

FRAMING HYBRID WORK

2025 REPORT



AREMIS

IN COLLABORATION WITH URBANITE ADVISORS

Version 04.2025

“Tuesday/Thursday peaks are no fatality”

The modern workplace is evolving, yet empty desks, misaligned policies, and inefficient real estate decisions are common.

Well, it doesn't have to be that way.

Why Read This Report?

- **Data-Driven Insights** – learn from industry leaders across sectors.
- **Actionable Strategies** – enhance efficiency and engagement today.
- **Market Validation** – go beyond internal perspectives.
- **Future Outlook** – envision your workplace beyond 2025.

This 2025 version aims to be an even more **practical guide to turn hybrid work into a strategic advantage.**

Xavier Orts, CEO AREMIS Group

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2025 HYBRID WORKING REPORT

Working from anywhere
Hybrid spaces
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Rules
Tools need
Trust Context
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Communication
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Context & methodology

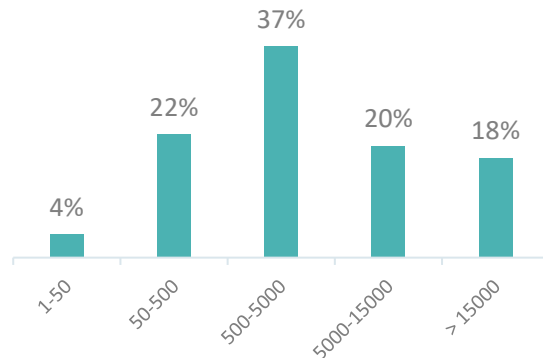
Participants in This Study

5

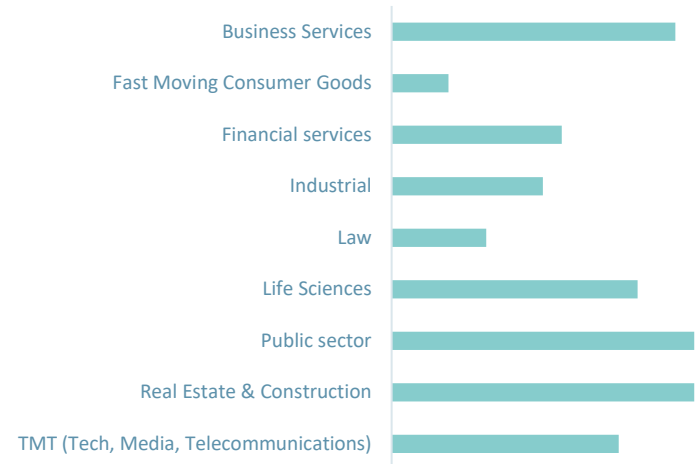
Respondents

- ✓ This survey was completed by **97 companies** across the **EMEA** representing **1M+** office workers.
- ✓ The median company size of our panel is **2.7K** collaborators.
- ✓ Compared to **2024**, this sample includes a broader mix of sectors and larger companies, offering deeper insights into the evolution of hybrid work.

Distribution by
COMPANY SIZE:



Distribution by
SECTOR:





“We need to know when people
will come to the office”

Why it matters

Key Findings

The questions we had and
the main answers we
received



The hybrid working landscape

- Why does hybrid working remain a challenge despite being the new normal?
- What are the key lessons companies have learned?

Decision-Making & Policy Adjustments

- Why is full flexibility no longer the norm?
- How do companies decide when employees should come to the office?
- Was too much flexibility a mistake?

Technology & Workplace Optimisation

- What are the essential tools for managing hybrid working effectively?
- How can companies use data to make more informed decisions about office usage?
- How do organisations measure office occupancy and employee presence?

Future of Work & Strategic Shifts

- What trends will define hybrid working in 2025 and beyond?
- How are leading organisations rethinking hybrid working for long-term success?
- Is hybrid working here to stay, or will companies revert to full in-office models?
- What are the emerging risks and opportunities in the evolving hybrid workplace?



01 THE HYBRID SHIFT: CONTROL OR FLEXIBILITY?

💡 The big challenge now? Encouraging employees to return to the office. An increasing number of companies are facing challenges with this. 📉 Flexibility is diminishing. HR is becoming more involved. Hybrid work policies are under review. 📊 More tracking, less guessing. 📌 Feels like a shift from trust to control, doesn't it? Our report indicates a more intricate scenario 🚀

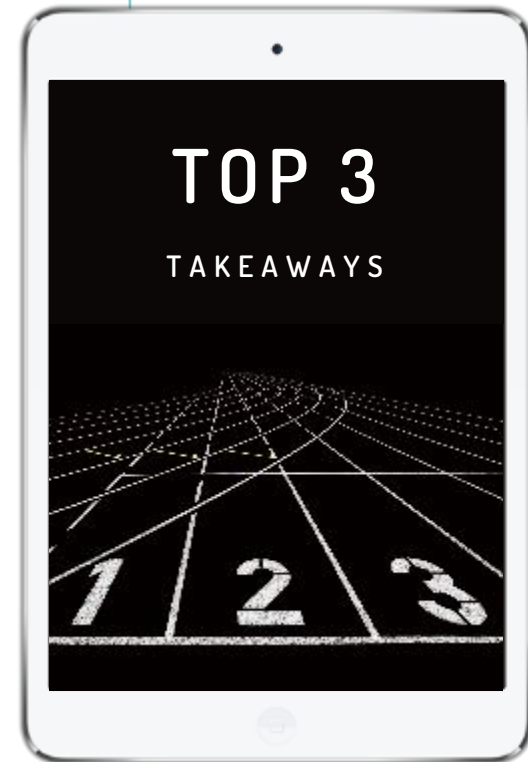
02 WELCOME TO A “SCREW TIGHTENING” ERA?

🔒 Stricter Rules – More mandatory office days, increased attendance tracking. ⚡ One may fear that frustration is rising, leading some to reconsider their jobs. ⚖️ It's a balance, certainly, but – most importantly – it is a matter of leadership.

03 THE SEARCH FOR THE “LASTING BALANCE”

🏢 The workplace needs to be more than a desk—it must drive purpose, collaboration and engagement. 📊 Time for companies to move beyond rigid mandates?

🔄 Structured Flexibility – the best is in between.



SOLVING THE REMOTE WORK PARADOX



Stricter rules are necessary
to ensure employees'
freedom.

FINDING THE RIGHT BALANCE

- Defining a **clear** and **structured** hybrid work **policy**.
- Ensuring employee autonomy without sacrificing team dynamics.
- Using data-driven insights to measure employee experience, assess office **occupancy**, and refine both remote work **policies** and workspace **design**.
- Implementing effective tools and processes to facilitate compliance without excessive **rigidity**.

EXAMPLES

- **Fixed** and **floating** days: E.g. one or two fixed days for everyone + flexibility on the other days.
- **Minimum availability** during the day.
- Attendance is mandatory for certain **key moments**: strategic meetings, workshops, onboarding, etc.
- **Declaration** of presence integrated into Teams.
- A specialised tool ([ask our experts](#)) to provide the means to organise attendance without too many constraints and to encourage planning.



“Change is about repetition”

[Learn from AXA Belgium](#)

This video is the result of an open conversation between AREMIS and AXA Belgium in the context of a joint participation in an event for ADP HR and is only intended to reflect a common interest in the dynamics of hybrid work.



Analysis

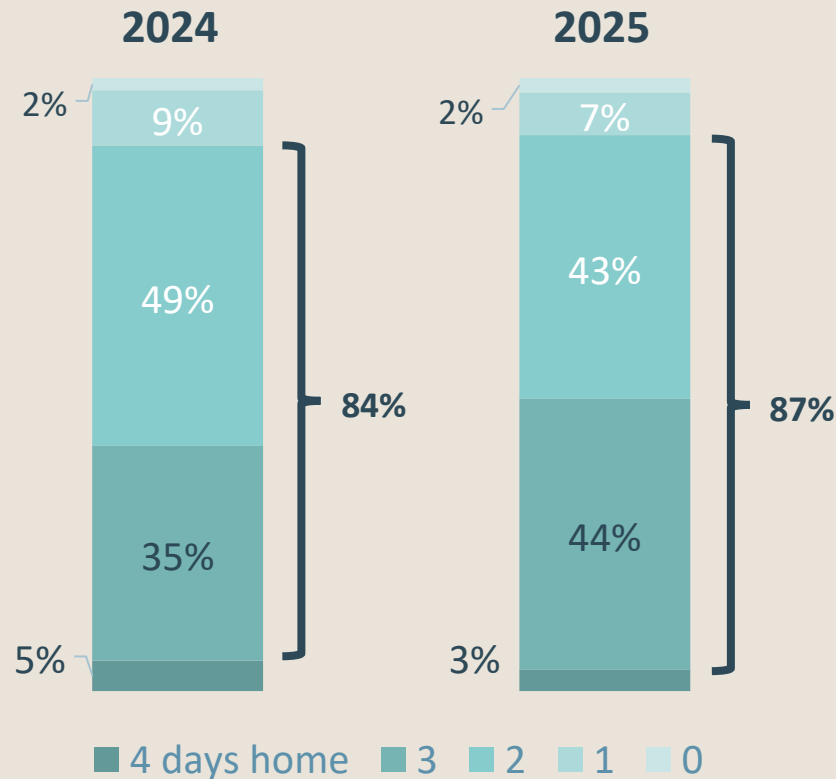
Granular insights from
our study

How often do people stay home

Days/week of remote work

- 🔍 **91%** of companies agreed on a set of **remote working policies** with homeworking allowance
- 🔍 In **87%** of the cases, this includes **2 or 3 days** per week working remotely
- 🔍 The average number of **allowed remote workdays** is now **2.4 per week** (vs. 2.3 last year). The shift indicates a **gradual adjustment**, rather than a radical policy change

13



Who determines office days

Team agreements*

2024



Employee

Manager

Company policy

2025



Key trend:

ca 50% of employees still choose their **office days**, but **team agreements** are becoming more common — shifting **autonomy** from individuals to **structured collaboration**.

*A **team agreement** is a formal shared document that sets clear expectations on **when** and **how** teams work together. It ensures alignment on **office days, collaboration, tools** and decision-making.

How companies leverage tech for hybrid work

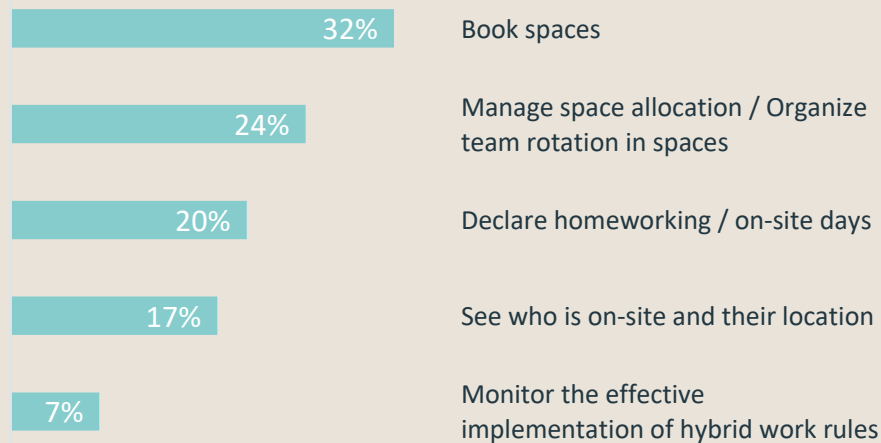
Measurement technologies

Measurement technologies support Hybrid Work Management

It is not just about tracking attendance: technologies help **structure hybrid work policies** and enhance flexibility.

Companies **use technology for both compliance and workplace optimisation**, not just for control.

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36% of companies take advantage of technology to support hybrid work

How companies measure occupancy

Understand on-site attendance

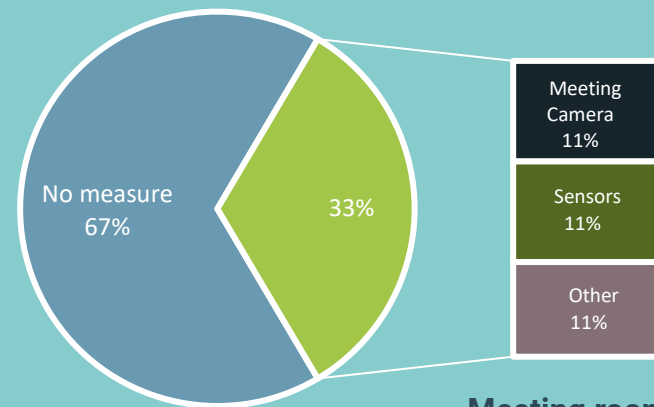
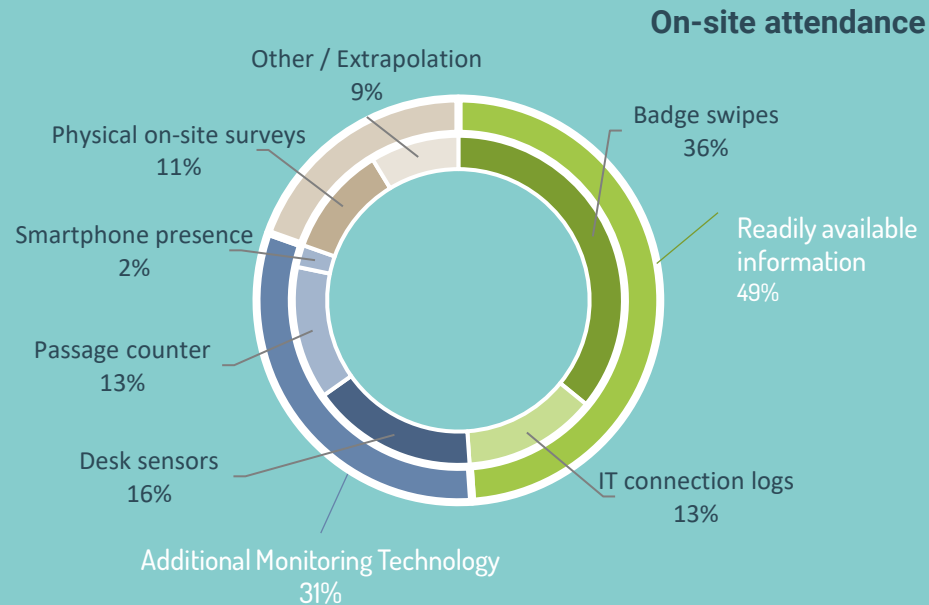
Key trends:

60% of companies now measure on-site attendance

→ One year ago, it was only **43%** of them

1/3rd of companies now measure the usage of their Meeting rooms

→ Last year, they were only **15%**



“The result has
been that we are
finally able to **make
decisions...**”

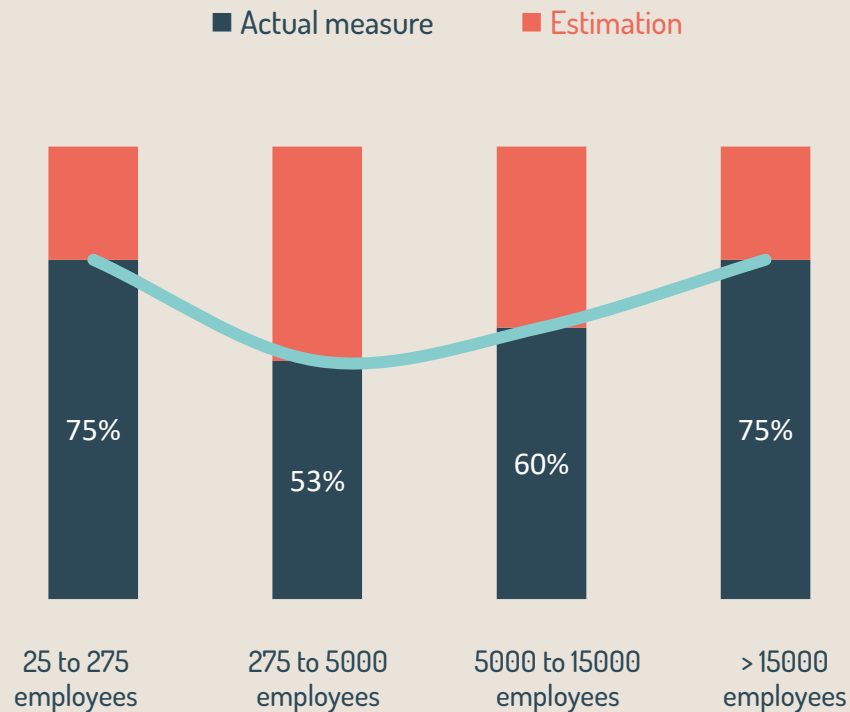
Kris De Bisschop, DPG



Size matters

Site presence

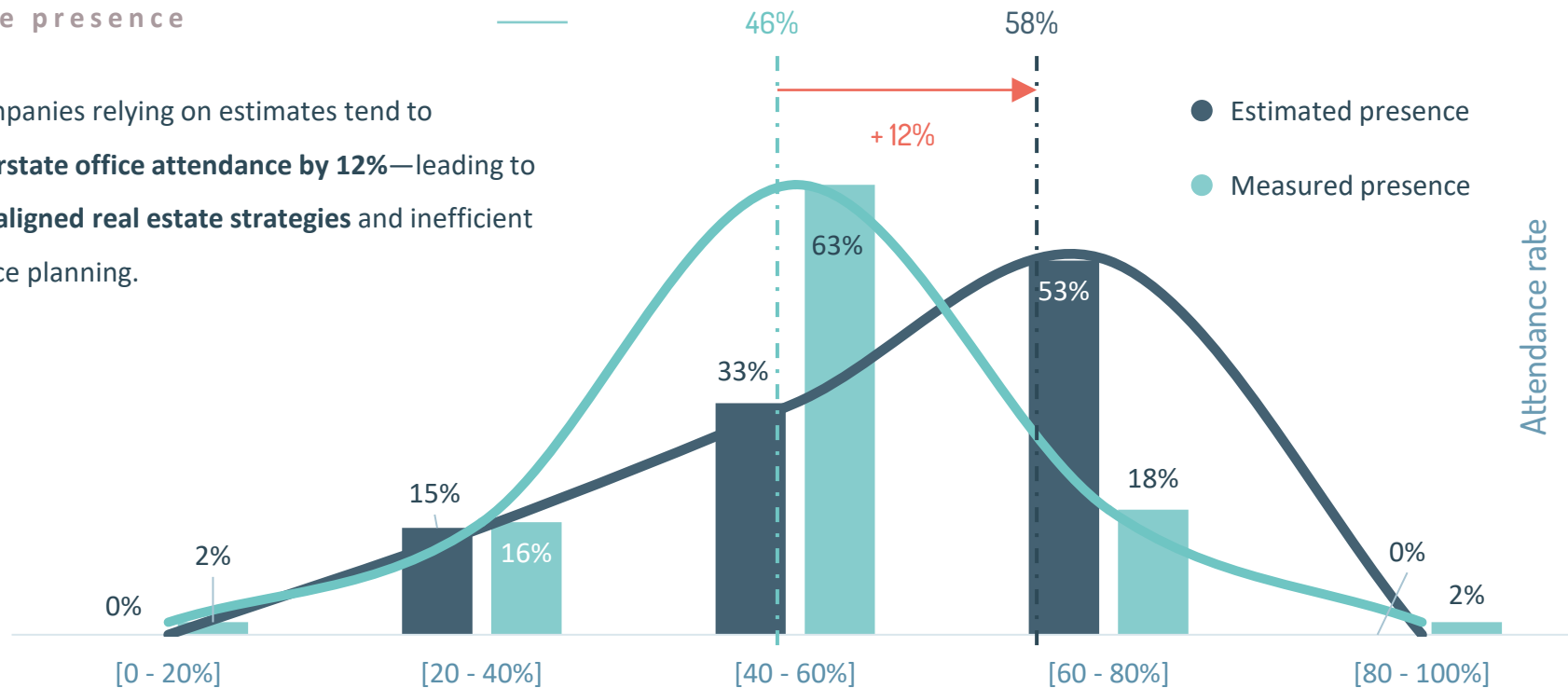
- 🔍 **Large** companies **invest** in tech, **small** companies rely on **intuition** and **manual counting**.
- 🔍 **Medium**-sized firms **struggle** to justify expensive monitoring tools—leading to blind spots in workplace efficiency.
- 🔍 **Size dictates strategy**: large firms optimise, small firms adapt.
Large companies refine hybrid policies using data, while smaller ones adjust organically.



Approximation comes with a cost

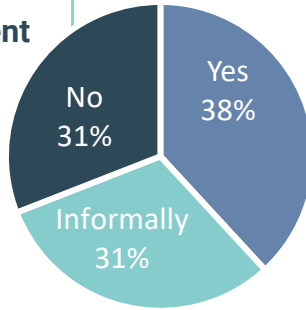
Site presence

Companies relying on estimates tend to **overstate office attendance by 12%**—leading to **misaligned real estate strategies** and inefficient space planning.



Distribution of how organisations assess the office presence

Formal assignment of the desk?

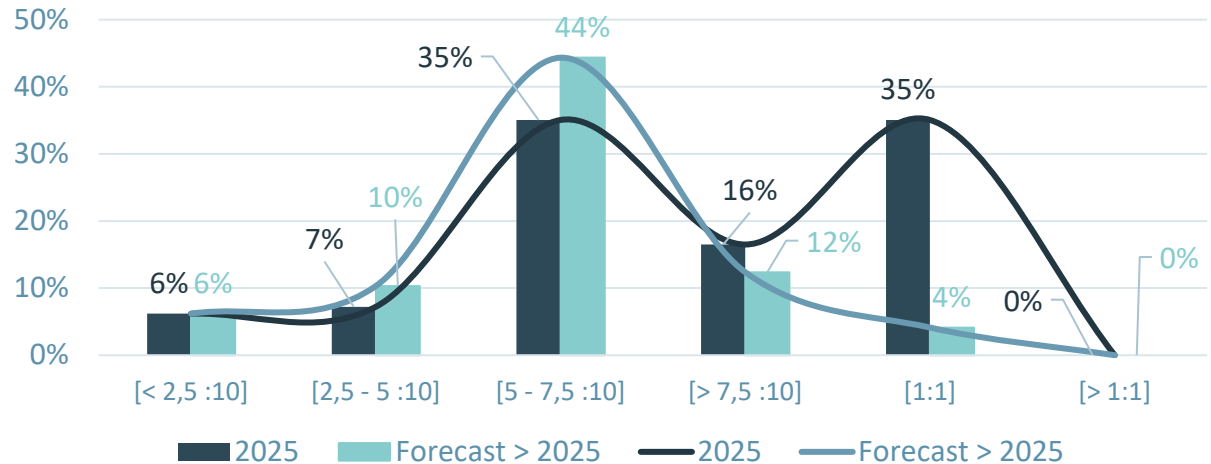


Can they pick their desk?

20
||

Desk sharing policy

- AVERAGE sharing ratio
7.5 desks : 10 employees
- TARGET
6.3 : 10
- Only 4% still plan to keep individual offices (1:1 ratio) showing a clear trend toward space optimisation



Do employees think that this is the right direction?

User experience



The user experience is now measured by **46 %** of companies; last year, it was only measured by 32% of them.



In **91%** of cases, companies measure user experience at least **once a year**; last year it was only 70%

Leesman
index
9%

21



Other
external
survey
11%



Internal
survey
80%

Next steps

What's next and, more importantly, actionable recommendations for you






The upcoming challenges


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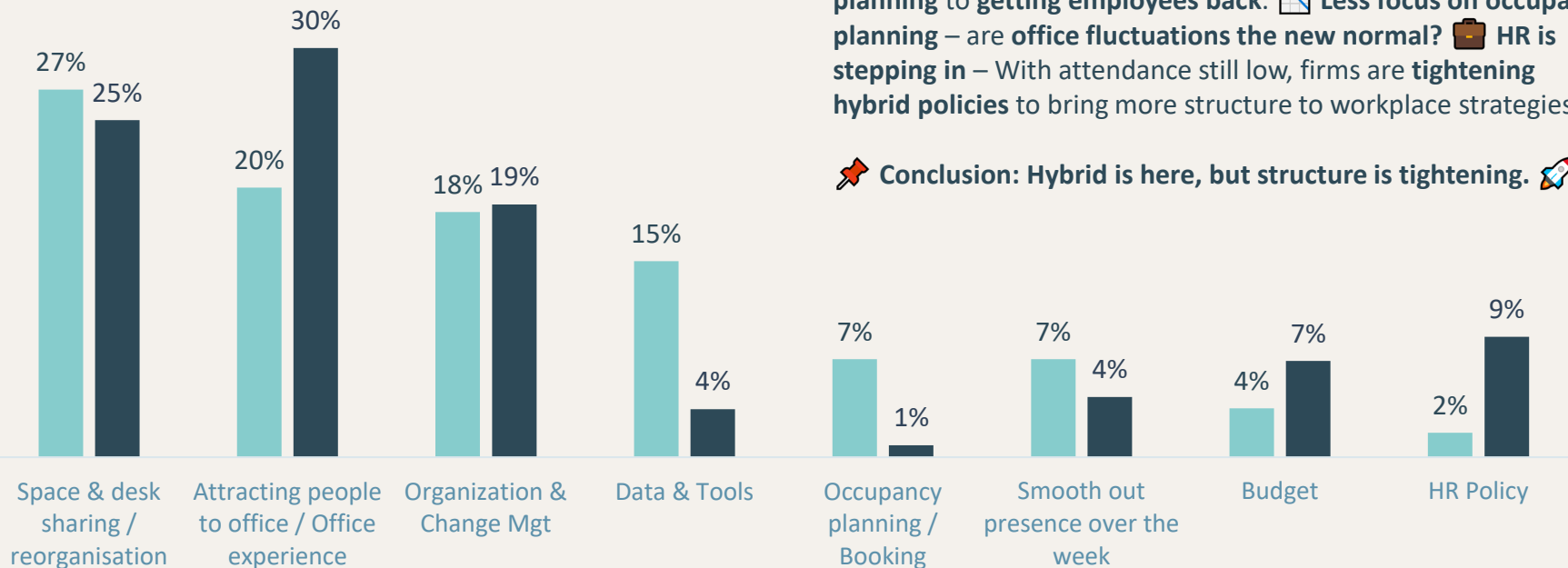


2024 vs 2025

 From Space Optimisation to Attendance

 From desks to people – Companies are moving from **space planning** to **getting employees back**.  Less focus on **occupancy planning** – are **office fluctuations** the new normal?  HR is **stepping in** – With attendance still low, firms are **tightening hybrid policies** to bring more structure to workplace strategies.

 Conclusion: Hybrid is here, but structure is tightening. 



What is the real impact

24



COST REDUCTION e.g. 500 employees

Initial

- **1,1** workstation / employee
- Annual cost of a workstation: 6.700€
- Annual cost $1,1 \times 6.700\text{€}/\text{FTE} \times 500 \text{ FTE} = \mathbf{3.685.000\text{€}}$

Balanced hybrid setting

- **0,6** workstation / employee
- Annual cost of a workstation: 6.700€
- Annual cost $0.6 \times 6.700\text{€}/\text{FTE} \times 500 \text{ FTE} = \mathbf{2.010.000 \text{ €}}$



- **1.675.000€ (45%)**

What is the real impact

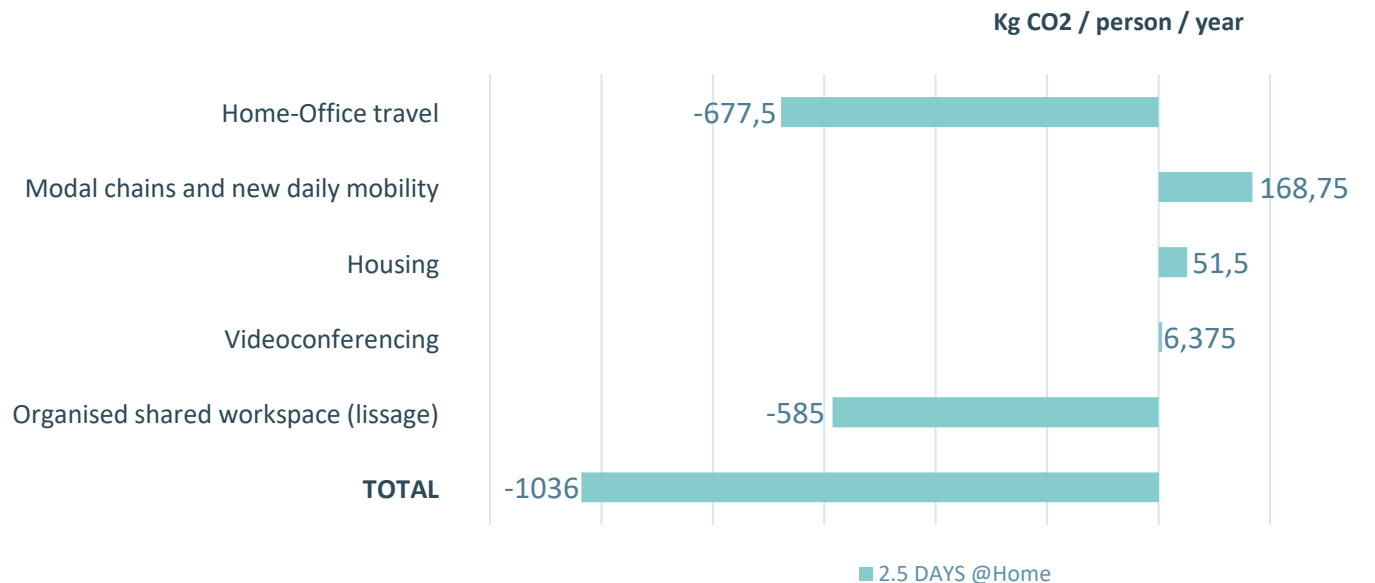
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CO2 footprint reduction

-14.4%

for 2.5 days
on the annual carbon
footprint of an average
European (7,2t eq CO2/Y)

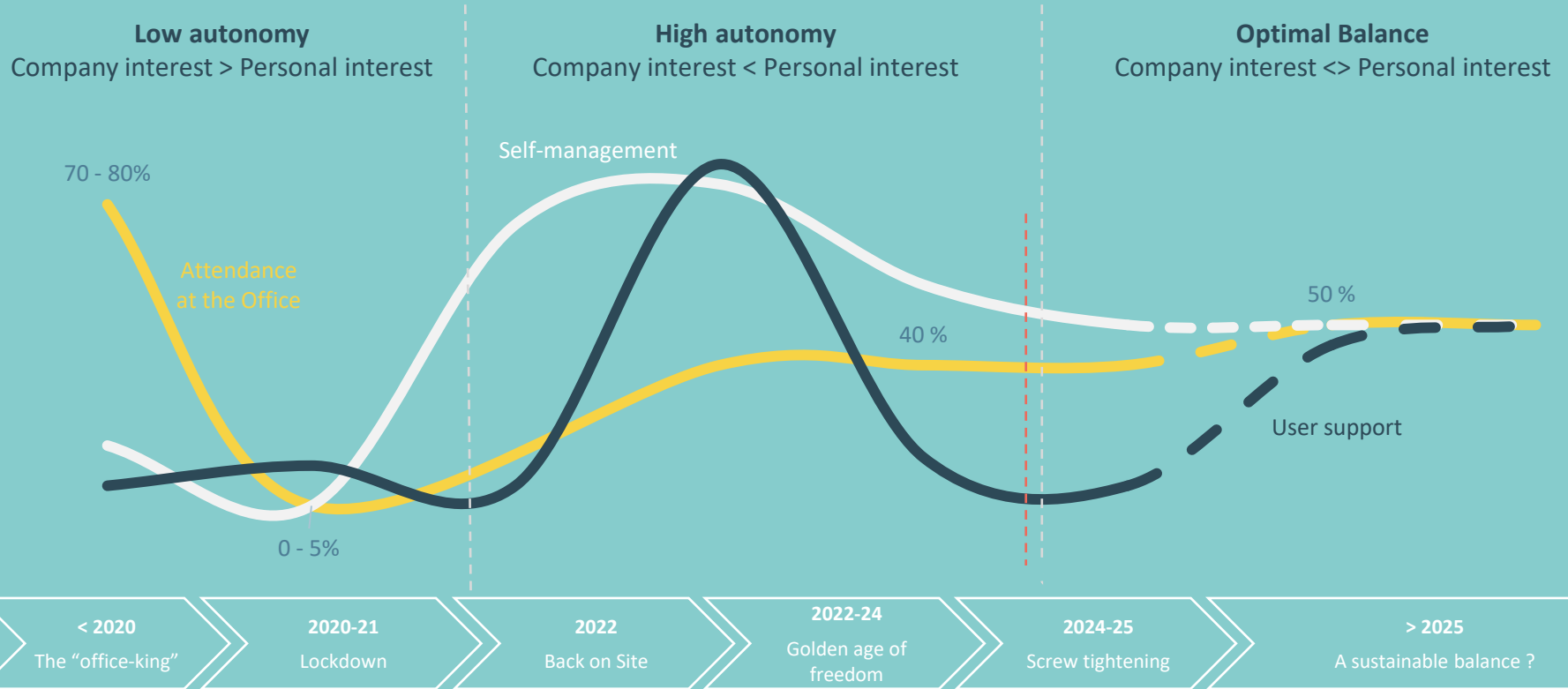


Source [ADEME](#), Eurostat

Where we are now

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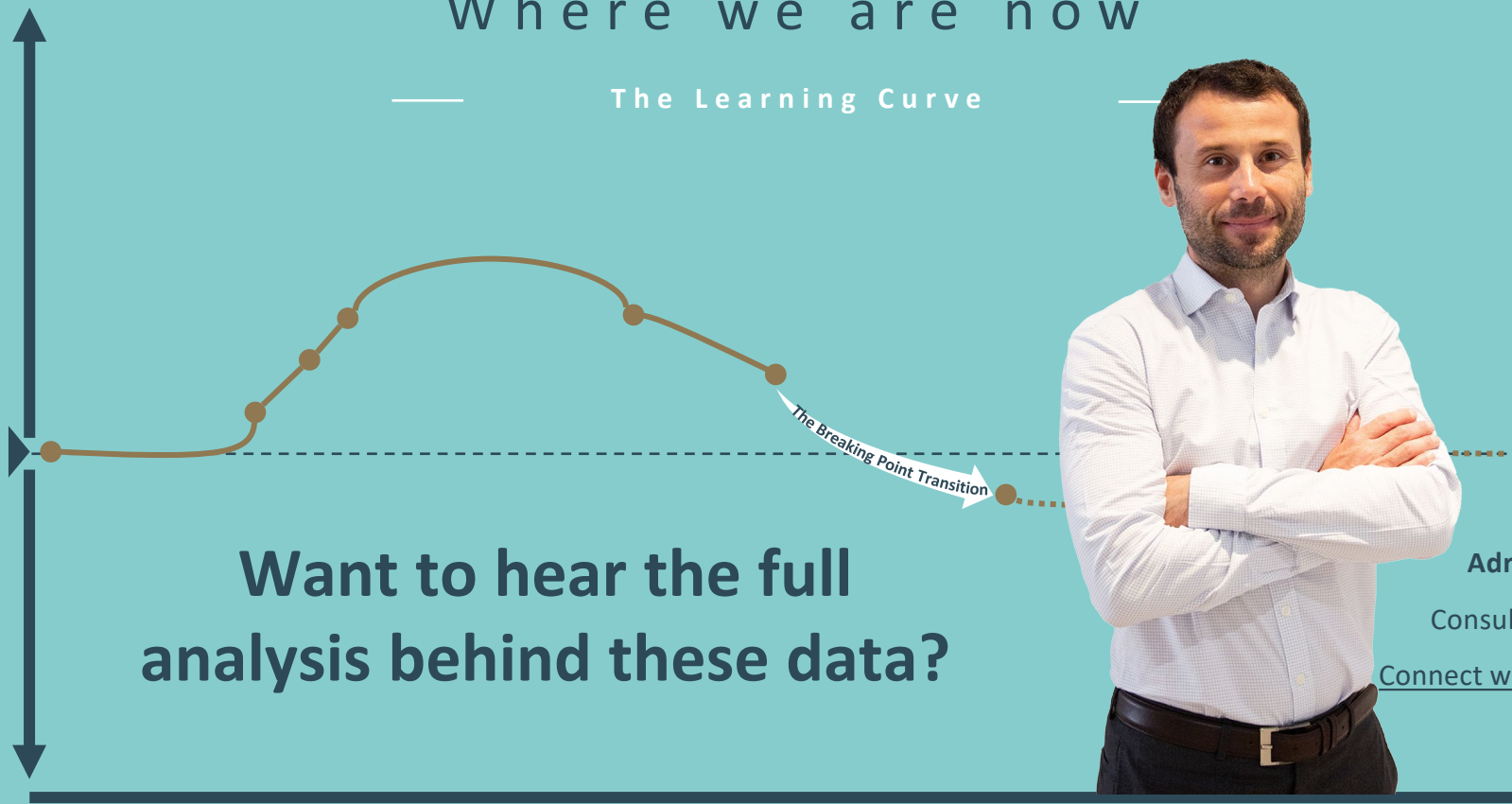
Hybrid bumpy transition



Where we are now

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The Learning Curve



Want to hear the full
analysis behind these data?

Adrien Rospabé

Consulting director

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< 2020

The "office-king"

2020-21

Lockdown

2022

Back on Site

2022-24

Golden age of
freedom

2024-25

Screw tightening

> 2025

A sustainable balance ?

Where are we heading

The next shift?

2024 → 2025 Screw tightening ?



Characteristics:

- Leadership believes they have already offered enough flexibility and now enforce **stricter rules** (mandatory in-office days, attendance tracking).
- Employees feel **increasing pressure** to comply, leading to frustration for some (and branding opportunities for others 😊 -> see pic).



Challenge:

- The **future of hybrid** work isn't about removing flexibility—it's about **structuring it effectively to balance employee autonomy and business needs.**





Follow the leaders

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The KBC case



Belgium



Architecture,
digital, data



10.000 m²

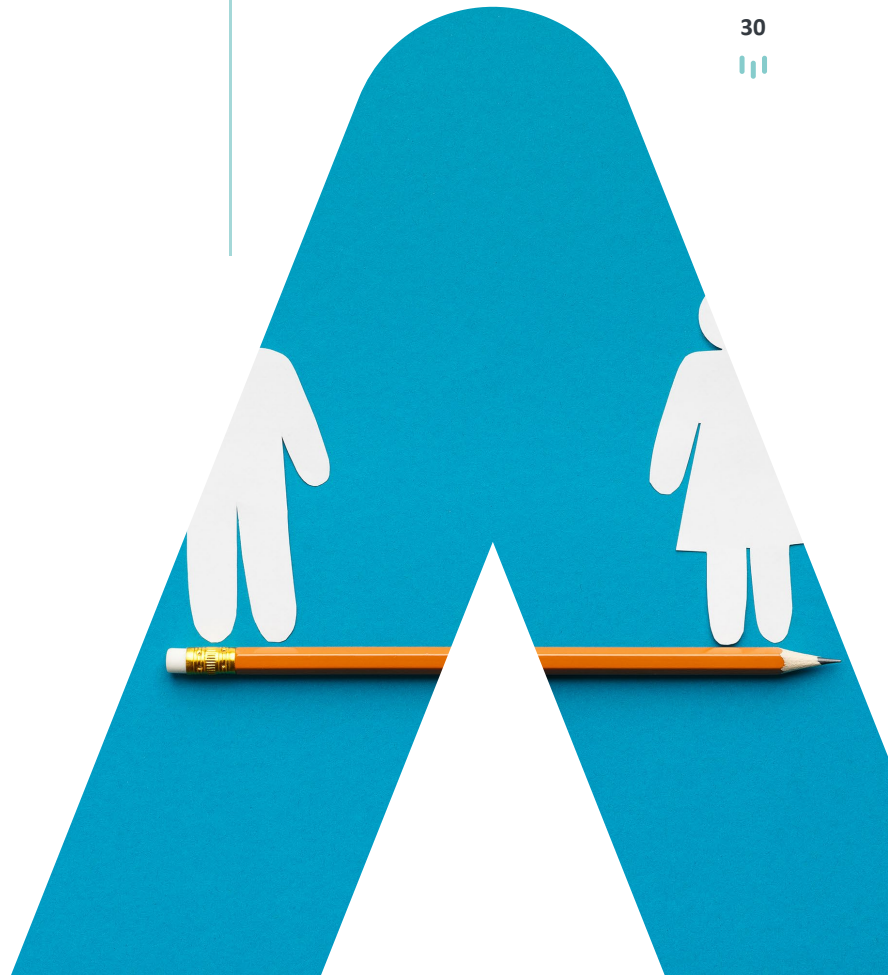
AREMIS guided KBC's transition to hybrid work by implementing **data analysis**, **workplace renovation**, and **planning tools** for real-time space management and effective space utilisation,

- achieving a **1:3 desk-to-employee ratio**
- optimising over **10,000 square metres** for collaboration

Where are we going

Lasting balance?

- Hybrid work is **stabilising**, but will companies win the next challenge (i.e. making it work more efficiently)?
- A space for collaboration and social interaction rather than just a workstation: will the **office** regain a **distinct purpose**?
- Companies must move beyond policy changes to **measuring success, improving collaboration, and reducing inefficiencies**.
But what's the very next step in front of them?



AREMIS

Unleash your workplace potential.

Ready for the next step?

READINESS ASSESSMENT SURVEY





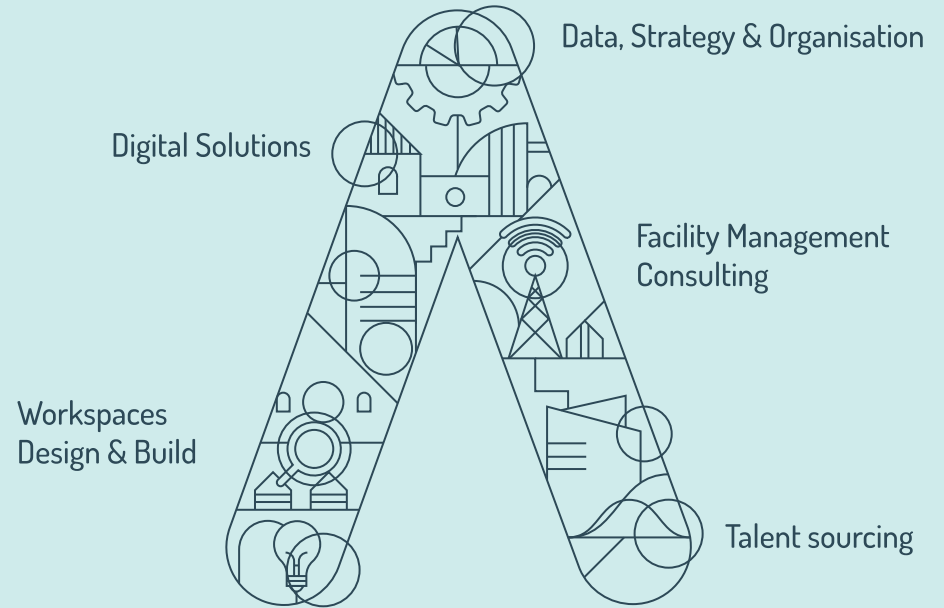
About AREMIS

Who we are and why you
can rely on our
expertise

An experienced hybrid working sherpa

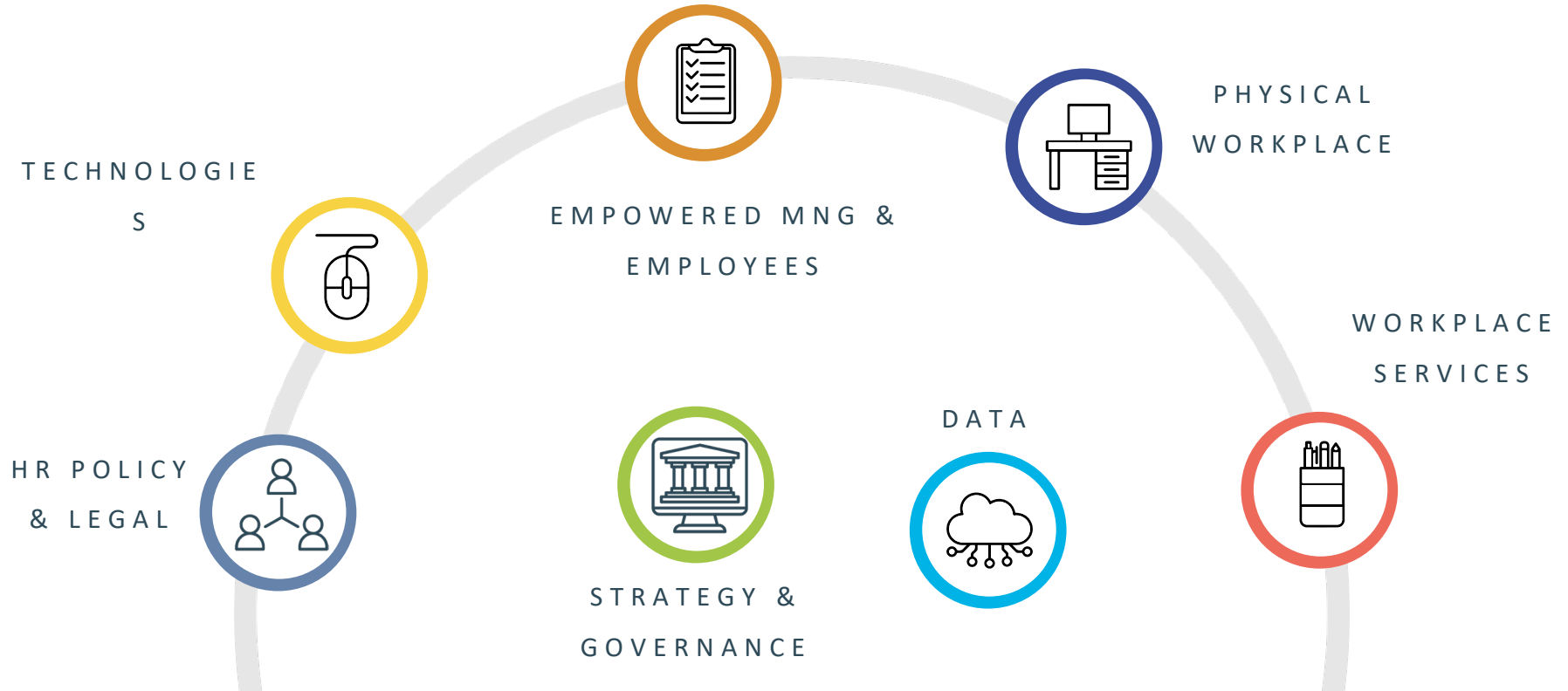
Mission

At AREMIS, we **advise** and **support** you to **imagine, implement** and **increment virtuous** and **efficient workplaces & real estate**.



Hybrid Working in

7 PILLARS



— The virtuous hybrid work —

DEPLOYMENT & GOVERNANCE

CORPORATE VISION & AMBITION

(as is situation)



INPUT

HYBRID WORK VISION & STRATEGY

(by Top Management)



IMPACTS

EMPLOYEES & ORGANISATION

Best practices,
services, tools, etc.



Occupancy & Experience DATA



REAL ESTATE & WORKPLACE

Real estate master plan, activity-
based workplace concept



Our valued clients

Across Europe





+65 millions of m²
of managed space

+320 clients
trust us

+32 years of
experience

+160 talents, consultants
and experts

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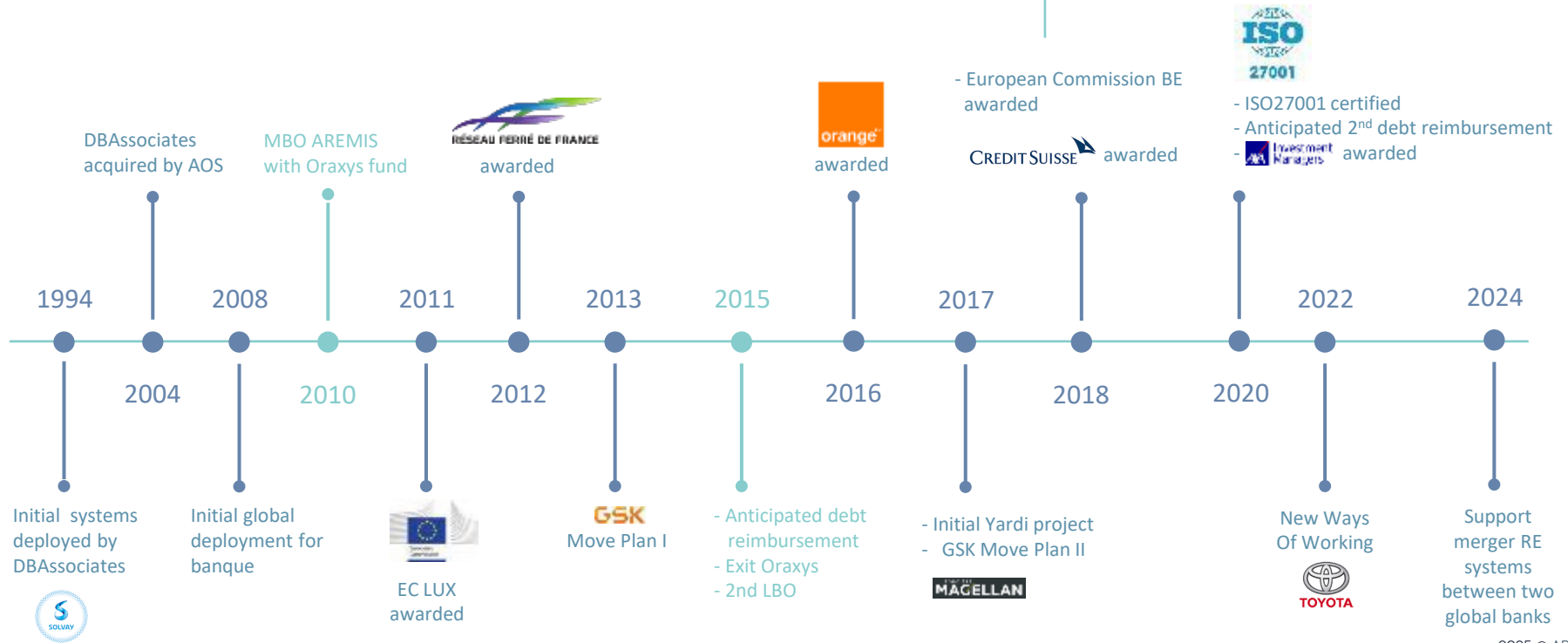
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32 years in one slide

Our story





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Régine Bruyère

Head of Sales BE/LU

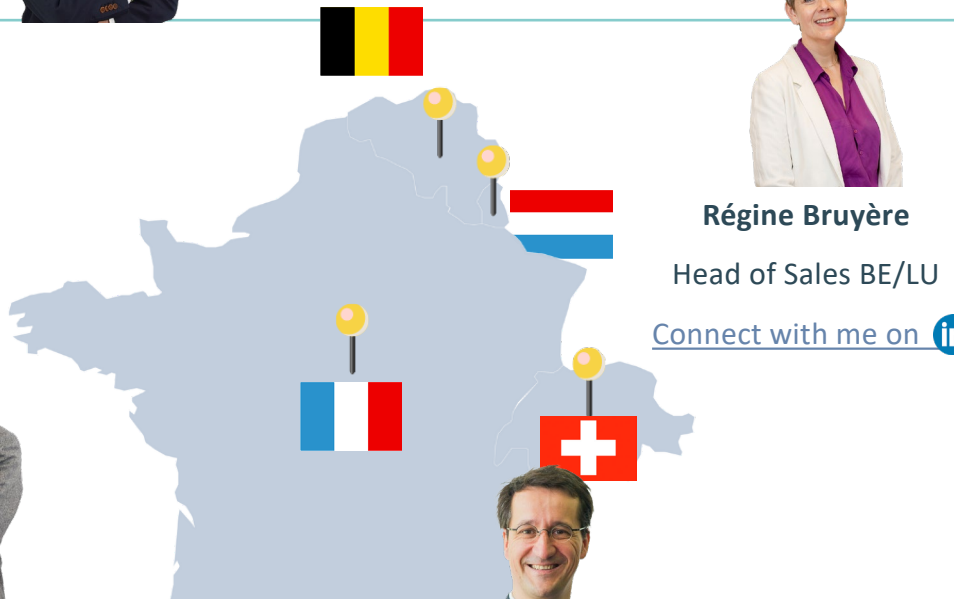
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contact point

www.aremis.com/contact





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THANKS

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This report has been prepared based on the results of a survey conducted among AREMIS' network of industry leaders who generously shared their experiences with regards to hybrid working. We believe it reflects some of the opinions present in the market at the current time and do not assert that it represents all opinions. If the report's conclusions resonate within your own organisation, we encourage you to work with us to assess your specific situation.

This report is a collaboration between our Workplace, Consulting, Insight and Marketing teams, based on the valuable input of the participating clients.