

London Work, Travel, Convene Coalition

# The Office Reimagined: Smart Working towards a Resilient Future

May 2021

“This future of work is not new – it is a path we have been on for many years, and most of its aspects are well-established, from hot-desking and remote working to higher levels of employee well-being and satisfaction.

What is new is the rapidity of transformation of the notion of work.

Trends in the way we live and work have taken months rather than years to become deep-rooted – there is no going back to the old normal.

Workforce preferences have changed, and employers will need to lean into them to win back office workers in 2021.”

**Dr Marie Puybaraud, Global Head of Research for JLL Corporate Solutions**

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66%

66% of employees want to alternate between different places of work (source: JLL)



75%

75% of employees expect advanced services focused on well-being, health, and nutrition (source: JLL)



30% | 56%

30% of organisations have a clear and consistent definition of the future of work, while 56% are actively considering it (source: Aon COVID-19 Pulse Survey, 6th edition: The Future of Work is Now)



83% | 62%

83% of organisations are evaluating remote/virtual working in the context of implementing a future of work strategy, but only 62% have asked for employee preferences (source: Aon COVID-19 Pulse Survey, 6th edition: The Future of Work is Now).

# Introduction

The end of the COVID-19 pandemic will become a defining moment in global history. For most of the population who did not witness World War Two, COVID-19's death toll, coupled with the consequent economic and social upheaval, is the closest comparison the 21st century has. The full extent of the pandemic's casualties is yet to unfold\*, and it may take decades to repair the damage globally.

Amidst the turmoil, organisations had little choice but to adapt to survive. From agile ways of working to more fluid and dispersed labour markets, COVID-19 injected the urgency to act. As the pandemic's grip on the UK finally starts to loosen, firms are now at a crossroads, presented with a once-in-a-lifetime opportunity to build upon hastily established emergency measures and effect lasting change from adversity.

According to Aon's 'COVID-19 Pulse Survey, 6th edition: The Future of Work is Now', only 30% of UK organisations have a clear and consistent definition of the future of work, while 56% are actively considering what theirs should be. Determining what the future of the world of work should look like and shaping guiding principles for a 'new better' are key motivations behind the London Work, Travel, Convene Coalition.

\*See our report: Preparedness: COVID-19 and Pandemic Modelling

Seismic change post-pandemic is inevitable, and firms should harness this rather than have it forced upon them. Global Head of Research for JLL Corporate Solutions Dr Marie Puybaraud's research with global organisations regarding their plans to return to the office found employees' perception of the workplace has altered irreversibly. A return to a prepandemic state is no longer probable nor desirable, and a significant shift in mindset is required to accommodate the hybrid work model of the future.

Any future of work model may be unique to an individual organisation, but, like mental health, vaccines, and pandemic modelling, we can start by asking the right questions.



**Is it enough to reimagine the office, or do we need to reimagine work completely?**

**Consider the four-day week: why not give people choice and apply a resource-orientated model where employees structure their days and where they work?**

**Why do we need to tie people to one job?**

**Could dismantling this belief solve many sectors' talent challenges, allowing for the cross-pollination of talent across sectors?**

**But where to start on a practical level?**  
Workforce change in this environment needs to be balanced and evaluated across three areas:

1

## Manage people risk

(e.g. keep safe and healthy, redeploy talent, assess impact of automation)

2

## Optimise people spend and investment

(e.g. workforce composition, location of talent, rewards spend)

3

## Empower workforce agility and resilience

(e.g. agile decision-making, fluid career structures, T-shaped skills)

# The hybrid model: how do firms manage remote working after COVID-19?

Planning for a return to the office requires some tactical considerations – one of which focuses on who firms bring back to the office first. There are clear roles that need to be in the office to achieve optimal performance. However, some roles do not require team interaction or system access and could undoubtedly be based remotely. Working from home and remote working are not new, and yet not all organisations embrace this way of working. Why? Because we often believe it is harder to manage someone remotely, we assume that teams and individuals work better and are more productive in a workplace environment. What if we could identify the roles that can work remotely – and still be productive? What if we knew who is ‘digitally ready’ – who is agile and curious? What if we knew the leaders who could manage remote teams?

One thing is clear: the hybrid workplace is the future model frontrunner. But it is no quick fix and not something any organisation is going to enter into lightly. It will require a step-by-step approach, and there are some key drivers and enablers that businesses need to activate. The path towards hybrid would take years to implement and enable at an enterprise level. With few keen to be outliers in this field, there is an element of a race to be last, meaning the pace will be more of a crawl than a sprint, with deep-rooted cultural changes required.

At your organisation, among employees who worked on-site in an office setting (full-time or part-time) prior to the onset of the COVID-19 pandemic and who are currently working remotely, what percentage do you expect to return to an office setting (full-time or part-time) once the pandemic is over?

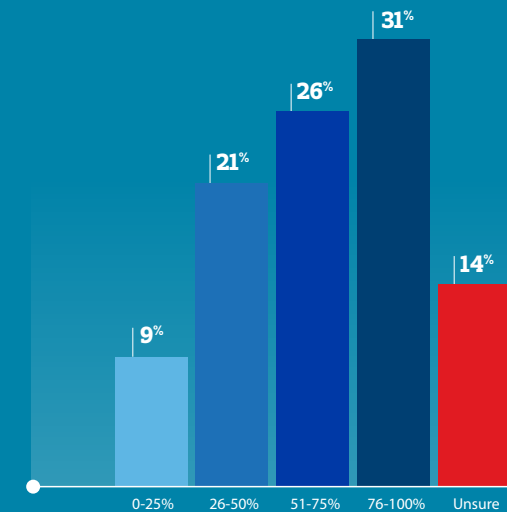


Figure 1 (465 respondents) Source: Human Capital Solutions at Aon

Following the onset of the COVID-19 pandemic, has your organisation taken steps to measure or monitor the productivity of employees working remotely?

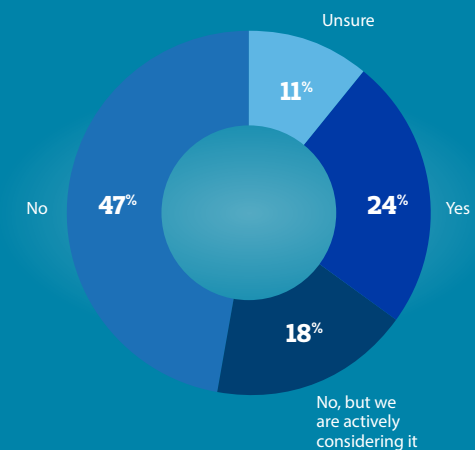


Figure 2 (465 respondents) Source: Human Capital Solutions at Aon

# The future of work is hybrid

## 5 drivers of change:

1. Liquid transformation
2. Digital workplace
3. Health & wellness
3. Hybrid workplace ecosystem
5. Responsible enterprise

## 3 enablers of change:

1. Adaption
2. Elasticity
3. Responsibility

The three enablers in fig 3 may provide a challenging journey, which firms need to keep in mind. Not every organisation has an adaptable portfolio or can easily bring elasticity or that notion of responsibility to the strategy. To navigate the future of work, organisations will need the agility to adapt to new and changing conditions throughout 2021 and beyond. What Smart Working means will continue to evolve – just like our desire to work from home or the office will change alongside life-changing circumstances. Organisations will need to think carefully about the boundaries they set to manage this and maintain consistency and productivity.

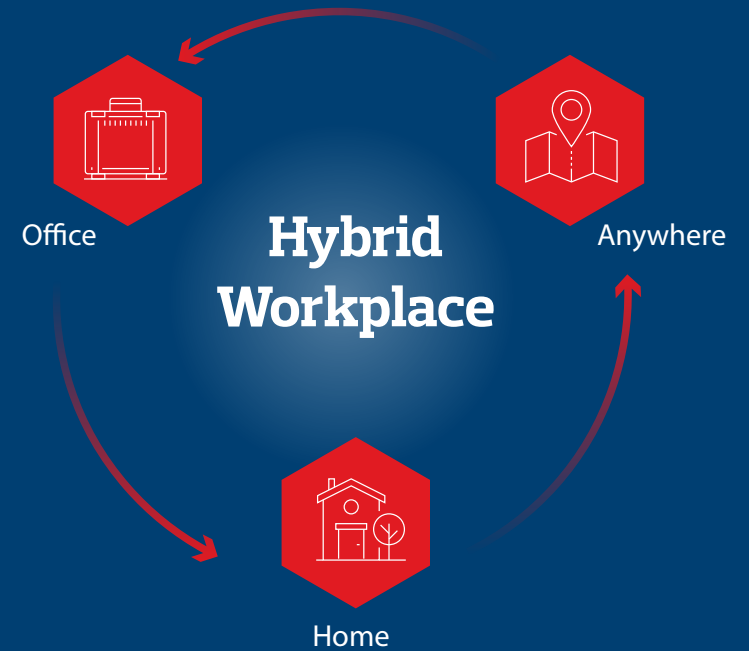


Figure 3 Source: Jones Lang LaSalle IP, Inc. All rights reserved

# Two or three days a week – what's the difference?

How do you enable your employees to work wherever they want, and how do you manage this and orchestrate hybrid work? Incorporating remote working into the future work strategy is essential because employees are leaning heavily towards two to three days a week, on average.

While results varied across industry sectors and geographical location, JLL's recent global survey saw the majority of respondents sit between two to three days, but there is a considerable difference between the two. When the pendulum swings to two rather than three days from home, visibility in the office is 20% higher.

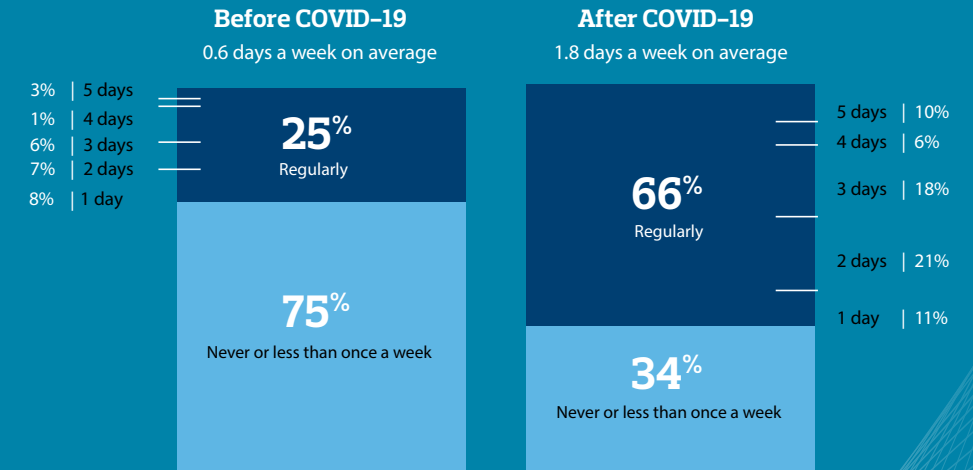
“Anthropologists claim that as soon as we move to three days per week at home, we lose much more touch with our organisations. It feels like a lot of organisations are gravitating towards the maximum of two days per week,”

Dr Marie Puybaraud says,

“But the reality is here; we will need to accommodate a workforce with a different expectation about the notion of work. And they also have different aspirations. One of the aspirations they have reported is for more balance and local life. They want less commuting.”

## Work from home

66% of employees want to make it a regular habit, 2 days a week on average



Question: How many days a week would you like to work remotely from home after COVID-19?

Question: How often did you work remotely before COVID-19?

Figure 4 Source: Figure 3 Source: Jones Lang LaSalle IP, Inc. All rights reserved



# Just how flexible should a new model be?

JLL's findings have revealed a very strong correlation between the aspiration to work from home and defining one's own work style, especially around flexible schedules, and (unsurprisingly) 78% of employees would be receptive to switching to four days.

COVID-19 has prompted all organisations to rethink their workforce models. Most organisations want to explore more creative ways of curbing expenditure, driven by a desire to protect jobs and people. In short, they are rethinking how their workplace operates and are building different scenarios and hypotheses to test. If we take the four-day working week as an example, how do we create a win-win situation for the organisation and the employee?

The focus should be on designing an attractive model and messaging that people would want to buy into: why would someone choose a four-day working week in the first place? There has to be a culture shift. A shift in the way we think about work and where it needs to be executed. Those companies willing to think of a new model and work through the possibilities are more likely to get the best results for their businesses and workforces.

Question: Some companies are providing new flexibility options to their employees. How appealing are they to you?

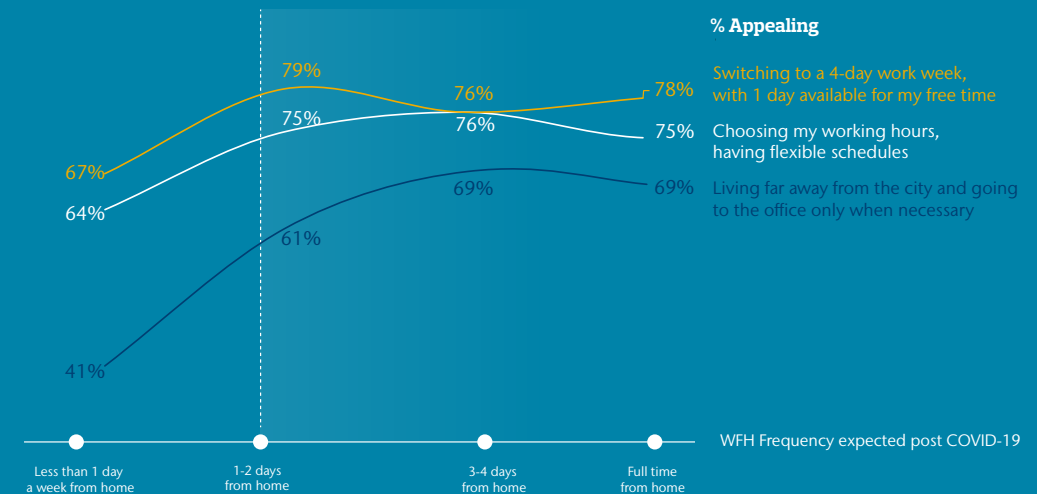


Figure 5 Source: Jones Lang LaSalle IP, Inc. All right reserved



# The office, but not as we know it

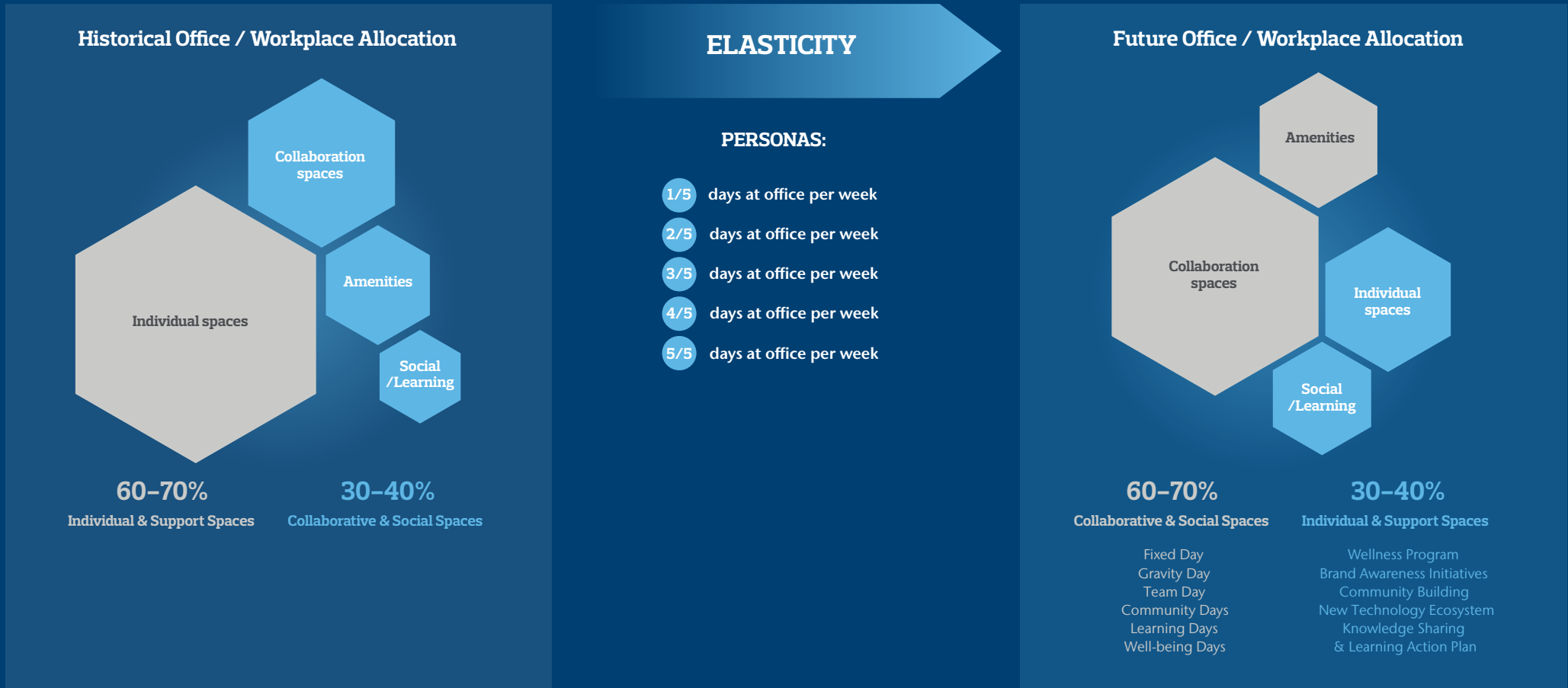


Figure 6 Source: Jones Lang LaSalle IP, Inc. All right reserved

# The office, but not as we know it

Workplaces are moving away from a traditional layout (with 60-70% of space dedicated to individual and support spaces and 30-40% for collaboration) towards a trend for committing up to 70% of space to collaboration and 30% towards individual activities, according to JLL's research.

There is no denying that this is a significant shift, and it is probably not feasible for everybody. Dr Marie Puybaraud observes that any change is still conceptual at the moment – very few firms have taken the plunge towards the future structure. In reality, many are stuck between the two models, expending their energies on understanding the new profile of their workforce.

Dr Marie Puybaraud predicts technology will play a significant role, and JLL is currently researching a new application to orchestrate a day in the life of a hybrid worker. She sees this as crucial to building a future structure that will work in practice because “having control over where people are, when they turn up at the office, how they use these facilities throughout the day, will be a fantastic way to decode the need within the hybrid workplace model ecosystem”.



# Issues at the heart of a future of work strategy

Which of the following issues or programmes is your organisation currently evaluating or updating in the context of implementing future-of-work strategies?

(Please select all that apply) (461 respondents)

	Yes	No, but we are actively considering it	No	Unsure
Agile ways of working	67%	17%	9%	7%
Business and/or workforce resiliency plans	58%	17%	13%	12%
Career levelling and/or paths	52%	18%	24%	6%
Diversity, equity and inclusion	78%	12%	8%	3%
Dynamic skills-based proposition	24%	28%	31%	16%
Employee value proposition	51%	26%	13%	9%
Empowering frontline workers	29%	22%	32%	17%
Flexible work schedules	71%	19%	7%	3%
Identifying current or future talent/skills gaps	61%	22%	11%	6%
Location strategy	56%	18%	19%	7%
Manager/leadership training	71%	16%	8%	5%
Optimising people spend/investment	54%	23%	14%	9%

Figure 7 Source: Human Capital Solutions at Aon

	Yes	No, but we are actively considering it	No	Unsure
Performance management	70%	14%	11%	5%
Remote/virtual working	83%	11%	5%	2%
Reshaping or reorganising your workforce	49%	21%	22%	8%
Reskilling/upskilling your workforce	36%	25%	28%	11%
Skills assessment and inventory	32%	27%	29%	12%
Talent mobility	45%	23%	23%	9%
Total rewards optimisation/strategy	57%	21%	17%	5%
Training and development	64%	20%	10%	6%
Travel policies	44%	18%	27%	11%
Wellbeing (i.e financial, health and/or mental)	76%	14%	7%	3%
Workforce use of tools and technology	71%	14%	9%	7%

Figure 8 Source: Human Capital Solutions at Aon

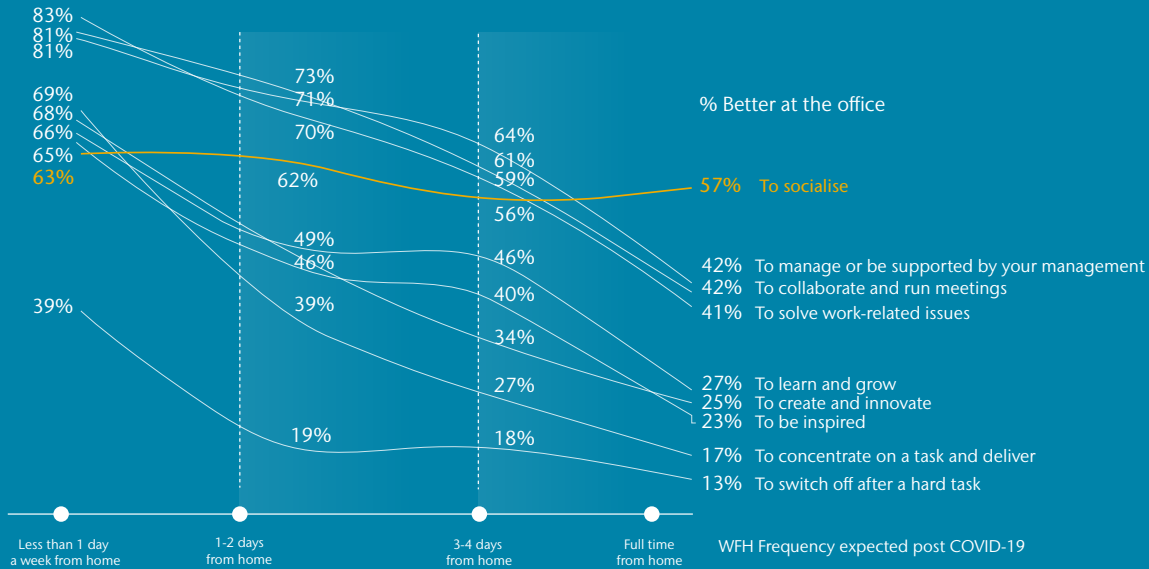
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“Where's the opinion of the workforce in all of this? Consider some competitive industries, like banking. If one bank is open to remote working, it may attract new talent from other banks forcing a return to the office. This is where a lot of the workforce mindset and shifts are going to operate in 2021 because the workforce has choice; choice they didn't have before. Choice about where they want to work, how they want to commute to work, flexibility around their working pattern, and all of that for many employees has no price. The price of flexibility is very difficult to measure. **Once you have it, it is very difficult to take it away.**”

Dr Marie Puybaraud, Global Head of Research for JLL Corporate Solutions

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## The office remains the preferred place to socialise, regardless of the aspiration to work from home



Question: After your recent home working experience, where would you prefer to do the following tasks in the future – At home, in the office or in a third-party place?

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# What role could the office play in the future?

The office is no longer the building where we have to go to work. So what is the new purpose of the workplace? Many organisations hope the office will play a crucial role in identifying brand and culture. In the future, it may be a place to learn, to socialise – a hub for creativity, experience engagement, as well as health and well-being.

Individuals envisage a return to the office focused on socialisation, experience, collaboration boosting performance, and community life. Currently, certain activities are at a disadvantage, like managing and supporting people, teamwork, solving problems, and this is where the office has a real role to play.



At the same time, the pandemic has created working standards, some of which will remain crucial for employees after COVID-19. Heightened levels of cleaning and hygiene are right at the top of employees' agenda, alongside remote working and less dense work environments.

The return to the office will not be as easy as some organisations may expect; it is not just a case of switching on and reopening a physical environment. The psychological step of return to 'work', which is strongly linked to issues around mental health, especially around commuting, could be a considerable barrier, and organisations will need to decide how to support their workforce.

"It's difficult for an employer to control commuting time. However, individuals can control meeting times, whether or not to commute, or commute at a different time of the day. That's where a lot of partnership between HR and real estate needs to come into play – how to orchestrate the return to work."

Dr Marie Puybaraud, Global Head of Research for JLL Corporate Solutions

### Some working routines will remain crucial for employees after COVID-19

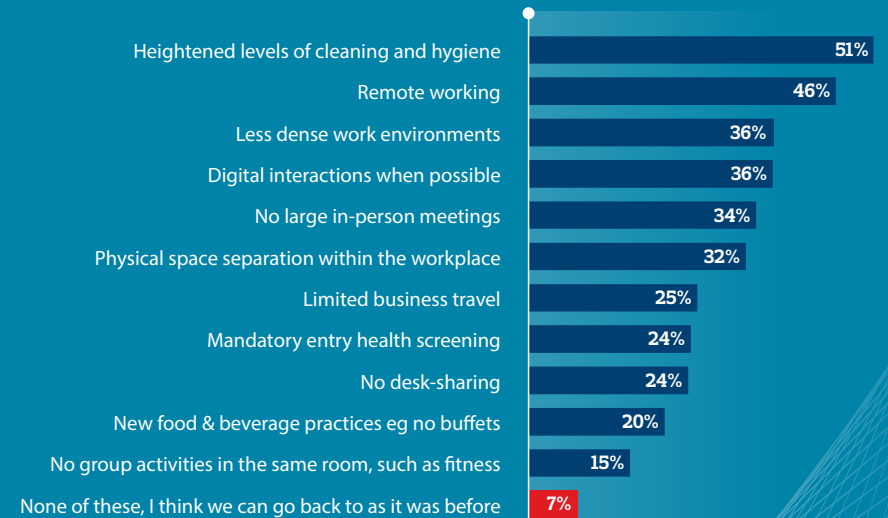


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# How can Smart Working boost workforce resilience?

The more organisations empower individuals, the more they allow them to care for themselves and their well-being. How do organisations boost resilience in their workforce? Spending more on employee well-being is not sufficient. Workforce resilience is the product of investing in the health and well-being of people, creating a working environment in which people can adapt to adverse situations, manage stress and retain motivation. Recent **Aon Rising Resilient** research found that, despite increasing investment, only 30% of employees are resilient. This is a huge opportunity for organisations to do right by their employees and benefit at the same time.

## Resilience =

A fundamental sense of security at work

A strong sense of belonging with the employer

The adaptability and motivation you need to reach your full potential

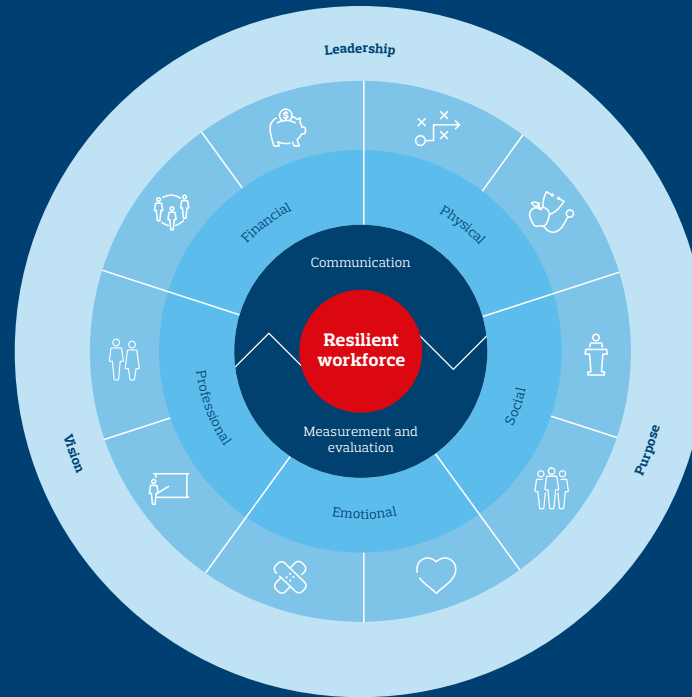


Figure 11

To foster these attributes, organisations need to ensure their approach to well-being incorporates

-  Sharing responsibility and control
-  Developing financial security
-  Fostering adaptable skills
-  Understanding and managing employee expectations
-  Encouraging health-positive behaviour
-  Protecting physical health
-  Delivering clarity and purpose
-  Operating with compassion and engaging community
-  Supporting mental health in the modern day



# Environmental, social, and corporate governance (ESG) & talent

Now more than ever, purpose holds power. Individuals want to understand what an organisation stands for, and firms need to have a clear and authentic ESG message if they're going to attract new talent in the future world of work. Considering the unprecedented talent shortage and employee readiness to switch roles or even sectors, retaining talent is an immediate challenge for firms. Traditionally, the promise of a strong salary directly translated into high workforce engagement, but changing socio-cultural values are contributing to employee disengagement.

Regulators are increasingly focusing on ESG issues, and firms must take action to meet environmental obligations and demonstrate commitment to diversity, equity, inclusion, and climate action. In addition to the climate change conversation, ethical working practices, privacy, and data management are increasingly scrutinised by both regulators and the workforce. Commitment and integration of ESG factors are now hallmarks of sustainability. Social responsibilities should be addressed to develop a working environment where employees feel valued and safe.



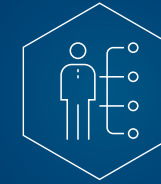
The world in 2025

# Beyond the return to the office

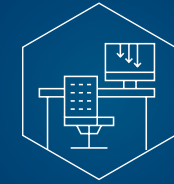
Organisations now rely on a dispersed workforce that is digitally enabled, what JLL calls a liquid workforce that focuses on conscious living. Some firms want to re-focus entirely on the workplace-centric world, while others are desperate to shift towards a completely new model and use the crisis as a vehicle to achieve this.



Work



Workforce



Workplace

## 2020 Workplace -centric world

- Somewhere to go to
- Work from the office and work from home
- Work is tied to a physical location and supported in the cloud

- A static and tech-enabled flexible workforce
- Concentrated talent clusters
- Focus on work-life balance

- A rigid and structured workplace model
- A concentrated footprint – key offices, headquarters
- A collaboration hub

## 2025 Worker -centric world

- Something you do
- Work from anywhere
- Work is not tied to a single physical location and relies on the cloud

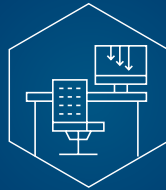
- A dispersed, digitally-enabled, liquid workforce
- Dispersed digital talent
- Focus on conscious living

- A hybrid workplace model
- A flexible footprint - a headquarters and flexible workspaces
- A social hub

Figure 12. Source: Jones Lang LaSalle IP, Inc. All rights reserved

# Employee workplace experiences: the next normal

High-quality employee experience regardless of 'where' employees may work



In-Office



Work-From-Home



Work-From-Anywhere

Commute experience | Meeting experience | Dining experience | Client experience | Training experience

Safe & supported

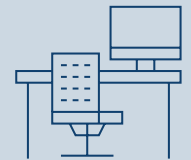
Productive & engaged

Well & empowered

Communal & fulfilled

## The future workplace could look like

A place to learn, connect, contribute, and to socialise.... with amenities and services that merge the boundaries between home life, social life and work life.



# Employee workplace experiences: the next normal

Within the hybrid model, there will be a mix of the three employee experiences (see fig 13), but what is the right mix? That's what organisations should be focusing their discussions upon: understanding workforce dynamics and preferences and then defining the portfolio and workplace. Working from home will probably feature one to three days per week, depending on the organisation.

Firms will have to consider allowing work from anywhere, and that could mean several things. JLL defines hybrid as a flexible way of working that involves sometimes being physically present in the office and sometimes working in a distributed manner leveraging cloud technologies. Although hybrid is an appealing model, it may not be suitable for all organisations, and it may be adopted with different degrees of intensity. We need to look at hybrid through a future of work continuum. JLL defines the future of work as an integrated continuum that includes work, the workforce, the workplace and portfolio.



## **WORK:**

Something you do



## **WORKFORCE:**

Talent-centric



## **WORKPLACE:**

Work from anywhere



## **PORTFOLIO:**

Optimise for elasticity

“In essence, the future workplace will be anywhere and at any time, with the traditional office remaining a hub of social interaction, collaboration and innovation, and one of many instruments to drive sustained human performance, experiences and well-being. Employers will need to care for their employees like they have never done before, especially with regard to their health, wellness and mental well-being, which includes a recognition of the health footprint left by the pandemic.”

**Dr Marie Puybaraud, Global Head of Research for JLL Corporate Solutions**

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# In 5 – 10 years



## Optimise people spend and investment:

As industries shift towards sustainability, science, technology, engineering and mathematics (STEM) programmes are likely to be revived. The investments made in STEM initiatives will engage new generations by guiding and supporting study and career decision-making.

## Manage people risk:

New joiners will be attracted to new technologies and opportunities to fulfil their social responsibilities; their work is literally creating a more sustainable world. For existing employees, the shift towards ESG and digitalisation will provide opportunities to develop new skills to boost career well-being and safety. Aside from individual career progression, sharing the success and growth of the business will boost employee engagement and loyalty.

## Empower workforce agility:

Sophisticated and developmental technology is enabling rapid development of smart cities. Smart cities will provide new opportunities for firms to develop their operating models, demanding new skills from their workforce. Companies will be competing with alternative industries for talent. Although strategies will differ across sectors, total rewards will become key as organisations pivot into other areas.

# In 20 years and beyond



## Empower workforce agility:

The talent curve is likely to flatten as the current challenges are addressed. New technologies and operations will become integral to business models, and firms will seek to fill new roles. The pace of technological development will continue to grow exponentially, demanding new skills from the workforce, which will continue to evolve.

## Manage people risk:

Closer collaboration between the education system and industry could bring alignment to training and education initiatives. STEM initiatives may receive a substantial uptick in investment and support, as changing operations across industries demand new skills in increasing volumes of employees as businesses grow. Certain industries will be increasingly attractive to new joiners, as technology continues to advance, salaries increase, and their role becomes more established as a gateway to fulfil socio-cultural obligations.

## Optimise people spend and investment:

For firms who fail to invest in progression opportunities for their employees, competitors with comparable technology and opportunities and scope will be more attractive, and there may be some exploratory movement in new roles. Building an ecosystem of collaboration across education providers, partners, and even competitors could create a flexible talent pool that can be leveraged in new ways as industry demands change over time.

“Within 20 years, the development of technology is likely to accelerate the transition to automation. As business models change and roles become increasingly automated, different skills will be needed. In preparing for this transition, firms will need to explore whether these new skills are already available within their teams, whether any training will be needed to develop existing skills, or whether new talent will need to be hired. When looking ahead to 20 years' time, digital readiness and our ability to adapt to shifting goalposts will be the difference between success and failure.”

**John McLaughlin, Chief Commercial Officer, Human Capital Solutions, Aon**

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# Conclusion

“This crisis has shown leaders that long-tail risks are the reality. Increasingly they’re asking questions about being prepared. Are we prepared for the next pandemic? Are we prepared for cyber threats? Are we prepared for climate change?”

“During the initial months of the pandemic, many people talked about the new normal. But our clients, over time, have rejected the idea of a new normal. A new normal isn’t good enough.

“So we coined the phrase ‘new better’. The new better is how you connect, how you innovate, and how you can change business over time. Our clients want to know how to define and achieve the new better.

“Our role, then, is to help them meet this idea of a new better, this year and in the future.”

## **Greg Case, CEO, Aon**

Harnessing the opportunity to shape the future world of work must start now, and transformation should be panoptic. Organisations must resist the urge to work in silos, on pockets of progress concerned only with real estate and location. While the future is still far from certain, one likely truth is that this chance won’t come around again. Change must be employee-centred, and businesses need to strike the right balance with organisational development to hit the ground running and retain and attract talent in the future.



## What is the London Work, Travel, Convene Coalition?

The London Work, Travel, Convene Coalition launched in September 2020. It brings together large employers in the City and Canary Wharf to share key learnings and insights related to planning and operations, to assess impact and measurement of efforts and to evaluate the latest technologies. The coalition's aim is to develop a set of guidelines to help navigate the challenges businesses face as society re-opens throughout the recovery phase of the COVID-19 pandemic.

Founding members of the coalition include, Accenture, Ashurst, Aviva, Clyde & Co, JLL, Legal & General and others. Member roles range from Chief Operating Officer, Director of People Services, Director of Employee Experience, and Future Workplace Director.

Other coalitions worldwide include Chicago and New York, Dublin, and Singapore.

If you would like to find out more about the coalition, please contact The London Work, Travel & Convene Coalition Team [[LondonWTC@aon.co.uk](mailto:LondonWTC@aon.co.uk)]

## About Aon

Aon plc (NYSE:AON) is a leading global professional services firm providing a broad range of risk, retirement and health solutions. Our 50,000 colleagues in 120 countries empower results for clients by using proprietary data and analytics to deliver insights that reduce volatility and improve performance.

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