

Mobile Workforce Survey 2012

Executive Summary Report



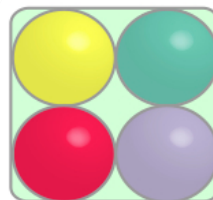
Presented by:

Novacrea Research Consulting



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and



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Mobile Work is the New Normal

The future of work is already here. Over the last several decades knowledge work has burst out of the traditional office. Yes, offices still play a very important role in supporting work and workers, but increasingly powerful technologies are making anywhere/anytime work a reality in today's global economy.

The work that matters in 2012 is knowledge based, globally distributed, and almost completely location independent. Everyone talks about the anywhere office, and most knowledge workers regularly check their email, call their colleagues, and do research and writing from many different locations over the course of a day or a week.

What does this new comfort level with mobility mean for individuals, for their managers, and for the technology support functions that make it all possible?

Past research on mobile workforce has focused on either the technology needs of mobile workers or the challenges of managing a virtual workforce. No studies that we know of have taken an integrated look at both the hardware needs of mobile workers (e.g., mobile devices) and the factors that impact their engagement and personal views about mobile or remote work.

Our study was designed to focus in detail on just how and where people are getting their work done today, what tools do they use to be productive, and how their mobility is affecting their work, along with their personal and professional relationships.

Before we discuss the survey results, we want to provide some context and define three types of mobile workers: those who are *internally mobile*, those who are *externally mobile*, and *remote workers*. (See Appendix on Page 10 for a list of these definitions.)

Our focus in this study is on these three kinds of mobility, not on distributed teams in which the members are all office-based but are based in different locations. We want to know how being away and on the move affect the mobile workers themselves, their technology support needs, and their working relationships.

This report summarizes our findings from the survey. It also includes our recommendations to organizations, managers of distributed teams, and support groups like HR and IT.

Key Survey Findings

Work Patterns and Communication Methods

Mobile work is the new normal.

Almost 60% of the respondents have an assigned hard-wall office or cubicle, but 32% of them are mobile within their company's facility. These workers are *internally mobile*. Another 35% of the respondents either work at a client's office or work outside of their office most of the time. These workers are *externally mobile*.

Senior managers are more likely to be internally mobile than first-line managers or individual contributors. This result is not surprising, as we would expect senior leaders to spend more time meeting with others within the company facility or traveling between facilities to meet with employees or clients.

Work is collaborative.

More than half of our respondents' time is spent on collaborative work. Our survey results show that 23% of respondents' work time is spent in face-to-face meetings with colleagues, clients, or service providers. Telephone calls, whether with other individuals or as part of a conference call, consume another 25% of work time. The other 7% of the time is spent in various kinds of online collaboration—typically using Skype® or other screen-sharing technologies.

It is not clear, however, how they divide individual and collaborative work time between their own workstations and other locations. On average, respondents spend 35% of their work time at their own office or workstation, 32% of their time in their home office, 20% in drop-in workstations or cubicles or other facility at their company (e.g., conference room, training room, cafeteria, employee lounge), and 15% in coworking spaces or third places such as cafes, libraries, airports, or hotels.

Email is the most commonly used communication method, followed by smart phone.

To no one's surprise, email is by far the most common technology that people use to communicate with coworkers. Ninety-two percent of the respondents reported using email several times a day, although email is not always the most effective mode of communication. The second-most popular communication technology is smart phone; 59% of respondents use it several times a day.

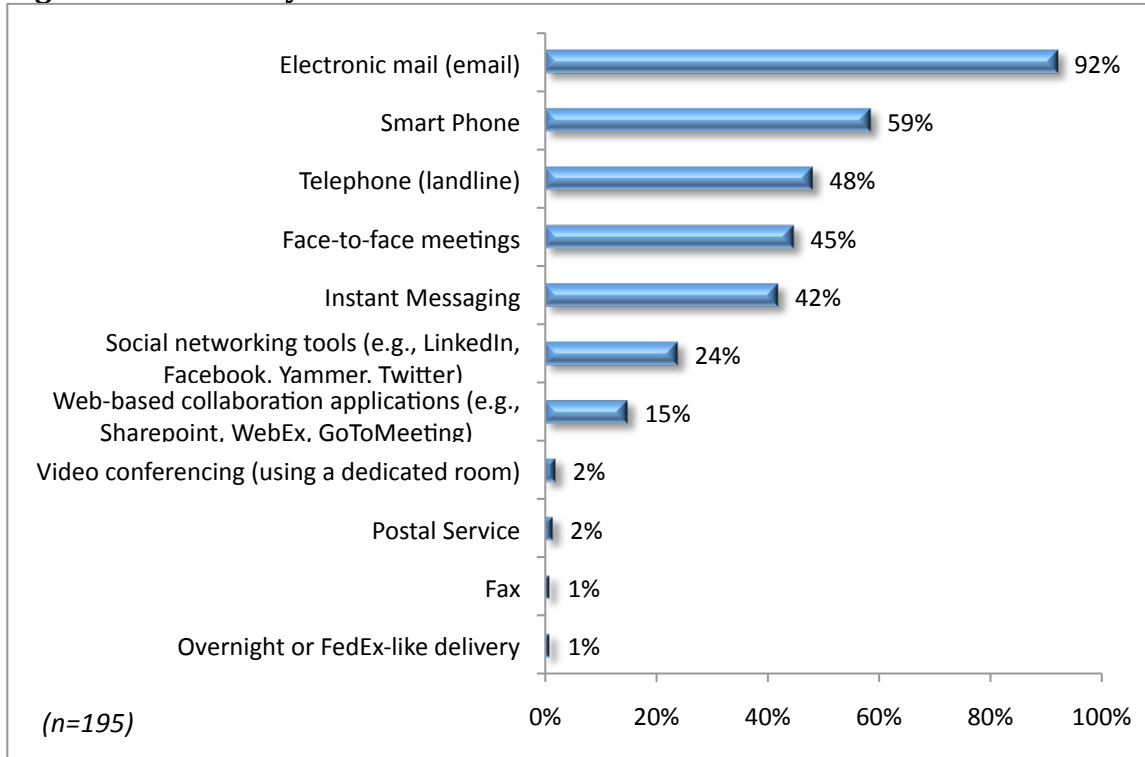
Social networking tools and online collaboration applications are seldom used.

Less than a quarter of respondents use either social networking tools (24%) or web-based collaboration applications (15%) frequently. This is a missed opportunity, as social networking tools or web-based collaboration applications can be a more effective means of communication compared to email.

Fax, large-scale video conferencing, and overnight delivery services are rarely used.

We also discovered that fax machines appear to be dying a slow death. Large-scale video conferencing (in contrast to desktop video) is hardly used at all. Overnight delivery services are used much less frequently than we expected. (See Figure 1.)

Figure 1: Commonly Used Communication Methods



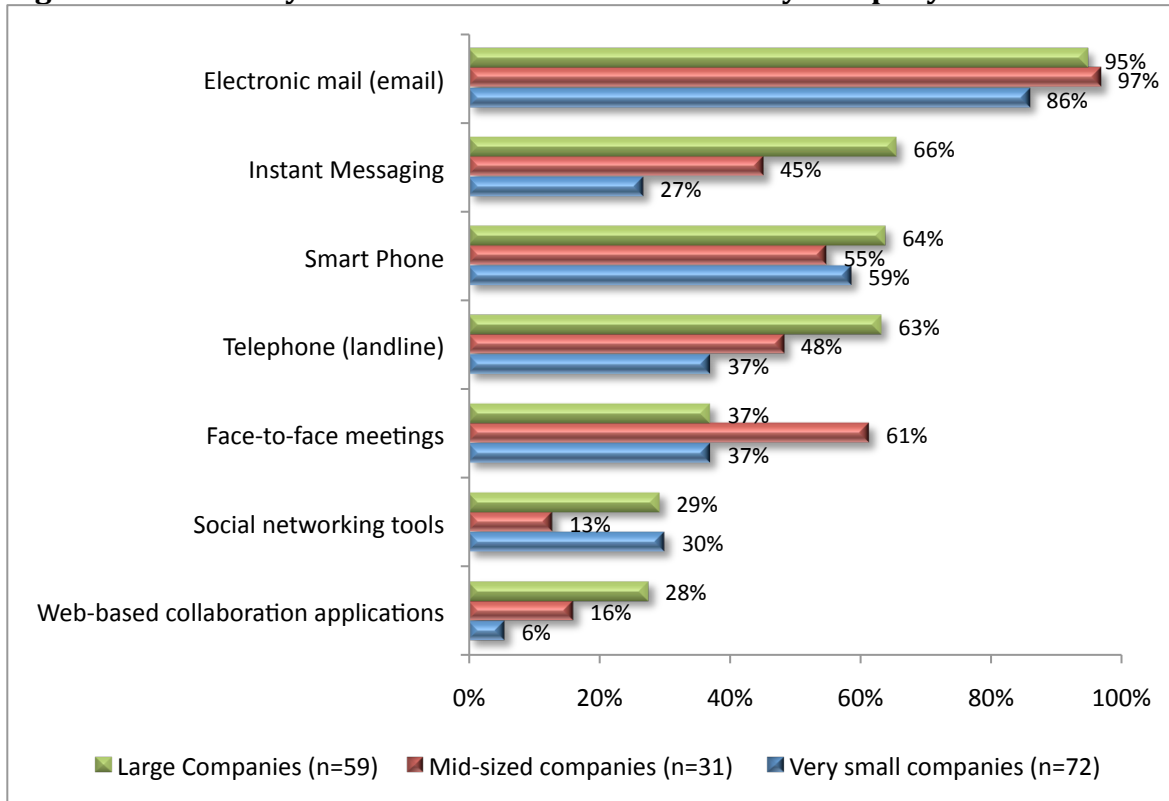
The numbers shown are percentages of respondents who indicated that they used the listed methods of communication several times a day.

Commonly used communication methods differ by company size.

Besides email, the most commonly used communication methods differ by company size. Large organizations (those with 5,000 or more employees) tend to use the more traditional means of communication—instant messaging, smart phone, and landline telephone—regularly, compared with mid-sized companies (those with between 500 and 5,000 employees) or small companies (those with 50 or fewer employees).

In mid-sized companies, employees seem to meet face-to-face regularly besides using email or their smart phones. In small organizations, smart phones are most commonly used after email. (See Figure 2.)

Figure 2: Commonly Used Communication Methods by Company Size



The numbers shown are percentages of respondents who indicated that they used the listed methods of communication several times a day.

In essence, mobile work in 2012 has become even more of a “right now” experience than we expected. Mobile workers make extensive use of technology tools like smart phones, online collaboration technologies, instant messaging, and email to reach the people they need to communicate with, in real-time or near real-time. Work has become not only global and mobile, but also essentially instantaneous.

Job Satisfaction of Mobile Workers

Job satisfaction would be higher if people could create their own work schedules.

In spite of the 24/7, always-on, nature of work in 2012, the survey respondents reported very high job satisfaction. Nearly seven out of ten (69%) are either “Extremely Satisfied” or “Very Satisfied” with their jobs.

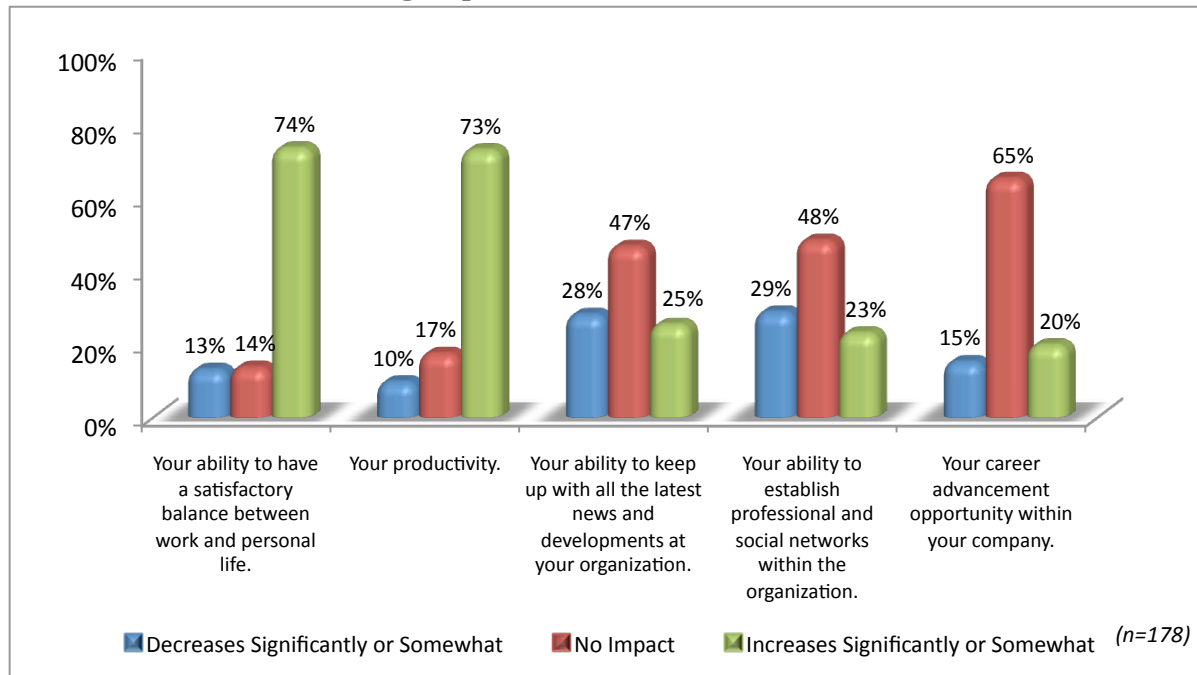
This survey, like others addressing job satisfaction, found that job satisfaction is much higher for managers and senior managers than it is for individual contributors. Less than half (48%) of the individual contributors reported positive levels of satisfaction, in contrast with 76% of senior managers and 68% of managers.

However, we were not surprised to discover that 68% of the respondents reported that their job satisfaction would “Increase Significantly” or “Increase Somewhat” if they were able to create their own work schedules and choose where they work—which is, after all, almost the definition of a mobile work environment.

Benefits of telecommuting outweigh perceived telecommuting setbacks.

One of our most important findings was that three-quarters of survey respondents reported gains in both personal productivity and enhanced work/life balance. In addition, 65% of the respondents believed their career advancement opportunities were not impacted at all when they worked at least two days a week outside of their corporate office. (See Figure 3.)

Figure 3: When you telecommute or work away from the office at least two days a week, how are the following impacted?



The numbers shown are percentages of respondents for each response category.

Managing Mobile Workers

Overcommunication is not the way to manage mobile workers. Employ proven employee engagement practices instead.

Managers may wonder how to most effectively manage their mobile workers, since by definition they are not always in the office. Many managers frequently communicate with their mobile workers as a way to stay in touch. However, overcommunication could actually interfere with workers' productivity, according to a recent study by Michael Roloff at Northwestern University and Kathryn Fonner at the University of Wisconsin-Milwaukee¹.

Our own survey results show that respondents are more likely to recommend their organization as a great place to work when their managers:

- Seek employee input before making major changes at work (73% agree with this statement, among those who would recommend their company as a great place to work vs. 26% of those who would not);
- Clearly articulate how employees' performance is measured (67% vs. 31%); and
- Give employees the autonomy to decide how to get their work done (62% vs. 20%).

These insights will help managers ensure that their employees stay engaged even when they are working on the go.

¹ Fonner, K.L. (2012, September). Overcommunication causes stress for teleworkers. *T+D Magazine*, 26.

Conclusions and Recommendations

Based on the results of this survey, there are five primary messages for employers:

1. Mobile work is not only here to stay. It is quickly becoming normal for the vast majority of knowledge workers at all organizational levels.
2. People are working this way because they can, and because it enhances both productivity and work/life balance.
3. Collaborative technologies are obviously an important platform that mobile workers depend on, but there is no immediate need to overinvest in newer, more complex tools (like video conferencing and shared white boards). Even when they are available, those tools are not central to mobile work in 2012. However, investing in enterprise social-networking and collaborative tools could improve the effectiveness of communication and help to capture organizational knowledge, rather than relying almost exclusively on email for all communication.
4. There is no evidence that mobile workers are any less engaged than their office-bound colleagues. Indeed, offering people opportunities to work outside the office regularly indicates a level of trust that is almost always returned with higher levels of loyalty and engagement.
5. It is also important to note that workers who are either internally mobile or externally mobile are more likely to recommend their company as a great place to work. This is one of the observable behaviors of engaged employees.

About Us

Pi Wen Looi, Ph.D., is the founder and principal of Novacrea Research Consulting. Novacrea helps busy HR leaders and executives increase employee engagement and improve business results. With Novacrea's end-to-end employee survey solution, you get valid employee feedback, in-depth analysis, and organized survey results. Our survey reports enable you to see subgroup performance at a glance, spot trends immediately, and quickly identify areas of strength. Let us worry about your employee survey while you focus your energy on improving your employee performance, operations, and business results. For more information, please visit www.NovacreaResearch.com.

James A. Ware, Ph.D., is the Executive Director of The Future of Work...unlimited, a research and advisory firm with a single mission: bringing the future to work. We offer guidance in creating compelling pictures of the future and designing pathways for getting there. We bring decades of experience in strategic thinking, business case analysis, and change leadership to organizations seeking to make a difference for customers, employees, shareholders, and the community at large. We track and translate the changing nature of work so senior executives can build organizations that leverage people, attract talent, and save money. For more information, please visit www.thefutureofwork.net.

The full report is available for purchase at USD \$199.00. Call 510-926-2883 or send an email to info@NovacreaResearch.com to order your copy today.

Appendix

Three Types of Mobile Workers

Internally mobile workers: These are people who spend every day inside a corporate office facility but who are essentially mobile within that space. They spend part of their workday at a workstation or desk, but they also move around freely within the facility, splitting their time among conference rooms, break rooms, lounges, hallways, and other people's cubicles or desks. Internal mobility is perhaps the most common work pattern today, but it is often overlooked in discussions about mobile work.

Locally mobile workers: These are people who regularly telecommute by working from home or a local third place one or more days a week, thereby avoiding the time and cost of a physical commute to their primary corporate office. We call these workers locally mobile.

Remote workers: These workers are located at greater distances from the central office. They may be based in a completely different city or state, or even in another country, or on a different continent. Remote workers may or may not be mobile. They could just as well be in a corporate office most of the time, but they interact with their colleagues electronically, and in some cases may have never met face-to-face with each other. Sometimes, of course, remote workers are also mobile. They can be locally based but on extended trips—being temporary road warriors who keep the airlines, hotels, and restaurants of the world in business.

Methodology and Participant Profile

The survey was open for data collection between June 24, 2012 and July 31, 2012. A total of 204 people participated in the study.

- Sixty-five percent of survey respondents are located in North America, and 20% are based in Europe. The others are located in Asia Pacific, India, and Latin America.
- Our respondents work in a wide variety of industries, including consulting (30%), manufacturing (9%), real estate and rental and leasing (9%), information technology (6%), higher education (6%), and architecture, furniture, and interior design (5%).
- In addition, 36% of our respondents are in a senior management role and 24% are individual contributors.
- The survey respondents also represent many functional areas. Nineteen percent of the respondents are involved in real estate and workplace services, while 15% are consultants, and 13% are in sales. Although we believe the areas that intrinsically involve mobility are probably over-represented relative to the general population, we are very comfortable that they do constitute a meaningful cross-section of mobile workers.