



ANNUAL
WORKPLACE
REPORT
2019

MEASUREMENTS

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A warm welcome

The 5th edition of our Annual Workplace Report is here! Each year we share our findings so these insights can help you make better decisions on improving your workplace. This year alone, we added over 200,000 workstations to our extensive database, closing in on almost 900,000 workstations measured.

The way we measure has changed over the last few years. From observations and sensors to smartphone apps like Habital® and workplace surveys. One thing remains: we accurately collect data over a very broad group of organisations representing the complete world of office work.

There is a big difference between actual occupancy rate and the way occupancy is experienced and perceived by office occupants. Comparing these two are essential in supporting a human-centered vision on improving workplaces.

More and more professionals question the effectiveness of an open plan office. But we still see an increase of flexible desks in open areas. This trend seems to be like a slowly steering seaship, but a turnaround is to be expected in the coming years. And where the average global occupancy rate was decreasing the last three years, we do see a slight increase in 2019.

Workplaces impact people and the way people work. But it also has an impact on their personal lives. Looking back at the past five years, we can conclude that it's not just about occupancy and utilisation, but it's more about the activities and preferences. And for the upcoming years we can even determine personal experiences and personality characteristics need to be taken into account for continuous improvement of the work environment and to learn about the most valuable asset in the center: you!

Vincent le Noble
- Founder and CEO



01

Overview

Company milestones

2005	Founded	Measuremen was founded in The Hague, The Netherlands in 2005.
2013	Brussels office	Measuremen opened its first international office in the spring of 2013.
2015	London office	Measuremen opened its first office in London at the end of 2015.
2017	Sydney office	Measuremen crossed continents and settled in Sydney, Australia.
2018	29 countries	Measuremen has clients in 29 countries around the globe in 2018.
2019	22,772 desks	Measuremen measured 22,727 desks on one single day.

Statistics

The statistics below represent the total numbers of 2019. We can proudly say that we reached a new milestone: we measured 22,772 desks on a single day. The total number of seats have been doubled compared to 2018. This is a record in the history of Measuremen. Over the past 15 years, we measured the occupancy rates of 43 different countries in total. In 2019, we measured in 30 different countries, which is an increase of one country compared to 2018. Not to forget, this number includes six new countries.

In this Annual Workplace Report we will tease out the details to give simple but insightful aggregated data of our full benchmark. However, one shouldn't ignore the complexity and unique circumstances of each individual organisation. Every individual organisation deviates from the averages as each organisation has its own unique combination of workplace strategy, industry, country, and company size.

In 2019 we measured

203,735
workstations

448,616
seats

246
different studies

and we were active in

30
different countries



Glossary

Activities

Computer work	Individual, immobile based work.
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, provided with power sockets.
Focus desk	Cubicle / workstation with a desk screen.
Specialised desk	Project/lab desk, connected to specialised equipment.
Focus booth	Small enclosed area for individual concentration work.
Phone booth	Small enclosed booth used for individual calling.

Meeting facilities

Conference room	Large meeting room, often provided with whiteboards.
Meeting area in open space	Meeting area for having meetings located in open area.
Meeting room	Room with a meeting table.
Consulting table	Meeting table, used for meetings or work.

Organisation sizes

Every single year we measure across a range of different organisations. In 2019, we measured organisations of all sizes. From a small organisation with only 37 workstations to an organisation with 13,313 workstations and everything in between. The groups below visualise our 2019 clients, clustered by number of workstations. The data shows that about half of our projects were conducted at organisations with 0-500 workstations. By filtering on organisation size, we gain more detailed insights in their behaviour. Perhaps they behave quite differently? We will investigate this in the following chapters.



Figure 1. Organisation sizes

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Key to Measuremen's success is their unique ability to understand the workplace environment.

- JLL, Australia

02

Workstations

Key insights

- Average workstation occupancy rate is 50.4%
- The highest occupancy is on Tuesdays
- The majority of desks in offices are fixed desks

“

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

Almost one third of your life is spend in and around the office. Where most of the time is spend behind a desk. Every employee has a preference regarding the type of desk. Some desks facilitate their productivity more than others.

Next to desk types, we also capture a variety of activities that are carried out at these desks. With doing so, we enable you to see the real usage and needs per desk type.

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

Occupancy of workstations

Data aren't just a couple of numbers, they tell a story. In my experience, I noticed that clients have the need for real time data and insights. They want to compare themselves with others in their industry.

The data of 2019 shows that the average occupancy rate of a workstation is 50.4%. Before we conduct an occupancy study clients tend to expect higher occupancy rates. Mind you, the 50.4% occupancy here includes desks that are in use but where no one is present. If we remove the "signs of life" activity from the total occupancy rate, the "active occupancy or physical occupancy" shows a rate of just 34.9%.

When it comes to insights in physical occupancy or active occupancy, it's easier than ever before. With the arrival of stable and affordable desk sensors, you can have an update on this type of occupancy every six minutes. That allows you to have a higher granular insight in the usage of your desks, which might be the next step to improve the performance of your workstations from an occupancy perspective.

We notice that there is an apparent gap between people's perceptions and reality. We often perceive a workplace to be "quite busy" when two out of three workstations in an office is occupied. Hence, we tend to look for a "quieter" workplace. Moreover, employees tend to stick to their "own area", resulting in inefficient usage of the workplace.

Larger organisations usually have a lower occupancy. I was involved in an occupancy study at an organisation in Amsterdam. Its building had around 2,100 workstations. The results of our study showed precisely that, at peak occupancy, less than 1,000 workstations were being occupied. This indicates that the creation of a workplace based on perceptions of the number of employees can differ from the real occupied use. Whether it leads to happier employees or cost savings, the outcomes of our occupancy studies are always an eye opener to our clients!



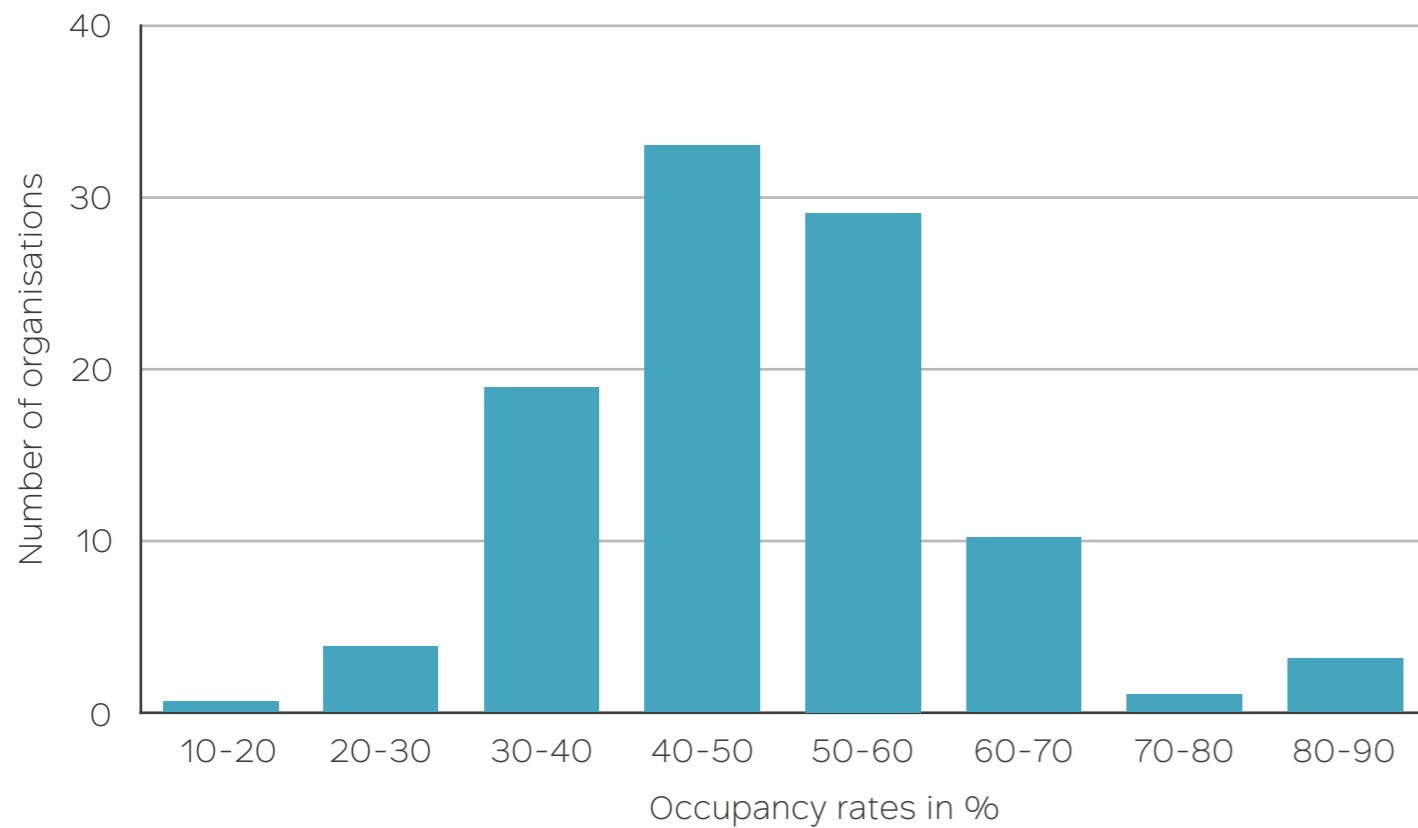
Mariska van Nieuwkoop
- Project Management Director

The average occupancy
of a workstation in
2019 is

50.4%

The deviations from the average

Although the average global occupancy 50.4% is, there is still much more in it. If you look at the graph below, you can see that the organisations are grouped based on occupancy percentiles. We see that the majority (33%) of the organisations have an occupancy rate between 40-50%, followed by an occupancy rate of 50-60% (29%). But if you look at the very ends of the distribution, there is 1% of all organisations which have an occupancy rate between 10-20% and on the other side, 3% of all organisations have an occupancy rate between 80-90%. Although these outliers seem to be extreme, the distribution resembles the shape of a normal distribution (a bell curve) which is often seen in natural phenomena, making our data appear to be a reliable representation. In the following chapters we will discover the causing factors for the outliers within our sample.



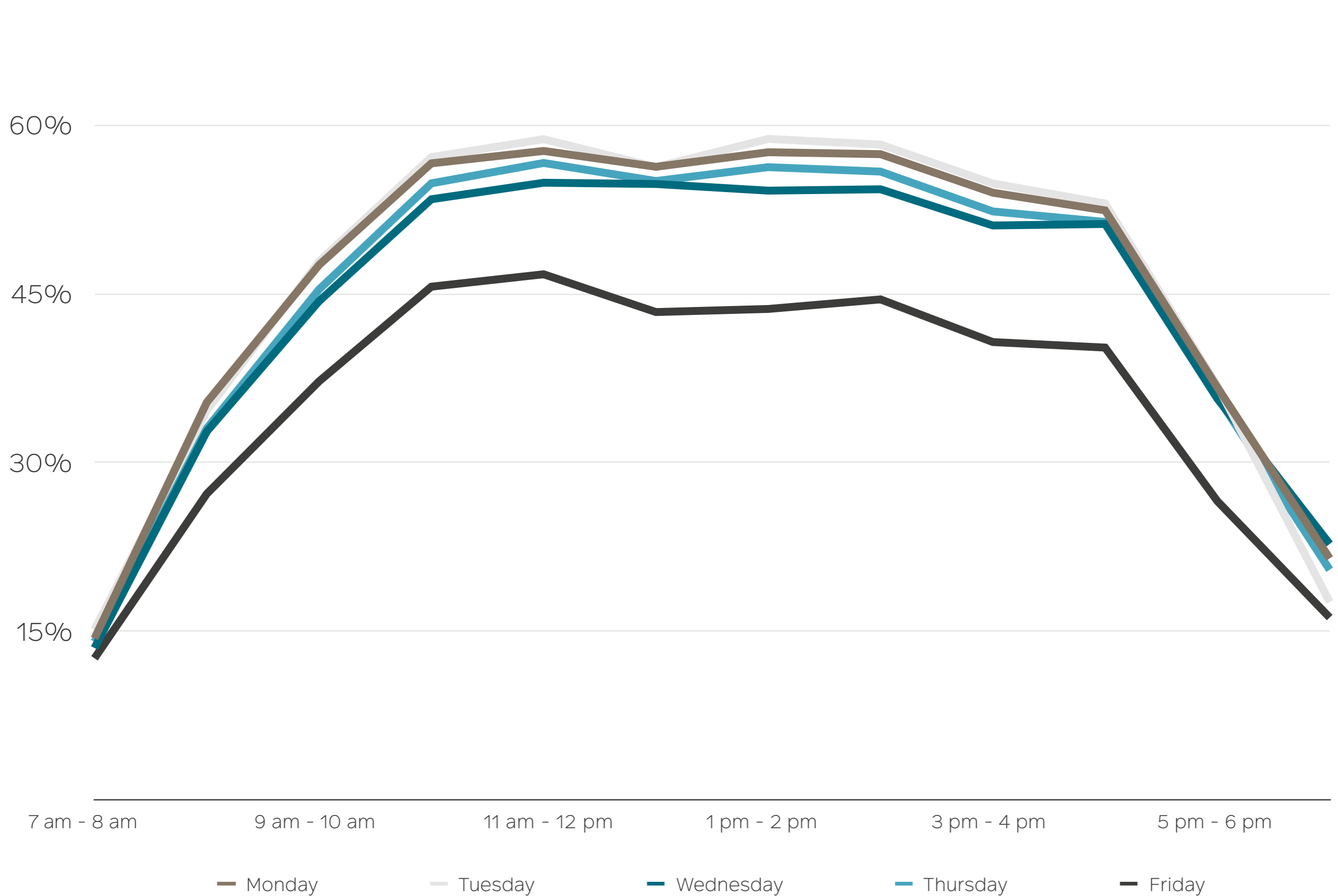
Graph 1. Deviations from the average



*Facts often differ from perceptions!
Measuremen separates facts from fiction.*

- KLM, The Netherlands

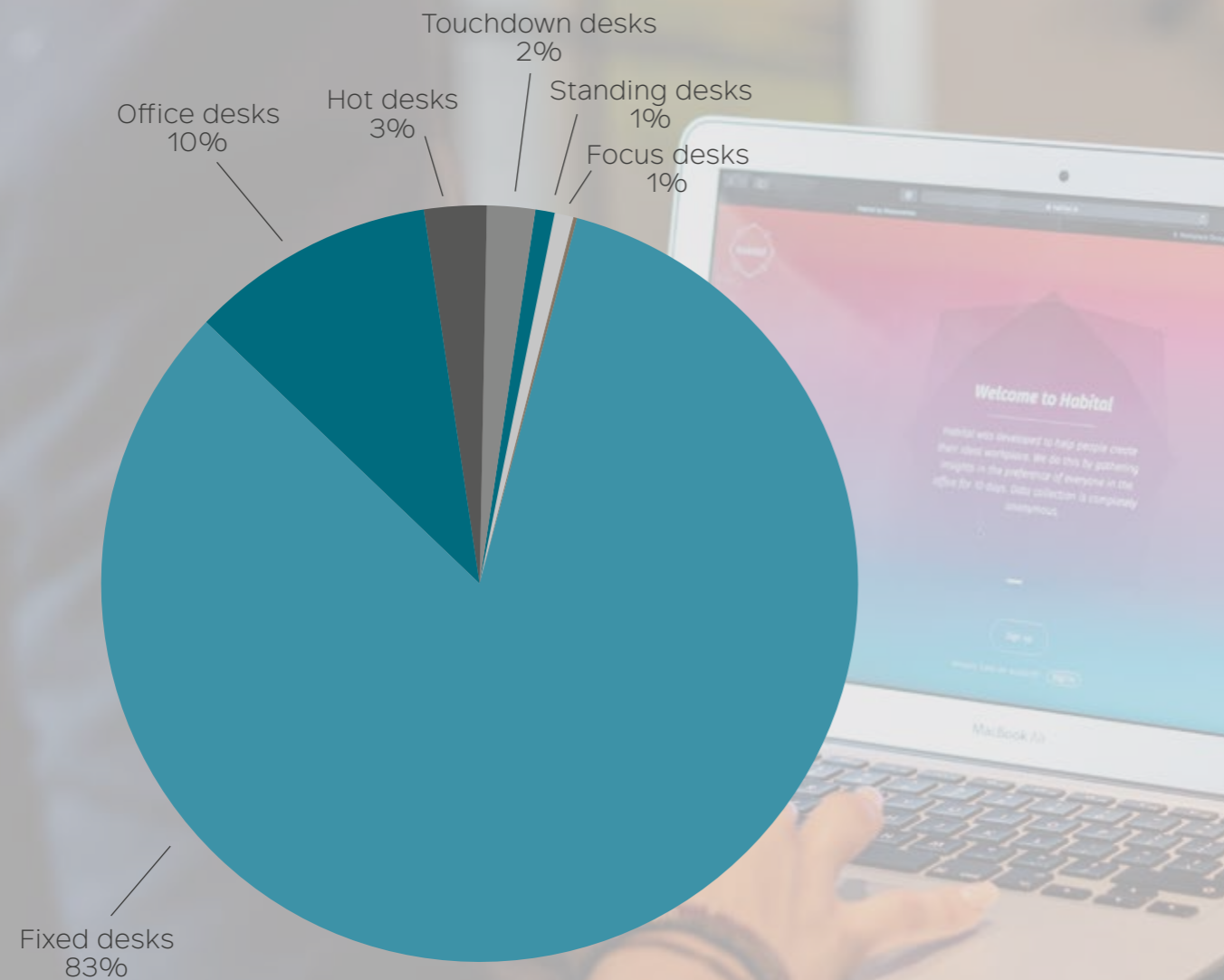
Occupancy rate of workstations during the week



Graph 2. Occupancy rates during the week

Types of desks

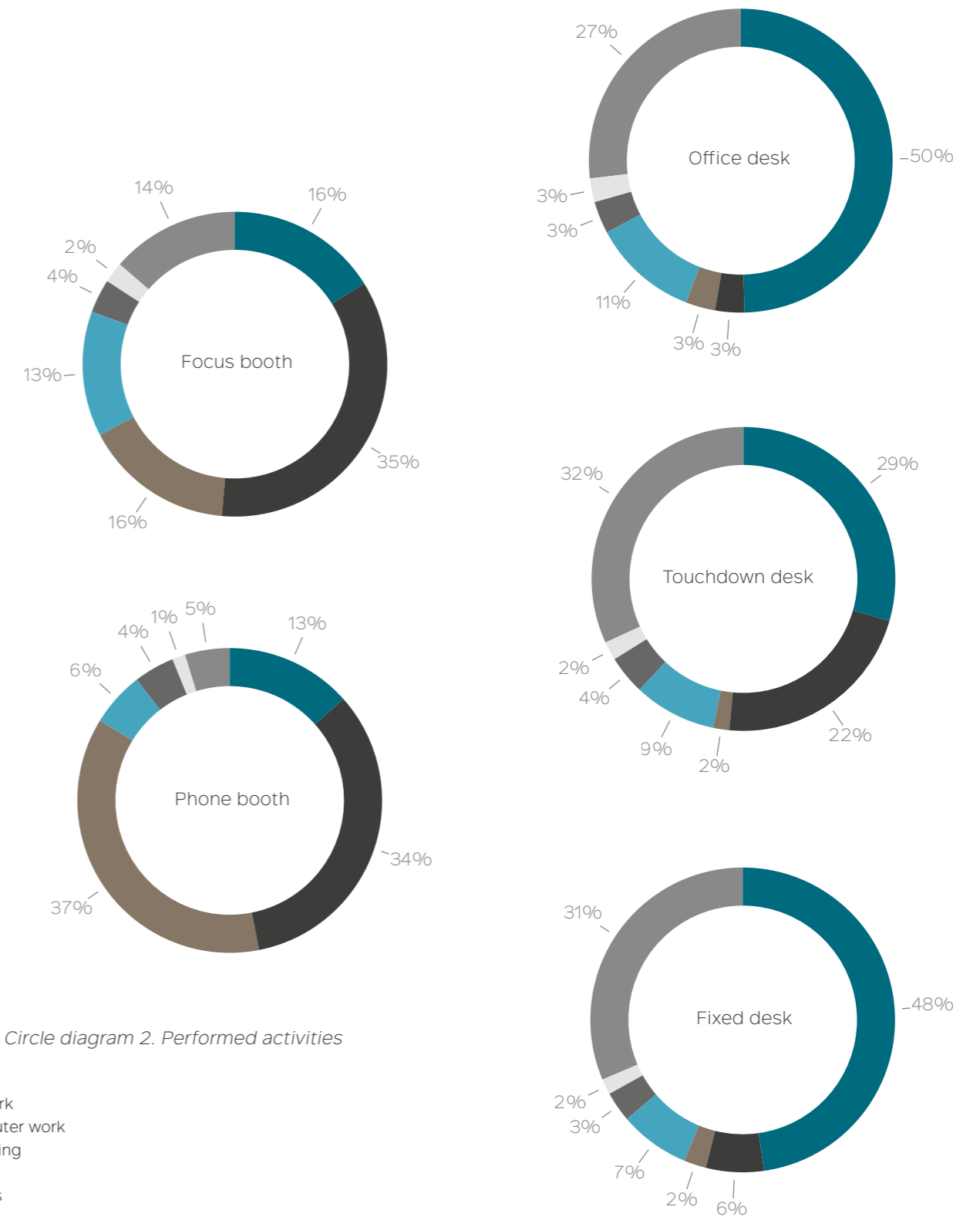
The circle diagram below presents the distribution of desk types across offices. The collected data shows that offices are predominantly filled with allocated fixed desks by 83%. A decrease of 7% compared to last year. This significant drop seems to be a result of the preference for flexible desks. Furthermore, the gathered data indicates that there is only a small percentage of desks available for dedicated activities such as focused or specialised activities.



Circle diagram 1. Occupancy rates of desks

Activities

Next to the type of desk, we also measure activities at workstations. Different types of desks should provoke different types of activities. For example, a phone booth should facilitate individual calling. The graphs below show which workstations are used for which activities. Is this proper use of these facilities? The advantage of measuring via observation studies, are the detailed insights of the activities carried out. The circle charts below, show each type of workstation together with the corresponding activities.



Circle diagram 2. Performed activities

- Computer work
- Mobile computer work
- Individual calling
- Meetings
- Miscellaneous
- Reviewing
- Signs of life

03

Meeting facilities

Key insights

- Occupancy of meeting facilities is generally low
- Besides meetings, facilities are also used for mobile computer work
- The most commonly used meeting facilities don't show the highest occupancy rates

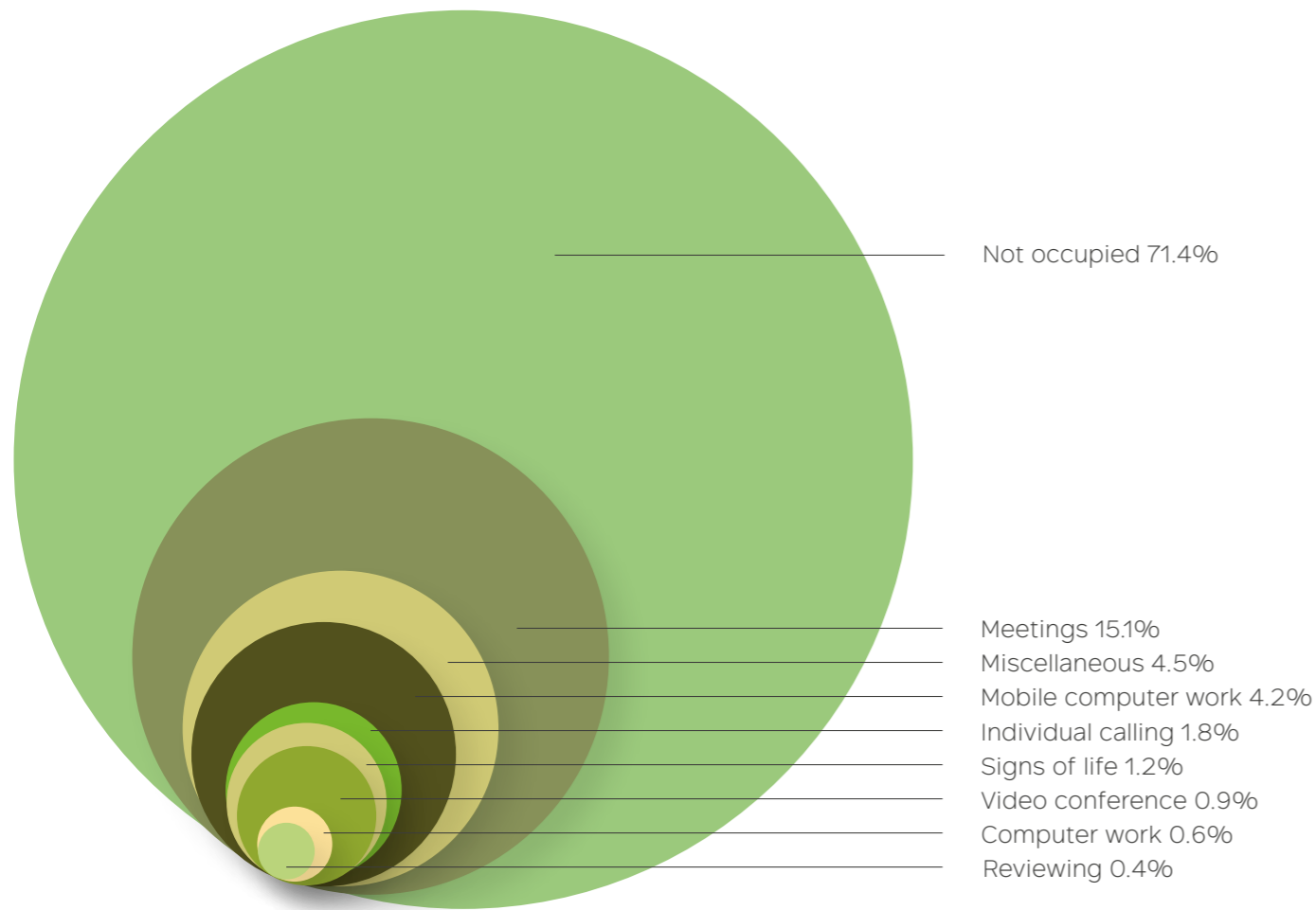
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Data tells the story that **no one** knew.

Besides the single desks in an office, the workplace also exists of meeting facilities. Employees tend to spend a considerable amount of time in meetings. Nowadays, most of the offices have different meeting facilities for meetings and conversations.

In this chapter, we dive deeper into the real usage, utilisation and occupancy of the different type of meeting facilities.

Meeting facilities



Circle diagram 3. Meeting facilities

Meeting facilities are a large part of each office building. Usually, there are more seats in meeting facilities than there are workstations in the building! As shown in the graph, the most commonly registered activity in meeting facilities are meetings. But we know that meeting facilities are also used as an overflow or escape space for individual calling and mobile computer work. The reason might be that employees can't find a proper and/or available spot for these activities in the other working areas of the office.

However, meeting facilities are quite often unused during the day, 71.4% of the time! By looking at the occupancy scores of meeting facilities across the day, we can explain this. Namely, we see peaks in occupancy rates between 11 am - 12 pm and 3 pm - 4 pm, but very low occupancy rates between 12 pm - 2 pm, before 10 am and after 4 pm.

“

Measuremen is able to cater to our measuring and customisation needs from their standard reporting, thereby giving us a more meaningful study analysis in our workplace utilisations.

- Sodexo, Singapore



Average occupancy in meeting facilities

42.7%

Meeting rooms

36.5%

Conference rooms

18.1%

Meeting area in open space

14.0%

Consulting tables

Occupancy rates can differ significantly between types of meeting facility. At Measurement, we differentiate 17 types of meeting facilities, but in general, we see that meeting rooms, break-out areas, and consulting tables are the most commonly used types. Nevertheless, the occupancy rate of break-out areas and consulting tables are quite low. Conference rooms, for example, are much better occupied (36.5%) but they are not that common. Might breakout areas and consulting tables just function as impractical eye candy for filling the space?

Better is good

Many companies experiment with different workplace configurations, and spend a lot of time and money to build 'the office of the future'. But most are based on theories and strategies that might have had some success at other companies, not on their own empirical evidence.



To be honest I don't believe that 'the office of the future' is a very good ambition to strive for. But this is probably because when I grew up, the year 2020 definitely was the future. And today we're in 2020, and do I feel like I am living in the future? No, not really. But, have workplaces become better? It might depend on who you're asking. I definitely see that workplaces have become better in general. There still are some very bad offices and layouts that simply made people feel very bad in, and due to, the workplace. But there are far more improved workplaces now than offices that stayed the same and haven't got any better.

But how to get there, and what actually is an 'improved workplace'? Because isn't this what we are all after when we start up our workplace initiatives; to take the current situation and turn it into a better situation? Because better is good. Better offices are built and designed to fit like a tailor-made suit for the company and all of the individuals that make up that company. It understands what type of people are using it and for what purpose they are using it. A lot of time and energy is going into understanding how the workplace is used and experienced, in order to make adjustments that lead to an improved workplace, a better workplace. Because better is good.

Better for someone could be reduced real estate costs. For others better could be, attracting the best people easier and retain them longer. And then for others better could be to enable people to do their work more effectively.

Every reason to find ways to improve your workplace, how big or small the improvement, is a good reason. Because better is good. And the situation just got better for at least someone. It is, however, great to notice that workplace strategy teams are defining their ambitions broader and aiming to gain for everyone instead of just the Real Estate team or the HR team for example.

I have definitely noticed a focus more towards understanding what makes teams perform at their best and what it is that they need from the workplace to support them. Understanding the behaviour of their occupants and the way they interact with the workplace. Finding the sweet spot in which workplace efficiency meets workplace effectiveness and occupants well-being is the common denominator in Workplace Strategy programs I see being developed. These programs, now more than ever, hold a very 'human-centered' approach.

I feel fortunate that I can contribute to better performing workplaces and enable our customers to develop and manage these 'human-centered' workplaces and workplace strategy programs.

With a **unique combination** of data collection methodologies, we are able to provide a **unique combination** of insights to enable our customers to make evidence based decisions on ways to make better workplaces. Today, tomorrow and in the future.



Lyjo Franse
- Chief Operating Officer

04

Categories

Key insights

- Occupancy is highest in the financial sector
- Between industries, there isn't a common strategy in office types
- Occupancy is highest in Italy

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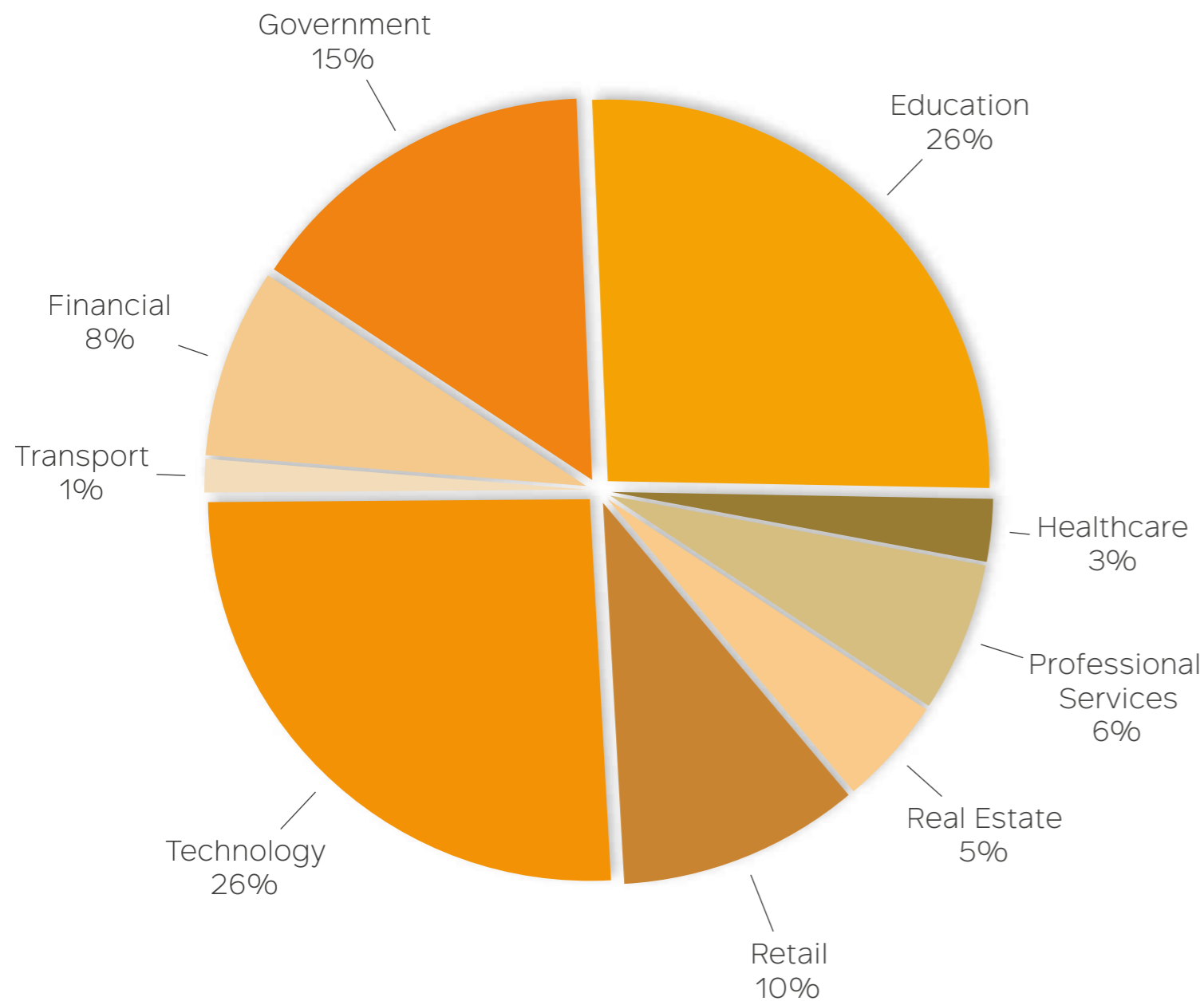
The **typical** organisation does not **exist**.

Every organisation has its own workplace strategy. These strategies might differ because of the different countries, industries, sizes or the culture. It is often believed that these variables have a direct influence on the occupancy rates and the performed activities.

In this chapter, we divide our dataset based on these variables and highlight the interesting findings.

Industries

Occupancy measures are relevant across all industries. From governmental organisations to retail, to technological companies, we measure it all. In total, we executed 246 projects which have their own specific requirements. In the technology, education, and government industry we see the highest demand for our projects, but we have measured across all industries this year. Because professional services and real estate are often indirect clients, we will exclude them for the rest of the chapters.



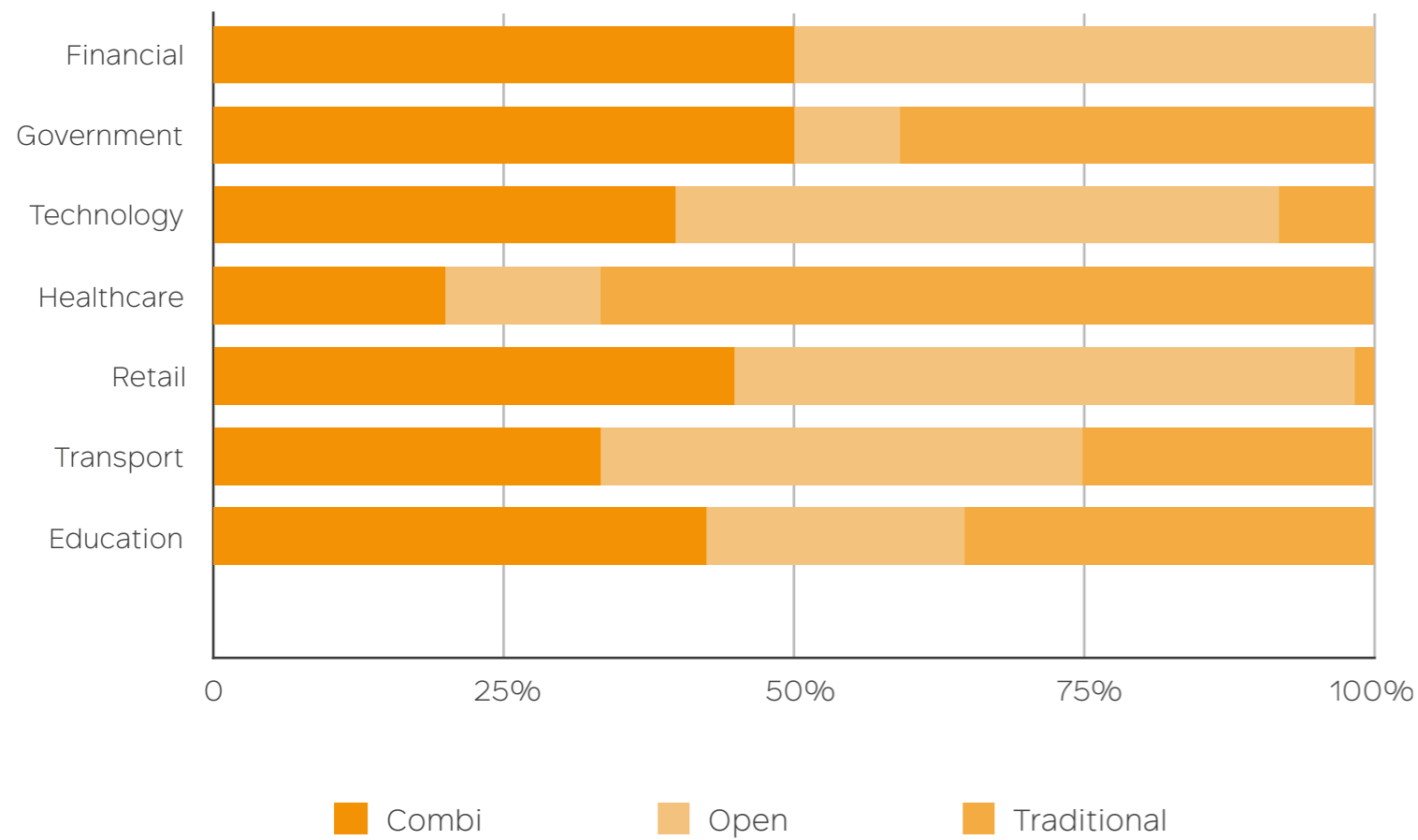
Circle diagram 4. Occupancy of industries

Occupancy across industries

There are significant differences across industries. The occupancy rate within the financial sector peaks with an average of 59.1%. While on the other side of the spectrum, the desks at educational organisations are only occupied for almost 34.8% of the time. The wide differences between these industries might be related to the nature of their work. One could imagine that teachers from the educational sector, leave their desks relatively often to give classes resulting in low occupancy rates for example. But does this imply that they should switch to flex working?

Financial	59.1%
Government	47.7 %
Technology	47.5 %
Healthcare	45.9 %
Retail	43.9 %
Transport	43.1 %
Education	34.8 %

Office type

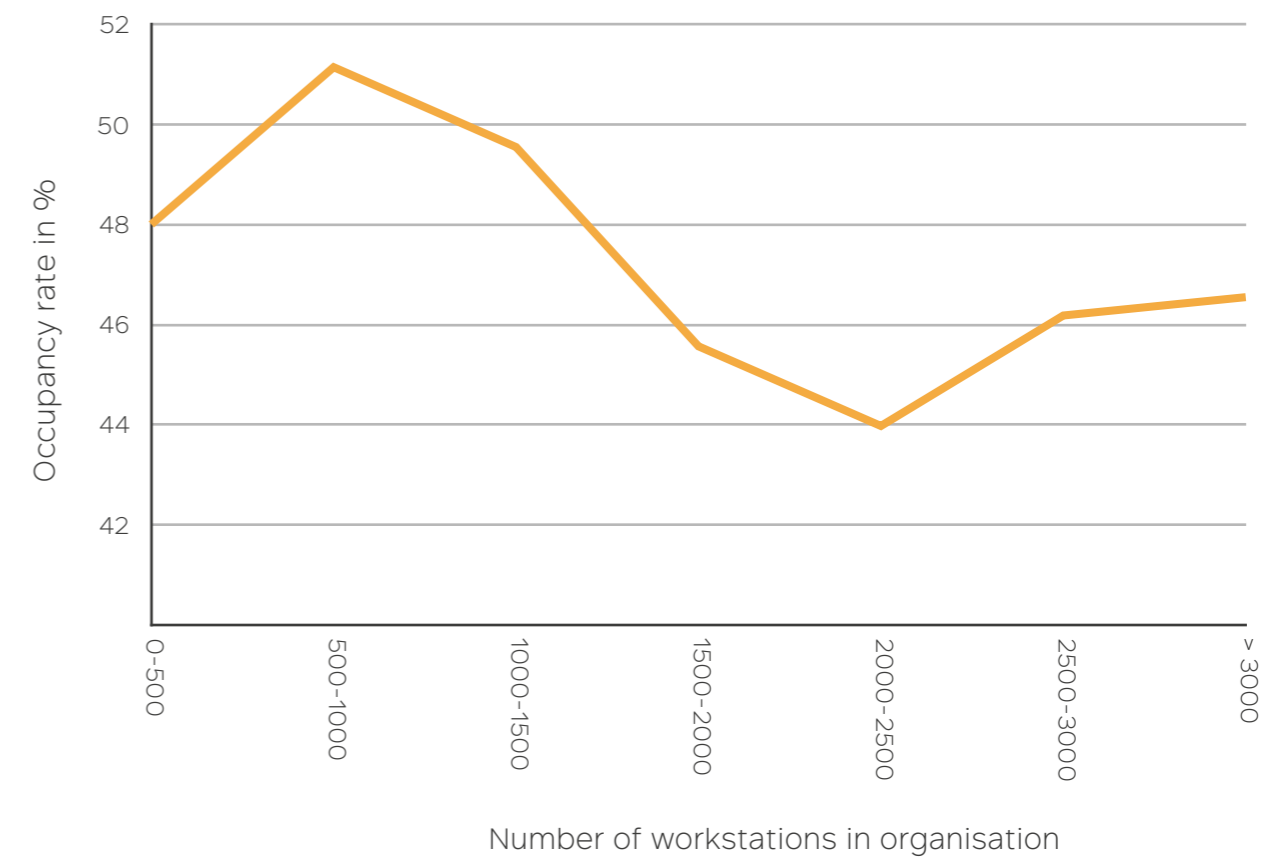


Graph 3. Occupancy rates of industries

Across the industries we see different office types being deployed. Traditional, closed offices are still quite popular within the healthcare industry. While offices of the financial, retail, and technology industries are more often deployed as combi- and open offices. In the other industries, like the transport, education, and government industry, the office types are still fairly mixed. Overall, the data shows that, organisations don't agree on the "best" office type, it largely depends on the nature of the organisation which office type fits best.

Occupancy across organisation size

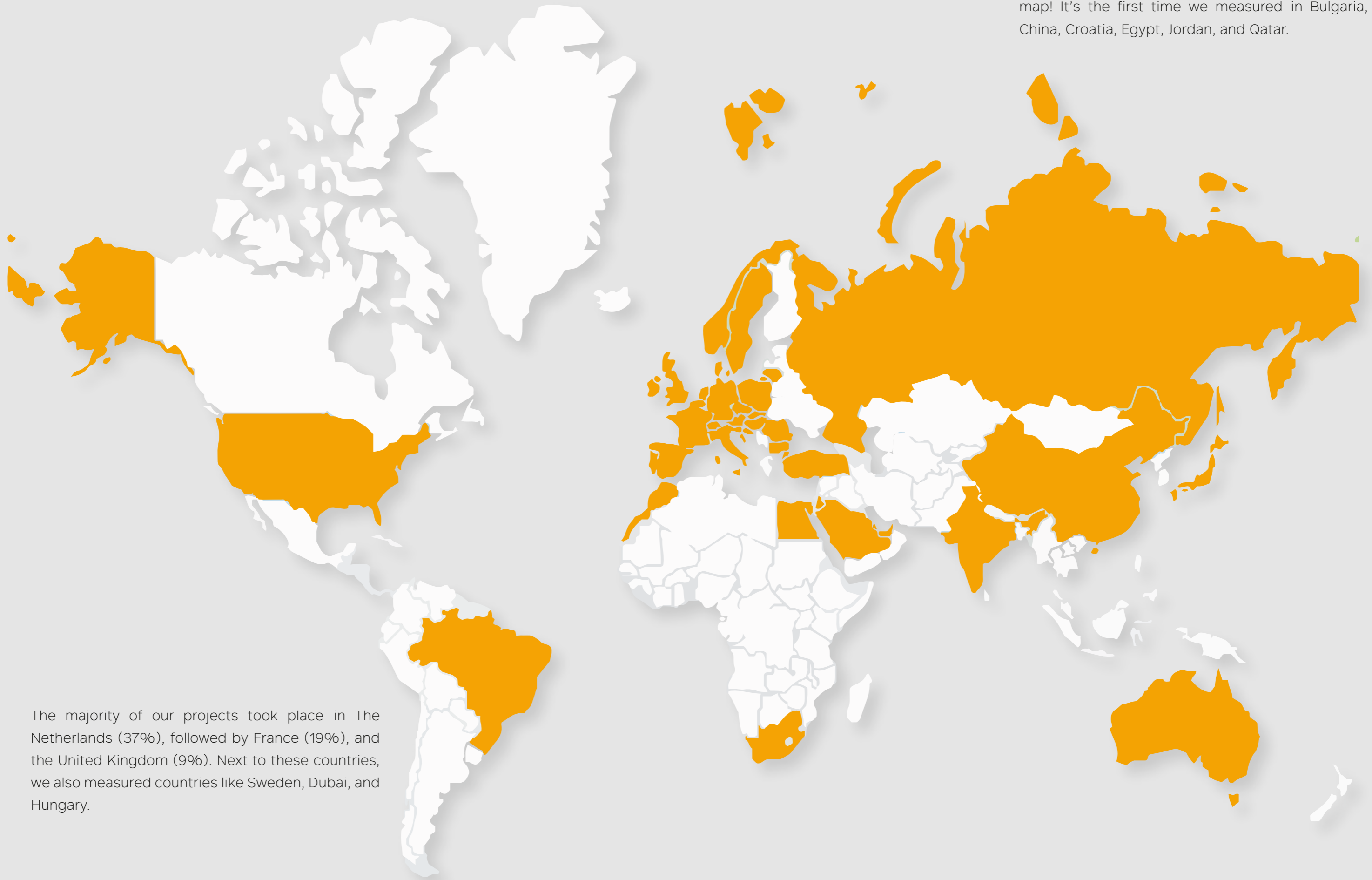
In order to investigate occupancy across organisation sizes, we've compared occupancy rates with the number of workstations per organisation. In the smaller organisations, with less workstations, we see higher occupancy rates. In general, the larger the organisation, the lower the average occupancy rate becomes. But what's interesting, is the fact that the variation in the small organisations is also higher (not shown in the graph). In small organisations, we see more often very high occupancy rates, but also very low occupancy rates. The larger the organisation, the less often we see these extremes. It seems that larger organisations usually don't let it get that "far".



Graph 4. Occupancy rates across organisation size

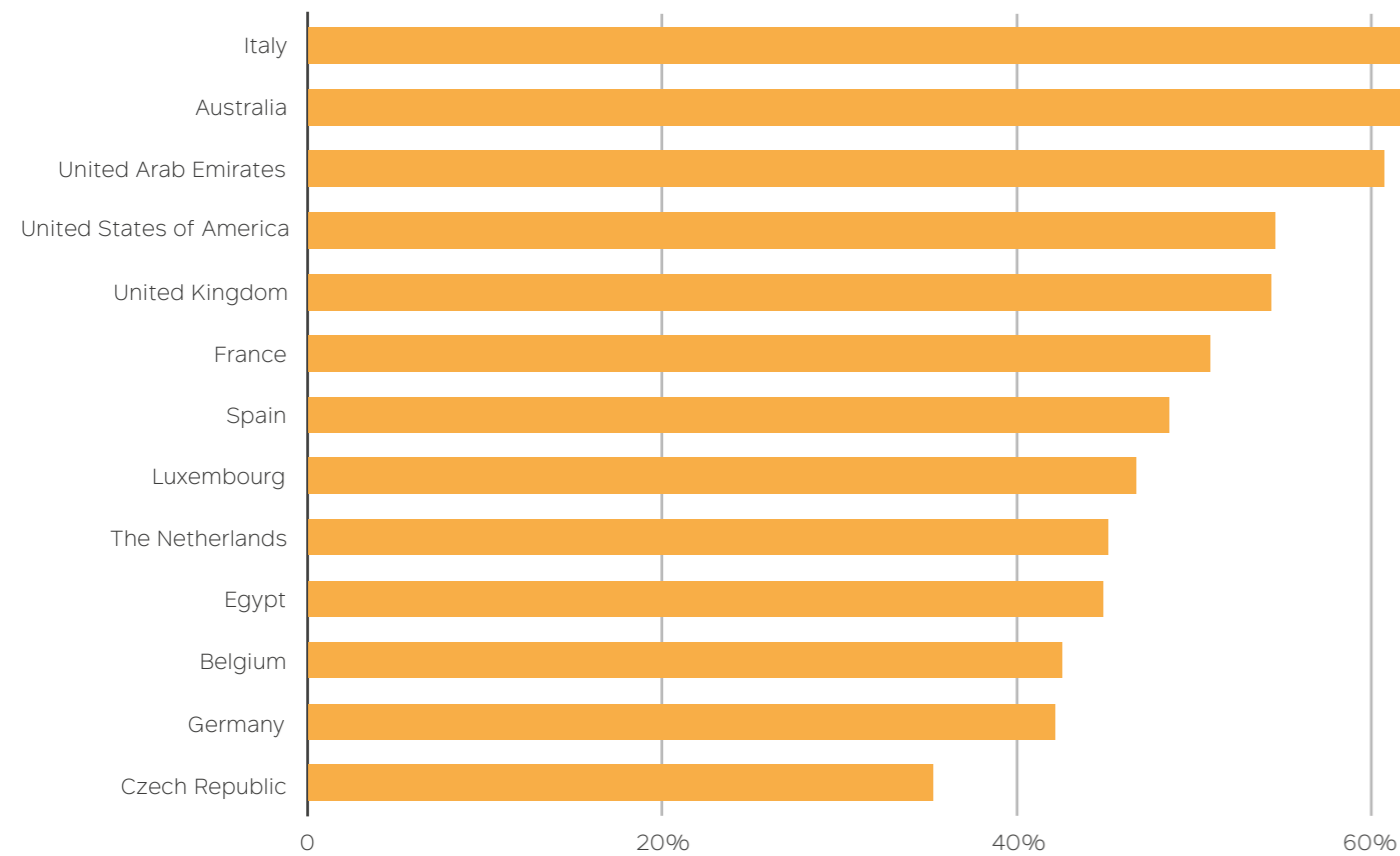
Countries

In 2019, we welcome six new countries to our global map! It's the first time we measured in Bulgaria, China, Croatia, Egypt, Jordan, and Qatar.



The majority of our projects took place in The Netherlands (37%), followed by France (19%), and the United Kingdom (9%). Next to these countries, we also measured countries like Sweden, Dubai, and Hungary.

Occupancy rates across countries



Graph 5. Occupancy rates across countries

We displayed the countries where we measured at least five times in 2019. Compared to past year we see that Australia has given its first place to Italy in terms of highest occupancy rate. This high occupancy rate is quite remarkable, while the occupancy of the other European countries is relatively low.

“

Measurement takes away the stress of running utilisation studies internally.

- Gensler, EMEA

05

Conclusions

Key insights

- Offices are shifting to combi and open offices
- Employees perform better from home than at the office
- Workplaces will be more designed around human needs

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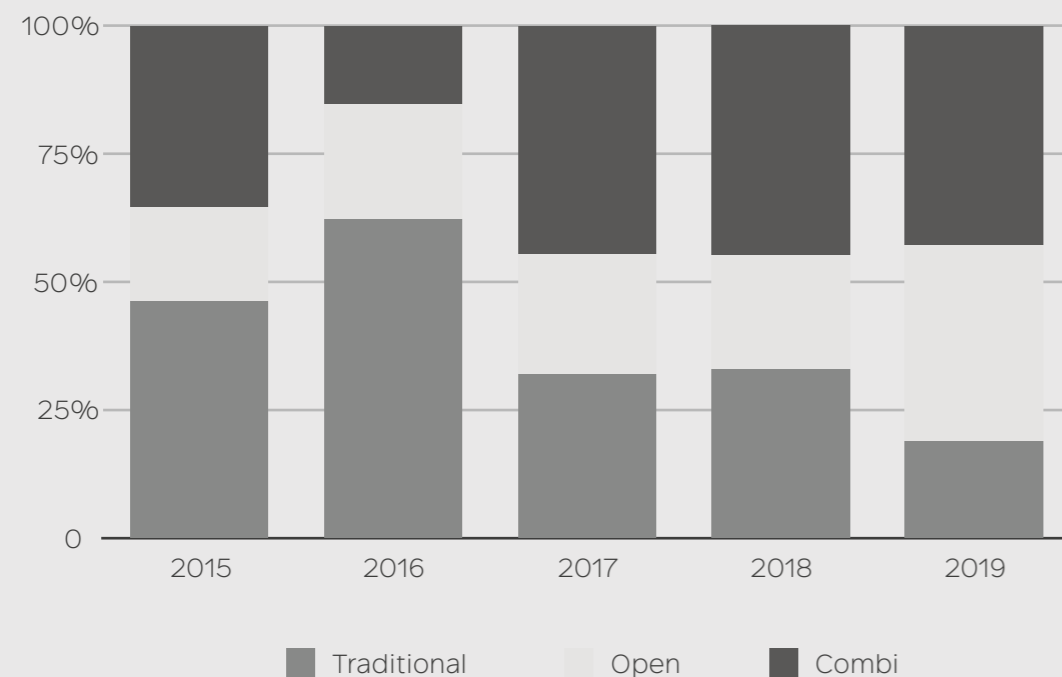
There is a gap between preferences and the actual behaviour.

In this chapter, we look back at five years of Annual Workplace Reports. By keeping track of the workplace trends using objective data across the years, we can also look at the future of workplaces. Continuous measurements seem to be the key to success. The data tells the story and is fundamental for the ideal workplace strategy.

In this chapter we summarise our most interesting findings of the past years. Next to that, we look forward to the future as well.

Looking back

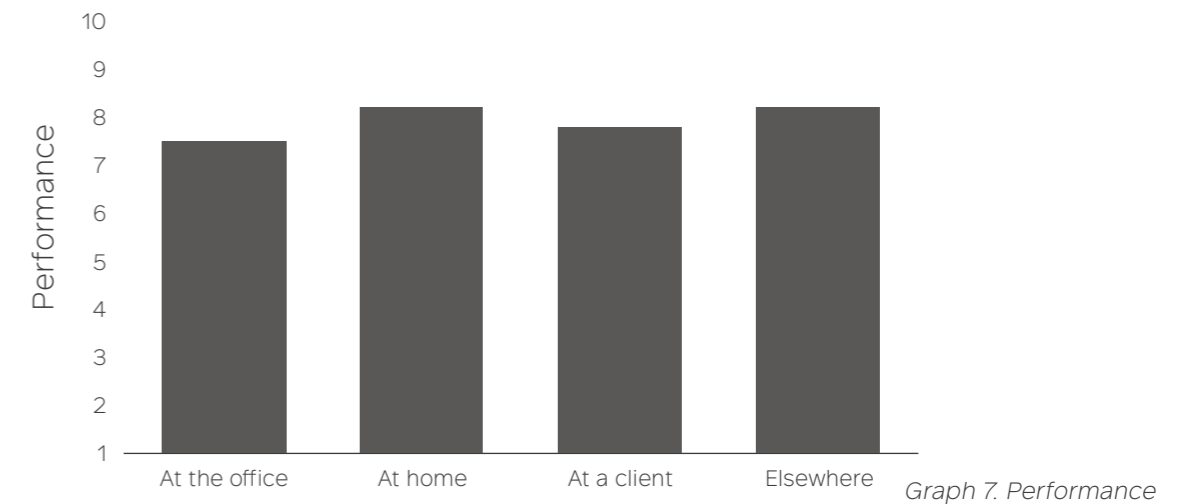
Across the past five years of publishing our Annual Workplace Reports, we've seen quite some changes in organisations. By measuring over 200 organisations a year, we gained a lot of insights in the global trends. First of all, offices made an enormous shift from a majority of closed, traditional office types to combi-, and open offices in just a couple of years. The office seems to have become an area that is more focused on interacting with each other. This change in workplace design is quite a demanding one for the employees working within it. Open workplaces are more subject to noise and employees are required to change spaces during the day which is known to be difficult and have lead to decremental productivity and satisfaction according to research from Hoendervanger et al., (2018).



Graph 6. Change of office types across years

With flexible workspaces, we also see flexibility in working itself. The global occupancy rate has been dropping with 5% between 2016 and 2018 from 52% to 47%. In 2019 the global occupancy rate is slightly rising again to 50%. Due to the increased quality of digital working, preferences of working from home, traffic strain, and the change of work itself, we expect that remote working will grow further in the future, which implies that occupancy scores will drop further. The first consequence of the increase of remote working are empty and costly office spaces. If the office becomes less of a place where we spend each day between 9 am - 5 pm, but rather a place where we come a few days to have meetings and work effectively, the office should become a smaller space, what will save costs and protects offices from becoming lonely and deserted places.

What's up next?



However, when employees do come to the office, it should have it benefits for them: facilities should outperform having online meetings, and should have better places for doing high concentration work than working from home does. Unfortunately, our Habital® data shows that currently, employees perceive to work better from home compared to work at the office. That shouldn't be the purpose of an office right? Offices need to become attractive and effective for the people who work there. The second consequence of remote working is that it becomes a challenge to oversee the productivity of your employees who are working elsewhere. Employees need to have a sense of control over their work to do it autonomously and effectively without too much direct supervision. But again, it depends on job description and personal preferences how workplaces and (remote) working policies should be designed.

Therefore, we expect and hope, that in the coming years, workplaces will be more and more designed and structured around the people who work there. In the end it is about the experience of employees who will be productive when they have positive experiences. Nevertheless, running an organisation is also about costs. We've learned at Measuremen that experience does not necessarily drop with higher occupancy rates, there are a lot of variables at play. Balancing experience of employees with effective use of space and tying them together, might be the trick in the coming years.



Justin Timmer
- In-house researcher

Thought Leaders' thoughts

No person, organisation and context is alike. The pitfall of systemic thinking and too much belief in predictability is ultimately only seeing the broad lines and similarities, whereby what makes each person unique is increasingly being overlooked or even labeled as deviant. Even though the insights from this report provide insight in the broad lines the true value of Measurement's Workplace Occupancy Study lies the aspect of behavioral mapping adding layer of depth and insight to our toolkit allowing us to better understand how work happens within the organizational context.

- Asael Akkerman, Head of Workplace Benelux, Cushman & Wakefield



Organisations are struggling with optimising workplace occupancy for years. More and more organisations are trying to optimise their occupancy levels in different ways, but the 2019 Measurement data shows that success is relatively limited. The average workplace occupancy remains very low with 50.4%. This means that there are very interesting challenges ahead in 2020. Curious to see if we can push the average occupancy up in 2020 and answer the question how far can we push workplace occupancy with maintaining a high quality employee experience.

- Jan Jaap Boogaard, Head of Workplace Advisory, Colliers International



As agile and activity based working models mature, the importance and application of measurement is also maturing. At issue is the need to not only understand occupancy in absolute terms, but to also understand the frequency and intensity of the interactions and activity patterns that can be determined from occupancy measurement.

- Chris Alcock, Principal, Six Ideas Australia



2020 and beyond

In the coming years we will focus more on the personal side of workplace improvement. The human-centered approach is here to stay. It does take small steps to mature and by providing permanent measurements our customers are given more real time insights in the ever changing workplace.

Adding metrics like activity analysis, personal behaviour, experience, characteristics and functional needs to occupancy and utilisation rates will help you make better decisions. All of these metrics can be found in our extensive BI platform and via interactive dashboards be compared with peers from all over the world.

Our goal is to improve workplaces worldwide, impacting 10 million people by 2025. And given the great feedback from our customers, our data helps them do so!

We will continue supporting our customers with the most accurate data possible and develop new insights based on dialogue with our customers and collaborate with our partners to share these insights worldwide.

Our Annual Workplace Report of next year will consist of even more data and more insight derived from our solutions to support the human-centered vision we have developed over the last few years.

We are looking forward to continuing our journey with you.

Vincent le Noble

- Founder and CEO

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