



2015

PGi GLOBAL TELEWORK SURVEY

TRENDS

AROUND THE WORLD
SHAPING THE FUTURE
OF WORK

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Trends around the world shaping the future of work.

Contents

- Introduction..... 3**
 - Survey Methodology..... 3
 - Common Terms..... 3
- Executive Summary..... 5**
- The State of Telecommuting Around the World..... 7**
 - Global Telework Numbers..... 7
 - Changing Perspectives and Attitudes..... 9
 - Telecommuting Benefits and Strengths 10
- Telecommuting Trends Shaping the Future of Work..... 14**
 - Teleworking Outside of the Home Office..... 14
 - Death of the Long Commute..... 16
 - Technology Powers Telecommuting..... 19
 - Employees Want More Remote Work..... 21
- Obstacles Remaining for Teleworkers..... 24**
 - Why Many Global Knowledge Workers Haven’t Left the Office..... 24
 - Overcoming Telework Pitfalls..... 26
 - Non-Teleworkers Want to Leave the Cubicle..... 29
- Sponsored By..... 30**

INTRODUCTION

Sean O'Brien, PGi EVP of Strategy and Communications



The mobile worker revolution has been underway for several years now. As the world's largest dedicated provider of collaboration software and services, PGi is uniquely positioned at the heart of the remote work movement, providing workers all over the globe with the tools and services they need to stay productive from wherever they are.

Work is no longer a place. Instead, our contributions span beyond the 9-5 and beyond the office walls. We join meetings from our smartphones, edit and share files from our tablets and chat with colleagues on our laptops—in airports, coffee shops, cars, taxis, planes, hotels and our own homes.

To learn more about the changing nature of telework around the globe, PGi polled nearly 3,000 **knowledge workers** in North America (NA), Europe, the Middle East and Africa (EMEA) and Asia Pacific Japan (APJ). We wanted to understand who was **telecommuting**, why they were or weren't, what technologies they used and more.

And today we're proud to share our findings with you all.

Survey Methodology

The "PGi Global Telework Survey" consists of online responses from 2,759 global PGi customers, categorized as "**knowledge workers**" based on their roles. Questions were distributed and collected February-May 2015. For complete survey methodology, including weighting variables, please email publicrelations@pgi.com.

Common Terms

- + **Flexible Working**
Working outside of a company's normal hours.
- + **Knowledge Worker**
Employees that produce ideas and information instead of goods and services.
- + **Shared Workspace**
An alternative virtual or physical office space where workers of different companies work alongside each other.
- + **Telecommuting**
A way for employees to "commute" to work virtually through the use of collaboration technology.
- + **Teleworking**
Working from a distance such as in the field, at a shared workspace or from a satellite branch.

**PGi IS UNIQUELY
POSITIONED AT THE
HEART OF THE REMOTE
WORK MOVEMENT"**

| PART ONE



EXECUTIVE SUMMARY

Survey responses revealed that the majority of global **knowledge workers** telework and that attitudes towards telework are increasingly positive within organizations.



Teleworkers

Of the nearly 3,000 workers polled, **79%** work outside the office.

Worldwide, the most prevalent telework setup is working remotely **one day per week**.

66% of teleworkers responded that attitudes toward telework were becoming more positive in their organizations.

60% of **teleworking** respondents worldwide would leave their existing job for a similar job, at the same pay rate if they could work from home full time.



Non-Teleworkers

Of the nearly 3,000 workers polled, **21%** never work outside the office.

Worldwide, the most common reason given for being unable to telework was “**Not an option in my role.**”

51% responded that attitudes toward telework were becoming more positive in their organization, and yet **54%** of their organizations have no formal telework policy.

55% of non-**teleworking** respondents answered “Yes” when asked if they wished they could telework.

PART TWO



THE STATE OF TELECOMMUTING AROUND THE WORLD.

Responses from the PGi Global Telework Survey indicate that telework is the future of work. The majority of **knowledge workers** now telework, signaling a turning point in which workers and companies around the world increasingly adapt to the new norm: the digital workplace.

Global Telework Numbers

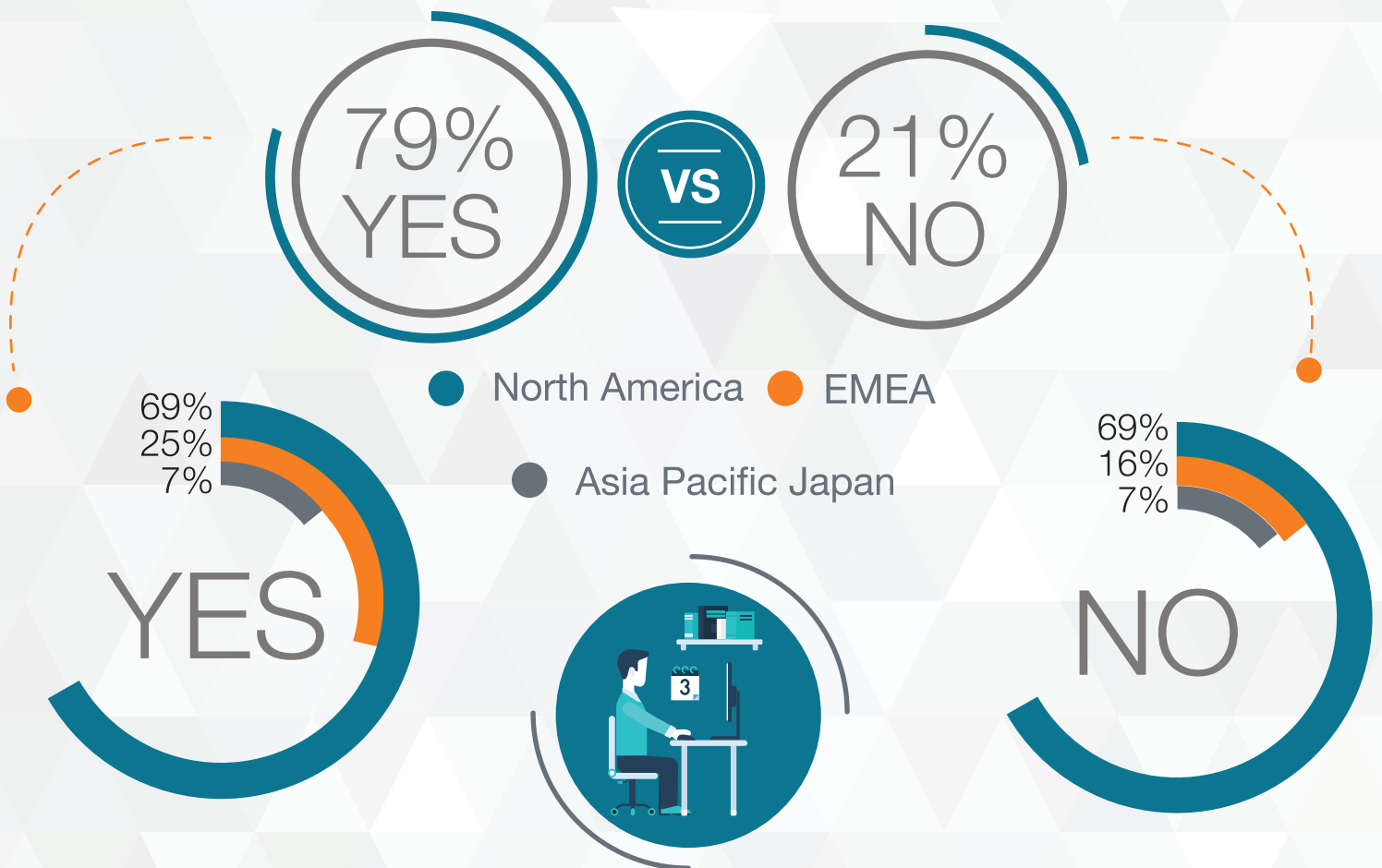
Approximately **79%** of the surveyed **knowledge workers** telework at least one day per week, with NA reporting the widest telework adoption, followed by EMEA and APJ.

The survey revealed that the most popular form of telework globally is “**flexible work**,” a hybrid of in-office and out-of-office work. The majority of **teleworking** survey respondents reported working one day or less outside of the office, followed by **teleworking** between two and three days. Among teleworkers on the other side of the spectrum, NA workers reported the highest percentage of full-time **telecommuting** positions.



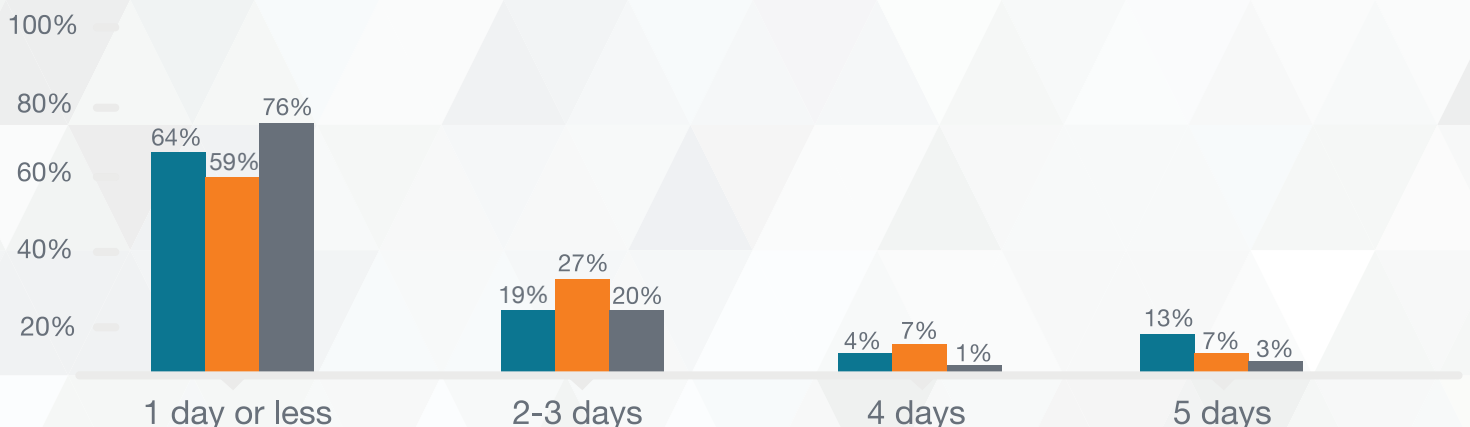
TELEWORKERS

DO YOU EVER WORK OUTSIDE YOUR COMPANY'S PHYSICAL OFFICE?



IN THE AVERAGE WORK WEEK

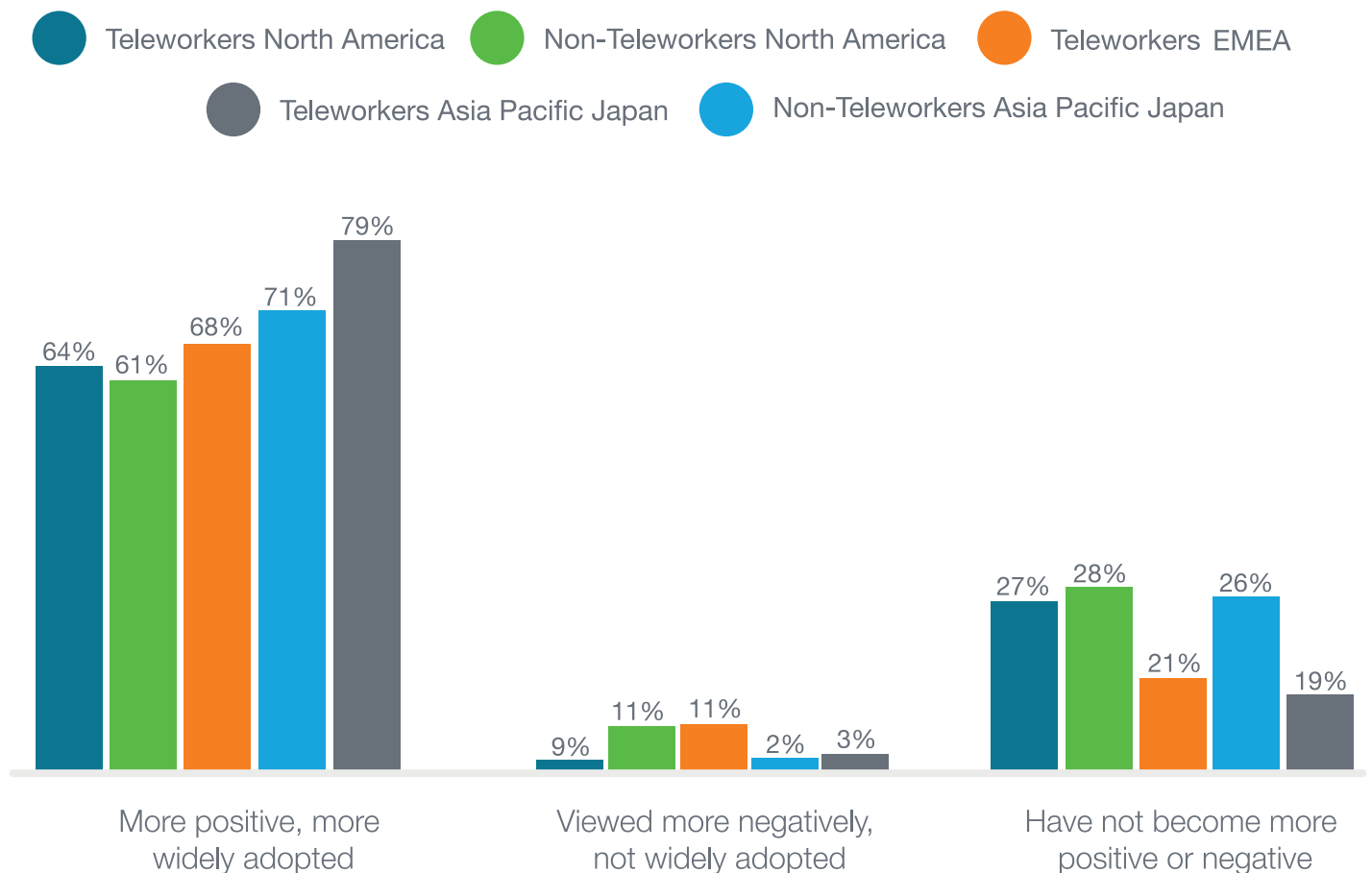
HOW OFTEN DO YOU WORK OUTSIDE THE OFFICE?



Changing Perspectives and Attitudes

More companies are embracing **flexible working** than ever before, with **66%** of surveyed teleworkers reporting that **telecommuting** is more positively viewed in their organization. Even amongst non-teleworkers, **62%** worldwide said their companies are more positive toward **telecommuting**, particularly in APJ.

How are perspectives about telecommuting changing in your company?



Telecommuting Benefits & Strengths






Reduced commute time, better work-life balance and flexible hours rank as the top three **telecommuting** benefits. Non-teleworkers answered that **telecommuting** saves you money and lowers your stress, while teleworkers put more value on better productivity. In APJ, both teleworkers and non-teleworkers rank productivity lower than the other regions, instead putting more value

on the benefits of flexible hours and better work-life balance.

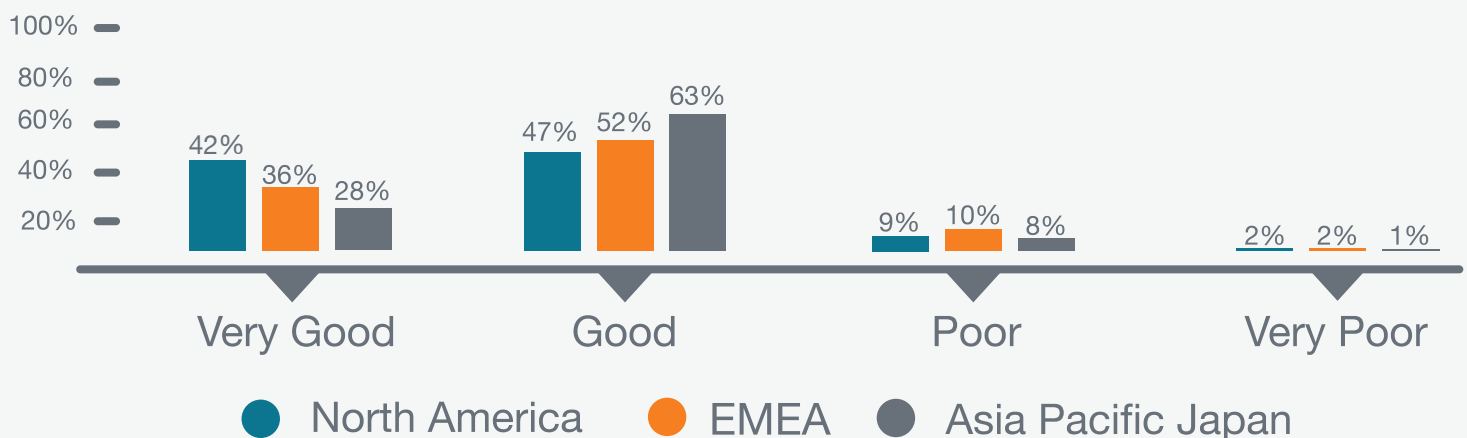
Overall, **89%** of global teleworkers rated their supervisors' remote management skills as good or very good. Remote managers received the highest ratings from NA teleworkers, while APJ (**63%**) and EMEA teleworkers (**52%**) reported room for improvement.

What do you think are the top benefits of telecommuting?

Teleworkers	North America	EMEA	Asia Pacific Japan
	Eliminates/reduces commute time	Eliminates/reduces commute time	Flexible hours
	Better work-life balance	Better work-life balance	Better work-life balance
	Productivity	Productivity	Eliminates/reduces commute time

Non-Teleworkers	North America	EMEA	Asia Pacific Japan
	Eliminates/reduces commute time	Better work-life balance	Flexible hours & better work-life balance
	Flexible hours	Eliminates/reduces commute time	Eliminates/reduces commute time & cost savings
	Cost savings	Productivity	Lower stress

How would you rate your supervisor's remote management skills?



I PART THREE



TELECOMMUTING TRENDS SHAPING THE FUTURE OF WORK.

From where and how we work to the devices we use to get that work done, everything about the traditional workplace is shifting. New technology, globalization and mobility are the stepping stones that have led toward an increase in **flexible work** adoption worldwide.

Today's workers access information, communicate and collaborate differently than any other time in our lives. Because of this, **telecommuting** has become a trend that is genuinely shaping the future of work.

Teleworking Outside of the Home Office

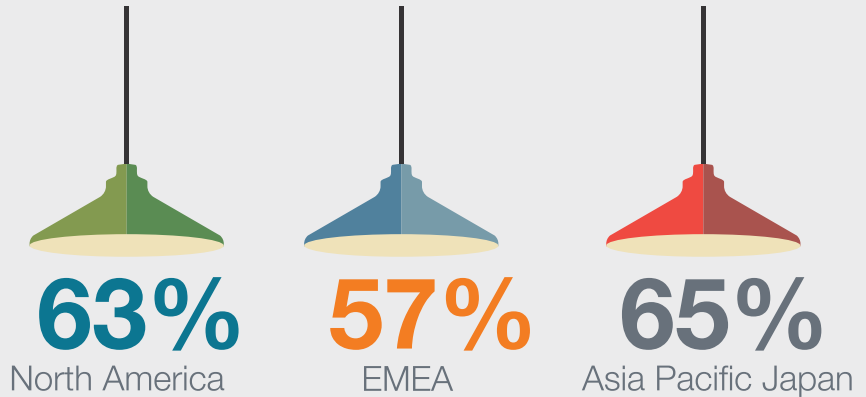
While the home office is still the top choice for teleworkers (**62%** globally), the remaining **38%** are setting up shop at **shared workspaces** (**10%**), local coffee shops (**9%**) and other locations, such as airports, hotel lobbies and other on-the-go business travel locations.

Shared workspaces provide power, Wi-Fi and other amenities for teleworkers who choose to be remote but still like the feel of a productive workplace. Surveyed APJ teleworkers reported using **shared workspaces** (**21%**) and coffee shops (**14%**) more than their EMEA and NA counterparts.

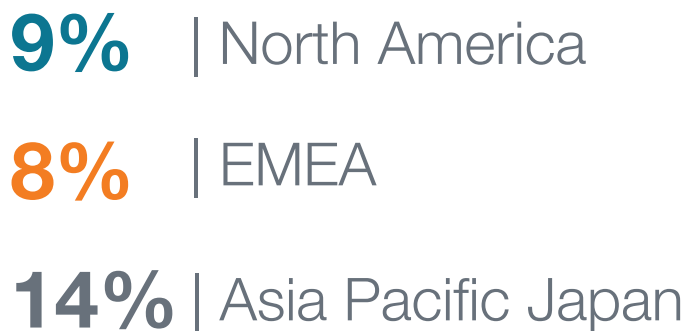
When you work remotely, where do you work from?



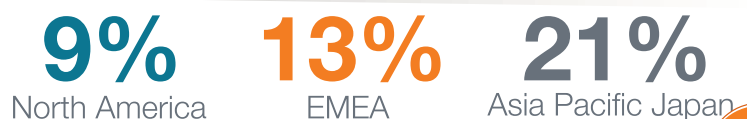
Home Office



Local Coffee Shop



Shared Workspace



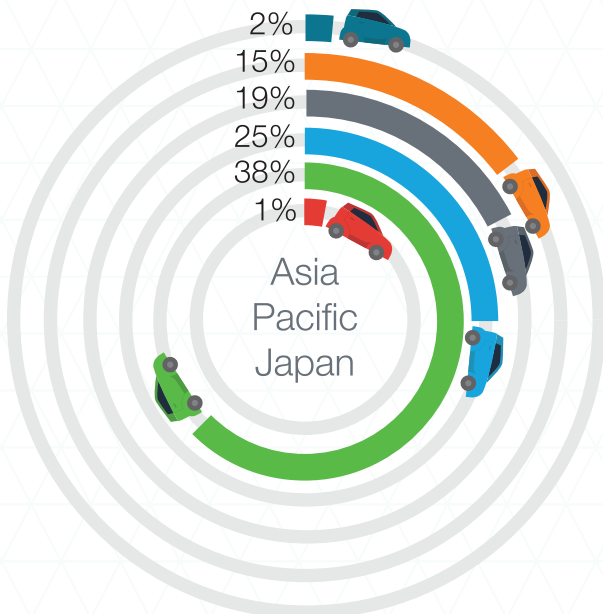
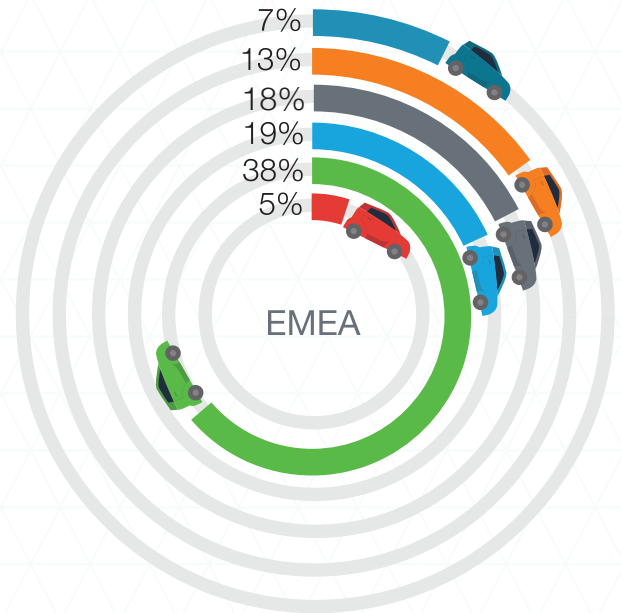
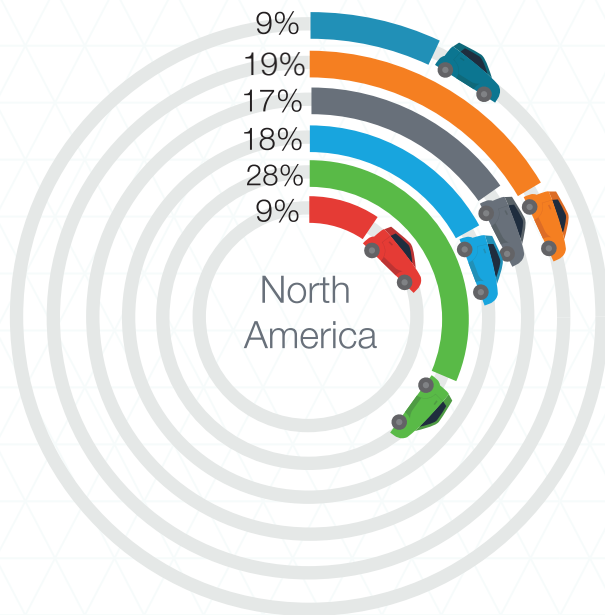
Death of the Long Commute //

Thanks to **flexible work** options, teleworkers are able to skip long commutes into the office—at least part of the week. And for good reason: **21%** of surveyed **teleworkers** worldwide commute over 60 minutes, and **19%** reported a 45-60 minute commute.

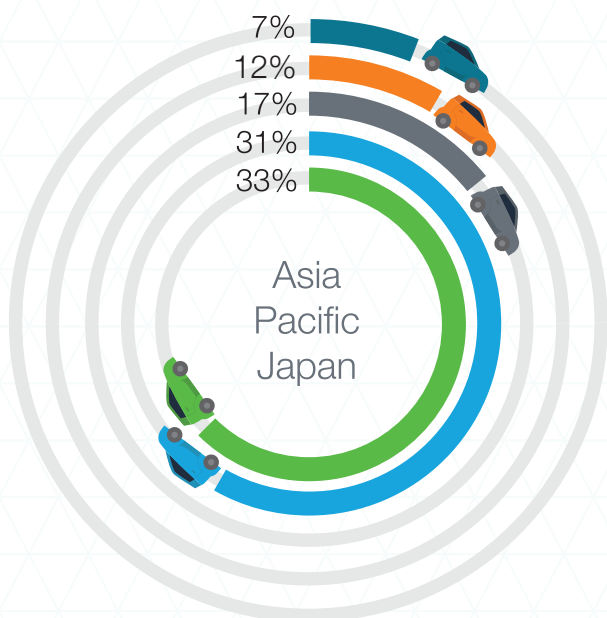
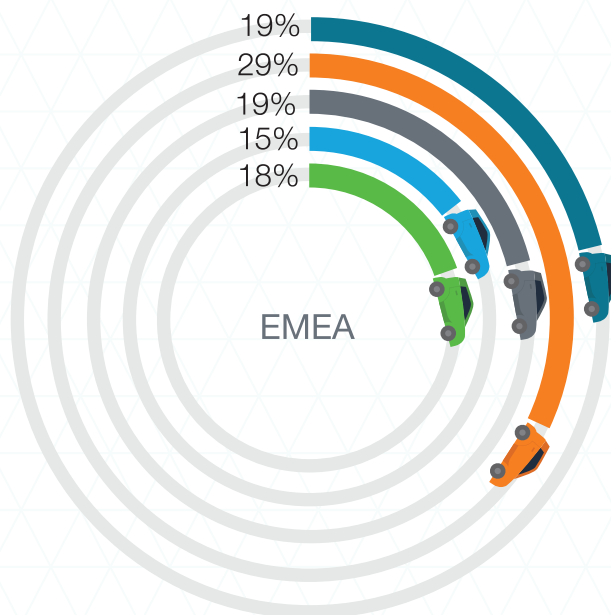
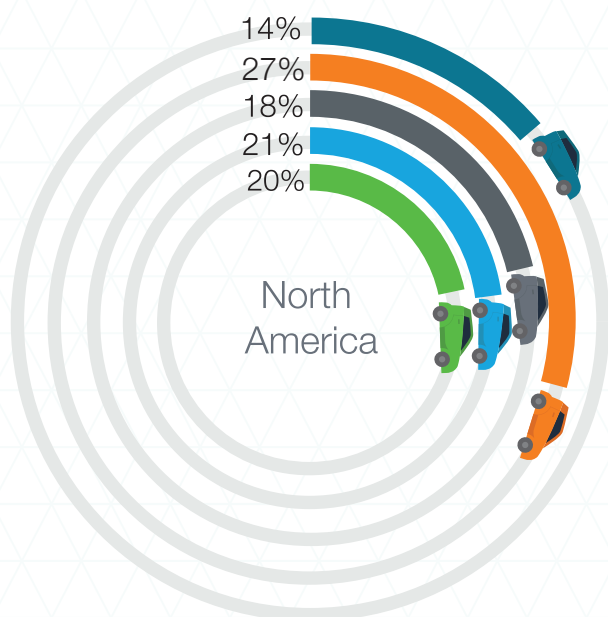
Non-teleworkers tend to live closer to work than teleworkers (**36%** worldwide have a commute less than 30 minutes), but **21%** commute over 60 minutes. Like their **flexible working** colleagues, APJ non-teleworkers also reported the longest commute times of all the regions.



Teleworkers: How long is your roundtrip commute to work everyday?



Non-Teleworkers: How long is your roundtrip commute to work everyday?



Technology Powers Telecommuting



Advances in technology and the rapid consumer adoption of mobile devices are transforming the landscape of the modern workplace. The traditional 9-to-5, in-office setting is giving way to a new always-available digital office, and in turn, is changing how **knowledge workers** function in their roles.

To accommodate the rapidly changing idea of a modern workplace, companies are supporting workers' mobile work and Internet usage preferences in order to ensure a productive work environment. Global businesses are providing a virtual work environment that is not only productive, but secures company data. PGI's survey revealed that the top five company-issued technologies used to work remotely are laptop computers, email, virtual private network (VPN) software, audio conferencing and corporate intranet.

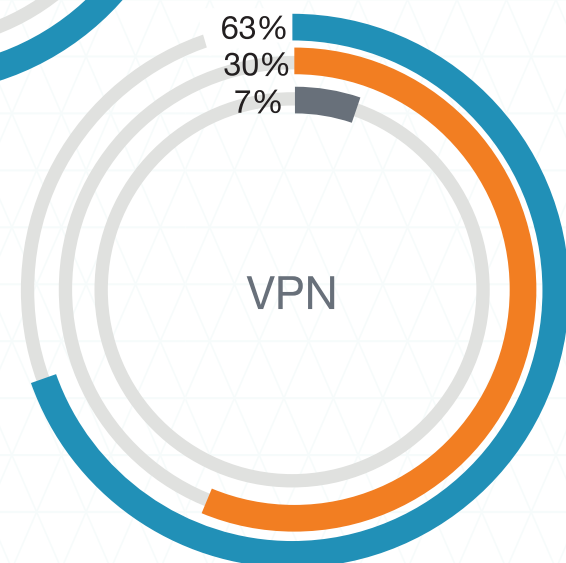
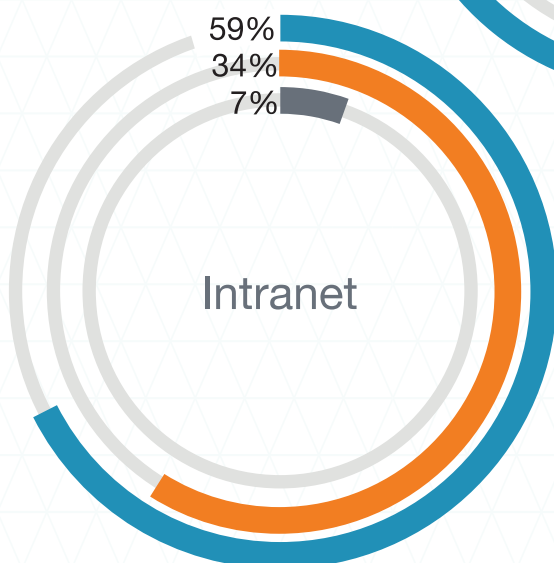
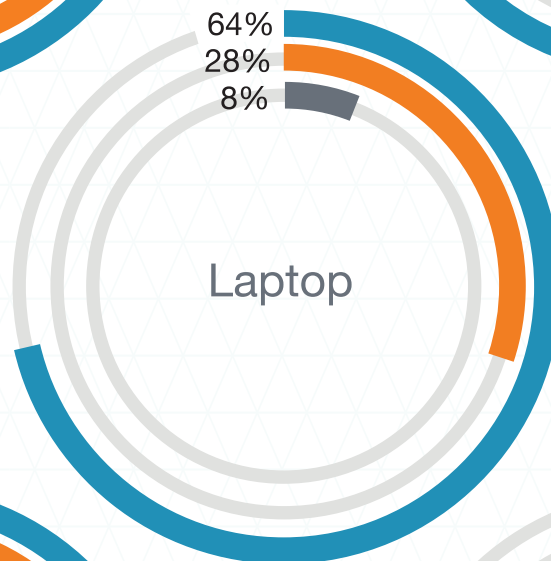
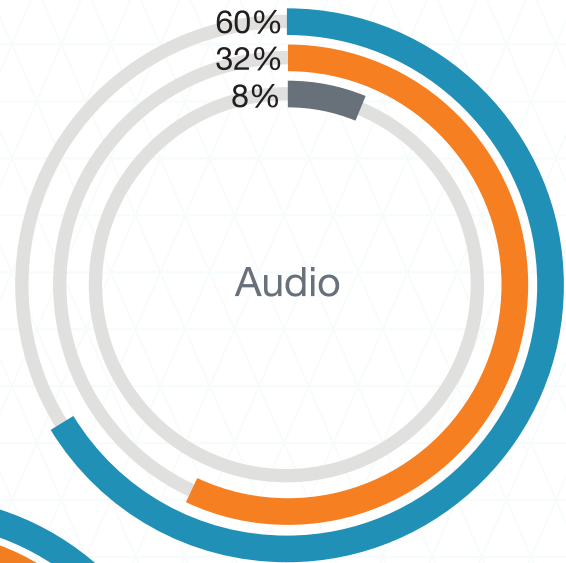
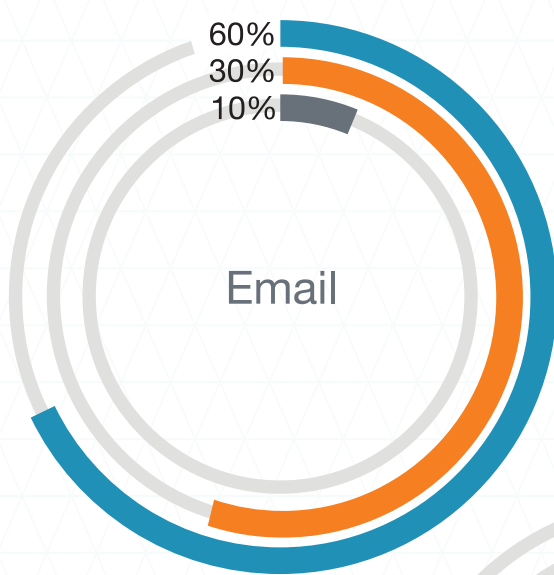
Smartphones ranked sixth on this list globally, and more than **50%** of North American respondents admitted to using their personal smartphones to conduct business-related activities.

Remote workers also reported using their own Internet, with **25%** of those surveyed stating they used company-issued Internet and **27%** using company-issued Wi-Fi when remote.

“**The traditional office setting is giving way to a new digital office.**”

What company-issued technologies do you use to work remotely?

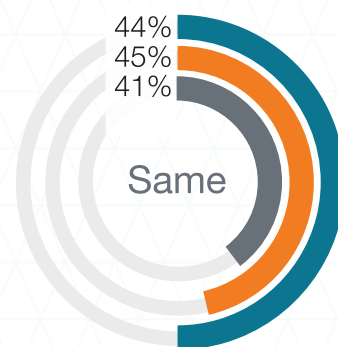
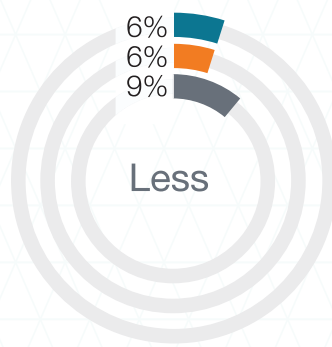
● North America ● EMEA ● Asia Pacific Japan



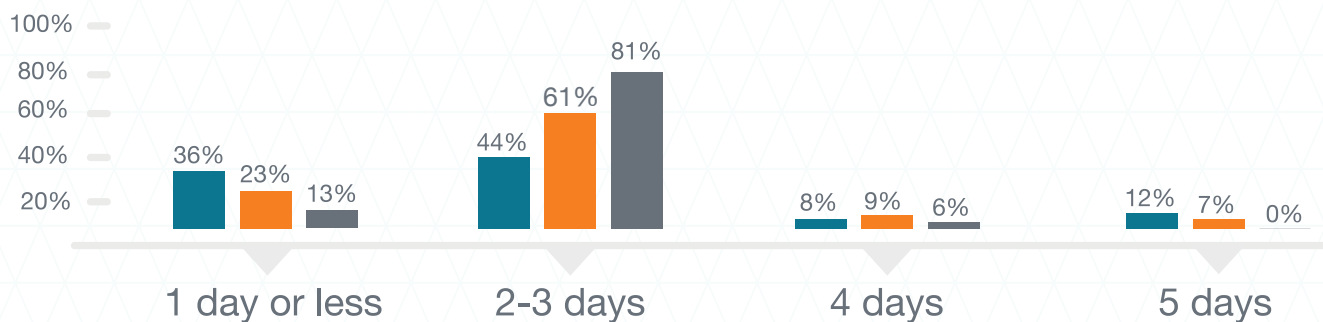
EMPLOYEES WANT MORE REMOTE WORK

Over **50%** of teleworkers in all regions said they want to work remotely more often. With perks like better work-life balance and reduced or eliminated commutes, **60%** of respondents worldwide said they would resign from their current position to take a similar job with the same pay if it allowed them to work from home full time.

Do you want to work remotely more or less often?



If more, how often do you want to work remotely in the average week?

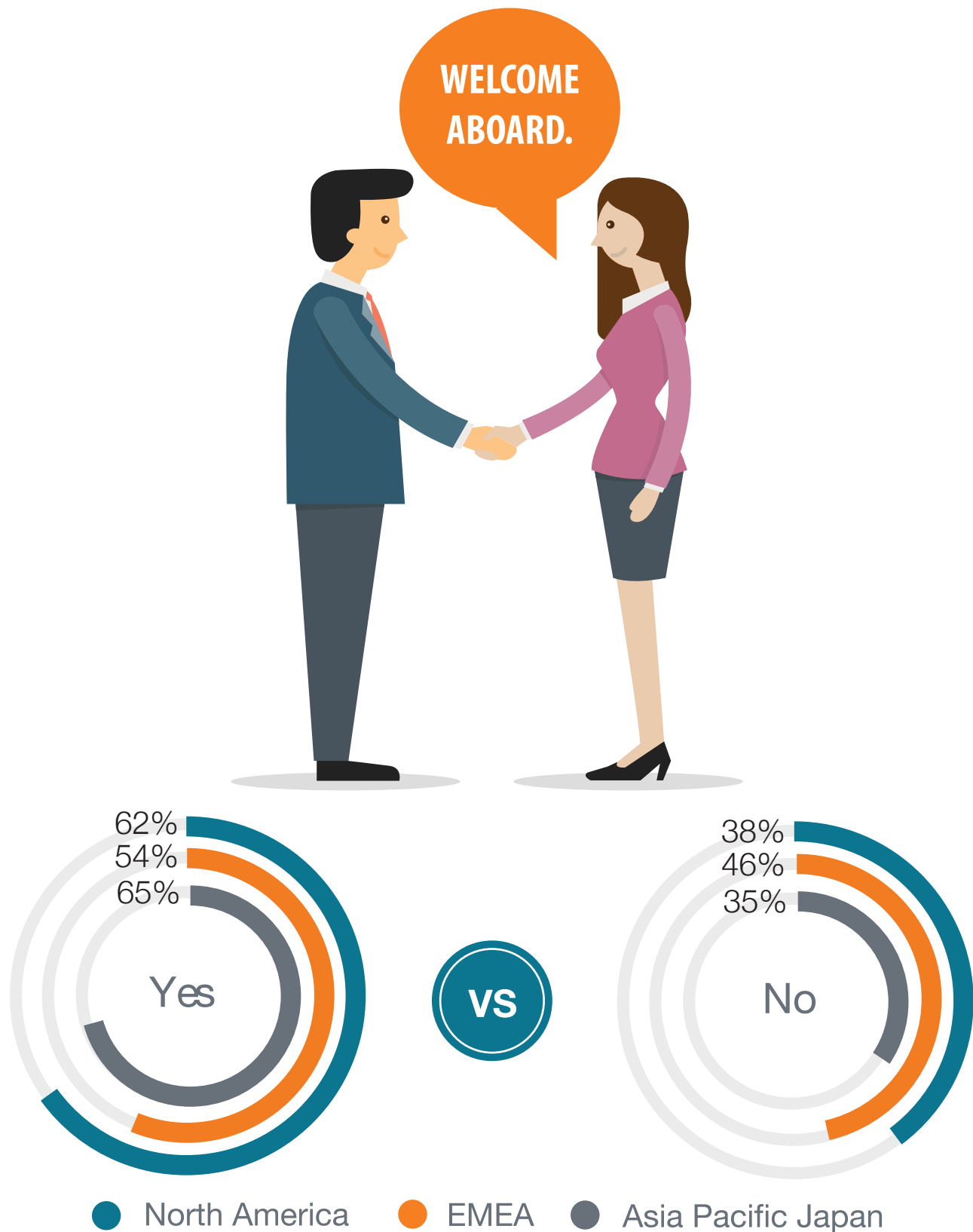


KEY

- North America
- EMEA
- Asia Pacific Japan



If a similar job at the same salary enabled you to work from home full-time, would you take the job?



I PART FOUR

OBSTACLES REMAINING FOR TELEWORKERS.



Despite the tremendous growth and impact of flex work, not all knowledge workers are empowered and enabled to work outside the office.

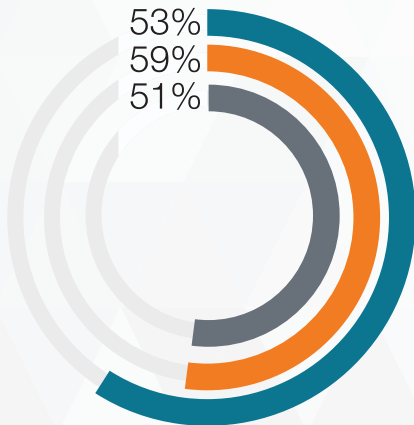
Why Many Global Knowledge Workers Haven't Left the Office

By and large, non-teleworkers around the world (**54%**) said **telecommuting** simply isn't an option in their role.

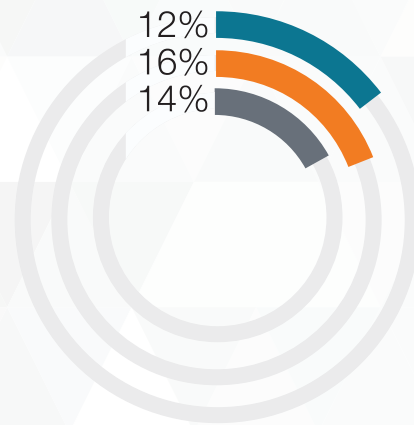
Currently, why do you work only in an office?

● North America ● EMEA ● Asia Pacific Japan

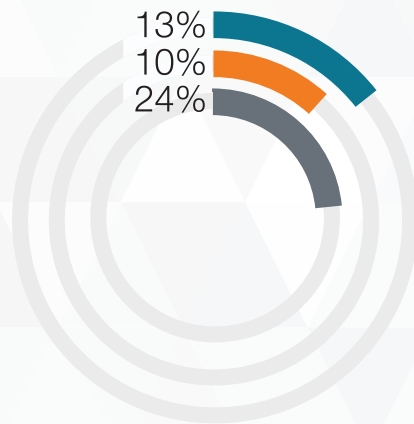
Not an option in my role



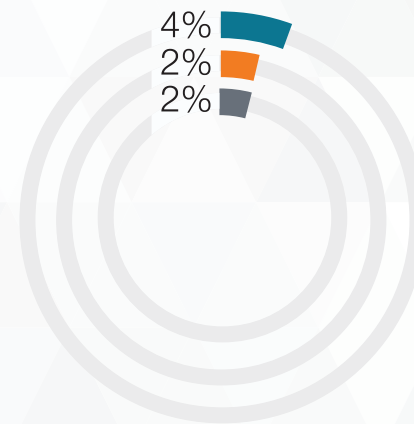
Don't have the tools for working remotely



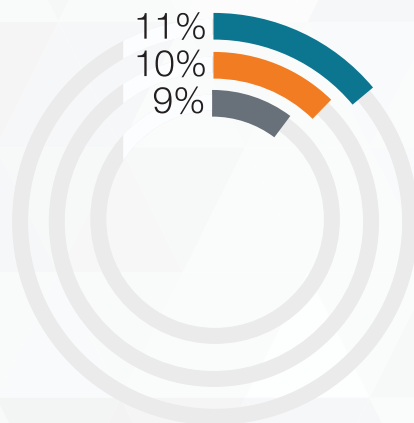
Need the structure of going into the office everyday



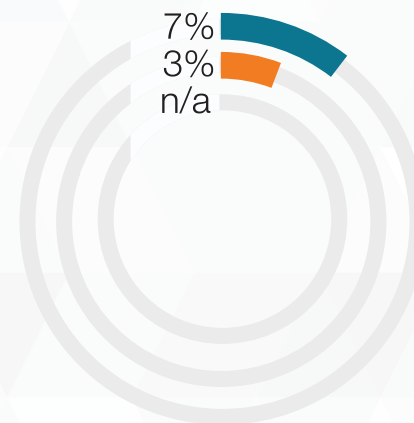
Don't want to be looked over for a promotion or pay raise



Need the socialization



Other



Overcoming Telework Pitfalls

According to the survey, the top three perceived negative aspects of telework are alienation, poor communication and too many distractions.

A majority of the surveyed global **knowledge workers** (roughly **53%**) said their companies do not have a formal **telecommuting** or **flexible work** policy. In fact, EMEA is the only global region that reported more telecommuting policies than not (**59%**).

What do you think are the top three negative aspects of working remotely?

Teleworkers	North America	EMEA	Asia Pacific Japan
1 RANK	Alienation, feeling of disconnect	Alienation, feeling of disconnect	Question not asked
2 RANK	Poor communication	Poor communication	Question not asked
3 RANK	Too many distractions	Not positively accepted	Question not asked

What do you think are the top three negative aspects of working remotely?



Non-Teleworkers

North America

EMEA

Asia Pacific Japan



Alienation, feeling
of disconnect

Alienation, feeling
of disconnect

Alienation, feeling
of disconnect



Poor
communication

Poor
communication

Poor
communication



Too many
distractions

Struggles with
technology

Too many
distractions

Does your company have a formal telecommuting or flexible work policy?

● North America ● EMEA ● Asia Pacific Japan

42%

40%

YES

59%

VS

58%

60%

NO

41%



Non-Teleworkers Want to Leave the Cubicle

Most surveyed non-teleworkers reported that they want to work outside the office (**66%**). And those that want to telework don't want to work remotely full time; **96%** of non-teleworkers worldwide that want to telecommute as little as one, two or three days per week to work outside the office.

Would you like to occasionally work outside the office?



If yes, how often?



Sponsored By

The “PGi Global Telework” survey and report was brought to you by PGi, the world’s largest dedicated provider of collaboration software and services. Join the 20,000-plus global flex workers who are better managing their days with **iMeet® Agenday™**, PGi’s free smart calendar application.

To learn more about PGi, visit pgi.com.

To learn more about **telecommuting**, including business value, tech and tools, best practices and how to make the case for **flexible work** in your organization, visit [The Future of Business Collaboration blog](#).

