JLL | Achieve Ambitions

Occupancy Benchmarking

Occupancy Planning Annual Report

2017

Contents

Achieving occupancy, utilization and data ambitions

Message

We're thrilled to launch our 2017 Occupancy Planning Annual Report. Last year was another growth year for our Occupancy Planning practice. We continued to provide best-in-class occupancy planning services for our existing clients as well as bring on more than 100 occupancy planners, 30 new clients and an additional 150 million square feet under management globally this year.

This means we now have more than 90 Occupancy Planning clients, 550+ million square feet under management and 450+ planners globally – and counting! This growth continues to give us the scale to measure, collect and report on occupancy metrics, programs and the evolution of the practice as we enter the fourth Industrial Revolution around digitization. The critical data that we maintain on the behalf of our clients coupled with the digitization and automation of our occupancy metrics provides us invaluable insight on occupancy challenges and opportunities facing organizations around the world.

Based on how well-received our first Annual Report was, we structured this report to be an even-deeper reflection of trends in the world of space standards, occupancy and utilization of space and what our clients are doing to respond to those trends. We hope the materials in this report help you answer some of your toughest questions, such as:

- Do most companies charge back for space? If so, how often?
- Do most companies adhere to space standards?
- How many office and work station standards are normal?
- Do most of our clients have mobility programs?
- How do our clients determine participation in space and mobility programs?
- How do our clients track real time utilization?

We're on track to have another incredible year of growth, development and digitalization in the Occupancy Planning space. As our ambitions continue to grow, we hope this benchmarking report helps you achieve your occupancy ambitions – whatever they may be.

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Overview

highlights

Like anything else, real estate is all about balance. If you have too much space, you end up paying a lot of money for space that goes unused. And if you don't have enough space, you risk decreased employee morale and productivity.

This report outlines how much and what type of space companies around the world have, which may be helpful insight as you shape your future occupancy strategy and space needs.

We surveyed 81 companies and organizations globally, totaling 550 million square feet of space, and you may be surprised by the results.

Response by industry

5% Communications

12% Consumer products

1% Education

20% Financial services

3% Healthcare

20% Industrial

5% Pharmaceuticals

1% Restaurants

6% Professional services

32% Technology

3% Non-profit/ government

2% Utilities

Benchmarking and metrics

Definitions

- **Exterior Gross Square Footage (GSF)/Gross Square Meters** – The total square footage from the exterior of the building wall (includes wall thickness)
- **Interior Gross Square Footage (GSF)/Gross Square Meters** – The exterior GSF/GSM minus the exterior wall thickness
- **Rentable Square Footage (RSF)/Rentable Square Meters (RSM)** – 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 –** The quantity of people assigned to a seat or area
- **Vacancy –** Unit of capacity that has not been assigned
- **Vacancy Rate –** Percent of seats that are vacant compared to capacity
- **Density –** A measure of efficiency calculated by RSF or RSM divided by population or capacity to determine RSF or RSM
- **Utilization –** The amount of time that a space is occupied per person or RSF or RSM per seat

Occupancy metrics calculate how we measure your current or future real estate portfolio. These calculations measure efficiency and space usage, and are most impactful when benchmarked against others. This data can be used to set targets for future space needs that align with your company's goals.

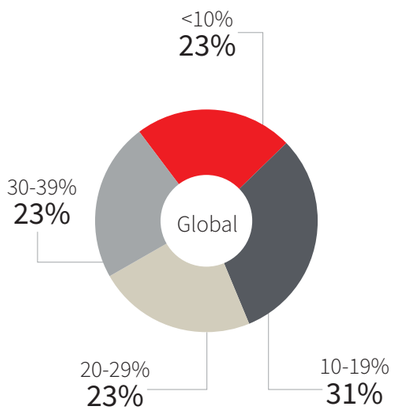
Findings

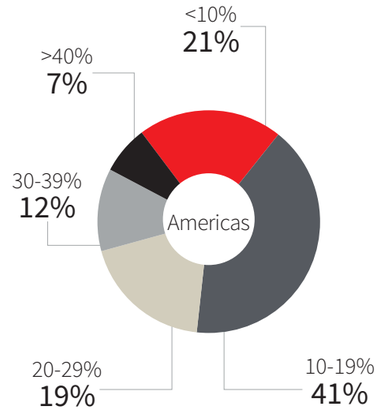
81%

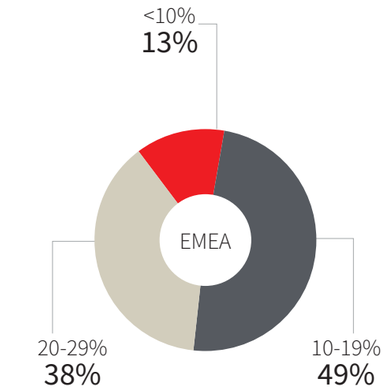
clients are interested in benchmarking their space use across all regions

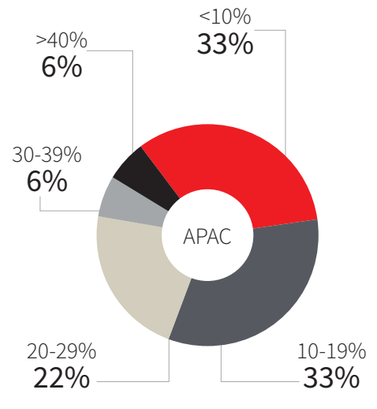
Occupancy metrics

Average vacancy (%)

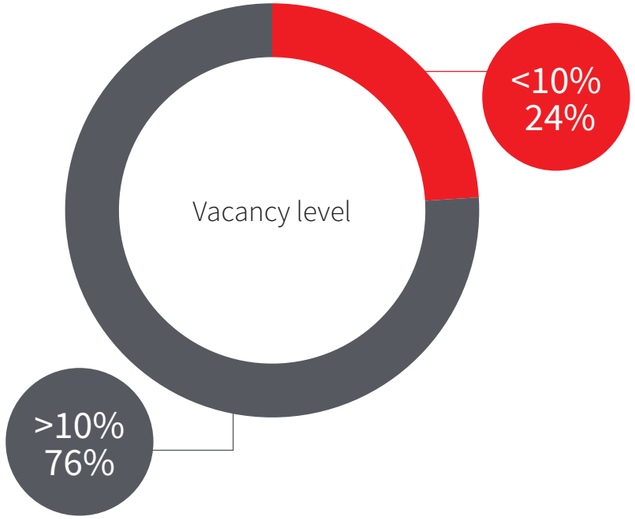




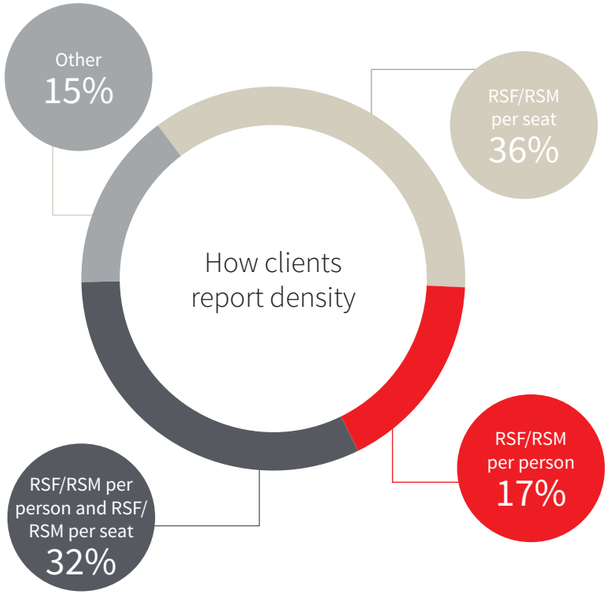




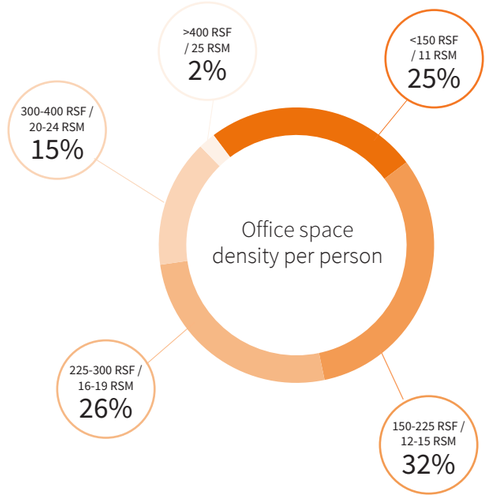
Clients with global, Americas-only and EMEA-only portfolios have an average vacancy level of **10-19%** while Asia Pacific-based clients have the lowest vacancy of less than **10%**. All EMEA-based clients have vacancy levels under **30%.**



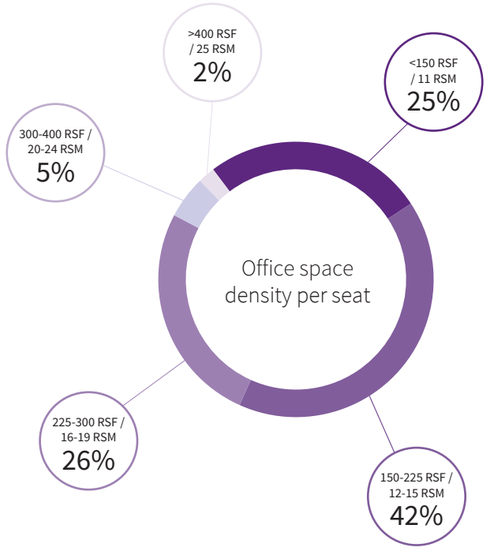
Only **24%** of clients have an average vacancy level below **10%** of their workstation capacity. And only **5%** of clients located in the Americas or Asia Pacific have more than **40%** of their workstations vacant, possibly due to company restructuring or M&A activity.



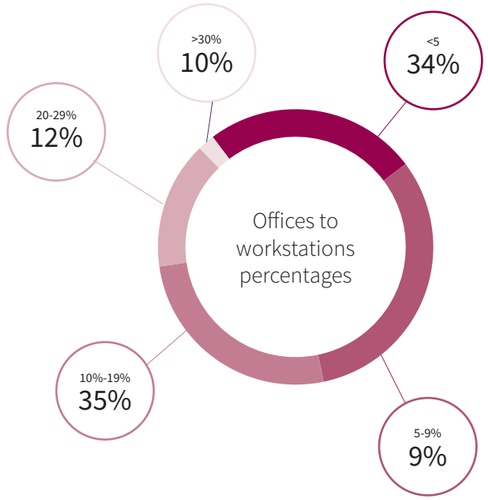
Most clients report density as RSF/RSM per seat **(36%)** or a combination of RSF/RSM per seat and RSF/RSM per person **(32%).** For Global and Americas-specific clients, RSF/RSM per seat is the preferred benchmark. In EMEA- and Asia Pacific-only clients, both RSM per person and per seat are used.



More than half of our clients' density is not higher than 150-225 RSF/12-15 RSM. However, **25%** fall under less than 150 RSF/11 RSM and **32%** have average densities of 150-225 RSF/12-15 RSM.



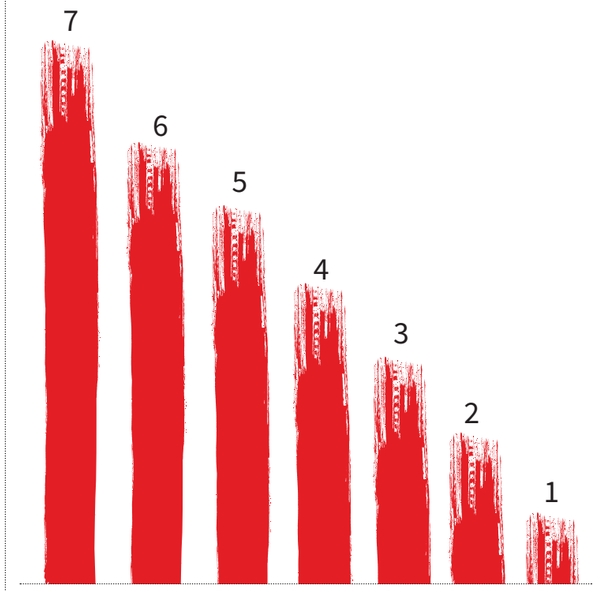
40% of clients have an average density between 150-225 RSF/12-15 RSM per seat. In all regions except Asia Pacific, density per seat is higher than density per person, which indicates higher desk sharing among mobile employees.

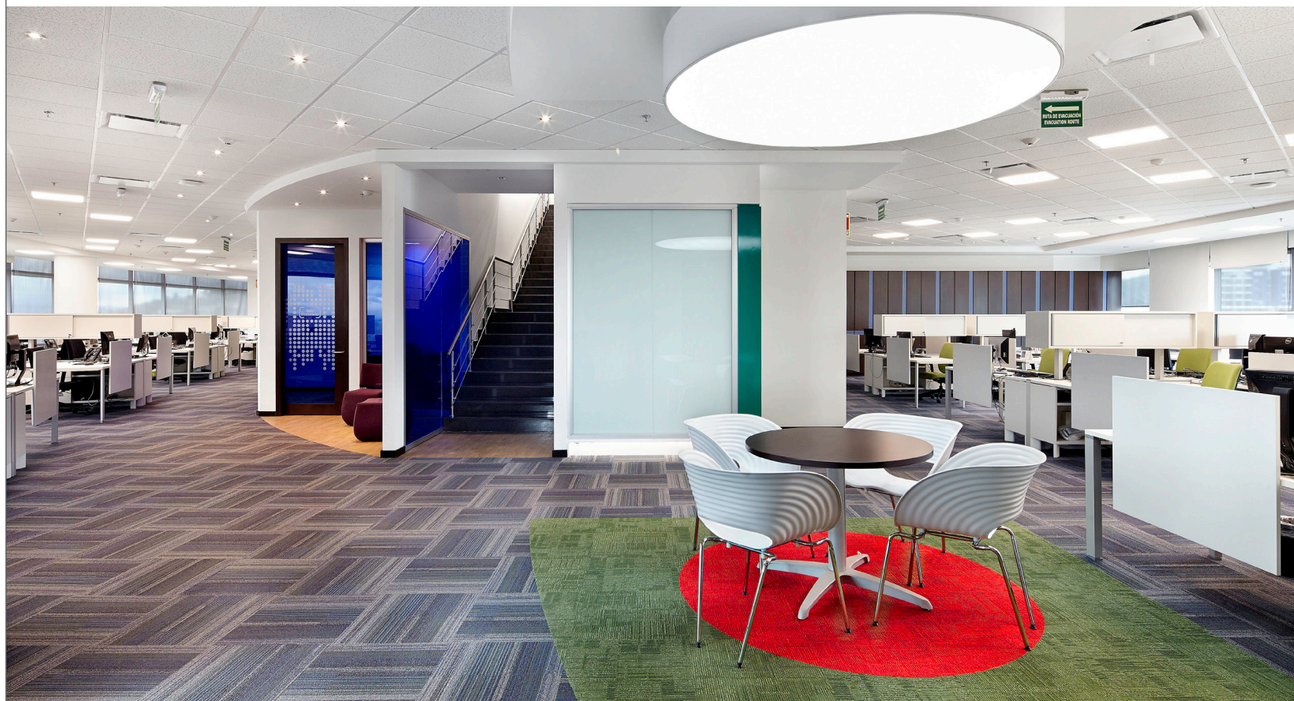


57% of clients have office-to-workstation ratios at **10%** and above. **35%** of clients occupy sites with **95%** share of workstations and 5% share of enclosed offices.

Over **60%** of clients in EMEA and Latin America prefer standard open offices and keep their office-to-workstation percentage below **5%.** Office space in the Americas has a higher proportion of offices to workstations – between **10-29%** in **55%** of companies. In the Americas and Asia Pacific, we see a percentage of **30%** for enclosed offices to workstations.

Most-relevant occupancy metrics





Utilization

Understanding how employees use their space is a top priority for real estate teams these days. Incorrect space need projections can have detrimental financial effects, while understanding space usage can result in efficiencies and productivity enhancements across the board. Companies can use several methods of tracking utilization to capture data and make meaningful decisions to right-size their portfolio.

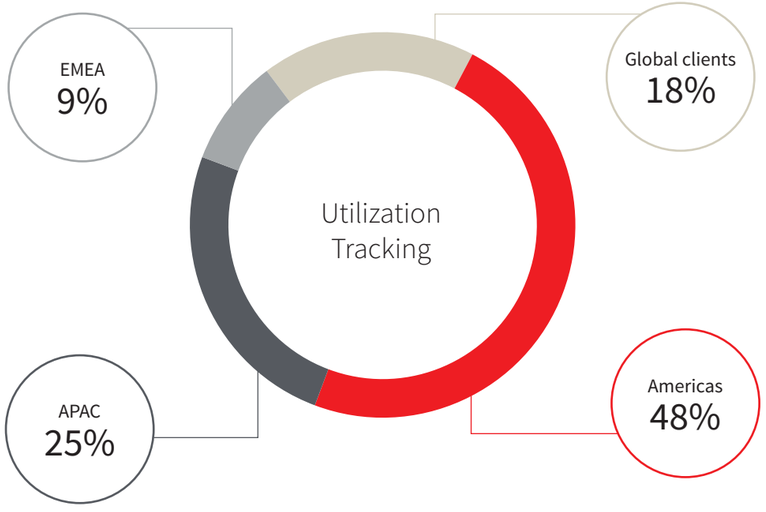
Definitions

Utilization: The amount of time that a space is occupied. This can be measured using a variety of high- and low-tech methods. Measuring utilization can include assigned (workstations/offices) and unassigned (huddles and conference rooms) spaces.

Utilization rate: The percentage of time a space is occupied.

57%

of clients track utilization



Utilization measurement by industry

50% Communications

60% Consumer products

0% Education

75% Financial services

100% Healthcare

33% Industrial

100% Insurance

100% Non-profit/ Public sector

25% Pharmaceuticals

25% Professional services

0% Restaurants

54% Technology

50% Utilities

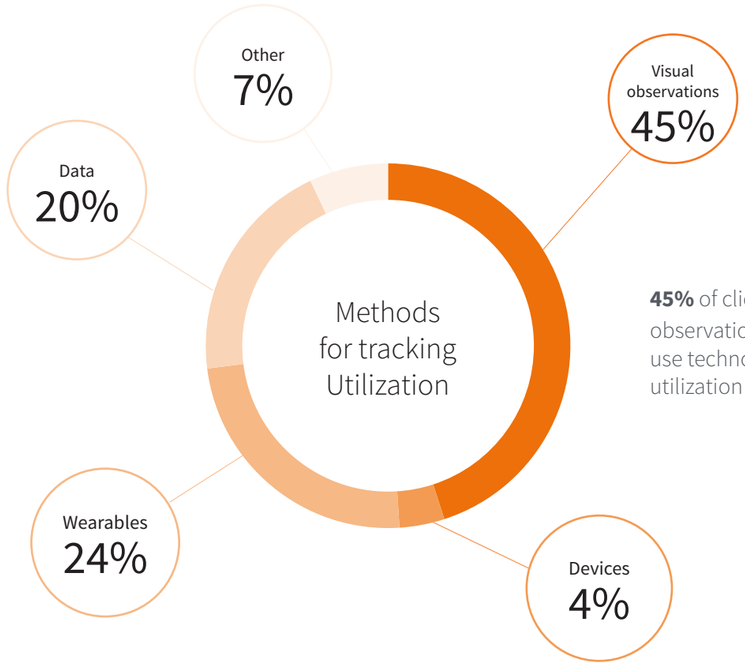
Utilization tracking methods

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

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

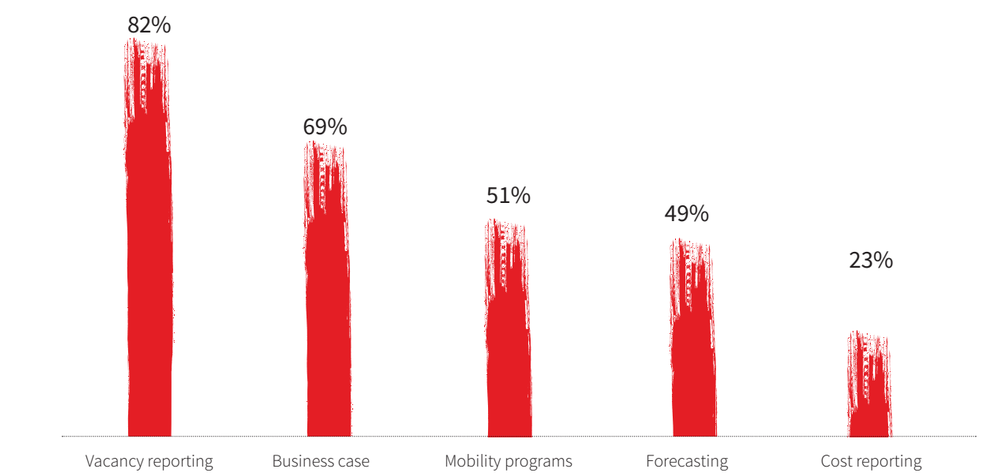
Utilization Tracking - Wearables: Tracking utilization by using information from badge swipe data, applications that are downloaded on a phone or monitors that track personal interactions.

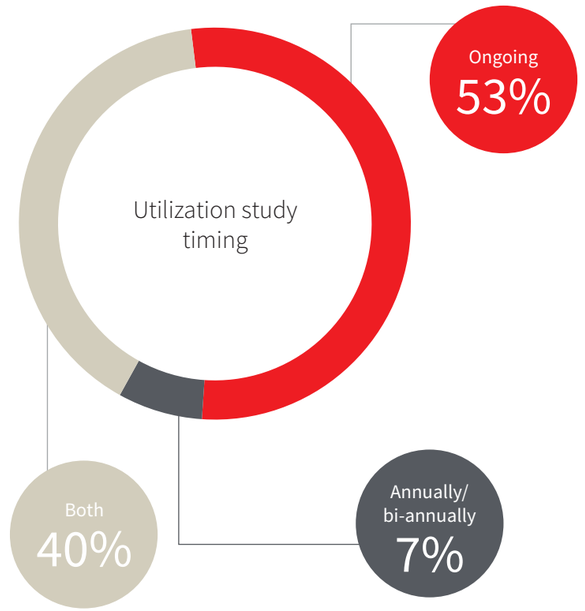
Utilization Tracking - Data: Tracking utilization through network activity (both wired and wireless) and presence monitoring such as instant messaging.



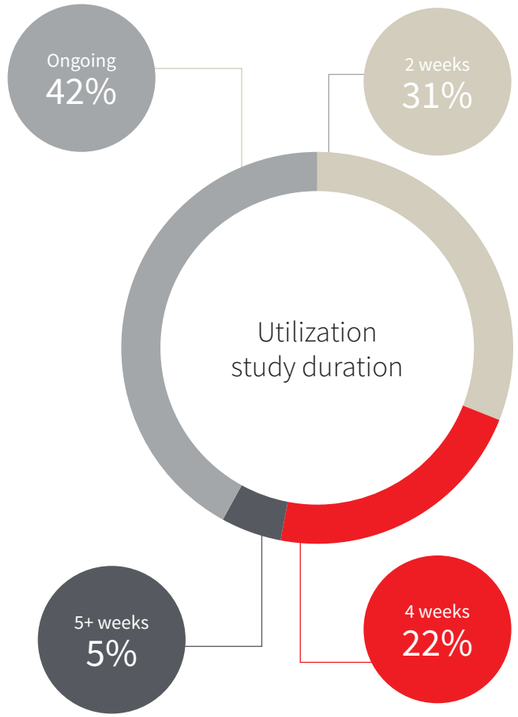
45% of clients use manual visual observation methods, while **55%** use technological methods to obtain utilization data.

Reason for tracking utilization





Utilization is a key metric in defining a workplace strategy, and **53%** of clients that perform utilization studies do so as part of a larger project.



Globally, **42%** of clients track utilization on an ongoing basis.

Utilization reviews

Site

93%

Line of business

51%

Job function

20%

Other

9%

Utilization tracking

Track utilization of meeting space

51%

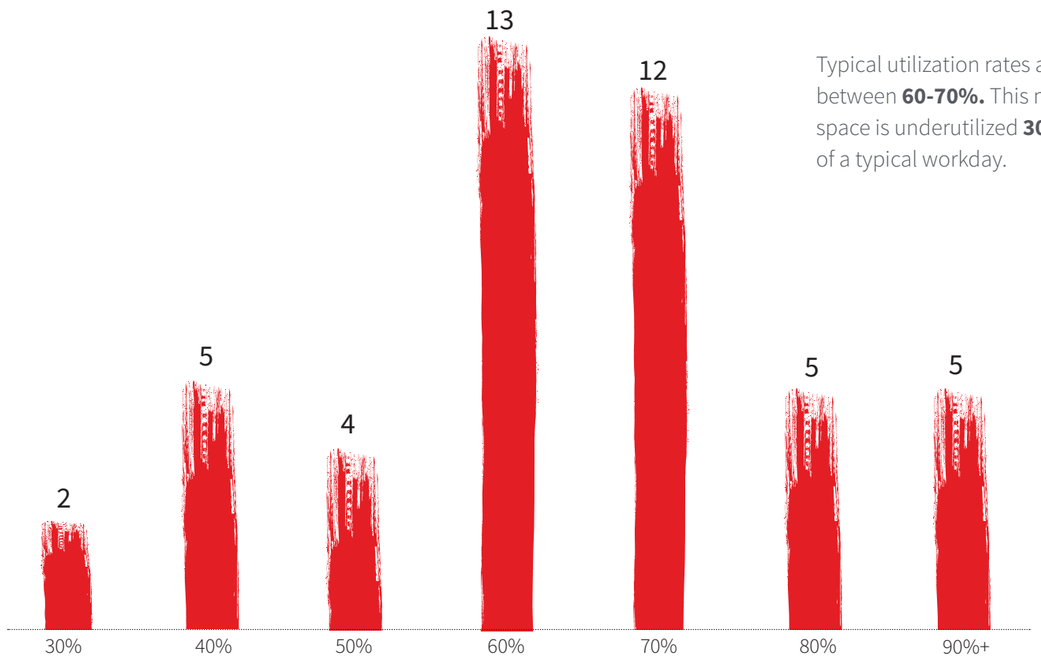
Of the **57%** of clients that track utilization globally, nearly half track the utilization of meeting and open collaboration space.

Track utilization of technical space

67%

Globally only **33%** of clients that track utilization track the utilization of technical (non-office) space.

Office space utilization



Typical utilization rates are between **60-70%.** This means space is underutilized **30-40%** of a typical workday.

Utilization by industry

70-89%
Communications

60-69%
Consumer Products

30-90%
Financial Services

60-69%
Healthcare

50-79%
Industrial

80-89%
Insurance

80-90%
Non-profit/Public Sector

50-59%
Pharmaceuticals

70-79%
Professional Services

30-90%
Technology

80-89%
Utilities

Case study

Industry: Professional Services
Geography: United States
Square feet/meters: 2.4 million square feet

Situation
This organization wanted to understand how well its renovated workplace was functioning by specifically looking at how the space was being used throughout the day.

The findings would help make design adjustments for future renovation plans and determine the correct mix of space and furniture to support the various work activities.

Results
Through the use of in-depth utilization studies, the client learned that most employees were away from their workspaces more than 50% of the day. In addition, the study showed high usage of kitchenette space and lower usage of community and meeting spaces.

The client used this valuable intel to reevaluate their office space design and future renovation plans.

Mobility

The office environment is changing. Companies are facing continued pressure to deliver an innovative and collaborative workplace while increasing productivity and reducing real estate costs. Mobility programs allow companies to offer a more flexible workplace and provide the necessary tools to foster collaboration and innovation by creating a task-based work environment with unassigned seating.

Mobility programs are used for two main reasons:

- Create a collaborative and innovative workplace for their employees
- Reduce square feet/square meters in a portfolio

Definitions

Mobility program: A program in which the work environment is modified to provide more collaborative or specialty space and employee seating is unassigned.

Neighborhood: A designated area of workstations within a mobile workplace where a specific group of employees sit. Neighborhoods can be classified by job function, project team, department, geography, etc.

Open collaboration: A space where employees meet that is exposed to the open office environment. Open collaboration spaces have various furniture configurations including, but not limited to, soft seating (couches & chairs), conference tables and high-top tables.

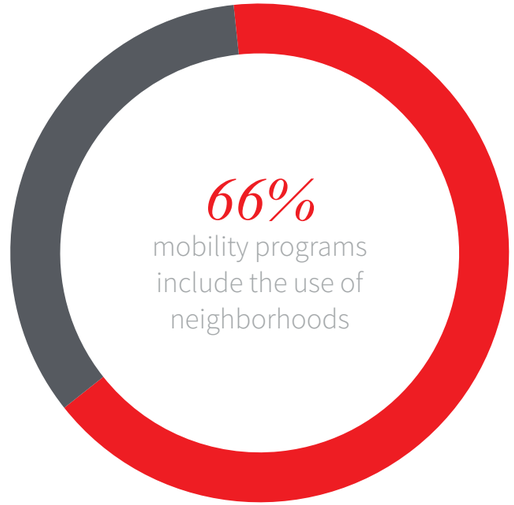
Mobility target: The metric used to benchmark the performance of a mobility program, typically shown as a ratio of seats to population. For example, the number of employees in a space or the total square footage/meters dedicated to the mobility program can be used to determine the mobility target.

Findings

41%

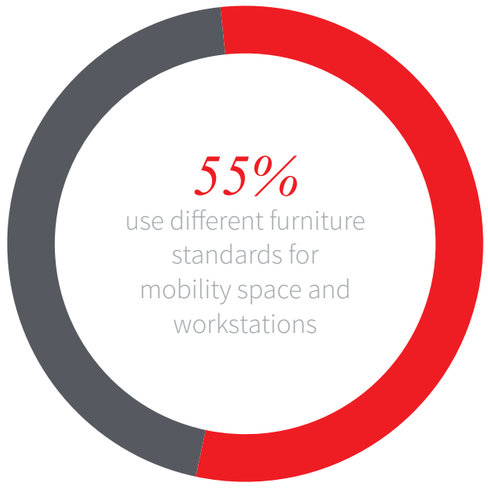
of clients have a mobility program.

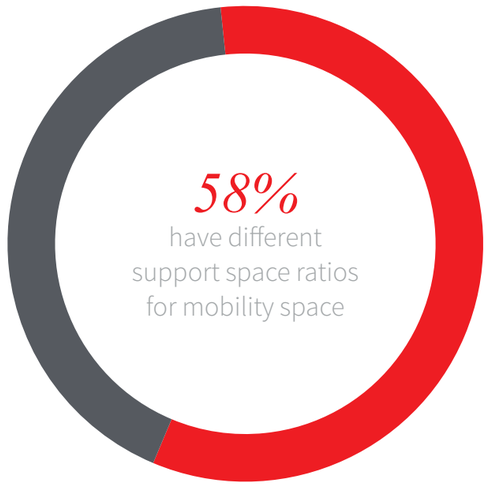
Although Technology and Financial Services companies in Asia Pacific and the Americas are leading the way in flexible and mobile work environments, we are seeing mobility programs being adopted in nearly every industry across all regions.



Neighborhoods are used by **66%** of clients in all regions for the following reasons:

- Identify business unit ownership of space
- Define available space for mobility workers
- Capture headcount in a CAFM/IWMS system





Mobility programs by industry

50% Communications

30% Consumer products

100% Education

50% Financial services

50% Healthcare

25% Industrial

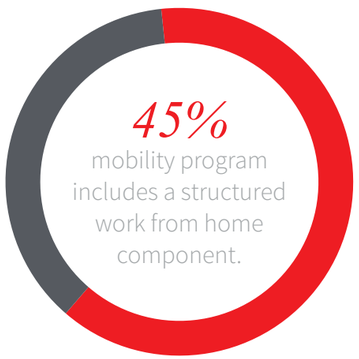
75% Pharmaceuticals

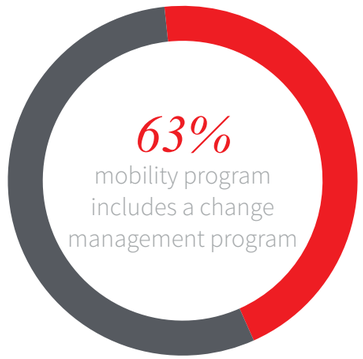
75% Professional services

100% Restaurants

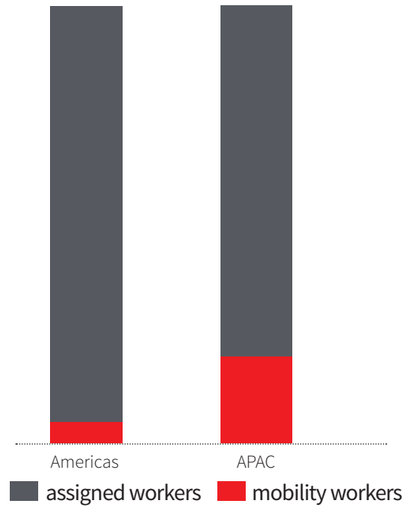
31% Technology

50% Utilities





For many companies, their employees are already working in more flexible ways. Although some companies offer work from home options, only **45%** of clients have a mobility program that includes a structured work from home component. However, **63%** of clients with mobility programs have a change management component.



Although there are more clients in the Americas with a mobility program, mobility workers typically only make up less than **5%** of the total headcount. For most of the clients in Asia Pacific that have a mobility program, mobility workers make up more than **20%** of their total headcount. Of the clients that have a mobility program, **70%** provided mobility workers with a locker to store their personal belongings. Mobility workers may also receive a lateral and pedestal file.

There are a variety of criteria used to determine employee eligibility for a mobility program. The top three are:

Job function

Manager discretion

Utilization reporting

Conclusion

Companies are reinventing the work environment by uncoupling work from only a desk or conference room. The more flexible mobile environments are empowering employees to have a choice in where and how they work. This year, the Financial Services and Technology companies in North America and Asia Pacific are leading the way for mobility. However, we are seeing mobility being adopted globally across most industries. If you are considering implementing a mobility program, it's critical to establish a change management component and have clearly defined goals at the onset of the program.

Case study

Industry: Consumer Goods
Geography: Canada
Square feet/meters: 14.6M square meters

Situation
The organization planned to reduce its office footprint in its general office leased building. They planned to reduce their occupancy from eight floors to three floors by implementing a Workplace Strategy and Change Management program.

Complexities
Employee Engagement was an integral part and major contributor to the success of the mobility program. Understanding the needs and goals of both leadership and the end-user allowed the account team to design and develop a workplace where its employees could thrive. With this knowledge the account team was also able to help define the needed change management for the organization.

Results
Reduction of over 9,000 RSM of leased space, saving $3.4 million in real estate expenses.

Space eligibility and function types

Space

Space eligibility
is criteria used by companies to establish and implement efficient and equitable space use standards. This allows specific workspace to be assigned and allocated to the appropriate staff. For example, all vice presidents and above receive a standard-sized office.

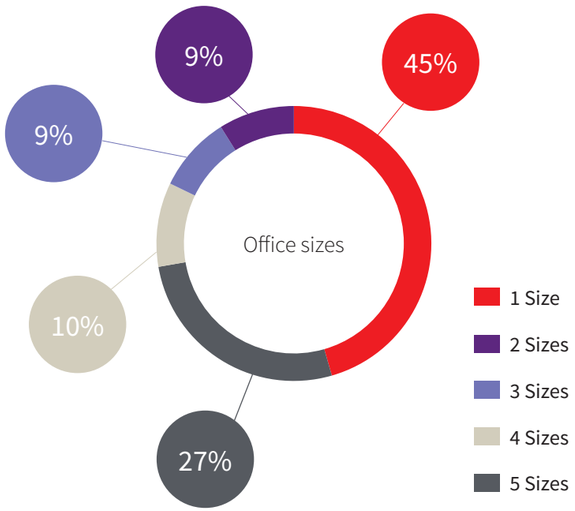
Space functions
are the general use for the space and the parent category for the space type. They typically include values such as workstation, amenity, conference, food service, etc.

Space type standards
are more detailed categories under space functions. They typically include values such as bench seat, standard workstation, video conference, team room and pantry.

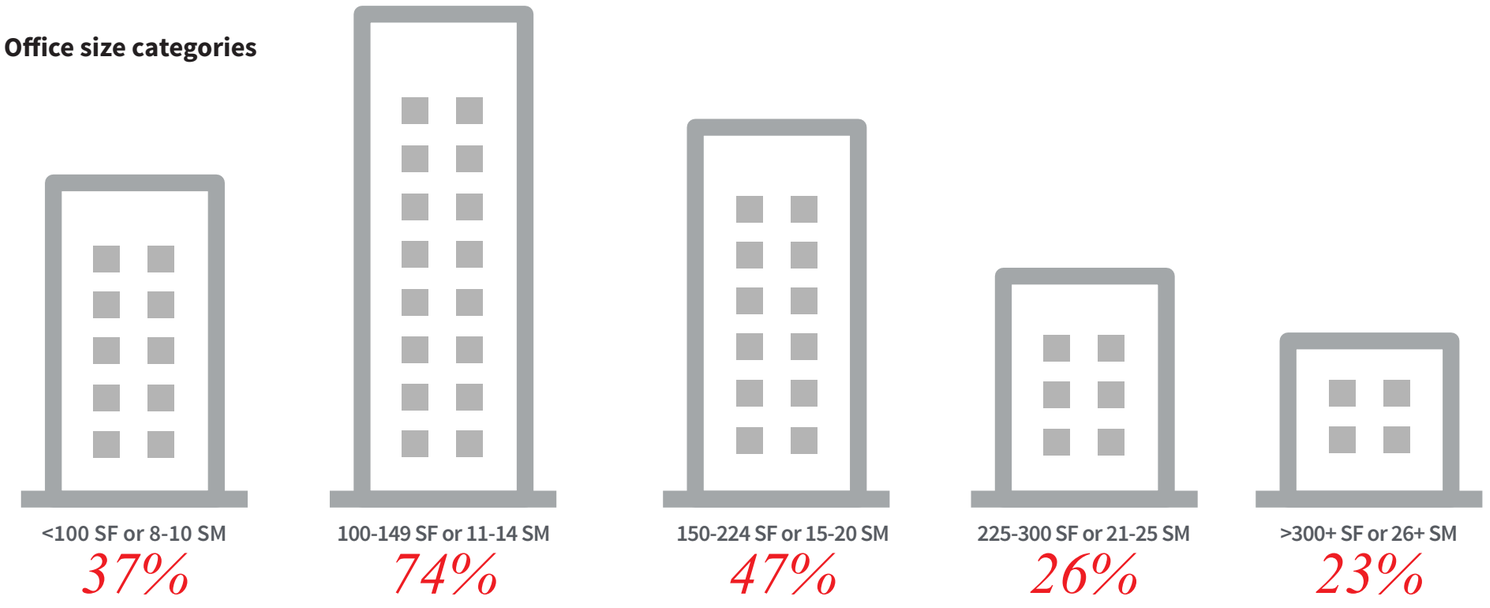
Space eligibility criteria

Globally, **69%** of clients have space eligibility criteria. We found very little differentiation between industries on the likelihood of having space eligibility criteria.

Standard office size quantities

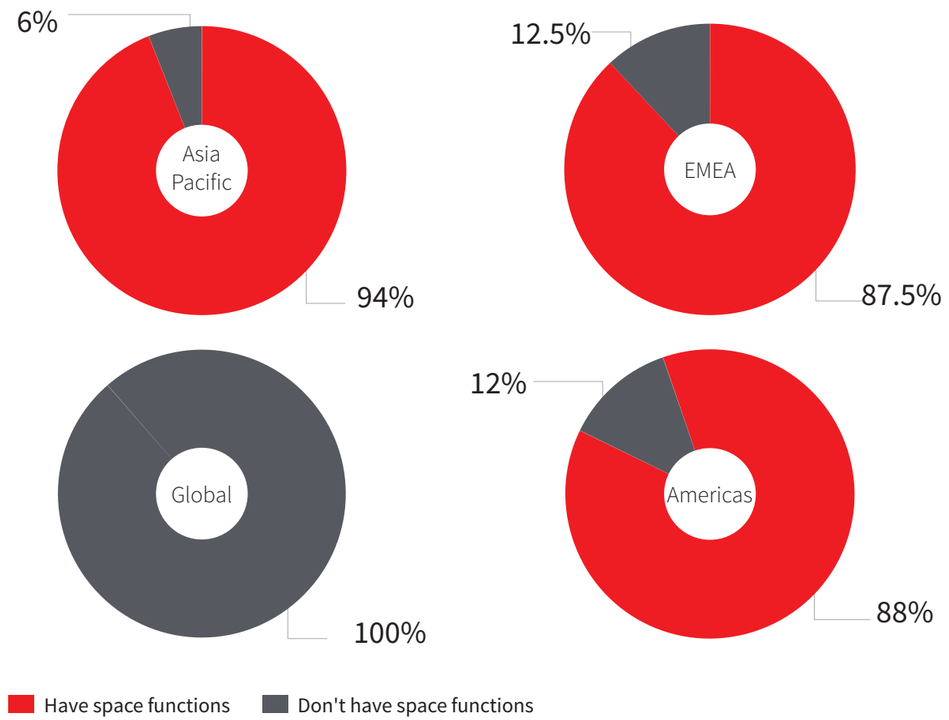


Office size categories

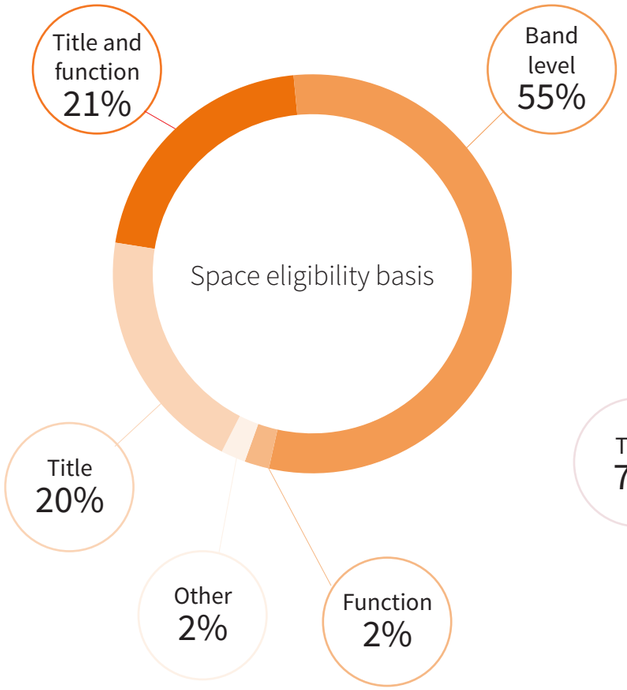


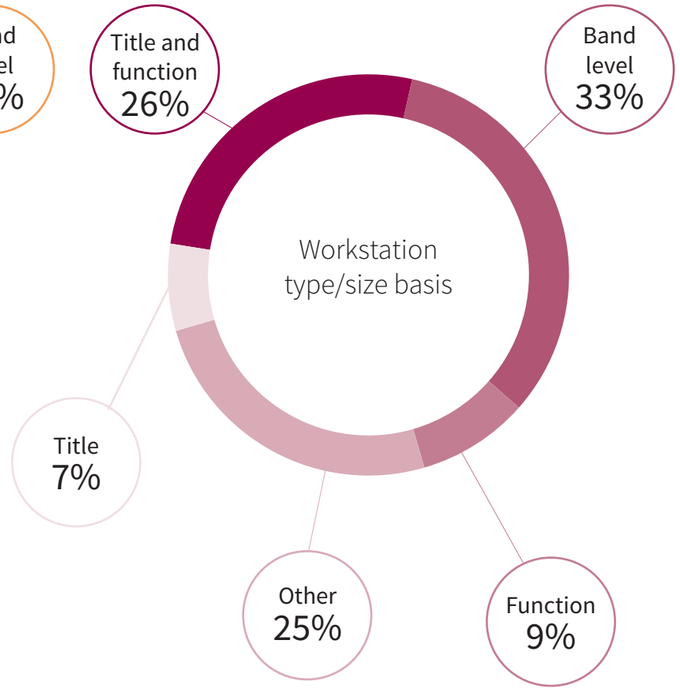
Office sizes ranging from **100-149SF or 11-14SM** are the most common.

Standards for space functions and/or space types

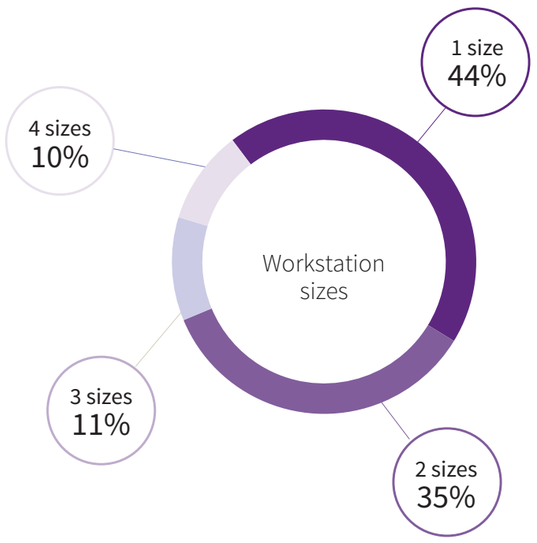


Globally, all clients have defined standards for space functions and/or space types. This includes criteria that defines general categories as well as specific uses. We also found very little differentiation between industries on the likelihood of having space eligibility criteria.



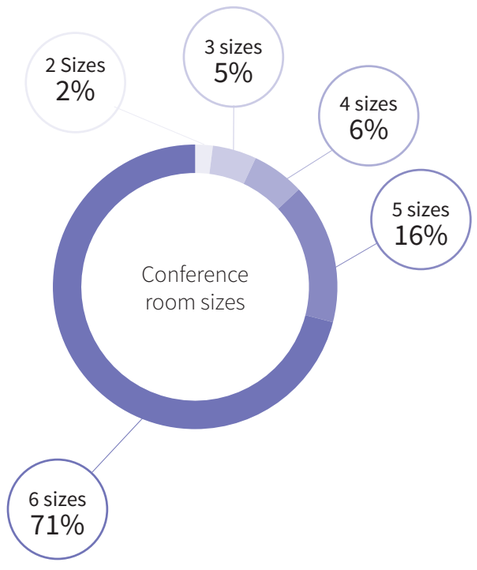


Standard workstation sizes



Meeting space

The majority of clients (71%) have six sizes of conference rooms.



The majority of clients have a standard workstation size of **35-49SF**. Across the regions, clients in Asia Pacific have the smallest workstations on average (less than 35 SF) while clients in the Americas have the largest spread and quantity of workstation types, varying from less than **35 SF** to more than **65SF**.

	<35 SF or <3.9 SM	35-49 SF or 4-4.9 SM	50-65 SF or 5-6 SM	>65 SF or >6 SM
Asia Pacific	13	9	3	3
EMEA	6	4	1	2
Americas	18	32	19	16
Global	7	9	5	4

Almost all of our clients **(91%)** have visitor drop-in space such as offices, workstations or bench seating. The majority of drop-in spaces are workstations and bench seating.

Technology in the workplace continues to be a priority. In fact, 97% of clients use collaboration technology these days. Of those clients:

97%
use video conferencing in enclosed rooms

86%
use desktop video conferencing capabilities (Skype or similar tools)

54%
use video in open, informal meeting spaces

41%
use other collaboration technology

Demand forecast planning

Moving from tactical support to strategic partner

Have you ever wanted a crystal ball to tell you how much space you'll need in the future? The answer may be more pragmatic than you think. Demand planning can help you answer some of those critical real estate questions:

- Is our vacancy level too high?
- What is the cost of excess vacancy?
- Is there a better way to support the business?
- How should we deal with the ebb & flow of vacancy?

Definition

Demand planning aligns real estate needs with your organization's growth. This process collects staffing and support space details to forecast space demand. Occupancy planning then aligns these details with space standards and pairs it with portfolio supply to develop solutions that match your business strategy.

Effective demand planning aligns revenue forecasts with real estate inventory – all with the goal of minimizing the gap between space supply and demand. Incorporating both historical occupancy data and current state data creates fact-based strategies to guide your future real estate needs.

Scenarios can be developed based on your goals. Want to know if you should stay and renew or stay and reduce your space/densify or stay and expand your space? Models for each scenario are built so you can make the most informed decisions about your space. Also, move scenarios can be created with fact-based sizing models. Combining scenario plans, including future space requirements with transactions, gives you leverage to get the best price on your space.

Things to know

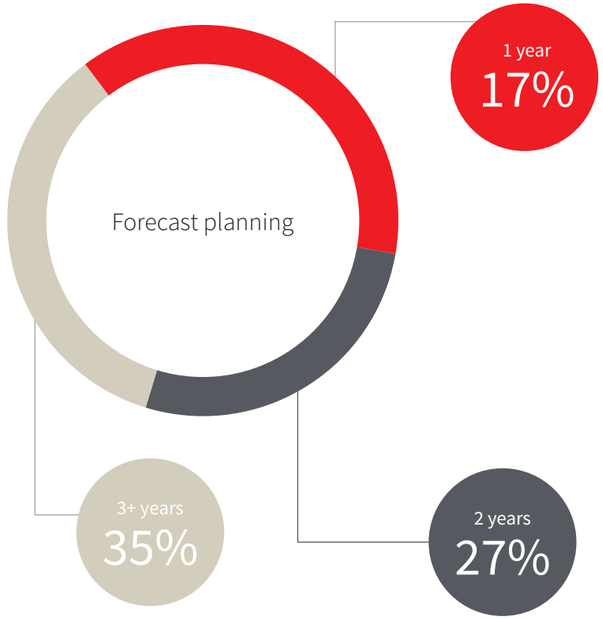
- Demand planning requires coordination between your company's leadership, HR, finance and real estate teams.
- Typical reporting includes the current state of seat occupancy and vacancy, as well as business unit growth projections. It also includes historical trends, which provide insight into future state needs.
- A cadence is typically established for updates and strategy discussions, including a breakdown of planning projects. Long-term business needs, goals and contract wins are also tied to this planning.

57%

Global clients gather forecast data

More than 50% of clients in the following industries gather forecast data:

- **Communication**
- **Consumer products**
- **Healthcare**
- **Insurance and finance**
- **Professional services**
- **Public sector**
- **Technology**



Conclusion

Demand planning helps support long-term business goals. The result is an optimized portfolio that can respond to changing business needs and priorities. An added benefit is the real estate team operates as a proactive, strategic partner, rather than a reactive team.

Case study

Industry: Financial Services
Geography: United States
Portfolio Size: 1.5 million square feet

Situation

A client required a long term, strategic real estate plan to accommodate business expansion and forecasted growth. On top of that, the company planned to implement new branding and space standards, including smaller workstations and increased number of collaborative areas.

Complexities

There was a need for a phased densification of the existing space with minimal disruption to the business. Due to the forecasted growth, temporary space wasn't available. In addition, this suburban location required a branding refresh to support employee retention and talent to the suburban site.

Outcome

By setting clear goals and providing an effective delivery road map, we aligned with the client's goals and provided a successful, long term real estate plan. **The organization increased capacity by 160 seats while reducing square footage per person, saving $70,000 in rent and $280,000 in projected expenses**.

Cost Savings/Avoidance

Definition

Cost Savings (CS) reduce or eliminate money currently planned 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 no longer need to be spent. Examples include: not having to establish a new site, not having to expand a site and sending staff to work at home status.

These are typically measured per seat, which is derived from site seat density (site lease RSF/site seat RSF).

Things to know

- CS/CA activities are powerful data points to help you identify and pursue opportunities of real savings.
- CS/CA can be achieved through one-time events as well as proactive and continuous strategic planning.
- CS/CA tracking documents continually captures and monitors site opportunities. Often this optimization comes in the form of vacancy reductions.
- The CS/CA tracking tool provides a continuous flow of portfolio life-cycle information.

Findings

Eight clients currently engage in proactive strategic planning that is measured in cost savings and cost avoidances. These eight clients recorded a total of 55 projects, 54 of which are taking place in the Americas.

The savings realized by these eight clients is substantial.

Financial results

Cost Savings

$42,367,912

Cost Avoidance

$7,556,534

Portfolio reduction

1,337,664 RSF

37%

of the total RSF of those projects are completed and accepted, which equates to 3.3% of the clients' entire real estate portfolio

Seat capacity reduction

6,758 seats

37% of the total vacancy for the projects

Conclusion

Creative, informed planning coupled with the discipline to capture and track opportunities can have a profound financial impact. For example, we've been capturing CS/CA since 2010 for a client and found more than $150 million in cost savings/avoidance. Even early on, when a planning project is starting out, tracking potential savings, modeling various scenarios is powerful. Engaging the transactions team early provides a strong negotiating position. This way, strategic planning and decisions are made well in advance of a lease notice or lease expiration date. In addition, the planning schedule builds in the time necessary for the transactions team to be engaged, brought up to speed with the lease strategy and allowed the time to engage the current landlord, or go to market for a full "move" vs "stay" analysis. This puts you in the driver's seat knowing exactly what your landlord wants and can do.

Case study

Industry: Pharmaceutical/life sciences
Geography: United States
Portfolio Size: 32 million square feet

Situation
A client required a long term, strategic real estate plan to accommodate business expansion and forecasted growth. On top of that, the company planned to implement new branding and space standards, including smaller workstations and increased number of collaborative areas.

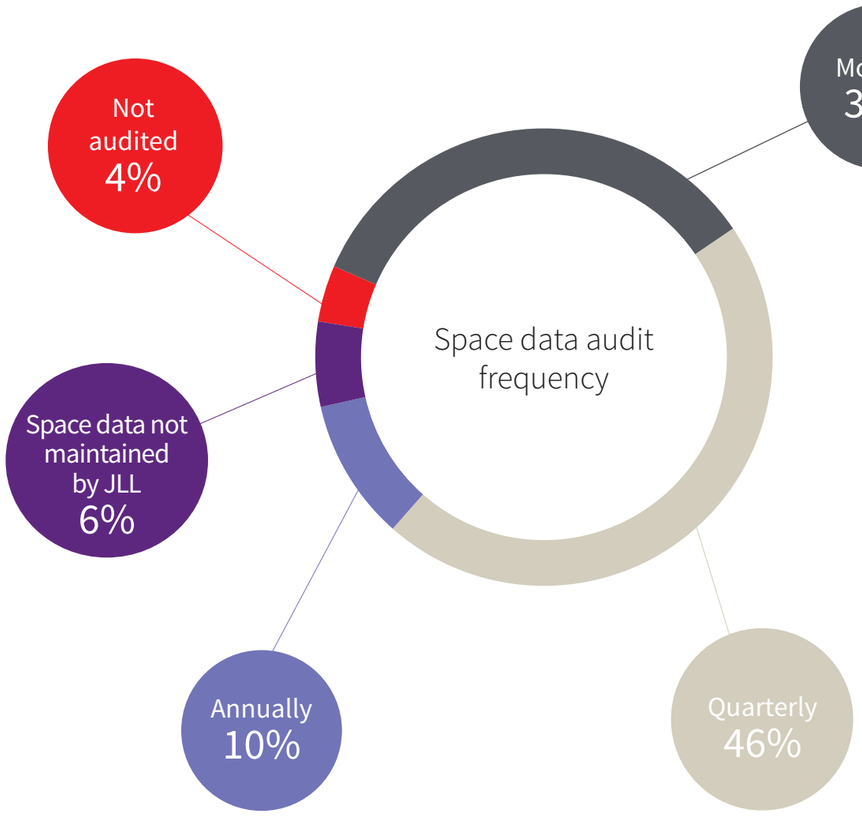
Complexities
Over the years, numerous site practices contributed to an inefficient campus footprint. On top of that, the company was facing aging infrastructure without a plan for outlining long-term capital needs.

Results
Working closely with client site leadership, JLL's Occupancy Planning team created a comprehensive proactive "living" plan that led to campus operations optimization, increased flexibility and developed divisional synergies. The living master plan established a strategic roadmap which lead to more than **$16 million in cost savings and $42 million in cost avoidance** through operating expenses, depreciation and taxes. **In addition, future cost savings are estimated at $16-$18 million.**

Space data accuracy

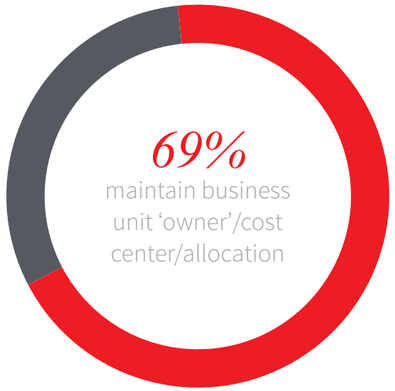
Definitions
Space data accuracy measures how precisely drawings and data represent the built and occupied environment. These measures apply to both graphical representations via floor plans as well as space function, space type, occupancy, cost centers and usage. High data accuracy is critical to making business decisions, so a rigorous process for gathering and maintaining this data is key.

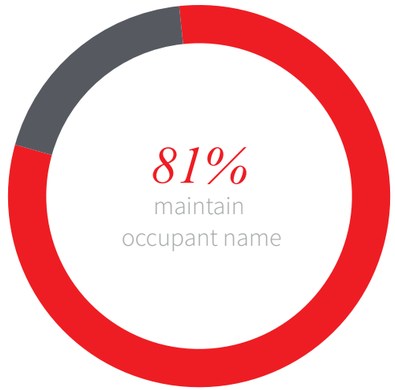
94% of clients use us to maintain space data. The other 6% of clients maintain space data themselves.

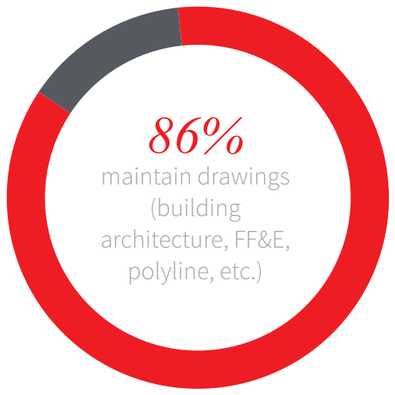


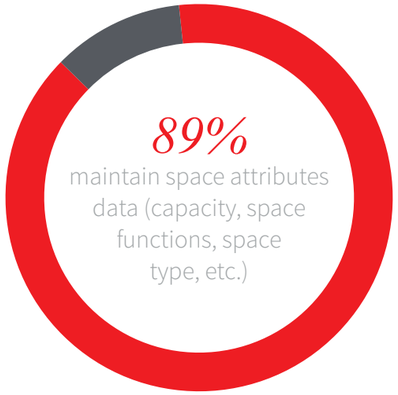
Nearly half **(46%)** of clients audit space data accuracy quarterly

While specific data points an organization gathers depends on its business priorities, data collected generally falls into the following categories:









Integrating multiple systems into a standard method ensures data is mapped across applications, creating more insight than siloed data platforms. Typical data integrations include personnel information, organization structures, portfolio locations and lease data.

80%

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

48%

of our clients feed information from their CAFM/IWMS system such as seat location back to their corporate system.

Space allocations and chargebacks

Definitions

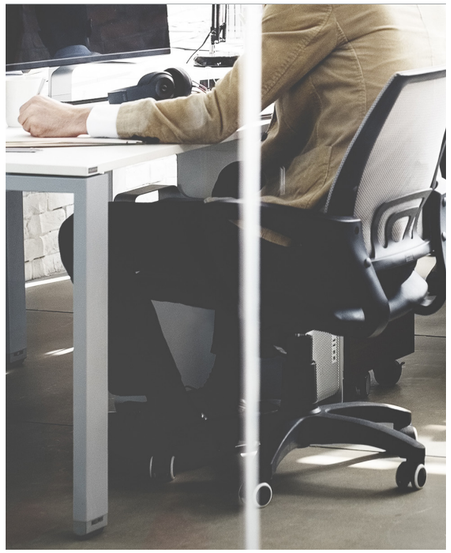
Space allocations: The amount of real estate assigned to each business unit. The apportioned space is valuable insight for operations professionals and forecasting demand. Sometimes, space allocation data provides the business case to implement a space chargeback program.

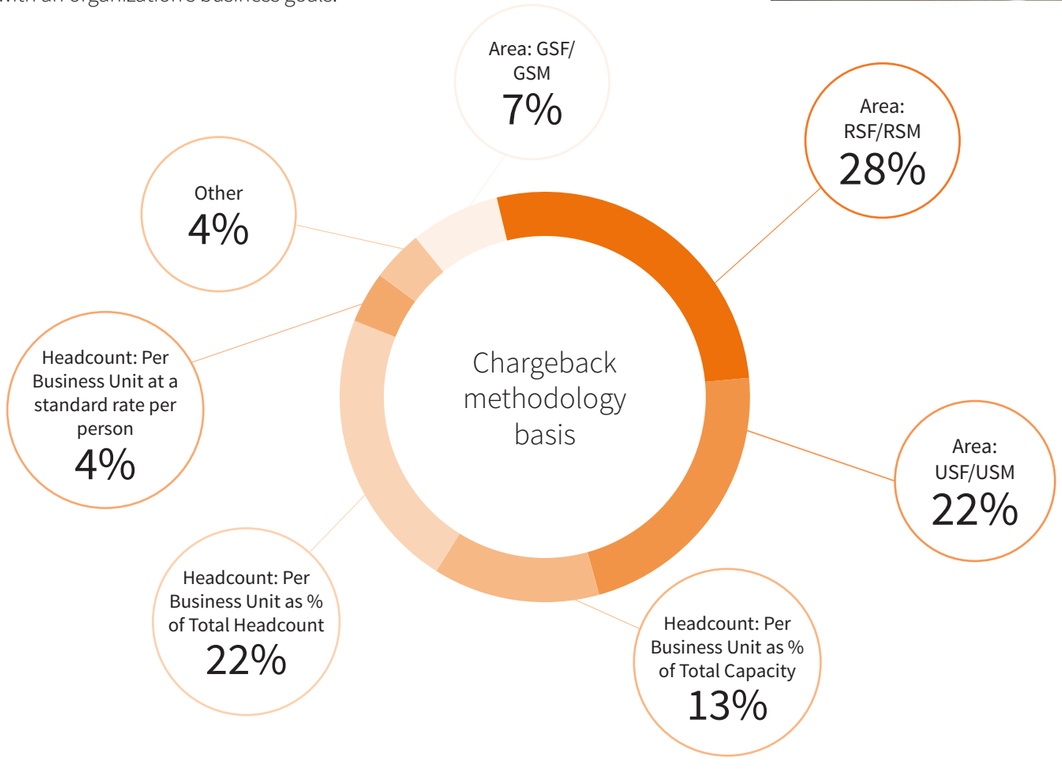
Space chargeback: A program to identify, communicate and obtain reimbursement for real estate costs from various business units. The goal of a space chargeback program is to drive accountability for space use and align with an organization's business goals.

Findings

56% clients' chargeback business units for space across all regions. The Americas and Asia Pacific clients chargeback for space slightly higher than global organizations and EMEA-only clients.

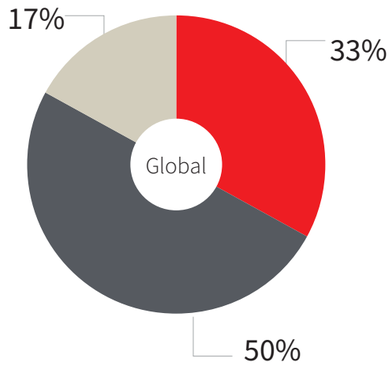
There isn't a single, consistent way client's chargeback space. Although charging back space by RSF/RSM is the most-popular way, charging back space by percent of total headcount is a close second.

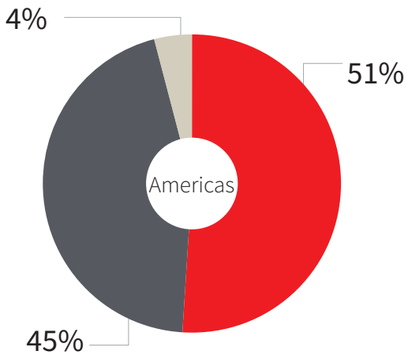


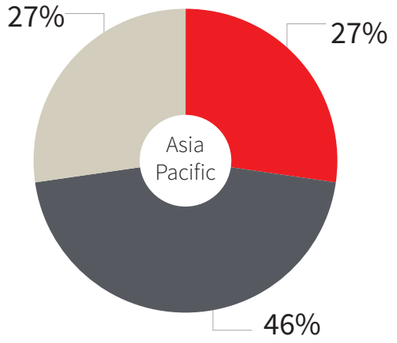


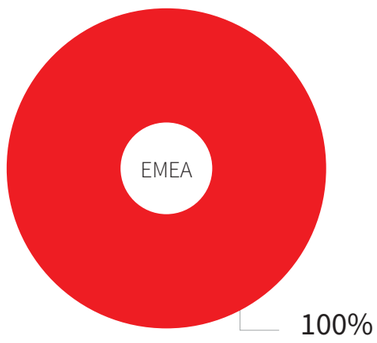
Chargeback methodology frequency

42% of clients charge back their business units on a monthly basis



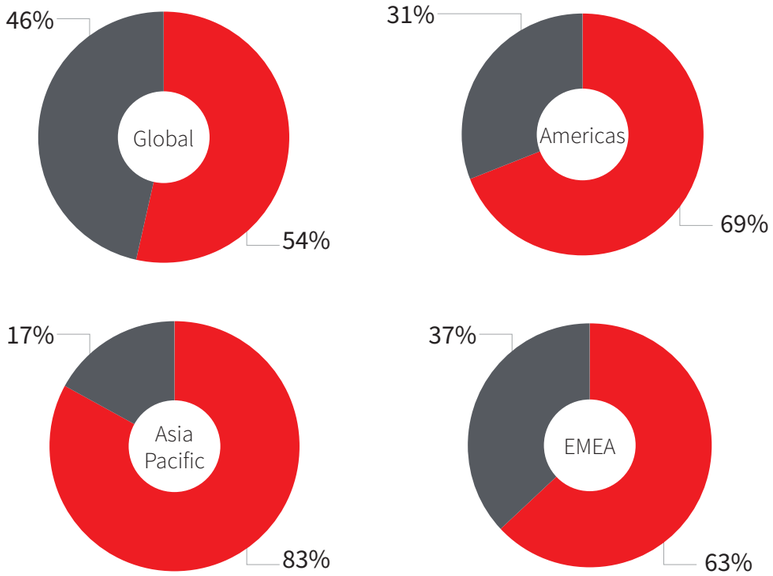






Annually Monthly Quarterly

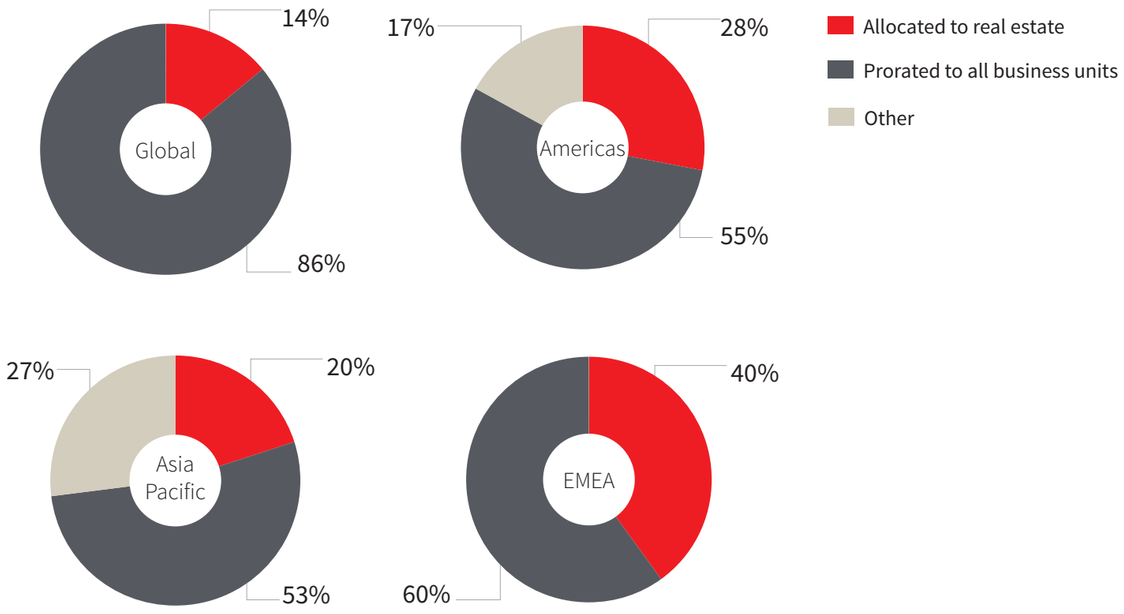
Space allocations



69% of clients allocate space to different business units across all regions. Asia Pacific has the highest percentage of clients **(83%)** that allocate space to different business units.

- Allocate space to different business units
- Don't allocate space to different business units

Common space allocations



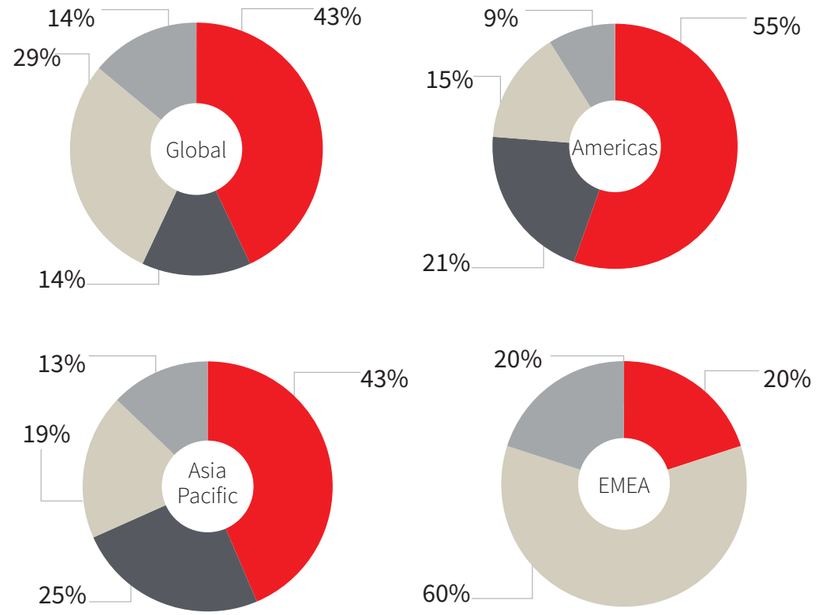
- Allocated to real estate
- Prorated to all business units
- Other

Conference room allocations

52% of clients allocate shared space by prorating to all business units.

- Prorated to all business units
- Allocated to real estate
- Allocated to business unit
- Other

Vacant space allocations

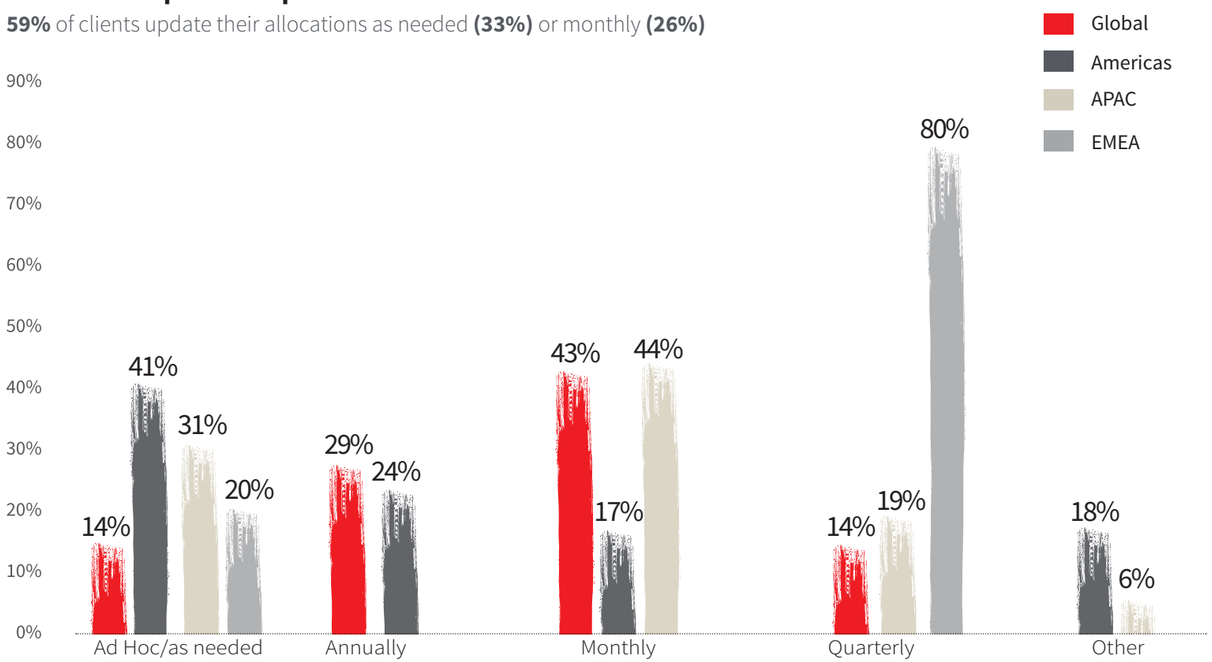


48% of clients allocate vacant space by prorating to all business units.

- Prorated to all business units
- Allocated to real estate
- Allocated to business unit
- Other

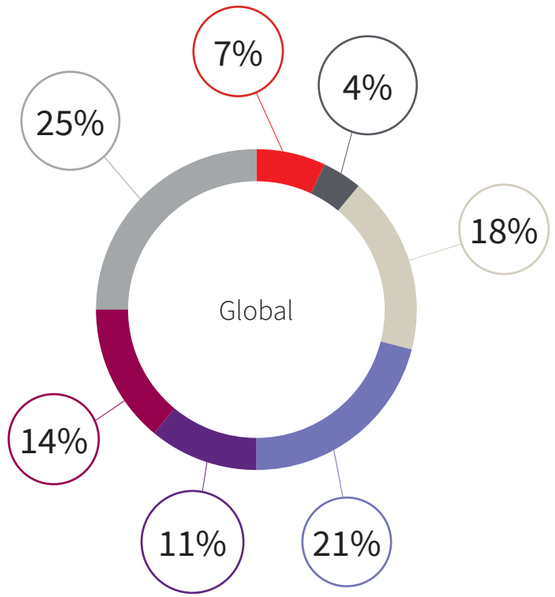
Allocations update frequencies

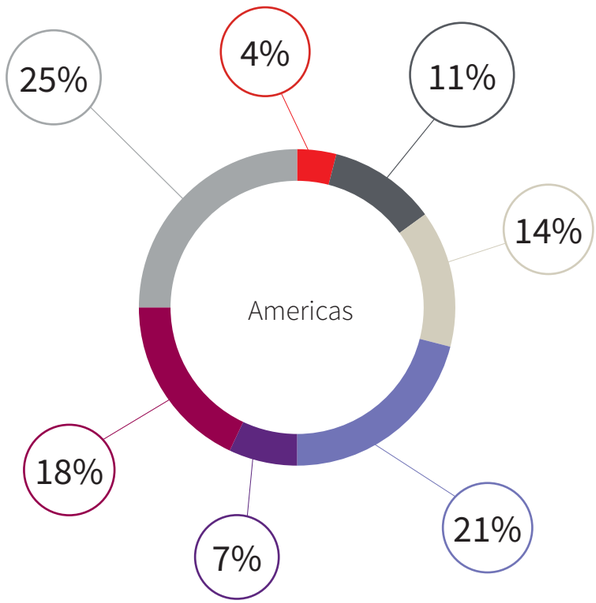
59% of clients update their allocations as needed **(33%)** or monthly **(26%)**

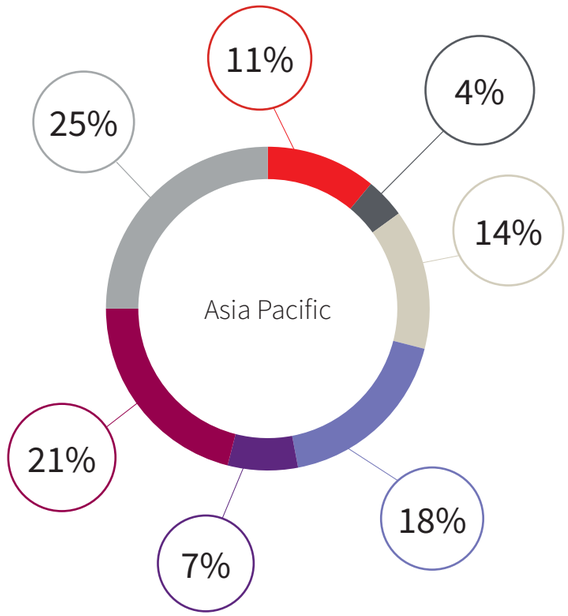


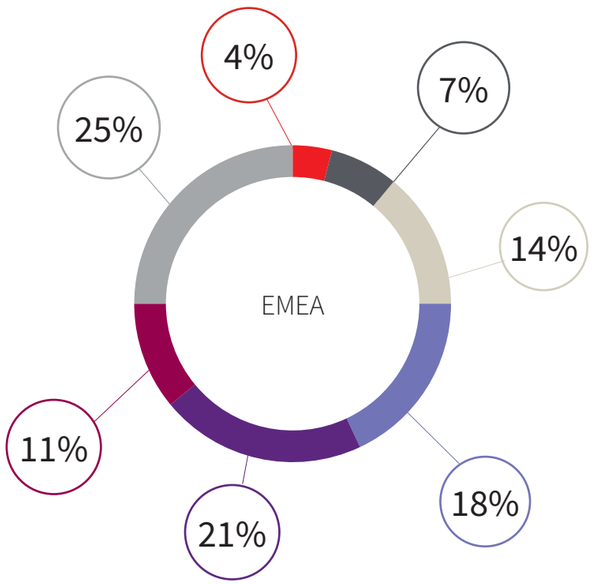
Allocation benefits

The reasons clients allocate space is to better understand space ownership and vacancy rates.









Understand ownership of SF in portfolio
Understand vacancy rate
Understand density
Increase adoption of mobility
Chargeback space to the business units
Look for cost savings
Other

Technology

Introduction

Real estate is typically the second- or third-largest expense for most organizations. So effectively managing the real estate lifecycle is key to reducing costs and increasing efficiencies for any organization – and requires modular deployment of a strategic, integrated suite of technology. Computer-Aided Facility Management (CAFM) technology, more commonly referred to as Integrated Workplace Management System (IWMS) applications, provide an end-to-end suite of tools to manage real estate, typically built on a foundation of space. These systems help optimize space and many related processes, such as moves, maintenance operations and service standardizations.

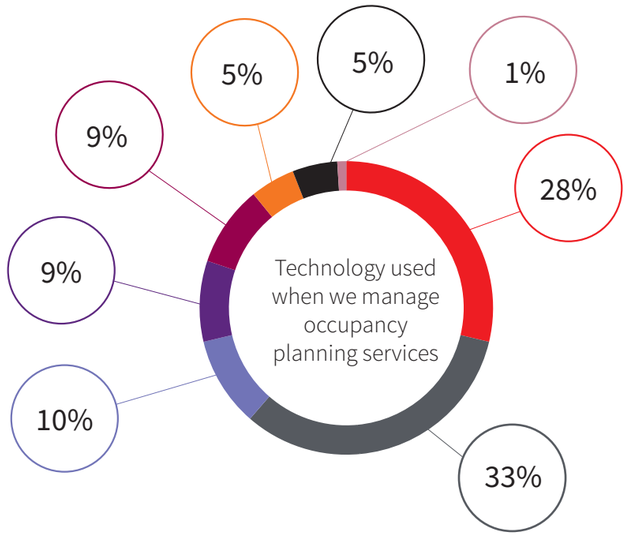
Last year, we changed the way real estate technology is delivered by acquiring BRG, a recognized expert in workplace technology consulting and technology implementation. Now, we have capabilities across the complete CRE technology spectrum – delivering solutions that retain and maximize our clients' investment in technology, while helping them evolve towards actionable business intelligence and insights. By providing holistic, end-to-end technology solutions that support specialist software applications as well as broad IWMS technology, we offer clients more flexibility and choice in their technologies. On top of that, we are the largest and most successful IWMS implementer in the world with dedicated practices and expert certification in ARCHIBUS, IBM TRIRIGA, Manhattan, CenterStone, FM:Systems and iOffice.

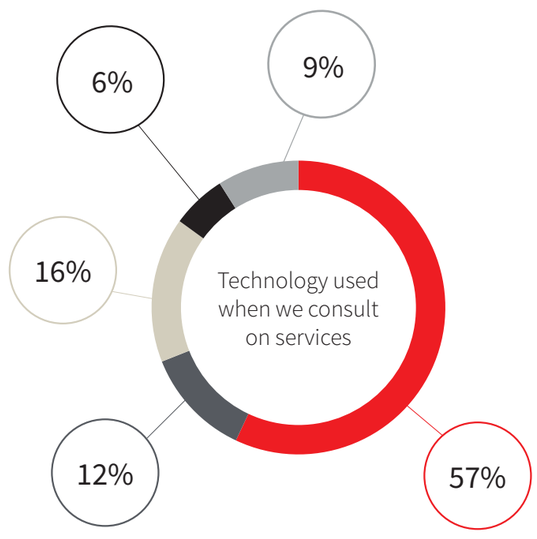
Clients can harness their CRE technology as a strategic business driver, regardless of where they may be in their technology journey.

Census

The following CAFM/IWMS systems are used to manage our clients' portfolio:

	Global	Americas	Asia Pacific	EMEA	Total
FM:Systems	4	12	5	2	23
SPACE powered by FM:Systems	5	15	3	3	26
ARCHIBUS	1	5	1	1	8
Manhattan	2	4	0	1	7
Other	1	3	3	0	7
Serraview	0	1	3	0	4
IBM TRIRIGA	0	2	1	1	4
Portfolio not tracked in a CAFM/IWMS system	0	0	1	0	1

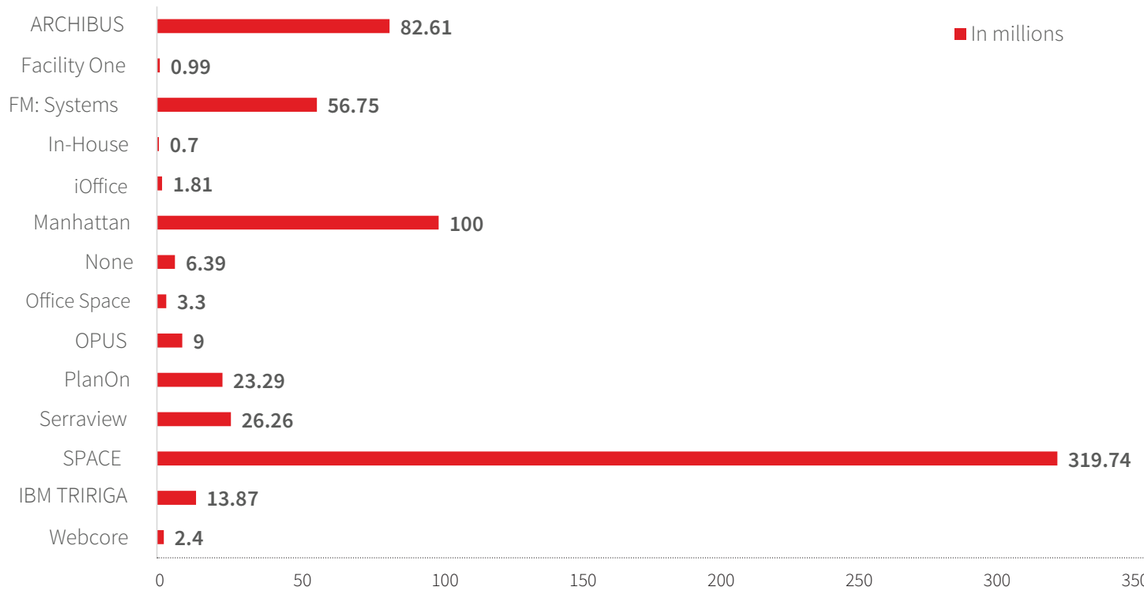




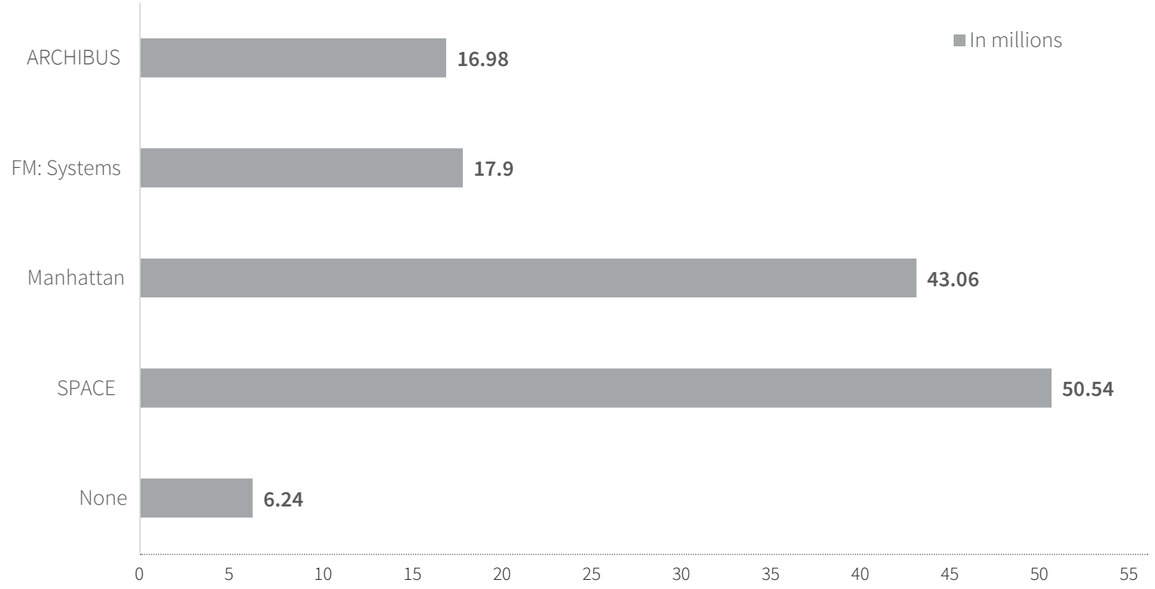
Note: not representative of overall market share

Square footage in each CAFM/IWMS system

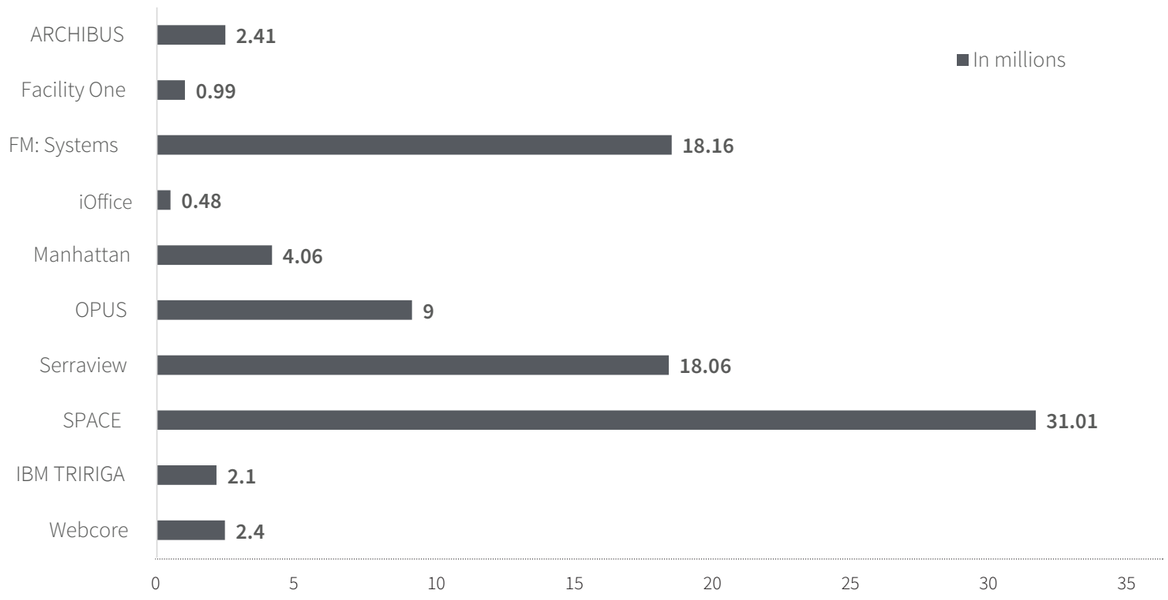
Global



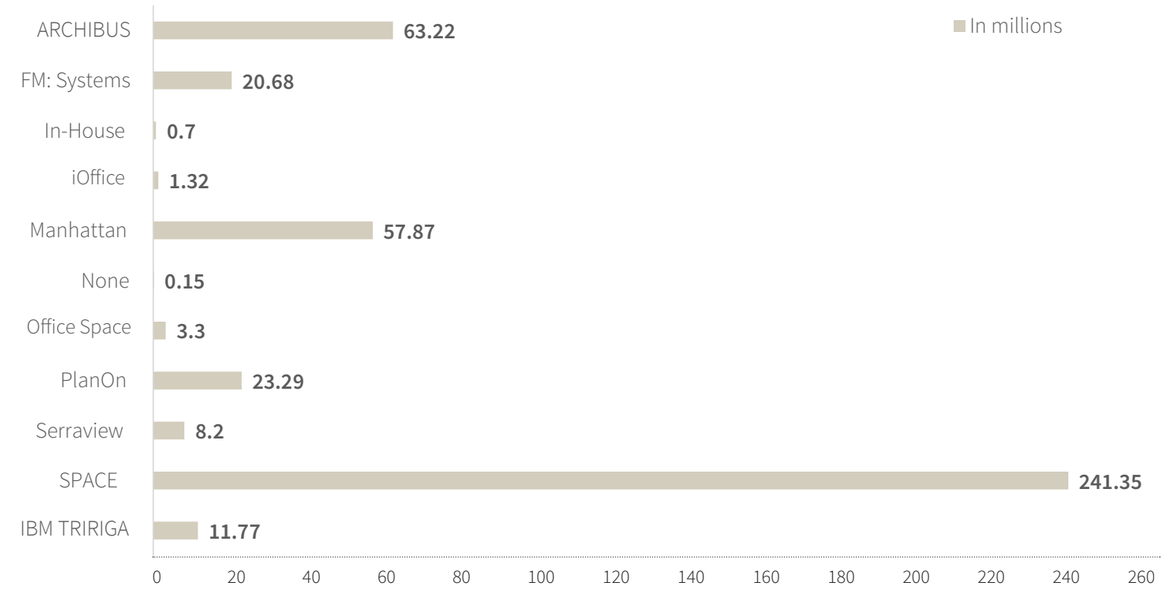
EMEA



APAC

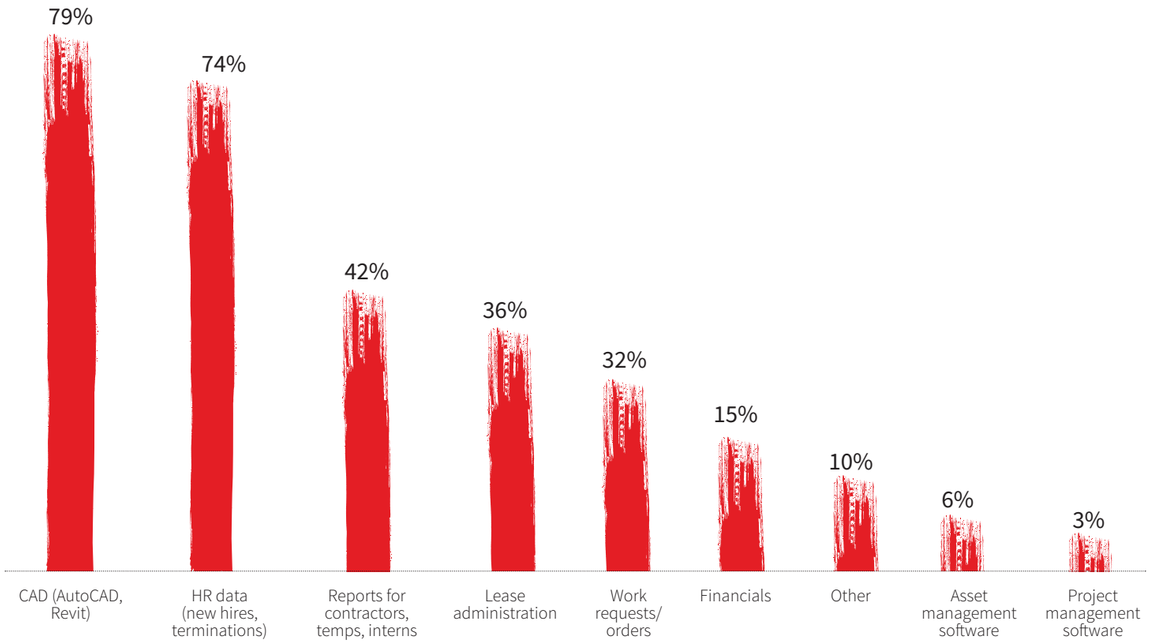


Americas



Note: not representative of overall market share

Tools and software integrated into CAFM/IWMS system



Most clients' IWMS/CAFM systems interface with CAD (79%) and HR data for new hires and terminations (74%). Less than half (42%) of clients' IWMS/CAFM systems interface with HR reports for contractors, interns and temporary employees. More than 20 clients' IWMS/CAFM systems also interface with lease administration portals and work orders/requests. Compared to the rest of the regions, clients' systems in EMEA usually don't interface with lease administration technologies. No global and EMEA clients, and very few clients in the Americas and Asia Pacific integrate asset management software and project management software into their CAFM systems.

Top trends in technology

Trends

Special thanks to our contributors

Americas

Cynthia A.
Bernard A.
Kathy A.
Nino A.
Josh A.
Beth A.
Michael A.
Rusty A.
Kathleen A.
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Bob B,
Jocelyn B.
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Nhan N.
Tam N.
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Erin O.
Ramil O.
Christina O.
Katie O.
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Amita P.
Sharifah P.
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Jalen P.
Andrea P.
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Vickie Q.
Cindy Q.
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Laura S.
Karen S.
Kim S.
Shital S.
Marcy S.
Lorene S.
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Francesca S.
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Martha S.
Ted S.
Katelin S.
Margaret S.

Amant, A.
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Debra S.
Martine S.
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Bob T.
Alexandra T.
Carolyn T.
Lorie T.
Luc T.
Zandra T.
Ron T.
Michael T.
Deborah T.
Brynna T.
Pam V.
Sam V.
James V.
Jamie V.
Jennifer V.
Joe V.
Andy V.
Kim V.
Abby V.
Gina V.
Leah V.
Susan W.
Dan W.
Kathryn W.

Megan W.
Diana W.
Summer W.
Brock W.
Guy W.
Laura W.
Vicky W.
Casey W.
Peggy W.
Katie W.
Sophie X.
Bob Y.
Tracey Y.
Louise Z.
Amanda Z.

EMEA

Graham A.
Geoffrey B.
Julie B.
Anita B.
Paolo C.
Karen C.
Andrew D.
Deborah D.
Caroline F.
Dean H.
Lesley H.
Raj H.
Lyndsay H.
Soozan I.
Alan J.
Li Yin L.
Lenka J.
Katie L.
Justin L.
Andre M.
Oxana P.
Lloyd Q.
Sarah R.
Peter T.
Dee V.
Mita V.
Paul V.
Remya V.
Toby W.
Julie W.
Kirsten L.
Patrik Z.
Li Yin L.

APAC

Gwen Ang
Rosten G.
Fiona L.
Sam S.
Linda A.
Elly M.
Karen W.
Lalu C.
Bharathe I.
Rajendra K.

Abhishek G.
Tushar P.
Deepika C.
Ravi Kiran A.
Darshan C.
Shradda G.
Pramod M.
Poojitha M.
Dawn E.
Rashad F.
Emily N.
Joyce C.
Fiona T.
Amita G.
John C.
Sachin L.
Craig P.
Grace Z.
Xin Vicky Z.
Emily H.
Jonas B.
Froilan F.
Mauro L.
Nurul Aida A.
Arun K.
Emma L.
Zety Akhtar M.
Minh Tien N.
Semele W.
Steven Z.
Ysa Isabelle D.
Michael T.
Maki H.
Jenny S.
Ashwin K.
Wayne W.
Jeremy D.
Daniel L.
Deepthi V.
Rachel R.
Johanna T.
Li Lin C.
Clifford S.
Prashant V.
Alex B.
Tom B.
Tuyen C.
Shae H.
Cameron H.
Rob L.
Jet T.
Lynn W.
Meng Z.
Chandrashekar K.
Harish P.
Sree Priya V.
Rachna B.
Renu G.
Vijay J.
Narayana S.
Srinivasa P.

Thank you

We hope the 2017 edition of our Occupancy Planning Annual Report helps you achieve your occupancy and space program(s) ambitions in the future. As always, feel free to reach out to any of our Occupancy Planning leaders around the world about your journey. We're passionate about what we do and hope the data and trends within this report can validate the programs you already have in place and/or identify potential gaps to revisit in the future.

We look forward to sharing even more of our robust innovations, automations, technology advances and partnerships in 2018 and beyond.

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