



# Workplace of the Future: Progress, But Slowly

Bob O'Donnell, President and Chief Analyst



# 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

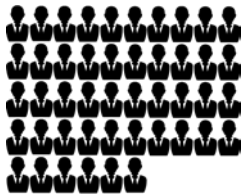
43

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

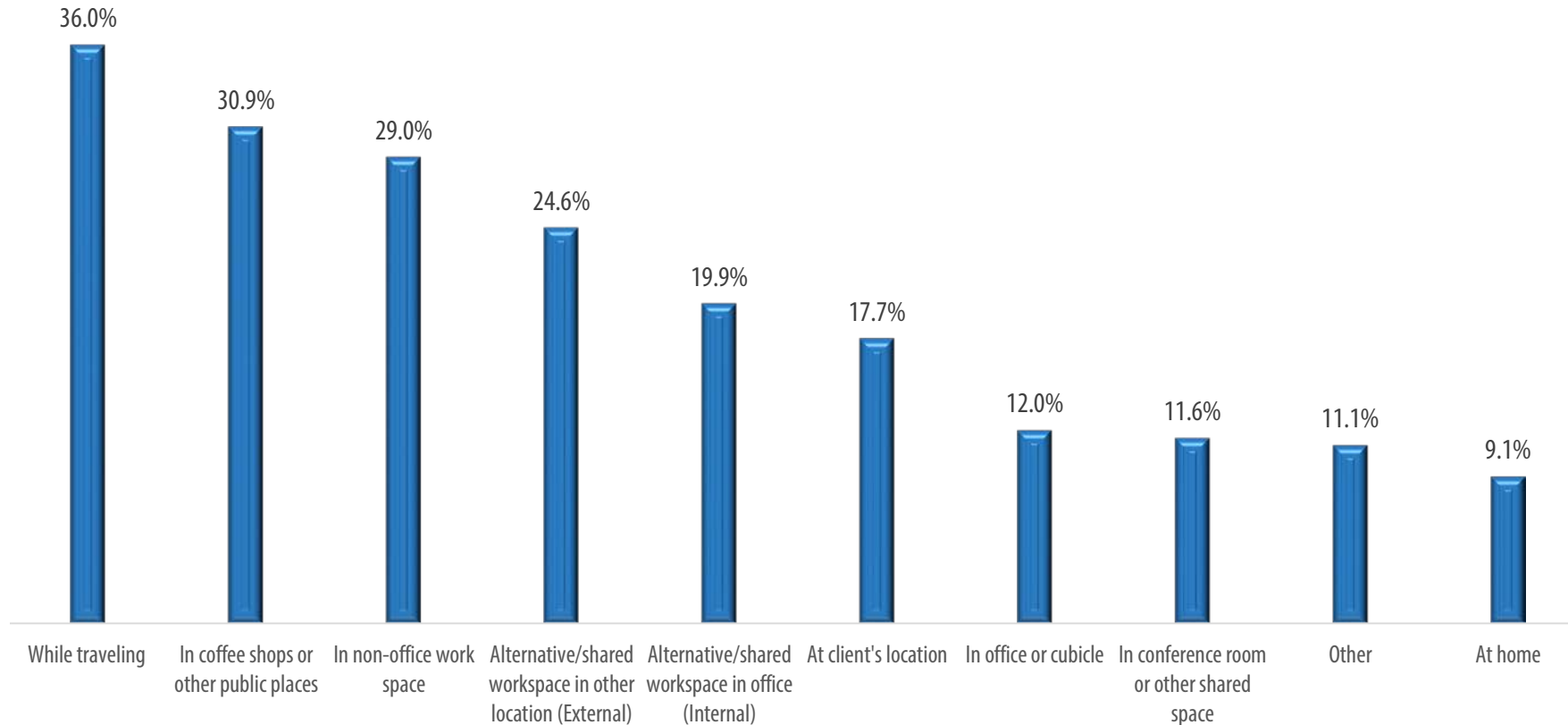
Workplace Flexibility

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



# Contact



Bob O'Donnell  
President and Chief Analyst  
TECHanalysis Research, LLC  
1136 Halsey Blvd.  
Foster City, CA 94404

[bob@technalysisresearch.com](mailto:bob@technalysisresearch.com)

(650) 224-2355

[@bobodtech](https://www.instagram.com/bobodtech)

[www.technalysisresearch.com](http://www.technalysisresearch.com)

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



**technalysis**  
RESEARCH