

GENERATIONS CHOOSE DESTINATIONS

Return to Office 2023

REPORT

Romania
REAL ESTATE
CBRE RESEARCH





Contents

- 01 Prerequisites
- 02 General Overview
- 03 Generation Z – Post Millennials
- 04 Generation Y – Millennials
- 05 Generation Z – Pre-millennials
- 06 Generation Baby Boomers
- 07 Key Findings

“

The workplace, the workspace and the working process as a whole are found in a transformational moment, after more than three years since the pandemic's outburst. This special report summarises the new way of working through employees' lens as well their expectations for a new and improved office space.

In an attempt to better understand what it takes for employees to return to office, we analysed their working week patterns, what they would improve and what matters most for their well-being in and out of the office. We spiced the survey's outcomes by analysing the answers considering the four working generations and results unveiled the generational hiatus. But let's find out more together!

”



Daniela Gavril
Head of Research,
CBRE Romania

01

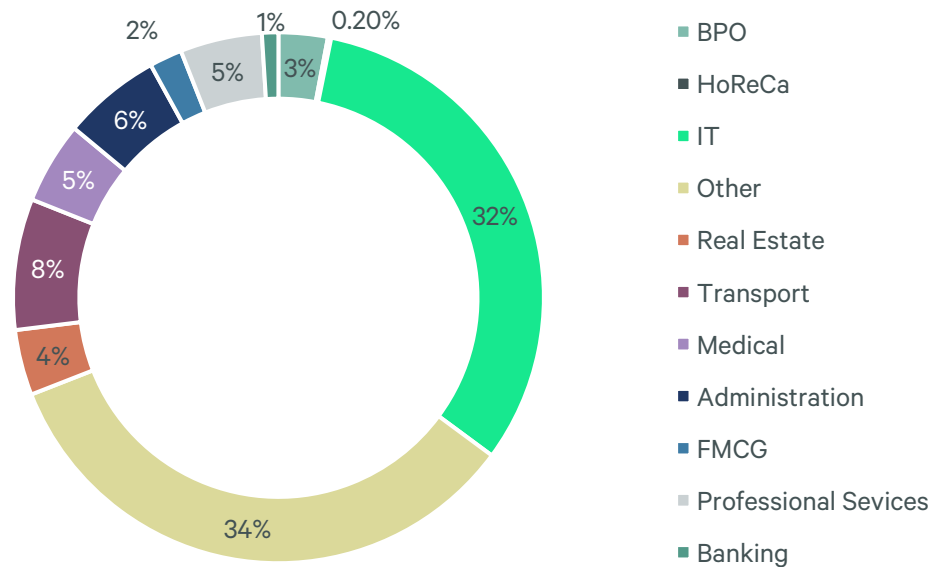
Prerequisites

Prerequisites

CBRE Research Romania conducted a survey among employees in September 2023 in order to better understand the perception of employees from different domains of activity in regard to work from home versus work from the office. The special twist of this report is the results analysis considering the age category of respondents, envisioned as ambassadors of their generations.

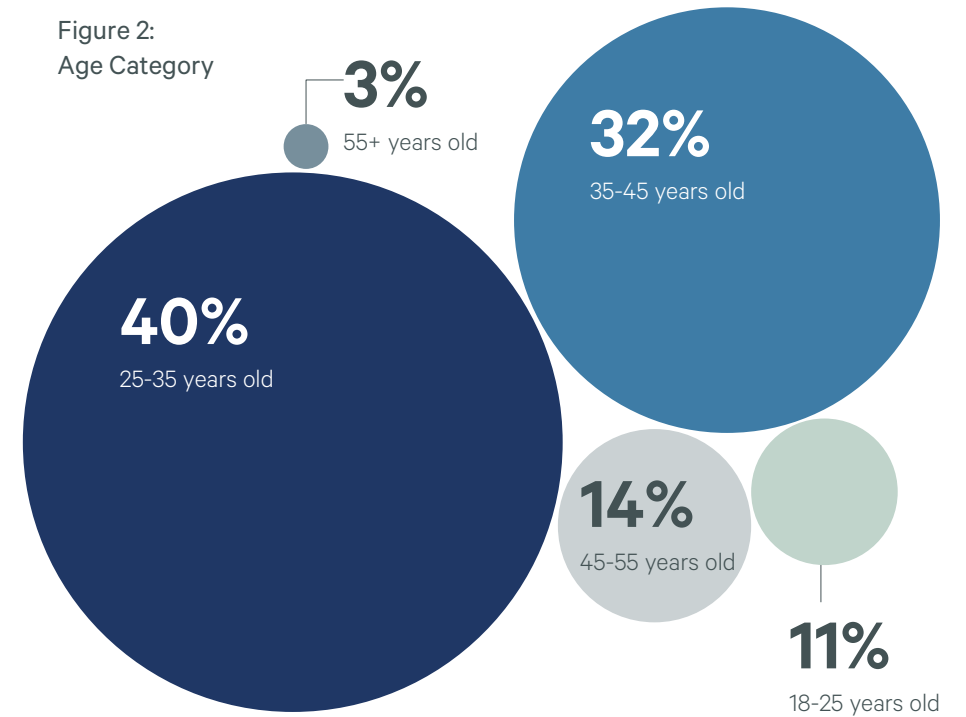
Completed by almost 500 respondents, the survey covered the vision of employees from nine different fields such as IT, Transport, Administration, Medical, Professional Services, Real estate, BPO, FMCG, Banking, HoReCa plus Others.

Figure 1:
Where They
Work



Source: CBRE Research

Figure 2:
Age Category



The age category is the main filter we used to prepare the present report, to find out how different generations navigated the changes occurred in their work environment.

Thus, we have split the answers in 4 ranges of ages/categories:

- Generation Z
Post Millennials
18-25 years old
- Generation X
Pre-Millennials
45-55 years old
- Generation Y
Millennials
25-45 years old
- Generation Baby Boomers
55+ years old & older

Every generation has several main characteristics in terms of working habits and their attitude towards work, what we wanted to find out in this report is “Does these characteristics apply when it comes to returning to the office policy applied by most companies?” First, let us show you what we had in mind for each generation:



Generation Z Post Millennials

- Social and speed
- Multi-taskers
- Entrepreneurs
- Educated
- Digital Natives
- Less Focused



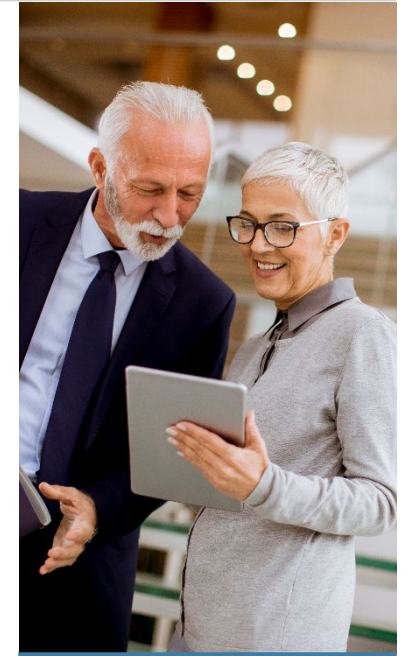
Generation Y Millennials

- Tech-savvy
- Optimistic
- Independent
- Determined
- Service-oriented
- Innovative thinkers



Generation X Pre-Millennials

- Skeptical
- Globally concerned
- Tech savvy
- Concerned about safety and security
- Flexible
- Individualistic



Generation Baby Boomers

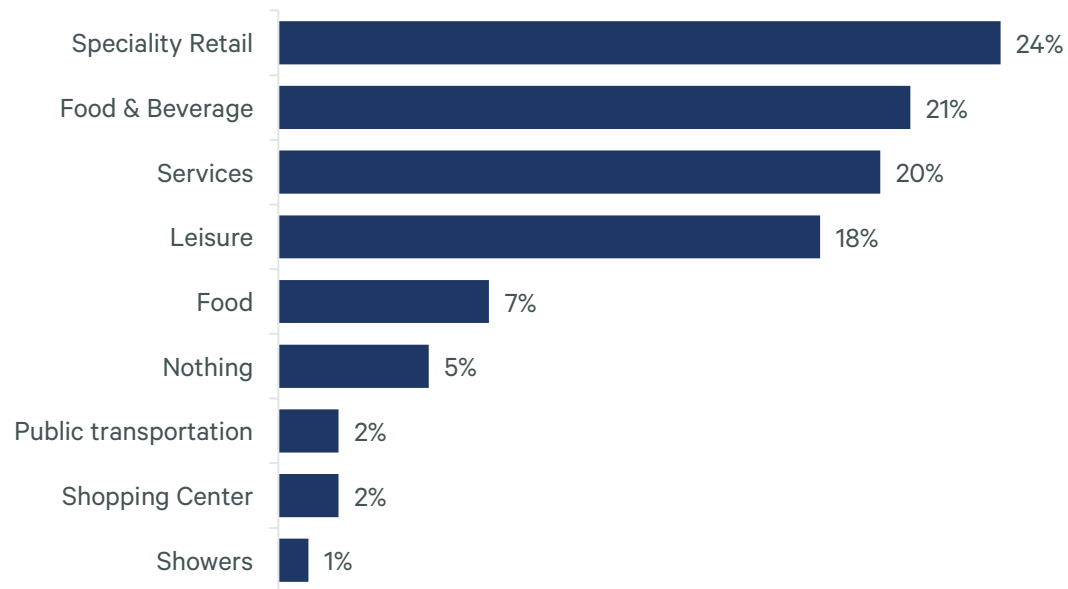
- Tolerant
- Self-sufficient
- Hardworking
- Disciplined
- Committed
- Team-player

Next to your office?

With an open question we wanted to find out what else would employees need next to their office. We analysed the answers considering the following categories:

- Food - comprising companies providing: Hypermarket / Supermarket, Special Food;
- Leisure - comprising companies providing: Cinema, Gym, Other Leisure;
- Food & Beverage - comprising companies providing: Coffee shop & Ice Cream, Fast Food, Restaurants;
- Services - comprising companies providing: Hairdresser's and beauty services, Other Services, Pets;
- Speciality Retail - comprising companies providing: Books / Cards / Stationery, Health, beauty & perfumery, Optician's & Pharmacy, Phone, Photo and Games, Speciality Gift, Toys;
- Public transportation – comprising any type of public transportation means;
- Shopping Centers – comprising shopping malls or retail parks;
- Showers – comprising office building facilities offered to tenants;
- Nothing

Figure 3: What would they bring to/near the office building they work to make life easier



Source: CBRE Research

The pool of answers showed that is all about **Creating their own synergy** – if the respondents could bring something near their office building in order to make going to the office a more enjoyable experience:

1/4 responses

A quarter of them would like speciality retail operators such as but not limited to Pharmacies, Beauty and Medical Clinics;

5% responses

wouldn't change a thing to their current office to make the journey easier.

02

General Overview

Work from the **office**

Employees Working Habits and Desires



Before splitting the answers by age category, we wanted to see the general sentiment, employees working habits and desires. Hereby, we present the survey's general outcomes:

49% of the respondents are working from the office for **more than three days per week**

17% answered that they go to the office **at least one day per week**

All Generations

Work from **home**

Employees Working Habits and Desires



When asked what days they would rather work from home:

43%

of answering employees stated they would **prefer to not be called to the office on Fridays**

All Generations

Figure 4: Working Days from the Office

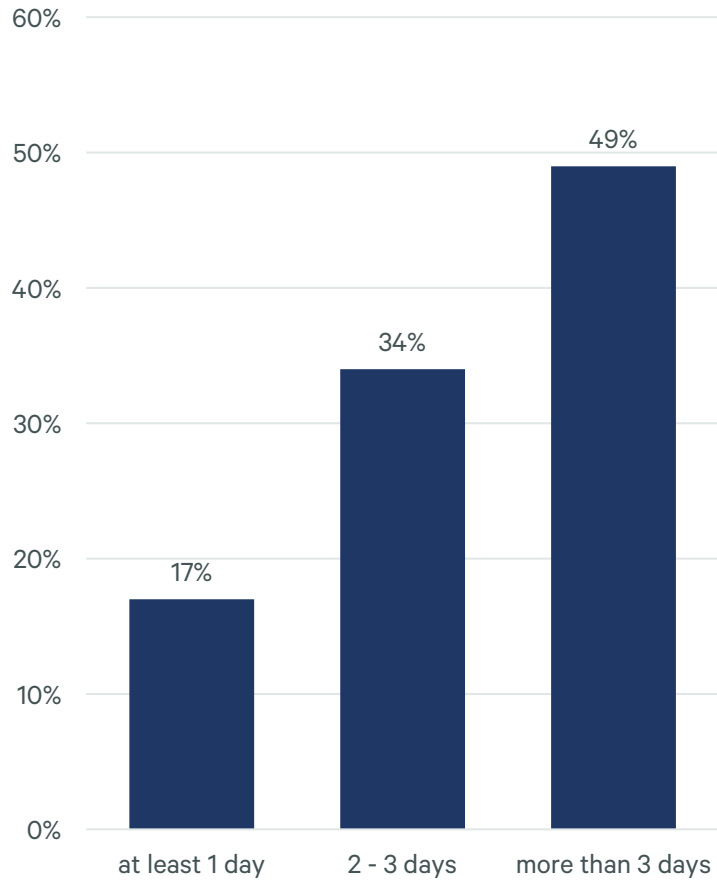
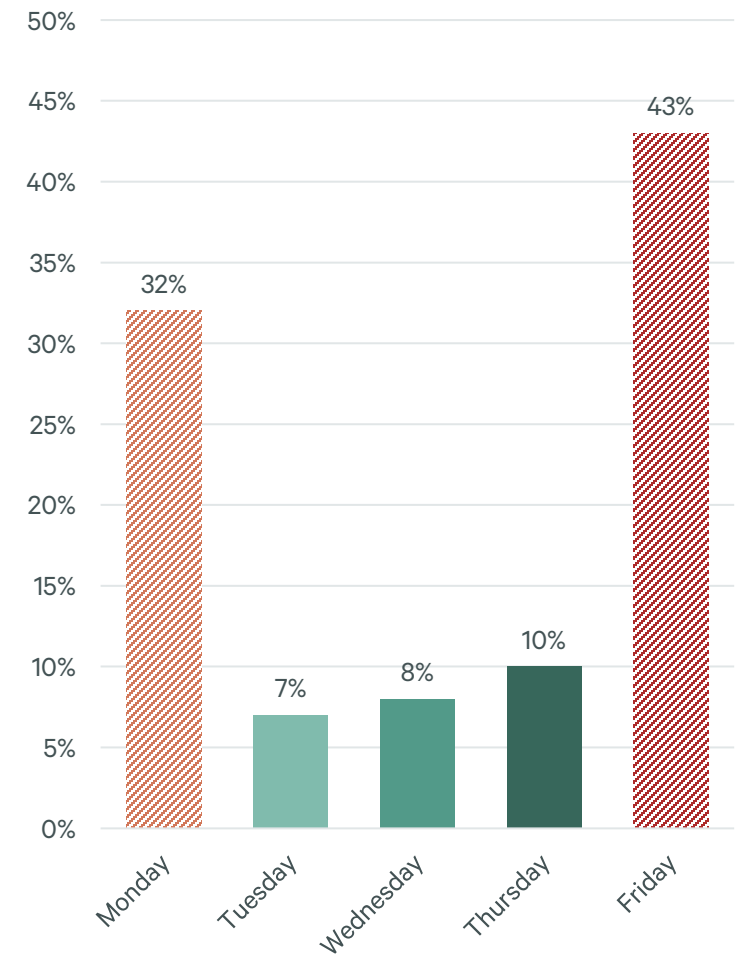


Figure 5: Preferred days NOT to be called to the office



Source: CBRE Research

All Generations



Public Transportation

Public transportation near the office is more important than a shopping center in the proximity.



70% of respondents prefer a **public transportation station nearby**

30% of respondents enjoy a **shopping spree near the workplace**

All Generations

Spending Quality Time After Work

Determine quality time after working hours. When asked what would prefer to do once their shift is over, friends versus gym time, friends were the lucky winners:

60%

of respondent employees selected **fun in the city with friends.**

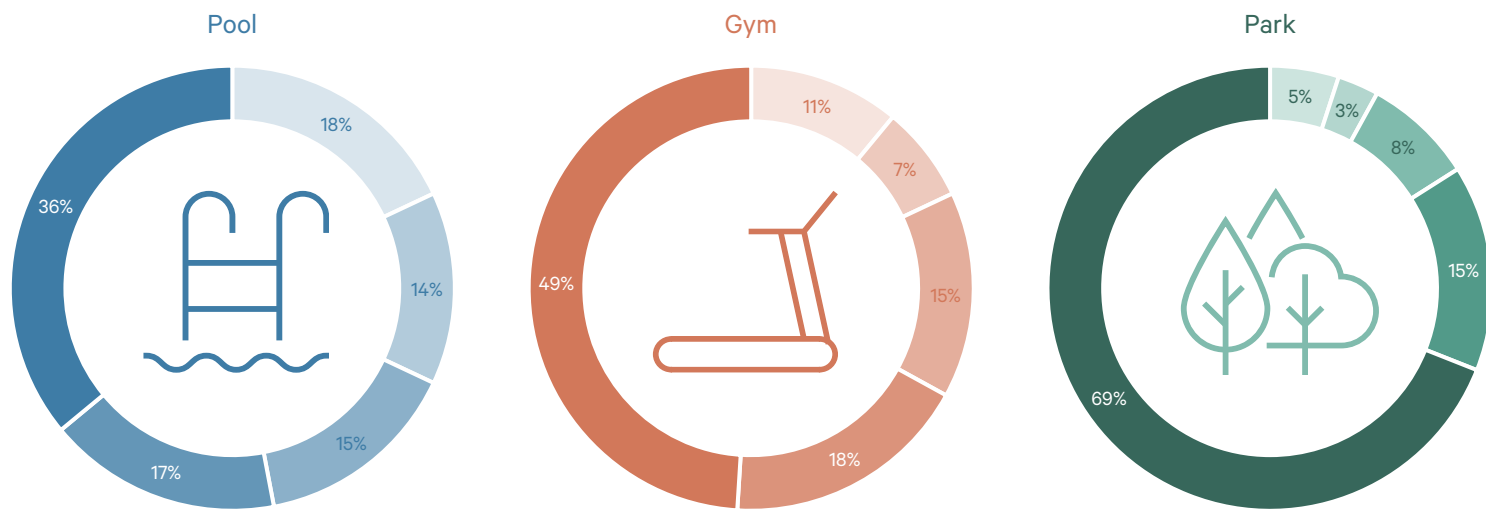
40%

of respondent employees choose **training at the gym**



All Generations

Location – the turning point in deciding what to do to relax after leaving the office.



Having the possibility to grade activities such as going to the gym, swimming or walking in the park, where 1 is the least preferable and 5 is the most desired:

a walk in the park

was considered **the most enjoyable thing to do after leaving the office**, as this activity received the largest number of votes 5-graded;

going for a swim

is **the least wanted activity** to relax after a long working day.

Figure 6: Important for the well-being to have facilities near the office



Source: CBRE Research

All Generations



Socializing, networking or partying at events organized in their own office building?

64%

More than half of respondents **accepted** the invitation to an event

33%

would participate if the event happens to take place **when they are at the office.**

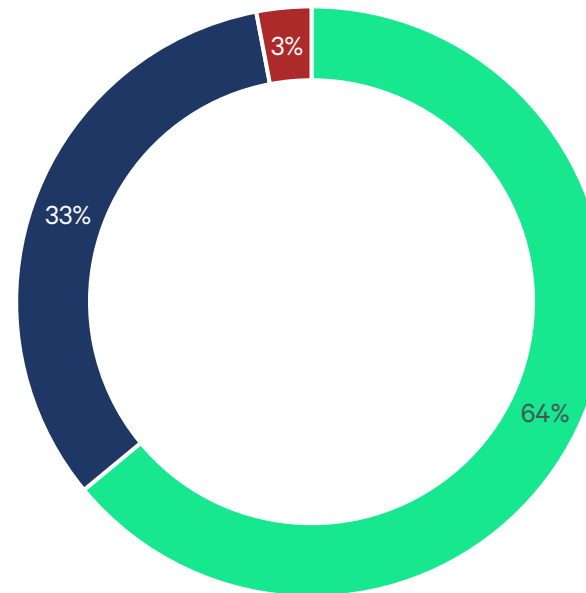


Figure 7: Enjoying participating in events created by the building where the office is located for its tenants

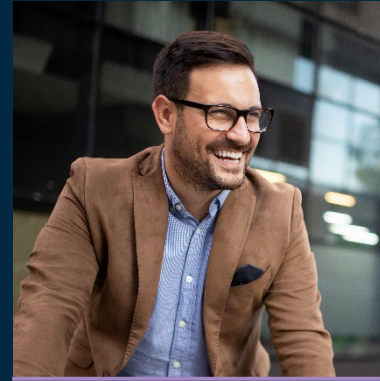
- Yes
- Only if I'm at the office
- No

Source: CBRE Research



Generation Z Post Millennials

- “ A small forest with benches.
- “ Boxing hall.
- “ The house I live in.
- “ A food truck station that rotates so I can try new dishes every week.
- “ A place to sell bagels.
- “ A grocery store with fresh fruit and vegetables from local growers.



Generation Y Millennials

- “ Puppy and a cat. Or a puppy yoga – a puppy yoga room.
- “ A bar up on the terrace open after 6pm.
- “ A boutique with exclusive discounts.
- “ A theatre nearby, as well as the Gaming Area.
- “ Prayer/meditation room. Spa or hammam.
- “ I'd bring the 23-tram line right past the office to save the 15-minute walk.
- “ A mountain.



Generation X Pre-Millennials

- “ Heliport.
- “ A lake.
- “ Recreation space.
- “ General store.
- “ Wine bar.
- “ A pub with access to books to read.
- “ An open-air cinema.
- “ Nap room.
- “ Swedish buffet.



Generation Baby Boomers

- “ Tonomat with music.
- “ A pet hotel and a special kindergarten for dogs.
- “ An amusement park.
- “ An entire shopping mall.
- “ A concert hall, or a theatre. A tennis court. An STB station.
- “ My house.
- “ A relaxation room and a nutritionist.

Behind the scenes, out of the box answers generations had

“when asked what they would fetch near their office if they could pick anything“

03

Generation Z

Social and speed

Entrepreneurs

Digital Natives

Multi-taskers

Educated

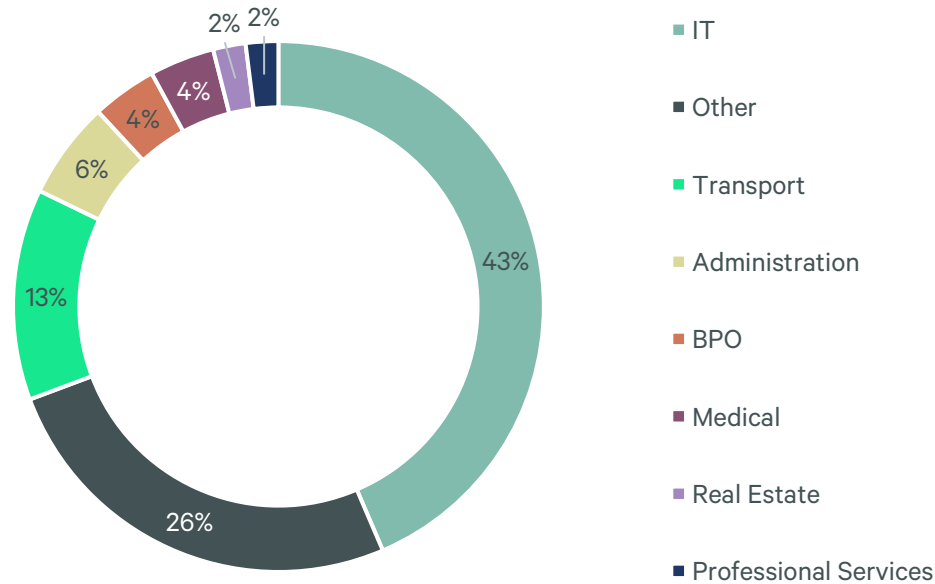
Less Focused

Generation Z (Post Millennials)

Generation Z representatives are the young adults born after the year 2000, that grew up with the social media having access from day one to all the new technology.

The generation's representatives that took our survey work in eight different industries, respectively: IT, Transport, Administration, BPO, Medical, Real estate, Professional Services and Other sectors.

Figure 8:
Where They
Work



Source: CBRE Research



Generation Z (Post Millennials)

Work from the **office**

Employees Working Habits and Desires



The Generation Z representatives

52% of the respondents are working from the office for **more than three days per week**

20% of them go to the office **at least one day per week**

Generation Z (Post Millennials)

Work from **home**

Employees Working Habits and Desires



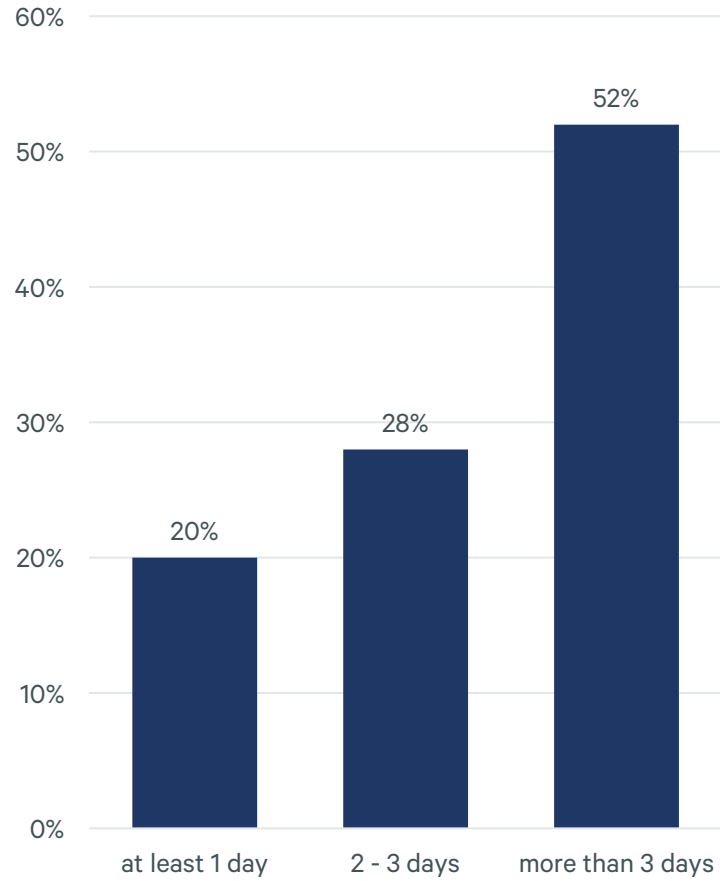
When asked what days they would rather work from home:

46%

marked **Friday as the least favourite day** to work from the office

Generation Z (Post Millennials)

Figure 9: Working Days from the Office



Source: CBRE Research

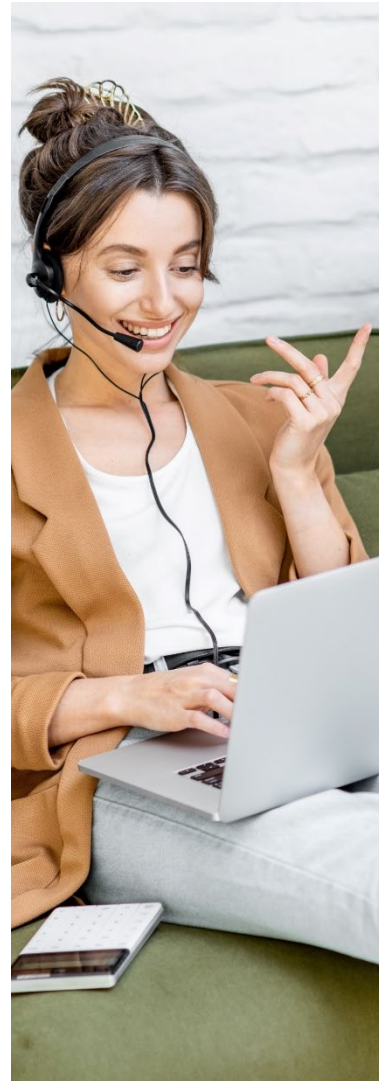
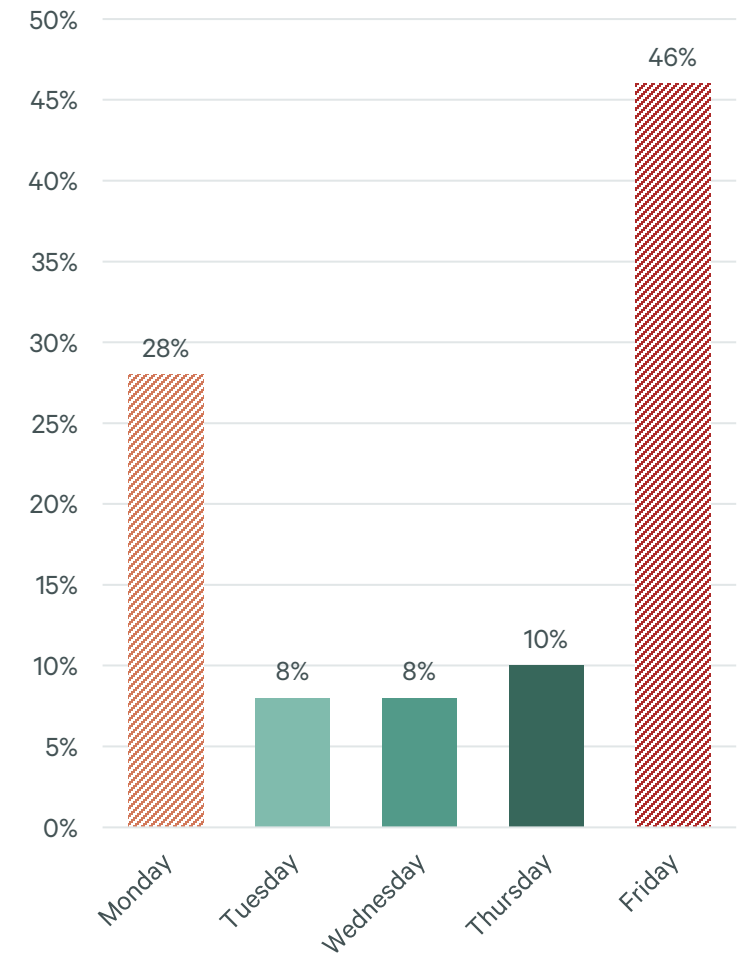


Figure 10: Preferred days NOT to be called to the office



Generation Z (Post Millennials)



Public Transportation

For the youngest of the generations, public transportation is a must!



83%

answers confirm that **public transportation in the proximity of the building office is more desirable** than having a shopping center nearby

17%

of respondents enjoy **a shopping spree near the workplace**

Generation Z (Post Millennials)

Spending Quality Time After Work

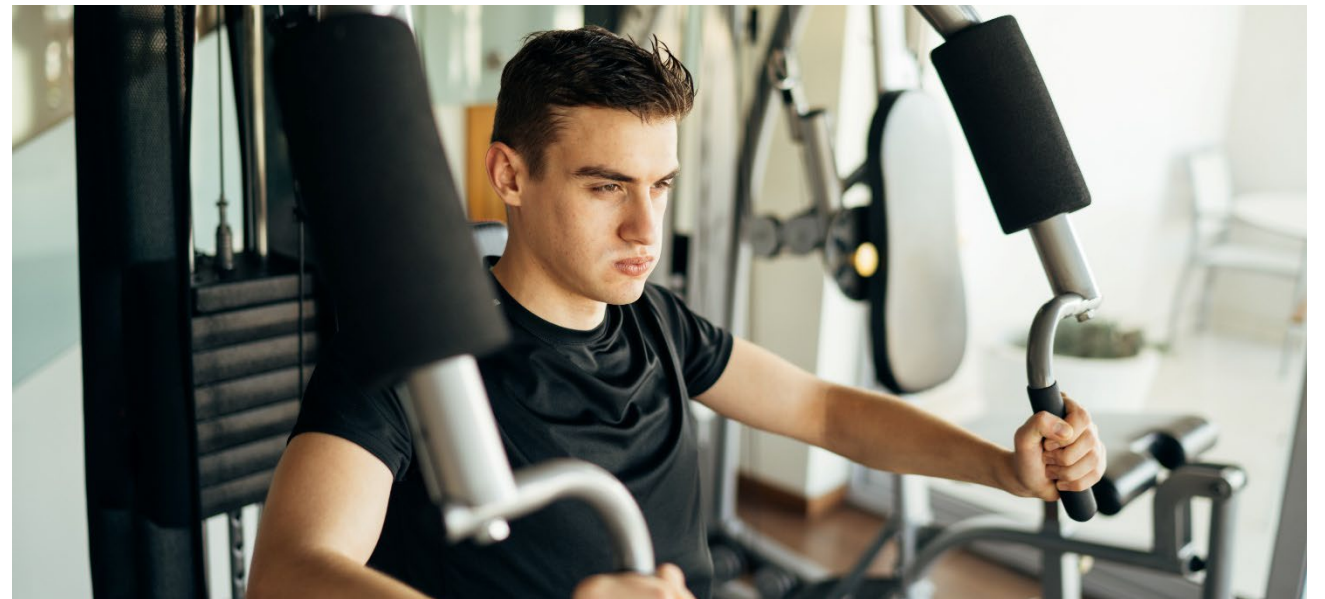
When leaving the office, fun with friends is more appealing:

65%

of the answers pointed **going out after work with friends** is what Generation Z would rather do

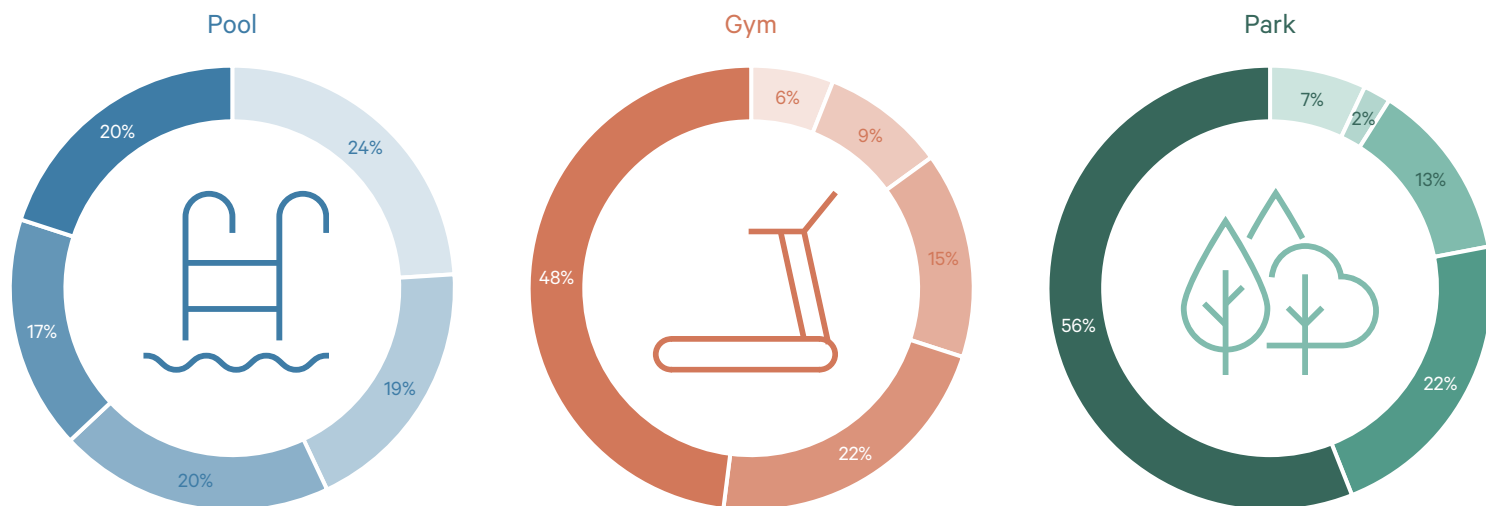
35%

of the respondents would **go to the gym** after hours



Generation Z (Post Millennials)

Location – the turning point in deciding what to do to relax after leaving the office.



Highly appreciated amenities:

a walk in the park

for their well-being, respondents of 18 – 25 years old, rated at maximum that **having a park near the office would be the largest benefit;**

going for a swim

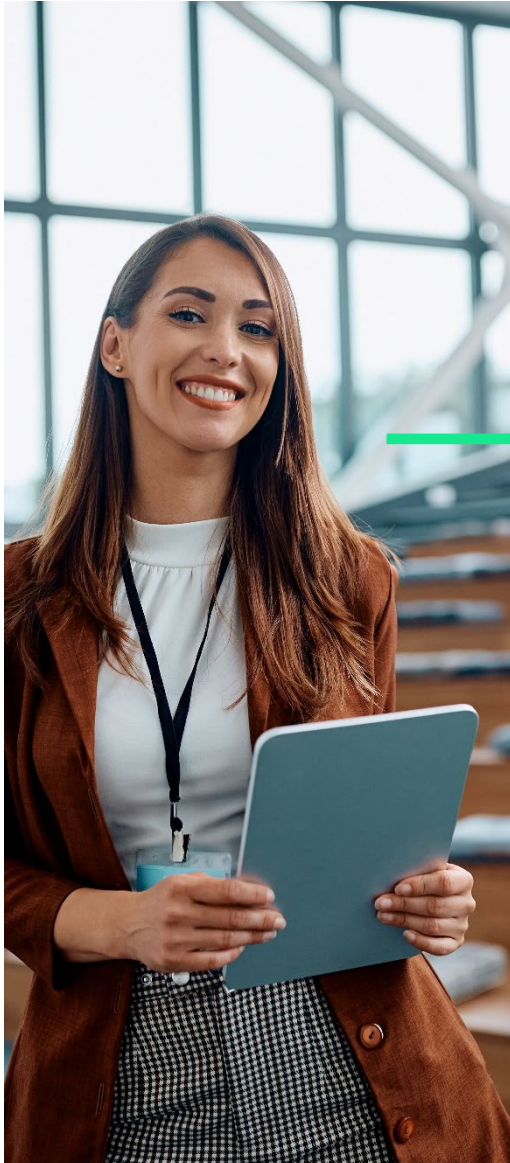
24% of the lowest grade, meaning **not considered a facility near the office,** was attributed to having a Pool in the proximity.

Figure 11: Important for the well-being to have facilities near the office



Source: CBRE Research

Generation Z (Post Millennials)



Socializing, networking or partying at events organized in their own office building?

76%

of respondents **would consider going** at events organised by the building in which they work;

24%

would accept the invitation only if it happens **they would be in the office.**

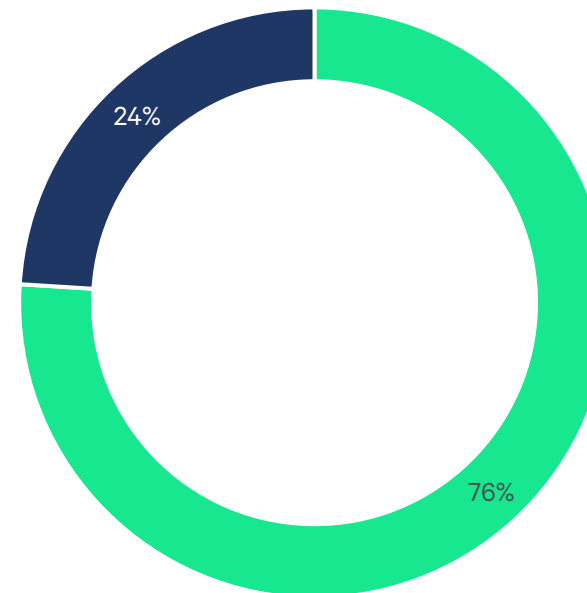


Figure 12: Enjoying participating in events created by the building where the office is located for its tenants

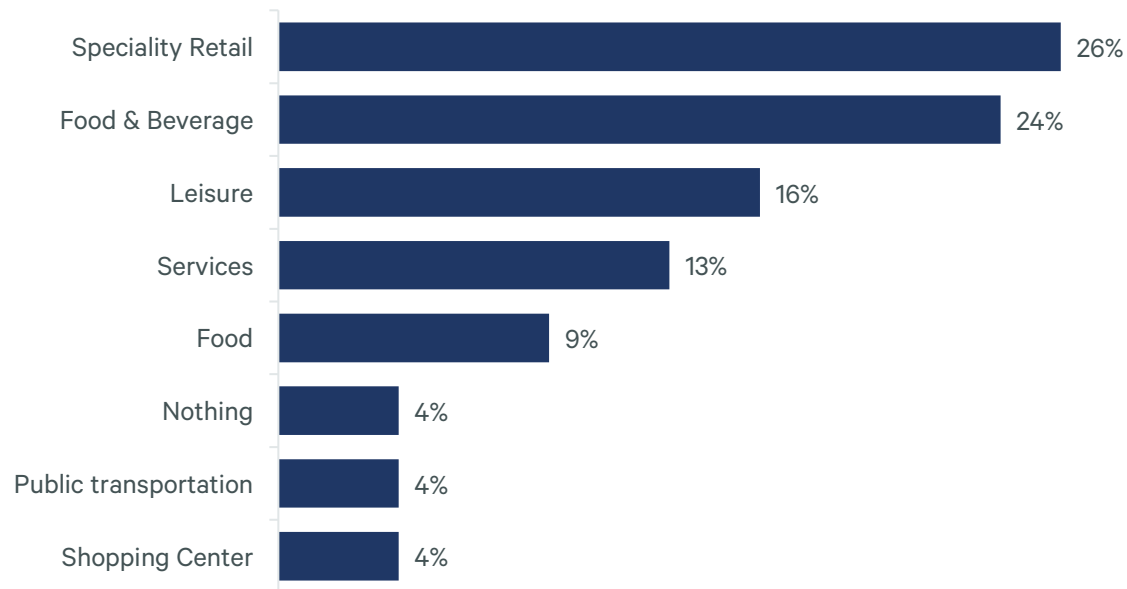
- Yes
- Only if I'm at the office

Source: CBRE Research

Generation Z (Post Millennials)

Next to your office?

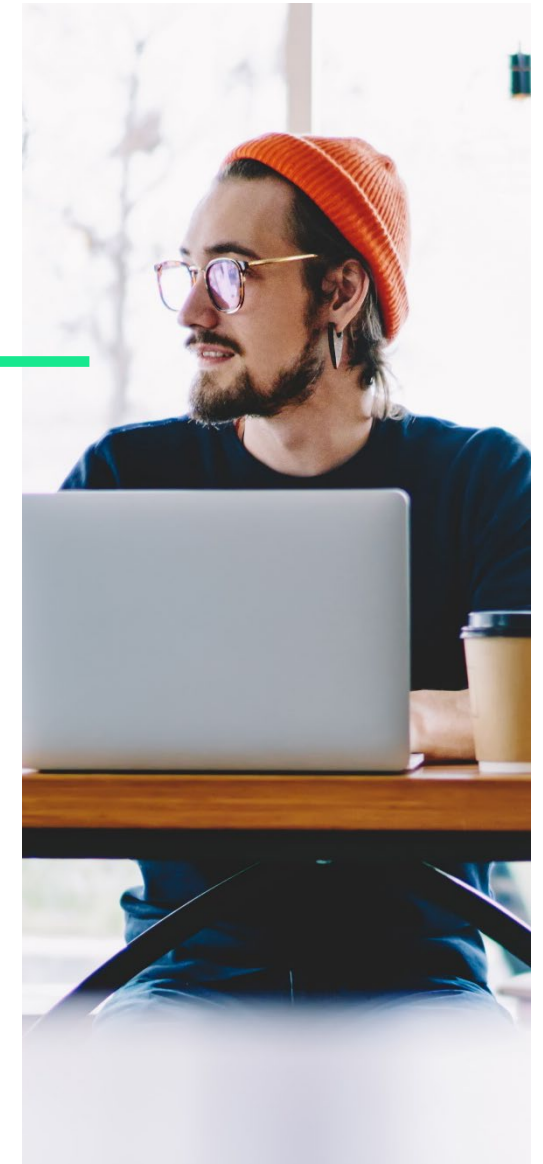
Figure 13: What would they bring to/near the office building they work to make life easier



Source: CBRE Research

More Speciality Retail and Food & Beverage operators are wanted by half of the Generation Z respondents in the or near the building they work:

- Pharmacies, coffee shops, restaurants and ice cream shops are the type of retailers considered to make life easier at the office;
- With shares of 4% each, proximity to public transportation, a shopping center or just nothing were the fewest listed preferences.



04

Generation Y

Tech-savvy

Independent

Service-oriented

Optimistic

Determined

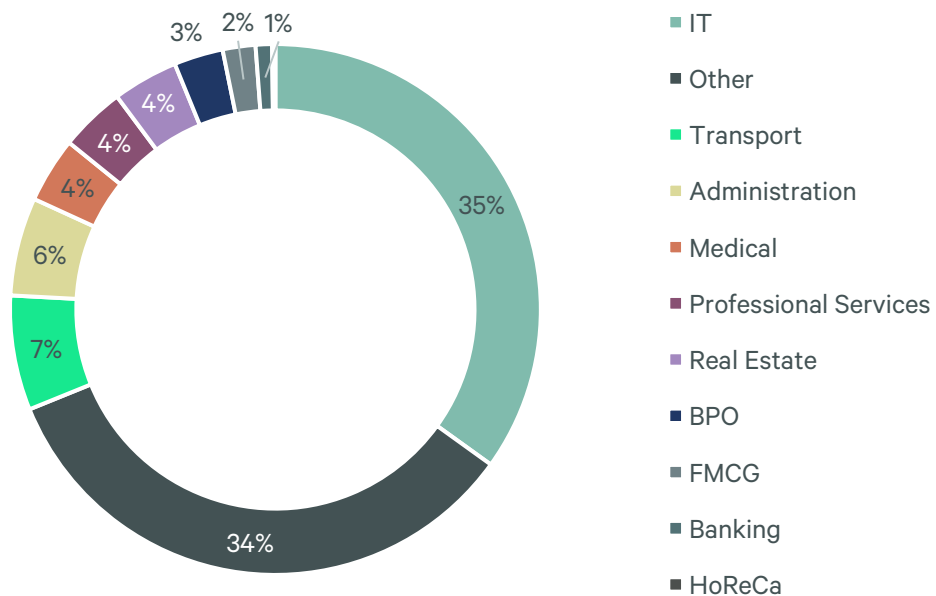
Innovative thinkers

Generation Y (Millennials)

Generation Y comprises the persons born between the years 1980 and 2000 and are also known as the Millennials. A tech-savvy generation, they witnessed as young adults the speedy development of computers and internet.

Survey respondents come from ten fields of activity and others, but the great majority (35%) work in the IT sector.

Figure 14:
Where They
Work



Source: CBRE Research



Generation Y (Millennials)

Work from the **office**

Employees Working Habits and Desires



The Generation Y representatives

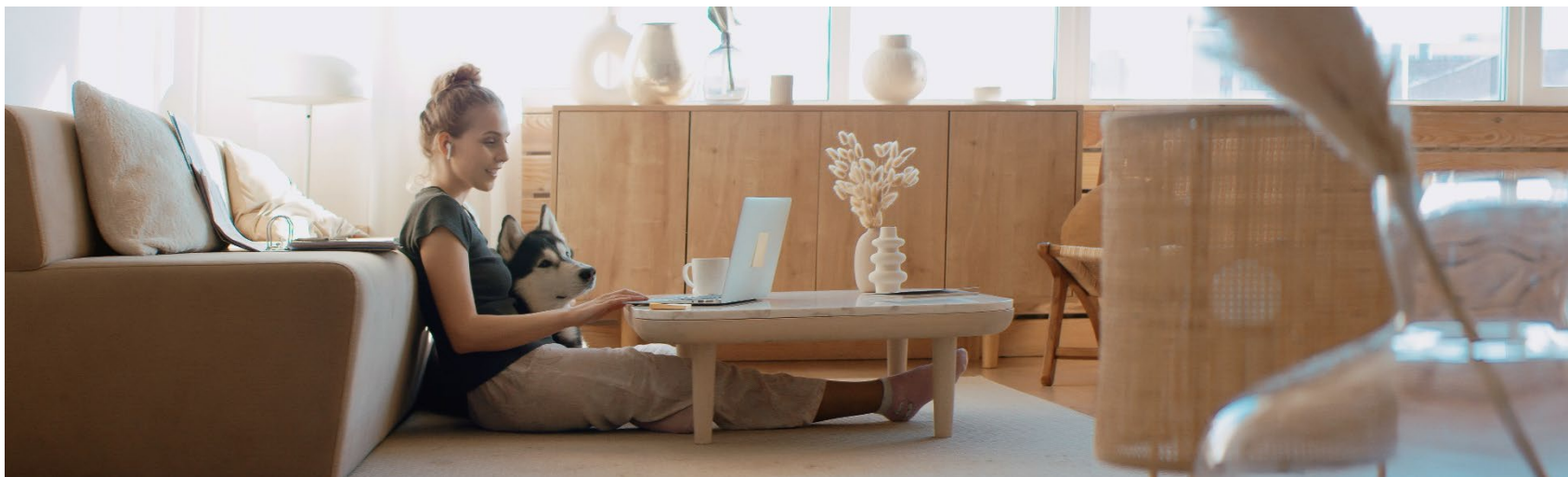
80% of the respondents work **at least 2 days / week from the office**

43% go to the office **more than 3 days in a week**

Generation Y (Millennials)

Work from **home**

Employees Working Habits and Desires



Millennials keep Fridays to work from home and second-best day for WFH is Monday.

41%

said **Friday is the least favourite day** to work from the office

Generation Y (Millennials)

Figure 15: Working Days from the Office

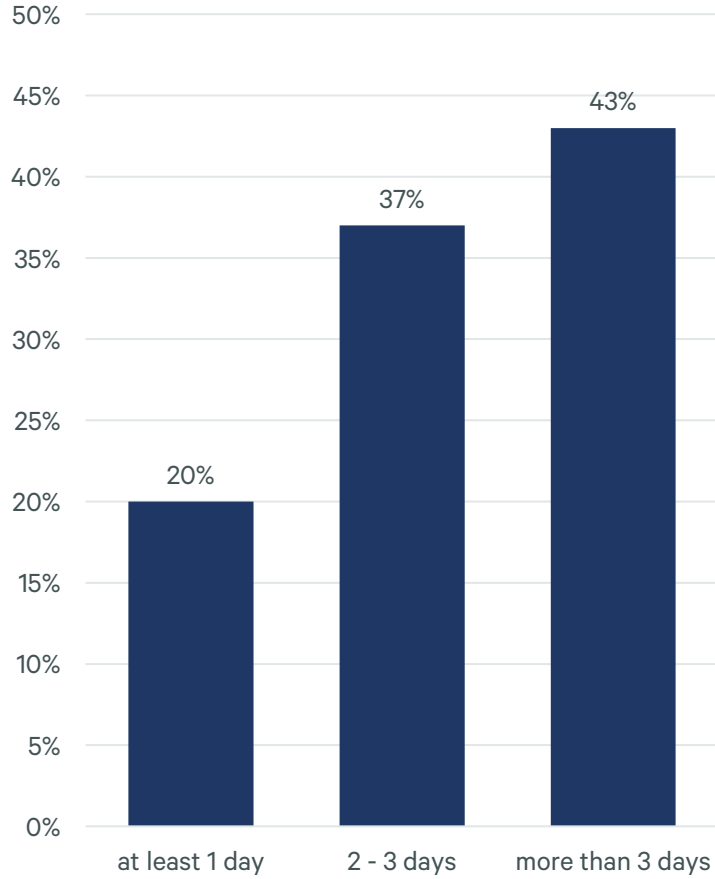
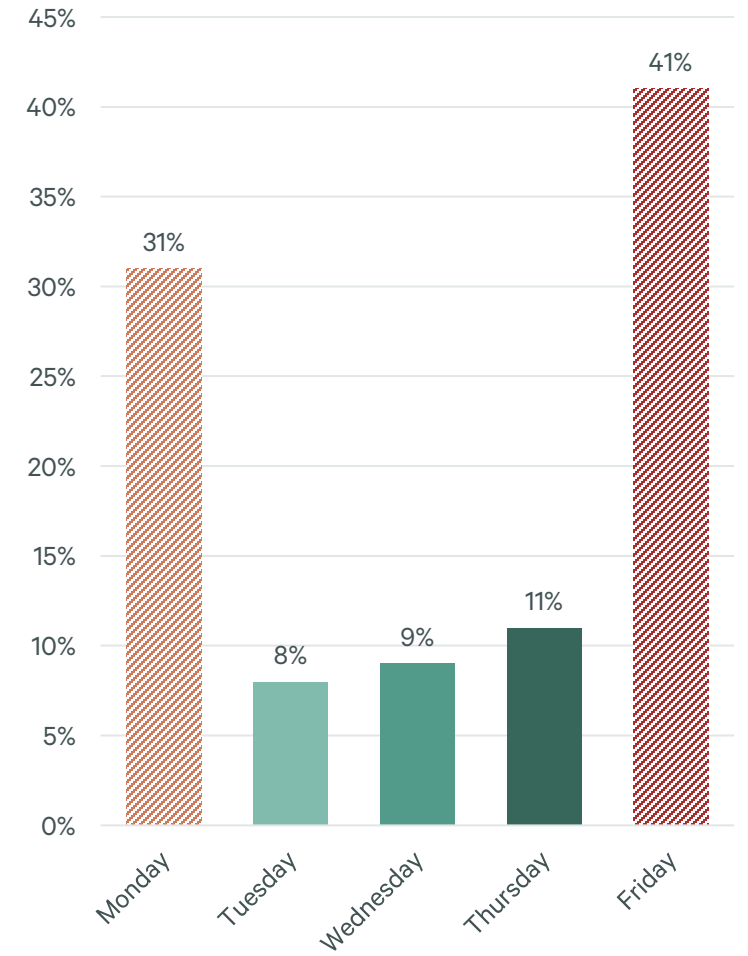
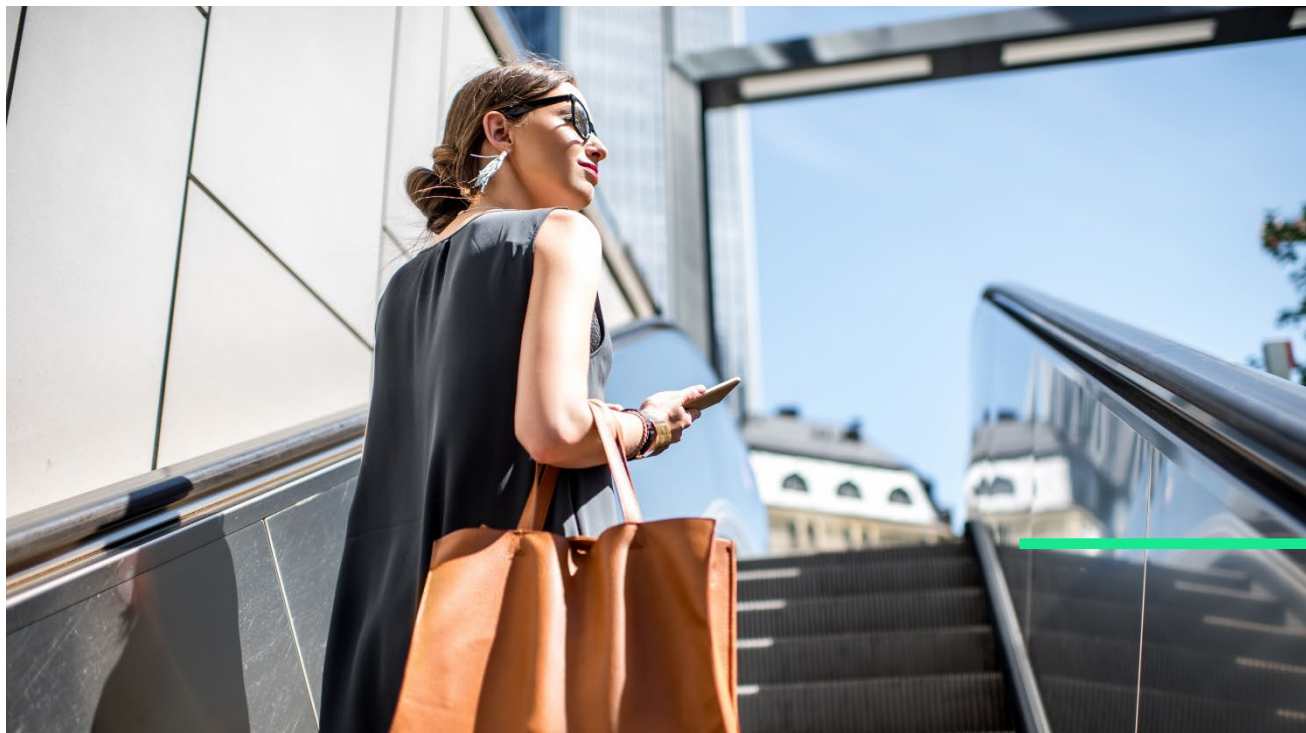


Figure 16: Preferred days NOT to be called to the office



Source: CBRE Research

Generation Y (Millennials)



Public Transportation

For all generations both commute mode and commute time remain the most important differentiator in terms of a building's attributes.



68% of generation Y respondents consider **public transportation a plus near the office**

32% more than a quarter, though, would **choose** to have **a mall in the vicinity** of their office space

Generation Y (Millennials)

Spending Quality Time After Work

Night out or workout?

61%

Going out is what 61% of the surveyed employees revealed they **would prefer after finishing work.**

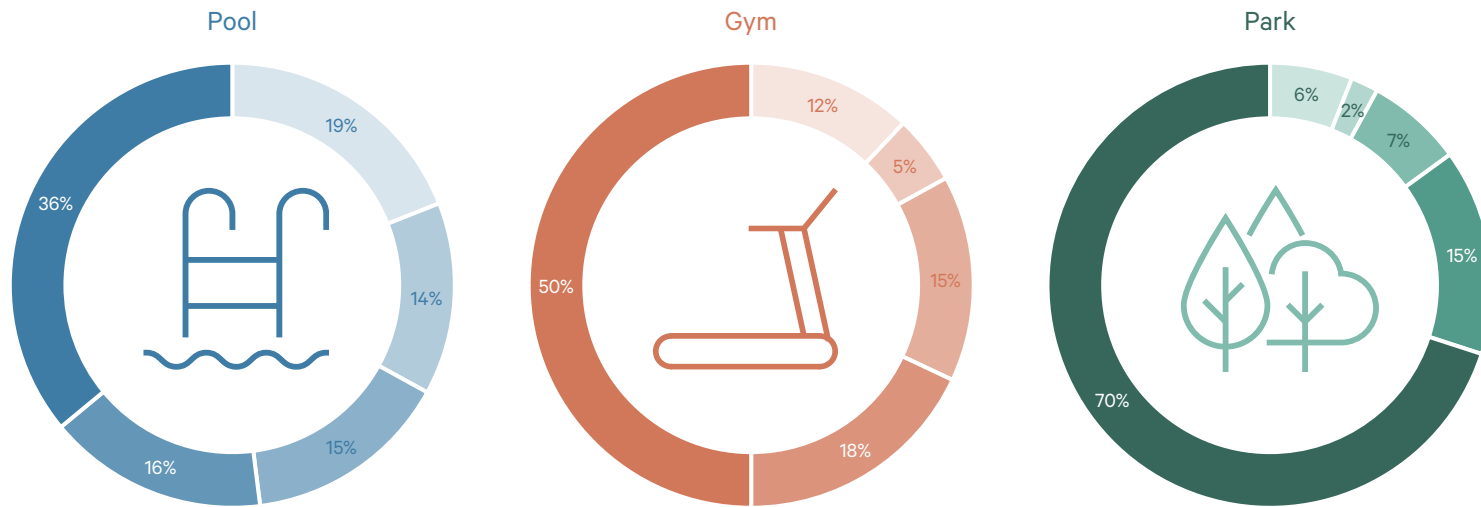
39%

of respondents considered **training at the gym** the better thing to do in once the working hours are over.



Generation Y (Millennials)

Location – the turning point in deciding what to do to relax after leaving the office.



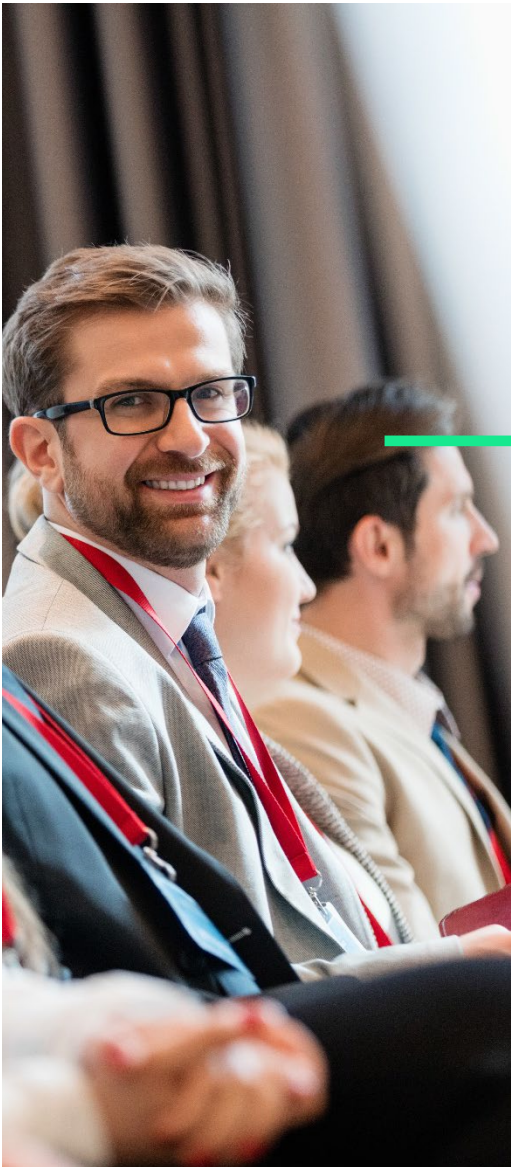
The value of green areas is reflected in the number of the highest grade attributed to **Parks** by answering employees when asked what is more **important for their well-being** to have near the office;

Pools are **not so highly appreciated**, receiving from the Millennials the largest number of the lowest grade.

Figure 17: Important for the well-being to have facilities near the office



Generation Y (Millennials)



Socializing, networking or partying at events organized in their own office building?

63%

of respondents **would positively respond** to attend events organised by the building in which they work;

3%

of the respondents **would not attend events** created by the office building where they work

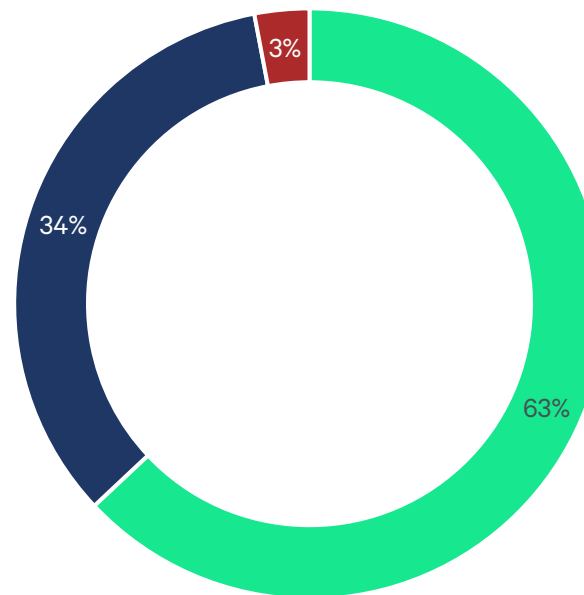


Figure 18: Enjoying participating in events created by the building where the office is located for its tenants

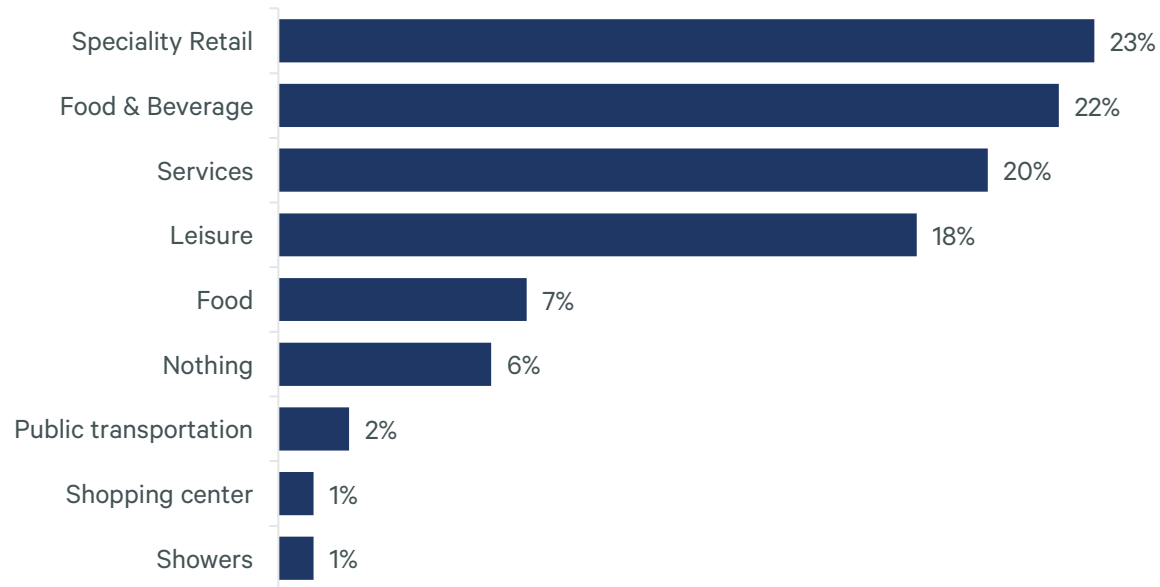
- Yes
- Only if I'm at the office
- No

Source: CBRE Research

Generation Y (Millennials)

Next to your office?

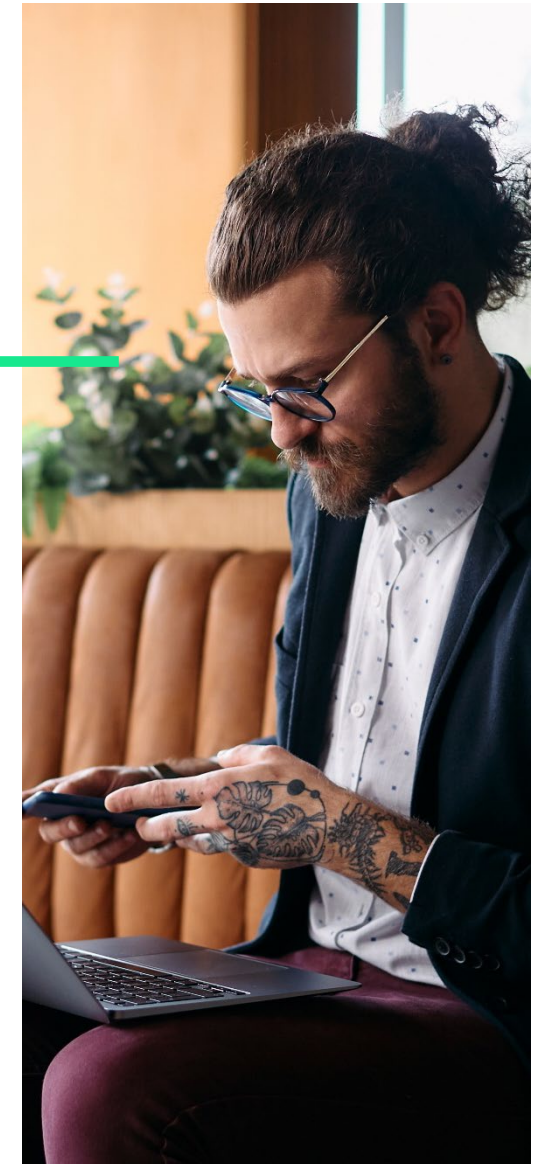
Figure 19: What would they bring to/near the office building they work to make life easier



Source: CBRE Research

Generation Y representative stated that life would be easier if they could bring close to their office premises Specialty Retail, Food & Beverage, Services or Leisure operators. Meaning that they would appreciate multiple options when it comes to:

- Restaurants
- Beauty clinics
- Pharmacies
- An after school
- Dry cleaning



05

Generation X

Skeptical

Tech savvy

Flexible

Globally concerned

Concerned about
safety & security

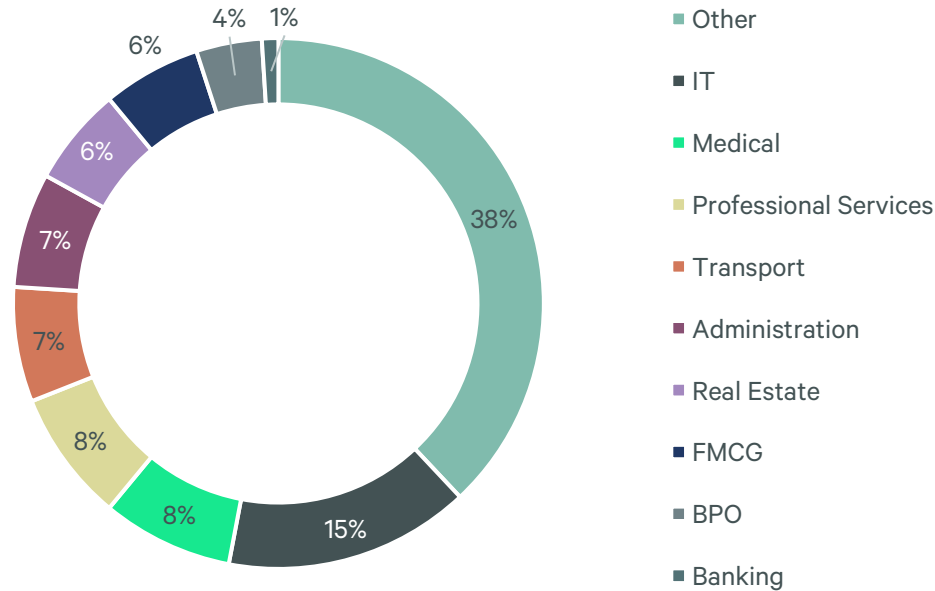
Individualistic

Generation X (Pre-Millennials)

Generation X or pre-millennials, are the people born between 1965 and 1980 that spent their childhood mostly outdoors. Educated tech savvy, individualistic but yet flexible in their work, pre-millennials employees show a greater concern for safety and security matters.

Respondents to survey that falls in this age category, activate in eight lines of businesses plus other activity fields. IT employees were the most numerous with a share of 15%, closely followed by Medical and Professional Services sectors – each claiming a share of 8%.

Figure 20:
Where They Work



Source: CBRE Research



Generation X (Pre-Millennials)

Work from the **office**

Employees Working Habits and Desires



The Generation X representatives

69% The great majority of them declared that they work from the office **more than three days a week**

3% stated that they work in the office **at least a single day** in a week

Generation X (Pre-Millennials)

Work from **home**

Employees Working Habits and Desires



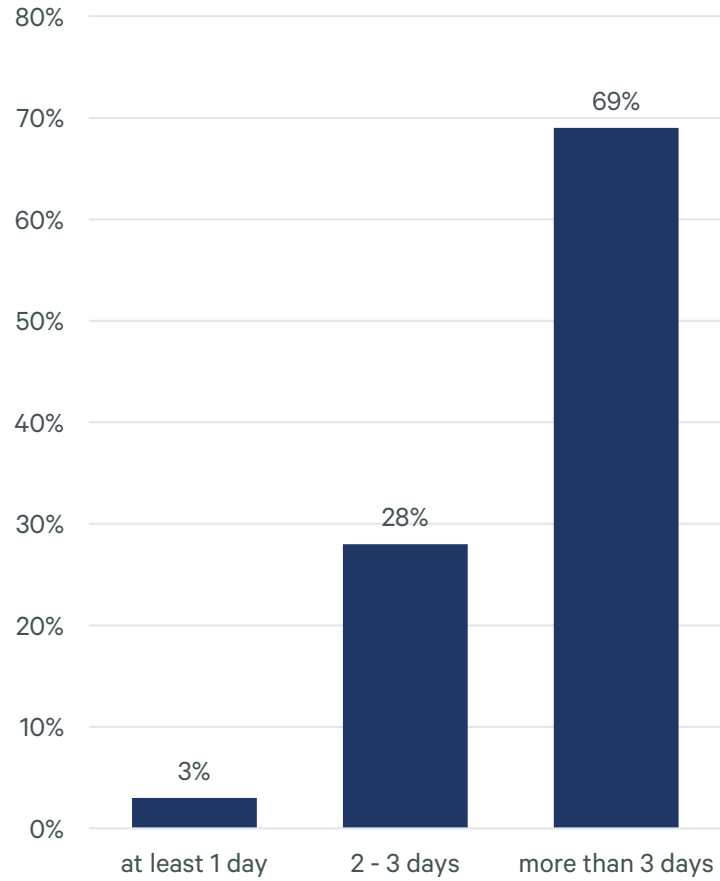
When asked what days they would rather work from home:

90%

The overwhelming majority of answers pointed towards **Friday and Monday as days the least desired** to work from the office

Generation X (Pre-Millennials)

Figure 21: Working Days from the Office



Source: CBRE Research

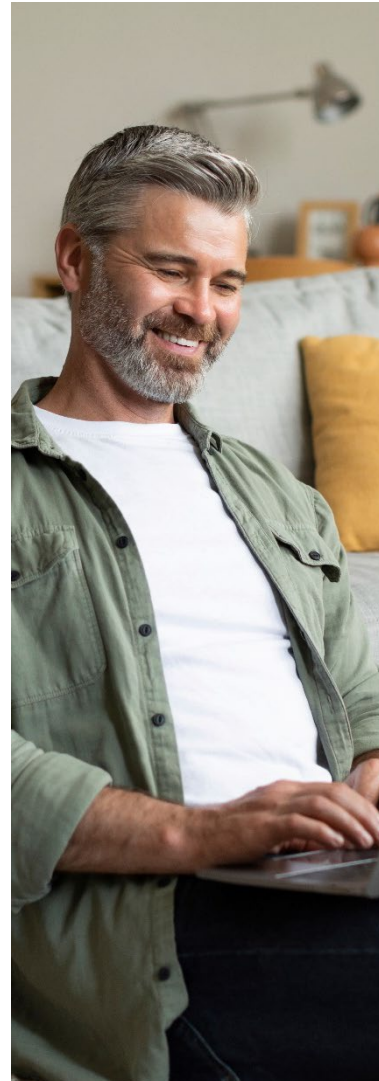
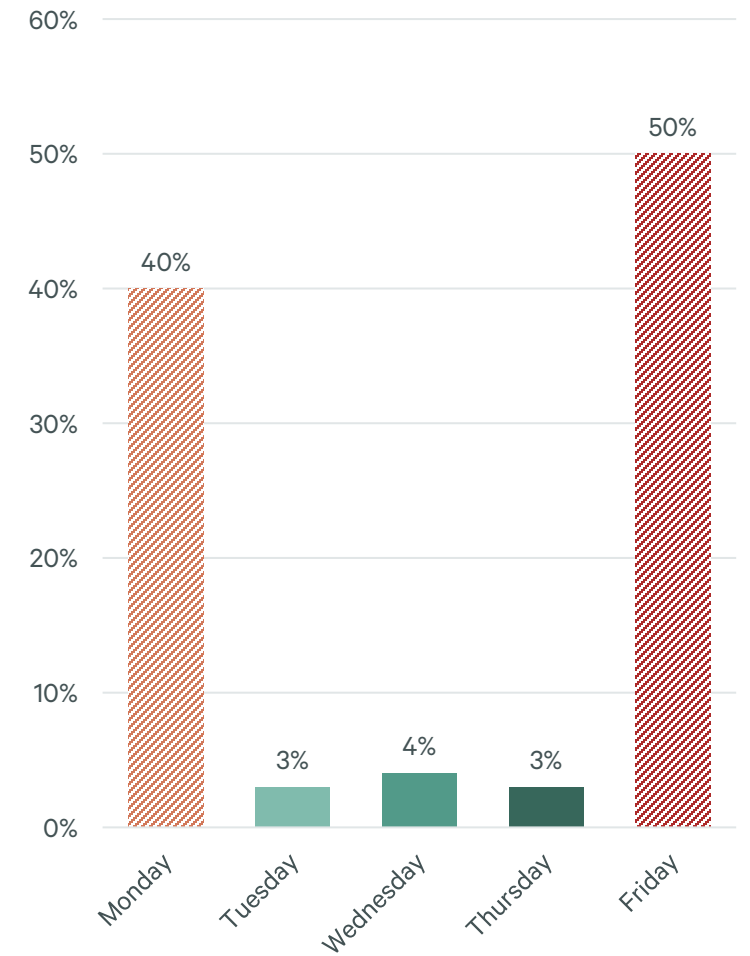


Figure 22: Preferred days NOT to be called to the office



Generation X (Pre-Millennials)



Public Transportation

Public transport is an important attribute of all generations, but Generation X scores lowest.



67% respondents would choose to have employers' **headquarters near a public transport station**

33% **shopping centers are important** for a third of survey participants

Generation X (Pre-Millennials)

Spending Quality Time After Work

Fun in the city maintained for this Generation as well as preferred after hours activity but the novelty is that sport time share increased amongst respondents.

57%

of the answers pointed **going out after work with friends** is what they would rather do

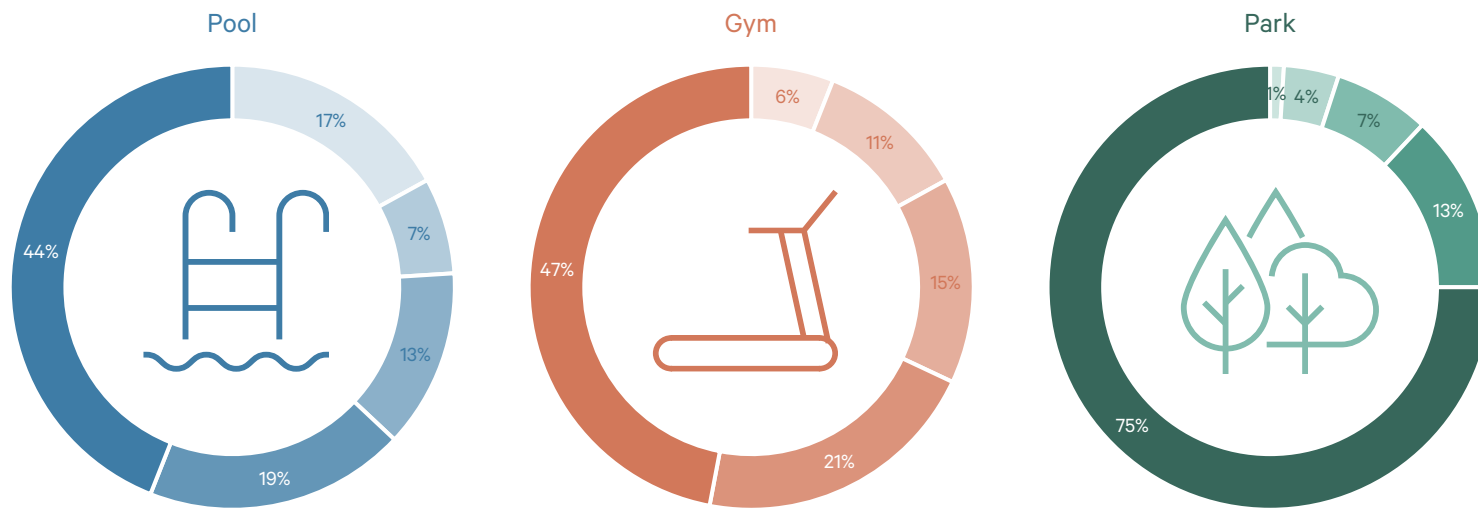
43%

answered that **training at the gym weighs more** during week time than hanging out with friends.



Generation X (Pre-Millennials)

Location – the turning point in deciding what to do to relax after leaving the office.



Parks received the most numerous high rates as **essential point of interest** in proximity of the office, as opposed to **Pools** which seems to rank **the least wanted** feature near the workplace.

Figure 23: Important for the well-being to have facilities near the office



Generation X (Pre-Millennials)

Socializing, networking or partying at events organized in their own office building?

- An event organised by their HQs office building would be attended by 58% of Generation X respondents;
- An increased share in total answers when compared with the other three analysed generations is the attendance correlated with the presence at the office; So, such invitation would be accepted only if the event is organised during the days when they are in the office;
- 6% respondents proved to be reluctant to such type of events, and wouldn't participate no matter the day.

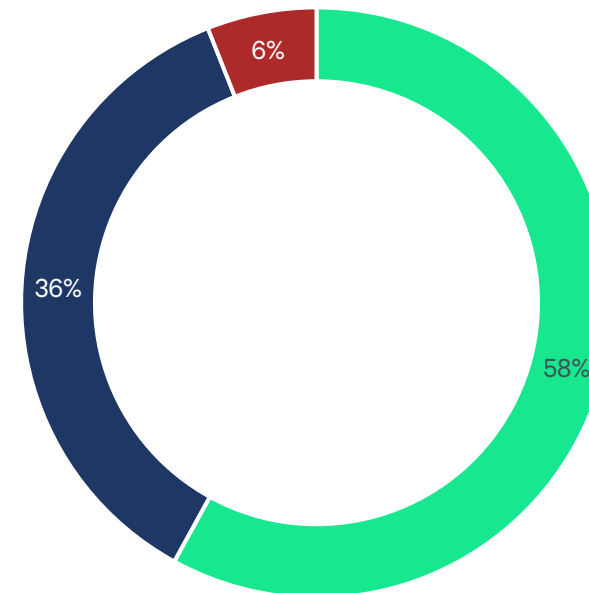


Figure 24: Enjoying participating in events created by the building where the office is located for its tenants

- Yes
- Only if I'm at the office
- No

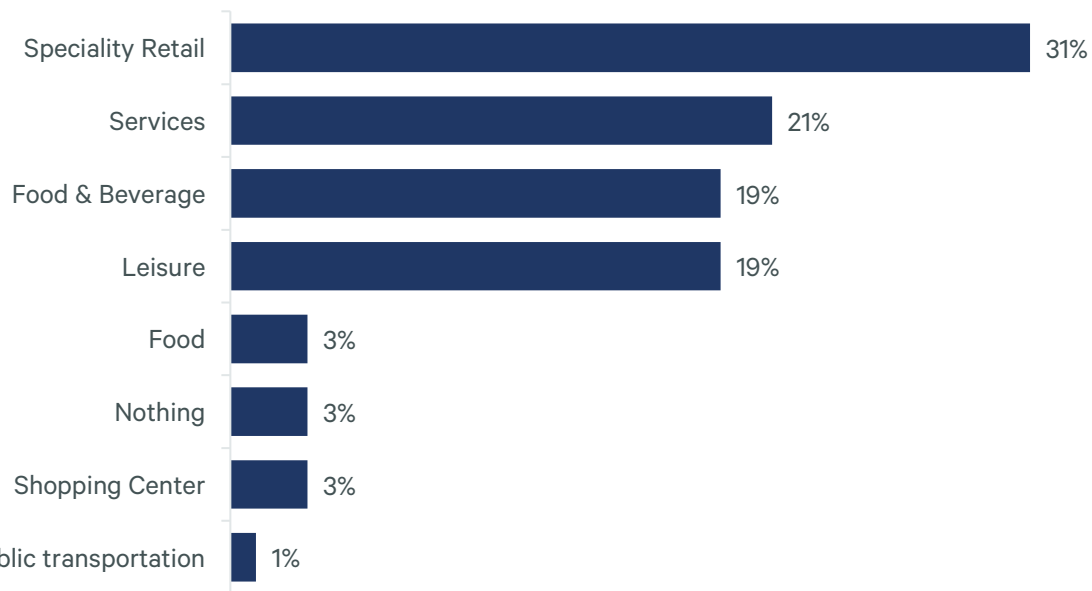
Source: CBRE Research



Generation X (Pre-Millennials)

Next to your office?

Figure 25: What would they bring to/near the office building they work to make life easier



Source: CBRE Research

Besides Speciality Retail and Food & Beverage shops, this age group would like to have near work more Services and Leisure retailers such as:

- Dry Cleanings
- Kindergarten
- Afterschool
- Pet Shops
- Leisure Activities
- Bike and Scooters stations



05

Generation Baby Boomers

Tolerant

Hardworking

Committed

Self-sufficient

Disciplined

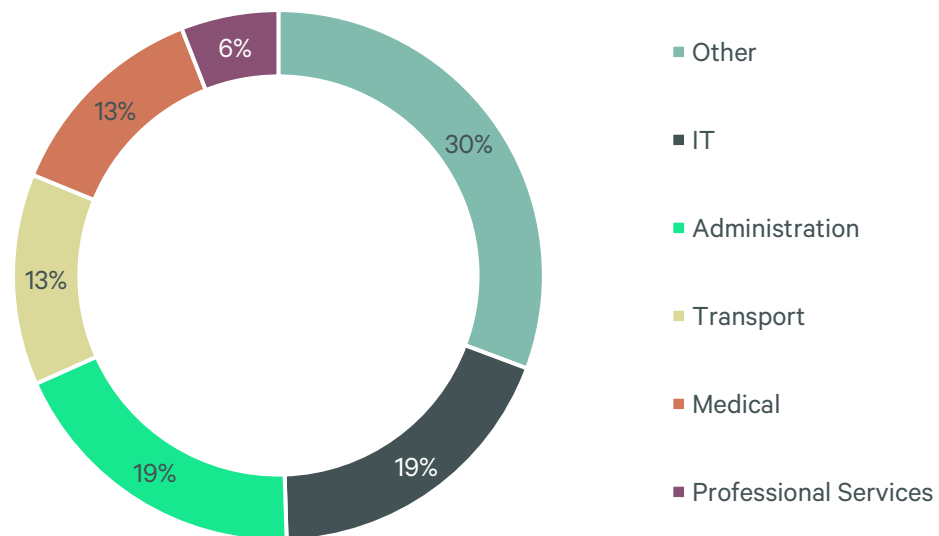
Team-player

Generation Baby Boomers

Baby Boomers is the generation born between 1946 and 1964 and the representatives of this generation are known to be disciplined and hardworking. Expecting for others to show the same respect and work ethics, the representatives of this generation often experience in their day-to-day life the generational gap.

Survey respondents work in IT, Administration, Transport, Medical, Professional Services and other areas, but the first two generated the largest shares of responses, meaning 19% each.

Figure 26:
Where They
Work



Source: CBRE Research



Generation Baby Boomers

Work from the **office**

Employees Working Habits and Desires



When compared with the other generations aggregated responses, this generation representatives have the highest share of persons that work from the office more than three days per week;

75% of the respondents are working from the office for **more than three days per week**

0% no answers were registered **for at least one day per week** for office attendance.

Generation Baby Boomers

Work from **home**

Employees Working Habits and Desires



The most suitable day for them to work from home is Monday, followed by Friday.

42%

responded **Monday as the least favourite day** to work from the office

Generation Baby Boomers

Figure 27: Working Days from the Office

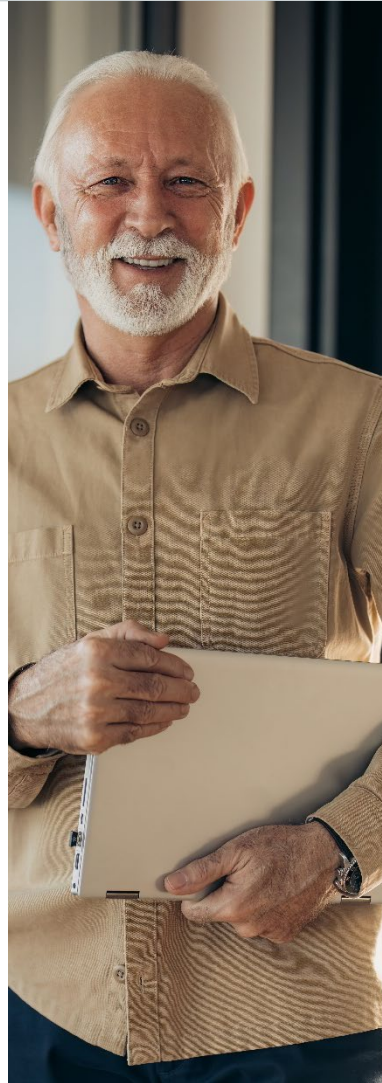
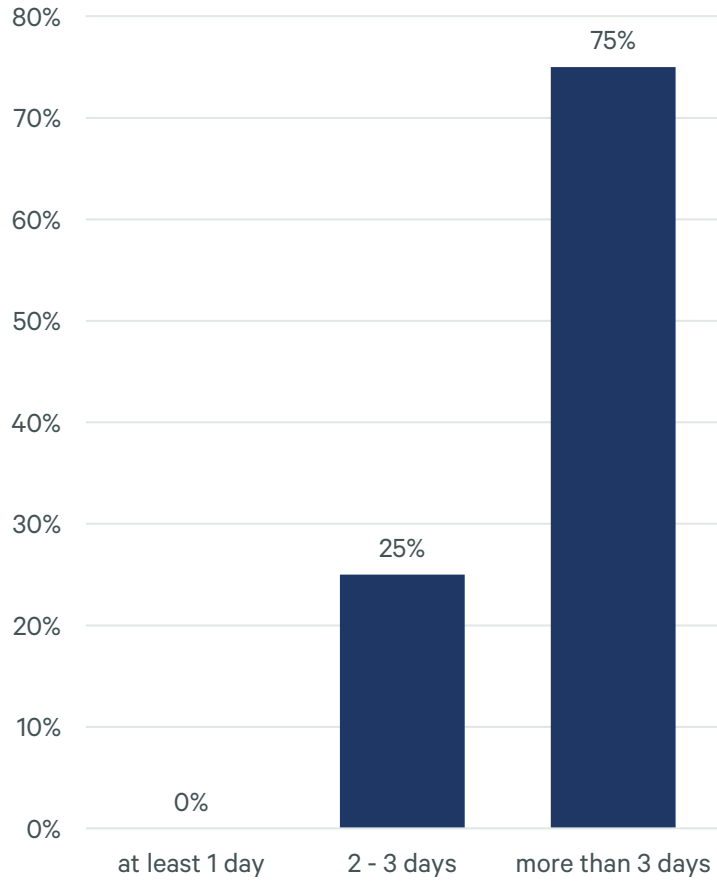
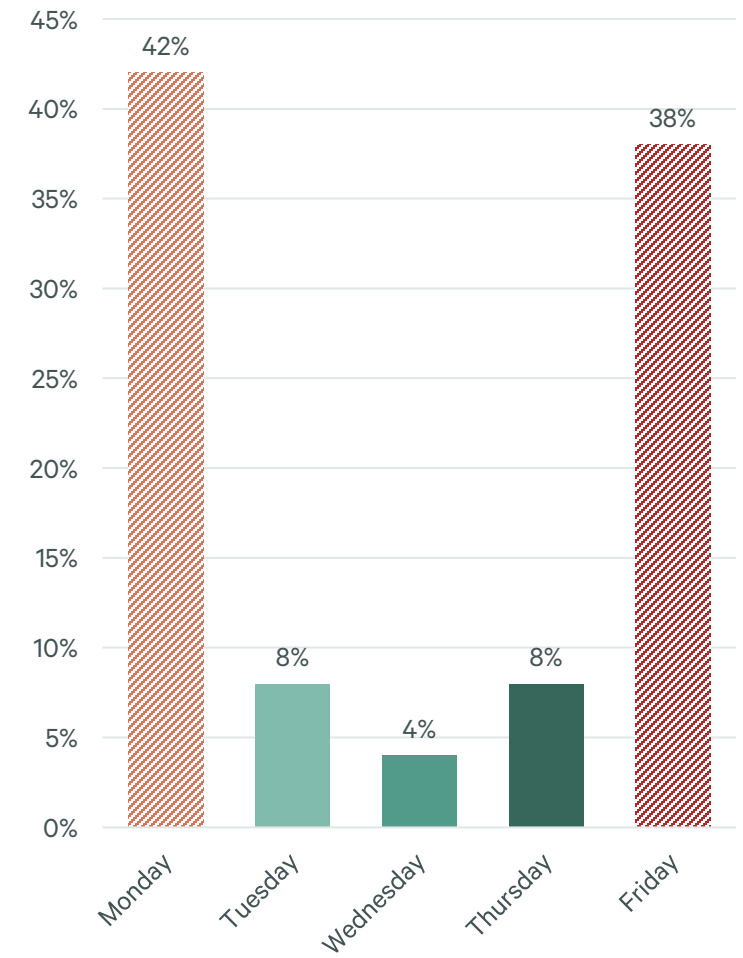


Figure 28: Preferred days NOT to be called to the office



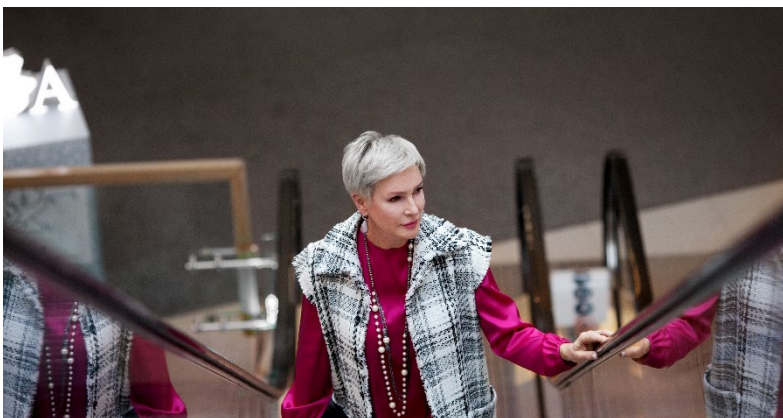
Source: CBRE Research

Generation Baby Boomers



Public Transportation

Public transportation gains larger shares in employees first choice if they were asked about main criteria of selecting an office premises;



88%

answers confirm that **public transportation in the proximity of the building office is a plus**

12%

consider **necessary to have a shopping center** close to the office

Generation Baby Boomers

Spending Quality Time After Work

Sport or out and about? The two options are just as important, each having equal shares amongst favourite ways to spend the time after work.

50%

of the respondents would **go out with friends** after hours

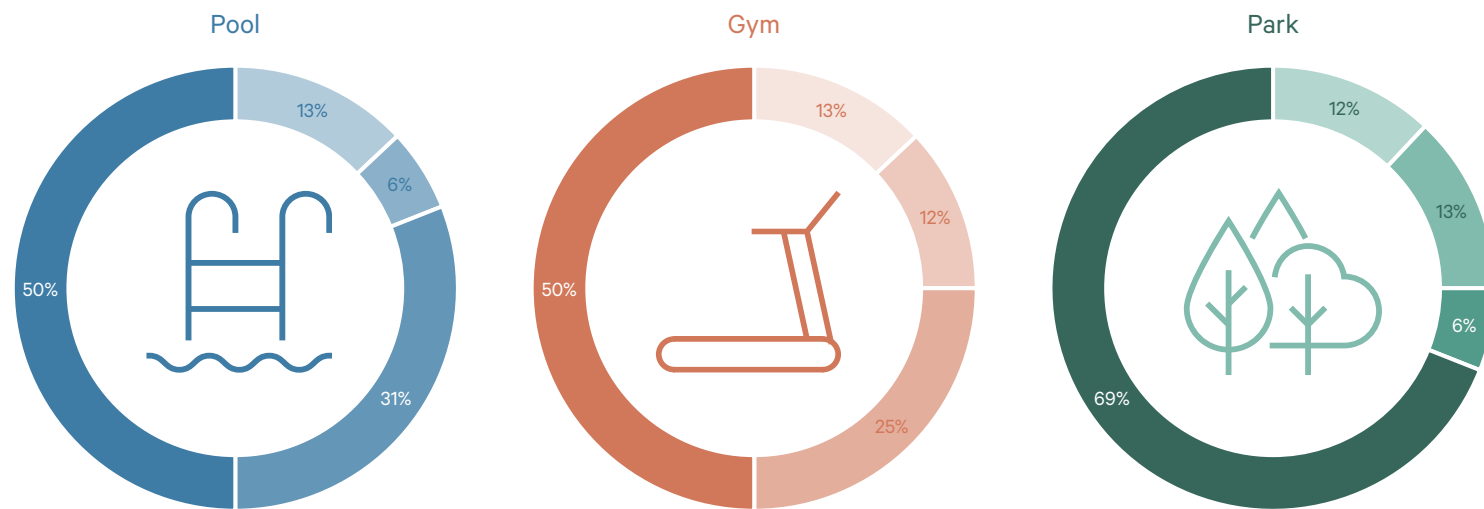
50%

of the respondents would **go to the gym** after work



Generation Baby Boomers

Location – the turning point in deciding what to do to relax after leaving the office.



As per proximity to the office, **Parks would generate a sense of well-being** for most of the persons that answered the survey.

Gym right next to the office is **not as much as a game changer** for Baby Boomers representatives, attributing the largest number of small grades to this facility.

Figure 29: Important for the well-being to have facilities near the office



Generation Baby Boomers



Socializing, networking or partying at events organized in their own office building?

69%

of respondents **would say Yes** to an event created by their office building representatives.

25%

A quarter would attend this type of business events **if it happens to be in the office** during the event day.

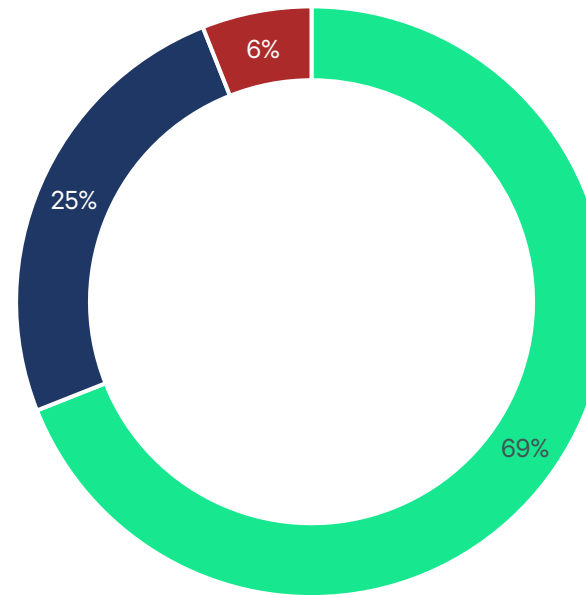


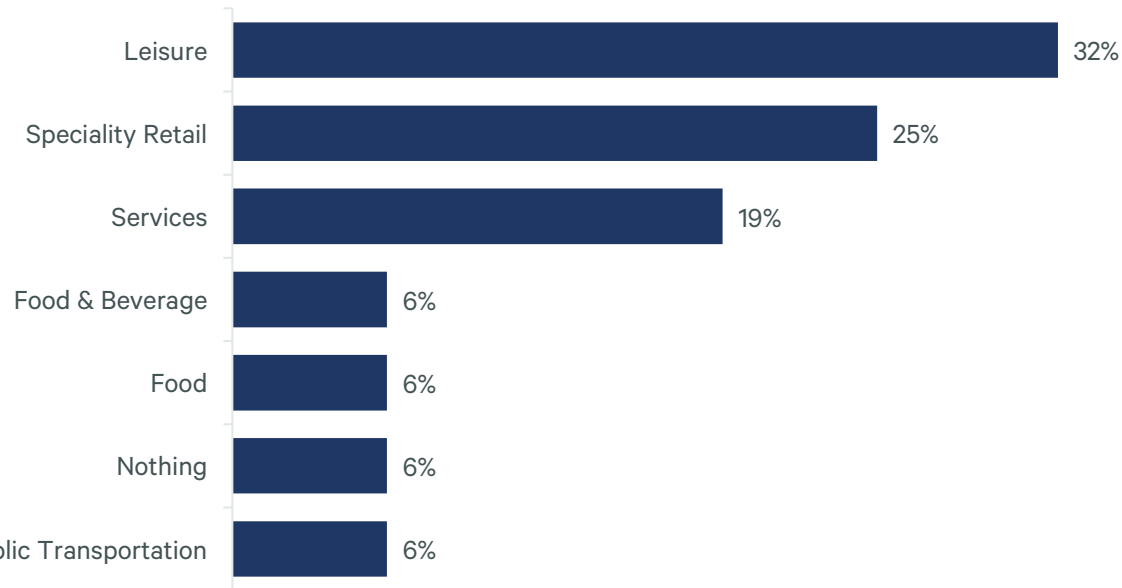
Figure 30: Enjoying participating in events created by the building where the office is located for its tenants

- Yes
- Only if I'm at the office
- No

Source: CBRE Research

Next to your office?

Figure 31: What would they bring to/near the office building they work to make life easier

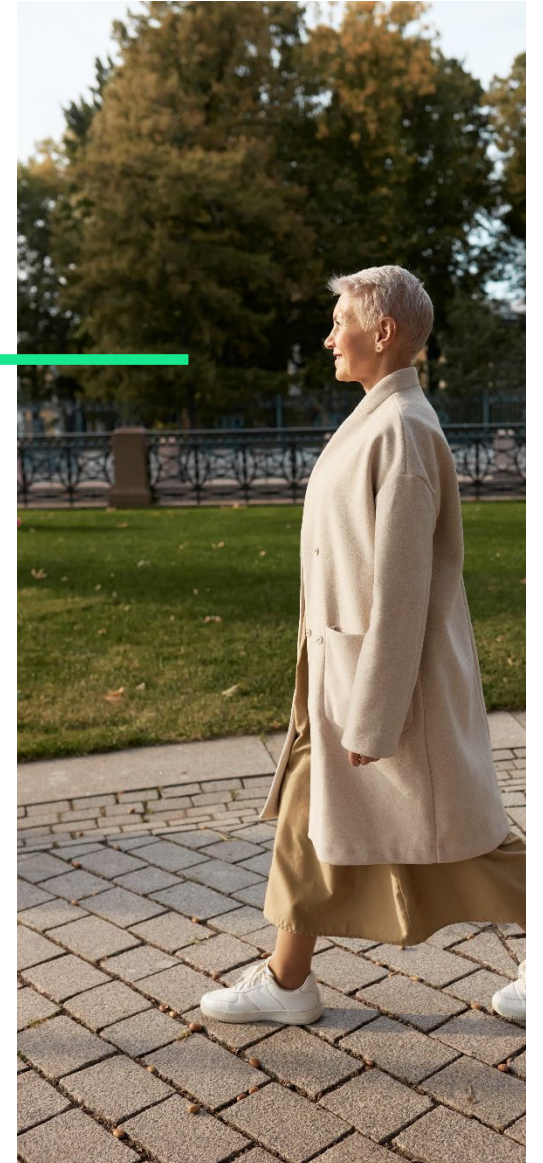


Source: CBRE Research

When asked what would impact their lifestyle on a positive way if it was nearer to the office, most of answers indicated Leisure options such as:

- Cinemas
- Theatres
- Green areas

More food or public transportation options are not overlooked by Baby Boomers responders, being mentioned as well in the list of nice to have.



06

Key Findings

5 takeaway ideas after
the generations talking



01

Three years after we were abruptly forced to rethink the way of working, hybrid work is still an active component for most companies work style. Half of the surveyed employees, no matter the generational category, still combine working from home with going to the office at least three days per week;



02

If they could choose the days to work from home, Mondays and Fridays are the ones best suitable, while Tuesday – Thursday period is favoured for office time;



03

Public transportation in the proximity is a must for 70% of survey answerers. No matter the age category, public transportation is preferred by employees when going to work when compared to a nearby shopping center;



04

Parks and green areas significantly contribute to employees' wellbeing and are considered amenities they would enjoy when going to their offices;



05

What would employees bring next to their office? More Specialty Retail, Food & Beverage and Services options just to make it easier throughout the day. Life – work balance is still a struggle for most of employees and proximity to what they need or enjoy is of high importance and considerably weigh on deciding on office premises attendance.

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