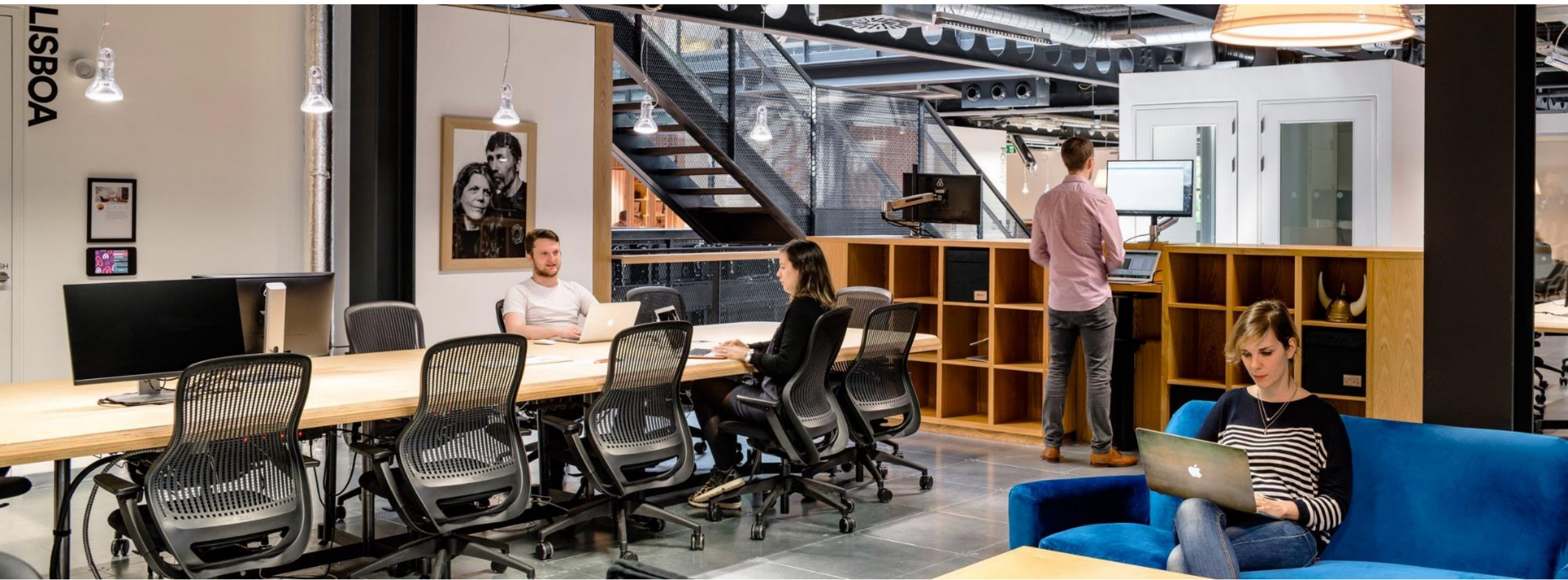




The Evolving Workplace

Changing Dynamics of Work and the Workplace



Airbnb, Dublin

Knoll

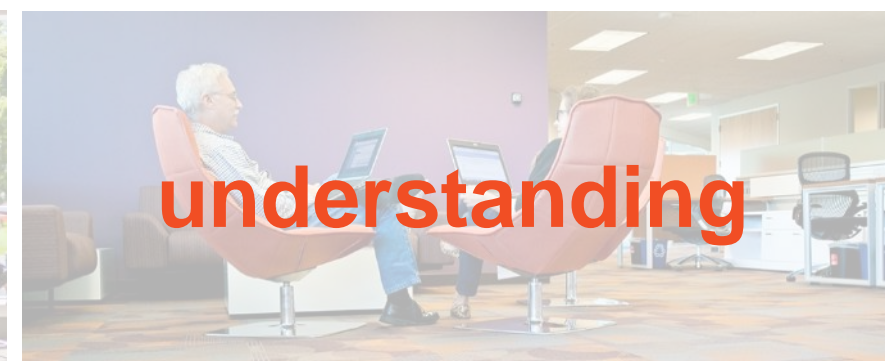




Why workplace matters.



It's About People





The Workplace is Key to Workers

Top Job Likes

1. Great co-workers
- 2. Work environment**
3. Good benefits

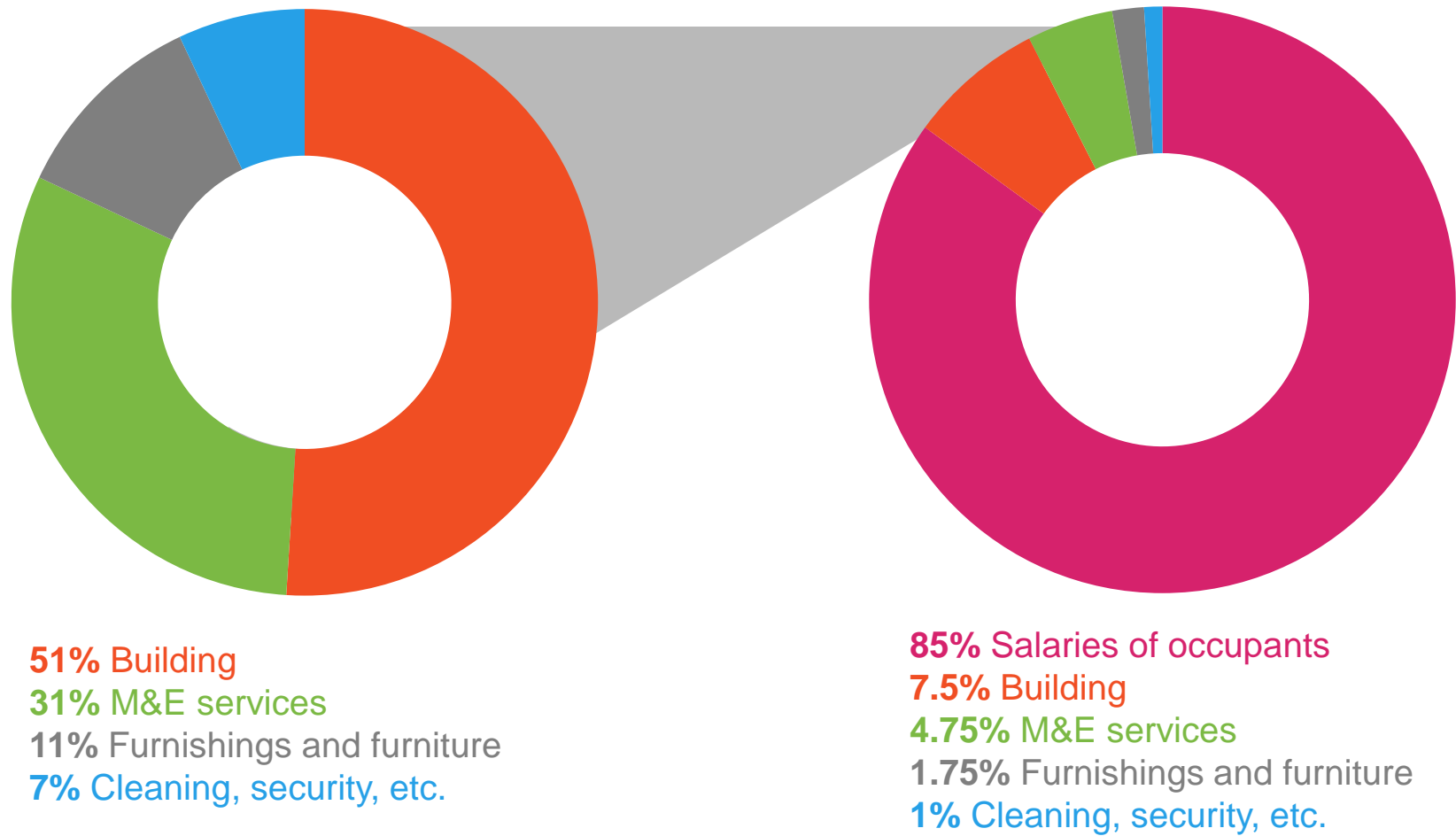


Top Job Gripes

1. Annoying co-workers
2. Poor work-life balance
- 3. Poor work environment**



Workplace Costs are Dwarfed by Investments in People



Based on 25-year cost of developing, owning and operating an office building

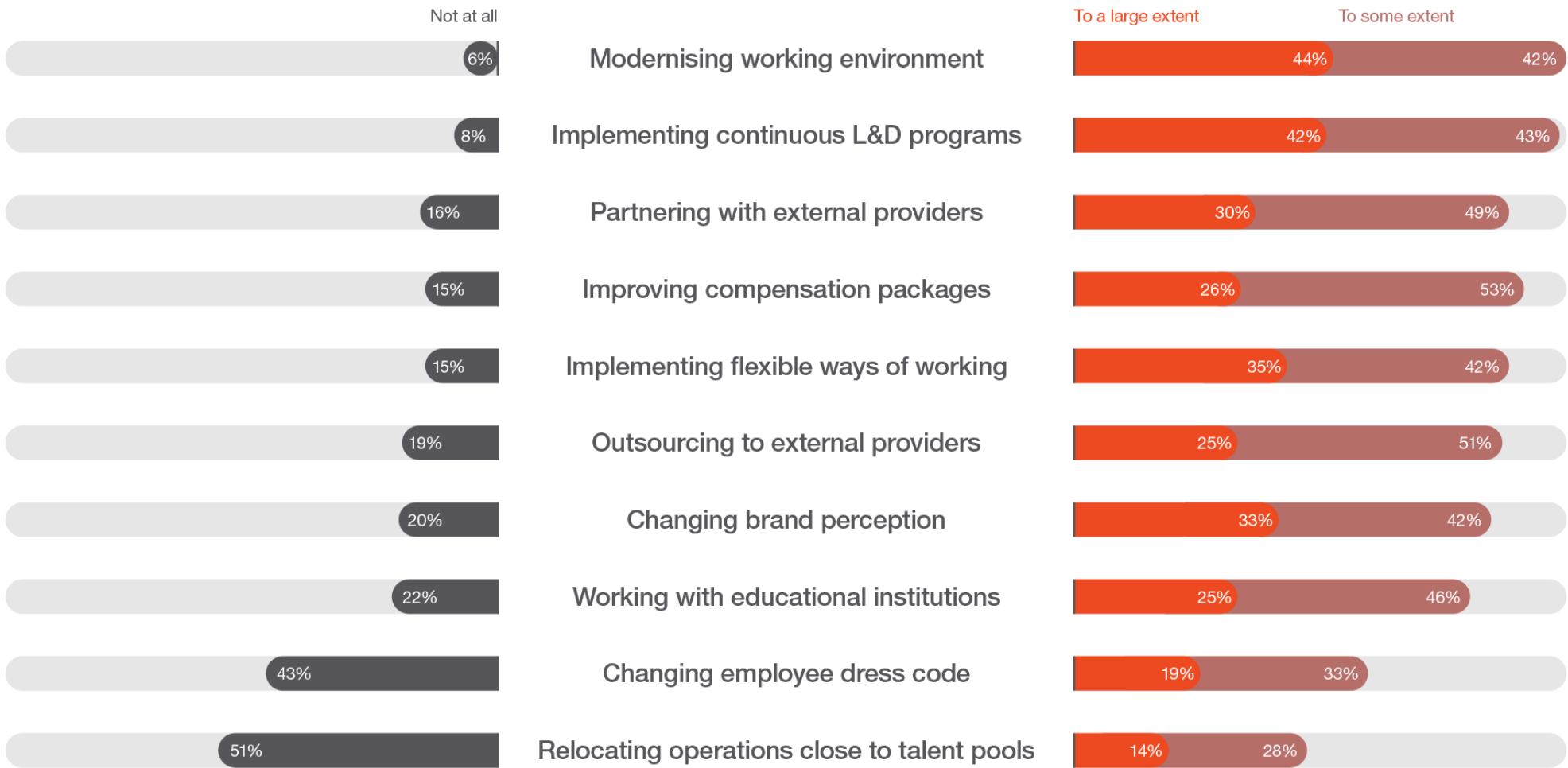


Today's Workers Want an Engaging Workplace





Workplace Tops the List of Ways to Attract Talent





An evolution is underway.



Five trends influencing work:

- 1 **Talent shortages**
- 2 **Changing demographics**
- 3 **Growing contingent workforce**
- 4 **Demand for alternative and flexible work arrangements**
- 5 **Shifting employee expectations**



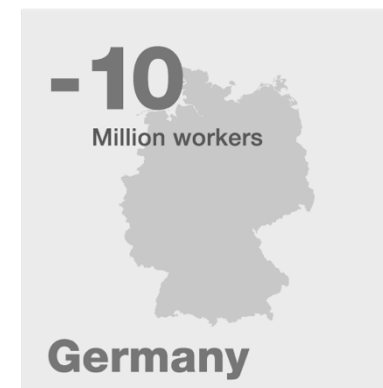
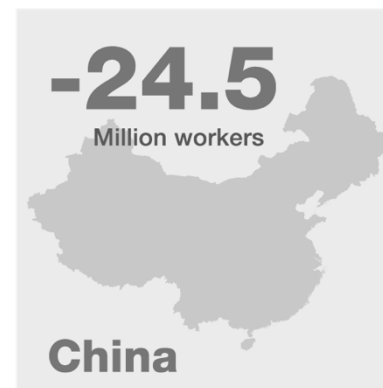
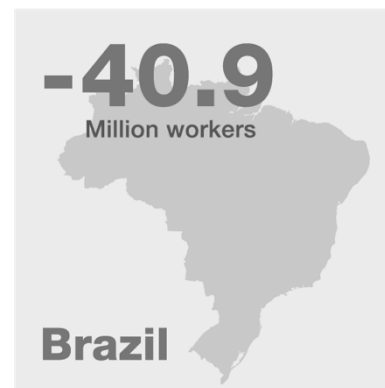


There is a Global Workforce Crisis

2020

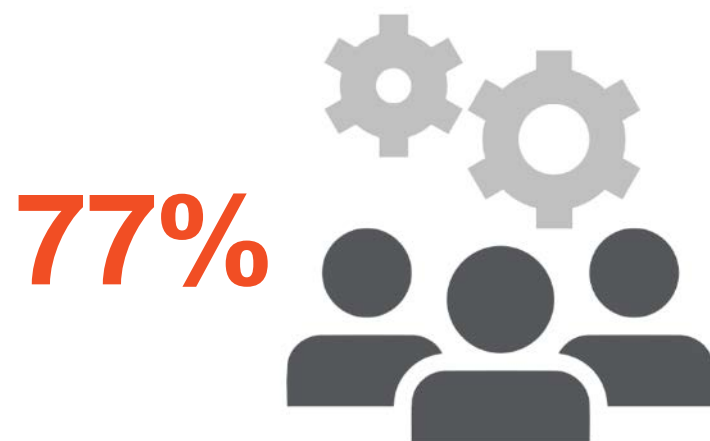


2030





Companies Worry About Finding, Hiring and Keeping Talent



of CEOs see the
availability of key skills
as the biggest threat to
their business.

3.56
million



American workers
quit their jobs
in May; the fastest rate
since 2001.

It's an 'Employee Market'



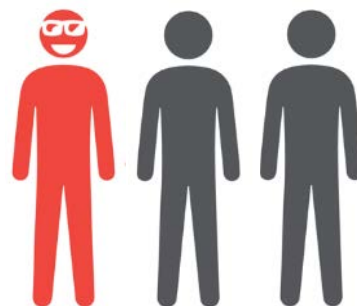
Shift in the “Three G’s”: Gender, Generation and Geography

Nearly
6 in 10



students on campuses are
women.

More than
6 in 10



workers are
millennials.

Almost
8 in 10



projects are completed
with at least one individual
working from a
different location.



Who Needs a Corner Office When You Have Flexibility?

The Independent Workforce is on the rise





Employees Desire More Control Over When and How They Work

54%



Office workers who say
they would leave their job for
one that offers
flexible work time.

41%



Employees would switch
jobs to have
a personal workspace.

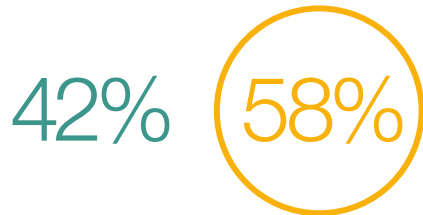
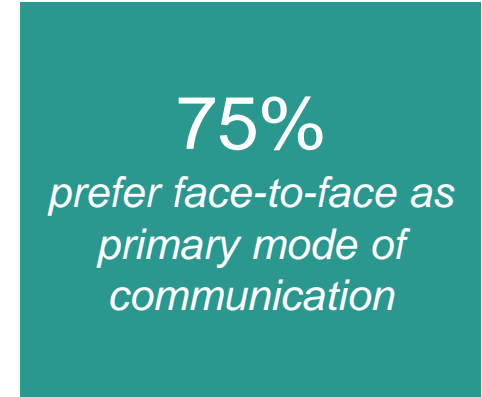
Students say a company's technology affects their professional path



A company's technology services and solutions would factor into my decision to accept a job



Working for a company with updated, state-of-the-art technology services and solutions is important to me and my future work



The design (look, feel and function) of my future workplace is important to me



The design (look, feel and function) of my future workplace will impact my overall well-being (physical and mental)

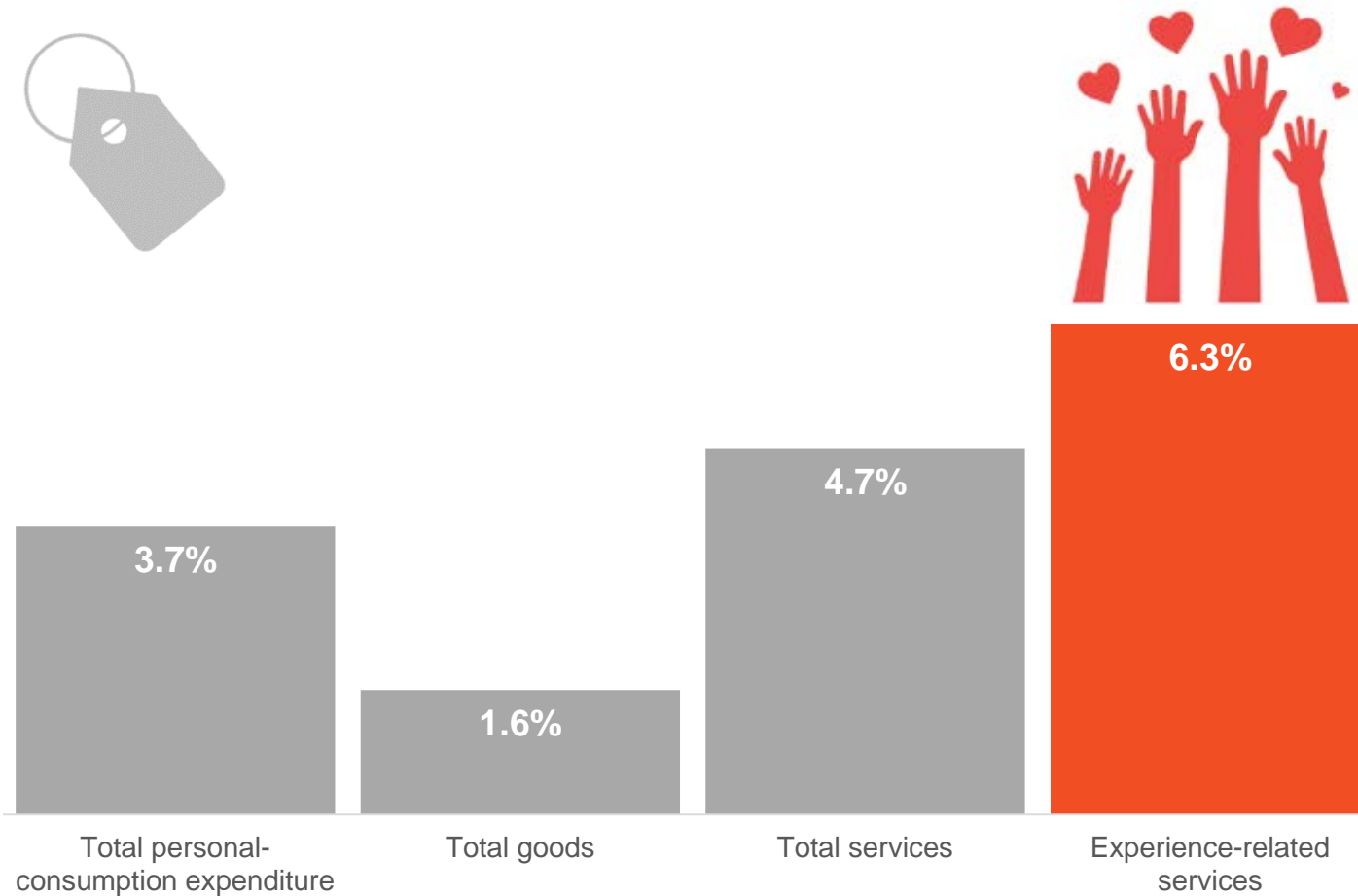


The design (look, feel and function) of a company's workplace would factor into my decision to accept a job



Experiences are Valued Over Things

Average annual personal-consumption-expenditure growth



UX Era = User Experience



**As a result,
the workplace is evolving.**

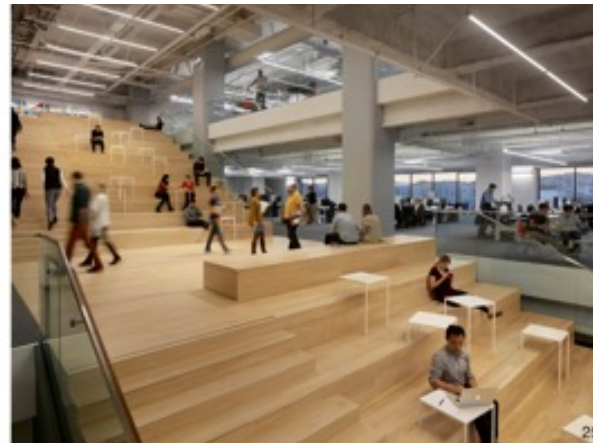
A background image of a modern office interior with glass partitions. Several people are visible working at desks. The text is overlaid on this image.

Five implications for the workplace:

- 1 Group-based work is the norm.**
- 2 Hospitality and residential influences enter the workplace.**
- 3 Despite alternatives, the office is still home base.**
- 4 Empowered by choice, employees make the workplace their own.**
- 5 Management of the real estate asset is tighter than ever.**

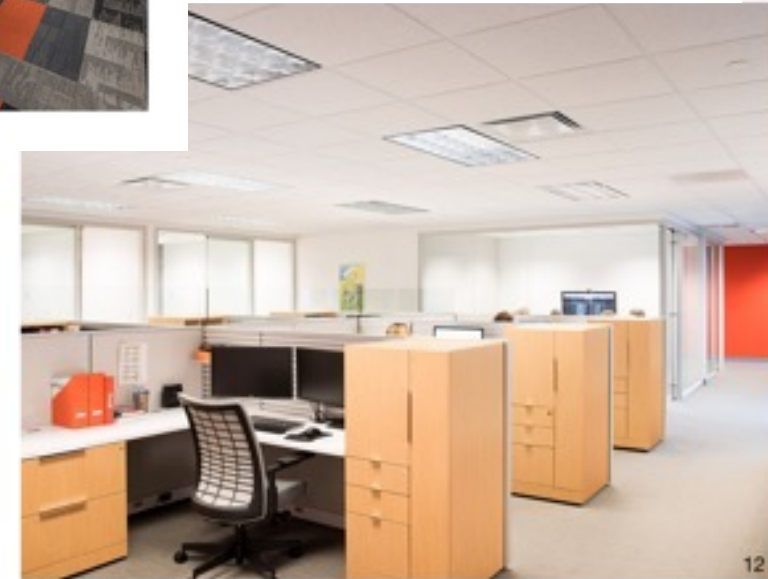
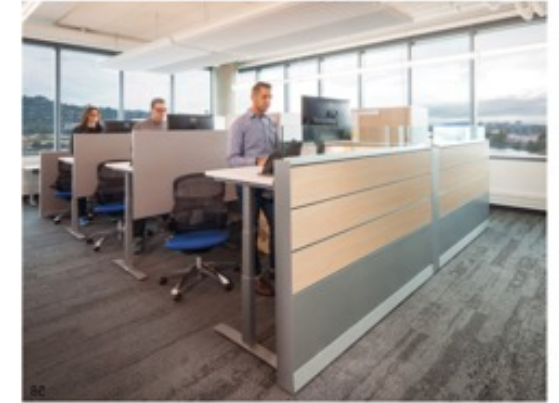
Natural, relaxing environments are desirable

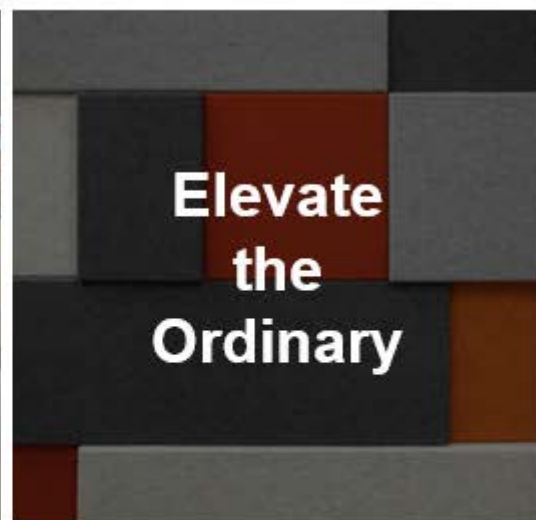
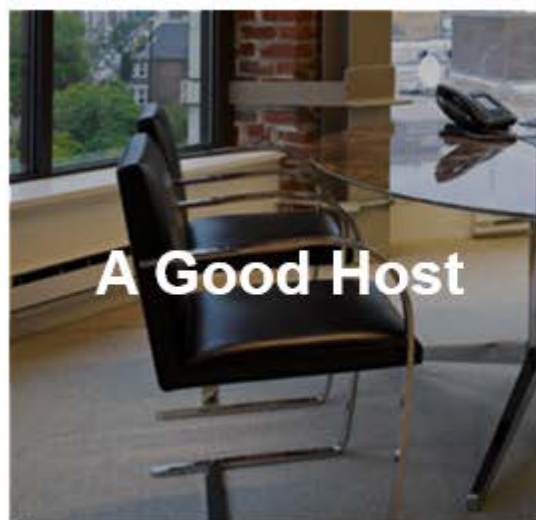
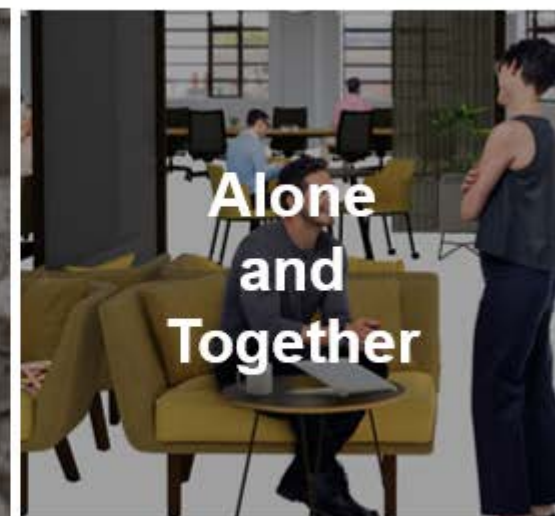
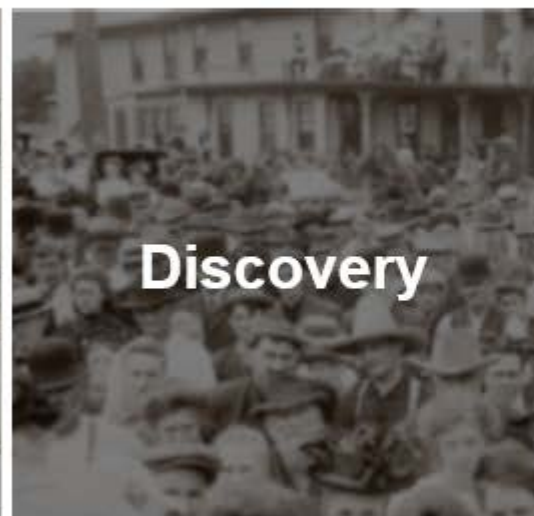
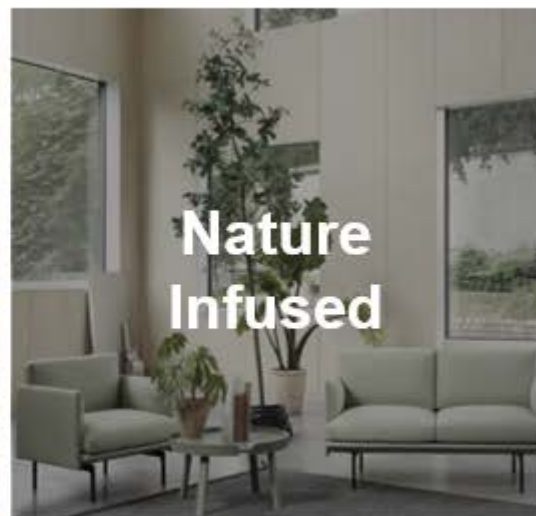
- + Warm woods
- + Natural light
- + Access to nature
- + Mixed materials
- + Feeling of comfort
- + Neutral colors with blues and greens



Busy, cluttered spaces are less optimal

- + Cold/metals
- + Busy
- + Corporate appearance
- + Multi-colored
- + White and silver with reds and yellow







**There is no workplace of the future.
There is only change.**