



Global Research | November, 2020

Reimagining Human Experience

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

Introduction

As many countries go through lockdown again, companies around the world are realizing that the way they work will drastically change over the long term. With the forced mass work-from-home experiment, employees have shown that, if supported by the right technology, they are able to work remotely and efficiently at large scale and without significant loss in productivity. They have also demonstrated their loyal engagement and commitment in highly challenging times. In return, they are voicing new expectations that employers can no longer ignore.

In our latest research¹, we have analyzed employee sentiments of more than 2,000 office workers across 10 countries. We have learned about how workforce preferences are shifting workplace priorities, with results revealing a renewed focus on quality of life, human scale and new aspirational values.

¹Online survey of 2,033 office workers across 10 countries, spanning all major industries conducted October 2020.



Key insights

uncovered by the research include:

1



The long-term impact of remote work on working and living patterns.

This has compelled employers to urgently deconstruct the notion of the traditional corporate workplace so as to enable more elasticity and flexibility in workstyles and, ultimately, work from anywhere:

- **72%** of employees want to continue working from home on a regular basis post-crisis, and a majority want to do so **at least 2 days a week**.
- **75%** are expecting their company to support their work at home
- However... **24%** of employees want to work exclusively in the office.
- And **70%** are in favor of a hybrid model, where they can head to the office to work in teams, manage and be managed, or solve complex problems.

2



An imminent opportunity for employers to sustain and reinvigorate employee engagement.

This will require companies to build a worker-centric workplace to better address the rising expectations of the workforce:

- **Work-life balance (72%)** has overtaken securing a comfortable salary (69%) in terms of importance post-pandemic.
- **A conscious, local and healthy lifestyle** has become as important to employees as finding a sense of purpose in their work.
- **74%** of respondents are attracted by a 4-day working week, with 1 day available for their free time.
- **3 out of 4** are expecting their employer to support their health, well-being and nutrition.

3



The growing importance of human connection, despite the rise of more distributed and digitally-connected work.

- **1 in 3** employees are asking for renewed collaboration practices: less dense work environments and digital interactions when possible.
- **Their top 2 expectations** are for spaces that foster socialization and provide a direct connection to the outdoors.
- **1 in 2** also expect new focused work spaces to support meetings with colleagues working remotely.

Our research shows that in order to flourish in the ‘new normal’, employers will have no choice but to:



Lean into workforce preferences – and technology will be a key enabler of new working models.



Pull in live, rich data to inform CRE strategies, identifying and capturing the new human metrics that matter in this new world of work.



Push out human-centric solutions to enable work from anywhere.



A rapid transition toward hybrid working: the crisis is accelerating the transformation of work at an incredible pace

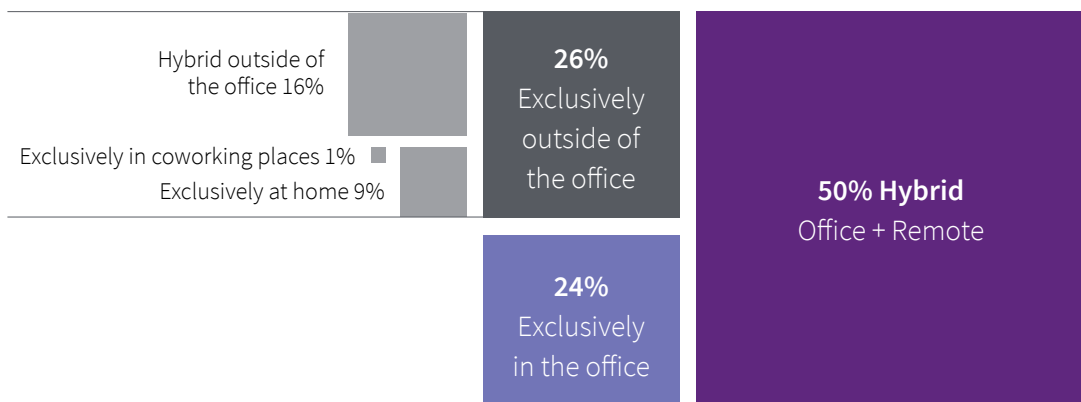
Hybrid work is the new normal and now the preferred way of working.

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

50% want to work both in the office and remotely, and 26% do not want to head to the office anymore.

Remote work frequency after COVID-19

2.4 days a week on average



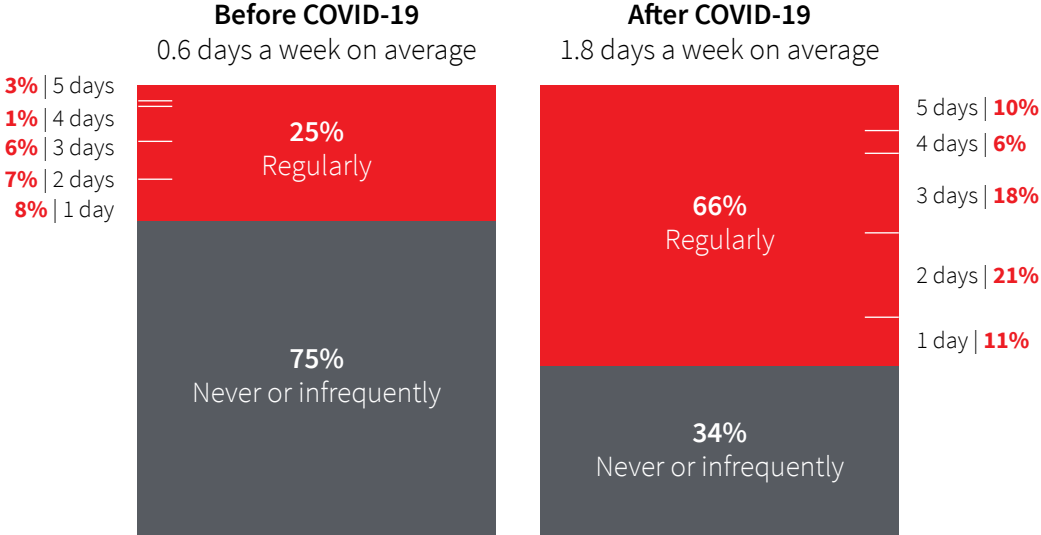
Q. How many days a week would you like to work remotely after COVID-19?

Sample : All respondents n= 2033

As a result, 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).

Work-from-home frequency



Q. How often did you work remotely before COVID-19?
 How many days a week would you like to work remotely from home after COVID-19?
 Sample : All respondents n= 2033



While expressing a growing appetite for these new ways of working, employees are also voicing new expectations regarding the support they receive from their employer. They want companies to enable work-from-home, not just through providing the right technology platforms but also through new HR policies (work-from-home contracts, allowance, training, perks, etc.).

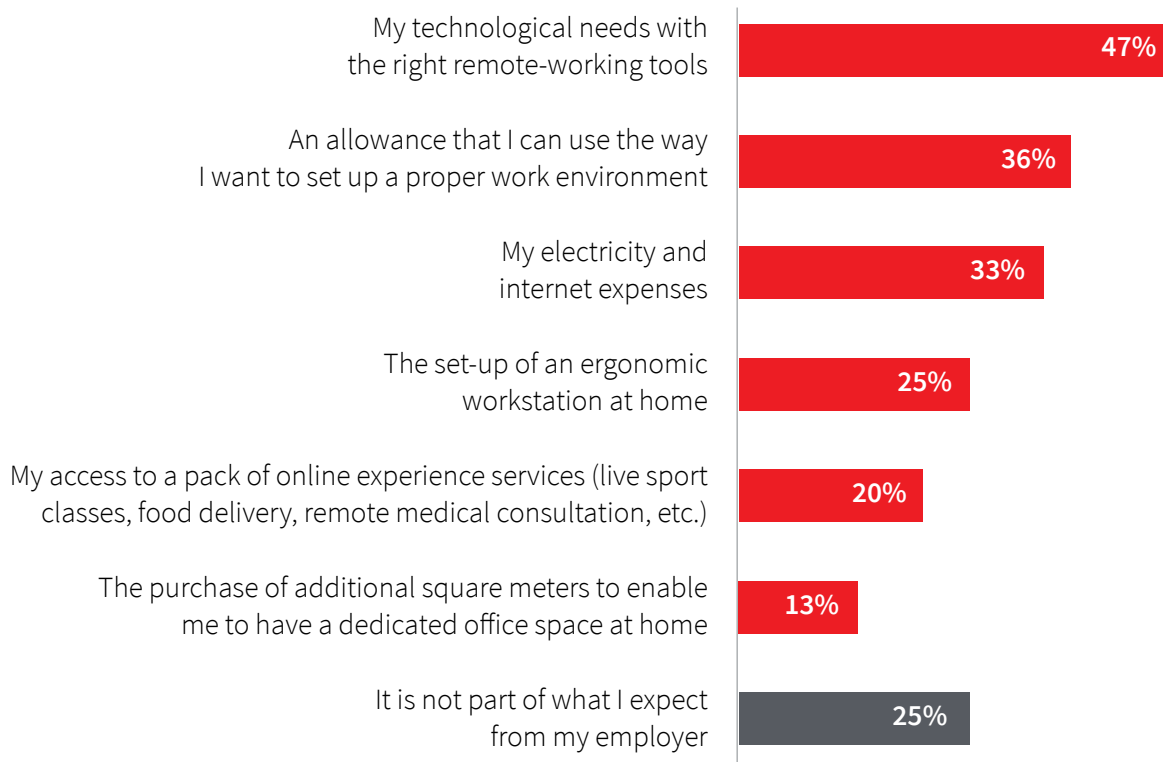


75% are expecting their company to support their work at home.

1 in 3 are asking for a dedicated allowance.

Employees' expectations while working from home

I expect my employer to support...



Q. Do you expect your employer to support your remote working at home?

What is the most important support you expect from your employer?

Sample : All respondents n= 2033

74% of employees still want the ability to come into an office.



Work-from-home is not the panacea for satisfying all working needs and workstyles.

The current crisis is requiring employers to decouple traditional work and workstyles from the corporate office. Hybrid work will be the answer to providing greater employee choice. As seen earlier, some employees do not want to work remotely: 24% want to work exclusively in the office while 50% are asking for a hybrid approach – which

means that nearly three-quarters of employees want the ability to come into an office. In addition, some working needs remain better supported by the office: 70% of employees find that the office environment is more conducive to team building and management support.

The office is the preferred location for some crucial activities

To learn and grow



To socialize



To solve work-related issues



To collaborate and run meetings



To manage or be supported by your management



■ Better in the office ■ Better at home ■ Better in a third-party place

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

The workforce is emotionally pressured and is asking for more in return

Emotional engagement is at risk: a call for employers to be more engaged and more caring for their workforces.



51% of employees are concerned about the future and worried about losing their job. COVID-19 has amplified existing workplace stressors that are taking a toll on workforce mental health.

Mood barometer (From 0-lowest to 10-highest)

■ 0-5 ■ 6 or 7 ■ 8-10

Have a **wait-and-see** attitude



Afraid of the future, worried about my job



Q. How would you describe your current state of mind?

On a scale from 0 to 10 (highest rating)

Sample : All respondents n= 2033

In parallel, the crisis has driven employees to rethink their priorities, with a renewed focus on quality of life, human interactions and personal values.

Work-life balance (72%) has overtaken securing a comfortable salary (69%) in terms of importance post-pandemic. And a conscious, local and healthy lifestyle has become as important as finding a

sense of purpose in work: this is a priority for more than 60% of employees today. This will require employers to adapt if they want to preserve their ability to attract and retain talent in the future.

Shifting priorities

Commuting less, working and living locally and consciously



Working in a company that ensures my physical and mental health



Having a great work-life balance, spending more time with my family



Feeling connected to my work community



Being offered a healthy lifestyle



Living memorable moments with my colleagues ‘in real life’



Finding a sense of purpose in my work



Being pampered, getting special employee perks



Securing a comfortable salary/pay



Identifying with the values of my company



Being rewarded and recognized by my leadership and my peers



Being offered a fast promotion path



■ This has become a new priority for me since the onset of the pandemic ■ This has always been a top priority for me

Q. In light of the current crisis, how have your priorities evolved regarding your work ?
 Sample : All respondents n= 2033

Work-from-home is enabling fulfillment and empowerment. But employees want more.



74% are attracted by a 4-day working week.

Employees are asking for greater work-life flexibility. A four-day working week is becoming a desirable reality.

Outside of work-from-home, they are requesting more flexible time arrangements and alternative places of work. 71% are expecting more flexible schedules, 57% want to have wider choice in terms of workspaces in the office, and 43% would like to be able to work from a coworking facility from time to time.

Employees are looking for more flexibility

Choosing my working hours, having flexible schedules



Switching to a 4-day working week



While in the office, being able to choose the most suitable space for specific tasks



Working from a coworking facility close to my home, at least 1 day a week



■ Not really appealing ■ Appealing ■ I already benefit from this option

Q. Some companies are providing new flexibility options to their employees. How appealing are they to you?
Sample : All respondents n= 2033

Employees also expect new kind of ‘experience’ services.

Back to basics. Ahead of any other perks, employers will have to take care of their employees’ health, well-being and nutrition. This has become an expectation of 3 out of 4 employees.

Growing demand for new kinds of services

Well-being services



Advanced food services



Health services



Sports services



‘Life is easy’ services



Mobility solutions



Service desks such as IT desks



Cultural services



Beauty services



Childcare services



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

Q. What kind of services would you delight in having access to?

Sample : All respondents n= 2033

The workplace of the future will have to be more human-centric than ever

There is a need for growing connectivity between physical and digital environments. Employers must reimagine the dynamic between the physical and virtual workplaces to meet employees' demands.

They need to accommodate the requirements imposed by the health crisis and to provide reassurance to employees, but they also have to address the overriding need for social interactions and a sense of purpose.

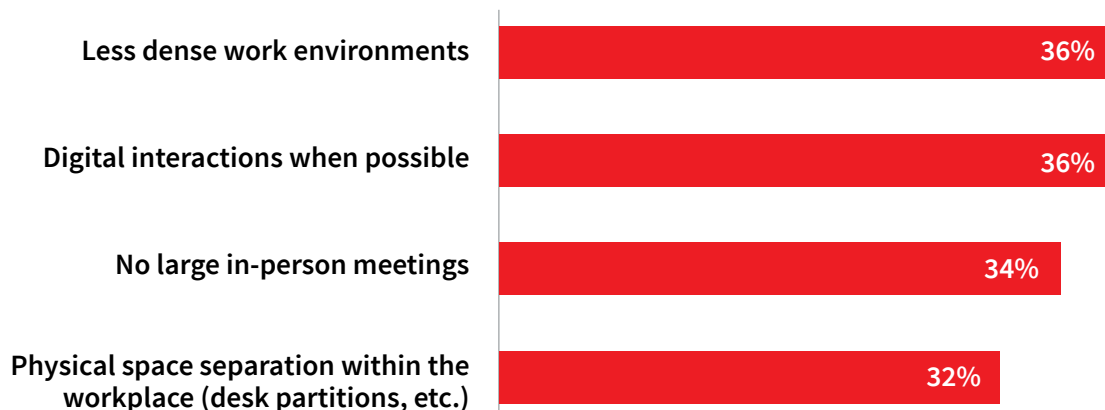
Face-to-face interactions in the office, despite being crucial, will have to be adapted to cope with the current crisis for months to come.



1 in 3 employees are expecting less density

and some physical space separation in the workplace, digital interactions when possible, and no large in-person meetings in the short term.

New working practices imposed by the pandemic are here to stay...



Q. Which new habits and working routines will remain crucial for you after COVID-19? I expect my company to continue with...

Sample: All respondents n= 2033



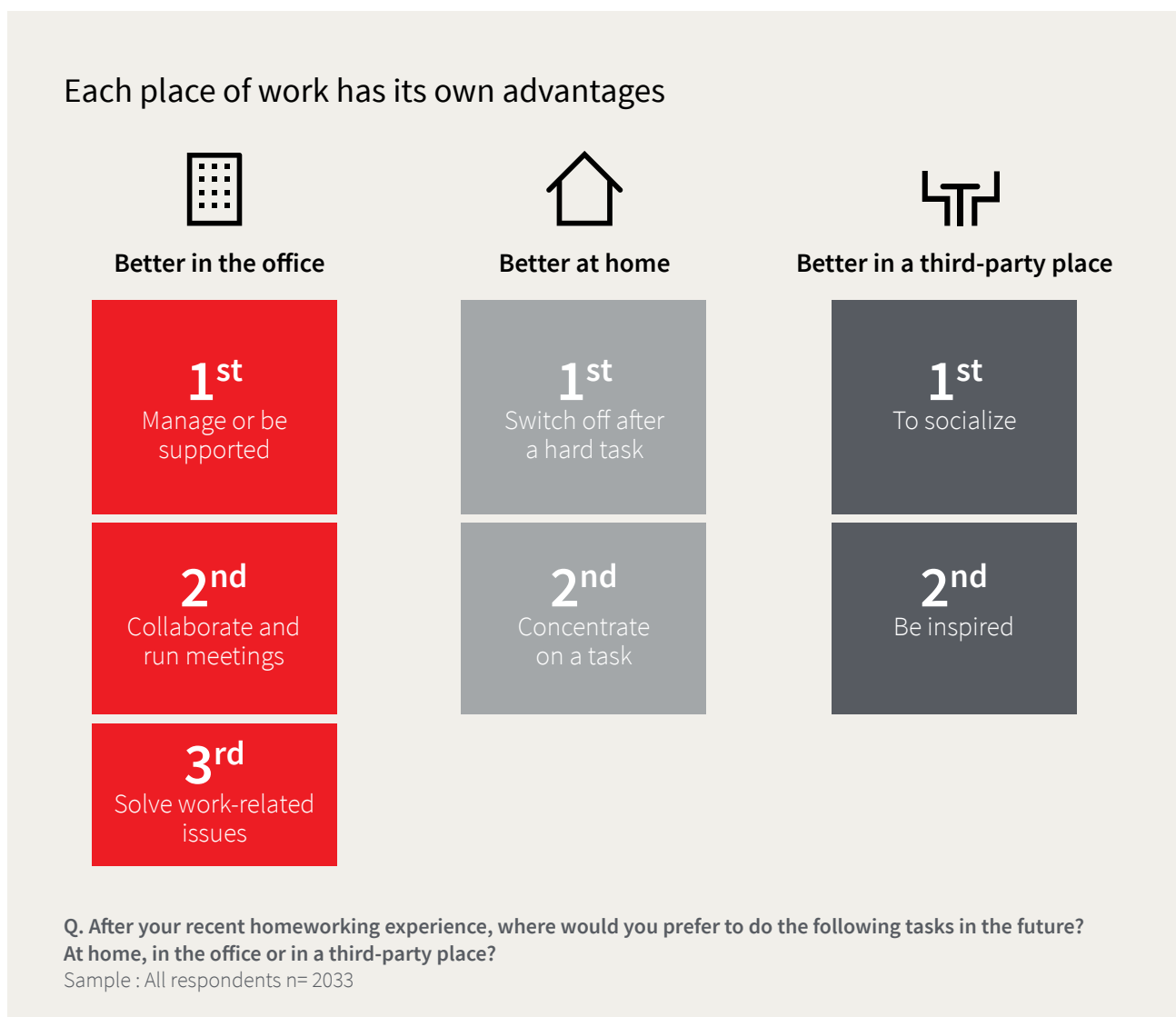
70% of employees consider that the office is the perfect place for team building, management support and carrying out complex tasks.

A new purpose for the office has emerged.

The office is evolving into a destination for in depth-collaboration, problem solving and career development.

In all these areas, the physical workplace can make a huge difference: 70% of respondents consider

that the office is the perfect place for team building, management support and carrying out complex tasks. On the other hand, work-from-home has revealed gaps in the efficiency of online collaboration and in leadership and managerial competencies.



Even so, offices fall short on key aspects of human performance today: disconnection and concentration.

All these tasks are not well addressed by today's offices in the eyes of employees. Only 25% consider that the office is the best place to disconnect after a hard task. And less than 1 out of 2 employees feel it is the right place to concentrate.

The office is revealing weaknesses and needs to evolve to support some important tasks

To switch off after a hard task



To concentrate on a task and deliver individual work



To be inspired



To create and innovate



■ Better in the office ■ Better at home ■ Better in a third-party place

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



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

The pandemic has driven people to prioritize what matters most in their work life.

First expectation: spaces that create a sense of community. Almost half of respondents want spaces that foster socialization and engagement with colleagues as well as spaces that give a direct connection to the outdoors (or 'green space').

There is also a need for new spaces dedicated to focused individual work.

Interestingly, this is the second most requested by employees today. If tomorrow's offices are to become social hubs, they will also have to accommodate hybrid working patterns and remote collaboration through offering private spaces and technologies to support meetings with colleagues who are working remotely.

Top spaces to boost the employee experience in the office

Socialization spaces

(coffee/tea areas, lounges, terraces, etc.)

49%

Spaces dedicated to focus work

(concentration pods, telephone booths, focus rooms, etc.)

44%

Spaces connected with nature

(outdoor spaces, plants, vegetable gardens, etc.)

44%

Learning and development spaces

(training rooms, library, VR café, etc.)

43%

Creative spaces

(brainstorming or 'design thinking' rooms, fab labs, innovation labs, etc.)

38%

Project and collaborative spaces

(pitch rooms or project rooms)

32%

Spaces for shared community interests

(vegetable gardens, beehives, spaces for artistic expression, etc.)

26%

Incubator

enabling talent to work on personal projects while making use of the company infrastructure, support and advice (finance, development, communication, etc.)

25%

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

Sample : All respondents n= 2033

The crisis has put under the spotlight the need to rethink space allocation in-depth and to promote a new model of 'space as a service'

This will provide new perspectives to workplace solutions which were not so popular in the pre-COVID world of work, such as hot-desking (i.e. unassigned desks). In order to meet new workforce expectations, employers will have to accelerate the switch from providing spaces to support individual work to offering a variety of on-demand spaces dedicated to collective needs. Employees are conscious that a 'new deal' needs

to be sealed with their employers: more freedom and choice, and more remote work and diversity in the office in exchange for their individual desk. This, today, is becoming a fair and rewarding agreement. 67% of employees would be prepared to switch to a hot-desk environment in exchange for a broader diversity of office spaces and increased access to work-from-home. This trend is even stronger among managers (77%) and young professionals (75%).

Employee readiness to switch to a hot-desk environment

67% yes

33% no

Q. If your employer was giving you access to a range of different kinds of workspaces, while increasing your work-from-home routine, would you be prepared to switch to a hot-desk environment where desks are freely available?

Sample : All respondents n= 2033



It's now the time to reimagine the Human Experience you offer to your employees...



Decode the new purpose of your office.

Define how work is being undertaken today and how your workplace can help. Articulate all new modalities of work to ensure continuity and fluidity between in-office work and remote work.



Research the notion of performance.

Create your own Human Performance model to identify the levers you can activate to boost the performance of your people.



Survey your workforce in a more meaningful way.

Know your workers preferences and monitor their mood, aspirations and workstyles to inform your CRE strategy and to support it in front of your C-suite.



Cross-collaborate with HR and IT.

Create a worker-centric workplace which enables work anytime and anywhere. Coordinate your workplace and technology policies with the HR agenda. Coach and train your workforce to sustain the new permanent state of work and fight against chronic fatigue and mental health issues.



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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