MEASUREMEN

ANNUAL
WORKPLACE
REPORT

2018

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In this chapter we divided organisations on certain criteria and pointed out some curious differences.

A warm **welcome**

We have been measuring workplaces for more than ten years now. It all started with frustration, frustration about reactive nature of our industry. In our profession as facility, real estate or human resource manager, we need to be supportive and serviceable to the business needs. But in those same ten years I've seen the struggle to become proactive and make the subject of workplace a C-suite conversation.

I strongly believe in Maslow's hierarchy of needs model. In order to reach the top of Maslow's model, and thereby reach our full potential, we need to take small steps. These steps will lead us from unconscious incompetence to consciousness competence. That's why we developed the Workplace Maturity Model and steps to help you become more knowledgable and use objective insights to make the right decisions.

With our ten years of measuring experience in the workplace and a truly extensive database with workplace metrics we have matured as well. During 2018, Measuremen was active in 29 countries and we measured a total of 649,167 workplaces worldwide. I'm proud to present our fourth Annual Workplace Report, containing even more data and compared to the last three years. Please feel free to reach out to our in-house research team or any of our highly knowledgeable colleagues to learn what powerful workplace insights can do for your organisation. It is our goal to help improve more than 10 million workplaces worldwide by 2025. I hope that by sharing our insights, you will become more conscious of decisions that can be made to impove your workplace. decisions that can be made. Keep growing and never stop learning.

Vincent le Noble
Co-Founder and CEO

01
Overview

MEASUREMEN
Company **milestones**

2013

Brussels office

Measuremen opened its first international office in the spring of 2013.

2015

London office

We opened the doors of our London office at the end of 2015.

2017

Sydney office

Measuremen crossed continents and settled in Sydney, Australia!

2018

29 countries

2018 was our best year yet, with projects in 29 countries around the globe.

Our **statistics**

160,756

Number of workstations

203,537

Number of seats

297

Number of studies

29

Number of countries

" The **information** in this report is based on the data we collected in **2018** across all of our **projects.**

The way **we measure**

Measuremen has been measuring workplaces since 2003, and we have been perfecting our methods of measuring ever since. Today, we have two methods to perform workplace occupancy studies; through walkarounds and via sensors. There are a lot of differences between the methods, and both have their own advantages.

Walkarounds

In a study with walkarounds, an employee from Measuremen (called an observer) walks rounds in the worspace, measuring the type of desk, and assigns an activity to eachdesk. We have 9 different activities that we can assign (like computer work, calling, or simply not occupied), so we can get very detailed insights into the working patterns at any office. To get insights into occupancy over time, we perform 6 to 8 rounds per day, usually over two weeks.

Sensor projects

In a sensor study we can measure the occupancy of a desk every six minutes. However, the sensor can only measure whether a desk is occupied or unoccupied.

The downside is that we cannot measure the broad range of activities. This gives a more objective view on office occupancy because it is not dependent on the frequency that the observers can make their rounds.

Getting insights from data

With walkarounds and sensor projects, you can conveniently identify how your workplaces and meeting facilities are used, and assess their individual popularity. You can get all these insights through the Measuremen Portal; an online dashboard where you can easily see all of your aggregated data and detailed insights.

Lisanne Bakker
- Manager Operations Netherlands

Glossary

Activities

Computer work	Individual, immobile based work. Either on PC or docked laptop.
Mobile computer work	Individual, laptop or tablet based work.
Reviewing	Focus work, off-screen.
Miscellaneous	Other, personal and/or private usage
Individual calling	Individual calling through electronic means
Video conference	Virtual collaboration through electronic means
Meeting	Collaboration
Signs of life	In use but unoccupied, multiple signs of life.
Not occupied	Unoccupied, no signs of life.

Desks

Fixed desk	Normal / standard allocated workstation.
Standing desk	Height adjustable workstation.
Office desk	Workstation inside an enclosed office.
Hot desk	Unassigned, normal/standard workstation.
Touchdown desk	Flexible workstation, different furniture (eg. high table), mostly provided with power sockets.
Focus desk	Cubicle / Workstation with a desk screen meant for individual focus work.
Specialised desk	Project desk, lab desk, desk connected to specialised equipment and intended for one unique purpose.
Focus booth	Small (semi) enclosed area for individual concentration work. Supplied with a desk.
Phone booth	Small enclosed booth used for individual calling. Often supplied with a landline phone.

Meeting facilities

Conference room	Larger meeting rooms, often provided with whiteboards/ projector, different furniture settings.
Meeting areas in open space	A meeting area designed for having meeting located in an open area in the workplace
Meeting room	A room with a meeting table, used for meetings or with multiple people.

Organisation sizes

This year, we measured across a range of different organisations. From small organisations with only 10 workspaces to larger organisations with 3,740 workspaces. In the statistics below we grouped our clients on the amount of workspaces, to get an insight into the sizes of our client base.
It seems that organisations of all sizes are all represented in our sample, giving us a more valid case to make generalisations.

24%
500 – 1,000
workspaces

24%
250 – 500
workspaces

33%
< 250
workspaces

19%
> 1,000
workspaces

02

Assets and occupancy

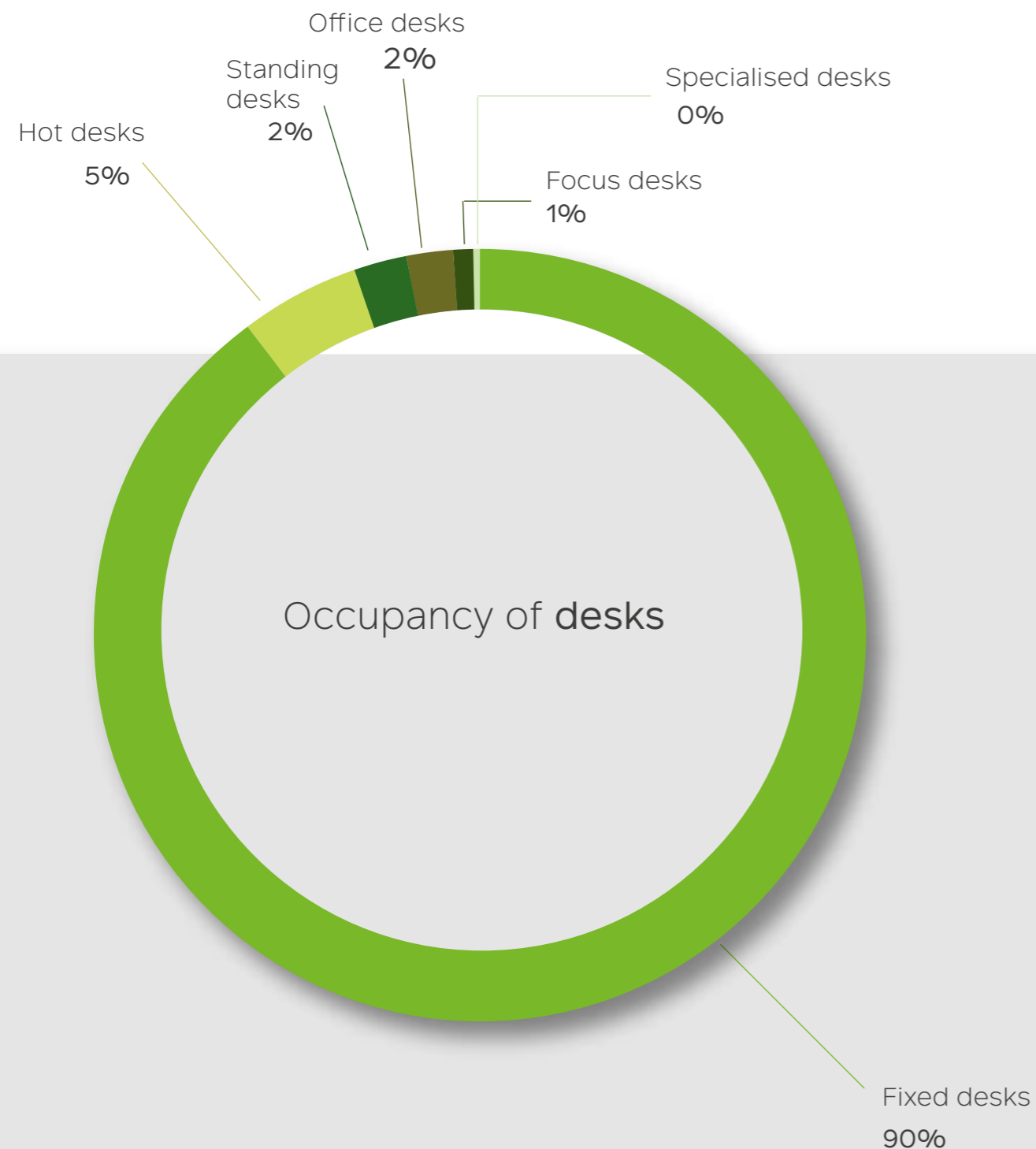> " The difference between **success** and **failure** is a great team.

Most of the work that gets done in the world is done behind a desk. The variety of desks used in offices around the world is huge. Each morning, people occupy their favourite desk and leave them again at the end of the day. During the day, workers perform a variety of activities at these desks, these activities might have an impact on the type of desk they work at.

In this chapter, we will dive into the statistics and patterns of workers at their desk.

Key insights

- The majority of desks in offices are fixed desks.

- Average workstation occupancy is 48%.

- Occupancy is lowest on Fridays.

Types of **desks**

The circle diagram below shows the distribution of desk types across offices. We can learn from the data collected that offices are predominantly filled with normal allocated fixed desks. Usually, there is only a small percentage of desks available for dedicated activities like focused or specialized activities.

Office desks
2%

Standing
desks
2%

Specialised desks
0%

Hot desks
5%

Focus desks
1%

Occupancy of **desks**

Fixed desks
90%

Occupancy of **workstations**

Data tells a story. In my experience, all client where we present the outcomes of our study, want to know how they compare to others.

Our data of 2018 show that average workplace occupancy is 48%. Before conducting an occupancy study clients tend to expect higher occupancy rates. Mind you, the 48% occupancy here includes desks that are in use but where no one is present. If we deduce these from the statistics "physical occupancy" drops to approximately 34% only.
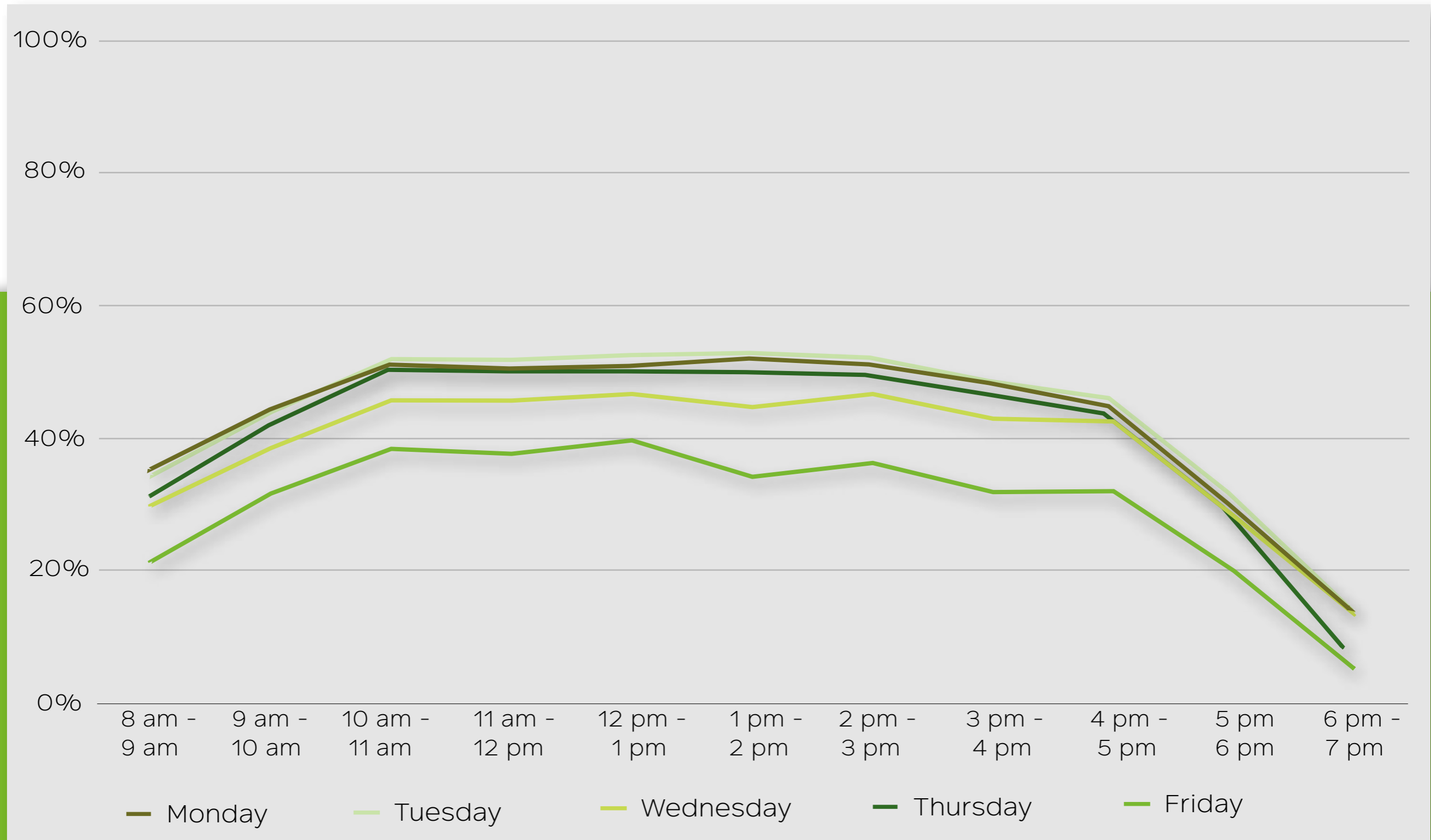
There is an apparent gap between people's expectations and reality. We often perceive a workplace to be "quite busy" when two out of three workstations in an office are being occupied. Hence, we tend to look for a "quieter" workplace. Moreover, employees tend to stick to their "own area", resulting in inefficient occupation of the workspace.

Larger organisations usually have a lower occupancy. I was involved with an occupancy study for a large organisation in Amsterdam. Its building had around 2,100 workspaces. The results of our study indicated that, at peak occupancy, less than 1,000 workspaces were being occupied. Whether it leads to happier employees or cost savings, the outcomes or our occupancy studies are always an eye opener to our clients!

Mariska van Nieuwkoop

- Senior Operations Manager

Occupancy of workstations **during the week**
Worldwide averages

	8 am - 9 am	9 am - 10 am	10 am - 11 am	11 am - 12 pm	12 pm - 1 pm	1 pm - 2 pm	2 pm - 3 pm	3 pm - 4 pm	4 pm - 5 pm	5 pm - 6 pm	6 pm - 7 pm

— Monday   — Tuesday   — Wednesday   — Thursday   — Friday
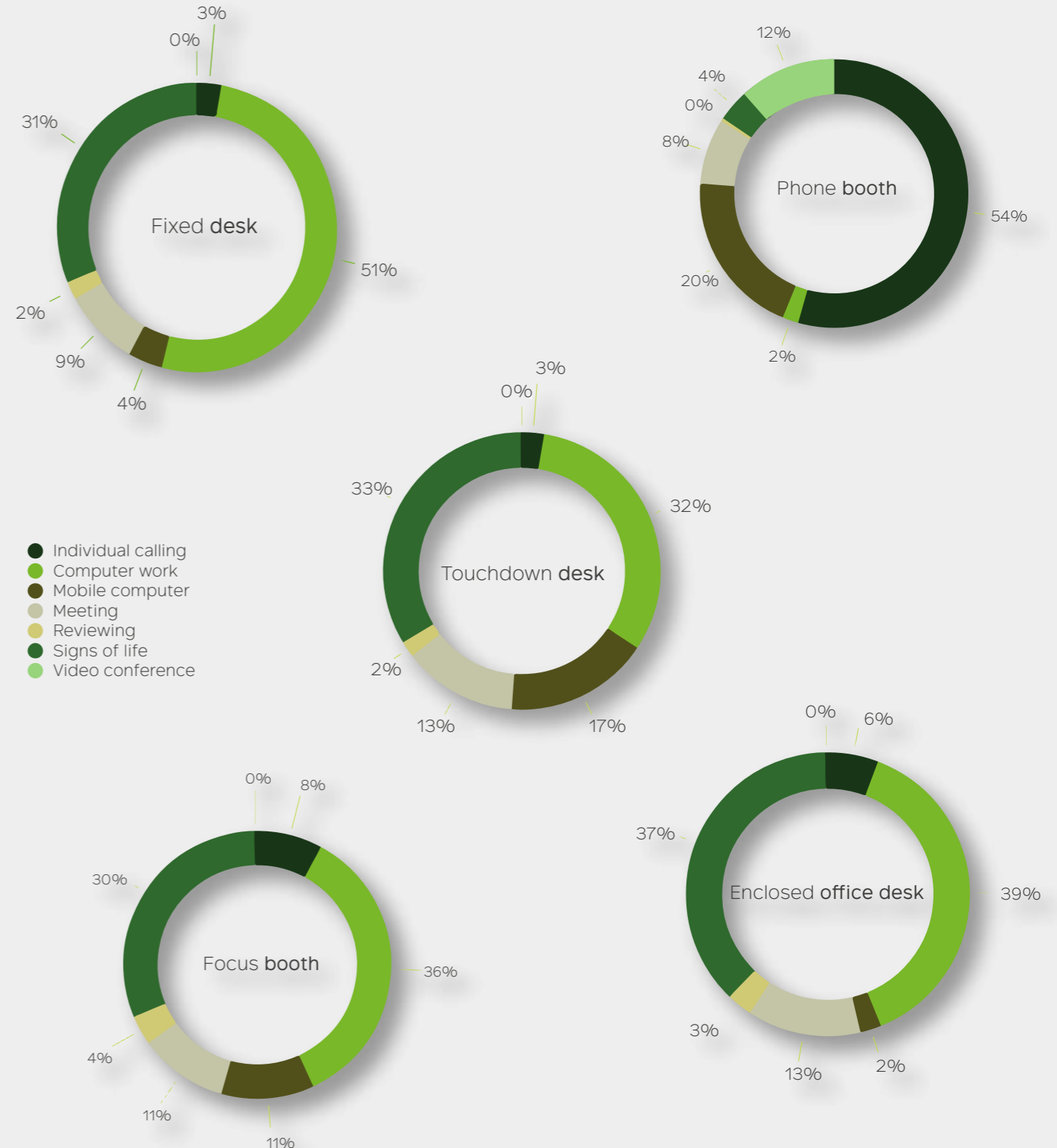
> **Average workstation occupancy is**
>
> # 48%

Activities

We measure occupancy and activities at workspaces. We differentiate between a variety of workplace types and the activities employees perform at them. Certain types of workspaces should provoke certain activities, but do they?

Fixed desk
3%
0%
31%
51%
2%
9%
4%

Phone booth
12%
4%
0%
8%
54%
20%
2%

Touchdown desk
3%
0%
33%
32%
2%
13%
17%

Focus booth
0%
8%
30%
36%
4%
11%
11%

Enclosed office desk
0%
6%
37%
39%
3%
13%
2%

- Individual calling
- Computer work
- Mobile computer
- Meeting
- Reviewing
- Signs of life
- Video conference

03
Meeting facilities

Next to working at their desk, many workers spent a considerable amount of their time in meetings. Almost every office has meeting facilities to have conversations. However, one may wonder if the presence of meeting facilities is proportionate to the amount of actual meetings.
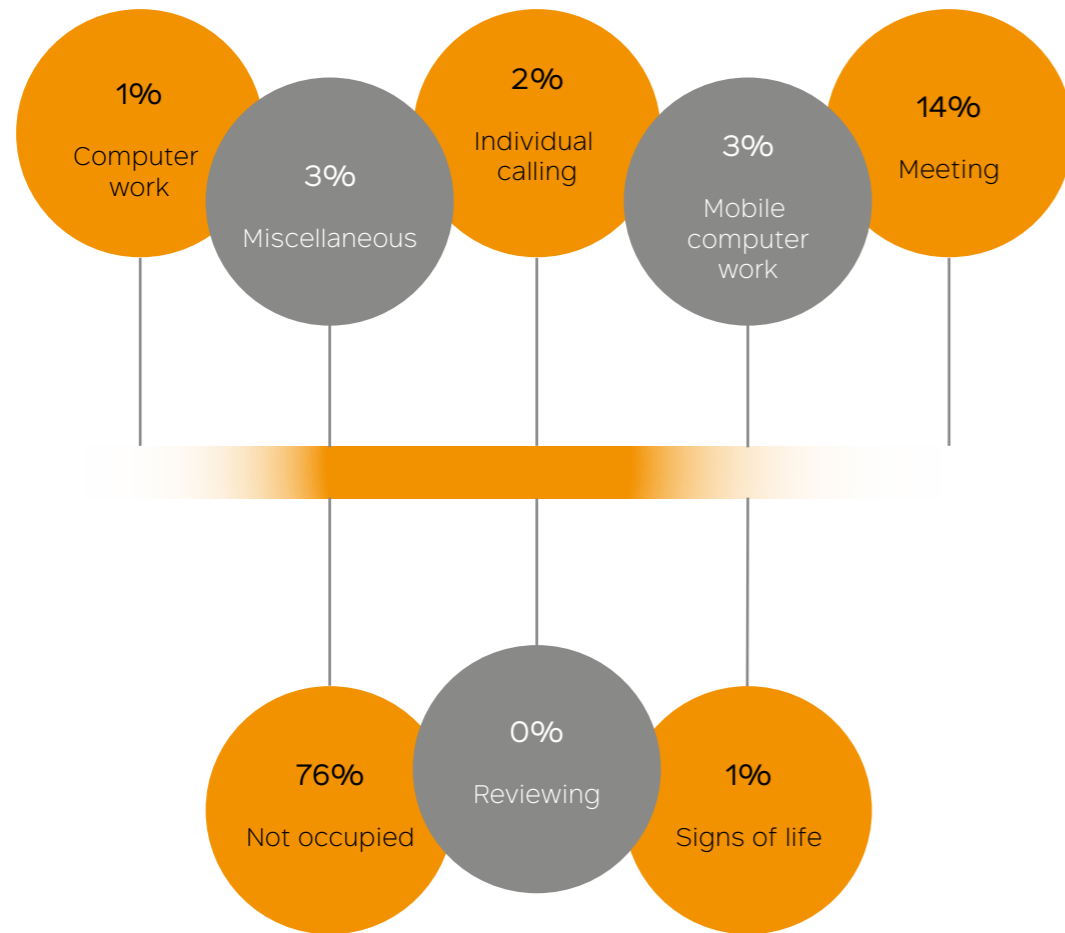
We can find the answer in the statistics of meeting facilities occupancy rates.

In this chapter, we will showcase insights in the occupancy of meeting facilities.

Key insights

- Occupancy of meeting facilities is generally low.

- Facilities are used for other activities than meetings.

- Conference rooms are the most popular meeting facility.

Activities in **meeting facilities**

1%
Computer work

3%
Miscellaneous

2%
Individual calling

3%
Mobile computer work

14%
Meeting

76%
Not occupied

0%
Reviewing

1%
Signs of life

Even though we have identified not less than 17 types of meeting facilities, a clear pattern can be identified in terms of popularity. There is a clear top three of commonly used meeting facilities. Across offices, conference rooms are the most common meeting facility, making up 36% of the total. This is followed by the meeting facilities in open space, with 29%. In the third place we have meeting rooms with 24%. Nevertheless, this does not create any implications about their occupancy.

When we take all types of meeting facilities in consideration, we see that their average occupancy is only 25%. It gets even more interesting when we dive deeper into the activities that employees perform in the meeting facilities. The data suggest that meeting facilities are only used for the intended purpose some 57% of the time. For an additional 12% it is being used for mobile computer work, while employees use it 7% of the time for individual telephone calls.

Average occupancy **meeting areas**

If we split the types of meeting facilities, we see significant differences in occupancy rates. Conference rooms have the highest occupancy rate with an average occupancy of 40%. On the other hand, at 12% meeting areas in open spaces tend to have a low occupancy.

40%
Conference rooms

12%
Meeting areas in open space

24%
Meeting rooms

04
Industries

> "
> At Measuremen, we measure in a variety of different industries.

The "typical" organisation does not exist. Organisations differ by country, by industry, by size etc. It is often believed that these differences have a direct influence on occupancy rates and activities performed. In this chapter, we split our dataset based on these differences and highlight some interesting findings.

Key insights

- Occupancy is highest in governmental organisations.

- Australia has the highest occupancy of all countries.

- Occupancy is lowest in large organisations.

Industries

In each industry we have mutiple clients who desire occupancy studies. Our data show that 61% of the organisations are active within the **corporate industry**. This makes the data from this sector most accurate, but considering the **297 projects** we performed in 2018, we also have a lot of valuable data from other industries.

Occupancy across **industries**

Education	31%
Government	48%
Healthcare	42%
Corporate	47%
Semi government	43%

Education
40

Corporate
181

Healthcare
20

Government
32

Semi government
24

297
projects

When it comes to workstation occupancy between different industries, we see a number of differences. Occupancy in the education sector is clearly the lowest, averaging 31%. This could possibly be the result of the logistics associated with having different classes per day. On the other hand, we see the highest occupancy at the governmental sector. Is this indicative of a lesser dynamic sector?

Activities per **industry**

To get useful insights in activities performed in varies industries, we clustered the industries into **corporate, education**, and, **governement**.

The signs of life in the corporate sector is higher (16%) compared to the education sector (11%). However, many desks in the education sector are not being occupied. This might imply that the education sector just has a better "clean desk policy", though this is difficult to confirm. Computer work is the most popular activity across all sectors, yet most pronounced in the corporate sector. Other activities occur less often, and the distribution is quite similar across sectors.

Corporate
16%
1%
23%
2%
2%
1%
4%
51%

Government
15%
1%
24%
1%
1%
2%
5%
51%

Education
11%
2%
16%
2%
1%
1%
4%
63%

- ● Computer work
- ● Mobile computer work
- ● Individual calling
- ● Miscellaneous
- ● Desk meeting
- ● Not occupied
- ● Reviewing
- ● Signs of life
- ● Video conference
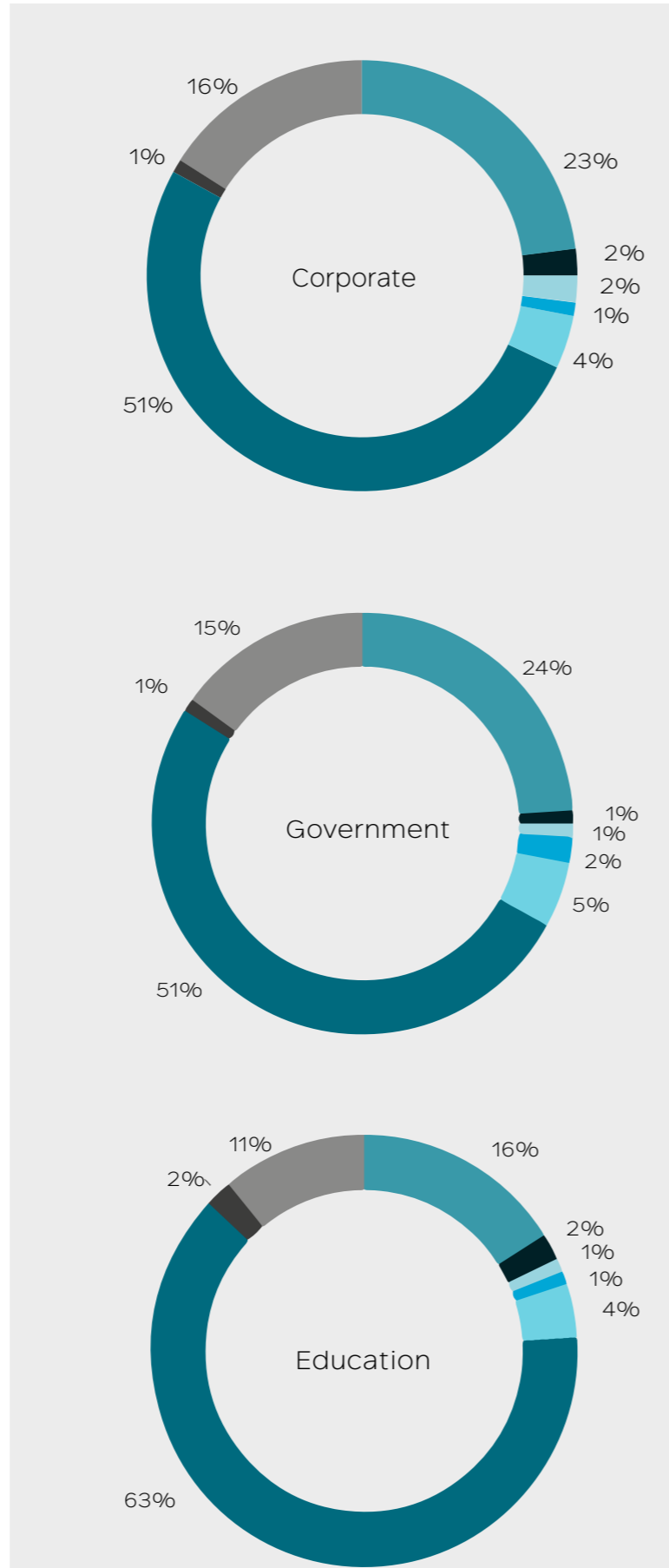
Organisation **sizes**

In order to investigate occupancy across the various organisation sizes, we split our workstation data into three groups. Small organisations have, on average, 133 workstations, while medium sized outfits average 429 workstations, and large organisations 647. With these groups, we calculated occupancy.

It turns our that the medium sized organisations are best performing in terms of occupancy and physical occupancy. The difference between occupancy and physical occupancy are the "signs of life".

We define signs of life as desks that are obviously being occupied, but where there is no physical presence at the time of measurement. Across all organisations, the "signs of life" frequency is relatively quite similar; about 14%.

This means that workers in small, medium, or large organisations don't really show different behaviour when it comes to leaving their desk occupied. However, it seems that desks at medium sized organisations show a higher workplace occupancy.
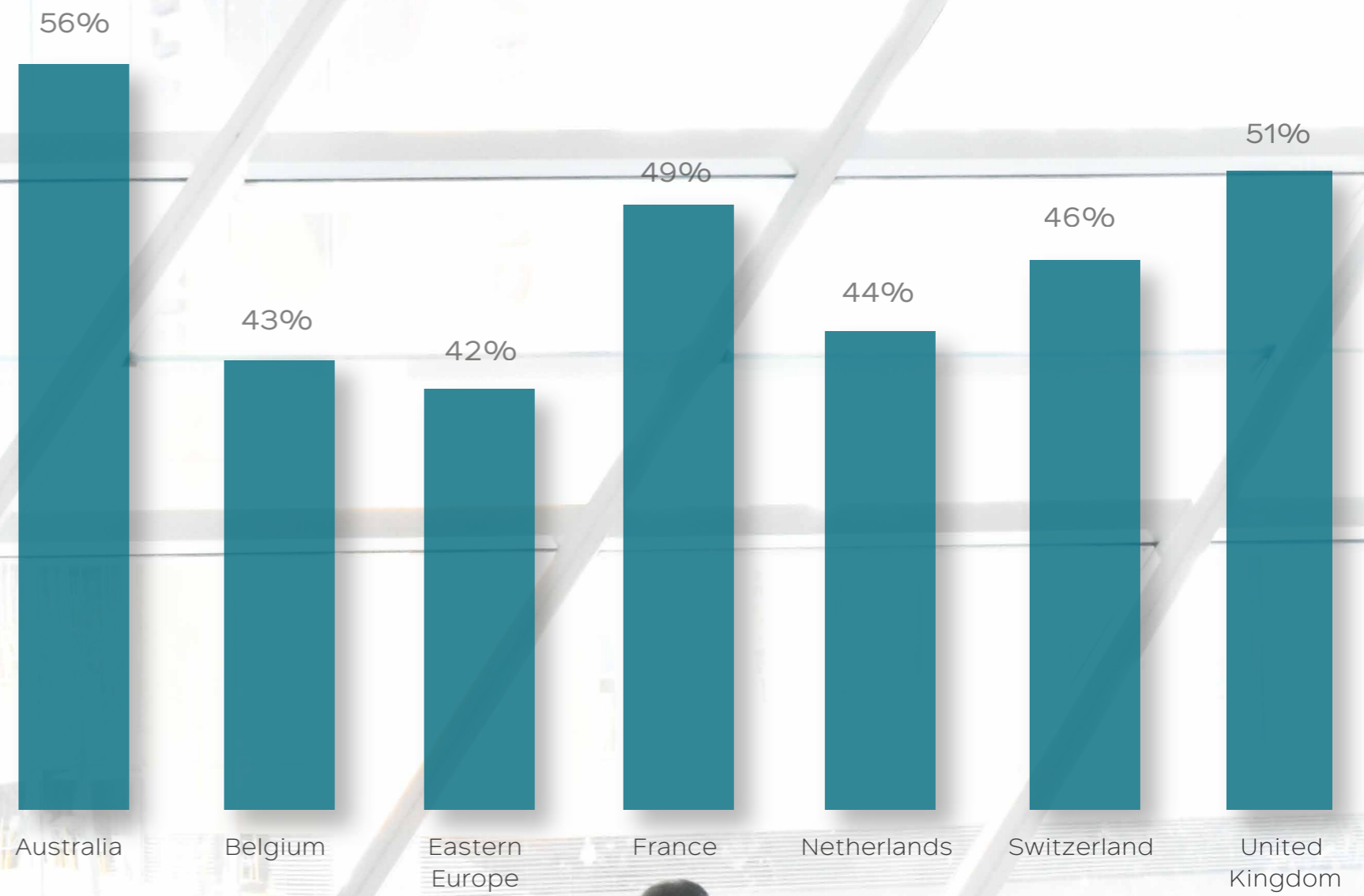
60%
45%
30%
15%
0%

Small   Medium   Large

- ■ Occupied
- ■ Physically occupied
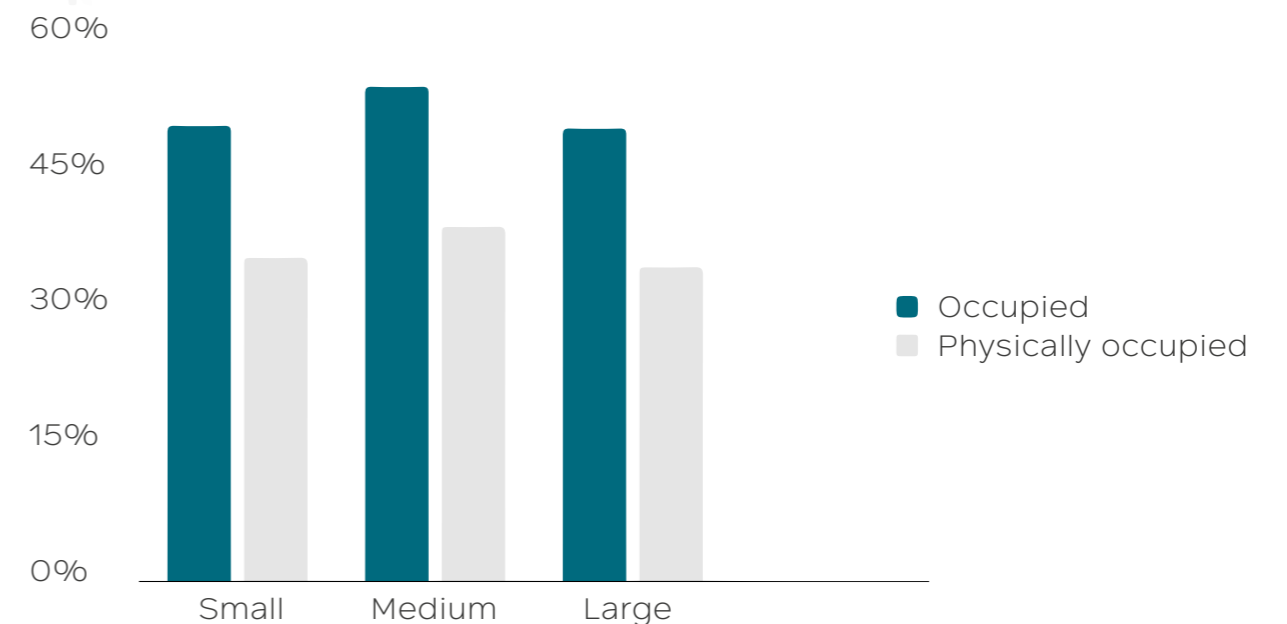
Countries

At 56%, workplace occupancy is highest in Australia, while at 42% it is lowest in Eastern Europe. Western Europe has occupancy between both extremes; ranging from 45 to 51%, with the United Kingdom leading the occupancy charts.
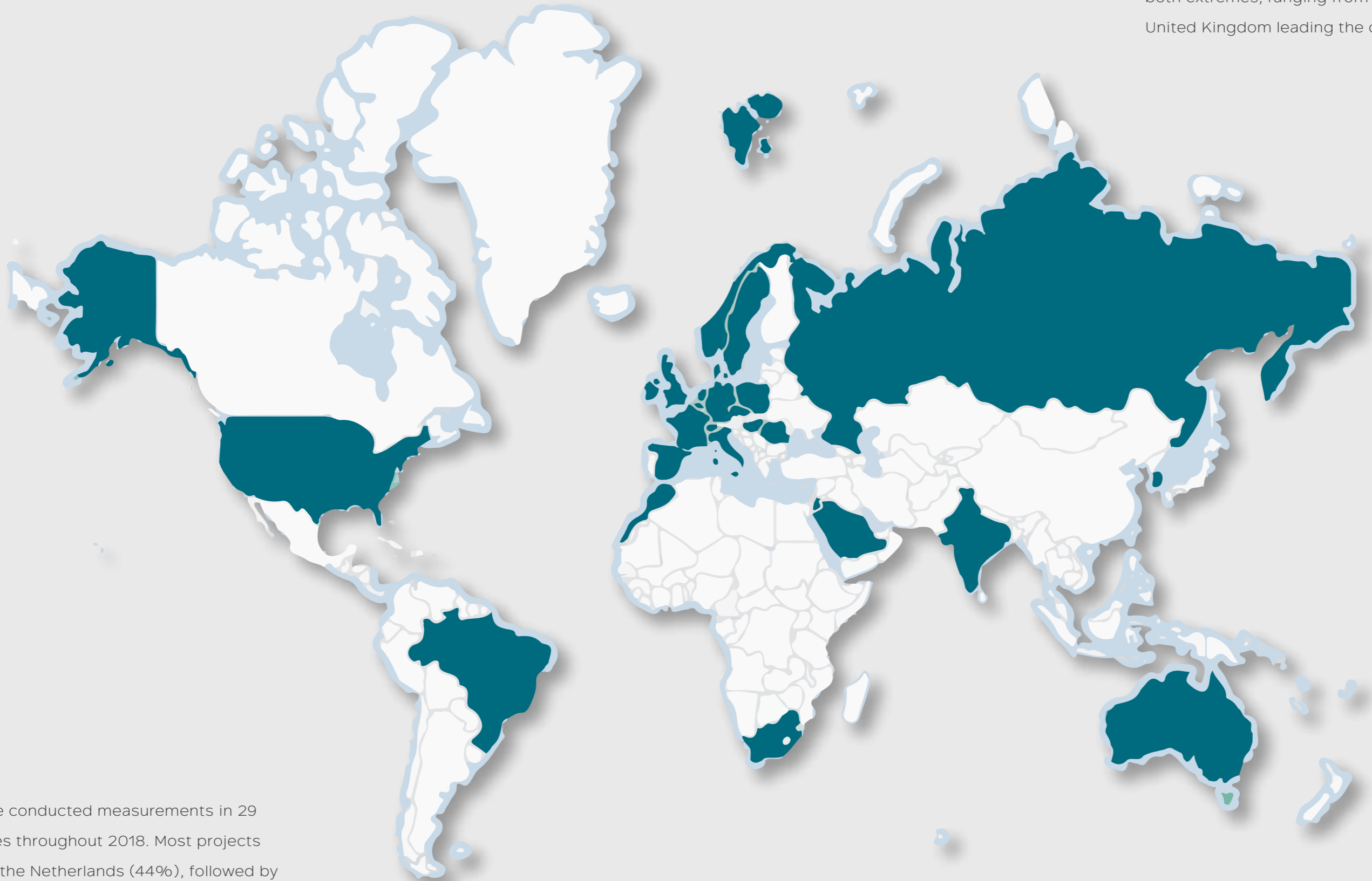
We have conducted measurements in 29 countries throughout 2018. Most projects were in the Netherlands (44%), followed by France (22%), the United Kingdom with 14%, and Australia with 8%.

Occupancy across countries

56%

51%

49%

46%

44%

43%

42%

Australia | Belgium | Eastern Europe | France | Netherlands | Switzerland | United Kingdom

05

Conclusions

Key insights

– An overview on workplace occupancy.

– 50% occupancy is most prevalent.

– We expect many changes in the future.

Conclusion

The Annual Workplace Report 2018 gives us a broad and intricate perspective into workplace habits around the globe. We see differences in occupancy and activities, across sizes of organisations, industries, time, meeting areas, and even types of desks. Looking at workplace habits from so many perspectives offers a challenge to make general conclusions. By aligning all perspectives and creating an overview of our data we see one statistic that keeps popping up in each graph; the 48% occupancy rate of workspaces. No matter how we categorise our data, occupancy seems to stick at around 50%, meaning that, on average, we have about two desks available for each employee.

That one in two desks is usually empty, might be perceived as a waste of space. However, we've learned that employees perceive workspaces to be busier than they actually are. So you could wonder whether reducing the office space drastically in size is an effective solution. Do these scores require a solution at all? The question is what the future will bring when it comes to occupancy. There is a trend towards Flex-working, Activity Based Working, and working externally in various ways. One thing that seems inevitable is the rise of more digital nomads. Over the past years, we haven't seen large shifts in occupancy nor activities at desks in our dataset. This could mean that facility managers effectively compensate for the dynamic workforce, or that the large waves of change hasn't really started yet. The typical "9-5" patterns are still quite visible and about 90% of the desks in offices are still fixed desks, as shown in our dataset.

Nevertheless, we believe that the large waves of change in workplace behaviour and occupancy will start flowing, and we are here to flow along with the change. We recently made small improvements with the way we measure the flow along with the trends in an uncertain future, and guarantee our clients accurate and insightful feedback. We are looking forward to the future and the ongoing evolution of the workplace!

Ian Foulds

- CCO

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