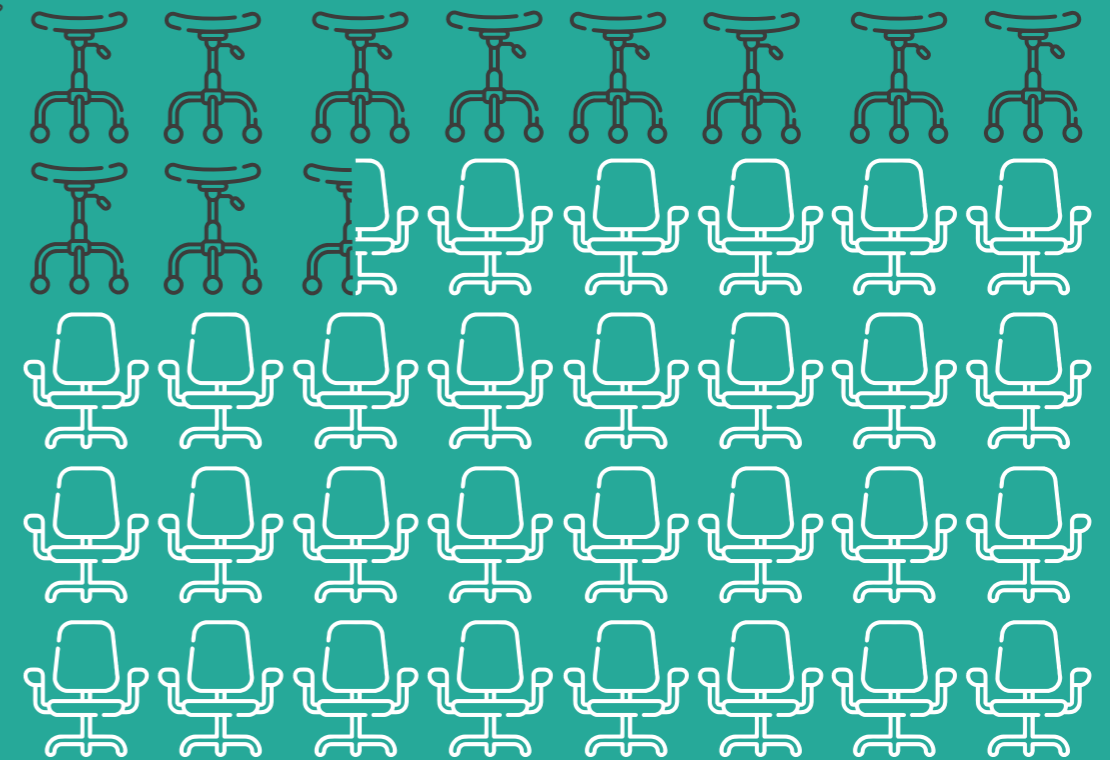
Looking at collaboration areas alone, the most (38%) seats are in closed meetingrooms, 18% in booths, 18% in break-out areas, 13% at consulting tables, and a few ones in different spacetypes. Spaces designed for individual work are predominantly fixed desks (75.1%), followed by office desks (11.1%) and a few other types.

The data thus shows that many offices are design for individual work, but there are only a few spaces designed specifically for video conferencing, which is more frequent today.

The important question that rises: does this design align with activities that employees are performing at their desks? In the upcoming chapters this will be further investigated.

Collaboration seats

26.4%



73.6%

Individual seats

Figure 3. Ratio between collaboration and individual seats



Occupancy

The overall average occupancy measured in 2022, is 30.4%. This is much lower compared to the pre-pandemic period. In 2019 for example, the average occupancy was 50.4%, a 20% decrease today. It seems that many people are still working from home, while offices are not reduced in their relative capacity. Overall, it seems that employees have adopted hybrid working, but there have been no physical changes to the physical workplace in terms of capacity. It might be that workplace managers are still waiting to take action or/and don't have the means to make physical changes. .

Active occupancy

Although the average occupancy is 30.4%, 8.1% is due to signs of life. Signs of life means: a space is observed as occupied while there are no people present. For example, signs of life include an open laptop, a jacket on the chair, or cups and papers on the desk. Subtracting 8.0% from the 30.4%, the "active occupancy" pops up. On average, the active occupancy in offices is 22.4%.

Desk occupancy

Differentiating occupancy across meeting areas and individual spaces, rates a desk occupancy of 31.6% and a meeting area occupancy of 24.5%. Relatively, the meeting areas are less occupied compared to the individual desks. This is still aligned with the article published in May '22 showing that ["the office is not becoming a social clubhouse"](#). This Annual Workplace Report shows that the past months didn't show any changes towards this trend. In a later chapter, this will be further investigated.

Preference for fixed desks over flex desks

Looking at the occupancy of different types of desks, the fixed desk is the most popular desk. In general, the fixed desk is most often observed, and its relative occupancy is the highest at 32.5%. On the low occupancy side, the rates are for hot desks 17.1%, and touch-down desks 5.0%. Touch-down desks are observed relatively often in offices compared to their occupancy, indicating low effectiveness. Together this indicates that people do prefer to sit at fixed desks, while the flexibly oriented desks are hardly occupied.

Preference for closed meeting spaces

Closed meeting rooms show to be the most popular in terms of occupancy (39.6%). Meeting rooms are also the most common meeting spaces, namely 37.5% of meeting spaces are meeting rooms. Conference rooms (34.3%), pantries (30.6%), meeting pods (22.2%), and phone booths (15.3%), are spaces that are relatively highly occupied in comparison to how common they are. While on the other side, breakout areas (11%), consulting tables (10.6%), and booths (15.4%) are relatively lowly occupied but are quite common in the workplace.

Looking at the ratio between occupancy and occurrence, it seems that conference rooms are being missed in the workplace, while break-out areas and consulting tables are there to waste. Conference rooms became more popular with hybrid work, while consulting tables seemed to be unused open social spaces that fill the workplace. Although consulting tables weren't that popular pre-pandemic, data shows that nowadays people prefer closed meeting spaces. This might be due to the need of privacy for video meetings, or/and social isolation needs.



30.4%

Average occupancy

22.4%

Active occupancy

31.6%

Desk occupancy

24.5%

Meeting area occupancy

39.6%

Meeting room occupancy

10.6%

Consulting table occupancy

Words from our in-house researcher

Although this Annual Workplace Report showed that the office is not becoming the social clubhouse yet, this doesn't mean that it shouldn't be. The world is changing rapidly and the way of working has seem to be evolved organically for most organisations. Many employees take their autonomy with their office/remote ratio while many managers do have an office space to fill and want to be able to manage their employees. This dyad has led to the 30% occupancy we see today.

The main driver that guided this dynamic seems work-process driven. If employees are able to do their work from home, they can. But if employees aren't functioning well, managers might use the office as a tool to support employees. Social control, community feeling, tools, and mentoring are some of the mechanisms that the office can provide for better employee performance. And managers often use a few of them as arguments to make their employees come to the office and perform better.

However, since employees do generally well while working from home, many of these mechanisms have been dismantled since the pandemic. A desperate manager might argue that the lack of face-to-face interaction destroyed his ability to check on employees, broke the community feeling, and was detrimental to employee engagement and social learning. And this might be true in many ways. But many remote employees didn't lose their community feeling, they just traded the "forced" work community towards people they intrinsically loved: family and friends at home. Moreover, the lack of commuting gave them more space to engage in their own hobbies. So for many employees, work has become a lean activity of just doing enough to satisfy the manager, receive their payment, and spend more time on things they love to do.

So maybe a question for the desperate managers could be: why can't your employees do what they love at your company? We know that people do love social connections, they want to be meaningful and develop their skills. Organisations can be a powerful tool to support employees in their journey. Feeling needed, having a good impact, learning, having fun, and having a (great) source of income are perfect leverage points for any manager to play with. And the office is here a good tool to support it.

Shifting work towards something that employees experience as meaningful will make them more productive. Facilitating a fun work environment that stimulates learning, mentoring, and social fun makes people want to come to the office. But coming to the office is not the goal, it's a tool that makes all these things possible. Searching for what employees love to do, while finding the symbiosis with the organisational goals might be the next step that will make the office a social clubhouse after all.



Can your employees do what they love at your company?

JUSTIN TIMMER

Organisations in transition

Every organisation is different

Although the primary goal of this Annual Workplace Report is to show the trends in workplace use across the world, it is good to realise that there is huge variation across organisations. The sector, the workplace policies, the company culture, the time of the year, and other factors hugely influence the actual occupancy for each organisation. In other words, occupancy differs a lot between organisations. While some organisations have transitioned, or are transitioning back to the old way of working, other organisations are moving towards mainly remote working, while many are somewhere in between.

Transitioning organisations

Looking at individual projects, 11% of organisations are having an occupancy rate of lower than 20%. This indicates a shift towards mainly remote working in these organisations. While on the other side, 22.2% of the organisations have an occupancy rate higher than 40%, which implies a return to the old averages seeing pre-pandemic. While the rest, 66.8% of the organisations, have an occupancy rate between 20% and 40%. This implies acting within the hybrid working spheres.



11%
towards remote



66.8%
hybrid



22.2%
towards the old way of working

Occupancy across months

To get further insights into the evolution and adoption of hybrid working, it's necessary to get a closer look into occupancy across time.

Looking at the average occupancy across months, no trends are seen towards a specific direction. Although this might differ for individual organisations, the general trend remains relatively constant, with occupancy hovering around 30.4%. This implies that most organisations have adopted a new way of working in a stable office/remote ratio. It could also be the case that effects are counteracting each other. For example, one organisation might transition back to working at the office while the other is moving fully remote, showing no change on average.

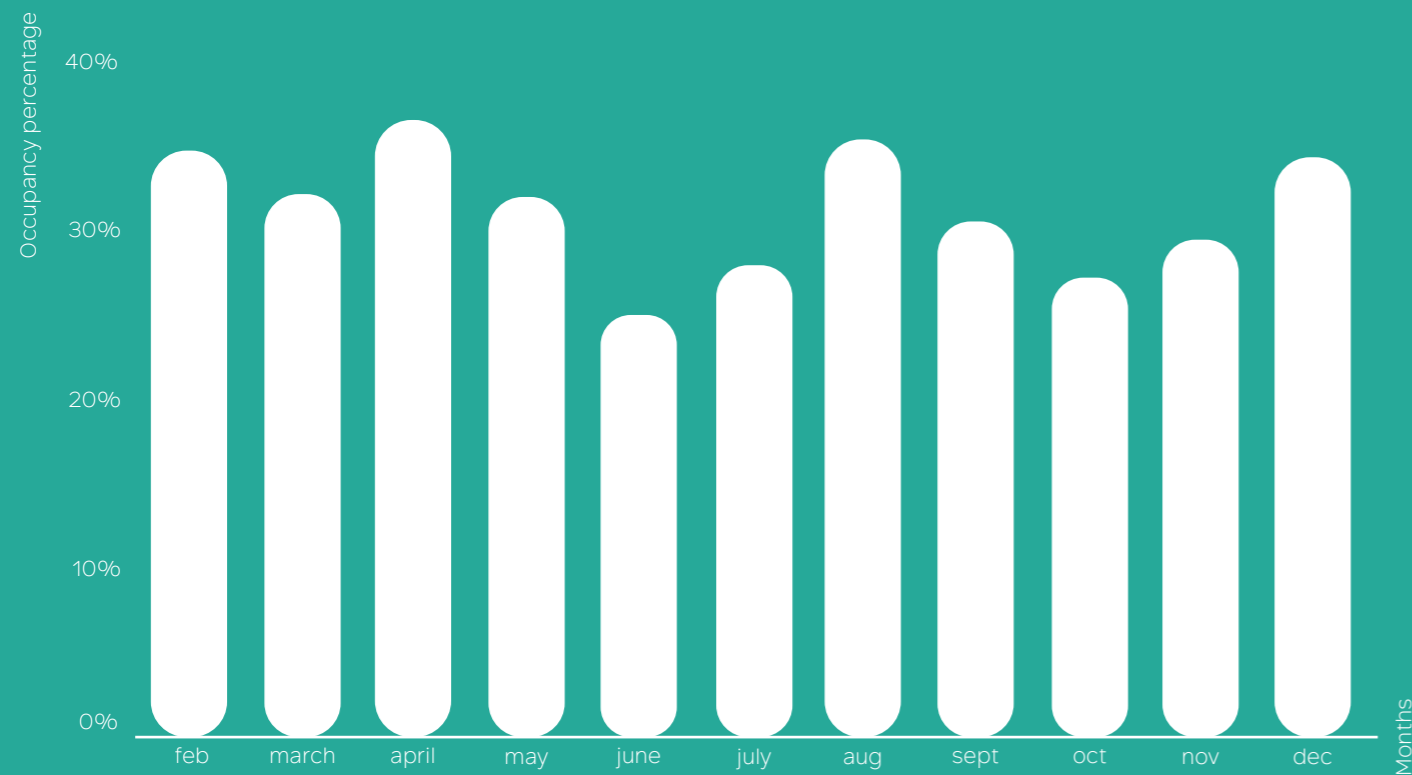


Figure 4. Occupancy across the months

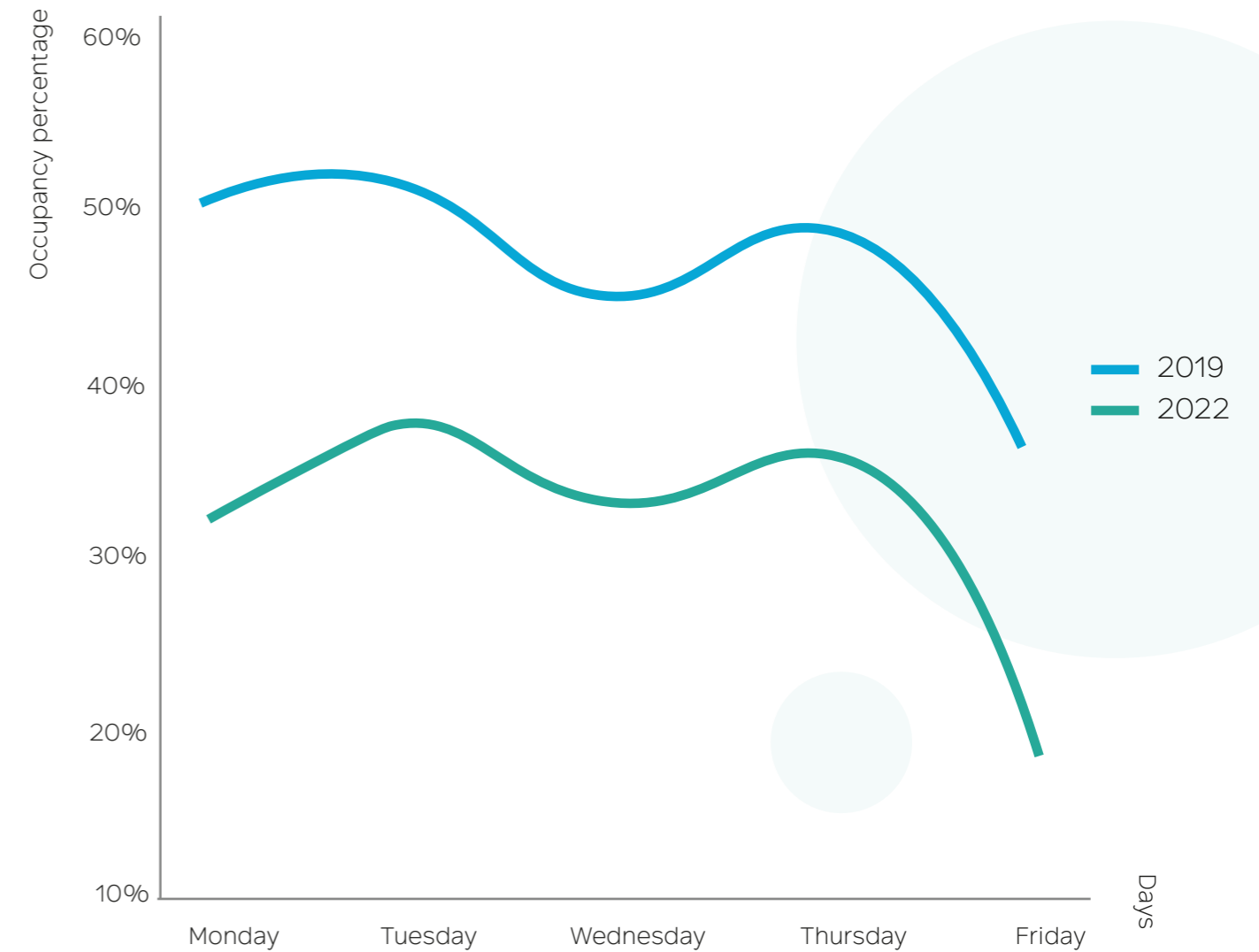


Figure 5. Occupancy across the week

The bird pattern spreads his wings

Looking at occupancy across the week, a “bird pattern” manifests; relatively low occupancy on Monday and Friday around the weekend, peak days on Tuesday and Thursday, and relatively low occupancy on Wednesday. It is striking how this bird pattern became much more prevalent in 2022. Compared to 2019, the occupancy on Fridays became really low (18.7%). Mondays took a relative dip (32.1%), and Wednesdays as well (33.7%). The Wednesday dip can be partly explained by the fact that in the Netherlands (where a large portion of the studies are performed), children are free in the afternoon. This likely causes parents to work remotely on this day. While working at home around the weekends also has similar reasons.

Activities

After looking into occupancy across different desks and meeting spaces, it's time to start diving into the occurring activities at the workplace. During a Workplace Observation Study, observable activities are categorised according to the frequency in the office. Remembering the office design chapter, 73.6% of the seats are designed for individual work and 26.4% for collaboration work. If offices are designed adequately, similar activity patterns will be found here.

Overall, 74% of the activities observed are individual activities, while the remaining 26% of the activities are spent on collaboration work (meetings (15%), video conferencing (7%) and calling (4%)). Computer work takes up a large proportion of the individual work with 49%, followed by mobile computer work (19%). While miscellaneous work (4%), and reviewing (1%), complete the circle diagram.

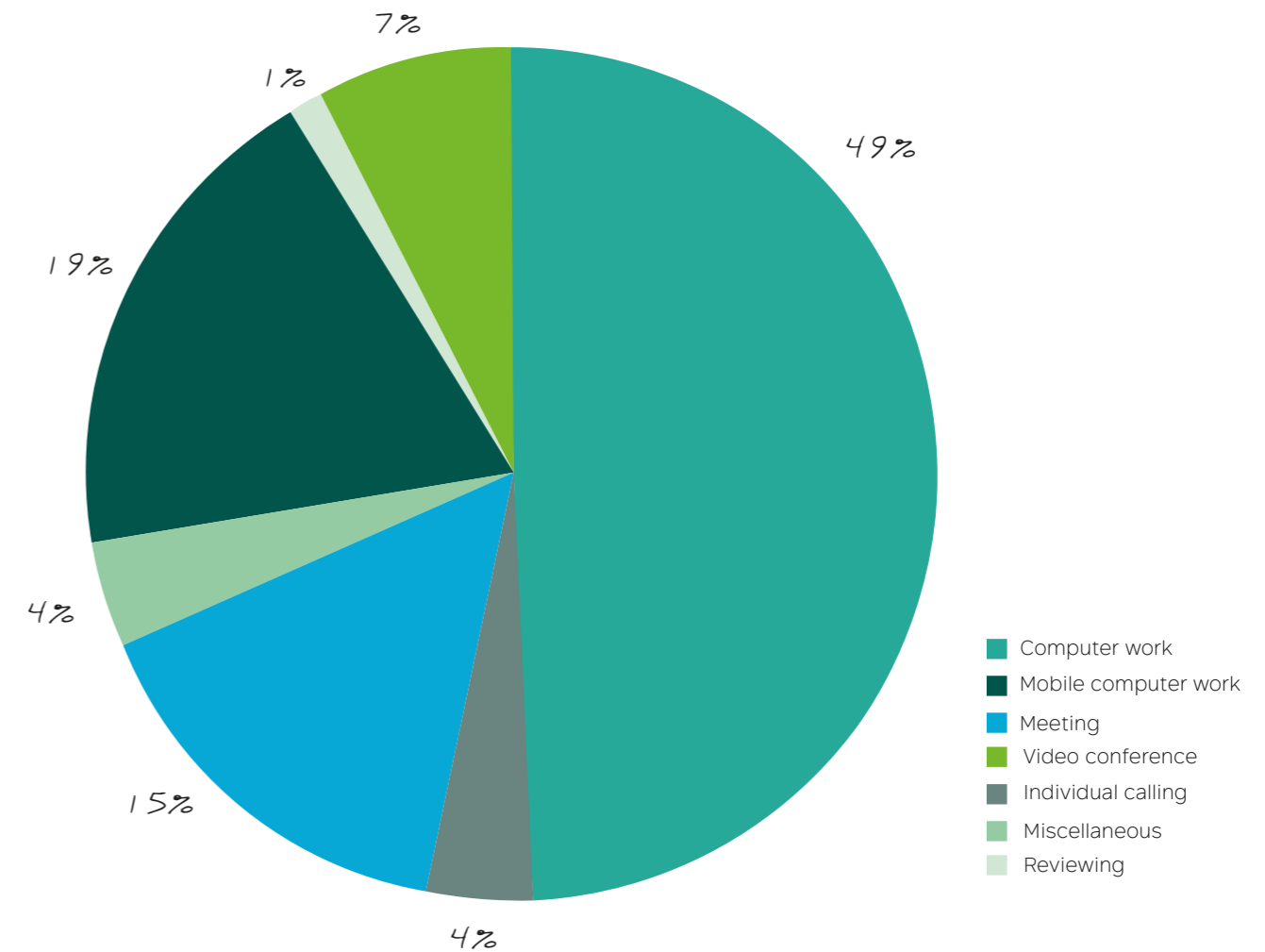


Figure 6. The activities in the office across all workspaces

Interestingly, these activity percentages are almost exactly aligned with the percentages of collaboration seats compared to individual seats in offices. 74% individual versus 26% collaboration work seems to be the magic number that shows up in the seats and the activities that people perform. It can only be wondered whether the design of the space shapes the activity behaviour of the users, or whether the workplace managers carefully design the space to match up with the activities of the users. But it could also be an interchanging process that evolved towards a perfect match between the space and the activities.

Nevertheless, although on average there might be a perfect match, this might differ between organisations. In the following chapters a further research will be done, investigating if this match sustains looking more closely at different types of spaces and activities.

Office

To understand the evolution of the activity patterns at the office, a comparison between 2019 (pre-pandemic) and 2022 (post-pandemic) has been made. Activities are separated into activities performed at individual workspaces and at meeting areas.

The rise of computer work

Looking at activities at individual workspaces specifically, it is observed that people perform computer work 59% of the time, followed by mobile Computer work (19%). In May '22, a [preliminary article](#) showed a high increase in mobile computer work. However, in the past few months, this has stabilised and even decreased. Compared to 2019, computer work increased 13% (from 46% to 59%) while mobile computer work decreased to 18.8%. Although small differences, even meetings at the desk decreased by 1.7%, and calling also decreased by 2.2%.

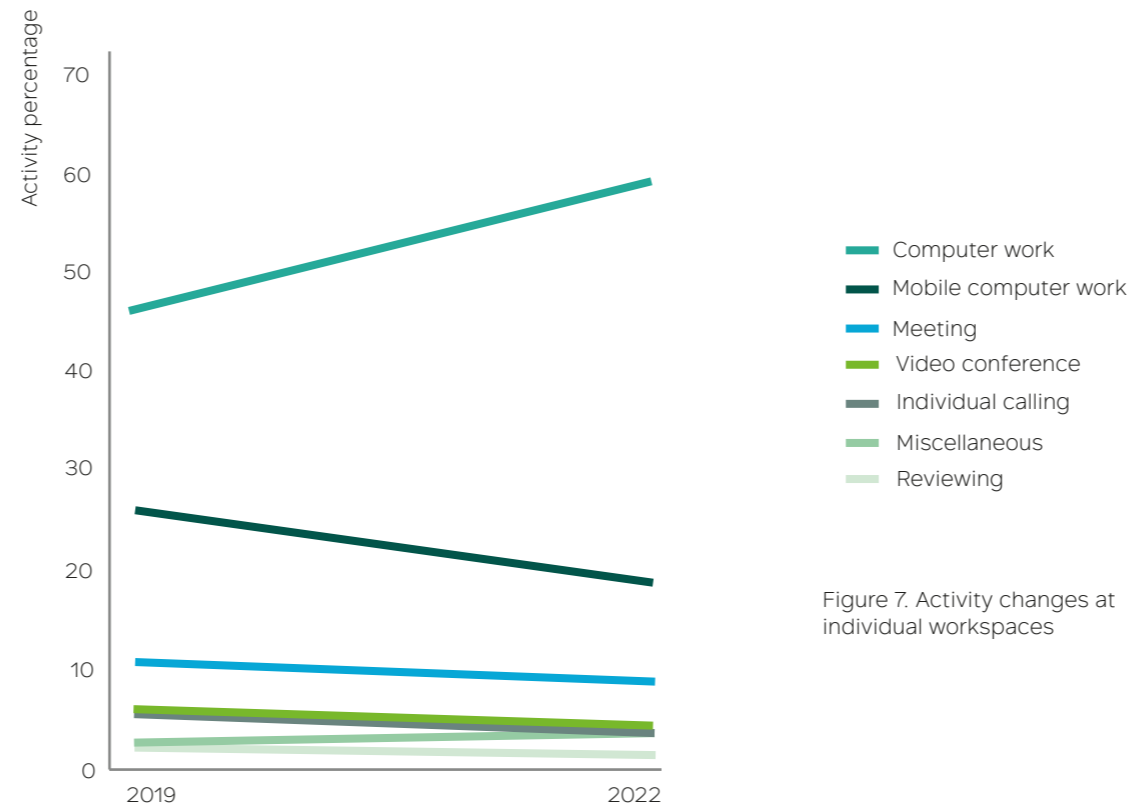


Figure 7. Activity changes at individual workspaces

Fewer meetings in meeting areas

In meeting areas, a decrease in physical meetings can be seen due to a drop from 61% to 44.9%. Although physical meetings are still the most occurring activity, this 16.1% decrease is quite substantial. While on the other side, video conferencing took a huge rise, increasing by 17.5% (from 3.9% to 21.5%). This is accompanied by a small increase in mobile computer work in meeting areas, but a drop in miscellaneous activities.

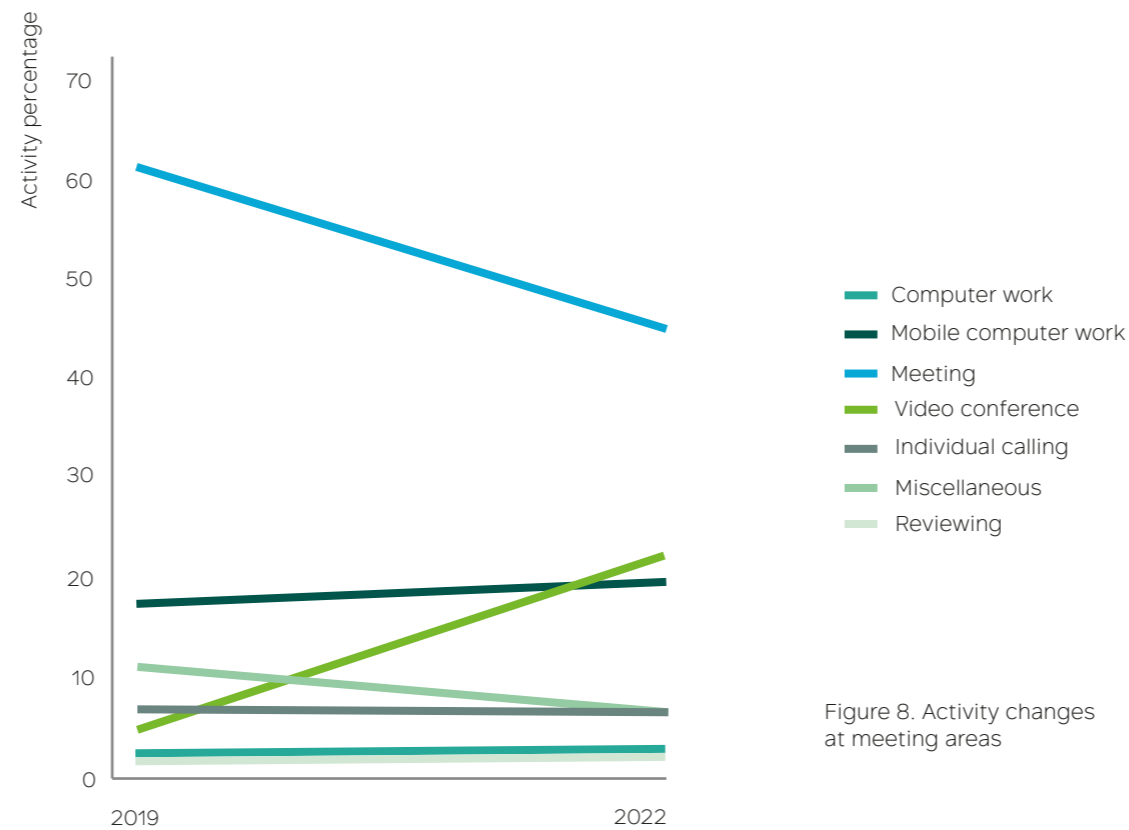


Figure 8. Activity changes at meeting areas



Activity pattern of an average office worker

The average day of an office worker starts between 8:30-9:00. The early birds usually start with (mobile) computer work. Conference rooms are occupied early in the day, and between 10:00-12:00 the peak occupancy in meeting rooms (45%) and conference rooms (39%) occurs (see page 28). This inadvertently causes 29% of “signs of life” at the desk: people leave their desks but keep them occupied while they are residing in the meeting spaces. Around 12:00 the percentage of signs of life dramatically increases to 47% as people move to the company restaurants (63% occupancy), where some employees stay until after 13:00. Next to the restaurant, the booth (46%) and the pantry (22%) have their peak occupancy around 12:00, while the other meeting facilities dip down.

Directly after lunch, at 13:00, meeting pods and consulting tables experience peak occupancy with 28% and 13% respectively. The occupancy of meeting rooms (43%) and conference rooms (36%) increases again after lunch but doesn't reach the same occupancy rates as in the morning. In the afternoon, around 16:00, most employees move back to their desks as computer work rises again to 38%, while some people start to make relatively more phone calls around 17:00 (6%). While also a large part of the people started travelling back home again.

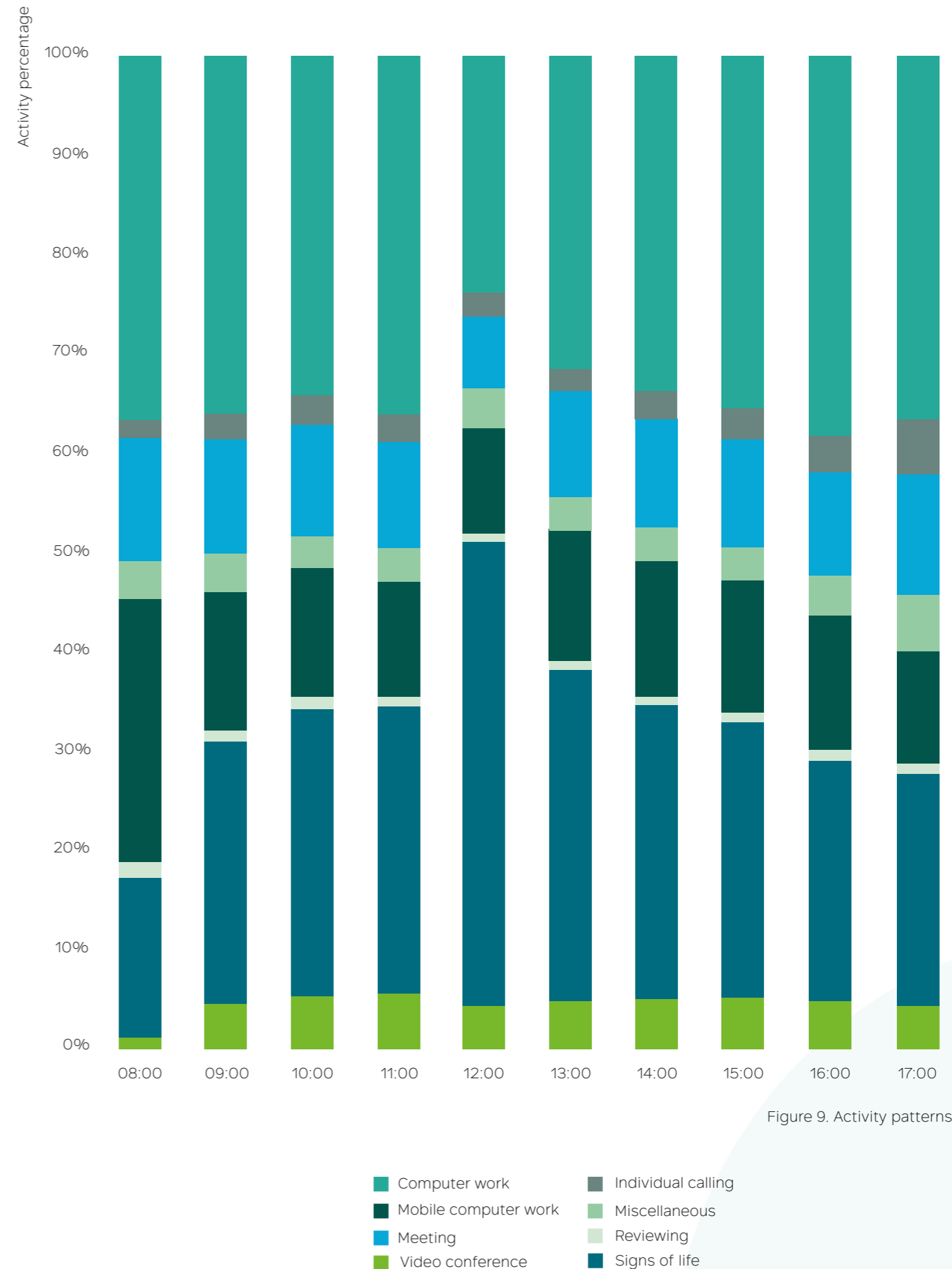
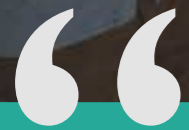


Figure 9. Activity patterns across the day

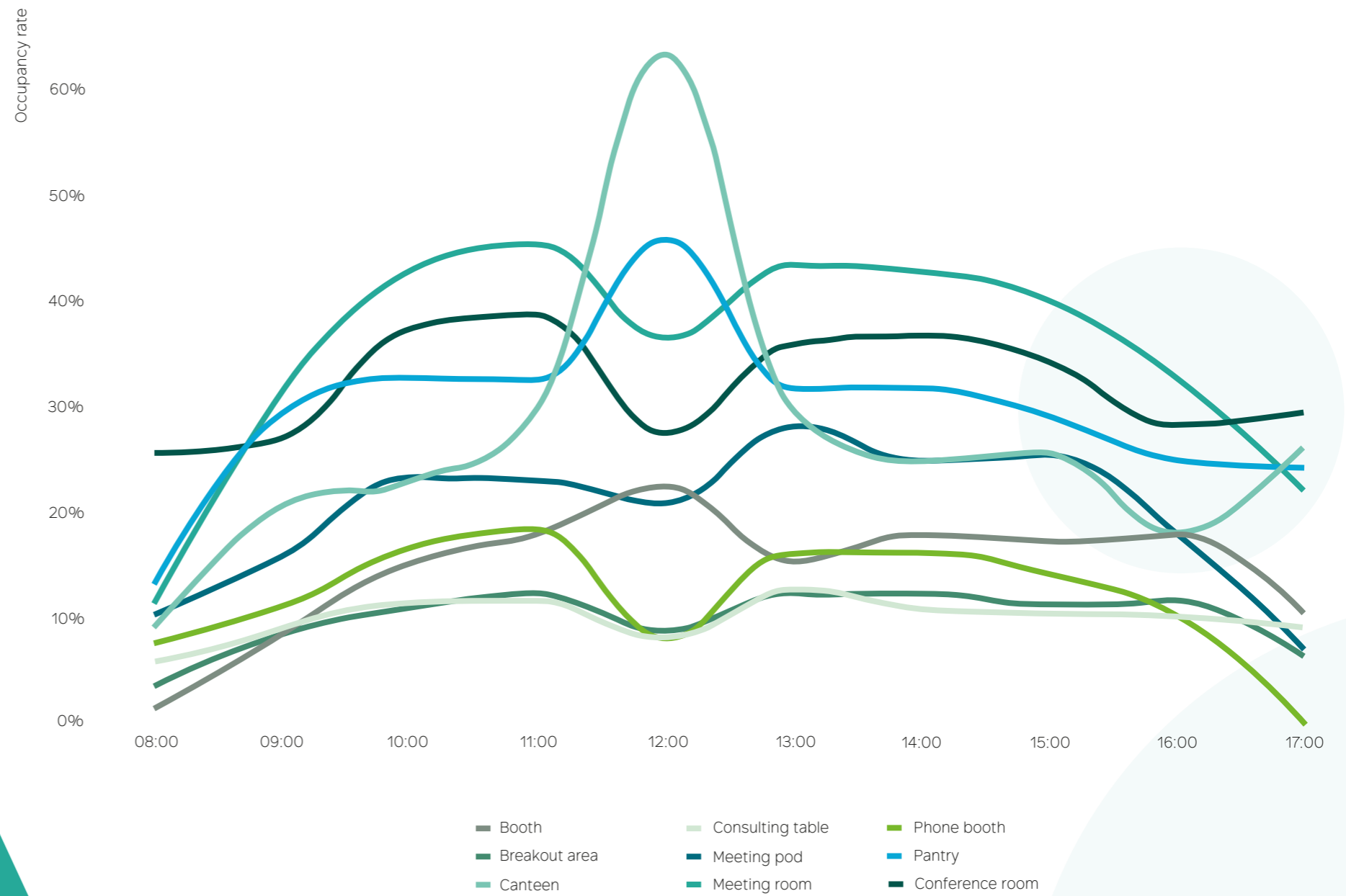


Peak at lunch time in the canteen?

In order to solve those cue's we need to make people aware that they are not IN a cue, they ARE the cue.

Pattern of meeting areas

The data in the graph below shows that although occupancy is not always that high in most places, a dynamic pattern emerges. Office workers desire to use different places at different moments across the day. They flow from one space to the other, occupying multiple different spaces since they require different scenery to do different tasks. Accordingly, most organisations also have twice as many seats compared to employees to facilitate this dynamic and handle the peaks. The accompanying result of this is suboptimal occupancy rates on average.



Meeting facilities

Meeting facilities come in different shapes and sizes. From huge conference rooms to small meeting pods. There are differences in capacity but also in terms of their design. These aspects have an influence on their occupancy, utilisation and activities. For efficient use, workplace designers aim for high occupancy, utilisation, and fitting activities in the space. In this chapter, these aspects across different meeting facility capacities and meeting facility types will be explored.

Capacity

Meeting facilities are designed to have a certain capacity. The capacity is defined as: the number of people for which the space is designed. However, the actual people using this space can vary strongly. This percentage is defined as utilisation. In the graph on the right, the green line displays utilisation. Spaces with low capacity show high utilisation. But when capacity increases, the utilisation drops. This implies that larger spaces are often used by, relatively, only a few people.

On the other side, meeting spaces also have an occupancy rate. No matter how many people are in a meeting space, if there is someone in the space, it is occupied. The data shows that meeting spaces with low capacity are usually not occupied that well (although this differs strongly on the type of space as discussed earlier). Nevertheless, spaces with higher capacity are usually occupied very well.

In general, it shows that large spaces attract more people even if they are with only a few people. It seems people are usually not bothered by the fact that this causes low utilisation of these spaces.

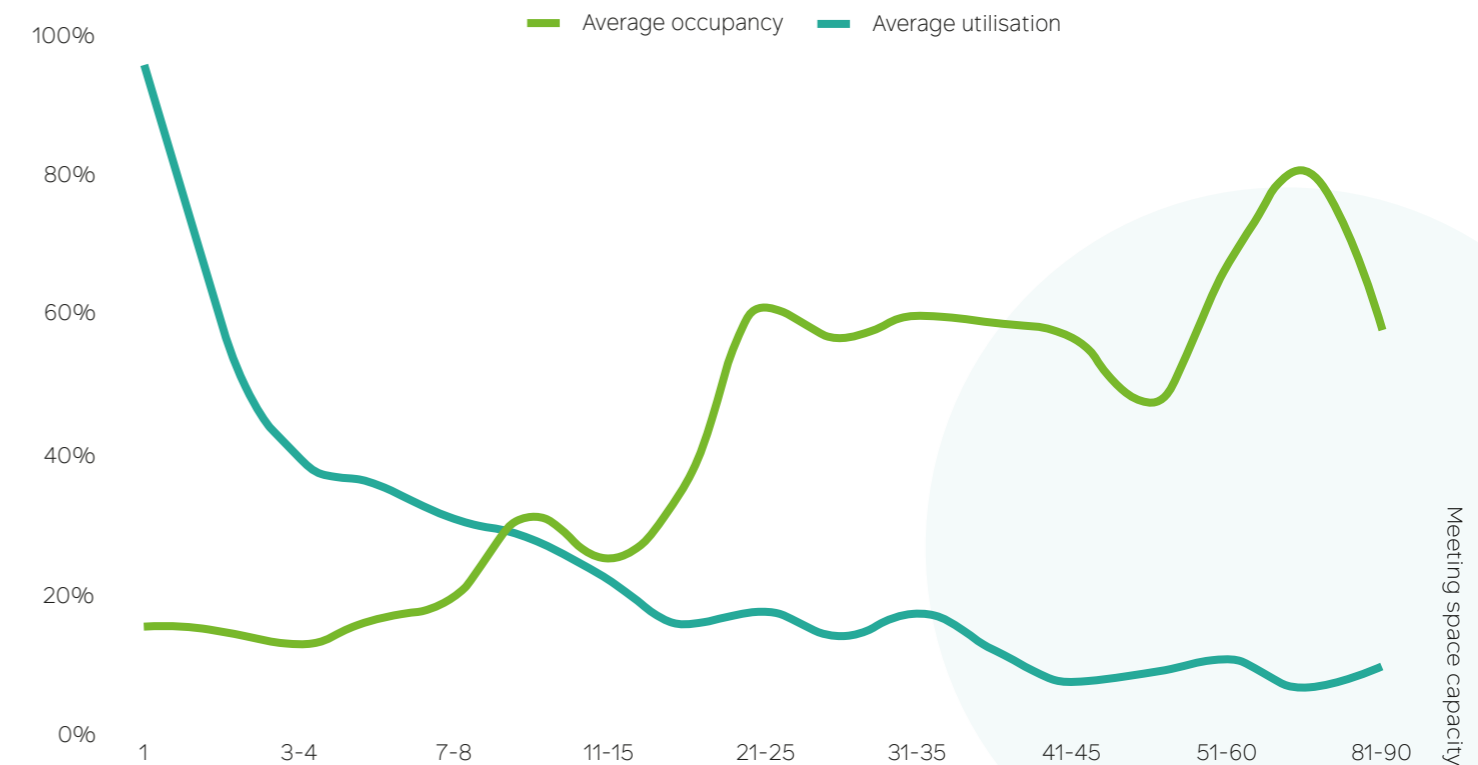


Figure 11. Utilisation and occupancy across meeting space capacity



Activities across meeting space

There are various types of facilities across the office that facilitate and nudge their users to show specific types of behaviour. The design of these spaces makes people want to sit there and use that space for that particular activity. However, depending on several factors such as design, crowdedness and laziness, people can use spaces quite differently. For example, in spaces that are designed for collaboration, 34% of the activities are individual activities. Mobile computer work (19%) and individual calling (6%) are examples of activities that people like to perform in these collaboration spaces.

CONFERENCE ROOM

- 34% Highly occupied, low occurrence
- 71% Most popular space for meetings
- 13% Of activities are video conferencing



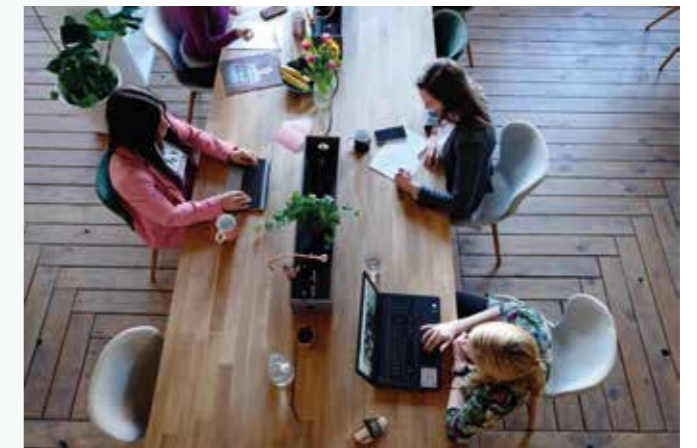
BOOTHS

- 34% Highly occupied, high occurrence
- 71% Most popular space for meetings
- 13% Of activities are video conferencing
- 22% Occupancy 2-person booth
- 16% Occupancy 1-person booth



CONSULTING TABLE

- 11% Low occupied, high occurrence
- 56% Used for meetings
- 20% Used for computer work



MEETING POD

- 22% High occupancy compared to their occurrence
- 18% Used for meetings
- 35% Used for video conferencing
- 27% Used for mobile computer work



Sectors

As shown in the occupancy chapter, there is a large variation in occupancy percentages across organisations. It could be assumed that a large proportion of this variation could be explained by the sector in which an organisation operates. In one of Measuremen's blogs ([the science of remote working](#)), it becomes clear that some professions or organisational styles don't fit with remote working. Dependency on facilities/tools, confidential information, interpersonal contact, or management styles could all be reasons to prefer to have people work at the office.

Looking at the graph on the right, a relatively high occupancy is seen in the finance sector (36.5%). This might relate to the confidential information these organisations work with, resulting in relatively high occupancy. Nevertheless, pre-pandemic, the finance sector also showed high occupancy rates (59.1%). Retail, on the other hand, shows low relative occupancy (25.2%), it also showed low occupancy rates pre-pandemic (43.9%).

It seems that sector-specific mechanisms have a continued effect on the occupancy rates that date from pre-pandemic times. This indicates that no drastic cultural shifts have emerged from the pandemic that led to dramatic changes in occupancy, except for more remote work which affected each sector.

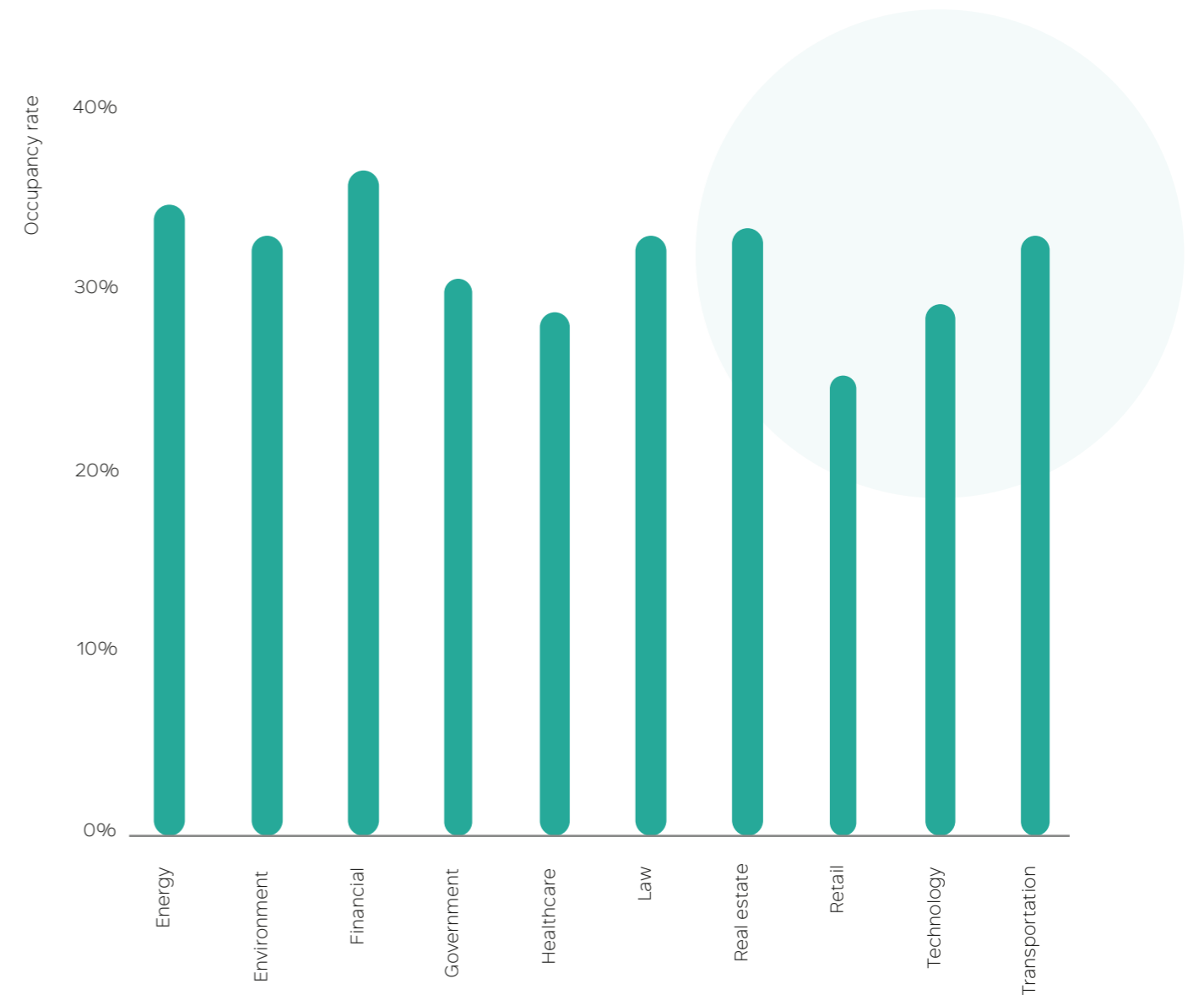


Figure 12. Occupancy across sectors



Overall conclusion

In general, data shows that most organisations have adopted hybrid working in 2022. More people are working remotely, causes lower occupancy percentages and different behavioural patterns at the office. First of all, showing that workplace managers have not changed the workplace, in terms of size or design towards hybrid working. However, this could be due to a selection bias. Workplace managers usually consult Measurements to collect objective workplace data before they make important decisions in order to improve their workplace. On the other hand, Measurements often also performs regular occupancy “check-up” studies for workplace managers who are periodically interested in their occupancy and activity patterns. Considering the relatively large dataset of this Annual Workplace Report, and the fact that these findings are in line with other research ([source](#)), makes this data give a good indication of general workplace trends.

A perfect match

Although the general occupancy is relatively low, specific changes in workplace use, such a low occupancy on Friday, and the differences in activities show that something fundamentally has changed in the way of working. Although the percentage of individual work and seats (74%) compared to collaboration work (26%) perfectly match up, on a deeper level, employees struggle to find the perfect workplace and to utilise it properly.

Employees are struggling

The striking increase in video conferencing in meeting areas indicates that employees struggle to find a good place to communicate with people outside their office while needing to do this quite frequently. This is reflected in high occupancy but low frequency of closed meeting spaces. People search for conference rooms, meeting pods, phone booths and pantries, probably to ensure good audio quality while not disturbing colleagues. Open meeting areas such as consulting tables or breakout areas don't seem to work for these activities and fulfil rather the role of space-filling eye candy while being hardly occupied except for a small peak after lunch.

Desirable or not, at the end of 2022, the office does not seem to have evolved towards [a social clubhouse](#) and it doesn't show signs of becoming that. Low occupancy rates indicate threats of [loneliness at the office](#). At the office, people are rather searching for isolation to communicate with their remote colleagues and focus on their work. While the low occupancy around the weekend also indicates that people also pivot towards spending more time at home with their family or friends while avoiding commuting.



The office does not seem to have evolved towards a social clubhouse

A contradictory development

Data shows that people at the office perform individual work and aim for isolated spaces for video conferencing. [JLL's Future of Work survey](#) showed that 73% of the 1,095 surveyed corporate decision-makers shared that they are already making plans, like making office spaces more open and collaborative, with no dedicated desk spaces. While these same decision-makers (or 77% of them) agree/strongly agree that offering remote/hybrid working will be critical to attract and retain talent. Unless video conferencing technology evolves that integrates remote workers perfectly in a collaborative office environment, it's seems to be quite a contradictory development.

Altogether, there is still quite some work to be done to optimise the office in facilitating employees' needs and the decision-makers' needs. Employees come for a reason to the office and if they can't fulfil their needs while being there, they might pivot more towards working from home, which then can cause a domino effect towards empty offices. On the other hand, 72% of the decision-makers desire that the office remains central to their organisation's ecosystems ([source](#)). Designing offices that improve company culture and facilitate effective individual spaces and collaborative spaces (albeit physical or digital), might make employees flock to the office again, with a Fear-Of-Missing-Out, when only working remotely.



The future of the workplace

Since hybrid working is being adopted effectively, the future of workplaces might revolve more around facilitating the needs and activities of employees regardless of whether they work at the office or from home. The workplace becomes a very fluid concept, as employees now just search for a place where they can work effectively while taking care of their work-life balance. This implies a focus on employee well-being and using the workspace to effectively support them. And workplaces can serve as many functions; a place to have fun, to focus effectively, or a place to boost your career. As discussed in one of [Measuremen's whitepapers](#), many employers are already shifting towards this direction as employee well-being improves productivity, attraction, retention, and reduces costs.

But at the same time, connecting remote workers with office workers is of top priority when it comes to workplace management. New (video conferencing) technologies such as Augmented and Mixed Reality might pave the path towards effective collaboration. But radical new asynchronous collaboration strategies might also do the trick.

And lastly, believing that data will take a more prevalent role in understanding and improving workplaces and employees. Having insights into the occupancy, utilisation, activities, and needs of employees will support future decision-makers in making effective decisions and improving workplaces worldwide. **What decisions will you make based on Workplace Analytics Data?**



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