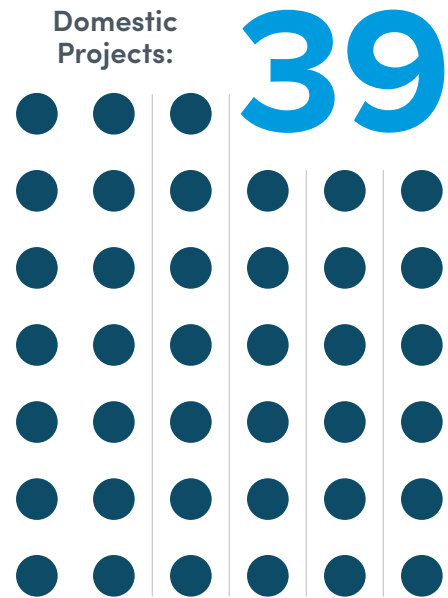




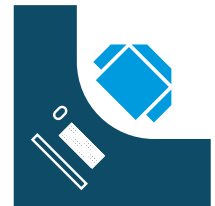
# TMA By the Numbers

## Benchmarking redefined for a digital age

As part of a firmwide initiative, we created a TMA benchmarking database to provide insights on the metrics, trends and strategies that are influencing workplace design today. Spanning multiple industries and encompassing over 2.5 million square feet of workspace built during 2014 and 2015, this robust tool provides the most comprehensive analysis of recent workplace design projects available in the marketplace.



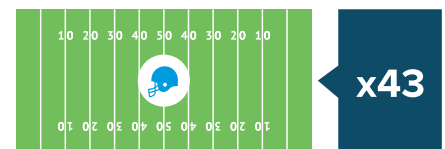
Total workspaces from all projects: **17,084**



This includes individual workspaces such as offices, open workstations, seats in workrooms, trading areas, etc. That's a lot of places to work!

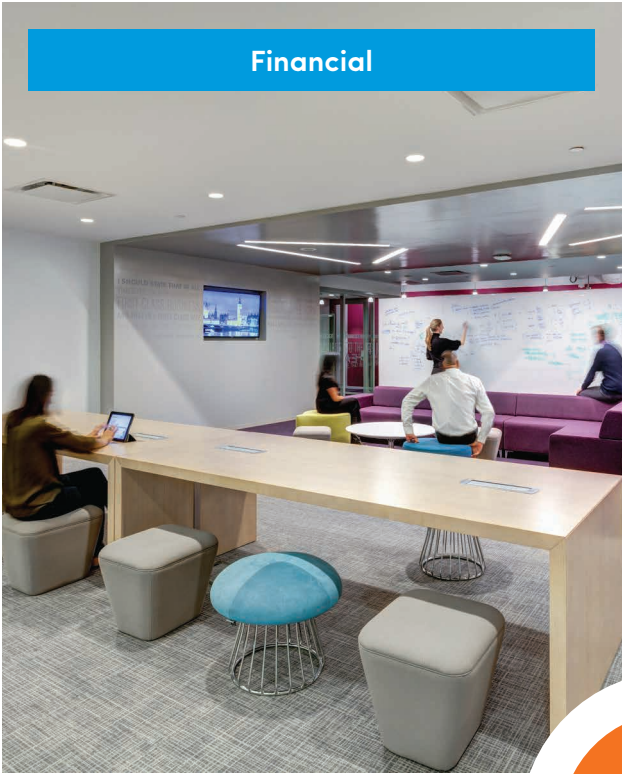
Total usable square feet (USF) for all projects:

**2.5 million** USF

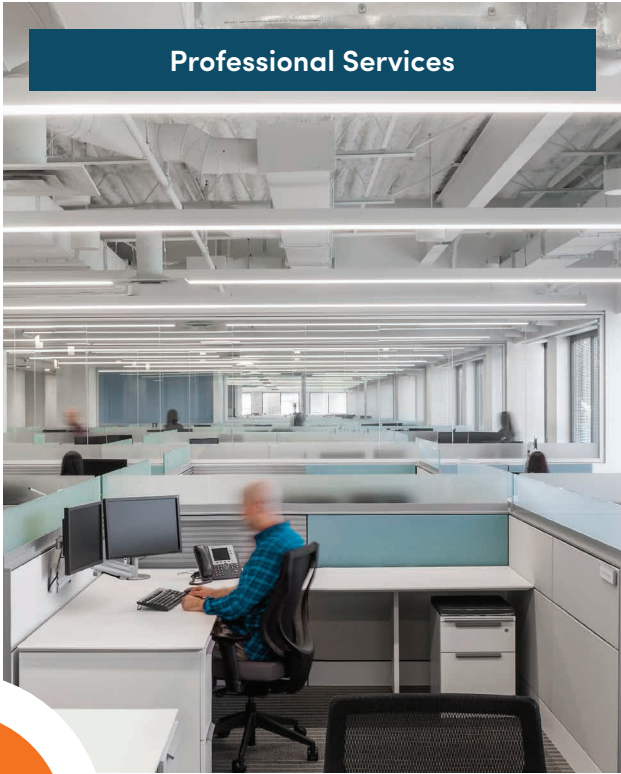


This number is used for benchmarking, as it can be compared consistently across global regions and various building types. It is measured as the area of the building from the finished face of the building to the centerline of demising walls, not including any vertical penetrations. In other words, it's the space you can use!

Financial



Professional Services



4

Industries

Consumer Products



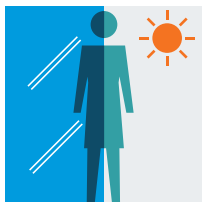
Digital Media



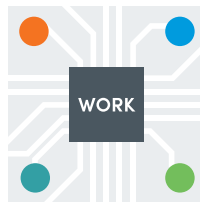
# Change Realized

## The things we've been talking about... they're happening

Perhaps the most interesting thing that we've seen happen over the past several years is the widespread adoption of progressive concepts that have existed for some time, but have not necessarily been accepted by many organizations – until now. As technology allows us to be more mobile, and as expectations about where and how work happens continue to change, we are finding that companies of all types are challenging traditional assumptions about the workplace.



**Visibility and transparency**  
Open perimeters, transparent glass walls, and low partitions have become the new norm across most industries.



**Ubiquitous technology and mobility**  
The wireless office has become a reality, and is enabling activity-based work environments to flourish.



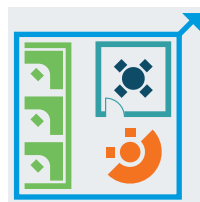
**Variety and choice**  
Informal collaboration spaces and alternative settings are finding their way into even the most traditional work cultures.



**Zones of activity**  
Shared quiet spaces and privacy zones are enabling confidentiality and concentration without the need for private offices.



**Amenities as destinations**  
A strong focus on amenities is driving activity in the workplace and encouraging movement between floors and buildings.



**Neighborhoods of workspace**  
Scalable groupings of team workspaces and ancillary spaces are creating spatial diversity in open office landscapes.

## Big Questions we Asked:



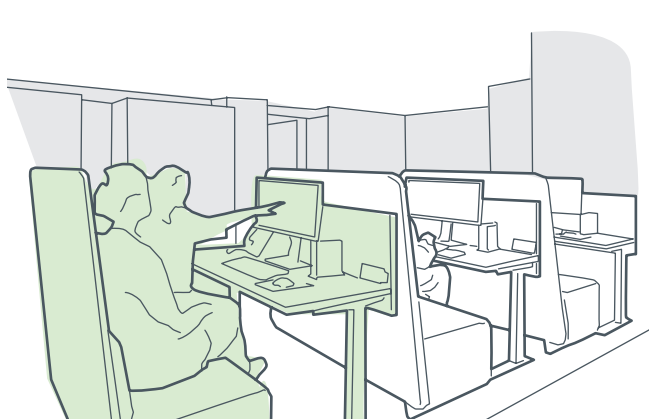
### WORKSPACE

Have we reached the limits of open plan and densification?



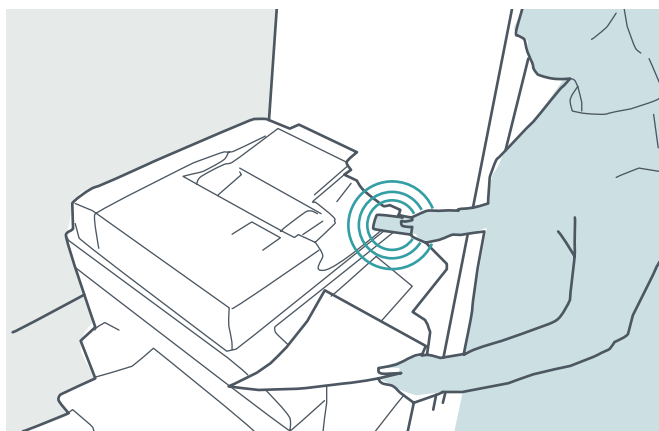
### ALTERNATIVE SETTINGS

How do we categorize space types in the office of the future?



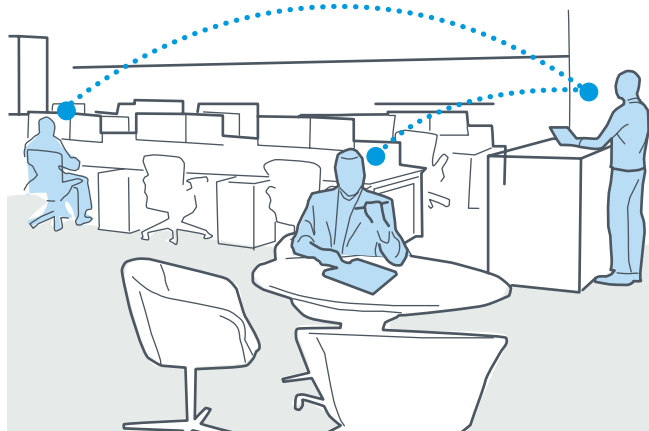
### SUPPORT & TECHNOLOGY

What impact is new technology having on equipment needs and storage requirements?



### MOBILITY

Can someone come to the office every day and still be a mobile worker within it?



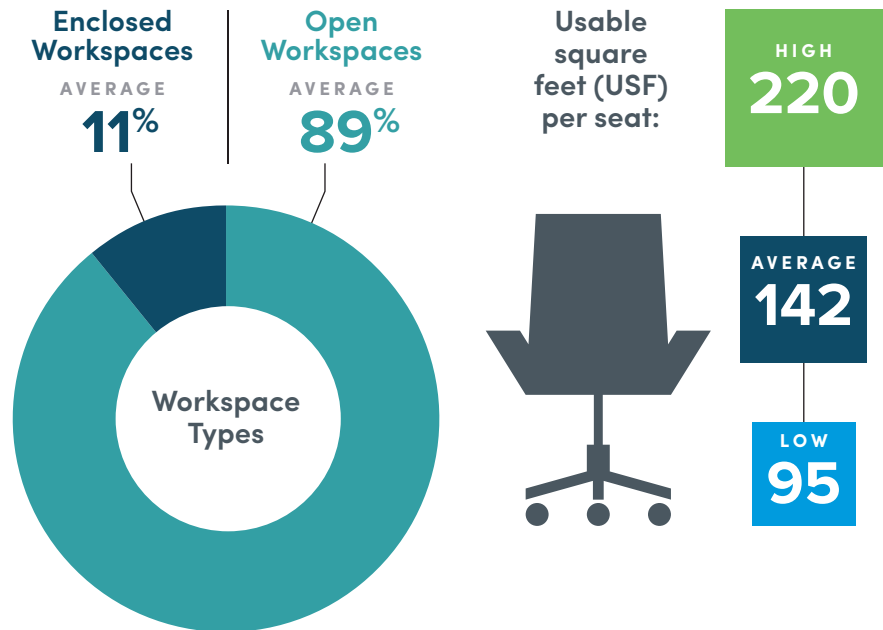
# Workspace

## Unprecedented density and application of open plan

As companies seek to achieve greater efficiency and sustainability in the workplace, the area per occupant and number of private offices allocated across industries have dropped to an all-time low. This is testing the limits of building systems, vertical transportation, egress, and parking allocations for many organizations as they adopt more efficient footprints. It also evokes the question – how do you use real estate efficiently, while at the same time providing a pleasant and productive work environment?

### Changing Metrics

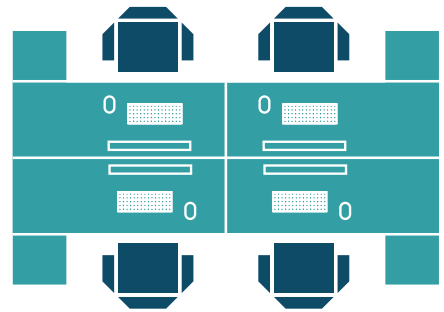
Just a few years ago, it was considered “progressive” for a workspace to contain about 20% private offices and be between 175 to 200 USF per seat. Today, the average is significantly lower and trending ahead of industry predictions. We expect these numbers to drop even further as more organizations adopt 100% open environments and implement leveraged seating models.





### A move towards desking

“Benching” may still be a controversial word at many companies, but it continues to gain prevalence as organizations reallocate individual space to shared amenities and alternative workspaces.



On average

**67%**

of open workspaces  
are desking/benching

### Paper is finally disappearing

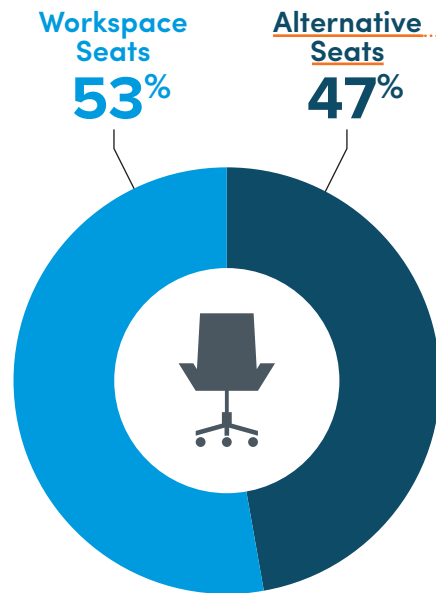
The dream of the “paperless” office still isn’t a reality at most organizations, but the “paper-light” office is. With an average of around one file drawer for every two people, companies are able to save significantly on real estate, improve their sustainability, and use space for more human-centered purposes.



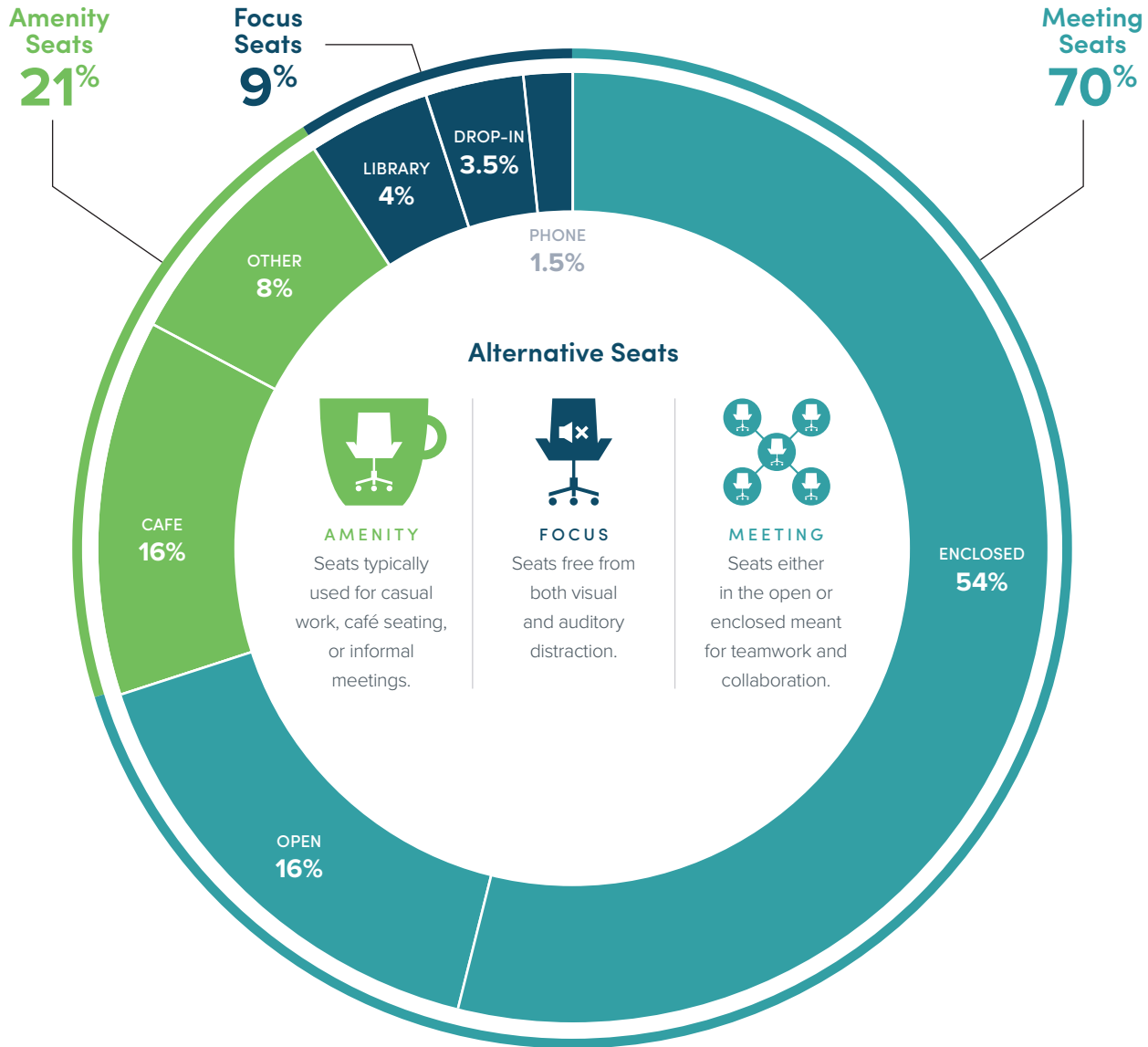
## Alternative Spaces

### They're not just about collaboration

With a greater emphasis being placed on shared space, the number of non-typical, or “alternative” seats (as we like to call them) has skyrocketed to nearly half of all the places available for employees to use. This is about three times more than was typical just five years ago. And it's not just about adding more collaborative space. Multi-functional amenities, focus rooms, and quiet work zones are supporting a greater diversity of activity with a lifestyle-oriented approach to work. To help clarify how we count and track all of these new types of spaces, we've developed three simple categories of “seats” as follows.







## Support Spaces

### Convenience is no longer king

Conventional wisdom in office planning is that “support” (things like supplies, printing, and coffee) should be convenient — mostly so people can do what they need to do quickly and get back to work. That’s changing. With growing emphasis on things like health and wellness, sustainability, and cultural engagement, we’re challenging traditional assumptions about convenience in order to encourage new behaviors. Like, if you had to walk a little further to a printer, could that be a good thing for your health? Would it make you think about what you print? Or, if there were only one place on the floor to get coffee, would you bump into people from other teams more often as a result? This is changing the ratios at which we provide support in the workplace.



WHAT'S  
IN THE  
RATIO?  
**1:?**



Ratios are a way of measuring the amount of “things” in a workplace by the relative number of people per each one of those “things.” For example, a ratio of stapler per people of 1:100 would mean 100 people are sharing 1 stapler per person. The humanity!

### Copy/print

Personal printer, what’s that? “Follow-me” printing means larger numbers of people can share copy/print equipment and that confidentiality is no longer a reason to have your own printer.



**1:72**  
PER PEOPLE

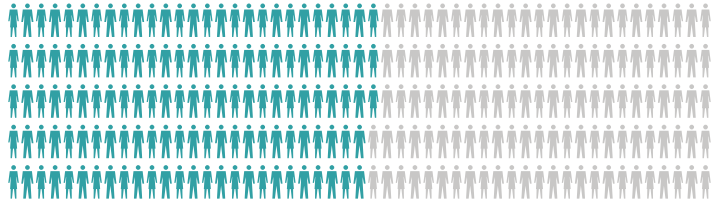


### Pantries

Say goodbye to coffee in the closet. Multiple small pantries are being replaced by larger, centralized cafés to drive interaction.



**1:133**  
PER PEOPLE



### Wellness

Wellness rooms and fitness areas are gaining traction, but are still surprisingly sparse in terms of actual allocations.



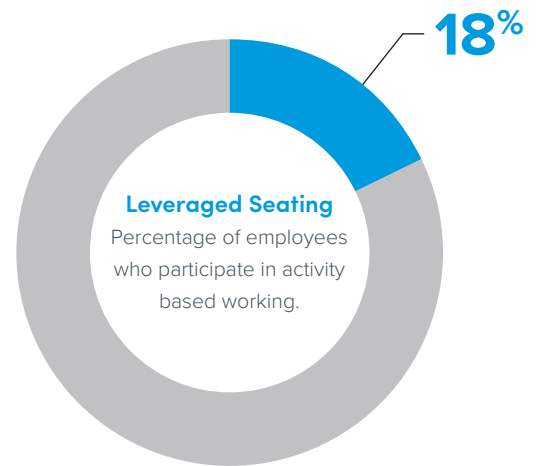
**1:251**  
PER PEOPLE



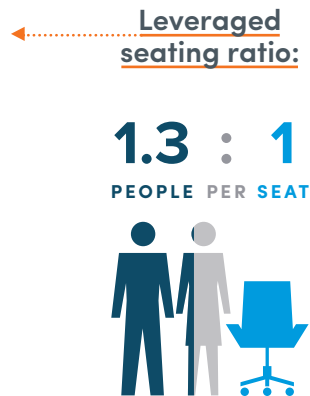
## Mobility

### The mobile worker is coming to work every day

Mobile workplace strategies are gaining prevalence in new sectors such as finance and media. These strategies aim to provide new amenities and a broader spectrum of workspace types, while simultaneously reducing total area per occupant. 100% unassigned “activity-based” models are replacing more traditional “hoteling” or reservation-based models, and enable even those people who come to work every day to be mobile within the office. To ensure success, organizations adopting these strategies are placing significant emphasis on change management and post occupancy analysis.

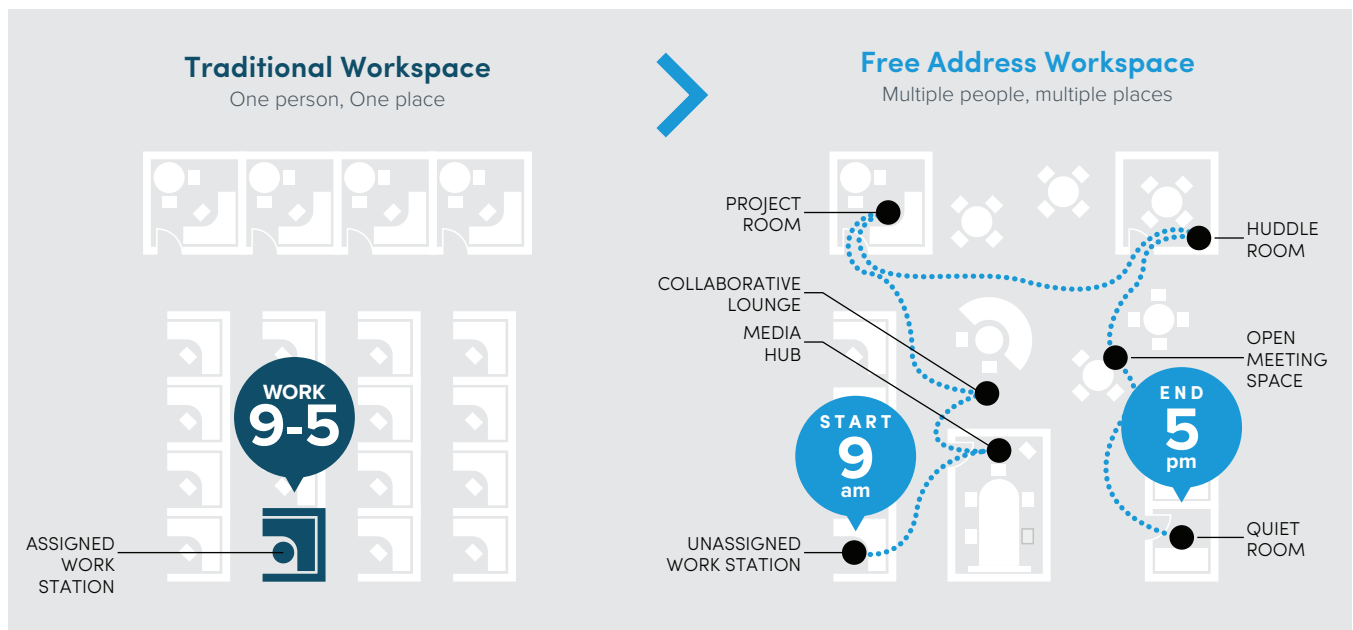
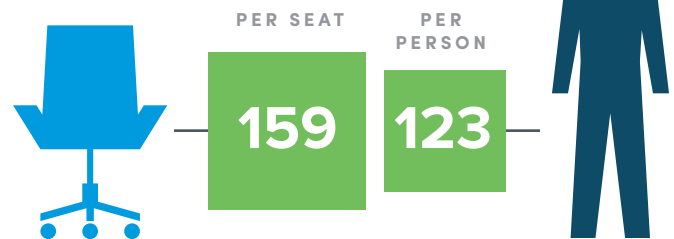


A leveraged seating ratio is the number of people per desk in an office. So, 130 people sharing 100 seats would be a ratio of 1.3:1. Did you know that, in pretty much any office, you could leverage seats at that ratio and still have enough seats for everyone who shows up to work on any given day? Cool right?



### Average usable square feet (USF):

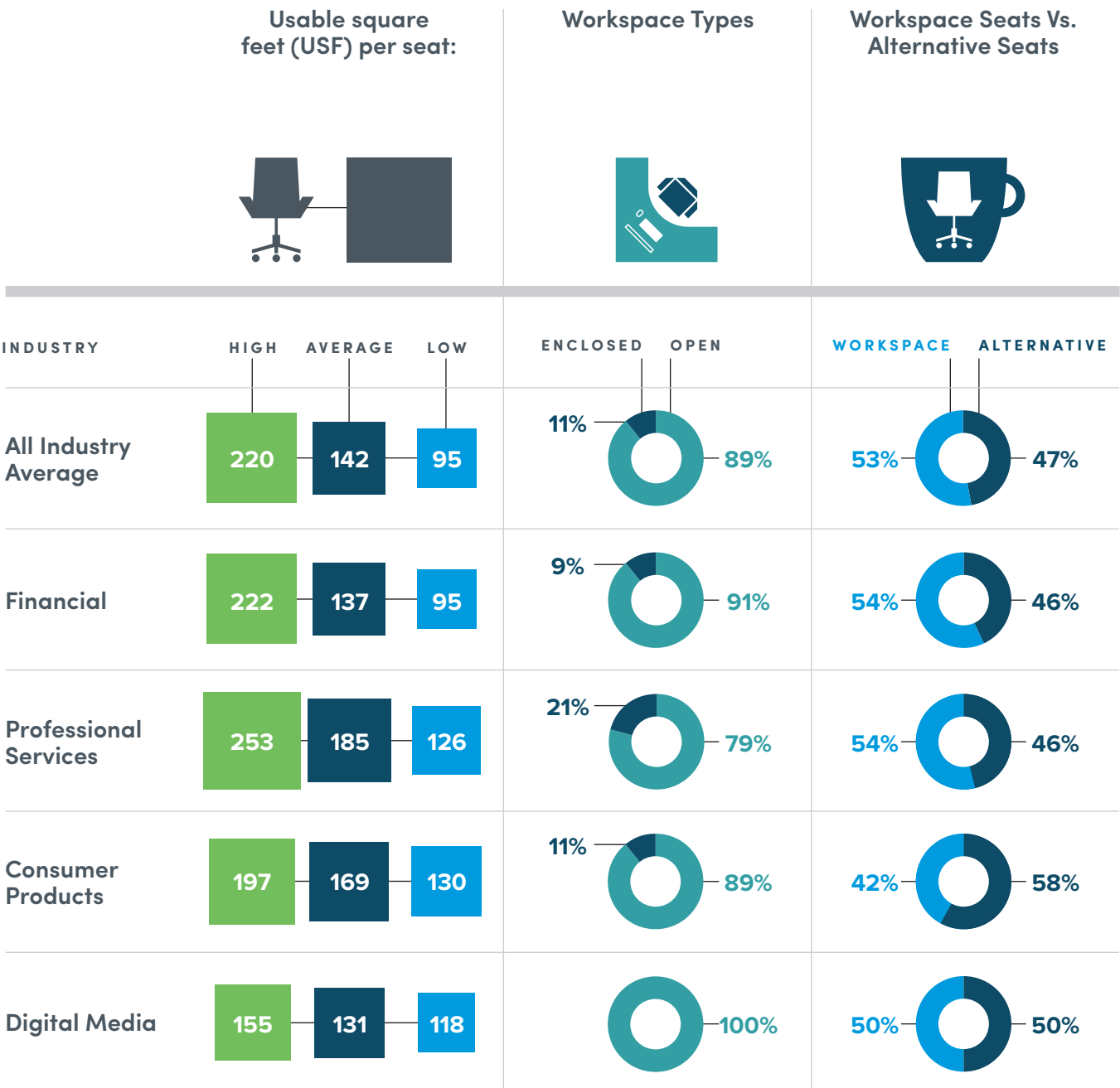
With this style of working, what matters at the end of the day is USF per person.



# The Power of Data

## Knowing where you are, so you can think about what's next

One of the unique attributes of the TMA Benchmarking database is our ability to segment data by project type, size, and location, amongst others. This allows us to provide insights based on various factors to show where differences exist, and to find commonalities that aren't always obvious.

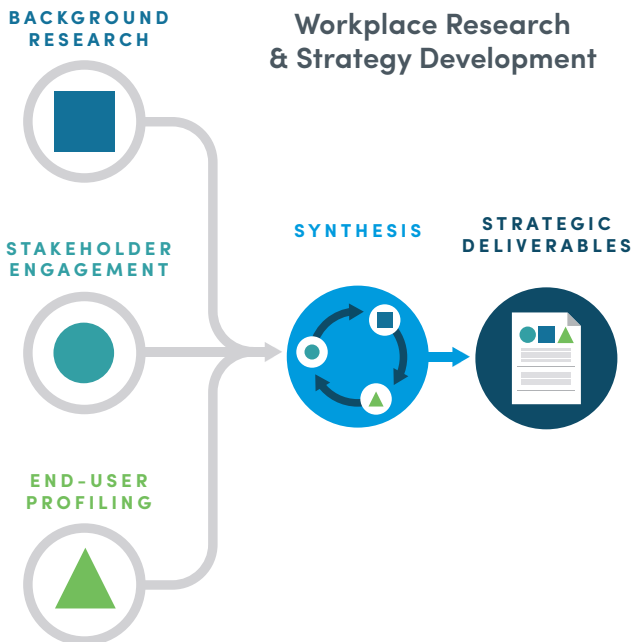


## Workplace Strategy Team

### Design with purpose

Beyond simply creating a new workspace, we see every project as an opportunity to implement new strategies that reflect your changing business environment and set the stage for how people will work in the future.

Drawing from a kit of quantitative and qualitative tools, our workplace strategy team customizes a discovery process based on the unique opportunities and challenges a project presents. Using the data we collect, we develop fact-based recommendations that drive performance and innovation in the workplace.



 **LEARN MORE!**  
This report only scratches the surface. We would love to tell you more about our results and our services. Contact our Workplace Strategy Team: [workplace@tedmoudis.com](mailto:workplace@tedmoudis.com)



**Jamie Feuerborn**  
WORKPLACE STRATEGY MANAGER

Jamie connects clients' business strategy with their physical environments, ensuring that they achieve the best return possible on their real estate investments.



**Judith Carlson**  
WORKPLACE STRATEGIST

Judith's primary role is to program workspace. In addition, she analyzes our full project portfolio to help support our business partners and clients with benchmarking information and trends.



**Macaulay Campbell**  
INFORMATION DESIGN STRATEGIST

Macaulay is a visual storyteller, distilling complex processes and data into creative and engaging information graphics. He designs in print, digital, and interactive mediums.

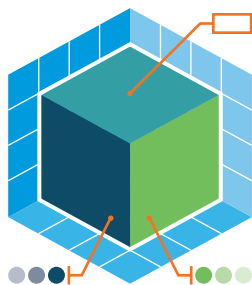
# About Ted Moudis Associates

Ted Moudis Associates designs corporate and retail interiors that provide sustainable environments and flexible workplace solutions built for longevity, productivity, and enjoyment. We believe that a built space should not only reflect but also enhance an organization's culture and values.

Businesses today face an unprecedented mix of social, economic, environmental, and technological challenges. Our diverse staff of multi-disciplinary experts in the fields of design, technology, sustainability and alternative workplaces help our clients to meet these challenges. We treat each client's needs as personal and unique, resulting in a hands-on approach that enables a future of communication, collaboration, and connectivity.

Founded in 1990 by Senior Principal Ted Moudis, AIA, and headquartered in New York with an office in Chicago and an alliance in London, we are a recognized Top 50 Design Giants firm by Interior Design Magazine.

## Our Expertise



### ARCHITECTURE & INTERIOR DESIGN

We are a full service architectural and interior design firm with services that span from research, benchmarking, and planning through design development, construction documentation, and post-occupancy studies. We work with you and your team to understand your business and to enrich and transform your environment.



### WORKPLACE PLANNING STRATEGIES

The design of your workplace is an opportunity to implement new strategies that reflect your changing business environment and set the stage for how your people will work in the future. We equip your employees with spaces and technology that enhance overall performance, while at the same time driving efficiency.



### BRANDING

For workplace and retail clients, brand integration into the built environment is a key factor in designing the perfect experience. Partnering with you, we deliver impactful graphics, technology solutions, and branded environments that are seamlessly incorporated into the architectural services we provide.



### FURNITURE COORDINATION

We analyze your furniture inventory and requirements in order to develop furniture purchasing strategies, budgets, and schedules based upon projected quantities and furniture styles. We monitor all scheduling of furniture production, delivery, and installation.

# TED MOUDIS ASSOCIATES

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