

Gensler LATIN AMERICA WORKPLACE SURVEY 2017



Embracing a Culture of Collective Working

How well is the Latin American workplace supporting the region's knowledge workers, and what are the opportunities to improve?

WHAT WE DID

We surveyed an anonymous, panel-based sample of over 4,000 office workers across nine major cities in Latin America. As with Gensler's other Workplace Surveys, we gathered responses using our proprietary Workplace Performance Index® (WPISM) survey tool. Respondents represented all generations and seniority levels in the workplace, included companies of various sizes, and were geographically spread across the region. Our goal is to further develop our understanding of how and where people are working, and how well their

spaces support that work. We use this information to understand the differences (and similarities) between Latin American workers and others around the world; and to identify targeted strategies to improve workplace design and maximize employee and business performance in the region. Additional questions in the survey seek to measure the impact that workplace design has on culture and behavior, and the connection between design strategy and innovation.



CITIES SURVEYED

México City, México

San José, Costa Rica

Medellín and Bogotá, Colombia

Lima, Perú

Santiago, Chile

Rio de Janeiro and São Paulo, Brazil

Buenos Aires, Argentina

THE CONTEXT

Latin America is a mix of Spanish- and Portuguese-speaking countries with a rich cultural legacy. The food, music, and people who populate these dynamic countries and global cities—two of the 10 largest cities in the world are located in the region—bring deep influences that impact how, and where, work is done throughout the region.

Yet for many years, Latin American workplace strategies have been largely informed by information and research-based trends from other countries. As many global companies migrated to the region to expand their businesses or strategically transform their delivery models, their global standards often set a precedent for local workplace models. By gathering Latin America-specific data, we are able to compare local data to global workplace trends. This helps us understand what makes the region unique, learn of specific opportunities to improve the experience of Latin American workers,

and identify similarities or universal truths between workers across countries. These insights help paint a more nuanced picture of the Latin American worker and workplace.

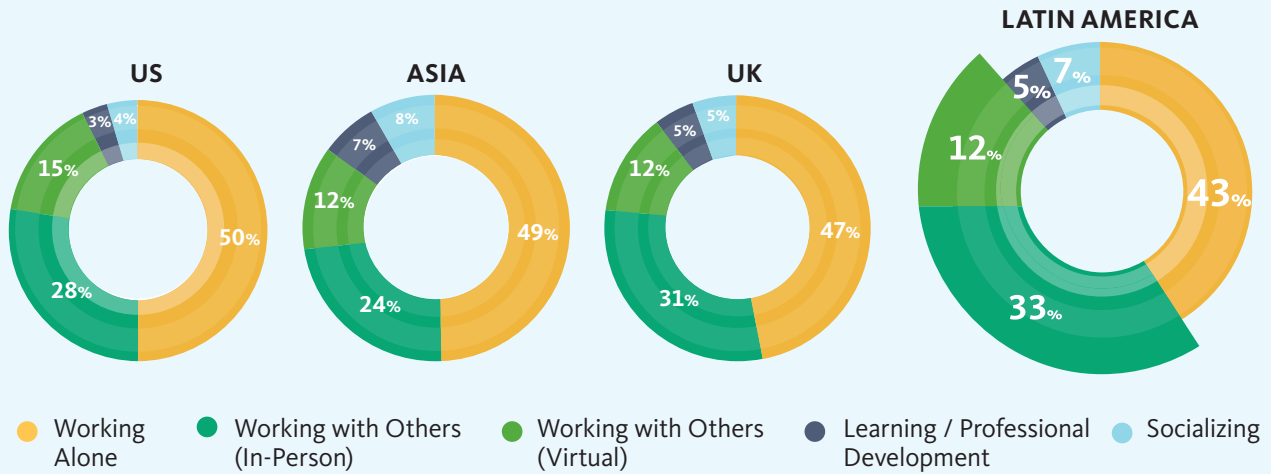
As the war for talent increases in the region, the focus of many organizations is to attract talent and innovate. These insights are of particular importance as the local culture still tends to resist more progressive or open office designs, even those offering a choice of complementary workspaces that are often well received and desired by workers around the world. To find success, Latin American companies must find new workplace models that can help them achieve business success.

Latin American workers and organizations must search for a culturally relevant working environment that embraces global trends while adapting to the local lifestyle.



THE RESULTS

Latin Americans work with others more than they work alone.



Typically known for their social nature, Latin American workers are very effective when working together—and it shows in how they spend their time. Compared to the other global regions surveyed in 2016 (US, UK, and Asia), **Latin American workers report spending the least time working alone** (43 percent of an average

workweek), and the most time working with others (45 percent, combining both in-person and virtual collaboration). They also report socializing more than US and UK workers, a behavior that in the highly social Latin American culture may be hard to differentiate from working with others.

Collaborative technology is a key innovation driver.



A common theme among all 11,000+ workers surveyed across the globe in Gensler’s 2016 Workplace Surveys is the power of workplace design, the importance of seeing meaning in one’s work, and the value that at-work relationships bring. These factors were key drivers of performance and innovation across all our surveys.

For Latin American workers, an additional driver also proved crucial: the quality of collaborative technology.

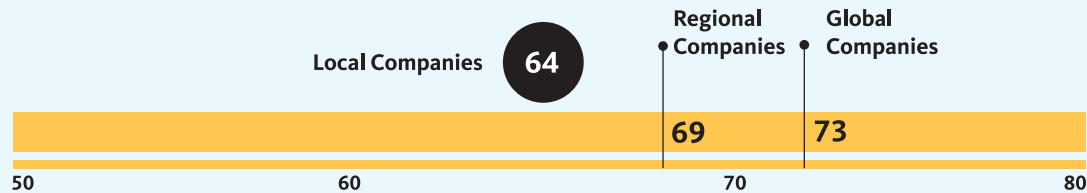
Having technology that supports collaborative work, both for meeting spaces (technology to support group work) and individual workspace (Integrated technology and connectivity), has a distinct effect on the level of innovation employees ascribe to their companies.

Companies that provide employees with the right technology to support their work with others, and in a variety of spaces around the office, have a key opportunity to differentiate from the market. The behaviors and characteristics of the most innovative employees illustrate the point—the most innovative employees have better collaboration spaces and greater access to technology. There is a clear opportunity to provide collaborative technology to a wider group in Latin American organizations today. In particular, those in non-management roles need greater support—leadership and management groups report greater access (92 percent) compared to employees (71 percent access).

Local companies have an opportunity to improve.

Given the importance of a workplace environment that recognizes culture, meaning, and relationships, one might expect locally or regionally based companies to have higher performing workplaces. Global companies, however, are currently scoring higher on workplace effectiveness and innovation scores as compared to their local peers. In particular, they appear to be

providing better-designed spaces (as measured by Gensler's Workplace Performance Index®) and investing more in technology to support collaboration. Global companies are also scoring higher on measures of job satisfaction and choice than their local/regional peers, and employees are more likely to report their workplace is effectively balancing collaboration and focus work.



WHAT THIS MEANS

Increased, and more effective, collaboration continues to be exhibited by the most innovative companies around the world—and Latin American workers are some of the best at it. High-performance workplaces support this preference to work in teams, while also employing targeted strategies to ensure that individual, focused work has a place in the office too.

Provide places to work alone, together.

While employees in the region love to work together, our data also shows they love to work from home. While only a minority of their time is spent working from home, it has some of the highest effectiveness ratings. This speaks to the challenge of doing focused work in a vibrant office where everyone is collaborating. Companies must provide ample places that support individual work, while offering the flexible spaces for employees to come together.

Leverage global workplace trends to stay competitive.

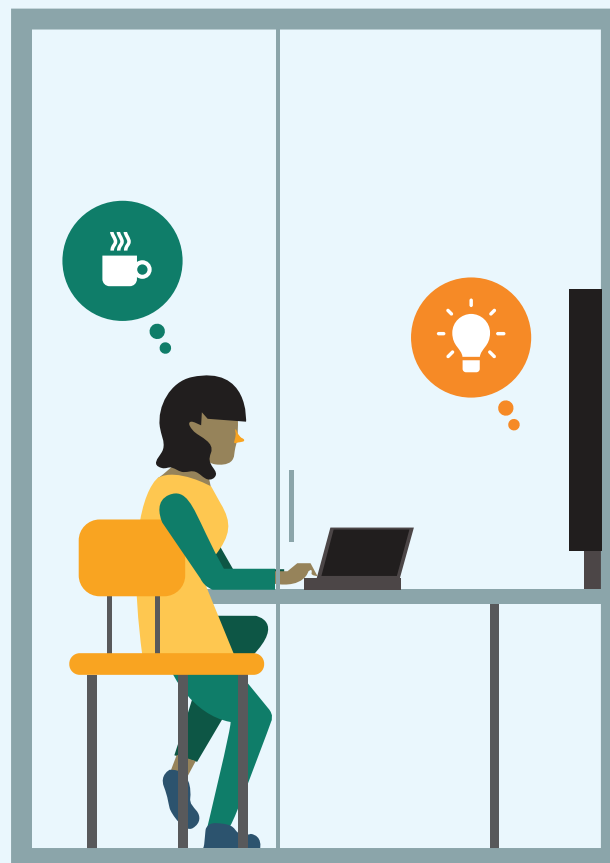
Global companies are currently setting the pace at which the workplace is changing. Regional and local companies have much to learn when it comes to space planning and technology. Given the importance of meaning and relationships to the employee experience, local companies should have a leg up on their global competitors if they are able to provide a physical environment that not only provides the right mix of spaces, but also reflects local culture and values.

Technology investments set innovators apart from the rest.

Overall, technology and tools in Latin America are under-supported. But the region is also poised to get the most benefit out of greater technology investment and use. Companies should acknowledge the inherently social behavior of their workers and support it through workplace design and policy.

WHAT'S NEXT

Understanding the work behaviors and environments at the national and regional level is a first step to identifying opportunities to improve the Latin American workplace. To drive more targeted conversations, these insights should be considered in light of the specific needs and work processes of individual organizations and work groups. By working directly with our clients in this manner, we can find the best solutions to the challenges and opportunities they face.



Team

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As architects, designers, planners, and consultants, we partner with our clients on some 3,000 projects every year. These projects can be as small as a wine label or as large as a new urban district. With more than 5,000 professionals networked across 46 locations, we serve our clients as trusted advisors, combining localized expertise with global perspective wherever new opportunities arise. Our work reflects an enduring commitment to sustainability and the belief that design is one of the most powerful strategic tools for securing lasting competitive advantage.

Gensler's Research Program supports research investigations important to our firm, our clients, and to the ongoing learning and development of Gensler professionals. Research projects are practitioner-led with involvement across the globe. Our teams bring thought leadership to the table as we seek to solve our clients' and the world's most pressing challenges by creating high-performance solutions that embrace the business and world context in which we work, enhance the human experience, and deliver game-changing innovation.

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