GUIDE

WORK FROM HOME

EVOLVE IP
WORK ANYWHERE™

A Year of Working From Home:
2021 Remote Work Survey

www.evolveip.net info@evolveip.net 877.459.4347

Survey Overview

Approximately one year ago COVID-19 shut down the world. Millions of lives have been lost, economies have been decimated, and industries permanently altered. Despite the challenges presented by the virus, most businesses have survived – many have even grown. What's kept them going? Employees with the ability to work anywhere, cloud services, and dependable, high- speed connectivity. Each component has been critical to sustaining businesses and providing an accelerated path to financial recovery.

In early February 2021 Evolve IP surveyed 538 individuals via SurveyMonkey about their remote work experience over the last year and post pandemic work expectations. The survey respondents were broken into two groups. The first, 'Business Respondents', consisted of 400+ executives, operations, and IT professionals – those responsible for funding and supporting work from home (WFH) initiatives. The second, 'Employee Respondents' (120+), were asked about how WFH and the related technologies had impacted their jobs.

Respondents were employed at a broad base of businesses with 38% coming from small businesses (less than 100 employees), 50% coming from mid-market & small enterprise firms (100 – 4,999 employees), and 12% responding from large enterprises (5,000+ employees).

Finally, we will look at a way to provide enterprises with the security they need while still enabling employee mobility, BYOD, and helping businesses compete for top talent via remote work in today's increasingly competitive job market.

5 Key Findings

KEY FINDING #1: Working from home makes employees less likely to look for a new job.

44% of employees say working remotely has opened up new job opportunities for them but 60.5% say they are less likely to look for a new job.

→ Only 14% say working from home makes them more likely to look and just 6% think remote work puts their job at risk.

KEY FINDING #2: Over half of executives expect employees will work remotely the majority of the time post-pandemic.

55% of C-Suite executives revealed that they expect employees will work outside of a corporate office the majority of the time even after the pandemic has subsided. This has major ramifications for IT, HR, and operational / real estate planning.

→ It also aligns with employee expectations where 64.5% stated the desire to work from home the majority of the time once the pandemic ends (3+ days/ week).

KEY FINDING #3: Working from home is making employees more productive – much more so than many business leaders think.

75% of employees say they are more effective working at home, averaging a 31% increase in productivity. Business leaders generally agree, but are less convinced about the level of improvement.

→ 34% of C-Suite executives say their employees are more productive at home, 42% aren't sure or estimate no change.

→ Of executives indicating their employees were more effective at home, they estimated a 25.5% increase in productivity – much closer to employee reports.

KEY FINDING #4: Employees are happy with their work from home technology but believe integration (unifying communications, collaboration, virtual desktops etc.), will make them more productive and secure.

77.5% of employees are happy with their company's work from home tech choices. However, employees feel they could be more productive and secure if their solutions were integrated.

→ 66.5% of employees feel they would be more productive and 59% believe their work habits would be more secure. IT professionals agree – 60% and 56.5% respectively.

→ 45% of businesses are planning to integrate their communications and collaboration services in the next 12 months.

KEY FINDING #5: Most businesses aren't planning any major adjustments to salaries or compensation due to work from home.

92.5% of respondents say their businesses aren't making (or planning) any salary / compensation adjustments for remote workers. 5.5% have made or are considering compensation increases or stipends.

→ 13% of employees say working from home has positively increased their compensation. This is likely due to lower work-related expenses such as decreases in commuting, lunches, and work apparel costs.

Survey Deep Dive...

A Global Pandemic. A Seismic Shift

The Past, Present and Future of Remote Work

Today, on average, business respondents noted that 67% of employees are working remotely, an increase of 42 points compared to pre-pandemic levels. Respondents indicated that pre- pandemic, just 25% of their staff worked outside of a corporate office the majority of the time.

As noted previously, post-pandemic, the 'work anywhere' approach will hold. Over half of C-Suite executives (55%) say staff members will work remotely the majority of the time. Additionally, 63% say their employees will be working remotely at least part time.

As for when 'post-pandemic' work in the office will resume, the jury is out. 38.5% of business respondents don't know when the transition will occur, 15.5% indicate that employees will no longer be required to work in the office full time, and 24.5% believe employees will return in the 2nd half of 2021

Survey Deep Dive...

A Global Pandemic. A Seismic Shift

Remote Work Productivity

We asked business respondents and employee respondents independently to estimate whether their productivity has increased or decreased while working from home.

Increased Productivity Working From Home

→ 45.5% of business respondents believe that employees have increased productivity. They estimate the increase to be 25%.

→ 34% of C-Suite executives believe that employees have increased productivity. They estimate the increase to be 25.5%.

→ 75% of employees say they have increased productivity. They estimate the increase to be 31%.

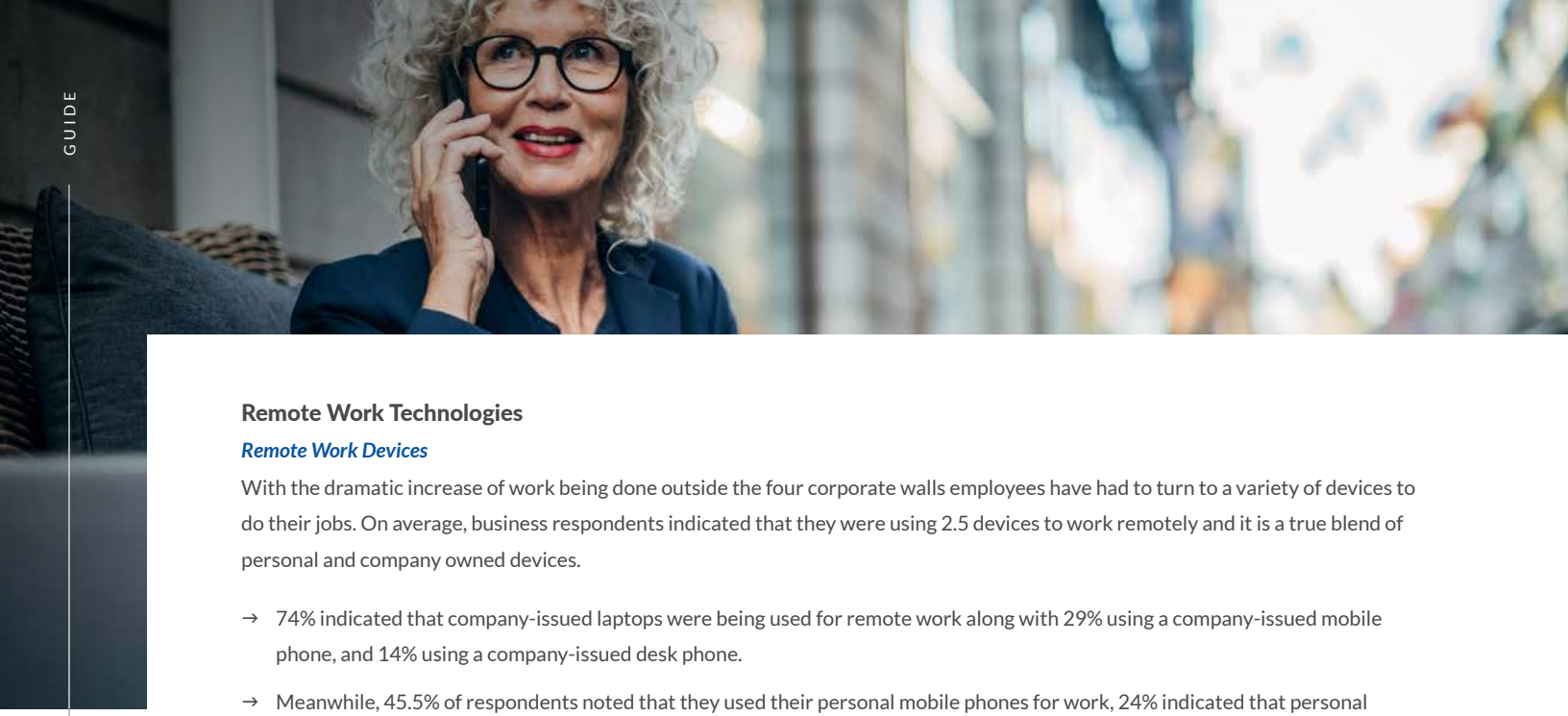
Decreased Productivity Working From Home

→ 16% of business respondents believe that employees decreased productivity. They estimate the decrease to be 13%.

→ 24% of C-Suite executives believe that employees decreased productivity. They estimate the decrease to be 19%.

→ 16.5% of employee respondents say they decreased in productivity. They estimate the decrease to be 19.5%.

Clearly, there is alignment in the percent impact on productivity – both in those who have improved results and those who have decreased in effectiveness. The organizational disconnect is in the ratio of those that do better vs. do worse. A far greater number of employees say they are more productive working from home than executives and other WFH decision makers estimate.



Remote Work Technologies

Remote Work Devices

With the dramatic increase of work being done outside the four corporate walls employees have had to turn to a variety of devices to do their jobs. On average, business respondents indicated that they were using 2.5 devices to work remotely and it is a true blend of personal and company owned devices.

- → 74% indicated that company-issued laptops were being used for remote work along with 29% using a company-issued mobile phone, and 14% using a company-issued desk phone.
- → Meanwhile, 45.5% of respondents noted that they used their personal mobile phones for work, 24% indicated that personal laptops were in use, and 18.5% relied on a personal desktop to do work.

The blending of personal and corporate-issued devices, coupled with the use of home internet, creates significant security and compliance risks for organizations without proper measures. This is one reason approximately half of IT professionals (46%) are evaluating technologies like single sign-on with multifactor authentication in the next 12 months.

Remote Work Technologies

Remote Work Services

As you would expect from the news coverage over the past year, video conferencing and collaboration tools are the dominant services used for remote work. These solutions are currently being deployed by (85%) & (81.5%) of businesses respectively.

What you might not expect however is that 87.5% of all respondents using a collaboration service are also relying on another video conferencing solution.

For example, when we looked at the most cited collaboration tool, Microsoft Teams, businesses were also using the following platforms in conjunction with Teams.

- → 62% using Zoom,
- → 26.5% using GoToMeeting
- → 26% using WebEx
- → 20.5% using Google
- → 19% using Skype for Business.

Respondents indicated this was a concern with 75% of business respondents noting that their employees' work from home experience would be better if they had integrated remote work solutions and 63.5% reporting it would improve productivity even more.

Similarly, with solutions like Microsoft Teams Direct Routing emerging as a defacto way to connect communications and collaboration, there is a surge in integrating collaboration tools and corporate phone systems / communications services.

- → 45% of all respondents plan to evaluate integrating their collaboration and communications solutions in the next 12 months.

Remote Work Technologies

What's Under Evaluation For Deployment

While collaboration and video meetings have dominated the news cycle, businesses have been busy deploying a much wider variety of technologies to support their remote workers.

Spending on remote work technologies increased for 60.5% of our respondent's firms in 2020 and four in ten firms (39%) expect spending to increase on these technologies in 2021.

The result is that today organizations are typically using a combination of five different remote work technologies with collaboration, video conferencing, M365 / O365, and Windows Apps accessed via VPN all being used by over 50% of the surveyed business respondents.

With the proliferation of competing technologies, and the desire from both employees and IT to integrate solutions, the next year will likely bring about changes to many employees WFH tech.

→ 40.5% of business respondents plan to integrate their WFH technologies with 26% planning to consolidate service providers.

The expected future investments and evaluation timelines are:

	Currently Evaluating	3-12 Months	1-2 Years	2-3 Years	3+ Years
Collaboration	22.41%	23.79%	21.38%	9.31%	23.10%
Video Conferencing	22.87%	24.91%	23.89%	9.22%	19.11%
Communications / Voice Phone Systems	25.00%	21.79%	17.63%	13.78%	21.79%
DaaS / Virtual Desktops	13.82%	17.45%	22.55%	10.55%	35.64%
Contact Center	13.16%	18.80%	16.92%	13.16%	37.97%
Identity & Access Management	23.64%	19.27%	19.27%	9.09%	28.73%

Remote Work Diamonds

Gems To Share In Your Next Meeting

Don't Worry Be Happy ...

→ Executives that believe employees are happy with their WFH tech: 60%
→ IT pros that believe employees are happy with their work WFH tech: 73.5%
→ Employees that say they are happy with their WFH tech: 78%

Work Anywhere ...

→ Executives that believe employees prefer working from home: 68%
→ IT pros that believe employees prefer working from home: 60.5%
→ Employees that say they prefer working from home: 77%

Working Location Extremes ...

→ Employees that would like to work from home 5 days per week: 38%
→ Employees that say they would never like to work from home or do so just a couple of days per month: 6%

Conclusion

Businesses did a good job putting together a variety of work from home solutions when the pandemic hit, ensuring their employees could function reasonably well at home. Now, organizations are looking at ways to make these solutions sustainable for the long-term as both executives and employees see the value in a workforce that can be remote the majority of the time.

The most visible results can be seen in the increase in the number of businesses that are implementing remote work technology integration projects today and over the next one to two years. WFH solutions like unifying voice communications via Microsoft Teams direct routing, deploying DaaS, and delivering apps via digital workspaces instead of virtual private networks are high on both IT's and executives radars.

About Evolve IP

Evolve IP is designed to advance today's hybrid workplace. We partner with the world's biggest tech companies to bring together their unified communications, collaboration, voice, virtual desktop, and contact center tools into a single, secure solution, fine-tuned for the hybrid workforce. By integrating these disparate systems from leaders like Microsoft, Cisco, and VMware, and filling in the gaps, we improve both productivity and security, increasing uptime to make the future of work better for everyone.