US Workplace Trends Survey Results

The Global Workplace Trends Survey was conducted during the summer of 2012. The survey was completed by 2,475 global facility management (FM) and architect and design (A+D) professionals from four regions and 12 countries including:

- North America (NA): Canada and the US
- Latin America (LA): Argentina, Brazil, and Mexico
- Europe, Middle East, and Africa (EMEA): Russia, South Africa, and the UK
- Asia Pacific (APAC): Australia, China, India, and Japan

Demographic information was collected on company size, industry segment, and geographic location, allowing analysis of the data through these filters to identify any statistical differences. The following information represents US results for FM and A+D (reporting on their customers), totaling 710 respondents. Throughout the document, definition of company size is as follows: small (50-1,200 employees), medium (1,201-5,000 employees), and large (5,001-10,000+ employees).

Key Insights

- **Increasing employee engagement is an area of focus for both A+D and FM.**
- **According to FM individual space decreased 15 percent and group space increased 15 percent between 2007 and 2012.**
- **FM anticipates no change to space use in the near future; A+D anticipates a decrease in individual space and an increase in collaborative space, among other things.**

FINDINGS—REAL ESTATE

Top Change Drivers

FM

1. Growth
2. Cost effectiveness
3. Continuous improvement/ efficiency

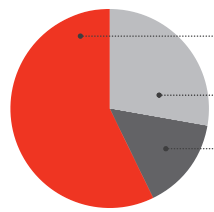
A+D

1. Cost effectiveness
2. Continuous improvement/ efficiency
3. Attraction & retention

Small companies have 18% – 24% more space dedicated to a single worker than medium to large companies.

Large companies have 7% more space dedicated to individuals sharing a space as compared to small to medium companies.

Owning/Leasing Workplace Facilities (FM Only)

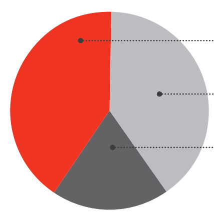


58% **Own** their workplace facilities

27% **Own and lease** their workplace facilities

15% **Lease** their workplace facilities

Designation of Space (FM Only)



41% Dedicated to a **single worker**

40% Dedicated to **individuals sharing a space**

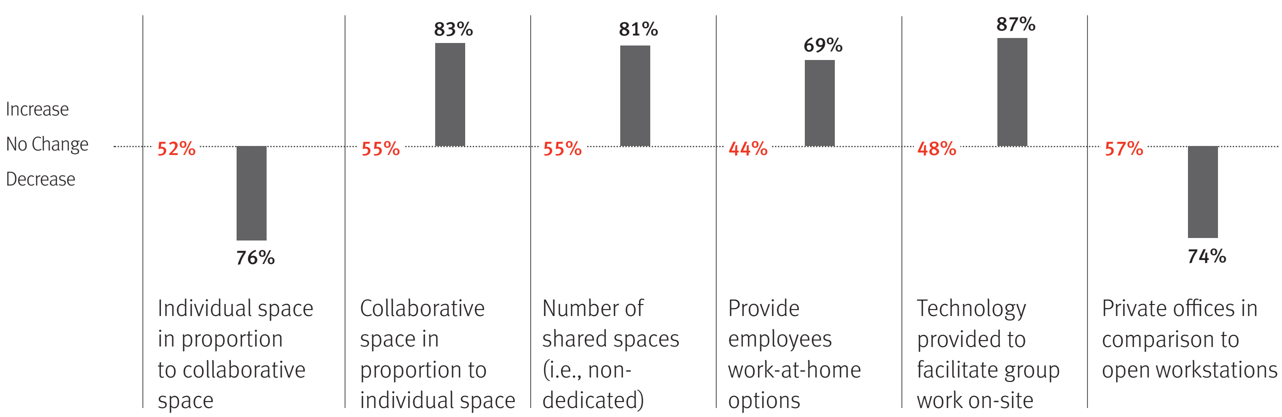
19% Dedicated to **hoteling or free address space**

FM and **A+D** agreed on the most important office design considerations, but A+D felt more strongly about them.

44% | 70%
Collaboration and new forms of group work

43% | 63%
Attraction of top talent

Anticipated Facility Space Use Changes by 2015

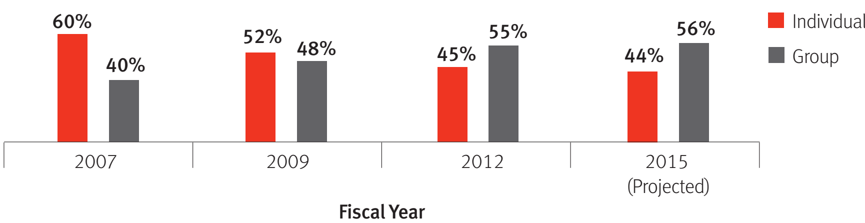


Workplace Trends

FINDINGS—SPACE ALLOCATION

Space Allocation of Individual and Group Spaces Over Time (FM Only)

Graph represents Workplace Trends data:



More **A+D** than **FM** say the cubicle is most prevalent type of workstation (over bench or beam).

67%

59%

FINDINGS—MOBILITY (FM ONLY)

Work Arrangements Primarily Supported by their Company

60%
Working from home

58%
Working from remote workplaces owned or leased by the company

55%
Working from remote workstations shared across shifts

FM indicate that 32% of their employees would be considered mobile workers (spend 50% or less time in the workplace).

FM indicate that 29% of their employees work from home at least one day a week compared to 17% three years ago.

FINDINGS—ENGAGEMENT

Designing for Engagement

91% of FM and **96% of A+D** indicate that efforts are made to create spaces that help improve employee engagement.

FM and **A+D** both agree on the top five ways in which employee engagement is addressed, but at varying levels.

	FM	A+D
Creating a sense of community and belonging	66%	83%
Helping people understand strategy, culture, and brand	56%	71%
Supporting diverse work needs and preferences	52%	63%
Caring for the whole person and health positive needs of an individual	49%	40%
Supporting personal expression	47%	23%

FINDINGS—GENERATIONS

Designing for Generations

54% of FM and **78% of A+D** indicate that design considerations are made to address different generations in the workplace.

Generational Considerations Made by FM and A+D

70%	59%	57%	45%	43%
91%	67%	39%	69%	70%
Flexible workplace layout	Access to software and technology	Open plan workstation personalization	On-site amenities (e.g., gym, daycare)	Ability to work anywhere inside/outside the facility

FINDINGS—TECHNOLOGY

65% of FM indicate that technology is having a "high to transformative" impact on the way people work individually and as a group in the workplace.

Virtual Collaboration Tools the Company Offers (FM Only)

75%
Provide interactive meeting tools (e.g., WebEx™)

56%
Provide video conferencing

31%
Provide both cloud storage and social networks

19%
Provide mobile apps

Almost all **(92%) of A+D** say their clients have gone wireless; **91% of FM** say the same about their own companies.

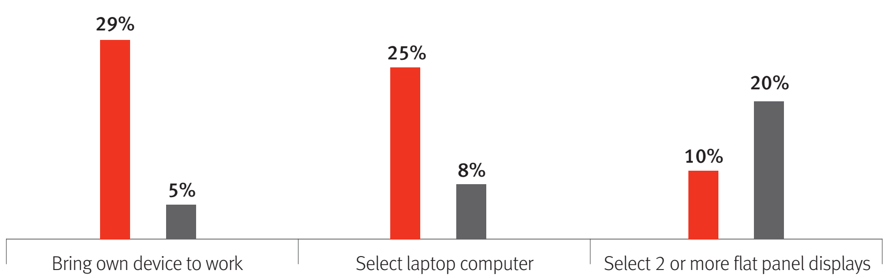
Both groups say more small and medium companies have wireless than large companies.

Small to medium companies:
93% | 91%

Large companies:
90% | 86%

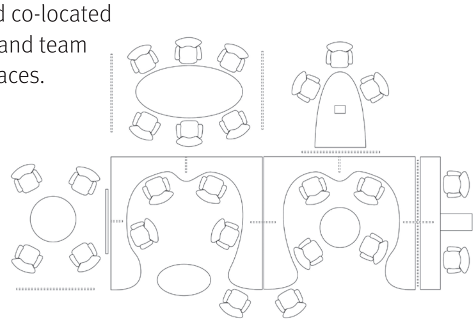
64% of FM indicate their company allows individuals to personally select technology devices at work.

33% of A+D indicate customers they work with allow individuals to personally select technology devices.

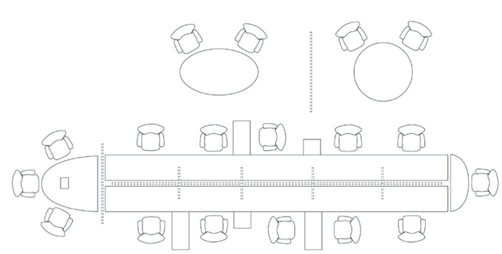


FINDINGS—INDIVIDUAL SPACE

When asked about their most recent project, the majority **(52%) of FM** say they used a layout incorporating individual and co-located workstations and team and group spaces.



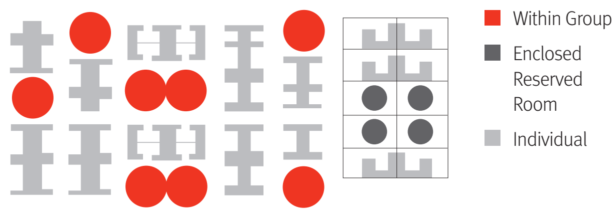
The majority **(42%) of A+D** say they used a layout incorporating a linear planning approach with co-located collaboration spaces.



FINDINGS—GROUP SPACE

When asked about the most prevalent type of collaborative space, the highest response among FMs (21%) was “Collaborative spaces located ‘within group’ (**red**) used by 2–4 people for knowledge sharing and co-creation work activities.”

15% chose “Collaborative spaces located in an ‘enclosed reserved room’ (**black**) used by 4–6 people for knowledge sharing.”



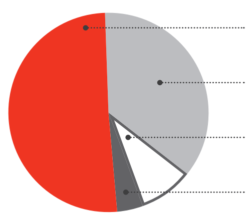
FM and **A+D** have different projections on the percentage of space dedicated to support collaboration 3 years from now:

	FM	A+D
Increase	40%	83%
Decrease	10%	2%
No Change	47%	14%
Don’t Know	4%	1%

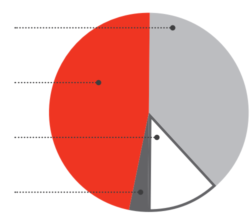
Anticipated Change to Space Dedicated to Support Collaboration by 2015 (FM Only)

Small to Medium Companies

Large Companies



Small to Medium Companies		Large Companies
51%	No Change	38%
36%	Increase	47%
9%	Decrease	12%
4%	Don't know	3%



51% of small to medium companies indicate space will stay the same.

47% of large companies indicate space will increase.