

Working From Home Survey

REPORT FIGURES

Poland

CBRE RESEARCH
NOVEMBER 2021

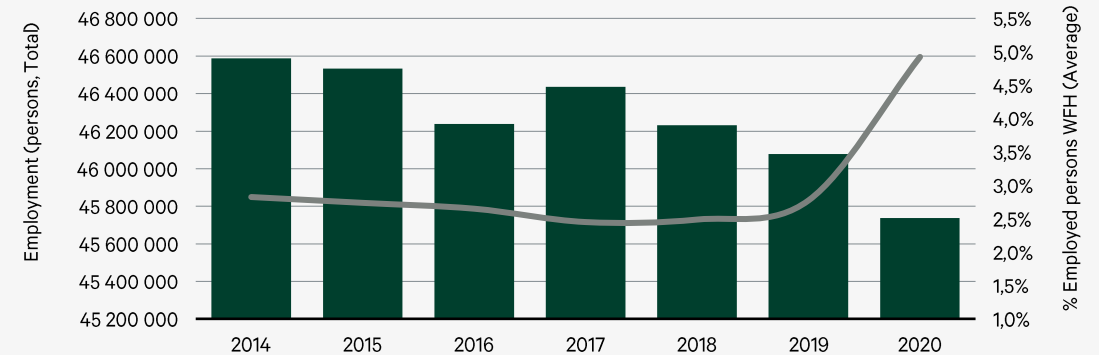
The aim of the survey

Working from Home 2021 edition is a special report that aims to find out how employees have dealt with splitting their time and living space between personal and work tasks.

The survey took place for approximately one month, in July 2021, more than a year after the lockdown period among total of 1,703 employees from eight countries (Poland (36%), Czech Republic (13%), Hungary (25%), Romania (15%), Slovakia (10%), SEE region (1%).

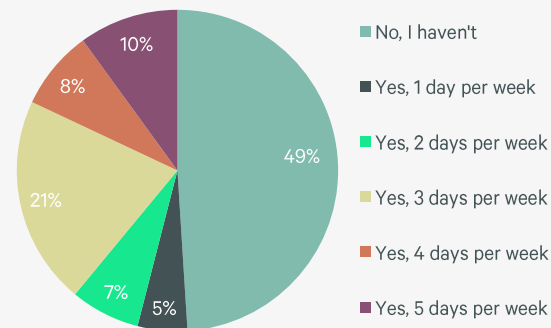
The great majority of the respondents, meaning 70%, is working in multinational companies, while the rest are coming from private local or state-owned companies. When looking at the employees' day to day job, most of them, respectively 40% are experienced workers and 24% are senior executives.

Office based employment and the share of people working from home



Source: Eurostat 2021

Have you returned to office?



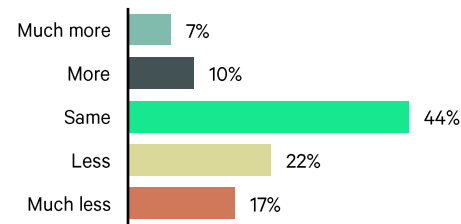
How many respondents?	617 answers
What age?	29% - 26 – 35 years old 25% - 36 – 45 years old
What gender?	55% - female
What company size?	78% respondents work in multinational companies
How big is the company?	70% >100 employees
What job role?	38% experienced worker & 31% manager
What Sector?	14% Real Estate, 14% Professional Services & 13% IT & C /Technology

Where are we compared to a year ago?

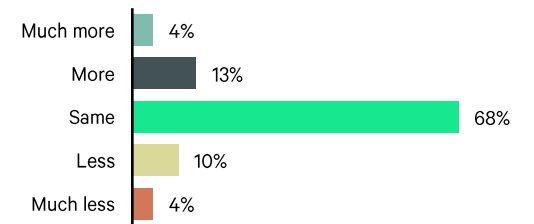
Key takeaways:

- Most of the respondents don't feel 2021 is any different to 2020 in terms of feeling tired, interacting with the manager and collaborating and other current issues of the workplace.
- A positive outcome is that 39% feel less tired after a typical working day
- Work-life balance has also been assessed as better for 31% of respondents
- 31% also feel more prepared to complete the given tasks than they were a year ago

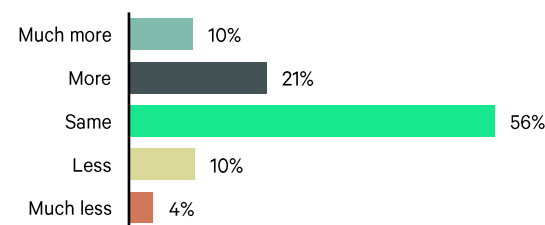
Tiredness after a typical working day



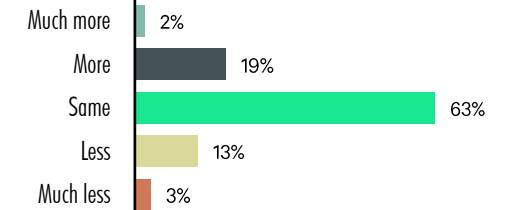
Clearness about priorities & expectations



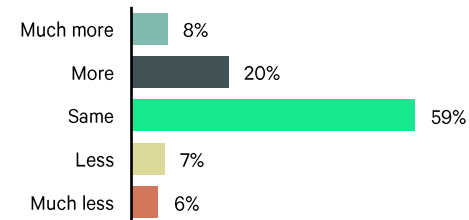
Sense of capability to complete the specific task



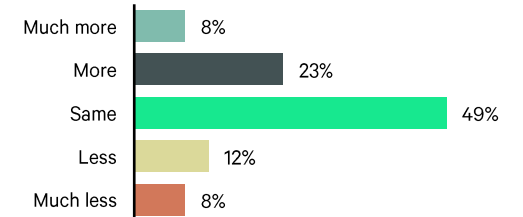
Difficulty in working with clients



Home desk readiness for the specific task



Balance in the work - life equilibrium



We want offices back, however...

Top factors that make working from home difficult or even impossible

Even if most of respondents declared they didn't experience any difficulties when working from home, amongst the inconveniences of WFH were top listed:

- ✓ Need an access to paper documents that must be stored in the office
- ✓ Poor internet connection
- ✓ Have no proper workstation (ergonomic, daylight, size, monitor, etc.)
- ✓ Need more support or spontaneous communication with their teammates
- ✓ Have no or not properly working software tools (communication platforms, data access, etc.)

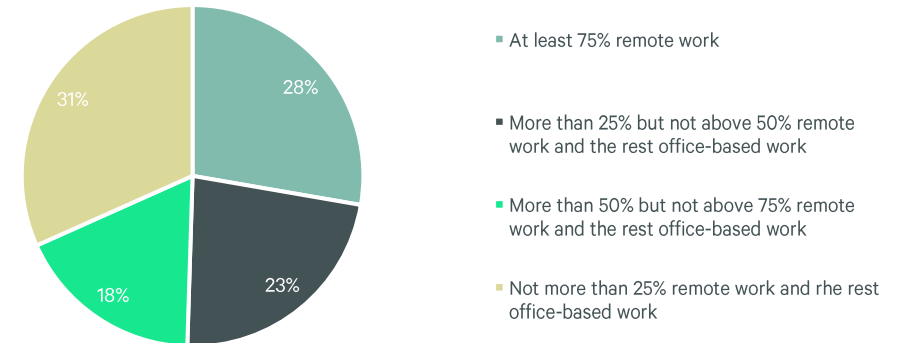
60% respondents think that programs supporting mental health are important

34% didn't receive any support from their employer

Top 3 reasons to come back to the office when possible

- ✓ Regeneration & socializing
- ✓ Building relations
- ✓ Team meetings

Preferred weekly time split between remote and office-based work



Learning from our experience

At a personal level, the Covid-19 for sure left some marks, and when it comes to work the positive outcomes were mirrored according to the survey's respondents in the gained independency and productivity.

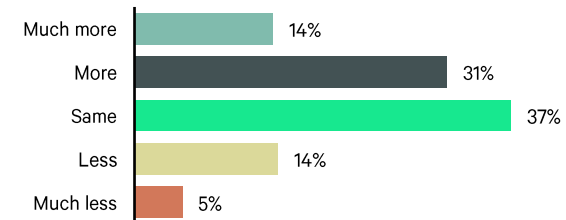
Top 5 biggest challenges experienced during the Covid-19 period

Working through Covid era the biggest challenges for responding employees were:

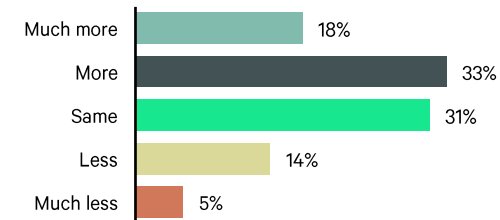
- ✓ Working longer hours
- ✓ Feeling psychologically drained
- ✓ Feeling detached from their team
- ✓ Having no time for social life
- ✓ Feeling detached from the organization

Individual changes after the Covid-19 experience

More accountable for the delivered business results



More control over the work organization



Retaining talents

- Joanna Wanatowicz, Managing Director, Grafton Recruitment
- Ewa Michalska, Recruitment Director, Grafton Recruitment

Back to the office - yes, but adopting a hybrid work model

After almost one and a half years of life with the COVID-19 pandemic, we know that changes in the way we work, how we perform work tasks, its essence and the recruitment of employees are irreversible. So much so that in some industries an offer without the possibility of "remote working" would not be considered by our candidates. On the other hand, both employers and employees emphasize that office work is needed.

We need meetings with colleagues, joint project discussions, or even access to office equipment such as a printer or scanner. However, the office is a place where time is devoted primarily to professional matters and training to practice a profession. Even the most technically equipped home, with a separate work-space, has more distractions and no boss's watchful eye to spot mistakes made by newcomers while on the job to help them do their jobs better.

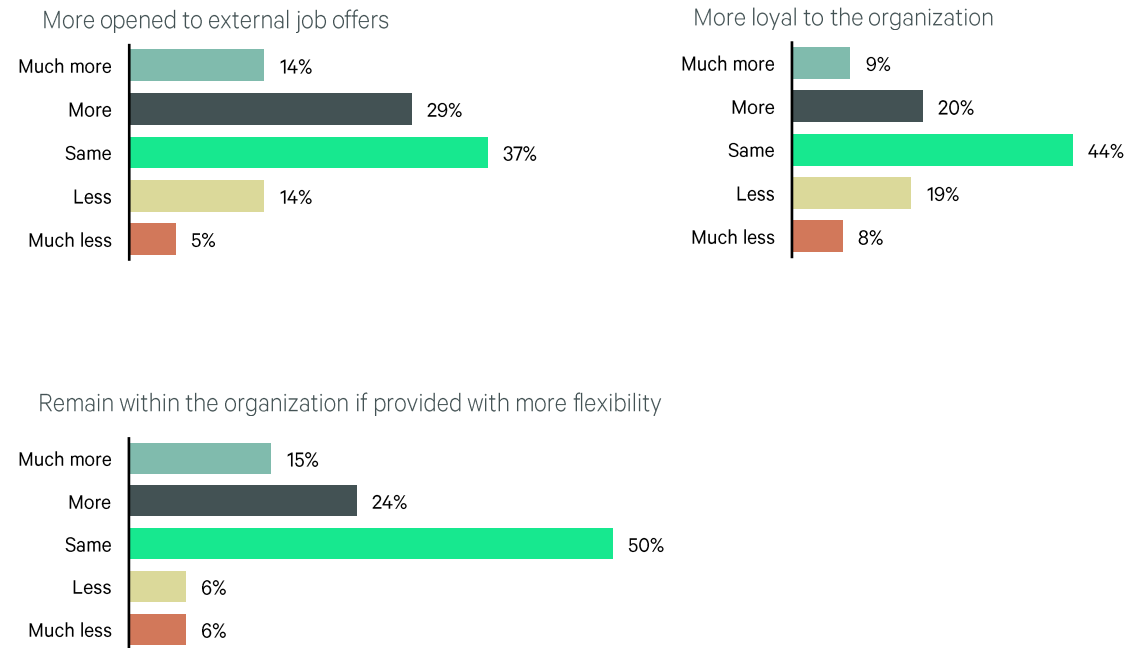
We know from our research and interviews with candidate specialists that they prefer a hybrid work model. The value for them is the ability to work from home, because they save time and money on commuting to the office. Time with family also resonates very much in our conversations and research.

How, then, would the majority of the specialists we recruit like to work?

One or two days in the office is an ideal solution for them. They would like to perform their duties remotely the remaining days. As the candidates indicate, the need for a return to the office includes meeting other people, exchanging views, confronting ideas. It is building relationships and drawing inspiration from other employees that is the greatest motivator for them to work in the office.

The specialists we are seeking on behalf of employers, care about a friendly work environment, an empathetic boss and a good salary. They want to feel appreciated and noticed - especially when working remotely. And this is a challenge today for companies and bosses who are looking for committed and loyal employees. The current time of adapting to work in the new model is the time for real leaders. Those employers who can handle it, will get results and satisfied employees.

Loyalty towards employers under Covid-19 experiences



Workplace

– combining home and office

– Małgorzata Niewińska, Head of Workplace Strategy & Change Management, CBRE

We miss normal. Why? Because it satisfies a fundamental human need: security. We often accept standards, generally accepted rules, even when they do not suit us, but are known, and therefore predictable and safe. As far as workplace strategies go, the innovation limits have always been determined by an old standard: the model anchored with the office as default choice.

Today we know that the old norm era is over, and that it is impossible to return to because a cultural change has taken place. We have stopped believing in the validity of the previously binding norm stating that the office is the key and the best place to work. A change of beliefs on a massive scale in such a short time could only happen due to the Covid trauma that fell on us like a bolt from the blue. Changes in spatial solutions follow cultural changes - they will adapt flexibly to the new needs of increased distance, acoustic insulation or frequent rearrangements.

The standardization stage so far still looms on the horizon. We are immersed in stormy discussions about the future of the work environment, where experts do not speak the same voice. However, between the extremes - traditional and fully distributed models - the supporters of hybrid solutions sound most clearly. Hybrid models dominate the discussion today. And they will constitute the fundamentals of a new standard, which will change the equilibrium point of the entire working environment. The proportions between working from the office and working from home will be in the range between 40-50% of remote work and 60-50% % office work. Already today, 66% of decision-makers in organizations are considering rebuilding their work environment in terms of adapting to the hybrid model, and among the surveyed employees 67% want a balance between the office and remote work.

Hybrid model:

- ✓ I am not aware of any upcoming changes
- ✓ Changes in the Home/Remote office regulations
- ✓ Office social distancing
- ✓ Office improvements to support hybrid collaboration
- ✓ Changes in regulations on flexible working hours
- ✓ Implementation of booking application
- ✓ Use of external flexible offices

Workplace

– combining home and office

Then what will this new standard be and what will really change in the working environment? Key areas of change, and at the same time a list of key topics that, in my opinion, will determine the agenda for discussion in the coming months or maybe years, are listed below.

Areas of change:

– 1. Employee as a consumer

Under the Covid influence organizations have started to notice and listen to their employees – they become more ‘human centric’.

– 2. “Releasing” work from space

More specifically from the office space. Work became an autonomous, mobile phenomenon not tied to a specific place. 73% of respondents expect flexible forms of work and want to control where, when and how to work. Today, however, only 46% receive support from their employer to organize the infrastructure at home to ensure efficient work and no technological disruptions.

– 3. The meaning of the office

The offices will stay. They will lose their importance in the time dimension, but they will gain in quality - as part of fulfilling specific functions that we will make use of more consciously. Too much cutting of the surface based on only one criterion: savings, may result in significant costs in the long run, measured, for example, by a decrease in productivity.

– 4. Redefining the organization's community

The intrinsic motivation to go to the office has less to do with outcomes and goals than the desire to belong and be part of a larger whole. It is important for people to create and invent something with like-minded people, build and maintain a network of contacts, develop a career, and gain trust in the professional field.

– 5. WELL strategies as a guarantee of the quality of life in the workplace

If thinking in terms of solutions supporting well-being did not appear in organizations before, the context of the pandemic forced it by itself. Here and now organizations should focus on how to strengthen the sense of security by talking to people in the organization and providing them with as much information as possible about their environment strategy.

– 6. More accountability on the employees' side

This will mean less control and increased trust as one of the core values of the organization. At the same time, it presents a number of challenges for the leaders. Are their employees committed? Are they able to inspire instead of control? Now is the time of creating or reviewing organizational cultures so that the office is a place where we go because we choose to.

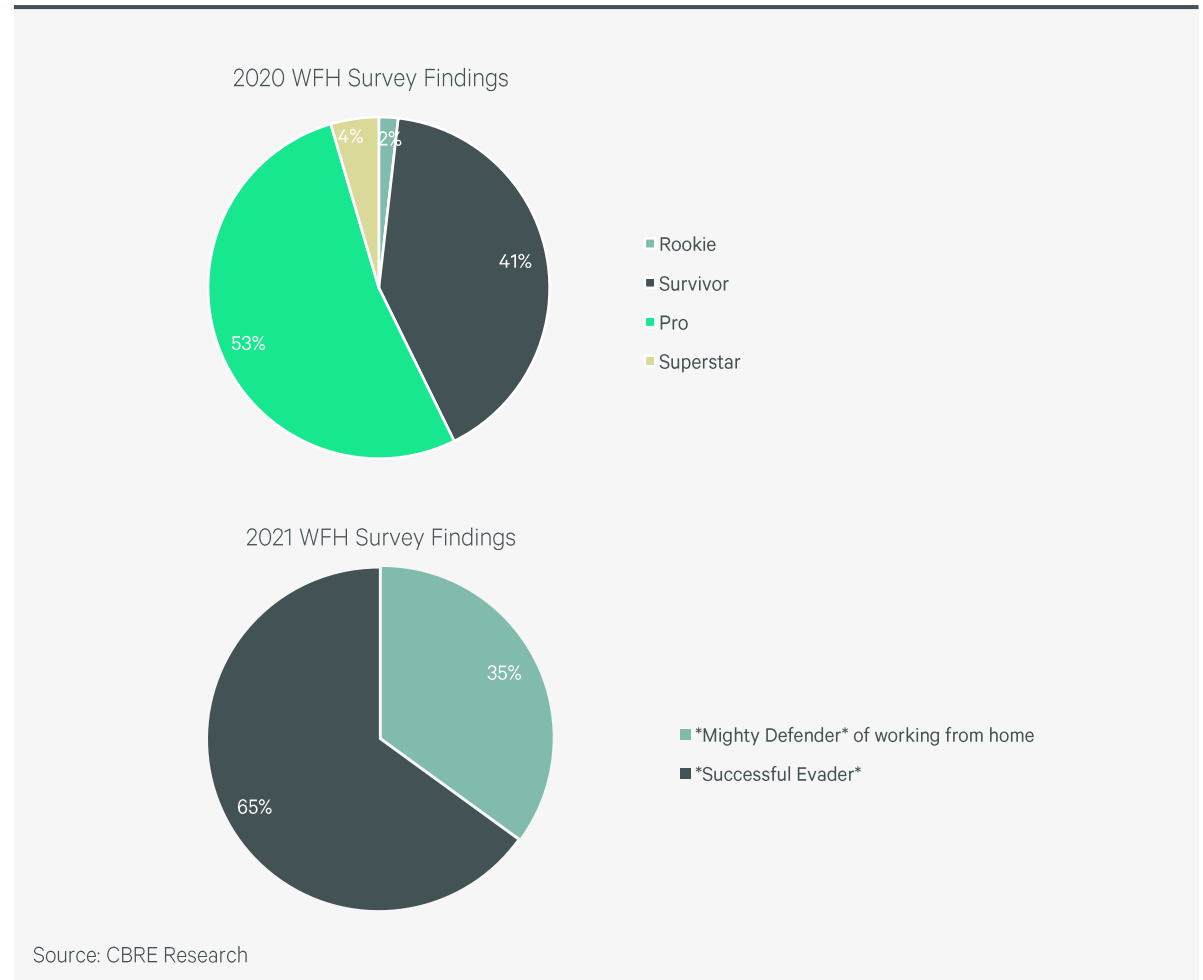
Conclusions

- have we learned the lesson?

The adaptation is one of the main characteristics that kept humans evolving and change to new and better versions of themselves. After a 2020 that changed nations and economies to the core, the workspace got caught in the middle and was forced to change in order to survive and be operational in the most safety way for its users.

During the transformational process, working from home was highly adopted by most employees either it was mandatory or a precautionary choice. Looking back, based on 2020 WFH survey conducted in the turmoil of events, almost half of employees across CEE found themselves in the “survival” mode (49% of respondents), trying to juggle between personal and work life on a territory previously dedicated exclusively to personal matters. After approx. one year, 52% of responders to 2021 WFH Survey proved to be “Mighty Defender” of working from home, attesting the great flexibility both employers and employees can have in challenging times as well the necessity of the traditional workspace.

Transforming threats into opportunities, the workplace is as well adapting to all new safety regulations, allowing employees from all domains of activity to perform their jobs in safer environments, cause after all, almost half (48%) of survey respondents is looking forward to successfully evade the fully working from home era.



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