Workplace of the Future: a global market research report

The workplace of the future offers mobility, bring-your-own device (BYOD) and innovative workspaces

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Over the past few years organizations across the globe have changed dramatically in response to the forces of globalization, economic uncertainty and consumerization of IT. These forces are fundamentally altering how businesses manage and operate. In this world, new ways to improve business productivity, flexibility and agility are no longer nice to have; they are essential for the workplace of the future.

Organizations that embrace the workplace of the future by supporting mobile workstyles will be far more agile than others. Mobile workstyles deliver organizations the flexibility to operate in a world that is hyper-connected and always on. Mobile workstyles enable people to strike a better work-life balance, able to work from anywhere, unrestricted by location, time or device.

In this world, work is something people do, not a place they go. Through mobile workstyles, work can be effortlessly shifted across people, locations, devices and time. It's also a shift in fundamental thinking. By completely eliminating the traditional hard-coding that exists between people, devices, applications and data, organizations increase flexibility, decrease costs and increase the speed of change.

The workplace of the future will be core to business strategy, where adopting the right technology and putting the right policies in place will be key to organizational success. Companies will build and protect amazing cultures that foster diversity, collaboration and innovation while supporting work-life balance and offering employees an element of choice in workplaces and devices.

This global market research report, which surveyed 1,900 senior IT decision makers, shows that organizations around the world are gaining huge operational and strategic advantages by embracing mobile workstyles to:

• Recruit and retain talent with cutting-edge policies for personal device usage and flexible work schedules

• Offer modern, flexible, and economical workspaces that inspire people while reducing overhead and real estate costs

• Increase personal productivity for people working anywhere by offering easy, yet secure, access to business resources

This research shows that a third of office workers will no longer be based at a traditional office; instead they will be operating from home, the field and project and customer locations, as well as from hotels, airports and trains. Individuals will access corporate applications, data and services from an average of six different computing devices a day. Workplaces will be redesigned to operate as flexible, collaborative hubs, helping organizations reduce their physical workspace by almost a fifth by

the end of 2020 and provide just two-thirds of an office desk for each employee. The Citrix Workplace of the Future report looks at how organizations are taking work to an entirely new place. Driven by employee demand, 91 percent of organizations worldwide are adopting mobile workstyles – and enabling people to work from anywhere.

Adoption and benefits of mobile workstyles

Mobile workstyles are already embraced by the majority and adoption continues to grow

A quarter (24 percent) of organizations surveyed have fully introduced mobile workstyles already, with a further 38 percent expanding their current deployment. An additional 21 percent plan to implement it within two years. The total number of organizations that have implemented mobile workstyles will rise from 24 percent in 2012, to 83 percent in 2014. That is a compound annual growth rate of 86 percent.

Only 9 percent of organizations do not have plans to adopt mobile workstyles.
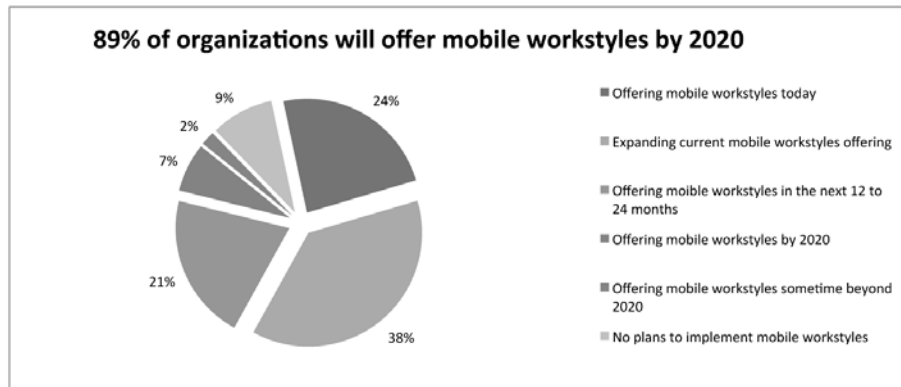

Figure 1: 89% of organizations will offer mobile workstyles by 2020.[1]

Organizations in the United States are adopting mobile workstyles the earliest, with 90 percent already providing or expanding mobile workstyles, followed closely by those in China (85 percent), Brazil (81 percent) and India (77 percent). In Europe, the UK (72 percent), France and Germany (both 71 percent) lead the adoption curve.

Flexibility, cost savings and employee attraction/retention lead corporate benefits

Organizations that have already adopted mobile workstyles have seen multiple benefits. Worldwide, 73 percent cited a more flexible, agile workforce as the primary benefit, followed by lower employee-related costs such as travel (53 percent) and real estate (48 percent) and the ability to attract (47 percent) and retain (44 percent) top talent.

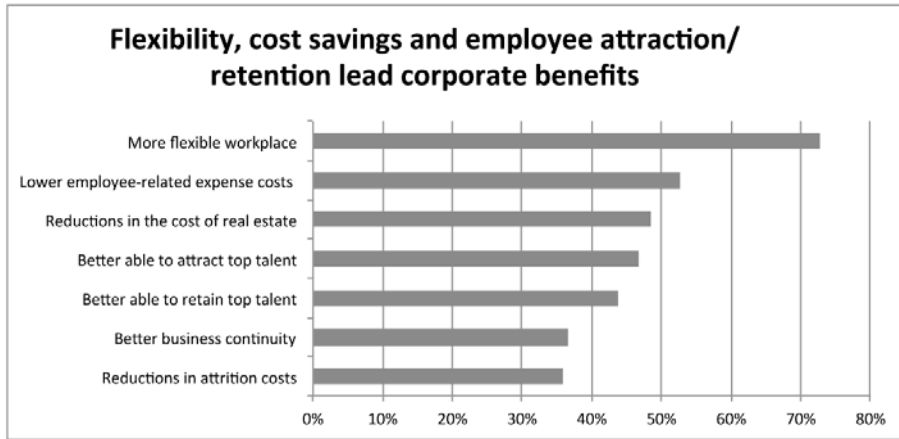[1] *Source: Citrix Workplace of the Future report 2012*

Flexibility, cost savings and employee attraction/ retention lead corporate benefits

Category	
More flexible workplace	
Lower employee-related expense costs	
Reductions in the cost of real estate	
Better able to attract top talent	
Better able to retain top talent	
Better business continuity	
Reductions in attrition costs	

0% 10% 20% 30% 40% 50% 60% 70% 80%

Figure 2: Flexibility, cost savings and employee attraction/retention lead corporate benefits.[2]

Flexibility, productivity and reduced commuting are top employee benefits

Organizations believe that workers see multiple benefits as a direct result of mobile workstyles strategies. Globally, the majority reported four specific advantages: increased flexibility, increased personal productivity, reduction in commuting time and better work/life balance. In contrast to corporate benefits, there were some profound differences in the perceived benefits for employees from country to country that can be attributed to geographical and cultural factors.

Reduction of commuting time is cited as the lead employee benefit in Europe, rating particularly high in Sweden, the Netherlands and Russia. Organizations in the Americas report increased personal productivity as the lead benefit, closely followed by employee flexibility. In Asia-Pacific, employee flexibility is considered the primary benefit, followed by personal productivity and a reduction in commuting time.
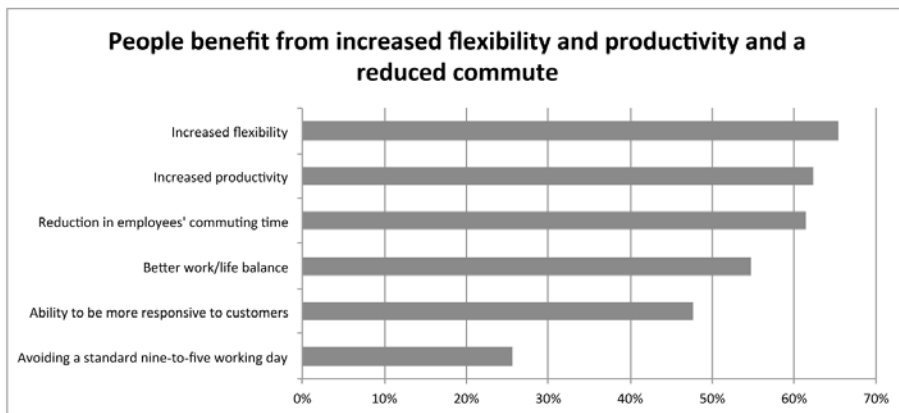
People benefit from increased flexibility and productivity and a reduced commute

Category	
Increased flexibility	
Increased productivity	
Reduction in employees' commuting time	
Better work/life balance	
Ability to be more responsive to customers	
Avoiding a standard nine-to-five working day	

0% 10% 20% 30% 40% 50% 60% 70%

Figure 3: People benefit from increased flexibility and productivity and a reduced commute.[2]

Widespread support for mobile workstyles

Organizations are adopting mobile workstyles for a number of reasons. Employee demand—either direct requests from workers or in response to employees simply using their personally owned devices for work activity—is certainly a key driver. However, organizations are also developing mobile workstyle strategies to address data security and business continuity requirements, as well as to lower costs. There is also direct pressure from senior management.
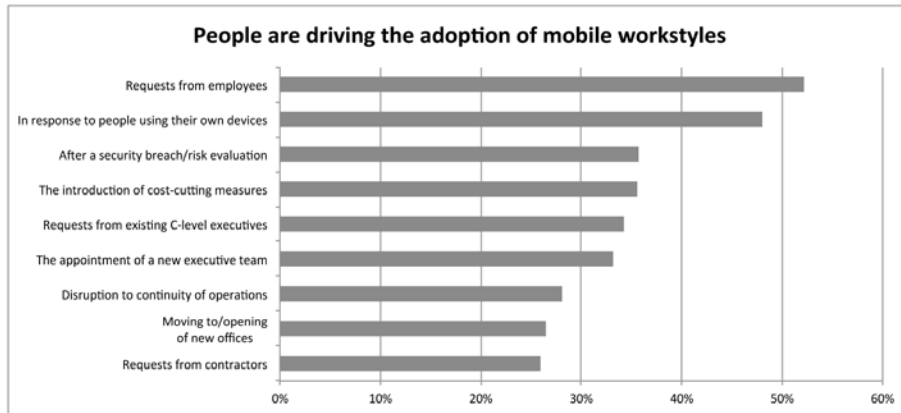

Figure 4: People are driving the adoption of mobile workstyles.[3]

Organizations in the Netherlands (69 percent) and Sweden (69 percent) have the highest numbers of employees desiring mobile workstyles. Those in China (74 percent), Hong Kong (61 percent) and Japan (61 percent) feel under the most pressure to implement mobile workstyles as a result of employees using their own devices within the workplace.

Organizations in China (59 percent) and India (51 percent) are the most likely to have introduced formal mobile workstyle programs as a way to address data security. The cost savings benefits of mobile workstyles are most appreciated in India (62 percent), South Korea (58 percent) and China (52 percent).

Mobile workstyles requires a broad technology solution

Organizations are relying on multiple, complementary technologies to manage mobile workstyles. Core technologies are focused on providing secure access to, and secure management of, business information. There is also a clear requirement for collaboration services to support a distributed workforce.
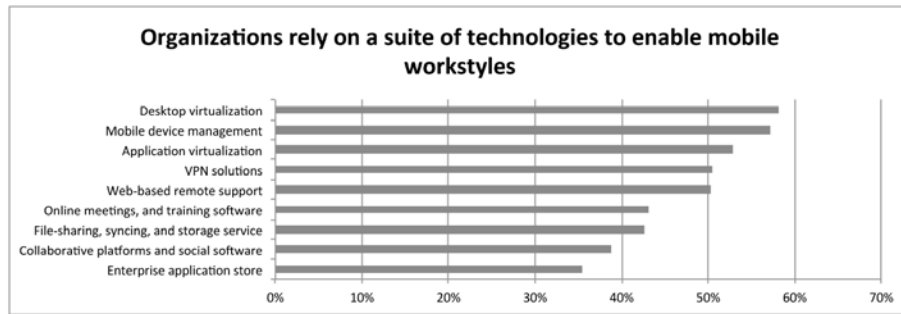
[3] *Source: Citrix Workplace of the Future report 2012*

Figure 5: Organizations rely on a suite of technologies to enable mobile workstyles.[4]

Effective policy must be carefully devised

There is no one size fits all policy for mobile workstyles. Each organization must involve multiple departments to create a policy that meets its specific needs.

One common requirement, however, is clear guidance on eligibility, which is cited by 65 percent of organizations. Beyond eligibility, organizations typically point to the need to establish a schedule of availability with core hours or particular days in the office. A change in people management practices and guidance in the use of appropriate technology are also important.
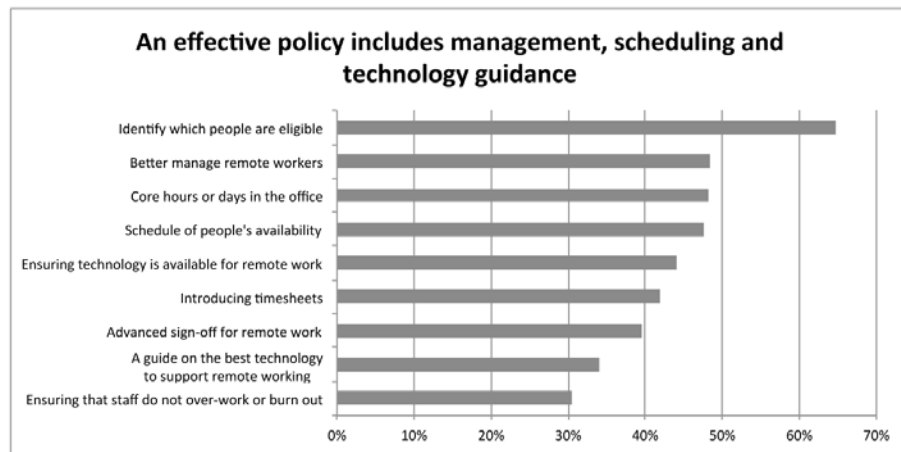

Figure 6: An effective policy includes management, scheduling and technology guidance.[4]

Redesigning the workplace
A third of knowledge workers will not visit the office

Organizations that have already implemented or plan to implement mobile workstyles predict that almost a third (29 percent) of their people will no longer access corporate applications, data and services from the local office.

The reduction in workspace required is likely to be even larger. Of the 71 percent of workers that will still visit the office regularly, most are unlikely to work a full five-day week there. They will also work from home (64 percent), followed by various semi-permanent locations including company project sites (64 percent), other company workspaces (58 percent) and customer/partner/event sites (50 percent).

People are also expected to access corporate applications, data and services while mobile from locations such as hotels, airports, coffee shops and while in transit.
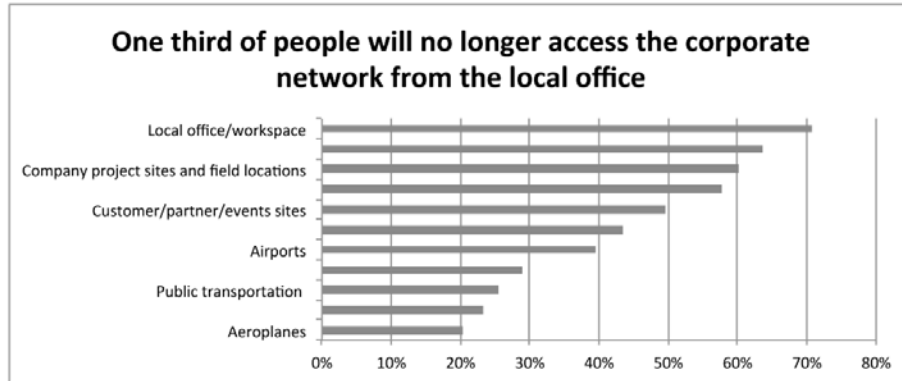

Figure 7: One third of people will no longer access the corporate network from the local office.[5]

Percentage of workforce not expected to work from the local workplace or office

Region	Global percentage of workforce not expected to work from their local office	Regional percentage of workforce not expected to work from their local office	Country with the highest proportion of people not expected to work from their local office	Country with the smallest proportion of people not expected to work from their local office
Americas	29 percent	29 percent	USA – 35 percent	Brazil – 23 percent
Asia Pacific	29 percent	33 percent	Japan – 60 percent	Taiwan - 4 percent
Europe	29 percent	27 percent	Russia – 68 percent	Sweden – 7 percent

Corporate real estate will be redesigned to inspire the workforce

Almost all respondents (96 percent) say they are improving their real estate design. The majority are looking at four improvements: creating a more collaborative and inspiring workspace (64 percent), supporting flexible workplaces (61 percent), offering better utilization of space (55 percent) and introducing the latest technology to the workplace (55 percent).

[5] *Source: Citrix Workplace of the Future report 2012*

The order in which the top four answers are given is consistent around the world. The modern office will be designed as a creative, inspiring and pleasurable environment.
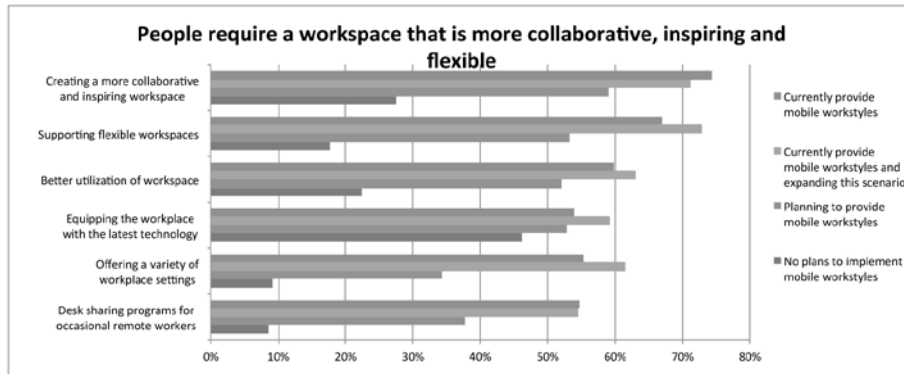

Figure 8: People require a workspace that is more collaborative, inspiring and flexible.[6]

Reduction in the real estate footprint

As the adoption of mobile workstyles increases, the amount of corporate real estate is shrinking. Organizations with a mobile workstyles strategy in place predict a decrease in overall office space of 17 percent by the end of 2020.

There could be a number of reasons for an overall reduction in real estate. However, organizations that have implemented mobile workstyles have 15 percent fewer desks per knowledge worker than those who have not.

To distinguish between office-based workers and those at fixed locations—such as workers on the factory floor or at supermarket checkouts—organizations were asked how many desks they had for every 10 knowledge workers in 2010 and their prediction for 2020.

Globally, the expectation is that the number of desks will drop from 7.96 per 10 knowledge workers in 2010 to 7.08 by 2020.

Organizations in the United States currently have the fewest desks (6.77 desks per 10 knowledge workers). By 2020, they will provide just 6.14 desks per 10 knowledge workers. However, by that date organizations in Singapore will have the fewest desks in the world, at just 6.09 per 10 knowledge workers.

In Europe, Sweden (8.79) and the Netherlands (8.41) currently have the greatest number of desks per 10 knowledge workers. By 2020 the Netherlands (6.11) and the UK (6.26) will have the fewest desks per 10 knowledge workers, having dropped by 27 percent and 21 percent, respectively, since 2010 – the biggest drops in Europe.

In Asia-Pacific, Thailand (9.31) and Taiwan (9.04) currently have the largest number of desks for every 10 knowledge workers. By 2020, as noted, Singapore (6.09) and Australia (6.69) will have the fewest. The most dramatic drop in the ratio of desks to knowledge workers will be in Taiwan (19 percent) and Singapore (17 percent).

[6] *Source: Citrix Workplace of the Future report 2012*

Japan is the only one of the 19 countries covered in the research that forecasts a rise in the ratio of desks to knowledge workers, from 7.59 in 2010 to 8.77 in 2020.
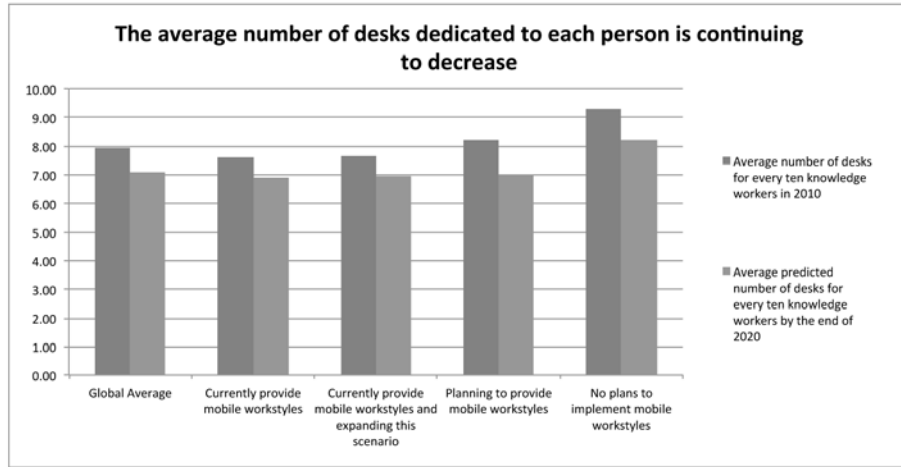

Figure 9: The average number of desks dedicated to each person is continuing to decrease.[7]

People are using multiple devices to access company data

The number of computing devices such as desktops, laptops, notebooks, netbooks, ultrabooks, smartphones and tablets—a worker uses has grown significantly in recent years.

The current average number of devices connecting to the corporate network is 5.18 per knowledge worker—4.43 devices across all workers—and predicted to rise to almost six devices by 2020. The number of devices used by each worker in organizations that already support mobile workstyles is typically double that of
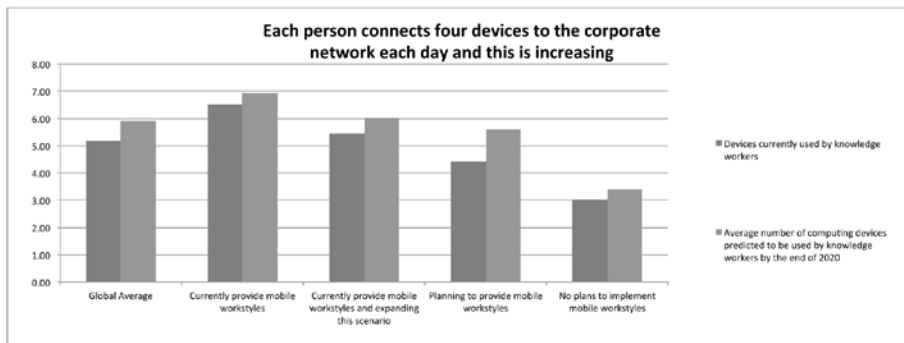

Figure 10: Each person connects four devices to the corporate network each day and this is increasing[7]

BYOD policies and best practices

Corporate attitudes toward the use of personal devices in the workplace have changed markedly because of the relentless demand from employees, including senior executives, who use their personal devices for work. Currently, two-thirds of organizations do not have an enforced ban on people's use of their own devices for work, although 84 percent have had such a ban in place in the past.

Bans on personal device usage are regarded, universally, as difficult to enforce, therefore rendering them ineffective. Only 14 percent of organizations worldwide claimed to have had no problems enacting and enforcing such a ban.

These figures suggest that, in the majority of cases, organizations initially responded with a complete ban when they realized that user-owned devices were being used for business purposes. However, as organizations increasingly understood the pressure to consumerize IT, these bans were lifted and bring- your-own-device (BYOD) policies were put in place to benefit and protect the organization.

The research firmly points to the fact that people rather than organizations are driving these changes. Regardless of attempts to ban employees from using their own devices, determined people often find workarounds. This situation is acknowledged by senior IT directors. Fifty five percent say they will actively accommodate and encourage the use of personal devices for work purposes. If organizations do not embrace the consumerization of IT and adopt BYOD polices, they risk leaving enterprise information unprotected and vulnerable when employees find ways to use their personal devices for work tasks.

BYOD policies are driven by demand for greater productivity, mobility and flexibility

There are many reasons why organizations are adopting BYOD polices. Worker demand for increased productivity and mobility is a clear source of pressure, expressed as requests from employees as well as a push from C-level executives. By embracing the consumerization of IT, organizations retain staff and get more control around security of user-owned devices.

Globally, 37 percent of organizations reported a financial reason as motivation for adopting a BYOD policy. The use of personal devices allows organizations to shift costs of hardware procurement, configuration and support to employees.
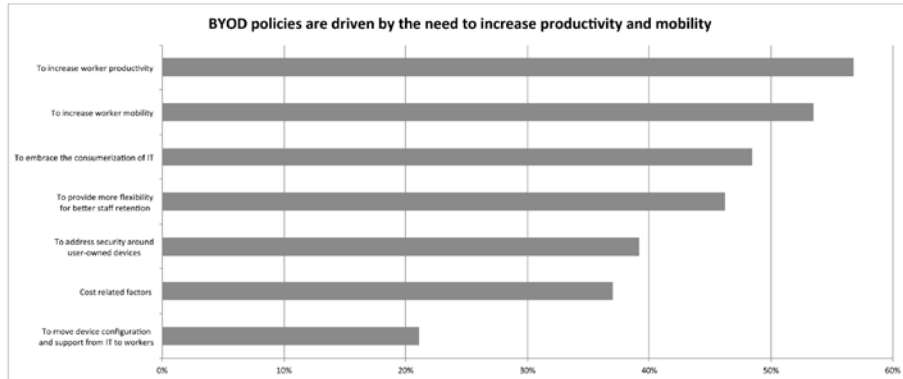
Figure 11: BYOD policies are driven by the need to increase productivity and mobility.[8]

Multiple departments and people contribute to BYOD policies

Organizations report that multiple stakeholders are involved in the formulation of their formal BYOD policy. With an average of three groups participating in its development, BYOD is clearly not an entirely IT-centric initiative. It is a business initiative and requires cross-departmental involvement and collaboration to be truly successful.
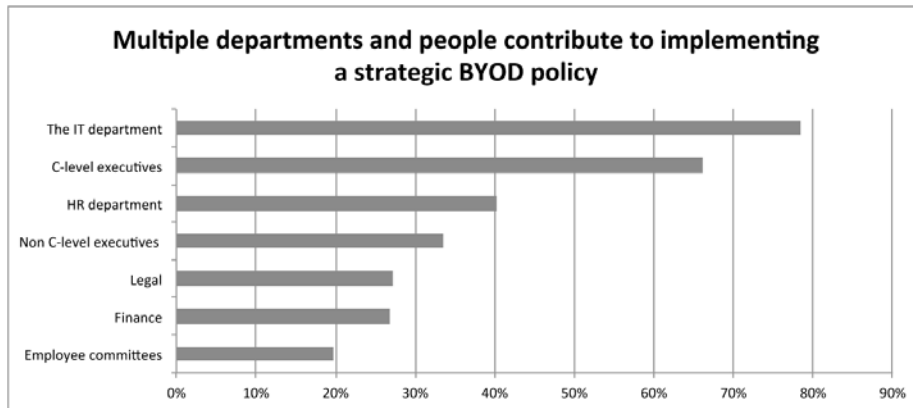

Figure 12: Multiple departments and people contribute to implementing a strategic BYOD policy.[8]

Although the IT department is likely to be involved in creation of BYOD policy, as well as program deployment and support, 22 percent of organizations indicate that IT does not play a role in BYOD policy.

[8] *Source: Citrix Workplace of the Future report 2012*

BYOD policies are complex and wide-ranging

BYOD policies have to be developed carefully by each organization. They need to simultaneously empower people, make the organization more agile and protect the organization and its business information.

BYOD policies frequently set forth rules for management of documents (57 percent), storage of confidential data (53 percent), acceptable use of personal devices (52 percent) and antivirus responsibility (50 percent). How to handle lost or stolen devices (43 percent), along with maintenance responsibilities (13 percent) and the establishment of minimum technical requirements (38 percent) are also regularly considered.

Effective policy can only be supported by suitable technology, underlining its importance in enabling BYOD.
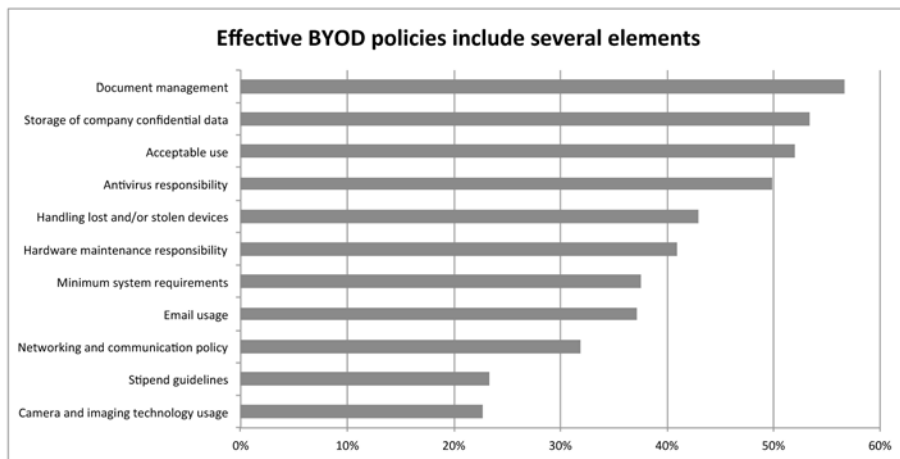

Effective BYOD policies include several elements

Figure 13: Effective BYOD policies include several elements.[9]

Security is the primary concern for BYOD policy to address

The difficulties faced when introducing a BYOD policy are consistent worldwide. Concerns about information security rank highest (58 percent), followed by worries that people do not understand the risks of using their own devices to access business information (50 percent). Challenges experienced when addressing compliance and data privacy standards (44 percent) and managing data on mobile devices (40 percent) were also identified.

It is apparent that BYOD requires faith in workers' adherence to BYOD policy and their attitudes to organizational information—yet the responses highlight concern about whether workers know how to do the right thing. A comprehensive BYOD initiative, therefore, needs a centralized approach to managing information security.

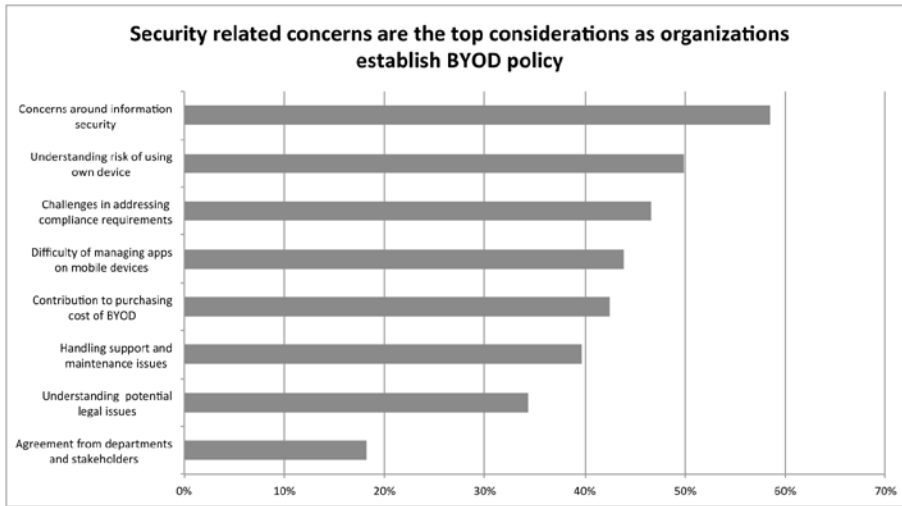[9] *Source: Citrix Workplace of the Future report 2012*

Figure 14: Security related concerns are the top considerations as organizations establish BYOD policy.[10]

Organizations need to proactively manage device access to limit security risk

The vast majority (97 percent) of organizations indicate they restrict personal device access to business information based on the worker's job role, the device used or how it is configured, the type of network being used by the device to access the information and the location of the device.

Once again, without the right technology solution to support BYOD, such policies either become impossible to enforce or too sluggish and locked down to deliver the benefits.
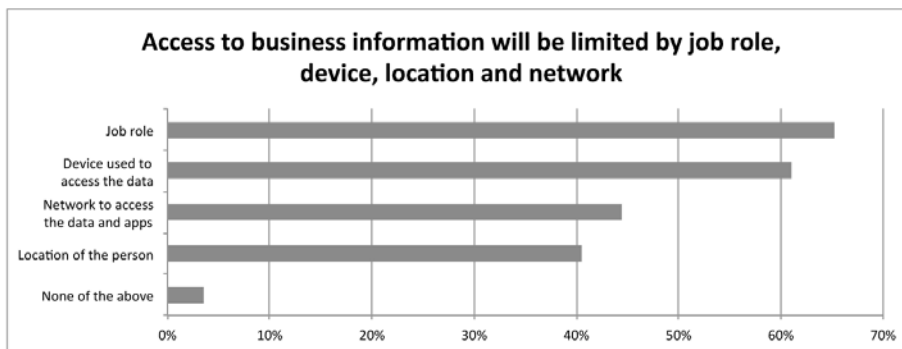

Figure 15: Access to business information will be limited by job role, device, location and network.[10]

[10] *Source: Citrix Workplace of the Future report 2012*

Organizations contribute to the purchase of the vast majority of BYOD devices

The vast majority of organizations with a BYOD policy already in place or planned said they compensate employees who use their own devices for work purposes, either in part or in full. Organizations recognize that providing compensation gives them some control. A global majority of 61 percent reported this as the main reason they gave workers a stipend or financial contribution.

Japan (89 percent), South Korea (89 percent), Brazil (88 percent), Hong Kong (85 percent), the United States (85 percent), Germany (83 percent) and Australia (82 percent) lead in the payment of full or partial compensation for BYO devices.

Organizations in Brazil (59 percent), the United States (57 percent), Germany (56 percent) and Australia (48 percent) lead in the payment of a full stipend.

Even in the countries least likely to contribute to an employee's purchase of their own device, over half of the organizations in the Netherlands (55 percent), the UK (61 percent), Canada (64 percent) and Sweden (64 percent) have a compensation scheme in place.

The research also reveals that compensations towards device purchase will increase further over the next two years as more businesses adopt a formal BYOD policy.
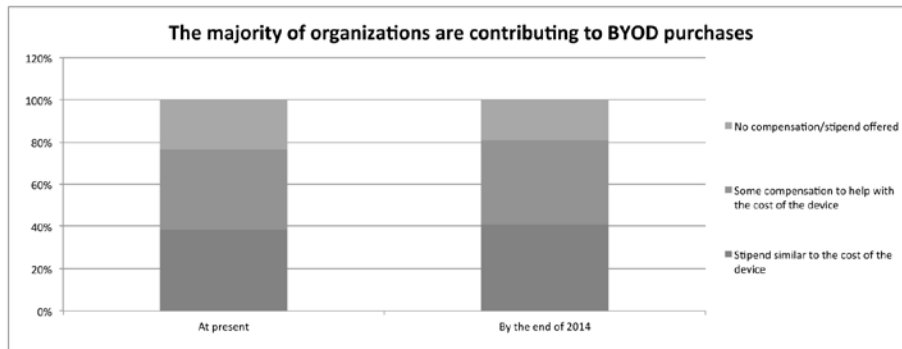

Figure 16: The majority of organizations are contributing to BYOD purchases[11]

Organizations have to support multiple platforms

The majority of organizations with a BYOD policy are supporting at least two device platforms. Globally, 70 percent of organizations said they support Android®, 60 percent support Apple® iOS®, 44 percent Microsoft® Windows® and 39 percent BlackBerry®.
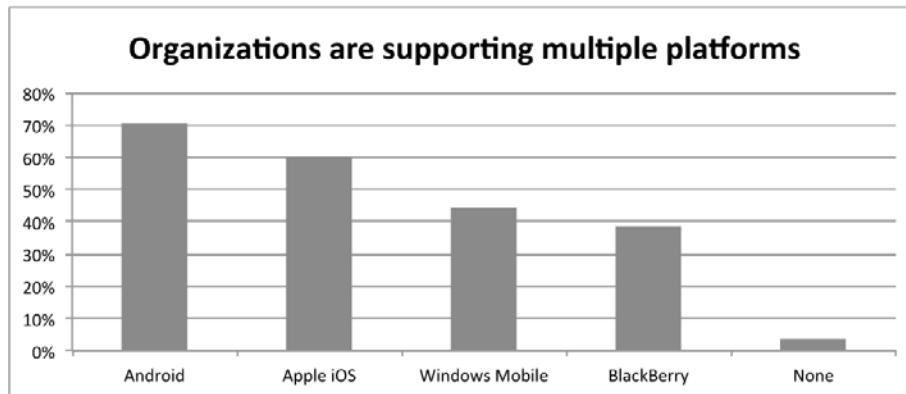
[11] *Source: Citrix Workplace of the Future report 2012*

Organizations are supporting multiple platforms

Figure 17: Organizations are supporting multiple platforms[12]

Android is the most widely supported platform in all 19 countries, with the exceptions of:

- Australia (72 percent of organizations are supporting iOS versus 63 percent for Android)

- Canada (where Android comes behind iOS at 71 percent and BlackBerry at 61 percent)

- China (where Windows is supported by 91 percent of organizations in contrast to 89 percent for Android)

- The United States (87 percent supporting iOS against 68 percent for Android)

Organizations manage corporate information on devices when employees leave

Most organizations (97 percent) that offer, or plan to offer, BYOD programs have an approach in place to handle user privileges associated with a device owned by someone who leaves the organization. However, the research shows that there are multiple approaches to ensure the security of sensitive information.

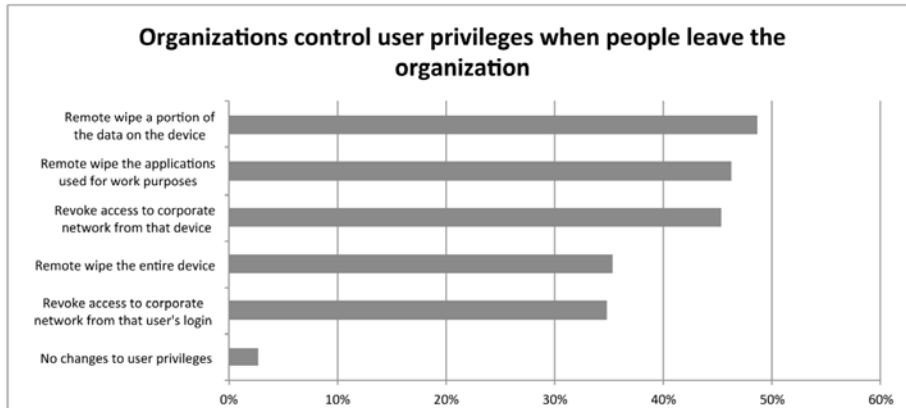[12] *Source: Citrix Workplace of the Future report 2012*

Figure 18: Organizations control user privileges when people leave the organization[13]

Conclusion

Mobile workstyles are here, growing fast and need thoughtful management

The traditional office, where people sit statically at dedicated desks working a 9-5 routine, is rapidly being transformed into a highly mobile workplace of the future. People will work outside the traditional office in places they choose and places where they need to be to do work. Organizations anticipate that, as a result of mobile workstyles, a third of their people will no longer access corporate applications, data and services from the local workplace or office. Workplaces—with fewer dedicated desks, forecast to be almost a fifth smaller—will be redesigned to provide inspiration and encourage collaboration.

A quarter of organizations have already fully adopted mobile workstyles, and this number is expected to rise to 83 percent by the middle of 2014. Organizations are adopting mobile workstyles because they benefit from a more flexible, agile workforce, lower employee-related and real estate costs and the ability to attract and retain top talent. In line with this expectation, organizations are planning to provide just seven desks for every 10 knowledge workers and predict a decrease in overall office workspace of 17 percent by the end of 2020.

Employees enjoy more flexibility, increased personal productivity, less commuting and a better work-life balance. As they benefit both organizations and employees, mobile workstyles are receiving widespread support. However, organizations are paying careful attention to policies for work anywhere programs, particularly such practicalities as the availability of employees within certain time parameters.

The emergence of BYOD initiatives means that people already use multiple computing devices to connect to the corporate network on a daily basis. The majority of these devices will be chosen and purchased by employees, who typically will be reimbursed—fully or partially—by the organization.

[13] *Source: Citrix Workplace of the Future report 2012*

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With a highly mobile workforce, organizations have to ensure business information is available when and where it is needed, while protecting sensitive data. People will access business information from more locations than ever before using a wide range of devices that operate on different platforms. Citrix will continue to provide organizations around the globe with expertise, infrastructure and services that enable full productivity beyond the constraints of traditional offices and work hours to create the workplace of the future.

Related Links

• Whitepaper: The Top 10 Reasons to Embrace Workshifting

• Whitepaper: Workshifting: How IT is Changing the Way Business is Done

• Whitepaper: Desktop Virtualization: The key to embracing the consumerization of IT

• Whitepaper: Best practices to make BYOD simple and secure

Research Note

The research presented in this white paper was commissioned by Citrix and conducted by Vanson Bourne, an independent market research company. A representative sample of 1,900 senior IT decision makers from 19 countries across the globe was polled in August 2012. Three-quarters of respondents were from organizations of more than 1,000 employees; the remainder were from organizations of 500 – 999.

The 19 countries included in the research are: Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Japan, Malaysia, Russia, Singapore, South Korea, Sweden, Taiwan, Thailand, the Netherlands, the United Kingdom and the United States.

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