



Shape The Future of Work

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JLL's Global Research



Global Research | June 2020

The future of global office demand



Global Research | August 7, 2020

Global Real Estate Perspective

Investor and Corporate



Global | July 2020

Research

The impact of COVID-19 on flexible space

What the future holds in a fast-paced world affected by the pandemic



Global | Oct 2020
Research

From productivity to human performance

Designing workplaces where people thrive and performance flourishes



January, 2021

Global Research

Reimagine

The new future of work to shape a better world



Global Research | November, 2020

Reimagining Human Experience

How to embrace the new work-life priorities and expectations of a liquid workforce



Asia Pacific | September 2020

Research

Optimism in the face of crisis



Global Research | November 10, 2020

Global Real Estate Perspective

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Global Real Estate Transparency Index, 2020

Transparency, Digitization, Decarbonization

The imperative for transparent, sustainable and resilient real estate



Global | July 2020

Research

COVID-19 IMPACT: offices will find a new purpose

Workforce insights on human performance



Global | July 2020

Research

Reimagine for Corporate Occupiers

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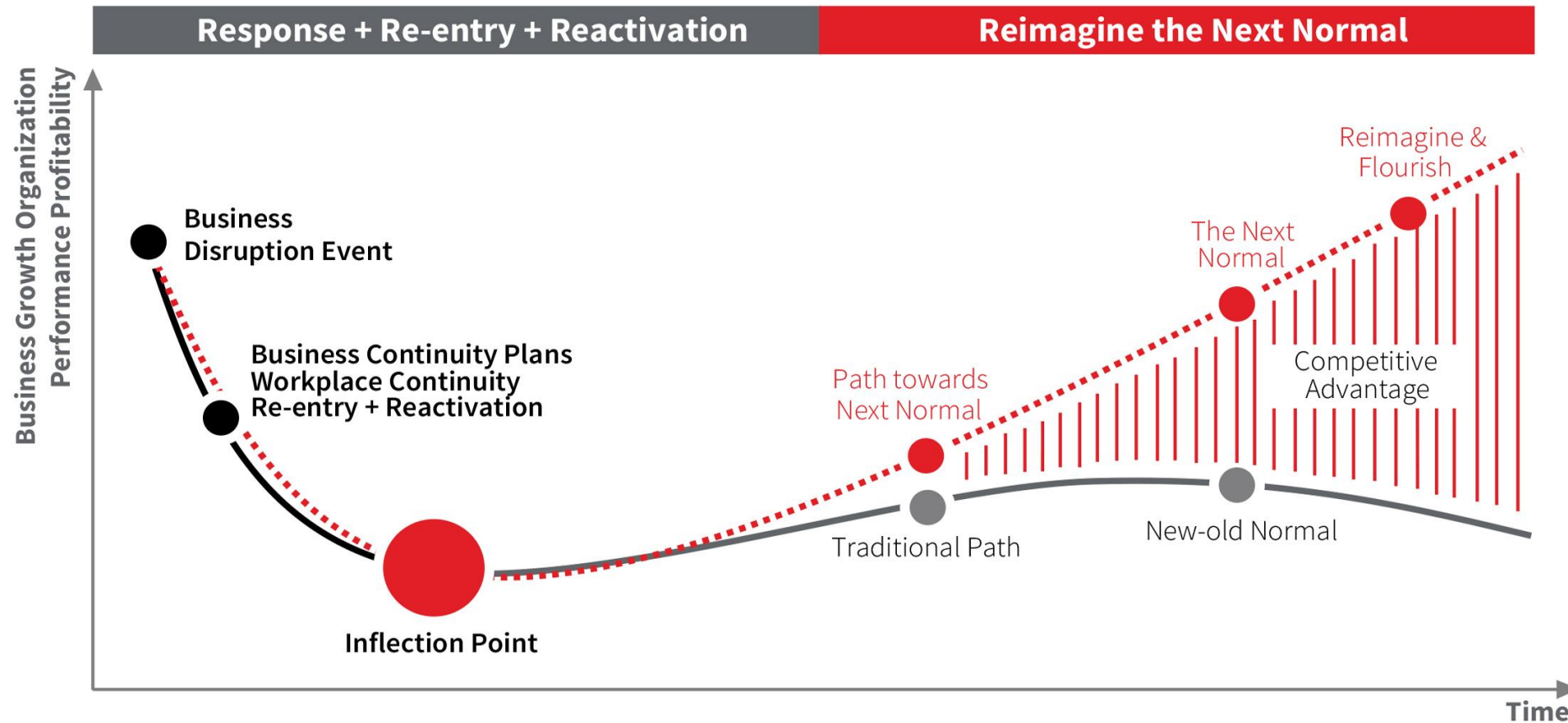
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A resemblance to normalcy will be reached beyond 2021



Source: JLL 2020

Reimagine the Future of Work: Key Big Themes & Drivers to enable Work, the Workforce and the Workplace



A Worker Centric World:	The Digital & Sustainability Enablement:	A Health & Wellness Imperative:
<p>Human Experience</p> <ul style="list-style-type: none"> Productivity Flexible Working Remote Working / WFH/Anywhere Mentoring / Training Talent Attraction Human + Machine Collaboration <p>+</p> <p>Human Performance</p> <ul style="list-style-type: none"> Hybrid Model Community Engagement Health & Well-being Distributed Workforce Inclusion & Diversity Experiential Workplace Purpose & Meaning Workforce Preferences 	<p>Technology / Digital Enablement</p> <ul style="list-style-type: none"> Immersive Digital Collaboration Digital Twins (Buildings & People) Virtual Office Experiences AR/VR Platforms Sensors Everywhere Internet of Things (IOT) <p>+</p> <p>Sustainability / Responsibility</p> <ul style="list-style-type: none"> Operational Resilience Financial Management Environmental Performance ESGR Leading Practices Stakeholder Capitalism Eco-Healing Practices Responsible Real Estate Practices Community & Social Engagement 	<p>Healthy Workplaces</p> <ul style="list-style-type: none"> Healthy Assets Wellness & Healthy Ecosystems Indoor Air Quality Hygiene & Cleaning Health & Safety Protocols Social Distancing Safe & Trusted Workplace <p>+</p> <p>Health Footprint</p> <ul style="list-style-type: none"> Social Resilience Shadow Pandemic Impacts Health & Social Inequities Disability Challenges Mental Health Challenges Stress/Burnout Epidemic Long-term Workforce Impacts Economic Challenges Systemic Resilience.

Workforce preferences



Work from anywhere

Remote work should double, going from 1.2 days pre-pandemic to 2.4 days a week post-pandemic.



Collaboration

70% of employees find that the office environment is more conducive to team building and management support.



Patterns of work

74% are attracted by a 4-day working week and 71% are expecting more flexible schedules.



Support

75% are expecting their company to support their work at home.

Allowance

1 in 3 are asking for a dedicated allowance

Priorities

Work-life balance (72%) has overtaken securing a comfortable salary (69%) in terms of importance post-pandemic.



Liquid Footprint

66% of employees are expecting to be able to work from different locations post-crisis.

Hybrid

50% of the workforce want to work both in the office and remotely and 1 in 3 employees are expecting less density and some physical separation in the workplace

Social Hub

24% want to work exclusively in the office and 74% of employees still want the ability to come into an office

Experience

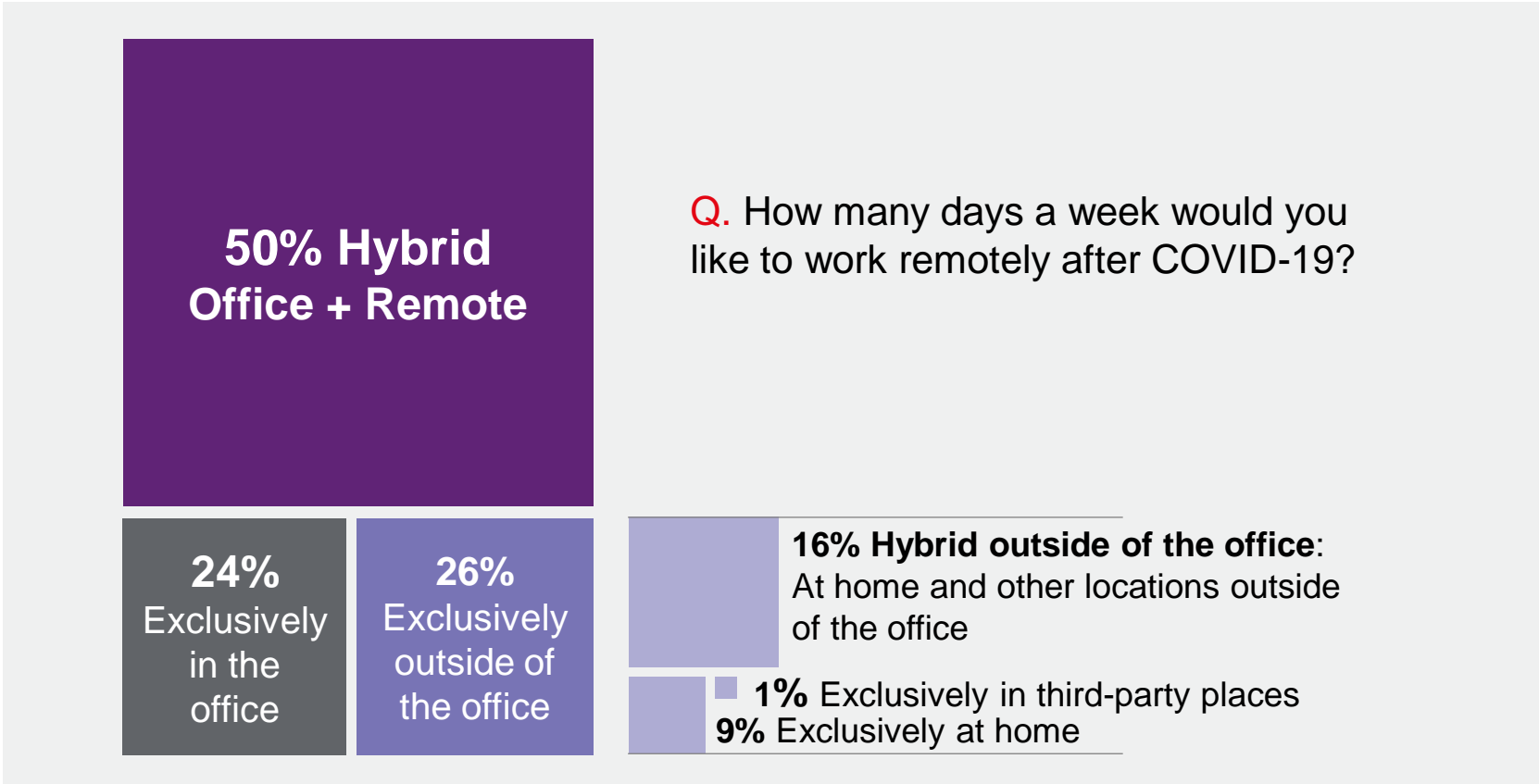
49% of employees are expecting socialization spaces to boost their experience in the office.



Choice and empowerment: people want to be able to choose from a wide variety of places



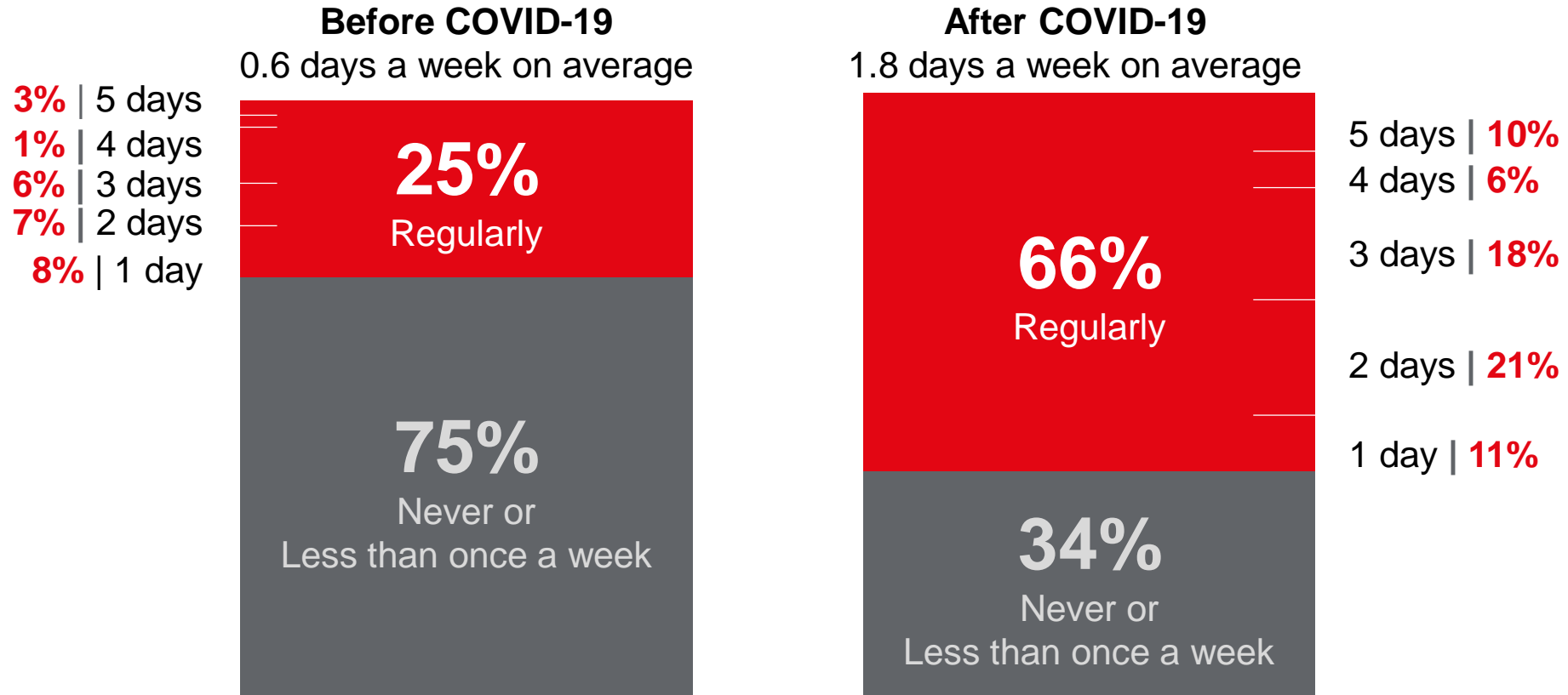
66% of employees want to be able to alternate between different places of work



Work-from-home



66% of employees want to make it a regular habit, 2 days a week on average



Q. How many days a week would you like to work remotely from home after COVID-19?
How often did you work remotely before COVID-19?

3 out of 4 workers expect advanced services focused on health, wellbeing and nutrition

Top 5 services expected by employees post pandemic

Well-being services



Advance food services



Health services



Sports services



'Life is easy' service

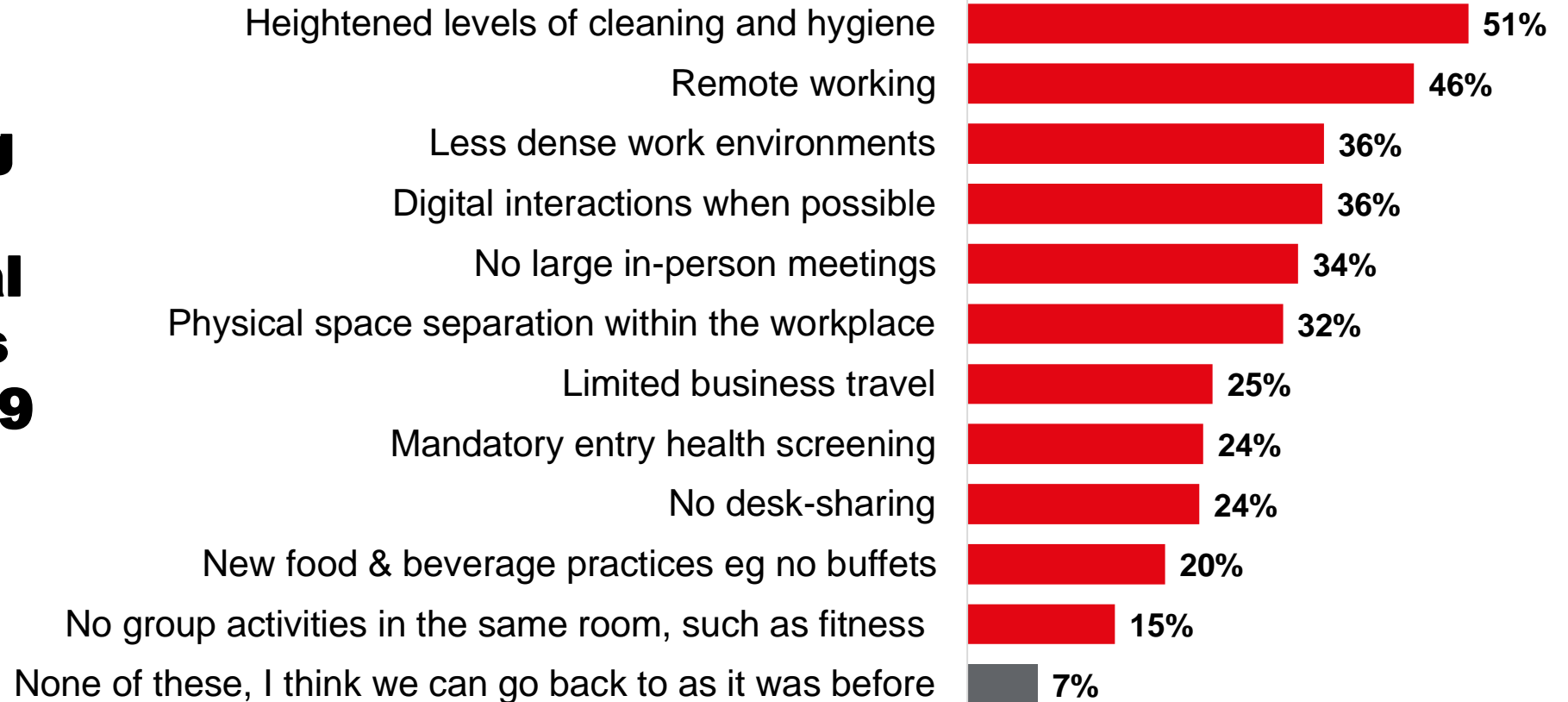


■ This would not change anything for me ■ I already benefit from this option ■ This would be nice ■ This would be wonderful

The pandemic has created new working “standards”, which will require HR & workplace partnerships



Some working routines will remain crucial for employees after COVID-19



Top spaces to boost employee experience (full results)



Top spaces to boost the employee experience in the office



Q. What kind of spaces would significantly boost your experience in the office?

McKinsey: Optimizing the hybrid virtual continuum

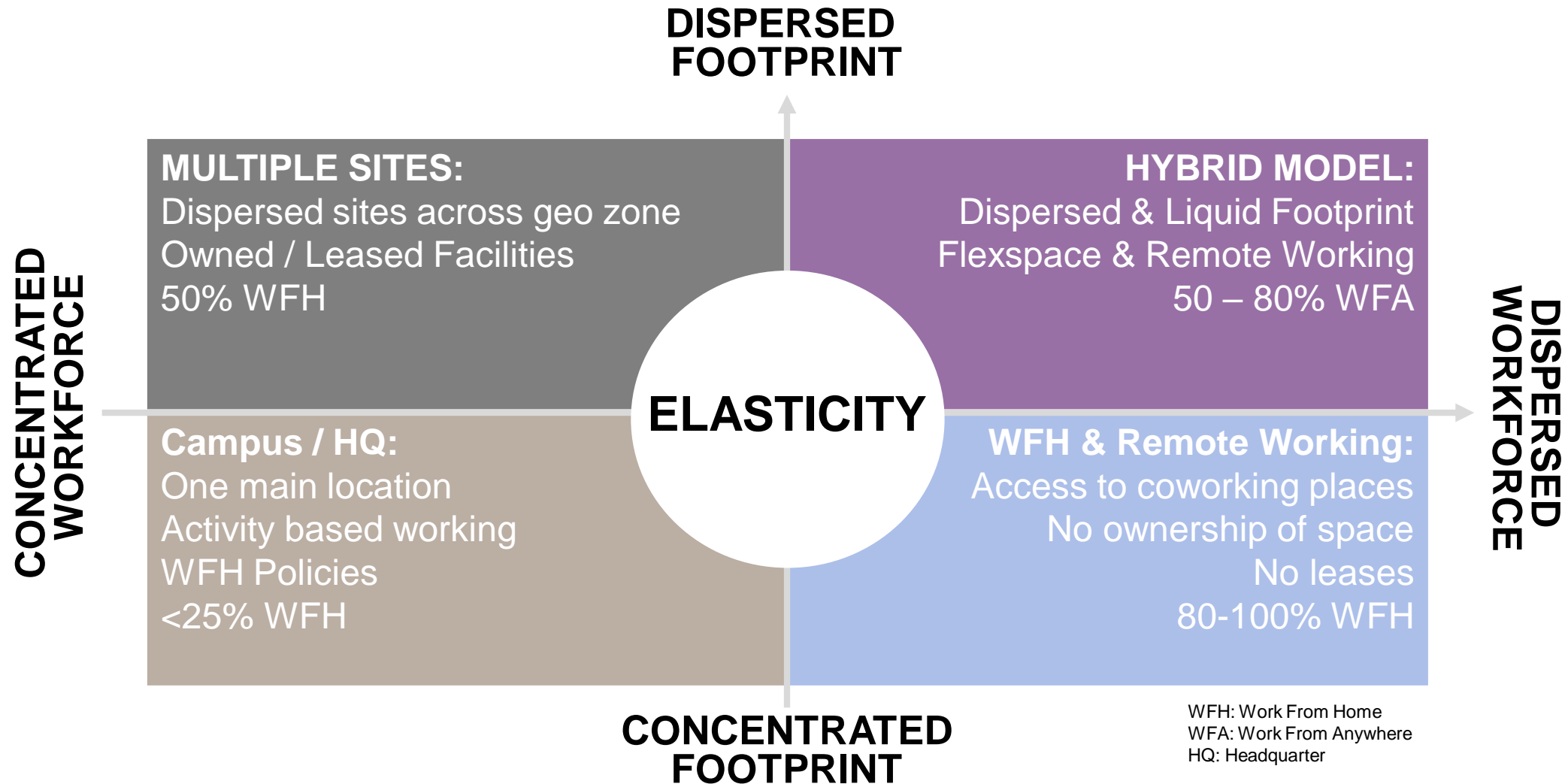


Six emerging models reflecting a mix of on-site and remote working

<div> <div></div> Desirable outcome <div></div> Cost to be managed </div>			Ability to access talent	Productivity (individual and team)	Cost of real estate
Almost entirely on premises	1) limited remote work with large headquarters	Company leaders and employees are centralized in 1–2 big principal offices			
Hybrid models	2) partially remote work with large headquarters	Company leaders and most employees spend majority, but not all, of their time within 1–2 principal offices			
	3) partially remote work with multiple hubs	Multiple proportionate-size offices with leadership and employees dispersed among all offices			
	4) multiple micro-hubs	Leadership and employees dispersed across small-footprint “micro-hubs” located in various geographies			
	5) partially remote work with flexspace ¹	No permanent offices; rented flex space used for periodic in-person collaboration (but not connectivity)			
Almost entirely off premises	6) mostly remote work with no office sites				

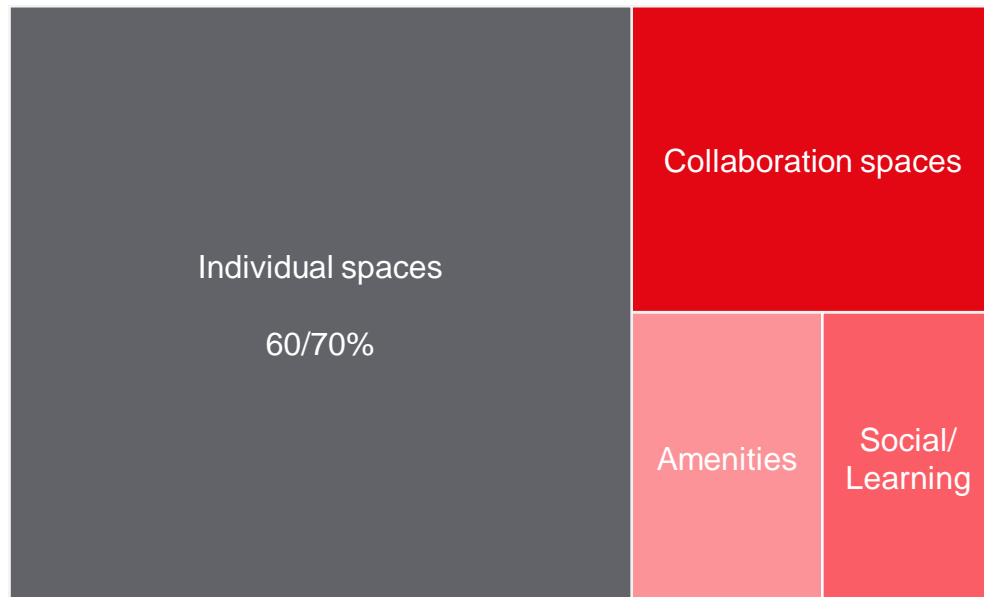
¹ Flex space includes temporarily (eg, monthly) rented space used in select cities for periodic gathering and collaboration.

New Future of Work Scenarios Emerging with Elasticity



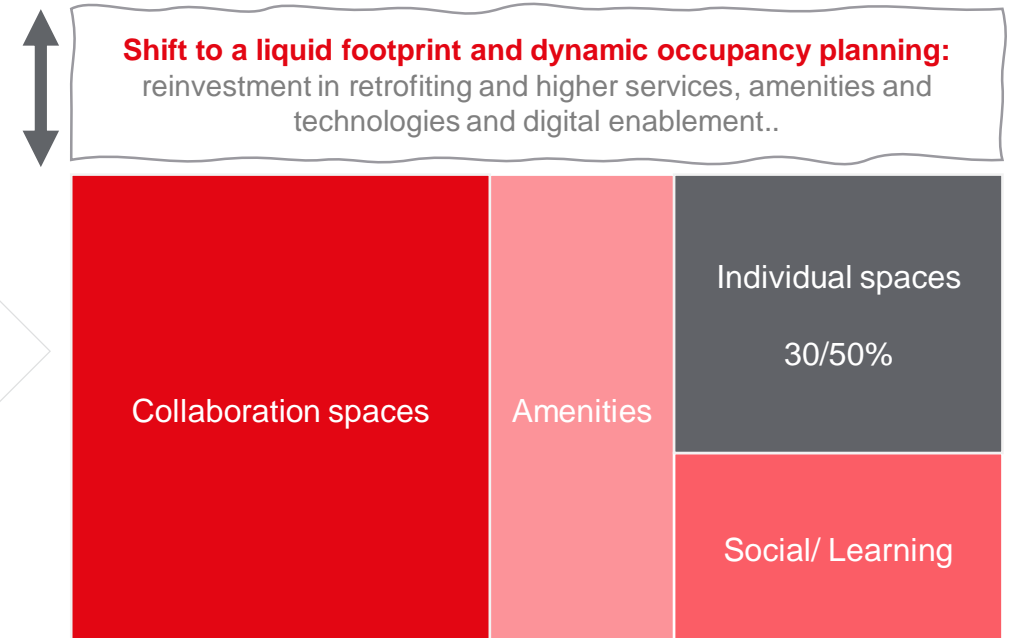
What is the new hybrid deal?

Historical Office/Workplace Allocation



ELASTICITY
ADAPTATION
RESPONSIBILITY

Future Office/Workplace Allocation



The office is a *social hub* and
a place for collaboration

Employee Workplace Experiences: The Next Normal



High-quality employee experience regardless of “where” employees may work



In-Office



Work-From-Home



Work-From-Anywhere

Commute experience | Meeting experience | Dining experience | Client experience | Training experience

**Safe &
supported**

**Productive &
engaged**

**Well &
empowered**

**Communal &
fulfilled**

The future workplace could look like

A place to learn, connect, contribute, and to socialize...with amenities and services that merge the boundaries between home life, social life and work life.

Further insight:



- Research | [Shaping the future of work for a better world](#)
- Research | [Shaping human experience: A focus on hybrid work and four emerging worker profiles](#)
- Research | [Better than normal: Vision 2021](#)
- Article | [Four reasons your office location matters more than ever](#)
- Article | [Why healthy buildings are good for the bottom line](#)
- Podcast | [What will “normal” look like post-COVID](#)
- Article | [New job roles appear to manage new ways of working](#)
- Podcast | [When will it be safe to go back in the office?](#)
- Article | [Should your Chief Remote Officer be a Robot?](#)
- CHRO Playbook | [Three essential truths driving workplace change due to COVID-19](#)
- Research | [Global Real Estate Perspective 2021](#)

Thank you

<https://www.us.jll.com/en/trends-and-insights/research/reimagine-the-new-future-of-work-to-shape-a-better-world>

