

THE STATE OF REMOTE WORK: UNDERSTANDING THE BENEFITS, CHALLENGES, AND SOLUTIONS FOR THOSE WORKING FROM HOME

A Global Survey of Knowledge Workers

July
2021



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Introduction

This paper reviews key findings from two global primary research surveys focused on understanding the emotional experiences of home-based workers and the tools needed to support those working from home. A total of 2366 participants at all seniority levels who perform work from home on a regular basis are represented in this report.

The research investigates both emotional and physical trends representing benefits or detriments to working from home. The research also focused on understanding meeting collaboration tools issues, challenges, and missing capabilities, as well as what is needed to improve meeting experiences, inclusiveness, and productivity.

Executive Summary

This research finds that near 8 out of 10 employees spend at least $\frac{1}{4}$ of every day in meetings, with most roles spending a majority of their workday collaborating with others. Nearly all (99%) remote workers surveyed reported benefits from working from home, such as increased flexibility and no commuting, but they also shared they are working more hours, growing fatigued, experiencing burnout, and feeling isolated.

9 out of 10 surveyed indicated they experience issues with video meetings when working from home, such as unwanted background noise, decreased ability to share their opinion, and barriers to collaborating effectively. 97% of those surveyed are looking for features that will help them feel more included in meetings. While many who work from home have an office, nearly a third report they work from multiple locations in their home. 90% of home workers indicated their meeting experience could be improved with key technologies that remove unwanted background noise, mitigate bandwidth issues, provide a digital assistant, and more. Collaboration solutions that enable people to feel included when working remotely may help alleviate the fear that remote workers will be treated differently than their peers who are in the office -- a concern that 64% shared.

This research shows 58% of remote workers consistently turn on video when attending meetings from home. But remote workers who use video frequently are in fact happier, more engaged, empathetic, and reported that it is easier to connect with colleagues. Remote workers who consistently use video also felt more connected to company strategy than those who turn on video less frequently. When companies provided employees collaboration devices, it resulted in employees using video more frequently and being happier with their employer. These research findings indicate that to enable remote and hybrid workers, employers should consider the following:

1. Provide high-quality collaboration devices that remove common household distractions
2. Choose a collaboration solution with features that let everyone feel included in the meeting, regardless of where they are, the language they speak, or their unique needs.
3. Create a culture where video is frequently leveraged.



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Key Findings

- **Remote Workers Report Strong Benefits but are Working More Hours and Feeling Isolated**
 - 99% report benefits to working remotely
 - Work-from-home employees work more hours, spend more time in meetings, and are increasingly fatigued
 - 49% indicate working remotely creates isolation
- **Remote Workers Need Better Tools Which Support Home-Work Environments**
 - 97% reported key collaboration features would make them feel more included in video meetings
 - 31% work from multiple locations at home, with 49% working in a dedicated home office
 - 90% indicated that their home meeting experience can be improved with better collaboration solutions
 - All-in-one video conference device tops list to improve working from home
- **Using Video During Meetings Makes Employees Happier, but Barely Half Do It Consistently**
 - Only 58% frequently turn on their video while in meetings
 - Employees who consistently use video report they are happier with their employer
 - Companies that provide adequate hardware have happier employees who use video more frequently

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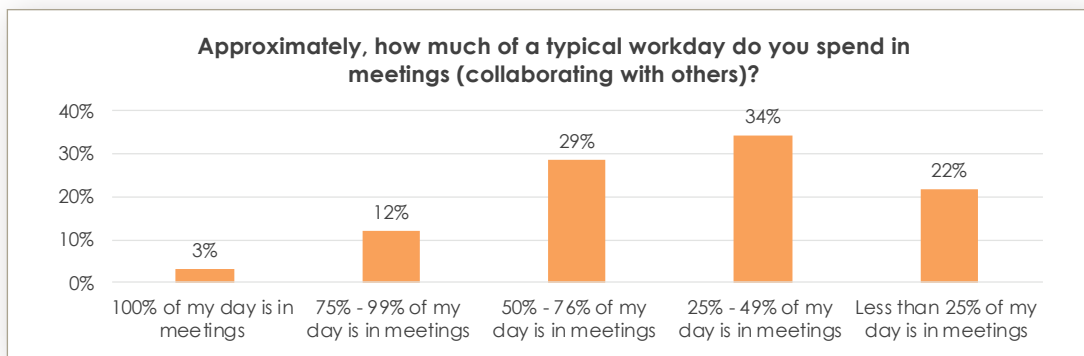


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Detailed Findings

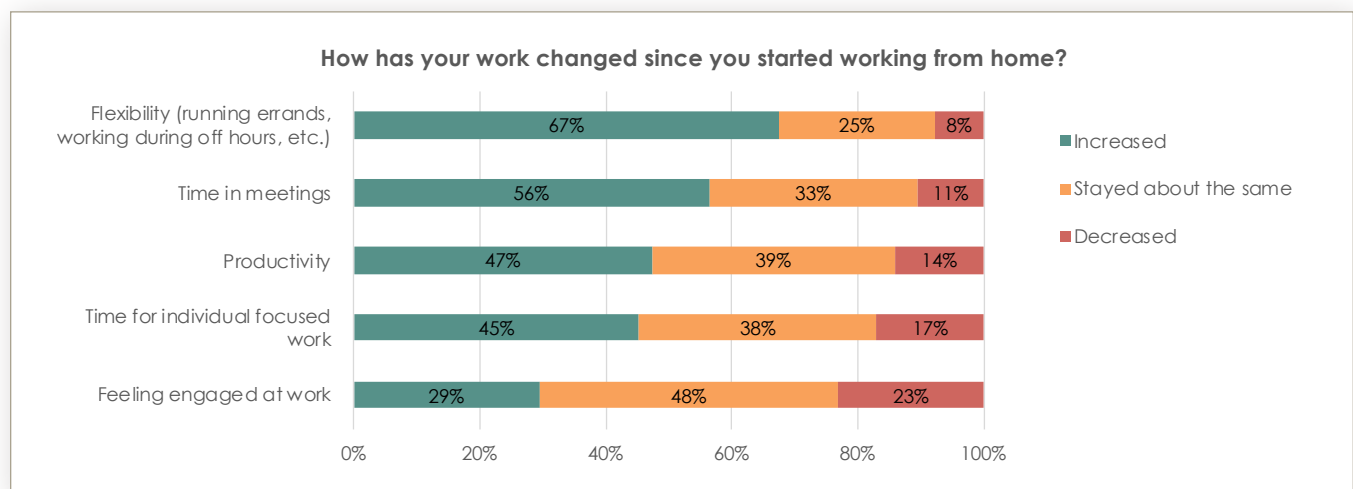
Most Spend at Least a Quarter of Each Day in Meetings

While it is much more common to have to attend meetings via video as a result of the pandemic, this research sought to quantify how much time was spent in meetings on a daily basis. The research revealed that 78% spend at least two hours each workday in meetings and 45% spend half or more of their day in meetings. With remote workers spending that much time each day in meetings, productivity and effective collaboration has become increasingly reliant on collaboration solutions.



Numerous Positive Trends for Knowledge Workers at Home

Working from home has brought strong benefits to both the employee and the employer. 67% of participants stated they have increased flexibility as a result of working from home. And as suspected, more than half (56%) report they are spending more time in meetings, with only 11% saying time in meetings has decreased. The home work environment has increased work productivity for 47% with just 14% saying their productivity has suffered by working from home. This increased productivity is likely tightly coupled to having no commute time and fewer interruptions, as time for focused work also rose by 45%. One metric that was fairly static was feeling engaged at work, with the majority (48%) reporting it was unchanged and nearly equal amounts indicating it increased (29%) and decreased (23%).



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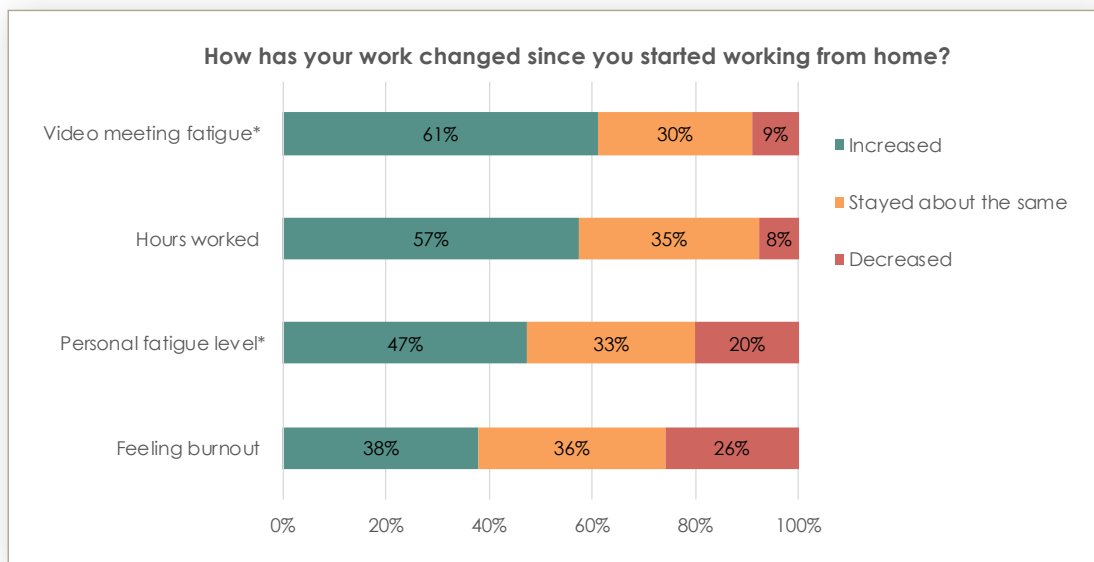
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Not All is Bliss with Current Work-from-Home Model

However, as noted previously in this report, numerous hours in meetings reveals some negative trends, as 61% stated their video meeting fatigue has increased. And while flexibility has increased, it has not manifested itself in less work - in fact 57% indicate they are working more hours now than before, with just 8% say they are working fewer hours. These findings are contributing to 47% that reveal their personal fatigue is increasing. Also growing is the number of workers that state they are just plain burning out (38%). Clearly while benefits are being received by the remote employee, the overall work life balance may not be trending in the right direction.



Supporting Hybrid Workers

The future of work is hybrid. Now is the time to equip teams with the solutions they need to excel in this new era. Webex provides the industry's most comprehensive solution for hybrid workers and brings the best of remote and in-person collaboration together.

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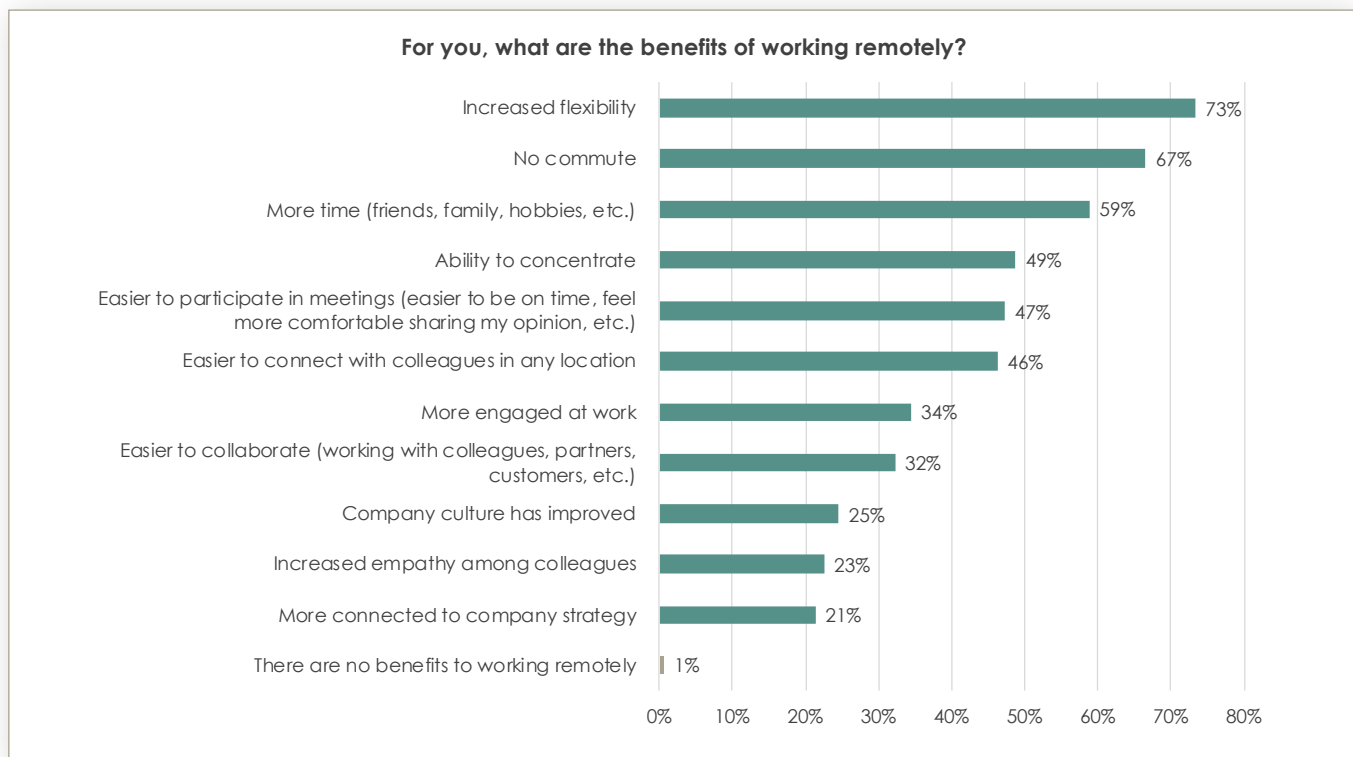
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More Time, No Commute, and Flexibility Top Work from Home Benefits

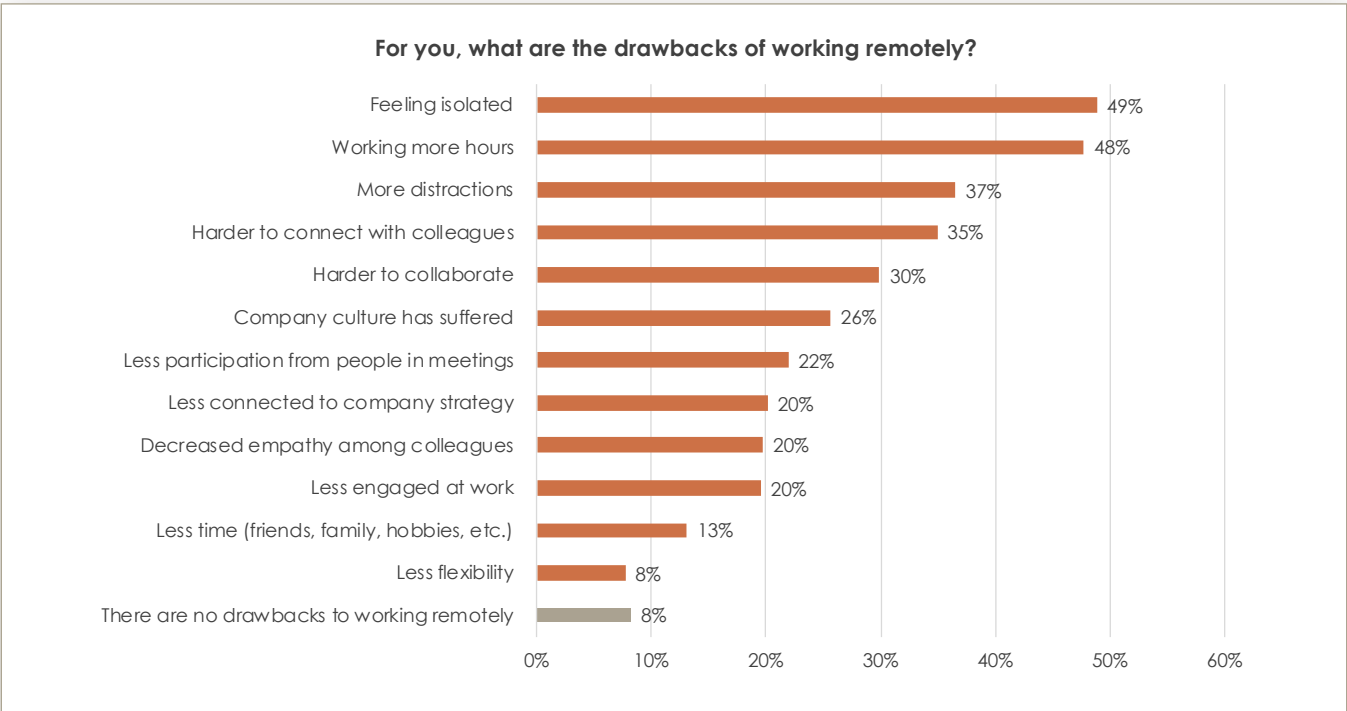
The research wanted to get a better understanding of the direct benefits the employees perceived as a result of working from home and which were the most important to them. At the top (73%) was increased flexibility to handle home and work needs. Perhaps not surprising is the lack of commuting (67%) directly yielding more time and likely less stress at the beginning and end of each day. This lack of commuting is likely what is netting more time for the home worker but, as we learned, they are actually investing more work hours as well. Nearly half (49%) indicated a remote working benefit was the ability to concentrate on work tasks. Rounding out the top 5 was the ability to participate in meetings (47%) more easily, likely a benefit of not having to find the conference room or travel. However, less than half (46%) said video-based collaboration solutions have made it easier to connect to colleagues.





Isolation, Distraction, and Collaboration Issues Lead Remote Worker Woes

To complete a 360-degree view of the home worker, the research also delved in the drawbacks of working from home. Nealy half of all surveyed (49%) indicate they are feeling isolated. We noted previously that remote workers are putting in more hours, and they are aware of it, as it nearly tied for the top drawback at 48%. While some have indicated it is easier to concentrate from home, 37% shared there are more distractions. But over a third reported working remotely made it harder to connect with colleagues (35%) and harder to collaborate (30%), indicating new solutions and approaches are needed for those working from home.



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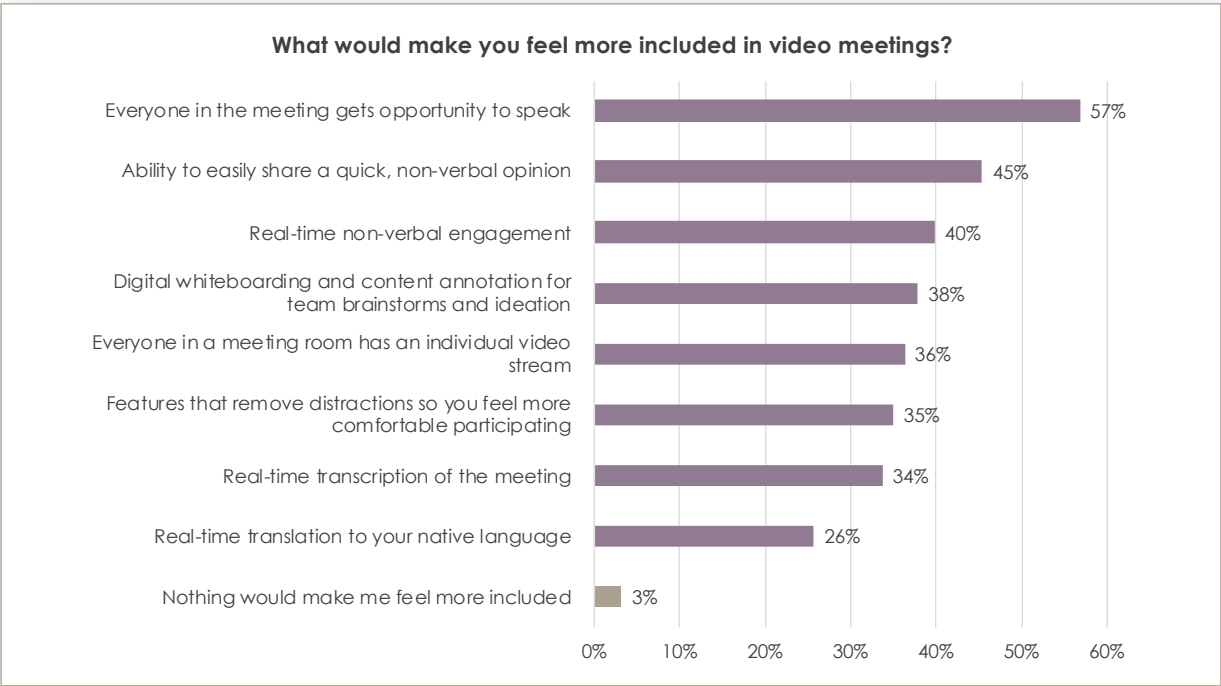
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New Features Needed to Increase Video Meeting Inclusivity

To help alleviate some of the detriments of working from home, we asked the participants what would make them feel more included in meetings. 97% shared that key collaboration features would make them feel more included in meetings with the top response focused on ensuring that everyone in the meeting has an opportunity to speak and contribute (57%). Knowledge workers also shared that they want the ability to share a non-verbal opinion (45%) during a meeting, something often done with emoticons on chat applications such as a thumbs up, smiley face, question mark, etc. 40% of remote workers want real-time non-verbal engagement such as a chat window, a quick poll, etc. Better collaboration tools, such as digital whiteboards or easy on-screen annotations, are needed to provide better interaction and inclusivity, reported 38%. More than one third (36%) wanted each participant to have their own video stream that allows them to see each participants face and expressions. This is something lost when people don't turn on their video or attendees are sitting in a conference room with a camera providing one view of all the participants in a meeting.



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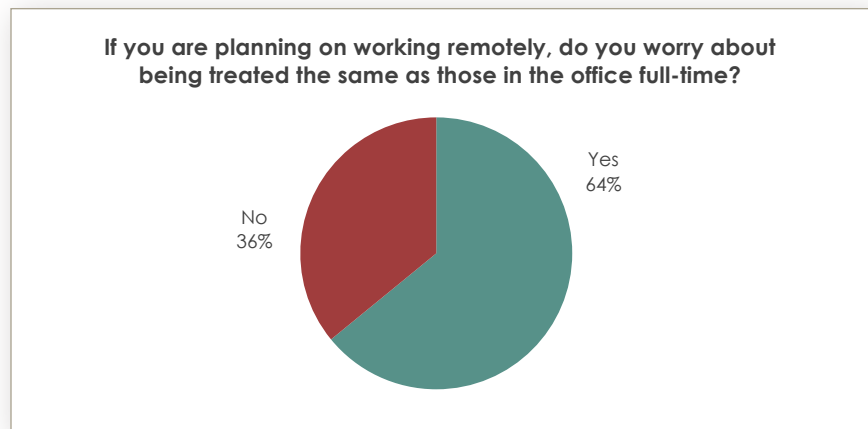
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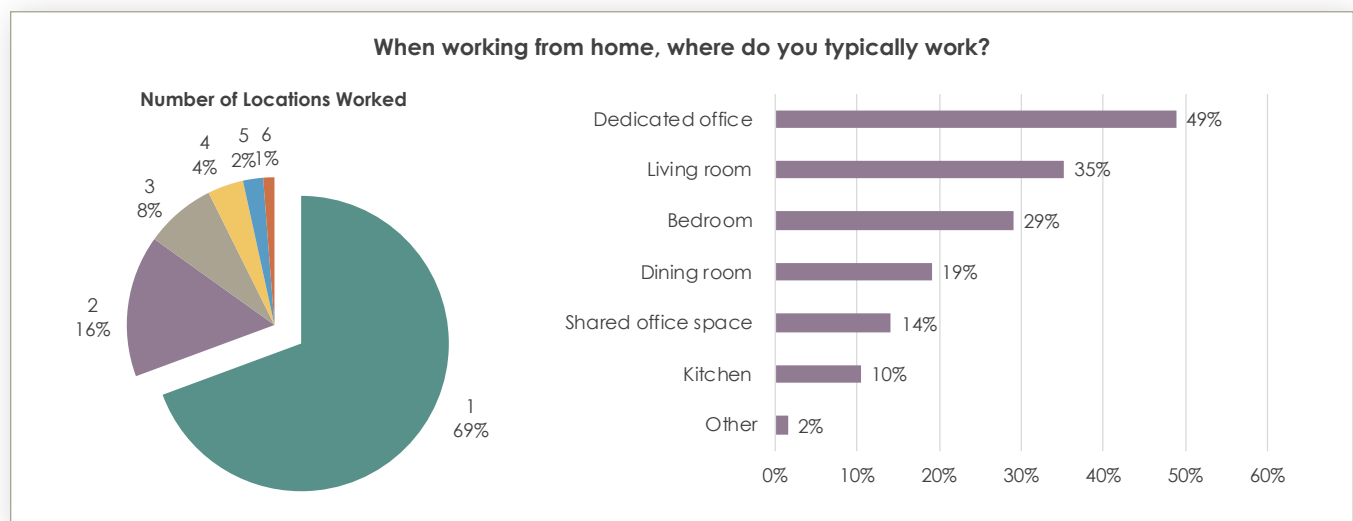
Remote Workers Worry about Being Treated Differently

Previous research has indicated that working from home will continue long after the pandemic ends and will likely be part of the new normal working paradigm. However, 64% fear that working remotely will lead to being treated differently. This clearly increases the importance of being able to effectively participate and collaborate when working remotely.



Home Workers Use Different Spaces and Move Around

To understand what can be done to enable the remote worker we needed to understand the various home work environments. When asked where people work when at home, we found that a majority (69%) tend to work from one location. However, it does mean that roughly 30% routinely move around and work in different locations, which necessitates work, meeting, and collaboration solutions that can be easily moved. The research does indicate nearly half (49%) have a dedicated office, but work also occurs in the living room (35%), bedroom (29%), or the dining room (19%), as well as other spaces that could be subject to noise, poor lighting, and other sub-optimal conditions.



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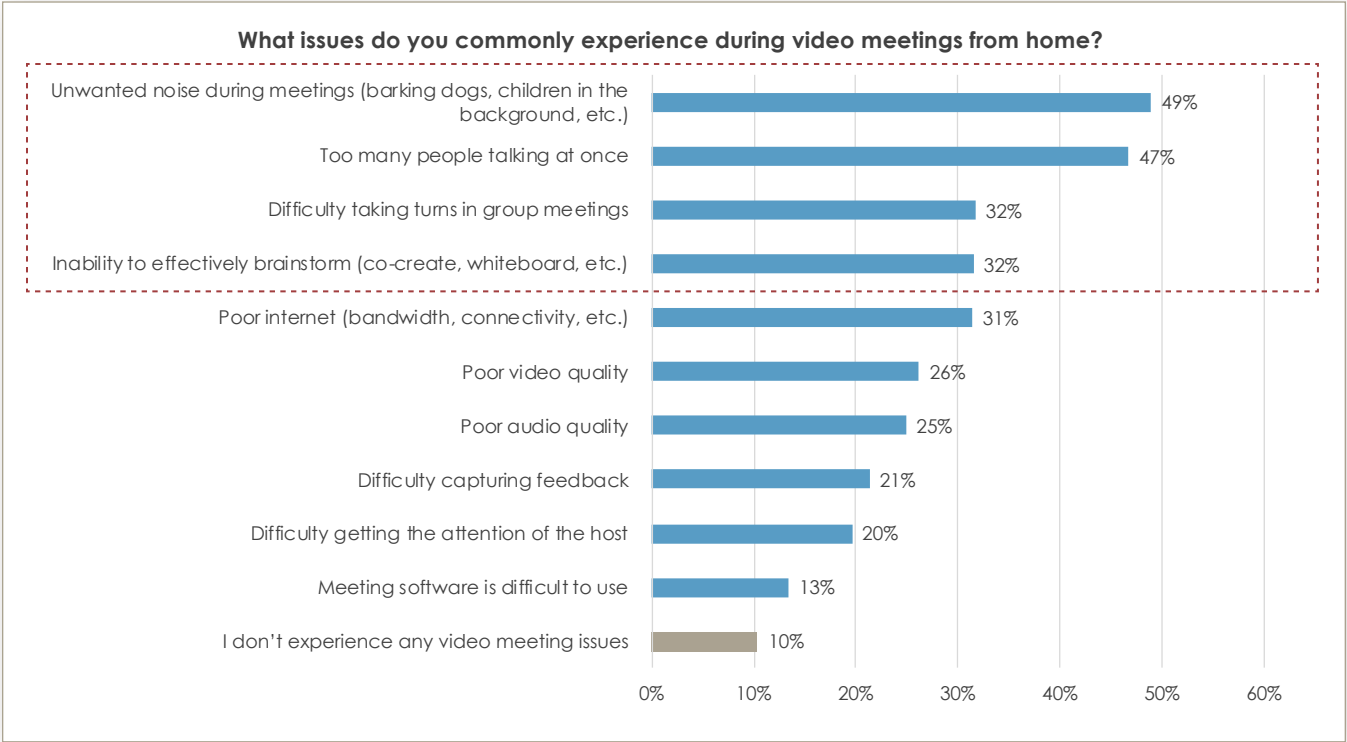
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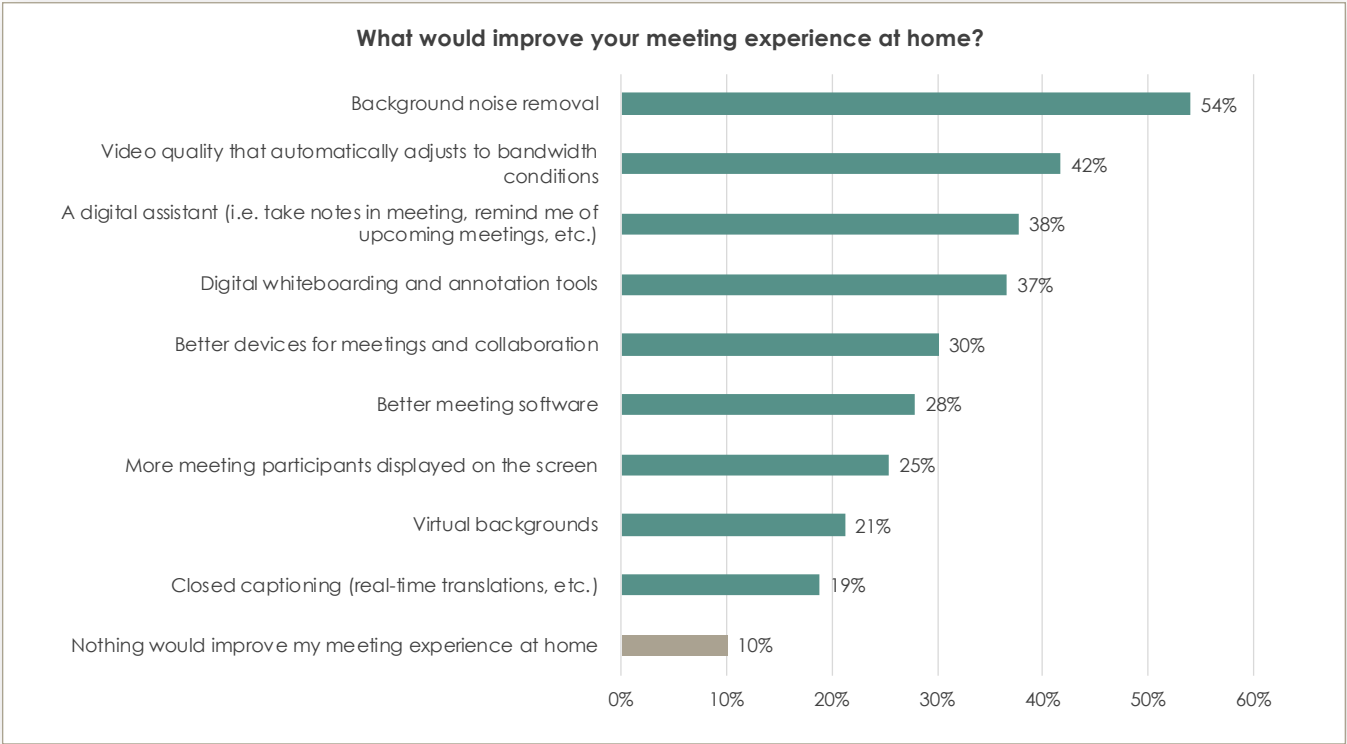
Noise and Team Interaction Issues Top Problems with Video Meetings

Given the variety of locations that home workers use and the numerous types of disruptions that can occur when working from home, it is no surprise that the top issue (49%) for video meetings is unwanted noise. More audio challenges take the second slot (47%) with too many people talking. The next two issues really point to challenges in collaboration with needed improvements in non-verbal communication and better ways to visually share ideas for brainstorming and collaborating. We also see other challenges as meetings are affected by poor internet bandwidth (31%), video quality (26%), and audio quality (25%).



Home Workers Need Improved Meeting Solutions

When asked what would improve their home meeting experience, 90% of participants felt that there were opportunities for improvement. Most of these directly correlated to issues and challenges previously discussed in this report. Removing background noise ranked highest among participants (54%). They also want dynamic video quality to prevent stutters and disconnects (42%) when they have internet bandwidth issues. Many of those surveyed (38%) want a digital assistant to take notes, create reminders, schedule follow up meetings, etc. Also appearing again was the need for better digital whiteboarding and visual annotation tools (37%) to improve collaboration.



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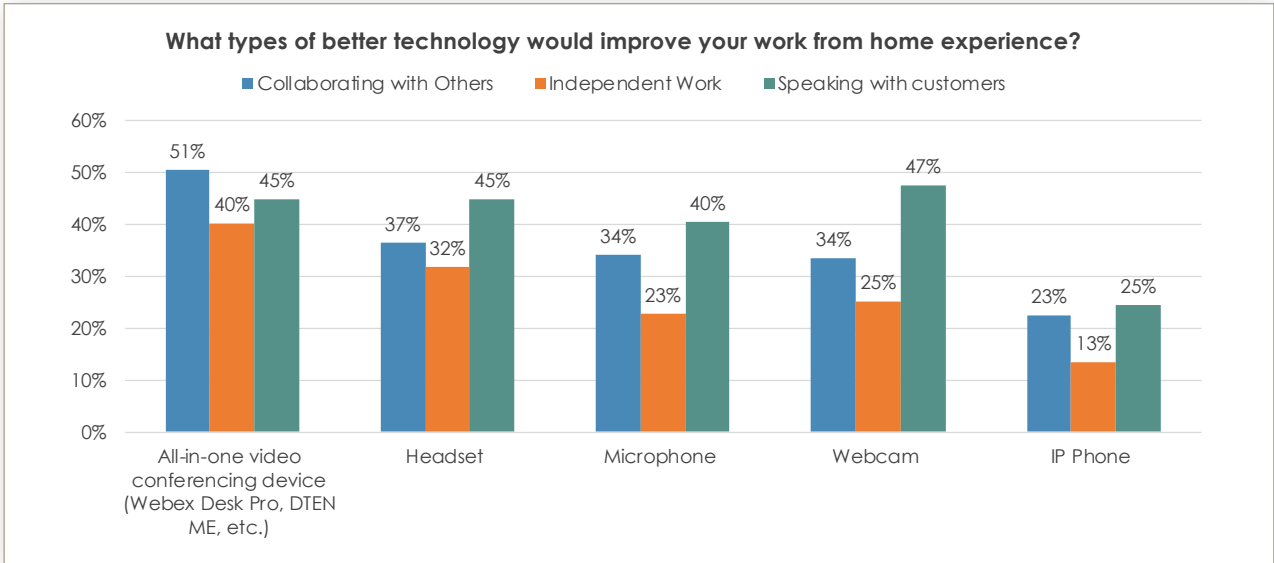
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All-in-One Meeting Devices Wanted for Better Remote Work

The data indicates that at-home workers need better solutions for meetings including both devices (hardware) and software. However, not all workers have similar roles which could change the frequency and type of meetings they may have. We asked participants if their role primarily required them to collaborate with others, interact with customers, or their work was mostly independent-focused work. When directly asked what would improve their meeting experience and effectiveness, all participants wanted an all-in-one video conference device, regardless of their role. This represents a key universal need for all remote workers.



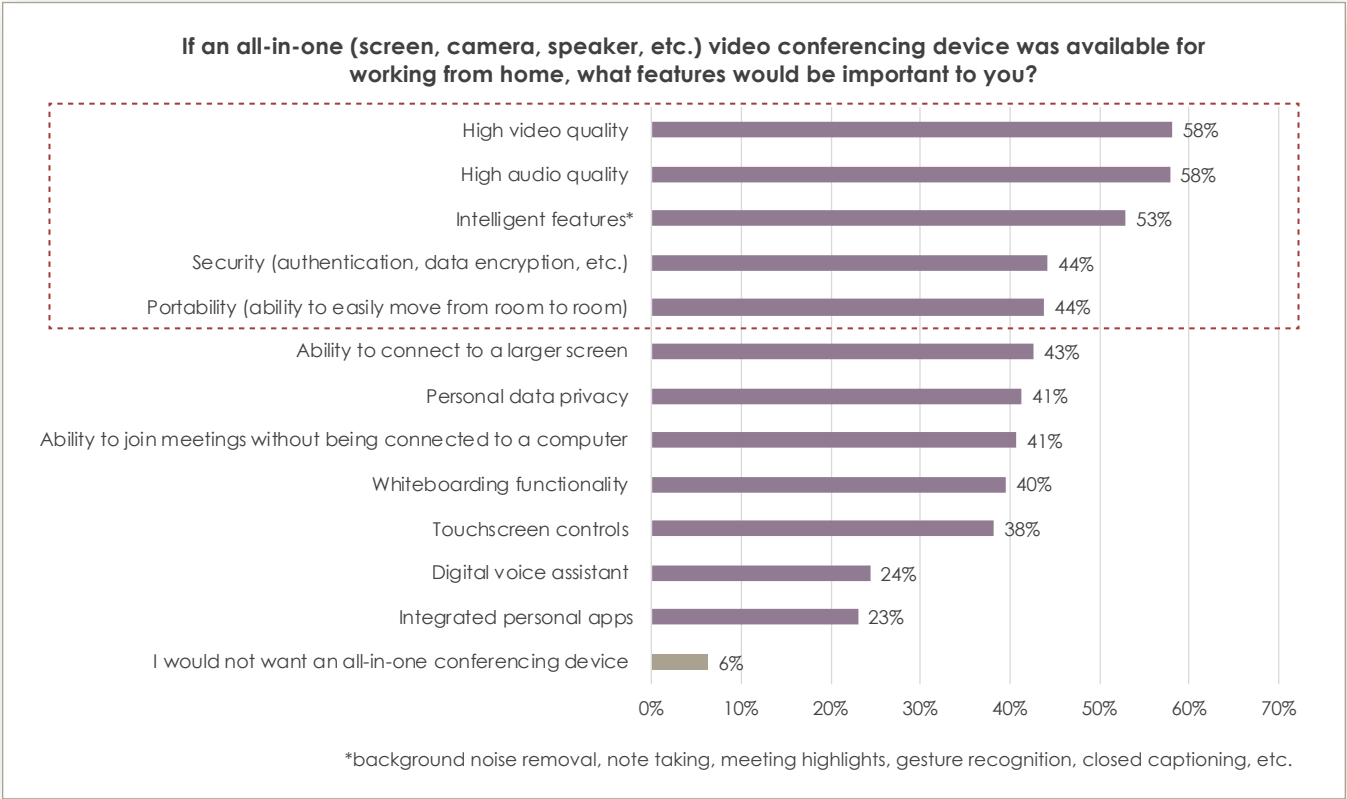
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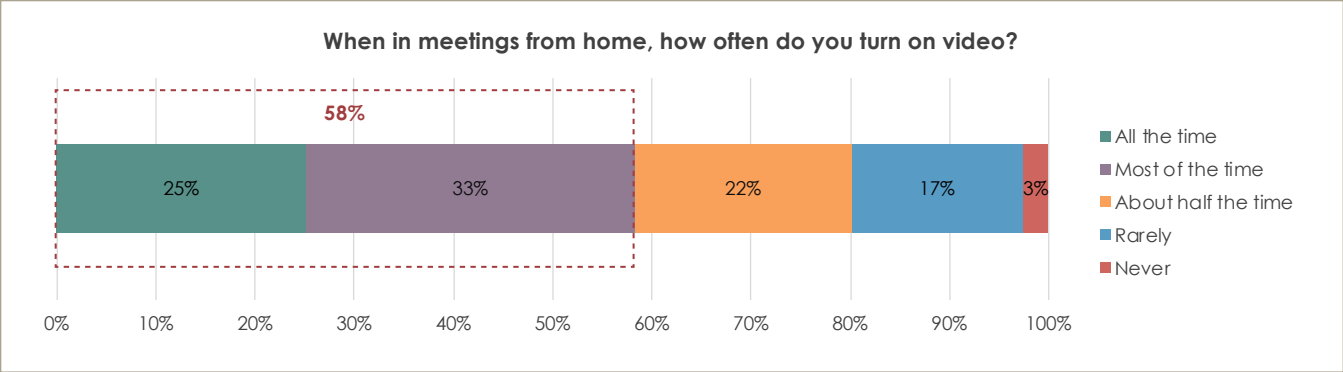
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Research participants were then asked specifically what features in an all-in-one device would be important to them, and high quality video and audio tied at the top at 58%. Next were intelligent features (53%) that provided background noise removal, digital assistance, automatic translations, and more. 44% wanted an easily portable device which directly corresponds with the earlier findings that home workers often move to different locations in their home. Several of the next features were nearly tied, with desires to connect to larger screens (43%), ensure privacy (41%), join meetings without needing a computer (41%), whiteboarding features (40%), and touch screen controls (38%).



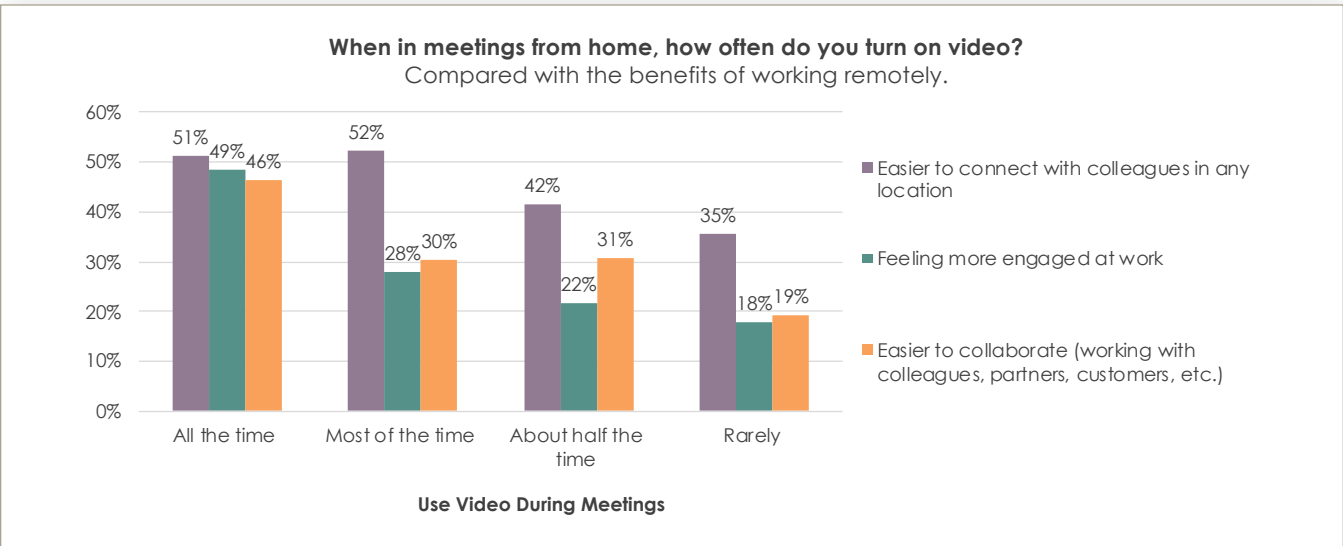
Just over Half Frequently Turn on Their Video During Meetings

The study also investigated the behaviors and habits of those that work from home. The research found that just 58% use their video “most of the time,” or “all the time.” One out of five, or 20%, “rarely” or “never” use video.



Use of Video Increases Collaboration, Connection, and Work Engagement

Deep analysis of the data has revealed a strong correlation between those that consistently use video and those that receive positive benefits. The chart below shows a few selected trends, noting that those who use video “all” or “most of the time” indicated they feel it is easier to connect with colleagues, compared to those who use video half or less of the time. A similar trend occurs for feeling engaged with work as well as finding it easier to collaborate with others. Thus, the frequent use of video serves to enhance positive benefits of remote working and reduces key detriments.



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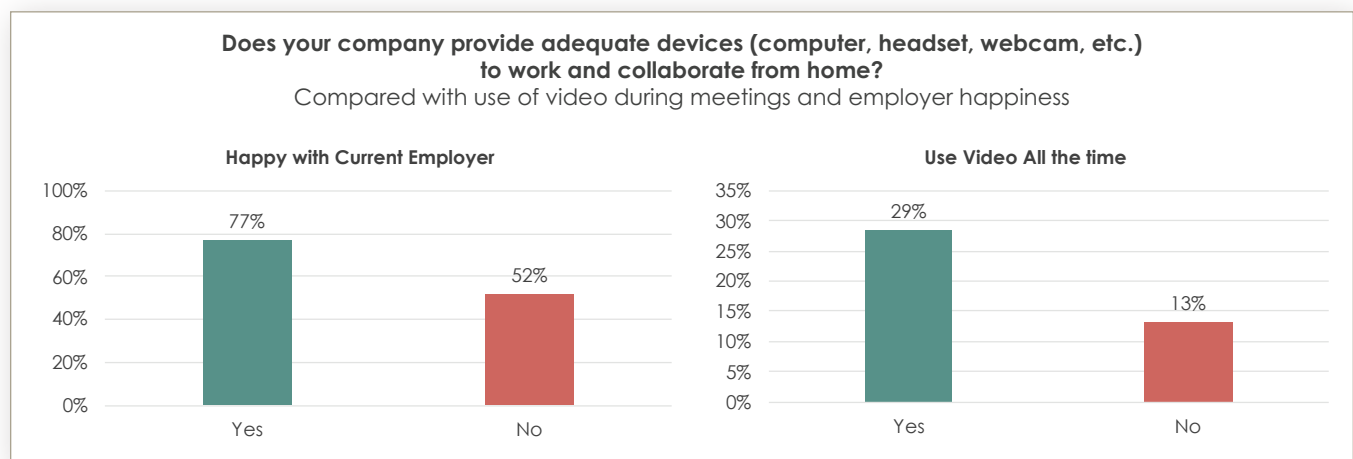
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Companies Need to Provide Proper Meeting Solutions

Given the very positive effects of those that use video frequently during meetings, the research looked for other correlations. Another such finding was that if the employer provided proper devices to their employees, they tended to use video “all the time,” twice as often as those who didn’t, thus improving benefits, morale, and productivity for the home worker. Employers who provided proper meeting devices garnered happier employees.



Conclusion

This research finds that employees working from home receive some very positive benefits but also some unhealthy effects and disturbing trends. If working from home was a short term situation this would be merely interesting but given this hybrid work model will continue, it is something employers should concern themselves with.

The findings clearly point to two areas of focus. The first is the adoption of new, improved, and smarter meeting and collaboration tools. These are needed to making meetings better, more interactive, and with fewer distractions caused by unwanted noise, poor video quality, and frustrations trying to collaborate. Companies should consider directly providing these tools, which not only increases productivity but results in workers being happier with their jobs.

The second course of action is to encourage the use of video during meetings. As found in this research, video helps employees feel more connected to colleagues and to the company. It also helps them collaborate and interact, as we know that words are less than half of what is delivered in conversations, and facial expressions convey much of a person’s meaning and thus the value of video.

In the ongoing transition to work-from-home employees and hybrid work, companies that thrive will be the ones that build a culture of inclusiveness to make working from home as much a benefit to the employer as the employee. That path requires the home workers to have the right collaboration solutions that not only enable them, but help them feel connected.

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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. 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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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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