OFFICE PROFESSIONALS
18+, Employed
Work with a computer daily
Millennials = 18-34 y.o.
Gen X = 35-54 y.o.
55+ = 55+ y.o.

HOW MANY
U.S.: 1,003
U.K.: 506
INDIA: 502

USA Margin of Error (MOE):
±3.1%
U.K. MOE: ± 4.4%
INDIA MOE: ± 4.4%
For statistical comparisons

WHEN
Apr 17, 2016 – Apr 24, 2016

HOW
20-Minute online quantitative survey
Key Findings
Eighty-one percent of U.S. office workers say state of the art technology* is important at work, outranking food and beverages (72%), a beautiful office design (61%) and on-site amenities (56%). (Page 9)

Only one in four (26%) U.S. office workers believes that their company’s technology is “ahead of the curve.” Indians are slightly more bullish (30%) while the U.K. is especially pessimistic (15%). (Page 10)

In the U.S., those who said their company’s technology is “ahead of the curve” love their work about twice as much and feel about twice as creative, motivated and valued compared to those at “behind the times” companies. (Pages 11)

Eighty-five percent of U.S. office workers say technology makes them more productive (93% in India, 76% in U.K.). (Page 12)

Almost 60% of U.S. office workers say that technology gives them the freedom to work where and when they want (64% in India, 54% in U.K.). (Page 13)

Seventy percent of U.S. office workers believe technology improves work-life balance (83% in India, 68% in U.K.), while 74% believe better technology would make their workday better and easier (91% in India, 64% in U.K.). (Page 13)

*Technology is defined as software, machines and devices
No really, people love to work

- Seventy percent of American office workers say they love their jobs. In India, people love work even more (83%) and in the U.K. somewhat less (60%). (Page 15)
- Indian office workers are the happiest and most flexible but also the most overwhelmed. (Page 16)
- For U.S. office workers, money to support themselves and their family plays a major role in why they work (88%), but they also want to be recognized as successful (60%) and to make an impact on society or community. (51%) (Page 17)
- Eighty percent of U.S. office workers would keep working even if they won the lottery and more than half (51%) would continue working in their current job. Almost all of those in India would work (98%). (Page 18)
- In all three countries, about three-quarters of office workers would rather work long hours doing the work they love than shorter hours doing work they don't enjoy. (Page 19)
- U.S. office workers work or think about work for almost half their waking hours (41%) on their days off (33% in U.K. and 63% in India) and three-quarters (78%) of waking hours on a typical work day (76% in U.K. and 84% in India). (Page 20)
- More than half of respondents in the U.S. (57%) and nearly half in the U.K. (46%) say work defines who they are, and that rises to 85% in India. (Page 21)
One in three U.S. office workers is moonlighting, i.e., has one or more jobs on top of their primary profession. In India it’s more than one in two workers and nearly one in four in the U.K. (Page 23)

Moonlighters in the U.S. are more likely to be optimistic (78% vs. 73%) and happy (78% vs. 72%) than non-moonlighters. (Page 23)

Other than money, pursuing a passion is the number one reason moonlighters have a second job. (Page 24)

More than half of respondents predict that multiple jobs will be the norm in the future (56% in US, 68% in India, 58% in U.K.). (Page 25)

Nearly 60% of U.S. office workers say they’re likely to leave their job for a new opportunity. Even half of the respondents who love their job would make the switch. (Page 26)

Forty-seven percent of U.S. office workers would move to their “ideal” job even for less pay. (Page 27)
• U.S. office workers predict that 53% of menial** office tasks will be done by a machine or technology in the next 20 years (61% in India; 53% in U.K.). (Page 29)
• More than 3 in 4 office workers (77% in U.S., 78% in U.K., 80% in India) believe public health will worsen as people become more attached to devices. (Page 30)
• More than 3 in 4 U.S. office workers (79%) believe relationships will suffer as people become fixated on devices (81% in India; 75% in U.K.). (Page 30)

• More than half of U.S. and U.K. office workers think their job requires human abilities and interaction that technology will never replace (55% in U.S., 60% in U.K.). (Page 31)
• On the other hand, 66% of Indian office workers feel that machines are likely to take over their jobs within the next 20 years. (Page 31)

** Menial office tasks include printing documents or making copies, filing/organizing documents, filing expenses, etc.
Tech is the New Perk
Technology wins over food, office design and on-site amenities

### Importance to Ideal Work Space

*Among US Office Worker Total – Showing Top 2 Box*

<table>
<thead>
<tr>
<th>Factor</th>
<th>US (%)</th>
<th>UK (%)</th>
<th>IND (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of the art technology for my work station</td>
<td>81%</td>
<td>70%</td>
<td>46%</td>
</tr>
<tr>
<td>Technology to help me connect with my colleagues more efficiently</td>
<td>81%</td>
<td>93%</td>
<td>78%</td>
</tr>
<tr>
<td>Access to food and beverage</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>Lounge and relaxation areas</td>
<td>63%</td>
<td>59%</td>
<td>46%</td>
</tr>
<tr>
<td>Personalized work stations</td>
<td>63%</td>
<td>83%</td>
<td>78%</td>
</tr>
<tr>
<td>Beautiful office design</td>
<td>61%</td>
<td>54%</td>
<td>86%</td>
</tr>
<tr>
<td>Access to on-site amenities</td>
<td>56%</td>
<td>41%</td>
<td>73%</td>
</tr>
</tbody>
</table>

Q32. How important are each of the following factors in creating your ideal work space?

Few office workers think their companies are ahead of the technology curve...

Technology in Primary Working Environment
Among US Office Worker Total—Showing % "Ahead of the Curve"

1 in 4
U.S. office workers (26%) believe their primary working environment is "ahead of the curve" when it comes to technology

- 15% in UK
- 30% in India

Q39. Thinking about the technology in your primary working environment, would you say it is... (As a reminder, by primary occupation we mean the job where you work most of your hours.)
Yet, people feel more positive if their company is “ahead of the curve” with technology

Feelings About Primary Job
Among U.S. Office Workers that See Own Company to be “Ahead of the Curve” vs. “Behind the Times” – Showing Top 2 Box

<table>
<thead>
<tr>
<th>Category</th>
<th>Ahead of the Curve</th>
<th>Behind the Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>Love their Job</td>
<td>85%</td>
<td>45%</td>
</tr>
<tr>
<td>Productive</td>
<td>83%</td>
<td>66%</td>
</tr>
<tr>
<td>Motivated</td>
<td>81%</td>
<td>42%</td>
</tr>
<tr>
<td>Valued</td>
<td>79%</td>
<td>41%</td>
</tr>
<tr>
<td>Creative</td>
<td>77%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Q39: Thinking about the technology in your primary working environment, would you say it is...
Q26: How do you feel about your current primary job? (1 to 5 scale). Shown 1+2, 4+5. Not shown: 3
Q23: How do you feel about your primary job?
Most office workers think technology makes them more productive

Technology's Role in the Workplace
Among US Office Worker Total—Showing Top 2 Box (Strongly + Somewhat Agree)

85% Of U.S. office workers believe technology makes them more productive

76% 93%
Technology makes the work day easier, improves work-life balance and offers freedom

Agree that better technology would make their work day better/easier
Among U.S., U.K, India Office Worker Total

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>U.K.</th>
<th>INDIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>74%</td>
<td>64%</td>
<td>91%</td>
<td></td>
</tr>
</tbody>
</table>

Believe technology improves work-life balance
Among U.S., U.K, India Office Worker Total

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>U.K.</th>
<th>INDIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>70%</td>
<td>68%</td>
<td>83%</td>
<td></td>
</tr>
</tbody>
</table>

Believe technology gives them more freedom to work when and where I want to
Among U.S., U.K, India Office Worker Total

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>U.K.</th>
<th>INDIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>58%</td>
<td>54%</td>
<td>64%</td>
<td></td>
</tr>
</tbody>
</table>

Q27: How much do you agree or disagree with each of the following statements about your work?
Q40: Which of the following most closely aligns with your opinion of technology in the workplace?
No Really, People Love To Work
Most people love their jobs

Feelings About Primary Job
Among U.S Office Worker Total – Showing Top 2 Box

70%
Love their job

60% 83%

Q23. How do you feel about your primary job? (As a reminder, by primary occupation we mean the job where you work most of your hours.) (1 to 5 scale, with 1 meaning absolutely hate it and 5 meaning absolutely love it). Shown: 4-5 love it. U.S. N: 1003, U.K. N: 506 IND N: 502
Indian workers are the happiest and most flexible but also the most overwhelmed.

### Adjectives to Describe Workers
Among U.S., U.K., and India Office Worker Total – Showing Top 2 Box

<table>
<thead>
<tr>
<th>Adjective</th>
<th>U.S. Total</th>
<th>U.K. Total</th>
<th>India Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Happy</td>
<td>83%</td>
<td>61%</td>
<td>76%</td>
</tr>
<tr>
<td>Flexible</td>
<td>74%</td>
<td>69%</td>
<td>76%</td>
</tr>
<tr>
<td>Optimistic</td>
<td>74%</td>
<td>58%</td>
<td>76%</td>
</tr>
<tr>
<td>Overwhelmed</td>
<td>30%</td>
<td>20%</td>
<td>44%</td>
</tr>
<tr>
<td>Disconnected</td>
<td>16%</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Q1: Please read the following series of adjectives which may or may not apply to you. After reading each one, please say how well each adjective describes you using a 1 to 5 scale, where 1 means it does not describe you at all and 5 means it describes you completely.

Although important, pay isn’t the only reason people work

Motivations to Work
Among U.S. Office Worker Total – Showing Top 2 Box

Q22. In terms of your current job, what motivates you to work? (1 to 5 scale, with 1 meaning not at all motivating and 5 meaning extremely motivating). Shown: 4-5 total motivating
Most people would keep working even if they won the lottery

If You Won The Lottery…
Among U.S Office Worker Total—Showing % Selecting

- **80%** of U.S. office workers would continue to work after winning the lottery.
  - 20% would stop working entirely.
  - 29% would pursue my dream career.
  - 23% would continue doing the job I currently have but work fewer hours.
  - 28% would continue doing the job I currently have in the same capacity.

- **51%** of U.S. office workers would stay in the same job.

In U.K., 67% of office workers would continue to work after winning the lottery.
In India, 98% of office workers would continue to work after winning the lottery.

Q35: If you won the lottery, would you... U.S. N: 1003, U.K. N: 506 IND N: 502
People would rather work long hours doing the work they love

In an ideal world, would you rather...
Among U.S. Office Worker Total – Showing % Selecting

- Work longer hours doing the work I love: 76%
- Work shorter hours doing work I don’t enjoy: 24%

Q34. In an ideal world, would you rather...
People obsess about work even on their days off

Percentage Waking Hours Spent Working/Thinking About Work | Day Off vs. Workday
Among U.S Office Worker Total – Showing % Reported

Q15. What percentage of waking hours on a typical work day do you spend on each of the following?
Q16. What percentage of waking hours on a typical day off do you spend on each of the following?
A majority in the U.S. and India are defined by their work

<table>
<thead>
<tr>
<th>Defines who I am</th>
<th>Neither defines me nor doesn’t</th>
<th>Doesn’t define who I am</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Total</td>
<td>U.K. Total</td>
<td>INDIA Total</td>
</tr>
<tr>
<td>57%</td>
<td>46%</td>
<td>85%</td>
</tr>
<tr>
<td>25%</td>
<td>30%</td>
<td>11%</td>
</tr>
<tr>
<td>18%</td>
<td>24%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Q21. How much do you feel your work defines who you are? (1 to 5 scale, with 1 meaning work doesn’t define who I am at all and 5 meaning it defines who I am completely)

Shown: 1-2 Doesn’t define who I am, 3 Neither defines me nor doesn’t, 4-5 Defines who I am

In Search of the Ideal Job
Moonlighting is more common than you’d think

Working Outside of Primary Occupation
Among U.S Office Worker Total – Showing % Selecting

1 in 3 U.S. office workers are moonlighting (33%)

MOONLIGHTERS’ ATTRIBUTES

Moonlighters are more likely to be happy (78%) and optimistic (78%) than non-moonlighters (72% and 73%, respectively)

Moonlighters are more likely to be happy (68%) and optimistic (69%) than non-moonlighters (59% and 55%, respectively)

Moonlighters are more likely to be overwhelmed (47%) and disconnected (16%) than non-moonlighters (39% and 8%, respectively)

S14: Do you do any work outside of your primary occupation to supplement your income or earn additional money?
Q1: Please read the following series of adjectives which may or may not apply to you. After reading each one, please say how well each adjective describes you using a 1 to 5 scale, where 1 means it does not describe you at all and 5 means it describes you completely.

Other than money, pursuing a passion is the number one reason to moonlight in the U.S.

**Reasons For Moonlighting**
*Among U.S Office Workers—Showing Top 2 Box*

- **To pursue a passion** (i.e., accountant by day, play in a band on weekends)
- **Networking opportunities**
- **To gain new skills to help me shift careers**
- **To obtain more experience within my current career trajectory**
- **To help others**
- **For fun**
- **Social interaction with other people**
- **Increased security of not being bound to one company**
- **Other**

In the U.S., 69% say earning more money is why they have more than one job (U.K. 57%, IND 70%).

In U.K., the number one reason for moonlighting other than money is “for fun” (27%).

In India, the number one reason for moonlighting other than money is to gain new skills (46%).

Q31. Why do you have more than one job?  
People predict that most will moonlight in the future

Impact of Changing Working Environments
Among US Office Worker Total—Showing % Selecting

- Most people will hold multiple jobs in the future: 56%
- Most people will have one job: 44%

58% (U.S.) 42% (U.K.)
68% (India) 32%
A majority is looking for a better opportunity

Likelihood To Leave Job For New Opportunity
Among US Office Worker Total– Showing % Reported

<table>
<thead>
<tr>
<th>Likely</th>
<th>Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>59%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Likelihood of People Who Love Their Job to Switch
Among U.S., U.K. and India Office Workers Who Love Their Job – Showing % Reported

<table>
<thead>
<tr>
<th>Country</th>
<th>% Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>50%</td>
</tr>
<tr>
<td>U.K.</td>
<td>47%</td>
</tr>
<tr>
<td>India</td>
<td>65%</td>
</tr>
</tbody>
</table>
Nearly half would move to their "ideal" job even for less pay

Q37 If you had an opportunity to move to your ideal job for less pay, would you do it?
Man vs. Machine: Who Wins?
Workers predict machines will take on “menial office tasks” in the future

Percentage of Menial Office Tasks* Done by Technology in Next 20 Years
Among U.S. Office Worker Total

Of menial office tasks will be done by a machine or technology in the next 20 years, according to U.S. office workers

53%

53%

61%
Attachment to devices will affect health and relationships

Working Environments In The Future
Among U.S. Office Worker Total – Showing Top 2

- 77% Say public health will worsen as people become even more attached to their devices and less active in the future.
- 79% Say we will be fixated on our devices and relationships with family, friends, and significant others will suffer.

Q52: Thinking about the future of technology in the work place, how much do you agree or disagree with each of the following statements? (Showing top 2)

- 78% 75%
- 80% 81%
U.S. and U.K. office workers don’t see technology as a threat to their job security; Indian workers disagree

Do you think your job in its entirety could be ever carried out by a machine?
Among U.S., U.K, India Office Worker Total

- **U.S. Total**: 10% Yes, today, 17% Yes, in the next 5 to 10 years, 18% Yes, but probably not for at least another 20 years, 36% No, my job requires ability and attributes that only humans possess, 19% No, in my role, customers prefer to interact with people over machines
- **U.K. Total**: 5% Yes, today, 14% Yes, in the next 5 to 10 years, 21% Yes, but probably not for at least another 20 years, 38% No, my job requires ability and attributes that only humans possess, 22% No, in my role, customers prefer to interact with people over machines
- **India Total**: 15% Yes, today, 27% Yes, in the next 5 to 10 years, 24% Yes, but probably not for at least another 20 years, 27% No, my job requires ability and attributes that only humans possess, 7% No, in my role, customers prefer to interact with people over machines

Indian office workers say their job could be carried out by a machine in its entirety in the next 20 years (66%)
Additional Insights: U.S. Millennials
Millennials are the most likely age group to leave their job if given the opportunity, and they feel more overwhelmed at work:

- Likely to leave their job: 66% of Millennials vs. 44% of 55+ and 57% of Gen X.
- Millennials are more than twice as likely to feel overwhelmed as those 55+ (37% vs. 17% of 55+ and 28% of Gen X).

More than any other age group, Millennials are motivated by having an impact on their society (58%)

- More so than Gen X (50%) or 55+ (33%), and they are also more motivated by being recognized as successful (Millennials: 68%, Gen X: 58%, 55+: 44%).
- Fifty-nine percent (59%) of Millennials say that their job defines who they are (vs. 50% of 55+, 58% of Gen X).

Millennials are more likely to hold second jobs than all other generations and spend more time working and thinking about work on days off:

- Have second job: U.S.: 38% Millennials; 31% Gen X; 23% 55+.
- More likely to have more than one job to help pursue their career – 26% work more than one job to obtain more experience within their current career trajectory (Gen X: 19%, 55+: 21%), 28% to gain new skills to help them shift careers (Gen X: 22%, 55+: 18%), and 33% for the networking opportunities (Gen X: 17%, 55+: 24%).
- Millennials spend 43% of their typical day off either actively working or thinking about work (Gen X: 41%, 55+: 37%).
- Millennials (87%) are the most likely generation to keep working after winning the lottery (Gen X: 80%, 55+: 61%).
U.S. Millennials (cont.)

Similar to other generations, technology trumps amenities and in-person communications are preferred:

- Eighty-one percent (81%) of Millennials say “state of the art technology” is important to creating their ideal workplace – more than onsite amenities and beautiful office design (importance of state of the art technology: Gen X: 82%; 55+: 77%).

- Millennials prefer in-person communication at work (Mill: 55%, Gen X: 55%, 55+: 62%). While 46% of US Millennial workers think their generation favors texting and IM, only 11% prefer to communicate this way at work.

- Millennials are the most likely to believe that their job in its entirety could be completely carried out by a machine / technology within the next 20 years (Mill: 53%, Gen X: 43%, 55+: 27%).

Millennials are more optimistic about the future compared to Gen X and 55+:

- 85% say they think their job situation will be better 5 years from now, compared to 75% of Gen X and 68% of those 55+.

- Millennials are most likely to believe the American Dream will be more achievable in the future (33%), compared to 26% of Gen X and 13% 55+. 
Appendix
In the U.S., most people love their jobs

Q23. How do you feel about your primary job? (As a reminder, by primary occupation we mean the job where you work most of your hours.) (1 to 5 scale, with 1 meaning absolutely hate it and 5 meaning absolutely love it). Shown: 4-5 love it.
Q26. How do you feel about your current primary job? (1 to 5 scale). Shown 1+2, 4+5. Not shown: 3;
U.S. N: 1003

Love their job

70%

Feelings About Primary Job
Among U.S. Office Worker Total – Showing Top 2 Box

Feelings About Current Primary Job
Among U.S. Office Worker Total – Showing Top 2 and Bottom 2 Box

- Unproductive: 7% (78% Productive)
- Not at all committed: 9% (72% Very Committed)
- Unsuccessful: 9% (67% Very Successful)
- Unmotivated: 13% (65% Very motivated)
- Not valued: 16% (65% Highly valued)
- Bored: 17% (56% Excited)
- Not creative: 19% (56% Creative)
- Poorly paid: 18% (54% Well paid)
- Very stressed: 28% (38% Not at all stressed)
In the U.K., people are happy with their jobs, but to a lesser degree

<table>
<thead>
<tr>
<th>Feelings About Primary Job</th>
<th>Feelings About Current Primary Job</th>
</tr>
</thead>
<tbody>
<tr>
<td>Among U.K. Office Worker Total – Showing Top 2 Box</td>
<td>Among U.K. Office Worker Total – Showing Top 2 and Bottom 2 Box</td>
</tr>
<tr>
<td>Love their job 60%</td>
<td>Love their job 60%</td>
</tr>
<tr>
<td>Unproductive</td>
<td>Productive</td>
</tr>
<tr>
<td>14%</td>
<td>64%</td>
</tr>
<tr>
<td>Not at all committed</td>
<td>Very Committed</td>
</tr>
<tr>
<td>10%</td>
<td>63%</td>
</tr>
<tr>
<td>Unmotivated</td>
<td>Very motivated</td>
</tr>
<tr>
<td>19%</td>
<td>55%</td>
</tr>
<tr>
<td>Unsuccessful</td>
<td>Very Successful</td>
</tr>
<tr>
<td>14%</td>
<td>51%</td>
</tr>
<tr>
<td>Not valued</td>
<td>Highly valued</td>
</tr>
<tr>
<td>21%</td>
<td>47%</td>
</tr>
<tr>
<td>Not creative</td>
<td>Creative</td>
</tr>
<tr>
<td>24%</td>
<td>46%</td>
</tr>
<tr>
<td>Bored</td>
<td>Excited</td>
</tr>
<tr>
<td>19%</td>
<td>44%</td>
</tr>
<tr>
<td>Poorly paid</td>
<td>Well paid</td>
</tr>
<tr>
<td>23%</td>
<td>42%</td>
</tr>
<tr>
<td>Very stressed</td>
<td>Not at all stressed</td>
</tr>
<tr>
<td>25%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Q23. How do you feel about your primary job? (As a reminder, by primary occupation we mean the job where you work most of your hours.) (1 to 5 scale, with 1 meaning absolutely hate it and 5 meaning absolutely love it). Shown: 4-5 love it.

Q26. How do you feel about your current primary job? (1 to 5 scale). Shown 1+2, 4+5. Not shown: 3.

U.K. N: 506
In India, office workers are especially positive about their jobs

Feelings About Primary Job
Among Indian Office Worker Total – Showing Top 2 Box

83%
Love their job

Feelings About Current Primary Job
Among Indian Office Worker Total – Showing Top 2 and Bottom 2 Box

Not at all committed 3% 79%  Very Committed
Unproductive 7% 75%  Productive
Unsuccessful 7% 73%  Very Successful
Not creative 10% 73%  Creative
Unmotivated 8% 72%  Very motivated
Not valued 7% 70%  Highly valued
Bored 11% 70%  Excited
Poorly paid 13% 61%  Well paid
Very stressed 21% 48%  Not at all stressed

Q23. How do you feel about your primary job? (As a reminder, by primary occupation we mean the job where you work most of your hours.) (1 to 5 scale, with 1 meaning absolutely hate it and 5 meaning absolutely love it). Shown: 4-5 love it.
Q26. How do you feel about your current primary job? (1 to 5 scale). Shown 1+2, 4+5. Not shown: 3.
IND N: 502
Work-life balance makes for an ideal work environment

**Important to an Ideal Work Environment**
Among U.S., U.K., India Office Worker Total – Showing % Very Important

<table>
<thead>
<tr>
<th>Factor</th>
<th>U.S. Total</th>
<th>U.K. Total</th>
<th>India Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good work life balance</td>
<td>64%</td>
<td>63%</td>
<td>66%</td>
</tr>
<tr>
<td>Clear direction</td>
<td>55%</td>
<td>60%</td>
<td>62%</td>
</tr>
<tr>
<td>Friendly coworkers</td>
<td>50%</td>
<td>53%</td>
<td>54%</td>
</tr>
<tr>
<td>Caring Boss</td>
<td>49%</td>
<td>42%</td>
<td>49%</td>
</tr>
<tr>
<td>Flexible hours</td>
<td>46%</td>
<td>42%</td>
<td>46%</td>
</tr>
<tr>
<td>Easy to collaborate with people</td>
<td>46%</td>
<td>43%</td>
<td>47%</td>
</tr>
<tr>
<td>Predictable hours</td>
<td>43%</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>Creative freedom</td>
<td>40%</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Ability to work from anywhere</td>
<td>40%</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Autonomy</td>
<td>34%</td>
<td>25%</td>
<td>31%</td>
</tr>
<tr>
<td>Minimal administrative tasks</td>
<td>32%</td>
<td>28%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Q33. And how important are each of the following factors in creating your ideal work environment?
People prefer to communicate in-person at work

Preferred Method of Interacting at Work
Among U.S Office Worker Total – Showing % Most Preferred

In person 56%
Over email 27%
Over an instant messaging system 7%
Over a phone call 6%
Over text message 3%
Over video conference 2%

In U.K, 58% of office workers prefer to communicate in person
In India, 56% of office workers prefer to communicate in person
Millennials prefer in-person interaction to screen time at work

**Preferred Methods of Interacting at Work: Perception vs. Reality**
Among U.S. Millennial Office Workers – Showing % Selecting Prefer Most

<table>
<thead>
<tr>
<th>Method</th>
<th>How U.S. Millennials actually prefer to communicate</th>
<th>How U.S. Millennials are perceived to communicate (by U.S. millennials)</th>
</tr>
</thead>
<tbody>
<tr>
<td>In person</td>
<td>55%</td>
<td>19%</td>
</tr>
<tr>
<td>Over email</td>
<td>26%</td>
<td>21%</td>
</tr>
<tr>
<td>Over a phone call</td>
<td>5% 10%</td>
<td>20% 8%</td>
</tr>
<tr>
<td>Over an instant message</td>
<td>4%</td>
<td>4% 27%</td>
</tr>
<tr>
<td>Over a text message</td>
<td>2% 4%</td>
<td></td>
</tr>
<tr>
<td>Over a video conference</td>
<td>2% 4%</td>
<td></td>
</tr>
</tbody>
</table>

While they believe others in their age group prefer text and IM at work, Millennials actually want in-person interaction.

In U.K., while 51% of millennial office workers prefer to communicate in person, 24% believe that their age group prefers in-person interaction.

In India, while 54% of millennial office workers prefer to communicate in person, 18% believe that their age group prefers in-person interaction.

Q17. How do you prefer to interact with people while working? Please rank the following from most preferred (1) to least preferred (6).
Q18. How do you believe different types of people most prefer to interact at work? Please select one option only for each type of person.
Pay is important, but better work and flexibility also drive job changes

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>More enjoyable work</td>
<td>33%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>More opportunity to work from home</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>More flexible scheduling</td>
<td>31%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Better work environment</td>
<td>26%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Fewer work hours</td>
<td>24%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>More recognition for my good work</td>
<td>22%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Better commute</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Better senior leadership/management</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>More challenging work</td>
<td>16%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Help others and/or society more</td>
<td>16%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Better boss</td>
<td>14%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Better business title</td>
<td>12%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>More likeable coworkers</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>More work hours</td>
<td>8%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Other than compensation...

- Work environment, especially important in India: 47%
- Fewer hours working, especially important in the U.K.: 29%

Q30. Which of the following factors would contribute to you wanting to switch jobs? (Multiple responses accepted)

BETTER COMPENSATION: #1 in all countries

- U.S.: 64%
- U.K.: 47%
- India: 56%
“The American Dream” is less achievable in the future

American Dream Outlook in The Future
Among U.S. Office Worker Total

- Less achievable: 40%
- Same as past: 33%
- More achievable: 27%

Q50: In the future, will the American dream be...? (Asked in U.S. only)
U.S. N: 1003
Successful workers will be collaborative and have diverse skills

Most Successful Workers of the Future
Among U.S Office Worker Total – Showing % Selecting

- People who work best alone: 33% (66%), 67% (70%)
- People who specialize in one area: 30% (68%), 70% (69%)

Q48. Who do you think will be the most successful workers of the future?