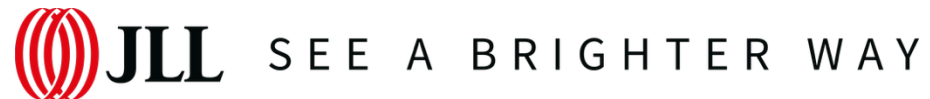**10th Anniversary Edition**

# Global Occupancy Planning Benchmark Report 2025

**The new occupancy equation: Balancing portfolio optimization with human experience**

**JLL** SEE A BRIGHTER WAY

# Foreword

In today's rapidly evolving workplaces, occupancy planning has become an essential strategic function for organizations worldwide. As we navigate the complexities within work environments, the need for data-driven decision-making in real estate portfolio management has never been more critical.

Marking JLL's 10-year anniversary of the Global Occupancy Planning Benchmark report, the 2025 edition brings together insights from **99 organizations collectively representing 745 million s.f. of real estate portfolios** across North America, Latin America, Europe, Middle East, Africa, and Asia Pacific regions. This research provides a comprehensive view of how leading organizations are optimizing their workplaces to balance employee experience, space utilization and financial objectives.

What makes this year's findings particularly compelling is the clear shift toward portfolio optimization, as organizations move beyond initial hybrid implementation to focus on refining and enhancing their workplace strategies with an eye on the bottom line. We are seeing an increased level of sophistication in data collection methods, greater integration of technology solutions, and a renewed emphasis on creating workplaces that truly support the diverse needs of today's workforce.

As our shared knowledge and experiences become even more valuable in creating workplaces that drive both organizational success and employee satisfaction, I invite you to explore these insights and consider how they might inform your own occupancy planning and workplace experience strategies.

> " What makes this year's findings particularly compelling is the clear shift toward portfolio optimization, as organizations move beyond initial hybrid implementation to focus on refining and enhancing their workplace strategies with an eye on the bottom line.

**Melissa Michalik**
*Global Occupancy Planning & Management (OPM) Leader, JLL*

This report is interactive!

Click on each topic to go straight to that section.

To come back to this page, use the ⌂ located in the top-right corner of each page.

# Key insights

## 1

Go to section

**Portfolio optimization rises to become the leading corporate real estate objective.**

The shift signals maturing workspace strategies as organizations progress from understanding their portfolios through better data reporting—the number one priority in 2024—to actively leveraging these insights to make strategic space decisions. Sustainability also remains a significant priority for CRE leaders.

**Call to action**

Develop a holistic approach that strikes the right balance between cost-efficiency, employee experience and corporate flexibility goals when building portfolio optimization strategies, maximizing real estate as an asset and competitive advantage that ultimately drives organizational success.

## 2

Go to section

**Advanced occupancy data and analytics deliver actionable insights for workplace strategies.**

While comprehensive occupancy metrics have proven essential for effective workspace management, many organizations continue to struggle with their data efforts. Conversely, organizations with advanced data capabilities gain significant advantages in space allocation and portfolio optimization.

**Call to action**

Prioritize solutions that integrate multiple data sources into unified, AI-powered visualization platforms that identify utilization patterns, generate real-time and predictive insights, and enable agile space allocation for more dynamic workspace management.

# Key insights

## 3

Go to section

**Office utilization continues to improve across all regions, but utilization targets are also being raised.**

While office utilization has continued to rise, so have utilization targets as organizations look to further rightsize their real estate portfolios and manage operating costs. Closing the utilization gap will remain a top priority for organizations in a hybrid environment.

**Call to action**

Implement consistent measurement methods portfolio-wide and supplement quantitative metrics with qualitative employee feedback. This will unify and contextualize utilization insights to inform decisions about portfolio optimization, workspace design and policy implementation.

## 4

Go to section

**Hybrid work evolves to adopt more structure, governance and technological support.**

More organizations are now taking a structured approach that enables predictable attendance patterns while fostering in-person collaboration. We also see expanded governance and support systems, as well as greater investment in technology and facility modifications to support hybrid working.

**Call to action**

Focus on optimizing space utilization through data-driven hybrid work strategies, emphasizing structured in-office schedules and investing in collaboration spaces as well as technology solutions to improve employee experience and support a more predictable and efficient workplace.

# Key insights

## 5

Go to section

**Individual workspaces continue to shift toward more desk sharing and higher density standards.**

To amplify space utilization, organizations are working toward smaller, more standardized sizes for offices and workstations, while shifting from permanent, assigned spaces to agile seating with a target to further increase seat sharing ratios and density metrics.

**Call to action**

Plan for regular assessment of workplace effectiveness and be prepared to adjust space standards based on utilization data and employee feedback. Implementing pilot programs before wide-scale deployment can provide valuable insights and reduce the risk of misaligned decisions.

## 6

Go to section

**Dual focus on collaborative and individual work enhances engagement and productivity.**

Organizations are evolving their space designs to support diverse work activities, enabling employees to seamlessly transition between interacting with others (in-person and virtually) and concentrating on heads-down work without interruption. Meanwhile, wellness and cultural spaces are on the rise.

**Call to action**

Consider developing modular, reconfigurable spaces that can quickly transform between different work modes, rather than making permanent, inflexible changes. This adaptability should extend to furniture systems, technology infrastructure, and space allocation processes.
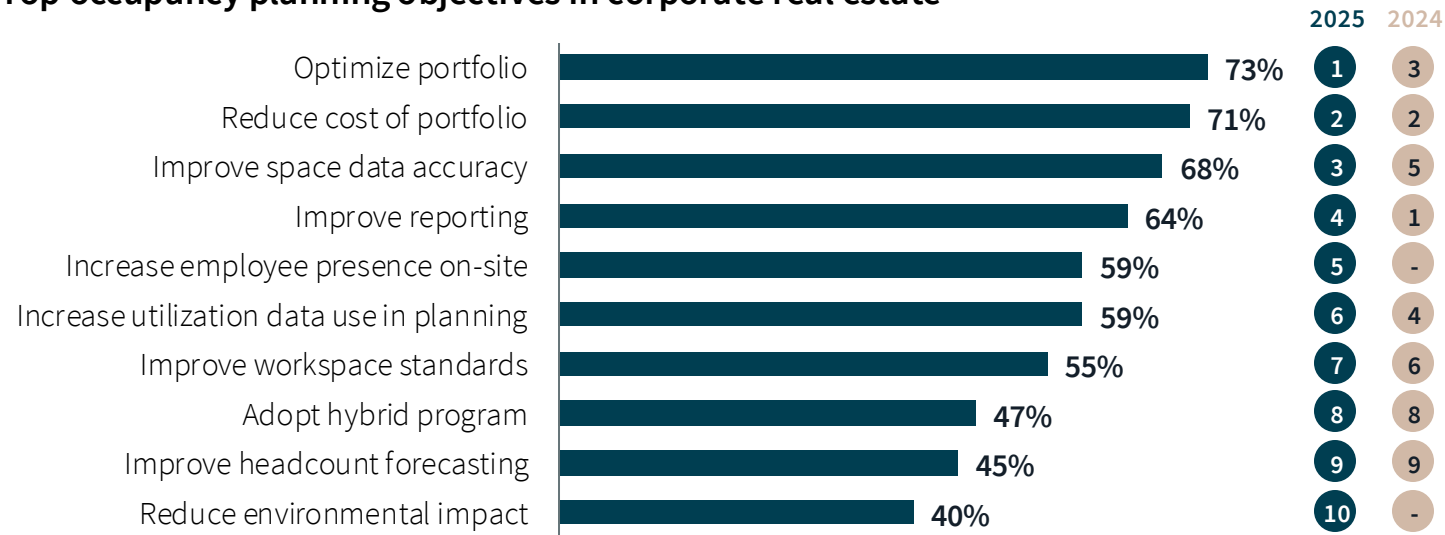
# 01

## Portfolio optimization rises to become the leading corporate real estate objective

**Portfolio optimization** has surpassed **improved reporting** and **portfolio cost reduction** to become the top priority for corporate real estate leaders in 2025, with 73% of respondents identifying it as their primary occupancy planning objective. The shift underscores maturing workplace strategies as organizations progress from understanding their portfolios through better reporting—the number one goal in the 2024 survey—to actively leveraging these insights to maximize real estate value.

As another driver of this shift, recent geopolitical and economic instability has heightened uncertainty, prompting organizations to balance growth targets with caution and optimize real estate to control operational costs.

**Increase employee presence on-site** was a new category added in the 2025 survey and debuted as a top-five priority, highlighting the desired balance between providing flexibility and creating an engaging, high-performing workplace.

### Top occupancy planning objectives in corporate real estate

| Objective | 2025 % | 2025 | 2024 |
|---|---|---|---|
| Optimize portfolio | 73% | 1 | 3 |
| Reduce cost of portfolio | 71% | 2 | 2 |
| Improve space data accuracy | 68% | 3 | 5 |
| Improve reporting | 64% | 4 | 1 |
| Increase employee presence on-site | 59% | 5 | - |
| Increase utilization data use in planning | 59% | 6 | 4 |
| Improve workspace standards | 55% | 7 | 6 |
| Adopt hybrid program | 47% | 8 | 8 |
| Improve headcount forecasting | 45% | 9 | 9 |
| Reduce environmental impact | 40% | 10 | - |

# Sustainability remains a focus for CRE

As a key part of portfolio optimization, sustainability remains a significant priority for CRE leaders. Most organizations (74%) report having a sustainability program in place, as they integrate carbon targets throughout the real estate lifecycle to achieve net zero goals.

In support of sustainability goals, JLL provides a range of services to not only reduce environmental impact but often to deliver operational cost savings and improved space efficiency—**creating alignment between environmental and financial objectives**.

## JLL OPM sustainability services

### Test-fit standards
Minimize construction waste by building layout concepts that reuse existing infrastructure
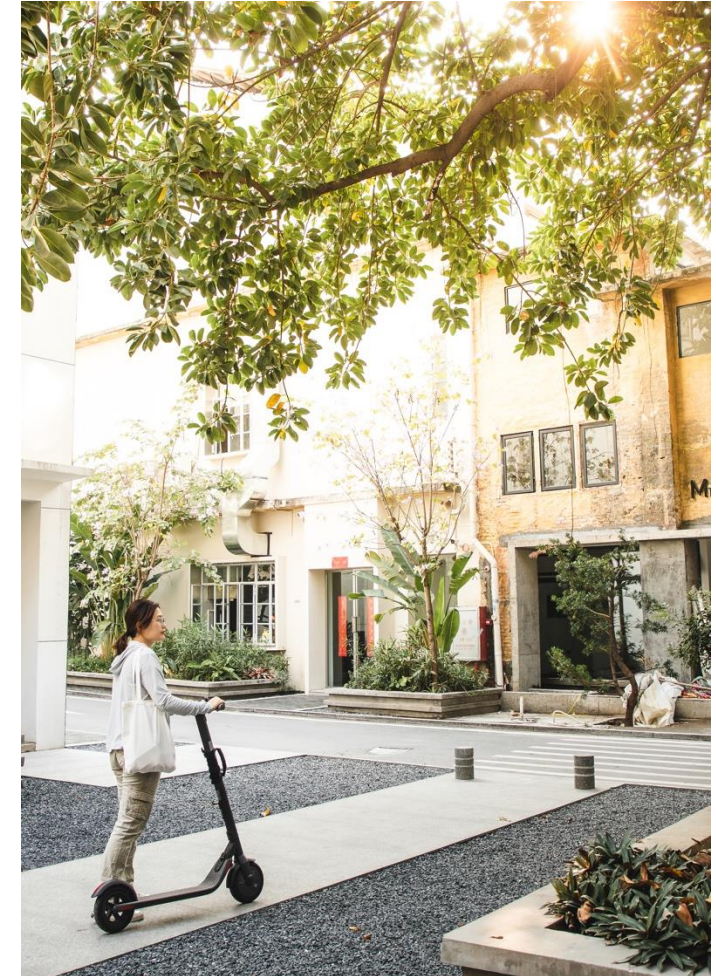
### Rightsizing scenarios
Reduce overall square footage to what is truly needed, helping lower the carbon footprint of real estate holdings

### Furniture reuse plans
Repurpose furniture from elsewhere within the portfolio, or reconfigure it to create new layouts



7

# 02

# Advanced occupancy data and analytics deliver actionable insights for workplace strategies

Organizations reveal their occupancy management priorities in part through their space data investments. JLL occupancy planners maintain space data for 87% of our clients, commonly including space attributes, drawings, occupant assignments and business unit allocations.

Regular auditing is essential for maintaining accurate information. Most organizations practice routine audits quarterly (26%) or monthly (25%), with fewer opting for annual reviews (14%).

Despite the availability of digital tools, organizations still predominantly rely on the traditional method of marking up paper or PDF floorplans before updating CAFM (Computer-Aided Facilities Management) systems, limiting update frequency and accuracy while potentially impacting the quality of decision-making. In fact, 22% of organizations are exploring near-term options to revamp this process.

**Organizations with advanced data capabilities gain significant advantages in space allocation, pattern identification and ultimately portfolio optimization**. However, despite recognizing the importance of occupancy data, many organizations continue to struggle with effective data collection and management. Only about half of organizations rate their data capability as excellent (7%) or good (45%), 28% report average capability that allows ad-hoc measurement, and one in five have poor (15%) to no capability at all (5%)—highlighting a clear opportunity to improve current data collection practices and technologies.

As organizations continue to refine their CRE data strategies, investing in more sophisticated data management capabilities will be essential for enhancing utilization, reducing costs and improving employee experience.
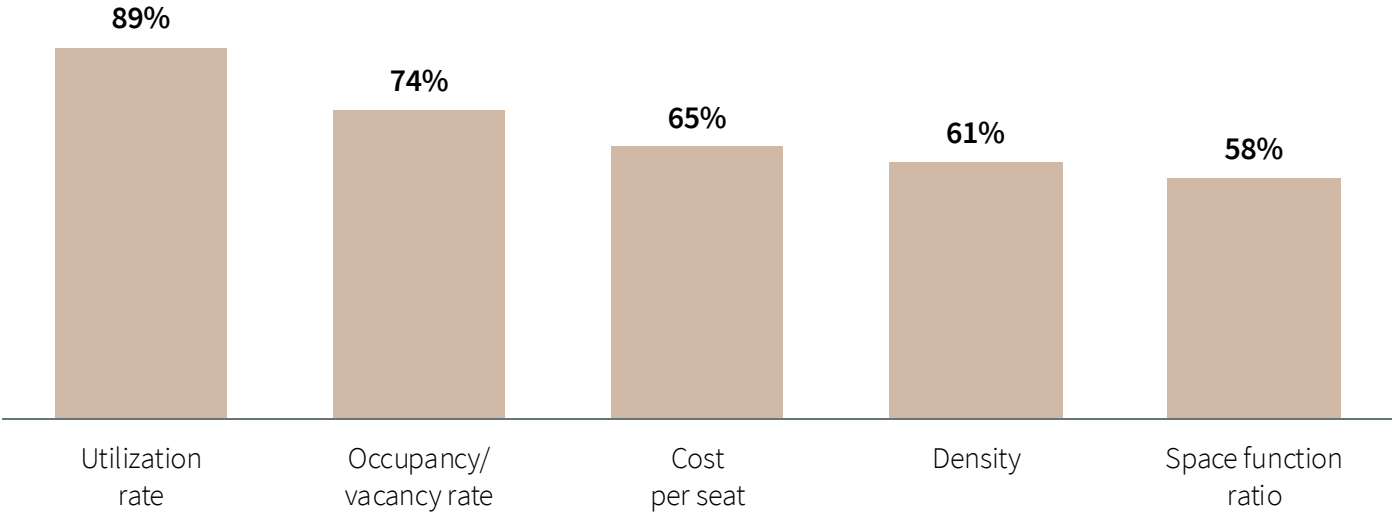
## State of occupancy data capabilities

| None | Poor | Average | Good | Excellent |
|------|------|---------|------|-----------|
| 5% | 15% | 28% | 45% | 7% |

Among various occupancy planning data types, **utilization rate** is ranked the most important metric for the third consecutive year, solidifying its position as the primary workspace performance indicator, above traditional **occupancy/vacancy** data. Organizations that track utilization data have continued to increase (from 62% in 2019 to 74%), as have organizations that apply utilization data for space planning (from 60% in 2019 to 70%). These increases reflect today's dynamic and hybrid workplaces, for which understanding how spaces are used—not just how they are allocated—has become critical for effective portfolio management.

**Cost per seat** has moved up one spot in ranking to become the third most valued occupancy metric. Given an uncertain economic climate, organizations are placing greater importance on understanding how costs play into their portfolio and how potential rightsizing efforts may increase space efficiency and optimize real estate costs.

## Most valued data metrics for occupancy planning

| Metric | Value |
|---|---|
| Utilization rate | 89% |
| Occupancy/vacancy rate | 74% |
| Cost per seat | 65% |
| Density | 61% |
| Space function ratio | 58% |

## Occupancy metrics definitions

**Utilization rate**
Percent of time individual seats are occupied over a specific time such as workdays and shifts.

**Occupancy rate**
Percent of seats allocated for use via individual or group (neighborhood) assignments.

**Vacancy rate**
The inverse of occupancy rate, indicating unassigned seats for purposes of space flexibility and/or future growth.

**Cost per seat**
Operational cost per seat.

**Density**
Measure of efficiency calculated by dividing total office area by headcount or number of seats.

**Space function ratio**
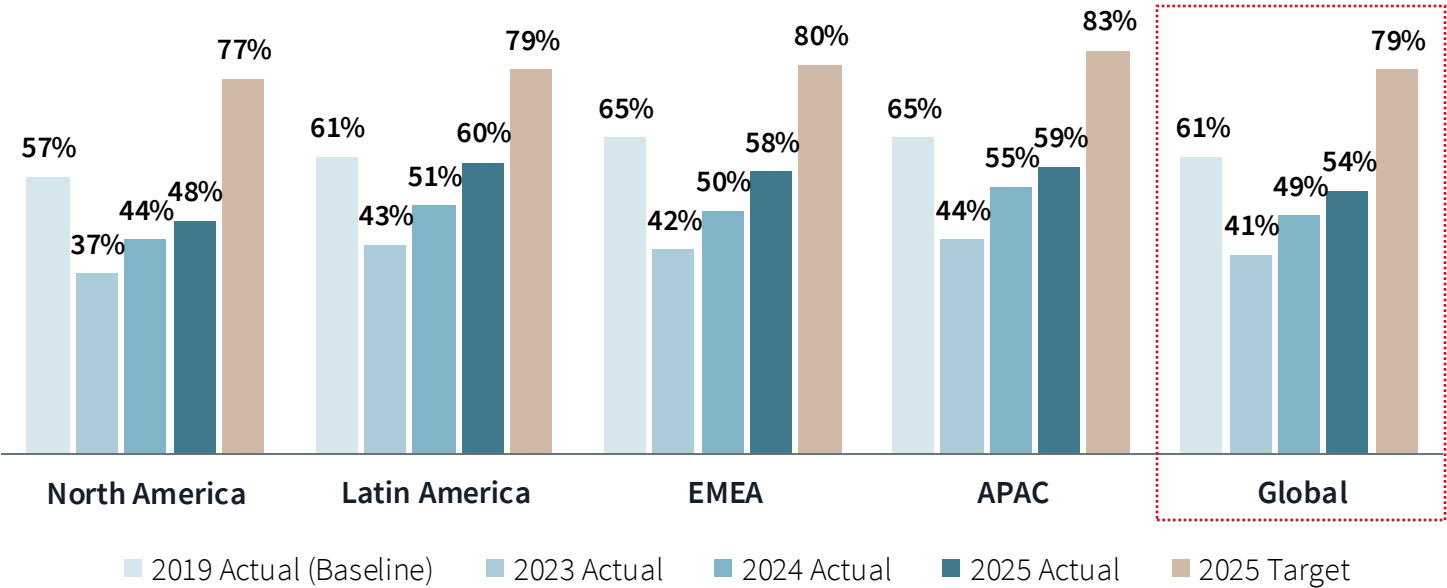Ratio of various space types and functions such as "me" vs. "we" spaces and open vs. enclosed spaces.

# 03

# Office utilization continues to improve across all regions, but utilization targets are also being raised

With improved occupancy planning and continued return-to-office efforts, office utilization has risen globally for the second consecutive year to 54%—up from 49% in 2024 and 41% in 2023—inching closer to the pre-pandemic level of 61%. Latin America and EMEA regions have reported the greatest year-over-year improvements, while North America lags both in terms of actual utilization rate (48%) and the gap between actual and target utilization (29%).

While office utilization has continued to increase, so have utilization targets (79% in 2025 vs. 74% in 2024) as organizations look to further optimize their real estate portfolio and increase operating efficiency. **Closing the utilization gap will remain a top priority for organizations in a hybrid environment**.

**Utilization rates changes by region**



Legend: ■ 2019 Actual (Baseline) ■ 2023 Actual ■ 2024 Actual ■ 2025 Actual ■ 2025 Target

North America: 57%, 37%, 44%, 48%, 77%
Latin America: 61%, 43%, 51%, 60%, 79%
EMEA: 65%, 42%, 50%, 58%, 80%
APAC: 65%, 44%, 55%, 59%, 83%
Global: 61%, 41%, 49%, 54%, 79%

## Tracking utilization

Tracking utilization data involves a multi-faceted approach to provide a comprehensive view of space usage.

- **Badge swipe data** (90%) remains the most common method, offering a cost-effective tool that leverages existing security systems.

- **Reservation systems** (49%) are growing in popularity as organizations implement more formal booking processes for shared spaces.

- **Visual observations** (41%) are also widely applied despite the growth of more precise and automated tracking methods.

Other tools include space sensors, video analytics and AI that provide more granular and dynamic insights throughout the day. These technology-driven approaches offer valuable data for identifying utilization gaps and developing targeted portfolio strategies.

## Calculating utilization

Organizations employ various calculation methods (often more than one), reflecting diverse perspectives on what constitutes meaningful space usage. This also highlights the need for clear definitions when comparing data across organizations or industry benchmarks.

- **Averaging daily peaks** (52%) is the most popular method, focusing on maximum daily attendance.

- **Weekly peaks** (47%) capture the highest attendance points across the week.

- **Specific weekdays** (46%) analyze patterns on certain days, often to understand mid-week vs. Monday/Friday variations.

- **Mandatory in-office days** (20%) measure attendance on days when employees are required to be present.
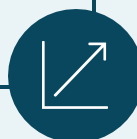
## Improving utilization

A range of strategies are being implemented to help enhance utilization and achieve targets.

- 55% of organizations have **reduced overall footprint** over the past year.

- 42% have enacted **office attendance mandates**.

- 38% have completed **space design changes**.

- 34% have implemented or improved **workplace experience programs**.

- 9% have offered **incentives for office attendance**.

Among these, office attendance mandates are considered the most effective (with 61% reporting positive results), suggesting that more directive approaches can be impactful, though they must be balanced with employee preferences and expectations for flexibility.

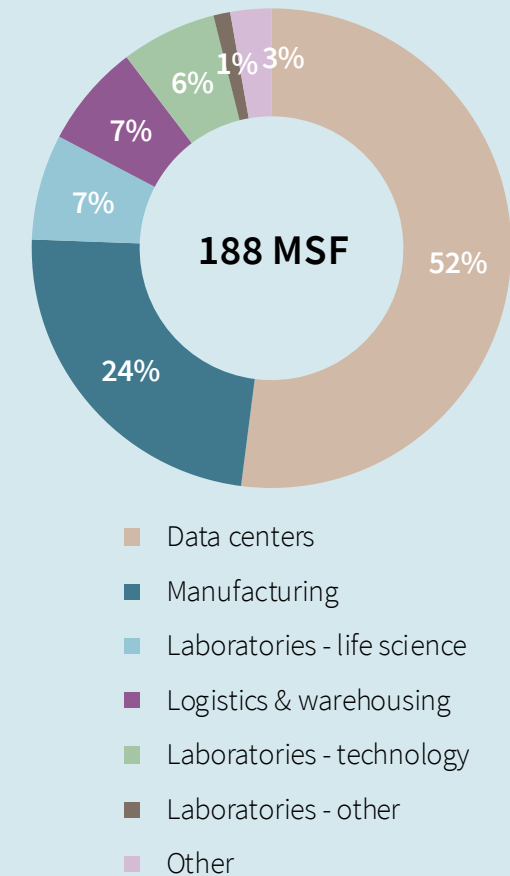# Beyond the office: Measuring and optimizing utilization of technical spaces

While much of the focus on utilization has centered around the traditional office, technical spaces—such as data centers, laboratories, manufacturing, logistics and warehousing facilities—represent a significant portion of many organizations' real estate portfolios. Of the organizations supported by JLL Occupancy Planning and Management, **83% have technical spaces within their portfolio totaling 188 million s.f.**, including 98 million s.f. of data centers and 28 million s.f. of lab spaces.

Globally, **63% of organizations have opted to outsource technical space planning** to strategically leverage the expertise of occupancy planning specialists for critical tactical functions such as:

- Allocations
- Block planning and test-fits
- Space and occupancy audits
- Migration planning
- Asset tracking and assignment

When constructing technical spaces, 43% of organizations opt to apply industry standards, while 57% leverage in-house developed metrics or other variable standards. To manage technical spaces, 63% of organizations track utilization data, mostly through badging, CAFM and sensors. As utilization tracking of technical spaces still lags that of office spaces, **significant opportunities exist to implement and standardize performance metrics** that, when combined with industry best practices, will help organizations optimize the critical, yet often overlooked, components of their portfolio.

**Technical spaces within JLL OPM portfolios**

188 MSF

- 52% 
- 24% 
- 7% 
- 7% 
- 6% 
- 1% 
- 3%

- ■ Data centers
- ■ Manufacturing
- ■ Laboratories - life science
- ■ Logistics & warehousing
- ■ Laboratories - technology
- ■ Laboratories - other
- ■ Other

# Sustainable technical spaces

Sustainability initiatives within technical spaces are becoming more common. 43% of organizations report having a sustainability program in place for their technical spaces, primarily focused on:

- **Energy efficiency (32%)**
- **Waste reduction (24%)**
- **Design efficiency (19%)**
- **Green building certifications (12%)**
- **Water conservation (12%)**

The expanded range of focus areas to drive sustainability in technical spaces reflects a growing awareness of the environmental impact of these specialized workplaces, prompting action to mitigate it.

# 04

# Hybrid work evolves to adopt more structure, governance and technological support

Our 2025 findings indicate that hybrid work adoption has begun to decelerate. **While most organizations continue to maintain a hybrid program, the share has declined from 87% to 77% over the past year**. Fewer organizations (34% in 2025 vs. 49% in 2024) are planning to expand their hybrid programs in the next three years, and 9% are now planning to reduce their hybrid programs (while no reduction plans were reported last year).

As hybrid programs mature, their strategic objectives are evolving. **Optimize space utilization** has strengthened its position as the primary goal of hybrid programs, cited by 81% of organizations (up from 77% in 2024 and 64% in 2023). **Improve employee experience** has overtaken **support workstyle changes** to become the second most important driver. Both reflect organizations' ongoing efforts to get the most out of their real estate by creating rightsized spaces with compelling environments that engage and attract employees.

## Top hybrid program objectives

| Objective | % |
|---|---|
| Optimize space utilization | 81% |
| Improve employee experience | 67% |
| Support workstyle changes | 60% |
| Reduce portfolio cost | 56% |
| Reduce real estate footprint | 31% |

## More structure in hybrid programming

Organizations are adopting more sophisticated hybrid planning, with **leadership direction** remaining the primary driver (64%) to determine hybrid program workstyles. **Utilization data** has overtaken **job functions** as the second most influential factor, reflecting the growing importance of data-driven decision-making.

There is a notable shift toward structure, with 49% of organizations now requiring a fixed number of in-office days, up from 27% in 2023. Fully flexible approaches have declined notably from 41% in 2023 to 15%.

A more structured approach creates predictable attendance patterns, fosters in-person collaboration, and addresses the midweek peak occupancy challenges common with more flexible policies.

## Greater governance and support

Organizations are also enhancing governance structures and support systems for their hybrid programs. More organizations have established **hybrid occupancy policies** to guide space planning (70% in 2025 vs. 51% in 2024). There is also an increase in organizations with a **change management program** in place to help lead hybrid working (38% in 2025 vs. 33% in 2024).

Support for hybrid planning is primarily led by corporate real estate teams (86%) and human resources (77%), with increasing involvement from IT (55%). Legal (26%) and finance (22%) play supporting roles in many organizations. These corporate functions are ideally positioned to collaborate on a holistic program that drives both immediate and lasting improvements in hybrid work adoption.

## Technology and facility changes

Investments in technology and facility modifications to support hybrid working are on the rise, most commonly including:

- **Reservation systems** (58%) essential for managing shared spaces and gathering utilization data

- **Collaboration space** (56%) to support higher demand for meeting and teamwork areas (in-person and video conferencing)

- **Minor facility modifications** (50%) such as workstation reconfiguration and new furniture to repurpose existing spaces

More organizations are now modifying **space buildout ratios** (44% in 2025 vs. 36% in 2024) and even implementing **major facility reconfigurations** such as changes to hard wall spaces (30% in 2025 vs. 17% in 2024).
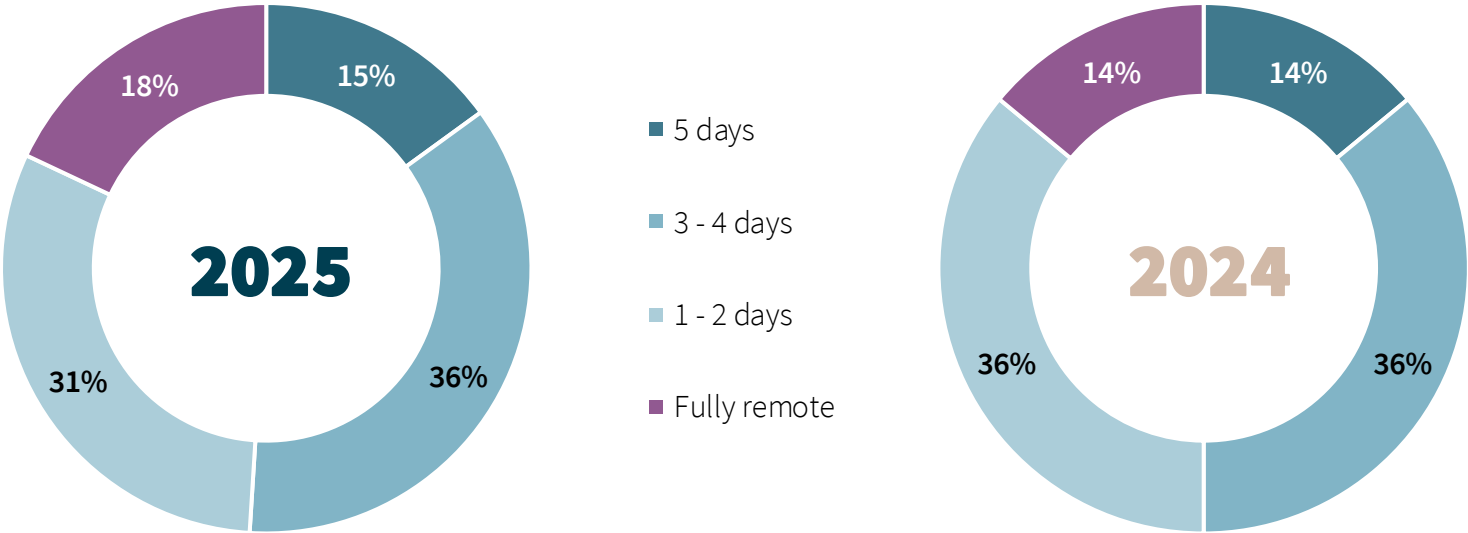
## In-office attendance frequency (actuals)

> While overall return-to-office seems to have settled into a rhythm, organizations are now more intentional in their space utilization strategies.

**2025**

- 5 days
- 3 - 4 days
- 1 - 2 days
- Fully remote

2025: 15%, 36%, 31%, 18%

**2024**

2024: 14%, 36%, 36%, 14%

## Back to office

Over the past year, 37% of organizations have increased office attendance expectations, with the remainder maintaining previous levels. More organizations now require a defined number of in-office days (49% in 2025 vs. 46% in 2024) or designate specific in-office days (19% in 2025 vs. 15% in 2024).

Return-to-office data shows just over half of employees (51%) are now back in the office three to five days per week, similar to 2024 findings. However, the share of employees visiting the office one to two days a week has declined by 5 percentage points, with a corresponding increase in fully remote staff.

This suggests some organizations may have opted to strategically re-classify infrequent office visitors as remote workers to optimize seat allocation. While overall return-to-office seems to have settled into a rhythm, organizations are now more intentional in their space utilization strategies.
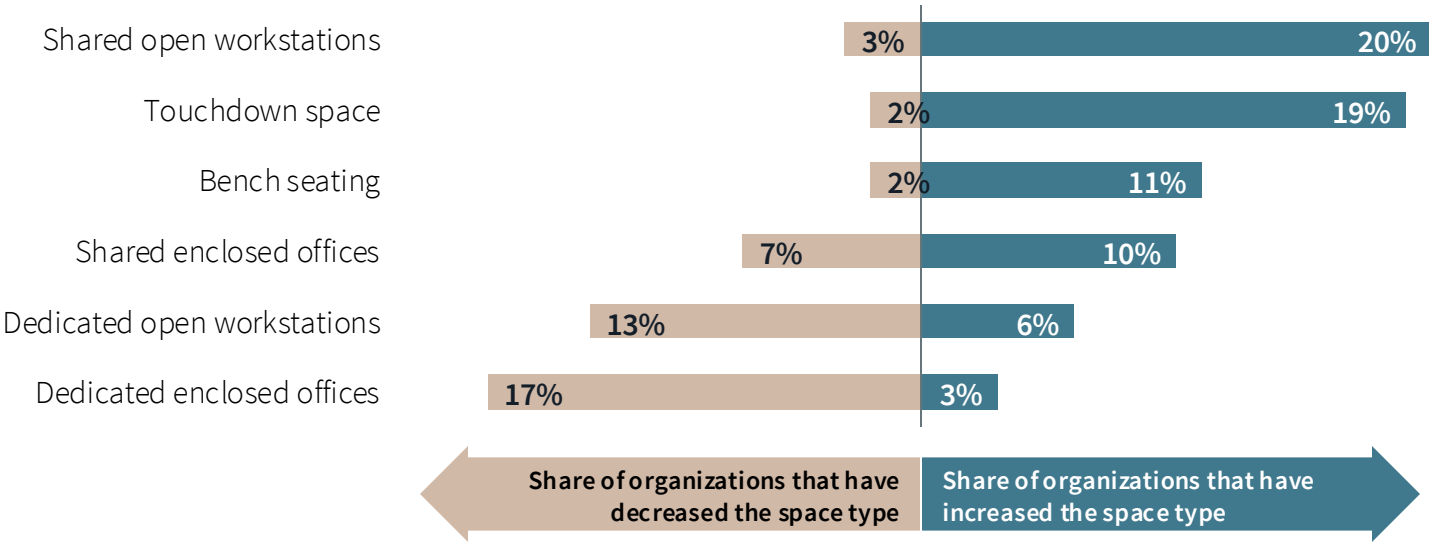
# 05

# Individual workspaces continue to shift toward more desk sharing and higher density standards

Reflecting trends accelerated by the widespread adoption of hybrid work, organizations have continued to evolve their workspace allocations, shifting from permanent, assigned spaces to agile seating. **Shared open workstations, touchdown space and bench seating have become more prevalent, while dedicated offices and workstations have seen the most reduction**.
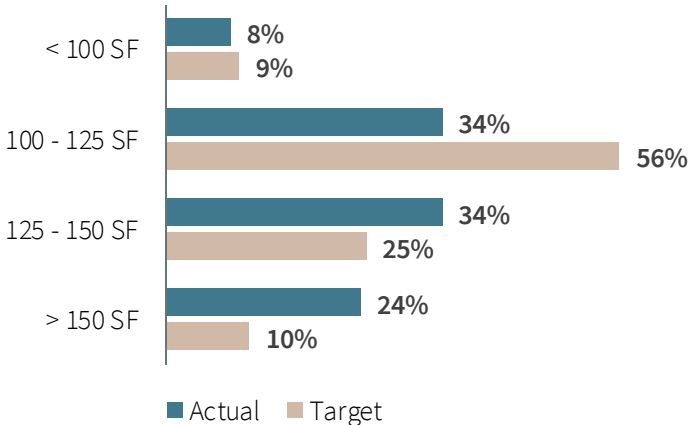
As utilization targets continue to rise, organizations are aiming to increase **seat sharing ratios** from an average of 1.1 people per seat currently to 1.3 per seat, as well as improve **density metrics** from 165 s.f. per person to 132 s.f. per person (or from 164 s.f. per seat to 151 s.f. per seat). More aggressive approaches such as 100% agile seating could further increase flexibility and reduce per-employee occupancy costs.

## Changes in allocation of individual workspaces over the past year

| Space type | Decreased | Increased |
|---|---|---|
| Shared open workstations | 3% | 20% |
| Touchdown space | 2% | 19% |
| Bench seating | 2% | 11% |
| Shared enclosed offices | 7% | 10% |
| Dedicated open workstations | 13% | 6% |
| Dedicated enclosed offices | 17% | 3% |

**Share of organizations that have decreased the space type** | **Share of organizations that have increased the space type**

## Size standards for enclosed offices*

| | Actual | Target |
|---|---|---|
| < 100 SF | 8% | 9% |
| 100 - 125 SF | 34% | 56% |
| 125 - 150 SF | 34% | 25% |
| > 150 SF | 24% | 10% |

■ Actual  ■ Target

## Size standards for open workstations*

| | Actual | Target |
|---|---|---|
| < 35 SF | 32% | 36% |
| 35 - 50 SF | 35% | 42% |
| > 50 SF | 32% | 22% |
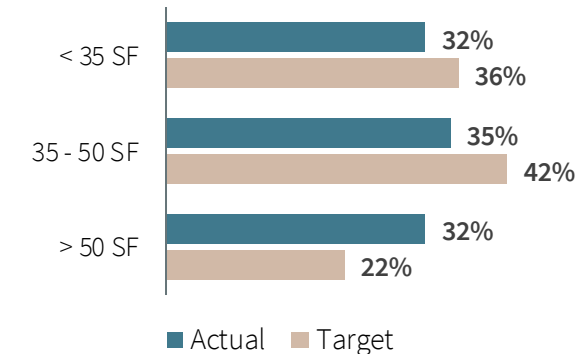
■ Actual  ■ Target

*Percentages denote share of organizations with actuals or targets in the respective size ranges.

In addition to adjusting allocation strategies, organizations are also shifting their space size targets. Most organizations (78%) report having defined standards for space functions to guide workplace planning, actively working toward smaller, more standardized sizes for office and workstations.

However, many have not yet fully implemented these changes across their portfolio. For enclosed offices, 65% of organizations are targeting size standards of 125 s.f. or smaller, compared to 42% currently at such standards. Conversely, 24% of organizations have offices averaging 150 s.f. or larger, with only 10% targeting this size range. Similar gaps exist for open workstations, with 78% targeting sizes under 50 s.f., while only 67% have met these targets.

These findings underscore that **significant opportunities remain for space and portfolio optimization**, as organizations actively implement workspace standardization and rightsizing to drive efficiency, support hybrid work and position for long-term success.
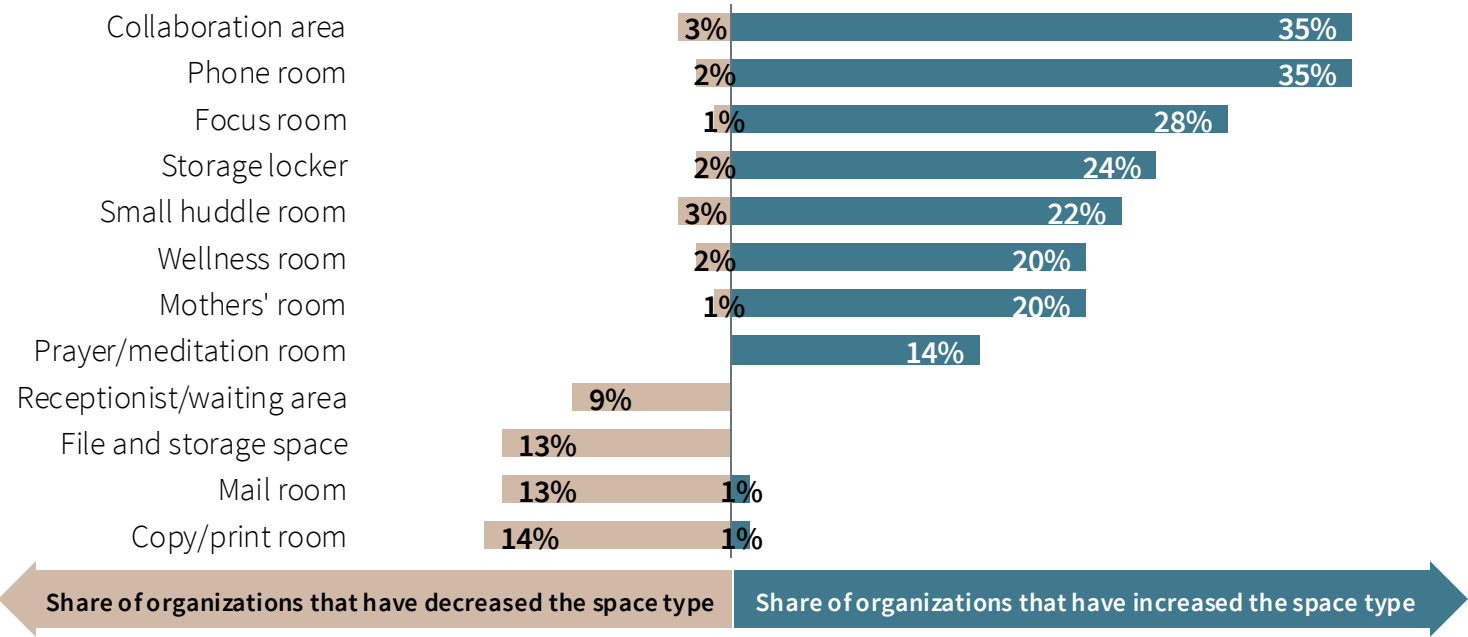
# 06

# Dual focus on collaborative and individual work enhances engagement and productivity

Organizations are adjusting their allocation of shared amenity and function spaces—expanding some while reducing or repurposing others—to better support work preferences and wellness needs.

While maximizing space utilization remains a priority, it is vital to create high-performing environments that enhance both work productivity and human experience. Notably, **organizations are recognizing the dual role of the office in hybrid environments —both as a collaboration hub and as a space for the focused work that remains essential for most employees.** An effective mix of these space functions works to support an engaged and productive workforce.

## Changes in shared amenity and function spaces over the past year

| Space type | Decreased | Increased |
|---|---|---|
| Collaboration area | 3% | 35% |
| Phone room | 2% | 35% |
| Focus room | 1% | 28% |
| Storage locker | 2% | 24% |
| Small huddle room | 3% | 22% |
| Wellness room | 2% | 20% |
| Mothers' room | 1% | 20% |
| Prayer/meditation room | | 14% |
| Receptionist/waiting area | 9% | |
| File and storage space | 13% | |
| Mail room | 13% | 1% |
| Copy/print room | 14% | 1% |

← Share of organizations that have decreased the space type    Share of organizations that have increased the space type →

As such, organizations are expanding and enhancing spaces for focused work, small-group collaborations and large team gatherings—enabling employees to seamlessly transition between interacting with others (in-person and virtually) and concentrating on heads-down work without interruption.

## Collaboration space

**Collaboration space** was the space type most commonly expanded last year (35%), while **small huddle rooms** are also on the rise (22%), as organizations amplify their support for diverse modes of connectivity and teamwork.

## Health and cultural spaces

To foster physical and mental health in the office, organizations are adding **wellness areas** (20%), **mothers' rooms** (20%), and **prayer and meditation spaces** (14%), alongside **ergonomic furniture** (sit-to-stand desks are now standard in new buildouts for 77% of organizations).

Additionally, the rise in workplace health and cultural spaces reflects a global focus on employee wellness needs. As these needs are easily accommodated at home, organizations emphasizing office attendance must provide comparable onsite facilities to support employees' daily wellness routines.

## Focus space

To better support concentrated work, private conversations and video conferencing, many are adding **phone rooms** (35%) and **focus rooms** (28%), directly addressing a top pain point from employees about open-plan offices.

## Business support spaces

Traditional business support spaces such as **copy and print rooms** (14%), **mailrooms** (13%), and **file and storage areas** (13%) are declining as digital workflows reduce the need for physical document handling as well as the environmental waste associated with mass printing.

"

*A successful real estate strategy starts with an effective data strategy. Organizations with advanced and predictive data capabilities gain significant advantages in pattern identification, space allocation, and ultimately portfolio optimization.*

*Organizations that take a data-driven, holistic approach to workspace design and management—one that balances efficiency goals with human experience considerations—will be best positioned to create environments that drive both productivity and engagement.*

**Wei Xie**
Global Head of Research & Strategy
Workplace Management, JLL

# Methodology

The **JLL Global Occupancy Planning Benchmark Report** is an annual series that examines key trends in occupancy planning, real estate strategy and workplace design, offering insights into organizations' portfolio adaptations across various regions and industries to support evolving work patterns and business objectives.

We ask prominent corporate and commercial real estate leaders from around the world to answer more than 120 detailed questions about their space utilization, driving valuable insights into workplace benchmarking and occupancy strategies.

This report is intended to provide guidance and inform decisions for occupancy planning and wider CRE strategies. It is not intended to serve as a space utilization calculator as metrics and calculations vary greatly based on organizational requirements, policies and specific work activities.

The 2025 report draws upon a global survey of 99 organizations (an increase from 84 in 2024) that provided a total of 205 region-specific responses. Collectively, the surveyed organizations represent more than **745 million s.f. of commercial real estate portfolios worldwide**.
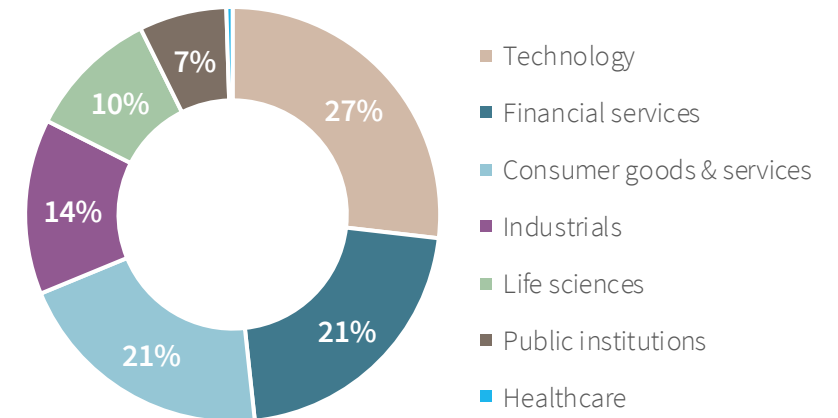
The surveyed organizations encompass a broad spectrum of geographical locations and industry sectors, which helps deliver nuanced and differentiated data to show how geopolitical and economic drivers, industry trends and workforce patterns uniquely influence real estate strategies across varying contexts.

We welcome your feedback on this report and invite you to contact our global or regional occupancy planning and management experts to discuss how these insights may apply to your specific organizational context and objectives.

## Responses by region



- North America — 40%
- APAC — 25%
- EMEA — 19%
- Latin America — 16%
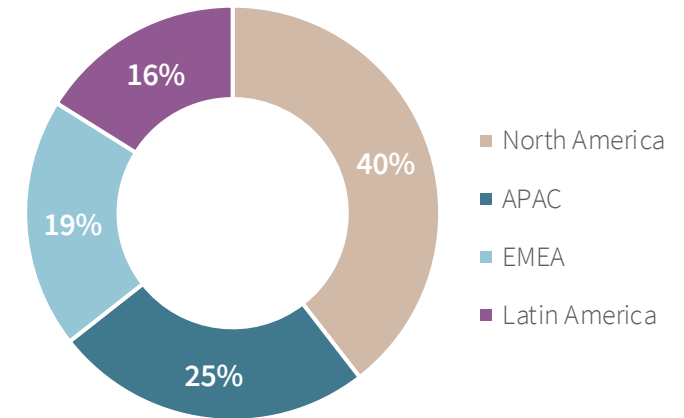
## Responses by industry vertical



- Technology — 27%
- Financial services — 21%
- Consumer goods & services — 21%
- Industrials — 14%
- Life sciences — 10%
- Public institutions — 7%
- Healthcare

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## Research at JLL

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