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New Work

Konzepthaus Design Study (KDS)

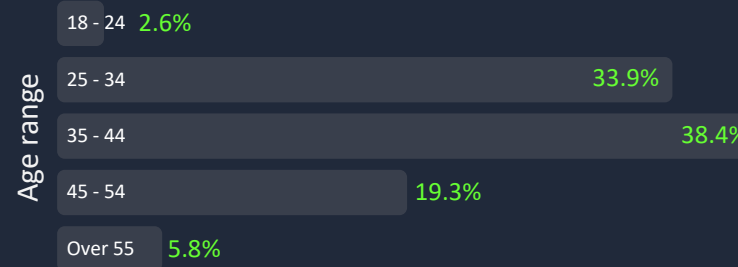
Konzepthaus Design Study (KDS)

The goal of the KDS is to create the most comprehensive, empirical overview of mobility design departments. The results are aimed to support global OEMs and suppliers alike to prepare their departments for the challenges of the coming years.

New Work

The KDS #2 (2022) focuses on the research field of 'New Work' and is divided into three chapters – the terminology 'New Work', the context of corporate culture and working environments. The data was collected via an anonymous online survey and can be regarded as representative and resilient, because 776 persons participated. The focus of the survey and this report needs to be seen globally, as people from 22 different countries took part. The data has been evaluated by the KIC experts and this presentation highlights our key findings.

Facts & Figures



KDS #2 (2022) – 'New Work'

'New Work' describes the **structural change** in our working world, caused by **changing demands and needs** of new generations.

Factors such as the **development of employees' potential, work-life balance, flexible working arrangements** (trust-based working hours and locations) and the **involvement of employees in decisions** are becoming increasingly important.

Broadly defined, new work describes **innovative approaches** to workplace design.



New Work Places

Open areas for exchange and meetings, quiet zones for concentrated work, and more.

Independent Employees

Hierarchies and strict guidelines make room for independent action and decision-making by employees.

Decentralised Working

Productive collaboration is possible over long distances.

Work-Life Balance

Employees' freedoms mean that boundaries between work and privacy become less clear.

Is New Work really **better**? What working **models work** best? How will New Work evolve over time? How does it **affect** the **mobility design industry**?

What do **companies need to offer** to the new generation of employees?



Terminology and context of 'New Work'

Question: 'What are the associations of New Work and what changes has it brought to the work environment?'

Design department

Full time employee and temporary employment

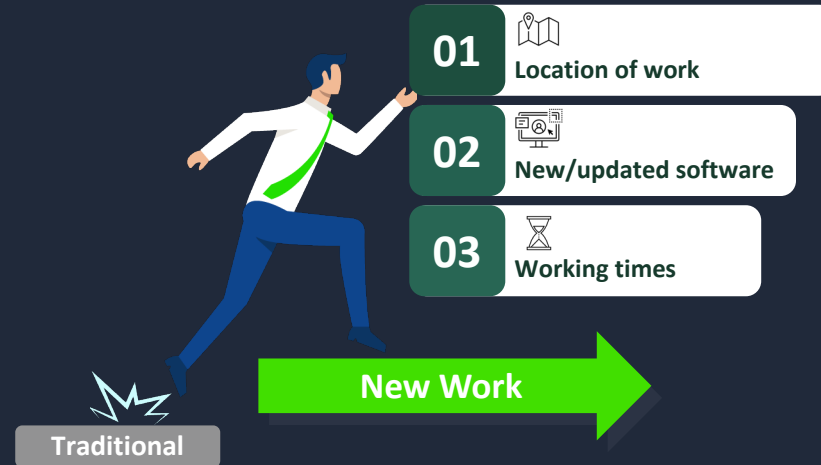
Automotive manufacturer, mobility manufacturer, automotive supplier

Worldwide

Association with the term 'New Work'

- Mobile working or working from home
- Work-life balance
- Digitalisation
- Breaking up classic office environments
- Self-organisation
- Self-development
- Flat hierarchies
- Crisis management

Most influential changes in the last few years



Who represents these trends



Martin Groschwald

'New Work is a term that has naturally been one of the biggest buzz words in the past 2-3 years. Many interpret this differently and for our study it was important to find a common ground from all participants.'

New Work touches all levels of expertise and ages, but it has become much more natural to the younger generation of team members within the design team. Hence, we need to make sure that this next generation of leaders within the design world are integrated in moving forwards with these new methods of working as soon as possible to achieve a lasting impact.'

Profiling of generations with new expectations

Question: 'What expectations with regard to your current employment do you have?'

Design department

Full time employee and temporary employment

Automotive manufacturer, mobility manufacturer, automotive supplier

Worldwide

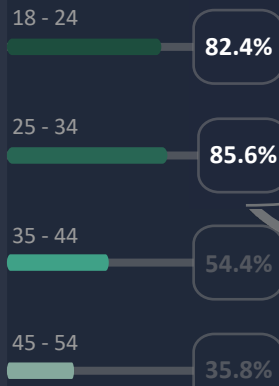
Profiles of the groups without leadership responsibility

No leadership responsibility



Junior/Specialist
Senior/Senior Specialist
Expert

Age distribution:



GEN Z
The youngest generation in the world of work (born 1995 - 2010).

In my current employment...

No leadership responsibility: Between the ages of 18 - 34

75.8% ...I would like to be able to shape the values and strategy of the company/brand I am working for.

73.0% ...I would leave my workplace, if my employer does not consider the subject 'New Work'.

70.5% ...I would prefer to get paid measured by my work deliverables.

I would...

Employment status: Freelancer and self-employed

59.0%

...prefer to get paid measured by the time I work

41.0%

...prefer to get paid measured by my work deliverables



Cora Walter

'We see that the majority of people with no leadership responsibilities are between 18 and 34 years old, a group also known as Generation Z. This generation stands out for their specific perspective on their careers, seeing success as achieving a work-life balance. They would be willing to change their employer if these values are not taken into account.

It also reveals that compared to freelancers and the self-employed of any age group, the majority of Gen Z prefer to be paid according to performance, regardless of employment status.'

Mobile working

Questions: 'Does your employer requires your physical presence on-site?'
'What motivates you to work from home?'

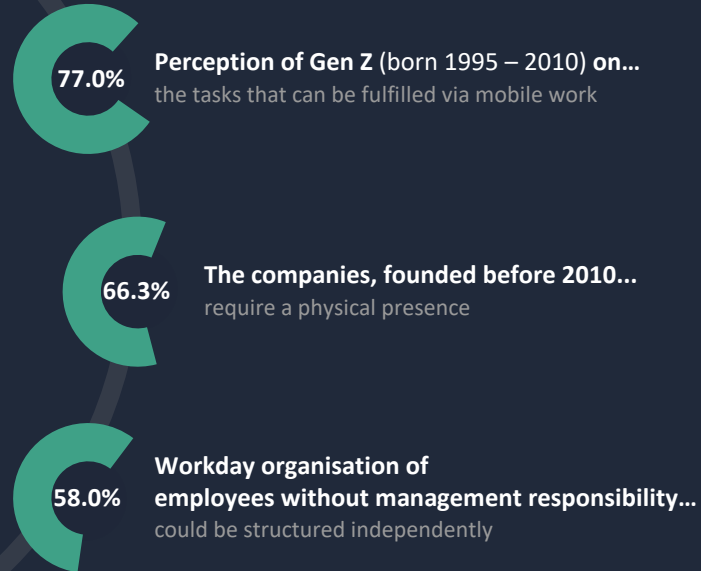
Design department

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Automotive manufacturer, mobility manufacturer, automotive supplier

Worldwide

Work environment



Motivation to work from home



Moritz Hausel

'There is a clear difference in the classical work practices of traditional companies compared with the current understanding of the new ways of conducting work. Two-thirds of these companies require a physical presence on-site, while the younger or more junior employees know both how to manage their daily work and that such tasks can be accomplished regardless of location.

Considering the most relevant motivating factors for working off-site, the necessary trust of the employer towards the employee is essential. They can arrange their own working hours under appropriate circumstances and thus possibly even achieve higher quality results due to the more intense focus. Exactly such behaviour is what 'New Work' means.'

Office space organisation

Question: 'What kind of seating organisation would you prefer in the design department?'

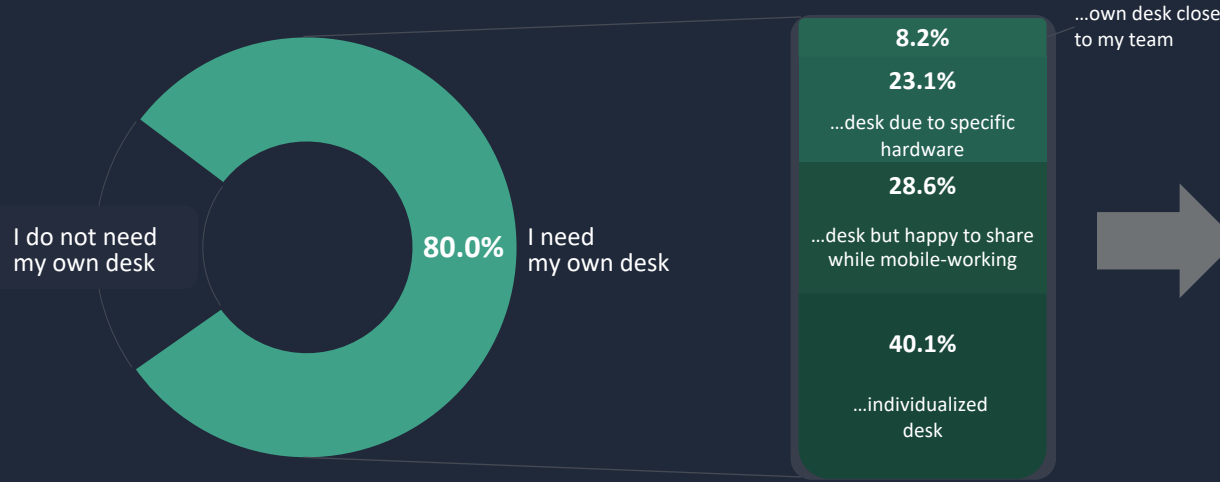
Design department

Full time employee and temporary employment

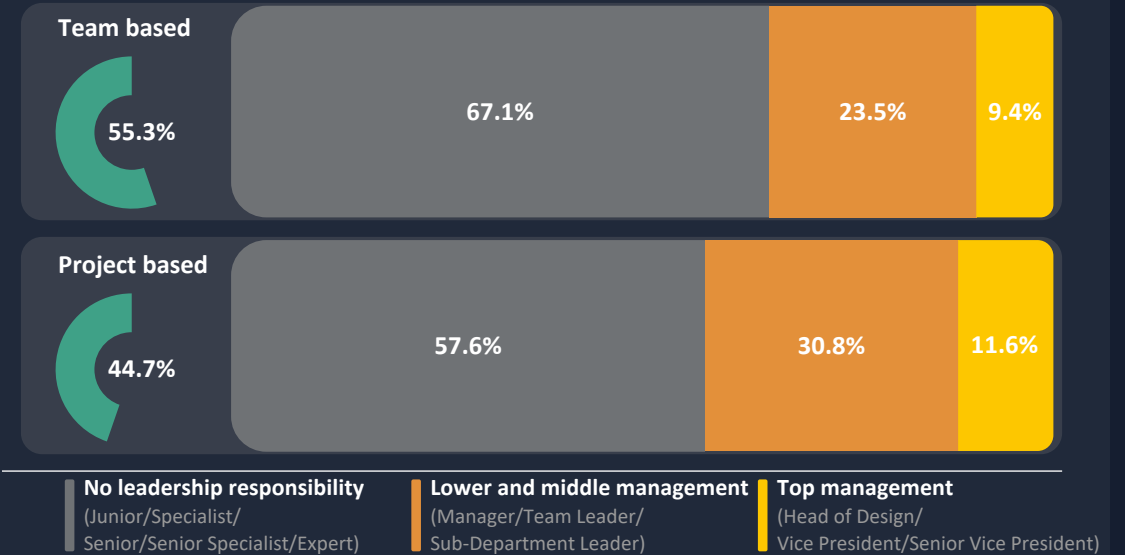
Automotive manufacturer, mobility manufacturer, automotive supplier

Worldwide

Desk arrangement



Seating arrangement



Oliver Vogt

'Design teams hate 'hot-desking'. The reasons for this are, both the strong wish to create a personalised and inspiring workplace, but also practical aspects such as the correct setup for graphic tablets and monitors. However, many people do not mind sharing their desk while working remotely. When it comes to the question of seating arrangements, the result is not so clear. Most of the employees with no leadership responsibility seem not to favour a project-based seating arrangement, but the management prefers it. But where should you sit if you are supervising projects at different locations?'

Flexible work environment

Questions: 'From your perspective, who should be on site the most?'

'Does the management treat employees who work on-site differently to those working mobile?'

Design department

Full time employee and temporary employment

Automotive manufacturer, mobility manufacturer, automotive supplier

Worldwide

Preferred place of work

Comparison of who should preferably be present on-site

Leadership responsibility

(Manager /Team Leader/Head of Design/
Vice President/Senior Vice President)

56.0%

Working on-site preferred

No leadership responsibility

(Junior/Specialist/
Senior/Senior Specialist/Expert)

41.7%

Behavioural patterns

Management's attitude towards the employees' place of work

Management has a preference for mobile working employees

3.1%

Management has a preference for on-site working employees

39.7%

Management is treating everyone equally

57.2%



Florian Teufel

'The fact that employees with leadership responsibility should be more on-site than employees without this responsibility is, in my view, both valid and important with regard to the topics of guiding, communication and collaboration. However, the fact that almost 40% of those asked stated that an on-site employee is 'treated' better is a logical negative consequence for me but should be viewed critically.

A manager and leader should treat every employee equally.'

Field specific variation in on-site presence

Question: 'How many days does your employer require you to be physically present on-site?'

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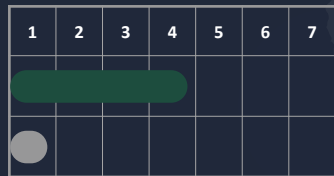
Automotive manufacturer, mobility manufacturer, automotive supplier

USA vs. Europe

USA

Comparison of the employer's regulation with the employees' preference for physical presence on-site

Weekdays:



Ø 3.8 days/week
Employer's regulation

Ø 0.9 days/week
Employees' preference

Europe

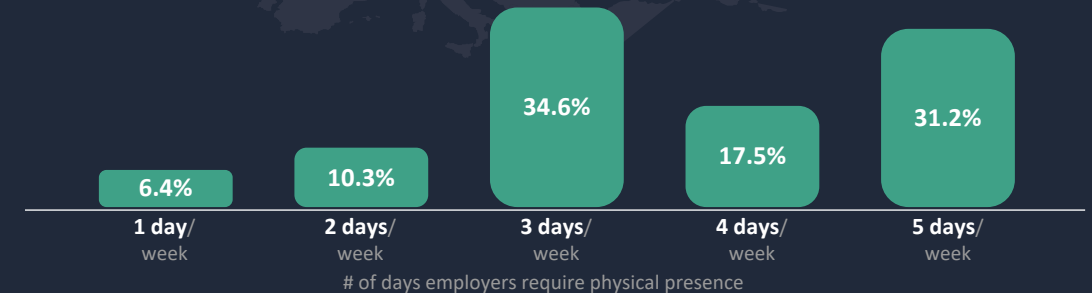
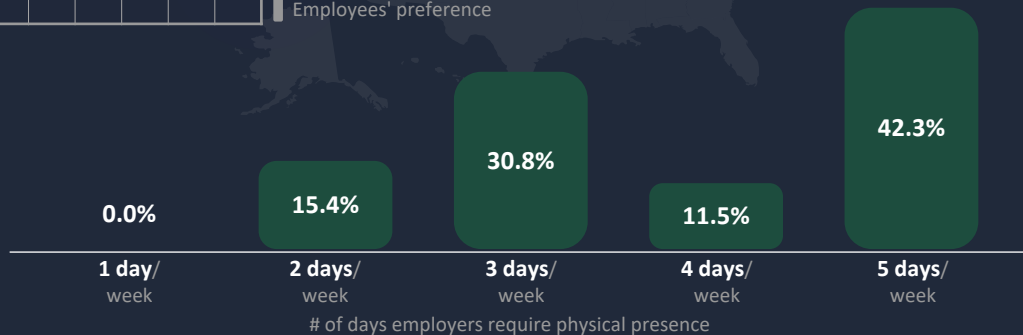
Comparison of the employer's regulation with the employees' preference for physical presence on-site

Weekdays:



Ø 3.6 days/week
Employer's regulation

Ø 1.3 days/week
Employees' preference



Oliver Vogt

Two things are worth mentioning here: First of all, there is a big discrepancy between companies and employees when it comes to physical presence. You can expect this to be a source for dissatisfaction and constant matter of discussion!

Also astonishing is the high percentage of US design studios that want their people to be on-site full time. This aspect is seemingly more relaxed in Europe.!

Your KDS Team



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