

Working Life of the Future

– an annual report on office trends

2024



Contents

Summary 2

The role of the office 4

Social importance
Productivity and culture
Leadership
Health and well-being

Office environment and services 8

The importance of the office environment
Office solutions
Ergonomics and movement
Services and amenities

Office location 15

Importance of location
Surroundings
Accessibility
Parking

Flexibility 17

Importance of flexibility
Remote working
Gender equality
Guidelines

About the survey

The trend report Working Life of the Future is based on a survey carried out for Castellum by Axiom Insight.

4,031 office workers aged 18–65 took part in the survey, of which 2,018 from Sweden, 1,004 from Denmark and 1,009 from Finland.

All respondents are from Cint panels. The study was conducted during the period 4–16 October 2023.

Summary

Office attendance is continuing to rise, activity-based offices are booming and workplace satisfaction is steadily growing. The office is where our colleagues are, and where it's easiest to get our work done. At the same time, the possibility to work remotely is seen as increasingly important, and many find it hard to work undisturbed at the office. Workers are happiest in workplaces that encourage physical activity and movement, while many want to drive to the office. Welcome to office year 2024!

Working Life of the Future 2024 is the fifth edition of this annual trend report, which is based on a unique survey of Nordic office workers' expectations of working life and the office as a workplace. With this report, Castellum aims to provide facts and insights about the latest office trends in order to

help our tenants in Sweden, Denmark and Finland create sustainable workplaces where companies and employees can thrive and develop – now and in the future. But remember: each workplace is unique, just like the people who work there.



4 out of 5

are favourable to mandatory office attendance

12%

work remotely for most of their working hours



64%

more office workers have activity-based offices than last year

3 out of 10

say it can be difficult to work undisturbed at the office

8 out of 10

find the office environment crucial when choosing a new employer

41%

more respondents than last year say electric car charging facilities make the office more attractive



7 out of 10

managers believe that a high degree of office attendance is important to their leadership

The year's seven most important insights

This year's survey shows that offices serve an increasingly important function. However, it also shows that the winds of change are sweeping through the office landscape. Here are the seven most important office insights for 2024.

1. **Office attendance is continuing to rise.** Most workers want to work at the office most of the week. While only 1 in 10 now primarily work remotely, being able to choose has become more important.
2. **Flexible offices are increasingly popular.** Activity-based offices are rapidly increasing in number and popularity. The proportion of people who prefer activity-based offices has doubled since last year.
3. **Offices facilitate leadership.** 7 out of 10 managers believe that offices and high office attendance are important for their leadership. This is particularly important in large organisations.
4. **Good office environments attract more talent.** 8 out of 10 cite the office environment as an important factor when seeking a new job. And the better the work environment, the higher the attendance rate.
5. **Lack of opportunity to work undisturbed is the biggest challenge in offices.** The office environment fosters culture-building, collaboration and productivity. However, 3 out of 10 say it can be difficult to work undisturbed at the office.
6. **Offices are important to health.** 8 out of 10 young workers say the office is important for their mental health, and offices that encourage movement and physical activity generate higher employee satisfaction.
7. **Rising demand for sustainable commuting.** Accessibility by public transport is valued highly, but access to parking is at least as important. Meanwhile, demand for vehicle charging points is surging.

The office's role and importance

The role of the office is to help employees make an optimal contribution to their organisation's goals. Workers who are satisfied with their office from a professional, social and health perspective feel being at the office makes it easier to do their work. This year's survey shows yet again that offices are important for building corporate culture, facilitate leadership and contribute to better physical and mental health for the majority of office workers in the Nordic countries. It may seem obvious that being in an office makes it easier to do one's work. However, this year 45 percent more respondents than last year cited this as one of the main benefits of working in the office.

This year's report, Castellum's fifth, continues to show that colleagues are by far the main attraction of working in an office.

A significant majority of 58 percent said interacting with colleagues was the best thing about the office. This is particularly important for workers aged 55 and over.

Meeting colleagues is particularly important for Swedes, who rated it 17 percentage points higher than Danes. Non-managerial employees are over-represented in their appreciation of meeting colleagues (69 percent compared to 37 percent of CEOs and other senior managers).

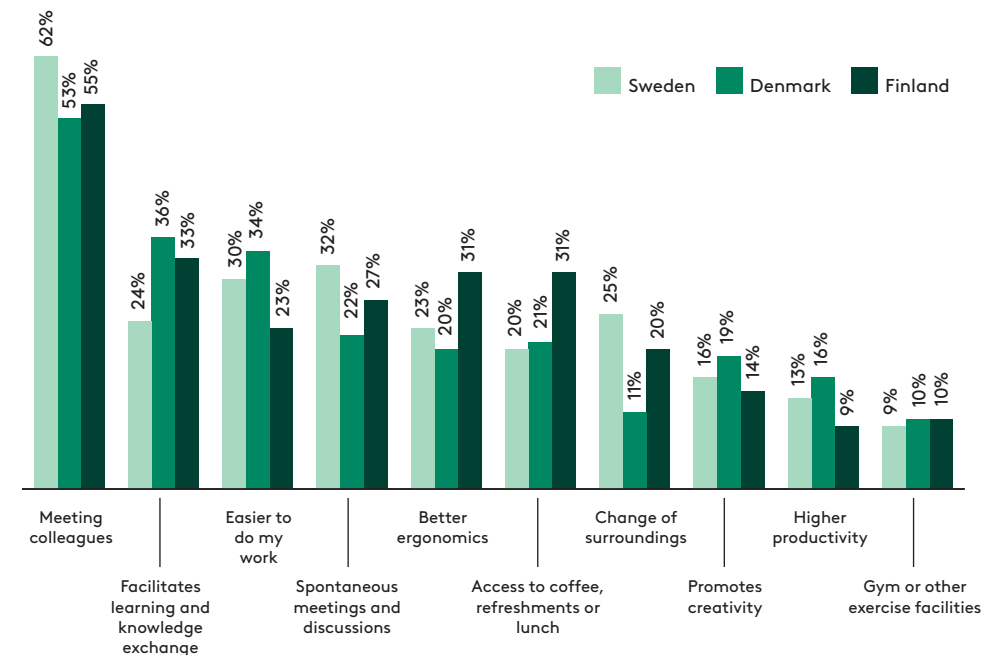
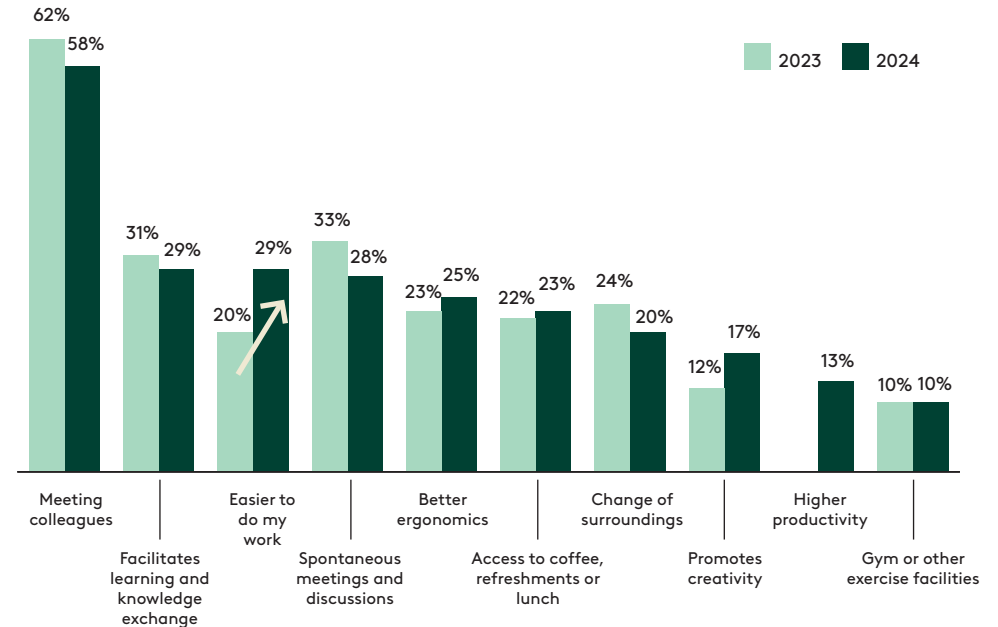
At large companies (250+ employees), 65 percent regard their colleagues as the best thing about the office, compared to 52 percent at companies with 10–49 employees.

Those who mainly work remotely also cited meeting colleagues as one of the best things about the office.

Colleagues may be the office's greatest attraction, but this year's biggest bombshell was the view that being at the office makes it easier to work. The proportion of respondents who said that being at the office makes it easier to do one's work was 45 percent higher this year, a significant increase on last year. It was primarily the youngest and oldest respondents who emphasised the office's role as a productive environment.

In the three surveyed countries, 34 percent of Danes found it easier to work in the office, compared with 23 percent of Finns and 30 percent of Swedes.

What do you feel are the greatest benefits of working at the office?



Social importance of offices continues to increase

71 percent of respondents feel the office is important for their social life, and those who rate the office as very important for their social life rose by an impressive 32 percent year on year.

Finland differed significantly from both Sweden and Denmark. 32 percent of Finns regard the workplace as fairly unimportant for their social life, compared to 18 percent of Danes.

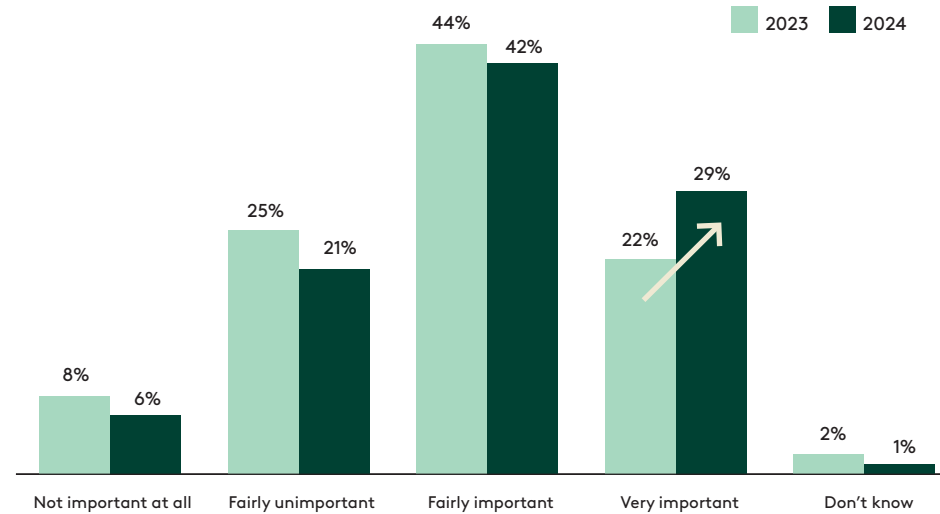
CEOs and other senior managers find the office particularly important for their social life.

80 percent of respondents find the office important for building and reinforcing a positive culture in the company where they work. Only 4 percent rated it as not important at all.

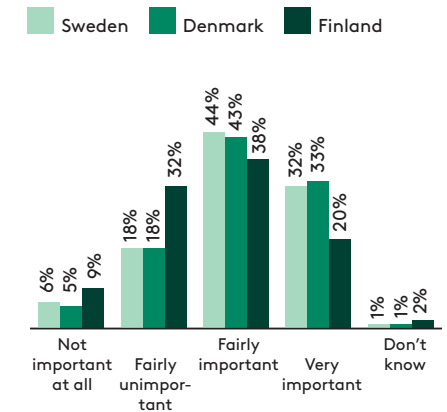
An increasing number of respondents see an important link between the office's attributes and the organisation's culture. Since 2023, the proportion who feel the office is very important in building a positive culture has risen by 27 percent.

The bigger the company, the more important the office's culture-building role is considered to be. At the largest companies (250+ employees), a total of 83 percent of respondents rate the office as fairly important (44 percent) or very important (39 percent) in building corporate culture.

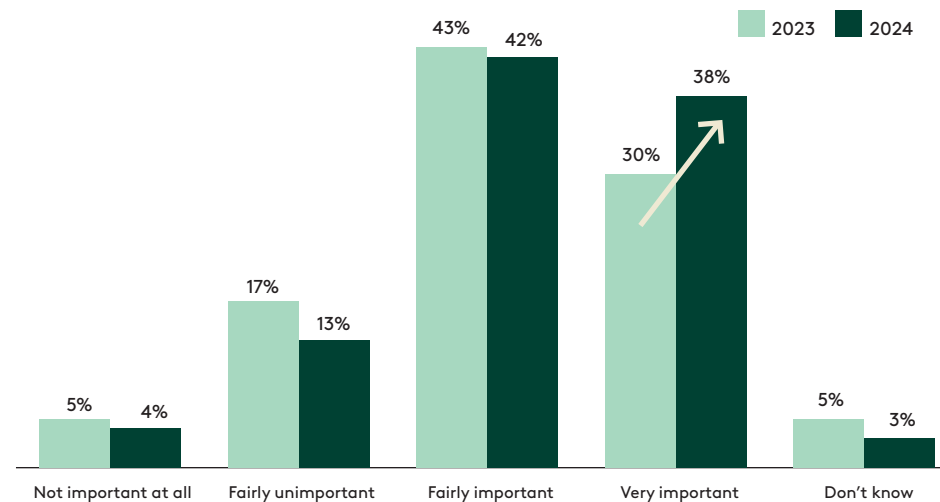
How important is the office for your social life?



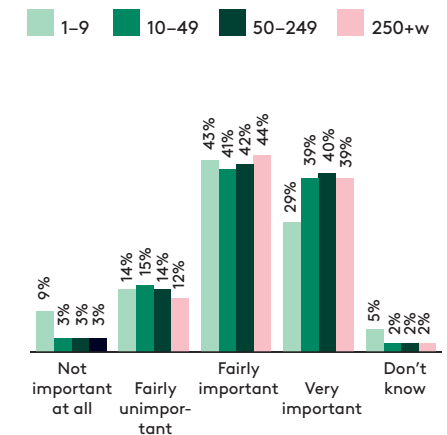
Distribution by country



How important is the office for building and reinforcing a positive culture at your company?



Number of employees



The office is important for both physical and mental health

Most people agree that the office is very important for our physical and mental health. This year's survey also shows that workplaces that encourage movement and physical activity have more satisfied employees.

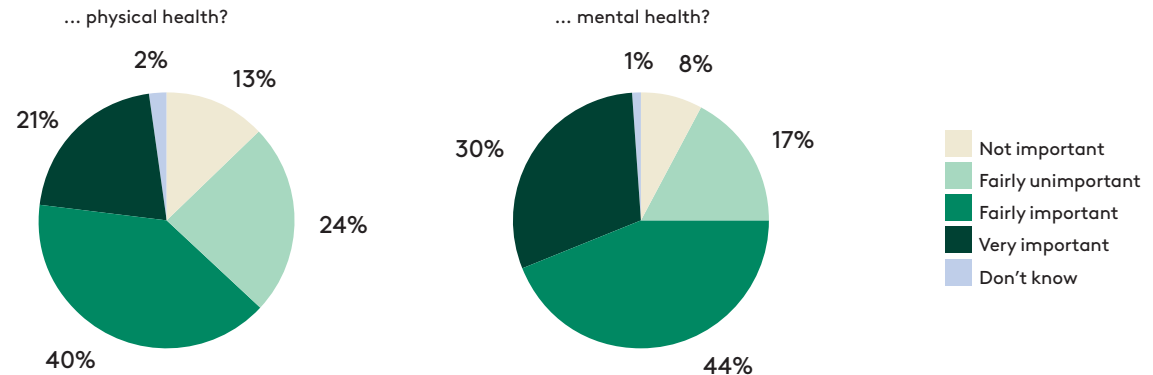
Older employees find the office most important for physical health, while younger employees find the office most important for mental health.

In total, 61 percent of respondents ranked the office as important or fairly important for their physical health, while 73 percent considered the office very or fairly important for their mental health.

8 out of 10

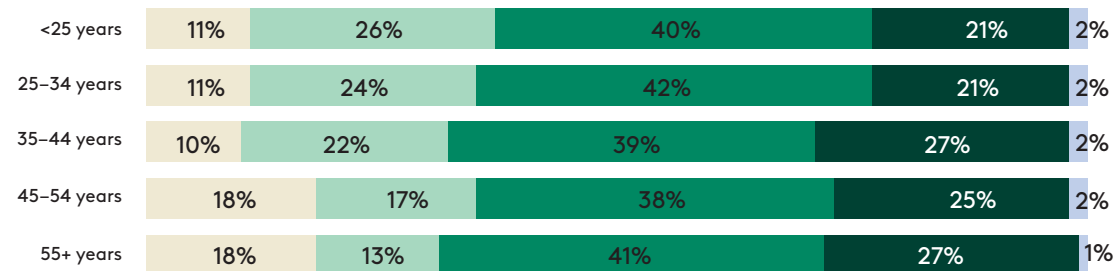
young workers find the office important for their mental health

How important is the office for your ...



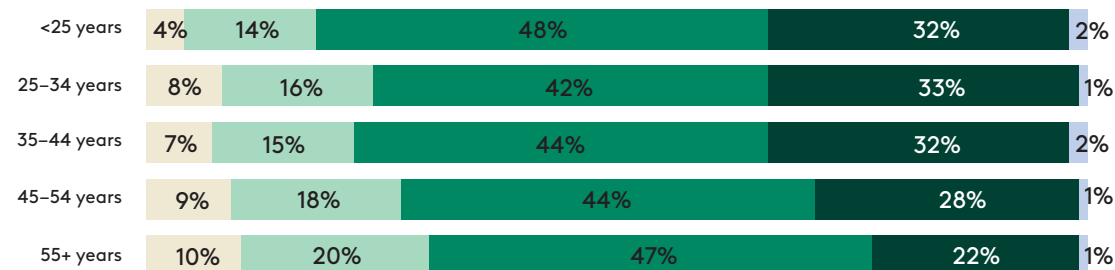
How important is the office for your physical health

Distribution by age group



How important is the office for your mental health

Distribution by age group



7 out of 10 managers feel that offices facilitate leadership

One question was only put to managers: In your leadership, is it important to have a high degree of staff attendance at the office? 6 percent of managers felt that in principle, it was fine for employees to work anywhere. However, a vast majority of 73 percent wanted their staff to be present at the office as often as possible.

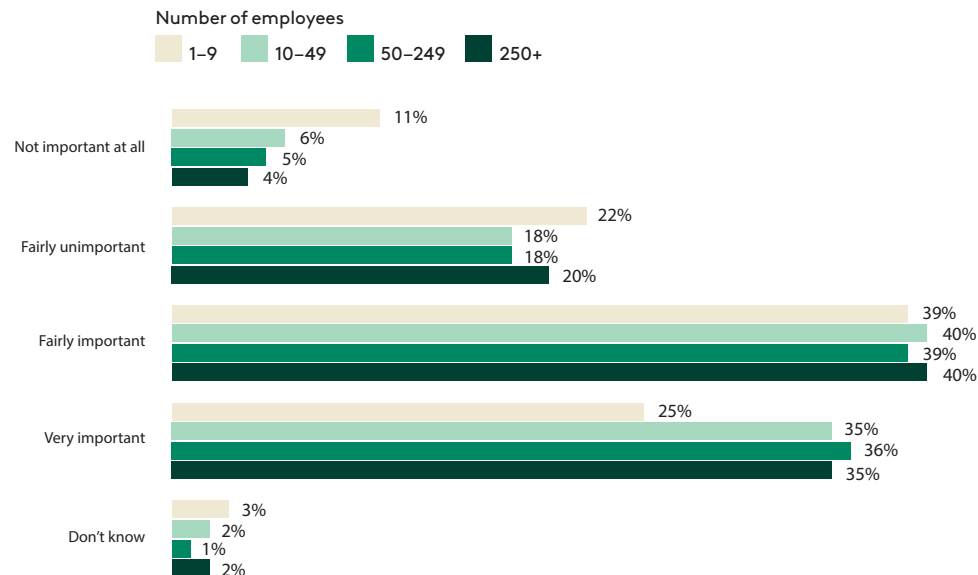
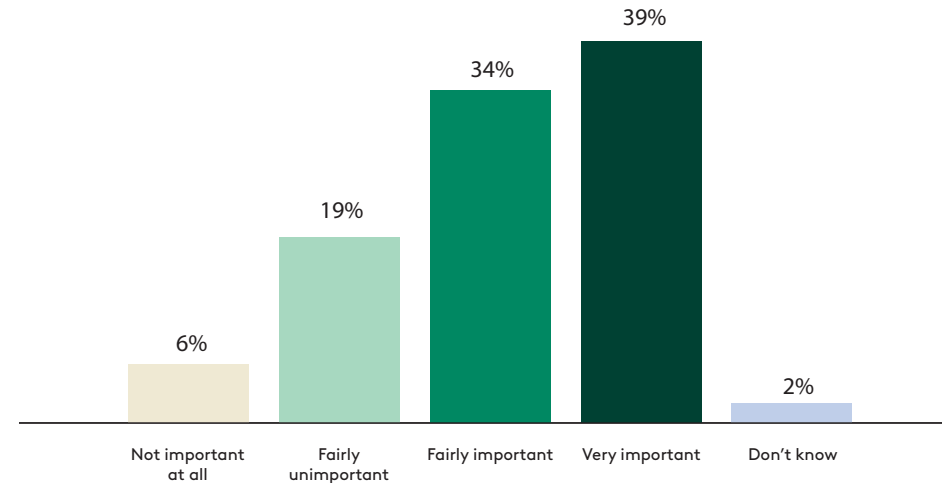
The survey also showed that the larger the organisation, the more important managers considered office attendance to be.

A somewhat future-oriented question was also included in this year's survey: How would you feel about your manager being replaced with an AI manager in future? One in four employees said they were positive to this. The managers themselves were the most positive. Almost half (45 percent) of senior managers welcomed the idea.

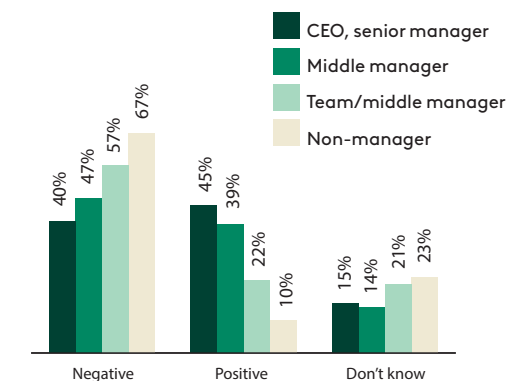
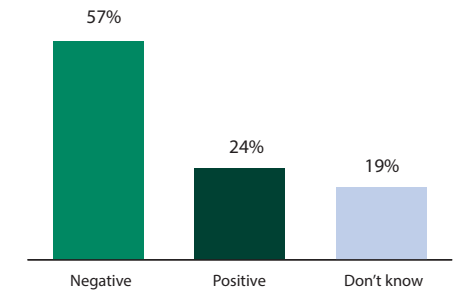
73%

of managers consider high attendance important or fairly important

In your leadership, is it important to have a high degree of staff attendance at the office?



How would you feel about your manager being replaced with an AI manager in future?



Office environment and services

The office environment is a strong factor in both retaining employees and attracting new talent. The office's design is an important factor when choosing an employer, particularly for young age groups. Activity-based offices are booming, and this type of workspace results in higher work environment satisfaction. The greatest deficiency of today's offices is that it's difficult to work undisturbed.

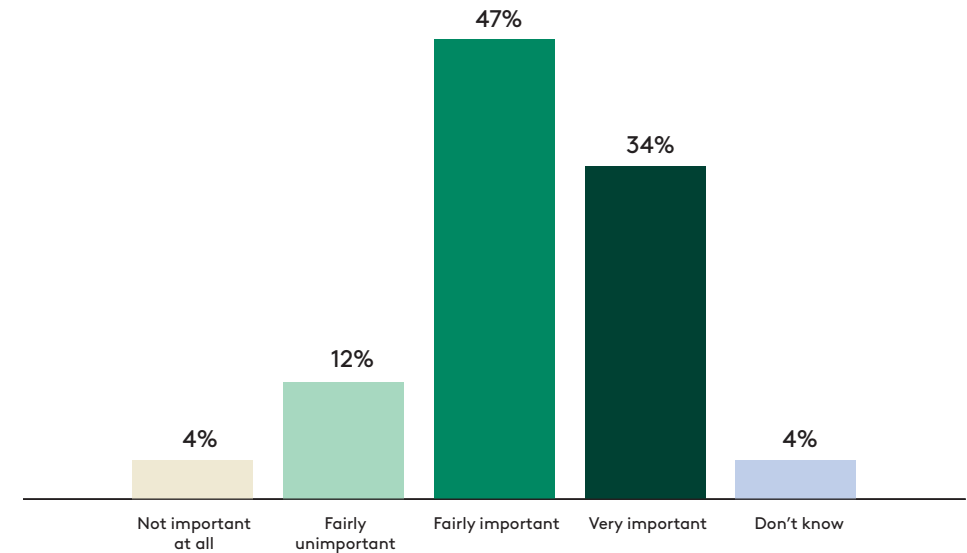
The pay is decent, your colleagues seem fun, the company seems good – but what about the office?

This question is highly relevant to someone seeking new professional and career opportunities. This is clear from this year's survey, in which roughly 80 percent of respondents found the

office environment important when choosing a new employer. Employees who mainly work remotely also find the office environment an important factor when considering a change of employer.

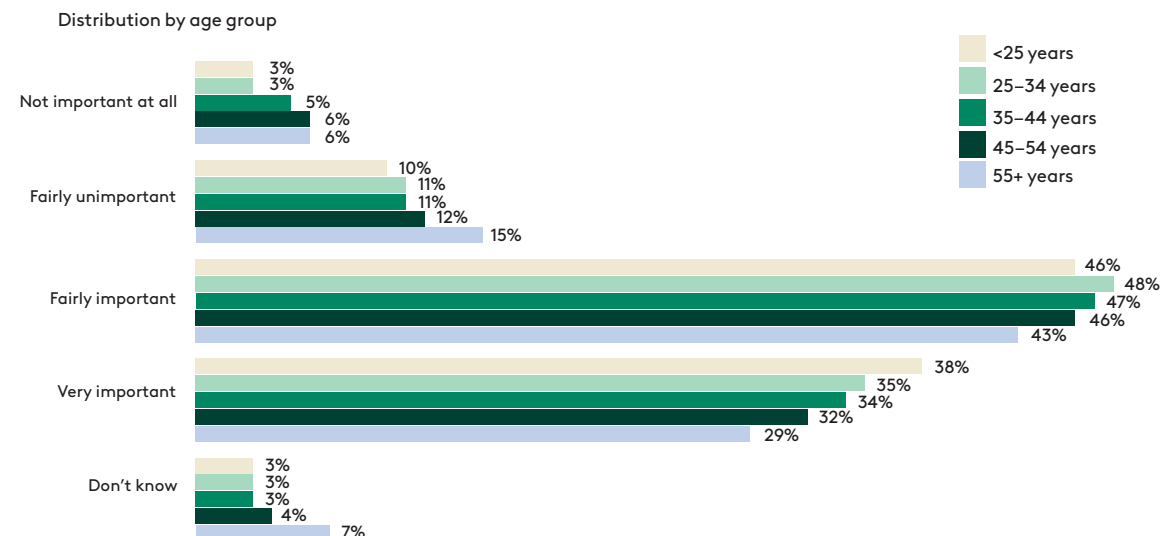
Younger employees find the office environment most important.

How important do you find the office environment when choosing an employer?



81%

find the office environment fairly or very important when choosing a workplace



A good office environment results in higher office attendance

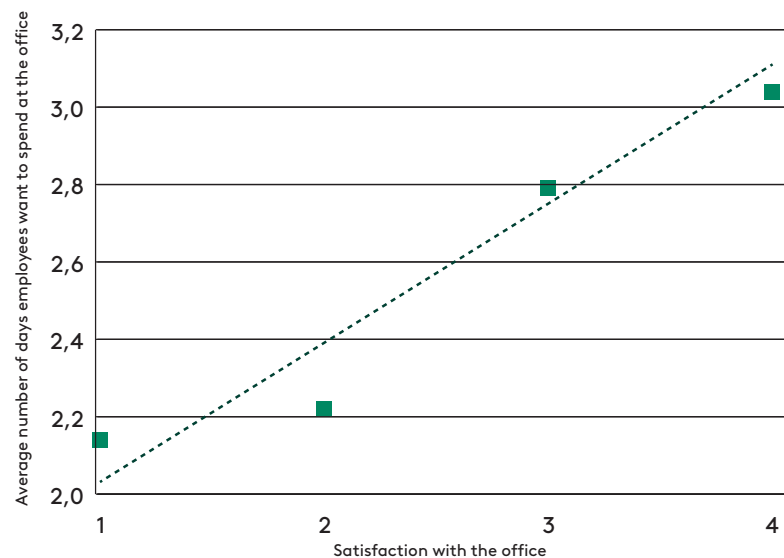
Workers who are satisfied with their office environment want to spend more time at the office. The number of respondents who want to work at the office most of the week is higher in this year's than in the previous two years' surveys. However, fewer respondents want to work at the office all the time. Of the three Nordic countries surveyed, Danes are keenest on office working, while Finns continue to embrace the freedom of remote working.

In all countries, the most popular preference was to work at the office three days a week, a slight increase on the previous year.

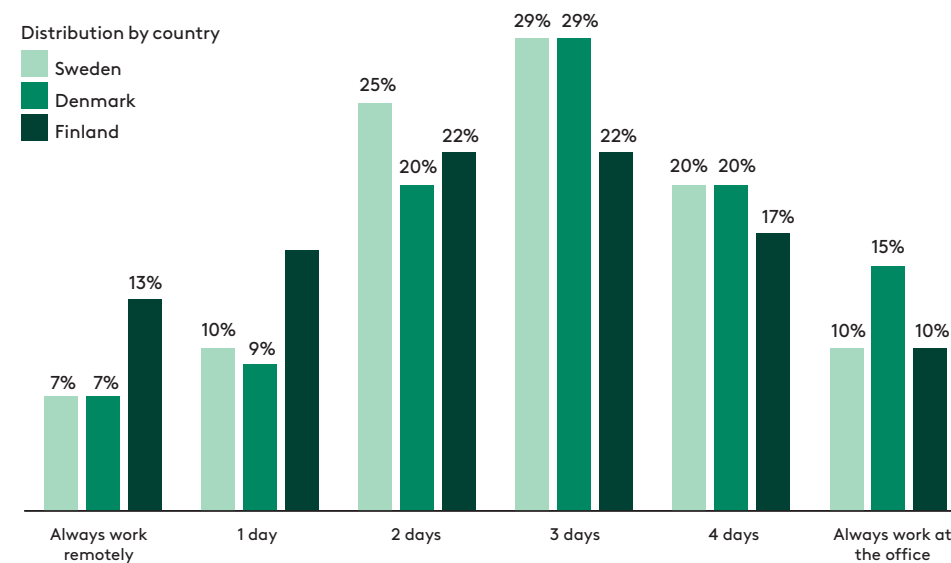
As in previous reports, younger respondents want to spend the most time at the office. However, the younger workers also value freedom of choice the highest. Read more about this in the section on flexibility on page 18.



Correlation between satisfaction with the office environment and preferred number of days at the office



In the future, how many days would you like to work at the office in a normal working week?



Big upswing for activity-based offices

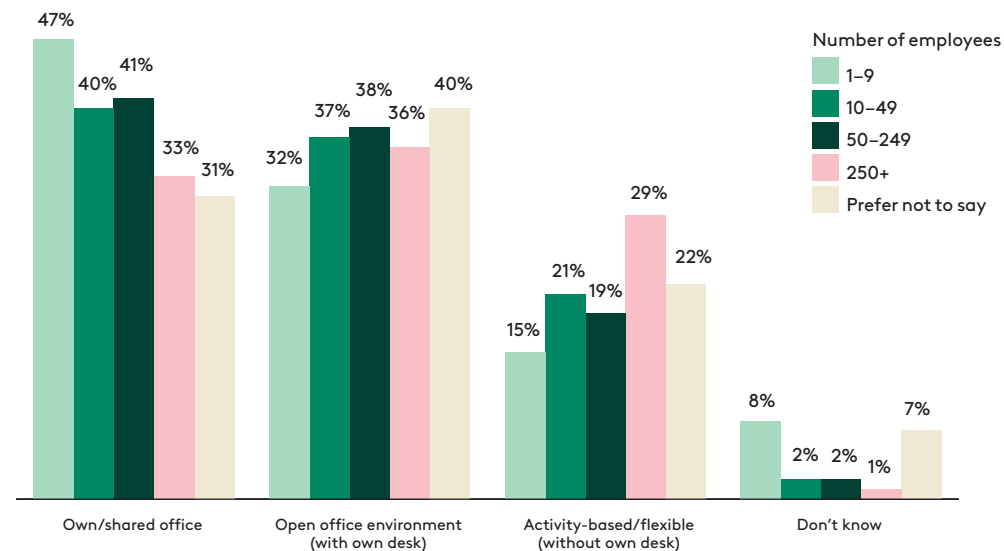
Compared to the 2023 survey, the number of office workers in activity-based offices (no fixed work station) has increased by more than 60 percent. If given the choice, office workers are also less keen to have an office of their own, and the proportion who prefer activity-based working was a hefty 100 percent up from the previous year.

It is primarily larger organisations that are investing more in open office environments and activity-based offices. At companies with 250+ employees, 65 percent of office

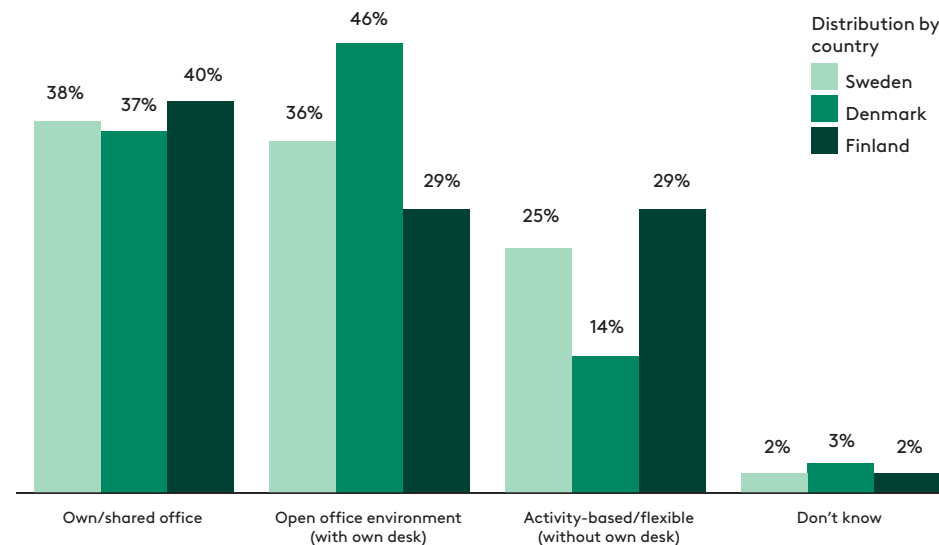
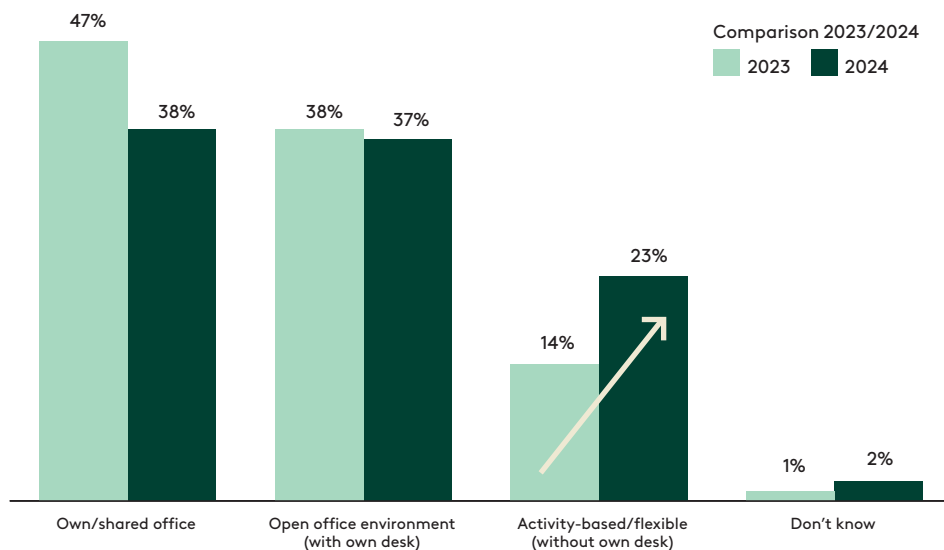
workers have open office environments or activity-based offices.

As last year, Denmark had the highest number of respondents working in open office environments. Half of the Danish office workers work in open office environments with their own desk, and this is also the type of office that Danes prefer if given the choice. In Finland, one in three office workers already work in activity-based offices, and Finland is also the country with the highest preference for this office type.

What type of office does your employer offer?



What type of office does your employer offer?

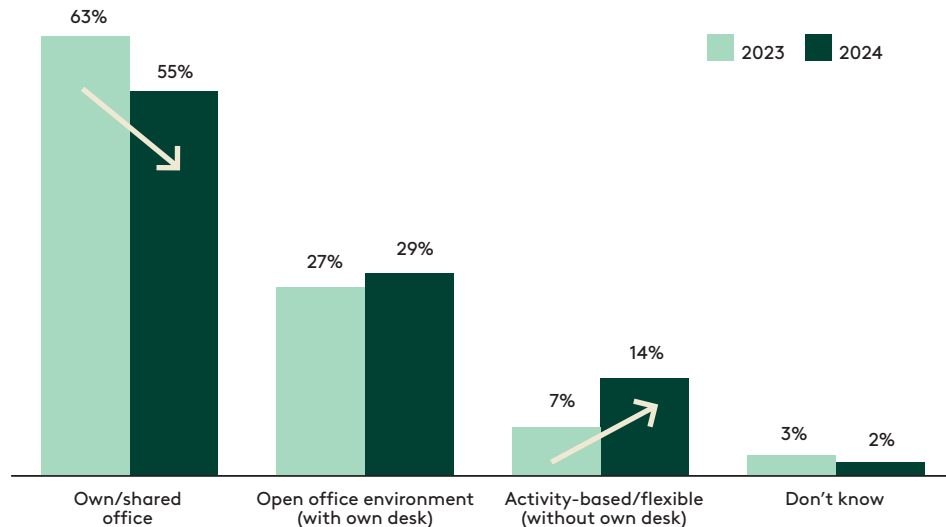


Individual office or open office environment – a generational preference

Nearly 70 percent of senior office workers (+55 years) want an office on their own or a shared office, while only 7 percent of the older age group want activity-based working. Respondents aged 34 or younger are significantly less interested in having their own office, and have a greater preference than their older colleagues for open office environments and/or activity-based offices.

Those with the least interest in having their own office are senior and middle managers, who are also more positive to activity-based working. Those keenest to have their own office are non-managerial employees (60 percent). Of remote workers, 61 percent prefer an office on their own or shared with one person.

If given the choice, what type of office environment do you prefer?



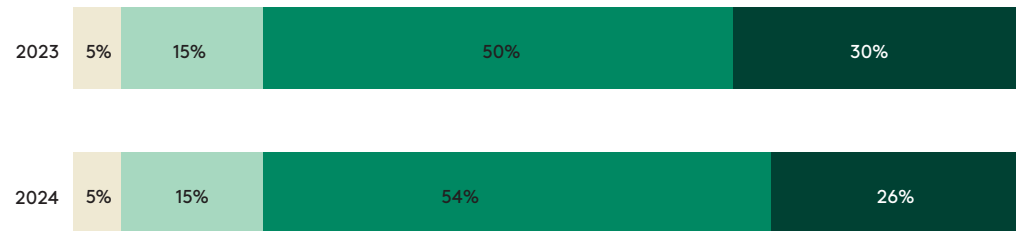
A growing number of remote workers are dissatisfied with their work environment

3 out of 4 respondents are satisfied with their current work environment, both at the office and when working remotely. Only 5 percent rated their office as very bad. These figures are on a par with the previous year.

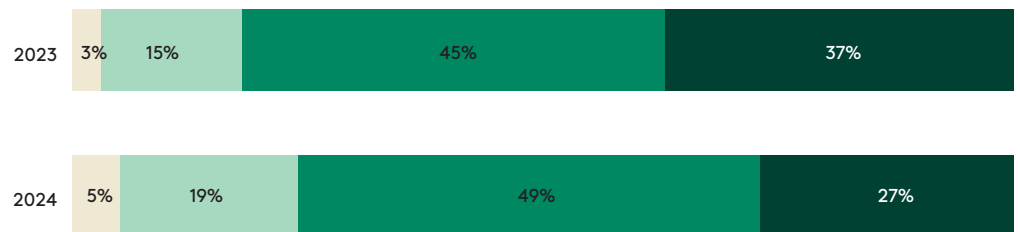
On the other hand, this year's survey indicates less satisfaction with the remote work environment than the previous year. Respondents rating their primary remote work environment (home, in most cases) as bad has increased by 33 percent since 2023.

What is your overall opinion of your current work environment ...

... at the office



... at your remote workplace



Very bad Bad Good Very good



32%

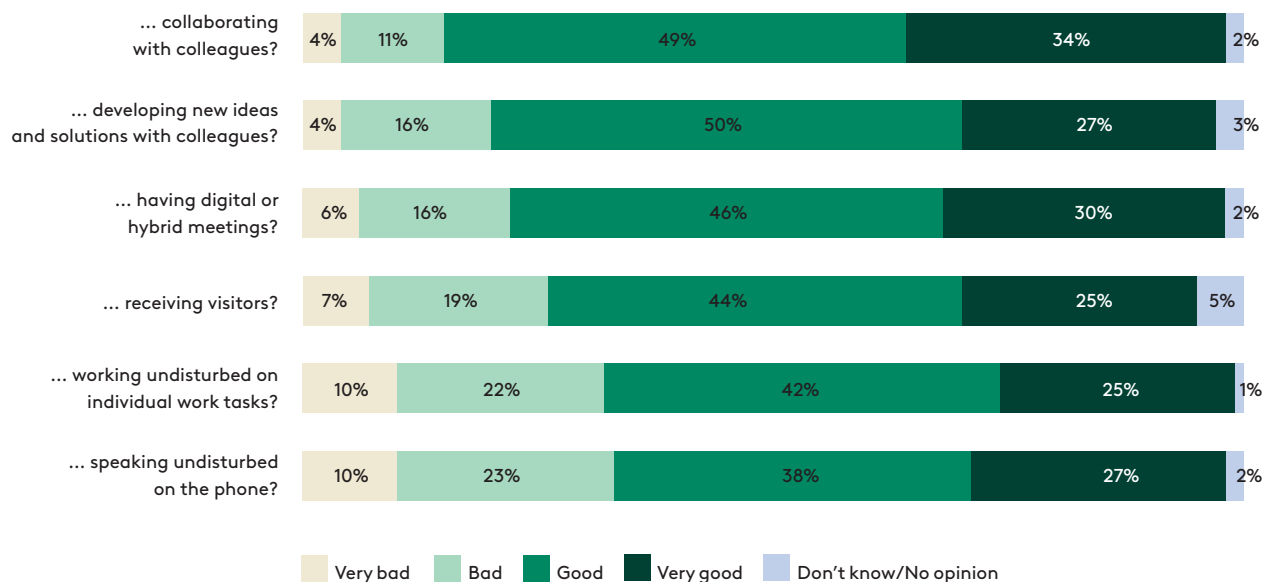
find it hard to focus on their work at the office

Lack of opportunity to work undisturbed is the biggest challenge

Overall, the office received high ratings for collaboration, and for developing new ideas and solutions with colleagues. The most positive respondents were those who primarily work in offices. However, the majority of respondents who primarily work remotely felt the same.

Many respondents (over 30 percent) found it difficult to focus on their work or speak undisturbed on the phone at the office. Disturbance is clearly the biggest drawback of offices.

How well does your office meet your needs for ...





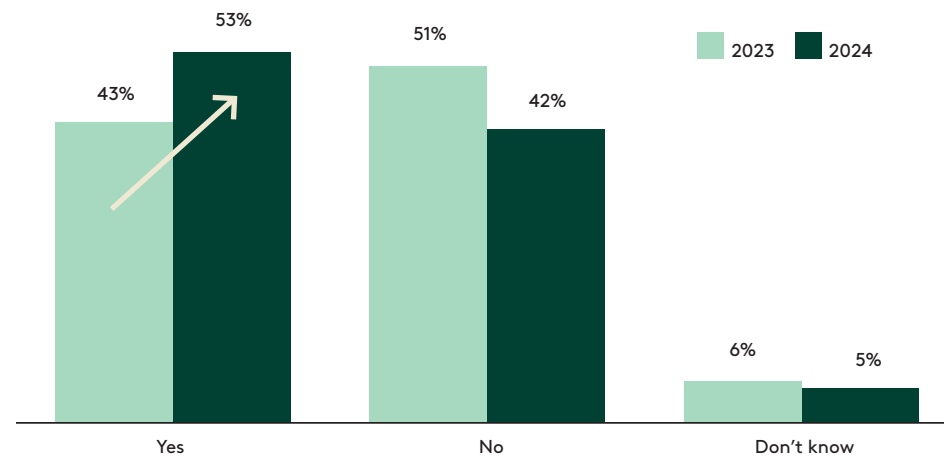
Offices that encourage movement have more satisfied employees

Office work is seldom physically demanding, and many people are sedentary for most or part of their working day. In recent years, more and more companies have realised the importance of a workplaces that encourage physical activity. In this year's survey, over half of the respondents reported working in an office that encourages

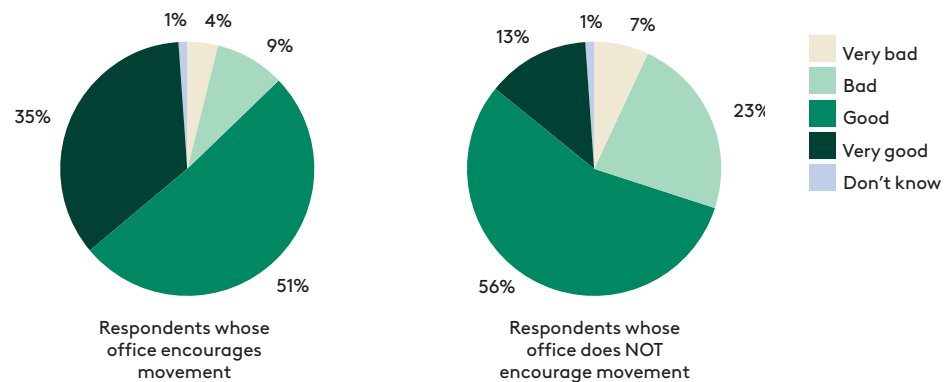
physical activity – an increase of more than 23 percent on the previous year.

Greater opportunity for physical activity at the office also results in greater workplace satisfaction. 86 percent of workers who are encouraged to be physically active at the office are satisfied with their work environment.

Does your office encourage movement and physical activity?



What is your overall opinion of your current office environment?



7 of 10 are favourable to coworking

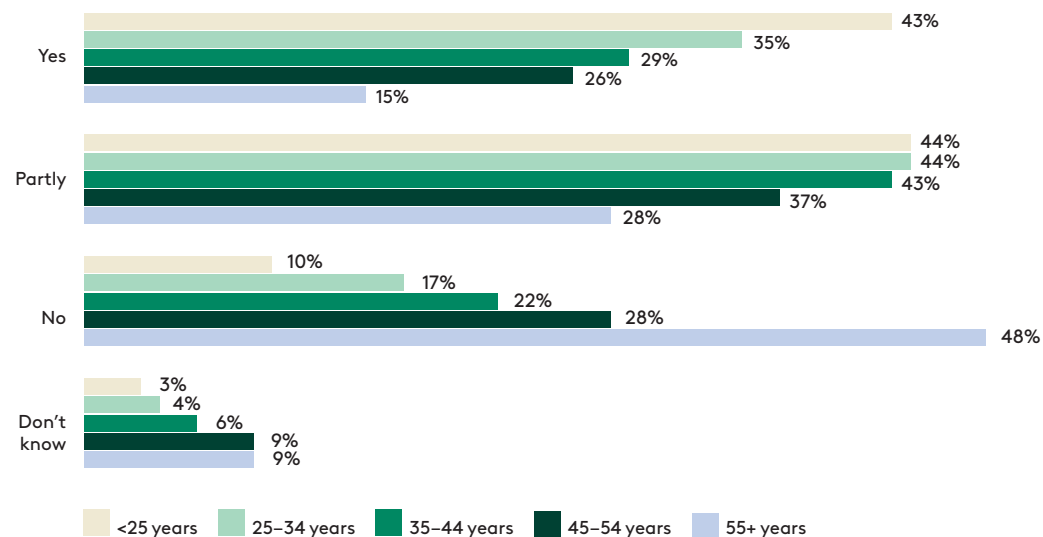
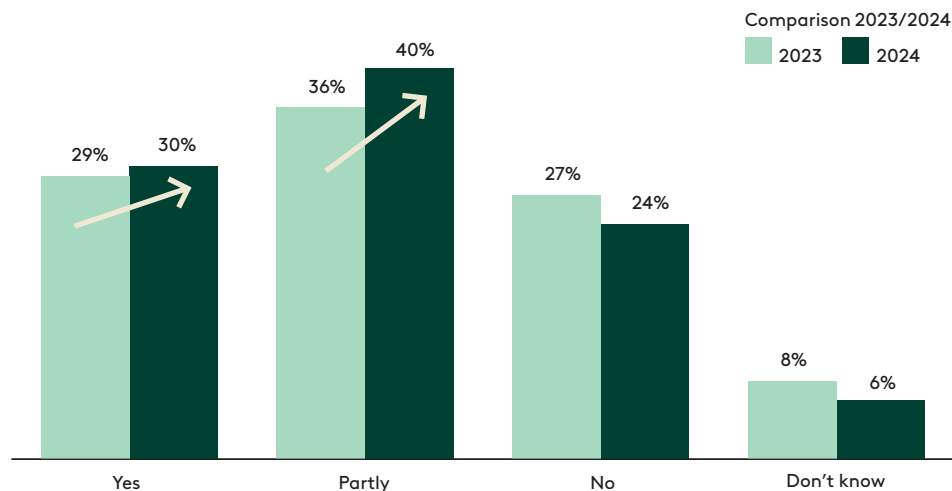
In a coworking space, the member companies share work stations, meeting rooms, reception, lounge and services, and are part of a social community. The survey shows that there is still a certain lack of knowledge about coworking, although awareness is steadily increasing. Since 2023, the proportion of respondents familiar with the concept of coworking has increased by almost 20 percent.

With greater knowledge comes greater curiosity. 7 out of 10 respondents would consider exclusively or partly working in a coworking space, which is an increase on last year.

Non-managers are most sceptical, while 87 percent of CEOs and senior managers would consider working exclusively or partly in a coworking space. Employees aged under 25 are very positive, with 43 percent open to working exclusively in a coworking space. The corresponding figure for respondents aged 55+ is only 15 percent. Of respondents who mainly work remotely, 35 percent are directly negative to working in a coworking space.



Would you like to work in a coworking space?



Big and large items on office workers' wish list

Every year, the respondents in the survey Working Life of the Future are asked to choose the service and facilities they think would make their office more attractive to work at.

After this, we sort the preferences into three main categories: services, well-being and mobility. The latter category is reported on in the next section, which regards office location.

Car parking topped the list again this year, closely followed, ironically, by health and wellness activities and gym. Demand for vehicle charging points and bicycle parking rocketed this year, while interest in a restaurant or cafeteria slumped.

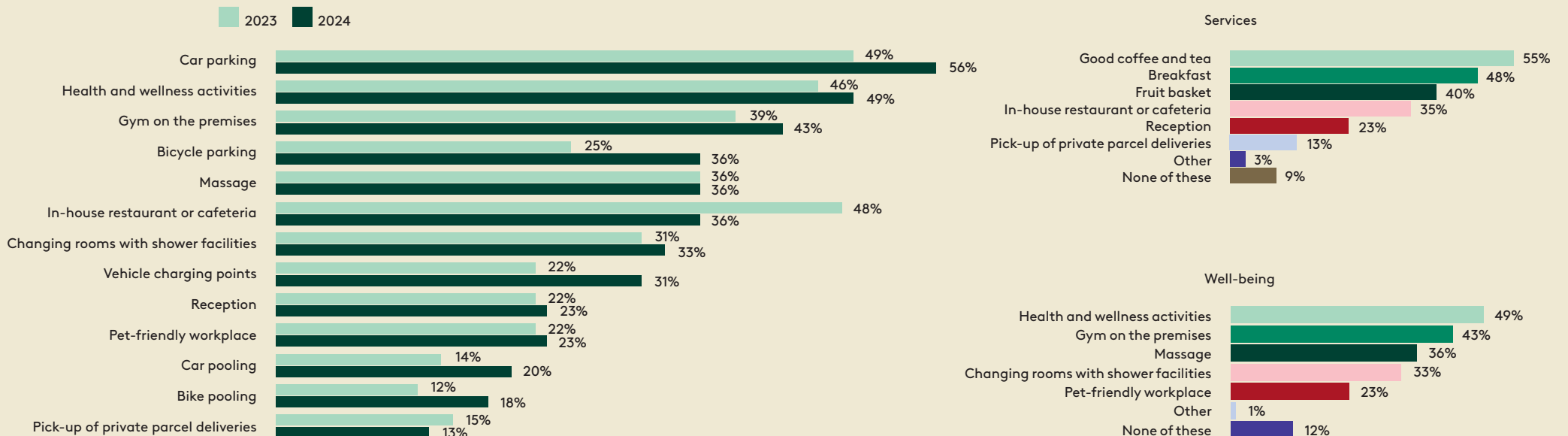
Top wish list, services:

1. Good coffee and tea
2. Breakfast
3. Fruit basket
4. In-house restaurant or cafeteria
5. Reception

Top wish list, well-being:

1. Health and wellness activities
2. Gym on the premises
3. Massage
4. Changing rooms with shower facilities
5. Pet-friendly workplace

In your opinion, which of the following facilities makes the office a more attractive workplace?



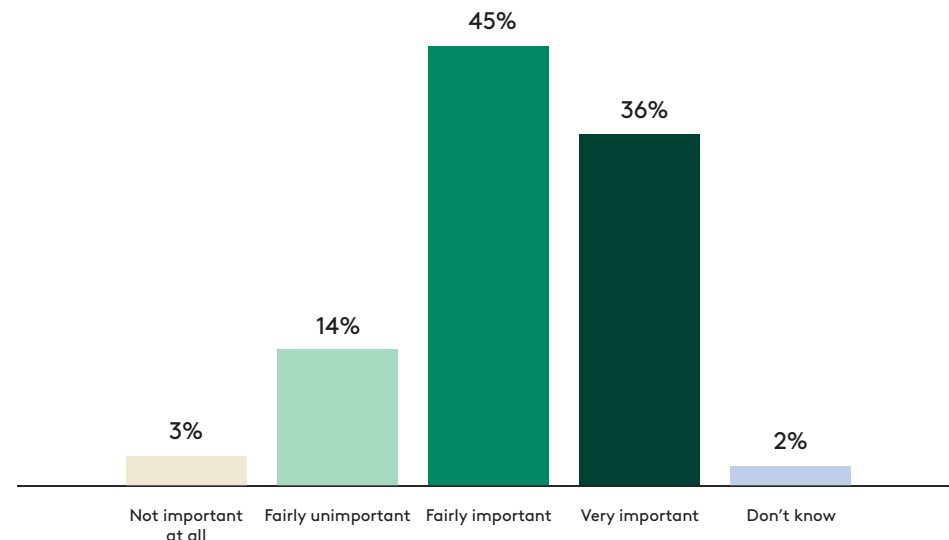
Office location and accessibility

Do you like your location? The answer varies depending on who you ask and what aspects are referred to. In purely geographical terms, most people want their office to be close to their home and, to an increasing extent, to shops, services and exercise facilities. Proximity to public transport is ranked highly, while accessibility by car has decreased in importance. Demand for sustainable transport is booming: vehicle charging points, car pooling, e-bikes. Are workplaces ready for this rapid transition?

Location, location, location, as the saying goes. And of course office location is an important factor, not least for those looking to change employers. More than 8 out of 10 respondents state that the

location of their new office is important. As regards those who primarily work remotely, 7 out of 10 find the office an important factor when choosing an employer.

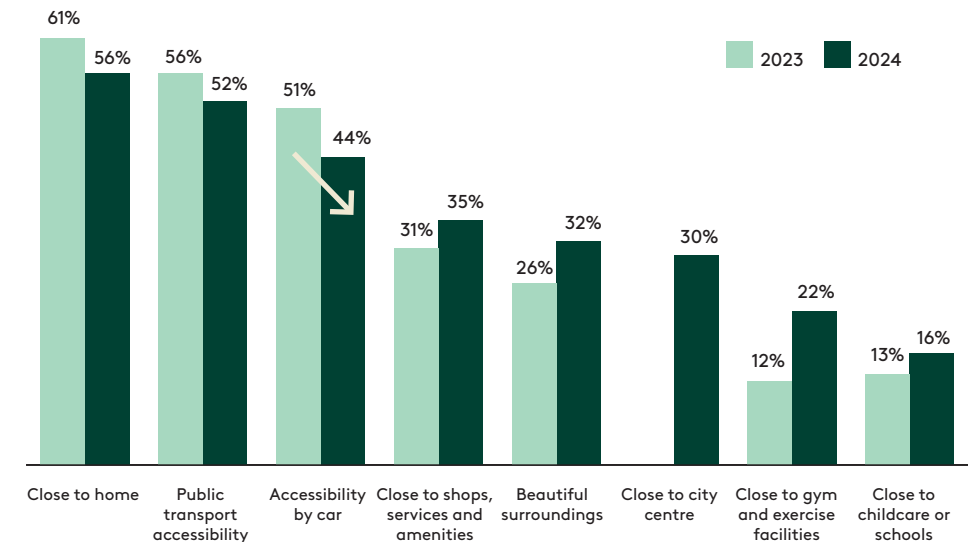
How important is the office's location when choosing an employer?



The exact criteria for a good location varies from individual to individual. This year's survey points to several important criteria for a workplace to be considered to have a good geographic location. The main criteria are to do with proximity and accessibility – for example that the office should be close to one's home or accessible by public transport. However, accessibility by car is less important than last year, while parking is seen as increasingly important. This year's survey also indicates greater demand than last year for proximity to shops, services and exercise facilities. However, only one in three office workers find it important for the office to be in or near the city centre.

Respondents in Sweden, Denmark, and Finland have similar preferences regarding location, proximity to home, accessibility by car and public transport. Danes find proximity to shops and services less important, while Finns continue to rank beautiful surroundings more highly than the respondents in the neighbouring countries. Good public transport access is valued especially highly in Stockholm and Helsinki. Responses to the open-ended questions also show that the cycling distance to the workplace is important.

Which of the following attributes do you find important in order for your workplace to have a good location?



Car parking is desirable, while demand is surging for vehicle charging points

The current transition in mobility and transport is also reflected in this year's survey. Transport-related facilities such as car and bicycle parking, vehicle charging points, car pooling and bike pooling have become more important in determining an office's attractiveness.

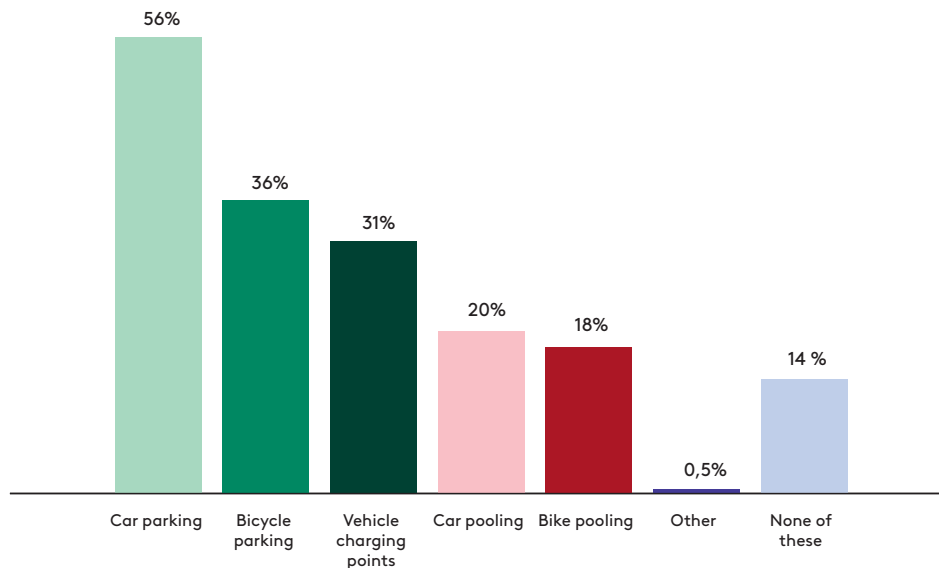
Car parking still tops the wish list, with a rise from 49 to 56 percent. The larger the company, the more important parking is considered. There is no significant difference between the respondents' age groups, or between towns and cities of different sizes. Finland is the only

country where car parking is deemed less important than good coffee or tea.

In other words, many people still want to drive to the office. However, the biggest changes in views regarding office accessibility are to do with sustainable transport, either by bicycle or electric car or through car or bike pooling.

Demand for electric vehicle charging points rose by 41 percentage points in this year's survey. Demand for bicycle parking is up 44 percent.

In your opinion, which of the following facilities makes the office a more attractive workplace?



41%

higher demand for vehicle charging points than last year

Top wish list, mobility:

1. Car parking
2. Bicycle parking
3. Vehicle charging points
4. Car pooling
5. Bike pooling



Flexibility and remote working

Flexible working got a kick start when the pandemic turned everything upside down in early 2020. The experiment has now become standard, with remote or hybrid working the new normal for many. However, this year's survey shows that workers are increasingly returning to the office, and that the benefits of remote working are rated less highly. A majority say they would accept mandatory office attendance, while the opportunity to work remotely is in growing demand.

44 percent see the opportunity to work remotely as crucial when choosing an employer. This figure has risen significantly since the 2023 survey. Of those who already mainly work remotely,

94 percent see the opportunity to work remotely as a completely or partially determining factor when choosing an employer.

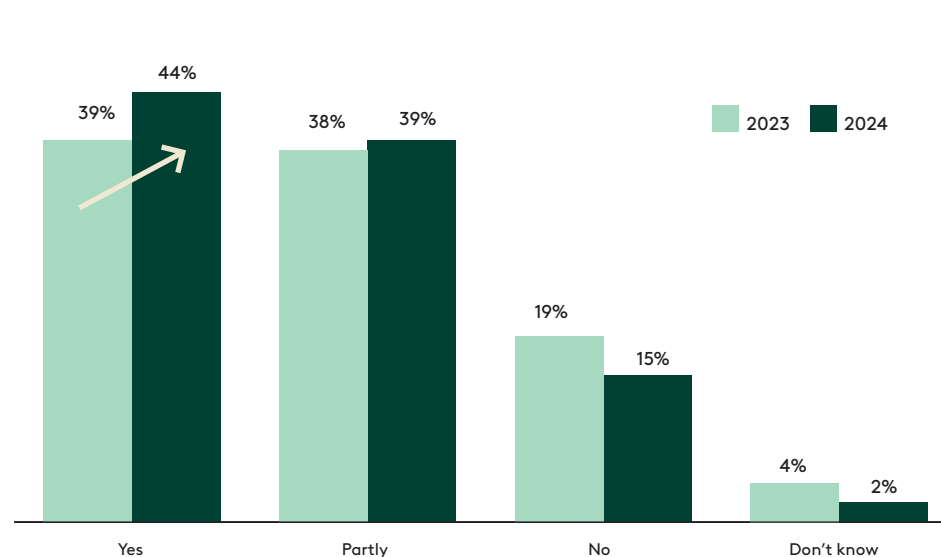
Middle-aged respondents were most interested in the opportunity to work remotely. Half (47 percent) of respondents answered 'yes' when asked if the opportunity to work remotely would be a determining factor when choosing an employer. The youngest office workers

44%

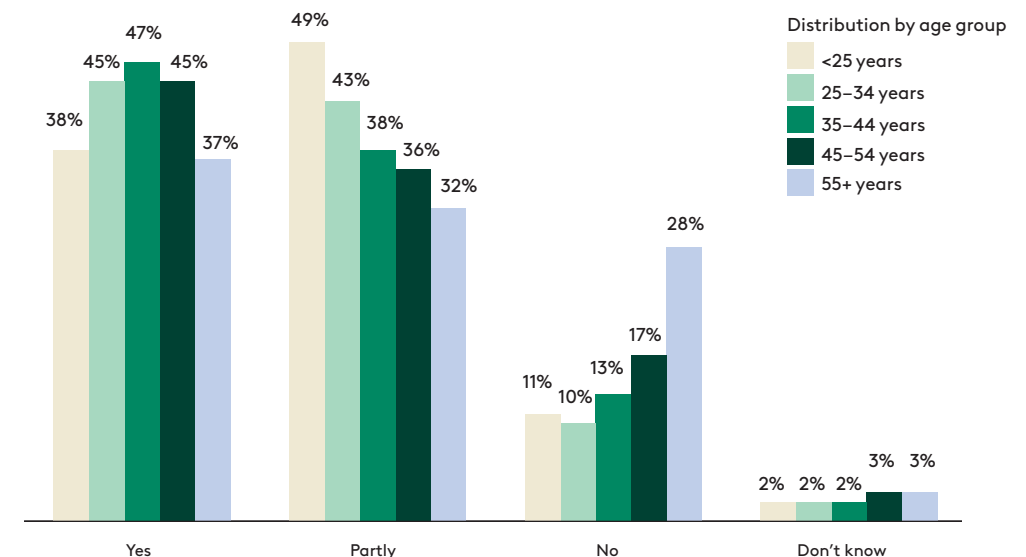
see the opportunity to work remotely as crucial when choosing an employer.

(<25 years) were most likely to answer 'partly' to the same question, while the predominant response from seniors (+55) was that the opportunity to work remotely would not affect their choice of employer. One in three seniors answered 'No'.

Would the opportunity to work remotely be a determining factor for you when choosing an employer?



Would the opportunity to work remotely be a determining factor for you when choosing an employer (shown by age)?



Only 1 in 10 mainly work remotely

The results show clear differences between respondents who mainly work at the office and those who mainly work remotely. More than half (54 percent) currently state that they mainly work at the office, while only one in ten (12 percent) mainly work remotely. 35 percent say their working hours are fairly evenly divided between the office and their remote workplace.

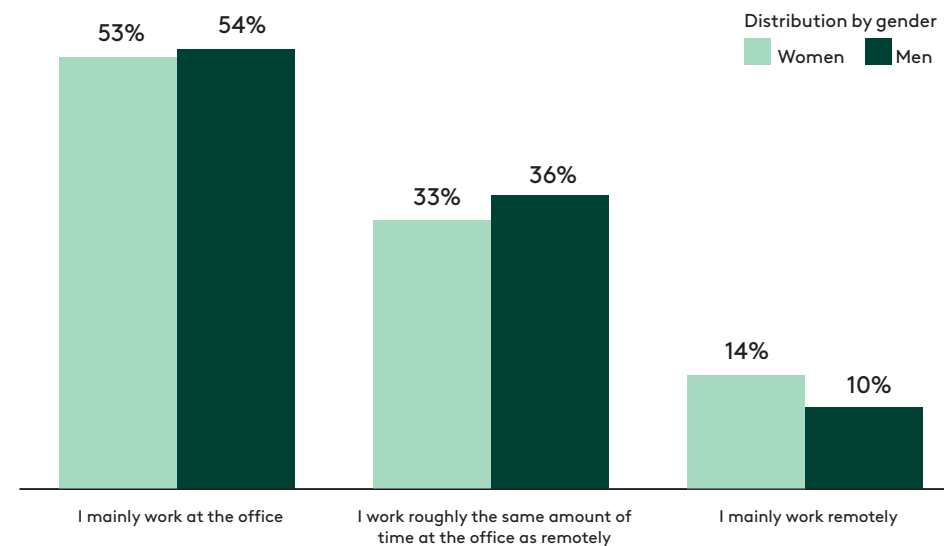
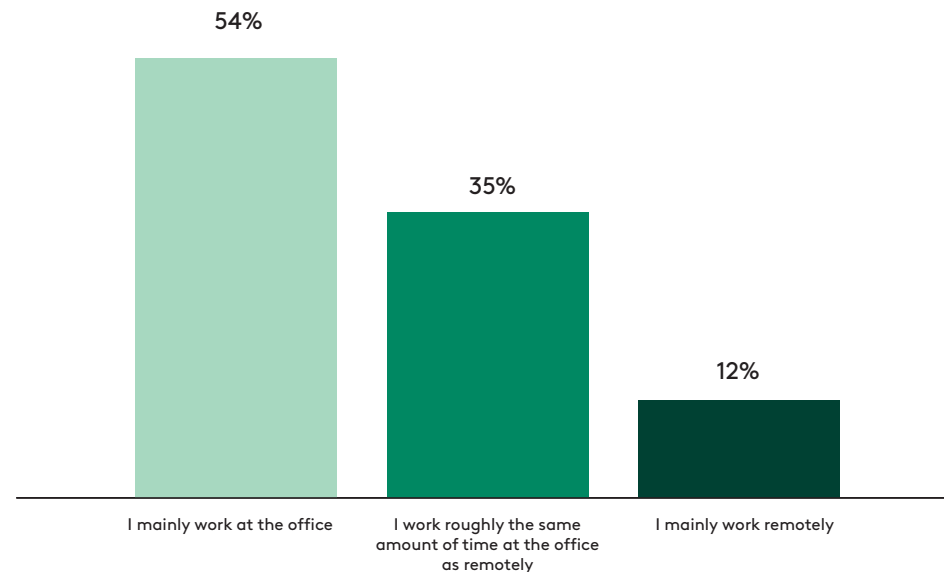
As last year, men and women were fairly evenly distributed in terms of their preferred type of workplace. However, slightly more women than men would prefer to mainly work remotely. On the other hand, the results show that women feel they have less right than men to decide how often they to work in the office. See more information about this on page 21.



54%

primarily work at the office

What is your primary workplace at present?



The benefits of remote working have decreased

How does remote working affect factors such as collaboration, innovation, well-being and individual productivity at work? This year's survey shows a decline since 2023 in the degree to which respondents feel that remote working affects their collaboration with colleagues, their individual productivity and their well-being.

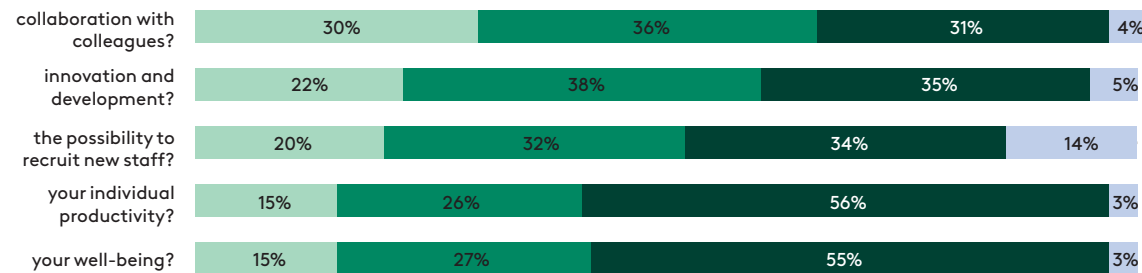
Remote working negatively affects collaboration, while the figures for productivity and well-being also declined year on year.

Last year, 65 percent of respondents felt that remote working improved their individual productivity. This figure dropped to 58 percent in 2024.

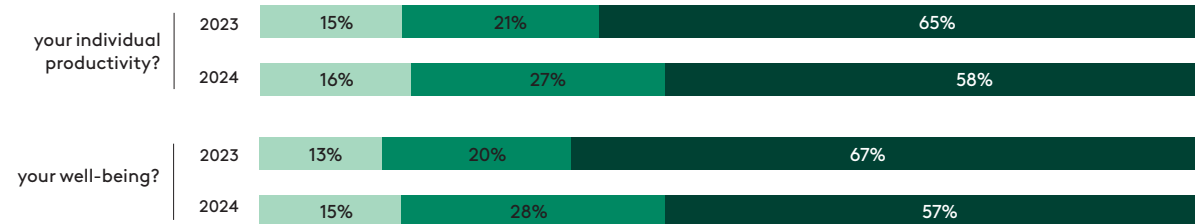
In the 2023 survey, 67 percent of respondents felt that remote working improved their well-being. This year's corresponding figure was 57 percent, a 15 percent decline.

Views on the effects of remote working vary markedly depending on the respondent's own work situation. Respondents who primarily work in the office were significantly more likely to feel that collaboration is impaired by remote working than respondents who work remotely.

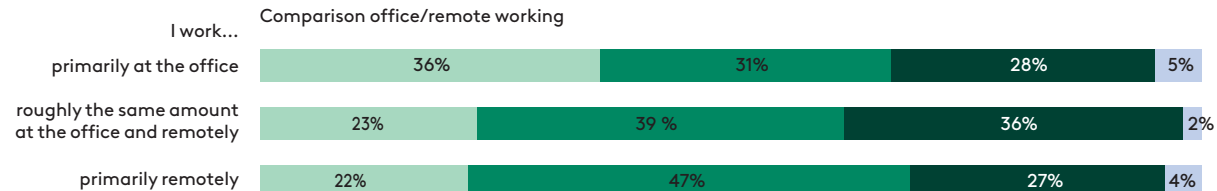
How do you feel that working remotely affects...?



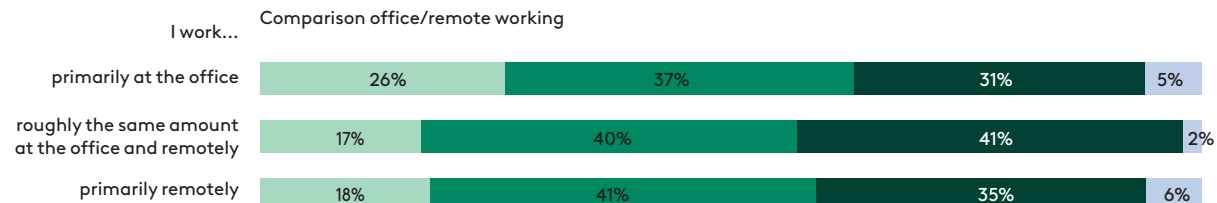
Comparison 2023/2024



In what way do you feel that remote working affects collaboration with colleagues?



In what way do you feel that remote working affects innovation and development?



■ Negatively
 ■ No difference
 ■ Positively
 ■ Don't know/No opinion

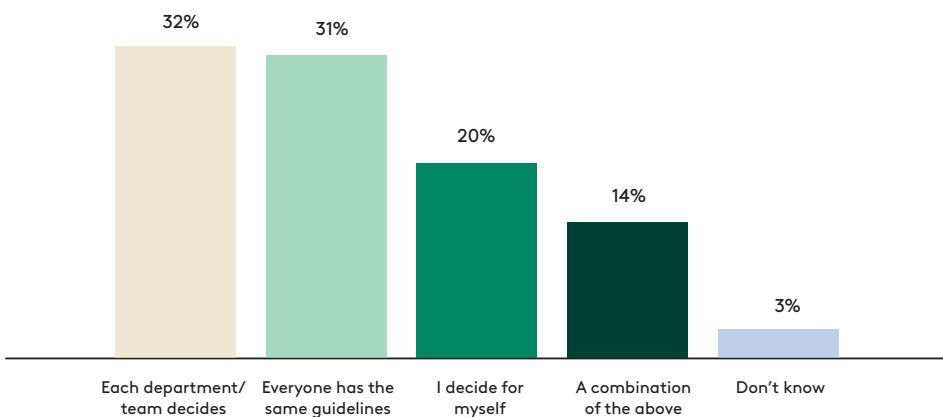
More men than women get to decide about their flexibility

Most organisations have guidelines on remote working. However, only one in three companies have the same guidelines for all employees, and one in three companies allow each team or department to decide the scope and rules applicable to remote working. One in five respondents say they have no guidelines at all, and that the decision is entirely up to them.

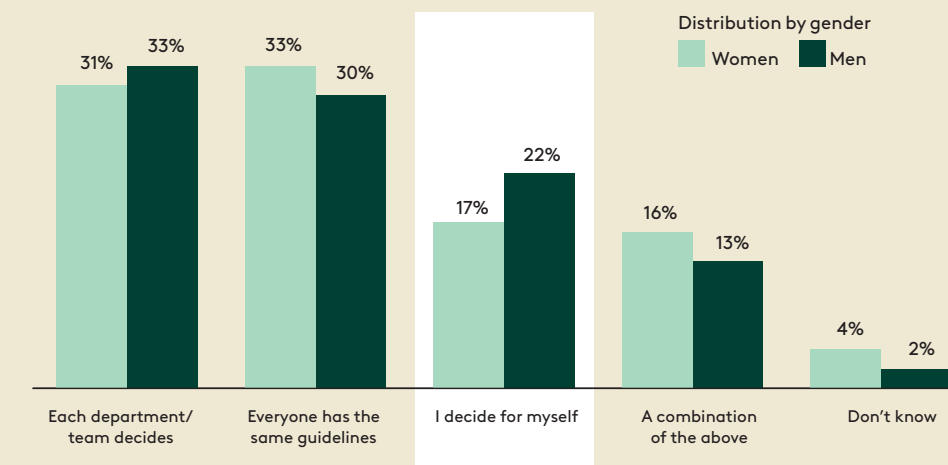
There is a clear gender gap in terms of whether respondents can decide whether they work remotely. 22 percent of men decide for themselves, as opposed to 17 percent of women. The actual difference is 30 percent in men's favour. Is remote work a gender equality issue?



What are the guidelines on remote working at your workplace?



What are the guidelines on remote working at your workplace?



Four out of five would accept mandatory office attendance

Our survey included the question: How would you react if your employer introduced mandatory office attendance every working day of the week?

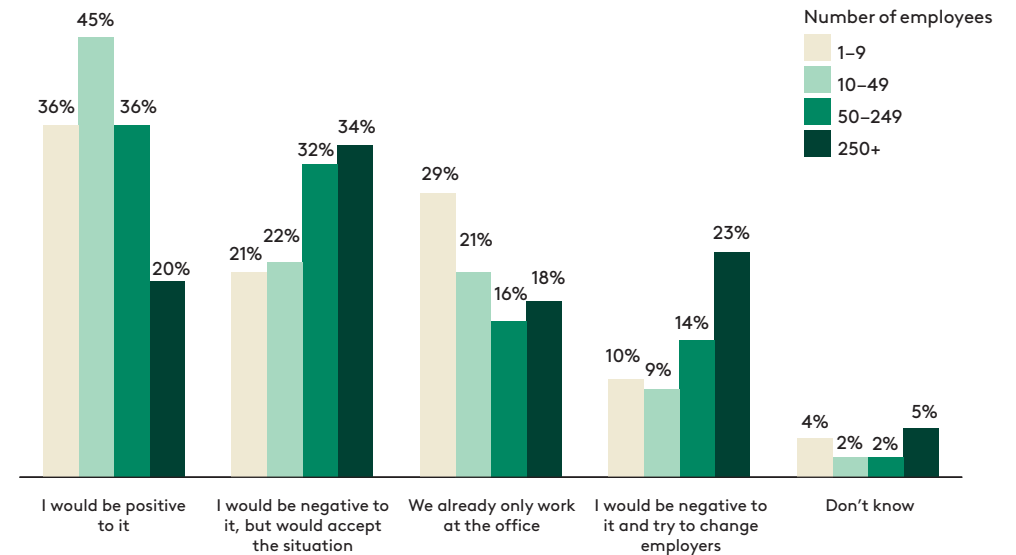
A total of 80 percent said they would accept mandatory office attendance (20 percent of respondents already have mandatory attendance). However, 16 percent said they would prefer to resign and seek employment elsewhere. More than 50 percent of respondents who currently mainly work remotely would attempt to change employers, compared to only 6 percent of those who mainly work at the office.

Those positive to mandatory attendance were predominantly middle managers and

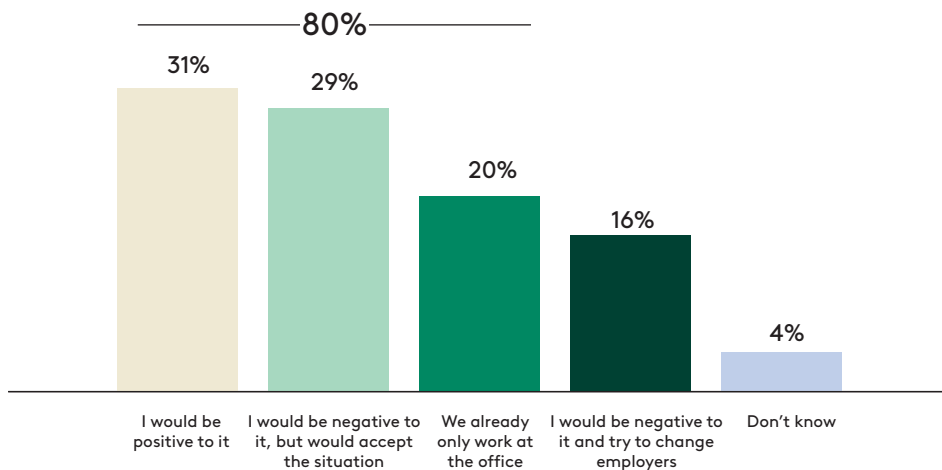
senior managers at companies with 10–249 employees. However, employees at smaller as well as larger companies were more negative to the idea of mandatory office attendance. Age-wise, the youngest office workers (<25 years) stood out as being the most positive towards mandatory presence.

This issue also showed a large difference between men and women. 37 percent of men were in favour, as opposed to 25 percent of women. Male respondents were 48 percent more favourable to mandatory office attendance than their female colleagues.

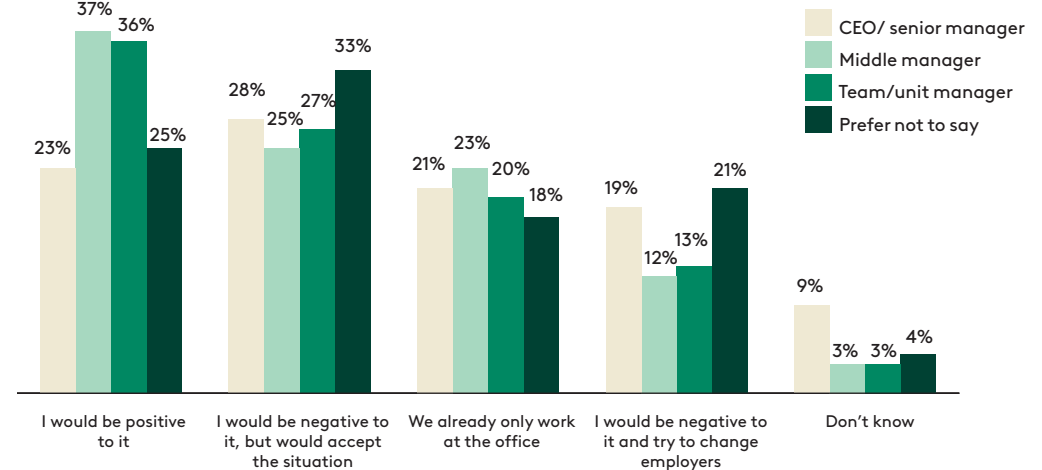
How would you react if your employer introduced mandatory office attendance every working day of the week?



How would you react if your employer introduced mandatory office attendance every working day of the week?



How would you react if your employer introduced mandatory office attendance every working day of the week?



About Castellum

Castellum is one of the largest listed property companies in the Nordic region. We create sustainable workplaces for the future and strive to provide spaces that help organisations and people to thrive and develop. Everyone deserves a workplace they feel proud of.

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