



Future Workplace Study

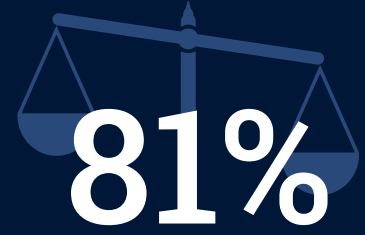
The State of Workplace Initiatives

Employee Mental Health is a Key Factor in Enterprise Hybrid Work Decisions

Prior to 2020, respondents reported 40% of staff working at least partly from home.

In 2020 workplace initiatives rose to a C-level priority; 70% of workers worked from home, requiring large, reactionary spend.

Since 2020, about 50% created a hybrid work policy and invested in tech to support hybrid work. 76% have achieved ROI in terms of productivity, cost, and employee & client satisfaction from a remote or flexible work policy.



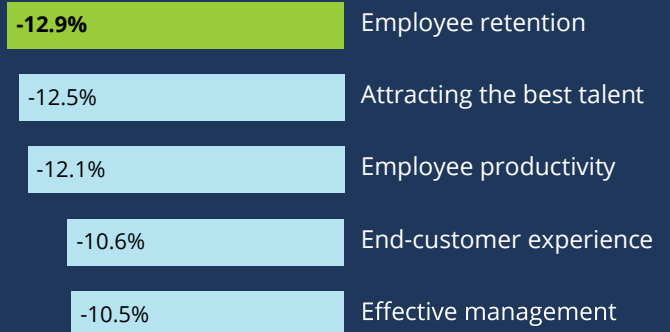
81% of respondents weigh mental well-being as extremely important to hybrid work decisions

Workplace services solutions need to address the relatively low confidence of respondents around the human side of their workplace compared to digital and physical workplace investments.

Enterprise Workplace Performance

Top 5 Gaps in Performance vs. Importance

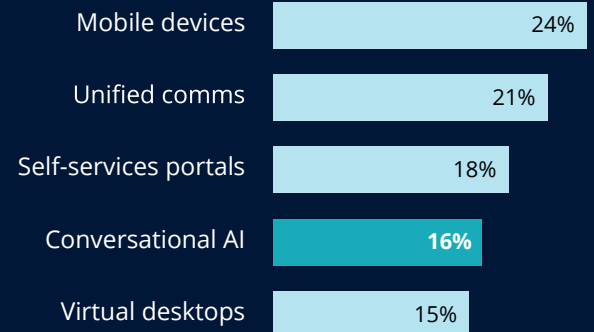
ISG looked at what respondents considered important in their workplace initiatives vs. their performance. Employee productivity and **attracting/retaining talent** were identified as 2 of the most important benefits of hybrid working – and where many feel they are behind their peers. Success is measured via IT cost and productivity metrics.



Technology Investments

Top 5 Workplace Technologies

To the right is the percent of respondents who consider each tech to be critical to their digital workplace in the next 2 years. Over two-thirds consider mobile devices, knowledge mgmt. tools and self-service portals as important, while specific industries focus on **emerging tech** like conversational AI and metaverse.

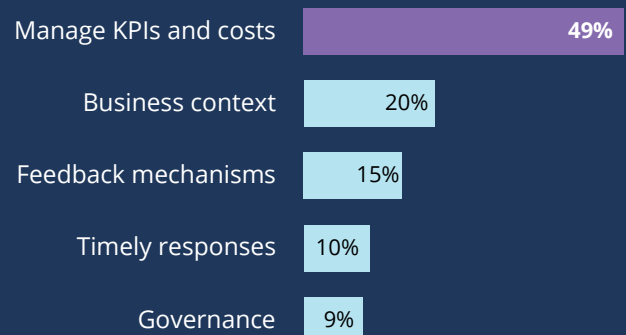


Note: Multiple responses allowed; will not add up to 100.

Workplace Partners

Top 5 Areas to Improve for Providers

The most common providers in this space are big tech firms and platform providers. Respondents believe providers most need to focus on **managing KPIs and costs** in their workplace outsourcing contracts to ensure positive outcomes. Impact to employee productivity is the number one consideration for choosing a provider.



Note: Multiple responses allowed; will not add up to 100.

208 executives interviewed
from US, UK, Germany, France, etc.

42% board-level roles
50% senior IT roles, 52% sponsoring initiatives

Contact us to learn more of the study's findings. If your organization needs help navigating the technologies, processes & culture needed to refocus your workplace initiative, ISG can help.