VERGE SENSE

JANUARY – OCTOBER 2025

200+ GLOBAL ENTERPRISES

50 COUNTRIES

200M+ SQFT

2025 WORKPLACE OCCUPANCY & UTILIZATION INDEX

8TH EDITION

The 6 Dynamics Redefining the Adaptive Office

POWERED BY MERIDIAN

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Introduction

In a year defined by continuous movement, real estate and workplace leaders face a new reality: stability is no longer the objective, adaptability is. Patterns of use are shifting across teams, industries, days of the week, and even hour to hour. What once felt predictable now behaves like a living system, reshaping “normal” faster than legacy planning cycles can adjust.

This edition of the Index unpacks how that motion truly works, revealing the gaps between averages and lived experience, the pressure points that create friction, and the shifting rhythms that make every industry unique. Together, these insights point toward a new era of workplace strategy: one where organizations win not by locking into a static plan, but by building systems that are flexible and responsive in real time.

To make that journey clear, this report breaks the year’s findings into the core dynamics that shaped workplace performance in 2025 and the signals real estate and workplace leaders need to plan for what comes next.

Methodology & Definitions

The Largest Workplace Occupancy and Utilization Data Set

The 2025 Workplace Occupancy & Utilization Index features active and passive usage data that was captured anonymously by VergeSense occupancy sensors and analyzed in the Meridian Platform.

Dates Analyzed: January-October 2025

200M+ SqFt

50 Countries

250,000+ Spaces

200+ Global Enterprises

Methodology & Definitions - Metrics

Total Time Usage

This metric measures the combined amount of time spaces are either passively or actively used over a given period. It is calculated by dividing the time spaces are used, both actively and passively, by the total time measured.

$$\frac{\text{(Time actively used + Time passively used)}}{\text{Total time measured}}$$

Active Time Usage

This measures the amount of time spaces are actively used over a given period. It is calculated by dividing the total active time (when spaces are actively used by people) by the total time measured.

$$\frac{\text{Time actively used}}{\text{Total time measured}}$$

Peak Capacity Usage

This metric calculates the peak person count divided by the total capacity of the space(s) within a selected timeframe. It's essential for determining if spaces can comfortably handle periods of high activity.

$$\frac{\text{Peak person count}}{\text{User-defined capacity of the space}}$$

Space Count

This the total number of measured space types.

Methodology & Definitions - Metrics

Average Capacity Usage

This metric measures how effectively spaces are used over time. It is calculated by dividing the average number of people present in measured spaces over time by their combined capacity.

$$\frac{\text{\# of people in a space}}{\text{User-defined capacity of the space}}$$

Shortages

A shortage is a condition when a group of similar spaces (typically on the same floor and of the same type) are 80% or more occupied during a given hour.

Average Shortage Rate:

The average percentage of hours in which a shortage occurs across VergeSense's portfolio for 2025, measured Monday–Friday between 8:00 AM and 6:00 PM, calculated by either hour of day or day of week.

Occupied

A space is considered occupied when it registers presence for at least 15 continuous minutes within a given hour. This threshold helps filter out brief or incidental use and focuses on meaningful occupancy.

Average Occupied Capacity Usage

This metric measures how full spaces are, on average, when they are actively in use. It is calculated by dividing the average number of people present during active use periods by the total capacity of those spaces. It reflects the intensity of use during occupied times, not overall utilization.

Methodology & Definitions - Space Types

Normalized Across All Measured Spaces

Enclosed Focus

Traditional private offices and non-traditional enclosed areas like phone booths or quiet rooms.

USED FOR

Heads-down individual work.

Open Focus

Individual workstations, desks, benches, or pods located in open areas.

USED FOR

Solo work with varying levels of privacy.

Enclosed Collaboration

Traditional conference rooms and non-traditional enclosed team spaces (like soft-seating or reconfigurable rooms).

USED FOR

Group work, meetings, or hybrid syncs.

Open Collaboration

Open team tables, soft seating areas, cafes, booths, or communal zones.

USED FOR

Informal collaboration or quick huddles without booking.

Other

Spaces that don't directly support focus or collaboration—such as wellness rooms, storage areas, lobbies, or undefined spaces.

SECTION

Beneath the Averages: Why Planning Requires Seeing Both the Everyday, and the Exceptional

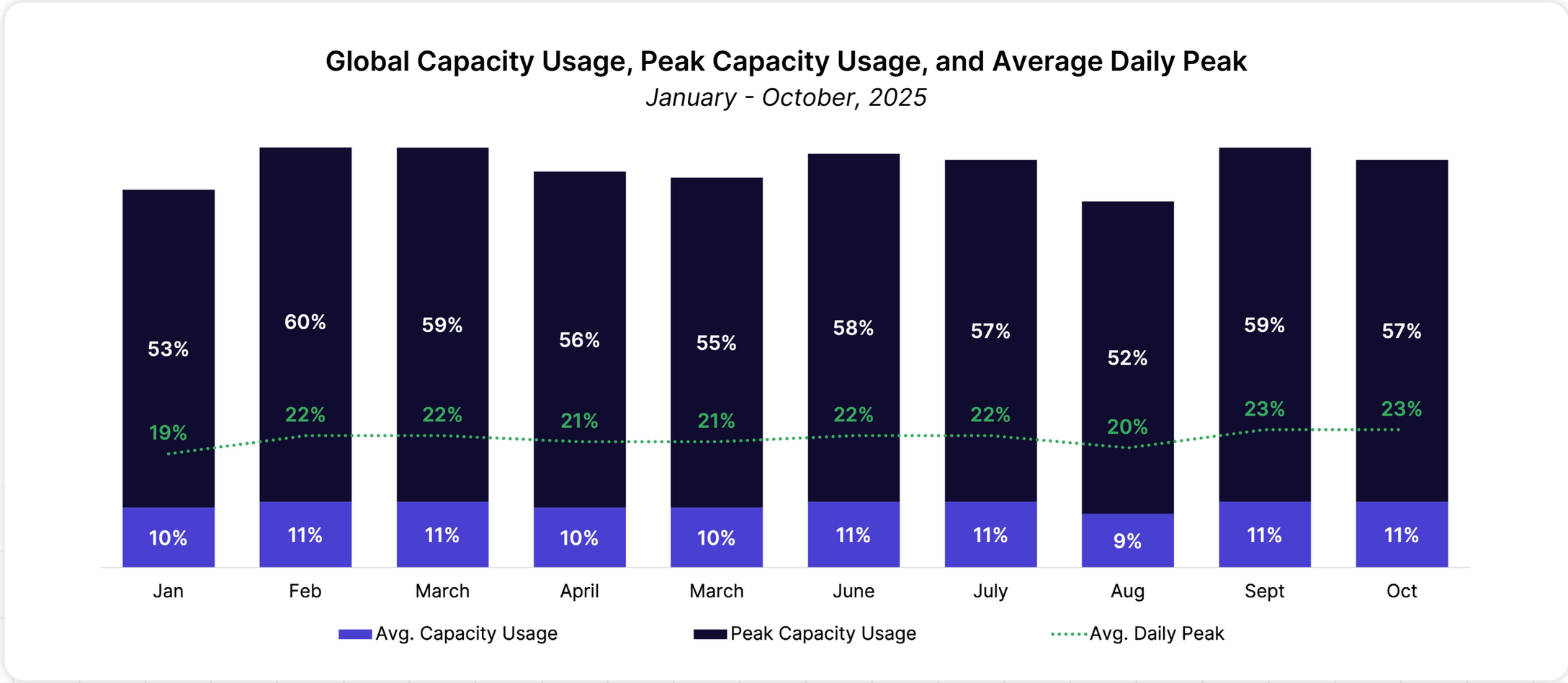
On the surface, workplace occupancy and utilization trends appear consistent. Averages suggest predictability: attendance that ebbs and flows, rooms that appear busy but manageable, and a building comfortably under capacity. But averages obscure the moments when the workplace actually breaks: sharp spikes, tight pressure windows, and patterns that create friction long before the numbers catch up.

To understand what defines an adaptive office, we need to look at these moments. The real motion in a hybrid workweek isn't about how many people come in — it's about when they converge and how sharply their needs overlap.

DYNAMIC 1

Beneath the Averages: Why Planning Requires Seeing Both the Everyday, and the Exceptional

Averages Obscure the Moments That Matter



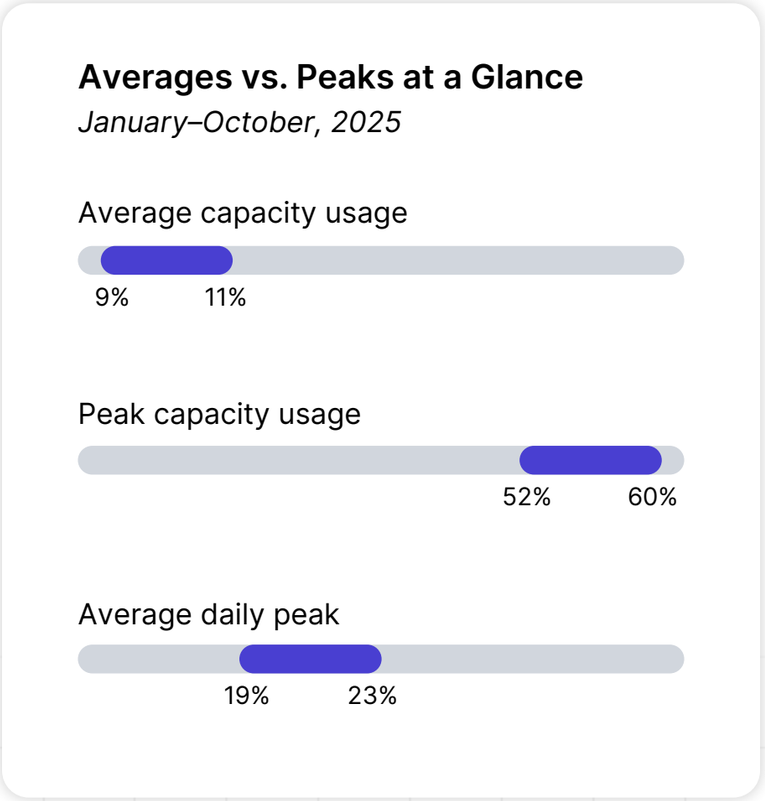
DYNAMIC 1

Beneath the Averages: Why Planning Requires Seeing Both the Everyday, and the Exceptional

Averages Obscure the Moments That Matter

Global occupancy behavior in 2025 continues to follow clear, recurring rhythms. Across the year, average capacity usage held between 9–11%, signaling steady attendance patterns even as hybrid policies continue to evolve. But the real story emerges when we look beyond the averages. Each month, peak capacity usage climbed into the 52–60% range, and average daily peak rose to 19–23%, revealing the concentrated periods when workplaces actually fill and space strains under demand.

These dynamics repeat month after month. Averages remain modest, but peaks consistently triple or quadruple them—showing how quickly activity compresses into midweek, midday windows. Planning from the average alone suggests underuse; planning from the peaks shows workplaces operating at meaningful intensity during the hours when employees most need space to work and meet.



TAKEAWAY

This is why evaluating all three metrics—average capacity usage, peak capacity usage, and average daily peak—is essential for understanding true utilization.

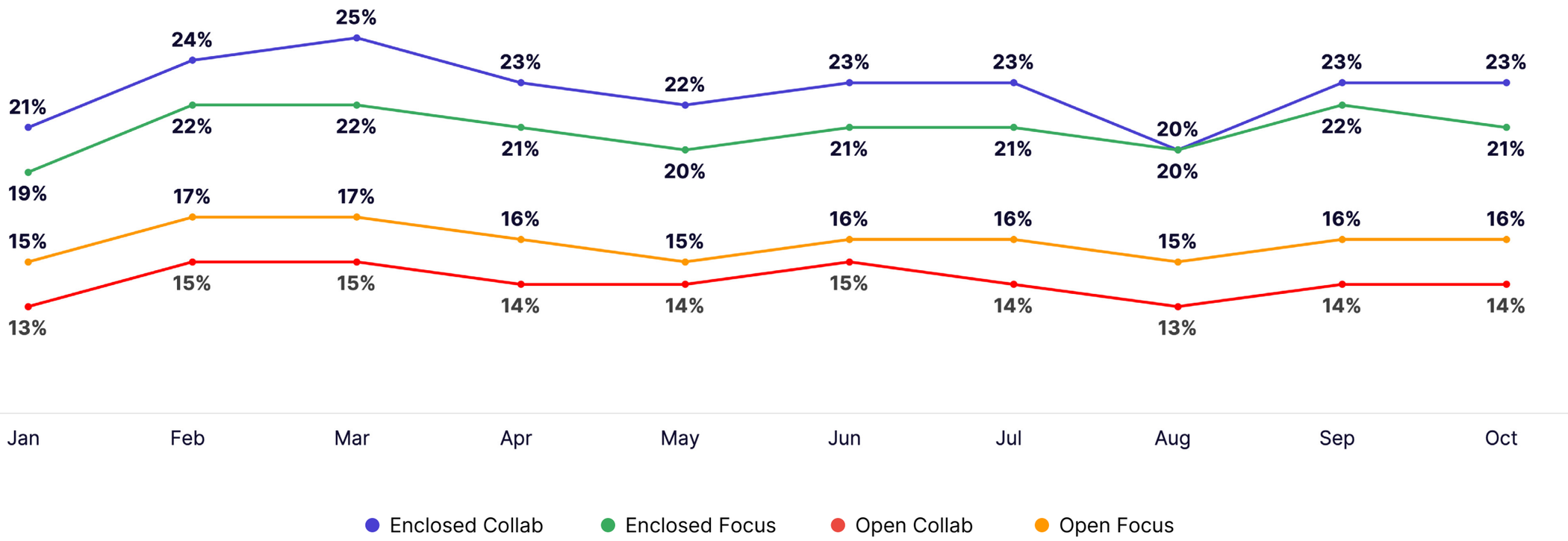
Averages describe how full the office looks across the entire month. Peaks reveal when it actually fills, where friction appears, and how much flexibility the system needs to absorb demand without breaking.

Leaders who plan around averages risk missing the real constraints employees face. Leaders who plan around peaks can create workplaces that flex with behavior instead of falling behind it.

DYNAMIC 2

Beneath the Averages: Why Planning Requires Seeing Both the Everyday, and the Exceptional

Hybrid Work Intensifies Activity, But Not in Predictable Ways



DYNAMIC 2

Beneath the Averages: Why Planning Requires Seeing Both the Everyday, and the Exceptional

Hybrid Work Intensifies Activity, But Not in Predictable Ways

Total time usage (including both active and passive time usage) reveals a pattern that averages alone miss: hybrid work is far less predictable. Across 2025, active time usage increased across all space types — with enclosed collaboration rising into the mid-20% range, enclosed focus stabilizing around 20–22%, and open collaboration and open focus holding steady in the mid-teens. Yet the month-to-month rhythms differ sharply between enclosed and open environments, showing that hybrid demand doesn't move in a uniform or linear way.

Passive time introduces a different rhythm. In enclosed spaces, passive time usage stays low and stable (3–6%), indicating intentional, efficient use. In open areas, however, passive time usage rises into the 5–10% range as employees leave belongings to hold a spot and shift elsewhere for calls or collaboration. The space appears occupied even when work is happening elsewhere — creating a false sense of scarcity and reducing real availability long before true demand peaks.

Active Time Usage Across Enclosed Space Groups

TAKEAWAY

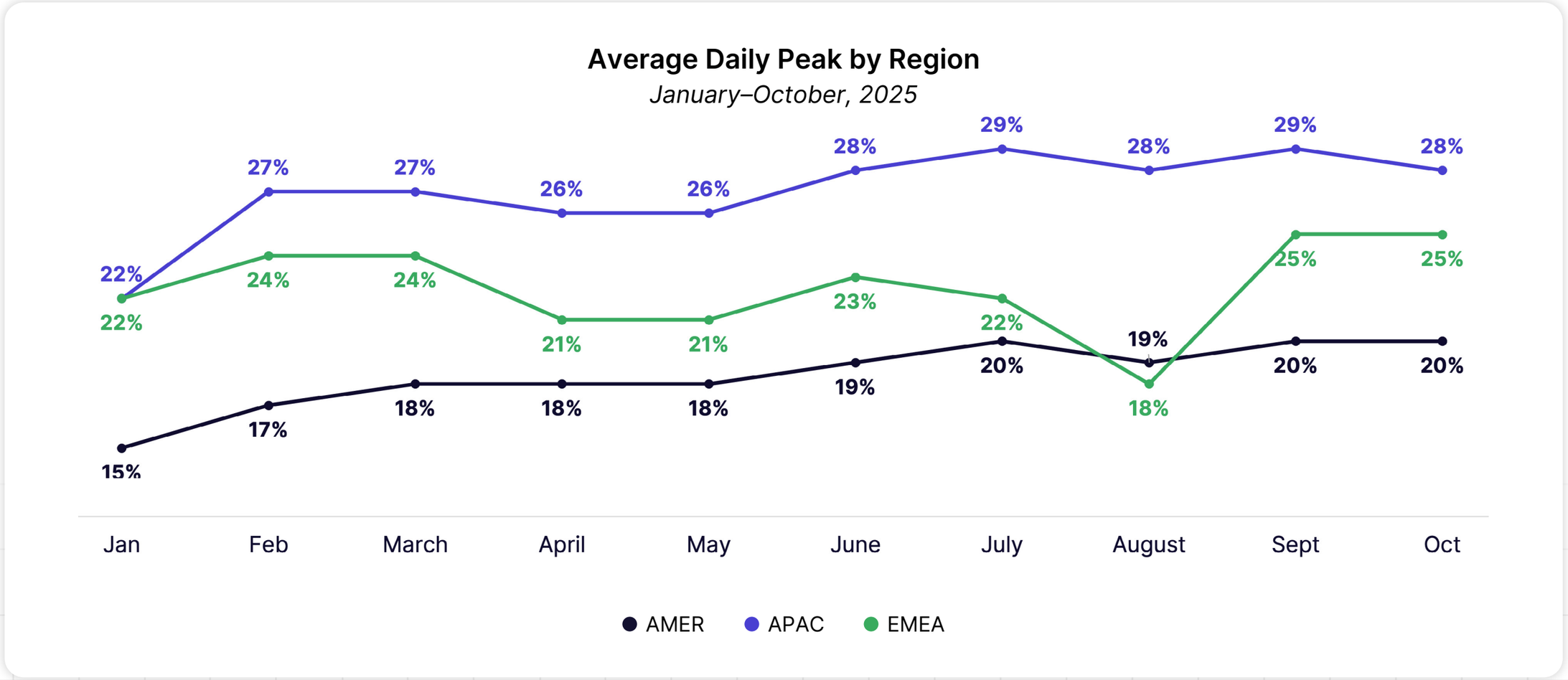
Taken together, the active–passive patterns show that hybrid work does not follow smooth weekly cycles; it moves in waves shaped by shifting work modes, project rhythms, and team dynamics.

Total time usage across all space types remains moderate, but the distribution of how space is used shifts meaningfully month to month and space to space. For example, active time usage in enclosed collaboration ranges from 21–25%, passive time usage in open areas fluctuates from 8–10% as employees leave belongings to hold space, and passive time usage in enclosed focus holds between 5–6%.

Designing an adaptive office means planning for these shifting usage patterns, not a predictable or steady model.

DYNAMIC 3

Peaks Vary by Region — And Your Plan Needs to Flex with Them



DYNAMIC 3

Peaks Vary by Region — And Your Plan Needs to Flex with Them

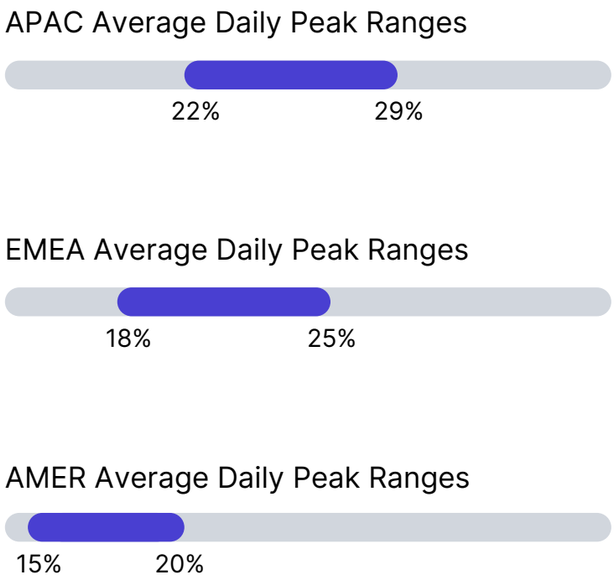
Average daily peak usage makes one truth clear: **every region has its own rhythm.**

- In 2025, APAC continues to show the highest average daily peak, beginning the year at 22%, rising to 28–29% across summer and early fall, and never dropping below 22%.
- EMEA shows a more variable pattern, ranging from 18% to 25%, with sharper dips and recoveries tied to seasonal norms.
- AMER, meanwhile, maintains the lowest average daily peak by comparison, starting at 15% and topping out around 20%, reflecting a more flexible and less predictable in-office cadence.

These differences matter, not because one region is “better utilized” than another, but because they illustrate how surges occur depending on local norms, culture, and collaboration models.

Different Regions, Different Peaks

January–October, 2025



TAKEAWAY

Regional peak trends don’t break the system; planning as if they don’t exist does, so it can be helpful to understand how regional trends can help predict or represent your employee behavior.

Organizations that align strategy to each region’s real behavioral curve, rather than assuming a universal global pattern, build workplaces that perform in both the everyday and the exceptional.

SECTION

The Pressure Points: Where Friction Concentrates

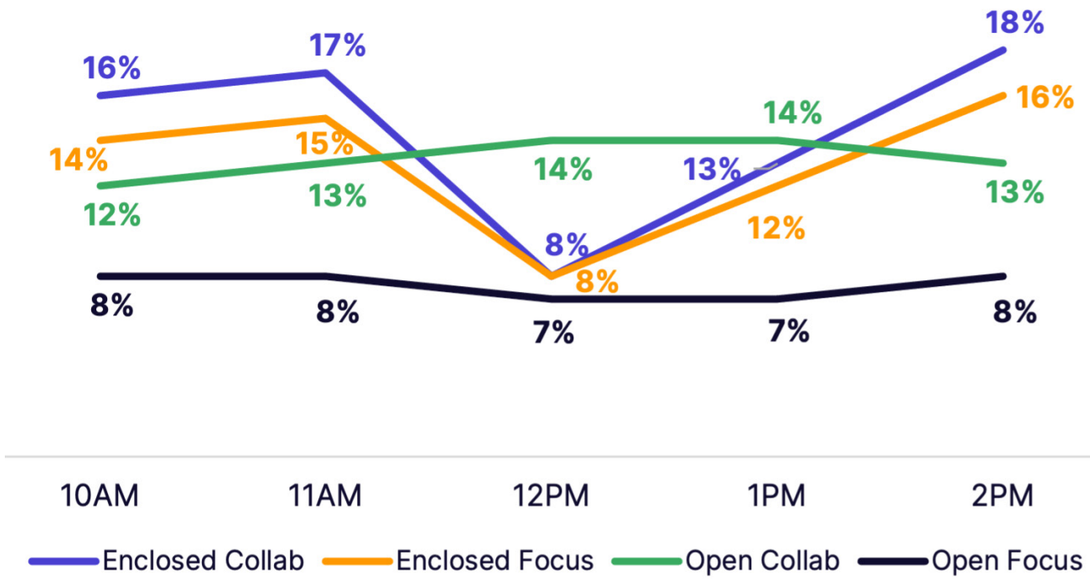
The office rarely fails uniformly; it breaks in specific rooms, specific hours, and recurring patterns that repeat week after week. These pressure points are the true signal beneath the averages: the spaces that carry the system, the ones that fall behind, and the mismatches that drag productivity.

DYNAMIC 4

A Small Fraction of Rooms Create a Disproportionate Share of the Pain

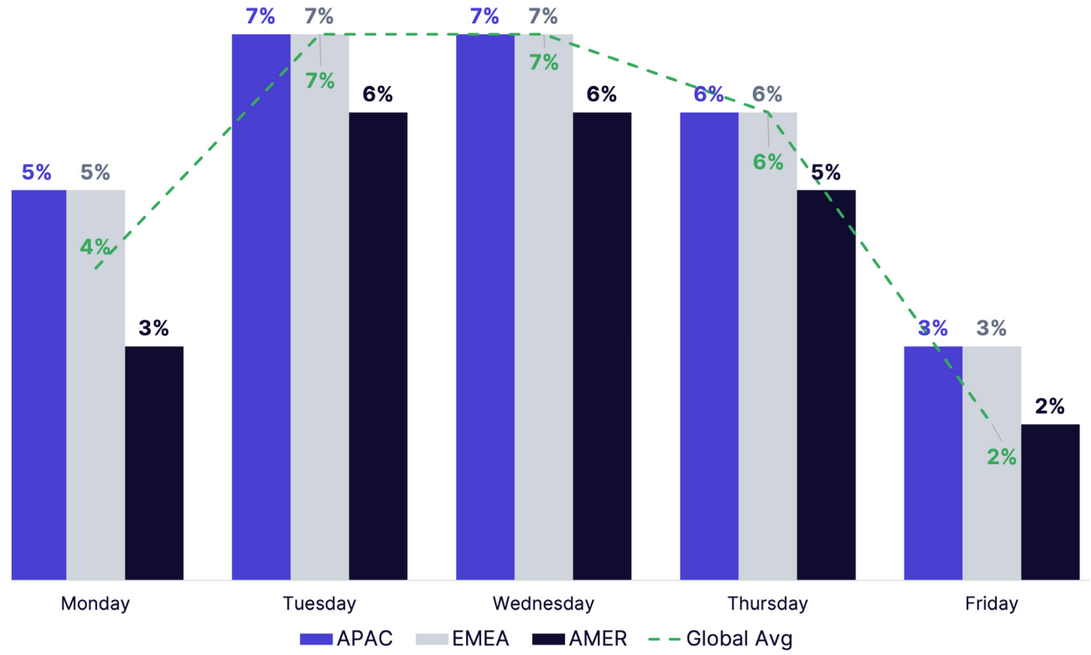
Average Shortage Rates by Normalized Space Type

From 10am - 2pm, January-October 2025



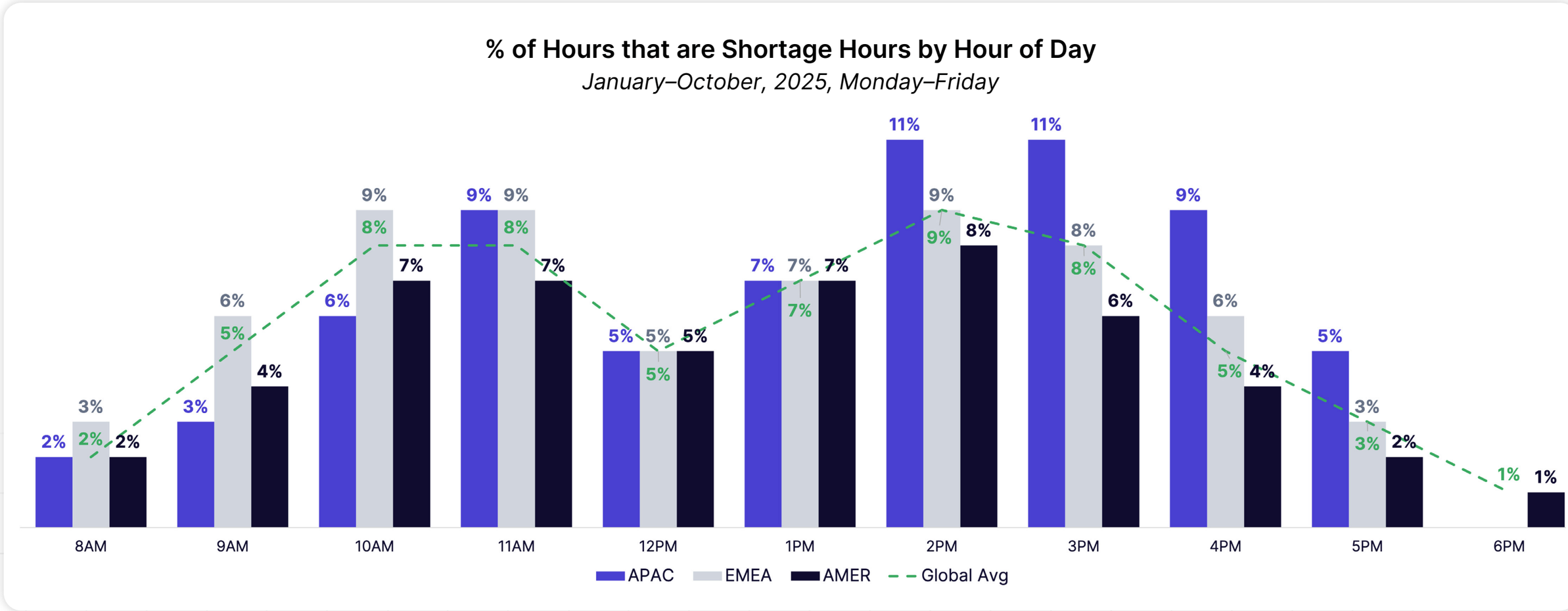
% Hours that are Shortage Hours

Day of Week, January-October 2025



DYNAMIC 4

A Small Fraction of Rooms Create a Disproportionate Share of the Pain



DYNAMIC 4

A Small Fraction of Rooms Create a Disproportionate Share of the Pain

Across the year, shortages follow the same pattern worldwide: a small set of enclosed rooms absorbs a disproportionate share of demand. Enclosed collaboration spaces average an 11% shortage rate, and enclosed focus rooms hold steady at 10–11%, the highest across all space types despite representing less than a quarter of total supply (more on this in the next section.)

By contrast, open areas experience far lighter strain—open collaboration average 9–10% average shortage rate, and open focus just 6–7%.

A small fraction of enclosed rooms hit capacity precisely when employees need them most, forcing overflow into open collaboration zones, phone booths, and focus areas. This friction isn't caused by buildings being full — it's caused by specific rooms failing at specific times.

Surges themselves aren't the issue; misreading them is. Planning around annual averages hides where the system actually breaks, while designing for the absolute peak overcorrects. The organizations that win are the ones that understand where shortages concentrate and build enough flexibility to absorb those peaks without overbuilding.

Shortage Concentration

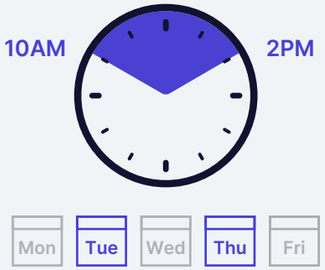
January–October, 2025

TAKEAWAY

The pressure isn't only structural; it's temporal. Across regions, shortages reliably spike during the same window: 10 AM to 2 PM, Tuesday through Thursday, when global shortage rates climb into the 14–18% range.

In APAC, these peaks extend later into the afternoon; in EMEA, they compress sharply into midday; and in AMER, they rise more gently but still follow the same weekly rhythm. No matter the region, the same pattern holds: the right rooms run out at the same hours everywhere.

Global Shortage Window



DYNAMIC 5

The Pressure Points: Where Friction Concentrates

Static Space Plans Are Partly to Blame

	Avg Occupied Capacity Usage	Peak Capacity Usage	Footprint Share*	Avg Shortage Rate
Enclosed Collab	27%	44%	15%	11%
Enclosed Focus	77%	81%	8%	10-11%
Open Collab	18%	34%	8%	9-10%
Open Focus	91%	85%	69%	6-7%

* Footprint share reflects each normalized space type's share of total measured spaces—by space count, not square footage or seats—across 200M+ square feet of corporate real estate.

Hybrid work changed how people meet, and the current mix no longer fits.

Enclosed spaces carry disproportionate demand: enclosed focus rooms average **77% average occupied capacity usage** and **81% peak capacity usage** with only **8.2%** footprint share. Enclosed collaboration shows a similar pattern, with **27% average occupied capacity usage** despite only **15%** of the footprint. The enclosed supply is struggling to keep pace with the demand from how teams work today.

Static mixes create structural imbalance across both enclosed and open spaces.

Open spaces dominate supply, with open focus at **69%** and open collaboration at **8%** of the footprint. Yet their usage patterns diverge: open focus has a high average occupied capacity usage, 91%, because it absorbs overflow from constrained enclosed rooms, while open collaboration sits at just **18% average occupied capacity usage** and **34% peak capacity usage**, showing that much of the open footprint does not match current collaboration behavior.

Rethinking the mix is essential.

Limited enclosed supply pushes shortage rates into the **10–11%** range, while oversized or mismatched open areas remain underused. The problem is not layout. It is the static mix itself. Realigning the distribution of room types can reduce friction and bring the workplace back into balance with actual behavior.

SECTION

Different Rhythms: How Workplace Patterns Vary by Industry

Even when the signals inside one workplace are clear, the rhythms across industries tell a different story. Each sector carries its own cadence shaped by culture, customer expectations, regulatory norms, and the nature of the work itself. Adaptability doesn't happen in a vacuum — it happens in the context of the industry you operate in.

And this year's data is unequivocal: there is no **singular pattern** to plan around. Every industry has its own rhythm and pressure points.

DYNAMIC 6

Different Rhythms: How Workplace Patterns Vary by Industry

Every Industry Has Its Own Rhythm

INDUSTRIES

- Energy, Oil & Gas
- Finance
- Healthcare & Life Sciences
- Industrial & Logistics
- Infrastructure
- Insurance
- Professional Services
- Retail
- Tech & Media

DYNAMIC 6

Different Rhythms: How Workplace Patterns Vary by Industry

Every Industry Has Its Own Rhythm

2025 Global Avg

STATISTICS:

Avg Capacity Usage	10.6%
Peak Capacity Usage	56.6%
Avg Occupied Capacity	44.8%
Active Time Usage	17.3%
Total Time Usage	24.8%
Passive Time Usage	7.5%

Energy, Oil & Gas

ABOUT:
Low average capacity usage paired with steady, moderate peaks creates a predictable rhythm that concentrates demand into clear, repeatable windows.

STATISTICS:

Avg Capacity Usage	9.2%
Peak Capacity Usage	48.1%
Avg Occupied Capacity	46.3%
Active Time Usage	15.2%
Total Time Usage	21.8%
Passive Time Usage	6.6%

Finance

ABOUT:
Higher average capacity usage combined with sharp, recurring midday peaks makes timing—not volume—the key source of pressure on enclosed rooms.

STATISTICS:

Avg Capacity Usage	14.4%
Peak Capacity Usage	65.5%
Avg Occupied Capacity	53.9%
Active Time Usage	23%
Total Time Usage	32.1%
Passive Time Usage	9.5%

Healthcare & Life Sciences

ABOUT:
Low average capacity usage but irregular peak surges create unpredictable demand spikes that strain enclosed spaces despite modest baselines.

STATISTICS:

Avg Capacity Usage	7.8%
Peak Capacity Usage	42.9%
Avg Occupied Capacity	48.1%
Active Time Usage	10.7%
Total Time Usage	16%
Passive Time Usage	5.8%

Industrial & Logistics

ABOUT:
Moderate average capacity usage with reliably high peak capacity produces a structured rhythm where convergence happens in short, high-intensity bursts.

STATISTICS:

Avg Capacity Usage	9.8%
Peak Capacity Usage	57.6%
Avg Occupied Capacity	47%
Active Time Usage	15.6%
Total Time Usage	22.3%
Passive Time Usage	7.3%

DYNAMIC 6

Different Rhythms: How Workplace Patterns Vary by Industry

Every Industry Has Its Own Rhythm

Infrastructure

ABOUT:

Very low average capacity usage and mild peaks reflect brief, task-oriented on-site activity that keeps pressure across space types minimal.

STATISTICS:

Avg Capacity Usage	6.8%
Peak Capacity Usage	33.7%
Avg Occupied Capacity	24.6%
Active Time Usage	20%
Total Time Usage	24.9%
Passive Time Usage	4.4%

Insurance

ABOUT:

Low to moderate average capacity usage paired with stable, low-volatility peaks creates a predictable rhythm where demand rarely stresses core rooms.

STATISTICS:

Avg Capacity Usage	8.9%
Peak Capacity Usage	43.6%
Avg Occupied Capacity	34.7%
Active Time Usage	19.8%
Total Time Usage	24.9%
Passive Time Usage	5.1%

Professional Services

ABOUT:

Moderate average capacity usage but strong midday peaks reflect heavy reliance on scheduled collaboration that consistently stresses enclosed spaces.

STATISTICS:

Avg Capacity Usage	11%
Peak Capacity Usage	61.2%
Avg Occupied Capacity	43.6%
Active Time Usage	18.2%
Total Time Usage	26.1%
Passive Time Usage	7.9%

Retail

ABOUT:

Moderate average capacity usage with higher-intensity peaks reveals short, concentrated coordination windows that push demand into key spaces.

STATISTICS:

Avg Capacity Usage	11.7%
Peak Capacity Usage	53.6%
Avg Occupied Capacity	40.8%
Active Time Usage	22.5%
Total Time Usage	31.3%
Passive Time Usage	8.8%

Tech & Media

ABOUT:

Hybrid behavior is bursty rather than steady: averages look modest, but when teams come in, they drive sharp collaboration peaks that put consistent pressure on core spaces.

STATISTICS:

Avg Capacity Usage	8.9%
Peak Capacity Usage	54.3%
Avg Occupied Capacity	39.8%
Active Time Usage	13.6%
Total Time Usage	20.7%
Passive Time Usage	7.1%

DYNAMIC 6

Different Rhythms: How Workplace Patterns Vary by Industry

Every Industry Has Its Own Rhythm

Across real estate portfolios and workplaces around the world, the workplace landscape, no two industries have the same occupancy and utilization trends. Finance shows steady average capacity usage but pronounced midday peaks in peak capacity usage.

Tech and Media experience larger week-to-week variability in both average capacity usage and average shortage rates.

Healthcare and Life Sciences maintain lower average capacity usage overall, yet exhibit more erratic peak capacity surges.

And sectors like Energy, Retail, Insurance, and Professional Services follow distinct rhythms shaped by client cycles, field work, and regulatory cadence, producing unique patterns in both average capacity usage and average shortage rate intensity.

TAKEAWAY

This is why generic approaches to space planning fall short. A ratio or design standard that serves one sector can fail in another because each industry has its own rhythm of attendance trends, space type preferences, and bottleneck patterns.

The workplaces that best serve their employees aren't the ones that chase the "right" model; they're the ones that understand their rhythm and design for it.

In a year defined by motion, organizations win by reading their industry's unique demand patterns — and engineering spaces that flex to meet them.

CONCLUSION

Planning in Motion

The story of the workplace in 2025 is defined by motion. Across global portfolios, total time usage and average capacity usage remain modest, yet these metrics no longer capture the realities employees experience. The moments that matter most — the midweek, midday windows — reveal a different picture: the spaces people depend on hit their limits first, with enclosed rooms carrying persistent double-digit average shortage rates and open focus areas absorbing overflow as behavior shifts throughout the day.

Taken together, these signals point toward a more adaptive approach to workplace strategy. Instead of relying on fixed ratios or static assumptions, organizations increasingly benefit from planning models that flex with changing behavior — adjusting layouts, processes, and decisions in shorter cycles and with clearer visibility into real demand. The path forward isn't about abandoning past practices; it's about evolving them. In a workplace defined by motion, adaptability becomes an advantage — one built through systems designed to respond at the pace of the people who use them.

WHAT'S NEXT

From Understanding the Present to Predicting the Future

The next leap for workplace teams is moving from understanding the present to predicting what comes next. Decision Intelligence, powered by Meridian—VergeSense's Workplace AI Platform—unifies every workplace signal into a single, adaptive model that shows where spaces will hit their limits, how policy shifts will reshape peaks, and which changes will meaningfully improve experience.

Predictive Planning, the first product in the Decision Intelligence suite, turns that foundation into foresight: it forecasts demand with behavioral accuracy, identifies breakpoints before they occur, and lets leaders model any scenario—growth, lease exits, restacks, attendance changes—in minutes instead of months.

You can't eliminate volatility, but you can anticipate it. You can't impose a universal pattern, but you can understand your own. And with Decision Intelligence, adaptability becomes a capability, not an aspiration.