



Weber Shandwick: Microsoft

Workplace of the Future

Commentary Presentation



October 2012



Flexible working: Who? Where? When?

Who works flexibly at the moment?

- Around two-thirds of office workers work flexibly at least on occasion.
- Males (72%) are more likely to be flexible workers than females (58%).
- As employees get older, it is more likely that they work flexibly.
- The larger the organisation worked for, the less likely it is that an employee works flexibly.
- One in five respondents work away from the office at least twice a week.
- Flexible working is most likely to occur in Denmark with more than three-quarters (77%) of respondents reporting as such.
- It is least likely to occur in Belgium and France, with only 54% doing so.

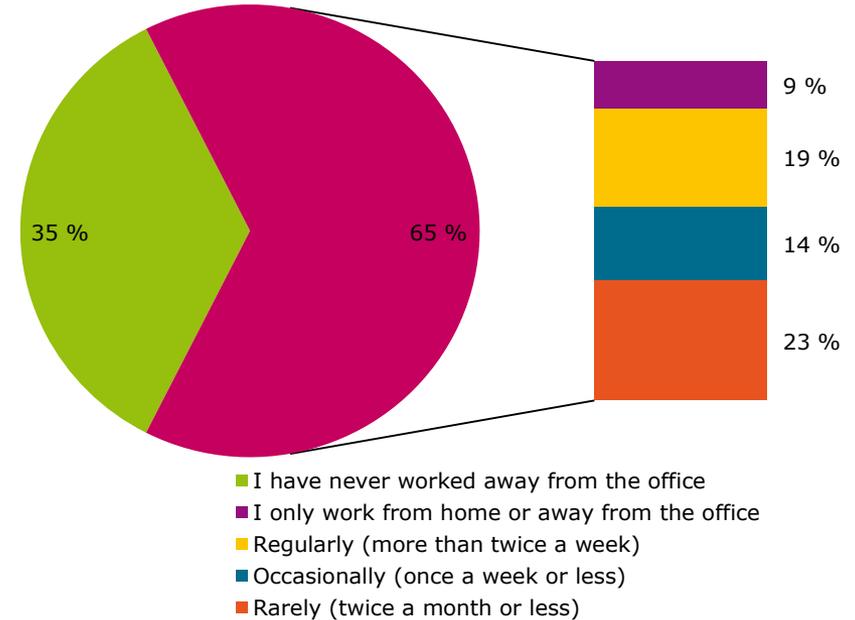


Figure 1: How often do you work flexibly (this could mean working from home or away from the office for a few hours or days during the week)?

Which organisations currently allow flexible working?

- Although two-thirds (65%) of office workers report that flexible working is allowed at their workplace, only one third have a flexible work policy and technology support in place to enable flexible working.
- Organisations with less than 10 employees are the most likely to allow flexible working, with three-quarters (74%) doing so; four in ten have a policy and technology support in place.
- As organisations increase in size, it is less likely that flexible working is allowed.
- Almost half (49%) of employees in Norway report their organisation having a policy and technology support in place, compared to just one in five (19%) in France.

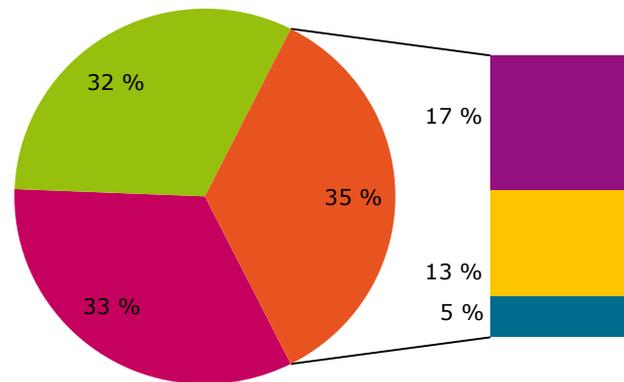


Figure 2: Does your business allow you to work flexibly?



■ Yes, we already have a flexible work policy and technology support in place which benefits everyone

■ Yes, there is not a flexible working policy in place but it is allowed on a case by case basis

■ No, everybody keeps strictly to their regular work hours in the office

■ No, flexible working is discouraged and only occurs under exceptional circumstances

■ Don't know



Where do office employees work?

- Around one in six (16%) employees who could work in an office, have not done so in their current role.
- Two-thirds of employees have worked at home at some point.
- More than a quarter (26%) of employees have visited other organisation's offices/branches.
- More than one in five have worked during their commute.
- The smaller the organisation, the more likely it is that employees have worked at home or at cafés.
- Almost three in ten (29%) of employees in organisations of more than 500 employees have visited other organisations' offices/branches.

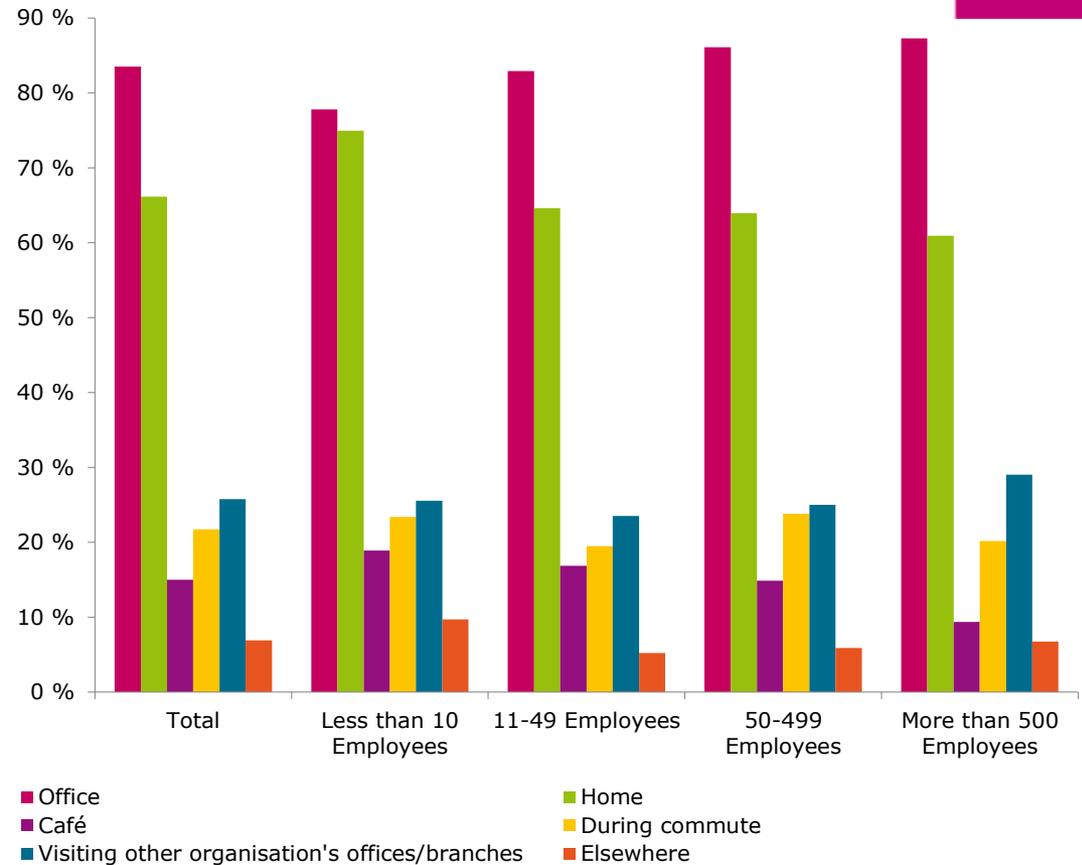


Figure 3: In your current role, have you ever worked (this could include checking emails or reading documents for example) in any of the following locations?

When do office employees work?

- More than eight in ten (82%) respondents work overtime.
- One in five respondents work at least six hours of overtime a week.
- Male respondents (85%) are more likely to work overtime than female respondents (22%).
- Respondents who work in organisations with less than 10 employees are the least likely to work overtime, although the proportion to do so is still more than three-quarters.
- Less than one in ten (9%) respondents work over time in Switzerland compared to three in ten (29%) doing so in Italy.

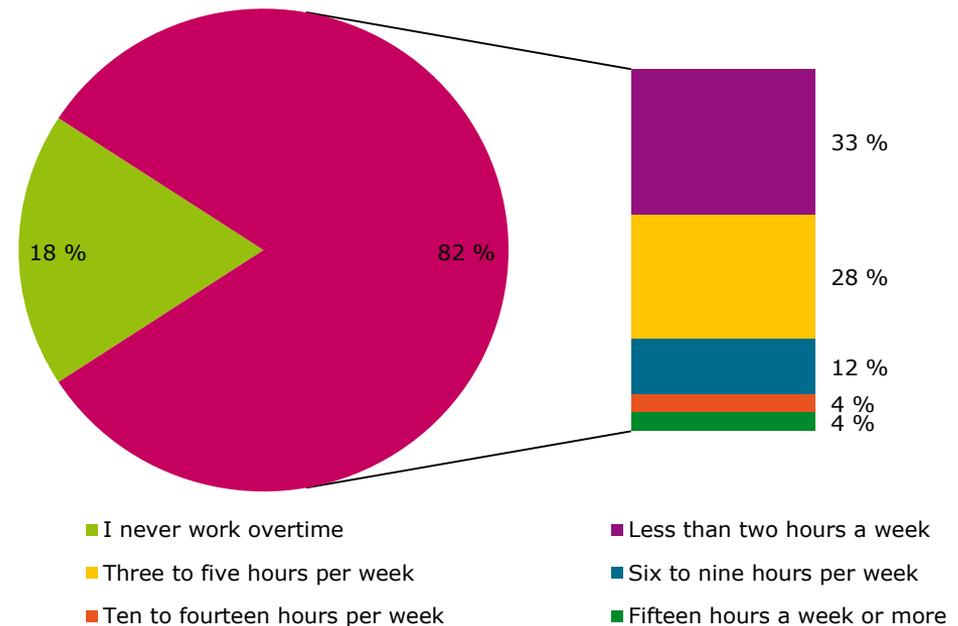


Figure 4: How often do you work overtime or outside of your normal working hours?

Where do office employees work overtime?

- Only two-thirds of respondents who work overtime, do so at their office.
- More than a quarter of respondents who work overtime, do so at home.
- Employees in organisations of less than 10 employees are the least likely to work overtime at their office.
- Only around six in ten employees aged 40 or more, normally work overtime at their office.
- Respondents in France and Germany are the most likely to work overtime at their office with more than eight in ten (81%) doing so.
- In contrast less than half (45%) do so in South Africa, with the majority (50%) working their overtime at home.

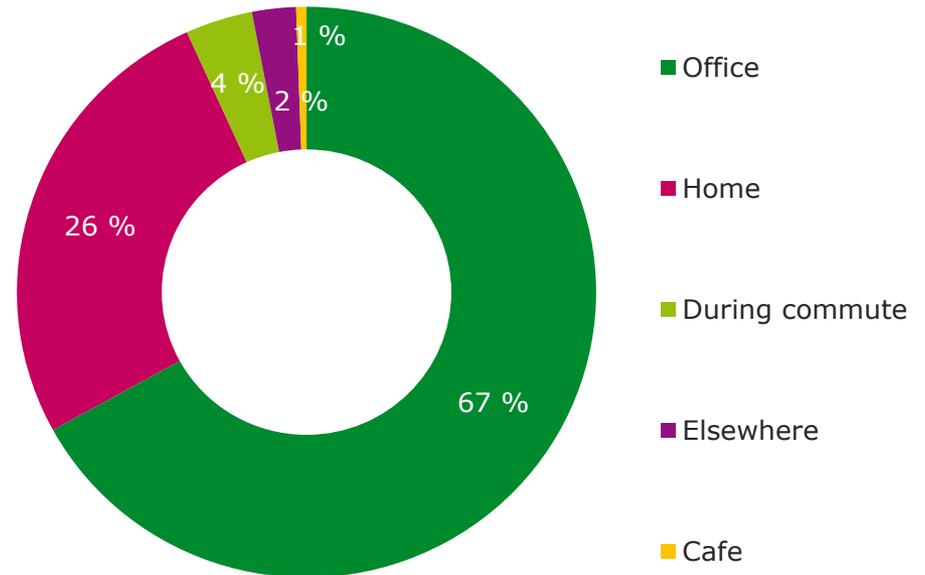


Figure 5: Do you normally work overtime from the office or elsewhere?



The Need for Flexible Working: Why is flexible working important?

Importance to employees

- More than half (53%) of office employees reported having caring responsibilities which impact on their working hours.
- If employers are to keep these employees satisfied, then flexible working – be it their time or place of work – should be an option.
- Respondents aged between 30 and 39 are the most likely to report this duty to others than their employer.
- Across all sizes of organisation, more than half of the respondents reported having these responsibilities demonstrating that there is a need for flexible working across all organisations.
- Respondents in Switzerland (43%) are the least likely to report having such responsibilities which impact on their working hours, whereas in South Africa, more than two-thirds (68%) do so.

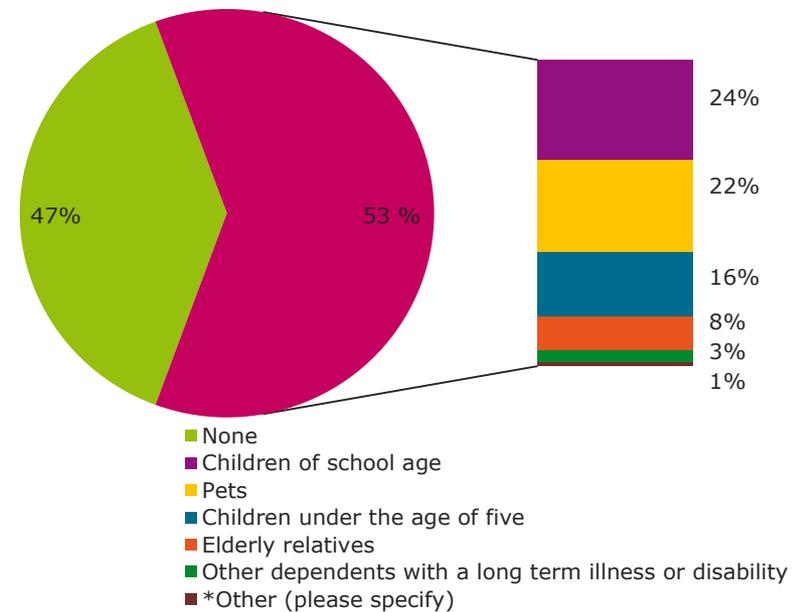


Figure 6: Do you have caring responsibilities for any of the following which impact on your working hours?

Importance to employees

- More than six in ten office workers are under pressure at least on occasion to not work late, and yet more than eight in ten do work some overtime.
- Therefore, if respondents are to keep both their employers and partners, friends or relatives satisfied – and enjoy a balance of the personal and professional – being able to work overtime from home would appear to be an option which needs to be provided.
- In the Netherlands, more than half (51%) of respondents report never facing this pressure.
- In contrast, in UAE more than eight in ten (82%) find themselves under this pressure.

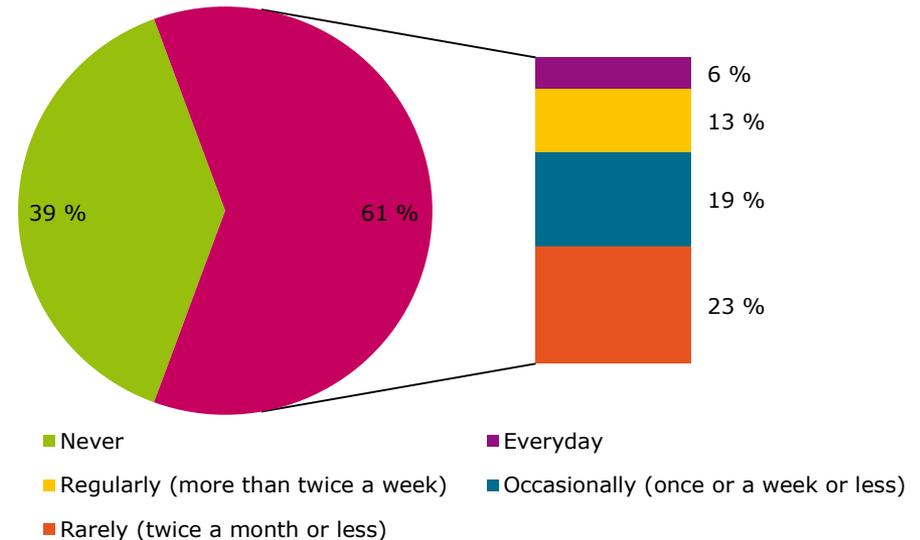


Figure 7: How often are you under pressure from a partner, friend or relative to leave the office on time and not work late?

Importance to employees

- Three-quarters of employees think their lives would be better if they could work more flexibly, with more than a third (36%) saying their lives would be much better.
- Respondents aged 18-29 are the most likely to think flexible working would improve their lives, with almost eight in ten (78%) reporting as such.
- Almost two-thirds of respondents would choose a mixture of working in the office and also away from it.
- Less than one in five would choose to work only in their office.
- Therefore, more than eight in ten would like to be able to work at home or away from their office.
- Respondents in organisations of less than 10 employees are the least likely to choose to work in their office.

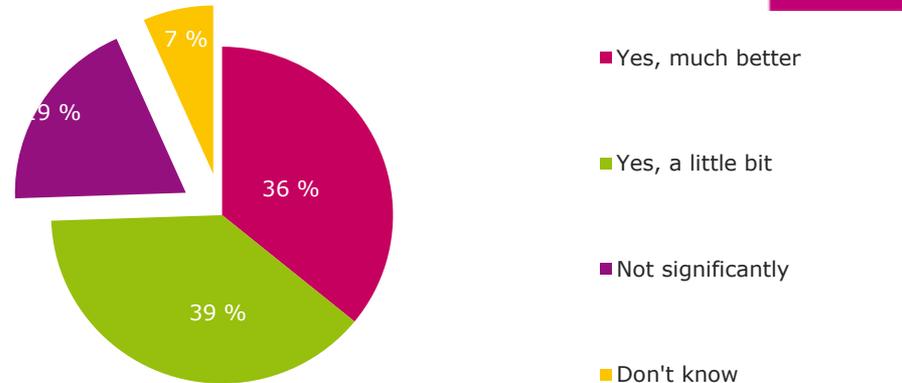


Figure 8: Do you think your life would be better if you could work more flexibly?

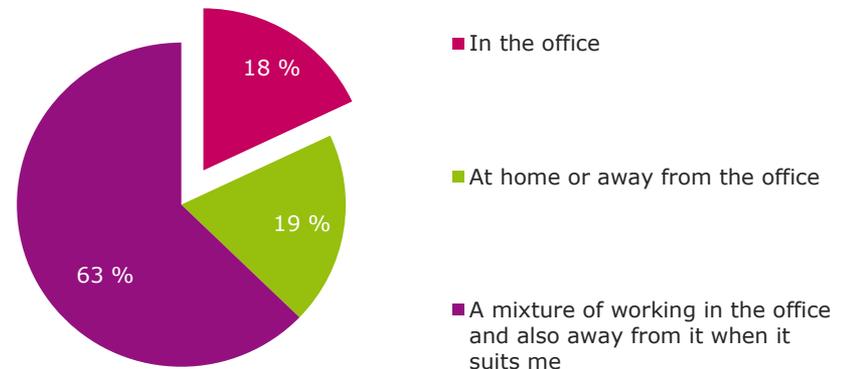


Figure 9: In an ideal world, how would you choose to work on a daily basis?

How important is it to employees?

- Less than one in five respondents reported flexible working being critical if considering a new job.
- However as almost a quarter of respondents described it as very important, four in ten would be influenced in their decision by the offer of flexible working.
- Flexible working is most important to employees of organisations with less than 10 employees; 28% said it was critical and 22% said it was very important, meaning 50% would be influenced by it.
- Only 6% of respondents in Netherlands described flexible working as critical, whereas almost 5 times as many did so in Switzerland (29%).
- Overall, Austria (55%) is the country where it is most likely respondents would be influenced by flexible working.

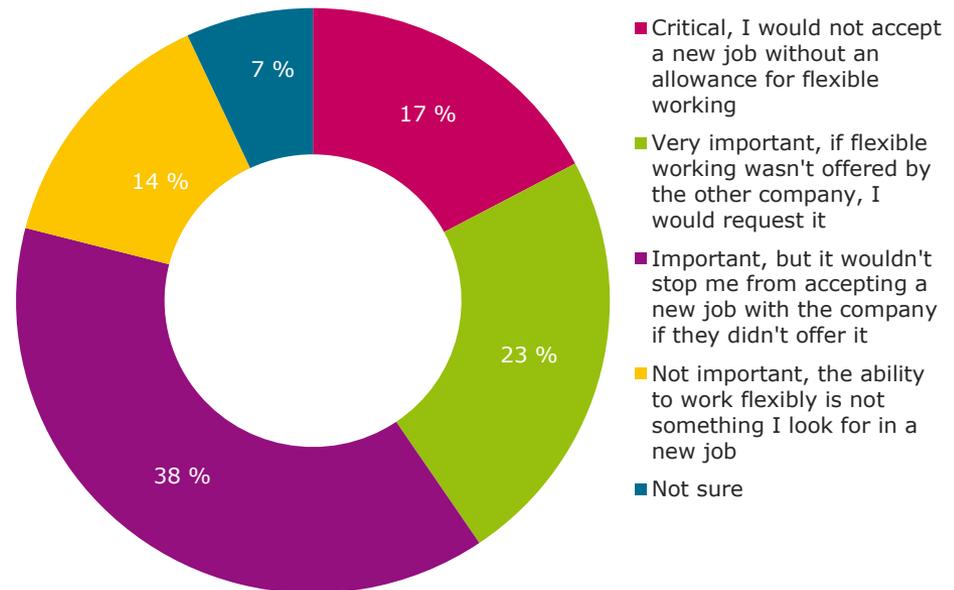


Figure 10: If you decided to look for a new job with another company, how important would the offer of flexible working be to you?

Importance to employers

- As well as allowing employees to be flexible in their time of work to keep them satisfied, organisations can also gain improved performance from their employees by doing so.
- Around one in eight (13%) employees feel they are most productive after 18:00 or before 08:00.
- Providing these respondents with the ability to work between these hours would improve their performance.
- Employees of organisations with less than 10 employees are the most likely to report being most productive outside of 08:00 – 18:00.
- Males are more likely than females to report being most productive between 18:00 and 08:00.
- More than a quarter (26%) of employees in Austria are most productive between 18:00 and 08:00, compared to just 6% in Finland.

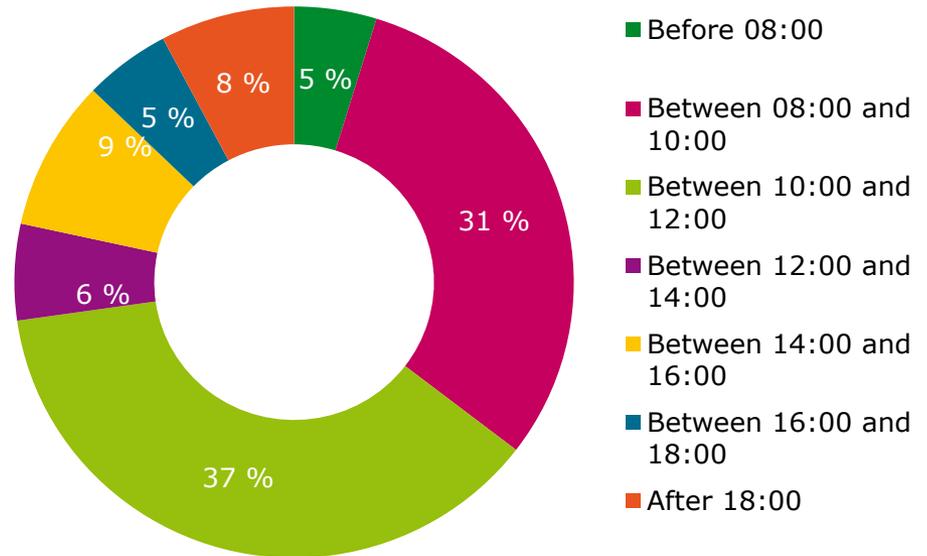


Figure 11: During which period of the day are you most productive?

Importance to employers

- Similarly, employers can gain improved performance from their employees by allowing them to be flexible in their location of work.
- Less than two-thirds of employees report that they are most productive at their office.
- Instead, three in ten are most productive when at home.
- Providing these respondents with the ability to work at home would improve their performance.
- Respondents in UAE are the most likely to report being most productive in their office, with more than eight in ten (81%) doing so.
- In contrast, almost half (46%) of Portuguese employees are most productive when working at home.

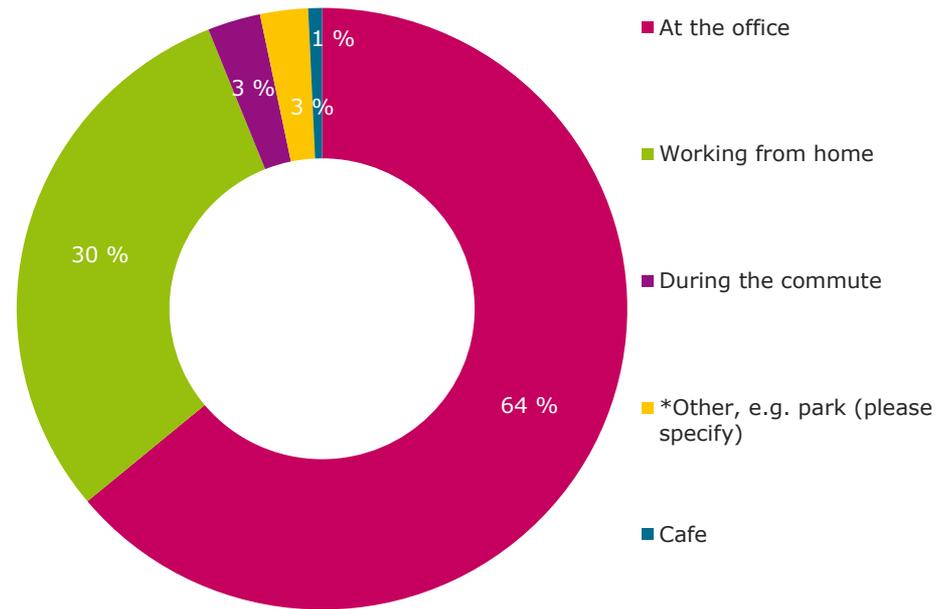


Figure 12: *Where are you most productive?*

Importance to employers

- More than half (57%) of employees who work flexibly believe they are more productive when doing so, with a third reporting that they are much more productive.
- Only one in ten (11%) believe they are less productive.
- Therefore, whether it being flexible in regard to place or time of work, there are strong indications that employers can improve the productivity of their employees by allowing them to work flexibly.
- Spanish respondents are the most likely to report that they are more productive away from their office, with more than three-quarters (76%) doing so.
- In Switzerland however, less than half (45%) expressed this belief.

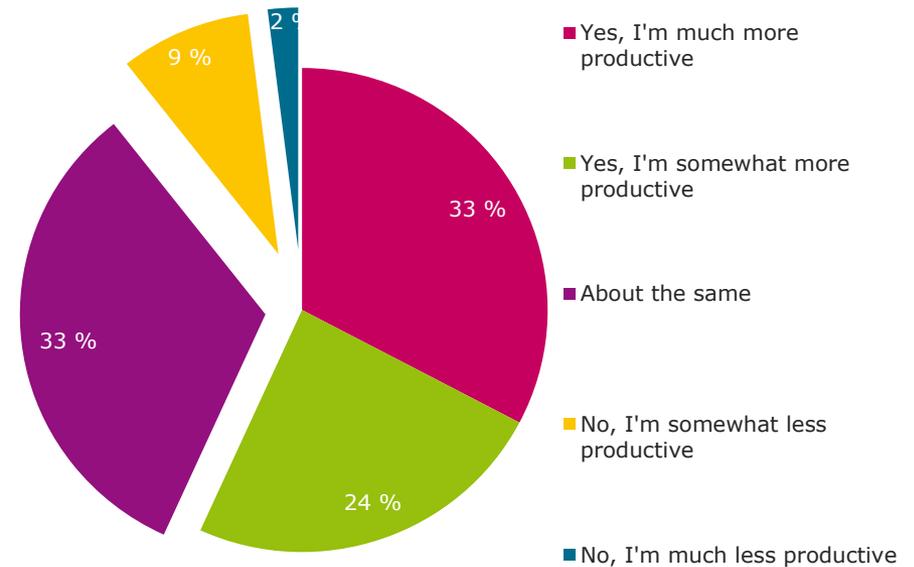


Figure 13: Are you more productive when you are able to work flexibly or away from the office?



The Challenges of Flexible Working: Who wants flexible working?

Can flexible workers be trusted to be productive?

- Only just over half (51%) of office workers always trust their colleagues to be productive when working flexibly or away from the office.
- 18-24 year olds are the least likely to say they always trust their colleagues.
- Whereas, respondents aged 50+ are the most trusting.
- Employees in the smallest organisations surveyed are the most trusting of their colleagues.
- The most trusting nation is Denmark and the least trusting is Germany.



Figure 14: Do you trust your colleagues to be productive when they work flexibly or away from the office? Cross-tabbed by respondent age.

What are main drawbacks to flexible working?

- Not being able to access office technology or systems, and finding it hard to 'switch off' are equally reported to be the main drawback to working flexibly.
- However, as organisations increase in size, access to technology is considered to be the greater drawback.
- More than a quarter of employees in organisations of more than 500 employees don't have access to the technology or systems which they do in their office.
- A third (32%) of respondents in UAE reported insufficient access to technology being the main drawback, compared to just 9% doing so in Spain.

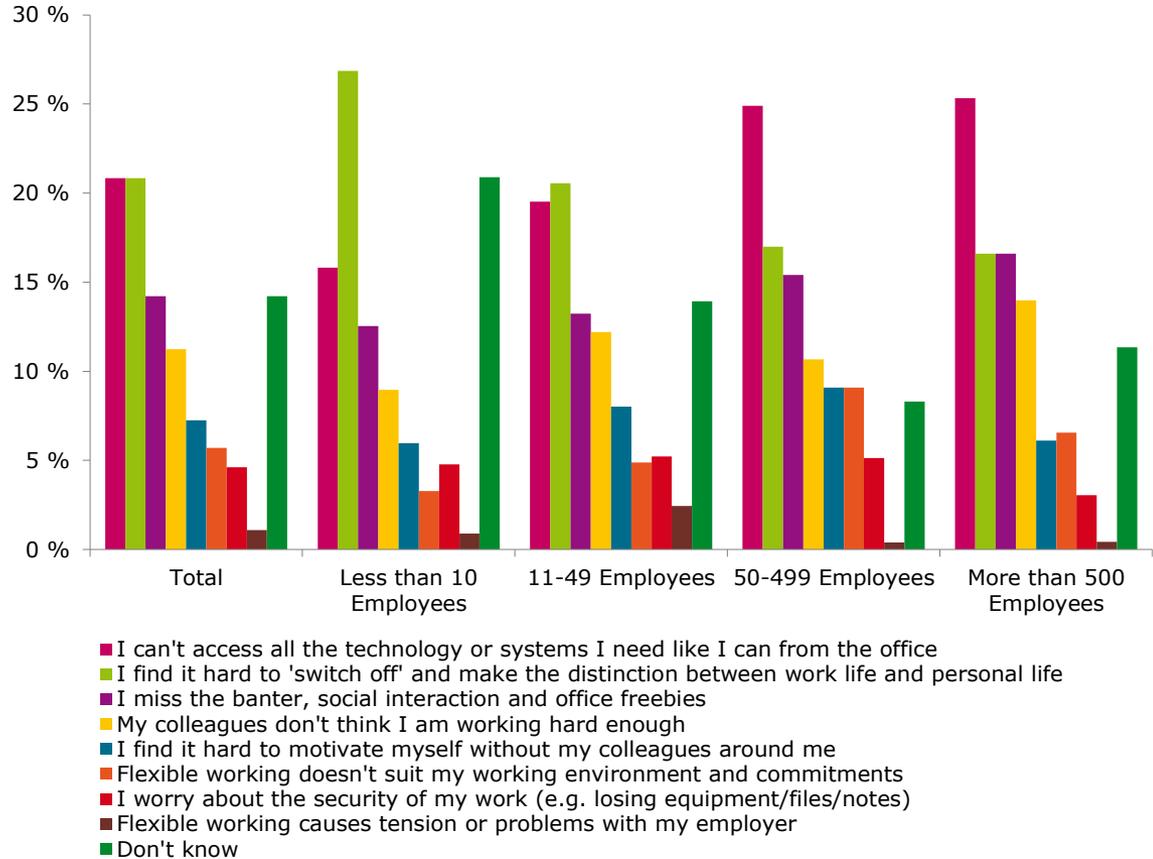


Figure 15: What is the main drawback to working flexibly or away from the office? Cross-tabbed by organisation size.



Technology in the workplace



Employees' use of personal technology

- Overall, more than four (44%) in ten office workers use either a personally-owned laptop or mobile device for email access.
- Almost four in ten (37%) employees use a personal laptop at work and almost one in five (19%) use a mobile device for email access.
- In organisations of less than 10 employees, more than half (55%) use at least one personally-owned device for work purposes.
- As organisations increase in size, less employees use personally-owned technology, with only a third of employees in the largest organisations doing so.
- One reason for this is that as organisations increase in size, more employees report not being allowed to for security reasons.
- Personally-owned technology is used most in South Africa (63%) and least in Sweden (31%).

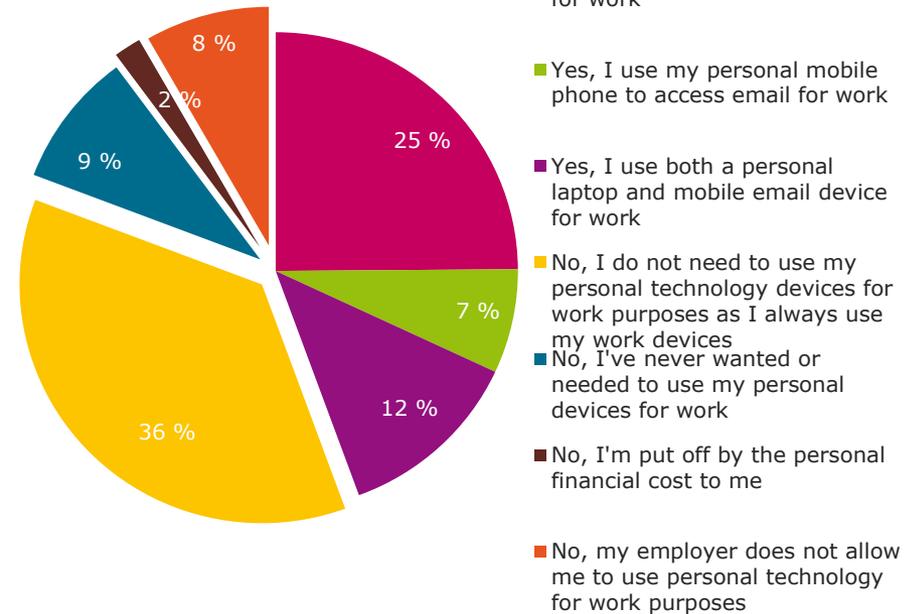


Figure 16: Are you using your personal technology devices for work purposes?

What technology can help flexible working?

- Therefore, it is not surprising that more than half (52%) of respondents think a company laptop or mobile email device would help them when working flexibly.
- As organisations increase in size, more respondents want improved software which mirrors their work PC and systems.
- The older employees are, the less likely it is that they think office networking tools would be of benefit.
- Respondents in Portugal and UAE would benefit most from company devices (65%).
- The need for improved software is greatest in Ireland and South Africa (46%).

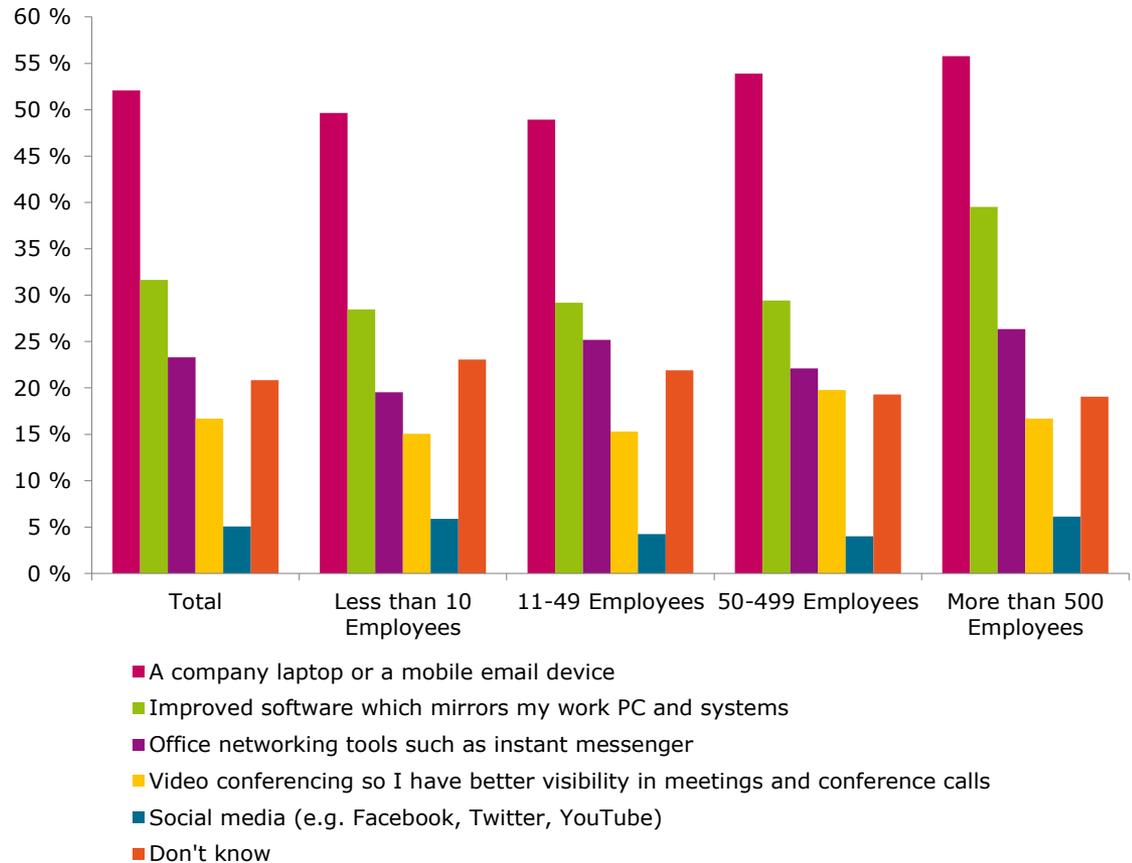


Figure 17: What technology do you think would help you work more flexibly and be more productive when/if working away from the office? Cross-tabbed by organisation size.

What role do IT departments play in enabling flexible working?

- Less than one in five (19%) respondents describe their IT departments as being very helpful in enabling flexible working.
- The larger the organisation, the more likely it is that an IT department is described as very helpful.
- Male respondents (21%) are more likely to describe IT departments in this way than females (15%).
- Four in ten respondents describe them as quite helpful, but held back by protocol and security (24%) and cost implications (16%).
- As organisations increase in size, it is also more likely that they are held back by protocol and security.

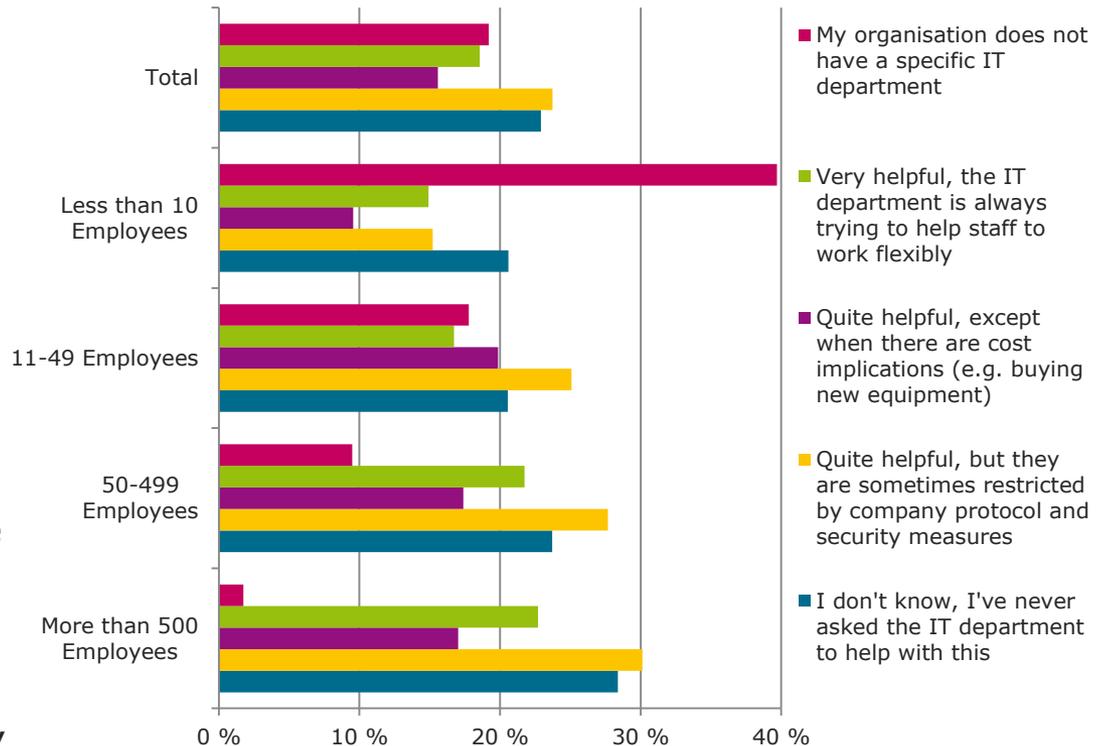


Figure 18: How helpful is your IT department when it comes to enabling you to work flexibly? Cross-tabbed by organisation size.

What role do IT departments play in enabling flexible working?

- Only three in ten respondents report that their business/IT department provides corporate guidelines to follow regarding flexible working.
- However, this increases in likelihood amongst larger organisations.
- As respondents get older, they are less likely to report being provided corporate guidelines to follow.
- Whilst smaller organisations appear to be more encouraging of flexible working, they are less structured in their provision.
- In contrast, whilst larger organisations are more secure in their flexible working set-up, they are not providing this opportunity to as many respondents as would like it.

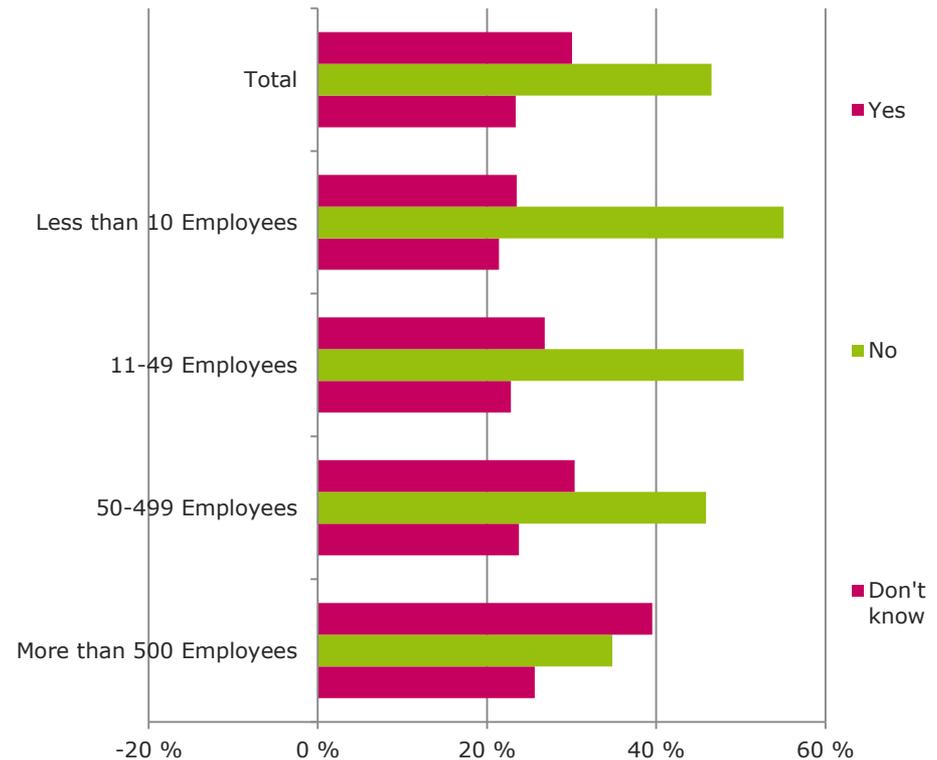


Figure 19: Does your business/IT department provide corporate guidelines to follow regarding working flexibly? Cross-tabbed by organisation size.



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