



Professional Services Industry North America

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 in the professional services industry segment for North America (US and Canada).

For this study, the professional services industry segment includes: Legal, Accounting, Consulting, Engineering, and Architecture.

Workplace Trends

FINDINGS—REAL ESTATE

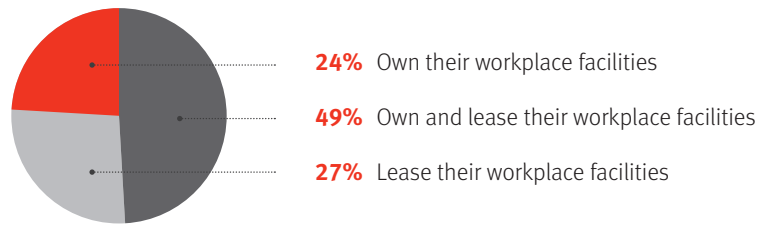
Top Change Drivers

1. Growth
2. Cost effectiveness

Change Management Program Activities Primarily Used

1. On-site IT support
2. On-site small group meetings
3. Website support

Owning/Leasing Workplace Facilities



FINDINGS—SUSTAINABILITY

Sustainable Design Goals

The top three goals selected by respondents were:

1. Reduction of energy use
2. Employee involvement/awareness
3. Materials use reduction/recycling

Furniture Disposal

Workplace practices with respect to furniture disposal:

1. Leave behind/donate
2. Buy-back program from manufacturer/dealer or sell to the environmental company

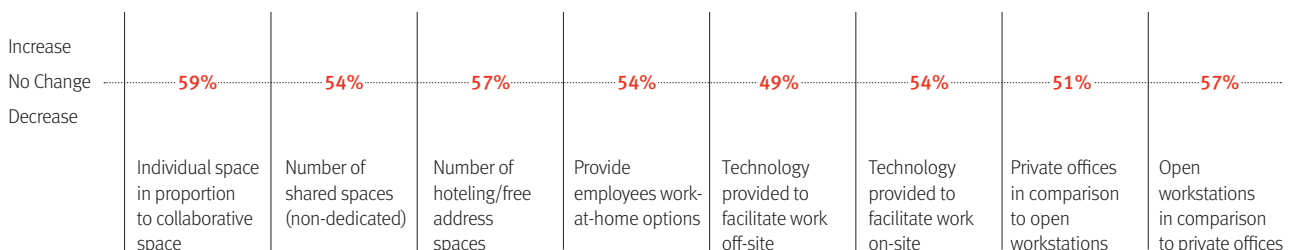
FINDINGS—PLANNING AND DESIGN

Anticipated Workplace Design Considerations by 2015

When thinking about the design of workplaces, the **design considerations considered most important** by facility managers were:

- Accommodating teaming, collaboration, and other new forms of group work
- Making it easy for people to work in many different settings through wireless technology
- Designing individual offices/open plan workstations for multiple monitors

Anticipated Facility Space Use Changes by 2015



Workplace Trends

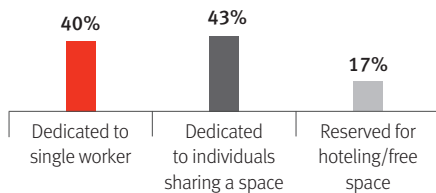
Purchases Covered by Standards/Guidelines Programs

Standards and guidelines programs are **most prevalent** for **work tools** and **open plan workstations**.

1. Work tools (51%)
2. Open plan workstations (49%)
3. Storage (43%)
4. Seating (35%)

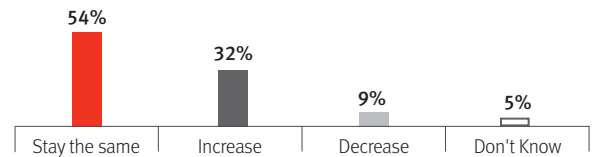
Shared and Dedicated Workstations by 2015

Facility managers anticipate that the majority of open plan workstations will be dedicated to individuals sharing a space.

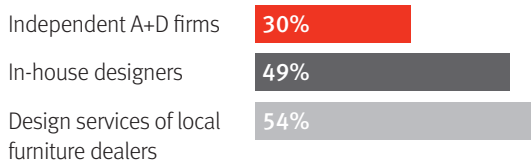


Percentage of Space Dedicated to Collaboration by 2015

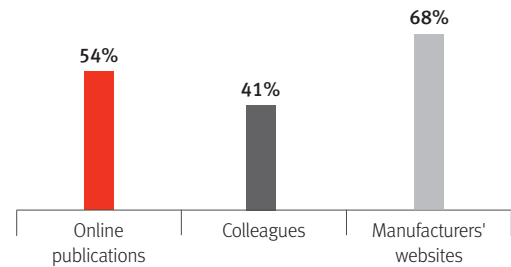
The majority of facility managers believe the percentage of space dedicated to collaboration will stay the same by 2015.



Resources Used for the Design of New Workplaces and Major Renovations



Source of Information and Innovative Workplace Ideas



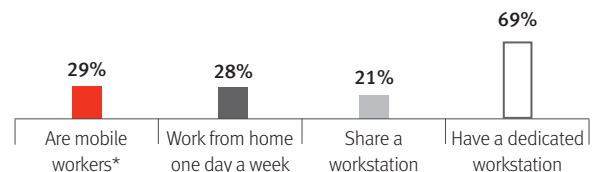
FINDINGS—MOBILITY

Actively Supported Work Arrangements

1. Working from home (59%)
2. Working from remote workplaces owned/leased by the company (54%)
3. Working from places like telework centers, café areas, coffee shops, etc. (46%)

Percentages for Employee Work Arrangements

Most employees have a dedicated workstation or are mobile workers.

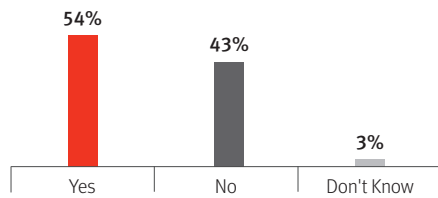


*Mobile workers spend no more than 50% of time in the workplace

FINDINGS—GENERATIONS

When Designing Workplaces

54% of facility managers said they use design to address multiple generations in the workplace.



Generational Considerations in the Workplace

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

1. Flexible workspace layout
2. Open plan workstation personalization
3. The ability to work anywhere inside or outside the facility

FINDINGS—TECHNOLOGY

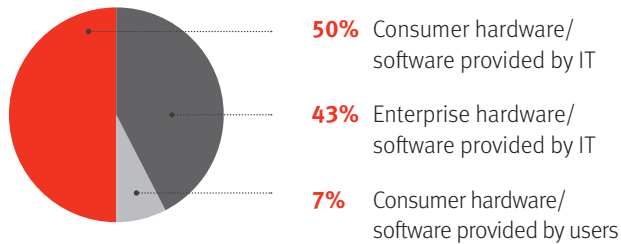
Impact of Technology on Individual Work

65% of facility managers indicated technology is having a **high to transformative** impact on the ways people work **individually**.

Impact of Technology on Group Work

67% of facility managers indicated technology is having a **high to transformative** impact on the ways people work in **groups**.

Hardware and Software Technology Impact



Wi-Fi Availability in the Workplace

As compared to other major industries, **100%** of professional services respondents indicate there is Wi-Fi availability in the workplace.