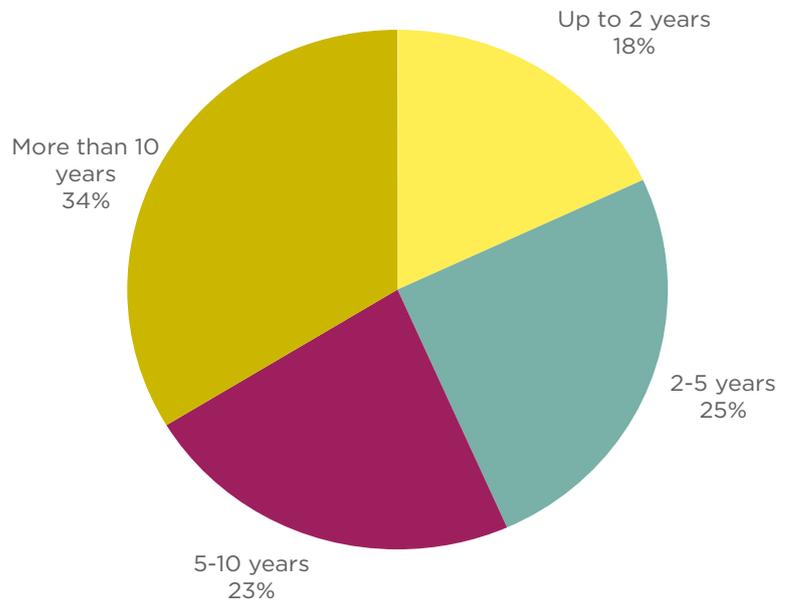


What European Legal Workers Want



“ Retaining talent is becoming increasingly difficult for global law firms, as 43% of surveyed legal workers expect to leave their job within the next five years. ”

Chart 1: How long do you expect to stay with your current employer?



Legal talent retention

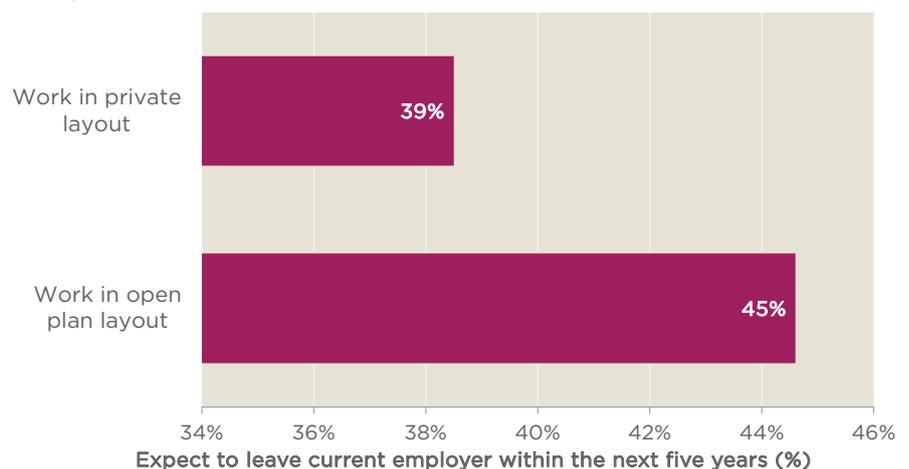
According to the British Council for Offices (BCO), 55% of business costs are employee salaries, and only 15% of total costs are property costs. Specifically for the legal sector, salaries account for a significantly higher proportion, which makes listening to employees' demands from the workspace even more important in order to maximise productivity and retain workplace talent. Asking and listening to staff

is key. However, our survey results show that 59% of legal workers have not been asked about their views of the office environment by their employer, higher than any other sector.

Retaining talent is becoming increasingly difficult, as 43% of surveyed legal workers expect to leave their job within the next five years (Chart 1). This suggests that of the legal trainees who stay on and become newly qualified in the

first two years, a quarter will leave in the following three years. Given the initial upfront costs of guiding legal trainees through training contracts, this is a huge drag on business growth and profitability for the sector.

Chart 2: Proportion of legal workers who expect to leave their job in the next five years.



What Legal Workers Want- Executive Summary

Savills What Workers Want survey investigates the wants and needs from the workplace of over 11,000 European office workers, a representative sample of which from the legal sector, covering 11 of Savills European office markets- France, Germany, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Spain, Sweden and the UK. The survey investigates what workers consider important, what they are dissatisfied with, and thus, what landlords and tenants need to improve, in order to attract and retain talent in the workplace.

We have broadened our analysis in our latest edition, covering how long workers expect to stay with their current employer, how technology can be used to draw employees to the workplace, how the workplace impacts workers' productivity levels and the impact that the workplace has on workers' mental and physical health.

Law firms are most concerned with attracting and retaining talent within the workplace, and ensuring the workforce is at its most productive. The key findings from our survey show that the most important factors for a worker are length and cost of commute, having the ability to work in a variety of workspace and provision of quality IT infrastructure. As the war for talent and skills intensifies, businesses are increasingly using their real estate as a differentiator.

What needs to change?

What are the five most important factors for legal workers?

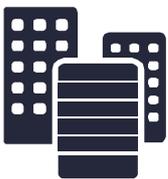
1) Length of commute to work 87%

2) Comfort of work area 86%

3) Cleanliness 86%

4) Noise level 86%

5) Lighting 86%



43% of workers most want to change the workplace design/layout.



27% of legal workers most want to change factors related to the location of their workplace.

Looking more closely at the numbers, legal workers reported that they are more likely to move jobs in the next five years if they work in an open plan office (45%) than those in a private office (39%) (Chart 2). Despite a general shift to open plan, collaborative working across Europe, legal heads of real estate should be aware that workers in open plan offices are less likely to remain with their employer, particularly given that the noise level was one of the most important factors for the ideal workplace. So what does legal talent want and what role can real estate in providing this?

43% of legal workers want to change their **workplace design/layout** (factors including internal design/fit-out (20%), personal workspace (18%) or external building design (5%)) more than any other factor (Chart 3). With a

shift to more flexible, open plan working, there is a concern that workers feel that they have less influence on their own personal workspace and are therefore more likely to leave.

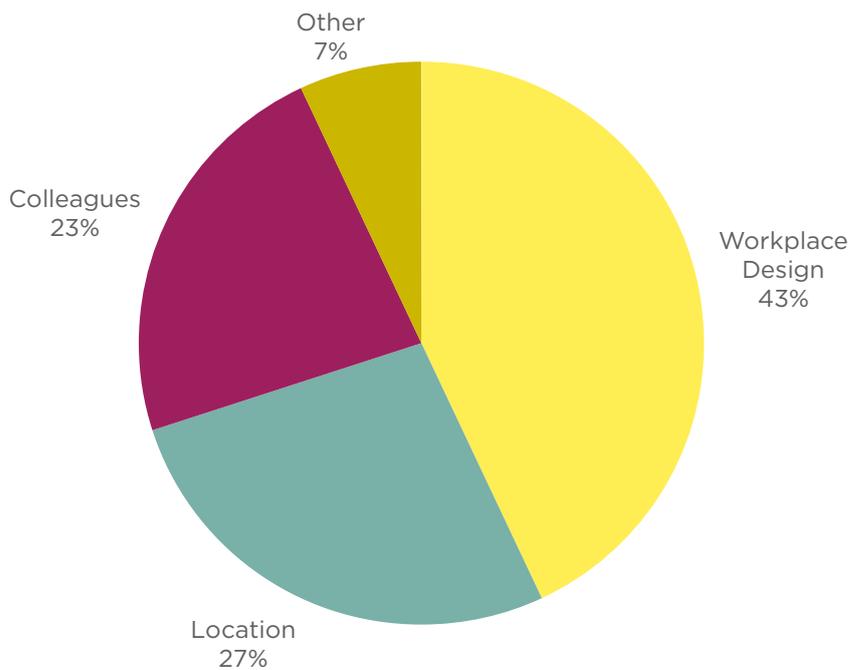
27% of legal workers want to change factors related to the **location of their workplace** more than any other factor, below the all sector average of 32%. Local amenities, public transport connections, business clusters and “buzz factor” are all drivers behind the preference for city centre working among legal workers. In fact, 75% of legal workers want their office to be located in a town/city centre, more than any other business sector.

Having the best real estate is essential in attracting the best talent in the initial recruitment phase. In fact, 23% of legal workers

most want to change either their **line manager or colleagues**, however, this is slightly below the all sector average of 25%. Indeed, those legal workers who reported that their workplace culture allows them to work flexibly were nearly 40% **less** likely to want to change their line manager or colleagues. Legal occupiers should encourage a more flexible working policy in order for employees to operate most effectively and want to remain at the firm.

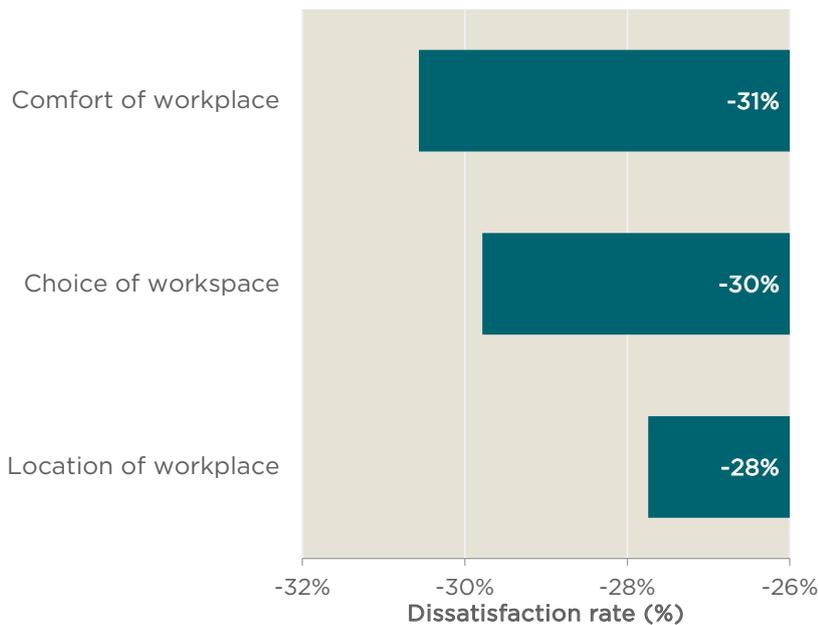
Legal workers who reported they were happy with their current workplace were also likely to remain at their current workplace for longer. 57% of happy legal workers would stay more than five years, against only 34% of workers who were not happy.

Chart 3: What would you most like to change about your current workplace?



What are legal workers dissatisfied with?

Chart 4: Legal workers: dissatisfaction rate (%)



Savills asked legal respondents what workplace factors they considered most important and what they were satisfied with, with the difference between the two creating a ‘dissatisfaction’ rate (Chart 4). Noise level, having a quiet space for focussed work and the internal design of the office are among the factors legal workers are most dissatisfied with, which indicates a need for legal occupiers to increase the **allocation of quiet working space** in their offices.

In terms of **workplace location**, it is the financial

cost, and length of commute to work which are the factors legal workers are most dissatisfied with. Indeed, 59% of respondents would not be willing to add any more than 15 minutes onto their commute each way in order to work at their ideal workplace, in line with the all sector average. Relocating more than 15 minutes away from the current workplace could risk losing some employees, but make other commutes easier, so heads of real estate and HR departments should liaise on where their staff commute from in order to reposition their real estate portfolios. Even moving

office locations further from transport nodes, or closer to stations operating at full capacity, will increase commute length.

Within the workplace, the temperature, air quality, comfort of working area and lighting are among the factors workers are most dissatisfied with. These “basic factors” should be prioritised as quick-fixes by occupiers, otherwise workers will increasingly look to work remotely, either from home or from flexible office space.

“59% of respondents would not be willing to add any more than 15 minutes onto their commute each way in order to work at their ideal workplace.”

Technology and legal worker demands

The office must continue to compete with alternative forms of workplace as workers demand more from their workplace and increasingly consider space as a service.

46% of legal workers reported that they would find a workplace smartphone app useful, although workers are often unaware of the benefits on offer through an app. Commonly, workplace smartphone apps provide workers with instant building access, landlord events, meeting room bookings, parcel deliveries, identifying vacant workspaces and even laundry services.

Interestingly, there was a significant disparity between respondents. 57% of legal partners considered smartphone apps to be useful, against only 34% of non-partners. If those in managerial roles are given consent to track employee **location** through a workplace smartphone app, could this increased transparency contribute positively to workplace output?

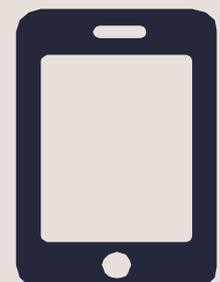
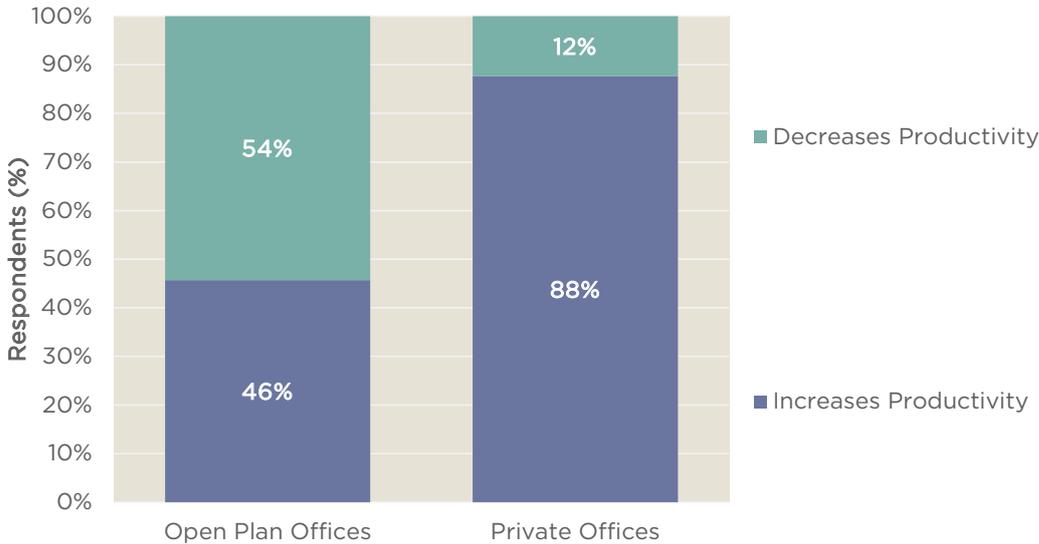


Chart 5: What impact do you feel your office layout has on your productivity?



88%

of legal workers in private offices feel that the layout has a positive impact on their productivity.



Maximising legal productivity through real estate

Having the right choice of real estate is essential for legal workers to be at their most productive and the majority of legal respondents reported their workplace has an impact on their productivity levels. Only 46% of those in open plan offices feel the office layout has a **positive** impact on their output levels, whilst this is the case for 88% of those who work in private offices (Chart 5).

Although this could point to a shift back to private office working, what's important is that there is no one-size-fits-all

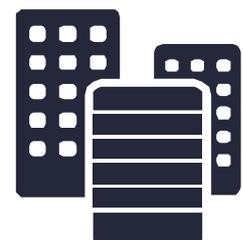
office layout, and a variety of working environments is essential to provide an agile workspace and enable legal workers to be at their most productive. 26% of legal workers are permitted to work at a standing desk in their workplace, only 9% are allowed to work in a co-working environment, and just 54% are permitted to work in communal/breakout areas in their workplace—all below the respective figures for the all sector averages. Without accommodating a variety of working styles at the workplace, legal talent will be underutilised.

In fact, nearly two thirds of legal respondents believe that if their current workspace matched their ideal workspace, this would have a positive impact on their productivity levels. Heads of Real Estate and HR are collaborating more closely together to fully consider legal workers' preference for office space, in order to make fully informed views on their next real estate moves.

64%

of legal workers feel that if their current workspace matched their ideal workspace, their productivity levels would increase.

“46% of those in open plan offices feel the office layout has a positive impact on their output levels, whilst this is the case for 88% of those who work in private offices.”





Savills Commercial Research

We provide bespoke services for landowners, developers, occupiers and investors across the lifecycle of residential, commercial or mixed-use projects. We add value by providing our clients with research-backed advice and consultancy through our market-leading global research team.

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