



THE WORKPLACE OF THE FUTURE

July 2018
CHANGING REAL ESTATE NEEDS

CBRE

KEY INSIGHTS



Further insights available at:

cbre.co.uk/research-and-reports

and cbre.co.uk/workplace-emea

PERMANENT DISRUPTION AND IMPLICATIONS

TODAY'S RIGID BECOMES TOMORROW'S FLUID. 2040 WILL BE AN AGE OF PERMANENT CHANGE, WITHOUT THE FRICTION.

Talent, buildings, services, goods – will be available **on demand**.

Open attitude towards **sharing**, even among competitors

Fixed locations are luxury “reward” points as are home offices, right down to brand, lighting etc.

Flexible, modular, adaptable
buildings

Shorter and more **flexible leases**



PERMANENT DISRUPTION AND IMPLICATIONS

Place matters
more, not less

Location decisions
driven by quality
and authenticity of
experience

Space needs to
convey brand,
culture and
belonging,
everywhere



Incheon, South Korea

Smart buildings,
places and cities

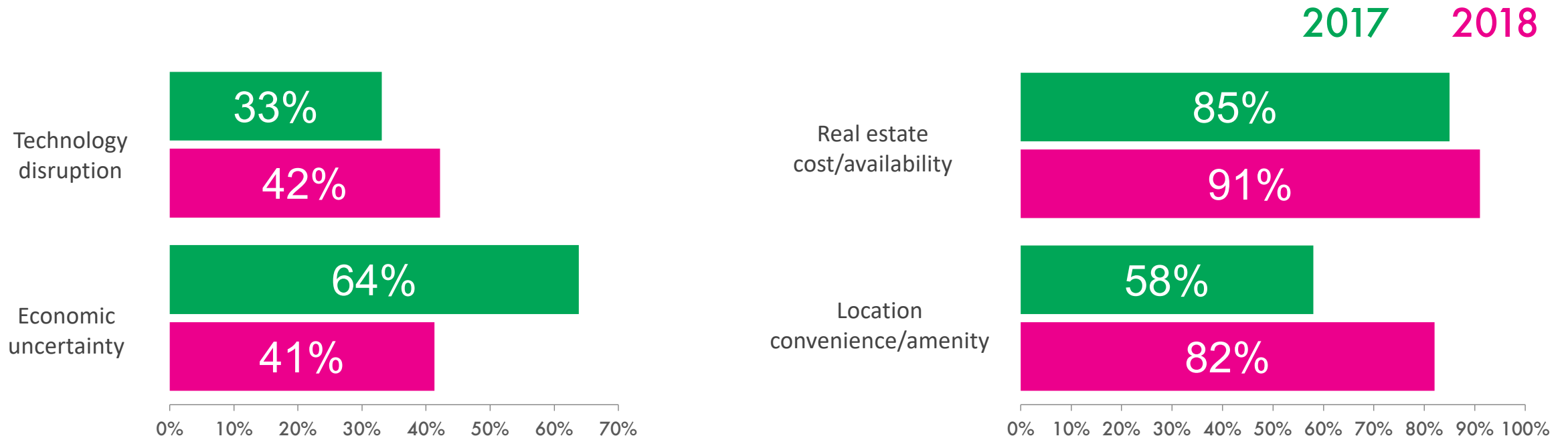
Companies
reinvented as data
houses

Balance high-quality
workplace experience
with tech-enabled
working platforms

All leases will be
green leases; more
transparent
accreditation; urban
farms

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WHAT'S OCCUPYING THE OCCUPIER?



98%

of firms **do not expect** Brexit to have a significant impact on their employment levels



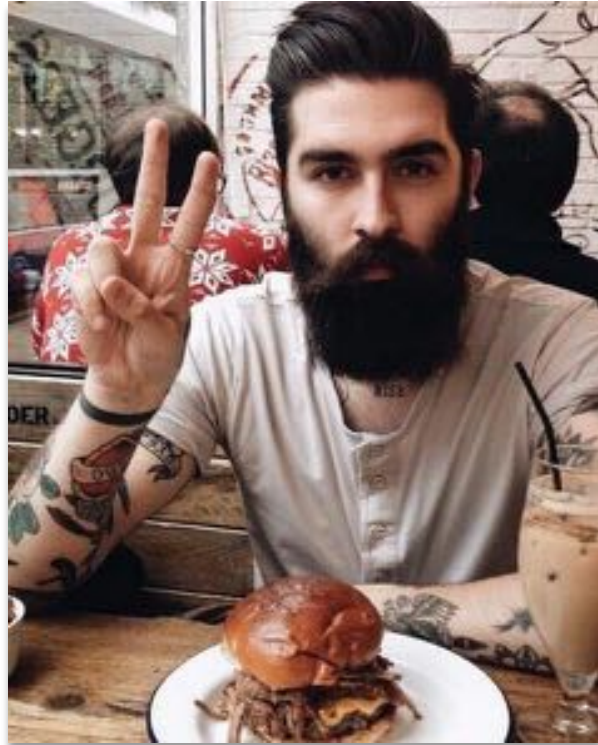
70%

of firms have no contingency plan to relocate business elsewhere in Europe

95%

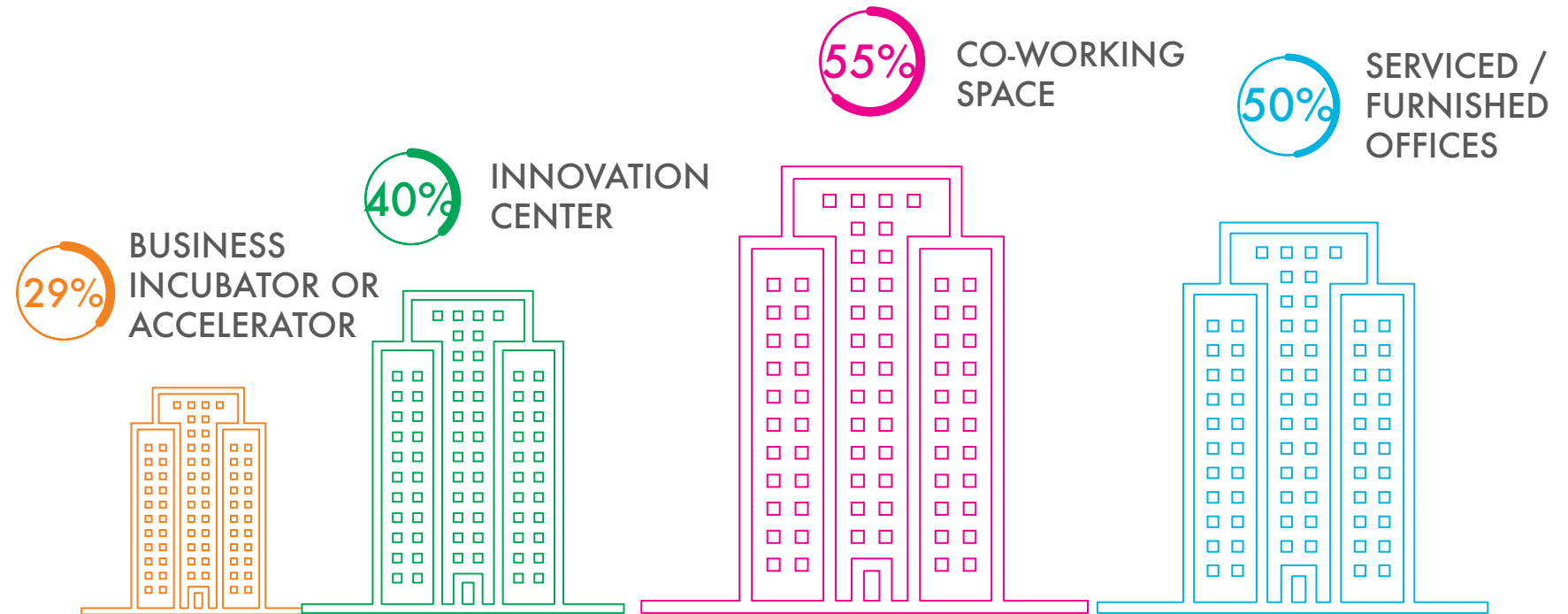
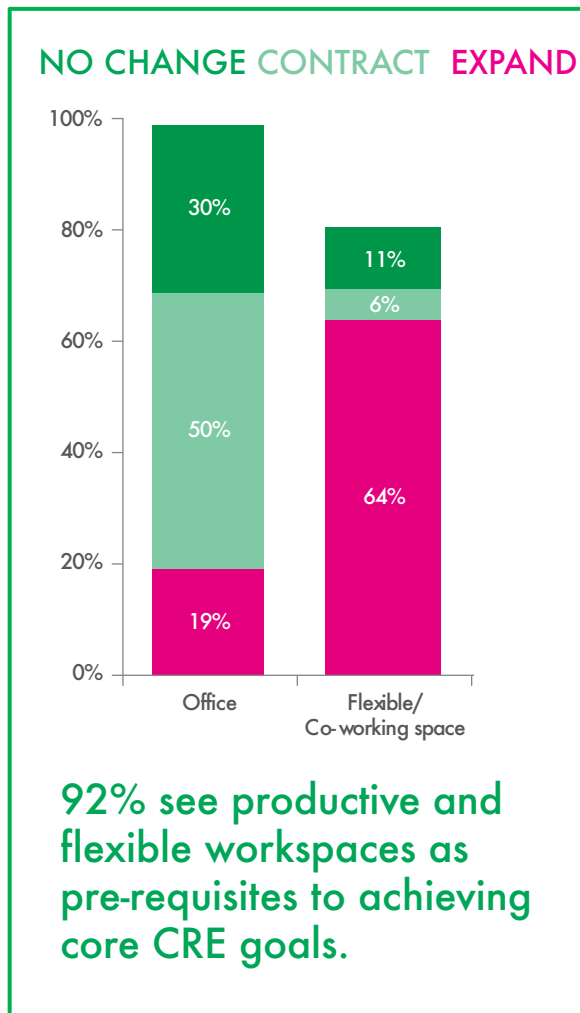
of firms **do not expect** Brexit to have a significant impact on their profitability levels

LONDON LANDSCAPE



ONE SIZE DOESN'T FIT ALL

APPETITE FOR DIFFERENT TYPES OF FLEXIBLE SPACE



DIGITISED TALENT

DATA MAY BE THE NEW OIL, BUT TALENT IS THE TANKER.

More than **50%** of employees are contingent workers; many job descriptions no longer specify a location

Technology enables **remote working** to the extreme, including widespread use of holograms and avatars

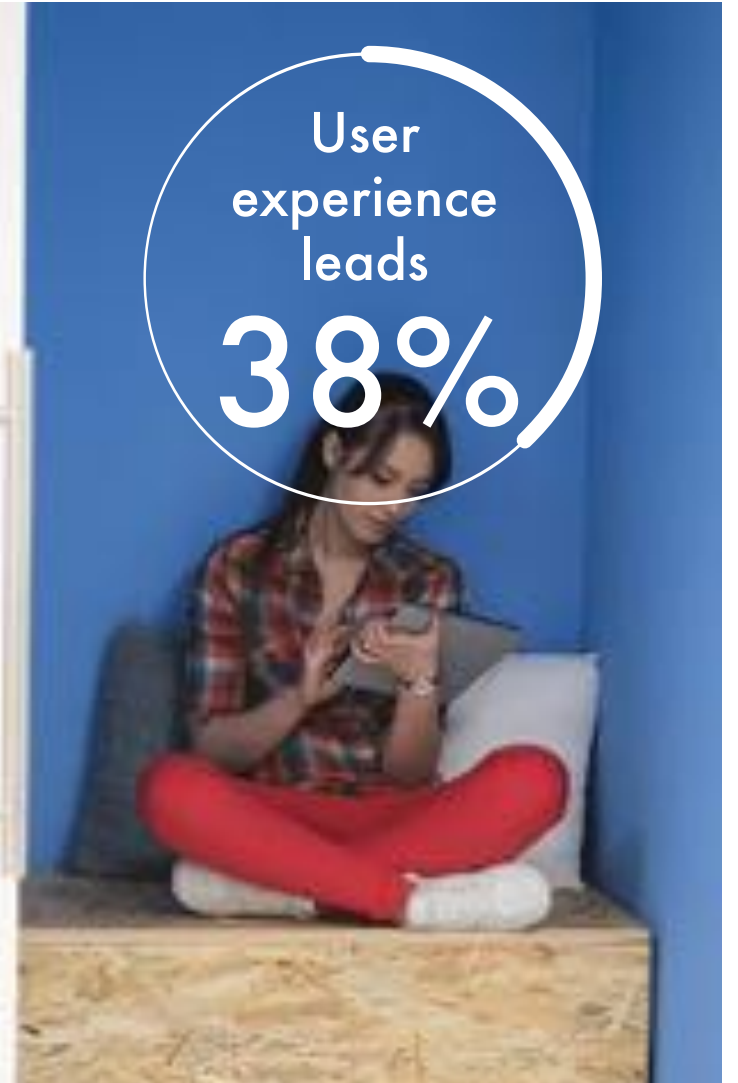
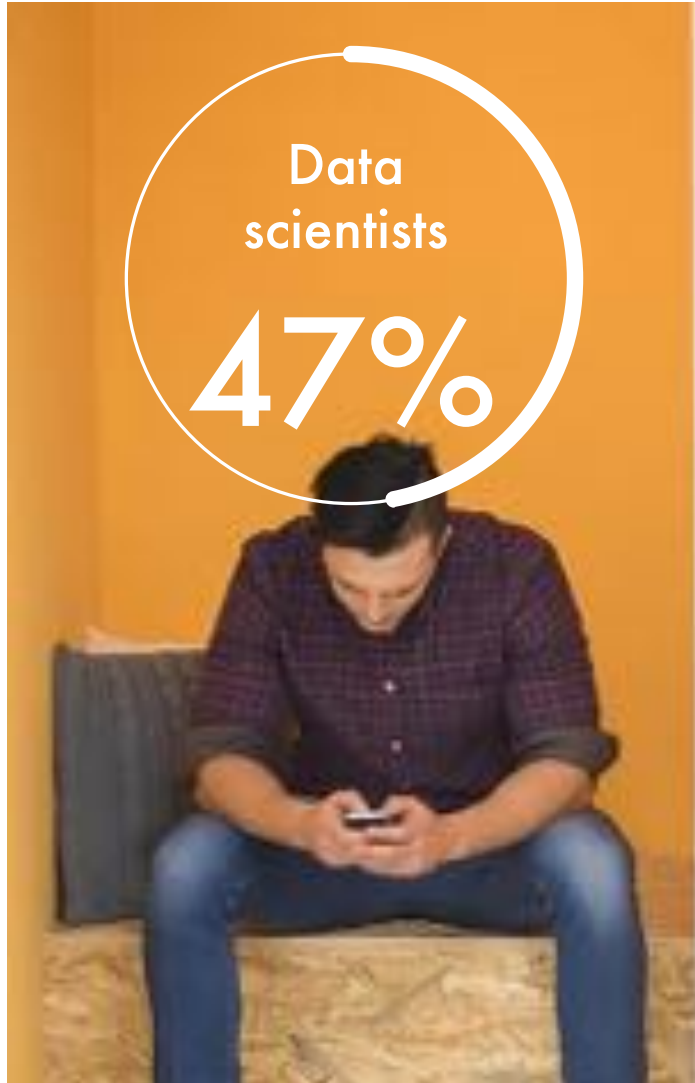
While technology is pervasive, **people remain critical** to business.



BABY – BOOMERS
Brokers, Specialist

MILENIALS & BEYOND
Consultants, Generalist

NEW SKILLS REQUIRED



BUSINESSES CARE ABOUT



**SPACE
EFFICIENCY**
47%

workplace & space efficiency
programs for portfolio
flexibility

**INCREASED
AGILITY**
10

year facility life cycle
upgrade technology
every 2-3 years.

**EFFECTIVE
COLLABORATION**
69%

better collaboration – a
main driver of their
workplace strategies.

**TALENT
MANAGEMENT**
51%

workplace as a lever to
attract & retain talent
differentiator from
competitors.

**WELLNESS
PROGRAMMES**
80%

have a wellness programme
or plan to introduce one.

**WELL
BUILDINGS**
92%

have preference for wellness-
capable buildings.

EMPLOYEES CARE ABOUT



**COMPANY
CULTURE**
47%

company culture extremely important when selecting an employer

**WORK
FLEXIBILITY**
38%

more engaged when organisations provide work-life support.

**EMPLOYEE
WELLBEING**
69%

of millennials agree that wellness facilities are influential when taking a new job.

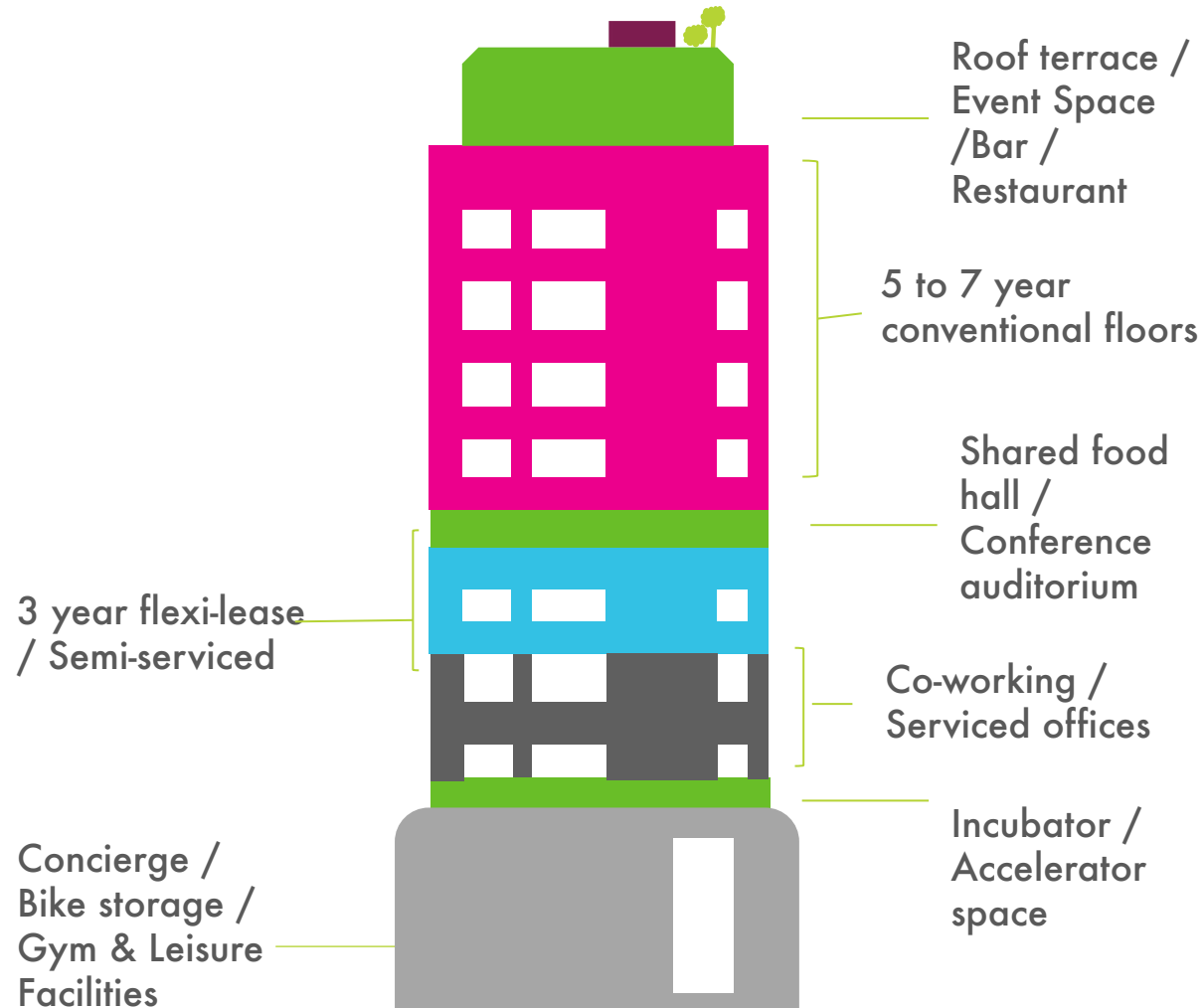
**EASE OF
WORK**
44%

the latest technology to enable them to effectively do their job

ADJUSTING NEEDS

“Faced with the option of two similar buildings... we would always choose one with a flexible offer...”

Global Real Estate Director,
Professional Services Occupier



Workplace is much more than demised office space

British Land

DECODING EXPERIENCE



SMART FEATURES



USER JOURNEYS



CONVERSATION ROOMS



ACTIVE CLIMATE CEILING



SEMI PRIVATE SPACE



CONNECTED AV



POE CONNECTED LED



PERSONAL CLIMATE API



CONNECTED MEETING ROOMS



CONCENTRATION SPACE



ATRIUM OPEN SPACE

SMART FEATURES



ACTIVITY BASED FULL FLEX



CONNECTED LOCKERS



3D USER INTERFACE



WIRELESS CHARGING



INTERACTIVE ART



CONNECTED COFFEE



CONNECTED FITNESS



CONNECTED FOOD APP
ROOMS



CONNECTED RESTAURANT



CONNECTED SECURITY

Smart buildings

Disruption

TALENT

PLANNING FOR
UNCERTAINTY

Peer
review

REAL ESTATE
COSTS

WORKPLACE OF
THE FUTURE

TECHNOLOGY

Generational requirements

FLEXIBILITY

Space
modelling

Flex
planning

Redefining space needs

WELLNESS -
ROI

INFLUENCING THE TRADITIONALISTS

// **CHANGE-MAKING**
HAPPENS WHEN **PEOPLE**
FALL IN LOVE
WITH
A **DIFFERENT** //
VERSION
OF **THE FUTURE**

SETH GODIN





THANKYOU

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