

Research

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Global Occupancy Planning Benchmarking Report 2024

How is real estate transforming in a hybrid world?

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Foreword

In today's ever-evolving corporate landscape, effective occupancy planning has become a cornerstone of success for organizations worldwide. As businesses strive to optimize their real estate assets, enhance employee productivity and adapt to changing work environments, the need for accurate benchmarking and best practices in occupancy planning and space utilization has never been greater.

This benchmarking report dives into the intricacies of space utilization across various industries and regions. By examining key metrics, trends and strategies employed by leading organizations, we aim to provide valuable insights and actionable recommendations for professionals involved in facility management, corporate real estate and workplace strategy.

I invite you to explore the findings, engage in meaningful discussions and leverage the insights gained to drive positive change within your organization. Together, let's pave the way for a more efficient, agile and sustainable approach to occupancy planning.

Melissa Michalik

Global Operations Leader

Occupancy Planning & Management, JLL



About

Our report highlights key trends in occupancy planning and real estate strategy and design. It provides insights into how occupancy planning and management are adapting to support these changes.

This research includes detail on how different regions and industry groups are managing their real estate portfolios and are responding to these shifts. The regions and industries included are listed in the methodology, page 34. However, unless stated, all figures and graphs reported are global results.

For more information on specific regional or industry benchmarks, please get in touch using our contact list on page 37.

This report is...

A tool to help you understand occupancy planning and global benchmarking, enabling you to make informed decisions about your real estate portfolios.

This report is not...

An occupancy calculator. Occupancy metrics and calculations vary greatly based on organizational requirements, policies and specific work activities.

Methodology in brief...

This report is based on a survey of over 80 global organizations who manage extensive office portfolios across different countries and regions, asking over 100 detailed questions. This report contains responses from a selection of the questions asked.



Key takeaways

1

Hybrid programs continue to drive change in workplace planning and management.

Successful real estate strategies need to balance supporting hybrid workstyles, increasing space requirements and technology integration within cost and space constraints, creating challenges for CRE leaders. Consider including facilities management, IT, workspace designers and change management to support your organizational journey.

2

Utilization data is unlocking value for hybrid programs and is now the highest-ranking metric in our global survey.

Workplaces are becoming more dynamic and organizations should focus on benchmarking metrics and data collection methods that can address the challenge of measuring more diverse work activities and fluctuating occupancy patterns.

3

Insights are being driven by technology and visualization platforms.

Forward-thinking companies should consider how technology and advanced analytics can accelerate efficiencies for occupancy planning, workspace design and the dynamic management of workplaces.

4

The spectrum of space types is expanding across collaboration, individual and focus spaces.

Workplace programs are shifting to accommodate flexibility and greater variety of work activities. Organizations need to design for change and adapt as hybrid work styles continue to evolve.

5

Individual seating is critical for successful workplaces but is evolving toward agility.

Increases in seat sharing, changes to seat use and lower utilization rates are sparking a need for change. Collaboration space remains important, but organizations should ensure demand for individual and focused workspaces can be met, to ensure employee performance and satisfaction.

What's driving change in real estate?

Global businesses and employers are facing an increasingly challenging environment, as they continue to grapple with significant changes brought about by the shift to hybrid working. Corporate and commercial real estate (CRE) faces continued pressures to deliver hybrid programs within wider economic, technological and social change.

This year's occupancy planning benchmarking survey shows that over 80% of organizations now have a hybrid program, and almost 50% intend to expand their policy in the next three years. While hybrid programs provide opportunities for employers and employees in terms of flexibility, space variety and optimization, they also bring about challenges. Managing fluctuating weekly occupancy patterns, increasing technology requirements and diminished employee experience in a dynamic workplace creates more complex demands on real estate.

Hybrid working is now the most common work style globally, as 87% of organizations report having a hybrid program and 49% are planning to expand this in the next three years.

Globally, office attendance has been increasing, with average work from office days now at 3.1 days per week.¹ Encouraging employees back to the office while also addressing operational cost reduction and optimizing portfolios goals is creating difficulties for many CRE strategies.

Addressing these complex and often conflicting requirements, within increasing financial and real estate pressures, is the critical challenge facing CRE leaders in 2024 and 2025.



Competing demands to balance portfolio optimization, hybrid programs and employee experience.



Fluctuations in hybrid working patterns, creating increasing complexity for workplace management.

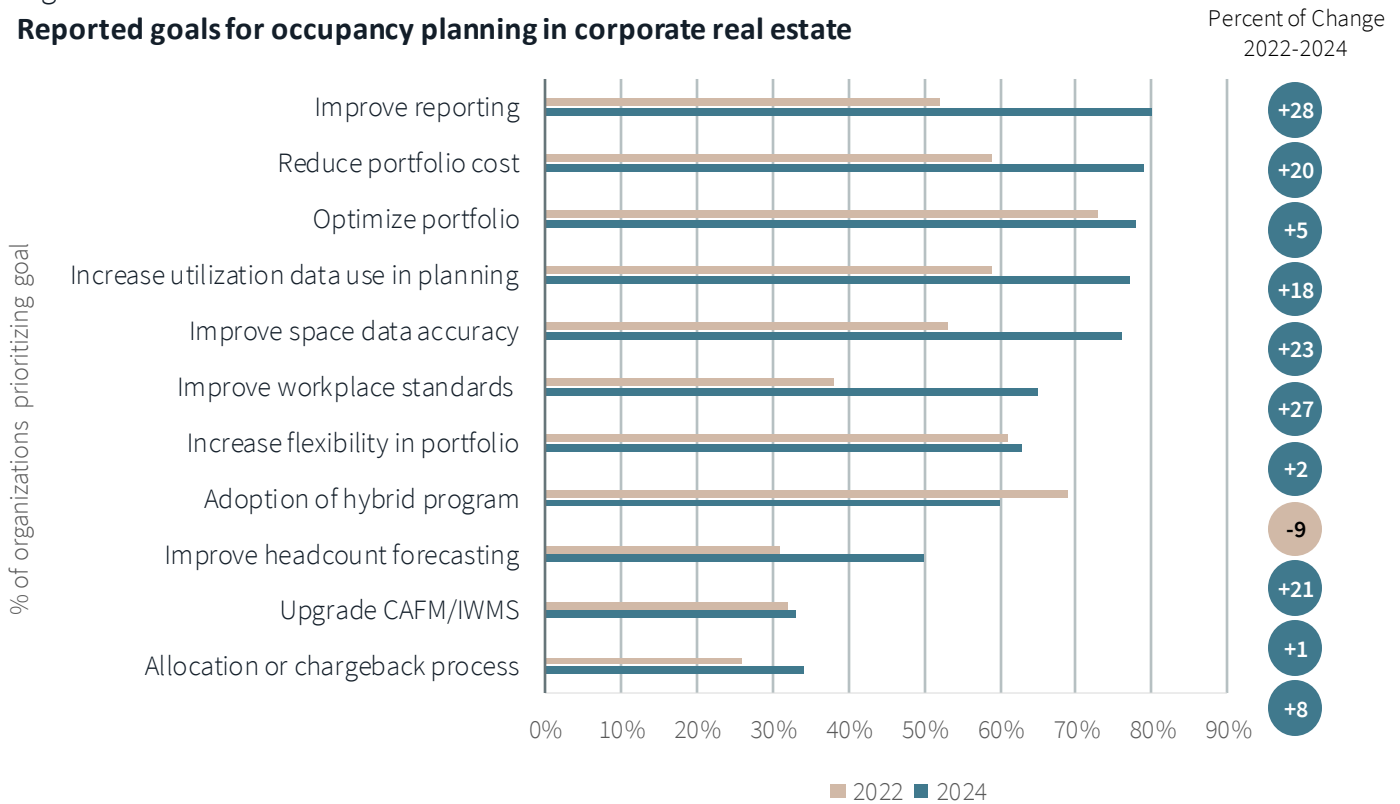


Increased spatial and technology complexity needs to be delivered within budget constraints.

¹ JLL Research 2023, "Is hybrid really working?"

Figure 1.

Reported goals for occupancy planning in corporate real estate



The most prominent drivers for CRE occupancy planning in 2024 are *improved reporting, reducing cost and portfolio optimization*, broadly reflecting wider challenges reported by CRE leaders as organizations look to use occupancy data to inform the adaptation of corporate portfolios following hybrid program maturity in 2022/2023.

The 2023 JLL Global Pulse Survey² found that most corporate clients are planning to modify their portfolios in the next three to five years, with 48% planning to decrease and 27% planning to increase. As many organizations reach lease renewal periods, now is the time to maximize value from occupancy and utilization data gathered in recent years and inform workspace investment decisions.

Occupancy planning and management is a critical component of successful CRE portfolio strategy and planning, particularly within the complexity of hybrid programs. This year the importance of occupancy planning for CRE goals has increased across every area except *hybrid adoption*, as the majority now have a hybrid program in place. Instead, there needs to be a shift toward occupancy planning and management being used to drive increased value from portfolios and hybrid programs.

Further to optimization, global businesses are looking to occupancy planning and data to inform workplace design and management, as *improving workplace standards* and *improved reporting* showed the highest increases of any goals.

²JLL Global Pulse Survey 2023: Global survey of JLL CRE accounts on portfolio strategies, hybrid working, planned investment and return to office

While there is no “one-size fits all” approach to a successful hybrid workplace, successful programs will use occupancy and utilization data to engage with stakeholders across corporate functions to integrate policy, space and change management. Our research found that while 87% of organizations have hybrid programs, only 33% have a change management program to implement this and only 1% include facilities management or workspace design in their hybrid program planning, leaving room for improvement.

Change management for hybrid programs is undervalued by many organizations, with only 33% reporting a program to support hybrid working, down from 46% in 2022.

The shift in post-pandemic work styles has accelerated trends toward agile working, higher seat-sharing ratios and more varied collaboration settings. As modern work styles evolve and employee experience expectations increase, our research has found that the type and ratio of work settings are changing.

The forward path for CRE leaders continues to be complex, balancing these competing demands. However, improved technology, resulting in more accurate data, can now provide greater certainty for hybrid programs and space requirements over time. Recent developments in sensors, analytics and AI will be used to connect occupancy data to broader data sources such as employee surveys or energy monitoring in the near future, creating greater opportunities for integrated and dynamic management of CRE portfolios.





1 Impact of hybrid working

Hybrid patterns and programs continue to evolve, with significant influence on corporate and commercial real estate strategy and planning.

Hybrid working remains a critical driving factor behind most workplace programs and patterns in 2024. Companies are having to embrace a hybrid workforce and are creating hybrid programs to support this. As hybrid programs have matured globally, there is now greater certainty for CRE leaders considering long-term portfolio planning, optimization and investment in their office space.

Adoption of hybrid remains challenging, however, as organizations take different approaches to returning to the office, and change management is an area of opportunity for maximizing value from hybrid programs.

Growth of hybrid programs

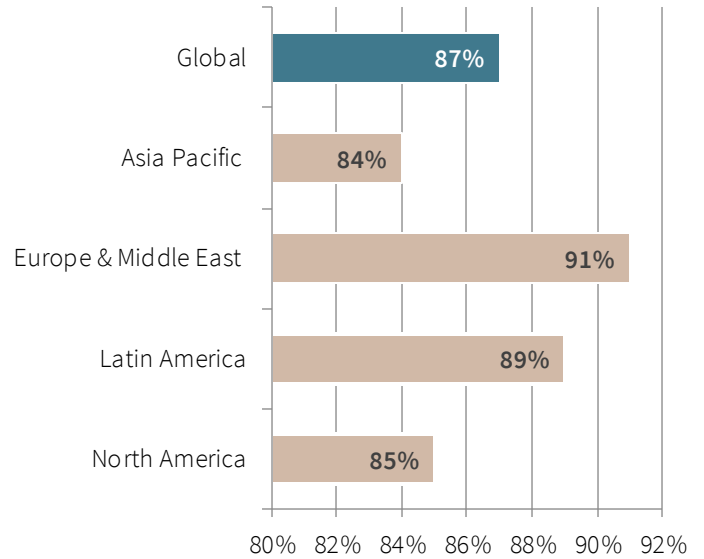
Work styles and programs have undergone a transformation since the pandemic, driven by hybrid working. More organizations than ever before have now embraced hybrid working and adopted a hybrid program, with 49% planning to expand these in the next one to three years. Hybrid programs provide opportunities to create more agile and flexible working policies and develop improved employee benefits and experience within these.

This is reflected in our research, which found that the top goals for hybrid programs globally include *optimizing space utilization*, but also *improving employee experience* and *supporting changing work styles*.

Understanding differing workstyles, whether based on job function, generational differences or behaviors, can provide vital information for planning successful hybrid workplaces.

Figure 2.

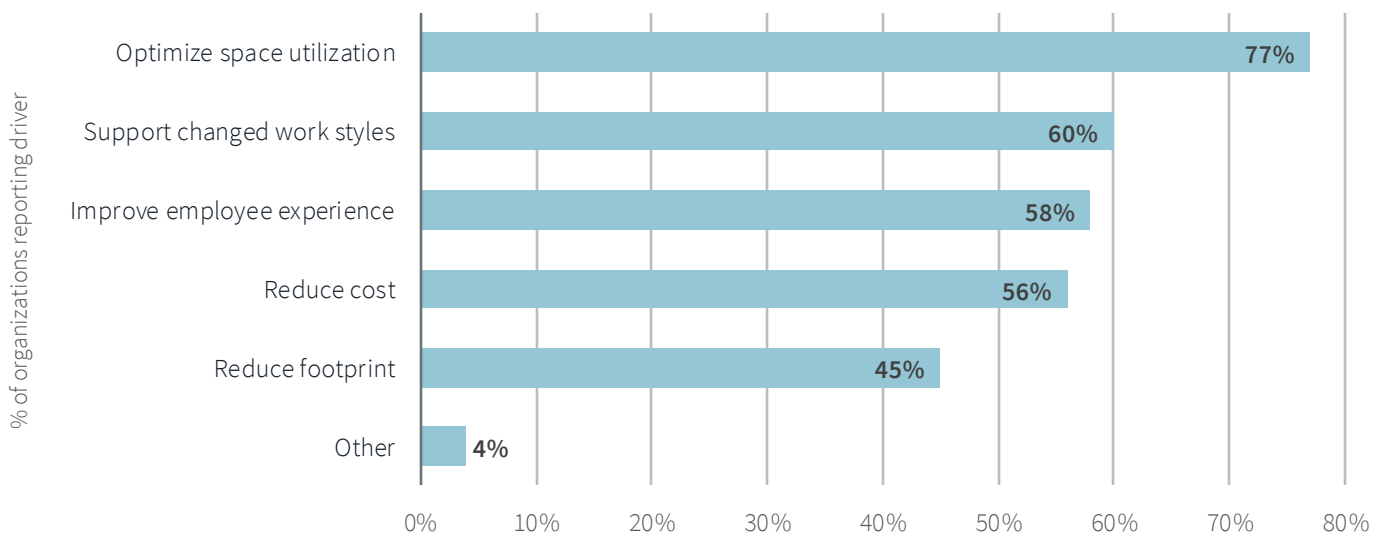
Hybrid program adoption, regionally



Hybrid program adoption varies globally. Hybrid working is most common in Europe, and lower in Asia Pacific and North America

Figure 3.

Drivers for hybrid programs



The employee experience of hybrid

Hybrid patterns continue to evolve in 2024, and return-to-office rates vary across the globe. Our benchmarking survey found that most organizations report having a weekly attendance frequency of one to two or three to four days.

Globally only 14% of organizations report employees fully returned to the office; however, this is notably higher in Asia Pacific where return-to-office rates have been higher. The variation in frequency patterns is often determined by workplace policy but also cultural and social variation between regions.

A recent JLL employee survey on hybrid working that captured the employee perspective was broadly aligned. We found that 87% of organizations are encouraging their employees to work from the office at least some of the time today and that the average number of days in the office in 2023 was 3.1 days globally.³

Employees have different experiences of hybrid working, with return-to-office patterns varying from fully remote and fully in office, to a wide spectrum of hybrid patterns.

Global

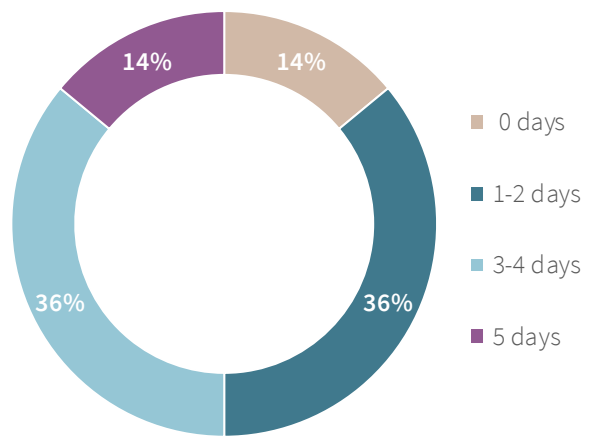
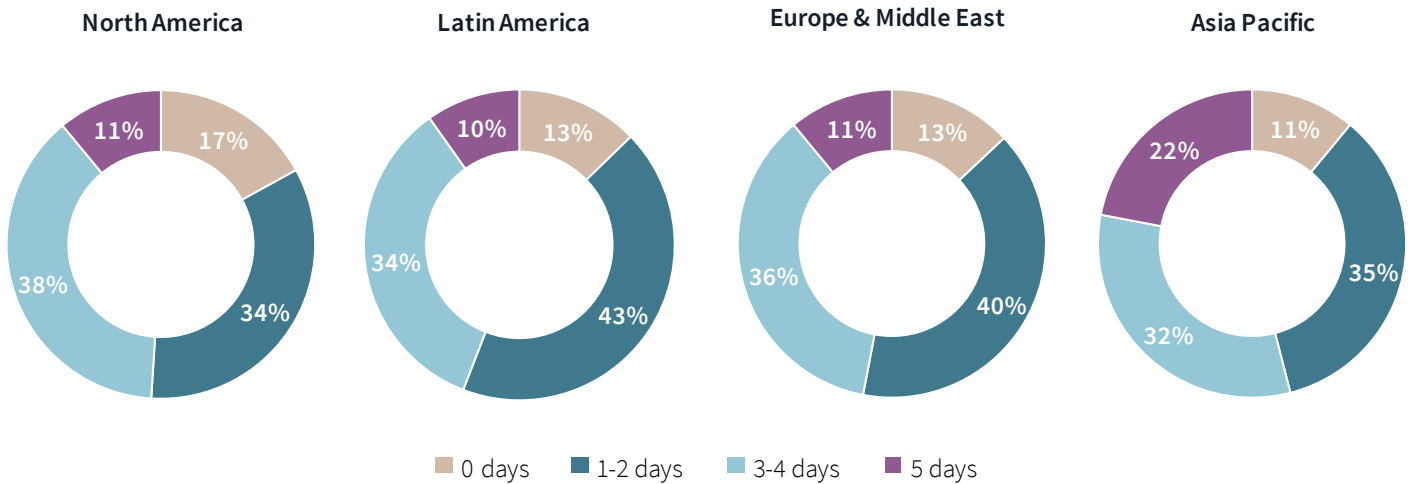


Figure 4.

Weekly attendance frequency: Average number of days in office, across office populations



³JLL Research 2023, "Is hybrid really working?"

Managing hybrid programs

The ability to plan for and manage fluctuating occupancy across a typical week is critical to the success of a hybrid workplace. Our research shows that hybrid working patterns are settling on broadly three days in the office, with office attendance clustering around Tuesday, Wednesday and Thursday.

Many hybrid programs are structured flexibly, requiring employees to be in the office for a fixed number of days at employee discretion, without any specific day required. Only 15% of organizations specify defined days for individuals or teams to attend in the office.

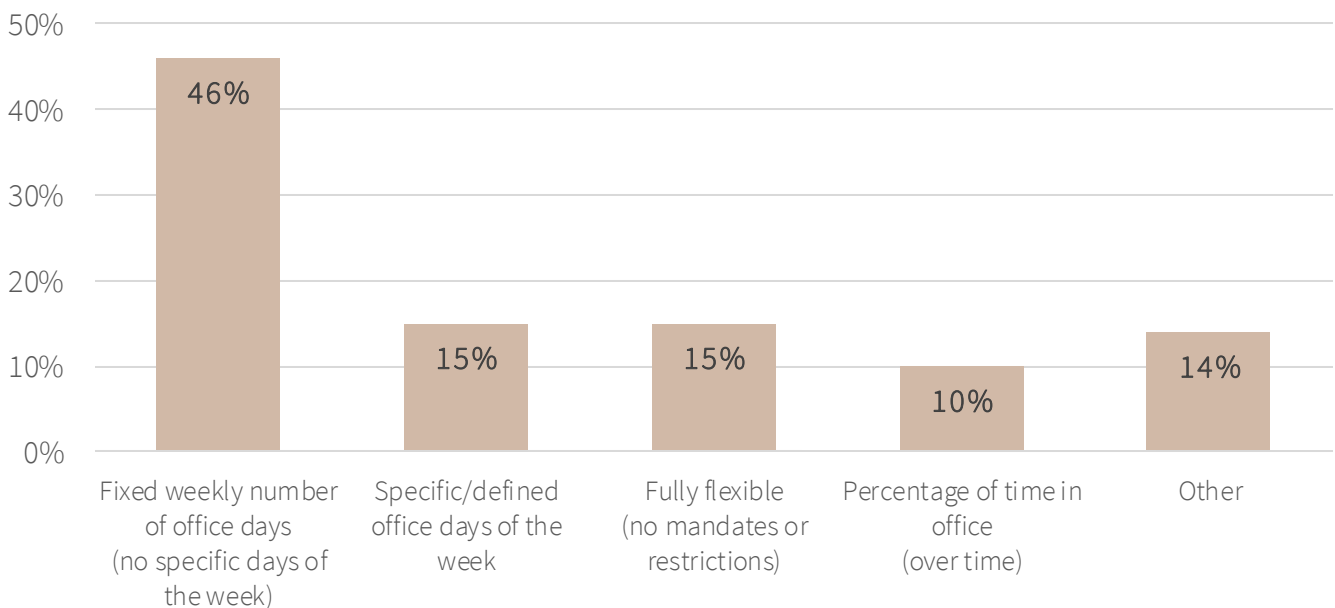
While this provides flexibility for teams and individuals to adapt their working week to suit week to week activities, project milestones or key meetings, it creates challenges in long-term planning and management of offices.

As hybrid programs mature, many employers are now looking to enforce these policies and develop more regularity in attendance and utilization.

Managing weekly fluctuations of occupancy and midweek clustering is a challenge for organizations globally, as more than 70% of organizations have flexible attendance policies.

Figure 5.

Structure of hybrid programs



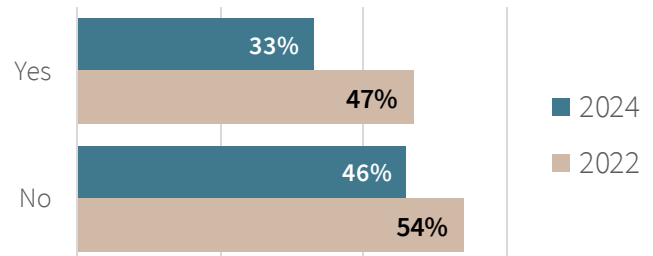
Adoption challenges

As organizations move from employee-incentivized policies to more employer-led policies or even mandates in some places, change management programs are critical to the successful adoption of the chosen approach.

The number of organizations with change management programs is low at 33% and has dropped from 46% in 2022. However, change management remains a necessary step to realizing employee engagement and increased office usage.

Maximizing value from hybrid programs requires the inclusion of different perspectives and expertise. While hybrid programs can have implications for operations, energy demand, amenity provision and maintenance programs, only 43% include IT and 1% include FM, security or workplace design in their development.

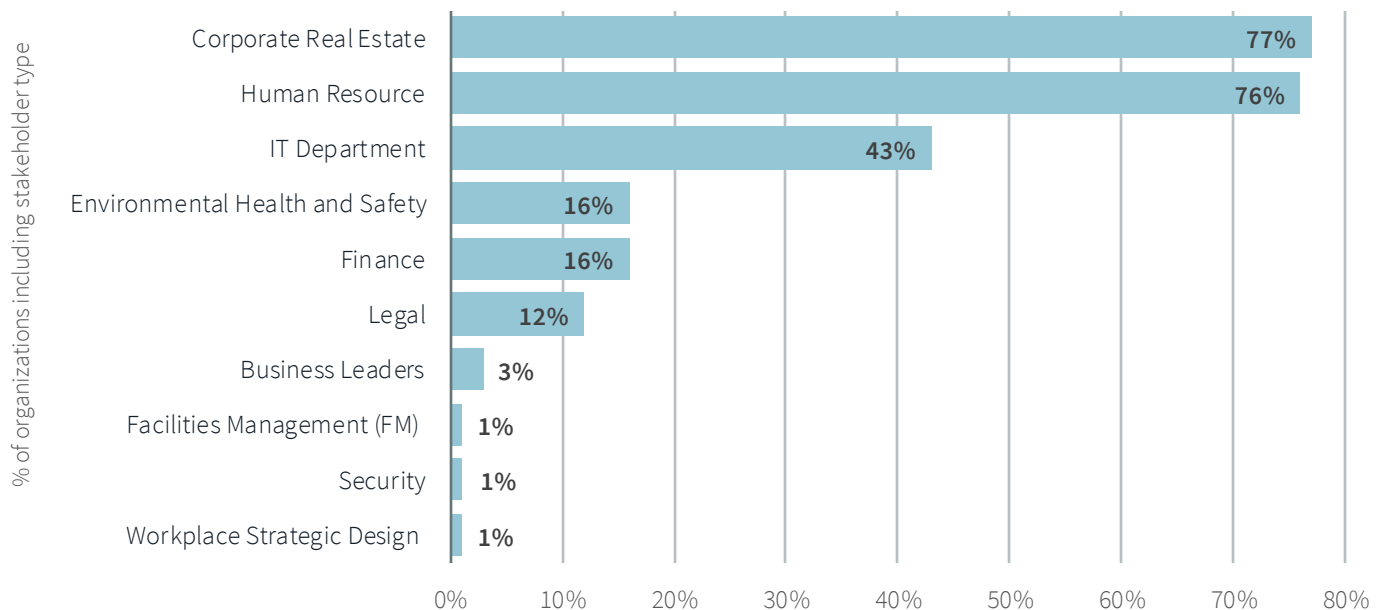
Figure 6. Inclusion of change management within hybrid program



Many forward-thinking organizations are now also working with their human resources departments to develop workstyle personas for space planning.

While 76% of respondents said they include HR in hybrid programs, only 3% involve business leaders, highlighting opportunities to better integrate these within the day-to-day management of a hybrid workplace.

Figure 7. Stakeholders involved in hybrid programs



Seat sharing increasing

We have seen longer-term trends toward seat sharing and agile workplaces increasing over the past five to ten years, reflecting tech-enabled flexible working, flexible working policies and space efficiency goals.

Many companies are now implementing seat sharing as part of a hybrid program, in efforts to optimize their workplace portfolios.

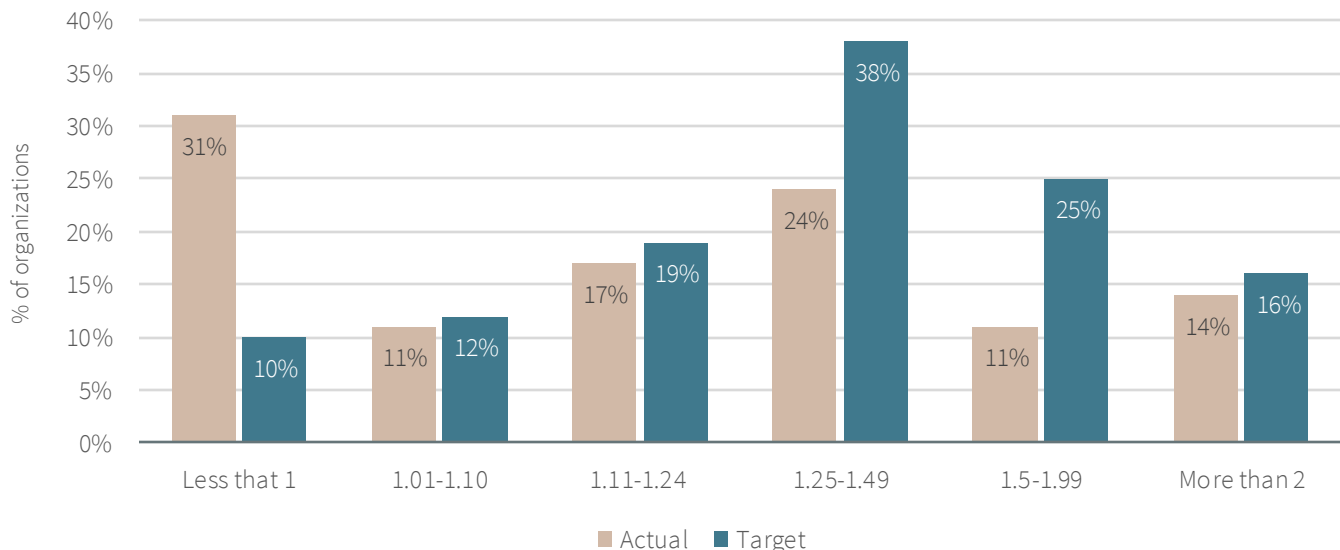
69% of organizations reported having a seat-sharing ratio of more than 1, indicating that seat-sharing is actively happening across organizations.

Future targets for seat sharing are more ambitious than current targets, with 90% reporting they intend to implement seat-sharing ratio of more than 1 in the future, showing continued acceleration to higher sharing ratios is expected.



Seat sharing is on the rise but will take time to embed across organizations. 69% of organizations surveyed have a factor of seat sharing now, but 90% plan to implement or increase sharing in the future.

Figure 8. **Actual vs. target seat-sharing ratios** (people per seat)





2 Trends in occupancy benchmarks

Occupancy and utilization data is helping CRE leaders globally to manage their ongoing development and implementation of hybrid programs.

While optimization of office spaces and portfolios remains the highest priorities for CRE leaders in occupancy planning, improving data collection and accuracy were also top drivers.

Increasingly complex demands on space are shifting focus to utilization metrics that can more accurately account for shared seating and hybrid working.

As technology evolves and improves the accessibility, accuracy and frequency of data collection, the value of data is coming to the forefront of occupancy planning, occupancy management and workplace design.

Benchmarking across relevant metrics has always been an important part of successful workplace planning and management. *Utilization* has become the most important metric for organizations in 2024, providing a temporal measurement useful for hybrid workplaces and shared seating policies that *vacancy* cannot.

A new metric this year, *space functions*, shows the growing need to capture occupancy data on broader space types. There remain challenges as these may not provide a full picture of space usage due to lower assigned seating and agile, hybrid working patterns.

As organizations face increasing pressure to reduce footprints and operational costs, metrics such as *density* and *cost per seat* continue to be go-to metrics to support real estate strategies. However, further value could be drawn from *cost per seat* metrics as its relevance has varied and now ranks fourth as a metric.

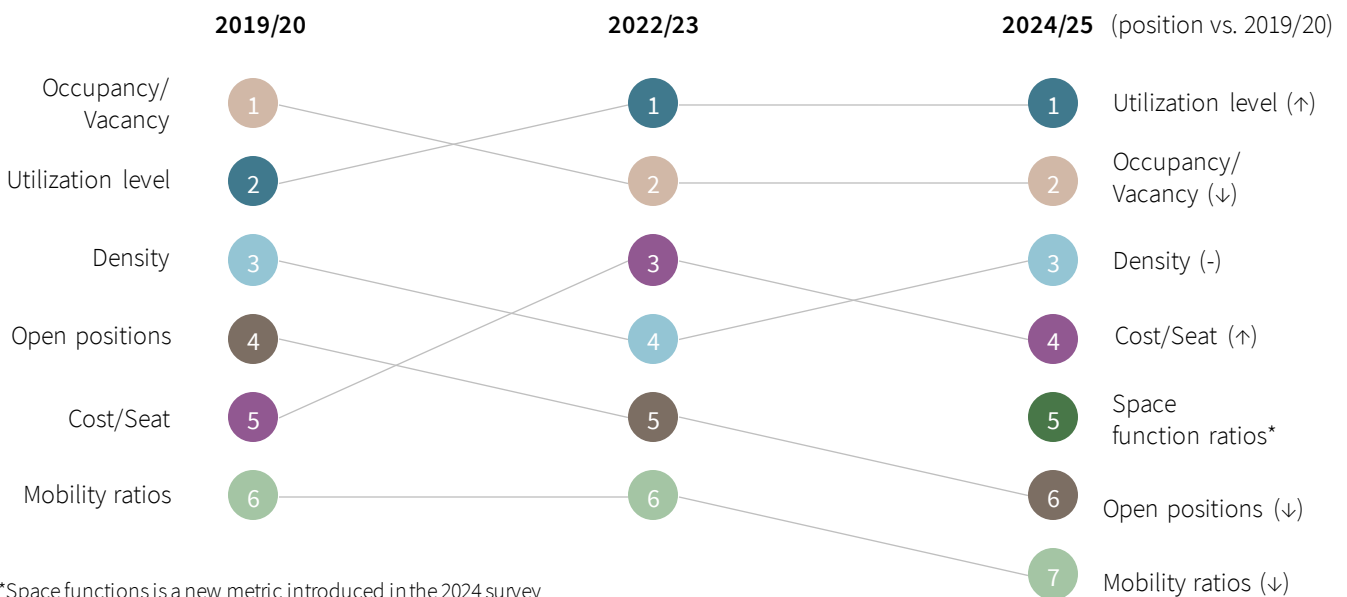
Occupancy metrics definitions

(See appendix for further detail)

- **Vacancy level:** % of seats that are vacant, compared to total available
- **Occupancy level:** Inverse of vacancy, % of seats that are occupied
- **Utilization rate:** % of the time that individual seats or spaces are occupied over a specific time. (working days, shifts etc.)
- **Density:** Measure of efficiency calculated by dividing office area by population or number of seats
- **Space functions*:** Ratio of space type categories to understand the attributes of space
- **Cost / seat:** Operational costs per person
- **Open positions:** Number of seats available within a portfolio or office
- **Mobility ratios:** Ratio of seats to population

Figure 9.

Occupancy metrics, ranked by relevance



More companies than ever are now reporting tracking utilization data, with 77% of respondents in 2024 compared to pre-pandemic levels of 61% in 2019. Improved technology for sensors, badge tracking and other methods has improved the accuracy and relevance of utilization data in comparison to previous years. Most organizations are now using utilization data to inform planning, and many have used data to determine their hybrid program.

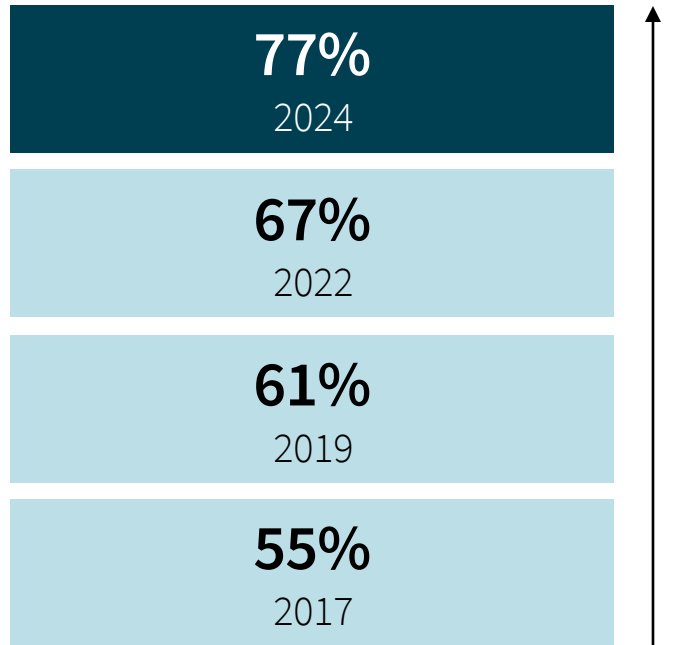
Utilization data is increasingly integrated into planning and hybrid program decisions. 72% use utilization data for planning solutions, and 43% for determining hybrid program style.

Tracking hybrid work settings

Utilization tracking for secondary spaces or non-office spaces is much less common, although as hybrid programs continue to mature and there is an increase in space types in workplaces, this is likely to increase in coming years. Increased demand for less traditional workpoints such as touchdown areas or quiet work areas, and an increased use of varied collaboration spaces will become more difficult to manage.

Currently only 29% of organizations track utilization of meeting rooms, and only 7% track non-office space (e.g. labs, additional facilities, etc.). However, technology developments for space monitoring, data analytics and visualization platforms will allow this to become more cost effective and widely integrated in workplaces.

Figure 10.
Proportion of companies tracking utilization data

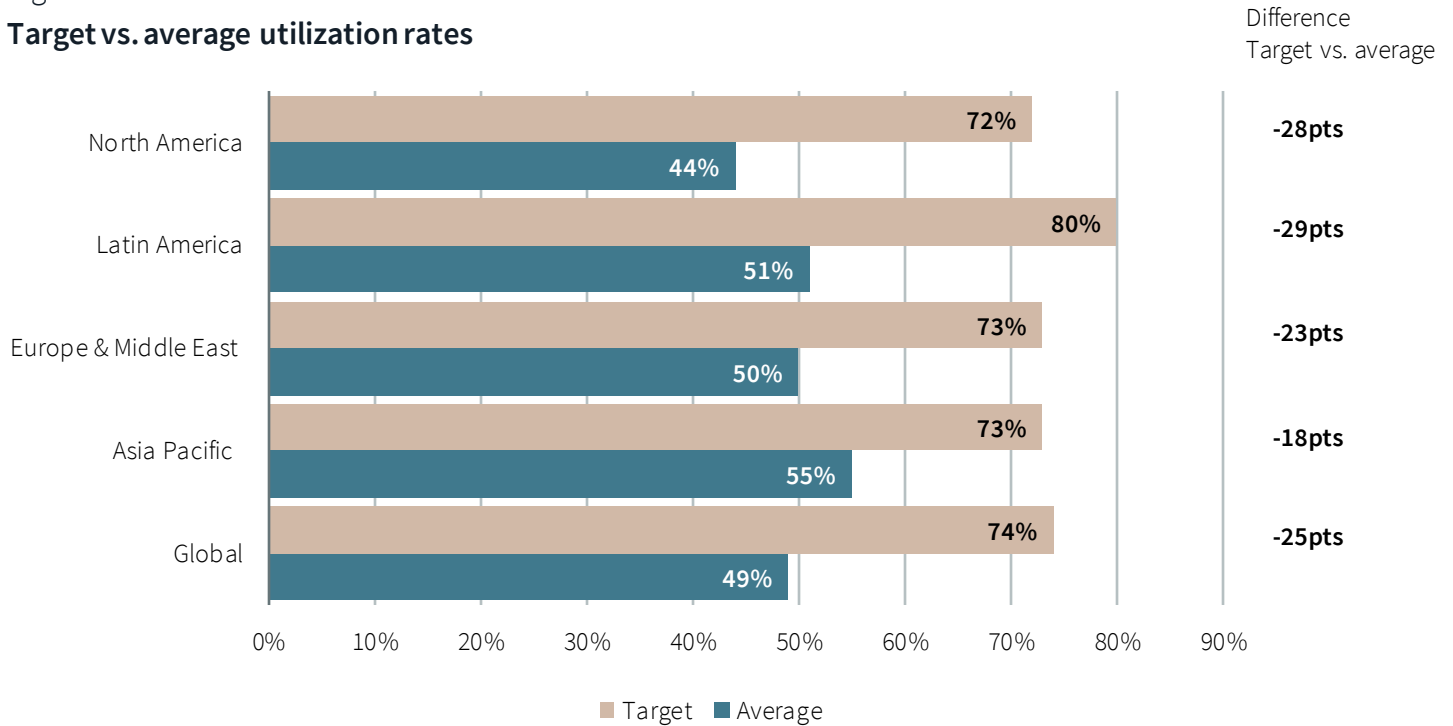


More integrated data networks will also allow other data sources such as employee surveys or environmental data to be connected, unlocking insights into the nuances of occupancy or utilization behavior and employee experience in the future.



Figure 11.

Target vs. average utilization rates



Utilization

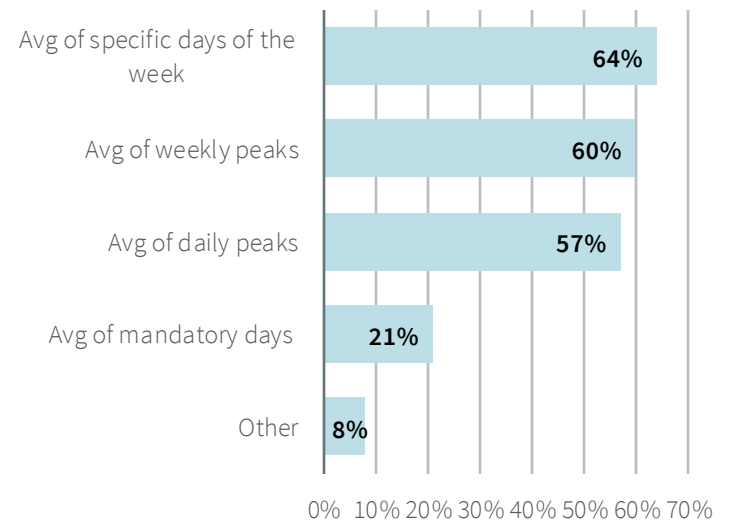
Across all regions, the average actual utilization rates reported are lower than average target utilization. This discrepancy is to be expected in today’s modern real estate landscape and is greatest in North America and Latin America. Attributed in part to hybrid working, this gap has been a challenge for employers since pre-pandemic and is related to more agile and varied work activities, tech-enabled remote working and increased collaboration in most knowledge sectors. In North America and Latin America, a slower return-to-office rate than in Asia Pacific or Europe has also contributed.

Actual utilization rates are 49% on average globally, falling short of the average target of 75%.

The approach to calculating utilization corresponds to the way that most hybrid programs are structured, with most organizations using an average of non-specific daily or weekly peaks.

Figure 12.

Approach to utilization calculation



As utilization tracking has matured in recent years, the variety of both static and dynamic metrics has increased. This allows for a range of factors to be included, providing more holistic understanding of space usage in a dynamic workplace. However, this also creates a complexity in agreeing to standard measurements.

The most common occupancy metric used for design is people to seats ratio, followed by space per seat. There is less focus on other seat types or collaboration spaces in current workplaces.

Seat utilization remains the top metric for dynamic measurement of occupancy, but this may also shift in the future as the variety of workspace settings evolves.

Figure 13.

Approaches to occupancy and utilization metrics

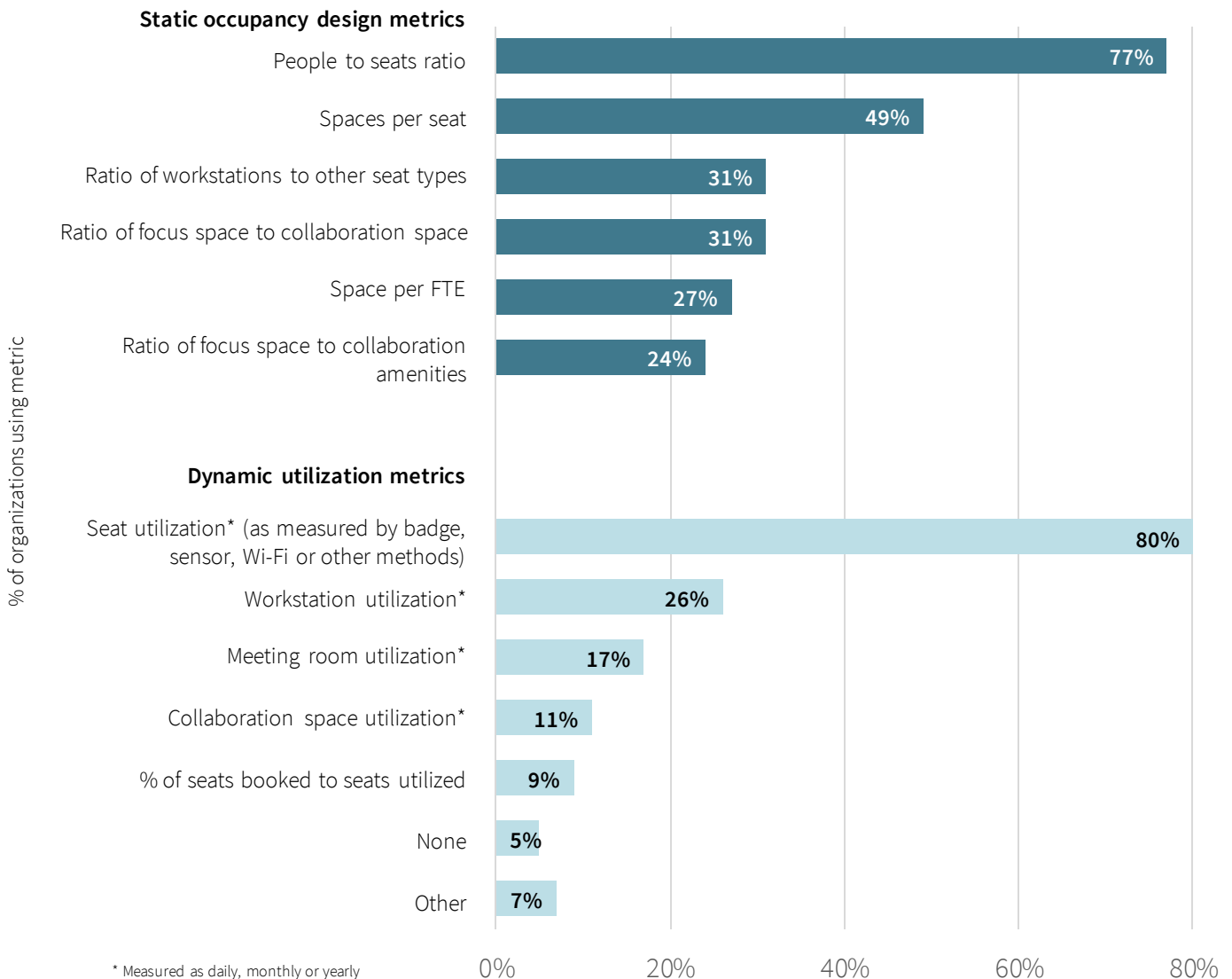
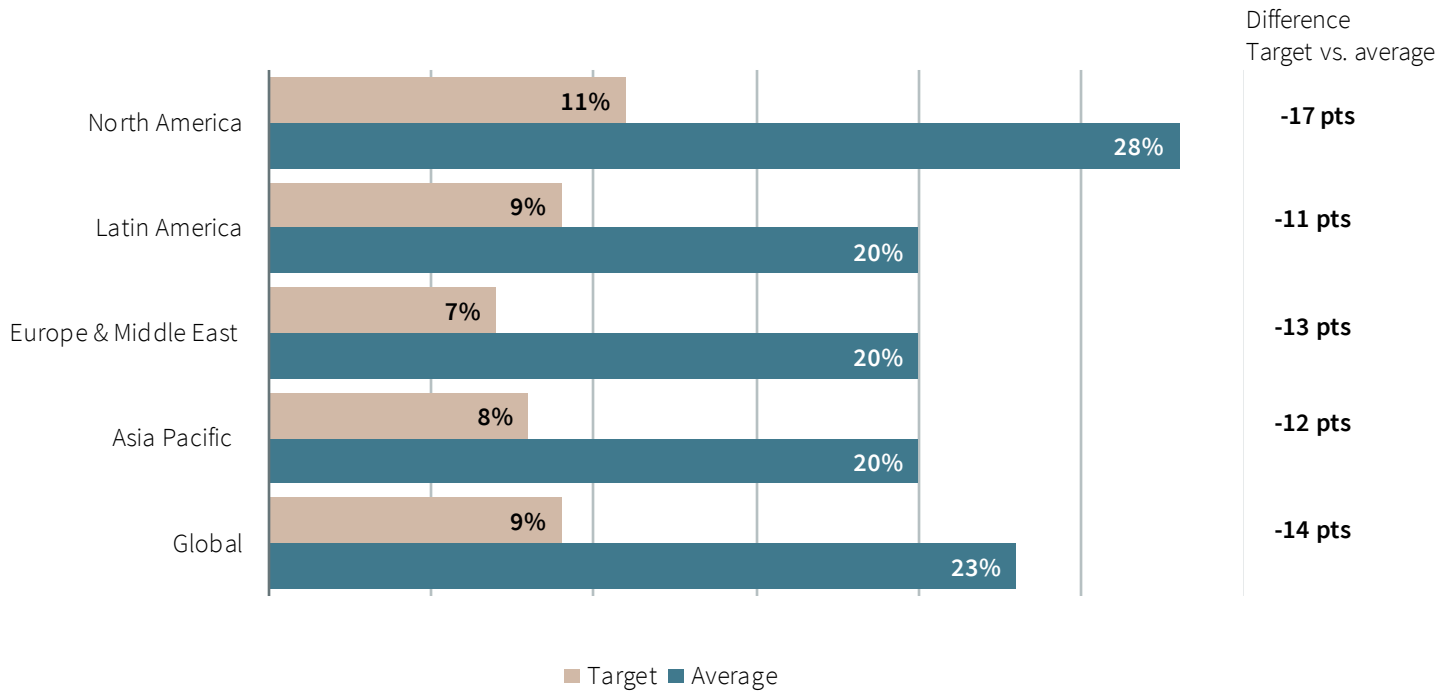


Figure 14.

Average vs. target vacancy rates



Vacancy

Historically vacancy rates have been used as a key benchmark for occupancy planning; however, their relevance has been waning in recent years. The seat vacancy rate uses the number of occupied or assigned seats as its defining factor.

While this is a useful measure for assessing potential need for increasing or decreasing the number of seats, and related floor space, it doesn't account for seat sharing or hybrid workspaces where employees may be using collaboration spaces more often than individual seats.

Across all regions, average vacancy is higher than target vacancy; globally the average is 23% and the target is 9%.

Regionally North America has the greatest difference between current and target vacancy rates (28% vs. 11%), and other regions show more similar trends (20% vs. 7%-9%).

This may be due to workers who have not returned from remote working or reflect moves to seat-sharing policies that have reduced the number of seats needed but not yet reduced the overall footprint.

Figure 15.

Reported average density, by seat and person

Region	RSF per seat	RSM per seat	RSF per person	RSM per person
Global	167 s.f.	16 sq.m.	171 s.f.	16 sq.m.
North America	205 s.f.	19 sq.m.	219 s.f.	20 sq.m.
Latin America	156 s.f.	14 sq.m.	179 s.f.	17 sq.m.
Europe & Middle East	159 s.f.	15 sq.m.	144 s.f.	13 sq.m.
Asia Pacific	129 s.f.	12 sq.m.	126 s.f.	12 sq.m.

Density measures

Workplace density is increasingly a focus for organizations, as they look to optimize portfolios. Density metrics used can vary, using either seats or people to determine density. Globally, area per seat is the most used density metric, with 85% of organizations reporting they use RSF/seat, followed by RSF/person at 38%.

Only 4% report using usable square foot (USF) per seat or person. However, this is a relatively new metric which become more popular in the future, as it is more useful for planning and space design.

Area per seat is the most commonly used density metric, with 85% of organizations reporting they use RSF/seat, followed by RSF/person at 38%.

Current global standards show the average density reported for RSF per seat is 168.9 (RSM 16) and average density per person is RSF 165.1 (RSM 15). Density is highest in North America and lowest in Asia Pacific, reflecting local workplace practices and culture.

Density standard definitions
(See appendix for further detail)

RSF/RSM per seat: density metric determined by overall capacity

RSF/RSM per person: density metric determined by the overall population

Rentable Square Feet (RSF) or Rentable Square Meter (RSM): area within a building that is included in rental charges

Usable Square Foot (USF) or Usable Square Meter (USM): area within a building usable by occupants



3

Evolving nature of workplace design

As businesses re-evaluate how physical workspaces should adapt to hybrid work, many organizations are grappling with how to redesign and futureproof their offices.

Real estate is seeing a shift toward a wider variety of work settings within an office, with increased seat sharing and higher demand for secondary spaces such as collaboration spaces, meeting rooms and focus areas.

While hybrid working has created a new flexibility for employees, office work is still largely focused-work as much as it's collaborative. Balancing employee experience needs in a more complex spatial environment is a critical challenge for employers, as there is higher demand for focused and quiet spaces to support individual working.

Designing for hybrid workstyles

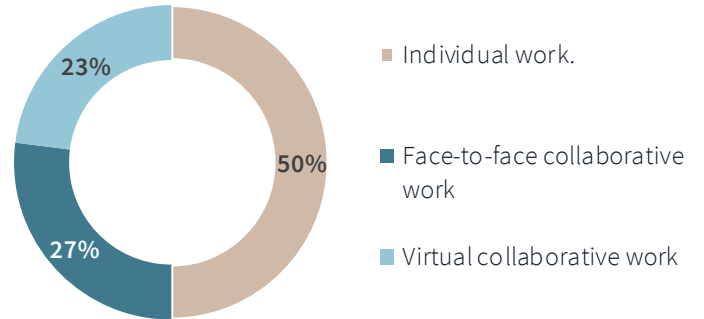
In today's hybrid working environments, understanding workstyles and employee experience is paramount to creating workplaces that optimize performance, general satisfaction and even innovation. While most organizations aim to support changing work styles with their hybrid programs, these can be difficult to define.

New hybrid work styles include higher levels of collaboration, both virtual and face-to-face, but still the need for focused, individual work. Recent JLL research found that while employees value collaboration, individual working remains the most common activity in the office, with an average of 51% of time spent on this type of activity.⁴

Work styles are dynamic and influenced by technology availability, company culture and personal preferences. They often vary across job function and teams, requiring careful assessment for individual organizations.

Figure 16.

Types of activities undertaken in office⁴



Some employees thrive in open and collaborative spaces, while others seek quiet enclaves for focused, head-down work. Contemporary workplaces provide a greater variety of settings than ever before, with varieties of individual work areas and collaboration spaces. Supporting new work styles and improving experience through new and diverse workspaces requires careful design strategies to achieve the optimum balance of spaces, encourage employee engagement and improve occupancy rates.



⁴ JLL Research 2023, "Is hybrid really working?"

Space and choice for individual work

The demand on individual workpoints or seats is now driving a change in how a seat is defined or counted. There has been an increase in alternative “seats” or workpoints such as hoteling seating, phone booths and touchdown spots to accommodate shorter-term working. While these are intended as shorter-term workpoints, many businesses are seeing greater demand for these and including them in overall seat counts.

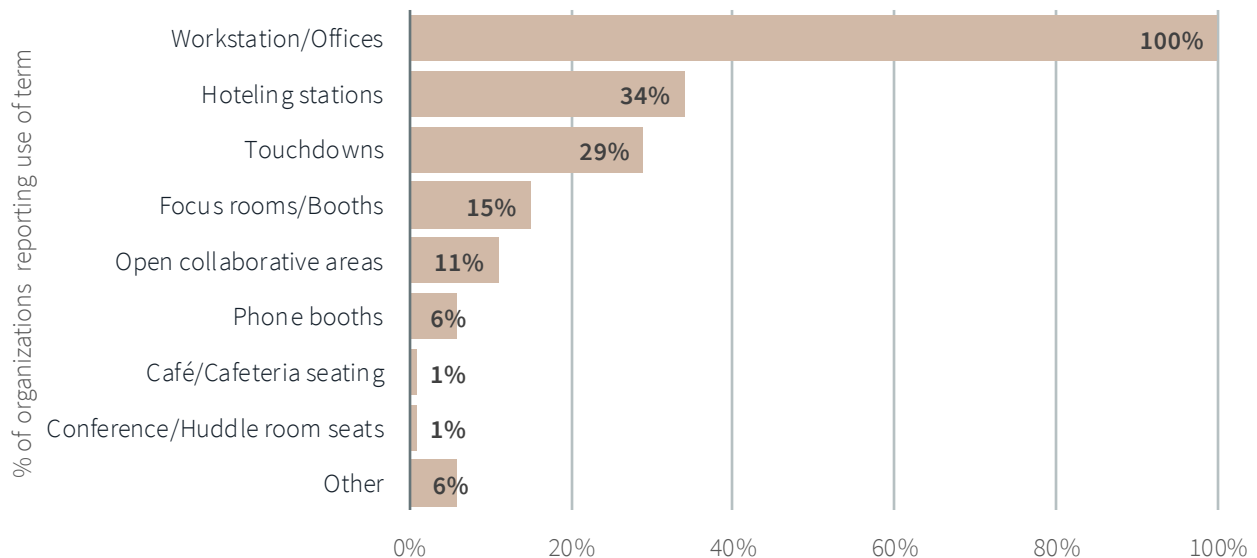
Increases in hoteling stations and touchdowns, with their smaller footprints on average, as considered seats in occupancy planning can have considerable impact on the number of seats that can be provided. These increasingly fluid definitions of workpoints are pointing to three key components that will define a ‘workpoint’ in future planning: power supply, a surface for a laptop and a supportive chair or seat.

Power supply, a work surface and a place to sit are three vital components for the future definition of “seat” or “workpoint”.



Figure 18.

Options considered a workpoint or counted as a seat



Workplace design trends

Competing requirements of focused and collaboration activities are leading to more intensive demand on workplace settings. Trends toward lower desk ownership and increases in collaboration space have driven many workplace design decisions in recent years.

Organizations have increased shared workstations, focused spaces and collaboration spaces in the past year.

Early hybrid programs often focused on “collaboration-first” policies, implementing reduced individual workstations and increasing collaboration spaces. However, a more nuanced understanding of daily office activities shows that individual workpoints are just as important. The lack of quiet and focused spaces and need for individual workpoints during weekly occupancy peaks is a continued challenge across all sectors and industries.

While many organizations are reluctant to make significant changes to their physical space, organizations who did report change showed a clear direction of travel in workspace design and planning. The variety of seat types now used as workpoints has increased and many organizations are reducing the number of dedicated workstations to make room for these alternative and shared workstations. Many organizations are now re-assessing their offices and reconfiguring spaces with increased flexibility and adaptability to keep pace with evolving business requirements.



Trends continue toward shared seating

24%-26%

reduced the number of dedicated or enclosed workstations

35%

of organizations increased amount of shared workstations in the office

18%-32%

are adding alternative workstation seating including benches, touchdown seating and open team tables

Spatial variety is on the rise

38%

have expanded the number of focused rooms or phone booths

40%

boosted the amount of their collaboration spaces

Work settings

This year, for the first time, we asked organizations to estimate how different space types were increasing or decreasing. The most common changes in the past year were in collaboration areas

and focus areas and a move toward shared and open workstations. While the majority of organizations have not made changes to their space types, this will likely continue to evolve and expand in coming years.

Figure 19.

Proportion of organizations reporting changes in space types in 2023

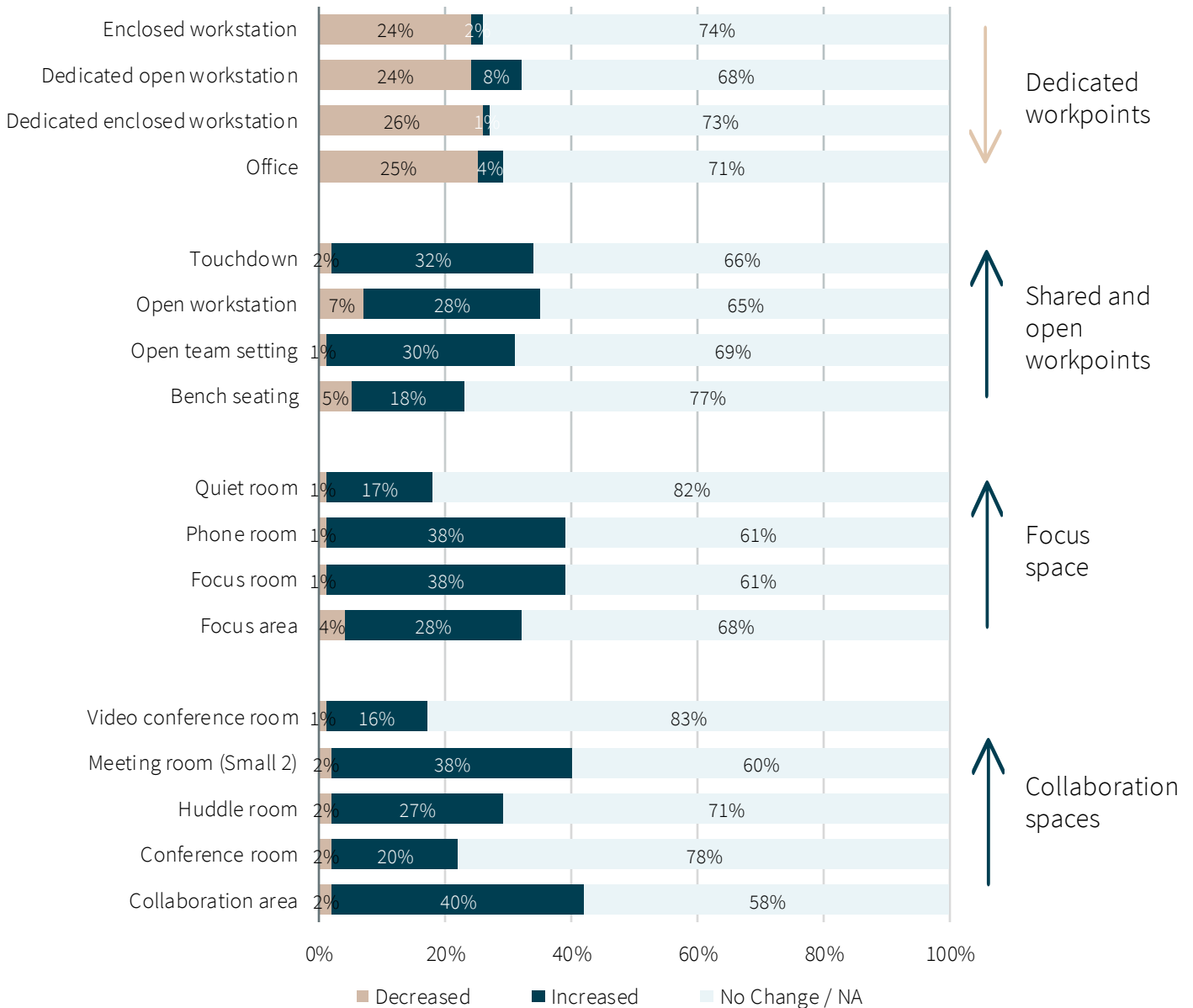
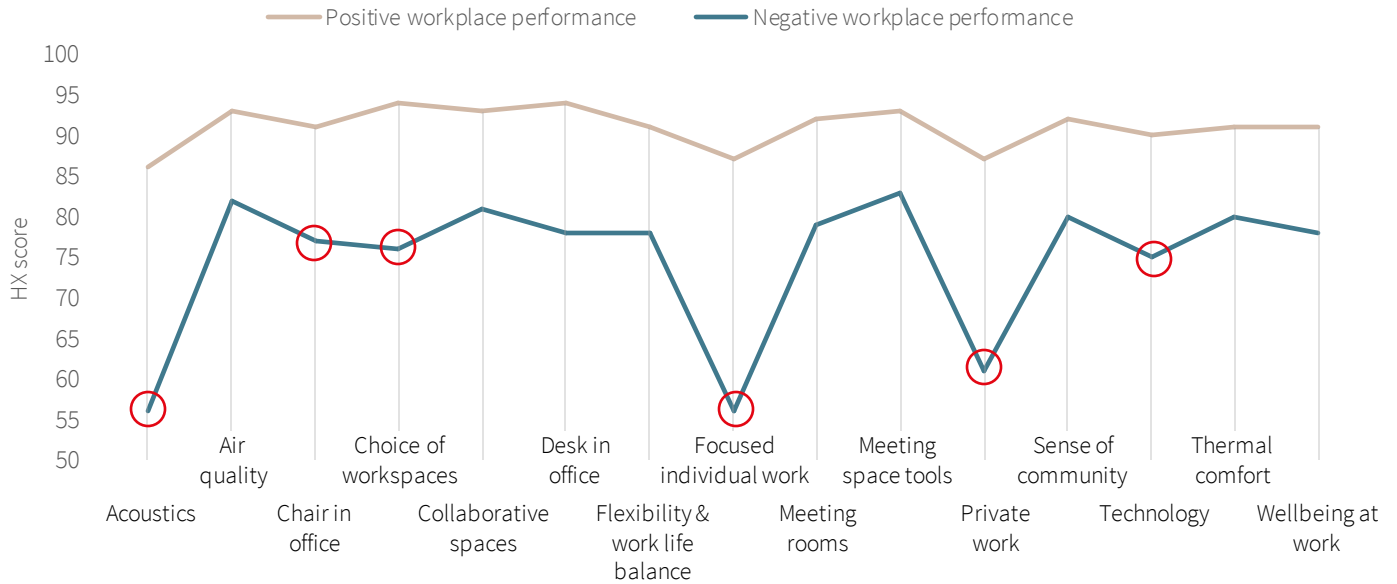


Figure 20.

Workplace factors and productivity⁵



Creating productive workplaces

As work styles evolve, many employees are reporting that their current physical workplace is negatively affecting their performance. The JLL Human Experience (HX) score is an assessment of workplace design on employee experience, based on an employee survey carried out by our Global Benchmarking Services (GBS) team. The survey also rates current workplaces as negative or positive for workplace performance.

Based on JLL HX surveys carried out in offices between 2021 and 2023 globally, we found that *choice of space, privacy, individual workstation quality and quiet, focused work areas* are the workplace factors that are reported to most negatively impact performance.

The comparable trend line shows how important these factors are for having a positive impact on performance. This highlights the factors that make the biggest difference between a “productive” workplace and a “non-productive” workplace. From the results of our OP benchmarking survey, we have found that these are closely related to the work settings with most changes (Figure 19).

Understanding the office factors that most affect employee performance will help companies make smarter decisions and prioritize improvements to the physical space and workplace settings.

As organizations look to adapt their physical workspaces, employee surveys can help unlock work sentiment toward space, helping your organization to target improvements to support employee performance, satisfaction and well-being.

⁵ Based on JLL HX surveys undertaken by our Global Benchmarking Services team between 2021 and 2023. Most impactful factors for performance included. JLL HX survey assess 60 workplace factors in total.

The role of space standards

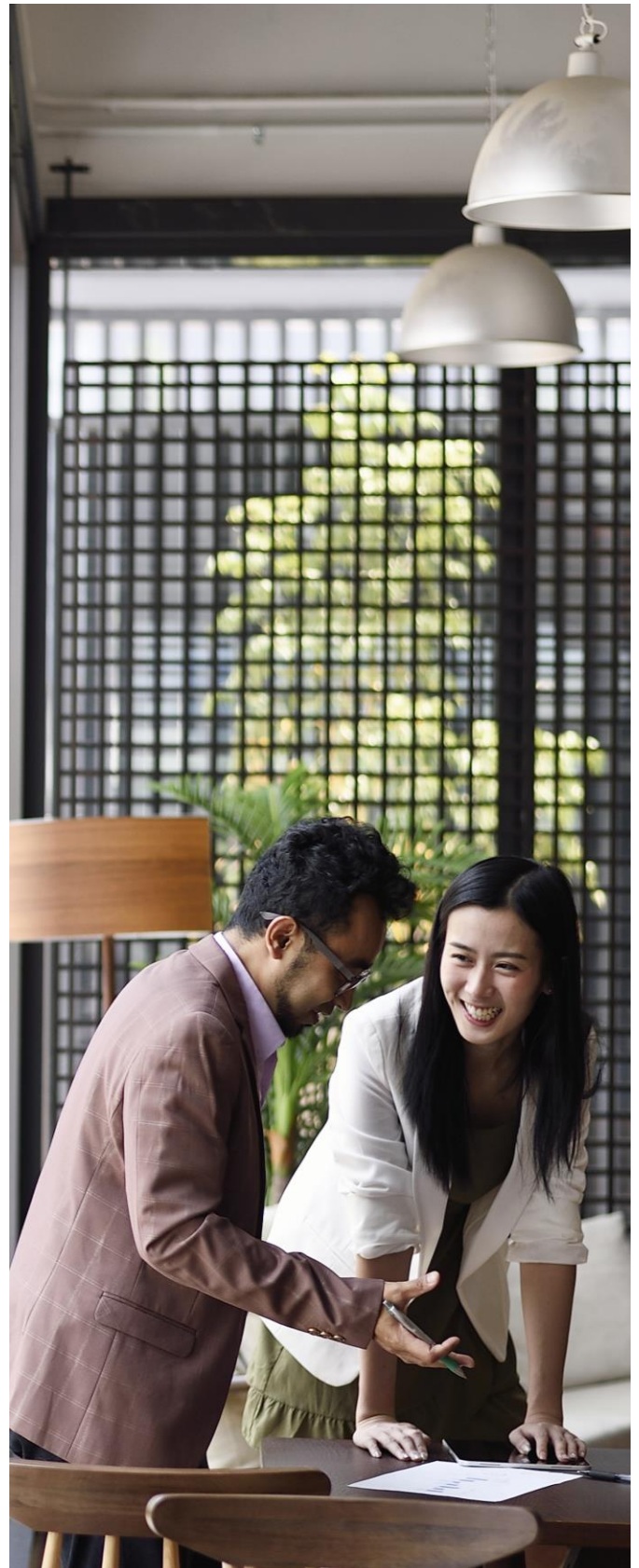
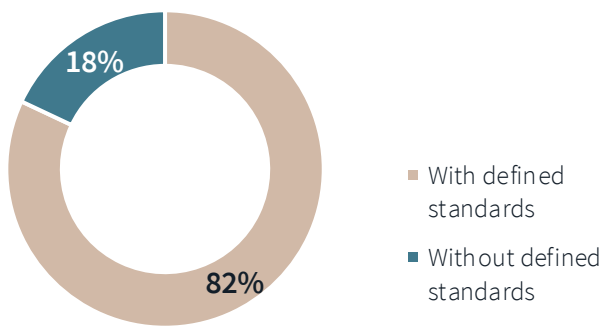
Use of space standards fluctuated in recent years in response to space requirement uncertainty amid rapidly changing environments post-pandemic.

This year 82% of organizations report having defined standards for space functions and types, up from 71% in 2022. However, these have not yet returned to the levels of 2017-18, where 91% of organizations had defined space standards.

With increasing dynamic workplace requirements, space standards for hybrid workplaces should also integrate standards for workplace management, technology integration, facilities management and operational maintenance.

Figure 21.

Organizations with defined standards for space functions or space types, 2024





4 Technology integration and value

Organizations are shifting to more technology-led utilization strategies, integrating badge data and investing in reservation systems to meet strategic CRE goals.

Data is critical to unlocking value and optimizing workplaces for both employees and employers. Connected data and integrated technology can unlock insights and support CRE strategies and goals. CRE functions are looking to connect the dots with their technology and understand how integrated technology and holistic data strategies can enhance hybrid programs and provide an understanding of how space is assigned and used.

Improvements in technology that provides utilization data, advances in AI and data visualization software will influence the way space utilization is tracked and managed in the future and is already allowing more dynamic management of offices.

Integrating technology in the workplace

Highly effective hybrid workplaces may require additional technology support, with improved reservation systems and enhanced virtual conference facilities key to avoiding interruption to business operations.

Many organizations have invested in technology to support the adaptation of physical spaces for hybrid programs, with 44% of organizations implementing IT modifications for hybrid working and 40% investing in enhanced conference room technology.

Investing in integrated and improved technology for hybrid working will continue to be a focus for CRE leadership. JLL's Global Real Estate Technology Survey 2023 found 85% of occupiers were planning to increase technology budgets in the next three years, while 91% are willing to pay a premium for tech-enabled space.⁶

Maximizing value from reservation systems

54%

have invested in reservation systems to support the implementation of hybrid programs

52%

are using reservation systems as a method to track utilization

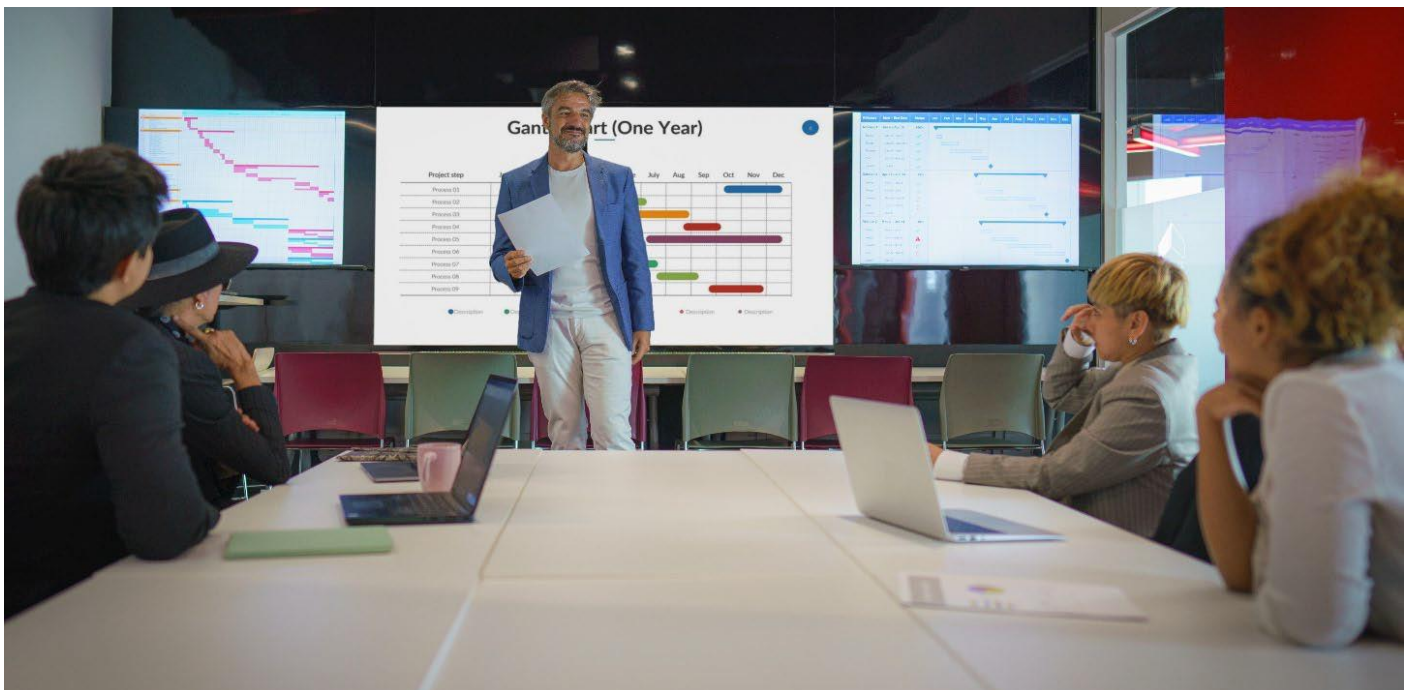
Hybrid technology needs

44%

invested in IT modifications including for shared spaces

40%

have implemented enhanced conference room technology



⁶ JLL Research 2023, "Global Real Estate Technology Survey?"

Dynamic workplace management

Successful hybrid workplaces require ongoing review and assessment of occupancy patterns and utilization to manage erratic working patterns and fluctuating demand on space. Technology is increasingly used to monitor utilization, with badge swipe data and reservation data being the most common methods.

Companies are shifting away from visual observations overall, with 36% of organizations reporting visual observations for utilization tracking, down from 75% in 2017.

Tracking attendance with badge data has become the definitive approach, with 97% of respondents to this year's survey noting they use badge swipe data for utilization tracking. Just seven years ago that number was 36% of respondents using badge data to track utilization.

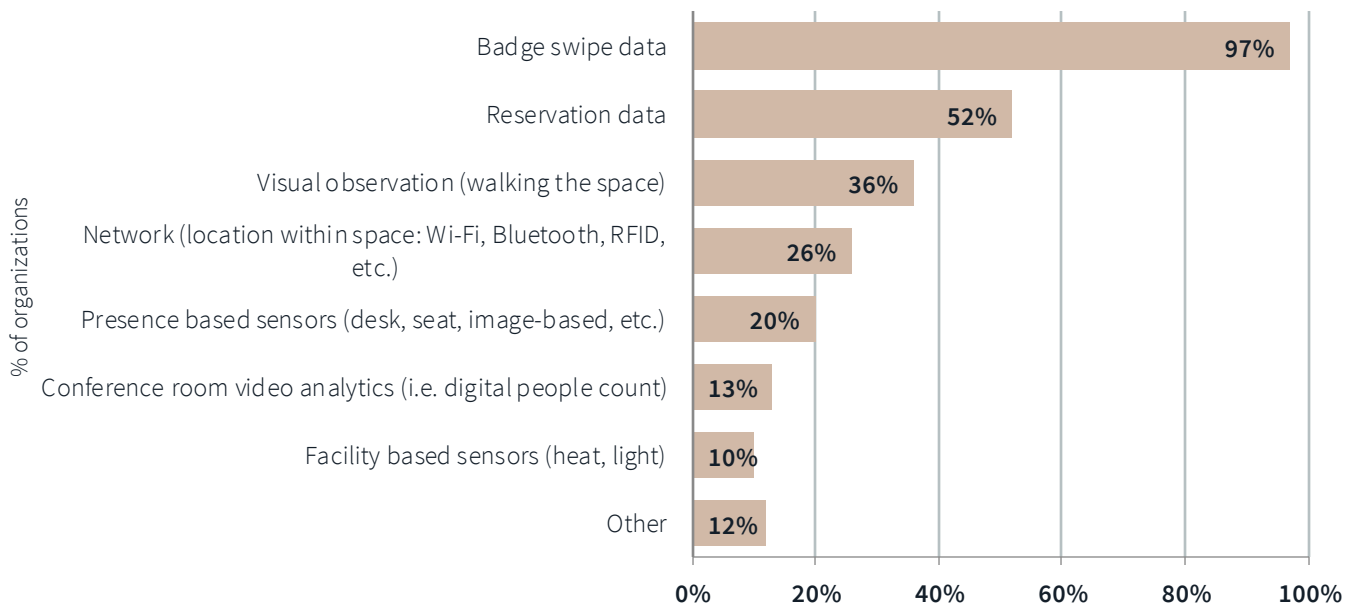
Reservation systems are taking a strong hold in supporting the hybrid structure, with 52% of organizations implementing them to support a hybrid program and using that data to understand utilization.

Many organizations are now also recognizing the value of change management and transparent communication for integrating the technologies that impact and require use by employees, such as sensors and reservation data.

Forward-thinking companies will be looking at how technology can support tracking utilization of these ancillary spaces, which are increasingly important in a hybrid workplace.

Figure 22.

Utilization tracking methods



Dynamic planning

Improvements in the scale and accuracy of utilization data for workplace management and occupancy planning provides opportunities for many organizations to further digitize their building and occupancy management systems.

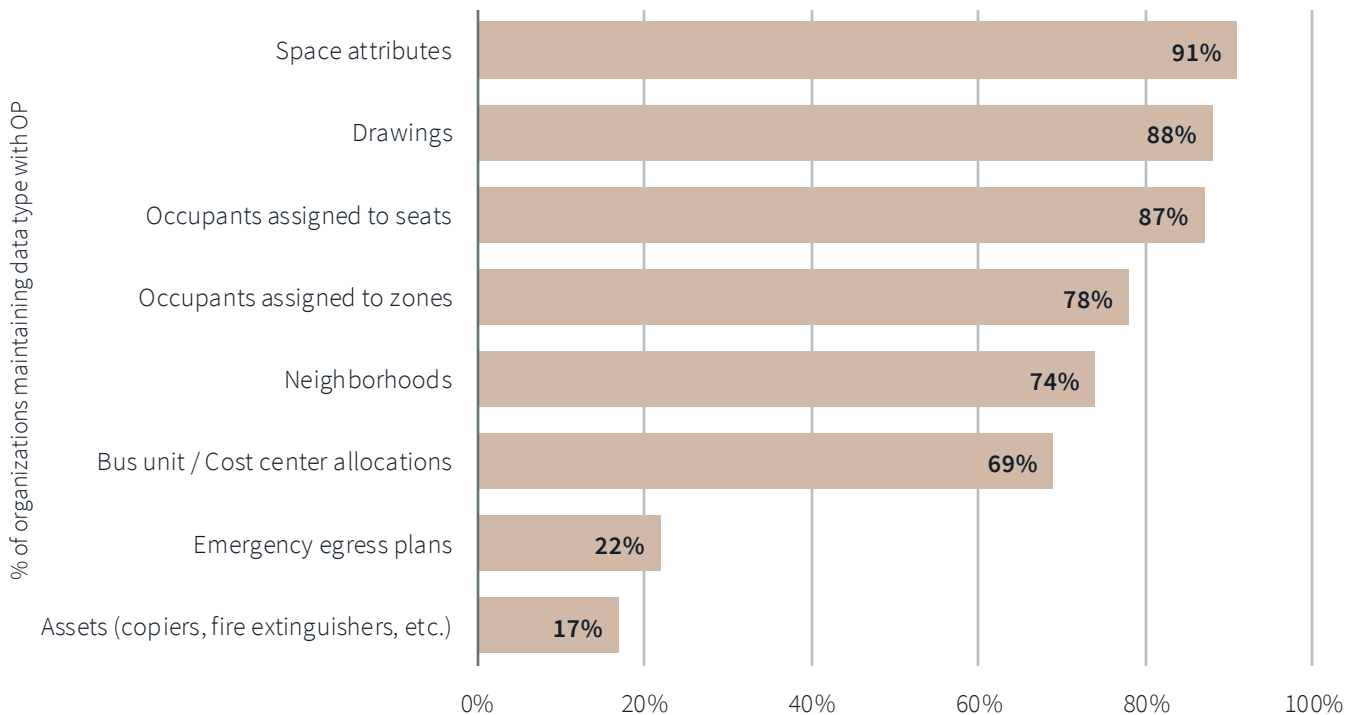
The breadth of data types maintained by occupancy teams and increasing digitization of building information can allow connected information to be integrated into visual dashboards, connecting utilization data with space attributes.

The continued cost efficiencies in sensor technology and developments in AI analytics will allow for real-time utilization data to connect to space data in the near future.



Figure 23.

Data type maintained by OP teams



Appendix



Methodology

We asked prominent corporate and commercial real estate leaders from around the world to answer roughly 100 detailed questions about how they use their space. The answers they shared are featured throughout this report, to provide valuable insights into workplace benchmarks and occupancy strategies.


This report is intended to provide guidance & inform decisions for occupancy planning and wider Corporate Real Estate strategies. For further detail and access to complete data sets, please reach out to our Occupancy Planning & Management teams in your region.


Responses

In 2024 we accumulated data from 84 organizations we support, across 15 industries. Each organization provided a separate response for each region they operate in, providing accurate insights into regional differences. This report considers the combination of account and region as a unique responses, providing a total of 168 responses to the survey.

JLL Work Dynamics research

The JLL Work Dynamics research covers broad topics on return to office, sustainability, and global leader surveys. Where relevant we have also drawn from wider JLL research to provide additional context. These are referenced through the report.

 Industry	Responses
Technology	28%
Financial Services	19%
Consumer Goods, Media & Entertainment	14%
Life Sciences	10%
Insurance	7%
Business Services	5%
Public Institutions	5%
Energy, Oil & Gas, Utilities	4%
Manufacturing & Automotive	4%
Other	4%

 Region	Responses
Asia Pacific	27%
Europe & Middle East	20%
Latin America	16%
North America	37%

Glossary

Benchmarking Metrics

Term	Definitions	Calculation (where applicable)
Occupancy rate	Occupancy Rate is the percentage of a site or location occupied at a given time.	Division of actual occupied space by the total available space, multiplied by 100. Typically used for locations with a high workstation assignment. The metric is displayed as the inverse of vacancy.
Vacancy	Ratio between used and unused spaces or seats and expressed in percentage points.	Two calculation methods dependent on modes of space assignment (allocation). - Method A. Typical for workplaces with desk assignments. Calculated as a ratio of total unassigned workpoints within a site or sq ft of office space / overall capacity or footprint of the space - Method B. Typical for mobility enabled workplaces. Calculated as a ratio of unoccupied / unused workstations / areas compared to the total number of available workstations or the workspace footprint
Utilization	Proportion of time that individual seats or spaces are occupied over a specific time.	Measurement of time spent (duration of stay) by an employee occupying premises divided by overall time available for occupancy. The specification or granularity of time dimension can vary and be defined by the platform, client, or account (i.e., midnight to midnight, 6 am to 6 pm) and is expressed as %.
Employee mobility	Employee Mobility is used to segment site user behavior based on the level of mobility within the workplace, typically categorized by percentages.	Spreads will vary based on client workplace programs and internal definitions and is based on number of days per week /month at a site of location.
Space function ratios	Ratio of space type categories to understand the attributes of space.	The ideal ratio is specific to an organization and depends on factors such as the nature of the work conducted, the composition of the workforce, and the organization's goals and culture.
Open positions	Number of seats available within a portfolio or office, available to assign	
Cost per seat	Operational costs proportional to number of seats in workplace	Operational costs for total building divided by the full capacity of the building.
Density	Measure of efficiency calculated by dividing office area by population or number of seats	RSF/RSM per seat: density metric determined by overall capacity RSF/RSM per person: density metric determined by overall population

Glossary

General Terms

Term	Definitions
Headcount	Headcount represents the total number of individuals assigned to a site or location, including locally based employees, contractors, partners, or interns.
Employee	An Employee is an individual accounted for in the client's Human Resources and/or Badge data.
Sharing Ratio	The Sharing Ratio refers to the proportion of the number of people per number of workstations.
Space Planning	Space planning refers to analyzing and optimizing the allocation and utilization of physical space within a building or facility through spatial techniques, including block or test fit plans. It involves strategically planning how space is divided and organized to meet an organization's or business's functional needs and operational requirements.
Occupancy Planning	Occupancy Planning refers to allocating the built environment to staff within an organization to manage the space effectively, ensuring users have an environment that supports their needs and the real estate team's goals. People and space data, such as the population and capacity information, inform Occupancy Planning and deliverables.
Space Allocation	Space Allocation is the day-to-day management of minor increases and decreases in population where space assignment is required but can be achieved without undertaking scenario plans.
Workplace Program	A Workplace Program is a high-level calculation showing the number, type, and size of functional spaces, including workstations, meeting and collaboration spaces, cafeterias, and the like, etc., and making allowances for circulation, reception/support, and critical services.

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Research at JLL

JLL's research team delivers intelligence, analysis and insight through market-leading reports and services that illuminate today's commercial real estate dynamics and identify tomorrow's challenges and opportunities. Our more than 550 global research professionals track and analyze economic and property trends and forecast future conditions in over 60 countries, producing unrivalled local and global perspectives. Our research and expertise, fueled by real-time information and innovative thinking around the world, creates a competitive advantage for our clients and drives successful strategies and optimal real estate decisions.

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