THE FUTURE OF WORK
Creating a Great Experience to Optimize Performance
73,000,000
company performance.

We discovered that the effectiveness and support of the four “work modes,” focus, collaborate, learn, and socialize. We found that these work modes connect to employee engagement and have a positive effect on the workplace, which began in 2005 with Gensler's first workplace survey. A subsequent survey in 2006 established key drivers of satisfaction, key drivers of performance, and innovation. Four work modes—focus, collaborate, learn, and socialize—emerge as the framework through which to understand time at the workplace.

What we've learned about the link between the physical work environment and personal and life shifts over that time period and points to solutions to realign today's workplace with today's world. The key to creating a culture of innovation is to effectively support each one. Companies value work modes more highly and have spaces that more effectively support each one.

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 Workplaces Performance Index (WPI) database.

Analysis of Gensler's Workplace Surveys have been conducted since 2005, and the most recent iteration is Gensler's 2013 U.S. Workplace Survey. Gensler's 2013 survey is the latest iteration of ongoing research that continues this thread of investigating the link between workplace design, employee productivity, and business competitiveness.
Efficiency vs. Effectiveness

Typewriter
Desktop
Laptop
Cloud

?
PEOPLE NEED AN EFFECTIVE PLACE TO WORK
BALANCE AND CHOICE DRIVE THE MOST EFFECTIVE WORKPLACES
BUT TO EXCEL, PEOPLE WANT A GREAT EXPERIENCE
A PLACE YOU HAVE TO GO

Tech-Focused
Efficiency
Effectiveness

A PLACE YOU WANT TO BE

People-Centric
Experience
Engagement
EQ
We Asked

6,000 U.S. WORKERS
People Want To

FOCUS + COLLABORATE

Marriott Headquarters, Maryland
People Want

**DEGREES OF OPENNESS**

- **TOTALLY OPEN**
  - No walls—everyone in the organization sits together.
  - 7% Ideal
  - 11% Current

- **MOSTLY OPEN**
  - With on-demand private space; offices only when required by role.
  - 26% Ideal
  - 28% Current

- **SOMewhat OPEN**
  - Few in private offices; desks with low/medium panels for privacy.
  - 20% Ideal
  - 20% Current

- **SHARED OFFICES**
  - Mostly shared offices/team rooms that sit 3-6 people.
  - 6% Ideal
  - 23% Current

- **MOSTLY PRIVATE**
  - Individual offices for most; the rest have medium/high panels.
  - 8% Ideal
  - 20% Current

- **TOTALLY PRIVATE**
  - An enclosed, individual work environment for everyone.
  - 28% Ideal
  - 16% Current

**TOTAL OPEN**

- No walls—everyone in the organization sits together.
- 7% Ideal
- 11% Current
People Want

WORK-FOCUSED AMENITIES

Capital One, Virginia
Amenities that Deliver the Highest Effectiveness & Experience

**EFFECTIVENESS**

<table>
<thead>
<tr>
<th>Amenities</th>
<th>EFFECTIVENESS (WPI) Value</th>
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<tbody>
<tr>
<td>INNOVATION HUB</td>
<td>Have It: +11</td>
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<tr>
<td>MAKER SPACE</td>
<td>Have It: +11</td>
</tr>
<tr>
<td>QUIET/TECH-FREE ZONE</td>
<td>Have It: +10</td>
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<tr>
<td>OUTDOOR WORKSPACES</td>
<td>Have It: +9</td>
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<tr>
<td>FOCUS ROOMS</td>
<td>Have It: +9</td>
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<tr>
<td>WORK CAFE</td>
<td>Have It: +8</td>
</tr>
<tr>
<td>CAFETERIA</td>
<td>Have It: +4</td>
</tr>
<tr>
<td>BREAK ROOM/LOUNGES</td>
<td>Have It: +1</td>
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</table>

**EXPERIENCE**

<table>
<thead>
<tr>
<th>Amenities</th>
<th>EXPERIENCE (EXI) Value</th>
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</thead>
<tbody>
<tr>
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<tr>
<td>MAKER SPACE</td>
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<td>CAFETERIA</td>
<td>+6</td>
</tr>
<tr>
<td>BREAK ROOM/LOUNGES</td>
<td>+2</td>
</tr>
</tbody>
</table>
People Want COWORKING

14% OF EMPLOYEES AT LARGE COMPANIES USE COWORKING SPACES REGULARLY

HanaHaus, California
Time Spent Coworking

Percent of average week spent in coworking spaces by percent of respondents.

- Less than 4 hours: 24%
- 4-8 hours: 39%
- 8-12 hours: 23%
- 12-16 hours: 6%
- 16-20 hours: 3%
- 20-24 hours: 2%
- 24-28 hours: 0.8%
- 28-32 hours: 0.3%
- 32-36 hours: 0.3%
- 36 hours+: 1.6%

1 Day/Week Working from Coworking Space

Percent of Average Work Week: Percent of average week spent in coworking spaces by percent of respondents.
People Want
PURPOSE

Nestlé USA, Virginia
THE FUTURE OF WORK TODAY
SPACE BEHAVIORS CONNECT CULTURE
Innovation Hub, Japan
Great work experiences lead to **BETTER BUSINESS PERFORMANCE**

Gallup's “State of the American Workplace”

- **21%** Higher Profit
- **41%** Lower Absenteeism
- **10%** Higher Customer Loyalty
INSIDE-OUT APPROACH
From the Workplace to the Building
THE GOLD STANDARD FOR OFFICE BUILDINGS HAS SHIFTED
**PAST**

- 20–25k SF floor plates
- 250–350 SF/person
- 8-9’ foot ceiling height
- Stacked office floors w/ no interconnection
- Center core
- Dispersed tenant provided amenities
- CBD or suburban

**PRESENT**

- Up to 60k SF floor plates
- 150-250 SF/person
- 9-12’ ceiling height
- Interconnecting Stairs
- Offset core
- Ample building amenities
- Community-based locations
Existing Exterior Enclosure

The existing enclosed shopping center is internally focused. Large floor plates, interconnecting bridges, and exposed circulation enhance connectivity but the building turns its back on the surrounding context.

To better interface with the city, the existing opaque building facade is removed and replaced with floor to ceiling window wall, exterior circulation, and balconies.
CREATING A GREAT EXPERIENCE TO OPTIMIZE PERFORMANCE
JANET POGUE MCLAURIN
Global Workplace Sector Leader, Gensler

DAWN STRIFF
Head of Workplace Solutions, Nestlé USA

STACEY COHEN
Senior Director of Corporate Facilities, Services & Real Estate, Marriott

JEFF BARBER
Firmwide Design Experience Leader, Gensler
DAWN STRIFF
Head of Workplace Solutions, Nestlé USA
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Creating a Great Experience to Optimize Performance
THANK YOU!