



# Hybrid Work Decoded

By JLL Global Benchmarking Services and JLL Global Research

GLOBAL | July 2022



# How can offices find new relevance in today's hybrid world of work?

## Understanding how people work in a hybrid office in 2022

There is huge demand from organizations today to more clearly understand how people are working in the new hybrid context. While most employers are now convinced that they must embrace hybrid work and provide real flexibility to their people, many are still unsure about how to best support their employees in the new working landscape. They find it challenging to truly comprehend how work gets done and how the office needs to adjust to produce the right environment for their people to flourish.

Although many people are already working in a hybrid way, the new 'hybrid' office is just emerging, with many organizations exploring new hybrid policies and spaces and learning from them. As a result, employers are now eager to compare where their recently adopted practices stand against new hybrid office benchmarks. In this context, JLL's Global Research team and JLL Global Benchmarking Services (GBS) have combined their strengths to undertake regular surveys of office workers at scale and create post-pandemic benchmarks on the new usages of the office. In parallel to decoding evolving workforce expectations<sup>1</sup>, JLL has aggregated all the data collected for its clients across the world in Q1 2022 to assess the quality and the relevance of the Human Experience (HX) delivered to employees in offices today.

<sup>1</sup> JLL, Workforce Preferences Barometer, June 2022





# Our research in a nutshell:

## Research objectives:

**5** demographic questions

**8** user perception questions measuring importance and satisfaction

**17** user perception questions measuring importance and satisfaction

Decode **how employees are currently dividing their time** between the office, home and third spaces

Identify the **activities that people are doing in the office**

Clarify **how they are using the different spaces and amenities offered to them**

Explore the **opportunities to innovate and shape a more relevant office environment**



**30**

Questions



**5,300**

Participants



**15**

Countries





## **A complete series of research pieces to investigate how employees and employers are adapting to the new hybrid world:**

### **Workforce Preferences Barometer, June 2022**

- 4,000 office workers surveyed in 10 countries
- A deep dive into employees' work and life expectations and the type of support they expect from their employer
- A comparison with our previous surveys conducted in April 2020 and March 2021

### **Hybrid Work Decoded, July 2022**

- 5,300 office workers surveyed in 15 countries
- An analysis of how employees are "consuming" their office space in a hybrid context and how they organize their time between their different places of work

### **Future of Work survey, August 2022**

- 1,100 Corporate Real Estate (CRE) leaders surveyed in 13 countries
- A diagnosis of how CRE leaders have adapted their strategies to tackle the new challenges that have emerged with the pandemic and a focus on their top priorities today and by 2025

# Key findings from our research

As observed in our most recent research<sup>2</sup>, hybrid work is close to equilibrium today: employees expect to work 2.7 days in the office in the future while they are working 2.8 days in the office currently. Employers have listened and responded to employee expectations and their appetite for hybrid work is now well-satisfied.

However, while hybrid work is now perceived as a non-negotiable element of the employer promise, how to support it properly is yet to be defined. As most office environments were designed in the pre-pandemic context, they struggle to efficiently support the new workstyles that have emerged.

## Our research shows that:



**There is a richer purpose to the office of the future than the one we initially anticipated.** Besides supporting collaboration and socialization, the office plays a key role in work-life separation and in establishing necessary healthy working routines.

**Even though employees can choose between different places of work, they struggle to compartmentalize their weekly activities between the office and home –** to correlate their schedule with the place that best supports their particular work needs.

**The post-pandemic office must address the need for focused individual work.** Today, people still spend 50% of their time on focused work in the office. To make the journey to the office worthwhile, both collaborative and focused work need to be enabled.

**Hybrid workers are not properly supported in their new workstyle today.** They are the least satisfied worker group by their Human Experience on-site. Their difficulty in re-establishing a healthy working routine makes the experience of the office more stressful than before. This is an opportunity for the office to reinvent its promise.

<sup>2</sup> JLL, Workforce Preferences Barometer, June 2022



# Insight #1:

**There is a richer purpose to the office of the future than the one we initially anticipated.** Besides supporting collaboration and socialization, the office plays a key role in work-life separation and in establishing necessary healthy working routines.

**Quite naturally, each place of work is appreciated for its distinct attributes:**

- The need for socializing and interactivity is clearly the prime driver for returning to the office. 79% of office workers consider the office as the best place to support downtime and interaction.
- The office is also valued for its ability to provide access to the right set of technologies. 56% of employees find the technology in the office better than anywhere else. Office technology especially plays a key role in Asia Pacific.
- Homeworking, on the other hand, scores highly on work-life balance, wellbeing and focused work.



## However, there is nothing ‘black and white’ in employees’ preferences and behaviours:



**Office workers express mixed feelings around productivity** – the best place to support it all depends on each individual’s preferences and needs and reflects their job function, psychological profile and demographic factors



**28%** of employees feel they can **better focus on a task** in the office

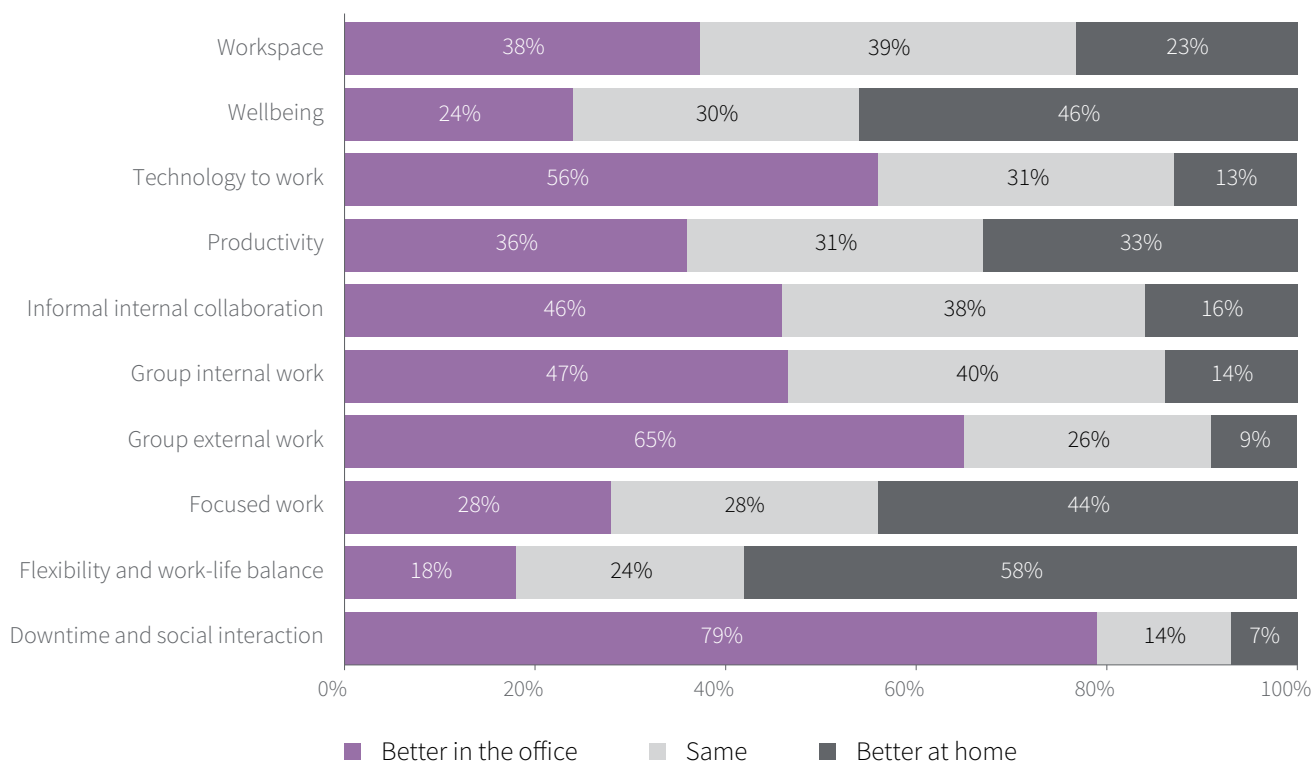


**24%** consider their **wellbeing** is best supported in the office



**35%** also go to the office to more effectively **establish a separation** between their private and professional lives

## Home or the office? Which workplace best supports Human Experience



## Insight #2:

**Even though employees can choose between different places of work, they struggle to compartmentalize their weekly activities between the office and home** – to correlate their schedule with the place that best supports their work needs.

Focused work remains the core of office workers' reality: 55% of total working time during the week is spent on focused work. But, quite strikingly, half of this time is in the office, while the other half is at home, demonstrating the difficulty for office workers to fully rationalize their weekly schedule and dedicate their days in the office to pure collaboration and interaction:

**27%** of working time is spent focusing on a task in the office

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**24%** of working time is spent focusing on a task at home

**Virtual collaboration happens in both places in almost the same proportions:**

**10%** of working time is spent in hybrid meetings in the office

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**11%** of working time involves remote collaboration from home

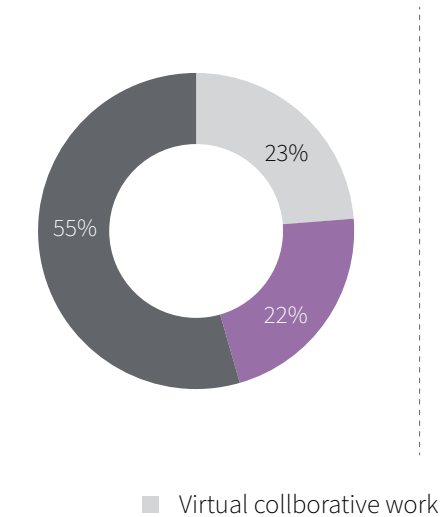




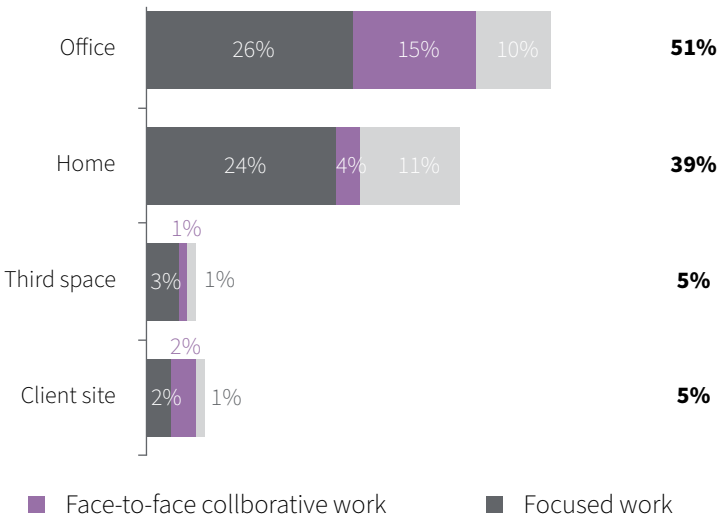
This difficulty in rationalizing working time to make the most of both home and office workplaces highlights a growing need for managerial support and piloting.

The typical working week: activities conducted, and time spent by location

Work activities in a typical week



Total time spent by location



■ Virtual collaborative work   ■ Face-to-face collaborative work   ■ Focused work

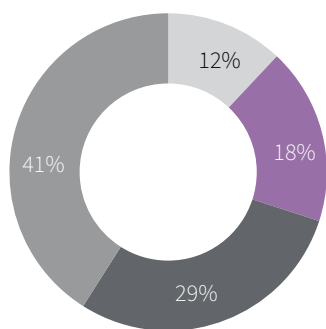




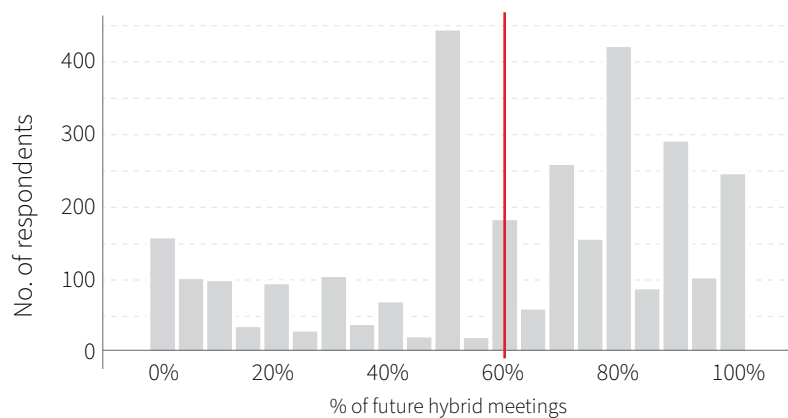
**Another layer of complexity in the new hybrid world is the increasing number of hybrid meetings.** Workers expect that 60% of their meetings will be hybrid in the future. The ability to have an effective meeting that includes actual and virtual participants is currently one of the biggest challenges. The new nature of meetings means that smaller rooms are required in the office along with improved technological provision and experience. Efficient and easy-to-use space-booking systems are becoming essential.

## Meeting space needs and proportion of hybrid meetings

### Required meeting space



### Average: 60% of future meetings will be hybrid meetings



Large meeting room (>10 people)
  Breakout space
  Medium meeting room (5-10 people)
  Small meeting room (2-4 people)

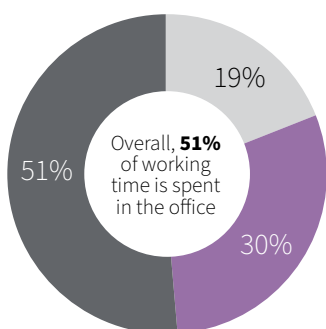
# Insight #3:

**The post-pandemic office must address the need for focused individual work.** Today, people still spend 51% of their time on focused work in the office, with concentrated individual work mostly undertaken at workstations but also in informal open-work points or dedicated focus rooms.

This surprising finding is universal for all geographies and industries. However, although many hybrid offices now tend to focus on collaboration, we believe that enabling focused and private work is also a very important part of boosting performance in the office. To make the journey to the office worthwhile, both collaborative and focused work need to be facilitated.

## Current workstation vs. Expected one

Work activities conducted in the office

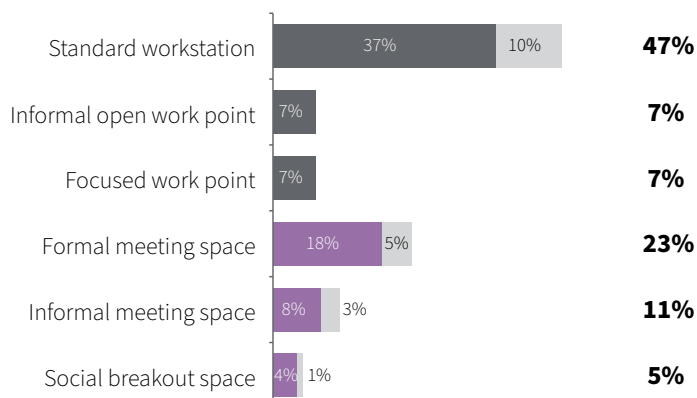


■ Focused work

■ Face-to-face collaborative work

■ Virtual collaborative work

Time spent in the office by space type

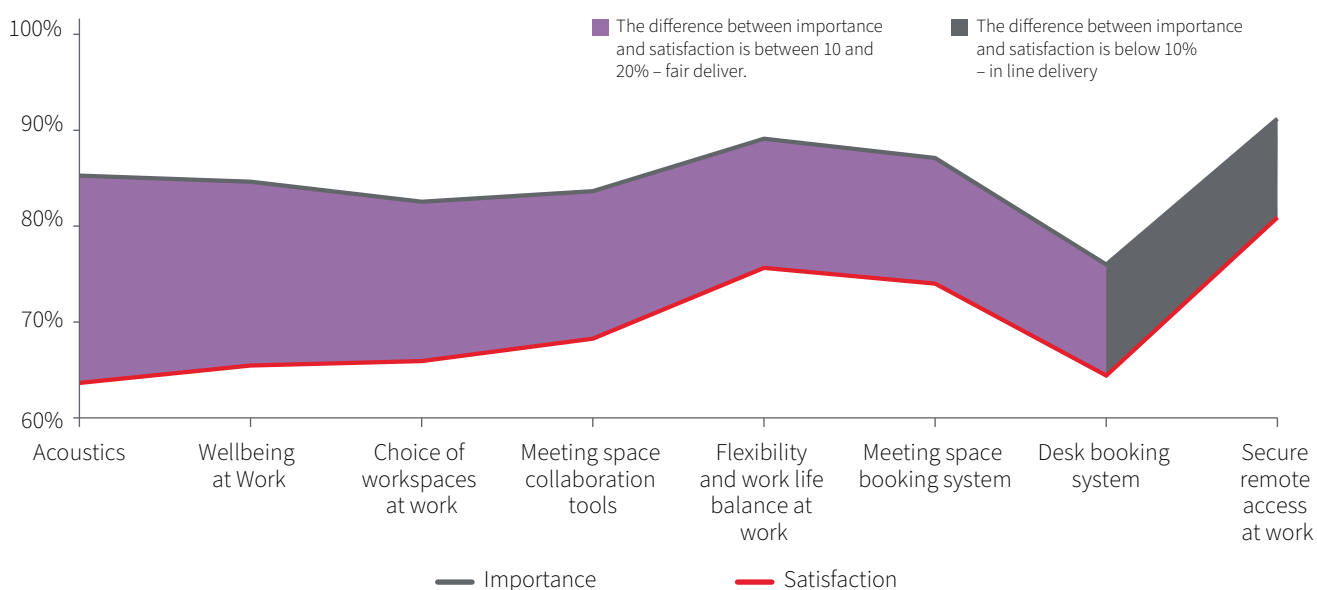




**Have employees become less resilient to noise? As individual work and virtual meetings keep a central place in the office routine, there is now a stronger expectation from employees in terms of workplace acoustics and access to a range of workspace options that suit their individual needs.** These two features are in the top three under-delivered aspects of the office experience today.

Acoustics is a growing issue: people complain about the lack of sound privacy and the difficulty to retreat to a quiet space during their day. They also point to excessive internal noise levels and the absence of workplace guidelines that would make work in open areas and on hot-desking workstations less disturbed and more respectful of individuals' needs in terms of privacy and concentration.

### Human Experience (HX) scores



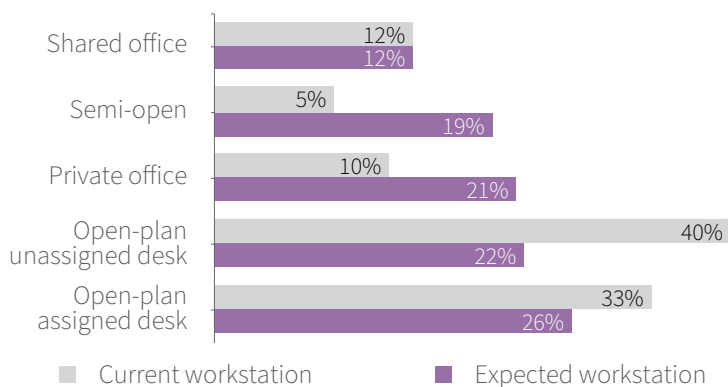


**Open-plan and hot-desking arrangements therefore require change management efforts.** While these types of work settings now tend to be more accepted by hybrid workers – as part of the new ‘win-win’ with the employer – they continue to raise questions about how they should be best used and how they might benefit from increased training, guidance and change management. The needs for privacy, confidentiality and concentration remain pivotal to many types of job and should be addressed more carefully.

#### Current workstation vs. Expected one

Q: Which office desk do you currently have?

Q: Which office desk would you prefer to have?



**Hot-desking acceptance is higher among hybrid workers**

**22%** among remote hybrid

**20%** among office hybrid

**10%** among office residents

**16%** among total population





## Insight #4:

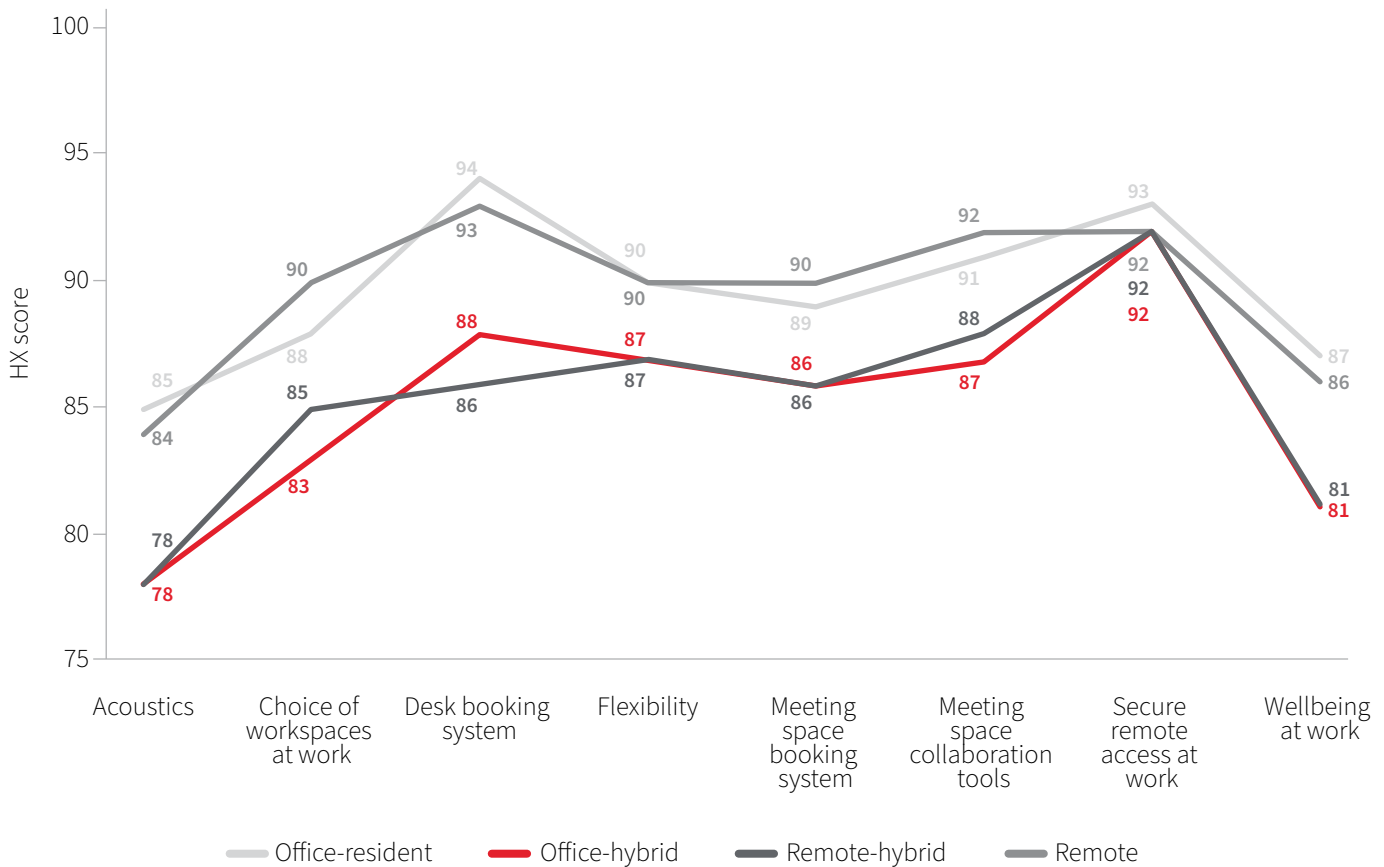
**Hybrid workers are not properly supported in their new workstyle today. They are the least satisfied worker group by their Human Experience on-site.**

This is an opportunity for the office to reinvent its promise in a context where many workers have returned to the same offices that they worked in pre-Covid, even though their working styles have changed considerably. Consequently, we are seeing a significant gap between their expectations and the workplace experience currently delivered to them.

Hybrid workers consistently rate their office experience at lower levels than the rest of the worker population – i.e., those working in a single place, exclusively at home or the office – and yet they still value their office. More than others, they struggle with gaining access to the spaces they need, and they find the office noisy and stressful. Nonetheless, the office remains a safe haven and a place for collaboration and socialization.



## HX scores by workstyle



As a result, hybrid workers have high expectations of their employers. Despite enjoying huge flexibility, they have trouble in creating healthy routines and maintaining close relationships with their colleagues. They require dedicated emotional support, a working environment adapted to their needs, and technology solutions that enable work in the office to be carried out in the best conditions.

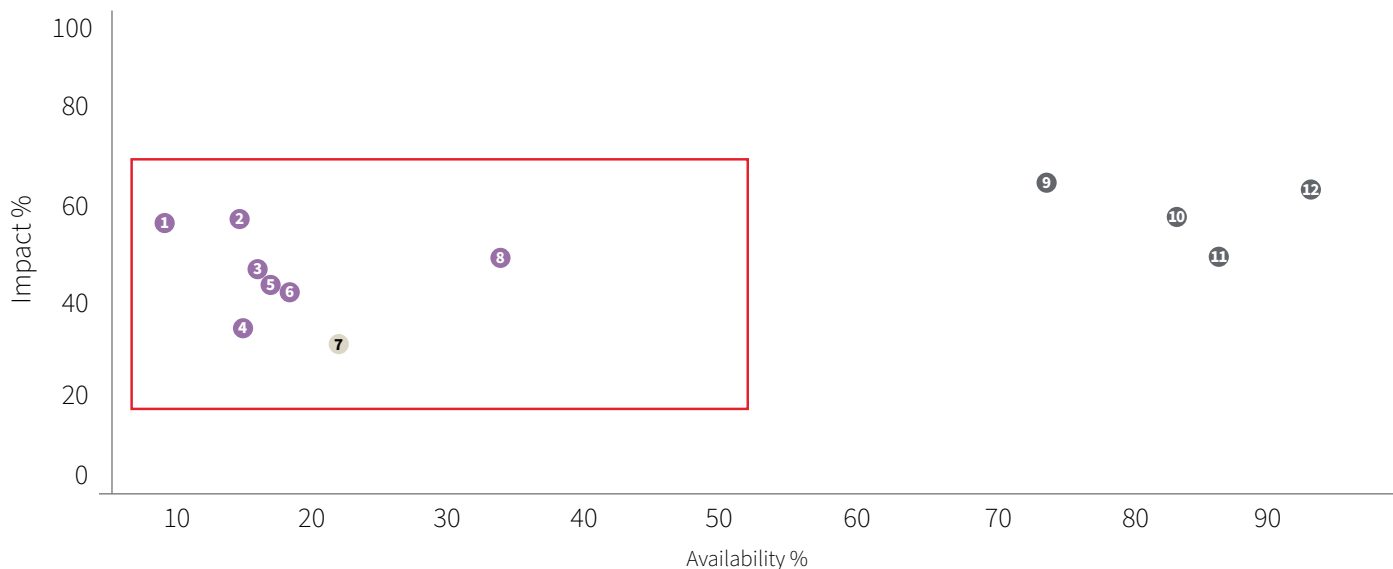
**Wellbeing – whether mental, social or physical – is hard for them to achieve.** More than others, hybrid workers regret the lack of choice in terms of wellness initiatives, the absence of clear and bold wellbeing policy, the lack of employer engagement in favour of a healthier lifestyle, and the low relevance of the available wellbeing initiatives. Not enough has been done by employers over the last two years to address the specific wellbeing needs of hybrid workers and their ‘anytime’ and ‘anywhere’ workstyle.

Hybrid workers are now calling for a reinvented Human Experience on-site, supported by new types of spaces and technologies – most of which are still insufficiently provided by employers:

- Outdoor spaces, creative spaces, coworking spaces and learning spaces stand out as the most impactful but poorly provided spaces.
- Brainstorming and project management tools are also perceived as very impactful but insufficiently provided.

## Space assessment: Availability x Impact (ability to help workers provide the best of themselves)

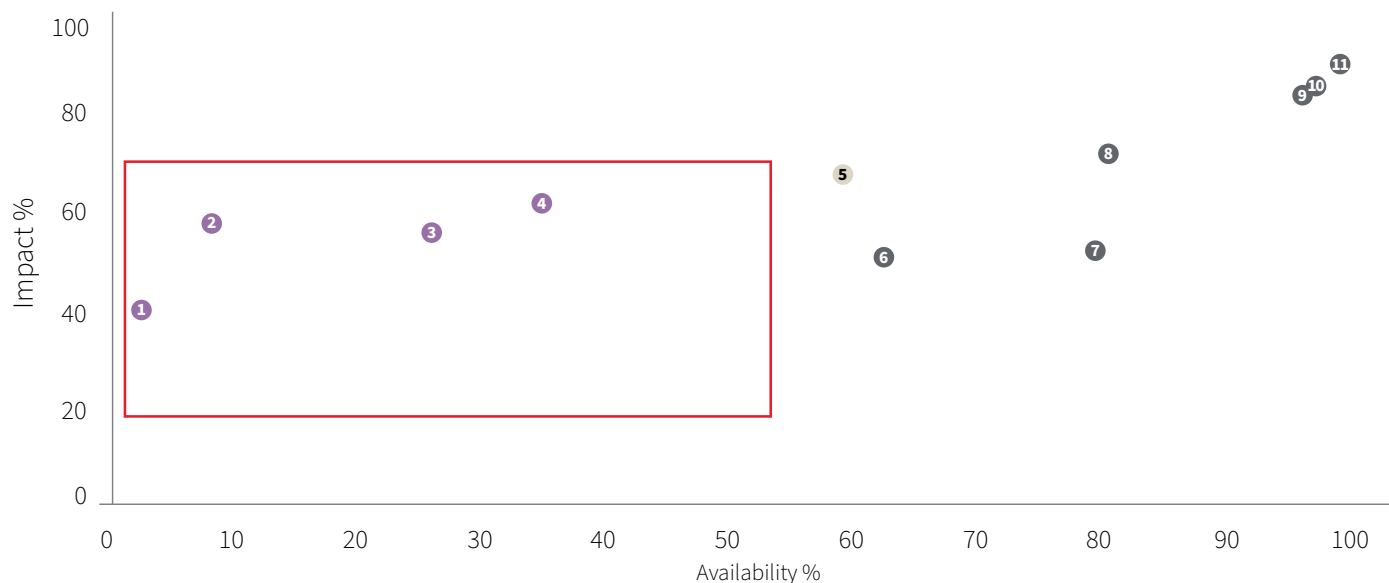
### SPACES



- |   |   |   |
|---|---|---|
| 1. Outdoor spaces /nature inspired spaces | 5. Outdoor spaces/nature inspired areas | 9. Quiet spaces                             |
| 2. Creative spaces                        | 6. Sports room                          | 10. Breakout & collaboration spaces         |
| 3. Co-working spaces                      | 7. Privacy spaces                       | 11. Community spaces                        |
| 4. Wellness spaces                        | 8. Café/restaurant/members Lounge       | 12. Traditional meeting or conference rooms |

## Technology assessment: Availability x Impact (ability to help workers provide the best of themselves)

### TECHNOLOGIES



- |   |                              |                             |
|---|------------------------------|-----------------------------|
| 1. Immersive technology/virtual reality tools | 5. Document management tools | 9. Team collaboration tools |
| 2. Project management tools                   | 6. Social networking tools   | 10. Communication tools     |
| 3. Brainstorming tools                        | 7. Learning & development    | 11. Mobility tools          |
| 4. Business Intelligence/analytics tools      | 8. Remote working tools      |                             |

# Conclusion and recommendations

Employers are faced with multiple challenges in the new hybrid landscape and a list of priorities that need to be addressed to ensure that their employees' preferences are met wherever they work. The office clearly has a central role to play in supporting both focused work and collaborative tasks. Employers are currently not providing adequate and relevant support to employees to embrace the diversity of their workstyles, and this is having an impact on the wellbeing, quality of collaboration and performance of employees.

The office remains central to the ecosystem of work. We know today that hybrid has a durable presence, but it has to be organised around the needs and preferences of employees. Spaces, technologies, support services, acoustics and working patterns all play a part in creating the right working environment.

**For further insight on employees' preferences, check out our JLL Workforce Preferences Barometer, released in June 2022.**

**How should employers orchestrate the return to the office and support hybrid work in the long term?**

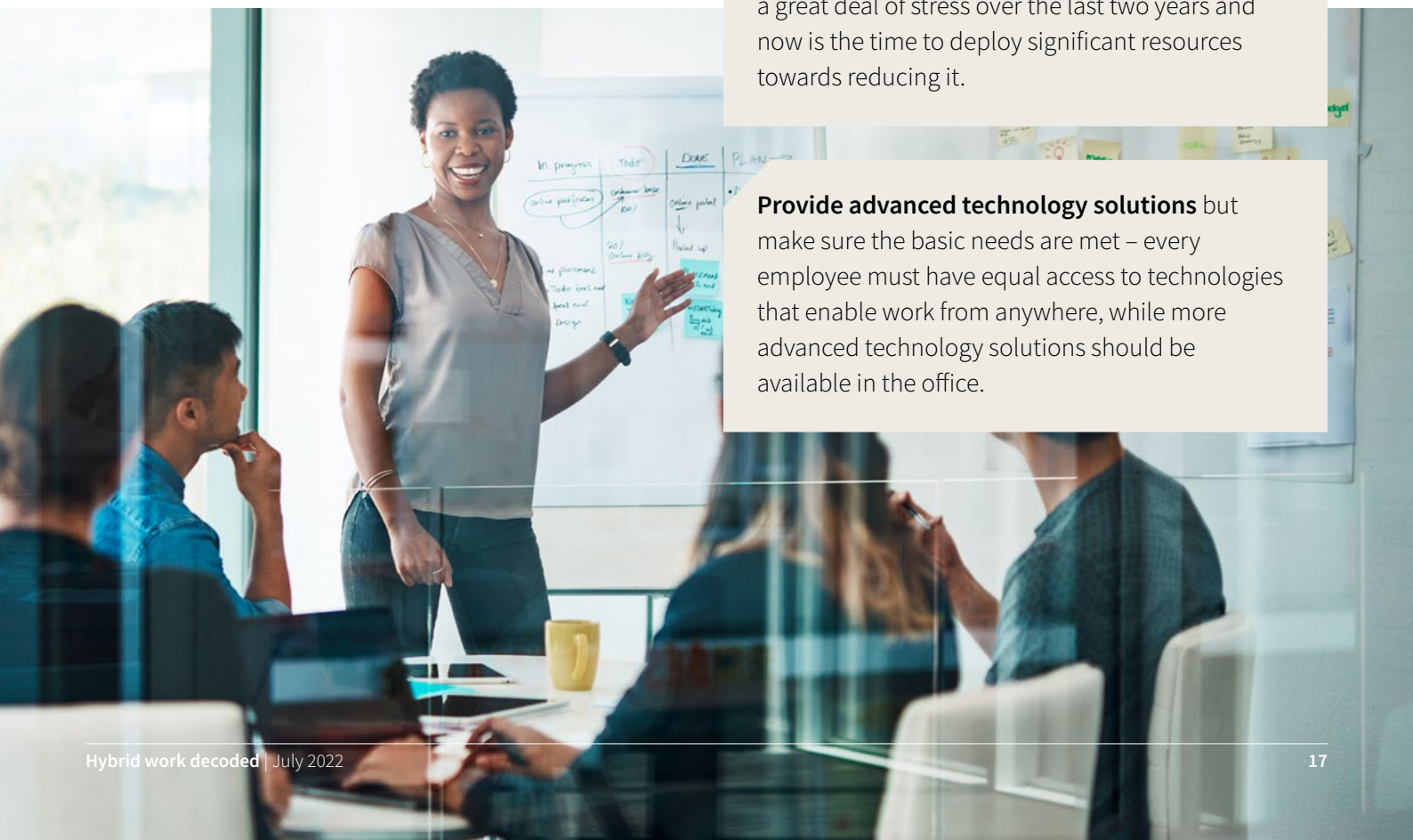
## **Understand your employees' expectations**

and adjust your approach continuously – explore their diversity, closely monitor them through regular – if not real-time - data collection and remain attentive to emerging trends.

**Fine-tune your office environment** to provide a broad range of spaces and flexible services – employees need to be confident that they will have access to what they need when they return to the office.

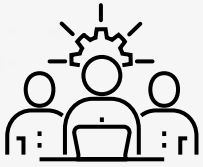
**Put the emphasis on wellbeing** and map out support services around mental, social and physical health – employees have accumulated a great deal of stress over the last two years and now is the time to deploy significant resources towards reducing it.

**Provide advanced technology solutions** but make sure the basic needs are met – every employee must have equal access to technologies that enable work from anywhere, while more advanced technology solutions should be available in the office.





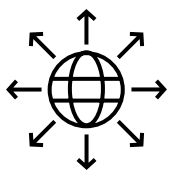
# Future research and benchmarks



These latest insights are extracts from an ongoing program of regular, large-scale surveys on workforce expectations and human experiences that we will continue to share with clients. Our ambition is to create benchmarks that enable organizations to see where they stand in the newly evolving usages of offices and other workplaces.

**Our Global Research team** delivers intelligence, analysis and insight through market leading reports and services that illuminate today's commercial real estate dynamics and identify tomorrow's challenges and opportunities. Our more than 500 global research professionals track and analyse economic and property trends and forecast future conditions in over 60 countries, producing unrivalled local and global perspectives. Our research and expertise, fuelled by real-time information and innovative thinking around the world, creates a competitive advantage for our clients and drives successful strategies and optimal real estate decisions.

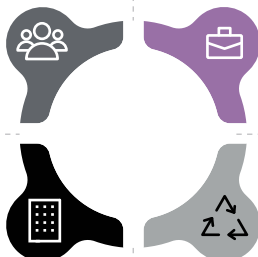




**Our Global Benchmarking Services (GBS)** team are leading experts in real estate performance comparisons, providing insights from client data and market comparisons that enable our clients to optimize portfolios, realize cost savings, drive efficiencies and make critical real estate decisions with speed and confidence. We have developed a unique market comparison expertise, combining 25 years of experience, a rigorous global benchmarking methodology and millions of datapoints from across the globe. Using client internal data and our expertise and market benchmarks, we can benchmark real estate performance by geography and industry and across a range of critical metrics (space, cost, density, sustainability), unlocking real estate insights and empowering our clients to make informed portfolio decisions backed by big data. And with our Human Experience tool, we can map the employee experience so that our clients can learn what their employees think about their working environment and what spaces and technologies are important for them as they reimagine their workplace for the future of work.

### People

With 70,000+ respondents and 52 different factors encapsulating remote working, productivity, collaboration, wellbeing and much more, our Human Experience survey helps you to learn and track what your employees are thinking. Fully customizable to client requirements while maintaining the integrity of the benchmarks, our solution helps you to future plan effectively by understanding the impact of remote working and human experience on your workforce and what they need from the office of the future.



### Portfolio

More and more organizations are looking to integrate flexibility and agility into their portfolios in the wake of uncertainty, while realizing cost savings. We provide clear comparisons and insights into how you are using your space with valuable cost metrics, such as cost per person, cost per desk and cost per square meter, benchmarked against the market.

### Building operations

Analyzing your facilities management operation and providing clear comparisons with your peers, we'll identify any inefficiencies in your operation - at an individual building or portfolio level or at a service line level - helping you to reduce costs and streamline your FM performance.

### Sustainability

There has never been more pressure from employees, business leaders, investors and governments to prioritize sustainability. We provide critical insights into environmental performance through consumption analysis and benchmarking of energy, waste and water usage.



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### About JLL Work Dynamics

JLL Work Dynamics partners with leading organizations across industry sectors, creating environments that achieve a more human-centric, resilient and responsible approach to shaping a better world of work. With more than 45,000 local and global specialists, the team enables clients to enhance the performance of their portfolios and people to realize their ambitions of a more sustainable built environment. Through technology enabled solutions, JLL Work Dynamics creates safe and inspiring spaces around the world for people to collaborate, innovate and drive meaningful change anywhere that work is performed. JLL Work Dynamics manages over 1.6 billion square feet of real estate and has averted more than 112,700 metric tons of CO<sub>2</sub>e by advising clients on renewable energy projects. For more information visit [jll.com/FutureofWork](https://jll.com/FutureofWork)

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