



The Experts' Assessment Vol 2

Future working environments and support functions toward 2030

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Purpose

Survey 222 subject matter experts from around the world

Answer 31 questions concerning the future of the built environment

Identify facility managers' changing responsibilities

Uncover 15 key messages for the sector

Analyze the five cross-cutting themes shaping the future

Sharing experts' perspectives concerning these challenges

Real-time Delphi

About the methodology

Methodology helps deal with complexity

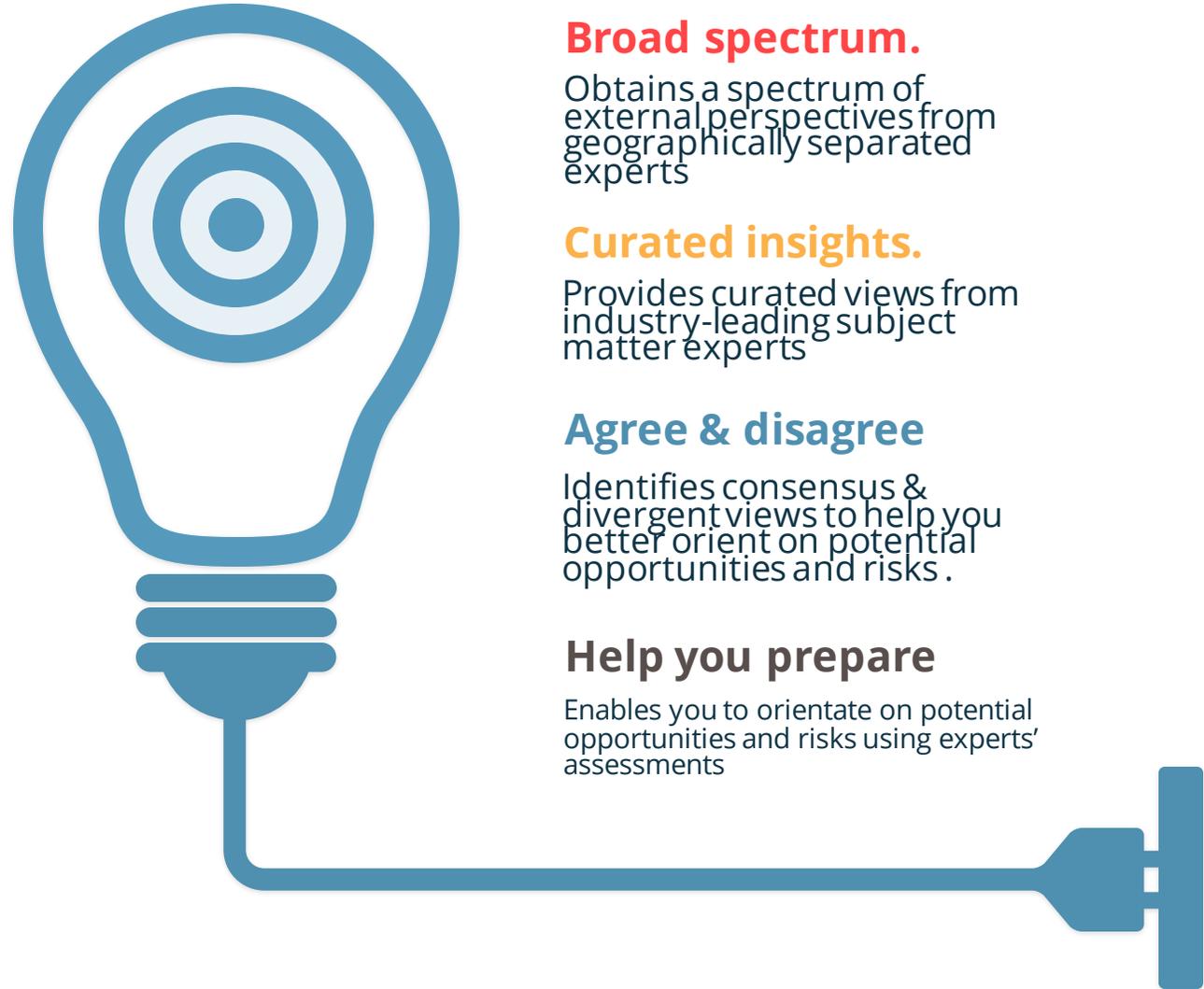
employs the real-time Delphi methodology, which is a method designed to help leaders and organizations deal with complex and uncertain topics.

Online digital platform

Using an online digital platform to facilitate an asynchronous debate among geographically and professionally diverse SMEs, decision-makers can explore experts

Online debate

The Delphi platform ran from 22 July 2022 – 5 September 2022



Broad spectrum.

Obtains a spectrum of external perspectives from geographically separated experts

Curated insights.

Provides curated views from industry-leading subject matter experts

Agree & disagree

Identifies consensus & divergent views to help you better orient on potential opportunities and risks.

Help you prepare

Enables you to orientate on potential opportunities and risks using experts' assessments

Participant activity

A vital element of the real-time Delphi is the makeup and the collaboration of the SME panel. SMEs were active on the platform (see table right).

1.906

Comments

Over 31 questions, averaging to **61** comments per question

1.687

Revisions

Over 30 questions, averaging **56** revisions per question

390

Visits

2 returns per SME



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CHAPTERS & TOPICS



Facilities in demand toward 2030

- Office density per employee
- Offices in demand
- Building classes in demand
- Real estate strategy
- Potential impacts of a recession



Technology, work & workforce development

- Digital Twins
- Virtual office environments
- Employee monitoring
- Challenges to address
- Technologies entering the workplace experience



Workplace management & strategy

- Office's purpose
- Business drivers
- Amenities and services
- Regulations
- Office's purpose 2030
- Motivation for coming to the office
- Distributed working



Environmental, Social & Corporate Governance

- Health & well-being
- Remote working & health & well-being
- Employment
- ESG-related investments
- ESG goal setting



Facility management in 2030

- FM & environmental sustainability
- FM business drivers
- FM responsibilities
- FM & "at-home work" environments



Facilities in demand towards 2030

Demand shifts towards flexibility and quality

*Working predominantly
from home reached nearly
half the workforce*

48%

*in cities like Washington, D.C.,
USA*

Nearly

25%

*of the workforce works
predominantly from home.*

“Responsibilities and support services will grow in FM, and hopefully, they will include work-at-home environments.”

Subject Matter Expert – “The Experts’ Assessment”

Key messages from **Experts' Assessment** study

Expect square meterage/footage decline

54%

Leverage more flexible spaces with short leases

59%

Reduce square meterage/footage

44%

Leverage more coworking spaces

Key messages from **Experts' Assessment** study

Recession likely to accelerate consolidation

RECESSION

69% expect recession will accelerate consolidation of footprints and cost reductions



Key messages from **Experts' Assessment** study

Greater flexibility and flight to quality

Definitions

Class A buildings

Most prestigious buildings competing for premier office users with rents above average for the area. Buildings have high quality standard finishes, state of the art systems, and exceptional accessibility.

Class B buildings

Buildings competing for a wide range of users with rents in the average range for the area. Building finishes are fair to good for the area. Building finishes are fair to good for the area and systems are adequate.

Class C buildings

Buildings competing for tenants requiring functional space at rents below the average for the area.

Coworking locations

Buildings where multiple tenants (such as entrepreneurs, start-ups, companies, or nonprofits) rent working space (such as desks or offices) and have the use of communal facilities

Overview of SME responses

Class A

61%

Higher or much higher

Class B

44%

Lower or much lower

Coworking locations

80%

Higher or much higher

Class C

61%

Lower or much lower

Key messages from **Experts' Assessment** study

Allocation of space and amenities to shift toward shared



Size of office to shrink



An increase in the square feet/meters per work point, while overall decrease in the number of dedicated workspaces

But...



Square feet/meter per employee on site to increase



Spaces devoted to communal areas and amenities would increase, shifting the ratios of private-to-public space to the public's favor



"For some (not all) industries, where employees are effective working mostly outside of an office, the very definition and use of an office will change."

Subject Matter Expert — "The Experts' Assessment"

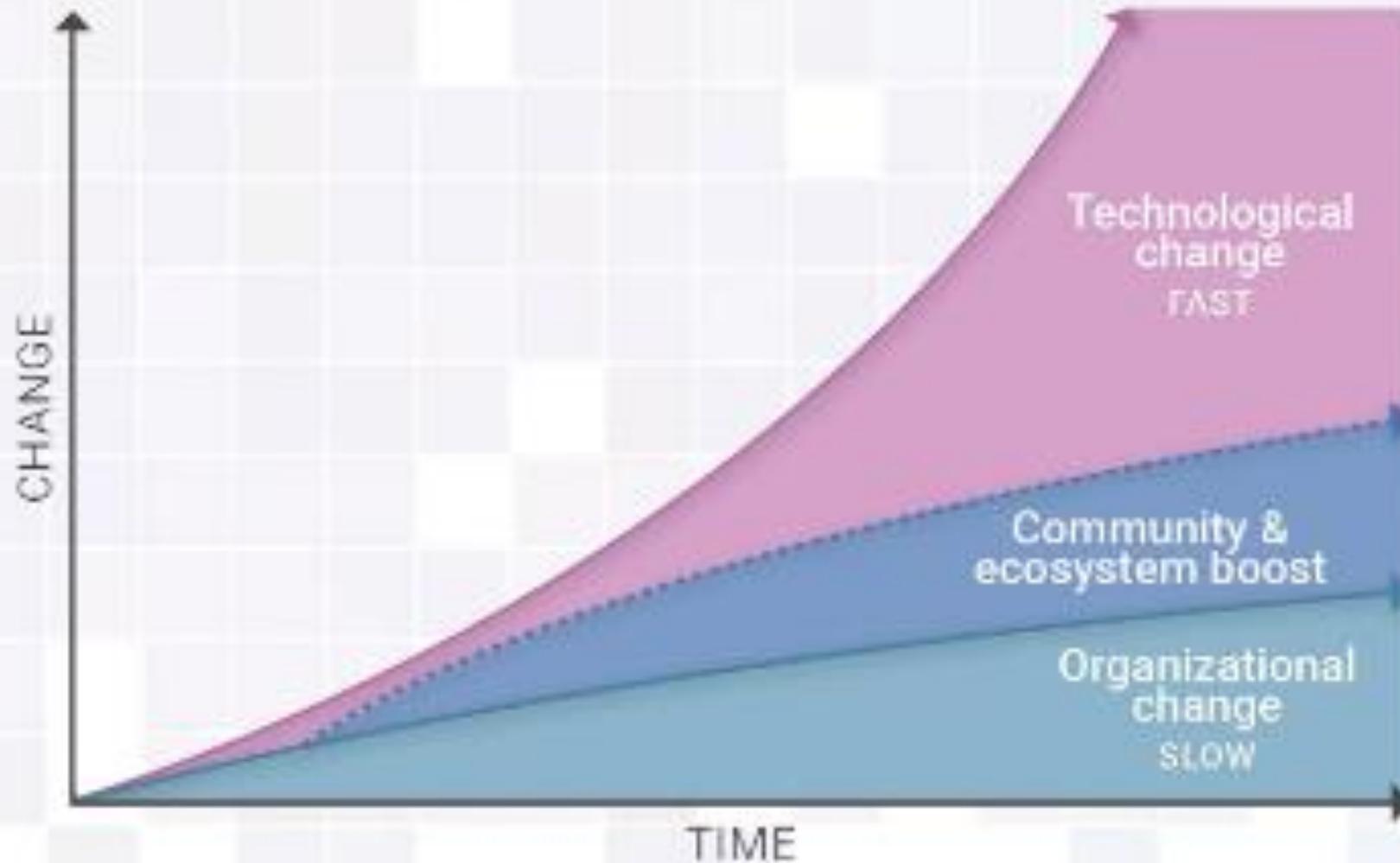


Technology development, work, & the workplace

Expect a tsunami of transformation



Digital transformation



(Source: Martec, Scott Brinker, VP Platform Ecosystems, HubSpot)

Digital transformation to solve FM challenges



Developing and servicing spaces that promote occupant health and well-being.



Reducing facilities' environmental footprints and impacts.



Providing operational telemetry, augmenting limited maintenance personnel, enabling facility managers to do more with less.



Narrowing and closing the flow of materials, energy and water in buildings and more.

Key messages from **Experts' Assessment** study

Digital tools and at-home work point setup and support key amenities toward 2030

83%

At-home work point
setup & support

92%

Digital tools

54%

Integrated
enterprise and
metaverse solutions

Key messages from **Experts' Assessment** study

How likely will the following technologies be supported in most Fortune 2000 companies' offices by 2030?

81%

expect mixed reality interfaces (including augmented and virtual reality) for employee training and onboarding in most Fortune 2000 companies

Key messages from **Experts' Assessment** study

How likely will the following technologies be supported in most Fortune 2000 companies' offices by 2030?

75%

multiexperience platforms that create consistent user experiences across web, mobile, wearable, conversational, and immersive touch points using touch, voice, and gesture to ensure.

Key messages from **Experts' Assessment** study

How likely will the following technologies be supported in most Fortune 2000 companies' offices by 2030?

75%

End-to-end AI-enabled integrated workplace/building management systems
IWMS/BMS that use pervasive data collection from devices and IoT to provide near-real-time actionable insights on occupant behavior and facility operations

Key messages from **Experts' Assessment** study

How likely will the following technologies be supported in most Fortune 2000 companies' offices by 2030?

59%

Frictionless offices where people and goods can navigate buildings to destinations without the assistance of a human staff member

Key messages from **Experts' Assessment** study

How likely will the following technologies be supported in most Fortune 2000 companies' offices by 2030?

52%

Digital humans in receptions, help desks, etc., can produce a whole range of human body language, interpret clients' input and provide answers they need

Key messages from **Experts' Assessment** study

Challenges to address when aligning digital & physical experiences:
Overcoming organizational barriers remain a key challenge

31%

Cybersecurity risks

33%

Organizational barriers
among functional areas
(e.g., HR, IT, and FM.)

28%

Differences in
expectations
between employee
and managers

24%

Lack of resources
available to support
both digital and
physical worlds

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hok
h+k

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JLL

The logo for savills features the word 'savills' in a lowercase, red, sans-serif font, positioned below a solid yellow square background.

savills

The logo for Planon features the word 'Planon' in a blue, sans-serif font, with the 'o' highlighted in green. Below it, the tagline 'Building Connections' is written in a smaller, blue, sans-serif font.

Planon
Building Connections

Download **the report**





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