

From Culture Space to Productivity Powerhouse

The Comeback of the Office

Decision-maker survey in spring 2025 in collaboration with
Fittkau & Maaß Consulting

Report by

DESIGN OFFICES

vitra.



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01

Study Design

Study Design

Methodology of the Design Offices decision-maker survey

Study	DESIGN OFFICES Report 2025 From Culture Space to Productivity Powerhouse: The Comeback of the Office
Base Sample	Office space/office real estate decision-makers professionals (employees, entrepreneurs, self-employed) in private-sector companies with at least 50 employees. Participants must be involved in the selection and rental of office space in their companies – either as decision-makers or consultants. Age: 25 to 64 years Country: Germany
Methodology	Quantitative, written online panel survey Primary survey via the online research tool from Fittkau & Maaß Consulting Field service provider: Norstat Germany
Sample	200 office space/office real estate decision-makers surveyed
Survey Period	April 22 to 30, 2025
Commissioned by	DESIGN OFFICES GmbH
Research Institute	Fittkau & Maaß Consulting GmbH



Selection and renting of office space

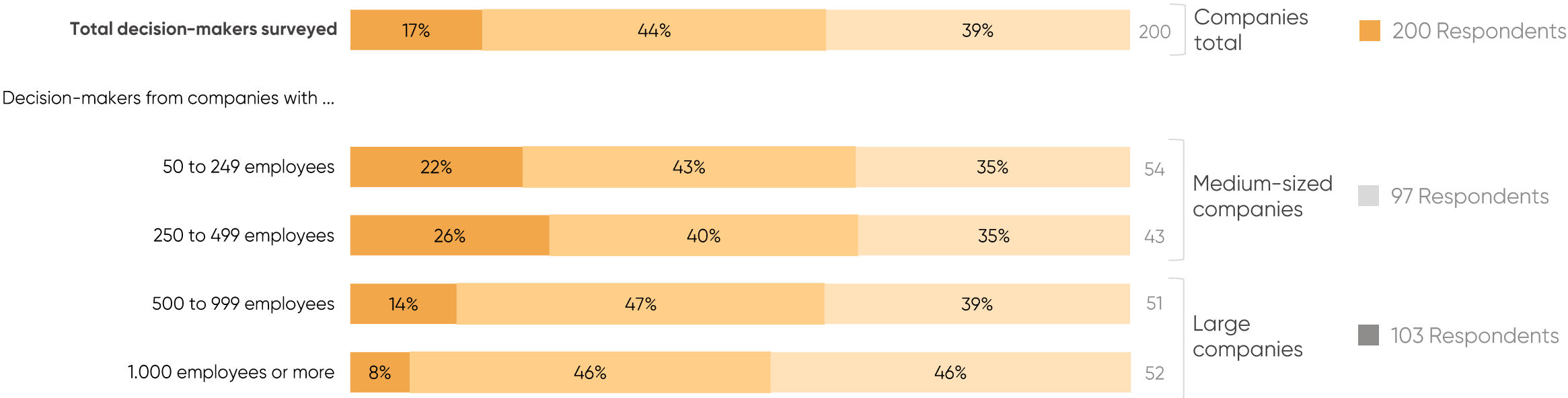
All study participants are decision-makers

Review of the decision-maker role

deciding alone deciding together with others acting in an advisory capacity

Decision-makers by company size

Color codes and case numbers



Assuming that your company or employer is facing decisions or purchases concerning the following areas: How do you decide personally in your company?

Selection/rental of office space

Base: All office space/office real estate decision-makers surveyed, n=200

02

Management Summary

Management Summary

Background

The world of work is changing - and so are office needs

In recent years, the world of work has changed fundamentally: remote work, hybrid models, and digital tools now shape everyday business life in many companies. Since the end of the coronavirus pandemic, many employees have gradually returned to their physical workplaces.

But with this partial return, new questions arise: How relevant is the physical workplace today? What role does the office play in balancing corporate culture, management, and productivity? And how must office space be designed to meet evolving demands?

This study sheds light on these issues from the perspective of office space decision-makers

Commissioned by Design Offices and developed with partners Vitra and Fittkau & Maaß Consulting, the study "From Cultural Space to Productivity Powerhouse: The Comeback of the Office" presents a data-based view of current sentiments and challenges.

In April 2025, 200 office space decision-makers from companies of varying sizes across Germany were surveyed via online panel.



Management Summary

Key Results I

The office has an impact – on culture and productivity

Working in the office continues to play a significant role: 86% of decision-makers agree. Whether viewed as a culture hub or a productivity powerhouse, the office fulfills both functions: the most positively perceived effects are in the areas of culture and communication (74%) and productivity and processes (73%).

Remote work is now common in half of the companies surveyed—but it's not without drawbacks. In organizations with a high proportion of remote work, 76% of decision-makers report negative side effects. Most notably, a loss of community, reduced spontaneous communication, and diminished trust within teams.

Many respondents consider in-person work essential for effective leadership, innovation, and interdisciplinary collaboration.

The pressure to adapt office space is increasing significantly

Almost two-thirds of respondents cite current challenges related to office space: insufficient space, low flexibility, and outdated setups are frequently mentioned.

The data suggests that many companies require modernization and transformation.



Management Summary

Key Results II

Change often stalls due to internal obstacles

More than four in five respondents anticipate major hurdles in planning and implementing changes to office space. In larger organizations, slow decision-making processes and the number of stakeholders involved are significant issues—exacerbated by uncertainty about future external requirements and limited budgets.

This shows: technical feasibility alone isn't enough. Cultural, financial, and organizational factors must also be considered.

Flex offices are becoming a real option

Alternative space models are becoming increasingly attractive. One in five decision-makers express a concrete willingness to use flex offices, shared spaces, or coworking models—among medium-sized companies, this rises to one in four.

Currently, 7% of companies already use these flexible space concepts, with uptake higher among larger organizations.

Flex models are especially appealing when flexibility is required or where remote work negatively affects communication or innovation.



Management Summary

Conclusion

The results clearly show: the office is not becoming obsolete, but rather gaining strategic importance. While hybrid and remote models are now common, physical spaces are being reassessed—not just as cost factors, but as enablers of corporate culture, leadership, and collaboration.

The office is becoming the cultural and identity anchor of modern organizations. It fosters informal exchange, creativity, and personal development—functions that digital environments can't easily replicate. Simultaneously, the pressure to optimize cost and flexibility is increasing.

Forward-looking companies recognize this shift as an opportunity. They use office design as a strategic lever for innovation, retention, and resilience. Shared spaces, coworking, and modular layouts are gaining traction—as is the realization that workplace quality is critical to both appeal and productivity.

The office of the future is not just a place - it is a concept. Those who actively shape this concept, rather than merely managing space, gain a critical edge in the competition for talent, ideas, and innovation.



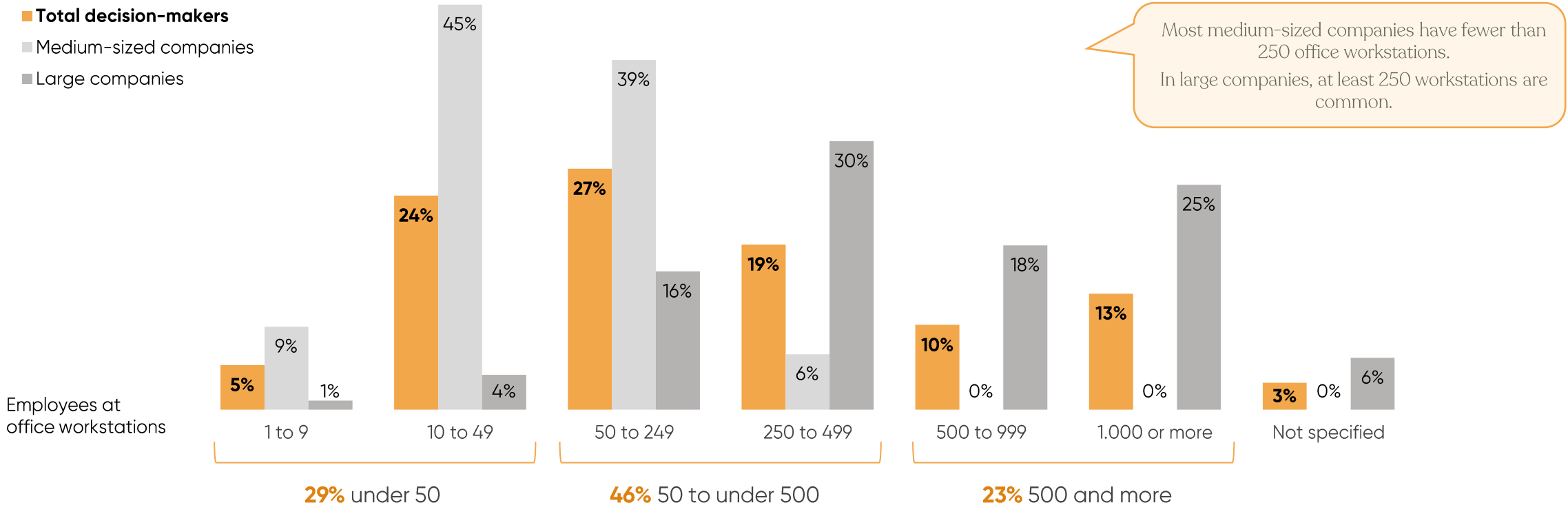
03

Results

Current Office Situation

Number of office workstations in the companies

The majority have a maximum of 500 workstations

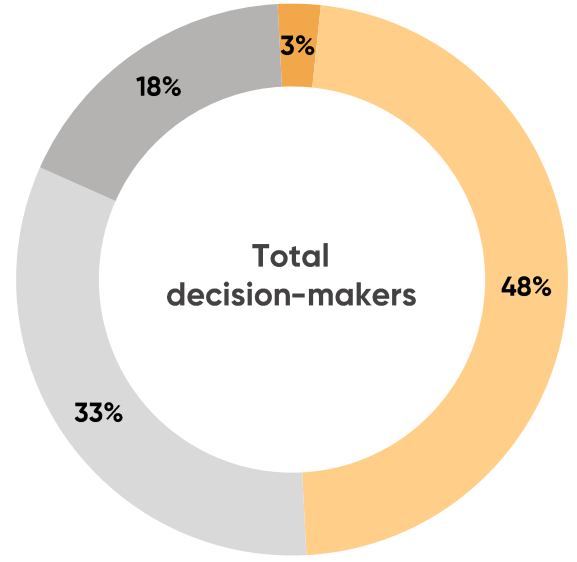


How many employees work at office workplaces in your company in total?
 Base: all office space/office real estate decision-makers surveyed, n=200

Working from home

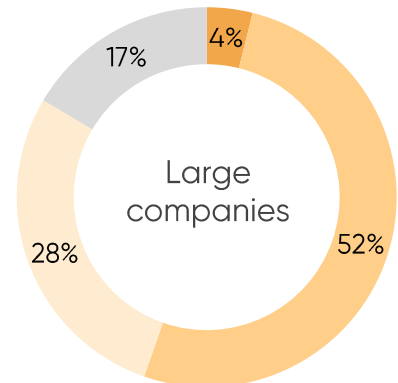
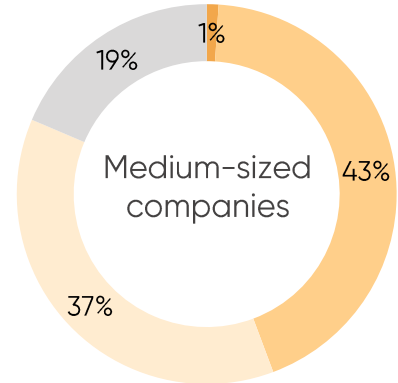
Remote work is not common in all companies

In half of the companies surveyed, employees work from home at least once per week. In the other half, remote work is either uncommon or not practiced at all. The larger the company, the more likely it is that employees work remotely.



Home office days per week

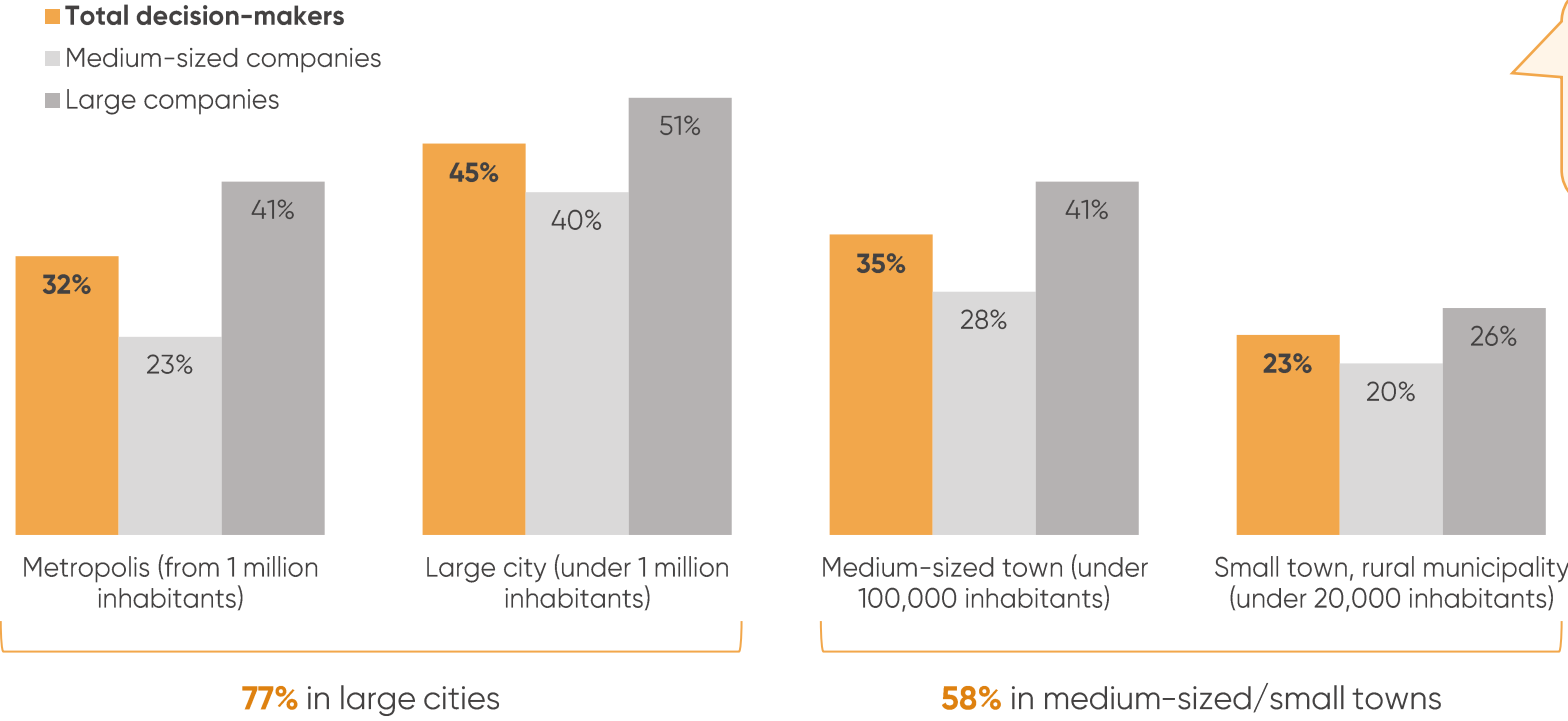
- 3 to 4 days
- 1 to 2 days
- Less
- None



What is the usual practice in your company?
Approximately how much working time is spent by employees working from home or remotely?
Base: All office space/office real estate decision-makers surveyed, n=200

Where offices are located

Primarily in urban areas



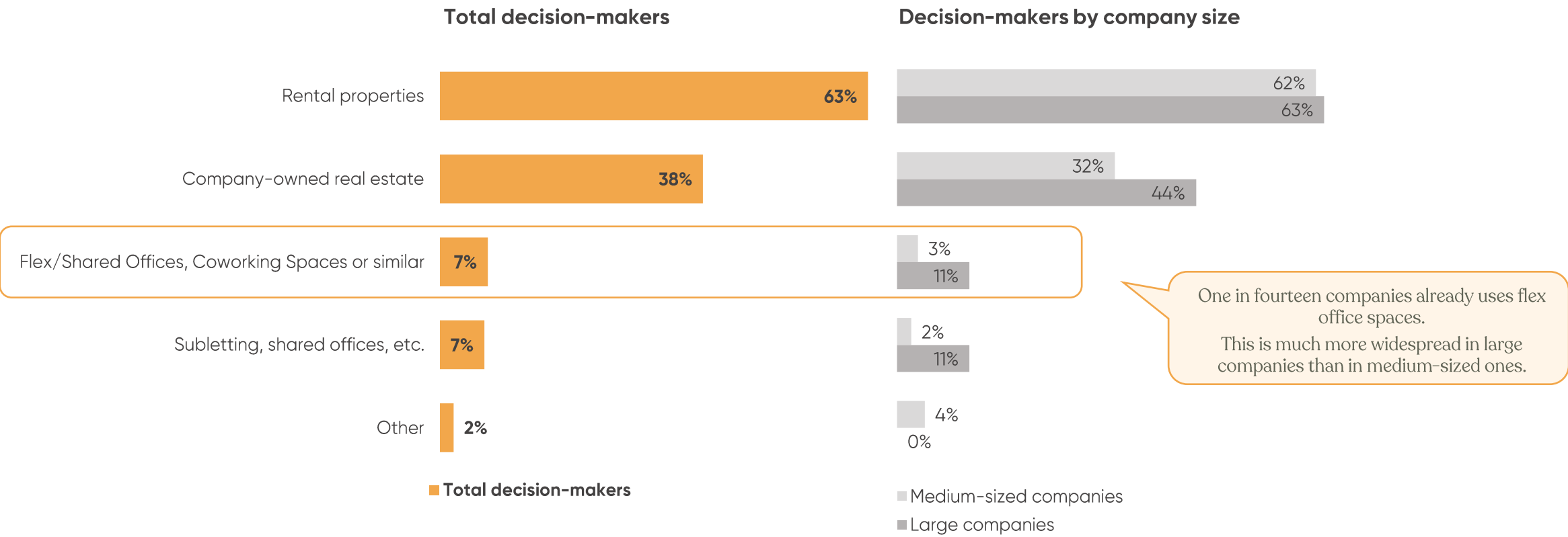
Almost all large companies (over 90%) have office space in metropolitan areas and large cities.

Among medium-sized companies, the figure is less than two thirds.

What locations does your company have office space in?
Base: All office space/office real estate decision-makers surveyed, n=200
Multiple answers possible

Types of office spaces

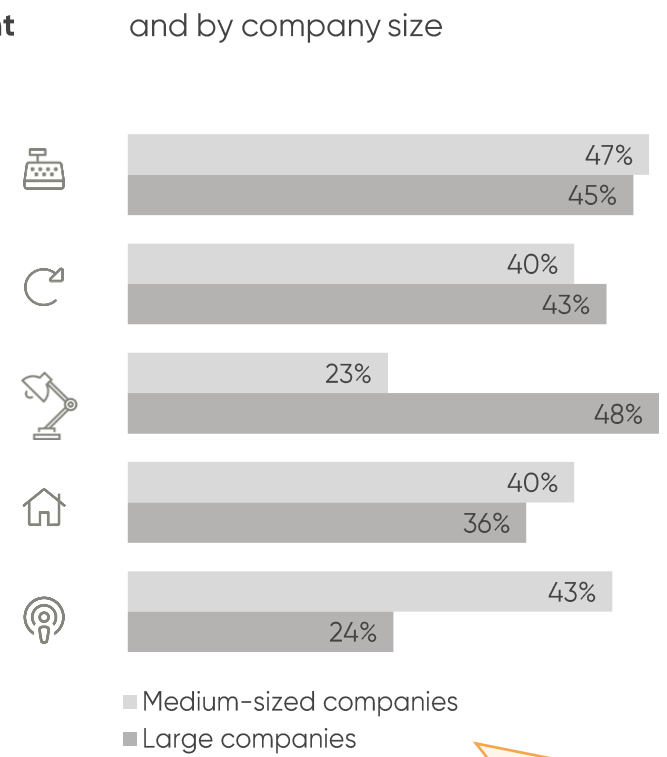
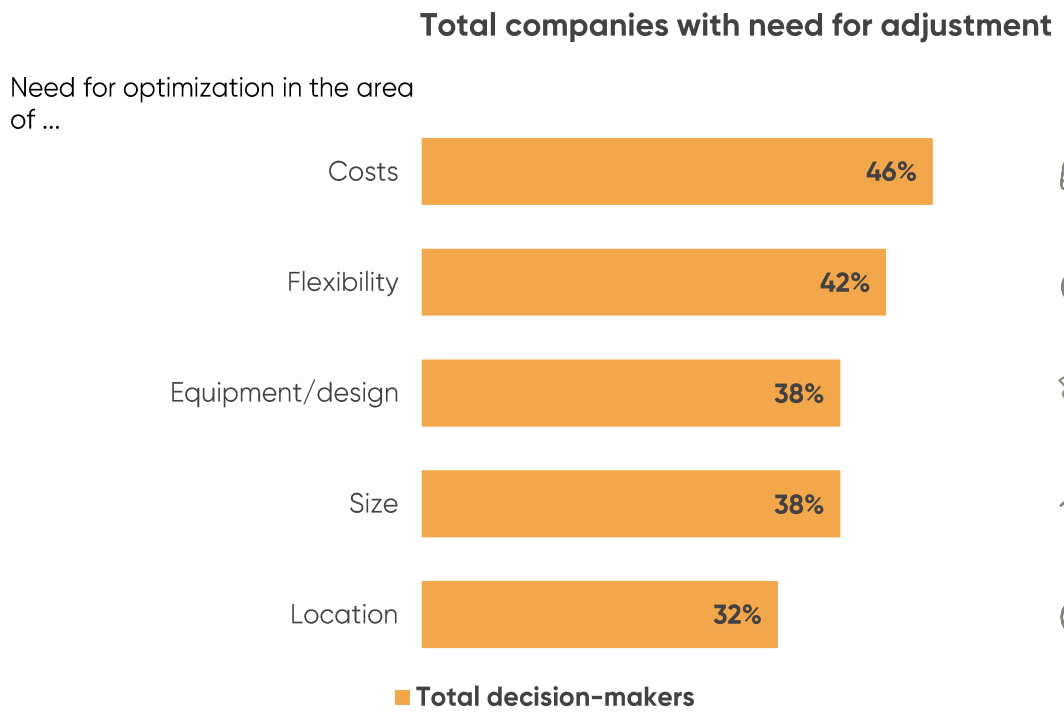
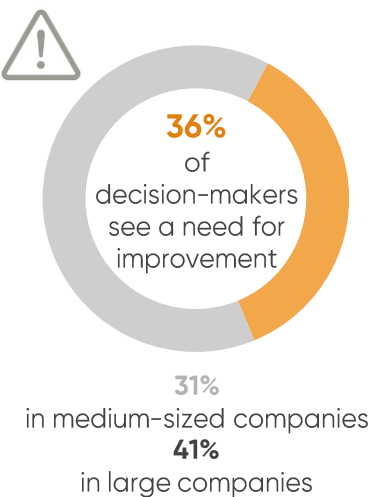
Most offices are located in rented properties



In which type(s) of real estate are the office spaces that your company uses located?
Base: All office space/office real estate decision-makers surveyed, n=200
Multiple answers possible

Assessment of the current office space situation

There is a need for optimization for more than one third



**When you evaluate the office space situation of your company as a whole:
How do you assess it with regard to current and future requirements?**

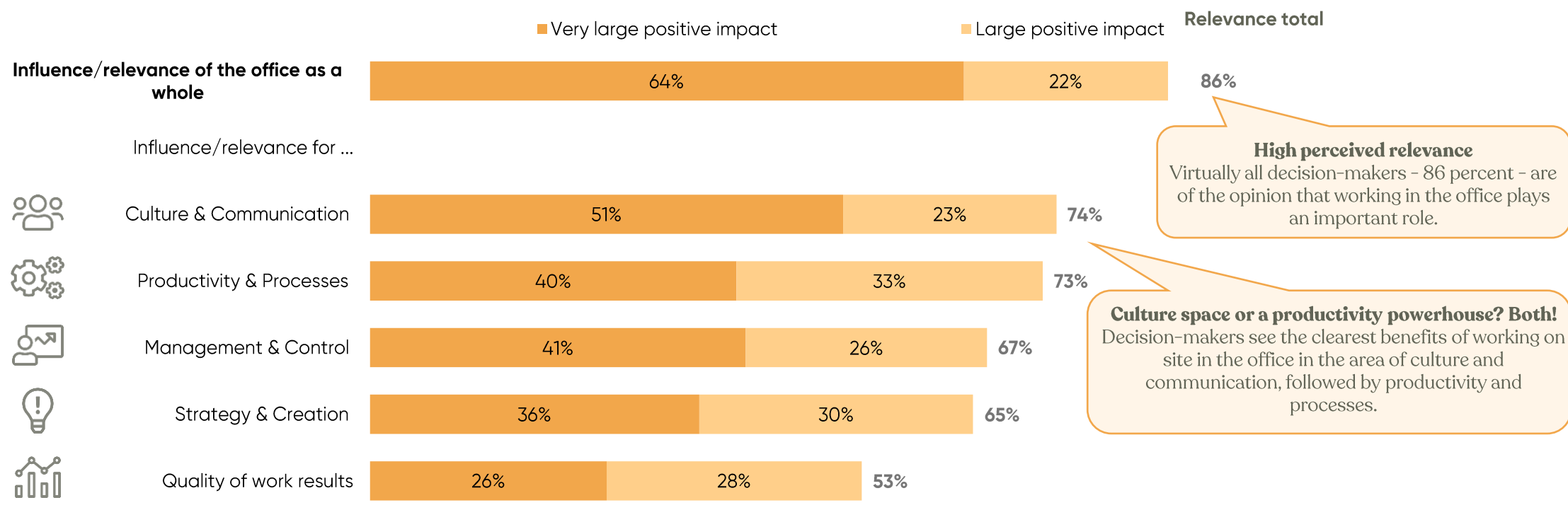
Base left: All office space/office real estate decision-makers surveyed, n=200
Base right: Subsample – Decision-makers who see a need for optimization, n=72

Particularly among decision-makers from large companies, there is a need for improvement—especially regarding cost, flexibility, and furnishings.

Office functions and challenges

Importance of offices for various sectors

Majority of decision-makers see positive influences

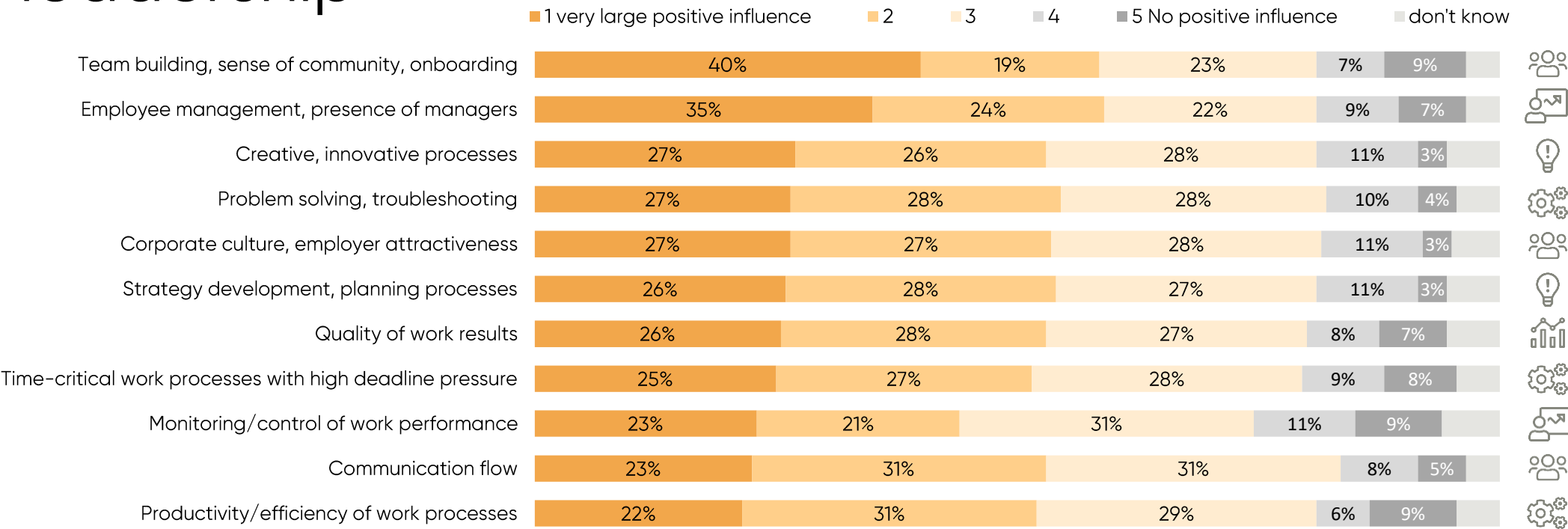


If you think about how working in the office differs from working from home: For which areas of your company does working on site in the office have a particularly important function or what does it have a major positive influence on?

Base: All office space/office real estate decision-makers surveyed, n=200

Specific positive effects of office work

Highest relevance for employee retention and leadership



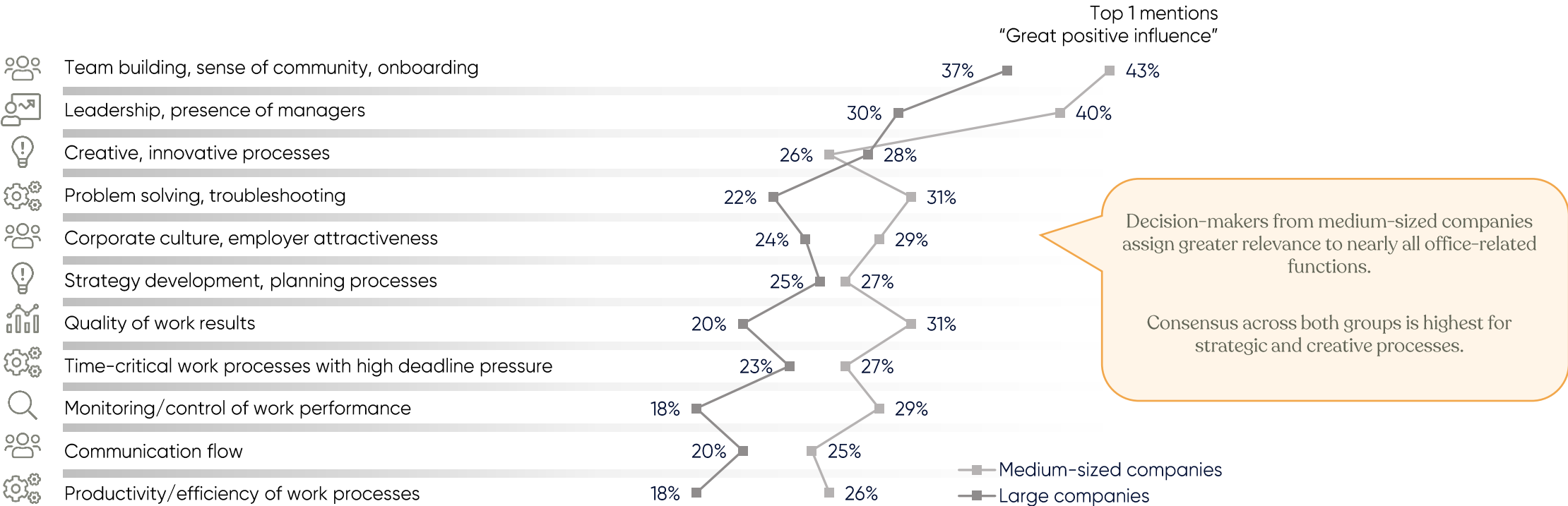
Effects on interpersonal aspects are considered to be even greater than those on productivity/efficiency.

If you think about how working in the office differs from working from home, for which areas of your company does working on site in the office have a particularly important function or what does it have a major positive impact on?

Base: All office space/office real estate decision-makers surveyed, n=200

Offices: Functions and positive impact

Smaller companies appreciate the benefits in particular

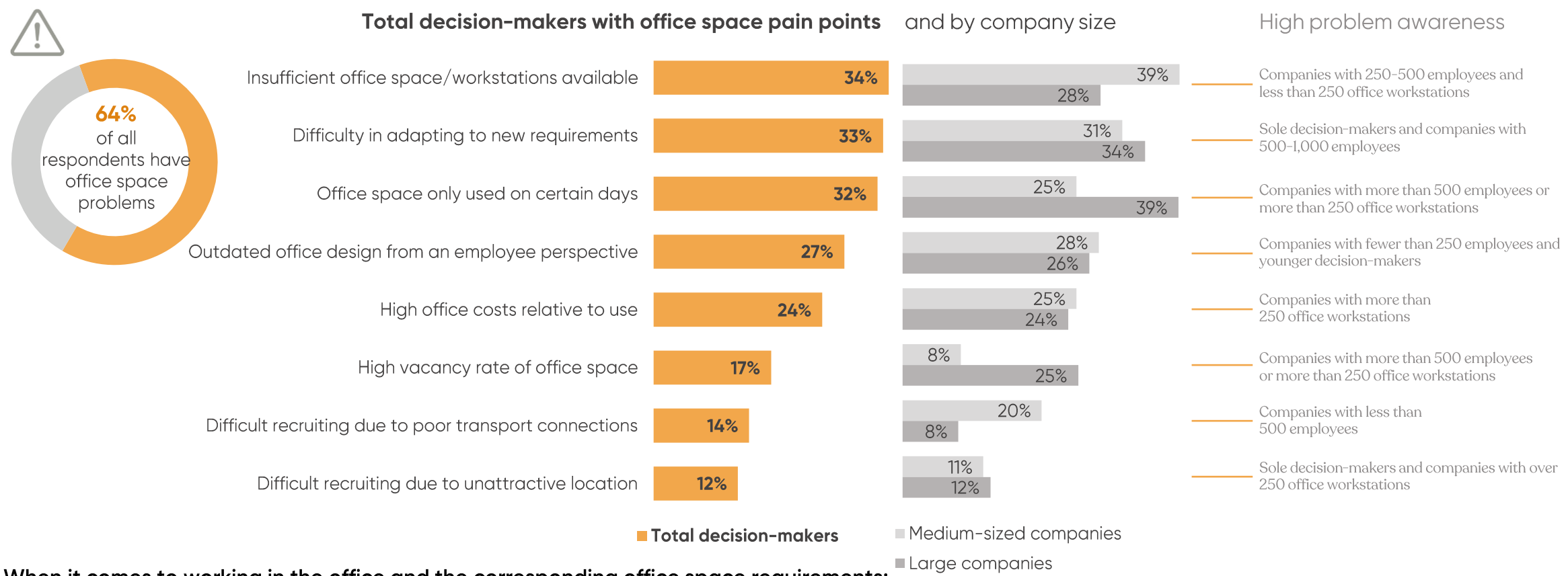


If you think about how working in the office differs from working from home, for which areas of your company does working on site in the office have a particularly important function or what does it have a major positive impact on?

Base: All office space/office real estate decision-makers surveyed, n=200

Companies' issues regarding office spaces

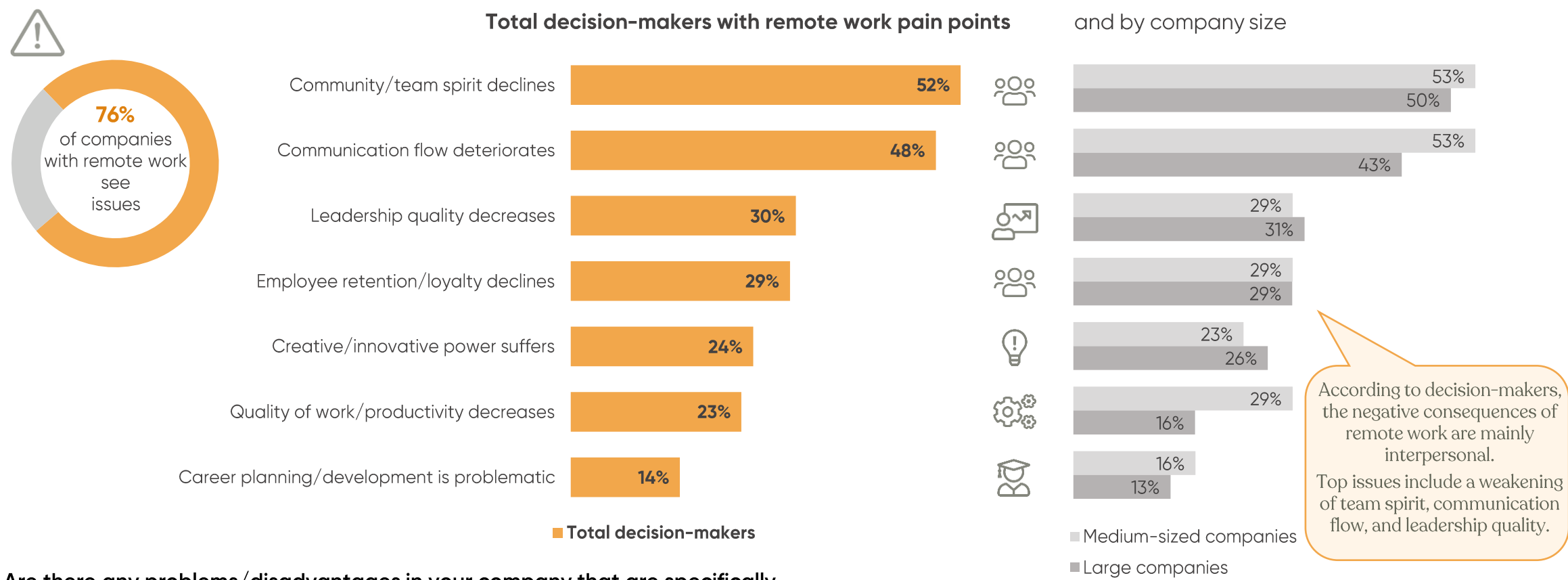
Around two-thirds perceive problems



When it comes to working in the office and the corresponding office space requirements:
In your view, are there any current problem areas or challenges for your company?
Base pie chart: All office space/office real estate decision-makers surveyed, n=200
Base bar charts: Office space/office real estate decision-makers who reported issues, n=127
Multiple answers possible

Issues specifically due to remote work

Team spirit and communication suffer in particular



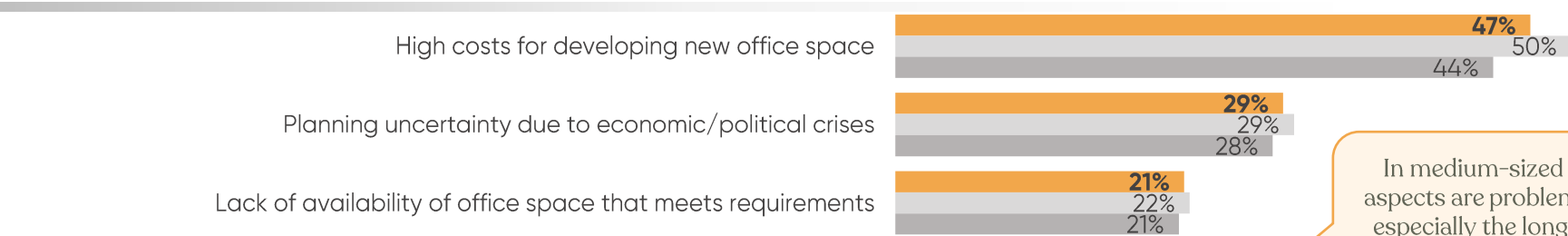
Are there any problems/disadvantages in your company that are specifically attributable to working from home?
Base pie chart: Decision-makers whose companies also offer remote work, n=163
Base bar charts: Subgroup reporting remote work challenges, n=124
Multiple answers possible

Barriers to changes in office space

External as well as internal factors interfere

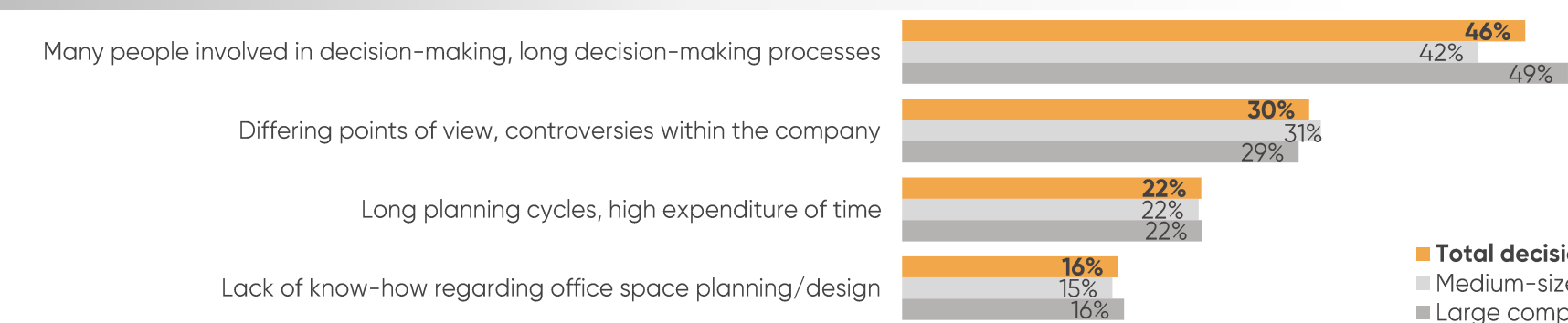


External factors in companies where obstacles exist



In medium-sized companies, cost aspects are problematic, in large ones, especially the long decision-making processes.

Internal factors in companies where obstacles exist



■ Total decision-makers
■ Medium-sized companies
■ Large companies

Please assume that your company was about to make major changes in the area of office space: What would you classify as the greatest obstacles to their planning and implementation?

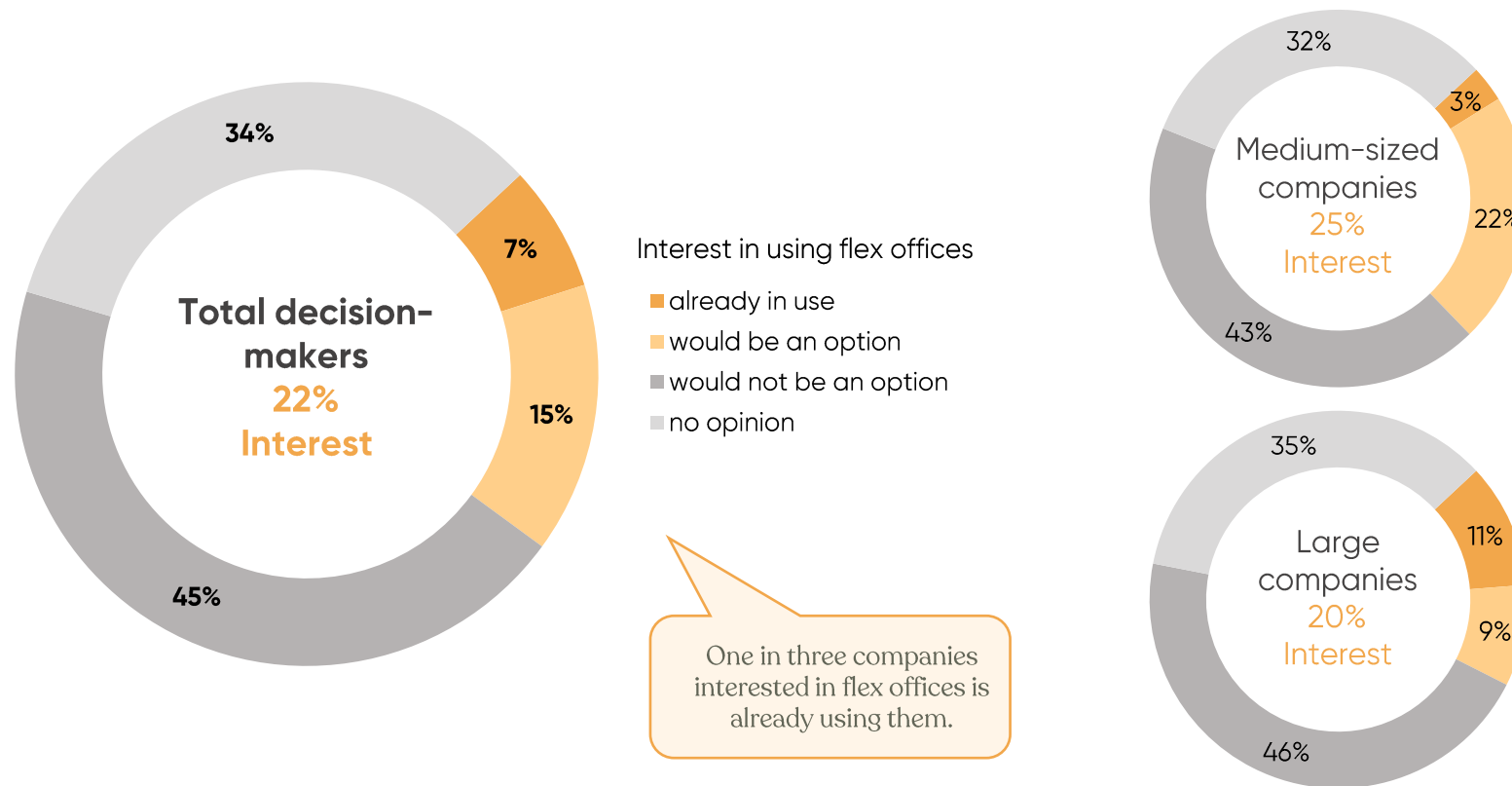
Base pie chart: All office space/office real estate decision-makers surveyed, n=200

Base bar chart: Office space/office real estate decision-makers reporting challenges, n=164

Multiple answers possible

Flex Office usage interest

One in five decision-makers expresses interest



In many cities, it is possible to use office space in flex offices, shared offices, coworking spaces, etc., whether by individual employees, teams or entire company divisions.

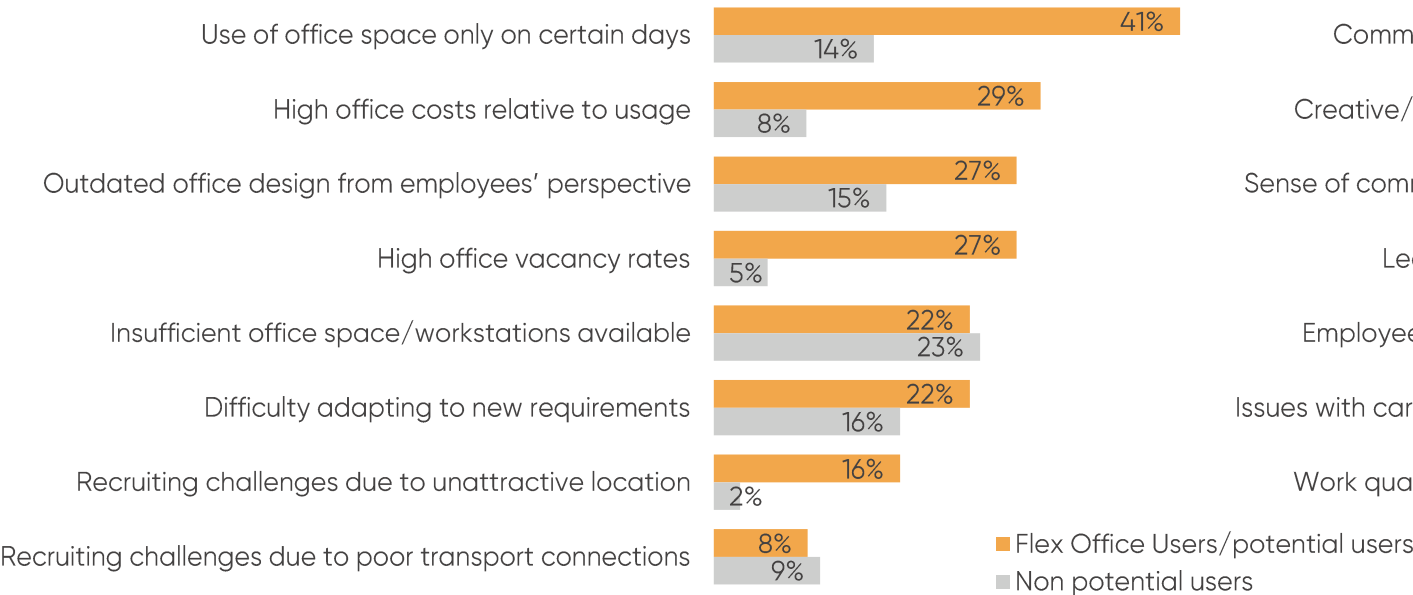
Would this be an option for your company - or what do you see as the pros/cons?

Base: All office space/office real estate decision-makers surveyed, n=200

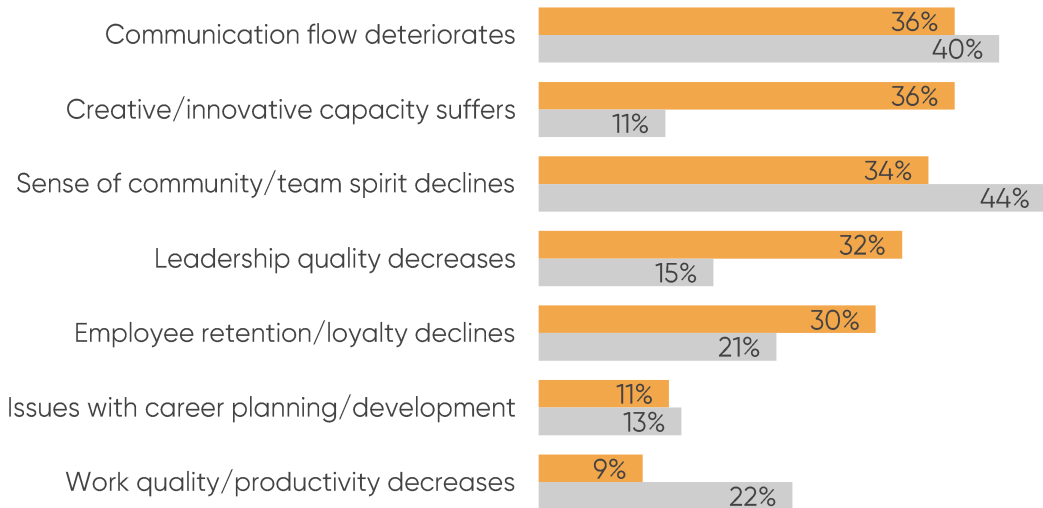
Flex Offices: Profile of potential users

Interest depends on problem situation

Drivers linked to office space issues



Drivers linked to remote work issues



Flex offices are considered particularly relevant when office space is only needed on certain days or when remote work has specific negative effects.

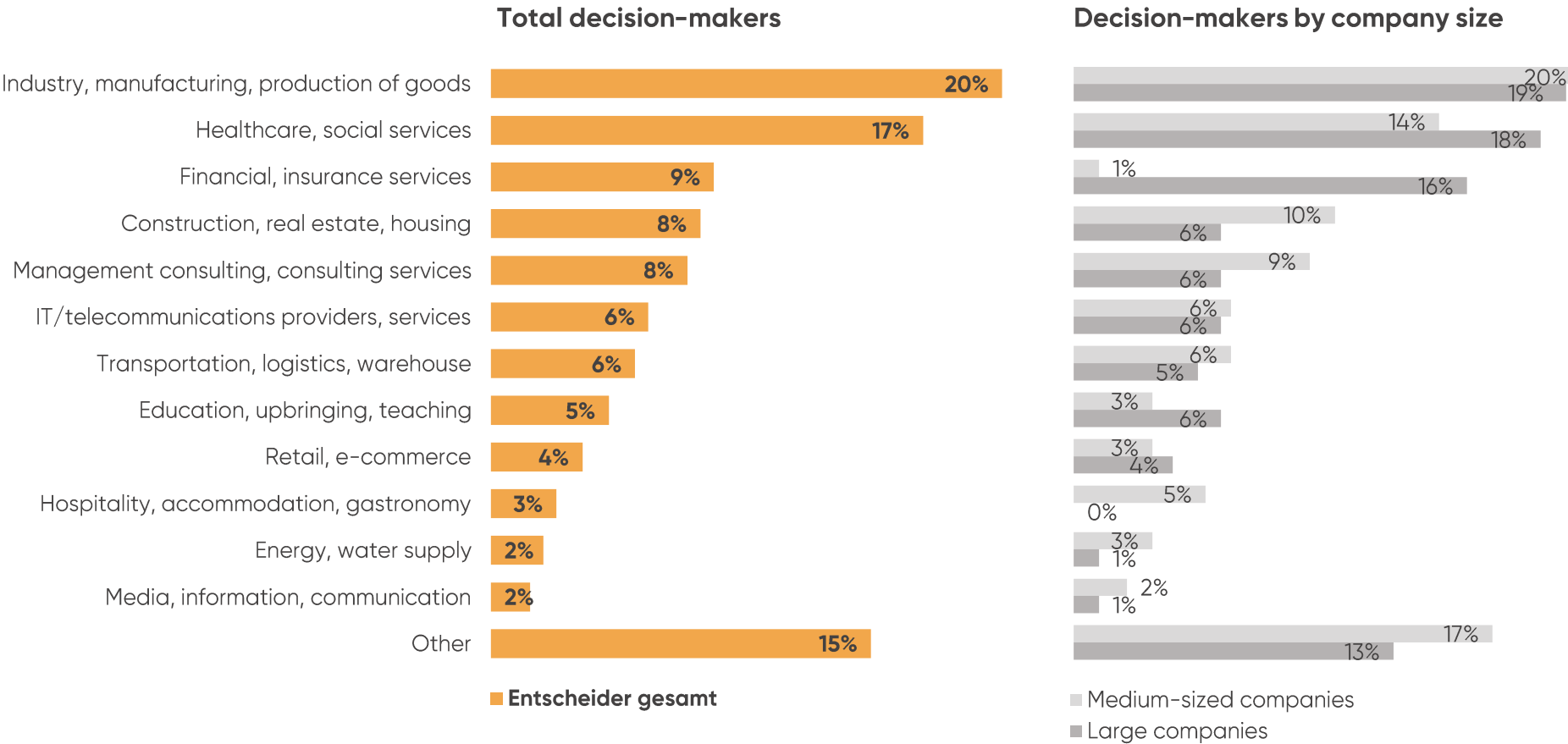
In many cities, companies have the option to use office space in flex offices, shared offices, coworking spaces, etc. – whether by individual employees, teams, or entire business units. Could this be an option for your company – and what are the arguments for or against it from your perspective?

Base left: All office space/office real estate decision-makers surveyed, n=200
Base right: Decision-makers whose companies (also) work remotely, n=163

Company and respondent profiles

Industry distribution

Strong representation from industry and healthcare

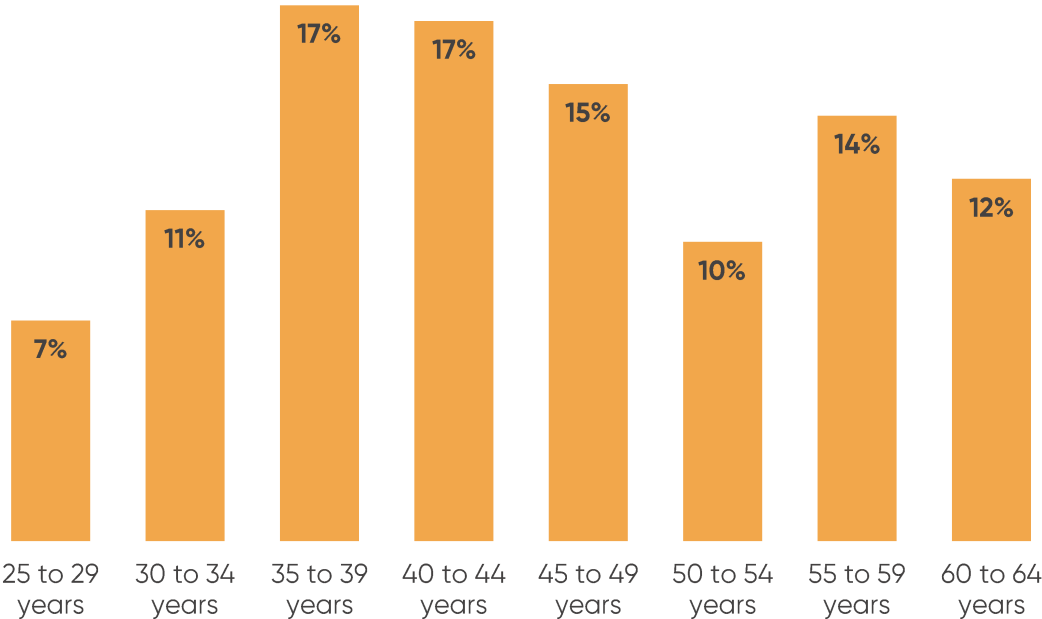


In which industry is your employer or the company you work for primarily active?
Base: All office space/office real estate decision-makers surveyed, n=200

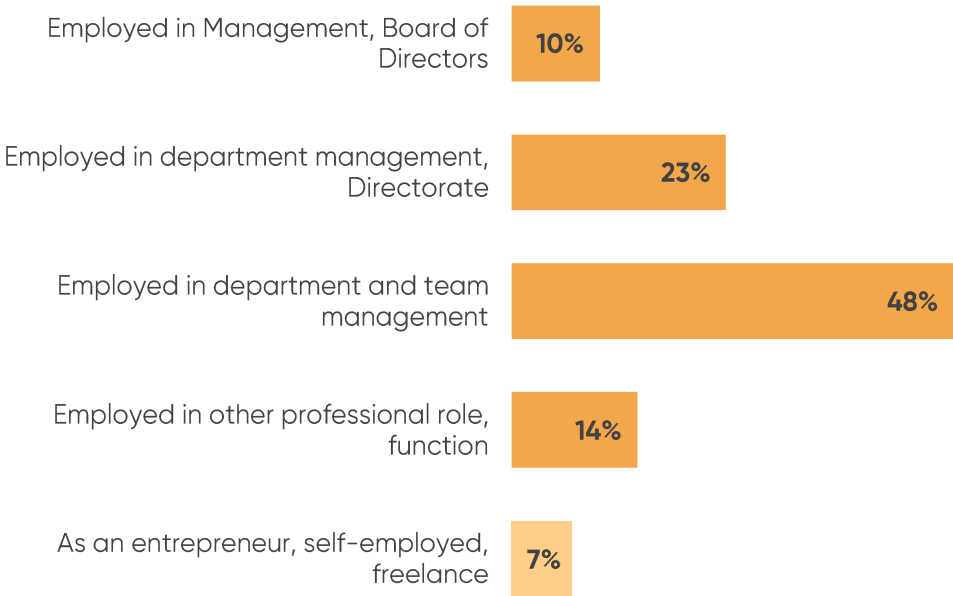
Age and professional status of the respondents

Wide age range – Majority in Leadership positions

Age of office space/office real estate decision-makers



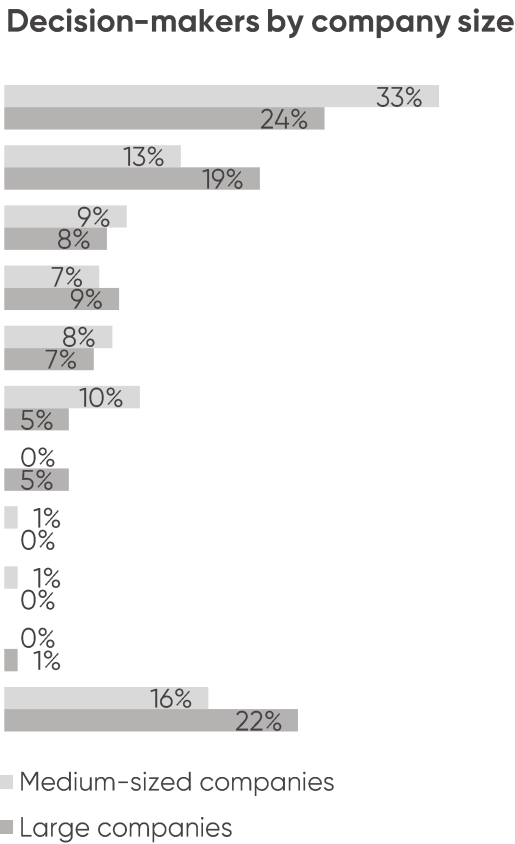
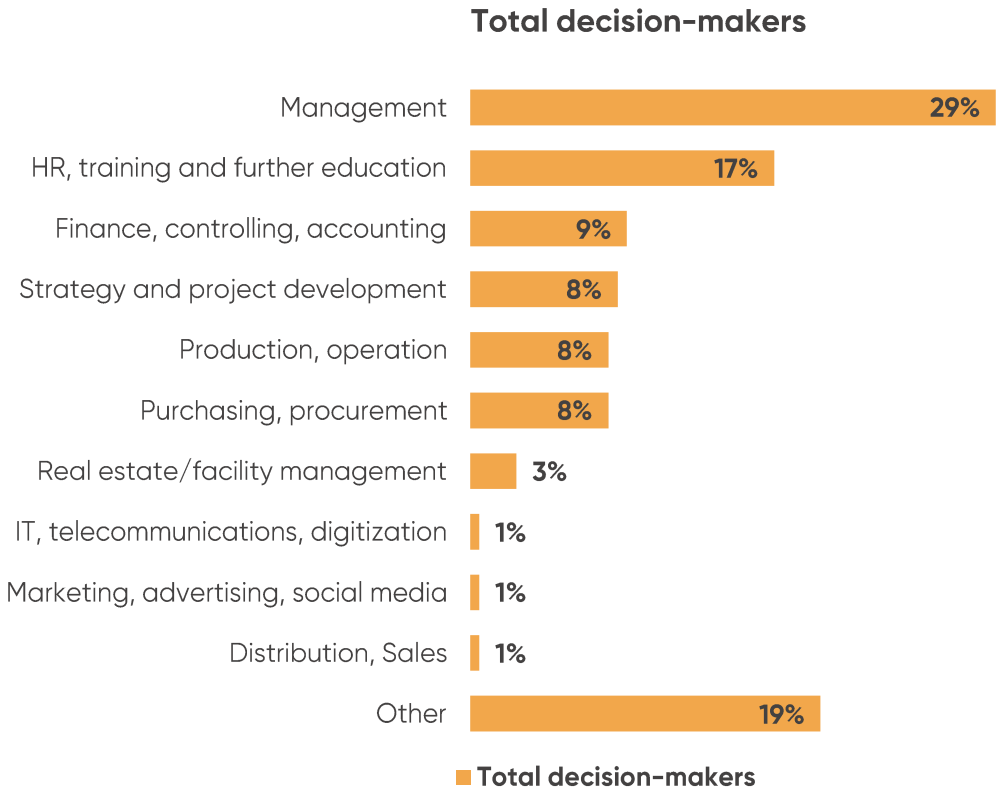
Occupational status of office space/office real estate decision-makers



Which of the following best describes your current job status? How old are you?
Base: All office space/office real estate decision-makers surveyed, n=200

Functional departments

Study participants from various departments



04

Contact information

Study Partners

Background information

DESIGN OFFICES

Design Offices is the market leader for flexible workspaces in Germany. Since 2008, the company has been shaping new working environments and now operates around 50 locations with approximately 260,000 square meters in 15 German cities. Design Offices serves more than 2,000 office clients with a total of 15,000 workstations nationwide. Its clients include renowned companies such as Alibaba, TikTok, Moderna, Roche, Marc O'Polo, Salesforce, Sparda-Bank, Villeroy & Boch, and Doctolib. In addition to modern office spaces, Design Offices offers users special services such as exclusive community events, and catering, as well as flexible spaces for all kinds of business events. The company employs 500 people and is headquartered in Nuremberg. <https://www.designoffices.de/>

Vitra

Vitra believes that environments shape our feelings and thoughts – at home, at work, and on the move. Every day, the Swiss furniture manufacturer works to improve these environments through the power of design. Vitra is a third-generation family business and pursues not only commercial but also cultural and ecological missions. Environmental responsibility is reflected in every action Vitra takes – from how products are developed and manufactured to raw material sourcing and supply chain organization. Every new insight is seen as an opportunity for continuous improvement. <https://www.vitra.com>

Fittkau & Maaß Consulting

Since 1995, Fittkau & Maaß Consulting has supported companies such as Beiersdorf, Consorsbank, Green Planet Energy, Parship Elite Group, Scholz & Friends, and Deutsche Telekom with trend studies as well as customized market research and consulting services – helping them design and optimize their strategies, products, services, and marketing campaigns with a customer-centric approach. <https://www.fittkaumaass.de>

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