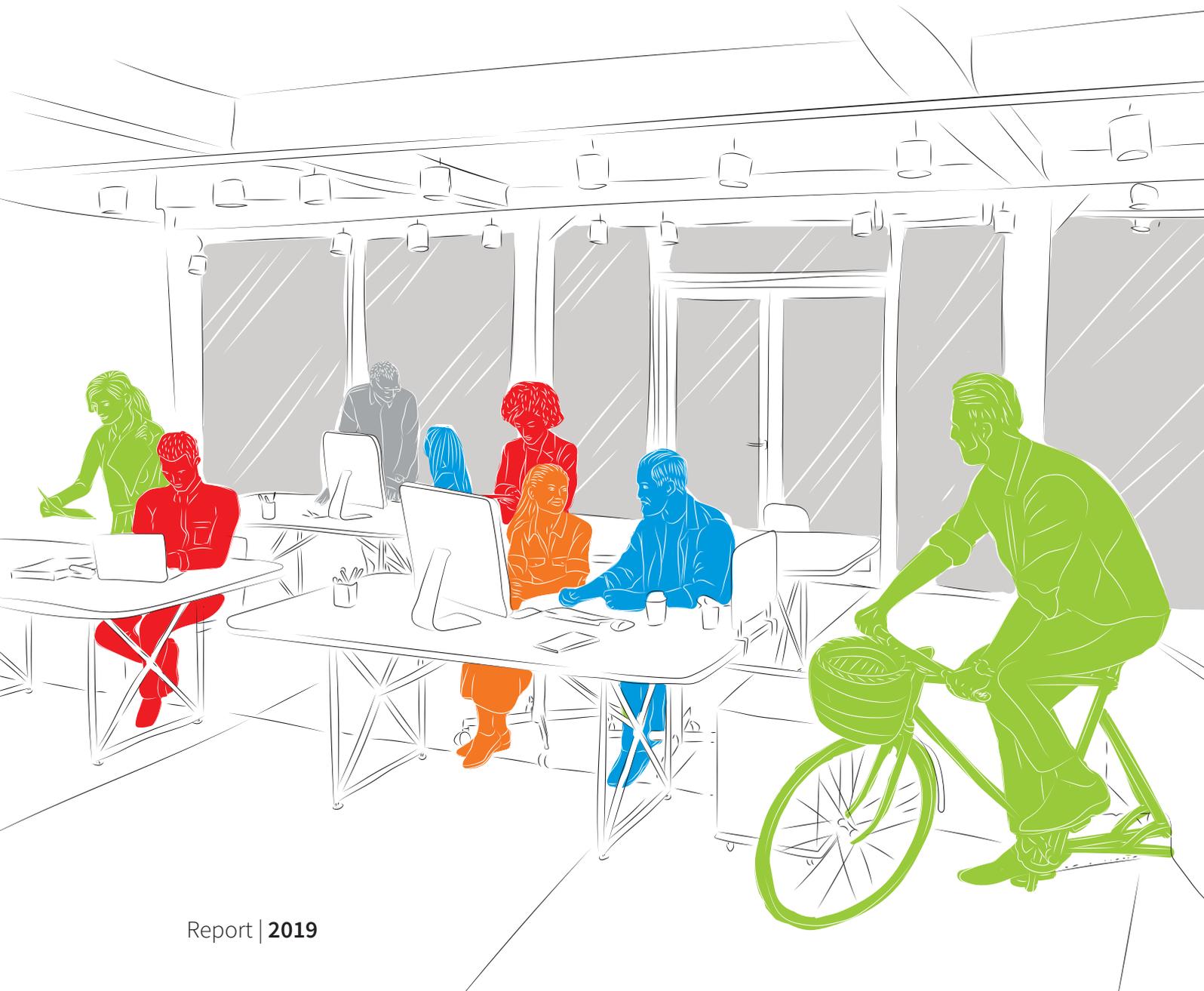


# Diversity

in the workplace:

how to deliver **future-proof** offices



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Modern offices are no longer just rows of desks and randomly working coffee machines. They are also not places where you spend eight hours only to feel relieved when you are finally leaving. They are not sites for downtime between family obligations and after-hours social life. Last, but by no means least, they are not places you hate to be in, or at least they should not be.

It is crucial to make informed decisions when designing new office premises. Get to know your staff's office space needs, then tailor the space in order to boost the productivity and creativity of your employees. It is beneficial both to them and the company. Office, and the experience it evokes, can and should be considered as a great benefit in Employee Value Proposition of each organization. It also makes recruitment processes easier and, above all, keeps employees happy.



**Anna Bartoszewicz-Wnuk**  
Head of Workplace Advisory, JLL

## Why **Diversity** matters?



**Anna Marciniak**  
HR & Administration Director at  
Skanska office unit in Poland

This report is based on a survey of 1,000 office staff from companies employing at least 100 people. The respondents come from different backgrounds, different places and are characterised by different approach to life. It was very important for us to actually represent the true structure of people working in modern offices and to get to know them.

It is not an easy job to design an office. The diversity of people working in a given company is immense. We firmly believe that the only way to create a place, not just a space, is to listen. Listen to the upper management, listen to regular employees and incorporate those needs and wants into one solution. People have different styles of working and we need to answer all of their needs. We do accept that challenge.

We are very pleased to introduce this report describing office personalities and their needs and lifestyles. We are convinced that it will help its readers understand how to make any office better.

## Office generations – is age a key factor?

The labour market is a driving force behind the development of the office market. After all, it is people who work in office buildings, and they should be in the centre of building and interior design. The structure of office workers has gradually changed over the last few years. Now all generations work in modern offices, hence the need to diversify interior design.

This brings up several questions that need to be addressed in order to deliver a successful workplace.

**Who** is actually working for corporations now?



### Baby Boomers

This is the most experienced generation of office workers: people born between 1946 and 1964 and the most traditional age group. They are competent, reliable and pay close attention to detail. When they have a job, they do it with little or no complaining. An important distinction is that they are an offline generation, with social media and modern tech playing a marginal role in their out-of-office lives. In terms of office space, they value greenery, both on the premises as well as in the office surroundings, access to the tilting windows and the ergonomics of their workplace. They are used to fixed working hours, they do not particularly need a wide range of amenities around the building. What is interesting is that in their spare time they like to socialize with their friends about as much as the youngest generation – the Zs – do. This may be a result of them having fewer family obligations, as their children are already grown-up.

### Generation X

These are the people born between 1965 and 1979. They are an experienced and significant group. Work is an important part of their lives, they are involved and career-driven. Moreover, they value personal development and independence. What is important for Xs is face-to-face contact with their colleagues. They are familiar with the latest technological advancements, but still prefer actual human interaction. They know how to prioritize, with family and work being the major drivers in their lives. Often they define themselves by their financial status, as financial stability is important for them. Xs value efficiency, and therefore home office options are interesting for them. They mainly work at their own desks, but they are open to technological changes. They want to work in diverse office space, with a variety of available space types. In terms of location, the most important factor for them is a convenient commute, not necessarily a location in the centre of the city.



1946 - 1964

1965 - 1979

### Generation Y

These are people born between 1980 and 1994. They want to feel fulfilled. They want to experience new things, explore interesting ideas and solutions. That need for constant learning should be answered by their office premises. They are always on the move, but that may result in work overload. They know what they want and are ready to voice their concerns, including office interiors. They like eating out, playing sports and meeting their friends after work, and all that requires appropriate infrastructure. They value flexibility, home office and an informal atmosphere at work. They crave interaction with their co-workers and for the office to support their job in a diverse way.

### Generation Z

The youngest of all generations, born after 1995. They prefer instant messaging to actual human interaction, are up to date with all technological advancements. They are people who are about to or have only just entered the labour market. As the survey shows, this is also a generation that has the most negative feelings towards big corporations. There is a vast amount of work to be done by large firms in order to turn round the public image of global companies and make those once again the most desirable career path. Zs want to be able to express themselves and are afraid of being limited, they live in the present, not particularly focusing on the future. They want their office space to be modern, they would like to work flexible hours and they care a lot about various alternative spaces in their office premises. They want some informal, social areas in their offices and a range of amenities around the building.





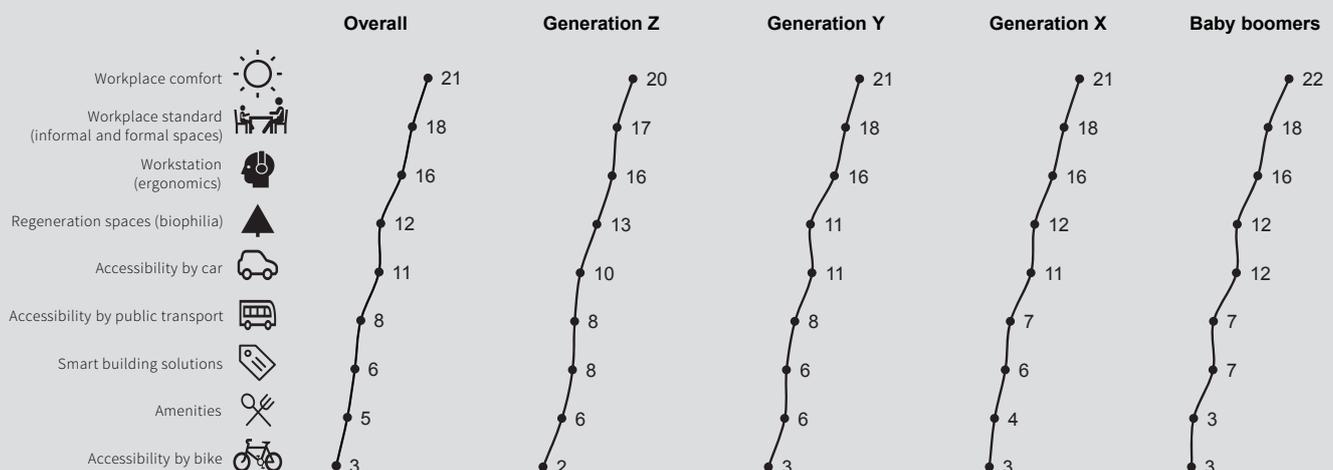
## Age is just a number!

This division seems quite comprehensive, but is it enough? Is age the only factor that describes a person? Or is it, in fact, just a number? Until recently the majority of companies thought that the generational model is complex enough and design was adjusted accordingly. Sometimes it worked, sometimes it did not. That is why we were sceptical about the power of that division and decided to dig a little deeper

and find out what truly differentiates office workers in Poland, and what their characteristics and expectations towards their workplace are. It turns out that there are no significant changes in office preferences, as it is confirmed by the conducted research.

The survey was carried out on 1,000 office workers in Poland (working for companies employing at least 100 people), which makes it a representative sample. It singled out five types of office workers, each characterised by a variety of features (described in details on following pages).

### What are the most important office elements for you? (%)



Source: JLL, Skanska | 2019

## Segmentation introduction



As already mentioned, office workers are not a homogenous group and they are characterised by a different set of office needs. Furthermore, age seems not to be the only factor describing us and our preferences. We are the product of our family obligations, environmental attitude, technological friendliness and many other aspects.

Based on a variety of factors, including generational criteria, five office worker types were identified. Interestingly, these types are applicable for the whole of Poland, be it a medium-sized city or the capital. Our office needs are quite universal across Poland, with the only major difference being attitudes towards commute time and transport mode preferences. Naturally, in bigger cities cars are less popular than public transport.

The types are:

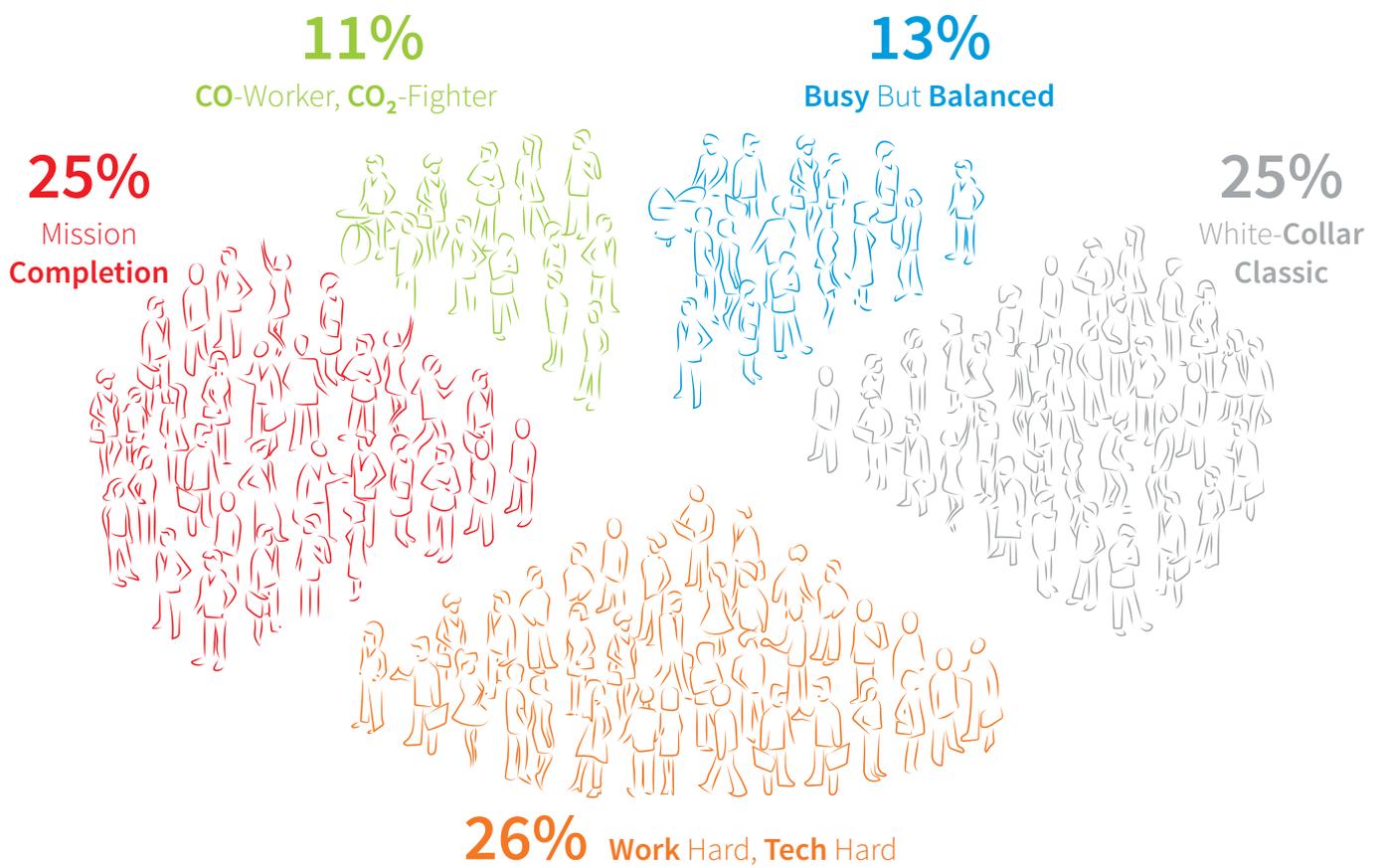
**CO-Worker, CO<sub>2</sub>-Fighter**

**Busy But Balanced**

White-**Collar Classic**

Mission **Completion**

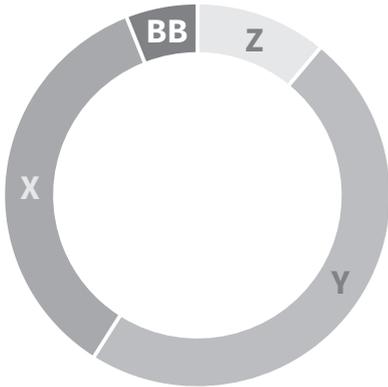
**Work Hard, Tech Hard**



Source: JLL, Skanska | 2019

# CO-Worker, CO<sub>2</sub>-Fighter

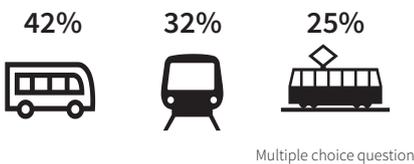
## GENERATIONS



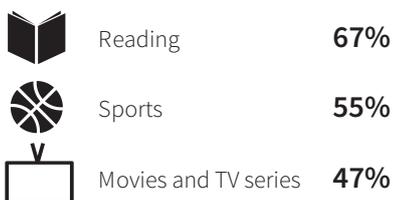
## POSITIONS



## COMMUTE TO WORK (TOP 3)



## SPARE TIME FAVOURITE ACTIVITIES



Source: JLL, Skanska | 2019



## Eco-friendly | Flexible | Open-minded | Collaborative | Trendy

The smallest but the most involved segment. Eco-freaks who care a great deal about green solutions in their offices, they would most likely choose public transport for commuting to work and are the least attached

surroundings. Biophilic design is made for them. They want to use a variety of alternative spaces in their workplace, creative rooms, chill-out zones and other informal spaces. Also, they are the most familiar with flexible space

to see those resolved both out of the office as well as in the premises. What is becoming more and more significant is commuting to work by bike, especially during warm weather.

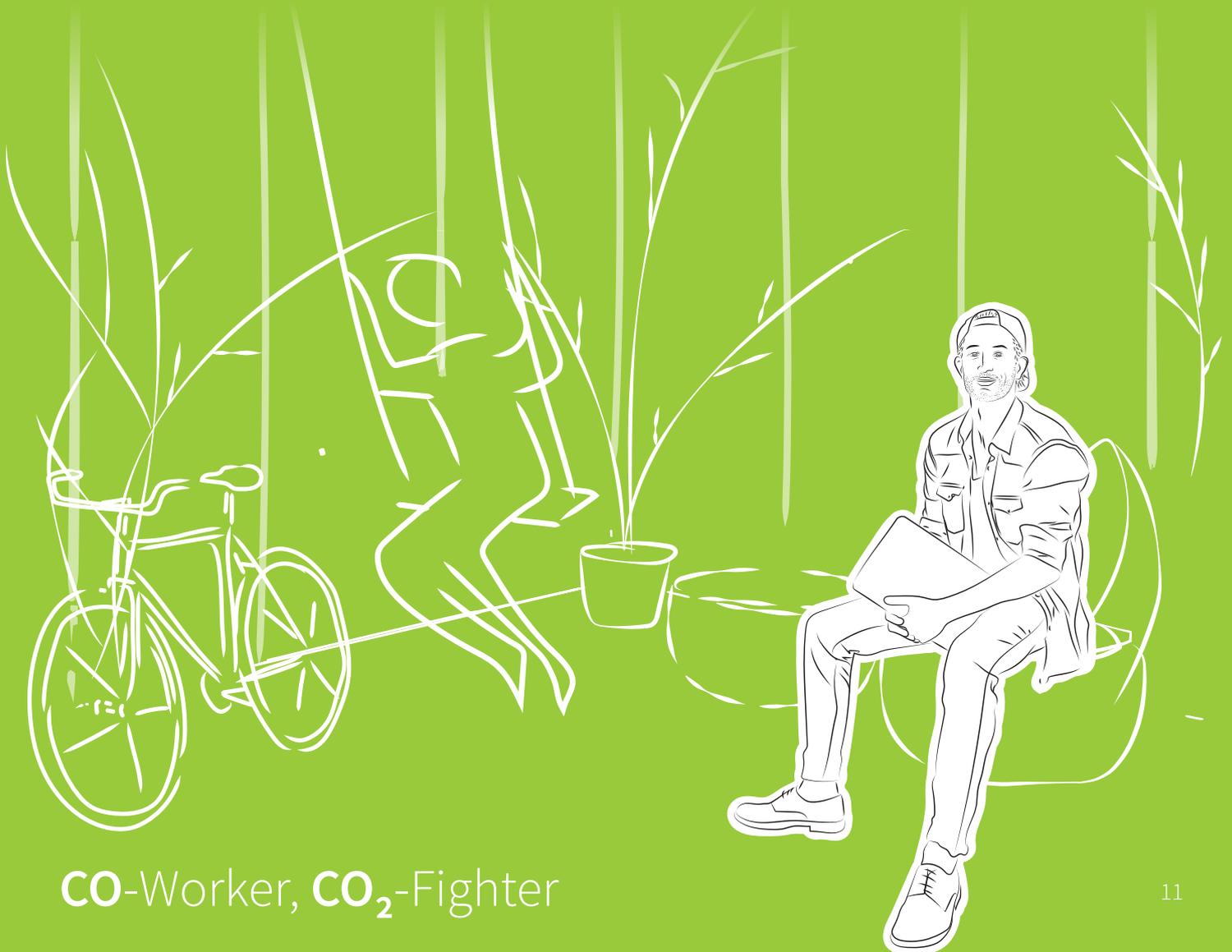
One of the reasons for that is the increasing popularity of city bike systems such as Veturilo in Warsaw, Wavelo in Kraków and WRM in Wrocław, as well as similar systems provided by office landlords or tenants. There are also other alternatives, such as CityBee, hive and Lime scooters.

An important feature of an office location for these people is access to a variety of amenities. They are most unlikely to bring their own food to work, so they least need a service base to be available to them.

## 50% **are aware** of co-working and flex solutions concepts

to their own desks. When asked about the advantages of hotdesking, they point out that it is a nice change of pace and good motivation to keep your workplace clean. Plants and other greenery are important for them both in office interiors and

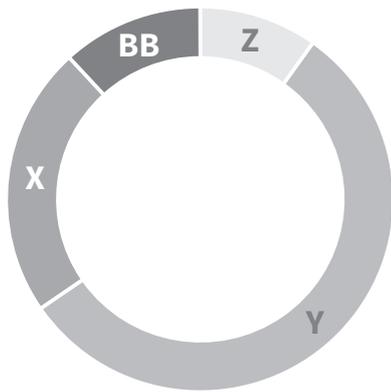
solutions and are more than willing to try those out. They feel they cannot focus well enough at home. They also say that they would like to be able to check the air quality in their offices. They are very up to date with the latest environmental issues and would like



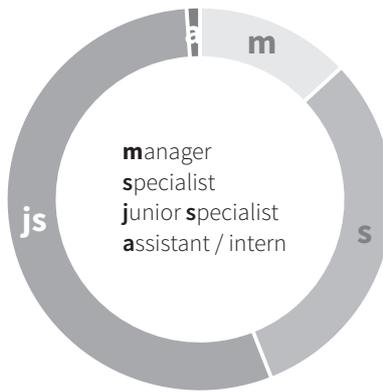
CO-Worker, CO<sub>2</sub>-Fighter

# Busy But Balanced

## GENERATIONS



## POSITIONS

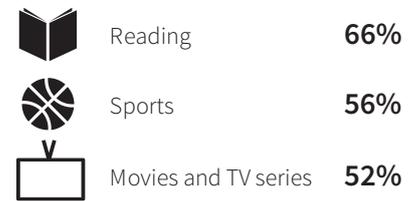


## COMMUTE TO WORK (TOP 3)



Multiple choice question

## SPARE TIME FAVOURITE ACTIVITIES



Source: JLL, Skanska | 2019



# Work-life balance | Well-organized | Responsible | Decisive | Empathic

This is the most female-driven of all the five types. Busy But Balanced know what they want and are not afraid to voice any concerns they may have regarding their office premises. Work-life balance is one of the key characteristics of this type. They need a clear set of rules that will allow efficient planning of both their work responsibilities as well as out-of-office life. A crucial factor for them in terms of the office is the location of the building. Not necessarily in the centre of the city, but with convenient public transport access (as they often come to work by public transport). They are quite attached to fixed working hours and their own, assigned desks. What is interesting is that they

are among the least concerned about the availability of greenery in the office from all the office types covered here. They are quite particular about the amenities offered by an office building.

solutions would make for an interesting alternative. They also point out that meeting new people is one of the biggest perks of hotdesking at work. In terms of tech solutions, they would like

## 60% **come** to work by bus

More often than others they would like to see a kindergarten available in their office surroundings. This is naturally a consequence of this segment having more children than others. Forty-five percent of respondents from this group feel distracted while working from home. This is where flexible office

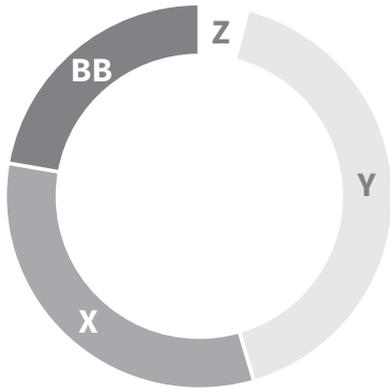
to be able to book office supplies (such as conference rooms) by app and optimise their commute with traffic control applications.



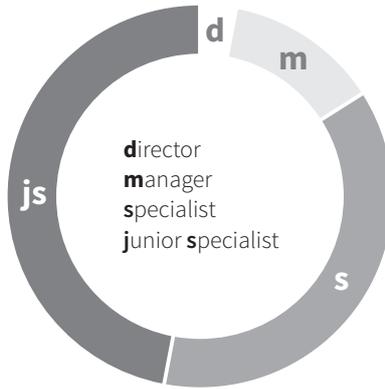
## Busy But Balanced

# White-Collar Classic

## GENERATIONS



## POSITIONS



## COMMUTE TO WORK (TOP 3)

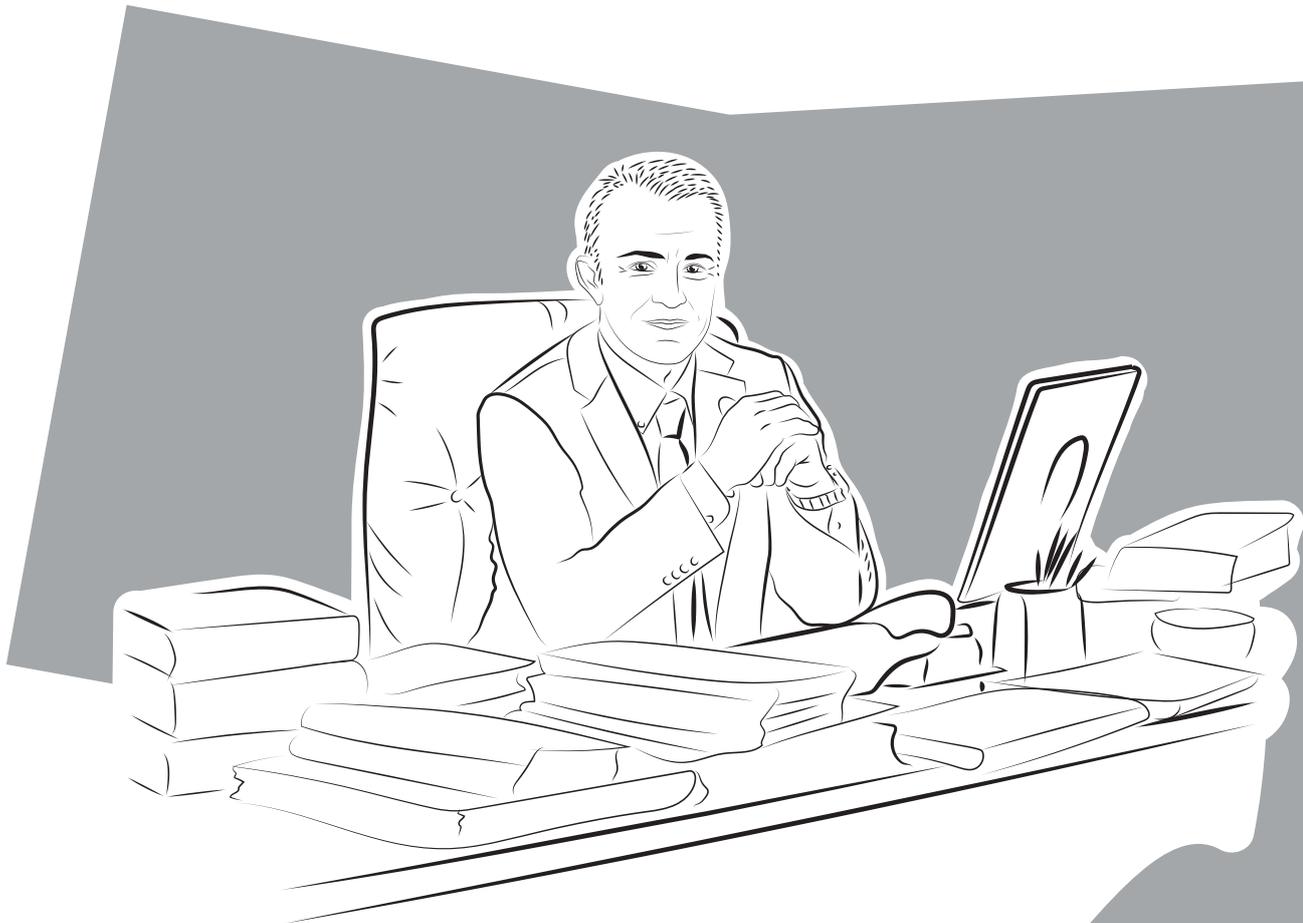


Multiple choice question

## SPARE TIME FAVOURITE ACTIVITIES



Source: JLL, Skanska | 2019



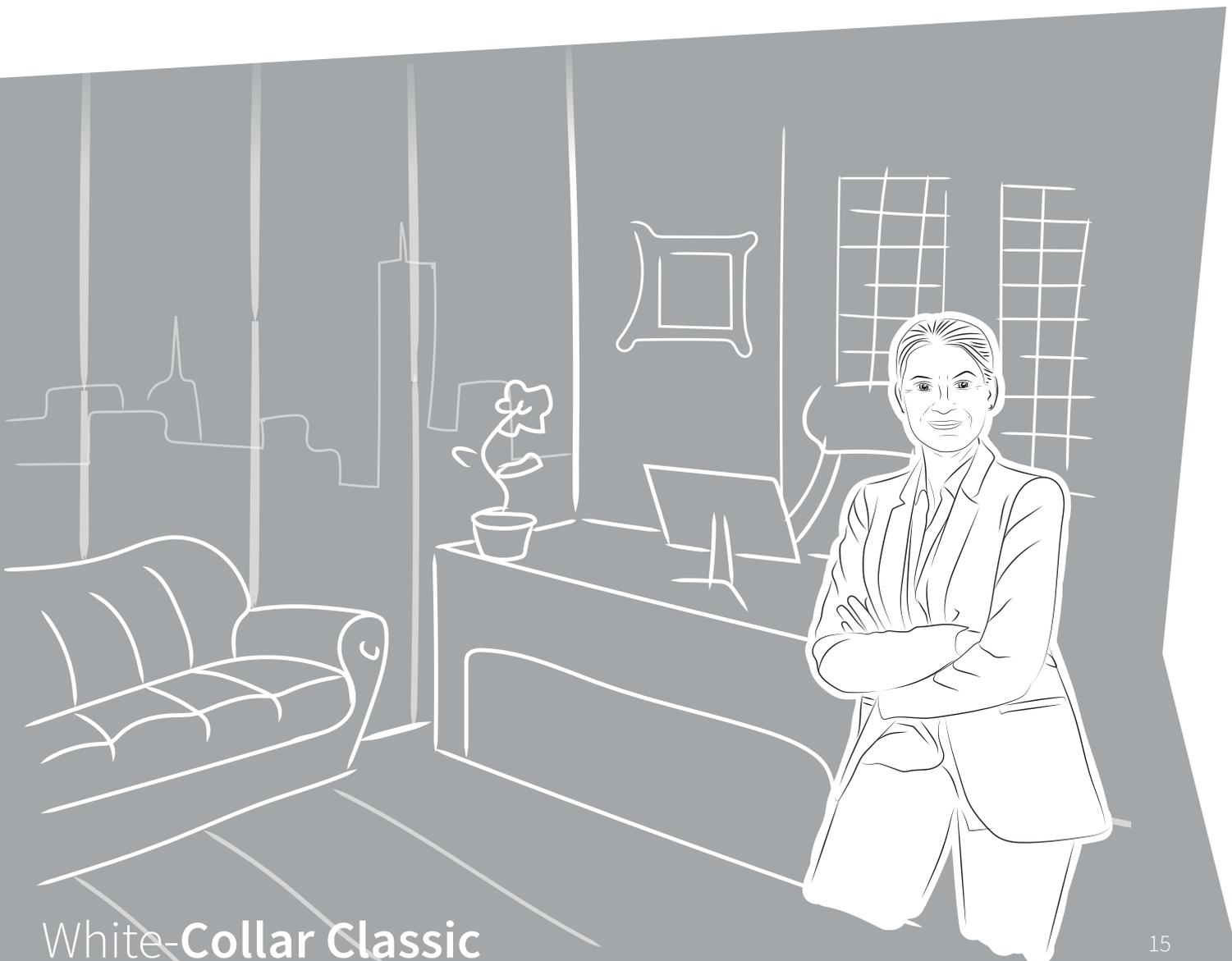
## Traditional | Experienced | Cooperative | Work-ethic | Reasonable

These are a quarter of the surveyed office workers and are the most traditional type. They care a great deal about having their own assigned desk and like to personalise their space. What is more, the ergonomics of their immediate surroundings is a crucial factor influencing their workplace satisfaction. They are very attached to the core, traditional characteristics of office premises. They are not huge fans of remote working and flexible hours. What derives from this is that their employers need to take extra care of the basic office features in order to meet the needs of White-Collar Classics. They spend a vast amount of time at their desks and therefore those need to be high quality.

### 92% get a sense of stability and security from work

Something White-Collar Classics also focus on is access to daylight and greenery in the office. They would like their office building to have tilting windows. They predominantly come to work by car, so availability of parking places near office buildings and the surrounding is an important factor for them. As a result, a central location of the building is quite unsuitable for them. Also important for White-Collar Classics is the daily co-operation with

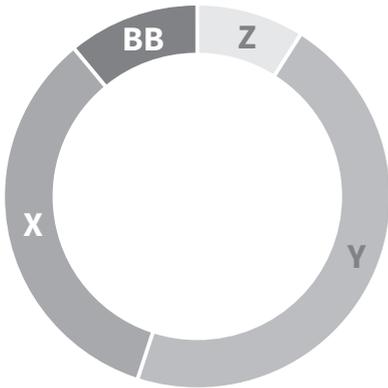
their co-workers. Human interactions are at the core of their work system and therefore they are quite reluctant to use remote working options. They are the segment most likely to bring their own food to work, so a nice, and large kitchen area is very beneficial for them; it would also enhance their social interactions at work, which are among their priorities.



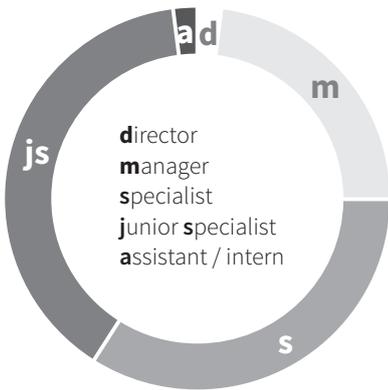
White-Collar Classic

# Work Hard, Tech Hard

## GENERATIONS



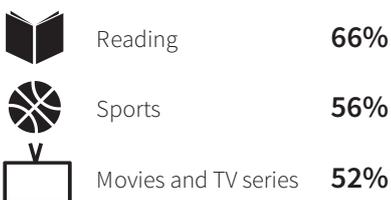
## POSITIONS



## COMMUTE TO WORK (TOP 3)



## SPARE TIME FAVOURITE ACTIVITIES



Source: JLL, Skanska | 2019



# Tech-savvy | Ambitious | Challenging | Influential | Sociable

This segment accounts for a quarter of the surveyed office workers. They are the most ambitious, tech-savvy and career-driven. They like their jobs to be diverse, challenging and requiring constant changes of pace. However, work is not their only thing. They also are very sociable and like to spend their spare time with other people. They are described as 'early adopters' and innovators, which means that they are more than willing to try new things and that also involves office premises. Sixty-seven percent of these respondents would like to work in flexible spaces, provided that they have access to all of the necessary technology. Modern office solutions, modern design and prestige

## 79% like to try new things

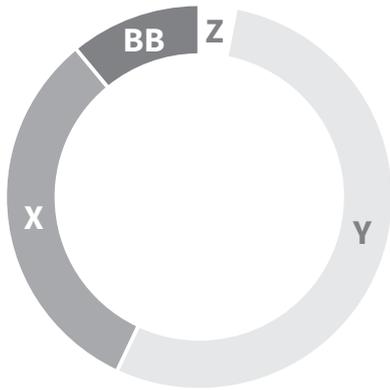
of a building are important for them, they are an integral part of their branding. They are successful, driven and they like that to be evident. They would like to see their office as diverse, with a variety of alternative spaces, both formal and informal. They see

a lot of advantages in hotdesking systems, such as efficient use of space, clean workspaces, opportunities to break their daily routines and mobility. On the other hand, they are in favour of working remotely, which saves a lot of time for them. After work they spend time with their friends, so the availability of bars, pubs and other service points are important features of their office surroundings. They would also like to take part in various events in the area, be those plays, films, food truck festivals or concerts. They often go to work by car.

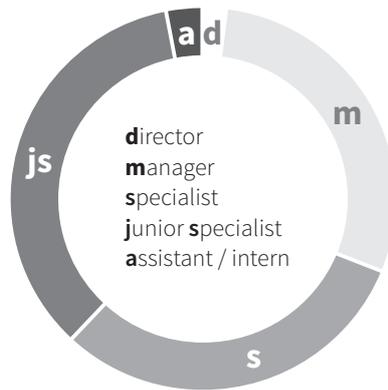


# Mission Completion

## GENERATIONS



## POSITIONS

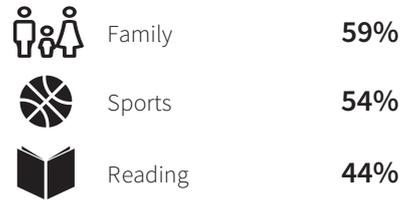


## COMMUTE TO WORK (TOP 3)



Multiple choice question

## SPARE TIME FAVOURITE ACTIVITIES



Source: JLL, Skanska | 2019



# Task-oriented | Reliable | Driven | Strong-minded | Active

This segment is all about efficiency. There is the highest share of upper management people in this group and that mindset is telling. They often come to work by car, so having a parking space in the building is a huge perk. They would also like to see parking optimising apps in their office buildings. For them design, modern solutions and the overall look of an office should derive from functionality and ability to do the job in an efficient manner. They are goal-oriented, active and on the move. Remote work options are an interesting alternative for them, be that home-office or other. They find commute time saving to be a very positive influence on their job. A key characteristic of the Mission

Completion type is their willingness to work flexible hours. One third of the respondents already do that, and further 40% would like to work in that way. Around 15% of Mission Completion have already worked in a hotdesking system and they feel that the efficient use of space is the major advantage of this solution.

During warm weather they tend to switch their work commute to bike, almost to the level of the CO-Worker, CO<sub>2</sub>-Fighter type. Chill-out zones are not a top priority for them. They often have families, so kindergartens in the office surroundings are a big value added. What also differentiates this personality type is their dress code

at work. As a consequence of being ambitious and successful at work, they often describe themselves as smartly dressed.

## 73% work or would like to work **flexible hours**



Mission **Completion**

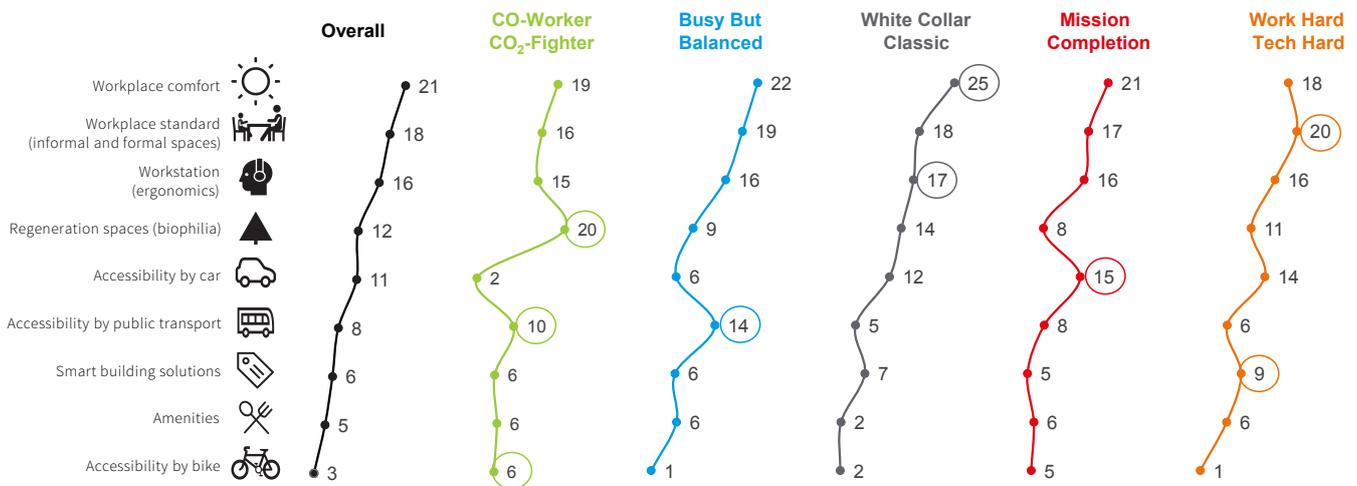
# Segments summary – what does it mean?

Looking at employees through their age can be helpful; however, as the survey showed, it is not enough. It is absolutely essential to look at employees’ preferences and lifestyles, because that is what truly differentiates us. It is crucial to really get to know given companies’ employees, not only by their age, and only then create an office design. The office personalities covered in this report can help to structure that knowledge and be a nice starting point to a discussion on workplace. We need to remember that in order to create successful and human-centric office, we have to focus on making places, not empty spaces.

Our approach is to engage employees from the earliest possible moment and design an experience for them through physical, emotional and digital dimensions of the space. Thanks to that we are able to build a community around the office and, as a result, create spaces with meaning. Given such an attitude towards office design, we may create a bond between people and the space, instead of just randomly placing desks and sofas, together with some greenery. Sense of belonging is something that we should strive for.

We are observing a positive and major shift in terms of teams that create new workplace arrangements. It is no longer a team of office managers but a cross functional collective with different perspectives, experience and attitude to workplace. Indeed, combining office administration, Facility teams, HR, IT and Finance with business perspective is a great start. But only including employee perspective to all that creates an engaging, empowering and fulfilling experience .

## What are the most important office elements for you? (%)



Source: JLL, Skanska | 2019

## What is a **future-proof** office?

A future-proof office is a space where people work efficiently and where they will continue to do so. It is not just about packing the premises with as many tech solutions as possible. **It is about a deep understanding who are you working with.**

Such deep knowledge of how the office should be designed comes from a three-stage process, researched through comprehensive study and developed in JLL Metrics that Matter model.



### The business excellence stage

This stage creates the foundation for futureproof office: it is all about efficiency. It is about looking at your operational costs, your IT efficiency (IT-related infrastructure) and workplace metrics. These are the essentials that need to be thoroughly examined before taking the next step.



### The human experience stage

This stage fosters the employee comfort and human-related aspects of the office. First part of it is about engagement. It is about talent attraction and retention, it is about collaborative work and flexible working. Based on engagement, community building process starts. People need informal interactions, social spaces and a sense of belonging, underpinned by well-being and happiness in the office.



### The future-proofing stage

The last stage binds it all together. The final touch is combining that sense of well-being with innovation culture. It involves process and business models digitalization merged with innovation. It is about tech, creativity, as well as introducing agile methodologies in terms of adopting all new ideas.

On the next pages we will present office aspects that should be considered while thinking about future-proofing any office. These include desk-sharing, office-related apps and remote working options. All of that will be concluded with the workplace evolution in time and our forecasts for 2029.

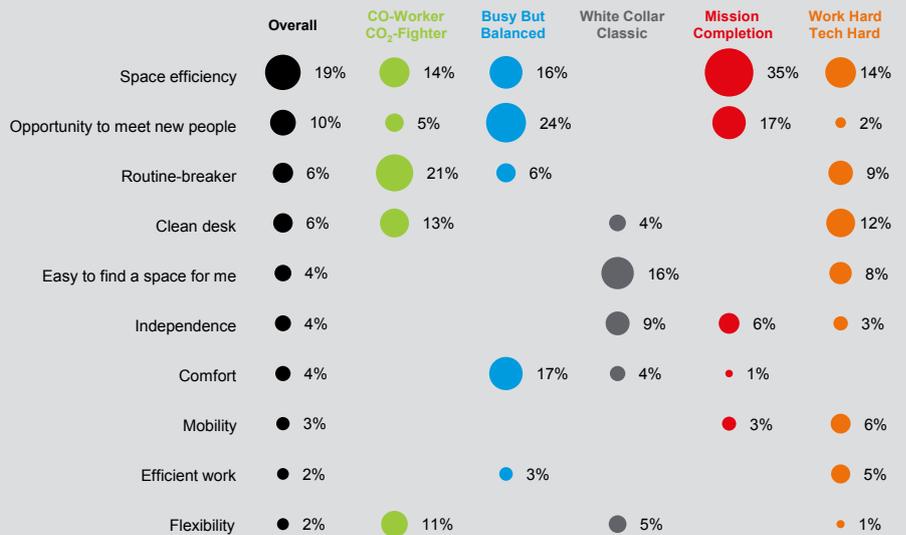
That's the basic recipe. But when does it work? It only works when a company **knows its employees.**



# What are **your attitudes** towards free-sitting concepts?

Desk-sharing is still unknown for office workers in Poland, as only 15% of the respondents experienced working in such system. It is interesting how the way of thinking about office shifts when somebody starts sharing a desk. An assigned desk loses its importance and the focus is put on alternative spaces, such as creative zones, silent rooms, informal spaces and chill-out zones. This proves that the possible initial resistance against desk-sharing system evolves over time.

## What are major advantages of desk-sharing for you? (%)



Source: JLL, Skanska | 2019

# Which **office features** would you like to see in your company?

CO-Worker, CO2-Fighter	Busy But Balanced	White Collar Classic	WorkHard, Tech Hard	Mission Completion
Air-conditioning and light regulating apps	Mobile meeting room booking system	Air-conditioning and light regulating apps	Parking booking apps	Air-conditioning and light regulating apps
Air-quality measuring app	Window shading	Window shading	Mobile meeting room booking system	Window shading
Window shading	Find my colleague app	Parking booking apps	Window shading	Traffic control apps
QR codes as guests registration	Traffic control apps	Community building apps	Air-conditioning and light regulating apps	Air-quality measuring app
Live rating apps for building services	Air-conditioning and light regulating apps		Access control app	Access control app

Ranked from the most important for a given segment



Up to 73% of the respondents already work or would like to work flexible hours. This number concerns Mission Completion type, who often combine business life with family. Another perk and alternative to a typical 9 to 5 is working away from the office. There are some challenges connected to that, as working from home can be distracting or there can be an insufficient IT infrastructure. However, these obstacles are usually removed by flexible office solutions, which are an interesting



# What are the benefits of remote working?

alternative and the hottest trend on the office market in Poland. Home office or flex spaces are a major benefit for office employees; however, even as such, they need to be introduced through change management and cultural transformation process in order to be implemented effectively.

## What are disadvantages of remote working for you? (%)

	Overall	CO-Worker CO <sub>2</sub> -Fighter	Busy But Balanced	White Collar Classic	Mission Completion	Work Hard Tech Hard
No access to work colleagues	35%	12%	34%	63%	14%	18%
No access to required technological solutions	33%	30%	26%	16%	52%	55%
Working home is distracting	28%	45%	45%	20%	21%	24%
Hard to separate work and after-hours life	24%	26%	19%	31%	22%	16%
Working remotely is badly perceived by my employer	10%	11%	13%	6%	20%	1%
Working remotely is badly perceived by my coworkers	3%		5%	1%		15%
I do not have sufficient space to work at home	3%	10%	6%	1%		4%
Other	5%	10%	7%	3%	5%	4%

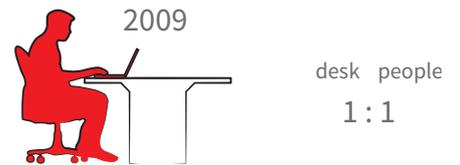
Source: JLL, Skanska | 2019

Office market and workplace attitudes are constantly evolving. The market now looks very different than 10 years ago and the pace of change is accelerating. There is a trend of reducing space per person in the office in favour of informal and social areas. In the past social part typically involved small kitchen area with a microwave and few tables, which resulted in limited functionality of such space. Currently these areas are much larger and cater to various needs of modern employees.

## Workplace in the year...

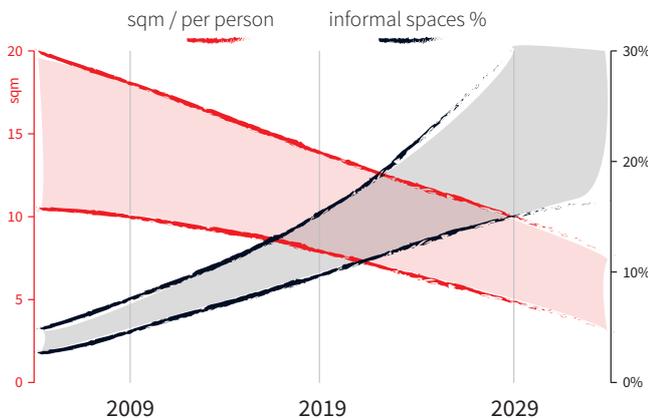
These are places to eat lunch, to socialize with other employees, places for exchange of ideas and discussing any work-related issues, places for cooperation, focused work and inspiration. We forecast that up to 30% of office space may be allocated to such uses in 10 years time. Also, the number of desk is decreasing. As the availability of alternative spaces is growing, the need for assigned desk for each employee becomes redundant. Moreover, companies are increasingly looking into flexible office solutions, which allow for more agile approach to office space needs. Furthermore, as the way we work is changing quickly, office design needs to reflect that and respond to our requirements. In the past offices were designed to last even up to 15 years, while now we expect the premises to grow and adapt to our work quicker. This trend will only accelerate in the future. The change is now and modern offices need to keep up with it.

Desk sharing evolution

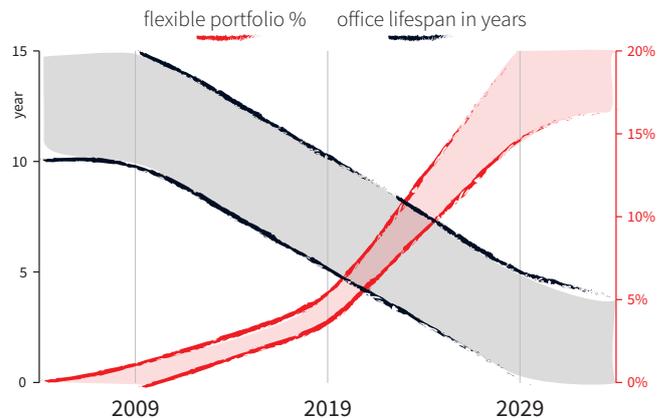


Source: JLL, Skanska | 2019

Space per person vs social and informal spaces 2009-2029



Office lifespan vs flexible portfolio solution 2009-2029



Source: JLL, Skanska | 2019



**Anna Marciniak**  
HR & Administration Director at  
Skanska office unit in Poland

**CO-Worker, CO<sub>2</sub>-Fighter**

“

Designing an office may seem like a pretty straightforward deal, but as it turns out, it really isn't. A variety of factors and a number of people need to be involved in order to make it work.

However, it boils down and starts with one crucial component: get to know people working in your company. Find out who your employees are and tailor office space to their needs. Appreciate diversity of your team and include its members. Make your office as a kind of reflection of their needs. Respect what kind of job they do. Make them feel embraced by their workplace and work among happy people.

”

## Summary

“

Offices should encourage interaction and increase our productivity, they should help us with our daily responsibilities. Whether we are a CO-Worker, CO<sub>2</sub>-Fighter, a White-Collar Classic, Busy But Balanced, Work Hard, Tech Hard or Mission Completion, office premises should meet most of our needs.

With increasing competition for best talent, offices become important marketing tools, which significantly contribute to recruiting best people and we'd like to be in the forefront of that change.

We firmly believe that this report is a great starting point to make better any office and any company. We are more than happy to have been a part of it and we look forward to working on improving the quality of offices in Poland.

”



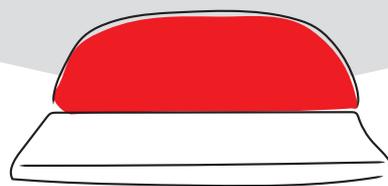
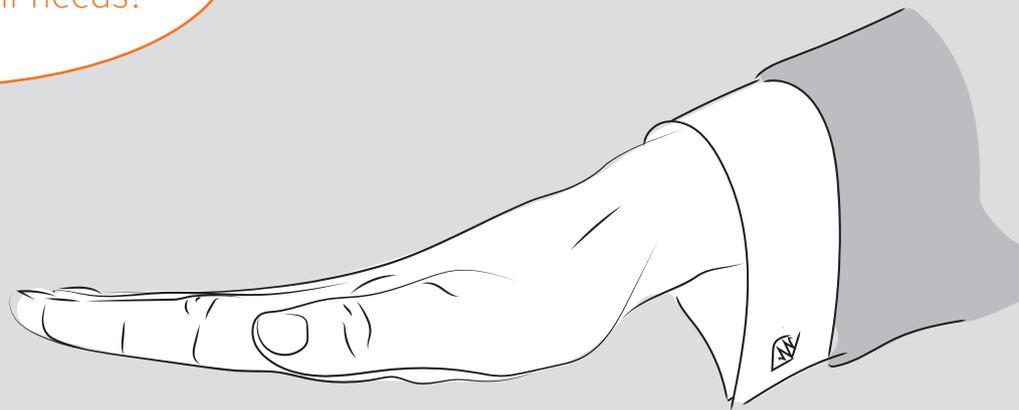
**Anna Bartoszewicz-Wnuk**  
Head of Workplace Advisory, JLL

**Mission Completion**

Do you wonder which  
**personalities**  
are working in your company?

Are you interested in  
**segmentation**  
of your employees?

Would you like to know  
**how to adjust**  
your office to their needs?



**Contact us!**



**SKANSKA**

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