



Global 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. 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.**

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FINDINGS—REAL ESTATE

Top Change Drivers

NA	LA	EMEA	APAC
1. Cost effectiveness	1. Growth	1. Continuous improvement	1. Cost effectiveness
2. Continuous improvement	2. Cost effectiveness	2. Cost effectiveness	2. Innovation
3. Safety	3. Innovation	3. Corporate brand/image	3. Sustainability/environmental

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

Most Important Workplace Design Considerations

When thinking about the design of workplaces, the highest ranked design considerations by facility managers were:

Collaboration and new forms of group work

Canada, US, Mexico, Russia, South Africa, UK, Australia, China

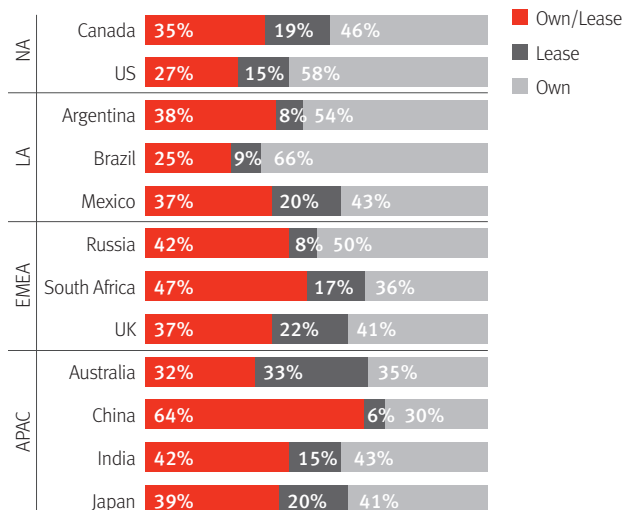
Attraction of top talent

Brazil

Workplaces that facilitate spontaneous exchange

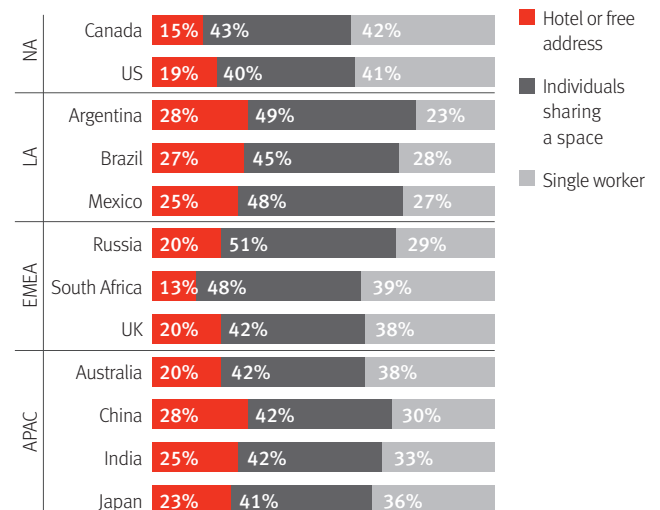
Argentina, India, Japan

Owning/Leasing Workplace Facilities



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.

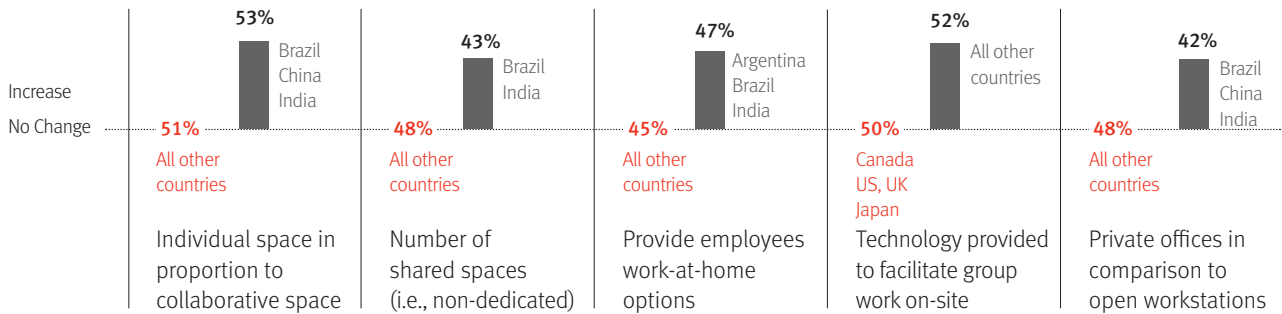
Designation of Space



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.

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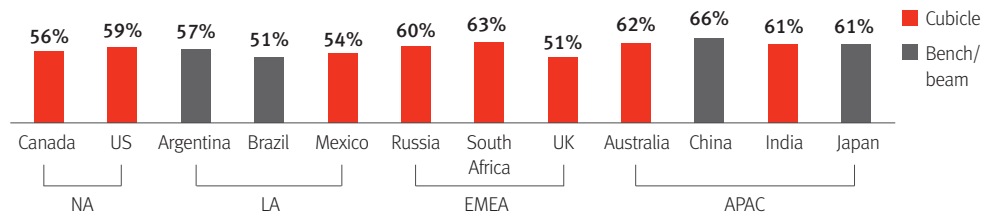
Anticipated Facility Space Use Changes by 2015*



* Results have been averaged across countries. No countries indicated that space use would decrease.

FINDINGS—SPACE ALLOCATION

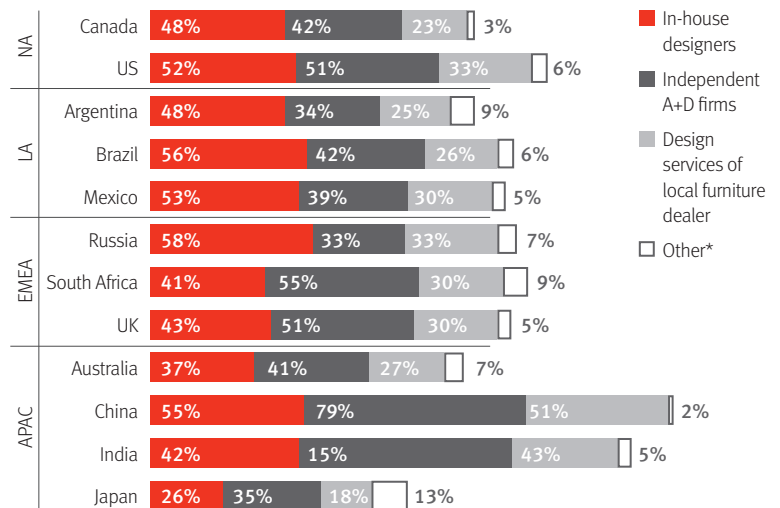
Bench/beam use is most prevalent in Latin America (Argentina, Brazil) and Asia Pacific (China, Japan).



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.”**



* “Other” was not defined for participants. Because of the way the question was framed, percentages across countries do not equal 100%.

FINDINGS—SUSTAINABILITY

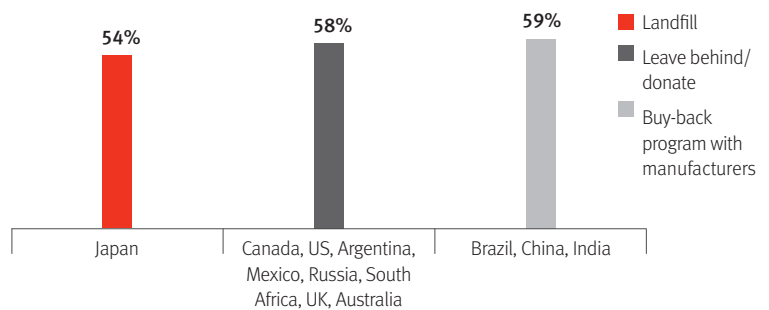
Sustainable Design Goals

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

Furniture Disposal

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



*Results have been averaged across countries.

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.

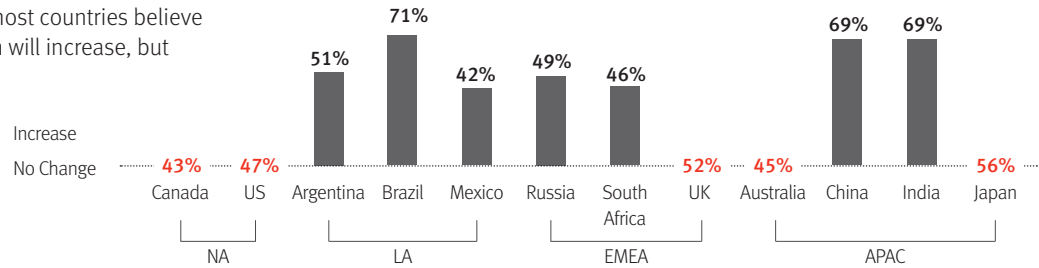
Anticipated Dedicated Space Use by 2015

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).

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

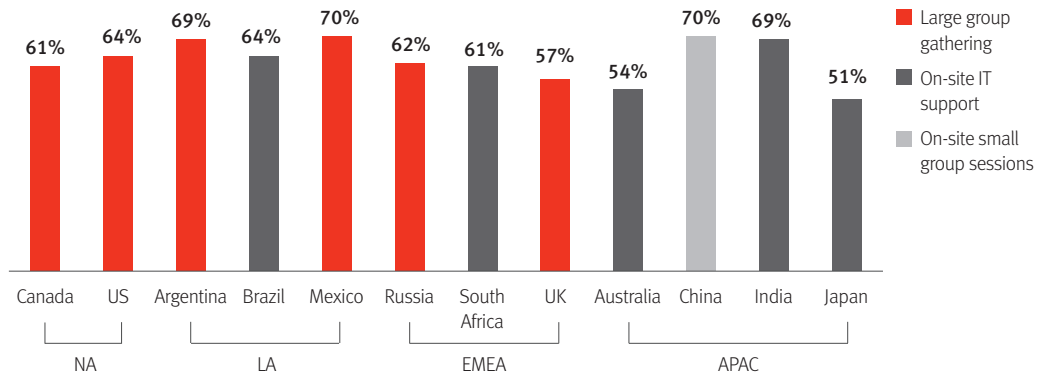
Projections on the Percentage of Space Used to Support Collaboration by 2015

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.



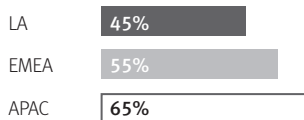
FINDINGS—MOBILITY

Work Arrangements Primarily Supported by Their Company

Working from home:



Working from remote owned/leased workplaces:



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

FINDINGS—ENGAGEMENT

Designing for Engagement

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%

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.

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

FINDINGS—GENERATIONS

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.

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.

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

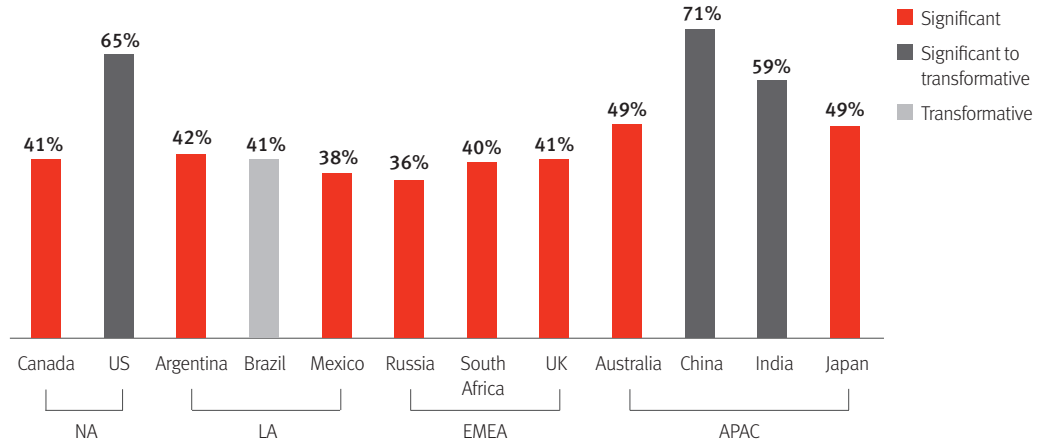
FINDINGS—TECHNOLOGY

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.

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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**.



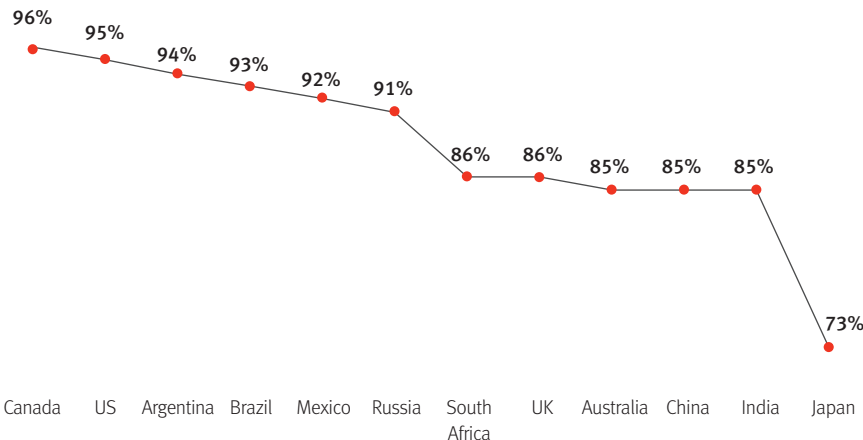
Top Three Virtual Collaboration Tools the Company Offers

NA	LA	EMEA	APAC
1. Interactive meeting tools, e.g., WebEx™	1. Video conferencing	1. Video conferencing	1. Video conferencing
2. Video conferencing	2. Social networks	2. Cloud storage system	2. Mobile apps/ other technology
3. Software platform, e.g., SharePoint™	3. Software platform, e.g., SharePoint™	3. Social networks	3. Software platform, e.g., SharePoint™

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.

Ranking of Wi-Fi Use in Facilities

Use of Wi-Fi on facility projects:

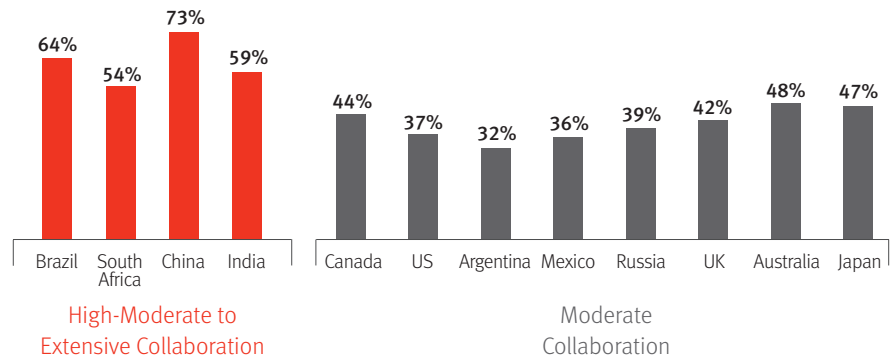


Facility managers in Latin America report having the highest use of Wi-Fi on facility projects.

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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.

