

SURVEYING OCCUPANT EXPECTATIONS

**An Integrated Facility Management
Guide for a Post-COVID World**

A modern office interior with glass walls, white chairs, and green plants. The image is split into two main sections: a dark blue section on the left containing text, and a lighter blue section on the right showing a modern office space with glass walls, white chairs, and green plants.

INTRODUCTION

HOW WE GATHERED THESE INSIGHTS

In the rapidly changing field of facility management, gleaning the correct conclusions from often-conflicting information can be a challenge, especially as it relates to impacts on occupant experience. How can a facility manager know that their efforts will yield positive results? Building Operations Management and ABM teamed up to survey 135 facilities managers and executives on the key trends they're seeing in the FM space, and how they're incorporating them into their own operations.

While this survey was conducted right before the emergence of COVID-19 in the U.S., the results of the study are more relevant than ever given increased occupant demand for safe, efficient, and comfortable facility environments.

WEIGHING KEY FACTORS TO DETERMINE PRIORITIES

As we pick up from where facility trends left off, data shows that facility executives are aiming to prioritize the occupant experience now more than ever before. At the beginning of 2020, two-thirds of respondents said that occupant experience is more important to them now than it was five years ago, mirroring industry-wide trends that place emphasis on tenant attraction and retention through increasingly comfortable environments.

Today, facility managers are having to measure up against two top competitors—facilities that are willing to put the occupant experience first and the appeal of working from home versus in-office. According to the Pew Research Center, only 11 percent of current remote workers want to return to the office full time.¹ Developing a successful re-occupancy plan will mean going above and beyond to ensure your occupants have the resources and environment necessary to enjoy coming to your facility.

Even though occupant experience is clearly important to top management when it evaluates facility department performance, the survey data shows that one key facility-related factor is often overlooked. A growing body of evidence shows that the physical environment has a major impact on a wide variety of occupant outcomes, such as productivity, satisfaction, and wellbeing.

As you prepare for increased occupancy levels, it's important to note that a “return to normal” will not be enough to satisfy occupants. In fact, a survey conducted by Armstrong World Industries suggests that workers value overall wellbeing practically as much as they value physical safety and security.²

¹ <https://www.bloomberg.com/news/articles/2020-12-09/vaccines-herald-return-to-offices-but-workers-don-t-want-to-go>

² Wellbeing is As Important As Safety in a Post-COVID Workspace, Employees Say (triplepundit.com)



of respondents cited conflicting priorities as the second biggest factor to improving the occupant experience



identified tight budgets one of the biggest obstacles respondents faced in efforts to improve occupant experience



put length of budget review cycles on their list of barriers



of respondents said that support for key occupant outcomes was critical to the way their department is evaluated



called lack of time an obstacle



HOW IMPORTANT ARE THE FOLLOWING FACTORS IN THE WAY THAT YOUR DEPARTMENT IS EVALUATED?

FACTORS	Critical	Important	Not very Important	Not at all Important
CLEANLINESS OF BUILDINGS AND GROUNDS	50%	47%	2%	1%
MEETING SCHEDULES	24%	61%	15%	0%
PERFORMANCE TO BUDGET	44%	53%	3%	0%
RESPONSES TO OCCUPANT COMPLAINTS	56%	43%	1%	0%
SUPPORT FOR KEY OCCUPANT OUTCOMES	29%	61%	7%	3%

ALIGNING IMPORTANCE AND EXECUTION

The survey probed the impact of facility operations on the people who work, study, heal, shop, or carry out other important activities in buildings. Prior to COVID-19, responses showed that the key for facility executives is to excel at the basics: a clean, comfortable workplace with a responsive facility team is at the heart of a positive occupant experience. However, a “clean, comfortable workplace” is now the bare minimum for facility managers to offer. As life begins to return to a version of normalcy, occupants will have higher expectations for cleanliness and overall comfort and lower tolerance for building malfunctions like burst pipes or electrical downtime.

Given their importance, these operational factors deserve their place as FM priorities. But the survey implies that there’s some room for operational improvement in a significant number of facilities. While a majority of respondents scored their performance as solid in all four areas, the survey suggests a gap between importance and execution.

13%

of respondents ranked themselves as exceptional, when asked about their ability to deliver comfortable temperatures

26%

said their performance could be better

#1

How responsiveness ranked out of the four top operational factors shaping occupant experience

35%

scored their performance as exceptional

15%

indicated that responsiveness could be better

Q HOW DO YOU RATE YOUR ABILITY TO DELIVER GOOD OCCUPANT EXPERIENCE IN THESE AREAS?

ABILITY TO DELIVER GOOD OCCUPANT EXPERIENCE IN THESE AREAS	Exceptional	Solid	Could be better	Poor
A CLEAN WORKSPACE	24%	63%	13%	0%
ABILITY TO TRACK & MANAGE WORK ORDERS	24%	56%	18%	2%
COMFORTABLE TEMPERATURES	13%	61%	26%	0%
GOOD INDOOR AIR QUALITY	22%	58%	20%	0%
GOOD, ENERGY EFFICIENT OPERATIONS	9%	39%	45%	7%
QUICK RESPONSES TO OCCUPANT REQUESTS AND CONCERNS	35%	49%	15%	1%
WELL MAINTAINED GROUNDS	17%	61%	22%	0%

COMMON OPPORTUNITIES TO IMPROVE

While most respondents gave themselves relatively high marks on facility operations, they were somewhat less satisfied with the design features in their buildings. The return of occupants will mean heightened awareness of every little detail in and around your facility, from surrounding landscaping to restrooms. In as little as one tenth of a second, a client can make a lasting judgement of your company and it's facility.³

According to a post-pandemic workplace survey conducted by the Silverado Roundtable, one-third of office workers say the design of an office would affect their decision to accept a job offer.⁴ Post-COVID design features like low-energy electric door operators and hands-free light switches are expected to become more mainstream as facility reoccupation numbers increase.

³ What does your office say about your company? CMD (cmd-ltd.com)

⁴ Post-Pandemic Workplace: Bright, Light, and Plant Filled, New White Paper Finds (yahoo.com)



26%

indicated that the design could be better or was poor in terms of offering a smart, connected workplace



31%

said that aesthetics and space flexibility could be better



39%

saw room for improvement with energy efficient design

HOW WELL DO YOUR FACILITIES DELIVER GOOD OCCUPANT EXPERIENCE IN THESE AREAS?

DELIVER GOOD OCCUPANT EXPERIENCE IN THESE AREAS

	Exceptional	Solid	Could be better	Poor
A FLEXIBLE PHYSICAL ENVIRONMENT	11%	58%	31%	0%
A SMART, CONNECT WORKPLACE	19%	55%	22%	4%
AESTHETICS OF SPACE	17%	52%	31%	0%
AVAILABILITY OF FOOD & BEVERAGE OPTIONS (E.G. COFFEE BARS)	15%	52%	31%	0%
CONVENIENT PARKING	18%	57%	25%	0%
ENERGY EFFICIENCY	10%	51%	38%	1%
MEASURES TO IMPROVE OCCUPANT WELLNESS	8%	49%	39%	4%
ON-SITE AMENITIES	12%	31%	42%	15%
SUSTAINABILITY PROGRAMS	6%	48%	38%	8%
VIEWS OF THE OUTDOORS	17%	47%	31%	5%



THE ONGOING ROLE OF TECHNOLOGY

One of the largest effects of COVID-19 on society has been an exponential reliance on technology. In the facilities management industry alone, the adoption of technological assets like automatic doors, contactless faucets and fixtures, and touchless parking deck pay stations has been an increasing trend.

Facility executives responding to the pre-pandemic survey ranked technology behind design and operations as the biggest opportunity to improve occupant experience. Nevertheless, the survey data contains abundant evidence that facility executives understand the value of technology and that interest in applying new technology to improve occupant experience will only continue to grow.

**WHICH OF THESE TECHNOLOGIES HAVE YOU
IMPLEMENTED OR DO YOU PLAN TO IMPLEMENT IN
ORDER TO IMPROVE OCCUPANT EXPERIENCE?**

APPLICATIONS OF ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING IN BUILDING SYSTEM	16%
BUILDING INTERNET OF THINGS TOOLS AND PLATFORMS FOR GATHERING AND ANALYZING INFORMATION ON OCCUPANT USE OF SPACE	35%
BUILDING INTERNET OF THINGS TOOLS AND PLATFORMS FOR GATHERING AND ANALYZING INFORMATION ON ENERGY CONSUMPTION	44%
DATA ANALYTICS	42%
DRONES	15%
MOBILE ENHANCEMENT TECHNOLOGY	27%
ROBOTICS	5%
TECHNOLOGIES THAT PROVIDE OCCUPANTS WITH GREATER CONTROL OVER TEMPERATURE AND LIGHTING	35%
TUNABLE LEDS	42%
VIRTUAL REALITY/AUGMENTED REALITY TOOLS	4%

OUTSOURCING REMAINS POPULAR

The survey data shows that outsourcing will continue to be an important strategy for facility executives. Data from BOM's annual Facility Pulse survey suggests a slow but steady increase in outsourcing. The Facility Pulse outsourcing results have remained consistent for the past 10 years regardless of the economy: approximately twice as many respondents indicate increases as decreases, a difference that would lead to a significant increase in outsourcing over time. Post-pandemic, these numbers are only expected to rise. A comprehensive outsourced maintenance team can ensure that your facility's inner and outer workings are in peak condition, resulting in satisfied returning occupants and more time for facility managers to focus on core competencies.

In conversations within the industry, it is sometimes said that facility service outsourcing contracts ultimately go to the low bidder. The survey data shows that, while price is indeed a major consideration, most facility executives take a nuanced approach that balances both cost and quality. As occupants begin to return with higher facility expectations than ever before, facility managers might need to consider prioritizing quality services over cost savings to meet these changing needs. Outsourcing just one service can make a big difference. In fact, one third of companies see an improvement in cleanliness quality after outsourcing their custodial services alone.⁵

 47%

of respondents expect to increase their use of outsourcing in the future

 73%

of respondents would consider outsourcing HVAC and mechanical

 68%

would consider outsourcing both janitorial and landscape services

 45%

agreed that, while costs are important, they put a lot of emphasis on quality in the final decision

 11%

said that they focus very heavily on quality

⁵ <https://insights.encompassonsite.com/outsourced-custodial-services>



WHICH SERVICES WOULD YOU CONSIDER OUTSOURCING IN THE FUTURE?



HVAC AND MECHANICAL	73%
JANITORIAL	68%
LANDSCAPE AND TURF	68%
ELECTRICAL AND LIGHTING	52%
ENERGY	43%
ENGINEERING	43%
INTEGRATED FACILITY MANAGEMENT	41%

A man wearing a white hard hat and a light blue button-down shirt with the ABM logo on the pocket. He is holding a clipboard and looking towards the camera. The background shows industrial equipment with yellow and green pipes.

MOST LIKELY SERVICES TO OUTSOURCE

Survey respondents ranked HVAC and mechanical as the most likely services to outsource, followed by janitorial and landscape maintenance. As post-pandemic life continues to evolve, these numbers are likely to shift, with an even greater focus on HVAC and janitorial outsourcing moving forward. Facility reoccupation will mean a heightened awareness of occupant safety and overall comfort. According to a survey commissioned by The Workforce Institute, 45 percent of employees and business leaders report overall cleanliness as a top workplace concern going forward.⁶ Facility trends show that the demand for improved ventilation solutions and advanced cleaning services will continue through the coming years.

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⁶ COVID-19 Reveals, Reshapes Employee Concerns, Study Finds | EHS Today

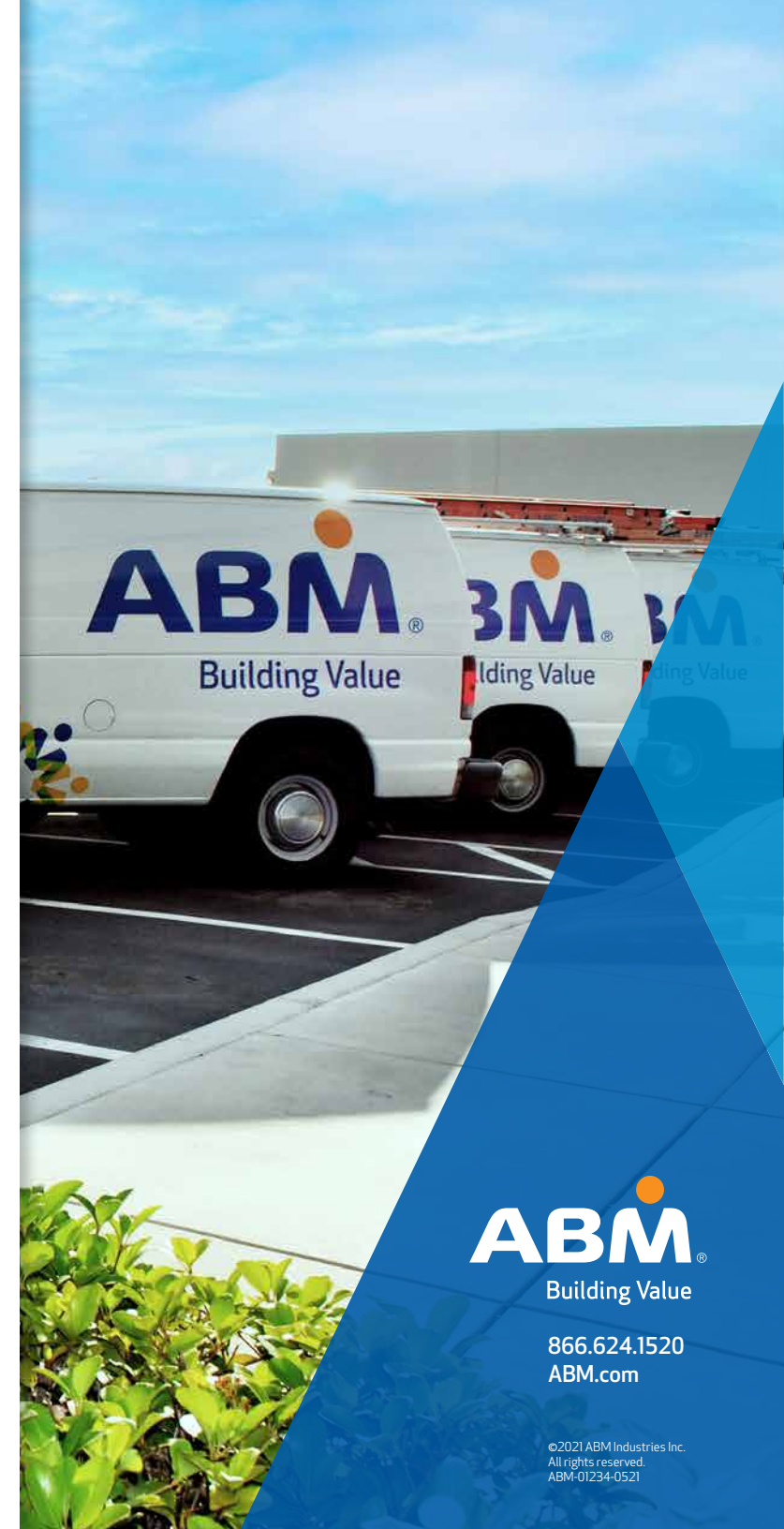
CONCLUSION

Organizations today clearly understand both the importance of occupant experience and the central role that facilities play in improving that experience. While facility executives look to design, operations, and technology to provide a better experience for returning occupants, challenges remain, especially tight budgets and conflicting priorities. COVID-19 undoubtedly changed countless ways of life, and it's clear that occupant expectations for clean, safe, and appealing facilities has and will continue to grow. Meeting (and exceeding) these expectations will play a key role in determining occupant satisfaction and the long-term success of your client's business

To learn more, visit [ABM.com](https://www.abm.com) or call 866.624.1520.

About ABM

ABM (NYSE: ABM) is a leading provider of facility services in the United States and various international locations. ABM's comprehensive capabilities include janitorial, electrical & lighting, energy solutions, facilities engineering, HVAC & mechanical, landscape & turf, mission critical solutions and parking, provided through stand-alone or integrated solutions. ABM provides custom facility solutions in urban, suburban and rural areas to properties of all sizes - from schools and commercial buildings to hospitals, data centers, manufacturing plants and airports. ABM Industries Incorporated, which operates through its subsidiaries, was founded in 1909. For more information, visit [ABM.com](https://www.abm.com).



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