



# European opinion qualitative survey

Cross-country Report

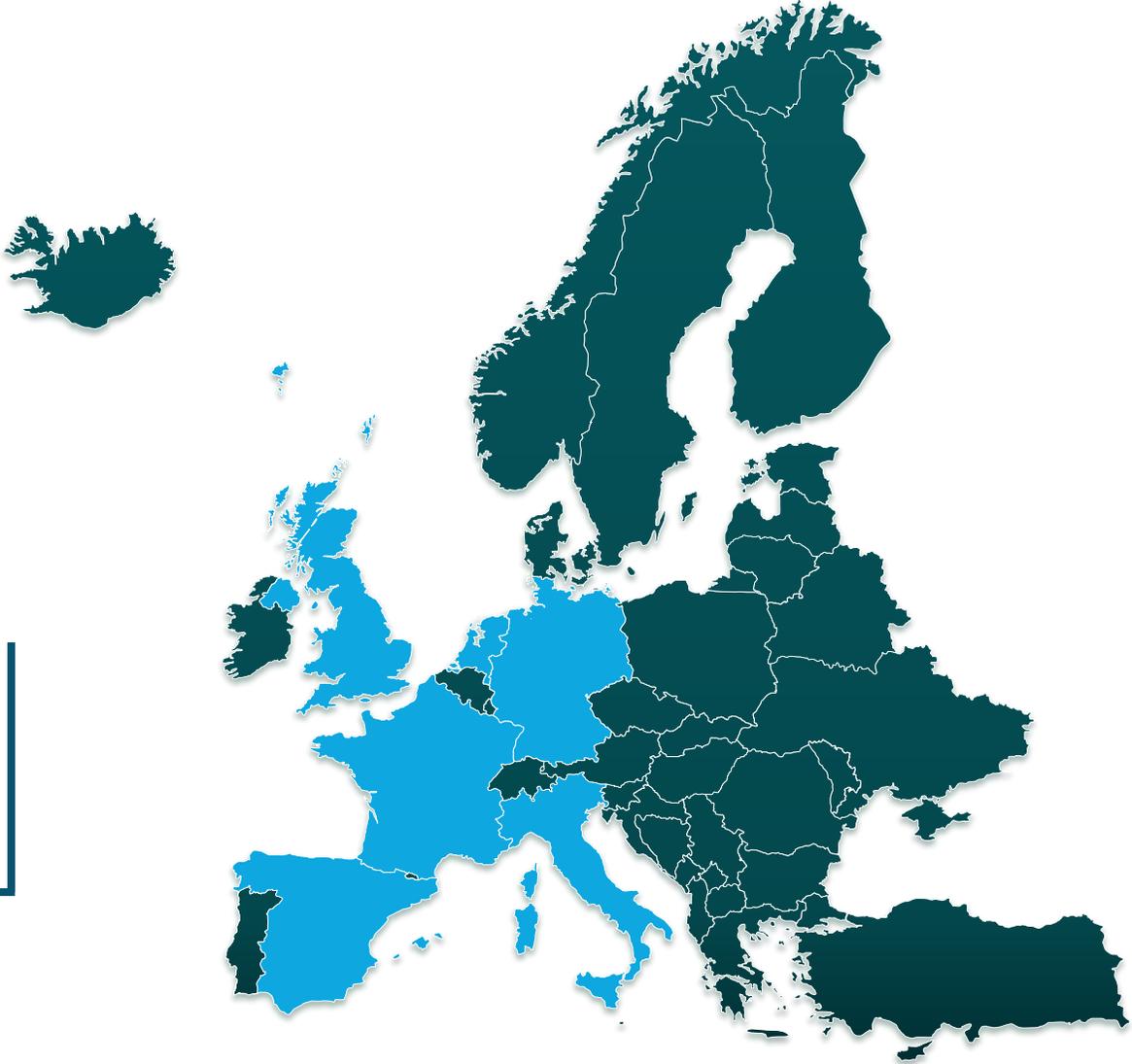
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March 2019

# Pan-European Innovation & CSR Think-Tank

- A think-tank **launched in December 2017** to **foster collaboration** among European office real estate players
- **6 REITs in 6 different countries**



# Objectives of the “ European opinion qualitative survey”

The first pan-European series of focus groups with office end-users

## 1 Understand end-users’ vision of offices in 2030 :

- ? How will the **organization of workspaces** evolve?
- ? Which **function – use & service** – for tomorrow's office building ?
- ? Which **challenges** for office **real estate sector** in the next few years?

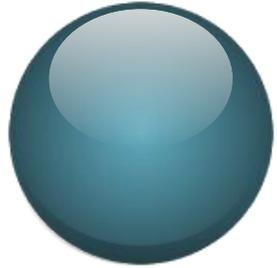
## 2 Generate fresh, innovative ideas about the professional **workspace**



- The results of the survey solely reflect the opinions of office end-users, and not that of the REITs who commissioned the survey
- The opinions concern the entire office market and are not limited to the office portfolio of the 6 REITs
- Some items which interviewees are wishing for are already happening, the future is here

# 3 fundamental drivers will define the ways of working in 2030

The first pan-European series of focus groups with office end-users

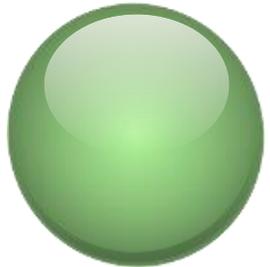


## Sociological drivers

- Hyper-connectivity leading to less human contact or face-to-face meetings
- Need for well-being & socialization
- Increase in individualism, with the rise of independent workers



The role of the company office will evolve to respond to workers' needs to have **meetings, collaborate, socialise and feel fulfilled at work**



## Environmental drivers

- Rise of sustainable buildings (zero-net-energy buildings)
- Evolution of transport (public transport, electrical cars, pods, hyperloop, carsharing)



In the future, people will be much more demanding and much more questioning in terms of what a potential employer will be doing to **tackle climate change**



## Technological drivers

- Embedded technology exploiting bio-metrics and all-in-one devices
- "Auto/Self technology" through robotization and digitization
- Holograms replacing human interactions

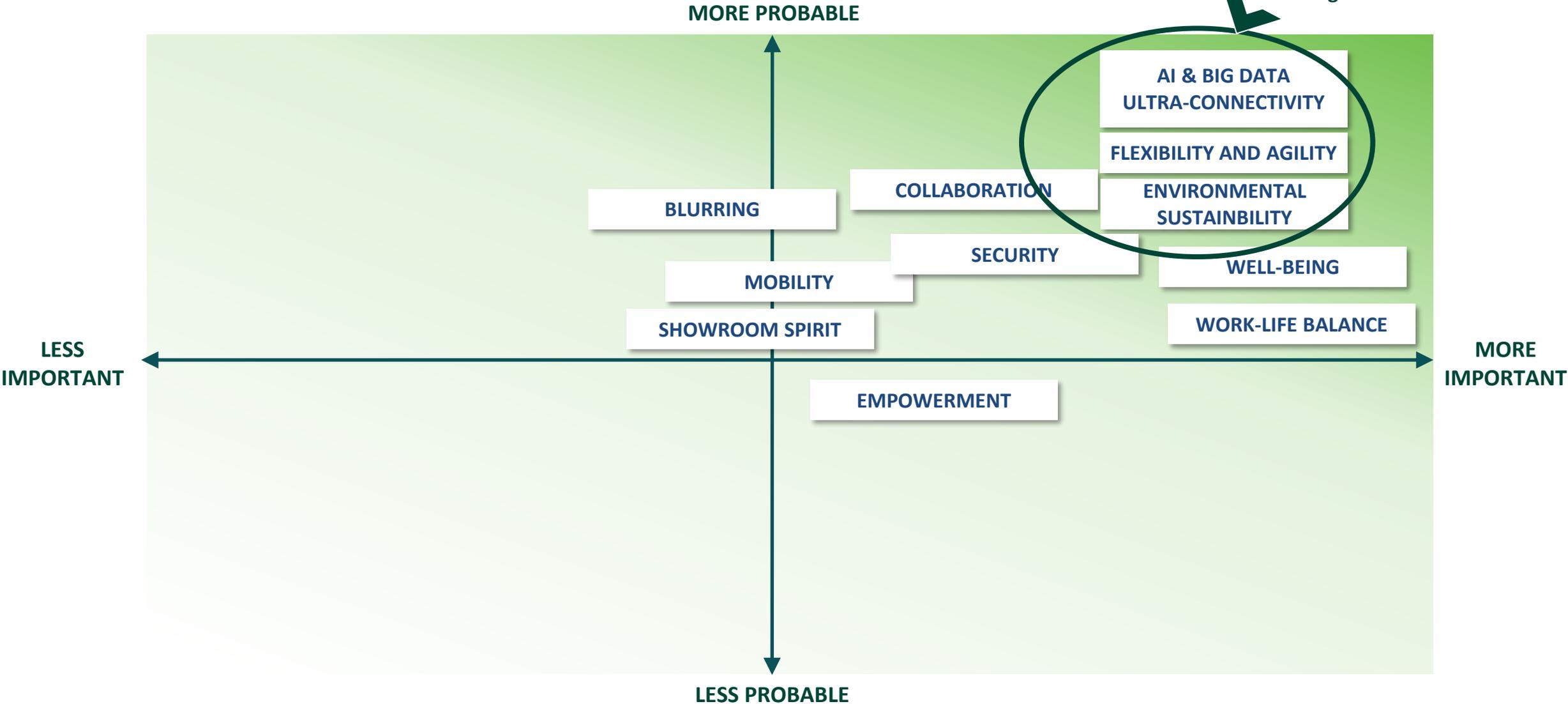


AI, Big Data, robotics, hyperconnectivity... affect **the way people work and connect** as well as the organization within the companies

# Key trends expected to determine office spaces in 2030



The most probable and important according to interviewees



# Key takeaways of the study

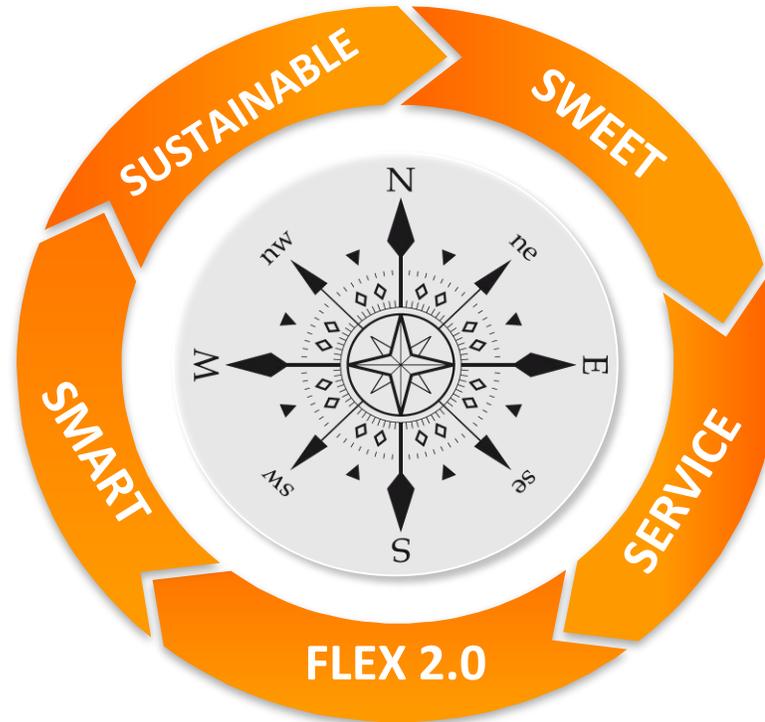
Based on the focus groups carried out, end-users expect future offices to be a combination of the 5 following archetypes

## SUSTAINABLE OFFICE

- More **sustainable and natural building materials**, incl. solar panels & energy windows
- **Sensor-enabled** workspaces for **energy efficiency** optimization
- Spaces that encourage a **green conscience** among employees (vegetal walls & plants, rules on waste reduction, local green food...)

## SMART OFFICE

- **Mobile office** : ubiquitous access regardless of physical space (in/out of the office)
- **Seamless network access** enabled by WiFi-friendly, non-blocking materials
- **Smart walls/white boards, virtual reality and holograms** to recreate/enhance human interactions
- **Bio-metrics** uses for security (access to buildings) & instant profile uploads



## FLEX-OFFICE 2.0

**Modular spaces & furniture** to accommodate the various ways people like to work :

- **Jigsaw/movable/customisable desks, seating and walls** for all uses (open space, collaborative, confidential)
- **Standing desks / treadmill desks & couch / slouching areas**

## SWEET OFFICE

Office spaces similar to **home/cafés** in terms of **design** and **well-being** :

- Incorporation of office **spaces for each use** : games, quiet, mediation, nap, digital detox, outside terraces/greenery/gardens
- **Adaptable features** : ergonomic seating, adjustable lighting, temperature, & music
- **Warm tones of décor** and walls that change their **view** and/or **scent**

## SERVICE OFFICE

- **Multiple on-site facilities** e.g. doctor / therapists, pharmacy, hair dressers, gym, bar, restaurant, child / pet care
- **Shower, bathroom** facilities, and large equipped **kitchens** to share meals

# APPENDIX



# Methodology

18 Focus groups across 6 countries for a total of over 140 people interviewed



## FOCUS GROUP

3 focus groups per country :

- With millennials
- With non-millennials
- With both millennials & non-millennials

## TOPICS

All focus groups covered both :

- Traditional offices<sup>1</sup>
- Flexible working spaces<sup>2</sup>

## PARTICIPANTS

### Roles

Business Analyst	IT Manager
Construction Administrator	Legal Consultant
Digital Support Coordinator	Sales Manager
Energy Administrator	Senior Community Manager
HR Analyst	Consultant

### Company size

Equal distribution of :

- Small (50-249)
- Medium (249-499)
- Large (500 +)

### Sectors

Banking	Healthcare
Broadcasting	Insurance
Communication	Law
Charity	Finance
Construction	Public Sector
Creative	Publishing
E-commerce	Recruitment
Education	Retail
Energy	Transport
Telco	Luxury
IT	Cosmetics

### Level of education

- Higher education (Master degree): 121
- Upper secondary education and post-secondary education: 20

### Age & Gender

Millennials			Non-millennials		
20-24	25-29	30-34	35-39	40-49	50-55
18	26	27	28	22	20
♂		♀	♂		♀
35		36	34		36

# Sociological drivers

## Projected society in 2030

### Companies

#### 1 SIZE

- Dominance of only 2 types of companies :  
**multi-nationals & start-ups**

#### 2 ORGANISATION

- Less hierarchy (manager = coach)
- Fewer employees (automation)
- Greater diversity

#### 3 VALUES

- Innovative and eco-responsible companies
- Focus on well-being

### Employees

#### OVERALL

- All employees on **flexible hours**
- More **distant relationships**, with **fewer in-person interactions** :
  - Online interviews
  - Virtual attendance to meetings
  - Bosses connected to their global teams via video-conferencing / VR

#### COUNTRY-SPECIFIC

- Empowered employees: independent, recognized, valued (FR, DE, SP)
- Most 'employees' as freelance/ independent entrepreneurs in project mode with multiple clients (NL, FR, IT)
- No more 'employment with 1 company' & continuous formation/frequent job changes (NL, FR)

### Selected quotes

*"I also believe that there will **hardly be any companies of a medium size**. There are either really big companies or very small companies." DE*

*"Good ideas will be rewarded . And **hierarchy will be more flat** in order to stimulate team work." IT*

*"I think companies are looking at that more and kind of thinking **more work / life balance, focusing on services**." SP*

*"You will have the **freedom to get involved with a project** if you feel you can contribute or if you want to learn something" FR*

*"People will **work with several companies simultaneously**. It will be the norm." NL*