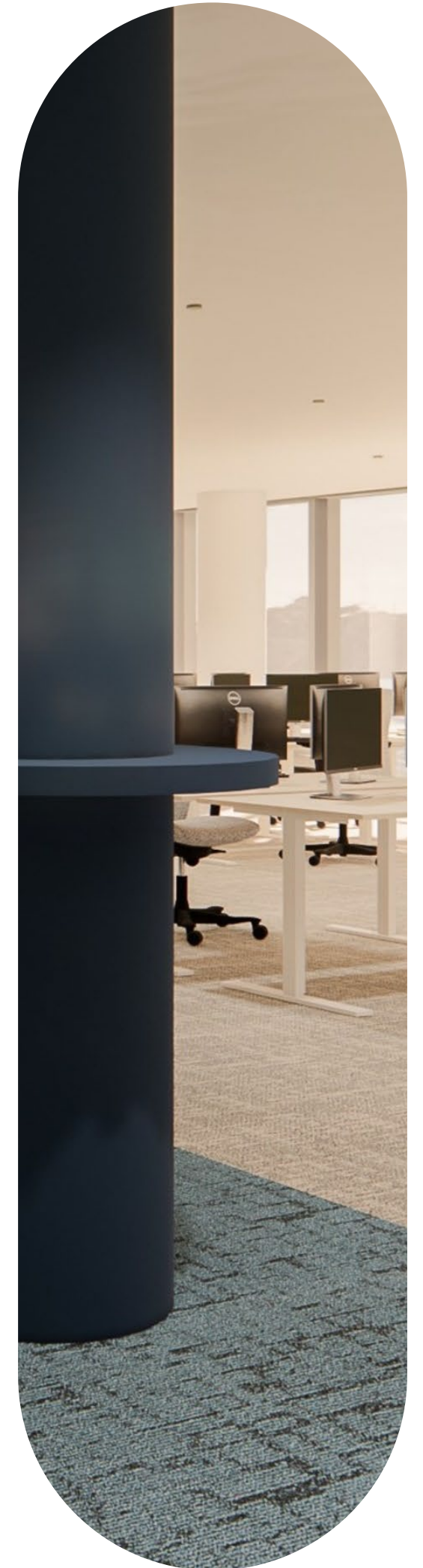# Rethinking Hybrid Work
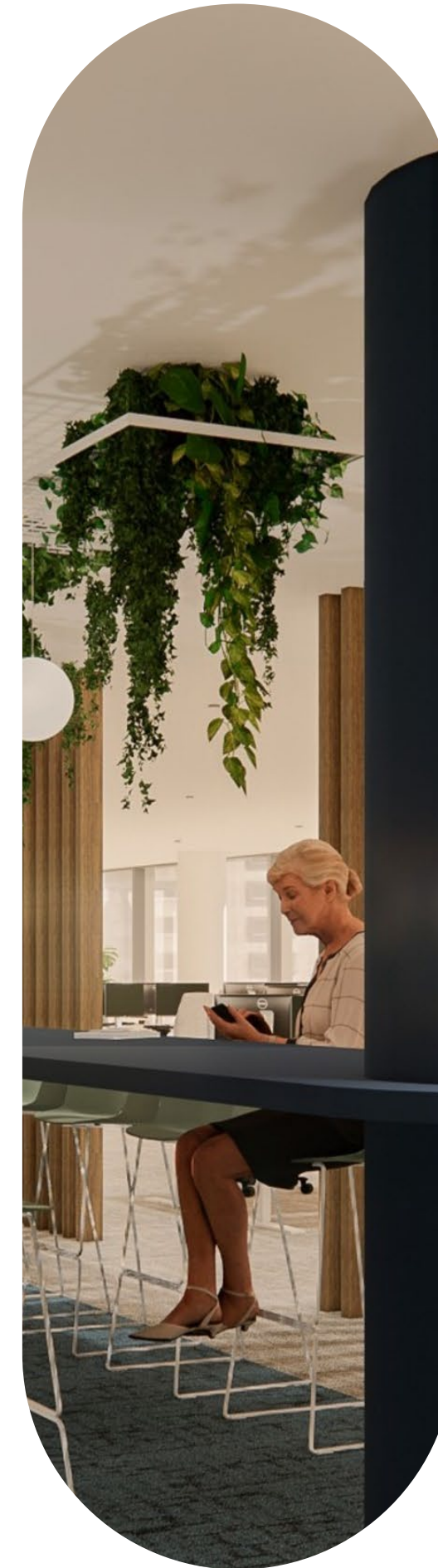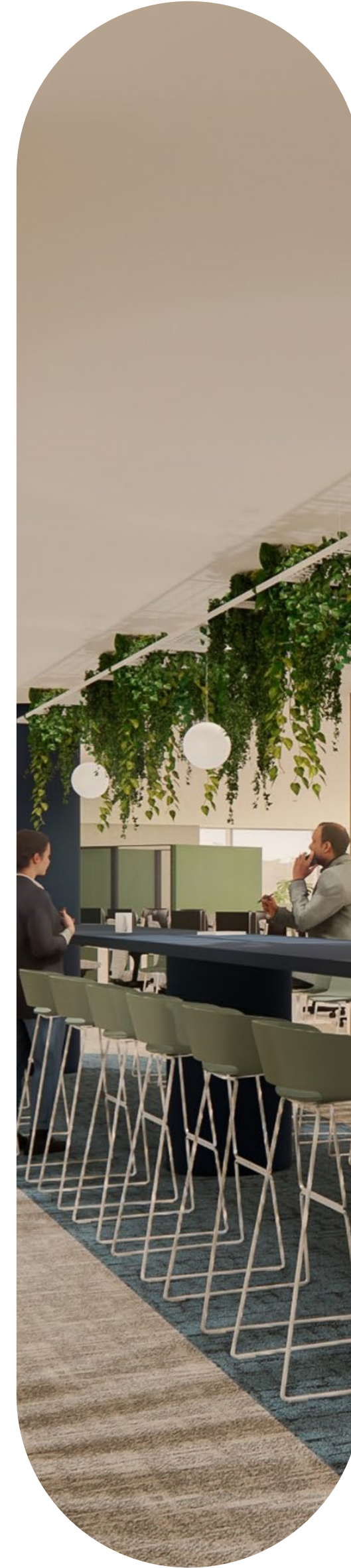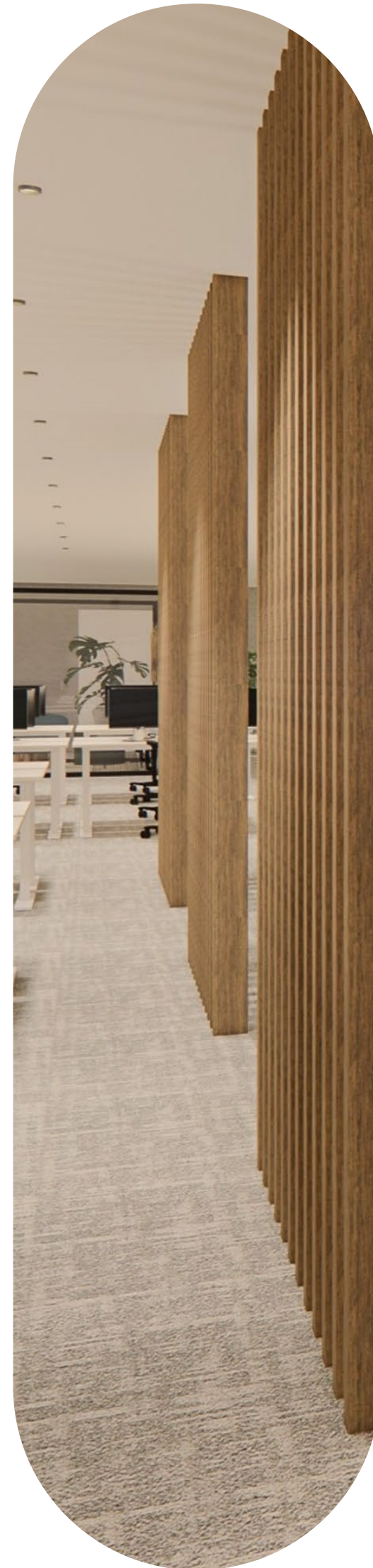
2024 Report

AREMIS
WORKPLACE ENABLERS

Overview

2024 Hybrid Survey Report

Comfort Flexibility
Working from anywhere
Hybrid spaces Rules Communication
Tools need Desk sharing
Trust Context
Company vision

This report has been prepared based on the results of a survey conducted among AREMIS' network of industry leaders who kindly 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 in order 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.

The ~~Future~~ Present Is Hybrid

Beyond return-to-office initiatives, many companies are still struggling to define **a balanced hybrid working approach** that lets their employees and the company benefit fully from the office while maintaining the advantages of working from home or elsewhere.

During the autumn of 2023, we asked **our network of clients and experts** how they're dealing with this challenge.

This report brings together our findings from that survey.

Data Matter, Right?

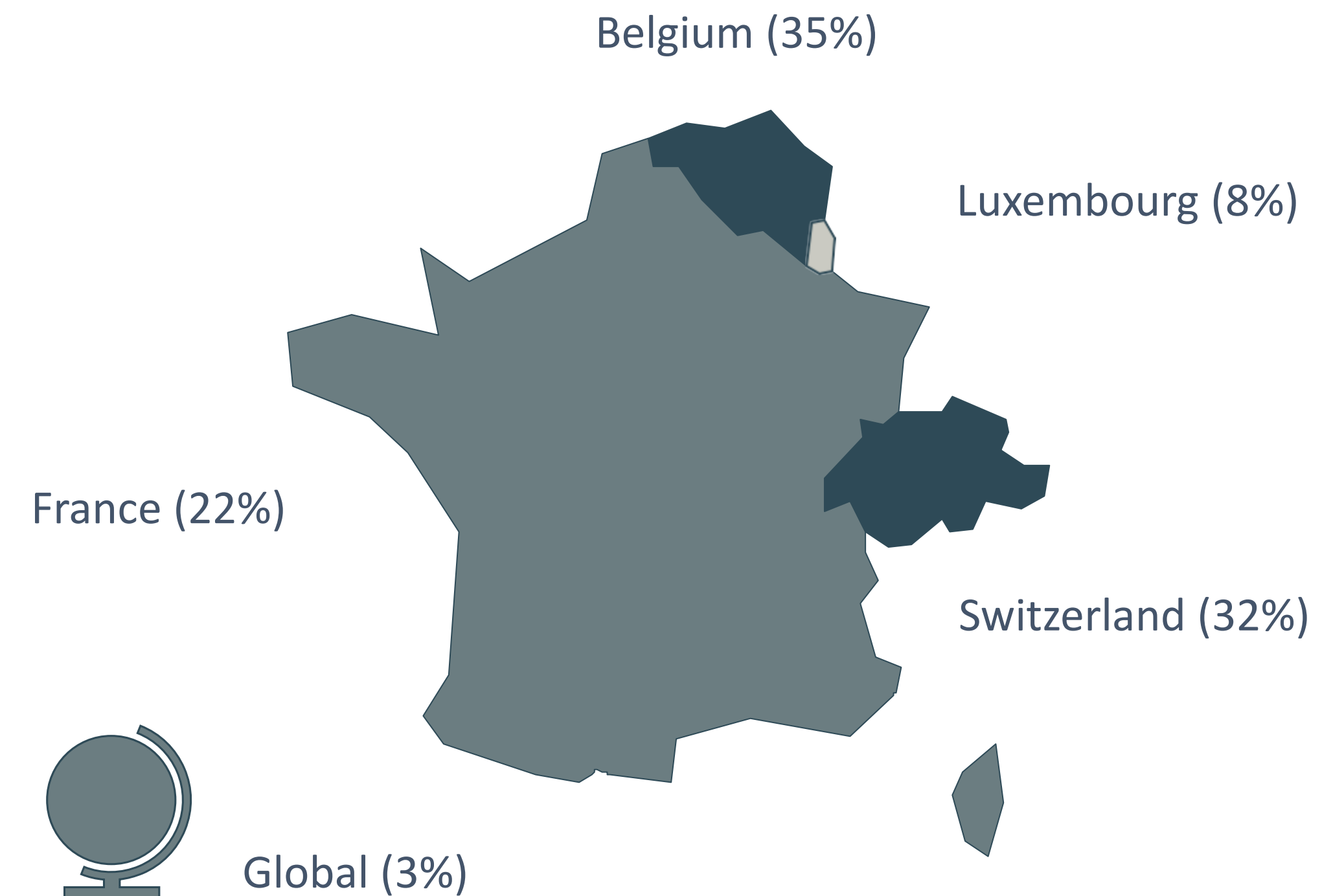Meet The Team Behind This Study

Context

01

Audience

2024 Hybrid Survey

This survey was completed by **65 companies** across **4 countries** representing 500 K+ office occupants.

The objective was to explore the different ways companies are managing hybrid working today.

Repartition of respondents per country

Belgium (35%)

Luxembourg (8%)

France (22%)

Switzerland (32%)

Global (3%)

Repartition per sector

Technology, media & telecom	13%
Supranational	6%
Real estate & construction	8%
National public sector	19%
Life Sciences	3%
Law	3%
Industrial	14%
Fast Moving Consumer Goods	5%
Business Services	19%
Banking & Insurance	10%
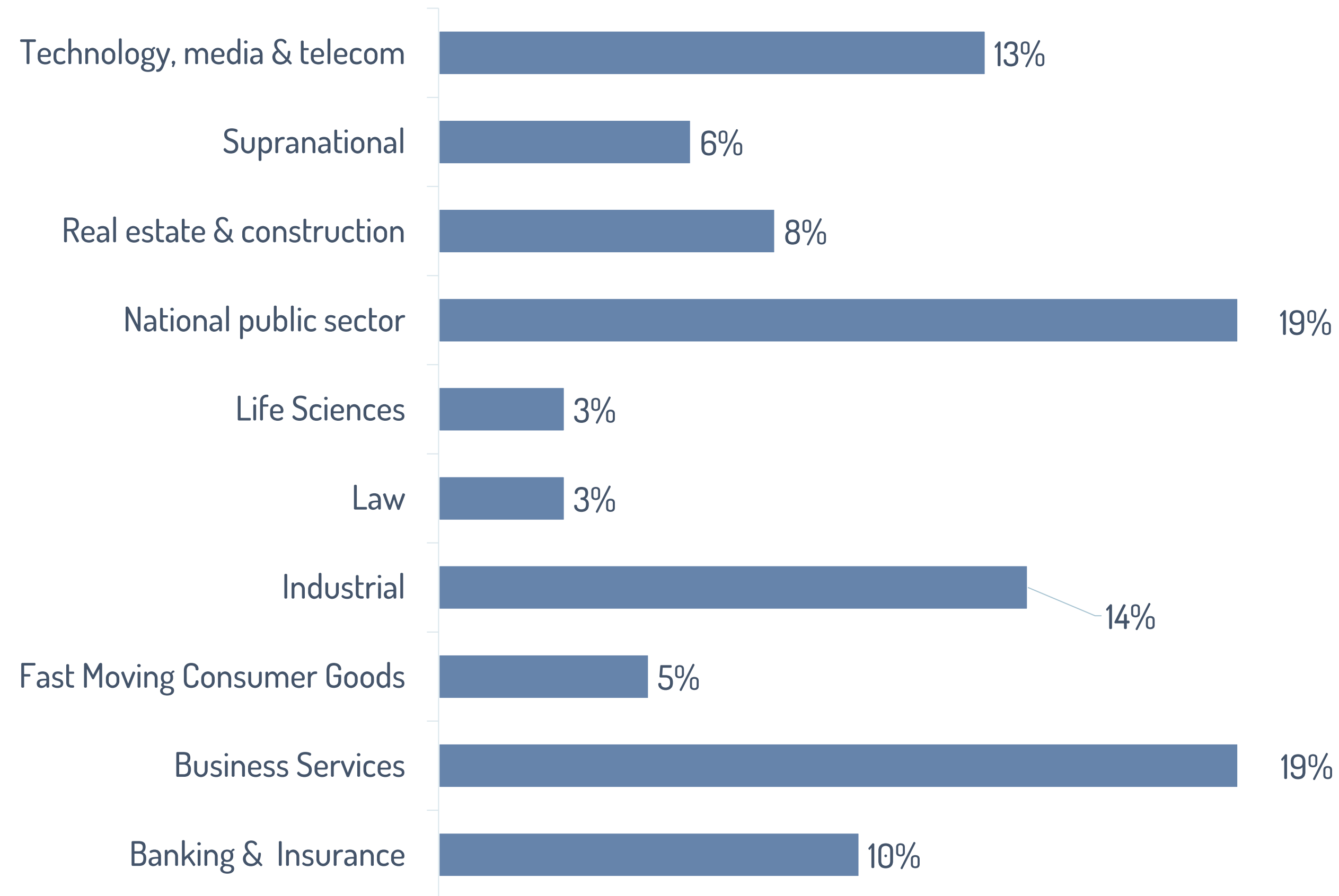
Repartition of company size

[< 250 p.]	[250 – 500 p.]	[500 – 1 000 p.]	[1 000 – 2 000 p.]	[2 000 – 5 000 p.]	[5 000 – 10 000 p.]	[> 10 000 p.]
14%	10%	13%	11%	27%	19%	6%
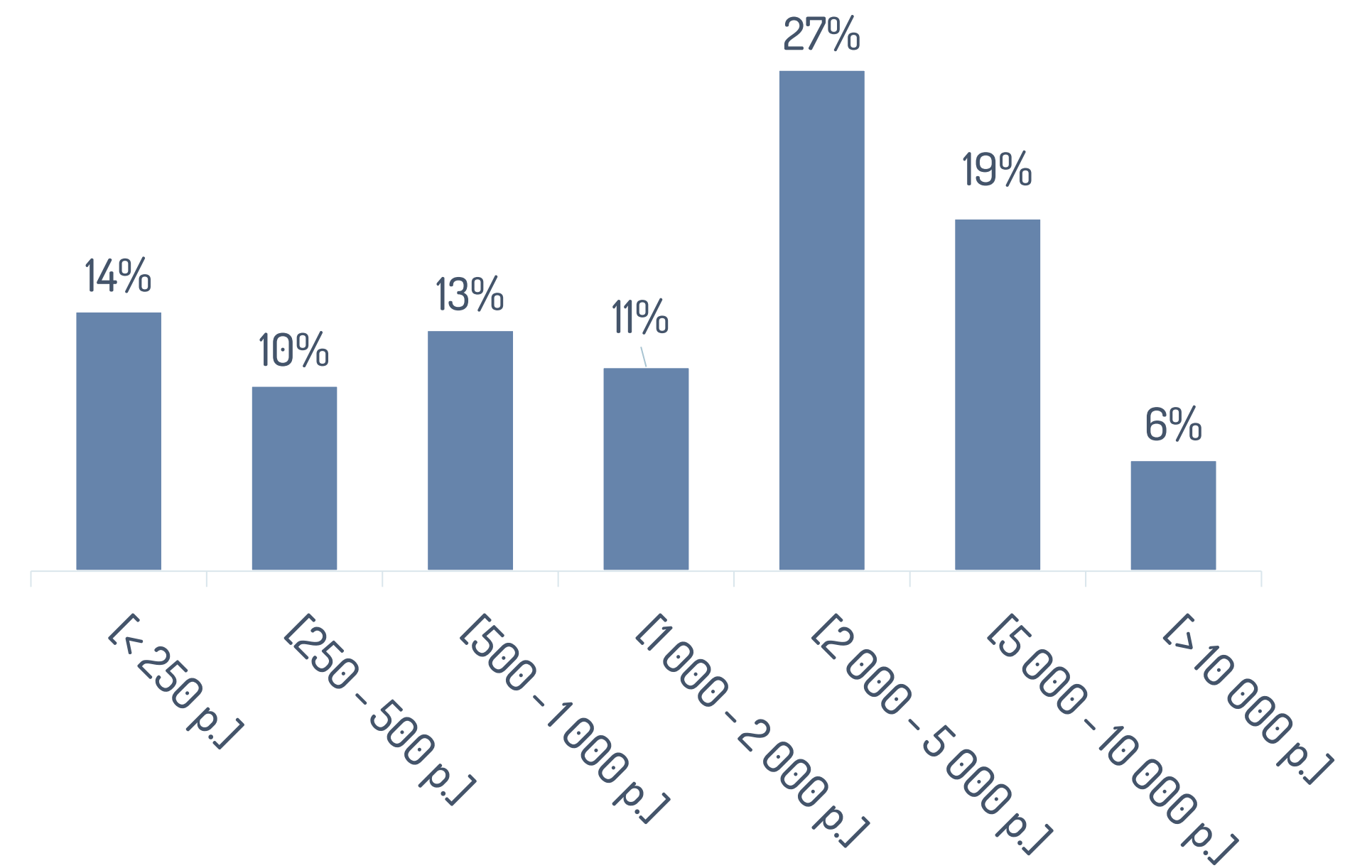
Key Findings

02

Top 3 Findings

You Should Keep In Mind

01

Formal Policy Versus Flexible Agreements

Give your employees the right balance of structure and freedom

02

Build Upon Digital Solutions And Data

Use objective data, not gut feelings, as the basis
for decision–making

03

Leverage Hybrid Work To Optimise Space

Smooth out occupancy in terms of space and time
with a balanced approach to hybrid working
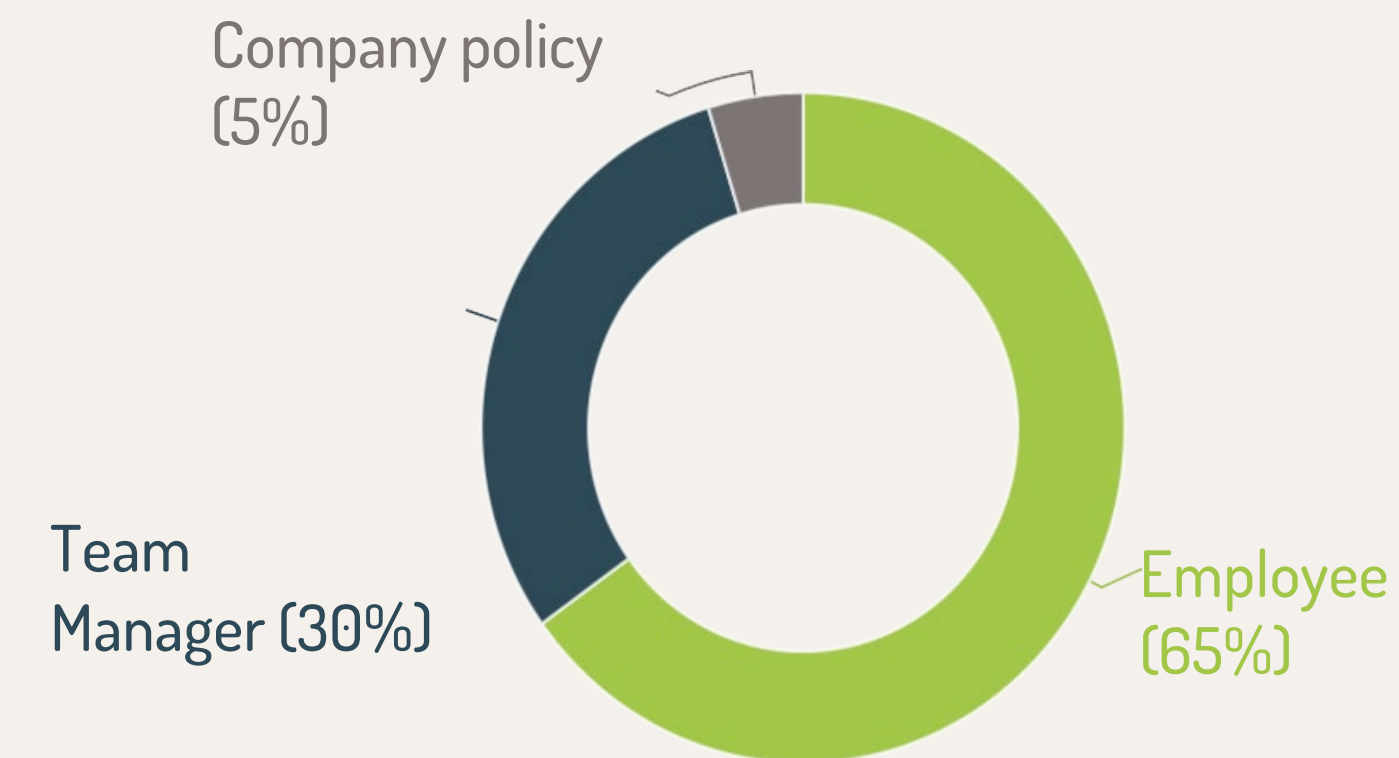
FORMAL POLICY VERSUS FLEXIBLE AGREEMENTS

Companies should aim for the **right balance** between setting up a hybrid work policy and allowing employees to organise their office days in a flexible way.

Our survey revealed that the choice of office days office is determined by **company policy** (5%) or **team managers** (30%), whereas in the remaining 65% of cases, **employees** decide themselves in coordination with their peers.
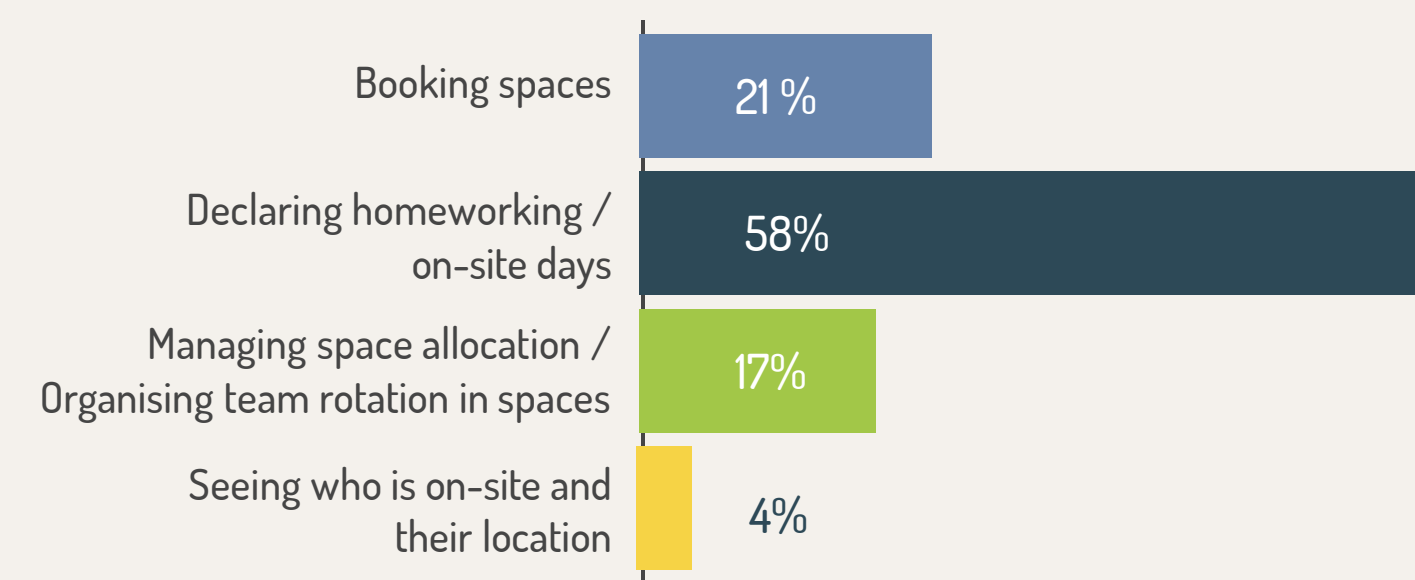
In 21% of cases, companies let employees **book space** in advance, but most companies agree that tools should focus on:

• declaring the intent to be in the office; and

• understanding the interaction with other teams.

Choice of days in the office

Company policy (5%)

Team Manager (30%)

Employee (65%)

What processes are supported by tools or platforms ?

Booking spaces	21 %
Declaring homeworking / on-site days	58%
Managing space allocation / Organising team rotation in spaces	17%
Seeing who is on-site and their location	4%

Structured Flexibility

How To Proceed

Offering flexibility does not mean leaving employees without rules or without tools.

The **rules** and **tools** that are put in place should remain **adaptive** and allow different team organisations to be accommodated.

To stay on top of the situation, there needs to be a minimum of **monitoring** to assess what happens in reality.

BUILD UPON DIGITAL SOLUTIONS AND DATA

Many decisions are still taken based on gut feelings and assumptions, whereas **objective data and digital platforms** should be the basis for decision-making.

Only half of the companies surveyed measure site attendance in general, and the **space utilisation** of their floors or more specific spaces like meeting rooms in particular. Companies doing so are under more pressure for **space availability** and clearly want to optimise this.
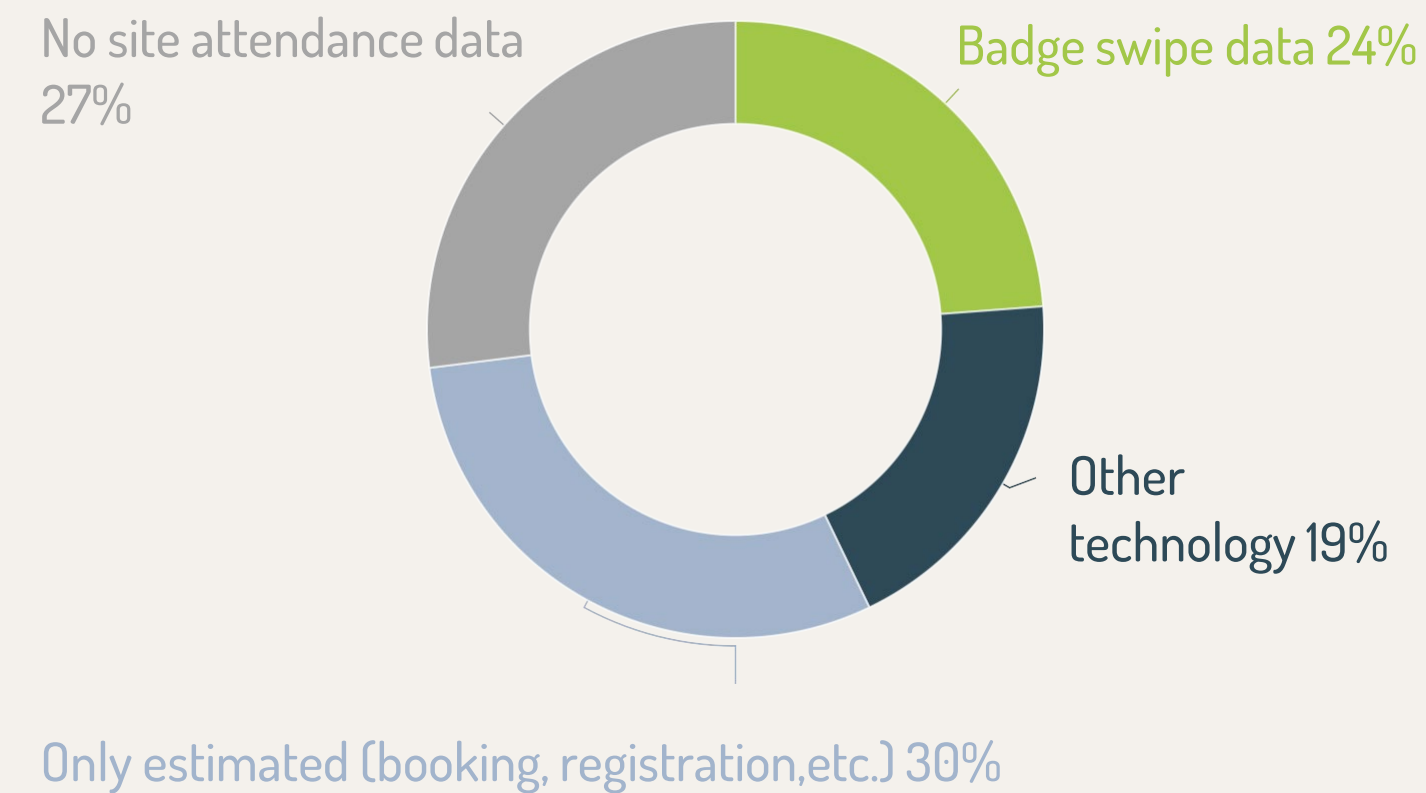
There is also growing use of actionable data and targeted digital tools to provide **structured support** around employee experience.

40% of companies use a tool to manage and plan hybrid working

Yes (40%)	No (60%)

Measuring site attendance

No site attendance data 27%

Badge swipe data 24%

Other technology 19%

Only estimated (booking, registration, etc.) 30%

Digital & Data

How To Proceed

Although gut feelings still guide many decisions, there is a clear tendency to **support hybrid working** with targeted solutions and clear data.

Collecting more data makes it easier to understand the current situation and **forecast future needs**. This is the case not only for quantitative aspects like office attendance and office planning, but also for qualitative aspects like evaluating employees' overall office experience.
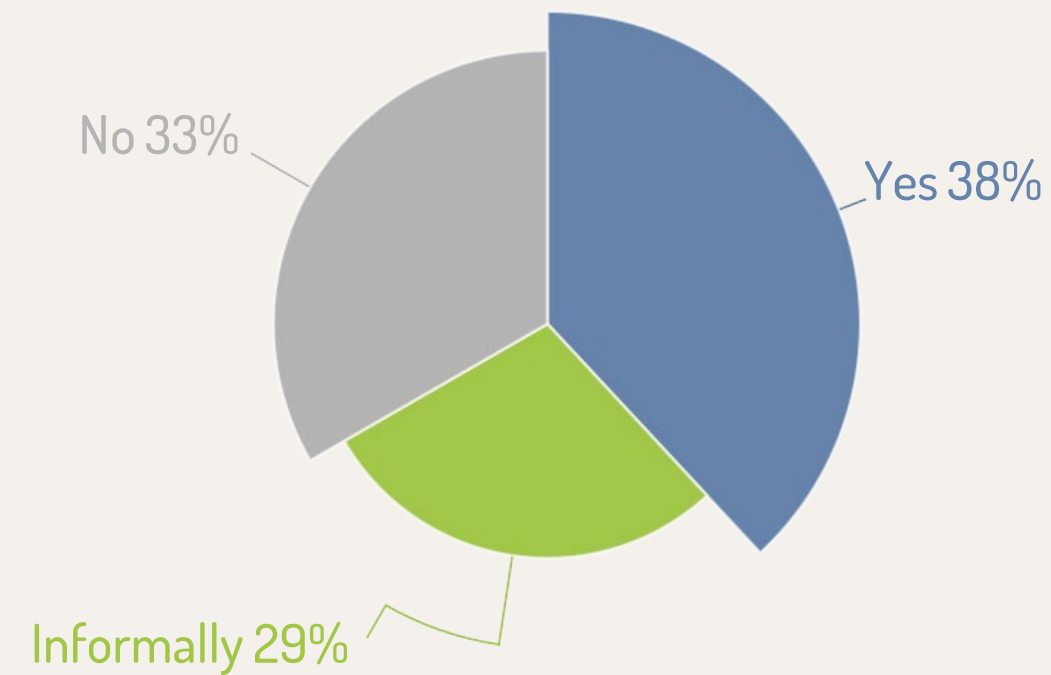
LEVERAGE HYBRID WORK TO OPTIMIZE SPACE

A better understanding of hybrid working practices within companies allows for **considerable space optimisation**, not only in terms of zoning but also in terms of portfolio reduction.
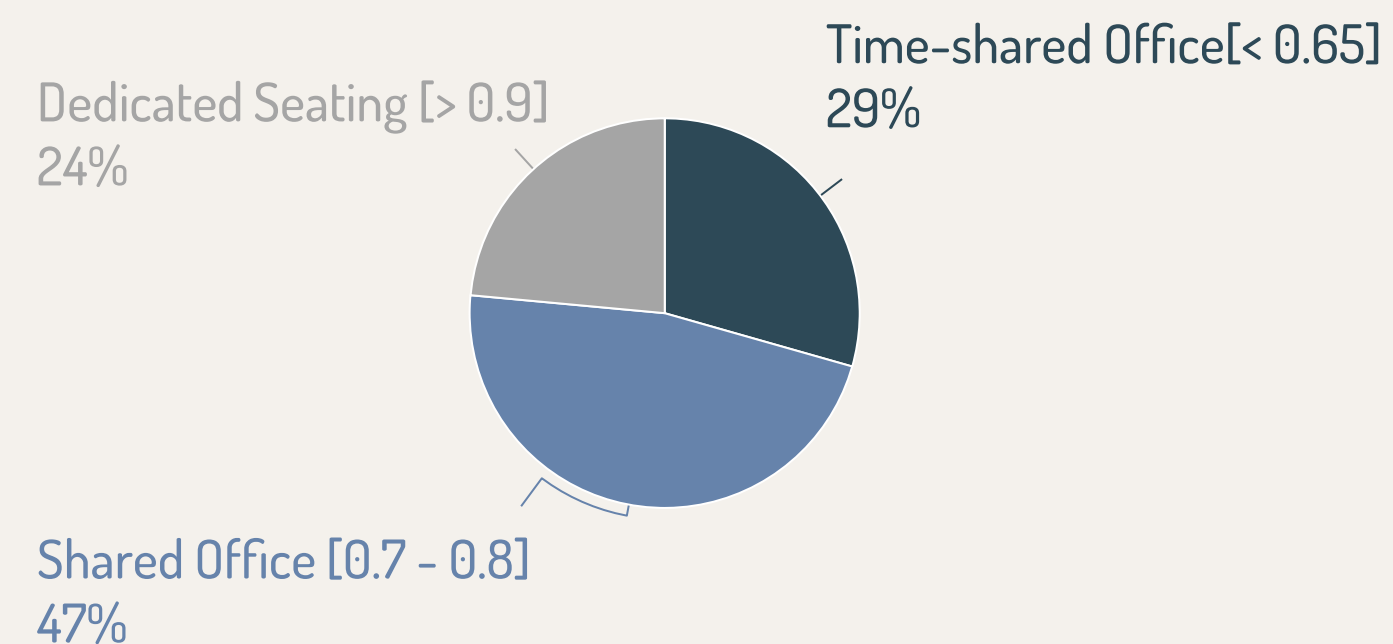
Space allocation tools can make it possible to have have a **rotational occupancy**, where teams occupy certain zones on different days of the week according their needs.

More than 29% of the companies surveyed coordinate with their teams to establish agreed day-of-week patterns, allowing some to achieve desk sharing ratios of **less than 0.5 desks per employee.**

Do you coordinate with your teams on when to use the office ?

No 33%

Yes 38%

Informally 29%

20 % of companies want to increase their sharing ratio

Dedicated Seating [> 0.9]
24%

Time-shared Office[< 0.65]
29%

Shared Office [0.7 – 0.8]
47%

Optimise Space

How To Proceed

Implementing a balanced approach to hybrid working can help companies **smooth out occupancy across teams** and across time.

This can reduce the number of desks needed for individual occupancy and provide more room for **collaborative spaces** and informal areas.

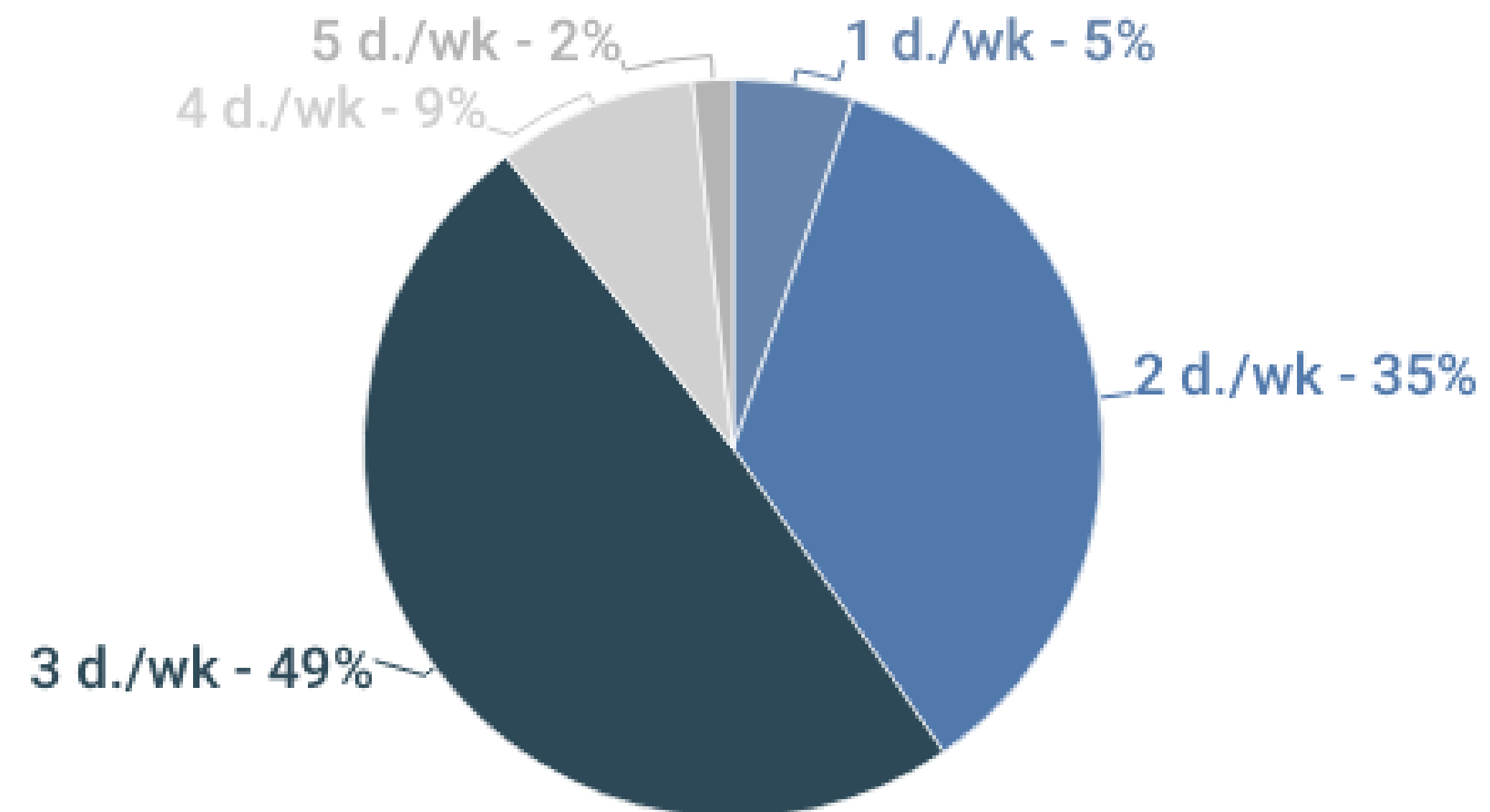In the end, it can also lead to a reduction in the overall real-estate **portfolio footprint**.

Details

03

Hybrid Rules

Number Of Mandatory Days On Site

5 d./wk - 2%

4 d./wk - 9%

1 d./wk - 5%
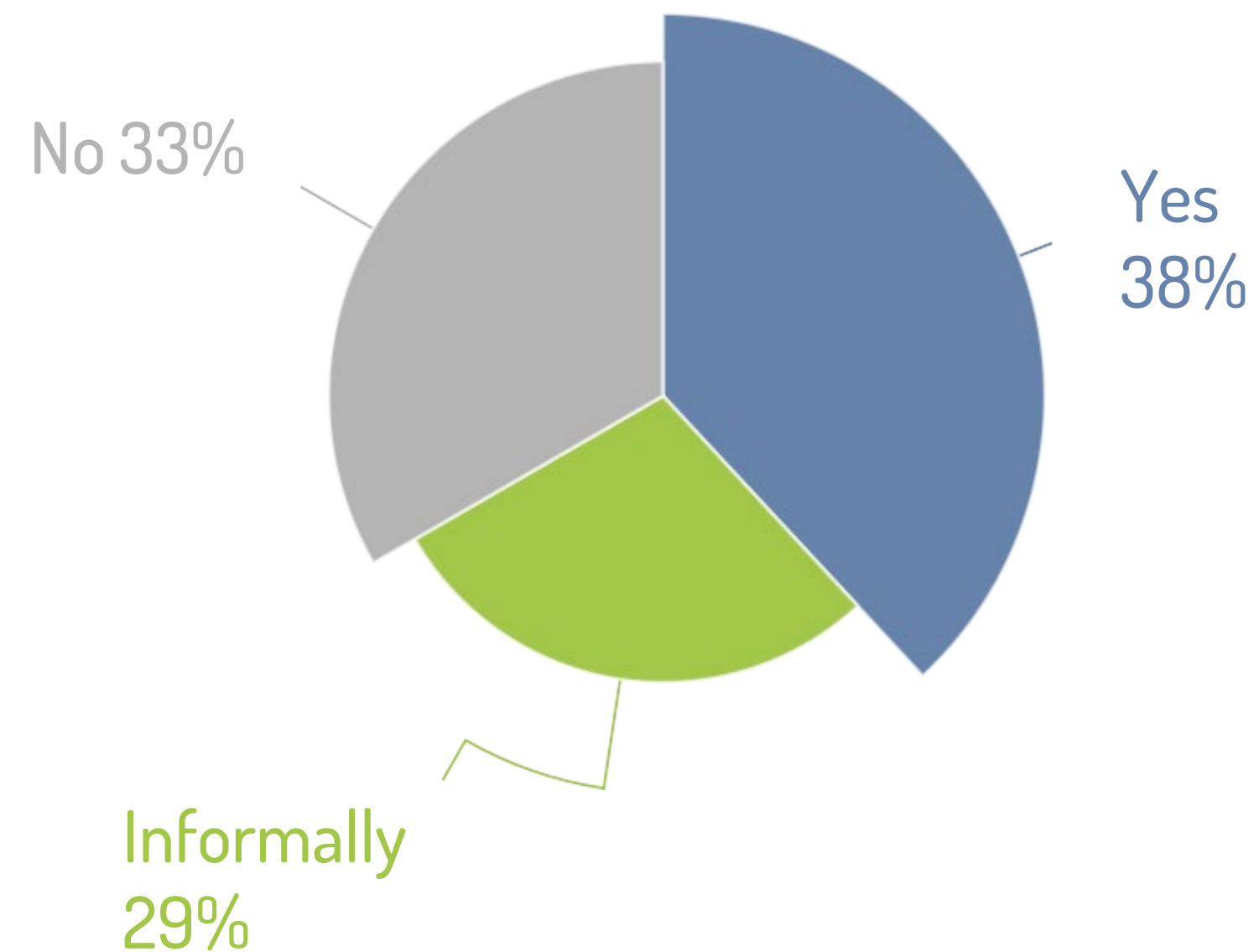
2 d./wk - 35%

3 d./wk - 49%

Almost 85 % of the companies surveyed ask for a return on site of 2 or 3 days/week.

30 % of companies allow their employees to work also from abroad.

Space Usage

Are Floor Agreements In Place?

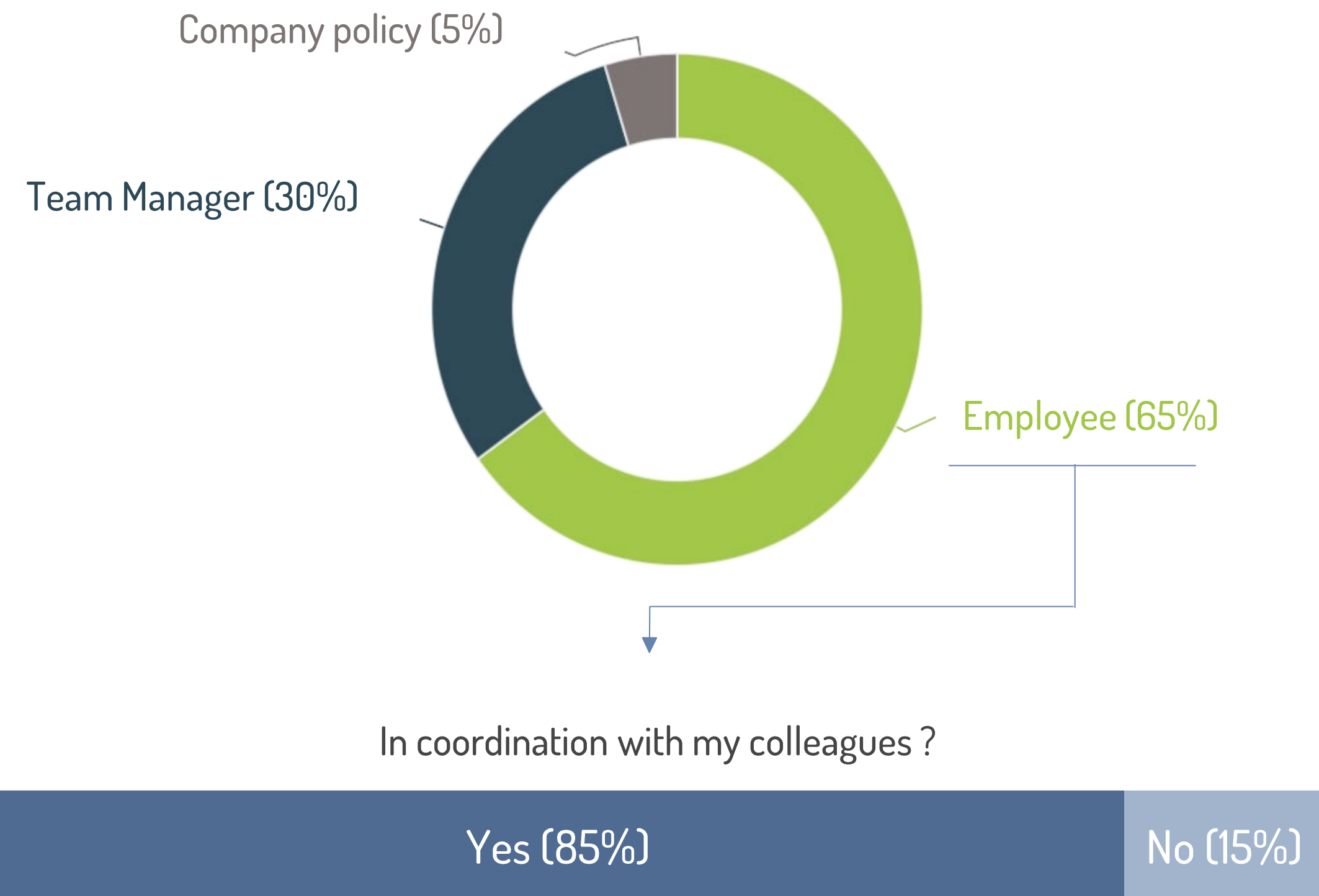No 33%

Yes
38%

Informally
29%

More than 65 % of companies coordinate with their teams to use space with **agreed week patterns**, formally or informally.

Only 11 % of companies close occasionally (during holidays, low attendance weeks/days , shutdowns, etc.), so low office occupancy and the **cost of energy** do not seem to give strong enough incentives to impose a weekday of closure.

➡ 40 % of companies take advantage of a tool to manage and plan hybrid working.

Hybrid Rules

Who Determines When To Come To The Office?

Company policy (5%)

Team Manager (30%)

Employee (65%)

In coordination with my colleagues ?
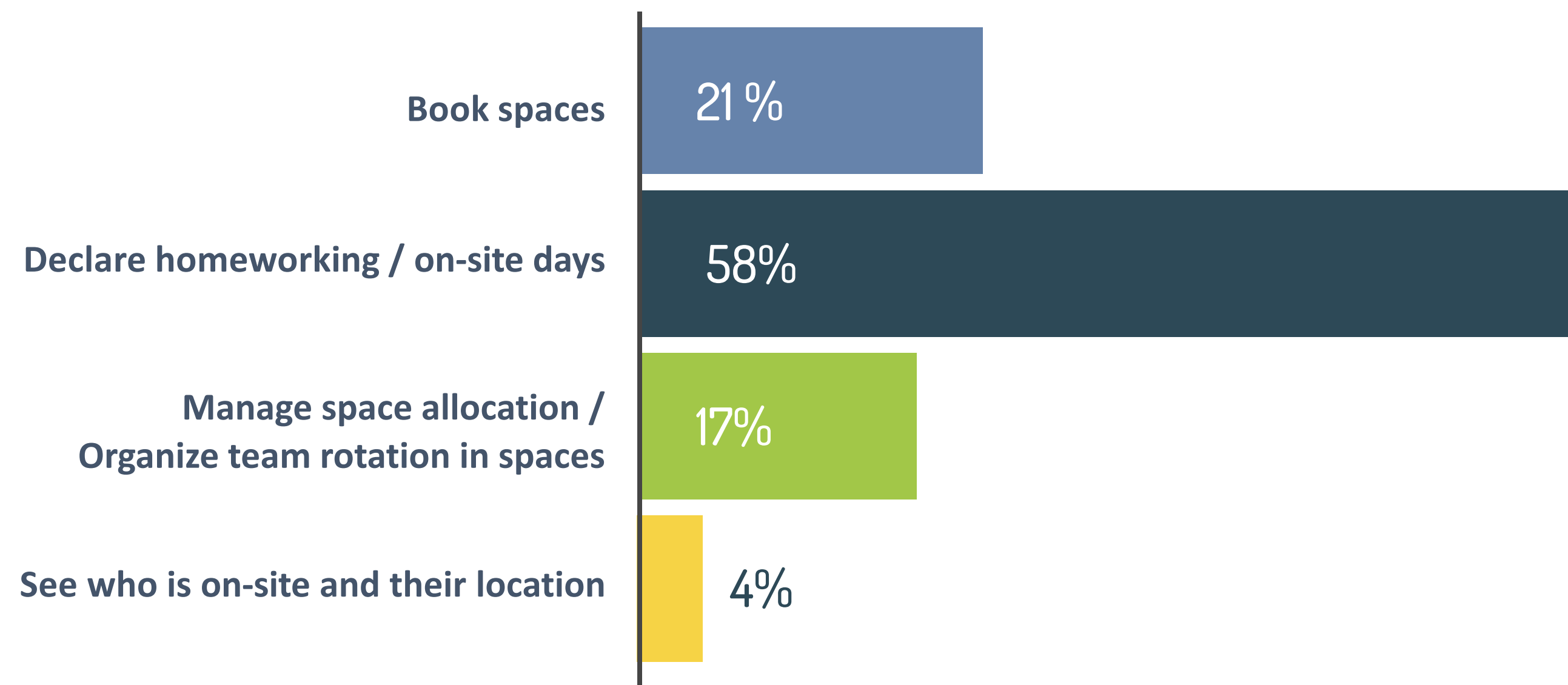
Yes (85%)   No (15%)

The choice of days on which we need to be in the office is made for **35% of the cases by the company** (policy or team managers)

But in 2/3 of the cases the employees decide for themselves, most often in **close coordination** with the direct colleagues.

Space Usage

Plan For Hybrid Working Agreements

What processes are supported by tools/platforms ?

| Process	Percentage
Book spaces	21 %
Declare homeworking / on-site days	58%
Manage space allocation / Organize team rotation in spaces	17%
See who is on-site and their location	4%

Only in 21% of the cases , companies allow to **Book Space** through a reservation process, be it an individual desk or a place in a larger zone.

But most companies agree that tools should focus on **declaring intents** to be in the office and **understanding the interactions** with other teams, so that occupation can be planned at team level and does not impose individual reservations.

Site Attendance

How Many People Do Return?

45% of companies measure site attendance using badge swipe data or other technologies (e.g. sensors, counters, etc.).

No site attendance data 27%

Badge swipe data 24%

Other technology 19%

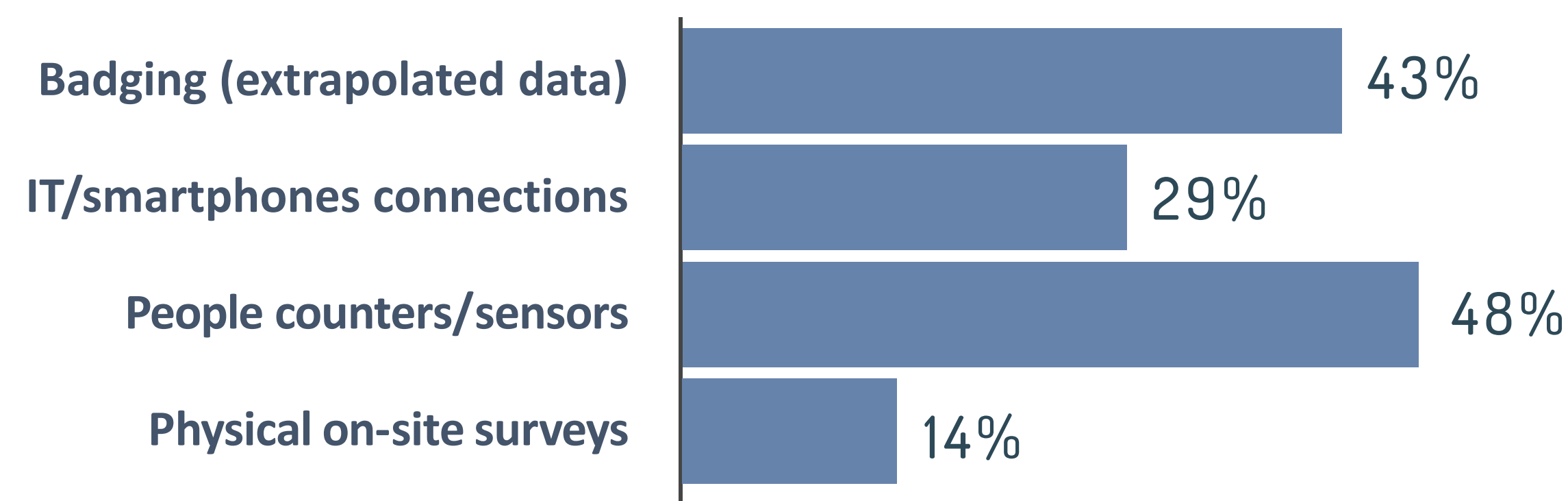Only estimated (booking, registration,etc.) 30%
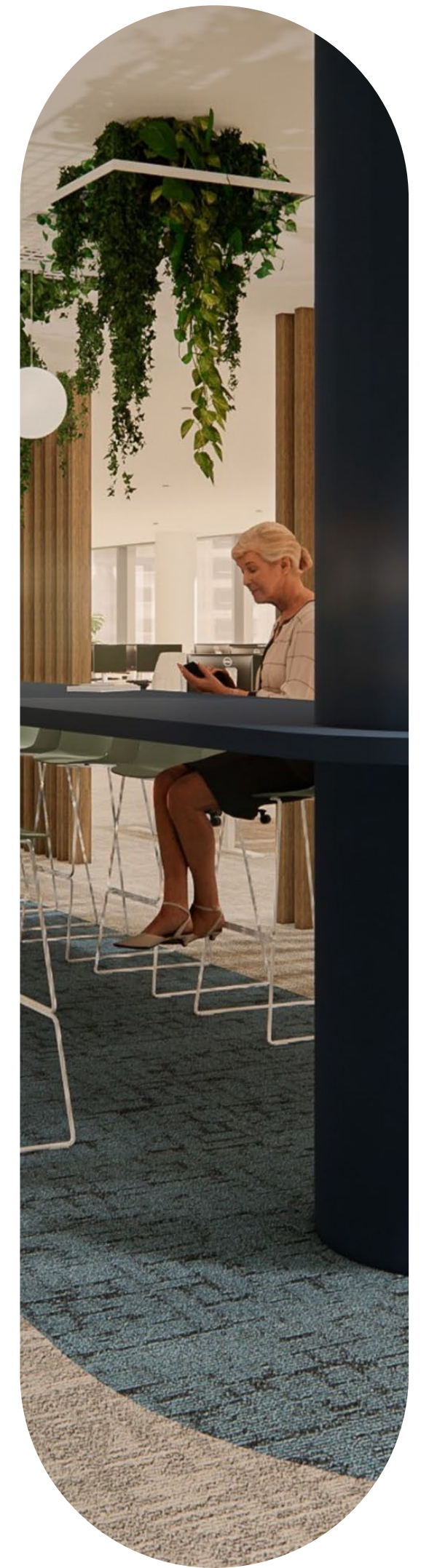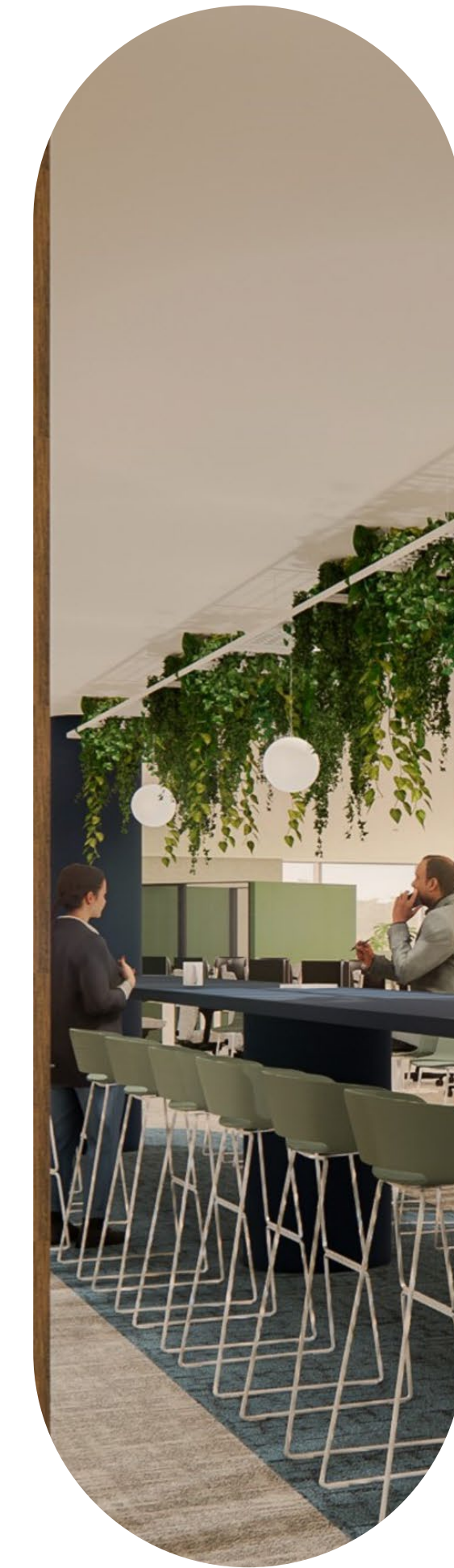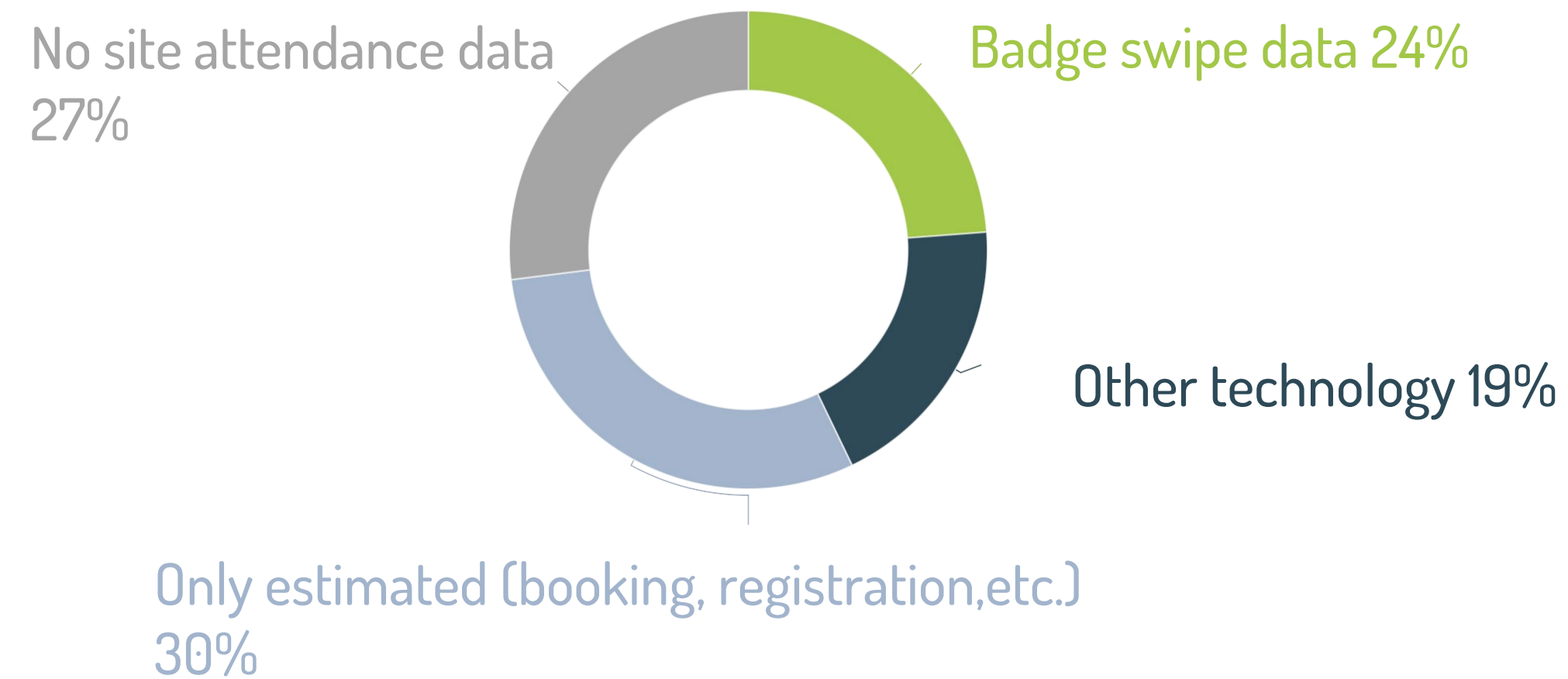
Workplace Utilization

What Spaces Do We Use ?

Among the companies measuring site attendance, some also collect detailed workplace utilisation data.

Data is acquired through:

Badging (extrapolated data)	43%
IT/smartphones connections	29%
People counters/sensors	48%
Physical on-site surveys	14%

> Only **20 %** of companies want to increase their sharing ratio.

Measuring workplace utilisation is a key foundation for exploring other levels of space sharing.

While the dedicated seating model is still used in special circumstances (e.g. more regulated and compliance-driven working environments), we see an evolution towards both space and/or time-shared offices.

Dedicated Seating [> 0.9] 24%

Time-shared Office [< 0.65] 29%

Shared Office [0.7 – 0.8] 47%
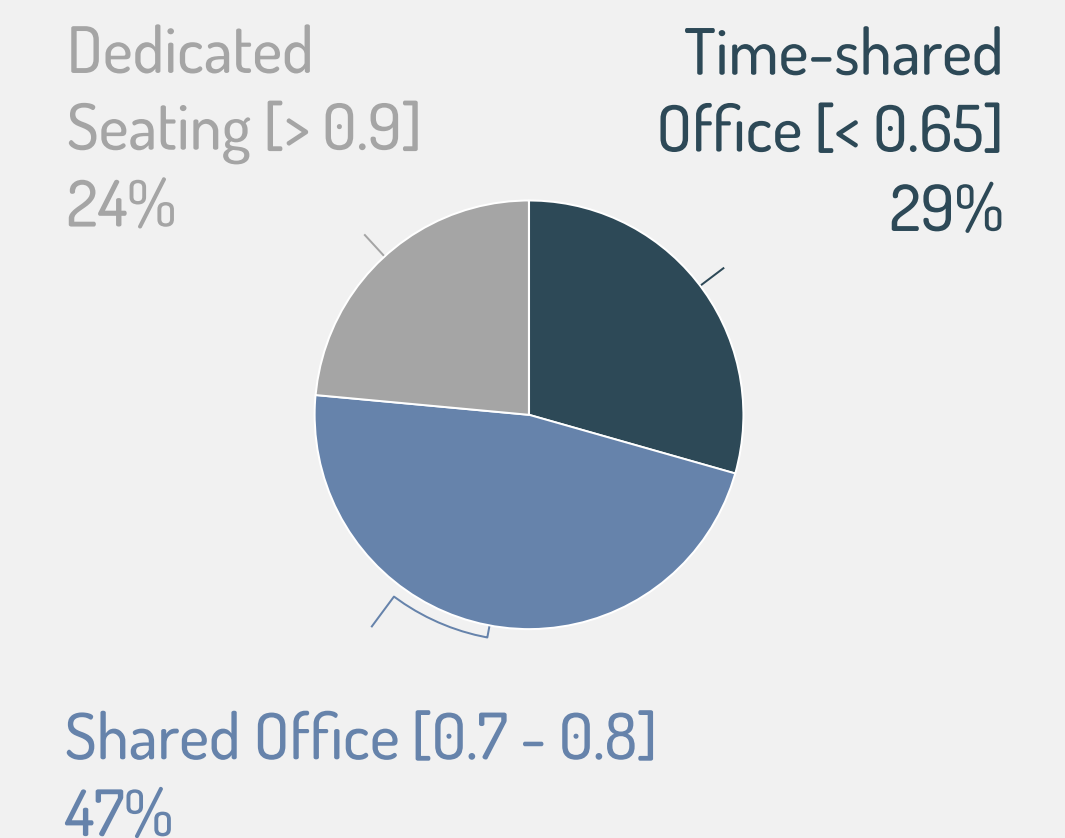
User Experience

How Important Is It?

32 % of companies measure user experience.
75 % of those companies do so internally.

External Ad-hoc Survey 15%

External Benchmark (Leesman, …) 10%

Internal Feedback Process 75%
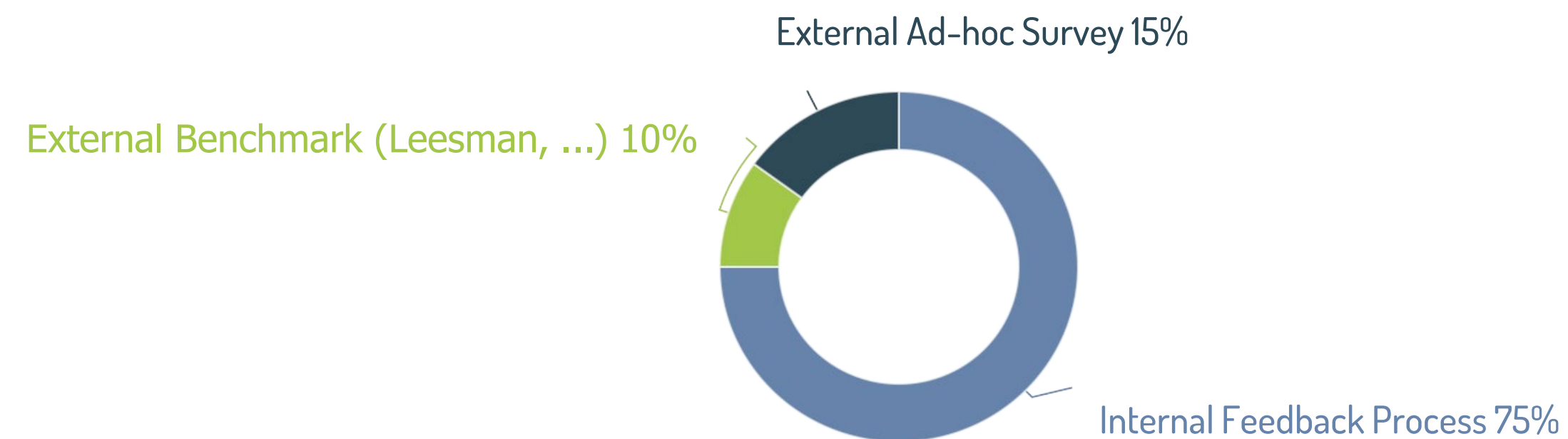
User Experience

How Important Is It?

70% of companies measure the effectiveness of the workplace user experience at least annually.

Other 15%

Quarterly 20%

Not regularly 15%
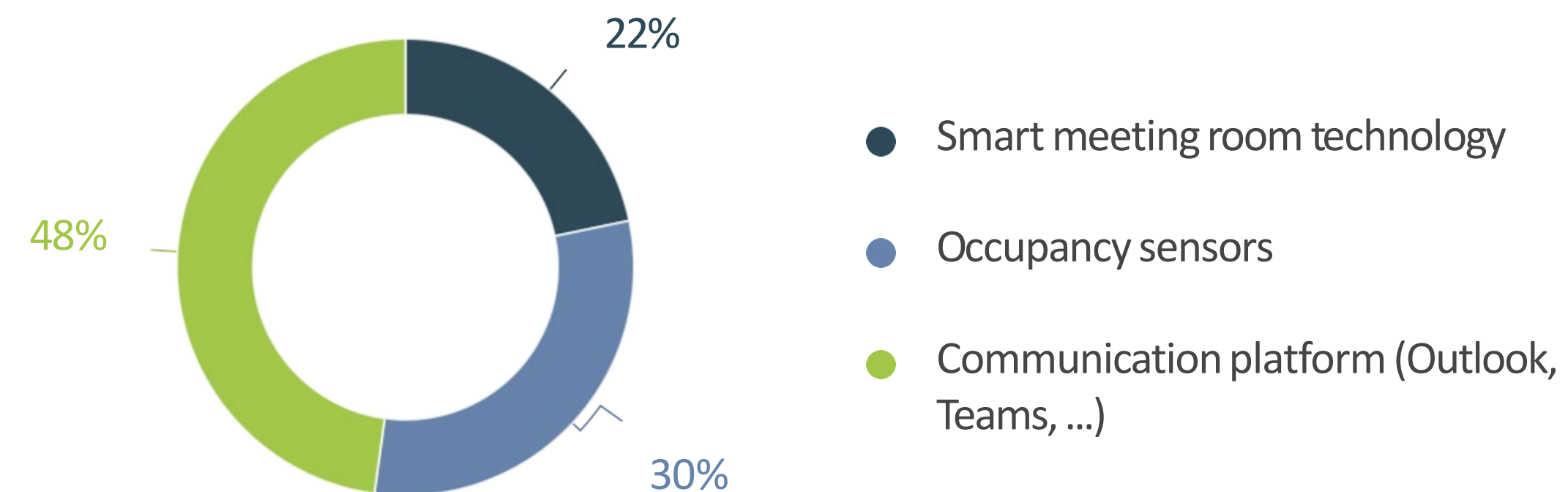
Bi-annually 15%

Annually 35%
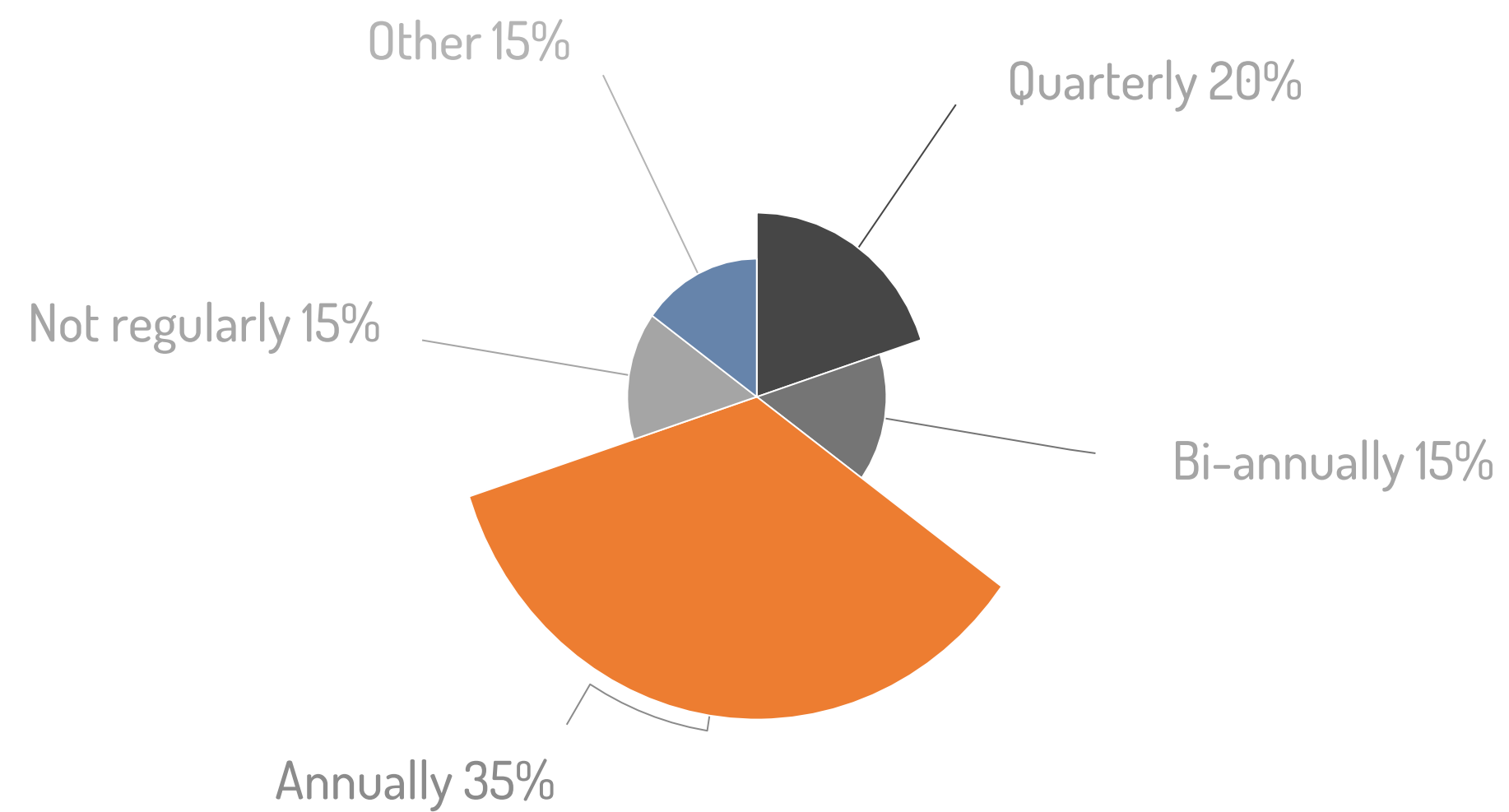
Meeting Rooms

How Many Do We Need?

Only 35% of companies measure or estimate meeting room occupancy.

Yes 35%

No 65%
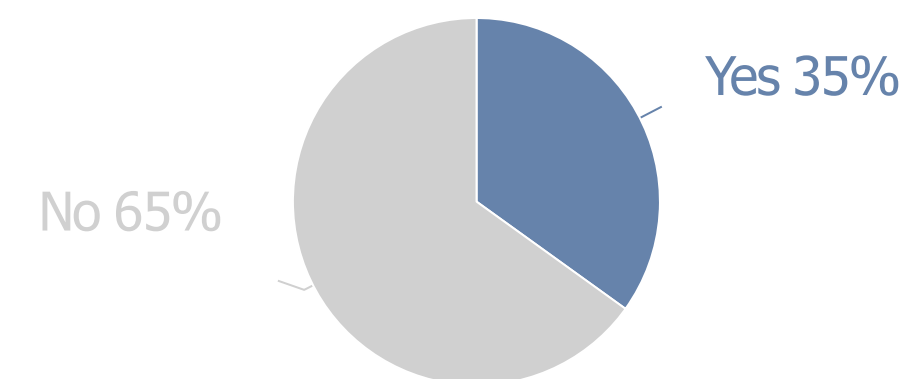
This is done through various technology and input sources:

22%

48%

30%

● Smart meeting room technology

● Occupancy sensors

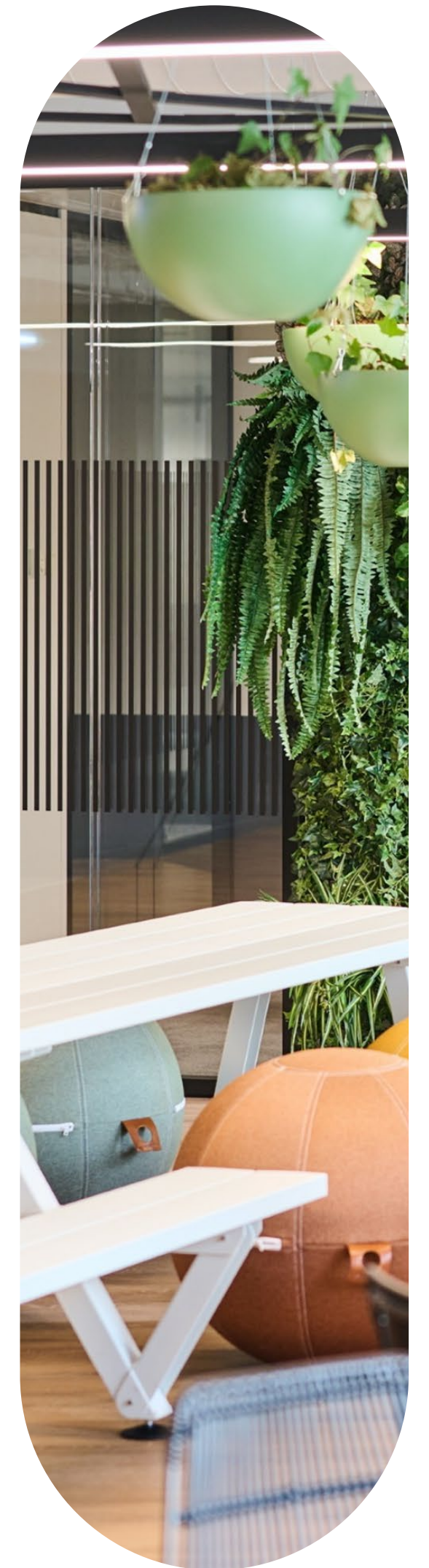● Communication platform (Outlook, Teams, ...)

Change

60%

of companies have already invested in, or are considering engaging in, a change management programme to support the transition to hybrid working.

Key topics addressed in change management programmes include:

- Employee involvement in the transition
- Focus on results rather than presence
- Need for support and data
- Change as part of a major workplace project
- HR as a change driver
- Need for management commitment
- Need for rules
- Importance of communication
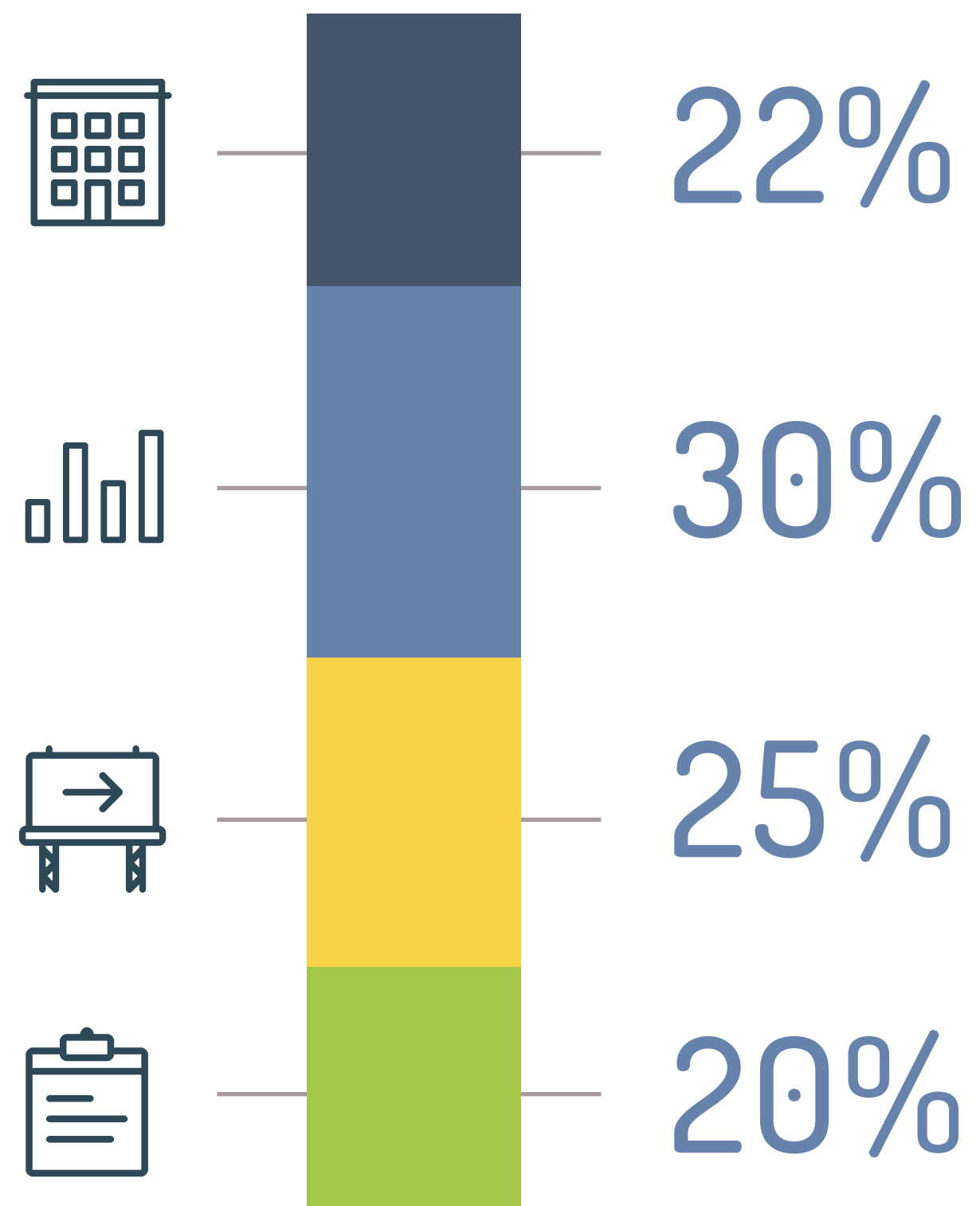- Continuous improvement and reflection

Next Steps

Next Challenges

Small And Medium Companies

30% Organization & Change

Develop your hybrid and homeworking strategy and policies with a clear understanding of the impact on your organisation, budget, etc.

25% Attracting People To The Office

Provide a great office experience to attract people to the office, so your return-to-office plan is respected, and team presence is smoothly distributed.

25% Space Reorganization

Increase the overall sharing ratios of existing spaces and make better use of them. Introduce the flexible use of fewer desks and make more room for collaborative spaces.

20% Data & Tools

Collect and use more data to forecast office attendance and monitor the evolution as you implement other changes.

Next Challenges

Large Companies

Space Reorganization

22%

Downsize or sublet existing offices to reduce your real-estate footprint, allowing for better global portfolio planning. Introduce the flexible use of a reduced number of desks and make more room for collaborative spaces.

Data & Tools

30%

Collect more data to smooth out office occupancy and support forecasts of future occupancy. Implement effective tools for planning team collaboration and occupancy of activity-based zones.

Attracting People To The Office

25%

Provide an attractive office environment that encourages people to use the office. Run several pilots in parallel to test what setups provide the best fit for each team.

Organization & Change

20%

Establish balanced organisational policies around homeworking, with clear rules and commitments for all parties. Bring teams together according to their collaboration patterns.

How hybrid are YOU?

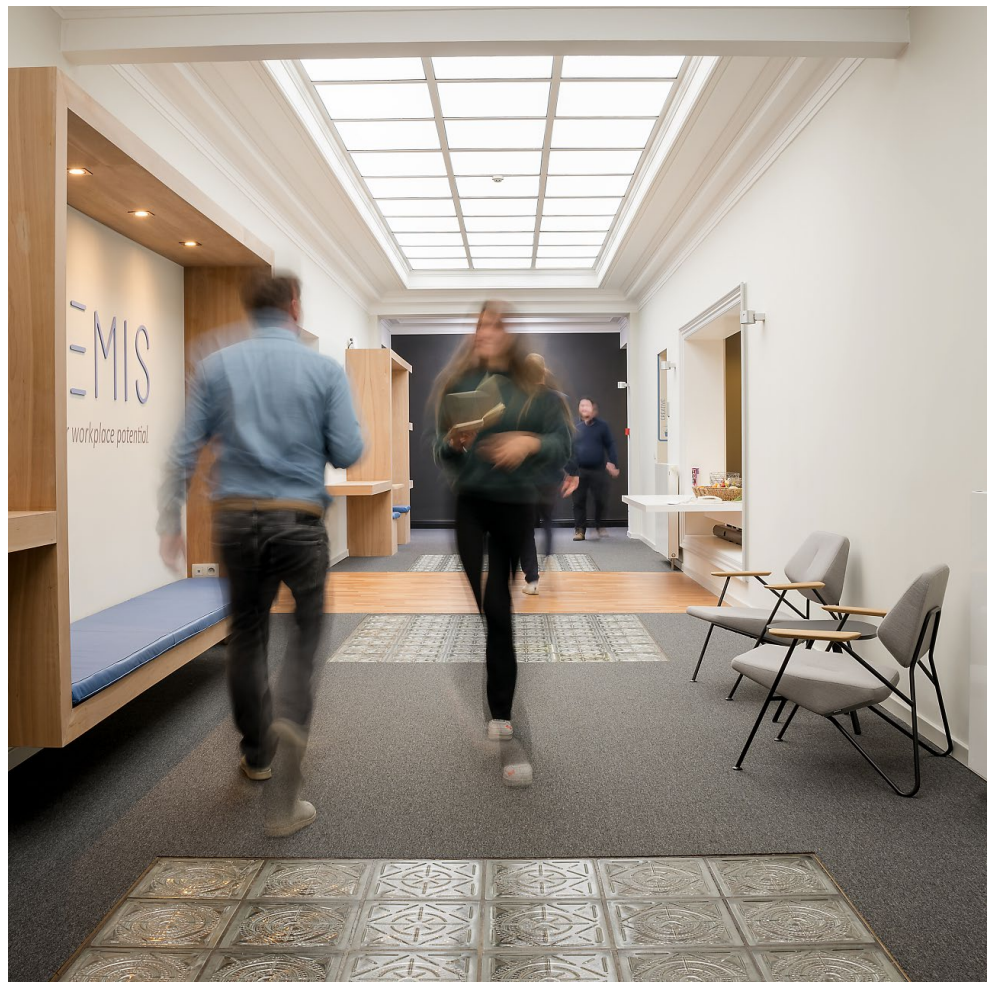Click Here To Take Our READINESS ASSESSMENT SURVEY

About
Aremis

Our Mission

At AREMIS, we deliver **real estate** and **workplace solutions** that help **investors, owners** and **occupiers** optimise **costs**, enhance **employee experience**, and improve **environmental performance**.

+65 millions of m²
of managed space

+320 clients
trust us

+30 Years
of experience

+160 Talents, consultants
and experts

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