HAWORTH

Evolving Workplace Global Study

Fine-tuning the Experience of Work



June 2025



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Global Data Sheds Light on Evolving Work

Today's organizations are swimming in a sea of complexity. With more people and businesses in the global marketplace than ever before, digitalization rewiring the way we communicate, and technological advancements speeding the pace of change, making informed decisions has never been more difficult. It's also never felt more important.

In such a complicated, turbulent landscape, competition over emerging opportunities is fierce, and small decisions can have outsize impacts. A real estate footprint or office floorplan isn't as easily updated as a spreadsheet or a website. Yet both have a significant influence on workplace culture, productivity, and the bottom line. Leaders at organizations large and small are under pressure to get it right.

To help decision-makers create spaces that empower people to thrive and work their best, Haworth set out to discover how organizations across the globe are navigating the shifting cross-currents. In 2023, we issued our first global workplace survey and widely shared the resulting insights, with evidence that hybrid work will persist and evolve.

In our latest survey, administered in Q4 2024, we accordingly added new questions on hybrid work to get a sense of how organizations are responding to the various benefits and challenges of this global sea change. In parsing the results, we identified six key insights, common pain points, promising solutions, and clear indications that—for some workplaces at least—the time is right for making space changes.



Insight 1

Hybrid work policies have stabilized.

Implication: Space planning is more predictable.

Organizations continued to add, subtract, and tweak hybrid work policies in 2023; but few reported major changes in 2024. This trend was consistent across regions, with 74% of organizations indicating they have a formal hybrid work policy in place—holding steady from 77% last year. Generally, organizations that had hybrid policies in place in 2023 continue to support hybrid work today. Those that did make changes in 2024 were more likely refining details rather than reversing course.

8%

Organizations who implemented hybrid policies after 2022.

In the Asia-Pacific region, 67% of organizations reported having formal hybrid work policies—slightly below the global average. That said, adoption of flexible working arrangements is steadily increasing, with Singapore and Japan taking the lead. Country-level differences are notable: While the majority of Chinese organizations required employees to be in the office daily, pulling down the regional average, 91% of organizations in Australia reported having a formal hybrid work policy. These variations likely reflect differing social and cultural norms across the region.

North American organizations were slower than their global peers to adopt formal hybrid policies, with many waiting until 2022. Today, however, hybrid work in North America largely aligns with global practices. Most organizations globally have settled into established protocols, typically requiring about three in-office days per week.

This policy stabilization provides a solid basis for future space planning. Moving forward, organizations can more confidently align workspaces and layouts with the expected in-office population.





Inside the Insight

Which hybrid work policy details changed?

When companies made changes to hybrid work policies in 2024, the changes likely reflected a desire to fine-tune performance. Among the most frequently altered policy details were:

The number of mandated in-office days

Specific days hybrid workers were required to be in-office

Hours hybrid workers were expected to be online when working remotely

Expectations for earning assigned vs. unassigned in-office workstations

Insight 2

Space changes are happening for three primary reasons.

Implication: A balanced approach to design considers all three.

Nearly two-thirds of organizations reported making major space changes in the past three years. The biggest motivation for these changes, cited by more than half of survey respondents, was to realize savings through reductions in real estate costs and/or footprint. Close behind was the need to better align workplace environments with the evolving needs of employees. The third biggest motivator was to improve the look and feel of workplaces—creating appealing, attractive spaces through improved design, aesthetics, and supportive features.

62%

Organizations who have made significant space changes in the past three years.

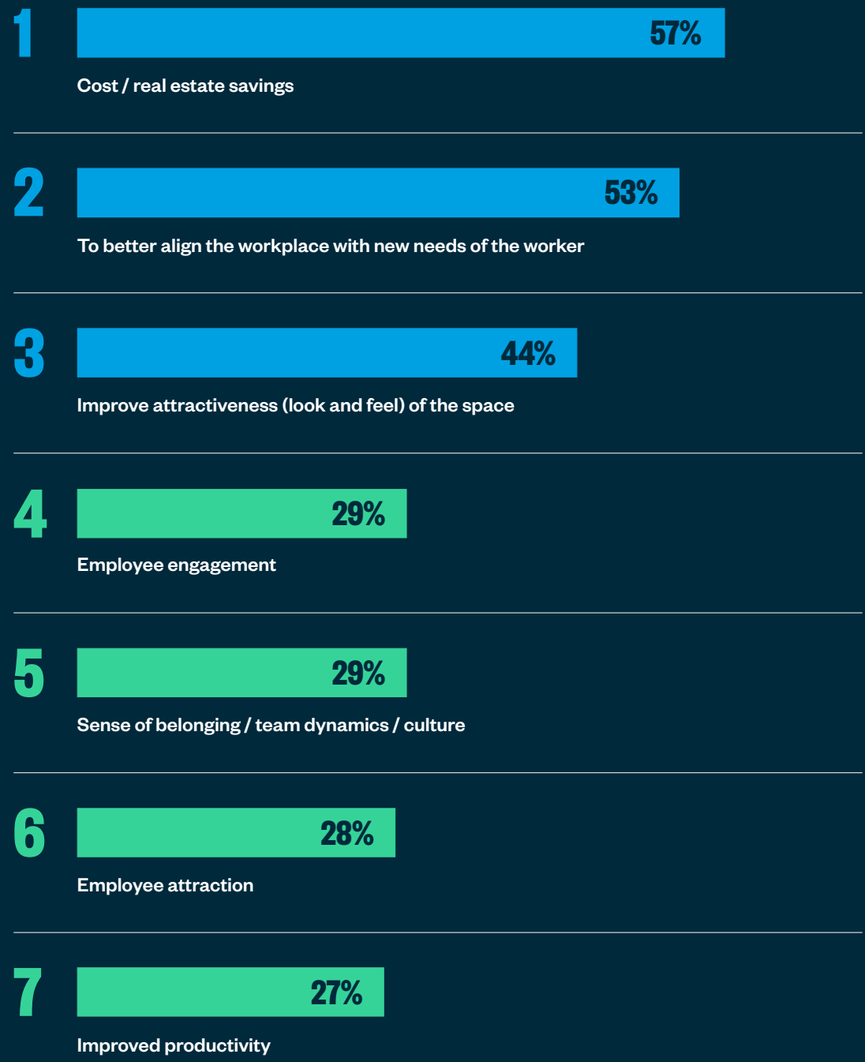
While some organizations cited other reasons for making space changes (for example, improving employee engagement or enhancing a sense of belonging, with each cited by 29% of survey respondents), the vast majority pointed to at least one—though not all—of the top three motivations.

Approaches to space changes also vary across regions. In Asia-Pacific, many organizations reducing square footage are simultaneously investing in upgrades to create more comfortable work environments. In Germany, more companies are moving toward activity-based working as a means to entice people back to the office. And in North America, organizations are recognizing the value of how workplace design has a positive influence on workers' moods, creativity, and well-being—driving human performance through aesthetics.

Based on the consistency of how often the top motivations were cited, coupled with regional nuance, it's becoming clear that organizations are making space changes for different primary reasons, spanning supporting employees to meeting business goals. Given the number of employers making changes and their reasons for doing so, organizations may benefit from taking a balanced approach—one that considers cost savings in relation to employee needs and workplace design.

Top Three Space Change Motivations

What drives the executive team's decisions regarding your space changes?

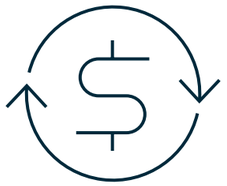


Inside the Insight

Three primary reasons organizations are making space changes:

1

To realize savings through reductions in real estate costs and/or footprint



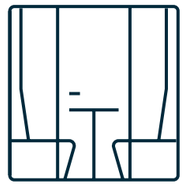
2

To better align the workplace with the new needs of workers



3

To improve the look and feel of workplaces





Insight 3

The main (not only) purpose of today's office is to collaborate and connect.

Implication: Offices still need to support different types of work.

When asked why employees come into the office, organizations across regions gave a consistent answer: to collaborate and connect. Conversely, when asked why employees work from home, responses varied: to focus, to achieve work-life balance, and to avoid the commute.

71%

Organizations who made space changes added video calls/focus rooms in the last three years.

This points to a central dilemma many organizations are facing: There is broad agreement on what the office is for and no single reason as to why employees might choose to work from home instead. Workers in some industries, regions, or roles might choose to stay home for the same basic reasons that others choose to come in. Interestingly, some respondents cited the need to focus as a reason for coming into the office.

This implies each employer must look to its own workforce—perhaps investing in internal data gathering—to define what "optimal" looks like for them. What works best for one company may not work best for another.

One clear takeaway: People want to be able to do different types of work at work. Even if the main purpose of the workplace is collaboration, organizations also need to consider adding the spaces that support deep focus work.



Inside the Insight

Is in-office work worth the commute?

For some workers—facility managers, hospital staff, laboratory researchers—the case for on-site work is clear. For others, the benefits of being on-site are fuzzy, especially compared to the costs they incur and, in particular, the costs of commuting.

Commutes were a pain point for workers in all regions in 2024, though the reasons varied from region to region. In India, long commute times were a major issue for workers, mostly due to a lack of macro infrastructure. In Europe, some workers who moved out of city centers after the pandemic now face longer or impractical commutes. North American workers' distaste for commuting stems less from distance and more from a desire to maintain recent gains in work-life balance.

While many organizations agree that on-site work comes with real benefits—creativity, camaraderie, motivation to excel—these collective gains can sometimes feel less immediate to employees than the personal trade-offs required to achieve them.

Working from the Office

Pros



Collaboration



Connection

Cons



Commute



Work-Life Imbalance



Focus Issues



Insight 4

Organizations are seeking the right balance of space use.

Implication: The activities taking place in a space should drive the space design.

Between 2020 and 2023, office floorplans around the world transitioned from individual spaces in favor of more collaborative, social, and restorative areas. That pendulum started to swing back between 2023 and 2024, indicating offices may have underestimated the need for individual spaces in the return-to-office era. Still, compared to 2020, floorplans continue to include more collaborative and social/restorative spaces.

In North America more than any other region, organizations have an opportunity to add collaborative and social/restorative spaces, as individual spaces are more prevalent compared to the global average.

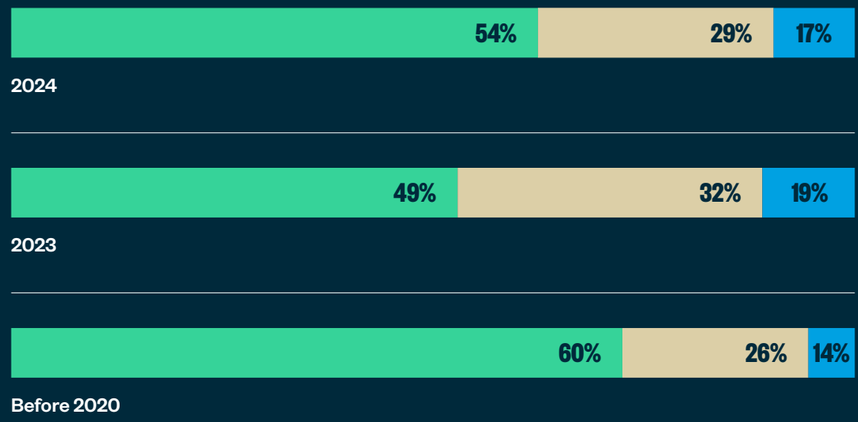
Globally, the most added space types in the last three years were individual spaces, with 71% of organizations adding video call/focus rooms and 67% adding unassigned workstations. At the same time, some organizations were also removing specific individual spaces more frequently than others, with 59% reporting fewer assigned workstations and 56% reporting fewer single-person offices. As with collaborative and social/restorative spaces, these shifts indicate that organizations overcorrected in response to hybrid work adoption. For example, unassigned workstations accounted for 52% of office floorplans in 2024 vs. 64% in 2023. However, the amount of unassigned workstations is still double what it was in 2020.

This points to an overarching trend: As the adoption rate of hybrid work policies has stabilized, smaller space changes were made between 2023 and 2024 than those seen between 2020 and 2023. This likely reflects organizations' increased confidence in predicting people and space needs and in fine-tuning details.

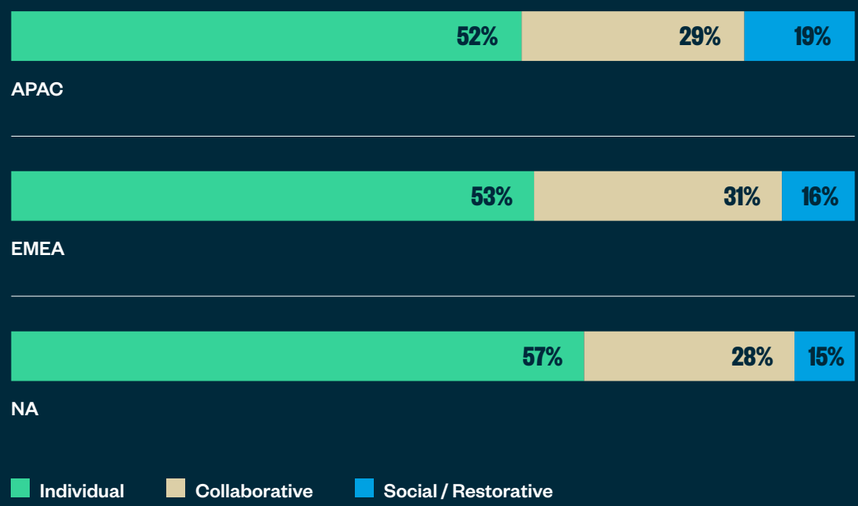
Taken together, this indicates that variety in space types and overall flexibility are key features of the modern office. Many organizations are finding that unassigned workstations are not a good fit for all circumstances, especially as more employees return to the office. As organizations currently seek the right balance, they may benefit from identifying and prioritizing the most critical in-office activities to ensure that space design directly supports what matters most.

Floorplan Space Shifts

Global Mix



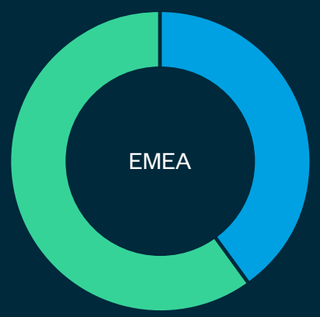
2024 Regional Mix



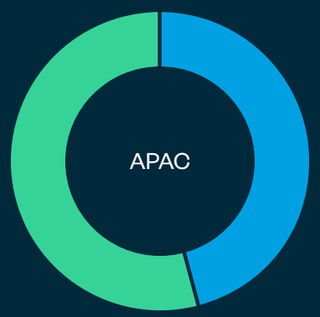
Inside the Insight

To assign or not to assign: A global perspective.

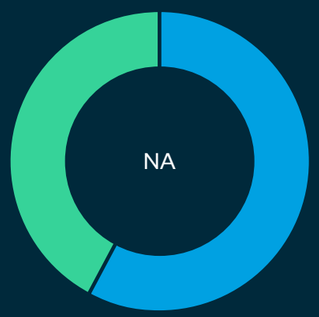
Globally, the ratio of unassigned to assigned workstations is approximately 50-50, with more assigned workstations today than in 2023.



40% Assigned
60% Unassigned



46% Assigned
54% Unassigned



58% Assigned
42% Unassigned

Global

Before 2020

74% Assigned

26% Unassigned

2023

36% Assigned

64% Unassigned

2024

48% Assigned

52% Unassigned

Insight 5

With less space and more people, acoustics is still a top challenge.

Implication: Sustaining performance may hinge on implementing new acoustics solutions.

More than half (53%) of organizations worldwide decreased office space in the last three years, and 37% closed or consolidated locations. With the widespread adoption of hybrid work policies, this makes sense: Fewer on-site workers require less space. But as some organizations have transitioned from fully remote to hybrid work—and/or updated policies to increase the required in-office time—they now face a new challenge: how to comfortably accommodate more people in less space.

In 2024, the number of organizations reporting increased density in their floorplans jumped from 33% to 47%—a 14 percentage point increase in one year. Acoustics emerged as the top workplace challenge, cited by more than half (52%) of organizations overall. That number was even higher for organizations that had decreased space (62%) or increased density (60%).

Density-related acoustic challenges are being amplified by open-office floorplans, frequent video calls, and increased on-site collaboration. Together, these challenges pose a risk to performance, as noise and distractions have been shown to harm productivity, cause stress, and decrease employee engagement.

These trends of less space, greater density, and intensifying acoustic challenges were seen across regions. In China, increased density and noise challenges were tied to organizational pressure to maximize the value of each square meter of office space. In Singapore, one organization noted that the number of video calls is increasing without enough booths to accommodate them, leading to overall higher noise levels in open-plan offices.

In France, densification is contributing to noise issues and an inability to focus, attributed to either underuse or lack of acoustics solutions. In North America, respondents noted that workers returning to the office were more sensitive to ambient noise—and less aware of how their own actions (e.g., taking video calls at their desks or in the open) might be impacting their colleagues.

As organizations navigate the uptick in on-site work, exploring multiple avenues ensures employees can focus at work as well as they do at home. Promising strategies include implementing physical acoustics solutions, encouraging new behavioral norms, and relaxing rigid return-to-office mandates so workers feel free to come and go in response to environmental triggers.



Real Estate Changes

What real estate changes has your organization made?

1. 53% — Decreased office space
2. 44% — Maintained total space but changed space layouts
3. 37% — Closed / consolidated offices
4. 32% — Added coworking spaces
5. 25% — Increased office space
6. 13% — Other
7. 11% — Added satellite offices

Floorplan Changes

How has your floorplan changed?

1. 59% — Activity-based planning
2. 53% — Neighborhood planning
3. 47% — Increased density
4. 14% — Decreased density
5. Other (4%)
6. No change (3%)

Insight 6

Space changes are driving workplace satisfaction.

Implication: Adjusting spaces to better support workers comes with significant benefits.

Organizations that made major space changes in the last three years report employees have increased satisfaction with their work experience. These findings held true across regions, with Europe seeing the highest rates of worker satisfaction and North America the lowest.

In the Asia-Pacific region, worker satisfaction at organizations that made major space changes was 7 percentage points higher (78% vs. 71%) than at organizations that did not. In Europe, the Middle East, and Africa, it was 11 points higher (81% vs. 70%). And in North America, it was 21 points higher (72% vs. 51%).

These figures suggest that (1) organizations that have not recently made space changes stand to benefit from doing so and that (2) while overall work satisfaction may be lowest in North America, organizations have the most to gain from reimagining their spaces (and the most to lose by allowing spatial innovation to stagnate).

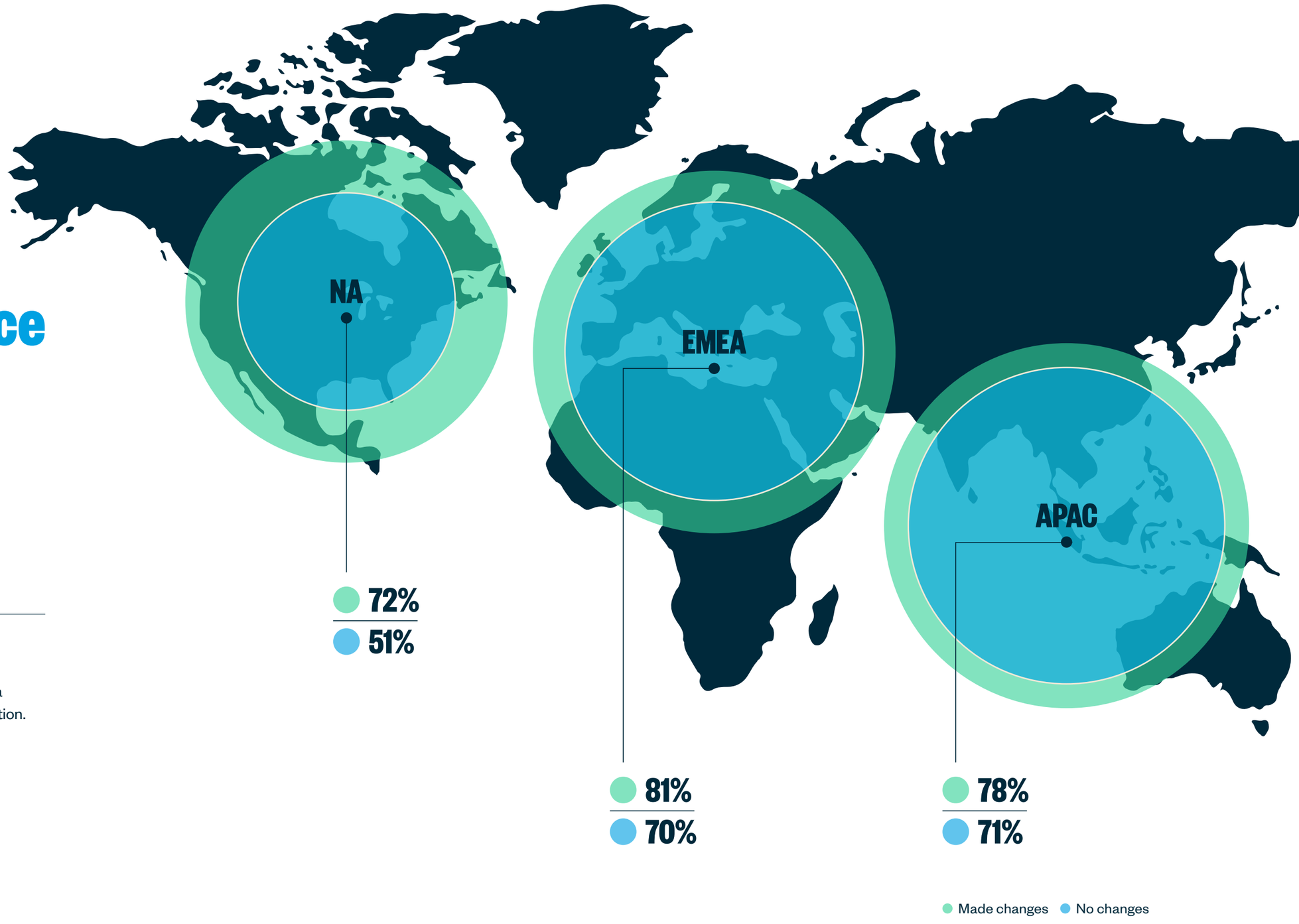
The data also suggest that employees—even hybrid workers who split their time between the office and other spaces—are aware of the state of their offices and appreciate the space changes made on their behalf. In the Asia-Pacific region, organizations noticed that flexible working styles also bolster employee satisfaction.

One respondent noted that having the option to choose whether to work in the office, at home, or another space is a major driver of employee satisfaction, even though many workers have long since returned to the office full time. Another observed that organizations investing in new spaces are also putting significant effort into internal surveying and trend learning to ensure those new spaces meet workers' needs. In contrast, North American organizations were the least likely to have made space changes, reported by just 54% of organizations compared to the global average of 62%.



Inside the Insight

Workplace Satisfaction Based on Space Changes



Why is baseline worker satisfaction lowest in North America?

In this survey, as well as others, North America demonstrated lower baseline employee satisfaction. While a lack of recent space changes is one contributing factor, others may include:

- Less work-life balance and vacation time
- Lower job and/or financial security
- Higher stress and pressure to perform
- Cultural emphasis on individual achievement
- More focus on individual compensation

The Workplace Will Continue to Evolve

Despite the many—and major—changes that have caused organizations across the globe to rethink their policies, space design, floorplans, real estate footprints, and aesthetics, the needs of workers remain largely the same. People still crave inspiring spaces that help them do their best work, connect them with others, and support their well-being.

In 2025, meeting these needs may look different from years past, as the way that we work has changed significantly. While workers generally prize the flexibility and enhanced work-life balance that hybrid work policies provide, these benefits come with costs, including fewer in-person interactions (and parallel impacts on workplace culture) and increased reliance on digital technologies. Office acoustics remains a top concern across regions and industries. At the same time, offices are increasingly serving as hubs for collaboration and connection.

Balancing these opposing forces will require a willingness to get curious, ask questions, follow the data, and at times, move away from the status quo in favor of new solutions that allow people to work more effectively and efficiently. As work continues to evolve, Haworth is committed to tracking global trends and sharing our findings. As complex as the wider world may be, a data-based, informed approach to workplace design still represents genuine opportunities.

Methodology & Participants

Haworth's latest global workplace survey was administered between October and December 2024 and generated 408 total responses. Submissions spanned 5+ continents, 33 countries, and 23 industries. Data analysis was conducted between January and March 2025. Results were considered globally and aggregated into three regions: North America, APAC (Asia-Pacific), and EMEA (Europe, Middle East, and Africa).

More than half of survey respondents maintain multiple locations globally, 36% maintain multiple locations in one region/country, and 10% maintain a single location.

Organizations of all sizes were invited to take part, with 23% of responses coming from organizations employing between 1 and 500 employees and 44% from organizations employing more than 10,000.

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