

REPORT

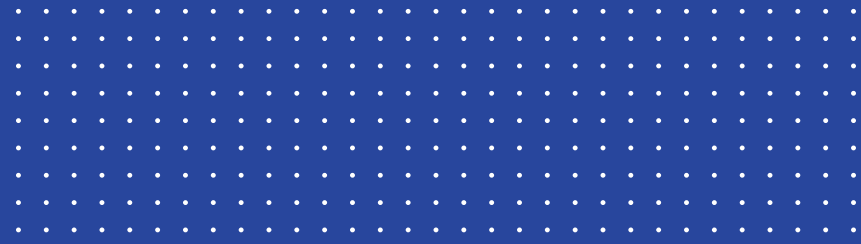
Mobility of employees

in the business services
sector in Wrocław





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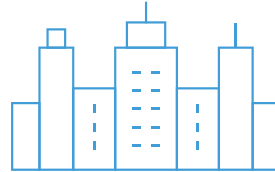
Introduction



What is the purpose for surveying the mobility of the business services sector employees in Wrocław?



Wrocław is the leading force of development in the region due to a diversified business environment, including a large and thriving modern business services sector.



Wrocław is the 3rd largest office and residential real estate market in Poland. Its constant development makes the question of proper communication between the workplace and the place we live in.



It is worth checking whether a convenient transport location of the office can be the employer's bargaining chip in acquiring and retaining candidates on a mature labour market.

ca. 40 000*

This is how many people, residents of the Wrocław agglomeration, work in the examined sector, and thus – shape the transport habits present on the streets.

ca. 5 700

This is how many people, employees of the modern business services sector, responded to the survey, which accounts for almost 15% of the total number of employees and indicates a huge interest in the chosen topic.

The mobility policy of Wrocław

Through the analysis of the transport accessibility of office buildings in Wrocław, the survey becomes a part of the city's spatial policy for the sustainable mobility of employees.

* Source: ABSL, 2017



What is the purpose for surveying the mobility of the business services sector employees in Wrocław?

In 2011, the Municipality of Wrocław carried out a Comprehensive Traffic Study (CTS) to identify the transport behaviours and habits of the city's residents.

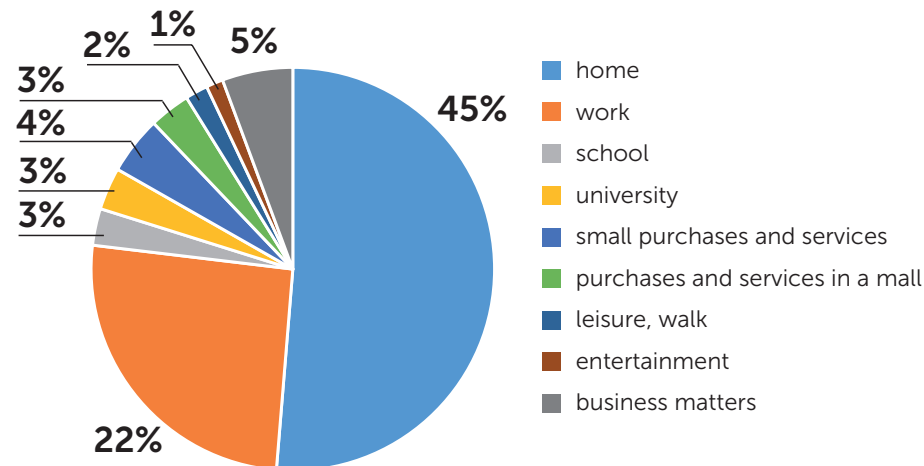
City travels on a work – home route were determined by the majority of respondents (67% in total) as the most frequent. This shows that investigation of the problem of workplace transport accessibility is of great importance, especially in the context of the modern business services sector, which is a part of the city's social and economical status.

The CTS in 2011 showed that the majority of respondents (42%) used their own car for moving around the city.

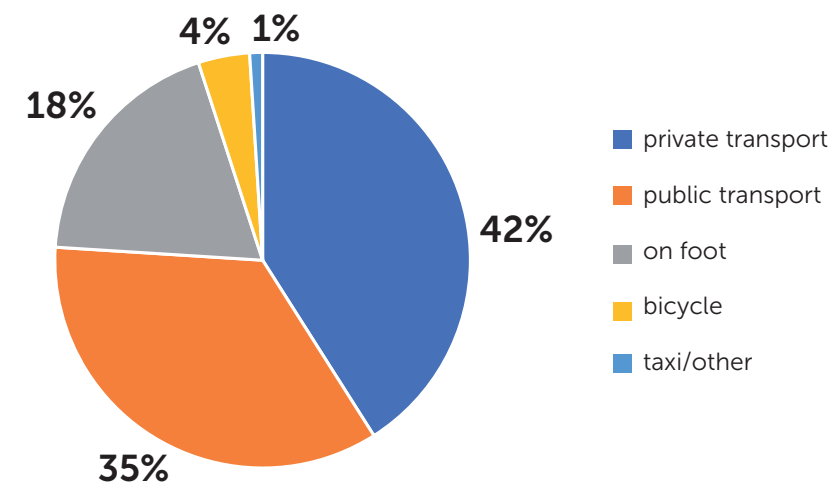
The survey of employees of the business services sector as a separate group of Wrocław residents shows that they **have a clear preference regarding public transport, because as many as 71% choose this means of transport on their way to work.**

Therefore, this report promotes the need to develop and consolidate mass transport networks in the Wrocław agglomeration, shows the meaning of the availability and mobility of employees on today's labour market.

Wrocław residents' travel destinations according to CTS, 2011



Preferred form of transport for residents according to CTS, 2011



Description of the survey

The survey was conducted in the 4th quarter of 2017 on a sample of 5 700 employees of shared service, IT, outsourcing, customer service and R&D centres in Wrocław.

The form consisted of 16 questions prepared in Polish and English, and gave the respondents the opportunity to share additional comments.

The question regarding the means of transport used on the way to work was a multiple-choice one, therefore the answers given to it do not add up to 100%.

This report, based on the analysis of the results of the survey, was created to show the mobility of employees of the modern business services sector in Wrocław.

The report is accompanied by an appendix indicating the directions of urban transport development, taking into account the needs of the business services sector and encouraging active support of sustainable mobility in Wrocław.

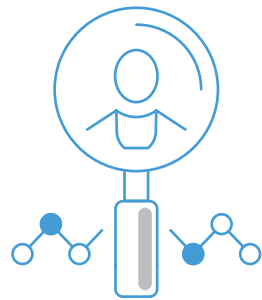


Survey questions

- How old are you?
- Is Wrocław your place of birth/upbringing?
- In how many companies / institutions have you worked so far? (not taking your current job into account)
- How important for you is the time of commuting between home and work when choosing an employer?
- How long does it take you to get to work?
- What means of transport do you use on your way to work?
- Where is your workplace located?
- If you live in Wrocław: what is your address?
- If you commute from outside of Wrocław: which city do you commute from?
- How many times do you change on your way to work?
- How long in total do all changes take on your way to work?
- What time do you leave the house to get to work?
- What time do you usually start your work?
- What time do you usually finish your work?
- Do you use carpooling sites?
- Are you going to use public transport in the future?



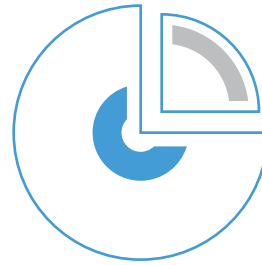
Respondents
of the survey
compared with the
general population
in Wrocław



5 700

**surveyed
employees**

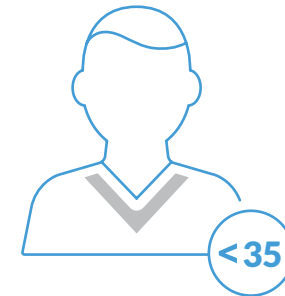
Wrocław is one of the most dynamically developing centres in Poland, which has its consequences in the constant increase in its attractiveness as a friendly place to live. This is a result of a long-standing strategy and positioning of the city in Poland and abroad as a – both social and business – „meeting place”.



75%

**born outside
of Wrocław**

Modern business services is one of the key economic sectors in Wrocław, including shared service, IT, outsourcing, customer service and R&D centres. Thanks to it, the capital of Lower Silesia is very popular, especially among young people who move here from different parts of Poland and the world.



72%

**employees under
35 years old**

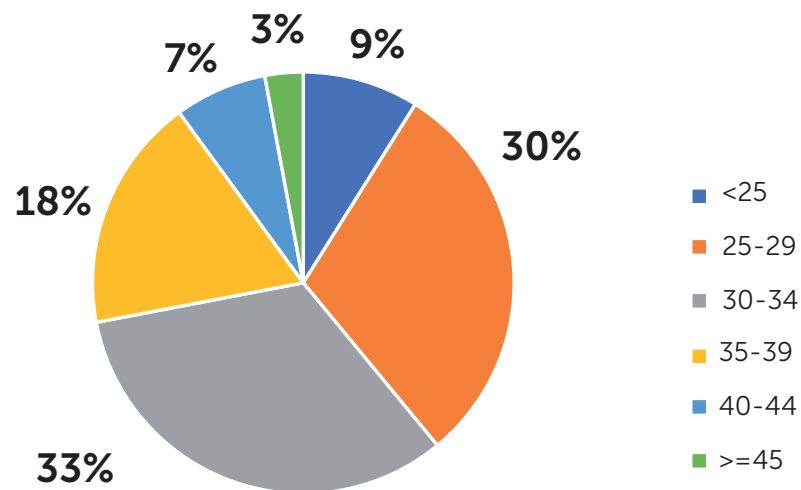
It is evidenced by the fact that among 5 700 surveyed employees, as many as 75% declared that they did not come from Wrocław. What is more, the vast majority of the survey participants (72%) are young people between 20 and 35 years of age. Wrocław creates opportunities for them to develop and build a strong professional position, and offers a vast range of leisure activities.

Age and work experience of the business services sector employees in Wrocław

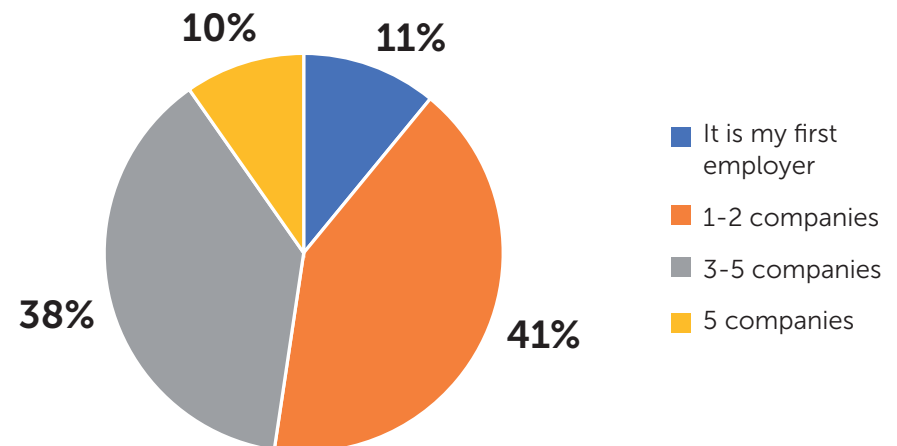
The survey participants are predominantly people up to 35 years old, accounting for almost 3/4 of all respondents. The dominance of young people is evident: the share of employees under 30 is almost 40%, while those over 40 constitute only 10% of people who took part in the survey. Almost as many respondents have not yet reached the age of 25, which, due to the specificity of the sector, implies that they are mainly working students.

Due to the young age of the employees, the modern business services sector seems to be a suitable place for getting the first professional experience. This is confirmed by the results of the survey. 11% of respondents declared that their current position was their first one, and 41% had been previously working for 1 or 2 companies. On the other hand, a significant mental change is noticeable: the younger generation changes work more often, and is not afraid of taking up new professional challenges. 38% of the survey participants changed the place of employment from 3 to 5 times, and 10% already had more than 5 employers.

How old are you?



For how many companies did you work, excluding the current employer?



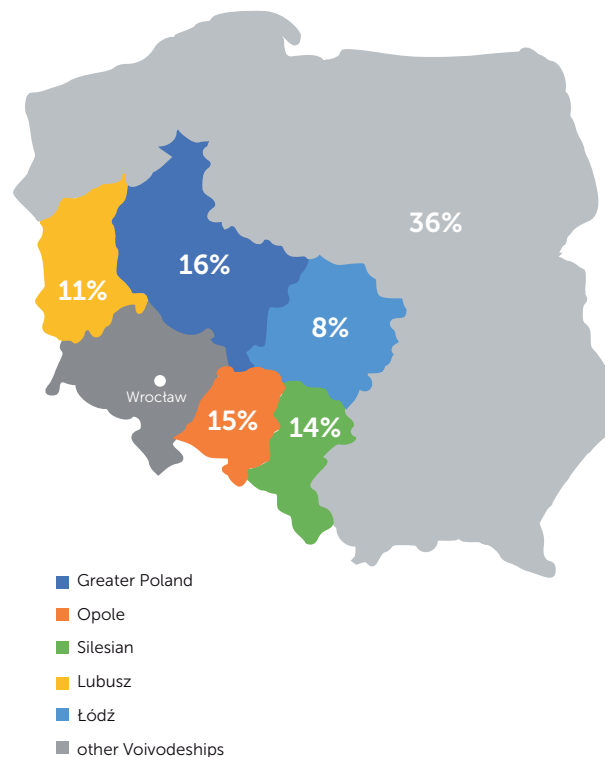
The business services sector as a magnet for talents from outside of Wrocław

Data of the Central Statistical Office shows that among the newcomers from outside of the Lower Silesia Voivodeship, the residents of neighbouring regions predominate, but there is also a large group of people – as many as 36% coming from other parts of the country.

According to the PESEL (Personal Identification Number) register kept by the Wrocław City Council, the share of the population coming from outside of the city amounts to 40%, and most of them were born in Lower Silesia.

Meanwhile, **among the surveyed employees of the modern business services sector, almost 75% do not come from Wrocław.** What is more, the percentage of population from outside of Wrocław is the largest in the group of respondents up to 30 years old.

Migrations to the Lower Silesia Voivodeship *



It confirms the growing popularity of Wrocław and the business services sector among young, educated people who are looking not only for good employment and development prospects, but also for rich cultural and entertainment offer in the city.

Such a high result strengthens the image of the city as an attractive and dynamic centre that has much to offer to both the residents and visitors. At the same time, it shows that the people working in the business services sector are characterised by much greater mobility, understood as a tendency to change their place of residence, than the statistics indicate.



* Source: CSO 2016

The place of residence of the business services sector employees as a natural consequence of the age structure

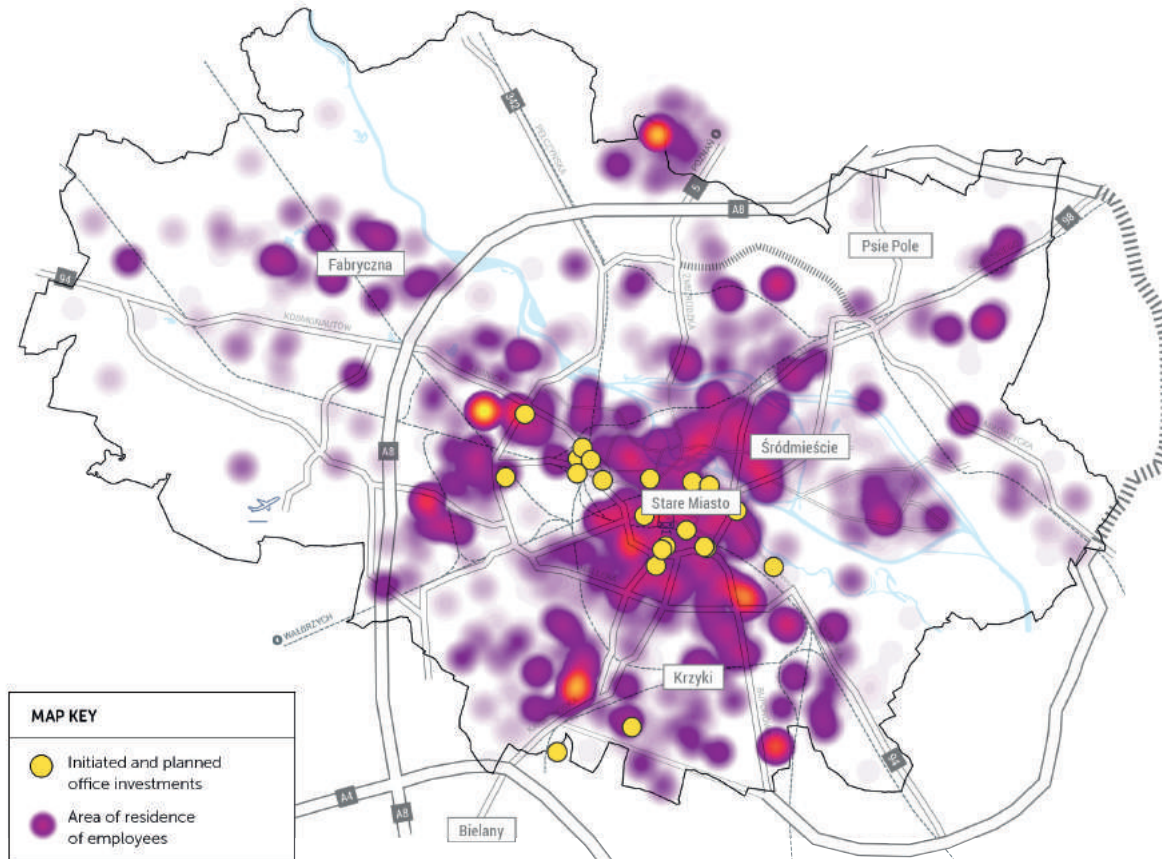
After having analyzed the postal codes indicated by the participants of the survey, it turned out that the majority of them live in the centre of Wrocław or its direct neigh-

bourhood, where they can benefit from the best accessibility of public transport and interesting free time activities. It is the result of the superior number

of young employees, among whom most persons choose the central location in the city as their place to live.

A high concentration of residence can also be observed in the western and southern parts of the city (in the Fabryczna and Krzyki districts), where numerous and affordable multi-family housing investments are located. This situation causes the development of other multifunctional infrastructure in those areas, including modern office spaces. Among the respondents, only 750 people live outside the city, and their profile differs significantly from the remaining employees. In this group, the percentage of people under 30 is only 20%, which is two times lower than for the entirety of respondents. This suggests that senior employees are the ones moving outside the city as they plan to start a family and look for quieter neighbourhoods to live in.

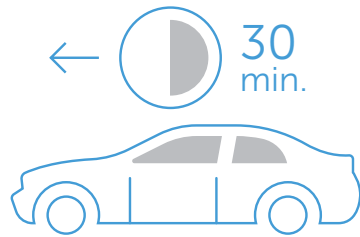
Heatmap of places of residence of business services sector employees





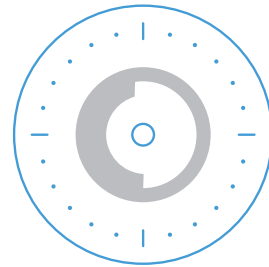
**Communication
habits of the business
services sector
employees**





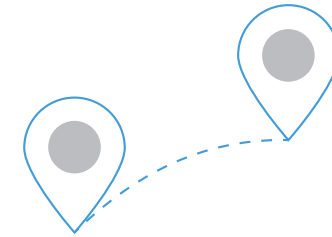
41%

commutes to the office in a time shorter than half an hour



60 min

psychological limit for the commute time



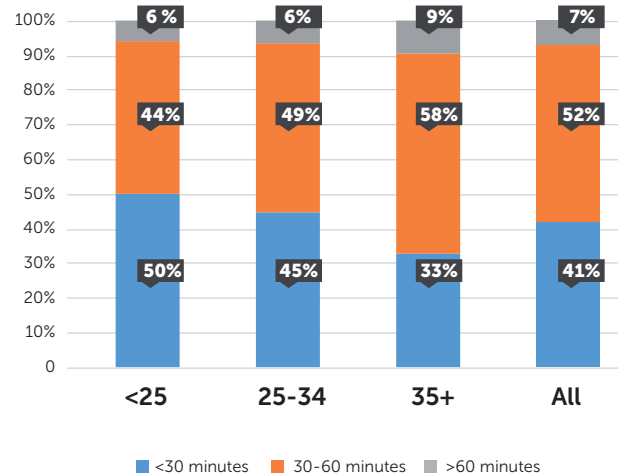
50%

commutes to the office without having to change

The conducted analysis shows that the largest number of respondents commute to the office within 10 to 30 minutes (38%), and within 30-40 minutes (27%). This time is the shortest for employees in the youngest age group, which is closely correlated with their place of residence.

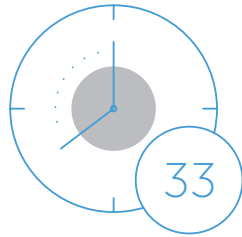
More than half of the respondents reach the office within the time longer than 30 minutes, while the psychological limit, above which candidates will no longer be willing to commute, seems to be around 60 minutes. In total, only 7% of participants of the survey decide to commute for such a long time, but this applies mainly to people over 35 years old.

Commute time and the age of respondents



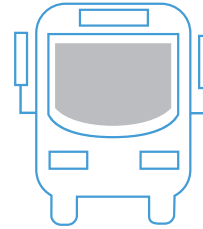
It can be stated that the respondents in this age group need the most time to get to work. They most often move to the suburban housing estates of Wrocław and beyond, thus experiencing the effects of limited transport accessibility of these locations.

At the same time, as many as 35% of the survey participants have the habit of working for more than 8 hours a day, and for this group the time needed to reach the office will be all the more valuable. Unfortunately, only half of the respondents commute without change, which is a baffling result, leaving a lot of room for improving the communication accessibility of office buildings in Wrocław.



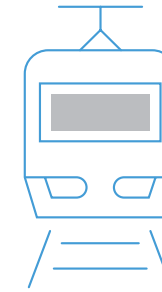
33 min

average time of commuting to office using city transport



71%

commutes using public means of transport



90%

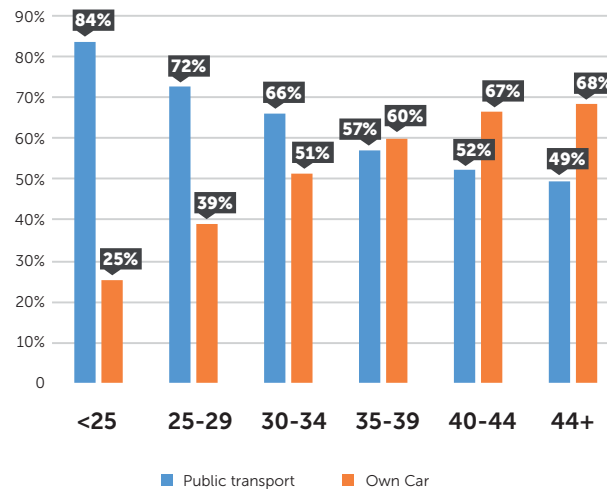
wants to use public transport in the future

Despite this, public transport proved to be the most popular means of transport among employees of the business services sector, as nearly 71% of persons declared that they commute by tram, bus or train on a daily basis.

At the same time, as many as 90% of respondents want to travel by public transport in the future, which indicates a high pressure on the development of the connections offered and the modernisation of rolling stock in the agglomeration.

Public transport is most often chosen by the youngest people: 84% use it regularly, and only 25% declare using a car.

Preferred way of commuting, depending on the age of respondents *



The percentage of users of public communication is gradually decreasing with age, and in the group of employees over 35 years old the trend is reversed in favour of own car.

The fact that the results presented in the chart do not add up to 100% indicates that the respondents pointed to more than one means of transport used on the way to work. It turned out that the vast majority of them use various forms of transport and adjust their choice to the current conditions, such as the weather or the season, but also reacts to changes in the quality and offer of urban and agglomeration transport infrastructure.

* The results do not add up to 100%, because more than one answer could be chosen in the survey

Choosing a means of transport based on the place of residence

Analysis of the choice of means of transport in terms of respondents' place of residence brings interesting conclusions. The maps below show that urban transport is most often chosen by those who live closer to the centre of Wrocław, while travelling by car becomes more popular in the suburbs.

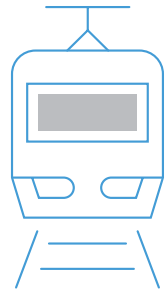
In addition, looking at the size of the circles on the maps, which indicate the number of people choosing a given means of transport, it is clear that among the BSS employees using public transport is much more common than using a car to get to the office.

Commuting using public transport



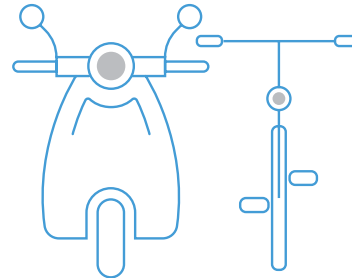
Commuting using a car





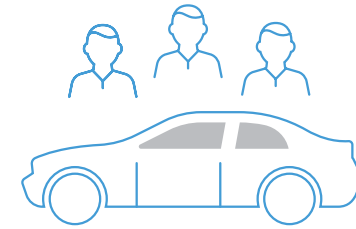
49%

chooses tram to commute



23%

commutes using a bicycle or a motorcycle

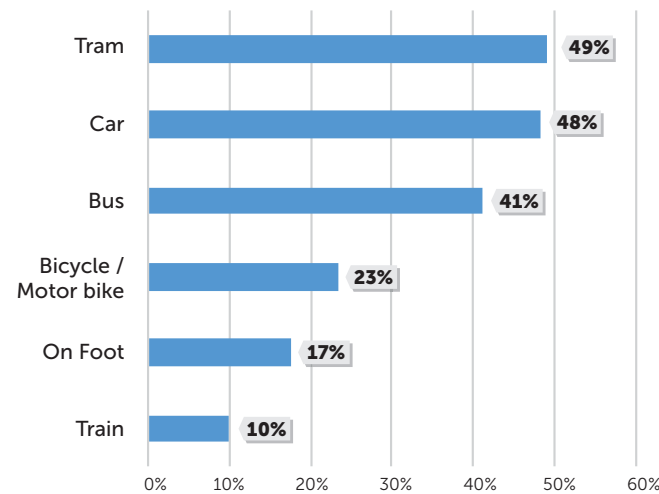


2%

carpools

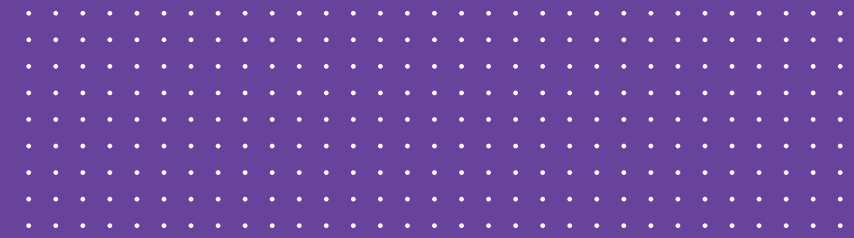
The choice of a particular means of transport also depends significantly on the location of the place of employment. Far fewer people commute by car to office buildings located in the city centre (35%), than in the case of facilities located outside of the centre, for which this percentage is over 50%. This is result of a preferences of the city policy towards pedestrians, cyclists and public transport passengers in the centre of Wrocław. Unfortunately, carpooling is still not very popular, although employers focus more and more on alternative ways of reaching the office and are willing to subsidise them in the form of incentive schemes for employees.

What means of transport do you use on your way to work? *



* The results do not add up to 100%, because more than one answer could be chosen in the survey.

In the case of Wrocław, the advantage of tram over bus as the most frequently chosen means of transport seems to be significant. It is a clear recommendation for decision-makers, who are faced with the choice of a new office location, to prefer those buildings that can be reached by tram easily and without changes. It is also worth to pay attention to the percentage of employees commuting to the office by bicycle or motorcycle, which amounted to 23%, because it shows a significant difference when compared to the results of the Comprehensive Traffic Study in Wrocław in 2011, in which only 4% of the city residents chose this form of transport.



**Transport accessibility
as a factor in choosing
an employer**

Office location is a key factor for the employees



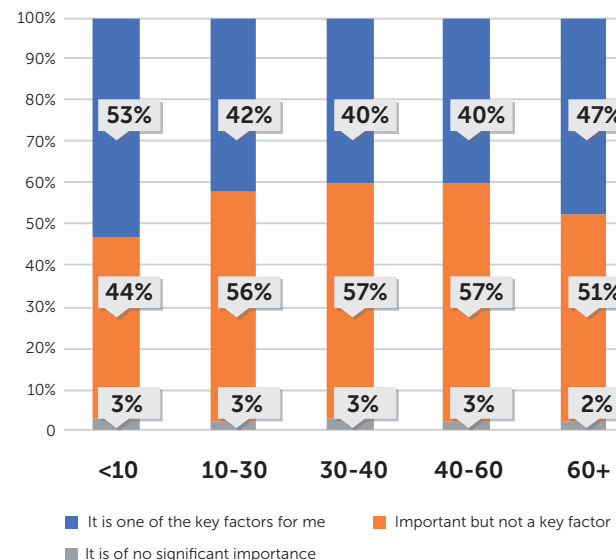
97%

defined the time of commuting at least as an important factor when choosing an employer

As many as 97% of respondents defined the time of commuting at least as an important factor when choosing an employer, while 42% of them considered it a key factor. This means that for potential candidates, the transport accessibility of the office building, in addition to the salary, the type of position offered and the range of benefits, is of great importance, which should be kept in mind not only by the employers but also by the developers wishing to invest in Wrocław.

When analysing the respondents' answers divided into the declared time of commuting, one can notice an interesting relation. It turns out that the transport accessibility of an office building is of the greatest importance for persons with the shortest (less than 10 minutes) as well as the longest (more than 60 minutes) commute.

Transport accessibility as a factor influencing the choice of employer and the current time of commuting to the office.



In the case of the first group of respondents, employers do not need to worry, because these people are rather satisfied with the current situation, so they will care about maintaining a convenient commute. If they are going to look for a new job, they will choose the locations that are well connected with their place of residence.

On the other hand, persons who spend a lot of time every day on their work-home route are in the group of the highest risk in the employer's eyes, because their answers indicate a high inclination to change the place of employment and search for an office location that is more easily accessible to them. In this case, giving the possibility to perform work remotely or introducing a system of benefits related to transport could be considered an effective employee incentive to attach them to the current employer.

Public transport hotspots and the location of new office buildings in Wrocław

Due to the importance of public transport and communication accessibility to BSS employees, an analysis of current timetables in Wrocław was carried out, in order to identi-

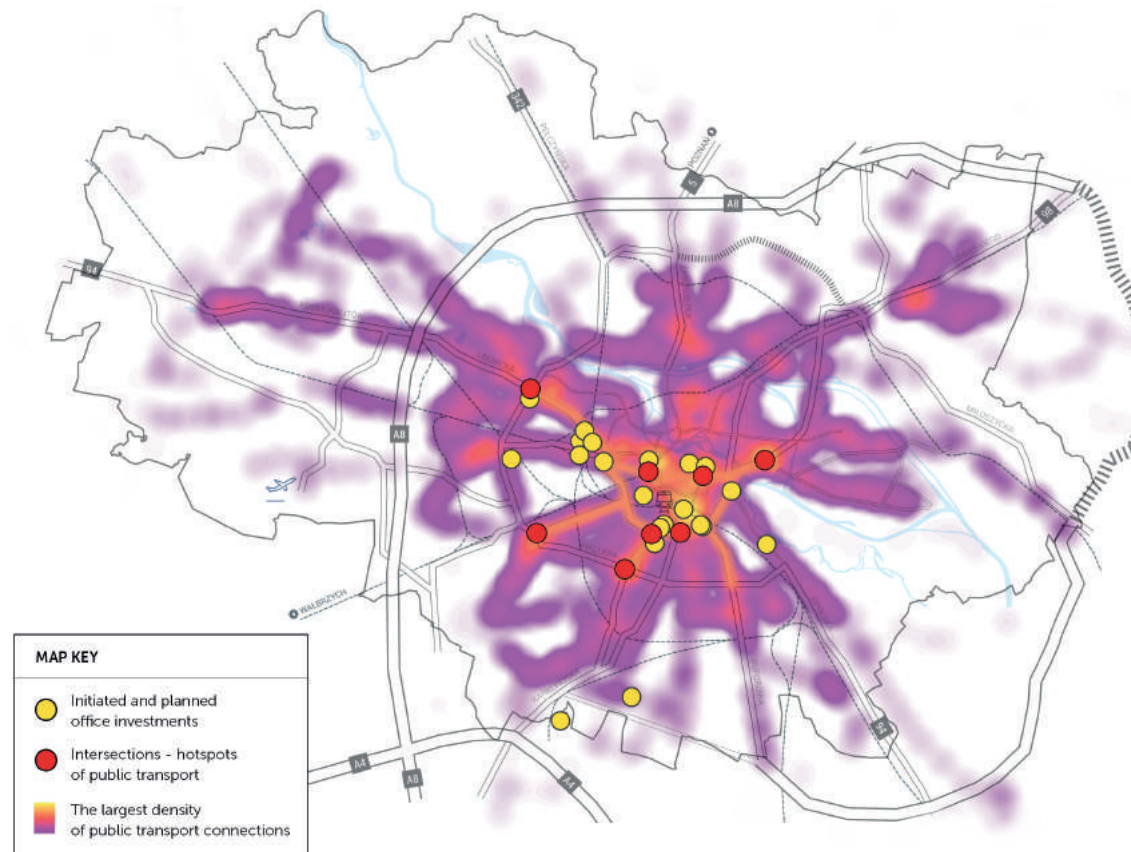
fy the areas of the city with the best communication, and compare them with the location of modern office buildings.

The most easily accessible areas of Wrocław are located along two main axes. The first one goes from Grunwaldzki Square through Dominikański Square, through Kazimierza Wielkiego, Ruska and Legnicka streets, to Strzegomski Square. The second one, with lesser intensity of the public transport traffic, goes along Pułaskiego, Piłsudskiego and Podwale streets to Jana Pawła II square.

The intersections with the best communication in Wrocław are: Grunwaldzki, Dominikański, Jana Pawła II squares and the area near the Main Railway Station and Arkady Wrocławskie. All of them are located in the city centre and present attractive locations for offices in the modern business services sector.

Outside of the central area of Wrocław, deserving a specific mention are the points located at the intersections of important arterial roads: between Legnicka and Na Ostatnim Groszu streets, Hallera avenue with Grabiszyńska street and Wiśniowa avenue, as well as the areas located along Powstańców Śląskich street.

Transport hotspots





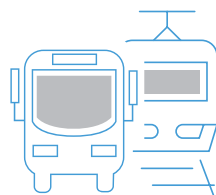
Conclusions

What did the survey of mobility of the business services sector employees show?



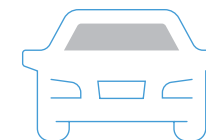
Many are not born and raised in Wrocław

The vast majority of employees of the modern business services sector do not come from Wrocław. Interestingly, the lower the age of the respondents, the more persons from outside of the city are among them.



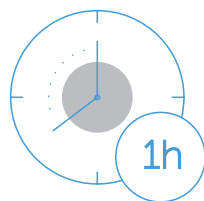
The majority uses public transport

The business services sector employees are primarily persons under 35, living in the immediate vicinity of the centre of Wrocław and commuting mainly by public transport.



It is hard to give up driving your own car

As many as 90% of participants of the survey declared that in the future they intend to commute using public transport, and at the same time almost 48% of them still use a car for this purpose.



They do not want to commute longer than an hour

60 minutes is a psychological limit that determines the acceptable commute time. Persons over 35 commute the longest. This is due to the need to take children to school before work and the lack of a direct connection within urban transport system.



The location of the office is an important factor

It turned out that the office's transport accessibility is of particular importance to BSS employees, especially if their commute time exceeds 60 minutes. This is a clear tendency for changing their place of employment.



Support for the eco-transport is required

The number of bicycle riders is increasing, but carpooling is still rarely used. Therefore, it is worth investing in incentive schemes and other activities aimed at increasing the popularity of new and eco-friendly forms of commute.

Transport accessibility and the Wrocław real estate market



in the context of acquiring the best employees. This means that the potential candidates, having a choice of a wide range of employment options, increase their expectations and pay attention to non-wage factors. In order to acquire talents, employers and developers of office spaces should ensure proper transport accessibility of buildings in which they operate. The proximity of public transport stops serving tram connections is of key importance. It is especially important for office buildings in the centre of Wrocław,

to which fewer people commute by car. As the survey showed, the location of the office is an important element in choosing an employer, so this aspect should be at the centre of attention of companies considering relocation in Wrocław or planning new investments in the city.

Wrocław is the third largest office market in Poland and a dynamically developing agglomeration. The high interest from tenants contributed to a significant increase in developer activity and office supply in the city. It is worth noting that as much as 35% of under construction pipeline is already secured by pre-let agreements. Therefore, the conclusions drawn from the report go hand in hand with the trends that we observe in the office market in Wrocław, especially in the modern business services sector. Increased tenant activity is a result of growing competition, also

905 800 sqm

supply of office space

at the end of 2017

286 000 sqm

office space under construction

at the end of 2017

169 500 sqm

total demand

in 2017

13,7-14,5 €/sqm/month

prime headline rents

Mobility of an employee on a demanding labour market

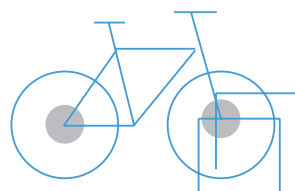
HAYS
Recruiting experts
worldwide

The problem of the workplace location appears more and more often during interviews with candidates. Employers operating in buildings with limited access are often rejected at the initial stage of interviews with the recruiter. The location of the office is a so-called hygienic factor. It is more important for it not to be too far away than to be ideal. Candidates may refuse a job offer requiring working in an inconvenient location, but they will not change their place of employment solely because of this. Therefore, employers are more and more often introducing incentives and facilities for employees, related to commute.

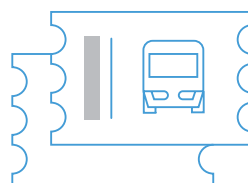
* Source: Hays Poland Salary Report 2018

Examples of benefits related to commute

STANDARD



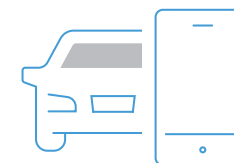
Infrastructure for bicycle riders



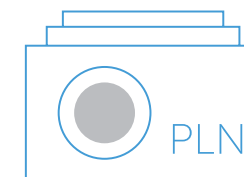
Co-financing commuting
using public transport

In addition, when thinking about the mobility, it must be kept in mind that more and more professions can be carried out in dispersed offices or remotely. Employers should be aware that they cannot miss the revolution taking place in the labour market. If the companies focusing on development and modern solutions, want not only to acquire, but also

OUT OF THE BOX



Applications supporting carsharing



Additional payment for a kilometre
travelled to work by bicycle

to keep the talents, they should already introduce changes aimed at better matching the work environment to the needs of employees. This is supported by the fact that on the list of preferred benefits, flexible work takes the second place, as indicated by as many as 52% of respondents.



Appendix

**Sustainable mobility
of Wrocław from the
business services
sector perspective**



The mobility policy of Wrocław and the modern business services sector

Adopted assumptions

The mobility policy of Wrocław indicates the directions of changes and shaping the mobility of the city's residents, as well as ways of solving transport problems. It should be implemented based on the creation of positive communication practices and the harmonious development of the functional area of Wrocław in terms of spatial structure, transport and the environment.

Overarching objective

Increase in the share of non-car rides in the total number of rides around Wrocław:

Was:
58%*
in 2011

Will be:
65%
since 2020

Means of implementation

- Stimulating the concentration of workplaces in the vicinity of public transport routes.
- A workplace close to place of residence, that is – creating multi-functional urban structures that meet the basic needs of residents without the need to travel long distances.
- **Encouraging large employers to create mobility plans for their businesses, that promote optimal employee commute.**

What does this mean for employers and employees in the business services sector?



* Source: Comprehensive Traffic Study in Wrocław 2011

Development of the public transport network and new office investments in Wrocław

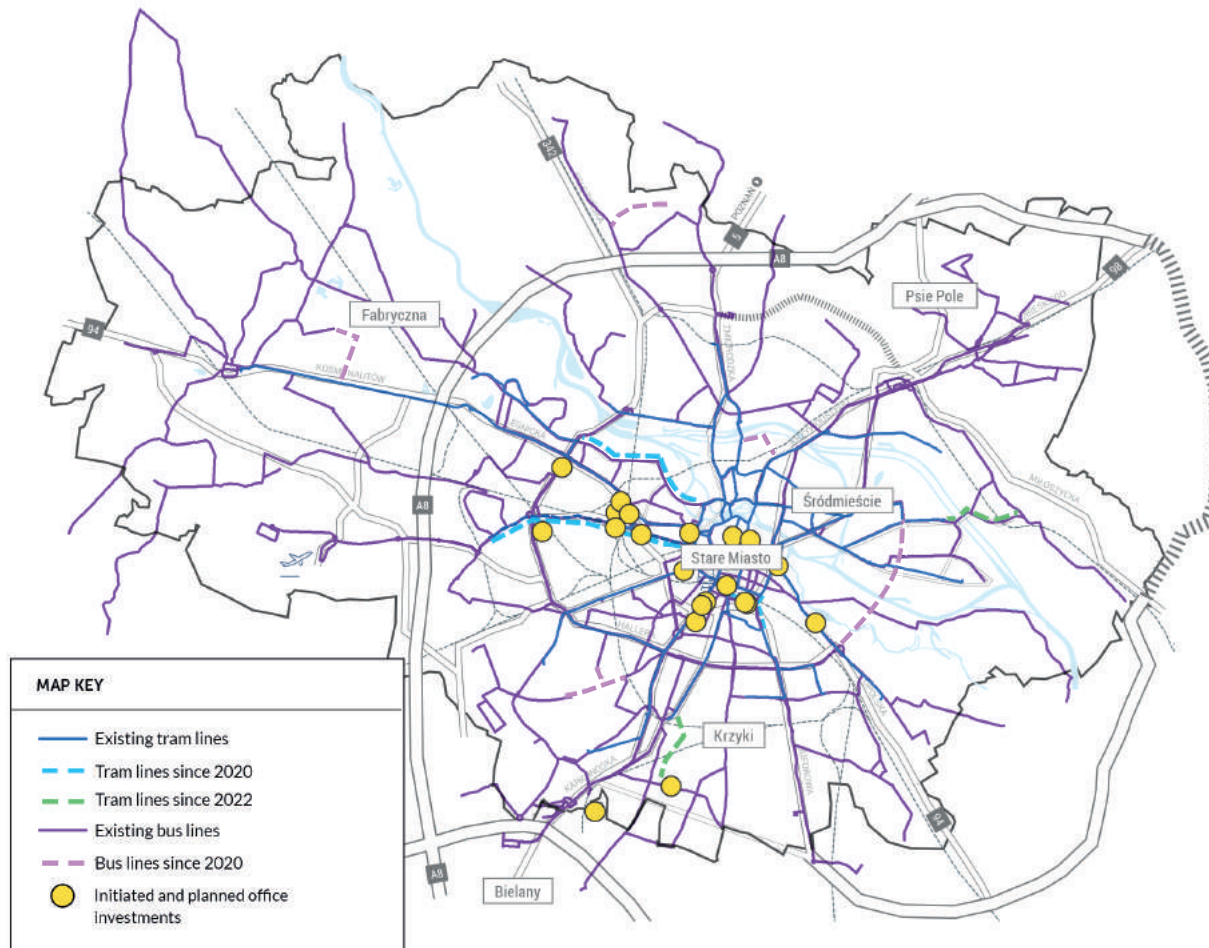
14,3 km

This is how many kilometres of tram routes will be constructed until 2022. The connections opened in 2020 will cover the following directions:

- through Popowice and Szczepin – an alternative public transport artery for Legnicka street,
- to Nowy Dwór – joint bus and tram route through Strzegomska Street, where numerous office investments are located,
- Hubska street – connecting Gaj and Tar-nogaj housing estates with Grunwaldzki Square without the need to change in the city centre.

By 2022, two tram projects will be implemented, connecting to large housing clusters on the outskirts of the city:

- Ołtaszyn housing estate, and further to Wysoka village,
- Swojczyce housing estate.



Wrocław Park & Ride system for the business services sector

Number of available and planned parking spaces in the Park & Ride system:

1014 spaces created since 2013

850 new spaces to be created by 2020

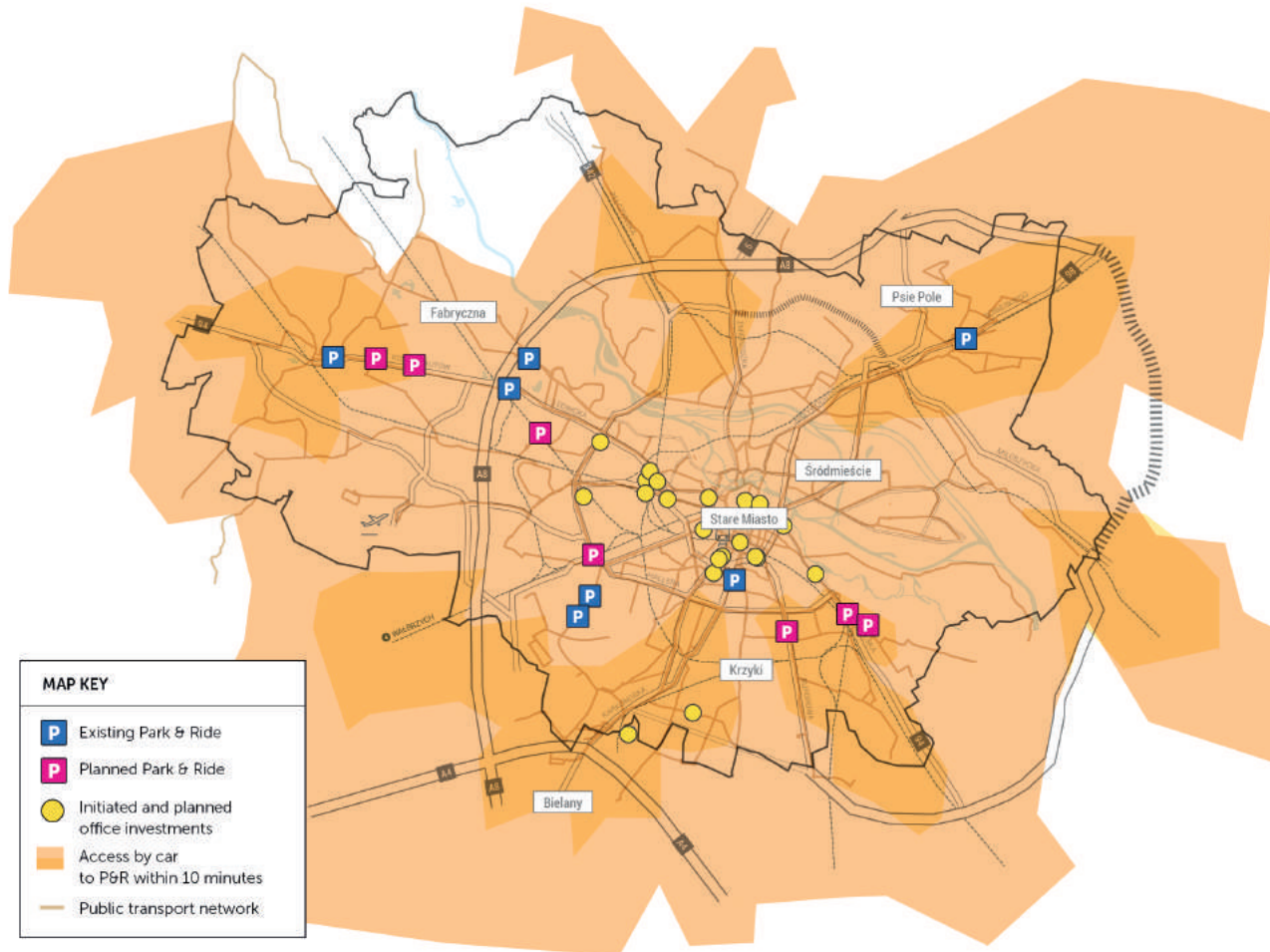
1130 spaces planned after 2020

Statistically, the lowest number of the business services sector employees live outside the city limits. The majority of them, however, are supporters of commuting by car.

This is due to the unsatisfactory inter-municipality communication network within the agglomeration.

Nevertheless, 90% of the survey participants want to use public transport in the future.

Therefore, the development a convenient Park & Ride system seems to be a key issue in terms of better job accessibility in the BSS for candidates living outside of Wrocław.



Bicycle accessibility of the city centre and the place of residence of the business services sector employees



Created in Wrocław until the end of 2017:

291

kilometers
of cycle routes

7 762

parking spaces
for bicycles

Wrocław City Bike:

Currently

81

stations

810

bicycles

After 2019

200

stations

2 000

bicycles

Two-wheeled vehicles quickly gain popularity as an efficient means of transport to work. This is confirmed by the statistics of Wrocław City Bike, the first public bicycle system in Poland, which recorded almost 1 million cases of renting a bicycle in 2017. What is more, plans of local authorities assume its more than double expansion.

Active participation of the business services sector in the creation of sustainable mobility

Sustainable Urban Mobility Plan (SUMP)*

It is a document drawn up and implemented by Wrocław authorities and local stakeholders, including entrepreneurs interested in the problem of movement of their employees.

Every employer can receive substantive support concerning the preparation of their own mobility plan, taking into account their individual needs and actions for promoting sustainable transport.

Works within the framework of SUMP are carried out from May to November 2018.

The role of employers in creating SUMP

1. Diagnostic stage

Survey among the submitted companies to identify:

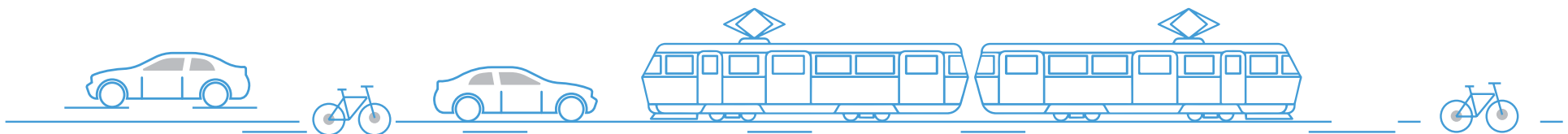
- mobility problems of employees,
- reasons for using their chosen means of transport,
- actions that should be taken to promote the desired communication behaviours.

2. Direction stage

Employers' participation in workshop meetings for the preparation of a plan project, taking into account the needs and recommendations for stakeholders.

Benefits for employers from participating in the creation of SUMP

- Support in putting together the local mobility plans and solving problems with public transport, pedestrian access and bicycle connections around the company's office.
- Meetings concerning SUMP are a platform for experience exchange, giving an opportunity to learn about modern methods of managing mobility.
- Image creation of a modern company, that cares for sustainable mobility of employees, as a distinguishing element on Wrocław market.
- Savings on renting/constructing employee parking spaces.



* ang . SUMP – Sustainable Urban Mobility Plan



Invest in
Wrocław

Wrocław Agglomeration Development Agency
Investment Support Unit
araw@araw.pl
+48 71 78 35 310



Katarzyna Krokosińska
Head of Wrocław Office
katarzyna.krokosinska@eu.jll.com
+48 660 661 183



Recruiting experts
worldwide

Tomasz Kowalski
Wrocław Branch Manager
kowalski@hays.pl
+48 722 277 444

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