



WELLBEING | BALANCE | PRODUCTIVITY
WORKPLACE

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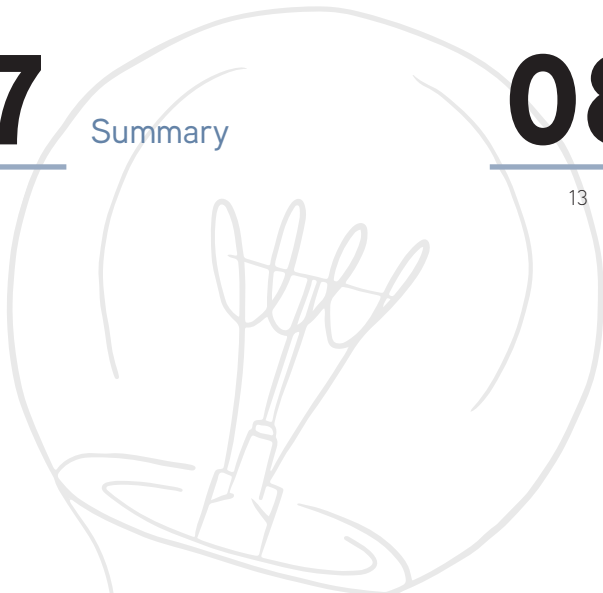
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Without people, workplaces are, quite simply, just empty spaces.

No amount of AI will completely replace us all ... well, at least not yet! So, to focus our attention on a company's most valuable assets, its people, and to really begin to understand what it is they want and look for in their existing or future workplaces, we really need to go to the source.

Over the past 18 months, up until December 2019, we have collected responses from more than 2,000 employees of mainly international companies of different sizes, varying activities and operations in Prague. The respondent's companies included financial institutions, a variety of mid-sized companies, as well as those from the FMCG sectors.

These companies all approached us to advise them and to help them with the implementation of new ways of working, whether that be the introduction of desk sharing and/or the introduction of a more agile working environment.

The key point here is that all of these companies understand that change is needed to remain competitive, in what is currently a very tight labour market, and to attract and retain the best talent. They are all looking to create new, modern, flexible and inspiring office environments for their people and to become more productive.



68%

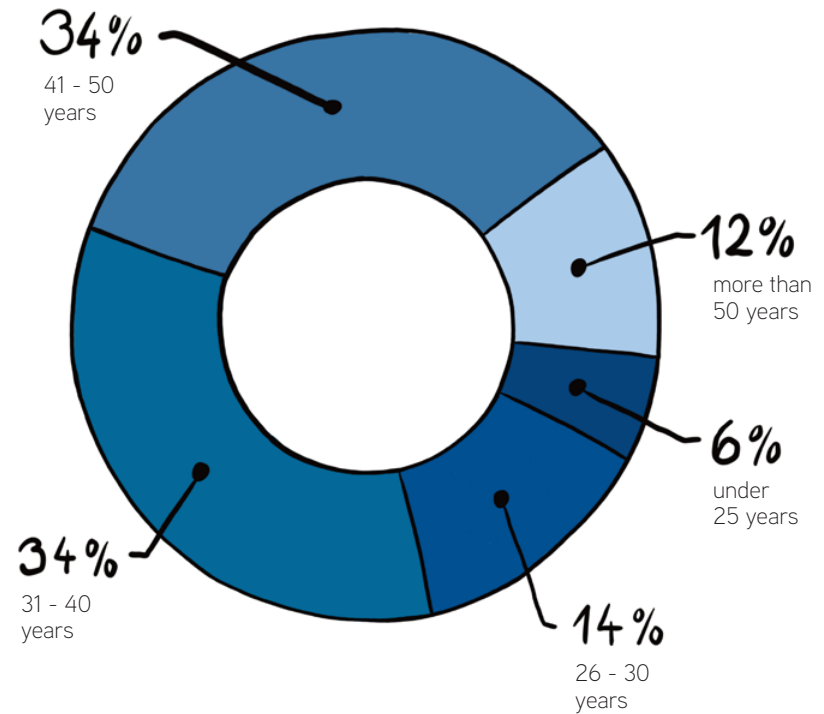
of respondents to our survey were aged

31 to 50 years

With the age of retirement getting longer for some people and with modern healthcare helping us to live longer, it means that our colleagues and employees can be quite varied in age. It is increasingly common to see multiple generations working together and we must be careful not to overlook this fact.

From the companies we worked with ca. 68% of respondents were aged between 31 to 50 years. The groups of employees aged 26-30 years and those who are 50 years or more, each made up ca. 13%. In summary, we can state that our survey represents the opinion of a large group of experienced, economically active employees and is not based only on millennials or Generation Z (only 6% of our respondents).

Respondents' age



How Do You Work Today?

Lone wolf or part of the pack?

Regarding the current working practices, more than 80% of employees stated that they work individually at a single desk, in addition to collaboration with other colleagues at joint nests of desks located within the open plan office.

70% in the office

30% outside of the office

However, almost 40% of employees also work with colleagues or clients at other parts of the office such as meeting points or rooms and informal meeting zones.

Our group of respondents, as of 2019, work mainly at their desks or group of desks with other colleagues and spend 70% of their working time in the office. Ca. 30% of people's time is allocated to home office or working from outside of the office, irrespective of whether that is ad-hoc or regular.



Almost 50% of employees collaborate in groups of up to 5 colleagues which provides a good indication on what type and size of co-working and meeting points that our clients require in their offices. The lack of small sized meeting rooms/points was generally raised as a negative feature of the offices, placed high on the wish list for future change. These meeting points do not necessarily need to be closed meeting rooms, but they should allow some level of sound insulation for the conversations being held. It is also important to make the meeting points easily accessible to the employees who need them, by locating them equally throughout the workplace. Otherwise people will hesitate to use them as intended.

Bricks

What you have versus what you would like to have.

On the topic of the current working environment in our respondents' offices versus what they would like to experience in future, 97% of employees expect the office environment to be a place to meet and support collaboration between colleagues and within teams.



The office environment needs to support daily working activities of the employees which allow them to be productive during the working day. So, what are the major gaps between the existing and preferred future requirements of the employees when it comes to office premises?

The biggest gap between their experience today and future expectations relates to employees' wishes to have the freedom to choose a workplace in the office that best suits their working activity, whether it'd be daily routine work, collaboration with colleagues, focus work or communication / phone calls. These activities need to be supported by different types of workplaces, meaning that activity-based office space shall become a standard in the fit-out of the space - not an exception. The perceived gap is 43%, where only 31% of respondents

experienced the desired freedom and 74% of employees hoped to be able to realise such freedom in their practical daily needs.

74%

of employees would like more freedom to choose the workplace that best suits their activity

03

50%

**of people can choose whether to work in the office
or from any other location**

Around 50% of the respondents today can choose whether to work in the office or from any other location outside the office, i.e. they are supported to work from anywhere. However, the majority of people (90%) would like to have the option and freedom to choose their working location.

The same proportion of employees today, ca. 50%, consider their office premises to be inspiring. This delivers a strong message to both office developers and company management as, unsurprisingly, over 90% of employees would love to be inspired in some way by their working environment and its design.

In summary, happy employees come to the office to meet with their colleagues where they will find different types of workplaces, supporting their daily activities, which will result in higher productivity. When the employee chooses to come to the office, it should be designed to both inspire and to collaborate.



Bytes

Have you tried turning
it off and on again?

04

98%

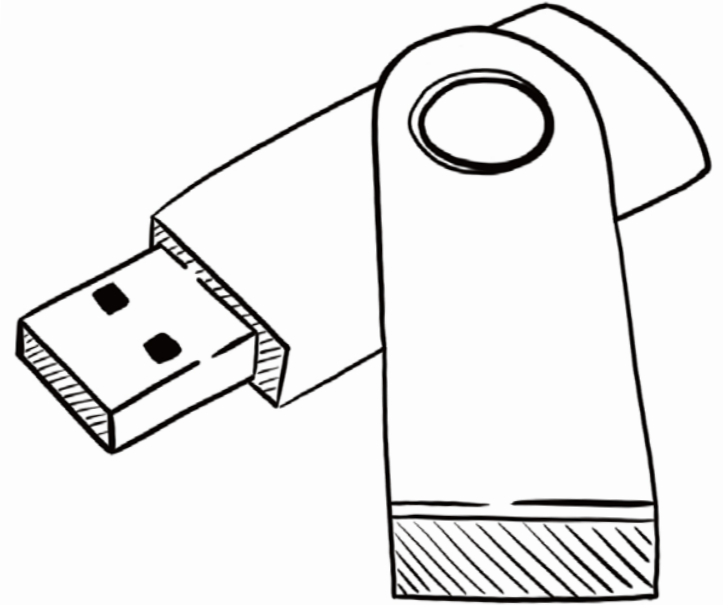
**of people see room for improvement in the technology
necessary for their working activities
and performance**

How do the employees of our clients view the availability and use of technology in supporting their daily work?

The majority of the employees (79%) already have access to a range of technologies, applications and hardware necessary for their working activities and performance. However, there is still plenty of room for improvement in this respect with 98% of employees wishing to have this level of support as a basic requirement these days.

36%

of employees under the age of 25 feel they have the technology to work from anywhere



Based on responses received, we understand that the tech used for daily work does not always support working from anywhere as people would expect. Only 51% of employees were satisfied and more than 90% of employees would welcome such an option. The largest gap is seen by employees under the age of 25 years where only 36% state that they have the technology that enables them to work from anywhere.

Another topic that we find interesting and one that is not often visible, is the ability for employees to use video conferencing tools provided in their meeting rooms or available to them as part of the company's ICT systems. Less than 50% of

the surveyed employees state that they know how to use the video conferencing (vc) technology of their company. This could demonstrate a lack of training for employees and a big opportunity to increase the efficiency of employees in their work as the technology may help them to be more productive and, as a result, be more satisfied with their job. We see this as an important topic to be investigated by every company using VC tools for both internal and external collaboration.

Behaviour

It's my way or
the highway!



Flexible working arrangements and their impact on the productivity of our clients is a regular topic of discussion. How flexible would employees like to be? How much flexibility should be provided? And how does the company support them?

Only 37% of respondents stated that they can decide how and where they will perform their work. 85% expect to have such freedom in the future. The message to employers today is to seriously investigate options to introduce flexible working within their company and, through this factor, improve the employee engagement. The change of management style from controlling to objective/goal orientated management is crucial with such change but, it is increasingly expected by employees.

05

85%

of people expect to decide how and where they will perform their work in future

Two Days

is the number of days per week that employees typically work from home or outside of the office

We see many different systems of flexible working, from flexible working hours only, which seem to be standard these days, through to full flexibility and choice of the employee to work from the office or from anywhere. Most companies try to introduce some rules for working outside of the office, for example a maximum of 8 days a month and the employee can choose whether it will be on an ad-hoc basis or regular. However, we also see companies where fast growth and a lack of available office accommodation in the property leads to full home office work. This means that employees come to the office to attend regular team meetings and the rest of their work is done elsewhere. Such a structure can apply to many different businesses, including modern call centers.



On a different note, 60% of employees state that once they come to the office, they feel most productive if they are working with their team and can exchange information, ideas and communicate easily. 36% of the employees expect the freedom and right to choose the workplace within the office which most suits their work activities and plans for that day.

In summary, we often recommend to our clients that creating a team home base for their employees and departments will bring positive effects to the overall performance of their people. These home base zones should be combined with common or social lounges which will support more flexible employees and provide more space for ad-hoc, informal meetings.

Branding

Be loud and proud!

96%

of employees would like to be inspired and enjoy the look & feel of their offices

When speaking to our clients and their employees, many of them say that their current working environment is uninspiring and they do not feel creative in any way.

How does this happen when most companies allocate a lot of finances to creating office environments?

Well, in short, it is very important to find out what employees appreciate about their job and what inspires them. 96% of employees would like to be inspired and enjoy the look and feel of their offices. Of course, each company may arrive at a different style and design but, the communication with and feedback of their own people is very important for the final result.



Summary

These are just a few examples of the answers to questions that we ask our clients and their employees but, when asking people to take part in our surveys, we ask them to select the most important factors connected with the working environment and company culture, factors which shall naturally connect with the future change of their working environment.

The overall result is a combination of 3 key expectations – happy employees who are respected in their work/life balance and get support to maintain their health and wellbeing. These are factors that should be expected and natural but are always connected with the levels of efficiency and productivity at work.

They lead to success and satisfaction in the job and further to higher levels of engagement within the company. And it is those factors that always combine bricks, bytes, behaviour and branding inputs received from the employer.

We have seen beautifully designed offices which did not lead to employee engagement, simply because the behaviour in the offices, management style and culture of the company was not connected with the working environment.

On the other hand, we have seen highly engaged employees where the company still has room to improve and grow their teams through improved design, technologies and even the location of the offices. In the cases of our clients, company management only learnt this important feedback after choosing our services and receiving our detailed analysis.

07



| Happiness
| Balance
| Wellbeing

Happy employees are respected in their work/life balance and get support to maintain their health and wellbeing. These are the three key expectations from employees that lead to their overall feeling of success, satisfaction and engagement within a company.

Our Approach To Workplace

Work is changing and so is the workplace...

Workplace strategy used to be about maintaining facilities and trimming expenses... but it is not that simple anymore. Businesses need to create workplaces that not only attract, but also retain, the best talent, adjust to shifting workforce demographics and promote employee wellbeing while staying ahead of new demands and technologies.

All of this must be accomplished while containing costs in an increasingly competitive recruitment and retention landscape.

Colliers International takes a holistic fact-based approach to creating empowering working environments that are future proof. If you are considering a change to your working environment, planning to review your business model, changing headcount; or if you want to increase employee engagement and become an employer of choice, Colliers International's Workplace Advisory is here to help you make the right choices.



Our Service Offer

Making the right choices when it comes to your office premises and the happiness of your people can be challenging and stressful. So, why not let Colliers do all the hard work and free more time for you to focus on your business?

We offer a full range of services taking you from start to finish:

- property search and selection
- lease negotiation/renegotiation
- workplace advisory
- space planning
- design and build (fit-out) turn key solutions
- moving and project management

Please contact any of our team members to discuss your plans.

09

**Is your company new,
growing or restructuring?**



Service Lines



Office Agency



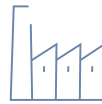
Building Consultancy



Real Estate Management Services



Tenant Representation



Industrial Agency



Valuation and Advisory



Workplace Advisory



Retail Agency



Research & Consultancy



Design & Build



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