Executive Summary

Ideas of flexible working have moved beyond the option to work from the office or from home, to being able to work anywhere. The reality of anywhere working, however, varies widely across companies and countries. To get a better understanding of the expectations of today’s workers and what the future of work holds for them, Polycom commissioned research on global trends and attitudes towards anywhere working. This paper summarises the key findings.

The research highlights that nearly two thirds of the global workforce currently take advantage of anywhere working. The most popular reported benefits of anywhere working are perceived to be its contribution to a better work-life balance and productivity, which topped the list among respondents.

The survey also reveals some common concerns about anywhere working, such as the fear of being perceived as less hardworking. It also reveals the difference between the approach to anywhere working of more experienced 45 – 60 year old employees and their millennial counterparts (18 – 30 years old).

For anywhere working to be successful, the right technology, in particular video collaboration technology, is crucial. One of the advantages of anywhere working is its ability to adapt to the individual and their needs. While this flexibility contributes to its effectiveness and appeal, there must be some core technology in place to make today’s vision a long-term reality.
**THE SHIFT FROM FLEXIBLE TO ANYWHERE WORKING**

Conversations about the role of flexible working in “the future of work” have shifted. It’s no longer enough to simply have the option of working from home or the office. We want to be able to work anywhere.

Primarily this expectation of anywhere working has been driven by millennials (18-34 year olds), who have grown up using mobile devices. However, attitudes are shifting across all age groups. Most of us have been using laptops, tablets or smartphones as essential parts of our daily lives for over two decades. Naturally, we expect to have the same mobility when it comes to our working life.

Organisations that want to attract and retain top talent in the fast-developing app economy need to adapt their culture and technology to accommodate this shift in attitudes. To get a better understanding of the expectations of today’s workers, Polycom commissioned research on global trends and attitudes towards anywhere working. This paper summarises the key findings.

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2. Work Anywhere Global Survey, Morar Consulting. 2017
ANYWHERE WORKING ON THE RISE

Currently, nearly two thirds of the global workforce take advantage of anywhere working. Compared to May 2012, when only 14% benefitted from remote working, this is a huge and relatively fast shift in working culture. Our research of over 24,000 respondents across 12 countries suggests this trend is evident across the globe. The research also provides insights into attitudes about anywhere working across different cultures and age groups.

CULTURE IS KEY

Not all cultures approach work in the same way, so variations in preferences from country to country are inevitable. The research revealed that Brazilians are ahead of the curve, with 80% of employees adopting anywhere working - more than any other country surveyed.

At the other end of the spectrum is Japan, where only 35% of companies offer any form of flexible or anywhere working policy. This contrast in culture is not completely unexpected. Historically, the Japanese work culture has rewarded long hours and ‘presenteeism’ (being physically present in the office), and in 2014 the Japanese government even put measures in place to prevent ‘karoshi’ – death by overwork.

Fortunately, this shows that the attitude to work is changing, but the survey results show that compared to the rest of the world the shift is much slower for Japan.

The survey also explored what different cultures perceive as the top benefits of working anywhere. The most popular reported benefit of anywhere working is its contribution to a better work-life balance. Countries including China (72%), Canada (70%) and Australia (68%) all agreed that this is the main advantage. Another key benefit is productivity, which topped the list of benefits among respondents from Brazil (75%).

Some common concerns about anywhere working were also revealed in the survey responses. More than half (62%) of all respondents (and more than two thirds of Russian and Indian respondents) said their biggest concern is being perceived as less hardworking if they adopt the practice.

There are, however, other factors that impact attitudes around anywhere working besides culture. Different age groups also highlighted different attitudes to anywhere working.

WHAT DO YOU THINK IS THE BIGGEST ADVANTAGE OF FLEXIBLE WORKING?

- 16–29: 68%
- 30–44: 70%
- 45–59: 22%
- >59: 36%

- You can work anywhere and be more productive: 61%
- You avoid the stress of commute into the office: 59%
- You have more time to exercise/enjoy hobbies: 38%
- You have the choice to take control of your work-life balance: 74%
- You save money on travel: 25%
- 39%

AGE DOES MATTER

The research highlights the difference between the approach to anywhere working of respondents of 45-60 years old and millennials (around 18-30 years old) in particular.

Just over half (51%) of 45-60 year olds said they regularly take advantage of anywhere working, compared to 70% of millennials. This may be a result of these two categories gravitating towards different working cultures that offer different opportunities for anywhere working, as just 15% of millennials said their employers do not offer anywhere working, compared to 36% of their parents’ generation.

Alongside this, it may not be coincidence that the most popular industry for millennials to work in is technology, while for 45-60 year olds, the top named industry is manufacturing, which is more likely to require workers remain on site due to the nature of the job compared to technology firms, which adopt more modern communication technologies.

When it comes to reasons for working anywhere, while both age groups agreed that getting the right work-life balance is the key advantage of anywhere working, the 45-60-year-old category is more bothered by the stress of travelling to work than millennials. Around 35% of the more experienced workers said that avoiding the commute is an advantage of anywhere working compared to just 22% of millennials. Wellness is also a consideration for many respondents, as 39% of millennials see having more time to exercise as an advantage of being able to work anywhere, compared to 30% of 45-60 year olds, who do not prioritise this as highly.
APPREHENSIONS OF ANYWHERE WORKING

Naturally, the survey also revealed some concerns around anywhere working. The main worry (62%) is the perception that colleagues will believe an individual is not working as hard if they are not in the office.

However, when we look at different age groups and levels of seniority, other concerns emerge. Over half (59%) of 45-60 year olds worry that anywhere working will cause them to work longer hours. The fear of over-working or an ‘always-on’ culture can be a big deterrent for this age group, and is one that needs to be addressed by business leaders if anywhere working is to become an accepted culture in businesses.

Those in managerial and C-Suite positions also tend to worry about being perceived as less hard working but one of the key findings in the research when looking at seniority is concern around distractions. 40% of those in more senior positions said that one of their biggest concerns was that they will be distracted, with CXOs being most concerned (36%).

CONQUERING CONCERNS

A common theme underlying concerns around anywhere working is a lack of trust. Employers need to trust employees, and employees need to trust each other. And all workers need to trust themselves. A first step in enabling this trust is ensuring workers are measured by output, not by hours worked or presenteeism.

Respondents were asked how their companies could improve trust amongst workers and improve perceptions of anywhere working to overcome the concerns highlighted in the research. The most popular recommendations were to:

- Equip workers with technology that is easy to use and which connects them to their colleagues (62%).
- Ensure the same policies are applied to everyone in the business, regardless of seniority or situation (60%).
- Provide guidelines on how to manage anywhere working (53%).

Globally, 91% agreed that technology is a key factor in improving relationships and fostering better teamwork.

These responses suggest that workers and leaders see the value of investing in technology to get more out of individuals and teams.
Communication is widely enhanced by the use of video. Voice-only calls, email or instant messages (IM) lack the face-to-face engagement that is essential to building rapport, team spirit and productivity. Video can help bridge that gap while also enriching other types of interaction. For example, the survey found that people who use video collaboration tools often are more likely to pick up the phone and chat to someone to solve a quick question (46%), rather than IM (37%). Furthermore, 49% of workers worldwide said they considered their tone in emails more carefully if they spoke to the recipient on video as well.

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One of the advantages of anywhere working is its ability to adapt to the individual and their needs. This flexibility contributes to its effectiveness and appeal, but there must be some core technological elements in place to make today’s vision a long-term reality.

Deploying a solid unified communications (UC) network, which includes conferencing solutions, allows organisations to empower their employees to truly work anywhere. Video is clearly a front-runner in helping workers with both productivity and relationship benefits. And of course, with digital transformation speeding up globalisation of the app economy, applications are now essential to enable team members, so they can access anyone anywhere from any device, such as an app to enable quick access to a video conference or smart-pairing. Innovations such as smart-pairing allow people to continue conference calls when they walk into a room, are also important to enable workers to experience the difference with anywhere working.

Collaboration technology should make wherever you work feel like an extension of the office. If there is high-definition video conferencing available in the office building, or an immersive studio, the application on the user’s smartphone or tablet should also feature HD. If content sharing can be done live through the office systems, so should their laptop be able to share instantly and seamlessly.

Polycom is a leader in providing organisations with collaboration solutions that enable the workforce to work anywhere, anytime, as easily and productively as if they were still in the office building. However, the technology is only the first step in true ‘human collaboration’. To succeed in actually adopting a work anywhere culture globally, we need to ensure workers understand how to use these tools, not only to improve their productivity and output, but also to enhance their job satisfaction and work-life balance.
Methodology

The survey commissioned by Polycom Inc. was conducted by Morar Consulting. Sample Data collected from 25,234 consumers of 12 countries, which included: United States, Canada, Brazil, Japan, Germany, United Kingdom, India, Singapore, Russia, France, Australia and China. 55% of those surveyed had job titles managers or above. 58% of surveyed are responsible for care in some capacity, and 68% surveyed are parents.

To learn more about how collaboration can empower your workforce, please visit www.polycom.com/your-workspace and find out what will best suit your needs.