



The way we work 2019

Insights and perspectives on
the evolution of work



SENNHEISER

The way we work is undergoing an evolution

An introduction to the report

Over the last decade, we have witnessed an evolution in workspaces and the way we work. Working styles and preferences are changing, and technology continues to advance. As organizations fight to attract the most qualified employees, they put greater effort into making work environments healthier. They are also providing workers with more autonomy than ever before.

The way we work today is both global and mobile and this has led to an overhaul of the traditional work environment. Changing workstyles require changing workspaces, which must become equally flexible and facilitate mobility, collaboration, idea-generation and more.

Sennheiser aims to understand and help our clients at all times. This is why we have gathered insights from both external sources and our own recent research, in order to provide a report that explores work settings and the range of modern business workstyles and technology. Its aim is to translate knowledge about the way we work into perspectives and insights you can use to unleash your potential – whether as a business or as a professional.

Work is not static
– nowadays it's dynamic
and changes quickly.
Read the report and
discover the trends on
how we work today and
how we will work
in the future.



Work trends

The changing face of work

Looking at today's workspaces, professional needs and workstyles are changing at rapid speed. We see certain trends affecting the professional work landscape, and their impact will only grow in coming years.



The open workspace

Companies are increasingly adopting open-plan design, which offers both new benefits and challenges to office workers.



New ways to meet and collaborate

As companies encourage more human interaction and collaboration, this changes how employees meet, the types of meeting rooms they need and the technology used.



More flexible, mobile working

Today's modern worker wants the freedom to work flexibly and remotely, and developing technology will only advance this mobility further.



Consumerization at work

Work lives and private lives are merging, creating new standards and expectations for technology and devices that are used both at the office and at home.

Change is occurring at all levels

We have categorized these workspace trends from three different perspectives – workspace, workstyle and work device.



How workspaces are transforming

This is the macro level where we identify workspace changes from an organization's point of view, and look into those changes that affect the entire office environment, as well as the organizational culture. In short, we see change in physical terms.



How workstyles are changing

Here, we look at the changes from the employees' perspective, and how these affect the individual's way of working.



How this impacts work device needs and usage

At this final level we see how organizational and individual changes affect usage and preferences for working devices, more specifically focusing on audio solutions.

From closed offices to open spaces



The traditional office layout is often thought of as a mix of cubicles and private offices. However, in the last decade we have seen a transition to open-plan designs. These have become the new standard, changing the face of organizational work environments and impacting productivity.

Workspace transformations

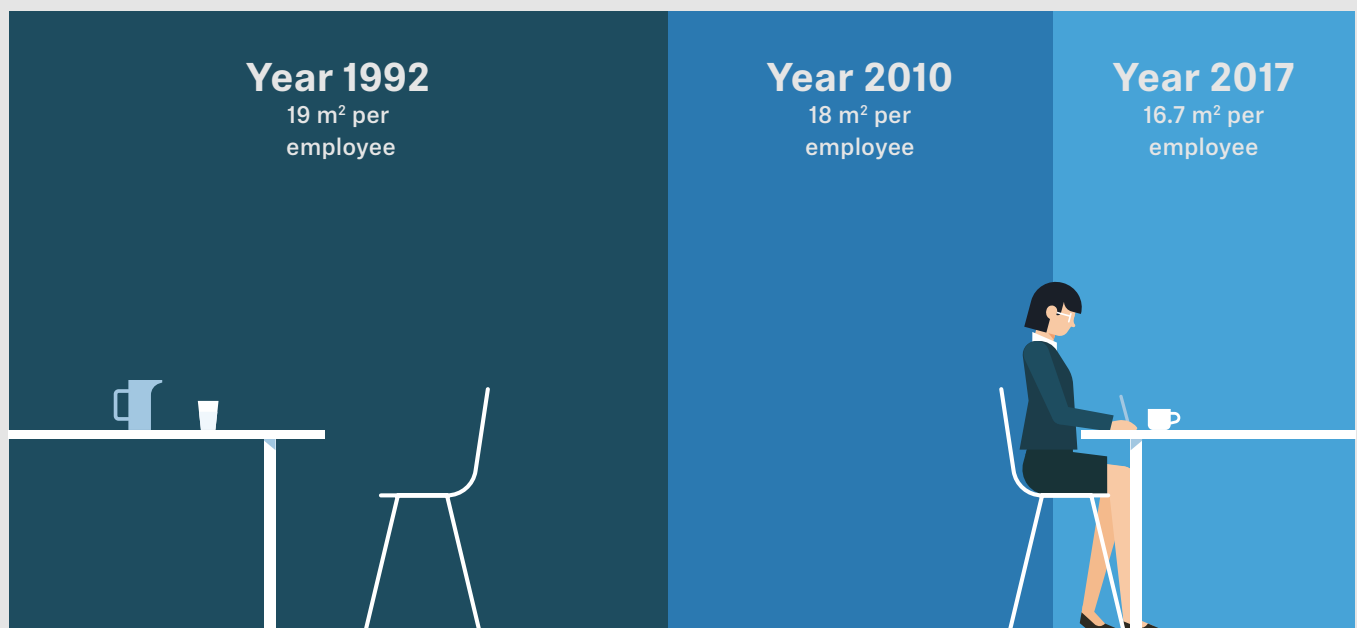
Rearranging office space

Today, open-plan offices make up around 70% of all U.S. workspaces. This environment creates new opportunities to foster employee interaction and boost creativity, but also presents new challenges.

Despite the good intentions in offering a more vibrant and open workplace, we are beginning to see a backlash against the concept. Studies show that open workspaces can result in 72% less time spent interacting in person, and instead workers are sending 56% more emails. Additionally, open workspaces often cause distractions, affecting focus and decreasing people's productivity up to 28%.

This workspace evolution has also resulted in increased noise levels and a decrease in the average space allocated to each employee.

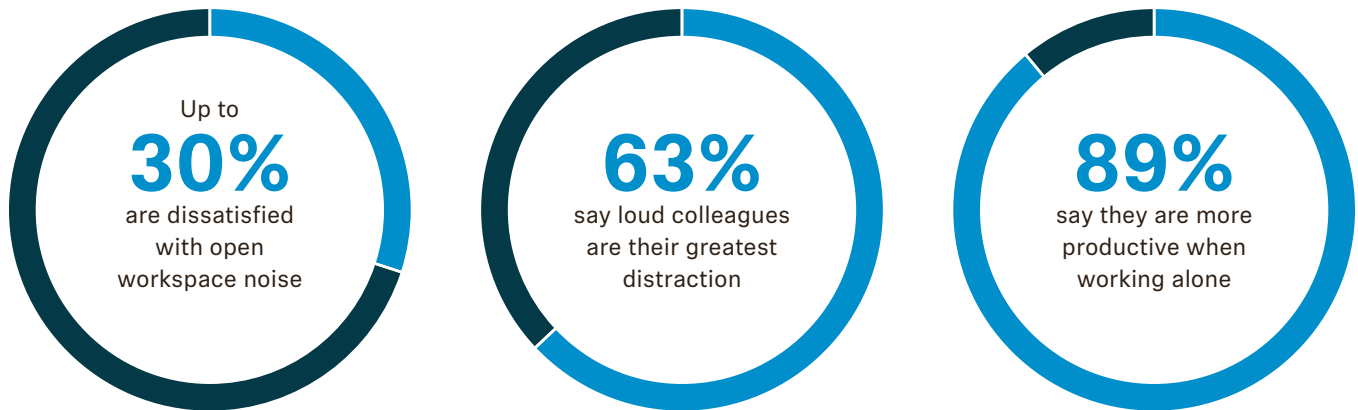
We are moving closer together



Workstyle changes

When office buzz becomes disturbing noise

Some of the main challenges of open-plan offices are sound levels and perceived lack of privacy. Without walls, the environment can become a cacophony of chatter, loud typing, email notifications and interruptions. These distractions make it difficult to focus and maintain productivity.

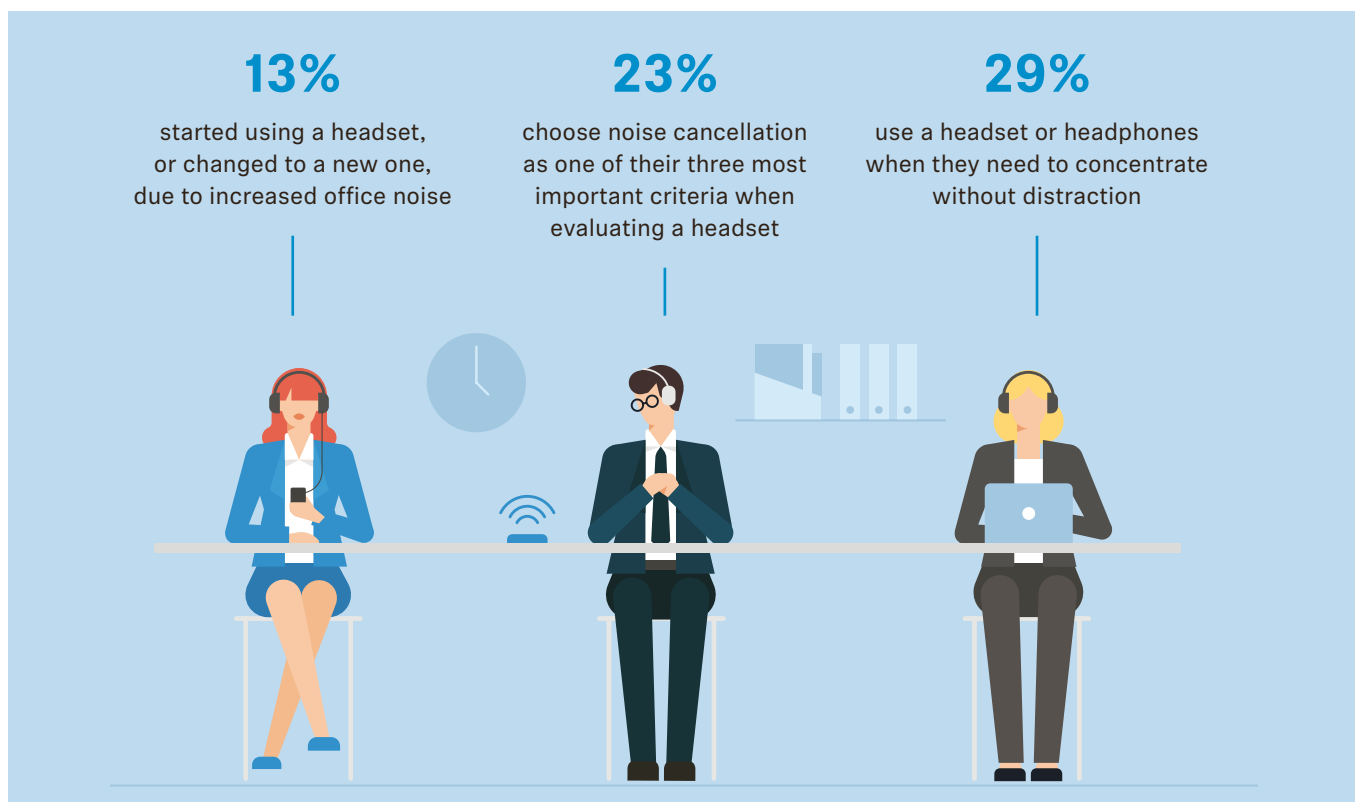


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Work device needs and usage

Increasing need for devices that enhance concentration

For many modern professionals, headsets are a common work tool. Increasing noise levels trigger the need for headsets to eliminate noise and aid concentration, causing noise cancellation technology to become integral to devices.



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Flexible workstyles are the new norm



Companies are designing workspaces for flexibility and to meet demands for remote working and connectivity. More and more, people are working both in and outside the office – and today, a great deal of work is done remotely. This is mainly due to technological devices becoming more versatile and multi-purpose in nature.

Workspace transformations

Flexible office design for every need

We see increased focus on flexibility in office space design. Dynamic workspaces, allowing many different workstyles, make employees feel as if they can more easily work on their own terms.



5x more

Innovative companies are **5x more** likely to have workplaces that prioritize individual and group workspaces

85%

85% expect to see an increase in mobility in the workplace through activity-based or agile workplaces



42.5%

42.5% of the global workforce will become mobile by 2022



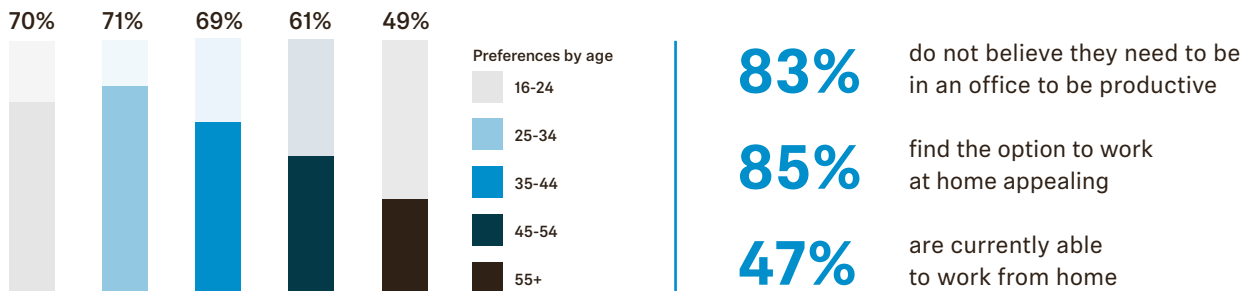
Workstyle changes

Working remotely will become an expectation

While workspaces become more flexible, the workforce is becoming more mobile. Today, 17% of workers have no fixed desk, and frequently or always work remotely. The ability to work flexibly and remotely will increasingly become an expectation from employees, especially as a new generation of young workers advance their careers. Working remotely will no longer be perceived as simply an added benefit.

Flexible working preferences (by age)

"I would like to be more mobile at work"

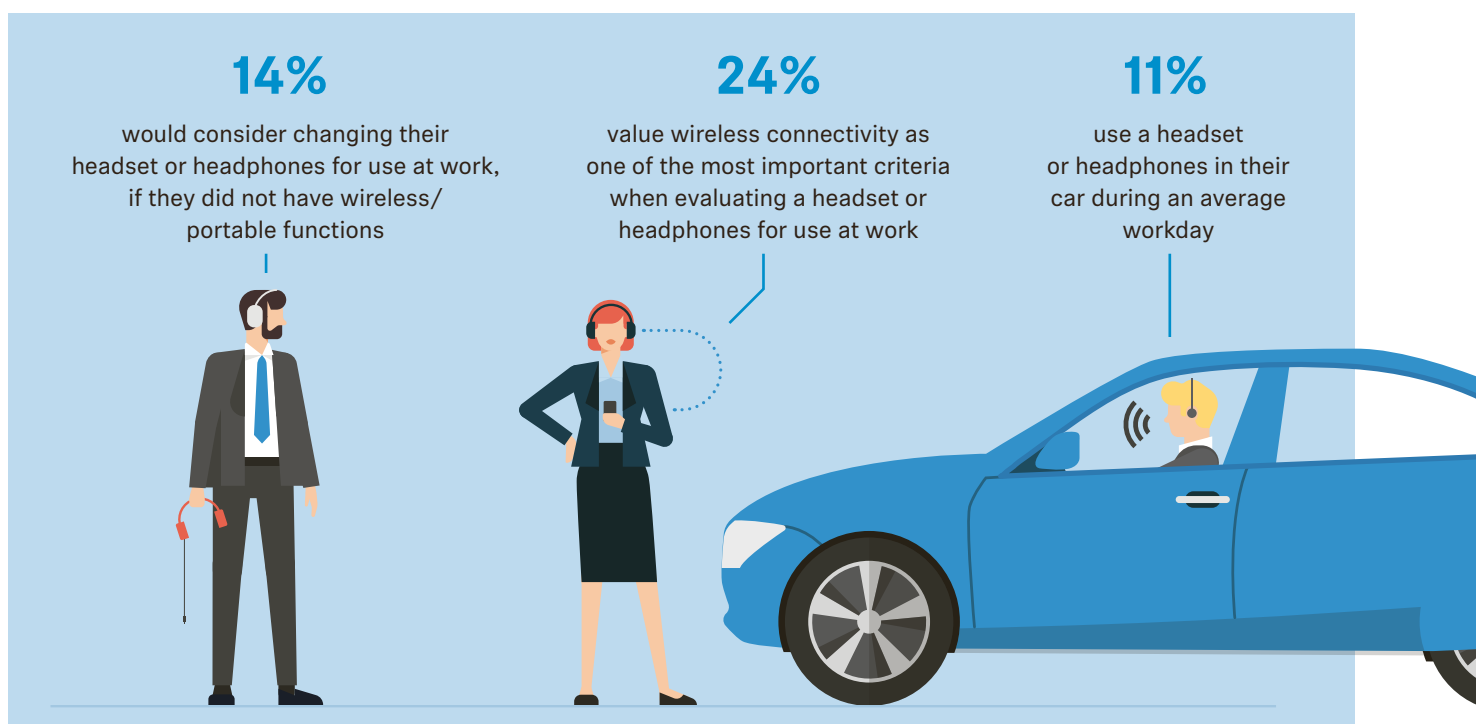


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Work device needs and use

Constantly connected with the right work tools

More people working remotely also means work devices are being used in more diverse ways and should be able to perform efficiently anywhere, anytime. This increases the demand for versatile, portable audio solutions that enable greater freedom through flexible connectivity options and device compatibility.



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Meeting spaces for interactive, dynamic collaboration



Having more employees working remotely also means that collaboration potentially crosses borders and time zones. This does not change the fact that people still need to be connected and work together – but it does mean that the nature of collaboration is changing, as well as the facilities that enable it.

Workspace transformations

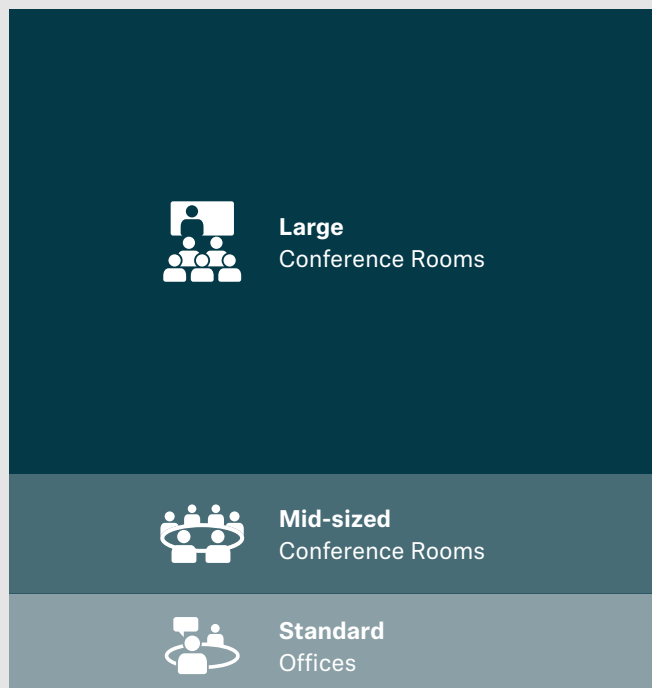
Smarter, smaller meeting rooms

In an open-plan office, workers need to be able to meet in a disruption-free setting and require rooms that can accommodate many types of meetings. This has led to a growth in smaller meeting rooms, especially the so-called “huddle” rooms, which are designed to support agile interaction and boost ideation. These can usually accommodate up to six people and are typically equipped with audio, video and display system technologies.

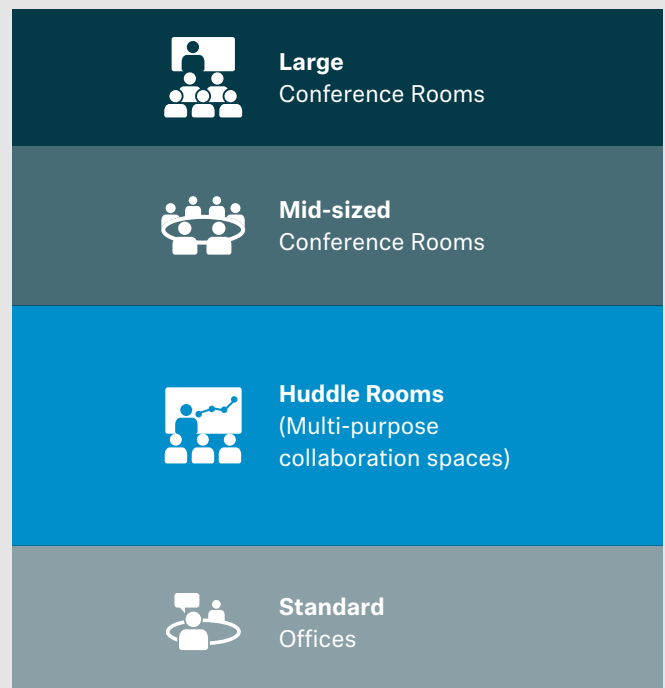
Key market drivers for huddle rooms

- Fast-growing population of remote workers reduces need for large conference rooms
- Growing number of open offices necessitates the need for smaller meeting spaces
- Exponential impact of tech-savvy millennials increases adoption of new technologies

Past



Future



Workstyle changes

The evolution of modern meetings

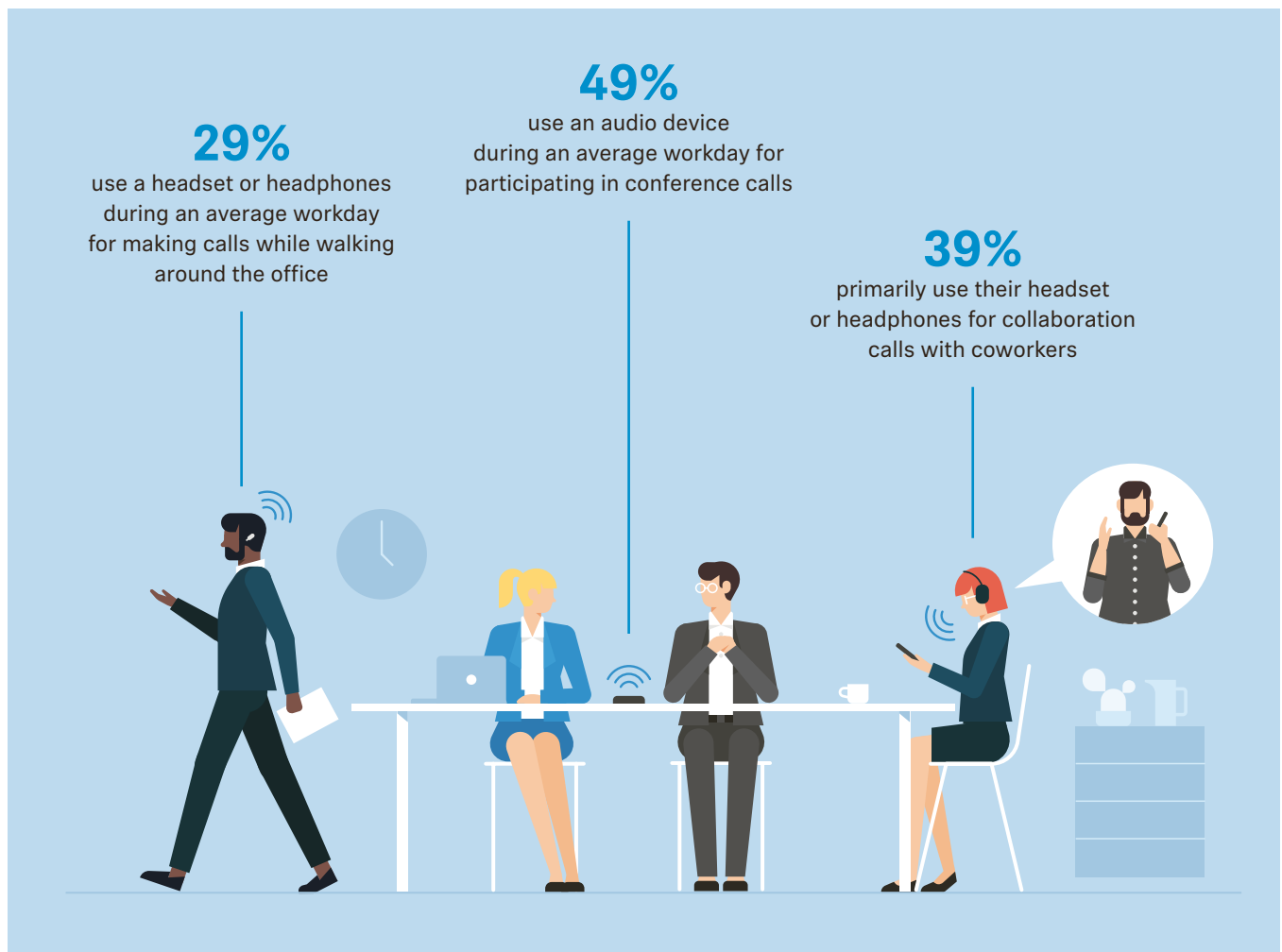
The physical changes to meeting rooms, such as the rise of the huddle room, are motivated by leaders' increasing encouragement of more human interaction. Companies continue to design workspaces that facilitate more interpersonal relationships between employees, and the way their meetings are changing:

- Meetings are becoming more frequent, shorter and less structured
- Meetings are becoming smarter and more intuitive, focusing on the user experience
- Meeting technologies are becoming single-source collaboration solutions

Work device needs and usage

Seamless collaboration tools are a top priority for IT

Constant connectivity, new kinds of meeting spaces and increased collaboration also mean new demands for audio solutions. Researching and ordering these solutions is often the responsibility of IT personnel. Research shows that 78% of IT leaders believe collaboration tools to be key in accommodating these workspace changes, as the use of technology for collaboration is so widespread.



Private and professional life is merging



















The work-life balance is changing and the boundaries for when to work, and when not to work, are blurring. As a result, workers desire quality technology and solutions that enable them to work productively at either place. Professionals need to be viewed as consumers, as their behavior, expectations and preferences are now the same.

Workspace transformations

Technology – an integrated part of the modern workplace

Businesses are soon to welcome a new disruptive wave of workers – the app generation. Having never known a world without smartphones or the Internet, these tech-savvy employees will set higher expectations for the flexible usage of technology at work. This will, in turn, place new demands on workspaces and work-issued devices, which will need to fit the many different ways employees want to work, interact and collaborate.

Workforce technology expectations

Business Leaders Baby Boomers (1946-1964)	Current Workers Gen X (1965-1980)	Current Workers Gen Y (1981-1999)	Future Workers App Gen (post-1999)
 LETTER  TELEPHONE  MEMO  ROLODEX	 EMAIL  PC  FAX  PEN	 EMAIL  LAPTOP  SMS  SMARTPHONE	 SMARTPHONE  APPS  TABLET  VIDEO



Workstyle changes

Enjoying the same standards at home and work

Technology has blurred the lines between professional and private lives. Employees can take work home with them, or work on the go or abroad, which makes it difficult to set boundaries between private and professional time. That's why integrating the comforts of home into the workspace and providing the employees with the best possible tools, will help them perform where and when they wish to.

Employees' demands on their work tools are no longer different from those for private use. They seek the same usability, accessibility and seamless integration at work as they would as private consumers.

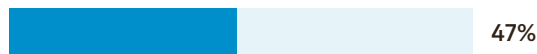
Work device needs and usage

Audio solutions need to perform anywhere

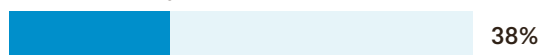
This merging of private and professional life, coupled with increasing mobility, also creates new demands for audio solutions. We see employees bringing their private headsets to use at work, while also using them at home for work-related activities. This means audio solutions need to be as mobile as those using them.

Top three values constituting a high-quality headset:

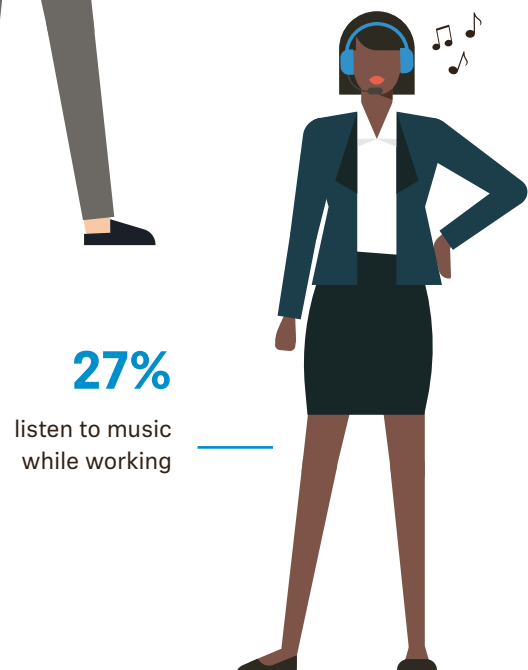
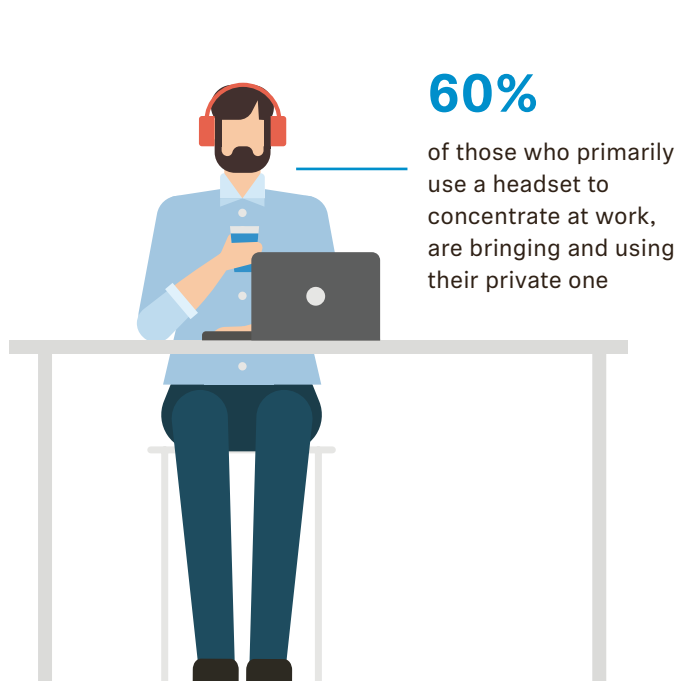
Exceptional sound quality



Good durability



Ability to cancel and eliminate noise





Key takeaways

What do these insights mean?

When you want to provide the best solutions, continuously gathering insights about workplace trends is crucial. Recognizing and responding to these trends – and their challenges – can help companies and their employees to improve workplace efficiency and wellbeing. So, what are the key take-aways?

Maintain positive dialogue between executives, IT responsables and employees:

Be aware of the differing workstyles and needs present at all the organizational layers. Higher levels need to take responsibility for listening and responding to those needs and be positive and open-minded about new technologies.

Ensure employees have the technology and integrated devices they need:

These needs will depend on the nature of the company. However, the general trend is an increased focus on how technological and integrated devices can make work easier and even play a crucial role in raising performance and attracting new talent.

Give employees the ‘quiet time’, spaces, and devices they need for focused work:

Employees need quiet time. Open offices have many benefits, but we cannot ignore the increasing challenge of noise-driven distraction. Audio devices can play a part in addressing this by helping to cancel out noise, allowing the employees to focus.

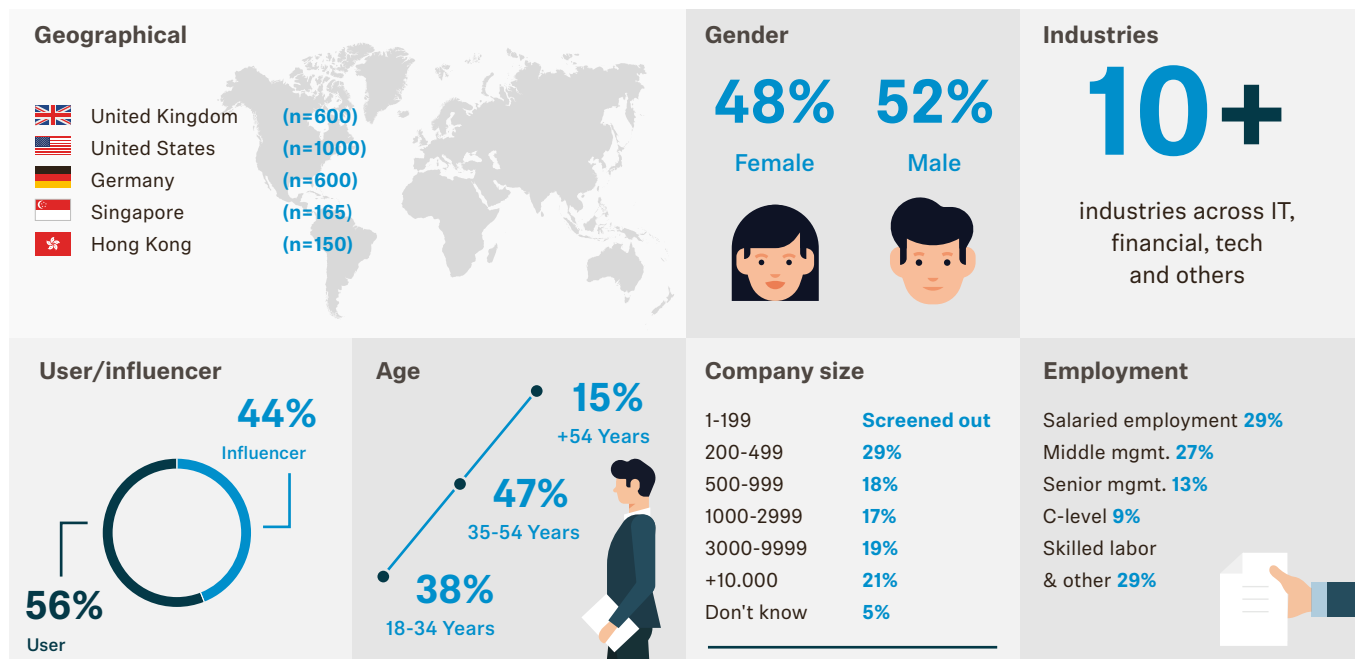
Boost employee productivity with the right audio solutions:

Companies want to improve employee productivity. This can be achieved with audio devices that help them focus, as well as supporting mobile and flexible workstyles, and enhancing collaboration. Thus, audio solutions have become a key working tool in boosting efficiency.

About the research

In 2018, Sennheiser surveyed more than 2500 employees in five countries from a range of industries and working at different employment levels in companies of varying sizes. The survey represents both “users” who are employees using audio devices without having any formal purchase responsibility, as well as “influencers” who use audio devices and have some sort of purchase responsibilities within the organization.

Sennheiser survey 2018 – the sample at a glance



External sources used in the report

Insights and data from external sources have been used throughout the report, and chosen according to which gave the most comprehensive insights on the different topics. See sources cited listed below:

Bernstein & Turban 2018. The Impact of the “Open” Workspace on Human Collaboration. Phil. Trans. R. Soc. B.

Fortune 2013. The three biggest workplace distractions.

Frost & Sullivan 2018. Growth Opportunities for Video Conferencing in Huddle Rooms, Global, Forecast to 2022.

Fuze 2017. Breaking barriers 2020 – Future of work.

NAIOP 2017. Trends in Square Feet per Office Employee: An Update.

CBRE 2017. WORK_IT. Technology | Workplace | Jobs

Gensler 2016. U.S. Workplace Survey 2016

Harvard Business Review 2013. Research: Cubicles Are the Absolute Worst

Haworth 2016. Designing for Focus Work

IFMA 2010. Space and Project Management Benchmarks. IFMA Research Report #34

Strategy Analytics 2016. Global Mobile Workforce Forecast Update 2016-2022

Unleash your potential and achieve more

Understanding how you work is how we help you work better

Businesses around the world are finding new ways to communicate and collaborate based on their individual needs and those of their customers. When talk matters, and where work knows no boundaries, we know that communication is essential to the success of your business. We pride ourselves on creating a better audio experience that helps you achieve more.

At Sennheiser, our users are at the heart of everything we do. Because to us, understanding the way you work is the first step to enabling you to work better. We aim to understand every detail about how people use our products, what they use them for and where they use them. That's why we have an audio solution for every one of our users' needs.



An audio solution designed for how you work

To match the requirements of office workers and the modern way of working we have organized our portfolio into three product series based on user needs: IMPACT, ADAPT and EXPAND.

To discover more about our product lines, visit www.sennheiser.com



IMPACT

When talk matters

For the professional who demands a perfect communication experience all day, every day. This line of premium audio tools is perfect for those who work in dynamic office spaces and spend long hours talking on the phone. These solutions are designed to improve efficiency and deliver excellent customer experiences.



ADAPT

Work your way

For the professional who demands versatility and flexibility. This range of premium audio solutions is for those who need to make flawless business calls from anywhere. Designed to enhance concentration and maintain focus, this series is ideal for noisy environments.



EXPAND

Seamless collaboration

For professionals who demand a seamless collaboration experience, no matter the location. Solutions in this line are specially designed to address the varying needs of those who collaborate in different workspaces, locations and time zones. Whether for large meeting rooms, smaller huddle spaces or for portable use on the go, there's a solution in this line to match your needs.

