



CUSHMAN &  
WAKEFIELD

Echinox



# **WORKING HABITS AND COMMUTING PATTERNS**

BUCHAREST | 2019

# SUMMARY

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BY SUB-MARKET

Bucharest is one of the most over-crowded cities in Europe, but also one of the most dynamic, with a real estate market reshaping the landscape. New office and residential projects are being developed at a fast pace, while local authorities are trying to offer their support by updating the existent infrastructure: new roads, metro lines and bridges.

The way people work became essential for the way people live, as people want to live and work in vibrant cities, offering plenty of opportunities for their careers, while also being interested in the quality of living.

Moreover, the way people work is essential for the health of the business environment, having a direct impact in turnover, profits and productivity. Success stories are a strong magnet for other success stories.

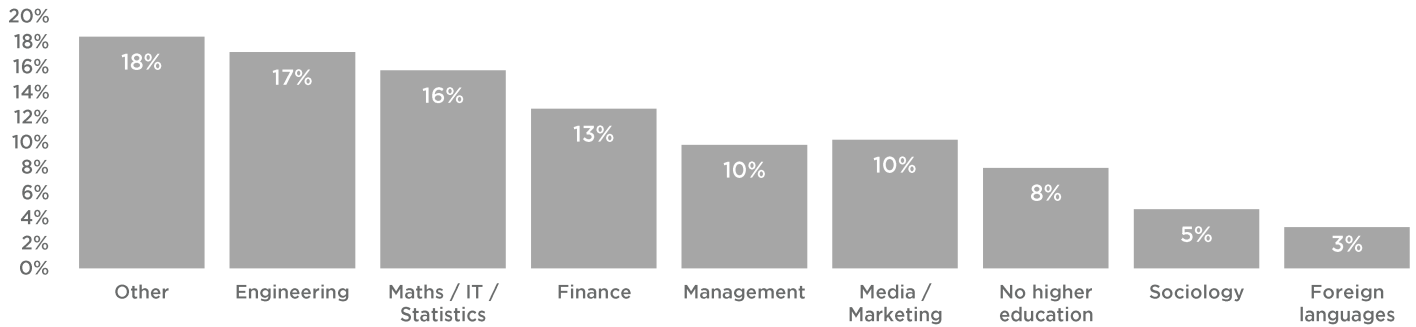
The first edition of Working Habits and Commuting Patterns creates the profile of the professionals working in Bucharest, the capital of Romania, a city with almost 3 million inhabitants and +1 million employees. A quarter of them, approximately 250,000 people, work in modern office buildings for large corporations or local companies, having a major impact in the local economy.

Considering the office pipeline, their number might reach 300,000 in the following 2-3 years. *Are developers, property managers and tenants prepared to meet their needs and expectations?*

## METHODOLOGY

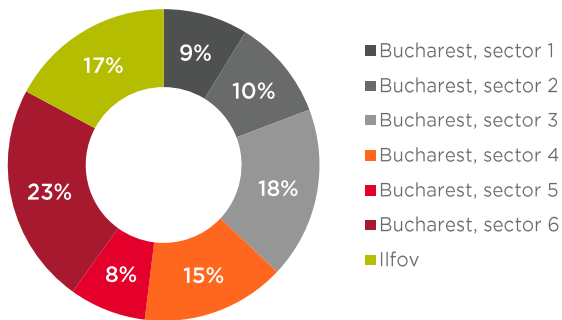
This report is based on a survey conducted between April and May 2019 on a sample of 543 employees working in modern office buildings in Bucharest. The report was conceived by Cushman & Wakefield Echinox, while the data was collected by MKOR Consulting, an independent market research company.

Are you a student or do you have a higher education diploma? In what field?

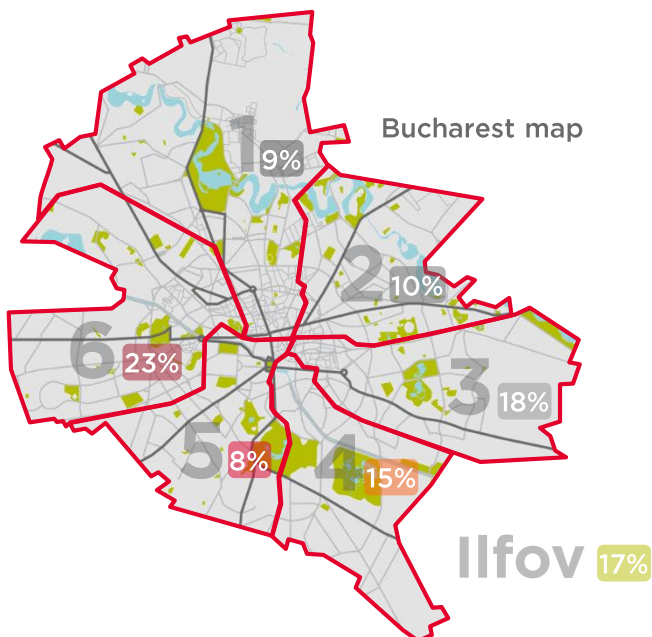


**92% of the employees have a higher education diploma or are currently enrolled in a higher education program**

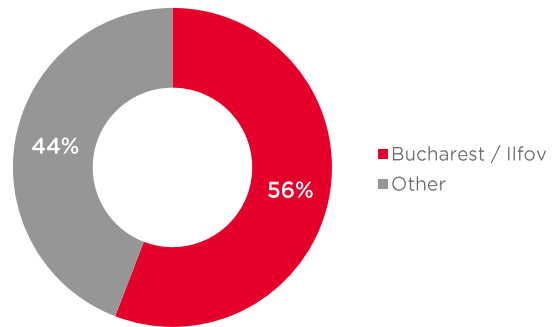
You are currently living in:



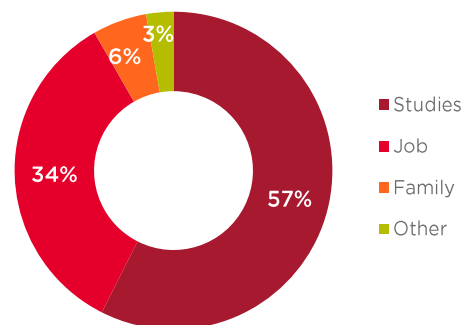
**Most of the employees live in Sector 6 (23%), Sector 3 (18%) and Ilfov county (17%)**



Where do you consider your "roots" are?



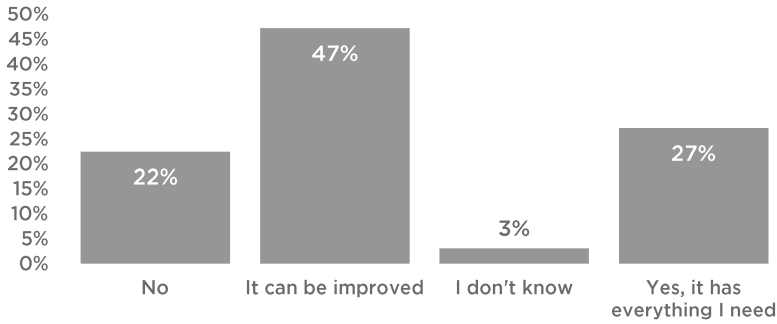
Why have you decided to move in Bucharest?



**Almost half of the employees have their roots in other cities and decided to move in Bucharest mainly for studies (57%) or employment (34%)**

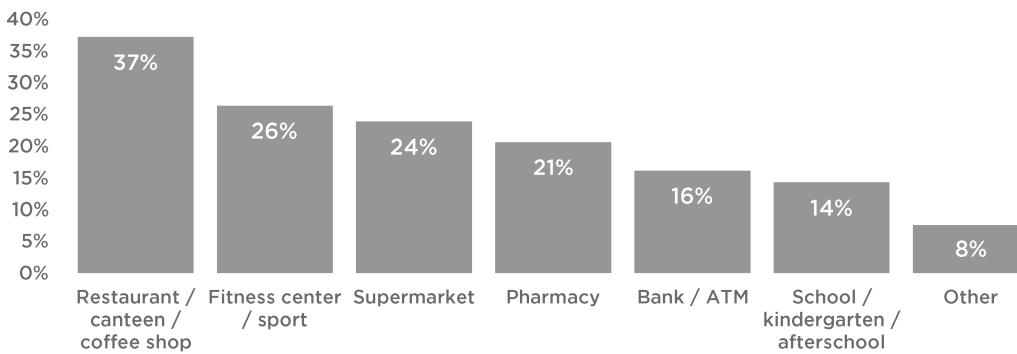
**34 years - average age of the surveyed employees**

Do you consider that the variety of services, leisure options and restaurants around your office is satisfactory?



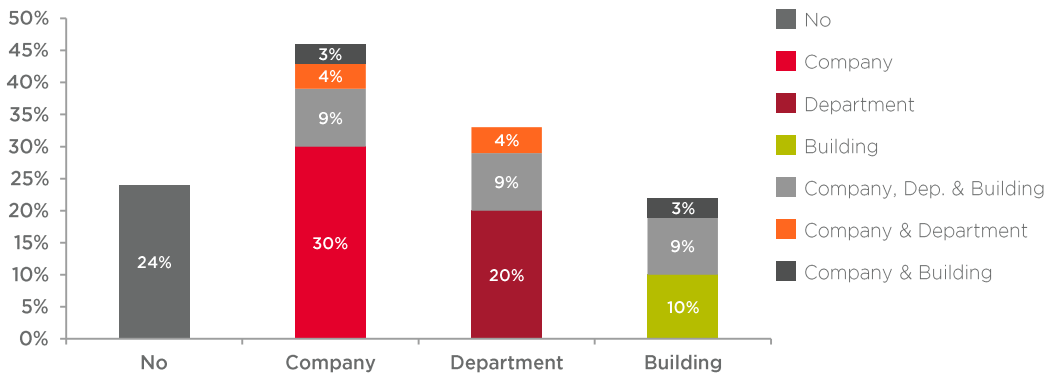
**Almost 70% of the employees are not satisfied by the amenities around their office**

In your view, what are the amenities and services needed around your office?

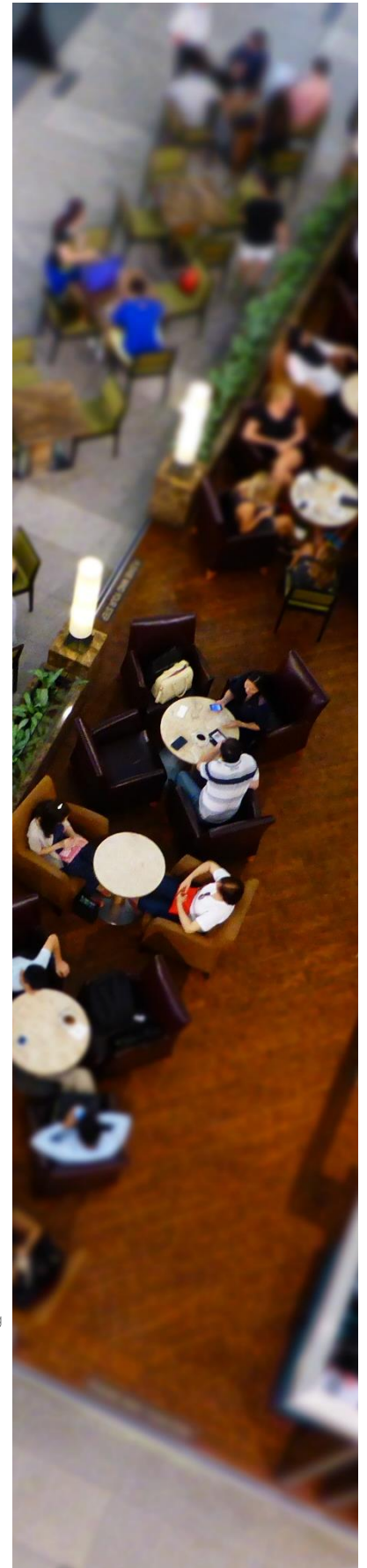


**Employees need more restaurants, fitness centers and supermarkets**

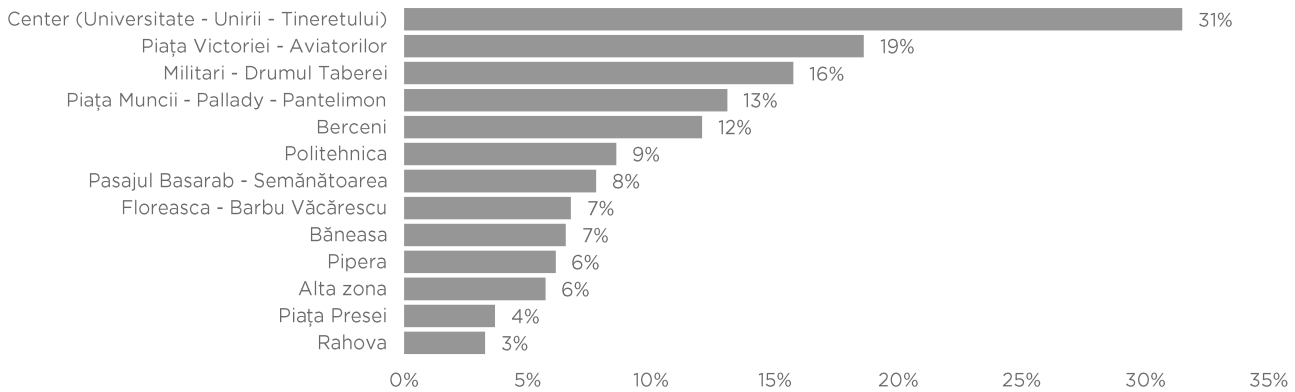
Would you like to have more activities with your colleagues during your spare time?



**Most of the employees (46%) prefer activities with their colleagues within the company**

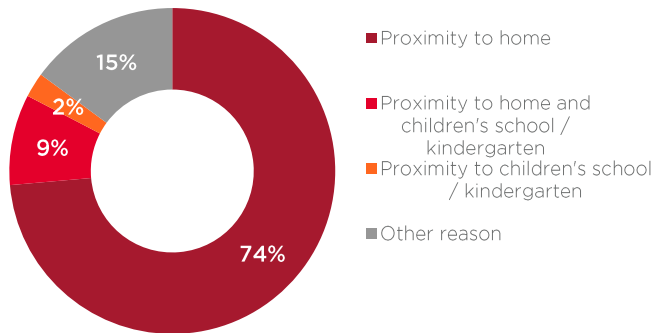


## In what area of Bucharest would you like to work, if you were the decision maker?

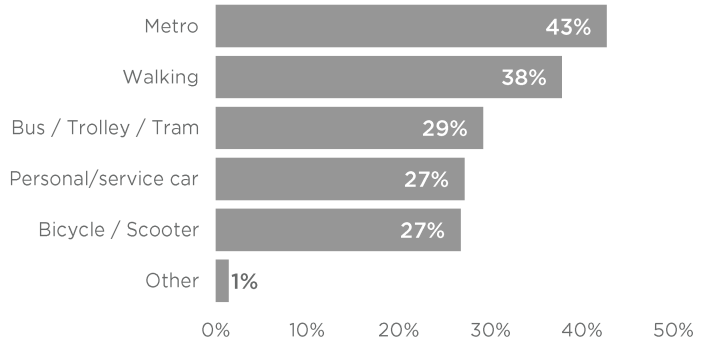


**Due to the ease of access from most areas of the city, the Center area and the CBD are the most desired office locations in Bucharest, followed by Militari – Drumul Taberei and Piata Muncii – Pallady – Pantelimon, where most of the employees live; only 25% of the employees are satisfied by their current office location**

## Why would you prefer to work in this particular area?

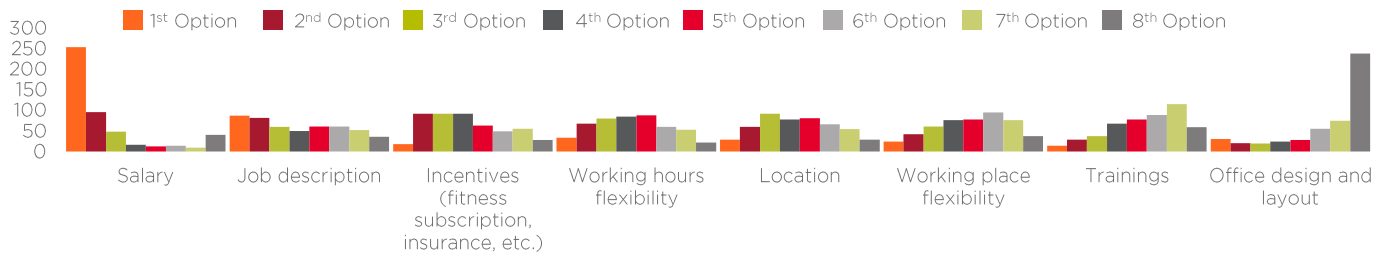


## If you worked in the preferred area, what means of transportation would you use for commuting?



**After metro, which is the first option in terms of commuting, employees would prefer to work closer to their home in order to be able to walk or ride a bicycle or scooter to their office**

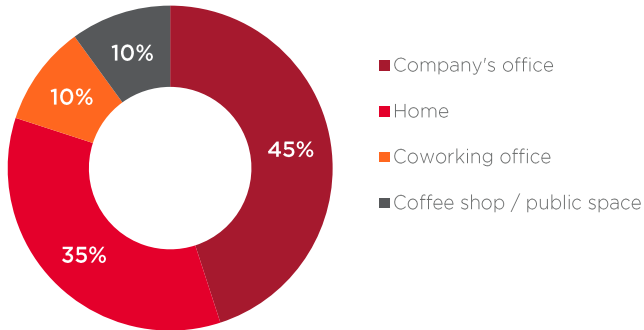
## Which are the most important criteria for you when considering a new job opportunity?



**Salary package and job description continue to be more important than office location and design**

# WORKING HABITS

If you had the possibility to choose the place where you work from, how would you split your working hours in a regular week?

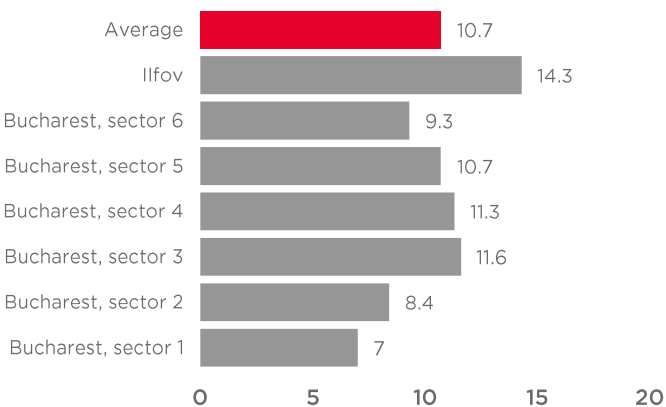


**Employees would rather work outside the company's office; coworking spaces start to become an option**



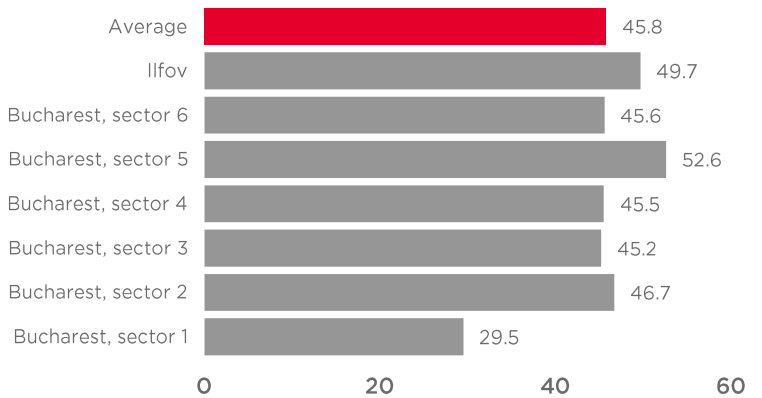
# COMMUTING PATTERNS

What is your commuting distance? (km)



**Employees from sector 1 and sector 2 live closest to their office**

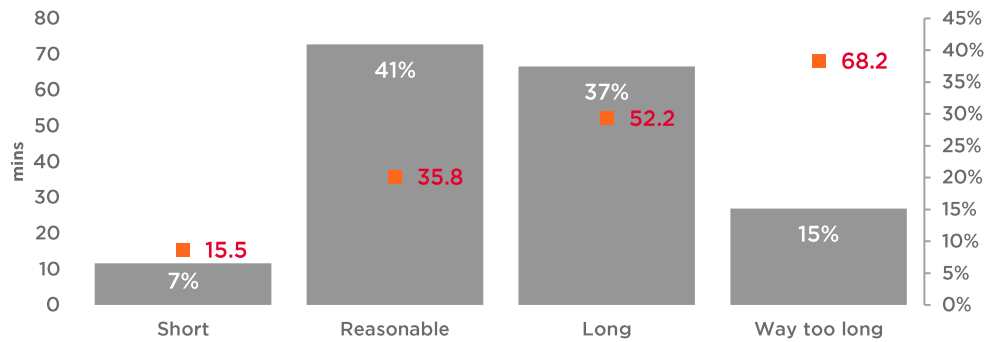
What is your average commuting time between home and office in a regular day? (mins)



**Employees living in sector 1 save 30 minutes per day for commuting between their home and office, back and forward, compared to Bucharest average**

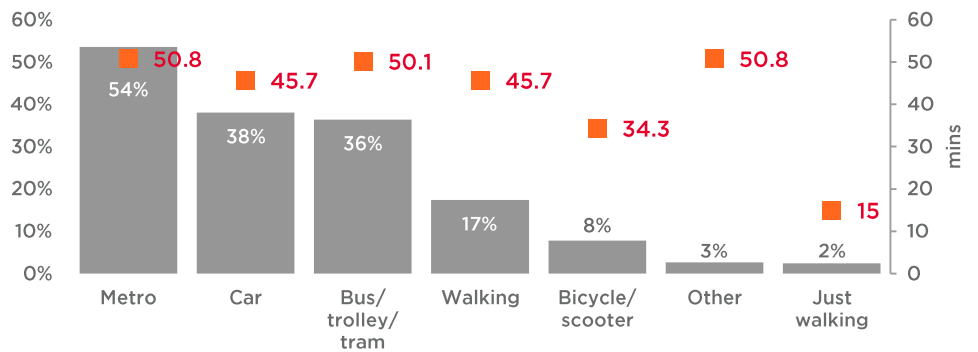


## How do you perceive your commuting time?



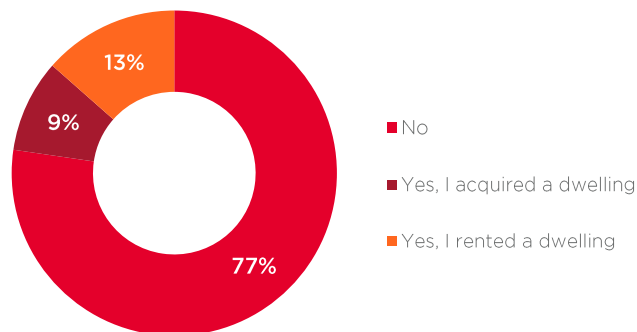
*More than half of the employees consider the commuting time is long or way too long, while 36 minutes is considered a reasonable period*

## What means of transportation do you regularly use for commuting?



*Most of the employees use more means of transportation for commuting. Only 2% of them live within walking distance from their office*

## Have you changed residence in order to reduce your commuting time?

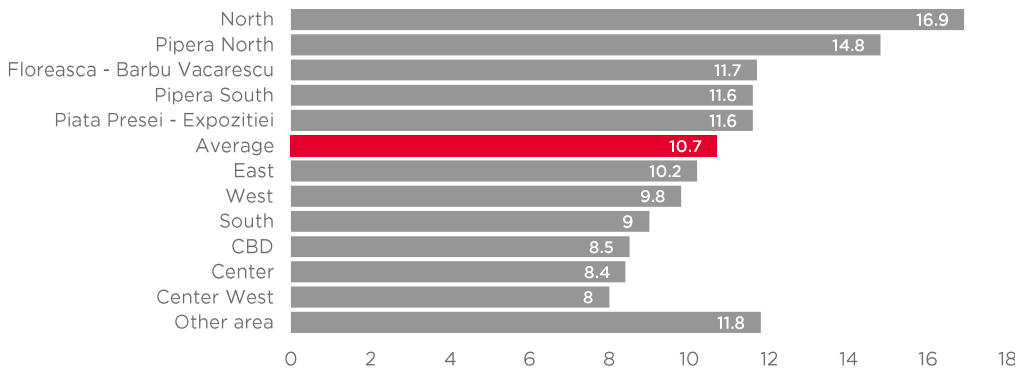


*More than 20% of the employees acquired or leased a dwelling to be closer to their office*



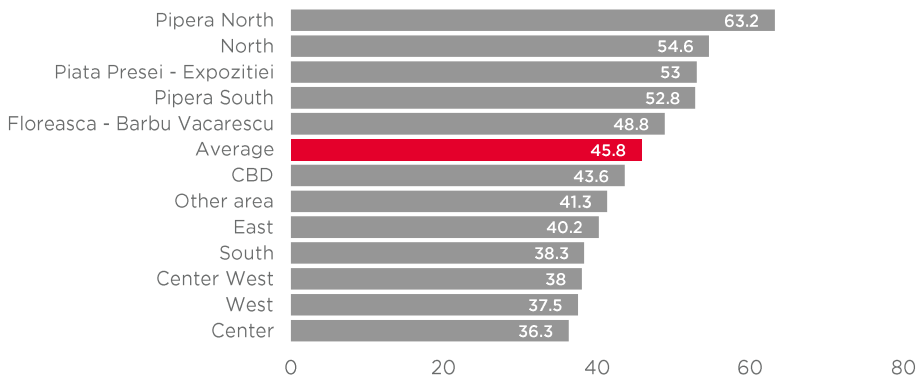
# COMMUTING PATTERNS BY SUB-MARKET

What is your commuting distance? (km)

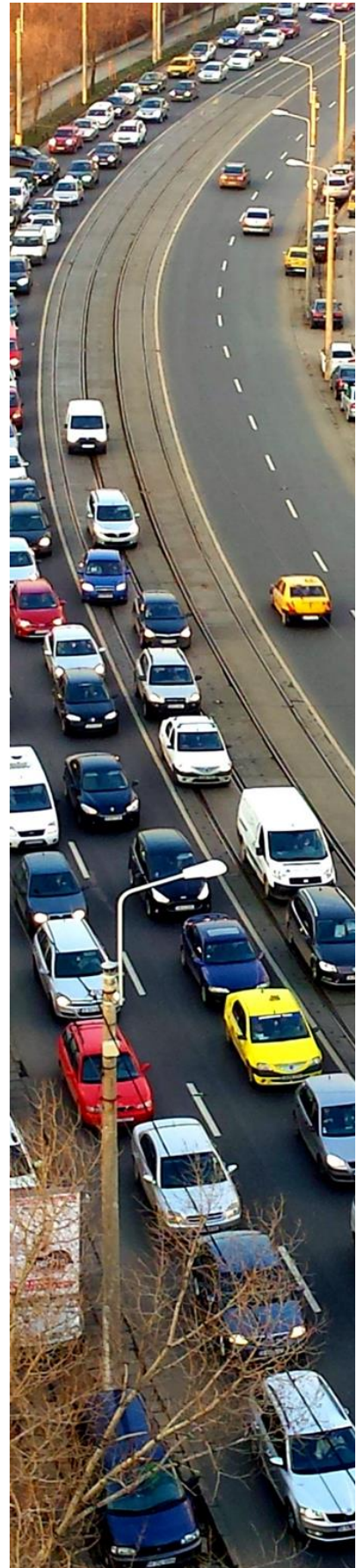


**Employees working in CBD, Center and Center West have the shortest commuting distance, between 8 and 8.5 km**

What is your average commuting time between home and office in a regular day? (mins)

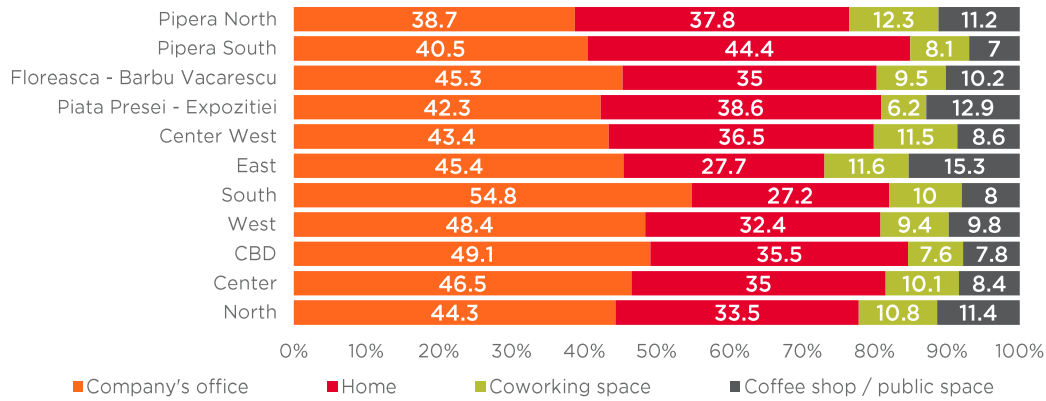


**Employees working in Pipera, Baneasa and Piata Presei – Expozitiei spend, on average, more than 50 minutes for commuting.**



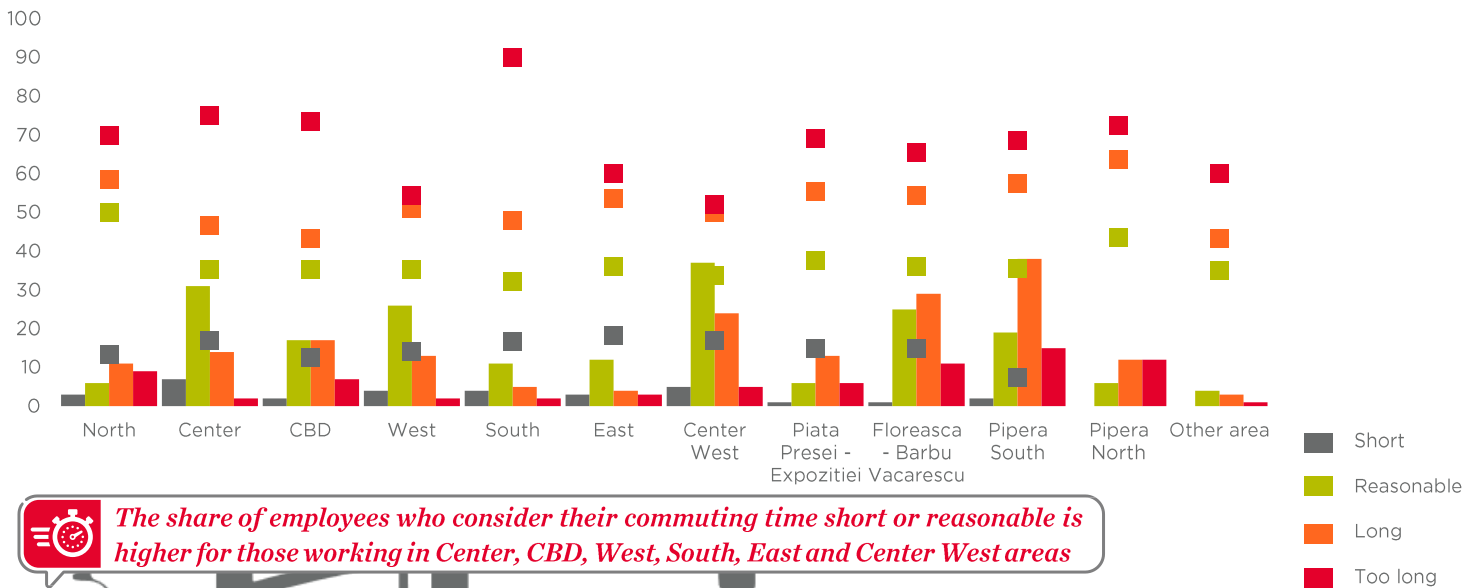
# COMMUTING PATTERNS BY SUB-MARKET

If you had the possibility to choose the place where you work from, how would you split your working hours in a regular week?



**Employees working in Pipera are the most keen on working from other places rather than from the company's office**

How do you perceive your commuting time?



**The share of employees who consider their commuting time short or reasonable is higher for those working in Center, CBD, West, South, East and Center West areas**



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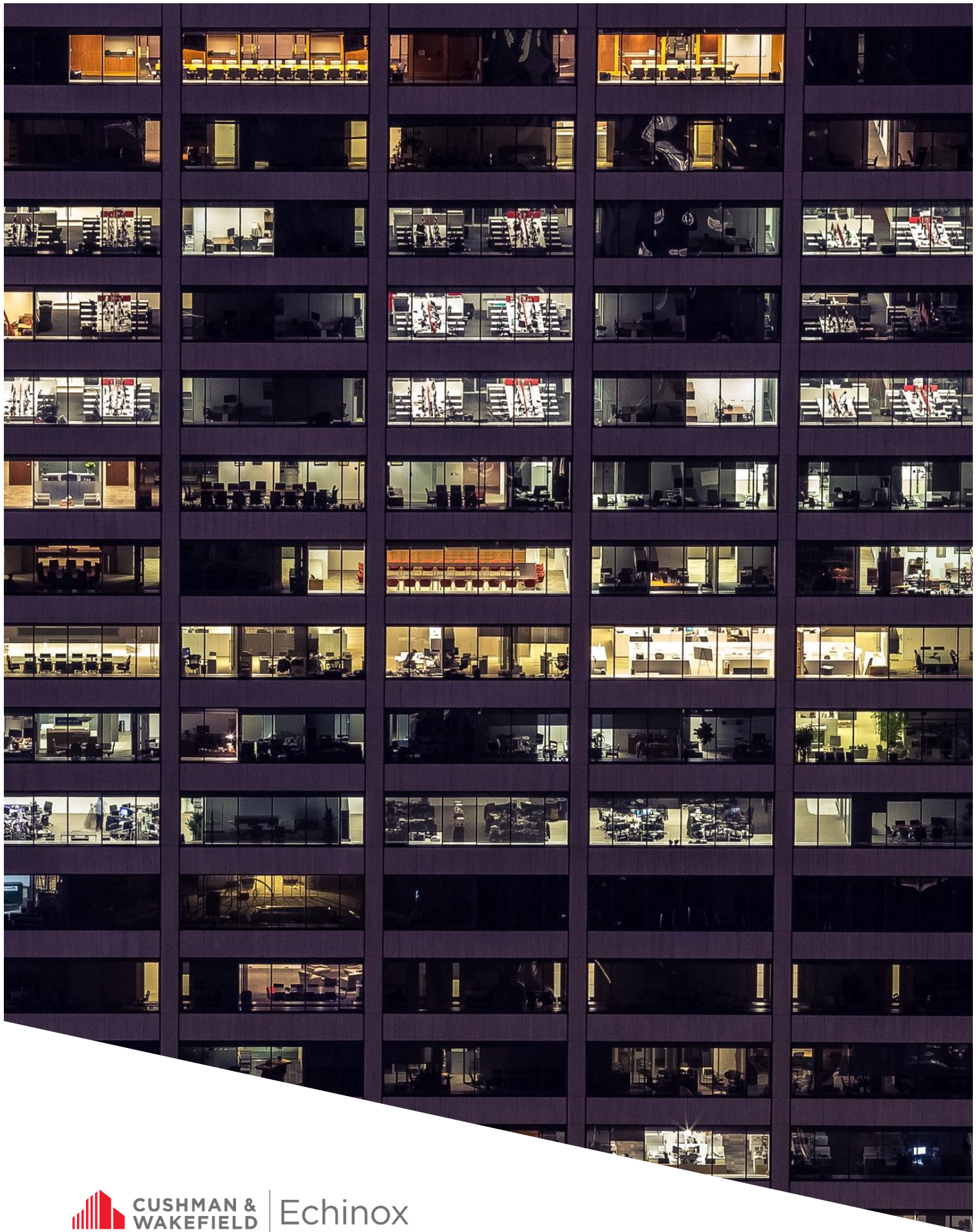
The Research Department follows the evolution of the real estate market, interprets the important events and anticipates the trends of the sector. During the last three years, the Research Department has conducted more than 50 customized reports for local and international investors, banks and European institutions.

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