Occupancy planning trend report

Mobility programs

Mobility programs help CRE leaders create positive human experiences while squeezing the most value out of space. This report includes findings from our survey of prominent real estate teams around the world that you can apply to your workplace planning.

Making sense of mobility programs

Granting employees flexibility in determining where and when they work best—in other words, mobility or agility—can be a meaningful factor in shaping a positive, memorable human experience. It also offers CRE teams a chance to breathe new life and agility into underutilized space.

One strategy that organizations use to enhance their human experience goals is to create an agile, energetic environment that allows their employees to work efficiently and, in turn, converts underutilized square footage into space that employees want to use. Mobility offerings can help employees work more efficiently within the office as well as remotely. These programs are instrumental in building an innovative, collaborative culture that attracts and retains top talent by giving them the freedom to work where they work best, as well as helping them feel connected and empowered wherever they choose to work.

Definitions

- **Mobility/agility program** – A program that outlines the framework to allow employees to have unassigned seating within the organization's physical workspace, and to work from different locations outside and inside the workspace provided by the organization.

- **Neighborhood** – A designated area of workspaces, which usually vary in configuration within a mobile or agile workplace where a specific group of employees sit. Neighborhoods can be classified by job function, project team, department, geography or other categorizations.

- **Dynamic zone-based planning (agile OP)** – A process that supports business-as-usual occupancy planning (OP) needs in agile/unassigned seating environments. This includes the allocation of zones or neighborhoods to segments of the occupant population, the daily movement between those zones and the planning of larger initiatives such as restacks, consolidations and other space solutions necessary in support of changing and evolving business needs.

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

- **Mobility ratios (seat:employee)** – The ratio used to measure the total number of workspaces to number of employees.

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


Research methodology

We asked prominent real estate teams from around the world to answer roughly 100 detailed questions about how they use their space. Ninety-one organizations participated in the survey, providing a response for each region in which they operate. In total, we received 162 responses.

Mobility/agility programs on the rise

Sixty percent of our respondents have mobility programs and the trend shows no sign of slowing, with our surveys indicating that this rate has increased consistently over the last three yea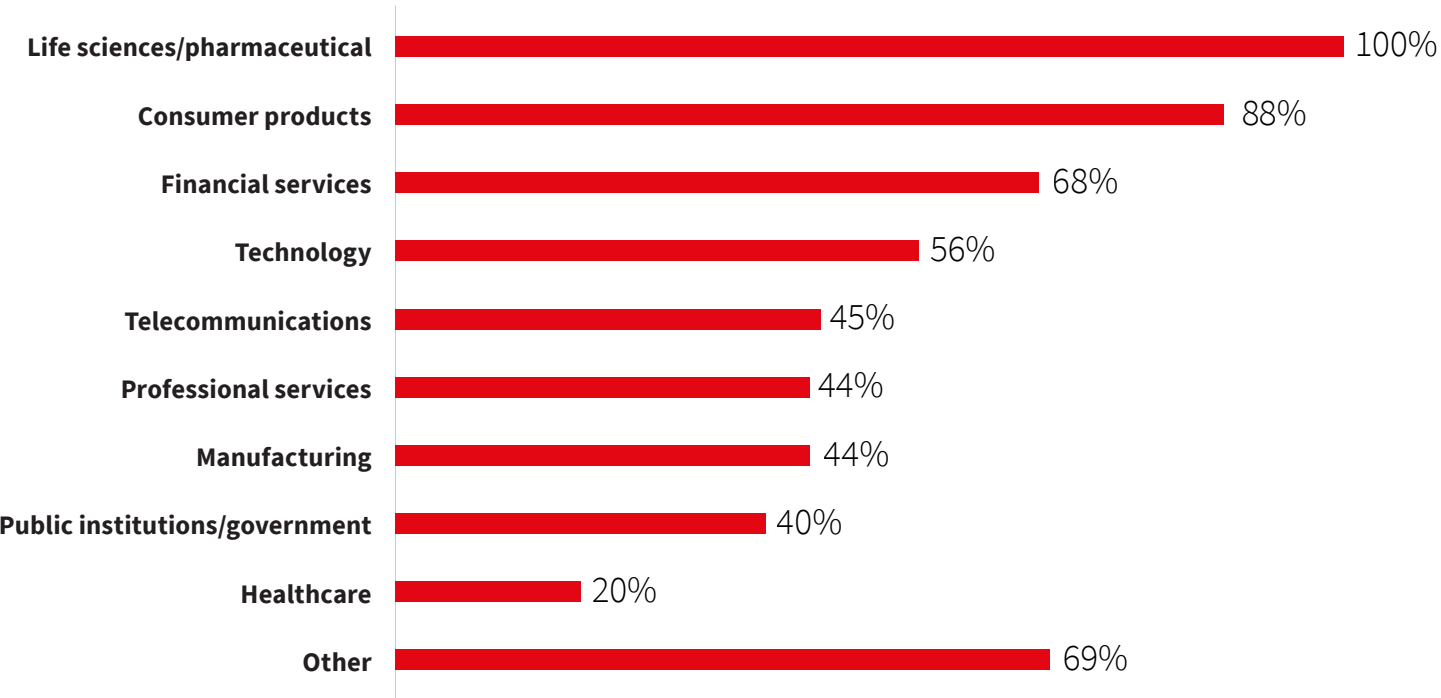rs. We expect this percentage to continue to grow as more workplace leaders realize how mobility and agility can support a range of organizational goals, from improved engagement and productivity, to more efficient space utilization.

Do you have a mobility/agility program?

	2017	2018	2019
No	57%	52%	60%
Yes	43%	48%	40%
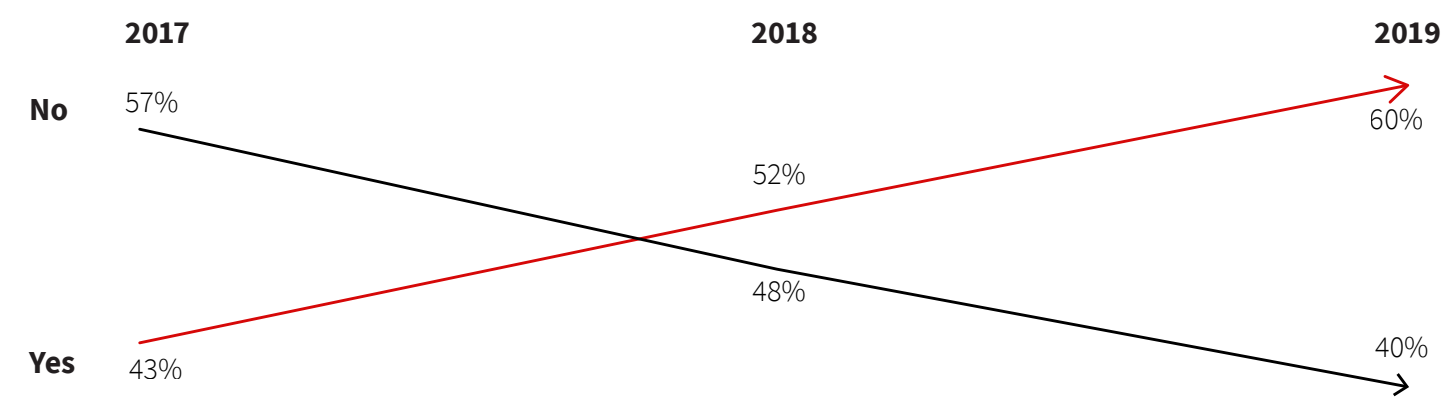
2019-2020 Mobility by industry

All of the life sciences/pharmaceutical companies we surveyed have a mobility program in place. In second is the consumer products industry: 88% of these respondents have a mobility program in place.

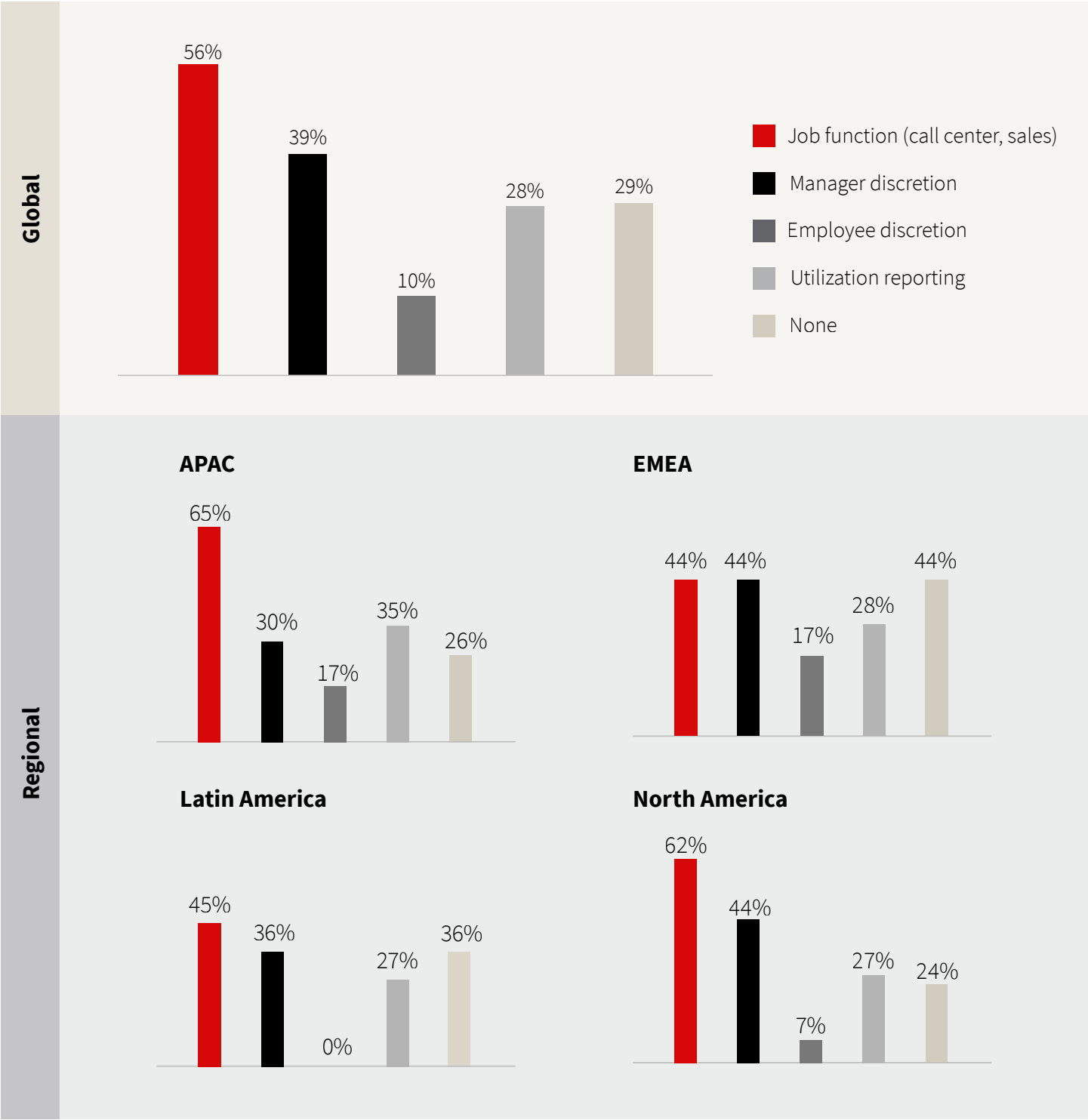| Industry	Percentage
Life sciences/pharmaceutical	100%
Consumer products	88%
Financial services	68%
Technology	56%
Telecommunications	45%
Professional services	44%
Manufacturing	44%
Public institutions/government	40%
Healthcare	20%
Other	69%

Criteria for mobility/agility program eligibility

Globally, most companies say job function and manager discretion are the top criteria used for determining employee eligibility for their mobility/agility programs,

although there are some notable geographic differences. For example, 65% of firms in APAC use job function as one criterion for eligibility, compared to just 44% in EMEA.
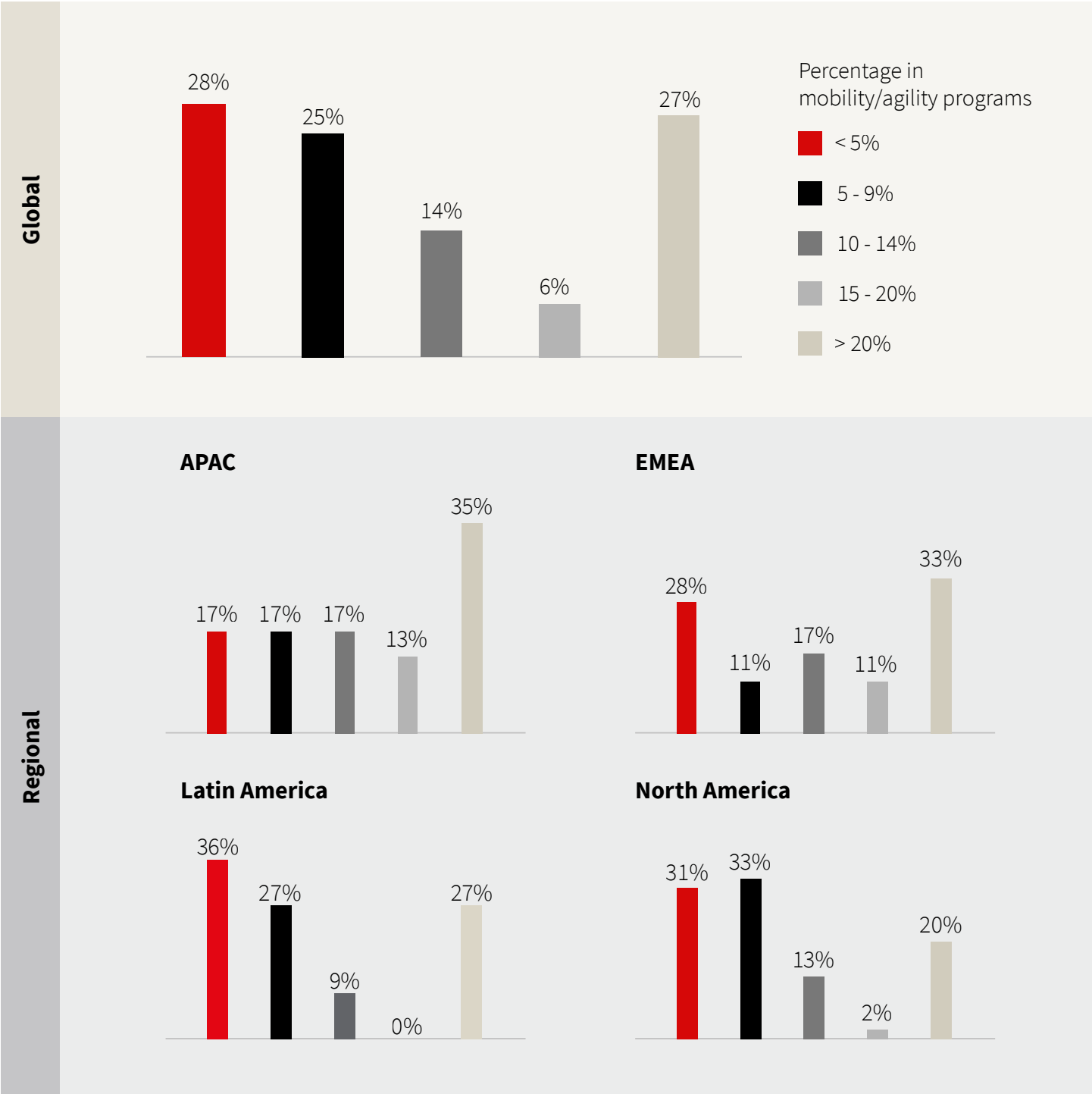
What criteria is used to determine employee eligibility for the mobility/agility program?

Legend:
- Job function (call center, sales)
- Manager discretion
- Employee discretion
- Utilization reporting
- None

Global
- 56%
- 39%
- 10%
- 28%
- 29%

APAC
- 65%
- 30%
- 17%
- 35%
- 26%

EMEA
- 44%
- 44%
- 17%
- 28%
- 44%

Latin America
- 45%
- 36%
- 0%
- 27%
- 36%

North America
- 62%
- 44%
- 7%
- 27%
- 24%

Percentage of employees in mobility/agility programs

The share of mobile/agile population also varies widely among regional respondents. Globally, 53% of respondents report the mobile/agile population is less than 10% of their workforce. The mobile population accounts for over a fifth of the total employee population for 27% of respondents.

This robust mobility population is driven in part from technology firms, which tend to have advanced networking and connectivity capabilities that ease collaboration, even when individuals are on the move.
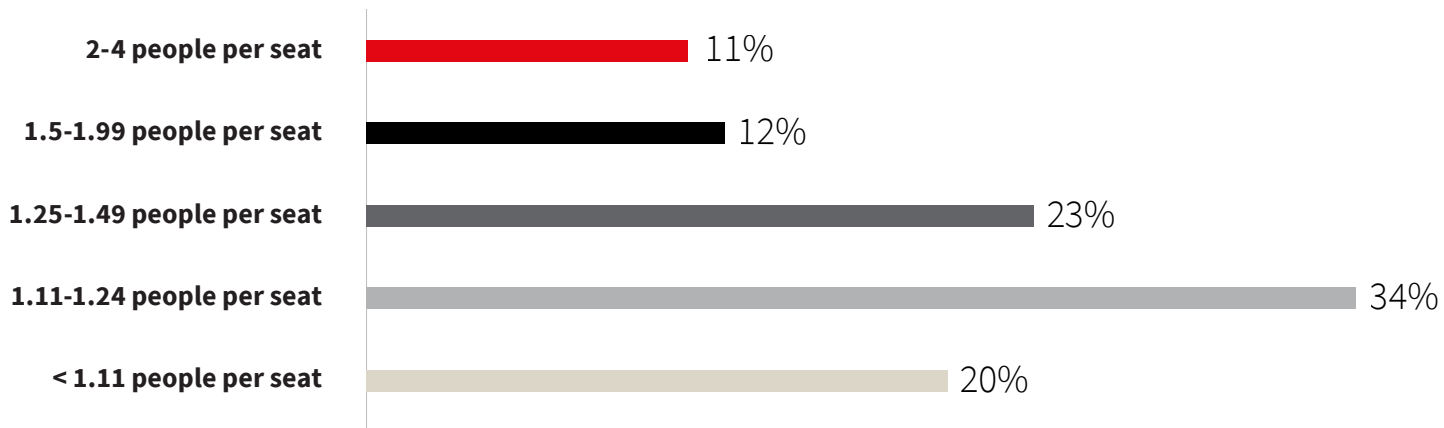
Global

28% — 25% — 14% — 6% — 27%

Percentage in mobility/agility programs
- 🟥 < 5%
- ⬛ 5 - 9%
- ⬛ 10 - 14%
- ⬜ 15 - 20%
- ⬜ > 20%

Regional

APAC
17% — 17% — 17% — 13% — 35%

EMEA
28% — 11% — 17% — 11% — 33%

Latin America
36% — 27% — 9% — 0% — 27%

North America
31% — 33% — 13% — 2% — 20%

Percentages may not add up to 100 due to rounding.

Average number of people for each mobile/agile seat

Over a third of respondents (34%) have, on average, a mobility seat ratio between 1.11-1.24 people for each mobile/agile seat and 23% have ratios of 1.25-1.40. Rather than the 1:1 person-to-seat ratio of yesteryear, this evolving number represents growing awareness that mobility-oriented solutions can help firms make better use of their space. As organizations continue to get comfortable with mobility programs and improve at measuring utilization, this ratio will likely rise further in the future.

2-4 people per seat	11%
1.5-1.99 people per seat	12%
1.25-1.49 people per seat	23%
1.11-1.24 people per seat	34%
< 1.11 people per seat	20%

Percentages may not add up to 100 due to rounding.

Structured work-at-home components

Over the past three years, organizations have moved away from structured work-at-home components as part of mobility programs. Just 37% of respondents report having a work-at-home component in 2019, compared to 36% in 2018.

Organizations are investing in mobility/agility solutions within the workplace as well as flexible and coworking solutions to meet their employees' needs, which may be contributing to the decline in work-at-home programs.

Does the mobility/agility program have a structured work-at-home component?

2017   **2019**
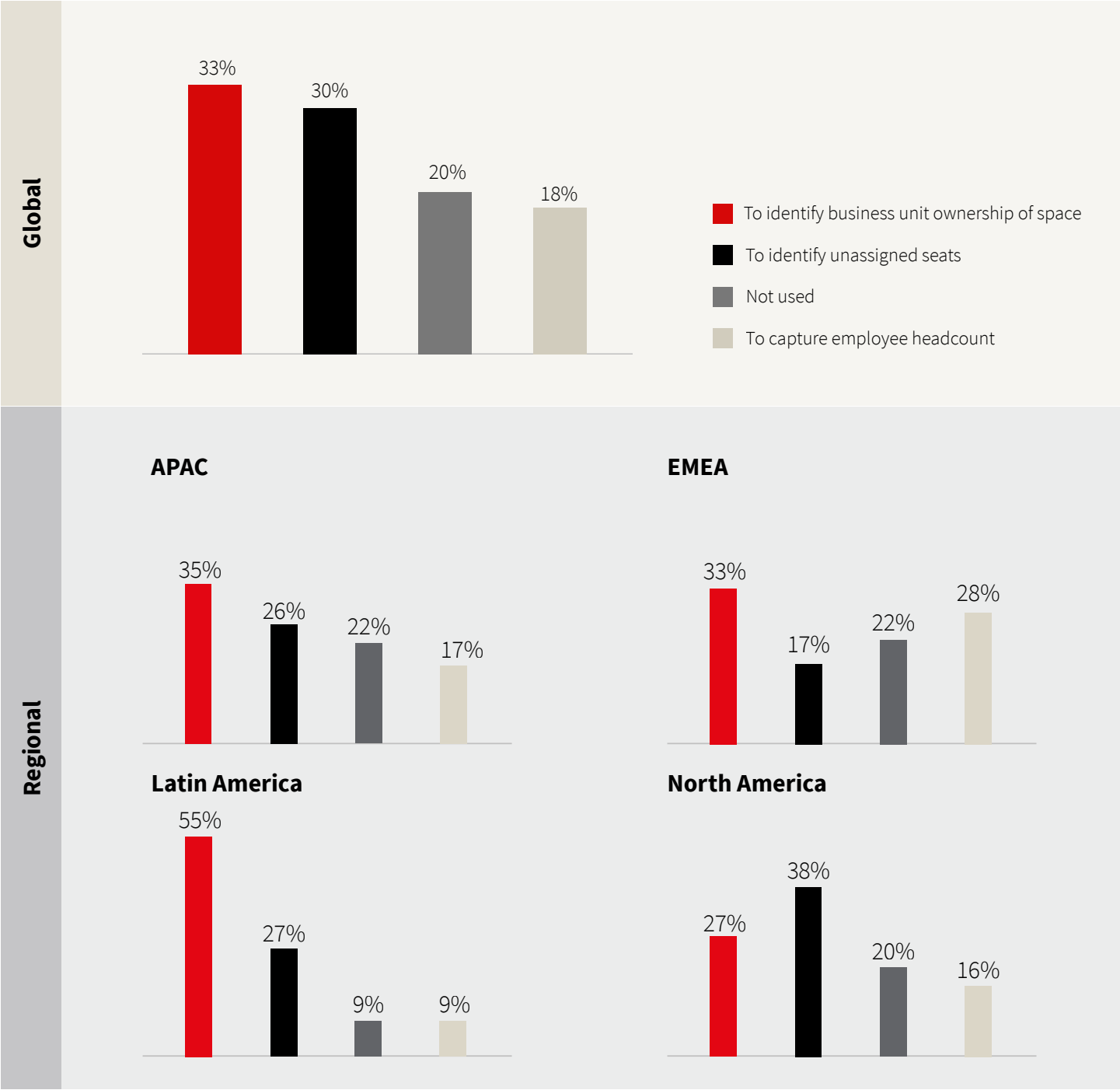
Yes

40%

37%
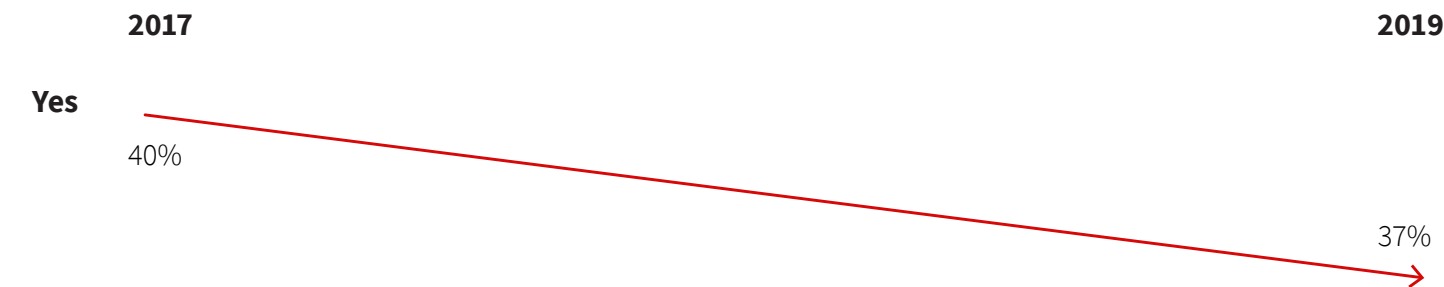
Use of neighborhoods

Globally, CRE leaders most often use neighborhoods in their mobility/agility programs because they say it helps them identify business unit ownership of space, as well as identify unassigned seats. These uses have been the top two reported by organizations over the past three years.

Identifying business unit ownership of space also helps leaders understand the level of space by work activity and job function. Then they can make adjustments to neighborhood boundaries as utilization data identifies if they are over- or undersubscribed.

How does the mobility/agility program use neighborhoods?

Global

- 33%
- 30%
- 20%
- 18%

■ To identify business unit ownership of space

■ To identify unassigned seats

■ Not used

■ To capture employee headcount

Regional

APAC

- 35%
- 26%
- 22%
- 17%

EMEA

- 33%
- 17%
- 22%
- 28%

Latin America

- 55%
- 27%
- 9%
- 9%

**North America**

- 27%
- 38%
- 20%
- 16%

Percentages may not add up to 100 due to rounding.

Future use of mobility/agility programs

Looking ahead, we expect to see mobility expand even further over the next three years, as firms continue to see the human and business value of these programs.

Sixty-seven percent of respondents report they have expansion plans for mobility/agility programs, while only 4% expect to contract these efforts.

Expand mobility/agility program	67%
No change in mobility/agility program	28%
Contract mobility/agility program	4%
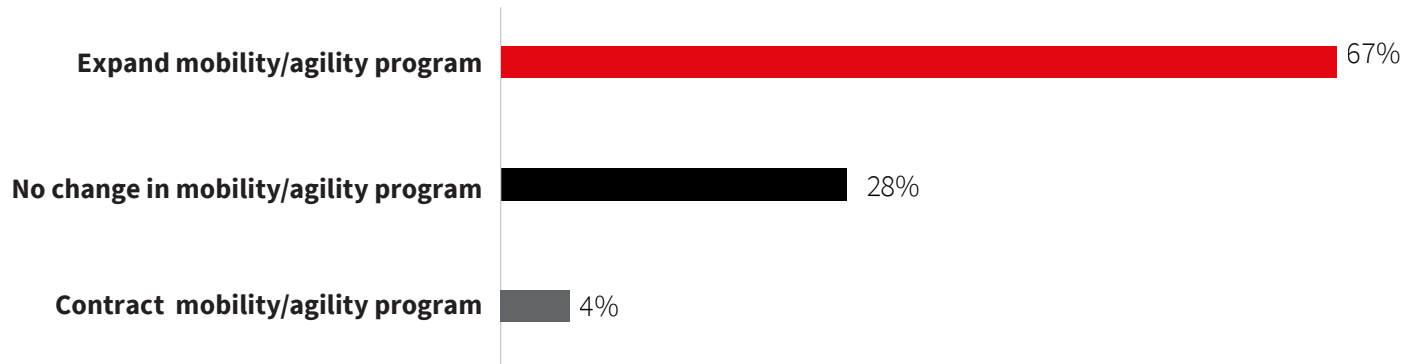
Percentages may not add up to 100 due to rounding.

Key takeaways

- Workplace mobility helps organizations of all sizes reduce underutilized space and adapt to changing employee work habits and preferences. It boosts efficiency and productivity, and can be a key component in attracting employees who want to use space that best suits their needs to produce work that brings greater value to the enterprises they serve.

- Thanks to these benefits, mobility/agility program adoption has seen robust growth and is projected to expand over the next three years.

- Conversely, work-at-home programs continue to decline as employers create a more engaging and agile workplace for employees.

- The growth of mobility/agility programs reflects the trend toward activity-based work, as much of the mobile population is selected based on job function.

Learn more

The changing world of work requires global leaders to seek out and act on novel ways to stay ahead. Understanding how other organizations are adapting their space strategies can help.

JLL publishes additional research findings and insights on trends driving workplace transformation, including:

- **Key occupancy benchmarking metrics**
- **Space eligibility and standards**
- **Space allocation and chargebacks**
- **Coworking**
- **Utilization**
- **Demand forecast planning**

Visit our online space planning resource center to learn more.

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