

The Future OF WORK & WORKPLACE

An Insight Report by Holtby Turner Executive Search



HoltbyTurner



Holtby Turner Would Like To Thank

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Workplace - Building Space For The Future

Change in the modern workplace is affecting all of us. With the prolific rise of coworking and collaboration tools, the need for traditional office environments to work effectively has forevermore changed. From space to how we now connect and communicate, and the different expectations of life and career progression younger generations are driving, workplace 3.0 is here. Some even think we've moved through 3.0 and are now in 4.0.

All I know is this: never before has workplace and the built environment felt so exciting and dynamic, so full of opportunity and promise.

At Holtby Turner Executive Search, as our business grew, we needed larger offices and a permanent London base. As we took on more staff, so we needed to adjust and accommodate different work-life requirements. As communications and technology developed, so contact with candidates and clients around the world got easier. We found ourselves able to work effectively in a more flexible way, with no need for a fixed 9 to 5, office bound set-up, five days a week.

Driven by both the growth in flexible working - and the non-traditional specialist expertise that goes into delivering

this - so the demand of senior interim roles arising within the built environment has skyrocketed. To handle the demand for talented individuals to fill them, I'm delighted to announce the launch of Holtby Turner Interim Leadership, headed by Kembi Coakelin.

In our fourth insight report, we've brought friends and colleagues across the built environment to share their expert opinions on the future of workplace. It's been a tremendous pleasure to collaborate and share opinions and ideas with so many others. Their forward-thinking perspectives have been fascinating to hear as the report has been researched. I do hope you'll enjoy reading it as much as we did producing it!

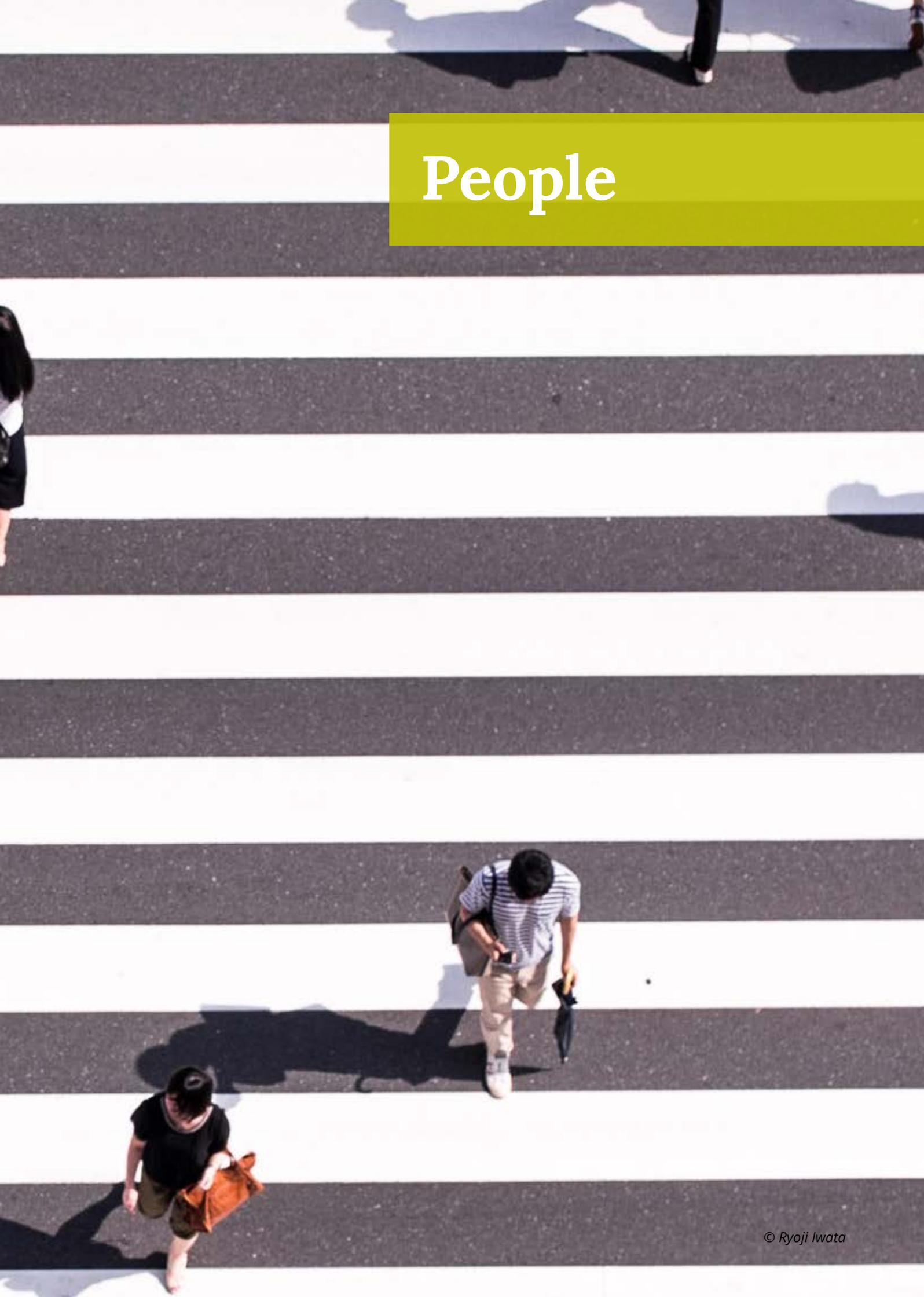
We hope it's an insightful read and raises some thought provoking questions!



Toby Turner
Founder & Managing Director
Holtby Turner



People







Learning At Work - An Evolution

Bill Gates reads a lot. Twice a year he spends seven days in his secluded cottage for what he calls a “Think Week.” This is a way to ponder the future of technology and new ideas for Microsoft and his foundation. Completely alone with his own thoughts and a pile of readings, Gates disconnects from the world. Some of Microsoft’s core innovations come out of these Think Weeks.

This is all well and good for Gates: as one of the world's richest people he can do as he pleases. For the rest of us in real estate, this may be trickier to pull off. Yet we too need to upgrade our learning. As our last insight report *A Very Modern Leader* pointed out, transformation demands leaders who promote learning environments. Strategy is key here, as the path to distributed learning is by connecting knowledge flows, often across multi-disciplinary facets in an organisation. But how can leaders encourage curiosity and a love of learning?

Learning To Find

To enhance curiosity, consider your inputs. An increasing trend for CEOs around the world is micro think-tanks, with both domain experts and end-users. These bring fresh thinking and expose blind spots, and highlight that which is valuable and relevant for the executive team and organisation. Regularly changing members is essential. For example, if your project directly targets zillennials, then where are the zillennials feeding through relevant insights to you and your board?

Learning To Process

Processing information through reflection and critical thinking gives our thoughts meaning, and is where we can begin to connect the dots and find opportunities. However, processing what we learn is maximised by sharing. Whether at learning lunches, a monthly all-hands meeting or a weekly blog-email, as CEO you are not just sharing the thinking behind your vision but actively sharing your growth, thus reinforcing that learning does not show lack of knowledge, but leadership.

A genuine love of learning can be felt by employees and has been shown to become contagious. Let's next look at how it can be seeded to grow, peer to peer.

Peer-To-Peer Learning

Many organisations in real estate and construction do not have formal structures in place for peer-to-peer learning, despite research showing that asking our colleagues for advice or feedback is the default action for the majority of us. So if formal training and experiential learning are common, why not formalise a peer-to-peer learning system?

The reasons are surprisingly complex, according to Kelly Palmer and David Blake in their book *The Expertise Economy*. Their research found that managers were apprehensive about establishing formal peer-to-peer learning because of the widely-held belief that external experts are better teachers than those inside the business. Additionally, because peer-to-peer programmes often had less time allocated to them, due to workload demands, group learning got spaced out, often over months – which was deemed less beneficial than intensive training with an external consultant.

Whilst logical and something we feel makes sense, this is wrong. As *The Expertise Economy* argues, "peer-to-peer learning taps into the expertise that already exists in your organization (sic). Think of all the smart people that you hire and surround yourself with every day, and how much could be gained if peers shared their expertise with each other to learn and build new skills". It mirrors the way in which we learn. The authors continue: "People gain new skills best in any situation that includes all four stages of what we call the 'Learning Loop'." In this loop learners gain knowledge; then apply that knowledge; get feedback on their learnings, and reflect on what has been learned.

Peer to peer learning is not just for creatives or the tech crowd, it's for any forward thinking organisation who wants to remain a market leader.

Peer-to-peer learning has no hierarchy or ranking system, and enables a space where staff are more likely to be honest about development needs. Off-site or online training often stifles openness, whereas peer-to-peer learning demands the giving and receiving of honest advice and constructive feedback. It also helps those involved to think carefully about their feedback, putting more time and energy into making it meaningful, relevant and constructive. As those involved are given the opportunity to work through conflicting viewpoints and belief systems, they also practise essential leadership skills by fostering empathy, reflection and creativity.



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Peer To Peer Learning In Practice

Structure. Depending on the size of your organisation, peer-to-peer learning programmes can be online or in person; with members paired up for one-on-one sessions; or in groups of 6 or less working together on real work problems, over a set period of time. Perhaps the most common are weekly sessions, followed by a company organised lunch, allowing time for questions and reflection.

Appoint a facilitator. Although peer-to-peer learning has no hierarchy, appointing a skilled facilitator helps organise sessions, keeps things on topic, and ensures the atmosphere

The driver of peer to peer learning must come from the top and the CEO. It emphasises that if you're not learning, you're not growing and if you're not growing, you're going backwards.

is friendly, relaxed enough for experimentation and where no question is ever deemed 'stupid'.

Focus on real-world situations. Sessions have the best outcomes when they focus on real problems members can get stuck into solving. Taking the theory out also makes it easier to remember what has been learnt.

Get social. Whether in person or online, regularly meeting to discuss ideas is the only way learning becomes a way of life. Larger companies such as LinkedIn, Zalando or Proctor & Gamble even run wide campaigns that get everyone involved.

A row of yellow and green hard hats hanging on a red metal rack at a construction site. The background is a blurred view of a building under construction with red structural elements.

Contracting Cultures & The Gig Economy

The world today lives in a gig economy. Originally coined to describe platform-based tech companies like Deliveroo and Uber, gigs and short-term contracts are increasingly prevalent in real estate, and this presents a challenge to our leaders.

As project work becomes more fragmented, how do you ensure a culture of joint responsibility when many employees see work as a string of gigs? How do you ensure a unified brand in a world defined by temporary contracts? This is something many of the CEOs we work with see as a major challenge.

In *Humans as a Service: The Promise and Perils of Work in the Gig Economy*, Jeremias Prassl outlines both the promise and perils of the gig economy. As work for many becomes more flexible, so cultures must follow suit. Experimenting with 'gig-time' employees runs the risk of creating cultural silos, so how can that be avoided?

Avoiding Silos

The first step is to be clear about which kinds of work are moved into the gig economy. A charter document regarding the process through which a job might be made either permanent or less can be of great help here. Another step will be making sure all employees are assessed in a transparent and fair manner. In construction, issues are already creeping in between workers contracted via online platforms run by algorithms and rating systems, with those hired and supervised by direct line managers.

EAAS – employees as a service – will only grow bigger. Leaders in the built environment wishing to be prepared must acknowledge and work for this future.

Above all else is the need to build and develop a resilient corporate culture. By making culture open and easy to adopt, gig workers feel welcome and part of a greater whole - do not underestimate the importance of meetings and parties in this! Ensure they do not feel excluded by having to endure the humiliation of asking for keys to the bathroom, for example. This kind of cultural silo will rapidly build resentment.

Equally important is ensuring that the outward-facing part of the company remains uniform. As more tasks are moved to temporary workers, there is a risk that clients experience an uneven service which damages a brand's image and core messages around customer experience. In *Harvard Business Review's 6 Ways to Build a Customer-Centric Culture*, brand leadership author Denise Lee Yohn shows how important it is to establish clear customer cultures, particularly in the light of such cases described above.

The culture must be tied to customer outcomes, regardless of what work contract the customer-facing person has. Similarly, compensation for all employees, from permanent staff to "giggers" should be tied to customer success factors. Every person working for the company should feel that the customer is their customer, and feel motivated to give their best.

In some organisations, this can well create friction. Often this can be due to a sense of entitlement among permanent employees. Leaders in the built environment need to combat this by making sure that everyone understands, and accepts, that customers come first, if that is indeed where you stand as an organisation. Leaders should also be careful not to alienate good gig workers, or see them as endlessly replaceable. On the contrary, establishing a good rapport with gig workers will be a high priority in the future workplace.

Flexible Outlooks, Flexible Working

All this is already a fact of life for many organisations delivering off-site services. In the future, the need for stability in the face of fragmenting work will only increase. As early as 2001, author Daniel H Pink spoke of a *Free Agent Nation*, an economy defined by flexible work. Today, we call it the gig economy. In the future, as platforms mature and technology develops, we might just call it "work". To prepare for the next step, what can real estate and construction leaders do?

One, start taking mixed-contract cultures seriously. Leaders will need to work hard to achieve cultural cohesion in the age of the gig economy. Respect and community-building activities will be key. Two, perceived fairness between different contracts and different contractors can make or break a culture. Transparency is critical here, as is the capacity to explain why such differences exist. Three, you need to think of and like the clients. Your organisation may be made up of varied employees and giggers, but the client should see a unified front. Invest in service training, it will pay back handsomely. Thankfully, with the right culture and the right mindset, this can be a win-win-win.

A win for companies, who gain unprecedented flexibility. A win for employees, who can find the mode of work that works for them. And a win for clients, who can get the best of all worlds – the stability of a corporation combined with the can-do attitude and flexibility of freelancers.



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Designing & Managing For Inclusivity



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Despite the almost universally accepted truth that in business, a company's people are its most important asset, the reality in many companies around the world is neither this simple nor that rosy. But why?

Leaders in people strategy well know that globalisation and an increasingly disparate workforce, make managing our most important asset increasingly complex. That's before we think about how to hire, develop and retain star talent, or ensure we're keeping younger workers happy and motivated. As I said, it is far from simple or rosy, and is a challenge for all leaders, far beyond the built environment.

What we see more and more in executive search briefs signals what we believe will be the new killer skillset for real estate leaders: establishing and managing an inclusive culture. Whilst it is not top of the agenda for all CEOs, it is for those leaders seeking to make tracks in what we see is the new world of work.

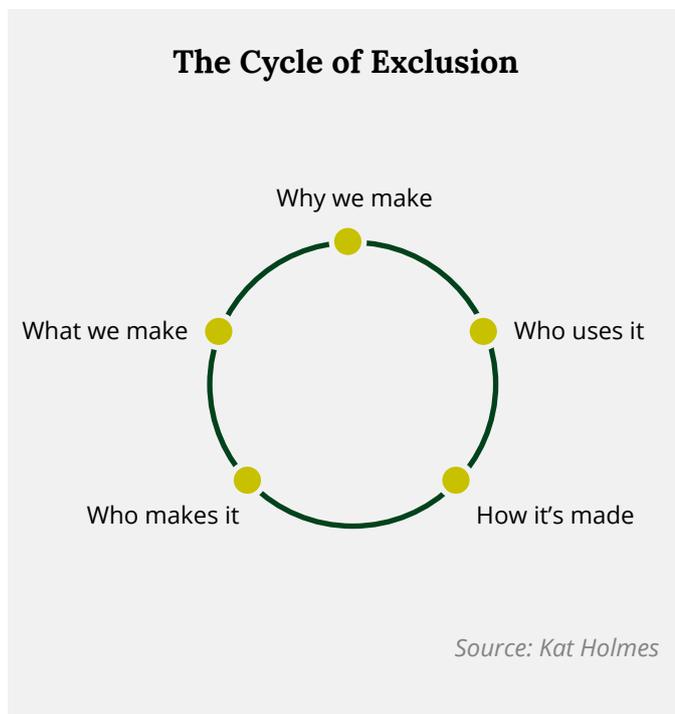
Let us be clear on what we mean by establishing and managing an inclusive culture. Inclusivity does not mean including everyone in all things. Nor does it mean that inclusivity should be the defining aspect of all contemporary management. Rather, it is a way of thinking about talent strategy and HR that recognises employees' inherent diversity and heterogeneity. Or put simply, one size certainly does not fit all when it comes to people management.

Designing Inclusivity

A new book on inclusivity caught our eye recently, called *Mismatch: How Inclusion Shapes Design*. Its author is Kat Holmes, Google's Director for UX Design, and a well-respected human-centric designer. Holmes asserts that inclusivity will not be inherent just because we like the sound of it but that we must deliberately design for inclusivity, and view it as less of a 'thing' and more of a process. When we design for inclusivity - be it a product, a service line or even a talent strategy - the breadth and depth of inclusive design is far reaching, as Holmes illustrates brilliantly in her sketch.

Understanding The Cycle Of Exclusion

Holmes's process is called 'The Cycle Of Exclusion'. By working around this cycle we are forced to ask simple yet important questions before creating or re-evaluating existing processes, such as: Why are we making this? Who uses it? How is it made? Who will make it? What is it we are making? With this perspective, whilst architects cannot accurately predict how residents from different backgrounds and with diverse abilities might use a building, they can work through the Cycle of Exclusion to highlight exclusionary design and environments that are not fully inclusive.



Adapting Inclusivity Design

In a similar manner, forward-thinking managers should be able to look at management practices and consider how these might be seen and met in a different manner, and by different employees. We have been talking for a long time about cross-cultural competencies in the built environment, yet the reality we see is that few managers are fully aware of this beyond their regional environment.

To heavyweights in the built environment, cross-cultural awareness and knowing how to apply it, is a billion-dollar differentiator. In China, knowing the cultural diversity between the Zhuang and Guangxi the people become a cultural imperative that not only impacts design, but can make or break a deal.

In their fascinating book *Gen Z Effect: The Six Forces Shaping the Future of Business*, Dan Keldsen and Tom Koulopoulos argue that inclusivity to Zillennials is something they expect and draw energy from (zillennials being the newly appointed term for Generation Z, inspired by millennials). Accustomed to a world in which cultures mix at the speed of the internet, and where new markets are only an Instagram-click away, they see inclusivity as the norm. Leading them thus requires a sensitivity to this, and a capacity to capitalise on unfamiliar trends and markets to win loyalty.

Into this context has stepped Black Females in Architecture (BFA), a new society co-founded by four young, brown women Selasi Setufe, Neba Sere, Alisha Fisher and Akua Danso. BFA has over 150 members who connect in person and via their WhatsApp group. Already with a commission in Bermondsey, "for those who care about diversity in architecture, the founding of BFA is the biggest leap forwards of 2018" wrote Architecture Foundation's Phineas Harper in his 2018 annual review for Dezeen magazine.

A Questioning Approach

What this means is that an increased focus on inclusivity can bring about several positives for companies. On the one hand, inclusive hiring and management practices enable a company to draw from a wider talent pool. On the other, the talents acquired in this manner can give key insights into the needs and behaviours of new customer groups.

As we move through today's uncertain times amid an ever-changing political backdrop, those of us in the built environment must be vigilant when it comes to high impact, global new trends upon which to capitalise. This is not limited to management. In practice, designing for inclusivity makes it easier for an organisation to be attuned and engaged in wider opportunities cross-sector. Observing, questioning and - more increasingly - using empathy to connect the dots, is open to all in modern, multicultural organisations. So which skills will this require in the future?

Louise Karunwi from the Chartered Institute of Personnel and Development offers some helpful starting points. As Kat Holmes pointed out, in addition to seeing inclusivity as an ongoing process rather than a target to be reached, we must become accustomed to the state of imperfection that is implicit to this way of working - for an organisation can never be 'fully inclusive'. Thus, leaders seeking to deepen



No matter how we get there, the trends are clear. Tomorrow’s world - and tomorrow’s competition - requires leaders in real estate and construction to celebrate inclusivity and re-imagine their management practices.

their cultural inclusivity or enter a new market should seek to establish reflective practices which highlight what may or may not turn out to be exclusionary, as the simplest step forward in modernising their businesses.

In writing about the slow process of inclusivity in modern organisations, Karunwi emphasises the need to balance thinking with an immediate proactivity as part of a long-term agenda. The built environment needs a more diverse workforce, but this cannot be achieved by force. Instead, leaders need to look through their entire HR process - from hiring through talent development to succession planning - to ensure that inclusivity isn't just a buzzword, but something living and breathing in the organisation. As Liz Peace continually reminds us through Real Estate Balance, diversity is not a nice-to-have, it directly impacts your bottom line, growing revenue, resilience and a competitive edge.



Digital Nomads

Today, the reality of ‘going to work’ has shifted dramatically. Deloitte’s Millennial Survey of 2016 reported that no less than seventy-five percent of millennials expect to be able to “work from home or other locations where they feel more productive”.

The percentage is likely to be higher among zillennials. As today's younger generation has a self-confessed obsession with what is known as 'productivity hacking', so they challenge notions of working in spaces that are not optimised for productive work. So what does this mean: is the future of work going to be defined by digital nomads?

Perhaps it will, yes. Take the open plan office; once heralded as the ultimate way to increase teamwork and communication in an office, it rapidly grew in popularity when designing and organising workspaces. These days, however, open plan offices are being panned. As a recent study from Harvard University shows, open plan lowers face-to-face interactions and spikes time emailing. Millennials took note and cafes got their vote.

Who Are Digital Nomads?

Digital nomads try to move away from workspaces that aren't as productive as promised, and instead search for alternatives. Look for instance at the massive increase in co-working spaces. These serve as intelligent hubs for digital nomads, who often pick spaces not just for their amenities but also for their ambiance and adaptability. Now, as companies look for the best person for the job - which does not mean the best person within the UK - procuring experts from a globalised talent pool makes the future of workspace look very different from the office blocks we're used to.

The Impact On The Built Environment

What this means for those of us working in the built environment is that we need to start asking new kinds of questions about workspaces. We need to realise that the office needs to become more than an office. In rethinking the office as a value-adding hub in the new world of work, there are questions we need to ask.

What do our workspaces offer?

Historically, workspaces offered things that most people couldn't find elsewhere. This included things we today barely even think about; things like stationery, a calm place to work, a desk. Today, when access to ink and paper is universal, and with the possibility to work almost anywhere, the value of office staples has decreased radically. In order to be meaningful in the new world of work, offices need

to up their offerings: this is why we see co-working spaces offering yoga classes, business mentoring lunches and a studio for recording podcasts or vlogs.

Offices for the new world of work need to become far better at offering ways for teams to work efficiently together, for distributed teams to stay in touch, and for high talents to have access to cutting-edge technology. If staff feel more productive elsewhere, this should be a wake-up call to upgrade the office.

Are our offices built for work-life balance?

As metropolises like London grow, issues such as living costs and traffic can become make-or-break for the new digital nomads. Spending an hour or two in traffic increases no-one's productivity, and the costs associated with living in city centres can limit a company's capacity to attract younger top talent. So why not rethink work and the office to reflect this? By allowing more remote work we can improve the family life of employees, ensuring greater (not lesser) productivity. In the future, workplaces may well become something to visit once or twice a week, and with amenities to further enhance work-life balance - such as in-house wellness services and the like.

Are we designing space for the mixed work-life?

Remote work is not an either/or. The new digital nomads are happy to come into the office, when it makes sense. In the future of work, we will probably stop obsessing over working in an office versus working remotely. Instead, most if not all employees will do both, choosing their mix according to what makes them most productive. New technologies will make this ever easier, and smart companies will already start investing in ways to support this. Virtual reality conferencing will in all likelihood become the new normal, and AI-aided team management tools will make control less of an issue.

Some of the leading technology startups have already started making this new world of digital nomads a reality. It is only a matter of time before pioneering companies in the built environment take the leap. Offices won't disappear, but they will need to change to keep up with the future. As new technologies make this easier, so fresh new talent will demand it.

Workplace: The Next Frontier



*Chris Hood
Advanced Workplace Associates*

Since the beginning of the twentieth century we have been able to see how the pace of adoption of new things has accelerated. The telephone took 70 years to reach 80% adoption, the mobile phone 15 years and the latest iPhone, mere days. Such is the focus on short-term business outcomes, that there is a lot less focus on the reinvention that this high-change environment demands. Deliverables resulting from business strategy development need to reach deeper and more decisively across the whole organisation.

At any point in the life of an adoption curve, there are leaders and laggards, and it is dangerous to average the results. There will be true pioneers who are reinventing our world, whilst others follow, riding on the coattails of invention without understanding it. There is danger that these apparent adopters are popularising and distorting great ideas, which devalues the work of the true innovators. To illustrate: organisations are designing great looking workplaces, which tick the boxes, but are misaligned with strategic business challenges. Indeed here, we see the organisations themselves are not thinking about the future, but are focused on short-term financials.

What I see time and time again are: solutions that are out of date well before the lease expires; worse, organisations moving into new environments, but continuing to work in out of date ways, and at worst, organisations that expire in the face of disruptive competition.

There is no doubt that a genuine attempt is being made by organisations around the world to move from office as 'warehouses for the people' and to see them as spaces where productivity, community and creativity come together. Improving health and well-being has supposedly relegated cost saving well down the list. While remote working enables much needed flexibility, it may have taken a toll on company culture. Building a collaborative and creative workforce needs face-to-face time. Teams have always needed this to build trust and share knowledge. Today, however, we are seeing this togetherness in smaller, higher-energy, activity-based environments. This creates conflict and friction when the high-energy collaborative environments fail to deliver the peace and tranquility for individuals to "do their work", as it's seen.

As broad organisational roll-outs occur, sooner or later the effort to implement becomes seen as cost rather than value. Instructions emerge to optimise the resources required across construction, and technology platforms. Management and resources needed are compromised,



© Ludovic Fremondriere

change management programmes are shelved, and there is less employee engagement in soliciting input and buy-in. The outcome are solutions that are more corporate, less local and rarely any good. So how do we face the future?

Preparing for the future

The workforce itself is shifting before our very eyes. Every industry, every discipline, every educator ought to be thinking about what this means. Inspiring leadership can right many if not most of the wrongs we see in the workplace. I advocate for a new leadership role to be created which concerns itself with how we work, covering everything from business process and strategy, to technology, space, and human capital and beyond. This role would integrate and aggregate a group of stove-pipe functions into a set of common measures of success, like the conductor of an orchestra, as it were.

Increasingly, we are recognising that embracing a broader array of disciplines, sciences and skills in our workplace solutions requires a tapestry of potential contributors. The types of new and creative measures that will underpin the future of workplace success involves the up-skilling of leaders who are otherwise intellectually capable of understanding the great opportunity at hand. Professionals from service design and future thinking,

along with innovation ideation and organisation design should be permanent residents in every large forward-thinking organisation - and those are just the essentials.

Many talented individuals shy away from careers within work and workplace, possibly due to a preconception that they are technical disciplines. This saddens and concerns me because the future of the workplace demands a wide set of inputs with both fresh and expert perspectives. Mathematicians, environmental psychologists and anthropologists bring equal but differentiated value to those of an architect, engineer, HR director or a technologist.

Paving the way for workplace 2.0 and the world of work in 2030 is a fertile ground for great thinkers and great doers - and we need many more of them. The built environment needs a siren call to unleash the possibilities of what working with us can offer. As pessimists crawl into their shell and deny the reality of our shifting world, so opportunity and excitement awaits the optimists who see this ever changing world and bring their vision to it. Here today, gone tomorrow has never felt as apt as the future of work and the workplace move ever closer. It has never been so inspiring a space to be.



New Forms Of Leadership Cultures

© Jimmy Chan

The old leadership paradigm was rather simple. Some led, others followed. You knew who the leader was, sometimes by the size of their office. Employees tended to be followers by default. The hierarchies were clear, and visible.

As work and workplaces change, so must leadership. We can already see how work is changing, becoming more open and collaborative. This affects leadership in a fundamental way; for the future of work will mean a paradigm shift for leaders as well.

However, this structure is already starting to come apart, AND being replaced by forms of leadership more suitable for the future of work.

We've already seen the first step of this. Leaders can no longer depend on command and control structures. As General Stanley McChrystal shows in his excellent book *Team of Teams: New Rules of Engagement for a Complex World*, even the military today needs to shift towards self-managing teams as the core unit. Today, leaders increasingly need to focus on enabling such teams. Instead of micro-managing, they need to empower and get out of the way.

Thousands of years of top-down management - yes thousands - is a legacy that will take some time to shift. What we are seeing today are just the first steps of a completely new form of leadership culture, propelled by transformation and fresh talent entering the workforce.

So what is ahead for leadership? In *Leading Agile Transformation: The New Capabilities Leaders Need To Build 21st Century Organizations*, McKinsey notes that businesses and their people should stop assuming the leader is always right and embrace creativity as a behaviour and curiosity as a culture. We need to have less emphasis on authority and more on building partnerships. We need to abandon a mindset of scarcity and control, and instead focus on creating abundant value. All in all, leaders need to be less focused on being leaders, and more focused on nurturing leadership in the whole organisation.

We all know that self-leadership precedes the leadership of others. If you cannot lead yourself, what right do you have to lead anyone else? In the future, however, leaders must extend beyond just leading themselves and actively teach others that same self-leadership. Without this, it is impossible to build an organisation of self-managing teams, or to move it towards a mindset of collaboration and abundance.

Teaching self-leadership doesn't come naturally to all leaders - some feel it lessens their control and thus their power, whilst others think that since they had to learn it on their own, others should too.

As the world becomes increasingly complex, something we all see quite clearly in the built environment, so leadership itself becomes a more complex construct. In the next twenty years the main task of the leader might not even be to lead, but to work towards making everyone a leader. The title of technology entrepreneur Fredrik Arnander's book captures this well. In *We Are All Leaders: Leadership is Not a Position, It's a Mindset*, he asserts that mindsets can be taught. Creating a culture in which a leadership mindset can be adopted by all is for some organisations the only way they will survive the next ten years.

At Holtby Turner Executive Search this is the most important facet of today's

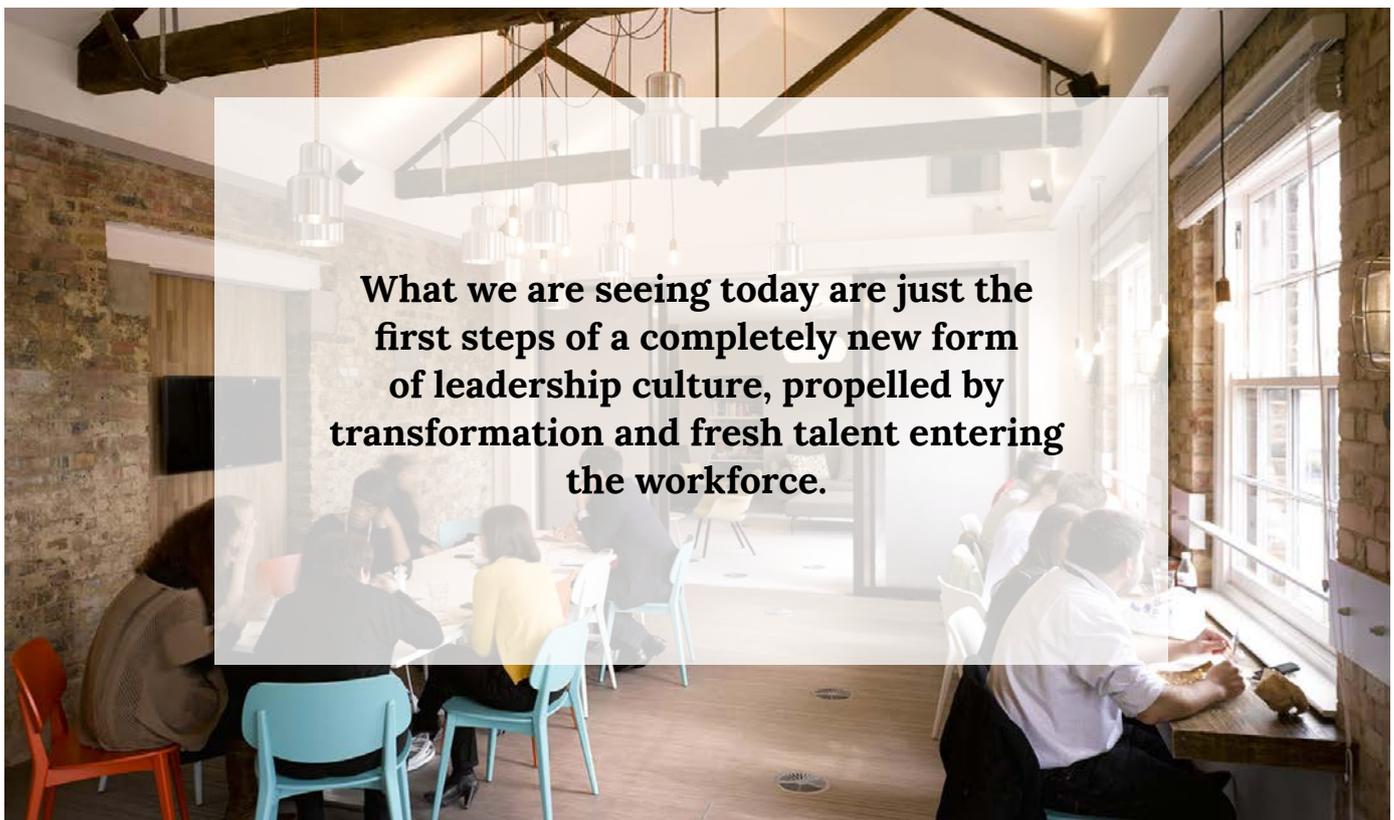
All in all, leaders need to be less focused on being leaders, and more focused on nurturing leadership in the whole organisation.

leadership cultures. They have to be inclusive, and to put learning first. They are about the many, not the few. As this report argues elsewhere, we can already see that these themes form critical components of the future of work. Leaders need to position themselves as custodians and stewards of this shift.

What the world of real estate and construction will need therefore, are

leaders who can be mentors. Leaders who are comfortable with delegating power and authority. Leaders who ask questions rather than insist they have all the answers. Leaders who see that their role is to create a culture defined by empowered individuals and teams. We already have organisations that have taken great steps in this direction (see, for instance, Sue Greenland's piece on leadership development at LandSec in our last report here).

Yet for the work this will require, there is so much to be won. We believe that developing leadership mindsets across the built environment is our surest way to ensure success. The industry has come far with the 'Good To Great' management principles. But the next twenty years demand a new set of principles built around self-leading collaborators. Only as we move from management to collaboration, will we enable an agile and thoroughly modern future for the built environment.



What we are seeing today are just the first steps of a completely new form of leadership culture, propelled by transformation and fresh talent entering the workforce.

Giving Zillennials What They Want. Incentivising The Generation Of The Future.

The arguments regarding motivation and incentives are as broad as they are deep, and have long been sacrosanct and rarely challenged. However, as new generations enter into the workplace and older ones look to leave it, new thinking is emerging.

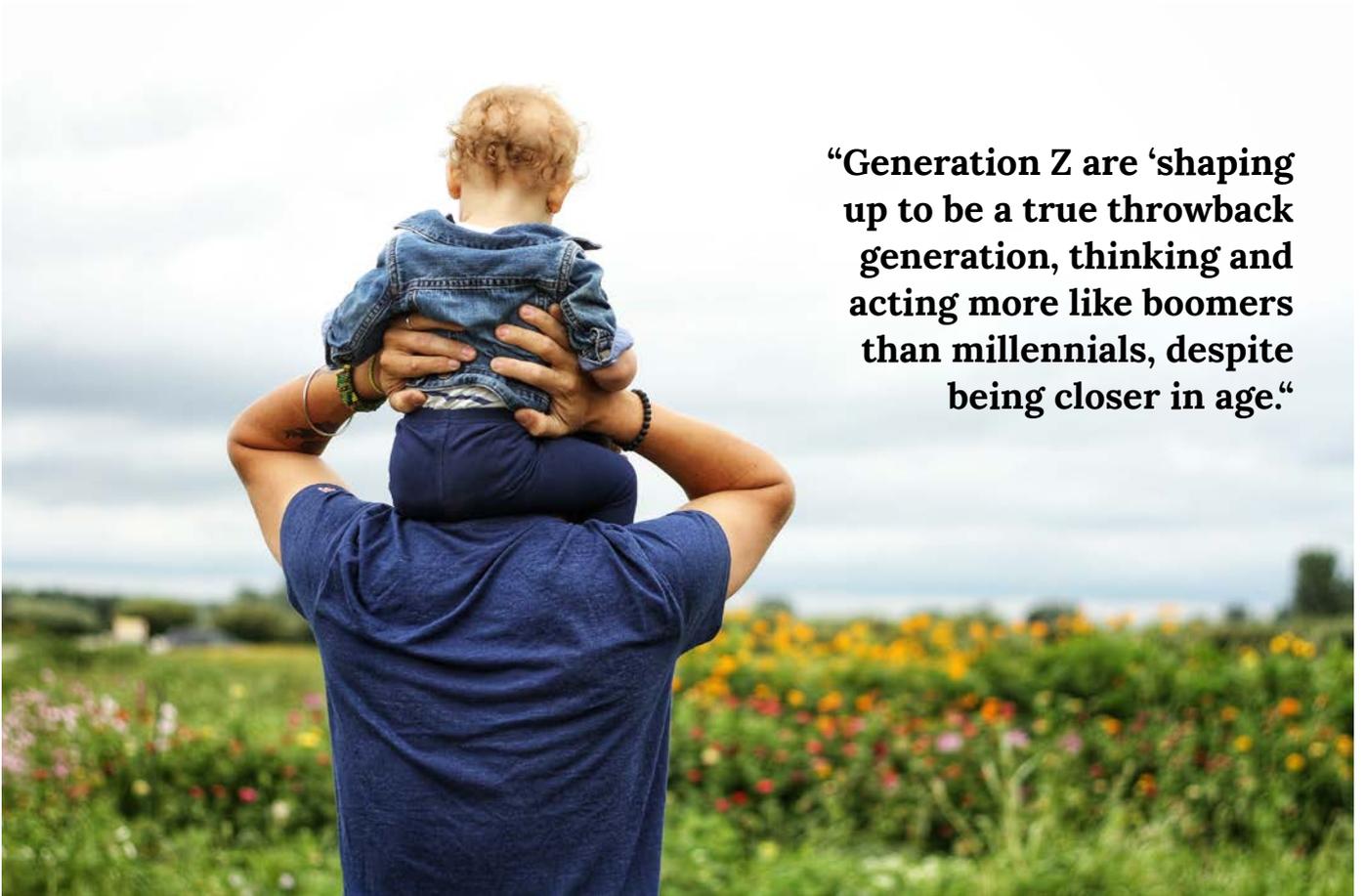
When it comes to millennials (those born between 1980 and 1994) and zillennials (those born between 1995 and 2015), we must be careful not to bracket them into the same space. There exist persistent myths that both groups are less interested in monetary compensation and more interested in other forms of incentives. Yet this is only partly true, and remains wholly dependent on the economic demographic of the individual.

Zillennials Are Not An Extension Of Millennials

Expert on this topic is The Center for Generational Kinetics. In their research study on Generation Z in the USA entitled State of Gen Z 2017, they detail how this new generation thinks about money, savings, debt, spending, and retirement. What appears to be true for Generation Z around the world is that they are 'shaping up to be a true throwback generation - which thinks and acts more like boomers than millennials, despite being closer in age to them than boomers.

How so? The State of Gen Z 2017 points out that zillennials are 'already working, saving money, and determined not to





“Generation Z are ‘shaping up to be a true throwback generation, thinking and acting more like boomers than millennials, despite being closer in age.’”

© Maria Lindsey

end up like Millennials. 77% of millennials currently earn their own spending money through freelance work, a part time job, or earned allowance’, it revealed. This contrasts with what the American Psychological Association thought back in 2009 showing that millennials are very money-focused, with a “63% increase in the number of young people who rated money as ‘extremely important’”. Only 16% of baby boomers agreed, versus 26% of zillennials.

So, what does this mean to the future of work, in real estate and construction and further afield? As the zillennials are poised to become a defining generation in the workplace, how are they motivated in the workplaces, and in which ways will our incentive programmes need to adapt?

What organisations in real estate must do - along with all other industries - is focus on their branding as an employer. Zillennials may not be working en masse in 2019, but they are paying attention now. “Before Gen Z enters the workforce in mass, employers need to define and communicate who they are, their purpose and what makes them unique” especially across social media channels, noted Monster in 2016.

Zillennials show a greater propensity to move jobs if their workplace and career development expectations are not met, thus thinking beyond just the salary. In fact, in a study by Monster, the number one thing that zillennials mention as central to making them stay long term with an employer was “an empowering work culture”, mentioned by 29% of respondents.

In other words, for attracting and keeping zillennials, money alone isn’t enough. Employers wanting to recruit the very best of these talents for the future need to think beyond the pay cheque. There are three issues here that warrant special attention: Wellness, flexibility, and family.

Wellness. Flexibility. Family.

With regard to the first, it is important to note how big a role fitness and wellness play in the lives and values of both zillennials and millennials. A Yahoo Health Study from 2015 highlighted that wellness is the second-strongest value these generations hold, and that a staggering 90% of millennials think staying healthy will help them succeed. To attract this group, companies need to consider how



© mentatdgt

What organisations in real estate must do - along with all other industries - is focus on their branding as an employer. Zillennials may not be working en masse in 2019, but they are paying attention now.

wellness can be incorporated into incentive regimes. Examples might be free exercise classes or gym passes, time out to exercise during the workday, or wellness rooms to practise mindfulness and yoga in the workplace. Consider what this means to the design and development of contemporary offices, and how work health initiatives can be deployed as employment perks.

Whilst zillennials might value money highly, they also value flexibility. In a meta-analysis carried out by the online newspaper Quartz, zillennials are shown to value career advancement, but not necessarily of the classical type. They value empowering work cultures and work-life balance, and also value experiences more highly than consuming material goods. Forward-looking companies wanting to

attract the best and the brightest may thus need to plan their incentives to live up to this – the chance to take time off for new experiences and the possibility to test out new kinds of roles will clearly figure among expected incentive structures of the future.

Finally, it is clear that the possibility to have and spend time with a family is rated very highly indeed by the new generations. Millennials value family over even wellness, and work-life balance rates incredibly highly for zillennials as well. As the latter ages and starts having children, the trends clearly show that this will be a very central concern for them. Companies will thus need to create incentive structures that mirror this, with family-friendly policies going from a nice-to-have to a must-have. Parental leave and support when it comes to child care are both valued very highly, as is the possibility for remote work and flexible working hours.

All in all, money still matters and will continue to do so. Still, as we look into the demographic shift that is already occurring with the zillennials, other aspects will become increasingly important for attracting high potentials and top performers alike.



Pondering The Future Of Workplace



Despina Katsikakis
Head of Occupier Business Performance
Cushman & Wakefield

No-one can have missed just how much technologies have changed over the last decade, but what people still underestimate is just how much our behaviours have as well. I often use my granddaughter as an example of this. She is three years old, and she will just bounce into the kitchen, say “Alexa, Moana” and start dancing along to the Disney tune. I look at her do that, and I think about what her expectations will be in 20 years, when now at three her instinct is to use her voice to access just about anything – any experience that she’s looking for. This is why I always return to the issue of technology, because I think that technology inadvertently rewires our expectations. This, in turn, has a massive impact on how landlords and asset managers need to change their mindsets.

Today we have situations, such as in a plane, where there's not even cell phone coverage, yet with WiFi we can still do a Facetime call, or a virtual collaborative session. I was on a video call recently complete with virtual whiteboards and people from across Europe, the US, and Asia. We were looking at materials and collaborating live in a manner we simply couldn't have done five years ago as this level of technology didn't exist. In five years' time from now, we will be able to both do far more, as well as feel and sense as if we are all in the same room. However, whilst technology will continue to be the central driver of change, the speed of change will make it hard to predict exactly how.

The evolution of virtual reality and immersive collaboration tools will transform the way we work and I think we often underestimate the way that consumer technology is changing our expectations. Gaming provides a particularly interesting generational example. Gamers feel very comfortable being part of a virtual community. As the gamer generations grow up virtual immersive collaboration tools will be available at most workplaces which will change their perceived need to go to certain places to work, as well as the specification expectation of office buildings.

The implications for the built environment, will be to consider the workplace as a variety of different kinds of flexible and on-demand places to support our convenience and functional requirements. This changes our thinking about the office from "the office as a building, a single place, to go to work", to 'the office' as a network of physical and virtual, flexibly accessed and optimized places that support us to do our best work, connect with others effectively, support our sense of community, lifestyle and wellbeing.

A further physical impact as the office becomes a network of on-demand places, will be a high degree of customisation. Like a stage-set, it will be reconfigured to respond to our individual functional and wellbeing demands. Already today, cell phones have the capability to tell us the quality of air and light in the spaces we occupy and give us the option to either adjust that through the building sensors that exist in the system, or choose not to be there.

As sensor technology becomes the norm across fit-outs of offices, we will be able to leverage predictive analytics and real-time data to drive both productivity

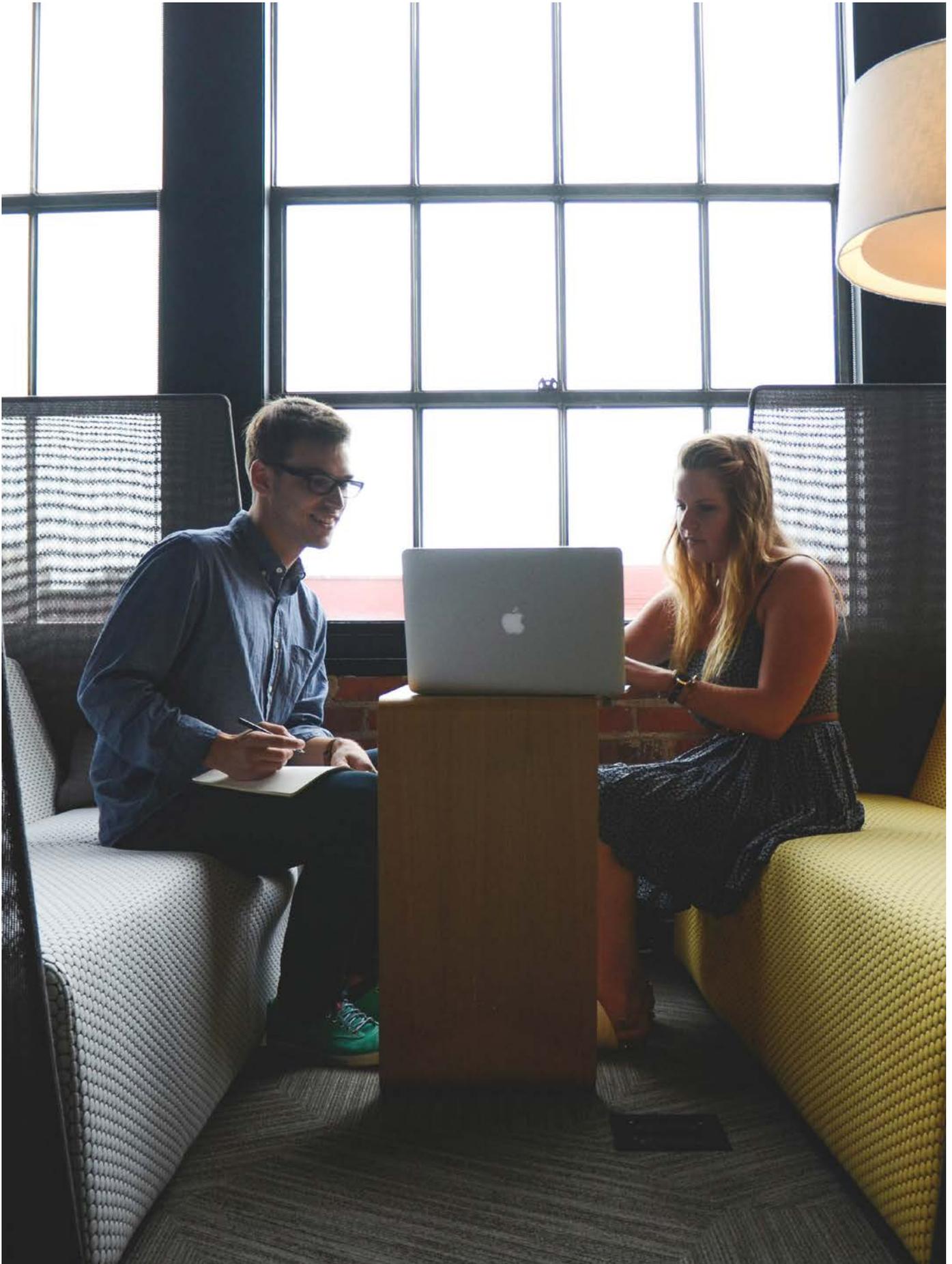
and efficiency. For the individual, the space will know who 'I am' what temperature 'I like' to suit my optimum productivity. The data will also tell the facilities manager and the landlord whether the space is being utilized in the most efficient way. For example, if a meeting room that is planned for eight people is typically only being used by 2-3 people, as IOT applications and analytics become real-time dynamic space management tools, landlords will have the data and be able to reconfigure the environment to make the most use of space as well as provide the most productive environments to support people to do their best work.

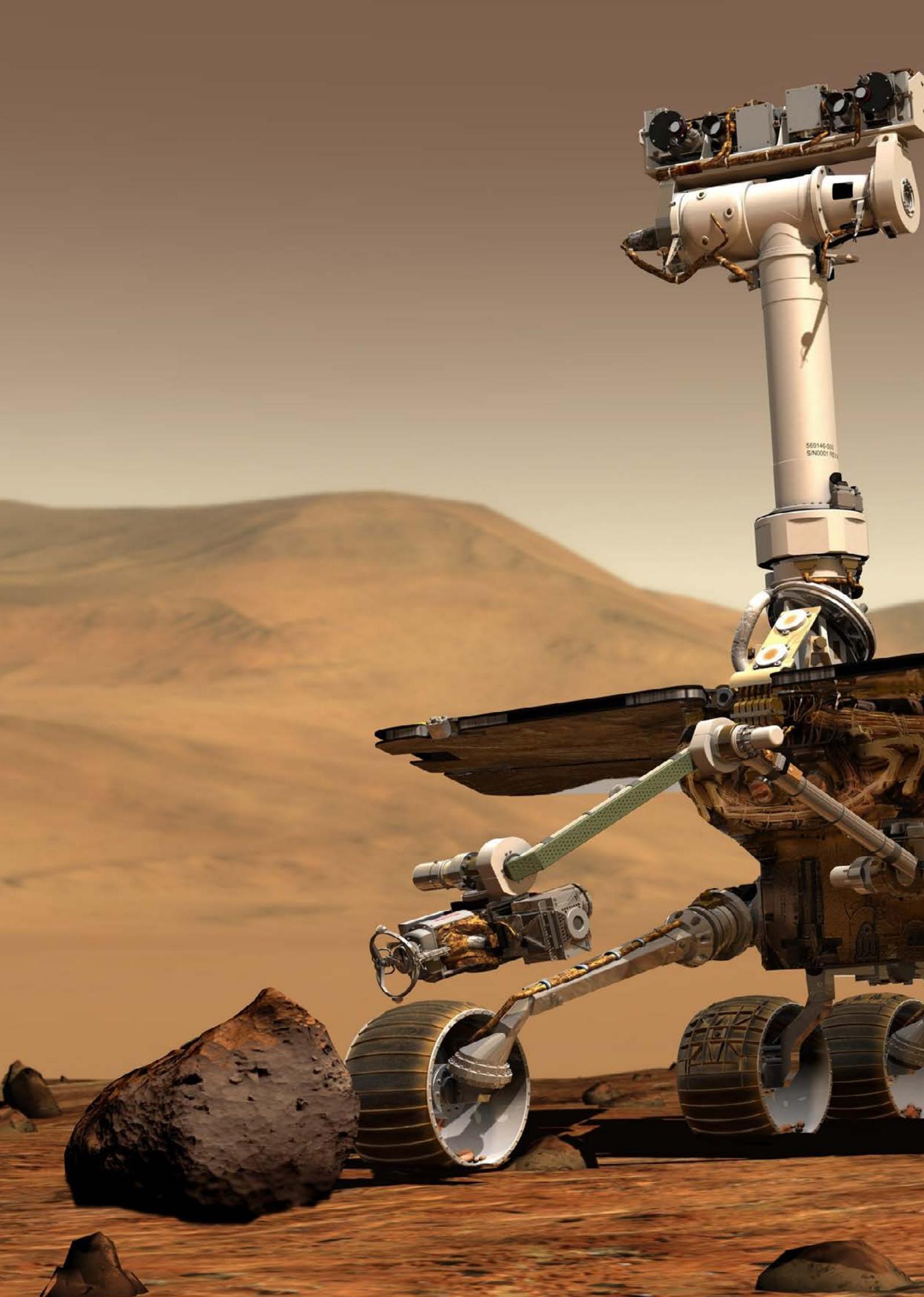
Making data relevant to occupiers' business is really important, so landlords need to provide a plug-and-play open framework and think about technology as another utility. Landlords will also be required to provide the data and technology interface to answer more complex questions, as occupiers want to understand how their space supports business performance.

Another aspect that is really important to recognise, is that office design is always reflecting the culture of an organisation and actively impacts and informs the culture and drives behaviour. Putting in gaming rooms in an organisation that does not need ad hoc collaboration and does not have a culture of embedded play will be completely counterproductive. It is essential to start with the end in mind, to determine the business outcomes and clearly understand what the desired behaviours are in order to design the appropriate environment and policies to engender the desired behaviours and outcomes.

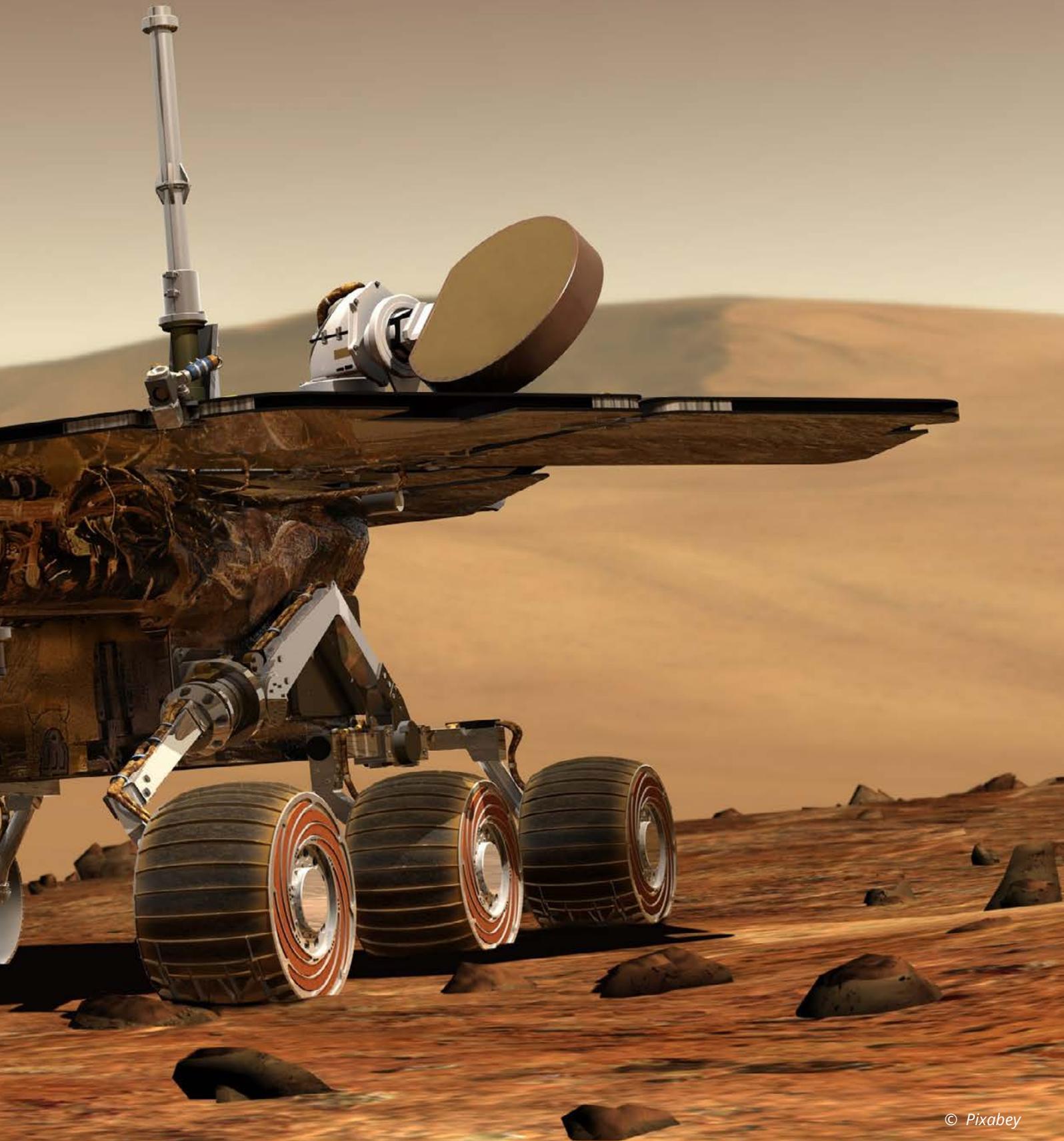
The role of the workplace to reflect 'brand and values' is becoming a critical issue particularly as organisations today all compete for the same type of talent, in a market place of limited resources. The organisations that succeed recognise that their employees are their customers, and approach their office space by focusing on people first and creating a much more immersive experience not too dissimilar from retail environments.

With this new focus on people, everyone in real estate today is really in 'hospitality'. This means that there needs to be a critical shift of mindset away from the hard, fixed specifications of delivering a building to delivering responsive, meaningful and inspiring experiences and services to people.





Tools



Will Automation Be Automatic In Real Estate?

According to McKinsey Global Institute's report published in May 2018, *Skill Shift: Automation And The Future Of The Workforce*, demand for technical skills such as advanced IT and programming is predicted to more than double by 2030.

Mass changes in industrial skillsets are part of history. Adaptation is part of survival, after all. Yet with the growth of artificial intelligence technologies, basic cognitive skills are simply not enough to survive the challenges that the workplace of the future will face.

As artificial intelligence appears set to reshape business and our very societies, there is both excitement and concern in the industry. Time and time again in times gone by recently, we have seen big-scale, big-data projects fall short of expectations when delivered. Disappointment in big data's over-hyped transformative insights seemed to cast a shadow over the powers of data and analytics until now, where machine learning seems to be the vital connector.

The artificial intelligence we see applied today - for the most part - has grown from algorithmic patterning developed in the fifties. These days we have vastly

superior computing that can process huge sets of data, but that doesn't make artificial intelligence 'intelligent' in any way close to the way we are, as humans.

"Technology is the easy part. The hard part is figuring out the social and institutional structures around the technology." John Seely Brown, Silicon Valley Guru and former Head of PARC.

Professor of Computer Science at Northwestern University, Krist Hammond defines artificial intelligence as 'any program which does something that we would normally think of as intelligent in humans'. How the program does it is not the issue, just that it is able to do it at all. What Professor Hammond suggests is distinguishing between artificial intelligence for automation, and artificial intelligence for human augmentation - or in other words, making humans smarter and faster.

As Don Norman, the originator of user-centric design recently said, artificial intelligence needs to "accept human behaviour the way it is, not the way we would wish it to be." He continues to point out that technology can inadvertently result in artificial stupidity if poorly designed, implemented, or adapted to a human context. In the light of this thinking, McKinsey recently reported with some

“Technology is the easy part. The hard part is figuring out the social and institutional structures around the technology.”

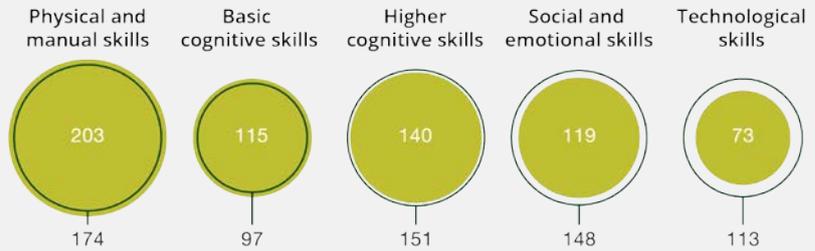
John Seely Brown, Silicon Valley Guru and former Head of PARC



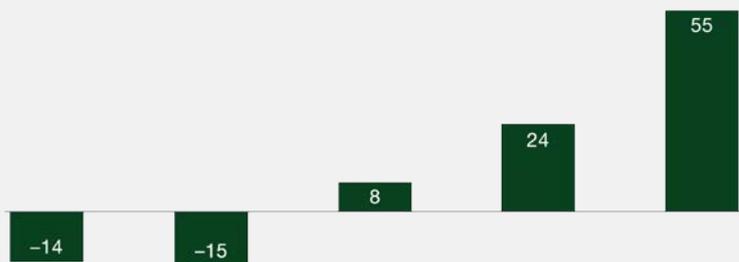
Automation and artificial intelligence will accelerate the shift in skills that the workforce need

Total hours worked in Europe and United States, 2016 vs 2030 estimate, billion

● 2016
○ 2030



Change in hours spent by 2030, %



Source: McKinsey Global Institute Workforce Skill Model; McKinsey Global Institute analysis

urgency the need to put in place large-scale re-training initiatives for workers now, if they are thought to be most affected by automation (see chart).

Context, Country By Country

Whilst we do not disagree with McKinsey's extensive research findings, understanding context is of prime importance in the conversation about the skills of our future workforce. Seeing beyond hyped headlines about robots stealing jobs requires business leaders to understand how automation will be introduced and developed within their country's individual industrial make-up.

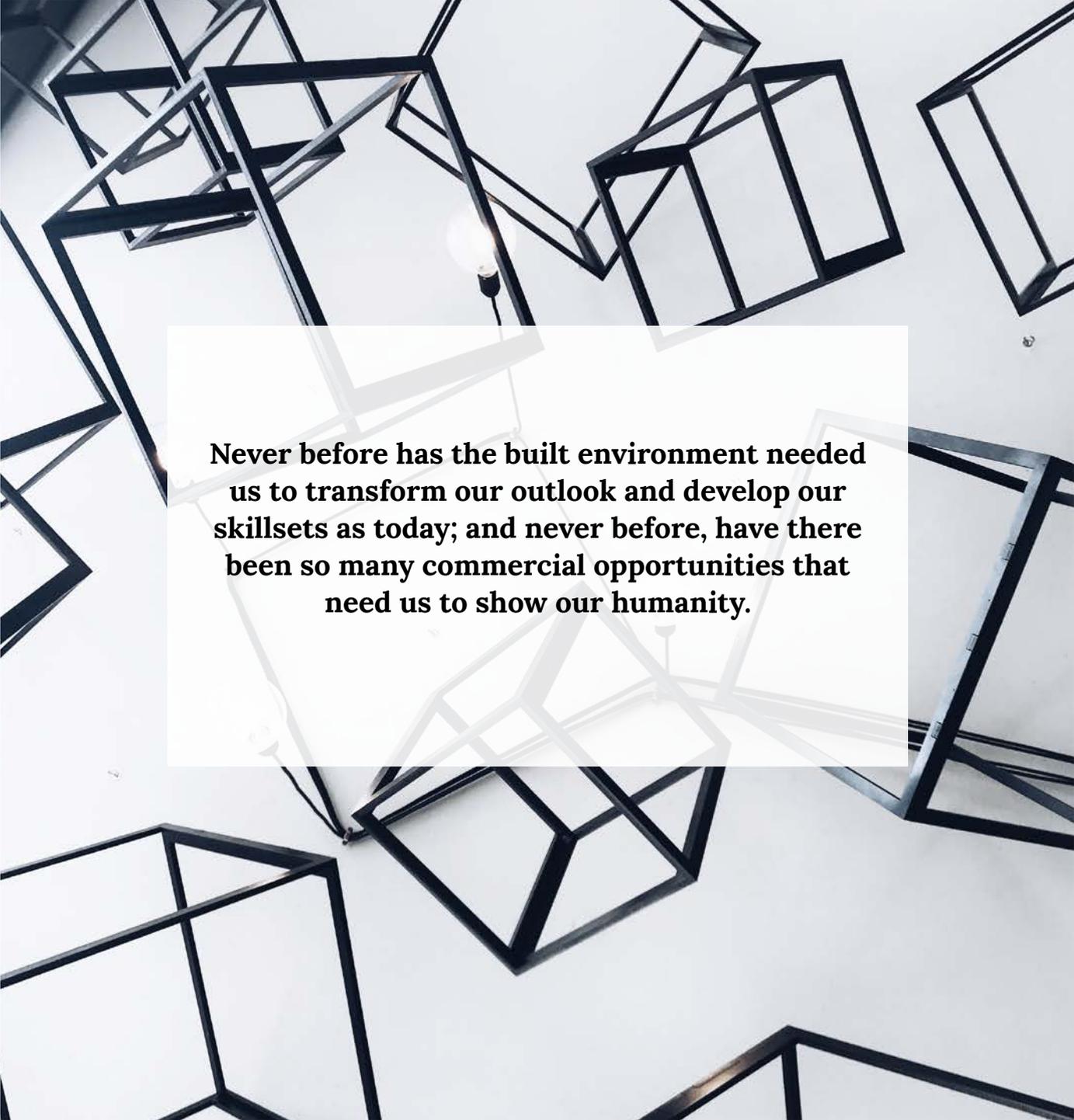
For example, the demand for cognitive skills, such as those found in administration, management and manual labour, are predicted to remain the largest skill category for countries where extraction industries are high in production labour. For example, McKinsey's research indicates that Great Britain's need for social and emotional skills will overtake those of manual labour - Germany, on the other hand, will require higher cognitive skills in the next ten to fifteen years. Such differences in industry and economy mean each country's predicted automation

capacity hangs on the speed and enthusiasm with which AI technologies are adopted; first by sector, and then by organisation. We would argue first and foremost, that such shifts are more dependent on present day European political environs, than technological advancements alone.

The Next Ten Years

What we think we will see in the next ten to fifteen years in real estate is human judgment deepening and becoming less biased, thanks to algorithms and machine learning. Most of us in real estate still use manual, or at best semi-automated processes in finance, property management, and portfolio management. Spreadsheets abound collating and analysing data for property valuations, cost analysis, lease management and forecasting. Vast swathes of time are spent reading, manipulating and extracting key data which is not only open to error and security breaches, but so dull!

Viewing humans and 'robots' as complementing each other, rather than competing with other, is the more astute view. In corporate real estate, for example, the area where we can see robotics and cognitive



Never before has the built environment needed us to transform our outlook and develop our skillsets as today; and never before, have there been so many commercial opportunities that need us to show our humanity.

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automation helping professionals is in analysing data with more speed and accuracy. We see it streamlining the management of lease recording, as well as compliance and risk monitoring. As productivity increases, so costs decrease; automation and machine learning technologies are generally more cost effective to implement than the historic practice of offshoring.

However, perhaps most importantly, is the satisfaction that more creative and human-centric work can bring

us. Technologies that relieve our staff of repetitive and mundane work, mean that time can be spent doing meaningful work, like evaluating business models or developing new service lines. Never before has the built environment needed us to transform our outlook and develop our skillsets as today; and never before, have there been so many commercial opportunities that need us to show our humanity.

Smart Buildings Won't Bite



*By Hannah Coleman
Head of Property & Workplace
Source8, Mitie Group*

According to recent studies, we generate 2.5 quintillion bytes of data daily – that's 2,500,000,000,000,000,000 bytes per day. It is estimated that over 90% of data ever created has been generated in the last 2 years, and the pace of growth shows no signs of abating.

Technology has transformed every aspect of our lives, from how we communicate, travel, work, exercise and shop, through to how we treat illness. With the Internet of Things, we now connect even the most ordinary of daily objects – you can buy smart flipflops for that summer break!

With the proliferation of technology across every aspect of our personal lives, why is it then that smart buildings prove so controversial? To understand this, I believe we need to look back to the very first implementation of technology as a workforce management tool.

In the 1800s, timeclocks were implemented as a method to ensure that wages were paid based on input. For the first time, employers were able to accurately identify and compensate employees for their time. However, for the employee timeclocks became just another way for employers to instill discipline.

Over time manual timeclocks evolved into computerised timeclocks, making the processing of input-based wages yet more efficient and further reducing inaccuracies – such as one employee stamping another's timecard. The introduction of computerised timeclocks kick-started the trend towards 'real time' monitoring of workplaces. However, with these systems working off employee numbers rather than names, they served to further dehumanise the workplace.

In recent years, innovations in workplace technology have sought to move away from monitoring as a method of measuring employee efficiency, to focus primarily on fostering employee productivity and well-being. Productivity growth has stagnated in recent years – falling from an average 2.3% annual increase before the financial crisis to just 0.4% between 2008 and 2018. Employer focus on well-being further recognises the challenge to business productivity represented by mental health, with 1 in 4 Britons experiencing mental health issues at some point in their lives.

Even with this change of focus, barriers to acceptance remain. There needs to be a seismic cultural change to move the mindset from a historical use of technology in the workplace to make people work harder, to helping people understand that technology can be used to help make buildings work for their benefit. New

offices can now be equipped with upwards of 30,000 sensors allowing for personalisation of working conditions (light, heat); intelligent building management (air quality, energy); smart connectivity (location and wayfinding); and systems monitoring (critical asset fault detection and diagnosis).

At Mitie, we are working with more and more clients who want to take advantage of technology and move to a 'Connected Workspace'. They are at the forefront of this innovation and understand that creating exceptional environments can boost the productivity of their buildings and ultimately the wellbeing of their people.

Analogue Learning From A Digital Building

Mitie recently moved into the iconic Shard building in London. As part of the design of this smart office, we created an experimental work environment, the 'Living Lab', with the express purpose of measuring the impact of biophilic design on worker wellness and productivity. Using Internet of Things (IoT) sensors to capture real-time environmental data on temperature, light levels, CO2 levels and total Volatile Organic Compound (VOC) levels allowed us to understand the actual indoor environment and the extent to which this impacted occupants' wellbeing and productivity.

Using measures focused on emotional and psychological aspects of wellbeing, gains can be

linked to data from IoT sensors. In a joint study with UCL, we were able to demonstrate a 60% increase in perceived productivity in the biophilic spaces. Furthermore, study participants felt 36% less worried, tense, anxious and nervous and 38% more calm, relaxed, laid-back and at ease.

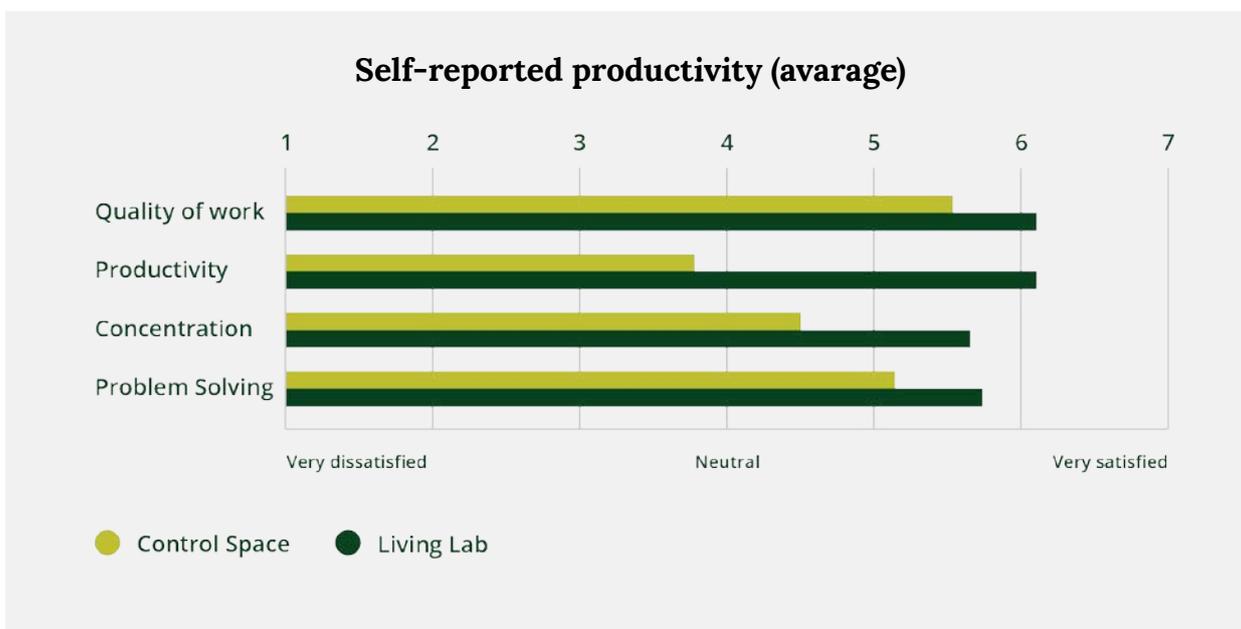
These significant productivity and wellbeing gains can be linked to relatively small changes to the physical environment. Comparing IoT data across the control space and the 'Living Lab', the 'Living Lab' was maintained within defined comfort policy ranges for temperature, CO2 (ppm) and luminance levels (lux) for a greater proportion of the study period:

- Temperature +31bps*
- CO2 +17bps*
- Lux +12bps**

**Percentage of time within defined comfort policy ranges*
***Reduction in time spent with excess levels*

The study clearly evidences the direct link between biophilic workplaces maintained within comfort policies and the perceived improvement of employee productivity, mental wellbeing and satisfaction. In a world where productivity is king, it also indicates the potential for increasing bottom-line return on investment from improving the working environment.

With smart buildings clearly offering potential to better our working lives, perhaps smart buildings aren't quite so scary after all.





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Alternative Realities & The Future Of Work

PwC's Global Construction 2030 report forecasts that the volume of construction output will grow by 85% to just over £11 trillion worldwide by 2030 (\$15.5 trillion USD). But how will it increase so dramatically amid an economic churning that seems to be signalling a downturn?

Well, unsurprisingly, technology seems to be where everyone's putting their faith - for the faster homes can be built, bought and sold, the more money everyone makes. Investment in startups is on the rise across the industry: CBRE has its PropTech Challenge, MetaProp has most of real estate's heavyweights behind real estate tech startups by bankrolling their new \$40 million VC fund. Whilst investments are on the rise, and diversifying, there remains a large portion of interest in virtual and augmented realities. No surprise, as research by Global Market Insights,

Inc predicts the market size of augmented reality solutions will exceed \$50 billion by 2024, despite 2019's gloomy predicted outlook by the tech press.

Alternative Realities - A Quick Guide

VR and AR I assume we all now know about, but XR perhaps less so - it's eXtended Reality. In with XR is MR, or Mixed Reality; when both VR and AR are used together.

Nowadays it's not too far-fetched to imagine that alternative realities really will change our world. However, before we take a magic leap too far, here are the basics behind them.

VR, or virtual reality, is the oldest of these concepts. It refers to ways in which we can use technology to create more-or-less real-looking places to explore and engage with. The key characteristic of this is that it attempts to be an immersive experience, divorced from the real world.

In comparison, AR or augmented reality, removes a lot of the problems with representing an entire virtual world. Instead, it keeps the user in the real world, generally with your smartphone or special glasses. Such overlays can provide simple information (e.g. “this corridor is 18.7 metres long”) or complex (such as a inserting moving human-sized characters into a room to show what it would look like full).

XR stands for eXtended Reality and is the umbrella term for all the technologies for representing and re-representing reality. It encompasses AR and VR, but also considers technologies where different versions of the same might be mixed and matched.

Most of us in real estate are familiar with Matterport’s end-to-end 3D immersive media platform, Microsoft’s HoloLens and Vuzix, the VR headset makers. In the built environment more broadly, specialists in safety Safety Compass are well respected, as is the French firm, GA Smart Buildings, and UpSkill’s Augmented Reality Platform offers so much to industrial workforces. But where do reality-based technologies fit into the future of workplace?

Talent Management, Training & Development

AR makes learning fun and engaging. If death by Powerpoint could be avoided with AR integration - and help employees perform at their best - then this is a win-win all round. For on-site training, or controlled testing, by ensuring we can test new methods or build prototypes without too many unnecessary risks, AR and VR have almost endless applications. For example, test-driving a new construction method before attempting to implement it in the real world.

Similarly, in today’s service-led economy, more and more companies are creating products that can be rather tricky to explain, and therefore quite hard to sell. Not everything sells itself, and AR could help solve this by doing demos in a way that people can understand in the real world; a more engaging explainer video, if you like.

Extending VR to video conferencing is less Star Trek than it might at first seem. Bringing together globally dispersed teams in meetings would be huge for culture building, relationship growth and a deeper level of understanding between international offices. With Google’s new Pixel Buds mixed into such a meeting, you can even translate on the fly (not too unlike the Babel fish in The Hitchhiker’s Guide to the Galaxy). Simple attempts at cross-cultural bonding, in reality, make a huge difference.

Yes, we are some way from the hyped science fiction-like futures that transformative technologies promise; if an environment can be imagined with alternative realities, it will eventually appear.

As an executive search firm, acquiring talent is one of the finest ways we think VR and AR could help the workplace. Think of the time saved on scheduling interviews, monitoring assessments and letting others review a candidate’s skillsets. Using VR in a hands-on way to check out a new workspace gives candidates an immersive experience which helps them to make an informed decision. Additionally, it would be a bonus for on-boarding, on both the candidate and employer side.

Imagining The Workplace Of 2025

The smart money in real estate sees AR as the bigger game-changer. Modern work life is dependent on data, and this is unlikely to change in the future. But data can be cumbersome and boring to access. Just think of all those hours spent poring over Excel sheets... AR offers vast improvements to this. Combined with AI and voice-activated assistants, you might be able to take the latest sales report, point your phone towards it, ask your phone to bring up the data you need, and see it appear as a pop-up out of the report. Point your phone to last month’s report, and the earlier figure pops up. Anything to brighten Excel is surely worth a try.

Same goes for PowerPoint! Whilst sitting in on a meeting, you might bring up your phone to the PowerPoint presentation being shown, and be able to flip through the key points in an instant. New meeting attendee turned up unannounced? Building on FaceID, why couldn’t a quick glance on your phone reveal their name (Mark), company size (86 people), and core business service? By overlaying key information from the real world, AR can make data quickly available, more relevant, and easier to process.

Over time, we are likely to see that AR and VR become embedded in other technologies. Yes, we are some way from the hyped science fiction-like futures that transformative technologies promise; if an environment can be imagined with alternative realities, it will eventually appear.



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Human Performance In The Workplace



*By Ken van Someren
Human Performance Consultant
KvS Performance Ltd*

Today's workplace is more than just a place to work. As well as attracting talent, engaging and inspiring the workforce, propagating organisational culture, the workplace must empower employees to perform at their very best. Human performance in the workplace is determined by organisational culture, environment and people bringing their best selves to work.

Taking a corollary from elite sport, the quest for the sub-2 hour marathon is widely regarded as the ultimate test of human performance and is fiercely contested by athletes and sports apparel companies alike. In elite sport, performance is objectively measured and clearly defined models explain what constitutes performance – for marathon running this includes human physiology, nutrition, psychology, biomechanics and aerodynamics. In contrast, we've only just started the race to understand human performance in the workplace.

Recent innovation in workplace design and PropTech have started to disrupt the sector, yet the workplace wellness industry often struggles to demonstrate a measurable impact on employee performance. Inevitably, the value and return on investment of workplace wellness is under scrutiny.

Brain Power

For the burgeoning knowledge-based sectors, productivity is a particularly nebulous metric. Performance in these sectors is driven by 'brain power'. With advances in neuroscience and technology, we can now very accurately measure cognitive function and dimensions of brain function that matter most in the workplace. Cognitive abilities such as focus, distractibility, problem-solving and agility are critical to effective communication and high-quality decision-making. With mobile technology, these can be measured to develop accurate models of performance in the workplace.

Novel approaches have shown the direct link between workplace design and brain power. Workspace temperature, noise and acoustics, air quality and lighting are all known to impact on cognitive function. To leverage these insights, it's imperative that real estate, IFM and HR teams take an integrated approach to workplace design and management.

Happiness, Health & Wellbeing

Happy employees are healthier, more engaged, creative and productive. While happiness is a fuzzy concept to many, there's very compelling evidence from business leaders to doctors revealing how happiness underpins productivity and success at work. Back in elite sport, not only do happy athletes perform better, they experience lower rates of illness and injury.

A solid foundation of personal wellbeing is key to workplace performance. Sickness absenteeism costs

the U.K. economy £17 billion a year, with chronic back pain and mental stress as the leading causes. However this doesn't include the significant cost of reduced performance at work. Recent surveys show 50% of employees believe that pain impairs their performance at work. Now, with the capability to evaluate cognitive function, we can directly measure this impact and cost.

Many workplaces promote or require employees to sit for extended periods. The adage 'prolonged sitting is the new smoking' may seem overdramatic, but the evidence is clear – extended periods of prolonged sitting is an independent risk factor for obesity, type II diabetes, cancer and premature death. More immediately, physical inactivity reduces mood, energy and cognitive function. So with sedentary workplaces killing people, let alone productivity, workplace design must recognise current expert recommendations and facilitate more frequent physical activity throughout the working day.

Peak Performance

For too long, 'performance' in the workplace has had connotations only of annual appraisals, performance ratings and bonuses. Unfortunately, rarely has it been interpreted as what's required to deliver results. High performing athletes and teams focus on preparation and processes to enable outcomes and results, adopting mantras of 'fail to prepare, prepare to fail' and 'control the controllables'. Understanding what it takes to win and living high performance behaviours is what differentiates the high performers.

We need a gear shift in the emphasis of workplace wellness programmes from sickness to performance. Tackling sickness and absenteeism is only the tip of the iceberg and fails to engage the majority of employees, who are healthy but can achieve so much more. Workplace design can provide an engaging and stimulating experience that enhances employee mood, as well as creating optimal environmental conditions to enable peak cognitive performance.

By integrating workplace design with employee performance initiatives, companies can enhance the brain power and performance of its human capital, in turn delivering a very real return on investment.

kvsperformance.co.uk

Smart Worker. Smarter Workplace.



*By James Pellatt
Director of Workplace & Innovation
Great Portland Estates*





For centuries people have been able to change and adapt their work according to their own motivations; the smart worker is therefore nothing new. The smart worker has been able to learn, adapt and respond to their environment, applying their skills to grow and develop. In the current climate, more choice is available to the smart worker than ever before, the cost of starting an enterprise is lower than ever, unemployment remains low and the changing world of work provides even greater opportunity.

By contrast, the smart workplace is only in its infancy and a significant opportunity exists to create the smarter workplace of tomorrow.

In a world where technology is blurring the lines between home and the office, Londoners are expecting more from their places of work. Creating space for London to thrive is becoming increasingly complex and as our occupiers' needs are changing, so our products are adapting. At Great Portland Estates we have been spending considerable time researching and thinking ahead to challenge and anticipate the products and services that our occupiers will need into the next decade and beyond. By placing the end user at the core we are creating spaces where people want to spend time and which deliver the smart worker space that offers control over their individual environment; a choice of where they work within a supported yet relaxed environment; a building that promotes sustainability and providing access to superior levels of service and amenity.

Early next year we will see the completion of the Hickman, a new development in Whitechapel, set to be our smartest building to date. Sensors in the workplace that connect to a bespoke app will provide constant (anonymous) feedback as to how many people are there, as well as the building's temperature, light levels, air quality and noise pollution. This use of smart technology helps us to work with occupiers to adapt and flex the building around their evolving business needs.

Most offices work at a constant set of criteria; the Hickman will be able to learn and adapt according to use. This lets us optimise the conditions for occupation, reduce energy costs and carbon emissions and thus make the workplace more sustainable. Combining these features with a fresh contemporary design, a choice of flexible work settings the smart worker finally gets the smarter workplace they deserve.



Rethinking Meetings

Articles on the future of work routinely predict the death of one or more aspects of office life. As early as 1975, BusinessWeek predicted the paperless office, and almost 50 years later, paper shows no sign of disappearing from the average office.

Just like email and messaging apps like Slack were supposed to save us from meeting overload, we have four in our calendar this afternoon. It is a universal truth that meetings are seen as one of the greatest banes of the modern working life. In the US alone, it is estimated that there are between 36 and 56 million meetings a day. Research reported by Australian software giant Atlassian states that employees attend 62 meetings a month on average, and report that 50% of these represent time wasted.

That is over 30 hours a month wasted in unproductive meetings! Despite data on meetings being rightfully challenged on accuracy, clearly the numbers as ballparks alone spell out massive potential improvement in productivity and efficiency. But how can we rethink and improve meetings in the future?

Australian software giant Atlassian states that employees attend 62 meetings a month on average, and report that 50% of these represent time wasted.

Mad Meeting Mondays, Anyone?

One step, suggested by a number of leading companies, is simply to eliminate all meetings on certain days. The company behind the popular productivity app Asana are pretty strict with meetings, unsurprisingly, and have a policy of “No Meeting Wednesdays”. Aria Healthcare has a similar “No Meeting Fridays” rule. A more extreme form of this is practised at Southwestern Consulting, which only has meetings during their “Mad Meeting Mondays” and otherwise go meeting-free. Nothing mad in that, in our opinion.

For other companies less prepared to abandon meetings for an entire day, they might look into shortening meetings instead. In her hilarious five minute Ignite talk, ex Microsoft Product Engineer Nicole Steinbok suggests that the optimal length of a meeting isn't forty-five minutes, or sixty minutes, or (God forbid!) even longer.

Instead, she suggests scheduling twenty-two minute meetings, which fit perfectly into two per hour, without causing lateness. With enough prep they are long enough to get key things decided, and quirky enough to ensure that people don't request too many.

Other ways to ensure that meetings don't last for too long is to scrap the notion that they should involve sitting down. In many successful organisations, sit-down meetings are the exception rather than the norm, and standing or walking meetings are encouraged. Popular with startups who have limited time and resources to get things done, are Daily Stand-ups. Initially for tech leads' agile way of working, they are now widely adopted by teams of all shapes and sizes: 10 minutes max. One line only on your priority for the day. And everyone has to speak.

What's curious about these daily stand-ups is that they have been shown to improve creativity and teamwork, according to researchers Andrew P. Knight and Markus Baer. A variant of the standing meeting is the walking meeting. As well

as the opportunity for a good stretch, walking meetings are shown to increase creativity, according to Oppizzo & Schwartz's work for the Journal of Experimental Psychology a few years ago. No wonder they were a favourite for Steve Jobs and Sigmund Freud, no less.

With Meetings, Size Matters

Another major trend is to create greater variety in meeting attendance. A key benefit of standing and walking meetings is that they cannot accommodate as many people, forcing a more measured approach to inviting people. Jeff Bezos mandated years ago, that Amazon's internal innovation teams must be small enough in size that two pizzas would be enough to feed them if they worked late (suggesting this as a maximum size of a meeting as well). Project software firm Basecamp's founder Jason Fried is on record as saying he can probably count on one hand how many times they've had a meeting with more than four people!

At the other end of the scale, many contemporary organisations have copied the ever-popular all-hands meeting. Google and Facebook, despite their size, still run several all-hands meetings a year, with top executives and the CEO in attendance. While costly, these meetings are great for company culture, and offer both accountability and transparency through open, company-wide Q&As.

In all these cases, however, one truth remains the same: a meeting is only as good as its participants when they are engaged. Maya Bernstein and Rae Ringel's research for Harvard Business Review's article Plan A Better Meeting With Design Thinking, revealed that:

90% of people daydream during meetings, and 73% admit to doing other work during them. As technology exacerbates this, an important issue in designing the better meeting of tomorrow is how to create a truly focused meeting - or a mindful meeting, as I heard it called recently. The key steps here are to ensure that things such as laptops, tablets, and (perhaps most important of all) phones are kept out of the meeting unless critically necessary. In the future we may well see phone baskets as standard equipment at meeting-room doors!

No matter which approach you take, improving meetings in your company is a sure way to improve both productivity and employee morale. For companies who wish to succeed in the future, making this a strategic priority should be a no-brainer. Now, maybe we could schedule a meeting to talk about your meeting needs ...



Space



Deep Work In Open Offices?

In his book *Deep Work*, Professor of Computer Science Cal Newport points out that taking set periods of time for deep work – that is to say thinking deeply, imagining, innovating and creating – has set apart some of the world’s greatest thinkers. Today, this is something we all need to master.



Rather than supporting idea sharing and collaboration, open offices can actually lessen the volume of face-to-face interaction by around 70%, according to a study by Harvard University.





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Contemporary work increasingly demands the ability to focus intensely on cognitively demanding tasks, or as Cal Newport calls it, “deep work.” Newport notes that many workers find themselves in “distracting open offices where inboxes cannot be neglected and meetings are incessant; a setting where colleagues would rather you respond quickly to their latest e-mail than produce the best possible results.” He later continues, “in an ideal world – one, in which the true value of deep work is accepted and celebrated, we’d all have access to something like the Eudaimonia Machine”.

Greek philosopher Aristotle’s concept of eudaimonia relates to the epitome of human capability, and to Newport it describes “the highest state of flourishing”. So what do you think - are open offices really the enemy of deep work?

Baby boomers created the open plan life with best intentions – connecting people after fifty years of work being boxed into cubicles. However, what no-one knew in the 1980’s was what happened when the promised benefits of the open plan office met the cold, hard reality of contemporary office work.

Looking at what actually happens when offices go from closed to open, we can see that deep work isn’t

necessarily supported. Rather than supporting idea sharing and collaboration, open offices can actually lessen the volume of face-to-face interaction by around 70%, according to a Fortune 500 study by Harvard University’s Ethan Bernstein, published in August 2018. If you have actually tried to talk to a colleague in a wide-open, too-quiet office you’ll know why. We have all either received – or given – that polite glare that reads, “HALT co-worker! Do not think about asking me a question and show me up for not knowing in front of everyone!” #funnynotfunny maybe, but these moments cause anxiety rather than creativity.

Let’s be clear about what we’re talking about here with ‘open plan’. We do not mean a sea of desks, with no spatial breaks for as far as the eye can see, and which offers workers absolutely no privacy. Those are proven to be a disaster. What we mean are large working areas that have been designed to be open, airy and flow. Generally they house upwards of seventy-five people in one space, and shape the design of most modern offices today.

In their efforts to make work more collaborative, transparent and ‘creative,’ has the built environment as a global industry underestimated the value of focus-based work and its impact on productivity? Not just in our own working environs, but those we design and build? Have we

Data reveals a very clear pattern: two hours, per employee, per day of face-to-face collaboration is all that workers need.

built offices for deep work, or created open offices that encourage isolation through headsets and emailing?

The root issue lies in our assumptions. What goes for a tech company in a one-room, open office does not translate everywhere, especially to global corporations. Interior designers and architects created a story that we picked up from startups which looked 'oh so creative and connected!' and turned this into an inspiring tale of how modern offices should be if they too wanted to focus on creativity and innovation. The truth is that startups don't have money for much other than a room where everyone sits, nor necessarily the time to engage in deep work. This is where alternatives to the open office may well shine, and where the industry for the built environment can step in and help in the renaissance of deep work in modern offices.

An atmosphere and interior design that fosters collaboration is commendable. However, it is a false economy to think that less space = less cost, if that space comes at the cost of focus and concentration. According to a survey by UniSpace in 2018, with over two thousand global occupiers, leaders are introducing open-plan working believing they enhance productivity, without looking at the data. Survey data spanned four continents and multiple sectors, and consistently showed that the level of collaboration across the leading professions (including most in real estate) was less than 25% of an average workday.

UniSpace's data revealed a very clear pattern: two hours, per employee, per day of face-to-face collaboration was



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all that workers needed. "Organisations that plan for more than the two-hour average are unknowingly facilitating an overly-collaborative environment that is potentially disruptive" reported Unispace's Sam Sahni, Regional Principal, Strategy. Firms that tend to 'over-collaborate' he found, frequently created environmental barriers between various teams and departments, and ultimately created silos. They also lessen the amount of time in which people can engage in thinking of the kind that can engender the next great innovation.

This is not to say that the open office is a modern hellscape, nor that they cannot be made to work. However, we must become better at understanding the data we can gather about productivity and communication in different office setups, as well as become more appreciative of what is required for productive deep work. Only if we truly look to the data regarding workplace engagements before we design our work environments can we ensure the best fit between different kinds of work, different kinds of people, and different property cost centres.



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The Eudaimonia Machine – Designing Productivity

David Dewane is an American architect, entrepreneur, publisher and educator with a background in ecologically and socially equitable design. He has taken Newport's notions of deep work – that achieving the highest state of flourishing is indeed the core objective for the work we do – and worked from the principle that the primary goal of our workspace should be to intentionally design it to nurture, develop and protect intensive brain activity that delivers genuine results. He has done this through a conceptual design called the Eudaimonia Machine, which radically challenges how our offices are set up and structured.



© STORY

David Dewane's creation of the Eudaimonia Machine nurtures deep work through a one-storey rectangular building made up of five rooms. According to his original designs, a multipart, one level floor plan funnels employees through various spaces with the intention of triggering different mental states. This includes an entry gallery, a salon for socialising, a small to medium-sized multi-person office, a library, and chambers - a space designed for deep work.

Story, New York: An Experiment In Eudaimonia

New York's Story - a concept space for experiential retail and work space - created Work/Space in collaboration with Dewane to bring to life Deep Work's concepts, whilst simultaneously improving their workspace which was noisy and busy, distracting workers.

Dewane's design employs a linear progression through five spaces - the Gallery, the Salon, the Office, the Library and the Chamber. His vision is that these rooms follow a direct line from one to the next (but in reality worked around Story's space limitation via curved pathways). What matters most, Dewane told Architectural Digest, is that you build an

intensity in focus and then you unwind on your way out. By having these, he argued, an employee gears up mentally to prepare themselves for what they are about to do next.

The Gallery, Room One

"The gallery is about positive peer pressure," Dewane says. Walking in off the street, employees enter the Gallery. Supposedly a space that inspires through examples of deep work produced by [the organisation within] the machine, the Gallery provides encouragement and motivation.

The Salon, Room Two

Balancing this is the Salon. This is a room with a relaxed atmosphere, encouraging socialising and communication.

The Office, Room Three

In the middle comes the Office, with desks nestled around a couple of large tables, in what we typically think of as a modern open-plan office. Designed to feel laid-back, this is where 'shallow work' is done, with a friendly and collegiate atmosphere.

The Library, Room Four

This is what Dewane calls the “hard drive of the machine” - a quiet space for research and thought gathering. Organised with books, archives of work done previously, this is the perfect prep for the final room where deep work begins.

The Chamber, Room Five

This small, soundproof room is designed for Newport’s “deep work”. Cut off from distraction and interruption, the Chamber affords employees the space and peace to do their finest work. It is here that long-term value is created for the individual worker, and for their organisation.

Learning From Deep Work

For the most part, modern office design builds heavily on open-office layouts, contradicting Newport’s theory and the working environment that Dewane conceptualised to house it. We all know in real estate that finding the perfect design solution for a new office space is highly complex and requires trade-offs, and not everyone can manage an Eudaimonia Machine. But what can we learn from the example above about how office designs can work in harmony with productivity, wellbeing and happiness?

Productivity

The principles of deep work emphasise that different kinds of work have different requirements when it comes to being truly productive. This is at the heart of deep work, and the notion of “activity based working” (ABW) that has emerged out of Dewane’s work. A one-size-fits-all office design – which sadly is often the principle underlying open offices – misses out on the productivity gains from design for different kinds of work. Consider noise, often seen as the bane of the modern office. Workers get around this by requesting to work from home or hiding under headphones, both clearly showing a failure of design.

What the Eudaimonia Machine and ABW teaches us is that we need to see the diversity of modern office work. As we, as real estate leaders, try to introduce similar thinking in developing better workspaces, the following things should be kept in mind.

One, the dialogue should be opened early, and a vision for the new workspace should be widely communicated. Only through this will people be inspired to join in and talk about their experiences with workspaces. Two, bring in end-users early and encourage a broad-ranging discussion on the kinds of work and activities that the new space will have to cater for. Consider that, depending on what activities people are engaged in, different environments will be best suited for doing one’s best work. Three, allow for personalisation and “owning the space”, in the manner of the Eudaimonia Machine’s Gallery. Personalisation imbues a space with meaning, something necessary for deep work.

Wellbeing & Happiness

Another lesson from ABW and the deep work movement is that wellbeing and happiness shouldn’t be seen as disconnected from work, but deeply interrelated with the same. Designing for wellbeing and happiness is not just a question of being nice, it is an engagement with productivity and efficiency at work. The Eudaimonia Machine plays around with sight and sound not merely for aesthetics, but for how they affect people’s capacity to work.

Just consider lighting, which according to Paul Nulty (founder of Nulty Bespoke, a global bespoke lighting design practice) is central to wellbeing at work. In an interview with An Office Magazine, he revealed how personalised and concealed lamps that radiate softer-shaped light can improve people’s experience of the office. London-based innovation design engineer Leslie Nooteboom has designed and prototyped a way of managing natural light deficiency in offices through Komorebi, his lamp projector project. From the Japanese, meaning ‘sun dappling through the leaves’, Komorebi replicates the natural effects of the sun. Nooteboom’s mission is to help us feel less lethargic and more alert at the office, working with our circadian rhythms.

By moving away from a notion that all workers and all work require the same setting and setup, principles from ABW can help workers be their best selves. The industry for the built environment still has a lot to do in supporting this, but in the future of work, this will become a need-to-do rather than a nice-to-do.

The Eudaimonia Machine - A Conceptual Critique by DeVono Cresa



*By Joe Gillam
Director
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*By Shaun Dawson
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Office design has gone through immense change over the past 100 years. The evolution has been led not just by the type of businesses that occupy office space but by the proliferation of technology and the impact that this has had on the workforce. How, who and when we use office space are key factors to creating a productive and successful office design. David Dewane's Eudaimonia Machine serves as a good reminder that whilst design principles can guide us throughout projects, the dynamics of each office needs to be considered and approached with an open mind, as every client is different.

However what is perhaps missing from Dewane's piece of work is flexibility. We have found that an overriding requirement from clients, especially in the current economic and political climate, is they want the ability to flex their space - it is actually key to futureproofing an office design, to a certain extent. It might relate to the amount of space they have or how that space is used, something we saw play out in one of our recent projects, designing the new London HQ for Red Bull.

Red Bull sought to unite their workforce of contrasting teams into a single, connected space, each with a varying level of work depth and productivity requirement. The DThree team dived deep into the design details to ensure the layout could work for multiple teams, each with differing needs. Noise levels, focus times, arrival times for teams and individuals were just a few aspects that had to be considered, along with an array of diverse space configurations. Whilst this sounds similar to Dewane's five-

space principle, the similarity ends there.

The linear progression aspect of the Eudaimonia Machine would be difficult to achieve, especially in the types of office buildings that are available in London, where every square foot of space counts. In this instance, we were tasked with delivering a design that would achieve productivity whilst ensuring that everyone felt connected both culturally and physically to the space. Creating separate 'rooms' as per the Eudaimonia Machine, would carve up space and create isolated areas, counterintuitive to the needs of the business and the workforce.

The Eudaimonia Machine is an intelligent guiding design principle and of course inspiring in its own way, but it is almost impossible to achieve both a perfect floor plate and the perfect journey throughout the space. We believe that there are always trade-offs and compromises for clients. Our role is to reveal where we see the best value for them in terms of function and aesthetic.

Current office design demands flexibility, a space that provides concentration, contemplation and collaboration. All of which are vital in nurturing a productive workforce. Whilst we can identify synergies between Dewane's example in New York and our portfolio at DThree, we have also spotted the areas from which most designers are forced to deviate. Design will always stem from the client relationship, but that's not to say we can't be inspired and influenced by concepts such as The Eudaimonia Machine - that's the beauty of design.

When Two Become One



By Dr Lee Elliott
Global Head of Occupier Research
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Conventional wisdom suggests that corporate merger and acquisition (M&A) activity has a negative impact on demand in U.K. office markets. However the reverse may well be true.

An uncertain political and economic backdrop seems to have done little to suppress demand for office accommodation in the U.K. with the main office markets achieving new benchmarks during 2018.

In the Central London market, for example, almost 15 million sq.ft of space was let to businesses last year, a figure some 20% above the long-term average, and the highest

annual volume since 2014. It was a similar story outside of the capital. The M25 market witnessed a decade high of four million sq.ft of office space let, while the ten main cities of the U.K. also exceeded their long-term average by a fifth, with six million sq.ft of space let to a broad spectrum of business users.

New Drivers Of Office Demand

It is clear that despite operational uncertainty, the office occupier is active. In my view, they will continue to be so, for two reasons.

First, real estate has a new standing as a business tool. It is no longer simply a business cost to manage downwards; no longer just a

necessary factor of production; no longer merely a container in which to put people. Instead, it is a strategic device used pro-actively by business leaders to support, facilitate or portray strategic business transformation. Indeed, this was a key finding of Knight Frank's recent (Y)OUR SPACE report. Eighty-six percent of the global corporate real estate leaders of 120 of the world's biggest firms view real estate as a strategic device that assists wider business goals relating to strategic issues such as talent management, corporate branding, employee wellness, business innovation or, importantly, changes in business structure.

It is these changes in the structure, culture and constituents of business that represent the second

driver of office market demand. Every business sector is being dramatically disrupted by the onset of digital technology. As a result, all businesses are being reshaped by the need to develop a different go-to-market strategy and customer experience that is more appropriate to the digital age. This, in turn, is forcing a rapid and regular reconsideration of the quantum and qualities of required staff; the underlying business culture (with innovation, rather than scale, being the key to business competitiveness) and the organisational structure of the business.

This last point of structural change is important. Businesses are changing shape with an ever-greater frequency and significance. For example, we have seen the emergence of corporate fissure, whereby established companies such as Hewlett Packard have responded to the new digital reality by breaking down into new separate entities. However, by far the most obvious manifestation of this structural change has been the dramatic increase in corporate M&A activity.

Recently released data by the Office for National Statistics (ONS) found that acquisitions of UK companies by other UK companies hit a ten-year high last year, with some £26.5bn of deals completed. Furthermore, takeovers of UK companies by foreign firms doubled year on year in 2018 to stand at some £71.1bn. This is set against a global backdrop, which according to leading data and intelligence provider Mergermarket, saw some US\$3.5 trillion of corporate M&A activity in 2018, spread across more than 19,000 transactions. As businesses are disrupted and challenged, M&A activity is becoming a strategic

response by those with the financial clout to dominate or those who need to bring radical change to their organisation in order to remain relevant.

The Real Estate Market Significance Of M&A Activity

M&A activity has however been somewhat of a blind spot for those forecasting the future demand profile of the UK office market. Whilst recognising that such activity can serve to reduce the presence of occupiers in some markets, I believe M&A to be an important stimulus of future demand.

The key reason for this is that the character of M&A activity is changing quite markedly. There are, as outlined, lots of deals being completed but the individual deals are themselves becoming more significant with a growing proportion of deals falling into the category of mega-deals – that is with a total value in excess of \$10bn.

Still more significant is that a growing proportion of the deals are what economists refer to as horizontal rather than vertical integrations. Put simply, a larger proportion of deals are occurring across rather than within industry sectors. The big deals in the market are increasingly seeing companies buying companies in completely different sectors which are ripe for technological transformation or which provide access to new capabilities and skills.

This activity extends the power of disruption. When a company with the clout and technological know-how of, for example, Amazon enters into a completely different sector its impact transcends the confines of

the merger itself. So, if Amazon were to go into the healthcare sector they would create a powerful new market entrant that would send strong shock-waves through the entire sector. Traditional sector incumbents would have little choice but to react and respond. They do so by changing their own business structures, their operational model and, in some instances, by themselves combining forces with other entities. In this sense, horizontal M&A activity creates a much broader demand stimulus for office markets than simply the individual deals themselves.

There is a further interesting dynamic occurring. Historically, a corporate merger makes financial provision for the running of duplicated real estate portfolios for around 2-3 years. Thereafter, the new merged entity has typically reviewed its extended occupational portfolio, made choices about which properties to retain and which to exit, and then transacted in the market accordingly. However, this process is changing.

In an age where real estate is a device to facilitate, support or portray business transformation it is more likely that the new entity formed by the merger will remove itself from much of its legacy portfolio and take on completely new offices that serve to embolden the brand of the new business.

In this sense, the coming together of separate businesses through an M&A deal will stimulate further high levels of occupier demand within the UK office markets over the next five years. Such deals further embody the notion that, from a real estate perspective, business disruption equals ongoing market demand.

The Secret Sauce Of Designing Around Wellbeing

A Case Study By British Land

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Whether or not we are aware of it, the physical spaces where we spend our lives have a significant impact on our physical and mental wellbeing. But in a world where an entrepreneur needs a superfast internet connection more than she needs a physical office, what is it that the physical environment can bring to a growing business that digital space cannot?

Anyone who has visited a busy city or office will be familiar with how their senses can feel overloaded by competing sights, sounds, smells, cluttered spaces and crowds of people. Conversely, a place designed to consider all these factors can improve productivity, create a more open mindset and engender happiness in the people who spend time there. Our surroundings and their design affect what we do, how we do it and how we feel: the prize is to design in the positive drivers that can help individuals achieve success and fulfilment.

In 2015, we worked with Happy City to supercharge our approach to creating outstanding spaces. Research showed that happiness and wellbeing are good for business: happier employees are more productive; happier retail staff offer stronger customer service. As a result, businesses are increasingly interested in the quality of the environments they occupy, and economic geographers have found

environments that promote more face to face interactions correlate to stronger GDP growth and creativity.

We decided to put this to the test at British Land, taking our own traditional office and completing a renovation that transformed our entire working environment. To assess the impact, we asked staff to complete a survey before and after the work had taken place and the strength of the results changed our entire approach to design.

The proportion of employees who felt that the work environment supported productivity rose from 67% before the renovation to 88% afterwards; 82% of people felt that the new design - which included connecting the three floors via a wide, open central stairway - supported their physical wellbeing, compared with 64% in the original design; Most importantly, 95% felt that the new design had a positive impact on British Land's culture, compared with 55% before the renovations. We were particularly delighted to see that 99% of people found the new environment 'enjoyable' as this is a key component of the wellbeing principles that we created with Happy City in our research phase.

We now design every British Land space around these seven principles, seeking to increase the wellbeing of thousands of people who use our spaces every day, and the success of the businesses that occupy them. At Paddington Central, we've invested £10 million transforming previously sterile stretches between buildings into varied and



© British Land

delightful green spaces with cycle routes, sociable pockets of outdoor seating and mature trees, as well as an engaging digital art installation created as a tribute to local computer scientist, Alan Turing. Inside our buildings along Kingdom Street you'll find vibrant social spaces that are open to all, green environments, coffee spots and roaming reception teams who are bringing a new type of welcome to visitors.

These measures have transformed the public space, creating areas where people from across the campus now connect and spend time and supporting the location's visible improvement and attractiveness to new, growing occupiers.

The World Health Organisation reports that many people in Europe now spend over 90% of their time indoors. As the boundaries blur between work and leisure, this has led to a growing interest in 'healthy buildings' too. This is about employers recognising that the right working environment can help them attract and retain talent as well as improve productivity.

Studies show that access to greenery and other natural elements boost mental health. Enhanced air quality has been linked to improved cognitive function. Shared spaces and recreational opportunities encourage social relationships, one of the most powerful drivers of human health and wellbeing. At our 100 Liverpool Street development in Broadgate, London, we are exploring this research further, partnering with the International WELL Building Institute to test their WELL Certification.

This focuses on innovations to promote health and wellbeing through the quality of the physical environment and by facilitating healthy lifestyles, based on specific areas of focus: fresh air, natural daylight indoors, design that encourages fitness, high quality drinking water and healthier food choices, comfortable levels of noise, temperature and access and helping people to connect by designing landscapes with nature and green spaces. Individually, none of these would transform a life, but together they create an holistic framework that can make a real difference to every individual using the space.

Workplaces have an important role to play in preventing ill health before it occurs. Active design can get people moving more, reducing their risk of cardiovascular disease, depression and other health issues. This is important for individual businesses, which benefit from engaged, healthy, resilient employees, as well as for the UK as a whole, which could save £15 billion by 2050 if we began to put wellbeing design principles at the heart of all urban environments from today.

We take our surroundings for granted. Yet they uniquely influence every decision we make: from how we travel to whether we socialise, from how safe we feel to our openness to new ideas. For business seeking an edge through a creative, collaborative and positive culture, a work environment designed around wellbeing could be the secret sauce.

Work, Rest & Play

With a workplace, we obviously mean a place for work. However, looking to the future of work and the workplace we can clearly see a number of trends that suggest we need to think beyond simplistic ideas of work and start engaging with other parts of the human experience. Work is important, but the company aiming for success needs to pay attention to both rest and play, in order to ensure optimal performance. In the following, we want to look to the future of rest and play in the workplace, and the ways in which these can enhance work and create value.





ON

BIRMINGHAM

In the workplace of the future work, rest, and play come together. Rest supports work by making us more focused and productive. Play supports the business of the company by finding new ways forward before others do so.

Rest and sleep might seem like the opposite of work, but in fact they are tightly interlinked. In their 2016 report, *Why Sleep Matters*, the RAND Corporation estimates that across five key OECD countries (US, UK, Germany, Japan, and Canada), a staggering £535 billion are lost yearly due to insufficient sleep. In the UK alone, more than 207,000 days (567 person-years) of working time is lost annually because employees do not get enough sleep! For the real estate industry alone, that's more than 11,000 days lost, making the cost of deficient rest tremendously high.

Sleeping On The Job

No wonder, then, that more and more companies are exploring the benefits of better sleep. At Google, VP for Real Estate and Workplace Services David Radcliffe has stated, "No workplace is complete without a nap pod." Nike agrees, and has installed 'quiet rooms' at their Portland headquarters and encourage staff to use them for power naps or meditation during work. NASA has done extensive research on the performance gains associated with workday naps, and now mandates them. This practice has spread in the aeronautics industry, where many pilots take 'NASA naps'.

In the office of the future, quiet rooms might become standard, but companies can also take Google's lead and explore the use of nap pods. These can either be larger capsules of the kind made famous by Japan's "capsule hotels", or look more like reclined seating with a cover that ensures limited light and outside noise. Regardless of which type one uses, such pods enable workers to take 10-15 minute power naps without falling into deep sleep, a technique suggested to greatly increase workday productivity. In a similar manner, research suggests that meditation during the workday can be an efficient way to de-stress and improve focus. Apple offers employees classes on meditation and yoga on-site, has dedicated meditation rooms, and allows employees to take 30 minutes of work time a day to meditate. Considering their commercial success, maybe we should all learn from them.

Rest in the office, then, does not fly in the face of work and productivity. On the contrary, many companies have found it both increases employee well-being and improves the bottom line. But once the employee returns from a power nap or meditation, things are all business, right? Well, not necessarily.



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Strategic Game Play

If there is one thing that defines the contemporary competitive environment, it is constant disruption. Innovation has gone from something that occurs once in a decade to something that can topple established firms in a few years. The rapid development of technology and a bevy of new business models mean that contemporary companies need to have a focus on creative experimentation, so as not to fall behind. In other words, companies need to make play a strategic priority!

Here, play is not the opposite of work, but rather a special kind of work. It is the work of curiosity and testing, of exploration and acceptable failures, and our offices are rarely built for this. Part of the reason is that we often design for the timeframes of the normal organisation – financial quarters, end-of-year reports, annual holidays and celebrations. Play works differently. As Michael Schrage (2016) suggests in his *The Innovator's Hypothesis: How Cheap Experiments Are Worth More than Good Ideas*, testing out novel ideas should be done in weeks to validate them. Playing means testing one thing, and then another, and requires a workspace that is tolerant of pop-ups, temporary testing grounds, and the rapid construction of prototypes.

Designing a future-ready workspace, then, requires balancing the need of the “normal” corporation – permanent offices and workplaces, dedicated meeting rooms – with something far more fluid and adaptable. As global design and architecture firm Gensler detail in their 2015 report *The Future of Workplace*, adaptability is a key part of how workplaces need to be built in the future. This is in part to be able to attract top talents, who expect offices to work with rather than against them, and in part to ensure that the company can develop with the times. They also highlight how more and more companies strive to bring people “under one roof”, so that the more staid parts of the company work side-by-side with colleagues engaged in play and experimentation.

In the workplace of the future work, rest, and play come together. Rest, even in the workplace, supports work by making us more focused and productive. Play, specifically in the workplace, supports the business of the company by finding new ways forward before others do so. All of these aspects are needed, and in the best workplaces they co-exist, in harmony.

The Future Of Organisations Is Healthy, Happy & Green



*By Ann Marie Aguilar
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We spend more than 90 percent of our time indoors, which means that buildings and everything inside, from the air we breathe and the water we drink to the furnishings and fixtures we use daily, can have a profound effect on human health and wellness.

Across the industry we've made amazing progress in ensuring that environmentally sustainable buildings are the new norm. Today green building is a global movement, and it's easy to understand why green building certifications have been widely accepted as best practice across the globe. The proven energy and water efficiency, waste and greenhouse gas reduction that underpin every certification deliver a meaningful contribution to universally accepted global goals. And they save money.

It's now time to expand our focus to improve the health and wellness of the people who live, work and learn inside the buildings. It is becoming increasingly clear that we must harness the places we inhabit for work, living, knowledge and fun as a tool to promote our personal well-being, just as the green building movement of the past two decades has come to symbolise environmental sustainability.

Building strategies that address our most basic human needs include design features as well as operational and policy protocols. Think of performance metrics such as air and water quality, lighting and comfort, as well as how the environment can promote healthy eating, physical activity and cognitive health. Creating healthy corporate cultures that weave in opportunities for mindfulness or connections to nature alongside the chance to rest and recuperate also provide important opportunities to enhance people's happiness, satisfaction and productivity. As the premier building rating system exclusively focused on health and wellness, the WELL Building Standard™ (WELL™) utilises a holistic, evidence-based approach that addresses physical and mental well-being across all these metrics.

And it's not just an "either or" proposition. Health and well-being are natural complements to sustainability, and both factors are critical when delivering a high quality building. We believe that organisations can and should look at ways to improve how their buildings perform, as well as how those buildings support the people inside to perform their best. Because WELL works harmoniously with international leading green rating systems such as BREEAM, LEED, Green Star and the Living Building Challenge, organisations can use both to positively impact the planet and people.

Building owners, developers and operators, as well as corporate tenants, are taking notice of the impact healthier

indoor environments can have on people. The physical workplace has undergone significant changes in recent years, with companies recognising how design, construction and operation decisions can positively contribute to their employees' health, happiness, satisfaction and productivity.

The extraordinary adoption of buildings that support people's health is a strong indication of the value to both tenants and building owners. Last year we saw WELL surpass 300 million square feet of projects across more than 40 countries, and more than 20 percent of global adoption is originating in Europe.

For companies, investing in people and helping to improve their physical and mental health can be an economic approach as well. Approximately 90 percent of corporate expenses are tied to salary and benefits, which means the return on investment from healthier and happier employees can lead to tremendous cost-savings. So when employers optimise their workplace environments and cultures to encourage healthier behaviours, they are indirectly optimising employee productivity and performance.

As financial groups move to include health and wellness into their portfolio evaluation criteria, building features that promote health and well-being increase the value of the building based on greater input potential. Leading institutional investors are increasingly incorporating environmental, social and governance (ESG) performance of real assets into their investment process. As an example, GRESB, which assesses the sustainability performance of real estate and infrastructure portfolios and assets worldwide, now includes a "Health and Well-being Module" to evaluate how property companies and funds are promoting health and well-being.

As a result, we're seeing organisations begin to take a portfolio-wide approach when reviewing how they can support people's health and well-being. In response to these demands, WELL now provides a streamlined, cost-effective option for making incremental design, operational and policy improvements over time and achieving certification as an endpoint. This ongoing journey provides a pathway for implementing changes at scale and gives organisations a meaningful way to communicate to employees and stakeholders across the spectrum that health is a high priority for all.

By putting people at the centre of design and construction decisions, we can add meaningful value to real estate assets and organisations, generate savings in personnel costs and enhance the human experience. That sounds like something that's well worth it.

Inside The Sentient Workplace

“The power of good design should not be underestimated. It is no longer something nice to have, but a necessity for any organisation that is looking to attract and retain the best talent.” Linda Morey-Burrows, Founder and Principal Director, MoreySmith

It is nigh impossible to discuss the future of design-centric workplaces without discussing the thought-provoking ideas in MoreySmith’s report, *The Future of the Workplace*, produced in collaboration with The Future Laboratory.

The report describes the future workspace as being sentient and designed with the end-user clearly in mind, so that the workplace offers more than just a space to work and becomes an integral way of caring for our wellbeing, productivity and happiness.

In describing sentient design, Morey-Burrows encourages us to ‘imagine a workplace that monitors our energy, physically, emotionally and mentally. Sentient workplaces monitor when we should eat and our levels of exhaustion,

it is a space that oxygenates and perfectly chills the air around your desk to counteract any chance of an afternoon slump.’

Of course, we are not there yet, and the report goes on to discuss trends that are only emerging now. As the report explains, sentient workplace design builds from human-centric design, and as such, it won’t be long before sentient design is part of modern office life. With Generations X, Y and Z assessing organisations on their ever-growing levels of ‘give’, it is logical that building sentience into real estate design is where we as an industry must now focus.

With wellness now the primary lifestyle focus for zillennials, it is no wonder the Global Wellness Institute’s report *Future of Wellness at Work* projects wearables, tracking apps and smart furniture that optimise performance and happiness will become commonplace in the future.

No one can argue that enabling deep work and offering a collaborative community are not founding principles for modern organisations today.



© Second Home

Second Home, London Fields - Sentient & Inclusive

Designing for both gender and ability balance is central to sentient design. Thinking about the type of furniture women will need during pregnancy is basic, but rarely considered and designed for. Nor are workplaces with services that help mothers and fathers who are working and simultaneously required to look after their young children.

One such example is the eco-aware co-working group, Second Home. In their London Fields space, for the first time in the UK, there will be a nursery. In collaboration

with Stoke Newington's N Nursery & Family Club, Second Home offers a (soundproofed) crèche, baby-feeding facilities and a buggy and scooter parking zone.

We at Holtby Turner believe that no other single incentive - be it a tax break or change in child welfare provisions - will help boost economic growth in the future more than proactively making a return to work for mothers less of an ordeal, emotionally, psychologically and financially.



© WeLive

The Extended Home

This trend is far bigger in the US than the UK, driven largely by the long commutes and deeply engraved hospitality culture. It is no surprise that spaces such as kitchens and games areas are part of what are known as Hospitality Workspaces - created specifically to bring work and life balance and as a key hiring tool in an ever-increasing global war for top talent. Sharing space with like-minded communities in a collaborative way offers an extended family to a generation where over half come from divorced parents. Whether when working or after work, curating services that are part of the younger generation's lifestyle is a trend set to stay, especially as a way of luring top talent.

Wellness, experiential down-time activities and on-demand hospitality is part and parcel of life for younger generations.

WeWork. WeLive.

As an undisputed leader in innovative space creation, what WeWork does commercially is likely to set the pace for the rest of the global real estate industry. So, as co-working rapidly flows more into co-dwelling, so the multi-billion dollar space provider has entered the arena with their latest venture - WeLive.

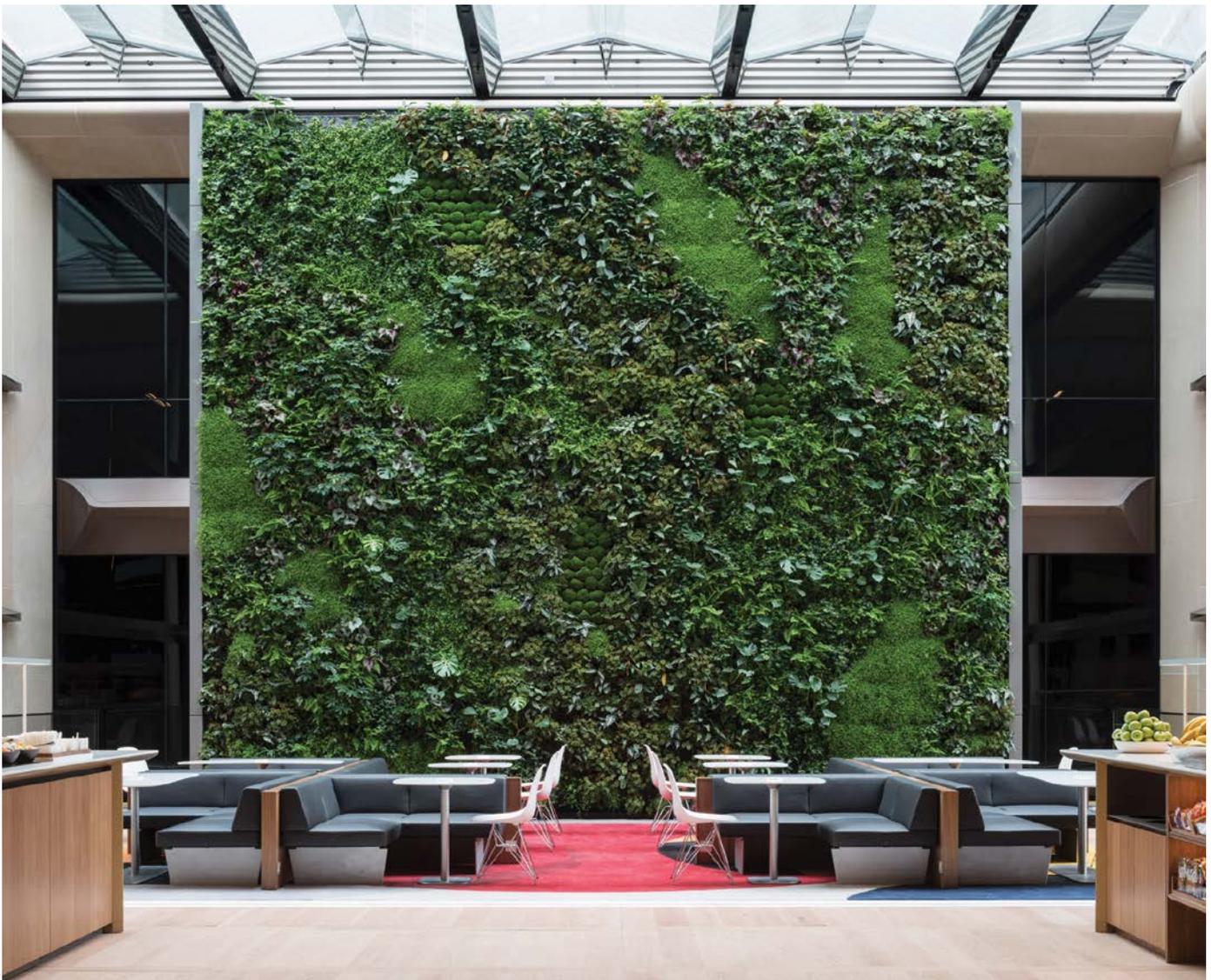
In a time where affordable shared lifestyle-housing is almost impossible to find in NYC, and younger generations are used to a co-working community way of working, it seems an obvious next step for WeWork to take what Antony Slumbers has perfectly termed "SpaceAsAService" and turn an ethos of commercial hospitality into a residential one.

Offering top locations, beautiful contemporary furnishings and a 24 hour concierge, WeLive offers "a new way of living built upon community, flexibility, and a fundamental belief that we are only as good as the people we surround ourselves with." Towels, linen, hairdryers, morning coffee, and every single possible piece of tech one could wish for, are all offered as personalised via IoT-connected systems. Of course, in WeWork style, there is a full-time concierge and housekeeping team too. Community-driven common areas, such as a Chef's Kitchen, arcade and yoga studio are included alongside WeWork's usual community events.

Once again, WeWork's business model is the clincher - all this with just month-to-month flexibility, and the option to book it as one would a hotel, for a few nights here and there. Studios begin at \$1500 a month and 4-bedroom apartments \$7,600 dollars. Perhaps affordable is better phrased as 'attainable' at almost £6,000 a month for a 4-bed apartment. Possibly this is something that will extend from their office sites in some regions. Who can second guess what WeWork will do?

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*Linda Morey-Burrows
Founder and Principal Director
MoreySmith*



A futuristic, brightly lit hallway with a grid pattern on the floor and ceiling, leading to a dark doorway at the end. The hallway is composed of white walls and ceiling, with a floor that has a grid pattern. The lighting is bright and even, creating a clean and modern atmosphere. The perspective is from the end of the hallway, looking down its length towards a dark doorway at the far end. The grid pattern on the floor and ceiling is composed of thin, dark lines that create a sense of depth and perspective. The overall color palette is dominated by white and light blue, with a dark doorway at the end providing a focal point.

Looking Forward To 2030



David George
Managing Director
iPWC Ltd

Let's look back 20 years and remind ourselves what was happening in the world; the worry of how the millennium would impact technology, the fight against email generated viruses (remember the Melissa strain?), the stock market's worst fall, Yahoo bought GeoCities and Microsoft was successfully prosecuted as operating as a monopoly. The first live webcast of an international football match took place and Britain's first internet-only bank opened.

Today? We have more of the same, plus vastly greater choice and the accessibility of data and the means by which we are able to capture, retrieve, interrogate, process and produce more, automatically, has developed beyond recognition.

Looking forward 10 years? Many routine tasks will of course continue to be automated, and app development will come on leaps and bounds, even allowing us to control within eye movement alone. Communication technology will advance with 'virtual presence' facilitating a feeling of better engagement with remote colleagues when collaborating and in meetings, enabling an open communication structure, eroding structural hierarchies in organisations and allowing interactions at all levels. That said, there's only so much communication that can be achieved on video, the phone and messaging.

Our behaviour and habits have adapted more slowly to this technology surge, for I believe we still need a sense of belonging gained through face to face contact. We enjoy these interactions with each other to help us deepen our relationships and to do our best work. We learn fastest by being physically present with others. So, what does this mean for work and the workplace?

Remote working will become more acceptable and the 'norm' for many job functions, but not all. The recent move to the "co-working coffee shop design" will continue and, as we are starting to see today, these models are being developed and refined, improving the acoustics and the ability to meet more privately with upgraded technology solutions.

The office of 2030 will be about less 'ownership' of space and furniture items - on a macro and micro level - and more about the sharing of facilities and work settings which will be specifically designed to enable both formal and informal collaboration. We'll make use of all these technological enhancements and will thus see less work traditionally carried out at desks but not in quite the same way we imagined 'Tomorrows World' as per the forecast from the 70's.



Chris Rowley
Independent Advisor

Predicting the future of work and the workplace is always very difficult, and when you are looking out to 2030 at a time when so many things are changing so quickly it becomes almost impossible. Eleven years ago the iPhone had only just been launched and Blackberry reigned supreme in the workplace. So thinking about how technology has changed the workplace in the past gives us some clues as to what to expect in the future.

Over the last couple of decades our working environments have been transformed by technology. In the 1990's we saw the widescale roll out and adoption of laptops and over the last twenty years since, are seeing improved collaboration tools, mobile computing, apps and connectivity everywhere.

Looking forward to 2030 I think it will be hard to overstate the transformative impact of Artificial Intelligence on service businesses. In the short term it will bed in more slowly than we may expect now, but over a five to ten year timeframe office-based roles will change significantly as A.I. starts to deliver more repetitive analytical and customer interactive activities as a matter of course. Contact centre and entry level roles in professions such as Legal and Accounting will be among those most impacted. What does this mean? I predict that we will need less workstations for analytical activities and more space for collaboration, creation and communication.



John McDonald
Corporate Development Director
GRAHAM Group

Forecasting the workplace of the future with certainty is not an exact science.

Nevertheless, shifts in demographics, fundamental changes in society, and the unstoppable trajectory of technology dictate that the traditional concept of the working environment is disappearing, and fast.

If the last ten years are a barometer for change, then, by 2030, we can comfortably predict that the pace of change will be rapid and its impact profound.

The rise of WeWork is a case in point. Launched in 2010, the shared-space group has become the largest corporate office occupier in central London.

At the very heart of the question is "work" itself.

The implications of our modern, globally connected world mean that the nature of work is undergoing a transformation, the likes of which we have not seen since the industrial revolution.

Digitisation, automation and Artificial Intelligence continue to pervade every aspect of our working lives – a trend that is only going to gain a stronger foothold in the years to come.

This direction of travel presents both very real challenges, and opportunities, for jobs and skills.

Jobs have become ever more fluid and work patterns have altered considerably.

Naturally, as work evolves, so too do our workplaces.



© Google HQ Charleston South Interior

While the process is well under way, in a digitally focussed world the notion of physical office space where employees punch in from 9-5 and sit at a desk in an open-planned office will be redundant.

Above all, employees now expect much more than a table and chair from their place of work.

And, employers must meet these rising demands of their workforce in a highly-competitive marketplace.

Therefore, the workspace of the future must be designed to promote general wellbeing, improve employee engagement and champion collaboration – proven factors that help to slash absenteeism, boost productivity and enhance performance.

It will feature characteristics of innovative interior design, ergonomic furniture and flexible space to promote collaboration, quiet zones to improve focus, and facilities to encourage social interaction – all of which will strengthen staff retention.

As we grow older and work longer, it also has to flexibly accommodate the needs of a multi-generational workforce.

Another developing trend is the acceleration towards serviced offices and managed spaces for co-working as organisations adopt a decentralised approach, moving away from the conventional company headquarters model to smaller, widespread satellite bases.

Offering control and agility, these vibrant offices provide the functionality to add or remove space depending

on a range of factors, including expansion, and help to promote entrepreneurial networking and creative thinking.

But it is smart technology and Artificial Intelligence that will have the biggest impact on workspace through data driven decision making.

Connectivity and the Internet of Things mean that smart buildings will integrate everything from access, lighting, heating, security, cleaning and catering across a single network, enhancing the end-user experience in the process.

Sensors, for example, will function intelligently to adjust the temperature or lighting dependent on individual preferences.

For employers, landlords and facilities managers, the advent of digitisation and data analytics is central to the efficient operation of buildings. This influence will be maximised by 2030.

Presented with information at the touch of a button, real time analysis of every facet of a building's performance is possible which is critical to the evaluation of costs and driving improvements.

Digital disruption is already shaping workspace, and, without question, by 2030 its impact will have transformed the "office" forever.



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