Daily Office Occupancy Levels Across Europe Are Increasing, but by 2025 Will Still be 30% Down on 2019

LONDON, March 11, 2020 — A new forecast from International Data Corporation (IDC) shows that in 2020 the number of home-based office workers increased by 17.7 times compared to 2019.

The forecast uses research on the intentions of companies to return employees to the office as well as national government statistics and macroeconomic forecasts. What emerges is a complex picture with an initial return due to the use of vaccines but not to the levels of occupancy seen pre-COVID-19. Occupancy then declines from the peak, but at faster rate than before the crisis. This trend is driven by a dramatic increase in flexible working, reinforced by the developments during lockdown, i.e., availability of homeworking equipment, and productivity benefits seen when working from home: both of which were not present before the pandemic. Another factor influencing reduced office occupancy is related to the cost savings associated with homeworking, opposed to renting an office floorspace.

With vaccination efforts well underway in Europe, IDC expects that the return to the office will start gradually in the second half of 2021 and throughout 2022, only to reach its height in 2023. The number of office-based professions is expected to continue to grow over the next five years, but this increase will not be sufficient to compensate for the decrease in office occupancy, which started with the COVID-19 pandemic. The events of 2020 triggered a global shift in working models and attitudes towards home working. As a result, IDC expects that by 2025, daily office occupancy across Europe will be 30.1% lower than in 2019.

"We are not going back to the way we worked before", said Mick Heys, Vice President, Future of Workplace, at IDC. "The role of the office will change to more of a collaborative and
creative space, with employees working from home at least one day per week. This has implications for the technologies used — it will be important the maintain digital equivalence for employees irrespective of location to maintain employee experience."

The IDC report, European 1Q21 Return-to-Work Forecast (IDC #EUR147478321), presents IDC's first forecast of the number of office workers returning to the office by number of days per week.

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