

*(re)imagine*

**Insights 2021** – syftet med framtidens kontor och konsekvenser på fastighetsmarknaden

*Miranda, Max, Niclas*  
21-03-25



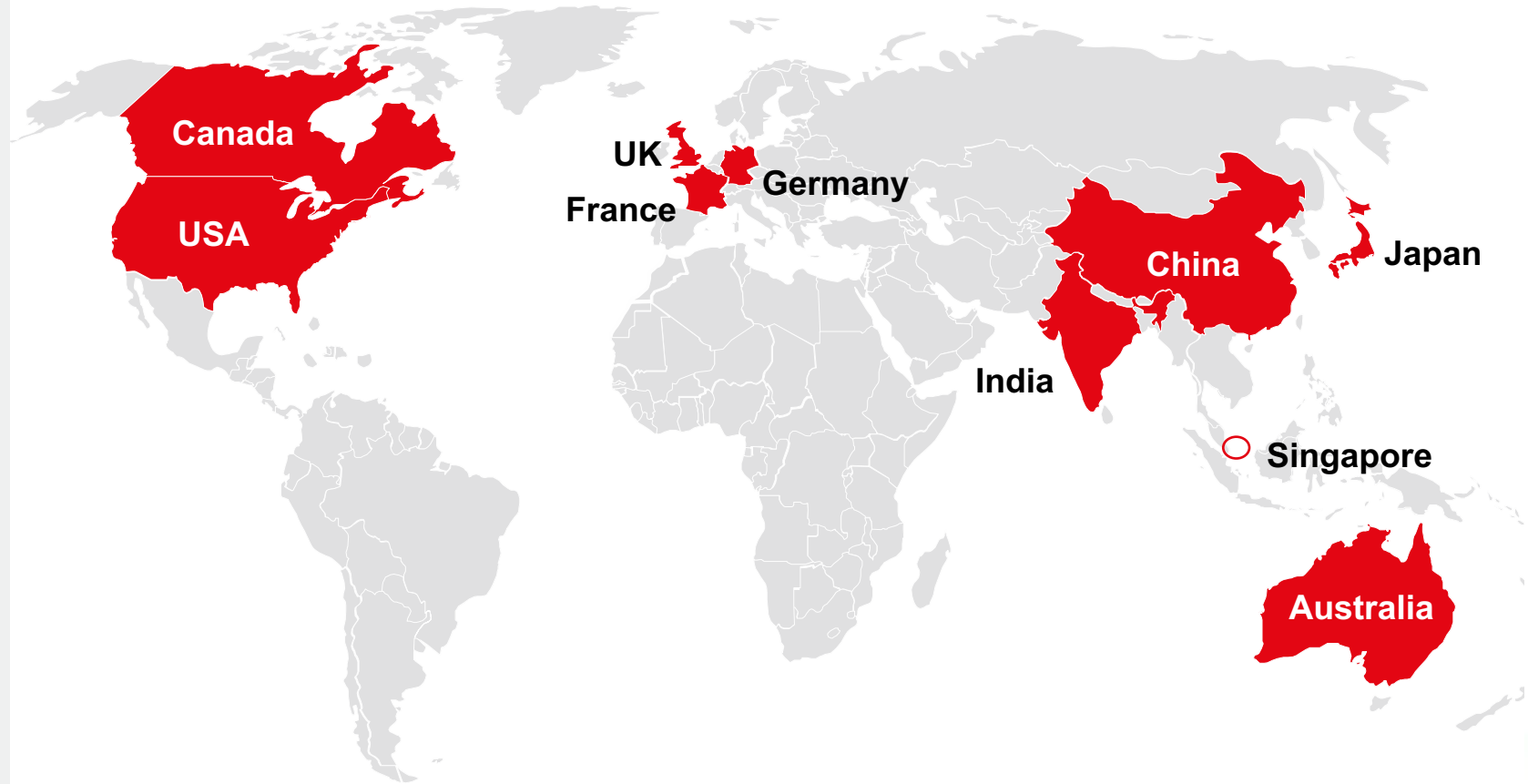
# A major survey to uncover new workstyles and employee expectations in the post-pandemic world



**2,033** office workers  
**10** countries  
**200** respondents per country  
All major industries  
Online survey, October 2020

## Respondents Profile

- 18+ yo
- Working in multinationals (70%) & SMEs (30%)
- Quotas on age, managerial responsibilities, company size and industry



**Insight #1:**  
**Employers are facing  
new mental, physical  
and social well-being  
expectations.**

**51% of employees are concerned  
about the future and worried about  
losing their job**









# The crisis has driven employees to rethink their life priorities



**Work-life balance  
has overtaken  
securing a  
comfortable salary**

## Top 6 employee priorities today vs. existing priorities before COVID

- 1. Work-life balance 
- 2. Comfortable salary 
- 3. Purposeful job 
- 4. Local and conscious work life 
- 5. Physical and mental health 
- 6. Connection to my work community 

## **Insight #2:** **Hybrid work is the new normal**

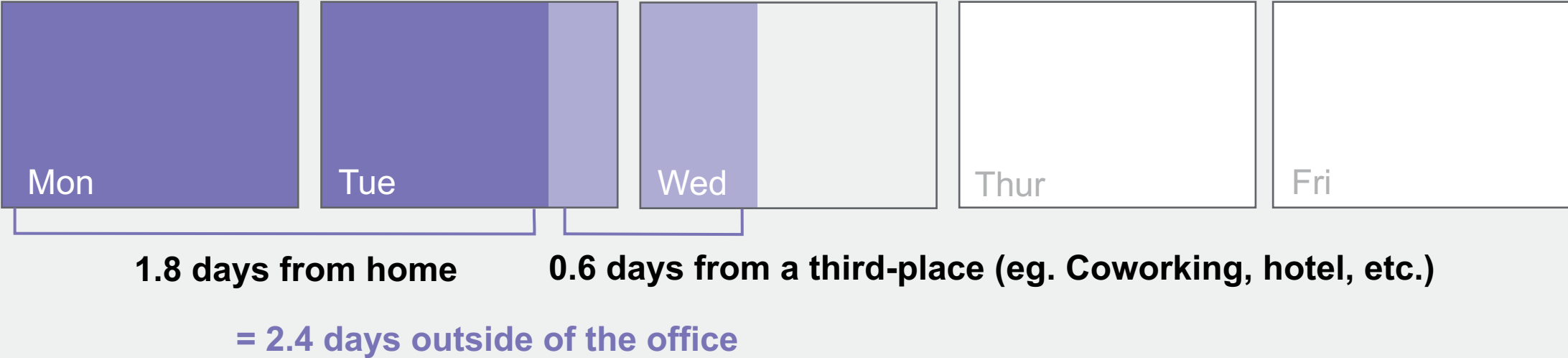
**Remote work is set to double,  
from 1.2 days pre-pandemic  
to 2.4 days a week**



# The crisis is accelerating the transformation of work at an incredible pace



## The average working week in the post pandemic world

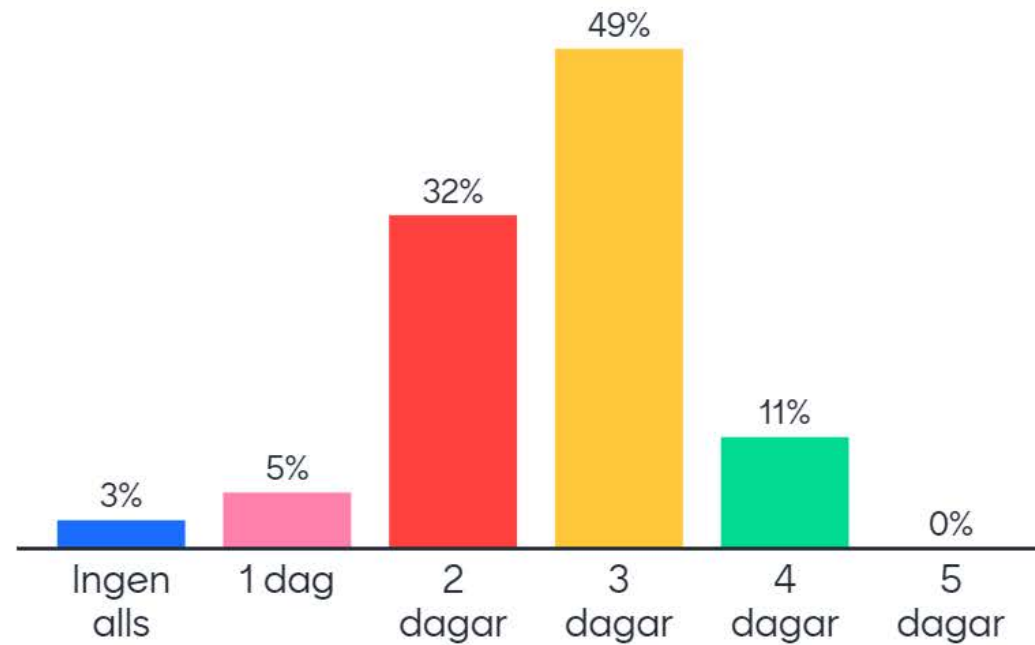


Q. How many days a week would you like to work remotely after COVID-19?

## Fråga #1:

Hur många dagar per vecka tror ni att man kommer vilja arbeta på kontoret framöver?

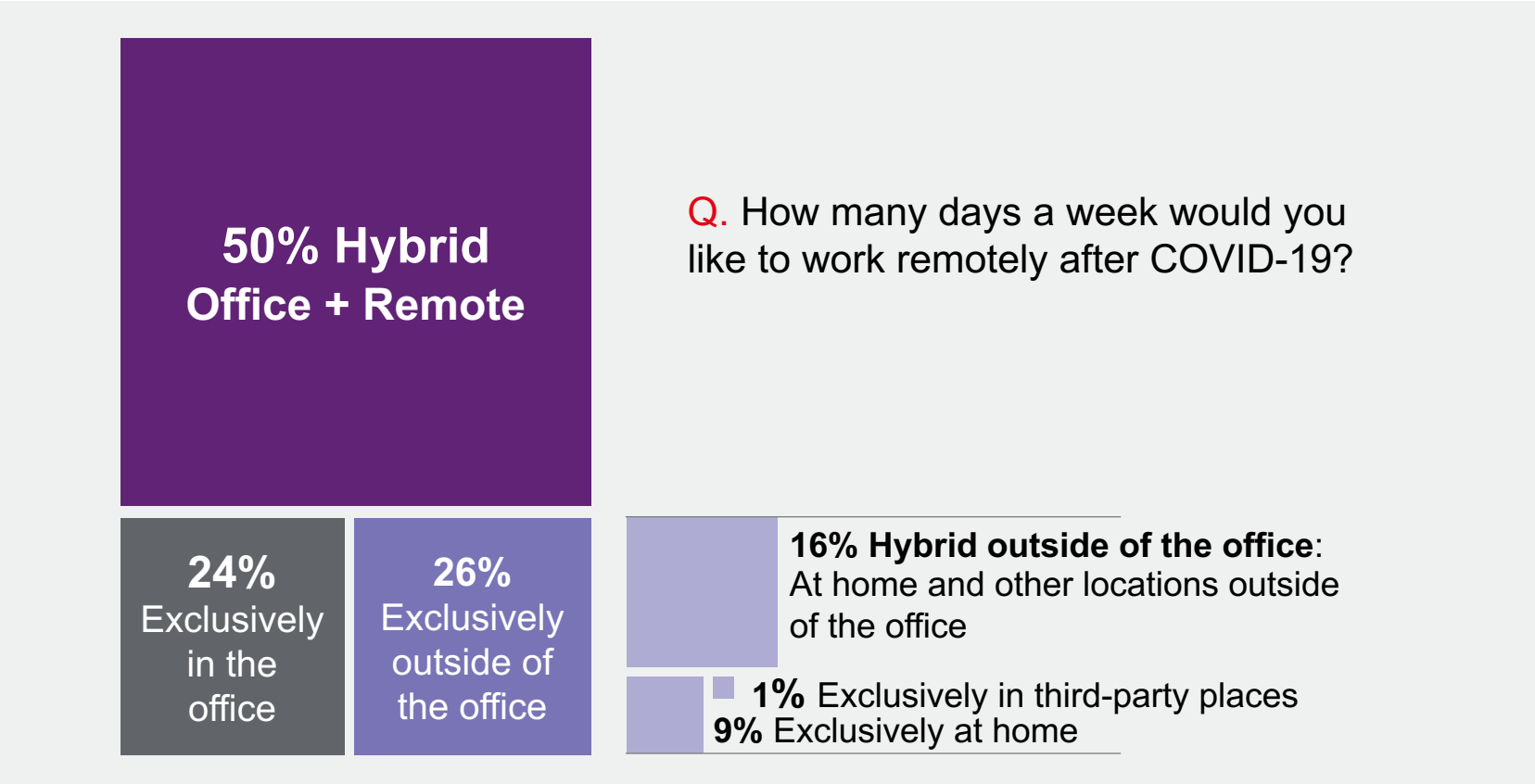
Mentimeter



# The future will be hybrid: 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**





**Insight #3:**  
**Work from-home is not the panacea for satisfying all workstyles**

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

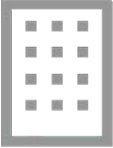
**24% want to work exclusively in an office**



# A new purpose for the office is emerging



**The office is becoming a hub for collaboration, problem solving and career development**



### Better in the office

Manage or be supported

Collaborate and run meetings

Solve work-related issues



### Better at home

Switch off after a hard task

Concentrate on a task



### Better in a third-party place

To socialize

Be inspired

**Insight #4:**  
**The rise of remote work  
is raising new questions  
about employer's  
responsibilities.**

**75% of employees are expecting  
their company to support their  
home-working**



# Employees have new expectations while working from home

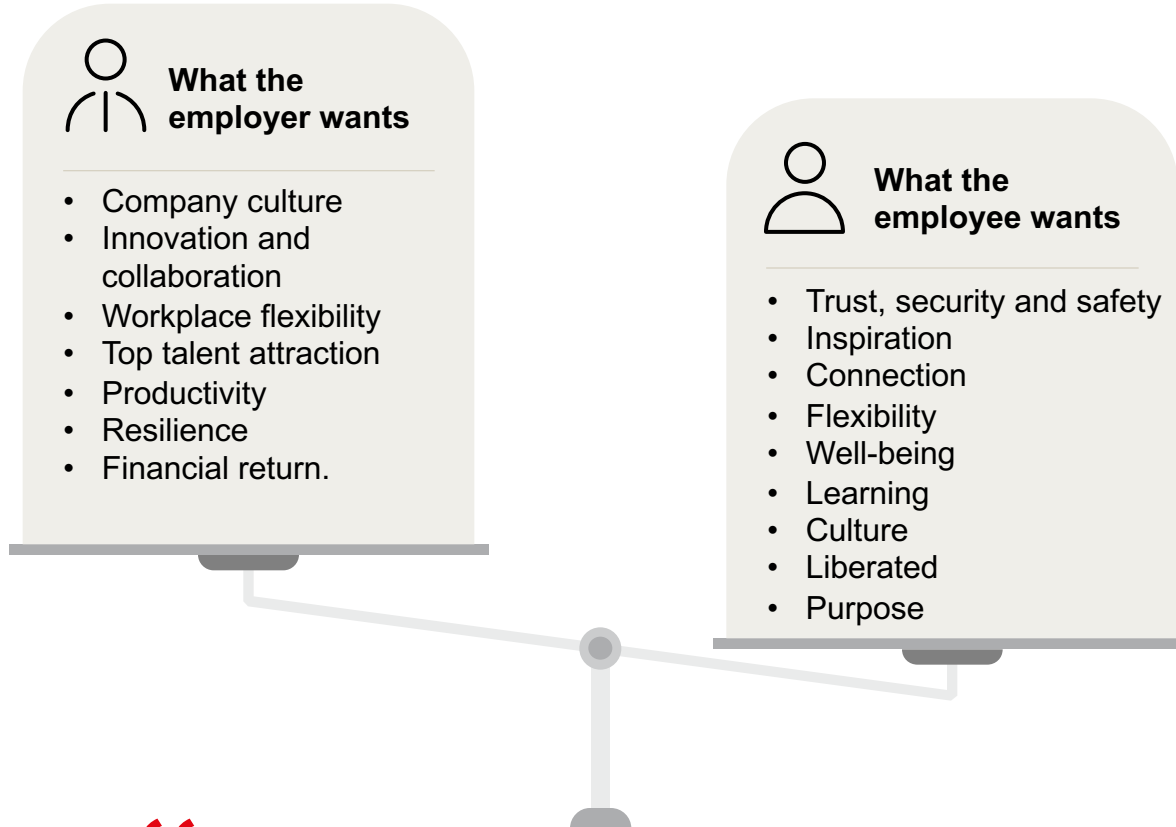


- ✓ **47%** expect support with their technological needs
- ✓ **36%** an allowance to improve home-working set up
- ✓ **33%** electricity and internet expenses
- ✓ **25%** an ergonomic workstation at home



- ✓ **20%** Access to online 'experience' services  
*(live sport classes, food delivery, remote medical consultation etc)*
- ✓ **13%** The purchase of additional square meters to allow for a dedicated office space at home

# All points toward a workplace where employee and employer's interests will need to converge

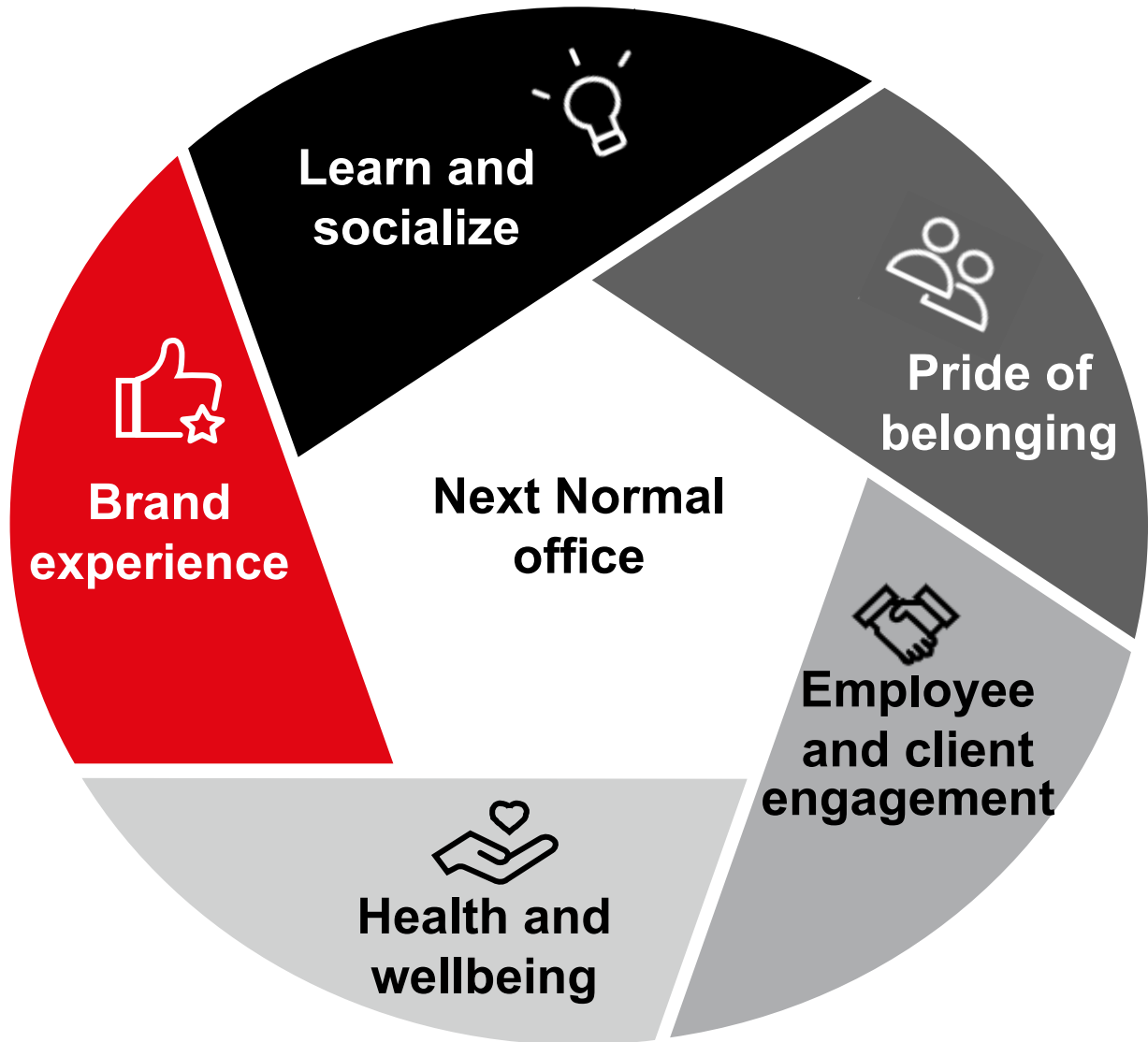


“ *Human, flexible and positive work environments that attract, retain and empower the workforce* ”



# Reimagine - New purpose

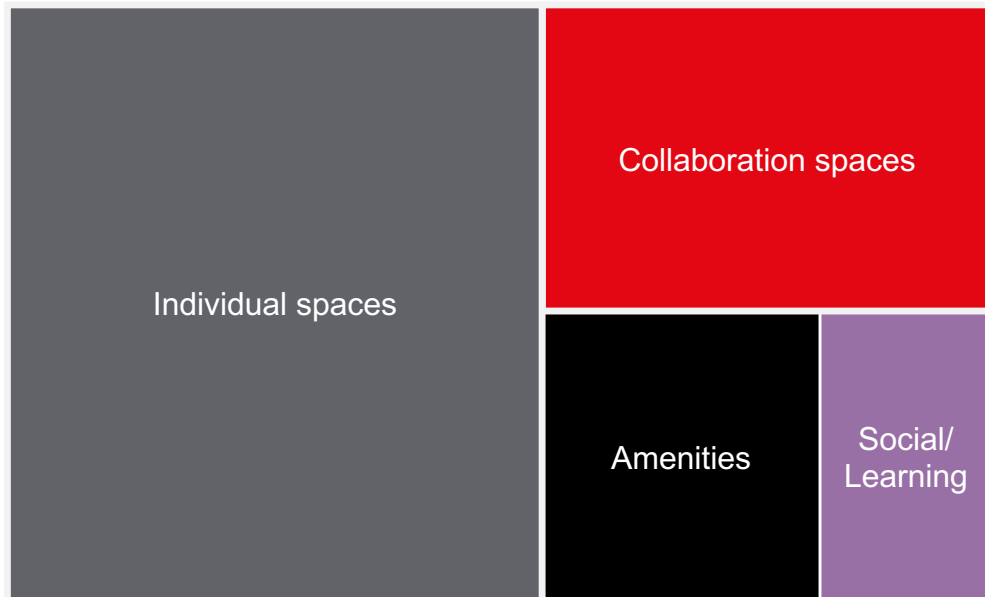
*Which will be your office's New Purpose?*



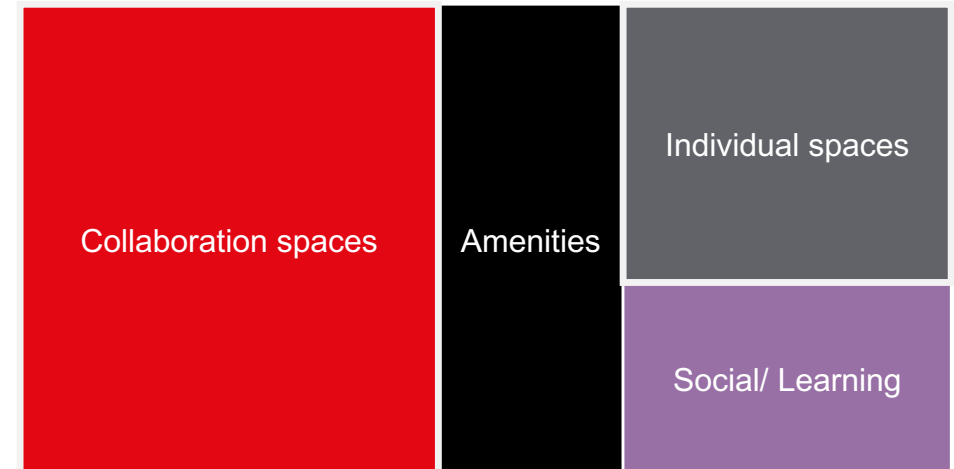
# The Change Forecast for the Workplace of the Future is profound and transformational



## Historical Office/Workplace Allocation



## Future Office/Workplace Allocation



### PERSONAS:

- 1/5 days at office per week
- 2/5 days at office per week
- 3/5 days at office per week
- 4/5 days at office per week
- 5/5 days at office per week

**60-70%** Individual & Support Spaces

**30-40%** Collaborative & Social Spaces



**50-70%** Collaborative & Social Spaces

- Fixed Day
- Gravity day
- Team Day
- Community Days
- Learning Days
- Well-being days

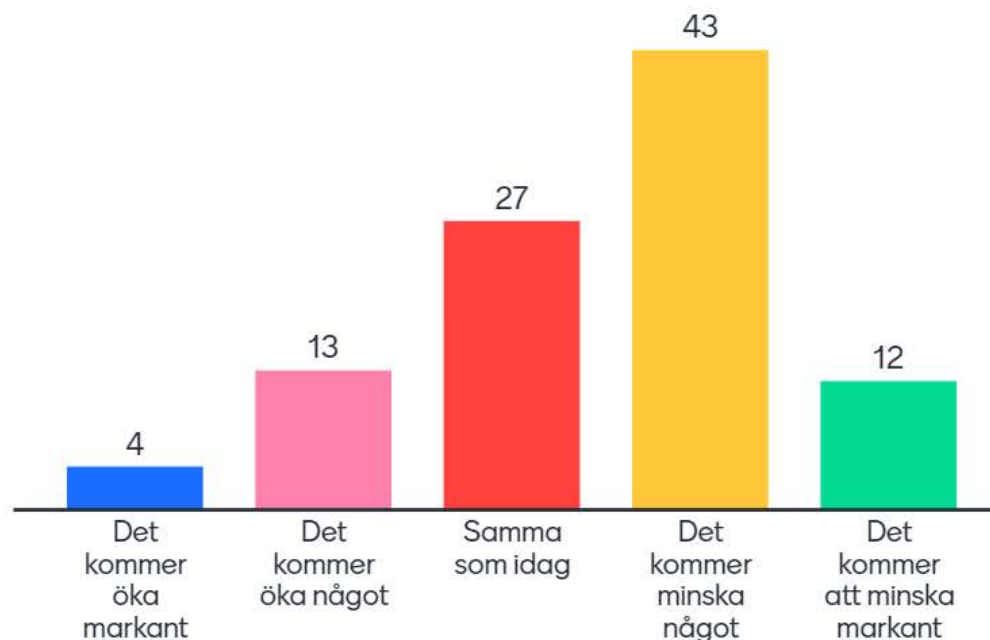
**30-50%** Individual & Support Spaces

- Wellness Program
- Brand Awareness Initiatives
- Community Building
- New Technology Ecosystem
- Knowledge Sharing
- & Learning Action Plan

## Fråga #2:

Hur tror ni att ert ytbehov kommer förändras på två års sikt?

Mentimeter





# The hybrid continuum



MINIMAL PORTFOLIO  
FOOTPRINT OPTIMIZATION

MODERATE PORTFOLIO  
FOOTPRINT OPTIMIZATION

MAXIMUM PORTFOLIO  
FOOTPRINT OPTIMIZATION



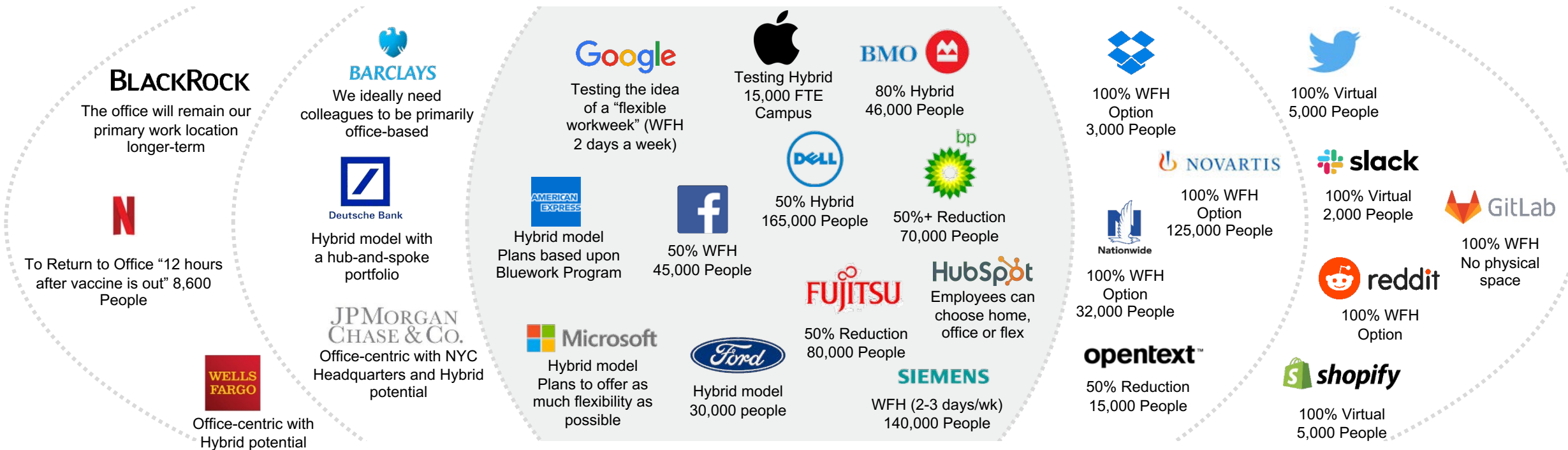
**OFFICE-CENTRIC**  
Employees to work primarily from the office

**OFFICE/HYBRID**  
Global / Regional Experimentation

**HYBRID**  
Global / Regional Policy Implementation in-progress

**HYBRID/REMOTE**  
Employees to work primarily from home

**REMOTE/VIRTUAL**  
Extensive global virtual work adoption



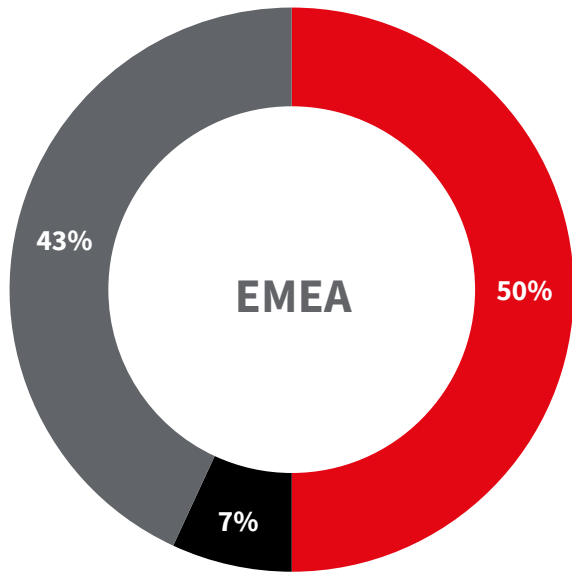
Sources: Public Domain as of January 15th, 2021

# Workplace 'experience' to be enabled and enhanced by technology



# Offices / Polarisation | Flight to quality

Focus on health, wellness & employee experience to drive demand for high quality smart buildings



■ Increase ■ Decrease ■ Same

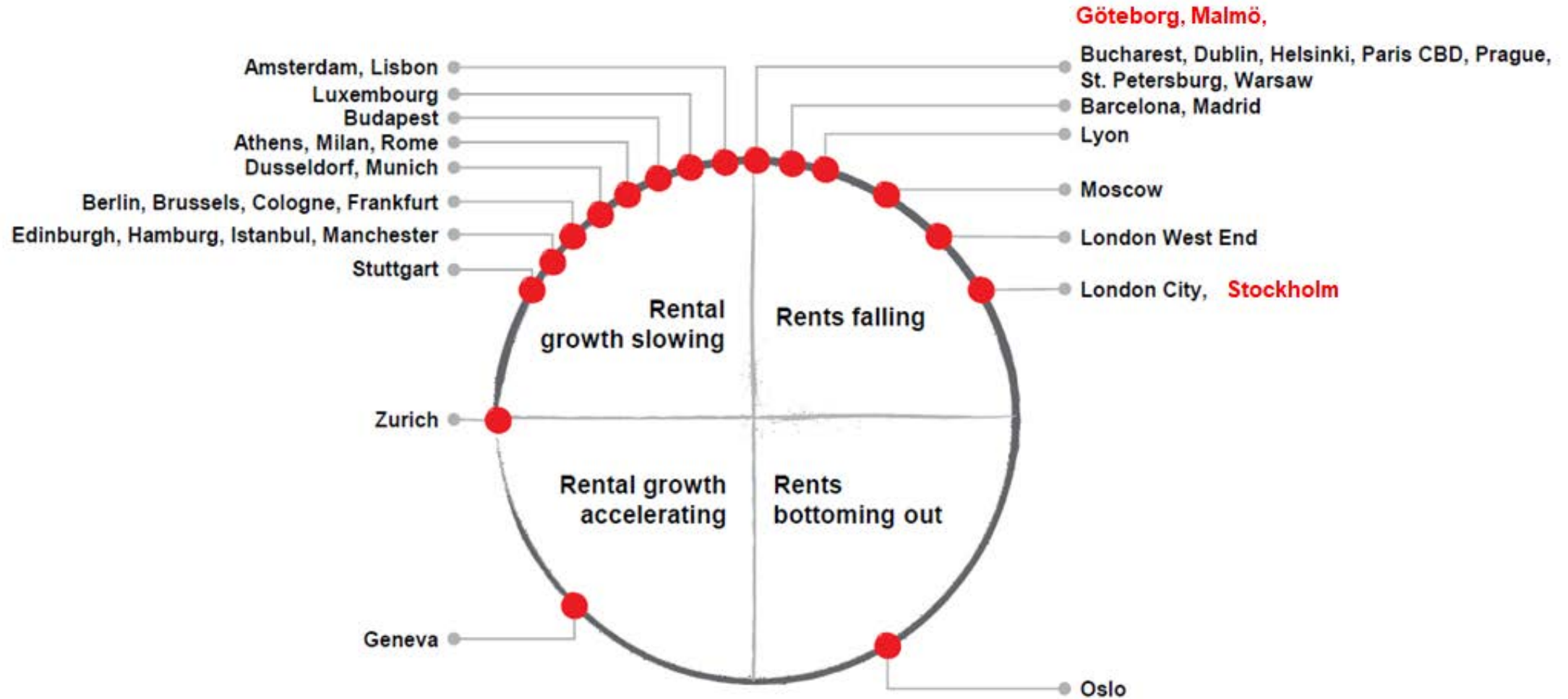
Future corporate demand:  
Impact on  
*Higher Quality Spaces*  
in the portfolio

**Due to Covid-19 crisis, how will the quality of your footprint change in the medium to long term?**  
Sample : EMEA = 160

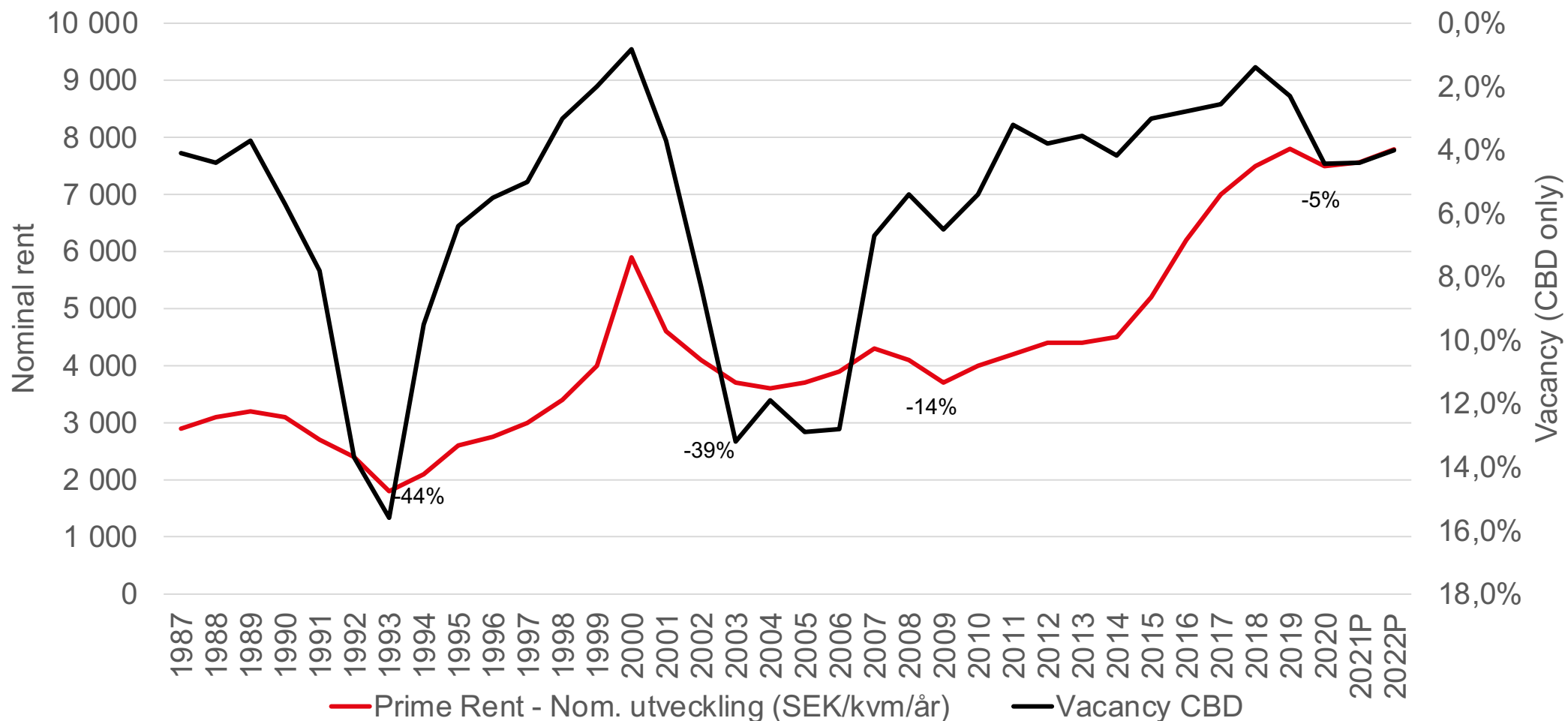
Source: JLL, Covid-19 EMEA Occupier Sentiment Survey, September 2020.



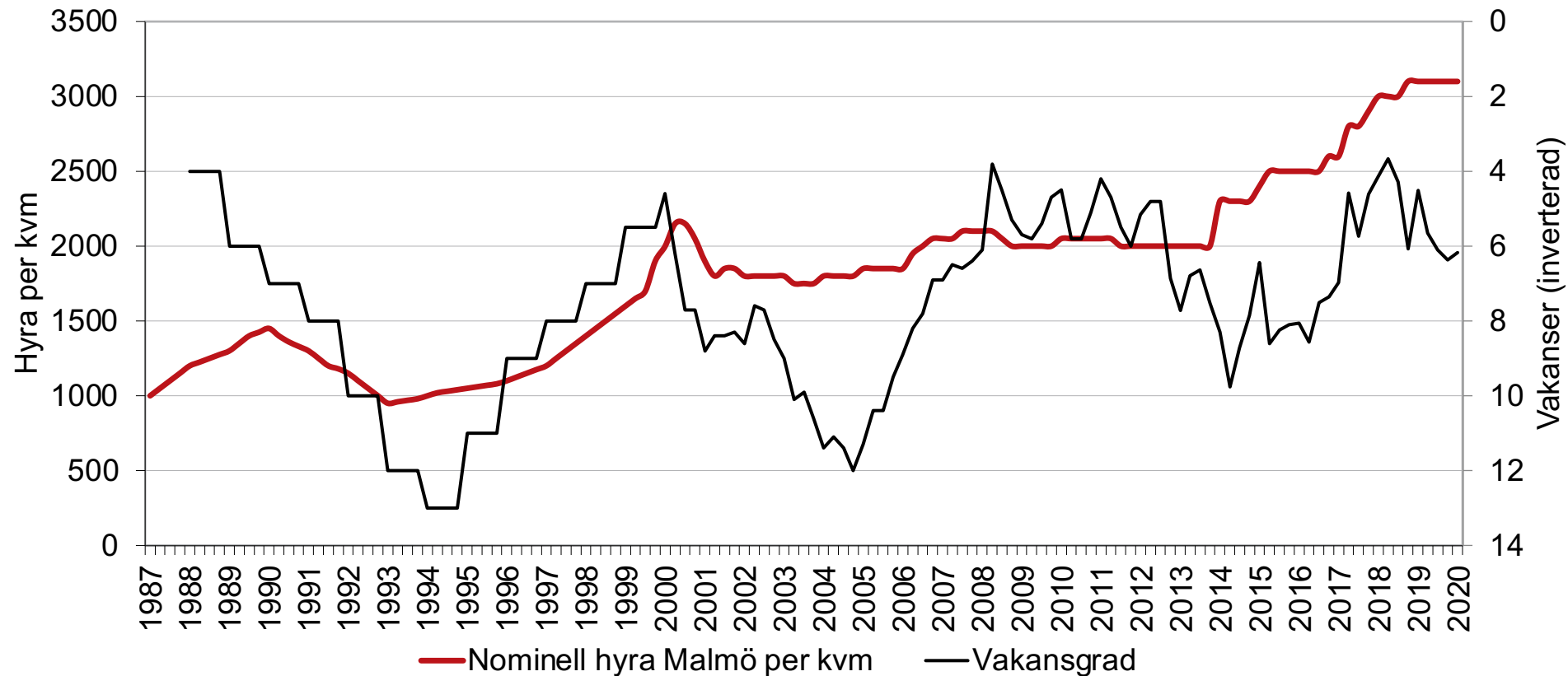
# Hyresmarknaden i Europa – JLL property clock



# Skall inte hyrorna ner i Stockholm? Vakanserna begränsar nedsidan



# Hur ser det ut i landet? Malmö bra exempel på stabilare hyror men högre vakanser.



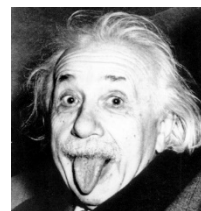
# Drivkrafter & Trender

Fortsatt bra case för stabila CBD-hyror i Stockholm  
– drivet av kvalitetsförbättringar

**4 000-5 000 kr/kvm**



Yta per anställd har minskat ca 50% sedan 2000



Förädlingsvärde per anställd inom tjänstesektor (i Sverige i genomsnitt) har ökat med nästan 80%



**8 000-10 000 kr/kvm**

Förädlingsvärde per kvadratmeter har därmed ökat med mer än 200% under samma period

*Thank you*