Activating workplaces for the new generation of occupiers

Workplace App Review

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Background

The modern office user now demands much more from their workplace than a fixed desk and coffee machine.

As a result, the office market is being transformed, redefining how people interact with space. Office environments are now a critical part of how a person engages within a business. It underpins professional growth, productivity and collaborative working whilst also helping personal wellbeing. The working space is also a central component when recruiting and retaining the best talent.

Employers are looking for ways to approach co-working and flexspace offices so that businesses can adapt successfully. The physicality and amenities of a workplace are important but technology or digital services - often in the form of mobile apps - are an intrinsic way to make this change.

They are a key component in how employers communicate and understand how a workplace is being used, as well as appreciating what employees want and need to feel fulfilled by their working environment.

These workplace apps offer staff a one-stop shop portal for managing their day-to-day working lives in the office, and give the employer, or space provider, vital data as well as a more direct way to engage with the building occupants. They are ultimately creating a greater sense of community within office the environment.

To service this demand, the market has been flooded with apps promising a business everything it needs to understand and interact with its people.

However, no two businesses are the same and therefore the technology required is different.

To support its clients and the wider market, JLL and Bewonder* partnered with LIQUID Real Estate Innovation to undertake a desktop review of some of the most popular office workplace apps available on the market today.

This review is intended as a high-level summary of the marketplace, highlighting the key similarities and differences between the various providers, and offers vital insight into what to consider when choosing the right product for your building or workplace.

Executive summary

27 mobile workplace applications in the UK. 12 provided sufficient information to be included in this review.

- **The products and services vary by supplier, however there are some key commonalities:**

  - Off-the-shelf solutions which can be deployed quickly.

  - Customisation to location or brand of the client.

  - Tailored for residential, retail or office users, with some focussed more on the end user while others on the building operator.

  - Many seek to create community engagement within a building or locality.

- **This is an evolving marketplace with patchy global coverage -** the average age of the providers is 9 years, with the oldest starting out in 2000. Five are UK-based companies. None offer full global coverage, but many are growing rapidly – focussing initially on core western cities.

- **Value proposition varies –** Some started out life in the residential sector, and so are more tailored to support personal needs of the individual. Some come from a retail background, so focus more on retail promotions and amenities. Others come from the flex office market and therefore offer strong peer-to-peer communication and networking. Also some are specifically built for office building operation and management, so require systems integration to be fully functional.

- **Service as a service –** a key selling feature of many is the ability to create and curate communities – both in the building and the local area. To support this, many providers include community or communication content curation as part of the service while others put this in the hands of the customer.

- **Software vs hardware -** two offer hardware options as well as the software, such as beacons or sensors to capture data in order to enable the user to better interact with the building, while many offer the possibility of integration with building hardware (at a cost). The most common integration is with building access control systems**.**

- **Integration is key to success -** as with most software, integration is possible. Indeed, many providers offer this and claim to do this as standard, at no extra cost. This is unrealistic so we encourage clients to understand the cost of integration before choosing a provider.

- **Difficult to compare pricing –** the fee models vary hugely – some charge by the floor area, some by the building and some by the user. Most have an initial set-up fee which is dependent upon scale and integrations. This makes it difficult compare providers purely on a cost basis.

- **There are 2 target users and three main-use cases across all the apps:**

  1. The building manager - for the purposes of improved operational efficiency;

  2a. The building occupant - for the purposes of creating and managing a community in the building or location;

  2b. For the purposes of personal efficiency and effectiveness in the workplace.

Matrix

Company	Founded	Market coverage	White labelled for customer as standard?	Primary target user	Secondary target user	Meeting room booking	Hot desk booking	Internal announcements	User chat function	Geo-tagging	Location based amenity/ services search	In-building purchases	Access control	Fault reporting	Local news, travel and or weather updates	In-building wayfinding	User control of proximity building services (e.g. lighting or cooling?)	Integration with third-party systems?	Customisation
A	2000	Global	●	Custom	Custom	● P/3P	● P/3P	● ICM	● 3P	●	●	● IP		● P/3P	●	●	● V/3P	●	●
B	2017	UK, US, Canada	●	Building Occupant	Building Manager	● P/3P	● P/3P		● P	●		● IP	●	● P/3P	●		● V/3P	●	●
C	2008	Europe, US	●	Building Manager	Building Occupant	● P/3P	● P	● ICM	● 3P	●	●	● IP		● P/3P	●		● V/3P	●	●
D	2011	Australia, US, UK	●	Building Occupant		● P	● P	● ICM	● 3P		●	● IP		● P	●	●		●	●
E	2005	UK	●	Building Manager	Building Occupant	● P	● P	● ICM	● P				●	● P	●			●	●
F	2009	Global		Building Occupant	Building Manager	● 3P				●			●	● P		●	● V/3P		
G	2014	Global	●	Building Manager	Building Visitor	● P	● P	● ICM	● P/3P	●	●	● IP	●	● P/3P				●	●
H	2016	Europe, US		Building Occupant	Building Owner	● P	● P	● ICM	● P			● IP	●	● P				●	●
I	2016	Global	●	Building Occupant	Building Owner	● P/3P	● P/3P	● ICM	● P	●	●	● EP	●	● P/3P	●	●	● V/3P	●	●
J	2000	Europe, US	●	Building Occupant	Building Manager	● P/3P	● P/3P	● ECM	● P			● IP	●	● P	●		● V/3P	●	●
K	2015	Global	●	Building Occupant	Building Manager	● P/3P	● P/3P	● ICM	● P/3P			● EP	●	● P/3P	●		● V/3P	●	●
L	2017	USA	●	Building Occupant	Building Owner	● P/3P	● 3P	● ICM	● P		●	● IP	●	● 3P	●		● V/3P	●	●

● Feature available (validated)
● Feature available (un-validated)

P - Proprietary
3P - 3rd Party
ICM - Includes Content Management
ECM - Excludes Content Management

IP - Includes Payment
EP - Includes Payment
V/3P - Via 3rd Party Integration

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Key findings

92%
are modular as standard, with only one fixed

75%
of the solutions are white labelled to the building or brand as standard

100%
of providers have made their apps available on both Android and iOS, all are hosted in the cloud, available via a web interface, as well as a mobile app

Only 33%
offer a free trial period

- **FOUR** companies charge based on the floor area
- **THREE** based on the number of buildings
- **TWO** charge according to the number of users
- **TWO** base it on the number of units of spaces
- **ONE** is undisclosed

42%
offer third-party integrations as standard

58%
can do this at a cost

8%
don't offer integrations

100%

Room and hot desk booking

All offer room-booking functionality, either via proprietary systems or integration with third-party systems, and all but one offer this for hot desk booking too.

92%
offer the function of sending announcements and communications to users, with

75%
offering content management as part of the service

Target audience

67% occupier as primary user

25% building manager/ owner as primary user

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Key findings

ALL BUT ONE have a direct peer-to-peer communication platform, with

50% using their own proprietary chat platform

33% offer the function for users to pay for services via the app

75% use geo-tagging to provide local travel, news and weather updates

75% utilise geo-tagging as a feature, meaning the user can locate themselves within their environment, and the proximity to amenities or service

100% offer the ability for users to report a fault or maintenance issue

Some offer a proprietary workflow tool in the app, with accompanying back-end admin functionality that could replace existing maintenance workflow tools, whereas others simply integrate with workflow tools

All but one offer integrations to allow users to access the building using the app

50% offer indoor wayfinding functionality, although this requires a level of integration with sensors and other infrastructure

TWO of the providers offer this package as additional services. Likewise **67%** offer integration with HVAC and BMS systems to give the user control over lighting and heating
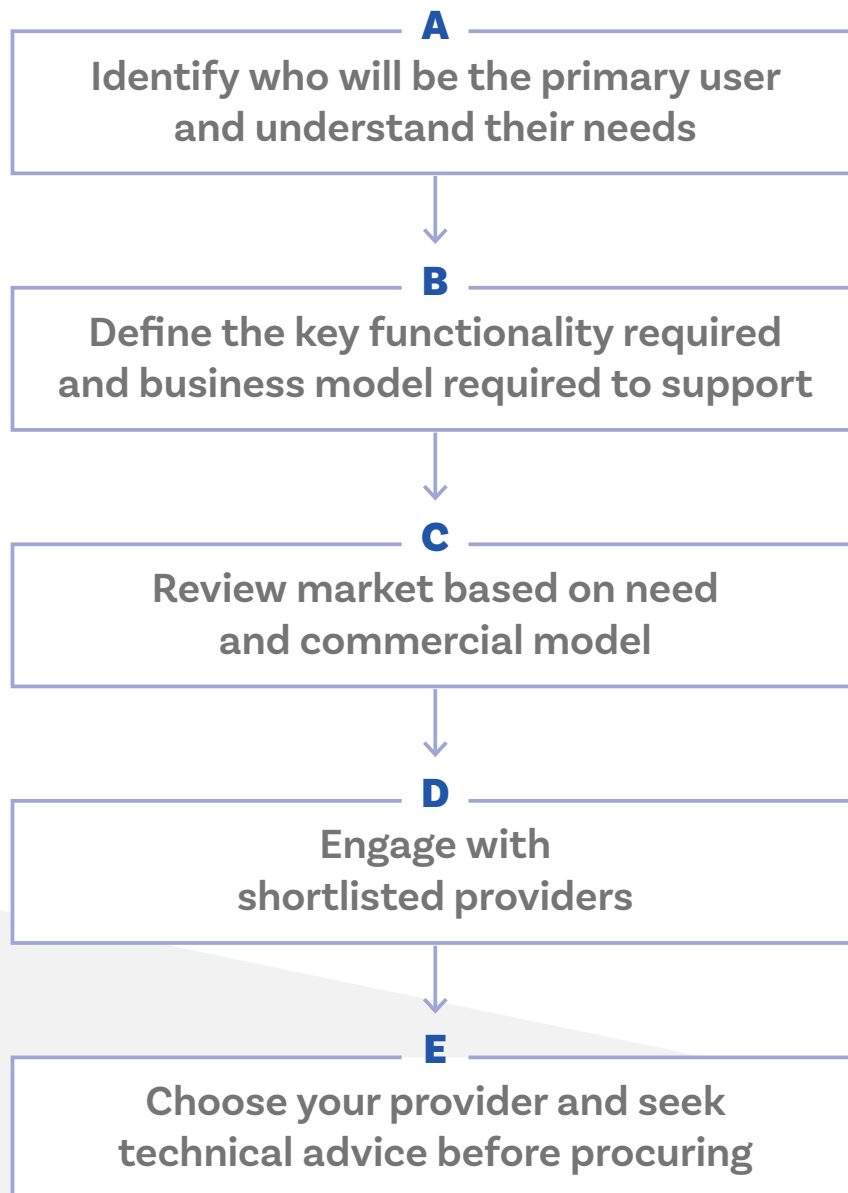
92% offer location-based services and promotions, with some managing the relationships with retailers and nearby services as part of the package. Indeed this is a key selling point for some of the providers

Some other common features found:

- Parking Management
- Document Management
- Surveys
- Delivery Management
- Visualisation
- Find/Meet Colleagues

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How do I choose the right app for my business?

A

Identify who will be the primary user
and understand their needs

↓

B

Define the key functionality required
and business model required to support

↓

C

Review market based on need
and commercial model

↓

D

Engage with
shortlisted providers

↓

E

Choose your provider and seek
technical advice before procuring

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How we can help and next steps

This review shows that there are many different solutions available on the market, so it is important to ensure you choose a product that best meets your objectives.

We can help.

The first step is considering the questions we have posed in this document to establish what your business needs are, and what you want your app to do for your business.

Supported by Liquid Real Estate Innovation we can talk you through the detailed findings behind this review to help you make the right choice. We can also help you get technical support to help navigate questions around integrations and data sharing.

For further information or to discuss your needs in more detail, please contact us.

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