

2013 U.S. WORKPLACE SURVEY

Image: Ron Blunt

INDUSTRY FINDINGS:

ENERGY

- **Currently only a quarter (28%) of energy sector employees work in a top-performing workplace, defined as those that balance focus and collaboration.**
- **Primary assigned workspaces in the energy sector underperform for focus work.**
- **Providing choice of when and where to work is an opportunity to improve workplace and employee performance.**

The ever increasing global demand for energy is creating a boom in hydrocarbon exploration practices, a search for more viable alternative energy resources, and an emphasis on distribution technologies and networks within the energy industry. While safety remains the number one goal, drivers such as recruiting and retaining talent, knowledge transfer and technology innovation are top priorities for industry organizations, and significantly impact the approaches taken towards workplace environments and business strategies.

As an industry focused on innovation, individual and team contributions are both highly valued - continuing to support each is critical in a very competitive market.

WORKPLACE PERFORMANCE

Gensler's 2013 U.S. Workplace Survey establishes new performance goals to optimize the workplace in support of knowledge workers. This report outlines the current state of the energy sector workplace in light of our latest research findings.

Responses from energy sector workers reveal opportunities for improvement across all four work modes, as well as the opportunity to improve the performance of the workplace as a whole. As measured by Gensler's Workplace Performance Index™ (WPI), energy sector workplaces average a score of 64 on a 100-point scale. This is in line with the average of

respondents in all sectors and 10 points lower than those in top-performing workplaces. Individual, focused work dominates work time (54%), as it does for the vast majority of American workers. Collaboration is the second most frequent activity at 25% of the average week (Figure 1). Workers in top-performing, balanced environments report significantly higher effectiveness across all work modes (Figure 2).

EMPLOYEES IN TOP-PERFORMING WORKPLACES—THOSE THAT EFFECTIVELY BALANCE FOCUSED AND COLLABORATIVE WORK—OUT-PERFORM THEIR PEERS ON MEASURES OF PERFORMANCE AND INNOVATION.

Figure 1
Time Spent
Percentage of average work week.*

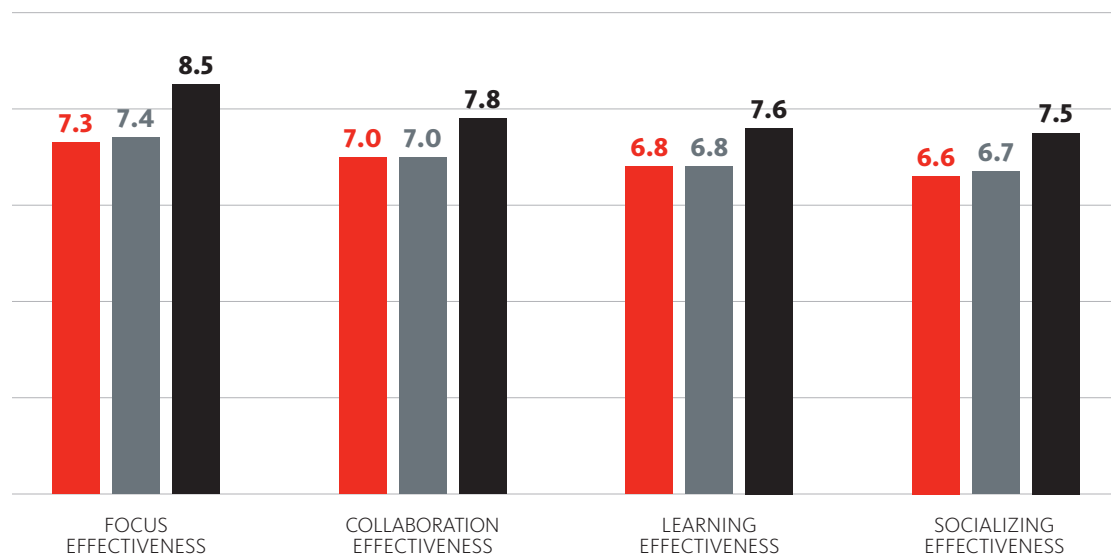
■ Energy
■ Average of all Industries
■ Top-Performing Workplaces

*Does not include time spent in secondary tasks such as printing, filing, copying, travel between meetings, or personal activities.

Work Mode	Energy	Average of all Industries	Top-Performing Workplaces
FOCUS	54%	54%	50%
COLLABORATE	25%	24%	26%
LEARN	6%	5%	6%
SOCIALIZE	7%	8%	8%

Figure 2
Workplace Performance Indicators
As ranked on a 10-point scale.

■ Energy
■ Average of all Industries
■ Top-Performing Workplaces



EMPLOYEE EXPERIENCE

Currently, less than one-third (28%) of workers in the energy sector are in top-performing work environments. The average energy worker has less choice regarding when and where to work than the average employee, and significantly less than those who report working in top-performing, balanced environments (Figure 3). Improving individual focus effectiveness is a critical driver of overall workplace effectiveness and offers a significant opportunity for energy companies to drive higher performance (Figure 4). Energy sector workers rank their job satisfaction, performance, and company innovation largely in line with the average American worker, though significantly lower than those in top-performing work environments (Figure 5).

Figure 3
Choice in When and Where to Work

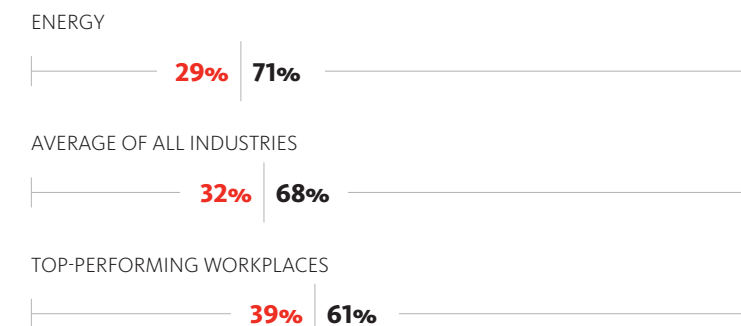


Figure 4
Focus Effectiveness Factors
As ranked on a 10-point scale.

■ Energy
■ Average of all Industries
■ Top-Performing Workplaces

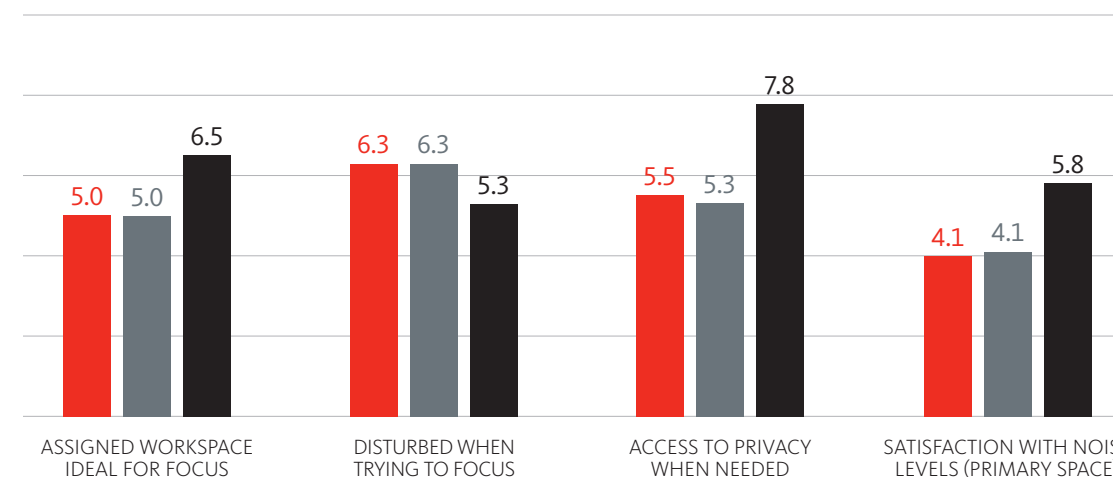
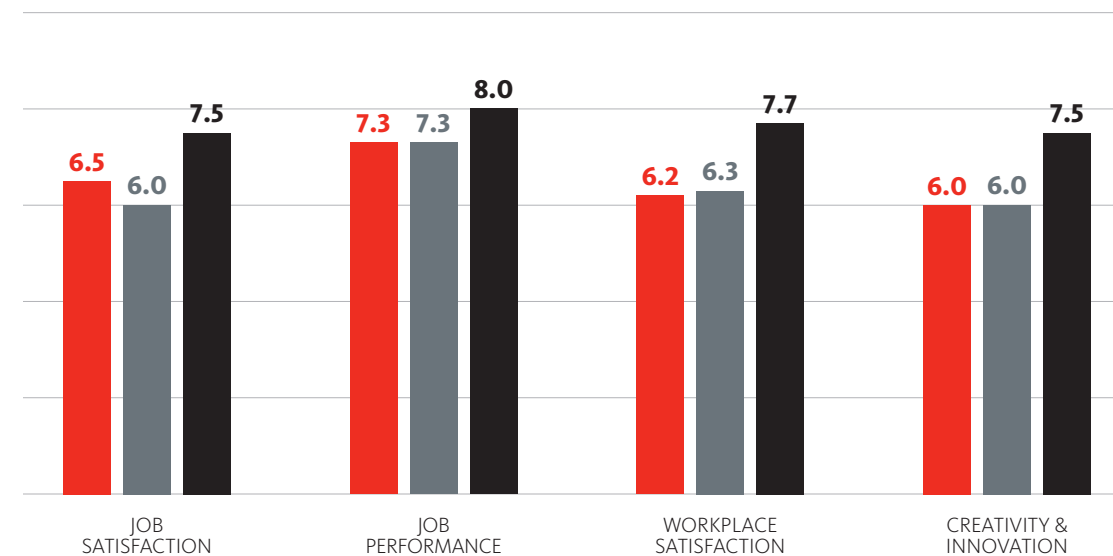


Figure 5
Employee Experience Indicators
As ranked on a 10-point scale.

■ Energy
■ Average of all Industries
■ Top-Performing Workplaces



HOW DO YOU COMPARE?

In the competitive energy market, having an effective workplace strategy is an imperative to effectively manage costs without sacrificing employee performance and innovation. Conducting a Gensler Workplace Performance Index™ (WPI) survey is an opportunity to understand how your workplace compares to peers in your industry and the top-performers identified in our study. Gensler's WPI database currently includes over 125,000 respondents from top corporations across the globe. Contact a Gensler industry expert to learn more about how we help clients drive business performance through workplace design.

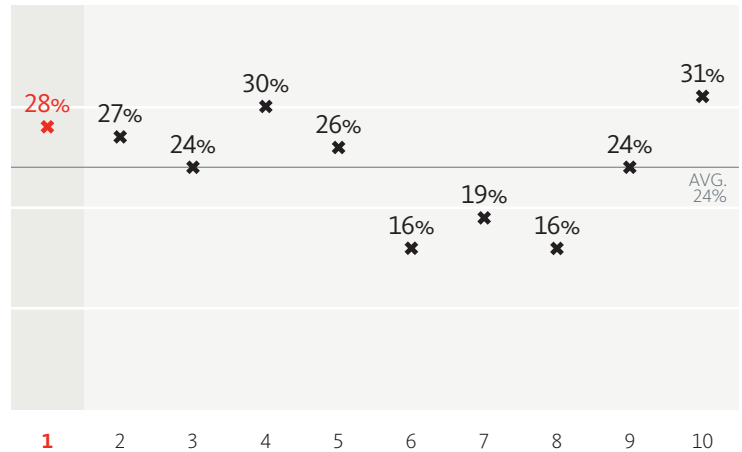
METHODOLOGY

See the 2013 U.S. Workplace Survey Key Findings report for full information on methodology and sample information, available at gensler.com/research. Energy sector respondents represent 10.5% of the overall survey sample, which includes 214 employees across the U.S.

Industry Comparisons

Percent of employees in top-performing work environments.

- | | |
|---|-------------------------------|
| 1 ENERGY | 6 GOVERNMENT |
| 2 BIO/PHARMA | 7 LEGAL (ATTORNEYS) |
| 3 CONSULTING/ACCOUNTING/
BUSINESS SERVICES | 8 MEDIA/ENTERTAINMENT |
| 4 CONSUMER PRODUCTS | 9 NOT-FOR-PROFIT/ASSOCIATIONS |
| 5 FINANCIAL SERVICES | 10 TECHNOLOGY/TELECOMM. |



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.

LOCATIONS

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|-----------|-------------|----------------|------------------|
| Abu Dhabi | Detroit | Morristown | São Paulo |
| Atlanta | Doha | New York | Seattle |
| Austin | Dubai | Newport Beach | Seoul |
| Baltimore | Hong Kong | Philadelphia | Shanghai |
| Bangalore | Houston | Phoenix | Singapore |
| Bangkok | La Crosse | Pittsburgh | Tampa |
| Beijing | Las Vegas | Raleigh-Durham | Tokyo |
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