Aternity

The Global Remote Work Productivity Tracker

VOLUME 4: THE EMERGENCE OF COLLABORATION APP SPRAWL

THE SHIFT TO REMOTE WORK AND IMPACT ON COLLABORATION APP USE

As the weeks and months pass since the initial COVID-19 outbreak, the picture of our post-pandemic world becomes clearer. This is especially true for the future of work, as the global shift to working from home (WFH) will be long-lasting. What were initially thought to be short-term costs and efforts to smoothly transition the employee digital experience are now becoming long-term technology investments, especially for productivity and collaboration applications.

As a result, CIOs and IT teams are now addressing the following questions with a longer view: to what extent is remote employee productivity affected by application performance? Are remote employees working more? If so, is it because applications aren't performing as well as employees expect? How much do companies need to invest in IT to ensure the same digital experience whether employees work in the office or at home? These questions form the premise of the Aternity Global Remote Work Productivity Tracker.

Volume 1 examined the switch to WFH in different regions globally and its impact on productivity. It showed that the increase in hours spent working from home more than offset the drop in hours spent in the office, meaning the total number of productive hours had actually increased.

Volume 2 looked at how the working day has changed for WFH employees. It showed that a significant proportion of users had changed their working hours to start later in the day and were spending a much higher proportion of their time using applications to communicate with their colleagues.

Volume 3 analyzed how the digital experience of business applications has changed in the move to WFH, highlighting the impact on different industries and countries.

This volume provides an updated snapshot of changing application usage, including the emergence of collaboration app sprawl. Specifically, we look closely at the change in usage and share of leading collaboration tools as the shift to remote work becomes more entrenched and employees adjust to the new normal.

KEY TAKEAWAYS

- Microsoft Office accounts for **38%** of total application usage time, with Outlook usage growing **46%** between February 17 and June 14.

- Non-work-related web browsing by employees dropped sharply in **late April** as employees became less pre-occupied about the COVID-19 outbreak.

- As of June 14, use of Microsoft Teams grew **894%** from its base usage during the week of February 17. Zoom use grew **677%** from its base usage.

- Microsoft Teams usage growth surpassed Zoom usage growth during the week of **May 4**.

- Between February 17 and June 14, Skype for Business usage share declined from **76% to 45%**, while Teams usage share grew from **11% to 34%**.

- Employees use collaboration tools predominantly for direct, one-on-one interaction. Direct audio and video calls via Skype for Business accounted for **97% of all interactions** for a one week period in mid-June.

CHANGING APPLICATION USAGE

Figure 1 shows a comparison of the application usage by employees.

As we illustrated in Volume 2 of the Global Remote Work Productivity Tracker, employees spend most of their time in relatively few applications with Microsoft Office accounting for 38% of the total usage time and the highest share of usage coming from Outlook. Between February 17 and June 14, usage of Outlook grew 46%.

In Volume 2, we also noted that non-work-related web browsing surged starting in late February when the start of the COVID-19 outbreak occurred, growing 150% between February 17 and April 12. As Figure 2 shows, non-work-related web browsing dropped significantly in late-April as employees better understood the implications of the pandemic on their daily lives.

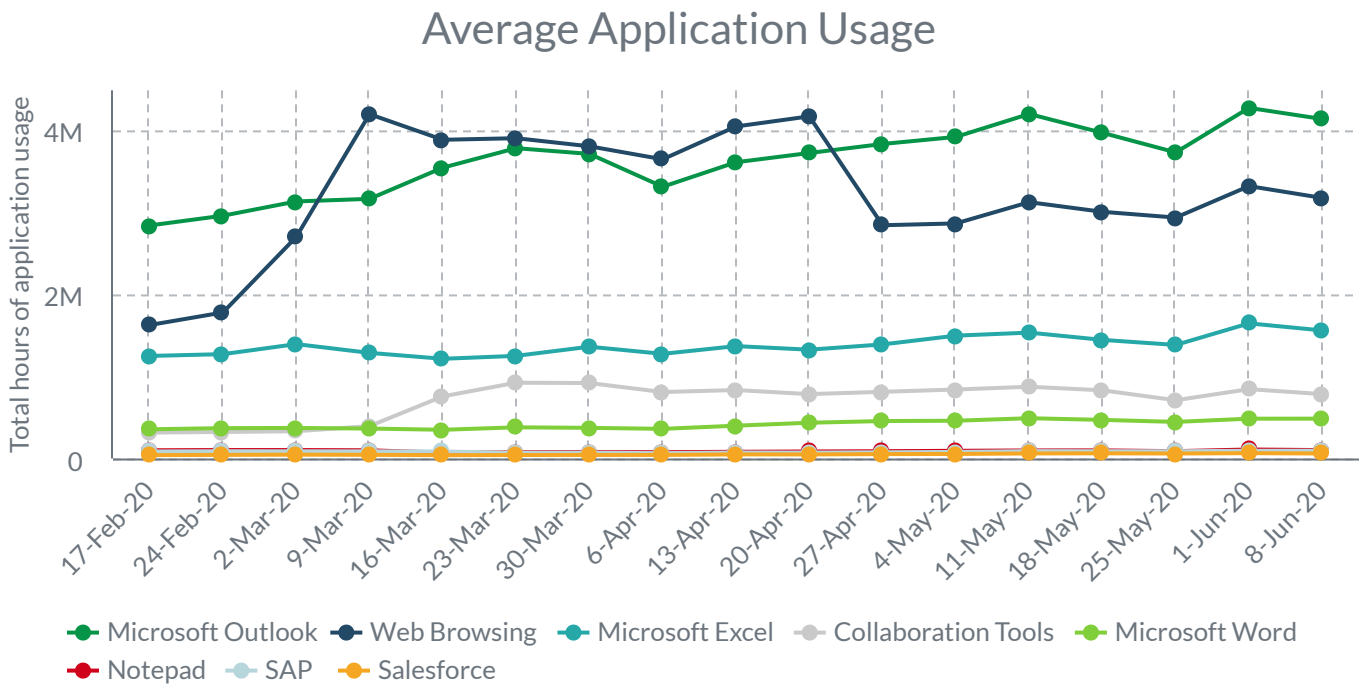

Figure 1. Aggregate hours of usage for different applications, 17th February to 14th June 2020

COLLABORATION APP SPRAWL - USAGE GROWTH

Figures 2 and 3 look more closely at the growth and share of usage of collaboration tools. Our data shows that the shift to remote work creates growing collaboration application sprawl, as individual employees use multiple tools to serve similar needs – from ad hoc one-on-one "virtual water cooler" chats to internal team meetings to larger group brainstorms and working meetings with business partners. The data shows that employees prefer direct audio communications in informal settings while relying on video conferencing when collaborating.

We tracked the growth in usage of major collaboration tools from their "base" during the week of February 17, before the shift to remote work.

Reflecting the use of multiple collaboration tools, the increased use of synchronous collaboration and web conferencing tools was seen in all applications within the category.

Between February 17 and June 14, Teams usage grew 894% from its base usage, followed by Zoom at 677%.

While Zoom grew the fastest in the first month of the surge in remote work, Microsoft Teams was not far behind and eventually surpassed Zoom during the week of May 4. This is likely due to Microsoft's aggressive Office 365 adoption push during this period as well as organizations' growing concerns about Zoom security.

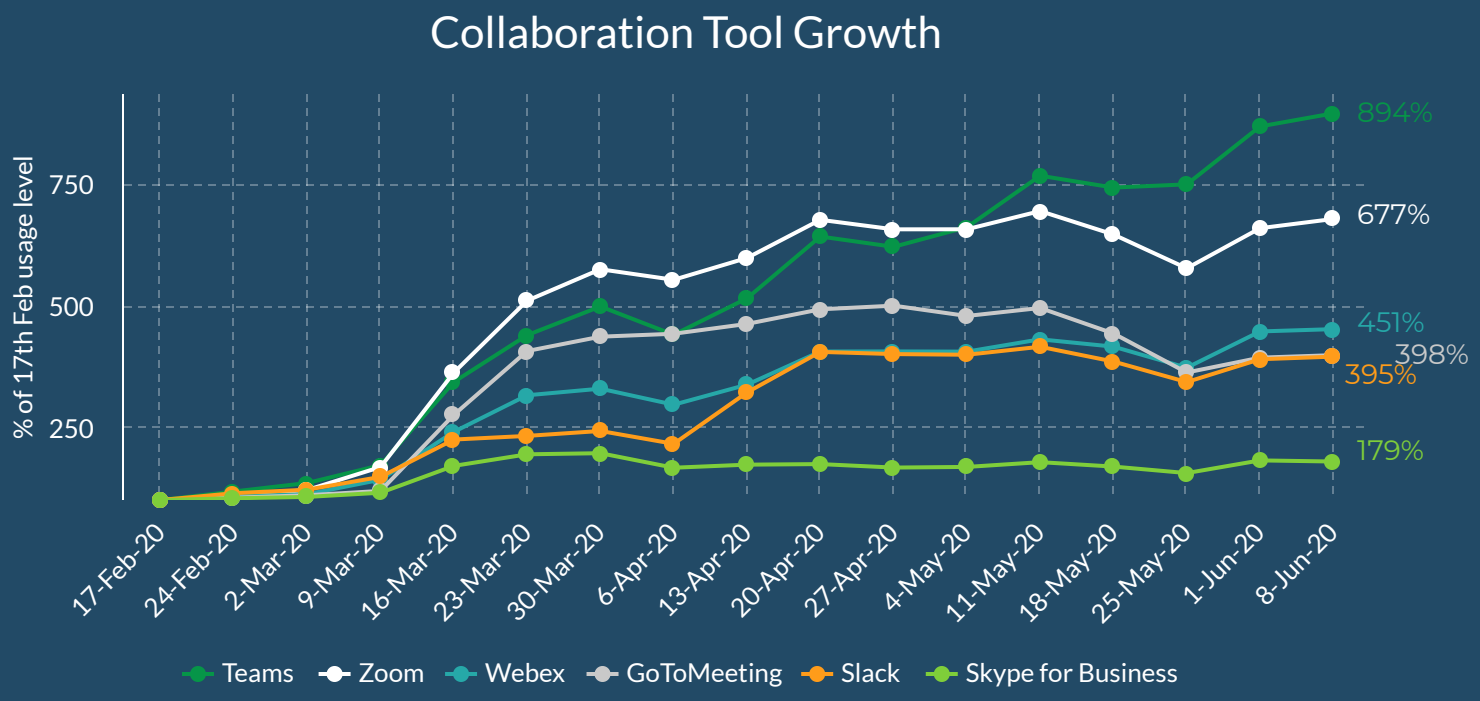

Figure 4. Percentage growth in collaboration tools, 17th February to 14th June 2020

TRENDS IN COLLABORATION TOOL USAGE - SHARE

A closer look at the usage share of these synchronous collaboration tools reveals a trend that was beginning to emerge in volume 2. The growth in usage share of Microsoft Teams came at the expense of Skype for Business. As shown in figure 3, between February 17 and June 14, Skype for Business usage share declined from 76% to 45%, while Teams usage share grew from 11% to 34%. This shows that Microsoft-heavy enterprises migrated from Skype for Business due to Teams' richer set of collaboration capabilities. Based on this trend, we expect Microsoft Teams to overtake Skype for Business in usage share within the next 6-8 weeks.

As we also illustrated in volume 2, the growth of Zoom has not occurred in the largest enterprises. This is likely due to the fact that enterprises are slow to move to new web conferencing and synchronous collaboration tools, especially within Microsoft-heavy enterprises.

As figure 4 shows, however, the simultaneous decrease in Skype and increase in Teams use was not a one-for-one swap. A portion of the decline in Skype usage share resulted from increased usage share of Zoom (+3.49%), WebEx (+3.49%) and Slack (+1.08%), further illustrating growing collaboration app sprawl within enterprises.

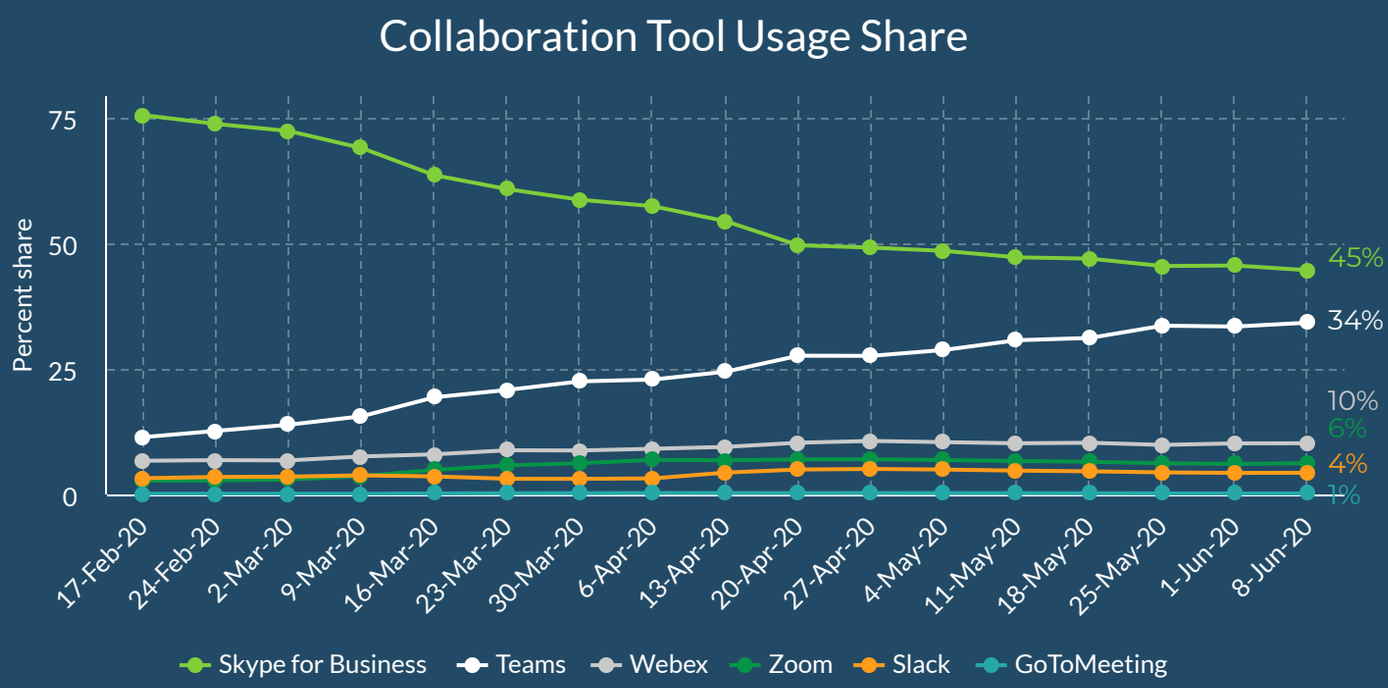

Figure 3. Percentage share of collaboration tools, 17th February to 14th June 2020

Application	Usage Share 17th February	Usage Share 14th June	Change in Usage Share
Skype for Business	75.69%	44.74%	-30.95%
Teams	11.44%	34.28%	+22.84%
Webex	6.73%	10.22%	+3.49%
Zoom	2.74%	6.23%	+3.49%
Slack	3.25%	4.33%	+1.08%
GoToMeeting	0.15%	0.20%	+0.05%

Figure 4. Percentage share of collaboration tools, 17th February to 14th June 2020

HOW EMPLOYEES USE COLLABORATION TOOLS

With remote work becoming more entrenched, collaboration tools replace more than the group brainstorm and internal team meetings that have become so popularized. An organization's culture of collaboration and innovation relies on the one-on-one interaction that takes place at the office water cooler, in a break room or deskside. Without this option, employees increasingly use the same collaboration tools to reach out to colleagues for shorter, direct conversations that replicate face-to-face interaction as much as possible.

Figure 5 shows the difference in the duration for different types of Skype for Business calls. During the one-week period between June 8 and June 14, the length of direct audio calls was 68% less than group calls on average, while direct video calls were 58% shorter than group calls.

Despite calls being shorter, direct Skype for Business calls accounted for 97% of all interaction during the same period, which provides an indication of how remote employees depend on one-on-one interaction to get their jobs done.

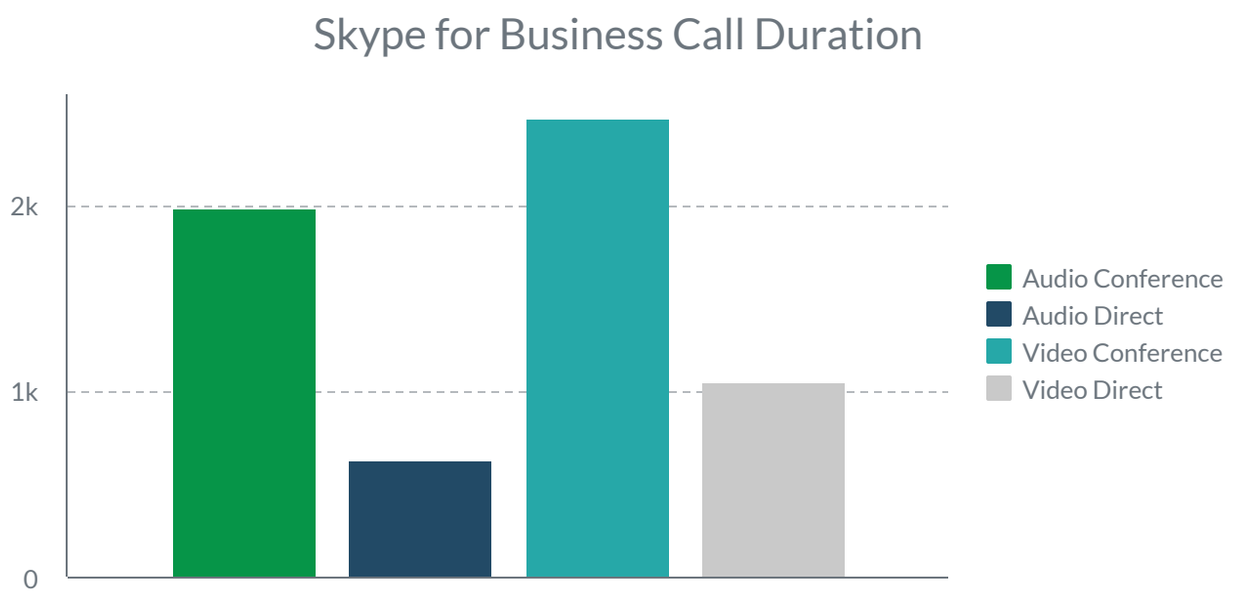

Figure 5. Average Skype for Business call duration (seconds), 8th June to 14th June 2020

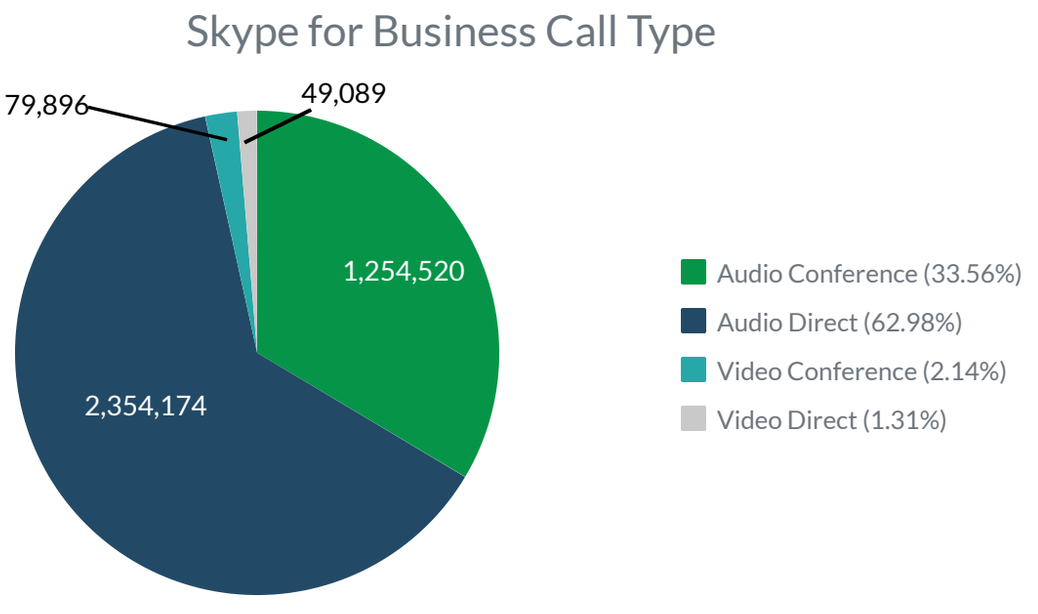

Figure 6. Number of Skype for Business calls, 8th June to 14th June 2020

MANAGING COLLABORATION APP SPRAWL WITH THE ATERNITY DIGITAL EXPERIENCE MANAGEMENT PLATFORM

The Aternity Digital Experience Management Platform enables companies to keep pace with the increasing number and importance of collaboration apps by ensuring they deliver excellent employee experience to the distributed workforce.

Aternity treats collaboration apps just like any other business-critical app. As shown in figure 7, Aternity provides a one-stop shop for IT and the business to track usage, performance, and employee experience of all of the collaboration apps in use in the enterprise.

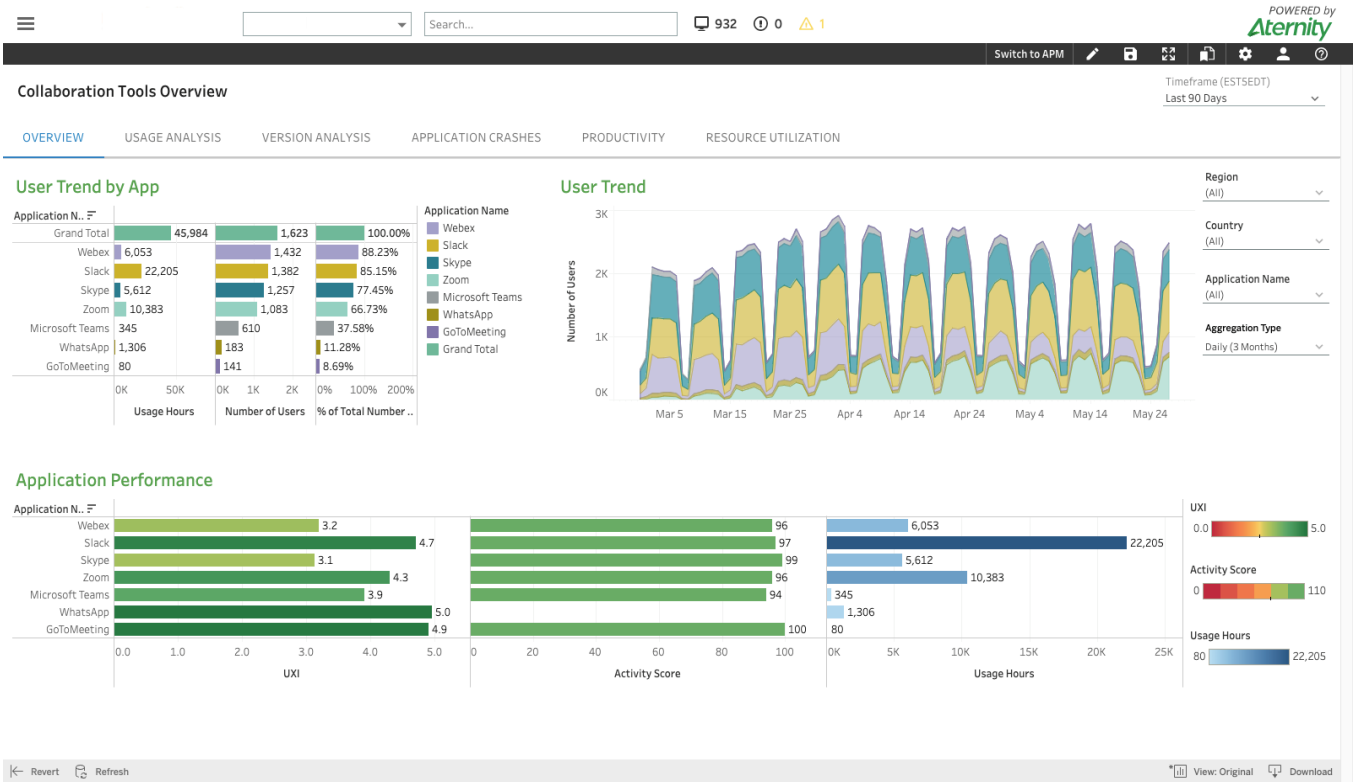

Figure 7. Aternity provides a one-stop shop for managing usage and performance for all of the collaboration apps in use in the enterprise.

ABOUT THE RESEARCH

The Global Remote Work Productivity Tracker is based on data aggregated from millions of employee devices from over 500 global companies being managed via the Aternity Digital Experience Management Platform, an enterprise SaaS solution. The reports are generated via Aternity's built-in, advanced analytics and custom reporting capability.

Learn more about Aternity's solutions for the remote workforce

About Aternity

Aternity, the enterprise-class Digital Experience Management company, transforms the employee experience in the digital workplace, with enterprise-scale analytics for every application, all transactions, any device, and all users. Aternity's AI-powered visibility and self-healing control help IT optimize business application performance to improve employee productivity and customer satisfaction, mitigate the risk of IT transformation, and drive down the cost of IT operations. To learn more about Aternity, visit aternity.com