

Future Workforce Study

United Kingdom | 2016



United Kingdom

The majority of the UK workforce is happy with their jobs and technology plays an important part in their satisfaction with 1 in 5 of us ready to quit if our tech is not up to scratch. There is a concern that employers are not keeping pace with global or consumer technology trends.

Despite that focus on technology, we are still creatures of habit, with many of us preferring in-person interactions at work and **keeping our work and personal lives separate**.

Millennials, the future of the UK workforce, are keenly influenced by the technology available to them at work. **That generation is more adept at working remotely**, a trend that is closely linked to happiness at work, and has a greater propensity to contribute to the 'sharing economy'.

There is a huge opportunity for UK businesses to empower and retain their employees through technology - augmented and virtual reality are cited as areas of keen interest by UK employees. If businesses can unlock the potential these technologies, **the future is bright**.



Key Findings



1

One fifth of the UK workforce would quit due to poor workplace technology.

20%

of the UK workforce would quit due to poor workplace technology. 3 in 4 employees are satisfied with their current workplace technology and appreciate that it makes their job easier.



Remote and Millennial employees are more likely to quit a job due to substandard tech while a substantial **7 in 10 agree that tech influences their new job choices.**


Few workplaces are early adopters of technology and **nearly half of employees (47%) say their current workspace is not “smart” enough.**

Most employees **don’t anticipate working in a “smart” office environment in the next 5 years (43%).**



2

A worker's home technology is still more likely to be cutting edge.



36%

of UK employees say their home technology is more cutting edge than their technology at work. UK employees think that future technologies will bring opportunities for productivity but, for now, home technology leads the way.



Very few British companies **are seen as early adopters of innovative technology** by their employees – regardless of size.



3

Half of UK employees would try augmented/virtual reality products at work.

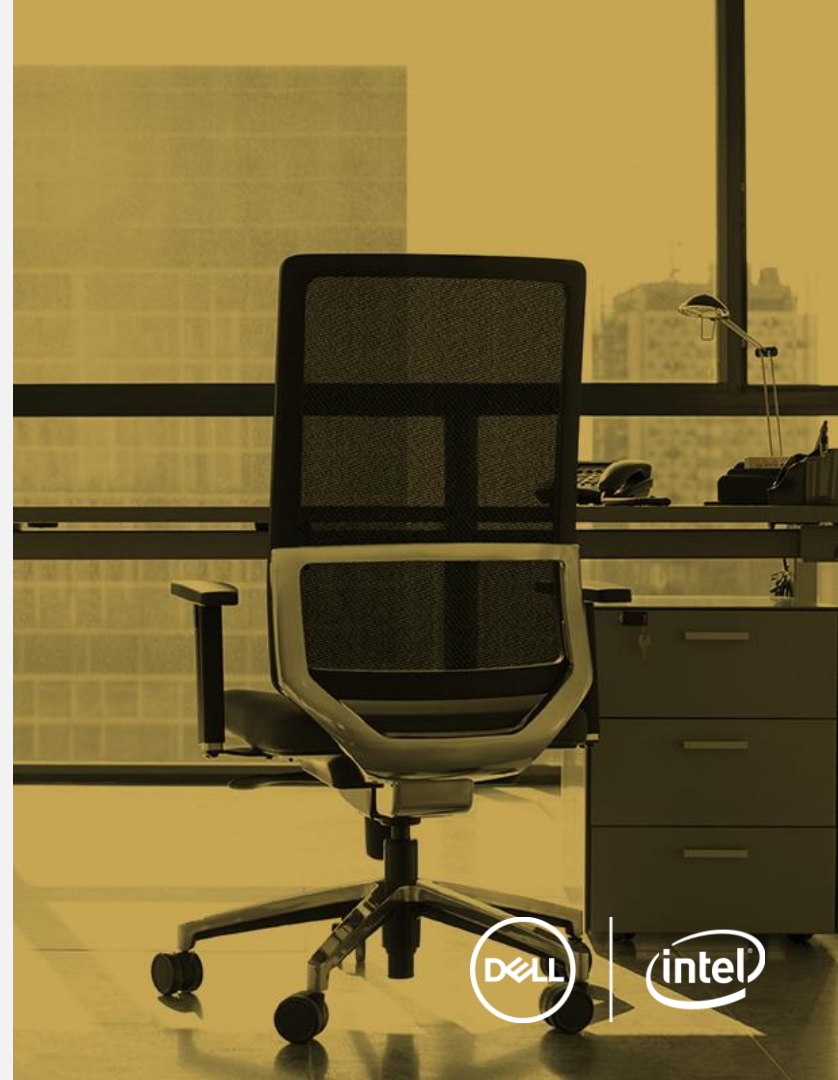
67%

Millennials (67%) and remote workers (66%) are the most willing to use AR/VR in a professional setting.

Remote employees (50%) and Millennials (54%) are also most likely to agree that their jobs could be made easier through the use of AI — especially by eliminating complex repetitive tasks.



In particular, the idea of using AR/VR for problem solving/visualization (27%) and training opportunities (23%) most excite millennials.



4

Working outside of the office makes you happier.

87%

While 4 in 5 UK workers are happy with their jobs, remote workers (87% happy) surface as the happiest subgroup. In good news for employers, over half of remote employees (63%) feel that they get the technology support they need to work remotely.



5

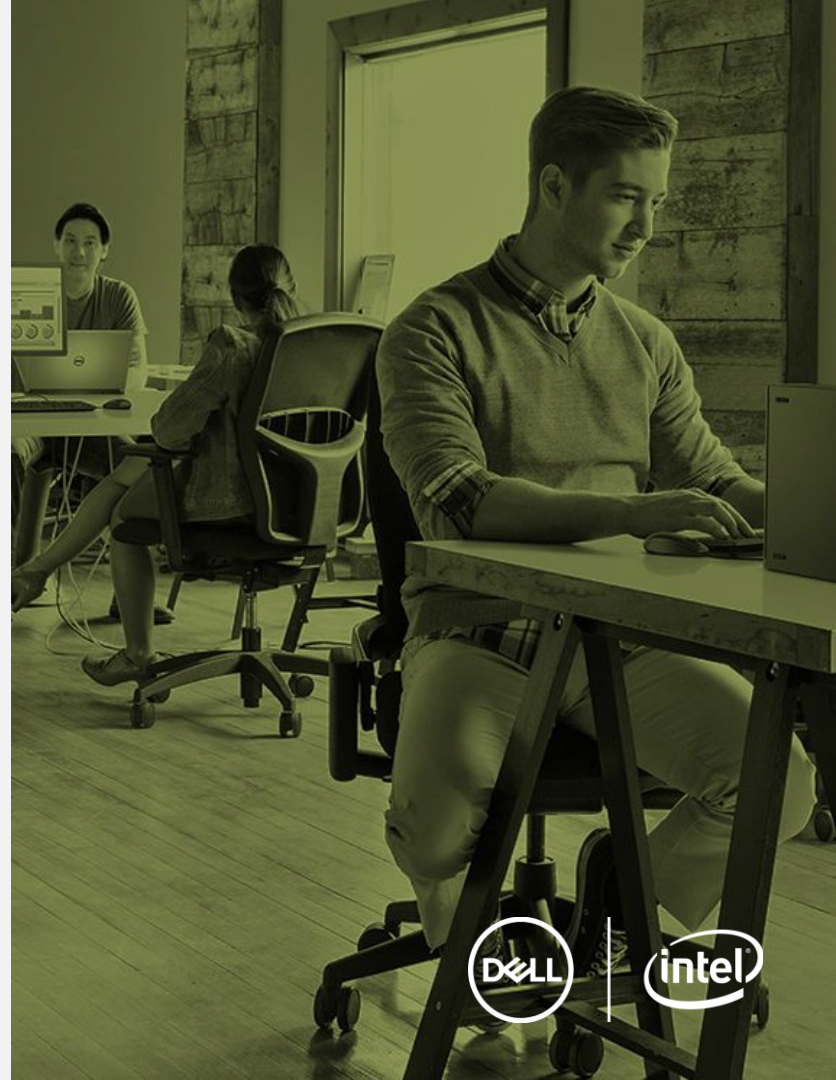
In contrast to the global trend, UK employees want to talk to their colleagues in person.

84%

2 out of 3 UK employees prefer to speak face to face with their colleagues and 84% say that in-person communications are important for productivity. This is in contrast to the global trend when face to face communication is less desirable.



However, this trend may change – more British Millennials (18–34) than employees over 35 **agree that remote teams and better communications technology will make face to face communications obsolete (44% vs. 35%).**



6

UK employees want to keep their work and personal lives separate.

52%

While split on whether they consider their job part of their identity (52%) or just something to pay the bills (48%), there's a strong sense across the board that life begins at the end of the work day (70%).



British employees report **keeping their personal and work lives mostly separate (80%)**.

Remote employees are **more apt to integrate their personal and professional lives (30%)**.

Half of British employees say they **don't use their work devices for personal purposes**.



7

Millennials are looking beyond the traditional workplace.

38%

While British employees overall say they do their best work at the office, Millennials are increasingly looking to remote locations for work — whether home or public places — 38% say they do their best work outside of the office. As such, they're most likely to work regularly outside of the office.



8

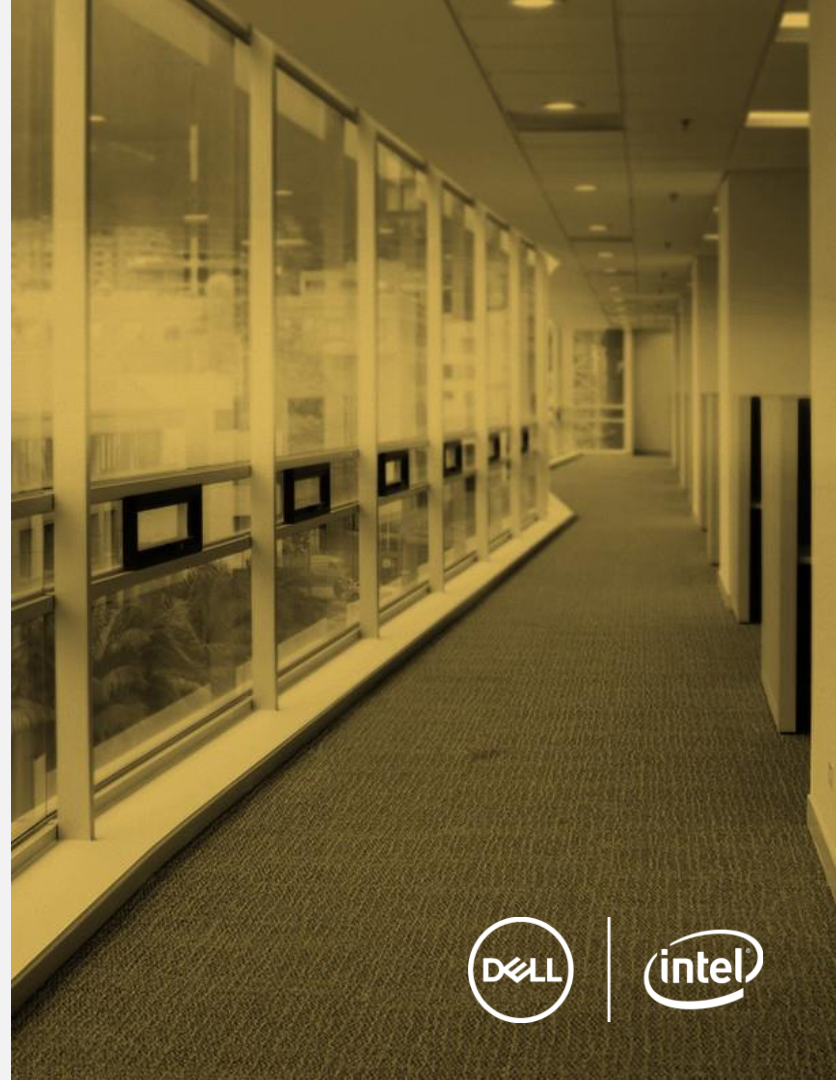
Millennials are taking advantage of the sharing economy much more than older workers.

60%

Millennials are most likely to say they'll participate in the sharing economy — 60% say they plan to buy and/or sell goods and services. However the understanding and enthusiasm for the sharing economy in the UK lags behind the global trend. A third of all British employees say they won't participate and a quarter say they don't know.



Millennials recognize that the sharing economy can **make goods/services cheaper (36%)** and **offer additional choices (27%)**.



Key Supporting Slides



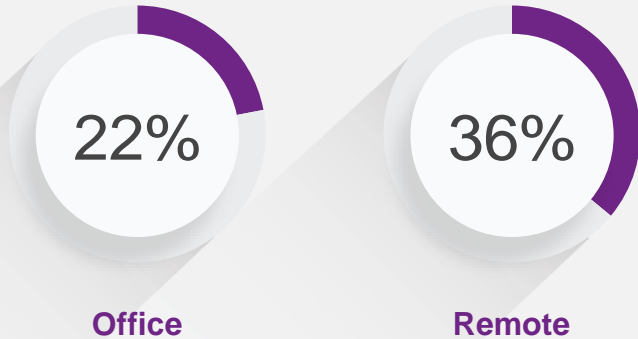
1

One fifth of the UK workforce would quit due to poor workplace technology.

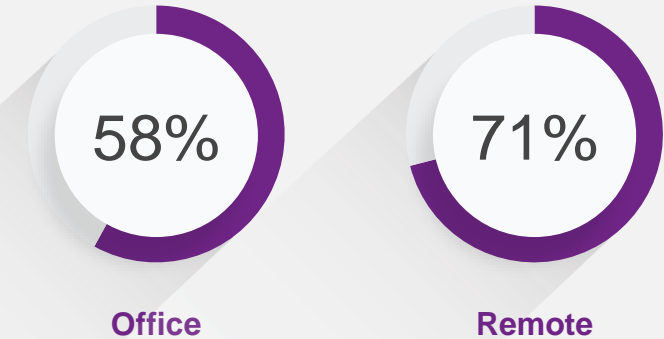


Remote employees more likely to quit a job with substandard tech — 7 in 10 agree tech influences new job choice

Likely to quit a job with substandard tech



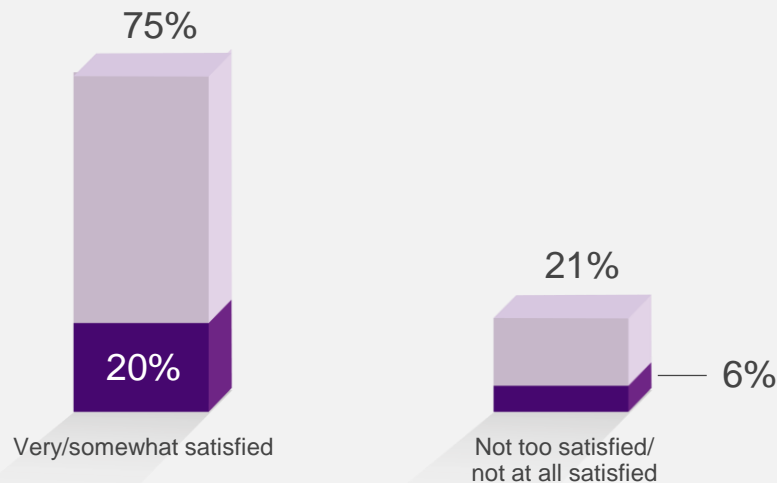
Workplace tech would have influence when deciding to take a new job



Three quarters of UK employees are satisfied with their workplace technology

And the majority agree that technology makes their jobs easier to perform.

How satisfied are you with the technology in your workspace?



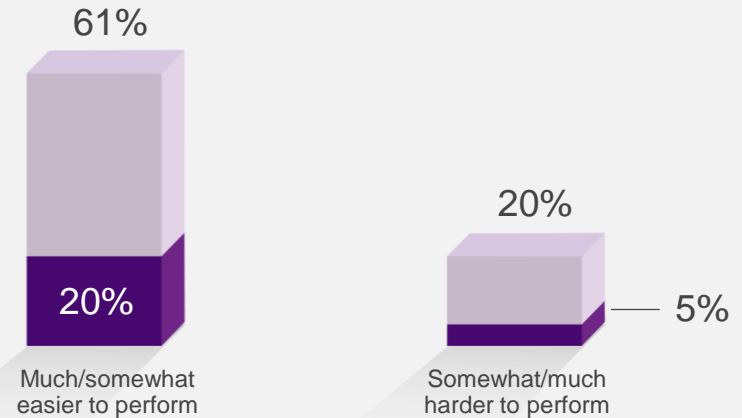
*Darker colors indicate stronger intensity of answer



Three quarters of UK employees are satisfied with their workplace technology

And the majority agree that technology makes their jobs easier to perform.

***Does the technology you use at work
make your responsibilities...***



*Darker colors indicate stronger intensity of answer
**15% of Respondents said "It has no effect"



Britons are split on expectations regarding “smart” offices — 1 in 5 say they’re not at all likely to be in one in five years

Whereas over half of the global workforce expects to be in a “smart” office within five years.

French (57%) and South African (63%) employees are in the majority optimistic that they’ll be in an IoT-enabled office in 5 years, while UK (43%) and German employees (36%) are less sure



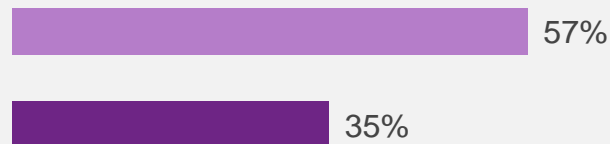
Britons are split on expectations regarding “smart” offices — 1 in 5 say they’re not at all likely to be in one in five years

How likely do you think you will be working in a “smart” office that uses the Internet of Things in the next five years?

UK



Global



Likely
Not Likely

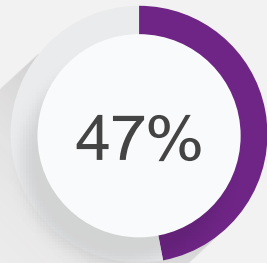
*16% of Respondents said “Don’t know”



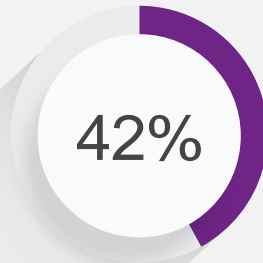
Half of UK employees say their workspace isn't smart enough for them

While nearly no employees in the UK would describe their offices as too smart.

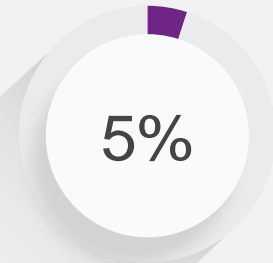
When thinking about your current workspace, is it...?



Not smart enough



As smart as
I want it to be



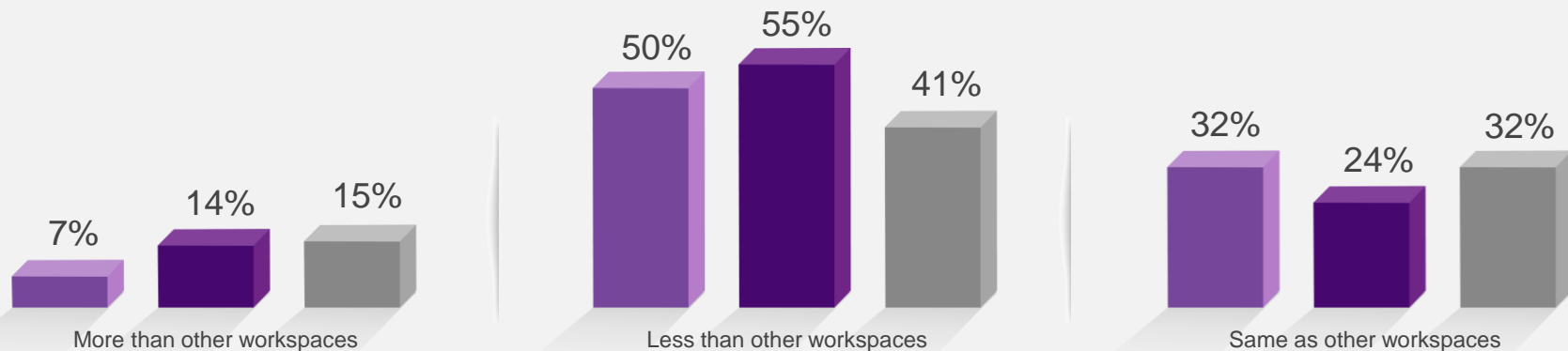
Too smart



Very few British companies are early adopters of innovative technology — regardless of size

Half of employees of Small Businesses and Medium Businesses say their companies update their technology less than others.

As far as you know, would you say your workspace updates its technology... (Among)



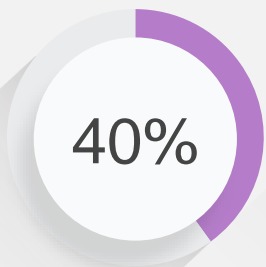
■ Small Business
■ Medium Business
■ Large Enterprise



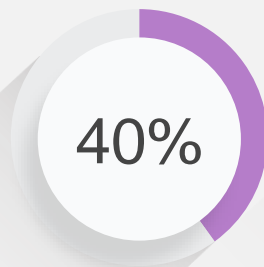
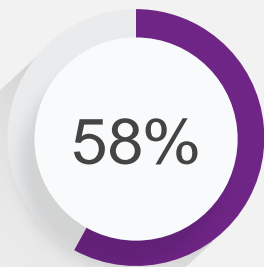
But, British workers aren't sold on high-tech perks; unlike much of the rest of the global workforce

As many British workers say they'd be happy with low-tech perks at work as high-tech ones.

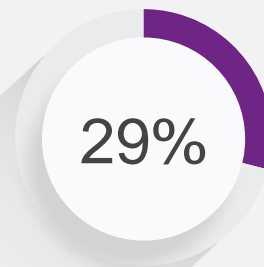
Which of the following would you rather have in the workspace?



High-tech perks like Internet of Things, augmented/virtual reality or AI-assisted features



Low-tech perks like a ping pong table, free food or an office dog



UK
Global

*34% of Respondents said "Don't know"



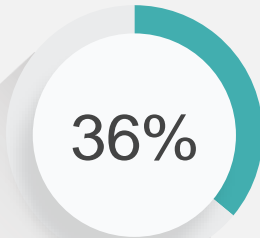
2

A worker's home technology is still more likely to be cutting edge.



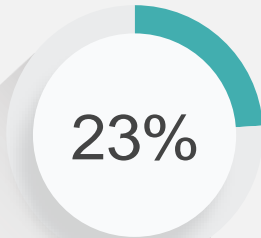
Home technology is more cutting edge or on par with what UK employees have in their workspace

Compared to the workspace, is the technology you use at home...



36%

More cutting edge
than at work



23%

Less cutting edge
than at work



34%

On par with the
technology I use at work

*7% of Respondents said "Don't know"



Very few British companies are early adopters of innovative technology — regardless of size

Half of employees of Small Business and Medium Business say their companies update their technology less than others.

German employees are more likely to see their workspaces as keeping up with trends — 47% of Small Business, 38% of Medium Business and 43% of Large Enterprise say their workspace updates tech about the same amount as others

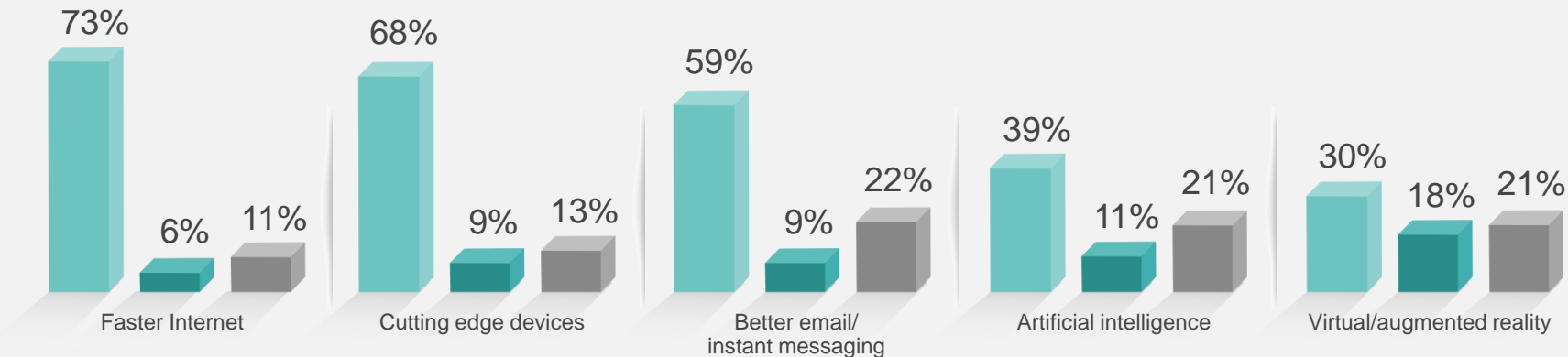
French workspaces more likely to be early adopters: 22% of Small Business, 30% of Medium Business and 20% of Large Enterprise say their company updates tech more than others



British employees think future technologies will bring opportunities for productivity

With the most excitement around faster Internet, cutting edge devices and better communications — not AI and AR/VR.

For each of the following technology advancements in the workspace, please say whether it would primarily lead to more...



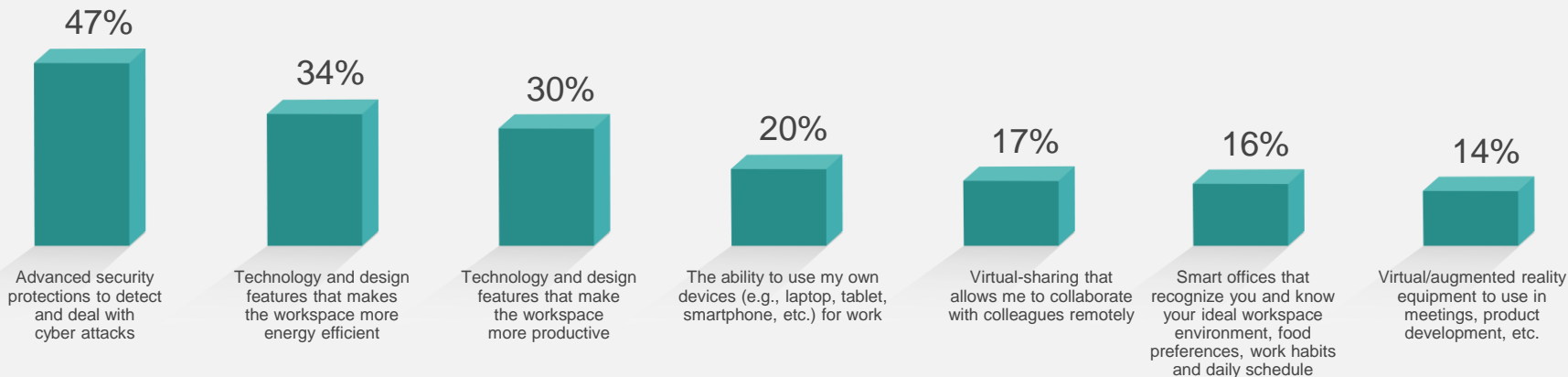
More Productivity
More Procrastination
No Impact



Above all, smart workplaces are expected to have advanced security

In addition to security protections, UK employees think energy efficiency and a more productive workplace are also very important.

*Thinking about your ideal workspace, please rate how important you think it is for it to have...
(Showing % very important)*



- More Productivity
- More Procrastination
- No Impact



3

Half of UK employees would try augmented/virtual reality products at work.



Half of UK employees would try augmented reality products at work — Millennials and remote employees are most interested

1 in 3, however, are not willing to do so.

Most willing to use AR/VR:

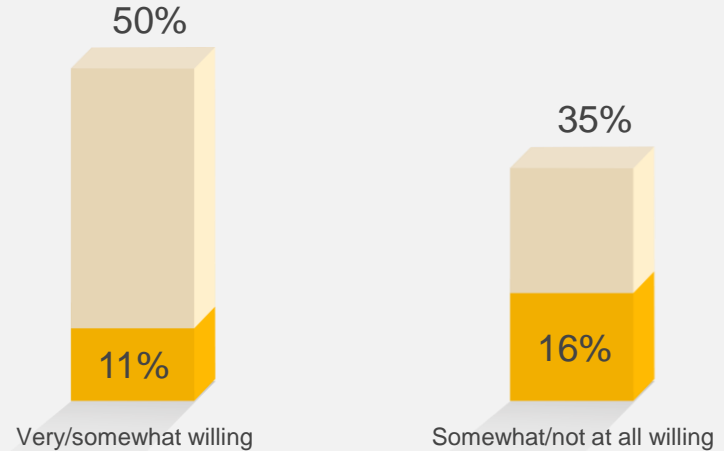
Millennials (18–34) – 67%

Remote Workers – 66%



Half of UK employees would try augmented reality products at work — Millennials and remote employees are most interested

How willing would you be to use augmented/virtual reality products in your professional life?



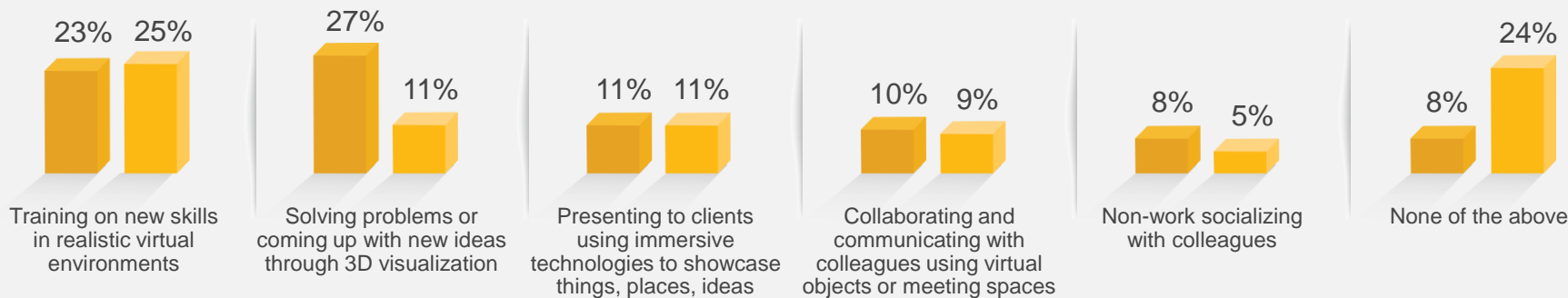
*Darker colors indicate stronger intensity of answer
**14% of Respondents said "It has no effect"



Training and problem solving are most exciting opportunities to use AR/VR — especially for Millennials

Millennials are 3x more likely to be excited to use AR/VR at work than older employees.

What aspects of your work would you be most excited to use augmented/virtual reality for?



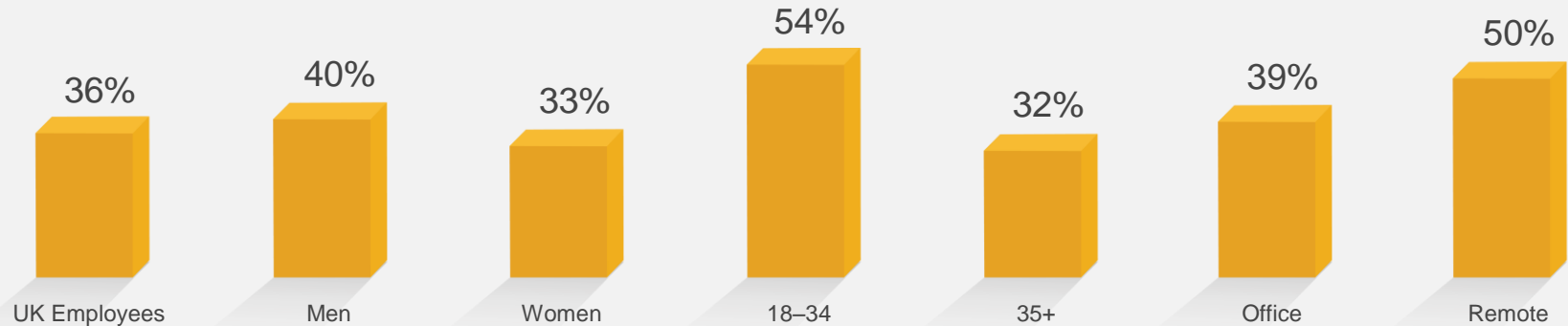
Millennials
Non-Millennials

*29% of Respondents said "Don't know"



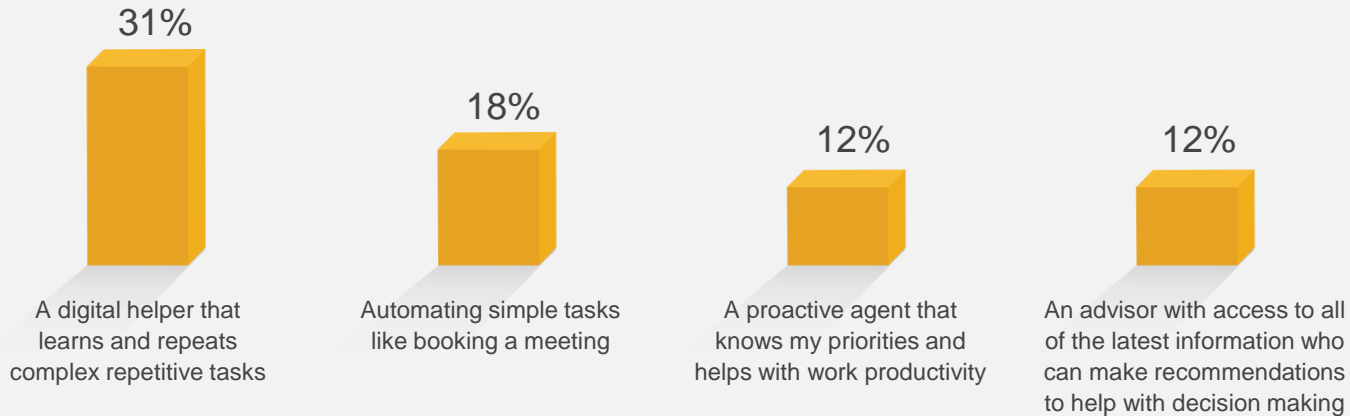
Remote employees and Millennials (18–34) are the most likely to agree their jobs could be made easier through the use of AI

Thinking about your own job, do you agree or disagree that it could be made easier with the assistance of artificial intelligence?



AI's benefit lies in eliminating complex repetitive tasks from work — but 1/4 can't say what they're excited about

When thinking about the future implications of artificial intelligence, what excites you the most?



*25% of Respondents said "Don't know"



AI's benefit lies in eliminating complex repetitive tasks from work — but 1/4 can't say what they're excited about

	UK	FR	DE	ZA
A digital helper that learns and repeats complex repetitive tasks	31	30	31	26
Automating simple tasks like booking a meeting	18	22	16	17
A proactive agent that knows my priorities and helps with work productivity	12	20	14	24
An advisor with access to all of the latest information who can make recommendations to help with decision making	12	15	14	23
Other	2	0	2	1
Don't know	25	12	24	9



Top worries for AI are that robots will take jobs and integrate too much into the military and everyday life

Millennials and women are most concerned that they could lose their job to robots.

A robot will take my job:

Male – 19%

Female – 26%

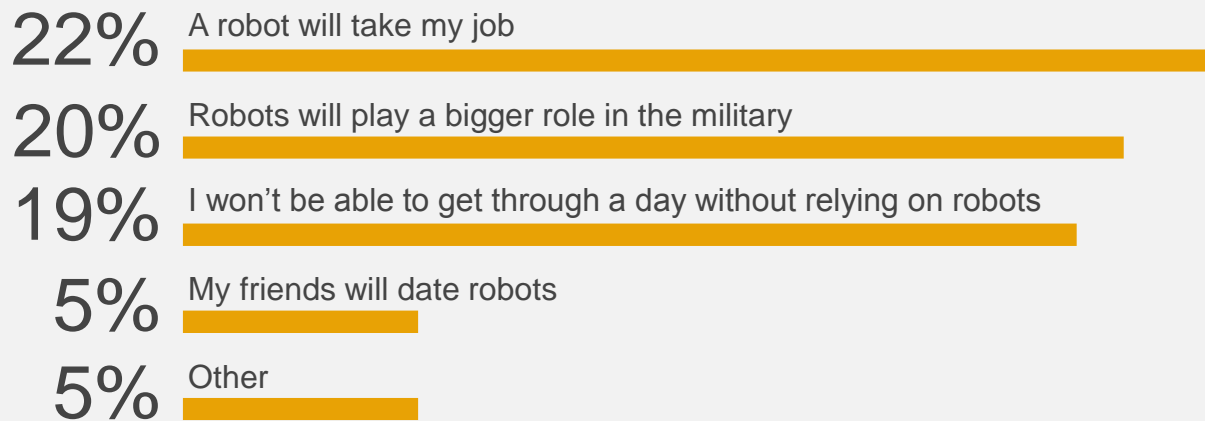
Millennials – 28%

35+ – 20%



Top worries for AI are that robots will take jobs and integrate too much into the military and everyday life

When thinking about the future implications of artificial intelligence, what excites you the most?



*29% of Respondents said "Don't know"



4

Working outside of the office
makes you happier.



4 in 5 British workers are happy with their jobs

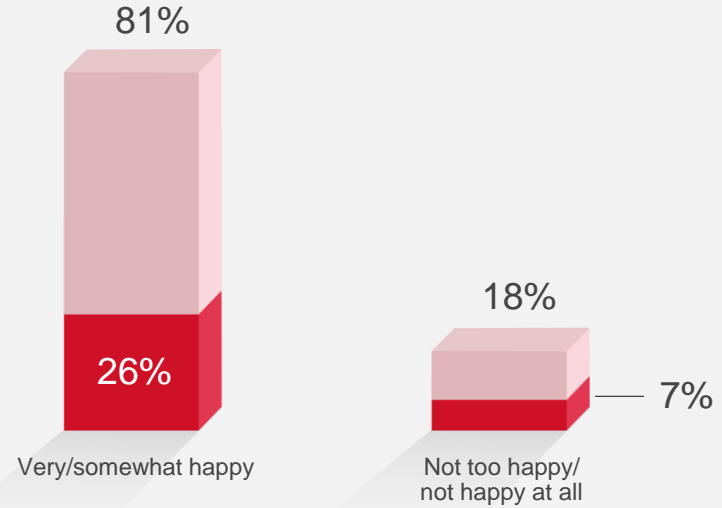
Remote workers (87% happy) surface as the happiest subgroup.

Female employees in
the UK are happier (85%)
than male employees (78%)



4 in 5 British workers are happy with their jobs

*When thinking about your job,
would you describe yourself as...*



*Darker colors indicate stronger intensity of answer

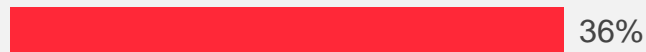


Remote employees feel like they're getting the support they need to work remotely

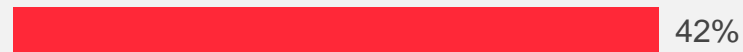
How much do you agree or disagree with the following statement?



While I'm travelling or working remotely, I feel like my employer will help me resolve any technology need I have in order to do my job.

Office Employees



Remote Employees



 Somewhat Agree
 Strongly Agree



5

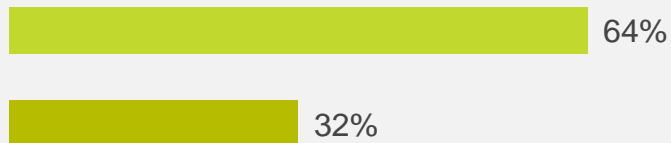
In contrast to the global trend,
UK employees want to talk
to their colleagues in person.



2 in 3 Britons prefer face to face conversations, 7 points higher than globally

And would you rather exchange conversation with a colleague face to face or remotely?

UK



Global



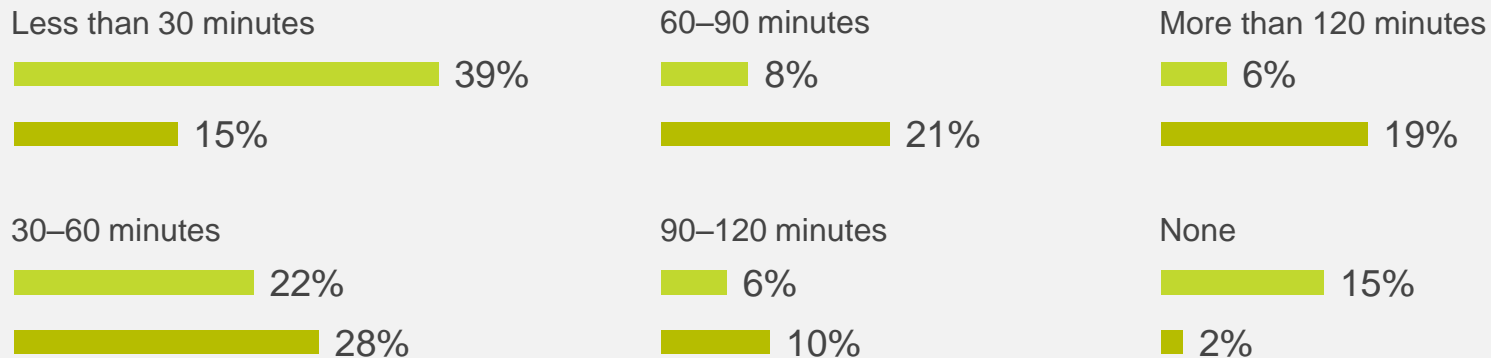
Face to Face
No Preference
or Remote



While face to face communications are preferred, most in the UK communicate at work remotely and in-person

Though remote conversations are generally shorter — 60 minutes or less — than in-person ones.

On an average day at work, approximately how many minutes of conversation do you exchange with colleagues?



Remotely
In-Person




Most say in-person communications are important for productivity

Which of the following is closer to your view?



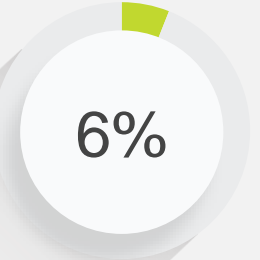
84%

In-person interactions with colleagues are **necessary to foster** a productive and professional work environment



10%

In-person interactions with colleagues at work are **unnecessary and inefficient**



6%

Don't know



British employees are significantly less likely to agree that face to face communications will become obsolete in the future than global employees

France (49%) and South Africa (61%) are most likely to see remote employees making face to face communications obsolete



British employees are significantly less likely to agree that face to face communications will become obsolete in the future than global employees

How much do you agree or disagree with the following statement?

Remote teams and better communication technology will make face to face communication obsolete.

UK



Global



Agree
Disagree

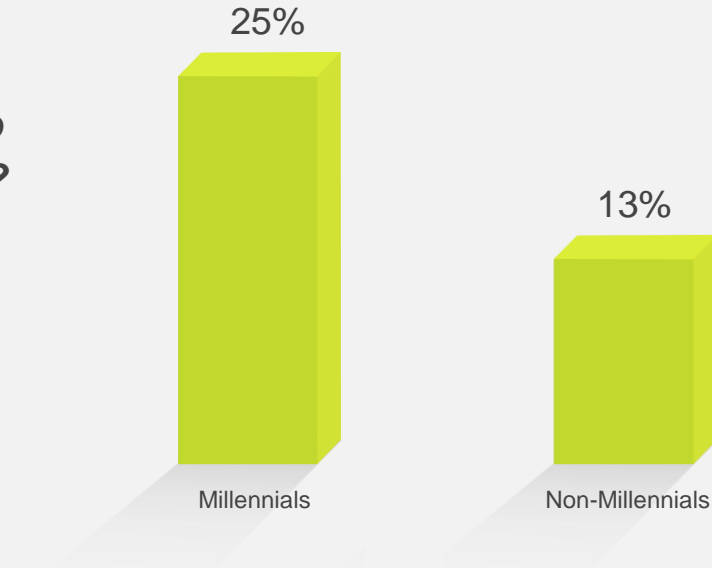
*10% of UK Respondents said "Don't know"



Millennials are both more likely to see the value of tech in collaboration — and recognize difficulties of face to face meetings

Which of the following plays the biggest role in making it easier to collaborate with your colleagues?

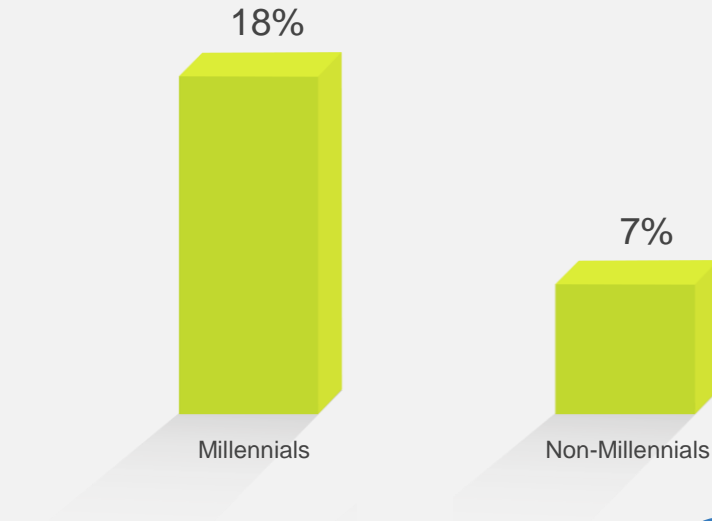
Having technology to that allows me to communicate with my colleagues.



Millennials are both more likely to see the value of tech in collaboration — and recognize difficulties of face to face meetings

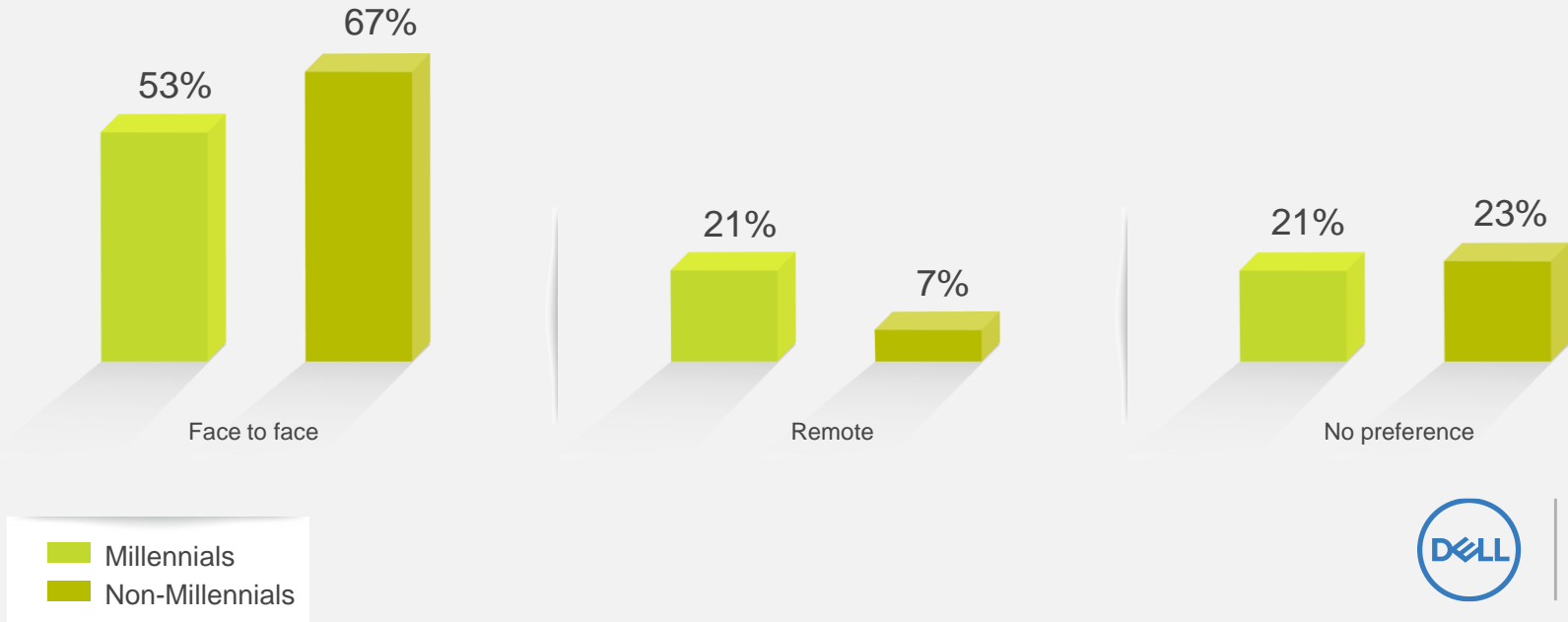
Which of the following is closer to your view?

In-person interactions with colleagues at work are unnecessary and inefficient.



Millennials are 3x more likely to prefer to interact with colleagues over phone or video as Non-Millennials

And would you rather exchange conversation with a colleague face to face or remotely?



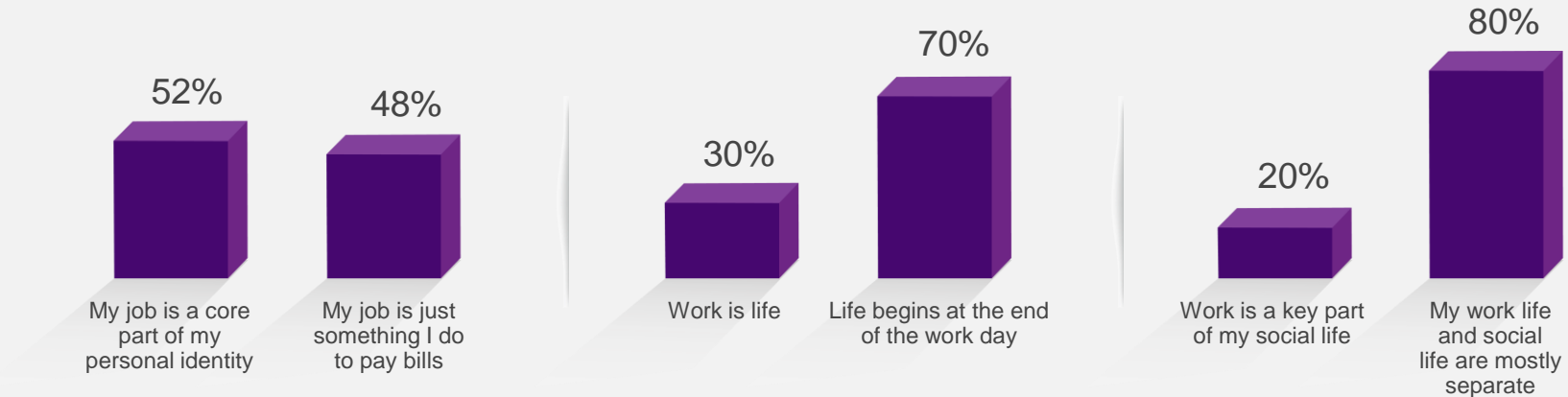
6

UK employees want to keep their work and personal lives separate.



While jobs are important to UK employees, personal and professional lives are largely separate

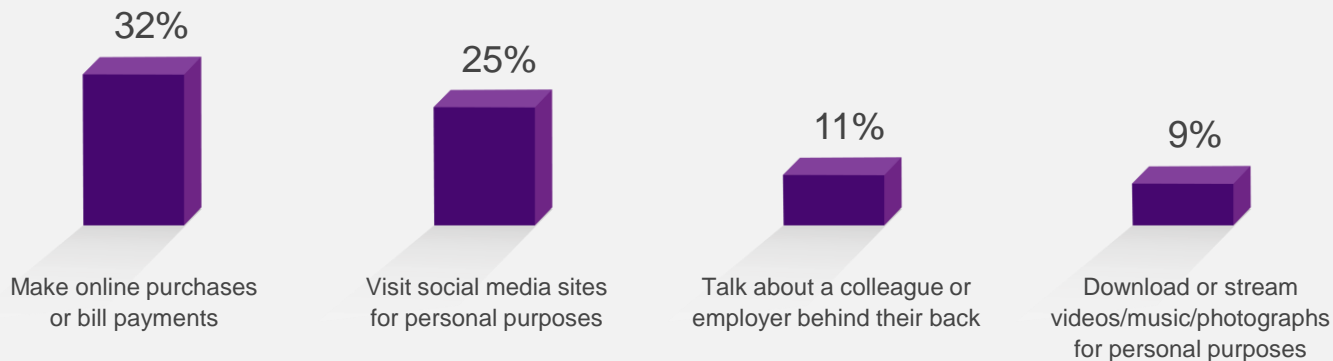
Which of the following is closer to your view?



Half of British employees say they don't use their work devices for personal purposes

Millennials are most likely to use a work device for online purchases and payments, and social media.

Have you used a work device to do any of the following? Please select all that apply.



*48% of Respondents said "None of the above"



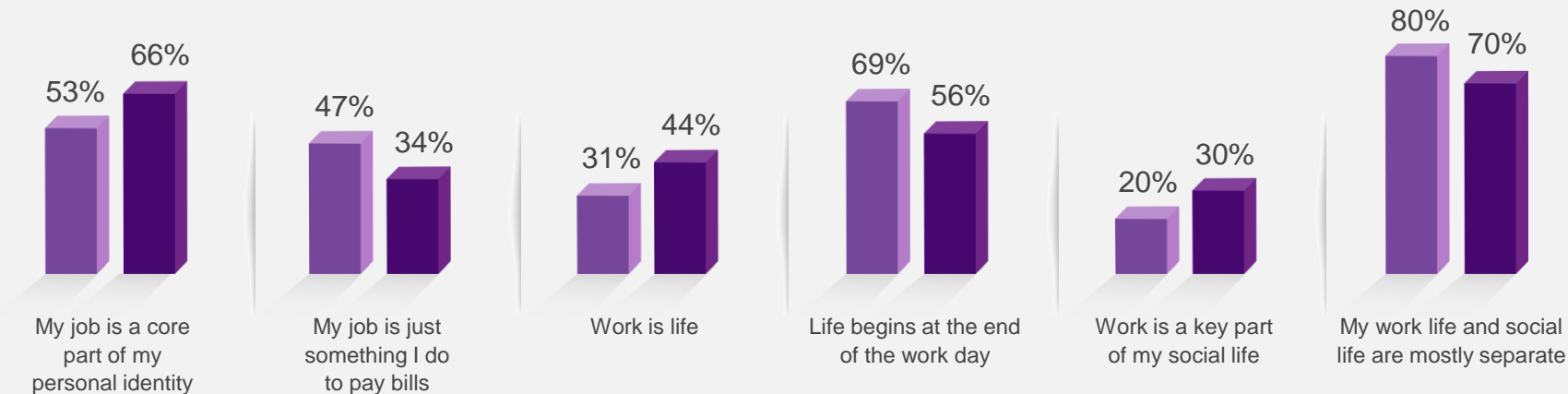
Half of British employees say they don't use their work devices for personal purposes

Have you used a work device to do any of the following? Please select all that apply.	Male	Female	18–34	35+	SB	MB	LE	Office	Remote
Make online purchases or bill payments	34	30	37	31	40	32	27	36	35
Visit social media sites for personal purposes	29	20	38	21	29	26	21	28	35
Talk about a colleague or employer behind their back	11	10	13	10	8	12	11	12	20
Download or stream videos/music/photographs for personal purposes	12	6	11	9	13	9	7	10	15
None of the above	43	53	37	50	44	44	55	43	34



Remote employees are more apt to integrate their personal and professional lives

Which of the following is closer to your view?



Office Employee
Remote Employee



7

Millennials are looking beyond
the traditional workplace.



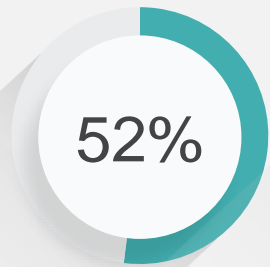
Overall, UK employees say they do their best work at office desks

38% of Millennials do their best work not in the office — whether at home, in public or outside

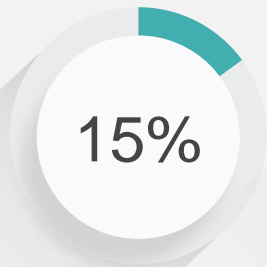


Overall, UK employees say they do their best work at office desks

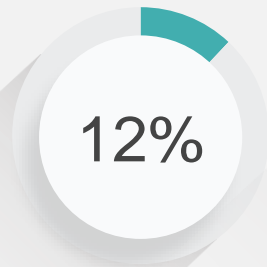
Where do you do your best work?



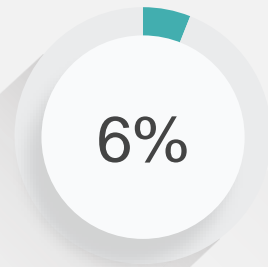
Office desk



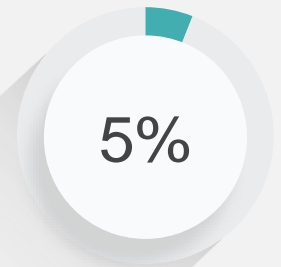
Home



Shared
office space



Public space



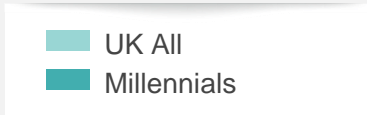
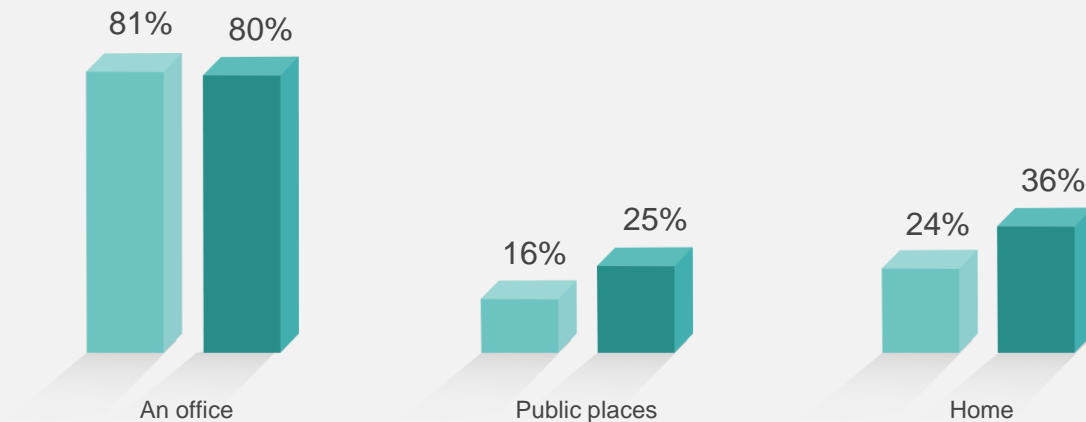
Outdoors

*6% of Respondents named "Other" places, and 5% said "Don't know"



But, Millennials are most likely to say they work regularly outside the office — either at home or in public

*How often, if at all, do you work from the following locations?
(Showing every day + a few times a week)*



8

Millennials are taking advantage of the sharing economy much more than older workers.



Only 42% of UK employees will participate in the sharing economy by next year

While half either don't plan to participate, or aren't sure.

How, if at all, do you plan on participating in the sharing economy in 2017?



*25% of Respondents said "Don't know"



Only 42% of UK employees will participate in the sharing economy by next year

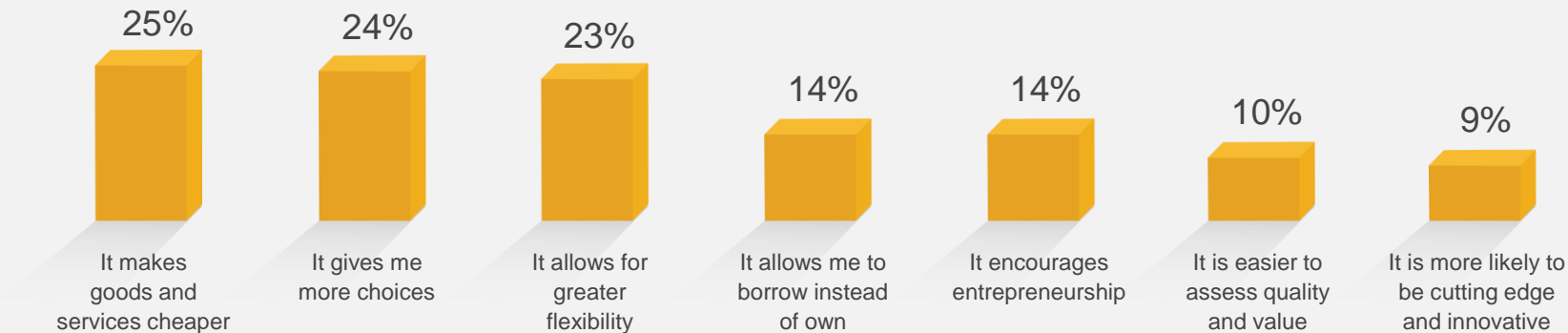
How, if at all, do you plan on participating in the sharing economy in 2017?	Male	Female	18-34	35+	SB	MB	LE	Office	Remote
Both by consuming and selling goods or services	18	18	20	17	18	19	17	20	28
By consuming goods or services	17	13	24	13	5	18	17	16	19
By selling goods or services	10	7	16	7	8	10	7	9	11
I won't participate in the sharing economy	32	35	22	37	35	29	38	30	25



The sharing economy is an opportunity for cheaper goods and services

Millennials are most likely to agree that the sharing economy will make things cheaper.

In your opinion, what are the two primary benefits of the sharing economy?



*6% of Respondents said there are no benefits of the sharing economy, and 25% said "Don't know"



The sharing economy is an opportunity for cheaper goods and services

In your opinion, what are the two primary benefits of the sharing economy?	Male	Female	18–34	35+	SB	MB	LE	Office	Remote
It makes goods and services cheaper	22	28	36	22	28	23	25	25	30
It gives me more choices	26	22	27	24	20	23	29	26	22
It allows for greater flexibility	25	22	20	24	17	26	24	24	28
It allows me to borrow instead of own goods and services	15	12	14	14	13	15	14	15	14
It encourages entrepreneurship and small businesses	14	15	19	13	8	17	15	15	20
It is easier to assess quality and value of what I am paying for	8	11	8	10	9	11	8	10	10
It is more likely to be cutting edge and innovative	11	6	10	9	9	10	8	8	12



Unlike the majority of global employees, UK employees aren't sold on the sharing economy

German employees are least likely to participate, with 33%, and South African employees most likely (76%)



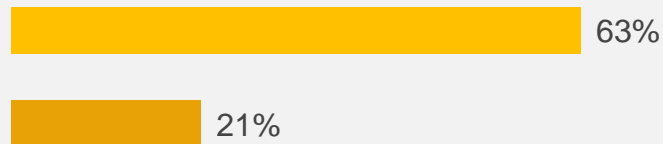
Unlike the majority of global employees, UK employees aren't sold on the sharing economy

Do you plan on participating in the sharing economy in 2017?

UK



Global



Participate
Won't Participate

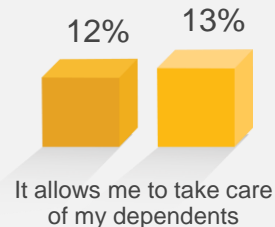
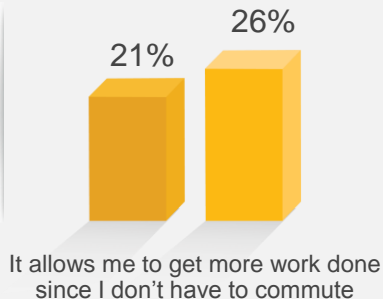
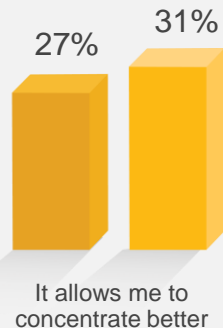
*25% and 16% of Respondents said "Don't know"



Non-Millennials appreciate the productivity and quality of life benefits to flexible work opportunities

In your opinion, what are the two primary benefits of being able to choose whether you work in an office or elsewhere?

Productivity Benefits



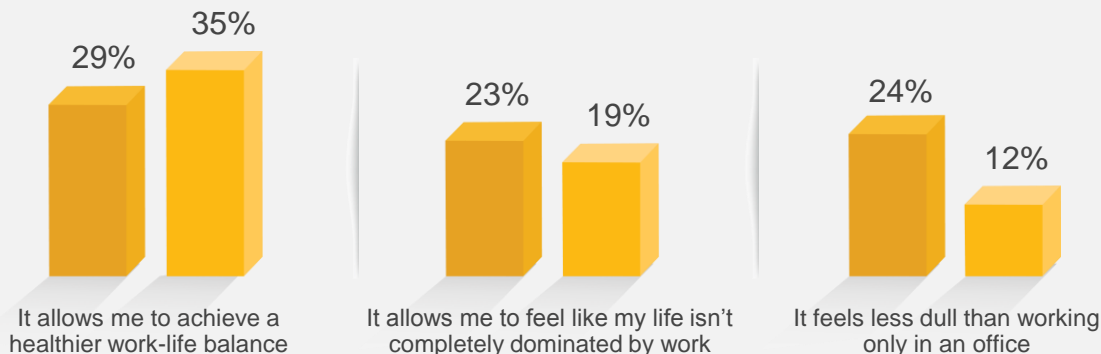
Millennials
Non-Millennials



Non-Millennials appreciate the productivity and quality of life benefits to flexible work opportunities

In your opinion, what are the two primary benefits of being able to choose whether you work in an office or elsewhere?

Quality of Life Benefits



Millennials
Non-Millennials



Methodology



Methodology

Penn Schoen Berland (PSB) conducted 400 online interviews in the United Kingdom between April 27–May 7, 2016 among United Kingdom employees. The report primarily analyzes the following groups:

Audience	Definition	N Size	MoE (%)
UK Employees	UK adults who work more than 35 hours a week and work in one of seven target industries: Education, Government, Financial Services, Healthcare, Manufacturing, Media & Entertainment, and Retail	400	±4.90
Men	Male UK Employees	229	±6.48
Women	Female UK Employees	171	±7.49
Millennials (18–34)	UK Employees Age 18–34	85	±10.63
Non-Millennials (35+)	UK Employees Age 35+	315	±5.52
Small Business	UK Employees who work for a company or organization with less than 100 people	91	±10.27
Medium Business	UK Employees who work for a company or organization with between 100 and 5,000 people	184	±7.22
Large Enterprise	UK Employees who work for a company or organization with more than 5,000 people	125	±8.77
Office Employee	UK Employees who work in an office at least a few times a week	322	±5.46
Remote Working Employee	UK Employees who work either at home or in a public place at least a few times a week	128	±8.66



Audience Summary: Millennials (18–34) vs. 35+

Key Difference	Data
Tech impacts job retention and selection	30% of Millennials (18–34) would be likely to quit a job with substandard tech (vs. 18% of 35+), and 70% say that a new job's available technology impacts on their decision whether or not to take the job (vs 51% of 35+)
Collaboration is on the rise	Millennials (18–34) are most likely to recognize that collaboration in the workplace is growing — 69% say that the workspace is more collaborative than it was (vs. 58% of 35+)
Face to face communication is on the decline	More British millennials (18–34) than employees over 35 years old agree that remote teams and better communications technology will make face to face communications obsolete (44% vs. 35% of 35+)
Work devices aren't just for work	British Millennials use their work devices to visit social media sites (38%), online shop/pay bills (37%), talk about colleagues (13%) and download or stream music/videos (11%)
Robots are coming for their jobs	More British Millennials say they're most worried that robots will take their job (28%) than British non-Millennials (20%)
Workplaces of the future will be "smart"	Most British Millennials (56%) expect that they'll be working in a "smart" workplace that uses IoT in the next five years, vs. 38% of 35+



