



# 2023 culture report

**RTO / Future of Work • A Roundtable Discussion**

Key takeaways  
2023

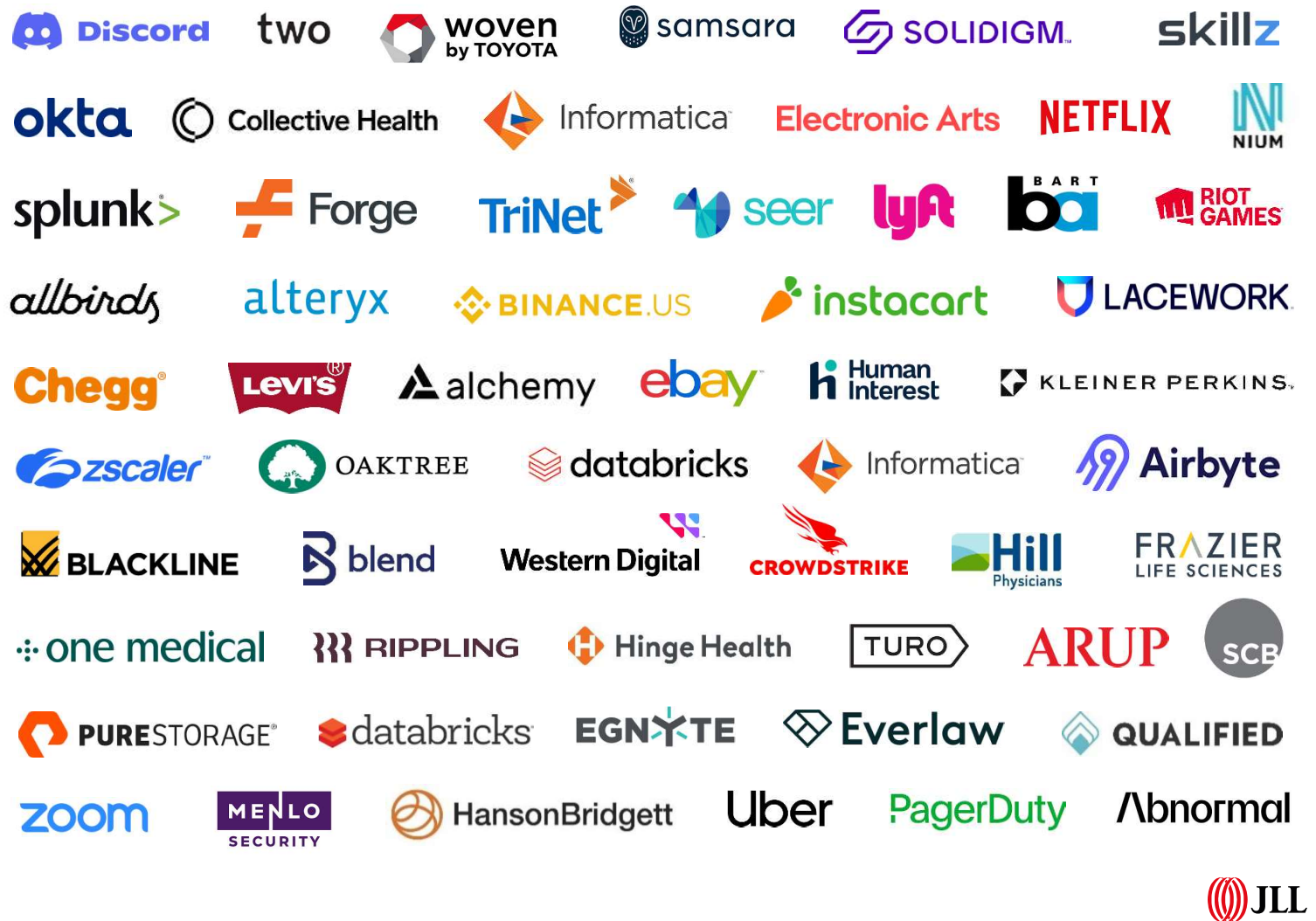
 **JLL** SEE A BRIGHTER WAY

# Our participants

Geographies include San Francisco, Silicon Valley, NYC & Los Angeles

VC to Series A to Post-IPO

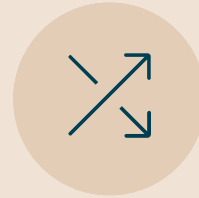
Companies with 100 employees to ~20,000



# About this report



The post-pandemic workplace strategy continues to evolve, and the role of culture is emerging as a powerful variable.



How does culture impact space strategy to drive tangible business success?



JLL hosted multiple culture round table calls with leaders on the front lines of real estate and workspace strategy from over 60 of the world's top and emerging technology companies. Here are a few key takeaways...

*\*The information in this report has been anonymized.*

# We asked, you answered



“What percentage of your people are currently returning to your office?”

—  
**33%**

“What percentage of your people do you want to return to your office?”

—  
**62%**

# Challenges at hand

How do we drive executives to RTO consensus?

Are our people as productive as they could be?

Creating culture in a remote environment.

Is hybrid working?

Creating culture in a remote environment.

If on-site is the new off-site, how do we change the design of the office to support?

The balance of wellbeing, health and productivity?

What are my peers doing?

How do we manage the days when everybody comes in?

How do I support preferences and needs across demographics?

Free food isn't getting people back.

Is remote work degrading our culture?

# Summary of key takeaways

*"The less we mandate/force office return, the more people come in. They want the power to choose."*

## Culture activates space

We need to clarify our mission and our values.

If our mission was widely understood, embraced and personalized, people could be more engaged.

**If we activate our culture, we could create a magnet to replace a mandate. How do we activate our culture to drive in-person engagement?**

Exposure risks do not appear to be the strongest deterrent whereas one year ago this was the case.

Everyone agreed that data is powerful in driving workplace decisions, but without large numbers of employees in the office yet, the primary driver in a company's workplace decision typically comes down to its culture objectives.

How do we ensure our space activates our purpose?

Intentional culture strategy has a chance to activate space, accidental culture strategy has no chance.

Leveraging the uniqueness of your culture can create experiences worth experiencing.

You can create the space, but it's the people who make it where you want to be.

## Leadership must model

We have established clear return to office guidelines, but our leaders need to be better at modeling the established office engagement.

The office doesn't bring people back, leadership does.

Executives have established a clear mission and vision, but our people aren't inspired and need consistent reminders of what we do and why we do it.

Leadership focuses primarily on results... do they miss an opportunity to establish more trust and commitment?

Managers are the key... are they cascading effective communication from executives and modeling the values and the desired return to office guidelines?

**Employees don't follow mandates. They follow leaders.**

Many are not "mandating" RTO though some are strongly encouraging based on their company / executive culture.

## People want the office

The office is not only centered around driving collaboration and teamwork, but it is also a place where people can perform heads-down work away from the many distractions at home; employees increasingly want quiet places at the office.

There is an increased desire for what was naturally "water cooler" conversations. Impromptu connections increase organic knowledge sharing.

The less we mandate/force office return, the more people come in. They want the power to choose.

**Young/early career employees need/want in person connection to establish leadership foundations.**

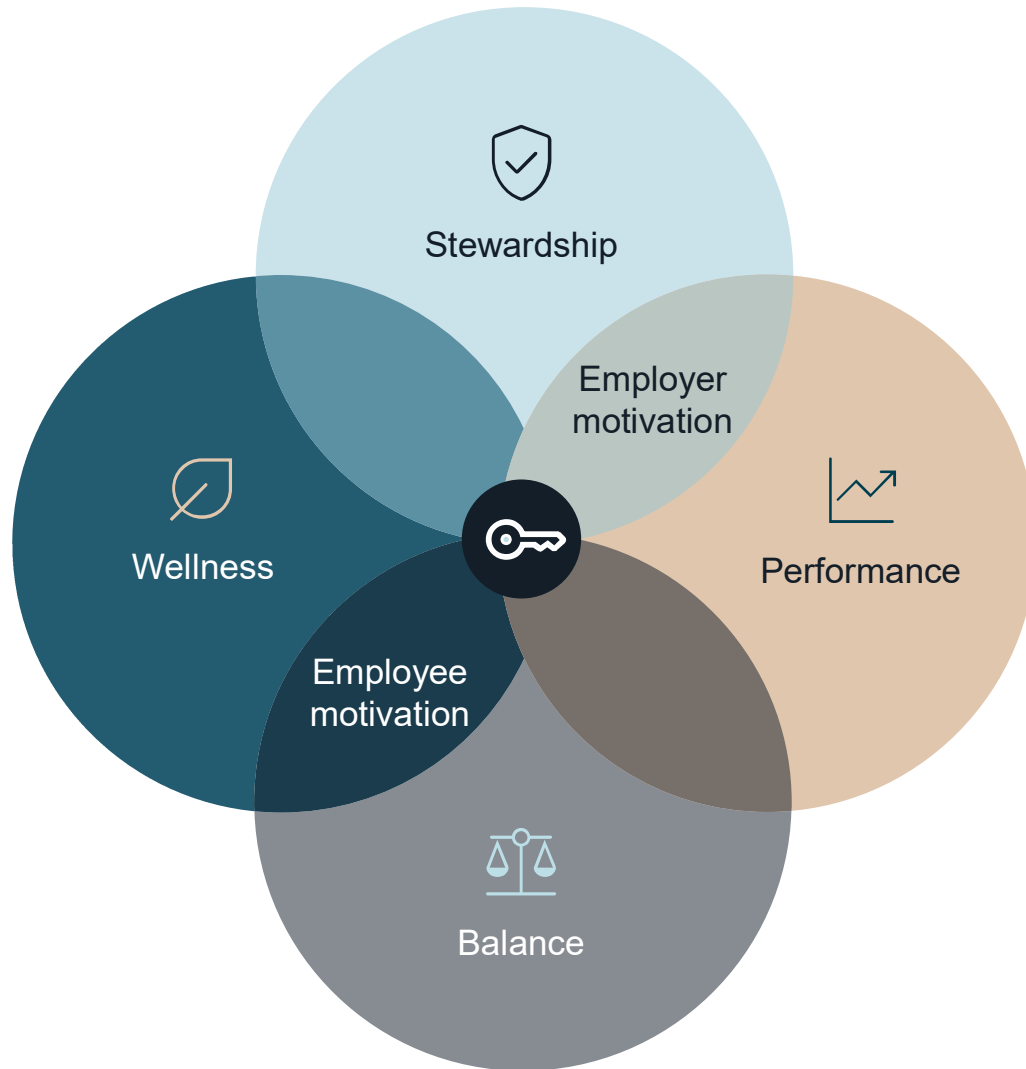
Leaders agree that connections and friendships between employees and management is one of the highest factors in high retention rates.

When people are invited into a compelling story that reframes the office as the workspace of choice, they want it. Story creates buy in and engagement.

# Tools and data



# Return to office (RTO) motivations



Source: JLL Workforce Preferences Barometer 2023

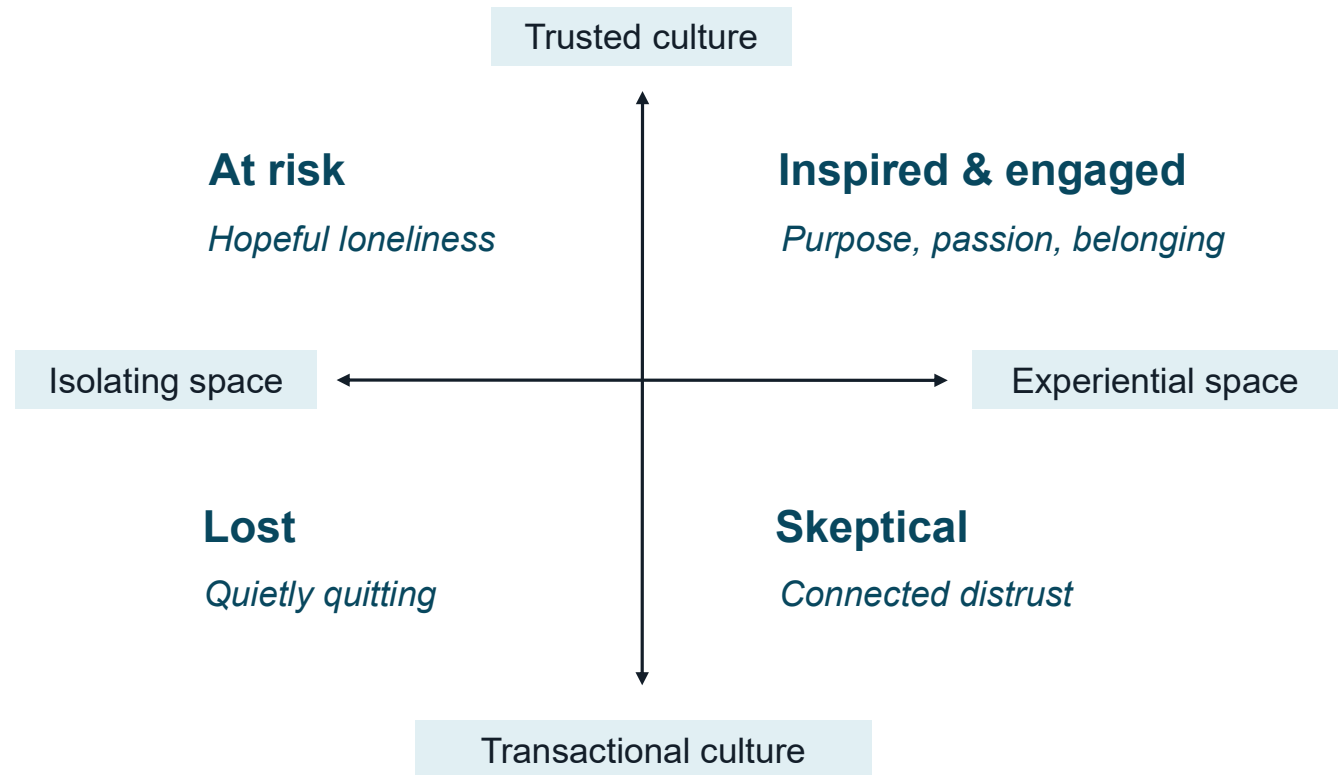


# How culture + space drive RTO

Culture + space matrix

Where are you?

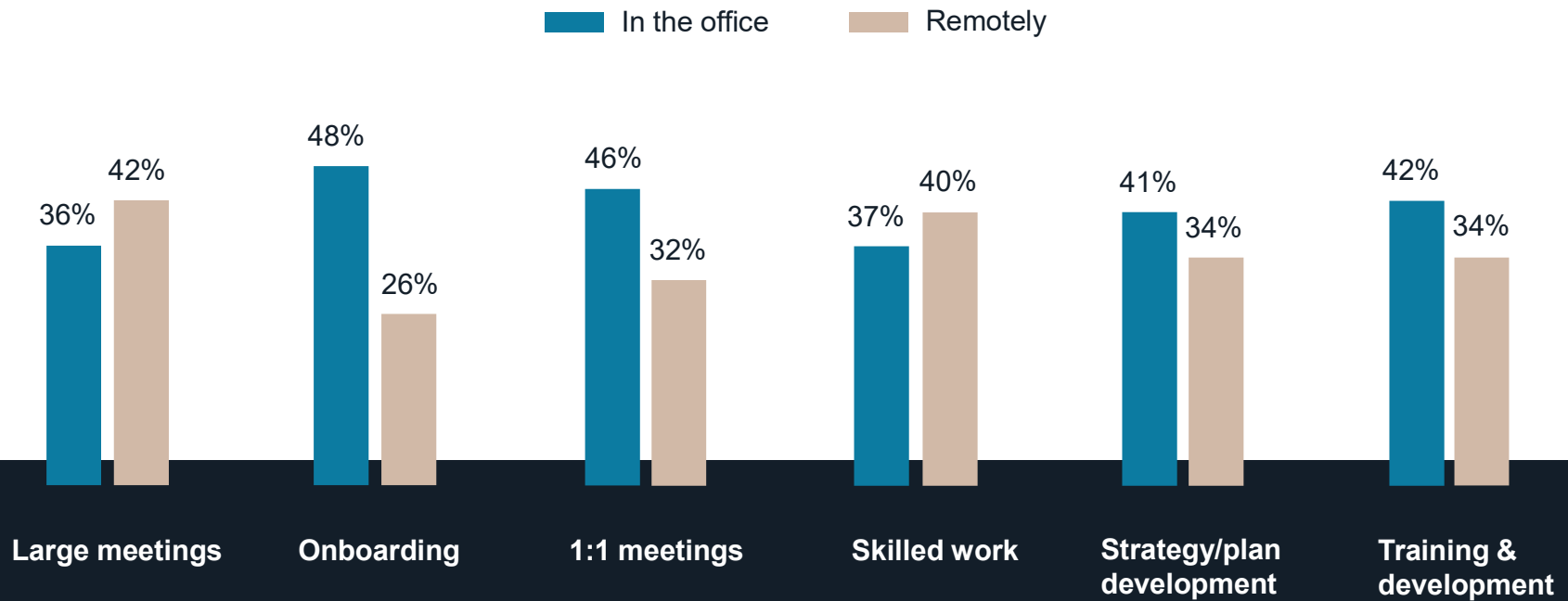
Where do you want to be?



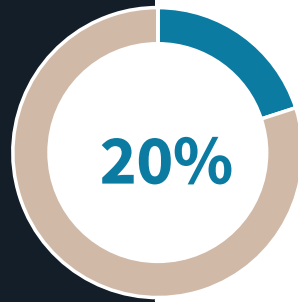
# People prefer the office

Employees prefer doing skilled work and attending large meetings from home. For everything else, they prefer the office.

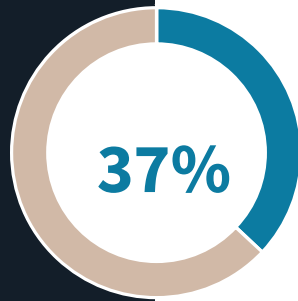
**% of knowledge workers who prefer to do tasks in the office vs. remotely**



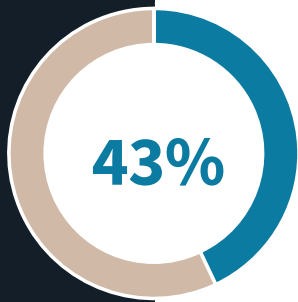
# Top 3 current culture challenges



Lack of team and/or organizational trust



Isolated / individual mindset



Clear mission, vision and values, but little to no activation around language



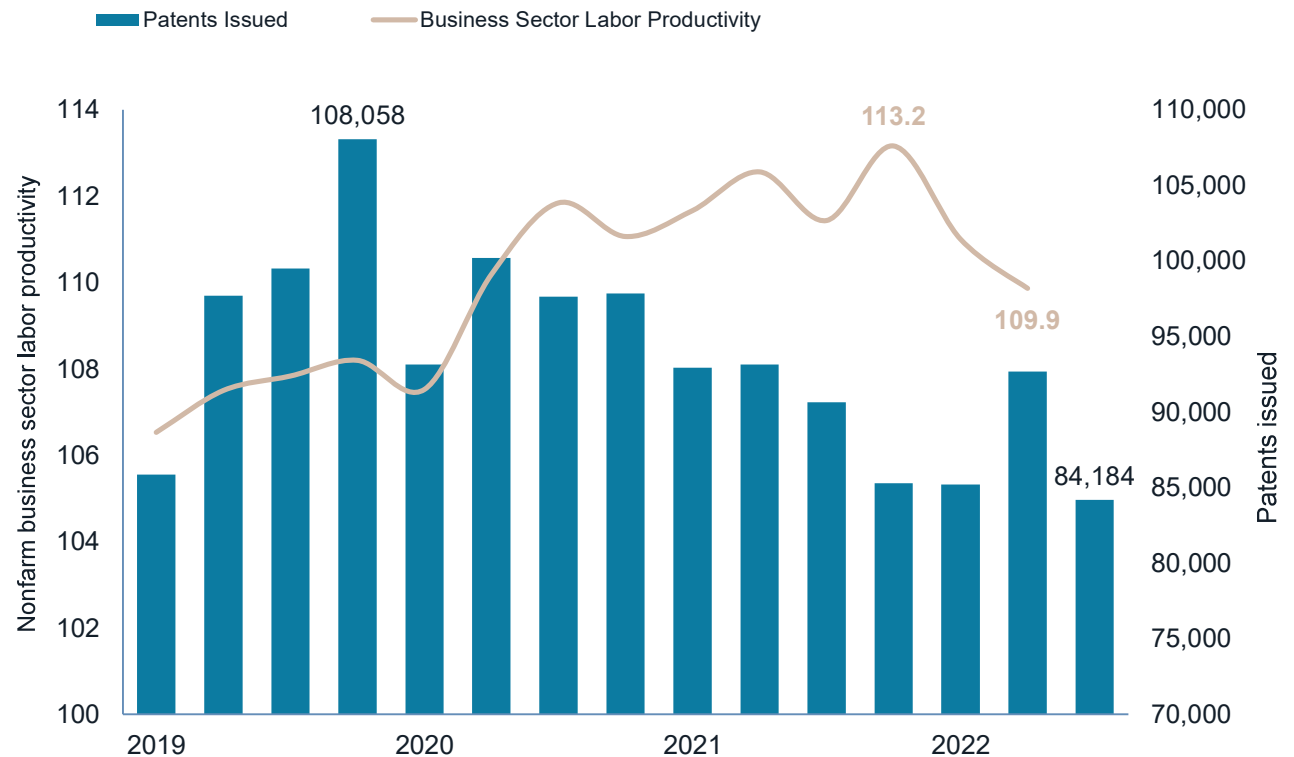
# Prolonged remote work is weighing on productivity and innovation

With the peak of the public health crisis in the past, prolonged remote work is showing evidence of negatively impacting productivity, as nonfarm business sector labor productivity has fallen 2.9% from peak levels over the past two quarters, driving growth since the outset of the pandemic below long-term averages.

Indicators of innovation similarly have peaked and are declining—newly issued patents over the past 12 months have declined 7.3% year-over-year and 11.1% from 2019 levels, providing strong evidence that companies across industries are submitting a waning volume of new patent applications.

Executives of large companies across industries have increasingly identified improving productivity as a primary means of combatting macroeconomic headwinds.

Negative trends in productivity and innovation may drive employers to increasingly mandate office attendance, as well as continued investment in upgraded office space.



# How to build high trust culture

<b>Who</b>	Executives	Leaders	Teams
<b>What</b>	Name it	Live it	Build it
<b>Why</b>	Language creates culture	Leaders model culture	Team multiply culture

**How**



Manager's roadmap

## What kind of culture do you want?

Executives, your language creates the foundation of your culture.

# Next steps

## Summer 2023 In-Person Lunch and Learns

### Lunch & Learn Registration

If you are interested in being part of an in-person lunch and learn to continue the conversation of how culture and space drive intentional RTO strategies, please email [lv.hanson@jll.com](mailto:lv.hanson@jll.com).



Your Host:

**LV Hanson**

*SVP, Culture & Leadership*



Thank you

