



*Achieve
Ambitions*

Workplace

Powered by Human Experience

A *global* perspective



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Workplace

Powered by Human Experience

A place of work is far more than a property. It is a living environment that helps individuals and businesses craft and experience a better fusion of life and work.

Memorable experiences are a key differentiator for individuals as they engage with an organization. This creative thinking should be at the core of every strategic and operational action in every company.



Workplace

Powered by Human Experience



A workplace that is powered by the human experience goes beyond a work-life balance. It drives how people feel about their place of work. How empowered, engaged and fulfilled they are, it's the purposeful fusion of life and work based on authentic human experiences.

Dr Marie Puybaraud

Global Head of Research, JLL Corporate Solutions

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Dr. Marie Puybaraud is a thought leader and expert on Corporate Real Estate and workplace and the future of work, with a significant track record producing CRE research on workplace innovation and facilities management and how they impact the world of real estate. As the Global Head of Research for JLL Corporate Solutions, she works in collaboration with JLL clients to drive research and innovation. Her writing regularly appears in the international press, and she frequently presents at major global summits.

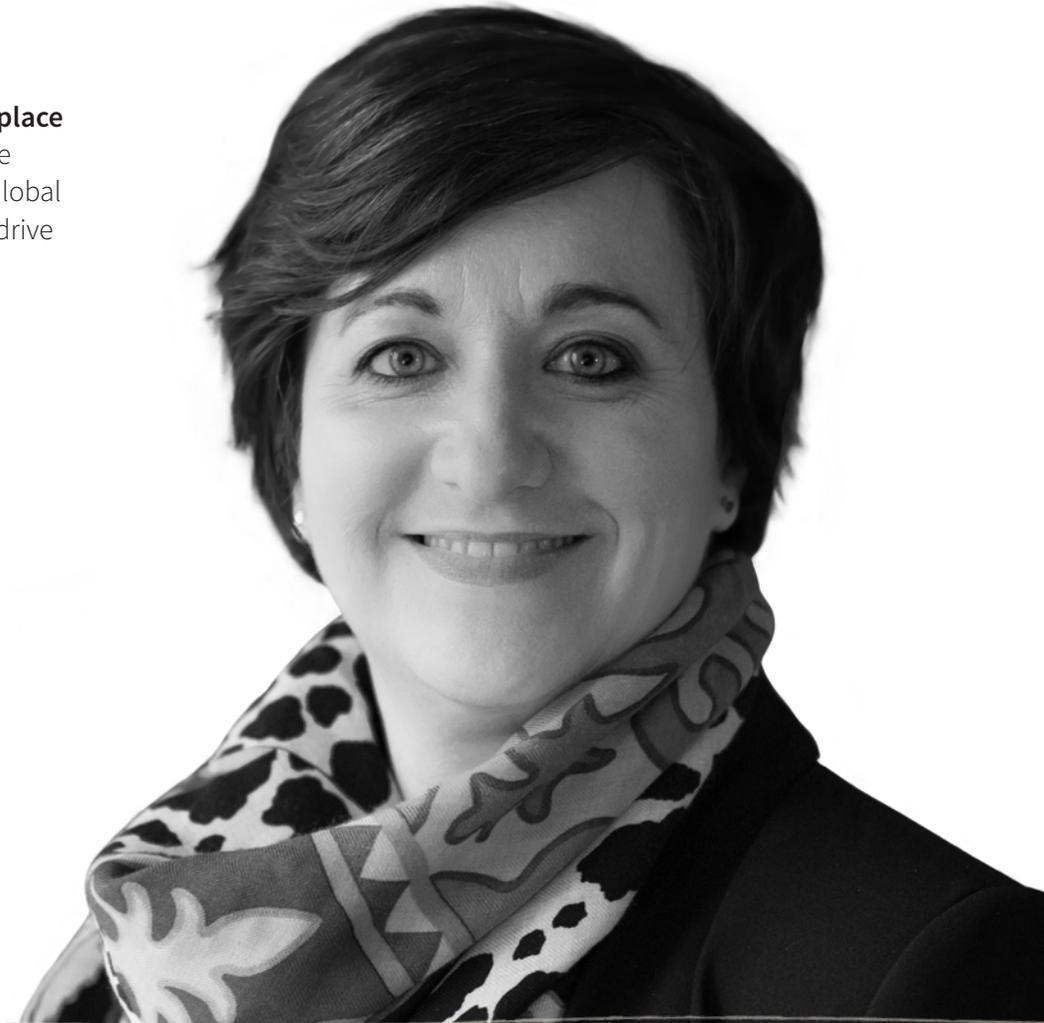
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Major Research Projects

- Workplace, Reworked (2016)
- Top Ten Trends in CRE (2016)
- Urban Canvas, TEDX Sydney (2016)
- Smart Workplace 2040 (2015)
- Digitization of FM – FM 4.0 (2015)
- Sustainable for All – Creating a greener workplace for the multi-generational workforce (2013)
- Smart Workplace 2030 (2012)
- Digital Natives – Born to be Connected (2012)
- Collaboration 2020 (2011)
- Oxygenz – Generations & the Workplace (2010)

Books / Chapters

- TD Bank Retail Future (2014) US
- Vision 2030 (2012) GER
- The Dreams of the Office (2009) JPN
- La Fabrication de la Ville (2009) FRA
- Managing Business Support Services (2002) UK



Major publications

G8 Summit Report, Work Design Magazine, Office and Culture, The Leader, WIWOM, Journal of CRE, The Economist, New Statesman, The Financial Times, Le Monde, Le Figaro, BBC News online, The Daily Telegraph, Il Sore 24, Handesblatt etc.

Introduction

Powered by Human Experience

Think of a great app.

You can perform your desired task quickly and efficiently, and you feel good about the brand supplying it. A bad app has the opposite effect – the task is hard to do, takes too much time and energy, and the experience is not rewarding in any way.

The workplace is no different. It creates experiences that both affect our ability to get things done and shape our impressions and memorable moments of an organization.

Savvy C-Suites today see a direct correlation between productive places of work and healthy balance sheets. It is no longer enough for leaders to focus solely on improving visual appeal in the quest for greater productivity and profit. Real estate is a strategic device and, used wisely, it can help businesses of all sizes to attract, nurture and retain talent.

In recent years, this increased focus on talent and productivity has contributed to a growing emphasis on employee experience. It starts with employees finding and applying for a job at the organization and ceases when they eventually leave and share a memorable moment.

Organizations must provide the very best human experience in order to:

- Embody an organization's culture, values and missions
- Influence employees' attitude towards their work and their employer
- Shape brand perceptions internally and externally

Our global research project

JLL carried out a unique global research project: to decode the workplace experience, understand its specific impact on business performance and work out how experiences can be shaped by real estate to achieve strategic performance objectives.

7,364 Employees

40 Corporate Clients

12 Countries

3 Regions

Our findings

Through this research project, we set out to demonstrate how transformational experiences could:

- **Impact employee engagement, empowerment and fulfillment in the workplace**
- **Cement the link to professional happiness and satisfaction**
- **Impact productivity and quality of life**

Through this survey, we have identified key workplace features that directly affect experience, including:

- **New types of spaces**
- **Alternative work philosophies**
- **Different managerial approaches**

These features can positively impact the impression an organization leaves on its employees and visitors and provide a better quality of life for employees and improve the efficiency of collaborators. Regardless of whether these experiences involve enhanced technology, innovative products, or collaboration with people, these experiences must make a good impression and could deliver engaging, empowering and fulfilling experiences.

Human Experience Model

In this report we present our **Human Experience Model**, which we have developed from the outcomes of our extensive research project.

The model can help you shape optimal user experiences to create value for your employees, customers, colleagues, visitors, stakeholders and your brand.

Our global research project

Methodology

Desk Research

to gather all relevant academic content on user experience

- Identify relevant publications
- Define experience
- Identify what creates an experience in a workplace setting

Survey

to decode user experience

- 7,364 employees
- 12 countries

Co-design

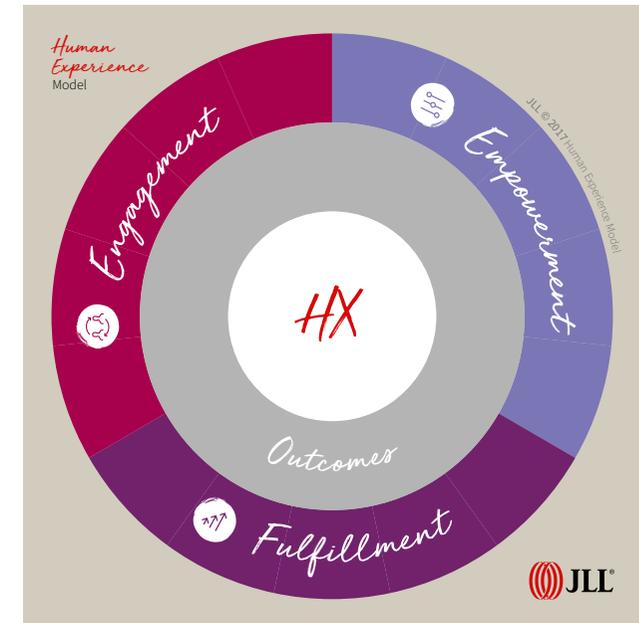
to co-create a Human Experience Model with clients and experts

- 9 workshops
- 40+ corporate clients and experts

Output

- Global Report
- 12 Country Reports
- Guide
- Human Experience Model
- Diagnostic Tool

Product



Executive Summary

Recommendations for CRE

“

As workplace strategy moves from practical, design-based decision-making to a more experience-led approach, expect an overlap with functions that have traditionally been the domain of HR teams.

This will impact workspace design and decision-making.

Dr Marie Puybaraud

Global Head of Research, JLL Corporate Solutions



Engagement must come first

- Introducing innovative workspaces will drive engagement
- Use workspace to foster an entrepreneurial spirit to attract and retain employees
- Consider adjusting workplace density to improve employee effectiveness
- Formalize human experience in the organizational structure



Empowerment will drive change

- Trust, kindness and taking initiatives — the top three work philosophies — will empower employees
- Agility — choice to work elsewhere will improve performance and quality of life
- Employees appreciate space for concentration, regeneration and movement



Fulfillment is the new happiness

- Happiness is the number one priority for a positive workplace experience
- Companies must consider spaces dedicated to health and well-being
- Managerial approaches linked to recognition and personal learning and development also impact employee fulfillment

Key Findings

Human experience in real estate is a key differentiator for how end users interact with an organization and should therefore play a key role – both strategically and operationally to drive engagement, empowerment and fulfillment.

Human experience is a key differentiator for how people engage with an organization

Human experience is driven through Engagement, Empowerment and Fulfillment

Experiences help individuals and companies to align and advance their ambitions

Culture and values are crucial to drive the means of engagement

Health and well-being must be ingrained into the vision of the organization

Workplaces must provide a broader range of innovative spaces to meet employee expectations and attract and retain talents

Spaces dedicated to collaboration and teamwork have the strongest impact on productivity

Large companies are urged to foster an entrepreneurial culture

Effectiveness is linked to workplace density

A Chief Happiness Officer should be fully devoted to employee well-being

Work-life balance differs greatly around the world

Agility improves performance

Employee's commitment is driven by trust and kindness

Innovative workspaces drive engagement and boost the quality of life at work

Engagement: fosters a sense of commitment

Participants in the US, India and China — far more than other countries in the survey — felt positive about their workplaces and expressed a high level of engagement. There is conflict, however, between those who commit to corporate values, and cultures and have a corporate stance and respondents who are more innovative and advocate challenge and ambition, and they participate in the company's success.

Empowerment and agility: readiness for change

Our research showed that while employees are ready to embrace change and contemplate an agile way of working (with India, China, Italy and US leading the pack), maintaining their personal comfort remains a priority (especially for Germany, France, Japan and Australia). Employees do express a yearning for innovation but not at all costs. They are not all ready (24% are not ready at all) to switch from their current workspace to open-plan offices or unallocated desks.

Entrepreneurism: a new generation of talent

To meet future employees' expectations, large companies are urged to foster an entrepreneurial culture. Start-ups may not yet have replaced large companies in the hearts of employees — large corporations still attract more employees than the smallest ones — but an entrepreneurial spirit is a significant differentiator when it comes to attracting and retaining a new generation of talent.

Staff commitment to their organization (by country)

Pride
US, FRA, AUS

Belonging
GER, NL

Dedication
JPN

Active collaboration
ESP, ITA, IND

Challenge
CH, SA

Fulfillment
UK, HK

Fulfillment: the new happiness

Respondents in all countries agree that people seek happiness in their place of work (69%), even more so in Australia, Germany, South Africa, Hong Kong and France. Other workplace experiences that scored highly include recognition (60%), personal learning (54%) and creativity (53%).

Companies around the world should consider a role specifically dedicated to the happiness and well-being of employees. Eighty-seven percent of the respondents felt it would be a good idea to appoint a Chief Happiness Officer; someone dedicated full-time to employees' well-being and experience in the workplace. Respondents in China, Hong Kong, India, Spain and Italy were most keen on this idea; the Dutch and Australian were the least enthusiastic.

Trust and kindness: the right managerial behaviours

Forty percent of all respondents globally reported feeling very engaged and committed, revealing their desire to share knowledge and grow within their organization, to excel at their job and their pride of belonging to their organization. Trust and kindness were perceived to drive engagement. Kindness in the workplace is attributed to managerial behavior; the care given to employees breeds a sense of belonging as does giving permission to breathe and to develop in the workplace.

Innovative work spaces: concentration, regeneration and movement

Workplaces must provide a broader range of innovative spaces in order to both meet employees expectations and attract and retain talent. Employees who feel both part of a community and cared for as individuals feel more engaged. Our research found that to help them cope with work pressures, respondents wanted non-traditional spaces for concentration (47%), getting their energy back (40%) and for helping them get away from their desks (39%), including :

- Spaces for contemplation
- Community-focused spaces
- Health-based environments
- Family-dedicated environments
- Healthy and controlled places for getting together
- Collaborative and experimental spaces

Decoding Human Experience

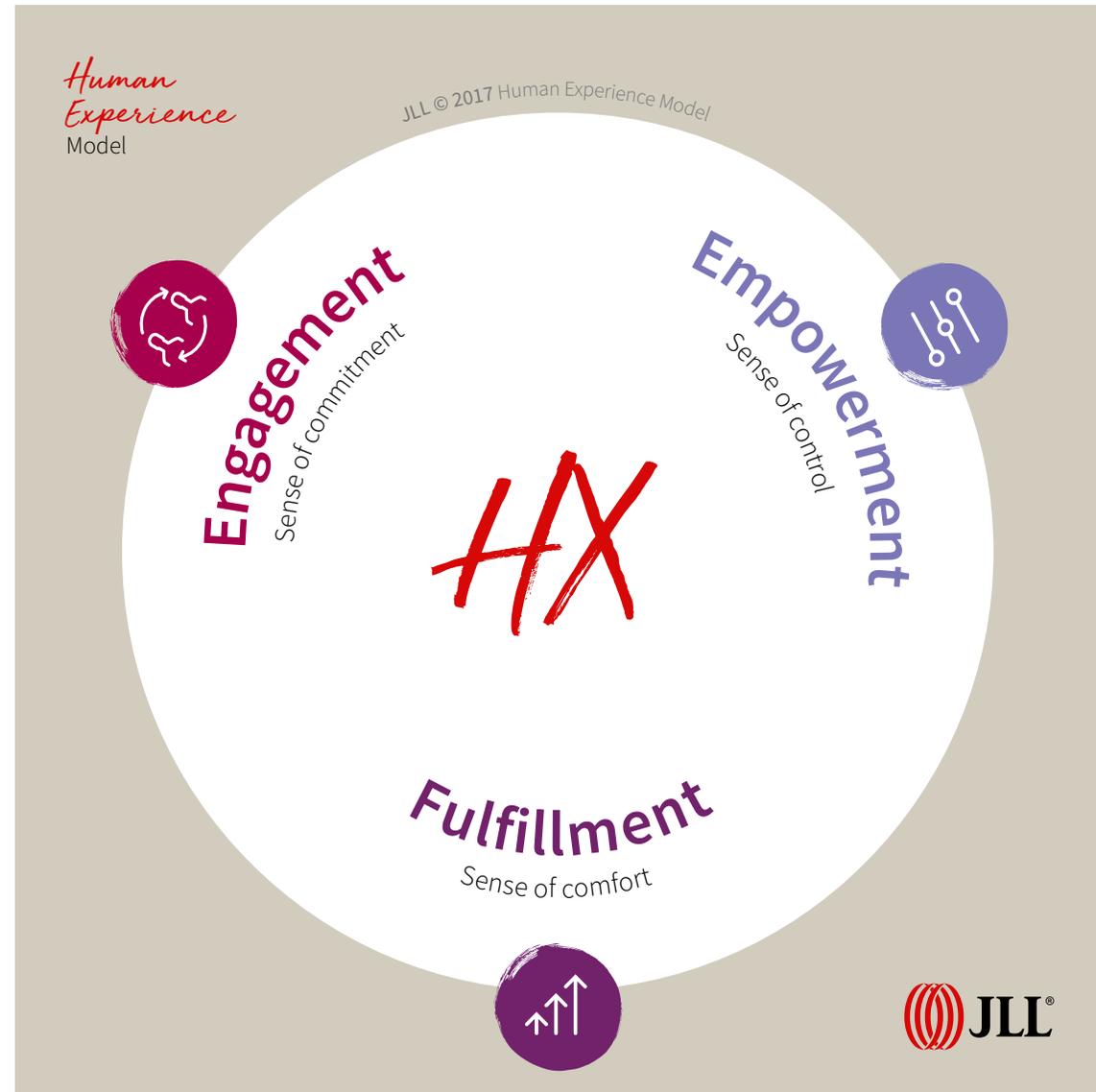
Our definition of Human Experience

Human Experience is an impression an organization leaves on its people, beyond the physical environment, which results in greater engagement, professional empowerment and a sense of fulfillment.

Understanding human experience for real estate is a key differentiator for how people engage with an organization. Similar to customer experience, employee experience involves how an individual interacts with his or her environment (physical, virtual and even spiritual) and their peers.

The **Human Experience Model (HX)** decodes experience through three pillars: engagement, empowerment and fulfillment.

The HX model can help you shape optimal user experiences through real estate to create value for your employees, customers, colleagues, visitors, stakeholders and your brand.



Three priorities to drive experience

Experiences help companies and individuals achieve their ambitions. The results of our research project have pinpointed three priorities to drive human experience for corporate occupiers.



Engagement

Fostering a sense of commitment, which drives employees' performance and effectiveness. It is an essential ingredient for facilitating organizational change. At work, people need to feel they have a purpose and operate in a nurturing environment in a business that allows them to prioritize their personal as well as professional development.



Empowerment

Giving people a sense of control in their working environment and this can drive performance. Space to breathe, create and collaborate — alongside sustained opportunities for learning and excelling at work — and enable organizations to build trust and transparency in the workplace, key ingredients for boosting performance and ensuring people have a sense of purpose at work.



Fulfillment

Making sure work feels comfortable beyond the surface level of happiness. Employee health needs to be ingrained into the vision of the organization, and creating positive experiences in the workplace will require companies to rethink their real estate and strategic direction. This should be balanced with rewards and recognition that boost belonging and satisfaction.

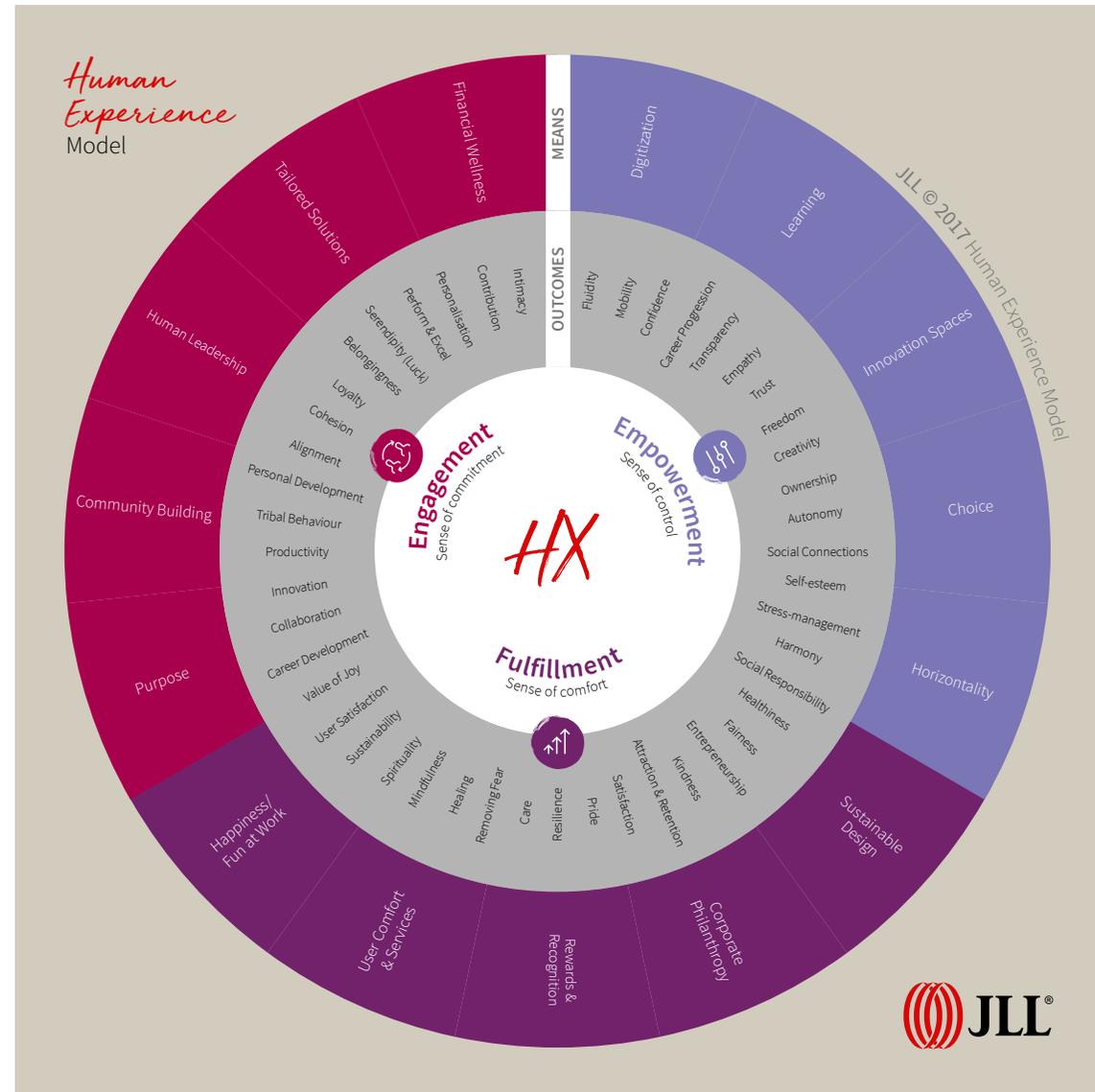
We decoded the human experience around these three priorities.

Use it to create value for your customers, employees, colleagues, visitors, stakeholders and your brand.

Introducing the Human Experience Model

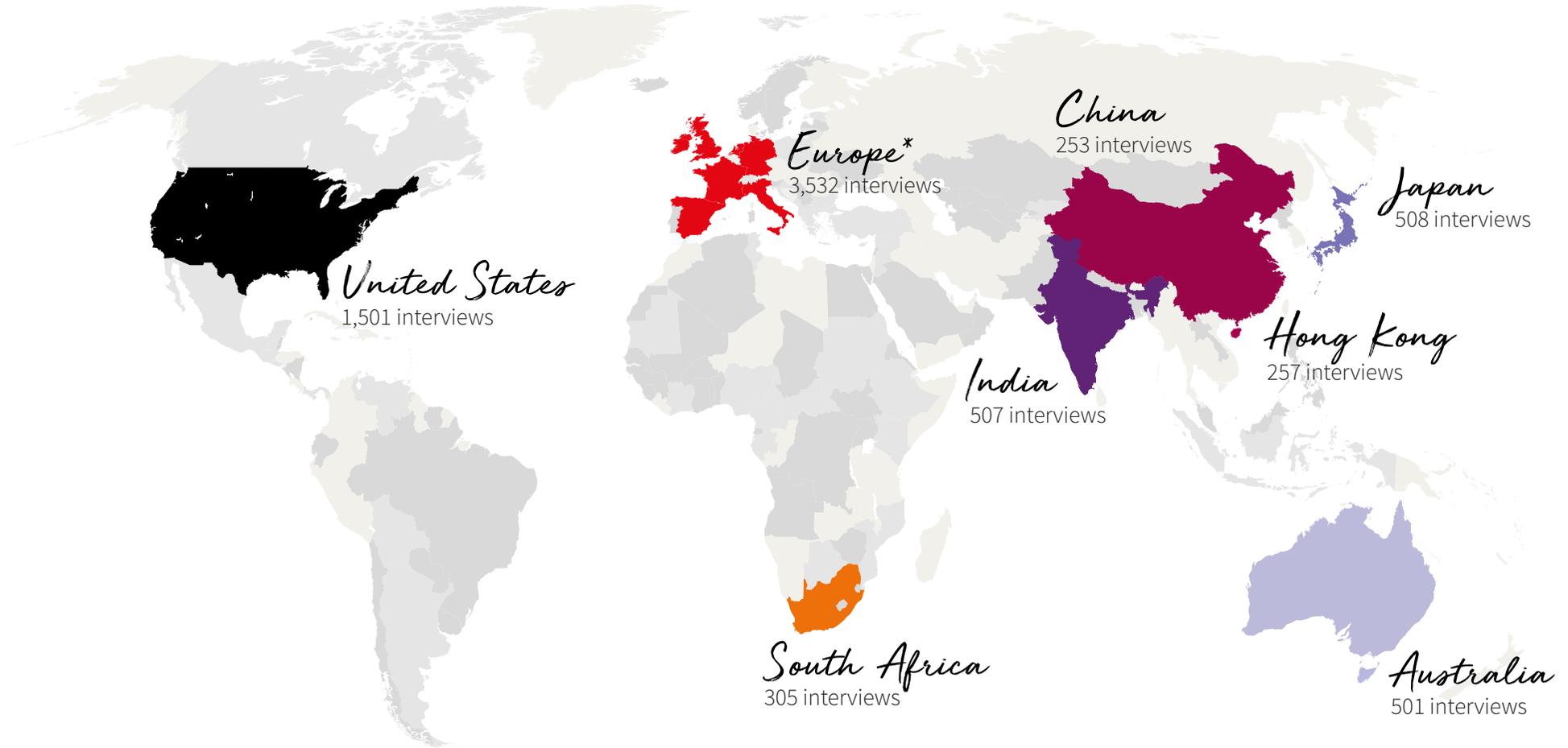
This research has helped us to develop a unique tool to help organizations define, measure and implement their experiential priorities. Built around the three pillars — engagement, empowerment and fulfillment — the HX tool can help organizations of all sizes to help balance the responsibilities of work and life.

The HX model is rooted in in-depth data and analysis, which can be tailored to an organization’s specific aims.



Survey & Results

Global respondents



7,364
Respondents

12
Countries

*Europe breakdown

UK 505 interviews	GER 506 interviews	ITA 507 interviews
NL 508 interviews	FRA 1,003 interviews	ESP 503 interviews

How people work around the world



92%

of our respondents work full time and 79% in a company with more than 250 employees and 43% in organizations of more than 1000 employees.

63%

globally report never working on public transport or in a hotel.

54%

of respondents globally work at home at least once a month. India, China and the US lead the trend (above 60%).

66%

of the time in the company is spent at their desk:

- EMEA employees are the most static
- US workers are the highest users of meeting spaces (formal and informal)

How people work today



71%

of employees occupying a workstation in an open-plan office share it with at least 10 people (25% house more than 50 people)

- APAC offices are the most densely occupied
- EMEA offices offer smaller open spaces (with fewer than 30 people)

34%

work at least once a month from third places such as internet cafés, public libraries or co-working spaces:

- The younger generation leads the trend (47% of under-35s against 27% of over-35s)
- Men more frequently than women
- Managers more than other employees
- More in China (58%), the US (49%) and India (48%)

55%

occupy a single or shared office of up to six people, and 40% have a workstation in an open-plan office while only 5% have an unallocated desk

- APAC countries most frequently use workstations (50%)
- Employees in EMEA use enclosed, shared offices (33%) more than anywhere else

45%

of respondents globally work at least once a month at a client or partner site:

- This habit is the most spread in the US (54%)
- The least work in EMEA (42%)
- APAC employees are in-between (48%)

How workspaces impact effectiveness

Delving into the results further, we begin to see not only how people work but how their place of work affects their ability to perform tasks effectively.



Trust, taking initiatives and kindness are the work philosophies perceived as the most powerful engagement levers:

- Companies with fewer than 100 employees do not promote kindness as much as companies with more than 100 employees

Spaces dedicated to collaboration and teamwork have the strongest impact on productivity:

- Particularly in the US and Asia
- Among managers
- Among employees under 35

Communal spaces have the strongest impact on quality of life and engagement, particularly for:

- Millennials
- Managers
- Sites with 500-1000 employees
- Employees under the age of 35

How workspaces impact effectiveness

51%

agree that their workspace allows them to work very effectively, particularly for:

- India (74%) and the US (71%)
- Millennials (66%)
- Men (53%) more than women (50%)

40%

report that they currently feel very engaged at work:

- Managers are typically more engaged at work than those without a managerial responsibility
- Europeans are the least engaged

Types of workspace today

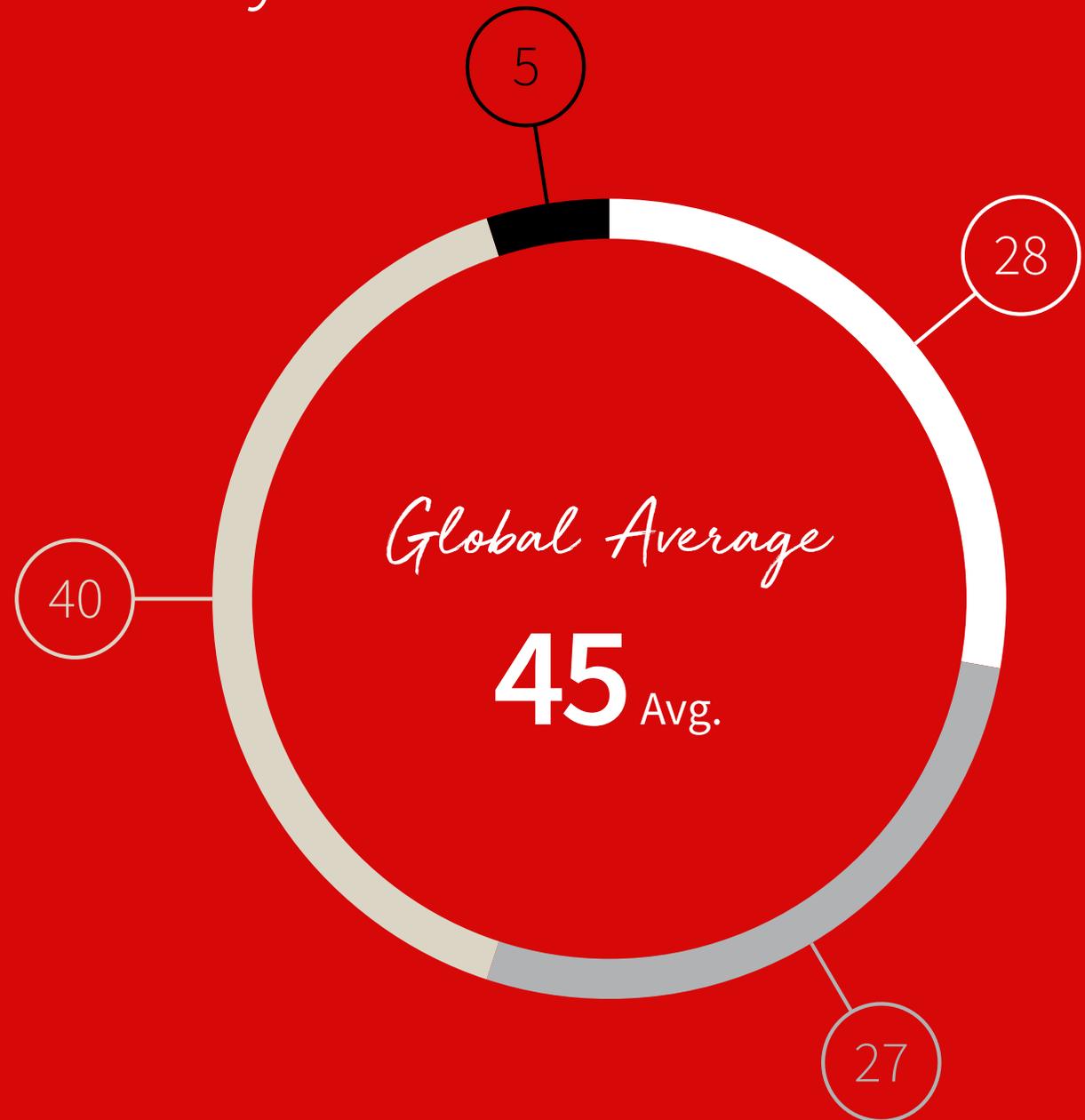
We asked:

What type of office do you work in?

How many people do you share this space with?

Base: 7,364 respondents

- Percentage of enclosed single office
- Percentage of enclosed shared office (≤ 6 people)
- Percentage of workstation in an open-space office (+6 people)
- Percentage of unallocated workstation
- 00 Average number of people in the open space



Types of workspace today

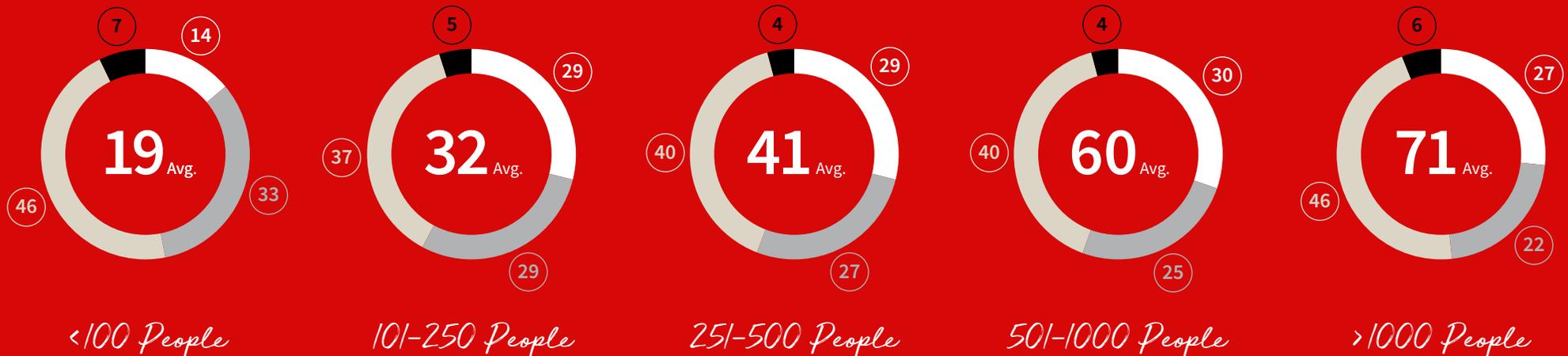
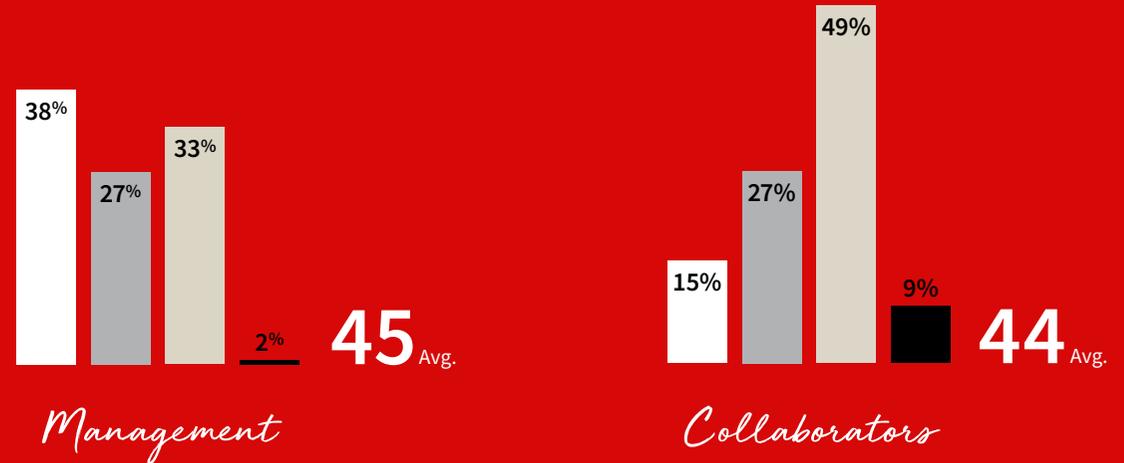
We asked:

What type of office do you work in?

How many people do you share this space with? (per company size and managerial level)

Base: 7,364 respondents

- Percentage of enclosed single office
- Percentage of enclosed shared office (≤ 6 people)
- Percentage of workstation in an open-space office (+6 people)
- Percentage of unallocated workstation
- 00 Average number of people in the open space



How workplace quality impacts effectiveness

Enclosed offices (single or shared) dominate in workplace design across the countries surveyed. Open-plan offices and spaces that promote hot-desking are less frequently found. Home-working and spending time at partner or client sites are the main alternative workplaces for employees.

Ambient temperature and adequate facilities aside, both of which are well-documented examples of factors that effect employee effectiveness, this research has pinpointed a **relationship between workspace density and employee effectiveness.**

While 55% of office space is still dedicated to enclosed offices, either shared or with a single occupant, there is a strong appetite to embrace agile working (but not at all costs). On average, 40% of space globally is allocated to workstations in an open-plan layout, while only 5% of space, on average, houses unallocated workstations. Such a low figure does little to support the desire for more flexible working.

Some countries, however, are emerging as leaders in agile and flexible working where a high percentage of communal space in an open-plan layout is paired with low density. These countries include Australia, Hong Kong, South Africa and the Netherlands. Conversely, other countries have a high proportion of shared spaces in an open-plan layout, but they also have to cope with high-density ratios such as those in Spain, India and Japan.



Top Five Innovative workplaces

An ideal work environment is a mixture of collaborative space and support services. Below are those most-provided by the companies today and in order of importance:



1. Community spaces

For example:
coffee/tea areas, lounges, terraces, etc.

56%



2. Spaces dedicated to collaborative working

For example:
“internal” informally arranged co-working spaces, war rooms or project rooms dedicated to a particular project for a certain period of time.

50%



3. Service desks

For example:
concierge, IT desk, dry cleaning service, etc.

33%



4. Creative spaces

For example:
brainstorming or design-thinking rooms, fab labs (open and participative manufacturing workshops), etc.

32%



5. Incubator or accelerator

For example:
dedicated space enabling colleagues and external talent to develop personal projects while making use of the company infrastructure, support and advice.

28%

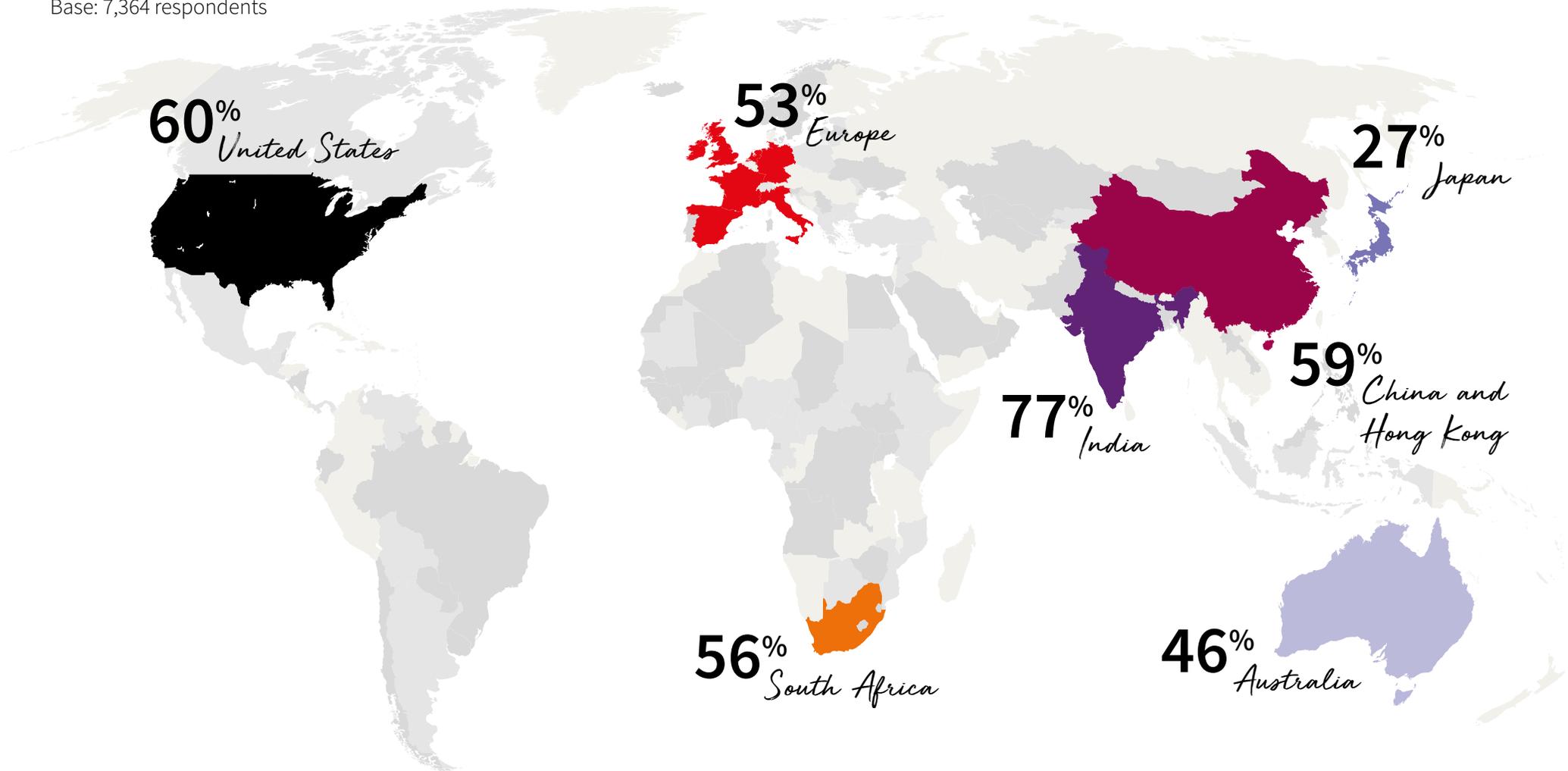
Home-working is the top choice

Home-working is the main alternative workspace for employees outside of company premises.

We asked:

Do you work from home?

Base: 7,364 respondents



Choice drives empowerment

Although home-working and operating out of other company sites remain the first choice alternative workspaces, agile working is on the rise with China, India and the US; they display greater levels of mobility than other countries. However, while employees may feel empowered to choose between a range of premises, they tend to opt for mobile working just a few days a month, with the greatest percentage of respondents saying they work remotely up to five days a month.

Over five days a month, the propensity to work remotely drops dramatically. However, there is a compelling case for companies to consider offering alternative workspaces. Our research shows that employees feel they can work more effectively when they have the possibility to work from alternative workspaces or third places outside the company.

We asked:

Do you also work in the following spaces?
(at least once a month)

Base: 7,364 respondents

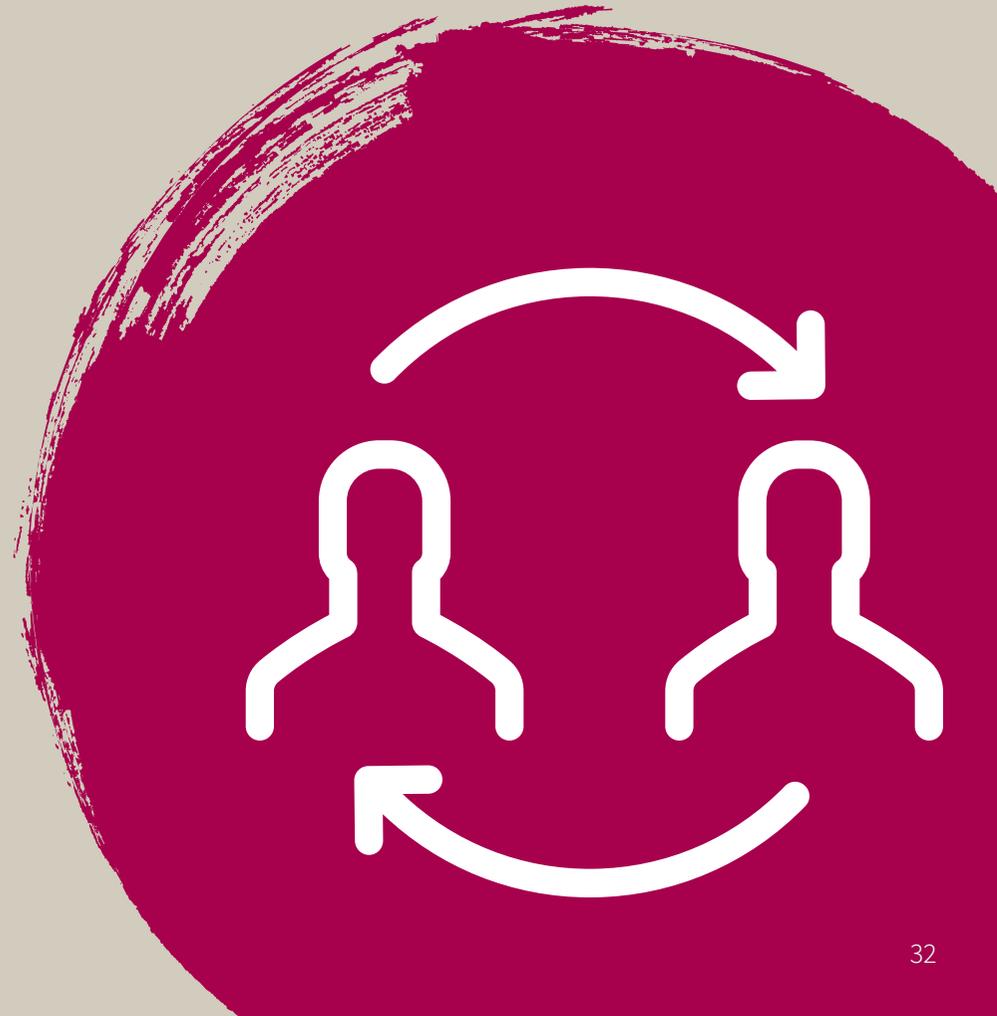
Do you also work:	Countries												
	US	UK	NL	GER	FRA	ITA	ESP	IND	CN	HK	JPN	SA	AUS
At home	60%	61%	59%	47%	44%	54%	56%	77%	67%	51%	27%	56%	46%
On other premises belonging to your company	61%	57%	49%	51%	41%	61%	61%	75%	82%	63%	49%	46%	44%
At client/partner sites of your company	54%	49%	31%	39%	30%	52%	54%	66%	77%	50%	34%	37%	28%
On public transport or in a hotel	45%	41%	25%	35%	27%	42%	48%	45%	70%	40%	29%	17%	25%
In other places (internet café, public library, co-working space, etc.)	49%	41%	22%	26%	19%	36%	40%	48%	58%	30%	22%	27%	28%

*Three Priorities
to Drive
Human Experience*

Three priorities to drive experience

Engagement

Fostering a sense of commitment, which drives employees' performance and effectiveness. It is an essential ingredient for facilitating organizational change. At work, people need to feel they have a purpose, operate in a nurturing environment in a business that allows them to prioritize their personal as well as professional development.

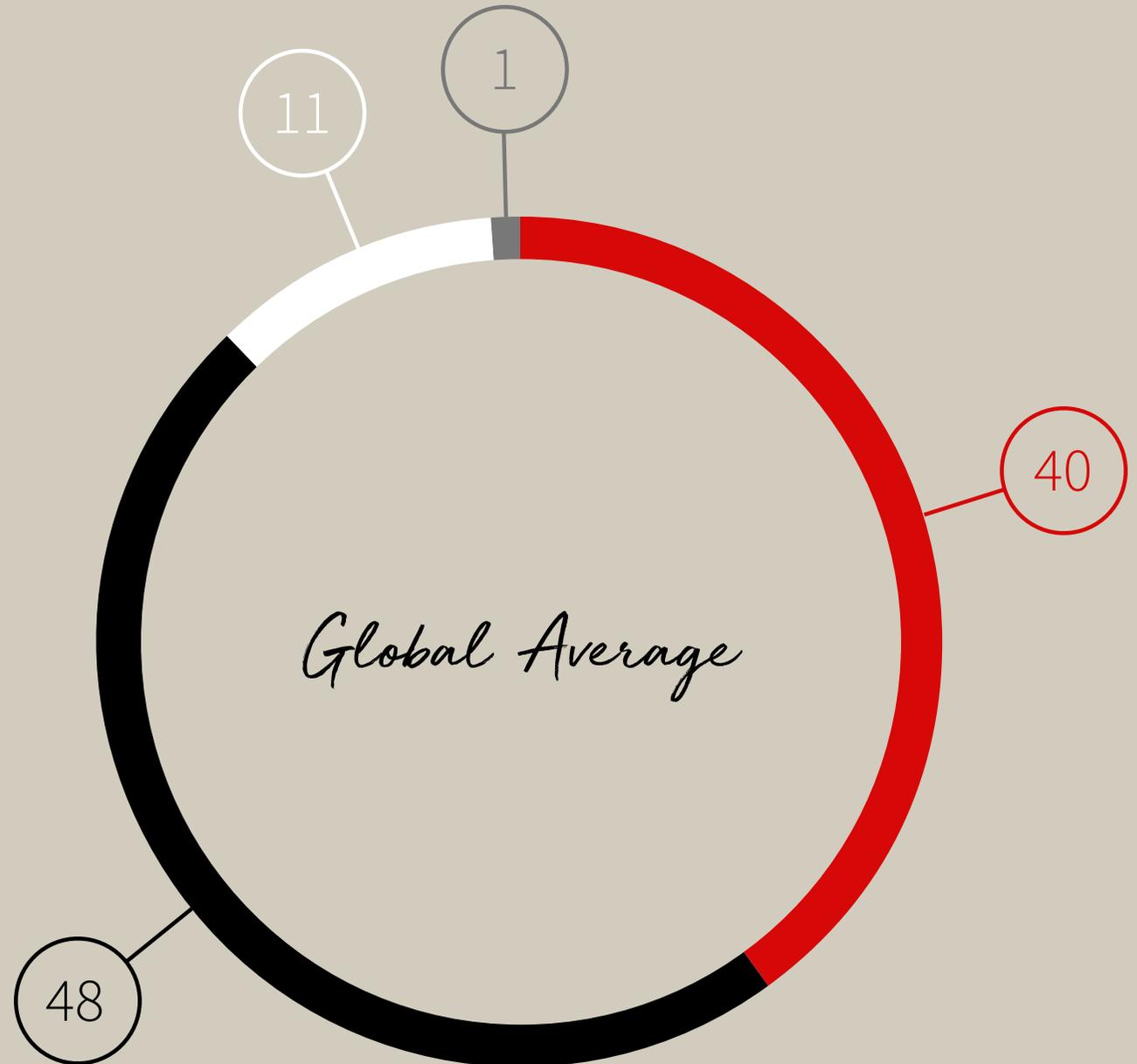


How engaged are employees globally?

A strong level of engagement at work overall and opportunities to boost performance.

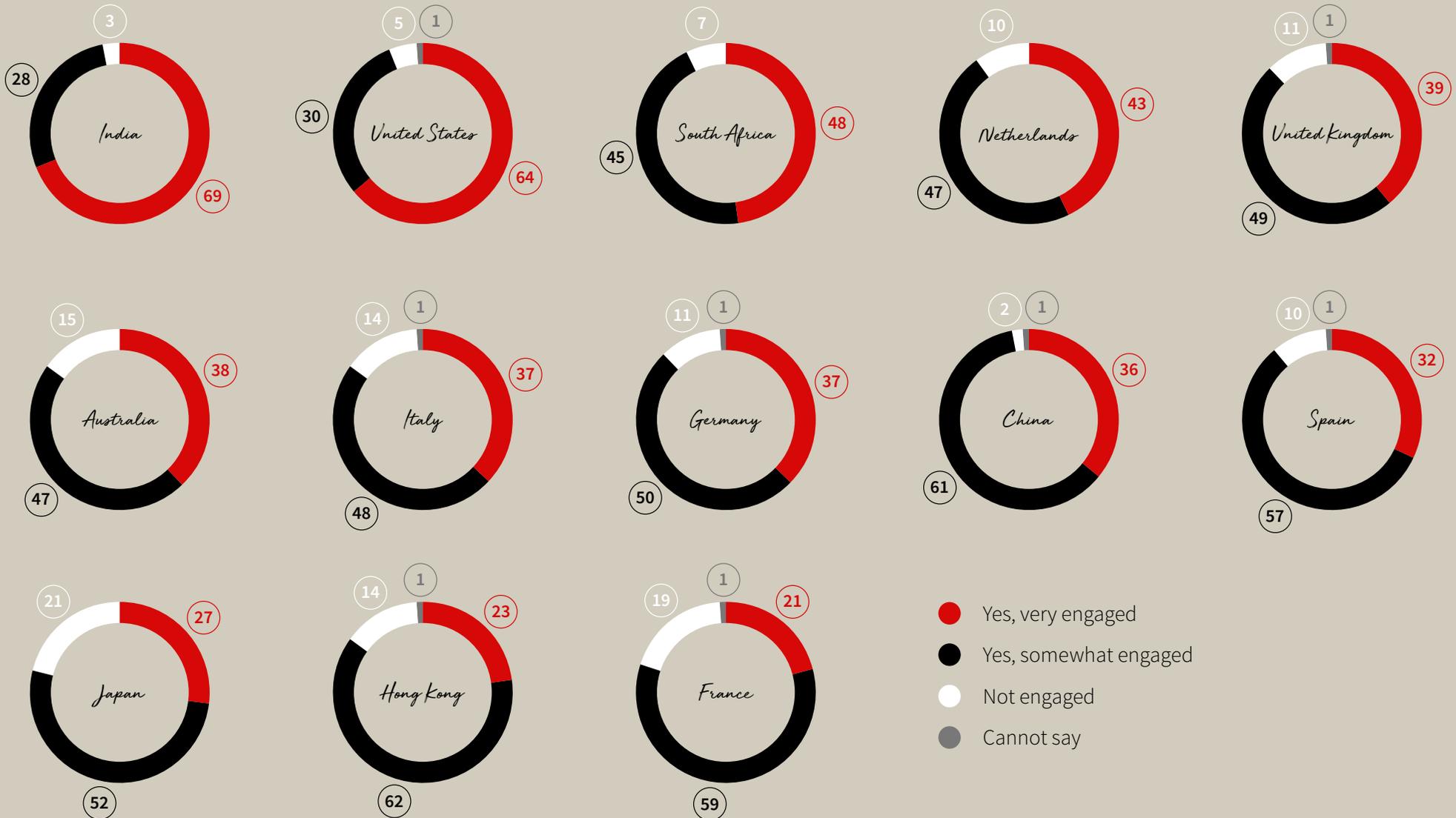
Forty percent of the respondents feel very engaged at work, whereas 59% claim they are not engaged or are somewhat engaged.

- Yes, very engaged
- Yes, somewhat engaged
- Not engaged
- Cannot say



How engaged are employees globally?

Engagement levels across key markets surveyed.



- Yes, very engaged
- Yes, somewhat engaged
- Not engaged
- Cannot say

Engagement *vs.* effectiveness

The majority of respondents (52%) feel their workplace enables them to work very effectively at work, leaving 48% seeking ways to feel more effective in the workplace. A large proportion (41%) partially agrees while less than 7% are not convinced that their workplace helps them to meet the right level of effectiveness. France, Japan and Hong Kong are the countries with the lowest level of satisfaction: one in ten respondents said they are not satisfied with their workplace. Although the 10% threshold is low, it does raise some concern among countries coping with high levels of ineffectiveness in the workplace.

Measures of engagement

Engagement boosts belonging, motivation and cross-learning. Employee engagement can be measured by looking into factors such as their desire to actively engage in learning and sharing, to grow within the company and to excel as if it were their own business.

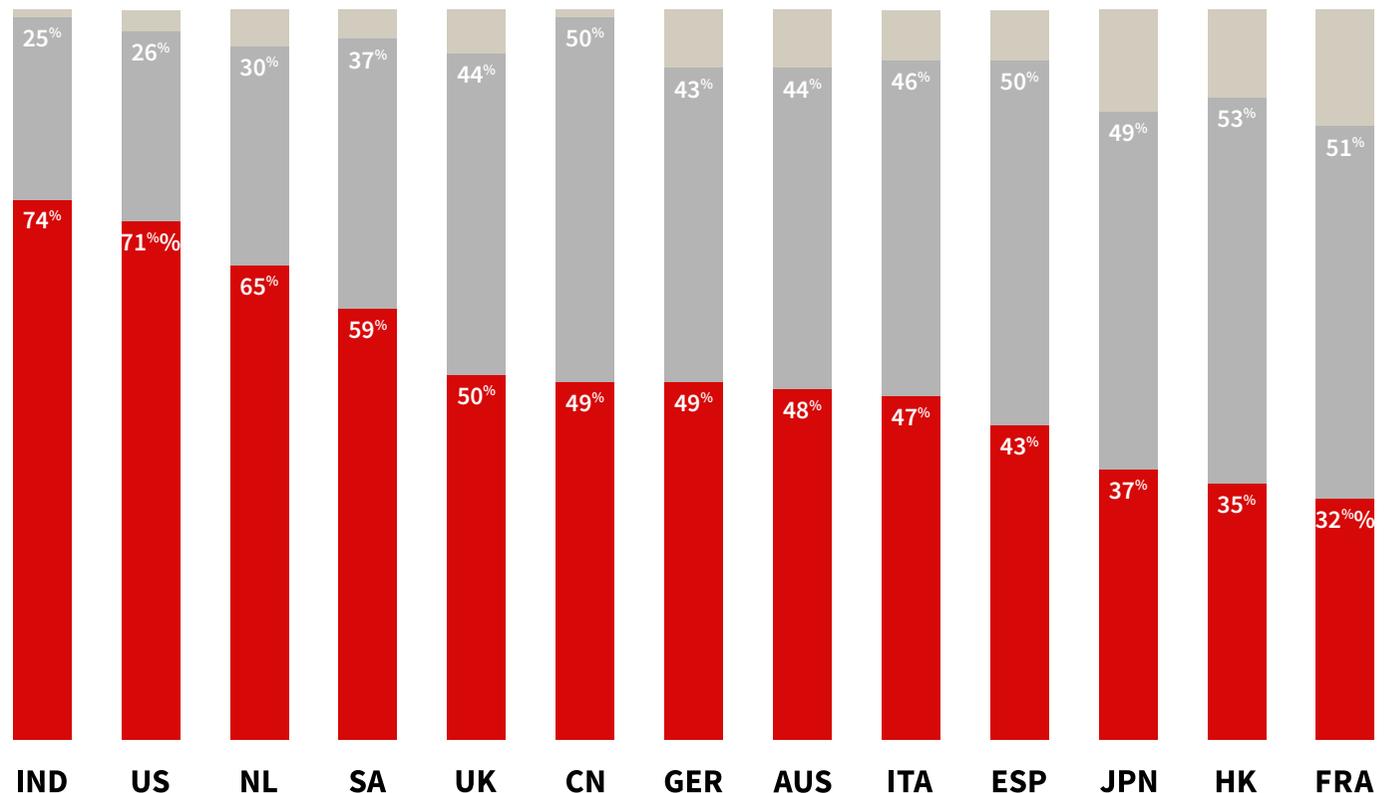
We asked:

Does the workspace provided by your company allow you to work effectively?

Base: 7,364 respondents

Global Average: **52%** **41%** **7%**

● Yes, completely ● Yes, somewhat ● Not efficient



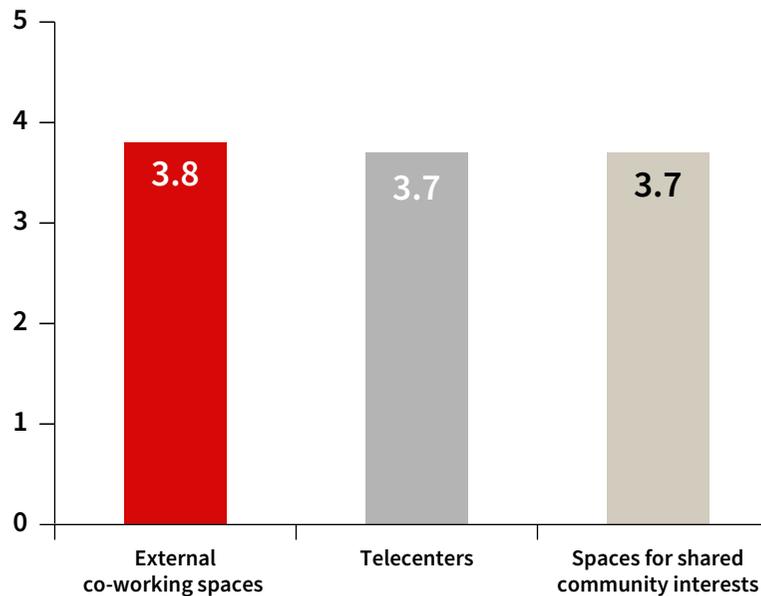
The haves and have-nots

Our survey shows distinct differences in the desire for certain types of space depending on what is currently provided.

Understanding the differences between the **haves** and **have-nots** and perceptions of a work environment, based on current and desired space provision, can help companies to attract and retain talent.

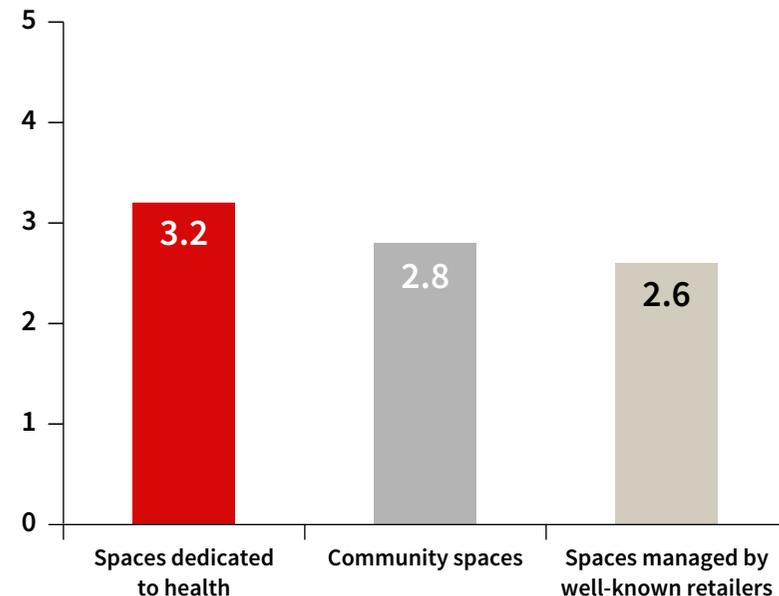
Retention

When employees **have** access to alternative work environments, the top three **with the biggest perceived impact on engagement** were found to be: (scored out of 5)



Attraction

When employees who **do not have** access to alternative spaces were asked what they thought would have the biggest **potential impact on engagement**, they said: (scored out of 5)

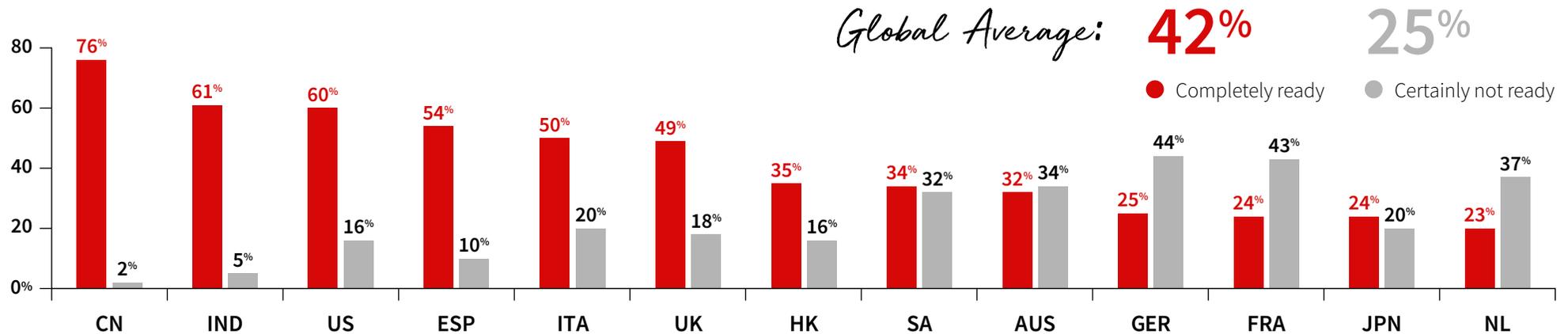


Readiness for change

Employees from India, China and the US could most easily let go of their enclosed office for more innovate types of space.

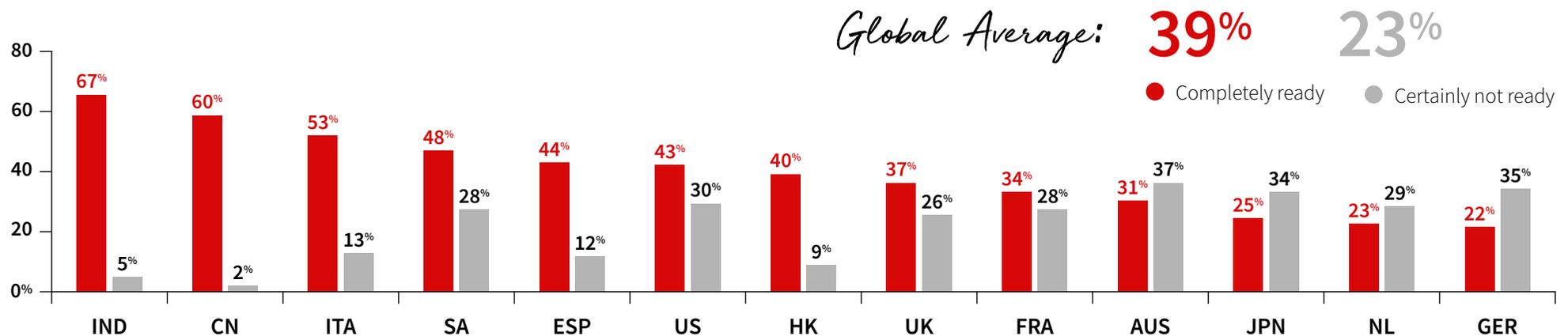
We asked: Would you trade an enclosed office for an open-plan desk in exchange for the access to innovative environments?

Base: employees currently installed in an enclosed office (either individual or shared)



We asked: Would you trade an allocated workstation for a hot-desk environment in exchange for access to innovative environments?

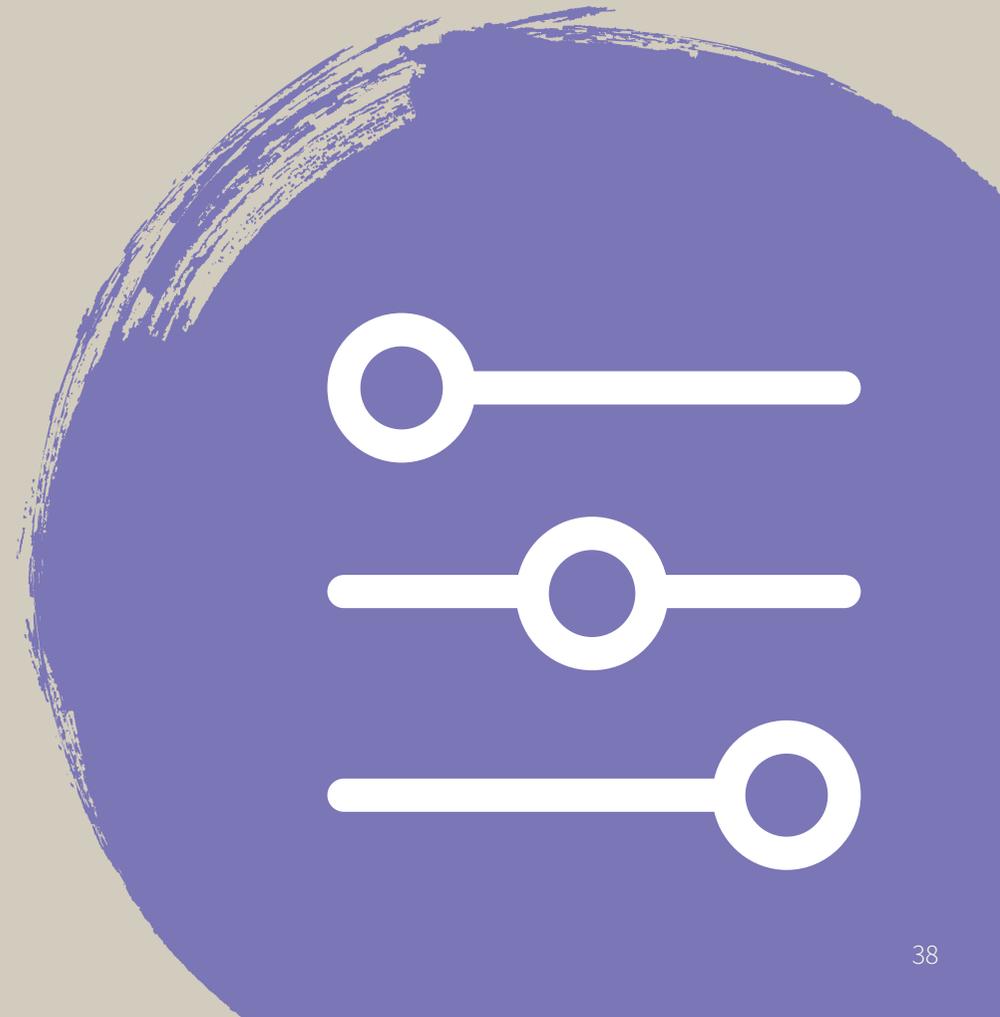
Base: employees currently installed in an allocated workstation



Three priorities to drive experience

Empowerment

Giving people a sense of control in their working environment can drive performance. Space to breathe, create and collaborate — alongside sustained opportunities for learning and excelling at work — enable organizations to build trust and transparency in the workplace, key ingredients for boosting performance and ensuring people have a sense of purpose at work.



Three ingredients for empowerment

**Employee commitment is driven
by trust and kindness**

We asked:

If your employer promoted these working philosophies, would they have an impact on your engagement at work?

Base : 7,364 respondents

1
Trust

Feeling trusted by the
management team

2
Kindness

Being able to rely on a kind
management team

3
Taking Initiatives

Being encouraged to take initiatives
without fear of being judged

Empowerment through management

Working in a trusting environment empowers people and is one of the best tools for improving engagement across organizations of all sizes.

We asked:

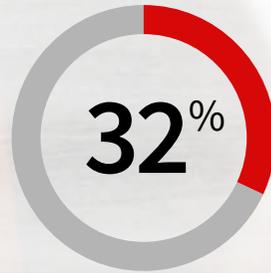
If your employer promoted these working philosophies, would they have an impact on your engagement at work?

Base : 7,364 respondents

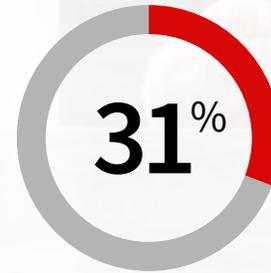
1. Trust



2. Kindness



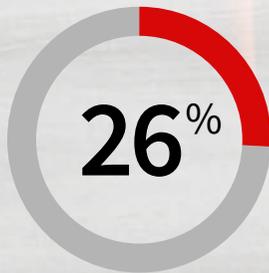
3. Taking initiatives



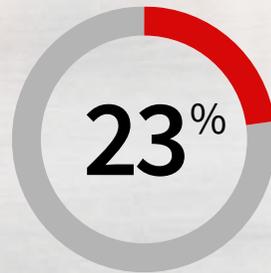
4. Autonomy



5. Corporate democracy



6. Horizontality



7. Boldness



● Percentage = very positive impact on engagement (grade 5 on a scale of 0 to 5)

Empowerment through management

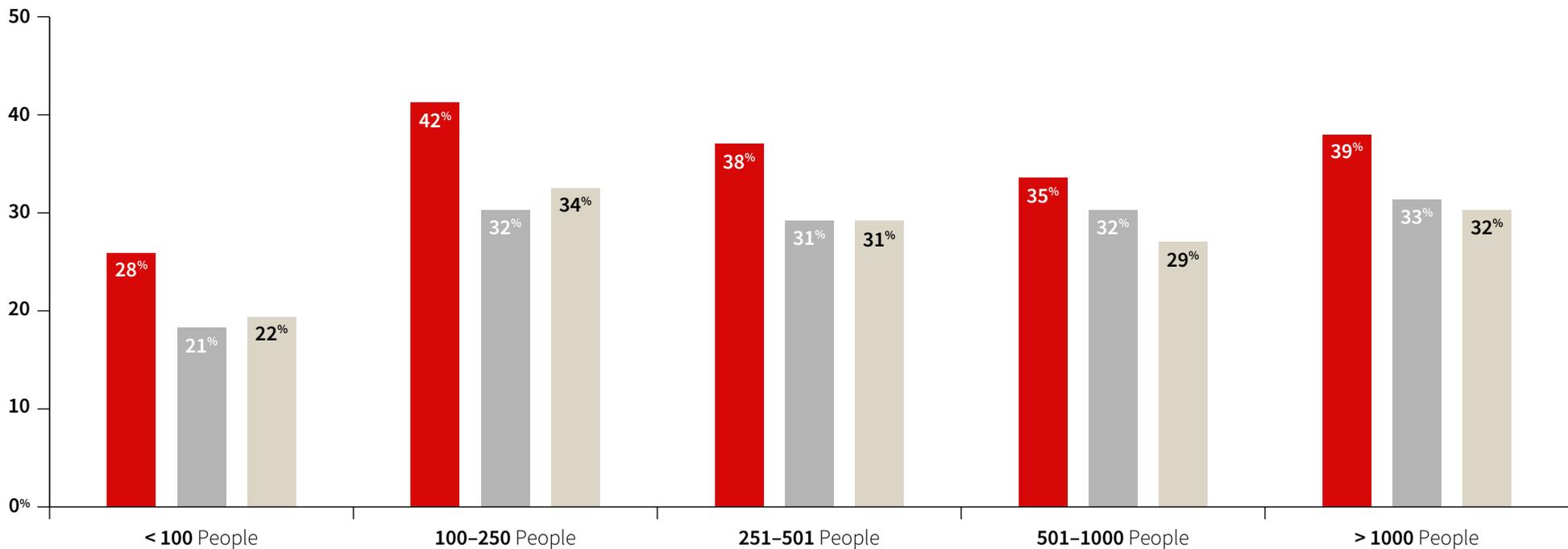
Although trust always comes first, the larger the organization the more the need for kindness.

We compared:

Engagement levels vs. site size

Positive and very positive impact (grades 4 and 5 on a scale of 0 to 5)

Base: 7,364 respondents



- Trust: Feeling trusted by the management team
- Kindness: Being able to rely on a kind management team
- Taking Initiatives: Being encouraged to take initiatives without fear of being judged

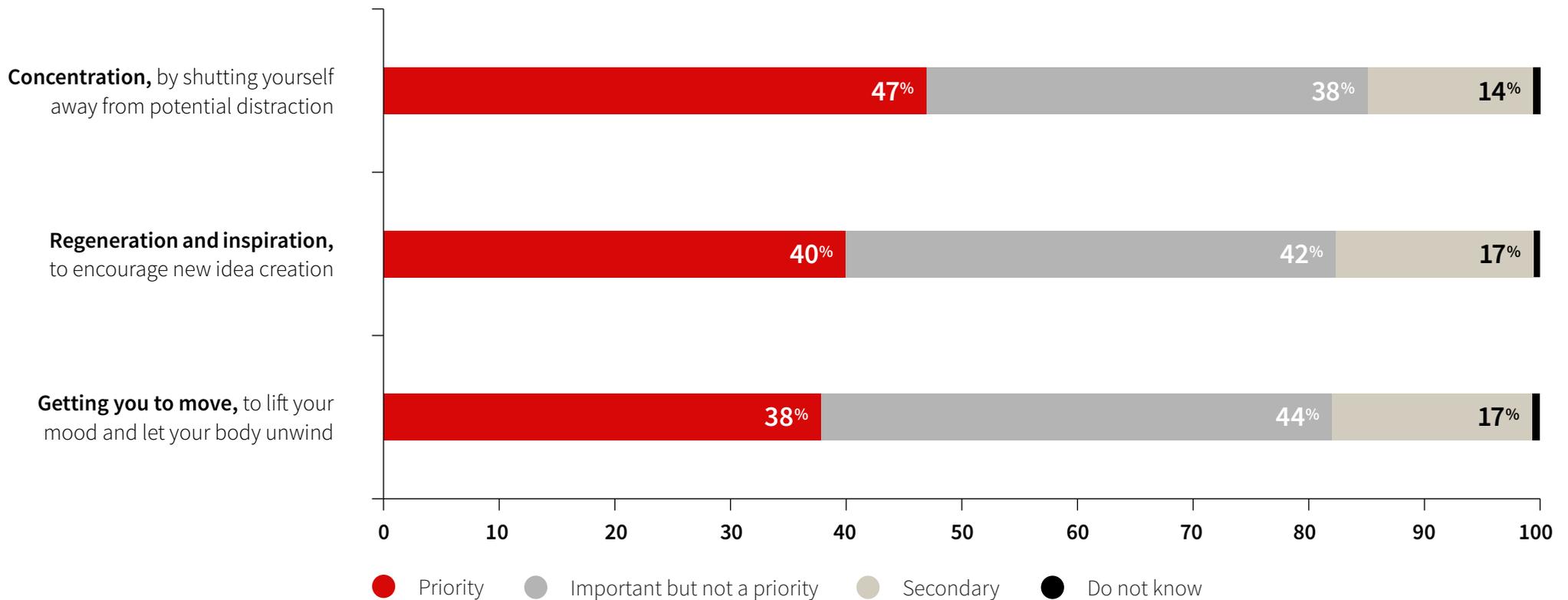
Empowerment through the workplace

Concentration is the utmost priority, while encouraging creativity is more important than mobility in the workplace.

We asked:

In a world where we are all under pressure and overloaded (calls, emails, internal messaging, texts, spontaneous interruptions from colleagues, surrounding noise etc.), to what extent is it important to you that your workplace offers spaces for...?

Base: 7,364 respondents



Three priorities to drive experience

Fulfillment

Making sure work feels comfortable beyond surface-level happiness. Employee health needs to be ingrained into the vision of the organization, and creating positive experiences in the workplace will require companies to rethink their real estate and strategic direction. This should be balanced with rewards and recognition that boost a feeling of belonging and satisfaction.



Fulfillment — the new happiness

We asked:

What creates a **unique** experience at work?

Base: 7,364 respondents

Happiness
1

Recognition
2

Personal learning and development
3

Creativity
4

Inspiration
5

Happiness at work is the best ingredient for a unique work experience

We asked:

Select the five criteria that would give you the feeling of having a unique experience of work.

Base: 7,364 respondents

A work environment should facilitate...

Happiness at work

69%

*AUS • GER • SA

Recognition

60%

FRA • GER • SA

Personal learning and development

54%

ESP • NL • SA

Creativity

53%

US • IND • JPN

Inspiration

43%

AUS • IND • SA

Personalization

34%

HK • NL • ITA

Groups and community

31%

GER • CN • JPN

Technological innovation

25%

IND • ITA • JPN

Switching off and meditation

25%

GER • HK • JPN

Digital experience

24%

UK • AUS • SA

Emotion

22%

CN • HK • NL

Boldness

21%

FRA • CN • JPN

Wonder

16%

FRA • CN • HK

Games

12%

US • UK • CN

*Countries with the highest percentage of respondents favoring this category

A dedicated role to drive experience at work

A Chief Happiness Officer is a compelling new role for companies in the future according to 33% of respondents.

The creation of a role dedicated to **well-being and the employee experience** would be...

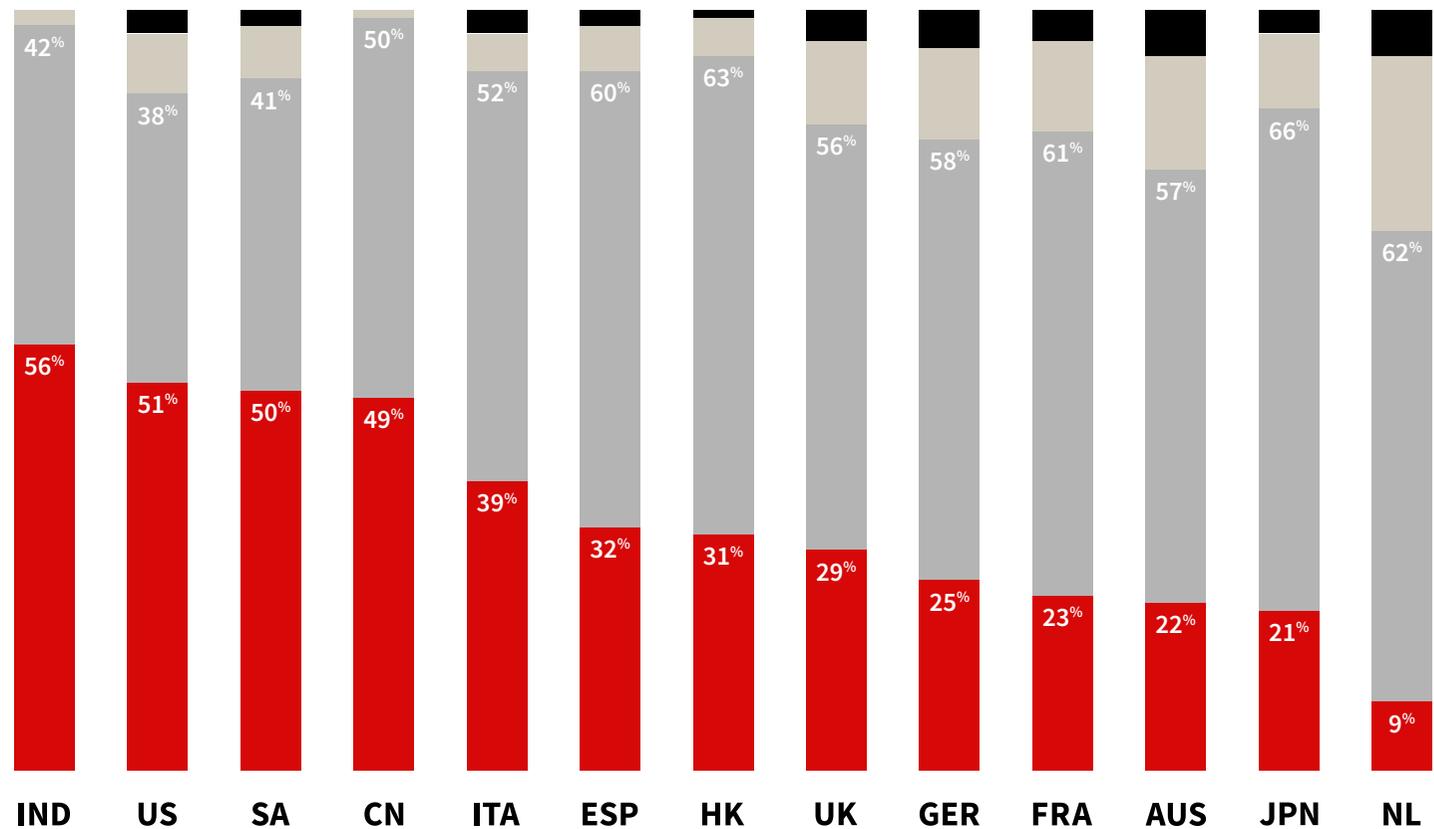
Global Average: **33%**



We asked:

Some companies have created new roles dedicated to well-being and the employee experience (Experience Director, Chief Happiness Officer, etc.). In your opinion, the creation of such roles in your company would be...

Base: 7,364 respondents



Ideal company for the next job

Large corporations are still attractive, but employees crave an entrepreneurial culture. Either in a large corporation or outside, 46% of employees today aspire to work in a start-up environment.

We asked:

If you were moving to a new company tomorrow, what kind of structure would you like to work in?

Base: 7,364 respondents

Large corporation

61%

CH • FRA • JPN

=

Be an employee in a large corporation

40%

¹CN • HK • JPN

+

Be an employee in a large corporation but work in a start-up environment

21%

FRA • NL • SA

Total entrepreneurship

25%

SA • IND • ITA

=

Be an intrapreneur²

9%

SA • ITA • US

+

Become self-employed or an independent worker

9%

SA • NL • IND

+

Work in a start-up

7%

IND • US • ITA

Small and medium enterprises

14%

UK • GER • NL

1. Countries with the highest percentage of respondents in this category

2. Working in a company that allows you to work on a **personal** professional project on its premises while benefitting from its support

Conclusion & Key Takeaways

Key Findings

Human Experience in real estate is a key differentiator for how employees interact with an organization, and it should therefore play a key role – both strategically and operationally to drive engagement, empowerment and fulfillment.

Key Findings

Human experience is a key differentiator for how people engage with an organization

Human experience is driven through Engagement, Empowerment and Fulfillment

Experiences help individuals and companies to align and advance their ambitions

Culture and values are crucial to drive the means of engagement

Health and well-being must be ingrained into the vision of the organization

Workplaces must provide a broader range of innovative spaces to meet employee expectations and attract and retain talents

Spaces dedicated to collaboration and teamwork have the strongest impact on productivity

Large companies are urged to foster an entrepreneurial culture

Effectiveness is linked to workplace density

A Chief Happiness Officer should be fully devoted to employee well-being

Work-life balance differs greatly around the world

Agility improves performance

Employee's commitment is driven by trust and kindness

Innovative workspaces drive engagement and boost the quality of life at work

Key Takeaways

Workplace

Powered by Human Experience

The future of real estate is more human than you think.

Despite the advances in technology and increasing levels of automation seen across the real estate sector, properties will remain people-oriented. As a result, creating memorable experiences is more important than ever.

The design and configuration of workplaces, as well as CRE strategy, will evolve to put human experience at the heart of modern workspaces. Understanding the ecosystem in which employees operate and thrive is critical to business success as aesthetic solutions alone are no longer enough to attract, retain and nurture talent.

Throughout this report we have explored the human experience model through the three experience priorities — engagement, empowerment and fulfillment — but, practically speaking, how can a business implement changes and new structures to facilitate such experiences?



Key Takeaways

Although the recommendations will vary from business to business and real estate portfolio to portfolio, broadly speaking, there are three areas to focus on:



Space

The space provided by a company can directly impact employee experience levels. New types of spaces can facilitate new ways of working and contribute to an overall more positive experience and fulfillment within their workplace.



Product

The companies best equipped to offer a positive employee experience will stitch their spaces and services together with a solid digital platform to drive performance.



Services

Offering employees a choice over how and where they work gives them a sense of control and contributes to their professional empowerment and, ultimately, how engaged and fulfilled they are.

Key Takeaways

Engagement must come first

Engagement is an essential ingredient for facilitating organizational change. Engaged employees are committed, and commitment, ultimately, drives the performance and effectiveness of both individuals and businesses. This survey has shown us that levels of engagement vary widely from market to market, and so too does the definition of what it means to be engaged. Culture and values drive engagement with strong differentials around the world.

On average, 40% of the employees questioned are very engaged at work. Their engagement relies on these **individual levers**:

- Knowledge-sharing and transmission
- Excellence at the service of the company
- Career growth within the company
- Pride to work for the company

Culture and values drive engagement (by country)

Pride

US, FRA, AUS

Belonging

GER, NL

Dedication

JPN

Active collaboration

ESP, ITA, IND

Challenge

CH, SA

Fulfillment

UK, HK

Key Takeaways

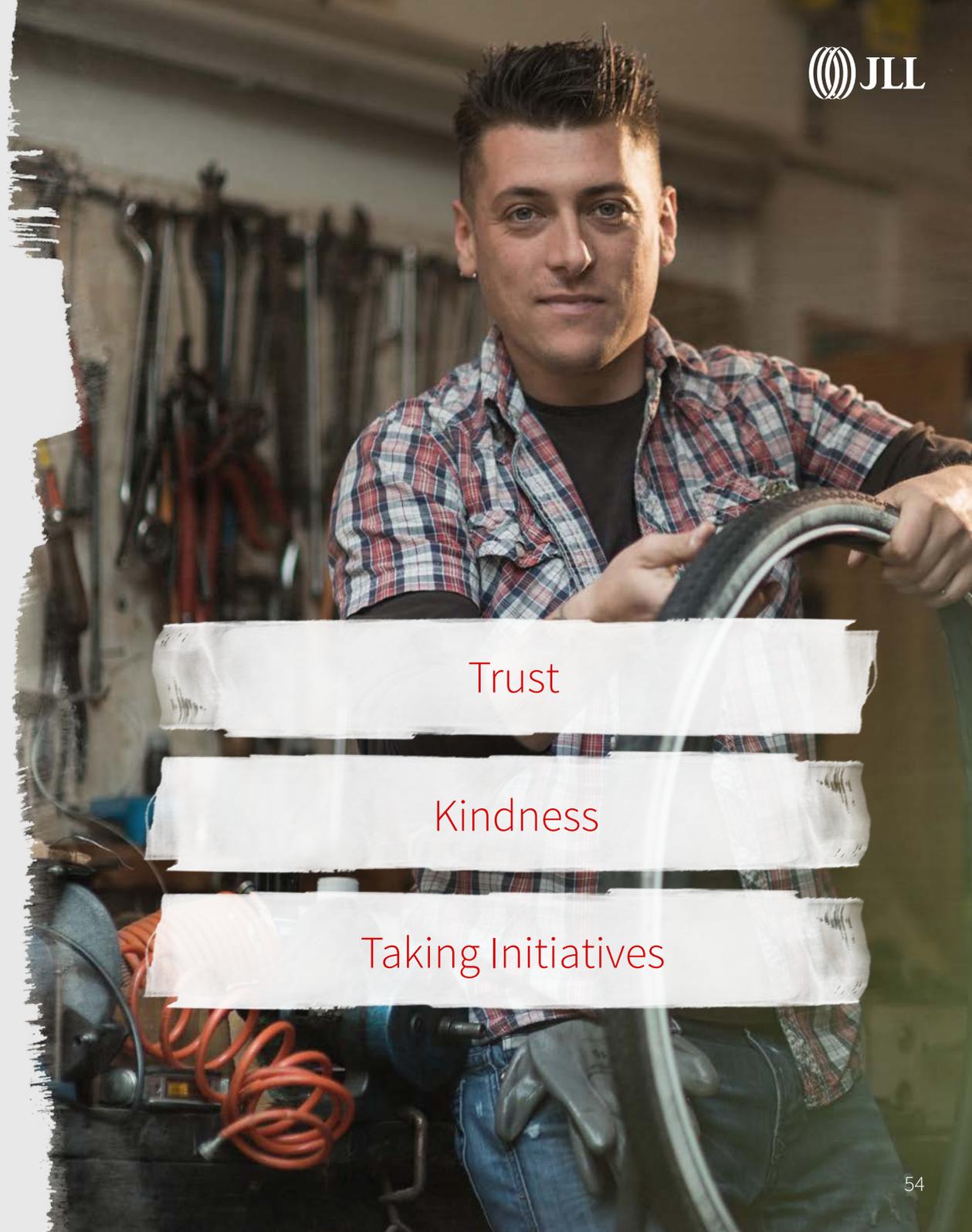
Employee commitment is driven by trust and kindness

Overall expectations for a **better engagement at work** relate to:

- **Trust, kindness, taking initiatives and autonomy**

Trust tops the list as having the biggest positive impact on work engagement, but other work philosophies stand out:

- **France, United States, South Africa and China** are more convinced by management kindness
- **India, South Africa, United States and Italy** are more convinced by the autonomy to take responsibility and taking initiatives



Trust

Kindness

Taking Initiatives

Key Takeaways

Activity-based working should lead the way

The survey highlights a desire among employees for workplaces to provide space suitable for a wide range of work activities including:

Concentration (47%), then for **regeneration (40%)** and for **getting employees to move (39%)**.

- **India, China, United States, Italy and South Africa** are more convinced by spaces offering regeneration and inspiration
- **China, India, Spain and South Africa** expect space for moving
- **Germany and China** have clearly expressed a need for concentration
- Conversely, **Australia, Hong Kong and the Netherlands** are less convinced that such spaces can adequately offset pressure and overload at work

Failure to provide sufficient space for concentration, in particular, was found to negatively impact effectiveness and the performance of people.



Concentration

Quiet, focus, contemplation

Regeneration

Wellness, power-up, recharge

Getting employees to move

Healthy and controlled collision

Key Takeaways

Agility improves performance

Working from home and other premises has become increasingly common, and organizations need to ensure that their workspace is agile enough to accommodate fluctuating demand. Providing different work settings as well as allowing employees to work from elsewhere entirely, through co-working arrangements, for example, can signal trust, which empowers employees. Moreover, access to external co-working spaces can significantly improve employees' work-life blend.

- The survey found that companies do not currently offer many of the alternative workspaces surveyed, but two of them stand out: **community spaces** (such as coffee/tea areas, lounges, terraces etc.) and spaces dedicated to **collaborative working and project teams**. This indicates a clear grasp by businesses of the necessity to translate collective working and corporate cohesion into practical office layouts.
- Bolder environments are far less common: only one-third of the companies are equipped with creative spaces or incubators. Once again, American, Indian and Chinese companies distinguish themselves by offering more of these environments to their employees, while Western European countries (France, Spain, Germany and Japan) have far less access to them.



Community Spaces

Collaborative working
and project teams

Key Takeaways

Fulfillment is the new happiness and requires a challenge-centered work organization

All countries agree the key asset for a unique experience of work is **happiness at work** (69%, even more so for Australia, Germany, South Africa and France) followed by **recognition** (60%, more mentioned in France, South Africa and Germany), **personal learning** (54%, more frequently selected by South African and Dutch employees) and **creativity** (53%, preferred in the US and India). In addition to collective and collaborative space, space for individual care, well-being and happiness at work is core to a truly unique experience. Introducing spaces dedicated to well-being and health, day care facilities for children and food and beverage points, for example, can improve an organization's competitive position.

- **Companies should consider spaces dedicated to health and well-being.** For example: siesta or meditation rooms, gyms, medical consultation rooms (GP, osteopath, nutritionist, beautician, etc.)
- **Taking pride in a work environment** is particularly important for attracting and retaining the younger generation.

The main assets for a unique work experience can be summarized in the **four dimensions** below :

Challenge/Innovation

A dimension with creativity, technology innovation, digital experience, boldness and game

Personal development/Emotion

A dimension with happiness, inspiration, meditation, emotion and wonder

Individual

A dimension with personal learning, personalization and recognition

Collective

A dimension with groups and community

Key Takeaways

Chief Happiness Officer: a role fully devoted to employees' well-being

In this context of a constantly evolving work life, the creation of a specific role dedicated full time to the employees' well-being and work experience becomes a primary challenge for companies around the world. Confronted by the possible appointment of a Chief Happiness Officer in their company, employees react with strong approval of the measure (87% think this would be a good idea). However, this new job title is met with varying positive reactions:

- **India, the US, South Africa and China** are the most convinced by the utility of a CHO
- **Netherlands, Japan, Australia, France and Germany** are the least persuaded by the importance of this new function in their company



Recommendations for CRE

“

As workplace strategy moves from practical, design-based decision-making to a more experience-led approach, expect an overlap with functions that have traditionally been the domain of HR teams.

This will impact workspace design and decision-making.

Dr Marie Puybaraud

Global Head of Research, JLL Corporate Solutions



Engagement must come first

- Introducing innovative workspaces will drive engagement
- Use workspace to foster an entrepreneurial spirit to attract and retain employees
- Consider adjusting workplace density to improve employee effectiveness
- Formalize human experience in the organizational structure



Empowerment will drive change

- Trust, kindness and taking initiatives — the top three work philosophies — will empower employees
- Agility — choice to work elsewhere will improve performance and quality of life
- Employees appreciate space for concentration, regeneration and movement



Fulfillment is the new happiness

- Happiness is the number one priority for a positive workplace experience
- Companies must consider spaces dedicated to health and well-being
- Managerial approaches linked to recognition and personal learning and development also impact employee fulfillment

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