

Gensler

2013 U.S. WORKPLACE SURVEY

Image: Jasper Sanidad

INDUSTRY FINDINGS: TECHNOLOGY

- **Currently only one-third (31%) of tech employees work in a top-performing workplace, defined as those that balance focus and collaboration.**
- **As tech companies compete for top talent, work environments that are highly effective and amenity rich are of key importance.**
- **Despite being a key factor in workplace effectiveness, only 41% of tech sector employees report the ability to choose when and where to work.**

The technology sector represents a highly diverse set of companies - large and small, private-owned and publicly held, from start-ups to industry legends. The fast-growing industry is also in a constant state of evolution as companies grow and change at an extremely rapid pace.

Despite the diversity that defines the industry, tech companies share a common, critical issue: the need to attract and retain top talent in order to maintain a competitive edge in the marketplace. This has placed the tech workplace environment center stage as a point of differentiation as well as a key enabler of innovation.

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 tech industry workplace (which includes respondents from technology, internet and telecommunications companies) in light of our latest research findings.

Responses from tech 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),

tech workplaces post an average score of 65 on a 100-point scale. This is in line with the average of respondents in all sectors, but nine points below those in top-performing workplaces.

Individual, focused work dominates work time (53%), as it does for the vast majority of American workers. Collaboration is the second most frequent activity at 27% 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.*

■ Technology
■ 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.

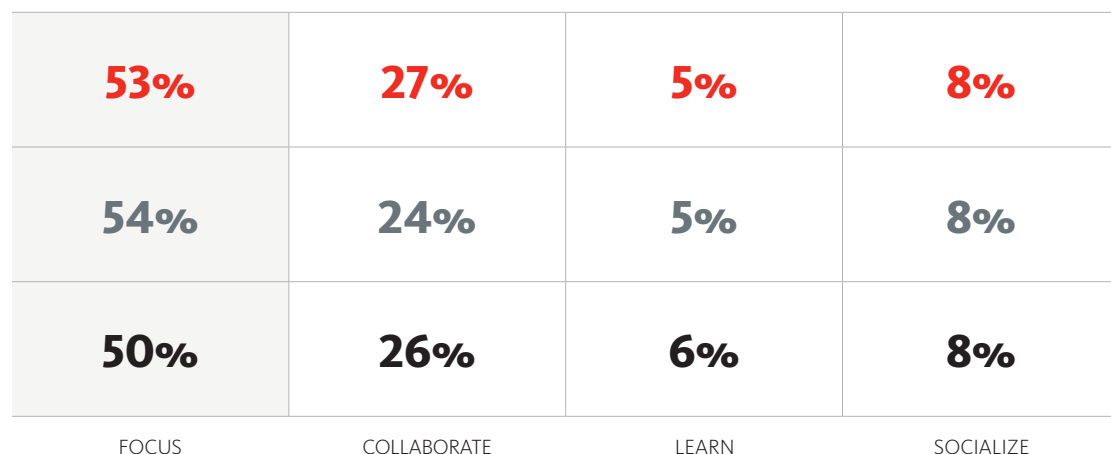
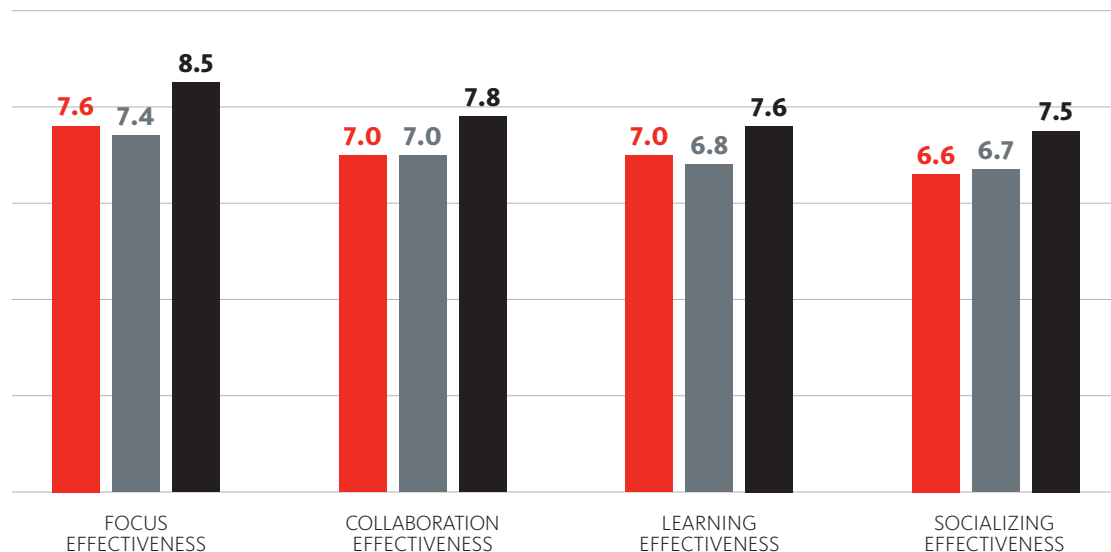


Figure 2
Workplace Performance Indicators
As ranked on a 10-point scale.

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



EMPLOYEE EXPERIENCE

With a virtual “war for talent” taking place every day, tech companies are going to great lengths to enhance the employee experience and attract, retain and nurture fresh talent. In addition to providing services and amenities for all workers, tech companies are especially mindful of the need to provide spaces that support the focus work of engineers, the brain trust that allows the industry to continually improve and innovate. They are no more able to find privacy when needed and are just as dissatisfied with noise levels as the average U.S. worker (Figure 4).

The challenge for the sector is to balance the individual engineer's need for places to focus with the need of teams to access each other and work collaboratively. Both tasks are equally important to getting the product out the door and achieving that balance is an opportunity to improve satisfaction and innovation (Figure 5).

Figure 3
Choice in When and Where to Work

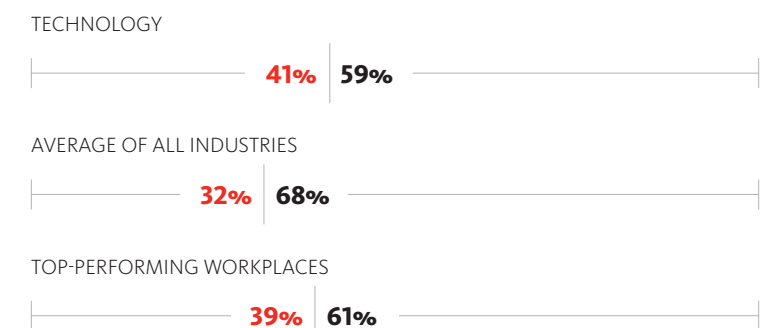


Figure 4
Employee Support Factors
As ranked on a 10-point scale.

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

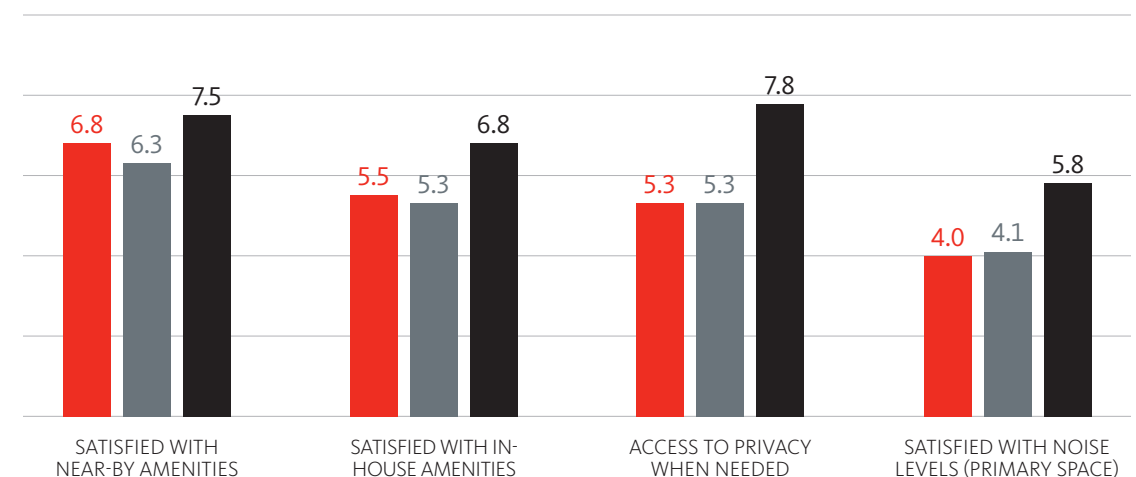
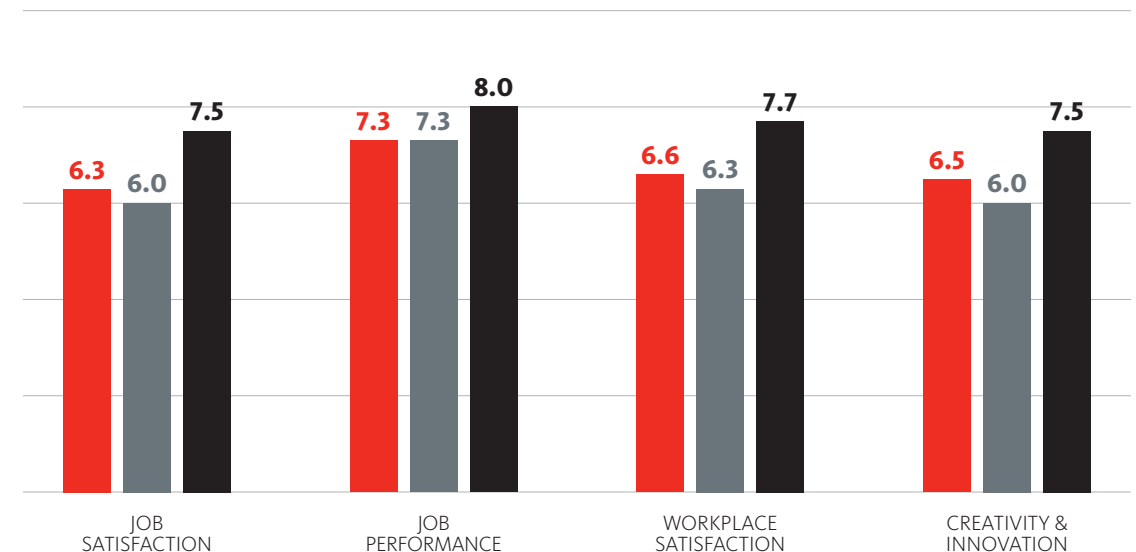


Figure 5
Employee Experience Indicators
As ranked on a 10-point scale.

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



HOW DO YOU COMPARE?

In the highly competitive technology industry, having an effective workplace strategy is an imperative to attract top talent and support the pursuit of 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 companies around the globe. Contact a Gensler industry expert to learn more about how we help clients drive business performance through workplace design.

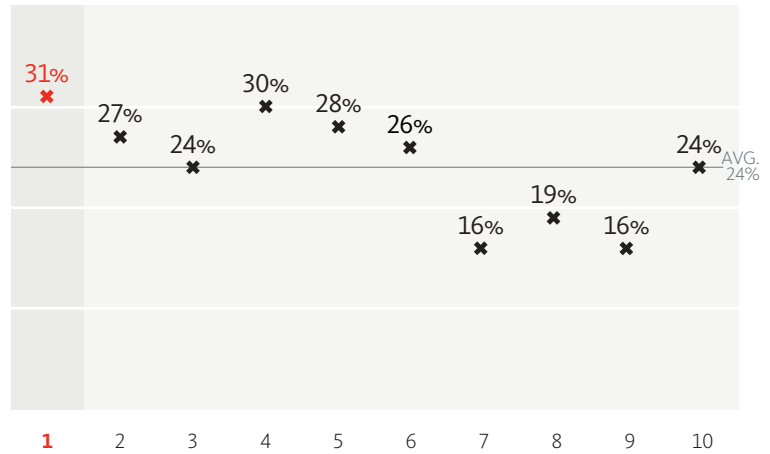
METHODOLOGY

See the 2013 U.S. Workplace Survey Key Findings report for full information on methodology and sample information, available at gensler.com/research. Technology/Internet/Telecommunications 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 TECHNOLOGY | 6 FINANCIAL SERVICES |
| 2 BIO/PHARMA | 7 GOVERNMENT |
| 3 CONSULTING/ACCOUNTING/
BUSINESS SERVICES | 8 LEGAL (ATTORNEYS) |
| 4 CONSUMER PRODUCTS | 9 MEDIA/ENTERTAINMENT |
| 5 ENERGY | 10 NOT-FOR-PROFIT/ASSOCIATIONS |



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

- | | | | |
|-----------|-------------|----------------|------------------|
| 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 |
| Boston | London | San Diego | Toronto |
| Charlotte | Los Angeles | San Francisco | Washington, D.C. |
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