

WORK_IT: TECHNOLOGY | WORKPLACE | JOBS

CBRE

TOP100Summit

全球软件案例研究峰会

时间：11月15~17日

地点：北京国际会议中心

100个年度最值得学习案例

MPD工作坊（深圳站）

时间：9月21~22日

地点：深圳博林圣海伦酒店

20个3小时大时段沙盘课程

Make Professional
mpd

100

Make Professional
mpdMake Professional
mpd**MPD工作坊（北京站）**

时间：7月06~07日

地点：北京国家会议中心

20个3小时大时段沙盘课程

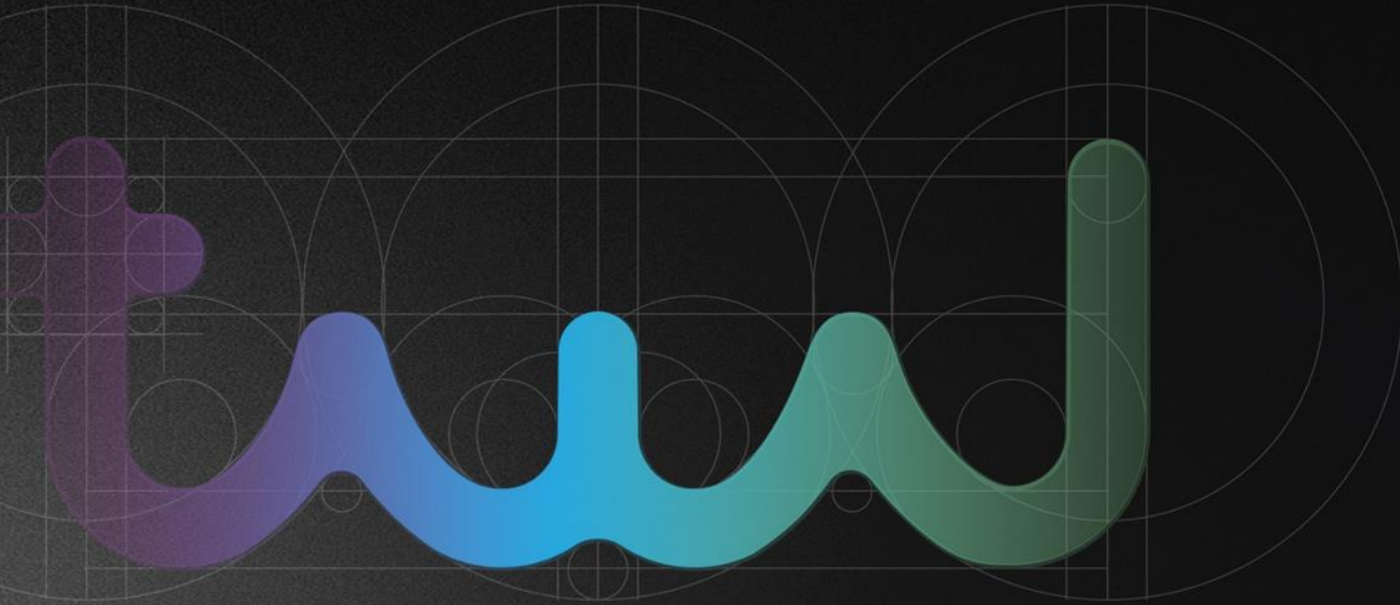
MPD工作坊（上海站）

时间：10月26~27日

地点：上海

20个3小时大时段沙盘课程

WORK_IT: TECHNOLOGY | WORKPLACE | JOBS

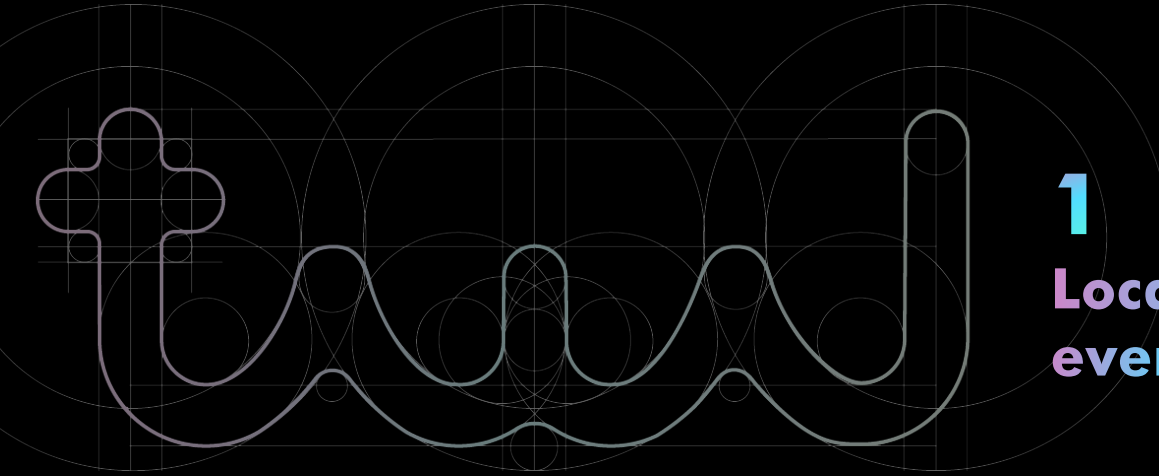


HOW TECHNOLOGY WILL REDEFINE REAL ESTATE
AND WHY COMPANIES MUST PREPARE NOW

CBRE

APAC IN THE DIGITAL AGE

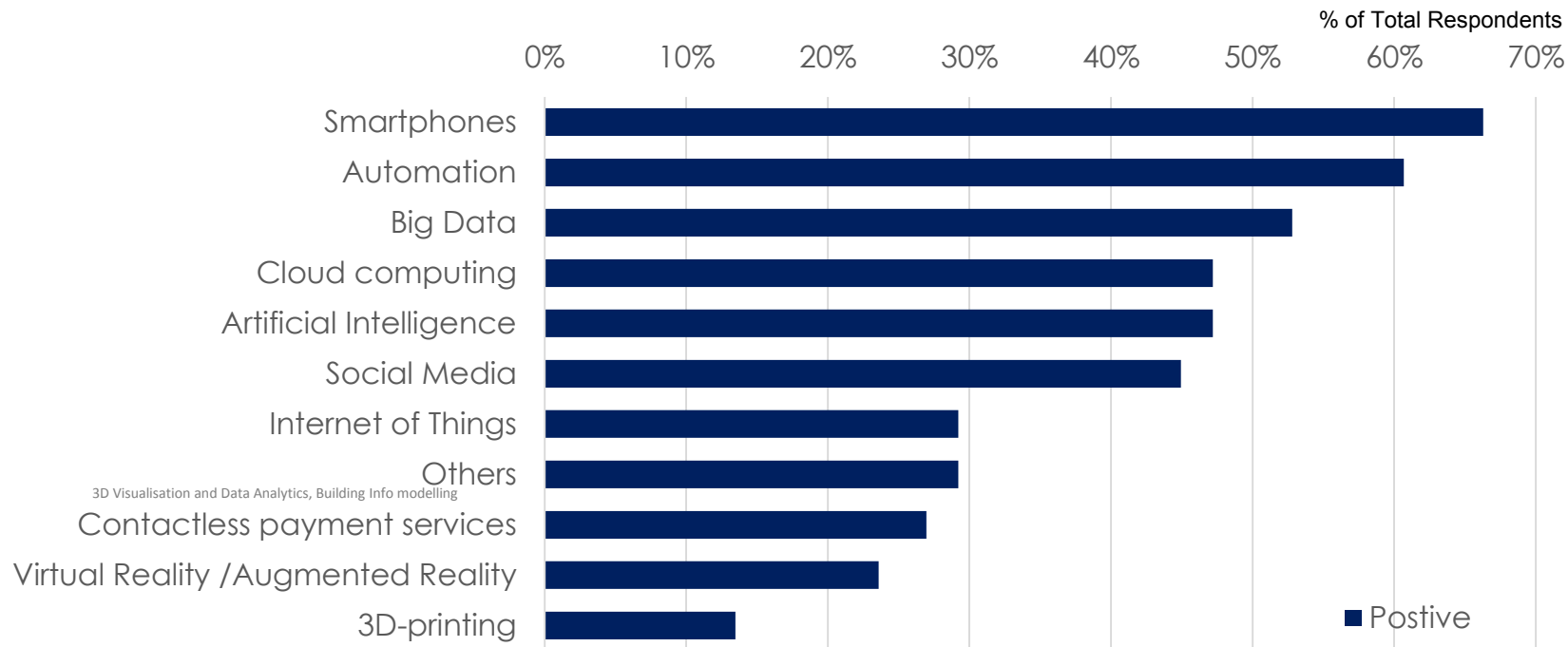




1

**Location is no longer
everything**

MAJOR TECHNOLOGIES IMPACTING BUSINESS



Source: CBRE Tech Survey

TECHNOLOGY IS ACCESSIBLE AND AFFORDABLE

Alexa

US\$129

IoT, AI



Oculus

US\$449

VR



Drone

US\$499

IoT



LOCATION IS NO LONGER EVERYTHING

Yesterday

Real Estate



Technology



Individual



LOCATION IS NO LONGER EVERYTHING

Today

Technology



Individual



Real Estate





CHANGING THE WAY WE WORK

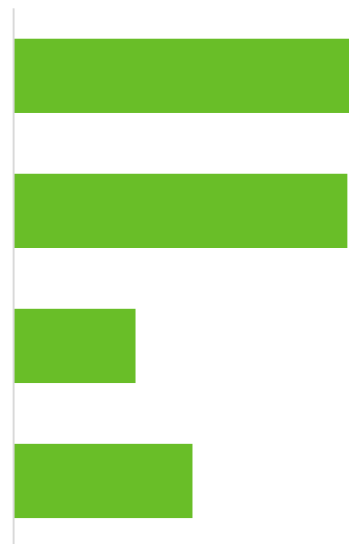
Expect headcount to decrease

60% 40% 20% 0%



Expect headcount to increase

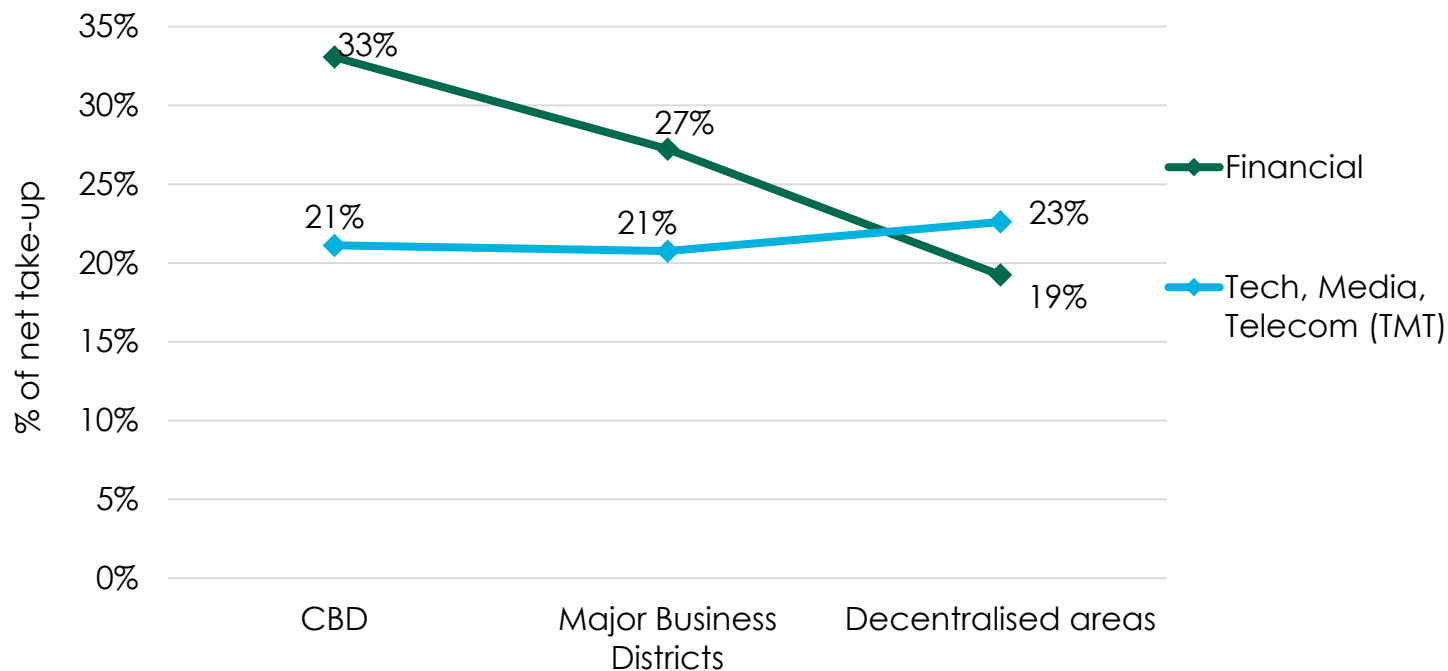
0% 20% 40% 60%



Source: CBRE Research



DIFFERENT LOCATIONAL PREFERENCE



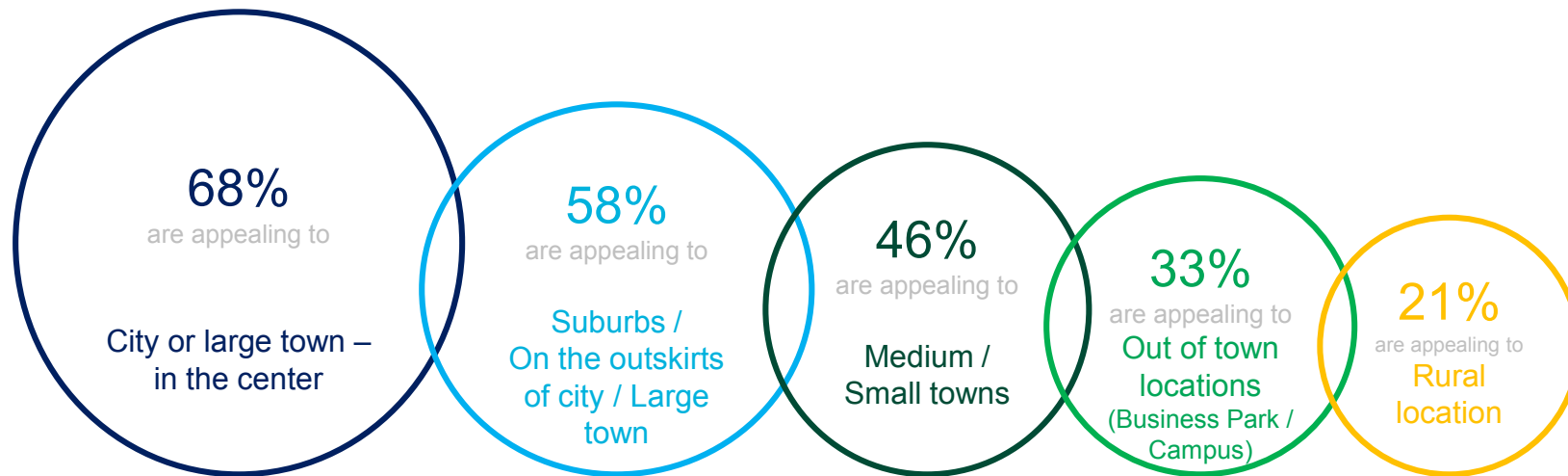
Source: CBRE Leasing Database

Note: Include Asia Pacific gateway cities only



MILLENNIALS' PREFERRED WORKING LOCATION

Q. How would you rate the appeal of the following locations as places to work?



Source: CBRE Millennial Survey 2016

DIFFERENT WORKPLACE REQUIREMENTS



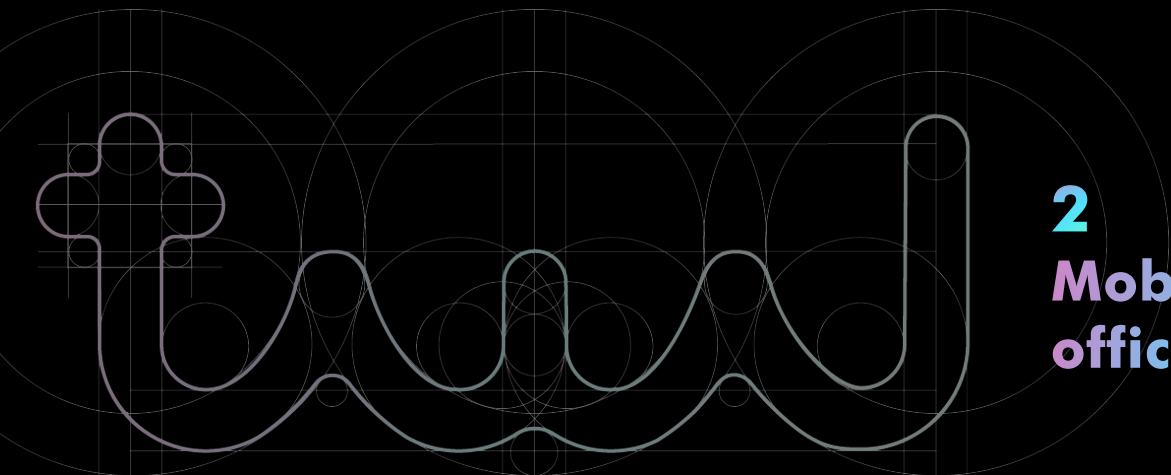
Tencent 腾讯

TECH

LEARNING

WELLNESS

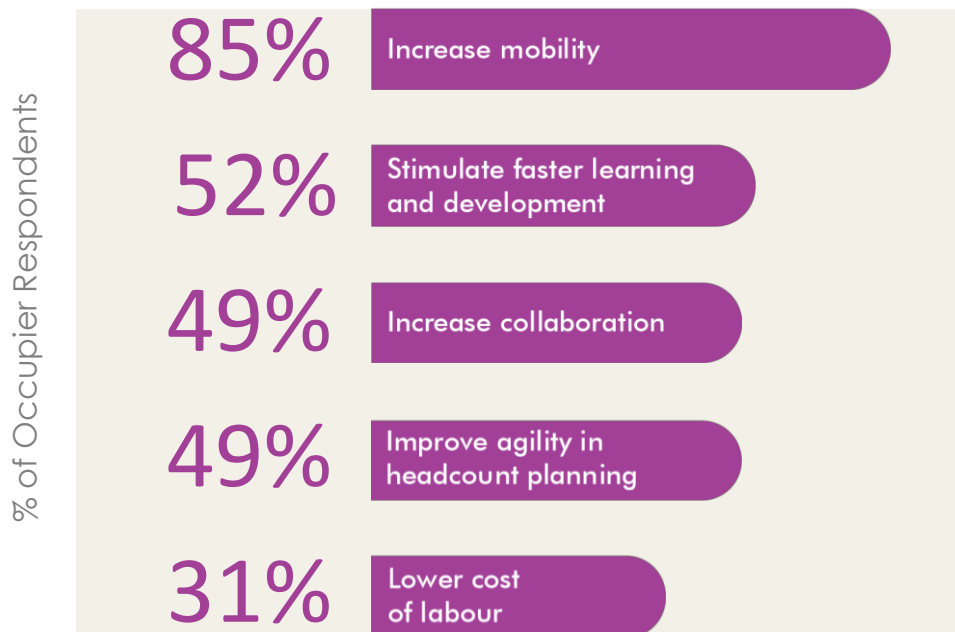
Houhai, Shenzhen
Opened 2017



2

**Mobility is rewriting
office demand**

FUTURE WORKFORCE WILL ...



Source: CBRE Research



ACTIVITY BASED WORKING BECOMES THE NEW NORM



Fixed Desk

55%

NOW

16%

NEXT 3 YEARS



Activity Based Working

26%

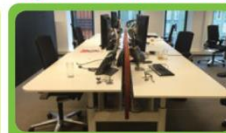
53%

Focus space



Focused touchdown area

Ergonomic work setting



Ergonomic work setting in quiet zone

Collaborative space



Large-size collaborative space

Social space



Multi-functional work cafe



High-walled pod



Ergonomic work setting in collaborative zone



Small-size collaborative space



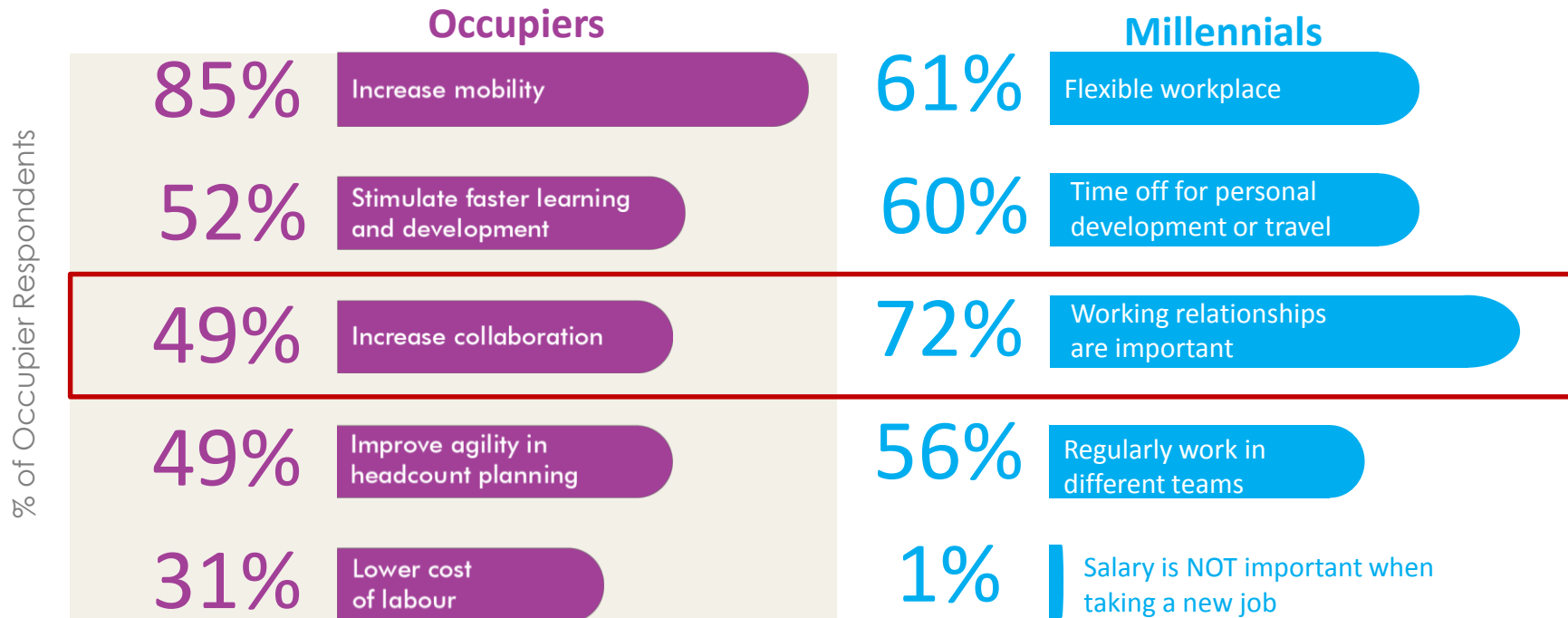
Multi-functional work cafe

Source: 2017 APAC Occupier Survey, CBRE Research

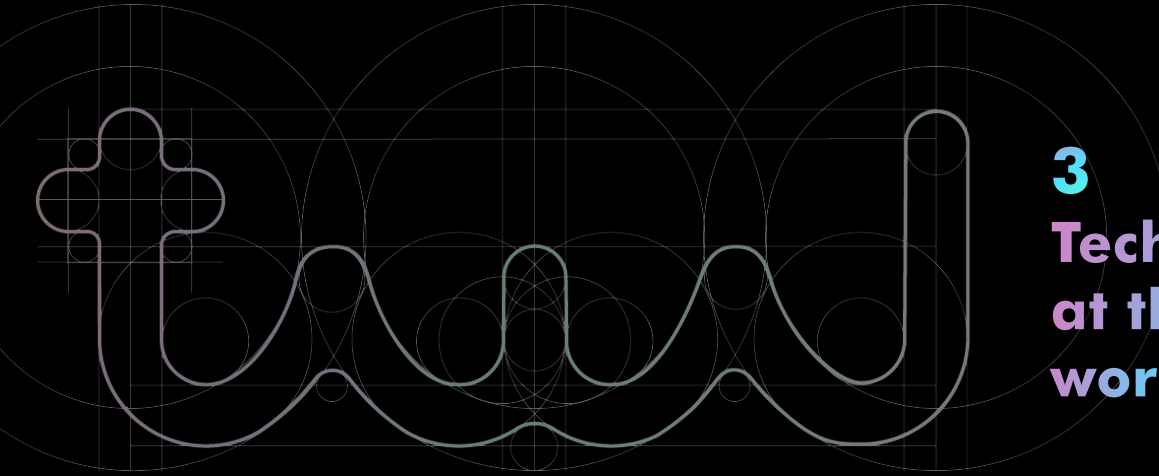
15



FUTURE WORKFORCE WILL ...



Source: CBRE Research



3
**Technology is placing people
at the centre of the
workplace**



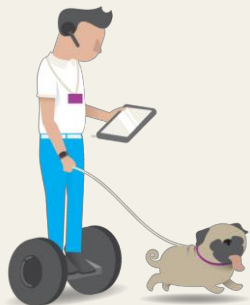
START WITH UNDERSTANDING HOW PEOPLE INTERACT WITH SPACE

Work becoming
more mobile

Better understanding
of space usage

Deeper analytics on
CRE strategy

Workplace that
enhance individual
experience



86% want to enable
mobile working



63% use sensors
47% use apps
42% use wearables



54% embrace big data
analysis in asset &
portfolio planning



53% want a more
customised workplace
environment

Source: CBRE Research

MORE ACCURATE ESTIMATION OF DEMAND

Occupiers

50%

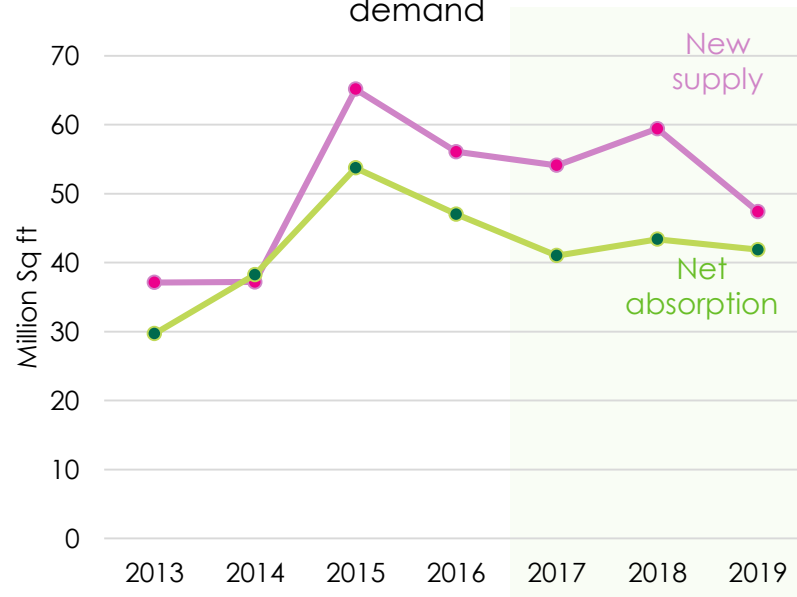
expect decline in
office demand

Landlords

32%

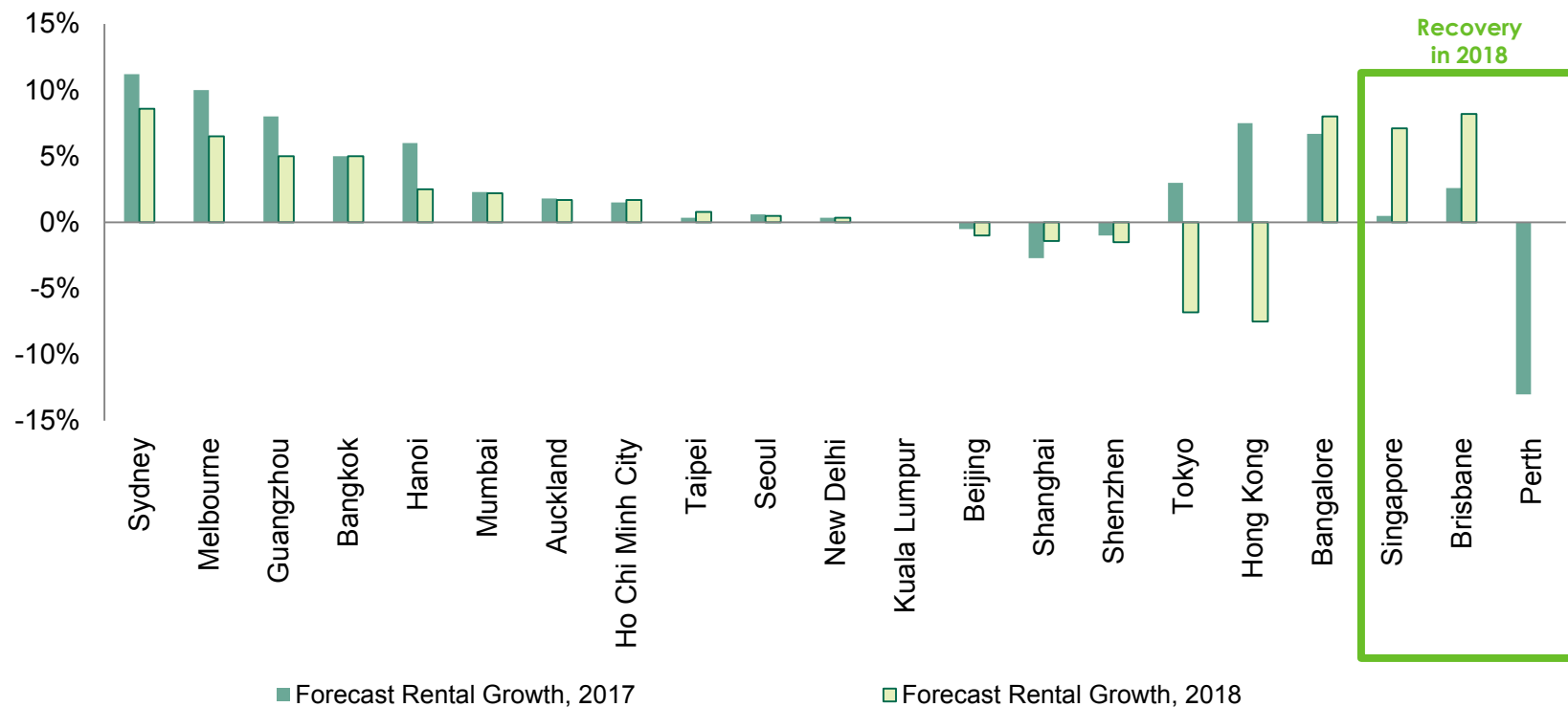
expect decline in
office demand

Asia Pacific new supply outstripping
demand



Source: CBRE Research

LOW OFFICE RENTAL GROWTH FOR LONGER



Source: CBRE Research, August 2017.

Note: The rental growth is based on effective Grade A rent in the CBD/ core location of each market



MORE USE OF CO-WORKING SPACE

Occupiers

52%

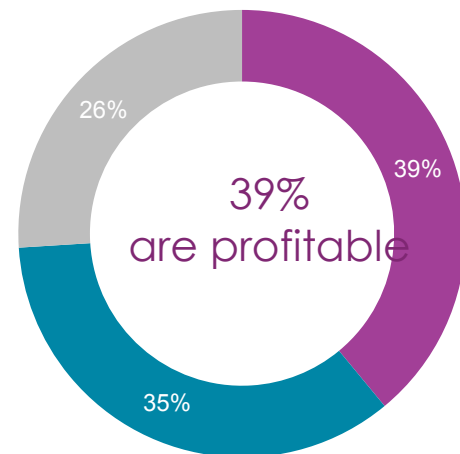
expect increased use
of third-party space

Landlords

68%

expect increased use
of third-party space

Profitability of co-working centres globally



■ Profitable ■ Break-even ■ Non-profitable

Source: CBRE Research

Source: Deskmag's Global Co-working Survey 2017

CASE FOR INVESTMENT

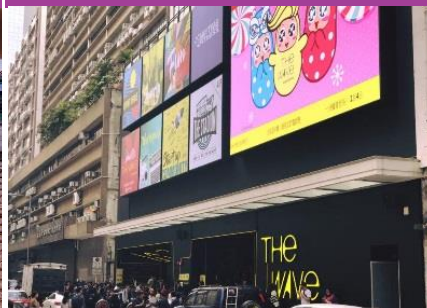
Equity stake



Asset conversion



Revitalization



Part of the tenant mix



基滙資本



GAW CAPITAL



\$33M



培新集團
PETERSON GROUP

LKF Hotel, Hong Kong → **wework**

Cheung Kong
Electronic
Building

The Wave

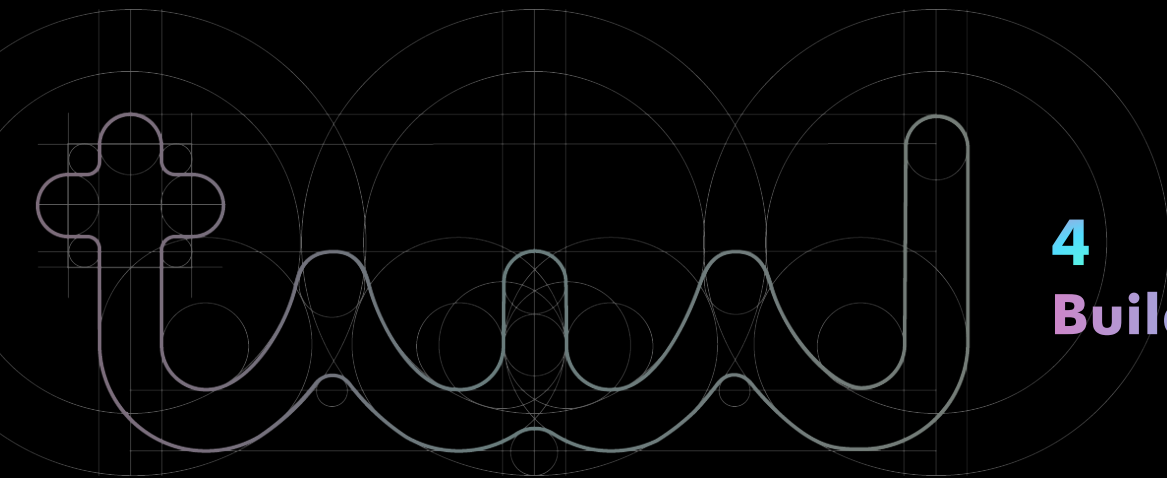
2009 → 2017
US\$23 mn → US\$170 mn



SWIRE PROPERTIES

30,000 sq ft
Taikoo Place





4

Buildings are coming to life



EXPECT THE RISE OF SMART BUILDINGS

Occupiers



56%
expect the rise of
smart buildings

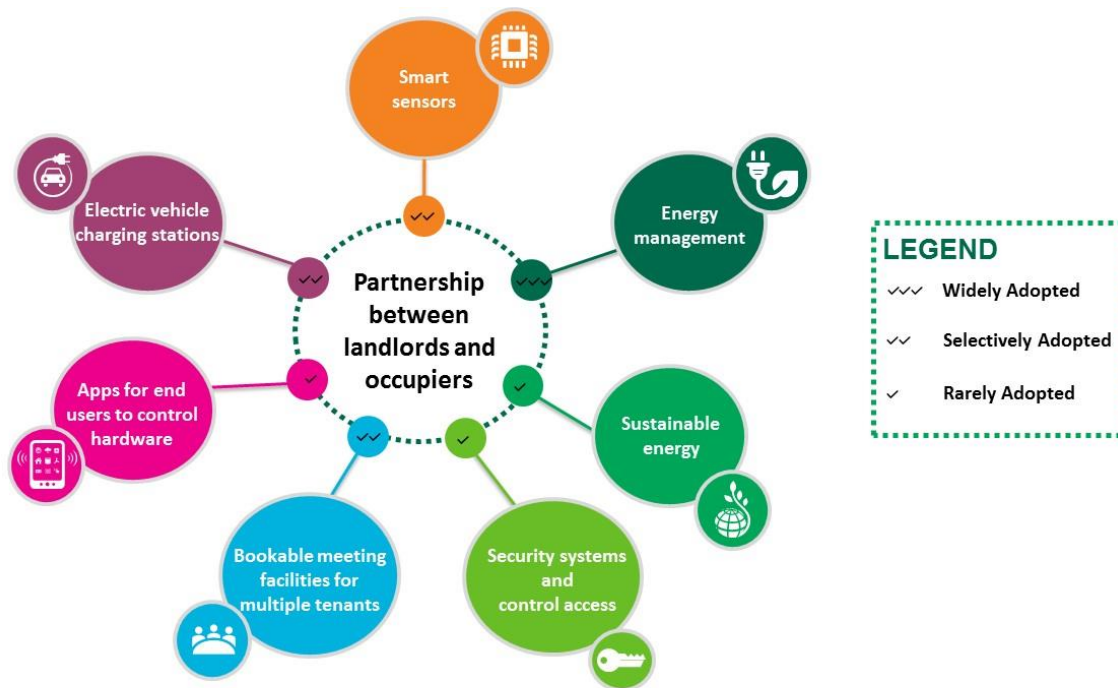
Landlords



84%
expect the rise of
smart buildings

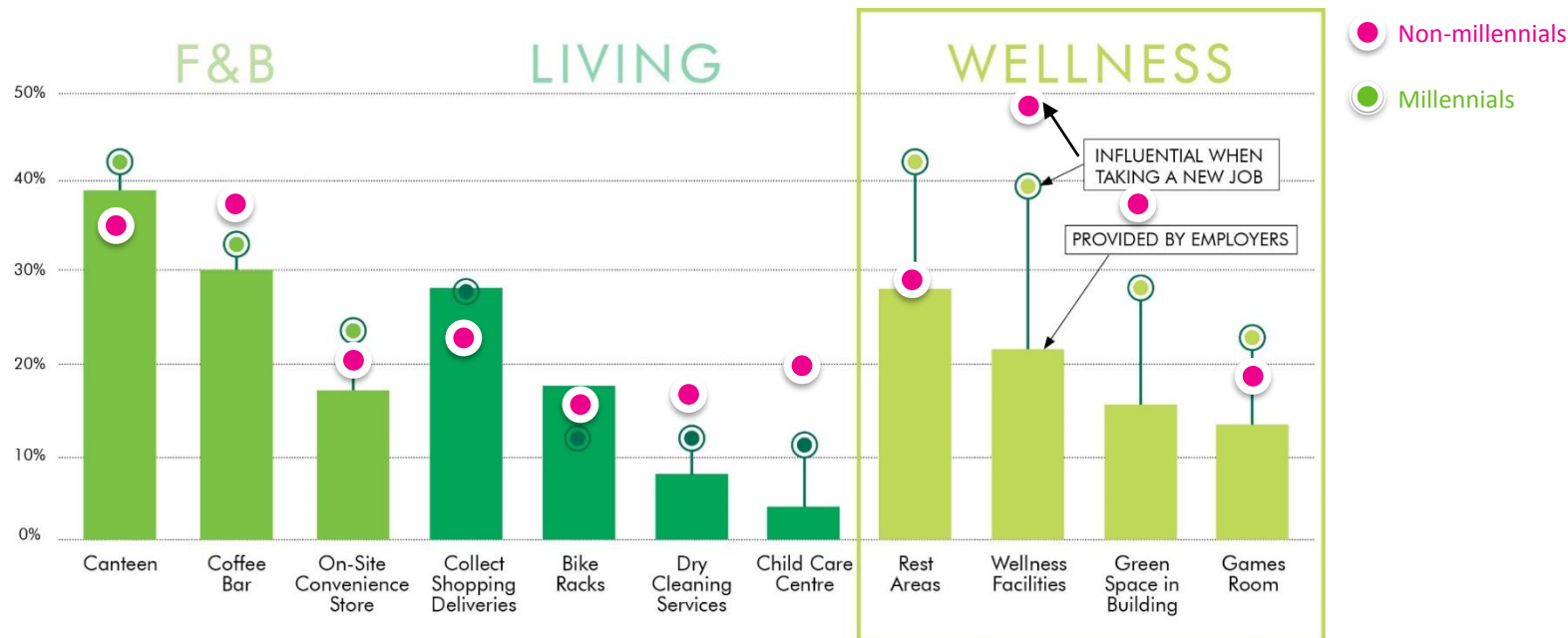
Source: CBRE Research

SMART BUILDING IS A TECHNOLOGICAL ECOSYSTEM

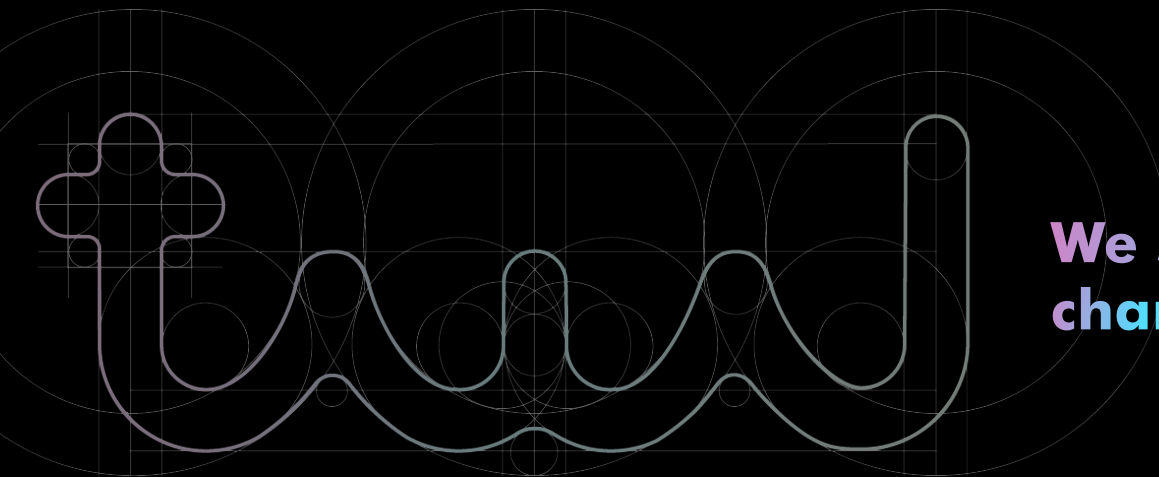


Source: CBRE Tech Survey

...AND A COMMUNITY

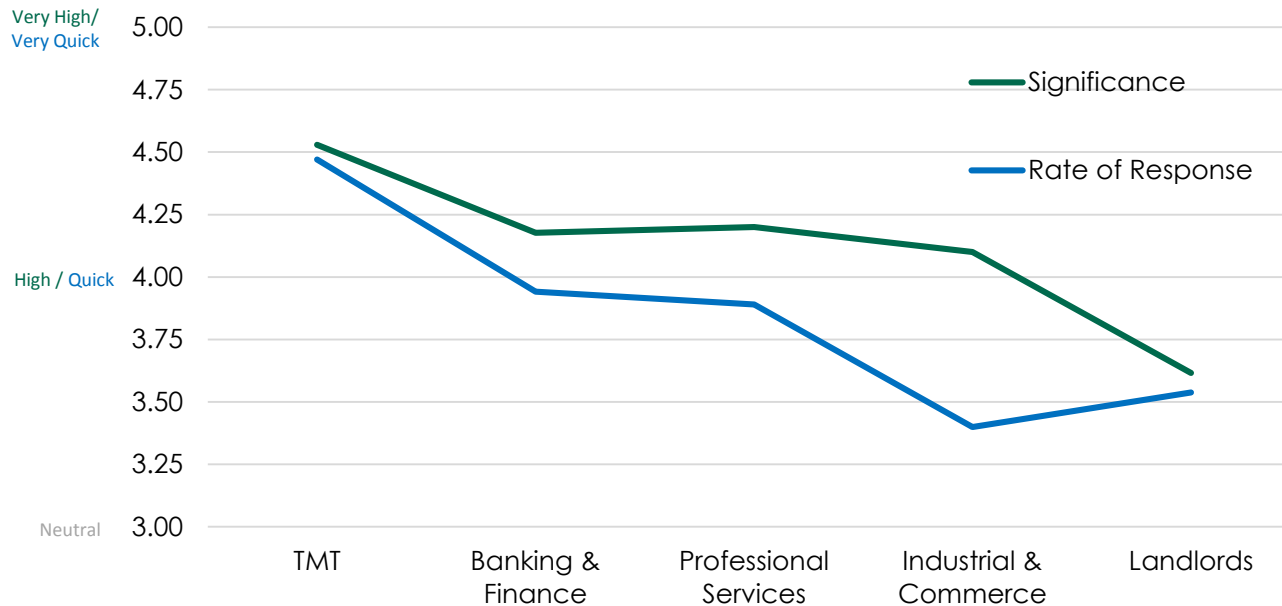


Source: CBRE Research, March 2017; Asia Pacific Millennials: Shaping the Future of Real Estate



**We should enable the
change**

SLOWER RESPONSE TO TECHNOLOGY CHANGES



Source: CBRE Tech Survey

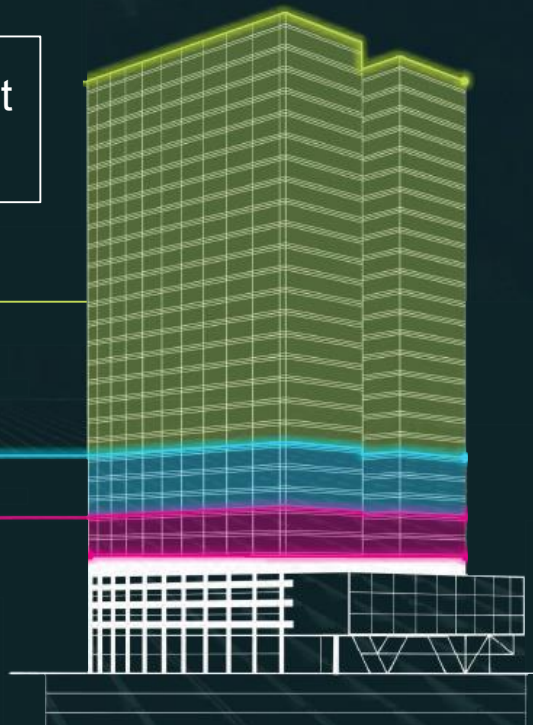
LANDLORD STRATEGIES: SMARTER BUILDINGS

Restructuring tenant portfolios

Traditional Tenants

Co-working space

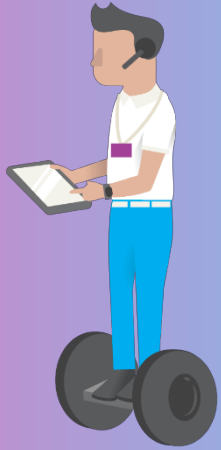
Amenities



Incorporating tech components

Source: CBRE Research

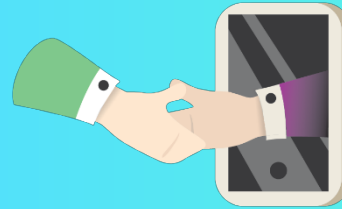
TECHNOLOGY | WORKPLACE | JOBS : KEY MESSAGES



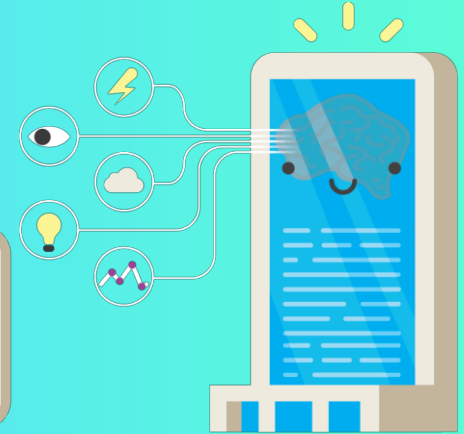
Location is no longer everything



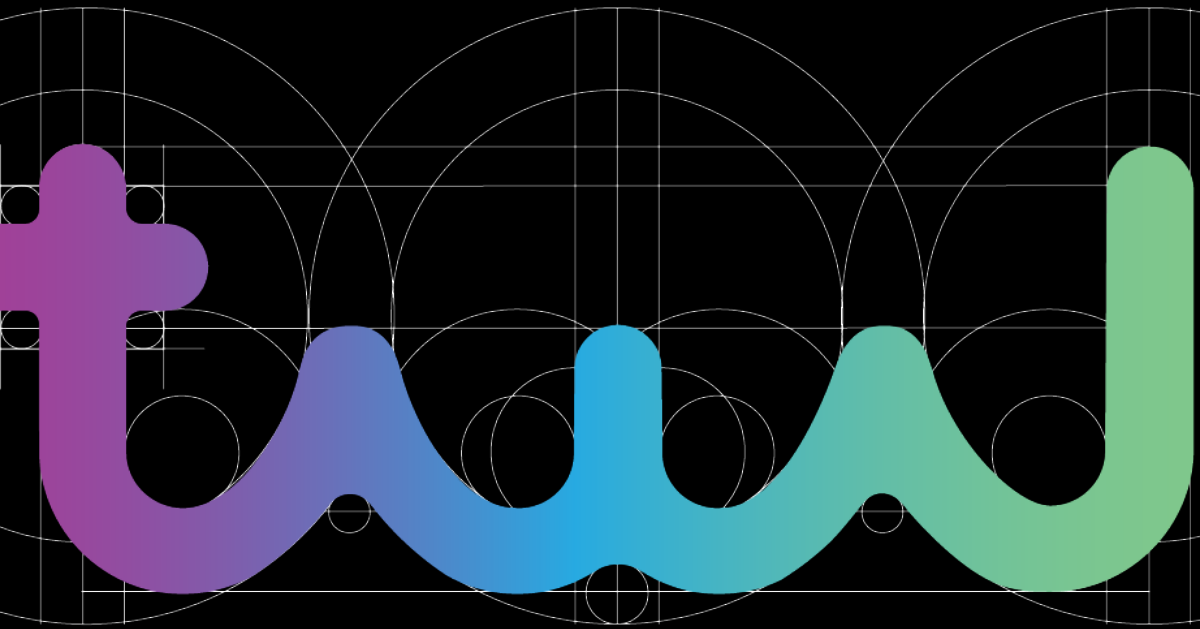
Mobility is rewriting office demand



Technology is placing people at the centre of the workplace



Buildings are coming to life



**THANK
YOU**

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