


REPORT
Savills Research

The Netherlands - Spring 2020

What Workers Want





What do employees want and how can employers respond?

Working from home: when virtual becomes vital



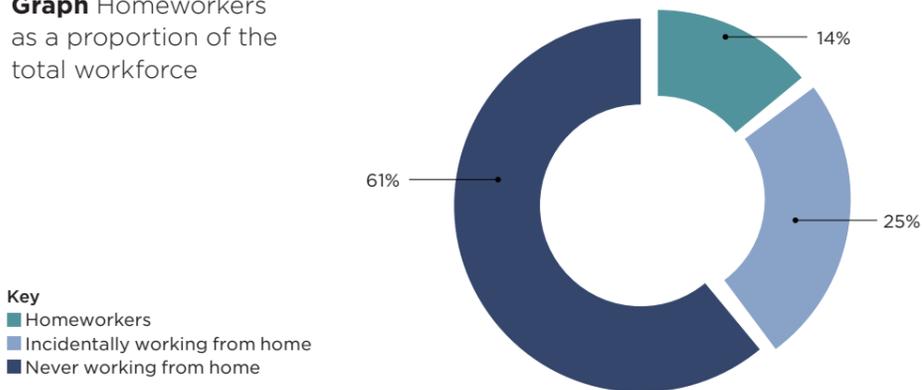
The new normal? Not yet it isn't!

Though there were exceptions, working from home used to be far from self-evident for the majority of the Dutch workforce. Working remotely on a structural basis was reserved for the very few (14%), while 61% never or hardly ever did so. The total workforce can be divided into two groups: the self-employed and employees. And there are significant differences between the two when

it comes to working from home.

As you might expect, the proportion of homeworkers was highest among the self-employed, many of whom run a business from home. It is also true that many in this group could not or cannot work from home due to the nature of their profession: independent contractors, plumbers and electricians to name but a few.

Graph Homeworkers as a proportion of the total workforce



Key
■ Homeworkers
■ Incidentally working from home
■ Never working from home

Source Central Bureau of Statistics Netherlands, 2019

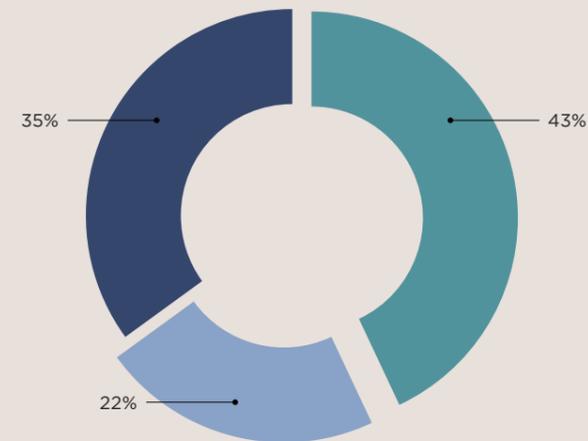
Introduction Our standard ways of working have been turned upside down by the outbreak of coronavirus (Covid-19). The impact of the measures taken to control the outbreak varies from sector to sector. In some professions, working life has partly or even largely come to a standstill, with the retail trade and hotel and catering as the most striking examples. In other sectors, such as business services, people are suddenly finding themselves working almost exclusively from home. These changes call for enormous adaptability. So just how adaptable are Dutch office users? What challenges are they facing and what can employers do to ensure that their staff perform as effectively as possible in these unprecedented times?



39% of office staff reported having the option of working from home

Graph Proportion of homeworkers among the self-employed

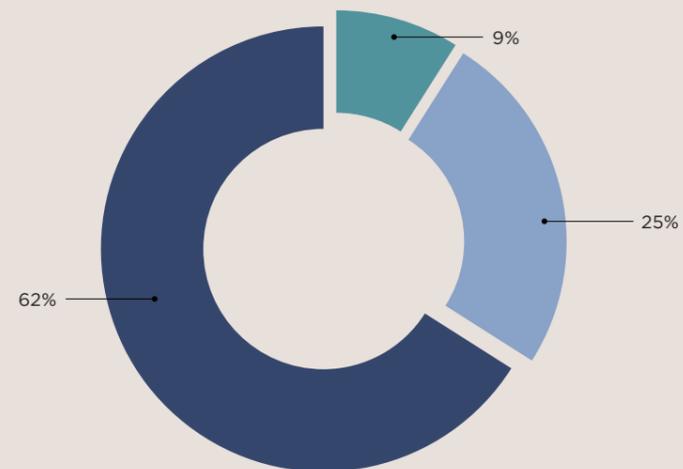
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■ Homeworkers
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For most employees, it's a very different story: although the possibility of working from home was widely available in theory, it tended not to happen. A mere 9% of employees regularly worked from home. This is partly why office workers have

been most affected by the current sea change in where and how we work. While the work they do continues, suddenly it has to be done in different ways and from a different location, both of which pose a whole range of challenges.

Graph Proportion of homeworkers among employees



Source Central Bureau of Statistics Netherlands, 2019

WHAT WORKERS WANT (WWW) IN BRIEF

Through WWW, Savills regularly charts the needs and wishes of employees by conducting a survey among 11,000 office workers in 11 European countries. Based on this survey, we have zoomed in on the needs and wishes as regards working from home in these unprecedented times.

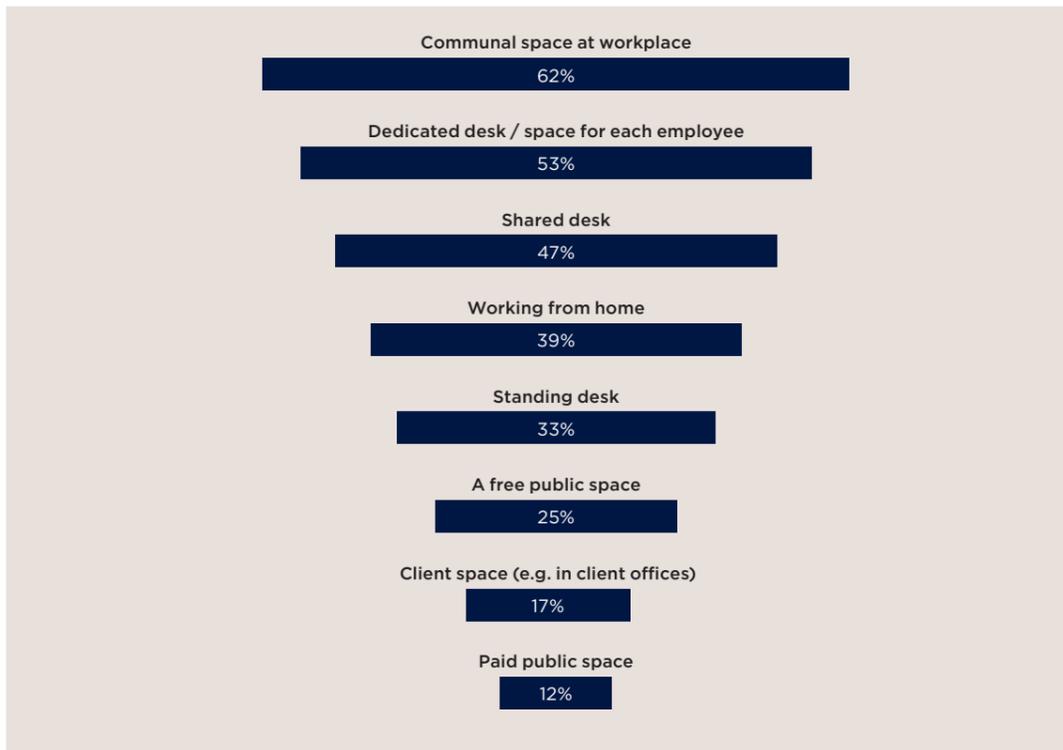
11,000 Office workers from 11 European countries took part in the What Workers Want survey

👉 Before the corona outbreak, 36% of employees in an office environment believed that their corporate culture did not encourage flexible working. 🗨️

‘Common sense’

Wasn't working from home supposed to be common sense anyway? Given the sudden and unexpected impact of the coronavirus, we have all experienced a rapid and urgent transition to working from home.

Graph Work locations facilitated by employers



Source Savills Research

This demands a great deal of versatility from both employees and employers. One key element is that employers need to facilitate working from home as effectively and efficiently as possible. While this might seem obvious, it's more complicated than you might think. Before the corona outbreak, employers who offered their staff the option of working from home were very much in the minority. Only 39% of office staff reported having the option of working from home.

The two main reasons why employees seldom worked at home until recently are striking enough: the lack of a corporate culture that encourages flexible working, and a lack of relevant technology. Before the corona outbreak, a significant proportion of employees (36%) in an office environment believed that their corporate culture did not

encourage flexible working. And interestingly, 26% indicated that they did not have access to the technology that would enable them to work flexibly and from home. In other words, working from home efficiently and effectively was certainly not a matter of course for everyone.

In the current situation, employers have been unexpectedly forced into encouraging people to work from home and providing the required technology. Optimal facilitation has one clear goal: to keep employees as satisfied as possible with a view to ensuring less of a dip in productivity despite these strange circumstances, or perhaps even an increase. What else can employers do to achieve results at present? To answer this question, it is first necessary to gain an insight into what employees regard as important.

THE TWO MAIN REASONS why employees seldom worked at home until recently.

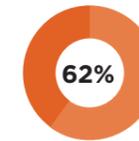


A corporate culture that encourages flexible working



The necessary technology to work flexibly

Source Savills Research



The majority of office workers say they consider having control over their own workplace to be important.

What do employees think is most important?

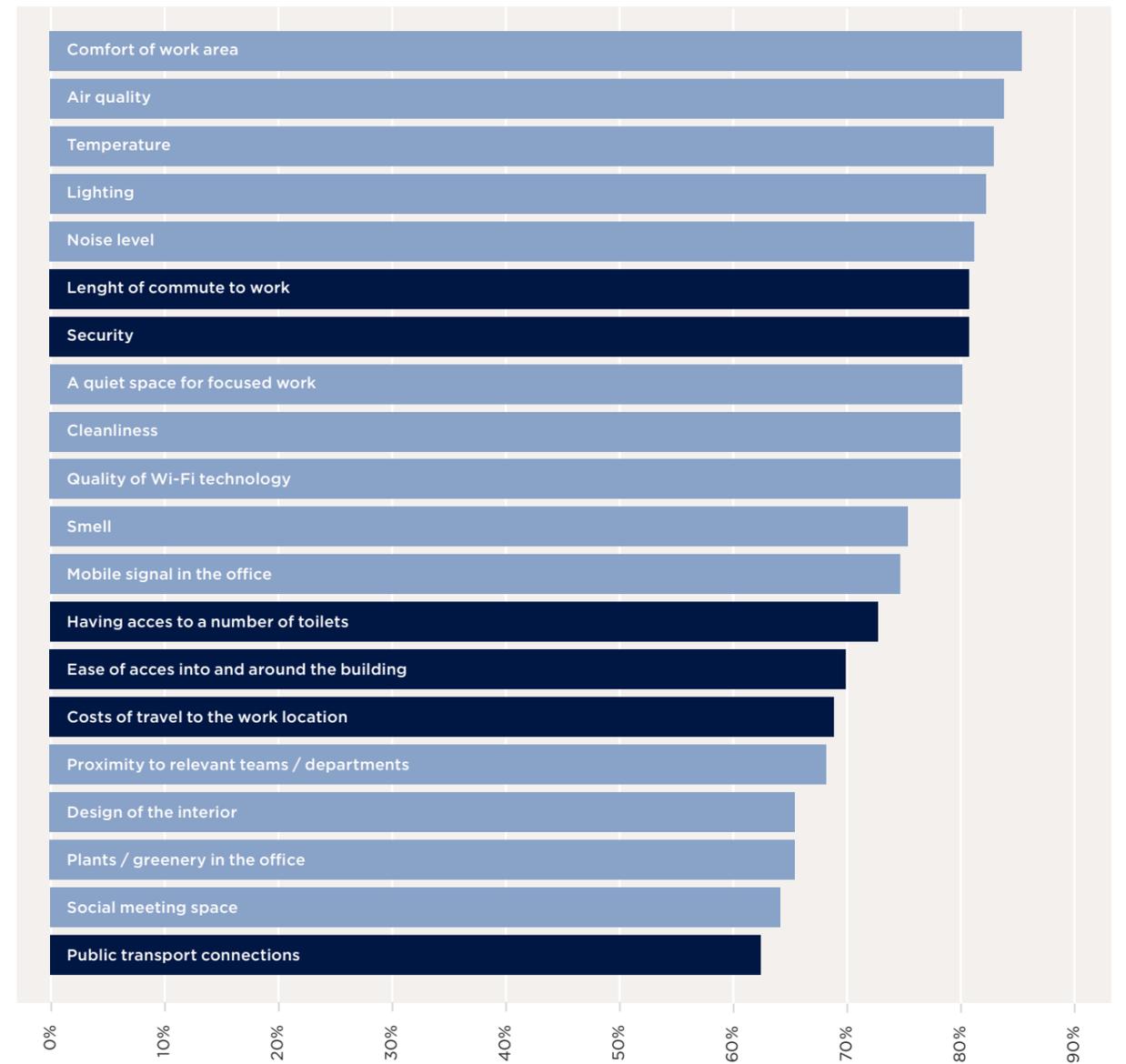
The main factors for a good workplace can be summed up as ‘the basics’.

This means comfort, air quality, temperature, lighting and noise level. In addition, many office workers attach importance to the presence and quality of key facilities. These include a good internet connection, the accessibility of the building and the

availability of common workspaces. Some of these elements simply do not apply in the current regime of compulsory homeworking. Since people no longer have to travel to work, a number of factors that are normally considered important can be

disregarded (those coloured navy). Even so, a considerable number of factors remain: no less than 14 continue to be important to an employee even in these homebound times. But are employers always able to cater to these needs?

Graph Top 20 most important factors for the ideal workplace



Source Savills Research

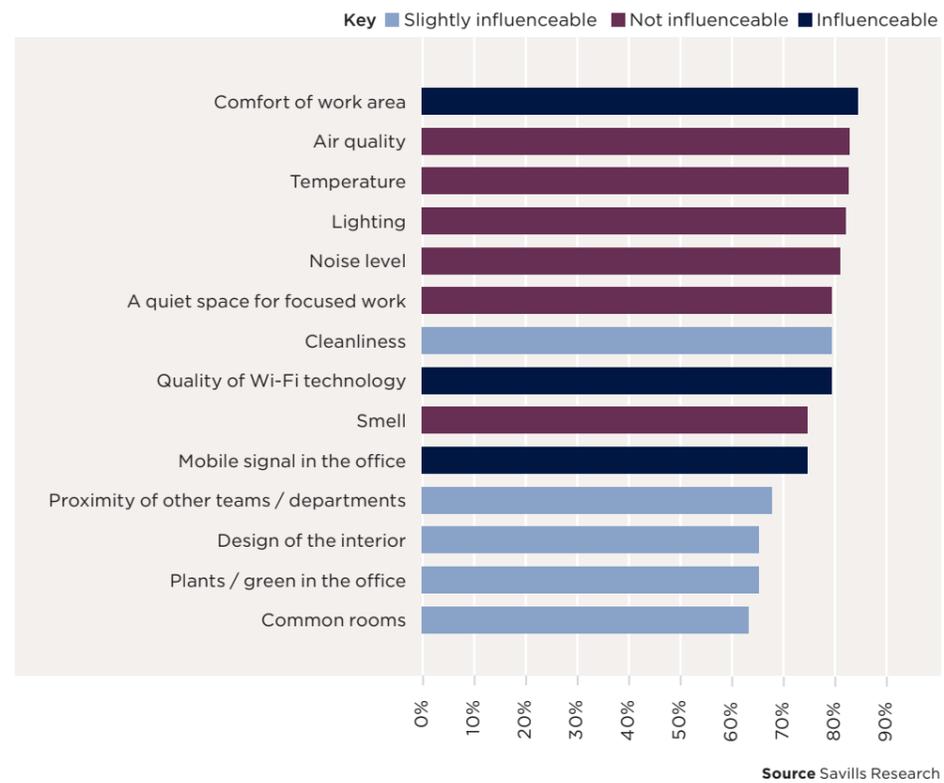
What can you do as an employer?

From living room to full-fledged workplace: what can you do as an employer?

The main factors in providing employees with an attractive workplace can only be influenced to a limited extent. For example, an employer has no influence on the air quality and temperature of someone's home workplace. This also applies to

environmental factors, such as safety and a quiet environment. However, a number of factors can be influenced, to some extent at least, such as comfort, contact with relevant departments and the opportunity to take part in meetings.

Graph Important factors, not influenceable and influenceable



Is there anything more you can do as an employer?

Are these practical interventions all you can do as an employer? Certainly not! At this time too, it is essential to engage your employees in a dialogue. The majority (62%) say they consider having control over their own workplace to be important. Talking to your employees and giving them a measure of autonomy in their current home workplace can boost job fulfilment by over 50%, which is very good news for productivity.

Does working from home necessarily have an adverse effect on employee satisfaction?

It is likely that working from home will have an

impact on productivity. After all, external factors such as trying to concentrate while the kids are at home presents people with distractions and challenges that will come at the expense of productivity.

However, the home workplace needn't lead to lower levels of employee satisfaction. In certain ways, the home workplace will never be able to match the office workplace. But the opposite is also true: a number of things employees are generally dissatisfied with in an office environment are usually well taken care of when working from home. The care of pets and children, for example, and the possibility of taking a break outdoors during working hours.

Top 5

A practical top 5 of what you can do as an employer

1 The most important factor for employees, the comfort of the workplace, can be supported to a certain extent. This might include transferring equipment such as an extra screen, keyboard, mouse, other technological resources and an (ergonomic) office chair from the office to the home workplace.

2 The cleanliness of the workplace is mainly up to the employees. However, employers can nudge things in the right direction by sharing quick and easy tips and tricks. These might take the form of an internal newsletter with a step-by-step plan for healthy working from home, a selection of fun facts and photos of a colleague's home office.

3 The quality of the internet connection depends partly on the strength of the employee's home Wi-Fi signal, although a Wi-Fi amplifier could provide a boost if needed. However, if the capacity of the company's network leaves something to be desired, this can quickly lead to frustration among employees. It is therefore vital to ensure that your network capacity is as strong as possible. Take action to optimise it where necessary.

4 The proximity of relevant departments and the availability of meeting rooms are important to employees: sure signs that they value smooth mutual cooperation. Provide high quality digital meeting facilities, so that employees can communicate easily – both with each other and with customers – and can see each other via a video link. It is essential to provide good instructions for digital meetings. Not only about how to use the technology but also about the do's and don'ts of how to interact during video calls. Encouraging social interaction online can be another way to help keep employees feeling happy and involved.

5 A pleasant environment can make all the difference: although most employees take the trouble to ensure their home looks its best, an employer could score points in this respect simply by sending a nice bunch of flowers to liven up the home working environment a little.

Key findings Working from home: when virtual becomes vital



Unusual Working from home was unusual for a large proportion of people. A mere 14% worked from home on a structural basis. Only among independent entrepreneurs was the proportion of people working from home relatively high (43%).

WWW Of the 20 most important factors relating to satisfaction in the workplace, 14 remain highly relevant in the current situation of compulsory working from home.

What can you do as employer Relatively little had been done to facilitate working from home, with only 39% of office workers having the opportunity to work from home.



Communication Engaging with employees contributes to job satisfaction, fulfilment and productivity.

What's next? The current situation is likely to provide a further stimulus to working from home, although this is likely to be limited. People are also discovering the disadvantages of working from home and want to keep seeing each other in person, as previous WWW research has shown.



Basic conditions A number of highly valued basic conditions are beyond the employer's influence. However, for 8 out of 14 relevant factors, an employer can take action to help make working from home a success. These include supporting comfort in the workplace and a good connection to the company network.

Sources Statistics Netherlands (CBS), Savills Research

IS WORKING FROM HOME THE NEW STANDARD?

Due to this unexpected transformation, companies – especially those which have so far been reluctant to encourage or facilitate working from home – are now seeing things in a different light. In all likelihood, this means that homeworking will continue to take off in years to come, as many companies review their homeworking strategy. However, human beings are social animals who derive fulfilment and gain inspiration from sharing the same space and working together in person. Although we are now weighing up the pros and cons of working from home, we are likely to experience a surge of positivity when we are able to meet again and re-establish the physical boundaries between home and work. After all, a change is as good as a rest.



Savills World Research

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