Technology and the Evolving World of Work

Global Research Study | July 2020

TECHNOLOGY AND THE EVOLVING WORLD OF WORK

In the first half of 2020, the COVID-19 pandemic created a sudden shift to work-from-home (WFH) for millions of employees around the world, forever altering how people work and their expectations for the technology they rely on to do their jobs.

As business leaders, IT departments and tech suppliers grapple with how to power this new era of working remotely, the *Technology And The Evolving World Of Work* report explores the perspectives of over 20,000 employed adults in 10 markets about their experience with technology in the workplace and the impact of COVID-19 on their preferences, connectivity and work/life balance.

Methodology

Sample: Online Survey of 20,262 respondents in 10 markets: United States, Brazil, Mexico, United Kingdom, France, Germany, Italy, China, India and Japan

Fielding Period: May 8th – 14th, 2020

Margin of Error:
- For overall sample is < 1 percentage point (95% confidence)
- For each market sample is +/- 2 percentage points (95% confidence)

Business Size:
- Enterprises: 1000+ employees globally
- Large SMBs: 500-999 employees globally
- Medium-sized SMBs: 100-499 employees globally
- Small SMBs: 1-99 employees

Generations:
- Gen Z: Ages 18-24
- Millennials: Ages 25-42
- Mid-Lifers: Ages 43-55
- Age 56+:   Age 56+

KEY TAKEAWAYS

With over 72% of employees saying their work location has been impacted by COVID-19 – particularly among younger generations – respondents have reported that they are:
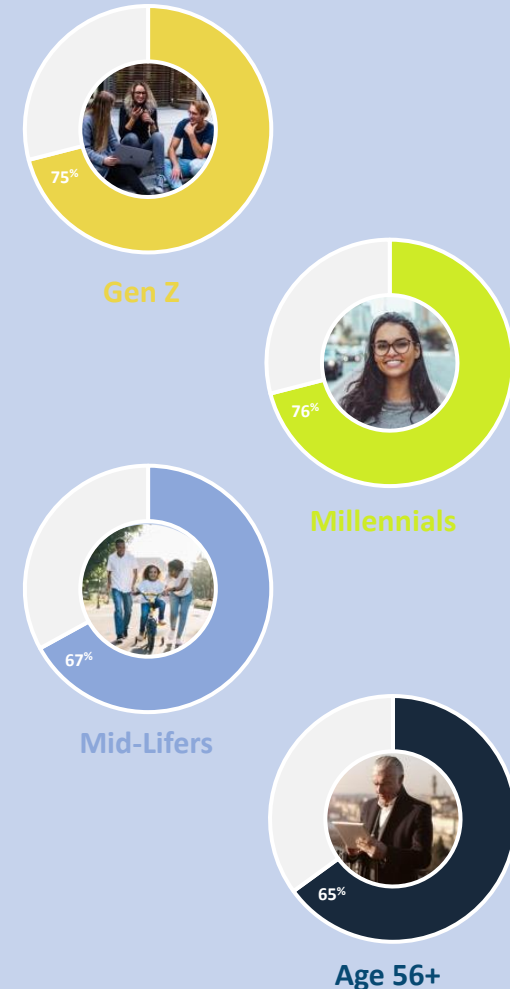
More productive than ever despite distractions

Embracing their newfound "role" as their own personal IT assistant

Spending their personal funds to keep up with WFH demands

Expecting the workplace to be forever altered

Percentage of employees in each generation whose work location has been impacted by COVID-19

75%
Gen Z

76%
Millennials

67%
Mid-Lifers

65%
Age 56+

IN THIS REPORT

The following sections of this report provide a window into the positive and negative aspects of working from home amid COVID-19, employees' evolving technology needs, and advice for companies and IT leaders on how to power the future of work.

1	**2**	**3**
BENEFITS OF WORKING FROM HOME IN THE COVID-19 ERA	**CHALLENGES OF WORKING FROM HOME IN THE COVID-19 ERA**	**FINDING SUCCESS IN THE NEW WORKPLACE "NORMAL"**

BENEFITS OF WORKING FROM HOME IN THE COVID-19 ERA
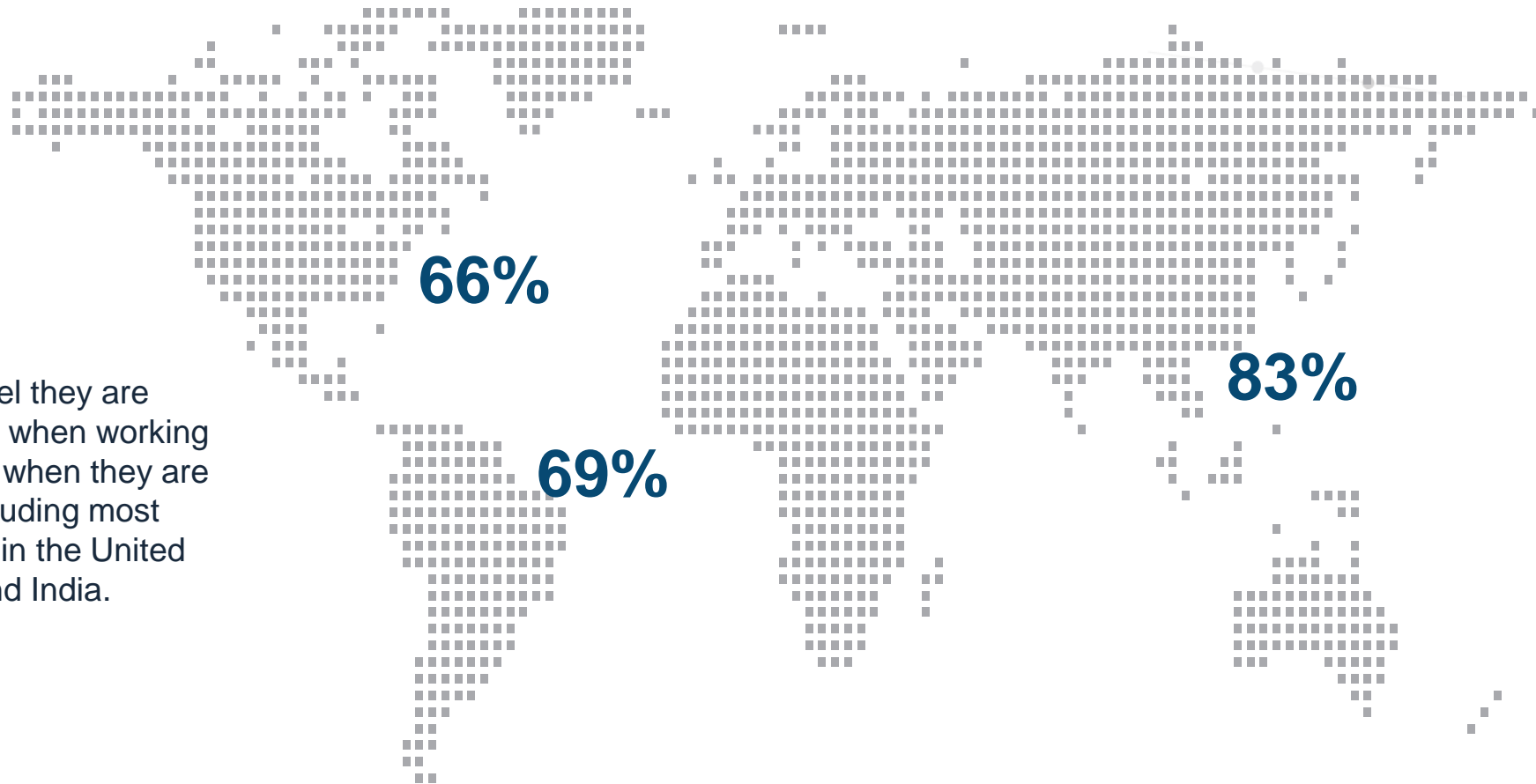
1

IMPROVED PRODUCTIVITY ACROSS REGIONS

63%

of employees feel they are more productive when working from home than when they are in the office, including most prominently within the United States, Brazil and India.

66%

69%

83%

MORE INDEPENDENCE THAN EVER

Through setting up their own technology and having to troubleshoot from home, **79% of employees "strongly" or "somewhat agree"** that they have become their own IT person since working from home.

This is felt even stronger by employees in India (95%), Italy (90%), and China (90%).

CHALLENGES OF WORKING FROM HOME IN THE COVID-19 ERA

2

EMPLOYEES FEEL COMPANY TECH IS NOT KEEPING UP WITH NEEDS

19% of global employees believe their companies are **leaders** in their industries when it comes to adopting new and emerging tech, and are strongly committed to staying up to date.

⬆ Rises to **24%** among employees at **Enterprises** and **Large SMBs**

⬇ Falls to **16%** among **Medium SMBs and 12%** among **Small SMBs**

46% feel their employers are only middle of the pack or **falling behind with their tech needs**

82% indicate their employers **encounter barriers** as they endeavor to keep up to date with new and emerging tech.

Top barriers include:

Difficulty training employees to use new and emerging tech

Prioritization of **budgets** and overall affordability

Lack of understanding by IT Decision Makers of **employee needs**

SIGNIFICANT PERSONAL SPENDING ON TECHNOLOGY FOR WORK

70% of employees say they have **purchased new technology** to be able to navigate the new work from home requirements **during COVID-19**

Of those that have **purchased new tech**, **61%** say their employers completely paid for it, while **39%** paid for the new tech partially or fully on their own.

$273 USD average amount employees have personally **spent to upgrade** or **improve technology** while working at home due to COVID-19

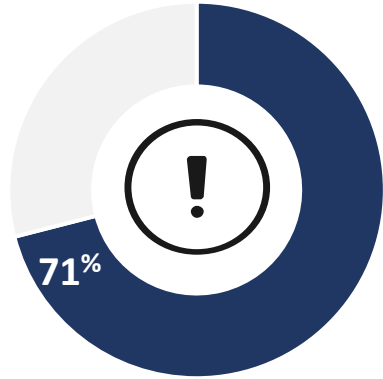Highest in **Germany**, **United States, Italy and Great Britain**:
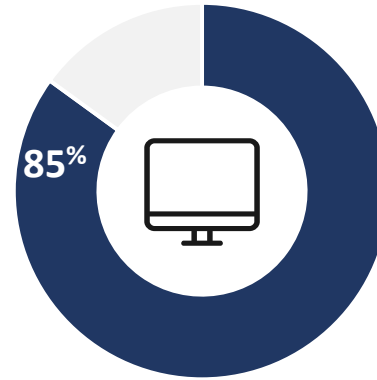
343€
($381 USD)

$348

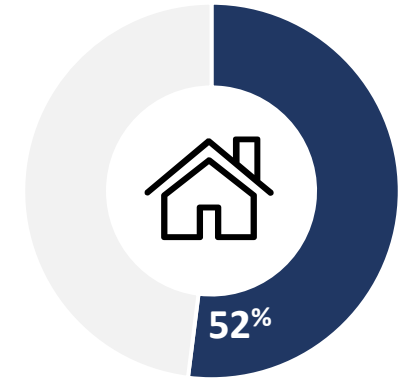**305€**
($340 USD)

£271
($339 USD)

INCREASED PHYSICAL PAIN POINTS AND TECH RELIANCE

71%

Complain of new or worsening aches and pains while working remotely during COVID-19, including **back and neck pain, poor posture, headaches, difficulty sleeping, and eye strain.**

85%

Feel **more reliant on their work PCs** (laptops or desktops) than they did when they were working from the office

52%

Believe they will **work from home more than in the past** even once things start to return to normal post-COVID-19

WFH: TOP CHALLENGES

Along with physical ailments, workers around the world identified other top challenges to the WFH experience:

Harder to separate "work life" and "home life"

Having to do more conference calls than usual

Reduced personal connection with coworkers

Getting easily distracted / hard to concentrate

Harder to collaborate with people remotely

This lack of connectivity also translates to employee teleconferencing tech, where **31%** are dissatisfied with these tools within their WFH setup.

DEVICE SECURITY CONCERNS

1 in 3

worry that tech can make us **more vulnerable to data breaches and hacking**, the top pain point across generations when asked what challenges tech has brought to current work experiences

72%

of employees are "extremely" "very" or "somewhat" **concerned about protecting their personal data** on their work devices when asked

Naturally as technology has powered work from home (WFH) around the world, workers also expressed concerns around security and being heavily reliant on tech at home to get the job done. Employees of all ages agree their top tech concern when WFH is how it makes their companies more vulnerable to data breaches.

As a result, security will need to be built into employees' hardware, software and services (including deployment, set-up and maintenance) from the get-go.

3

FINDING SUCCESS IN THE NEW WORKPLACE "NORMAL"

THE PATH TOWARD A BETTER WORKING FUTURE

The **top five** ways tech companies could help employees going forward:

1 Focus on training employees not on tech as a tool but how tech folds into their tasks

2 Consider the learning curve employees will face with tech and focus on providing the right tools

3 Ensure tech is not a "one-size-fits-all" for work devices

4 Invest in products with increased usability through predictive AI/Machine Learning

5 Provide software and security updates without getting in the way of employees and underlying their benefits

EMBRACING OF NEW WORKPLACE REALITY

Nearly half (**48%**) of employees have a positive perspective on remote work completely displacing working in a physical office, with **27%** of employees saying they're "happy" and **21%** "excited."

Some markets are even more positive about the idea of working from home for longer – in India, **50%** say they would be happy if it replaced offices completely.

EASIER-TO-USE TECHNOLOGY AND MORE TRAINING ARE KEY

65%

of employees globally
believe they could do their
jobs better if they had better
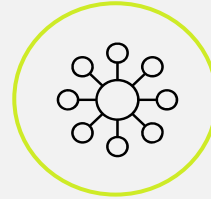tech skills

Globally,

employees want more accessible
products and trainings on how
to use the technologies most
effectively.

AMPLIFIED TECH CAPABILITIES OFFER A GLIMMER OF HOPE

Employees are excited about the *future of tech capabilities* at work, believing the following will have a positive impact on their jobs.

83% | 5G Networks

79% | AI & Machine Learning

79% | Internet Of Things

75% | Augmented Reality & Virtual Reality

Thanks.