# ENTERING THE ERA OF HYBRID WORK:
## UNDERSTANDING HOW THE WORKPLACE MUST EVOLVE
A Global Survey of Company Leaders and Knowledge Workers

September
2021

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## Introduction

This paper reviews key findings from two global primary research surveys focused on understanding the experiences of hybrid workers, as well as the tools needed to support the remote and in-office workforce. A total of 2366 participants at all seniority levels are represented in this report.

The research investigates what changes need to be made to the office environment to empower hybrid workers and how to address concerns over safety. The research also focuses on the meeting experience at home and in the office: understanding collaboration needs, challenges, and missing capabilities, as well as what is needed to improve meeting effectiveness, inclusiveness, and productivity.

## Executive Summary

The hybrid worker era is here, with 68% of those surveyed already working from both home and the office. Previous research revealed that 98% of hybrid workers believe that all meetings now will include remote participants. The hybrid work model has been emphatically embraced, with 58% considering leaving current employers if they were required to return to an office full time. But the office needs to adapt, as 9 out of 10 participants expressed safety concerns about returning to the office. Perhaps even more telling is the finding that 97% want changes to make the office safer.

In addition to wanting measures that address safety concerns, nearly all (99%) shared that access to key technologies would make them feel better about returning to the office. According to 97% of hybrid workers, the top challenge to returning to the office is the ability to collaborate with those in and out of the office effectively. Those surveyed said that advanced collaboration solutions are needed, with new key functionality and consistent interfaces whether in the office or at home. As such, companies understand that the hybrid work model is different and have already begun to transform the office by increasing the number of collaborative spaces and video-enabled rooms.

While working from home has brought benefits to the worker and employer, it has also created video meeting fatigue, increased burnout, and growing concerns that those working from home will be treated differently. Video meeting fatigue is likely compounded by remote participants feeling a lack of inclusivity in meetings. Having the right technology could play a significant role in helping mitigate these concerns: 97% agreed that innovative virtual meeting capabilities would make participants feel more included. Additionally, 96% of respondents confirmed that proposed collaboration solution capabilities could reduce burnout, and 88% stated a "meeting-free day" would increase productivity. Many of the capabilities that would improve inclusiveness of meetings also ranked highly in increasing meeting productivity.

Hybrid work is now the norm and that means the traditional ways businesses operate needs to change. Office spaces need to adapt, and collaboration technology needs to advance to drive inclusivity, improve productivity, and enable interactivity regardless of location.

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## Key Findings

- **Hybrid Workers are the Majority but Have Concerns about Remote Work and the Office**
  - 62% are already engaged in the hybrid work model
  - 92% have safety concerns about returning to the office and worry about effectively collaborating
  - 97% cite changes that need to be implemented to improve collaboration for hybrid workers
  - 64% fear work-from-home discrimination
  - 57% have concerns that working from home could leave them excluded from key meetings

- **Combating Video Fatigue While Increasing Meeting Effectiveness is Key**
  - Video meeting fatigue and burnout levels have increased since working from home started
  - 96% agree technology and tactics can help reduce burnout
  - 97% reported key collaboration features would make them feel more included in video meetings
  - 88% believe that meeting-free days would help them be more productive
  - Advanced collaboration features would measurably improve meeting productivity
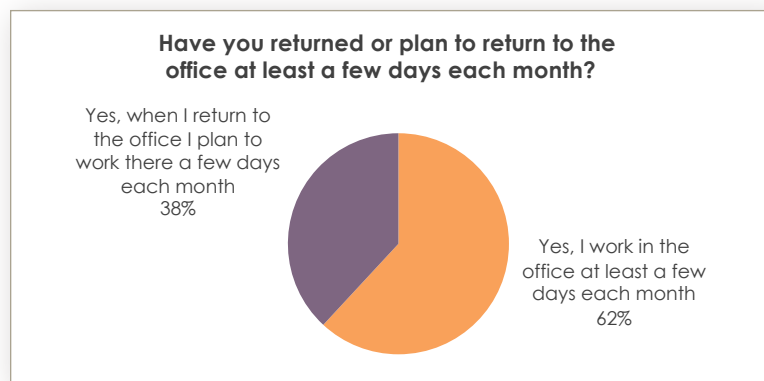
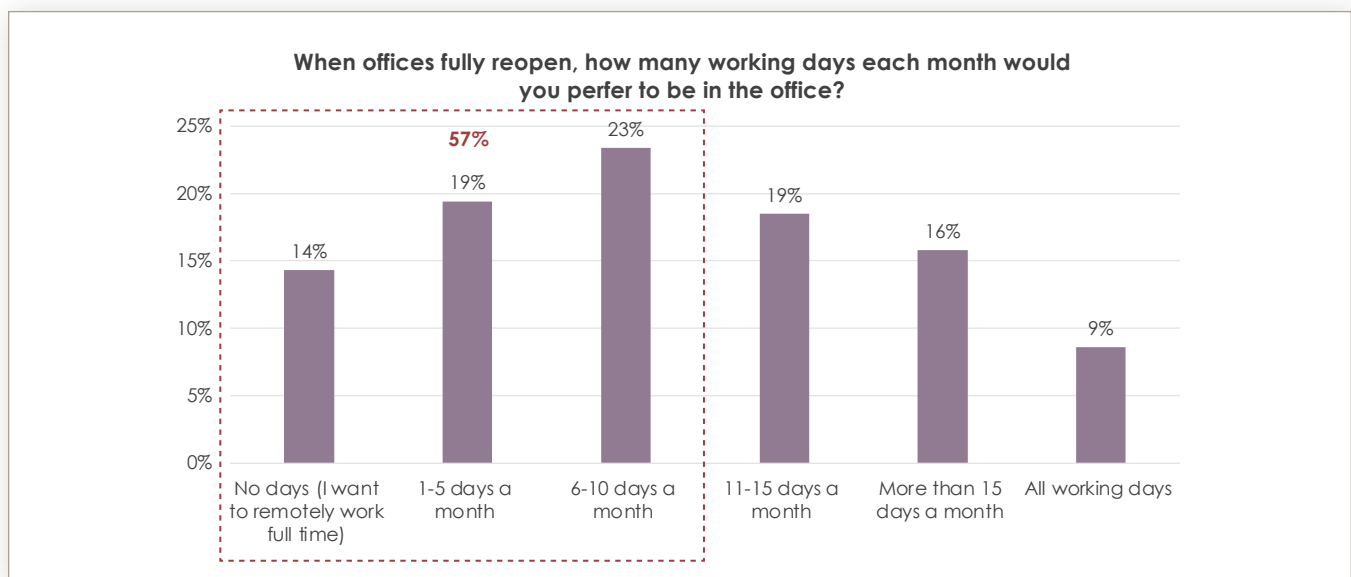Dimensional Research    |    September 2021

## Detailed Findings
### Hybrid Work Model is Receiving Pervasive Adoption

The reality is the hybrid work model has already begun. 62% of those surveyed are already working from both office and remote locations. The remaining 38% also indicated that they don't expect to work full time from the office again.

**Have you returned or plan to return to the office at least a few days each month?**

Yes, when I return to the office I plan to work there a few days each month
38%

Yes, I work in the office at least a few days each month
62%

### Few Want to Return to the Office Full Time

Businesses initially transitioned to remote work to keep their organizations productive during the pandemic. However, what was thought to be a short-term trend has caused a permanent shift in the mindset of the workforce. When the research asked participants what work model they wanted going forward, they expressed a clear desire for continued remote or hybrid work.  57% said they wanted to work in the office 10 days or less per month. Perhaps just as telling, only 9% of knowledge workers wanted to return to the office full-time. In fact, more than half (57%) of all workers would consider leaving their current employer if forced to return to the office 100% of the time.

**When offices fully reopen, how many working days each month would you perfer to be in the office?**

| Category | Percent |
|---|---|
| No days (I want to remotely work full time) | 14% |
| 1-5 days a month | 19% |
| 6-10 days a month | 23% |
| 11-15 days a month | 19% |
| More than 15 days a month | 16% |
| All working days | 9% |

**57%**

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## Office Environments Must Increasingly Facilitate Team Interactions

With knowledge workers showing a strong preference for working from home, we asked why they would go into the office. The top three answers all centered around direct interactions with colleagues with team building (51%) taking the top spot, followed closely by collaboration activities (47%) and connecting with peers (46%). Another key takeaway to consider: employees see themselves coming to the office for resources they may not have at home, such as access to better hardware and software (31%) and better network connection (29%). These last two findings suggest key opportunities for employers to further empower those working from home.

**For which reasons would you go into the office?**

| Reason | Percentage |
|---|---|
| Team building | 51% |
| Collaborating with colleagues | 47% |
| Connection to peers | 46% |
| Company mandate | 37% |
| Training | 31% |
| Access to technology (software and/or hardware) I don't have at home | 31% |
| Better network connection | 29% |
| Removing myself from a distracting environment | 28% |
| My role requires me to be in the office | 27% |
| I would not go into the office for any reason | 5% |

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## Safety and Productivity Top Concerns about Returning to the Office

Next, the research sought to learn directly from knowledge workers what concerns them most about returning to the office. The top answers all related to safety: social distancing (54%), using shared devices (44%), and lack of necessary improvements (35%).  Another recent study echoed this sentiment, finding that 97% wanted changes made to the office to ensure their safety before they return. The inability to collaborate with remote colleagues (32%) showed up just behind safety concerns. This reinforces how important collaboration is to the hybrid worker—it is the top reason they want to come to the office once personal safety is addressed.
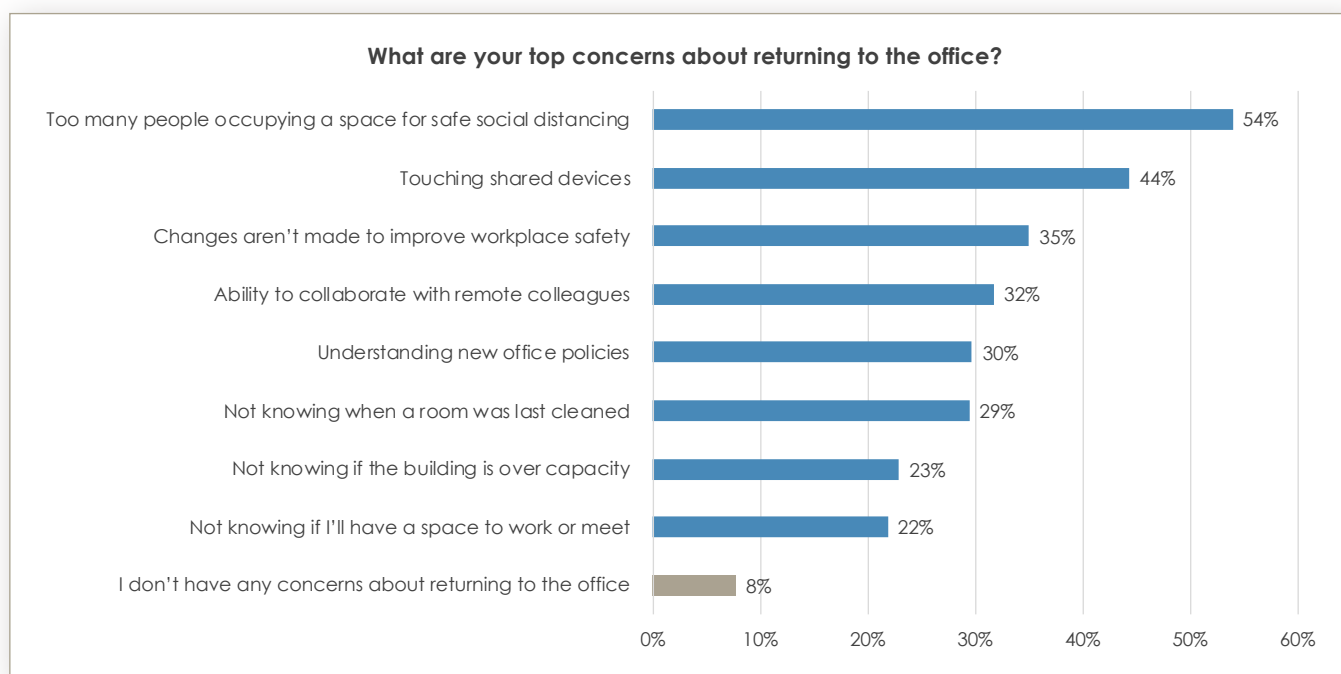
**What are your top concerns about returning to the office?**

| Concern | Percentage |
|---|---|
| Too many people occupying a space for safe social distancing | 54% |
| Touching shared devices | 44% |
| Changes aren't made to improve workplace safety | 35% |
| Ability to collaborate with remote colleagues | 32% |
| Understanding new office policies | 30% |
| Not knowing when a room was last cleaned | 29% |
| Not knowing if the building is over capacity | 23% |
| Not knowing if I'll have a space to work or meet | 22% |
| I don't have any concerns about returning to the office | 8% |

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## Key Technologies Will Aid the Transition Back to the Office

The previous findings have made it clear that offices need to adapt to enable hybrid workers and ensure their safety. The research further drilled down to specific technologies that would help the office as workers return. Staying informed topped the list with a request for real-time digital signage. Devices that make collaboration both easier and safer came in a close second at 45%. Easy space reservation (44%) was also desired as workers need the ability to secure proper spaces to work or collaborate.  Most of the remaining answers follow the theme of technology that makes them feel safer or helps them collaborate more easily.
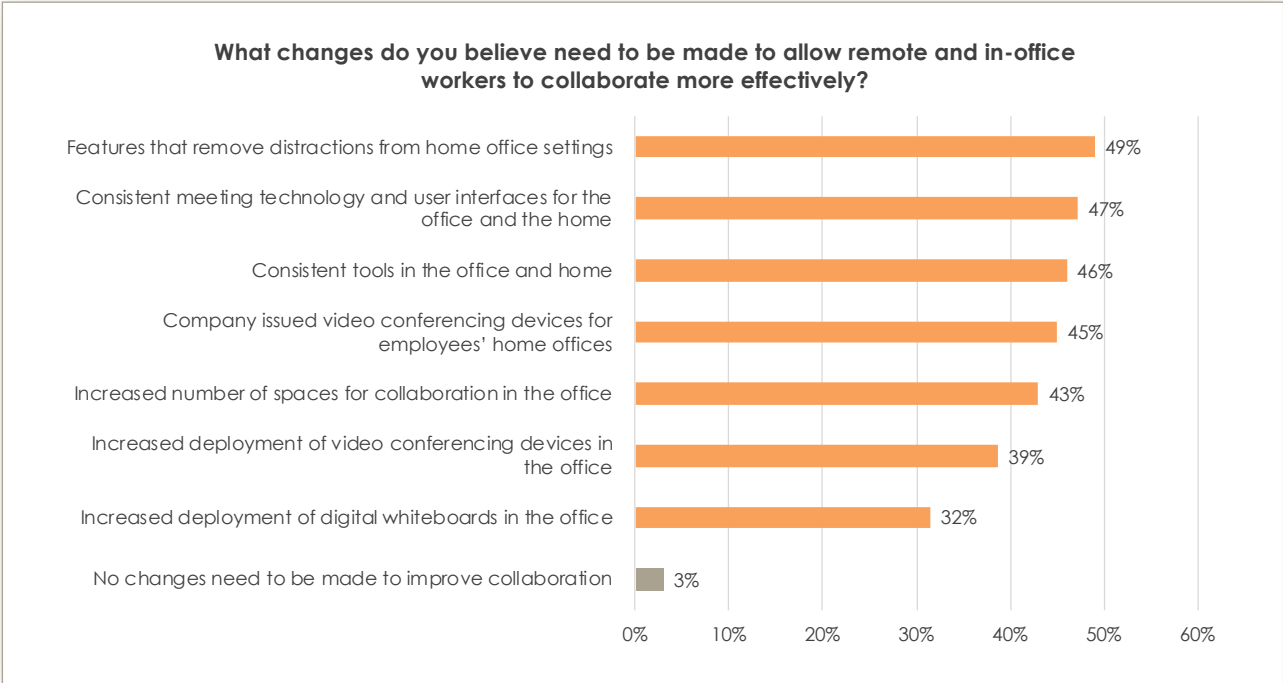
**Which of the following technologies would help provide an easier transition back to the office for hybrid workers?**

| Technology | Percentage |
|---|---|
| Digital signage that displays company notifications | 46% |
| Collaboration devices that automatically pair with personal devices for touchless meeting controls and content sharing | 45% |
| Simple space reservation technology | 44% |
| Consistent user interface for meetings in every space | 43% |
| Real-time insights into how spaces are being utilized | 41% |
| Insights into environmental health | 37% |
| In-room sensors that measure room capacity and provide overcrowding alerts | 35% |
| Voice controlled touchless meeting controls | 34% |
| Voice controlled room booking | 26% |
| Wayfinding capabilities | 25% |
| None of the above | 1% |

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## Tool and Office Changes to Improve Hybrid Worker Collaboration

The research then focused specifically on what is needed to improve collaboration in the hybrid work model. As previous research discovered, 98% of knowledge workers believe meetings will now have at least one remote participant. The top feature hybrid workers felt they needed to improve collaboration was the ability to remove distractions from the home office (49%), which our research has found to often be unwanted noise.  Nearly half (46%) wanted consistent tools at home and in the office, as well as meeting and collaboration technology with the same interface (47%). Understandably, they felt the company should provide video conferencing devices (45%) to help create the unified collaboration experience they are requesting. 43% of hybrid workers directly asked for more office space dedicated to support collaboration, along with additional conferencing devices (39%) and digital whiteboards (32%) to better enable collaboration.

**What changes do you believe need to be made to allow remote and in-office workers to collaborate more effectively?**

| Category | Percentage |
|---|---|
| Features that remove distractions from home office settings | 49% |
| Consistent meeting technology and user interfaces for the office and the home | 47% |
| Consistent tools in the office and home | 46% |
| Company issued video conferencing devices for employees' home offices | 45% |
| Increased number of spaces for collaboration in the office | 43% |
| Increased deployment of video conferencing devices in the office | 39% |
| Increased deployment of digital whiteboards in the office | 32% |
| No changes need to be made to improve collaboration | 3% |

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## The Growth of Collaboration Spaces to Enable Hybrid Workers

Those responsible for supporting employees—such as executives, facilities, and HR— were asked what changes were in fact being made to the office space to enable the hybrid work environment. 95% indicated they are increasing the number of spaces dedicated to collaboration activities. And 97% are growing the number of spaces that will be outfitted with video conference tools. Thus, employers are listening to hybrid worker requests and anticipating their needs to better enable collaboration.
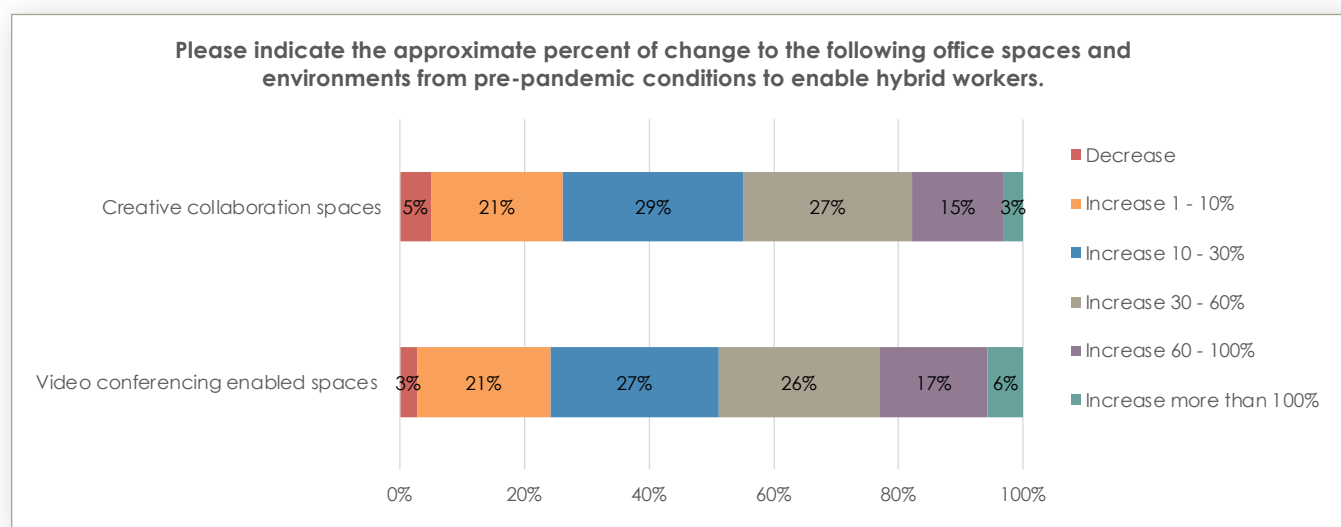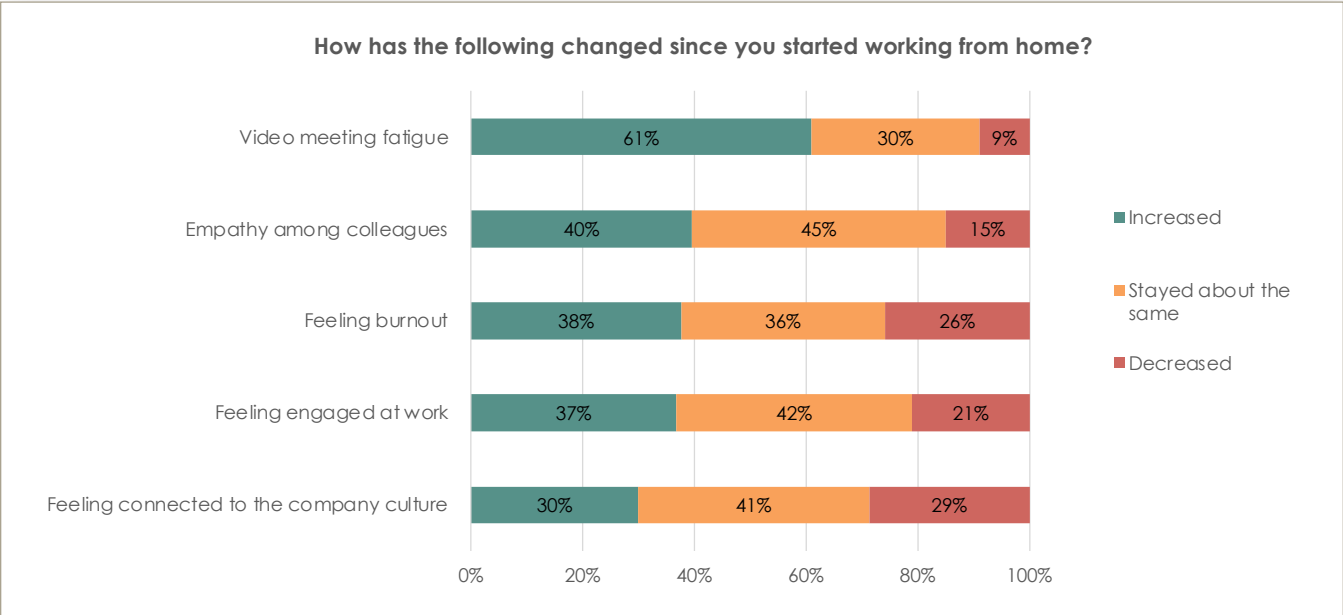
**Please indicate the approximate percent of change to the following office spaces and environments from pre-pandemic conditions to enable hybrid workers.**

| | Decrease | Increase 1 - 10% | Increase 10 - 30% | Increase 30 - 60% | Increase 60 - 100% | Increase more than 100% |
|---|---|---|---|---|---|---|
| Creative collaboration spaces | 5% | 21% | 29% | 27% | 15% | 3% |
| Video conferencing enabled spaces | 3% | 21% | 27% | 26% | 17% | 6% |

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## Video Meeting Fatigue and Burnout Levels have Increased

The research also focused on understanding the emotional state of workers today. The findings showed that video meeting fatigue has grown significantly as indicated by 61% of the participants. The percentage of respondents experiencing burnout (38%) also grew. However, despite the stress of the pandemic, several areas remained about the same or improved slightly, including empathy among colleagues and feeling engaged at work. Company culture expectedly has not improved as most (41%) perceive it as unchanged, while near equal amounts indicated it improved (30%) and worsened (29%).

**How has the following changed since you started working from home?**

| | Increased | Stayed about the same | Decreased |
|---|---|---|---|
| Video meeting fatigue | 61% | 30% | 9% |
| Empathy among colleagues | 40% | 45% | 15% |
| Feeling burnout | 38% | 36% | 26% |
| Feeling engaged at work | 37% | 42% | 21% |
| Feeling connected to the company culture | 30% | 41% | 29% |

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## Key Capabilities and New Routines Can Help Reduce Burnout

Given the growing feelings of burnout, participants were asked what they thought would help reverse the trend. The top choices were reminders to take breaks (52%) and recommendations to optimize the work schedule (47%) to help improve work-life balance. The pressure of constant meetings couldn't be clearer, as 45% responded that meeting-free days could reduce burnout. In fact, 88% reported they would be more productive if the company sanctioned meeting-free days. And again, hybrid workers thought collaboration devices that provided better face-to-face interactions were critical (43%).
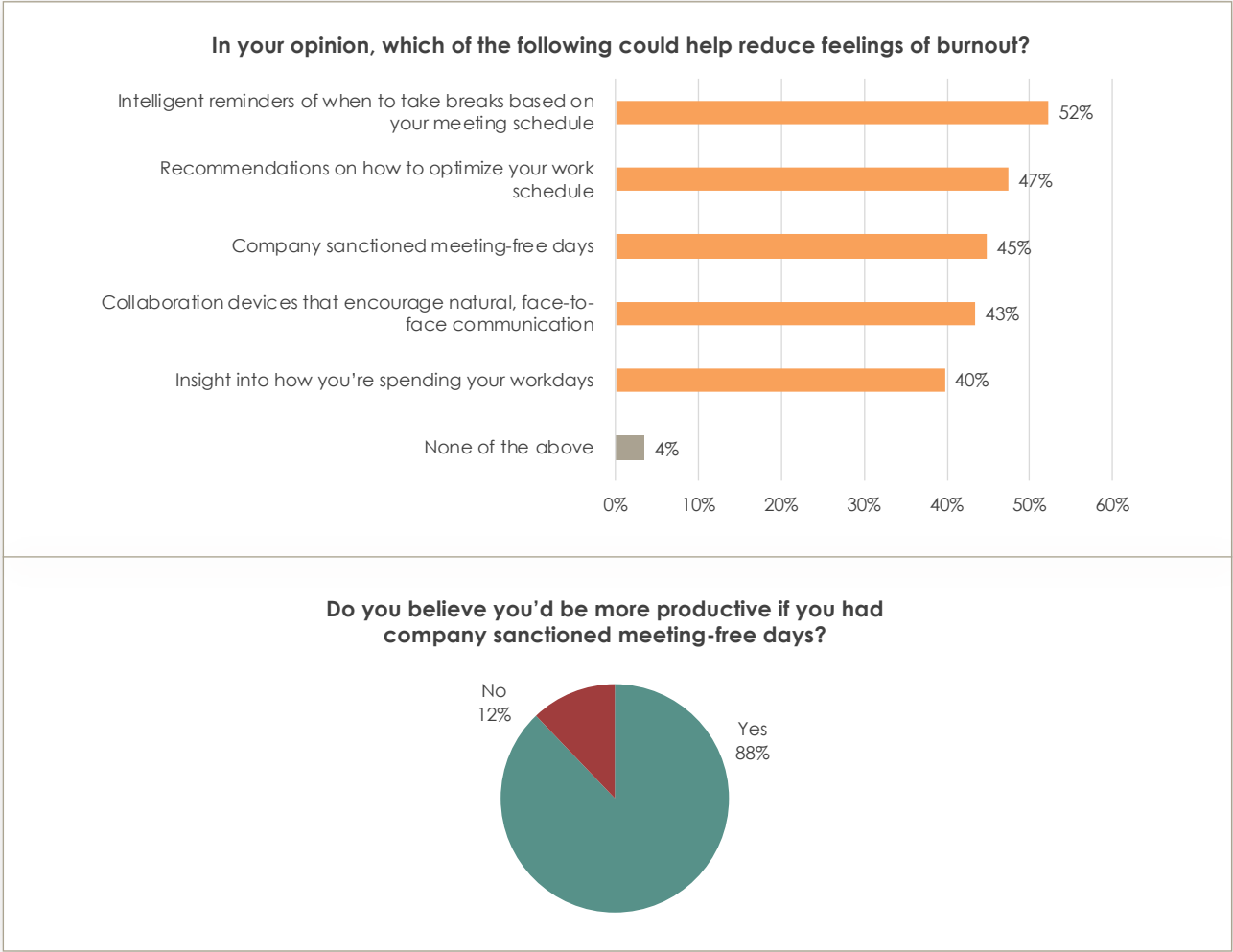
**In your opinion, which of the following could help reduce feelings of burnout?**

| Response | Percentage |
|---|---|
| Intelligent reminders of when to take breaks based on your meeting schedule | 52% |
| Recommendations on how to optimize your work schedule | 47% |
| Company sanctioned meeting-free days | 45% |
| Collaboration devices that encourage natural, face-to-face communication | 43% |
| Insight into how you're spending your workdays | 40% |
| None of the above | 4% |

**Do you believe you'd be more productive if you had company sanctioned meeting-free days?**

- No 12%
- Yes 88%

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## Work From Home Fears Need to be Addressed

While most surveyed in this report want the hybrid work model and report numerous benefits, the research did uncover some fears. 64% worried that working from home will result in them being treated differently than those in the office. Often meetings can be ad-hoc and sporadic and more than half of them (57%) were concerned they won't be invited to key meetings that could have work or political ramifications.
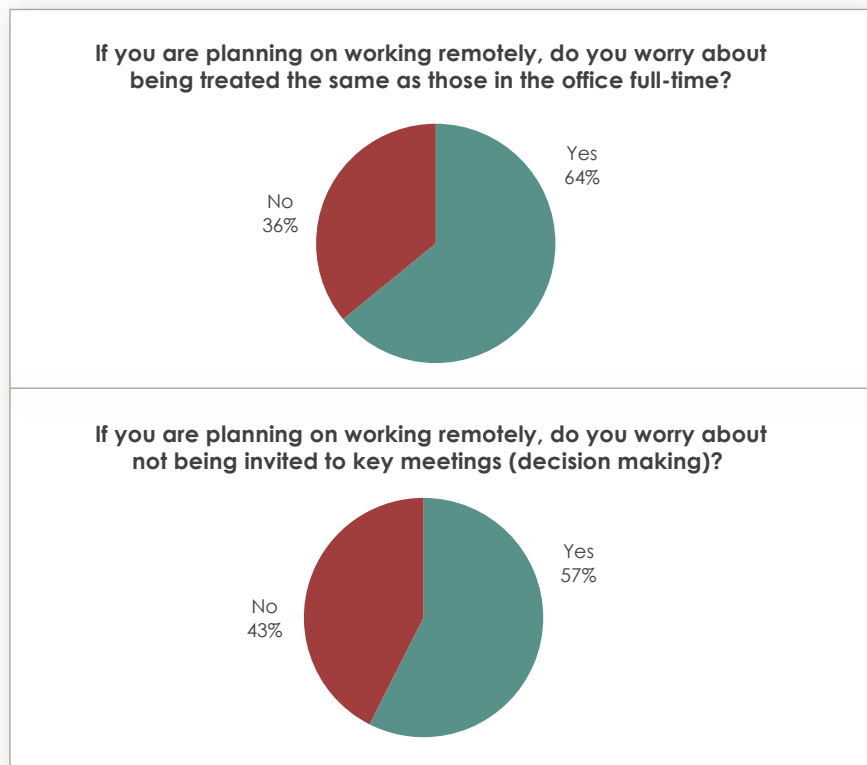
**If you are planning on working remotely, do you worry about being treated the same as those in the office full-time?**

No
36%

Yes
64%

**If you are planning on working remotely, do you worry about not being invited to key meetings (decision making)?**

No
43%

Yes
57%

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## Key Capabilities Make Workers Feel More Included

To help combat video fatigue and concerns about being treated differently, we asked hybrid workers what would make people feel more included in meetings. 97% of those surveyed believed new features and capabilities could make them feel more included. The top answer, at 57%, was ensuring everyone has an opportunity to speak and contribute to the meeting. Knowledge workers also want to quickly share opinions and agreement with non-verbal options (45%), like reaction emojis (smiley face, thumbs up, raised hand, etc.). Hybrid workers wanted other non-verbal options (40%) such as a chat window. Much of this report centers around collaboration and here participants identified specific features such as digital whiteboarding, screensharing, and annotations (38%) that help enable discussion and brainstorming. The desire to feel connected had 36% asking for a video of each participant and not just a single video of all the people in a meeting room. People also wanted to feel comfortable being on video and ensure unwanted noise doesn't disrupt the meeting, leading 35% to again ask for features like noise removal and virtual backgrounds to remove distractions.
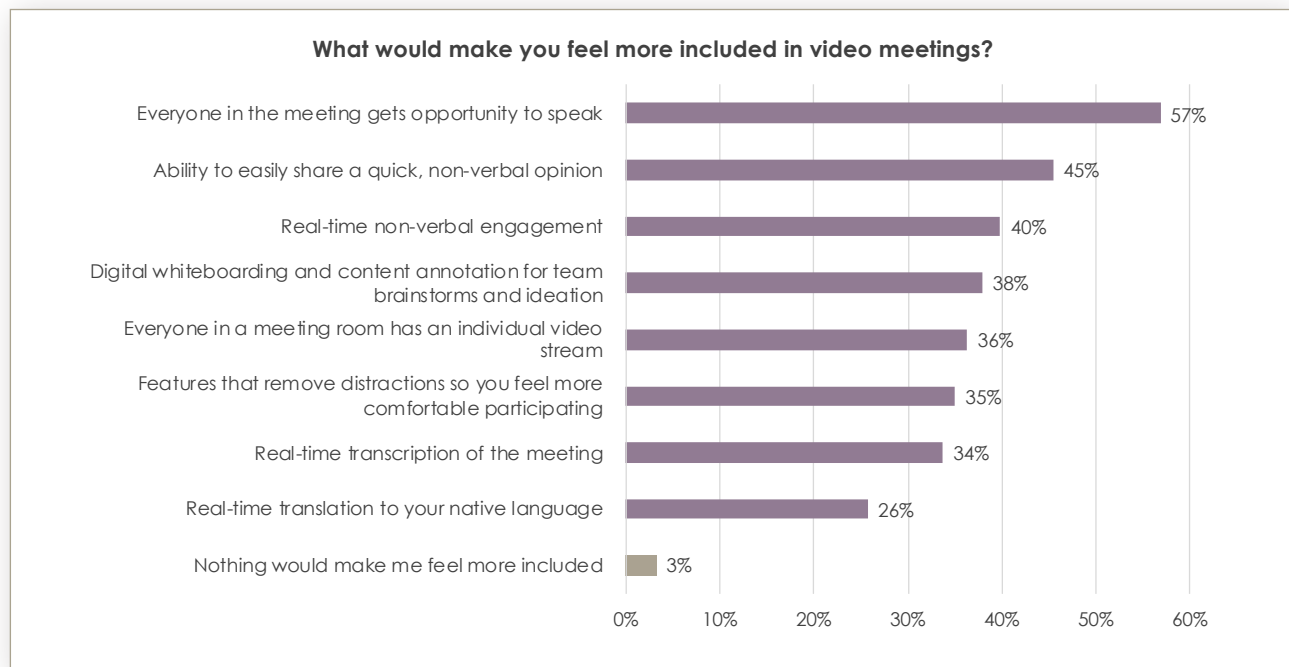
**What would make you feel more included in video meetings?**

| | |
|---|---|
| Everyone in the meeting gets opportunity to speak | 57% |
| Ability to easily share a quick, non-verbal opinion | 45% |
| Real-time non-verbal engagement | 40% |
| Digital whiteboarding and content annotation for team brainstorms and ideation | 38% |
| Everyone in a meeting room has an individual video stream | 36% |
| Features that remove distractions so you feel more comfortable participating | 35% |
| Real-time transcription of the meeting | 34% |
| Real-time translation to your native language | 26% |
| Nothing would make me feel more included | 3% |

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## Advanced Features Significantly Improve Meeting Productivity

Knowledge workers were then asked to prioritize key meeting and collaboration features by how much it would increase their productivity during meetings. Real-time, non-verbal communication leads all capabilities with 95% indicating it would increase productivity and 75% citing a productivity improvement of 11% or more. Automatic noise removal was commonly discussed, with 94% claiming similar improvements. The next set of features chosen to improve worker productivity was the creation and distribution of actions items that 93% reported would deliver productivity gains. Real time transcriptions (90%) would be a boon for notes and international meetings. 84% shared professional profiles would help their productivity.
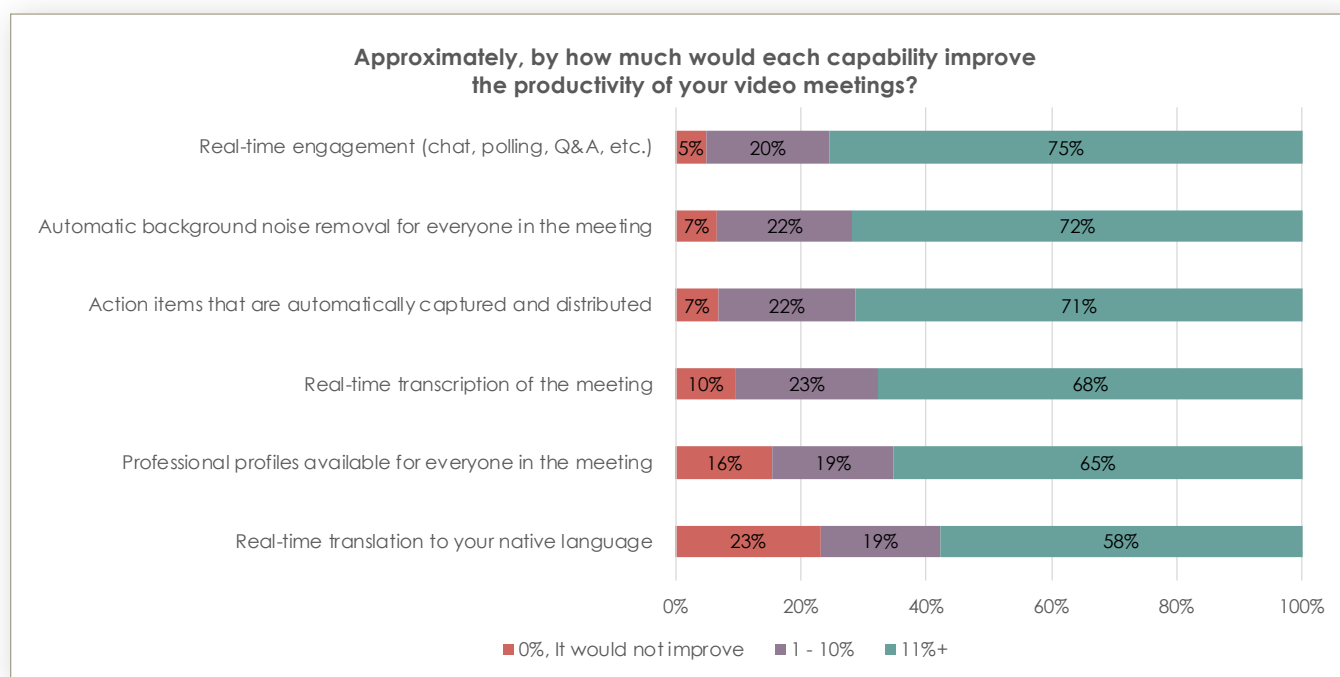
**Approximately, by how much would each capability improve the productivity of your video meetings?**

| Capability | 0%, It would not improve | 1 - 10% | 11%+ |
|---|---|---|---|
| Real-time engagement (chat, polling, Q&A, etc.) | 5% | 20% | 75% |
| Automatic background noise removal for everyone in the meeting | 7% | 22% | 72% |
| Action items that are automatically captured and distributed | 7% | 22% | 71% |
| Real-time transcription of the meeting | 10% | 23% | 68% |
| Professional profiles available for everyone in the meeting | 16% | 19% | 65% |
| Real-time translation to your native language | 23% | 19% | 58% |

■ 0%, It would not improve   ■ 1 - 10%   ■ 11%+

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### IT Professionals Concerned about Scaling Collaboration Solutions

Many of the knowledge workers surveyed were also IT professionals and we sought to gain their perspective on enabling a hybrid workforce from a technology perspective. Nearly 7 out of 10 IT professionals were concerned about their ability to support and scale the collaboration solutions across the office as well as the home work-space. As noted in this report, each hybrid worker needs better equipment, software, and connectivity when working from home. While IT used to just be responsible for in-office collaboration, often in meeting rooms, that responsibility has grown by hundreds or thousands of locations. And the office space is also changing, requiring even more collaboration spaces and related devices. It is certainly understandable why IT is already concerned about serving and supporting so many new collaboration users.
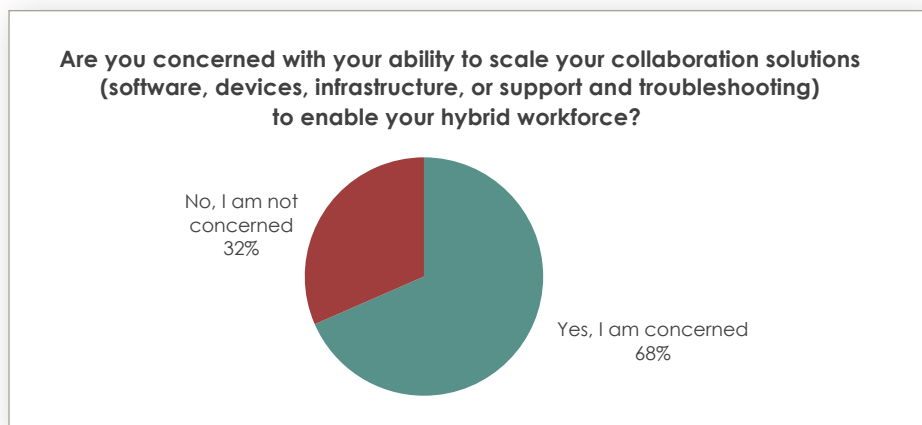
**Are you concerned with your ability to scale your collaboration solutions (software, devices, infrastructure, or support and troubleshooting) to enable your hybrid workforce?**

No, I am not concerned
32%

Yes, I am concerned
68%

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## Conclusion

This research finds that the hybrid work model is happening now, and is widespread. A majority of those surveyed already split time working from home and in the office. Employees want the benefits of working remotely and are so committed to the hybrid work model they will consider finding new employment to protect it.

Employees primarily want to return to the office for face-to-face contact and collaboration. And while their top concerns about returning to the office are centered around personal safety, a close second is ensuring effective collaboration with those not in the office. Participants listed numerous technology features and capabilities that facilitate and improve the new hybrid work model, focusing on safety, communications, and better collaboration solutions. They want the same collaboration experience whether at home or in the office and need collaboration features that support inclusivity, nonverbal communication, removal of unwanted distractions, digital white-boarding, and more.

These key features can help combat video meeting fatigue, burnout, and lack of connectedness to the company culture. The hybrid worker and the employer must work together to encourage better work scheduling, frequent breaks, and perhaps the creation of a meeting-free day each week. Better collaboration solutions and a focus on positive, inclusive culture will make employees feel more connected and help dispel feelings that those at home could be treated differently or left out.

The reality is, the old office environment does not fully enable the hybrid worker, and employers have responded by adding more collaboration and meeting-enabled spaces. This is a needed change for everyone but results in exponentially more work for the IT team to ensure everyone has the latest collaboration solutions and that they are up and running. This means careful considerations should be made as to which collaboration solutions are enterprise-ready for both the home and the office space, as well as which are the easiest to deploy and manage for IT. The hybrid worker exists right now, and we are facing an inflection point for businesses. Companies that embrace and enable the hybrid model will have happier employees and better productivity.

## Survey Methodology

Knowledge workers at all seniority levels representing companies of all sizes were invited to participate in a survey on their experiences working from home and considerations for returning to the office. The survey focused on both emotional aspects and trends and collaboration tool use and effectiveness.

A total of **2366 qualified participants** completed two surveys. 816 participants completed the first survey where they worked at home at least one day each week, and 1550 participants completed the second survey where they both worked from home and were--or plan to be--in the office at least 5 days each month. The surveys were administered electronically, and participants were offered a token compensation for their participation. Participants were from 5 continents.

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## About Dimensional Research

Dimensional Research provides practical marketing research to help technology companies make their customers more successful. Our researchers are experts in the people, processes, and technology of corporate IT and understand how IT organizations operate. We partner with our clients to deliver actionable information that reduces risks, increases customer satisfaction, and grows the business.

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## About Webex by Cisco

Webex by Cisco creates collaboration software and tools for calling, meeting, messaging, audience engagement, events, contact centers, and devices, with an emphasis on ease-of-use for the user, and flexibility in allowing teams to collaborate remotely from anywhere with web access. Webex places emphasis on inclusivity; more specifically the idea that every user can be seen, heard and be able to fully participate in remote collaboration. In June 2021, they launched the Webex Suite, which offers purpose-built solutions for hybrid work. The Webex suite features enterprise grade security, AI-powered, integrated management tools.

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