

RESULTS REPORT

DREES &
SOMMER

ASKING QUESTIONS:
THE BEST WAY
TO FIND OUT
WHAT PEOPLE
REALLY THINK BY SOME
DISTANCE

.



CORONAVIRUS & BEYOND

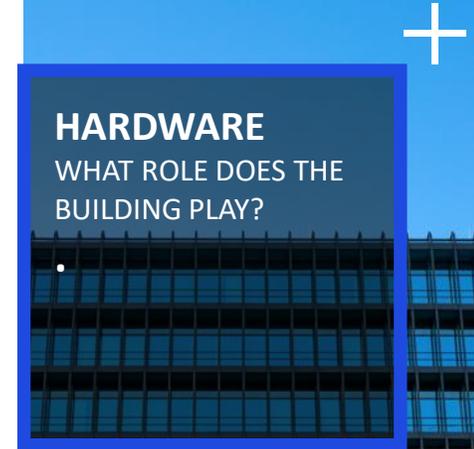
NOW IS BY SOME DISTANCE THE BEST TIME TO MAKE A LASTING CHANGE

WHAT ROLE WILL THE OFFICE PLAY IN THE FUTURE?

WHAT DO WE NEED TO DO?

HOW CAN WE ENSURE PRODUCTIVE AND INNOVATIVE CO-WORKING?

HOW CAN WE PRESERVE SOCIAL AND EMOTIONAL CONNECTION?



EMPLOYEE SURVEY AT DREES & SOMMER

CORONAVIRUS & BEYOND

JUL-SEPT
2020

- Approx. **1,500** of around 4,000 workers
- Equal split between women and men
- Around **90%** were **working full-time** on a regular **31-40 hours per week**
- Around two thirds of respondents were working in **front-office jobs**
- 39% were aged **28-37** and 25% were **38-47 years old**



SUMMARY

PULSE CHECK

CORONAVIRUS IMPACT

41%

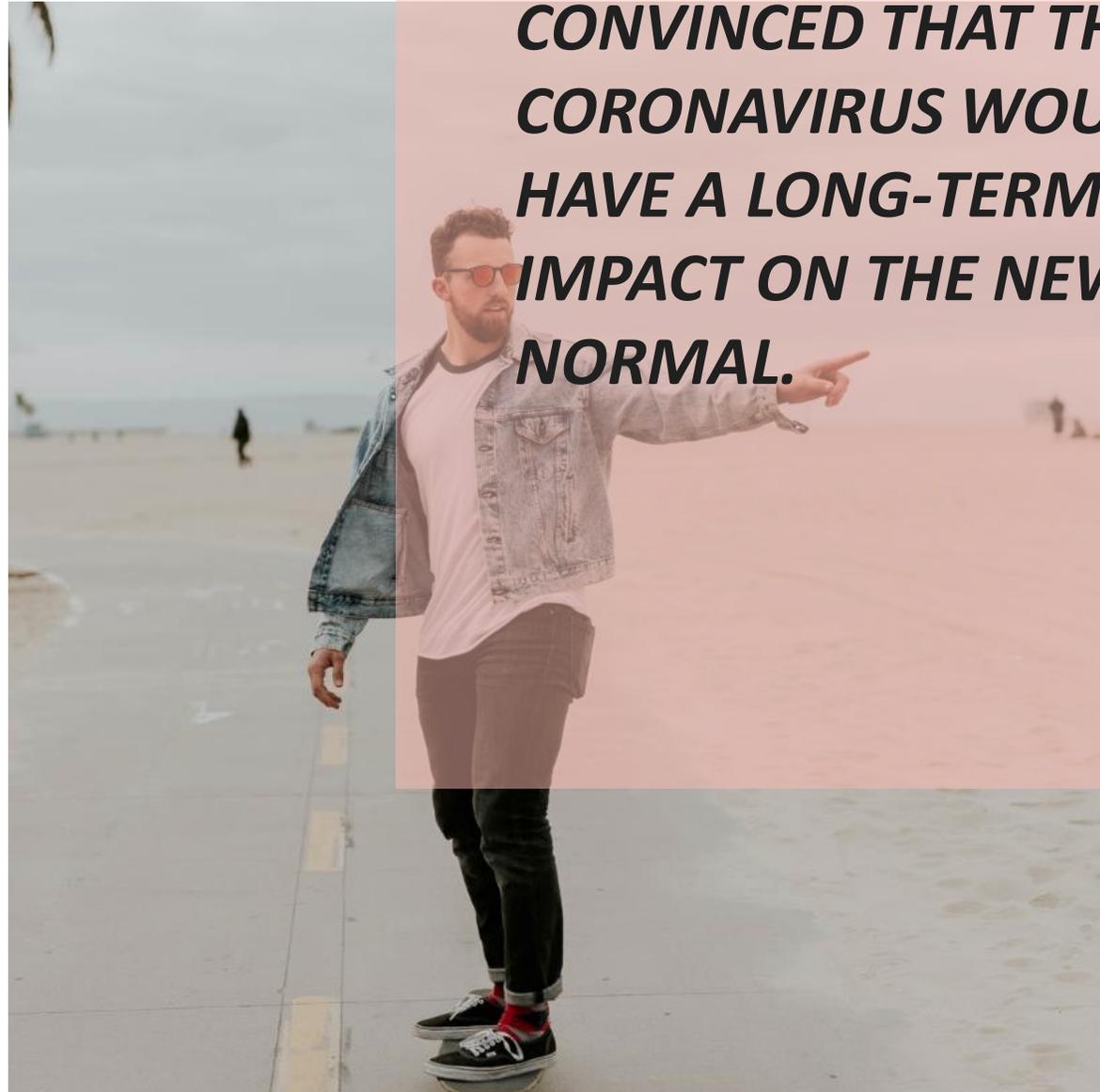
predict **medium-term** effects lasting 2 to 3 years

52%

predict **long-term** effects

...7% thought that everything would return to normal at the end of the year.

— ***MORE THAN HALF WERE CONVINCED THAT THE CORONAVIRUS WOULD HAVE A LONG-TERM IMPACT ON THE NEW NORMAL.***



SUMMARY

PULSE CHECK

DIFFERENT LIFE PRIORITIES



52% put private life and family life in first place,



29% chose career, and



22% chose health and fitness.

– AFTER A PRIVATE LIFE AND FAMILY LIFE, CAREER AND WELL-BEING ARE PRACTICALLY JOINT SECOND PLACE IN PEOPLE'S LIFE PRIORITIES.



SUMMARY

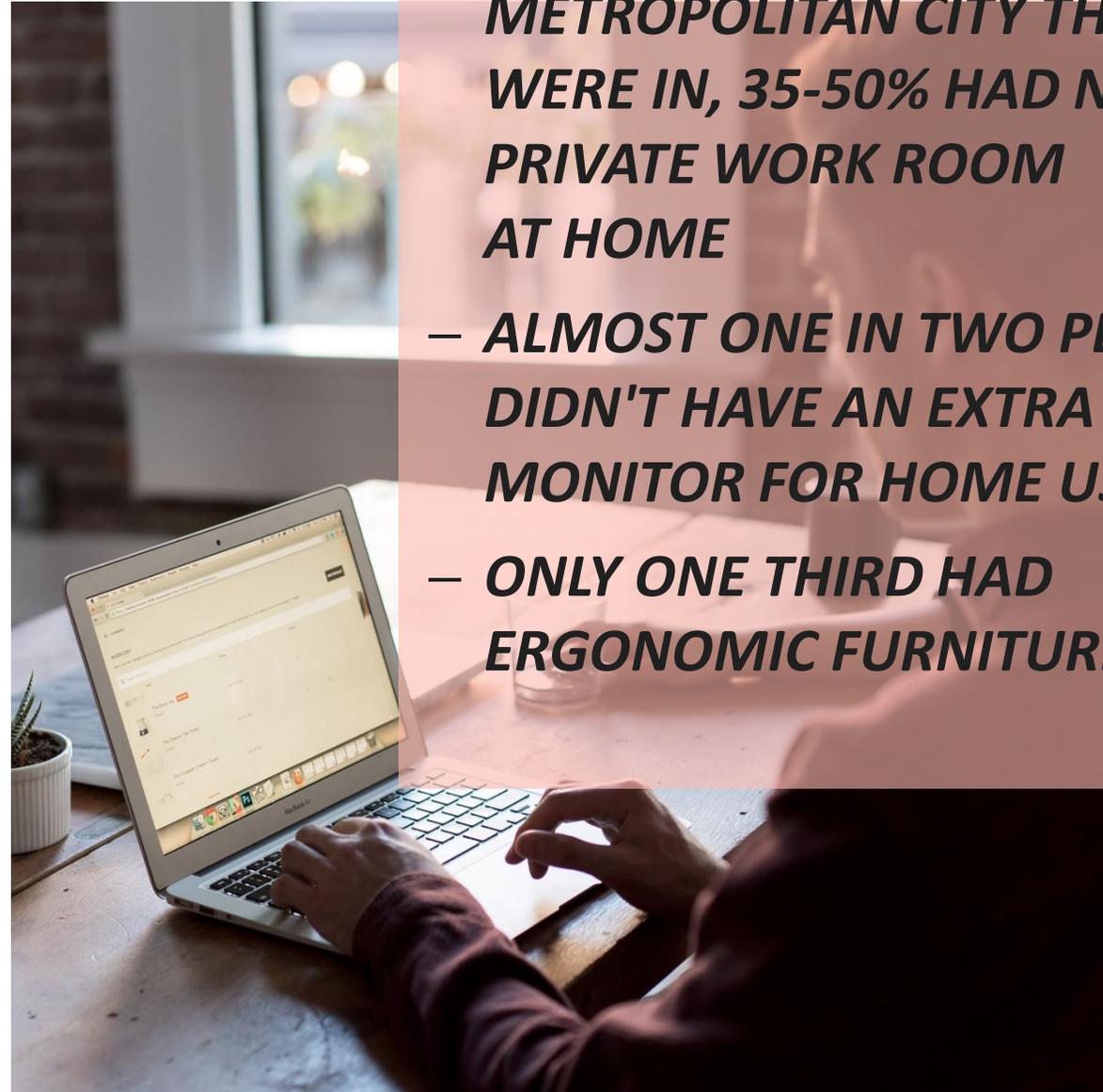
WORK AT HOME

HOW DOES WORKING FROM HOME WORK?

65% have their own/a separate work room at home •

The home office

- 85% have an adequate Internet connection.
- 58% don't have an extra monitor at home.
- 35% have an ergonomic chair.
- Only 5% have a height-adjustable table.



- **DEPENDING ON WHICH METROPOLITAN CITY THEY WERE IN, 35-50% HAD NO PRIVATE WORK ROOM AT HOME**
- **ALMOST ONE IN TWO PEOPLE DIDN'T HAVE AN EXTRA MONITOR FOR HOME USE**
- **ONLY ONE THIRD HAD ERGONOMIC FURNITURE**

SUMMARY

MOBILE WORKING

PRE-CORONAVIRUS RATES

40% had never tried mobile working,

45% occasionally,

15% regularly

For those who had tried mobile working before the coronavirus,...

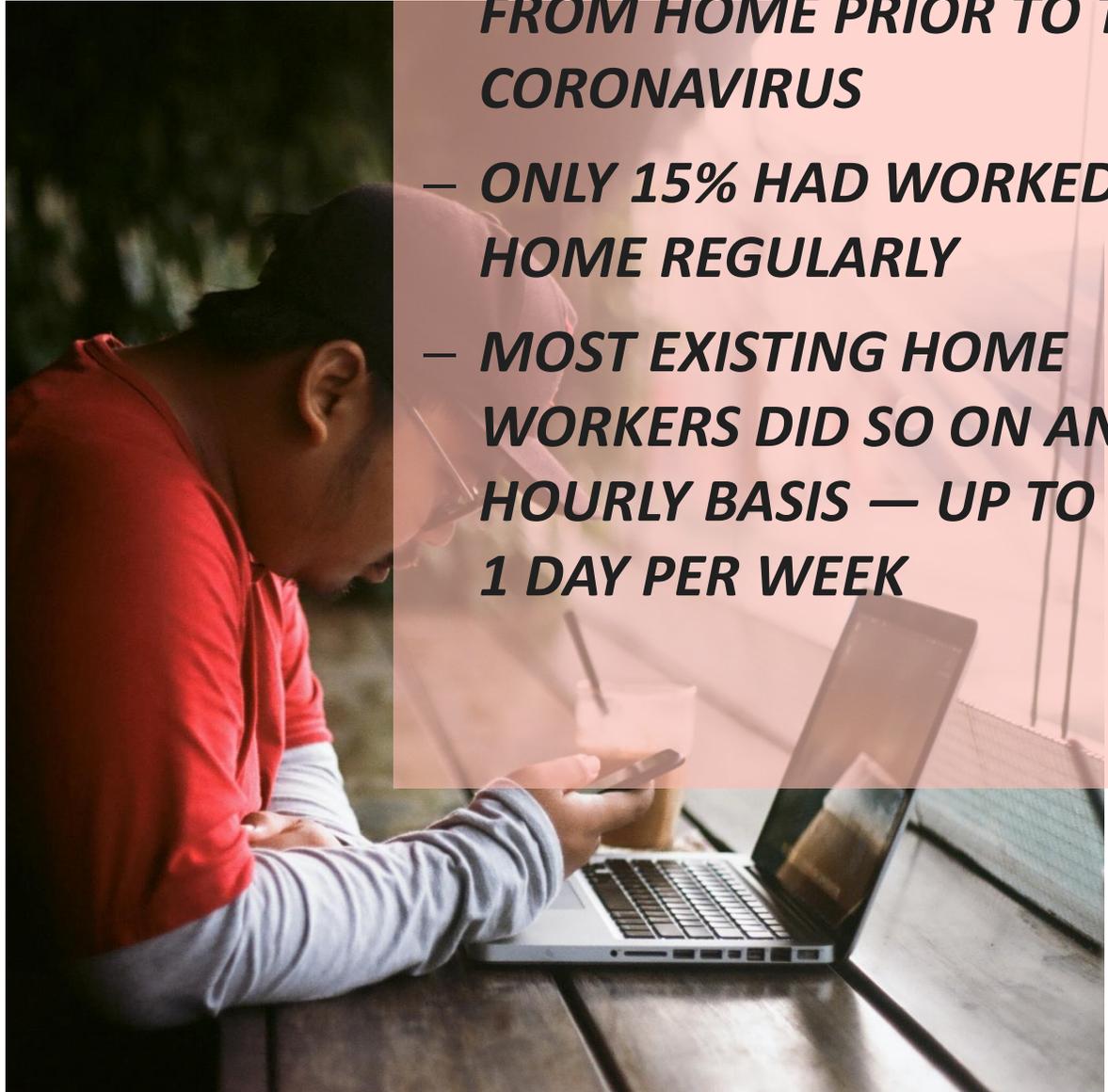
...it was mostly hourly (58%),

1 day per week for one third of people (30%),

2 days per week (6%),

and for the rest (6%), regularly for 3-5 days per week.

- **40% HAD NEVER WORKED FROM HOME PRIOR TO THE CORONAVIRUS**
- **ONLY 15% HAD WORKED FROM HOME REGULARLY**
- **MOST EXISTING HOME WORKERS DID SO ON AN HOURLY BASIS — UP TO MAX. 1 DAY PER WEEK**



SUMMARY

CURRENT WORK LOCATION

AS OF TODAY
(SURVEY ON STATUS QUO)

61%

...ARE WORKING IN A
PROJECT OFFICE OR
DREES & SOMMER
OFFICE

37%

...ARE WORKING FROM
HOME

2%

...ARE WORKING FROM
ALTERNATIVE PLACES

- **ONE IN TWO PEOPLE ARE BACK IN THE OFFICE**
- **ONE IN THREE ARE WORKING FROM HOME***
- **ALMOST NOBODY IS IN ALTERNATIVE PLACES****

**APART FROM IN AMSTERDAM, WHERE WORKING FROM HOME IS SO WELL ESTABLISHED THAT 70% OF RESPONDENTS SAID THEY WERE REGULARLY DOING MOBILE WORKING*

***APART FROM IN BERLIN WHERE 10% OF PEOPLE HAVE FOUND ALTERNATIVE PLACES TO WORK FROM*



SUMMARY

MOBILE WORKING

FUTURE USAGE

Proportion of mobile work **in the future:**

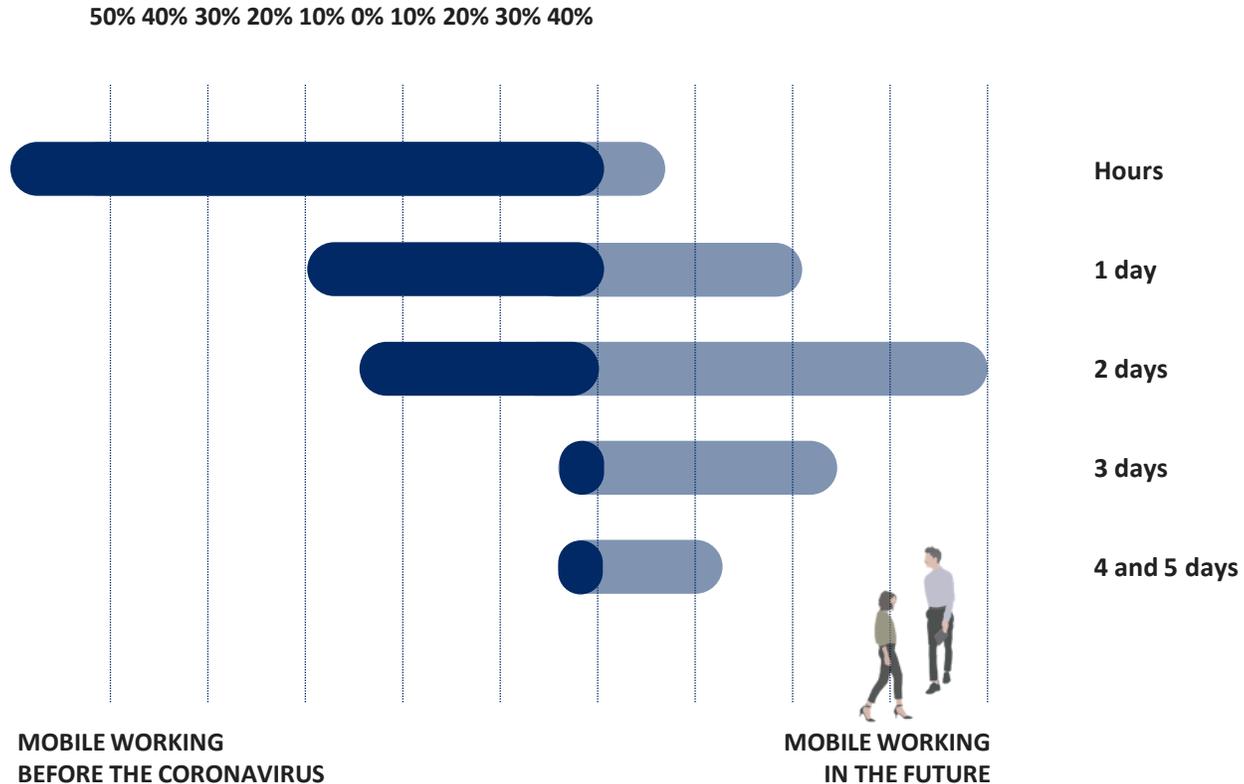
- **85%** said that the proportion will rise, **11%** didn't expect any (or scarcely any) change **3%** thought that the proportion would fall.
- Amount of mobile working in the future:
2 days per week **40%**,
3 days per week **22%**,
1 day per week **20%**,
4 days per week **7%** and 5 days per week **4%**.
- **In the future**, our workers thought **the following activities** could be done whilst working from mobile locations:
 - **83%** concentrated solo work,
78% email correspondence,
71% scheduled phone/video calls;
Only **40%** team meetings and
31% internal project meetings

- **85% WOULD LIKE MORE FLEXIBLE WORK ARRANGEMENTS**
- **WILLINGNESS TO DO MOBILE WORKING IS SIGNIFICANTLY INCREASING**
- **A MAJORITY OF RESPONDENTS THOUGHT THAT CONCENTRATED WORK, CORRESPONDENCE, AND SCHEDULED PHONE CALLS WERE SUITABLE ACTIVITIES FOR MOBILE WORKING**
- **THEY WERE FAR MORE SKEPTICAL ABOUT COLLABORATIVE WORKING**



SUMMARY

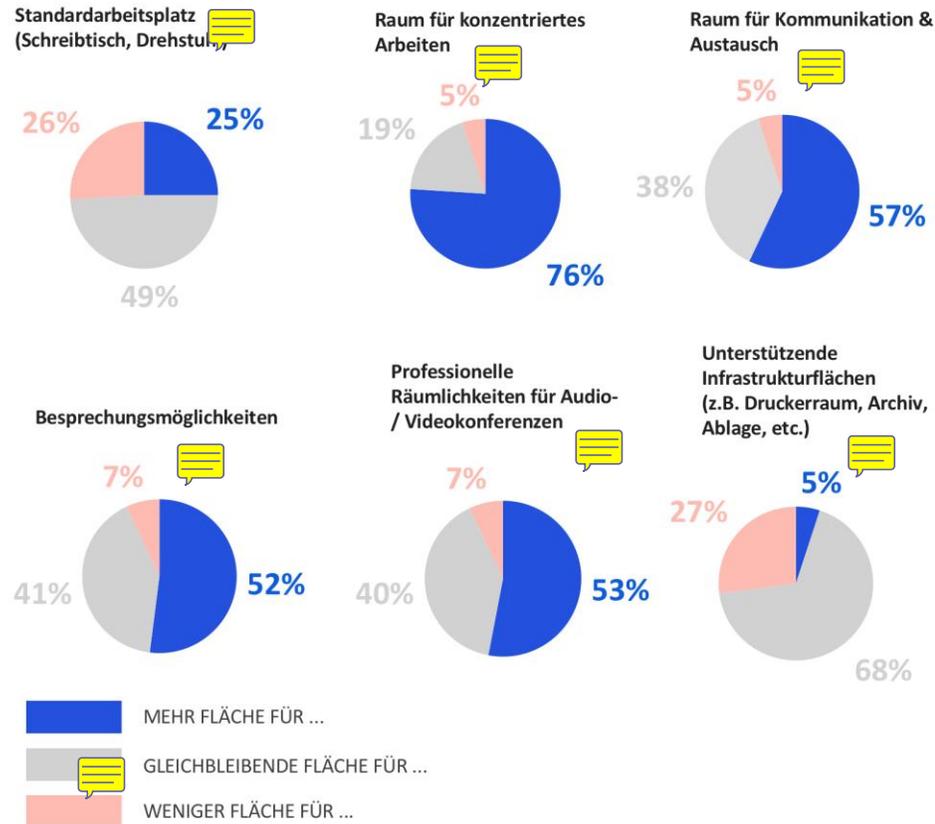
MOBILE WORKING - SUMMARY



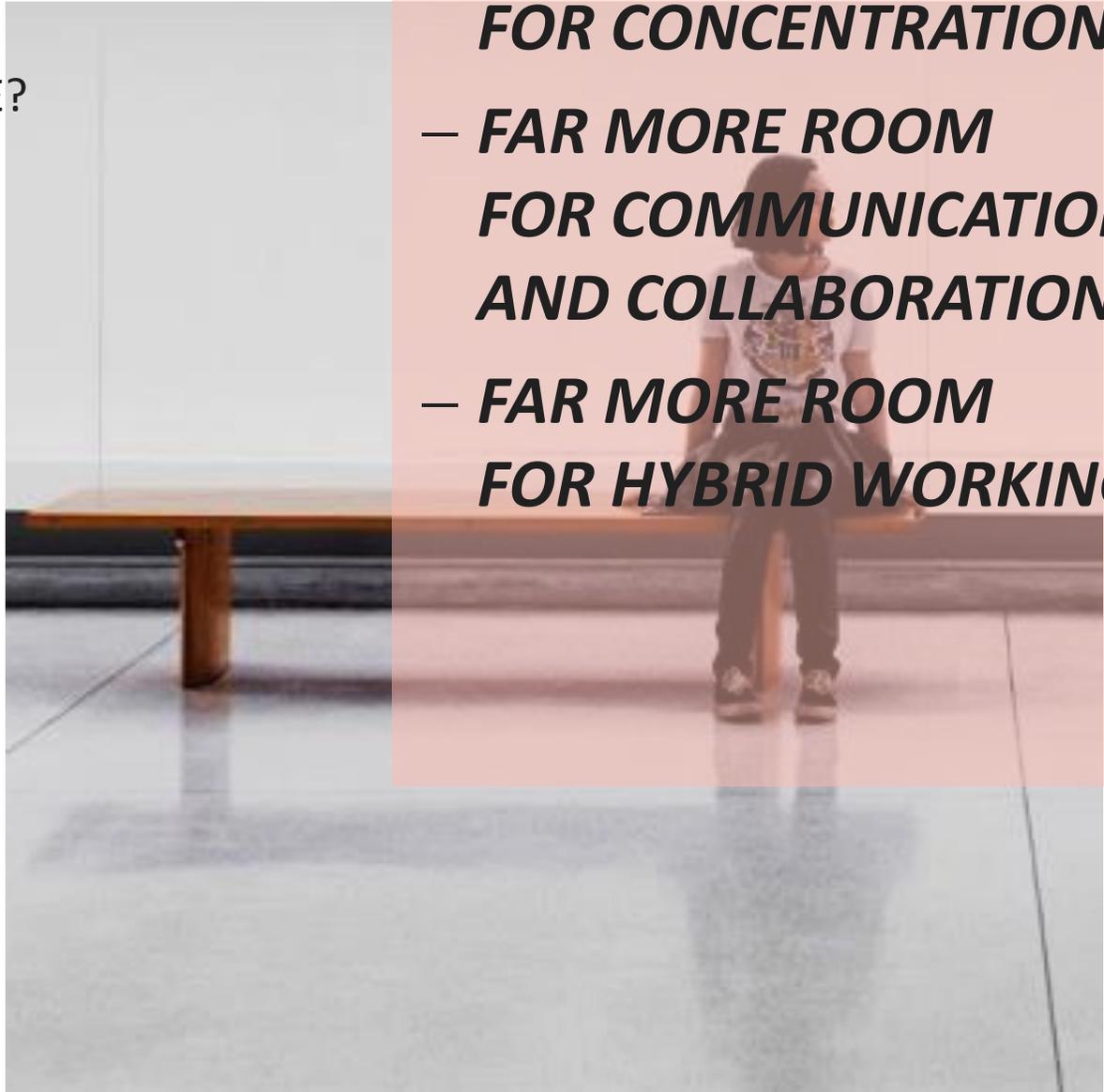
– A MASSIVE CHANGE IN ATTITUDES REGARDING THE AMOUNT OF MOBILE WORKING: WHEREAS BEFORE THE CORONAVIRUS PEOPLE WOULD DO MOBILE WORK MAX. 1 DAY PER WEEK, AFTERWARDS THE MAJORITY WOULD DO 1 TO 3 DAYS OF MOBILE WORK PER WEEK.

SUMMARY

HOW WILL SPACES BE UTILIZED IN THE FUTURE?



- FAR MORE ROOM FOR CONCENTRATION
- FAR MORE ROOM FOR COMMUNICATION AND COLLABORATION
- FAR MORE ROOM FOR HYBRID WORKING



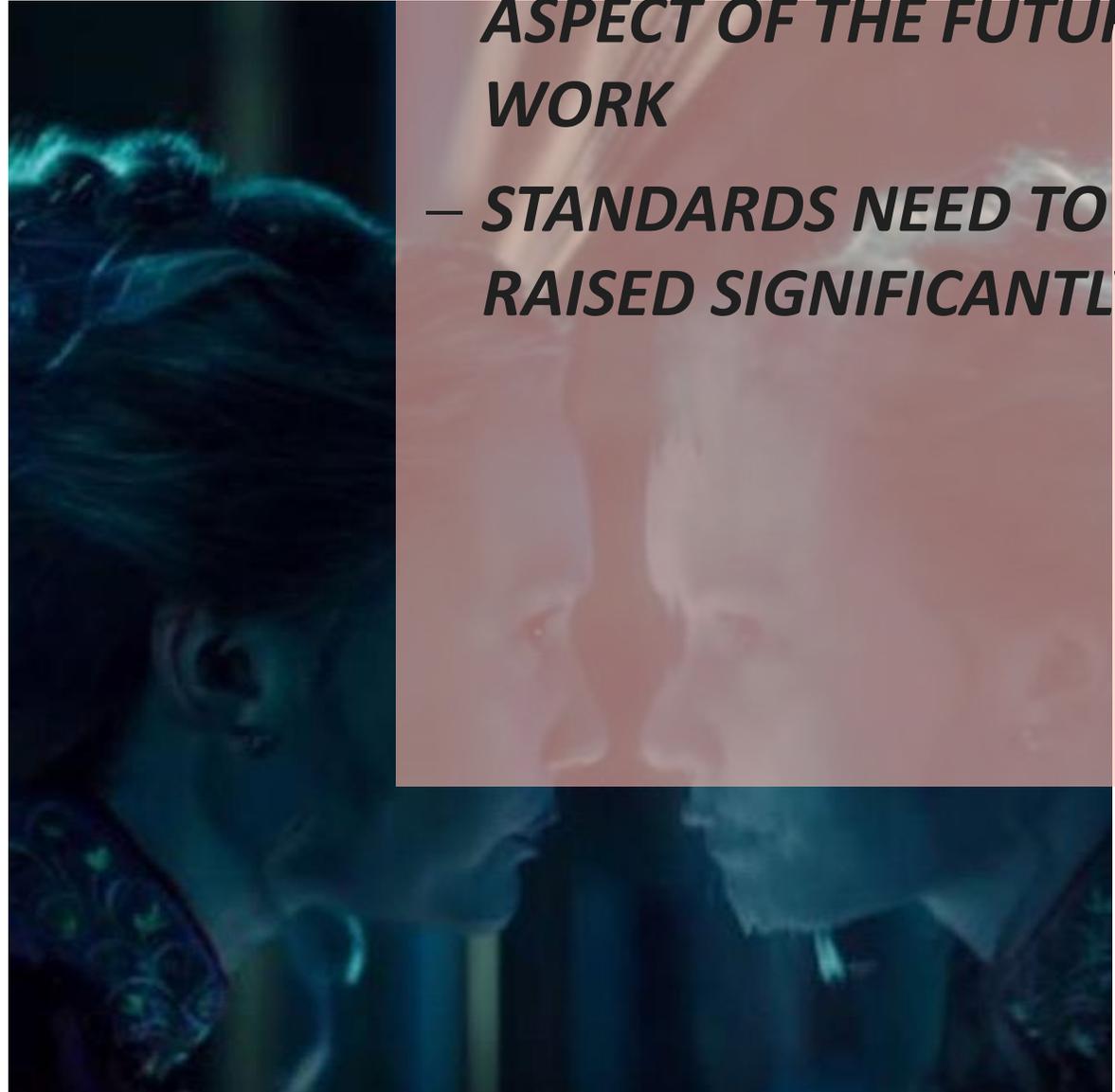
SUMMARY

IT AND MEDIA TECHNOLOGY

UPDATING IT EQUIPMENT AND MULTIMEDIA TECHNOLOGY

39% cited smartboards,
36% videoconferencing technology,
28% monitors,
24% cellphones,
24% presentation equipment (projectors, monitors etc.),
only 12% mentioned landlines.

- ***HYBRID WORKING IS A KEY ASPECT OF THE FUTURE OF WORK***
- ***STANDARDS NEED TO BE RAISED SIGNIFICANTLY***

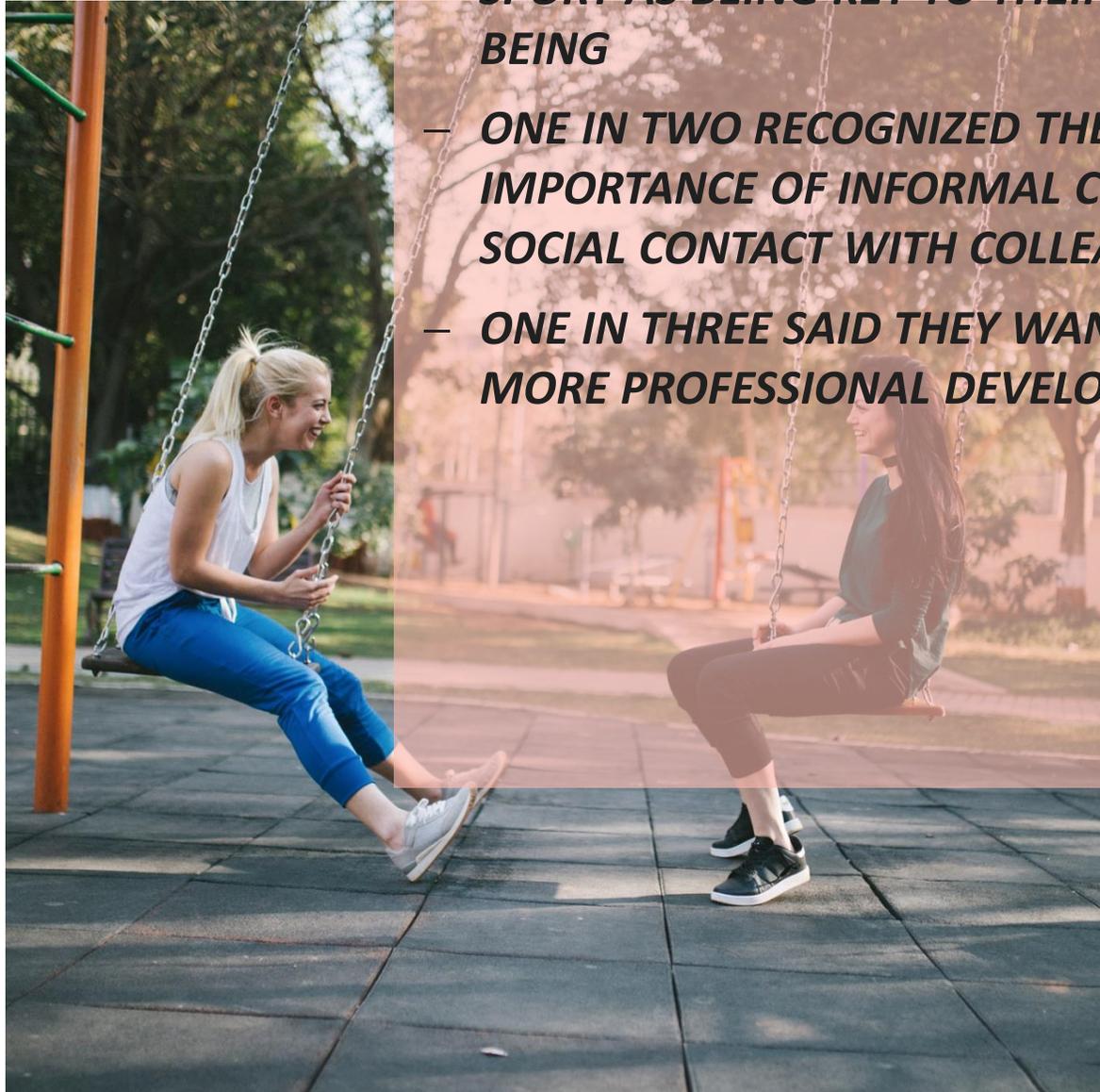


SUMMARY

TEAMWORK AND WELL-BEING

ASPECTS OF TEAMWORK AND WELL-BEING

- 50% cited sports and fitness opportunities,
- 48% informal chats with colleagues,
- 47% work-related discussions with colleagues,
- 34% self-management and organization,
- 33% internal professional events,
- 30% internal company-wide events/get-togethers,
- 20% connection to company leadership



- **ONE IN TWO RESPONDENTS CITED SPORT AS BEING KEY TO THEIR WELL-BEING**
- **ONE IN TWO RECOGNIZED THE IMPORTANCE OF INFORMAL CHATS AND SOCIAL CONTACT WITH COLLEAGUES**
- **ONE IN THREE SAID THEY WANTED MORE PROFESSIONAL DEVELOPMENT**

SUMMARY

HOMESCHOOLING I

CHILDREN NEEDING SUPERVISION

68% had no children,
15% had children at kindergarten/nursery age,
17% had school-age children

VIRTUAL LESSONS

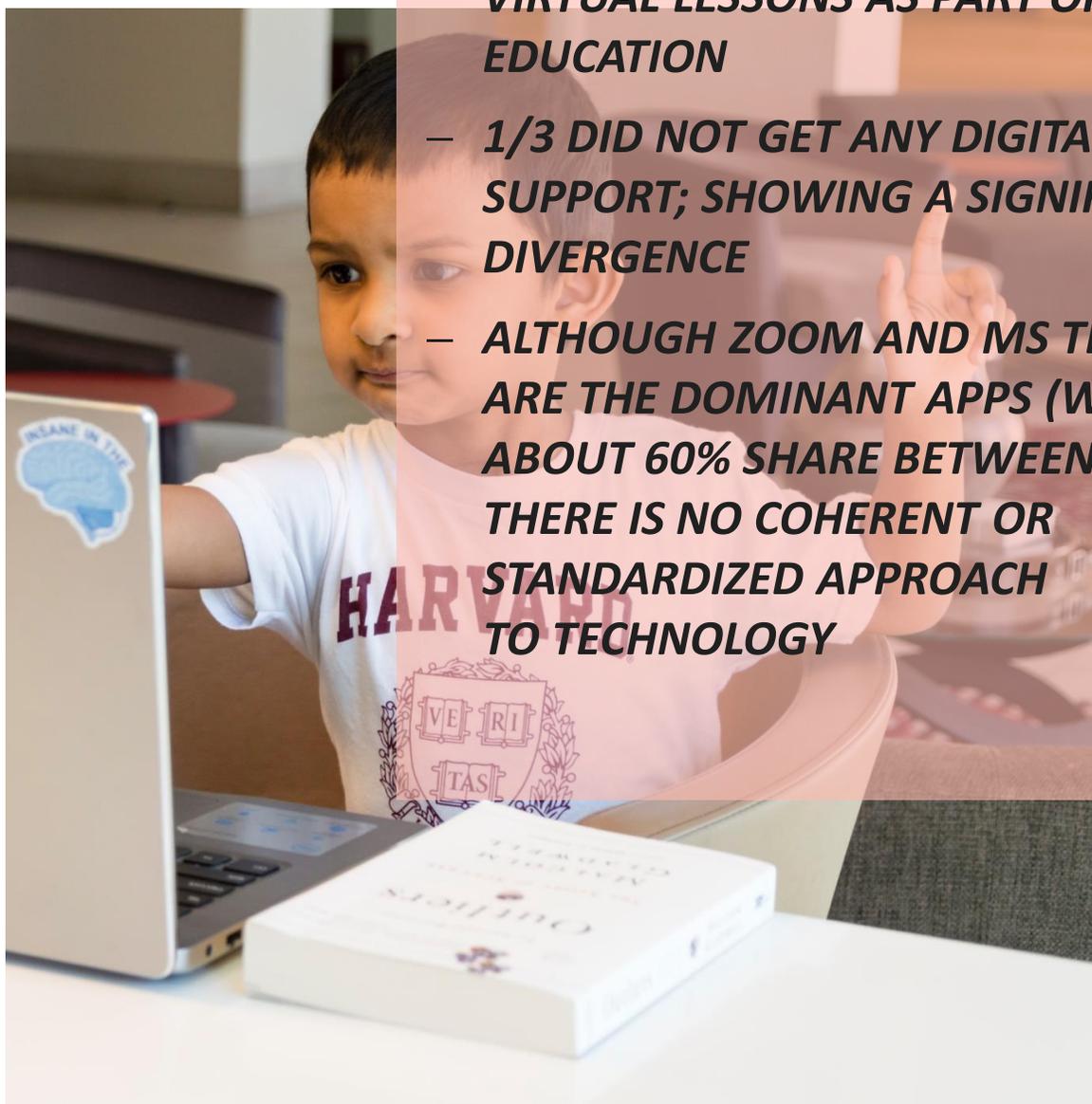
Did your children receive virtual lessons?

61% Yes,
39% No

If yes, what platform was used?

32% Zoom,
28% MS Teams,
13% Skype,
9% Cisco Web,
18% other apps (iserv, Intranet, bbb solution, Jitsi, Moodle, WhatsApp, Blizz, Alfaview, YouTube)

- **AROUND 2/3 OF SCHOOLCHILDREN HAD VIRTUAL LESSONS AS PART OF THEIR EDUCATION**
- **1/3 DID NOT GET ANY DIGITAL SUPPORT; SHOWING A SIGNIFICANT DIVERGENCE**
- **ALTHOUGH ZOOM AND MS TEAMS ARE THE DOMINANT APPS (WITH ABOUT 60% SHARE BETWEEN THEM), THERE IS NO COHERENT OR STANDARDIZED APPROACH TO TECHNOLOGY**



SUMMARY

HOMESCHOOLING II

COMMUNICATION TOOLS

Schools have been communicating with pupils using the following media

Email 39%,

MS Teams 16%,

WhatsApp 15%,

MEBIS 2%,

Other 28%

BREAKDOWN OF "OTHER" MEDIA

Analog → Paper, collected in person, Post, fax, telephone...

Digital → iserv, bespoke school system, Webex, Moodle, Schoolfox, Zoom, Platform, bbb Solution, School-Cloud, Edmodo, Blizz, sdui, WeChat, Blackboard App, Dingding App, WebWeaver, padlet, WebUntis, Iserv, EDYOU, Rocketchat, Dropbox ...

– **HUGE GAP BETWEEN DIGITAL AND ANALOG TOOLS**

– **DIGITIZATION IN THE EDUCATION SECTOR IS STILL VERY MUCH IN ITS INFANCY**

– **POPULAR COMMUNICATION TOOLS LIKE EMAIL, MS TEAMS AND WHATSAPP (70% SHARE) ARE UTILIZED FOR HOMESCHOOLING**



SUMMARY

HOMESCHOOLING III

HARDWARE USED BY CHILDREN TO ACCESS MATERIALS

25% Private laptop/tablet in the household

20% Private laptop/tablet for kids to use,

21% Private cellphone/smartphone for kids to use,

8% Parents' work devices,

8% Private cellphone/smartphone in the household,

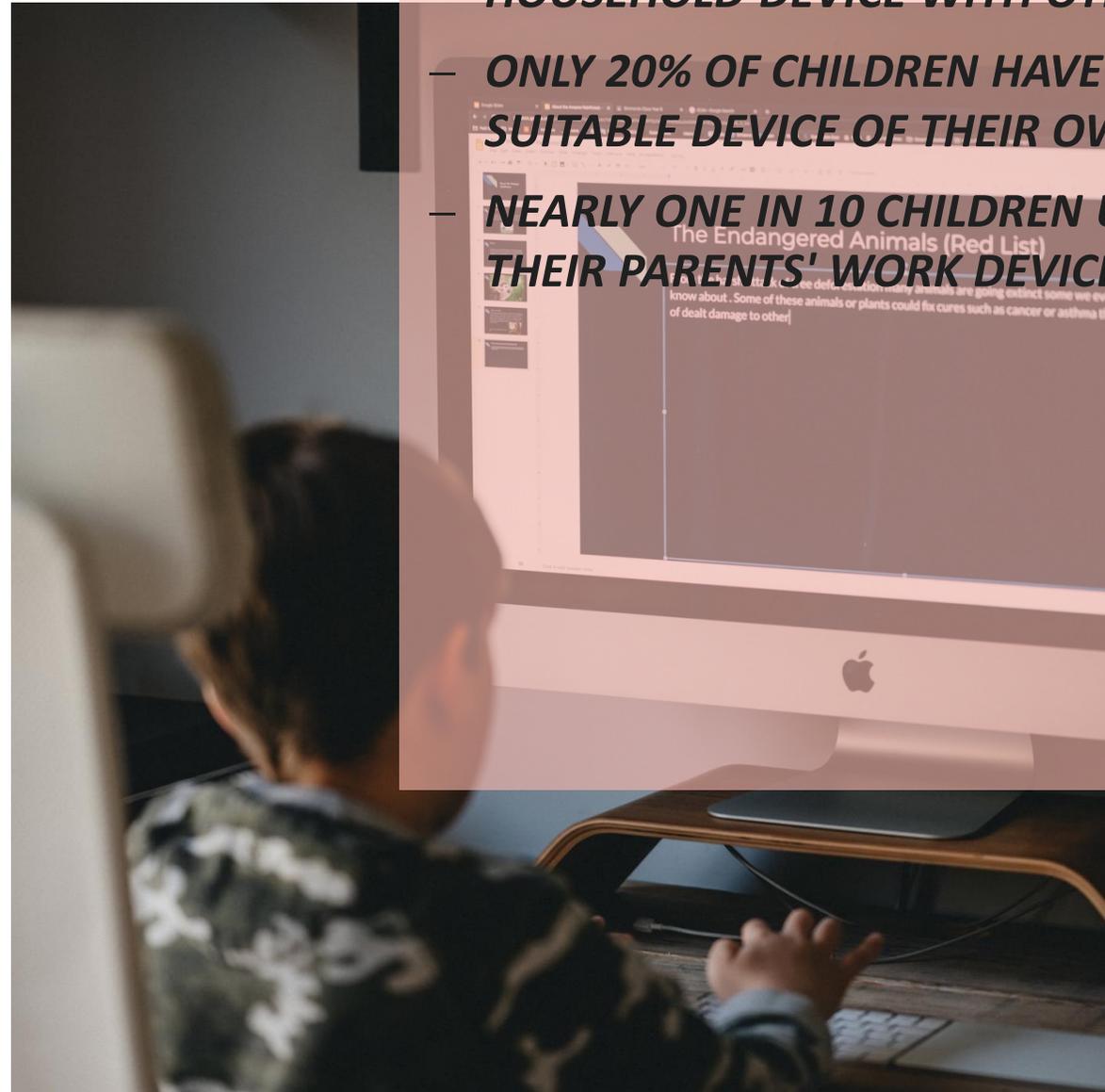
7% Private desktop PC in the household,

6% Private desktop PC for kids to use

5% New hardware had to be bought;

Only one person said: "There was no hardware available so it wasn't possible to access lessons and/or teaching materials."

- **25% OF CHILDREN SHARE A HOUSEHOLD DEVICE WITH OTHERS**
- **ONLY 20% OF CHILDREN HAVE A SUITABLE DEVICE OF THEIR OWN**
- **NEARLY ONE IN 10 CHILDREN USE THEIR PARENTS' WORK DEVICE**





THANK YOU

*P.S. LET'S NOT THROW OUT OUR
GROUP DYNAMIC BECAUSE OF
DISTANCING*