JLL®

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Global Research

Shaping Human Experience

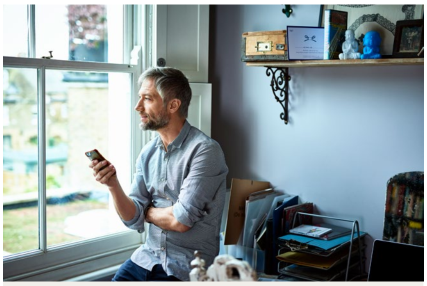
A focus on hybrid work and four emerging worker profiles

2020: Hybrid work is the new normal, but it is a multi-faceted reality

In our new research involving a survey of 2,000 office workers across the world, we have learned that hybrid work and work from anywhere is the most desirable path forward.

66%

want to be able to alternate between different places of work post-pandemic



72%

want to work from home from time to time (+ 34% compared to pre-COVID)

40%

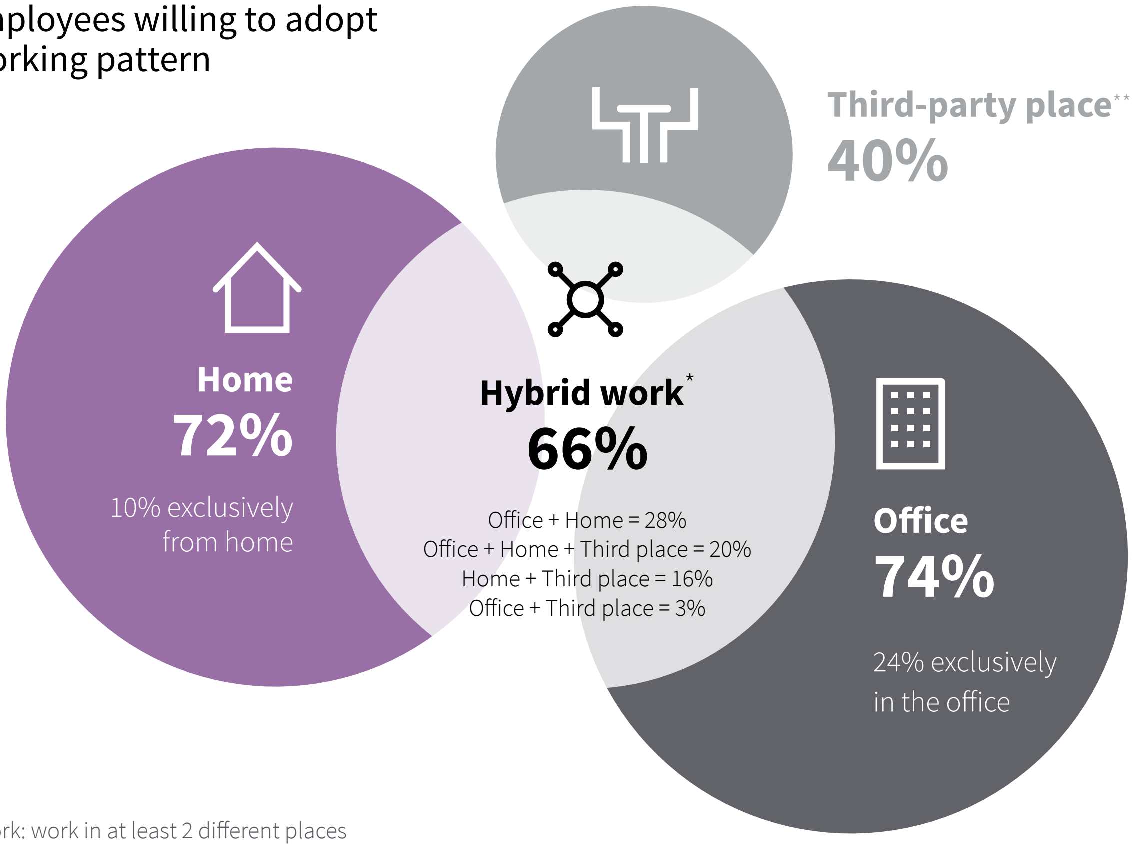
would like to be able to work from a third-party place such as a coffee shop or a coworking space (+11%)

These new employee preferences are compelling employers to urgently adapt to the reality of new working patterns:

- **Choice**, in terms of where people work, is becoming central to the company 'promise'
- **Homeworking** stands out as a key option to offer to employees
- Despite the strong preference for greater flexibility, very few would consider working remotely full-time
- **The ability to go to the office remains fundamental.** 74% of employees agree with this, while 24% will want to work exclusively in an office and will not look for alternative places to work
- **The interest in third-party places**, as an alternative to an office or employee's home, will gain momentum

After COVID

% of employees willing to adopt each working pattern



*Hybrid work: work in at least 2 different places

**Third-party place: café, hotel lounge, coworking facility, etc.

Q. How often did you work remotely before the pandemic? How often do you expect to work remotely after the pandemic?
Sample : All respondents n= 2033

Overall, remote work should double, going from 1.2 days pre-pandemic to 2.4 days a week post-pandemic. Most of this nomadic work will happen at home: 72% of employees want to continue working from home, 2 days a week on average. Remote work will also take place in alternative places such as coworking facilities: the habit will become popular among a growing percentage of employees (from 30% pre-crisis to 40% post-crisis).

However, these new working patterns cannot be decoded as a uniform reality. Strikingly, our research shows that not all places of work attract the same worker profiles:

The office remains a central place for older employees (above 50 years old) who remain more traditional in their workstyles.

Homeworking is a popular choice in the tech and web industry (the early adopters of remote working) and in more traditional industries like heavy industry, consumer products and banking and insurance that consider homeworking an appealing complement to office work.

Working in a third-party place is clearly a new trend for the youngest part of the workforce. It is generating a lot of interest among 25-34-year-olds and even more in the 18-24 bracket. For many it is a stylish way of working, especially attractive to the tech and web industry but also to employees working in the consumer products field.

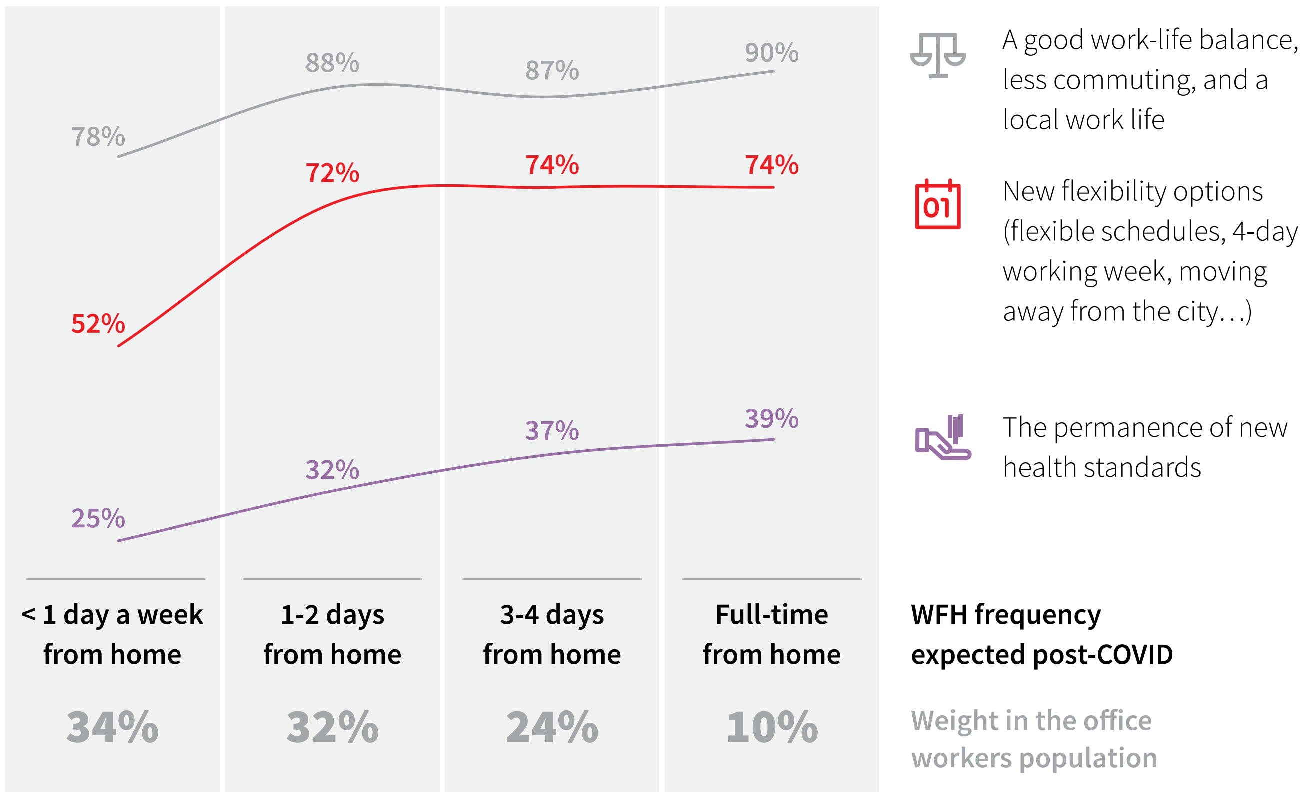
A great quest for quality of life which needs to be carefully supported

Homeworking will be a key component of the new hybrid work patterns. Its adoption has been accelerated by the pandemic to a level we could not have imagined a year ago.

The eagerness for this new way of working has been driven by growing health and well-being concerns, including the fear of the virus. The workers voicing the highest expectations in terms of new working routines (no large in-person meetings, digital interactions when possible…) and new office standards (physical space separation, no desk-sharing…) are also the ones most frequently envisaging a recourse to homeworking.

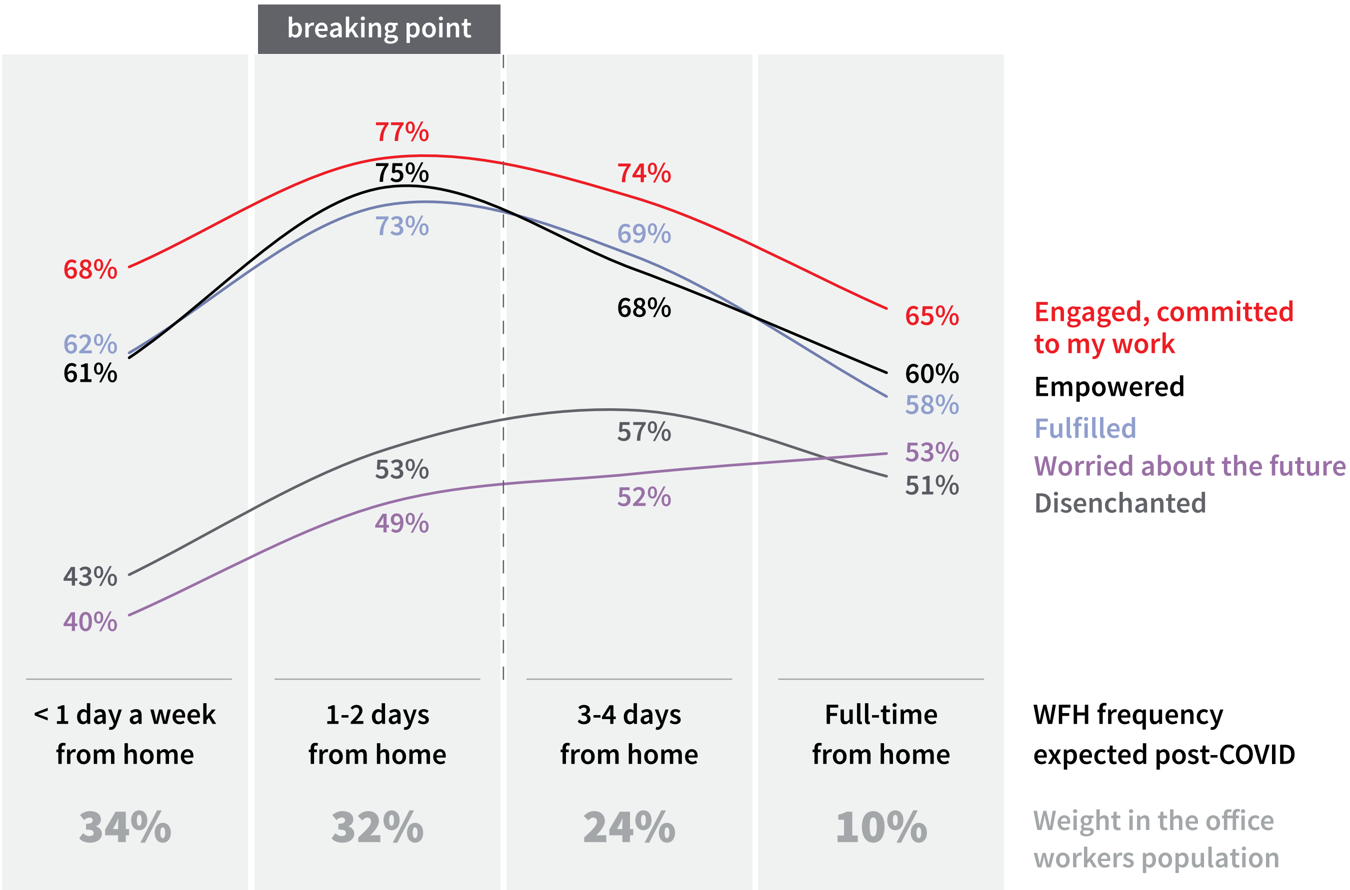
Aside from this new emphasis on health and well-being, the appetite for homeworking is fueled by aspirations for a more balanced and local working life. Workers who consider a good work-life balance and the reduction of the daily commute a priority, want to introduce work-from-home into their routine at least once a week. They also want to be able to define their own workstyle: a flexible schedule, a 4-day working week and even, for some, the freedom to live away from the city.

Employees expectations post-pandemic



However, this quest for a healthier and more balanced life will not be an easy journey. Although the ability to choose one's place of work clearly boosts engagement, empowerment and fulfillment, the frequency of remote working needs to be closely monitored. Working frequently from home is not suited to all workstyles and family backgrounds (access to a desk, possibility to isolate and focus, presence of kids around, etc.).

If not managed carefully, it might negatively impact workforce morale. Our research identifies a breaking point: if more than two days a week are worked from home, the benefits in terms of engagement start to drop off, while anxiety about the future and disenchantment begin to win ground. Offering employees the opportunity to change their center of gravity is a scenario which needs to be cautiously explored.

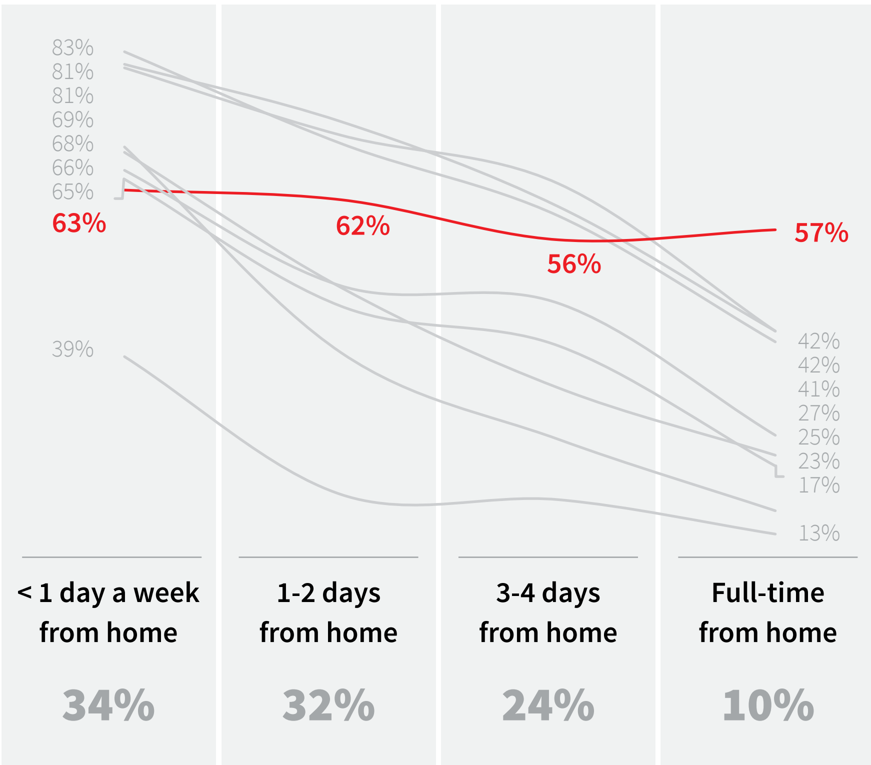


Q. How would you describe your current state of mind ?
Sample: All respondents n= 2033

There is one key benefit which the office excels in delivering: the socialization promise

1 in 2 **employees consider socialization spaces as crucial to their experience in the office in the future.**

The social role of the office is in fact the only one which is acknowledged by all workers, regardless of their aspiration to work from home. In all other aspects, the office tends to be less well rated among employees expecting to work remotely on a regular basis.



% of employees who prefer to carry out this activity in the office

To socialize

To manage or be supported
To collaborate and run meetings
To solve work-related issues
To learn and grow
To create and innovate
To be inspired
To concentrate on a task & deliver individual work

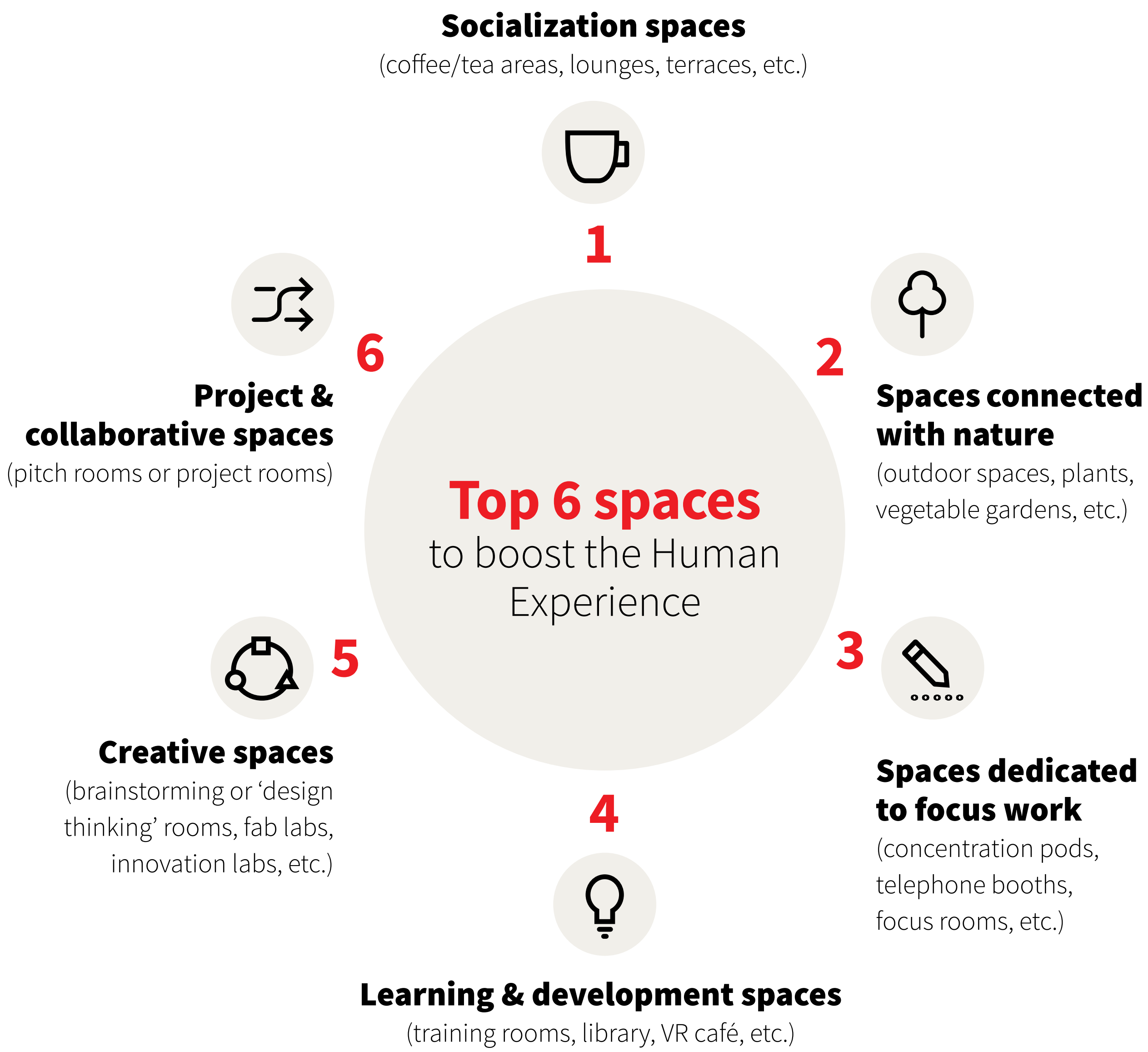
To switch off after a hard task

WFH frequency expected post-COVID

Weight in the office workers population

Q. After your recent homeworking experience, where would you prefer to do the following tasks in the future? At home, in the office or in a third-party place?
Sample: All respondents n= 2033

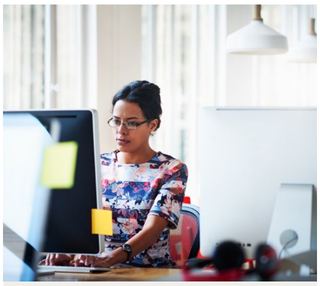
Yet the office cannot be reduced to a social hub only. The workplace of the future will have to find the right balance between collective needs and individual comfort. It will have to offer a biophilic design, together with spaces that respect the need for concentration and privacy. It will also have to provide spaces that support people's growth, creativity and collective intelligence. Variety and choice will be at the heart of an office's value-add, while a core need will be the accommodation of all working expectations and all workstyles. The best workplaces will be the ones created in close consultation with employees.



Q. What kind of spaces would significantly boost your experience in the office?
Sample : All respondents n= 2000

In this new world of work, four hybrid worker profiles are emerging

The post-pandemic office will have to provide highly tailored solutions. Expectations of the workplace are radically different according to employees' appetite for remote-working options. Our research highlights four profiles of worker. Two of them are extreme in their needs: the Traditional office worker who wants to work exclusively in the office, and the Free Spirit who wants to escape from it as often as possible. They are not as different as one might suspect: both are less engaged and fulfilled than the average employee, not expecting a lot from their employer. The two intermediate profiles - the Experience Lover and the Wellness Addict - have extremely high expectations in terms of comfort and human experience.



The Traditional office worker

Full-time
from the office

34%

"Once the pandemic is over, everything can go back to normal."

The Experience Lover

1 to 2 days a week
from home

32%

"I am looking for a vibrant working life."

The Wellness Addict

3 to 4 days a week
from home

24%

"My well-being and my work-life balance are my priorities."

The Free Spirit

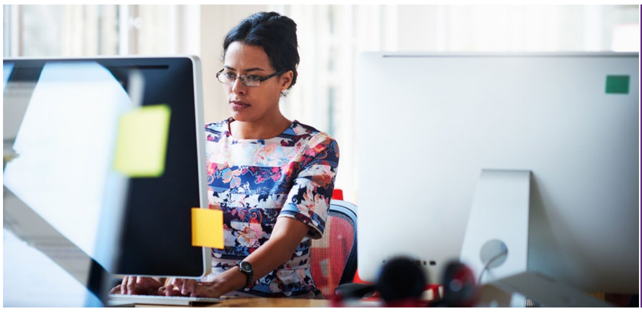
Full-time
from home

10%

"I was already hyper flex in my workstyles - the crisis gives me the opportunity to go a step further."

Traditional office workers

Demand for in-person activities and office-centric work pattern

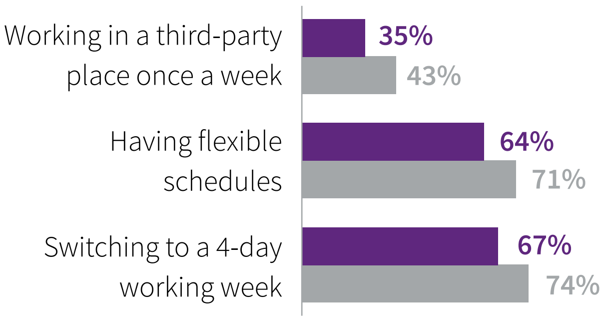


Used to sedentary workstyles

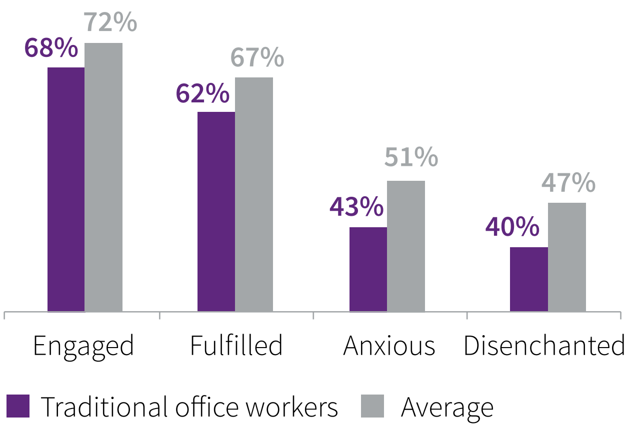
93% **didn't practice WFH before the crisis**
vs. 75% on average

Traditional office workers are not convinced by the massive homeworking experiment. They tend to be reluctant to change and think that remote working is not suited to their job requirements or their working preferences. They are likely to work in industries with a high presenteeism culture and are quite traditional in their workstyle. They did not practice work-from-home before the crisis and the office remains their favorite place of work; they go there to socialize but do not expect much more from their employer. They are quite passive in their attitude to their company and are inclined to be more detached than other worker types, neither really engaged nor fulfilled in their job. Traditional office workers tend to be more numerous among older employees (above 50 years old), big companies and non-managers.

Less attracted by flexibility options



Detached attitude



Few expectations for the office

Just looking for a social hub…

53%
want more socialization spaces in the office
vs. 49% on average

Not expecting a lot from their employer

Fewer respondents in this group, when compared to survey average, are expecting the following from their employers:

well-being services

healthy lifestyle

being pampered

Experience Lovers

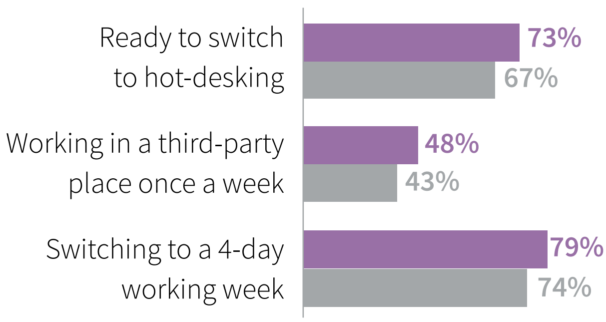
Demand for high flexibility and an office as a destination

Used to mobile workstyles

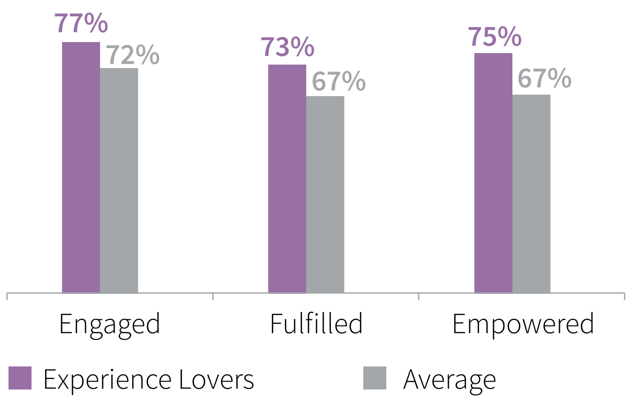
50% **already practiced WFH before the crisis (at least occasionally)**
vs. 38% on average

Experience Lovers consider work-from-home as a great way to add flexibility to their working life and enhance their feeling of engagement, fulfillment and empowerment. They expect a moderate homeworking frequency: 1 or 2 days a week is the perfect balance for them. Their job tends to have management responsibilities and they enjoy going to the office to connect with others with whom they share a common DNA. They value their work community and like being visible and rewarded. They also want to be looked after and consider the office as a key destination. Experience Lovers tend to be more numerous among managers, and to a lesser extent among employees below 50 years old and men.

Attracted by all flexibility options



Strong morale



Growing expectations

A strong connection need

53%
want to be visible and rewarded
vs. 43% on average

Willing to be looked after

41%
want to connect and live memorable moments with their community
vs. 35% on average

47%
want to be offered a healthy lifestyle
vs. 42% on average

41%
would like to be pampered
vs. 36% on average

Wellness Addicts

Demand for flexibility, choice and work-life balance

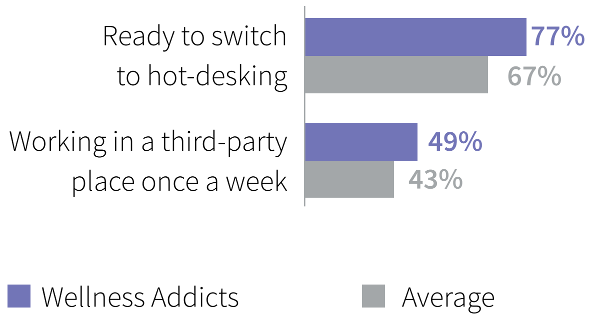
Used to mobile workstyles

53% **already practiced WFH before the crisis (at least occasionally)**
vs. 38% on average

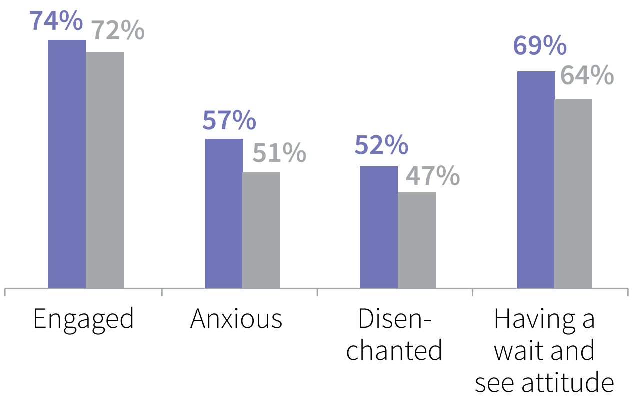
Wellness Addicts put their work-life balance and health first. They were already used to remote-working patterns pre-pandemic and want them to continue, allowing a good equilibrium between their private and professional priorities to be achieved. They want to take care of their health and well-being through reducing their commute. When they do go to the office, they expect an extensive range of services.

They 'consume' the office, picking those working-life facets they cannot find at home: well-being, culture and sports amenities, for instance. As their center of gravity is away from the office, they are likely to be more anxious about the future and to have a wait-and-see attitude; they are somewhat disenchanted. Wellness Addicts tend to be more numerous in the digital and tech industry.

Attracted by flexibility options



Emotional engagement at stake



Workplace as a service

A focus on balance and health
Their new priorities:

54% **work-life balance, commute less and work local**
vs. 46% on average

32% **a company that takes care of their physical and mental health**
vs. 28% on average

26% **a healthy lifestyle**
vs. 22% on average

Expectations of new services

67% **'life-is-easy' services**
vs. 60% on average

56% **cultural services**
vs. 52% on average

76% **well-being services**
vs. 73% on average

67% **sports services**
vs. 62% on average

Free Spirits

Demand for full empowerment and work-from-anywhere working pattern

Big appetite for remote work

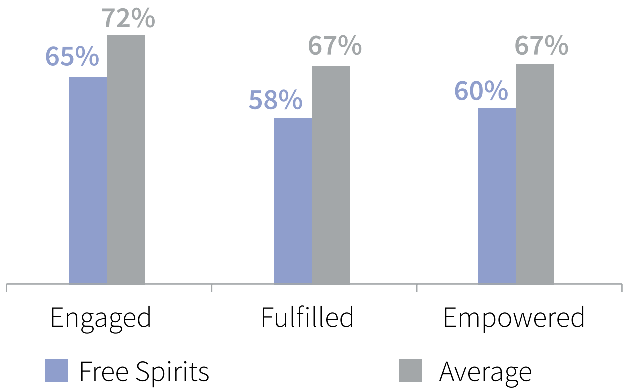
17% **already practiced WFH at least 3 days a week before the crisis**
vs. 10% on average

Free Spirits want full flexibility, and freedom is the only promise they expect from their employer. They are used to working remotely and love it because their family is a priority. They are the perfect candidate to live away from the city as they only go to the office when absolutely necessary. They are also afraid of the virus and risk averse and expect their employer to maintain the new working routines imposed by the pandemic. Free Spirits feel more distant from their company and tend to be less engaged and less fulfilled by their job. They tend to be more numerous in big companies and among non-managers.

The appeal of the countryside

69%
Are attracted by the idea of living away from the city and going to the office only when necessary
vs. 57% on average

More distance from the company



Health and well-being are at the center of their expectations

A strong need for balance

78%
consider work-life balance and the ability to spend more time with family as a priority
vs. 72% on average

67%
aspire to commute less and work locally
vs. 57% on average

A fear of the virus

39%
expect their employer to keep the new routines imposed by the pandemic (enhanced cleaning protocols, physical distancing)
vs. 31% on average

These worker types and the multi-faceted reality in which they belong can no longer be ignored. From now on, employers will have to put their employees at the center of their thinking, collecting relevant and meaningful data on a regular basis in order to establish a very granular policy in terms of HR practices and workplace perks. Flexibility, choice, relevance and unique promise will have to be their new leitmotiv if they want to build a truly worker-centric workplace. This is probably one of the most important learnings from the new ways of working imposed by the global pandemic.

To find out how we can support your global real estate market strategy with research insights and strategic advice, please contact one of the members of the global research team.

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