



June 2022

Global Research

Workforce Preferences Barometer

Exploring employees' new work expectations and ways employers can best support their workers in the new hybrid world

Foreword

The latest edition of our JLL Workforce Preferences Barometer reveals that the hybrid working model has become the most popular way of working today among office workers. It has now been adopted by the majority of employees. However, hybrid is not an exclusive or universal way forward and there are many aspects to this new way of working - involving reward, risk and uncertainty - that need careful consideration. While hybrid's new 'most popular' status represents a landmark in the history of work, it has aroused mixed feelings among the workforce and raised some inescapable questions:

- Will hybrid create a two-speed society?
Our research finds that while a third of the workforce is strongly enthusiastic about the changes taking place in the workplace today, another third feels left behind.
- Will hybrid become a 'golden cage' for its most engaged adopters? Strikingly, our analysis of the 'Hyper hybrid' workers (working in three different places each week) highlights that while this workstyle has many empowerment opportunities, it also requires a 'perpetual change' mindset to constantly adapt to different work environments, work rhythms, coworkers, etc. As a result, 'Hyper hybrid' workers are the most at risk in terms of mental health.

In this context, the employer has a unique opportunity to show that they are really listening to the needs and life aspirations of their workforce. Enabling hybrid work is one way, and a powerful way, to demonstrate to their people that they care. But this ambition requires more than just offering an employee a number of remote-working days. It should set employers off on a new mission to shape a more equitable world of work, that supports all workstyles - both remotely and on-site - and ensures that no one feels excluded.

Importantly, the office still has a critical, but noticeably adjusted, role to play in this new hybrid work reality. It must become an inviting and inclusive destination where each member of the work community can reliably seek mental wellbeing support, peer recognition and a sense of belonging. It must also become the anchor of an organization, one that enables shared achievements while allowing individual fulfillment and multiple workstyles to flourish. Hybrid has created a pivotal moment for employers to redefine the way we work and socialize; however, its sustained success as a workstyle will necessitate a reconsideration of the role of the workplace, across all its diversity, and of how it can shape and encourage new managerial cultures and community dynamics.

Flore Pradère

Work Dynamics Research Director, Global



Key insights from our research

1 Hybrid work has reached an 'optimal point'



60%

of office workers want to work in a hybrid style today and 55% are doing so already. These figures were respectively 63% and 50% a year ago.

2 The employer is now expected to support hybrid work in many different ways



6 in 10

employees expect to be supported with technology and financial assistance for expenses linked to remote work. Less than 4 in 10 currently benefit from these types of initiatives.

3 Enabling hybrid work shows your people that you are a flexible and empathetic employer



This workstyle is especially appreciated by Managers (75%), Gen Z (73%), Gen Y (69%) and Caregivers (66%).

4 The long-term success of hybrid work will rely on a holistic approach to performance and value creation



While the sense of being more productive at home for heads-down work keeps growing, 25% of the workforce feel isolated today and unable to nurture close relationships with their colleagues.

5 Companies have an opportunity to reinvent their EVP (Employee Value Proposition)



Only 48%

of the workforce believe that their company is a great place to work today.

6 The responsible employer of the future will focus on taking care of the health of their people



59%

of employees expect to work in a company that supports their health and wellbeing. This is now ranked as the second priority at work, after quality of life and before salary.

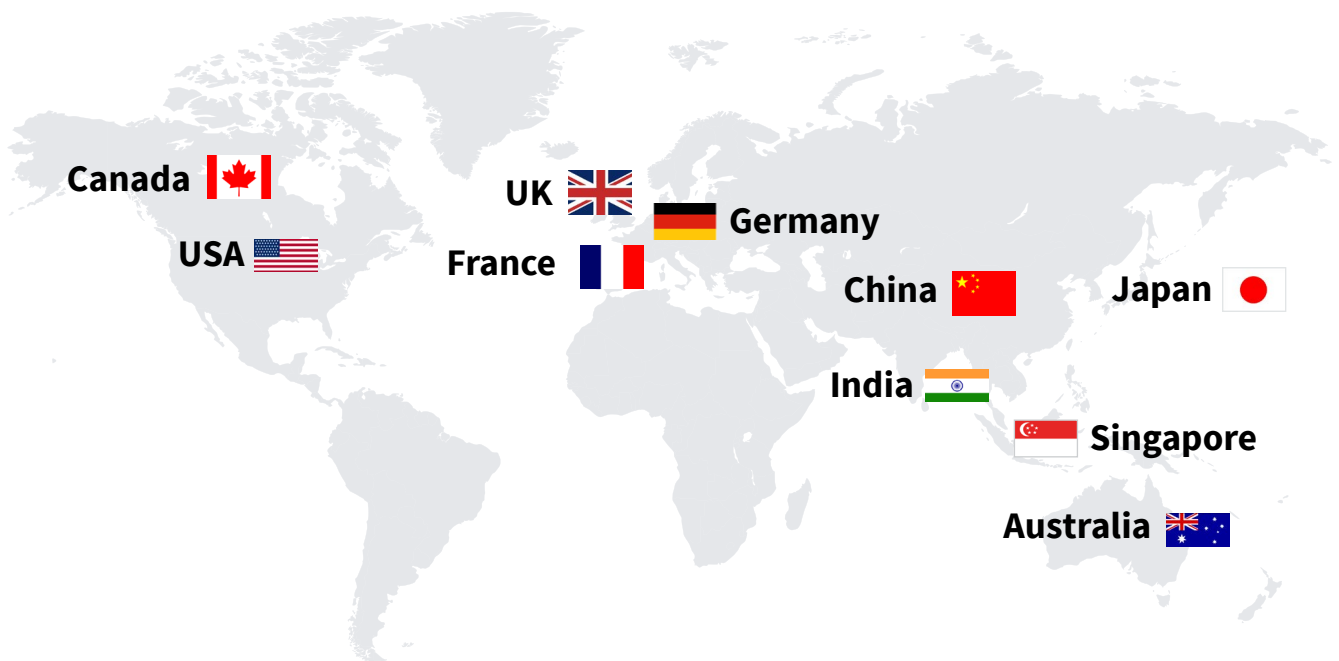
Methodology and research scope

A global barometer to understand how office workers feel about hybrid work and how it impacts their priorities at work, their performance and their wellbeing.

4,015
office workers

10
countries

300
respondents per country*



The latest readings from our Workforce Preferences Barometer are based on responses from 4,015 office workers across the world, providing a valuable comparison with the previous surveys we conducted in April and October 2020, and in March 2021.

April 2020

Human Performance Survey

October 2020

Human Experience Survey

March 2021

Workforce Preferences Barometer

April 2022

Workforce Preferences Barometer

Respondents' Profile

- 18+ years old
- Working in companies with over 100 employees
- 30% working in SMEs - 70% working in big corporates
- Quotas on age, managerial responsibilities, company size and industry

*Except in the U.S. with 1,000 interviews and Canada with 500 interviews



Insight #1

An 'optimal point' has been reached

Hybrid work has become the most popular way of working today: it has been adopted by a majority of office workers.

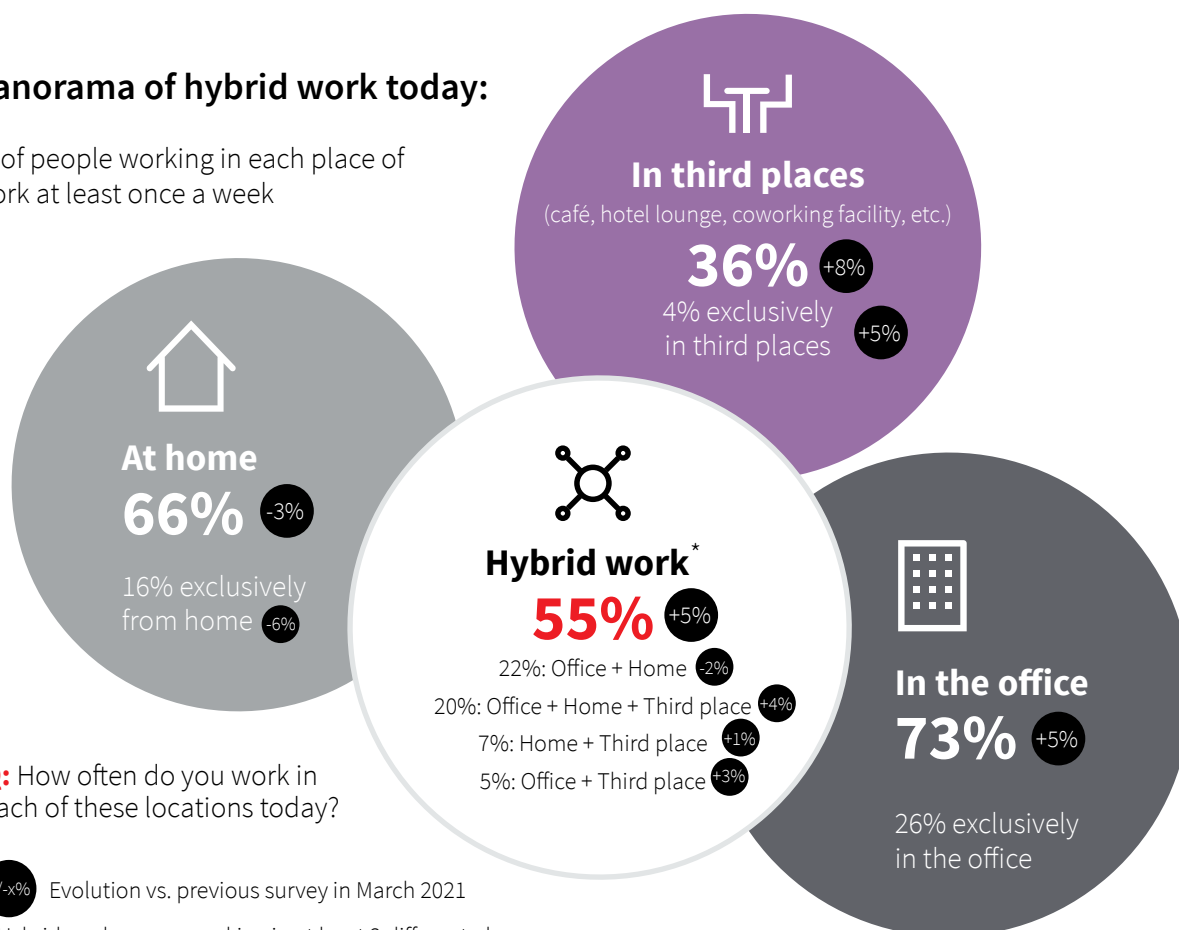
Hybrid work keeps growing: 55% of employees alternate between different places of work every week (+5% vs. March 2021).

Return to the office is confirmed: 73% of office workers are going to the office at least once a week (+5% vs. March 2021).

Hybrid work is becoming more complex as a growing proportion of employees not only work from their home but also from third places like coworking facilities: 36% of employees work in third places on a weekly basis today (+8% vs. March 2021). 33% are attracted by the possibility of gaining access to coworking facilities or satellite offices close to their home.

Panorama of hybrid work today:

% of people working in each place of work at least once a week



*Hybrid work means working in at least 2 different places

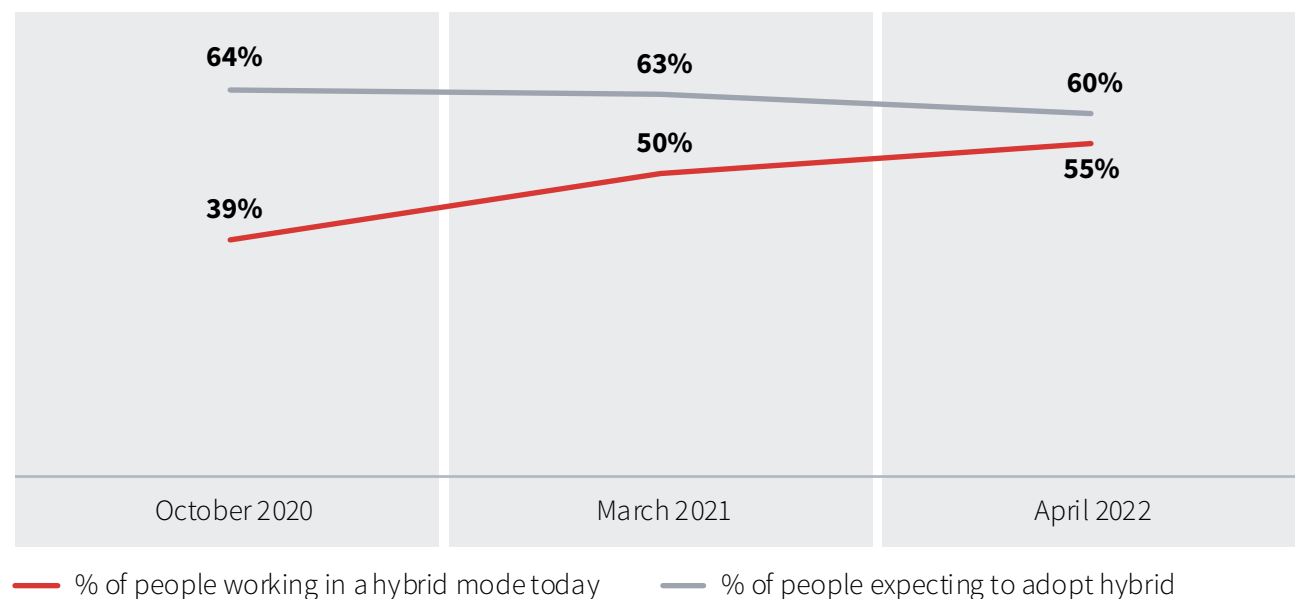
Source: JLL Workforce Preferences Barometer, 2022

Almost all office workers that aspire to work in a hybrid mode are doing so today

With the ability to return to the office, the appetite for hybrid work has slightly reduced (from 63% a year ago to 60% today), revealing that hybrid work is probably not ideal for some groups, either because of their job requirements (the appetite for hybrid work is weaker in industries like Pharma or Education) or because of the managerial culture (appetite is also weaker among senior employees and non-managers).

In parallel, however, hybrid work practice has spread quickly and is getting to a point where the people that aspire to adopt this workstyle have made it a new routine. Only 5% of (“frustrated”) office workers do not currently have the opportunity to make hybrid work a reality.

Hybrid Work: current practice vs. expectations



Q: How many days a week do you work remotely today and how many days do you expect to be doing so in 12 months' time?

Source: JLL Workforce Preferences Barometer, 2022

In terms of remote-work frequency, expectations are fully aligned with current practice

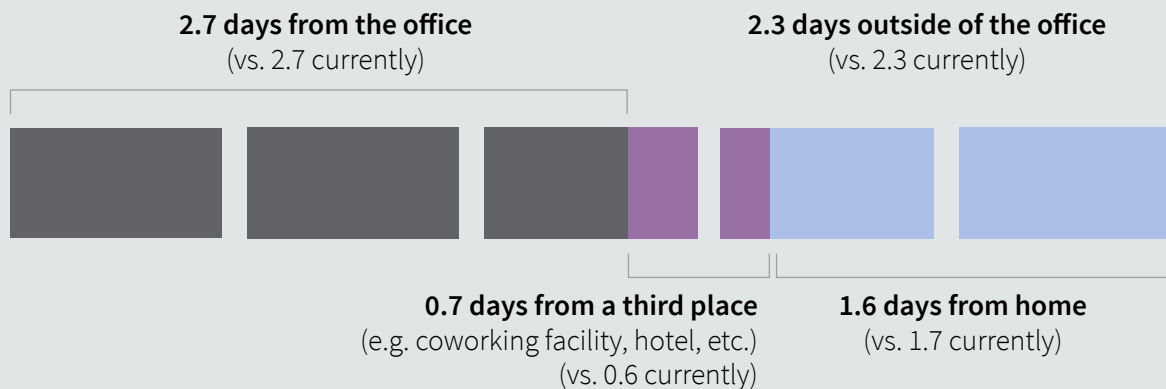
2.7 days from the office

In a typical working week, employees expect to work slightly more than half of the time in the office (2.7 days)

2.3 days remote

They expect to spend the other half (2.3 days) outside of the office, mainly at home but also half a day (0.7 day) in third places like coworking facilities

The expected average working week in 12 months' time:



Source: JLL Workforce Preferences Barometer, 2022

If hybrid work is perceived as a non-negotiable element of work for the future, the office is also recognized as pivotal to the new hybrid routine.

69%

of office workers consider that **hybrid work will be fundamental to retain** the workforce in the future

66%

believe that **employers will have to support hybrid work** in the future

60%

also think that **the office will remain central to their working life**

Insight #2



The employer is now expected to support hybrid work in many different ways

If hybrid work is here to stay, it questions the role of the employer in facilitating this new workstyle. As it embraces hybrid, the workforce has new expectations not just for remote working but also for in-office support, which is stretching further the traditional scope of responsibility of the employer.

The biggest gaps in terms of what is expected and what is received in remote-work support lie in financial assistance, tech equipment and office equipment. Outside of these universal expectations, managers have more sophisticated demands than general office workers; they expect solutions to reduce repetitive tasks (40% vs. 33% of the general population) and would like more than others to have access to local services (27% vs. 22%) and meal delivery (18% vs. 14%).

Hybrid-work support: current practice vs. expectations

Already provided by their employer		Expected from their employer		Gap vs. Support provided today
38%	Technological equipment	60%		22%
23%	Financial assistance for expenses linked to remote work	58%		35%
22%	Advice on how to set up an ergonomic workstation at home	33%		11%
20%	Office furniture	42%		22%
18%	Automation-driven solutions to reduce repetitive tasks and free up time for more focused / creative work	33%		15%
17%	A financial bonus	38%	40% among Managers	21%
12%	Access to local services – gym, nursery, concierge, etc.	22%	27% among Managers	10%
9%	Meal delivery	14%	18% among Managers	5%

Q: What kind of support does your employer provide to remote workers today?

Q: What kind of support do you expect your employer to provide to remote workers?

Technological support expectations are particularly high:



Providing the ‘basic package’ is where employers must focus their efforts and remote-working technologies have become a must-have, expected by 6 in 10 employees.

Hybrid work also raises renewed collaboration challenges, with the same proportion of the workforce (6 in 10) displaying an appetite for new in-office collaboration technologies.

Managers but also Gen Y are again the most demanding groups: they tend to be more attracted by employee experience apps, health-tech solutions and immersive technologies.

Technological support: current practice vs. expectations

Already provided by their employer		Expected from their employer	Gap vs. Support provided today
43%	The basic package: a good laptop, reliable WiFi, etc.	71%	28%
41%	Remote-working technology	63%	22%
38%	In-office collaboration technology	61%	23%
25%	Employee experience apps to access office services or facilities	44%	19%
21%	Health-tech wellbeing solutions	38%	17%
15%	Immersive technologies like virtual reality	23%	8%

Q: What type of technology support does your employer already provide?

Q: What type of technology support do you expect in your job today?

Insight #3



Enabling hybrid work shows your people that you are a flexible and empathetic employer

Hybrid work has proven to be a desirable workstyle and a tool of empowerment. It has created an opportunity for the employer to support each individual with their own unique background and aspirations.

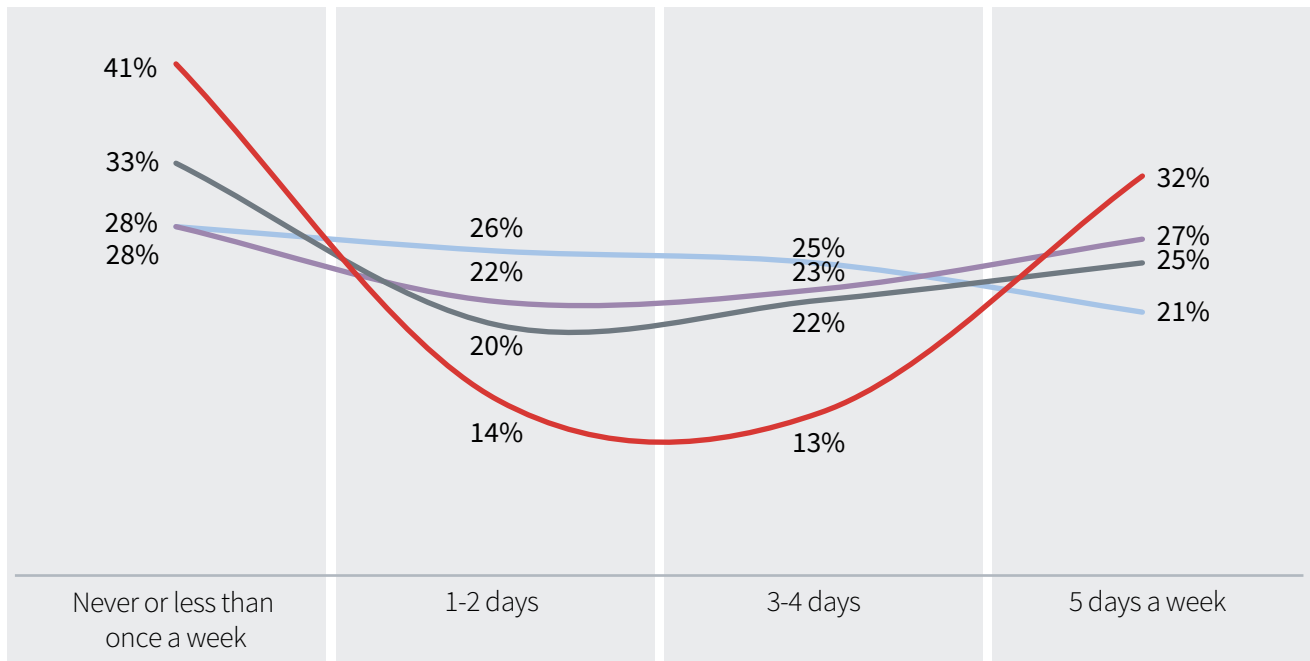
Notably, hybrid work is providing an improved sense of commitment and autonomy. 45% of the workforce feel very engaged in their job today and 39% feel highly empowered. These figures were respectively 39% and 31% a year ago.

The biggest advocates of hybrid work are Managers (75%), Gen Z (73%), Gen Y (67%) and Caregivers (66%). Among this last group, working parents with young children and people taking care of a disabled family member are big adopters of hybrid work (respectively 69% and 81%), revealing the ability of this workstyle to help them juggle their professional and personal imperatives.



However, hybrid work is not a universal way forward as it also challenges managerial culture, with both Non-Managers and Boomers groups having a weaker appetite for this workstyle. This highlights the difficulty for some to adapt to this new way of working. In fact, the most senior cohorts are split between remote-work fans (the 32% that work exclusively from home) and detractors (the 41% working exclusively from the office). This is something to consider given the influence of leaders on the change management of an organization. If 41% of these senior employees do not practice remote work themselves, they might also be reluctant to embark on and support their teams in this new workstyle.

Remote-work adoption by age:



— 18-24 — 25-34 — 35-49 — 50+

Q: How many days a week do you work remotely today?

Source: JLL Workforce Preferences Barometer, 2022





Insight #4

The long-term success of hybrid work will rely on a holistic approach to performance and value creation

Our research highlights that human performance goes beyond the ability to deliver heads-down work and should also involve social connection, synergies, and alignment on a common vision.

Strikingly, the feeling of being more productive at home for heads-down work keeps growing among remote workers. As they have become used to their new homeworking routine, 47% believe they are more productive at home than in the office today when it comes to delivering individual focused work. This figure was 37% a year ago.

While this evolution can be perceived as good news for corporate performance, it also poses a sustained risk in terms of the ability to create social value and unite the workforce around a shared purpose and vision:

25% of employees feel isolated today and unable to keep close relationships with their colleagues

50% still miss social interactions when they work remotely

44% miss the common understanding and the bonding that goes with collective face-to-face work

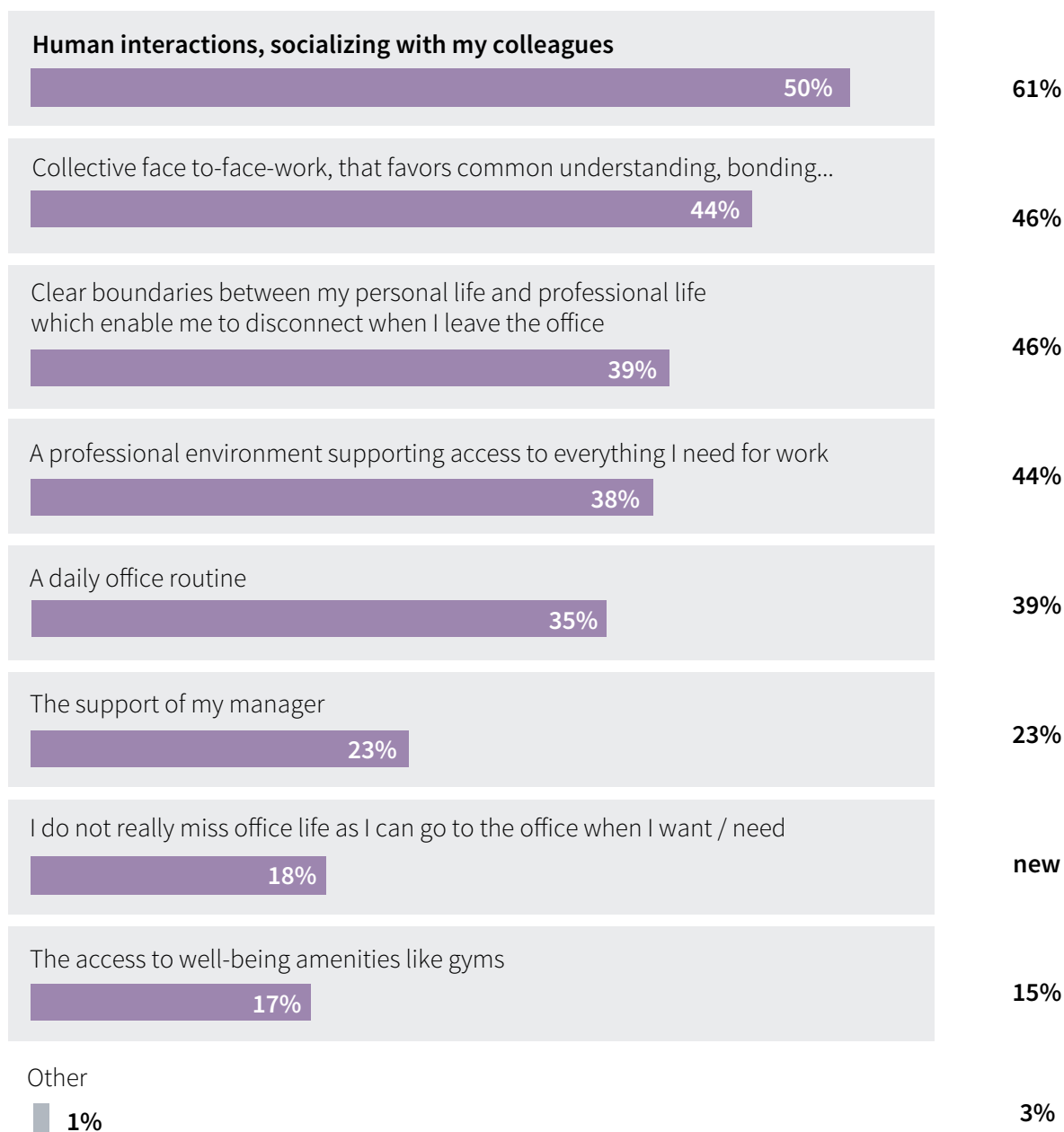


Face-to-face collaboration is the aspect of office life which is missed by the same proportion of respondents as a year ago, despite people being able to return to the office more often. This need should be at the heart of a company's approach to performance in the future. This is to ensure not only workforce alignment, but also the serendipity and synergies required to fuel the innovation culture of an organization – one of the biggest concerns of employers today after talent retention.

In this context, the long-term success of hybrid work will require a smart piloting of remote and office work to ensure that team members can synchronize at some point in their new hybrid journeys. It will also depend on better technology support and strong managerial coordination.

Aspects of office life missed the most when working remotely:

Comparison with
March 2021



Q: What aspects of office life do you miss the most when working remotely today?

Source: JLL Workforce Preferences Barometer, 2022

Insight #5



Companies have an opportunity to reinvent their EVP (Employee Value Proposition)

While the transformation of work has created enthusiasm among the workforce, it has also threatened the strength and value of the employee relationship with their employer.

While some people feel left behind, others question whether the efforts they have put into their job in the past months have been worth it. As a result, only 1 in 2 employees is convinced that their company remains a great place to work today.

1 in 3

employees feels enthusiastic about all changes taking place in the world of work at the moment. The same proportion has the opposite feeling

1 in 3

feels disenchanted

1 in 4

has reconsidered the part that work plays in their life

1 in 4

is envisaging leaving their employer in the coming year

In a dramatically changing world of work where employees are reassessing their ways of working and living, workforce priorities are shifting. Quality of life is at the center of employees' concerns and confirmed as their first priority today. Salary is now ranked third, while health support has increasing importance. Mental health and wellbeing have become more important than ever. In the future, providing access to gym facilities will no longer be sufficient. Employers will have to take care of their workforce's minds by managing their stress levels and shaping a safer place of work for them. This has become even more relevant in the new hybrid world which, while creating a lot of empowerment opportunities for hybrid adopters, also requires them to have a 'perpetual change' mindset to constantly adapt to different work environments, work rhythms, coworkers, etc.

71%

of the workforce want to work in places that promote a healthy lifestyle, safety and wellbeing

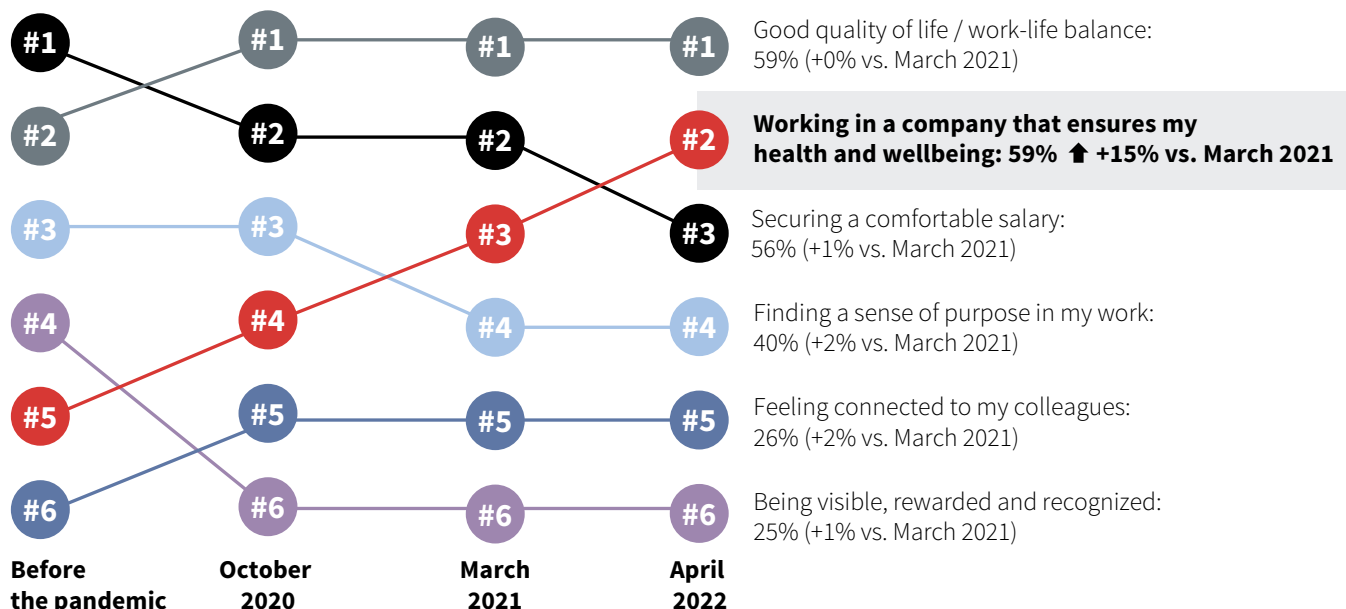
59%

see health and wellbeing as a priority, as opposed to 44% a year ago

41%

expect mental wellbeing support, while 33% expect physical wellbeing support

Top work priorities:



Q: What are your priorities regarding your work today?

Source: JLL Workforce Preferences Barometer, 2022

As a result, quality of life has become the number 1 reason that could encourage people to leave their current employer. 3 in 4 employees would reconsider their involvement with their company because they want to have greater flexibility and more quality time with their family or for personal pursuits.

The search for a better package remains a strong change driver but it goes beyond a financial reward for 1 in 3 employees. The focus groups we conducted with employees in the past months have revealed that the workforce is challenging the employment contract that was traditionally agreed with their employers. Employees now rate highly the flexibility that is being offered to them, the ability to learn and improve their employability, and the alignment of their company with their own values.

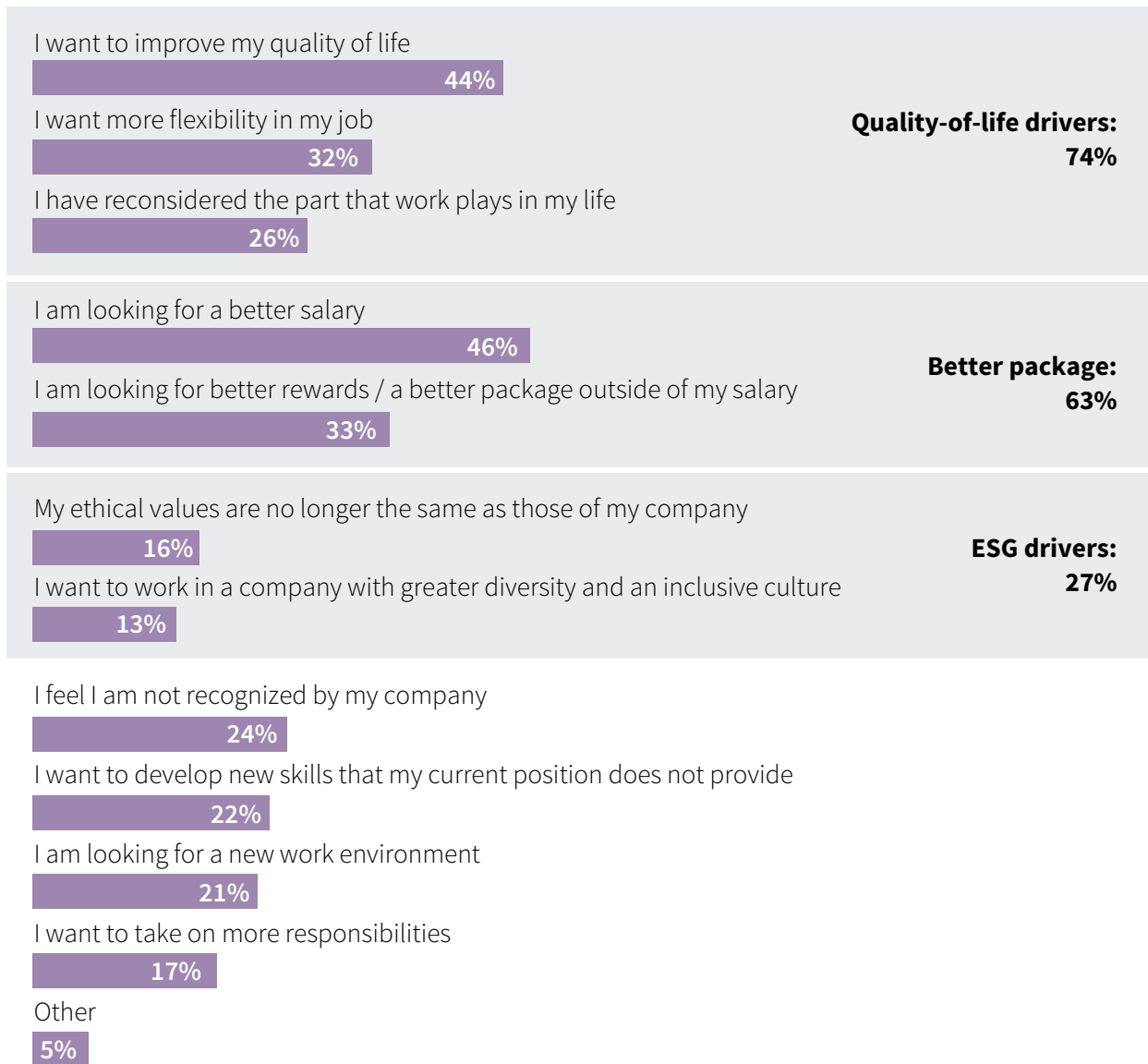
Hence, the ability to have a positive impact on society through the choice of the employer is growing in importance:

44% of the workforce expect to work in **places that are respectful of Earth's resources** and act for the climate. This figure was 38% in March 2021

38% would like to work in an **office that is designed sustainably**

27% could leave their employer because they do not share the values promoted by their company

Reasons that would make people leave their employer:



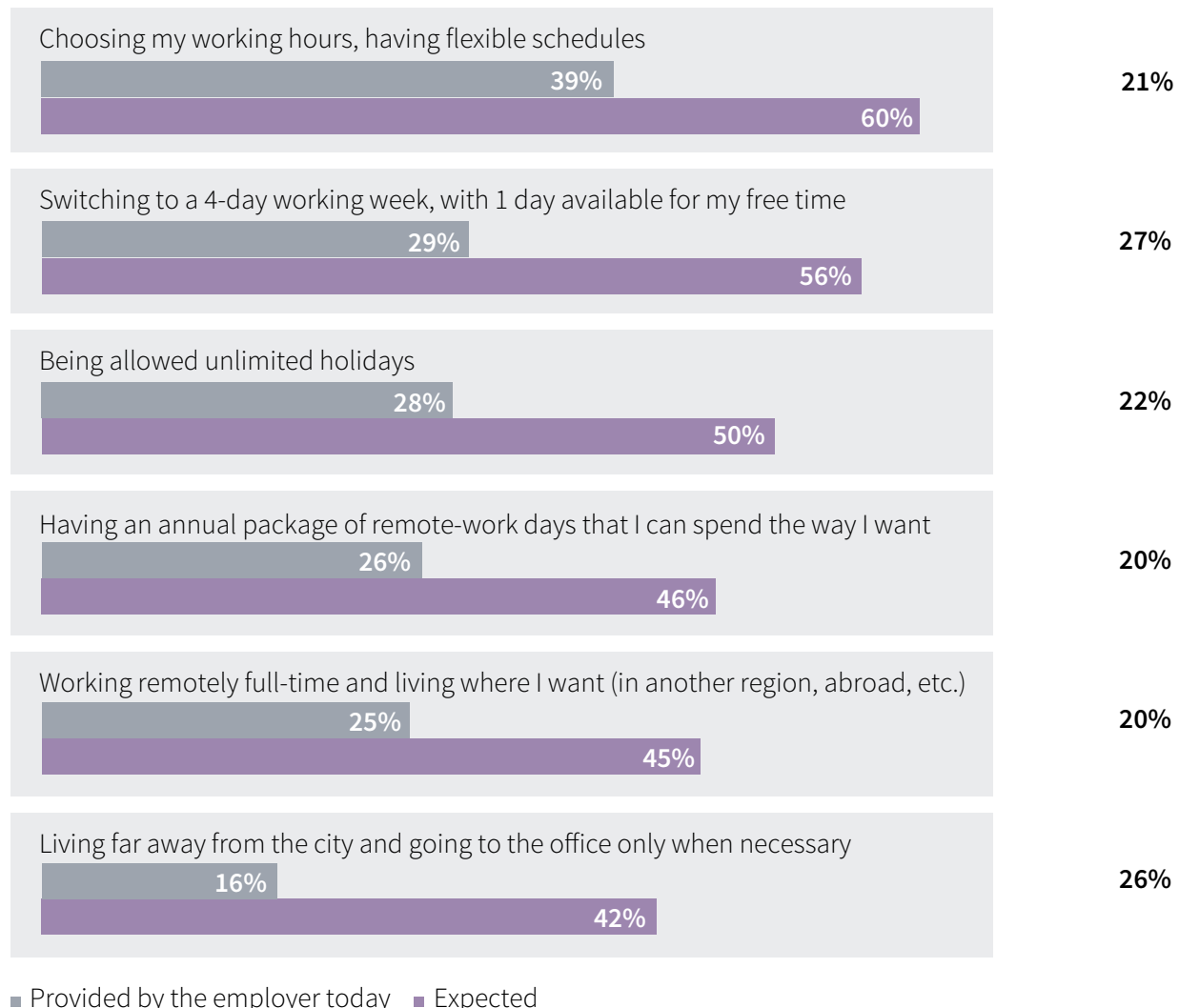
Q: Which of the following would make you consider leaving your current employer?

Source: JLL Workforce Preferences Barometer, 2022

As observed in the previous surveys, flexibility aspirations have now gone far beyond simple homeworking arrangements and this has created an opportunity for employers to reconsider their approach to working time. Meaningfully, the biggest gap between employees' expectations and employers' offer today is the four-day working week. This highly symbolic step is the perfect illustration of what could be a more aspirational approach to work. It is one that would establish a new trust relationship and empower the workforce to organize their week in a more efficient way and improve their quality of life.

Flexibility options: current practice vs. expectations

Gap between Expectations
and Employer EVP today



Q: How appealing are these flexibility options to you at the moment?

Source: JLL Workforce Preferences Barometer, 2022

Finally, quality of life can also be improved in the office through very pragmatic initiatives like free perks, social events and stress management support. These have become key levers to create a more attractive workplace.

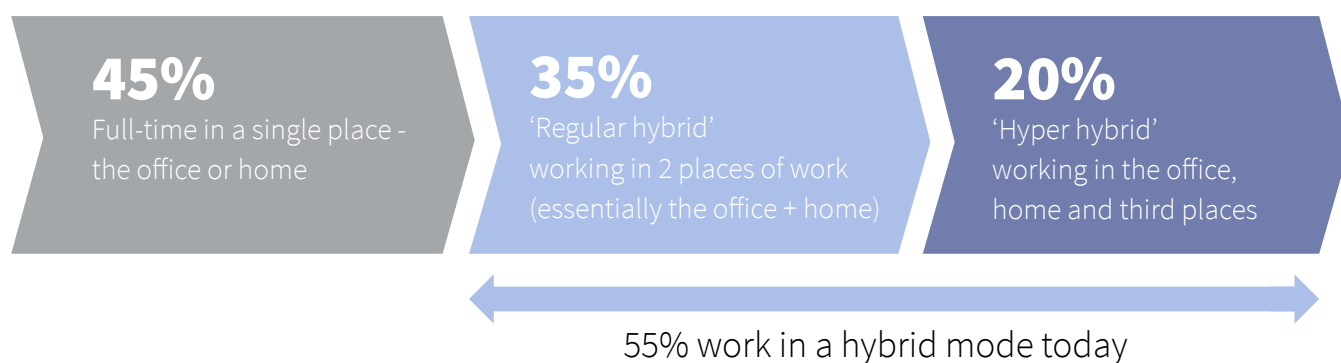
- 43%** of the workforce would appreciate **subsidized travel to their office**
- 43%** free access to **fresh and healthy food** on-site
- 27%** **discounts and partnerships** with amenities near the office
- 26%** **social events**
- 25%** free **coaching to promote health** and reduce stress



Insight #6

The responsible employer of the future will focus on taking care of the health of their people.

If 'work from anywhere' is the next step for hybrid work, it will be an equilibrium that is hard to achieve. It is a workstyle which is both full of promises and challenges in terms of individuals' mental state. Our analysis highlights interesting distinctions across the hybrid work continuum:



The most hybrid-oriented workers, the 'Hyper hybrid', are the ones that alternate between the office, their home and work in third places like coworking facilities. They represent 20% of office workers today. In terms of emotional profile, they are the most engaged, empowered and enthusiastic about the changes taking place in the workplace; but they are also the most overwhelmed and stressed group.

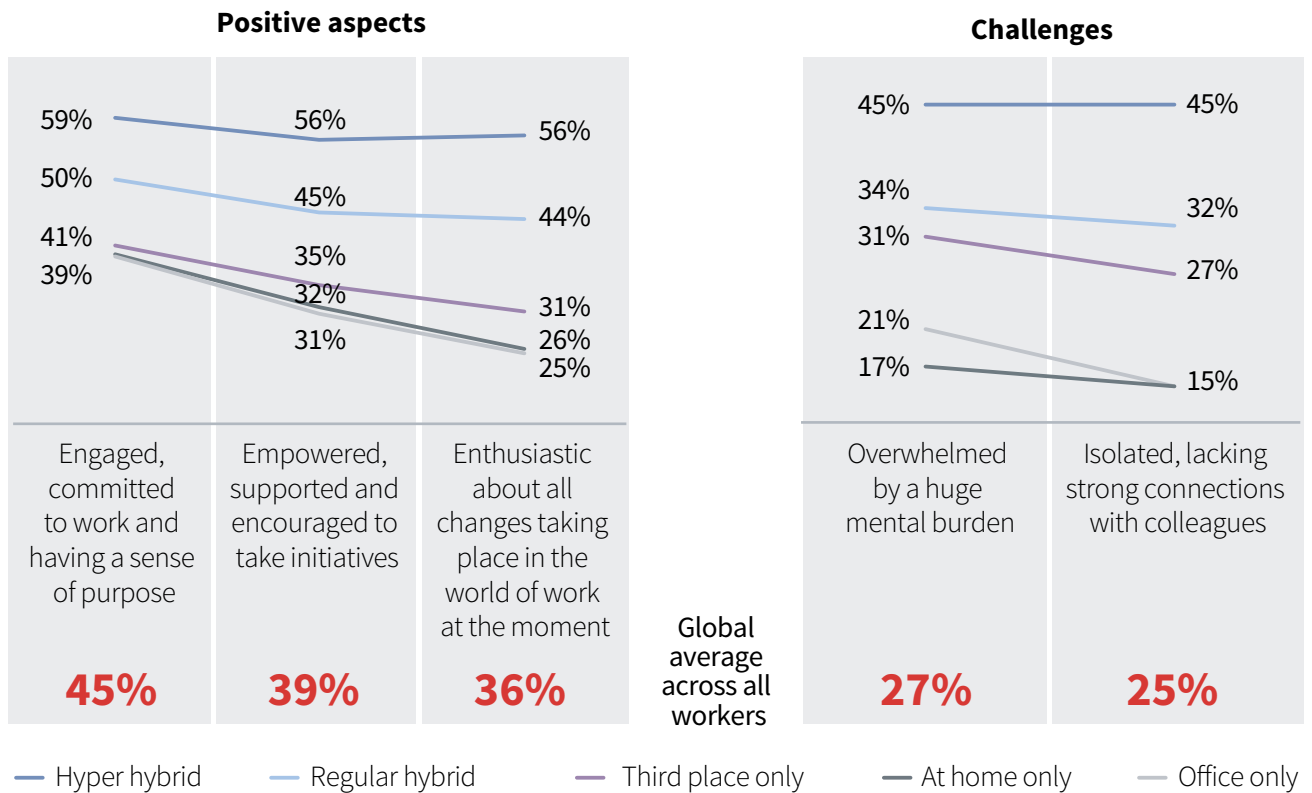


'Regular hybrid' employees alternate between two places of work only and account for 35% of the office worker population. They have an intermediate emotional profile.



At the other end of the spectrum, employees working full-time in one place - the office, home or a third place - prove to be less engaged and empowered while also more content in terms of their mental state. People working in 'third places only' do not really feel engaged and empowered but still feel rather overwhelmed and isolated, revealing the difficulty for them to find a proper working routine and establish robust social anchors.

Mental state by workstyle:



Q: How would you describe your current state of mind? (Scores 8 to 10 on a scale from 0 to 10)

Source: JLL Workforce Preferences Barometer, 2022



Adopting a given workstyle has a direct impact on attitudes to work and to the workplace. It is associated with distinct quality-of-life expectations and a singular vision of hybrid work in the long run.



Office workers...

- Are driven by quality of life and pay
- Need purpose and balance in their job
- Expect health and wellbeing amenities
- Consider the office as central to their working life
- Would appreciate free access to fresh and healthy food



Homeworkers...

- Are driven by quality of life and pay
- Expect full flexibility in their job – to work and live where they want
- Consider hybrid as key to talent retention
- Expect to be supported in their workstyle by their employer
- Go to the office to collaborate, manage and socialize
- Would be incentivized by subsidized travel to the office and access to fresh and healthy food



‘Regular hybrid’ workers (Home + Office)...

- Are driven by quality of life, health support and pay
- Expect balance and flexibility in their job
- Consider hybrid as key to talent retention
- Expect to be supported in their workstyle by their employer
- Miss human interactions when they work remotely
- Go to the office to collaborate, manage and socialize
- Would be incentivized by subsidized travel to the office and access to fresh and healthy food



‘Hyper hybrid’ workers...

- Expect health support from their employer, social connection and visibility
- Want to be offered a healthy lifestyle, to be looked after and have access to a range of health and wellbeing amenities
- Expect to be supported in their workstyle by their employer
- Consider hybrid as key to talent retention, but also consider the office as central to their working life
- Miss the professional environment, boundaries with private life, office routine and managerial support while they are working remotely
- Go to the office to look for an innovative environment, connection with the company culture and to recharge mentally
- Would be attracted by a sustainable office design and a fully open and collaborative work environment
- Are drawn to the ‘Hub & Club’ model (central headquarters + satellite offices)

Conclusion

The four profiles of office workers (Office workers, Homeworkers, ‘Regular hybrid’ workers and ‘Hyper hybrid’ workers) reveal that, if flexibility in the place of work is key to empowerment, then having to constantly adapt to new work environments raises significant risks in terms of mental wellbeing. This work agility needs to be developed gradually and supported carefully through dedicated health coaching

and access to a relevant range of health and wellbeing amenities. The responsible employer of the future will be the one that helps their hybrid workers to manage healthy boundaries between their professional and private lives, maintain their social connections and redefine their healthy routines and rituals. By doing so, they will make sure ‘hybrid’ translates into empowerment and fulfillment.





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



Flore Pradère (Research Author)
Work Dynamics Research Director, Global
flore.pradere@eu.jll.com



Amber Schiada
Head of Work Dynamics Research, Americas
amber.schiada@am.jll.com



Marie Puybaraud
Global Head of Research, JLL Work Dynamics
marie.puybaraud@eu.jll.com



Christian Beaudouin
Insight and Advisory Research Director, Americas
christian.beaudoin@am.jll.com



Tom Carroll
Head of Research & Strategy, EMEA
tom.carroll@eu.jll.com



Scott Homa
Property Sector Research Director, Americas
scott.homa@am.jll.com



James Taylor
Head of Work Dynamics Research, Asia Pacific
james.taylor@ap.jll.com

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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 CO₂e by advising clients on renewable energy projects. For more information visit jll.com/FutureofWork

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