



FM:Systems 2022

Refocus & Rationalize the Workplace Report for Government

Methodology:

FM:Systems conducted this study in collaboration with independent market research firm PureSpectrum, using its platform to survey leaders in HR, finance, facilities, and real estate. The survey was executed between Oct. 25, 2022 and Nov. 1, 2022.

Executive Summary:

While many organizations have reopened their offices since the pandemic, business leaders are facing the realities that the new world of work will continue to evolve in the months and years ahead. While navigating changing work patterns, shifting employee attitudes and expectations, preparing for a potential economic downturn, and/or attracting and retaining talent amid a tight labor market, FM:Systems surveyed leaders in HR, finance, facilities and real estate to see how they are keeping up with delivering the right spaces and experiences for the people who use them. In this survey, we also gauged their sentiment on how they feel about hybrid work, the value in a physical office, as well as workplace challenges and opportunities that are top of mind for them in the next 1-3 years.

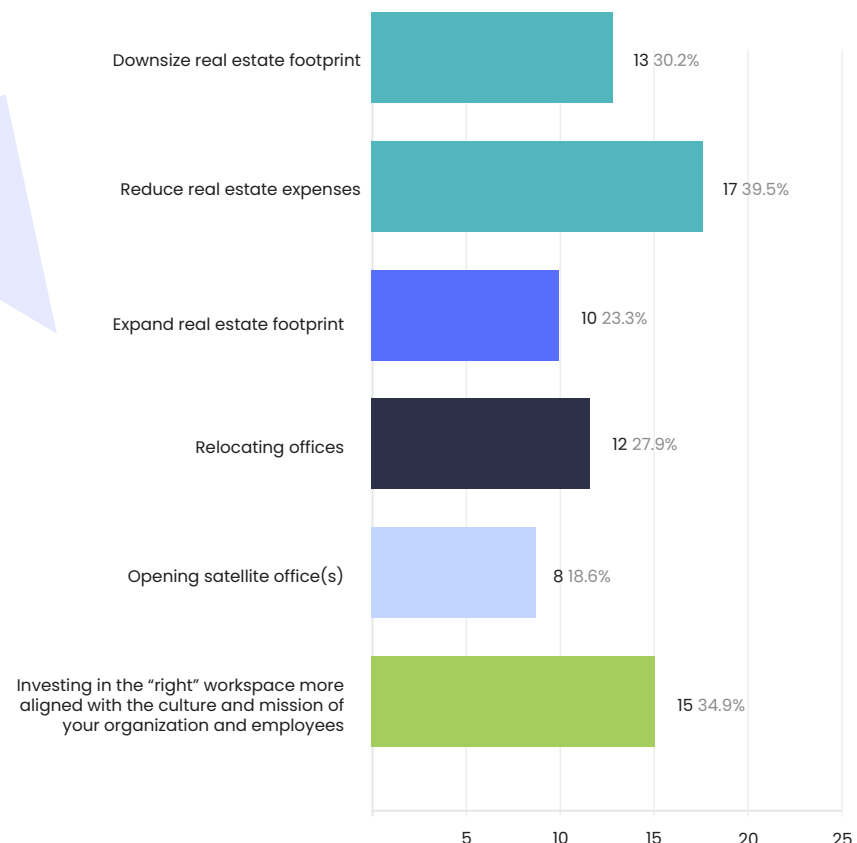
KEY FINDING #1:

Investing in the “right” workspaces and reducing real estate costs are among top priorities, yet most lack accurate data to make informed workplace decisions.

QUESTION

What are your main priorities for your real estate and workplace(s) in the next 1-3 years?

Of the government agency leaders surveyed, 40% consider reducing real estate expenses as a top priority in the next 1-3 years, with 35% prioritizing investing in the right workspace aligned with the culture and mission of their organization. Still, 3 out of 4 business leaders say they lack reliable utilization and space data to make informed decisions about their workplace and real estate needs.





Part of the challenge is that

42%

of government agencies say they have been tracking their new hybrid work arrangement either manually or not at all including...



35%

of organizations with over 1 million square feet of office space and...



38%

of organizations with 10 or more office spaces.



Most government agency leaders would like to spend less time on ensuring there are enough desks/rooms for employees to use (47%), manually tracking employee attendance (40%), and manually tracking visitor traffic (37%), if they had a workplace management solution that could automate these tasks.



- Manually tracking visitor traffic (37%)
- Manually tracking employee attendance (40%)
- Ensuring there are enough desks/rooms for employees to use (47%)

Out of all the survey respondents, access to accurate utilization (42%), followed by space data (41%) are considered to be most lacking to confidently inform real estate and workplace decisions in the next 1-3 years.



- access to accurate utilization
- space data

Surprisingly, organizations with over one million square feet of office space reported space (50%) as being the most limited data source, followed by cost (21%).



- cost
- space data

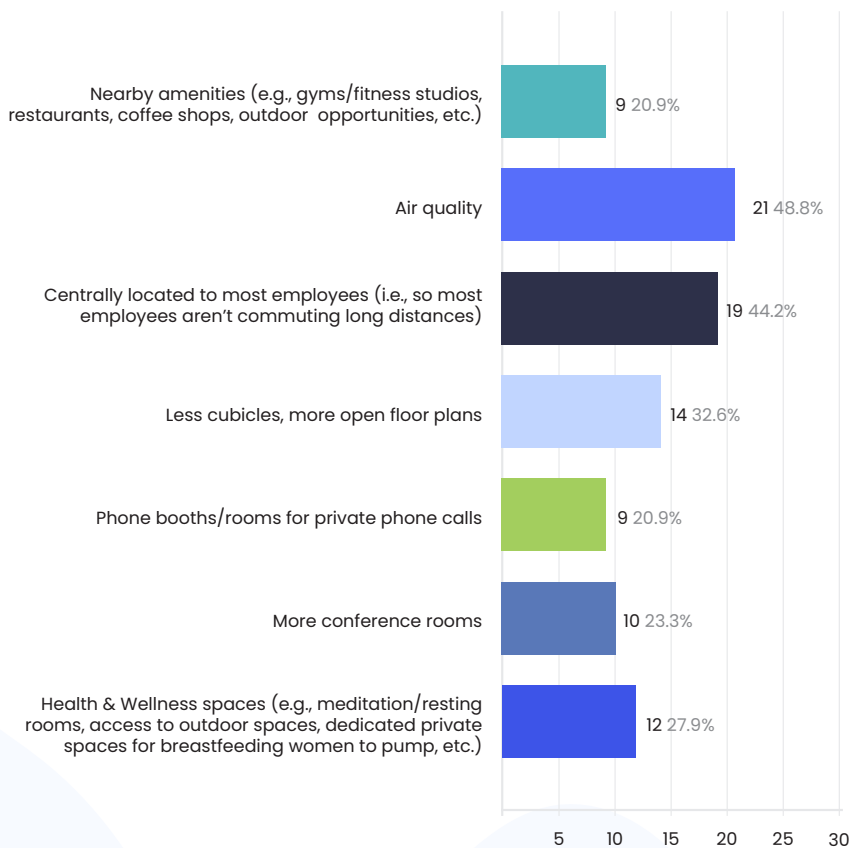
KEY FINDING #2:

Shifting realization of the physical office as a workplace destination.

QUESTION

What aspects about the future workplace are a priority for your organization?

After working remotely for so long without productivity suffering, organizations want the physical office to be a place employees want to come to work and can get the most out of working together in-person, like collaborative work, ideation, and culture building opportunities.



Half



of all government leaders believe their future workplace needs to be centrally located to most employees.

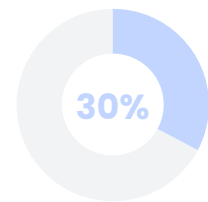
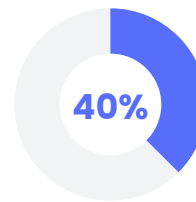
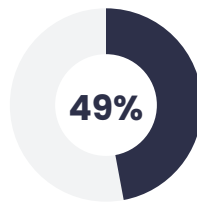
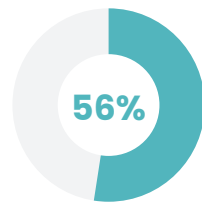
1 in 3



want fewer cubicles and more open floor plans.

Government leaders believe

team meetings, collaborative work, client meetings, & onboarding new hires



are among some of the primary roles of today's workplace.



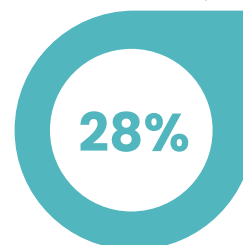
Nearby Amenities



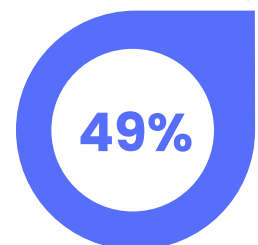
Finding an office with **nearby amenities**, including access to fitness studios, restaurants, coffee shops, and outdoor opportunities for employees are also priorities for nearly 21% of business leaders.

Health and wellness spaces, like meditation rooms, access to outdoor spaces, and dedicated private spaces for employees breastfeeding to pump, also ranked high (28%) on the list of aspects business leaders want to offer their employees; as did **indoor air quality** (49%) as a top priority.

Health & Wellness Spaces



Indoor Air Quality

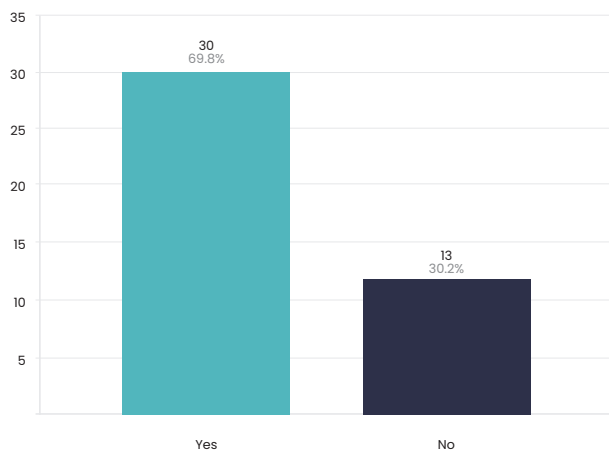


KEY FINDING #3:

Many government agency leaders are still struggling to accept new ways of work, but accepting them anyway to stay competitive.

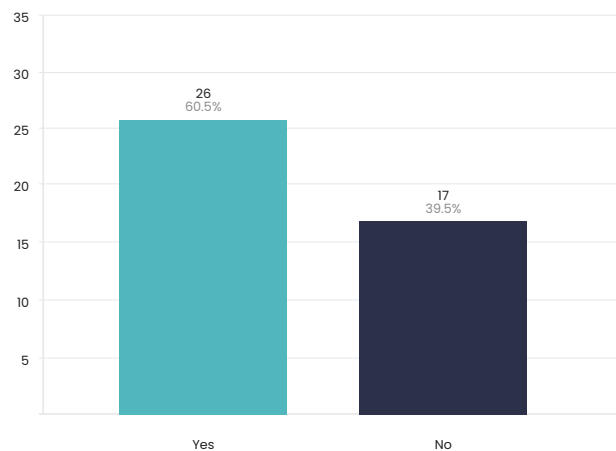
QUESTION

Do you think hybrid work will continue to be the primary work model in the next 1-3 years?



QUESTION

Do you think employees should work full-time in the office in the next 1-3 years?



Despite a majority (80%) of business leaders believing hybrid work will continue to dominate over the next 1-3 years, 61% would prefer employees back in the office full-time. Regardless, there's consensus that hybrid work will continue to be the primary work model.





Government agency leaders who think it's important for employees to work in the office full-time say it supports the organization's mission **(65%)** and provides an opportunity to strengthen company culture **(50%)** when everyone's in-person as top reasons.

Nearly half



believe people are less productive when remote. That sentiment was strongest among organizations in



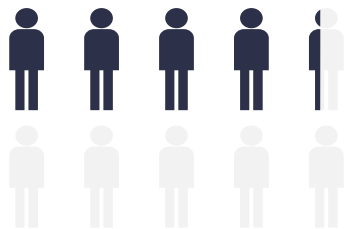
35%
finance



19%
and healthcare



Even among those who favor full-time office work, **70%** of government respondents acknowledge hybrid work will lead because it allows employees to achieve a better work-life balance. **43%** also believe hybrid work will help them attract and retain talent.



Almost **43%** think hybrid work is here to stay because people can choose how they'd like to get different types of work done, when and where they're most productive.



Nearly **43%** of all business leader respondents believe hybrid work provides the opportunity for reduced amounts of real estate, and thus saving on real estate costs.

KEY FINDING #4:

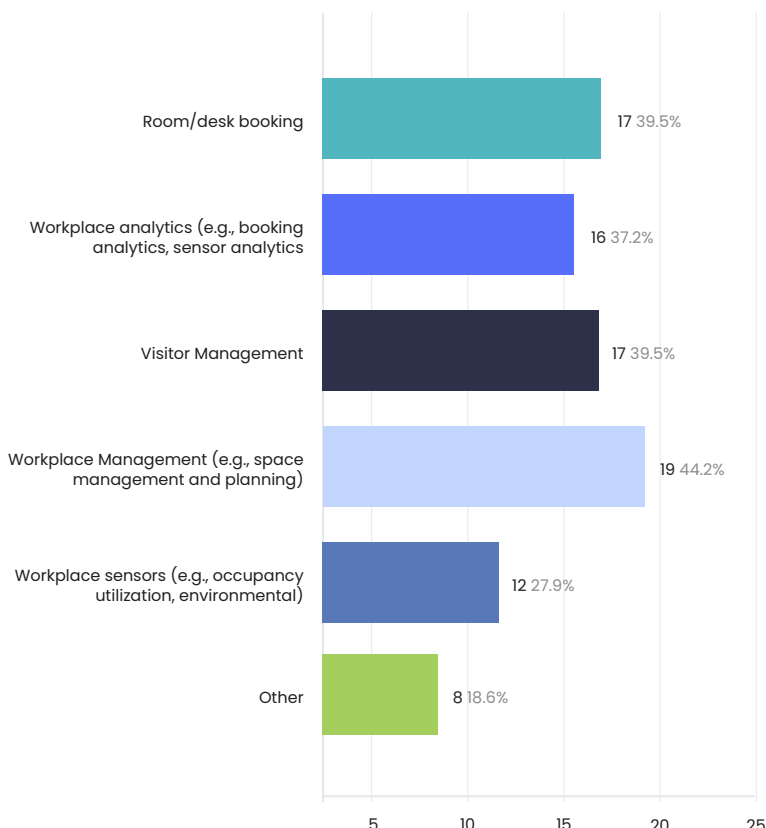
Employee preferences matter now to real estate and facilities teams.

Traditionally, real estate and facilities leaders have turned to workplace management solutions, like IWMS (Integrated Workplace Management Solutions), to track and maintain space and occupancy information in order to project and forecast how much real estate an organization will need. And although workplace management solutions continue to be a priority for real estate and facilities teams, with the rise of hybrid work and a growing emphasis on supporting the health and well-being of employees, these business leaders are looking for additional data sources that can reveal employee preferences and how visitors interact within these spaces as a way to drive future workplace decision making.

QUESTION

What workplace management solutions are you planning to continue using, or looking to adopt over the next year to support your hybrid work arrangement?

Overall, workplace management (44%), room and desk booking (40%) and visitor management (40%) were among the top 3 workplace management solutions real estate and facilities teams plan to invest in over the next year to support hybrid work arrangements. Workplace analytics (37%) and workplace sensors (28%) were considered lower priorities, but still intend to use to inform their real estate and workplace decisions. Only 18% do not plan to use any workplace management solutions.



Advanced workplace analytics platforms are capable of combining a variety of sources of data, from employee attendance to areas of “wasted” space (underutilization) and congestion to departmental utilization and allocation, to the size, frequency, and duration of meetings, and much more. By analyzing these multiple data points, decision makers gain the key insights needed to accurately understand office floor plans, how teams work, and ultimately ensure the organization creates efficient environments and ideal experiences for all the people who use or visit the office.

Want to take the guesswork out of space management? Learn how FM:Systems can help your organization deliver the objective data and workplace intelligence you need to make informed decisions about your workplace and real estate strategy, enabling high-performance facilities and highly productive employees.

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