

THE RISE OF THE HYBRID WORKPLACE

A Global Survey of Executives, Employee Experience Experts,
and Knowledge Workers

October
2020



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Introduction

This paper reviews research which sought to understand the impact COVID-19 has had on the work environment, the current state of remote workers, their concerns about returning to the office, and the role technology can play in supporting businesses in their transformation to the hybrid workplace.

Executives, knowledge workers, and those in key roles responsible for employee environments were asked to participate in a global research survey focusing on the impact COVID-19 has had on employees and the business. A total of 1569 qualified participants completed the global primary research survey.

- **The survey focused on identifying pre- and post- COVID-19 trends:**
 - Days working from home
 - Use of collaboration tools
 - Video-meeting challenges
- **The research also focused on the new office environment:**
 - Concerns workers had around returning to the office
 - Changes that would make employees more comfortable.
 - Types of technologies that workers perceive will increase their safety in the office consistency with periods/no periods
 - Key technologies and capabilities to help companies transition to the hybrid work environment.

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Executive Summary

This research finds that moving forward, more than half of all employees will work 8 or more days each month from home, driving the realization that 98% of meetings now have at least one employee attending remotely from home. This work model change creates dependence on collaboration technology. Yet nearly every research participant cited frustrations with video meetings and the tools available. Executives and employees desire dedicated collaboration devices and digital meeting assistant technology to make remote working more productive.

Nearly every employee is worried about returning to work, with concerns about touching shared office devices, social distancing, cleanliness, and more. The good news is almost every company surveyed is planning to make sweeping changes to make employees safer in their work environment. Participants indicate that collaboration technology can play a role in making the workplace safer and less frustrating by enabling employees to use touchless technology, voice-controlled assistants, social distancing indicators, and digital signage.

Companies must now support a hybrid work environment for in-office and remote employees with work flexibility, increased cleanliness, and the right collaboration technology. They must also prepare for a safe return to the office. As a result of the hybrid model, companies are considering downsizing to smaller offices and are looking at strategies to support workers who may only be in the office a few days per week. This research indicates that tracking metrics for actual facility, desk, and meeting room use and cleaning schedules is something less than half of companies can do today. Collaboration technology that leverages AI, environmental sensors, and advanced analytics can create intelligent workplaces that support employees in every space, increases workplace safety, and provide insights to optimize costs and office use.

Key Findings

- **Working from Home the New Normal**
 - 58% will work 8 or more days each month from home (Post-COVID)
 - 98% of meetings will include participants joining from home (post-COVID)
 - 98% share frustrations with video meetings when working from home
- **Employees Uncomfortable Returning to the Office**
 - 97% of employees want changes to make them feel safer at work
 - 99% of companies are planning sweeping changes to the workplace as a result of COVID-19
 - 94% of companies say technology would benefit them by providing a safer work environment
- **Hybrid Work Environment**
 - 77% of larger organizations will increase work flexibility while 53% will shrink office sizes
 - 89% of employees cite frustrations with in-office experiences
 - 96% indicate they need intelligent workplace technology to improve work environments

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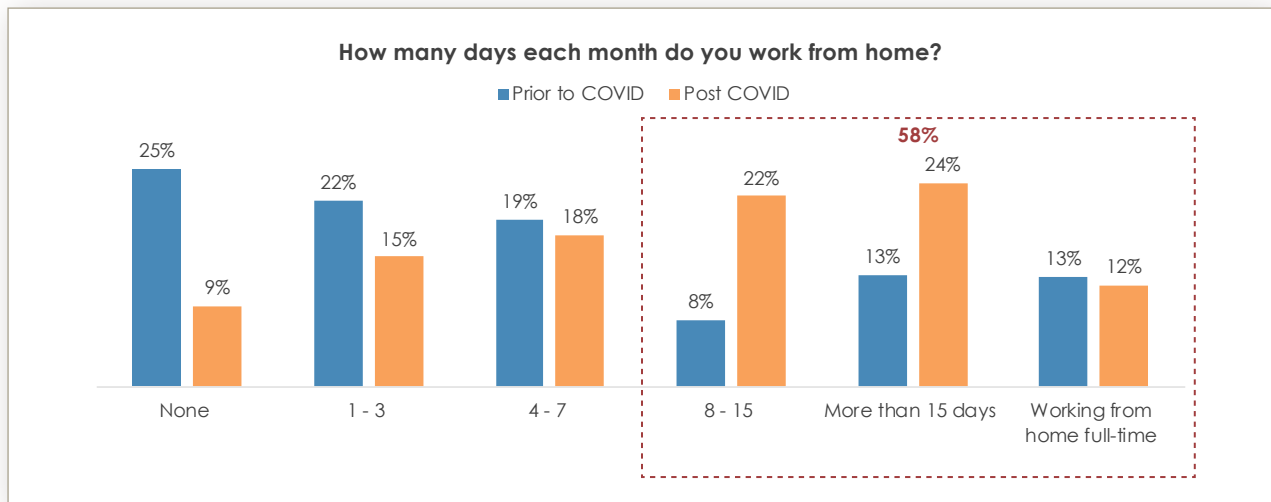


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Detailed Findings

Employees Working from Home is the New Normal

COVID-19's current effects on the workplace are clear as most knowledge workers were asked to work from home a substantial percentage of the time. However, this research shows that as the pandemic wanes, employees will continue to work increasingly from home, with 58% indicating they will be working from home 8 days or more each month. Additional analysis reveals this change is similar for all seniority levels from front line workers to executives. This shift represents a significant change in work approach and culture as only 9% expect to return to working from the office 100% of the time—which means almost every organization is going to need plans for supporting both in-office and remote workers.



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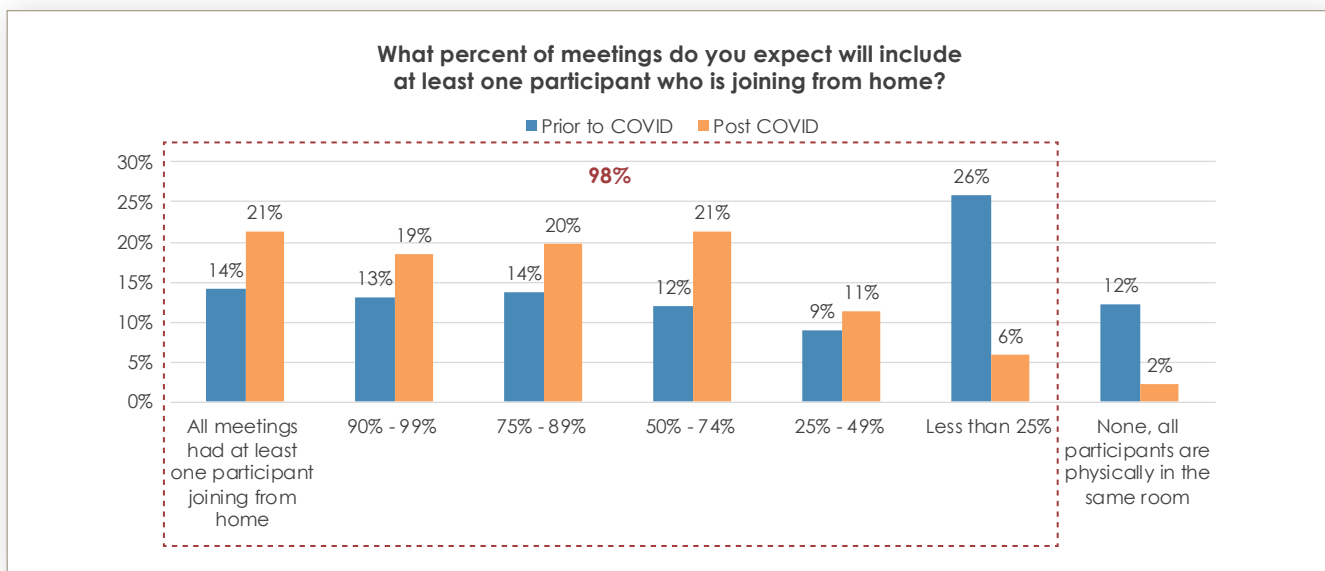
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Nearly All Meetings Will Include Home Participants

The significant increase in employees working from home delivers the finding that 98% of all meetings are now expected to include home participants. Perhaps another way to look at it is that only 2% of participants surveyed believe that meetings will have all the participants physically in the same room. This finding underscores the increased reliance on video meeting solutions for both in-office employees as well as those joining from home.



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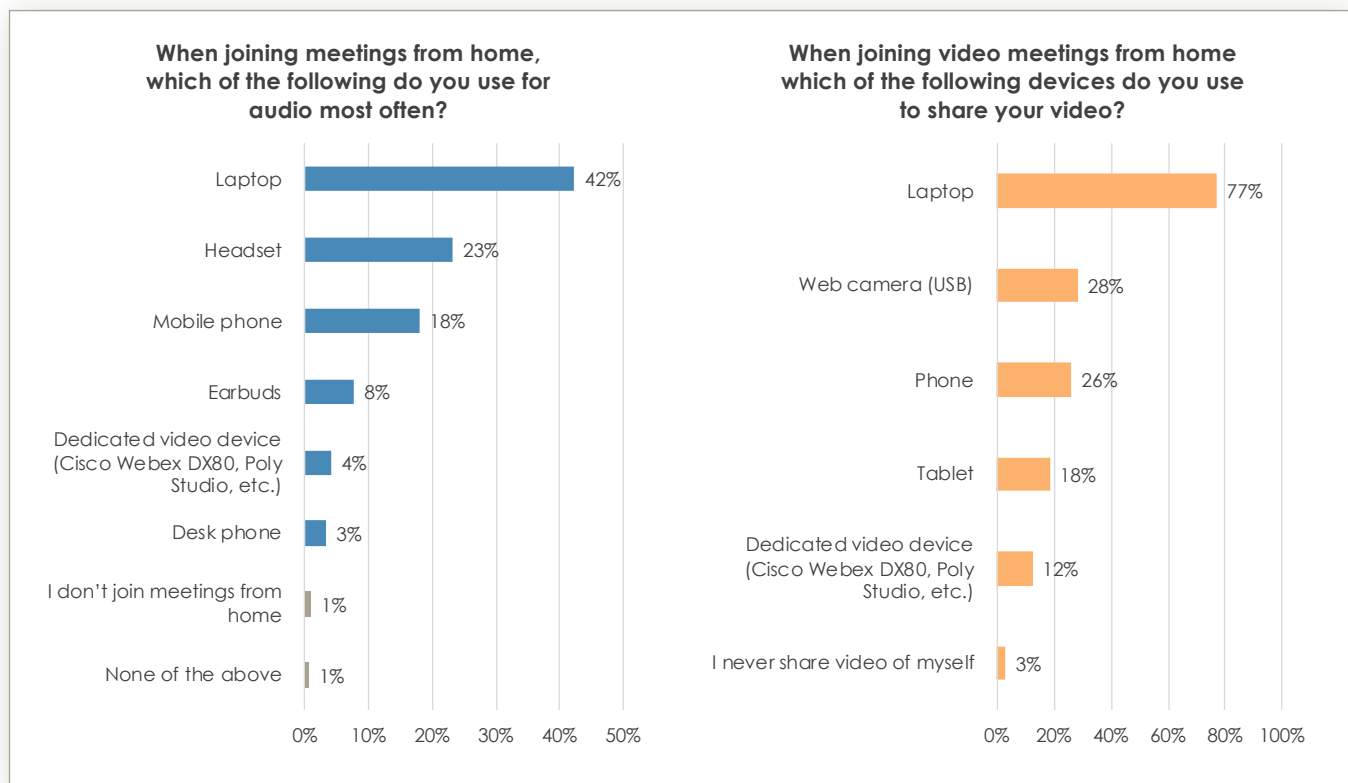
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Laptops Relied On By Home Meeting Attendees

This research finds that most home meeting attendees use a laptop for both audio (42%) and video (77%). Headsets are only used by 23% of meeting attendees and 18% use a phone to join a meeting from home. USB cameras (28%) are the second most common way people share video, closely followed by the phone (26%). This demonstrates that most companies are using traditional equipment for remote employees.



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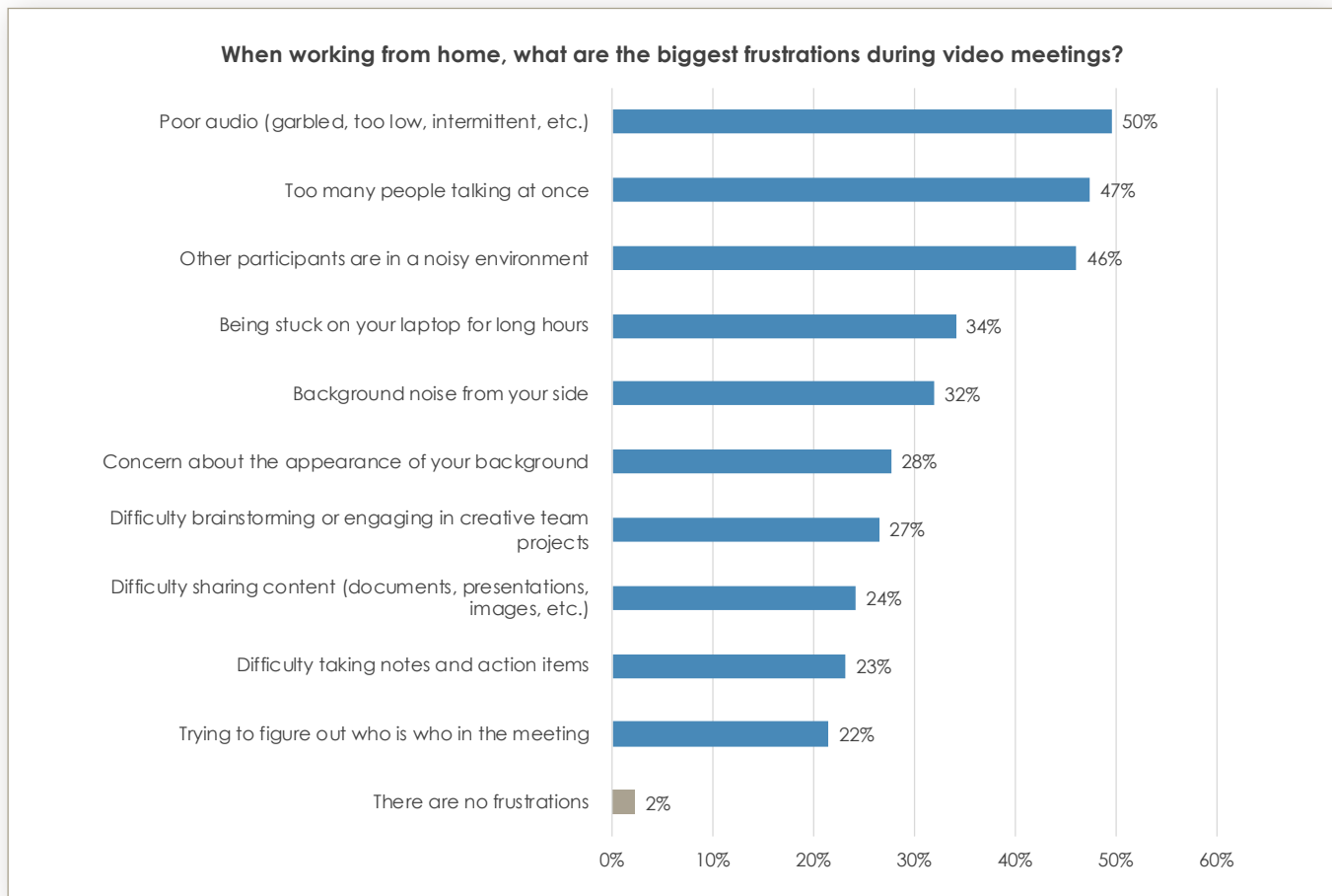
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Biggest Frustrations During Video Meetings

The research further reveals that 98% of home-based meeting attendees experience frustrations during video meetings. The top three issues center around being able to hear clearly: 50% cite generally poor audio, 47% are frustrated by too many people talking at once, and 46% complained of background noise from fellow participant's environments. This is clearly a red flag with so many people now attending meetings from home. The inability to hear other participants clearly often reduces the ability to focus and overall meeting effectiveness. Previously it was found most use a laptop to connect to meetings but here 34% cite as an issue that they are tied to it for long hours. These factors clearly indicate existing traditional equipment is creating frustration and better solutions are needed.



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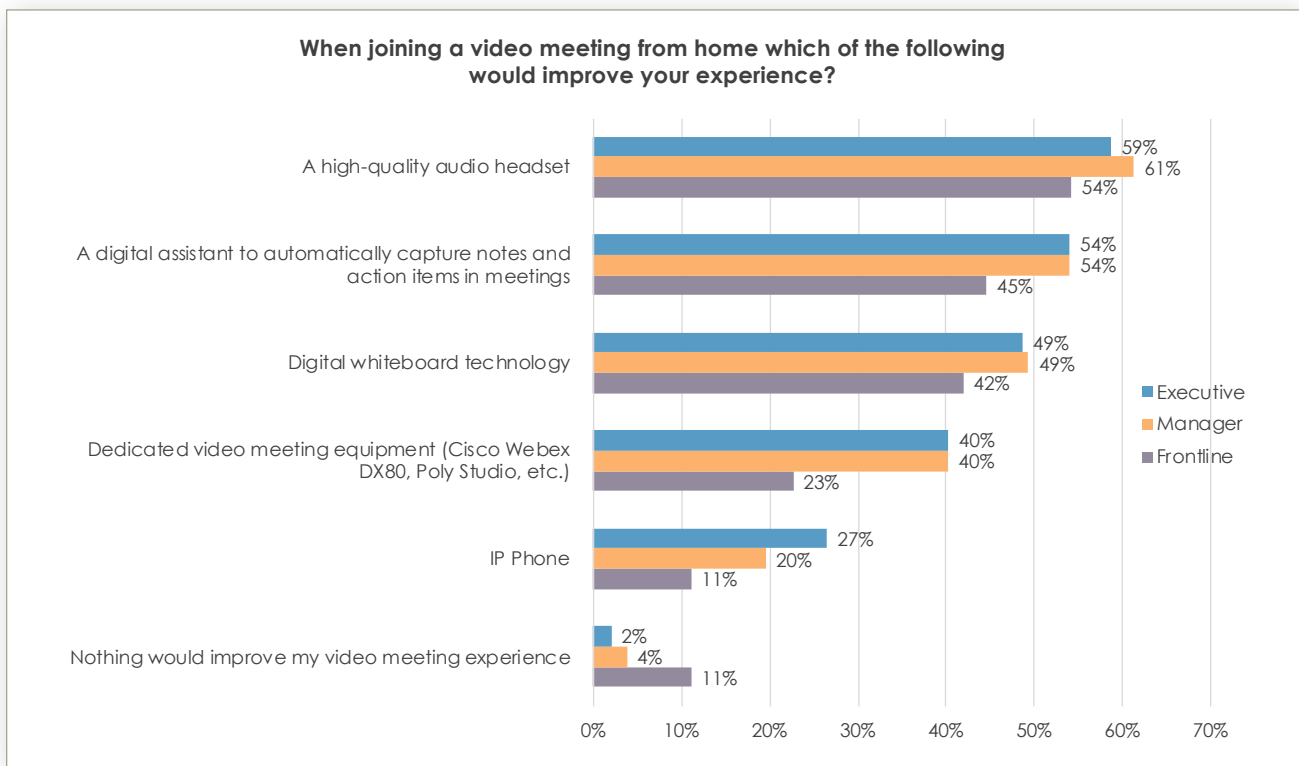
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Dedicated Meeting Technology Wanted

The research then asked participants what would improve their home meeting experience, and a high-quality headset topped the list with more than half of all participants consistently requesting it. The second most requested capability was a digital meeting assistant that could capture notes and action items in meetings. Digital whiteboards also receive a larger number of requests from front line to executive roles. Dedicated meeting equipment was desired by those in executive and manager roles far more than front-line workers, perhaps because front-line employees do not seem aware those solutions exist. These top 4 improvements center around a desire for a better audio and video experience as well as a desire for functionality that would make working from home and attending meetings more productive. Providing remote workers with collaboration devices should be a priority to ensure meeting productivity and reduce frustration and fatigue.



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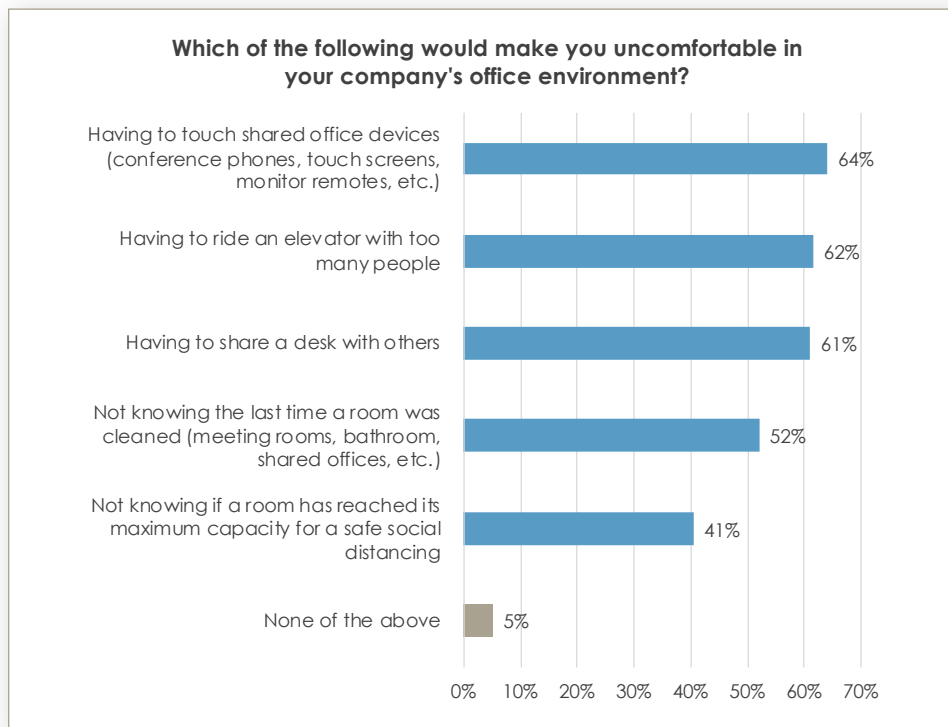
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Employees Fearful About Returning to the Office

While the research reveals a shift to working more often from home, employees will still need to periodically return to the office and 95% of workers are uncomfortable about that return due to fears of contracting COVID-19. Leading the concerns at 64% is not wanting to touch shared office devices, closely followed by concerns over riding in a crowded elevator (62%) and sharing a desk (61%). Not knowing how recently a room was cleaned (52%) and concerns about social distancing (41%) completes the top 5. Businesses need to take the necessary steps to ensure that their return to office plan eases these concerns and includes frequent communication about cleanliness and potential unsafe situations.

The way we work has forever changed. It's time to reimagine and embrace our new normal – a blend of in-office and remote workers in every meeting. Discover how collaboration software and intelligent workplace solutions powered by collaboration devices can support the hybrid workplace and enable teams to collaborate seamlessly in any space—together with the analytics needed to continually optimize the workplace.

[Hybrid Workplace Solutions from Cisco Webex](#)



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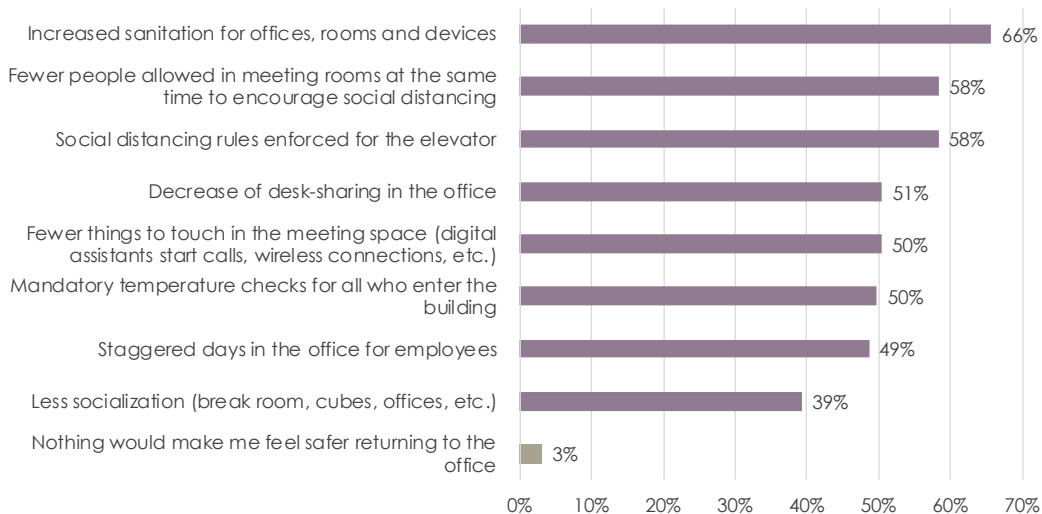


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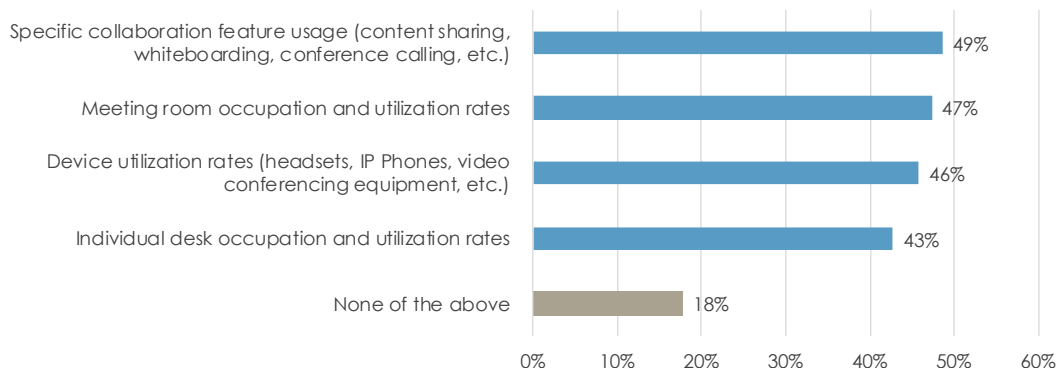
Employees Asking for Work Environment Changes to Feel Safe

Based on these concerns, a staggering 97% of employees want their employers to make changes to increase safety as they return to the office. The top request is increased sanitation (66%) and enforcement of social distancing both in meeting rooms (58%) and elevators (58%). The next four are only separated by 2% and represent nearly half of all participants: less desk sharing, fewer things to touch, mandatory temperature checks, and alternating days in the office. These have direct impact to employers and facilities - not only do office environments need to be thoroughly cleaned on a routine basis, but metrics need to be captured and reported to employees so they know it is clean and they know social distancing is being observed. Yet today, less than half of all companies can measure utilization or report on cleanliness. This indicates a lack of work environment visibility and control which provides a troublesome gap between what employees want and what companies can provide.

Which of the following work environment changes would make you feel safer going back into the office?



Which of the following can you efficiently and accurately track today?



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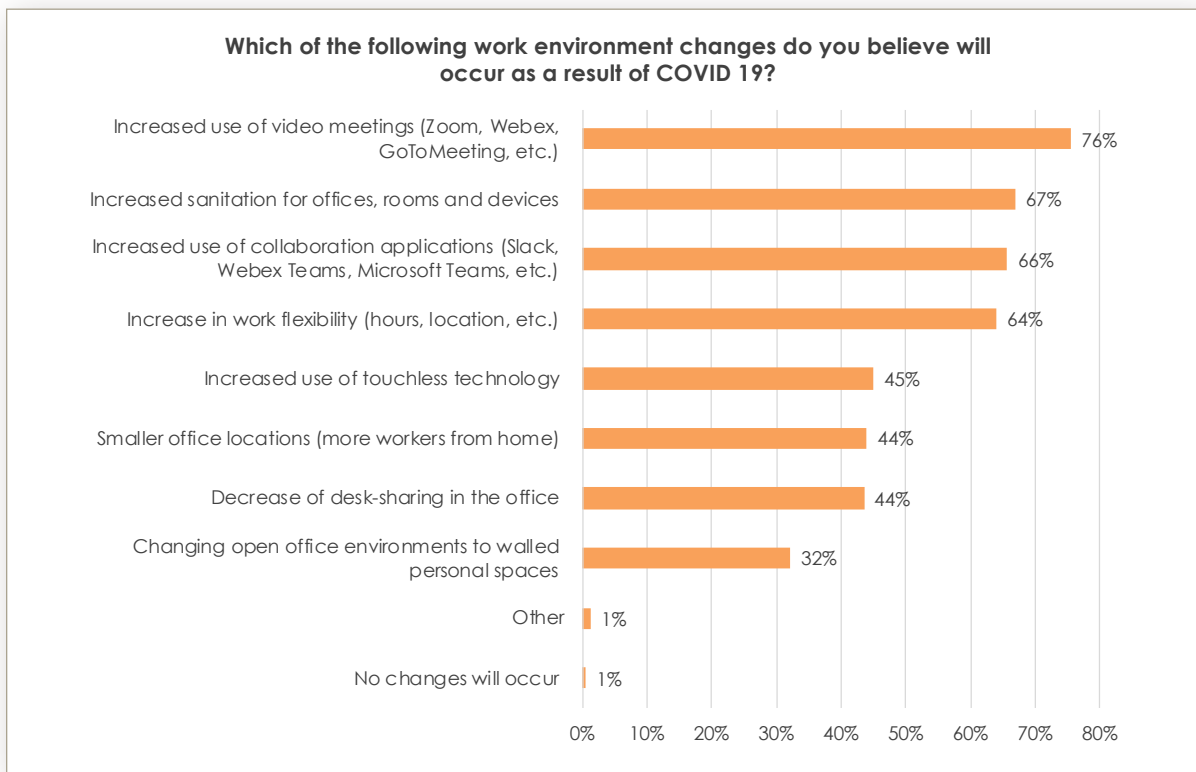
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COVID Changes the Work Environment

Employees were asked what changes they expected will occur as result of COVID-19, and 99% of those surveyed are expecting changes. The top answer at 76% is increased video meetings, followed by increased office cleanliness (67%), and increased collaboration application use (66%). Most employees are expecting more work flexibility (64%) that encourages at-home work and adaptable schedules. Nearly half of the participants want more touchless technology (45%), but also believe the business will downsize offices and decrease desk-sharing (44%).



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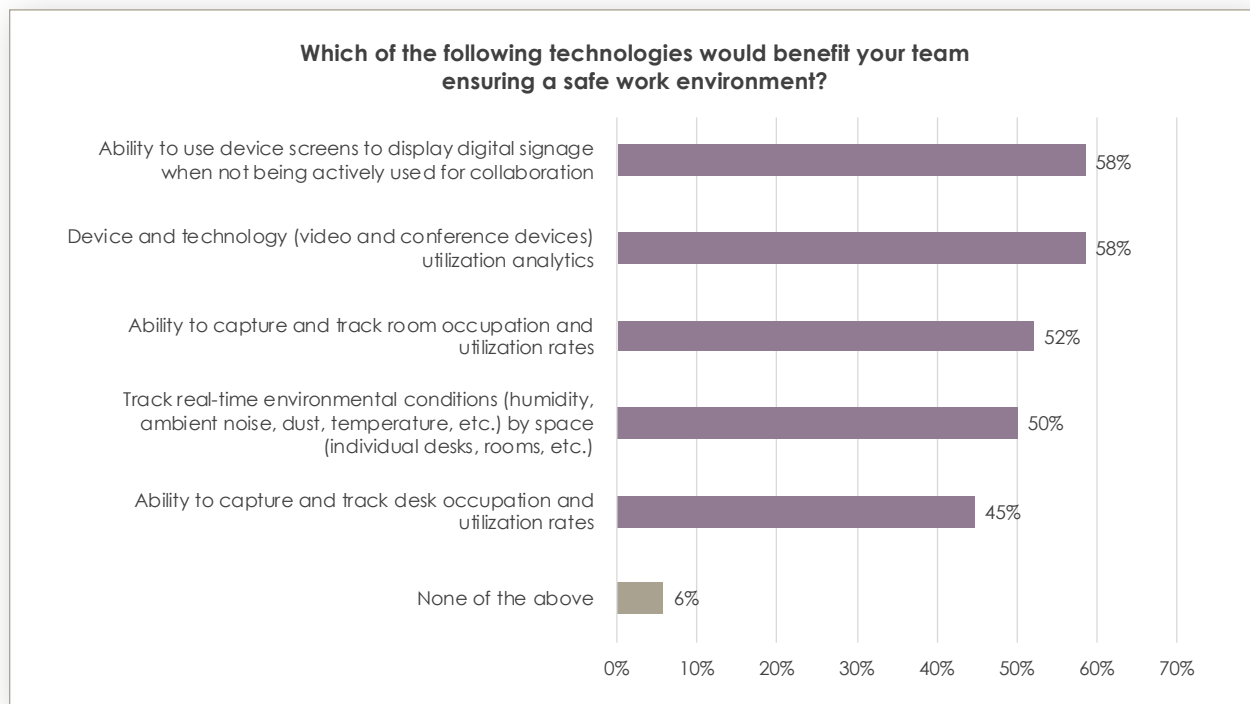
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Technology Can Facilitate Safer Work Environments

Employers and employees agree that technology can play a significant role in making the work environment safer and more comfortable for employees. 58% report they would benefit from screens used in meeting rooms, huddle-spaces, and other locations reporting key information such as cleanliness and meeting room capacity for social distancing. At the same priority (58%), business and employee experience experts want visibility into the utilization of devices and technology to better understand space utilization. The same concept of utilization and occupancy tracking is applied to rooms, at 52%, and desks, at 45%. Half of those surveyed expressed value in knowing real-time environment information such as noise, dust, temperature, etc. This information can help ensure a safe and healthy environment by indicating use and the need for cleaning, and possible unsafe situations. This information closes some of the visibility and control gaps discussed previously in the report. These intelligent workplace capabilities can provide IT and facility managers with the insights they need to make informed decisions about the workplace.



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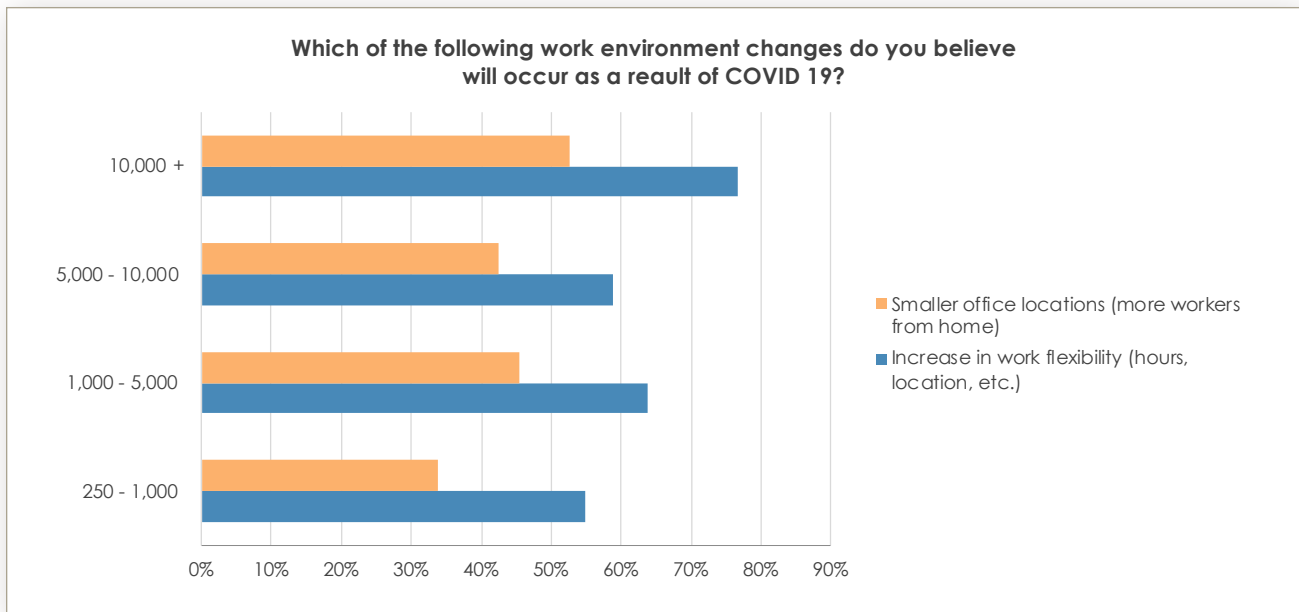
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Companies Increase Worker Flexibility and Shrink Office Size

While businesses need to provide safe work environments, requiring new efforts and solutions, they must also try to mitigate costs and capture savings. The survey results clearly show that one avenue companies are considering is downsizing office locations. Reducing office space is a top focus by larger enterprises, where 53% are already looking at options. Smaller office space is in a symbiotic relationship with the employee’s ability to work from home. While more than half of all companies indicate they are promoting worker flexibility, the large enterprise is leading the way again, with 77% promoting work flexibility. These dramatic shifts require businesses to consider how they can maintain high-quality collaboration when teams aren’t located in the same office and provide the right experiences for employees when they do go to the office—which could be an unfamiliar floor or building.



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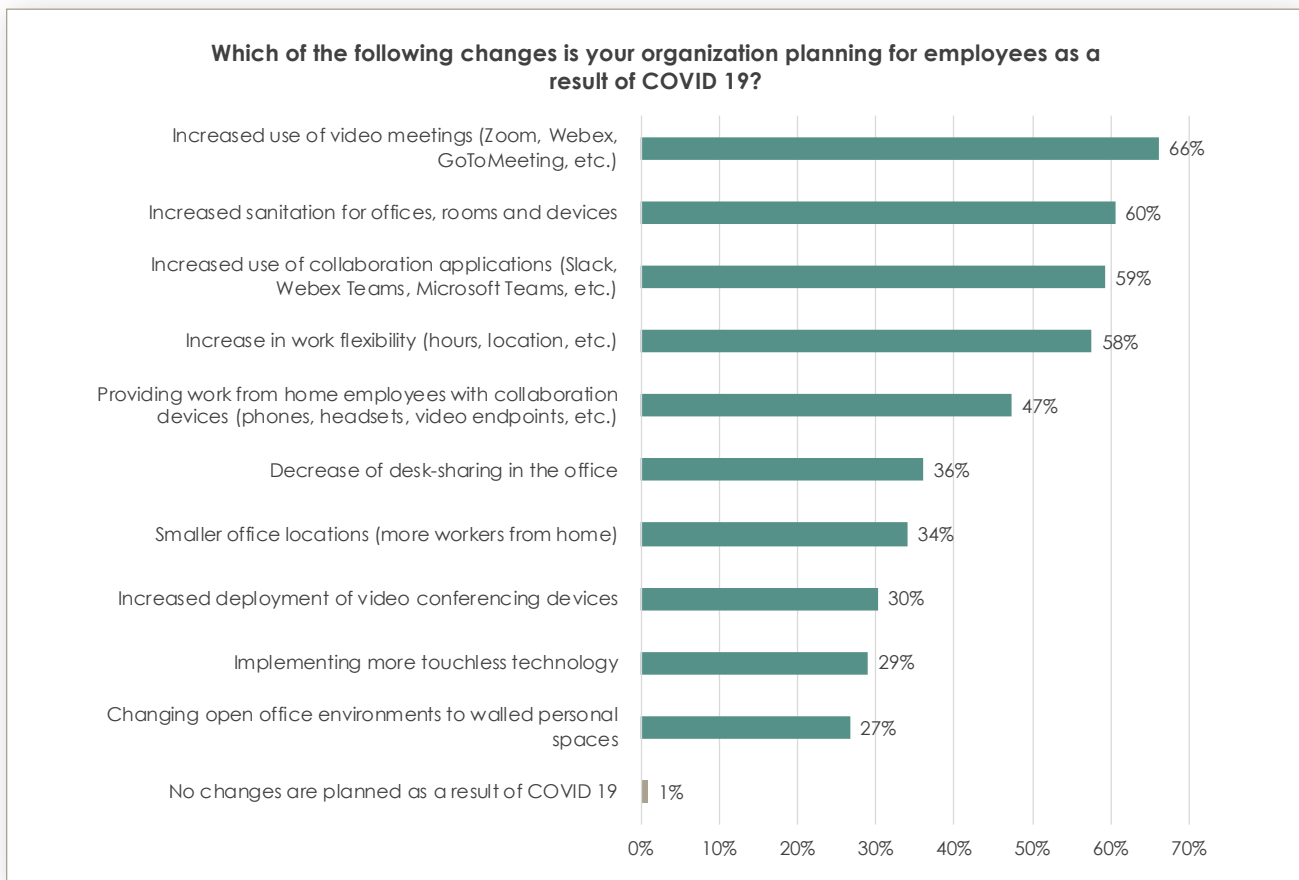
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Companies Planning Pervasive Changes for Employees

Earlier, we reviewed the changes employees want and expect, but later in the research we asked those making the decisions (executives, Facilities, HR, and IT) what their company was planning to provide. Nearly every company surveyed (99%) reported they are making changes to make workers feel safer and better support the large number of employees working from home. Three of the top 5 changes focus on enabling home workers with increased use of video meetings (66%), collaboration applications (59%), and collaboration devices (47%). Increased sanitation is a key focus but at only 60% of companies. And 58% of companies are directly implementing increased worker flexibility. Nearly 1/3 of companies say they will make work environment changes by reducing desk sharing and shrinking the size of office locations. These changes are transforming companies in order to thrive in a hybrid workplace, where employees are just as likely to work from home as they are to work in the office.



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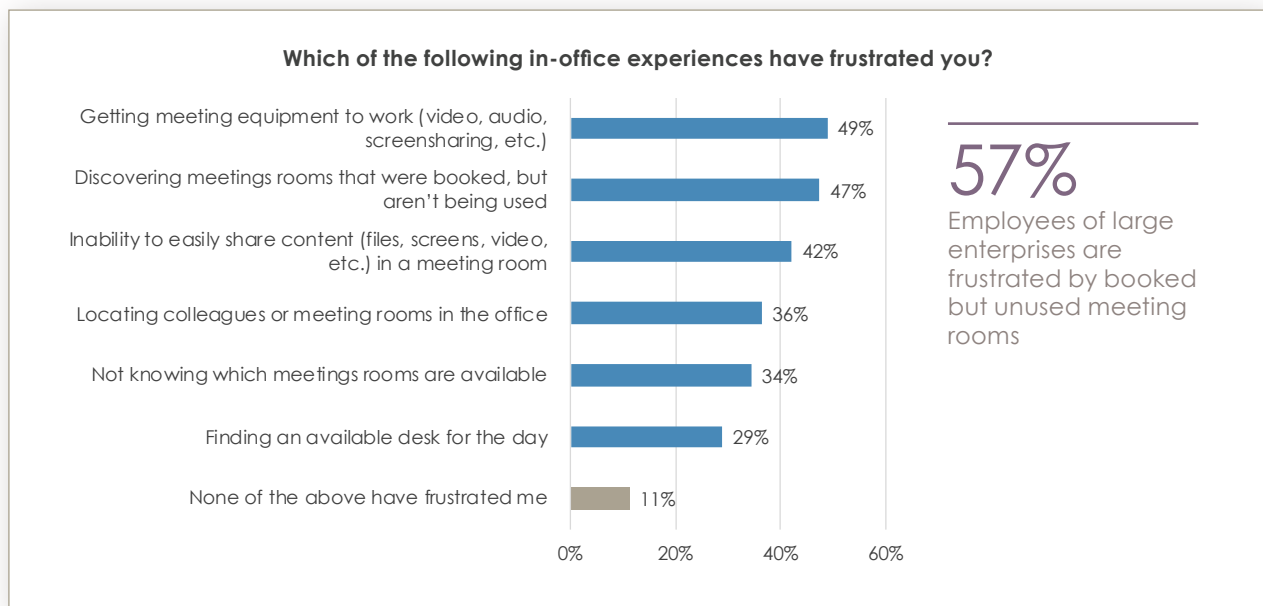
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Employees Already Frustrated

This research also captured current employee in-office challenges, which 88% reported having. Nearly half (49%) of employees have been frustrated trying to get meeting equipment to work and 42% expressed challenges when they want to share content. This is particularly worrisome as this research shows that video meetings are key to the hybrid workplace. 47% were frustrated with meeting rooms being reserved and not used, even more so at large enterprise companies (57%). Frustrations could further mount as these companies enforce social distancing within meeting rooms and downsizing, which could reduce the total number of available rooms. Participants also expressed frustration trying to find colleagues in the office space (36%), and not knowing which meeting rooms were available (34%). Those in charge of workplace transformation should consider these as opportunities for improvement as they plan the hybrid workplace.



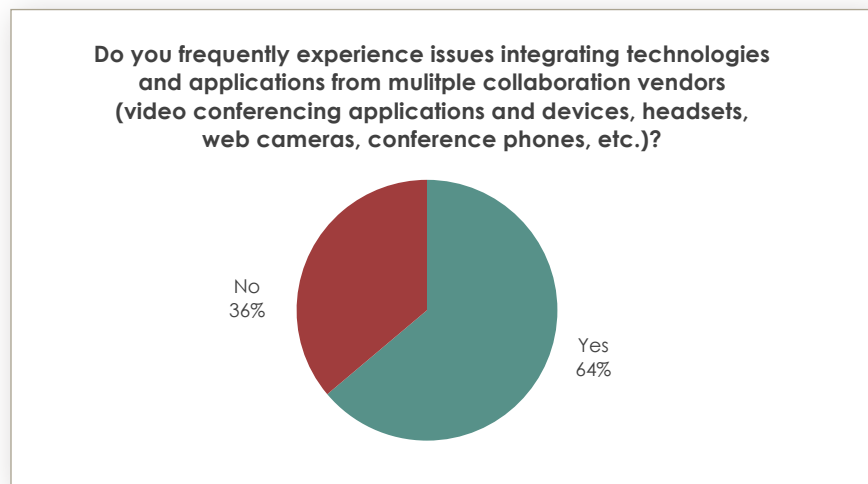
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Employers are also frustrated with the complexity of integrating collaboration technologies from multiple vendors, with 64% citing it as an issue. This report shows COVID-19 is driving business to be even more reliant on technology to enable workers both at home and in the office. Businesses need collaboration solutions to be highly reliable and easy to manage. Companies should consider a strategy that reduces collaboration integration issues and minimizes the resources and effort needed to manage and maintain collaboration solutions. Companies need to ensure current disparate technologies are in fact compatible, replace those that are not, or move to a single technology stack from a reliable vendor.



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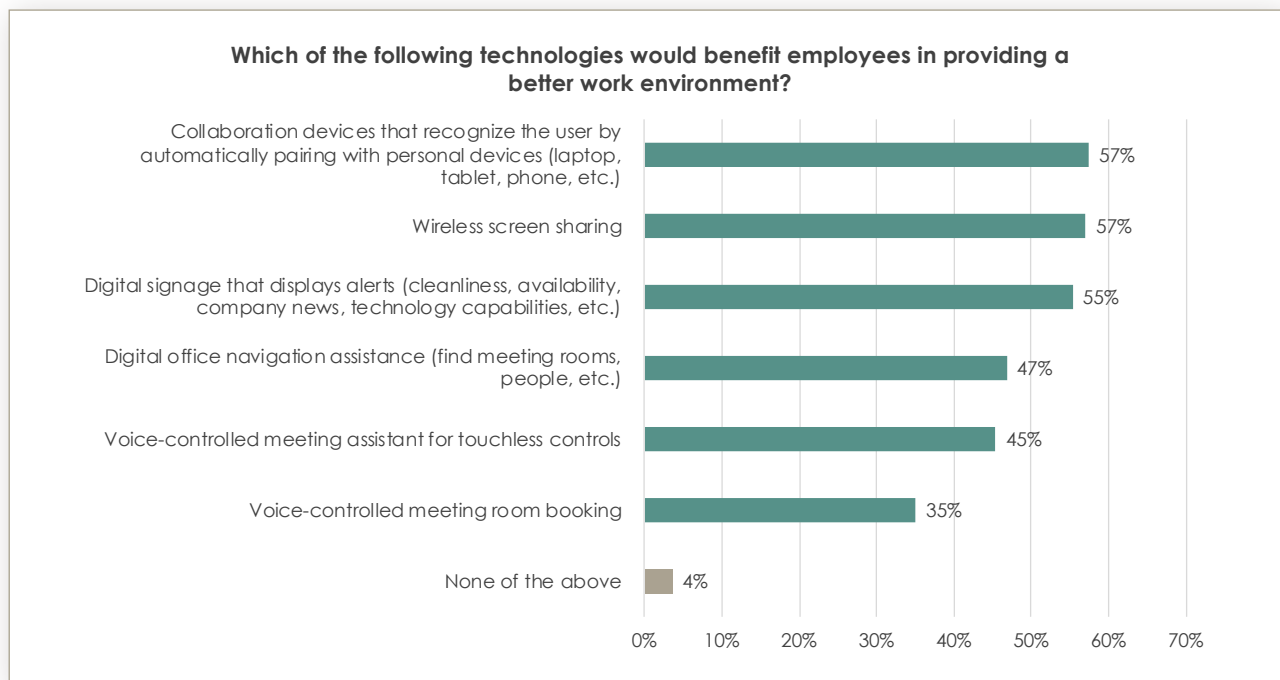
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Technologies to Improve the Work Environment

We asked those responsible for employee productivity (executives, HR, and facilities teams) if technology could provide a better work environment for employees. 96% of them stated key technologies can provide direct employee and business benefits. Tied for the top spot (57%) were smarter collaboration devices that recognize users and automatically pair devices such as conference room collaboration and meeting equipment with tablets and laptops, as well as wireless screen sharing which eliminates hassle and at the same time reduces the need to touch high-use items like cables. More than half (55%) want to use existing screens to share key information with employees, such as room cleaning details, meeting room availability, social distancing metrics, and more. The desire for office navigation (47%) and voice-controlled meeting assistants (45%) rounded out the top 5 technologies. These technologies could provide key underpinnings to build out intelligent workplaces focused not only on employee safety but improved productivity.



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Conclusion

This research validates the widely held perception that most employees will be working a significant portion of their time from home from now on. This represents a key shift for employers and employees alike, requiring businesses to make significant changes as they move to a hybrid workplace. This creates a huge reliance on video meetings and highlights the importance of solving existing challenges such as the inability to clearly hear others and share critical content. At the same time, workers will still return to the office and businesses need to make numerous changes to accommodate these workers—not only do they need to implement safety measures, but they also need to constantly and clearly communicate what they are doing so employees can make informed choices and have control.

The transformation to a hybrid workplace provides myriad opportunities to address both old and new challenges with key collaboration technologies. These technologies can provide reliable solutions for both home-based and in-office workers while also creating intelligent workplaces. Solutions are needed that reduce the need to touch high-use items and that measure and communicate cleanliness, social distancing, room, desk, and collaboration use. Intelligent workplaces also enable the downsizing of offices based on data, making use of the space more efficient through communication and optimization while providing improved employee experiences. The key will be to find the right technologies, solutions, and providers. The technology must work together, be highly reliable, and easy to manage remotely, as the IT team will likely be working from home as well.

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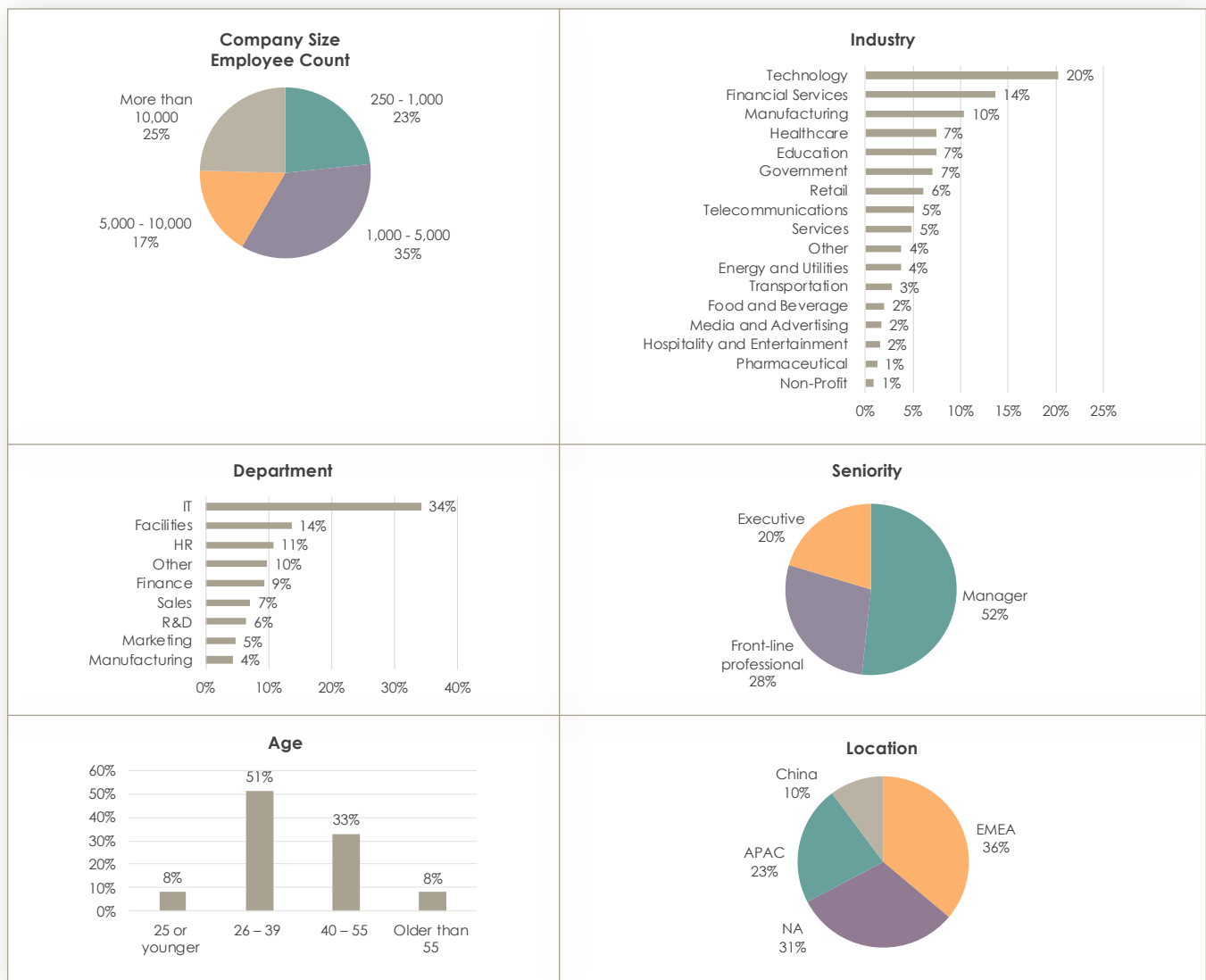
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Survey Methodology

A cross section of executives and numerous IT and business roles at managerial and executive levels were invited to participate in a survey on their work environment concerns and expectations as a result of COVID-19. All participants reported using collaboration technology and leaders said they are directly responsible for employee working environments.

A total of 1569 qualified participants completed the global primary research survey to understand the impact of COVID-19 on the professional work environment. The research also investigated current collaboration solutions used, current challenges and roles technology could play in supporting a new hybrid work environment.

The survey was administered electronically, and participants were offered a token compensation for their participation. Participants were from 5 continents.



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