Are the needs of your business and employees changing faster than your workplace can keep up? If so, you’re not alone.

Technological and social changes have been radically transforming workplaces since the dot-com era. But the speed of change is now quickening like we’ve never seen. Organizations of all sizes, across all industries, are accelerating their efforts to deliver future-focused workplace strategies that inspire a more productive, mobile workforce.

Workplace planning was easier when knowledge workers spent most of their day at their own desk doing heads-down work, and headed to a conference room for a meeting or two.

Today, however, the average knowledge worker is at their desk only 40% of the time, according to the Gartner Group; and Intuit research indicates 80% of all work is collaborative. More people are also working elsewhere—at home, cafes, coworking spaces and even decked out lounges within their own workplace.

As workplaces transform to incorporate more collaboration areas and activity-based work areas, occupancy planning is in the midst of its own revolution. Workplace leaders are waking up to the promising opportunities offered by new technology tools, like utilization tracking, predictive analytics, artificial intelligence (AI) and cognitive technologies. They’re seeing how real-time utilization insights can help them keep up with rampant digital and social change.

By tracking utilization, we uncover valuable insights so teams can drive real productivity increases. We can trim pointless spending on large offices in favor of more collaborative space. We can appeal better to millennials and others who prefer an ‘anytime, anywhere’ work ethos.

Prepare to embrace new workplace opportunities

Our 2018 Occupancy Benchmarking Guide highlights the role of data and advanced analytics in shaping workplace strategy for an ever-changing world of work. A full 77% of respondents said a primary goal for their real estate team this year is to improve space data accuracy. As the number-one response, this points to the pressure corporate real estate leaders are under to make even better-informed decisions. Respondents cited other important goals as well: optimizing the portfolio, reducing overall portfolio costs and increasing the use of utilization data for planning.

In the following pages, we explore how advances in utilization tracking, demand forecasting and other areas can help you optimize your portfolio, transition to new mobility strategies, improve space data accuracy and reduce costs.

Our benchmarking data paints a picture of an industry in rapid change, reinforcing what we see every day in our work with leading companies around the globe. Last year alone, our Occupancy Planning practice expanded by 74% as more companies seek trusted partners to help navigate the rising shift toward more flexible work and transition to technology-driven planning.

We’re thankful to our clients for embarking on this journey with us, innovating side-by-side with our teams every day. Whatever the future holds, one thing is certain—it’s coming fast. We’re in this together, ready to push the limits of what technology and humans can accomplish together. Are you ready?

“Are the needs of your business and employees changing faster than your workplace can keep up? If so, you’re not alone. Technological and social changes have been radically transforming workplaces since the dot-com era. But the speed of change is now quickening like we’ve never seen. Organizations of all sizes, across all industries, are accelerating their efforts to deliver future-focused workplace strategies that inspire a more productive, mobile workforce.

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“The pace of change has never been this fast, yet it will never be this slow again.” - Justin Trudeau
How to use this guide

The future of work is already transforming workplaces around the globe. Workplace leaders must engage in masterful corporate real estate strategies to deliver environments that fit their company culture—with no more space than is needed, but also no less.

To help you strike this newly achievable balance, we developed our annual Occupancy Benchmarking Report. We asked forward-looking real estate teams from around the world to answer nearly 100 detailed questions about how they use their space. By sharing the specifics of how other organizations plan and use physical space, we hope you will gain valuable insights to develop your own workplace and occupancy strategies.

Understanding the findings

Key terms are included in glossary sections throughout the report. The following points will also be useful to interpret the findings:

- We received responses from 108 leaders across 69 organizations that do business with JLL. The term “respondents” therefore refers to the number of individual representatives answering a given question, rather than the number of organizations.
- Office space planning tactics can vary widely from technical space planning, so we distinguish between office space and more technical space like laboratories and R&D facilities.
- Some questions asked respondents to “check all that apply.” In these instances, the results may exceed 100%.
- We asked an initial qualifying question at the beginning of each section regarding which regions conduct each activity. The subsequent responses applied only to those regions with an affirmative response.

Response by industry

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications</td>
<td>6%</td>
</tr>
<tr>
<td>Consumer products</td>
<td>11%</td>
</tr>
<tr>
<td>Financial services</td>
<td>17%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>4%</td>
</tr>
<tr>
<td>Industrial</td>
<td>5%</td>
</tr>
<tr>
<td>Insurance</td>
<td>3%</td>
</tr>
<tr>
<td>Life Sciences</td>
<td>8%</td>
</tr>
<tr>
<td>Non-profit</td>
<td>1%</td>
</tr>
<tr>
<td>Professional services</td>
<td>5%</td>
</tr>
<tr>
<td>Public Sector</td>
<td>3%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>1%</td>
</tr>
<tr>
<td>Technology</td>
<td>33%</td>
</tr>
<tr>
<td>Utilities</td>
<td>3%</td>
</tr>
</tbody>
</table>
Benchmarking and metrics

The power of data
Detailed occupancy metrics provide a glimpse into how people use space and how efficiently a portfolio is performing. With the right metrics at their fingertips, corporate real estate organizations can set clear guidelines for how their current space should be used, or establish targets that align with goals for future space. Through standardized calculations, occupancy metrics also allow organizations to benchmark themselves against others in their industry, region or other categories, ultimately revealing opportunities for improvement.

Definitions
• Exterior gross square meters (GSM): The total square meters from the exterior of the building wall (includes wall thickness).
• Interior gross square meters (GSM): The exterior GSM minus the exterior wall thickness.
• Usable square meters (USM): The interior gross measurement without core elements such as vertical penetrations, stairs, elevators, restrooms and utility rooms.
• Capacity: The quantity of office or workstation seats that can be occupied.

• Population/headcount: The number of people assigned to a seat or area.
• Vacancy: A unit of capacity that has not been assigned.
• Vacancy rate: The percentage of seats that are vacant compared to capacity.
• Density: A measure of efficiency calculated by dividing Rentable Square Meters (RSM) by population or capacity to determine the RSM per person or seat.

Occupancy reporting around the world

North America
- Report occupancy metrics: 70%
- Do not report occupancy metrics: 30%

APAC
- Report occupancy metrics: 70%
- Do not report occupancy metrics: 30%

EMEA
- Report occupancy metrics: 61%
- Do not report occupancy metrics: 39%

Latin America/South America
- Report occupancy metrics: 73%
- Do not report occupancy metrics: 27%

69% of clients currently report occupancy benchmarking and metrics.
Vacancy levels by region

Globally, 58% of respondents have average vacancy between 10-29% of their office space capacity. The remaining respondents are split evenly between average vacancy levels that fall below or above those levels. In EMEA and Asia Pacific, 70% of respondents average less than 20% vacancy, compared to only 38% in the Americas.

Office space density per person

The majority of respondents (52%) report density of 12-15 RSM per person or less. Compared to other regions, North America has the most respondents in the 12-15 RSM range, while the other regions average less than 11 RSM per person.

Offices-to-workstations percentages

Year over year, we are seeing a marked shift toward the open office environment: For example, 43% of respondents indicated that enclosed offices now constitute less than 5% of their sites—up from 35% of respondents in 2017. Moreover, 41% of respondents now have office-to-workstation ratios starting at 10% and up, significantly less than the 57% who had those ratios in 2017.

Breaking these numbers out regionally, we see that North America has the highest proportion of offices-to-workstations percentages, with 62% of respondents reporting percentages from 10% and up. Meanwhile, more than 50% of respondents in Latin and South America, EMEA and Asia Pacific keep their offices-to-workstation percentages 9% and below.

Structural vacancy

Half of respondents (51%) do not plan for structural vacancy. Of those who do, however, 78% plan for less than 10% structural vacancy. These findings are consistent across all four regions.
Key takeaways

Tracking occupancy benchmarking and metrics is the first step to a more optimized real estate portfolio. The companies who report occupancy metrics are 47% more likely to track utilization and/or use utilization data. They’re also 43% more likely to allocate and/or charge back space to the different business units. Benchmarking also contributes to financial returns—companies reporting metrics are twice as likely to report cost savings or cost avoidance opportunities.

Additionally, the companies surveyed who have more than 700,000 RSM (rentable square meters) in their portfolio are 38% more likely to report occupancy benchmarking and metrics than those with less than 700,000 RSM. As proof that occupancy data is important to companies across many business areas, occupancy benchmarking and metrics are reported by at least one organization from each of the 13 industries that were surveyed.
Measure well, then fine-tune

Achieving a more productive and efficient workplace begins with understanding how employees currently use their space. Then, corporate real estate teams can pinpoint areas for improvement and take actions to increase utilization.

New advances in technology and workplace strategy have infused this two-part process with great potential—and new nuances and complexities to work through. Embarking on a deep utilization improvement program can be an intimidating undertaking for corporate real estate teams. They must weigh many considerations, such as privacy concerns raised by business units and Human Resources (HR), or pushback from reluctant employees who fear change. On top of that, government regulations are also key considerations, especially in European environments that comply with the General Data Protection Requirements (GDPR). Many companies who overcome these hurdles achieve an unexpected outcome—by implementing increased space utilization models, they find they are not actually changing their employees’ behavior, but formalizing ways they were already interacting with the space.

What are the potential benefits of better utilizing space? Organizations that embark down this path can anticipate the following potential outcomes:

- **Improve occupier experience by better use of existing facilities.**
- **Eliminate the risk of overcrowding or underutilizing the space and negatively affecting the occupier experience.**
- **Provide a return on investment in the workplace by determining a true utilization ratio that justifies the space investment.**
- **Indicate if a change management practice is effective by analyzing the alignment between the space and the team’s behavior.**
- **Reduce excess costs by understanding the unused capacity at the building or floor level.**

66% of our global respondents track utilization.

Diving deeper into utilization tracking

We took a closer look at the 66% of respondents who track utilization to uncover the reasons for their efforts, how they track, how long their studies last and what spaces they monitor.
Utilization tracking by region

Around the globe, organizations track utilization at similar levels. Respondents from EMEA lead the pack, with 72% affirming they track utilization.

<table>
<thead>
<tr>
<th>Region</th>
<th>Tracking Utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>64%</td>
</tr>
<tr>
<td>APAC</td>
<td>65%</td>
</tr>
<tr>
<td>EMEA</td>
<td>72%</td>
</tr>
<tr>
<td>LA/SA</td>
<td>64%</td>
</tr>
</tbody>
</table>

Office/Administrative space utilization rates

<table>
<thead>
<tr>
<th>Utilization Rate</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;30%</td>
<td>3%</td>
</tr>
<tr>
<td>30-39%</td>
<td>7%</td>
</tr>
<tr>
<td>40-49%</td>
<td>8%</td>
</tr>
<tr>
<td>50-59%</td>
<td>20%</td>
</tr>
<tr>
<td>60-69%</td>
<td>29%</td>
</tr>
<tr>
<td>70-79%</td>
<td>21%</td>
</tr>
<tr>
<td>80-89%</td>
<td>8%</td>
</tr>
<tr>
<td>&gt;90%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Reason for tracking utilization

Why do organizations track utilization? Respondents most frequently cited the need to support planning that fuels more informed decision-making. This represents a major shift that has been underway since 2016. Today, corporate real estate teams are typically tracking utilization so that they can be more proactive planners, whereas in the past they were driven more by reactive reporting needs.

<table>
<thead>
<tr>
<th>Utilization Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td>90%</td>
</tr>
<tr>
<td>Vacancy reporting</td>
<td>61%</td>
</tr>
<tr>
<td>Business case</td>
<td>55%</td>
</tr>
<tr>
<td>Mobility programs</td>
<td>55%</td>
</tr>
<tr>
<td>Forecasting</td>
<td>37%</td>
</tr>
<tr>
<td>Cost reporting</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

Utilization tracking methods

Visual observations: Physical walkthrough of the workspace several times a day to track in/out/away and other cultural observations.

Internet connections: Tracking utilization through network activity (both wired and wireless) and presence monitoring such as instant messaging.

Sensors: Use of a device to gather utilization data, including but not limited to heat, desk, seat and motion sensors.

Badging and wearables: Tracking utilization by using information from badge swipe data, applications that are downloaded on a phone, or monitors that track personal interactions.

Methods for utilization tracking

<table>
<thead>
<tr>
<th>Utilization Tracking Method</th>
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</thead>
<tbody>
<tr>
<td>Visual observations</td>
<td>65%</td>
</tr>
<tr>
<td>Badging/wearables</td>
<td>56%</td>
</tr>
<tr>
<td>WIFI connection</td>
<td>20%</td>
</tr>
<tr>
<td>Sensors</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>
Utilization study duration
Just 30% of respondents who track utilization are conducting ongoing studies, where they constantly collect data at a particular site, compared to 42% in our 2017 benchmarking study. Meanwhile, studies lasting two weeks or less are up from 31% in 2017 to 45% in 2018.

What’s driving these changes? Our on-the-ground teams observe that the increased use of costly utilization tracking technology inspires some clients to set a parameter on the study length to keep costs under control. This trade-off tends to pay off, because the quality of data and number of data points is so much higher with a tech-driven approach.

Utilization measurement by size
While 66% of respondents track utilization, portfolios between 280,000 and 700,000 square meters are even more likely to do so, with an average rate of 83%.

Average utilization rate by region
North America 60%
APAC 68%
EMEA 64%
LA/SX 64%

Utilization rates by industry
- Communications 82%
- Consumer products 59%
- Financial services 57%
- Healthcare 60%
- Industrial 78%
- Life Sciences 69%
- Non-Profit 95%
- Professional services 65%
- Restaurants 75%
- Technology 61%
- Utilities 50%

Links between utilization tracking and other occupancy planning strategies
Organizations that track utilization also gather demand forecasting 71% of the time—twice the rate of organizations that don’t track utilization. Similarly, organizations that track utilization are twice as likely to have an allocation program, with 82% of utilization trackers indicating they allocate space by business unit.
Key takeaways
Measuring utilization can be a big step in a company’s journey to better support its employees. Taking action on what your teams then discover can increase employee engagement and productivity, while providing substantial cost savings. These potentially powerful benefits have already motivated many corporate real estate teams to apply utilization measurement tools to their real estate portfolios. Their efforts are allowing them to jump from focusing on simply the opportunities that vacant seats provide, to looking at true vacancy that’s been hidden behind underutilized space.

If your organization decides to measure utilization and act upon the resulting findings, then you’ll want to begin exploring the many possibilities, from navigating reservation systems and change management programs, to identifying the best partner to help navigate the process. We recommend taking a comprehensive approach to measuring and acting upon utilization study findings, one that can pull together measurement technology solutions, occupancy planning, data analysis, and workplace strategy to implement the right mix of solutions for you.

Situation
Following a workplace renovation, an organization wanted to determine how well its new space was being utilized, and which areas were seeing the highest usage. Its real estate team sought to use the findings to adjust the workplace standards for future renovations.

Solution
Our team closely observed 3,326 workspaces throughout the day. We notated areas as “actively in use,” “temporarily unused” or “not in use.” A comprehensive report laid out our analysis of trends we uncovered in the study data.

Results
The study revealed that assigned desks went underutilized half the time, and conference room usage was 50% below the benchmark. These findings supported a corporate mobility program, and enabled the organization to improve its workplace standards and design spaces that would boost utilization.
With our own utilization monitoring, we discovered the average daily desk occupancy peaks at 47%. Clients follow typical patterns, occupying their seats most first thing in the morning (around 9-10 a.m.) and then again in the afternoon before leaving for the day around 5 p.m. And the charts show the camel-hump effect of higher occupancy Tuesday through Thursday, and lower on Monday and Friday.

The sensors also have a significant advantage over visual observation methods, allowing us to see “time away” in incremental time periods (i.e. 15 minutes, 30 minutes, 1 hour). Understanding the true “time away” from the desk is crucial, as you cannot re-allocate space based on short breaks away from a desk for coffee or bio breaks.

Conference room utilization data turned up interesting findings as well. For example, most of our large conference rooms are underutilized, with only 3-4 people typically sitting in a room that seats 13+ people.

Since Utilization IQ integrates data from multiple sources, the dashboards also capture badge swipe data. We’re able to see the behavior of each employee based on how frequently they attend the building. That allows us to ensure we have space to accommodate “resident” employees that come to the office on a full-time basis.

With these and other insights, we’re able to make changes that ensure every employee has the space they need to do their jobs effectively—without wasting money on space that is barely used.

What's your Utilization Intelligence?

What utilization strategy is right for you?

Identifying the right utilization strategy for your organization could be a significant differentiator for your business. But when you’re faced with a confusing landscape of technology choices, it can be challenging to find out exactly what you need to know about your space utilization, and what solutions will be right for your unique needs.

For most organizations, measuring utilization is the Holy Grail of corporate real estate. But before jumping to solutions, we encourage you to follow these four steps to define your utilization strategy:

1. Consider why you need to gather utilization data, how data can be gathered, and what you can afford.
2. Identify the level of workplace utilization monitoring that makes best sense for your team.
3. Match the scope of solutions to your needs.
4. Assess the level of sophistication of the tool you will need.

Once you’ve selected and implemented the monitoring tools that will help accomplish your goals, it’s time to analyze your data in an intelligent way. Platforms such as JLL’s Utilization IQ can take data inputs from multiple building systems, sensors, network systems and other sources to generate meaningful intelligence—ultimately helping you optimize real estate occupancy and improve the employee experience.

At our own headquarters in Chicago, we recently used seat and desk sensors to get a better understanding of how our teams are utilizing the workspace on three floors. The data funneled right into Utilization IQ, churning out dashboards that provided insights that will inform our future plans.

What utilization strategy is right for you?
The power of choice at work

The workplace is continuously evolving, pushing companies to provide a more agile environment to match their employees’ work habits and foster an innovative culture. Technology enables employees to work more freely both within the office and remotely, and continues to promote a highly mobile workforce. A comprehensive mobility strategy can empower employees to work where they will be most efficient, while helping reduce underutilized space, accommodate growth and decrease overall real estate costs.

Typically, organizations choose to invest in mobility programs for three main reasons. They will:

- Create a more flexible work culture while providing more collaborative, innovative spaces.
- Decrease the real estate footprint and reduce operating and real estate expenses—which are usually the second largest expense for most companies.
- Optimize existing real estate and utilize space more efficiently.

Definitions

- **Mobility program**: A program in which a specific subset of the population is identified as not requiring designated work space. A portion of the building or site’s work spaces are then designated as “Mobile/Free Address” and that population can use those spaces on a first-come, first-served basis in the course of a day.
- **Mobile employees**: A mobility program will define which employees are eligible. Typically employees who do not utilize a workspace for more than three days a week or who work from home are designated as “Mobile” employees.
- **Mobility target**: The metric used to benchmark the performance of a mobility program, typically shown as a ratio of seats to population. This is often calculated as the number of employees in a space or the total square meters dedicated to the mobility program. For example, the mobility target might be 2:1 (where there are 2 people for every 1 workspace) or 7 sq. m. per person.
- **Hotelier**: A program in which individual workspaces are used by guests or employees visiting from another location; not typically part of a mobility program.
- **Free Address**: Unassigned employee seating; seats are collectively assigned to teams or departments but are on a first-come, first-served basis. Some organizations use other terminology, such as “mobile.”
- **Neighborhood**: A defined area of workspaces designated to departments, groups, job task or team. Neighborhoods can also include designated amenities and support spaces such as huddle/phone rooms, conference/meeting areas and quiet/focus zones.
- **Open collaboration**: A meeting space not enclosed within walls or partitions where employees meet within the open office environment. Open collaboration spaces have various furniture configurations including, but not limited to, soft seating (couches and chairs), conference tables and high-top tables.
- **Furniture standard**: Approved specifications of work space, such as dimensions, furniture manufacturer, finishes, configuration and design. Furniture standards can be designed specifically by organizations, groups or work styles. For example, a furniture standard can be determined for all mobility (free address) workspaces within a company across its portfolio.
Observations

Mobility is on the rise. In 2017, 41% of organizations surveyed said they had a mobility program. This year, that number shot up to 52%. In addition, companies that have a mobility program are 34% more likely to gather demand forecast data than those without one.

Industries with high rates of mobility

Some industries are more likely than others to have a mobility program in at least one region.

- **Life Sciences**: 83%
- **Consumer products**: 86%
- **Financial services**: 69%
- **Professional services**: 75%
- **Technology**: 81%

Employee population enrolled in mobility programs

Organizations in APAC with mobility programs are the most likely to have more than 20% or more of their employees participating, with 64% reporting that a fifth of their employees are enrolled in the mobility program, compared to approximately 20% of respondents in the Americas and 33% in EMEA.

Employee participation in mobility programs

On average, 30% of respondents globally have more than 20% of their employee population participating in a mobility program.

Mobility program target basis

Across the globe, it is significantly more likely that organizations base their mobility target on the number of employees enrolled in a mobility program than on any other metric.
**Mobility program eligibility criteria**

Job function and utilization are the primary factors determining which employees are eligible for mobility programs.

### IWMS/CAFM tracking of mobility workers

Of organizations with mobility programs, 80% track mobility employees via Integrated Workplace Management Systems (IWMS) or Computer-Aided Facilities Management (CAFM) systems.

- Assigned to mobile worker storage (locker, etc.)
- Assigned to mock polyline space
- Assigned to neighborhood/zone
- Assigned to seat
- Not assigned

### Mobility space furniture standards

More than half of respondents with a mobility program (61%) have mobility space furniture standards, an increase over last year’s 55%.

### Mobility programs by region

Mobility is equally prevalent across all regions globally, with 50% of respondents in EMEA, 48% in APAC and 55% in North America.
Storage options

In lieu of an assigned workspace where an employee can store their belongings, 83% of mobility programs offer an alternate storage solution in the form of a locker, or portable or stationary file space.

Of respondents with mobility programs, more than half (53%) utilize lockers over stationary lateral files or movable pedestal files. Only 11% do not supply storage amenities for mobility workers. Some mobility programs also offer day lockers for personal storage or dedicated team closets or file areas for shared items.

Key takeaways

The reasons for the rise of mobility programs are varied and ever changing. Organizations embarking on this path point to benefits such as cost avoidances and savings, densification, square footage reduction, enhanced collaborative/innovative workspaces and optimized space allocations. As the benefits of offering employees more choice become clearer, mobility programs are likely to continue evolving as more companies adopt this new way of working.

Situation

The organization needed to attract and retain top talent while modernizing their space and workplace strategy— all while reducing costs. We identified an opportunity to consolidate three sites and refresh their office space, in addition to incorporating a mobile workplace environment and right-sizing for future population demand.

Solution

We provided scenario planning for metro consolidation options by analyzing current and future headcount, site utilization and mobility opportunities. We also analyzed site utilization to identify swing space during a multi-phased construction process. And while we were at it, we updated the clients IWMS/CAFM system to track mobile occupancy by neighborhood.

Results

When consolidating from 3 sites to 1 site, we reduced square meter by 697, or nearly 20%. We implemented a mobility program that had capacity for 60% assigned seating and 40% mobile seating. This included a planned mobile desk sharing ratio of 1.3 people to every 1 desk.

Work-at-home components

Just over a third (36%) of mobility programs have a work-at-home (WAH) component, compared with 45% reported in 2017. Possible reasons for the decline for this may include more businesses leaning towards mobility programs rather than WAH programs. As they evolve their programs to include furniture standards specific to mobility, they are creating more collaborative and efficient space within their own footprints, while supporting employee choice.
Space eligibility and function

Setting standards
An optimal work environment offers its inhabitants easy access to the right workspace, at the right time. To achieve this vision, forward-looking organizations are applying space eligibility and function guidelines to offices, workstations, conference rooms and mobile work environments, in order to ensure that the right staff can and do utilize spaces most conducive to their work.

As organizations strive to do more with less, codifying these standards can support portfolio optimization while fostering workplace productivity.

Definitions
- **Space Eligibility**: Criteria used by companies to establish and implement efficient and equitable space use standards. This allows specific workspaces to be assigned and allocated to the appropriate staff.
- **Space Functions**: The general use for the space and the parent category for the space type. They typically include values such as workspace, amenity, conference, food service, etc.
- **Space Type**: Detailed categories under space functions that typically include values such as bench seat, standard workstations, video conference, team room and pantry.

Observations
**Space eligibility criteria**
Globally, 80% of respondents have defined space eligibility criteria, with North America leading the pack.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>86%</td>
</tr>
<tr>
<td>APAC</td>
<td>78%</td>
</tr>
<tr>
<td>EMEA</td>
<td>61%</td>
</tr>
<tr>
<td>LA/SA</td>
<td>82%</td>
</tr>
</tbody>
</table>
Space eligibility basis
Organizations can use a variety of organizational systems to determine office eligibility, but job function is the most common—37% of respondents who define space eligibility criteria use it to determine who qualifies for an office. Meanwhile, nearly one-quarter (23%) use band level, an organizational system that establishes salary compensation for certain roles.

Designated space standards
95% of respondents have defined space standards and functions.

Standard workstation sizes
Of respondents who define space standards criteria, 53% have standard workstations sized between 4-4.9 square meters, while 46% have workstations less than 3.2-3.9 square meters.

Standard office sizes

Visitor workspace
The overwhelming majority (83%) of respondents designate at least some form of visitor drop-in workspace.

Typical office locations
The days of the corner office are gone for most respondents—71% of respondents with offices in their portfolio say standards call for office locations in the interior of the space, with only 29% designated along the exterior.
Conclusions and impact

Organizations around the world are continuing to shift away from floor plans designed around large offices and towards open-plan concepts with smaller offices and more workstations or benching. By establishing clear space eligibility and function guidelines, workplace leaders in these companies are setting new rules to deliver and maintain more choice-based work environments.

As the future of work leans more towards collaborative mobile environments, these types of guidelines will also help organizations ensure the spaces are indeed used for their intended purposes. And, with all this valuable space use data, we are equipped to change the work setting/environment based on how people are actually using the space.
Demand forecasting and planning

Data-driven insights drive planning

Would you define your current real estate planning model as reactive (reacting to the past rather than anticipating the future), or proactive (anticipating what the future will be, and acting accordingly ahead of time)? In today’s fast-paced and changing environment, most real estate teams are working to be proactive—and demand forecasting and planning tools can help them do so.

Demand forecasting tools are arming leaders with critical data and insights to inform capital investment and expansion decisions. Demand planning then aligns real estate needs with projected organizational growth. Wielded effectively, these tools can directly support long-term budgeting goals.

For instance, of the companies we surveyed, those who gather demand data were 65% more likely to report their cost saves and avoidances, demonstrating the strategic advantage they see in adopting this process.

Definitions

- **Supply:** The total number of seats or the number of people who can be accommodated within a footprint.
- **Demand:** Headcount, or the number of seats required to support that headcount.
- **Demand Forecasting:** A process of collecting projected future headcount over a defined period of time on a regular cadence or ad hoc.
- **Demand Planning:** A process that utilizes forecasts, trends and analysis to accommodate anticipated need of the business while aligning with supply in the portfolio overlaying the demand over the supply to understand where you may be short or have too much space.

57% of respondents collect demand forecasting data.

Observations

The first step toward proactive space management is to gather and analyze demand forecast data at the business unit level. Typical reporting includes the current state of seat occupancy and vacancy, as well as business unit growth projections. Real estate teams may choose to refresh forecasts on a regular basis, or request updates on an as-needed basis for specific initiatives. Regardless of frequency, planners should gather forecasts for a set amount of time into the future. Then, by archiving these forecasts in a data warehouse, teams can integrate them into dashboards to track trends and with predictive analytics, can conduct future modeling.

This proactive approach tends to have a positive ripple effect across other occupancy planning tactics, too. Compared with respondents who do not collect demand forecasting data, those who do so are also 60% more likely to track utilization, 33% more likely to have a mobility program and 65% more likely to report cost savings and avoidances.
Forecasting for non-employees
85% of respondents who gather demand forecasting data include projections for non-employees such as contractors, temps and interns.

Diverse buy-in
Gathering demand data is happening universally across industry lines and portfolio sizes. Of the 57% of respondents who gather demand forecasting data, almost all industries were represented and at similar proportions to the overall responses by industry. Likewise, the size of the portfolio does not seem to be a factor in determining who gathers demand data—companies with small, medium and large portfolios are also equally represented within those that gather demand data.

Demand planning observations
Strategic use of forecast data is essential for making proactive real estate decisions. But effective demand planning requires more than that: It also requires buy-in and coordination between a company’s leadership, HR, finance and real estate teams. That’s because effective demand planning aligns revenue forecasts with real estate inventory, with the goal of minimizing the gap between space supply and demand to directly support business success.

Working across business units in this way, executives can factor in long-term organizational needs, goals and planned projects to create fact-based strategies for future real estate needs. Scenarios based on specific questions—such as whether to renew a lease as-is, reduce or expand space in the same building, or move—can ensure the most informed decisions possible.

Key takeaways
When the real estate team operates as a strategic partner rather than a reactive responder, an organization can achieve an optimized portfolio that proactively responds to changing business needs and priorities.
Cost savings and avoidances

Balancing price, prioritizing reward

Like everything else in corporate real estate strategy, occupancy planning depends on shrewd balancing of cost versus return. Too much space is a waste of capital, while too little can hurt business productivity and growth.

Organizations that have proactive occupancy planning programs in place are able to make the kinds of complex decisions that can lead to cost savings and avoidances, while fueling return on investment.

Definitions

- **Cost Savings (CS)** reduce or eliminate money currently incurred as a real estate expense. Examples include site disposal at lease expiration, early termination of a lease, consolidation of sites, contraction of sites and subleasing a site.

- **Cost Avoidances (CA)** are costs that do not need to be incurred as a new or unplanned expense. Examples include not having to establish a new site, not having to expand a site and sending staff to work at home status.

Observations

Globally, 16 of our clients currently engage in proactive strategic planning that is measured in cost savings and cost avoidances. Together, these clients have recorded 57 CS/CA projects, fueling significant savings of $48.6 million in the last year.

The most common CS/CA opportunities include reducing seat vacancy, trimming square footage, increasing space efficiency and tightening seat density.

Situation

An organization faced an upcoming lease expiration for a 25,949-square-meter site. Analysis revealed that seat vacancy was high at 46%—a full 204 seats were going unused. However, relocation options were also challenging, with hefty expenses and complications due to the current site’s infrastructure, which included a data center. In addition, 53% of the site was subleased.

Solution

The occupancy planning team created move-versus-stay scenarios to help evaluate the options. By proactively negotiating renewal terms, the organization discovered new ways to substantially reduce overall square footage and costs—while staying in the location it preferred.

Results

The tenants and landlord agreed to new terms that allowed the organization to trim its footprint by just over 9,290 square meters (a 63% reduction), reduce seat vacancy by 114 seats, and cut annual real estate costs from $463.9 to $411.1 per square foot.

Industry: Technology
Geography: Global
Size: 320,000 square meters

Key takeaways

- A proactive CS/CA tracking program provides a focused link between solid scenario planning and real-world savings results. CS/CA programs succeed by prompting real estate teams to identify and detail savings opportunities in a streamlined tracking system. This methodical approach empowers them to pursue both individual and collective opportunities to save and accelerate decisions that are moving more slowly than necessary, without losing tabs on possibilities that may actually need more time.

CS/CA density increases

Thanks to CS/CA efforts, average client density has steadily increased over the past 3 years.

More savings come with bigger portfolios and global reach

The 56% of organizations surveyed who have more than 300 RSM managed by JLL’s Occupancy Planning team are almost 2.5 times more likely to report CS/CA than the 44% with less than 300 RSM managed by JLL. Additionally, organizations who engage JLL for occupancy planning services in more than one world region are more than two times as likely to report CS/CA than those who receive services in only one world region.

<table>
<thead>
<tr>
<th>RSM/seat Before</th>
<th>RSM/seat After</th>
</tr>
</thead>
<tbody>
<tr>
<td>285</td>
<td>157</td>
</tr>
<tr>
<td>212</td>
<td>166</td>
</tr>
</tbody>
</table>

Industry: Technology
Geography: Global
Size: 320,000 square meters

<table>
<thead>
<tr>
<th>RSM/seat</th>
<th>% Reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>45%</td>
<td>22%</td>
</tr>
<tr>
<td>40%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Cost savings: **$48,521,547**
Costs avoided: **$775,607**

Industry: Technology
Geography: Global
Size: 320,000 square meters

<table>
<thead>
<tr>
<th>Year</th>
<th>RSM/seat Before</th>
<th>RSM/seat After</th>
<th>% Reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>285</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>193</td>
<td>166</td>
<td>22%</td>
</tr>
<tr>
<td>2017</td>
<td>212</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* over the past 3 years
* in the most recent year
Space data accuracy

Precision sharpens insights
Good data is fundamental to any planning exercise, particularly when it comes to deciding how much space you will need—and how exactly to deploy it. Meticulous drawings and precise building data directly power real estate costs and chargeback allocations, and are essential to launching utilization observation and demand planning programs.

With robust metrics and a continual focus on precision, organizations can better understand current inventory and statistics—and in turn, make more insightful, fact-based decisions.

Today, ever-evolving technology tools are available to optimize space data accuracy, from IWMS/CAFM systems and tablets to various kinds of specialized software.

Definitions
Space data accuracy measures how precisely drawings and data represent the built and occupied environment. These measures apply to both graphical representations via floor plans as well as space function, space type, occupancy, cost centers and usage.

Observations
88% of respondents use JLL to maintain their space data. The other 12% of respondents maintain space data themselves. While specific data points will depend on an organization’s unique business priorities, data collection generally falls into four categories.

Data maintained

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drawing</td>
<td>94%</td>
</tr>
<tr>
<td>Space attributes</td>
<td>96%</td>
</tr>
<tr>
<td>Business Unit cost center/ allocation</td>
<td>75%</td>
</tr>
<tr>
<td>Occupant name</td>
<td>91%</td>
</tr>
</tbody>
</table>

Compared with last year, the survey signals an increase in the amount of companies across all regions and industries that now track data in all four of these categories. Today, accuracy-oriented organizations typically maintain all four of these categories, as well as space attributes such as capacity, space function, space type and other elements that are most relevant to their business objectives.

Responsibility for data maintenance and audits
JLL manages 85% of all moves, adds and relocation data updates for our clients and handles 77% of all space data accuracy audits. We are responsible for both relocation data updates and audits for 69% of the respondents, while 5% of respondents handle both of these tasks in-house.

Data accuracy audits
Organizations typically use one of two methods to perform data accuracy audits. The most common (94%) is using paper or electronic (PDF) floor plans by an auditor, and returning the findings to the planning team to update the IWMS/CAFM system. A scant 6% submit the corrections electronically with a tablet or other device. However, 39% of the respondents currently using this former approach are now exploring more technology-driven options like this.

Space data audit frequency
A full 97% of clients rely on space data audits for data verification. Quarterly frequency is most common across all regions.

Space data accuracy
Nearly half (46%) of respondents have a client-facing space data accuracy key performance indicator (KPI) in place, and 70% of those have fees at risk if space data accuracy measures are not in line with the targets.

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Conclusions and impact

The Fourth Industrial Revolution is having a profound impact on occupancy planning, bringing with it more invaluable data points than ever. Quick access to highly accurate, relevant data is becoming a must-have for real estate leaders around the world. We can only expect more improvements in the ways we collect data, as emerging technologies become more commonplace.

Situation

This data-driven organization needed to combine two corporate real estate portfolios and merge two Integrated Workplace Management Systems (IWMS) systems into one global IWMS system.

Solution

Once the organization had selected Archibus as the IWMS tool for the migrated/combined portfolios, our team worked collaboratively to centralize all global space planning requests through a custom Archibus module. We leveraged the system’s Self Service Location update module, enabling 200,000 users to self-update their location information. A refined reporting system provided better access to accurate data for downstream groups and leadership.

Results

Following the implementation, the organization is now targeting data accuracy rates higher than 90%. The organization strives for ongoing consistency in data maintenance, global standardization of all occupancy planning processes, and implementation of a global workplace strategy.

Industry: Financial Services
Geography: Global
Size: 7.43 million square meters

Situation

Space data managers routinely tour administrative offices and call centers to maintain the accuracy of floor plans and occupancy data.

Solution

To ensure they had on-demand access to the data they needed, we equipped space data managers with compliant tablet computers, and established site-specific WiFi and/or mobile hotspots for easy connectivity. We also updated operating procedures and business controls for smooth workflow.

Results

By enabling live IWMS updates, the organization was able to improve agility, and gain greater confidence in their data confidence. As an added bonus, the all-digital approach was more environmentally friendly.
Space allocations and chargebacks

Identifying the who, what, where

A space allocation and chargeback program allows real estate teams to pinpoint precise spatial usage—and costs—by business unit. Some organizations use this understanding as an opportunity to create accountability and transparency around organizational trends and costs, which can in turn spur improved cost strategies. Others also use it to bill internally according to the amount of space used.

Observations

Space allocations

Around the world, 65% of respondents allocate space to different business units—with minimal variance across the regions. The top three benefits they find from allocating space are understanding ownership of space in portfolio, understanding vacancy rate, and charging back space to the business unit.

Chargebacks

On average, respondents across all regions charge back to business units 49% of the time, with North America the highest at 54% and EMEA the lowest at 39%.

Definitions

- **Space allocations**: The amount of real estate assigned to each business unit. It may also become the basis for a space chargeback program.
- **Space chargeback**: A program to identify, communicate and obtain reimbursement for real estate costs from various business units. The goal of a space chargeback is to drive accountability for space use and align with an organization’s business goals.
- **Common space**: Space not assigned to a business unit; typically includes circulation, lobby, reception, restroom, break room, cafeteria, fitness spaces.

Chargeback methodology

46% of respondents charge back for space based on the area assigned to each business unit.

Chargeback update frequency

47% of respondents charge back their business units on an annual basis.

Meeting/open collaboration space allocations

50% of respondents share meeting or collaborative space by prorating it to all business groups. The Americas region has the highest percentage of clients (53%) who take this approach.
Common space allocations
60% of clients share the common space by prorating to all business groups. The Americas region has the highest percentage of clients (64%) who allocate common space to all business groups.

Vacant space allocations
27% of clients allocate vacant space by prorating to all business groups, 41% allocate it to a business group, and 19% allocate it to real estate. Latin America/South America has the highest percentage of clients (42%) who allocate vacant space to all business groups.
Allocation update frequencies

Thirty-nine percent of clients update their allocations as needed, and 26% update on an annual basis.

Conclusions and impact

Most organizations engaging in space allocation and chargebacks agree on the prize benefit: such programs enable them to densify space by increasing mobility.

Allocations and chargeback programs can exist independent of one another, since each program supports a variety of objectives. Consider, for instance, that 65% of respondents allocate space while 49% actively charge back for space. However, due to the variety of methods they use, only 44% of those allocations directly support a chargeback program.
Powerful new tools, perpetual innovation

Technology is an integral part of our world today, especially in the world of work. From data-informed design to tracking entire portfolios, new technology breakthroughs have a profound impact on how businesses plan, design and use real estate. Knowing how to leverage these advances in the workplace can fuel insights into utilization, occupancy and trends, and reveal valuable cost analysis.

Definitions

• **CAFM/IWMS:** Computer aided facilities management (CAFM) and Integrated Workplace Management System (IWMS) are forms of software that can assist in tracking and planning spaces, facilities operations, asset management, room reservations and other customer or vendor service requests.

• **CAFM/IWMS Implementation:** After identifying the right tech tools to support workplace goals and objectives, real estate teams can then integrate these new systems into their workplaces.

• **Data points:** Single pieces of information that a CAFM/IWMS solution can collect, organize and measure.

• **Data accuracy:** Measures how precisely drawings and data represent the built and occupied environment. These measures apply to both graphical representations via floor plans as well as space function, space type, occupancy, cost centers and usage.

• **Data integration:** A comprehensive process that enhances the CAFM/IWMS solution by combining or merging data from one or more sources for the purpose of providing more meaningful and useful information.

<table>
<thead>
<tr>
<th>Portfolio tracked in CAFM/IWMS technology (RSM)</th>
<th>Tracked RSM</th>
<th>Non Tracked RSM</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>21,720,752</td>
<td>5,481,285</td>
</tr>
<tr>
<td>APAC</td>
<td>1,839,482</td>
<td>232,258</td>
</tr>
<tr>
<td>EMEA</td>
<td>1,217,031</td>
<td>315,871</td>
</tr>
<tr>
<td>LA/SA</td>
<td>631,741</td>
<td>603,870</td>
</tr>
<tr>
<td>Global</td>
<td>25,409,006</td>
<td>6,661,154</td>
</tr>
</tbody>
</table>

- 89% North America
- 89% APAC
- 77% EMEA
- 53% LA/SA
- 77% Global
CAFM/IWMS technology usage

96% 96% 94% 100%
North America APAC EMEA LA/SA

Data feeds from corporate systems into CAFM/IWMS technology

91%
North America APAC EMEA LA/SA

91% of clients feed corporate data into their CAFM/IWMS systems.

Data feeds from CAFM/IWMS into corporate systems

43%
Global North America APAC EMEA LA/SA

43% of clients have information such as seat location fed from their CAFM/IWMS back to their corporate system.

Technology deployed

The following CAFM/IWMS systems are used to manage our clients’ portfolios:

139
ARCHIBUS
41
SPACE/FM Systems
37
IBM TRIRIGA
18
iOffice
15
Manhattan/Centerline

Key takeaways

Ultimately, technology and data collection drives informed workplace decision-making that supports broader organizational objectives, from fueling productivity to curbing vacancy.

By leveraging CAFM/IWMS solutions, organizations can improve long-term planning of space, facilities, maintenance, services and budgets to ensure each element of the workplace plan is in full alignment with core business needs. They can also help streamline facilities operations and processes within an organization, including move management, asset management, lease planning, reporting, facilities requests and more.

Opportunities to use space more efficiently and ensure future plans are enriched with historic realities.
Case study

Industry: Government
Geography: Asia Pacific
Size: 127,000 square meters

Situation
An organization planned to implement a CAFM tool for meaningful, real-time data, proactive planning and minimized data loss. It also aimed to improve confidence in allocation reporting with consistent processes, with ultimate goals of achieving cost savings across its portfolio.

Solution
The real estate team implemented a system across 19 sites and 9,000 data points. Working collaboratively, the team procured portfolio drawings, validated accuracy and standardized space types and categories. Aligning with organizational priorities and strategies, we created a work plan for data cleanup. We also reported monthly space usage and costs, illustrating the impact of departmental vacancy.

Results
The project achieved $3.9 million in annual cost savings by reducing square footage terms in the lease. The organization benefited from having one true source of portfolio data, which provided transparency into portfolio vacancies and unified processes to increase efficiency.
Global Benchmarking

Understanding regional differences
Even at the best of times, managing a global portfolio can be challenging. Many occupiers today are now finding it easier to develop a more strategic view, thanks to data and benchmarks. Our Global Benchmarking Services database provides insight into regional differences in cost profiles, space use and environmental performance of over 100 million square meters of space and more than 25,000 buildings. The data has been validated and aligned to our GEMCode standard to normalize and ensure data accuracy.

Definitions
- **Occupation costs**: Includes rent and taxes.
- **Operation costs**: Includes service charges, utilities, repairs and maintenance, janitorial, and security.

Observations

### Real estate costs per person

Of the 25,000 buildings in our Global Benchmarking Services database, the average cost of real estate per person is $6,680, with 69% representing rent and real estate taxes. Across the global regions, average operation costs vary between 25% and 34% of total cost per person.

The Americas region benefits from the lowest total costs per person—no surprise since properties there also outperform the other regions on total cost per square foot. The total costs of accommodating employees in EMEA is the highest compared to other global regions—coming in at $6,897 per person, as a result of organizations allocating more space to employees.

*Real estate costs per person* in this report is calculated by annual.

<table>
<thead>
<tr>
<th>Region</th>
<th>Occupation costs</th>
<th>Operation costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>APAC</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>Americas</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>EMEA</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Global</td>
<td>69%</td>
<td>31%</td>
</tr>
</tbody>
</table>

*Occupation costs | Operation costs
Operations costs

Globally, organizations spend an average of $463 per square meter on operations costs, with rent making up 65% of that total. Buildings in the Americas region boast the lowest cost per square foot, with rent making up just 57% of total costs.

Comparatively, APAC has the highest cost per square foot, with rent representing 71% of total costs.

<table>
<thead>
<tr>
<th>Region</th>
<th>Rent (%)</th>
<th>Taxes (%)</th>
<th>Service Charges (%)</th>
<th>Utilities (%)</th>
<th>R&amp;M (%)</th>
<th>Janitorial (%)</th>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>APAC</td>
<td>71</td>
<td>3</td>
<td>9</td>
<td>7</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Americas</td>
<td>57</td>
<td>3</td>
<td>6</td>
<td>8</td>
<td>7</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>EMEA</td>
<td>62</td>
<td>5</td>
<td>5</td>
<td>8</td>
<td>8</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>Global</td>
<td>65</td>
<td>5</td>
<td>6</td>
<td>8</td>
<td>8</td>
<td>4/6</td>
<td></td>
</tr>
</tbody>
</table>

Energy consumption per person

On average, buildings in our database consume 3,113 kWh of electricity per person. Buildings in the APAC region have the lowest energy consumption per person, while buildings in the Americas consume 27% more energy per person than the global average.

<table>
<thead>
<tr>
<th>Region</th>
<th>Electricity Consumption (kWh)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>3113 kWh</td>
</tr>
<tr>
<td>EMEA</td>
<td>3042 kWh</td>
</tr>
<tr>
<td>Americas</td>
<td>3948 kWh</td>
</tr>
<tr>
<td>APAC</td>
<td>2821 kWh</td>
</tr>
</tbody>
</table>

Water consumption per person

Global water consumption averages 12 cubic feet per person. The Americas region has the highest consumption at 19 cubic per person, while APAC water consumption is 33% below the global average.

<table>
<thead>
<tr>
<th>Region</th>
<th>Water Consumption (cubic feet)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>11.59 m³</td>
</tr>
<tr>
<td>EMEA</td>
<td>11.78 m³</td>
</tr>
<tr>
<td>Americas</td>
<td>18.55 m³</td>
</tr>
<tr>
<td>APAC</td>
<td>7.77 m³</td>
</tr>
</tbody>
</table>
Human experience

For most Fortune 500 companies, delivering a unique human experience sits at the center of the workplace agenda. In 2017, JLL developed a comprehensive human experience model based on extensive research, centering around the concepts of engagement, empowerment and fulfillment. Our Global Benchmarking Services team leveraged that model to create a survey that allows companies to measure human experience in the workplace.

Utilized as a diagnostic tool, the survey captures employee experience across 52 dimensions at a building level. The results can inform workplace projects, change management, service improvement and capital projects. The survey focuses on the difference between importance and satisfaction. The section for each dimension asks two standard questions that can be answered on a scale from 1 to 6:

- How important is this factor for me to do my job productively?
- How satisfied I am with the provision of this factor?

Each building receives a score—making it easy to compare buildings with each other or against a regional average. The global average is 89.

The surveys show the 10 most important human experience factors for employees include big strategic issues such as leadership, financial wellness, recognition and rewards, but also individual comfort factors like quality of air, noise and temperature. Globally, these most important factors are also the ones that are underprovided.

Conversely, organizations participating in the survey are excelling at delivering many factors that employees perceive as least important, such as storage, repetitive work and post/mail. This suggests an opportunity to rebalance resources.
The rising tide of occupancy planning

Real estate teams today have access to more data than ever before. Many clients are wielding it to improve the way they design and build workspaces to attract the best talent, inspire employees to do their best work and improve asset productivity. They understand that effective data and analytics allows them to measure value and generate key insights.

There is no doubt that we’re seeing transformational trends in the industry right now that impacts the ability for real estate teams to measure performance. Looking ahead, new advances in technology will provide data and insights to ensure we build the right type of space, improve the employee experience, and become predictive in our real estate planning roles.

Automated wayfinding solutions are already saving employees time, and we see a future in which AI will enable employees to set workspace preferences improving productivity and reducing costs. Many organizations are well on their way to harnessing the potential of data to shape workplace strategy, but we still have farther to go. With better informed insights, real estate becomes an enabler to overall business results, to spend appropriately and for all generations in the workplace to be inspired through the fast-changing future of work.

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