

A CHANGING WORKFORCE

50% of the US workforce is predicted to be independent contractors by 2020.

U.S. Bureau of Labor Statistics

40% of knowledge workers will have abandoned or removed their desk phone by the end of 2013.

Gartner Research



A WAR FOR TALENT

CEOs have a new strategy in the unending war for talent. They are creating more open and collaborative cultures — encouraging employees to connect, learn from each other and thrive in a world of rapid change.

IBM Global CEO Insights Report 2012



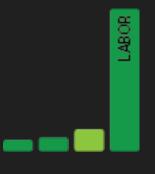


UNDERUTILZATION OF SPACE

Traditional office space has a utilization rate of

50%.

Various Industry Studies



Real estate currently represents one

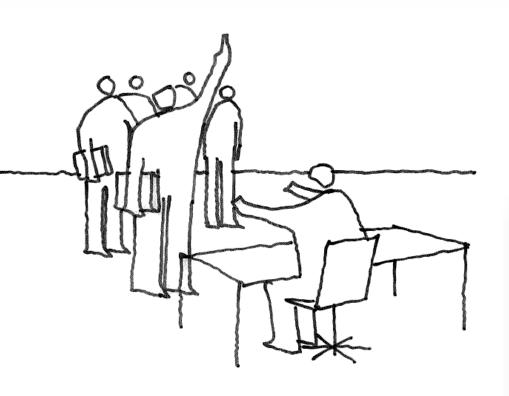
of the largest costs of doing business, second only to labor.

BUSINESS DRIVERS

MOST IMPORTANT



Workplace Strategy is now, well...strategic.



Who runs the AW Program?

	2009	2013
CRE	56%	23%
Executive leadership	7%	20%
HR	17%	23%
Other	20%	34%



Zurich American, CRE and FM Futures Forum



Resistance to AWS is reducing.

% companies claiming reason for pushback

	2007	2009	2011	2013
Organizational culture	75%	74%	65%	50%
Manager concerns	81%	71%	59%	51%
Fear of change		63%	55%	49%
Lack of Executive buy-in		55%	46%	41%
Staff concerns over losing desk		42%	41%	31%
Staff concerns over loss of contact with manager/ others		36%	32%	29%
Lack of IT support	22%	25%	30%	31%
Funding	38%	26%	29%	14%
Security	41%	14%	22%	21%



The locations for work are changing.







Workplaces outside the traditional office has increased from 28% to 40% in the past two years

Teleworkers have increased from 9 to 14%.



Generational Demands

It is estimated Gen Y will comprise more than 40% of the U.S. workforce by 2020.

- U.S. Bureau of Labor Statistics

THE TRADITIONALIST, BOOMERS, X	THE NEW GENERATION (Y OR MILLENIALS)
Dedicated Space	Choice in Where We Work
Face to Face Interactions	Face to Face + Collaboration and Media Tools
Stationary Technology	Mobile Technology
Independence, Hard Work	Collaboration, Team Work
Work is About Obligation and Challenges	Work is About Fulfillment
Health and Retirement Benefits	Work-Life Balance
Top Down or Consensus Driven Decision Making	Speedy Decision Making



The opportunity for DTLA.

- OUR SPACE IS UNDERUTILIZED 51% AVERAGE UTILIZATION
- THERE IS NO ROOM FOR GROWTH
- 3 TECHNOLOGY IS NOT SUPPORTING US TO BE MOST EFFECTIVE
- 4 LESS THAN 20% OF THE SPACE IS SHARED COLLABORATION SPACE, BUT WE SPEND 1/3 OF OUR TIME COLLABORATING
- 5 WE ARE NOT PRACTICING WHAT WE PREACH



We toured the world.

OFFICES INCLUDED:

BLOOMBERG - NYC

BOFA – NYC

STEELCASE — GRAND RAPIDS, MI

HERMAN MILLER - GRAND RAPIDS, MI

AUTODESK – SF

SALESFORCE - SF

GOOGLE – SF

AT&T FOUNDRY – SF

RUSSELL INVESTMENTS — SEATTLE

MICROSOFT - SEATTLE

PWC – LOS ANGELES

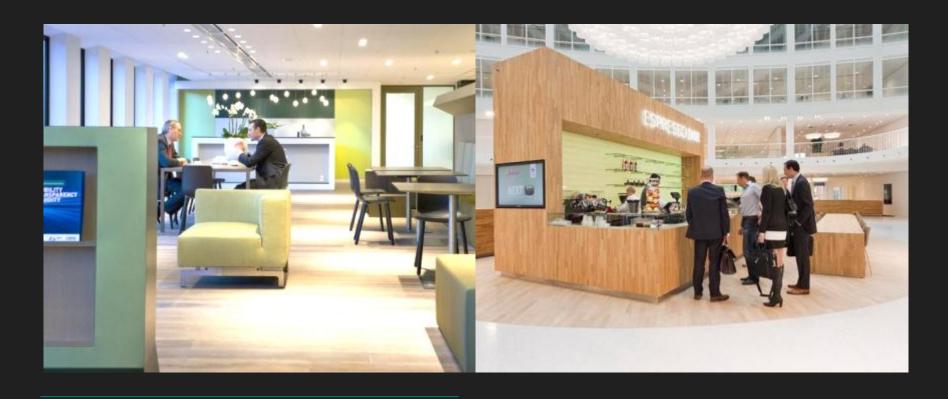
HYUNDAI – ORANGE COUNTY

ORACLE – AMSTERDAM

MICROSOFT – AMSTERDAM



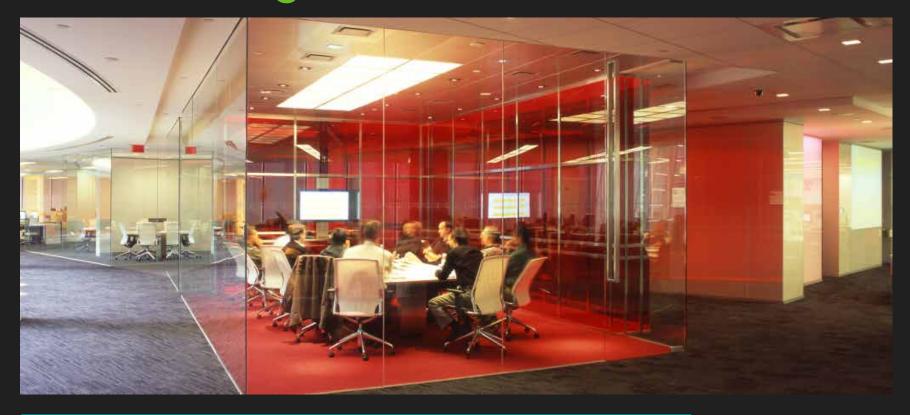
It started in Amsterdam.



CBRE HEADQUARTERS
AMSTERDAM + ENECO



Bloomberg



ENERGY & BUZZ

Steelcase



MEDIAWALL

Russell Investments



PAPERLESS

Google



HEALTH

Solving for Our Challenges The DTLA Journey



Digitization



78% REDUCTION IN FILE DRAWERS

91% OF PAPER PURGED (PRE-SCANNING)

1,169 REDUCED FILE DRAWERS FOR NEW SPACE

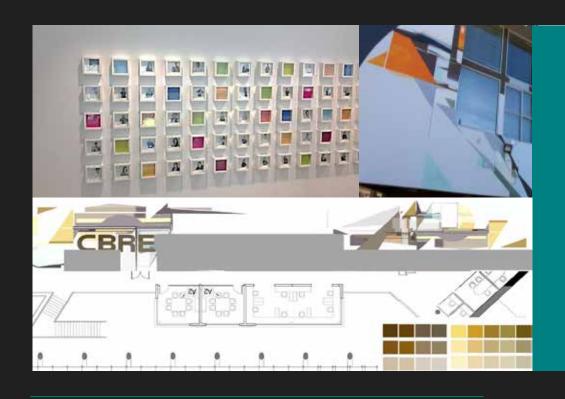
34% REDUCTION IN PAPER ORDERED (AS OF 7/13)

\$2.1M STORAGE SAVINGS OVER 10YR LEASE TERM

DIGITIZED TO REDUCE STORAGE & IMPROVE OUR PERSONAL EFFICIENCY



Art and Recognition



- LOCAL STREET ART
- MEDIA WALLS
- RISE EMPLOYEE RECOGNITION
- NEW AWARD STRUCTURES (CUFFLINKS INSTEAD OF PLAQUES)

EXPLORED WAYS TO INFUSE LOCAL AND CBRE CULTURE



Health

COMFORT

Acoustic Damping Walls (throughout)
Ergonomic Workstations (throughout)
Antimicrobial Surfacing
EMF Shielding

WATER

Filtered Water Hydration Stations

NOURISHMENT

Nutrition Tips Nutritional Snacks

MINE

Window Planters Aromatherapy

AIR

Enhanced Air Filtration

LIGHT

Circadian Lighting System™

FITNESS

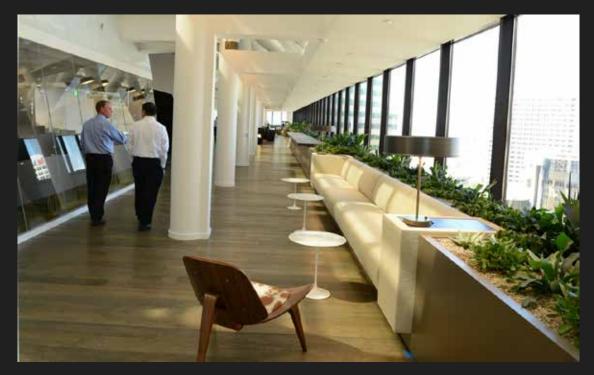
Inviting Stairs Lumbar Supporting Floor Core Treadmill Desks Stretch Area Kybun standing pad





The New Workplace The DTLA Journey

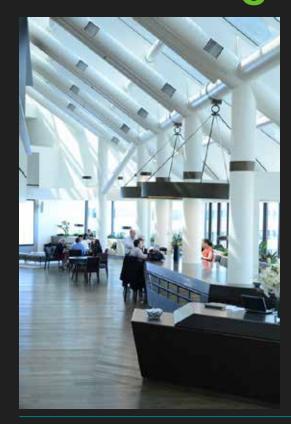
The Design Results





SUCCULENTS AND LIGHT



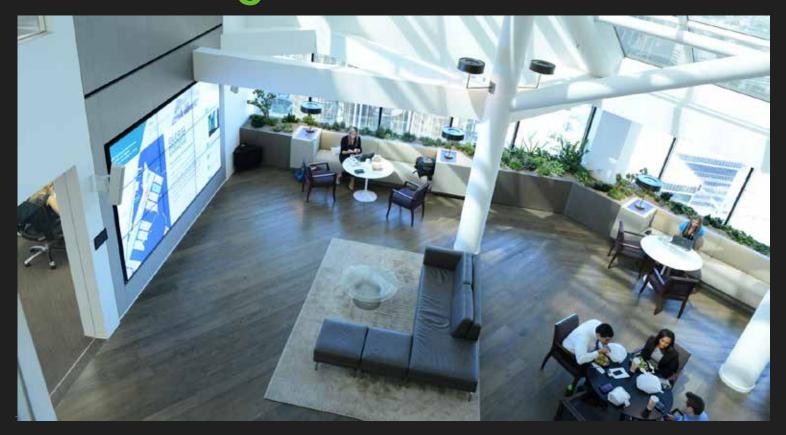






THE HEART,
ATRIUM VIEWS





THE HEART, ATRIUM VIEWS





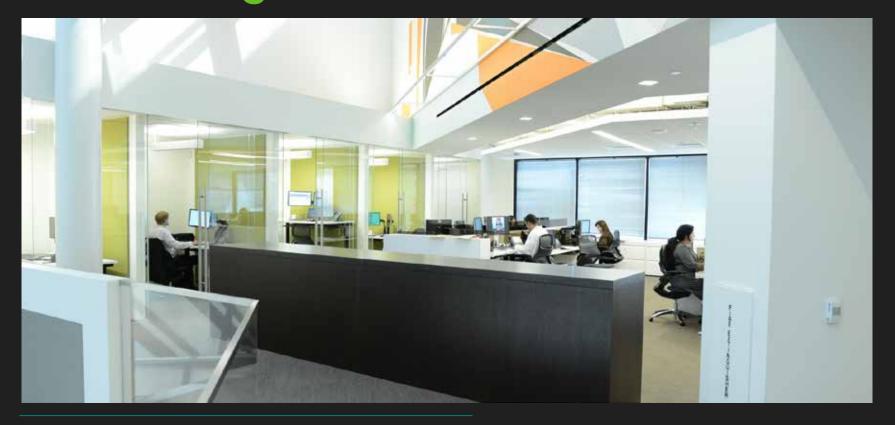
DESK-BASED WORK, VIEWS & LIGHT





OFFICE LANDSCAPE, ENERGY AND INTERACTION

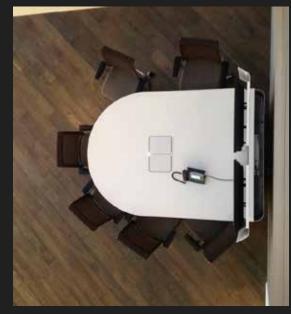




NEIGHBORHOODS,
A NEW LOGIC FOR ADJACENCY







COLLABORATE ANYWHERE, OPEN OR CLOSED



Workplace360 Metrics



