

Future Workforce Study

Germany | 2016



Germany findings overview

The majority of German employees are happy in their jobs, with remote workers reporting the highest levels of happiness. Germans consider their relationships with colleagues to be the most significant aspect of their jobs, valuing company culture considerably more than salary.

Communicating in person is preferred in German workplaces, with these interactions considered key to effective collaboration and productivity. **German employees also claim to be most productive when working in an office.** However, they do appreciate flexibility and the freedom to choose where they work, which allows them to feel healthier and more focused.

The large majority of employees in Germany are satisfied with their workplace technology, however, they still rely on traditional office equipment like desktop PCs and landlines. One fifth of German workers say they would likely quit a job that doesn't provide the technology they need.

Smart workplaces are seen as exciting, but not necessarily expected in Germany in the near future.



Key Findings



1

Germans are overwhelmingly happy in their jobs, remote employees are even happier than average.

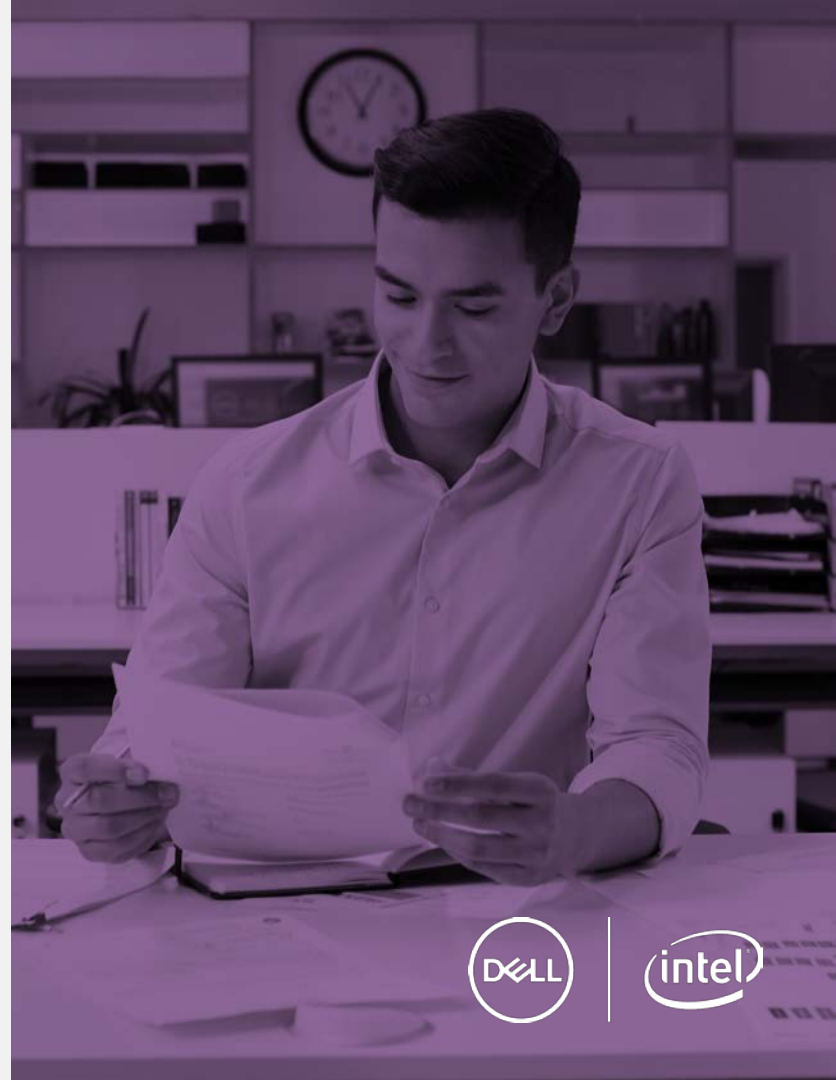
89%

The majority of German employees (89%) are happy in their jobs. For one third of employees (33%) the relationship with their colleagues is the most satisfying part of their work followed by the subject matter of work (26%).



Salary (35%) and career growth opportunities (21%) are factors with the most impact to create dissatisfaction at work.

German employees want to keep their work and personal lives separate, with **69% saying that life begins at the end of a work day only.**



2

Communications at work in Germany is all about face to face interactions.

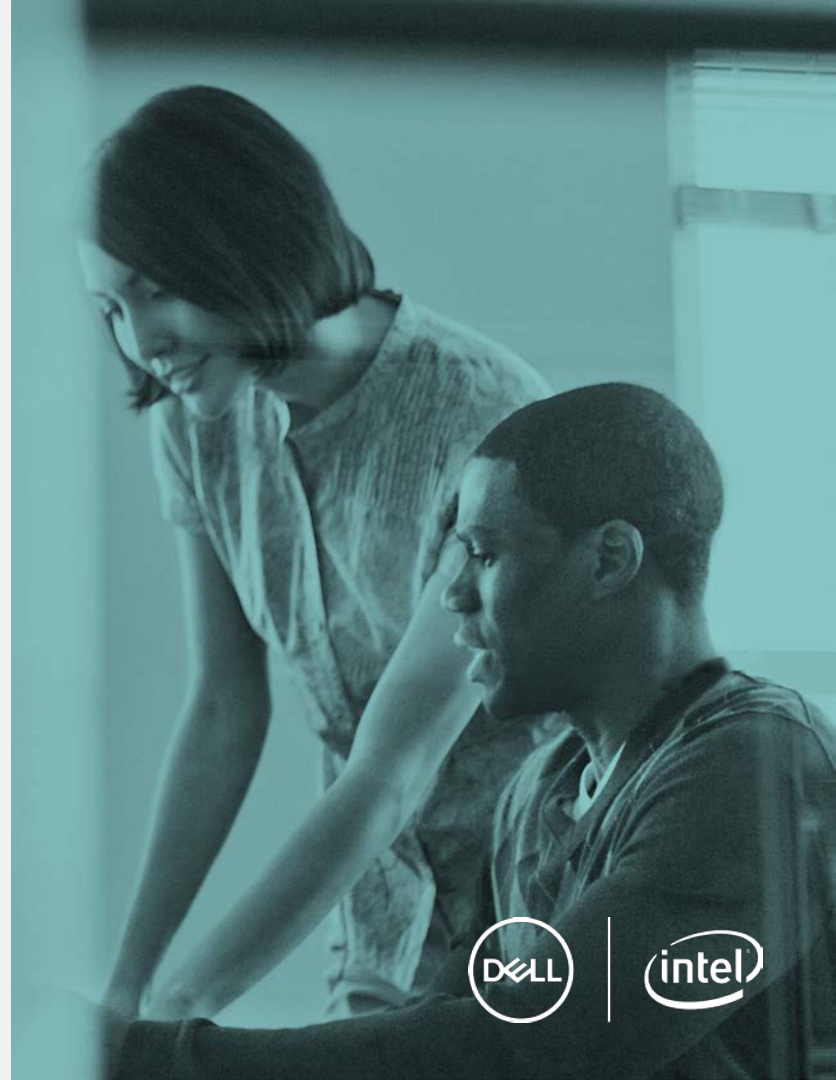
72%

A large majority (72%) of Germans prefer face to face communications with colleagues over remote conversations. Nearly three quarters (74%) say good relationships are key to collaboration, while only 9% say the same of technology.



In-person interactions are a necessary fact of productive work for 88% of German employees.

Germans **don't think that face to face communications will become obsolete in the future (51%).**



3

Germans do their best work at office desks.

53%

While appreciating the flexibility of choosing a workspace, German employees still do their best work at office desks (53%). The flexibility to choose their workspace allows 37% of German employees to concentrate better.



Keeping work and personal lives separate (34%) and **maintaining personal relationships with colleagues (33%)** are the biggest concerns of Germans who are working remotely.



4

The large majority of employees in Germany is satisfied with their workspace technology.



80%

More than 80% of German employees are satisfied with workplace technology. 20% of the German workforce would be likely to quit a job that doesn't provide the technology they need. Young workers are by far more likely to quit a job because of substandard tech (31% vs. 15%).



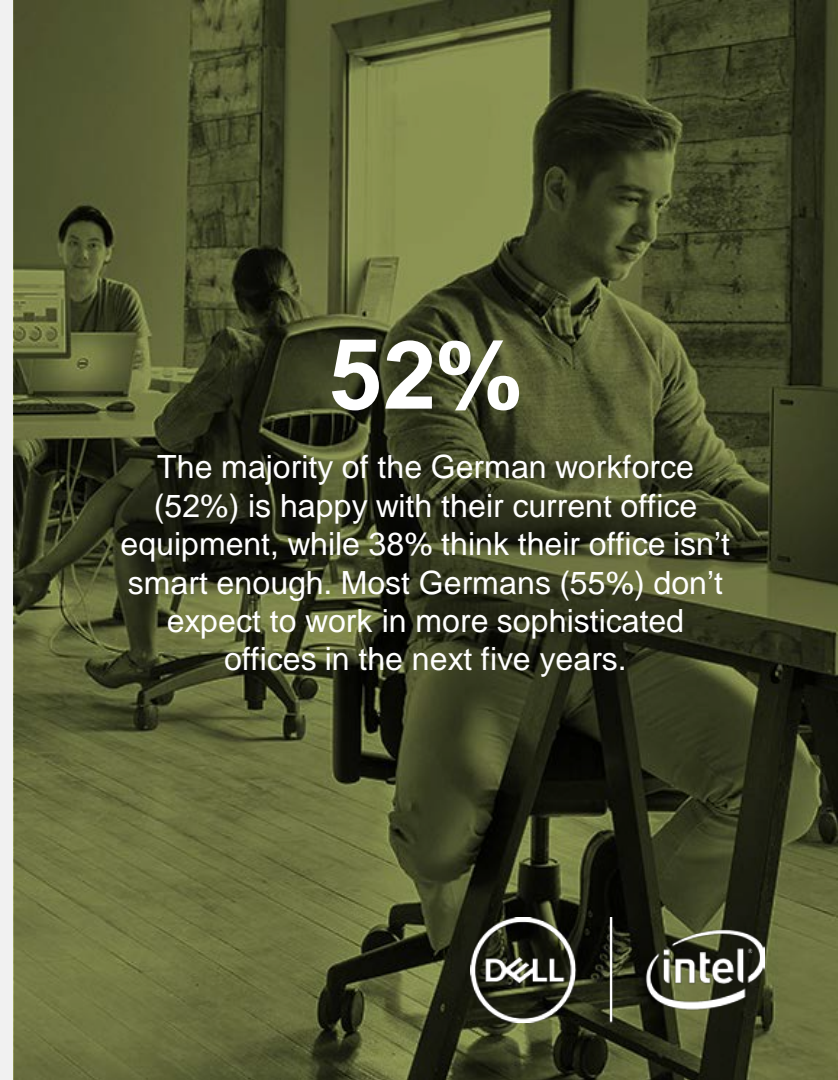
A worker's home technology often is **more cutting-edge than workplace technology (50%)**.

Interestingly, Germans still rely on traditional office products like **landlines (used by 77%)** and desktop **PCs (71%)**.



5

Smart workspaces are exciting, but not necessarily expected in the near future.



52%

The majority of the German workforce (52%) is happy with their current office equipment, while 38% think their office isn't smart enough. Most Germans (55%) don't expect to work in more sophisticated offices in the next five years.



Around half of remote employees **expect to be working in a smart office in the near future**, far more than most Germans.

Nonetheless, future tech is expected to increase productivity. Germans particularly count on **faster internet and on cutting edge devices (both 63%)**.



Key Supporting Slides



1

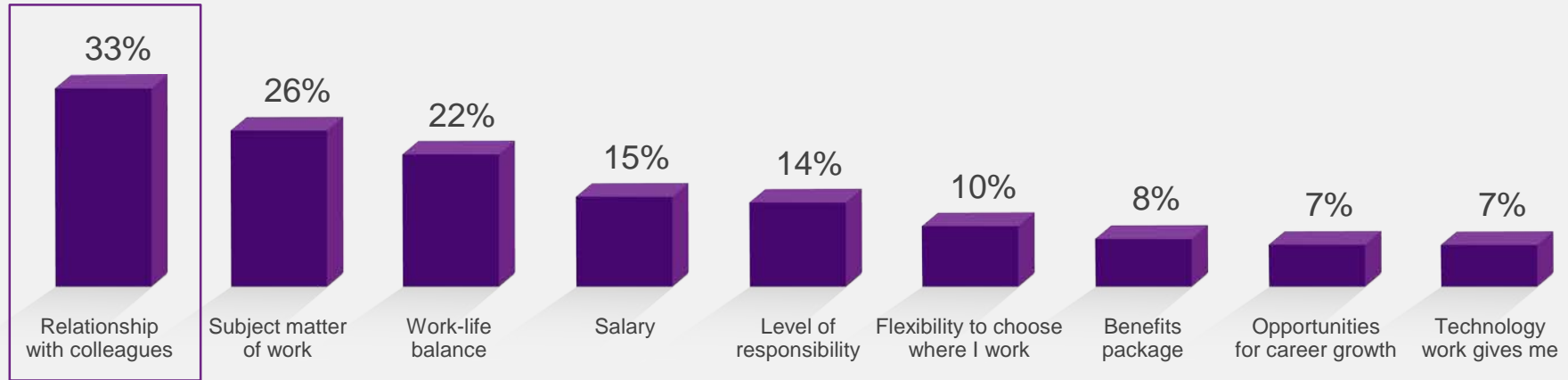
Germans are overwhelmingly happy in their jobs, remote employees are even happier than average.



One third of Germans pick their relationships with colleagues as the most satisfying part of their work

While more concrete benefits — like salary, benefits and technology — are less frequently ranked as areas of satisfaction.

Please indicate which two aspects of your job you are most satisfied with.



33% say they are most satisfied with their relationship with colleagues

*33% say they are most satisfied with their relationship with colleagues



EMEA trends on job satisfaction align with Germany

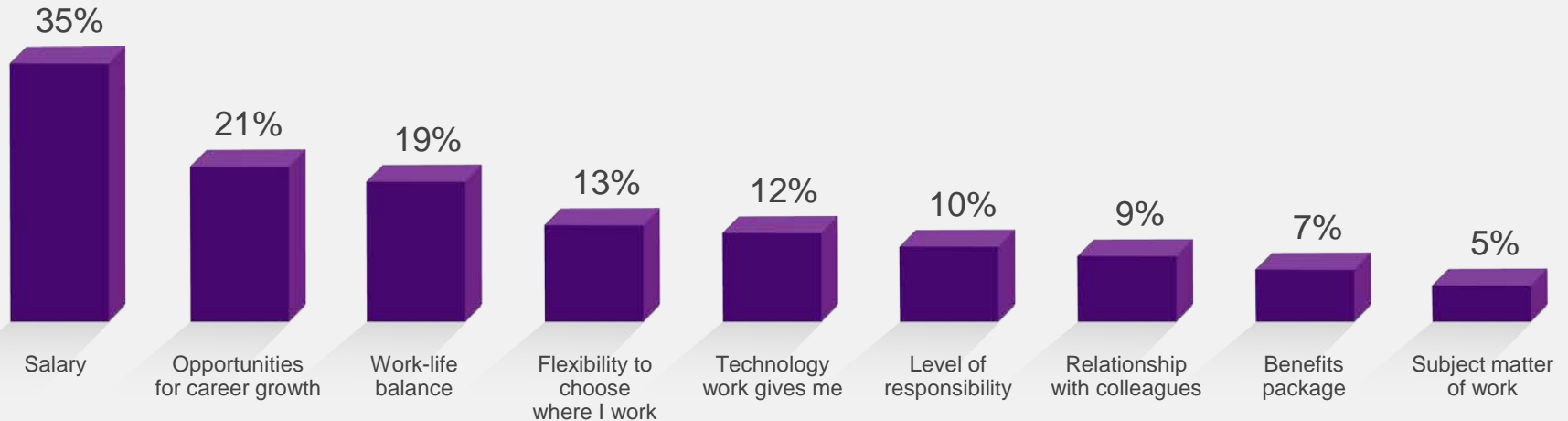
Please indicate which two aspects of your job you are most satisfied with.

	UK	FR	DE	ZA
My relationship with my colleagues	34	26	33	31
The subject matter of my work	31	24	26	28
My work-life balance	28	26	22	21
My salary	15	20	15	12
My level of responsibility	14	20	14	20
The flexibility I have to choose where I work	11	11	10	16
My benefits package	8	12	8	15
The opportunities for career growth	7	10	7	15
The technology my work provides me (e.g. devices, software, cloud storage, etc.)	8	16	7	19



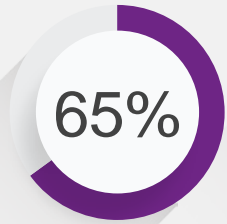
While more tangible job-related issues rise to the top of causes of dissatisfaction — especially salary

Please indicate which two aspects of your job you are least satisfied with.

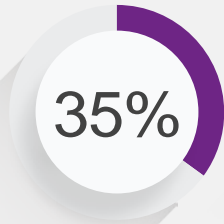


German employees want to keep their work and personal lives separate

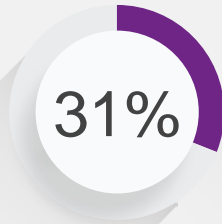
Which of the following is closer to your view?



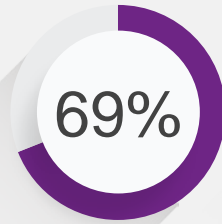
My job is a core part of my personal identity



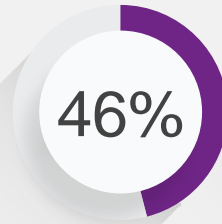
My job is just something I do to pay bills



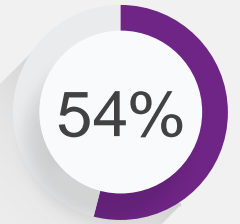
Work is life



Life begins at the end of the work day



Work is a key part of my social life



My work life and social life are mostly separate



For the most part, EMEA employees want to keep their work and social lives separate

Please indicate which two aspects of your job you are most satisfied with.

	UK	FR	DE	ZK
My job is a core part of my personal identity	52	69	65	50
My job is just something I do to pay the bills	48	31	35	50
Work is life	30	54	31	44
Life begins at the end of the work day	70	46	69	56
Work is a key part of my social life	20	46	46	18
My work life and social life are mostly separate	80	54	54	82

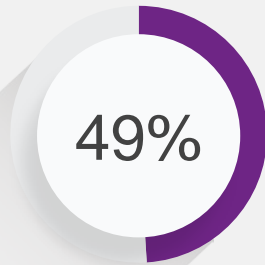


Half of Germans say their peers are happy in their careers

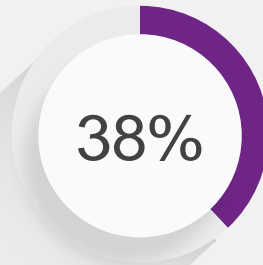
However, while 92% of Millennials say they're happy at their jobs, 40% say others their age aren't satisfied.

Which of the following is closer to your view?

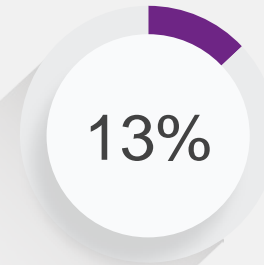
Most people you know your age are...



Happy in their careers



Dissatisfied in their careers



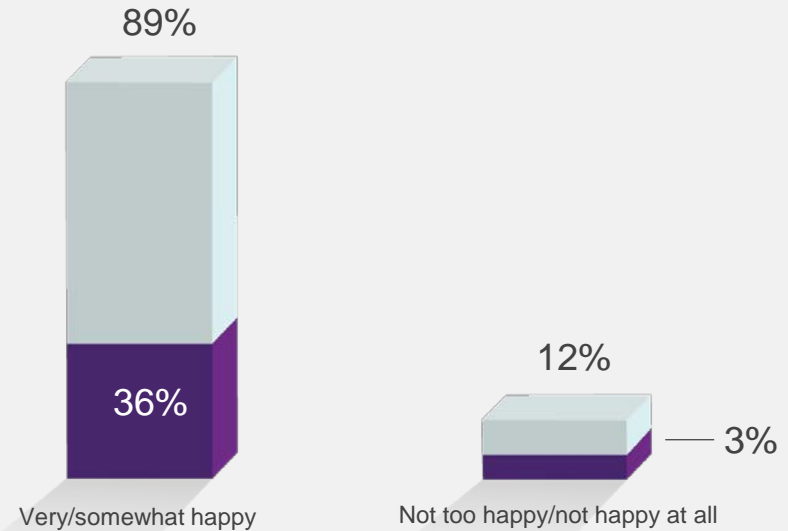
Don't know



Germans are overwhelmingly happy in their jobs, remote employees are even happier than average

When thinking about your job, would you describe yourself as...?

Happiest DE Professionals:
Remote Employees – 94%



*Darker colors indicate stronger intensity of answer



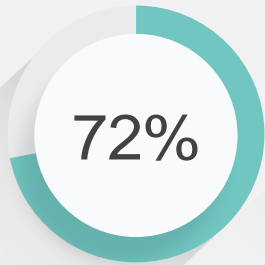
2

Communications at work in Germany is all about face to face interactions.

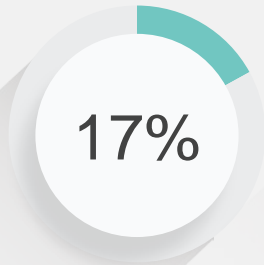


Communications at work in Germany is all about face to face interactions

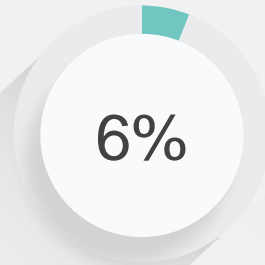
And would you rather exchange conversation with a colleague face to face or remotely?



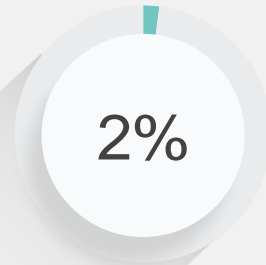
Face to face



No preference



Remotely via phone



Remotely via video



Communications at work in Germany is all about face to face interactions

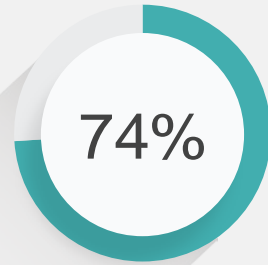
And would you rather exchange conversation with a colleague face to face or remotely?

	UK	FR	DE	ZA
Face to face	64%	64%	72%	48%
Phone	7%	8%	6%	12%
Video	3%	5%	2%	4%
No preference	22%	24%	17%	36%

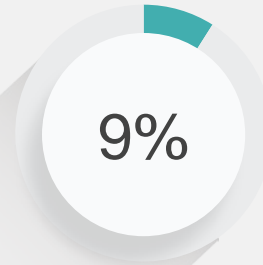


Nearly three quarters say good relationships are key to collaboration — while only 1 in 10 say the same of technology

Which of the following plays the biggest role in making it easier to collaborate with your colleagues?



A good working relationship
with my colleagues



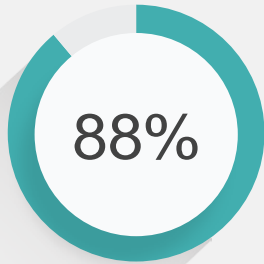
Technology to communicate
with my colleagues

*3% of Respondents said "Don't know"

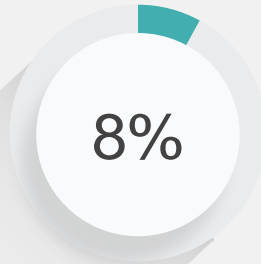


The vast majority of German employees say in-person interactions are a necessary fact of productive work

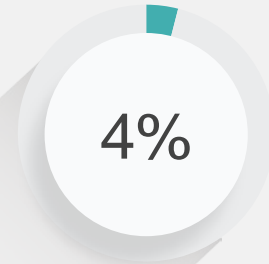
Which of the following is closer to your view?



In-person interactions with colleagues are **necessary** to foster a productive and professional work environment



In-person interactions with colleagues at work are **unnecessary and inefficient**



Don't know



The vast majority of German employees say in-person interactions are a necessary fact of productive work

Which of the following is closer to your view?

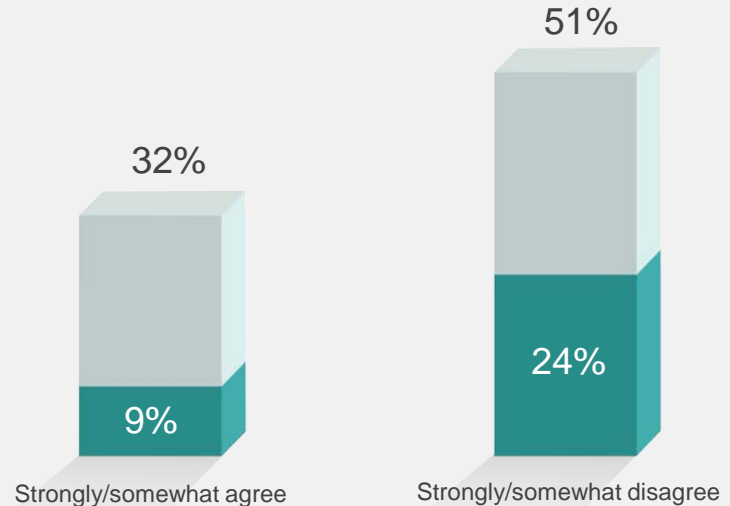
	UK	FR	DE	ZA
In-person interactions are necessary	84%	81%	88%	84%
In-person interactions are unnecessary	10%	15%	8%	13%
Don't know	6%	4%	4%	3%



Germans do not believe face to face communication will become obsolete

How much do you agree or disagree with the following statement?

Remote teams and better communication technology will make face to face communication obsolete.



*Darker colors indicate stronger intensity of answer

**17% of Respondents said "Don't know"



Germans do not believe face to face communication will become obsolete

How much do you agree or disagree with the following statement?

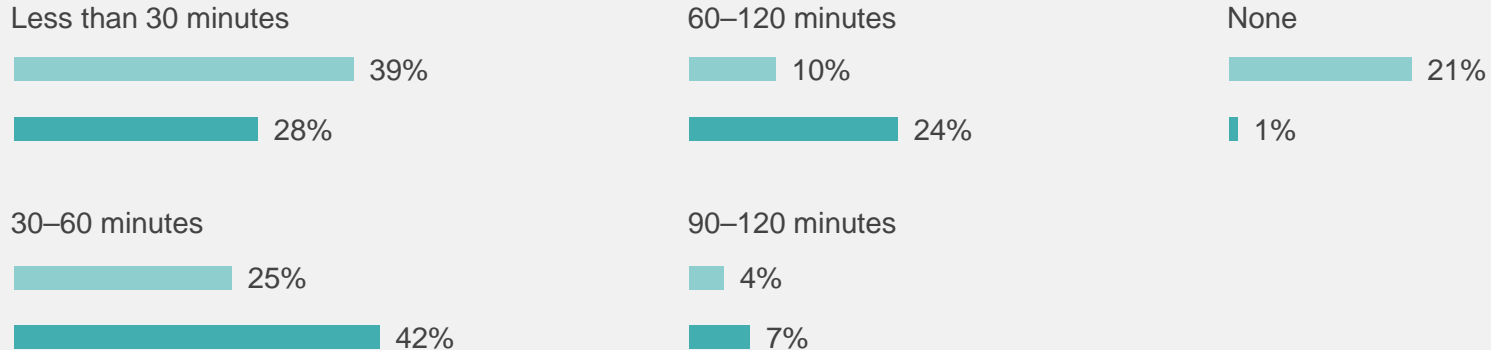
	UK	FR	DE	ZA
Agree	37%	49%	32%	61%
Disagree	54%	45%	51%	35%
Don't know	10%	6%	17%	4%



And most conversations with colleagues in Germany are face to face

1 in 5 German employees say they don't have any remote conversations during a regular day at the office.

On an average day at work, approximately how many minutes of conversation do you exchange with colleagues?

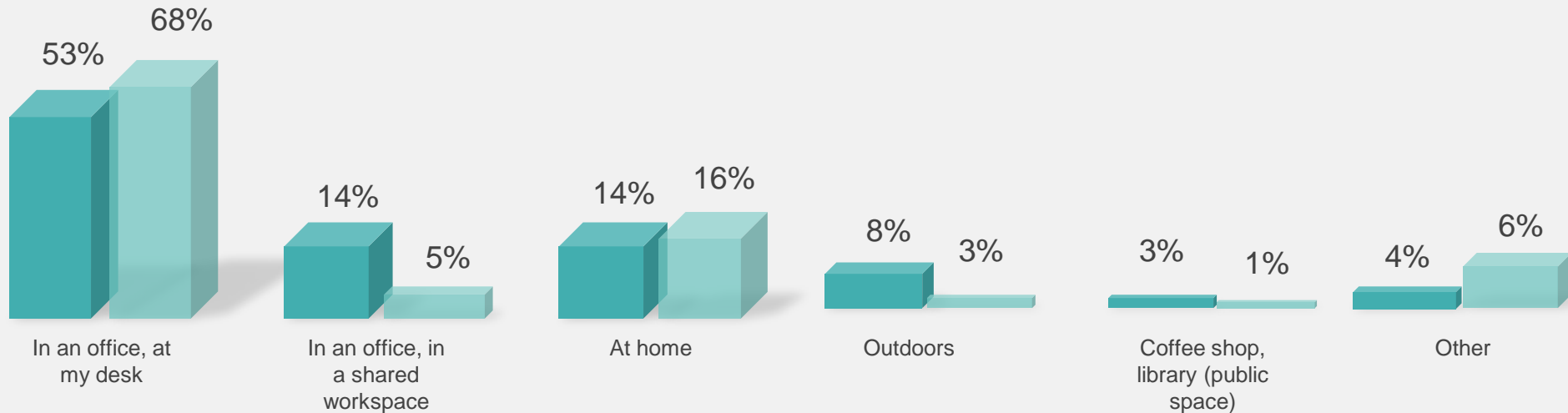


Remote
In-Person

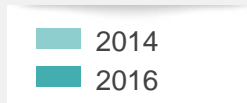


Most Germans say offices are where they do their best work – however shared workspaces in offices are becoming increasingly popular

Where do you do your best work?



4% answered "I do not know" in 2016



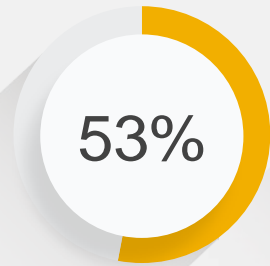
3

Germans do their best work at
office desks.

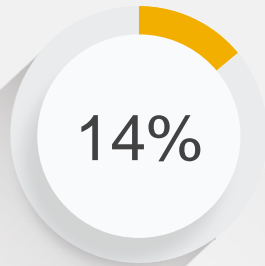


Germans do their best work at office desks

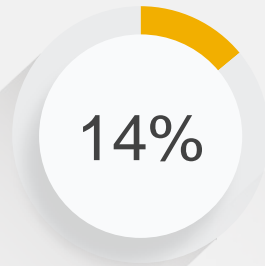
Where do you do your best work?



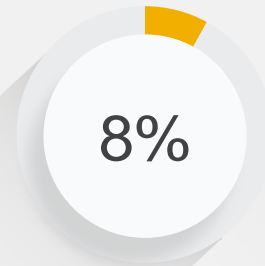
Office desk



Home



**Shared
office space**



Outdoors



Public Space

*4% of Respondents named "Other" places, and 4% said "Don't know"



Germans do their best work at office desks

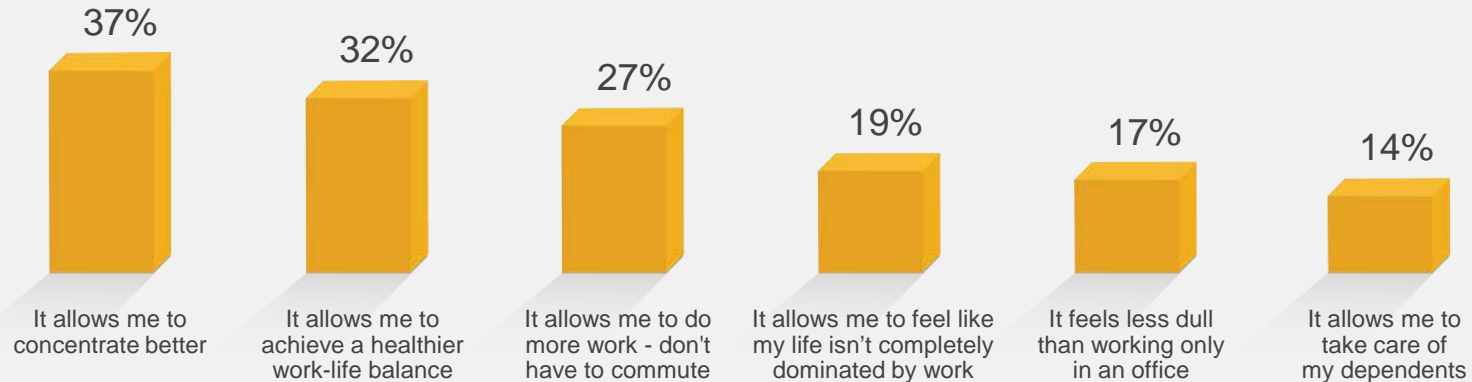
Where do you do your best work?

	UK	FR	DE	ZA
Office desk	52%	51%	53%	67%
Shared office space	12%	18%	14%	8%
Home	15%	16%	14%	19%
Outdoors	5%	5%	8%	3%
Public space	6%	6%	3%	1%



Having the chance to choose where to work lets Germans feel more productive and healthier

In your opinion, what are the two primary benefits of being able to choose whether you work in an office or elsewhere?

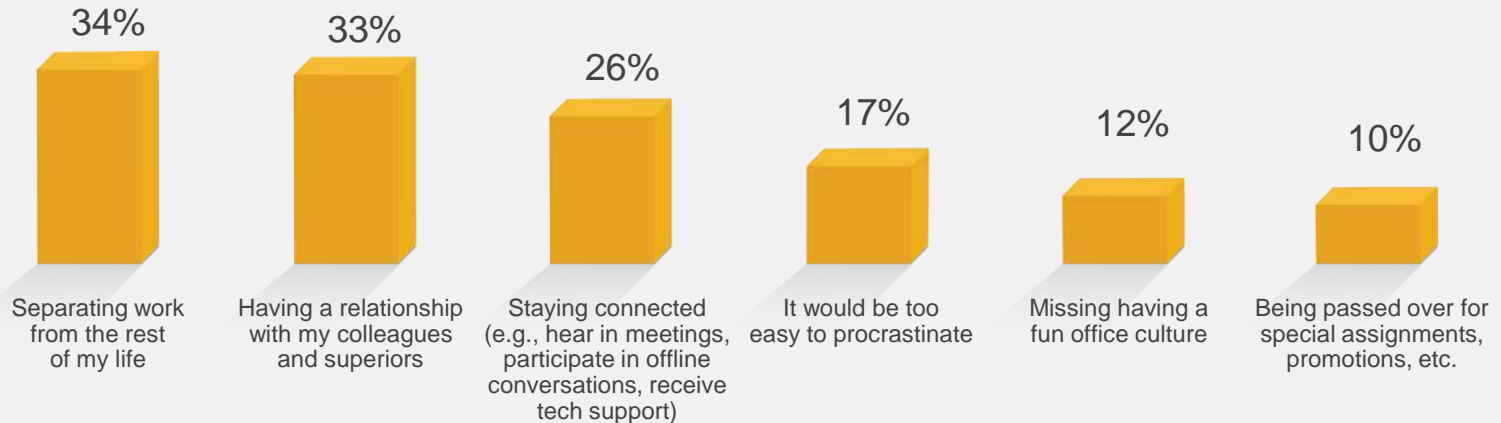


*8% of Respondents said "None of the above"



But remote work might eliminate the separation between professional and personal — and make work relationships tough to maintain

Which of the following concerns you the most about having a job where you would work remotely? Please select up to two.



*19% of Respondents said "Other," "None of the above," or "Don't know"



Most German employees say their employers give them the necessary tech support to work remotely and travel

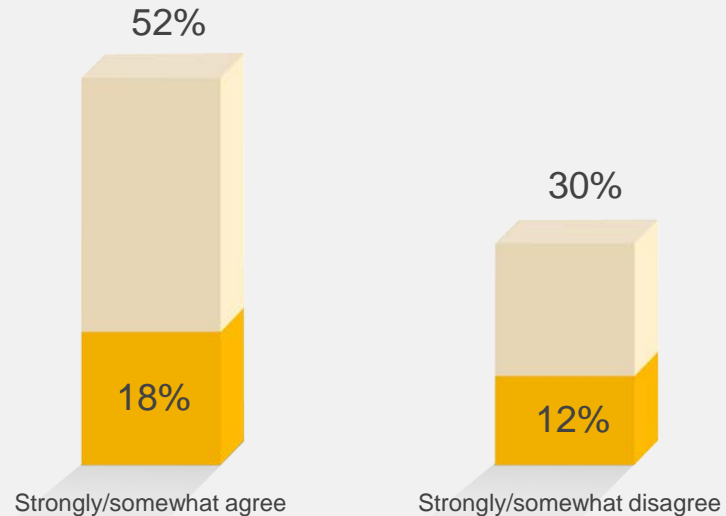
Remote employees in particular feel well-equipped to perform on the road, indicating their performance is not inhibited by being out of an office.

How much do you agree or disagree with the following statement?

While I'm travelling or working remotely, I feel like my employer will help me resolve any technology need I have in order to do my job.

Most likely to agree:

Remote
Employees – 66%



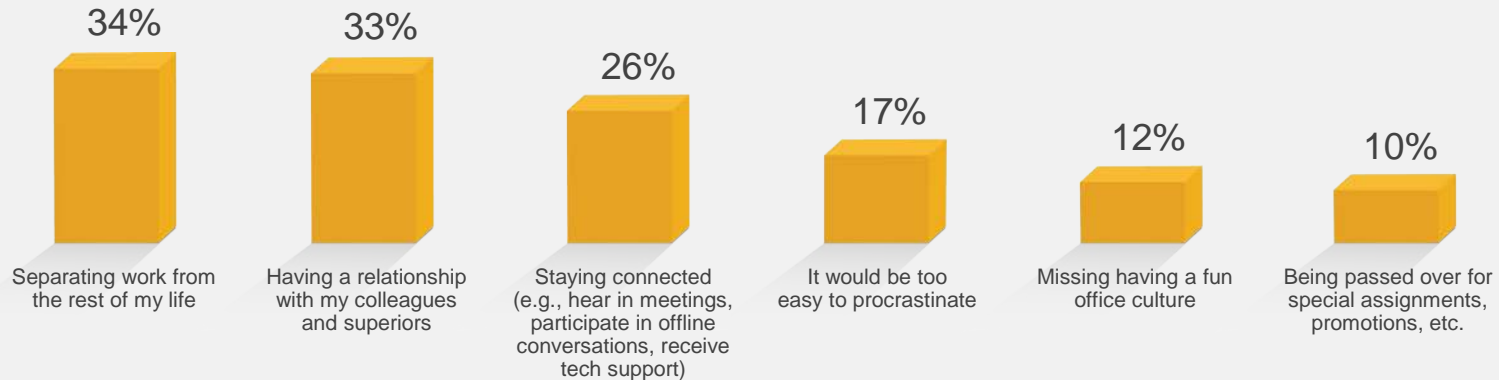
*Darker colors indicate stronger intensity of answer
**18% of Respondents said "Don't know"



Remote work makes it harder to have professional relationships and to stay connected to what's happening with coworkers

Germans agree work isn't life, and also value their workplace relationships, and as a result these are their primary concerns about working remotely.

Which of the following concerns you the most about having a job where you would work remotely? Please select up to two.



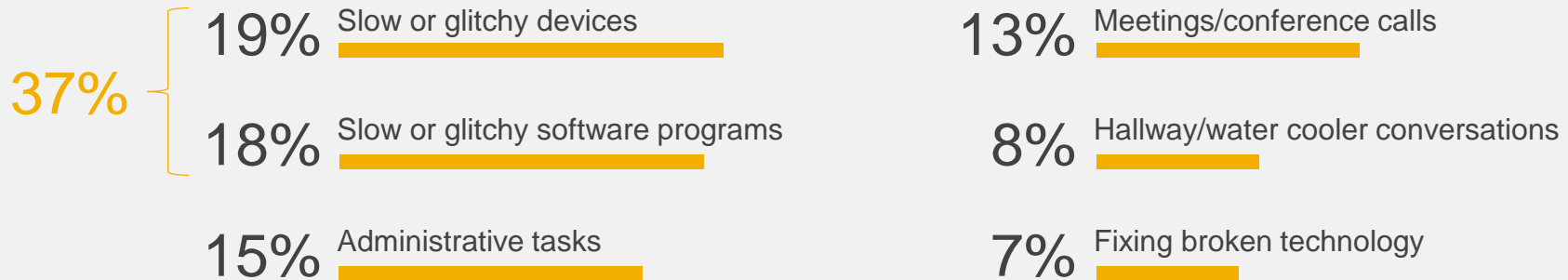
*19% of Respondents said "Other," "None of the above," or "Don't know"

**59% say their concerns are related to their colleague relationships



Glitchy devices and software are the biggest time wasters in German offices

What is the biggest time waster at your current job?



*21% of Respondents said "Other," "None of the above," or "Don't know"

**37% say the biggest time waster is tech-related



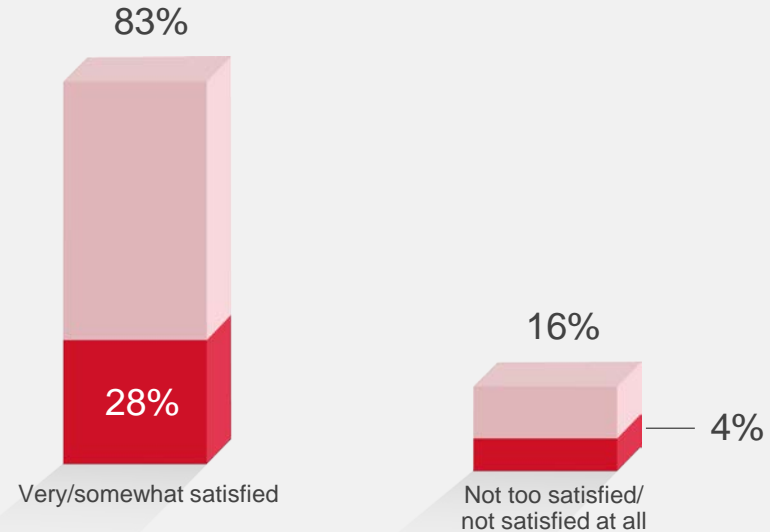
4

The large majority of employees in Germany is satisfied with their workspace technology.



The large majority of employees in Germany are satisfied with their workplace technology

How satisfied are you with the technology in your workplace?



*Darker colors indicate stronger intensity of answer



The large majority of employees in Germany is satisfied with their workplace technology

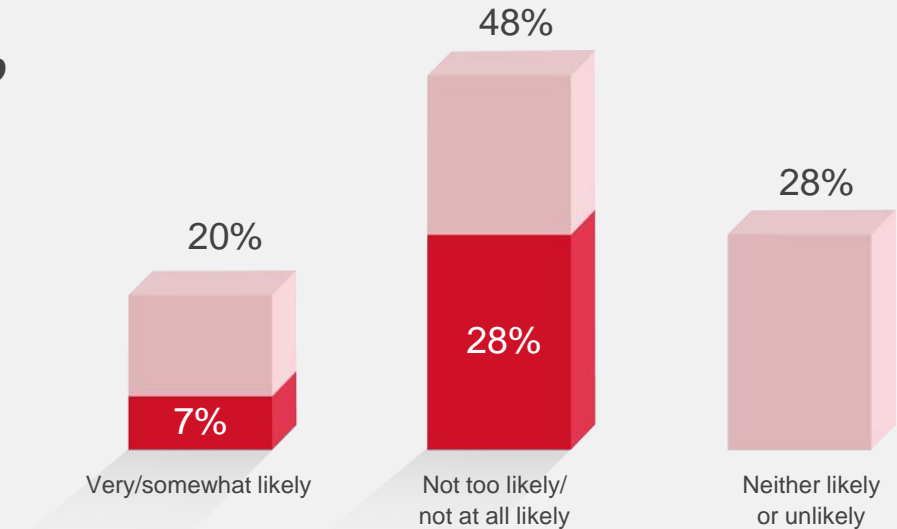
How satisfied are you with the technology in your workplace?

	UK	FR	DE	ZA
Satisfied	75%	82%	83%	85%
Not satisfied	21%	16%	16%	15%



20% of the German workforce would be likely to quit a job that doesn't provide the technology they need

How likely would you be to quit a job if the technology you were provided with didn't meet your standards?



*Darker colors indicate stronger intensity of answer

**4% of Respondents said "Don't know"



20% of the German workforce would be likely to quit a job that doesn't provide the technology they need

How likely would you be to quit a job if the technology you were provided with didn't meet your standards?


	UK	FR	DE	ZA
Likely	21%	38%	20%	31%
Unlikely	43%	34%	48%	39%
Neither likely nor unlikely	29%	24%	28%	28%



A worker's home technology is more likely to be cutting edge than workplace technology


The larger the business size, the more likely employees are to say they have more cutting edge technology at home versus the workplace.

Compared to the workplace, is the technology you use at home...



50%

More cutting edge
than at work



19%

Less cutting edge
than at work



28%

On par with the
technology I use at work

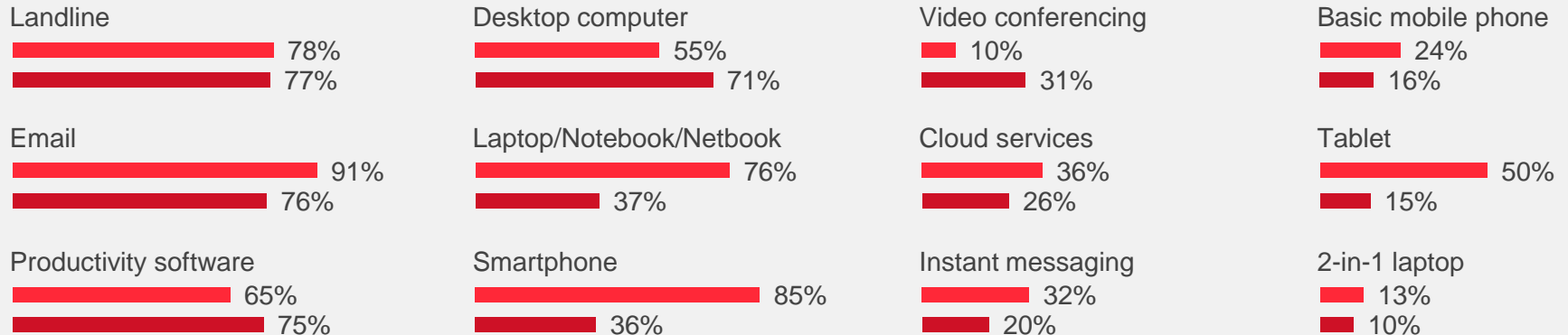
*3% of Respondents said "Don't know"



Traditional office products still dominate the workplace

Germans use stationary devices like landlines and desktops more at work than they do mobile technology like laptops and cellphones.

Which of the following technology products do you use on a day-to-day basis both at work and for personal use?



Personal
Work



Germans and UK employees least likely of EMEA employees to use a laptop for work

Which of the following technology products do you use on a daily basis both at work and for personal use?

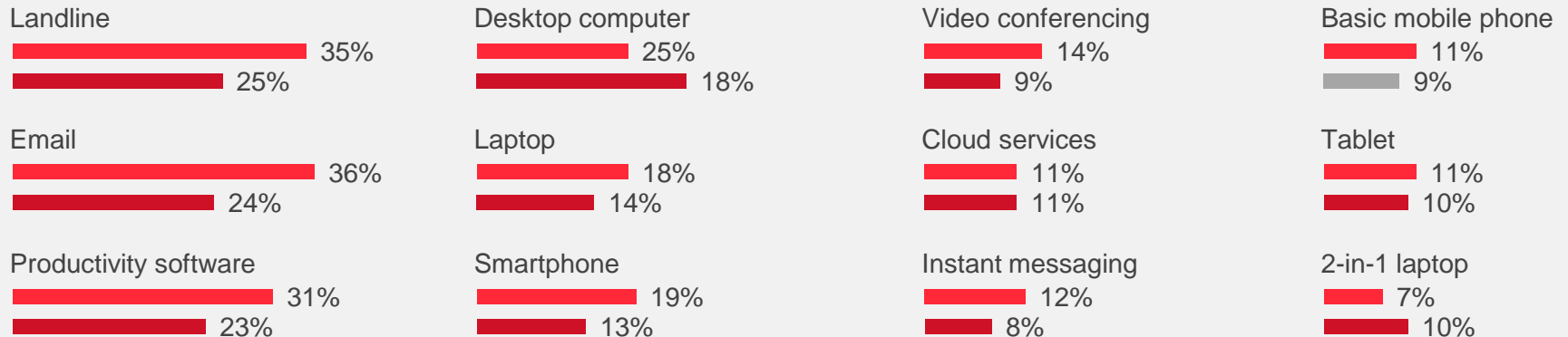
	UK		FR		DE		ZA	
	Work	Personal	Work	Personal	Work	Personal	Work	Personal
Email	82	90	72	81	76	91	92	86
Productivity software	73	51	66	49	75	65	89	63
Desktop computer	68	40	74	54	71	55	72	40
Landline	65	59	68	66	77	78	85	36
Laptop/Notebook/Netbook	37	76	45	71	37	76	57	70
Smartphone	36	81	43	83	36	85	48	92
Cloud services	32	42	43	44	26	36	47	57
Video conferencing	30	11	42	17	31	10	33	12
Instant messaging	25	42	37	47	20	32	43	60
Basic mobile phone	15	23	28	32	16	24	30	52
Tablet	13	54	26	58	15	50	18	55
2-in-1 laptop	11	15	23	26	10	13	23	21



Workplace tech is primarily seen as useful and user-friendly

The defining characteristics of all devices is their utility and ease of use. Few Germans describe their workplace tech as cutting edge.

*Which two adjectives best describe the following types of technology at your workplace?
(Among Germans who use the product at work)*

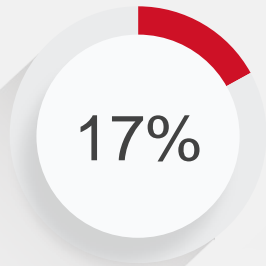


Useful Out of date
User friendly/Beautiful/Cutting edge



And most say technology would only have a little bit of influence over their choice of a new position

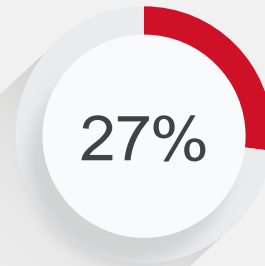
How much would the technology available to staff influence your decision to take a new position?



A lot of influence



A little influence



No influence at all

78% of Millennials say technology would have a lot (21%) or a little (57%) influence on their job decision, compared to 61% of Non-Millennials

*7% of Respondents said "Don't know"



Young workers are more likely than older employees to care about technology on the job

And to make career decisions based on technology.

Likely to quit a job with
substandard tech

Ages 18–34



31%

Ages 35+



15%

Workplace tech would have a lot of influence
when deciding to take a new job

Ages 18–34



21%

Ages 35+



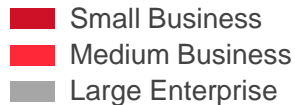
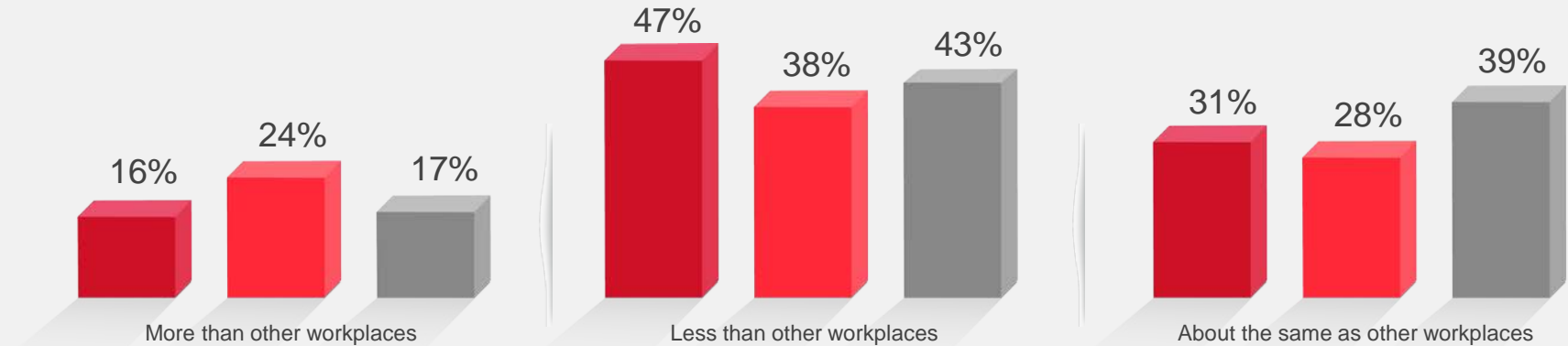
15%



But few workplaces are early adopters of new tech

More employees, regardless of size, believe their workplaces update their tech less than elsewhere — with almost half of small business employees saying their workplaces are behind the curve.

As far as you know, would you say your workplace updates its technology...(Among)



Landlines, productivity software and email are the most commonly used products at work

Which of the following technology products do you use on a day-to-day basis <i>at work</i> ?	DE	Office	Remote
Landline	77	84	75
Email	76	87	76
Productivity software	75	86	77
Desktop computer	71	77	71
Laptop/Notebook/Netbook	37	43	56
Smartphone	36	40	61
Video conferencing	31	38	44
Cloud services	26	31	47
Instant messaging	20	24	36
Basic mobile phone	16	15	24
Tablet	15	19	31
2-in-1 laptop	10	11	23



Germans use smartphones and email for personal technology needs

Which of the following technology products do you use on a day-to-day basis for <i>personal use</i> ?	DE	Male	Office	Remote
Email	91	90	91	84
Smartphone	85	88	86	85
Landline	78	82	79	76
Laptop/Notebook/Netbook	76	75	75	77
Productivity software	65	68	70	65
Desktop computer	55	62	56	58
Tablet	50	55	54	58
Cloud services	36	40	39	42
Instant messaging	32	35	35	41
Basic mobile phone	24	21	24	26
2-in-1 laptop	13	14	14	22
Video conferencing	10	13	11	15



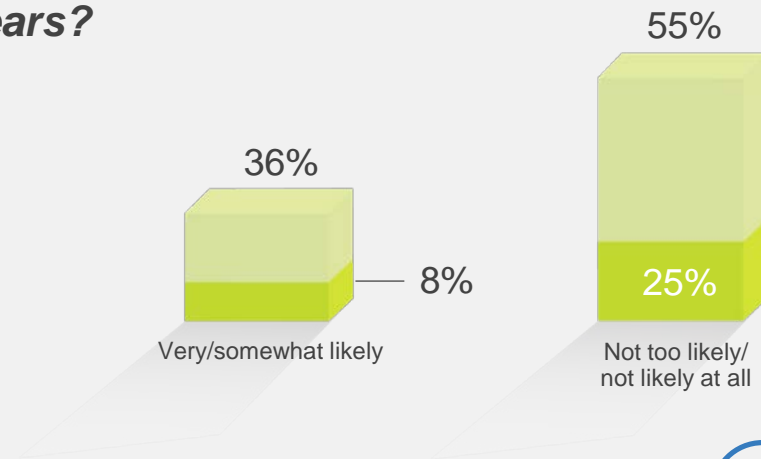
5

Smart workspaces are exciting, but not necessarily expected in the near future.



Smart workplaces are exciting, but not necessarily expected in the near future

How likely do you think you will be working in a “smart” office that uses the Internet of Things in the next five years?



*Darker colors indicate stronger intensity of answer

**9% of Respondents said “Don’t know”



Smart workplaces are exciting, but not necessarily expected in the near future

How likely do you think you will be working in a “smart” office that uses the Internet of Things in the next five years?

	UK	FR	DE	ZA
Likely	41%	57%	36%	63%
Not likely	43%	38%	55%	34%



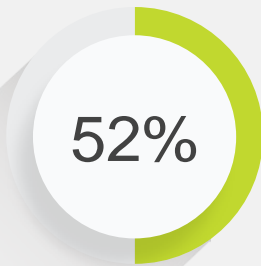
More than a third of German employees want a smarter office, but the majority of the workforce is happy with today's equipment

When thinking about your current workplace, is it...?



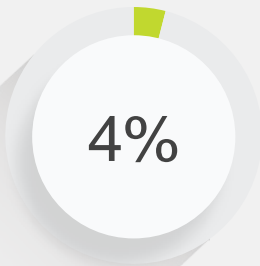
38%

Not smart
enough



52%

As smart as
I want it to be



4%

Too smart



More than a third of German employees want a smarter office, but the majority of the workforce is happy with today's equipment

When thinking about your current workplace, is it...?

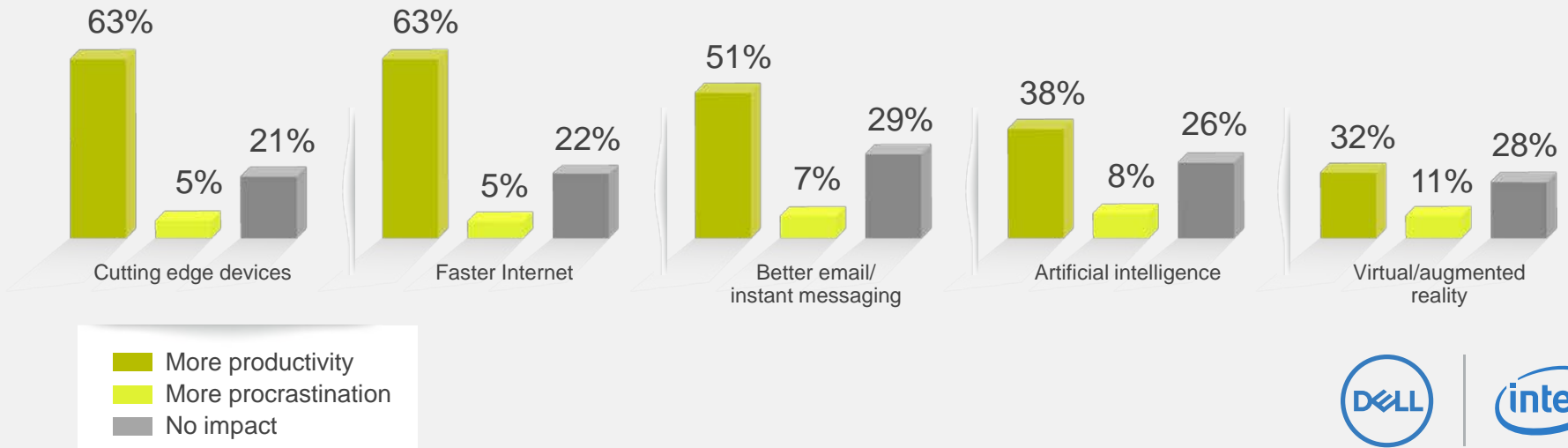
	UK	FR	DE	ZA
Not smart enough	47%	38%	38%	67%
As smart as I want it to be	42%	42%	52%	29%
Too smart	5%	14%	4%	4%



Germans anticipate that future tech like cutting edge devices and faster Internet will increase productivity

Artificial intelligence and virtual reality are not seen as advancements that would boost productivity as much.

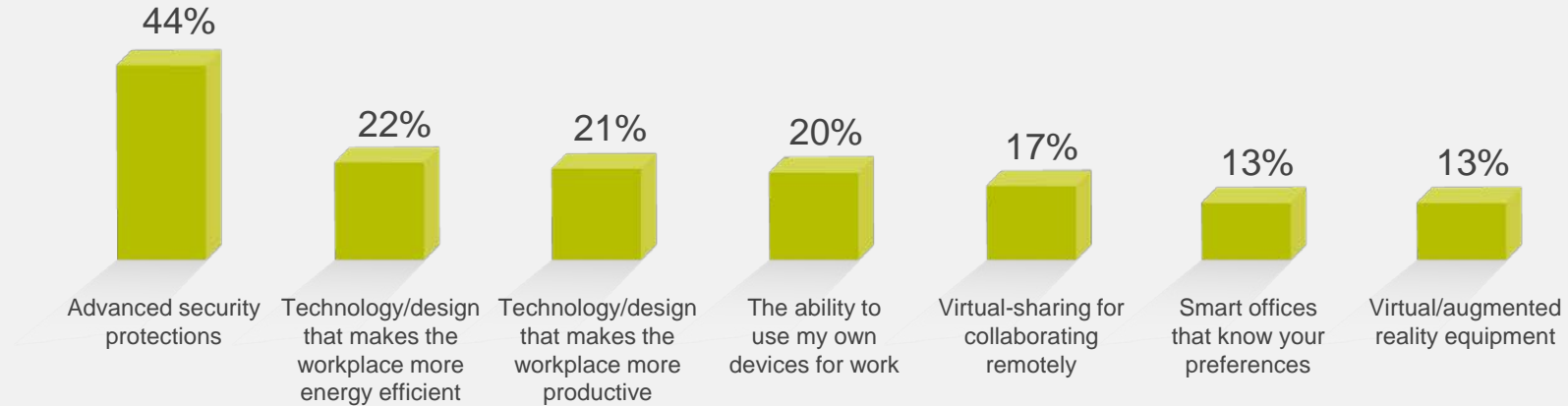
For each of the following technology advancements in the workplace, please say whether it would primarily lead to more...



Security considerations are most important for “smart” workplaces, too

Everything else falls second to security for Germans, with smart offices and virtual reality trailing.

*Thinking about your ideal workplace, please rate how important you think it is for it to have...
(Showing % very important)*



Methodology



Methodology

Penn Schoen Berland (PSB) conducted 400 online interviews in Germany between May 4–9, 2016 among German Employees. Throughout the report, DE Employees are referred to as ‘Germans’. The report primarily analyzes the following groups:

Audience	Definition	N Size	MoE (%)
German Employees	German adults who work more than 35 hours a week and work in one of seven target industries: Education, Government, Financial Services, Healthcare, Manufacturing, Media & Entertainment, and Retail	400	± 4.90
Men	Male German Employees	231	± 6.45
Women	Female German Employees	169	± 7.54
Millennials (18–34)	German Employees Age 18–34	133	± 8.50
35+	German Employees Age 35+	267	± 6.00
Small Business	German Employees who work for a company or organization with less than 100 people	124	± 8.80
Medium Business	German Employees who work for a company or organization with between 100 and 5,000 people	194	± 7.04
Large Enterprise	German Employees who work for a company or organization with more than 5,000 people	82	± 10.82
Office Employee	German Employees who work in an office at least a few times a week	315	± 5.52
Remote Working Employee	German Employees who work either at home or in a public place at least a few times a week	107	± 9.47



Industry breakdown

What is your organization's primary type of business at your location?	DE	Male	Female	18-34	35+	SB	MB	LE	Office	Remote
Manufacturing	25	33	15	18	29	22	31	17	24	14
Healthcare	23	14	34	26	21	28	21	19	21	16
Retail	17	16	19	22	15	20	14	21	16	25
Education	12	11	12	9	13	15	10	11	12	20
Government	10	10	9	8	11	3	11	17	12	8
Financial Services	10	13	6	10	10	4	12	13	12	12
Media & Entertainment	4	3	5	6	2	7	2	3	4	4



