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. What follows are the results for FM professionals only, totaling 1,944 respondents. The number of total respondents by region include: NA (455), LA (438), EMEA (448), and APAC (603). The results are listed by region and/or by country, as appropriate, and, unless otherwise noted, represent the most frequent or highest percentage response.

Key Insights

- Increasing employee engagement is an area of focus in all geographies we surveyed.
- “Creating a sense of community and belonging” through space is the most popular means of improving employee engagement.
- Regarding the use of group and individual space in the next three years, the highest percentage of space use in all regions is expected to be team space.
In most countries, 35%-66% of workplace facilities are primarily owned, except in South Africa (47%) and China (64%), where facilities are primarily owned or leased.

From a list of 12 potential corporate change drivers, cost effectiveness was in the top two across all regions.

In all countries except the US, individuals sharing a space is the most common (41%-51%) designation of space. Individuals sharing a space refers to a workspace shared by at least two individuals.
Global Workplace Trends Survey Results

**Workplace Trends**

### Anticipated Facility Space Use Changes by 2015*

<table>
<thead>
<tr>
<th>Change</th>
<th>Individual space in proportion to collaborative space</th>
<th>Number of shared spaces (i.e., non-dedicated)</th>
<th>Provide employees work-at-home options</th>
<th>Technology provided to facilitate group work on-site</th>
<th>Private offices in comparison to open workstations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase</td>
<td>53% Brazil, China, India</td>
<td>48% Brazil, India</td>
<td>45% All other countries</td>
<td>50% Canada, US, UK, Japan</td>
<td>48% All other countries</td>
</tr>
<tr>
<td>No Change</td>
<td>51% All other countries</td>
<td>48% All other countries</td>
<td>50% All other countries</td>
<td>50% All other countries</td>
<td>50% All other countries</td>
</tr>
<tr>
<td>Other*</td>
<td>* “Other” was not defined for participants.</td>
<td>* “Other” was not defined for participants.</td>
<td>* “Other” was not defined for participants.</td>
<td>* “Other” was not defined for participants.</td>
<td>* “Other” was not defined for participants.</td>
</tr>
</tbody>
</table>

### FINDINGS—SPACE ALLOCATION

Bench/beam use is most prevalent in Latin America (Argentina, Brazil) and Asia Pacific (China, Japan).

### Design of New Workplaces/Major Renovations

All countries rely most heavily on in-house designers and independent A+D firms when designing new or renovating existing spaces.

The most popular response to the question about what facility managers look for when selecting A+D firms for projects was “knowledge and experience,” followed closely by “cost.”
Workplace Trends

FINDINGS—SUSTAINABILITY

**Sustainable Design Goals**

Respondents in all countries chose energy reduction as the top sustainable design goal, but they disagreed about what was second most important.

1. **Reduction of energy use**
   - All countries

2. **Employee involvement/awareness**
   - Canada, US, Brazil, South Africa, UK, Australia, China, India, Japan

**Material use reduction/recycling**
- Argentina, Mexico

**Lighting approaches**
- Russia

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**FINDINGS—WORKSPACE LAYOUTS**

When asked about their most recent facility project, facility managers identified the following workspace layouts as most commonly used:

A linear workstation layout incorporating adjacent group and collaborative spaces was most commonly used in Brazil, Mexico, Russia, and South Africa.

Argentina favored a linear planning approach with co-located collaboration spaces.

Individual and co-located workstations and team and group spaces were most commonly used in Canada, US, UK, Australia, China, India, and Japan.

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**Anticipated Dedicated Space Use by 2015**

Regarding the use of group and individual space in the next three years, the highest percentage of space use in all regions is expected to be team space (public/non-dedicated).

<table>
<thead>
<tr>
<th></th>
<th>NA</th>
<th>LA</th>
<th>EMEA</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open plan workstations—cubicles, benching, etc.</td>
<td>22%</td>
<td>20%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Enclosed private offices</td>
<td>16%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Team space (public/non-dedicated)</td>
<td>27%</td>
<td>32%</td>
<td>32%</td>
<td>39%</td>
</tr>
<tr>
<td>Conference/Training rooms</td>
<td>18%</td>
<td>22%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Work break areas (social)</td>
<td>11%</td>
<td>8%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>5%</td>
<td>20%</td>
<td>12%</td>
</tr>
</tbody>
</table>

*Results have been averaged across countries.*

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**Furniture Disposal**

Buy-back programs with manufacturers and the option to leave behind or donate furniture are the most popular disposal choices globally.*

<table>
<thead>
<tr>
<th>Country</th>
<th>Landfill</th>
<th>Leave behind/donate</th>
<th>Buy-back program with manufacturers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>54%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada, US, Argentina, Mexico, Russia, South Africa, UK, Australia</td>
<td>58%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil, China, India</td>
<td>59%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Results have been averaged across countries.
Workplace Trends

Projections on the Percentage of Space Used to Support Collaboration by 2015

Facility managers from most countries believe support for collaboration will increase, but at varying levels.

Change Management Program Activities Primarily Used

Globally, 50% of facility managers use large group gatherings and 42% use on-site IT support to communicate change in the workplace. On-site small group sessions was the most popular response only in China.

FINDINGS—MOBILITY

Work Arrangements Primarily Supported by Their Company

In Mexico, facility managers indicated equal support for working from remote workplaces, sharing workstations between shifts, and working from places like telework centers, café areas, or coffee shops.

86% of facility managers from China supported individuals working from remote owned/leased workplaces.

Percentage of workers considered mobile:
(i.e., spend no more than 50% of time in the workplace)

1-24%
Canada, US, Argentina*, Brazil, UK, South Africa, Australia, India, Japan

25-49%
Argentina*, Mexico, Russia, China

* Argentina results were evenly split between both percentage categories
Facility managers from all countries indicated that they are taking steps to create spaces that improve employee engagement.

Canada, UK, Japan
75-85%
US, Argentina, Brazil, Mexico, Russia, South Africa, Australia, India
86-95%
China
99%

Designing for Engagement

Facility managers from all countries indicated that they are taking steps to create spaces that improve employee engagement.

Designing for Generations

Facility managers from all countries except Japan are intentional about their use of design to address multiple generations in the workplace. In Japan, 45% of them indicated no design considerations are made to address different generations.

Top Three Ways Employee Engagement Is Addressed in Workplace

Facility managers from all countries selected “creating a sense of community and belonging” as the way they most frequently choose to increase engagement.

<table>
<thead>
<tr>
<th>Top three numerical rankings</th>
<th>NA</th>
<th>LA</th>
<th>EMEA</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating a sense of community and belonging</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Supporting diverse work needs and preferences</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Helping people understand strategy, culture, and brand</td>
<td>3</td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Supporting personal expression</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caring for the whole person and health positive needs of an individual</td>
<td></td>
<td></td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

Generational Considerations in the Workplace

Across regions, there are only slight differences in the top three design elements used to address generational differences in the workplace. At the country level, however, there are some unique findings. The selection of colors and design within the workplace is a “top three” design consideration in Argentina, Russia, and Japan, while the ability to work inside/outside the workplace is important in Mexico.

<table>
<thead>
<tr>
<th>Top three rankings:</th>
<th>NA</th>
<th>LA</th>
<th>EMEA</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexible workplace layout</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Selection of colors/design (Argentina)</td>
<td>3</td>
<td>(Russia) 3</td>
<td>(Japan) 2</td>
<td></td>
</tr>
<tr>
<td>Open plan workstation personalization (e.g., pictures, artifacts)</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>On-site amenities such as gym, café, daycare</td>
<td></td>
<td></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Access to software and technology</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Ability to work anywhere inside/outside the facility (Mexico)</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Hardware and Software Technology Impact

Globally, most facility managers (41%) said that consumer hardware/software provided by IT is having the most impact on employees in the workplace.
Globally, 67% of facility managers indicated technology is having a significant impact on the ways people work individually and 25% indicated technology is having a significant to transformative impact on people who work in groups.

### Top Three Virtual Collaboration Tools the Company Offers

**NA**
1. Interactive meeting tools, e.g., WebEx™
2. Video conferencing
3. Software platform, e.g., SharePoint™

**LA**
1. Video conferencing
2. Social networks
3. Software platform, e.g., SharePoint™

**EMEA**
1. Video conferencing
2. Cloud storage system
3. Social networks

**APAC**
1. Video conferencing
2. Mobile apps/other technology
3. Software platform, e.g., SharePoint™

### Ranking of Wi-Fi Use in Facilities

Use of Wi-Fi on facility projects:

- **Canada**: 96%
- **US**: 95%
- **Argentina**: 94%
- **Brazil**: 93%
- **Mexico**: 92%
- **Russia**: 91%
- **South Africa**: 86%
- **UK**: 86%
- **Australia**: 85%
- **China**: 85%
- **India**: 85%
- **Japan**: 73%

**Video conferencing** is prevalent in all regions. Cloud storage systems are popular in EMEA, social networks in Latin America and EMEA, and mobile apps in Asia Pacific.

Facility managers in Latin America report having the highest use of Wi-Fi on facility projects.
Facility/Real Estate Team Collaboration with Information Technology

Facility managers from Brazil, India, China, and South Africa report having the highest level of collaboration between Information Technology and Facility/Real Estate teams in support of workplace change.

Workplace Technology Selection

Facility managers in Asia Pacific are most apt to provide individuals the option to select workplace technology tools.