

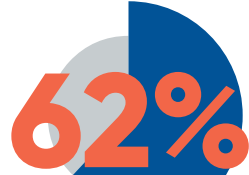
Tomorrow's offices:

flexibility first!

An OpinionWay'
survey for Covivio


Towards new ways of working...

COVIVIO × *“opinionway*

A circular graphic divided into two segments: a larger blue segment on the right and a smaller grey segment on the left. The number '62%' is written in orange across the center of the circle.

62%

**of employees see flexibility
as a major lever for action to improve
their working environment**

A circular graphic divided into two segments: a larger blue segment on the right and a smaller grey segment on the left. The number '46%' is written in orange across the center of the circle.

46%

**of employees expect
the development of alternative
solutions (such as coworking)
to traditional workspaces**

A circular graphic divided into two segments: a larger orange segment on the right and a smaller grey segment on the left. The number '70%' is written in blue across the center of the circle.

70%

**of top managers say
they want to make changes
to enhance their real estate**

Before, during and after lockdown: comparative opinion survey of employees and top managers

We are experiencing a totally unprecedented situation that is impacting our habits and way of life, whether we are talking about social, economic, health... or professional aspects.

On this last point, our relationship to work has indeed undergone a radical upheaval since lockdown: it is sure that the office must and will be deeply transformed. Some companies are already questioning the function of their offices, while employees have already changed their habits, in particular by working from home. However, questioning the use and future of the office and alternative ways of working is not a totally new phenomenon. In fact, the current crisis is merely acting as an accelerator of existing trends.

As a long-term real estate operator, Covivio supports its corporate clients meet the challenges of transforming and enhancing their appeal by designing spaces and services tailored to their image. Firmly believing that flexibility and services nowadays are key, Covivio is converging its commercial lease and service contract offerings with a view to providing clients ever more flexible and tailor made solutions.

This survey was conducted in three phases (February, July and October 2020) on a representative sample of French private sector employees and top managers in companies with at least 250 employees. It is designed to fuel debate and strategy at Covivio to constantly improve its response to the new challenges posed by tomorrow's office, underpinned by two overriding concerns - people at the core and flexibility first.

NOTE ON FIGURES AND CHANGES:

ALL FIGURES STATED ARE DERIVED FROM PHASE 3 OF THE SURVEY. STATED CHANGES ARE THOSE OBSERVED BETWEEN PHASE 1 (FEBRUARY) AND PHASE 3 (OCTOBER).

« This survey shows us that employees and top managers share expectations and demands regarding changes to be made to the office as a physical space and collective destination.

Employees very firmly express their desire to keep the social aspect of their workspace, thereby raising their expectations regarding matters such as flexibility, work climate and the provision of varied workspaces tailored to all work postures.

So, flexibility has become a new priority for everyone with regard to real estate, where to the famous triptych «location, location, location», the new «flexibility, flexibility, flexibility» has been added.

OLIVIER ESTÈVE,
Deputy CEO,
Covivio



employees
who expect
more flexibility
and a reinvented
"office destination"





The office: where I want, when I want... but together!

When employees are asked what defines a pleasant working environment, two criteria spring to mind: **work climate mentioned by 77% and flexibility (working hours, working from home, etc.) by 62%**. These are followed by location of premises (47%), efficient equipment and connectivity (45%), relaxation and social areas (22%) and workspace layout (10%).

This ranking remained stable over the 9-month survey period, which bears out **the importance of the social dimension of the office, clearly identified by employees.**

Generally lower satisfaction, afflicted by the crisis period

During this challenging period, employee satisfaction has declined, reflecting greater expectations and demands about their workspace.

Work climate in particular has deteriorated due to office restrictions and social distancing. Now, 75% of employees are satisfied, down significantly by 7 points since February. Along the same lines, 68% are satisfied with their degree of flexibility and 63% with the quality of their workspace layout, both results down 5 points since February. These changed opinions are significant in a relatively short period and point to long-term shifts.

- **Unsurprisingly, the youngest people, for whom flexibility is particularly important, say they are the least satisfied in this matter (58% of 18-34 year old employees vs. 75% of those aged 50 and over).**
- **Employees of medium-sized companies (250-999 employees) are also less satisfied with the flexibility they are offered (63% vs. 72% of employees of larger companies).**



Flexibility, comfort and work climate: levers for action

Well aware of a changing environment that will impact their workspaces, employees clearly identify priorities requiring action in order to improve their everyday life at the office. **Flexibility has emerged as the no. 1 lever of action for improving the working environment: 27% of employees mention it (up 8 points since February).** Next come work climate (20%, up 2 pts) and having efficient equipment and good connectivity (18%, down 1 pts), both areas that influence whether employees enjoy being and work effectively at their office. Lastly come factors relating to comfort: workspace location (12%, down 3 pts), having relaxation and social areas (11%, down 6 pts) and workspace layout and interior design (11%, stable).

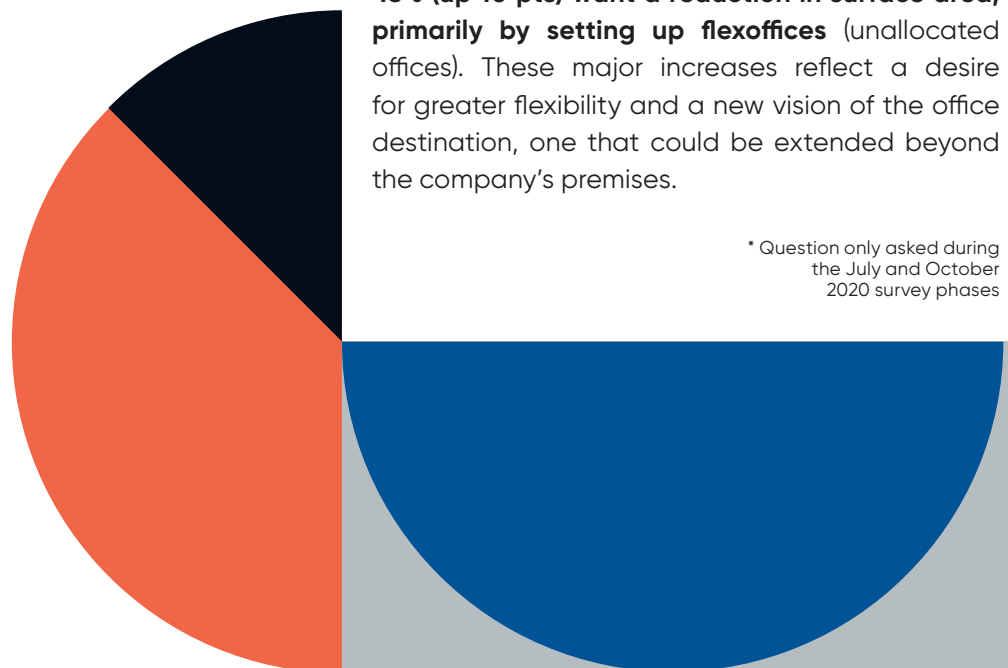
- **Flexibility is mostly called for as a priority lever by the youngest employees aged 18-34 (33% vs. 22% of employees aged 50 and over).**
- **The oldest employees prioritise work climate (26% vs. 14% of the youngest employees).**

A need to rethink the "office destination"

Looking beyond short-term factors, employees expect and await in-depth changes to their workspaces. Indeed, employees confirm the importance of place and relationships, i.e. the social and collective aspects of their work environment: **first, 66% (up 6 pts*) mention the need to allocate more space to social areas and postures in order to work differently.** Second, they mention a desire to reduce the density of workspaces (60%, up 9 pts). Both aspects illustrate a new attitude towards the workspace as a place; it is no longer a workstation in the strict sense, but rather a shared and diversified space in its daily forms.

Meanwhile, **46% (up 6 pts) expect the development of alternative solutions such as coworking, while 45% (up 10 pts) want a reduction in surface area, primarily by setting up flexoffices** (unallocated offices). These major increases reflect a desire for greater flexibility and a new vision of the office destination, one that could be extended beyond the company's premises.

* Question only asked during the July and October 2020 survey phases





transforming real estate: are top managers taking heed?





Before, during or after lockdown... real estate remains key for top managers

In terms of both location and quality of premises, over the long-term real estate remains key for a company's image among customers and potential employees. **93% claim their company pays a lot of attention to the quality of employee workspaces**, while 87% say this impacts their company's image and 81% say this impacts their capacity to attract new talents.

Future employees' views on workspaces are increasingly important

The survey reveals that we have reached a tipping point where the quality of workspaces and services that companies provide will play **a more important role in attracting potential employees (46%, up 4 pts) than in influencing their image among customers (39%, down 7 pts).**

- **This new attitude primarily relates to large companies with over 1,000 employees: 58% say this will have a bigger impact over the coming years on their appeal to future employees (vs. 43% of smaller companies).**

Home office, the new standard

The proportion of companies offering home office to their employees increased by 24 points over the 9-month survey period (from 55% to 79%). **Out of the 79% of companies offering such arrangements, 18% offer them to all employees and 61% only to some.**

- **A higher proportion of large companies offer employees work-from-home arrangements: 90% (vs. 77% of smaller companies), of which 65% only to some.**





Fundamental changes in the pipeline

Top managers too seek major changes in workspaces to reduce surface area and, above all, to boost flexibility and transform their real estate. **70% of them say they want to make alterations to enhance their real estate.**

To the question about planned real estate changes, **46% (stable) replied that they want to expand social areas and alternative work postures, this being the most common response.** 39% (up 3 pts) also plan to reduce workspace density at a time of social distancing and other preventive measures.

Both changes are doubtlessly made possible by **the introduction of a flex office system, which 38% (up 10 pts) regard as a high priority,** as well as the possibility of **offering alternative solutions such as coworking, cited as a high priority by 38% of directors (up 11 pts).**

- **Large companies with at least 1,000 employees were more interested in introducing a flex office system to reduce surface area and tackle problems of space. This was the most frequently mentioned change among large companies: 49% (vs. 36% in those smaller companies).**

These changes envisaged by top managers are intended to meet their demand for stronger performance in both economical and collective terms.

The changes will also enhance flexibility and will strengthen and social and hybrid vocation of the office by redefining workspaces.

* Question only asked during the July and October 2020 survey phases

methodology

Employees

3 phases to survey a representative sample of French private sector employees at companies with at least 250 employees:

—
PHASE 1: 1,034 employees from companies employing at least 250 people

—
PHASE 2: 1,000 employees from companies employing at least 250 people

—
PHASE 3: 1,001 employees from companies employing at least 250 people

Quota sampling method adopted taking account of employee gender, age, pay level, business sector and home region.

Interviews were carried out:

—
PHASE 1: 27 January to 7 February 2020

—
PHASE 2: 19 to 24 July 2020

—
PHASE 3: 9 to 16 September 2020

Directors

3 phases to survey a representative sample of French private sector directors at companies with at least 250 employees:

—
PHASE 1: 401 directors of companies employing at least 250 people

—
PHASE 2: 401 directors of companies employing at least 250 people

—
PHASE 3: 402 directors of companies employing at least 250 people

Quota sampling method adopted taking account of director business sector, company size and region.

Interviews were carried out:

—
PHASE 1: 27 January to 20 February 2020

—
PHASE 2: 16 June to 16 July 2020

—
PHASE 3: 14 September to 12 October 2020

Employees were interviewed by self-administered questionnaire in line with the CAWI (Computer Assisted Web Interview) system. Top managers were interviewed by self-administered questionnaire in line with the CATI (Computer Assisted Telephone Interview) system. And the margins of error: 2.1 to 4.9 points at most for a sample of 400 respondents. OpinionWay conducted this survey applying ISO 20252 procedures and rules. The survey's results should be read taking account of a margin for error: 1.5 to 3 percentage points for a sample of 1,000 respondents.

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COVIVIO

COCREATE AND COANIMATE LIVING REAL ESTATE

Thanks to its partnering history, its real estate expertise and its European culture, Covivio is inventing today's user experience and designing tomorrow's city.

A preferred real estate player at the European level, Covivio is close to its end users, capturing their aspirations, combining work, travel, living, and co-inventing vibrant spaces.

A benchmark in the European real estate market with 25 Bn€ in assets, Covivio offers support to companies, hotel brands and territories in their pursuit for attractiveness, transformation and responsible performance. Furthermore, its living, dynamic approach opens up exciting project and career prospects for its teams.

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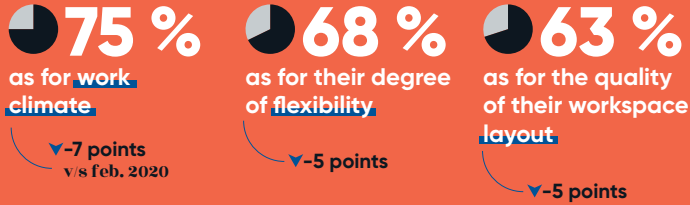
[covivio.eu](https://www.covivio.eu)

Tomorrow's offices: flexibility first!

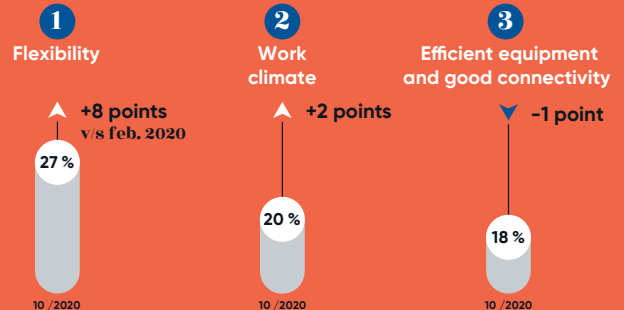
An OpinionWay survey for Covivio

Flexibility and a reinvented "office destination": employees' expectations

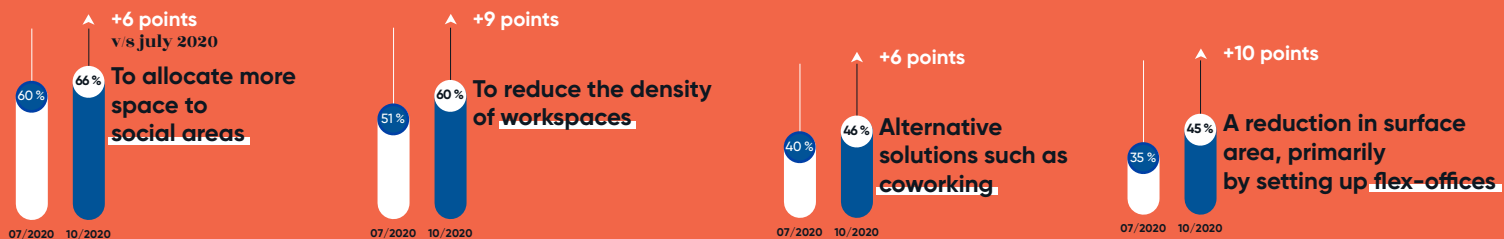
An impacted level of satisfaction by the context:



Items to be changed to improve the working environment:



Changes expected by employees

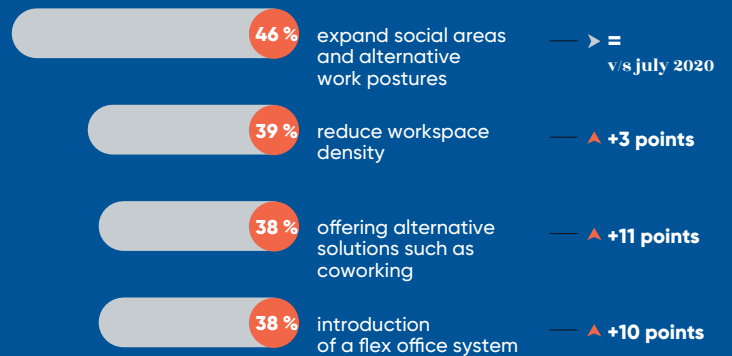


Are top managers taking heed?

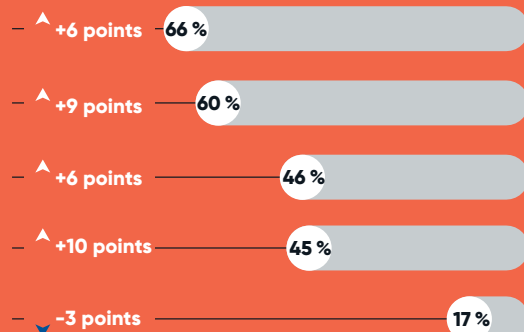
Thus, they plan to carry out the following improvements:

93% of top managers claim their company pays a lot of attention to the quality of employee workspaces

81% of top managers evoke the importance of the quality of their offices to attract new talents



Employees
What do you expect?

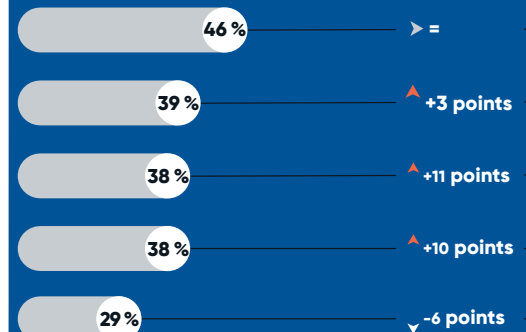


Comparative opinion of employees and top managers' expectations regarding workspaces

- Expand social areas and alternative work postures to work differently
- Reduce workspace density (workstations, meeting rooms)
- Offering alternative solutions such as coworking
- Introduction of a flex office system
- Nothing



Top Managers
What are you planning to do?



COVIVIO + "opinionway"

Study carried out from February to October 2020 in 3 waves of survey, among a representative sample of French employees (1,000 people) and French company top managers (400 people) in the private sector, in companies with 250 or more employees.



SONDAGE OPINIONWAY
POUR COVIVIO

REGARD CROISÉ SALARIÉS
ET DIRIGEANTS

*Bureaux de demain :
flexibility first!*

OCTOBRE 2020

COVIVIO

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LA MÉTHODOLOGIE

COVIVIO

LA MÉTHODOLOGIE

Volet salariés



3 vagues d'interrogation d'un échantillon représentatif des Français salariés du secteur privé dans des entreprises de 250 salariés et plus :

- Vague 1 : **1034 salariés d'entreprises de 250 salariés et plus**
- Vague 2 : **1000 salariés d'entreprises de 250 salariés et plus**
- Vague 3 : **1001 salariés d'entreprises de 250 salariés et plus**

Echantillon constitué selon **la méthode des quotas**, au regard des critères de sexe, d'âge, de taille salariale, de secteur d'activité, et de région de résidence.



Chaque échantillon a été interrogé par **questionnaire auto-administré en ligne sur système CAWI** (Computer Assisted Web Interview).



Les interviews ont été réalisées :

- Vague 1 : **du 27 janvier au 7 février 2020**
- Vague 2 : **du 19 au 24 Juillet 2020**
- Vague 3 : **du 9 au 16 septembre 2020**

Pour les remercier de leur participation, les panélistes ont touché des incentives ou ont fait un don à l'association proposée de leur choix.



OpinionWay a réalisé cette enquête en appliquant les procédures et règles de la **norme ISO 20252**.



Les résultats de ce sondage doivent être lus en tenant compte des marges d'incertitude : 1,5 à 3 points au plus pour un échantillon de 1000 répondants.

LA MÉTHODOLOGIE

Volet dirigeants



3 vagues d'interrogation d'un échantillon représentatif des dirigeants d'entreprises de 250 salariés et plus :

- Vague 1 : **401 dirigeants d'entreprises de 250 salariés et plus**
- Vague 2 : **401 dirigeants d'entreprises de 250 salariés et plus**
- Vague 3 : **402 dirigeants d'entreprises de 250 salariés et plus**

Echantillon constitué selon la **méthode des quotas**, au regard des critères de secteur d'activité, de taille d'entreprise, et de région.



Chaque échantillon a été interrogé par **questionnaire auto-administré en ligne sur système CATI** (Computer Assisted Telephone Interview).



Les interviews ont été réalisées :

- Vague 1 : **du 27 janvier au 20 février 2020**
- Vague 2 : **du 16 juin au 16 juillet 2020**
- Vague 3 : **du 14 septembre au 12 octobre 2020**



OpinionWay a réalisé cette enquête en appliquant les procédures et règles de la **norme ISO 20252**.



Les résultats de ce sondage doivent être lus en tenant compte des marges d'incertitude : 2,1 à 4,9 points au plus pour un échantillon de 400 répondants.

Toute publication totale ou partielle doit impérativement utiliser la mention complète suivante :

« **Sondage OpinionWay pour Covivio** »

et aucune reprise de l'enquête ne pourra être dissociée de cet intitulé.

LE PROFIL DES SALARIÉS INTERROGÉS

Population française âgée de 18 ans et plus.

Source : INSEE, Bilan démographique 2015.

| Sexe | % |
|--------|-----|
| Hommes | 52% |
| Femmes | 48% |

| Age | % |
|----------------|-----|
| 18-24 ans | 6% |
| 25-34 ans | 26% |
| 35-49 ans | 42% |
| 50 ans et plus | 26% |

| Activité professionnelle | % |
|---|-----|
| Cadres, professions intellectuelles supérieures | 33% |
| Professions intermédiaires | 37% |
| Employés | 30% |

| Secteur | % |
|--|-----|
| Industrie et BTP | 20% |
| Commerces, transports, hébergement et restauration | 15% |
| Services | 65% |

| Taille d'entreprise | % |
|------------------------|-----|
| De 250 à 999 salariés | 41% |
| 1 000 salariés et plus | 59% |

LE PROFIL DES DIRIGEANTS INTERROGÉS

Dirigeants d'entreprises de 250 salariés et plus.

Source : Fichier SIRENE.

| Taille d'entreprise | % |
|-----------------------|-----|
| De 250 à 999 salariés | 91% |
| 1000 salariés et plus | 9% |

| Région | % |
|---------------|-----|
| Ile-de-France | 35% |
| Nord-ouest | 20% |
| Nord-est | 19% |
| Sud-ouest | 8% |
| Sud-est | 18% |

| Secteur | % |
|------------------|-----|
| Industrie et BTP | 33% |
| Commerce | 25% |
| Services | 42% |

LES RÉSULTATS

COVIVIO



VOLET SALARIÉS

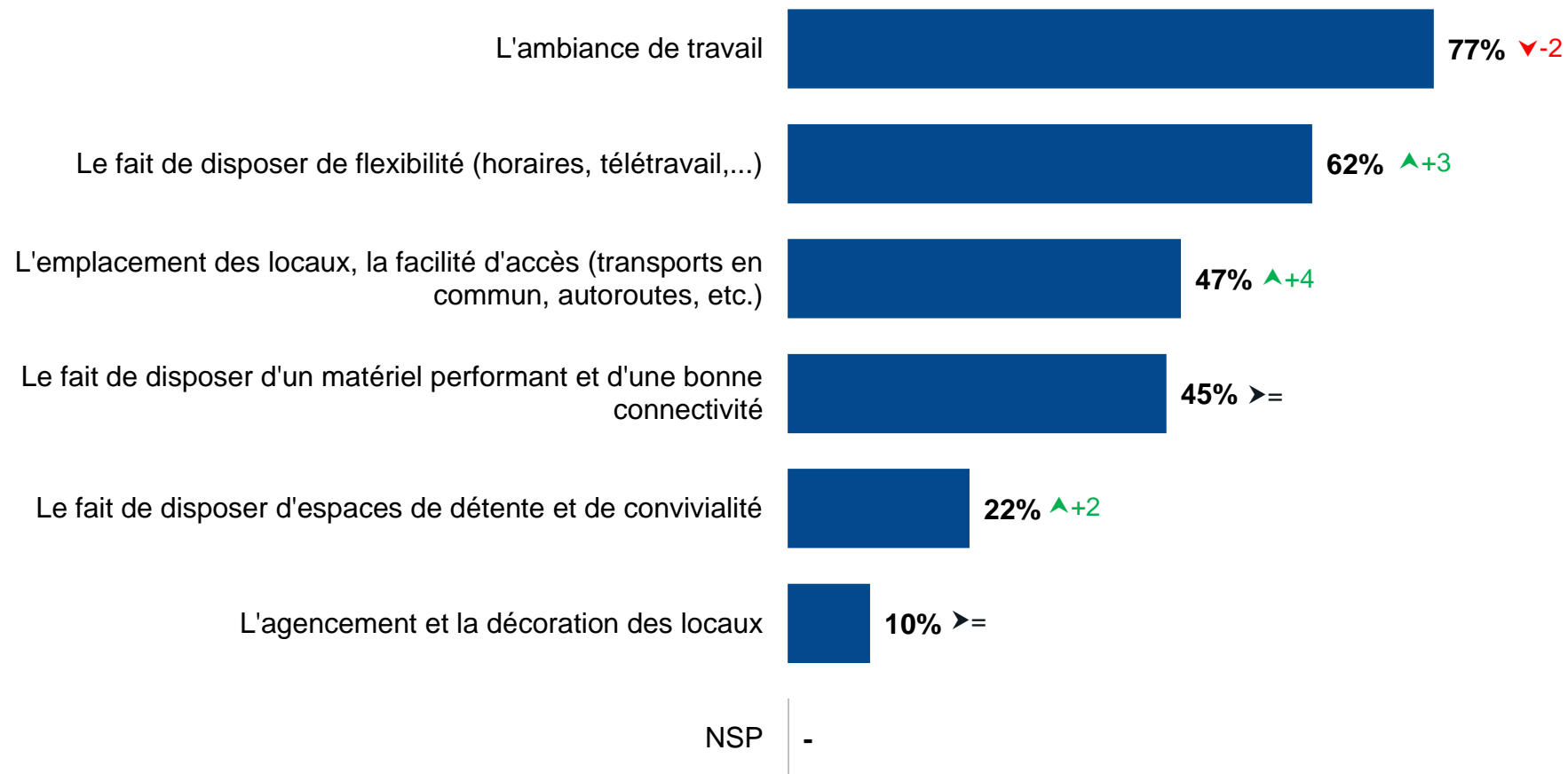
OCTOBRE 2020

COVIVIO

LES CRITÈRES DÉFINISSANT UN CADRE DE TRAVAIL AGRÉABLE

Q. Quels sont pour vous les critères qui définissent un cadre de travail agréable ?

Plusieurs réponses possibles - Total supérieur à 100%

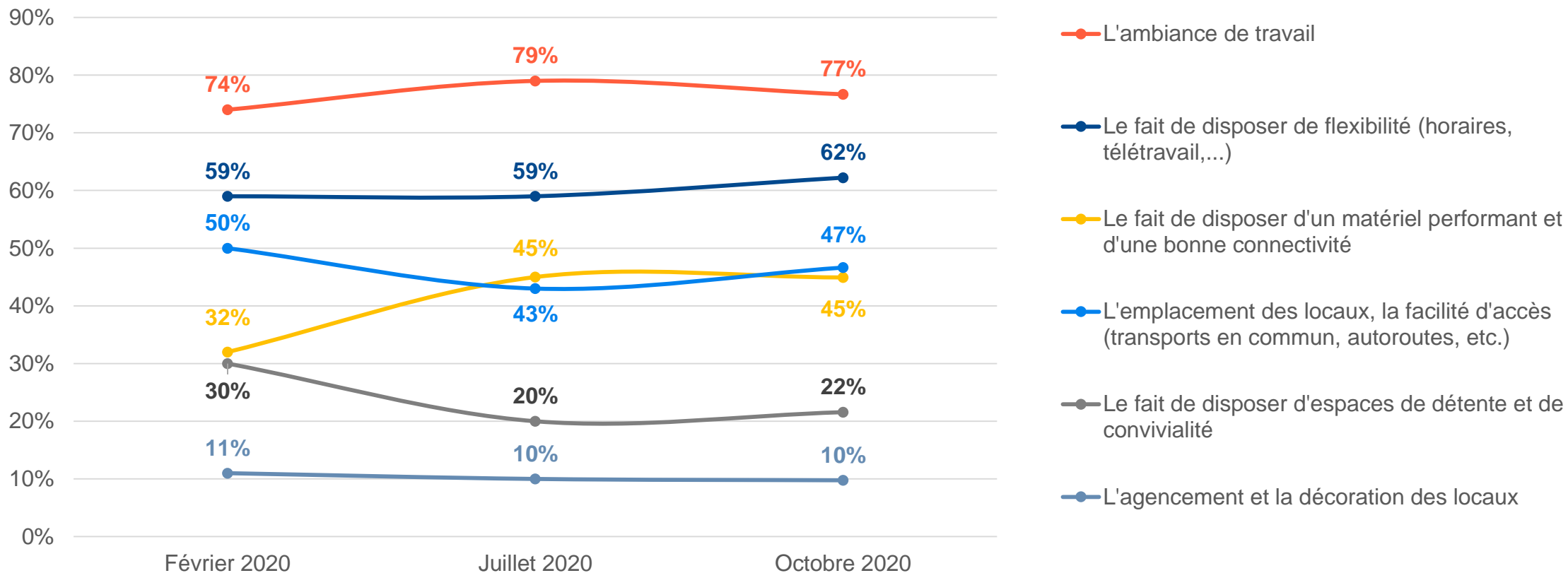


▼ / ▲ Evolutions par rapport à « Immobilier de bureau – regard croisé salariés et dirigeants - vague 2 » (juillet 2020).

LES CRITÈRES DÉFINISSANT UN CADRE DE TRAVAIL AGRÉABLE

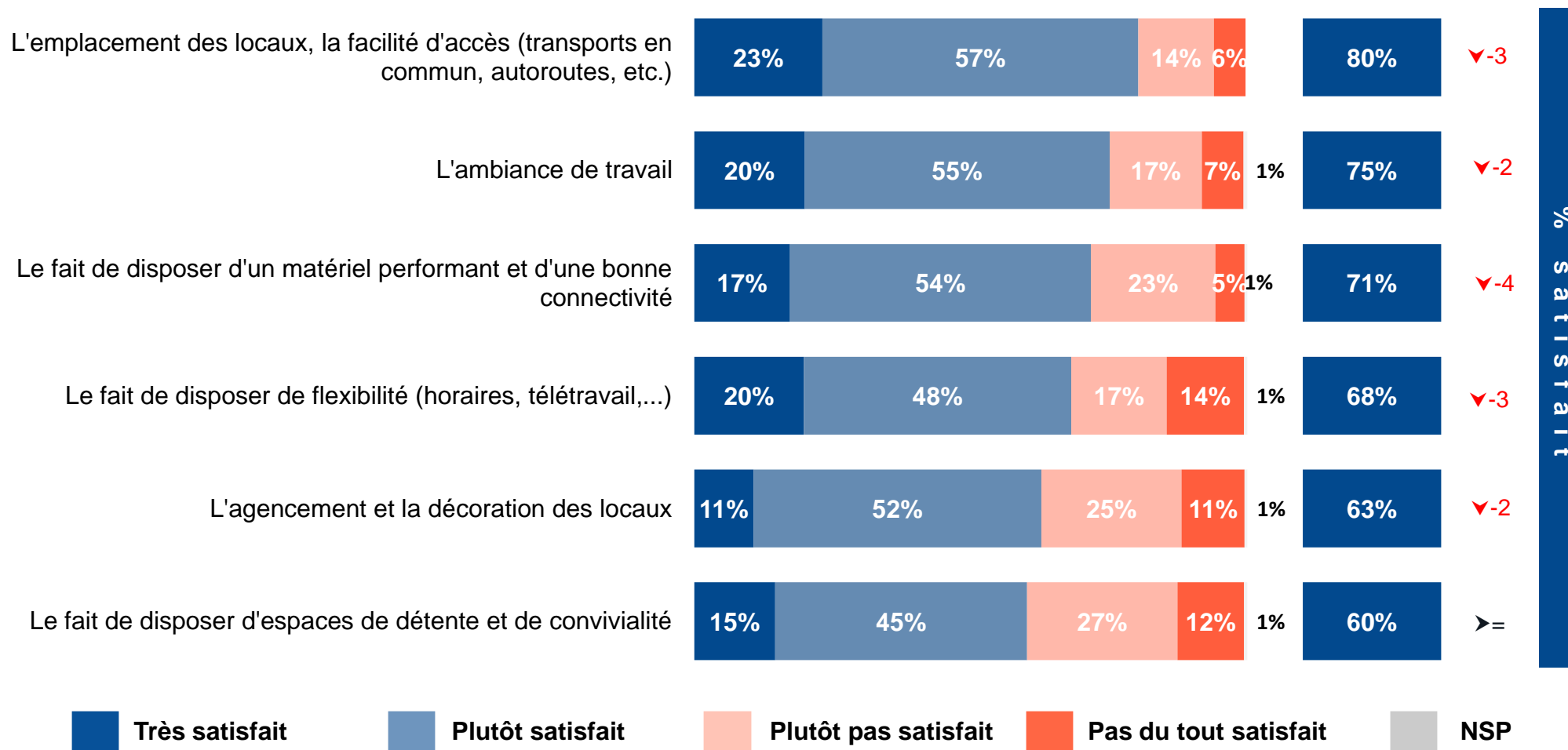
Q. Quels sont pour vous les critères qui définissent un cadre de travail agréable ?

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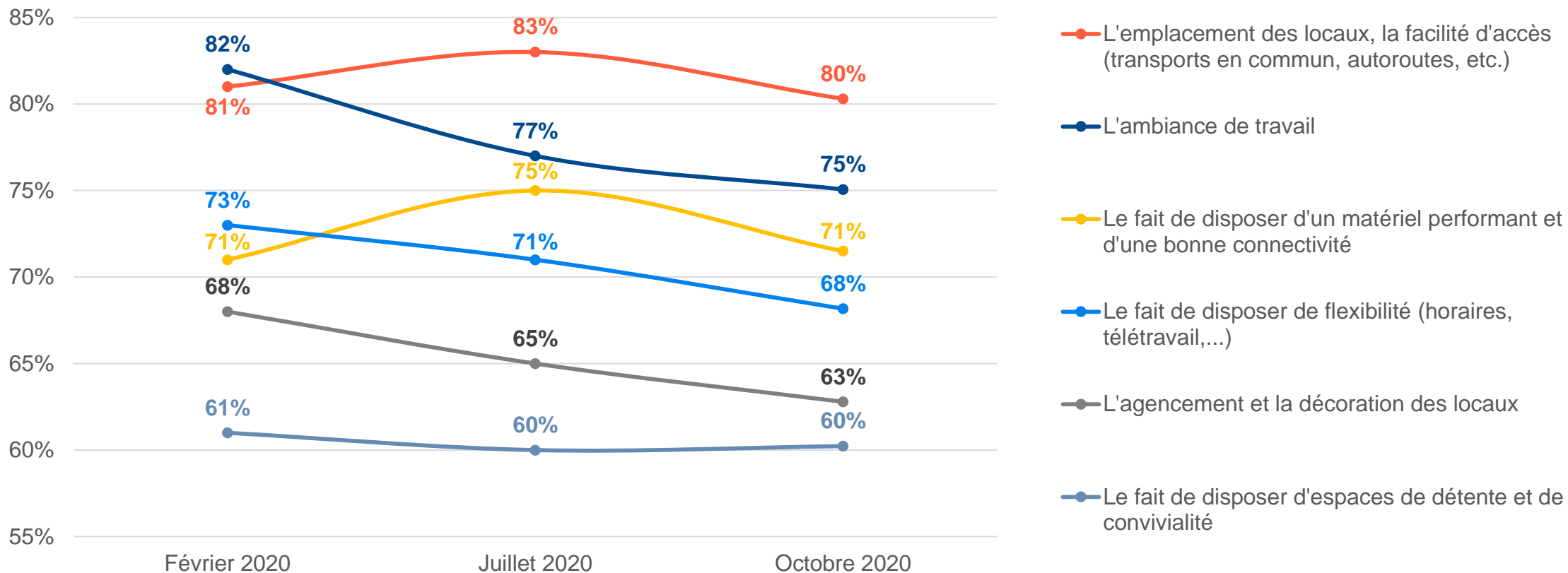
LA SATISFACTION DÉTAILLÉE À L'ÉGARD DU CADRE DE TRAVAIL

Q. Vous personnellement, êtes-vous satisfait ou pas satisfait de chacun des éléments suivants de votre cadre de travail ?



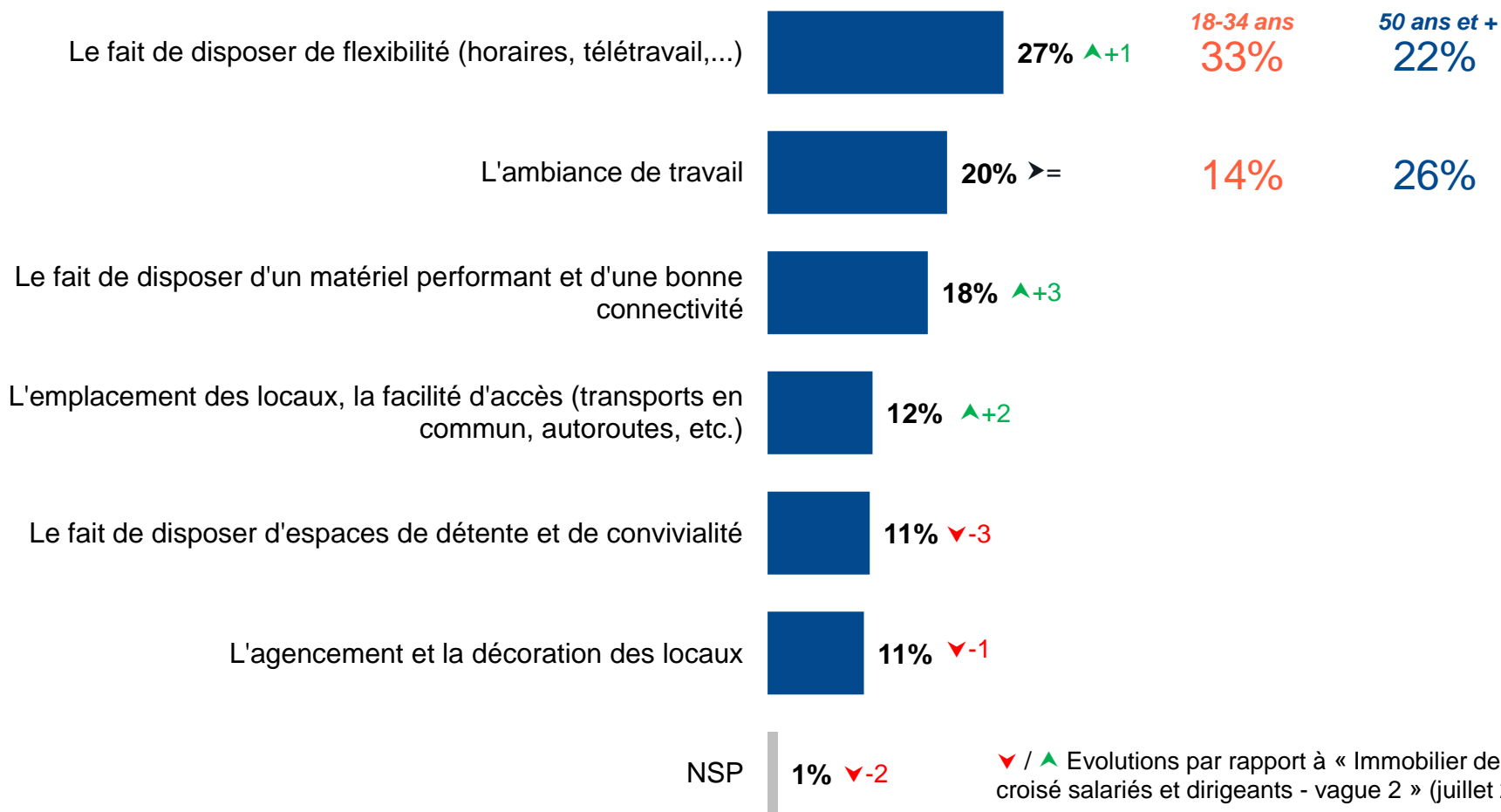
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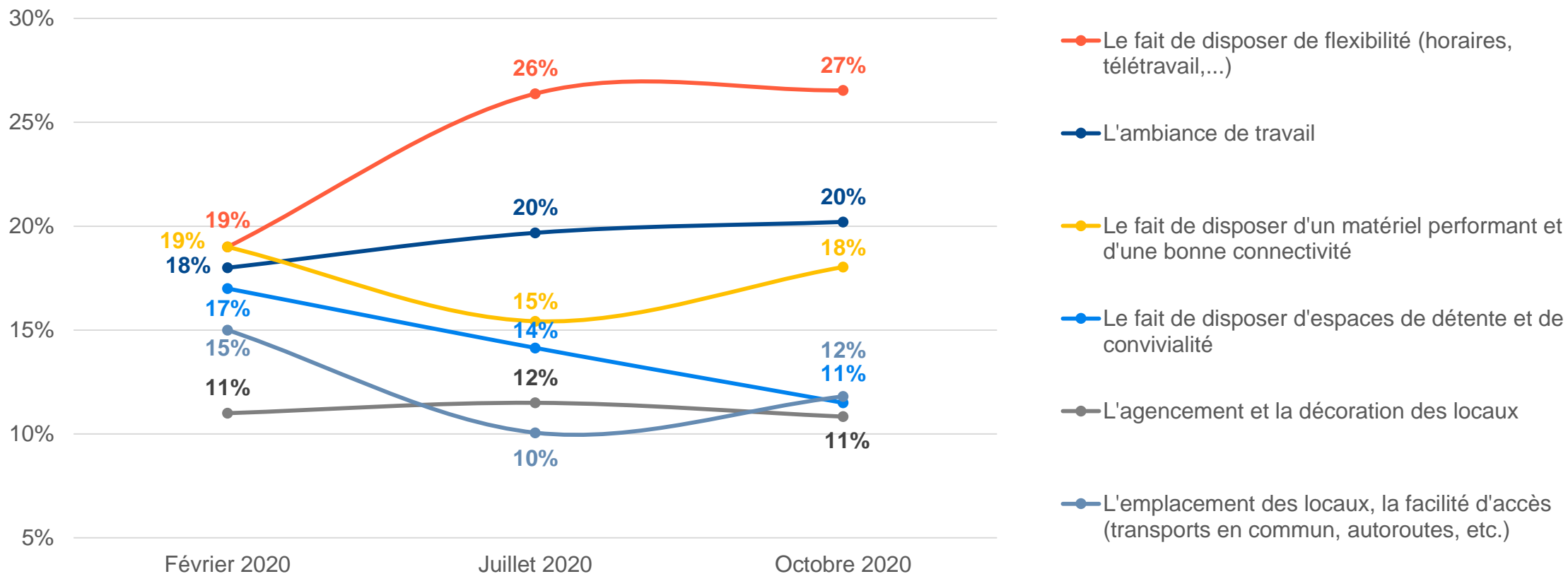
LES ÉLÉMENTS À CHANGER EN PRIORITÉ POUR AMÉLIORER LE CADRE DE TRAVAIL

Q. Et selon vous que faudrait-il changer en priorité pour que votre cadre de travail s'améliore ?



LES ÉLÉMENTS À CHANGER EN PRIORITÉ POUR AMÉLIORER LE CADRE DE TRAVAIL

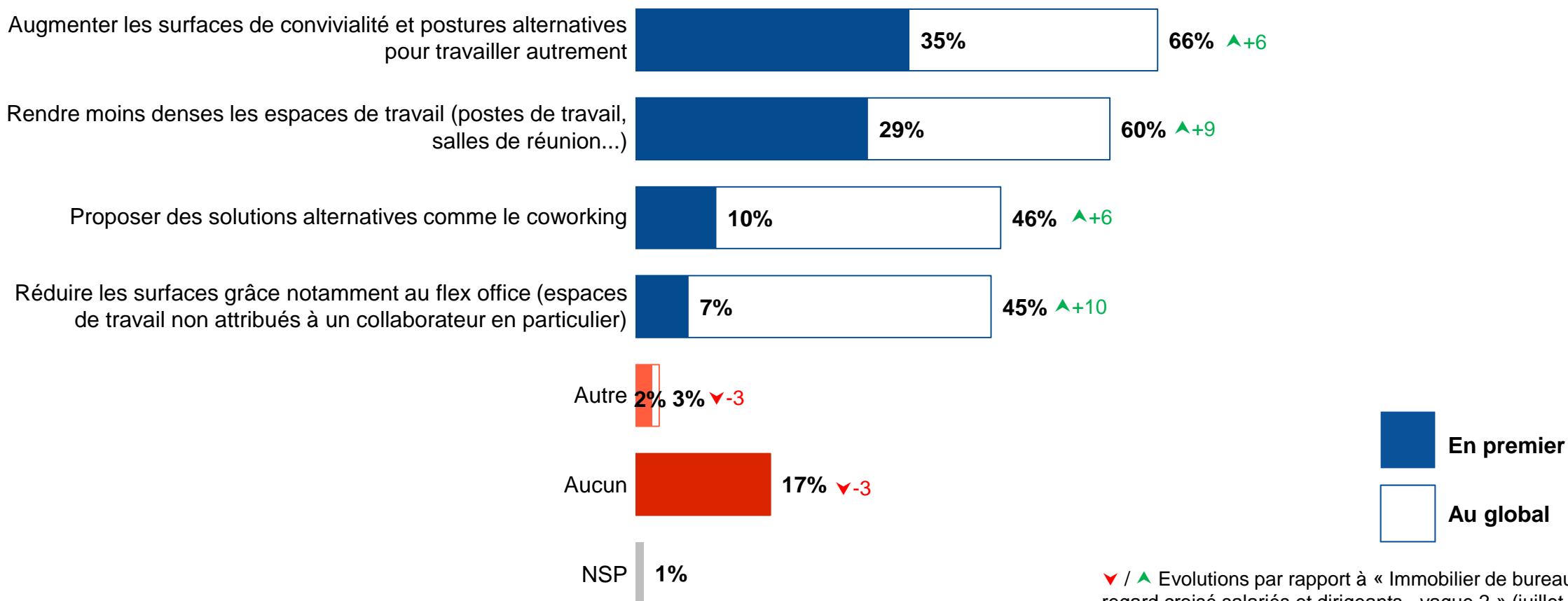
Q. Et selon vous que faudrait-il changer en priorité pour que votre cadre de travail s'améliore ?



LES ATTENTES EN MATIÈRE D'AMÉNAGEMENT DES ESPACES DE TRAVAIL

Q. Qu'attendez-vous de votre entreprise en termes d'aménagement des espaces de travail ? Merci de classer vos attentes par ordre de priorité.

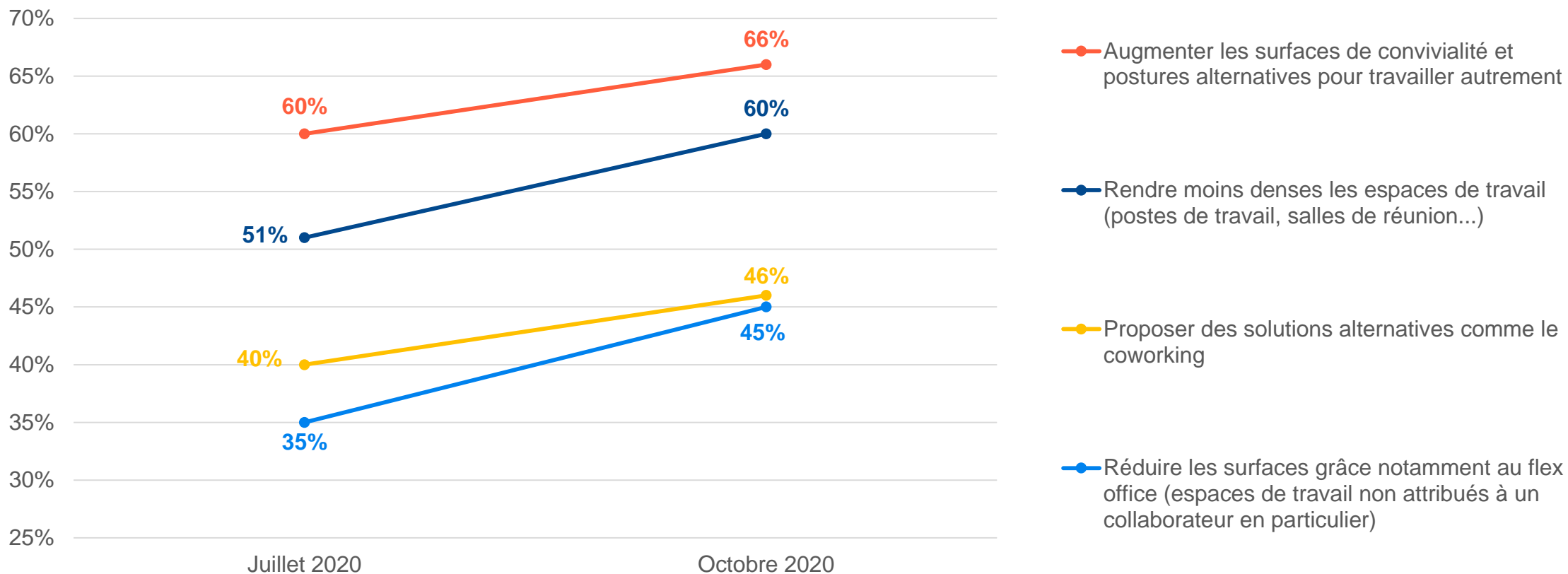
En premier ? Et ensuite ?



LES ATTENTES EN MATIÈRE D'AMÉNAGEMENT DES ESPACES DE TRAVAIL

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En premier ? Et ensuite ?





VOLET DIRIGEANTS

OCTOBRE 2020

COVIVIO

VOLET SALARIÉS

VOLET DIRIGEANTS

LA QUALITÉ DES ESPACES DE TRAVAIL

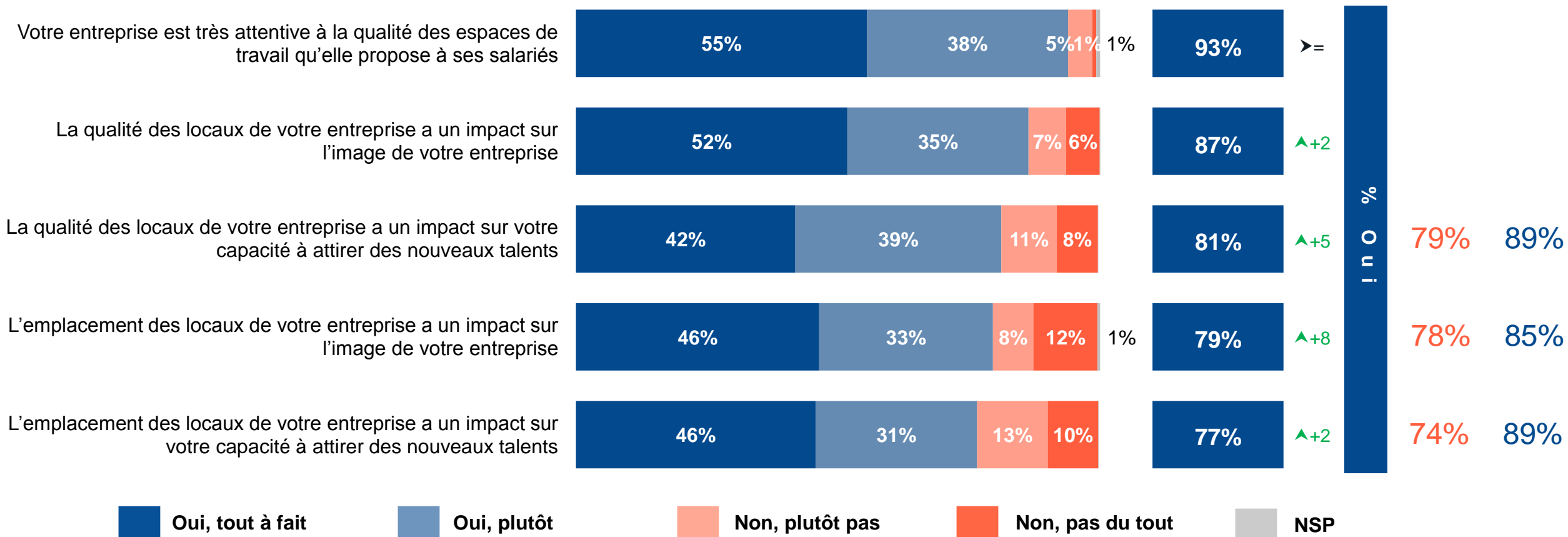
Q. Vous personnellement, diriez-vous que... ?



250-999
salariés

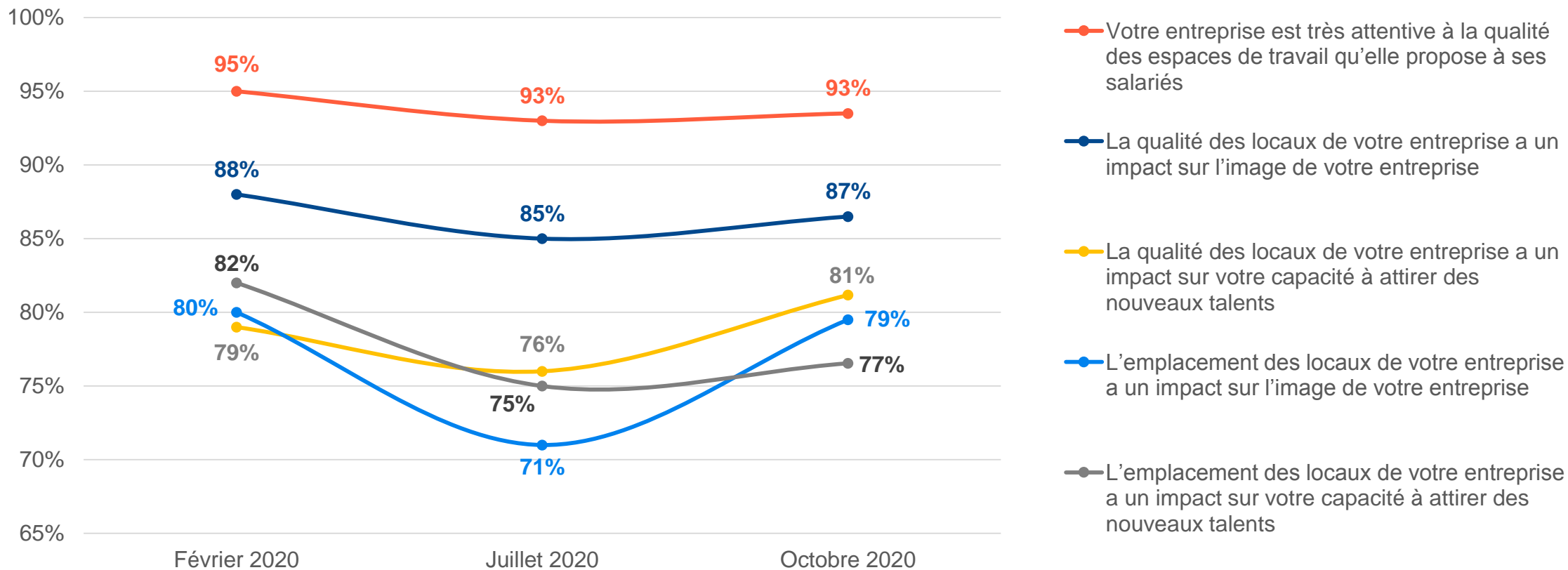


1000
salariés et
plus



LA QUALITÉ DES ESPACES DE TRAVAIL

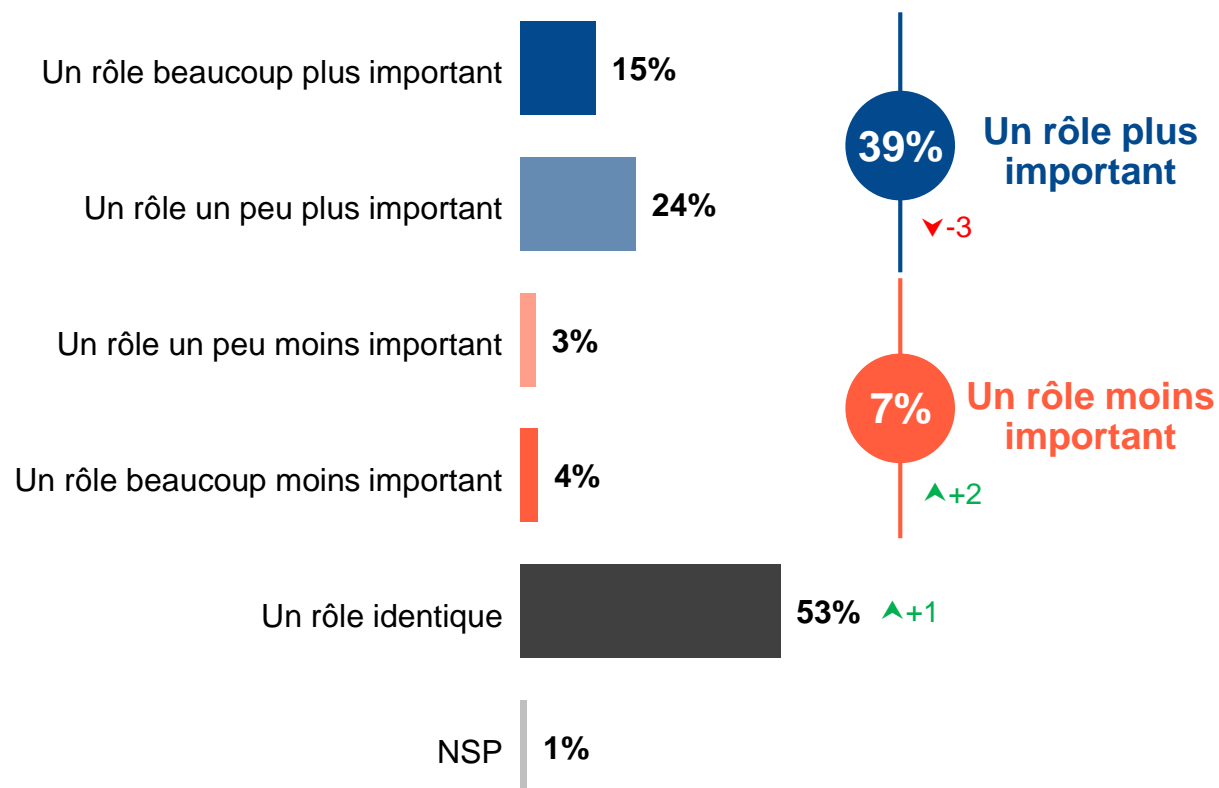
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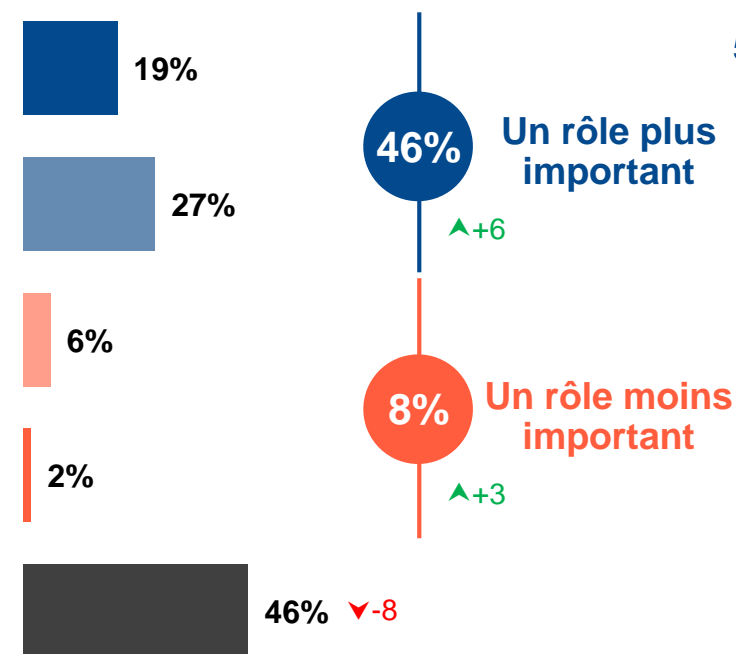
LE RÔLE DES ESPACES DE TRAVAIL DANS LES ANNÉES À VENIR

Q. Dans les années qui viennent, estimez-vous que la qualité des espaces et des services proposés par votre entreprise jouera un rôle plus important, moins important ou identique en ce qui concerne...?

L'image de votre entreprise auprès de ses clients



L'attractivité de votre entreprise auprès des salariés potentiels



1000 salariés et plus

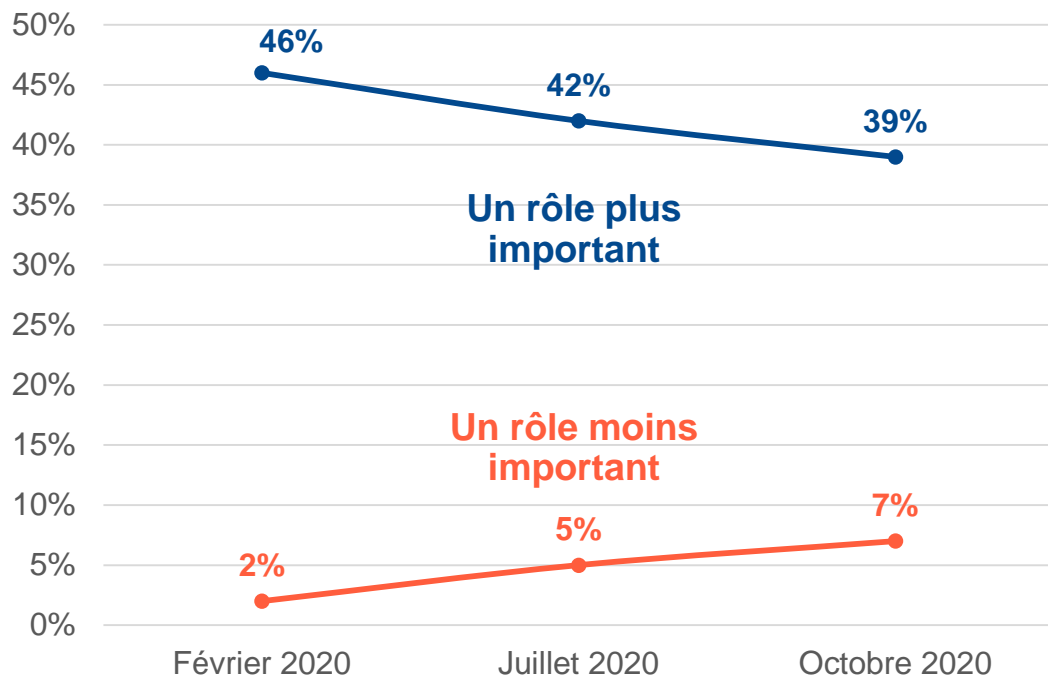
58%

▼ / ▲ Evolutions par rapport à «Immobilier de bureau – regard croisé salariés et dirigeants - vague 2 » (juillet 2020).

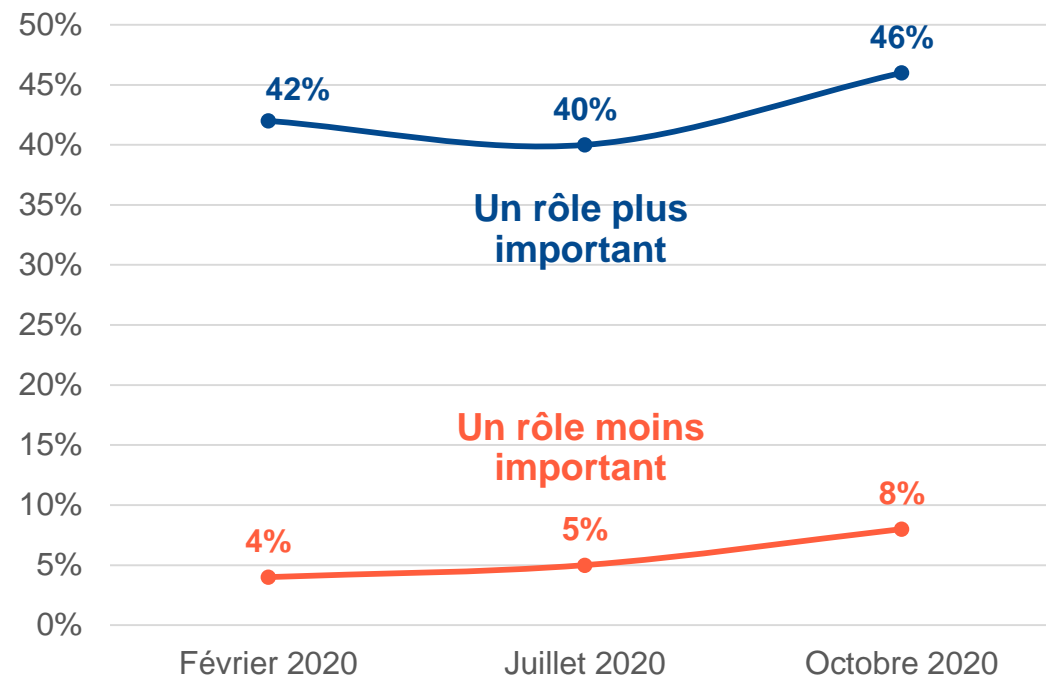
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L'image de votre entreprise auprès de ses clients



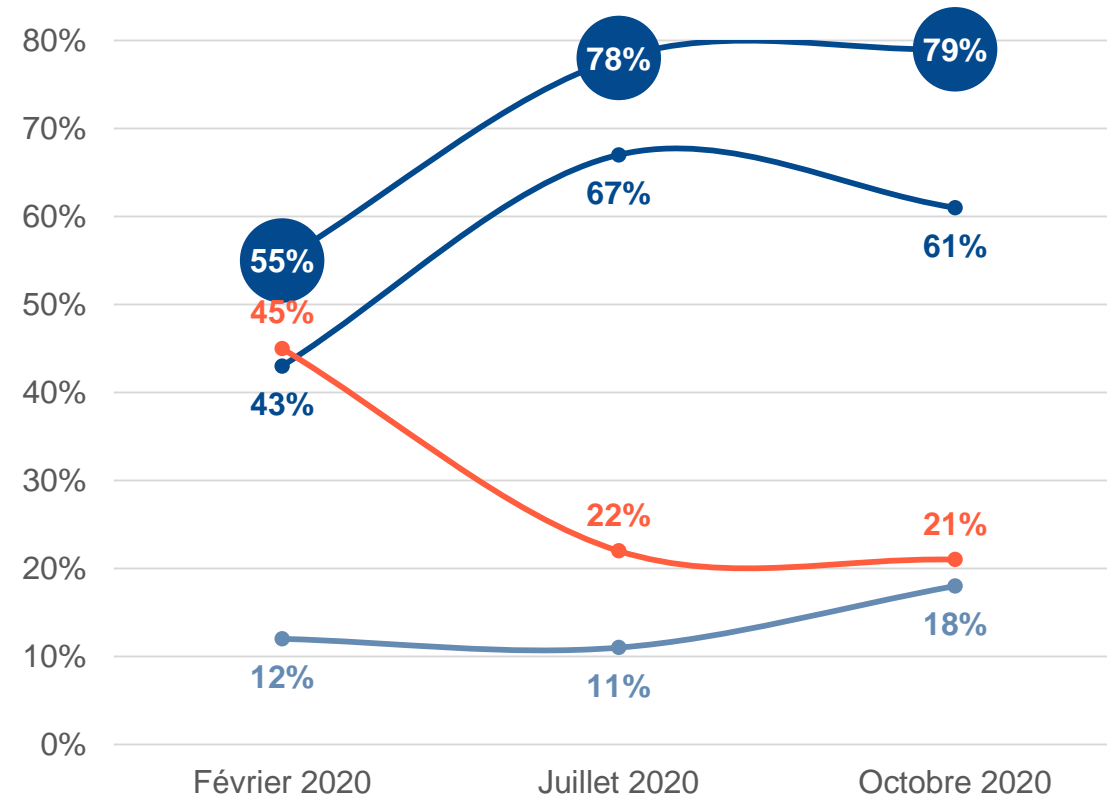
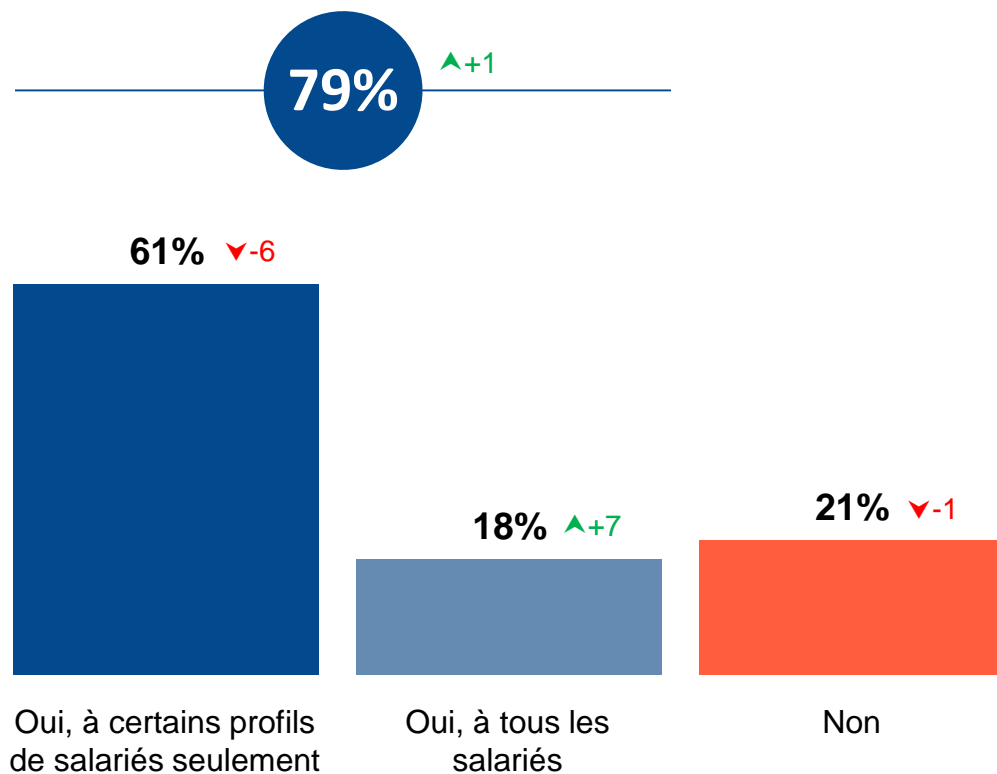
L'attractivité de votre entreprise auprès des salariés potentiels



LA POSSIBILITÉ OFFERTE AUX SALARIÉS DE FAIRE DU TÉLÉTRAVAIL

Q. Votre entreprise propose-t-elle à ses salariés la possibilité de faire du télétravail ?

Offrent à leurs salariés la possibilité de faire du télétravail

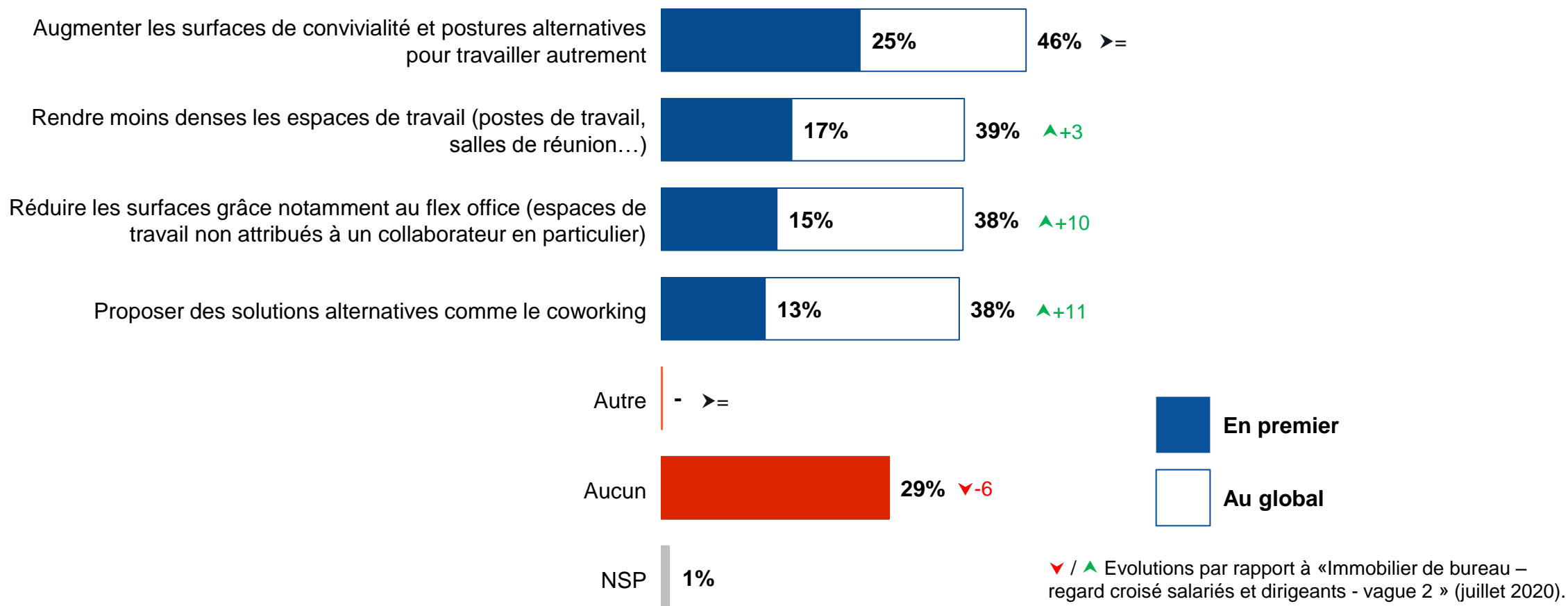


▼ / ▲ Evolutions par rapport à « Immobilier de bureau – regard croisé salariés et dirigeants - vague 2 » (juillet 2020).

LES AMÉNAGEMENTS PRÉVUS DES ESPACES DE TRAVAIL

Q. Parmi les aménagements suivants concernant les espaces de travail, quels sont ceux que vous comptez réaliser ? Merci de les classer par ordre de priorité.

En premier ? Et ensuite ?



LES AMÉNAGEMENTS DES ESPACES DE TRAVAIL COMPARAISON SALARIÉS – DIRIGEANTS

Q. Qu'attendez-vous de votre entreprise en termes d'aménagement des espaces de travail ? Merci de classer vos attentes par ordre de priorité.

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En premier ? Et ensuite ?

