U.S. Mobile & Remote Worker Study

Industry Summary

InternetHomeAlliance

ZANTHUS

For more information, contact: **info@internethomealliance.com** or call 831.648.1001

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Mobile and remote workers account for a growing percentage of U.S. employees. Internet Home Alliance launched a comprehensive two-phase research study in July 2003 to better understand the needs of this population. The study focused on what the organization considers the core of the mobile and remote worker market—workers with Internet access at home who use a PC as part of their jobs at least 15% of the time and have some freedom to choose where they work during normal business hours. These workers are most likely to have a need for next-generation, Internet-dependent products and services. Based on the results of this study, conducted by Zanthus, an independent research based-consulting firm, there are approximately 20.1 million U.S. workers that fit this definition. Because of their technological savvy and relative freedom to choose where they work, these workers may be considered the heart of the larger base of mobile and remote population.

The first phase of the study consisted of a Web survey among 842 mobile and remote workers in the U.S., while the second was comprised of ethnographic or observational research among nine representative mobile and remote workers across three cities.

Key findings from the study include the following:

- Generally, the greater the degree of freedom workers have to choose where they work, the more productive they are given their particular workspace situation. Workers with "complete freedom" to select where they work spend significantly more time than those with "limited" freedom engaged in personal activities like running errands during normal business hours, but make up for this time by working more frequently outside normal business hours and during their commute to and/or from work.
- Self-employed workers tend to have the greatest freedom to choose where they work and among workers who aren't self-employed, managers and sales/marketing personnel tend to have the greatest freedom.
- Small companies—those with fewer than 100 employees—have the highest concentration of workers with "complete freedom" to choose where they work.
- Most mobile and remote workers are only marginally satisfied with the balance between their work and home lives. Workers with "complete" freedom to choose where they work are significantly more likely than those with less freedom to be "very satisfied" with their work-life balance. Few, however, appear to be gravely disappointed with this balance, indicating that the issue is a persistent, but not necessarily dire concern for most workers.
- Despite spending more time on work outside of normal business hours, self-employed workers are significantly more likely than those working for someone else to be "very satisfied" with their work-life balance. This finding is consistent with industry research that shows workplace satisfaction is not driven by pecuniary rewards so much as a sense of autonomy.
- According to many mobile and remote workers, the Internet and related technology is important to helping them achieve a desirable work-life balance. The Internet and related technology ranked third in importance, behind only making personal life more of a priority and making more money. This and other findings suggest workers' concerns about work-life balance can be alleviated to a large degree

through an intelligent application of technology, combined with progressive workplace management.

- Most mobile and remote workers consider their home office the one place outside of their primary workplace where they can be more productive than in the office. Customer or client sites allow many mobile and remote workers to be about equally productive as when they're in their primary workplace. All other out-of-office environments are considered less productive to a greater or lesser degree.
- If given greater freedom to choose where they work, a solid majority of workers (69%) indicate they would take it. The most highly anticipated benefits of more opportunities to work outside their primary workplace include being more productive, feeling better about their job overall, improved employee morale, decreased travel costs and downtime, and improved relationships with family and friends. The two most prominent concerns are that widespread mobile and remote working would complicate managing others and potentially, engender feelings of isolation.
- Self-described early adopters of new technology appear to be more likely than later adopters of technology to accept greater freedom to choose where they work.

To further refine the market opportunity, the Alliance has adopted a segmentation scheme based on four discriminating variables: relative mobility (or workplace freedom); workspace situation (assigned office space, telecommuting arrangement, etc.); mobile technology usage; and attitudes regarding work-life balance. The scheme is comprised of three distinct segments:

Remote Achievers

This segment accounts for about 45% or 9.1 million of the approximately 20.1 million mobile and remote workers that make up the core or primary market. They are more likely than other workers to have "complete" freedom to choose where they work and to be self-described early adopters of new technology. Accordingly, they have a higher propensity than others to use mobile devices and take advantage of mobile Internet options. They tend to skew younger than the other segments, with most under age 45. They are young, ambitious and focused on their careers, often to the exclusion of their personal lives-only about 36% indicate they're willing to make personal sacrifices to achieve a more satisfactory work-life balance.

Stress Avoiders

This segment makes up about 26% or 5.2 million "core" mobile and remote workers nationwide. At the risk of oversimplifying, Stress Avoiders may be characterized as hard-workers who plan to slow down. With a significantly greater percentage of workers in their peak earning years (45 to 54-years-old) compared to other segments, workers in this group are comparatively more focused on bettering their personal lives. For instance, they are prone to consider passing up assignments they consider "too demanding" as an important strategy for maintaining their work-life balance.

Office Achievers

This segment represents about 29% or 5.8 million "core" mobile and remote workers nationwide. Although these workers have at least "some" freedom to choose where they work, they're inclined to work in an assigned office space. They're significantly more likely than those in other segments to be employed in office management/clerical or other positions that don't readily lend themselves to mobile and remote work. Fundamentally, this group consists of workers who are generally happy to work in a relatively structured environment. They aren't strongly interested in looking for opportunities to work remotely, with the exception of occasional work from home.

The Remote Achiever segment constitutes the most promising target for companies in the mobile and remote worker market. This sizeable group is highly mobile, technologically-savvy and has the greatest interest in remote work environments outside of home. Through its ongoing pilots and projects, Internet Home Alliance is exploring new ways to meet the needs of this critical and fast-growing segment of U.S. workers. ■

Research Methodology

The research results cited in this summary are based on two distinct, but related research efforts: a Web-based survey of 842 mobile and remote workers; and ethnographic or observational research among nine representative workers across three cities: Portland, Ore., Houston, Tx. and Boston, Mass. Both phases of the study were conducted by Zanthus, a market research-based consulting firm headquartered in Portland, Ore. The results from the quantitative study have a margin of error of +/- 3.4% at the 95% confidence level. This means that the results come within plus or minus 3.4% of the results that would have been obtained given a census of all qualified individuals. Please note that individual findings may reflect smaller sample sizes.

About Internet Home Alliance

Internet Home Alliance is the leading cross-industry network of companies advancing the home technology market. A non-profit organization, the Alliance provides companies with the collaboration, research and real-world testing opportunities they need to launch their home technology products more quickly, successfully and cost-effectively. Members of the Alliance come from a variety of industries and include such leading companies as Best Buy Co. Inc., Cisco Systems, Inc., General Motors, Hewlett-Packard Company, IBM, Invensys, Microsoft, Panasonic (Matsushita Electric Corporation of America), SBC Communications, Sears, Roebuck and Co., Sun Microsystems and Whirlpool Corporation. For more information, visit www.internethomealliance.com.

About Zanthus

Zanthus is a market research-based consulting firm serving high-tech companies. Headquartered in Portland, Oregon, the firm provides research-informed strategic consulting as well as print, Web and product design services. The firm is particularly well-known for its commitment to reliable research methods and analytical techniques. For more information, visit www.zanthus.com.