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

46 Percent Time spent in office/cube

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

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

### Top 5 Work Devices

<table>
<thead>
<tr>
<th>Device Type</th>
<th>% of Device Work Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Desktop PC</td>
<td>48%</td>
</tr>
<tr>
<td>Work Laptop PC</td>
<td>11%</td>
</tr>
<tr>
<td>Personal Smartphone</td>
<td>7.5%</td>
</tr>
<tr>
<td>Work Tablet</td>
<td>5.6%</td>
</tr>
<tr>
<td>Personal Desktop PC</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

### Top 5 Work Platforms

<table>
<thead>
<tr>
<th>Platform Type</th>
<th>% of Device Work Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>65%</td>
</tr>
<tr>
<td>Android</td>
<td>11%</td>
</tr>
<tr>
<td>iOS</td>
<td>10%</td>
</tr>
<tr>
<td>Cloud-Based</td>
<td>5%</td>
</tr>
<tr>
<td>MacOS</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Additional Data

- **25%** Work Devices are owned by employees.
- **29%** Percent of work devices owned by employees under 45.
- **19%** Percent of work devices owned by employees 45+.
- **65%** Microsoft Windows Share of total work OS.
- **Technalysis Research**
MOST COMMUNICATIONS STILL “OLD SCHOOL”

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

<table>
<thead>
<tr>
<th>Communication with Outside Contacts (Top 5)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>33.7%</td>
</tr>
<tr>
<td>Phone</td>
<td>32.1%</td>
</tr>
<tr>
<td>Texting</td>
<td>12.2%</td>
</tr>
<tr>
<td>Social Media</td>
<td>6.5%</td>
</tr>
<tr>
<td>Instant Messaging</td>
<td>5.1%</td>
</tr>
</tbody>
</table>

Communications with Outside Contacts

Of All External Communications
Email or Phone

66%
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

28% 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
Collaboration with Co-Workers

MOST COLLABORATION STILL BASIC

47% Emailing Documents
Or Using Shared Network Drive

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

Collaboration Using Cloud Storage

Co-Workers

8%

Outside Contacts

7%
COLLABORATION WITH CO-WORKERS

35% Still Primarily Old School Emailing Documents

LITTLE USAGE OF MODERN COLLABORATION TOOLS

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

COLLABORATION WITH CLIENTS/OUTSIDE CONTACTS

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

technalysis RESEARCH
### MOST CONFERENCE ROOMS STILL BASIC

<30% Organizations With Advanced Collaboration Tools in Conference Rooms

### Highest Quality Services (Top 5)

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>HD Videoconferencing</td>
<td>63%</td>
</tr>
<tr>
<td>Large Interactive Screens</td>
<td>58%</td>
</tr>
<tr>
<td>Electronic/Digital Whiteboards</td>
<td>55%</td>
</tr>
<tr>
<td>Dedicated Collaboration Computing Devices</td>
<td>51%</td>
</tr>
<tr>
<td>Open Guest WiFi</td>
<td>48%</td>
</tr>
</tbody>
</table>

### Conference Room Services (Top 5)

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio Conferencing</td>
<td>50%</td>
</tr>
<tr>
<td>Open Guest WiFi</td>
<td>48%</td>
</tr>
<tr>
<td>Wireless Projectors</td>
<td>38%</td>
</tr>
<tr>
<td>Basic Videoconferencing</td>
<td>37%</td>
</tr>
<tr>
<td>HD Videoconferencing</td>
<td>30%</td>
</tr>
</tbody>
</table>

### ADVANCED TOOLS HAVE HIGHEST PERCEIVED QUALITY

1.8x HD vs. SD Videoconferencing

Perception of High Quality Service
COLLABORATION TOOLS ONLY MODESTLY USED

Rating of Very Infrequent (1) to Very Frequent (5)

Usage of Collaboration

Hardware and Software

2.8

AGE GAP NOTICEABLE

Collaboration Tool Usage

Younger vs. Older

Generational Differences

18-44 vs. 45+

3.1 vs. 2.4

TOP “WISHED FOR” WORK SERVICE

Total Employees Who Want

Software/IOT Tools

For Controlling Their Physical Environments

(Temperature, Lights, etc.)

35%
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.