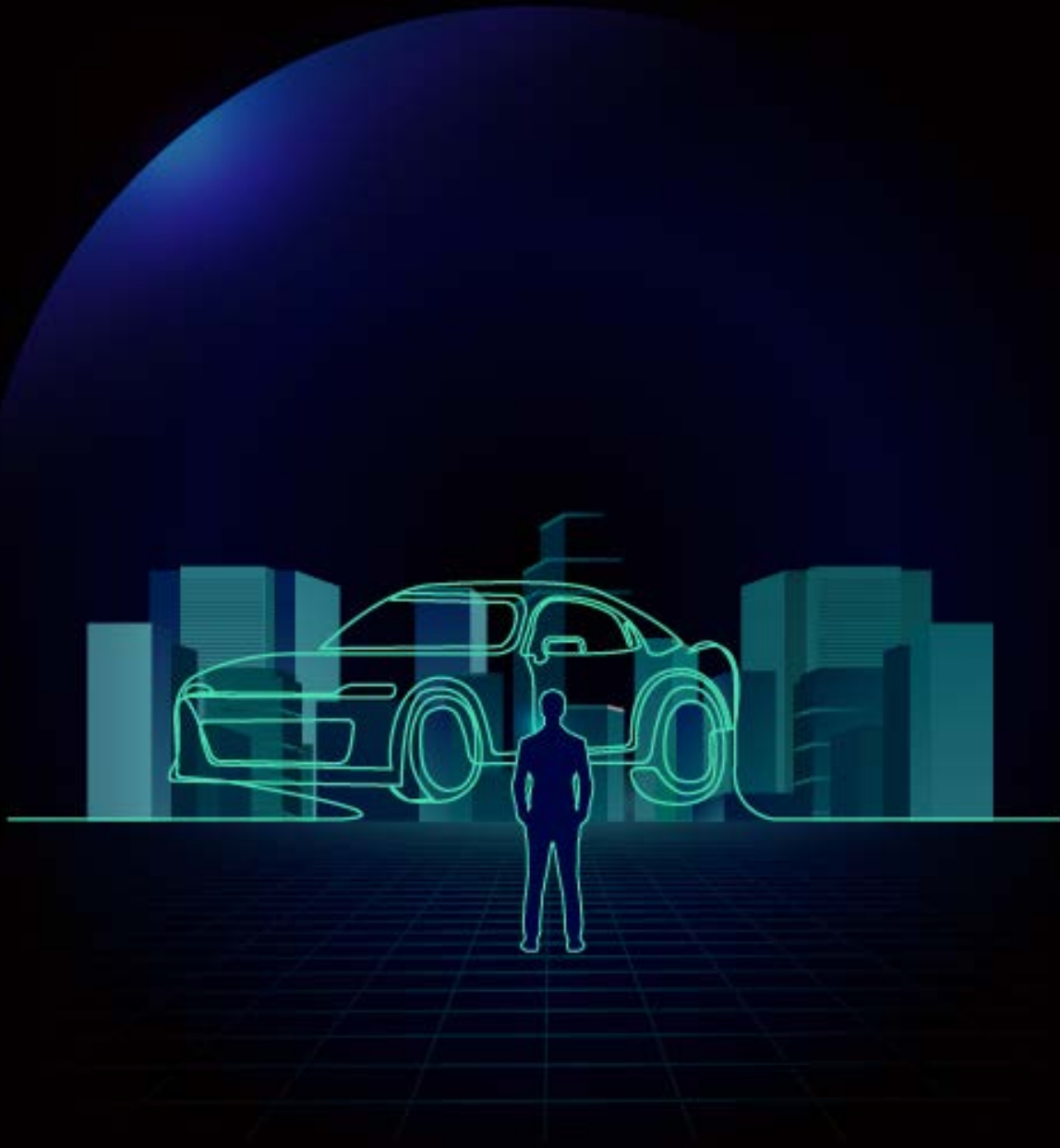


**Deloitte.**



How mobility is driving  
the future of real estate



Historically, real estate and employee travel were largely separate matters, but COVID-19 prompted employers to explore alternative ways of working, which will have significant real estate implications. Now, organisations are rethinking their mobility choices, including alternative modes of travel, or taking the office to the workforce. Here, we examine how mobility is changing, and transforming from an employee benefit into a cornerstone of how organisations operate and make their real estate decisions.

## Driving forces: navigating mobility in a post-pandemic world

The pandemic revealed many mobility options that could be adopted, but three drivers now make it imperative that they should be considered.

First, **imminent reporting legislation**, such as the EU's CSRD and for example in the Netherlands' work-related personal mobility (WPM), make organisations accountable for the CO<sub>2</sub> emissions from their buildings and employee travel, including commuting. Current research shows that 78% of organisations are concerned about the business impact of such reporting requirements, and 84% still lack the necessary data.

Second, **sustainability** (CSR and ESG) policies – which go beyond the statutory minimum – are increasingly being demanded by stakeholders, including shareholders, society (where travel occurs), and clients or suppliers who want to deal with sustainable organisations.

Third, present and future **employees** now have many options for balancing their lives, affecting where they work, how they get there, and the time it takes. Mobility will therefore be key to retaining and attracting talent – especially recent generations who, according to [Deloitte's research](#), are more attracted to employers offering remote or flexible working. Furthermore, new talent also favours organisations with clear and credible sustainability practices.

## Real Estate and mobility; finding balance

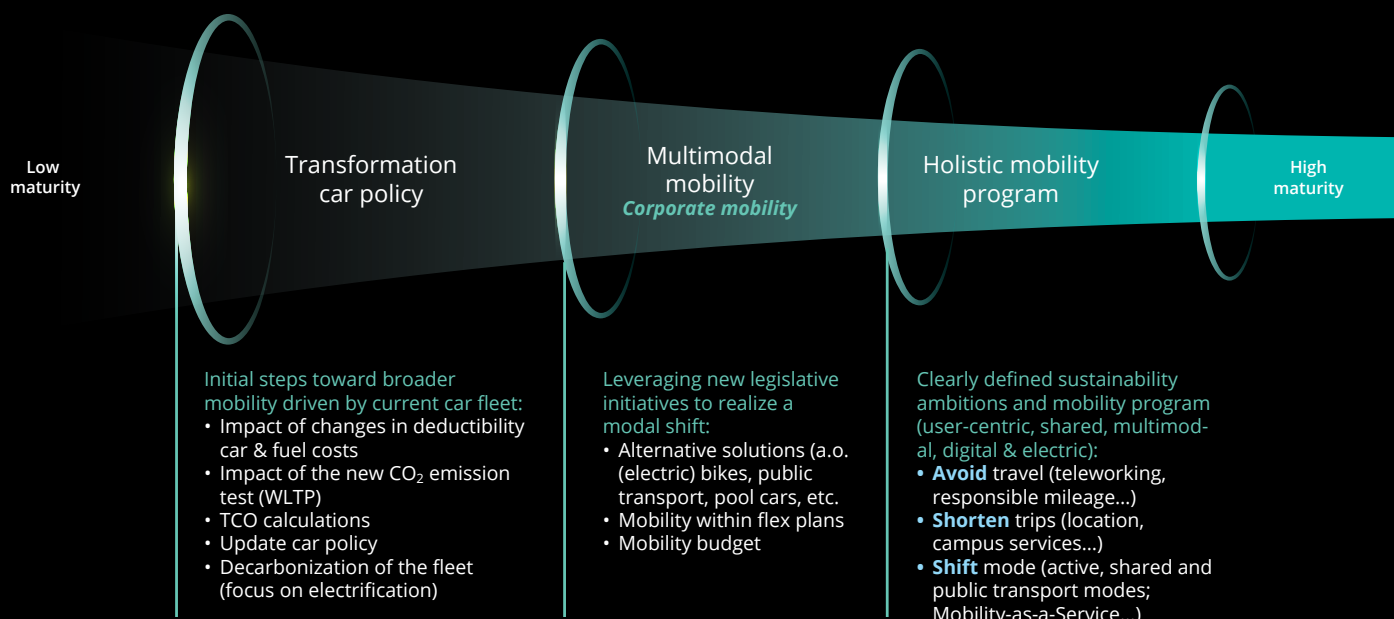
No single strategy will suit all organisations, but each one must recognise that real estate and mobility are becoming connected, and make the right choices to balance talent, sustainability, and costs.

For example, allowing employees to work remotely two days a week reduces the financial and environmental costs of both commuting and office space, and is more attractive to new talent. On the other hand, employers such as major player in the global semiconductor industry reported innovation to be lower during the pandemic, while a well-known sportswear brand attracts staff to its campus, with high-quality sports facilities.

While remote or hybrid working can satisfy employee expectations, and reduce the need for traditional office space, we also expect it to *increase* the demand for non-traditional space, for teaming, collaboration and co-working. Businesses must therefore improve their understanding of how traditional, non-traditional and home working spaces are used, and the associated costs.

Wherever employees work, their employers will become responsible for reporting on their travel (and thus emissions), and a widespread return to office working could increase the impact of such travel. Many employees moved further from the office during the pandemic, so the longer commute would increase road traffic, or put greater pressure on public transport. Most corporates are therefore aiming to expand their mobility options, reduce car fleets, and incentivise more sustainable behaviours.

The diagram below illustrates how organisations are rethinking their mobility options. Some focus on the company car (or allowance), as an employee benefit. For others, mobility is changing organically, to include alternatives such as bicycles or public transport allowances. The most mature organisations are taking a more deliberate approach, and transforming from employee travel benefits to a holistic mobility programme that embraces multiple modes of both travelling and working.



Arriving at the right solution involves many considerations, and we have identified six building blocks for developing a mobility strategy, as illustrated below.



**01 VISION & PRINCIPLES**

- Vision
- KPIs
- Guiding Principles
- Clear narrative of the purpose
- Fit in Reward strategy



**02 COST/DATA ANALYSIS**

- Geographical data
- Demographical data
- Work regime data
- Cost data
- Employee needs and preferences



**03 MOBILITY SOLUTIONS**

- (Electric) Car / Fuel
- Train / Bus
- (e-) bicycle (lease)
- Carpool / Pool car
- Remote work / Flex hub
- Parking



**04 TOOLS & ENABLERS**

- Parking / mobility apps
- Mobility Platform
- Hardware



**05 POLICIES & PROCEDURES**

- Car / mobility policies
- Supporting processes



**06 COMMS & ACTIVATION**

- Assist to facilitate the change throughout the entire organization (e.g. campaigns, incentives, ambassadors, trainings HR / business)

## Mobility strategy; vision, costs and integration

An important starting point is to understand the organisation's vision and priorities, including facilities, HR, finance and sustainability perspectives. Our experience suggests that HR and sustainability functions usually lead this conversation, while real estate has traditionally been the driver when an office move is involved. However, a holistic approach must consider real estate as an increasingly important element in any mobility strategy.

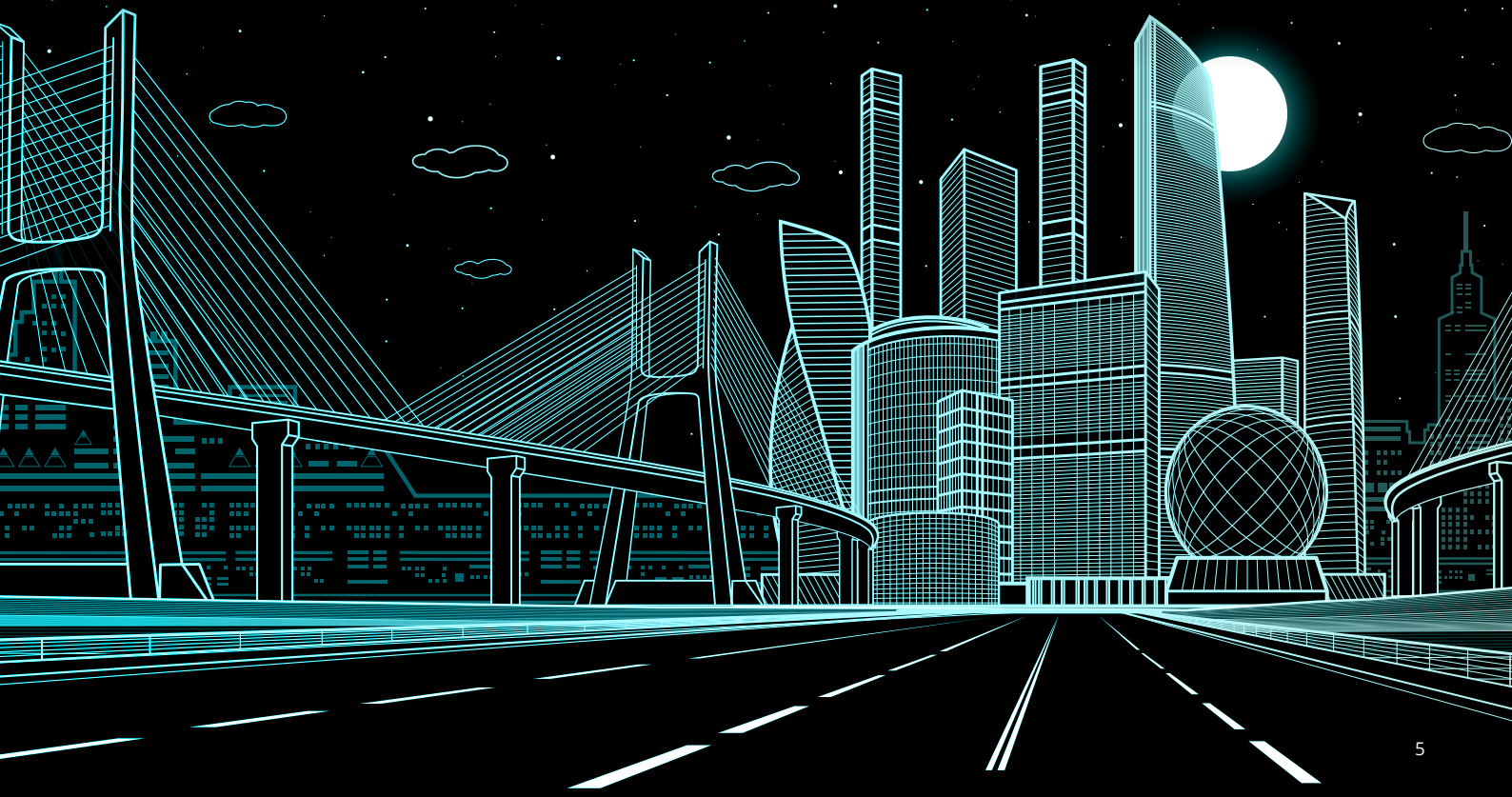
Evaluating current and future scenarios requires the right information. Even when organisations can measure their real estate needs, it's also important to establish data on mobility patterns and costs. In the Netherlands and Belgium, new mobility solutions are emerging and maturing, along with policy initiatives such as tax incentives or low-emission zones, so good data (including CO<sub>2</sub> and financial costs) helps to quantify each option. For example, even if the total cost of ownership for a company car scheme is known, mobility data should also reflect the range of other options.

With these three considerations – vision, costs, mobility options – in place, an organisation is well-placed to make informed decisions about its mobility programme, and identify the enablers that will make the vision a reality. Software tools – such as videoconferencing or mobility as a service – can support multimodal working, but the office itself can also be an enabler.

**Organisations must fundamentally shift their thinking, from mobility being a service for a given office location, to real estate being one component in a broader mobility strategy.**

That role might involve office location and construction, or building new facilities such as EV charging, bicycle storage, or showers.

To put it into practice, the mobility strategy should be enshrined in policy and – importantly – communicated. Working patterns are often being central to employees' lives, so this might require significant behavioural change. Effective leadership is essential: not simply with launch announcements, but also through active and sustained demonstration, with leaders visibly adopting new work and travel behaviours themselves.



These changes are already happening. For example, AWWN, the Dutch employers' association, reports that 85% of its members are working to 'green' their employment terms, and half have already enshrined such changes in their collective agreements. Deloitte Belgium's mobility strategy cut its fleet (which represented 69% of its total CO<sub>2</sub> emissions before the new mobility programme was rolled out) by 700 cars, and reduced its overall CO<sub>2</sub> footprint by more than 30%. A large telecom company incentivised

cycling and walking with travel allowances that exceed not only the company's car allowances, but also the country's tax-exempt maximum, while another major telco now promotes an initiative to 'drive less, drive greener.' Acting now can help your business start reaping early commercial benefits, and demonstrate social responsibility, rather than simply reacting to legislation.

The six building blocks will help any organisation, in any country, develop a mobility strategy that balances its environmental, financial and talent needs. Whether your business aims to be a leader in sustainability, or simply keep up with legislation, mobility is now a priority, which can offer strategic benefits for talent and real estate.





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