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H1 2024 Corporate Office: Workforce Insights and Space Optimization



Nura Space
September 2024

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INTRODUCTION

We are excited to share our first periodical report with you, based on over 1.5 million bookings from January 1 to June 30, 2024, a record for Nura Space.

As a new technology platform, we have seen great momentum in the first half of 2024. User numbers are up by 170% year on year, and bookings tell a similar story. This suggests that more people are engaging with our platform and the office spaces our customers are delivering.

Our findings highlight that organisations with a clear workplace purpose are more successful. A well-defined strategy makes it easier to manage change, boost engagement, and strengthen business resilience.

We have identified three key areas for successful hybrid workplaces: Culture, Productivity, and Social Interaction. Each organisation will find its own balance among these—take a moment to identify what works best at your organisation.

We hope this report helps you reflect on your workplace strategies or inspires innovative ideas. At Nura Space, we are here to support you with our technology solutions and expertise.

We would love to chat about your workplace needs, so do not hesitate to get in touch with us.

ANTON SCHIAVELLO

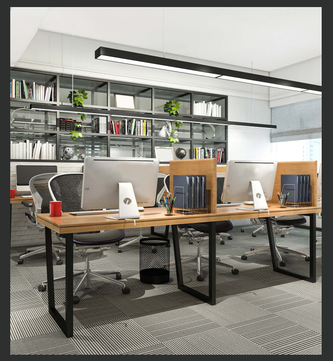


As has been the case in recent years, the role of the workplace continues to change and evolve and, as a workplace platform, we understand how critical it is for us to be at the forefront of this constant evolution. At Nura Space, we are always considering how our workplace platform can continue to be relevant and provide optimal value to people and business. We are continuously engaging with our clients, digesting their requirements and converting these into high-value, well-considered product solutions that will support all our users in the ways of working now and in the future.

For us to be able to do this effectively, it is critical that we also take the opportunity to review the wealth of information that we have at our fingerprints - data. We understand that making data-driven decisions about how we can best support our clients is key.

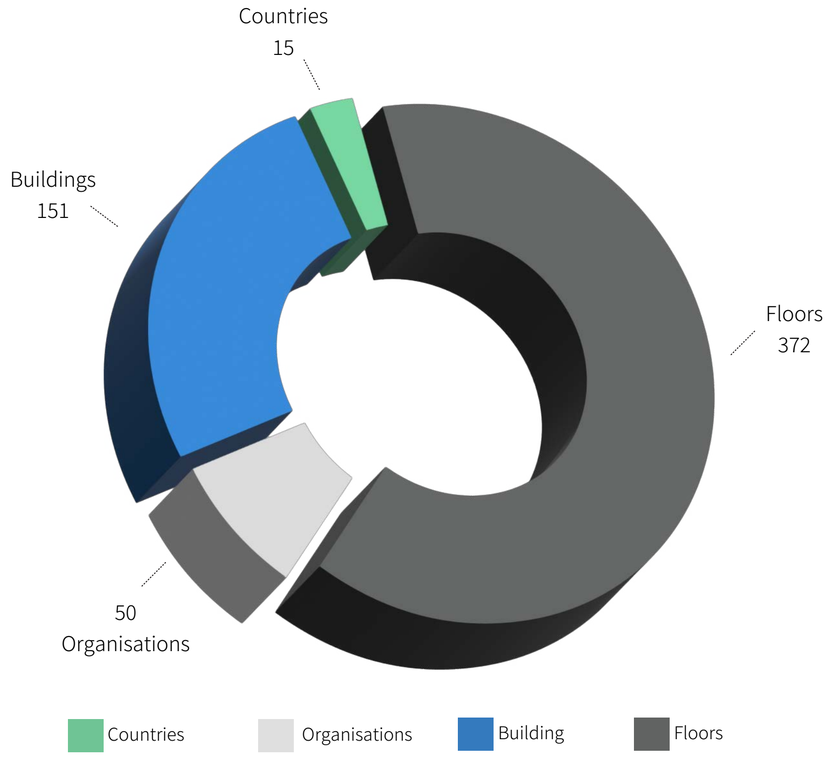
WORKPLACE INSIGHT

The following report is an analysis of data from the Nura Space platform, comparing the periods of H1 2023 and H1 2024. Through this report, Nura Space aims to provide insights related to employees' workplace behaviour and how we, Nura Space, identify correlation and inferences in the data, to better understand what micro and macro trends are prevalent.

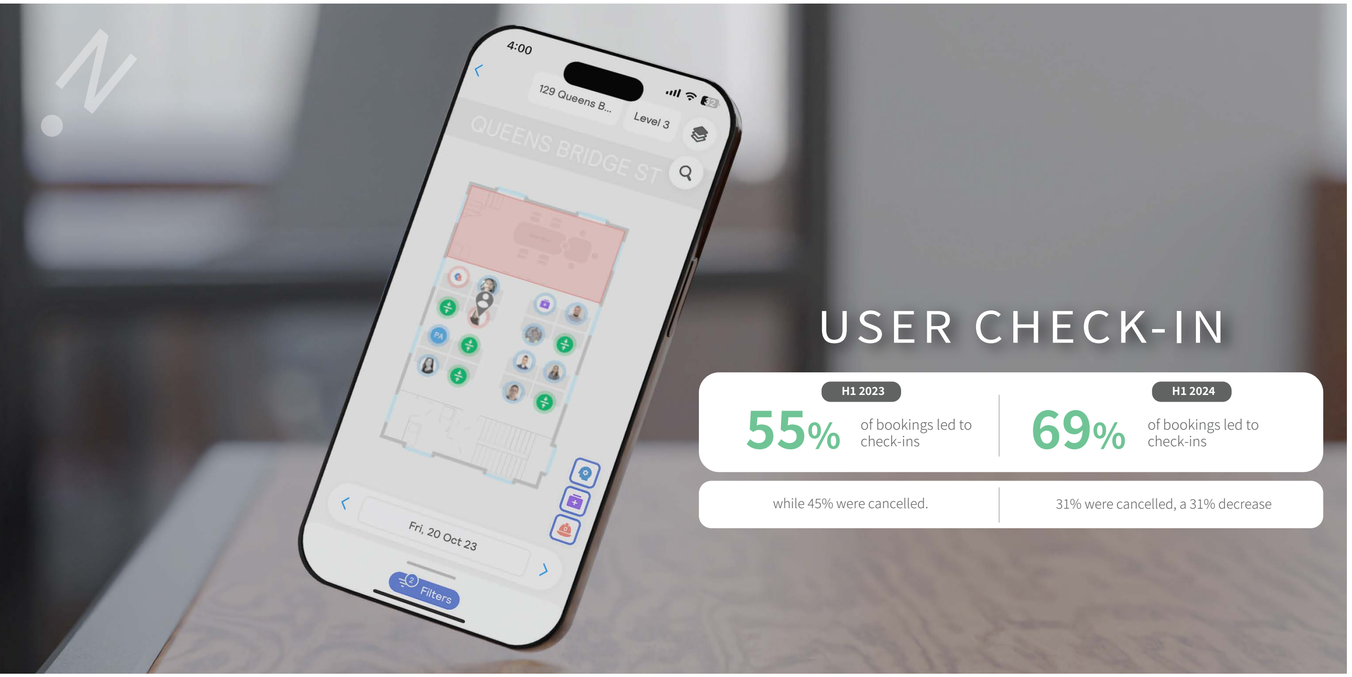


WORKPLACE BOOKING DATA

This report comprises of workplace booking data from 50 organisations, spanning across 15 countries globally, with 81% of offices located within Australia.



NURA • SPACE LOCATIONS		
Australia	United States	Ireland
UAE	China	Luxembourg
Singapore	Hong Kong	Philippines
Indonesia	India	UK
New Zealand	Switzerland	Sri Lanka



Average Booking and Check-In per Week

In H1 2024, the average number of bookings per user per week has **increased to 1.33, which is 14% higher than the 1.17 bookings per user per week recorded H1 2023.** Similarly, the average number of check-ins per user per week has risen to 0.86 in H1 2024, marking a 4% increase from the 0.51 check-ins per user per week seen in H1 2023.

What this increase means for companies

- an increase in user engagement with the platform
- increased office attendance
- recorded increase in work-point utilisation indicated by user check-ins
- an increase in planned office attendance indicated by booking and check-in behaviours

Preferred booking device

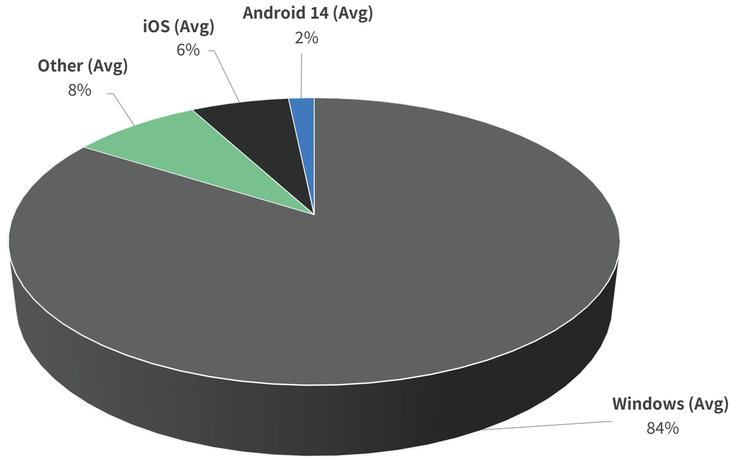
Nura Space users engage with the platform through Microsoft Teams, web interfaces, and API-powered integrations, such as in-house applications.

15%

Notably, **only 15% of daily traffic originates from Android or iOS** devices, underscoring the significant reliance on the **Nura Space Microsoft Teams app.**



This insight aligns with the modern work environment, where the laptop serves as the central hub, seamlessly transitioning between the office, home, business lounge, and café. By delivering tools through the most effective channels, we ensure a frictionless experience, a key focus in our discussions with customers.



Integrating Technology with People and Place Strategies



Supporting Strategy

Workplace technology serves as a crucial support strategy and is usually implemented with careful consideration of broader 'people and place' strategies. These strategies align the organisation's cultural vision ('People') with its corporate real estate objectives ('Place').

Our data highlights the importance of ensuring that workplace technology complements these overarching strategies by enhancing user experiences and services.



80%

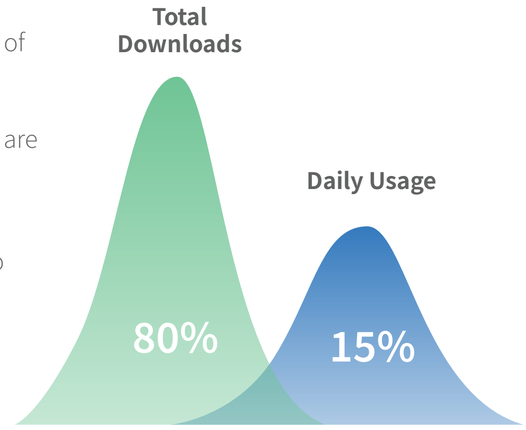
App store downloads

of Nura Space users have downloaded the mobile app from the Apple or Google Play stores.

Total Downloads vs Daily Usage

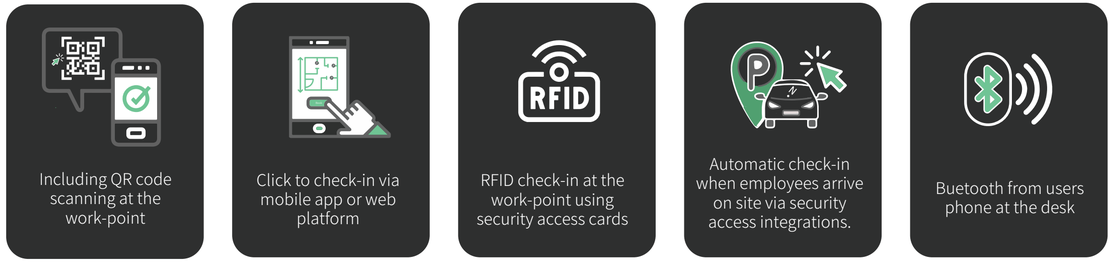
This is noteworthy because, when compared to the daily use of mobile apps, which stands at 15%, it suggests that users are engaging with both the mobile app and Microsoft Teams but are primarily choosing Microsoft Teams for their needs.

This trend underscores the need for workplace technology to seamlessly integrate with preferred tools to maximize user satisfaction and efficiency.

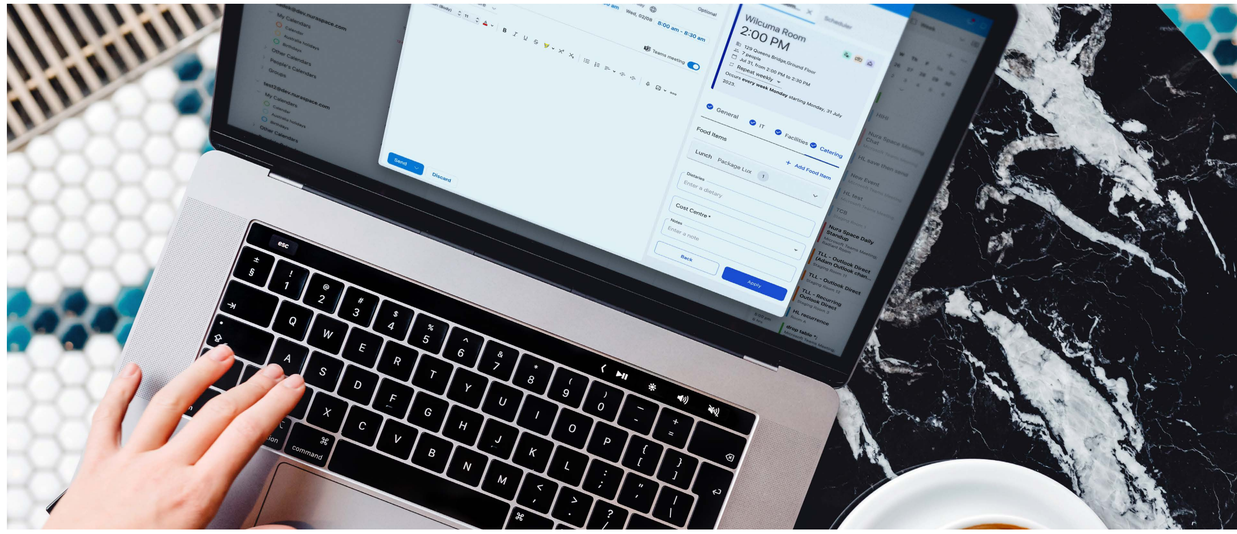


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Variety of options for checking in



We aim to provide easy check-in options and reduce friction. Checking in helps organisations see how desks are used and enables unused desks to be automatically auto-cancelled. This helps make sure workspaces are used efficiently and that users get a desk for their day.



BUSIEST DAYS OF THE WEEK

Unsurprisingly, the lowest number of bookings were recorded on Mondays and Fridays, with an even spread recorded for Tuesday, Wednesday and Thursday.

Mondays and Fridays: 18-19% of a weeks bookings in 2023 and 15-19% in 2024.

Tuesdays, Wednesdays and Thursdays: 21-22% both years.

Due to the increased peak across the three middle days of the week, we see an increase in bookings as employees seek to secure a suitable work point on their preferred days.



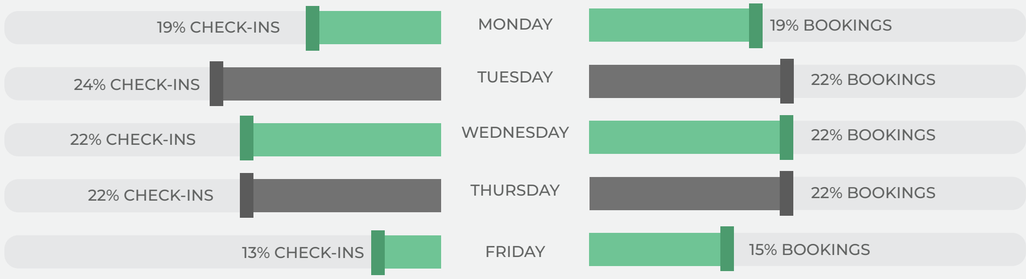
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WEEKDAY RATIO

H1 2023 ALL BOOKINGS & CHECK-INS



H1 2024 ALL BOOKINGS & CHECK-INS



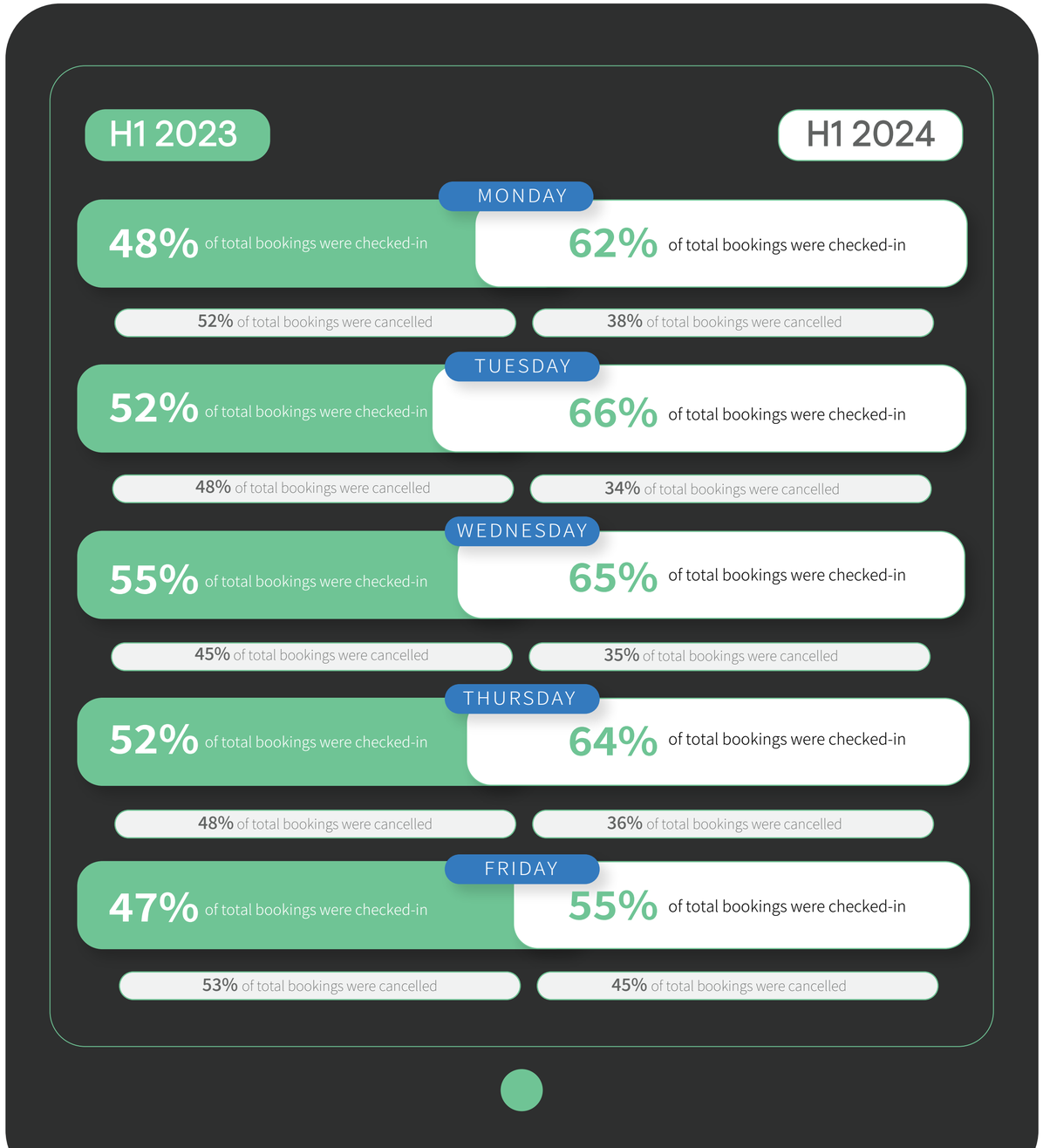
This type of workplace behaviour not only leaves workplaces potentially under-utilised for 2 days of the week, but it also sees an increased pressure placed on workplace capacity for Tuesday through to Thursday each week. To overcome this, organisations are increasingly 'opting in' for notifications functionality to alert users of their upcoming bookings and reminders to prompt users to check-in to their booking if they are yet to do so, or cancel the night before.

Just as Tuesday, Wednesday and Thursday recorded the highest number of bookings, these days also, as expected, reported the highest attendance with 70% of the week's check-ins occurring over these 3 days in H1 2024.

70% **of attendance occurs on Tuesday, Wednesday, and Thursday**

For H1 2023, 60% of the week's check-ins occurring over these 3 days, again confirming the consolidation of user attendance into the first 4 days of the week. Nura Space's check-in data is significant as it goes a step beyond an employees intention to attend the workplace by booking and captures the number of users that did in fact attend the workplace and by checking in. The use of notifications reminds employees to check-in to their booking and if not completed, the automatic cancellation functionality cancels bookings at a company's predefined time interval, after the booking start time. The use of these two key policies allows organisations to effectively manage their workplace capacity on these days where workplace attendance is at a higher volume.

Although Mondays and Fridays had fewer bookings on average, people's booking habits were similar to those on the busier days. In the first half of 2024, over 60% of bookings on these busy days were checked-in, completed, or auto-completed.



Bookings and check-ins are on the rise in 2024

To help combat the under-utilisation experienced on a Friday - and, to a lesser extent, Monday - we are starting to see many of our clients adopting a weekly roster or ‘team days' approach to workplace attendance. Undoubtedly, this type of approach also aims to relieve workplace capacity pressures during the middle of the week, by spreading users attendance more evenly across all five days. The Nura Space Team Space Management (TSM) tool assists organisations with implementing this structured hybrid working model, by managing a user’s ability to book a work-point based on their designated office days. Not only does this approach assist with managing capacity, it also benefits end users by ensuring that their allocated office days will be shared with the peers that they need to collaborate with.

Nura Space continues to learn and evolve our features with a commitment to improving the overall experience for our clients, at both the organisation and employee level. By conducting these types of analyses, we hope to continue to inform both ourselves and our broader community about how workplaces are being used today and what can be done to better support the ways of working moving forward.

AVERAGE NUMBER OF DAYS A USER ATTENDED THE OFFICE PER MONTH

2024
AVERAGE NUMBER OF DAYS
5.26 days

4.78 days
2023
AVERAGE NUMBER OF DAYS

The average number of days a user spends in the office increased by 10% from 2023 to 2024. While the overall numbers are still relatively low, this increase is still significant.



BOOKINGS MADE ON THE DAY VS BEFOREHAND

2024

Lead Time Breakdown

Less than 1 Day: 22%

1 Day: 11%
2 Days: 6%
3 Days: 5%
4 Days: 4%
5 Days: 3%
6 Days: 3%
7 Days: 6%

Greater than 1 Week: 40%

2023

Lead Time Breakdown

Less than 1 Day: 30%

1 Day: 12%
2 Days: 5%
3 Days: 5%
4 Days: 4%
5 Days: 3%
6 Days: 3%
7 Days: 4%

Greater than > 1 Week: 34%

Fewer Last-Minute Bookings

The share of bookings made on the same day or just before the start decrease from 30% in 2023 to 22% in 2024. This is interesting as it suggests users are increasing their self organisation, with fewer last minute bookings mean better planning and resource management. It helps with smoother scheduling, reduces the chance of overbooking, and makes the workplace more organized.

More Advanced Bookings

More people are booking further in advance. The percentage of bookings made more than a week ahead went up from 34% in 2023 to 40% in 2024. This may result with better planning and coordination.

Stable Short-Term Bookings

In H1 2024, 17% of bookings were made 1-2 days in advance, which is consistent with the percentage in 2023. This means that while there are more of these short-term bookings, they still make up the same percentage of total bookings.

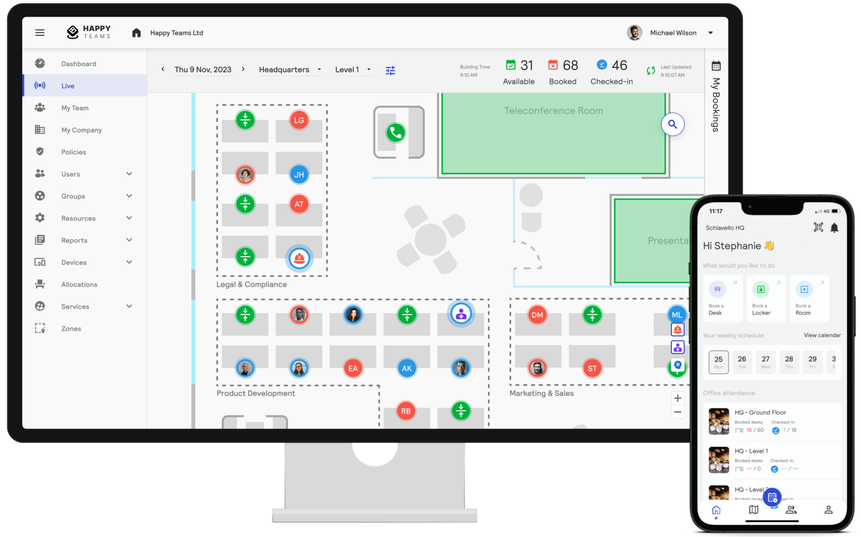
CONCLUSION

Our H1 2024 report has uncovered some fascinating trends in workplace behaviour. Workplace utilisation is on the rise, with a notable 10% increase in monthly user check-ins. What stands out is the shift in attendance patterns, with employees consolidating their in-office days from Monday to Thursday. Could this be the start of a long-term trend, or will we see a shift in the future?

On top of this, we've observed a shift in booking habits, with a 8% decrease in same-day bookings. While this could be influenced by changing workplace strategies or policies, it clearly shows that users are planning ahead more than ever.

As Nura Space continues to learn and evolve, the commitment to improving the overall value to our customers remains the number one priority. We aim to continue informing both our customers, communities and ourselves on the workplace trends we're seeing in an effort to better support ways of working now and into the future.

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info@nuraspace.com +61 3 4830 5114