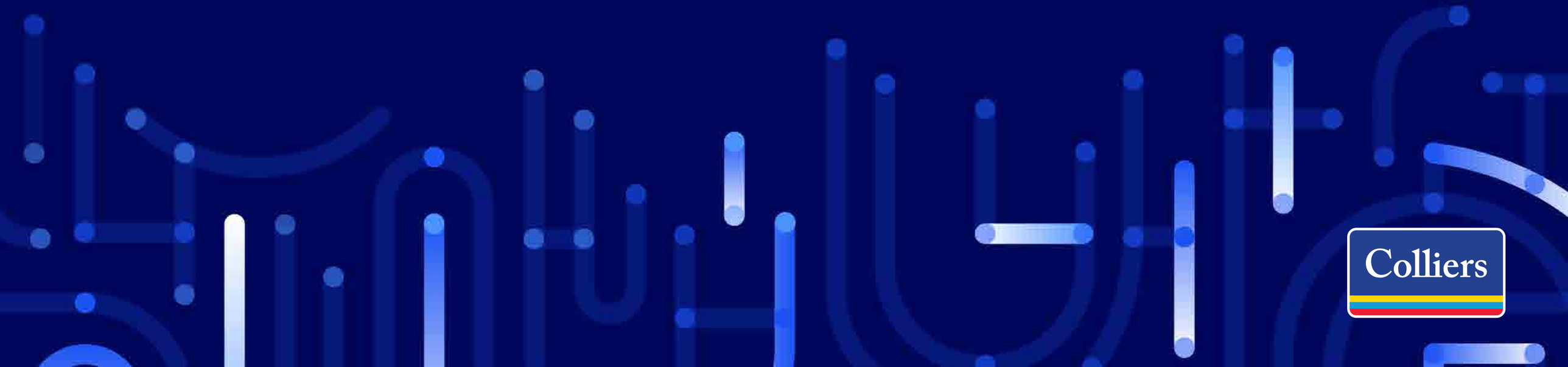
COLLIERS ASIA PACIFIC OCCUPIER SERVICES

AI in Corporate Real Estate

The now, the next and the possible.



Colliers

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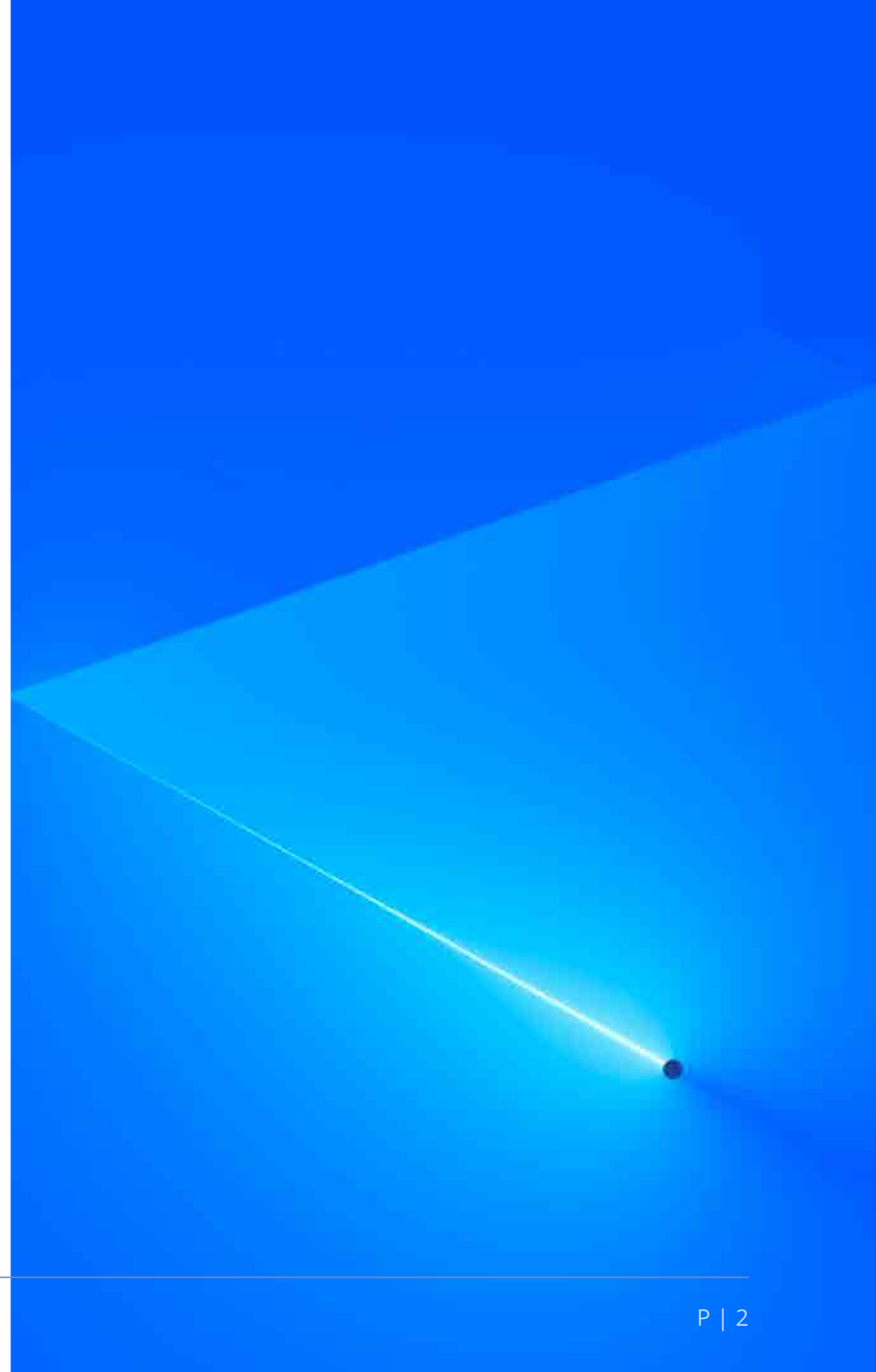


Overview

This report highlights the untapped potential of Artificial Intelligence (AI) in corporate real estate (CRE) Occupier Services, showcasing opportunities we have unlocked across all service lines in Asia Pacific and globally to enhance business.

AI offers immediate breakthroughs and long-term benefits. To thrive in the digital world, it's crucial to evaluate use cases for impact and anticipate their influence. As AI evolves, its implementation in various aspects is evident.

As one of the most impactful and transformative technologies, Generative AI is powering users to achieve new levels of productivity, creativity, and effectiveness and is changing the ways organisations do business, and their thinking around digital innovations to propel their businesses.

Generative AI's impact on productivity could add trillions of dollars in value to the global economy – an estimated $2.6 trillion to $4.4 trillion annually. (1)

(1) Economic potential of generative AI | McKinsey 2023

Types of Artifical Intelligence

Colliers has classified AI based on six categories outlined to the right; while this paper doesn't explore the entire spectrum of AI, we focused on select areas currently being utilised or likely to be utilised in the near future.

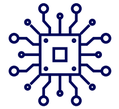
When examining the current landscape of AI in CRE, the majority of efforts to date have been concentrated on the highlighted categories. We explore the art of the possible in this paper and illustrate areas where all six categories can be utilised to their fullest extent.

Natural Language Processing

Understands, generates and interacts with human language.

Expert Systems

Mimics decision making abilities of a human expert in a particular domain.



Generative Models

Generates content such as images or text based on large data sets.

Machine Learning

Learns from data and improve its performance over time.

Predictive Analytics

Analyses historical data to make predictions about future trends.

Computer Vision

Analyses and interprets visual information from the world.

Five focus areas for AI Implementation

The novelty of AI creates challenges that can hinder the deployment of exciting use cases. However, by implementing robust data management programs, we can make significant progress in unlocking the full potential of AI across various services.

Colliers experts are available to help you overcome these obstacles and implement the AI strategy that best suits your needs.

Transparency

Data across CRE firms and businesses are often non-standardised and, most importantly, closely guarded as proprietary information. This systematic hindrance will need to undergo a transformation for CRE companies to utilise AI's full potential.

Comprehensive Data

Limited and biased data in AI applications can lead to varied results; to maximise AI benefits in CRE, comprehensive data across organizations is necessary for accurate benchmarking and trend forecasting.

Governance

For success in the evolving landscape, clients and providers need to create data governance programs or content libraries that support increased data sharing. Data governance programs should focus on minimising risk, ensuring accuracy and consistency, and enabling more effective data utilisation.

Data Volume

The CRE industry is abundant with data on markets, leases, and transactions, which is vital for training AI systems for intricate tasks. Ensuring this training is not skewed by biased or incomplete data sets is essential for effective AI application.

Data Management

Efficiently managing the vast data within the CRE sector is key to maintaining its integrity and ensuring its accuracy and effective use. It also involves regulating access, both granting and restricting it appropriately. Data management contracts between all parties involved are critical to uphold these standards.

AI’s Projected Impact in Asia Pacific

The Asia Pacific generative AI market size was estimated at USD 4.25 billion in 2023 and is expected to grow at a compounded annual growth rate of 37.5% from 2024 to 2030(2).

Singapore tops the list of Asia Pacific countries for AI readiness, according to Salesforce AI Readiness Index 2023 (3), which also revealed that Australia, Indonesia, Singapore, New Zealand, and Thailand have improved their overall AI readiness score since 2021.

Generative AI drives significant economic opportunities in Asia Pacific. In Australia (4) for example, generative AI is estimated to contribute up to AUD 115 billion (around USD 76 billion) annually to the economy by 2030, depending on adoption and how workers transition to other tasks. In Japan, it is estimated that generative AI could unlock JPY 148.7 trillion (around USD 1.1 trillion) in productive capacity. Singapore (5) is expected to be among the leaders of this AI revolution within the region, with AI adoption in Singapore expected to provide economic benefits of up to SGD 198.3 billion (USD 147.6 billion) in 2030.

(2) Grand View Research - Asia Pacific Generative AI Market Trends (2024-2030) (3) Salesforce 2023 Asia Pacific AI Readiness Index (4) Australia’s Generative AI opportunity – By Microsoft and Tech Council of Australia (2023) (5) Strengthening Singapore’s AI Leadership with Google - Access Partnership (2024).

AI’s potential impact on CRE service delivery

“We are leveraging AI to provide the most effective solutions for our clients’ biggest challenges. From portfolio strategy to lease administration, workplace strategy to location intelligence, project management to facilities management and transaction management, AI is revolutionizing the industry. In this Report, we look closely at some of the ways AI is impacting CRE in Asia Pacific.”

Mike Davis
Managing Director
Occupier Services
Asia Pacific

“For CRE, AI is going to impact every service line by creating new tools to improve service delivery. Whether it’s looking for a new location, understanding how to optimize your portfolio or designing the right space for your employees. AI will allow you to use more data, faster, and provide more options to help you make informed decisions.”

Chris Zlocki
Head of Client Experience
Executive Vice President - Occupier Services
Global

Workplace Advisory

Automated algorithms to generate different occupancy and 3D space options.

Lease Administration

Leverage OCR AI technology to streamline management processes.

Portfolio Strategy

Predictive analytics to continuously seek to optimise portfolios.

Facility Management

Anticipatory building maintenance and automated equipment notifications.

Project Mangement

Recommen-dations for lowest cost and optimal re-source allocation.

Transaction Management

Self-guided survey of location options supported by automated workflows.

Location Intelligence

Proactively search for new and emerging talent pools and locations.

Supply Chain Solutions

Predict real time adjustments to the demand forecast or inventory requirements.

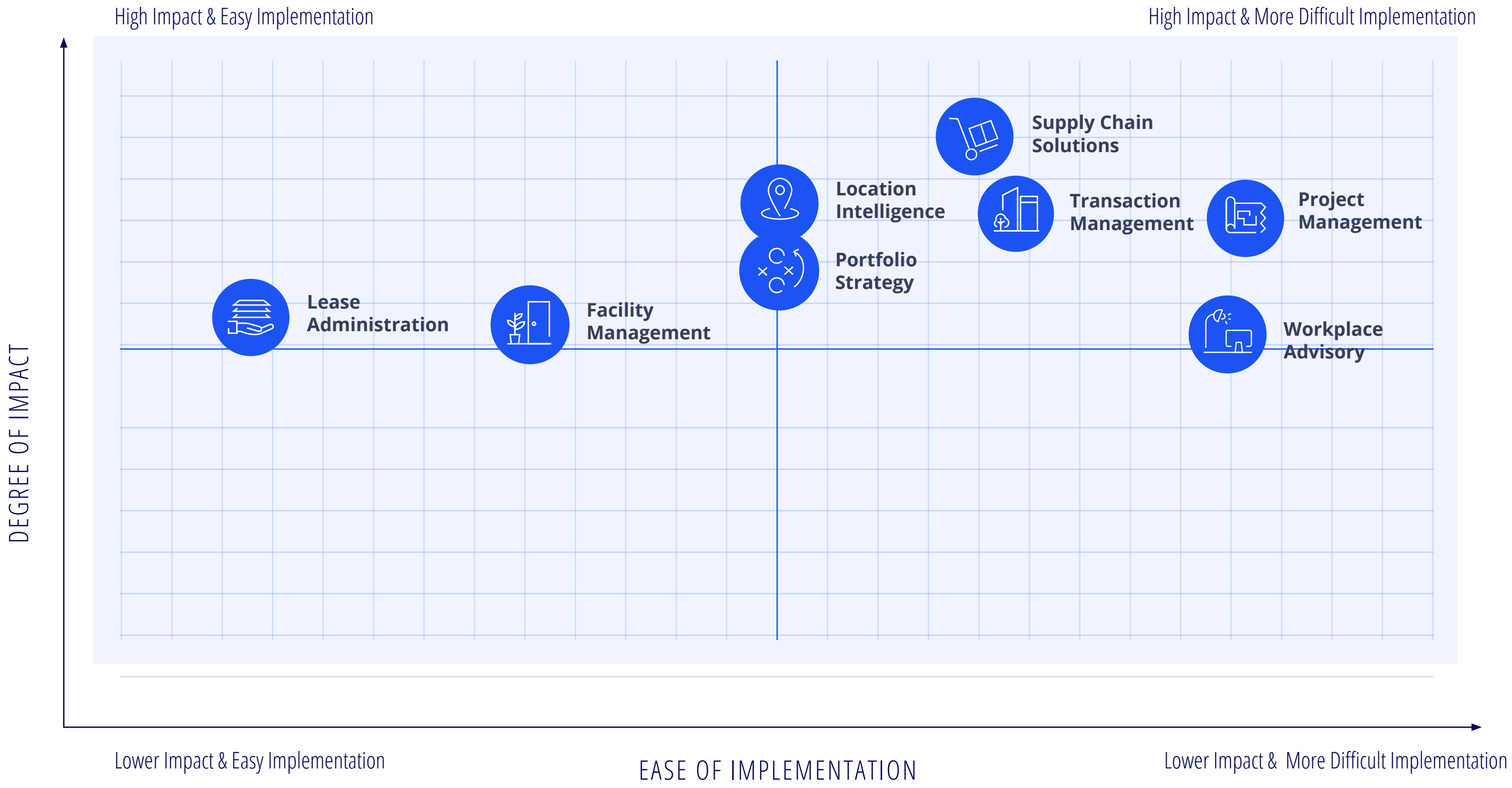
Implementation and Impact on each area

" I'm particularly excited by the potential of AI in Portfolio Strategy and Transaction Management. Using machine learning to mine large pools of portfolio data will allow real estate teams to develop portfolio strategies in a fraction of the time. And, when combined with predictive analytics, transaction management teams will be able to develop optimal transaction strategies by better timing the market based on forecasted market trends."

Mike Davis
Managing Director, Occupier Services
Asia Pacific

Areas of Impact | The now, the next and the possible

AI's influence on the commercial real estate sector will undoubtedly be felt, but its timing and extent of impact will differ depending on the specific domain. Some segments, like transaction management, present challenges to adoption due to their sensitive nature. In contrast, areas like lease administration and facility management are already witnessing the integration of AI, albeit with a potentially lesser overall impact on the industry.



Lease Administration

1 100

Maturity Level - Current AI use

Areas of Advancement:

Speed	Reduction in cycletime by 80% for end-to-end process.
Scale	Transformational approach to business process.
Process Improvement	Team emphasis shifts quality control with a reduction in repetitive processes.

COLLIERS EXAMPLE

OCR AI

Issue

An energy company experienced a cyber attack and all systems were disabled. Notifications to all landlords were require to be made as rent could not be processed. Colliers could not access systems and the client could not access email.

Insight

The client provided screenshots from the landlord report on their phone, and the Colliers Lease Administration team utilised AI OCR to extract details from over 40 images, achieving a 90% capture rate, and sent out emails within the designated time frame.

Solution

Colliers minimised any downtime and notified over 400 landlords about the delay in payment.

The now: Traditional approach

Lease Analysts support tenants by managing 3rd party databases containing critical dates and assisting in rent payments, facilitating the development of new leases and amendments, and conducting audits of lease documents.

The next: Opportunity

Natural Language Processing used through Optical Character Recognition (OCR) technology streamlines the lease abstraction process and improves data accuracy while Machine Learning enhances critical date management by automatically tracking and reminding lease administrators of important deadlines.

The possible: Anticipatory

Digital leases are automatically uploaded to a system that not only initiates and manages these leases but also recommends opportunities for portfolio improvements. This automated approach streamlines lease administration and enhances strategic asset management.

PERSPECTIVE

Arpit Mehrotra
Managing Director, Office Services
India

“Clients can achieve greater scalability and flexibility in managing their lease portfolios, adapting more effectively to the changing market conditions and business needs. Real-time access to lease data and insights can enable clients to optimize their lease portfolios, identify cost-saving opportunities, and make informed decisions about lease negotiations, renewals, and exits. Clients today can rely on AI to safeguard business interests and reputation by ensuring regulatory compliance and reducing legal disputes or penalties.”

Portfolio Strategy

1 — 100

Maturity Level - Current AI use

Areas of Advancement:

Speed	80% increase in speed of portfolio analysis.
Scale	Implementation of automated strategy recommendations across entire portfolios.
Process Improvement	Machine predicts portfolio improvements at a local, regional and global scale.

COLLIERS EXAMPLE

Machine Learning

Portfolio Strategy is currently using machine learning AI to run portfolio optimisation results by analyzing large amounts of data including office locations, sizes, expiration dates, headcounts, etc. to locate savings opportunities for clients. This is anticipated to result in an 80% increase in the speed of analysis.

The now: Traditional approach

Consultants analyse critical portfolio data and location information to develop scenarios that drive better alignment to the business and reduce costs and increase efficiency.

The next: Opportunity

Machine learning can provide analysis of key measures, align to core KPI's and provide recommendations on market, location and timing recommendations as well as recommend new developments and optimal mix of properties in a portfolio.

The possible: Anticipatory

AI enhances critical date management by proactively identifying key risks and opportunities at various locations, recommending projects to capitalize on occupancy and market conditions. It can also provide anticipatory recommendations on your device to improve the status of your portfolio, highlighting potential risks, planning opportunities, and trends. This approach ensures a strategic and informed management of your assets.

PERSPECTIVE

Mike Davis
Managing Director Occupier Services
Asia Pacific

"Leveraging AI, office occupiers can achieve their portfolio goals more efficiently and gain a competitive edge. AI not only enables optimised space utilisations but also powers location analysis based on a variety of factors including workforce demographics, access to amenities and transportation. AI powers cost savings, tenant experience and decision making through advanced analytics, while aligning with sustainability goals."

Workplace Advisory

1 100

Maturity Level - Current AI use

Areas of Advancement:

Speed	Gathering of space, occupancy data and design development accelerated.
Scale	Implement design features and workplace strategies across entire portfolios.
Process Improvement	A creator focus on design strategy with a machine focus on production and management.

COLLIERS EXAMPLE

Machine Learning

Issue

A high tech manufacturing company wanted to understand if facilities measures impacted their employee / people experience.

Insight

The company used machine learning to see if there were correlations between location data (LQI) and people data – (engagement, pulse survey).

Solution

They leveraged the location data (LQI) to improve bottom quartile of office and eliminate small office requirements.

The now: Traditional approach

Consultants address diverse workplace needs, collaborating with designers for customised workplace solutions aligned with client needs and preferences. They also conduct targeted surveys, collaboratively designing questions with employers to analyse data and address specific problems.

The next: Opportunity

Machine learning can collect and analyse data from surveys, feedback systems and social platforms to assess company culture and other desired areas of interest. Generative AI can be used to generate floor plans, create realistic 3D renderings, and conduct test fittings and machine learning used to personalise the work experience for employees.

The possible: Anticipatory

AI-based optimisation enhances decision-making in real-time network capacity balancing, vehicle routing, inventory slotting, and labor planning. Additionally, generative AI can develop a data request template that streamlines the execution of a network optimization study from start to finish. Predictive analytics are also utilised to monitor trends and recommend optimal locations for OEMs (Original Equipment Manufacturer).

PERSPECTIVE

Karen Primmer
Head of Workplace Innovation and Transformation, Occupier Services Australia

"In Australia, we have introduced our occupier clients to Basking, an AI workplace analytics platform that provides occupancy and space utilisation insights based on data gathered via Wi-Fi networks. It analyses occupancy data and helps our clients to better understand how their employees interact and occupy spaces, with real time and historical insights that highlight patterns and potential for space optimisation. Basking is one of a suite of Colliers AI tools that can assist occupiers to make informed decisions on portfolio optimisation enabling maximised space functionality, cost savings, reduced energy use and environmental impact."

Location Intelligence

COLLIERS EXAMPLE

Machine Learning

Issue

A company was an early adopter of Diversity, Equity and Inclusion (DEI) initiatives and was seen as a leader in the space, however, they had been struggling to hit their diversity initiatives across all functional areas with specific challenges in engineering and specifically for Hispanic and African American talent.

Insight

The company used data scraping and our Workforce Intelligence Platform to show the three markets they were most actively hiring in were all bottom quintile in terms of diversity for these segments.

Solution

Opened up a new office in the top DEI engineering market for target demographics that had high quality, low-cost, growing talent pool.

Maturity Level - Current AI use

Areas of Advancement:

Speed	Machine Analyses vast workforce and market conditions.
Scale	Automatically generating advanced location strategies for all locations.
Process Improvement	Constantly analysing real-time data and reducing manual analysis.

The now: Traditional approach

Consultants conduct studies to identify the ideal locations for a company's specific hiring needs, talent management plans and location strategies.

The next: Opportunity

Machine learning and predictive analytics are used to monitor market trends using AI-powered tools to identify high-demand jobs in specific markets and locate talent pools with skilled professionals.

The possible: Anticipatory

Predictive analytics and market trend forecasting are utilised to automatically recommend ideal locations, ensuring that deliverables are tailored and automated for markets of interest. This strategic approach streamlines the process of selecting optimal sites by aligning them closely with evolving market conditions.

PERSPECTIVES

Amit Oberoi
Head of Occupier Strategy
Office Services
Asia

"The use of Big Data and Machine Learning can be leveraged to analyse humungous data sets of demographics, economic, tax and incentives, talent pool, supply chain, consumer markets, real estate etc, and importantly predict future trends & risks. A recommendation based on such massive scales while being able to analysis at a granular level is a huge advantage for clients when selecting an optimal location for their offices or industrial set ups."

Tridiana Ong
Executive Director & Head
Occupier Services
Singapore

"AI is enhancing location intelligence in CRE, delivering precise and data-driven insights, driving unprecedented efficiency gains. With advanced predictive analytics and real-time market insights based on comprehensive workforce and market data, we are helping our occupier clients to swiftly identify and secure optimal sites that align with their unique needs and operational requirements. Generative models are enabling occupiers to precision-manage their portfolios, optimise workplace strategy, energy consumption, and maintenance schedules, while unlocking new levels of performance, efficiency, and sustainability."

Project Management

1 — 100

Maturity Level - Current AI use

Areas of Advancement:

Speed	Accelerated creation and gathering of local market intel, regulations and codes.
Scale	Integrated project designs and risk management across entire portfolios.
Process Improvement	Predictive insights into capitalizing on local market conditions for project schedules.

COLLIERS EXAMPLE

Generative AI

We are implementing AI to streamline the production of 3D visualisations and renderings. In the initial phases, they have already observed a decrease in output time of approximately 30-50%. The application of AI in this context offers significant value to Project Management by enhancing the efficiency of design work and reducing the overall project timeline.

The now: Traditional approach

Project managers play a crucial role in strategizing, coordinating, and overseeing resource management for a wide range of projects initiated in response to client requests.

The next: Opportunity

Machine learning and predictive analytics can recommend the optimal resource allocation, enabling project managers to make well-informed choices that reduce wastage, result in cost savings, and ultimately lead to the best project outcomes.

The possible: Anticipatory

Generative AI facilitates the creation of concept designs and specifications that include requirements, costs, and safety plans. It automatically provides a snapshot of local markets, detailing material and labor costs, building codes, and municipal regulations. Additionally, predictive analytics and scan assessments are employed to identify potential risks, ensuring a comprehensive and informed approach to project planning and execution.

PERSPECTIVES

Joon Baik
Head of Enterprise Project Management
Occupier Services
Asia

"With AI, Project Managers have access to valuable insights into market trends and regulatory changes that help swift decision-making on projects and program strategies. Identifying potential risks early in the project lifecycle by analyzing data from past projects and current market conditions is now made possible, enabling Project Managers to mitigate risks, minimize delays and cost overruns. With a better understanding of construction data in real-time to identify defects, health and safety, and quality issues, AI enables projects to achieve highest standards, reducing rectification work costs, and improving client satisfaction."

Jay Cho
Executive Director
Office & Industrial Services
Korea

"Strategically leveraging AI in the traditional CRE landscape can help create ripe opportunities for owners, investors and asset managers, with advantages ranging from algorithm-based recommendations, automated property valuation, to market trend insights and optimal space reconfigurations at elevated efficiency and speed powered by AI."

Transaction Management

1 — 100

Maturity Level - Current AI use

Areas of Advancement:

Speed	Reduced cycle time for analysing locations and lease execution.
Scale	Total end-to-end process managed through integrated AI solution.
Process Improvement	Automated analytics and workflow with advisor focused on negotiation and quality control.

COLLIERS EXAMPLE

Generative AI

Currently, as transactions are completed, Colliers will generate a Transaction Quality scorecard which captures various performance metrics related to the transaction executed. The Colliers360 team seeks to enhance Transaction Quality scorecards by leveraging generative AI to automatically create them for transactions. Additionally, machine learning will be employed to analyse the metrics and propose improvements for an enhanced overall score.

The now: Traditional approach

Transaction managers help organise real estate transactions that brokers, experts in their field, are executing for their clients.

The next: Opportunity

Machine learning and generative AI provide automated workflows in an integrated manner, help create marketing content and strategies, produce survey data and market analysis to provide valuable insights on rent prices, vacancies, and other market trends.

The possible: Anticipatory

Management of end-to-end process that includes enhanced presentations supported by real-time availability and comparative analysis. In this process, market data is matched to internal data to automatically suggest transactions. Additionally, assistance with contract management is provided by identifying relevant clauses and efficiently handling large volumes of contracts, streamlining administrative processes and improving decision-making.

PERSPECTIVES

Fiona Ngan
Head, Occupier Services
Hong Kong

"We see opportunities in how AI will continue to enhance precision and efficiency throughout the value chain, from portfolio optimisation to workplace advisory, project management and transaction management. The application of the AI on data analytics and management will empower the teams to focus on maximising value for clients' lease portfolios and provide advisory over decision-marking in real estate strategies."

Dom Fredrick Andaya
Executive Director
Office Services
Philippines

"The Commercial Real Estate industry thrives on swift and accurate decision-making to accommodate the fast-paced and emerging Asia-Pacific markets. AI can assist negotiators in processing huge volumes of real estate data, analysing market trends and opportunities, generating forecasts through existing economic indicators, and anticipating future real estate market challenges. Incorporating AI in the workplace can improve operational efficiency as negotiators take control of it as a tool to meet their client demand across the region."

Facility Management

1 100

Maturity Level - Current AI use

Areas of Advancement:

Speed	Ability to Analyse facility conditions and immediately create solutions.
Scale	Integrated IoT portfolio that is connected with global data to anticipate bigger trends.
Process Improvement	Machine Analyses and initiates preventative maintenance requests and creates automated change orders.

INDUSTRY EXAMPLE

Machine Learning

The Facility Management sector is presently integrating AI to optimise energy usage and preventive systems replacement.

Numerous owners are harnessing sensor data, employing AI systems to understand usage patterns, and predicting instances of energy wastage.

Given the prominence of the green revolution, carbon neutrality, and the ongoing emphasis on energy, it will be imperative for our FM Advisory team to draw insights from these evolving AI applications to provide advice and guidance to clients.

The now: Traditional approach

Facility Managers collaborate with building engineers, vendors, and staff to help drive cost savings, reduce energy expenses, meet budget targets, and enhance the overall employee experience.

The next: Opportunity

Predictive analytics can be used to help implement proactive maintenance for energy cost reduction, enhance cost prediction, asset lifespan assessment, depreciation quantification, and insights into future maintenance and improvements.

Machine learning will help act as a concierge, serving as the first line of communication for tenants. Predictive analytics will be able to assess future occupancy requirements and help determine commensurate onsite service levels.

The possible: Anticipatory

The integration of emerging AI technologies with IoT and Building Operating Technology drives savings and enhances preventative maintenance, optimizing building operations and infrastructure longevity. The health of a building is monitored and assessed through digital twins or smart building concepts, using advanced digital models.

PERSPECTIVE

Gerard Earl
National Director
Occupier Services
New Zealand

"Colliers Occupier Services and Colliers REMS in Australasia have introduced Colliers Clarity FM, which is one system for all Colliers suppliers to access information about jobs assigned to an organisation and to interact with our ServiceHub team. Clarity FM provides greater functionality for our clients and better connectivity with our suppliers. It can mimic the decision-making abilities of humans to drive efficiency. A further ability through the auto-assignment of reactive maintenance is to ensure the correct assignment of jobs to landlord or tenant supplier in line with the lease, therefore minimising the potential for occupiers erroneously paying for landlord's liabilities."

Supply Chain Solutions

1 100

Maturity Level - Current AI use

Areas of Advancement:

Speed	Constant, real-time network optimisation analysis.
Scale	Global transformation of all supply chain planning, logistics and footprint management.
Process Improvement	Leadership focused on gamification and scenario planning while machine optimises flow of goods.

INDUSTRY EXAMPLE

Machine Learning

The Supply Chain Industry is using machine learning to balance network demand with capacity. During recent labor negotiations, shippers began to shift their volume to other carriers.

Through their planning tools, a company was able to divert package volume from manual hubs to automated hubs. This helped the company reduce labor hours by 10% which was in line with the 9.9% decline in their average daily package volume.

Our Supply Chain Solutions team can utilise this example to enhance advisory services tailored to meet future client requirements.

The now: Traditional approach

Consultants utilise human-generated spreadsheets as the main tool for demand forecasting and inventory targeting. They utilise historical and endogenous data inputs for analysis, making necessary adjustments to forecasts and planning targets.

The next: Opportunity

Generative AI and predictive analytics build forecasting and inventory optimisation programs which can take 'live', endogenous operational data (e.g. sales within the last hour) and exogenous data (e.g. Social media feedback on a daily promotion, weather forecasts and news feeds) and make real time adjustments to the demand forecast or inventory requirements.

The possible: Anticipatory

AI-based optimisation enhances decision-making in network capacity balancing, vehicle routing, inventory slotting, and labor planning. Additionally, generative AI can develop a data request template that streamlines the execution of a network optimisation study from start to finish. Predictive analytics are also utilised to monitor trends and recommend optimal locations for OEMs.

PERSPECTIVE

David Wang
Senior Director
Co-Head Industrial Services
East China

"The integration of AI with supply chain management has significantly improved the accuracy of demand forecasting, helping enterprises formulate better production and inventory plans. It powers intelligent operations, such as automated sorting and route planning, while enhancing logistics efficiency. It has facilitated collaboration and information sharing among supply chain parties, enabling enterprises to optimize their locations, improve efficiency, and reduce risks. In the future, AI will provide more precise analysis and planning for supply chain management, building a more agile, efficient, and sustainable global supply network, enabling enterprises to maintain a competitive advantage."

Additional Considerations

Emerging job roles in commercial real estate

AI will introduce employment opportunities that currently do not exist. Within the realm of CRE, emerging jobs may include Ethicists/ Ethics experts, Security Engineers, AI-Enabled Property Managers, AI Trainer/Model Curators, and more.

Impact of AI on employment

The extent of AI's impact on job loss and creation varies across industries, and its overall effect remains uncertain. If harnessed correctly and used to augment the industry's roles, AI becomes a vital tool to empower workers.

Benefits of AI implementation

AI's implementation can lead to minimised errors, increased profitability, streamlined processes, and innovative problem-solving.

Ethical concerns and challenges

AI raises ethical concerns and potential challenges. Confidential terms and clauses within leases pose a barrier and leveraging AI to track aspects of the employee experience, such as time in the office may raise privacy implications. To navigate these challenges, companies must find ways to effectively utilise AI while maintaining ethical standards.

PERSPECTIVES

Man Chan
Senior Executive Director
Occupier Services
Taiwan

"The recent era has witnessed a significant leap in real estate technology including AI, smart buildings with IoT (Internet of Things) applications, virtual tours and 3D models, automated property management and digital marketing. The adoption of digital tools and smart technologies continues to shape the industry's future, making processes more efficient, transparent, and accessible."

Bagus Adikusumo
Senior Director
Office Services
Indonesia

"AI significantly accelerates real estate transaction processes, enhances marketing campaigns through advanced digitalization, provides first impressions of properties using technologies like VR, assists in lead identification, and streamlines document exchanges. To stay competitive, we must wholeheartedly embrace AI."

Colliers

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