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
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. Benefits of Working from Home in the COVID-19 Era
2. Challenges of Working from Home in the COVID-19 Era
3. Finding Success in the New Workplace "Normal"
BENEFITS OF WORKING FROM HOME IN THE COVID-19 ERA
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.
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
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
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 ($340 USD)
- 305€ ($339 USD)
- £271 ($339 USD)
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.

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

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:

- Reduced personal connection with coworkers
- Harder to separate "work life" and "home life"
- Getting easily distracted / hard to concentrate
- Having to do more conference calls than usual
- 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.
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.

Of employees are “extremely” “very” or “somewhat” concerned about protecting their personal data on their work devices when asked.

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.
FINDING SUCCESS IN THE NEW WORKPLACE “NORMAL”
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.
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.
Employees are excited about the **future of tech capabilities** at work, believing the following will have a positive impact on their jobs.

- **Augmented Reality & Virtual Reality**: 83%
- **5G Networks**: 79%
- **AI & Machine Learning**: 79%
- **Internet Of Things**: 75%
- **Augmented Reality & Virtual Reality**: 75%
Thanks.