

SONY

Different times; different needs

The changing workplace and how to navigate it

For decades, companies have been trying to find the balance between public and private workspace that best support productivity and collaboration. Since the 1980s, the pendulum has been swinging back and forth from open to enclosed workspaces in a series of attempts to address the need for either more interaction or greater privacy.



Remote work enabled by technology

Thanks to the growth of digital meeting platforms (such as Skype, launched in 2003), remote working started to become a viable option about 15 years ago.

When COVID hit, the trend rapidly gained momentum as office employees around the world were literally forced to 'get with the program'.

Emergence of hybrid working

From that point onwards, the lines between office, home and other locations became blurred and soon, the term 'hybrid working' was coined. Companies quickly saw that hybrid working brought many powerful benefits which the office alone could not:

- Improved workplace efficiency and productivity
- Increased concentration & workplace satisfaction
- Increased recruitment and retention, increased trust
- Future-proofing the organization
- Improving emotional and physical wellbeing

Flexibility breeds satisfaction

Many members of the new hybrid workforce are enjoying the increase in flexibility. One study from IWGⁱ found 72% of employees would prefer the option of hybrid working over a full-time return to the office, even if that came with a 10% pay decrease. This is not surprising when you consider the strong connection between workplace satisfaction and autonomy, one of Daniel Pink's famous three pillars of motivationⁱⁱ.

No going back

At one stage, mid-pandemic, companies were talking about a 'return to normal' i.e. going back to full time office attendance. But now the genie is out of the bottle, it cannot easily be pushed back in. In CBRE's recent Workforce Sentiment Survey of 10,000 employees across 18 countries, 85% of respondents said they would prefer to work virtually at least two to three days a week going forward.

Having said that, the picture is not identical across all continents and cultures. Decision-makers in the U.S. and Europe are farther along than Asia-Pacific in fully embracing hybrid work.ⁱⁱⁱ

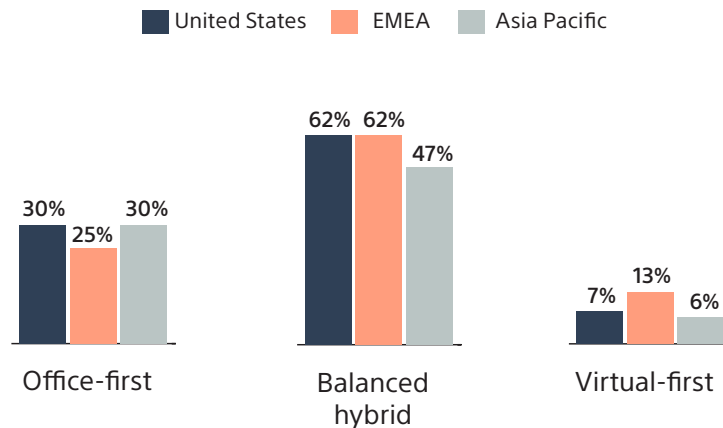
A must for recruitment and talent retention

In a world where talented employees are becoming more global and more mobile, workplaces need to adapt. Offering hybrid working is now a potential deal-breaker when it comes to attracting and maintaining talent.

87% of workers prefer working remotely... or at least having the option to do so.

Source: PwC Remote Work Study January 2021

Sentiment toward future of work



Source: CBRE 2021 Occupier Sentiment Survey

“What best describes the type of seating plans you anticipate in most of your workspace?”

51%

Activity-based working

35%

Targeted mobility

8%

Hot desking

3%

Dedicated seats

Source: CBRE 2021 Occupier Sentiment Survey



Gone are the days when companies could dictate their terms

The US saw a record number of resignations in 2021, with 4.3 million employees leaving their jobs across the nation. Meanwhile, in the UK, almost a quarter of workers were considering changing jobs. 69% expressed confidence about finding a new position within the next few months (compared to the typical annual figure of 11%), and only 16% were worried they would not find a new role.^{iv}

It's good to have options

Employees typically now have a choice of at least three places to work: the corporate HQ, the home office and the extended office (i.e. a satellite office provided by their company, co-working offices or seating provided by your company or at personal expense, "public offices" such as coffee shops, libraries and hotel lobbies.)

The coworking space category is growing at a brisk pace. By 2024, there will be double the number of units compared to 2021. Again, we see some regional variations, with Asia Pacific counting the highest number of coworking spaces (5,889), followed by Europe (5,858) then North America (4,698).

Focus on the employee experience

To summarize, many companies are feeling the pressure to provide the best possible employee experience - to attract the best talent and to ensure they stay engaged and motivated.

Enabling hybrid working is one way to stay ahead of the curve, but in order to deliver the best results, it should be accompanied by technologies like Workplace Experience Apps. These encourage the level of interaction organisations aspire to, creating a new layer of experience, in which the physical world and digital worlds meet.

Growth of Workplace Experience Apps

A report from Research & Markets (the “Global Market for Workplace Experience Apps 2020 – 2025) connects the rise of such apps with the rise in flexible ways of working.

Currently growing 19.4% per year, they are seen as a way to attract people back to the office - at least part time - and to combat the resignation trend.

33% of US companies and 23% of European companies are using or plan to use employee experience apps

(regardless of size of the company)

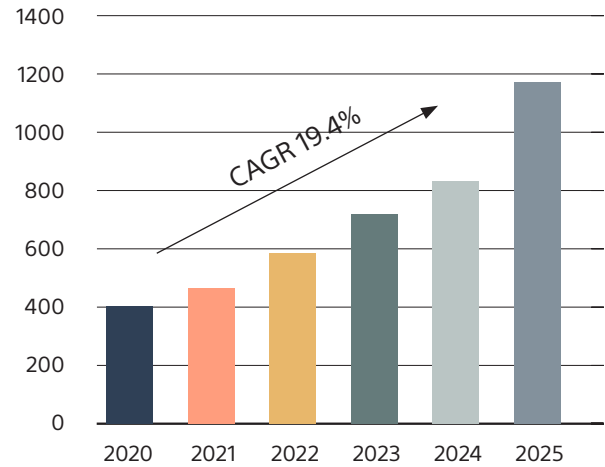
Source: Latest office occupier study from CBRE

Growth of Occupancy Analytics

With a hybrid workforce making more flexible use of the office, the demands on facility managers are also changing. Once primarily concerned with reducing square footage to minimize rental costs, many facility managers are now looking to transform individual desk spaces into attractive collaboration areas.

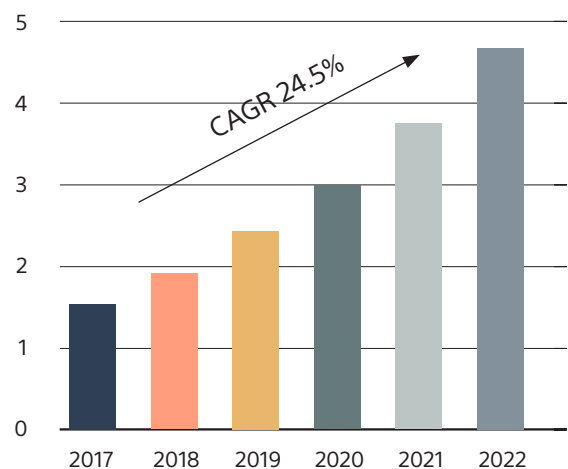
Getting the balance right is not easy, which is why many are turning to Occupancy Analytics tools for support. This trend is reflected in the rise of Occupancy Analytics & In-Building Location Based Services, a market which is growing by 24.5% per year. ^v

Global workplace experience apps market within commercial office space (MUSD)



Source: Global Market for Workplace Experience Apps 2020 - 2025* report from Research & Markets

Global occupancy analytics market (BnUSD)



Source: Occupancy Analytics & In-Building Location Based Services 2019 - 2024* from Research & Markets



How does Nimway fit in?

Introduced in 2017, Nimway is a comprehensive smart-office solution from Sony. From the start, its two main objectives were to improve the employees' everyday office experience and to help business owners optimize their use of space.

At that time, JLL's Global Occupancy Benchmarking Guide stated that 30-40% of all office space was underutilized on a typical workday. And, as the average cost per employee was \$12,000 in the US, that meant companies were wasting around \$4,000 per employee and year. There was clearly room for improvement.

While its two primary objectives have not changed, Nimway now includes more features to further enrich the workplace experience, and some which are specifically designed to facilitate hybrid working.

Desk booking

Staff can save time by using the Nimway app to book a desk before they leave home. If they're already at the office, they can find a free desk on the app or digital floorplan.

Space reservation

Nimway users can clearly see all the available rooms in the office. Meeting rooms and collaboration desks can be booked via the Nimway app, or the 'room panels' which are placed on the walls outside. They can book in advance or on the fly.

Wayfinding

Digital floorplans and the Nimway mobile app help users navigate the office in a simple and intuitive way.

Find a colleague

Users can easily locate colleagues within the office space. (Of course, employees can choose to hide their visibility when they don't want to be disturbed.)

Office access and parking

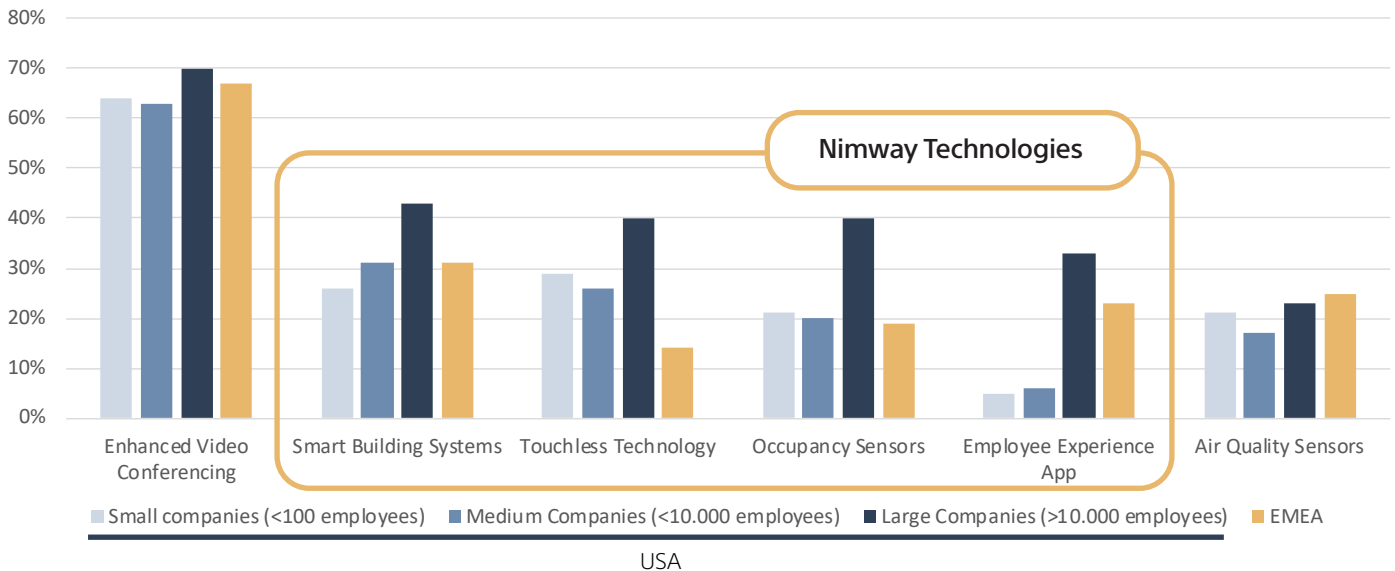
Employees can plan ahead and make sure they have access to the office and an available parking spot upon arrival.

Occupancy analytics

In the Nimway solution, sensors work in tandem with Sony's indoor positioning system to provide detailed occupancy that show e.g.:

- Which rooms or desks are used the most and when
- Which rooms are booked the most and when
- How much each seat is used and when
- The difference between bookings and usage

Based on this information, facility managers can make sure the office space is optimised to meet employees' real-world needs, as efficiently as possible.



Has the pendulum stopped swinging?

Thanks to the emergence of hybrid work and accompanying digital technologies, it seems we may have found a new, healthier equilibrium. Office staff are no longer condemned to bounce back and forth between open plan and enclosed offices spaces, but individuals can actually

choose the best location for the task in hand. And business owners can adapt their office layouts to inspire more creative collaboration, since *that*, we now understand is the main reason people go to the office.

Sources

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- The puzzle of motivation | Dan Pink - Bing video
- CBRE article 2021 Occupier Sentiment Survey
- Research from Randstad UK +: Think Hybrid, International Workplace Group, November 2021.
- <https://old.iwgplc.com/MediaCentre/Article/why-hybrid-working-will-help-deter-great-resignation>
- Occupancy Analytics & In-Building Location Based Services: Commercial Office Space 2019 to 2024



Nimway puts people in the centre

Curious to learn more?
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and get in touch!



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