

# The modern workplace.

# 2020

People, places and technology.



An independent research report examining the latest insights and trends on what is shaping the modern workplace today.

# Contents.

	Forward	3
	<b>Introduction</b>	<b>4</b>
	<b>People</b>	<b>6</b>
01	<b>Flexible working.</b>	<b>7</b>
	Drivers of remote working	8
	Flexible spaces	12
02	<b>Employee experience.</b>	<b>13</b>
	Creating an employee-centric workplace	15
	Communicating culture	18
	<b>Places</b>	<b>20</b>
03	<b>ROI and productivity.</b>	<b>21</b>
	The rising cost of workplaces	22
	Introducing the four-day week	25
04	<b>Collaboration.</b>	<b>27</b>
	Creating flexible workplaces people love	28
	Expanding to co-working spaces	30
	<b>Technology</b>	<b>32</b>
05	<b>The connected workplace.</b>	<b>33</b>
	Managing meeting space	34
	Keeping connectivity secure	36
06	<b>Technology integration.</b>	<b>39</b>
	Managing space with software	41
	Integrating collaboration tools	43
	<b>Conclusion.</b>	<b>45</b>
	Appendix.	i

# Forward.

Condeco's state-of-the art survey, the modern workplace 2020, holds up a mirror to the way the traditional model of the office has been reformed. It was largely compiled before the global coronavirus outbreak turned the world of work completely upside down, but its findings provide valuable pointers to what the changed landscape of work will look like in what is being characterized as 'the new normal'.

Chief among the big shifts in the workplace is the move towards remote working, placing more emphasis on what happens outside the office and addressing concerns over our carbon footprint. One thousand business leaders from seven countries were polled for this report and nearly two-thirds of them expect more remote working in the next year. That figure rises to 70 percent if you extend the horizon to three years. But before we herald a new dawn, remember that one in ten companies are still not offering either flexi-time or remote working to their employees.

There is better news from the survey on employee experience. This ranks among the top three challenges for business leaders alongside talent retention and technology adoption. More companies are aware of how the workplace communicates culture, and they're taking steps to add features that make their people feel valued and trusted.

One would have expected business leaders to fret about productivity and return on investment (ROI). Like death and taxes, this is one of the few certainties in the topsy-turvy world of work – rising office space costs are always a worry. Less predictable was the sentiment expressed in the survey that cutting back on breakout, social and collaborations spaces would be a false economy. The consensus: organizations need a richer mix of spaces to succeed not matter how difficult that is to achieve. They also need to do more to measure ROI – and technology could help do this.

Generally, more than 70 percent of those polled believed that workplace technology has 'significantly improved' productivity in recent years – a better score than workplace design. Technology integration is also important to improve experience. As businesses also lean towards greater use of coworking spaces, wider adoption of video conferencing and a newfound interest in a four-day week, this Condeco report leaves us with the impression that the momentum of change is being driven forces that are deeper and broader than ever before. We live and work in interesting times.

## Jeremy Myerson

Director of WORKTECH Academy and Helen Hamlyn  
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**WORKTECH™ ACADEMY**

# Introduction.

**A recipe for a good workplace improves productivity, boosts employee wellbeing and acts as a magnet for talent and employee retention. But what does a good workplace look like? How do you divide office space between desks, meeting rooms and breakout areas to enable work to flow? How do you support different working cultures, varying generational age gaps, and promote successful working practices both in the office and for more flexibility outside of the workplace? There is no single answer to these questions, but what the research in this report does set out to examine how different companies, and their employees are dealing with these questions, and more.**

The workplace has seen many changes over several years but major forces, from workplace cultural shifts to technology developments and integration, environmental changes, as well as economic and financial implications, are all driving a shift towards more flexible working and diminishing regular attendance at the office.

The report is drawn from a survey of more than 1,000 workplace leaders, carried out in January 2020 across seven countries: The United Kingdom (UK), the United States of America (USA), France, Germany, Australia, Singapore and The Republic of Ireland. A third of respondents hold Chief officer (C-Suite) positions, with Chief Technology Officers (CTO) or Information Technology (IT) Managers and Directors also featured, as well as one in 10 have roles in workplace management. This was supplemented by 15 in-depth interviews with senior executives in the UK and USA; with roles including, Chief Officers in the charity sector and technology, Directors in the banking sector, commercial property development, technology and telecoms; Managers in the manufacturing sector, facilities management and workplace consultancy; as well as references from those within areas including healthcare, leisure, insurance and design consultancy.

The findings have been synthesized into six sections: The first section looks at the growth of workplace flexibility, not only in whether employees work at home or remotely, but also flexibly within the workplace itself. The second section considers employee experience, which is increasingly important for maintaining morale, retaining talent and attracting candidates.

Section three looks at return on investment and productivity. How do companies measure the effectiveness of their workplace and determine whether their money has been well spent? Section four turns to collaboration and considers how workplace design and remote working can each have a positive impact on productivity.

In section five the focus is on the connected workplace; from the extent to which employees can work on mobile devices, to whether they have meeting space available when they need it. Finally, we consider technology integration, how technology can be used to manage the workplace and what environmental benefits it can also bring.

The modern workplace is an ever-changing topic to investigate and research, and in this, the third release of the modern workplace report, published by Condeco, the statistics will continue to spotlight current trends, evolving viewpoints, and add commentary on business in an ever-changing 2020 landscape; with companies that manage this change most effectively will be best positioned to compete.

# People.

What is it that enables work to flow; and how is it that the employee experience can be improved?



# 01

## Flexible working.



**Flexible and remote working have been growing in popularity over the last few years. The widespread availability of Cloud services has made it easy to share documents and collaborate with others, while messaging services and videoconferencing allow teams to stay in touch easily. Just over half (52 percent) of companies have said that their employees work remotely at least some of the time. Meanwhile, 62 percent say that they expect more remote working in the next year, with this figure rising to 70 percent expecting to see more in the next three years. One CTO in the USA has stated that “remote working is part of the culture, the values of the place. It’s the opposite of presenteeism...”. This same workplace culture seems particularly strong in Germany and the Republic of Ireland, where 80 percent and 90 percent respectively expect a little or a lot more remote working in the next three years.**

## Drivers of remote working

Another factor helping to drive uptake of remote working is a change in employee culture. In making it possible to work anywhere, technology has also made it possible to work at varying times; with some companies expecting employees to respond to emails out of hours, and in return, employees are expecting more flexibility during work hours.

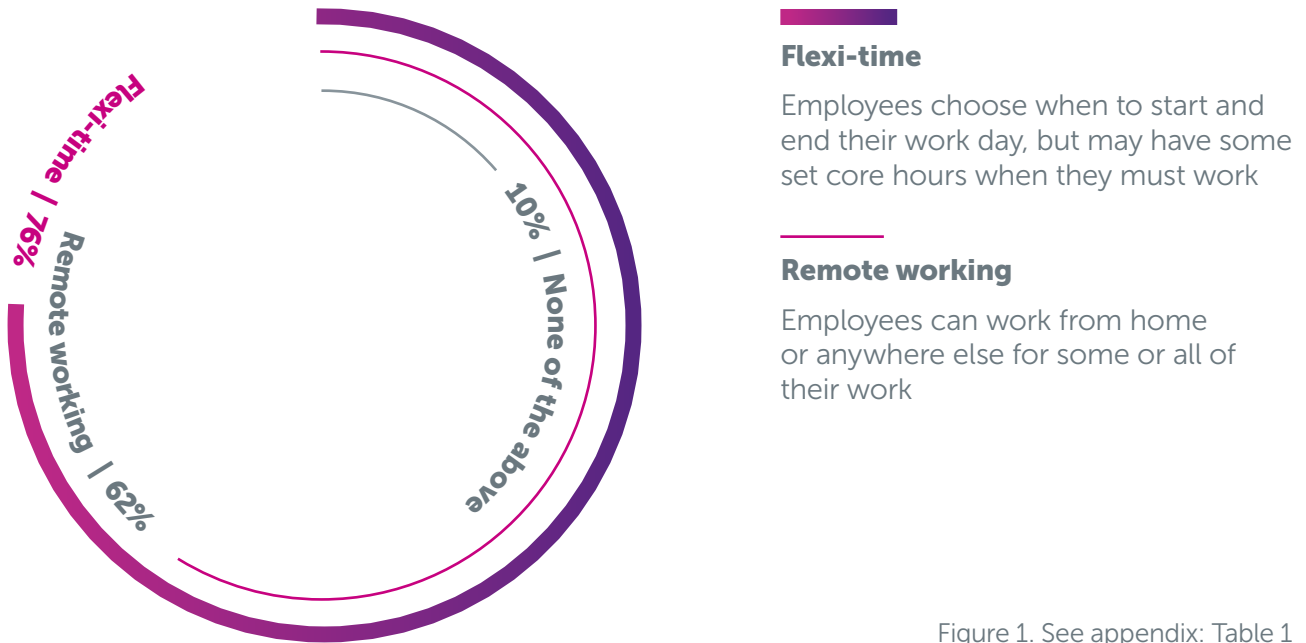
The result is more of a trade-off; employees expect more from their employer than just a salary. There is a greater emphasis on employers providing a satisfying experience, particularly if they want to attract the top talent. Half of companies (52 percent) in fact say that employee retention is one of the top benefits of remote working.

Companies have responded not only by allowing remote working but also by being flexible on working hours too. Three-quarters of companies (76 percent) offer flexi-time, which requires employees to work certain core hours, but then also gives them the flexibility to decide how to manage the rest. “In my department there are about 160 people [and] they know what they need to do to get the work done,” said a C-Suite executive in a UK firm. “However, if they don’t deliver and they’re not in the office they will be judged. It is up to them how they manage that time.”



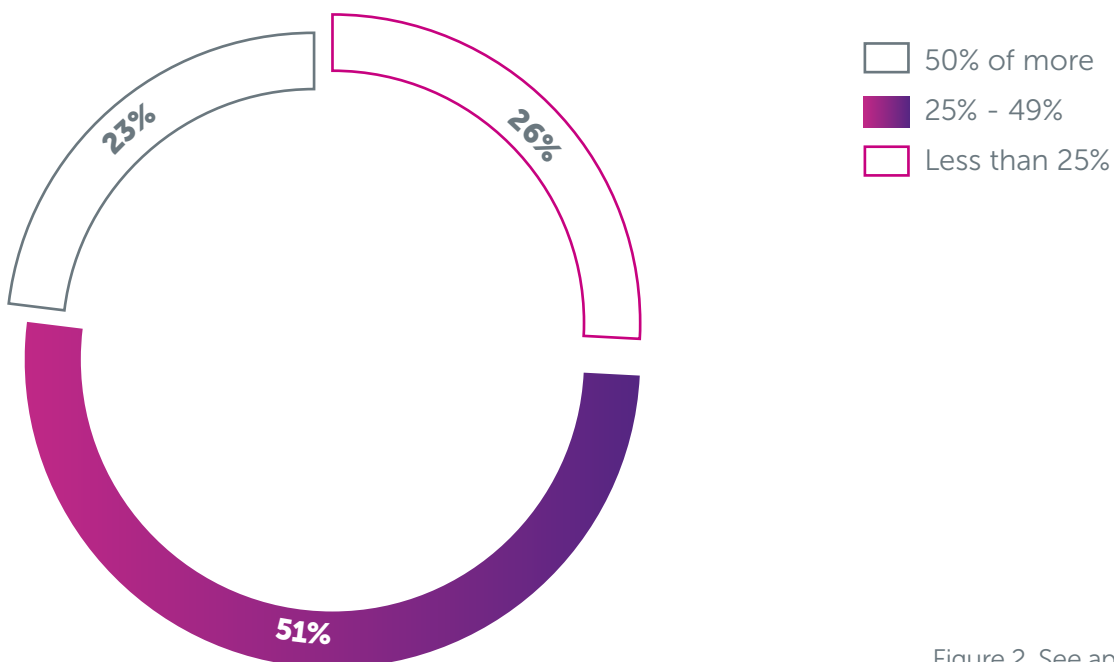
Flexible working

## Does your organization offer any of the following to some or all employees?



Remote working

## What percentage of your employees work remotely at least some of the time?



Despite a clear shift to flexible working patterns, 10 percent of companies currently offer neither flexi-time nor remote working. Asked why they don't allow more, almost half (48 percent) said they believe their work needs face-to-face interaction, while two-fifths (42 percent) cited security as an obstacle. A similar proportion (39 percent) said their employees prefer to be in the office. The security risk was far more prominent in Singapore, where 55 percent of respondents cited it as a reason for not offering remote working.

Interestingly, for roughly a third of respondents (35 percent), employees must be in the office because the space is paid for and should be used. There is the potential for this to become a circular argument where companies pay for office space because their employees need it and then require them to come to the office because the space is paid for. However, it is easy to understand why a company might be reluctant to encourage more remote working if it has paid for a technologically enabled office, complete with a range of spaces for different kinds of work.

Finally, 32 percent of respondents said they don't allow more remote working because it is not good for productivity. This however seems to be a minority view – as we will see later, it is more common to believe that remote workers are more productive.

Remote working

### What is stopping you giving more employees the ability to work remotely?

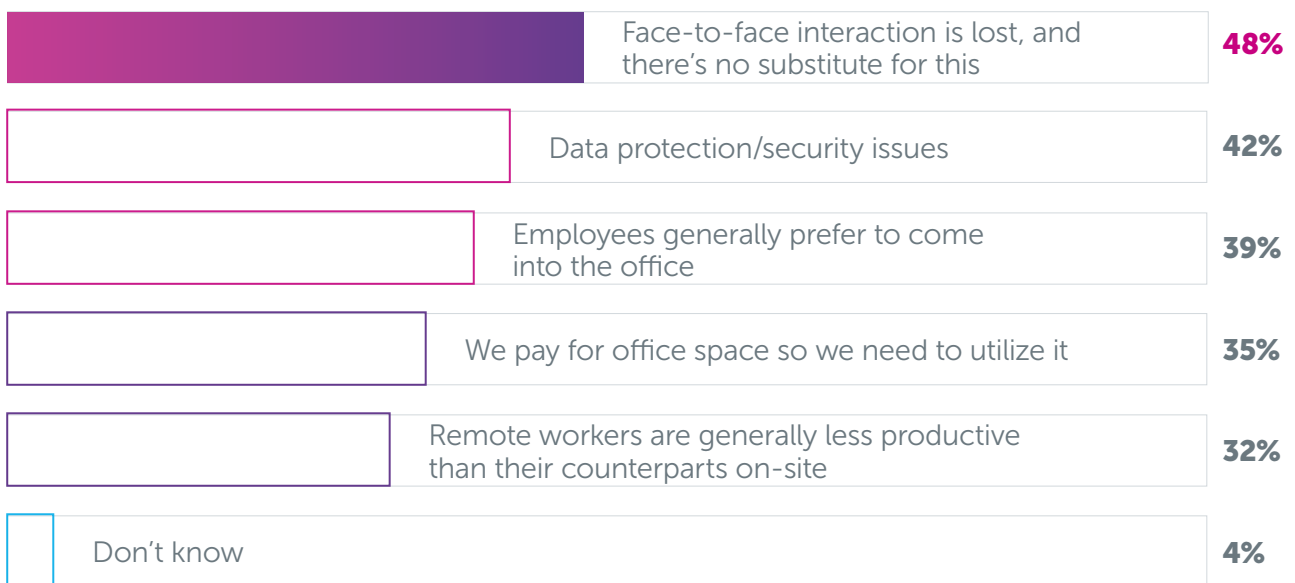


Figure 3. See appendix: Table 4



**...62% say that they expect more remote working in the next year, with this figure rising to 70% expecting to see more in the next three years.**

## Flexible spaces

The view of not allowing more remote working is likely to change. However, given that only seven percent of respondents expect there to be less remote working in a year's time, and the same proportion expect less remote working in three years' time, the overwhelming opinion is that remote working will grow, with between 60 and 65 percent of all those in Australia, France, Germany, the Republic of Ireland, the UK and the USA surveyed agreeing; only Singapore averaged lower at 55 percent agreeing that there will be a growth in the remote working rate.

One of the biggest challenges for companies in these timeframes will be managing the amount of office space they provide, as an increasingly flexible workforce is still likely to require a hub to which they can return for certain tasks, such as meeting clients or face-to-face check-ins with colleagues.

Flexibility is not only about working hours but also how the work gets done. Just over half of respondents (54 percent) say they now have flexible, shared workspaces within their offices. These spaces can be adapted to the needs of the occasion and the working cultures of those using them. A simple 'break-out' area, for example, could be a space for a quiet breather on a busy day, an ad hoc team meeting or a place to quickly collaborate on a small project.

Almost half of companies (46 percent) have created additional co-working spaces outside their normal office environment. We'll consider these further in section three, below, but the appeal of these spaces is that they can often provide an environment that feels different. For example, making a traditional and conservative company feel and act more like a start-up.

# 02

## Employee experience.





**Employee experience is increasingly recognized as a vital factor in business performance. Getting the best employee experience depends on a complex mix of influences, but the workplace and its role in wellbeing and company culture are important components as a US-based C-Suite executive highlighted the fact that they “spent a lot of time planning as (they) really wanted to make the space work for (them).” He also mentioned taking into account the fact they “have quite a young demographic – so (they) thought about what they were looking for...”, with “customizable spaces for meetings and booths for salespeople to hold meetings with clients”, and also mentioned huddle spaces which supported more informal collaboration.”**

Younger employees now expect to build a career across multiple employers and are selective about their moves. At the same time, employees as a whole, conditioned to expect ever better customer experiences, see no reason why their experience should not be just as good. The smartest businesses are responding, but it is a challenge.



“

**We have put a heightened focus on culture, I put team building at the heart of our workspace design.**

Facilities Management, USA



# Creating an employee-centric workplace

The key challenges for business leaders are, according to our research, almost a three-way tie. Talent retention and employee experience (32 percent) is tied with technology adoption (32 percent) as the most pressing issue, followed by digital transformation (31 percent). Technology adoption is a particular challenge in Australia, where it was cited by 44 percent of respondents, while digital transformation is a significant issue in Singapore (51 percent). An employee-centric workplace is a crucial factor in experience and talent retention.

## Business challenges

### What do you see as your biggest organizational challenges at the moment?

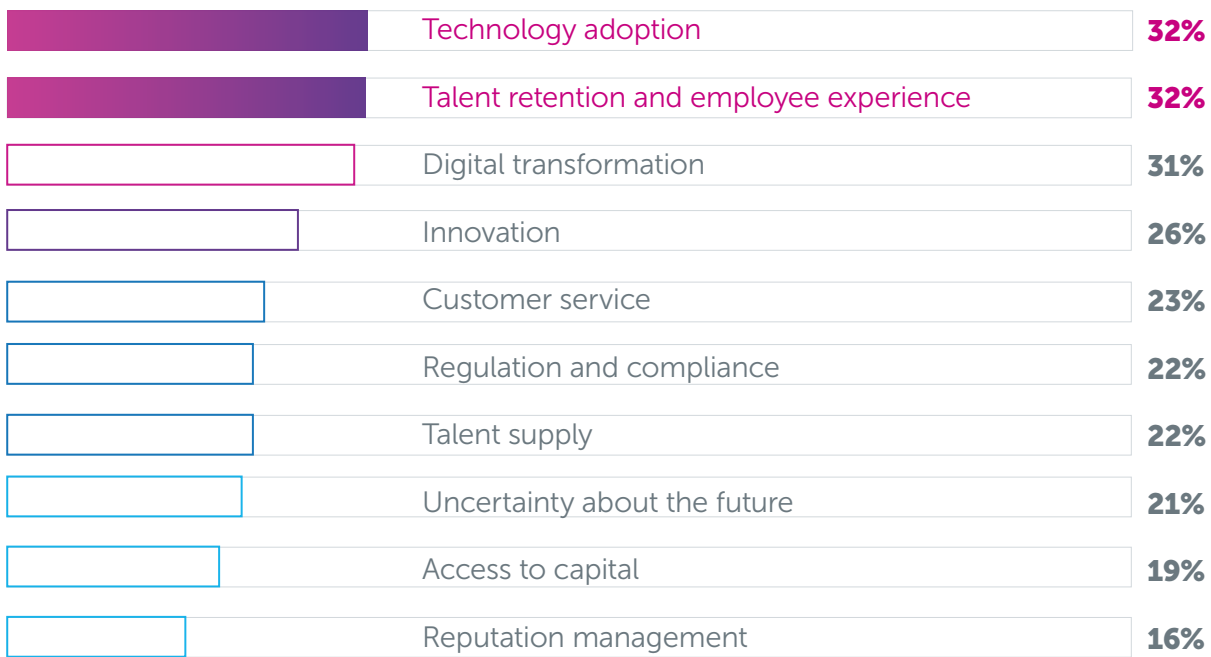


Figure 4. See appendix: Table 29

Workforces are diverse and an employee-centric workplace is not one where everyone is treated the same. One respondent in the in-depth research mentioned that he had noticed a generational divide, with older employees preferring a quieter and more stable working environment, while younger employees preferred more noise and adaptability. Other respondents noted a difference in the working styles of introverts and extroverts - and a corresponding difference in their preferred working environments.

“...we need more spaces for formal collaboration and also for informal and more social employee interaction. I think that is important in building a sense of shared culture and community and we are not there yet,” said one respondent, a facilities manager in the USA; and adding to this, another respondent, also a facilities manager in the USA, mentioned that they “have put a heightened focus on culture... (putting) team-building at the heart of (their) workplace design.”

It is interesting to note too in a changing working landscape and within environmental shifts, that although agile setups are now the norm, there is still a culture of fixed desks in many companies. Though a minority of organizations have moved to a full flexi-desk or ‘hot desking’ approach, almost two-thirds (63 percent) said that employees have their own desk but are free to work anywhere in the office. “Hot desking is not right for us...” said a one US-based C-Suite executive, and mentioned that in wanting to build strong relationships within their teams, they “also have the space to allow people to work flexibly.”

Assigned desks

**Do employees with assigned desks still have the ability to work in different places?**

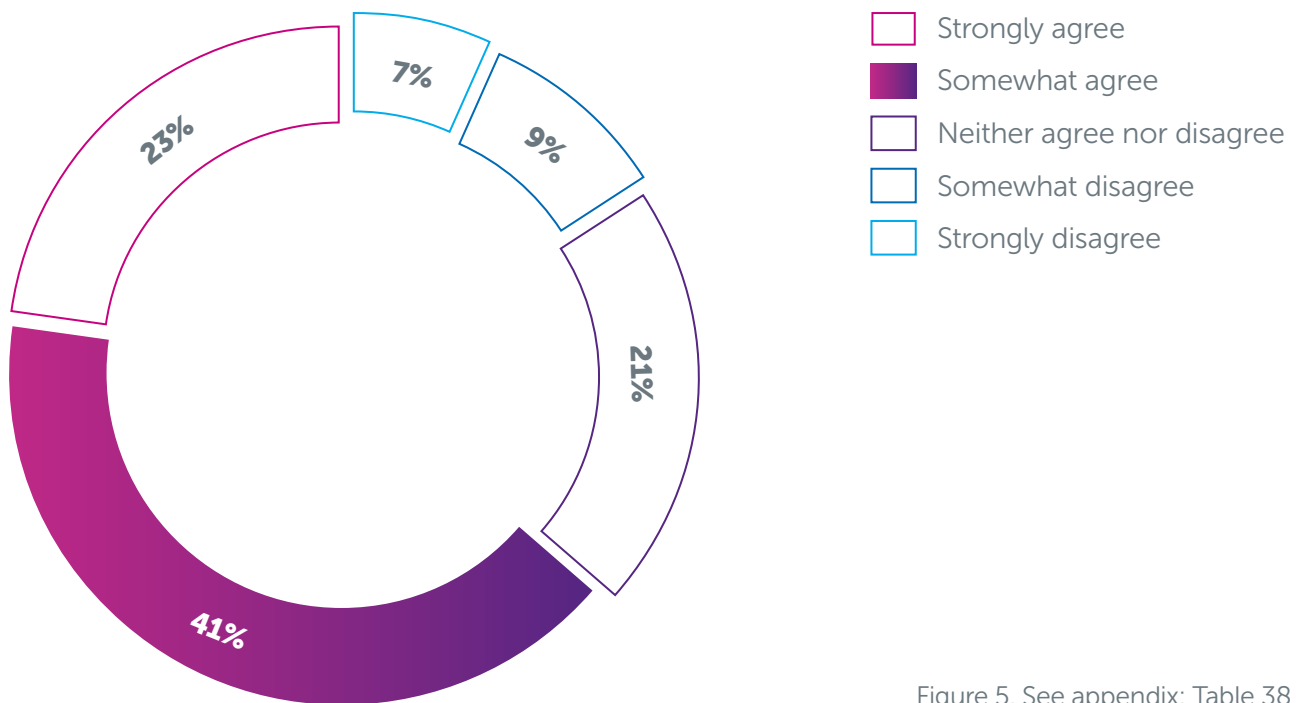


Figure 5. See appendix: Table 38

Some organizations, typically those with a more flexible workplace and culture, are ditching desktop computers entirely and equipping their teams with laptops; this in recognition of the fact that employees now expect to be able to work when and where they want, therefore needing technology to make that possible.



“

**By going agile I have seen a firm save a lot... involved staff from the start and listened to their needs and presented its aims to improve the working environment so that they have spaces that reflect the tasks they are doing. The money they spent has already been recouped in just over a year...and they now have happier staff.**

Senior Office Designer, UK

# Communicating culture

Some of those business leaders surveyed made a link between the workplace and overall wellbeing of their teams. Access to natural light, the presence of plants to improve air quality and suitable spaces to take a head-clearing break were all mentioned as being important for helping employees staying energized and alleviating stress.

## Workplace design

### Changes in the design of our workspaces have significantly improved our productivity in recent years

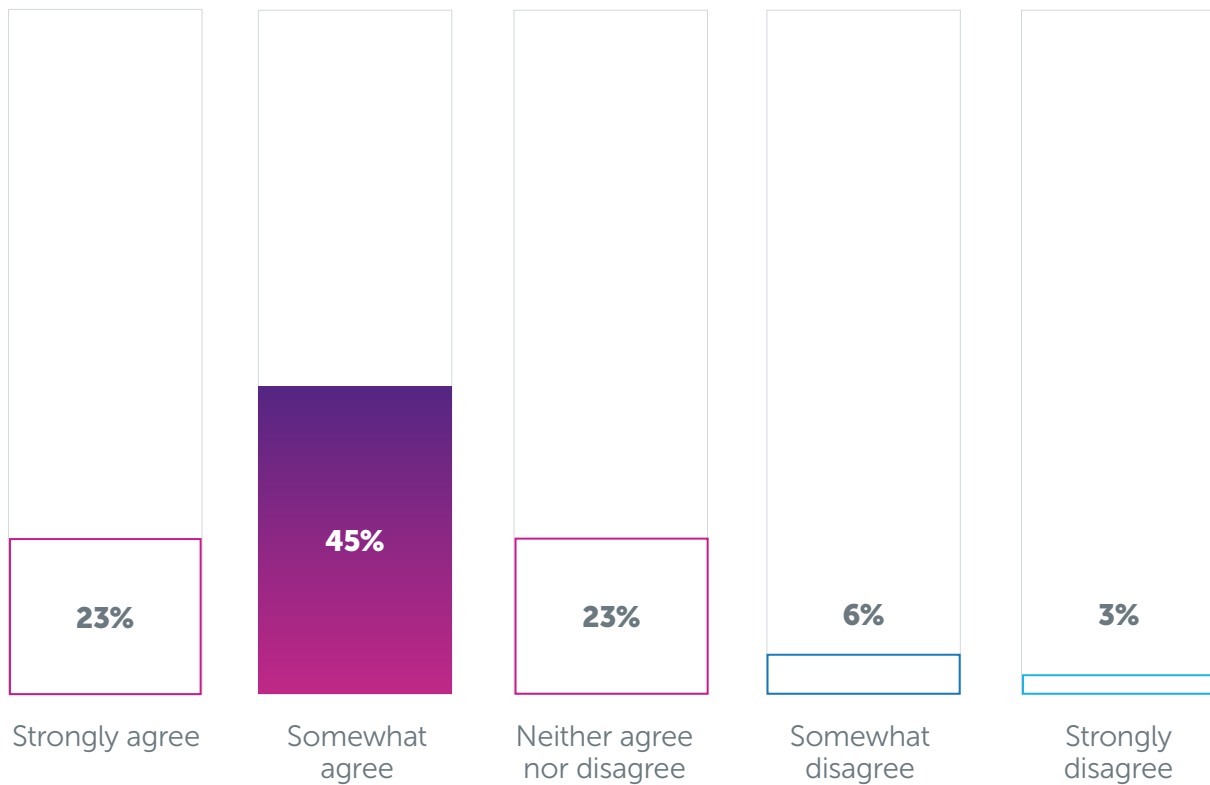


Figure 6. See appendix: Table 40

“We did work with an Austrian bank that really put a lot of thought into how its workforce would adjust to a new open plan situation and, crucially, they made the investment,” one respondent, a developer in the USA said. “They gave employees more space with around 20 or at least 15 square meters per employee. In most markets you’re probably looking at eight square meters at best. I saw that they were really investing in their staff, giving them the best working environment in which to be productive.”

The workplace is about more than just providing some desks and chairs in a building where people can come in every day to get their work done; moreover, a workplace communicates company culture. Older, more conservative sectors and businesses will choose buildings and decorations that convey a sense of seriousness, perhaps with heavy carpets and art on the walls. A younger company in a 'trendy' sector might opt for stripped wooden floors and exposed brickwork. A travel agency might decorate with pictures of the destinations they serve, while a charity might have photos of the communities it supports.

Culture can also be communicated by the facilities available, from cafés and restaurants, to gyms and meditation rooms. "We want our workplaces to make employees feel appreciated and respected, not taken for granted," said a US-based facilities manager, who continued by expressing how they "put considerable thought into how they can use the spaces", in order to enhance their employee wellbeing and productivity levels.

The modern workplace has a vital role to play as both a driver and reinforcer of company culture and a central tool in developing employee experience. A well-designed, employee-centric workplace, built with communication and collaboration at its heart, can create greater transparency and foster a sense of common purpose. Companies that understand this will be well-placed to gain an advantage in the battle for talent.

# Places.

Enabling a flexible workspace; one where collaboration and productivity are at the center of it all.



# 04

## ROI and productivity.



**Managing the productivity of a workplace used to be about controlling costs and fitting as many people in as possible. However, as we have seen in the previous sections, the workplace must now also offer flexibility for changing modes of work and be designed to maximize employee experience.**

These needs have to be balanced against the effectiveness of the workplace and its cost. A workplace needs to help the company stay productive and deliver suitable return on investment (ROI). If it doesn't do that, the flexibility and experience won't count for much. The challenge then is to balance all of those needs and measure effectiveness, as one C-Suite Executive in the UK reiterated by stating that he is "convinced that properly designed workplaces improve productivity. It makes intuitive sense...", by focusing on getting the basics right, like the right desks and chairs, as well as advanced technology and infrastructure that works.

## The rising cost of workplaces

The first issue, however, is dealing with the rising cost of rents and office space. More than half of those surveyed (61 percent) said this was a concern, and a third (32 percent) said one of their biggest challenges was finding sufficient space as rents increase.

This puts pressure on companies to use space efficiently but simply squeezing in as many people as possible is not the answer. That would mean cutting back on the space that can be devoted to breakout and collaborative areas and, as we have seen, that would not fit the modern way of working. This is perhaps why almost half of those surveyed (46 percent) said their company does not have the right mix of spaces – a figure that rises interestingly to 59 percent for respondents in France.

Overall, 31 percent of employees state that their firms offer the right mix of spaces, with respondents in the USA (41 percent) and Ireland (45 percent) even more likely to be satisfied, though even those figures are below half.

The first step in finding the right mix is to know how your present capacity is being used. If a significant proportion of staff work remotely then how much space is truly needed? Simply scheduling people to be in the office at different times might mean that there is enough space for everyone. However, almost two-fifths of companies (38 percent) say that measuring occupancy and utilization is a major challenge today, and 42 percent expect it to be a challenge in three years' time. Around half of companies (52 percent) said they could do more to measure ROI. Some companies are turning to technology to help.

Measuring ROI of workspace

**To what extent do you agree or disagree with the following statements about your organization?**

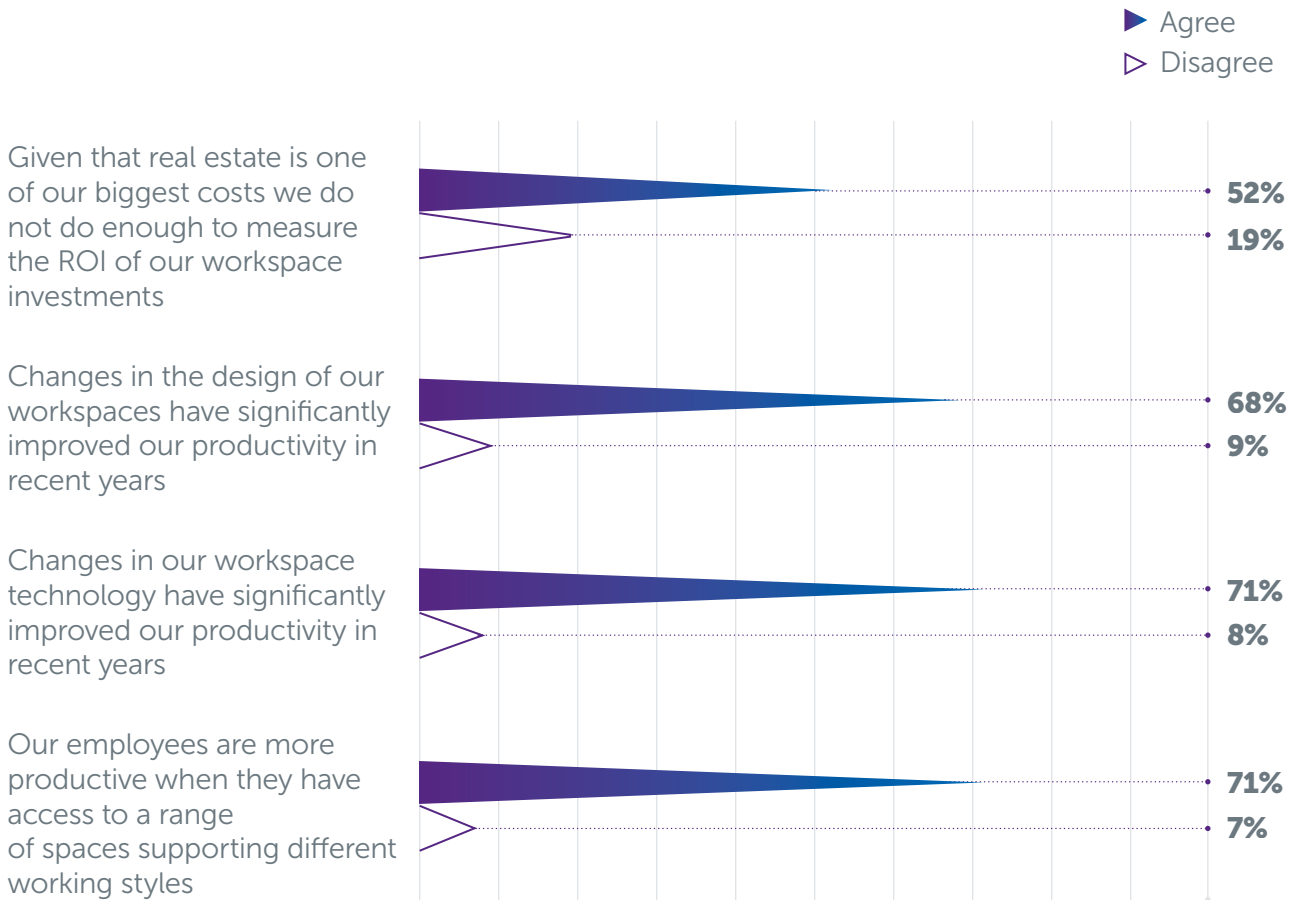


Figure 7. See appendix: Table 39, 40, 41, 42

Employee health and productivity was also highlighted by a research respondent from the USA, a developer, who noted that many of the things that promote the two, “are inherent in the buildings themselves such as the quality of light and air, the materials used and the sound proofing...”, also noting too that “internal detailing and design, and of course the square footage allotted to each employee” should also be considered.

Then, in moving specifically to ROI again, a C-Suite Executive in the USA was adamant in stating that “you have to measure (it)”, expanding on this by saying that they see the need to be able to allocate capacity, generally allowing 100 square feet per person, although also saying that crunching the numbers a bit would also be welcome too.

A majority of respondents (71 percent) say that changes in workspace technology have significantly improved productivity in recent years, while 68 percent say changes to workspace design have had similar benefits.

As we saw in section one, the need to keep costs under control is one reason why companies approve of remote working. Another is that it improves productivity and so helps the company achieve its purpose while also relieving pressure on the office. A fifth of respondents (19 percent) said that remote working makes staff “much more productive”, while a quarter (25 percent) said it improves productivity a little and a third (32 percent) said that productivity stays about the same. Just one in four (24 percent) said that productivity was less with remote workers.

Productivity

**Generally speaking, do you think remote working employees are more or less productive than their on-site colleagues?**

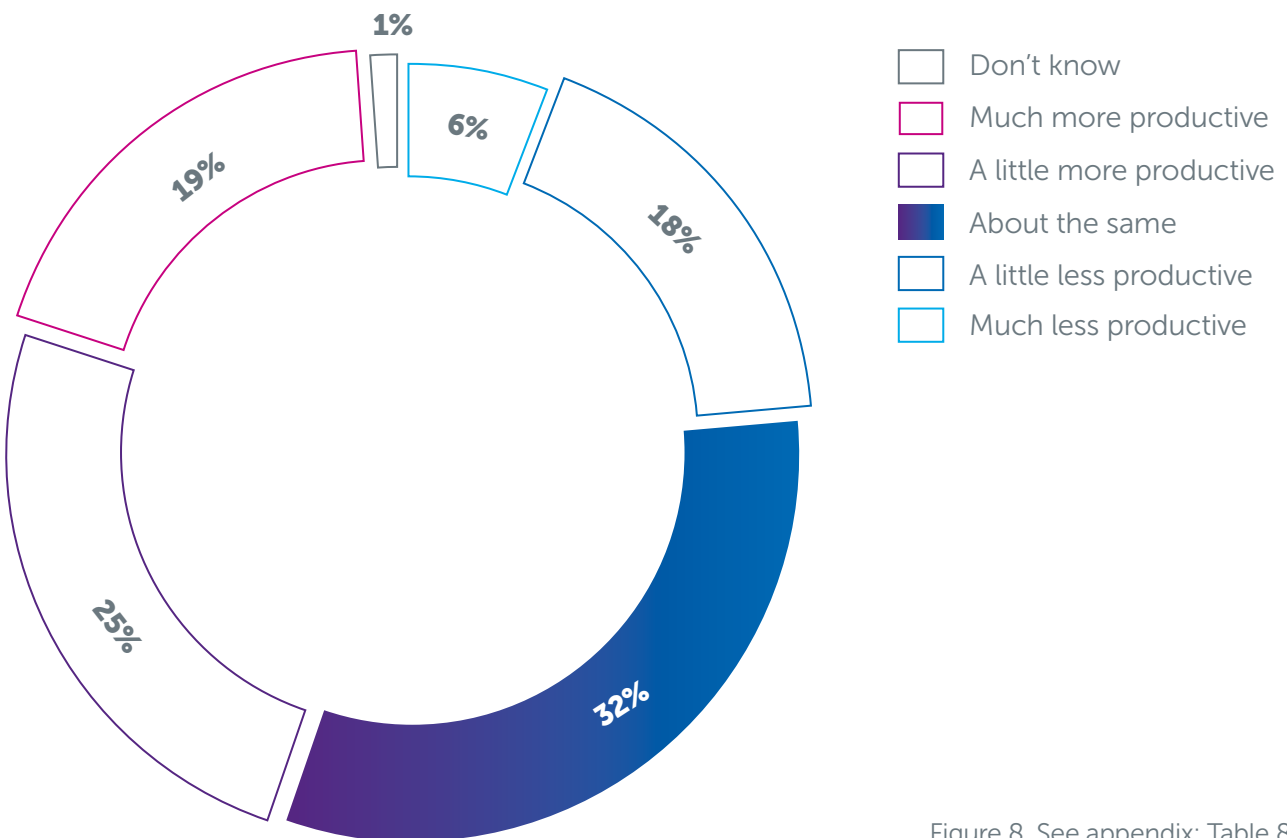


Figure 8. See appendix: Table 8

There were some regional differences, however. Two-fifths of respondents in the Republic of Ireland (40 percent) said that remote workers are much more productive, while only a third (34 percent) of respondents in France said that remote workers were a little or a lot more productive.

# Introducing the four-day week

Companies could go further, however, and introduce a four-day week. This is something that has been suggested by various commentators, initiated in certain countries and industries already; all in part as a response to the growing automation in various sectors, but also to improve wellbeing and reduce burnout. It is also possible to see it as a way of easing pressure on workplaces: a company that brings in four-day weeks could have a fifth of its workforce absent at any time, meaning more space for everyone else.

## Productivity

### How do you think your organization’s overall productivity would be affected if everyone moved to a four-day week (with no less pay)?

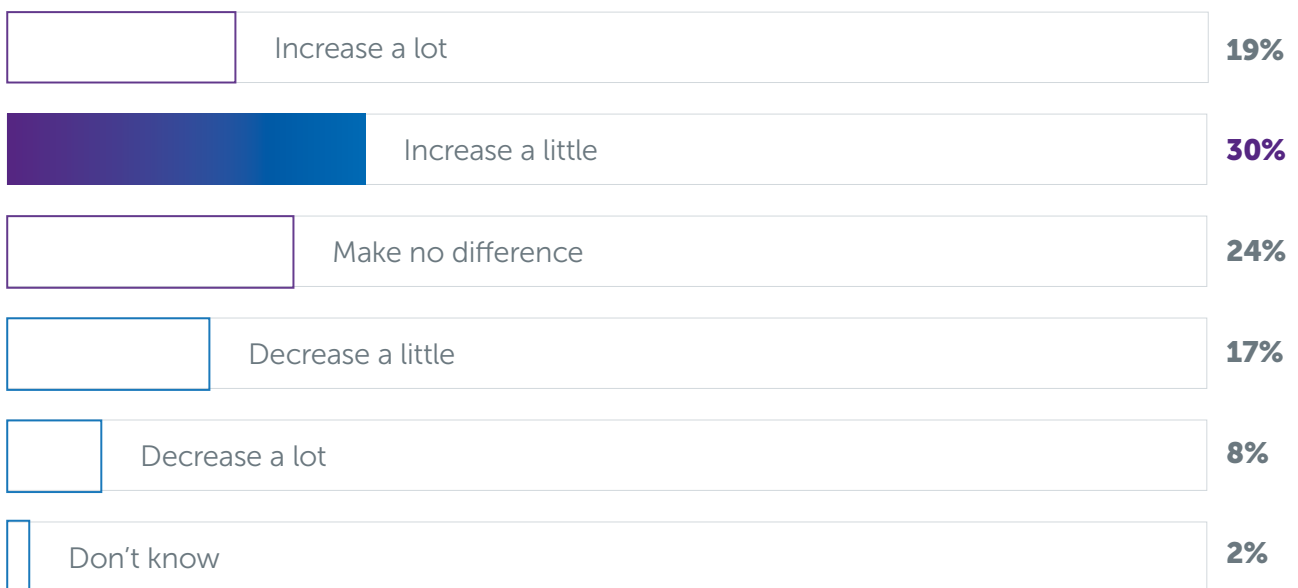


Figure 9. See appendix: Table 10

In the research conducted, respondents were asked about what effect a four-day working week, with no reduction in pay, would have on morale and productivity? In the case of morale, it is not surprising that more than half of respondents said morale would improve a lot more (19 percent) or a little more (34 percent). A fifth of respondents (19 percent) felt that a shorter working week would make no difference to morale, while just 10 percent said morale would be “a little less” and three percent felt it would be “a lot less”.



Perhaps more surprising is the response when asked about the effect on productivity. A fifth of respondents (19 percent) thought that it would make workers a lot more productive, while a third (30 percent) thought it would make them a little more productive. Around a quarter (24 percent) thought the effect would be the same and a similar proportion (25 percent) thought that productivity would decrease.

Respondents in Ireland were considerably more likely to believe that a four-day week would increase productivity (60 percent, compared with 49 percent globally), while those in France were significantly more likely to believe a four-day week would be less productive (36 percent, compared with 25 percent globally).

Ultimately, whether companies move to a four-day week or introduce more remote working or a flexi-time approach, the employees who still regularly attend the workplace will need that space to work for them in order to maintain their productivity and effectiveness.



**A fifth of respondents said that remote working makes employees much more productive.**



# 04

## Collaboration.



**Since the face-to-face aspect of the workplace is one of the prime reasons why many leaders say that offices are still vital, it remains important that companies have viable spaces in which those meetings can take place. With growing numbers of employees starting to work remotely, at least part of the time, and technology growing in capability, it seems likely that videoconferencing will replace some face-to-face meetings.**

Employees need different spaces for different tasks if they are to perform at their best. Concentrating on writing a report or a presentation requires quiet and focus, brainstorming new product ideas requires a relaxed space for a small team, and a formal budget-planning meeting needs a private room, perhaps for a larger group. The ideal environment is one that enables work to flow from one context to another.

## Creating flexible workplaces people love

From those that participated in the research and the companies they represent, many were at different stages of evolution in adding variety to their workspaces; space though, is not Interestingly, companies seem to be creating more, highly adaptable, large areas that can be used as a café-style area, as well as for staff meetings, client events or even conferences.

### Business solutions

## When meeting space isn't free, where do you have sensitive/confidential conversations?

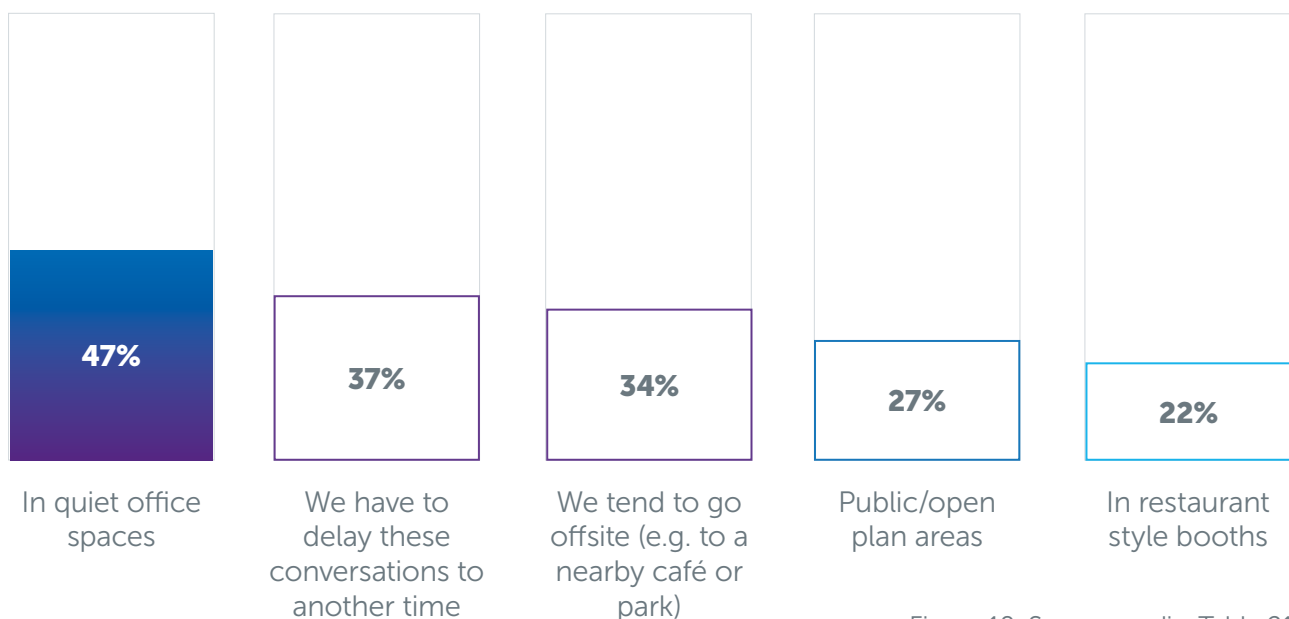


Figure 10. See appendix: Table 21

A little over half of respondents (54 percent) said they offer flexible working spaces and 71 percent said their staff were more productive with a variety of spaces in which to work. Of those who had adapted the design of their spaces, 68 percent said they had seen improved productivity.

The research has found that workplaces are increasingly being designed for adaptability. Shared breakout areas are being offered so that employees have somewhere informal to work, typically without needing to book. With space at a premium, many areas are required to be versatile, with furniture that can be moved or removed so a space can be used for team meetings, client workshops or even lunchtime yoga classes.

One C-Suite Executive, based in the USA, told us that “the other half of (their) floor is like a huge living room with multiple breakout areas... and on another floor (they) have a very large kitchen and a town hall style room which is made very good use of for all-staffs and for events.” All highlighting again at the versatility of space and how we can use the space to accommodate multiple usages; with 71 percent of research stating that employees are more productive when they have access to a range of spaces that support different working styles. There was a similar level of agreement, 68 percent in fact, that changes in the design of the workplace in recent years have significantly improved productivity. Given the cost of office space, and its importance for productivity, it seems clear that more companies should prioritize measuring the ROI of their workplace investments.

## Expanding to co-working spaces

While companies may have their headquarters in one location, with the rise and demand of more flexible working, there has been a shift to lease or purchase smaller co-working offices in different locations for employees to also have access to. Sometimes these are used as an overflow to ease pressure on the main office space, while at other times they are a site at which to cost-effectively launch operations in a new location

These goes hand in hand with the rise of remote working, and the need for employers to offer this to their employees. Adding to this, asked why they offer remote working, this need sees a third of employers (36 percent) giving employee demand as a reason. That proportion was much higher in France (56 percent), and notably lower in the UK (26 percent). However, it was not the main reason. Productivity was the most popular reason (60 percent), followed by workforce diversity (46 percent) - for example, ensuring that parents are able to balance work responsibilities with childcare needs.

Remote working is not all about pleasing employees, however. Three of the top five benefits mentioned in the survey were for the business: cutting costs by not having to provide office space (42 percent), being able to scale employee numbers easily as business needs change (41 percent), and allowing employees to still work while travelling (37 percent).

### Co-working spaces

#### Which of the following applies to your organization?

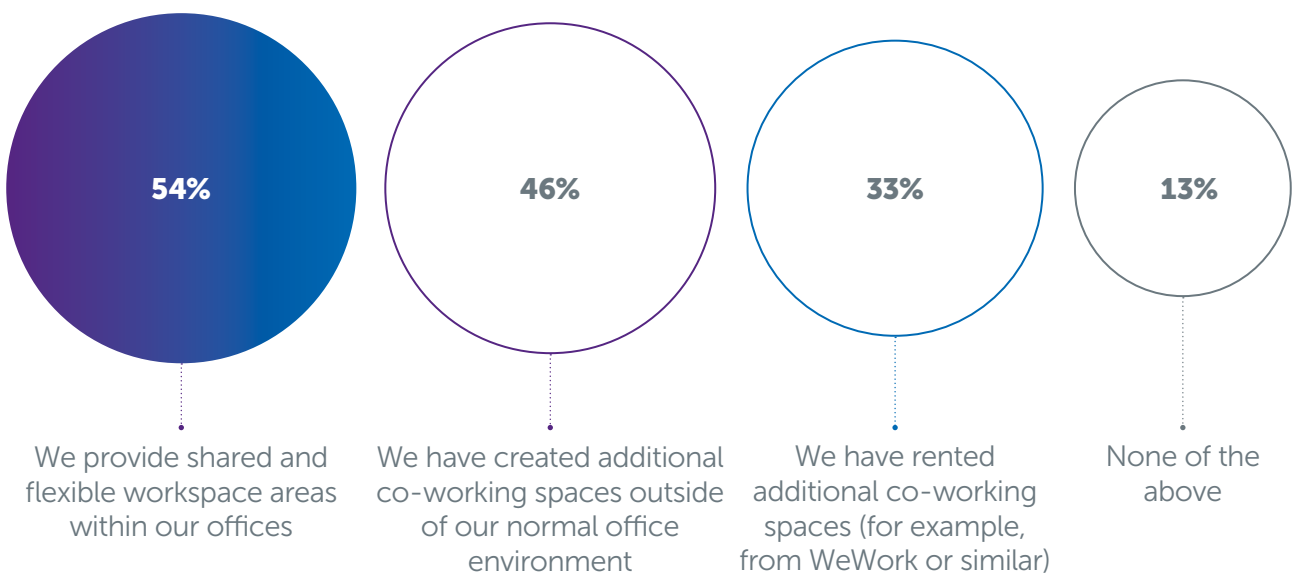


Figure 11. See appendix: Table 33

For many employees, working remotely means working from home or while travelling, from a café or hotel. However, a third of companies say they have rented external co-working spaces

Co-working spaces

**Why has your organization created additional co-working spaces outside of its normal office environment?**

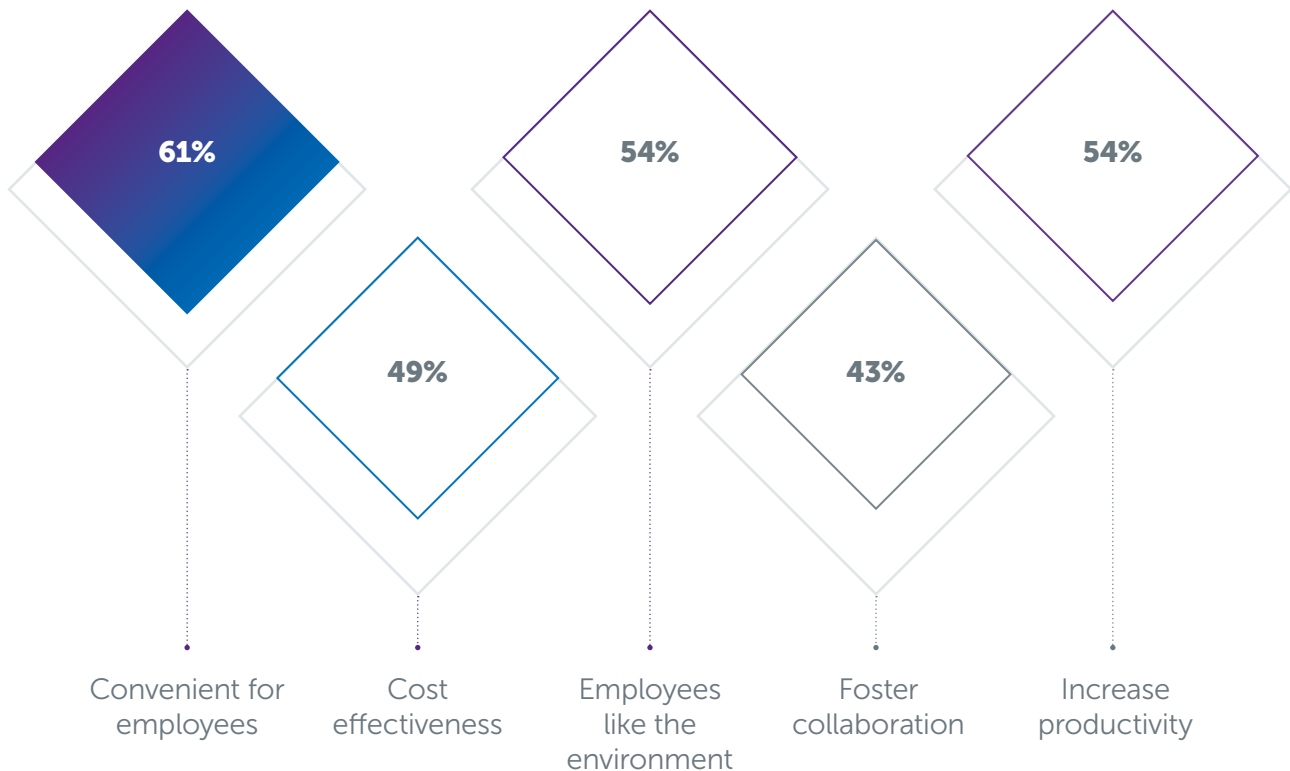


Figure 12. See appendix: Table 34

A CTO in the USA also noting that from their 20,000 employees, their campus only has space for 8,000, so for them, there is a need for co-working spaces that they have rented, stating that “there is a need for this sort of flexible option, (as) it is handy for what (they) call a ‘burst space’ for temporary use...”

Companies like co-working spaces because they are often convenient for employees and provide a good atmosphere and a collaborative environment. Slightly over half (54 percent) say that they are good for productivity, while a similar proportion like them because they are cost effective (49 percent). A little over two-fifths (43 percent) say that additional co-working spaces foster collaborative working.

Co-working spaces can, as mentioned above, also allow for changes in culture. With modern connectivity tools, there is no reason why a workforce, or even individual teams, cannot be spread over multiple sites and still work effectively.



# Technology.

Making space work hard through a connected workplace:  
Rethinking technology and systems integration.

# 05

## The connected workplace.



**Companies and the technology they deploy are in a constant state of evolution. The trend towards remote working is being driven, in large part, by changing cultural norms and by technology, which is now mature and dependable.**

A key workplace challenge for organizations in 2020 is how they keep their workplaces updated. For those with multiple locations, it is important to keep older buildings up to the same standards as the flagship location. Inconsistency across the portfolio can breed resentment. Another challenge is managing limited space.

## Managing meeting space

As the workplace as a whole is designed for adaptability, that naturally means less space available for formal meetings. Therefore, many companies are responding by offering more non-bookable spaces for formal and informal meetings. These could be impromptu team meetings or quick one-to-one catchups with colleagues, which could take place in a range of areas, from pods and booths, to sofas and even stand-up desks.

“Meeting rooms are a source of tension within the business [because] as an organization we are under pressure for space and, as a result, meeting rooms are very heavily utilized,” states a CTO in the UK, whose situation is by no means unusual.

### Meeting spaces

**Do employees in your organization generally have access to the right types of meeting rooms when they need them?**

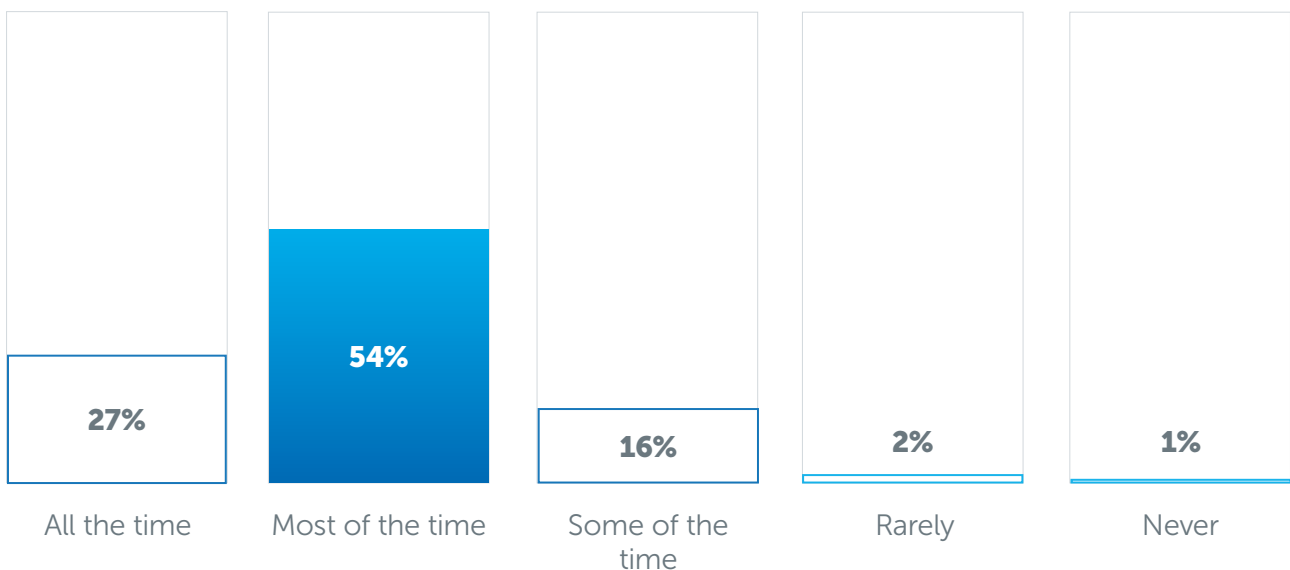


Figure 13. See appendix: Table 20

Despite that, only a quarter of respondents (27 percent) said that meeting rooms were available at all times in their organization, with respondents in the USA being most likely (34 percent) to always have a room available. Half (54 percent) said rooms were available most of the time, a figure that rises to 65 percent in both Germany and the Republic of Ireland. Fewer than a fifth of respondents (19 percent) said that rooms were available sometimes, rarely or never.

When meetings rooms are unavailable, almost half of respondents (47 percent) said that the alternative was a quiet space somewhere else in the office. Around a third (37 percent) said the alternative was simply to wait until a room becomes available, while a similar proportion (34 percent) said that some kind of offsite space, such as a nearby café, was the preferred alternative. For a quarter of those surveyed (27 percent) the meeting could be held in a public or open plan area, while a fifth (22 percent), would find space in a booth.

Meetings according to some surveyed, are now becoming less formal. A senior workplace designer, based in the UK, reiterating this by mentioning that “companies increasingly only want a small number of beautiful, formal meeting rooms, together with smaller meeting rooms and less formal non-bookable spaces.”

Overall, it seems that meeting room space is mostly available and, when it isn’t, there are good alternatives. As one respondent put it, “we have a lot of conference rooms and smaller meeting rooms. We also have private rooms for between one and four people, but probably not quite the right number as sometimes there is too much demand. I don’t think it impedes productivity as people find other places to meet.”

Meeting spaces

**Which of the following typically happens when you need to host a video/conference call?**

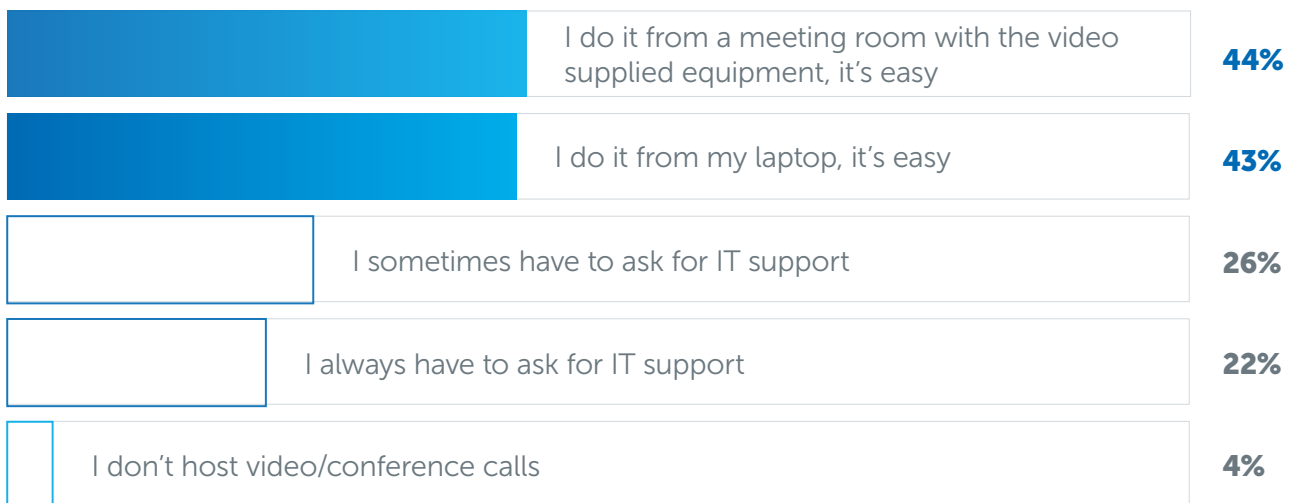


Figure 14. See appendix: Table 26

In today’s environment, video conferences (VCs) are now a staple of everyday working life. Video conferencing technology is increasingly viewed as well-integrated, easy to use, cheap and, in the main, effective. Over two-fifths (44 percent) say they hold VCs in a suitably equipped meeting room, though a fifth (22 percent) say they still have to ask IT for help with VC set up and equipment requirements.

## Keeping connectivity secure

One risk of more employees using company devices outside the office is security. Cyber-attacks are prevalent, and it can be harder for an IT department to control a device that is to some extent a personal one. The risk of a breach is also increased simply by the possibility of losing a device. This makes it imperative to adopt the appropriate security measures, such as by encrypting data.

### Business security

## What security measures do you have in place for people who work remotely?

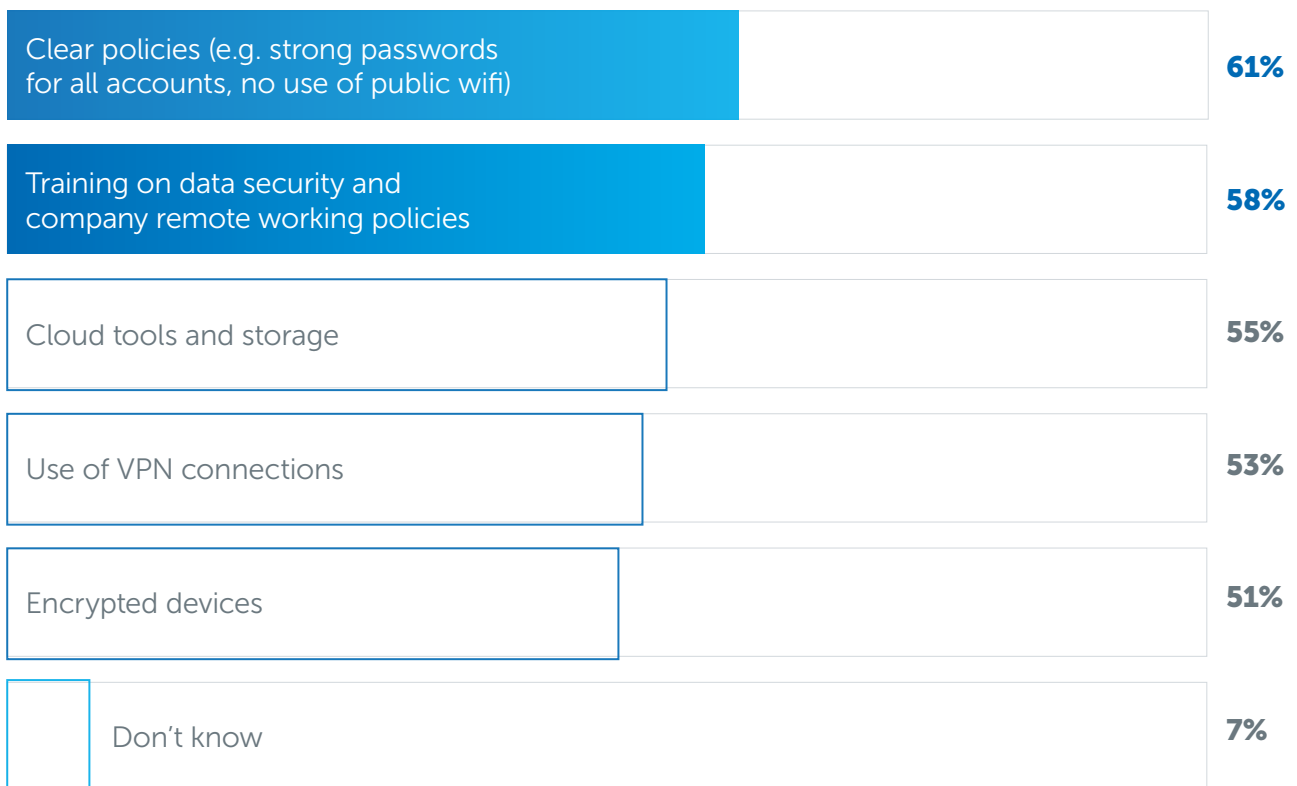


Figure 15. See appendix: Table 5



When it comes to securing remote workers, most businesses rely on policies (61 percent) and training (58 percent); and while there is widespread use of cloud applications (55 percent), this can often mean that data is not stored on a device and virtual private networks (VPNs) are used, which helps to secure internet data against interception, and data encryption (51 percent). The use of policies is significantly less common in France (49 percent) and much more common in Singapore (70 percent).

Almost half of respondents (45 percent) agree that data security measures are not keeping pace with the challenges posed by new ways of working. However, a third of respondents (32 percent) disagree - suggesting that there are considerable differences in how companies deploy security measures.

There is broad agreement at the moment that office technology is becoming ever more connected and seamless. Almost everyone (93 percent) agreed that integration of technologies is important to productivity and a large majority (71 percent) said that workplace technology had improved productivity.

### Workplace technology

## Broadly speaking, how important is integrating new workplace technologies to the productivity of your organization?

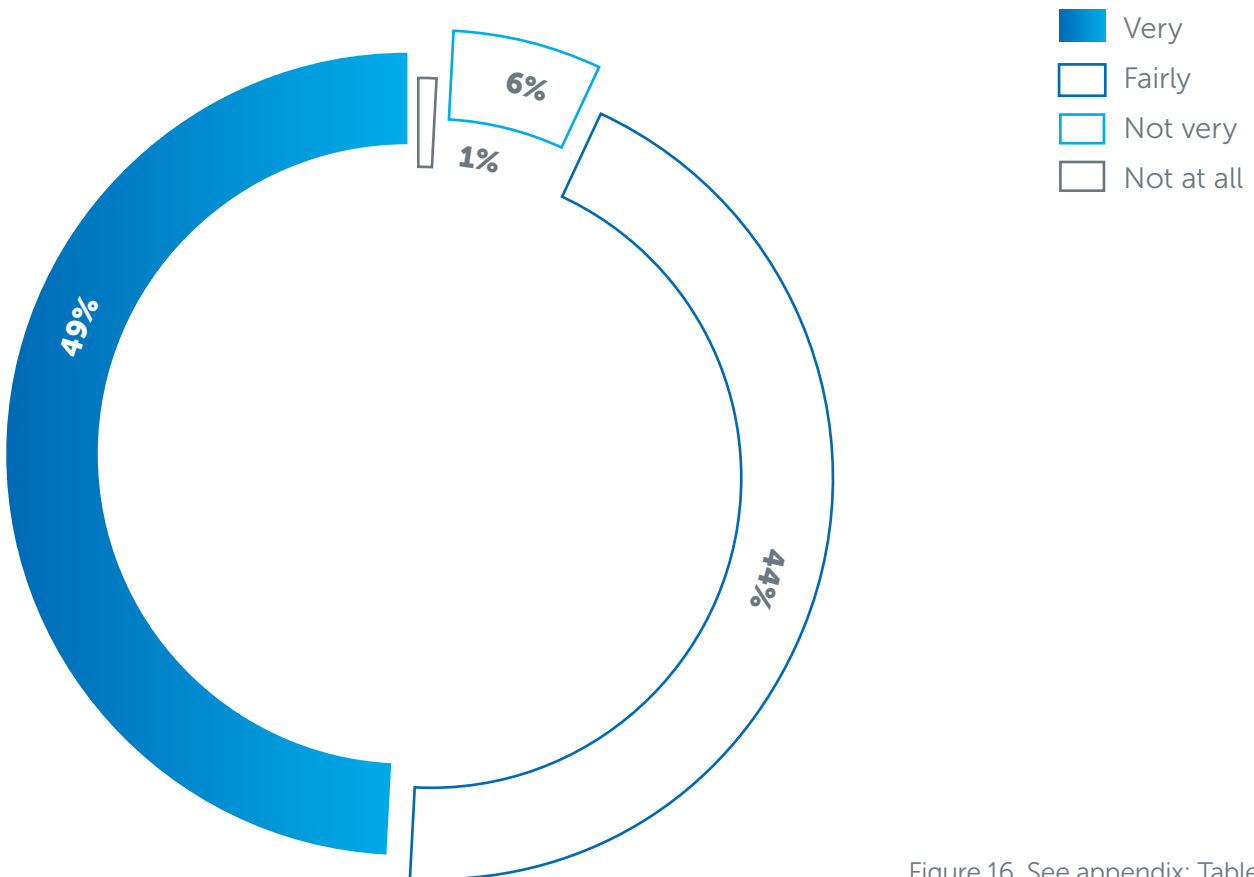



Figure 16. See appendix: Table 17

Not all companies are as technologically forward-thinking. Just 13 percent of the companies surveyed provide a mobile phone to all employees. Only 29 percent say they provide one to 'most' employees; and in an era of flexible working, these companies are seemingly leaving their remote employees cut off - or making it impossible for them to work remotely in the first place.

Modern smartphones are as capable as any other type of computer when it comes to sharing, accessing and making quick changes to documents. Almost two-thirds of companies (62 percent) that issue mobile phones to employees allow them to access collaboration applications. Almost as many (59 percent) allow them to access other work systems, and around half offer access to the intranet (54 percent) and to room and workplace scheduling tools (52 percent). While few people sit down to work for long stretches on a smartphone, they have become vital tools for performing quick tasks in the least disruptive way.



**59% of employees have access to work systems on their phones; 52% can schedule and manage meeting rooms and spaces on their mobiles.**

# 06

## Technology integration.



**The functionality and integration of office technology is widely seen to have a major bearing on employee productivity. So, are employees happy with the technology they have at their disposal at work vs what we know to be more advanced within our home environments? Do those that work from an office have adequate space?**

Providing the right mix of meeting rooms and workspace is a challenge for half of businesses, with 44 percent saying that they expect that challenge to remain in three years' time. There are particular concerns around meeting room management. The most common problem was with people who book a meeting room and then fail to release it when it turns out that they don't need it. The reverse problem - people taking rooms that they haven't booked - was also reported.

Workspace challenges

**What do see as your biggest current workspace challenges?**

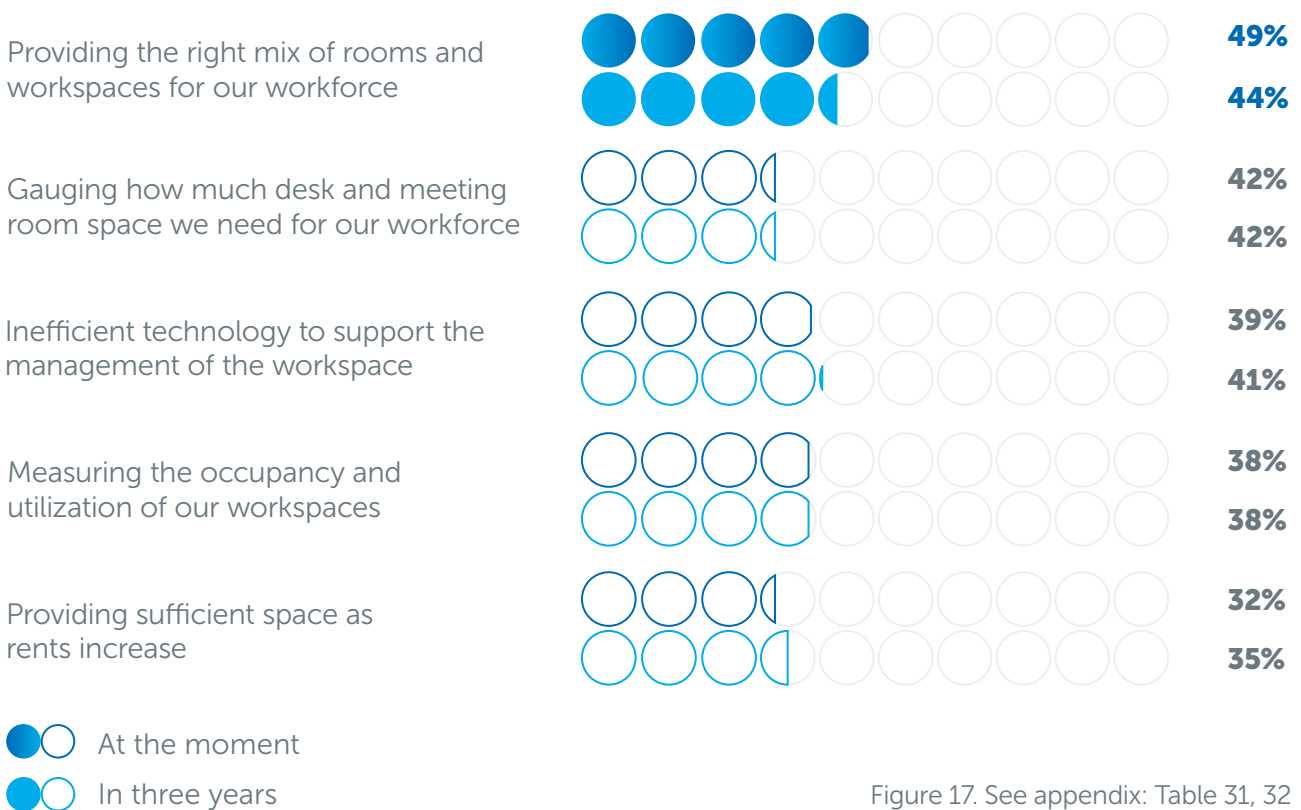


Figure 17. See appendix: Table 31, 32

The problems though, summarized by a facilities manager in The USA, was that while it is working well, the "one frustration is that people tend to jump into rooms to take a call or to go on a hangout and it is then awkward to kick them out." The frustration also lies with people booking meeting rooms bigger than capacity actually demands, and the example being that "people always book rooms for six people when there are only two of them so they could easily find another space."



## Managing space with software

Technology can help to ease these problems, and boost productivity. As mentioned in the previous section, 93 percent of businesses say that integration of technology is important for productivity. A similar amount (94 percent) say technology integration is important for a good employee experience.

Half of companies (50 percent) use meeting room booking software and around a third (36 percent) use workplace booking tools. Companies said that inefficient technology for managing the workplace was the third biggest problem that they had with workplace management and they expected it to remain a problem in three years' time.

The most common booking method for meeting rooms among those surveyed was Microsoft Outlook (48 percent), followed by a specialist meeting booking tool (45 percent). After that came Google's productivity tools (34 percent), a specialist mobile app (31 percent) and door displays (30 percent). Finally, a quarter of companies (24 percent) still rely on asking personal assistances (PA) or receptionists.

Whatever system respondents used to book meetings, they were typically positive about it, though there were some minor examples of friction, mostly to do with technology not being as simple to use as they would like, for example, a C-Suite Executive in the USA noted that they utilize Outlook and Teams integrates into it. Also stating that "it works smoothly, aside from a few early niggles which (they) had to iron out. Also, there are displays outside the meeting rooms so you can see what is available and you can book using the display". The executive also mentioned that they "use Microsoft Teams to book desks in (their) hot desking area and quite a lot of (their) agents work remotely and come into the office intermittently. There are displays so that they can see which desks are available."

Given the frustration of coordinating access to meeting rooms, it is not surprising that more than half of respondents (56 percent) said they are considering workplace or room scheduling tools, while two-fifths (41 percent) are looking at workplace analytics, sensors (40 percent) or internal wayfinding tools (37 percent).

A quarter of companies (24 percent) surveyed say they use sensors in the workplace and 17 percent say they plan to add them in the next few years. Australian firms are particularly likely to adopt sensors, with 30 percent – almost double the global average – saying they will add sensors in the next few years. Meanwhile, two-fifths of respondents (41 percent) say they are considering some form of workplace analytics to give them some sense of how their space is utilized. It is likely that the use of such technology will increase as staff demand for employee-centric experiences increases while costs continue to rise.



**93% agree that the integration of technology is important to productivity.**



# Integrating collaboration tools

This kind of flexibility – hot desking, some colleagues working remotely and others on flexi-time, is only possible because of the increasing evolution and greater adoption of collaboration tools. In fact, two thirds of companies (66 percent) are using wireless technology, which facilitates flexibility inside the office, while almost as many (63 percent) use cloud computing services to facilitate flexibility beyond the office.

Tools such as Slack, Microsoft Teams and Google are powering this change. “We use Slack a lot and we are quite a Google focused company,” a US-based C-Suite Executive said. The executive also noted how most of their employees have laptops over desktops these days, also being able to choose to have personal cell phones or company ones instead if preferred.

Slack and Zoom were again mentioned as first choice for a facilities manager in the USA whose company has offices across the globe and employees that work remotely, all that requiring VC technology. Overall, research indicates that when collaborating, 60 percent of firms use Microsoft Teams while only a quarter (27 percent) are using Zoom, the videoconferencing tool.

## Collaboration tools

### What tools do you use for online meetings and video conferencing?

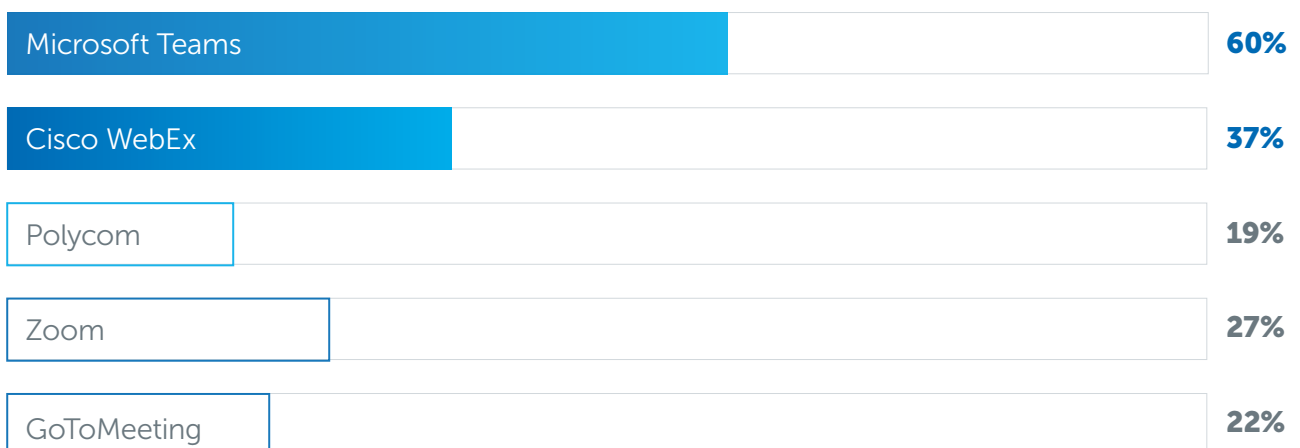



Figure 18. See appendix: Table 23

There are also the environmental benefits of a VC, as it eradicates the need to jump on a flight or drive to meet in person. Almost half of those surveyed (46 percent) say their business is not doing enough to manage its environmental impact, but two-thirds (65 percent) do have an environmental policy in place and many have implemented plans to reduce business travel.

Three-quarters (76 percent) of businesses think that technology is an effective way to cut down on business travel, and VCs clearly have a central role to play in that.

Not only are organizations making extensive use of video calls, but that they expected it to grow in importance. However, it is not expected to completely supplant face to face contact any time soon, as in person meetings are still deemed to be more effective especially when establishing relationships.



**Flexibility, working remotely and flexi-time, is only possible because of the increasing evolution and greater adoption of collaboration tools.**

# Conclusion.

**Flexible and remote working are recurring themes across this research and the underlying forces driving them - rising costs and employee demand - are only going to intensify. Businesses need to account for this in planning their staffing and their workplaces, not only to get the best out of their employees but also to retain them and attract new talent.**

A key theme in the coming year will be to consider how the changing role of employees affects the overall purpose of the workplace. With some employees seldom visiting the office and others working flexible hours, it becomes less important to have a desk for everyone and a very structured environment. The workplace in 2020 is one that acts as a base for collaboration and communication.

Workplaces need to offer a great employee experience. That means enabling work to flow, both between a range of formal and informal environments inside the office that support the nature of the task at hand. Work must flow outside too, as employees work remotely or on the move, which means that technology must enable this to happen efficiently and effectively. As we have seen, many companies are not providing a good mobile experience for their employees - or, in many cases, any mobile experience at all.

The functionality and integration of office technology is widely seen as having a significant influence on employee productivity. Not having the right technology to get the job done or having to switch between multiple incompatible systems is not only inefficient but also bad for employee morale. Employee expectations are now set by consumer technology that prioritizes simplicity and ease-of-use. Workplace technology, whether office-based or mobile, must do the same; and if the research is anything to go by too, in the next three years, business leaders, who agree that the biggest organizational challenge they will face will be digital transformation (see appendix. Table 30), technology will need to facilitate employee expectations and demands to ensure increase levels of collaboration and productivity.

Of course, companies don't have unlimited resources, so they must re-evaluate their workplaces and layouts with an eye on return on investment. Office investments have to deliver productivity, so there is little use in spending money on break-out areas that aren't used because everyone prefers the privacy of a meeting room - or vice versa. Moreover, space in certain regions is expensive, so it isn't necessarily practical to have everyone under one roof. Increasingly, companies are likely to turn this to their advantage by breaking out certain functions, for example innovation labs, into offsite co-working spaces.

Determining the right balance of spaces means understanding your employee needs and your working culture. This can be self-reinforcing because measures that support company culture also help communicate that culture to customers and new employees.

A workplace that supports productivity is important in fostering collaboration, both among workers in the office and with their remote colleagues or customers. It is essential to have spaces that are flexible enough to support these different types of collaboration, between teams small and large, local and remote. Here too, technology has a role to play, with businesses increasingly turning to data analytics to ensure that they are getting the most out of their workspace.

The trend is moving clearly in the direction of more casual, adaptable spaces, that can meet particular needs at the relevant time. Fixed desks are less common and meeting spaces are becoming more informal. However, meeting rooms remain a source of tension, so companies need to plan and manage their resources to ensure staff have the space they need, when they need it.

Many of the tensions seem to arise from people booking meeting rooms that they don't use or booking a larger room than they need. This can hinder productivity and have a detrimental effect on morale, which explains why respondents say their firms are turning to technology to help manage meeting rooms and desk space.

With an increasingly remote workforce, video conferences are taking an ever more important role in the modern office. It also has the advantage of reducing the need to travel, which is a benefit to companies who are trying to reduce their environmental footprint. Businesses still consider face-to-face meetings to be vital for some purposes, such as starting a new client relationship, but video conferencing will grow in importance.

The increase in video conferences, as well as remote and flexible working, is not without problems. Research has shown that many companies are not doing enough to ensure the security of their data and communications. For some, this is a matter of poorly communicated policies, but for others the security measures themselves are lacking. This is likely to be a key theme into 2021 as remote working continues to grow, making damaging security failures more likely. However, this will not be enough to turn people away from remote working. The benefits are too great, for both employees and employers.

One final area where flexibility brings benefits for both businesses and employees is the potential move to a four-day week. This is something that has been tried in some businesses and has often been shown to increase productivity. It also relieves pressure on the costly workplace, while giving employees more time to de-stress and relax. It was viewed very positively by respondents and this could be the beginning of a trend that we see growing in research conducted in 2021 and beyond.

Despite a rapidly changing economic landscape, the workplace remains central to productivity and collaboration. It plays a vital role in employee satisfaction and commitment and is crucial to the efficient functioning of the business. Now, more than ever, businesses should be focused on making their workplaces the best they can be.

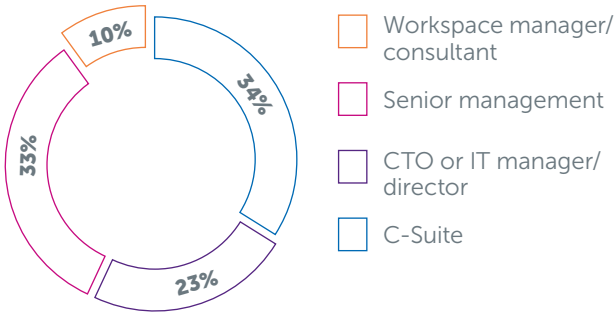
# Appendix.

## Data Demographic

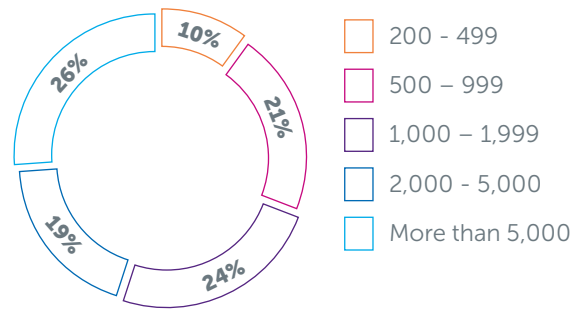
Base: 1,031 online surveys  
(Condeco Software, January 2020)

US	UK	France	Germany	Singapore	Australia
300	184	165	153	105	104

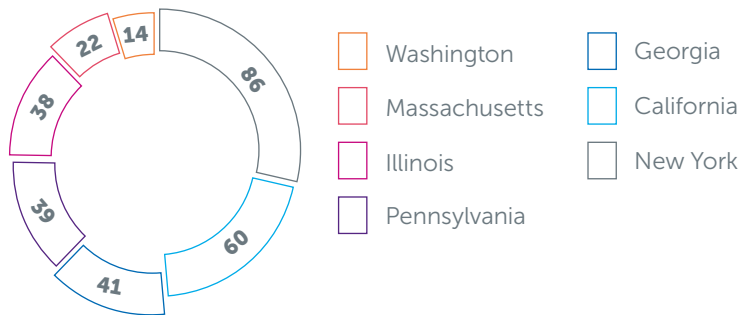
### Job role



### Number of employees



### USA States breakdown



### Company sector

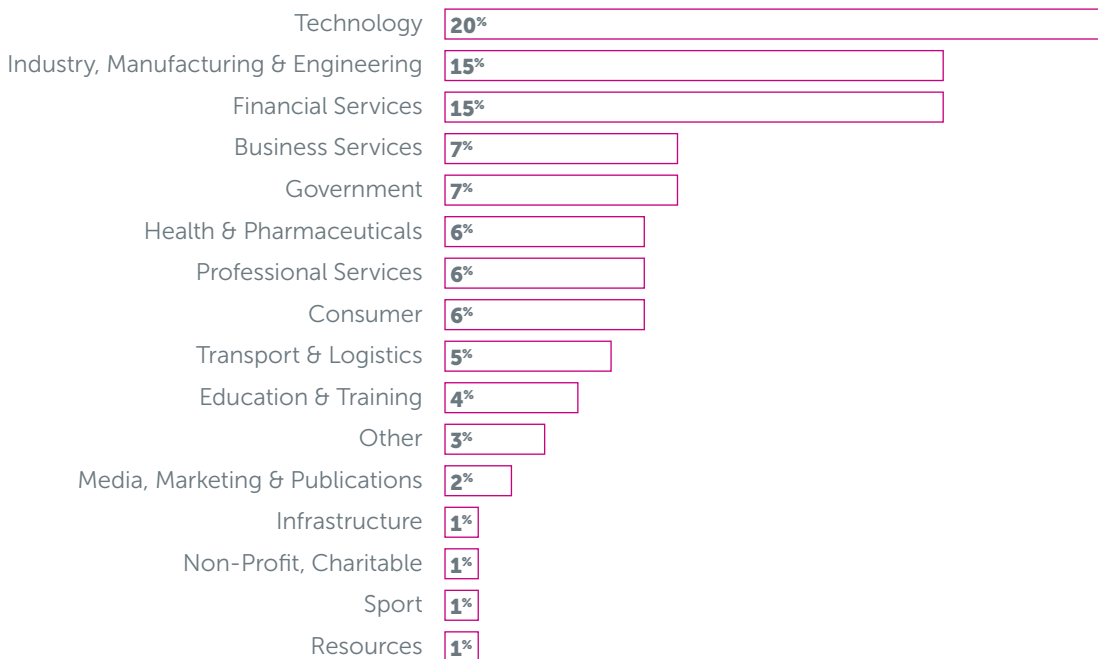




Table 1

**Does your organization offer any of the following to some or all employees? Please select all that apply.**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Flexi-time - employees choose when to start and end their work day, but may have some set core hours when they must work	82%	77%	86%	85%	73%	81%	66%	76%
Remote working – employees can work from home or anywhere else for some or all of their work	65%	58%	57%	50%	61%	68%	63%	62%
Neither of the above	6%	14%	4%	5%	10%	5%	15%	10%

Table 2

**What percentage of your employees work remotely at least some of the time?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Less than 25%	43%	39%	9%	50%	33%	26%	18%	26%
25% – 49%	47%	47%	59%	30%	58%	49%	49%	51%
50% or more	10%	14%	32%	10%	8%	25%	32%	23%
Don't know	0%	0%	0%	10%	2%	0%	1%	0%

Table 3

**Why does your organization offer remote working?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Improve productivity	69%	49%	56%	80%	67%	54%	63%	60%
Improve employee retention	53%	34%	52%	60%	61%	62%	50%	52%
Improve diversity (e.g... to help mothers returning to work)	57%	35%	44%	30%	48%	52%	44%	46%
To reduce office costs	38%	42%	44%	50%	41%	41%	45%	42%
To scale employee numbers more flexibly	44%	33%	44%	40%	50%	41%	39%	41%
It enables employees to get to clients	41%	37%	33%	40%	44%	36%	35%	37%
Employees demand it	41%	56%	37%	30%	28%	26%	33%	36%
To reduce our environmental footprint / impact	29%	35%	32%	40%	39%	44%	28%	34%
Foreign expansion	24%	16%	23%	20%	18%	33%	22%	22%

Table 4

**What is stopping you giving more employees the ability to work remotely?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Face-to-face interaction is lost, and there's no substitute for this	53%	39%	44%	40%	57%	52%	47%	48%
Data protection/security issues	50%	37%	45%	40%	55%	36%	40%	42%
Employees generally prefer to come into the office	40%	33%	41%	30%	37%	38%	42%	39%
We pay for office space so we need to utilize it	33%	24%	42%	40%	38%	39%	36%	35%
Remote workers are generally less productive than their counterparts on-site	38%	29%	29%	35%	45%	35%	28%	32%
Don't know	2%	4%	4%	10%	2%	3%	6%	4%

Table 5

**What security measures do you have in place for people who work remotely?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Clear policies (e.g. strong passwords for all accounts, no use of public WIFI)	67%	49%	65%	60%	70%	61%	60%	61%
Training on data security and company remote working policies	61%	45%	57%	60%	70%	60%	60%	58%
Cloud tools and storage	62%	46%	58%	60%	55%	52%	59%	55%
Use of VPN connections	56%	48%	48%	45%	73%	48%	53%	53%
Encrypted devices	57%	32%	48%	60%	58%	59%	52%	51%
Don't know	6%	8%	2%	5%	3%	6%	13%	7%

Table 6

**Thinking more broadly, how much more or less remote working will there be in your organization in a year's time?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
A lot less	2%	0%	2%	0%	4%	1%	3%	2%
A little less	2%	5%	1%	5%	5%	5%	4%	4%
About the same as now	31%	30%	33%	30%	35%	33%	28%	31%
A little more	49%	46%	47%	40%	37%	44%	42%	44%
A lot more	14%	16%	16%	25%	18%	16%	21%	18%
Don't know	2%	3%	0%	0%	1%	1%	2%	2%

Table 7

**Thinking more broadly, how much more or less remote working will there be in your organization in three years' time?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
A lot less	1%	0%	1%	0%	3%	2%	2%	1%
A little less	5%	3%	4%	0%	2%	3%	2%	3%
About the same as now	22%	30%	15%	5%	21%	30%	20%	23%
A little more	36%	35%	65%	55%	46%	40%	36%	42%
A lot more	33%	26%	15%	35%	27%	25%	37%	28%
Don't know	4%	6%	1%	5%	2%	1%	3%	3%

Table 8

**Generally speaking, do you think remote working employees are more or less productive than their on-site colleagues?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Much less productive	4%	5%	7%	0%	2%	5%	8%	6%
A little less productive	18%	17%	16%	25%	22%	20%	16%	18%
About the same	27%	41%	37%	15%	29%	36%	24%	32%
A little more productive	35%	19%	24%	20%	30%	24%	24%	25%
Much more productive	15%	15%	15%	40%	16%	15%	26%	19%
Don't know	1%	3%	1%	0%	1%	0%	2%	1%

Table 9

**How do you think your organization's overall productivity would be affected if everyone moved to a four day week (with no less pay)?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Decrease a lot	4%	10%	14%	5%	5%	9%	7%	8%
Decrease a little	22%	26%	18%	10%	12%	13%	14%	17%
Make no difference	21%	27%	24%	20%	28%	24%	21%	24%
Increase a little	28%	19%	27%	30%	35%	39%	32%	30%
Increase a lot	24%	14%	14%	30%	19%	13%	25%	19%
Don't know	1%	4%	3%	5%	1%	2%	2%	2%

Table 10

**How do you think overall employee morale would be affected if everyone in your organization moved to a four day week (with no less pay)?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Decrease a lot	3%	2%	6%	0%	1%	2%	4%	3%
Decrease a little	8%	9%	21%	5%	4%	7%	8%	10%
Make no difference	17%	21%	22%	10%	19%	22%	14%	19%
Increase a little	37%	27%	27%	30%	41%	30%	32%	31%
Increase a lot	36%	38%	24%	55%	35%	36%	40%	36%
Don't know	0%	4%	1%	0%	0%	2%	2%	2%

Table 11

**To what extent do you agree or disagree with the following statements about your organization?**

<b>As a business leader I need to discourage business travel because of the impact on the environment</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	2%	5%	10%	10%	3%	4%	11%	7%
Somewhat disagree	19%	0%	8%	15%	8%	11%	20%	12%
Neither agree nor disagree	24%	30%	22%	40%	37%	27%	28%	28%
Somewhat agree	38%	45%	33%	25%	44%	38%	22%	34%
Strongly agree	17%	20%	27%	10%	9%	21%	19%	19%

Table 12

**To what extent do you agree or disagree with the following statements about your organization?**

<b>Technology is an effective solution for cutting down on business travel</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	2%	1%	4%	0%	2%	2%	4%	3%
Somewhat disagree	5%	0%	4%	5%	3%	4%	6%	4%
Neither agree nor disagree	14%	16%	25%	5%	13%	19%	16%	17%
Somewhat agree	44%	51%	29%	45%	54%	43%	36%	41%
Strongly agree	35%	32%	38%	45%	28%	31%	38%	35%

Table 13

**To what extent do you agree or disagree with the following statements about your organization?**

<b>We have a plan in place to reduce the number of flights staff take each year</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	3%	7%	10%	10%	0%	4%	6%	6%
Somewhat disagree	15%	0%	8%	25%	10%	7%	17%	10%
Neither agree nor disagree	22%	25%	23%	30%	38%	35%	26%	28%
Somewhat agree	39%	44%	30%	20%	42%	36%	30%	35%
Strongly agree	20%	24%	29%	15%	10%	17%	20%	20%

Table 14

**To what extent do you agree or disagree with the following statements about your organization?**

<b>My organization has a formal stated environmental policy setting out its commitment to tackling environmental issues</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	2%	2%	5%	10%	1%	3%	6%	4%
Somewhat disagree	15%	0%	5%	15%	10%	13%	13%	10%
Neither agree nor disagree	19%	23%	26%	5%	22%	21%	20%	21%
Somewhat agree	41%	48%	31%	45%	50%	39%	32%	39%
Strongly agree	22%	27%	33%	25%	16%	24%	29%	26%

Table 15

**To what extent do you agree or disagree with the following statements about your organization?**

<b>My organization is not doing enough to manage the environmental impact of its workspaces</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	10%	10%	18%	5%	5%	9%	19%	13%
Somewhat disagree	21%	0%	16%	30%	18%	20%	20%	16%
Neither agree nor disagree	25%	28%	27%	20%	36%	23%	21%	25%
Somewhat agree	28%	50%	17%	35%	31%	30%	28%	31%
Strongly agree	16%	12%	23%	10%	10%	18%	12%	15%

Table 16

**What technologies does your organization currently have in some or all of its workspaces?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Wireless technology	69%	64%	52%	95%	70%	64%	70%	66%
Cloud computing	67%	50%	69%	70%	64%	61%	65%	63%
Specialist meeting room booking solutions (i.e. not MS Outlook)	62%	41%	56%	55%	53%	49%	46%	50%
Specialist desk and workspace booking solutions	42%	20%	18%	30%	51%	43%	44%	36%
Space utilization measurements	36%	34%	30%	25%	37%	33%	43%	36%
Desk sensors	21%	26%	27%	35%	19%	23%	24%	24%

Table 17

**Broadly speaking, how important is integrating new workplace technologies to the overall productivity of your organization?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Not at all important	0%	1%	1%	0%	0%	1%	2%	1%
Not very important	5%	5%	7%	15%	1%	4%	9%	6%
Fairly important	43%	55%	49%	20%	55%	51%	30%	44%
Very important	52%	40%	44%	65%	44%	45%	59%	49%

Table 18

**Broadly speaking, how important is integrating new workplace technologies to the experience you offer employees?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Not at all important	0%	1%	1%	0%	0%	1%	2%	1%
Not very important	4%	4%	5%	5%	5%	5%	4%	5%
Fairly important	49%	61%	54%	25%	47%	55%	37%	49%
Very important	47%	35%	40%	70%	49%	39%	57%	46%

Table 19

**What areas, if any, would you look at integrating with in order to enhance your workspaces? Please select all that apply.**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Video communications *	63%	50%	50%	75%	71%	55%	62%	59%
Workspace and conference room scheduling **	59%	50%	48%	65%	70%	55%	57%	56%
Calendar integration (Outlook, Google)	42%	41%	39%	40%	48%	42%	47%	43%
Workspace Data Analytics	42%	31%	41%	50%	45%	40%	44%	41%
Workspace and meeting room sensors to monitor occupancy and usage	38%	27%	40%	65%	53%	32%	45%	40%
Wayfinding ***	36%	28%	39%	40%	45%	39%	38%	37%
Visitor Management Software	31%	31%	33%	25%	39%	26%	32%	31%
Don't know	5%	8%	4%	0%	1%	3%	4%	4%

\* (Virtual and online video calls using Microsoft Teams, Zoom, Polycom or similar video tools)

\*\* (A dedicated software platform that helps organizations optimize the use of space and resources)

\*\*\* (Information systems that guide people through the workspace and enhance their understanding and experience of it)

Table 20

**Do employees in your organization generally have access to the right types of meeting rooms when they need them?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
All the time	26%	26%	25%	25%	18%	24%	34%	27%
Most of the time	55%	53%	65%	65%	58%	50%	49%	54%
Some of the time	16%	18%	9%	5%	22%	21%	14%	16%
Rarely	3%	2%	1%	5%	2%	3%	3%	2%
Never	0%	1%	0%	0%	0%	1%	1%	1%

Table 21

**When meeting space isn't free, where do you have sensitive/confidential conversations?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
In quiet office spaces	49%	55%	42%	53%	53%	40%	46%	47%
We have to delay these conversations to another time	39%	25%	33%	53%	45%	40%	37%	37%
We tend to go offsite (e.g. nearby café or park)	48%	25%	25%	33%	43%	37%	35%	34%
Public/open plan areas	25%	15%	37%	40%	28%	32%	23%	27%
In restaurant style booths	26%	15%	27%	20%	24%	24%	19%	22%

Table 22

**How do people book meeting rooms in your organization? Please select all that apply.**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Microsoft Outlook	53%	47%	38%	45%	55%	48%	50%	48%
Specialist meeting room scheduling software	45%	46%	50%	40%	47%	42%	42%	45%
Mobile app	27%	28%	36%	25%	40%	27%	31%	31%
Google	37%	32%	31%	45%	30%	27%	40%	34%
A door display or screens showing if or when a room is available	33%	29%	33%	40%	24%	29%	31%	30%
By contacting front of house, PAs or receptionists	23%	18%	24%	40%	24%	24%	28%	24%

Table 23

**What tools do you use for online meetings and video conferencing?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Microsoft Teams	64%	64%	63%	55%	57%	56%	60%	60%
Cisco WebEx	40%	36%	32%	45%	44%	34%	37%	37%
Polycom	19%	15%	20%	30%	29%	16%	19%	19%
Zoom	32%	19%	29%	25%	24%	24%	32%	27%
GoToMeeting	29%	10%	20%	40%	23%	14%	32%	22%

Table 24

**How is your organization planning on improving your workspace utilization in the next few years, if at all?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Introduce a dedicated workspace scheduling solution	42%	44%	44%	35%	59%	37%	44%	44%
Consult employees (e.g. using a workspaces survey) to determine if there is a need for it	40%	44%	50%	45%	52%	44%	49%	47%
Introduce a dedicated meeting room scheduling solution	39%	32%	37%	30%	51%	25%	41%	37%
Employ a team to coordinate and manage office space	42%	27%	41%	60%	37%	33%	45%	39%
Introduce sensors to measure occupancy and usage	30%	13%	16%	30%	18%	11%	17%	17%
Don't know	13%	1%	5%	5%	7%	15%	7%	7%

Table 25

**How do you organize catering, hospitality and services for your meetings?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
An online solution	35%	22%	39%	35%	47%	34%	40%	36%
Our front of house / reception do it	46%	52%	46%	60%	42%	40%	46%	46%
I sort it out myself via email	34%	21%	29%	30%	33%	29%	30%	29%
We don't need these services	11%	11%	6%	35%	16%	10%	27%	16%
We don't have visitors to the office	13%	19%	19%	5%	10%	9%	14%	14%

Table 26

**Which of the following typically happens when you need to host a video/conference call?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
I do it from a meeting room with the video supplied equipment, it's easy	41%	45%	40%	40%	48%	41%	48%	44%
I do it from my laptop, it's easy	47%	40%	47%	40%	48%	38%	43%	43%
I sometimes have to ask for IT support	26%	24%	29%	30%	32%	22%	25%	26%
I always have to ask for IT support	19%	18%	24%	15%	24%	23%	23%	22%
I don't host video/conference calls	7%	8%	3%	0%	0%	5%	4%	4%

Table 27

**Does your organization provide employees with mobile phones, or not?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
To all employees	12%	12%	13%	15%	11%	10%	16%	13%
To most employees	24%	27%	34%	50%	31%	29%	28%	29%
To some employees	47%	55%	37%	25%	25%	42%	33%	39%
To a few employees	13%	0%	12%	10%	12%	14%	10%	10%
We don't offer them	4%	5%	4%	0%	20%	4%	12%	8%
Don't know	0%	1%	0%	0%	0%	0%	0%	0%

Table 28

**Can employees do any of the following using their work mobile phones?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Access work systems (e.g. for transactions, document handling and customer interaction)	52%	51%	61%	75%	70%	59%	62%	59%
Manage and schedule meeting rooms or workspaces	56%	36%	48%	50%	69%	49%	59%	52%
Access apps for collaboration and internal communication (e.g. Yammer, Teams, Slack and Facebook Workplace)	65%	56%	60%	70%	68%	65%	63%	62%
Access the Intranet	62%	48%	53%	65%	51%	55%	54%	54%
None of the above	4%	10%	1%	5%	2%	1%	2%	3%



Table 29

**What do see as your biggest ORGANIZATIONAL challenges at the moment?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Technology adoption	44%	35%	25%	35%	37%	29%	30%	32%
Talent retention and employee experience	37%	22%	30%	20%	41%	31%	35%	32%
Digital transformation	28%	30%	32%	20%	51%	30%	28%	31%
Innovation	19%	29%	28%	25%	33%	21%	25%	26%
Customer service	22%	18%	34%	20%	22%	22%	20%	23%
Regulation and compliance	25%	19%	18%	30%	30%	23%	22%	22%
Talent supply	24%	12%	27%	35%	27%	20%	24%	22%
Uncertainty about the future	24%	15%	16%	40%	23%	28%	21%	21%
Access to capital	19%	12%	23%	20%	21%	20%	21%	19%
Reputation management	14%	8%	18%	20%	18%	21%	16%	16%

Table 30

**What do see as your biggest ORGANIZATIONAL challenges in three years?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Digital transformation	28%	28%	36%	20%	50%	23%	21%	28%
Talent retention and employee experience	23%	19%	29%	10%	27%	31%	30%	27%
Technology adoption	34%	27%	21%	40%	29%	21%	27%	26%
Innovation	20%	27%	22%	30%	19%	17%	22%	22%
Regulation and compliance	13%	18%	24%	30%	16%	25%	19%	20%
Uncertainty about the future	15%	17%	17%	20%	21%	21%	20%	19%
Talent supply	19%	13%	25%	15%	15%	20%	19%	19%
Customer service	19%	21%	25%	10%	7%	14%	14%	16%
Access to capital	16%	16%	14%	20%	10%	15%	14%	14%
Reputation management	13%	15%	18%	5%	6%	14%	14%	13%

Table 31

**What do see as your biggest WORKSPACE challenges at the moment?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Providing the right mix of rooms and workspaces for our workforce	55%	53%	46%	60%	43%	49%	48%	49%
Gauging how much desk and meeting room space we need for our workforce	29%	42%	40%	50%	35%	48%	46%	42%
Inefficient technology to support the management of the workspace	37%	35%	45%	20%	50%	36%	39%	39%
Measuring the occupancy and utilization of our workspaces	41%	39%	34%	35%	40%	35%	38%	38%
Providing sufficient space as rents increase	38%	30%	35%	35%	32%	30%	29%	32%

Table 32

**What do see as your biggest WORKSPACE challenges in three years?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Providing the right mix of rooms and workspaces for our workforce	45%	49%	40%	50%	37%	41%	47%	44%
Gauging how much desk and meeting room space we need for our workforce	41%	36%	46%	50%	41%	46%	42%	42%
Measuring the occupancy and utilization of our workspaces	35%	42%	41%	35%	37%	43%	42%	41%
Inefficient technology to support the management of the workspace	41%	35%	39%	40%	47%	37%	35%	38%
Providing sufficient space as rents increase	38%	38%	34%	25%	38%	33%	33%	35%

Table 33

**Which of the following applies to your organization?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
We provide shared and flexible workspace areas within our offices	60%	47%	47%	55%	57%	55%	58%	54%
We have created additional co-working spaces outside of our normal office environment	38%	44%	50%	50%	55%	40%	46%	46%
We have rented additional co-working spaces (for example, WeWork or similar)	25%	30%	32%	30%	32%	32%	39%	33%
None of the above	10%	20%	19%	15%	6%	9%	11%	13%

Table 34

**Why has your organization created additional co-working spaces outside of its normal office environment?**

	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Convenient for employees (e.g. a central location or somewhere that is easy to get to)	92%	56%	54%	47%	74%	57%	58%	61%
Increase productivity	55%	46%	49%	47%	69%	47%	57%	54%
Cost effectiveness	62%	40%	43%	47%	68%	39%	50%	49%
Employees like the co-working atmosphere and environment	62%	41%	54%	104%	64%	47%	55%	54%
Foster collaboration	51%	49%	51%	28%	49%	36%	37%	43%
Don't know	0%	4%	1%	0%	0%	3%	0%	1%

Table 35

**To what extent do you agree or disagree with the following statements about your organization?**

<b>Rising rents and office costs are a growing financial challenge</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	6%	7%	5%	0%	2%	5%	10%	6%
Somewhat disagree	11%	0%	7%	10%	6%	11%	12%	8%
Neither agree nor disagree	15%	29%	31%	10%	16%	28%	21%	24%
Somewhat agree	44%	47%	28%	60%	50%	35%	37%	40%
Strongly agree	24%	16%	29%	20%	27%	21%	20%	22%

Table 36

**To what extent do you agree or disagree with the following statements about your organization?**

<b>Our data security is not keeping up with new challenges caused by our evolving ways of working</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	12%	15%	18%	15%	6%	16%	16%	15%
Somewhat disagree	21%	0%	15%	25%	26%	19%	23%	17%
Neither agree nor disagree	28%	23%	22%	0%	23%	28%	19%	22%
Somewhat agree	27%	46%	27%	40%	35%	25%	26%	30%
Strongly agree	13%	16%	18%	20%	10%	13%	17%	15%

Table 37

**To what extent do you agree or disagree with the following statements about your organization?**

<b>Our offices do not provide the right mix of spaces and meeting rooms for employees to work productively</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	12%	16%	14%	10%	8%	9%	19%	14%
Somewhat disagree	25%	0%	11%	35%	19%	19%	22%	17%
Neither agree nor disagree	21%	25%	26%	10%	28%	29%	19%	24%
Somewhat agree	32%	47%	27%	25%	39%	29%	24%	31%
Strongly agree	11%	12%	21%	20%	7%	14%	17%	14%

Table 38

To what extent do you agree or disagree with the following statements about your organization?

<b>Our employees still have an assigned desk but can choose to work in different places</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	5%	8%	8%	0%	4%	3%	9%	7%
Somewhat disagree	9%	0%	8%	5%	10%	11%	13%	9%
Neither agree nor disagree	23%	23%	27%	15%	24%	25%	13%	21%
Somewhat agree	41%	50%	29%	50%	49%	43%	36%	41%
Strongly agree	22%	19%	27%	30%	13%	18%	28%	23%

Table 39

To what extent do you agree or disagree with the following statements about your organization?

<b>Our employees are more productive when they have access to a range of spaces supporting different working styles</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	1%	4%	2%	0%	0%	1%	4%	2%
Somewhat disagree	9%	0%	6%	10%	2%	8%	5%	5%
Neither agree nor disagree	20%	23%	29%	10%	21%	28%	16%	22%
Somewhat agree	40%	48%	33%	45%	57%	45%	42%	44%
Strongly agree	30%	25%	31%	35%	20%	19%	32%	27%

Table 40

To what extent do you agree or disagree with the following statements about your organization?

<b>Changes in the design of our workspaces have significantly improved our productivity in recent years</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	1%	4%	7%	0%	1%	3%	3%	3%
Somewhat disagree	7%	0%	5%	5%	8%	7%	7%	6%
Neither agree nor disagree	26%	24%	20%	15%	11%	31%	23%	23%
Somewhat agree	53%	53%	39%	50%	58%	40%	40%	45%
Strongly agree	13%	19%	29%	30%	22%	18%	27%	23%

Table 41

To what extent do you agree or disagree with the following statements about your organization?

<b>Changes in our workspace technology have significantly improved our productivity in recent years</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	1%	2%	3%	0%	1%	3%	2%	2%
Somewhat disagree	4%	0%	6%	10%	5%	11%	6%	6%
Neither agree nor disagree	28%	21%	26%	10%	18%	26%	17%	22%
Somewhat agree	42%	50%	35%	50%	57%	40%	41%	43%
Strongly agree	25%	27%	31%	30%	19%	20%	34%	27%

Table 42

To what extent do you agree or disagree with the following statements about your organization?

<b>Given that real estate is one of our biggest costs we do not do enough to measure the ROI of our workspace investments</b>	Australia	France	Germany	Ireland	Singapore	UK	USA	Total
Strongly disagree	5%	14%	8%	0%	3%	5%	9%	8%
Somewhat disagree	18%	0%	12%	5%	11%	13%	14%	11%
Neither agree nor disagree	32%	33%	28%	30%	25%	28%	29%	29%
Somewhat agree	37%	38%	29%	25%	50%	38%	27%	34%
Strongly agree	9%	15%	22%	40%	11%	17%	21%	18%

We're the global leader in workspace management.  
We make it easy to book space to meet up and work together.  
We provide workspace scheduling to over 1,000 of the world's leading companies, integrating meeting room and workspace reservation solutions that help remove friction in the workspace and free businesses and their people up to get the most out of their working day.

Together,  
**we can liberate  
your workspace.**

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