



United Kingdom

It's true, the workplace is changing. "Office" is no longer only at an employer's site. Work is no longer solely done in a designated location (it is carried out at home, at external locations, even public areas). All this means that mobile technologies are increasingly catching on—but workers in the UK still hold onto their traditional workplace notions of "office" as a specific location.

Interestingly, companies in the UK are some of the quickest globally to adopt open floor plans that enable employees to collaborate without office or cubicle barriers: a trend that capitalizes on physical—not virtual—presence. And personal interactions are preferred over remote options.

In line with their traditional mindset, most UK workers still use and prefer desktops over other devices; having the latest technology is less important to them. However, workers don't shy away from mobile technologies for personal use - laptops, tablets and smartphones are prevalent outside of work. These types of technologies can be leveraged when employers do call for UK workers to be accessible during their personal time.



One Size Doesn't Fit All



In the office, the desktop rules - nearly 3-in-4 UK workers use desktops for work and prefer them. And while the desktop is far from sleek, it performs, and that's what's important for work and presumably a big driver of preference. In fact, performance trumps battery life at a rate of 10 to 1 in terms of importance!

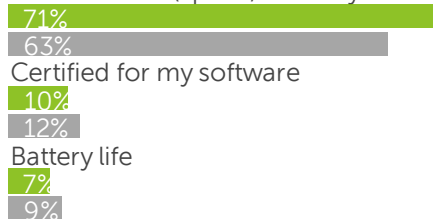
What isn't used frequently? Tablets, 2-in-1s, and touchscreen interfaces. These haven't made it into UK workers' current use practices, yet, but there is clear evidence of growing interest as 17% would prefer to use a tablet at work.

UK workers show some of the lowest averages for multiple device use compared to all countries globally. 46% of UK workers indicate they only use the desktop for work and no other device.

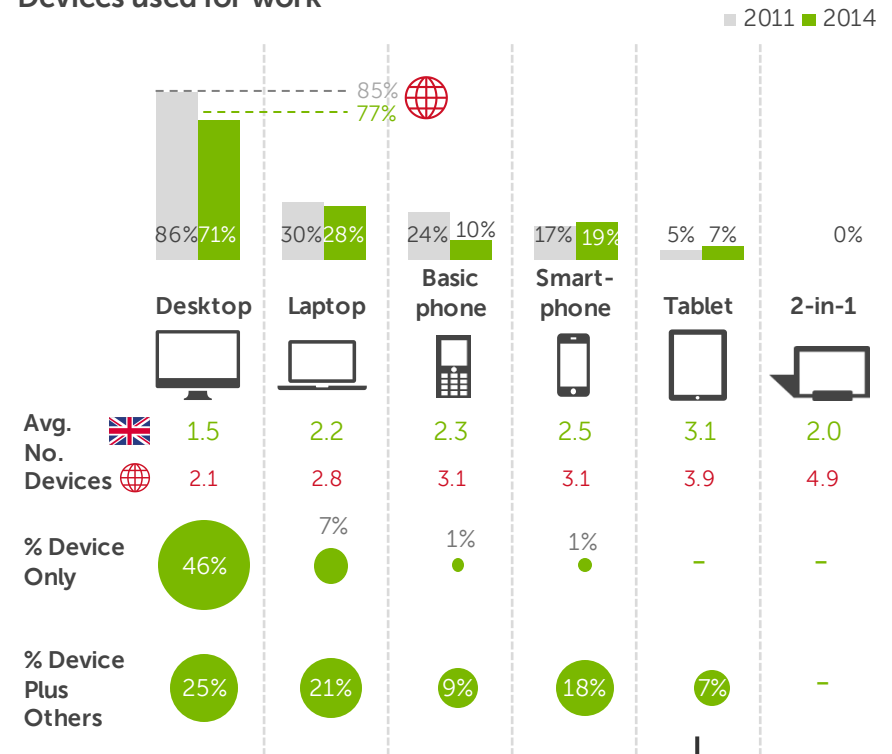
And while desktops are the go-to devices for work, during their personal time UK workers will be at their laptops or checking their smartphones—not sitting in front of their home desktop computer. This suggests that during personal time, UK workers value mobility and flexibility, and that may just spill over into work-life down the road.

Most important aspect of work device

Performance (speed, memory and storage to download and access files)



Devices used for work*



Avg. No. Devices

% Device Only

% Device Plus Others

17%

would prefer to use tablets for work
Compared to:
16% Emerging
14% Developed

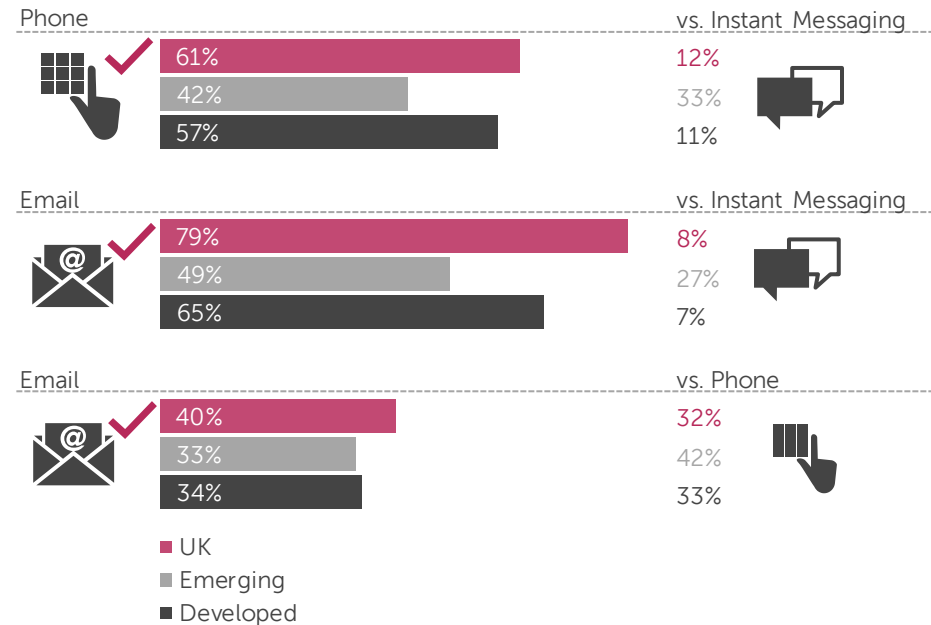
The Office is King, but it's a Jungle Too

During office hours, you'll most likely find UK workers congregating at their employers' offices. In fact, almost all spend at least some time physically present in the office, and about two-thirds spend at least 75% of their time there (compared to just over half globally). These numbers are indicative of a working style that values personal exchange.

What makes UK workers come into the office? Perhaps there are a number of factors, but one very important motivation is that it promotes high performance. Sixty-five percent of workers say they do their best work in the office (compared to only 14% who say they do their best work at home).

What communication channel doesn't promote productivity? Instant messaging. UK workers feel that picking up the phone or sending an email is much more helpful than instant messaging. And in-person meetings are preferred to online meetings (6-to-1 in the UK vs. 3-to-1 globally). The need for personal connection and dialogue that goes beyond short quips is still strongly valued in today's workplace.

UK preferred communication methods



Work Life + Personal Life = Life

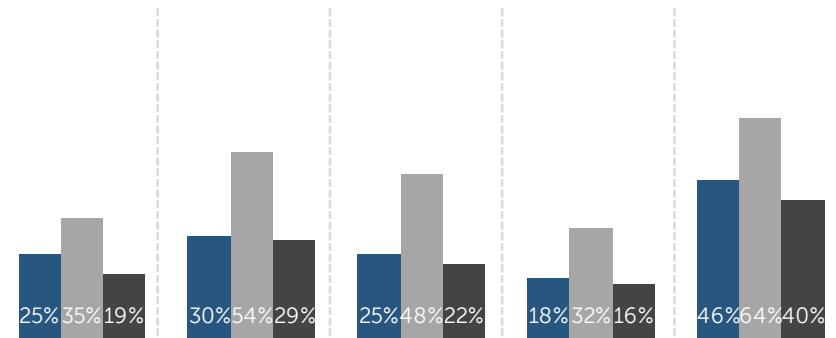


The trend is set: work and personal life are no longer clearly demarcated. Employees are working during their personal time and doing personal tasks while at work, thus creating their own flexibility to meet personal and professional goals. A full 46% are doing personal tasks while at work, and 25-30% are taking work home or using their personal devices for work.

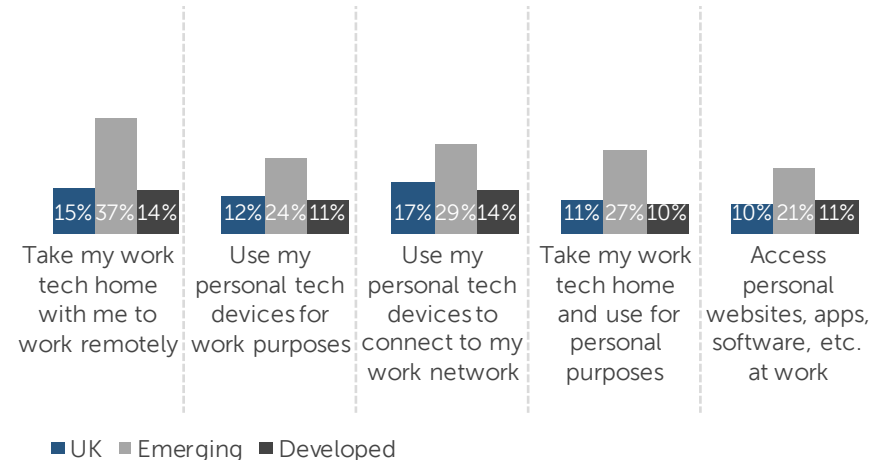
But perhaps this isn't in the cards for the long-term. UK workers don't expect to do these things in the future at nearly the same rate as today.

How does today's trend impact worker mobility? A great deal—as work is now location-agnostic. One-third of UK workers say they spend some of their working hours from home (vs. one-half globally). Work intrudes on personal time, but to a smaller extent in the UK than elsewhere with 26% taking work calls (vs. 52% globally) and 41% checking work email (62% globally) after hours.

Do currently



Expect to do in the future



The Productivity Debate: Office Workers vs. Remote Workers



In general, the sentiment does not lean in favor of home-workers, which suggests that the office is here to stay. A full three-quarters of UK workers believes that the office will continue to exist at least in their lifetime (vs. 69% globally).

Home-working tends to be viewed as a perk in the UK (8-in-10 vs. 7-in-10 globally), not a basic expectation. For employers, this suggests that offering flexibility to workers can be used to reward, retain, and attract talent—as long as there is a favorable balance to promote productivity.



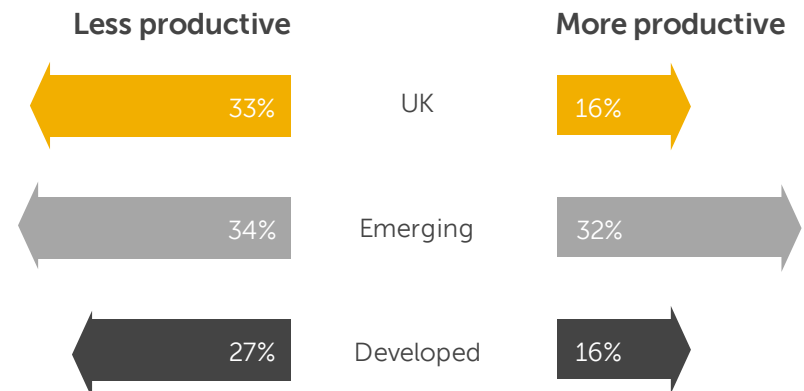
8-in-ten

view it as an **extra benefit** (vs. 7-in-ten globally)



The opinions of employees regarding those who work from home are still very traditional. Many employees feel that people working from home are less productive than those who work in the office by 2-to-1.

Overall, UK employees believe people working at home are...



The Secret to Happy Employees? Technology



Workers in the UK want technology to work for them. If it doesn't meet their standards, there's a 4-in-10 chance that they will look for other employment opportunities, presumably where technology better suits their needs. While that isn't a staggering number, it still suggests that technology has an impact on worker retention. And UK workers do factor technology into their decisions to take new work opportunities (at least half say it influences their decision in some way).

It isn't just about having the latest and greatest technology at their disposal; only 4-in-10 actually care. What these findings imply is that workers want technology to work for them, to enhance their lives and to make them productive. It's matching the tool to the need that makes the difference.

UK employees say...

It is important to have the latest and greatest technology at work



They would **not** likely quit job if the technology didn't meet with standards



The technology available would **not** influence decision to take a new position



- UK
- Emerging
- Developed

The Future of Tech in the Workplace is Bright, but Not Fully Automated

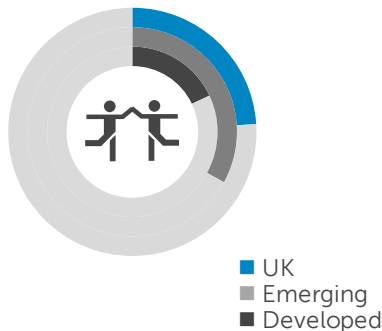


Most UK workers share the prediction that technology will continue the trend toward mobile—the key is for this trend in technology to make employees' work lives easier and more collaborative.

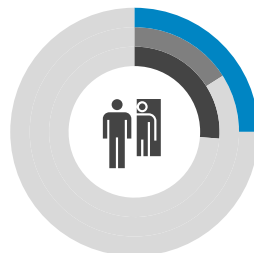
Still, workers recognize that technology's impact is limited. Nearly 3-in-4 in the UK say that there are some things that are just better done by people. This widespread sentiment is much more prominent in the UK than in other developed markets (65% think this is the case in developed markets).

Does technology connect people or dissociate them? The jury is out on this one—UK workers are split in their opinion. One-quarter says technology connects, another one-quarter says it separates. The reality, possibly, is a bit of both.

Technology brings people together

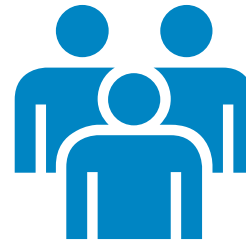


Technology separates people



73%

UK employees think technology is fine but that **there are some things that are just better done by people**



45% Emerging
65% Developed