Deloitte.

Digital collaboration
Delivering innovation, productivity and happiness

Contents

1. Introduction

In a world of ever increasing dynamism and mounting competitive pressure, European organisations face a significant challenge. On the one hand, a glut of new ideas and increasingly activist customers necessitates innovation throughout their operations; on the other, more dispersed, more powerful and less loyal workers demand higher compensation and a work environment that supports their personal and professional development.

Technology has a crucial role to play in enabling organisations to create an environment that supports the life goals of their employees but also harnesses their individual and collective creativity to create lasting economic value.

The next generation of enterprise productivity and collaboration tools, which encompass richer communications, document sharing and co-creation have a significant role to play in establishing this environment. Our research – which surveyed 3,600 employees of major European organisations – has shown that European workers are up to 20 per cent more satisfied with their workplace culture when they have access to these tools.

When combined with a culture that promotes innovation, collaboration tools lead to workers who are 34 per cent happier with their workplace culture than those who operate in an environment where innovation is discouraged and collaboration not catered for.

And yet the majority of people in large organisations still operate in the latter environment. Even in Sweden, which, according to our results, boast the most progressive employers, half of people work in a low innovation, low collaboration environment. In the UK, 65 per cent of employees are in this situation and just five per cent are fully enabled.

This is not a lack of understanding amongst workers. Overall, 56 per cent of people we surveyed use a social network at home, versus 12 per cent at work.

A third of employees have asked their managers for improved tools, but only a third of these received a positive response to their request.

For this reason, the adoption of digital collaboration needs to come from the top. Leadership by example remains a powerful force within organisations today, as is illustrated by the stories told by the business leaders we interviewed. They report increased engagement, improved morale and above all improved productivity when people used the tools they are familiar with from home in the workplace.

In the digital age, collaboration tools are a significant enabler of openness. Openness correlates to engagement, to innovation and most significantly to the happiness of the workforce that will be at the absolute core of European success in the decades to come.

2. Digital collaboration, productivity and happiness

We are social animals. And in 2013 we are digitally social animals. 56 per cent of the European workers we surveyed as part of our research into collaboration regularly use a social network in their personal lives.

It is therefore unsurprising that digital collaboration is fundamental to happiness at work. **Workers were 17 percentage points more satisfied with their workplace culture when they had access to effective digital collaboration tools**. Since studies also show that employee engagement can be worth as much as 19 per cent to the operating income of large enterprises,[1] improving engagement through collaboration could be a relatively simple way of enhancing business performance.
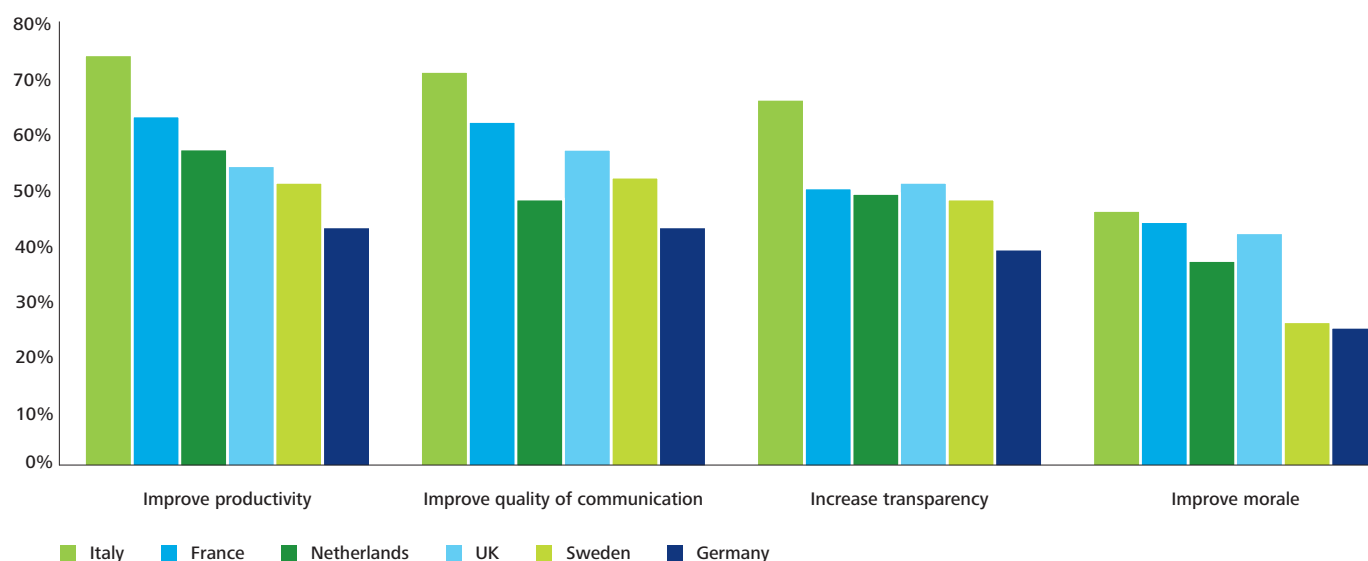
Today, digital collaboration tools are an important way of getting the best out of an organisation's talent. Globalisation has increased the geographical spread of many businesses while the economic downturn has forced teams to cut staff to reduce costs. This combination has dispersed skills and experience beyond the reach of face-to-face communications, at a time when businesses need more than ever to bring their best minds together. A senior executive we interviewed put it starkly: "if we don't harness the power of our global team, we won't get anywhere."

And it isn't just executives who see the benefits of digital collaboration. European workers recognise the benefits too, particularly as productivity enhancers and communications enablers.

As Figure 1 shows, German workers are the least likely to believe in the benefits of digital collaboration, which correlates with the fact that German respondents are the least likely to use social networks in their personal lives or to own a smartphone or tablet. Only 54 per cent of German respondents under 29 use a social network and on average only 34 per cent are members.

At the opposite extreme, Italian workers are the most likely to regard collaboration tools as beneficial. Fifty five per cent of Italians we surveyed belong to a social network, including 47 per cent of over 50s; **three quarters of all Italian respondents believe that digital collaboration tools would enhance their productivity**.

Figure 1. Proportion of respondents who agree that digital collaboration tools improve productivity, transparency, communication quality and morale

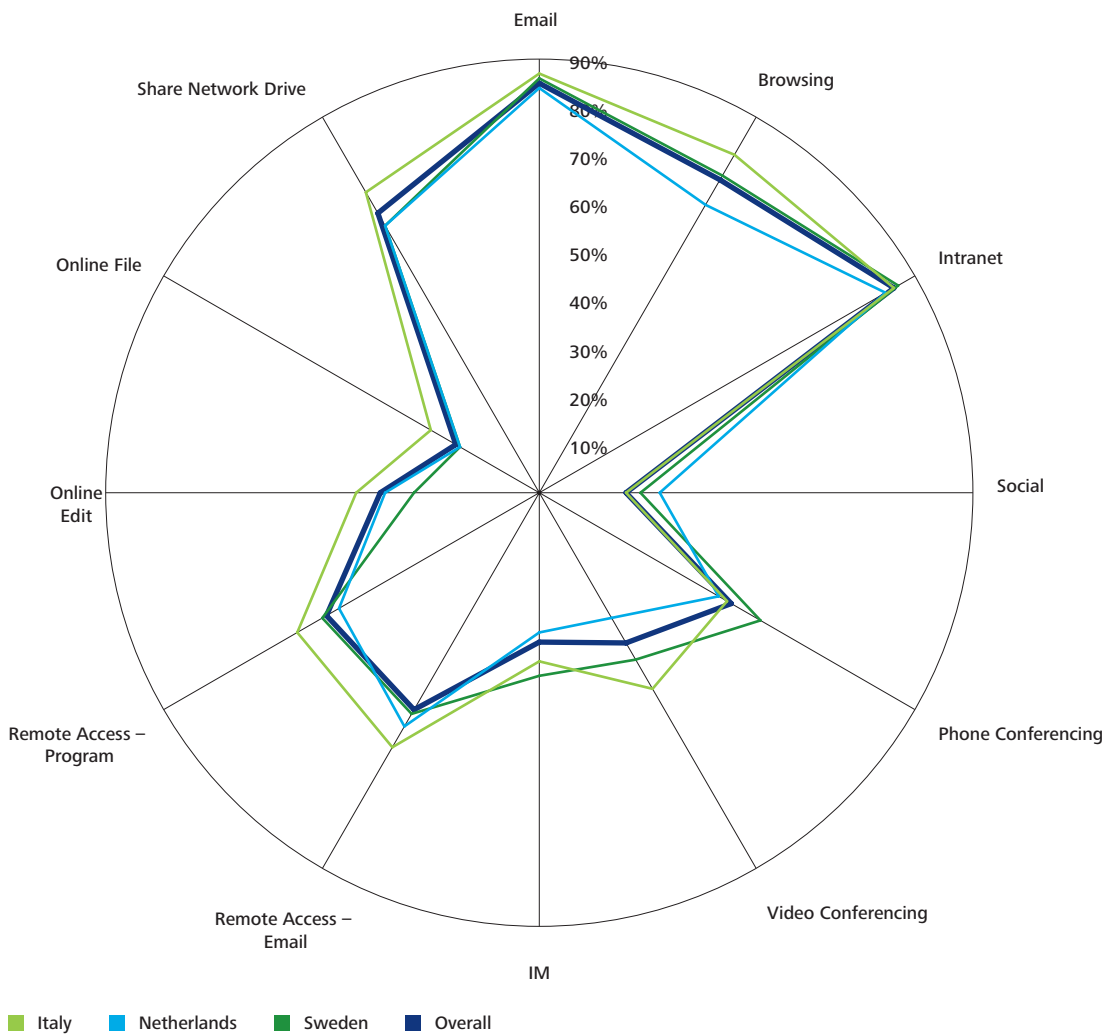Source: Digital Collaboration Survey, Deloitte/Ipsos MORI, June 2013

Base: All respondents (3,433)

As Figure 2 shows, Italian businesses are consistently the best at providing collaboration tools to their employees, which suggests that once used, digital tools are demonstrably valuable.

Elsewhere in Europe, Dutch workers are most likely to use a social network in their work processes, and the Swedes are the most likely to use phone conferencing day-to-day.

Generally speaking though, use of the second generation of collaboration tools such as social media, video conferencing, online file sharing and document manipulation is much sparser in the workplace than 1990s era collaboration and information access tools, such as email, intranet and web browsing.

Figure 2. Provision of digital collaboration tools, selected European countries

Source: Digital Collaboration Survey, Deloitte/Ipsos MORI, June 2013
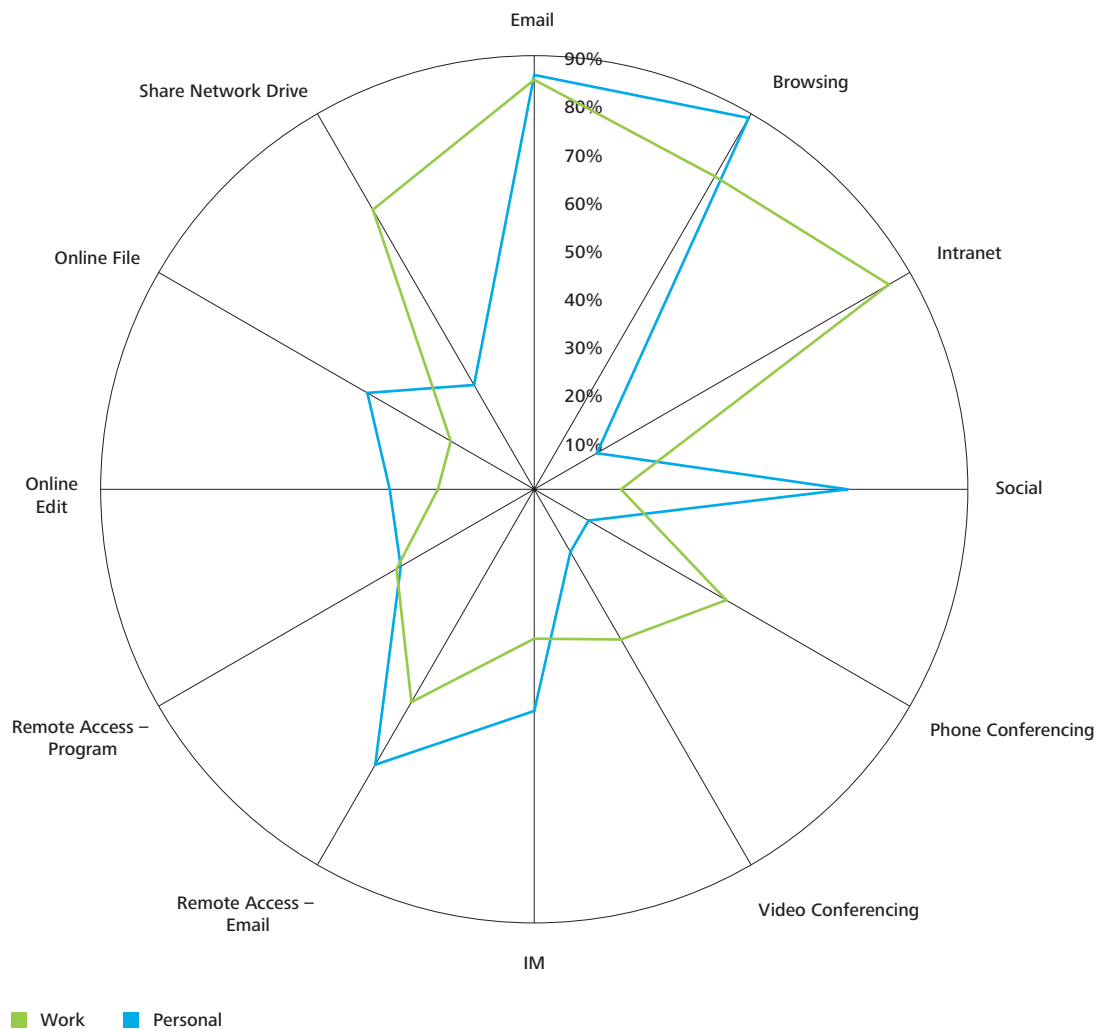
Base: Overall (3,433); Italy (604); Netherlands (380); Sweden (604)

Figure 3 shows the stark contrast between the impact of digital on workers' personal and work life.

Our interviews suggest that this lack of provision often reflects security concerns. Organisations are much more comfortable storing their confidential files and documents on systems they feel they have more control over than those stored remotely on web-based tools.

As one senior executive we spoke to explained, "when we first started investigating using cloud-based sharing tools, we were worried we were putting our data into an environment we had no control over, which we couldn't really monitor or report on. We embraced it because of the business benefits, and adapted our back-office function to meet our needs."

Figure 3. Comparison of use of digital collaboration tools in work and personal life

■ Work ■ Personal

Source: Digital Collaboration Survey, Deloitte/Ipsos MORI, June 2013

Base: Proportion of respondents that use digital collaboration tools (2,550)
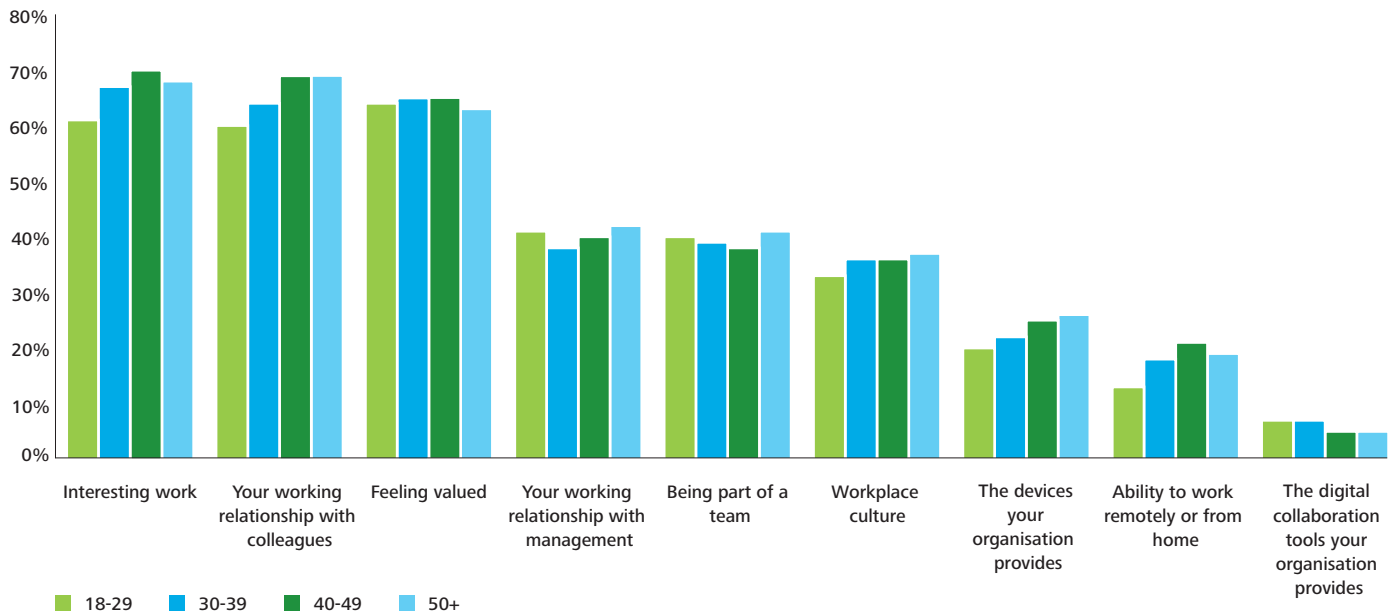
In light of the contrast between employees' experiences with digital tools in their personal and professional lives, many feel dissatisfied with the latter. **Just 9 per cent of respondents believe that their organisation has a very effective infrastructure for sharing and collaboration,** whilst an additional 39 per cent consider it to be somewhat effective.

There are many causes of this dissatisfaction: less than ten per cent of employees are satisfied with each of their devices, software and file storage tools. The relative failure of enterprise social networks, which just 12 per cent of employees use at work on a regular basis, compared with 54 per cent in a personal context, is a key example of how digital collaboration tools have not been engineered to meet user needs.

Digital collaboration tools are a tacit factor in making employees feel valued and happy in their jobs. Employees working in organisations that provided effective collaboration tools were 22 percentage points more likely to believe that their organisation cared about their morale.

Likewise, two thirds of workers who believe that their company has a culture of openness are working in an environment where the infrastructure for collaboration and information sharing is good versus only one third of those who work in a closed culture.

Figure 4. Factors contributing to employee satisfaction

Source: Digital Collaboration Survey, Deloitte/Ipsos MORI, June 2013

Base: All respondents split by age group: 18-29 (349), 30-39 (1,247), 40-49 (727), 50+ (1,110)

Strikingly, employees of businesses that provide second generation digital collaboration tools are nearly twice as likely to believe that their employer supports their professional development. Since our research shows that not feeling valued is the second most likely reason for workers to seek other jobs, this suggests that collaboration tools play an important role in staff retention. But today not enough organisations are embracing the second generation of enterprise collaboration and thus failing to unlock all of the latent value in their workers.
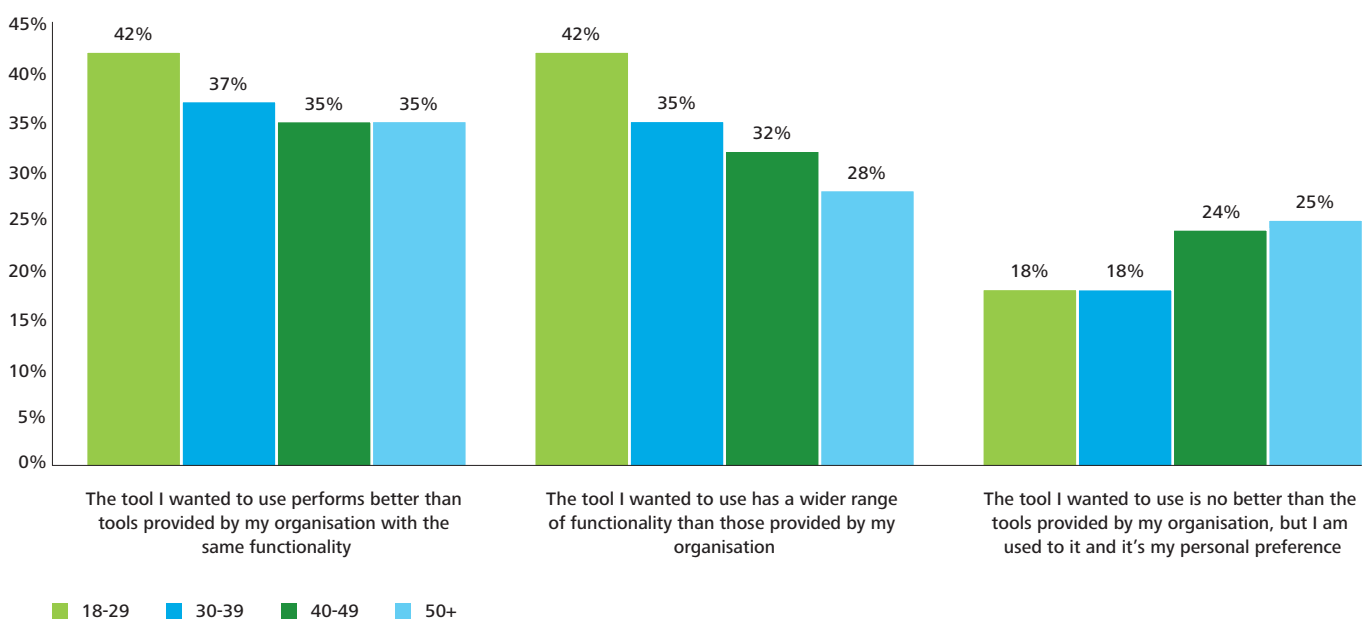
Lack of awareness is reflected by the relatively small number (36 per cent) of workers who have raised issues about digital collaboration with their managers and the still smaller proportion (14 per cent) who had asked managers for access to specific tools. Managers rarely respond positively to these requests. In only nine per cent of cases was a non-specific concern about collaboration tools addressed, although being specific with the type of tool required led to positive action being taken in 33 per cent of cases.

Improved education for employees and managers on the possibilities is evidently an important first step to encouraging adoption.

Managers who think that by denying requests for third party collaboration tools they are preventing their use may be interested that half of those who have had requests denied have started using the tools anyway. In total, 20 per cent of workers in our survey have chosen to take proactive steps and start using publicly available collaboration tools not provided by their employer. Although all employees are more likely to do this to gain new functionality that helps them in their role, it is notable that employees over 40 are significantly more likely than those aged under 40 to use a third party tool for the sake of familiarity rather than functionality.

In conclusion, our data shows that digital collaboration tools are an important aspect in promoting the happiness and productivity of European workers. In the next chapter we will show how they are also a key part in creating a culture of innovation.

Figure 5. Reasons why European workers use collaboration tools not supplied by their employer

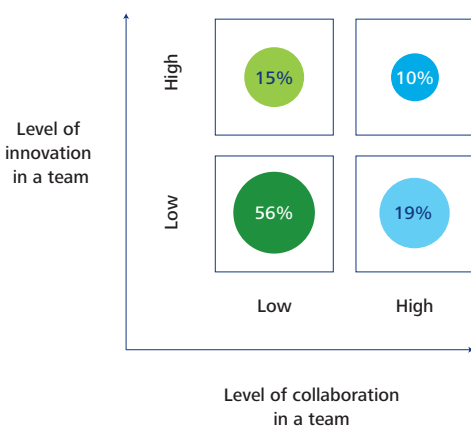Source: Digital Collaboration Survey, Deloitte/Ipsos MORI, June 2013

Base: Proportion of respondents that use collaboration tools at work not supplied by their employer split by age group: 18-29 (79), 30-39 (278), 40-49 (133), 50+ (163)

3. Digital collaboration and innovation

Although innovation is most often seen in the Steve Jobs mould of killer products that redefine industries, the reality is often far more prosaic. Innovations in processes to deliver incremental value are far more commonplace than silver bullets. Business change, be it due to an acquisition, a transformation of operating practices, or a change in strategic direction is also a process of innovation. It certainly feels radical to those employees that it affects.

Whatever its exact nature, innovation is seen as crucial to the future of European business. The European Union's Europe 2020 strategy states that: "with an ageing population and strong competitive pressures from globalisation, Europe's future economic growth and jobs will increasingly have to come from innovation in products, services and business models. This is why innovation has been placed at the heart of the Europe 2020 strategy for growth and jobs." Most national governments across Europe now have departments or strategic initiatives aimed at generating and supporting the development of innovation.

Although it is not a universal truth that the most innovative organisations are the most collaborative, those that do not enable the cross-pollination of skills and experiences between their employees are clearly failing to maximise their returns from their investment in those people. At a team, group and organisational level, we believe that organisations should maximise their ability to collaborate and create an environment in which innovation can flourish.

"We need to connect everyone in order to innovate. We want to be very diverse. There is an unwritten rule that the more diverse we are, the more chances we have to innovate."

Global Innovation Lead, Fortune 500 company

Figure 6 shows the results of our research: **56 per cent of employees in the six European markets we surveyed operate in an environment where there is little collaboration or innovation,** with the remainder predominantly working in teams that are either innovative or collaborative, but not both. Only ten per cent feel that they are in organisations that enable them to excel at both.

Figure 6. Proportion of respondents classified by the level of innovation and collaboration in their team

Level of innovation in a team

High: 15%, 10%
Low: 56%, 19%

Low / High

Level of collaboration in a team

Source: Digital Collaboration Survey, Deloitte/Ipsos MORI, June 2013

Base: All respondents (3,433)

The UK has the highest proportion of employees in the low collaboration, low innovation category: a concern, given strong statements by the UK Government on the need for innovation as a driver of economic growth.[2] **Swedish employees stand out for innovation, and the Dutch and the Italians for collaboration** in the workplace, reflecting relatively good access to tools and employee engagement in these markets.

The UK result is particularly unexpected as the country has historically been an early adopter of technology, second only to the US and in some aspects advanced Asian markets. Many commentators rank the UK – and particularly London – as Europe's most innovative location for digital.[3] It is possible that when reporting on their own innovativeness, British respondents focus on the silver bullets they've not produced and therefore rank themselves relatively poorly.

In any case, the effects of creating a collaborative and innovative workplace are demonstrated by the overall effectiveness of employees who operate in an environment that gives them the opportunity to do both. First and foremost, these employees are the happiest. Two thirds of employees who are highly innovative are also high satisfied with the culture of their organisation, versus an average of 38 per cent of all respondents.

Highly collaborative and innovative employees travel less to meet colleagues, using tools like instant messaging and video conferencing nearly 50 per cent more often than other groups. Interestingly, as innovators become innovator-collaborators, they rely less on face-to-face meetings and are more likely to use these kinds of digital collaboration tools. This suggests to us a virtuous cycle, whereby digital collaboration can support innovation, which itself encourages new thinking on the need for and the means of collaboration. The result is a movement away from a narrow definition of collaboration as interaction based on proximity to one that encompasses many different forms of sharing and collective working practices.

Digital collaboration tools also contribute to innovation. 60 per cent of those employees who believe that their organisation provides good digital collaboration tools also believe that the organisation is innovative, versus 32 per cent in organisations without good tools.

In the following chapter we will look at actions that leaders can take to change their organisation to unlock the latent value in their employees.

Figure 7. CI Matrix placement by country

	Low Collaboration – Low Innovation	High Collaboration – Low Innovation	Low Collaboration – High Innovation	High Collaboration – High Innovation
France	54%	16%	21%	10%
Germany	62%	17%	11%	11%
Italy	52%	23%	12%	13%
Netherlands	54%	24%	13%	8%
Sweden	50%	18%	20%	12%
UK	65%	18%	12%	5%
Average	56%	19%	15%	10%

Source: Digital Collaboration Survey, Deloitte/Ipsos MORI, June 2013

Base: All respondents split by country: France (620), Germany (619), Italy (604), Netherlands (380), Sweden (604), UK (606)

4. How to build more effective innovation and collaboration into the workplace

Our interviews have shown that managers can take a number of steps to enable innovation and collaboration in the workplace. We have summarised these activities into a number of actions that managers can take to unlock the latent potential in their organisation.

However, a word of warning; innovation and collaboration are social activities, which means that the conditions in an enterprise may render some of the initiatives we suggest less useful. Sadly it is not as simple as making people communicate and hoping that innovation ensues.

But in embracing some of the ideas that we have gleaned from our interview programme and from our experience, and listening to the mood of colleagues, we believe that all managers can create the conditions for innovation within their organisation without necessarily making formal changes to the way it operates.

The importance of cohesion

The creation of social cohesion is at the core of success for managers in this environment. Employees that collaborate the most are happier and are more cohesive in teams than other workers. Highly collaborative employees are 17 per cent more likely than low collaboration workers to feel that their new ideas are valued.

Cohesive teams are more productive, particularly where skills are complementary; they also make better decisions as they have a stronger basis on which to solve tricky problems.

Cohesive teams start with social connections that create trust. Unfortunately the distributed nature of workplaces means that the connections workers make are more difficult to sustain and develop in a way that leads to new ideas being transferred across the organisation. This is also a problem when assembling project teams, as many key skills may be hidden from view of the manager commissioning the work.

Cohesive teams are more productive, particularly where skills are complementary; they also make better decisions as they have a stronger basis on which to solve tricky problems.

Worse still, blocking of social networking websites, restrictions on the installation of new software to corporate-issue devices, and poor access to Wi-Fi in the office environment actively discourages the use of cloud-based services in the workplace. This is the digital equivalent of having to work in total silence.

Using collaboration tools for openness and collaboration

"It's really hard to sell innovation to Boards and executives, because innovation involves breaking the rules and taking risks" one of our Executive interviewees told us. This attitude is not a surprise as more than half of respondents to our survey said that their organisation does not value new ideas; a quarter of respondents told us that innovation is actively discouraged.

Attitude to risk is often the barrier to innovation, particularly in organisations where employees are typically required to produce a well-defined output using well-defined inputs. This can be as prosaic as producing an invoice or as complex and skilled as fixing a faulty piece of equipment. Teams operating in this way are often held accountable for performance over short timescales.

Output-based thinking is the antithesis of innovation in that it disincentivises trial and error in favour of consistent process execution. In this environment it can be inadvisable for an employee to socialise the fact that he or she has spent time pursuing new ideas. The local and digital collaboration tools that help foster collaboration suddenly become seen as a way for management to keep tabs on employees; social pressure acts to force people to execute their part of the process efficiently in case they let the team down.

There is also a need for managers to trust that good ideas can be found throughout their team. This is the 'suggestion box' idea that has been part of customer-facing businesses for many years. Anonymity is the core advantage of the suggestion box. If you suggest a 'bad' idea then no one will ever know that it was you. There is no lasting damage.

Suggestion boxes are easy to implement at all levels. As one interviewee in a major multinational put it: "people are sceptical about innovation right now but we are building a trust culture: letting people know that we are here to listen and here to action their suggestions."

For employees, trust comes from the top. In many organisations the messages from top executives are filtered through layers of corporate communications. Over-sanitising what is said and reducing the frequency at which leaders demonstrate their own freedom of speech can lead employees to believe that they too should be careful and guarded in their opinions.

One of the great advantages of the second generation of digital collaboration tools is that they are built to enable a higher frequency of shorter, but perversely, more engaging contact between people. Emails are too similar to a press release to be seen as anything other than a broadcast propaganda communication. Online meetings and enterprise social networks and other tools are more natural as they are multi-directional – everyone is expected to have their say, but are somewhat protected from the social awkwardness of standing up in a rare 'town hall' meeting.

However engaged senior leadership is, employee attitudes on the extent to which their organisation encourages idea sharing, transparency and collaboration are heavily conditioned by their actual experience. It is much better to visibly over-celebrate engagement with collaboration and innovation than create the suggestion that only successes should be recognised. Silver bullet innovations are fleetingly rare so it is better to have lots of ideas in order to increase the chances of a big hit.

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The role of digital collaboration tools
Making good tool-related decisions is crucial to creating a broader culture of openness. 46 per cent of those with effective tools for collaborating saw their organisation as transparent as compared to 22 per cent who do not.

The right tools provide a foundation for innovation. Leaders need to build the right culture on top of it. As a Fortune 500 Head of Innovation told us: "We need to connect everyone in order to innovate. We want to be very diverse. There is an unwritten rule that the more diverse we are, the more chances we have to innovate."

Optimising the selection of tools that are offered or enabled in the workplace begins with taking simple steps to enable access to freely available web-based tools by supplying the Wi-Fi access and unblocking social sites on the corporate network. Although there are some risks involved in this, it's best to first assume that your employees are trustworthy and provide guidelines on the types of information to share on social networks before putting more stringent controls in place.

Once the use and role of company-supplied and employee selected tool has equilibrated, we suggest that managers undertake an audit of their use. This is almost certainly best done by either an independent third party or by an anonymous survey in order to enable employees to answer honestly.

Traditional ways of deploying digital collaboration tools are less effective in the digital era because of service innovation in communications technology and increasing specialisation of role within the workplace. An interviewee described this problem as:

"… they (employees) are used to using their own choice of hardware and software in their personal lives, and for many, there is frustration that the tools they have to use in the workplace feel like 10 steps backwards."

The consensus view from executives is that managers should seek to control some parts of the productivity tools estate – principally those that deal with sensitive information – and deliberately enable openness in others.

Executives as role models

In this context, the power of executives as role models should not be underestimated. Executives using desktop videoconferencing, presentation and document sharing technologies as part of their daily routine are likely to encourage and stimulate their direct reports and teams to try the same tools. In the case of one organisation we interviewed, executives using video-conferencing in lieu of email or phone calls created a pattern of behaviour that quickly had development teams in several countries using the same tools to collaborate on complex tasks, measurably improving productivity and innovation across the business.

The right tools provide a foundation for innovation. Leaders need to build the right culture on top of it and be role models who embrace new tools and practices and express their own ideas more freely. It is unreasonable to expect employees to be willing to raise their heads above the parapet to voice their ideas if executives are not willing to do the same. Employees will seek guidance and comfort from their leaders and from each other, as they do when making major decisions in their private lives. In the workplace, this is the difference between coming to believe that a change is good via discussions with people you trust, and being told that it is good for you in a generic broadcast.

5. Conclusions

Exposure to a decade of rich, engaging collaboration tools in their personal lives has opened the eyes of the European workforce to their potential in the workplace. Our research has found that employees were 17 percentage points more satisfied with their workplace culture when they had access to effective digital collaboration tools and 22 percentage points more likely to believe that their employer cared about their morale. In some countries three-quarters of people we surveyed believe that access to collaboration tools would improve productivity, a view supported by executives of major employers.

And yet just 9 per cent of respondents believe that their organisation has a very effective infrastructure for sharing and collaboration. Perhaps worse still, more than half of European employees tell us that they work in an environment where collaboration is not the norm and their ability to innovate is suppressed.

It is our belief that this is in part a result of digital collaboration tools being regarded as an add-on to the systems of an organisation. The vast majority of tools in a modern organisation are intended to support a given workflow, often one that entails people talking to, and working with, other people. The challenge is that organisations operate in environments that are dynamic. Workflows that are suitable for the core function of a team may lack the flexibility they need to respond to the types of transient situations that are all too commonplace today.

In workplaces that are more dispersed than ever and markets that are more dynamic than ever, digital collaboration tools like social networks, video conferencing and document co-creation play an important role. We are not suggesting that organisations embark on wholesale, top to bottom programmes to redesign around them, merely that collaboration tools are moved from the box marked 'nice to have', to the one marked 'core applications'.

Their value as an add-on is limited as their users must actively think about using them, rather than using them instinctively to speed up their work.

In our view, all large organisations should at least understand the options and have them available to use so that whenever business change programmes are underway, workflows and processes should be redesigned to incorporate them. As many of a third of workers are using them anyway, so it may be prudent to support them in that usage, by enabling them to share their experiences as a legitimate and valuable evolution of working practice and culture.

Furthermore, the power of the pull should be recognised by managers. Now that IT is ubiquitous at home and in the workplace, employees have their own views about what the best tool is for a given task. Open-mindedness by managers is all that is needed in order to enable employees to experiment with new collaboration and productivity tools years before they reach the attention of the IT department. A free-for-all is unwise, but recognition that different people work in different ways is a pragmatic stance to take in the digital economy.

Finally, managers must be role models that help their employees adapt to the new working environment. Again, that means openness to change in their own practices, as much as those of the people they lead. It is fortunate then, that management teams are smaller groups within businesses and they tend to be better equipped to use new hardware and software. They are an excellent group with which to begin the digital collaboration journey.

In these ways, by investing now in changes to the culture of businesses and the tools they use, leaders in Europe can create some practical foundations for future success in the global economy. With sustainable growth seemingly returning to many European and international markets there is no time like the present.

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Appendix: Country comparisons

Figure 1. Proportion of respondents who agree that digital collaboration tools improve productivity, transparency, communication quality and morale

	FRA	DEU	ITA	NLD	SWE	UK	Avg.
Increase productivity	65%	43%	74%	57%	51%	54%	**57%**
Improve quality of communication	62%	43%	71%	48%	52%	57%	**56%**
Increase transparency	50%	39%	66%	49%	48%	51%	**51%**
Improve morale	44%	25%	46%	37%	26%	42%	**37%**

Figure 2. Proportion of respondents provided with the following digital collaboration tools

	FRA	DEU	ITA	NLD	SWE	UK	Avg.
Email	85%	85%	87%	84%	86%	84%	**85%**
Browsing	78%	71%	81%	69%	76%	72%	**75%**
Intranet	87%	82%	85%	83%	86%	86%	**85%**
Social	11%	19%	18%	25%	21%	16%	**18%**
Phone Conferencing	43%	42%	45%	43%	53%	49%	**46%**
Video Conferencing	36%	28%	47%	30%	40%	36%	**36%**
Instant messaging	33%	25%	35%	29%	38%	25%	**31%**
Cloud based email	49%	43%	61%	56%	53%	47%	**52%**
Cloud based document creation tools	53%	48%	58%	48%	52%	48%	**51%**
Online collaborative editing tools	34%	35%	38%	32%	26%	32%	**33%**
Online file sharing tools	18%	20%	26%	19%	19%	19%	**20%**
Shared network drive	62%	70%	72%	64%	64%	69%	**67%**

Figure 3. Comparison of use of digital collaboration tools in work and personal life

	FRA		DEU		ITA		NLD		SWE		UK		Avg.	
	Work	Personal	Work	Personal	Work	Personal	Work	Personal	Work	Personal	Work	Personal	Work	Personal
Email	85%	88%	85%	84%	87%	90%	84%	91%	86%	91%	84%	92%	85%	**92%**
Browsing	78%	89%	71%	84%	81%	90%	69%	87%	76%	92%	72%	93%	75%	**89%**
Intranet	87%	16%	82%	19%	85%	20%	83%	16%	86%	11%	86%	10%	65%	**15%**
Social	11%	54%	19%	53%	18%	71%	25%	77%	21%	70%	16%	67%	18%	**65%**
Phone Conferencing	43%	8%	42%	17%	45%	17%	43%	15%	53%	13%	49%	9%	46%	**13%**
Video Conferencing	36%	10%	28%	18%	47%	21%	30%	14%	40%	13%	36%	14%	36%	**15%**
Instant messaging	33%	46%	25%	40%	35%	60%	29%	43%	38%	44%	25%	42%	31%	**46%**
Cloud based email	49%	63%	43%	58%	61%	77%	56%	63%	53%	70%	47%	63%	52%	**66%**
Cloud based document creation tools	53%	32%	48%	31%	58%	45%	48%	26%	52%	33%	48%	28%	51%	**32%**
Online collaborative editing tools	34%	24%	35%	29%	38%	39%	32%	31%	26%	28%	32%	31%	33%	**30%**
Online file sharing tools	18%	32%	20%	37%	26%	44%	19%	40%	19%	42%	19%	45%	20%	**40%**
Shared network drive	62%	21%	70%	25%	72%	27%	64%	23%	64%	34%	69%	17%	67%	**25%**

Figure 4. Factors contributing to employee satisfaction

	FRA	DEU	ITA	NLD	SWE	UK	Avg
Interesting work	75%	63%	61%	63%	72%	69%	**67%**
Your working relationship with colleagues	71%	62%	58%	66%	72%	68%	**66%**
Feeling valued	59%	63%	61%	63%	63%	76%	**64%**
Your working relationship with management	38%	47%	34%	28%	41%	48%	**40%**
Being part of a team	47%	36%	26%	42%	39%	49%	**40%**
Workplace culture	22%	41%	34%	36%	40%	44%	**36%**
The devices your organisation provides	26%	29%	24%	21%	23%	18%	**24%**
Ability to work remotely or from home	16%	16%	19%	18%	23%	20%	**19%**
The digital collaboration tools your organisations provide	7%	4%	9%	6%	6%	5%	**6%**

Figure 5. Reasons why European workers use collaboration tools not supplied by their employer

	FRA	DEU	ITA	NLD	SWE	UK	Avg.
The tool I wanted to use performs better than tools provided by my organisation with the same functionality	34%	41%	34%	16%	45%	46%	**37%**
The tool I wanted to use has a wider range of functionality than those provided by my organisation	30%	29%	40%	35%	26%	38%	**34%**
The tool I wanted to use is no better than the tools provided by my organisation, but I am used to it and it's my personal preference	19%	22%	20%	19%	27%	16%	**21%**

Figure 6. Factors contributing to employee satisfaction

	FRA	DEU	ITA	NLD	SWE	UK	Avg.
Low collaboration, low innovation	54%	62%	52%	54%	50%	65%	**56%**
Low collaboration, high innovation	21%	11%	12%	13%	20%	12%	**15%**
High collaboration, low innovation	16%	17%	23%	24%	18%	18%	**19%**
High collaboration, high innovation	10%	11%	13%	8%	12%	5%	**10%**

About the research

Data cited in this report is based on a six-country online survey of consumers across Western Europe, with fieldwork taking place in June 2013. A total of 3,433 responses have been captured in this study.

The survey covered France, Germany, Italy, Holland, Sweden and the United Kingdom. All samples in these countries exceeded 500 respondents except Holland (380).

Questions for this survey were written by Deloitte. The online survey program was managed by Ipsos MORI.

Footnotes

1. A Towers Watson study of 50 companies over a one year period found that employee engagement led up to a 19 per cent increase in operating income. Source: Engagement at Risk: Driving Strong Performance in a Volatile Global Environment, Towers Watson, 2012. See: http://towerswatson.com/assets/pdf/2012-Towers-Watson-Global-Workforce-Study.pdf

2. Source: The role of science, research and innovation in creating growth, Department for Business, Innovation & Skills, 8 September 2010. See https://www.gov.uk/government/speeches/the-role-of-science-research-and-innovation-in-creating-growth

3. Source: European startup scenes compared: Tel Aviv, London, Paris, Moscow, Berlin, Whiteboard, 2013. See: www.whiteboardmag.com/european-startup-hubs-compared-tel-aviv-london-paris-moscow-berlin/

Contacts

Simon Wakefield
Sponsoring Partner, Consulting
+44 (0)20 7007 7938
sdwakefield@deloitte.co.uk

Paul Lee
Head of Research, Technology, Media &
Telecommunications
+44 (0)20 7303 0197
paullee@deloitte.co.uk

Matthew Guest
Author & Director, Strategy Consulting
+44 (0)20 7007 8073
mguest@deloitte.co.uk

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