Beyond Mandates: The Future of Hybrid Work

JLL Workforce Preference Barometer 2025

Key highlights -Luxembourg

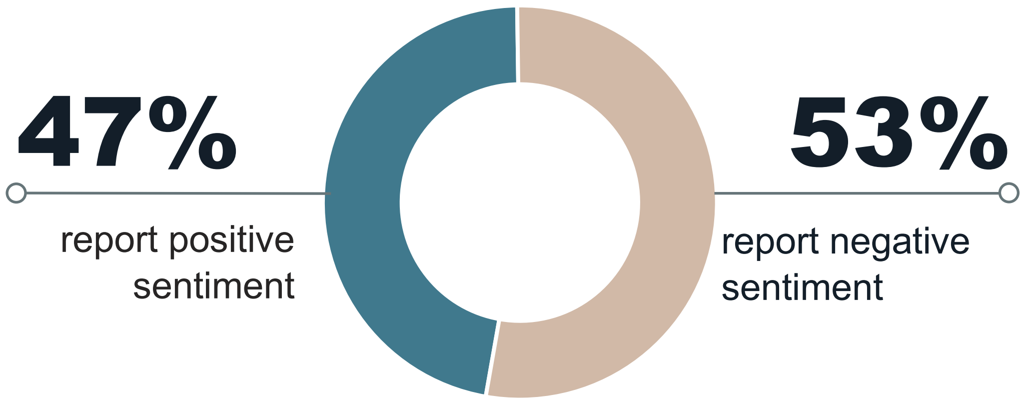
- **Employees hold mitigated feelings on company attendance policy.** In Luxembourg, 55% of office workers are subject to structured office attendance policies, below the EU average of 64%. However, employee sentiment in Luxembourg is more divided than in other European markets.
- **The desire for work-life balance is stronger than ever,** outweighing salary. The desire for work-life balance has intensified in Luxembourg, with 69% prioritizing it over salary (up from 67% in 2022). Flexibility needs are shifting towards time management over location, with 61% of office workers wanting flexible hours while hybrid arrangements have reached equilibrium (31%).
- **Wellbeing concerns, particularly burnout, pose a persistent threat to organizational outcomes.** Wellbeing concerns persist as critical retention factors, with 31% of employees in Luxembourg experiencing burnout and 20% feeling isolated, though 59% report feeling empowered at work.

Office experience drives policy acceptance in Luxembourg

Structured hybrid policies are now standard

While structured hybrid policies are becoming the norm globally, Luxembourg presents a unique case study. Despite 55% of workers having structured office attendance policies resulting in an average of 3.8 days spent in the office a week, the acceptance rate is notably lower than other European markets (55% in Luxembourg against 66% in Europe).

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



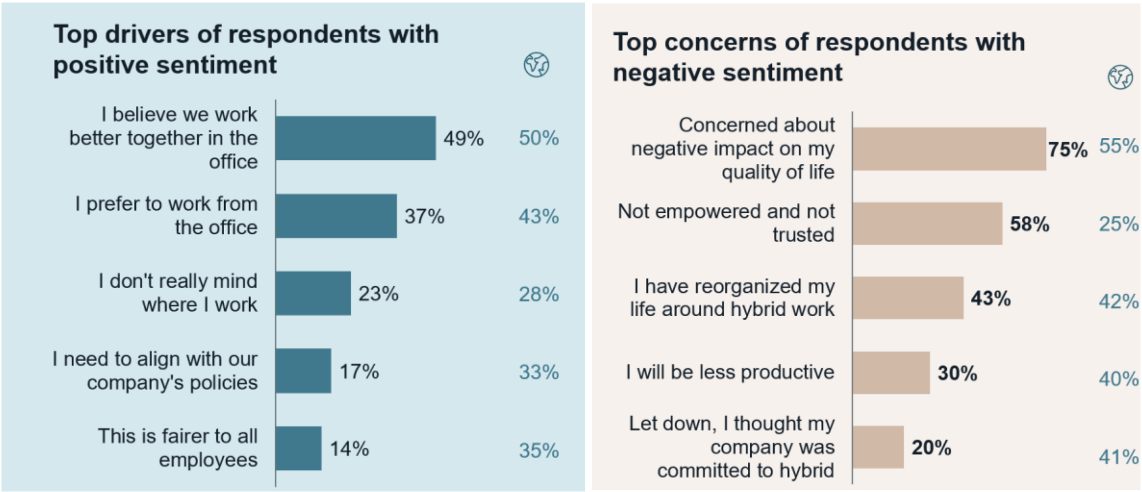
Source: JLL Research 2025

Structured attendance policies induce mitigated feelings among employees, divided into two roughly identical parts. The 47% positive sentiment rate contrasts sharply with the 53% negative sentiment, indicating that Luxembourg employees are more resistant to structured policies than their European counterparts but comply for fiscal reasons.

High policy acceptance despite quality concerns

Luxembourg workers have high expectations for their office environments, with office experience quality directly linked to policy acceptance. Only 35% consider their work environment close to ideal, while 65% believe their office experience could be significantly improved - above the EU average of 51%.

Among drivers of positive sentiment towards office policies (47%) are the collaborative and cultural values; while the 53% of Luxembourg workers with negative sentiment towards office policies express concerns that go far beyond simple location preferences, focusing on fundamental issues of autonomy, life organization, and trust.



Source: JLL Research 2025

Fit-out, services and amenities can significantly enhance workplace experience

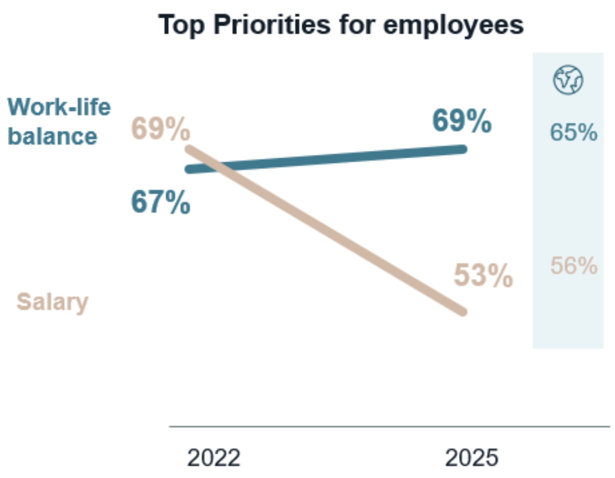
Our global survey reveals that 65% of office workers in Luxembourg believe their office experience could be enhanced, with the most requested building improvements being acoustic comfort (49%), biophilic elements through plants and greenery (47%), and modern design (45%).

On the other hand, the building location and available services also directly influences the occupier's day-to-day experience. Luxembourgish office workers identify wellbeing and sport services as the most valued amenity (53%) followed by modern design (45%) and comprehensive food services (37%) and local amenities partnerships (35%) to create environments that justify the commuting time and support both productivity and quality of life.

Work-life balance is an even greater priority today

Work-life balance takes priority over salary

Luxembourg employees demonstrate the global shift toward prioritizing work-life balance, with 69% identifying it as their top priority, up from 67% in 2022, surpassing salary considerations dropping from 69% in 2022 to 53% today. This trend reflects a fundamental shift in employee expectations and values across the Luxembourgish workforce. It is the first time that work-life balance has outweighed salary. This is following the global trend.



Work-life balance is the top priority for

69%

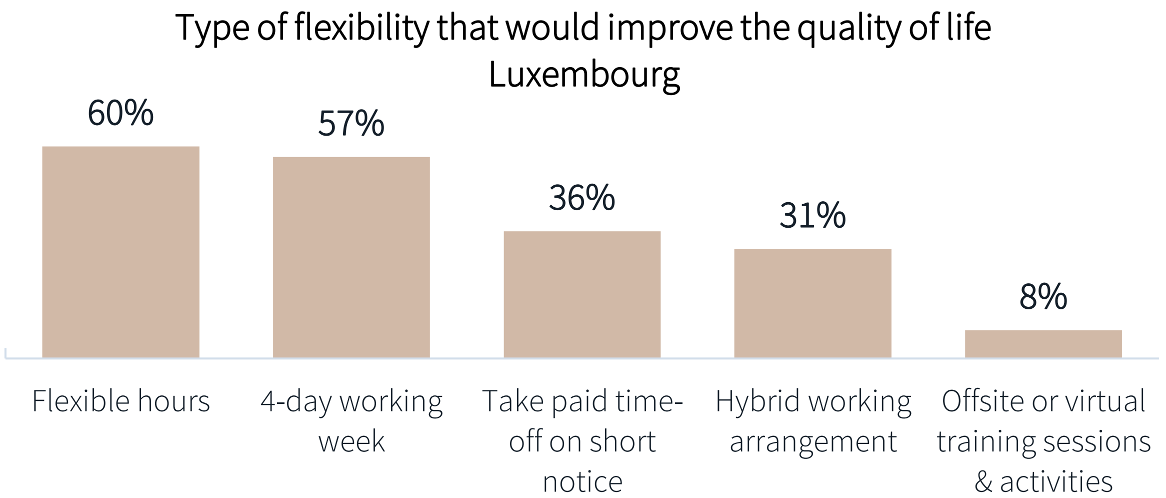
Salary and finding a sense of purpose at work are 2nd and 3rd most important factors

Source: JLL Research 2025

The flexibility priorities are shifting from location to time. Hybrid work arrangements are meeting employee expectations in Luxembourg as there is no difference between employees benefiting from them and those who desire them (31%). This shows reasonable alignment between current work conditions and desired work arrangements.

Today the workforce expectations go towards more flexible hours to hence better time management, work life balance and improved commute time (60% desire flexible working hours). Another great improvement linked to time would be a 4-day week (57% would like to adopt this option).

Having successfully addressed location flexibility, Luxembourg companies are now focusing on temporal arrangements.



Source: JLL Research 2025

Burnout and isolation remain a concern. However, employees feel also empowered, supported and encouraged to take initiative

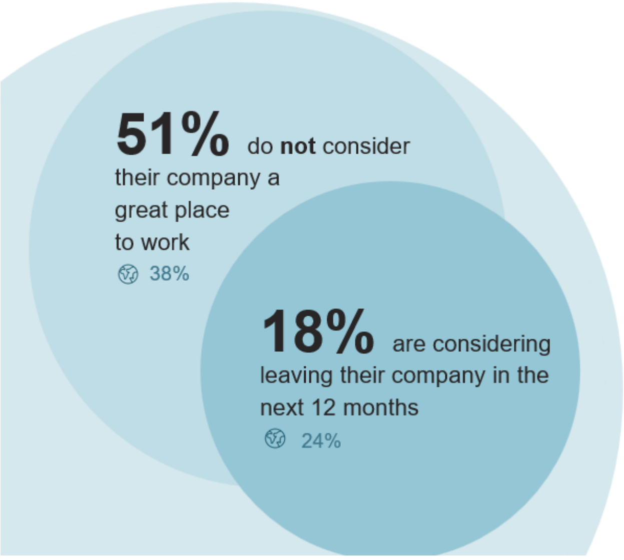
Work-life balance

Despite positive office policy acceptance, Luxembourgish employees continue to face significant wellbeing challenges. Nearly one-third (31%) report experiencing burnout, while one-fifth (20%) feel isolated at work—both figures notably lower than the global averages of 39% and 38% respectively. However, there is encouraging news: 47% of employees in Luxembourg feel empowered at work (supported and encourage to take initiative by their managers), suggesting that organizations in Grand Duchy of Luxembourg are performing better than the global average (35%) in creating supportive workplace environments.

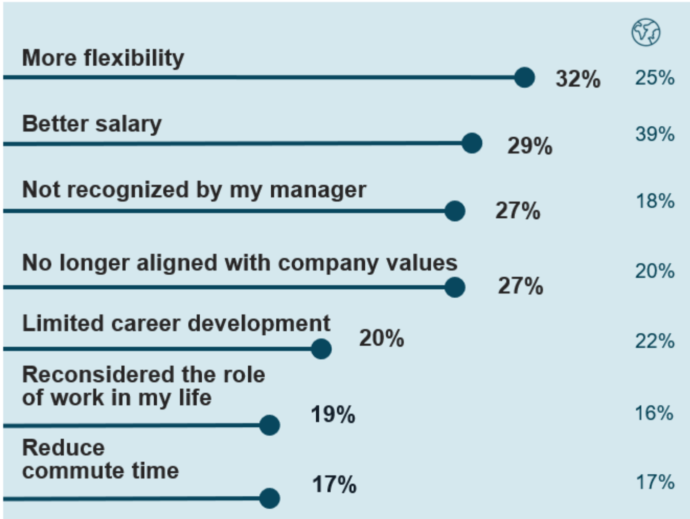
Lower turnover risk

Luxembourg shows relatively lower turnover intentions, with 18% of employees considering leaving within 12 months compared to nearly 24% globally. However, 51% of workers in Luxembourg don't consider their company a great place to work, indicating substantial room for improvement in employee’s experience.

The primary reasons Luxembourgish employees consider leaving include flexible hours (32%), better salaries (29%) and no recognition of the management or no longer aligned with company values (27%). Limited career development (20%) and reconsidering the role of work (19%) are also game changers, the improved commuting time accounts for 17% as a motivation to change employer.



Top reasons for leaving



Source: JLL Research 2025

Implications for employers in Luxembourg

The workforce in Luxembourg demonstrates mature acceptance of hybrid policies while maintaining high expectations for workplace quality and flexibility. To capitalize on this foundation, Luxembourgish employers should:

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.

Expectations for office experience rise and vary from one country to another and lies high among workforce in Luxembourg as 65% consider it could significantly be improved. Despite the level of hybrid policies acceptance, the return to physical spaces has laid bare a mismatch between office attendance policy and office experience: the commuting effort must be rewarded by qualitative workspaces including acoustic and thermal comfort, efficient ergonomic and design and offer qualitative amenities surrounding the office.

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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