

Gensler

2013 U.S. WORKPLACE SURVEY

KEY FINDINGS

DESIGN MATTERS!

The design of the workplace impacts performance, employee engagement, and innovation. Our recent Workplace Survey sheds light on the relationship between design and business performance, uncovering opportunities to supercharge any work environment.

Gensler's 2013 U.S. Workplace Survey represents responses from 2,035 randomly sampled knowledge workers nationwide. The study examines the design factors that create an effective workplace; how design can better support knowledge worker engagement, satisfaction, and performance; and the influence of the workplace on organizational culture. **Currently, only one in four U.S. workers are in optimal workplace environments. The rest are struggling to work effectively, resulting in lost productivity, innovation, and worker engagement.** Our research directly compares today's workplace with the workplace of 2008 and shows that workplace effectiveness has fallen in aggregate. The 2013 survey identifies design strategies for how organizations can jump the trend and use better workplace design to drive innovation in the context of 2013 working realities.

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Saban Brands, Los Angeles, CA
cover: Gensler Los Angeles, Los Angeles, CA

HISTORY OF GENSLER WORKPLACE RESEARCH

Gensler’s 2013 survey is the latest iteration of ongoing research on the workplace, which began in 2005 with Gensler’s first workplace survey. A subsequent survey in 2006 established the connections between workplace design, employee productivity, and business competitiveness. In 2008, our research established a framework for understanding knowledge work through the lens of the four “work modes,” focus, collaborate, learn, and socialize. We discovered that the effectiveness and support of all four work modes connect to employee engagement and company performance.

Gensler’s 2013 U.S. Workplace Survey continues this thread by taking the pulse of the American workplace as it relates to employee effectiveness, business performance, and opportunities to create a culture of innovation. Parallel questions allow for direct comparison with data collected through Gensler’s 2008 survey. This puts our findings in the context of fundamental work and life shifts over that time period and points to solutions to realign today’s workplace with today’s world.

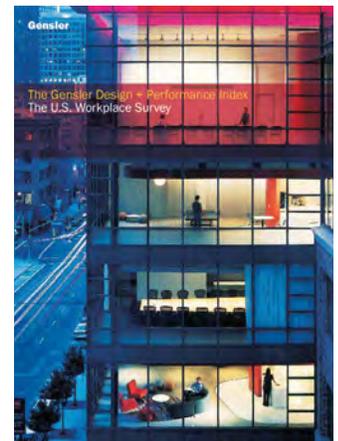
GENSLER’S WORKPLACE RESEARCH



2005
U.K. Workplace Survey

KEY FINDINGS:

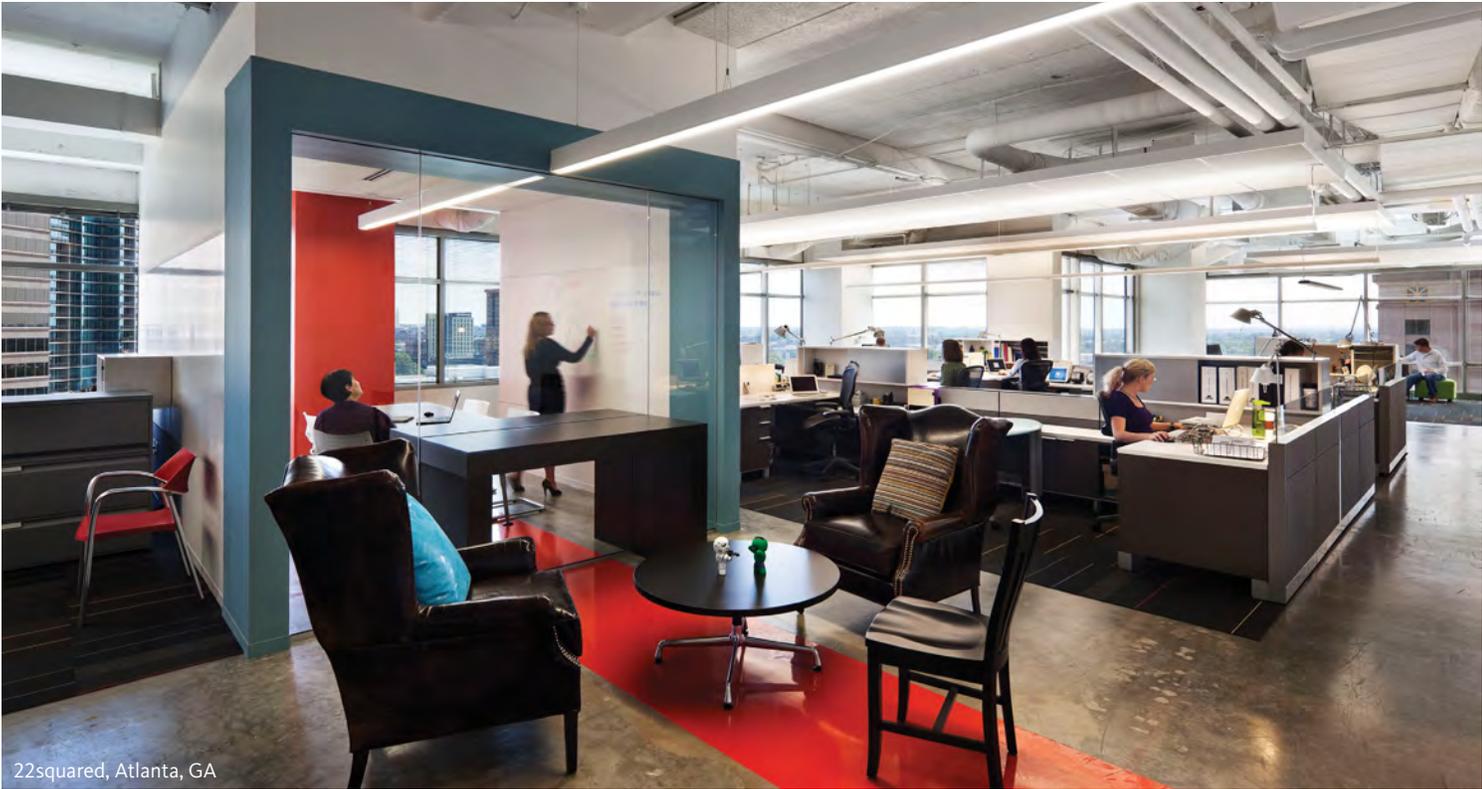
Employees see a clear link between the physical work environment and personal productivity. They also report the work environment as very important to job satisfaction.



2006
U.S. Workplace Survey

KEY FINDINGS:

The link is confirmed between the physical work environment and productivity in the minds of workers. Management-level respondents note workplace has a positive effect on the bottom line and company competitiveness.



22squared, Atlanta, GA



2008
**U.S. + U.K.
 Workplace Surveys**

KEY FINDINGS:

Four work modes—focus, collaborate, learn, and socialize—emerge as the framework through which to understand time at the office. Employees at top-performing companies value work modes more highly and have spaces that more effectively support each one.



2012
**What we've learned about
 focus in the workplace.**

KEY FINDINGS:

Analysis of Gensler's Workplace Performance Index (WPI) database uncovers that the effectiveness of space for focus is a key driver of the effectiveness of other work modes and workplace performance as a whole.



2013
**U.S. Workplace Survey
 Key Findings**

KEY FINDINGS:

Focus, balance, and choice in the workplace emerge as key drivers of satisfaction, performance, and innovation.

WHAT'S CHANGED IN THE WORLD, 2008-2013

Forces from technology to globalization to a new generation of workers are leading fundamental changes to where, how, and when today's knowledge workers perform their jobs. The confluence of these forces is resulting in new performance drivers for today's workplace and a series of new and exciting questions about what the workplace is—and more importantly—what it should be.

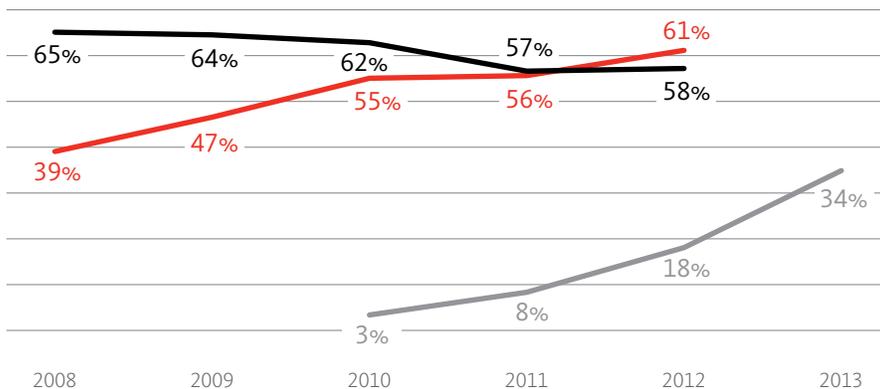
Our last national survey was released in 2008, in the midst of the worst economic downturn since the Great Depression with a U.S. unemployment rate of 5.8%. We stood at the cusp of a technological revolution of communication and information-sharing. Twitter was just over two years old and Facebook had

fewer than 100 million users. The iPhone hadn't celebrated its first birthday and many Millennials who today are entering offices across the U.S. were celebrating their Sweet Sixteens.

It goes without saying, the world in 2013 is a different place. The proliferation of new social and mobile technologies has revolutionized how we create, share and communicate. Today's world is connected like never before, but new connections mean new distractions and for many a compromised ability to focus. Many of today's workers also continue to struggle economically and are working longer hours or multiple jobs to make ends meet. These effects show in our sample - the ability of U.S. workers to effectively perform their job has declined since our last survey.

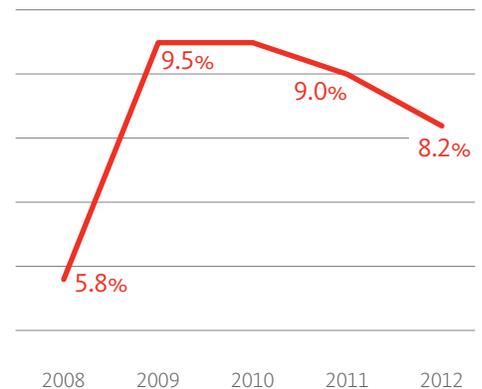
Percent of American Adults (18+) Who Own:

- DESKTOP
- LAPTOP
- TABLET



SOURCE: PEW INTERNET SURVEYS 2006-2013¹

U.S. Unemployment Rate

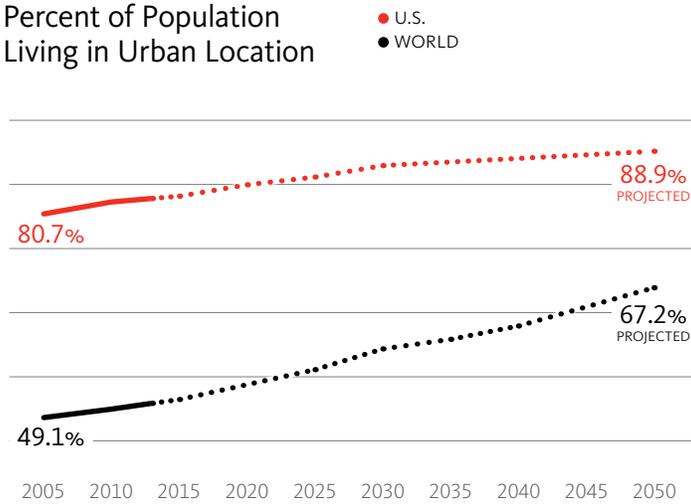


SOURCE: BUREAU OF LABOR STATISTICS, LABOR FORCE STATISTICS FROM CURRENT POPULATION SURVEY, AGES 16+²

WORKPLACE IN THE CONTEXT OF THE CITY

Globalization and urbanization continue to shift the business landscape. Currently, four-fifths of Americans live in cities and over 50% of the world's population, and that number is projected to grow significantly. Urban areas are increasingly understood as drivers of economic growth, culture, and innovation, resulting in new demands and constraints on space.

Workplace performance exists not only in conjunction with business success but with the character, form, and success of our cities. Increasingly, the workplace is not the sole location for work, but is a vital connection among myriad locations in which work happens. **Today's knowledge work happens not just at the scale of people and offices, but at the scale of buildings, cities, and ultimately the globe.** It is in this context that we continue to explore questions of focus, balance, and choice in today's, and tomorrow's, high-performance work environments.



SOURCE: POPULATION DIVISION OF THE DEPARTMENT OF ECONOMIC AND SOCIAL AFFAIRS OF THE UNITED NATIONS SECRETARIAT³



Shanghai Tower, Shanghai, China

KEY FINDINGS
2013 U.S. WORKPLACE SURVEY

1

**U.S. WORKERS ARE
STRUGGLING TO
WORK EFFECTIVELY**

**WHEN FOCUS IS COMPROMISED IN PURSUIT OF
COLLABORATION, NEITHER WORKS WELL.**

2

**EFFECTIVE WORKPLACES
BALANCE FOCUS AND
COLLABORATION**

**WORKPLACES DESIGNED TO ENABLE COLLABORATION WITHOUT
SACRIFICING EMPLOYEES' ABILITY TO FOCUS ARE MORE SUCCESSFUL.**

3

**CHOICE DRIVES
PERFORMANCE
AND INNOVATION**

**EMPLOYERS WHO PROVIDE A SPECTRUM OF CHOICES FOR WHEN
AND WHERE TO WORK ARE SEEN AS MORE INNOVATIVE AND HAVE
HIGHER-PERFORMING EMPLOYEES.**



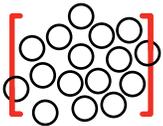
U.S. WORKERS ARE STRUGGLING TO WORK EFFECTIVELY

Extended workdays, new distractions, and downward pressure on real estate costs are compromising the effectiveness of the U.S. workplace. Strategies to improve collaboration proved ineffective if the ability to focus was not also considered. **When focus is compromised in pursuit of collaboration, neither works well.**



KEY FINDING ONE

INCREASED WORKPLACE DENSITY



From 2010 to 2012, the average square foot per person dropped from 225 to 176. This number is predicted to drop to as low as 100 sf/person by 2017.

SOURCE: CORENET GLOBAL⁴

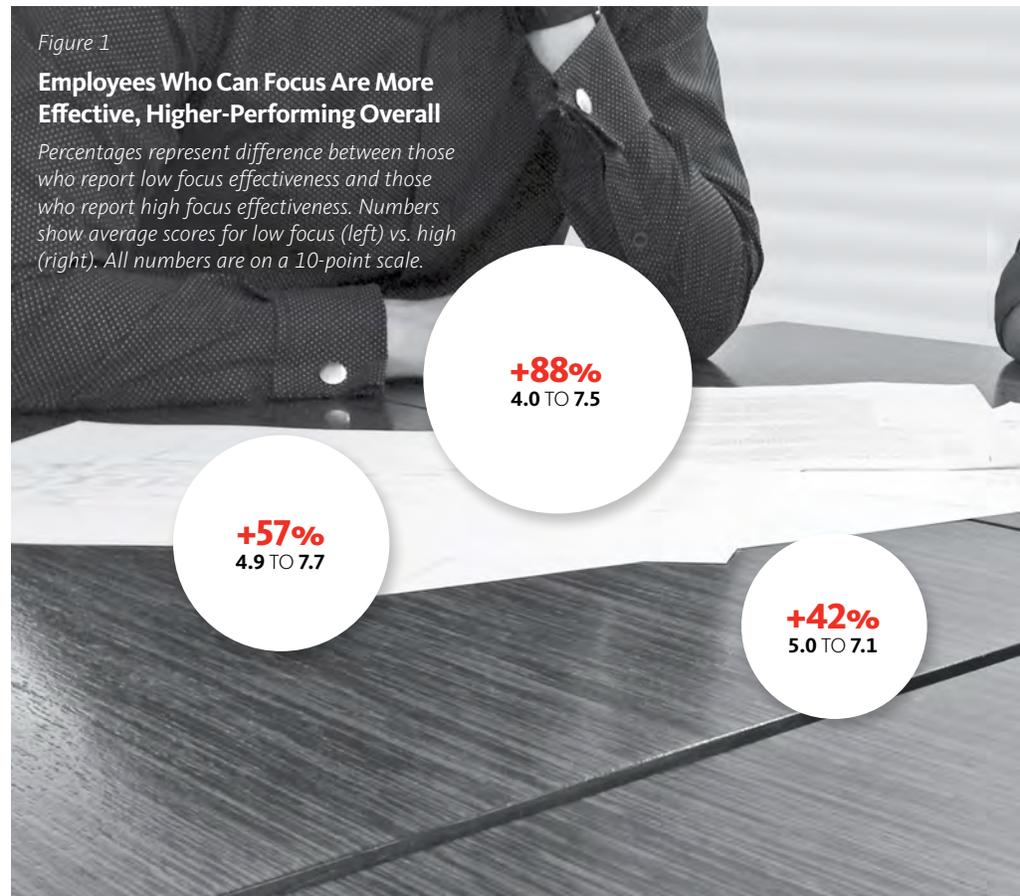
A WORLD OF DISTRACTIONS



53% of employees are disturbed by others when trying to focus.

42% use makeshift solutions to block out distractions in the workplace.

SOURCE: 2013 GENSLER WORKPLACE SURVEY (WPS)



COLLABORATION EFFECTIVENESS

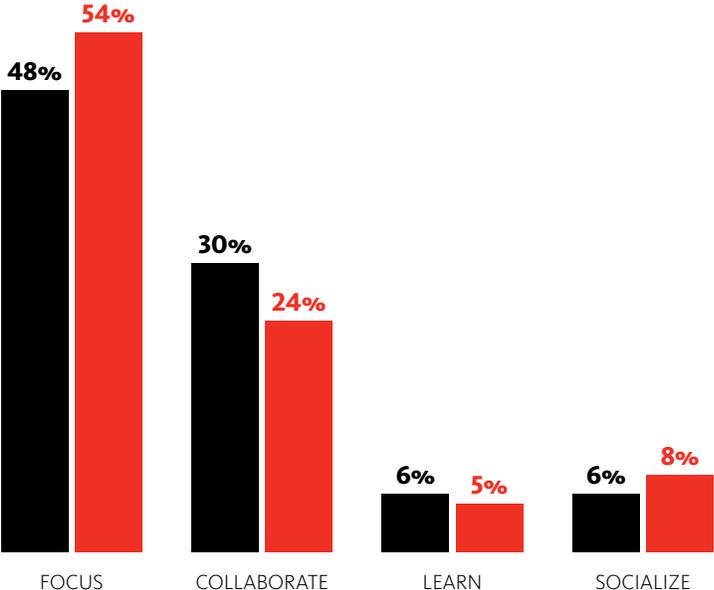
LEARNING EFFECTIVENESS

SOCIALIZING EFFECTIVENESS

Figure 2
**Knowledge Workers
Are Focusing More,
Collaborating Less**

Represents percentage
of average workweek.
Time not accounted for
in these percentages
was listed as "other."

■ 2008
■ 2013



+31%
4.9 TO 6.4

+14%
6.6 TO 7.5

+31%
4.9 TO 6.4

JOB
SATISFACTION

JOB
PERFORMANCE

MORE
INNOVATIVE

The ability to focus and complete one’s individual work is a baseline need for today’s knowledge workers. Meet that need and the overall effectiveness and performance of your workplace, and your employees, improves dramatically. More importantly, ensuring that your employees can focus also creates numerous opportunities to enhance performance and innovation through additional investment in the workplace and support for new ways of working.

Sadly, today’s workplace isn’t working for many U.S. knowledge workers. Overall workplace performance has dropped 6% as measured by aggregate WPI scores for Gensler’s 2008 and 2013 survey respondents. The overall decrease in the effectiveness of focus work as ranked by employees drove this decline. Survey results show focus as a key effectiveness driver—those who can focus are more satisfied, higher performing, and see their companies as more innovative (Figure 1).

Interestingly, this pairs with a shift in how employees report spending their time: Despite many workplaces designed expressly to support collaboration, time spent collaborating has decreased by 20%, while time spent focusing has increased by 13% (Figure 2).

2

KEY FINDING TWO

A SEARCH FOR QUIET



77% of employees prefer quiet when they need to focus.

69% are dissatisfied with noise levels at their primary workspace.

SOURCE: 2013 GENSLER WPS

FACE-TO-FACE ENDURES



A study by MIT researchers was able to predict 35% of a team's performance simply by measuring the number and quality of face-to-face interactions between team members.

SOURCE: HBR NEW SCIENCE OF BUILDING GREAT TEAMS, ALEX PENTLAND⁵

EFFECTIVE WORKPLACES BALANCE FOCUS AND COLLABORATION

While individual focus and collaborative work are often thought to be opposites, our research demonstrates that they function best as complements. Ultimately, **workplaces designed to enable collaboration without sacrificing employees' ability to focus are more successful.**

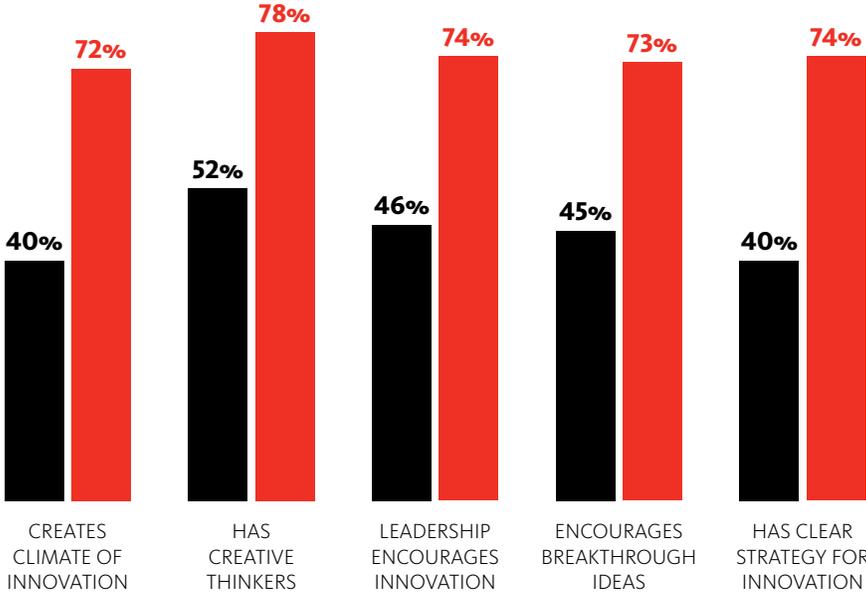


Figure 4

**Balanced Workplaces
Are More Creative,
More Innovative**

Percentage of employees who rank their company highly.

■ Not Balanced
■ Balanced



To uncover opportunities to optimize today’s workplace, we profiled workers in our sample who are currently working effectively. We learned that the ability to focus is a primary driver of effectiveness, but in today’s competitive workplace and economy it’s not enough. Collaboration remains key to the spread and development of ideas in pursuit of innovation. For employees whose workplaces support both their individual work and collaborative work, we see a significant spike in performance.

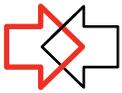
In all, 24% of respondents report their workplaces reflect that their companies prioritize both individual and collaborative work, or “balanced workplaces.” These employees indicate that their spaces are 22% more effective for focus and 17% more effective for collaboration compared with workplaces that do not support both. Importantly, our findings show that balance is possible in both open office and private office environments—of those who report balance, 44% occupy private offices, 11% shared offices, 44% open plan desks, with the remainder in unassigned seating.

The impact of balanced environments is felt beyond just work mode effectiveness. These respondents also see their companies as more innovative; are more satisfied with their jobs and workplace environments; and their workplaces are more effective overall as measured by Gensler’s WPI (Figure 3). They are also more likely to rank their companies highly on creativity and innovation (Figure 4).

3

KEY FINDING THREE

CHOOSING THE WORKPLACE



16% of employees believe they could focus most effectively at home.

73% believe they could focus most effectively in an office setting.

SOURCE: 2013 GENSLER WPS

AUTONOMY DRIVES PERFORMANCE, REDUCES TURNOVER



A Cornell University study of 320 small businesses showed that companies that grant employees choice in how to do their work grew at four times the rate and had one-third the turnover vs. control-oriented firms.

SOURCE: DRIVE, DAN PINK⁶

CHOICE DRIVES PERFORMANCE AND INNOVATION

Enabling choice with the right alignment of tools, policies, and spaces is an opportunity for companies to create a climate in which autonomous, engaged employees can make meaningful decisions to maximize their individual job performance. **Employers who provide a spectrum of choices for when and where to work are seen as more innovative and have higher-performing employees.**

Figure 5

Employees With Choice Are More Effective

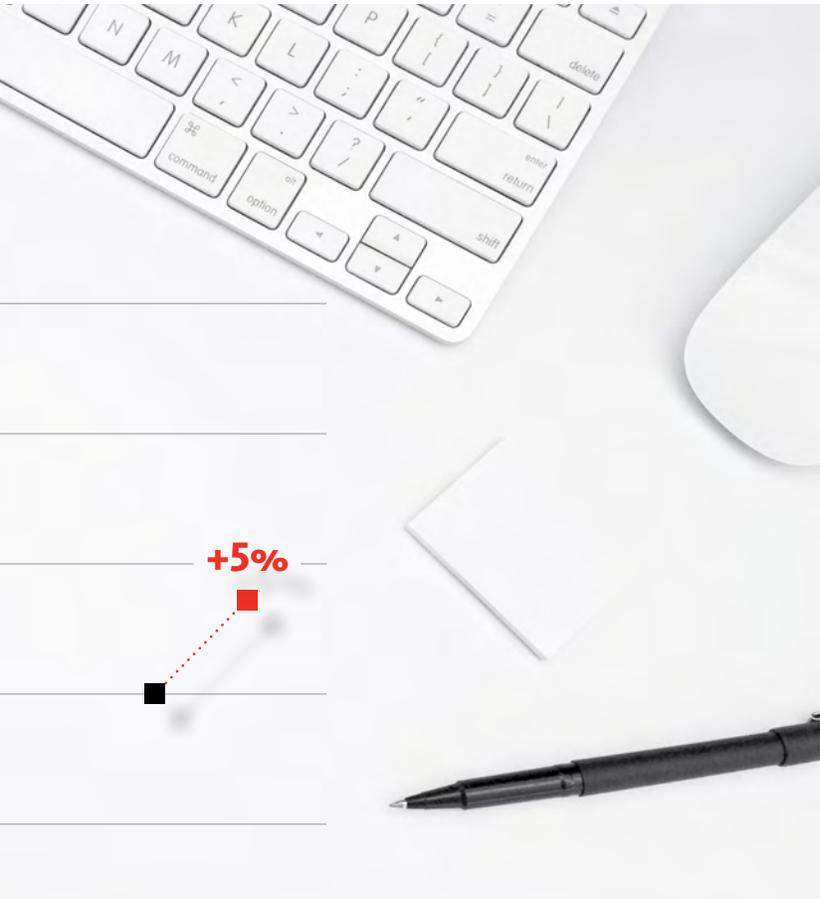
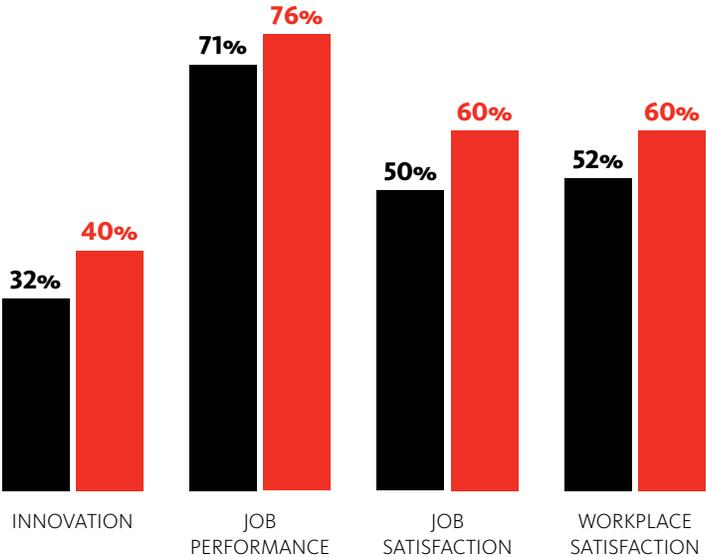
As ranked on a 10-point scale, where 10 = most effective.

■ Employees Without Choice
■ Employees With Choice



Figure 6
Choice Improves the Employee Experience
Percentage of employees who rank each factor highly.

■ Employees Without Choice
■ Employees With Choice



SOCIALIZING
EFFECTIVENESS

The lives of today’s workers are increasingly characterized by an abundance of choice. Mobile technology continues to make “anywhere” working a possibility for many and a necessity for some. A new generation of workers who grew up with social and mobile technology are bringing a new suite of expectations around flexibility and access as they continue to enter the workforce. To succeed, employers must follow suit by providing workplaces that support individual choice of when, where, and how to work.

Employers who offer choice in when and where to work have workers who are 12% more satisfied with their jobs and report higher effectiveness scores across all four work modes (Figure 5). Their employees are more likely to see their workplaces as balanced, more likely to rank their companies as innovative, more likely to be satisfied with their jobs, and are higher performing (Figure 6).

Employees without choice report organizational policy as the primary limit to their workplace autonomy and are also less likely to have tools that support mobility and anywhere working. Employees with choice are more likely to make decisions based on a need to connect to people and resources. Increasing choice doesn’t mean everyone is working from home—respondents with choice still spend the vast majority (70%) of their time in office settings.

THE OPPORTUNITY

Our research points to a number of design solutions and strategic actions that can improve employee experience, enhance performance, and drive innovation and success.



STEP 1

PROVIDE EFFECTIVE FOCUS SPACE

DRIVERS OF FOCUS

Functionality + Quality of Primary Space



SATISFACTORY NOISE LEVEL



FUNCTIONALITY



DESIGN LOOK & FEEL



Confidential Consulting Firm

STEP 2

COLLABORATE WITHOUT SACRIFICING FOCUS

DRIVERS OF BALANCE

Proximity + Availability of Alternative Spaces



MEETING SPACE



CIRCULATION & SUPPORT SPACE



IN-OFFICE AMENITIES



Autodesk, San Francisco, CA



Fallon Worldwide, Minneapolis, MN



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STEP 3

DRIVE INNOVATION THROUGH CHOICE

DRIVERS OF CHOICE

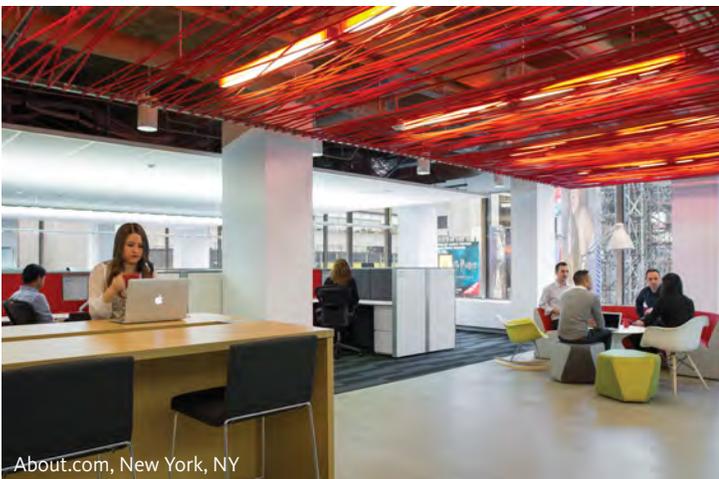
Enablers of Anywhere Working



Enabling employees to perform their jobs effectively begins with supporting the individual, focused work that represents the core of their days and a critical aspect of employee and team performance. But it doesn't end there. Layering in alternative spaces and opportunities that support all work modes, from collaboration to learning and socializing, enables the connections that drive success in today's knowledge economy. Across industries, we found that balanced workplaces—those prioritizing both focus and collaboration—score higher on measures of satisfaction, innovation, effectiveness, and performance.

Choice and autonomy also proved important to today's worker. Respondents with choice in when and where they work are higher performing, more satisfied, and see their companies as more innovative. Creating a balanced workplace presents opportunities to enable workplace choice through access to tools and technology that support anywhere working both in and out of the office. Companies must then pair the right tools and spaces with organizational policies that empower workers to best match space, tools, and tasks to achieve optimal productivity.

We see this framework of balance and choice as a building block on which companies can design solutions that represent their own work processes, cultures, and needs. One thing our research makes clear: In today's world, gathering and leveraging diagnostic and contextual data on what drives performance at the employee and organizational level is no longer a luxury. Identifying and proactively supporting the balance and choice that drive success is an opportunity to gain competitive advantage at a time when it's more necessary than ever.

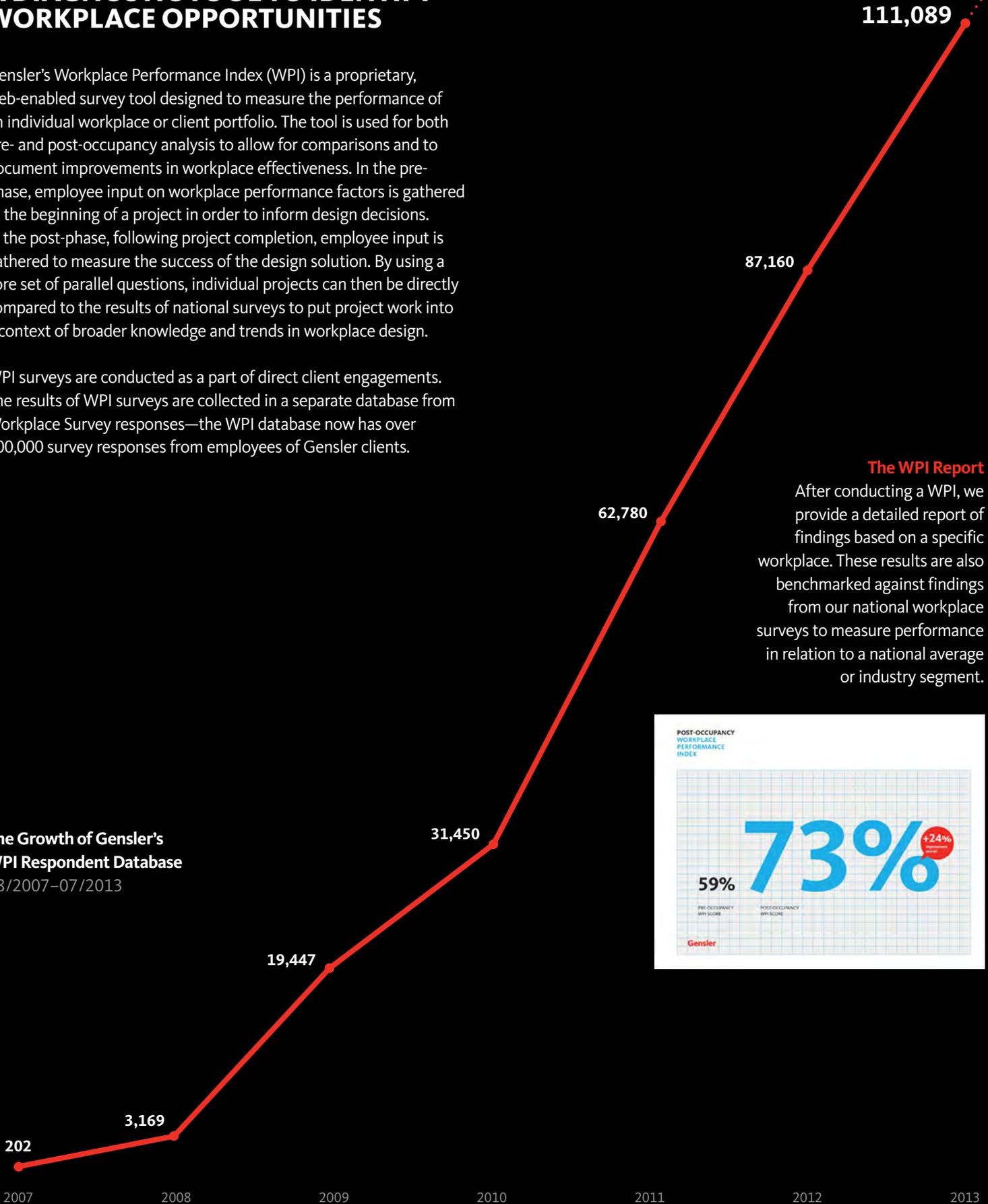


THE WORKPLACE PERFORMANCE INDEX™ A DIAGNOSTIC TOOL TO IDENTIFY WORKPLACE OPPORTUNITIES

Gensler’s Workplace Performance Index (WPI) is a proprietary, web-enabled survey tool designed to measure the performance of an individual workplace or client portfolio. The tool is used for both pre- and post-occupancy analysis to allow for comparisons and to document improvements in workplace effectiveness. In the pre-phase, employee input on workplace performance factors is gathered at the beginning of a project in order to inform design decisions. In the post-phase, following project completion, employee input is gathered to measure the success of the design solution. By using a core set of parallel questions, individual projects can then be directly compared to the results of national surveys to put project work into a context of broader knowledge and trends in workplace design.

WPI surveys are conducted as a part of direct client engagements. The results of WPI surveys are collected in a separate database from Workplace Survey responses—the WPI database now has over 100,000 survey responses from employees of Gensler clients.

**The Growth of Gensler’s
WPI Respondent Database**
08/2007–07/2013



The WPI Report
After conducting a WPI, we provide a detailed report of findings based on a specific workplace. These results are also benchmarked against findings from our national workplace surveys to measure performance in relation to a national average or industry segment.



RESEARCH IN CONTEXT IMPLICATIONS FOR THE BUILT ENVIRONMENT

The workplace continues to be the place that companies, and employees, see as the primary location in which to support both individual and collaborative work. Our research supports this preference and shows that providing an optimal work environment is an opportunity to improve business performance, engage employees, and drive innovation and the productive spread of ideas. To effectively drive performance, these environments must continue to evolve along with changing work, life, and economic drivers to stay relevant and tailored to the needs of today's knowledge worker. Many of today's workplaces haven't kept pace, and those that have perform significantly better.

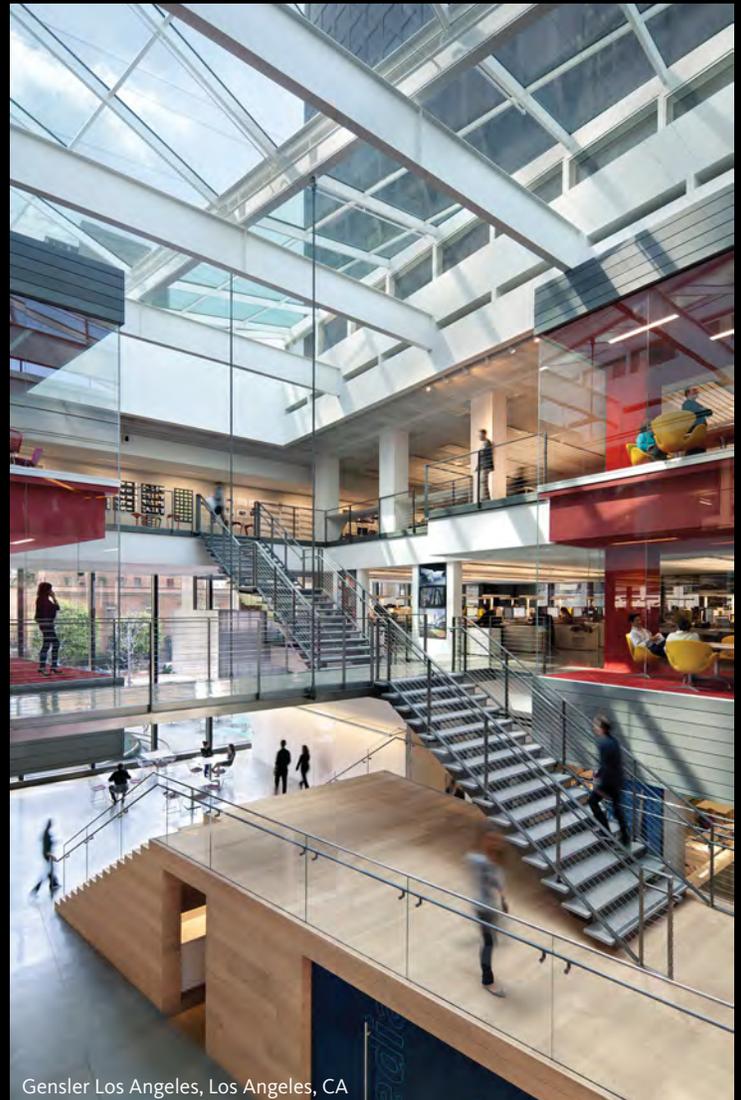
Importantly, the buildings and cities today's that workers increasingly call home must also evolve to stay relevant and offer the right mix of spaces, amenities, and support systems to keep pace with new

workplace strategies and needs. For new buildings, this may mean an expanding or evolving suite of amenities and performance strategies to meet the expectations and requirements of tomorrow's tenants. Existing buildings may pose even more interesting opportunities, as shifting demographics and aging building stock open opportunities to actively evolve yesterday's buildings to stay relevant and offer healthy, flexible, and high-performance workplace environments. The evolution or "hacking" of buildings to make this possible is a topic of continued exploration at Gensler, and will become ever more important as the country, and world, continue to migrate to cities, putting stress on aging infrastructure and increasing demand on urban space.

Case Study: Gensler Los Angeles

Gensler's Los Angeles office is an ideal case study for the active evolution of the built environment.

The firm selected a building designed in 1971 for a bank branch at City National Plaza that had sat vacant for nine years. The goal was to test new ideas and approaches to workplace strategy and design. Numerous sustainable and design strategies, from a new naturally ventilated and day-lit atrium to a suspended mezzanine floor that added much needed square footage, successfully turned an outdated structure into a dynamic, high-performance work environment. The result is not only great design but also improved performance as measured by Gensler's WPI.



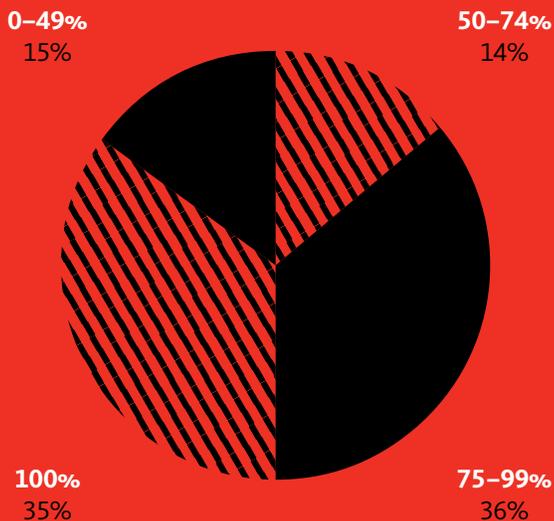
Gensler Los Angeles, Los Angeles, CA

METHODOLOGY

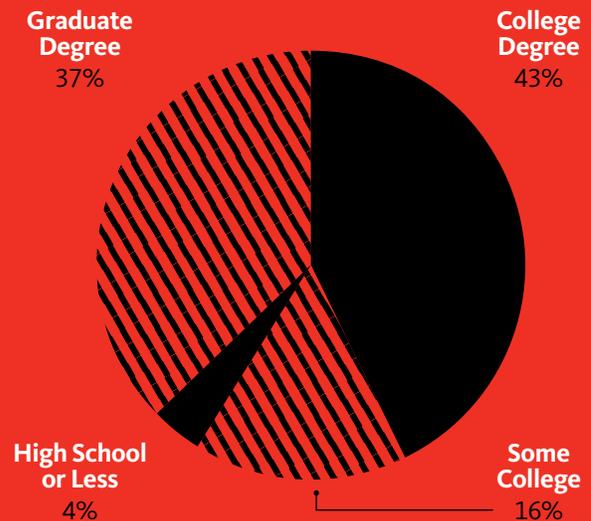
This survey represents data collected via an online survey conducted among a random sample of 2,035 respondents representing a broad cross section of demographics, including education, age, gender, and location. Respondents include knowledge workers who work in an office some or all of the time within 10 industry segments. Gensler retained The Futures Company to conduct the survey; Precision Consulting conducted statistical analysis. Survey questions include those from Gensler's WPI alongside additional questions that ask respondents to rank their workspaces and companies across a variety of factors including innovation, motivation, choice, and technology, as well as individual patterns of behavior and preferences.

OFFICE TIME

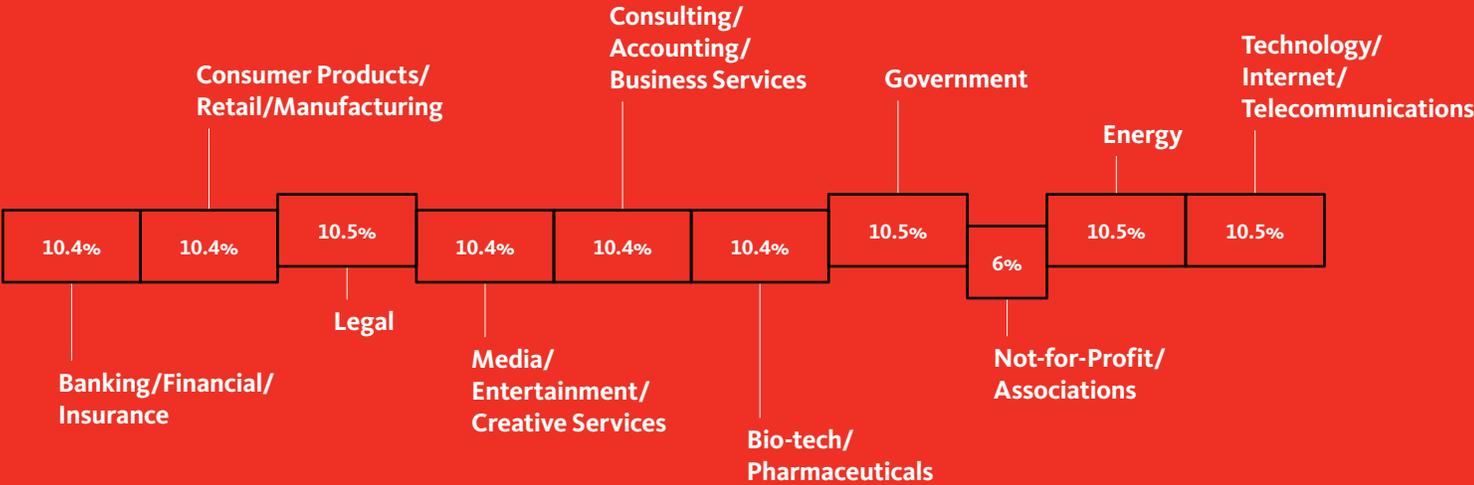
Percentage of time spent in office during an average work week.



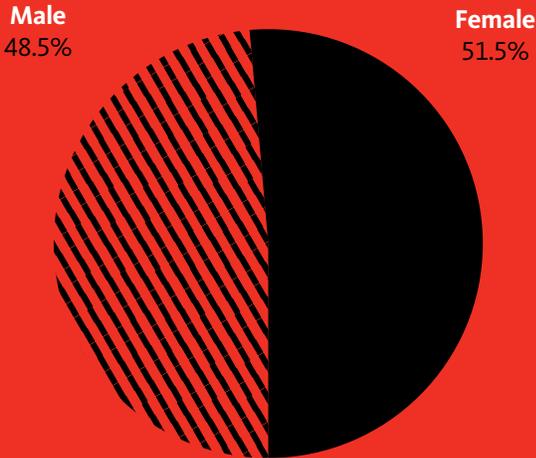
EDUCATION



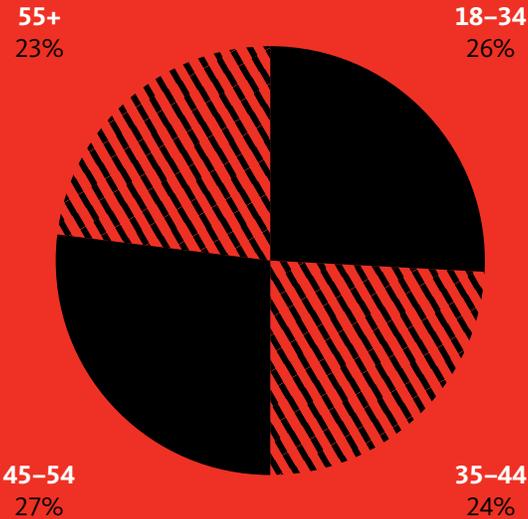
Survey data represents **2,035 respondents** with statistically significant samples from 10 industry sectors.



GENDER



AGE





ENDNOTES

1. Pew Internet Surveys 2006–2013, Pew Internet & American Life Project, <http://www.pewinternet.org/Static-Pages/Trend-Data-%28Adults%29/Device-Ownership.aspx> (May 2013).
2. Bureau of Labor Statistics, Labor Force Statistics from Current Population Survey, Ages 16+, <http://data.bls.gov/timeseries/LNS14000000> (Accessed June 27, 2013).
3. Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, World Population Prospects: The 2011 Revision, <http://esa.un.org/unpd/wup/CD-ROM/Urban-Rural-Population.htm> (Accessed June 27, 2013).
4. CoreNet Global, Global Benchmark Survey, <http://www.prnewswire.com/news-releases/office-space-per-worker-will-drop-to-100-square-feet-or-below-for-many-companies-within-five-years-according-to-new-research-from-corenet-global-140702483.html> (February 2012).
5. Alex “Sandy” Pentland, “The New Science of Building Great Teams,” (*Harvard Business Review*, April 2012).
6. Dan Pink, *Drive: The Surprising Truth About What Motivates Us*, (New York, NY: Riverhead Books, 2009), p. 89.



ABOUT GENSLER

As the leading design firm for business, Gensler has a unique perspective on the ways that people really work. Through projects with thousands of companies and our national workplace surveys, we have seen firsthand the revolution of knowledge work, and how individuals and teams create organizational value and drive performance.

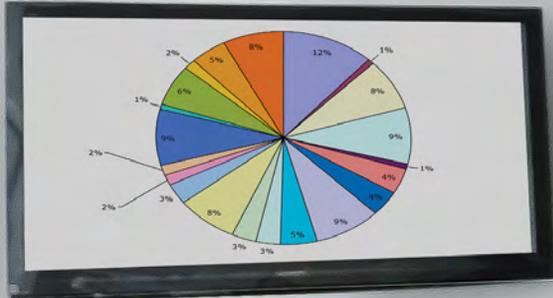
PHOTOGRAPHY

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Jasper Sanidad: page 16 (top right)

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