

# DESTINATION COLLABORATION: THE FUTURE OF WORK

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Operating in a highly competitive global economy, today's businesses know that attracting talented employees, and keeping them engaged and productive by offering a healthy work environment is no longer an option, it is a business imperative. So how does the physical workspace fit into the mix?

Workspaces have evolved throughout the last century – from corner offices and lunch rooms to multi-concept layouts and green terraces. The design and sustainability of an office space can have an impact on productivity, culture, talent attraction and retention and even the bottom line, which is why smart organizations are factoring workspace design into overall business and talent recruitment strategies.

For more than 50 years, Oxford Properties has worked with companies of all sizes and across many industries. In this legacy of collaborating with companies through demographic shifts, urban development, globalization, technological advances and social influences, Oxford has gained a wealth of insightful expertise into what makes the office a place of inspiration, success and an important part of an organization's cultural identity.

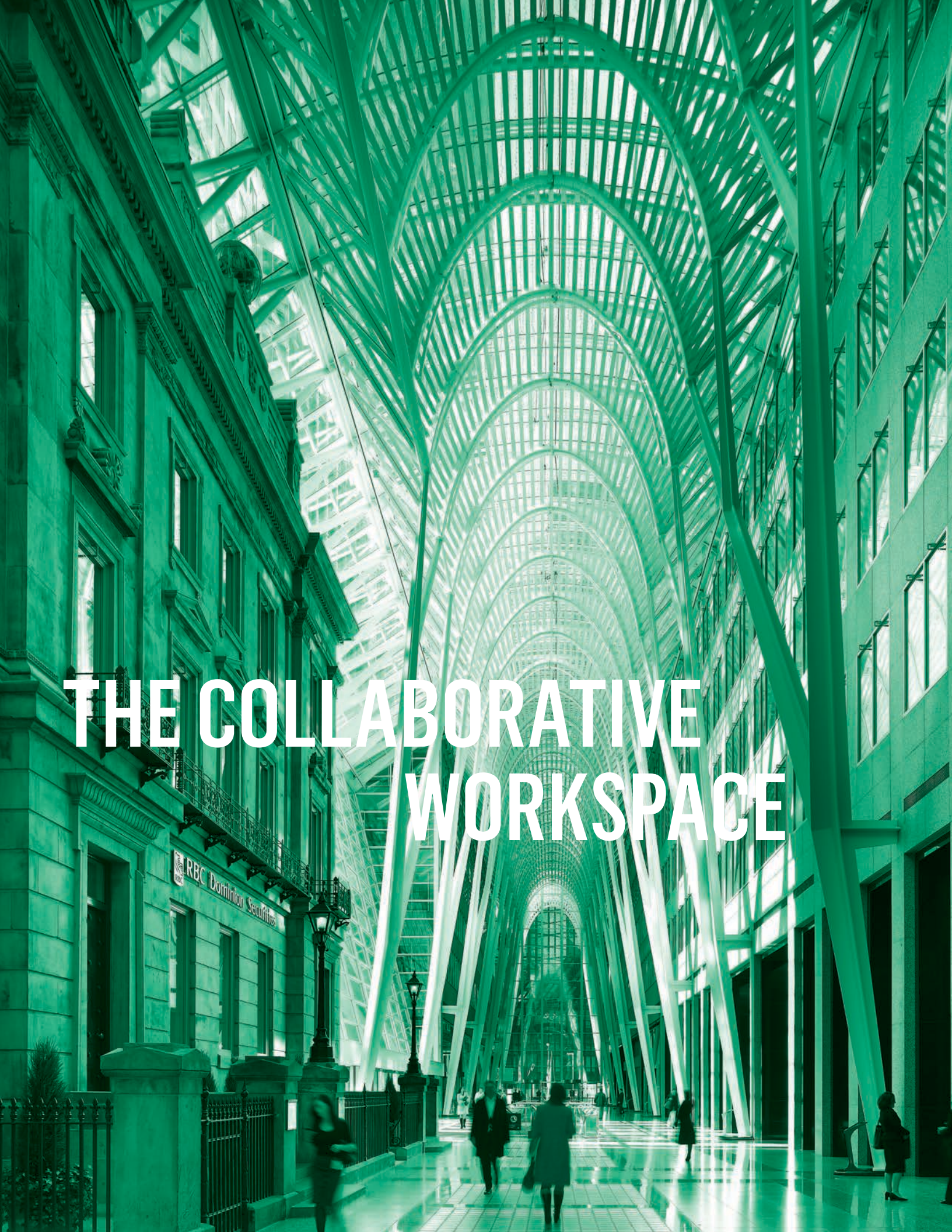
Workspace usage and design has undergone a significant transformation and more is to come. Our research shows us that the workplace of the future will be driven by many factors including:

- **The rise of the collaborative worker.** Smart organizations are recognizing the inefficiencies and lost “knowledge sharing” opportunities of operating in silos. As organizations tap into their greatest asset – their people – leading companies will find opportunities to enhance teamwork and inspire creativity through strategic office design.
- **A greater focus on work-life integration.** More organizations are offering flexible work options, but most Canadians will continue to work in the office. What was once seen as the future of work – working from home – is on the decline. Workers will be much more selective in seeking career opportunities and employers located within a reasonable commute and close to convenient lifestyle amenities and accessible transit routes.
- **Demographic shifts.** The talent pool within an organization now includes up to four generations collaborating under one roof. Organizations will look to smarter office design to help bring these generations together and accommodate differing variety of working styles and needs to create the optimal workplace

- **Environmental sustainability.** Today's employees are expecting organizations to grow their business without growing their environmental footprint. The philosophies of environmental sustainability are permeating all facets of leading organizations, including workplace design.

*To support what we hear on the ground from our customers and other Canadian businesses, we surveyed more than 2,000 office workers to get their opinion on their current office environment and perceived future of the workplace.* This paper explores tomorrow's workplace as a destination for collaboration and demonstrates that companies investing in workspace design are also investing in their people and the success of their business.





# THE COLLABORATIVE WORKSPACE

RBC Dominion Securities



## CREATING A SPACE FOR ALL

*57% of respondents say they collaborate more than they did five years ago*

Advancements in technology may afford today's workers the flexibility to work wherever, whenever, but the physical 'office' is here to stay. And today's office is more than just a place to get work done – it is a collaborative environment that brings together technology, people and culture to deliver optimal business results. It is a space that unites, for the first time, four distinct generations under one roof: Veterans, Baby Boomers, Generation X and Generation Y, who each bring their own career motivations, generational perspectives and preferred working styles to the office. Tomorrow's workplace will be a multi-functional space that incorporates the right design layout to accommodate different types of tasks, worker preferences and the nature of the business.

## The rise of the collaborative worker

In many organizations, leasing accounts for the largest expense after salaries. As a result, companies are looking to design efficient office environments that make the most of the available footprint. A smaller floor area per worker means lower real estate costs and lower operational and environmental footprint. This trend is not just about saving space, it is about creating the most productive space. At the same time, as the workforce evolves with an increasing number of Boomers retiring and a younger generation entering the workforce, a more prevalent style of working collaboratively is rising. In fact, over half (57%) of respondents say they collaborate more than they did five years ago, whether face-to-face or through communication technology like email or conference call. The younger generation, in particular, is more inclined to see collaboration as working together in person compared to their older counterparts (79% for those under 35 compared to 59% for those aged 50-64), ultimately placing a greater emphasis on physically being in the office.

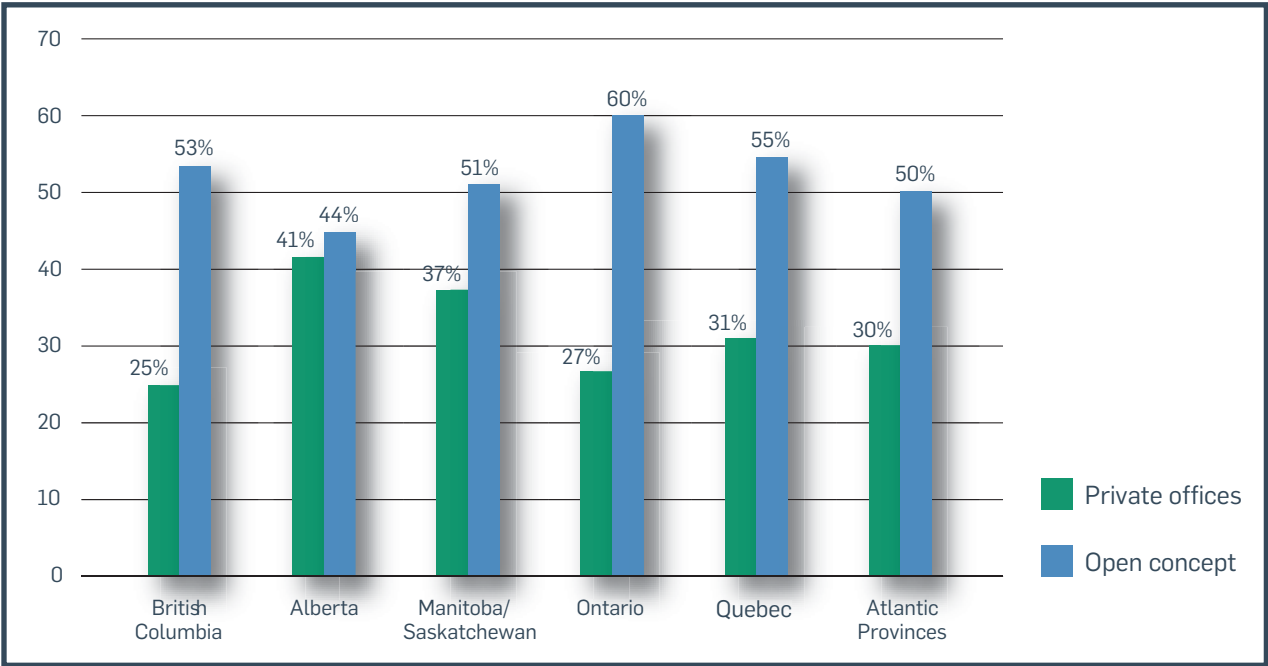
Beyond the obvious economic and environmental benefits, many organizations are embracing open concept layouts to increase communication and collaboration amongst team members. Over half (55%) of respondents cite that they work in an open concept setting compared to only 30% of respondents who work in closed, private offices. A further 14% share an office space (e.g. two or more workers in a closed door office).



# PERSONAL WORKSPACES

## By region

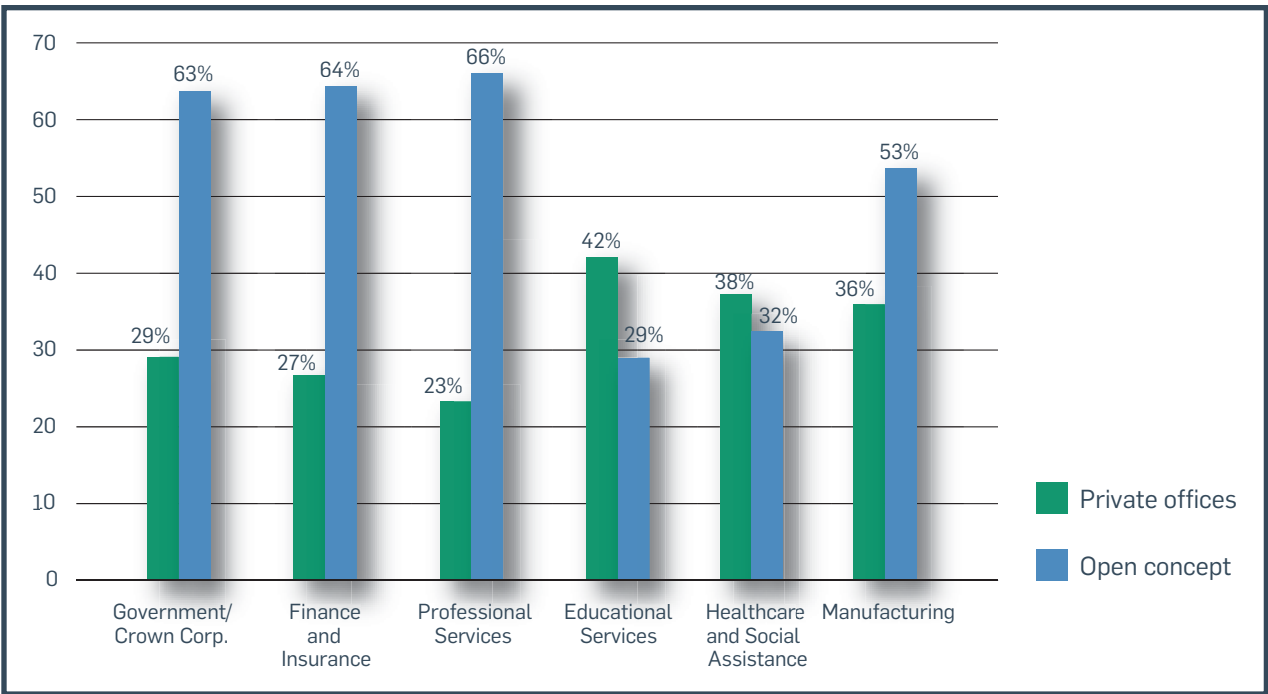
Albertans are more likely to work in a private office compared to Ontarians who work in open concept spaces



Q4. How would you best describe your personal workspace in the office? (Base n=2,009)  
\* Open concept spaces include low and high walled cubicles, as well as desks in spaces with minimal or no partitions

## By industry

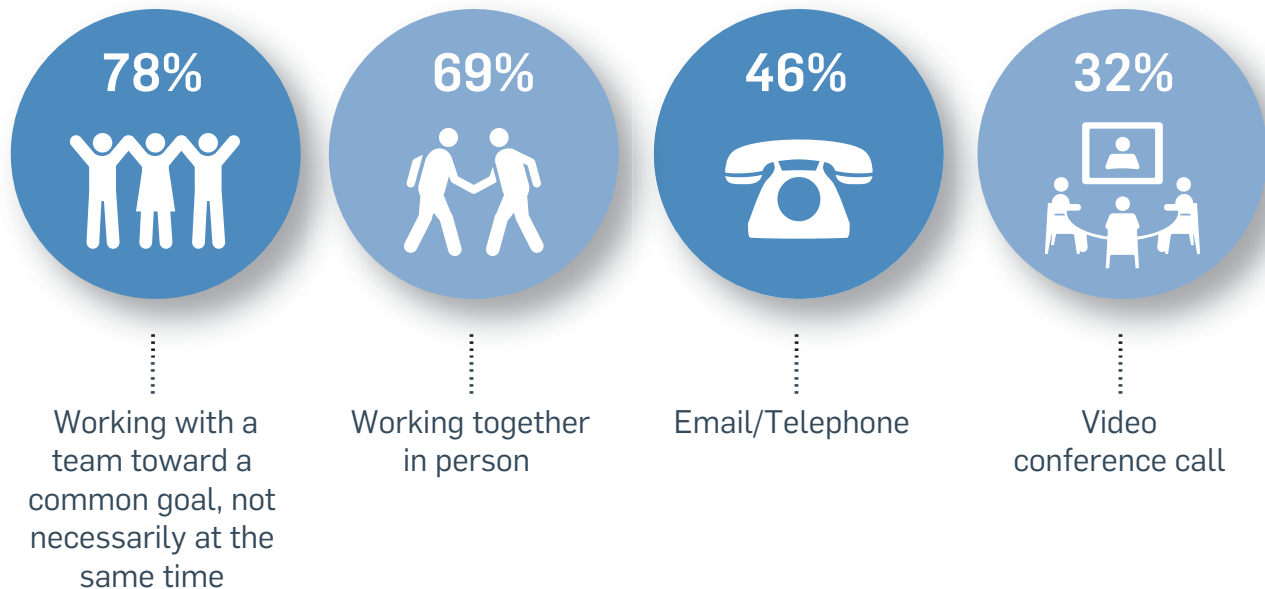
Private offices rank highest in Educational Services, while Professional Services tend to choose open concept



Q4. How would you best describe your personal workspace in the office? (Base n=2,009)

## DEFINING COLLABORATION

While collaboration generally means working physically together, it can also mean video conferencing



With collaboration in mind, workspaces are also becoming more flexible by incorporating a variety of spaces to facilitate different types of work. Many organizations are complementing their current office design with collaboration hubs for employees to step away from their personal work space into a place where they can be inspired and exchange ideas with colleagues. These alternative spaces are different from traditional boardrooms; they're more informal, ranging from alcoves, to kitchens, to lounges to outdoor terraces. These areas might contain activities or game stations like ping pong and music rooms to encourage interaction and stimulate creativity. At the same time, the new office environment also incorporates virtual technology to collaborate with workers who are telecommuting, or partners and suppliers who vary in geographic locations.

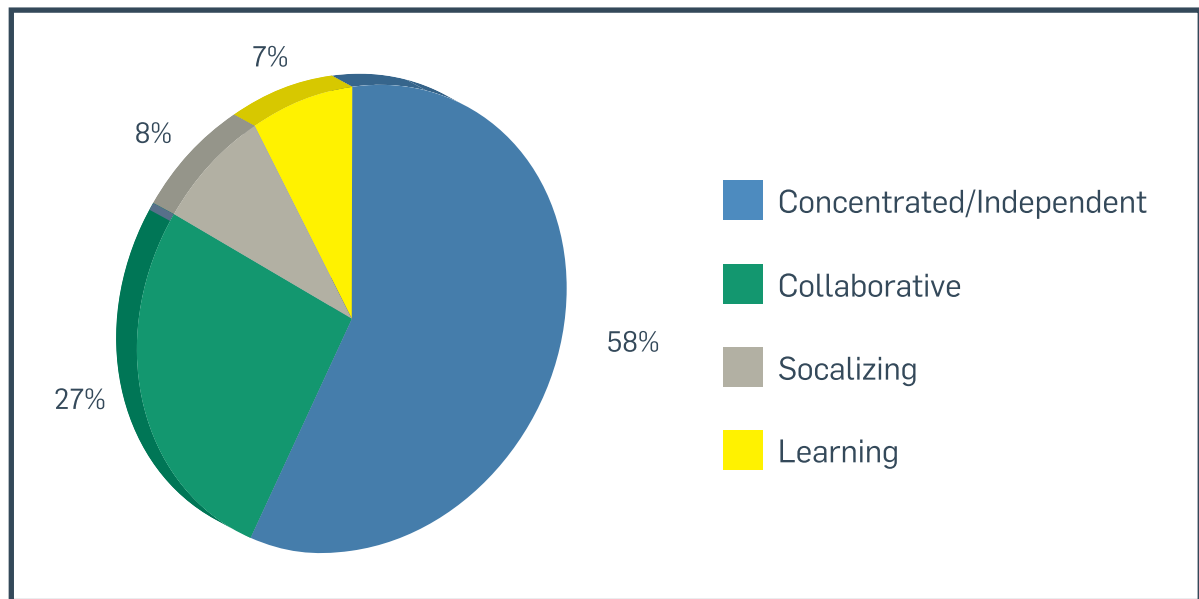
When asked “*where do you currently conduct collaborative work?*” only a quarter of respondents (24%) cited traditional boardrooms. When asked what they prefer, 51% of workers said they'd like to meet in collaboration hubs, although

fewer than four in 10 respondents are currently satisfied with the availability of collaborative spaces in their office. In fact, close to half of respondents (46%) cited a lack of meeting rooms/collaboration hubs as the main barrier to getting collaborative work done.

Across all generations, workers see the value of coming into the office, and that will likely not change. The top two benefits of the office are being able to get things done more efficiently face-to-face (53%) and feeling a greater sense of team cohesion (48%). However, Generation Y is most in favour of spaces that promote engagement between all workers, likely based on their definition of collaboration, which leans toward working in person and the desire to learn from their colleagues. Almost a quarter (22%) of those under 35 prefer to work in a flexible work destination with collaborative areas, compared to only 12% of workers aged 50 to 64 years old and 9% of those aged 65 and over.

## HOW WE WORK

There are different types of work conducted in the average office.



Q2. In a given work day, how would you break down your typical work day at the office (%) among the following types or ways of working? (Base n=2,009)

### The allure of the private office

While collaboration is on the rise for most office workers and organizations, there continues to be a strong demand for the traditional office structure across all industries. Almost two-thirds (63%) of workers would choose to have a private office if they had the choice, but only 30% actually have one.

So, what is the attraction? The office provides privacy and control, a space that you can personalize and close the door to get work done away from the hustle and bustle of workplace activity. In fact, for 67% of respondents, distraction and noise are the greatest barriers to getting focused work done, followed by a lack of private, enclosed spaces (42%) and inflexible workspaces (23%). A mix of open workstations, private offices, collaboration hubs and unassigned areas can help to alleviate the stress that can be associated with open spaces, while providing options for those seeking a quiet area to work.

When asked about hoteling – a system of unassigned seating used on an as-needed basis – a majority of respondents (89%) prefer having their own designated space, compared to only 11% who support hoteling.

The results indicate that while there is a growing preference toward designated open environments that stimulate creativity, networking and collaboration, employees still value the option of having personal spaces to concentrate and action their creativity into meaningful results. Thus, the best, most effective workspaces of the future will be those that provide a variety of solutions to meet the needs and working preferences of multi-generational employees, rather than adopting a one-size-fits-all approach to create a uniform office environment.

## CASE STUDY: FLEXIBLE AND COLLABORATIVE WORKSPACES AT RBC

The RBC Corporate Real Estate (CRE) team believes that four key factors are shaping the workplace:

- the need for flexibility to accommodate organizational growth and change;
- a desire for greater collaboration and mobility; an increased focus on environmental sustainability and;
- enhanced technology

RBC had also done research to evaluate how their employees were using their workspaces and found that at any given time, more than half of the desks and offices were vacant.

To address key insights from the research, RBC has developed a workplace concept that allows employees to better collaborate and leverage mobility. RBC created an open work environment with flexible workspaces to give employees the ability to work and sit with different colleagues at various RBC office locations. To enhance productivity, meeting spaces and employees themselves are equipped with the technology needed for mobility and effective collaboration.

This progressive workplace uses space and energy more efficiently to reduce RBC's overall environmental impact and carbon footprint. It is also outfitted with eco-friendly furniture and materials, and enhanced technology tools that allow employees to take their work with them and reduce paper waste. RBC also considers the impact of commuting on employees' quality of life and the environment, and strives to locate offices near the workforce and convenient public transit nodes.

RBC's workplace program isn't just about the location, the office space or the technology. Managing the transition to this new way of working is crucial to making RBC's new workplaces a success. For many – even the most enthusiastic adopters – change can be a major challenge and there is always a transition period to adjust to new environments.

When employees are moving into a new workspace, RBC CRE partners with the business units of those employees to openly communicate the philosophy behind this new way of working and to ensure employees have support throughout the transition.

RBC is seeing the benefits of its new workplaces, with approximately 2,500 employees now participating. RBC has achieved some rental cost savings through reduction of the office footprint, but most importantly, RBC employees have responded positively to the change with 89 per cent stating that overall, they endorse the new workplace concept.

As the CRE team receives feedback from business units and employees, suggestions are incorporated into the evolving workplace design. One of RBC's latest projects was the renovation of 180 Wellington Street West in downtown Toronto, where the latest workplace concept was rolled out to operations and human resources teams.

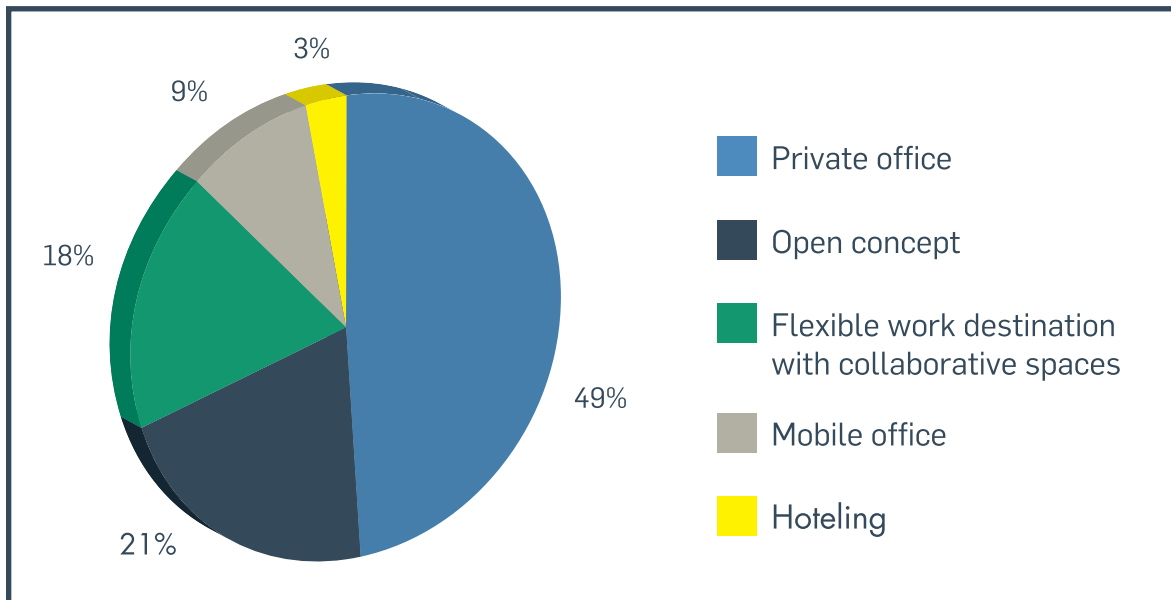
"Our HR recruiting team is now interviewing prospective employees in the type of workplace that we are building for our future workforce," said Nadeem Shabbar, Vice President, Corporate Real Estate, RBC. "In addition, we are looking forward to moving 4,000 people into our newest workplace at RBC Waterpark Place in 2014."





## THE FUTURE WORKSPACE

When considering the future workplace, Canadians prefer private offices, but would work in open, collaborative spaces



Q29. Taking a look at some of the envisioned future workplaces, which best reflects the one you would most want to work in?  
(Base n=2009)

## Conclusion

With the rising focus on collaboration, it will be increasingly important for organizations to consider whether their current office space is the right fit for the nature of their business, corporate culture and the mix of employees. Collaboration hubs provide employees with a unique location to step away from focused work to interact and share ideas with colleagues. Yet, there is also a strong employee desire for private offices, which provide workers with control to shut out distractions of the broader office environment. The most desirable workplace will be one that factors in a smart mix of employee needs into the design of a productive and cost-efficient space.

### Five questions to consider:

1. How well does my current office design facilitate collaboration?
2. Do employees have access to different workspaces to fit their needs?
3. What work style does my future talent desire?
4. How can the design of my work space promote my company culture?
5. How can technology help with future office design?



# WORK-LIFE INTEGRATION

## THE VALUE OF TIME

### *33% of workers admit they'd work an extra three hours per week for a reasonable commute*

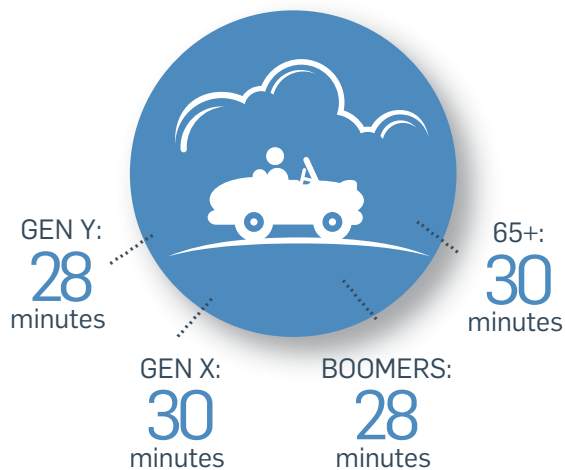
Statistics Canada reports that 15.4 million Canadians commute to work. Whether by car, public transit, walking or biking, the commute is putting added pressure on employees' time to squeeze both work and personal priorities into their days. As a result, more and more office workers are identifying future employment options with companies that are within a reasonable commute from home and located near convenient amenities. In short, today's workers no longer want to compromise quality of life to commute to the perfect job.

Many companies are also relocating to the core of Canada's largest cities to be closer to current and prospective talent. Young, high-potential professionals, in particular, are drawn to the larger city cores to get all-in-one access to work, culture and nightlife.

### The 30-minute 'sweet spot'

According to the survey, Canadians believe that an average acceptable commute time is approximately 30 minutes, one way. The good news is that expectation and reality are almost aligned, with the average one-way commute time registering at 29 minutes for respondents nationally. But there are large regional differences. Nine in 10 workers in Atlantic Canada commute 30 minutes or less compared to only six in 10 Ontario workers who commute within this time frame.

AVERAGE COMMUTE IN MINUTES  
FOR EACH GENERATION GROUP



AVERAGE COMMUTE IN MINUTES  
FOR CITIES ACROSS CANADA





## The Swing Factor: Location, location, location

When it comes to the ideal workplace, geographic location and commute time are highly important considerations for workers when all other factors are held constant. Three-quarters of Canadians identify a reasonable commute to the office as their most valued attribute, followed by access to public transportation (44%), as well as being within walking/biking distance to home (35%). However only half (52%) of workers believe that their workplace is situated within a reasonable commute, which could be a rising cause of concern for organizations. Why?

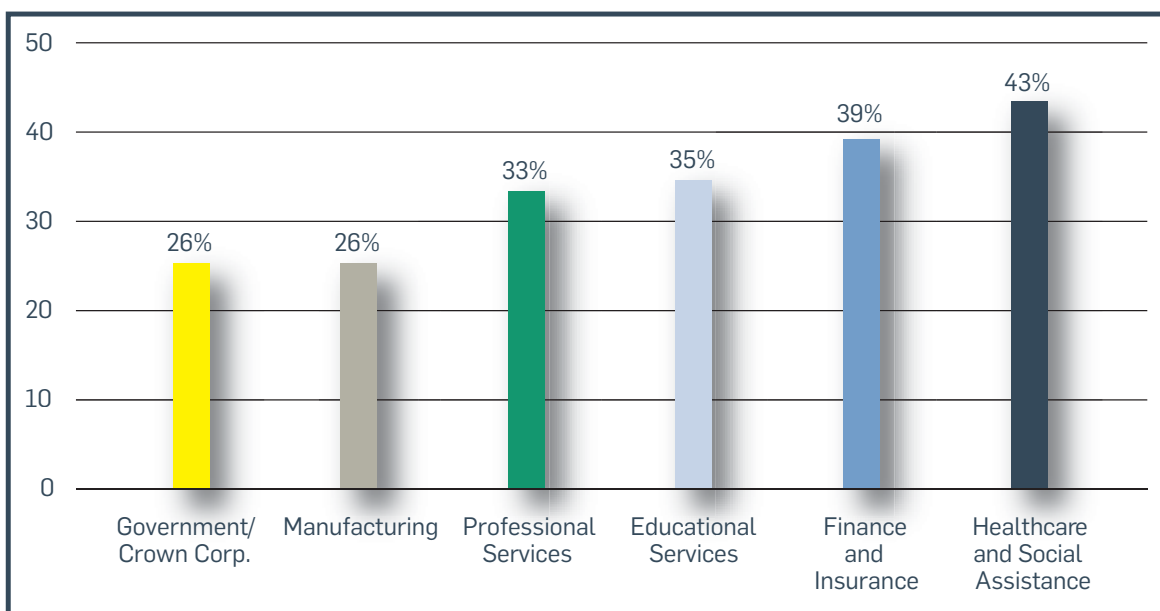
According to the survey, commute time has a significant influence on the employment opportunities Canadians choose to pursue, and has an impact on how workers view their workplace, job satisfaction and overall happiness. **All else held constant, commute time (50%) would be the main deciding factor of choosing one job over another.** This trumps access to a private office (42%), which has been identified as the ideal workspace configuration for many workers. A quarter of respondents also consider walking and biking to work as a priority, and want their offices to be equipped with the proper amenities to support this. Not surprisingly, workers in regions with the longest commute rank travel time as the most important workplace consideration when choosing to work for one company over another (54% of Ontarians compared to 44% in Atlantic Canada).

While some Canadians may change jobs for a shorter distance to work, **one-third (33%) of workers also admit they'd be willing to work an extra three hours per week for a reasonable commute.** Twenty-eight percent would also work longer to be within walking or biking distance to home.

Of all the generations, younger workers in the downtown city core place the greatest emphasis on being able to walk or bike to work, likely since a growing proportion of the younger generation are leaning toward living and working in urban centres, and have grown up in the eco-conscious era. On a scale of one to ten, workers under 35 years of age ranked "being within walking or biking distance" an average score of 6.9 in importance, which was significantly higher than all other age groups in working in downtown or suburban offices. As an increasing number of younger workers flock to large city centres, they will likely choose strategically and conveniently situated employers that complement their work-life priorities and preferences. Organizations that recognize the value employees place on their time will have a greater chance of attracting and retaining the brightest, most engaged employees.

## WHICH INDUSTRY IS WILLING TO WORK LONGER FOR A SHORTER COMMUTE?

Healthcare and social assistance and finance and insurance workers are willing to work longer than other industries for a reasonable commute



Q25. How willing would you be to work 3 more hours above your standard work week, for each of the following? Job within a reasonable commute (Base n=2,009)

## Work from home – myth or reality?

Advancements in technology have made the workplace more flexible by making it easier for people to conduct business virtually. Yet, despite the rise in communication technology, such as email and video conferencing, only nine per cent of respondents envision the future workplace as a mobile office.

In fact, working from home or from another off-site location is an anomaly, even in today's technologically advanced workplace. The majority of respondents (51%) work solely in the office reporting that they never work off-site. Working in the office is more prevalent among women than men (58% versus 43%, respectively), workers aged 50-64 years old (57%) and Atlantic Canadians (66%).

For 49% of respondents who do sometimes work virtually, the average time spent working from home is only 1.8 days a month. Owners and senior managers are the most likely to work off-site, averaging 3.4 days. Regionally, Calgarians rank highest, working 2.5 days a month outside of the office (not including business travel days).

Fewer distractions are also a key benefit for close to half of workers (43%) who claim that they can more effectively and efficiently complete independent work outside of the office. As a result, organizations that have flexible office layouts with private workstations may be able to provide better options for their employees looking to fulfill this need, instead of or in addition to, allowing more flexibility to work off-site when preferred.

## Conclusion

The survey revealed that while technology has allowed the possibility of working virtually, physical office spaces remain an important destination for many Canadians seeking collaborative, face-to-face interactions with colleagues. There will also be a growing demand from employees to cut down on commute time to satisfy their career and lifestyle needs and preferences without compromising on quality of life. Employees ideally want to travel within a 30-minute radius from home to work and will strategically choose employers based within this proximity. In fact, this “sweet spot radius” is so important to employees that many would be willing to work longer for a shorter commute time.

To improve workplace satisfaction and attraction and retention of top talent, forward-looking Canadian businesses should factor in the accessibility of their offices and the geographical spread of their most talented employees or target prospects to ensure businesses situated within prime travel distance. Organizations will also benefit from accommodating employees with various

travel preferences or lifestyle needs. For example, while strategic selection of office location will be important to minimize commute time, employers can also offer secure bike racks for those – particularly the younger generation – preferring to bike to work. Employers can also make proximity to convenient lifestyle amenities a key consideration in the strategic selection of their future office space to accommodate employees and support a better work-life balance.

### Five questions to consider:

1. **What is the average commute time for my employees?**
2. **Are there amenities that I can add to help employees balance lifestyle demands?**
3. **Does my organization provide a diversity of working options?**
4. **Are there multiple commuting options to my office location? (e.g. transit, bike racks etc.)**
5. **How can technology support the broader workplace strategy?**





# THE MULTI-GENERATIONAL WORKFORCE



# AN OFFICE COMMUNITY FOR TOMORROW'S WORKERS, TODAY

An emerging trend in the workplace is the new multi-generational labour force composed of four distinct generations working under one roof. Understanding the composition of today's workforce, and offering flexible solutions to accommodate the different working styles and needs of these groups will have a tremendous impact on how workers interact and perform within an organization.

## The younger worker

Born between 1980 and 2000, Generation Y represents more than one-third of Canada's population and is the largest demographic group to emerge after the Baby Boomers. Gen Ys are known for being optimistic, collaborative, and tech savvy. They are also more eco-conscious than older generations and expect their organizations to follow suit.

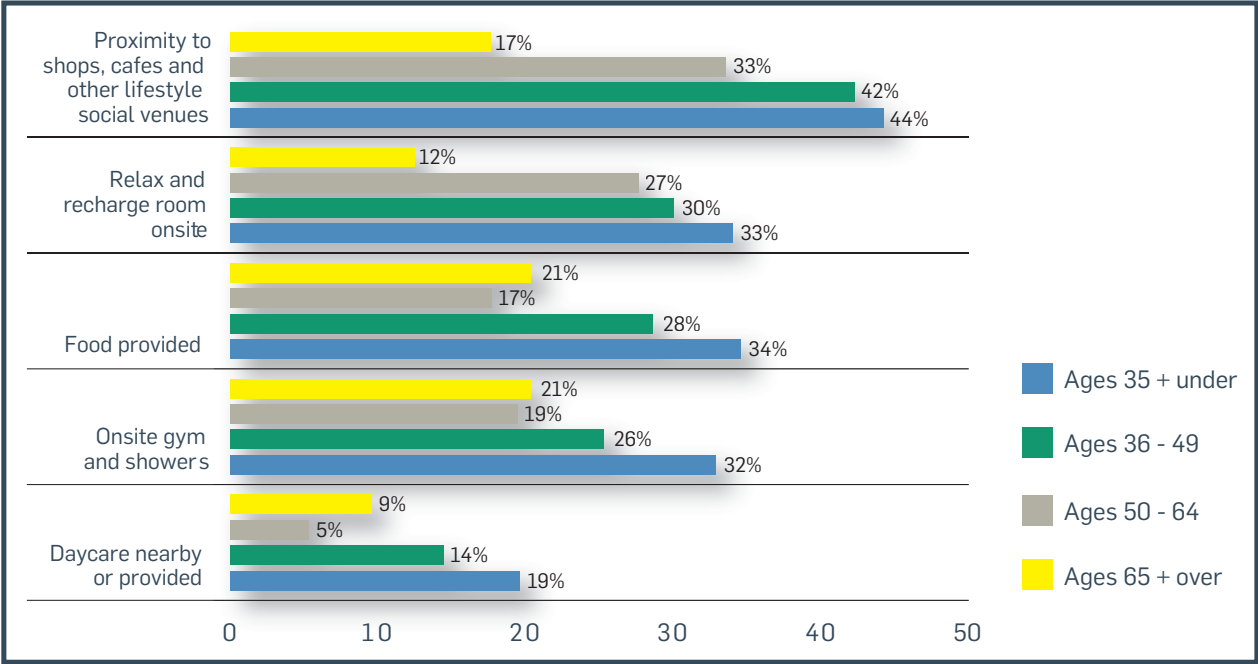
According to the study, Gen Y is the most likely to want to work in the office and take advantage of human interaction, with four out of five (79%) citing that collaboration means physically working together in the same space, compared to only 58% of workers aged 65 and up. As a result, offices that incorporate collaboration hubs – such as informal meeting rooms, kitchens or green terraces – will likely appeal more to younger employees seeking areas where they can both work and connect with colleagues.

But working closely with colleagues isn't the only important consideration for Gen Y. Looking to the next five years, close to 60% of office workers under 35 believe they will want to work for an employer that is committed to providing an environment that fosters well-being, such as work-life balance, physical and mental health and sustainability practices.

For many Gen Ys, this includes being part of a workplace that has on-site or nearby amenities that contribute to their lifestyle, such as shops, restaurants and entertainment (44% compared to 33% of Baby Boomers, or those aged 50-64); on-site gyms and showers (32% versus 19%); and food and snacks provided in the office (34% versus 17%). Workers aged 35 and under are also more likely than all other age groups to say they would work three extra hours per week for access to these amenities. Organizations will be highly valued by employees if offices are designed and positioned as a place that is more than just a place to work, but provides opportunities for young professionals to flourish and integrate work and life by being close to convenient lifestyle amenities.

## GENERATIONAL VALUES

Generation Y expect the workplace to include more lifestyle amenities in the future



## Cross-generational socializing

While each generation has its own expectations for the workplace, socializing and networking is a consistent value for all generations working in the office. The research shows that ***the main benefits of working in the office are social in nature and far outweigh productivity or having access to tools, such as equipment and files.*** Meeting face to face (53%), feeling a greater sense of team cohesion (48%) and the social aspect (40%) all ranked within the top five benefits of working in an office. Productivity (36%) ranked fifth on the list.

Where do respondents prefer to socialize? An off-site, third-party location, such as a coffee shop or restaurant, is the most popular venue (22%), with informal open, collaborative spaces within the office (14%) ranking as second choice. Having access to on-site or nearby amenities that enable generations to come together in social settings will help organizations and their employees cross generational boundaries.



## Conclusion

A multi-generational labour force is bringing new perspectives and work-life priorities and needs into the workforce. Each generation has been uniquely affected by the proliferation of technology, generation-specific social trends and the rise of globalization, and organizations need to understand how this has affected each generation of the workforce in terms of their work-life values, socializing and working styles, office space needs and career motivations. For example, the Boomer generation follows the value of 'work to live', while younger generations embrace the 'live and work' philosophy. As such, the younger generation in particular is seeking office environments that contribute to well-being and quality of life through convenient access to amenities. Workers of all generations are also looking for opportunities to collaborate and socialize, and view the workplace as a vehicle to fulfill that desire. Organizations will need to consider how their current office amenities and design responds to different values and needs of the multi-generational workforce.

### Five questions to consider:

1. Does my office building support both my work and my lifestyle preferences?
2. What lifestyle amenities are onsite or nearby?
3. How well does the current workspace support different generational workstyles?
4. Is my workspace flexible to future generational workstyles?
5. Have we created spaces for collaboration and socialization?





OXFORD  
50 YEARS

# SUSTAINABLE VALUES



## THE SUSTAINABILITY FACTOR

According to Canada Green Building Council (CaGBC), buildings generate about 35% of all greenhouse gas emissions in Canada. As a result, organizations are making a conscious effort to incorporate green features into their designs and workplace practices, from reducing energy use and emissions to aligning with green building certification programs like Leadership in Energy and Environmental Design (LEED) and BOMA BEST. Sustainable design features like green terraces, living walls and outdoor spaces where employees can relax and recharge will become important considerations when creating collaborative, yet environmentally sustainable spaces.

Employees also expect their workplaces to be proactive in adopting green initiatives, and no longer consider environmental stewardship as a 'nice-to-do', but rather feel it is a business imperative. In fact, one-third (34%) of respondents say that environmental focus is very important to them, consistently ranking it high among desired workplace features. This beats out other office features, such as access to an on-site gym or innovative design. Looking ahead, half of respondents also believe that working in a sustainable office will continue to be important to them within the next five years.

While the study shows that access to meeting rooms and noise control are attractive to respondents, they are not as important as meeting basic human needs. The top three desirable office features are air quality and comfortable temperature control (both 81%) and natural light (74%). These are also the top three features that employees would change about their workplace to improve overall well-being and satisfaction at work. The good news is that organizations, working with their property developers and managers, are able to control these features to keep employees and sustainability considerations top of mind.

There are many innovative and eco-friendly options available to organizations to address and improve basic workplace features such as air quality and temperature control and lighting. For example, deep water source cooling systems can help businesses reduce energy consumption when cooling office spaces, while exterior shading or fins may be incorporated into a building's façade design to reduce the amount of direct sunlight absorbed by glass windows. Daylight harvesting practices to offset the use of electric lighting and leveraging bright, natural lighting in open concept and private office environments can also contribute to the reduction of an organization's energy use and environmental footprint.

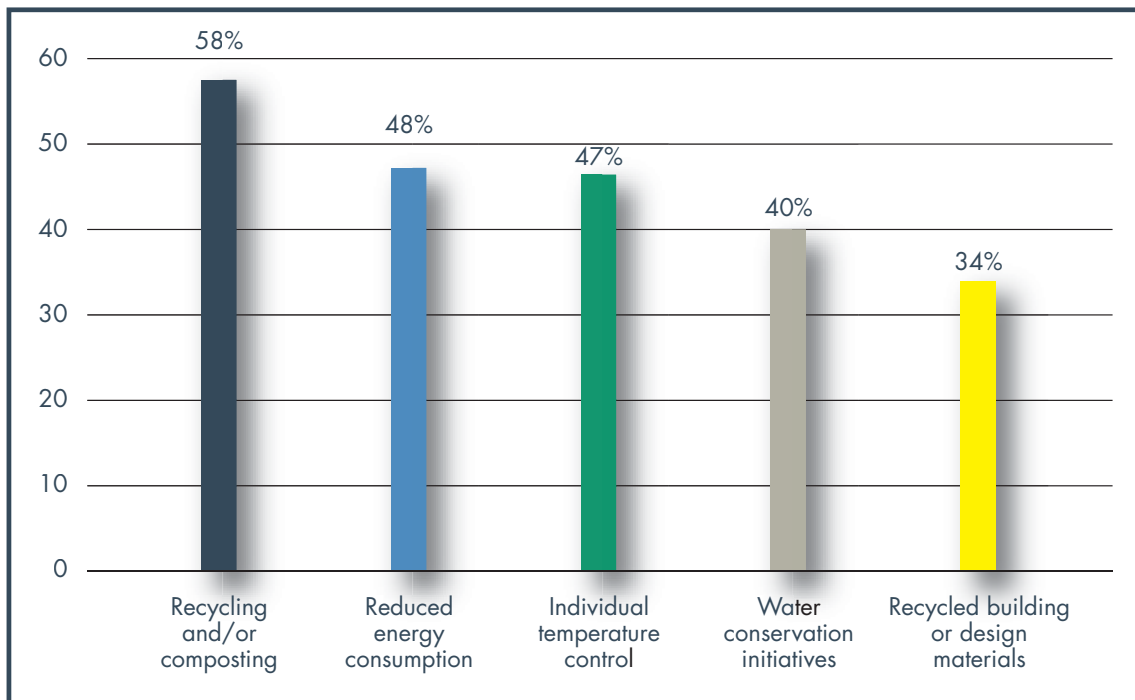
So, how do organizations stack up in providing sustainability initiatives in the office? Businesses have room to improve. More than half (58%) of respondents cite recycling and/or composting as the most important office activity supporting sustainability, although only 38% of workers believe that their organizations are doing it effectively. This is followed by reducing energy consumption (48% versus 25%) and implementing individual temperature controls at each workstation (47% versus only 10%).

A significant proportion of respondents could not even rate their organization's and office building's efforts to support sustainable design or workplace initiatives as they are not aware of what their company is currently doing. This is the case for roughly one third of respondents when evaluating the usage of recycled building materials, implementation of water conservation initiatives, and accessibility of bike lockers and electric vehicle charging stations. It is clear that building owners and organizations have room to improve in the area of communicating sustainable building features and showcasing environmental initiatives that foster greener workplaces to demonstrate the business's commitment to corporate social responsibility and encourage employee involvement.



## ENVIRONMENTAL SUSTAINABILITY

Canadians ranked workplace sustainability initiatives they felt were most important to create a greener work environment.



Q15 Thinking about the issue of environmental sustainability, in relation to your work place, how important are the following to you? (Base n=2,009)

## Conclusion

Now more than ever, Canadians are placing a greater emphasis on the importance of sustainability in the workplace. More and more, employees will expect employers to 'walk the talk' and incorporate sustainable business practices and philosophies into day-to-day actions and office surroundings. Picking up on this trend, today's property owners and managers are incorporating new technologies and advancements in building design features to help reduce greenhouse gas emissions and improve environmental efficiencies.

However, a truly sustainable office is about more than just the building's fabric and systems. Organizations have a role to play in growing their business without growing their environmental footprint. Much of this can be achieved by consistently keeping environmental considerations present in everything they do, from the office space a business designs for its employees to the day-to-day sustainability initiatives it implements in the workplace to create a greener, healthier place to work.

### Five questions to consider:

1. *To what extent is sustainability a factor in our business strategy?*
2. *How can I work with my facility to improve on sustainability initiatives?*
3. *Does my office building provide new sustainability options?*
4. *Are my employees aware of our sustainability initiatives?*
5. *Does my facility help educate my employees on ways to be sustainable? Does my organization?*



## CONCLUSION: EVOLVING FOR TOMORROW

The workplace is more than just a place to conduct business; it is a multi-functional environment that needs to respond and adapt to the changing priorities of business, its employees and the community.

Shifting business and workforce needs will continue to influence the workplace and how it is designed to accommodate new sustainability standards, multi-generational workforce needs and values, and technological advancements. The shift in needs will necessitate the incorporation of flexible workspaces to allow employees to conduct different types of work.

The survey demonstrates that the majority of Canadians who work in office buildings prefer a smart mix of office design solutions and accommodations, and findings indicate that the future workplace will be shaped by four main trends: the rise of the collaborative worker, a greater focus on work-life integration, the emergence of the multi-generational workforce, and a growing employee emphasis on environmental stewardship within the workplace.

As technology, employee demographics, globalization and social values continue to evolve, smart organizations that truly value innovation and top talent retention need to look beyond simply re-arranging furniture, and understand how these trends may affect productivity, creativity, culture and corporate leadership to create a truly exceptional workplace.

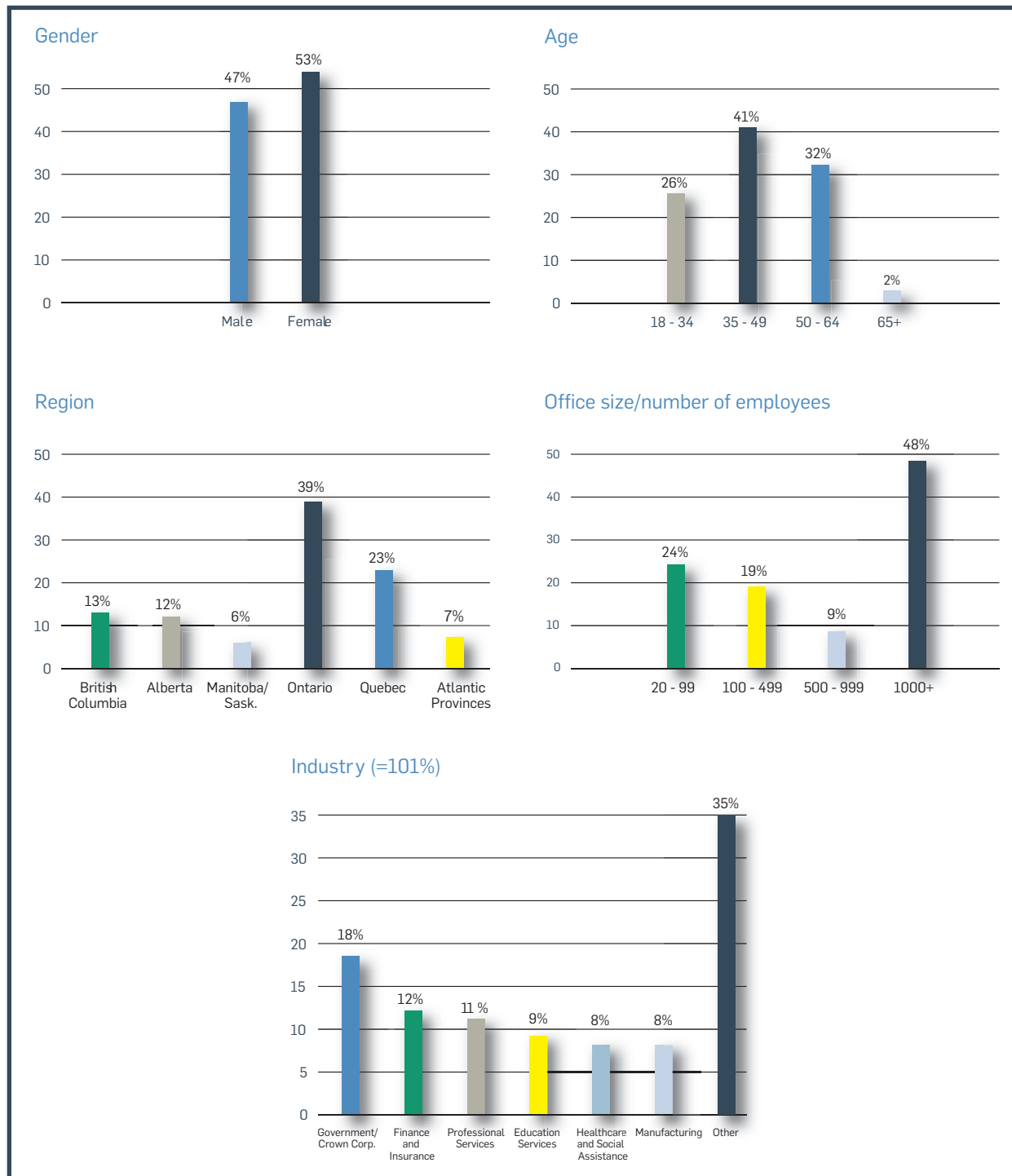




## RESEARCH METHODOLOGY

The Future of Work Study was commissioned by Oxford Properties and conducted by Environics Research Group throughout June 2013.

This survey was conducted as an online study with 2,009 Canadian office workers, drawn from a panel that has been recruited to be reflective of the general population profile. The survey covers over seven industry groups, with regional representation across the Canadian provinces.



Methodology note: According to the rules of the Market Research and Intelligence Association (MRIA), the national marketing research association in Canada, the only surveys that report margins of error are probability samples where every Canadian adult has an equal likelihood of being contacted for the survey. That essentially means random telephone polls. Since Environics' online polls are conducted using panels of people who have agreed to be contacted for research, they are not probability samples because Canadians beyond the panel are not invited to participate. Panels used by Environics Research Group are recruited to be reflective of general population distributions, and strict controls (interlocking age, gender and region quotas) are applied to ensure data quality on every survey.

## ABOUT OXFORD PROPERTIES

Established in 1960, Oxford is a global real estate investor, developer and manager, with distinguished portfolios in the office, retail, industrial, multi-family and hotel sectors.

The Company employs more than 1,700 talented individuals with a wide range of professional skills, a shared focus on real estate, and a passion for service. Oxford is divided into three geographical regions, Canada, the US and the Europe, each of which operations a vertically integrated platform. The executives who lead each region are all members of Oxford's executive management team and its investment committee.

Through its real estate management group, Oxford manages day-to-day operations in all of our directly owned assets in Canada.

We rely on the efforts of an experienced team of professionals in real estate management and leasing to exceed the needs of our customers and partners, while enhancing the value of our properties and delivering on return objectives.

Oxford's commercial leasing team leverages strong broker relationships, real time online leasing information, and long-term relationships with national customers to deliver the best in tenant space solutions and satisfaction.

The ground-level insights that Oxford gains through the real estate management team are invaluable in helping to guide and implement our larger investment and asset management strategy.

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