



Research brief

Global findings on workplace re-entry during COVID-19



May 2020

How organizations are planning for workplace re-entry during COVID-19

As the COVID-19 pandemic spread throughout the world, the shutdown of workplaces happened suddenly and with little warning. Re-entering the workplace, however, will likely happen very differently – gradually and with meticulous planning.

JLL gathered insights from more than 80 organizations in 13 industries across the globe in mid-April and again in mid-May about work-from-home sentiments and re-entry plans and strategies. The data reveals that while

more organizations are planning their re-entry strategies in mid-May than in mid-April, more than 50% still don't have a set target re-entry date. This is likely due to the complexities involved in safely returning employees to their workspace: enhancing facility/building protocols; adjusting workspaces to accommodate social distancing; and assessing employee readiness to return. Re-entry is also largely dependent on local government actions such as the easing of shelter-in-place mandates.

Work-from-home programs

Globally, more than three-quarters (77% in mid-April, 79% in mid-May) of organizations reported that 80% or more of their employees are working from home during both months. APAC saw an increase of 25 percentage points in organizations reporting that 80% or more of their employees working from home in April, while in EMEA there was a decrease of 13 percentage points.

We're in the midst of the largest work-from-home pilot ever conducted, and research indicates that long-held attitudes about remote working may be shifting globally. Despite the normal working-from-home challenges, such as family distractions and slow internet access/bandwidth, 20% of organizations report an increase in collaboration and 12% report an increase in productivity while working from home. As a result, organizations can take the time to develop a safe, methodical approach to re-entry.

Percent working at home	AMER		APAC		EMEA	
	April	May	April	May	April	May
< 20	0%	3%	0%	0%	0%	0%
20-39	0%	0%	6%	6%	0%	0%
40-59	3%	0%	6%	13%	0%	0%
60-79	9%	9%	22%	13%	8%	36%
80 or more	86%	85%	44%	69%	77%	64%
Unknown	3%	3%	22%	0%	15%	0%

Re-entry dates

In mid-April, 80% of respondents had not set a target re-entry date, acknowledging that it is too early to plan, or that it's necessary to wait for local health officials to decide conditions are safe for re-entry. In mid-May, more organizations report being focused on planning re-entry strategies, but 58% of respondents still did not have a set target re-entry date. This suggests that as organizations start discussions about re-entry, they are realizing it more complex than they first thought. There are significant costs to consider related to enhancing cleaning protocols, making workplace adjustments for social distancing, and implementing other guidance to ensure health and safety of workers. Additionally, the fact that the impact of COVID-19 varies considerably by local geography only adds to the complexity.

The data also reveals that regions are on different re-entry timelines. In APAC, nearly one-third of respondents have already started re-entry as of mid-May. No respondents from EMEA had started re-entry as of mid-April, but the mid-May survey shows a significant increase, to 27% having started the re-entry process. In the Americas, timing is still largely unknown: In mid-April, 81% did not have a planned date for re-entry; as of mid-May, the number is still over 65%.

Timing	AMER		APAC		EMEA	
	April	May	April	May	April	May
Already started re-entry	0%	6%	11%	31%	0%	27%
No plan at this time/unknown	33%	41%	39%	12%	23%	18%
Awaiting health official approval	48%	26%	44%	31%	46%	9%
April 2020	1%	0%	0%	0%	15%	0%
May 2020	13%	6%	6%	6%	15%	27%
June 2020	4%	17%	0%	19%	0%	9%
July 2020	0%	5%	0%	0%	0%	9%

Percentages may not add up to 100 due to rounding.

A phased approach to re-entry

Organizations are planning for phased re-entry as they determine which workers are essential to return to the office.

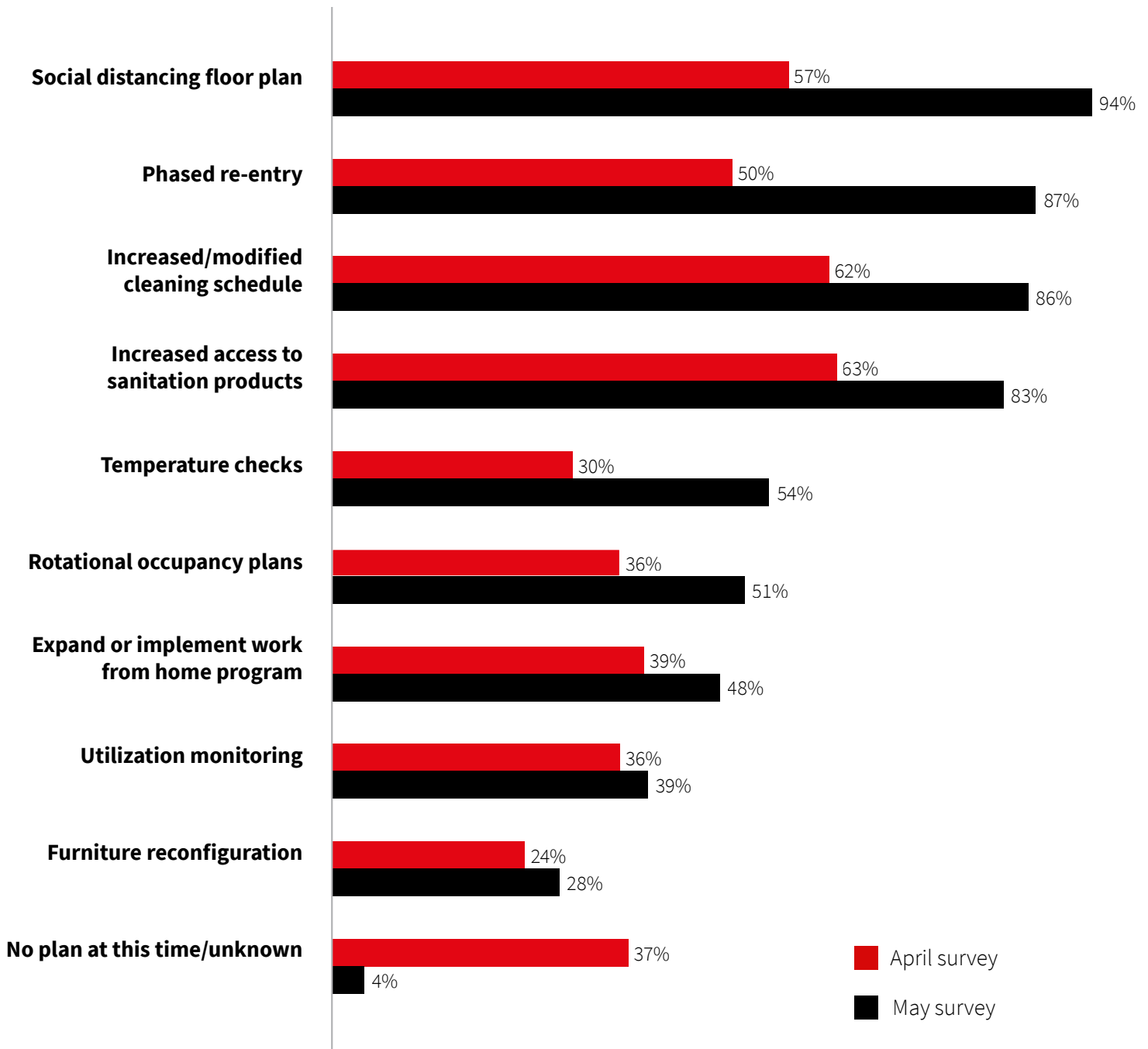
As of mid-May, nearly a third (31%) of organizations in APAC are planning for more than 40% of their workforce to return to the workplace. In the Americas, 29% of organizations are planning for 20-29% of their workforce to return, while 17% are planning for more than 40% of their workforce to return. In EMEA, approximately half of organizations are planning for 20-29% to return while the other half are unsure.

It is clear however, that most organizations are not planning to return all of their employees to the workplace. As recovery continues and more data and information are collected and communicated, we expect different plans to take hold as uncertainty wanes.

Re-entry strategies

As the pandemic continues, the number of respondents globally considering a phased re-entry strategy increased by 37 percentage points from April to May. Respondents contemplating adopting social distancing floor plans also increased by 37 percentage points from April to May. These

top strategies will likely be combined with a variety of additional measures to promote health and safety. In April, almost 37% of respondents did not have any plans in place—now, virtually all are considering strategies to address their organization’s specific needs.



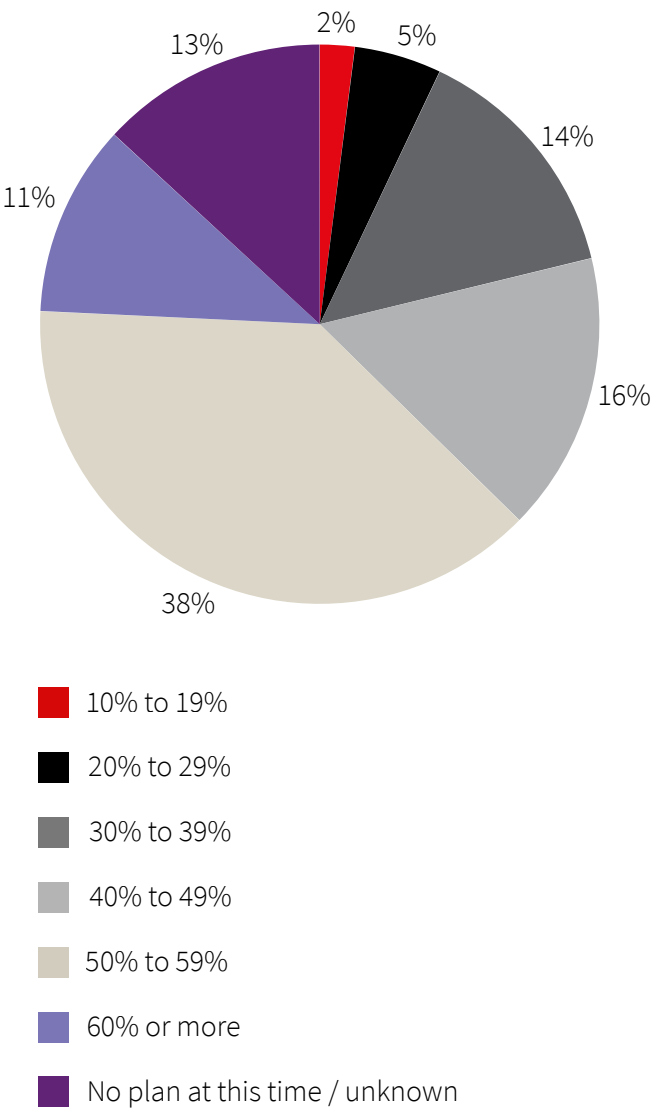
Space de-densification for social distancing

For the past several years, our occupancy benchmarking research has shown that organizations have been increasingly allocating less square footage to individual desks. It's clear that safely re-entering the workplace will require a reversal of that densification trend, at least for the near-term.

As of mid-May, the JLL occupancy planning team has developed social distancing plans for approximately 149 million square feet of our clients' real estate portfolios. Among clients for whom we have developed social distancing plans, 49% are reporting that they are losing 50% capacity or more on their floors.



Average de-densification reduction (new seat capacity / current seat capacity)



Percentages may not add up to 100 due to rounding.

Rotational scheduling for social distancing

Rotational scheduling offers a flexible solution for organizations that are actively planning for re-entry. Forty percent of respondents are implementing one of the following three methods of rotational scheduling:

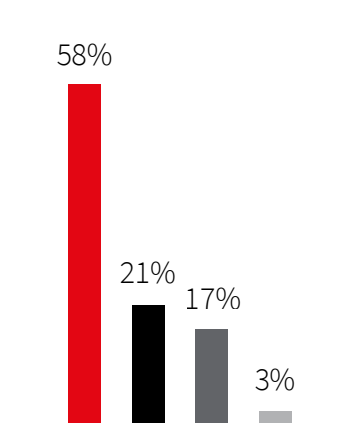
1. Rotation groups assigned to a person (employee's team or function determines the rotation they are assigned to)

2. Rotation groups assigned to a seat (employees' assigned seat determines the rotation group they are assigned to)
3. Mobility (employees are assigned to a rotation group and employees can choose where to sit)

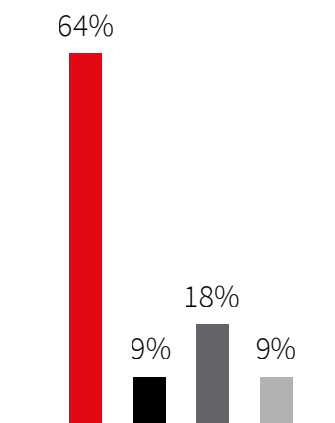
In the Americas, 21% of respondents indicated they are using rotation groups assigned to a seat. In EMEA, 18% of organizations reported using rotation groups assigned to a person. In APAC, all three methods are being implemented equally.

Rotational scheduling methods

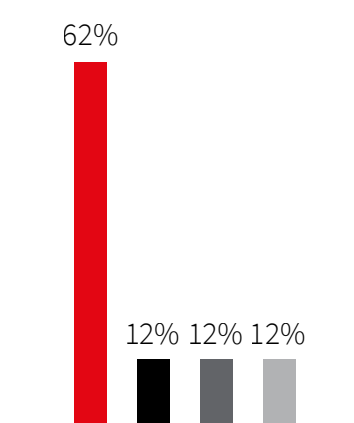
AMER



EMEA



APAC



- Mobility (employees are assigned to a rotation group and employees can choose where to sit)
- Rotation group assigned to a person (employee's team or function determines the rotation group they are assigned to)
- Rotation group assigned to a seat (employee's assigned seat determines the rotation group they are assigned to)
- No plan at this time/unknown

Percentages may not add up to 100 due to rounding.

Looking forward: A three-pronged approach to re-entry

The future is uncharted territory. As conditions stabilize, organizations will need to reflect on the long-term business impacts unique to their organizations. If carefully planned, the strategies put in place during the re-entry phase can be a key first step toward building flexible and resilient workplaces for the long term.

JLL is here to help organizations implement a three-pronged approach to reactivating space, which requires a clear occupancy strategy, guidelines and protocols, and compliance with those guidelines to minimize risks.

1

Develop your occupancy re-entry strategy

- De-densification thresholds
- Risk point mapping
- Communication & change management plans

2

Establish guidelines and protocols

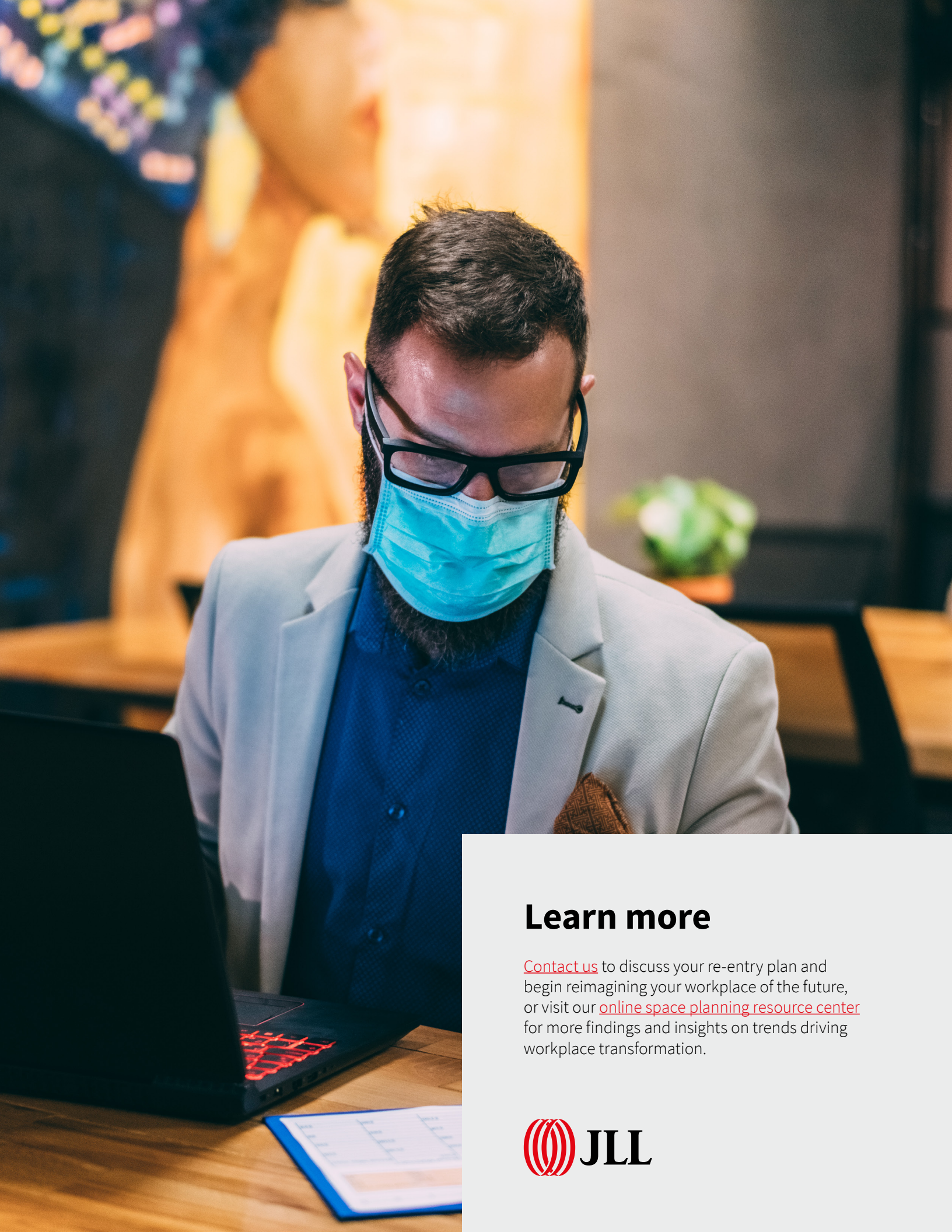
- Social distancing plans and guidelines
- Rotational schedules and desk assignments
- Workspace adjustments
- Remote work support

3

Ensure compliance to guidelines and protocols to minimize risks

- Attendance monitoring/ utilization tracking
- Seat reservation system management





Learn more

[Contact us](#) to discuss your re-entry plan and begin reimagining your workplace of the future, or visit our [online space planning resource center](#) for more findings and insights on trends driving workplace transformation.

