

CONSUMERLAB



FLEXIBILITY IN WORK LIFE

An Ericsson ConsumerLab Insight Summary Report
June 2015

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METHODOLOGY

The data presented in this report was gathered from 47,167 interviews, representing 1.1 billion people in 23 countries across the world. These were: Argentina, Austria, Bolivia, Brazil, Canada, China, Denmark, Egypt, El Salvador, Germany, India, Italy, Japan, Mexico, Nigeria, Russia, South Africa, South Korea, Sweden, the UK, Ukraine, Uruguay, and the US. Interviews were conducted face-to-face and online, with consumers aged 15–69 years old.

The survey results were further complemented with on-device measurement data gathered from smartphone users in India, Japan, South Korea, the UK and US. On-device data was collected from 23,800 Android users, representing around 270 million Android smartphone users.



THE VOICE OF THE CONSUMER

Ericsson ConsumerLab has over 20 years' experience of studying people's behaviors and values, including the way they act and think about ICT products and services. Ericsson ConsumerLab provides unique insights on market and consumer trends.

Ericsson ConsumerLab gains its knowledge through a global consumer research program based on interviews with 100,000 individuals each year, in more than 40 countries and 15 megacities – statistically representing the views of 1.1 billion people.

Both quantitative and qualitative methods are used, and hundreds of hours are spent with consumers from different cultures. To be close to the market and consumers, Ericsson ConsumerLab has analysts in all regions where Ericsson is present, developing a thorough global understanding of the ICT market and business models.

All reports can be found at:
www.ericsson.com/consumerlab

ANY PLACE IS A WORKPLACE

Globally, the working population values the ability to enjoy life and to have fun as much as others. Consequently, they are adopting increasingly flexible lifestyles to allow for this.

More and more people around the world are choosing to work from multiple locations, requiring a greater need for technology-enabled flexibility. Having realized this, employers have provided devices such as mobiles or smartphones to over 24 percent of the workforce.



Employees want the ability to work anytime, anywhere

The ability to work flexibly means that currently, 20 percent of employees are already working from home during evenings, either because they prioritize time at home, or in order to handle the dynamics and requirements of their workplace better.

These factors are leading to a change in workers' attitudes towards how they use technology as a means of integrating their professional and personal lives.



KEY FINDINGS



A flexible life

- > 32 percent of the current workforce regard the ability to work remotely as important, while 43 percent place importance on working flexible hours. More than 20 percent work from home during the evening

Working on the go

- > A third of workers consider personal technology devices to be very important for professional purposes. Many among them feel that their use of these devices blurs the spatial boundaries between work and leisure time

Mobile phones preferred for work

- > The average time spent on mobile phones and smartphones for professional purposes is greater than the time spent on PCs, particularly in countries where personal mobile devices are generally considered less important for work

Apps enabling mobility

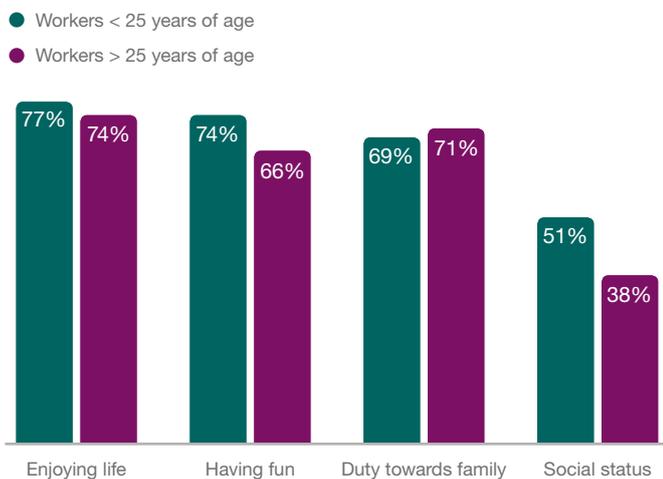
- > A higher proportion of the working population downloads apps weekly compared to the overall population. Of the average time spent on apps in a day, employees spend 20 percent of their time on business apps

TOWARDS GREATER FLEXIBILITY

Like the rest of the population, employees also expect to lead a life that provides a sense of purpose, with both long-term enjoyment and instant gratification. Individuality, moral obligations and having fun are considered more important than striving for social status.

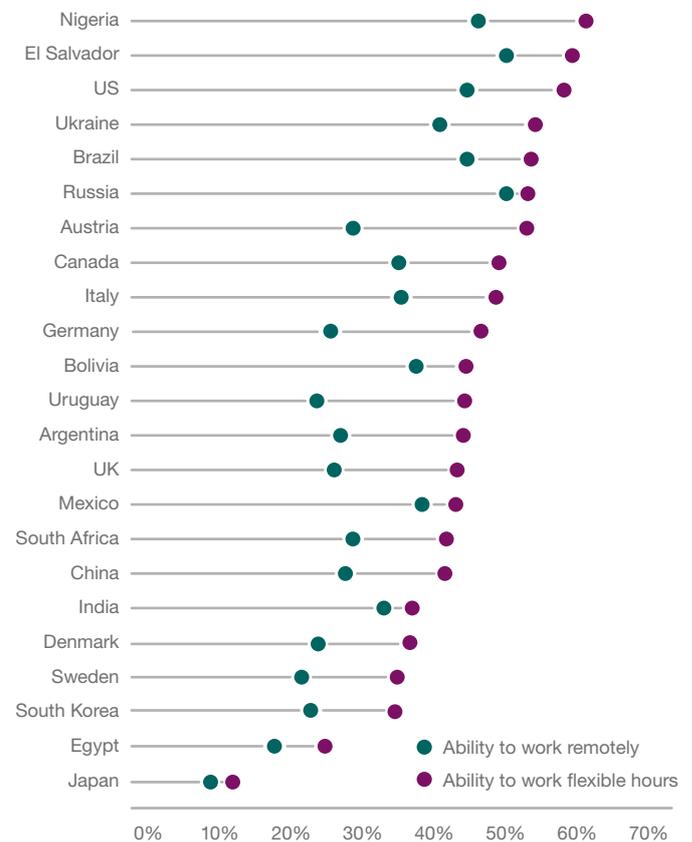
Figure 1 demonstrates that while enjoying life and having fun are a prominent focus for younger workers, they are generally as committed in their duty towards family and community as the older workforce. The younger workforce places a higher importance on social status than their older colleagues.

Figure 1: General attitude towards life – under 25s vs. over 25s



Source: Ericsson ConsumerLab, Flexibility in work life, 2015
Base: Global working population

Figure 2: Importance of ability to work remotely vs. ability to work flexible hours



Source: Ericsson ConsumerLab, Flexibility in work life, 2015
Base: Working population

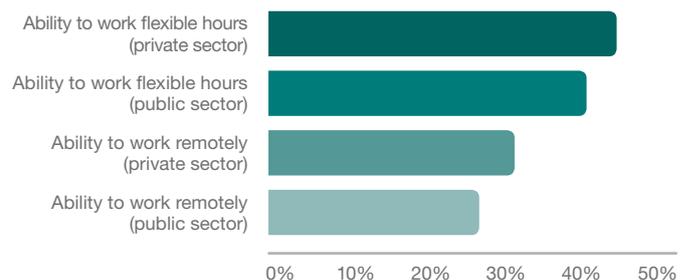
The aspiration for greater positivity and personal freedom in life directly influences attitudes towards work. Globally, a significantly larger proportion of employees desire flexible working hours than the ability to work remotely, as it provides greater independence (Figure 2).

In most countries, employees in the private sector feel a greater need for flexibility than those in the public sector – in terms of both the ability to work remotely and to work flexible hours (Figure 3).

As employees seek to work anytime, anywhere, the development and adoption of new technology and devices is also playing a role in blurring the boundaries between professional and personal lives. A third of the working population believe that personal technology devices are very important for work.

Among those who consider personal devices important for work, 36 percent agree that these devices have blurred the boundaries between professional and personal lives.

Figure 3: Ability to work remotely and work flexible hours – public vs. private

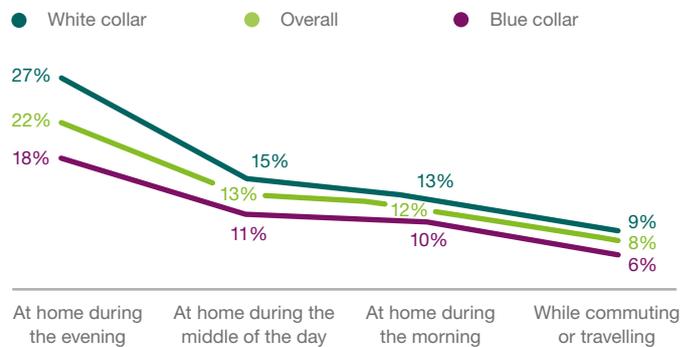


Source: Ericsson ConsumerLab, Flexibility in work life, 2015
Base: Global working population

While the majority works from a single location, a significant proportion of people, white collar employees in particular, work from multiple locations. Around 10 percent of white collar employees work while commuting or travelling. Among the overall working population, over 20 percent work from home in the evening which could be because they wish to prioritize time at home, or in order to handle the dynamics and requirements of their workplace better.

Thus, there is a need among the working population for a greater ability to manage their 'anytime, anywhere' lifestyles.

Figure 4: Proportion of people working from multiple locations, several times a week



Source: Ericsson ConsumerLab, Flexibility in work life, 2015
Base: Global working population

ENABLING MOBILITY

With employees needing to work more flexibly, there is an increasing need for employers to meet such demands. Employers have already provided devices such as mobiles or smartphones to over 24 percent of their employees.

Half of employees use their personal mobile phones for professional purposes, and spend an average of 32 percent of their time working on them. A third of employees use their personal desktops/laptops (PCs) for work purposes and spend over 30 percent of their overall time on these devices for work-related tasks.

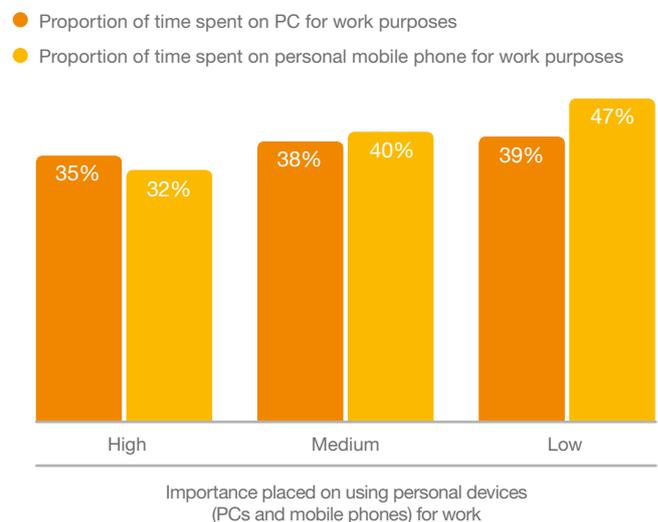
For our study, countries were categorized based on whether their workforce attached high, medium or low importance to using PCs and personal mobile phones for work.

In countries where lower importance is placed on using personal devices for work, the proportion of time spent on mobile phones for work (47 percent) is greater than the time spent on PCs (39 percent).

Conversely, in countries where a higher importance is placed on using personal devices for work, the share of time spent on mobile phones for work (32 percent) is less than the time spent on PCs (35 percent).

On average, irrespective of the device preferred for work, consumers chose to spend more time on their mobile phones. This suggests that the need for mobility is universal.

Figure 5: Of the total time spent on a personal device, proportion of time spent for work purposes



Source: Ericsson ConsumerLab, Flexibility in work life, 2015
Base: Global working population that feels personal devices (PCs and mobiles) are important for work



Half of employees use their personal mobile phones for professional purposes

THERE'S AN APP FOR THAT

As the time spent on mobile phones for work is gaining prominence, so are the perceived benefits of using mobile applications.

On average, 33 percent of the overall population download new apps to their devices at least once a week, and this figure increases to 43 percent among the working population. Of this, a significant proportion consists of white collar employees.

On a global scale, in many emerging economies there are more white collar workers who download apps than their counterparts in advanced economies.

Overall, US has the highest proportion of workers who download apps while Egypt has the lowest.

US 56%

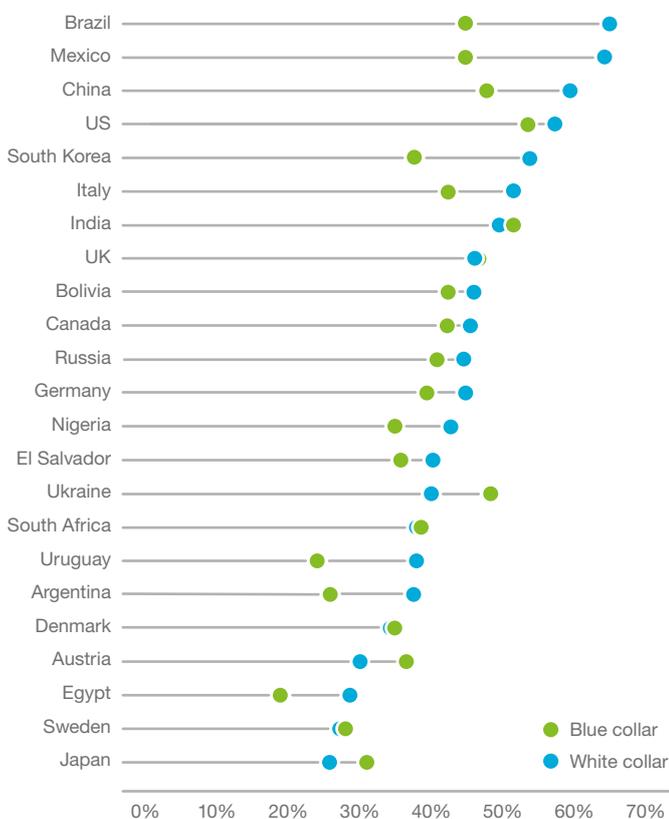
highest app download rate among workers



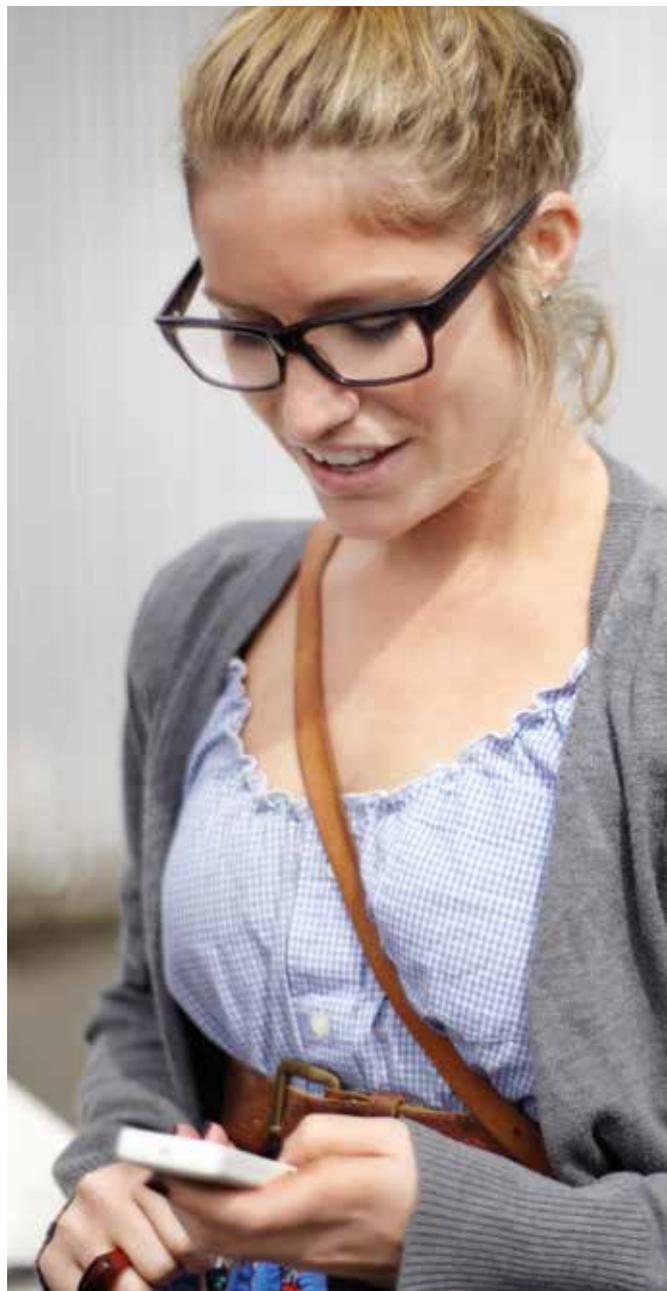
Egypt 27%

lowest app download rate among workers

Figure 6: New app downloads (on at least a weekly basis) by working population



Source: Ericsson ConsumerLab, Flexibility in work life, 2015
Base: Working population that accesses the internet



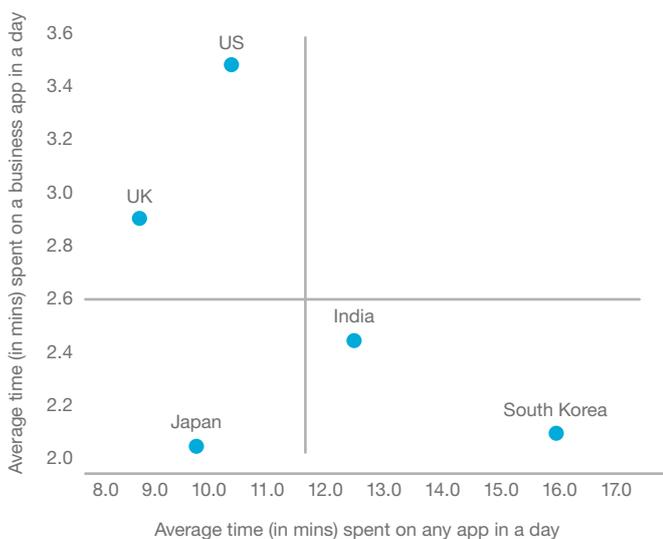
On a global scale, in many emerging economies there are more white collar workers who download apps than their counterparts in advanced economies



More workers are engaging in personal tasks at the workplace

Globally, we notice a general trend in the use of business apps. Of the average time spent on apps in a day, employees spend 20 percent of their time on business apps such as MS Outlook, Microsoft Lync and Polaris Office. For example, Figure 7 shows that in India, the average time spent on any single application in a day is around 12 minutes, with 2.4 minutes dedicated to business-related apps.

Figure 7: Time spent on business apps vs. general apps



Source: Ericsson ConsumerLab, Flexibility in work life, 2015
 Base: Global working population that uses the internet on their Android smartphone on a daily basis

Furthermore, mobile apps are being used for work in countries where the penetration of mobile devices such as laptops and tablets as a whole, is low. This shows that apps are recognized as adding value to work-related tasks and providing users with professional and personal interchangeability. This is especially true in emerging markets where blue collar workers are also swiftly adopting business applications.

The changing attitude of workers towards their personal lives and their need for greater flexibility impact how they access different services daily. For example, rather than commuting to single location offices, the workforce of the future will prefer to conduct video conferencing from different locations, using mobile phones provided by their employers.

At the same time, increasing numbers of workers are engaging in personal tasks at the workplace. 25 percent of both part and full-time employees who use the internet visit social networks such as Facebook and Twitter, and 12 percent shop online at work. Globally, workers are also downloading applications to their mobile devices for both personal and professional purposes.

These fundamental changes will inevitably influence how employers organize workplace policies in the future. Key considerations will encompass not only increased flexibility and agility in both work hours and place of work, but also employees' ability to use personal devices for work-related tasks and business devices for personal use.

Ericsson is the driving force behind the Networked Society – a world leader in communications technology and services. Our long-term relationships with every major telecom operator in the world allow people, business and society to fulfill their potential and create a more sustainable future.

Our services, software and infrastructure – especially in mobility, broadband and the cloud – are enabling the telecom industry and other sectors to do better business, increase efficiency, improve the user experience and capture new opportunities.

With approximately 115,000 professionals and customers in 180 countries, we combine global scale with technology and services leadership. We support networks that connect more than 2.5 billion subscribers. Forty percent of the world's mobile traffic is carried over Ericsson networks. And our investments in research and development ensure that our solutions – and our customers – stay in front.

Founded in 1876, Ericsson has its headquarters in Stockholm, Sweden. Net sales in 2014 were SEK 228.0 billion (USD 33.1 billion). Ericsson is listed on NASDAQ OMX stock exchange in Stockholm and the NASDAQ in New York.

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