

# Corporate Real Estate

## Emerging Trends and Outlook for 2015

The image features a man in a dark jacket standing with his back to the camera in a field, looking at a series of white icons and text elements representing business concepts. The elements include:

- global solutions**: A world map icon with several plus signs above it.
- note to self**: A plus sign icon.
- tax**: A plus sign icon.
- business plan**: A plus sign icon.
- insurance**: A large plus sign icon.
- new strategies**: A bar chart with four bars labeled 04, 05, 06, and 07, and a tree diagram below it.
- airplane**: An icon of a jet airplane.
- directional sign**: A signpost with three arrows pointing left, up, and right.
- business meeting**: An icon showing three people in business attire, one with a briefcase.
- lightbulb**: A glowing lightbulb icon above the man's head.



Shifting Drivers of Demand | New CRE Mandates | Evolving Service Provider Needs



# THE PERFECT STORM

# Our panelist perspectives...



**Mary Beth Kuzmanovich,**  
Carolinas HealthCare  
System



**Brendan Sheehan,**  
Waste Management



**Martha O'Mara**  
Corporate Portfolio  
Analytics



**Craig Robinson**  
Colliers International

Office | Industrial | Growth Sectors  
End User | Advisors

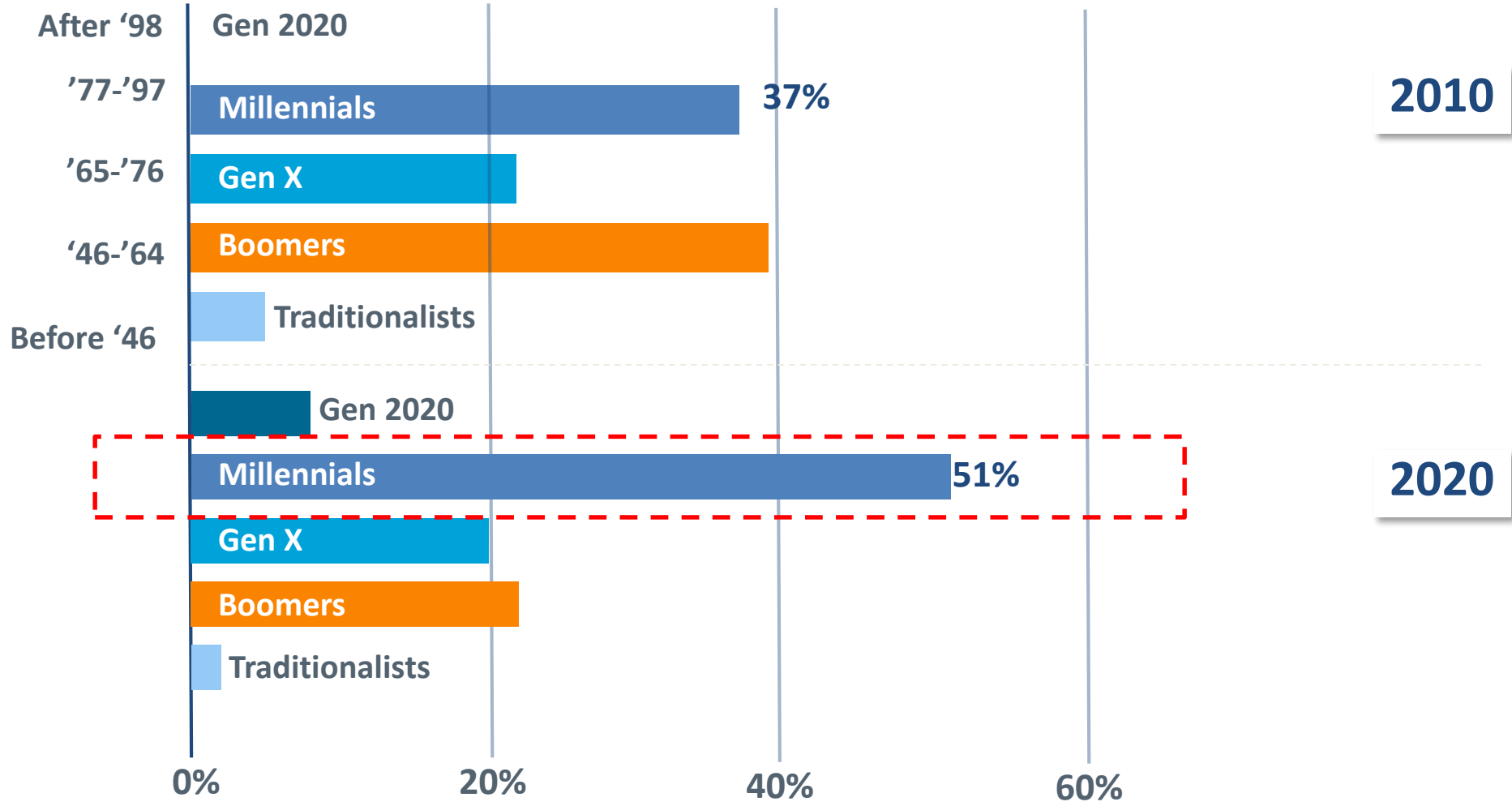


The war for talent wages on...



# Millennials vs. Multigenerational

## What are we really solving for?



Source: Bureau of Labor Statistics Employment Projections

# Is it really working?

New space standards, furniture and configurations

**Natural Light**



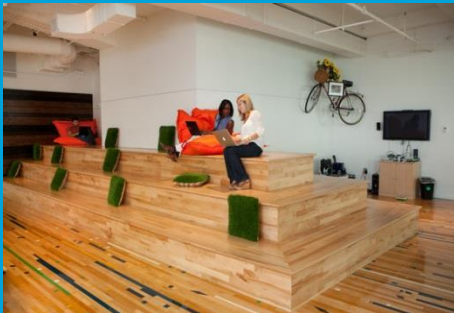
**Open Designs**



**Glass Partition Walls**



**Collaborative Space**



**Creative Designs**



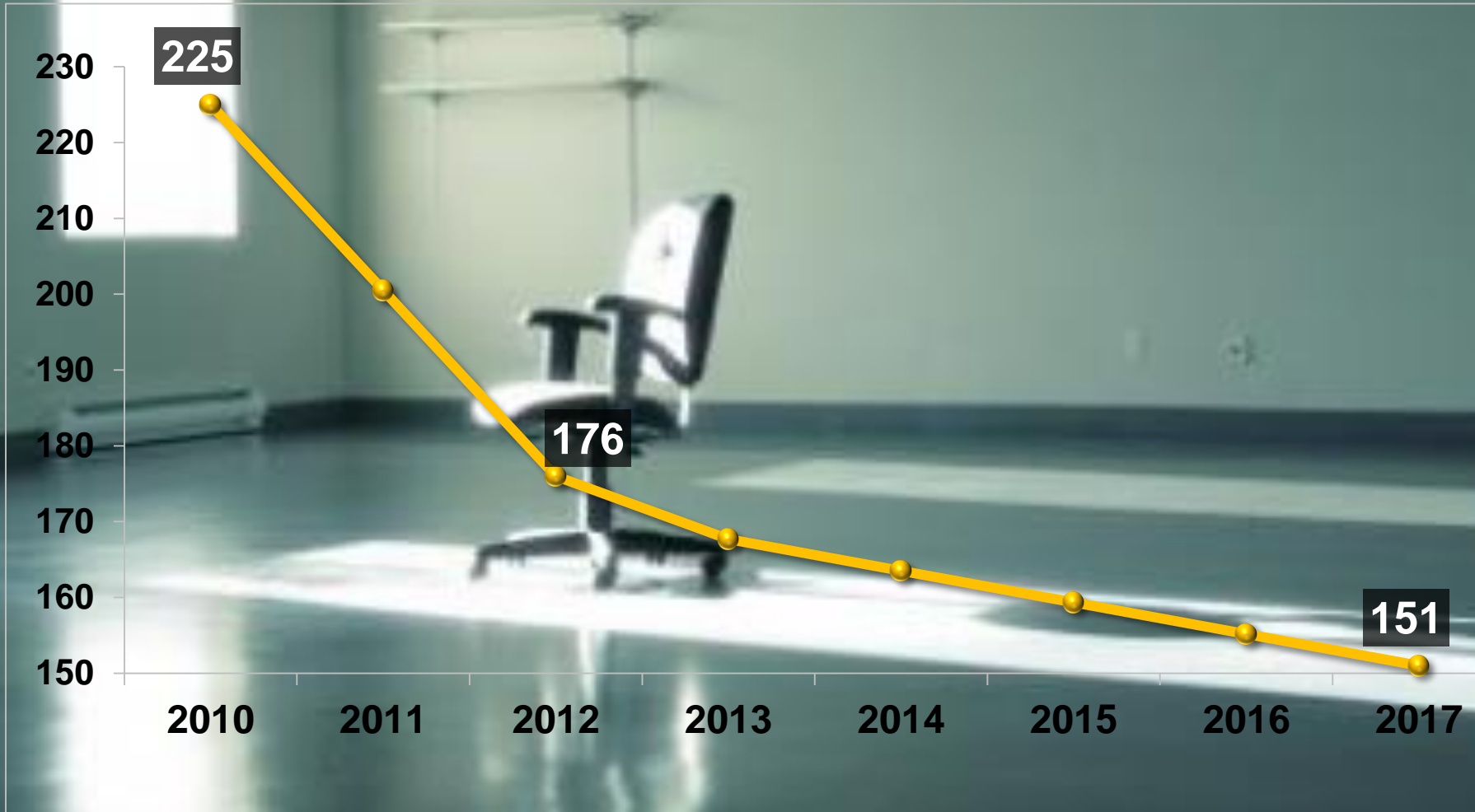
**Benching**





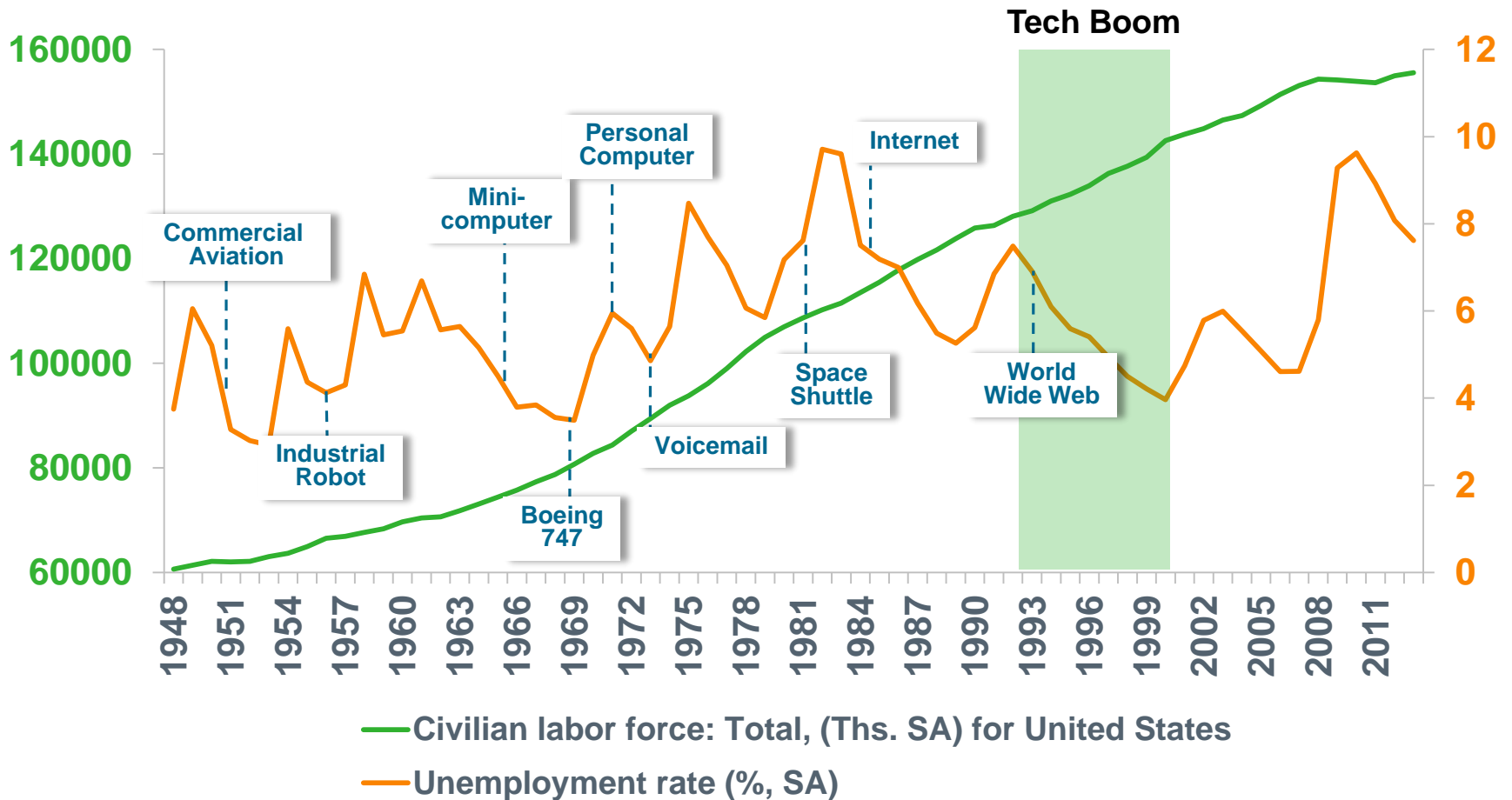
# Will this trend continue?

Projected space utilization for employees



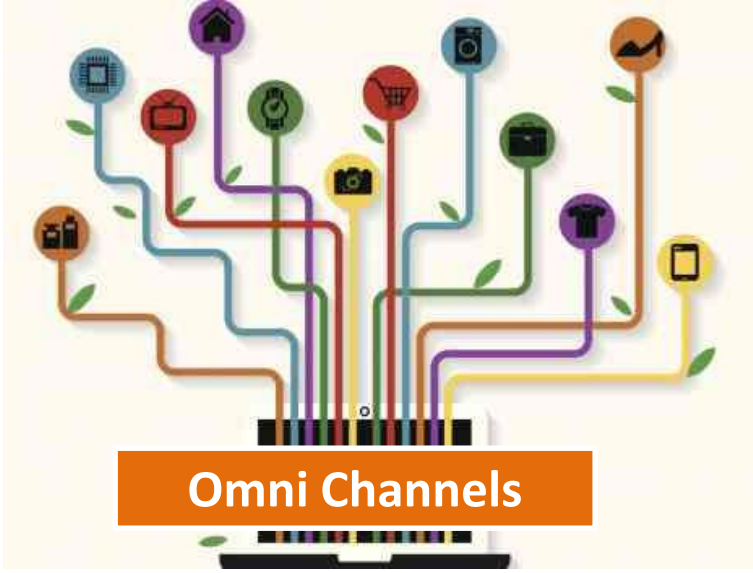
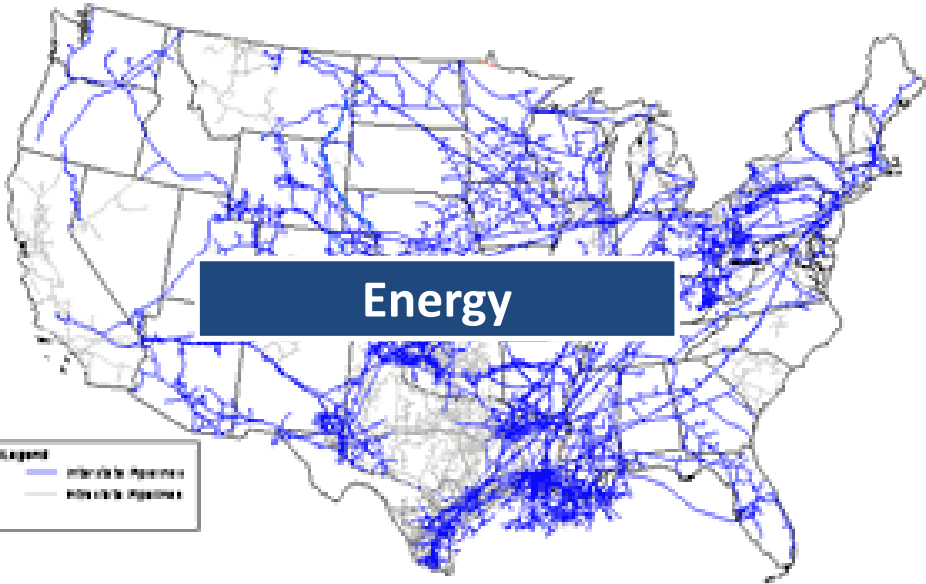
# Potential drivers of (office) demand?

## Unemployment Falls When Technology Booms



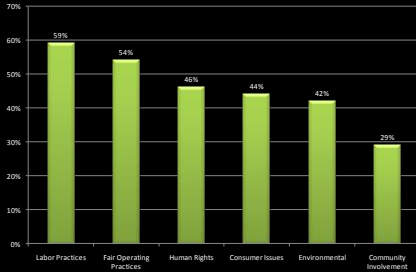


# Potential drivers of (industrial) demand?



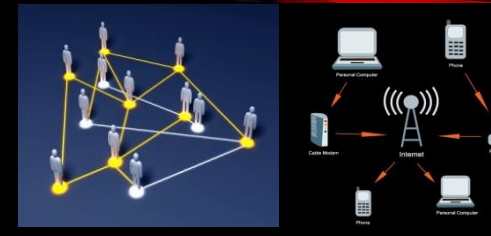
# External and Regulatory Implications

What's Driving Corporate Sustainability and Responsibility?



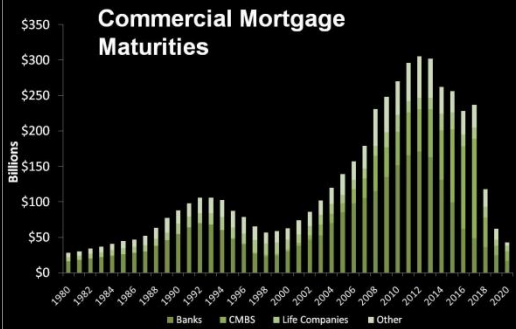
## Corporate Responsibility and Sustainability

## Globalization

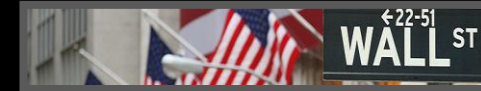


## Technology

Commercial Mortgage Maturities



## Emerging Regulations

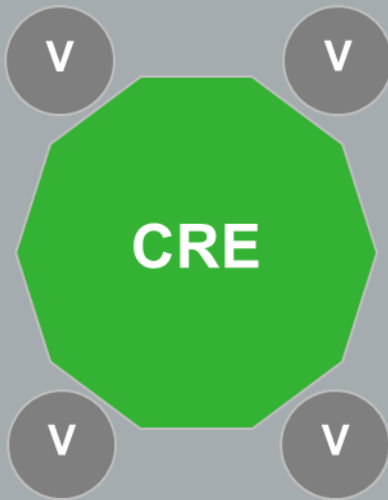


## Global Capital Markets



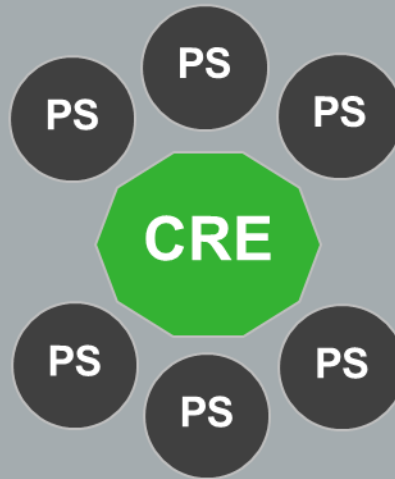
# The evolving role of the broker and service provider?

1980s



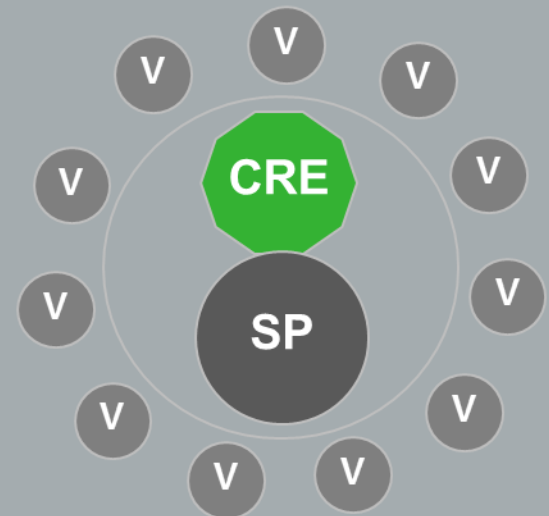
- Large CRE departments
- Few vendors
- Some out-tasking

Mid 1990s



- Smaller CRE departments
- Few preferred suppliers

Early 2000s



- Small strategically focused CRE
- Strategic partner functions as regional and global CRE group



# Fee Compression

Will it get better – or worse?





**Where do you  
see the biggest  
potential  
disrupters in  
our industry?**



# Audience Q&A



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Carolinas HealthCare  
System



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Waste Management



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Corporate Portfolio  
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# Looking ahead...

