

# HOW WE WORK

WHAT WE NEED TO KNOW ABOUT THE WORKPLACE  
&  
WHAT'S NEXT?



# EXECUTIVE SUMMARY

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In the last years, we started to hear more and more about the workplace and how we want to work. For employers, developers and owners those are some of the essential standards when they choose a new project for their office space or when they start the development of a new office project.

When talking about the workplace, we analyse all the facts linked to the office space, the amenities located in the building or in the proximity, the public transportation and all the significant details that have an impact to the lives of the employees.

Why is so important to have the latest trends regarding the workplace?

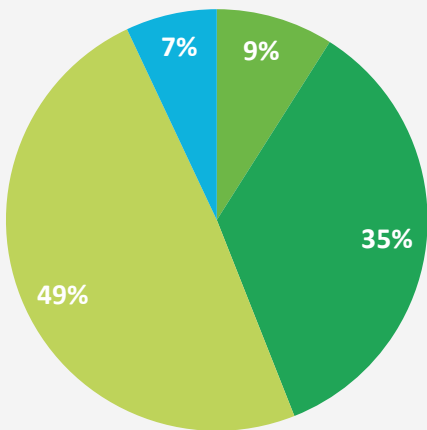
*- attract and retain employees and tenants -*

This special report by CBRE Research summaries a variety of criteria for different generations from different activity domains. We analysed their current situation and what are the most critical needs for them regarding their current office space.

CBRE Romania has surveyed the structure of the office workplace in Romania and its perception by the office workers. The survey took place the first three months of 2018 and was carried out among almost 500 office employees working in Bucharest. The respondents were asked about their opinions regarding their current office space.



# WE HAVE SPLIT THE ANSWERS IN FOUR CATEGORIES:



- Generation Z - 18-24 years old
- Generation Y - 25-34 years old
- Generation X - 35-49 years old
- Generation baby boomers - 50-64 years old

By 2020, Gen Y will make up half of the global workforce. People are also living and choosing to work for longer.



## Where they are working, by sub-market location

CBD	11%
North	22%
Pipera	14%
Central	20%
West	26%
East	5%
South	3%

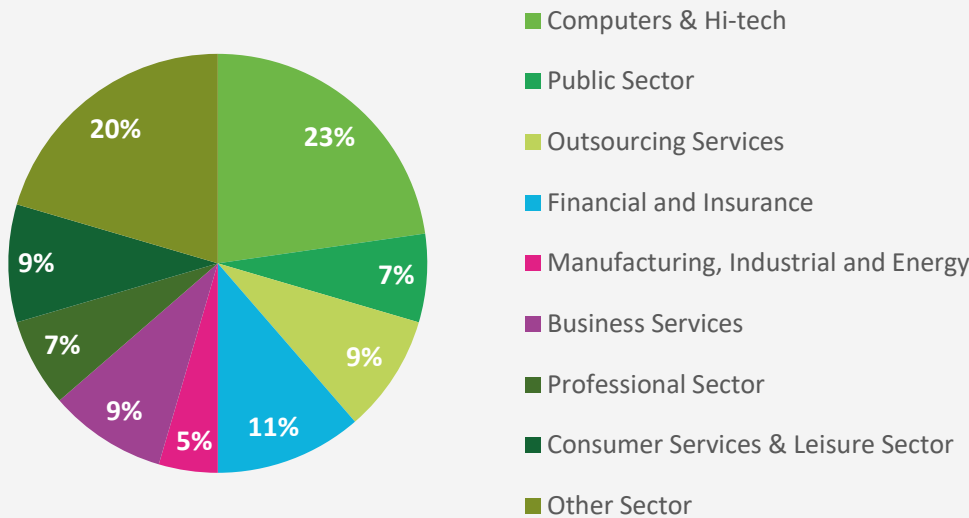




## Where they are working, by domain of activity

43% of the responses are coming from the Computers & Hi-tech and Outsourcing Services sectors.

Romania has all the instruments to attract new entry companies, especially Computers & Hi-Tech and Outsourcing Services and has the most competitive ratio for the IT&C specialists per capita in CEE.



Everyone is talking about millennials (generation Y) and their needs, but the current workforce is based on 4 generations, from baby boomers to generation Z. Within this report, we analysed for each generation the main requirements regarding their workplace.

## Is life after work an important decision factor in choosing a job/location?

	Generation Z	Generation Y	Generation X	Generation baby boomers
Yes	68%	47%	51%	35%
No	32%	53%	48%	65%

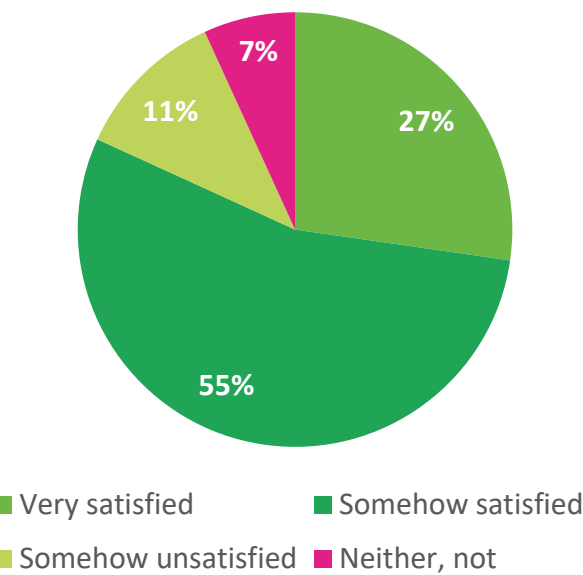
# GENERATION Z

(POST MILLENNIALS 2000-2020)

Social and speed, Multi-taskers, Entrepreneurs,  
Educated, Digital Natives, Less Focused



# How satisfied are you with the current location of your office building?



## Satisfied? Why?

Accessibility - by public transportation  
Accessibility – by car  
Amenities in the area, restaurants, pharmacies, food stores, ATMs

## Where they are working, by sub-market location

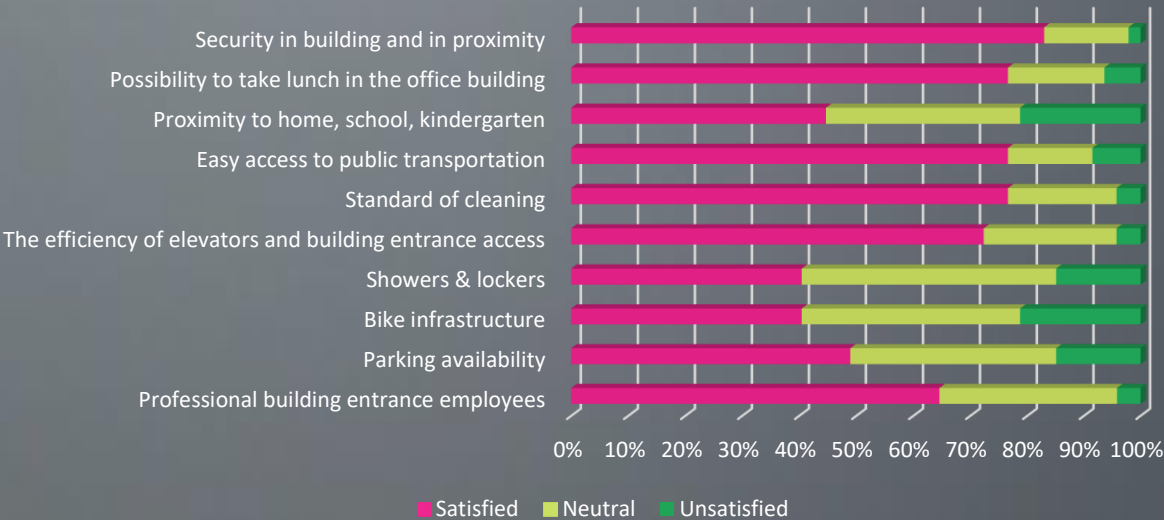
West	36%
North	23%
CBD	14%
Pipera	14%
Central	9%
South & East	4%

## Commuting time

30-60 Min	55%
15-30 Min	25%
10-15 Min	11%



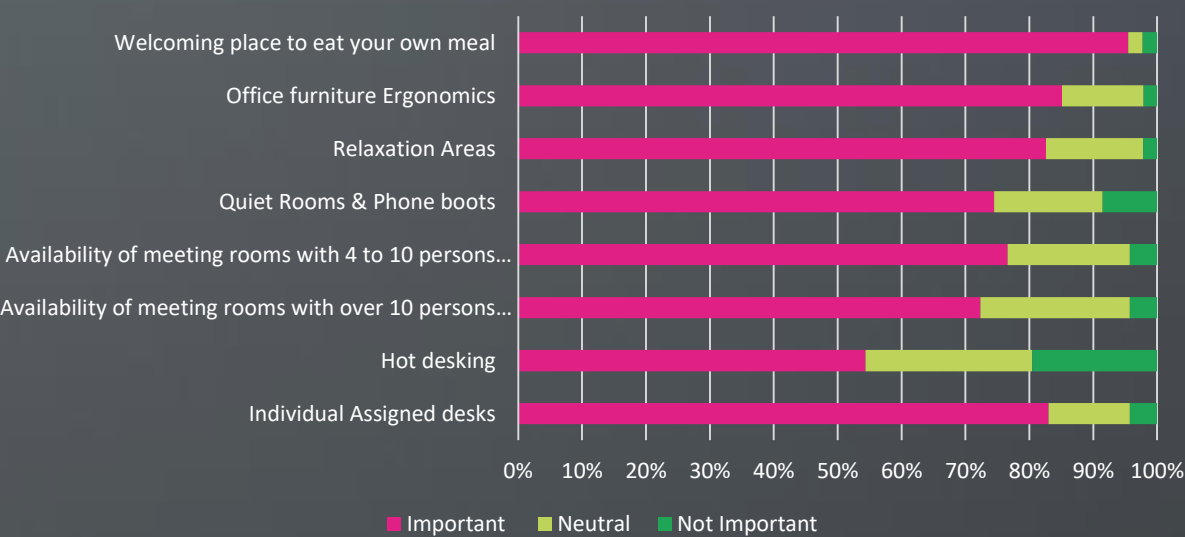
# How they feel in the current office building?



# What type of working space they prefer?

Open Space	32%
Divided individually	43%
Divided by department	26%

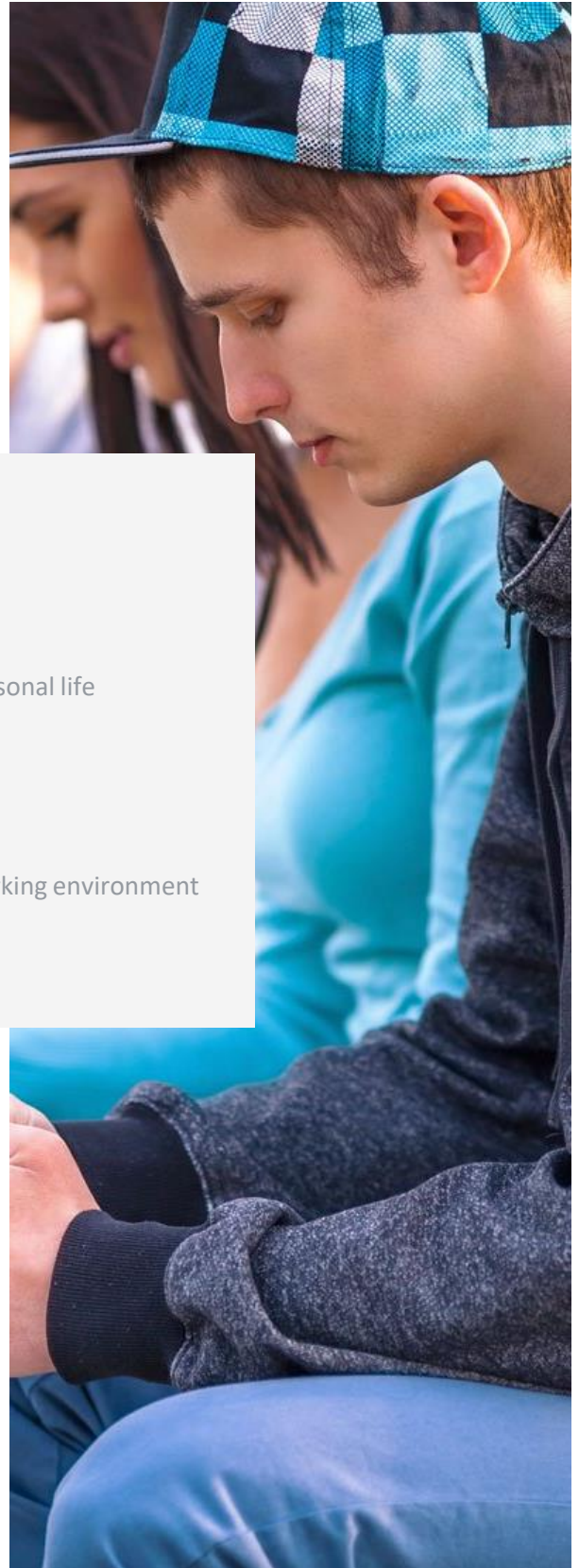
# How important are for generation Z the following aspects regarding the office space?





## Which are the most important complaints of generation Z regarding their actual organization?

1. Not having a balance between work and personal life
2. Acoustic & noise level in the office area
3. Absence of showers & lockers
4. Not enough parking lots
5. Insufficient work space for me, crowded working environment





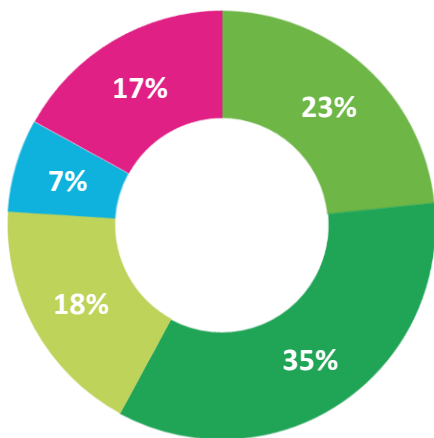
# GENERATION Y

(MILLENNIALS 1980 -2000)

Tech-savvy, optimistic, independent, determined,  
service-oriented, collaborative, innovative thinkers



# How satisfied are you with the current location of your office building?



- Very satisfied
- Somewhat satisfied
- Somewhat unsatisfied
- Very unsatisfied
- Neither, nor

## Satisfied? Why?

Accessibility - by public transportation  
Accessibility – by car  
Amenities in the area, restaurants, pharmacies, food stores, ATMs

## Where they are working, by sub-market location

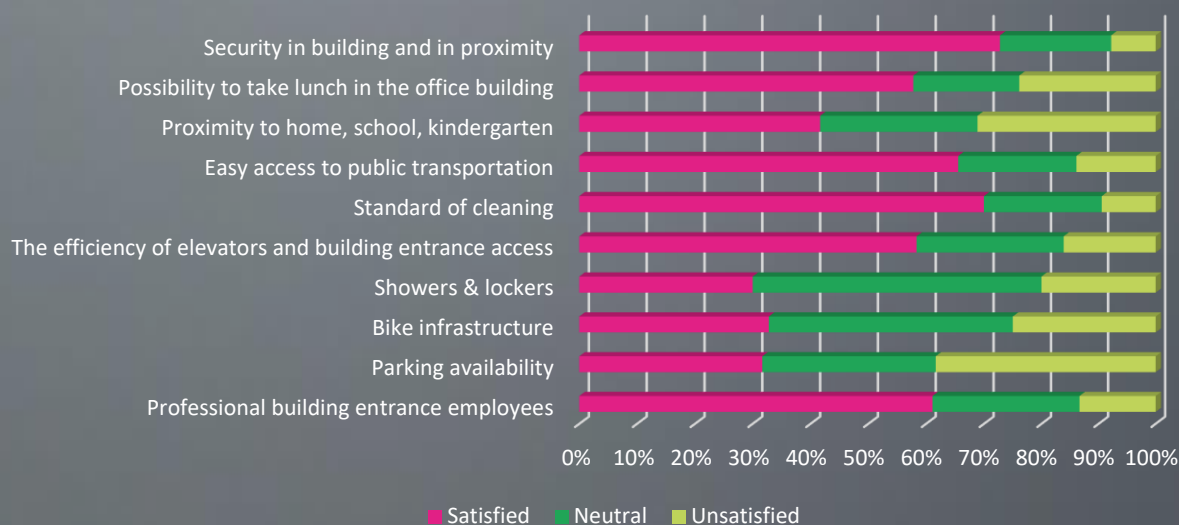
West	26%
North	24%
CBD	11%
Pipera	20%
Central	15%
South & East	6%

## Commuting time

30-60 Min	57%
15-30 Min	21%
10-15 Min	9%



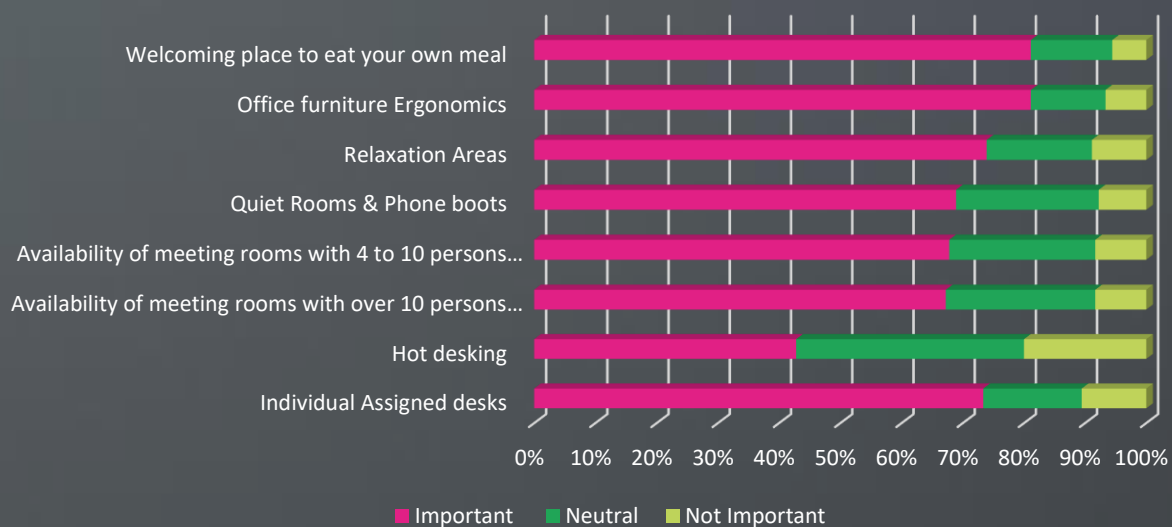
## How they feel in the current office building?



## What type of working space they prefer?

Open Space	32%
Divided individually	51%
Divided by department	18%

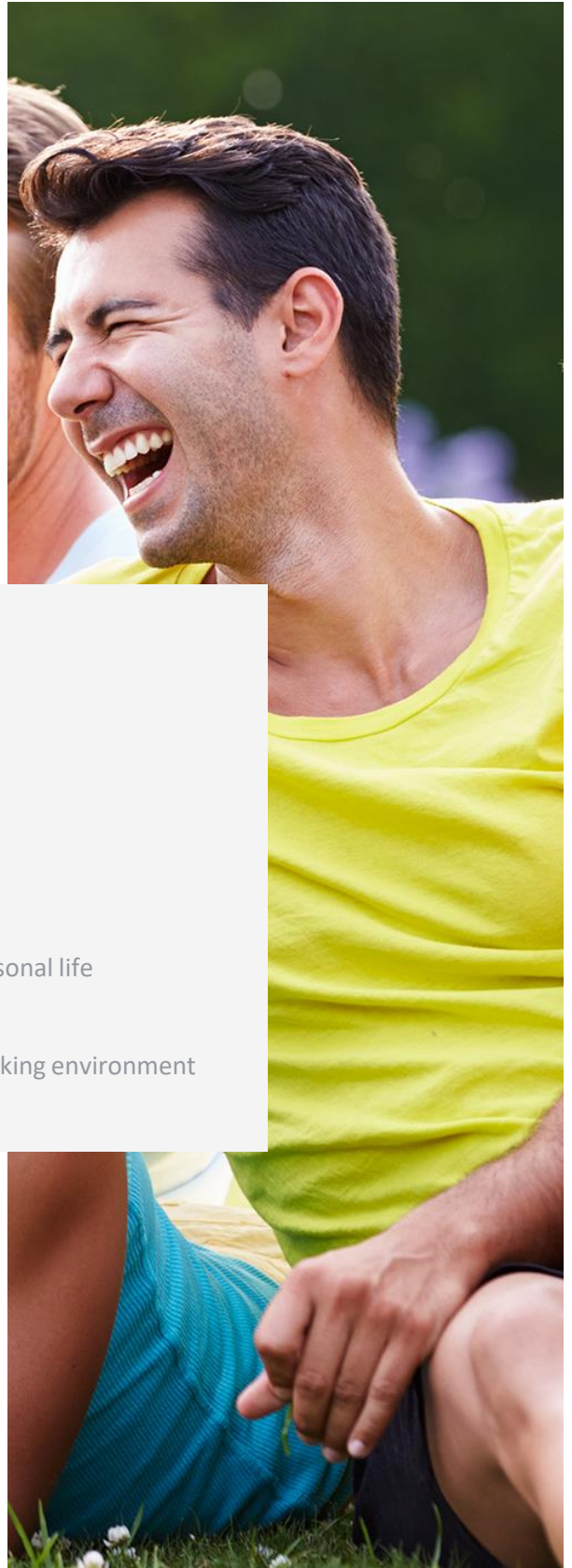
## How important are for generation Y the following aspects regarding the office space?





## Which are the most important complaints of generation Y regarding their actual organization?

1. Insufficient natural light
2. Heating, Ventilation & Air conditioning
3. Not having a balance between work and personal life
4. Not enough parking lots
5. Insufficient work space for me, crowded working environment



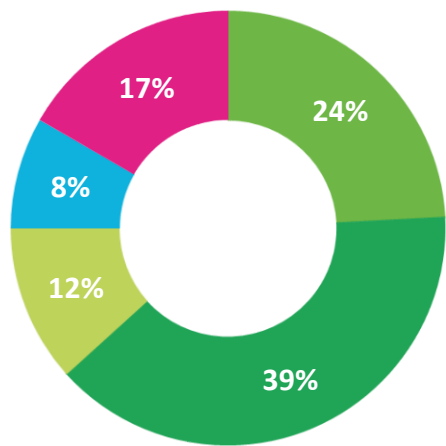
# GENERATION X

(MILLENNIALS 1965 -1980)

Sceptical, globally concerned, tech savvy, concerned about safety and security, flexible, individualistic



# How satisfied are you with the current location of your office building?



- Very satisfied
- Somewhat satisfied
- Somewhat unsatisfied
- Very unsatisfied
- Neither, nor

## Satisfied? Why?

Accessibility - by public transportation  
Accessibility – by car  
Amenities in the area, restaurants, pharmacies, food stores, ATM

## Where they are working, by sub-market location

West	24%
North	21%
CBD	10%
Pipera	13%
Central	23%
South & East	9%

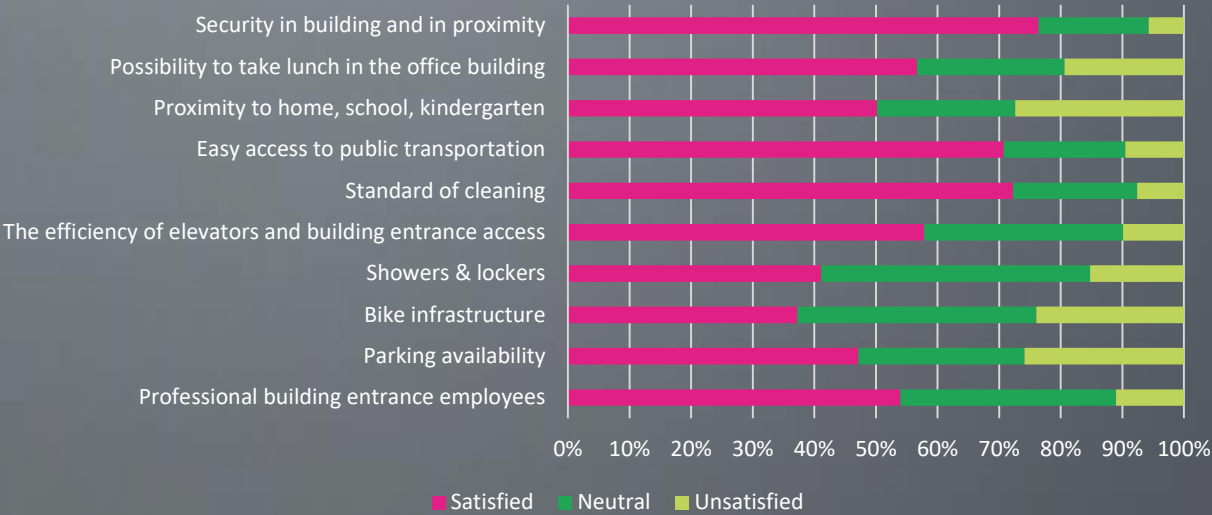
## Commuting time

30-60 Min	56%
15-30 Min	21%
10-15 Min	13%





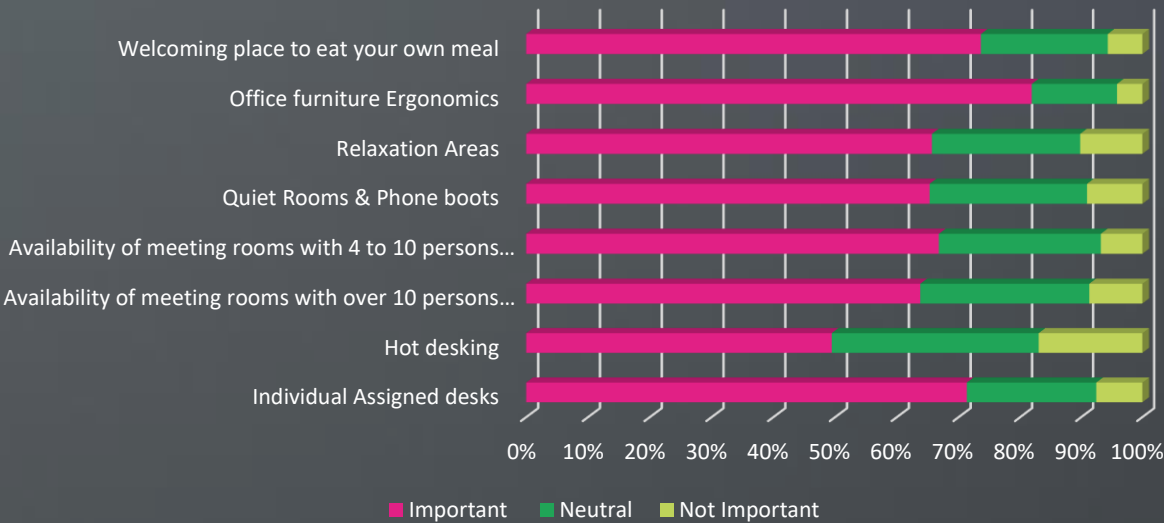
# How they feel in the current office building?



# What type of working space they prefer?

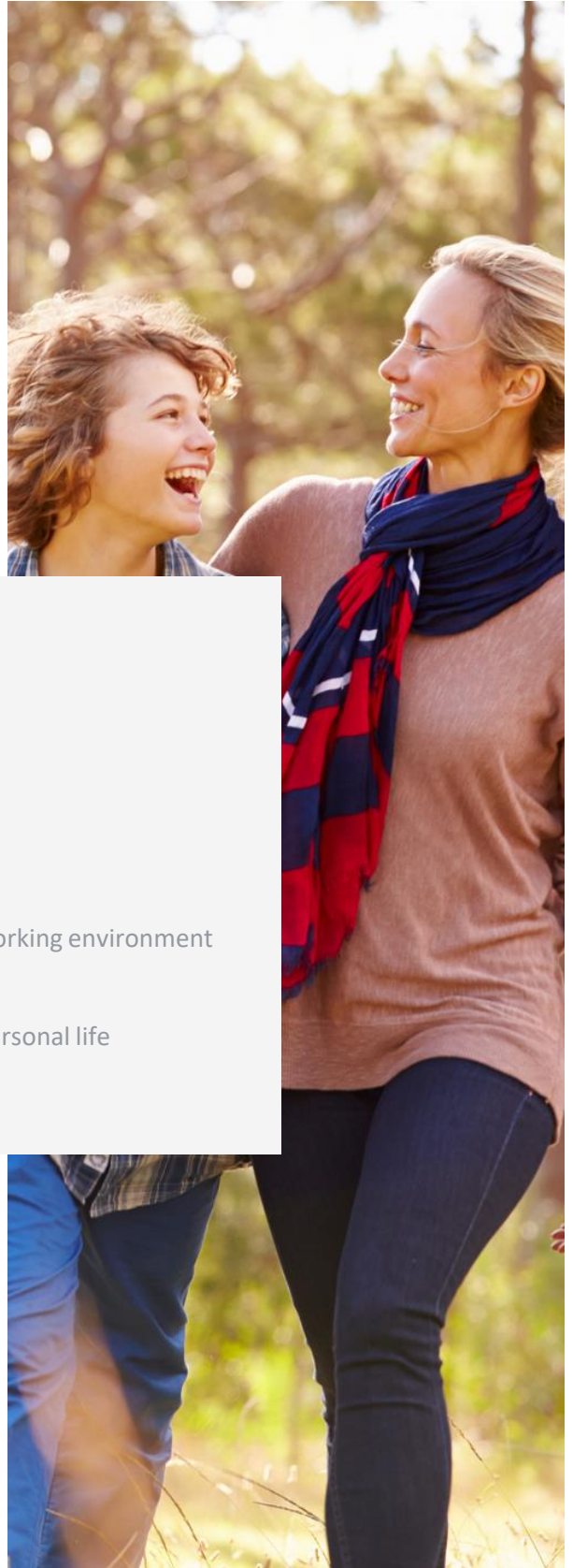
Open Space	18%
Divided individually	26%
Divided by department	56%

# How important are for generation X the following aspects regarding the office space?



## Which are the most important complaints of generation X regarding their actual organization?

1. Heating, Ventilation & Air conditioning
2. Insufficient natural light
3. Insufficient work space for me, crowded working environment
4. Not enough parking lots
5. Not having a balance between work and personal life



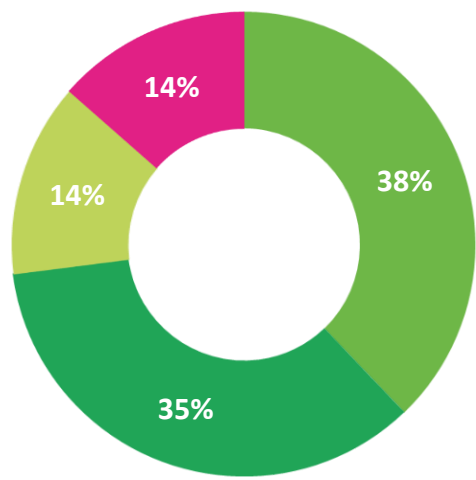
# GENERATION BABY BOOMERS (1946-1964)

Tolerant, Self-sufficient, hardworking, disciplined,  
committed, respect to be respected, team-player





# How satisfied are you with the current location of your office building?



- Very satisfied
- Somewhat satisfied
- Somewhat unsatisfied
- Very unsatisfied
- Neither, nor

## Satisfied? Why?

Accessibility - by public transportation  
Accessibility – by car  
Amenities in the area, restaurants, pharmacies, food stores, ATM

## Where they are working, by sub-market location

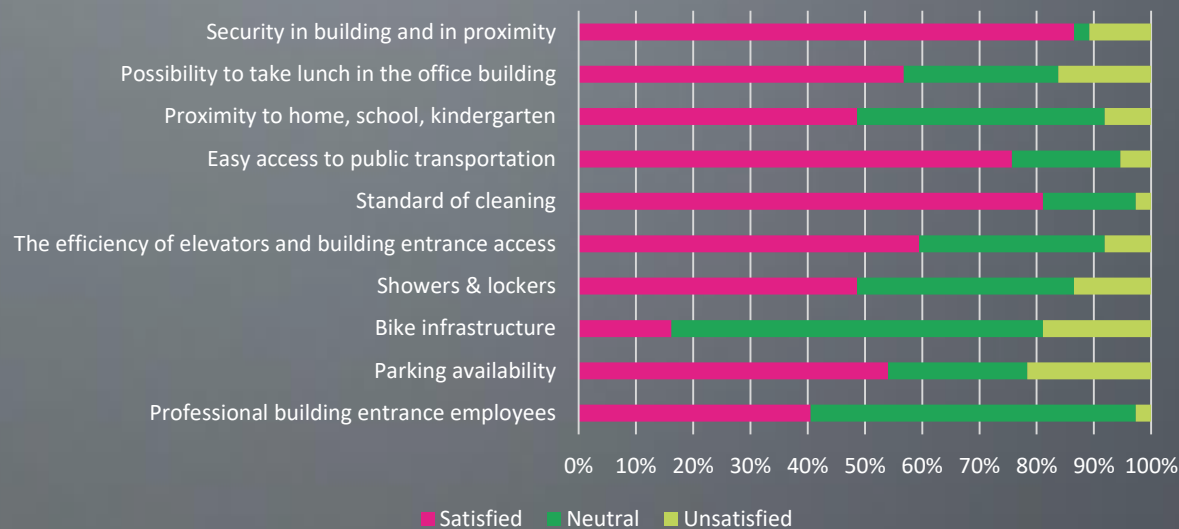
West	24%
North	11%
CBD	11%
South & Pipera	6%
Central	41%
East	8%

## Commuting time

30-60 Min	54%
15-30 Min	32%
10-15 Min	8%



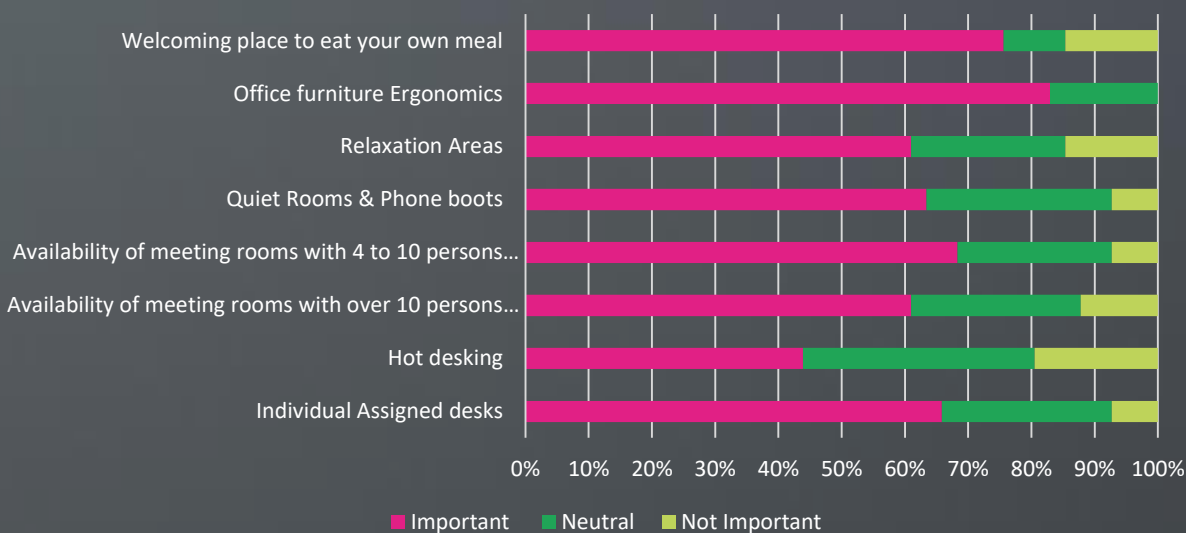
## How they feel in the current office building?



## What type of working space they prefer?

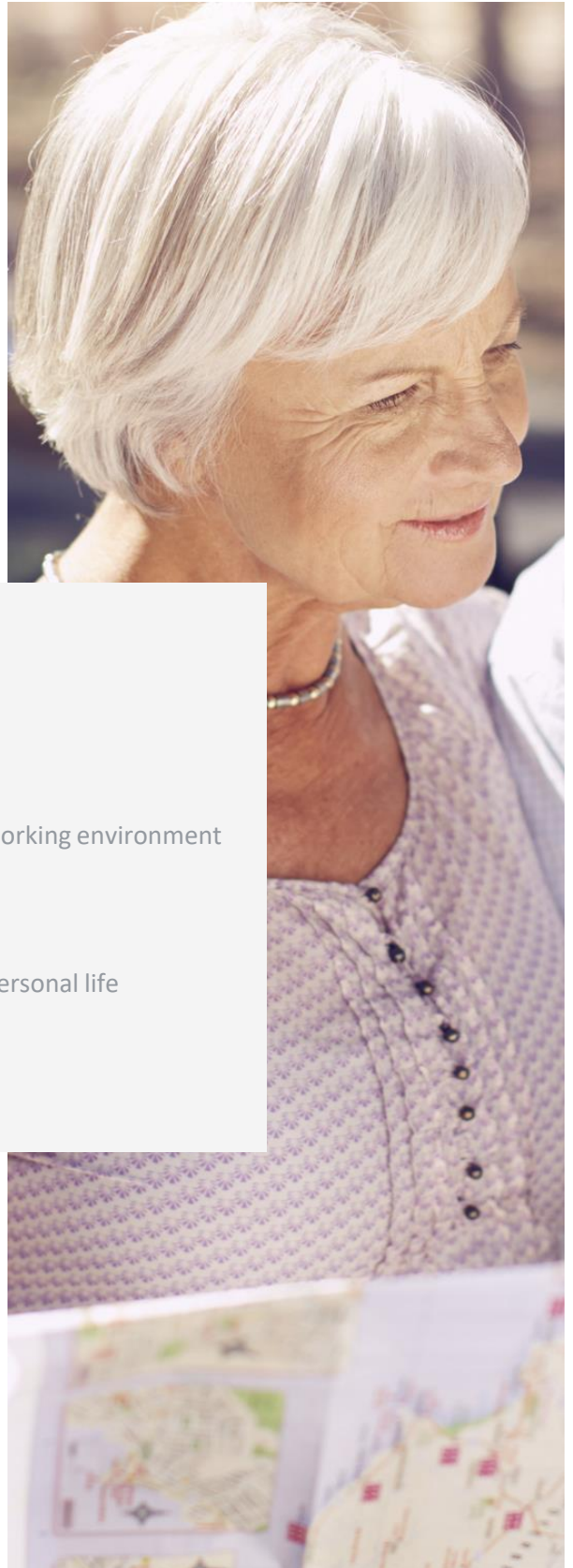
Open Space	19%
Divided individually	31%
Divided by department	50%

## How important are for generation baby boomers the following aspects regarding the office space?



## Which are the most important complaints of generation baby boomers regarding their actual organization?

1. Insufficient work space for me, crowded working environment
2. Absence of showers & lockers
3. Not enough parking lots
4. Not having a balance between work and personal life
5. Outdated interior organization





# KEY FINDINGS

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80% of the respondents are working in big companies with over 100 employees and 9 out of 10 work in an office building. 1/3 work in district 1 of Bucharest. Half of the respondents prefer a working space which is divided by department, while ¼ prefer an open space or space which is individually divided.

Regarding available amenities at the current job, the majority have ATMs (51%), 47% have a restaurant/cafeteria or a coffee shop (43%). However, 1 out of 5 respondents declared that there are no available amenities in the office building, especially those who work in unconventional offices.

Employees who work in Bucharest tend to be somehow satisfied with the current location of their office building. 1 out of 5 employees is unsatisfied, while 3 out of 5 are satisfied.

The majority (55%) spend between 30-60 minutes until they arrive at their workplace. Employees who need less than 30 minutes before reaching the office are more satisfied with the location of the office building than those who need more time.

The factor which brings the highest amount of satisfaction with the office location is the easy access to public transportation (76%). Also, the presence of several amenities - pharmacies, restaurants, ATMs, etc. (43%) and easy access by car (40%) are other necessary drivers for employee's satisfaction. Approximately 4 out of 5 employees are satisfied with the security in and around the building.



# KEY FINDINGS

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Also, the cleaning (71%) and the easy access to public transportation (68%) help build satisfaction toward the office building in which they work.

Concerning dissatisfaction, the difficult access for public transportation (44%) and the insufficient number of amenities available (39%) are some of the most important reasons. Also, employees who work in Bucharest are unsatisfied with the parking availability and the proximity to home/school.

After work activities are an essential factor when choosing a job but not a decisive one in half of the cases. Young employees, aged 18-24 are the most influenced age group by life after work.

When rating the amenities available in the actual working space, the ergonomic furniture (82%), the welcoming place for eating (78%) and the individually assigned desks (72%) are the most critical aspects. The least valuable character seems to be hot desking (47%).

Overall, the heating, ventilation & air conditioning represent the most mentioned complaint (40%). The insufficient natural light is positioned on the second place (37%) and the third place is shared by the too crowded space (36%), along with the insufficient parking lots (36%). The noise level in the office is also a vital source of dissatisfaction (32%), especially for young employees.

# CONTACTS

To learn more about CBRE Research, or to access additional research reports, please visit the Global Research Gateway at: [www.cbre.com/researchgateway](http://www.cbre.com/researchgateway).

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