

Tork office trend report 2016

The office of tomorrow –
intelligent, conscious and flexible



6 experts
17 city regions
8,000 office workers

4/10

say they encounter empty
soap and paper dispensers
and restrooms that haven't
been properly cleaned

65%

agree that the office space
design has an impact on
the atmosphere between
co-workers

56%

believe they are more
hygienic than most people
in their office





Introduction

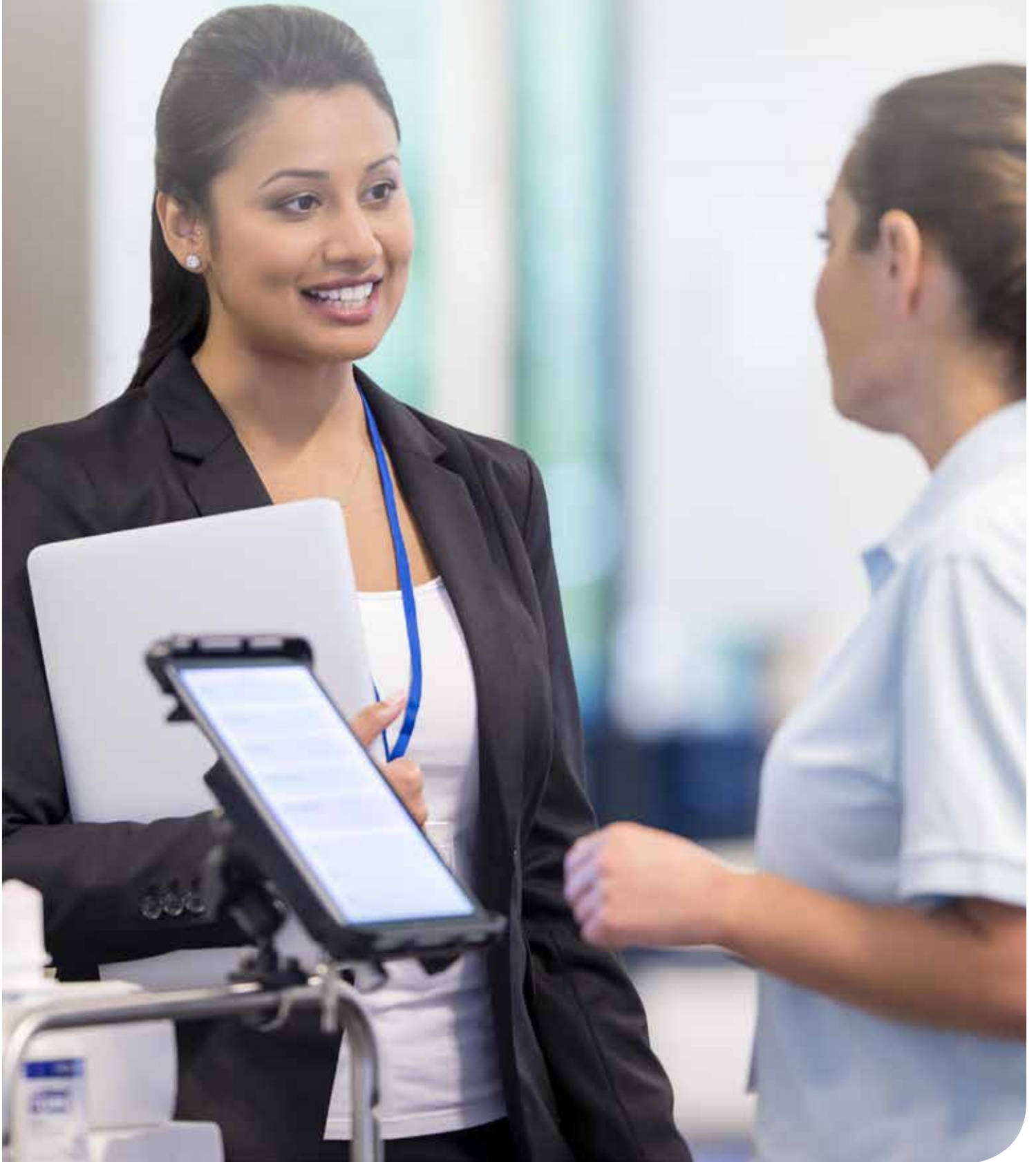
New ideas and attitudes are evolving office spaces and ways of working. In order for Tork to not only understand our clients' needs, but also their clients' needs, we have produced the Tork Office Trend report. The report is based on a survey of 8,000 office workers in major cities around the globe, and a deep interview series with six experts in the office hygiene space, and is the latest effort in our constant endeavor to understand the world in which Tork exists.

From cubicles to activity-based interiors, offices have undergone, and are undergoing, a constant development. Understanding where that journey is headed will be key to be able to provide solutions that are relevant in tomorrow's offices.

In this report we describe three major trends that have been identified through our study: the "hygientelligent" office, the conscious office, and the flexible office. We sincerely believe that these trends mean major possibilities for facility management and office service providers alike, and hope that our analysis can inform how to take advantage of the opportunities that lie ahead.

Happy reading!

The “hygientelligent” office



With more smart connected objects entering the workplace, office employees are also open to connecting devices related to hygiene. We are on the verge of major advances as companies become smarter about gathering and acting on office data.

What will happen when the things in our office go online and start talking to each other?

The internet of things is entering the workplace with more objects connected than just your laptop, smartphone and printer. We are on the verge of a breakthrough of this kind of technology.

“In many offices today, there is still very little data to base decisions on” says Linda Ekener Mägi, who works with strategic business development at global ICT company Ericsson, “most companies still use quite Stone Age methods, such as walking around and counting to see how many employees are sitting at their desks. Cars have had a lot of sensors and data collection for a long time; offices will be moving in this direction as well.”

A connected office environment creates a flow of information allowing management and service providers to gain concrete knowledge about how offices are used, information that can be analyzed to create solutions for a cleaner and more efficient workplace.

From data to decisions

“When it comes to improving the office environment through connected devices, hygiene is a key aspect” says Tony Löff at H&M, who is developing the clothing giant’s global facility management concept, “there will be complaints straight away if core hygiene isn’t maintained.”

Survey results confirm the importance of hygiene: on average 79% of respondents from New York to Shanghai say they would inform their office managers or facility manager if they aren’t satisfied with the quality of hygiene products, and around 40% of all office workers occasionally find paper and soap dispensers empty and washrooms that haven’t been properly cleaned.

Connectivity in the office is already starting to allow service providers to eliminate these kinds of issues. Intelligent dispensers in washrooms can send push-notifications when they are running out of soap and paper, and sensors in washrooms and elsewhere register flow and traffic, so that areas can be cleaned when a certain amount of people have used them. This kind of real-time information lets facility management be proactive, solving problems before they appear instead of discovering issues through complaints or long, repetitive control rounds.

The next step will be analyzing the data to inform the design and construction of new offices. Understanding how facilities are being used and where the inefficiencies are will let management build workplaces that better match the needs of their employees. The office environment will become increasingly “hygientelligent”.

“Companies hesitate to invest more in office connectivity because of the short-term costs, but they need to realize the concrete productivity benefits office IoT can provide in the form of happier, healthier employees” says Tony Löff.



“When it comes to improving the office environment through connected devices, hygiene is a key aspect”

Tony Löff, Regional Facility Manager, Global Expansion, H&M



Restroom hygiene – still an issue



Q: Restrooms in my office are not always properly cleaned

Time to act

Employees like connectivity too. From 65% in Berlin and Frankfurt to 88% in Shanghai, an average of 73% agree that increased connectivity and availability make our working lives better. People are also starting to realize the potential of intelligent hygiene solutions: according to our study about 40% of workers in New York and London think connecting things to the internet at the office can have an impact on hygiene.

Linda Ekener Mägi explains that the response to a successful smartphone-app Ericsson developed helping employees to instantly find available mini-meeting rooms was: “Great, now when will I get an app to find available toilets?” In offices with thousands of employees, solving these kinds of issues will have a real impact on worker productivity.

There is an opportunity for service providers and facility managers to actively help their clients understand the importance of investing in smarter solutions for office hygiene. Survey results are clear – people already expect their office environment to become more connected, and they think of connectivity as a means to make their working lives better.

As the office becomes increasingly connected, the challenge will be to gather all the information in one place. Today it is fragmented between different systems, with one service provider getting data from the coffee machines, another from the printers, etc. Once there is a common platform letting the information flow, we will see a shift from data as a part of office development to office development driven mainly by a new kind of data.

There are major opportunities ahead for facility managers who can play an active role in this data consolidation, helping companies understand how to interpret and act on the new abundance of information to create a smarter, more hygienic work place: a “hygientelligent” office.



NEW YORK
78%

say that increased
connectivity and
availability make our
working lives better

LONDON
38%

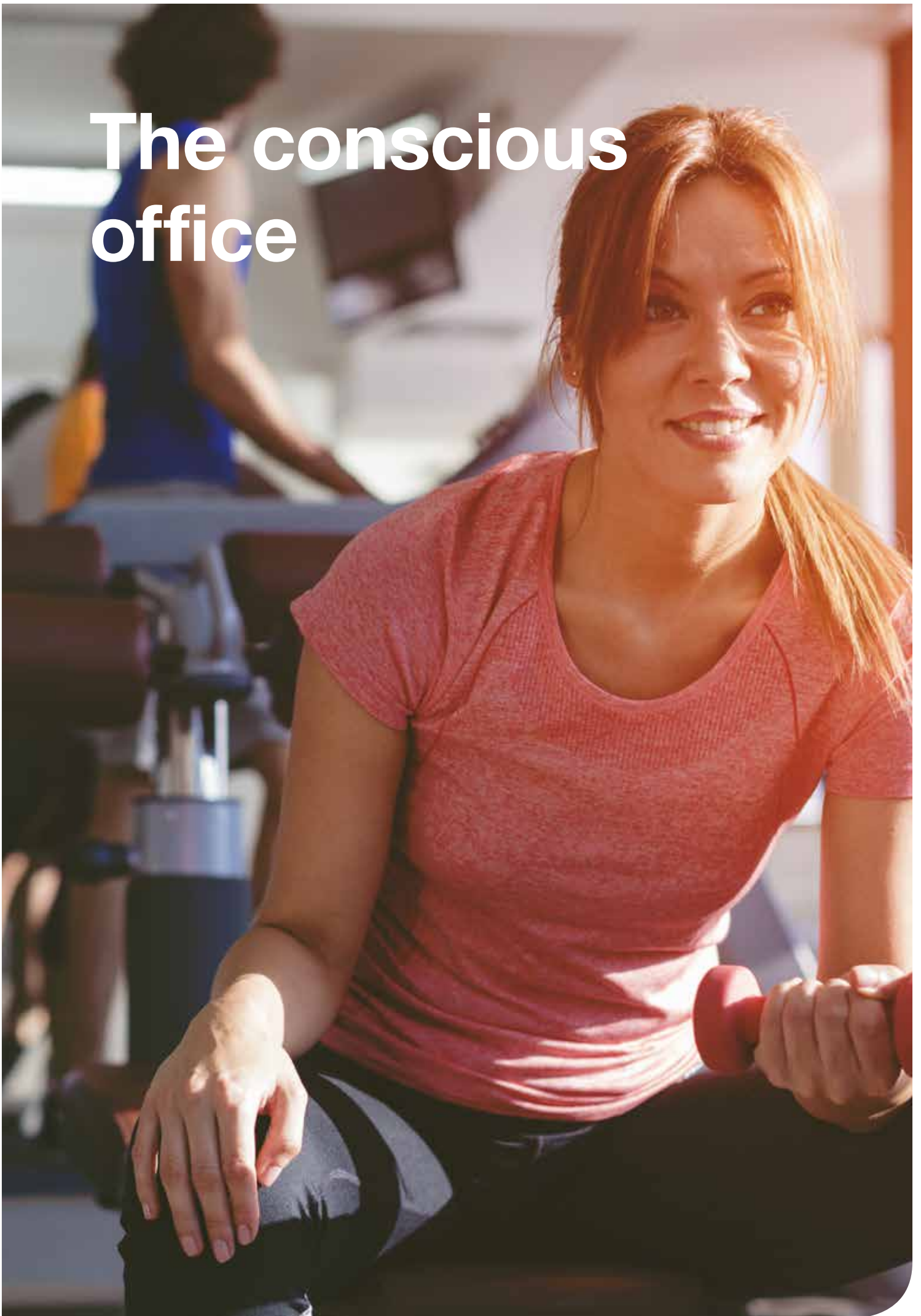
think that more things
connected to the
internet in the office
can have an impact
on hygiene

SHANGHAI
83%

believe more things in
their office will be
connected in the
coming years



The conscious office



Employees become increasingly lifestyle-conscious, driving demand for holistic solutions including everything from air quality to gyms. Managers that want to attract talent today need to provide a sustainable, hygienic and likeable office environment.

More than just a place to get the work done

In the offices of today, 45% of employees say they have a café, almost a quarter have a gym, and more than a third say their office is a good place for socializing with their co-workers after working hours. Why are we seeing these activities and services, traditionally limited to employee private life, entering the workplace?

According to Niklas Dahlgren, Productivity Solutions Specialist at Microsoft, this has to do with the development of the digital workspace and the freedom it has given the employees, available at your fingertips from anywhere through your phone, tablet or laptop.

A majority of office workers in all cities say that their company has the technical readiness to support remote work, and over 60% believe working remotely is good for their health. Managers need to ensure employees aren't avoiding the workplace, because of hygiene or other factors.

"There is no substitute for the personal meeting. People who only work digitally risk becoming increasingly peripheral, making it hard to ensure well-functioning groups," Dahlgren comments.

Employees have been given a taste of what it's like to work from anywhere, meaning offices are facing serious competition from employees' homes and other likeable places. Workers will still have to come in to the office, but keeping them happy in this environment will require more than it used to, including more versatile approaches to facility management as the workplace is increasingly used for cleaning-intense activities such as exercise.

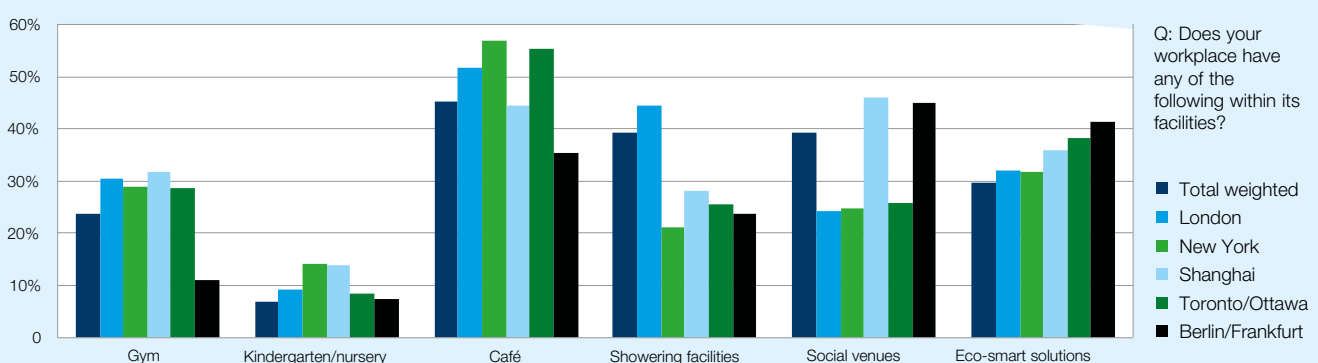
At the Redmond campus, Microsoft's 125 building headquarters in Washington with over 40,000 employees, the company not only supplies everything from soccer fields to miles of walking trails in the woods, management has also invited the best local restaurants to open up onsite so that employees don't have to leave their workplace to get high quality meals.

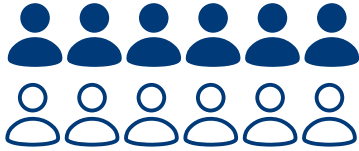


"There is no substitute for the personal meeting. People who only work digitally risk becoming increasingly peripheral, making it hard to ensure well-functioning groups"

Niklas Dahlgren, Productivity Solutions Specialist, Microsoft

Many offices worldwide are designed to enable other activities than work

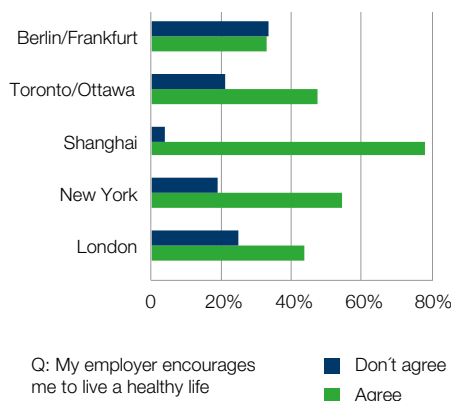




Wellbeing in the office

53% of surveyed office workers worldwide say their employer cares about their well being; 18% disagree.

Encouraging a healthy lifestyle



"We're constantly thinking about how to improve the quality of Microsoft workplaces. This includes everything from simple ideas such as detachable whiteboards you can take with you to your next meeting to experimenting with applications of our tech research like large touchscreen solutions for office and homes," says Niklas Dahlgren.

Healthy employees are happy employees

Again, with 79% of survey respondents saying they would inform their office managers or facility manager if they aren't satisfied with the quality of hygiene products, companies that are serious about attracting and keeping talented workers will also demand high-end hygiene solutions.

Employees that are more and more conscious of their office environment are part of a general wellness trend – people are becoming more aware of their lifestyles, wanting them to be healthy and sustainable. This drives demand for holistic solutions, ensuring a healthy and sustainable office environment in general.

Air quality, lighting and temperature are key aspects. Niklas Dahlgren believes we may see solutions in these areas that are more fine-tuned to employee preferences, such as allowing workers to choose between different areas with different temperature levels depending on whether they prefer a warmer or cooler environment. Controlling temperature is also a matter of sustainability.

"Connecting a vast network of data-providing sensors allowed Redmond facility management to discover and fix major inefficiencies such as air conditioners and heaters counteracting each other, thus saving massive amounts of energy," Dahlgren says.

Workers want better buildings

Already, more than half of office workers say that their employer cares about their wellbeing, and a third say that their office is designed with the employees' health as a first priority. This is good news for facility managers and service providers: high quality facility management is becoming an important unique selling point when companies decide which offices to rent.

Robert Tamilio Jr, Vice President, Sales & Marketing at leading janitorial and washroom supplier Strauss Paper recognizes the shift toward a more conscious office driven by employee demands: "Ten years ago tenant companies didn't care what was in the walls and how buildings were cleaned, today they demand to know."

The company supplies a number of A-class buildings on Manhattan, and is noticing changes in the way people are buying their products: "We supply the Freedom Tower. In order to get the contract we went through two layers of sustainability people before we could even talk about other dimensions of our products."

Tamilio Jr also says that executives are realizing that a healthy, sustainable building with environmental service products is a major marketing advantage. "It really brings a sense of pride to us," he says, "Clients are asking us to help them secure their long term business."

The future will be bright for cleaning companies and service providers that don't just bring a low price per square meter to the table, but offer a holistic approach to office hygiene and sustainability, meeting the demands of increasingly conscious workers and giving their clients a competitive edge.



“Ten years ago tenant companies didn’t care what was in the walls and how buildings were cleaned; today they demand to know”

Robert Tamilio Jr, Vice President, Sales & Marketing, Strauss Paper



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Share of office workers worldwide who say their office is designed with the employees' health as a first priority

The flexible office





Office design is shifting from one-size-fits-all to solutions accommodating different needs and different activities. These flexible offices will also require new, flexible hygiene solutions.

The shape of the office to come

Offices around the world are not only becoming more connected, their layouts are evolving as well. Over 60% say that their office has been redesigned at least once in the past three years. While individual rooms or cubicles and open landscapes still dominate, 15% already have other kinds of office environments.

In dense cities like London and New York with high rent, many companies are changing their offices to reduce costs. Traditionally, companies often have way more space than their employees need. Less than half of office workers in our survey say their office space is efficiently planned.

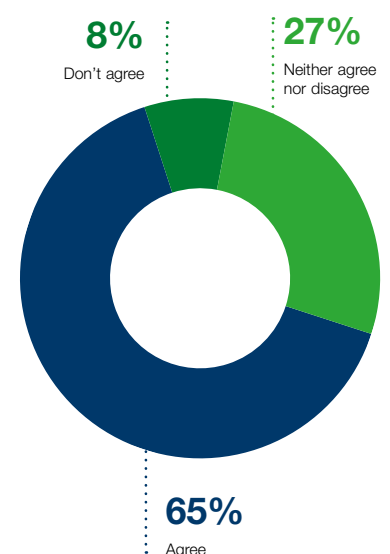
"If a factory had the same amount of unused space as the average office has today, it would have closed long ago," says Linda Ekener Mägi, working with strategic business development at Ericsson.

But rethinking the office is not just about cutting the rent; management also wants to keep staff happy and productive. 65% of workers agree that office space design has an impact on the atmosphere between co-workers, but what kind of office do they want?

Demands seem somewhat contradictory at first glance. Though 47% of office workers say they prefer an office designed to enable and encourage more social interaction, at the same time, 65% want an office designed to enable a quieter and more peaceful working environment.

A one-size-fits-all office won't do the trick: needs differ from day to day, as well as between different workers.

65% say the office space design has an impact on the atmosphere between co-workers

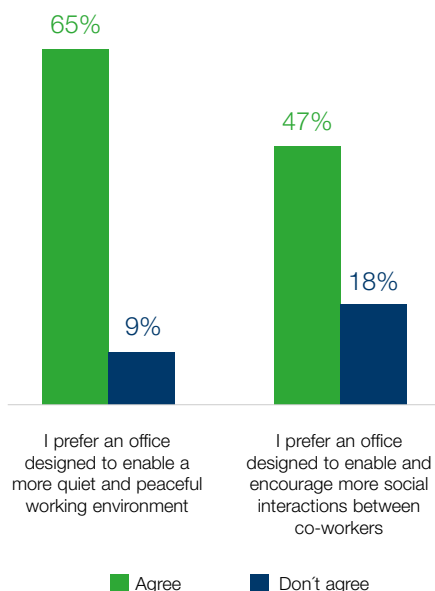


62%

Share of office workers who have had their office redesigned during the past three years



Office workers want it all – peace, quiet, and social interactions



"We will become smarter about recognizing and accommodating many differing needs when designing the office environment. Before, employers didn't even acknowledge that they existed," says Lisa Grape, Interior Architect at White, focusing on interior and design R&D.

"We've realized that open landscapes encourage too much multi-tasking, which stress research says is bad for us, but there are no economic or environmental incentives to go back to everybody having their own rooms. Activity-based offices will become more generalized."

Getting employees onboard

Activity-based offices, providing different environments that support different kinds of tasks instead of one fixed personal desk, can provide a good mix to meet these needs. But for an activity-based office to be efficient, its layout needs to be well-organized and understood by employees; the result of a thorough analysis and dialogue process centered on their needs.

"It is easy for members of management, who are making the decisions when redesigning an office, to forget that their employees do not have the same sense of control," says Lisa Grape.

In a more flexible office environment, accommodating differences and empowering workers to influence their situation is also important with regards to hygiene. Employees aren't homogenous, and neither is employee hygiene. 53% of the respondents say the hygiene level differs a lot between individuals at their office, while only 21% disagree.

In Toronto and Ottawa, almost two thirds believe they are more hygienic than most people at their office – which is of course mathematically impossible. Employees in all surveyed cities are uncomfortable with everything from using the same bathroom as people they do not know (42%) to crumbs and stains from other employees' food (62%).

The results highlight the differences in individual attitudes and perceptions when it comes to hygiene, providing an opportunity for FM companies to recognize and meet shifting employee demands.

Providing inclusive and flexible hygiene

Over half of workers globally often worry about getting infected by colleagues going to work when they are sick, which may explain why six out of ten believe that working remotely is good for their health. As we shift toward sharing more office space, expect solutions allowing employees themselves to be proactive in ensuring office hygiene to increase in demand.

"With people changing their workspace on a daily basis, sometimes several times per day, we need to provide solutions allowing employees to clean keyboards and other shared office components," says Ola Sarvik, member of Sodexo's international network of cleaning experts, "and expectations will be higher on the flexibility of our services."

As the office design becomes more flexible to accommodate the different roles and tasks of a company's employees, proactive solutions providing higher quality office hygiene and enabling employees to take more active control over workplace hygiene themselves will be sought after. Facility management and service companies that can provide these solutions will have a competitive edge.

About the study

During March and April 2016, Tork conducted a survey and interview series with the purpose of gathering knowledge and insights about global office hygiene trends. The Tork Office Trend report is the result of the study.

The survey was performed by means of self-completion online by office workers in the following seventeen city regions:
Amsterdam/Rotterdam, Berlin/Frankfurt, Brisbane/Sydney, Copenhagen, Dublin/Cork, Helsinki, London, Moscow, New York, Los Angeles/San Francisco, Oslo, Paris, Shanghai, Stockholm, Toronto/Ottawa, Vilnius, Warsaw.

A total of 8,000 responses were collected. In the report, numbers for total are weighted averages where each city region regardless of size or number of respondents is given an equal weight.

The interview series was performed with the following individuals:

Tony Löff, Regional Facility Manager, Global Expansion, H&M
Linda Ekener Mägi, Strategic Business Development, Ericsson
Robert Tamilio Jr, Vice President, Sales & Marketing, Strauss Paper
Niklas Dahlgren, Productivity Solutions Specialist, Microsoft
Lisa Grape, Interior Architect focusing on interior and design R&D, White
Ola Sarvik, Head of Soft FM, Nordics and member of Sodexo's global cleaning expert network, Sodexo



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