



Workplace of the Future: Progress, But Slowly

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Study Purpose and Methodology

- The goal of the study:
 - Understand how the modern workplace is evolving in terms of how and where people work, as well as the hardware, software, services and capabilities that employees expect from their employers
- Study methodology:
 - Online survey of 1,001 working US adults aged 18-74 who use technology devices in their work from medium (100-999 employees) and large (1,000+ employees) companies across a wide range of industries



Work Statistics

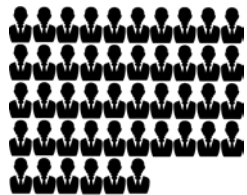
43

Hours Per Week
On Average

Top 5 Work Locations	Hours Per Week
Office/Cube	19.6
Non-Office Workspace	5.4
Home	4.6
Alternative Workspace in Office	3.3
At Client Site	2.6

150%

Expected Increase in Hours at Home
In 2 years



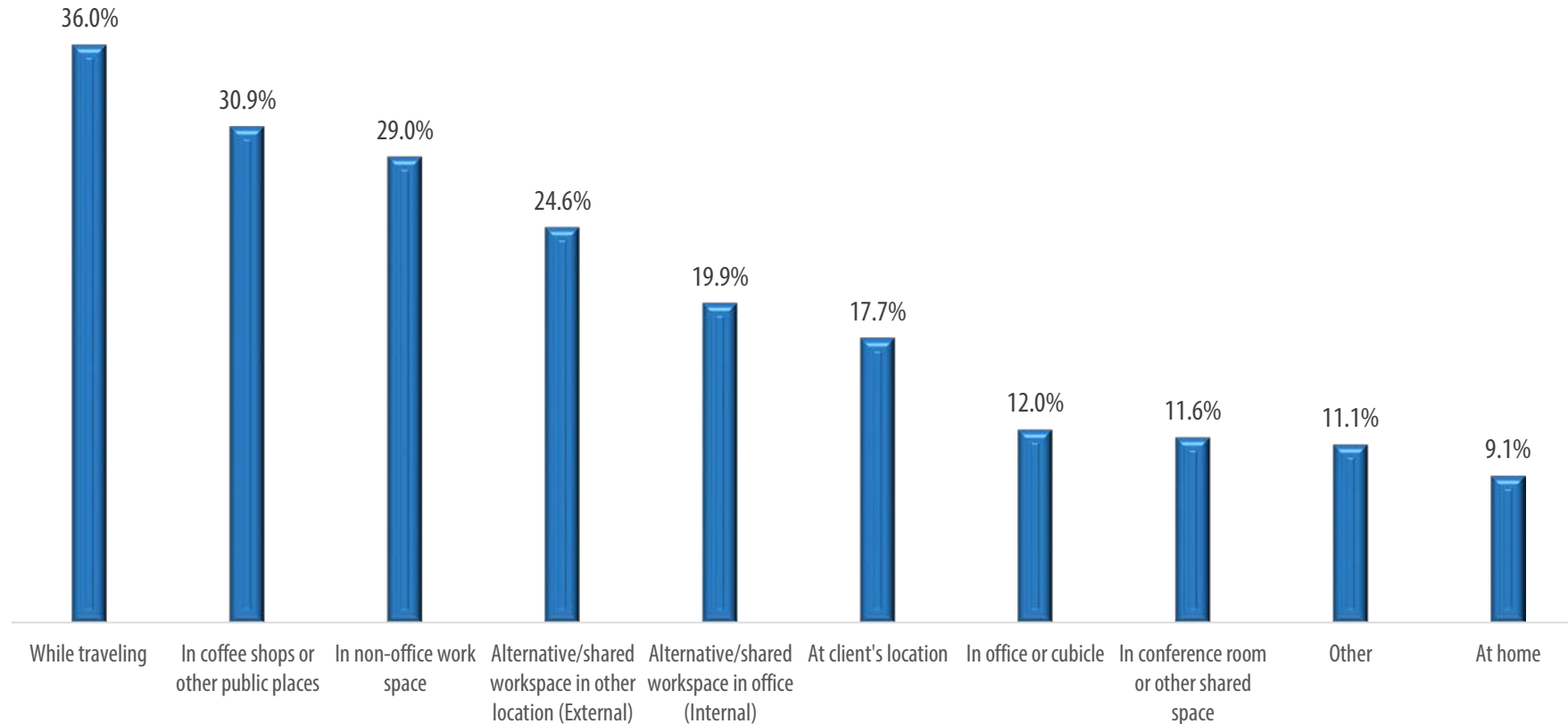
46

Percent
Time spent in
office/cube

Most Desired Benefits
Work Time Flexibility
Up-to-Date Devices
Workplace Flexibility
Up-to-Date Messaging Platforms
CYOD (Choose Your Own Device) Program



Noise is a Productivity Killer



In ¼ of external shared workspaces and 1/5 of internal shared workspaces, noise seriously impacts productivity

At home, noise generally not a problem

Work Device Statistics

25%

Work Devices
Employee Owned



Top 5 Work Devices	% of Device Work Time
Work Desktop PC	48%
Work Laptop PC	11%
Personal Smartphone	7.5%
Work Tablet	5.6%
Personal Desktop PC	5.5%

29%

Percent
Owned by
Employees
Under 45

19%

Percent
Owned by
Employees
45+

Top 5 Work Platforms	% of Device Work Time
Windows	65%
Android	11%
iOS	10%
Cloud-Based	5%
MacOS	5%

65%

Microsoft Windows Share
Of Total Work OS



MOST COMMUNICATIONS STILL "OLD SCHOOL"

75% Communications with Co-Workers
Email, Phone, Text

Communication with Co-Workers (Top 5)	
Email	38.5%
Phone	25.2%
Texting	11.6%
Instant Messaging	7.7%
Social Media	5.3%

Communication with Outside Contacts (Top 5)	
Email	33.7%
Phone	32.1%
Texting	12.2%
Social Media	6.5%
Instant Messaging	5.1%

COMMUNICATIONS WITH OUTSIDE CONTACTS

66% Of All External Communications
Email or Phone

COMMUNICATIONS DIFFERENCES WITH YOUNGER WORKERS NOT DRAMATIC

58%

Percentage Workers Under 45 Spent on
Email and Phone
Versus Average of 64%

MILLENNIALS LIKE TO TALK

Percentage of 18-24 Year Old Communications With Co-Workers
Using Phones
Higher than 25-44 Age Group
Similar to 45-54 Group

PERSISTENT CHAT USAGE STILL VERY LOW

4%

Employees Who Use
Tools Like Slack
To Communicate with Co-Workers

MOST COLLABORATION STILL BASIC

47%

Collaboration with Co-Workers
Emailing Documents
Or Using Shared Network Drive

**Collaboration with Co-Workers
(Top 5)**

Emailing Documents	34.6%
Shared Network Storage (e.g. SharePoint)	12.4%
Don't Collaborate Digitally	11.9%
Remote Real-Time Collaboration	10.2%
Local Real-Time Collaboration	8.6%

**Collaboration with Outside Contacts
(Top 5)**

Emailing Documents	37.5%
Don't Collaborate Digitally	19%
Remote Real-Time Collaboration	7.9%
Local Real-Time Collaboration	7.6%
Exchange Documents via Messaging Platform	7.2%

CLOUD-BASED STORAGE COLLABORATION LOW

8%

Collaboration Using Cloud Storage
Co-Workers

7%

Outside Contacts



COLLABORATION WITH CO-WORKERS

35% *Still Primarily Old School*
Emailing Documents

COLLABORATION WITH CLIENTS/OUTSIDE CONTACTS

Don't Use Any
19% **Collaboration**
Methods
With Clients and
Outside Contacts

LITTLE USAGE OF MODERN COLLABORATION TOOLS

19% *Use Real-Time*
Document Collaboration
Tools
With Co-Workers

MOST CONFERENCE ROOMS STILL BASIC

<30% Organizations With Advanced Collaboration Tools in Conference Rooms

Conference Room Services (Top 5)	
Audio Conferencing	50%
Open Guest WiFi	48%
Wireless Projectors	38%
Basic Videoconferencing	37%
HD Videoconferencing	30%

Highest Quality Services (Top 5)	
HD Videoconferencing	63%
Large Interactive Screens	58%
Electronic/Digital Whiteboards	55%
Dedicated Collaboration Computing Devices	51%
Open Guest WiFi	48%

ADVANCED TOOLS HAVE HIGHEST PERCEIVED QUALITY

1.8x

HD vs. SD Videoconferencing
Perception of High
Quality Service

COLLABORATION TOOLS ONLY MODESTLY USED

2.8

Rating of Very Infrequent (1) to Very Frequent (5)
Usage of Collaboration
Hardware and Software

AGE GAP NOTICEABLE

3.1 vs. 2.4

Collaboration Tool Usage
Younger vs. Older
Generational Differences
18-44 vs. 45+

TOP "WISHED FOR" WORK SERVICE

35%

Total Employees Who Want
Software/IOT Tools
For Controlling Their Physical Environments
(Temperature, Lights, etc.)

Key Findings



- Most companies still have work environments, policies and tools rooted in the past
 - Only small percentage of companies actually embracing future workplace trends
- People want to and expect to work less in offices and cubicles, but their preferred environment isn't alternative workspaces, it's working at home
- Some open-space office experiments seem to be failing
 - Basic concerns around noise and interruptions lead to decreased productivity
- Increasingly flexible device and collaboration options let people work from anywhere
 - In the office and outside, people want flexible tools
- Work time flexibility more important than workspace flexibility
 - Increases desire to work from home
- The age gap between employee work styles is real, but not as big as often assumed
 - Biggest differences are generational (18-44 vs. 45+)
 - In several instances, youngest group (18-24) actually closer to older workers (55-64) in terms of preferences
- Email and phone calls still far outweigh other methods of communication and collaboration
 - Even with younger workers
- Overall collaboration software and hardware tool usage is low and most is very basic
 - Less than 25% use more progressive, future-looking methods internally and the number is lower externally
 - Those who do, however, are much more satisfied with quality and effectiveness

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For additional information and complete survey results, a 99-slide version of this report is available.



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