

# Future Workforce Study

United States | 2016



The story of the future American workforce is a story about the **American Millennial.**

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# American Millennials are changing the future workplace

They are **less personally invested** in their jobs,

but place **greater value on workplace technology**.

They acknowledge that **traditional face to face communication still dominates**, as well as how communications technologies are changing the future workspace itself,

but see how **communications technologies are transforming relationships** with colleagues.

And they are willing to embrace and even drive the transformation.



# Key Findings

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# 1

American Millennials  
are less personally  
invested in their jobs.

45%

of American Millennials say work is part of their core identity compared to 63% of Baby Boomers; only 27% of Millennials say work is life compared to 48% of Baby Boomers.



# 2

But place greater value on workplace technology.



# 42%

Nearly half of American Millennials (42%) say they'd likely quit a job if workplace tech didn't meet their standards – nearly 4x as many as Baby Boomers (14%); 81% of Millennials say the technology available influences their decision to take a new position compared to 53% of Baby Boomers.



# 3

They acknowledge that traditional face to face communication still dominates, but see how communications technologies are impacting relationships with colleagues.



55%

of Americans prefer face to face communications in the workplace; however, 62% of Millennials say remote teams and better communication technology will make face to face communication obsolete compared to 48% of Gen X and 32% of Baby Boomers.



# 4

As well as how communications technologies are changing the future workspace itself.

72%

Nearly 3 in 4 American Millennials (72%) say it's likely they will be working in a 'smart' office in the next five years; compared to 52% of Gen X and 35% of Baby Boomers.





# 5

And they are willing to embrace and even drive the transformation.

## 68%

68% are willing to use AR/VR products in their professional life (compared to 55% of Gen X and 42% of Baby Boomers). 70% of Millennials agree that their job could be made easier with the assistance of AI (compared to 49% of Gen X and 34% of Baby Boomers).



# 6

The traditional workplace doesn't have the same value for Millennials as for older generations of American workers.

## 29%

of Millennials say they do their best work outside of the office – whether at home, in public or outside (compared to 19% of Gen X and 15% of Baby Boomers). Further, maintaining work relationships is less important to Millennials than older Americans (20% for Millennials; 34% for Gen X and Baby Boomers).



# 7

Millennials value choice and see the sharing economy as providing it.

## 69%

of American Millennials say they will participate in the sharing economy in some way (compared to 55% of all Americans and 42% of Baby Boomers). They see the top benefit of the sharing economy as providing more choices (31%).



# Key Supporting Slides

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1

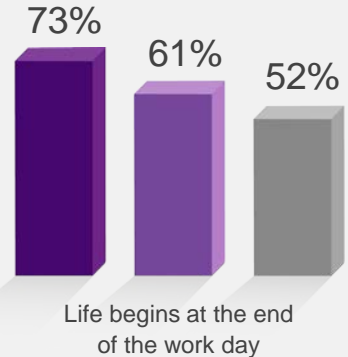
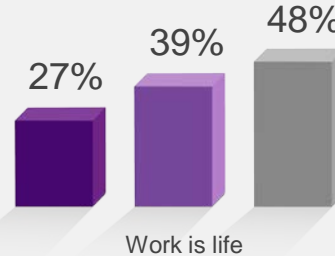
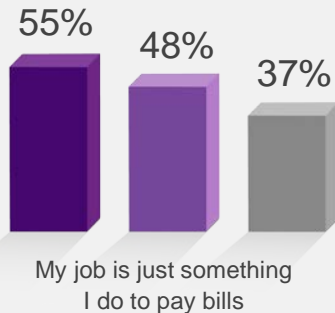
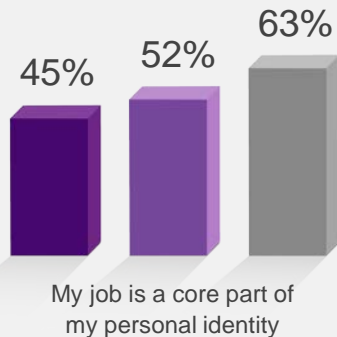
Millennials are less personally  
invested in their jobs.



# Age plays a major part in how Americans view their jobs

While older Americans are much more personally invested in their jobs than younger Americans, a majority of American Millennials look at work as just something to pay the bills.

*Which of the following is closer to your view?*



Millennials  
Gen X  
Baby Boomers



2

But Millennials place great value on workplace technology.

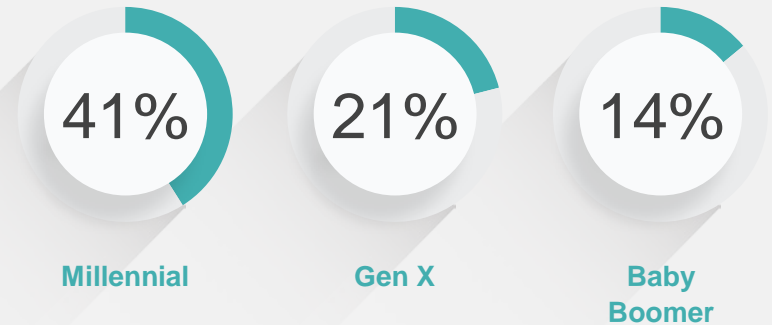
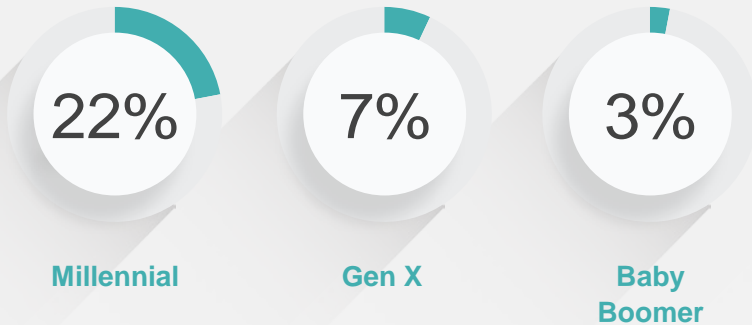


# Employers are most at risk of losing Millennials due to their tech offering

Millennials place a greater premium on the tech they use in the workspace.

*Very likely to quit a job with substandard tech*

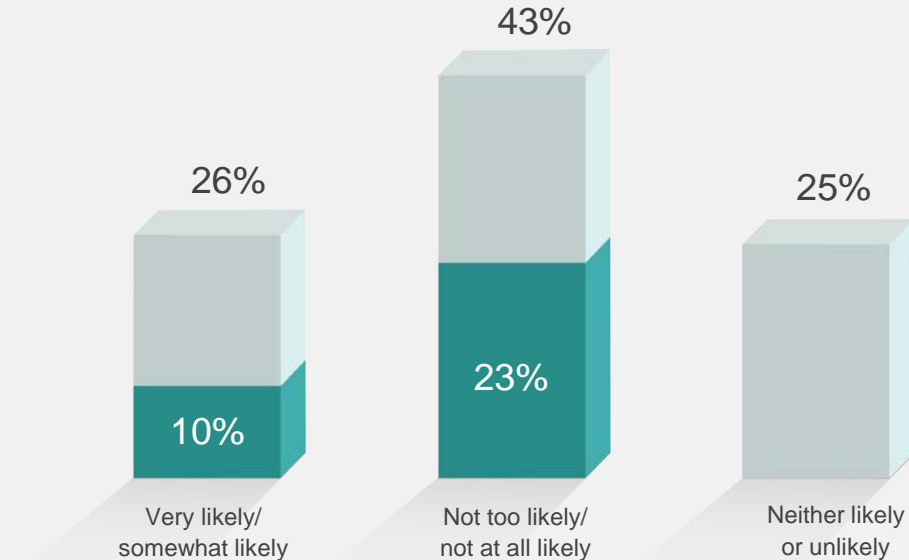
*Workplace tech would have a lot of influence when deciding to take a new job*





# 1 in 4 overall and 2 in 5 Millennials say poor technology in the workplace would make them likely to quit their job

*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

\*\*6% of Respondents said "Don't know"



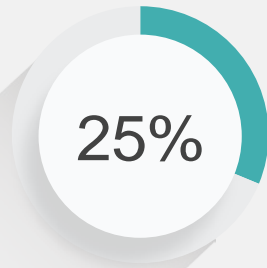
# 1 in 4 overall and 2 in 5 Millennials say poor technology in the workplace would make them likely to quit their job

How likely would you be to quit a job if the technology you were provided with didn't meet your standards?	Male	Female	Mill.	Gen X	Boomer	SB	MB	LE	Office	Remote
Very likely	13	8	<b>22</b>	7	3	15	10	5	10	<b>25</b>
Somewhat likely	19	14	<b>20</b>	17	11	9	21	12	17	<b>25</b>
Neither likely nor unlikely	19	29	26	28	20	27	25	20	26	24
Somewhat unlikely	21	19	21	19	<b>21</b>	26	17	20	21	10
Very unlikely	24	22	8	20	<b>40</b>	18	19	35	20	13

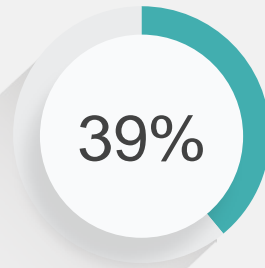


# Nearly 2 in 3 overall – and 8 in 10 Millennials – say technology would influence a decision to take or decline a new position

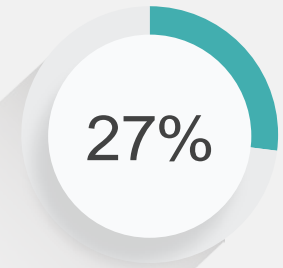
*How much would the technology available to staff influence your decision to take a new position?*



**A lot** of influence



**A little** influence



**No** influence at all

\*\*9% of Respondents said "Don't know"



# Nearly 2 in 3 overall – and 8 in 10 Millennials – say technology would influence a decision to take or decline a new position

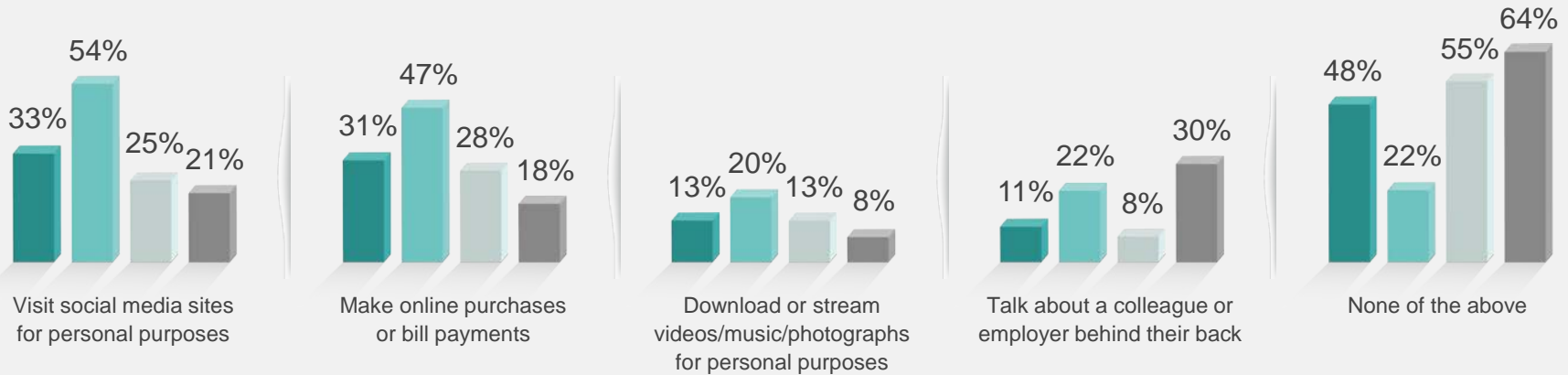
How much would the technology available to staff influence your decision to take a new position?	Male	Female	Mill.	Gen X	Boomer	SB	MB	LE	Office	Remote
A lot of influence	26	24	41	21	14	26	28	15	26	51
A little influence	42	36	40	37	39	39	39	37	40	27
No influence at all	25	29	16	31	34	26	23	38	26	17
Don't know	7	11	4	11	13	9	9	9	8	5



# Millennials are significantly more likely to use a work device for personal purposes

Half have used their work devices to visit social media, shop, or pay bills online.

*Have you used a work device to do any of the following? Please select all that apply.*



■ All Americans   ■ Millennials   ■ Gen X   ■ Baby Boomers



# 3

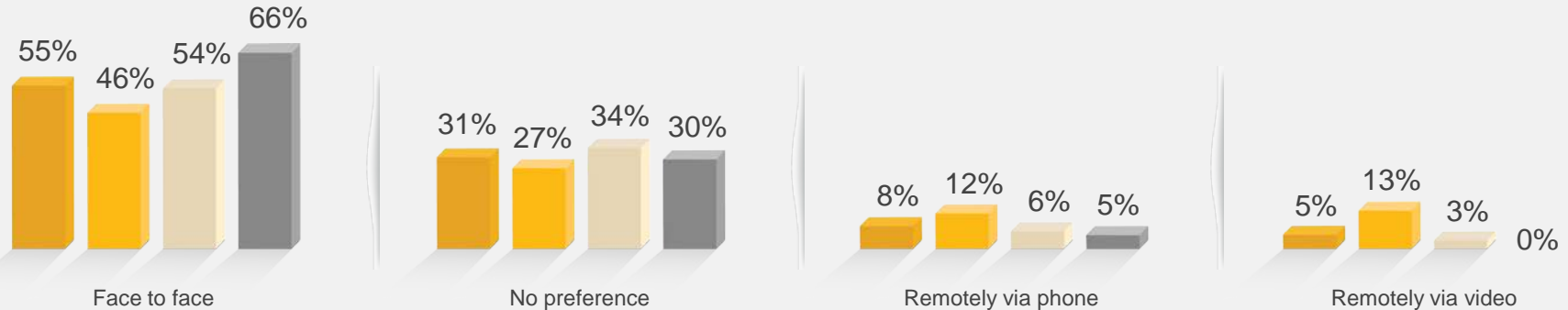
They acknowledge that traditional face to face communication still dominates, but see how communications technologies are impacting relationships with colleagues.



# 55% of Americans prefer face to face conversations while 3 in 10 have no preference between face to face and remote

More than half (52%) of Millennials either have no preference or prefer remote communications.

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



■ All Americans ■ Gen X  
■ Millennials ■ Baby Boomers

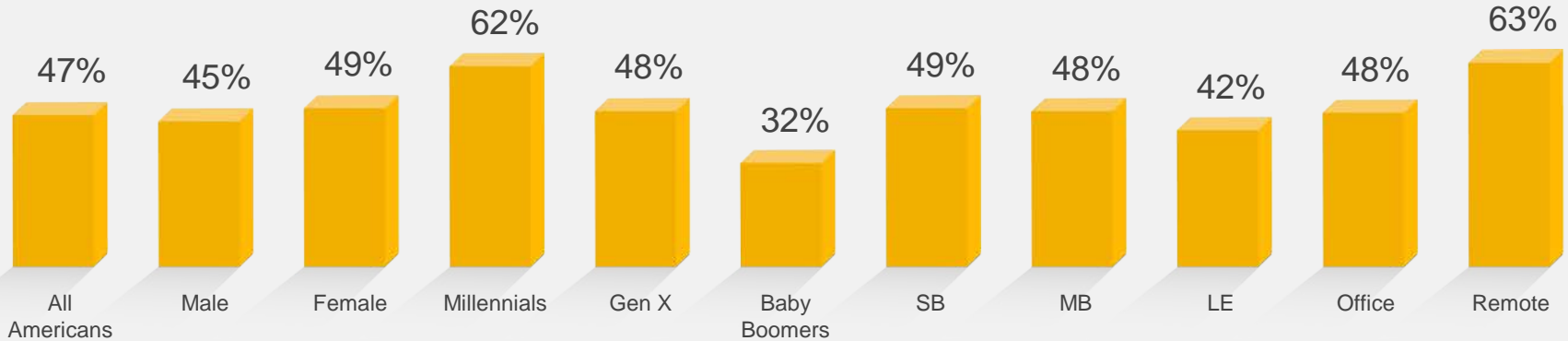



# Americans split on whether technology will eventually make face to face interactions a thing of the past

Despite the preference for face to face interactions, many Americans – especially younger and remote employees – predict changes in the future.

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

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



 % agree

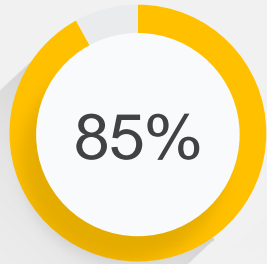




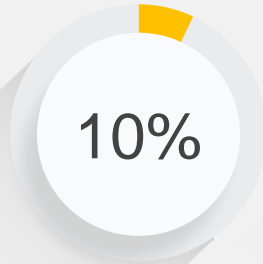
# The vast majority recognize the importance of in-person interactions

Americans universally recognize in-person interactions lead to a better work environment.

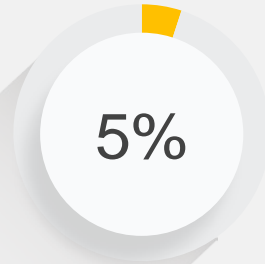
*Which of the following is closer to your view?*



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**

Twice as many Millennials (16%) as Gen X (8%) say in-person interactions are inefficient



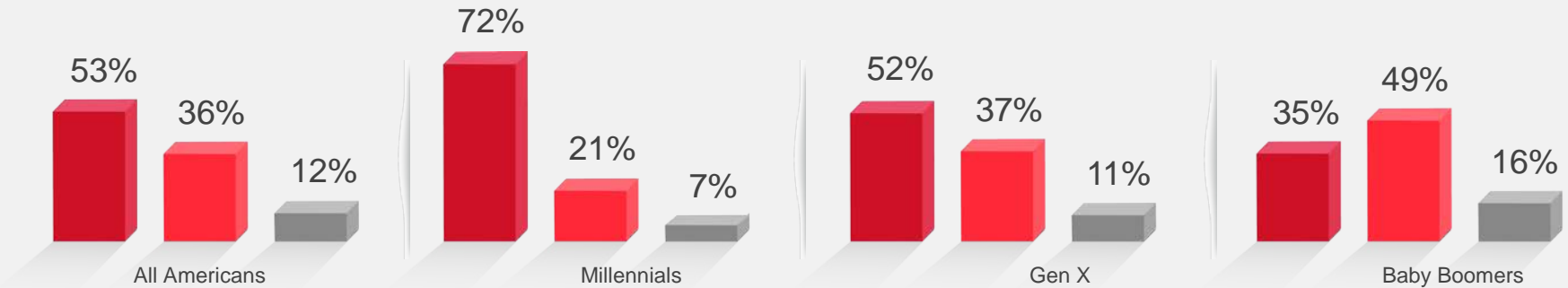
# 4

As well as how communications technologies are changing the future workspace itself.



# 72% of Millennials anticipate working in smart offices 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?*



■ Likely  
■ Not Likely  
■ Don't know



# 72% of Millennials anticipate working in smart offices in the near future

	Male	Female	Mill.	Gen X	Boomer	SB	MB	LE	Office	Remote
Total Likely	52	51	<b>72</b>	52	35	<b>58</b>	<b>56</b>	37	55	<b>73</b>
Total Not Likely	34	38	21	37	49	35	32	47	34	19
Don't Know	13	10	7	11	16	7	12	15	11	8



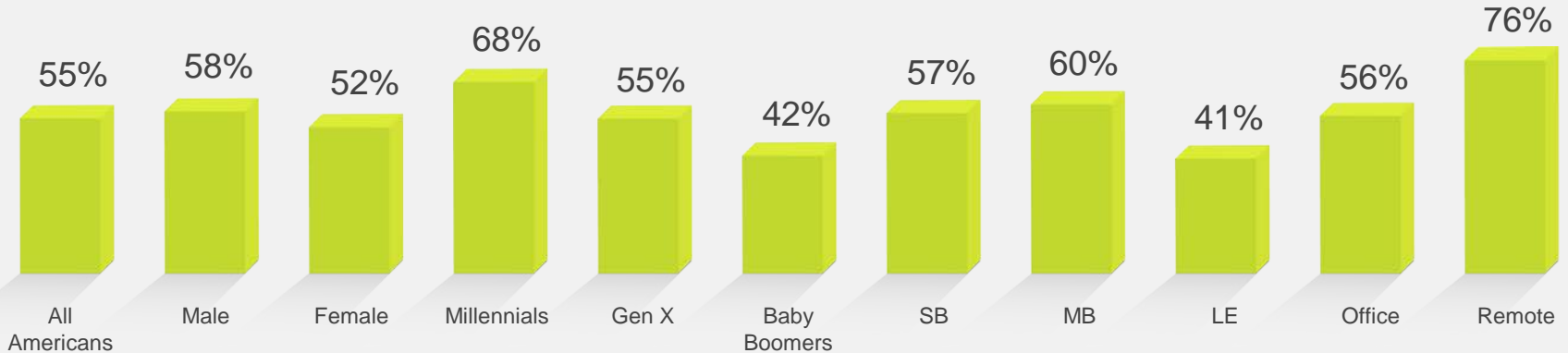
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And they are willing to embrace and even drive the transformation.



# Americans overall are split on AR/VR but 7 in 10 Millennials and remote employees are willing to use it

*How willing would you be to use augmented/virtual reality products in your professional life?*



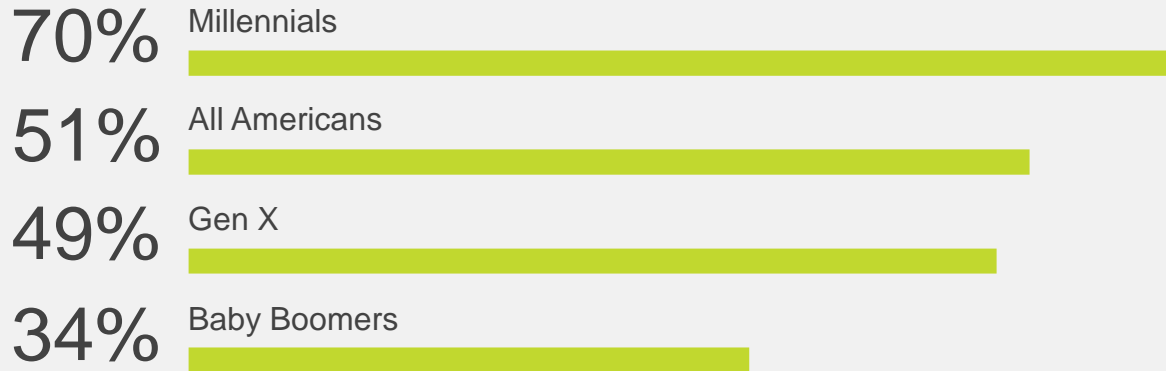
Very + Somewhat Willing


\*11% of Respondents said "Don't know"



# Significantly more Millennials see the potential benefit of AI than older generations

*Thinking about your own job, do you agree or disagree that it could be made easier with the assistance of artificial intelligence?*



 % agree



# 6

The traditional workplace doesn't have the same value for Millennials as for older generations of American workers.

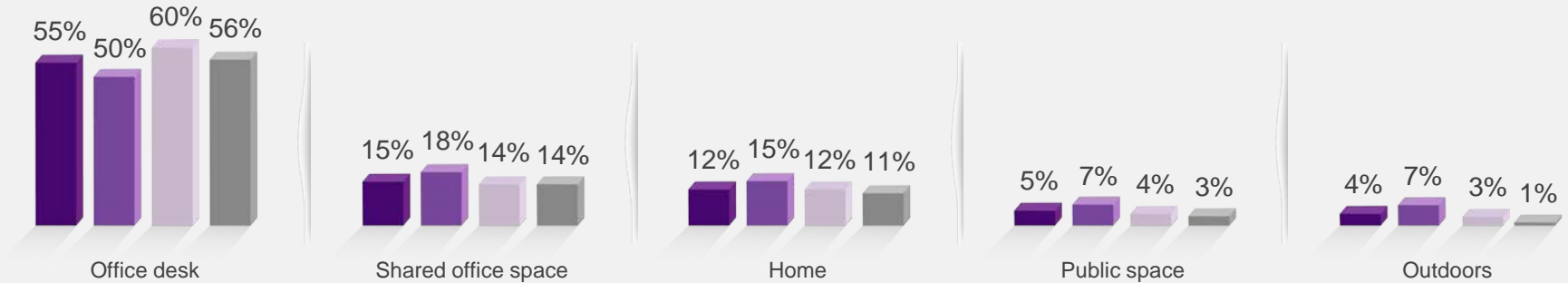




# Increasingly, Millennials looking to non-office environments for productivity

3 in 10 Millennials say they do their **best work** outside of the office – whether at home, in public or outside.

*Where do you do your best work?*



■ All Americans   ■ Millennials  
■ Gen X   ■ Baby Boomers

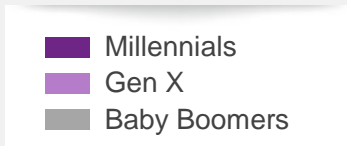
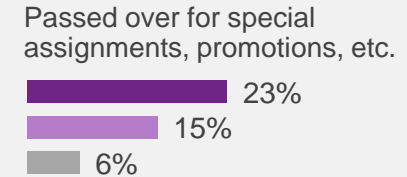
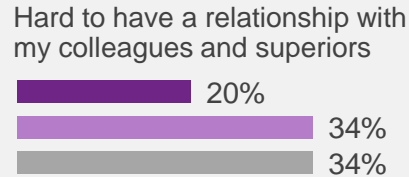
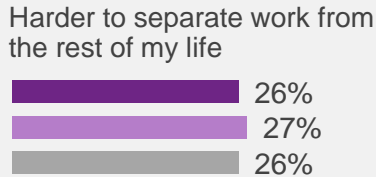
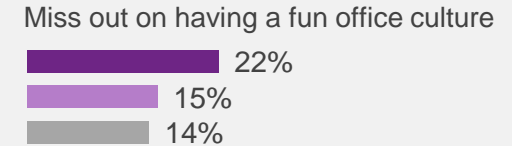
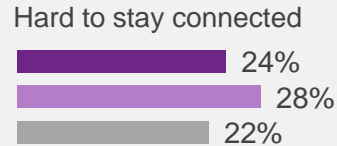
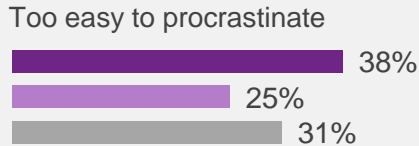
\*29% of Millennials report home, public space and outdoors as where they do their best work outside of the office



# Maintaining work relationships is less important to Millennials than older Americans

Millennials understand that communications technology would allow them to stay connected and maintain relationships – their concerns are more about procrastination and missing out.

*Which of the following concerns you the most about having a job where you would work remotely?*



\*35% of Respondents said "None of the above"



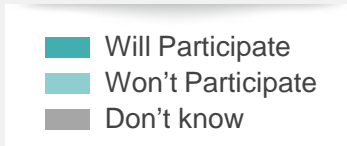
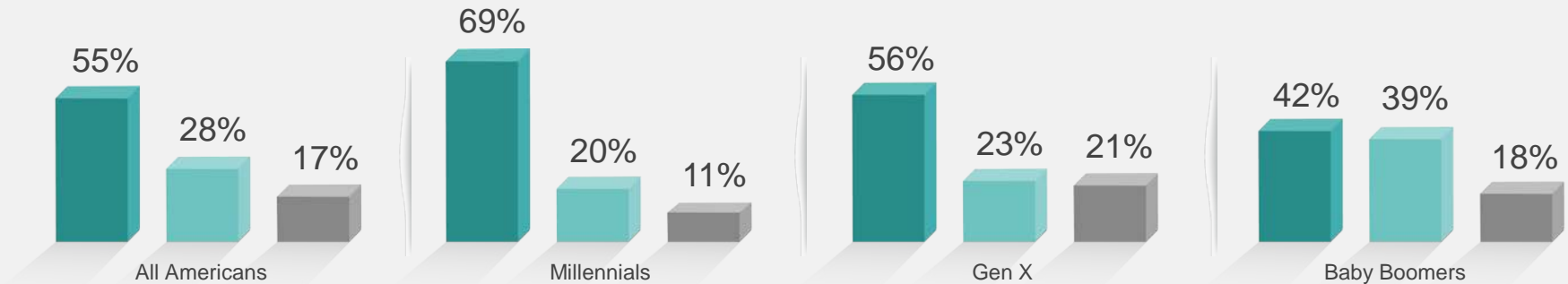
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Millennials value choice and see the sharing economy as providing it.



# 7 in 10 Millennials will participate in the sharing economy; Baby Boomers are split

*How, if at all, do you plan on participating in the sharing economy in 2017?*



# 7 in 10 millennials will participate in the sharing economy; Baby Boomers are split

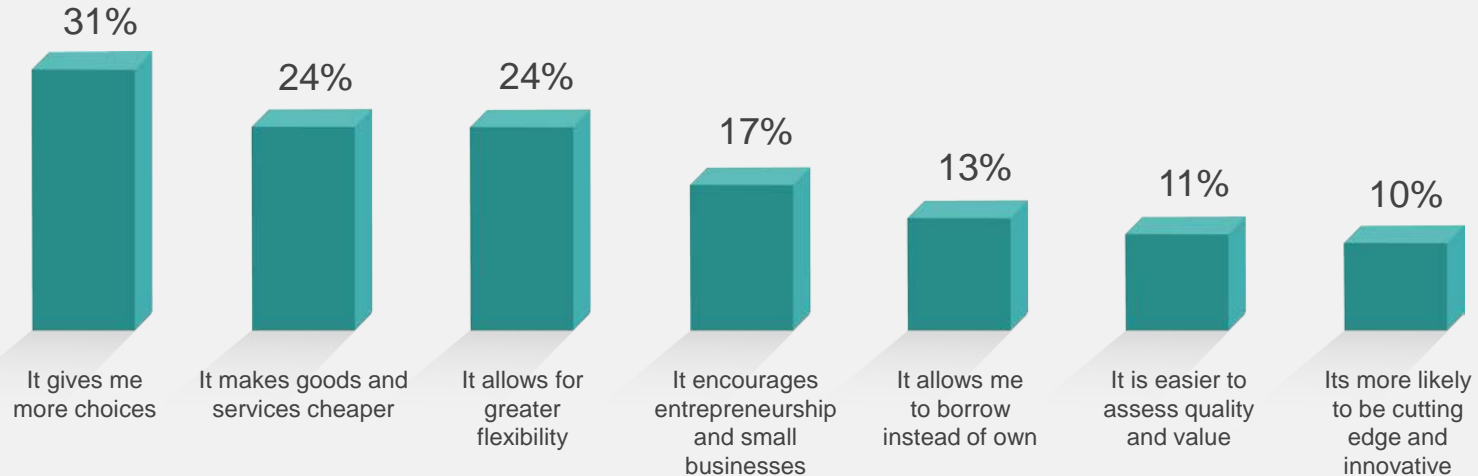
How, if at all, do you plan on participating in the sharing economy in 2017?	All	Male	Female	Mill.	Gen X	Boomer	SB	MB	LE	Office	Remote
Both by consuming and selling goods or services	25	25	25	29	28	18	25	30	14	28	41
By consuming goods or services	22	24	21	25	22	20	19	23	25	22	20
By selling goods or services	8	9	8	15	6	4	16	8	2	8	16
I won't participate in the sharing economy	28	26	29	20	23	39	23	25	39	25	14
Don't know	17	16	18	11	21	18	17	15	20	17	9



# The sharing economy gives more choices

Choice is far and away the biggest benefit for males, Millennials, and remote employees.

*In your opinion, what are the two primary benefits of the sharing economy?*



\*7% of Respondents said there are no benefits of the sharing economy, and 19% said "Don't know"



# 7 in 10 millennials will participate in the sharing economy; Baby Boomers are split

In your opinion, what are the two primary benefits of the sharing economy?	Mill.	Gen X	Boomers
It gives me more choices	34	32	27
It makes goods and services cheaper	24	23	25
It allows for greater flexibility	23	26	24
It encourages entrepreneurship and small businesses	20	19	12
It allows me to borrow instead of own goods and services	15	10	16
It is easier to assess quality and value of what I am paying for	13	12	8
It is more likely to be cutting-edge and innovative	14	11	4



# Methodology

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# Methodology

Penn Schoen Berland (PSB) conducted 400 online interviews in the US between April 27-May 14, 2016 among American Employees. Throughout the report, Employees are referred to as 'Americans'. The report primarily analyzes the following groups:

Audience	Definition	N Size	MoE (%)
USA Employees	American 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 American Employees	177	± 7.37
Women	Female American Employees	223	± 6.56
Millennials	American Employees Age 18-34	82	± 10.82
Gen X	American Employees Age 35-54	197	± 6.98
Baby Boomers	American Employees Age 55+	121	± 8.91
Small Business	American Employees who work for a company or organization with less than 100 people	94	± 10.11
Medium Business	American Employees who work for a company or organization with between 100 and 5000 people	211	± 6.75
Large Enterprise	American Employees who work for a company or organization with more than 5000 people	95	± 10.05
Office Employee	American Employees who work in an office at least a few times a week	342	± 5.30



# Audience Summary: Millennials, Gen X, Baby Boomers

Key Difference	Data
Millennials are less personally invested in their jobs	45% of American Millennials say work is part of their core identity compared to 63% of Baby Boomers; only 27% of Millennials say work is life compared to 48% of Baby Boomers.
Millennials place greater value on workplace technology	Nearly half of American Millennials (42%) say they'd likely quit a job if workplace tech didn't meet their standards – nearly 4x as many as Baby Boomers (14%); 81% of Millennials say the technology available influences their decision to take a new position compared to 53% of Baby Boomers.
While acknowledging traditional face to face communication still dominates, Millennials see it changing quickly	55% of Americans 62% of Americans prefer face to face communications in the workplace; however, Millennials say remote teams and better communication technology will make face to face communication obsolete compared to 48% of Gen X and 32% of Baby Boomers.
As well as how communications technologies are used in the future workplace	Nearly 3 in 4 American Millennials (72%) say it's likely they will be working in a 'smart' office in the next five years; compared to 52% of Gen X and 35% of Baby Boomers.
Smart offices	68% of American Millennials say they are willing to use AR/VR products in their professional life (compared to 55% of Gen X and 42% of Baby Boomers). 70% of Millennials agree that their job could be made easier with the assistance of AI (compared to 49% of Gen X and 34% of Baby Boomers).



