

THE FUTURE OF WORK

DECEMBER 2018



OBJECTIVES

- Assess the mindset of the modern worker and analyze behaviors & trends in the workplace among business professional employees and managers
- Dive into market-specific topics to provide some level of localized findings for a truly global audience
- Provide annual 'Future of Work' resources and stats for thought leaders, influencers, and press

RESEARCH DETAILS

MARKETS & SAMPLE SIZE



SAMPLE

- 21+ year-olds (*ages match individual country fallout*)
- Full-time/part-time or self-employed
- Work in an office environment at least sometimes
- Managers (*25% of each market*):
 - Have shared/sole decision making power for financial or personnel decisions

METHOD

- All markets fielded November 8th-26th, 2018
- 15-minute device agnostic online survey

BIG FINDINGS

AND WHO THEY ARE MOST TRUE FOR

80%

Are optimistic about the upcoming year at work

Skews **Managers** and those **not in an open office**

73%

State having a flexible work schedule is important

Skews **younger** age 21-34

62%

Report they are satisfied with their job

Skews **Male, Managers,** and those **not in an open office**

48%

Prefer to work in an office environment

Skews **Older** age 55+

Q16: How much do you agree or disagree with: I am generally optimistic about my next year at work / Q11: How important is it to have a flexible work schedule when considering a place to work? / Q1: Overall, how satisfied are you with your current job? / Q6: Which of the following work spaces do you prefer?

Base: All (3324)

What makes people happy at work?



Make sure their work space is **satisfactory**
Job and work satisfaction are highly correlated

Allow workers to be remote
at least once a week



Offer at least **three** different perks

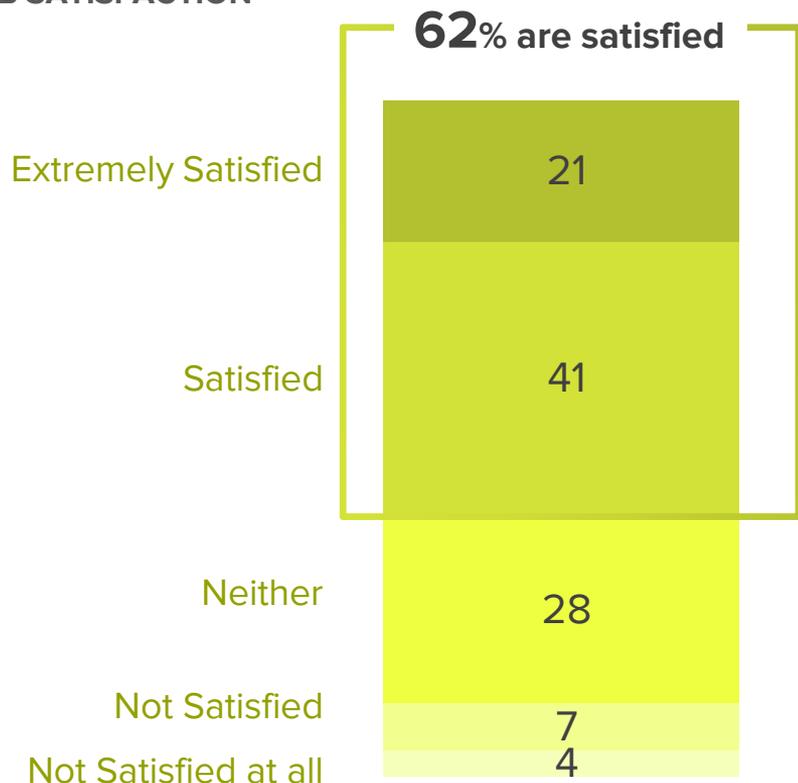
- A **flexible** work schedule
- **Stocked** kitchen
- Travel **opportunities**

Promote **flexible**
work hours

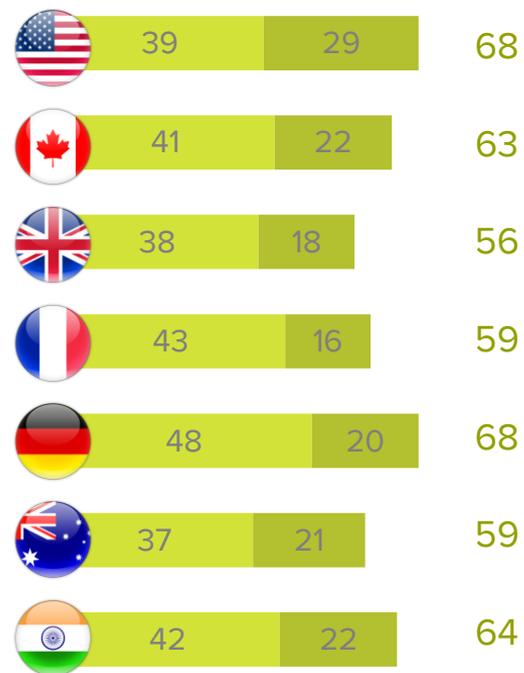


Overall, people are pretty happy with their job

JOB SATISFACTION



■ Satisfied ■ Extremely Satisfied

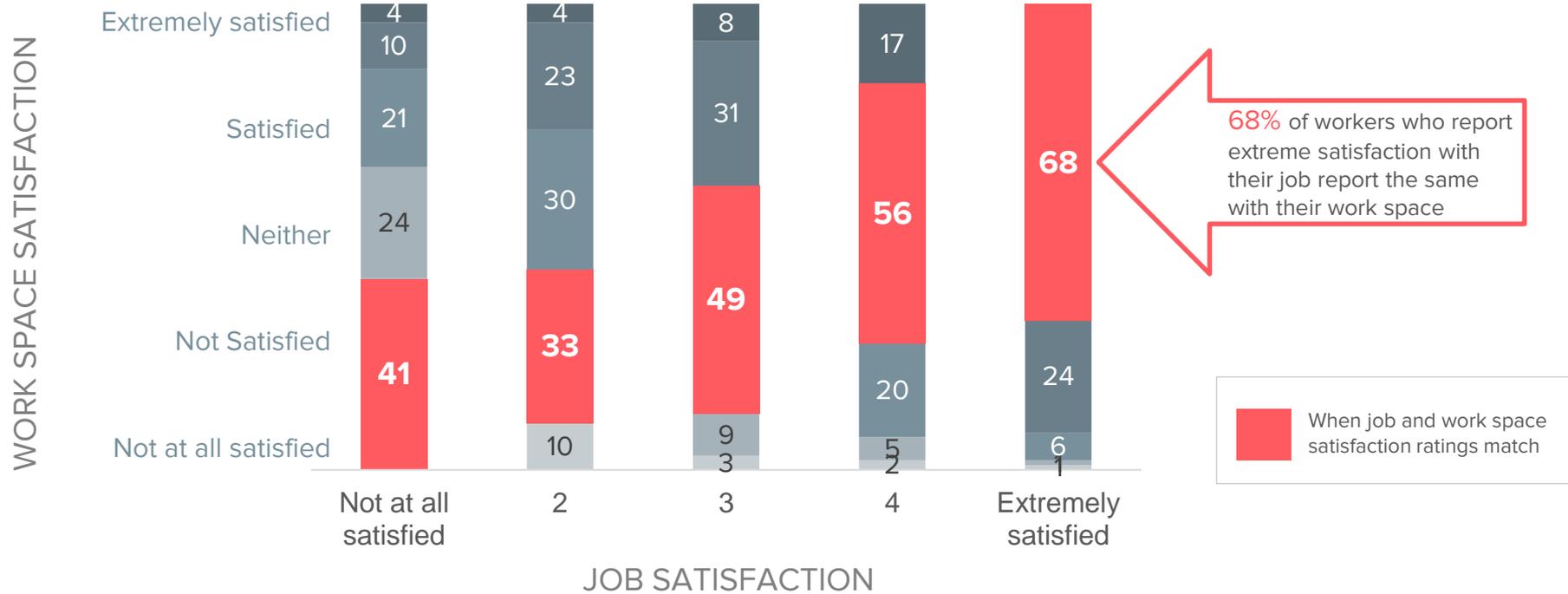


Q1: Overall, how satisfied are you with your current job?

Base: All (3324)

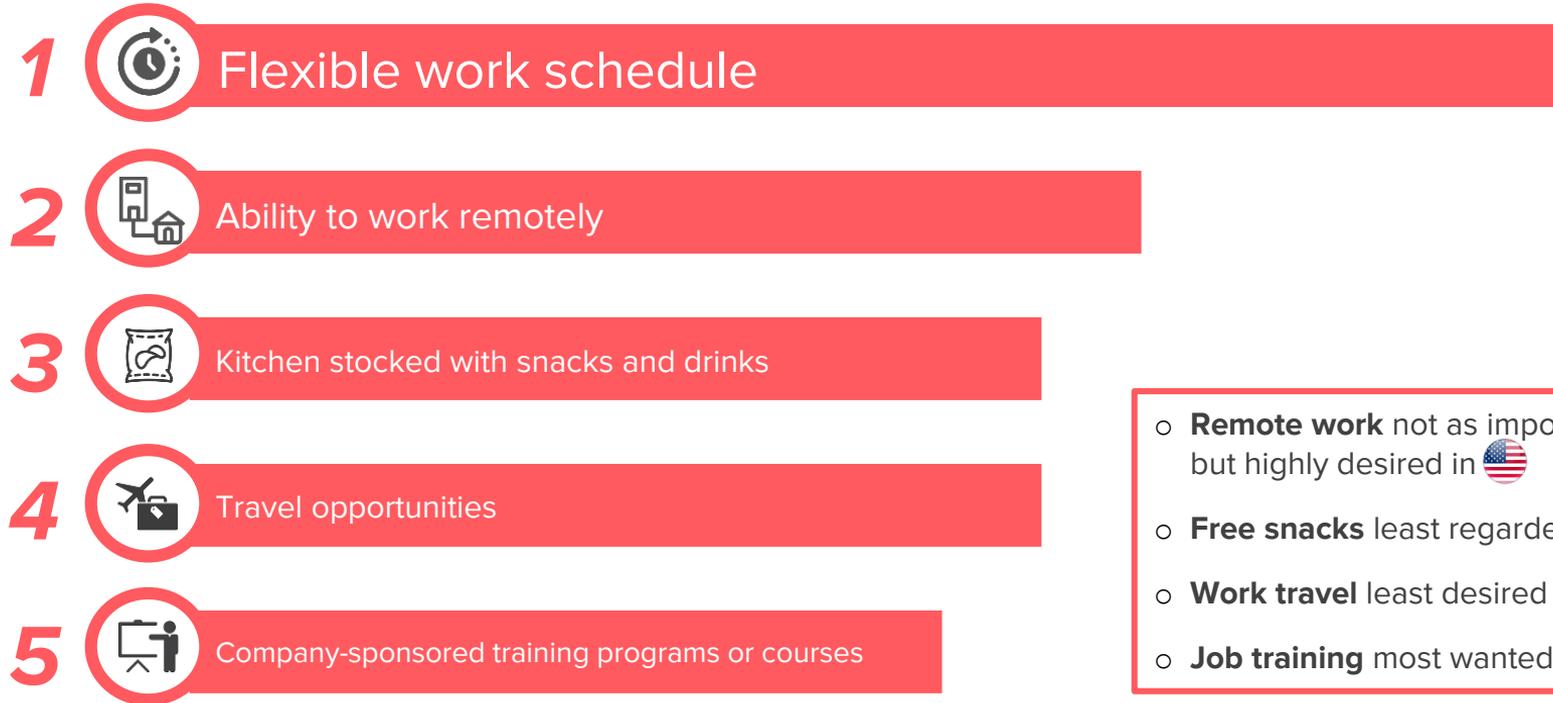
Satisfaction with a job and the work space are connected

JOB AND WORK SPACE SATISFACTION



Flexibility, free snacks, travel and training opportunities keep employees happy

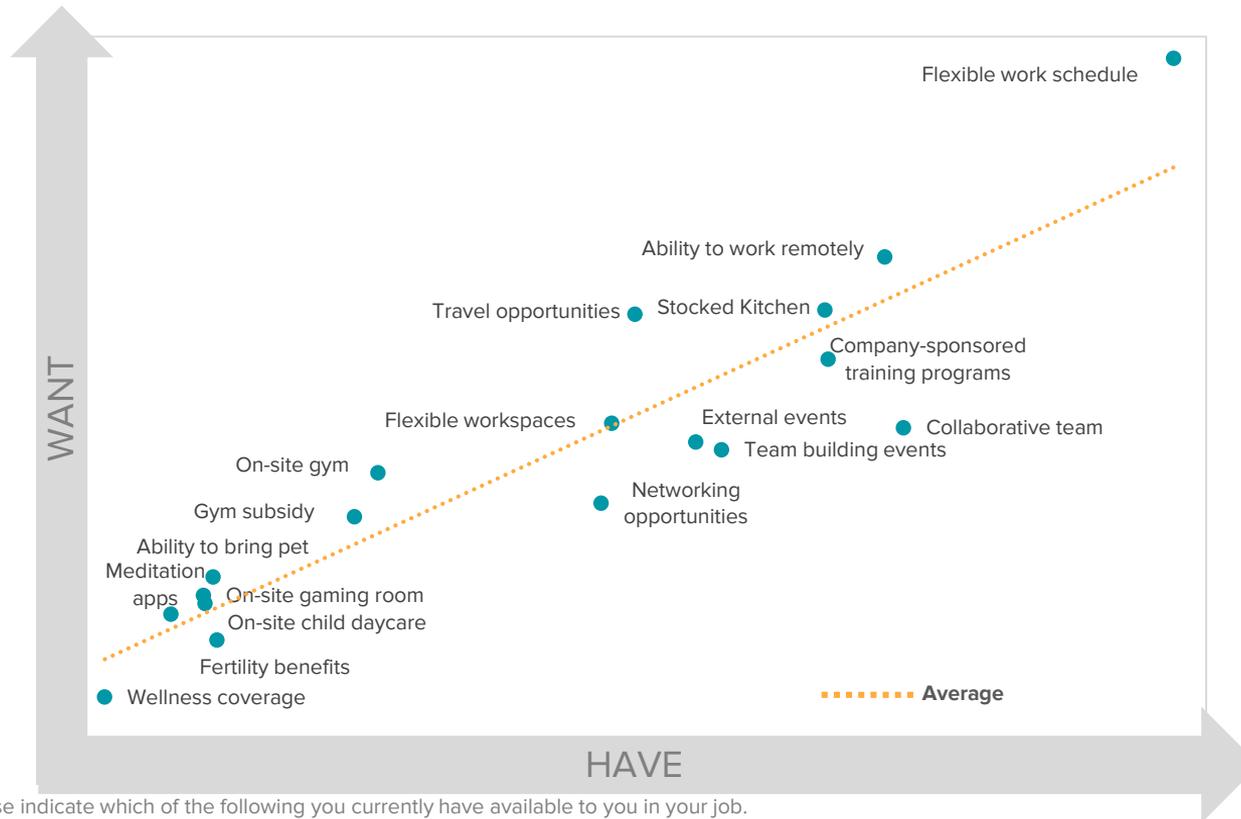
TOP 5 PERKS TO RETAIN TALENT



- **Remote work** not as important in  but highly desired in 
- **Free snacks** least regarded in 
- **Work travel** least desired in 
- **Job training** most wanted in  and 

Giving more flexibility and 'discounts' over development opportunities will help employee retention

OFFERINGS CURRENTLY HAVE VS WANT



Managers are more likely to want... (vs non-managers)

- On-site day care
- On-site gaming room
- Meditation apps
- Fertility benefits
- Bringing pet to work
- Networking events

While non-managers want more of... (vs managers)

- Flexible work schedule
- Remote work
- Stocked kitchen
- Gym subsidy

Q12: Please indicate which of the following you currently have available to you in your job.

Q13: Looking at the list below, please select the top five items which would be the most helpful to keep you happy in your current job.

Base: All (3324)

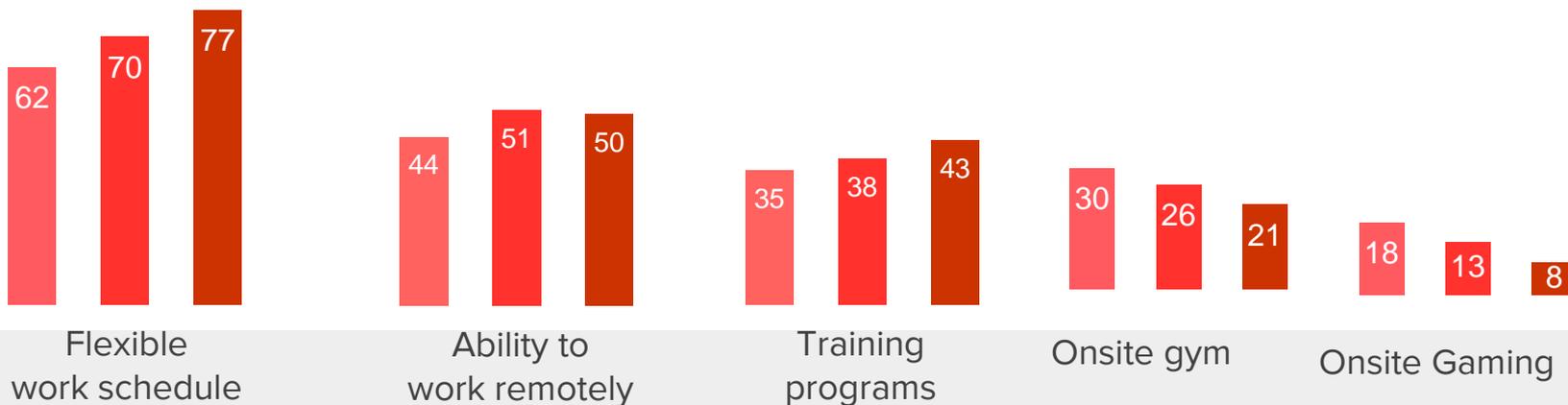
As age increases, work preferences evolve

PERK APPEAL AND AGE



Older employees care more about flexibility, working remote and training

While the younger ones need more of physical and mental exercise while at work

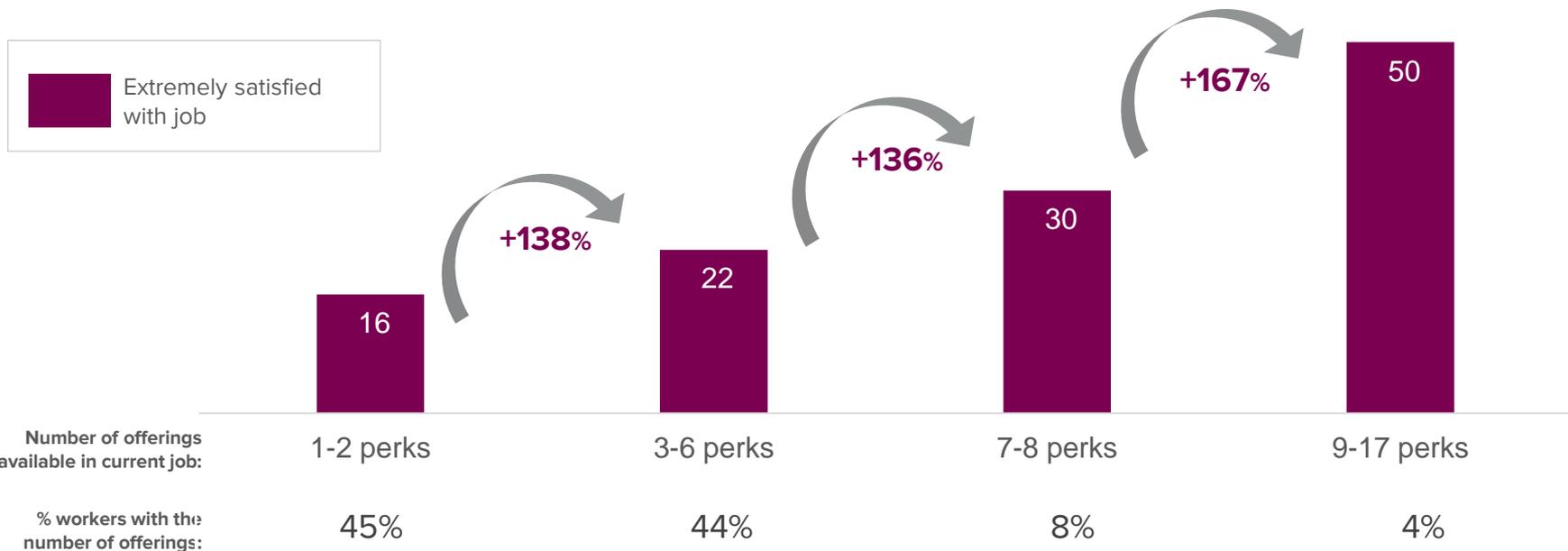


Q13: Looking at the list below, please select the top five items which would be the most helpful to keep you happy in your current job.

Base: 21-34 (1023), 35-54 (1647), 55-80 (654)

Increasing the amount of perks translates to a morale boost

CURRENT OFFERINGS AND SATISFACTION



Percent increase is calculated by: higher offerings satisfaction / lower offerings satisfaction

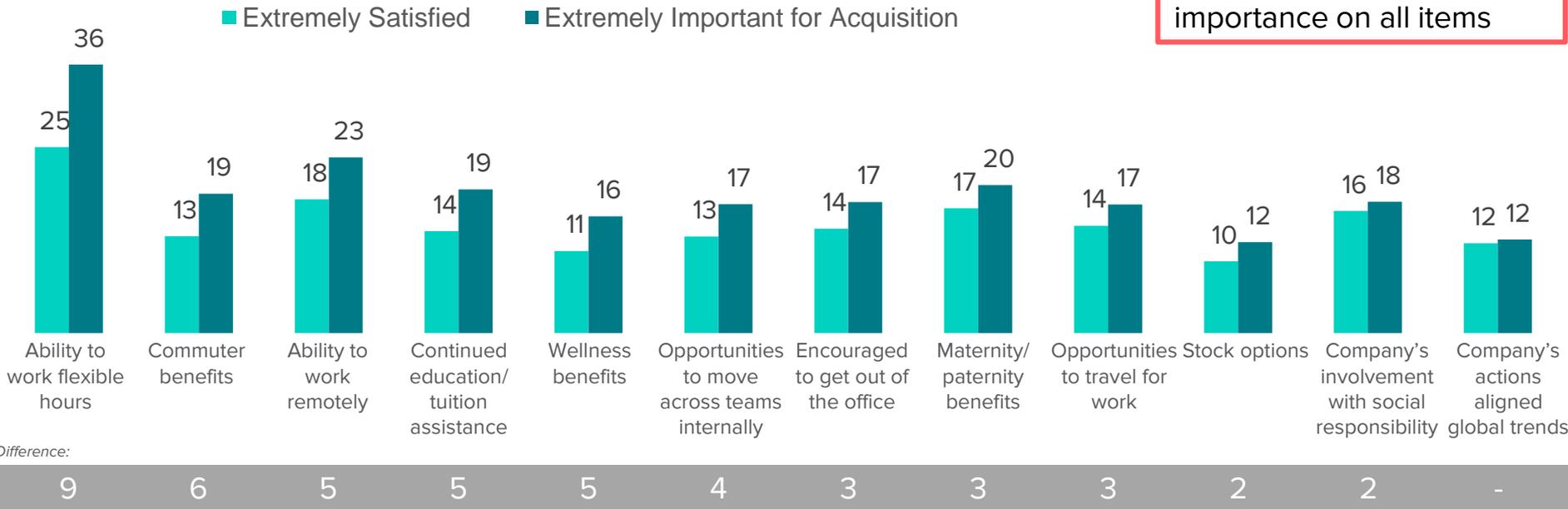
Q1: Overall, how satisfied are you with your current job? / Q12: Please indicate which of the following you currently have available to you in your job.

Base: All (3324)

Workers expect more from a new company than they currently receive, especially when it comes to flexibility

CURRENT SATISFACTION AND NEW ACQUISITION IMPORTANCE

Mangers are more satisfied with what they have and also place a higher importance on all items



Difference:

Data is sorted on biggest gap between importance and satisfaction

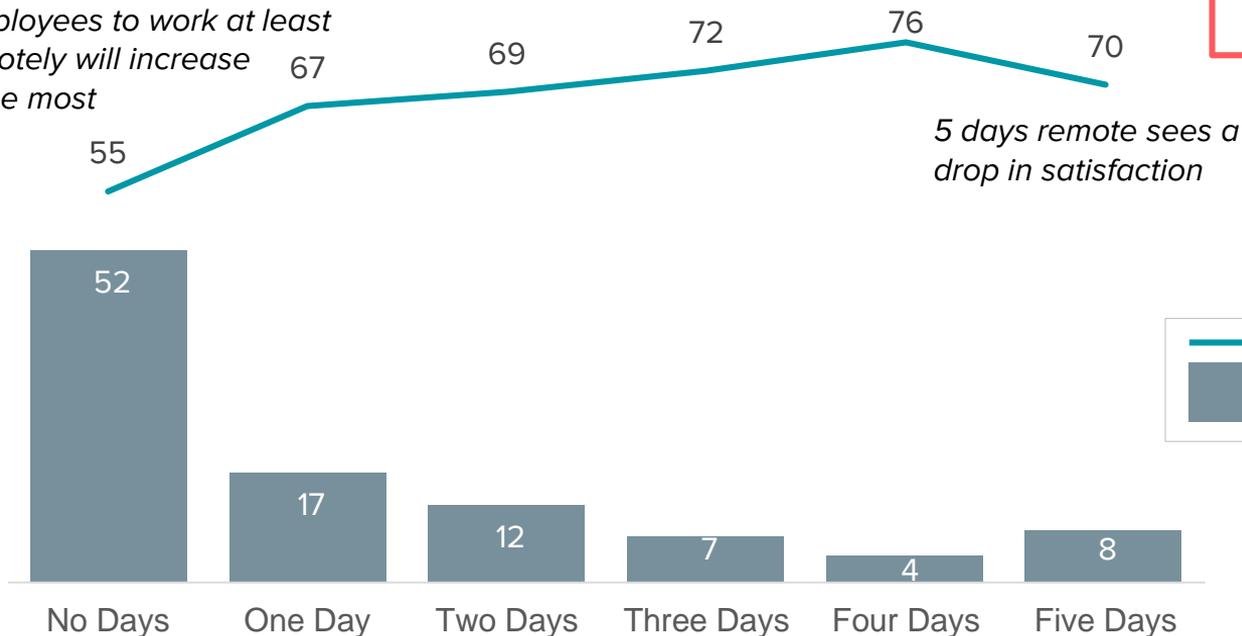
Q10: Please indicate how satisfied you are with each of the following at your current company. / Q11: How important are each of the below for you when it comes to considering a place to work at?

Base: All (3324)

Despite wanting to, most employees are not able to work remotely at all

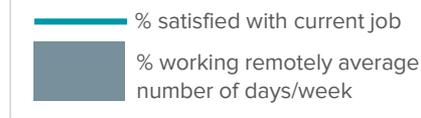
WORKING REMOTELY AND SATISFACTION

Allowing employees to work at least one day remotely will increase happiness the most



India and Germany are more likely to have 1+ day remote

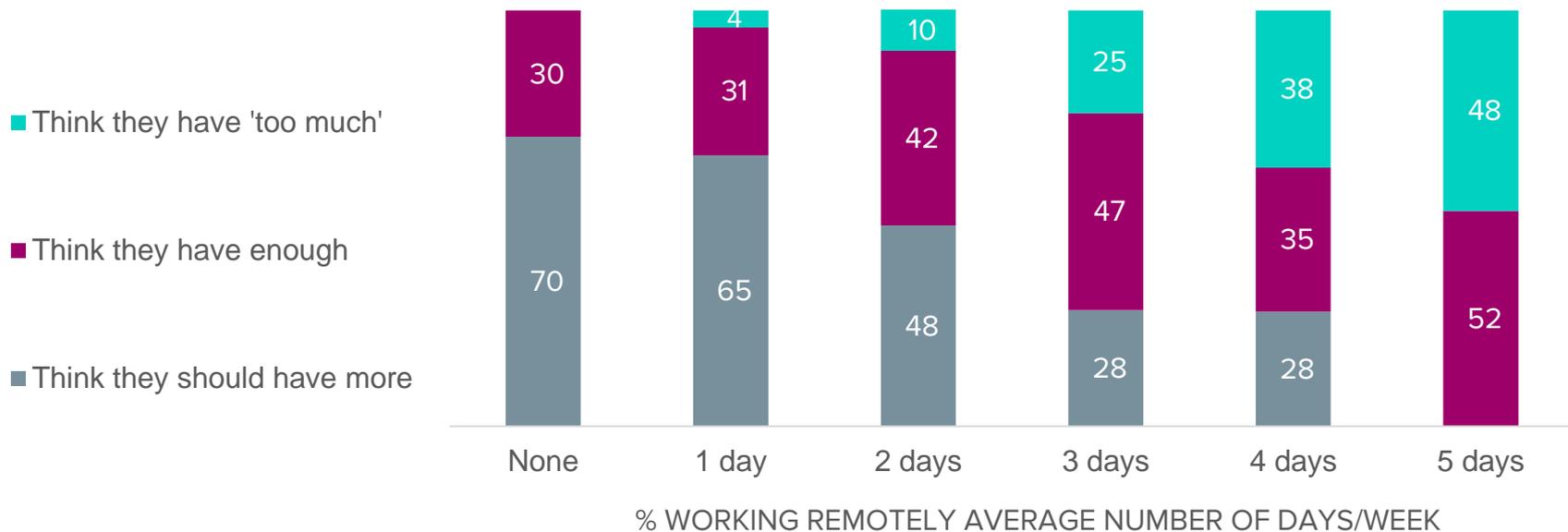
5 days remote sees a drop in satisfaction



Workers who are remote 2-3 days are likely to think they have the right amount

WORKING REMOTE DAYS ALIGNMENT

Workers want **2** days a week to work remotely on average



Q14: On average, how many days a week do you work remotely? This means working in an environment other than a central office location.

Q14a: How many days should offices allow employees to work remotely?

Base: All (3324)

Where are employees working and how do they feel about it?

A woman with braids is smiling and talking to another woman in front of a colorful mural. The mural features a woman's profile, a palm tree, and various plants. The text is overlaid on the image.

OFFICE SPACES MATTER

OVER HALF

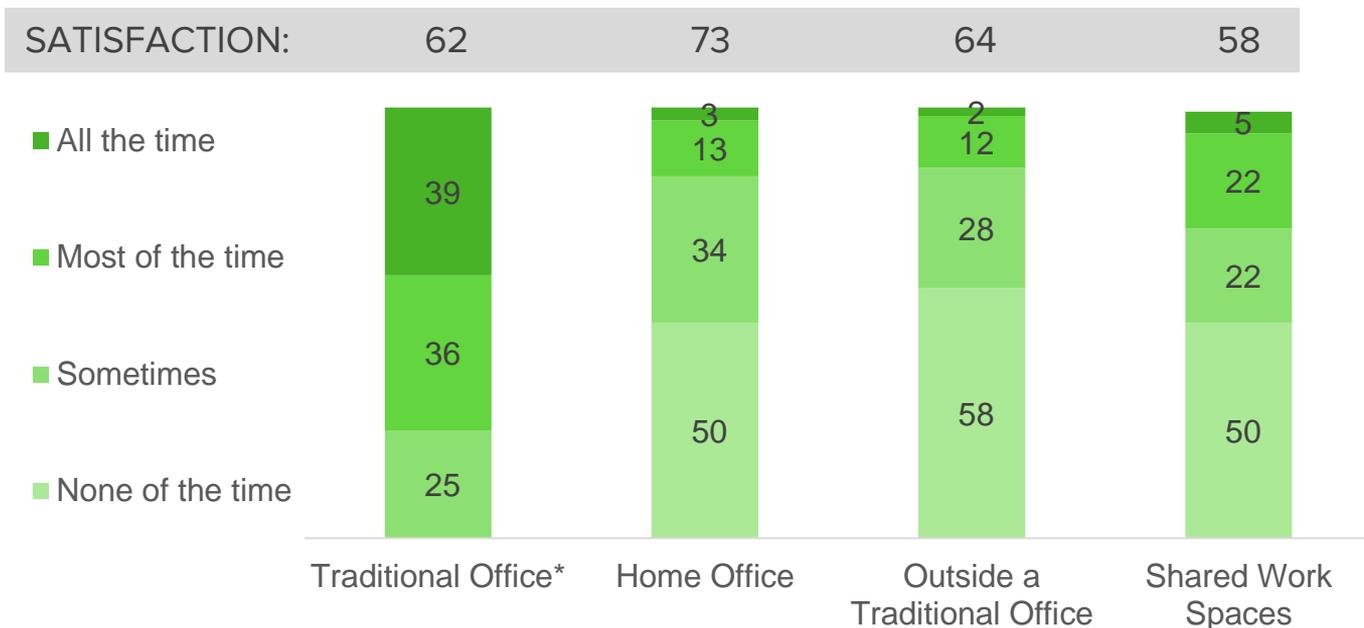
think privacy/personal space
is important to happiness in
the workplace

2 IN 5

consider the office space
as an indication of how
much they are valued

Workers are still primarily working in traditional office settings, but working at home brings the highest satisfaction

WORK PLACE USE AND SATISFACTION



US and Canada are most likely to work full time in a traditional office; with Germany and India least likely.

UK, France and Australia report the lowest satisfaction with the traditional office.

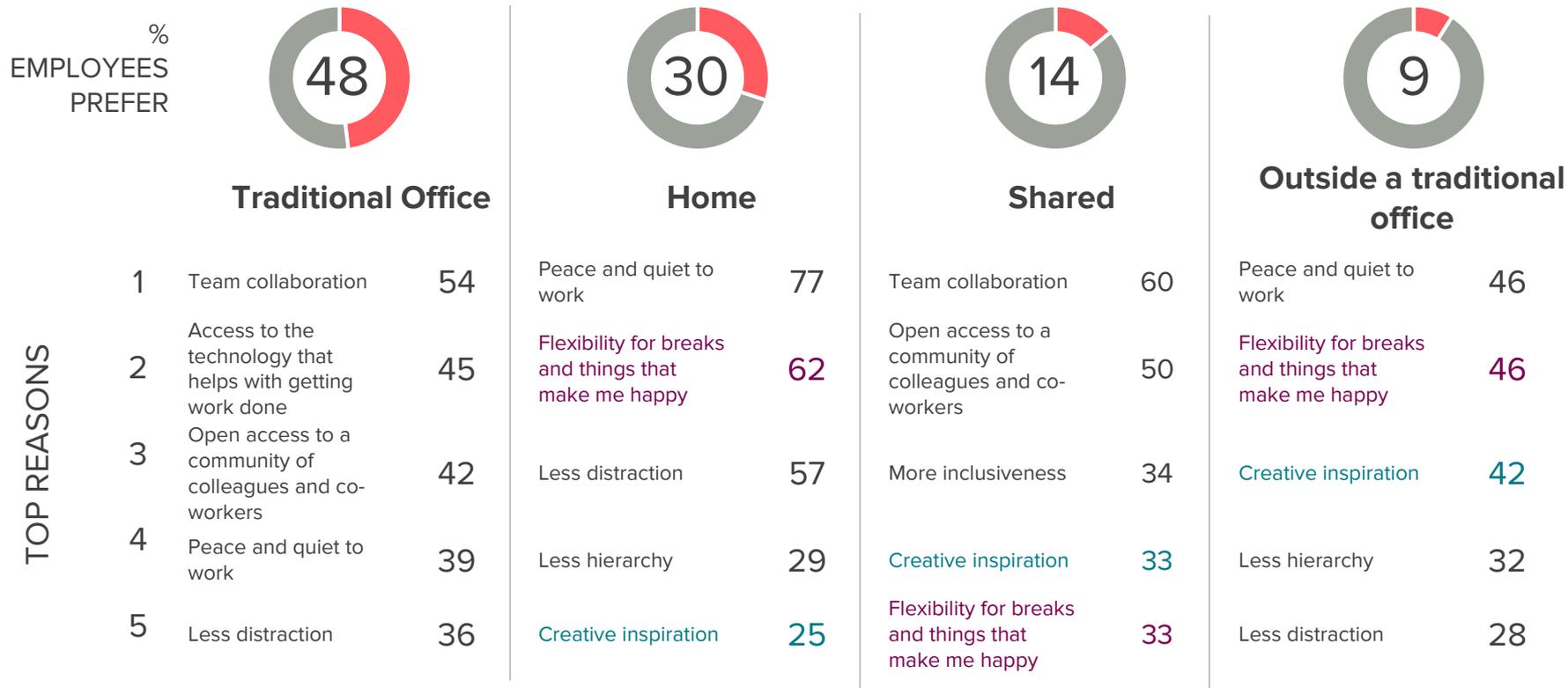
*Note that it was a requirement for the study to work in a traditional office at least sometimes

Q1: How much do you work at each of the work spaces in your current job? / Q4: Earlier you mentioned you work in <insert work space>, how satisfied are you with this work space?

Base: All (3324) / Work in Specific Work Space (bases vary)

While traditional offices are preferred most often, workers seek other spaces for flexibility and creative inspiration

WORK SPACE PREFERENCES AND REASONS



Q6: Which work space would you prefer to work in the most? / Q7: And why do you prefer to work in <insert preferred work space>?

Base: All (3324) / Prefer to Work in Specific Work Space (bases vary)

Success happens at the office, but other spaces are more creative

TOP 5 WORK SPACE PERCEPTIONS

Perceptions that are in every top 5

- Comfortable
- Productive
- Engaged

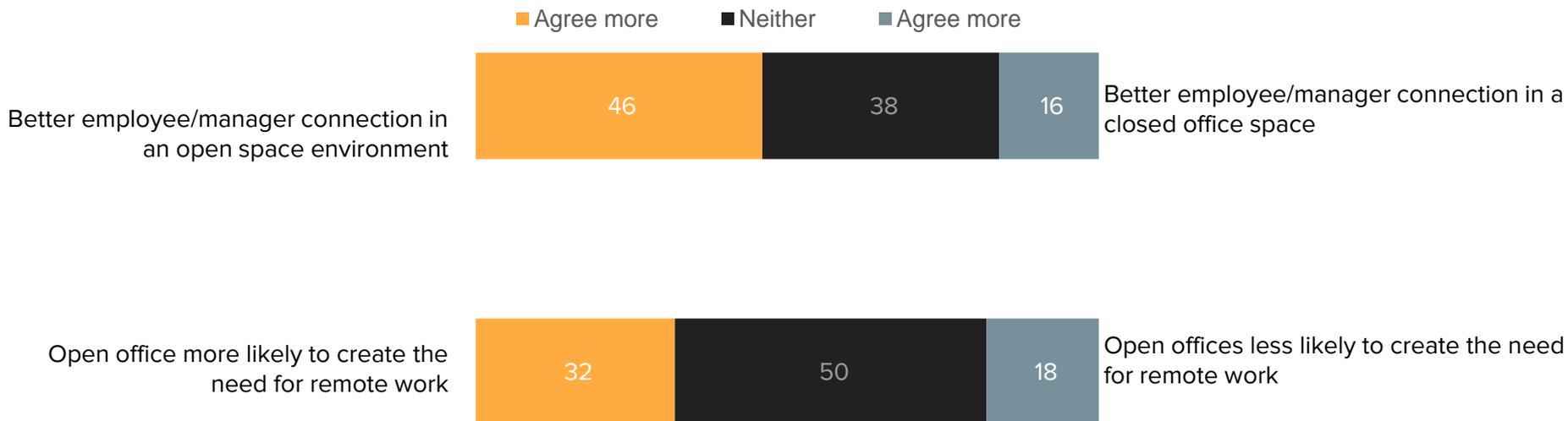


Q5: Please tell us how you feel when working in a <insert work space>. Please select up to 3 top feelings.
Base: Work in Specific Work Space (bases vary)

Open spaces foster better employee & manager connection, but half are uncertain if it leads to more remote work or not

OPEN SPACE ATTITUDES

Managers are more likely to think they have a better connection in an open office space



Employees already working in an open space see more benefits than those who do not

OPEN SPACE PERCEPTIONS AMONG THOSE WHO WORK IN IT VS NOT

*Open spaces are more likely to foster **team collaboration***

53% open space workers (vs 44%)

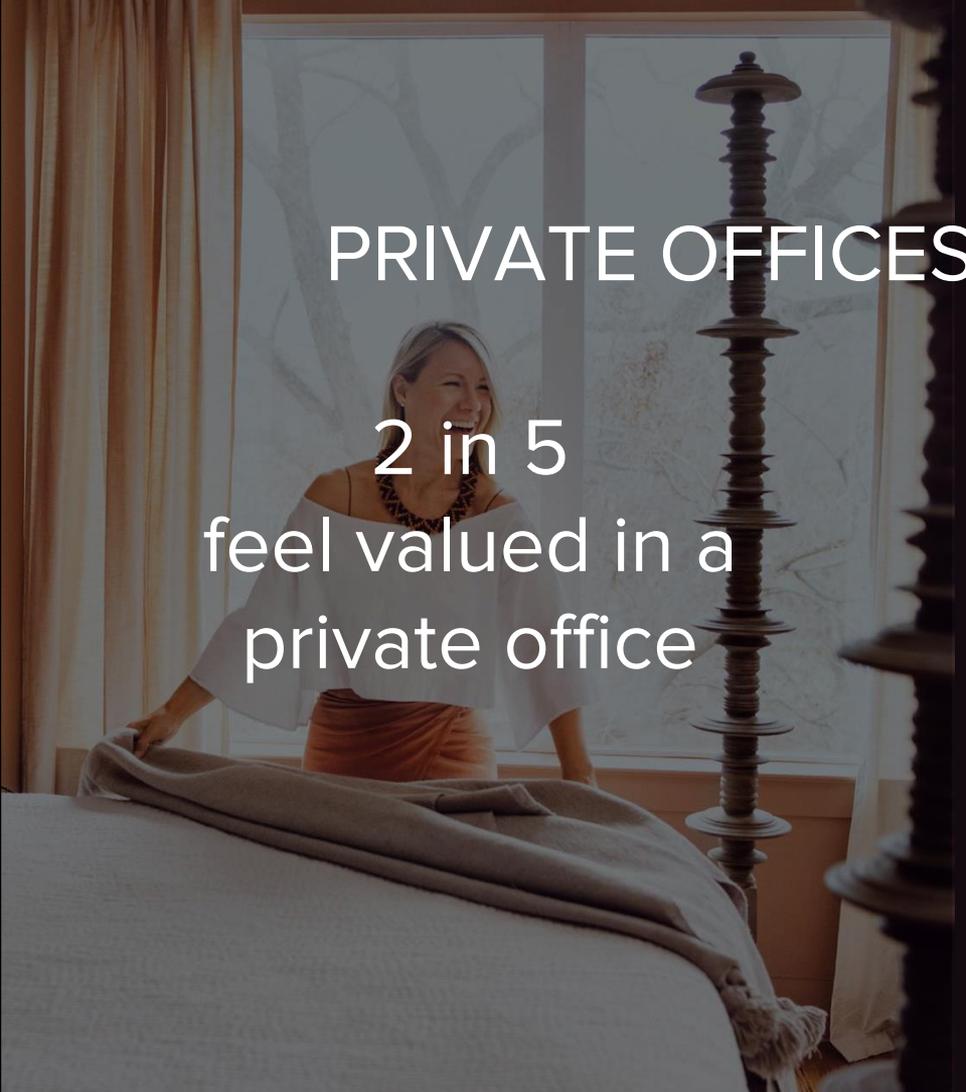
*I feel a **better connection to my manager** when working in an open space environment*

36% open space workers (vs 28%)

*Keeping **employees motivated** has become **less difficult** with open office environments*

30% open space workers (vs 25%)

Open vs. Private Working Spaces



PRIVATE OFFICES HOLD MEANING

2 in 5
feel valued in a
private office

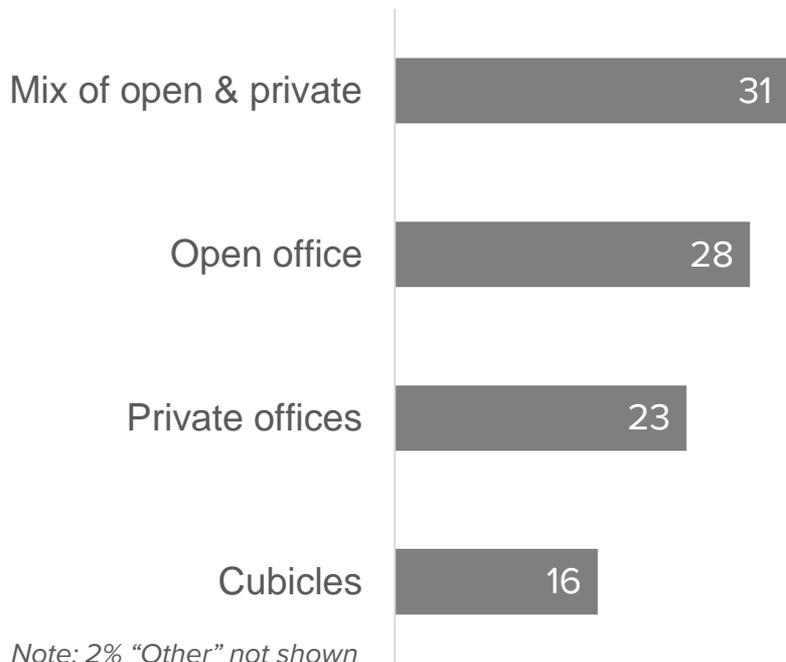


Half state private
offices are productive
and comfortable

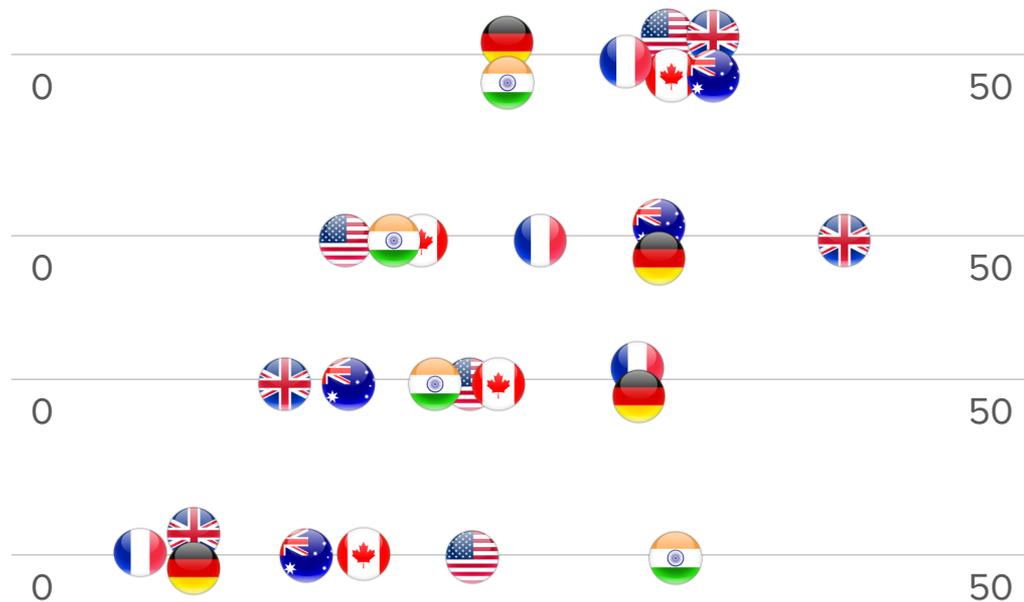
British workers are much more likely to be in an open office while Indian workers are most likely to work in cubicles

OFFICE PLAN DISTRIBUTION

GLOBAL OFFICE PLAN DISTRIBUTION



MARKET OFFICE PLAN DISTRIBUTION

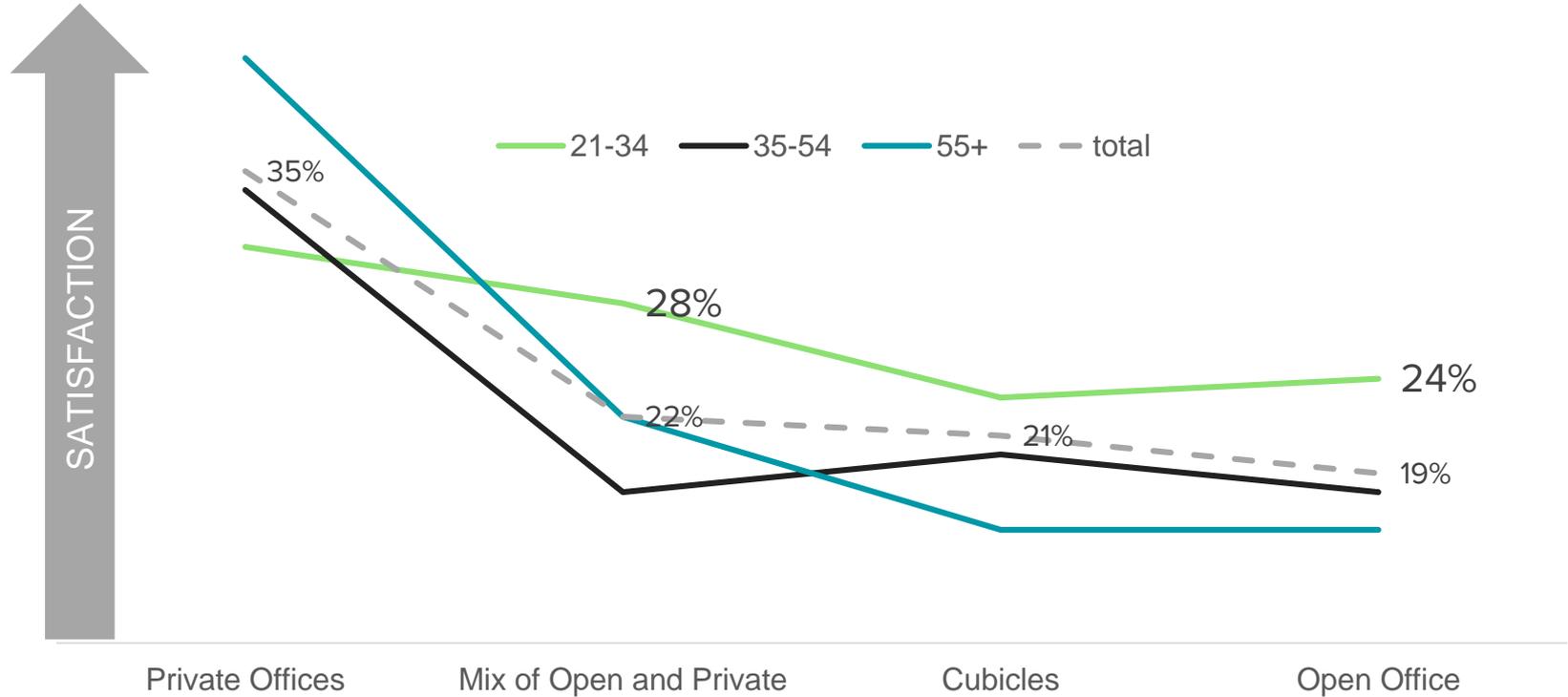


Q: How would you best describe the office floor plan that you work in?

Base: All (3324)

While private offices reap the highest satisfaction, open or a mix of spaces is appealing for 21-34 year-olds

OFFICE LAYOUT SATISFACTION BY AGE

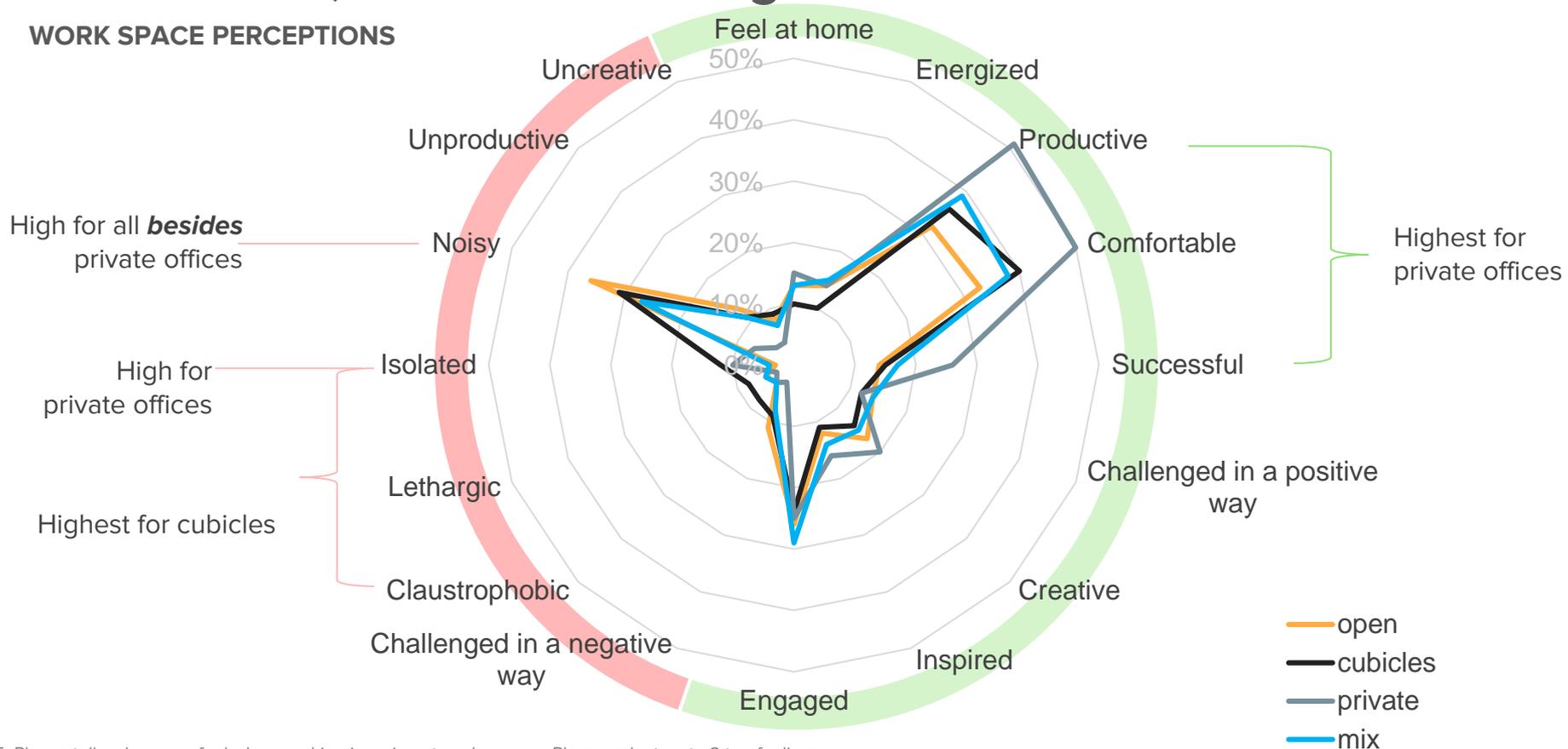


Q4: Earlier you mentioned you work in <insert work space>, how satisfied are you with this work space?

Base: Work in Specific Work Space (bases vary)

Private spaces are seen as the most productive and comfortable, but also isolating

WORK SPACE PERCEPTIONS

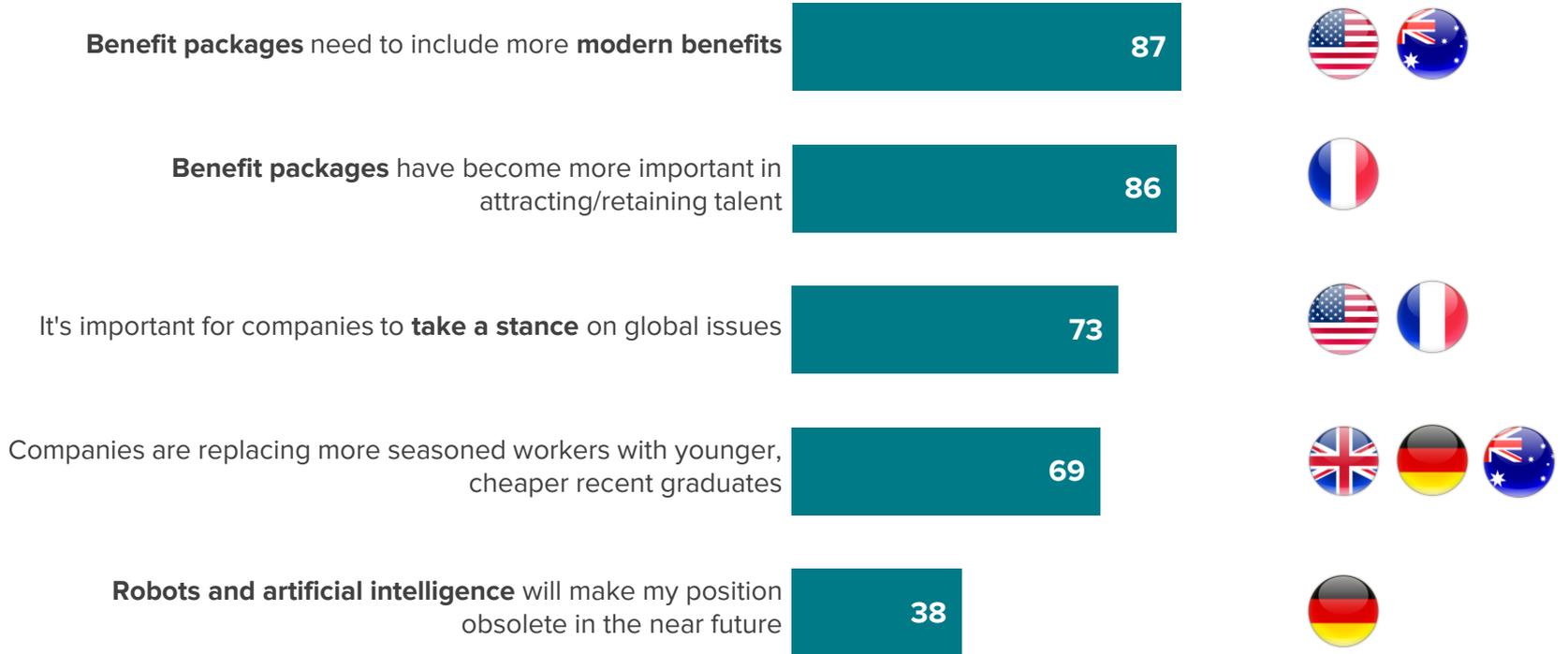


Q5: Please tell us how you feel when working in a <insert work space>. Please select up to 3 top feelings.
 Base: Work in Specific Work Space (bases vary)

**How do they feel about their work
and the future?**

Workers have strong feelings about benefit packages and expect their employers to take a stance on global issues

% AGREE WITH STATEMENT



Workers in large organizations expect more

% AGREE WITH STATEMENTS

Those in organizations with 100+ employees are more likely to think that...

87%

(vs. 83% small org)

Benefit packages need to include more **modern benefits**

(e.g., expanded parental leave, mental health benefits, sabbatical programs, in-office meals)

81%

(vs. 76% small org)

Companies need to provide **more remote options** to attract **talent**

75%

(vs. 70% small org)

It's important for companies to **take a stance on global issues**

(e.g., immigration, environmental policies)

6 in 10 are drawn to contingency/contract work for flexibility

CONTINGENT WORK AGREEMENT

*I am interested in **contract/contingency** work arrangement to attain more flexibility*

60% Global average
Lowest in  (42%)

This desire varies by age, level,
and even org size

Older employees and those in
large orgs look for more
stability

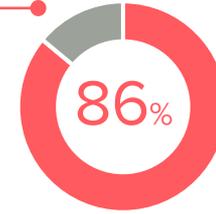
76% Managers
vs 56% non-managers

68% Adults age 21-34
vs 61% age 35-54 and 49% age 55+

64% Small/Mid size org employees
vs 56% 1000+ org employees

Managers indicate more optimism than Non-Managers about their next year at work....

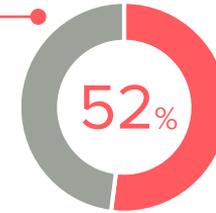
*I am **generally optimistic** about my next year at work*



(vs 78% non-Managers)

Yet, they are more prone to fearing a future where AI and robots will take over their position

***Robots and artificial intelligence** will make my position obsolete in the near future*



(vs 34% non-Managers)

Workers are currently spending roughly one-third of their time on projects

SHARE OF JOB

HIGHEST IN



Q17: Thinking about a typical work week during the past month, how are you spending time in your job? In the boxes below, please insert the percent of time you currently spend, so the total equals 100. Base: Total (3324)