



Belux Workforce Preferences Barometer 2022



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



4,317 office workers

10 countries + **2** countries

300 respondents per country

➡ **242** in Belgium + **60** in Luxembourg

All major industries. Online survey, April 2022

Survey in BeLux performed by CSA Research in June 2022.

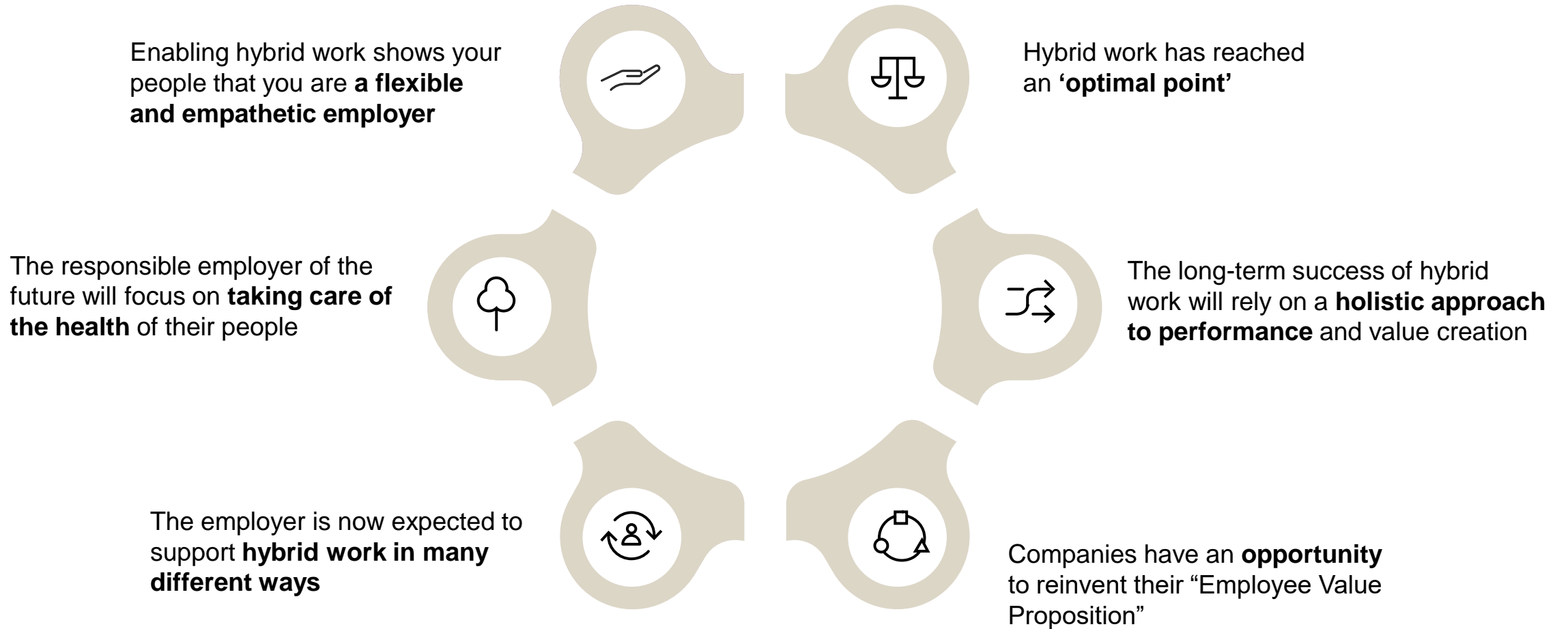
Respondents' profile:

- 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



JLL's workforce preferences barometer 2022

Key insights from our global research: hybrid work is the 'new normal' and health support is at the heart of employees' expectations



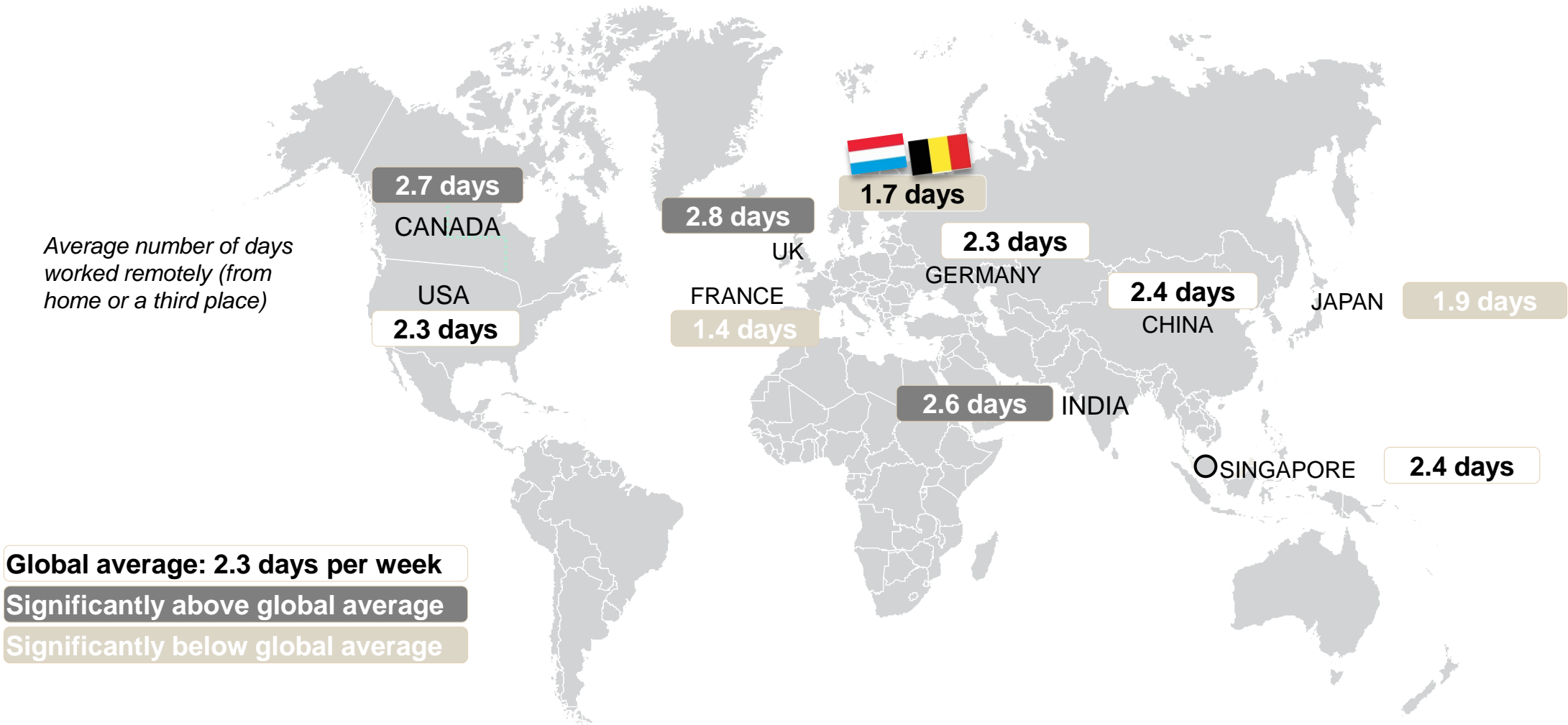


Insight #1: **Hybrid work has** **reached an** **‘optimal point’**



Remote work in BeLux is 1.7 days / week: well below the global average

In Belgium alone it is 1.9 days and in Luxembourg 1 day



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

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



The expected average working week in 12 months' time



3.24 days from the office
(vs. **3.28** currently)

1.76 days outside of the office
(vs. **1.72** currently)



0.44 days
from a third place
(e.g., coworking facility, hotel, etc.)
(vs. **0.4** currently)

1.32 days
from home
(vs. **1.32** currently)

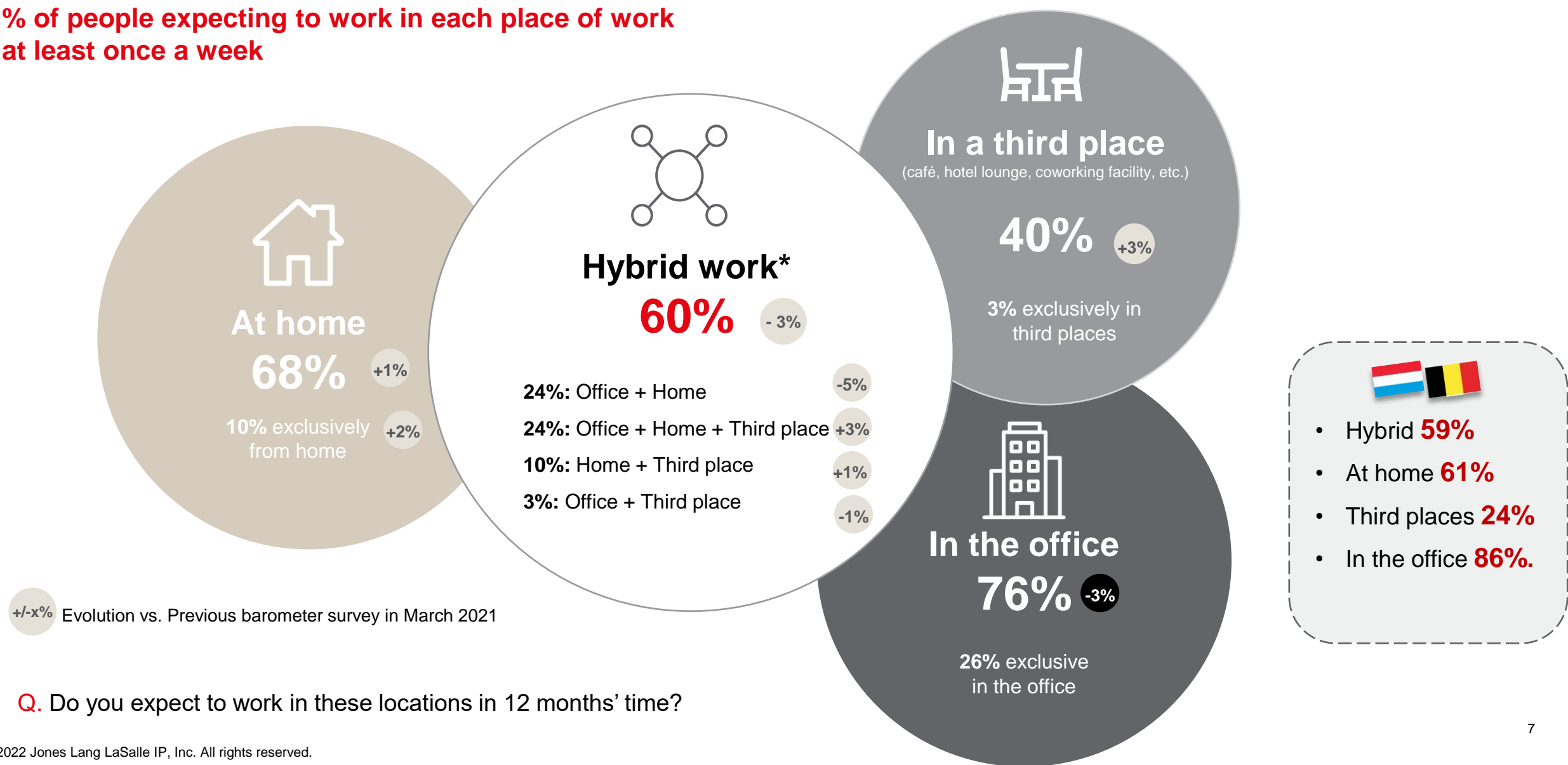
Q. How many days a week do you expect to be working in each of these locations in 12 months' time?

The Belux Workforce Preferences Barometer 2022

In Belux and elsewhere, the office is part of the desired working week of employees



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



Like the rest of the world, Belgian and Luxembourg employees will keep their office as a central part of the new hybrid routine



Employee's Flexibility expectations

Attractive

Global 2022

Offering remote / hybrid working will be fundamental to retain the workforce in the future



66%

▲ 35-49 y : 75%

69%

In the long-term the employer will be expected to support remote/ hybrid work at home



63%

▲ Managers : 71%

66%

In the long-term the office will remain central to my working life



54%

▲ Caregivers : 64%
▲ Working Parents: 63%

60%

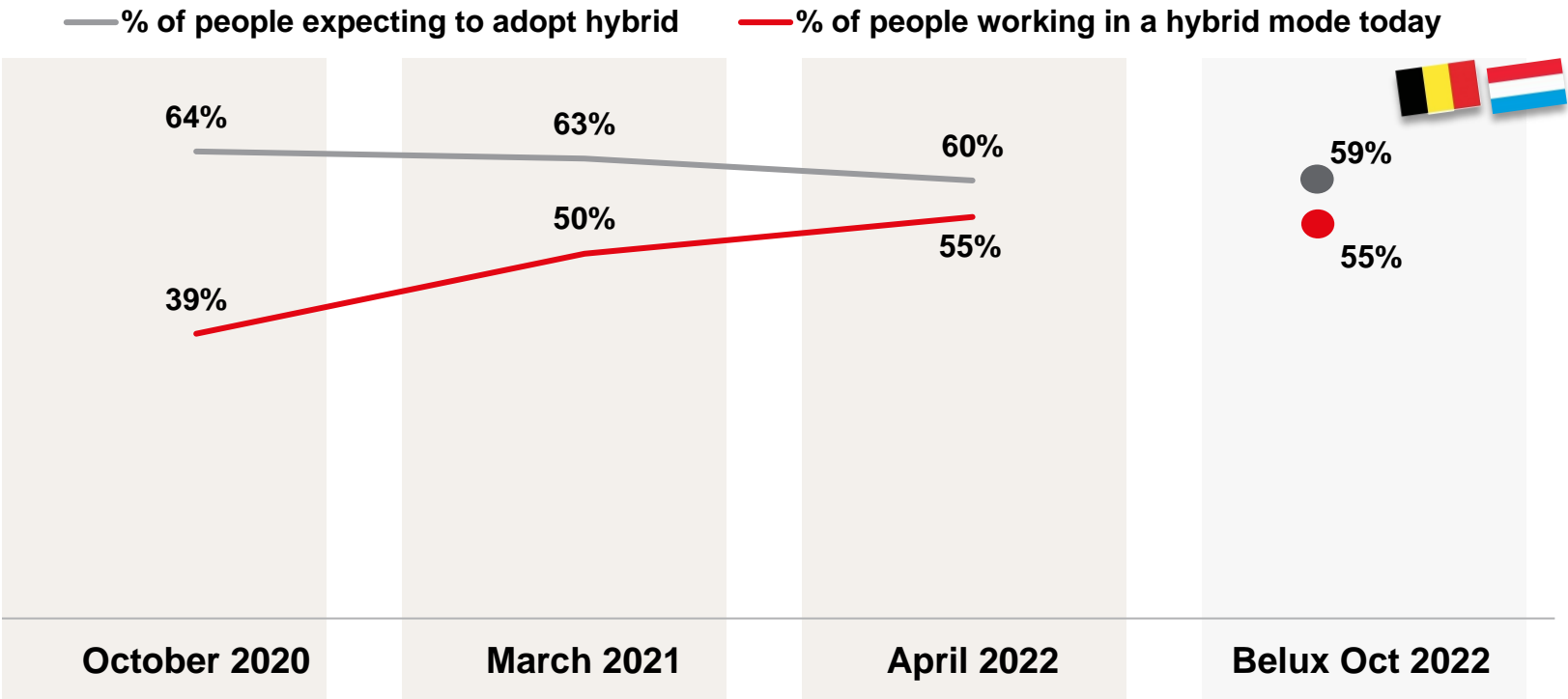
■ Don't know ■ Strongly disagree ■ Disagree
■ Neither ■ Agree ■ Strongly agree

Q. What is your opinion on remote / hybrid working for the future? To what extent do you agree with the following?

An optimal point is being reached: almost all office workers that aspire to work in a hybrid mode are doing so today



Hybrid Work: Expectations vs. Current practice



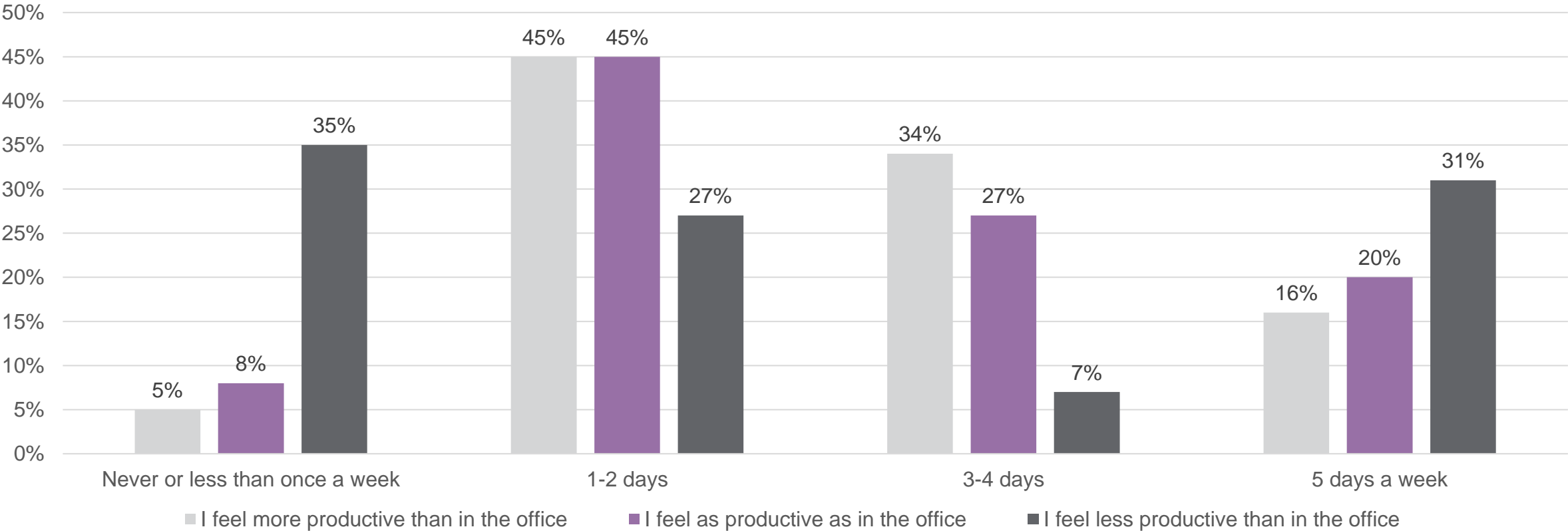
Q. How many days a week do you work remotely today and how many days do you expect to be doing in 12 months' time?

Productivity @home is a matter of balance

Maximised sense of productivity with 1 - 2 days maximum remote working per week maximum



The feeling of productivity when working remotely by the current remote work profile.



Key findings for Belgium and Luxembourg – Hybrid work



Hybrid work is the new normal for both countries, though there are some differences related to the specificities of Luxembourg:



- **Much less homeworking in Luxembourg** since covid measures were leaner than in Belgium. 49% of workers were exclusively in the offices at the time of survey (June), vs. 36% in Belgium.
- Expectations within 12 months are the same as vs. current situation.
- Working remote (home or third place) at least one day is favoured by 59% of Belgian respondents, but only 38% for Luxembourgers.
- **Working 1-2 days from home** is the ideal situation for 38% of Belgian respondents and 41% of Luxembourgers.
- “Never from home” is an option for 36% of Belgian respondents and for 52% of Luxembourg respondents.
- So, **hybrid work is dominant**: 59% (37% Office + Home, 13% Office + Home + Third Place, 7% Home + Third Place and 1% Office + Third Place).



Insight #2:

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



Currently, Belgians and Luxembourgers feel committed at work



41%

**Engaged,
committed to my
work and having a
sense of purpose**

Vs Global 45%

28%

**Empowered,
supported and
encouraged to
take initiatives**

Vs Global 39%

22%

**Enthusiastic
about all changes
taking place in the
world of work at
the moment**

Vs Global 36%

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

Remote workers have become used to their new homeworking routine & their feeling of being more productive at home keeps growing.

In Luxembourg, 80% of respondents do not feel more productive (vs. 53% in Belgium).

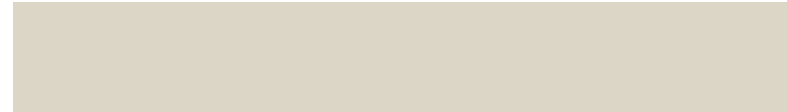


Sense of productivity in Homeworking

Comparison with March 2021



I feel more productive than in the office



47% +10pts

43%

I feel as productive as in the office

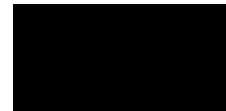


40%

-2pts

45%

I feel less productive than in the office



13%

-8pts

12%

Q. To what extent do you feel productive when working from home today?

However, human performance goes beyond the ability to deliver concentrated work



15%

employees today feel **isolated**, struggling to maintain close relationships with colleagues

Vs Global 25%

57%

regret the lack of **social interaction** when working remotely

Vs Global 50%

40%

regret the **common understanding and connections** made during face-to-face exchanges

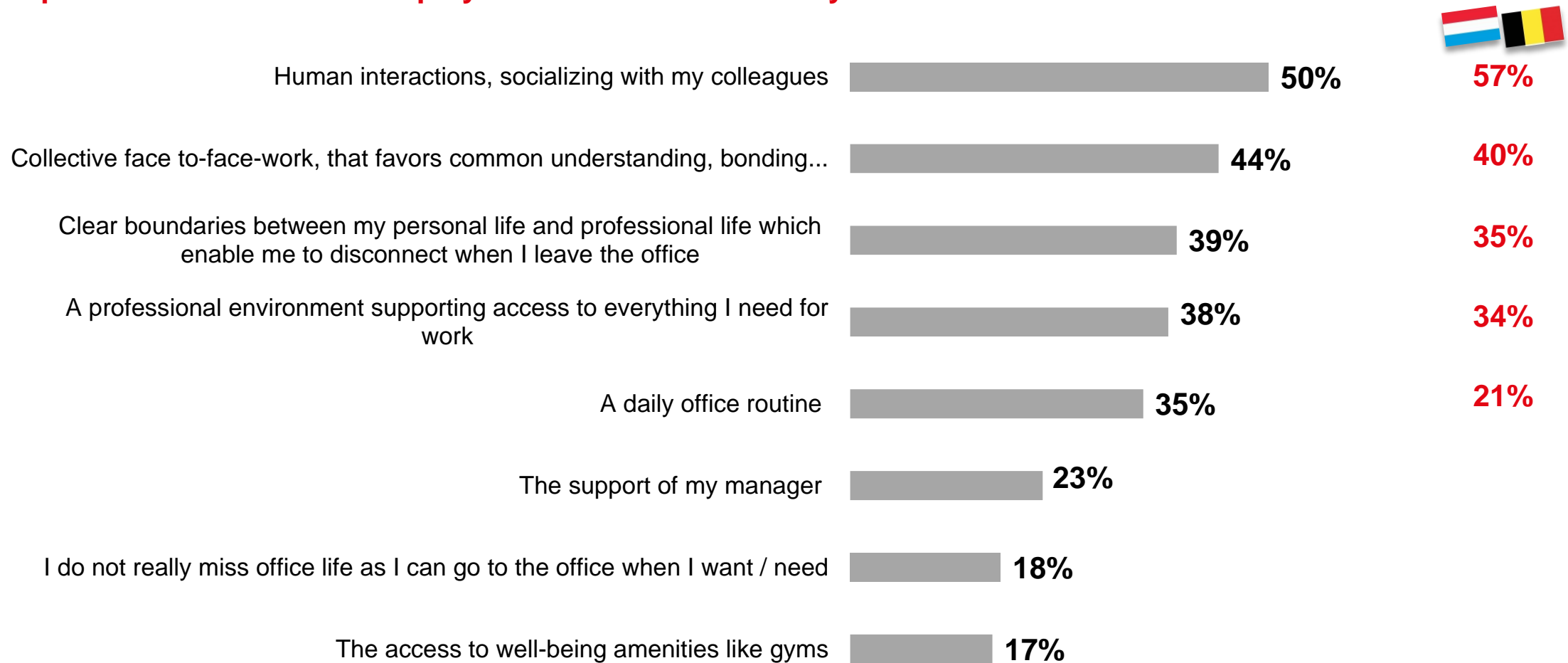
Vs Global 44%

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

Hybrid work poses a sustained risk in terms of the ability to create social value and unite the workforce around a shared purpose and vision



Aspects of office life that employees miss most when they are at a distance



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

Key findings for Belgium and Luxembourg – long term success of Hybrid work mode



- The **productivity is not affected by the hybrid work mode**, and we can assume that productivity could be increased on the long term if office work and homework is organized according to the tasks that need to be performed (collaboration or focused)
- The **office** remains the perfect place for collaboration, collective or face-to-face interactions and teamwork, the design of working spaces will have to take those factors into account to match the needs of office users.
- All hybrid workers are not on the same time schedule, so some workers will be in the office while to perform focused tasks or at home to hold meetings or hold meeting from the office with colleagues that are at home.
- The office will increase socialization and sense of belonging



Insight #3:

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

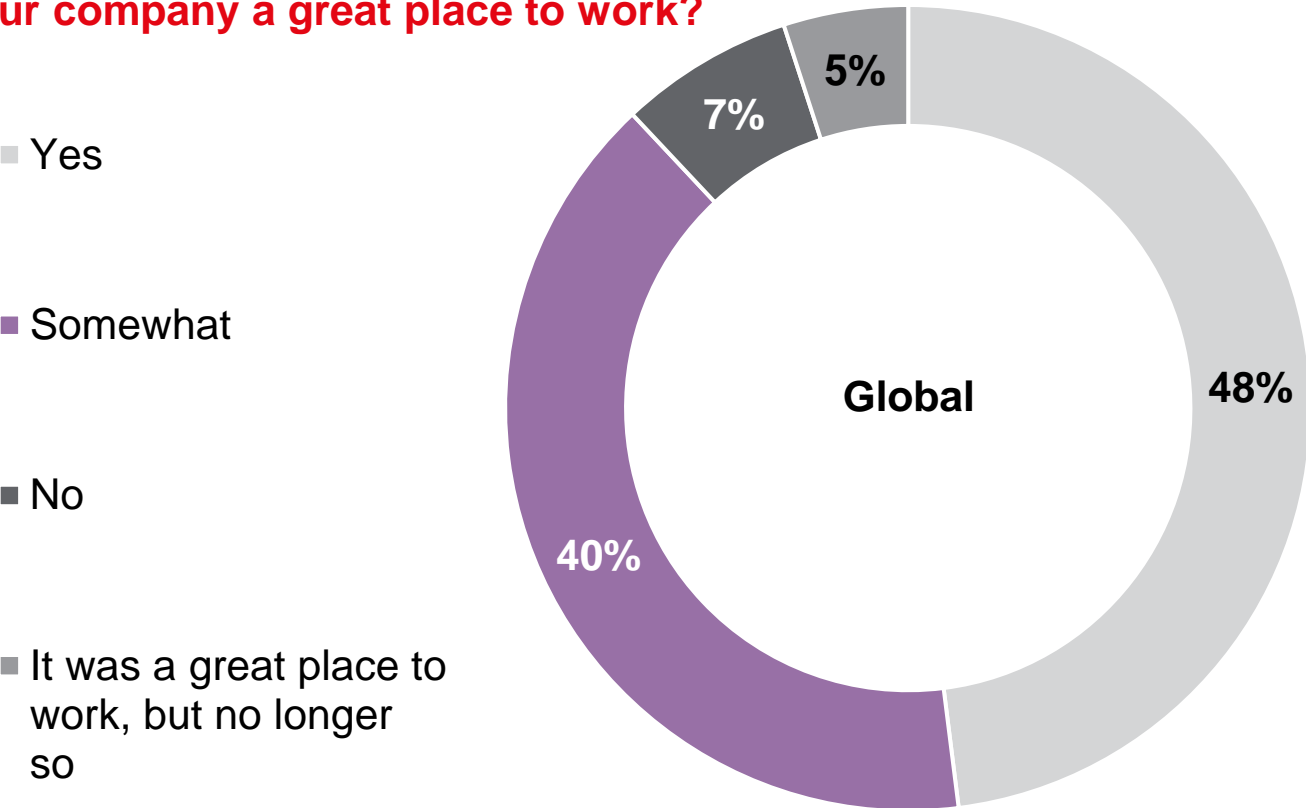



Only 48% of the workforce are convinced that their company is a great place to work today.


It is even lower in BeLux.




Is your company a great place to work?



 **39%** are convinced their company is great place to work today.

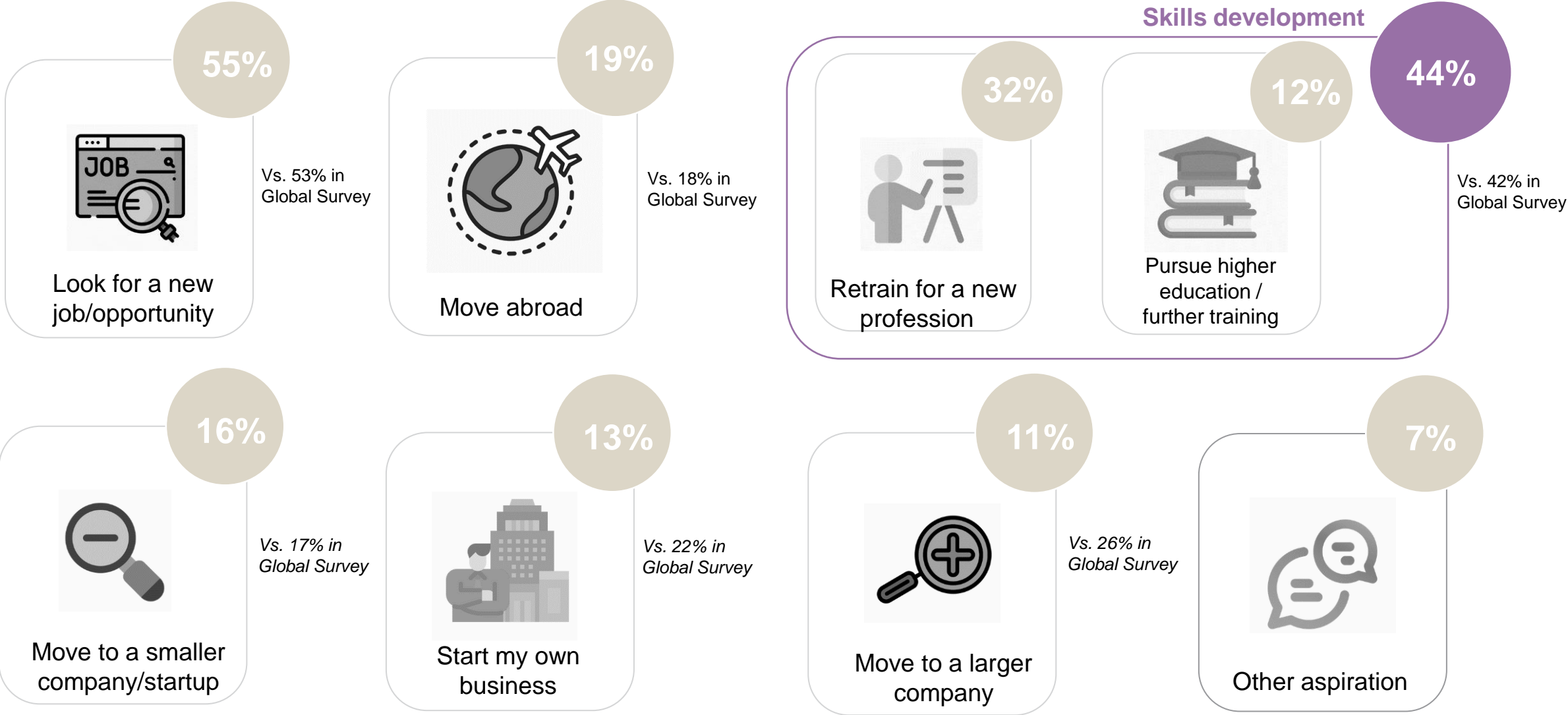
 **82%** are positive about their company (answers yes + somewhat)

 **18%** are disenchanted about their employer (answers No + used to be great)

69% plan to stay with their current job.
Only 14% in both countries consider leaving their company,
18% in Luxembourg.

Q. Do you think your company is a great place to work?

Employees would leave mainly to pursue better career opportunities and develop new skills, as seen in other countries



Q. What are your aspirations for your career move?

Caution: the bases being weak, the results must be read with caution

As in other countries, the wish to reach a better quality of life is the top reason that could lead to a move. Financial considerations follow.



Global 2022

Quality of life drivers

I want to improve my quality of life 50% 44%

I want more flexibility in my job 27% 30%

I have reconsidered the part that work plays in my life 30% 26%

Better package

I am looking for a better salary 44% 46%

I am looking for better rewards / a better package outside of my salary 38% 33%

ESG Drivers

My ethical values are no longer the same as those of my company 14% 16%

I want to work in a company with greater diversity and an inclusive culture 7% 13%

I feel I am not recognized by my current company 26% 24%

I want to develop new skills that my current position does not provide/require 24% 22%

I want to take on more responsibilities 14% 17%

I am looking for a new work environment 22% 13%

Other 3% 21%

5%

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

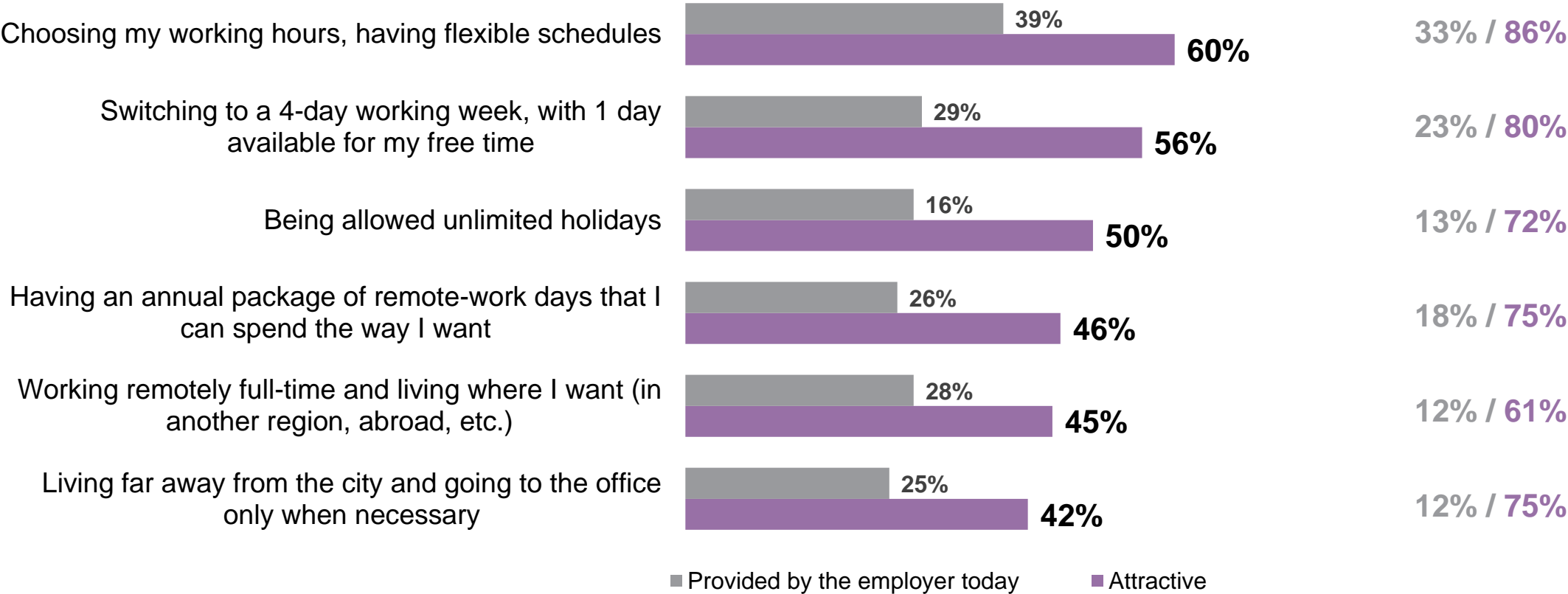
There is an opportunity for employers to support the new flexibility aspirations by going beyond simple homeworking arrangements



Flexibility Options: Attractiveness vs Current Practices



Provided / Attractive

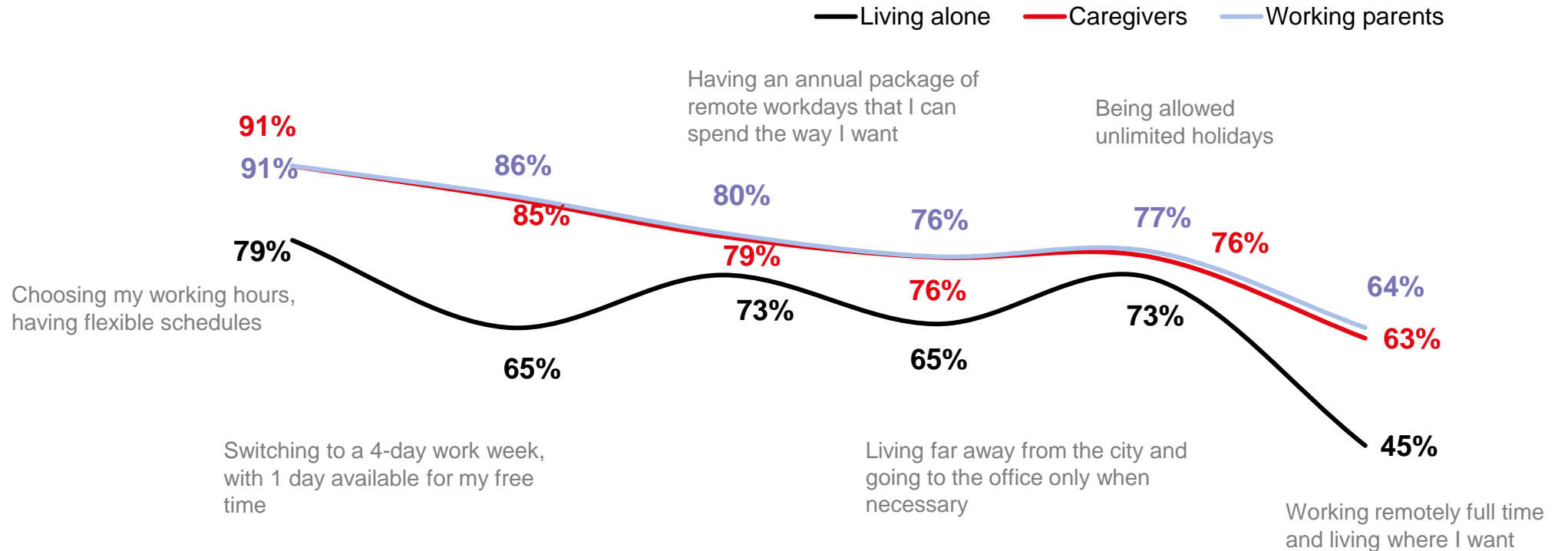


Q. How appealing are these flexibility options to you at the moment?

Caregivers and working parents are more attracted by the flexibility options as flexible working hours and the 4-day week



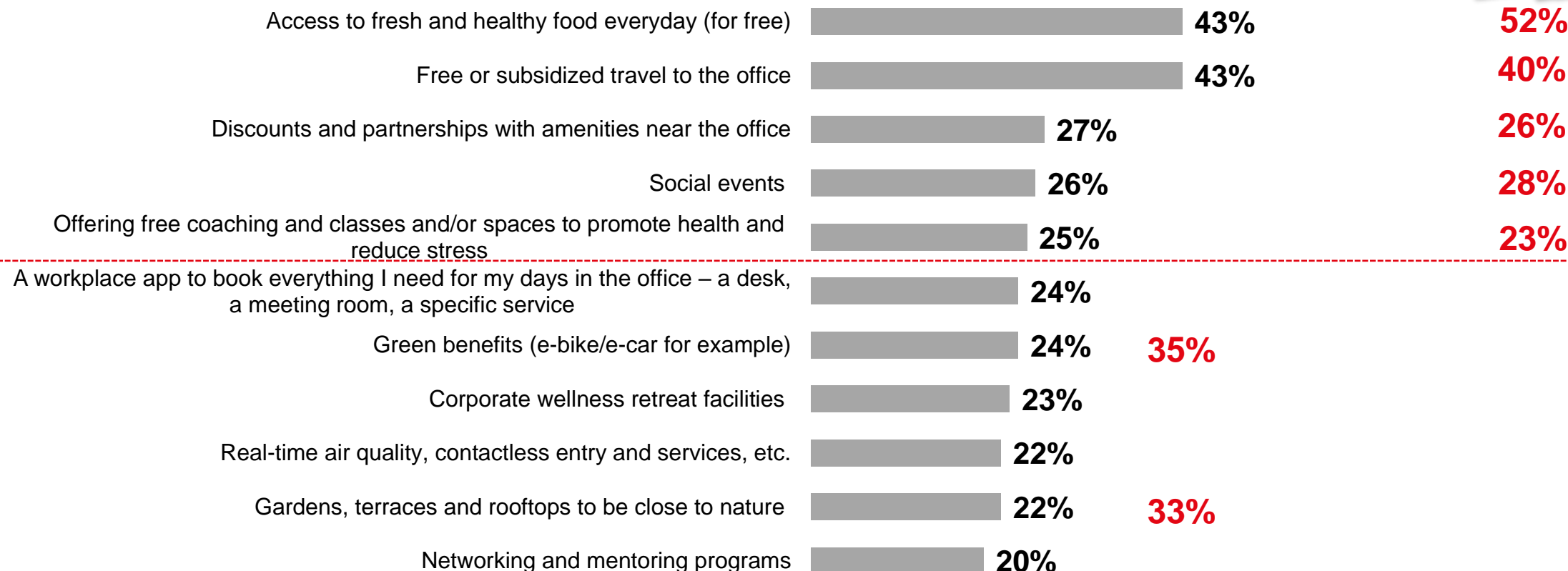
% APPEALING



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

Quality of life can also be improved in the office

Through very pragmatic initiatives like healthy food for free, free travel to the office, green spaces, etc.



Q. Which of the following prospects would make your office a more attractive destination?

Key findings for Belgium and Luxembourg

Employee Value Proposition re-invented



- **The vast majority of respondents think that their company is a good place to work, but only 39% think it is great. Very few intend to leave.**
Reasons to leave would be a better work life balance and / or a better financial package. Sustainability or ethics reasons are less important than in other places in the world.
- **Flexibility is highly demanded by both countries, not only in terms of working hours but also in terms of location.**
- The 4-days working week is attractive for both countries.
- Employees in Belgium and Luxembourg are looking for pragmatic initiatives improving quality of life. Free healthy food, green benefits (e-bike, etc.) or gardens, roof-tops and terraces are the most demanded. More Luxembourgers ask for green spaces than in Belgium (43% vs. 31%).



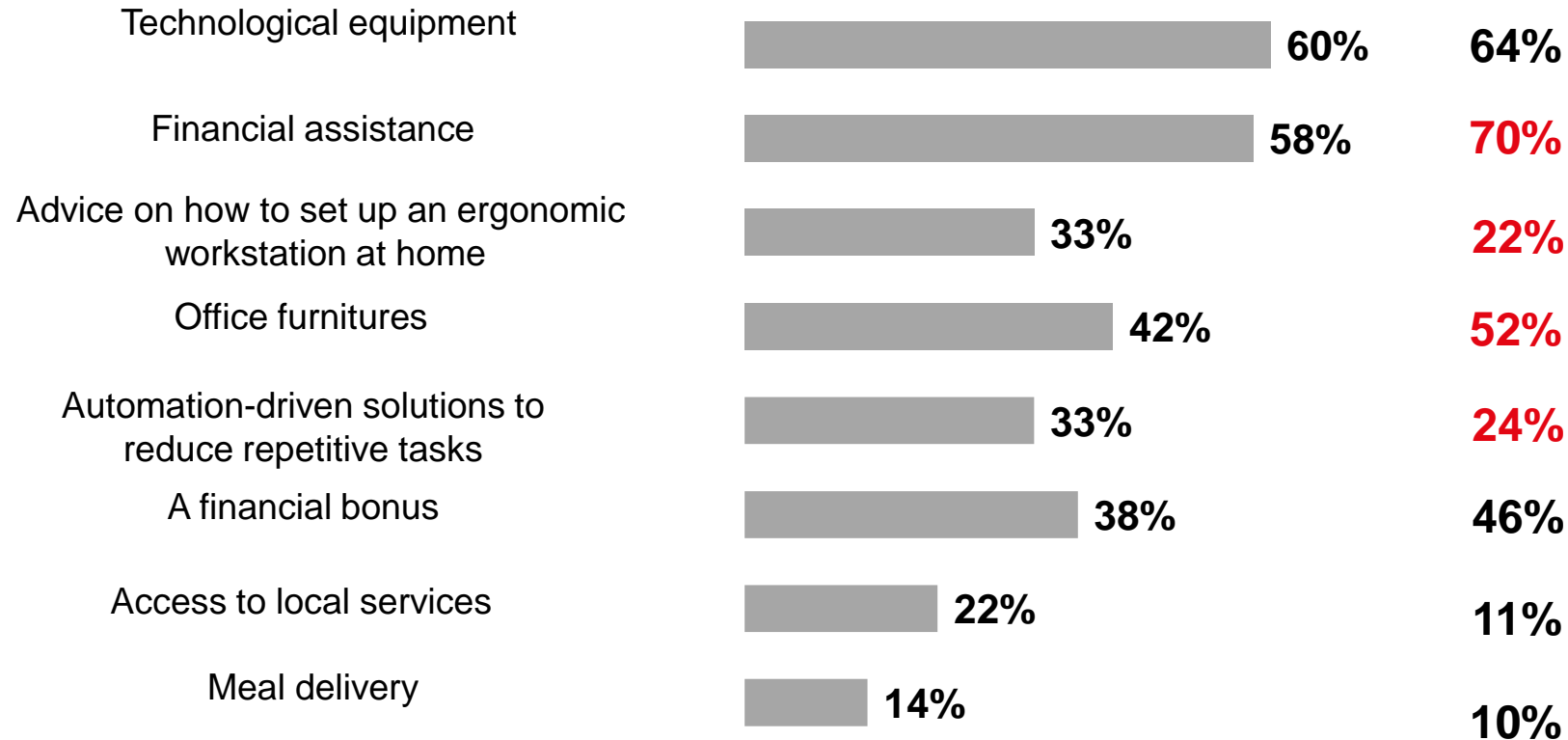
Insight #4: **The employer is expected to support hybrid work in many different ways**



The biggest gaps in terms of remote-work support are in financial assistance, tech equipment and office furniture.



Expected from their employer



Q. What kind of support does your employer already provide while working remotely?

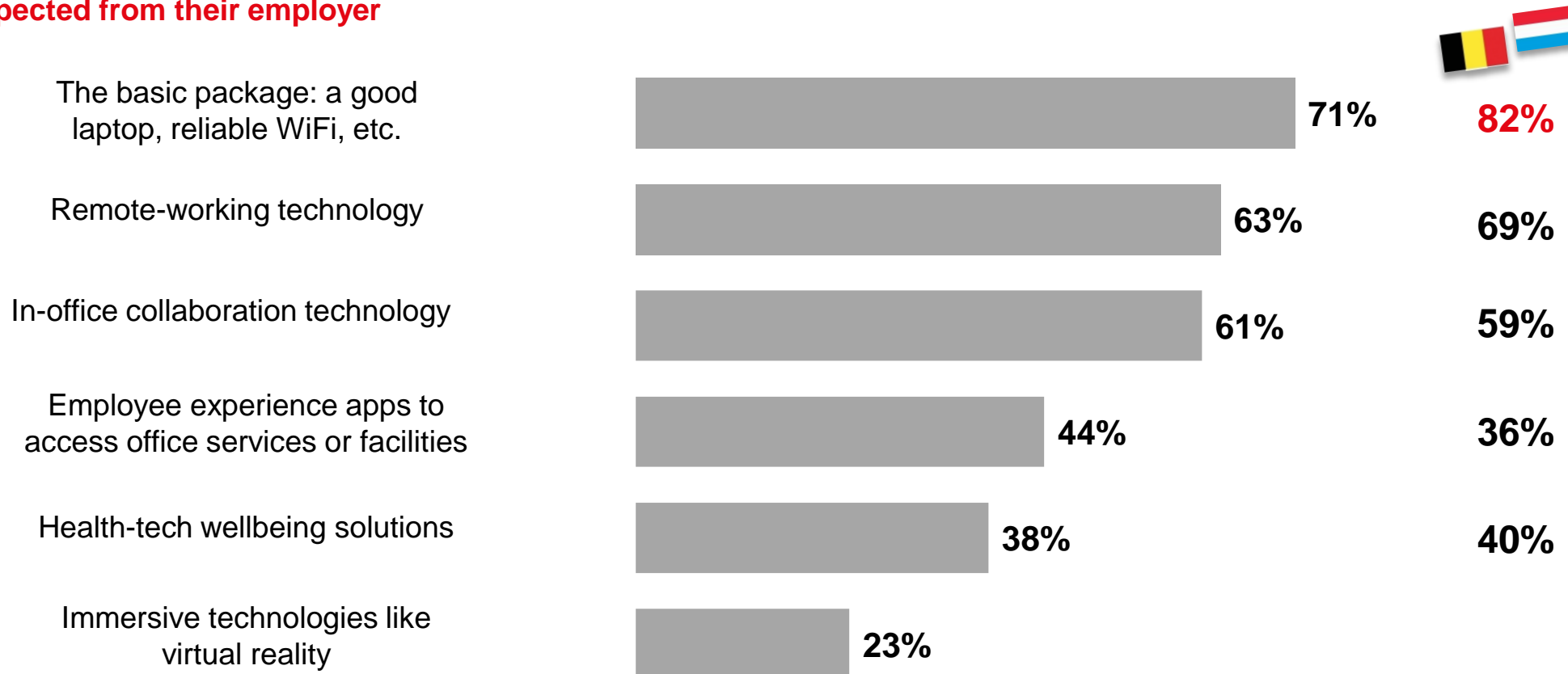
Q. What kind of support do you expect from your employer while working remotely?

In terms of technological support, providing the ‘basic package’ is where employers must focus their efforts.

Managers but also Gen Y are the most demanding groups



Expected from their employer



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

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

Key findings for Belgium and Luxembourg – Employer support



Technical and financial support are the most in demand

- **Technological equipment support is the most demanded in Luxembourg, and to a lesser extent in Belgium. 78% of Luxembourg respondents prioritize on this type of support, vs. 61% in Belgium.**

Indirectly, 70% of BeLux respondents favour financial assistance for expenses related to remote work - 72% in Belgium, 65% in Luxembourg.

- Office furniture are the third most important expected support from employers in Belgium. In Luxembourg it is 47%, vs. 42% globally.
- BeLux respondents have high expectations for the basic package provided.

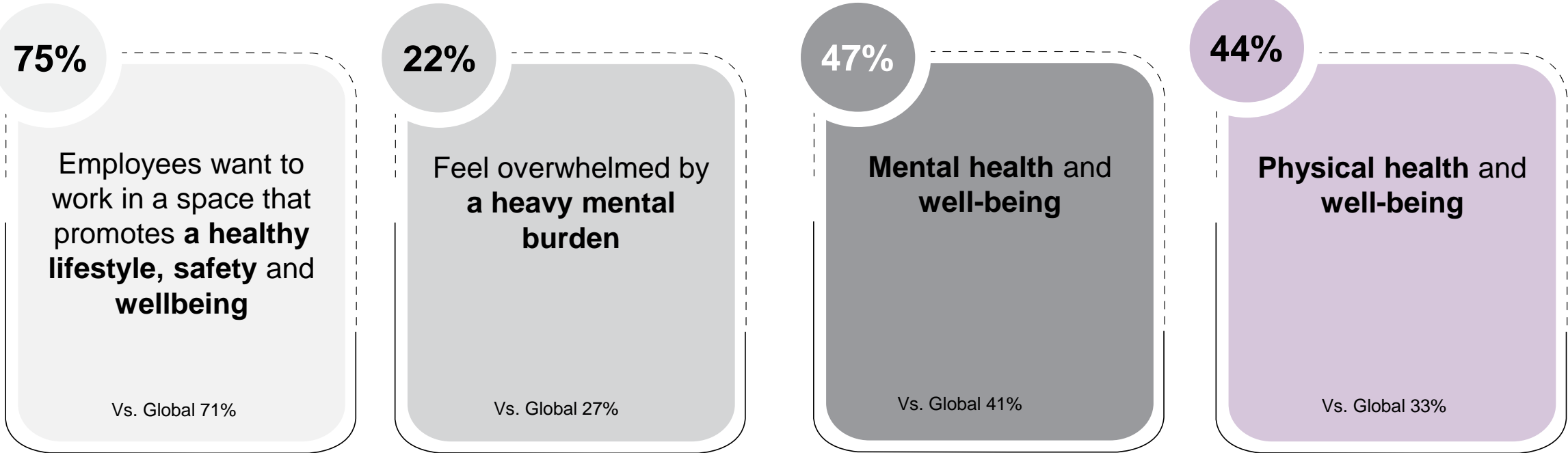


Insight #5:

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

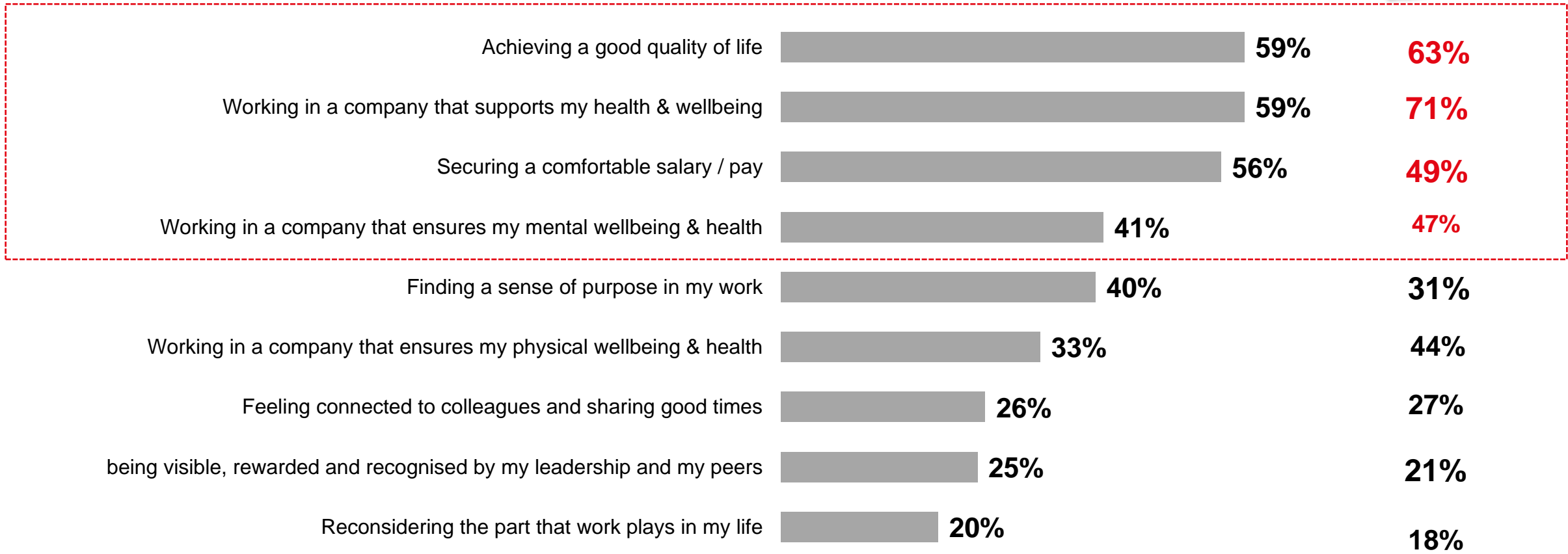


Focus on Health expectations



Health & wellbeing and quality of life: the priorities of employees' expectations

Even more than in other countries



Q. What are your priorities regarding your work today?

In terms of workplace, wellbeing is by far the main priority

Followed by environmental expectations, which are more important than for the rest of the world.



Q. With regards to the places where you would like to work, which are your most important expectations?

Workstyles have a direct impact on attitudes to work and the workplace



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**



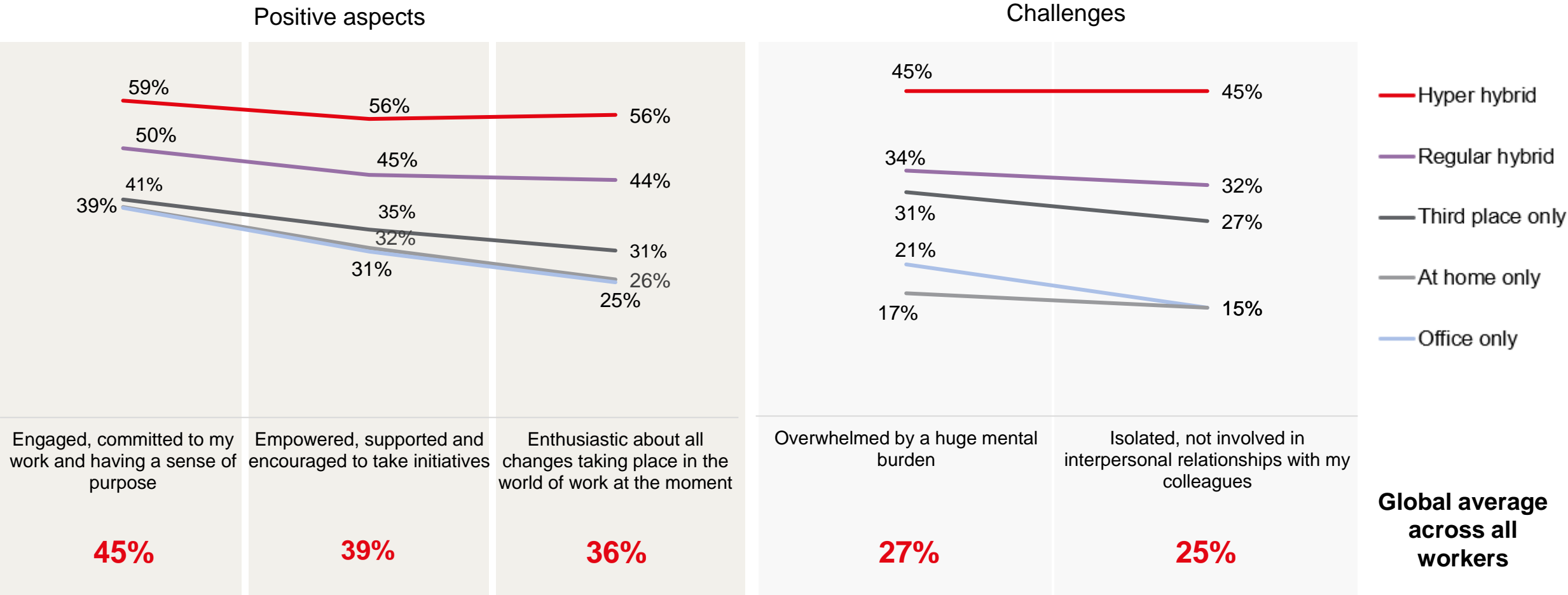
Home workers

- Are driven by **quality of life** and **pay**
- Expect **full flexibility in my 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**

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 both full of promises and challenges in terms of individuals' mental state.
 The most hybrid-oriented workers are also the most overwhelmed and stressed

Mental state by workstyle





Summary

Key trends Belux...





More than others, Luxembourgers and Belgians prioritise...

- A work life balance, spending more time with my family
- **61%** in Belux vs **56%** in the rest of the world
- The possibility to find purpose in your work
- **71% vs 40%**
- More than anywhere else they are working at the office 5 to 4 days a week - **41% vs 33%**
- Want to work in places that promote and healthy lifestyle, safety and wellbeing - **75% vs 71%**

In terms of work experience in the Belux region:

- Employees expected greater support in the future for expenses linked to hybrid work - **70% vs. 58%** - and a better technological equipment package - **64% vs. 60%**.
- Flexible schedules and choosing working hours - **86% vs. 91%** - or switching to a 4-day working week - **80% vs. 88%** - is also perceived as an advantage but still below global percentage.





Less than on other parts of the world in Belgium and Luxembourg

- Employees want to work full-time at home
- **14%** in Belux vs **27%** in the rest of the world
- Consider their company as a great place to work - **39% vs 48%**
- Wish to work from third party locations - **24% vs 40%**

Luxembourgian and Belgian mood

- Engaged, committed to work and having a sense of purpose
- **74% vs. 74%**
- Empowered, supported and encouraged to take initiatives
- **67% vs. 68%**
- Enthusiastic about changes taking place in the world of work at the moment - **22% vs. 64%**





Thank you

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