

Beyond Mandates: The Future of Hybrid Work

JLL Workforce Preference Barometer 2025

Key Highlights

- **Employees have broadly accepted office attendance policies**, yet positive sentiment does not always translate into compliance. Employees expect employers to acknowledge their personal circumstances and to meet their high expectations for office environments.
- **The desire for work-life balance is stronger than ever**, outweighing salary. Flexibility needs are shifting towards management of time over place. While most employees recognize the benefits of being in the office, all aspire to have some autonomy over their hours and how they integrate work and life.
- **Wellbeing concerns, particularly burnout, pose a persistent threat to organizational outcomes** and employee retention, raising the need for employers to create more supportive work environments.

In many global organizations, hybrid working has become a permanent feature. Work-life balance expectations are evolving for both employees and their employers, continually shaping a new world of work. JLL's Workforce Preference Barometer 2025 surveyed 8,700 office workers across 31 countries, employed in organizations with more than 1,000 staff in sectors including finance, technology, manufacturing and public services.

Our analysis offers insights into what employees expect from their work environment and the impact of structured hybrid policies, shifting flexibility needs and resulting retention challenges. These findings reveal key areas for employers to address at a time when cost pressures demand highly strategic investments in the workplace.

Office experience drives policy acceptance but does not guarantee compliance

Not all office attendance policies are created equal

Three years into widespread hybrid adoption, structured hybrid policies¹ are now the norm, with 66% of global office workers saying their company sets clear expectations for the number of days working on-site. While 72% of the global workforce view these policies positively, that acceptance often depends on the overall employee experience.

Employees with a positive view tend to work in environments where business needs are balanced with employee wellbeing – they benefit from quality workplaces, an empowering managerial culture and learning and development opportunities. They value clear expectations and shared routines—50% say office presence supports better teamwork, 43% prefer to work from the office and 35% view hybrid policies as fairer to all employees. They are also more likely to feel their employer is getting the broader environment right: 71% say their company is a great place to work and they report higher satisfaction with office design, wellbeing services, social infrastructure and mobility support.

By contrast, those with a negative view of their organization’s hybrid policies often lack these conditions. Their concern is less about returning to the office and more about the lack of support that makes it a comfortable and worthwhile experience. 40% believe they will be less productive if they are unable to choose their preferred work setting.

Negative perceptions peak among employees who are dissatisfied with their office environment, suggesting that the quality of office experience is paramount to demonstrate the value of working from the office, especially in terms of productivity, teamwork and individual comfort.

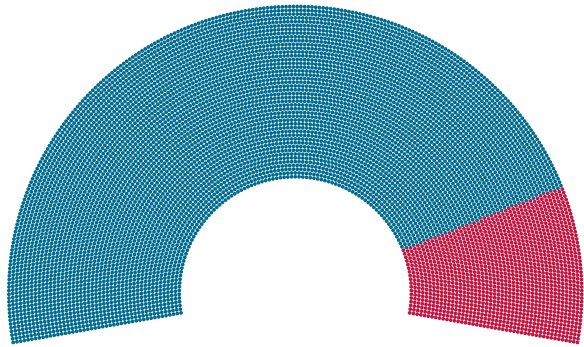
Those with negative views on hybrid policies are also concerned about quality of life (highlighted by 55% of these employees) and feelings of being stuck (42%) or let down (41%). Where the “psychological contract” – employees’ implicit expectations of being valued and supported – is broken, employees seek compensation via increased commuting stipend and flexible hours.

¹ Structured hybrid policies blend in-office collaboration with remote flexibility, offering a balanced approach to work (usually between one to three days on-site). They involve predefined guidelines for when employees need to work from the office, while still allowing for remote work some of the time. Among those policies, a RTO (return-to-office) mandate is a workplace policy that requires employees to work from the organization's offices. These mandates often involve rescinding flexible or remote work policies previously in place and usually require employees to work four to five days on-site.

Great workplaces have a significant impact on structured hybrid policy acceptance

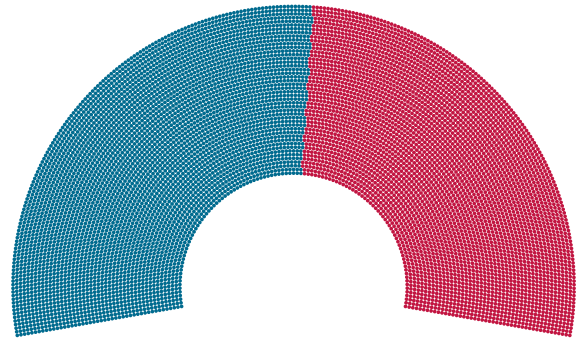
84%

of respondents who are happy with their workplace feel positive about office attendance policies



48%

of those who are not happy with their workplace feel negative about office attendance policies



Source: JLL Research, 2025

Acceptance of hybrid policies varies considerably by region and demographics. Workers in the Middle East and APAC show higher approval than those in Europe. Younger employees, caregivers and managers are more likely to respond positively. These groups appear to benefit more directly from physical presence in terms of visibility, support, comfort, acquisition of professional skills, access to resources, etc.

How do employees feel about their company asking for a fixed number of days in the office?



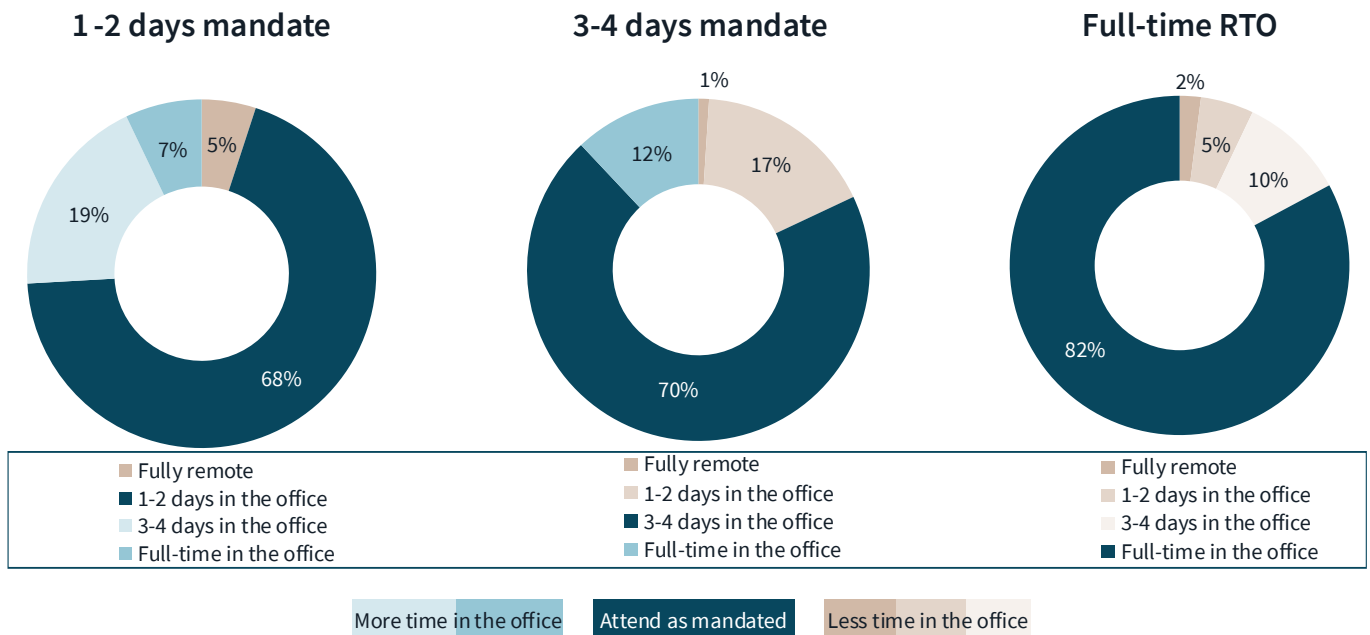
Source: JLL Research, 2025

Acceptance does not always equal compliance

Regardless of mandated days, a gap persists between official hybrid policy and practice. Compliance ranges from 74% in the U.S. to 85% in Europe (with compliance rates above 90% in France and Italy in particular), including those going to the office more than mandated.

- **‘Compliers’ value stability** over amenities, training or flexibility. They often belong to older cohorts and are more likely to be from Europe (Italy, France, Belgium, the UK) and to work in the public sector. Their compliance is less about the workplace’s appeal and more about their tenure, seniority and fewer personal constraints.
- **‘Non-Compliers’ leverage empowerment:** typically younger (notably 30-34 years old), caregivers and concentrated in tech roles in North America, they are highly trained, recent hires and often managers. Strikingly, they tend to work at companies offering more perks (e.g., high-quality offices, childcare, concierge services, free meals, wellbeing programs) but their attendance is more influenced by their individual constraints (e.g., caregiving, commuting time). They report high performance and possess the skillset to navigate job changes, placing them at a higher risk of leaving. Their non-compliance is less a rejection than a calculated decision based on their sense of empowerment – though turbulence in labor markets may change this.

Actual attendance of employees by type of structured hybrid policy



Source: JLL Research, 2025

How companies can address non-compliance

Great office environments matter, but they must be part of a comprehensive strategy addressing the deeper personal and professional drivers of non-compliance:

1. **Personalize the approach.** Tailor policies by career stage and personal circumstances. New parents, senior employees and long-tenured staff have different needs and motivations.
2. **Make office time valuable.** Focus on meaningful in-person experiences over mandates and provide compelling reasons for office presence.
3. **Address retention risk.** Create pathways for high performers to remain engaged without strict compliance. Ensure leaders can have nuanced conversations about individual circumstances.
4. **Support holistic well-being.** Go beyond physical perks to address wellbeing, work-life integration and burnout prevention. Develop community-building programs to combat isolation.
5. **Prioritize engagement.** Track outcomes and contribution, not just attendance. Continuously assess and adjust strategies based on employee life changes and business needs.

Expectations for office experience rise and vary

Despite the level of hybrid policies acceptance, the return to physical spaces has laid bare a mismatch between policy and office experience: almost 40% of global respondents believe their office experience could improve. Top areas of dissatisfaction include building location (traffic, connectivity, safety), workplace environment factors (ergonomics, acoustic comfort) and the quality of amenities on offer (food options). More than other cohorts, younger workers expect access to nutritious food and beverage options. Clear opportunities exist for improvement, but in today's cost-conscious environment, employers must assess which can deliver the greatest return for their workforce.

More than one in three believe office experience could improve

Satisfaction* with Building location	Satisfaction* with the Workplace
Areas where organizations could do more to improve employee experience	
 Environmental quality	 Recharge, support wellbeing
 Neighborhood identity, local character	 Space to meet clients and suppliers
 Neighborhood vibrancy and amenities	 Inspiring, creative environment
	 Immersion in company culture

Source: JLL Research, 2025. *Satisfaction is defined as scores 4 & 5 on a scale from 1 to 5

Again, regional disparities are stark when it comes to the perception of workplace experience, with the Middle East and the U.S. reporting the highest satisfaction (77%), while Europe reports the lowest (51%), particularly in France and Germany – this may be linked to higher expectations in certain localities but also to the quality of the office buildings in each region.² Although managers, caregivers and younger workers report higher satisfaction, they also expect much more from their offices, increasing the pressure on employers to deliver workplaces that are more responsive to workforce needs.

Distinctive workplaces and AI-enabled collaboration

With attitudes to work evolving, offices must offer a commute-worthy alternative to home-working environments. High-quality fit-outs, personalized experiences, a range of amenities and food services, and opportunities for networking and leadership connection define the next-gen workplace sought by employees. Such offices may also integrate more sophisticated collaboration ecosystems, augmented by AI agents and intuitive audio capabilities, to enable richer real-time interactions across distributed teams in and out of the office.

² For more insights about office obsolescence challenges, refer to www.jll.com/en-us/insights/opportunity-through-obsolescence

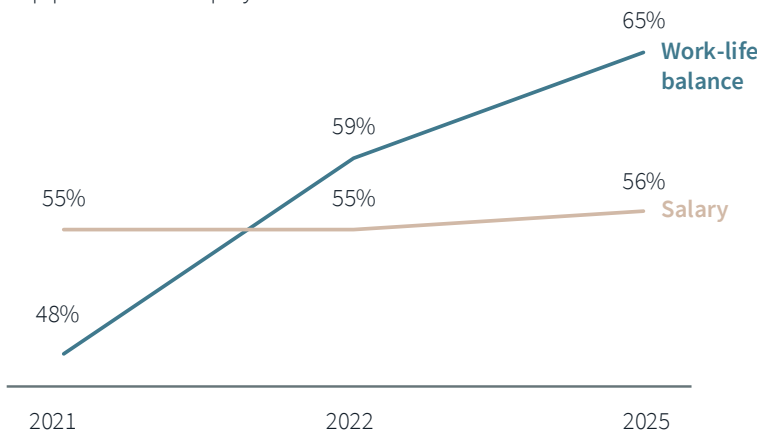
Work-life balance is an even greater priority today

Work-life balance outpaces salary


A higher salary remains the top reason why people look for a new job, but work-life balance has overtaken pay as the leading priority while with a current employer – cited by 65% of office workers globally, up from 59% in 2022. This underscores employees’ need for agency over when and how they value work, and its influence on talent retention. While work-life balance is the top priority across age groups, those aged 18–34 are more driven than others by visibility, rewards and recognition alongside wellbeing and belonging; they look beyond compensation towards fulfillment and lifestyle integration.

Work-life balance: increasingly important

Top priorities for employees



Source: JLL Research, 2025



Work-life balance is the top priority for

65%

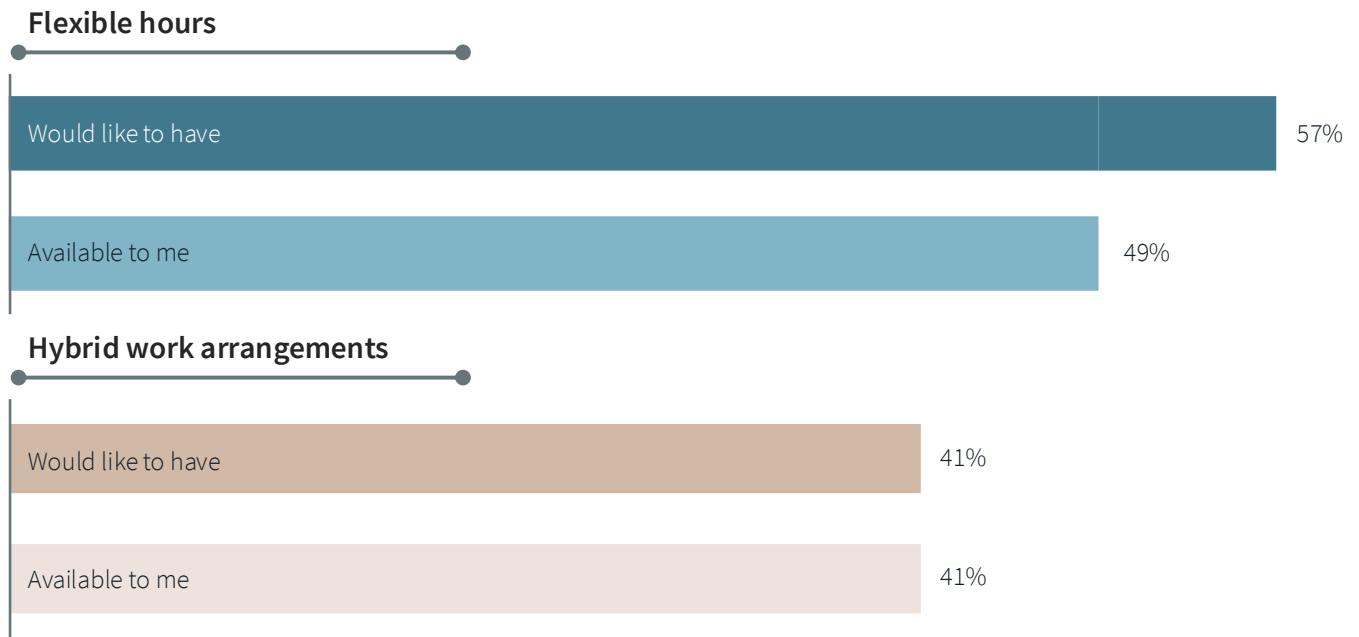
Salary and finding a sense of purpose at work are 2nd and 3rd most important factors

The flexibility gap: expectations versus access

As more workers value autonomy over not only *where* they work but *when*, flexible hours have become key to workplace satisfaction.

57% of employees believe flexible working hours would improve their quality of life, but only 49% currently have access to that benefit. The expectation of flexible hours is high among all genders, ages and geographies, particularly in South-east Asia (Singapore, Philippines, Indonesia, Malaysia). Our survey also highlights that those who enjoy working in the office are significantly more likely to have access to flexible schedules. This points to growing employee expectations for environments built on trust, flexibility and support for true work-life integration, irrespective of access to hybrid arrangements.

Flexibility priorities are shifting from location to time management



Source: JLL Research, 2025

The case for tailored flexibility

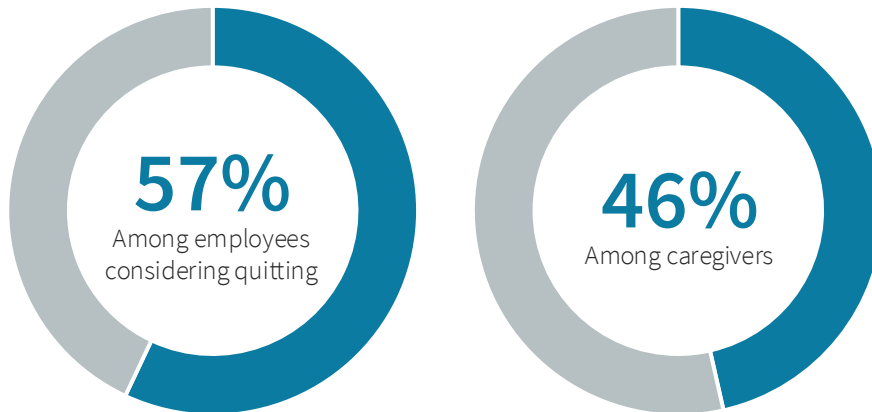
Hybrid arrangements remain critical for 41% of the global workforce, but caregivers have more complex needs: 42% require short-notice paid leave, 33% want remote training options and 43% seek greater hybrid flexibility.

This reinforces the imperative for employers to dispense with a one-size-fits-all approach to flexibility. A modular employee value proposition, offering choice and personalization can help workers align rewards with their lifestyles. And managers must be trained to support diverse workforce expectations.

Rethinking the office itself matters too. Security protocols should allow extended access hours, while smart lighting, HVAC and space-booking systems support flexible work patterns. Allocating seating by neighborhoods for teams or departments can also create opportunities for more dynamic space management, enabling shared workspaces and providing flexibility for employees to work across different spaces and offices. Successful organizations will plan occupancy in real-time, based on forecasted occupants and individual workstyles. This can materially reduce the costs of space provision and optimize occupancy rates while improving employee experience and community building.

Burnout and recognition are reshaping retention

Burnout: the invisible drain on workforce performance in an “always on” world of work



Source: JLL Research, 2025. Note: Self-reported burnout or feeling at risk of burnout, scoring 6-10 on a 10 - point scale, 39% across all survey respondents

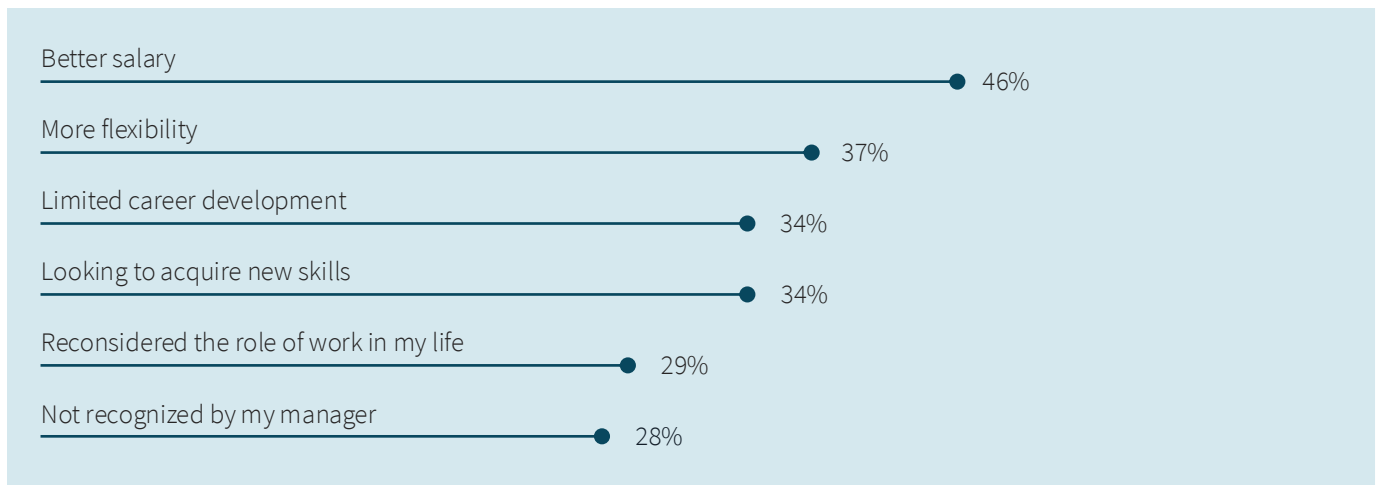
In the hybrid era, burnout has become a serious threat to employers' operations, with nearly 40% of global office workers reporting they feel overwhelmed or exhausted. Rates spike among caregivers, who often hold managerial positions. Though a significant 48% of the workforce identifies as having caregiving duties, primarily for young children or elderly relatives, many feel these pressures are poorly understood and supported at work. Burnout rates are also higher in the tech and banking sectors.

Even more concerning is the connection between burnout and attrition. Among employees who say they are considering leaving their employer in the next 12 months, 57% report burnout, signifying the risk it poses to employee engagement and loyalty.

Psychological contract at risk

While salary and flexibility remain fundamental to retention, our survey reveals a deeper psychological contract: workers today want to be visible, valued and prepared for the future. Around one in three say they could leave for better career development or reskilling opportunities, while the same proportion is re-evaluating the role of work in their lives. Recognition from managers, emotional wellbeing and a clear sense of purpose are now central to long-term retention.

Top reasons for leaving the employer



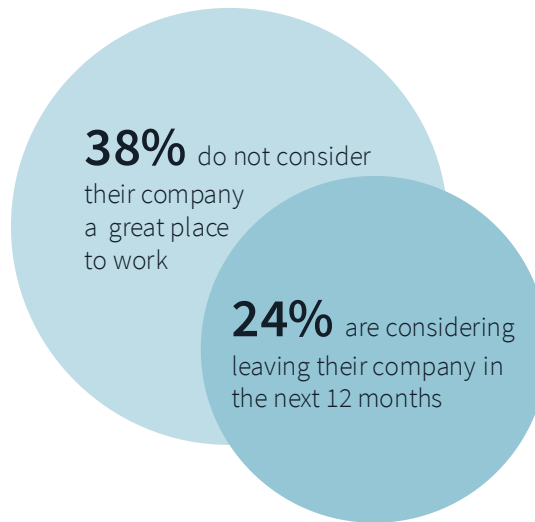
Source: JLL Research, 2025

This is particularly true for mid-career employees who shoulder caregiving duties or managerial responsibilities: a group under pressure at work and at home, juggling new tools and digital environments amid an urgency to reskill to secure employability. Many say their company isn't a great place to work and score lower on indicators like connection to company culture, wellbeing, collaboration and the quality of their work environment.

Those with one to five years' tenure—another high-risk group—tend to work remotely more than expected and report lower engagement, empowerment and connection, probably because they were hired during the pandemic without a full induction into company culture.

Together, these patterns suggest that retention now hinges less on perks and more on how well organizations respond to the full context of their employees' lives. This creates an opportunity for the physical workplace to play an integral role in creating a genuine sense of culture and belonging.

Nearly a quarter of employees are considering quitting their job in the next 12 months



Source: JLL Research, 2025.

Implications for employers

The 2025 Workforce Preference Barometer reveals a workplace that is more structured and more accepted, but with higher expectations placed upon it. Employees tend to comply with office attendance policies, but engagement hinges on the quality of work environments and overall experience delivered. Work-life balance is now a universal requirement, centered on time management beyond the place of work. While salary and flexibility remain fundamental, employers that focus solely on these factors risk falling short: addressing the emotional dimensions of work—burnout, purpose, recognition—are critical to sustaining performance and long-term retention.

Meeting these expectations in a cost-conscious environment will require organizations to assess which measures can deliver the desired returns for their business outcomes. Our findings suggest several priority actions for employers:

The physical workplace

- **Coordinate teams' locations and presence to make the commute worthwhile**, ensuring opportunities to collaborate, strengthen culture, spend time with managers or engage in informal learning.
- **Create differentiated office environments**, with high-quality finishes, personalized amenities, nutritious food options and modern social spaces.

- **Leverage technologies** to create AI-enabled collaborative environments and make office spaces more responsive, accessible and community-oriented.
- **Use the physical workplace to strengthen company culture and professional growth**, providing opportunities for recognition, community, networking and mentorship.

The broader experience

- **Tailor employee value propositions**, including varied amenities and flexibility options adaptable to different life stages and responsibilities.
- **Expand flexible policies** to emphasize autonomy over working hours and support short-notice leave, and tailor options to distinct employee groups.
- **Establish holistic wellbeing programs** addressing mental wellbeing, caregiving support and burnout prevention—especially for high-risk groups like managers and caregivers.
- **Invest in manager training** focused on emotional intelligence, remote leadership and awareness of team pressures.
- **Continuously gather and act on employee feedback**, segmenting strategies by demographics, roles, tenure and regions to keep policies adaptive and relevant.

Today, the workplace must do more to earn its place in employees' lives. The most successful organizations won't simply adapt to change but will intentionally design for it, focusing on what their talent truly values.

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