

The Office of the Future

Findings from PlanRadar's research
into Buildings of the Future

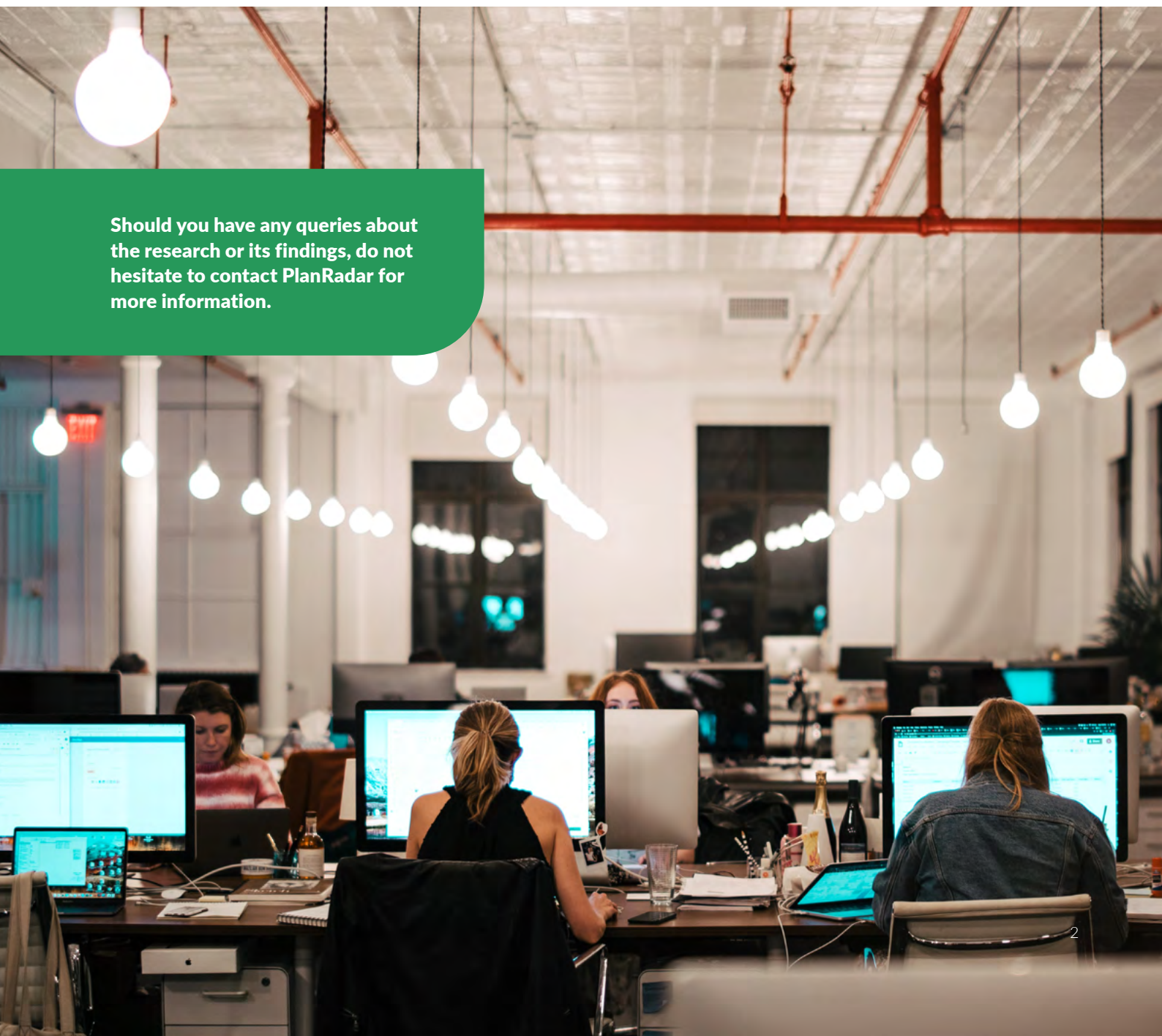
Ebook

Executive Summary

Our notions of what offices look like, who works in them and how offices have continually evolved. However, the COVID-19 pandemic accelerated many changes that were already underway while introducing new ways of working overnight.

This eBook draws on findings from PlanRadar's Buildings of the Future research project, with a focus on experts views for the future of office spaces in particular.

Whether you manage offices, design their interiors, or build them, this eBook will provide you with valuable insights into how these spaces are likely to change in the coming years. You will learn about workplace trends in different countries, emerging office design concepts, and find out about unique approaches that professionals in different countries are prioritising.



Should you have any queries about the research or its findings, do not hesitate to contact PlanRadar for more information.

Key findings at a glance

18.2 m² average office space allocated to US employees

2m² minimum permitted office space per employee in Poland and Italy

Spain is the only country to predict a decline in remote/hybrid work

UK Brits love coworking spaces; the country is home to 6075 of them

92% of countries expect flexible spaces to be a common feature of offices

58% of countries expect collaboration-focused office design to increase

50% of countries say 'biophilic' design is here to stay





How do experts think the office will change?

Depending on who you ask, offices have existed since the time of the Roman Empire, in mediaeval monasteries, and around the courts of royalty. But it is generally agreed that they began to take on their present form in the 1700s, as the world industrialised and the need for bureaucratic and administrative work expanded.

The nature and layout of offices has always evolved, yet the 2020-2022 COVID-19 pandemic and its aftermath has undeniably been a watershed moment. As anyone who works in an office knows, the pandemic radically accelerated the pre-existing trend towards remote or hybrid working, and introduced new ideas about the purpose of the office, and its optimal design.

This eBook does not aim to describe well-established changes that have been documented in great depth elsewhere. Instead, our goal is to compare and contrast what architecture, design and office

management experts foresee for the future of the office in different countries. This report explores how experts in 12 countries think offices in their nations will evolve in the coming decade.

In recent years, globalisation and the ever-deeper integration of economies and working practises led many to assume that offices - and the kind of work people do in them - would become ever more homogeneous. There is certainly some truth to this idea, yet distinct cultural differences always remained and, as our research shows, people's expectations for the future of offices are anything but universal.

The greatest benefit of this comparative research is that it can help us learn from others and seek inspiration for different ways of working. By compiling data, trends and predictions about how offices will evolve around the world, we hope to share new ideas, strategies and methods for dealing with the post-COVID world.

A note on the methodology

PlanRadar's team researched 12 countries in which the company is active, across Europe, North America and the Middle East (specifically: the 🇺🇸 US, 🇬🇧 UK, 🇩🇪 Germany, 🇦🇹 Austria, 🇫🇷 France, 🇪🇸 Spain, 🇮🇹 Italy, 🇸🇰 Slovakia, 🇨🇪 Czechia, 🇭🇺 Hungary, 🇵🇱 Poland and the 🇦🇪 UAE). There is a Euro-centric bias in the countries selected, since this is where we have the most resources in terms of languages.

We selected sources based on the following criteria:

- 1.** From a government-led or government-sponsored report, project, or legal requirements.
- 2.** From a report made by the Association or Chamber of Architects within this country (e.g. RIBA in the UK). If there is a professional association of Urban Planners, Civil Engineers, Designers, Interior Designers or Furniture Makers, these are also potential sources for certain relevant questions.
- 3.** Or from articles published within a journal or magazine owned by the Association or Chamber of Architects (e.g. RIBA Journal for the UK). As in 1. above, for certain questions the magazines or journals of other professional bodies are also acceptable sources.
- 4.** Be as recent as possible, but date from no earlier than June 2020, so that we exclude pre-pandemic predictions. Government regulations can pre-date the pandemic, but must still be current. Sources should specifically refer to an individual country, not to global trends.
- 5.** Where no answers were available from relevant industry bodies or their publications, other 3rd party sources were used. These occurrences have been clearly marked in the full list of sources.

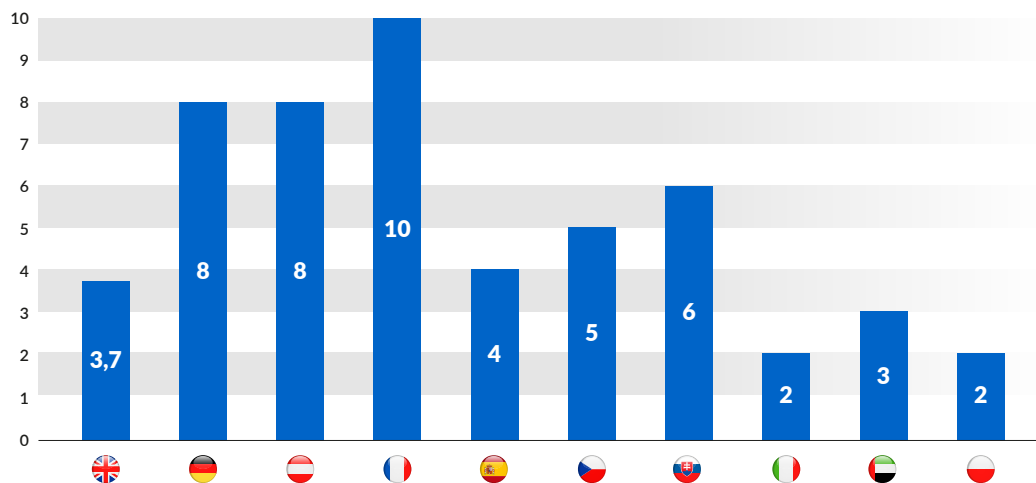
**You can access
a full list of
sources here.**

Insights into the Office of the Future

To understand the significance of any future predictions for the office in different countries, we first needed to understand the status quo. Our analysis therefore begins with an overview of pre-pandemic office norms, before exploring trends in office layout and remote working. Finally, we explore some of the key office design trends emerging around the world.

Who started with the largest office space?

Minimum amount of floorspace required or advised per worker (m²)



One of the most noticeable findings from our research is that the United States allocates far more office space per employee than anywhere else. Even before the pandemic, the average size of office space per employee was **13.9m²** (though this had decreased since the year 2000). In the aftermath of the pandemic, however, American office space has increased again to **18.2m²**, on average.

However, while the United States appears to allocate most office space per employee, it also currently has no national legal minimum. So, although most American office workers enjoy a large amount of space, they are not always protected in the same way as their counterparts in Europe. In northern and Western Europe, workers benefit from legally enforced minimum square meterage. German and Austrian office workers are guaranteed 8m², rising to 10m² in France. Meanwhile, in the UAE, workers must have at least 3m² to do their jobs.

Countries like the UK, Slovakia and Spain take a different approach. Office workers can count on 12m³ in Slovakia, 11 m³ in the UK and 10m³ in Spain. These countries' workers get less guaranteed floor space, but this is compensated for by minimum ceiling heights.

Turning to southern and eastern Europe, minimum floor space for offices range from 5m² in Czechia, and just 2m² in Poland and Italy. That being said, regardless of the local minimum requirement, workers in EU nations are protected by EU occupational safety and health directives. These require office spaces to give workers enough space that their freedom of movement is not impaired and that they can safely carry out their work.

In practice, therefore, the average office space per person might be larger than the required 2 or 3m², but these minimums still reveal some truths about past attitudes towards working environments.

Are office spaces trending larger or smaller?

In the aftermath of the pandemic, many commentators predicted that office workers would demand social distancing as a permanent feature of the office. We wanted to find out if countries are seeing an increase in office space per employee.

As of June 2022, there is not yet enough data to confidently assert a global trend towards giving employees more office space. As noted in the previous section, American employers do appear to be giving staff more room, with space per employee rising from 13.9m² before the pandemic to 18.2m² today. In many other countries (UK, Spain, Slovakia) there appears to have been no permanent change in space per employee.

Meanwhile, in France and Germany, a decline in office space per worker may in fact occur, but for different reasons. German employees may experience less space at work due to the growing number of office-based jobs there – by the end of the decade, almost 200,000 more people are predicted to work in offices compared to 2019. In France, meanwhile, the growth of flexi desk strategies means that employees will have less office space to themselves compared to the past (bear in mind, however, that the French still have the highest minimum legal floor space).

These findings of course come with a caveat that it is still relatively early and not all countries have published data about the long-term impact of the pandemic on working trends yet.

Predicted trend of workspace allocated per worker

Increase



Flat

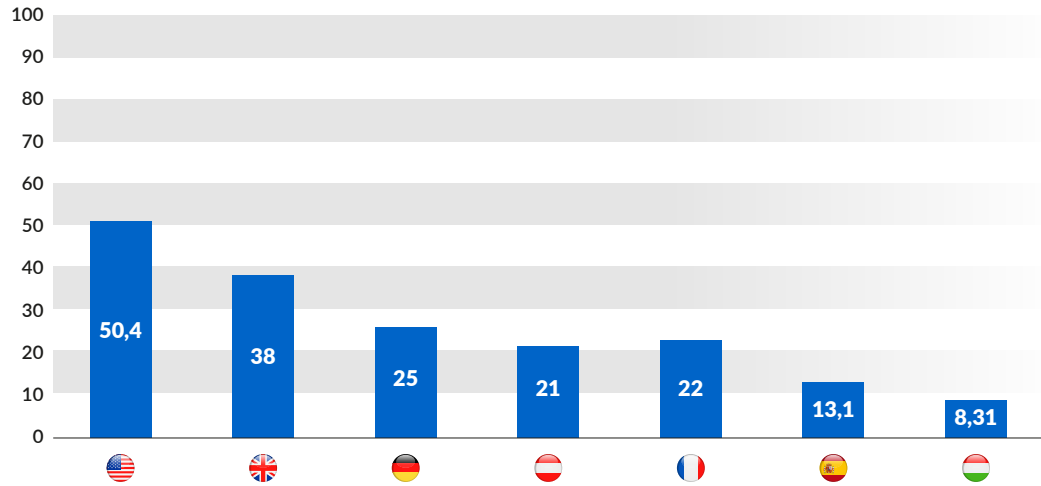


Decline



Which countries are most keen on remote or hybrid working?

Current percentage of people working remotely all or some of the time



The emergence of remote or hybrid working is without a doubt one of the biggest changes that the pandemic has wrought on people's working lives. Data on the percentage of the population working remotely is not yet available for all countries. That being said, we calculate that, for the six countries where comparable data is available, 22.98% of all employees now work remotely all or some of the time. Of the desk-based workforce, the proportion is far higher.

For example, in the US, 58% of workers report that they can work from home on at least 1 day per week. Of that population, 87% take advantage of this opportunity at least sometimes. Therefore more than 50% of the workforce is integrating flexibility in their working location.

There are, however, significant variations here. In certain countries (Germany, France and Austria) over 20% of employees work remotely all or some of the time. The UK and Spain are somewhere in the middle, with about 14% of British employees and 13.1% of Spanish employees working from home all the time. 24% of Brits have a 'hybrid' agreement – working at home a couple of days per week, and the rest at the office. In the UK, therefore, 38% of the workforce are working remotely all or some of the time.

In central and Eastern Europe there's less taste for remote working. Some 8.3% of Hungarian employees work from home all or some of the time, and just 7% of Polish staff work exclusively from home.





One of the most striking findings from the survey is that only one country – Spain - predicts a reduction in remote working in future. All other countries expect fully remote and hybrid working to increase.

Predicted trend of remote and hybrid work



There are several plausible reasons for these variations, including:

The structure of countries' economies:

Most jobs that can be done remotely are in the service sector. In countries that have a higher proportion of people working in industries such as agriculture, manufacturing or retail, there will be fewer remote workers.

Geography:

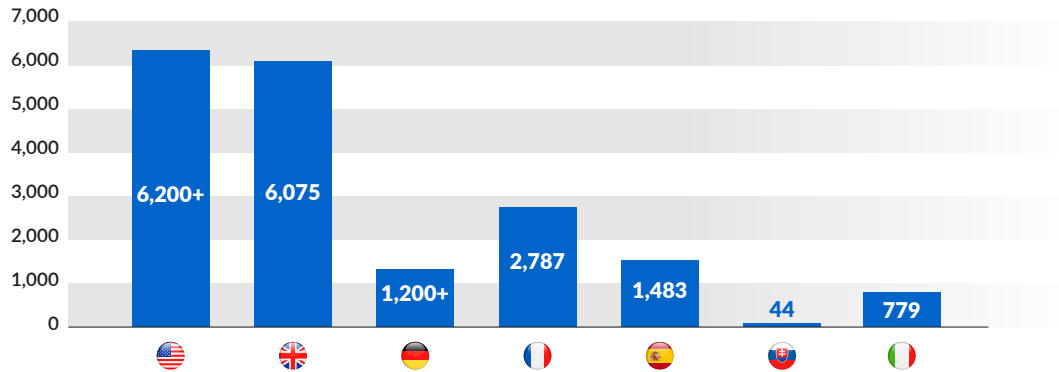
In countries with geographically large footprints, commuting takes more time. It is perhaps unsurprising that the United States has the largest proportion of workers working remotely or in a hybrid model.

Technology penetration:

All countries in our survey are highly economically developed and most will have high levels of broadband internet access, which is of course vital for remote working. Nevertheless, that may be some differences in access to and quality of the technology in some countries which makes remote working harder.

Coworking: how do countries view it?

Number of co-working spaces



Over the past decade, the emergence of dedicated ‘co-working’ spaces has seriously disrupted the serviced offices sector. This best-known brand to promote this concept, WeWork, is present in cities around the globe. Its success with leasing space in attractively designed buildings to freelancers, start-ups and established businesses has been replicated by countless other firms.

While all countries in the study have introduced coworking spaces in some form or another, their location, popularity and nature varies dramatically.

The UK appears to have a particular taste for this approach to offices. The country has some 6,075 flexible and coworking spaces, with 103.5 million square feet dedicated to them in 2020 (expected to rise to 167 million square foot in 2023). The US does have slightly more – with 6,200 coworking spaces there in 2022. However, the US population is almost five times larger than that of the UK. Western Europe in general has an affinity for coworking spaces – Germany had 1,200 in 2020, while in 2021 France had 2,787 and Spain had 1,483.

There are, however, differences between these countries. In Britain, most growth in coworking spaces is currently happening in suburbs and smaller cities (the demand in major conurbations is presumably now saturated). The majority of Spain and France’s coworking spaces are located in the big cities (Barcelona and Madrid, and Paris respectively). Conversely, the trend in Germany is for coworking spaces to pop up in rural areas. Italy, perhaps surprisingly, bucks the trend. In 2021 it only had 779 coworking spaces, although that number is also rising.

In Eastern Europe, the number of coworking spaces is considerably lower (there are 44 in Slovakia, for instance), and solid data on the number of spaces is not as available. Our analysis did, however, note that the growth in these kinds of spaces is fast in that region. Numbers of Polish coworking spaces are growing quickly, with the total multiplying almost six times in just six years.

Coworking spaces aren’t popular everywhere, however. In 2020, Hungary saw a decline in these kinds of offices, while the UAE has just 1.74 coworking spaces per 100,000 people (in a population of ~10 million).





Co-working spaces solve many problems and can work hand-in-hand with a flexible remote work policy. Their proponents claim the following key benefits, among others:

Reduced costs for smaller firms:

Offices carry many additional costs, from internet connections to facility management services or coffee and snacks for workers. Coworking spaces often include these items in their packages, making them a cost-effective choice for smaller firms that don't want to run their own facility. They can also be an effective way to launch smaller regional offices.

Flexible access to space:

If a business is successfully running a hybrid working model for their employees, then co-working spaces can be a resource for workers who need a professional meeting room or temporary space to focus outside their home.






















































Collaboration:

Co-working spaces can offer diverse opportunities for collaboration, with people from different companies and industries mingling in the same common areas.

What are the biggest office design trends?

What trends are architects, engineers and designers seeing in different countries? We analysed the data to find what features are likely to become the norm in offices around the world.

What are predicted workplace design trends?

Flexible spaces	          11
Collaboration increase	       7
Biophilic design/ plant-based elements	      6
Sustainability	      6
Balance between natural and artificial lighting	      6
WELL certification and wellness	    5
Open plan workspaces	    4
Flexible office furniture for different uses	    4
Hybrid working	   3
More health & safety measures/ventilation	   3

Collaboration increases

On a similar note, seven of the 12 countries (US, UK, Germany, France, Slovakia, Hungary, Italy) report an expansion in collaborative space in the office. People will need more room for face-to-face meetings, ideation and creativity. That means more space should be set aside for such meetings.

Flexible spaces

In all countries (except Spain) experts predict a rise in flexible office space. Flexible office spaces allow employees and office managers to quickly move desks, partitions, equipment and furniture to meet changing needs. This is particularly valued in the post-pandemic world where people are doing different kinds of work at the office. Where once the office was the place for all tasks, many now prefer to do ‘focus work’ at home, and collaborative work when they travel to company premises. This means more discussion, movement and adjustment of the floor plan.

Sustainability

Experts in half the countries (Germany, France, Spain, Hungary, Italy, Poland) point to sustainability as a key feature of future offices. Workplaces consume large amounts of energy, and so employees, customers and even board members are pushing firms to make their offices more ecologically sound.

Biophilic design

Biophilic design refers to the extensive use of plants and other natural elements throughout the office (interior and exterior). Many studies have been conducted to evaluate the impact of plants on productivity and positive experiences in a workspace, generally concluding that plants increase workplace satisfaction and that there is an additional productivity benefit when compared to “lean office” design.¹ Experts in half of the countries surveyed – UK, Germany, France, Czechia, Slovakia and the UAE – say this will be a priority for their offices in future.

¹ Nieuwenhuis, M., Knight, C., Postmes, T., & Haslam, S. A. (2014). The relative benefits of green versus lean office space: Three field experiments. *Journal of Experimental Psychology: Applied*, 20(3), 199–214. <https://doi.org/10.1037/xap0000024>

Balancing natural and artificial light

Exposure to natural light has all manner of benefits to employees – from improved productivity to reduced stress and better sleep. Experts in half of the countries surveyed (UK, France, Spain, Czechia, Slovakia, UAE) say usage of natural light will be more common in future.

WELL certification

Many office designers now recognise that the workplace can contribute to people's general wellbeing. From air and water purity, through to exercise areas and places to relax, five of the 12 countries are introducing wellness standards (US, UK, Austria, France, Poland).

Unique and idiosyncratic office design trends

Our research not only highlights common trends, but it also reinforces how different countries have their own, often unique, priorities.

According to our research, the UK demonstrates greatest interest in innovative design, signing up to 13 out of a possible 27 trends. Germans and French (nine apiece) are also open to innovation, as are Italians and Slovaks (eight each). The US and Hungary, by contrast, only identified four new trends they expected to appear in their offices.

In terms of unique national trends, there were several interesting differences between countries:

- The USA is the only country considering employee-designed spaces
- The British are the only country to believe future offices will have fewer canteens/cafeterias
- UK offices seem to be very commercially minded too. They're the only places to introduce 'resimercial' developments (combining residential and commercial units), and it's also the only country where renting out office space on demand is seen as a trend – surely linked to the country's taste for flexible working.
- Bucking recent global trends, Czechia and Slovakia share an interest in offices with more partitions and dividers – whereas most other countries appear to believe open plan is here to stay (and the UAE and Spain plan to reduce the number of cubicles at work).
- Polish and French workers in particular can look forward more comfortable workplaces, with greater investment in ergonomic furniture and surroundings

The research also reveals a general trend towards health – that of the employees and of the environment. While increased natural light, biophilic design and WELL certification will ensure that employees' physical and mental health is supported, sustainability and increased interest in plant life and water quality will support general environmental efforts.



A changing office

While the nature and purpose of the office has always been in flux, our research into experts' assessments of the future of the office shows just how dynamic the idea of the office is today.

Our data highlights a number of universal trends, including the persistence of remote work, the growth in coworking, and a taste for flexible and collaborative office environments. Nevertheless, there are plenty of examples of countries that buck these trends. Spain is seeing remote work decline, while the number of coworking spaces in Hungary is shrinking. There are several common threads in office design (biophilic design or more natural light, for instance), but there are also numerous idiosyncrasies too.

Office planners, architects and designers can use these findings to predict and understand what is important to their customers and end users when designing offices of the future. There's no doubt we will be seeing more collaborative environments, places with greater use of natural light, and well managed coworking spaces. But assuming everyone is the same, or wants the same thing, would be unwise. As we discovered, Czechs and Slovaks want more partitions and privacy in their offices, while Spaniards want more open plan and less remote work. Some countries, such as the UK want more outdoor space, while others want more plants indoors.

Being sensitive to these different and varying needs will allow designers to meet requirements and enter new markets successfully, designing offices that are future ready, yet also appropriate to different cultural settings.





About PlanRadar

PlanRadar is an award-winning, digital SaaS field management platform for documentation, task management and communication in construction and real estate projects. We operate in over 60 markets around the world.

PlanRadar digitises all daily processes and communication across real estate and construction. The platform connects all project stakeholders and provides real-time access to valuable project data, enabling teams to increase quality, cut costs and realise work faster.

The easy-to-use platform adds value to every person involved in a building's lifecycle, from contractors and engineers to property managers and owners, with flexible capabilities for all company sizes and processes.

Today, over 100,000 professionals are using PlanRadar to track, connect and solve issues on- and off-site. PlanRadar is currently available in 19 languages, and can be used across all iOS, Windows and Android devices.

Headquartered in Vienna, Austria, PlanRadar has offices across the globe.

If you want to learn more about PlanRadar, get in touch today.

