

THE WORKPLACE (R)EVOLUTION

Reimagining Presence

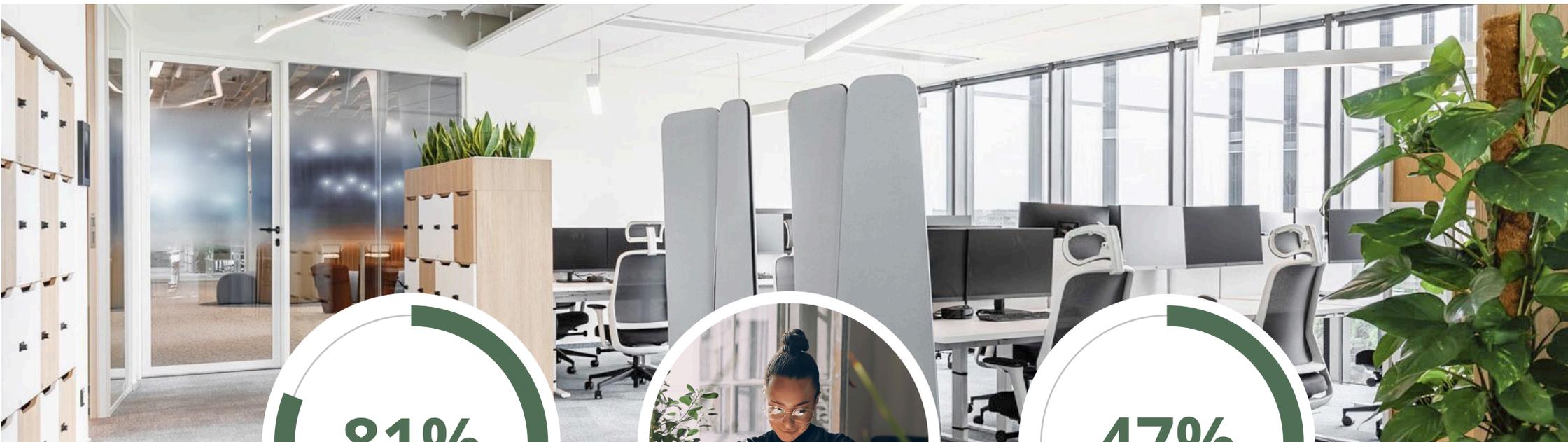
Find your space to thrive



THE WORKPLACE (R)EVOLUTION WORKPLACE (R)EVOLUTION WORKPLACE (R)EVOLUTION WORKPLACE (R)EVOLUTION WORKPLACE (R)EVOLUTION

CHAPTER 1

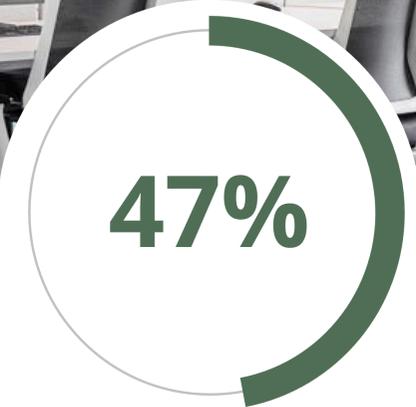
The evolving workplace landscape



of employees work in a hybrid arrangement—most commonly **working from home 1-2 days per week**



employees working from home **1-2 days weekly report the highest satisfaction** with home-working allowances



expect **no change** in their home-working patterns over the next five years



81%

of employees
work in a
hybrid
arrangement

WHY PEOPLE VALUE WORKING FROM HOME

**Efficiency and personal
time matter**

Top perceived benefits of remote work:

Avoiding the commute

Generation Z has lower resistance to commuting, whilst Generation X and Baby Boomers are 33% more likely to value avoiding the commute.

Better work-life balance

Greater ability to work efficiently and focus

THE LIMITS OF “TOO MUCH” REMOTE
WORK

Flexibility has a tipping point



of survey responses express concerns about long-term, high-levels of home working



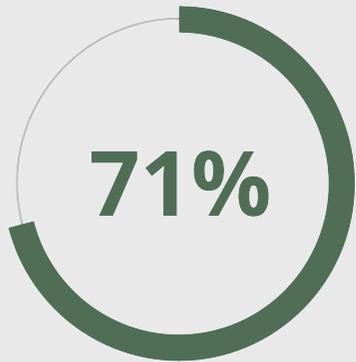
Key concerns include:

Reduced professional and social networks

Weaker relationships with colleagues

Limited career development opportunities

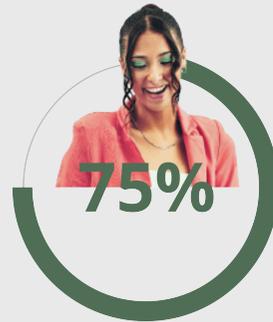
THE OFFICE STILL MATTERS
Especially for connection,
learning and growth



of employees see
the office as important



among
Millennials

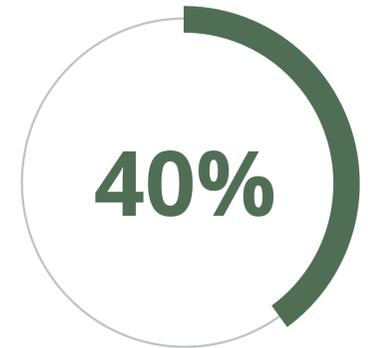


among
Generation Z

Biggest perceived benefits of the office:



spending time with
colleagues



knowledge sharing and
learning

EXPERIENCE DRIVES ATTENDANCE

People come for the experience—not the desks



in **1 in 4** survey responses, employees are dissatisfied with their current office environment or facilities



of responses say a better workplace experience would motivate them to be in the office more often

Ideal workspace priorities:



want productivity-enhancing features



prioritise wellbeing-focused features

The defining challenge for workplace leaders is navigating increasingly varied expectations of work and the workplace experience.



Hybrid working is the dominant model of work. Most employees now split their time between home and office, and many expect this pattern to remain largely unchanged in the years ahead. Flexibility has delivered clear benefits: less time commuting, greater autonomy and improved balance between work and life.

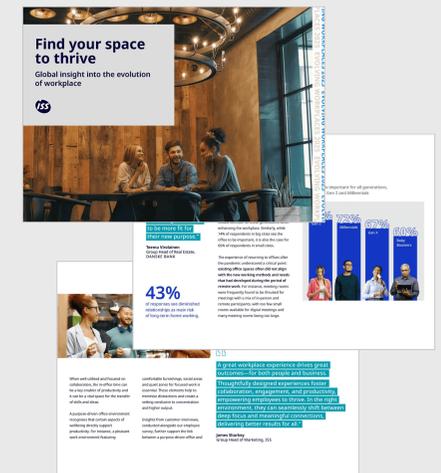
Insight from our [Evolving Workplaces: Find your space to thrive](#) report shows that **while employees broadly agree on the value of flexibility, they increasingly disagree on the purpose of the workplace. The same office is expected to support deep focus, high-energy collaboration, social connection, learning, wellbeing and personal values—often on the same**

For some, the office is a productivity anchor. For others, it is a social engine, a cultural signal or a retreat from distraction at home.

Employees say they value the office, particularly for collaboration and community. At the same time, many express dissatisfaction with office environments and question whether the commute is worthwhile. **The result is not rejection—people go to the office when the experience feels valuable.**

Many organisations have turned to mandates to restore predictability, and while these approaches can increase attendance in the short-term, they do not resolve the underlying issue. **Mandates address presence, not experience and outcomes.**

EVOLVING WORKPLACES Find your space to thrive



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Why one-size-fits-all workplaces no longer work

For decades, workplace strategy has been built around optimisation: standard layouts, consistent services and efficiency at scale. This logic worked when work itself was relatively uniform. Today, it creates friction.

When workplaces are designed around an “average” user, no-one truly feels supported. Open plans energise some and exhaust others. Quiet zones enable focus for some, while isolating others. Flexible seating creates choice for some—and anxiety for others.

The result is an accumulation of small frictions across the day—from arrival to lunch to meetings—that quietly erode engagement over time.

A desk may be occupied—yet the experience can still be failing.

Crucially, these frictions are not always visible in utilisation data or attendance metrics. **This is why space alone cannot solve the modern workplace challenge.**

ISS reframes the workplace not as a static environment, but as a sequence of moments and touchpoints.



Presence is experienced through the workday: planning ahead, commuting, entering the building, working, taking breaks, eating, collaborating and leaving. Each moment either reinforces or undermines the value of being there.

When these moments are designed in isolation, experience feels fragmented. When they are curated intentionally, experience becomes coherent. Read more about [touchpoints](#) in chapter "From space to system: A new mandate for workplace leaders".

CHAPTER 2

Designing for the differences

If the workplace is experienced through moments, then designing presence requires a deeper understanding of who those moments are for.

Traditional segmentation by role, hierarchy or generation only offers partial insight. Two employees of the same age and function may experience the workplace entirely differently. What differentiates them is not who they are on paper, but why they choose to be there.

Our insight is clear: employees no longer come into the workplace for the same reasons. Designing for an “average” employee, or a single dominant use case, creates friction for everyone.

In this evolution of the workplace, our insight highlights four personas that stand out.



Employees no longer come into the workplace for the same reasons. Designing for an “average” employee, or a single dominant use case, creates friction for everyone.

These personas represent different motivations for presence—not job roles or personality types.



Anchored routine-seeker

Purposeful visitor

Focused escape-seeker

Values-driven aligner

Primary motivation	Stability and productivity	High-value connection	Deep focus	Purpose and alignment
How they use the workplace	Regular, predictable days	Selective, intentional visits	Concentrated work sessions	Symbol of values and culture
What “good” looks like	Frictionless routines	Energy, interaction and learning	Calm, quiet and control	Inclusive, ethical experience
What breaks the experience	Uncertainty and noise	Empty spaces and poor coordination	Distractions and crowding	Performative values
Emotional driver	Security and confidence	Momentum and belonging	Calm and clarity	Trust and pride
Design implication	Design for reliability	Design for connection	Design for protection	Design for credibility



The anchored routine-seeker

Anchored routine-seekers rely on structure and predictability to do their best work.

They attend the office regularly on set days and value the workplace as a stable anchor for productivity and familiar social interaction.

Reliability matters more than variety.

Demographic prevalence

Common among Millennials, Generation X and Baby Boomers, particularly employees with caring responsibilities or established roles.

Expectations and needs

- Predictable routines and clear ways of working.
- Reliable access to desks or preferred work zones.

- Intuitive technology and seamless support.
- Comfortable, familiar environments.

Pain points

- Uncertainty around seating or availability.
- Disruptive noise and constant change.
- Friction caused by unclear processes.

Emotional drivers

- Security through familiarity.
- Confidence that the day will run smoothly.
- Satisfaction from sustained productivity.

Strategic implications for workplace leaders

Routine-seekers highlight the importance of consistency as an experience principle.

Flexibility must be balanced with reliability to maintain trust and engagement.



The purposeful visitor

Purposeful visitors come into the office selectively, driven by collaboration, learning and culture.

Presence is a choice—and the experience must justify the effort.

Presence must deliver a clear return on effort.

Demographic prevalence

Often found among Millennials, Generation X and mid-career professionals in collaborative or leadership roles.

Expectations and needs

- Visibility into who will be present.
- Well-supported collaboration and meeting spaces.

- Social, vibrant environments.
- Opportunities to learn and connect.

Pain points

- Empty offices or poor coordination.
- Weak meeting experiences or technology.
- Flat, transactional environments.

Emotional drivers

- Energy from meaningful interactions.
- Momentum and shared purpose.
- Feeling that time spent commuting was worthwhile.

Strategic implications for workplace leaders

Purposeful visitors reinforce the need to curate moments of connection—making collaboration, events and hospitality central to workplace value.



The focused escape-seeker

Focused escape-seekers use the workplace as an environment for deep concentration.

They come in to think, progress work and escape home-based distractions.

Focus is fragile and easily disrupted.

Demographic prevalence

Prevalent among Generation Z, Millennials and parents and employees without dedicated home workspaces.

Expectations and needs

- Quiet, clearly defined focus areas.
- Minimal interruption and predictable seating.

-
- Acoustic control and privacy.
 - Efficient access to food and services.

Pain points

- Loud open-plan environments.
- Overcrowding and visual distractions.
- Long queues during peak times.

Emotional drivers

- Calm and mental clarity.
- Sense of control over the environment.
- Satisfaction from uninterrupted work.

Strategic implications for workplace leaders

Focused escape-seekers highlight the need to protect focus without eliminating energy—through zoning, timing and thoughtful experience design.



The values-driven aligner

Values-driven aligners evaluate the workplace through the lens of purpose.

Inclusion, sustainability and authenticity shape whether they trust and engage with the organisation.

Demographic prevalence

Strongly represented among Generation Z and Millennials, with growing relevance across all age groups.

Expectations and needs

- Inclusive, accessible workplace design.
- Credible sustainability practices.

- Ethical, transparent food and services.
- Flexibility that respects individual needs.

Pain points

- Performative DEI or greenwashing.
- Uniform experiences that ignore differences.
- Lack of accessibility or neuroinclusive design.

Emotional drivers

- Pride in the organisation.
- Trust and alignment.
- Feeling that work contributes to something meaningful.

Strategic implications for workplace leaders

Values-driven aligners signal a shift toward experience as expression of purpose—requiring values to be embedded into everyday workplace moments.

Values must be visible and lived.

CHAPTER 3

From space to system: A new mandate for workplace leaders



While personas differ in motivation, they experience the same workplace journey. Planning ahead, arriving, working, eating and leaving are shared moments—but they are

experienced very differently by each persona.

This is why ISS focuses on curated workplace experiences.

Friction rarely comes from one major failure—it builds through small, disconnected moments.

We define workplace experience through touchpoints—every interaction between employees and the workplace ecosystem, spanning physical and digital environments, supported by people, services and technology.

A curated workplace intentionally connects these moments so that experience feels seamless, human and supportive of different needs.

For example:

- Planning and booking touchpoints reduce

uncertainty for routine-seekers and escape-seekers.

- Arrival, welcome and hospitality set the tone for purposeful visitors.
- Zoning, acoustics and responsive services protect focus for escape-seekers.

- Inclusive design and sustainable operations reinforce trust for values-driven aligners.

Key service interactions



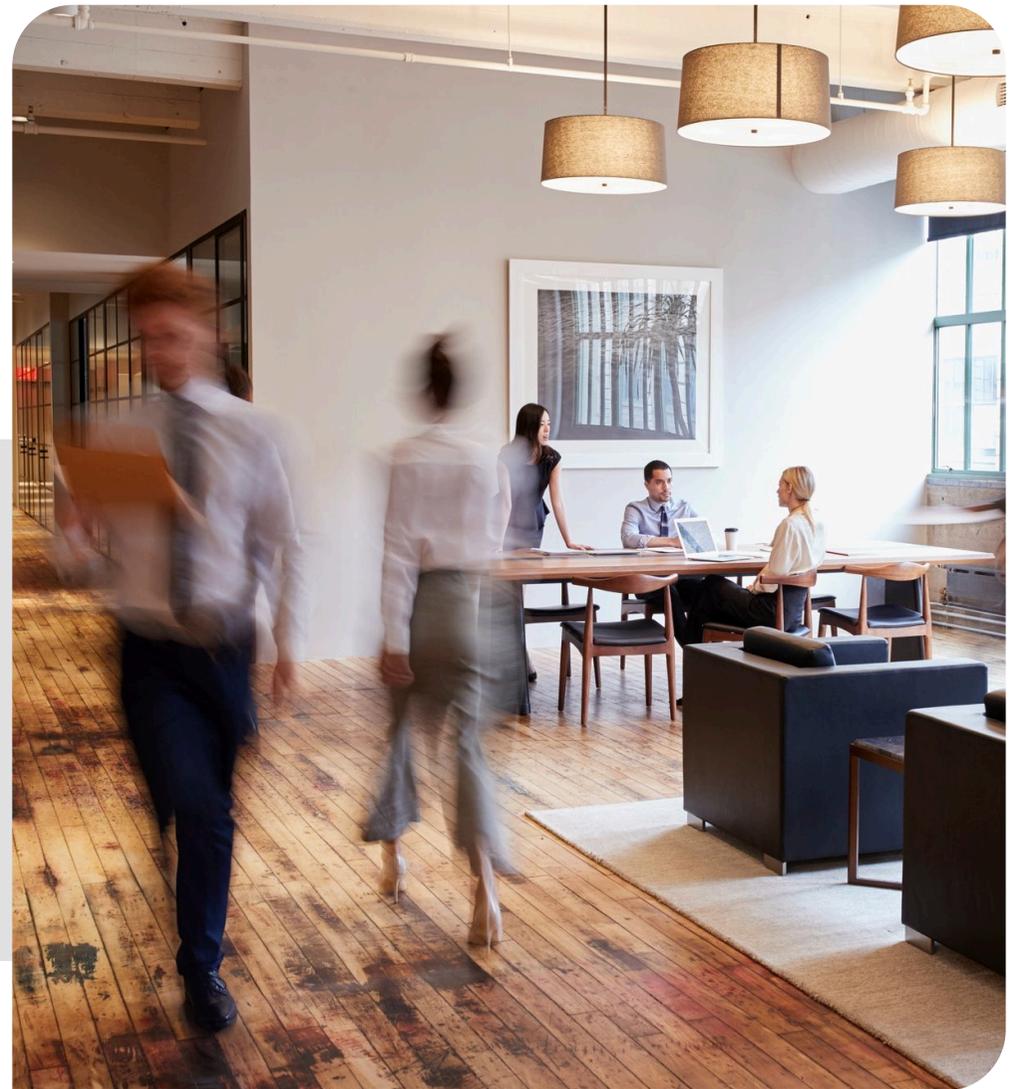
By curating touchpoints across the workday, organisations move from managing services in silos to orchestrating experience as a system.

Read more about [integrating people, platforms and processes to transform the employee experience](#).

DESIGNING CURATED WORKPLACE EXPERIENCES

Integrating people, platforms and processes to transform the employee experience

DOWNLOAD REPORT



What the top workplace leaders are doing differently

Organisations that are succeeding in hybrid environments are re-thinking what the workplace is *for*.

ISS sees the top workplace leaders doing four things consistently:

01 They design for contrast, not consensus

Rather than forcing uniform behaviour, they accept that different employees need different things from the workplace—sometimes on the same day.

They intentionally balance energy with focus, structure with flexibility and social connection with quiet space.

02 They curate moments, not just spaces

From arrival experiences and food offers to meeting support and end-of-day feedback, they focus on how moments feel—not just how they function.

Small improvements across the journey often deliver greater impact than major redesign.

Across these approaches, the workplace becomes a strategic asset rather than a cost centre—supporting culture, performance and retention in tangible ways.

03 They treat employees as guests

Workplaces that feel welcoming and intuitive drive stronger engagement.

Hospitality principles shape service delivery, while brilliant basics—clean, safe, reliable environments—are delivered consistently as the baseline, not a differentiator.

04 They make values visible

Sustainability, inclusion and wellbeing are no longer abstract commitments.

Leading organisations embed them into daily experience through accessible design, ethical food choices, responsible operations and clear storytelling across the workplace.

A new mandate: From managing workplaces to orchestrating experiences

Hybrid working has expanded the remit of workplace leaders as they are no longer only responsible for space, efficiency or compliance. They are now central to how organisations create culture, enable performance and express values—every day, through experience.

This requires a new mindset.

Workplace leaders must move from managing inputs—desks,

days and policies—to shaping outcomes: engagement, productivity, belonging and trust.

Doing so means breaking down silos and integrating real estate, services, technology, HR and sustainability into a coherent system that works for different people, in different ways.



Designing the workplace as a system

Thriving at work is not owned by one function. It is shaped across the employee day—through many small, connected decisions.

When the workplace is treated as a system, value is created through alignment:



Insight-led workplace design

Using data to understand behaviour and translate it into clear proposals that support different work modes.



Technology that reduces friction

Helping employees navigate their day with confidence—from planning and arrival to collaboration.



Intentional team leadership

Designing time together around learning, collaboration and connection, not just co-location.



People practices focused on outcomes

Enabling productivity, engagement and trust—rather than optimising for process or presence.

Crucially, this is not about designing for the average employee. It is about enabling choice, clarity and consistency across the shared workplace journey so that every persona can thrive, without fragmenting the experience.

The opportunity is clear:
When workplaces are treated as systems—not static spaces—they become more adaptive, more human and more aligned to business intent.

Download the full report on your device now.

[DOWNLOAD REPORT](#)



For workplace leaders, the new mandate is:

To move beyond operating buildings and services, and instead towards orchestrating experiences that people choose to be a part of.

Research methodology

Nearly 11,000 respondents from 15 countries participated in a quantitative survey aimed at providing insights into evolving workplace trends.

Research methodology

The development of this report and its analysis was led by ISS Global Insight team and enabled by the convergence of two key primary insight input sources.

Note: The results of the multiple-choice questions in the survey are presented in this report as percentages of total responses (instead of respondents). This is to ensure the percentage figures add up to 100%.

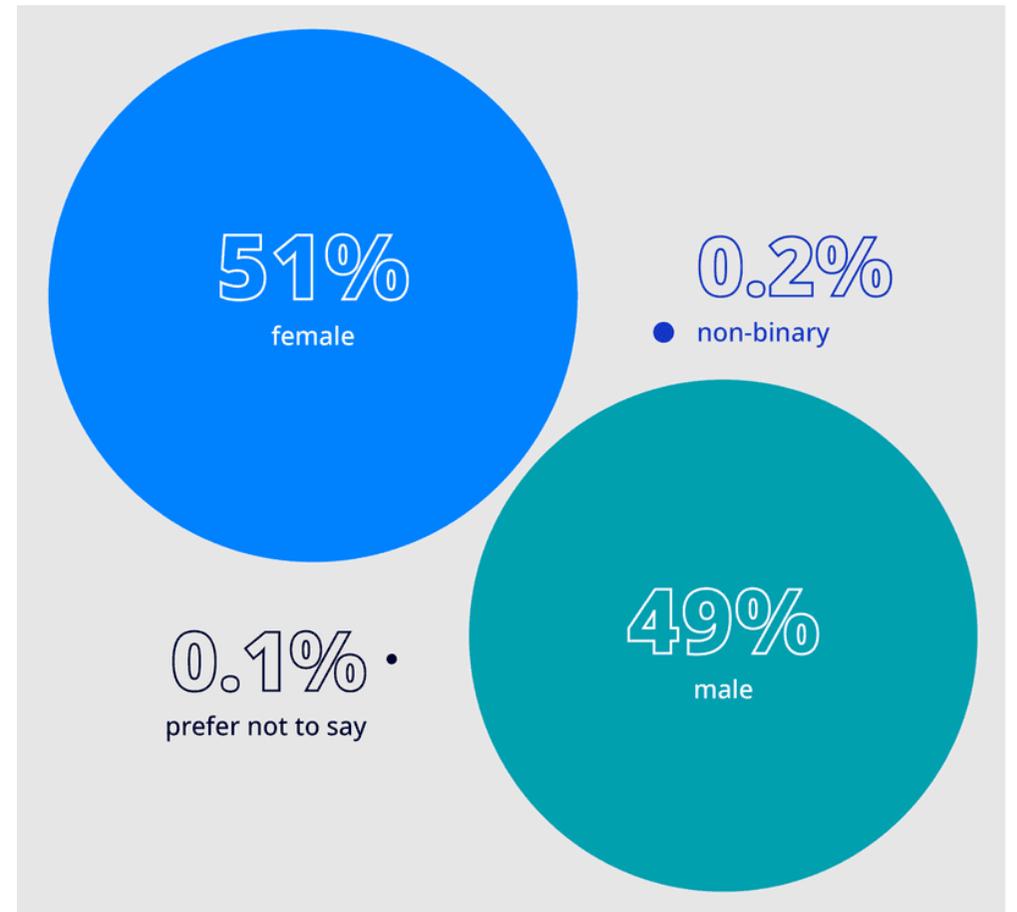
Surveys

- In collaboration with research firm Qualtrics, nearly 11,000 respondents from 15 countries participated in a quantitative survey aimed at providing insights into evolving workplace trends.
- 2,913 customer responses from 29 countries participated in ISS Customer Engagement survey aimed at understanding customers' (employers') long and short term priorities within their facility management strategies.



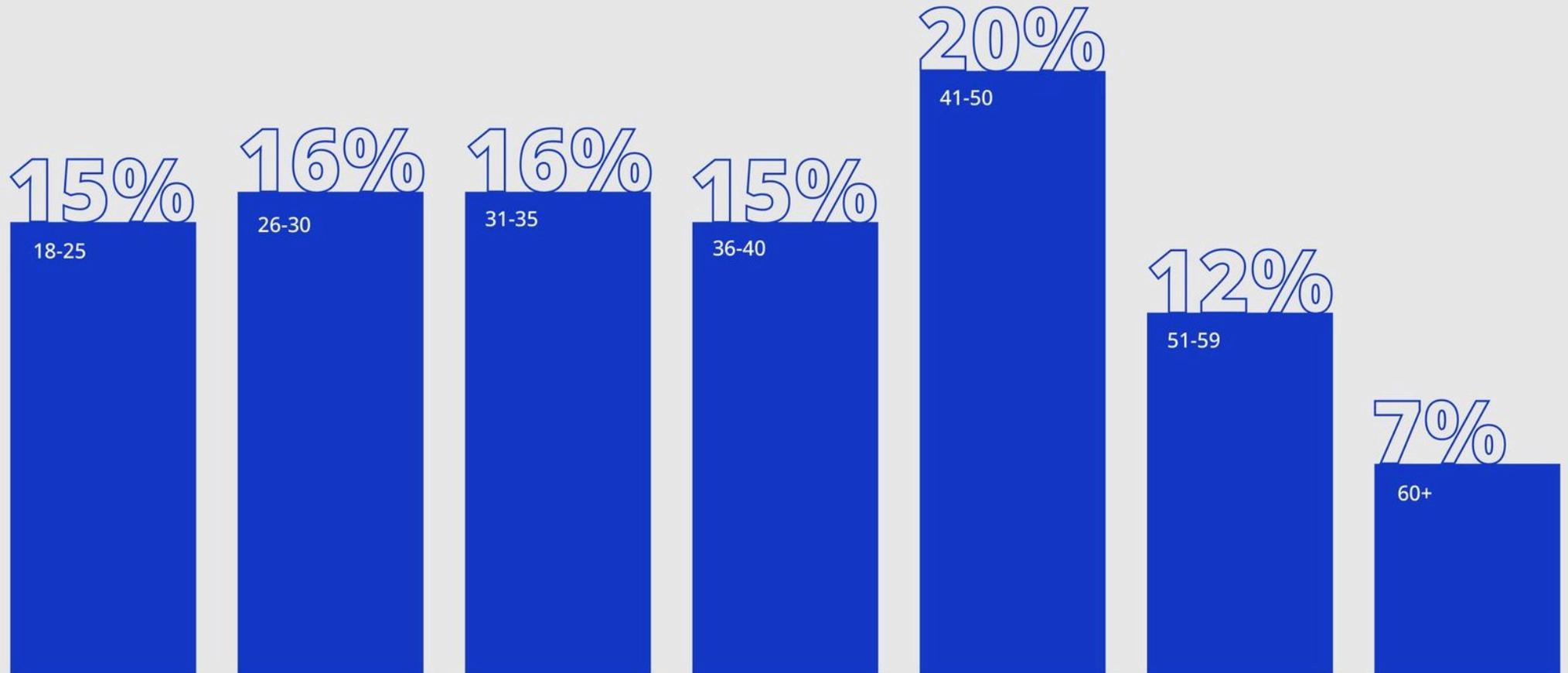


Gender

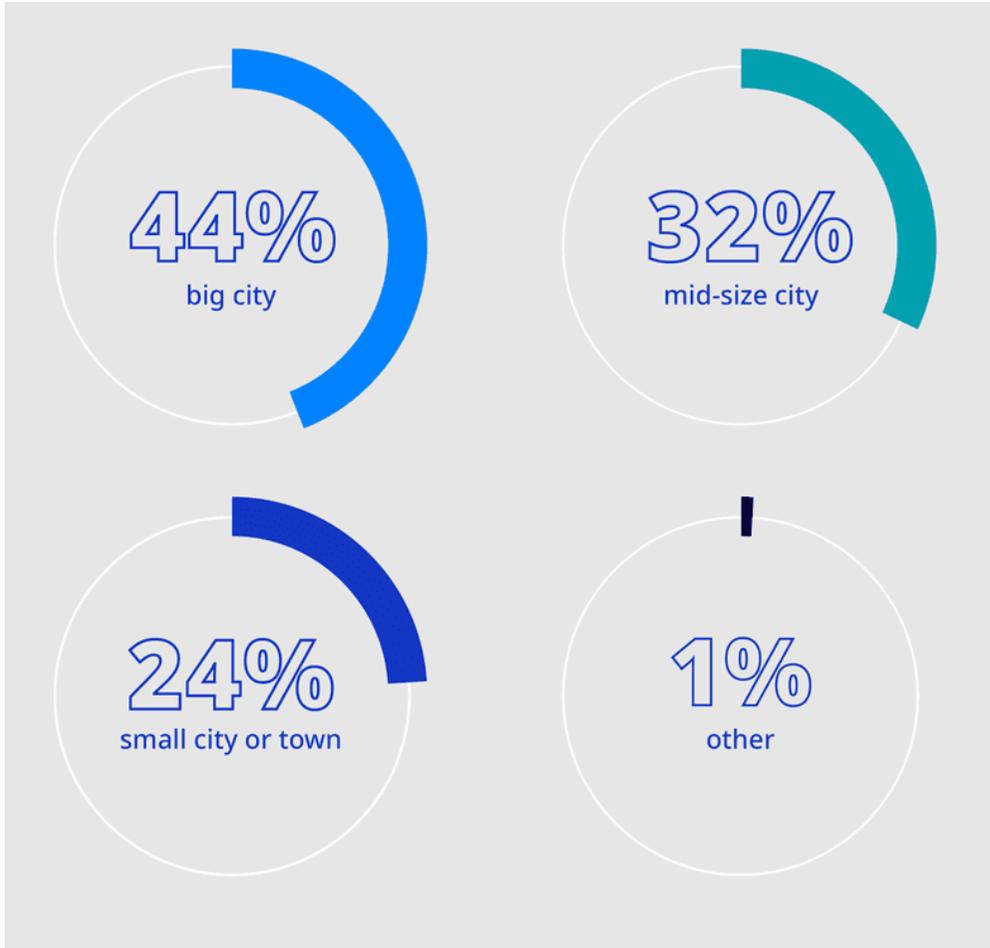


Age group split

THE NUMBER OF RESPONDENTS PER AGE GROUP IS AS FOLLOWS:

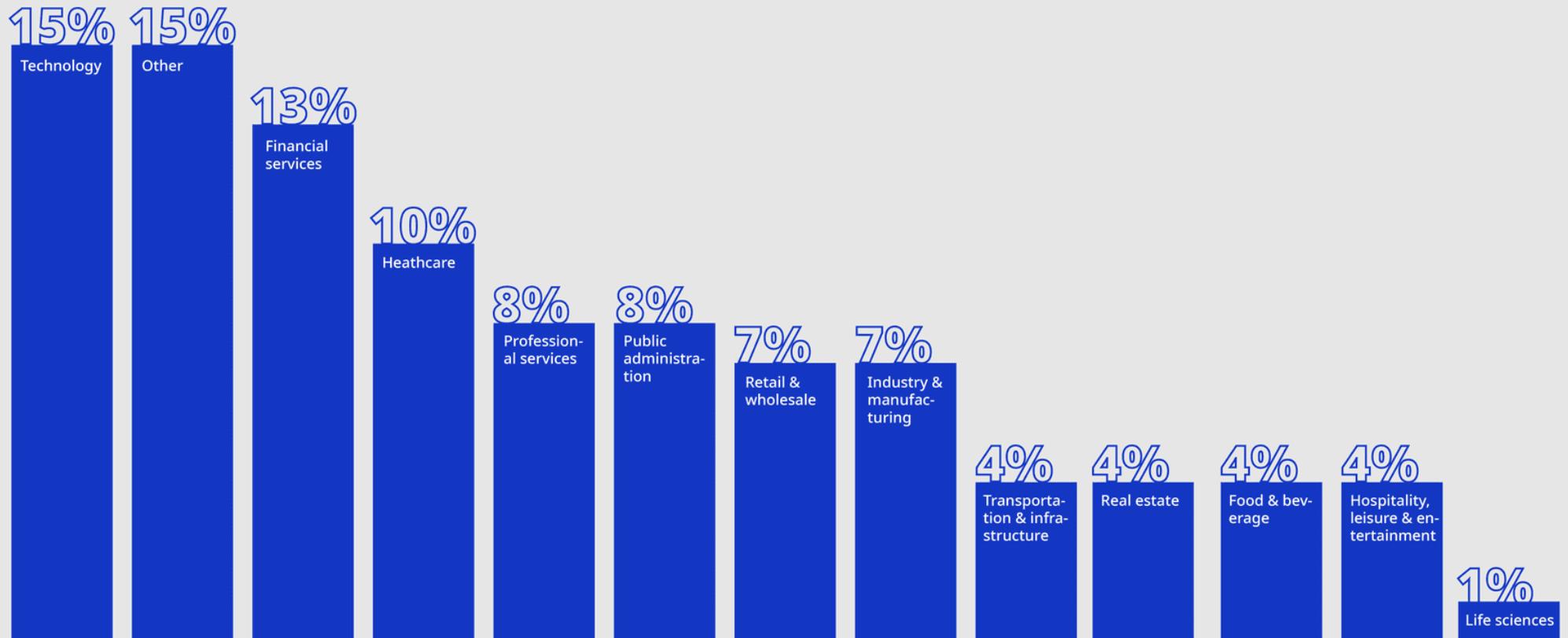


What kind of area do you live in?



Industry split

THE NUMBER OF RESPONDENTS PER INDUSTRY IS AS FOLLOWS:



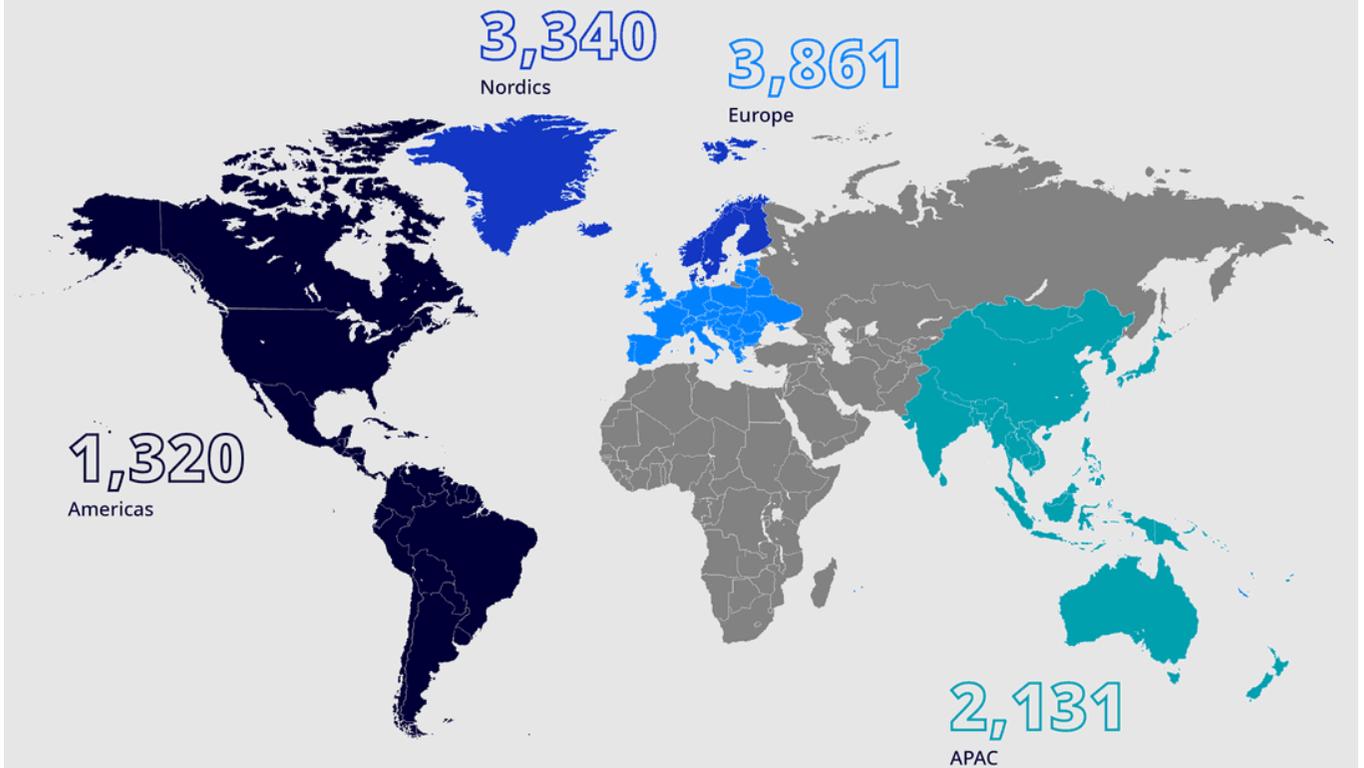
Countries

THE EMPLOYEES WERE BASED IN THE FOLLOWING 15 COUNTRIES:



Regions

THE NUMBER OF RESPONSES PER REGION:



CHAPTER 5

Services

We support over 40,000 customers who occupy financial services, technology, professional services, food and beverage, industry and manufacturing, life sciences or healthcare segments. ISS offers a single service cleaning or integrated facilities services for these businesses, with the latter including cleaning, food services, technical or workplace services.

Cleaning

Providing quality solutions that take cleanliness and hygiene to new standards. Delivering great workplace experiences in functional, clean environments.

Workplace

Developing and implementing solutions that improve people's wellbeing, engagement and productivity. Services that increase the value derived from investment and support sustainable, ethical work cultures.

Food

Curating great experiences through personalised food programmes that fit evolving business needs, support organisational priorities and promote engagement and connection.

Technical

Maximising the lifecycle of customer assets through data-driven facility management guided by best practices, proven processes and procedures and proactive, consistent service delivery.



About ISS

ISS, a leading workplace experience and facility management company, provides placemaking solutions that contribute to better business performance and makes life easier, more productive and enjoyable—delivered to high standards by people who care.

Originally formed in 1901 as a night-watchman company, we have developed into an integrated facilities services business with over 325,000 employees spanning over 30 countries. Our mission is: 'We make space for people and businesses to thrive'.



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Thank you for reading
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(R)evolution:
Reimagining Presence**

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