Spotlight
What Workers Want
The property implications

October 2014
Quality workplace and happy workforce
The good news is that 20% of the surveyed people like their workplace and would not change anything. This happy workforce is diverse and evenly divided through the different age groups, job positions, industries and size of companies suggesting that none of this criteria has a direct impact on their level of satisfaction.

30% would like to change their office location. In fact three-quarters of the surveyed respondents declared that workplace location would influence their decision to take a new job subject to the same carrier prospects and financial package. This shows the close link between an employee and its workplace and highlights the importance of staff concerns in real estate decisions.

Location is paramount!
Even in this age of globalization and virtualization, the geographic area where you choose to set up or relocate your company should be a priority. Not only does location convey company branding and enhances networking it is also key to attract and retain the adequate workforce to your business. According to the surveyed employees the ideal workplace is very much tied up to their working life including predominantly commuting time and means. 80% of the respondents consider the time they spend in commuting as very important. The average commuting time in Ile de France (IDF) is 42 minutes (84 min/day), which represents about 20% of a day’s work. Consequently, 68% of the survey staff gave the highest importance to the proximity to public transport.

Surprisingly the commuting time is similar whether the office is located in Paris or in the suburban area. However, the means of transport used differ depending on the office location. 70% of the survey employees working in Paris is using the tube, the tram or the train against 30% in the suburban areas. Indeed, people working outside the city centre tend to use their car (43%) more than the Parisian staff (13%). This can be explained by the less dense public transport network in suburban areas as well as the political measures taken by local authorities to reduce the traffic within the centre of the capital. Traffic congestion within Paris is such that the RATP recorded a decline of 6% of the average speed of the Parisian bus although having right of way. This explains the low percentage (5%) of TMT employees are generally younger and far less demanding regarding their workplace than all other sectors.

SUMMARY

The ideal workplace is conventional

■ Recessionary pressures brought about significant impetus for workplace strategy in the corporate agenda and staff preferences are increasingly weighting in their final decision.
■ Understanding these preferences provides insight into what occupiers want from their office space and how landlords/developers can fulfil these.
■ This led Savills research to expand the What Workers Want report to France after two successful issues in the UK.
■ In collaboration with L’ObSoCo we investigated what employees rate as important in their workplace with 503 office employees from the Paris region surveyed by Opinéa.
■ Commuting represents about 20% of a day work on average, which explains the preeminence of workplace location.
■ Relocation should be considered depending on your existing location.
■ Overall basic comfort features should be given the priority for your refurbishment works.
■ Alternative Workplace Strategies (AWS) has not picked up in Paris. The traditional office workplace remains largely the most preferred equally by employees and employers accounting for 49% and 47% of the surveyed people respectively.

“Location is preeminent in employees’s view and should be further reinforced in the future in spite of work flexibility and work mobility”
Lydia Brissy, Savills European Research

Graph source: Savills, ObSoCo, Opinéa
surveyed people using buses. Walking or cycling to the office is limited to 7% of the sample and exactly the same in Paris and suburban areas. This explains the relatively low importance attributed to facilities such as showers, changing rooms and bicycle storage.

Relocating or refurbishing?
An office relocation is often sensed by employees as a stressful experience due to new habits it will generate. For the employer it can either be a way to attract and retain talent as it can mean losing some existing ones. Thus when it comes to chose between renewing your lease or relocating staff concerns should be carefully considered.

Based on our survey nearly 60% of respondents reported no productivity gains following their previous office move. The remaining employees that noticed productivity changes is divided evenly between improvement and reduction of productivity with the commuting time being one of the main factor impacting productivity according to them. Thus, if your current office location is not great there might be advantages in moving to a better location. On the contrary, if your current office location is great it could be risky. The survey results also suggest that some potential gains can be achieved in targeting a new or modern office building if you consider moving. 61% of respondents believe the architecture of their office would have a positive impact on their productivity. Most preferred building architecture type is “New and Modern”, accounting for 50% of all respondents (18% prefer Haussmanian buildings). Depending on your current location, renewing your lease might be the best choice. In that case refurbishing your office is an option to consider as one-fourth of the respondents reported an overall productivity improvement following their previous office refurbishment. An interesting finding is that employers do not need to consider complex and expensive refurbishment works as their staff productivity seems to be mainly related to their workstation. Considerations toward improved ergonomic workstations and more comfortable chairs should be given and easily achievable.

"Comfort-ability" to the fore
Excluding all location-based parameters, overall basic comfort features prevail. The noise is given the priority, light is ranked as third most important criteria, smell and temperature both coming to fourth position and comfort is following. However young people are generally given a higher priority than the average to playful features including notably the quality of WiFi, gym and game room. Security is the second most important criteria. 57% of the surveyed staff grant the highest importance to safety and this percentage can climb up to 66% for respondents working in the Seine-et-Marne and 67% for those working in the Yvelines.

Onsite facilities and services are generally regarded as less important by the staff and often easy to identify. The number of car parking spaces to supply is linked to the quality and the proximity of the public transport network. The need for a cafeteria and a kitchen is linked to the quantity and quality of restaurant in the surrounding area etc.

Finally building architecture and office fitouts are perceived as relatively minor elements, irrespective of age, job position or business sector of the employee. Yet in an ideal world half of the respondents would like to work in a new or modern office building and 56% would prefer to work in a funky fit out environment.

Alternative workplace still in its infancy
Alternative Workplace Strategy (AWS) such as hot-desking notably has become increasingly popular especially in the downturn of the crisis. It has been often implemented in the hope to reduce office space and therefore office costs.

Graph 2: Productivity impact of office moves & refurbishment

Graph 3: The ideal workplace - the top 10*
Yet alternative workplace remains rare in Ile-de-France, only 14% of the surveyed population is working in an alternative workplace. It concerns mainly large companies located predominantly in Paris and in the Haut-de-Seine where office rents are generally higher. Some industries seem more inclined to adopt alternative workplace strategies notably the TMT sector accounting for 26% of the answers.

Thus the current office workplace remains largely the most preferred equally by employees and employers accounting for 49% and 47% of the surveyed people respectively. Generally, of all workplaces suggested in the survey, employees tend to prefer the “in the office” options. Apart from the traditional desktop they encourage work in communal spaces (break-out area, cafeteria…), which allows communication and collaboration to be improved. The higher the managerial responsibility of the respondent is, the more he is encouraged to use the communal areas of the office. Only 10% of corporates are willing to adopt a hot-desking strategy, most of which are energy & industry companies or public bodies highlighting the close link between this strategy and the need for cost cutting. Employees, for their part, would rather work remotely, notably from home (38%). This trend is mainly driven by the time they spent in commuting.

As to the impact of alternative workplaces on productivity, answers show mixed sentiment regardless of age, business sector or job position. These results combined with the diverging expectations between employers and employees towards alternative workplaces flags the importance for a company to opt for the relevant strategy.

Green credentials

Nowadays most workers have a clear idea of what is a green building, especially amongst the young generation. The definition of a green building is based on rules and policies for one in two surveyed people whereas it is based on labels and certifications for 27% of the sample. More significant focus on certifications is given by business managers reflecting their concern towards company profile.

If the environmental footprint of an office building is not perceived as a factor of productivity it is however ranked as important and very important by 40% and 27% of respondents respectively.

TMT implies youth, leisure and technology

Over the course of the past three years the TMT (Technology, Media and Telecoms) sector accounted for 15% of the annual take-up (exceeding 1,000 sq m). It represents approximately 17% of the total employment in Ile-de-France and it is expected to grow on average by 1.2% annually over the next five years, against 0.4% for total employment across sectors. Some TMT companies are famous for their original and sophisticated workplace concept and design but is that what the TMT workers want?

Paradoxically, overall respondents from the TMT sectors are far less demanding regarding their workplace than all other sectors. They generally give less importance to nearly all features and facility provisions ranked in the survey. However they have less conventional requirements; the “basics” are not impervious to the architecture of their workplace. It concerns mainly large companies, facilities (such as gym, game room) than workplace or their office design. In turn, they give a higher priority to the quality of WIFI and to leisure-related facilities (such as gym, game room) than respondents from other sectors. This can be explained by the young workforce of the sector. Indeed, 38% of respondents from the TMT sector are below 35 years old against 22% on average in all other sectors.

In view of our survey results the TMT workforce also seems to be slightly
What workers want, What workers need and Easy wins

![Graph showing levels of satisfaction and productivity](image)

Graph source: Savills, ObSoCo, Opinéa / * according to the surveyed employees

**OUTLOOK**

What "Gen Y" Workers Want?

- How can employers future proof workplaces to attract young talents of tomorrow? In 2020 generation Y (19-33 year) will account for 40% of the working population in Ile-de-France.

- Being digital natives "Gen Y" are used to Bring-Your-Own-Device (BYOD) practice at work. They have mobile broadband access and rely on it. Subsequently they are less concerned by the quality of WiFi at their workplace than older generations.

- Expanding mobile and digital technologies brought about the progressive dematerialisation of the working days. This is evidenced in our survey by the importance given to leisure-related facilities at their workplace.

- They are generally less conventional than their older colleagues and are slightly less concerned about their desktop which explains the higher proportion of younger respondents willing to work on hot-desk or willing to share desks.

- The "Gen Y" generation is more open regarding alternative workspace. 41% believe the AWS adopted by their company had a positive/very positive impact on their productivity. 36% believe it had no impact.

- Our survey also indicates that they will give even more importance to their workplace location than the older generations. 38% would primarilly like to change their office location, against only 27% for the respondents older than 35 years old.

- Given that 38% of the "Gen Y" respondents would like to work from home the main challenge for corporates will be to attract their employees to a common workplace that should be revamped in order to:
  - Bring leisure and home to the office to compensate for the time employees spend working during non-working hours.
  - Optimise the time they spend together by redesigning the traditional office in an exchange place to enhance creativity and innovation. 
Paris vs London

London employees seem to be more satisfied about their workplace than Parisian.

- 30% of London respondents would not change anything against 20% in Paris.
- In each side of the Channel workplace location is equally high on the employees’ radar. Public transport connections and length of commute to work are the top concerns of the surveyed employees in both capitals. Additionally, 74% of London respondents would take a new job for a better located workplace (same package) against 76% in Paris.

- Comfort has no border. Excluding all location-based feature basic comfort such as temperature, lighting, comfort of work area, general noise levels and space prevail. Security is also on top of the list.

- For Londoners a “green workplace” is predominantly (81%) associated to green policies in place (i.e. recycling, lights off etc.). Answers from Parisian are more diluted between green policies (52%) and green labels (i.e. HQE, BREEAM etc.) (27%).

- Parisian respondents are more cautious than Londoners regarding potential productivity gains following their last office move (19% vs 32% respectively).

- London companies seems to be more advanced in terms of AWS. Indeed 27% of respondents from London is working in an alternative workplace against 14% in Paris. However only 18% of Londoners believe it has a positive impact on their productivity compared to 32% in the French capital.

- Both French and English employees would choose first to work in a traditional workspace (47%) or would like to work from home as a second choice (Parisian 38%, Londoners 40%). Yet employers views differ. London employers encourage their employees to work from home more than French employers (24% vs 13%) which can be linked to the difference in management between the two countries. French employers on their side encourage their employees to work more from communal space at workplace (e.g. dining area, break-out area etc) than their English counterparts (21% vs 9%).

- Lots of similarities between the Parisian and London Y generation as mobile and digital technologies have wrecked all borders between countries. Does that mean that future workspace will be the same all around the globe?