



JLL Work Dynamics

# **Top CRE Trends 2022**



# Top 10 global CRE trends in 2022

**Business success lies in staying ahead of the curve and predicting the right step to take next for people, planet and profit.**

In the 7th edition of the Top 10 Global CRE Trends report, we identify the emerging turning points in business in 2022. We explore how firms can reinvent their corporate real estate strategies in response to ever-changing business priorities, a challenging operating landscape and a volatile economic environment.





# 2022: The new world of work

## Enabling the future of work

The global COVID-19 pandemic has proven to be an accelerant of change and transformation for many organizations. Some of the ensuing changes were a long-time coming, such as the increased push towards a more sustainable, tech-infused world. Other shifts, like evolving working habits, had been bubbling farther below the surface, accelerated by the ongoing pandemic.

From the speed at which workplaces are changing, to the prospect of further market disruption, 2022 is expected to be another year of transformation.

The major trends shaping real estate are set to influence decisions throughout 2022.



# Top 10 global CRE trends in 2022



## Hybrid work

Embracing hybrid work will be key to supporting organizational agility and workforce flexibility



## A flexible future

Flexibility will be an essential driver of agile and adaptive office portfolios



## Thriving workforce

Nurturing talent through human-centric workspaces and workforce strategies will gain prominence



## Regenerative workplace

Tomorrow's workplace will prioritize physical and mental wellbeing of people to enable worker performance



## Workplace equity

Diversity, equity and inclusion will be critical for talent attraction, innovation and performance



## Technology intelligence

Leveraging the transformative potential of big data for strategic planning and decision-making will significantly progress in 2022



## Dynamic deployment

Organizations will transition toward digital solutions that 'fit and flex' with their organization best



## Return on sustainability

Translating sustainability targets into credible action plans will drive real impact from real estate



## Urban transformation

The future urban ecosystem will reflect cities' shifting focus on experience, habitat and innovation



## Partnership ecosystem

Ecosystems will present a major opportunity to drive transformation and value creation





# Hybrid work

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## Operationalizing hybrid work models

Embracing hybrid work will be  
key to supporting organizational  
agility and workforce flexibility





# Hybrid future



**63%**

of the workforce want to  
keep the possibility to  
alternate between different  
places of work in the future

Source:  
JLL, Worker Barometer, 2021

**49%**

of organizations still have  
not developed a 'future of  
work' program

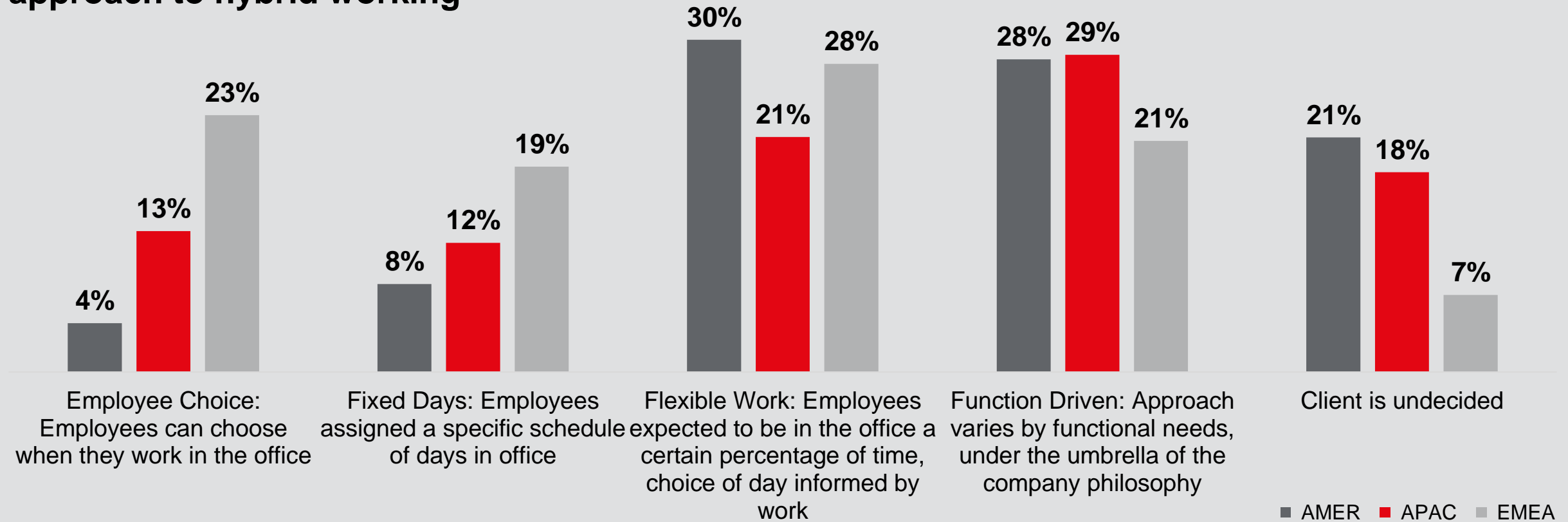
Source:  
JLL, Work Dynamics Pulse Survey, October  
2021



# Hybrid future



**Organizations appear to be consolidating around a ‘percentage of time’ or ‘function-driven’ approach to hybrid working**



\*Respondents who answered “Other” or “N/A (client doesn’t anticipate having any ‘hybrid’ employees)” are not shown.

Source: JLL, Work Dynamics Pulse Survey, October 2021

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Undertake intensive experimentation and piloting to control the degree of flexibility required and to make hybrid work.

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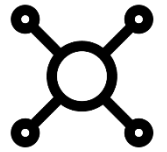
# A flexible future

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## A new landscape of flexible office models

Flexibility will be an essential driver of agile and adaptive office portfolios





# A flexible future

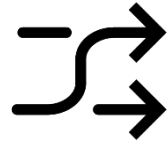


Occupiers are using flexible space to achieve real estate objectives



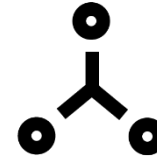
## Cost reduction

Reduce occupancy costs and drive greater efficiencies



## Agility

Buy time while launching new initiatives



## Innovation and collaboration

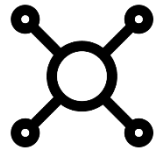
Foster innovation through greater employee interaction



## Talent attraction

Quickly enter new markets

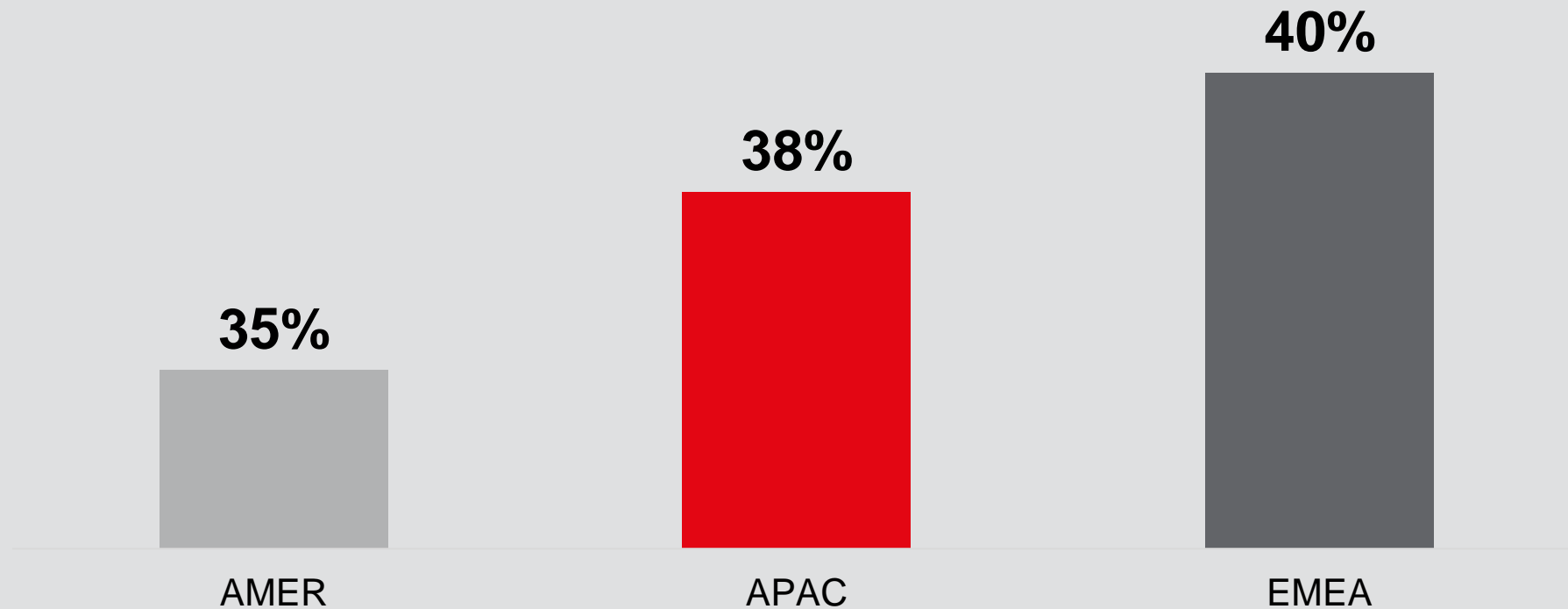
Source: JLL, The Future of Flex, 2021



# A flexible future

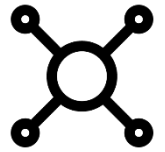


**% of organizations looking to increase their use of coworking/flex space post COVID-19**



Source: JLL, Work Dynamics Pulse Survey, October 2021

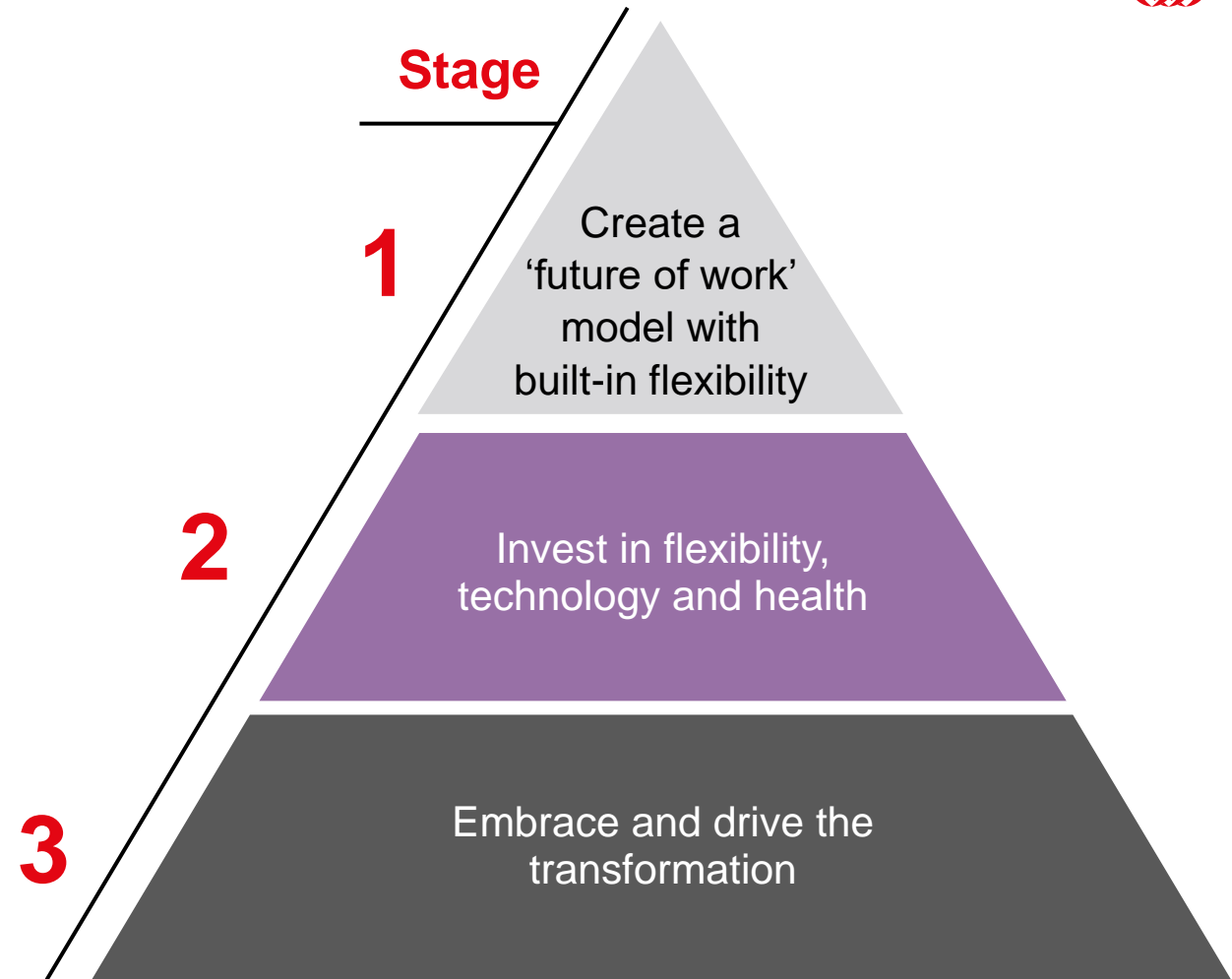




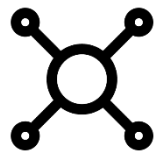
# A flexible future



## Three stages of transformation



Source: JLL, Work Dynamics Pulse Survey, October 2021



# A flexible future



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Integrate a flexspace strategy into your office portfolio to make hybrid work, increase agility and support workforce mobility.

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# Thriving workforce

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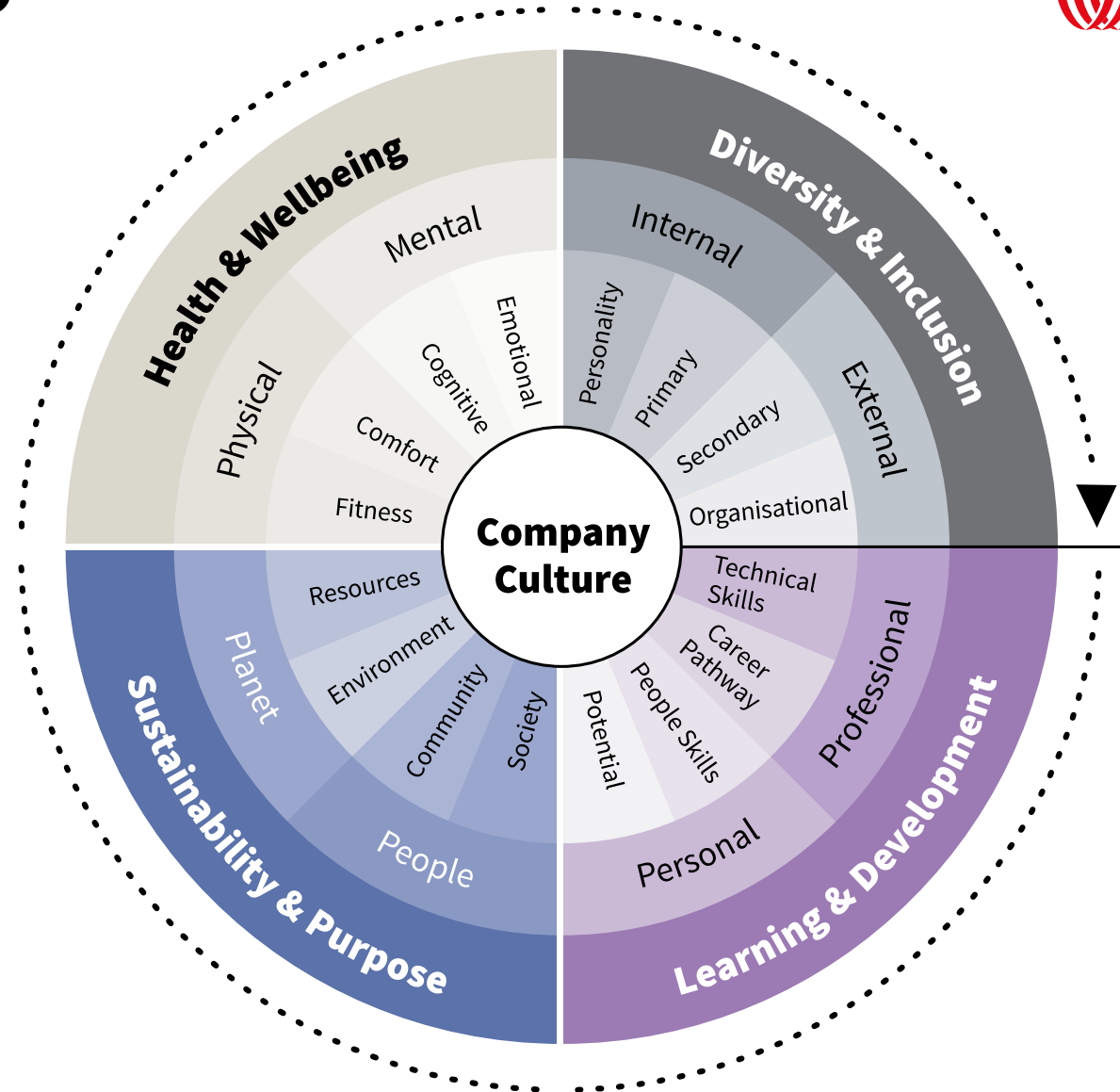
A workforce that feels energized, valued and productive

Nurturing talent through human-centric workspaces and workforce strategies will gain prominence





## A holistic approach to the employee value proposition



Source: JLL, 2021

**73%**

of the workforce aspire to new 'human' places (places that promote healthy lifestyles, safety and wellbeing).

**58%**

of the workforce consider that health and wellbeing programs will make the employer unique in the long term.

**43%**

of the workforce say advanced learning and development programs will make their employer unique in the long term.

Source: JLL, Worker Barometer, 2021

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Create a compelling employee value proposition to attract and retain skilled talent amid increased competition.

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# Regenerative workplace

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A restorative workplace that fuels  
workforce resilience

Tomorrow's workplace will prioritize physical and  
mental wellbeing of people to enable worker  
performance



# Regenerative workplace



**1 in 3**

employees don't have access to any health and wellbeing offerings today.

Source:  
JLL, Regenerative Workplace, 2021

**43%**

of organizations aspire to create places that promote healthy lifestyles, safety and wellbeing.

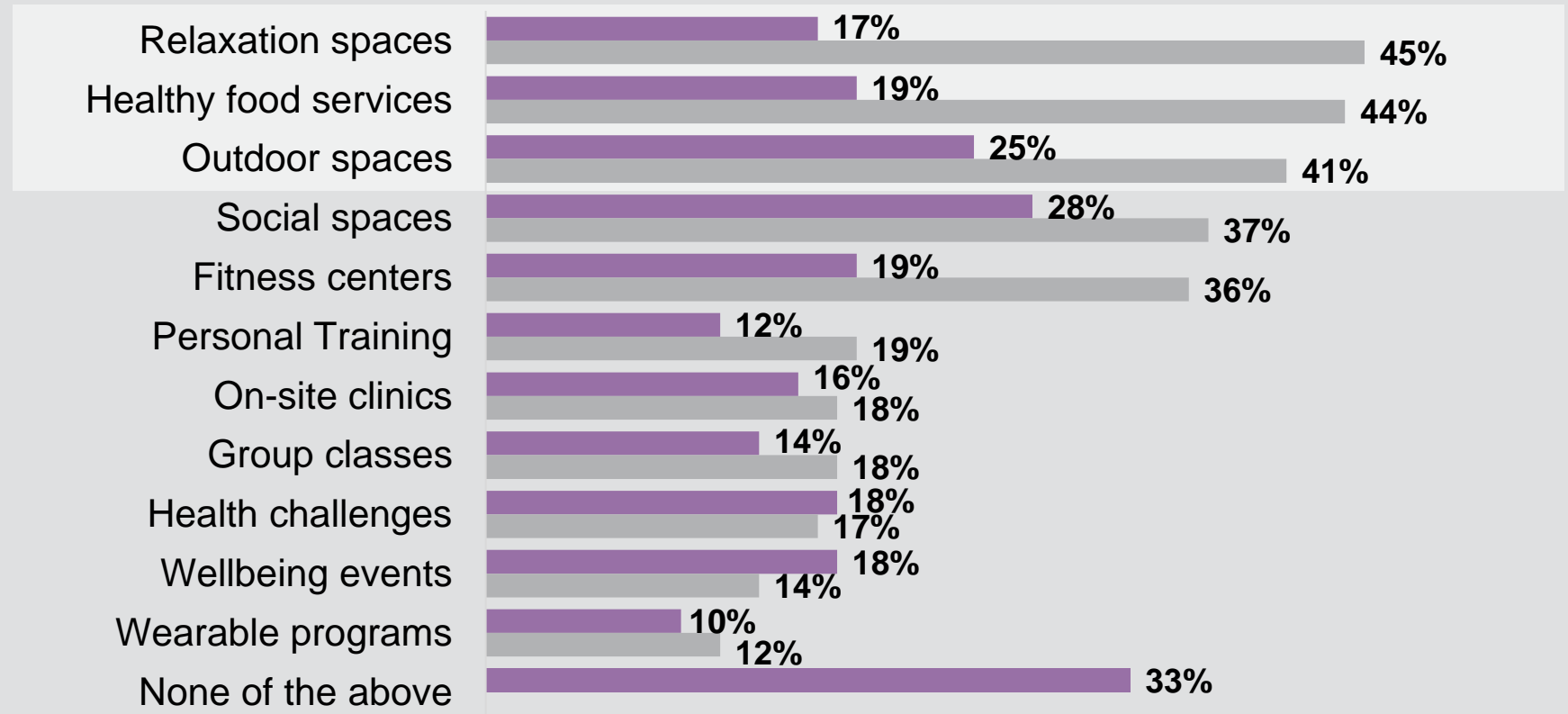
Source:  
JLL, Decarbonizing the Built Environment, 2021

# Regenerative workplace



## Expectations and access to services and amenities

- % of respondents that have access to this service or amenity
- % of respondents naming this as one of their top 3 expectations



**Q. Does your company offer access to any of the amenities and services for health and well-being listed above? Which are the top 3 amenities and services that you think could improve your overall wellbeing the most while at work?**

Source: JLL, Regenerative Workplace, 2021



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Create regenerative workplaces focused on workforce preferences, health and wellbeing and human experience to boost performance.

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# Workplace equity

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Addressing the individual  
needs of a diverse workforce

Diversity, equity and inclusion will be critical  
for talent attraction, innovation and  
performance



Overall employee sentiment on diversity is positive, but negative on inclusion

## Diversity

**52%**  
positive

**31%**  
negative

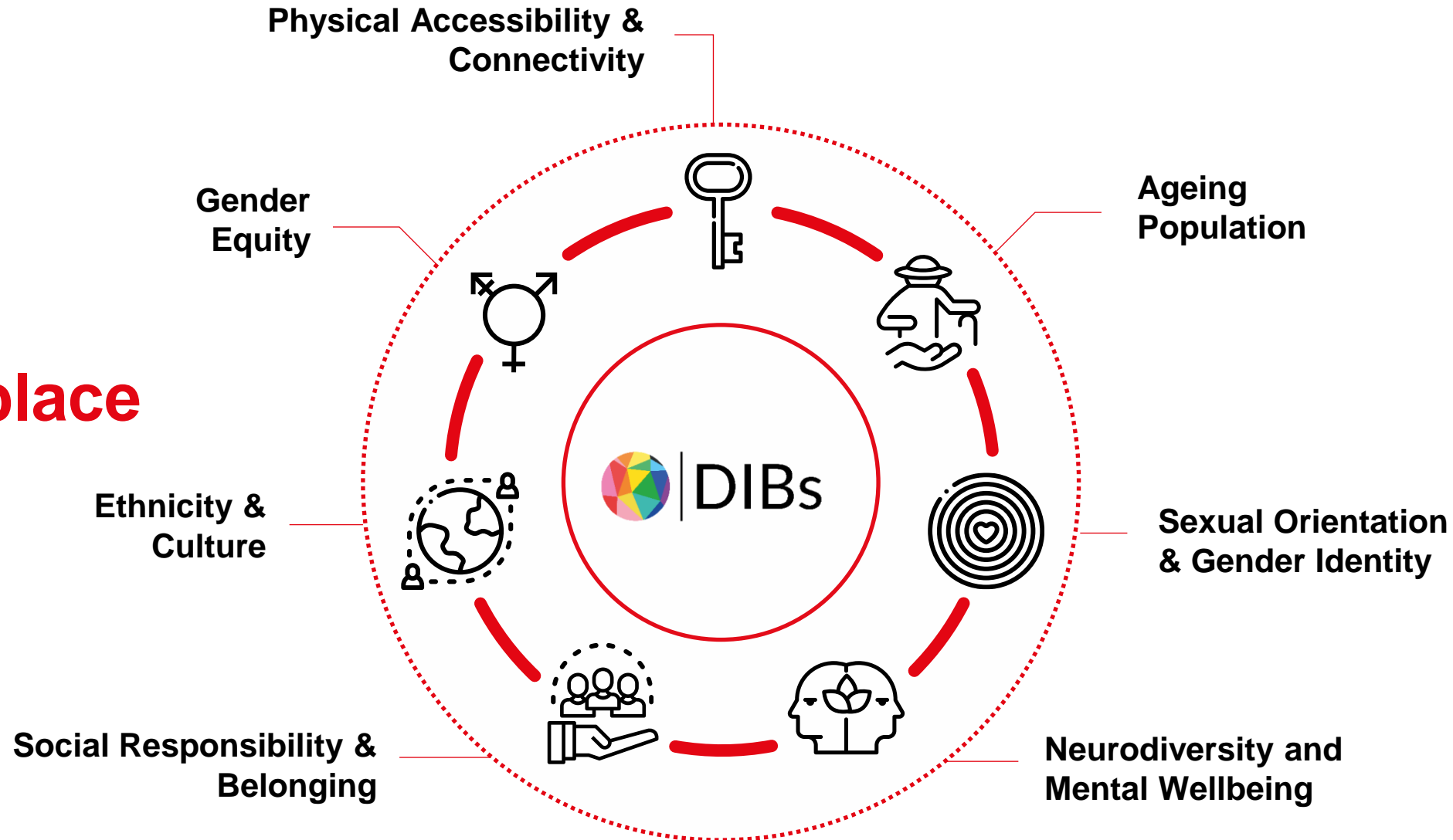
## Inclusion

**61%**  
negative

**29%**  
positive

Source: McKinsey, Diversity Wins: How Inclusion Matters, 2020

## The D&I Workplace



Source: JLL, DIBs Standard, 2021



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Go far beyond minimum design and operational standards and curate inclusive workplaces where diverse talent can flourish.

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# Technology intelligence

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Creative application of insights to power decision-making

Leveraging the transformative potential of big data for strategic planning and decision-making will significantly progress in 2022





# Technology intelligence



**Only 11%**

of executives estimate that 100% of the data provided through IoT devices and/or sensors in their organizations is fully utilized

Source:  
Accenture, Technology Trends, 2021

**Nearly 8 000**

companies offer technology-focused solutions across the built environment globally, an increase of over **300%** in the last 10 years

Source:  
JLL, Transform with Technology, 2021

## Technology applications across the built environment



### City level

- Sustainable buildings & places
- Urban governance & planning
- Healthy places & portfolios

### Portfolio level

- Workplace of the future
- Portfolio management

### Building level

- Acquisitions & dispositions
- Design & construction
- Property & facilities operations
- Leasing & marketing
- Finance & valuations

Source: JLL, Transform with Technology, 2021





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Harness big data to drive real tangible insights and adapt quickly to changing business needs.

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# Dynamic deployment

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Embedding and orchestrating  
flexibility through dynamic  
solutions

Organizations will transition toward digital solutions  
that 'fit and flex' with their organization best



# 53%

of respondents expect their 'hybrid' employees will come to the office at least 3 days a week

Source: JLL, Work Dynamics Pulse Survey, October 2021



# Dynamic deployment



## Operational Occupancy Planning

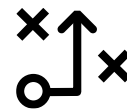
Powered by AI



Suite of holistic solutions to manage occupancy within the built environment focused on optimization while increasing human performance

## Strategic Occupancy Planning

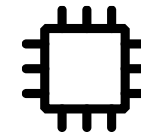
Powered by AI



Space optimization and workplace transformation solutions integrated in the real estate decision-making process

## Dynamic Occupancy Planning

Powered by AI



A revolutionary method to manage dynamic occupancy within the built environment using a digital intense delivery framework

Supports **traditional workplaces** with assigned and shared seating

Supports fluid, **hybrid workplaces** with dynamic seating assignments

← Fixed services →

← Dynamic services →

Source: JLL, 2021



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Leverage real-time data and agile delivery systems to deliver space and services dynamically.

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# Return on sustainability

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Financial, environmental  
and social value creation

Translating sustainability targets into credible  
action plans will drive real impact from real estate



# Return on sustainability



“ *Adoption of Net Zero Carbon is expected to more than double between now and 2025.* ”

Source: JLL, Decarbonizing the Built Environment, 2021



# Return on sustainability



Occupiers today aspire to create places that are:



## **#1 Human**

Promote healthy lifestyles, safety and wellbeing (43%)



## **#2 Green**

Respectful of Earth's resources and acting for the climate (42%)



## **#3 Authentic**

Promote a strong sense of company culture and brand identity (34%)

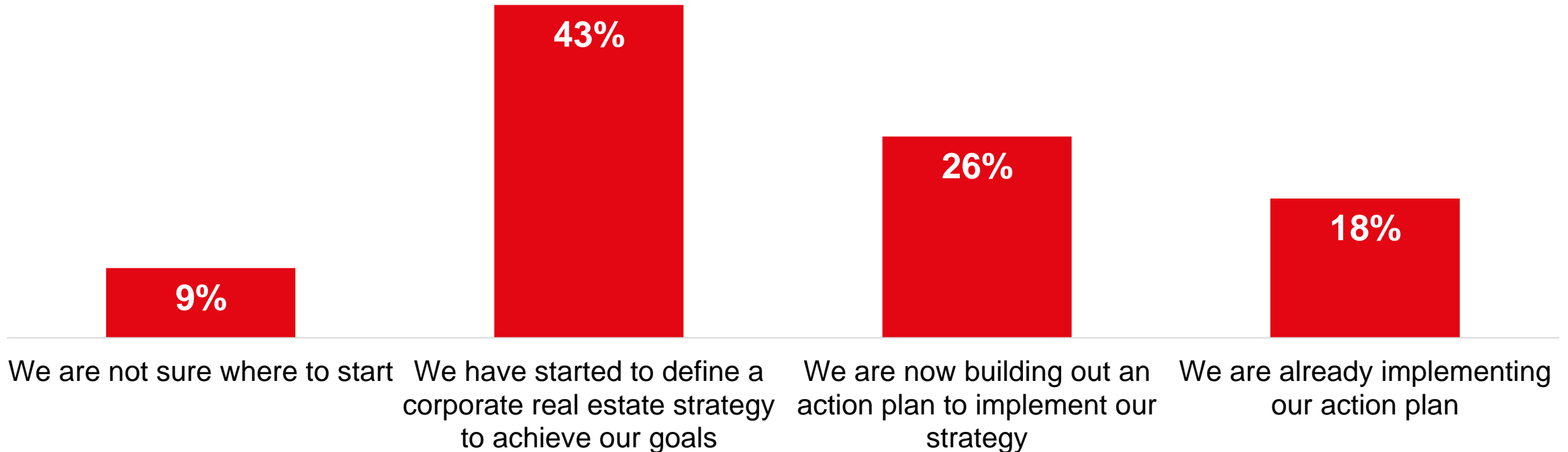
Source: JLL, Decarbonizing the Built Environment, 2021



# Return on sustainability



## Corporate action plans in nascency



Source: JLL, Decarbonizing the Built Environment, 2021

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Design a strategy to translate your environmental and social goals into deliverable actions and create value.

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# Urban transformation

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## Sustainable urban regeneration

The future urban ecosystem will reflect cities' shifting focus on experience, habitat and innovation



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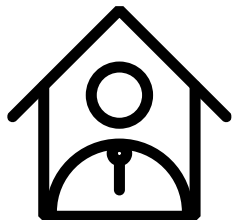
*Workforce and consumer preferences are changing - the real estate industry now has a once-in-a-lifetime opportunity to regenerate the built environment in a sustainable and responsible manner.*

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Source: JLL, Regeneration, 2021

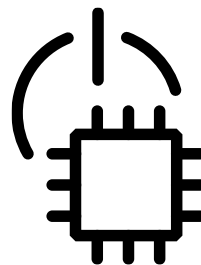


# Urban transformation



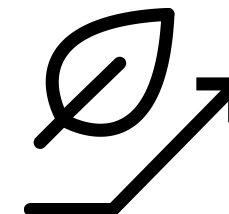
Urban cores will be coming back with new energy and purpose, transforming into places of **collaboration, innovation, creative energy, inclusiveness** and in-person **social** and **business interaction**

Source: JLL, Regeneration, 2021



Small and medium-sized cities are becoming increasingly important in the innovation ecosystem – fostering creativity and offering significant talent pools and an attractive quality of life

Source: JLL, Innovation Geographies, 2022



Buildings account for 60%-70% of greenhouse gas emissions in urban areas, which will mean that cities will double down on **sustainability** and **zero-carbon initiatives**

Source: JLL, Regeneration, 2021

# Urban transformation



**A successful urban ecosystem will need a blend of all three elements**



Source: JLL, Regeneration, 2021

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Align location strategy with the evolving urban ecosystem to identify optimal locations for your business.

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# Partnership ecosystem

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Collaboration to create collective value and achieve common goals

Ecosystems will present a major opportunity to drive transformation and value creation





# ✕✕ Partnership ecosystem



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*The development of an ecosystem of partnerships was already crucial and will be vital in the long run for all its principal players, including the real estate industry.*

Source: JLL, Decarbonizing the Built Environment, 2021

”

# Partnership ecosystem



**83%** agree or strongly agree that the future of their business depends on an ecosystem that fosters innovation and collaboration.

Source: Accenture, Future of Partner Relationships, 2021

**86%** agree that the speed at which business models change today requires companies to work with new partners in new ways to keep up.

Source: HBR, Rethinking Partnerships to Drive Innovation and Business Value amid the New Normal, 2021

**85%** of occupiers agree a strong partnership between cities, investors and occupiers is instrumental in driving the decarbonization agenda.

Source: JLL, Decarbonizing the Built Environment, 2021

**53%** of 'leading' occupiers see partnering with innovation companies to co-create solutions as one of their three biggest areas of investment.

Source: JLL, Decarbonizing the Built Environment, 2021

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Leverage intelligence and best practices from partnership ecosystem to co-create innovative solutions and achieve organizational objectives.

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# Thank you

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