

GERMANY

WORKPLACE SURVEY 2019

37%

of workers have to work in the same space most of the time.

48%

of workers currently sit in shared offices of 2-6 people.

52%

of workers would prefer an open environment as long as private spaces are available.

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The German Workplace

Germany is a global powerhouse that combines economic diversification with a skilled labour market. Well-known for its product quality and engineering, Germany's polycentrism may go overlooked. In fact, the heart of Germany's economy is small and mid-sized cities, nine of which fall within the 500,000 to 1 million population range. That type of diversity mirrors the empowerment that every employee brings to their workplace. Robust union and workers council participation, in addition to sound vocational training, provide the recipe for an informed and empowered economic foundation to the German workplace.

While the country is revered for novel approaches to many things that make the German economy tick, workplace innovation lags. Workplace design and dynamics have not progressed to reflect the average German worker's expectations; therefore, satisfaction levels are relatively low. We have a holistic perspective on areas for improvement. More traditional design and organisational structures emphasize focused work—a priority for any business—however, collaborative work types are underutilized. To hit a stride of greater efficiency and satisfaction, investment in technology is key. Traditional hierarchical organisational structures may have yielded the meticulousness and rigour we have come to expect from German organisations; however, the German workplace must incorporate a more flexible paradigm to move forward. Change, directed towards these areas for improvement, makes for workplace evolution.

KEY FINDINGS

1.

The German workplace is in real need of transformation.

A current reliance on shared and group offices is failing today's workers, and standing in the way of collaboration and innovation.
2.

German workers are asking for more open, collaborative spaces.

The majority of German workers would prefer open environments as long as privacy is available when needed.
3.

German workers need a workplace that prioritises well-being.

The workforce has high expectations for health and well-being; current workplace design is missing the mark.

High-performance behaviours: The work modes

Work today is increasingly collaborative and dispersed across teams, organisations, and time zones. As organisations embrace the importance of delivering a great experience to all employees, they focus on elevating the workplace to drive not only individual productivity, but also the

entire range of behaviours that defines high-performance work. At the core of our ongoing Workplace Survey research efforts are the “work modes”: Gensler’s framework for understanding the full spectrum of activities that define work today.

44%

FOCUS

Working alone to complete individual tasks. This behaviour accounts for roughly half of the average worker’s day globally, and 44 percent of the average German office worker’s day.

7%

SOCIAL

Building relationships with colleagues. Socializing accounts for the smallest time allocation, but is crucial to employee performance and experience as companies focus on engagement, purpose, and meaning.

16%

VIRTUAL COLLABORATION

Working with others via technology (phone, video, screen-share). On average, this accounts for nearly one-fifth of the worker’s day globally. Time spent in virtual collaboration has increased dramatically in recent years.

6%

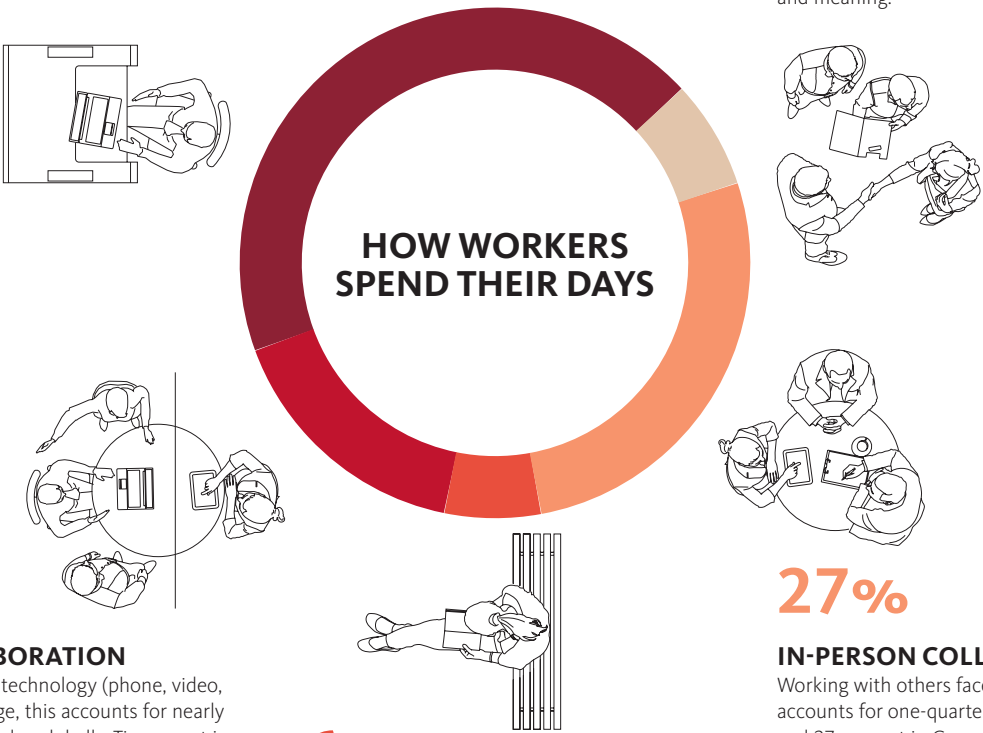
LEARNING

Training, mentoring, and skills development account for only 5-to-10 percent of an average worker’s day, but proves to be an extremely important behaviour associated with innovation and high performance.

27%

IN-PERSON COLLABORATION

Working with others face-to-face. On average, this accounts for one-quarter of the worker’s day globally, and 27 percent in Germany.



How the workplace drives innovation

The quality and configuration of the workplace has a direct impact on employee performance and organisational innovation—a key finding of Gensler’s prior Workplace Surveys and one that our most recent data on German workers confirms. Globally, employees in high-performing workplaces are also significantly more likely to rate their company highly on innovation as measured by Gensler’s Workplace

Performance Index (WPI). Innovation is presented through Gensler’s Innovation Index, a composite score reflecting the degree to which an employee views their company leaders, services, and products to be innovative and creative. This score has been proven to correlate with not only higher workplace performance, but also higher job satisfaction, likelihood to recommend one’s company to others, and overall workplace experience.

HIGH-PERFORMANCE WORKPLACES ARE MORE INNOVATIVE

Average innovation index scores for each tier of workplace performance. Innovation index is on a 5-point scale and workplace performance is measured on a 100-point scale.



The German workplace is lagging behind its international peers.

The German workplace has the lowest average WPI score of the six global regions studied in Gensler's Global Workplace Surveys. Further, only one in four German workers are in a "balanced" work environment, defined as those that effectively prioritise both focus and collaboration. A balanced workplace is directly connected to higher employee performance, experience, and innovation.

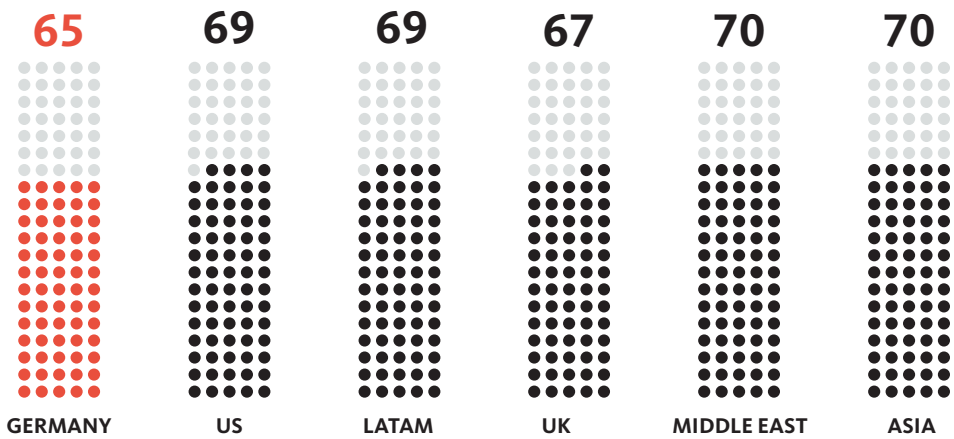
The bright side: German workers are currently adopting a progressive behaviour and mind-set around work that aligns with high performers around the globe. German workers spend more time socializing and learning than most global workers—nearly double what workers report according to our United States and United Kingdom Workplace Survey Reports. They also spend comparatively more time collaborating virtually, a behaviour that is also associated with high performers in our ongoing Workplace Survey research.

And just as important, German workers also see all work activities—not just focus and collaboration—as crucial to their job success, which may explain their willingness to devote a larger portion of their days to them.

However, the German workplace is less effective at supporting these activities than their global peers. And this is the crux of poor innovation scores: When an organisation does not equally support all work modes, there are consequences for how innovative and creative German workers observe their companies to be. Germans were critical of work modes, delivering the lowest effectiveness scores compared to any other global region. As we look to evolve the German workplace, our data indicates clear starting points—in particular, rethinking the German approach to open environments, financing improved technology, and focusing on well-being.

WORKPLACE PERFORMANCE

An aggregate score of 30+ variables measuring workplace effectiveness and functionality



27%

Only one-quarter of workers are in high-performance, balanced work environments.

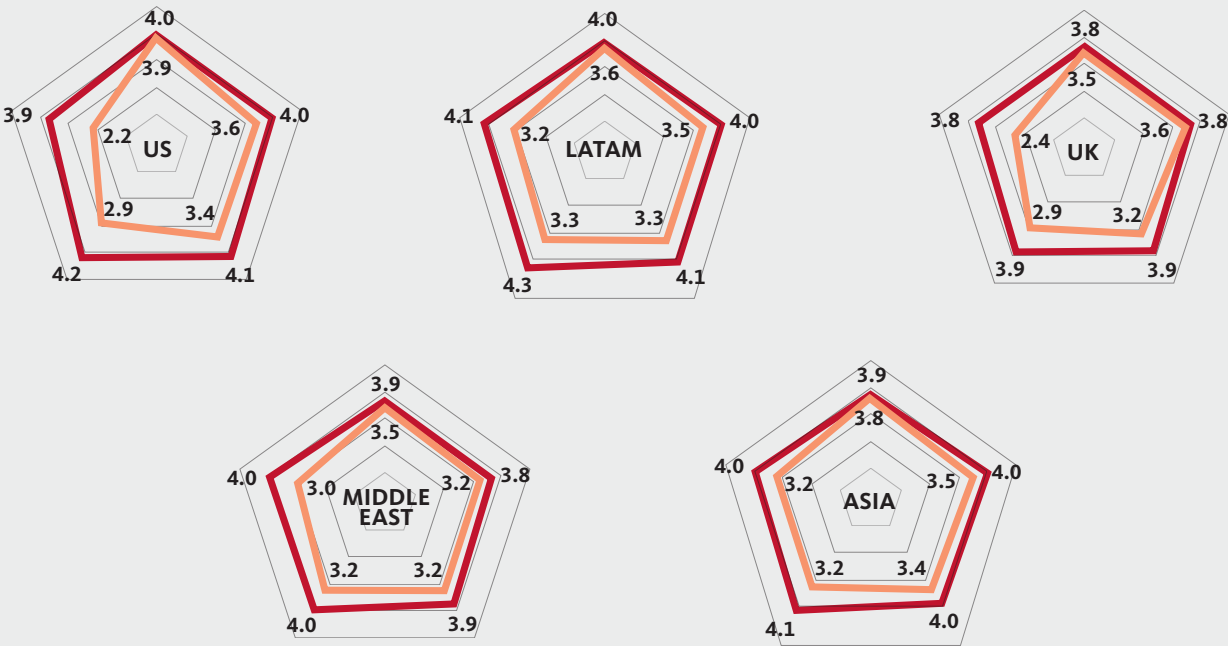
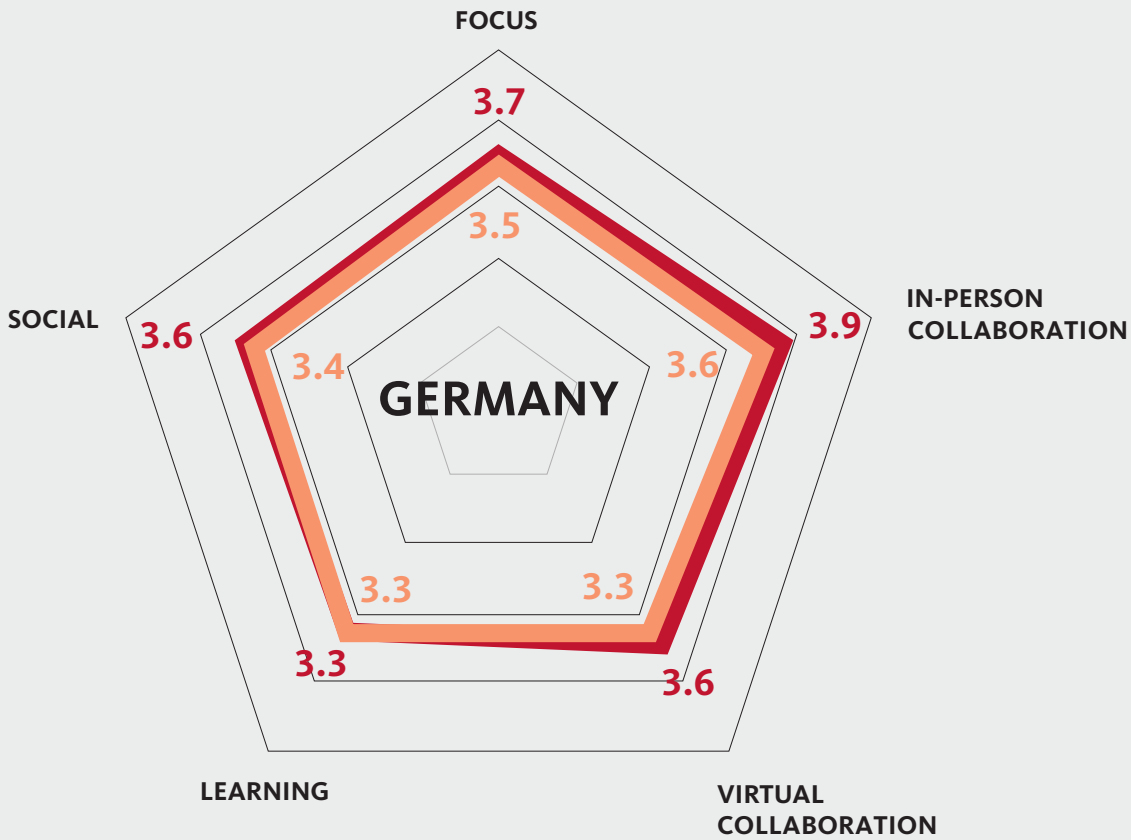
13+ million

Of an estimated 18 million office workers in Germany, that means over 13 million are in underperforming workplaces.

WORK MODE EFFECTIVENESS & CRITICALITY

Employees' ratings of the criticality of each work mode, and the effectiveness of their workplace in supporting that mode, each on a 5-point scale.

- Effectiveness score
- Criticality score



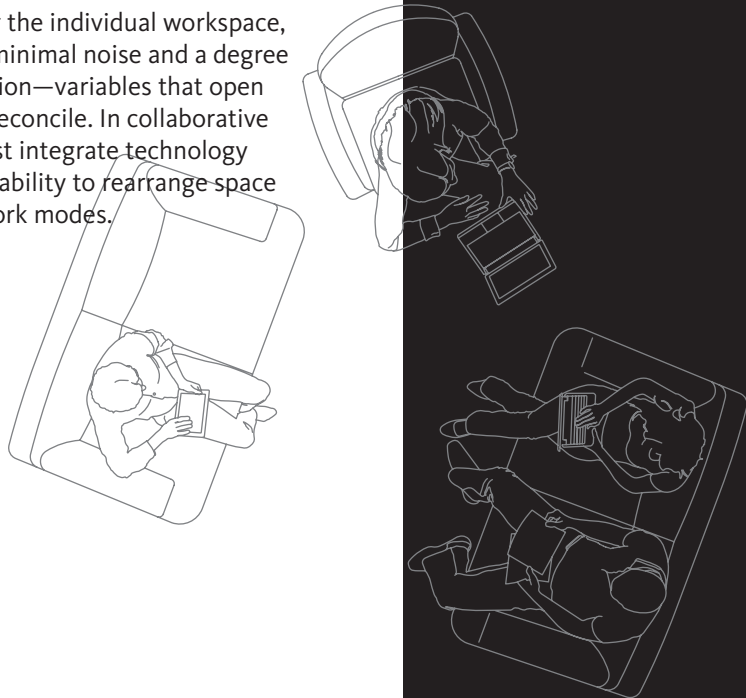


Germany invented the open office, but they aren't using it. With the concept of Bürolandschaft, Germany once led the world in moving towards a dynamic, open space office environment. Today, however, the German office is dominated by shared and group offices: nearly half of our respondents work in a shared office of between two and six people. Only one-quarter of respondents work in an open office of some kind, about half the number of what we see in the United States and United Kingdom.

From the standpoint of effectiveness, shared and group offices occupy an interesting middle ground between individual private offices and the more open environments that are currently the norm in other parts of the world. For individual, focused work the private offices perform best on average, followed

by two-person shared offices; group offices perform similarly to open plans. For collaborative work, the inverse proves true—private offices have the lowest effectiveness; shared, group, and open office scenarios perform similarly.

There are, however, universal factors that create high effectiveness in all space types. The strengths of different space typologies belies the versatility of what Germans need in a high-performing workplace. Spatial drivers of workplace effectiveness offer a more granular approach to what makes work productive. For the individual workspace, workers need minimal noise and a degree of personalization—variables that open formats must reconcile. In collaborative spaces, we must integrate technology and create the ability to rearrange space for different work modes.



3.3

German workers' average innovation index rating, the lowest of any global region studied.

2x

Germany has double the number of employees in shared-office settings compared to the US or UK.

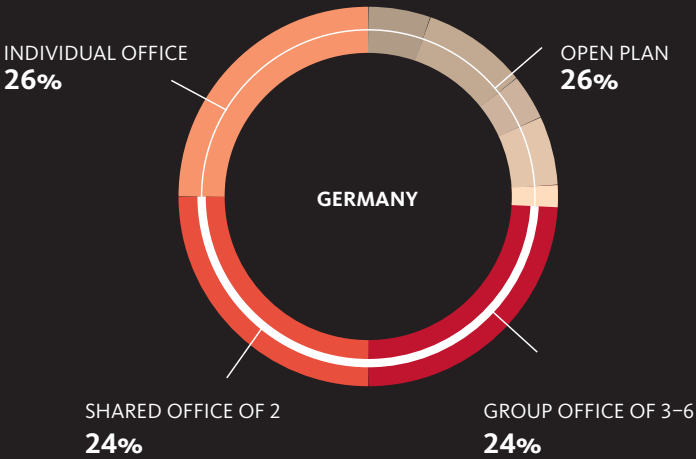
DRIVERS OF WORKPLACE EFFECTIVENESS

Results of a multiple linear regression analysis of physical attributes and workplace effectiveness.

- 1 Noise Management (Individual space)
- 2 Personalisation (Individual space)
- 3 Ability to rearrange (Open collaborative spaces)
- 4 Technology to support group work (Meeting spaces)
- 5 Ease of contact with people and resources (Overall workplace)

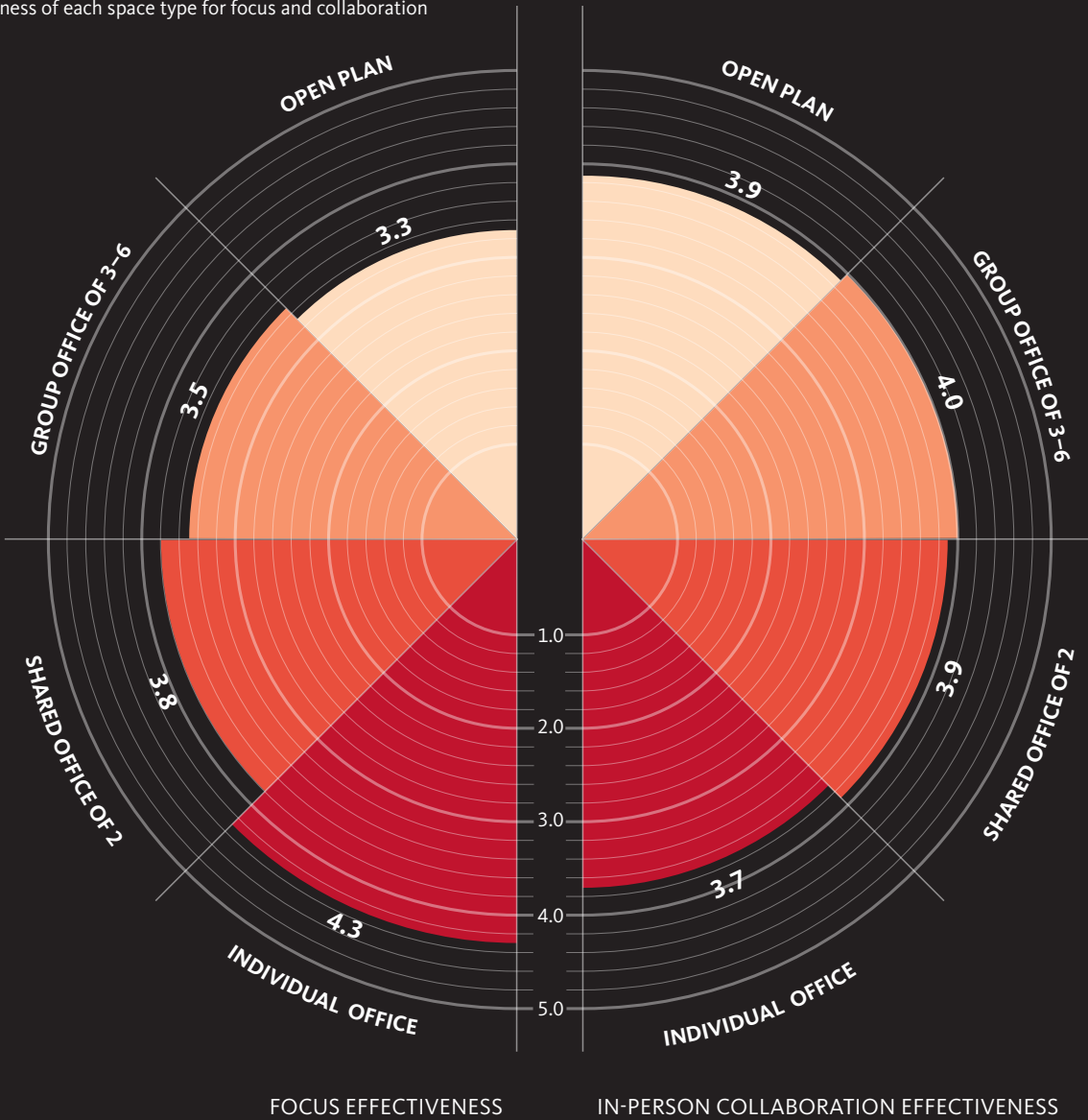
INDIVIDUAL SPACE TYPES

Percent of respondents in each type of individual workspace.



WORK MODE EFFECTIVENESS

Rating of effectiveness of each space type for focus and collaboration on a 5-point scale.



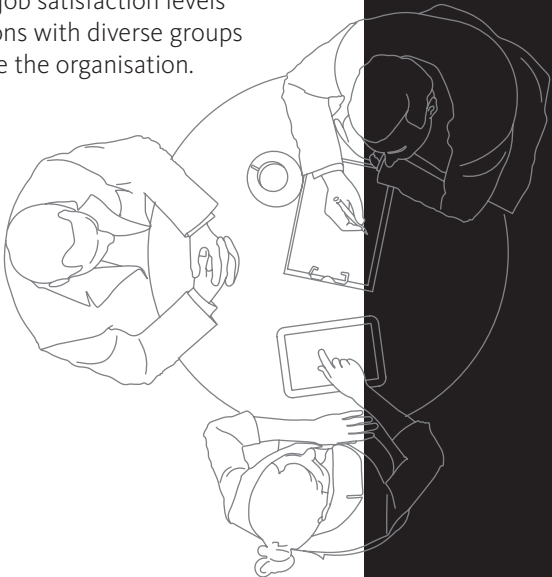


Given the opportunity, only a fraction of German workers would choose a work environment that uses private offices exclusively. Over half of our survey respondents would prefer a more open work environment, but today three-quarters of those same respondents work in an enclosed office type. A shift to a more open environment entails not only changes to the individual workspace, but also diversifying space through a greater availability of meeting areas and multimodal spaces that support a wider range of behaviours and a better at-work experience.

This approach to the workplace is the crux of what we call “balance.” A balanced workplace is one that prioritises both focus work and collaborative work. To create the path forward, we identified the key statistical drivers of workplace

balance—from a welcoming aesthetic to well-designed common areas and integrating the latest technology. Technology is particularly important to German workers. Access to technology is ranked as the second most important reason (after focusing on work) for coming into the office.

Balanced workplaces show distinct benefits; they are better for people and for business. Employees from balanced workspaces significantly outperform those from unbalanced environments on all key metrics—including experience, satisfaction, and innovation. At every turn of data, we find a great disparity between respondents from balanced vs. unbalanced workplaces: from job satisfaction levels to more interactions with diverse groups within and outside the organisation.



4%

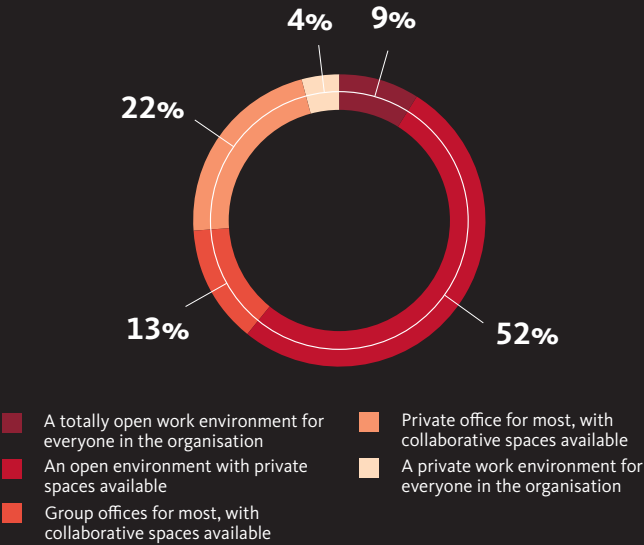
Only 4 percent of German office workers would prefer a work environment with a private office for everyone.

1.3x

Workers in balanced workplaces rate their ability to experiment with new ways of working 1.3 times higher.

BEST WORKPLACE TYPES

Respondents' rating of which type of physical office configuration is best.



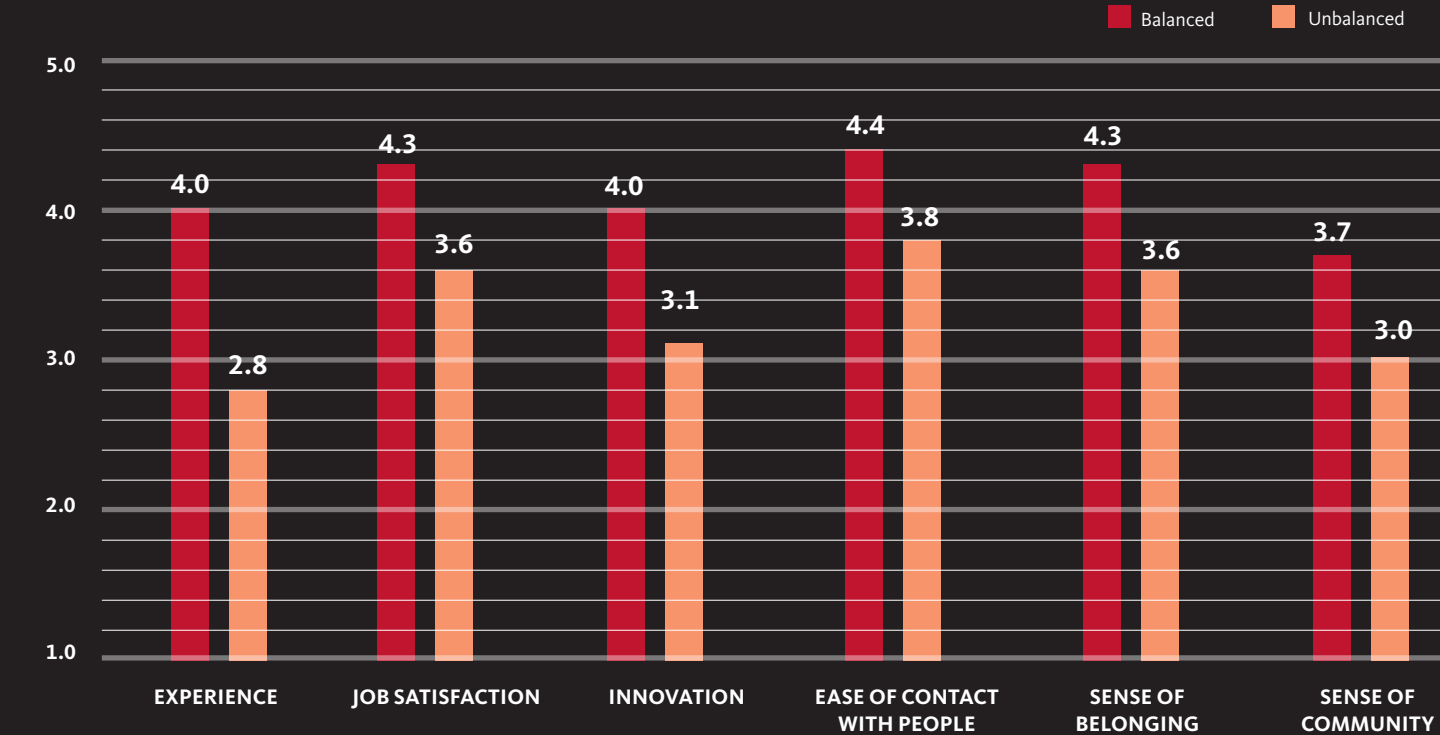
DRIVERS OF A HIGH-PERFORMANCE WORKPLACE

Results of a multiple linear regression analysis of a comprehensive set of workplace variables and high-performance workplace.

- 1 Welcoming
- 2 Sense of community
- 3 Latest technology
- 4 Well-matched to job requirements
- 5 Clear hierarchy
- 6 Variety of spaces
- 7 Design of corridors/common areas

PERFORMANCE AND EMPLOYEE EXPERIENCE METRICS

Rating of various employee experience metrics on a 5-point scale, balanced vs. unbalanced environments.



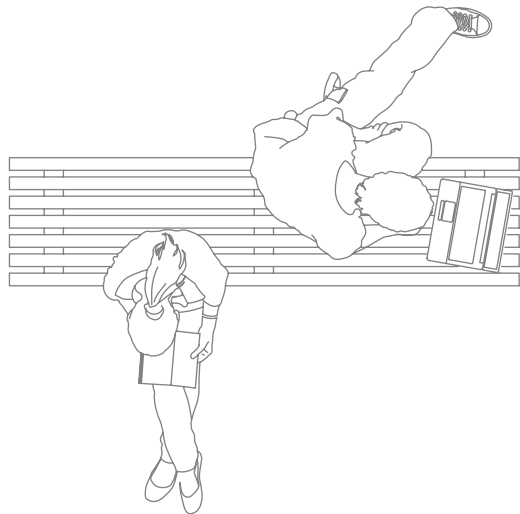


German workers ranked health and wellness as the most important attribute of a great workplace, followed closely by maximizing individual productivity and promoting collaboration. The country's progressive approach to sustainability and well-being, as well as the influence of workers councils on the form of buildings and workplaces, mean that functionally their workplace has a leg up. Looking beyond functional factors to issues of behaviour and experience, German workers today are falling short on well-being, despite identifying it as a priority.

At the end of a typical day at the office, German workers are likely to feel accomplished, but feel depleted and lacking a sense of individual accomplishment. Employees may take breaks with colleagues and socialize,

but they are less prone to taking time to be outside or taking time to unplug from technology, despite placing a high premium on the synergy between people and the environment.

Perhaps even more challenging, workers who rated health and well-being as the most important aspect of the workplace appear to be the least satisfied. Respondents who prioritised health and wellness are less likely to report being in balanced workplace environments, see their workplaces as offering less variety of spaces, and are less likely to overall report a great workplace experience. These workers are in the greatest need of diverse workspaces, placing greater emphasis on amenities such as grocery stores and outdoor spaces.



47%

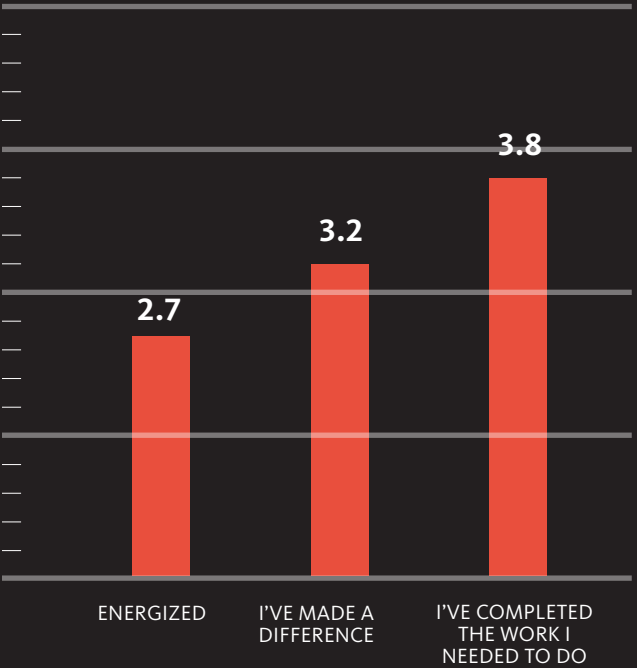
Well-being was a top attribute of great workplaces for nearly half of workers, rated higher than individual work and collaboration.

37%

Over a third of workers report that they have to work in the same space all of the time, often because of policy or technology needs.

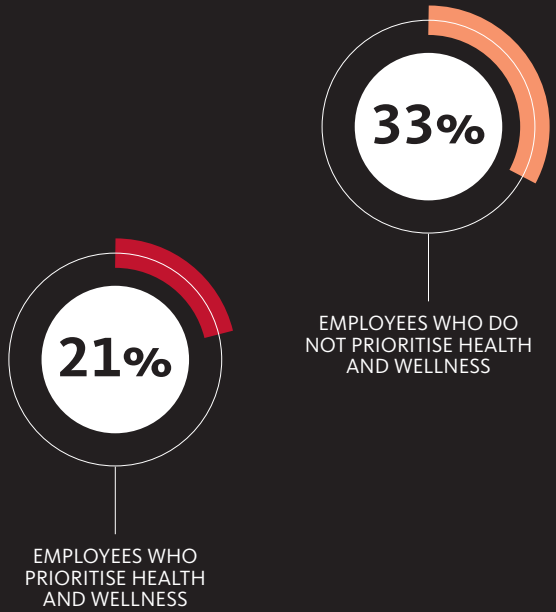
EMPLOYEE WELL-BEING

Rating of how energized, purposeful, and productive respondents feel at the end of a typical day on a 5-point scale.



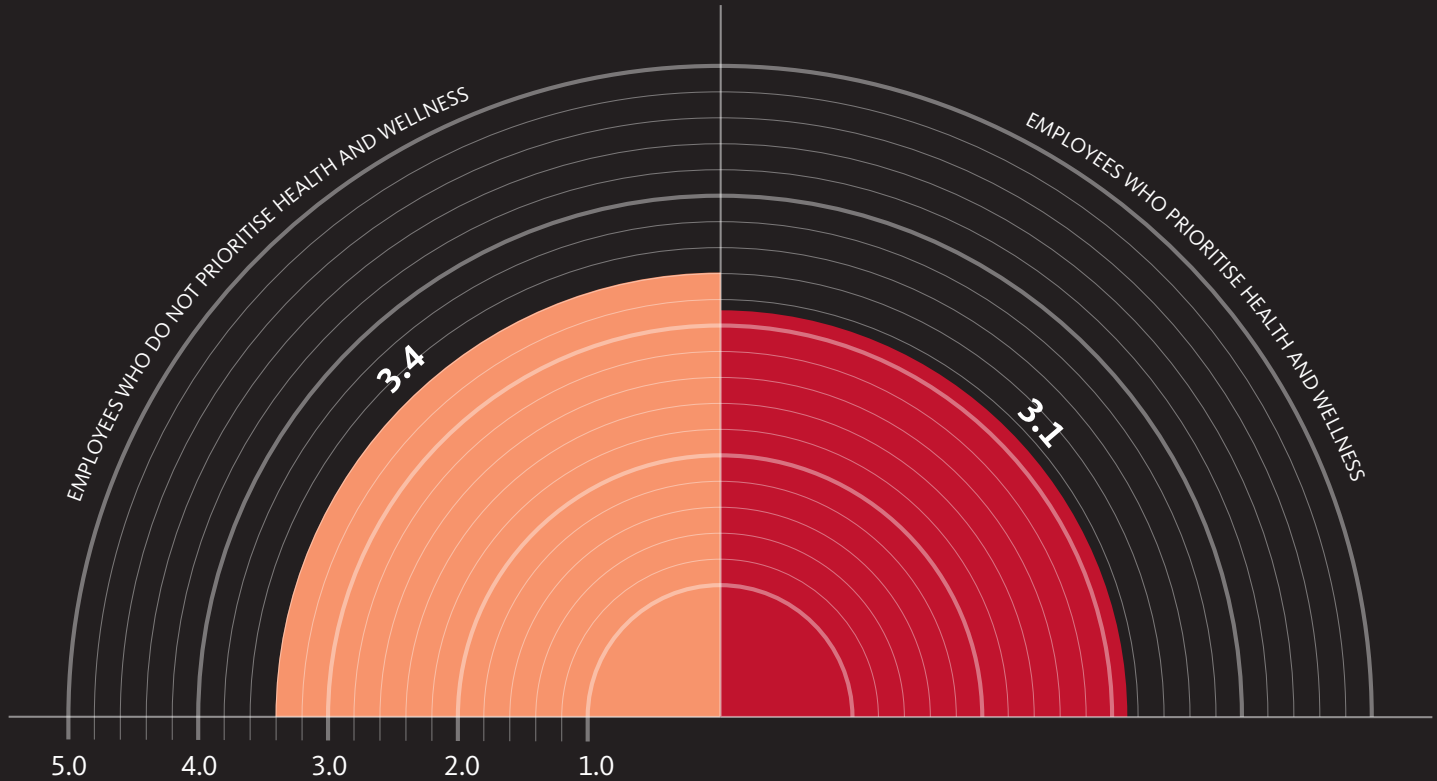
PERCENT IN A BALANCED WORKPLACE

Percent of respondents who report that their workplace prioritizes both individual and collaborative work.



WORKPLACE VARIETY

Respondent rating of whether their workplace has a good variety of spaces on a 5-point agreement scale.





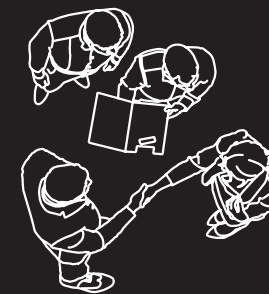
INDIVIDUAL

Moving past the group office to find a better type of open.



GROUP

Creating a balanced workplace ecosystem that promotes connection, collaboration.



COMMUNITY

Using a focus on well-being to drive meaning, purpose, innovation, and performance.

Group offices aren't working for German workers; it's time for a new approach.

We know the attributes of the physical environment that maximize workplace effectiveness and experience—and we also know that the global community is transitioning to more open, more collaborative office environments. By listening to the German worker, the design community can help realize an imminent change away from shared and group office types to a workplace that fosters both focus work and collaboration. Germany has an opportunity to take the best parts of shared, group, and open office designs to create its own future. Investing in specific attributes that make open offices work is key. Noise, design, layout, access to people, and adjustability are all drivers of workplace effectiveness for all work activities.

Give German workers the balanced, collaborative environments they're asking for.

We must create a more dynamic, multimodal workplace landscape to reflect the needs of the German workforce. That means treating the workplace as an ecosystem of spaces, and investing at the scale of the team or group as well as the individual. The drivers of balanced workplaces offer a roadmap here—greater space variety, and spaces that feel welcoming and offer the latest technology. Investments in technology should also prioritise support for virtual collaboration: German workers collaborate virtually more than any Western region we studied. Globalization means that client and organisational networks are growing, so if efficiency and performance are to keep up with this trend, the German workplace must invest in technologies that promote interconnectedness.

Workers expect the office to deliver on health and well-being; make it a priority.

The German workforce is serious about health and wellness—the workplace needs to keep up. A well-being focused culture, and the institutional power to back it, means that the basics of health and wellness are met—but Germans expect more. A comprehensive amenity and workspace strategy focused on physical and psychological well-being is a must. Germany has the thought leadership to succeed. For a country that has led much of the Western world on sustainability and innovation in manufacturing, a renewed focus on the workplace is bound for remarkable results.

Research methods

Inferential and descriptive statistical analysis of a panel-based sample

This survey represents data collected via an online, panel-based survey conducted among a sample of 2,250 German office workers representing a broad cross section of demographics, including education, age, gender, and location. Global comparisons data draws on other surveys conducted in a parallel manner in other regions around the world. Respondents include knowledge workers who work in an office some or all of the time within 10 industry segments. Gensler recruited survey respondents via a third-party panel provider—respondents

were anonymous to Gensler and were not required to work in workplaces designed by Gensler. Inferential and descriptive statistical analyses were conducted by the Gensler Research Institute team. Survey questions include those from Gensler’s WPI alongside additional questions that ask respondents to rank their workspaces and companies across a variety of factors, including innovation, motivation, choice, and technology, as well as individual patterns of behaviour and preferences.

2,250
panel-based, random sample
respondents (GERMANY)

15,000+
panel-based, random sample
respondents (GLOBAL)

The WPIxSM

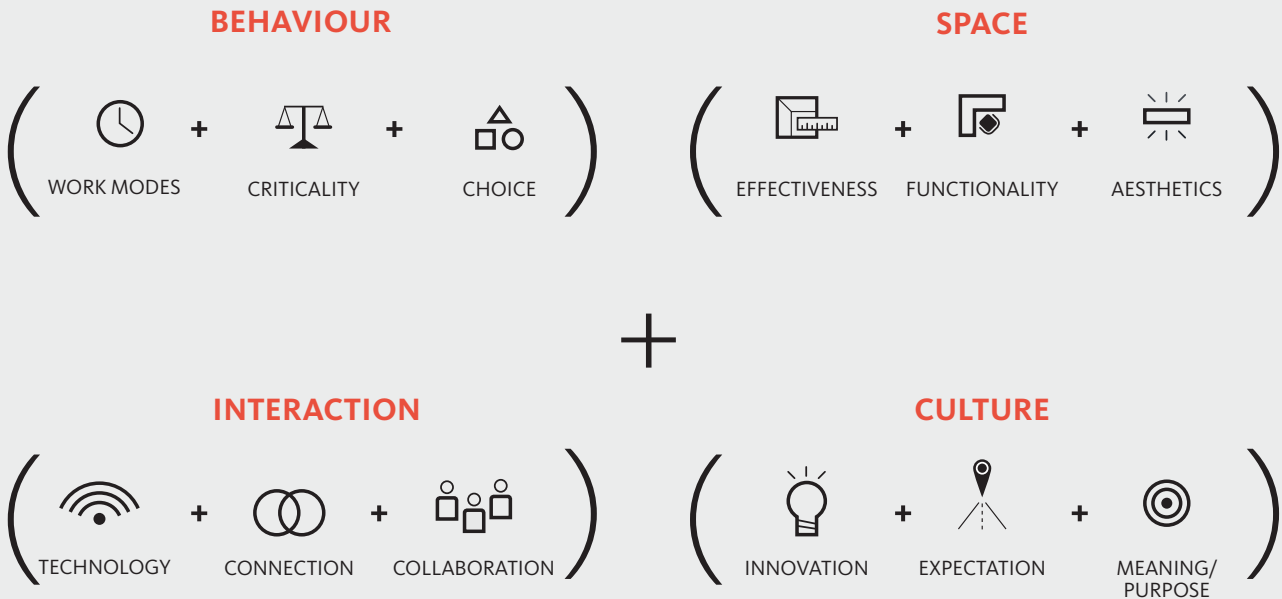
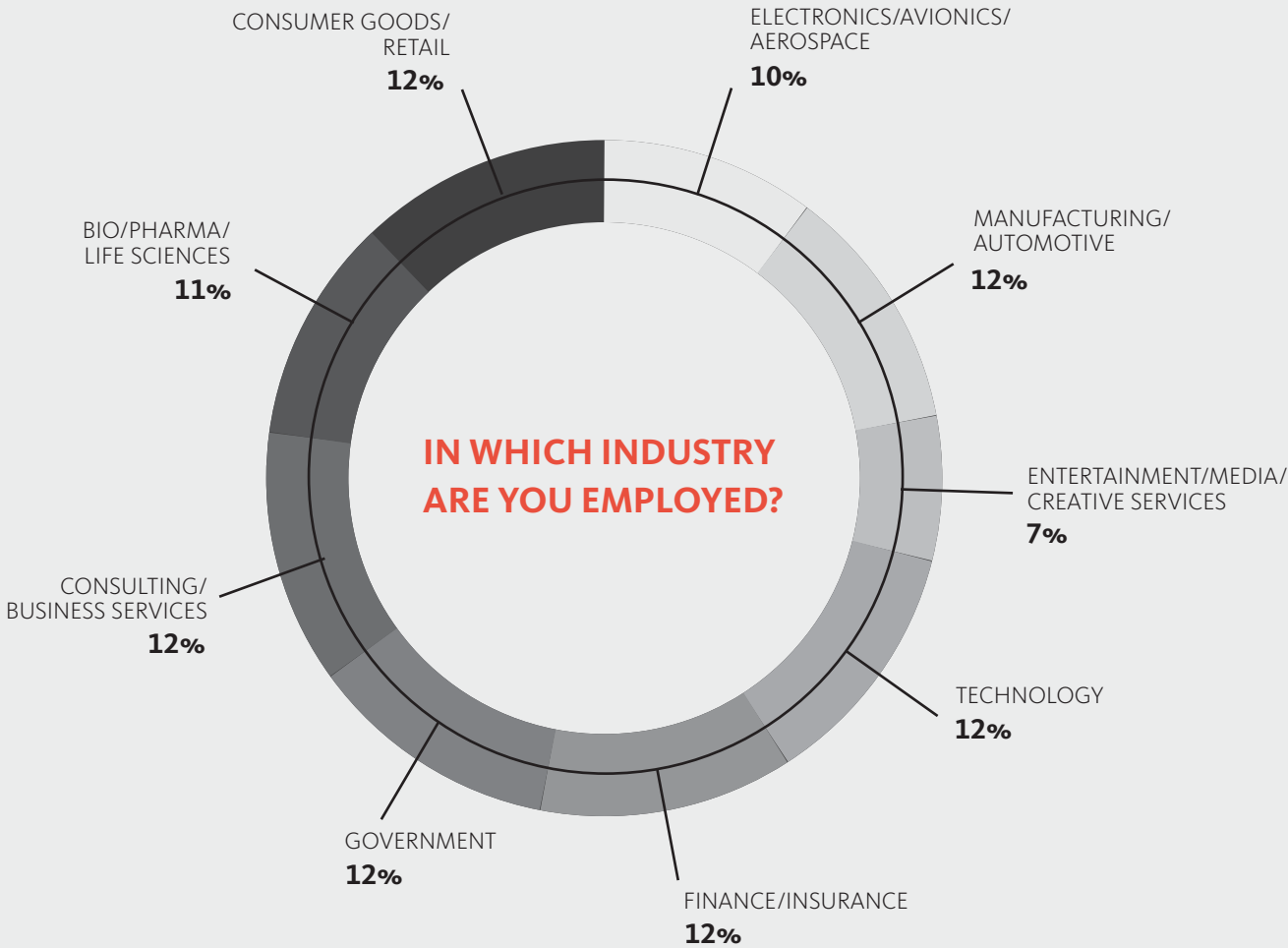
A diagnostic tool to measure workplace performance and experience

Gensler’s WPIx is a proprietary, web-enabled survey tool designed to measure the performance and experience of an individual workplace or client portfolio. The tool is used for both pre- and post-occupancy analysis to allow for comparisons and to document improvements in workplace design, performance, and experience. In the pre-phase, employee input on workplace performance factors is gathered at the beginning of a project in order to inform design decisions. In the post-phase, following project completion, employee input is gathered to measure the success

of the design solution. By using a core set of parallel questions, individual projects can then be directly compared to the results of national surveys to put project work into a context of broader knowledge and trends in workplace design. WPIx surveys are conducted as a part of direct client engagements. The results of WPIx surveys are collected in a separate database from Gensler Workplace Survey responses—the WPIx database now has over 300,000 survey responses from employees of Gensler clients, representing respondents from 50+ countries.

331,000
client respondents

50+ **11**
countries languages



WPIxSM MEASURING
PERFORMANCE &
EXPERIENCE

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