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First European Focus Group survey on office end users: Moving towards a future for the modern office building combining sustainable, smart, flex, services and sweet

alstria, COIMA RES, Colonial, Gecina, Great Portland Estates plc and NSI in recent months have run a full Pan European Focus Group analysis to better understand the future of the modern office building from an end users' point of view.

Considering the ever-increasing importance of understanding how the needs of the users of office buildings are evolving, the six listed office companies decided in H2 2018 on an innovative approach, usually applied to the consumer goods industry. A number of focus groups, comprising selected office users, have been asked to share their vision of the future of the modern office building. This analysis is a first for the European office real estate industry.

The focus groups included 18 meetings and interviewed 140 end-users in the UK, France, Germany, The Netherlands, Spain and Italy on their vision of the future user experience, the evolution of the workplace, the evolution of organisational structures and more generally the role of tomorrow's office building in terms of use and service.

The end users who participated draw 3 principal drivers:

1. *Sociological*: the role of the company office will evolve to respond to workers' needs to have meetings, collaborate, socialize and feel fulfilled at work
2. *Environmental*: in the future, employees will be much more demanding and much more questioning in terms of what a potential employer will be doing to tackle climate change
3. *Technological*: AI, Big Data, robotics, hyper connectivity will affect the way people work and connect as well as the organization within the companies

They also described 5 archetypes for future offices:

1. *Sustainable office*:
 - more sustainable and natural building materials;
 - sensor-enabled workspaces for energy efficiency optimisation;
 - spaces that encourage a green conscience among employees
2. *Smart office*:
 - mobile office: uninterrupted access regardless of physical space (in/out of the office);
 - seamless network access enabled by WiFi-friendly, non-blocking materials;
 - remote technology aimed at recreating/enhancing human interactions;
 - Bio-metrics uses for security (access to buildings) & instant profile uploads.
3. *Flex-office 2.0*:
 - modular spaces: walls for all uses (open space, collaborative, confidential);
 - modular furniture to accommodate the various ways people like to work
4. *Serviced office*:
 - multiple on-site facilities to facilitate work life balance;
 - shower, bathroom facilities, and large equipped kitchens to share meals;

5. *Sweet office:*

- office spaces similar to home/cafés in terms of design and well-being;
- incorporation of office spaces for recreational use and relaxation;
- adaptable features: ergonomic seating, adjustable lighting, temperature, & music;
- warm tones of décor and walls that change their view and/or scent.

The focus groups were conducted among a population of both younger and more experienced professionals working in traditional offices or flexible working spaces throughout urban locations in Europe. Office end-users were recruited among the whole market and not among the 6 REIT's clients. Their opinions reflect their own views. An abstract of the focus groups results is attached.

Olivier Elamine (alstria), Manfredi Catella (COIMA RES), Pere Viñolas Serra (Colonial), Méka Brunel (Gecina), Toby Courtauld (Great Portland Estates plc) and Bernd Stahl (NSI) declare in a joint statement:

"The main outcome of the detailed information and data that has been gathered through the focus groups is that listed companies to a large extent are already designing and offering to the market the buildings of 2030. However, we need to maintain our innovation pace and continue to offer best in class products to our clients if we want to stay ahead of the game. Our end users have a very strong and clear view of their needs and what they expect their workspace to look like by 2030. By listening directly to them without intermediaries, we have gathered very strong insights about the likely evolution of our market. It is clear that offices are more than ever the preferred choice for our end-users. Despite the technology, the need to meet, to share and interact within a dedicated space, in the most central locations, is growing, but "co-working" is not the only emerging subject: there are other revolutions."

alstria, COIMA RES, Colonial, Gecina, Great Portland Estates and NSI created in December 2017 a think tank aiming to group together the sustainability and innovation best practices of the six European REITs and to selectively conduct joint research.

About Focus Groups:

A focus group is a small, but demographically diverse group of people and whose reactions are studied especially in market research or political analysis in guided or open discussions about a new product or something else to determine the reactions that can be expected from a larger population. It is a form of qualitative research consisting of interviews in which a group of people are asked about their perceptions, opinions, beliefs, and attitudes towards a product, service, concept, advertisement, idea, or packaging.