

The Global Evolving Workforce

Report #1: The Workforce Perspective



Foreword

Steve Lalla
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The only constant is change: technology serves as an apt embodiment of this timeless adage. When I consider the incredible influx of disruptive technology over the past three decades, it is amazing how much all of our lives have changed and improved. It can be easy to take for granted—we all expect to have a phone in our pockets that dwarfs the computing power of the early Apollo missions—but it is still tangible how the continued evolution of technology is changing our day-to-day lives profoundly. It's only natural for that to spill over into the workforce. A few years ago, we were content with mobile email access—but today's employee wants more. Whether it's having access to an entire set of company data and documents on a mobile device via the cloud or using a virtual desktop via thin client to actually bring the office desk experience with you—technology is constantly pushing the way we work to be more efficient and productive.

That's why Dell launched a research initiative to fully understand exactly how technology is shaping the workforce of the future and in 2012 we shared the findings of our first Evolving Workforce Report. In our second Evolving Workforce Report we take a look at how the maturation of technology areas such as cloud, BYOD and virtualization have further altered the way we do work and the impact it has on our personal and professional lives. For employees, the goal is to be more efficient and effective by having the same access in the traditional work environment that they have outside of their company firewalls. At the same time, they want access to the content, applications and internal tools they have working at the office when they are working remotely.

For CIOs and other IT decision makers, the purpose of the evolving workforce is beginning to take on added significance. While CIOs always want to provide technology that keeps the workforce as productive and creative as possible, an investment in advancing technology is becoming a matter of talent attraction and retention as well. Modern workers expect the same technology experiences of their personal lives at work as well. An organization that is flexible to integrating the full spectrum of available technologies provides a much more attractive destination for top talent.

As the workforce continues to be filled by younger, digital native employees, there is a growing percentage of employees more comfortable being constantly connected and maintaining instant access to pertinent work tools than having to wait and go get them. For organizations, the challenge continues to be providing flexibility to assuage these workforce demands for consumer behavior within the corporate environment while maintaining an appropriate level of security and cost-effectiveness.

The following Evolving Workforce report takes a deeper look at how new technologies are molding our work experience.



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Methodology

Quantitative Research





This quantitative phase of the research, conducted by TNS, comprised a 20-minute online interview with full-time professionals working a minimum of 35 hours per week aged 18 or older across 12 countries. A total of 4,764 interviews were conducted between July and September, 2014.

Survey covered the following topics, with each including a future looking component:

- Technology Adoption and Usage
- Workplace Ergonomics
- Work/Life Balance and Productivity
- Career Evolution

During the analysis, content from each of these categories was woven together to create the six themes discussed in detail in this report.

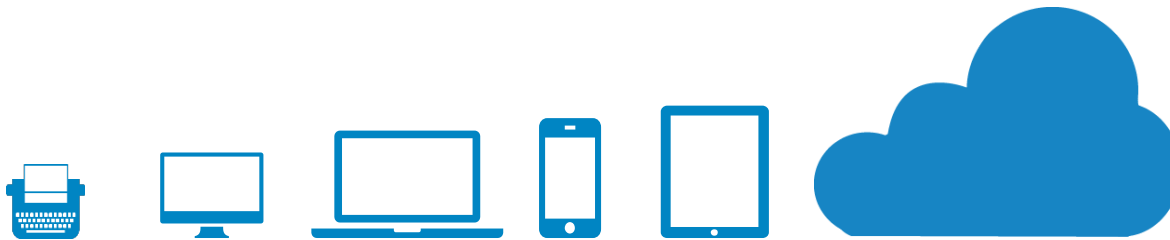
The number of surveys conducted in each country are provided below:

		Completed Interviews
Total		4,764
Developed Markets		
	US	502
	UK	502
	France	500
	Germany	500
	Japan	501
Emerging Markets		
	Brazil	501
	India	502
	China	503
	Russia	302
	Turkey	150
	UAE	150
	South Africa	151

- This study included participants from small (1-499 employees), medium (500-4999 employees), and large (5000+ employees) companies from the following industries:
- Private: Financial Services, Manufacturing, Retail, Media & Entertainment, Private Healthcare, Private Education
- Public: Government, Public Healthcare, Public Education

What is shaping the evolving workforce?

Desktop computers exploded into the office in the late 80's, forever changing the way we work and setting office technology on a dizzying cycle of innovation and obsolescence. Thirty years later, a device that can render CGI graphics a thousand times faster than the "supercomputer" of the day now fits in your back pocket.*



In spite of the advent of innovative alternatives in shrinking form factors, the desktop computer hasn't been left behind in the exponential increase in computing "oomph": it still rules as the preferred technology for conducting business at work.

But for how much longer? The workplace is changing. Now more than ever, the "office" isn't defined by a desk within an employer's walls. Job responsibilities are being met at home, at client locations, even in public spaces like coffee shops and public transportation, so mobility has become a priority. And even within the employer's walls, the environment looks a lot different.

Amid the flux, mobile technologies and alternative interfaces are playing an increasing role—laptops, tablets, mobile phones, 2-in-1s, thin clients and desktop virtualization introduce unprecedented versatility into the IT toolkit.

One size doesn't fit all



Today's workers rely on more than one device to meet the demands of their jobs

Even after all these years, **the desktop is the top device for getting work done in the office**. More than three-quarters of employees use it for work and almost as many identify it as their most preferred device.

This may be changing, however—just two short years ago, desktop use was at 85%. At the same time, mobile device use has crept up, with a two point increase in laptop use and a seven point increase in smartphone use. Even tablet use is on the rise, up five points to 14% in 2014.

The desktop is used as a single device more often than any other, but more than half of desktop users supplement their efforts with another device.

When work bleeds over from office to home, the laptop gets equal billing with the desktop as the primary device for getting work done.

Tablets and 2-in-1s use is low across the board, but slightly higher when working at home.



60%

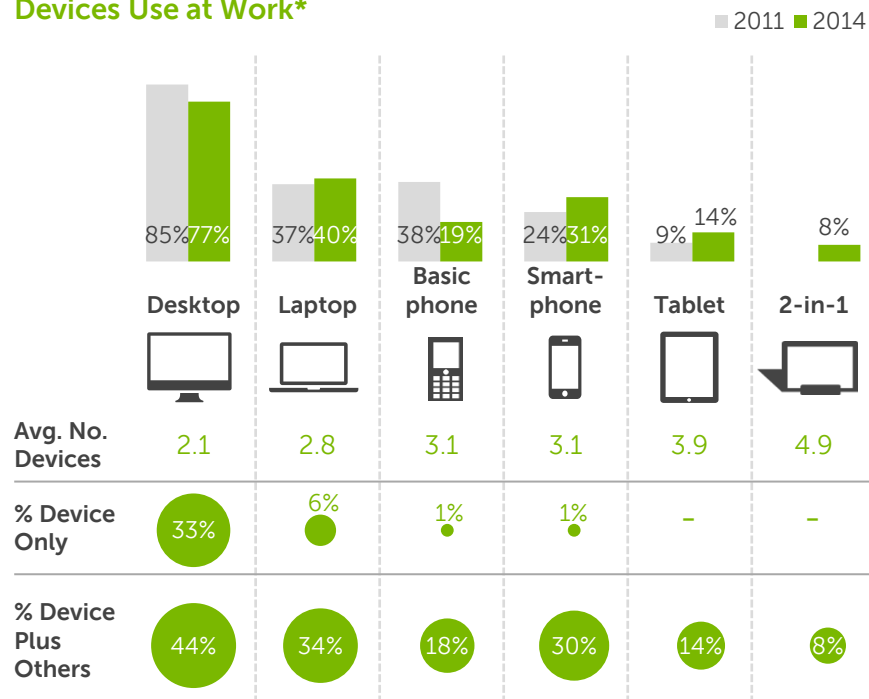
of workers regularly use more than one device.

Desktops are more likely than other devices to be used alone.

Tablets and 2-in-1s are used in conjunction with other devices.

Based on reported use in the office

Devices Use at Work*



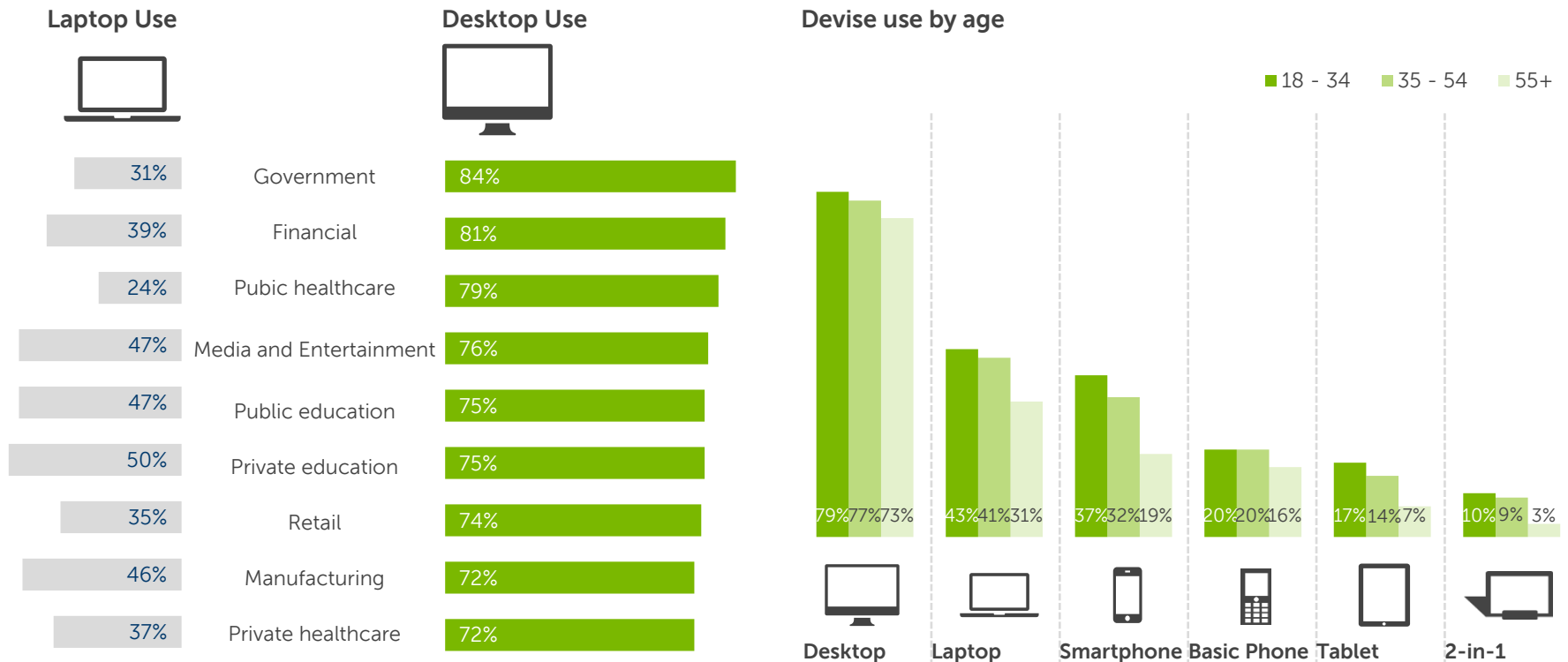
"If we look three to five years out, nobody is migrating towards a one device does everything... they want specific devices that help enable them to be productive at the thing they're trying to do."

David Buchholz, Director of Enterprise Client Strategies at Intel Corporation



Desktop use is most prevalent in financial services and government

Younger workers have the highest usage of most devices, coming in on par with older groups only on the basic phone and the 2-in-1. In fact, younger workers on average use more devices than those over 55 (2.1 vs. 1.5).



Tablet and 2-in-1 use is growing, with the highest use among executives and in emerging markets

Tablets



29%

Tablet **work use** is **higher in emerging markets**, especially **China**



35%

Higher work use among **senior executives**



29%

Higher work preference in **South Africa**

2-in-1s



24%

2-in-1s are **popular** with **senior executives...**



17%

...and with **people who think tech is important** at work



29%

Higher work preference in **China**

“One [of the things I see evolving] is the **use of either smart phones or tablets to actually do work**. We do a lot more things [as consumers] on different sized devices and I think you'll see that trend continuing in the workplace.”

Dane Parker, Vice President, Global Facilities & EHS at Dell

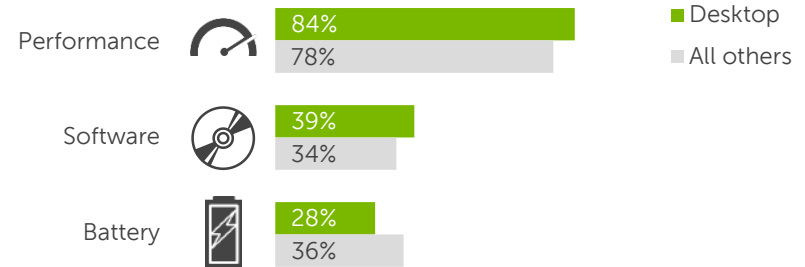
When selecting any device, performance is top priority

Performance is the most important attribute people look for in a work device, regardless of the type of device, geography or role.

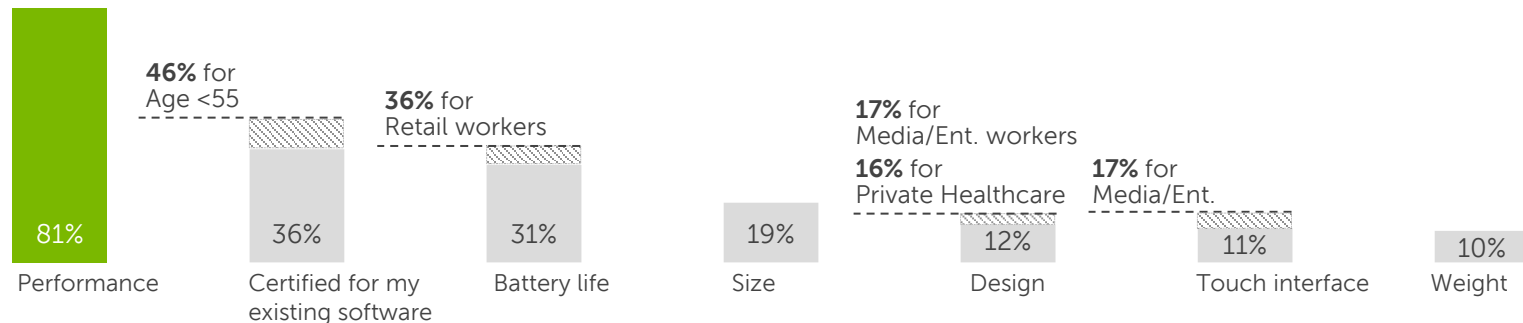
Second place goes to software compatibility (seamless operation)—but only people who primarily use a desktop. For everyone else, battery life edges out software for the number two spot. Other differences exist by age or industry.

Lower priority is given to design, a touch interface, and weight, but as tablets and 2-in-1s start to get more traction in the workplace, these features will likely become more important.

Most important attribute



% Attribute ranked first or second in importance



87%

of workers in Russia **rank performance in the top two** desired features, the highest of all countries in the study



72%

UAE is the lowest
(but still higher than other features)

The rise of the touch screen interface begins at home

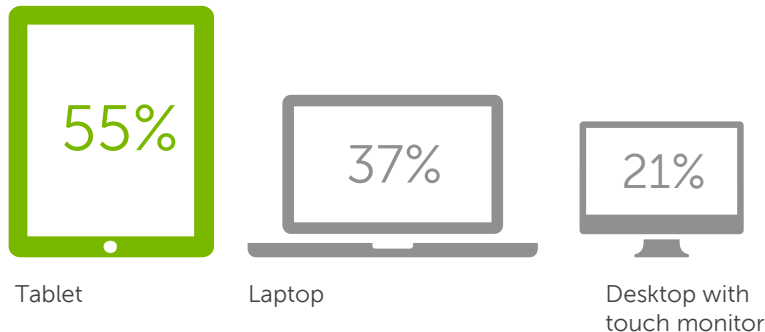
Touchscreens are common for personal use, but they have been a bit slower to gain traction in the work arena.

An exception is for people who take work home to complete after hours—they use more devices on average compared to people who don't take work home, and are four times more likely to have a touchscreen in their device repertoire.

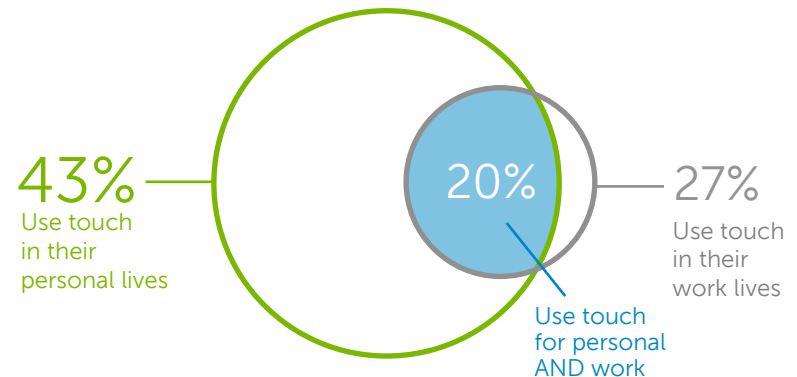
Executives are also more likely to use touch devices, as are younger workers (under 35).

Employees of large companies and older workers are more likely to say they don't use touch for work—and never will.

Which touchscreen devices are people using?



This still amounts to only about a quarter of employees who use touch devices for work. This is changing—42% say they want to use touch devices in the future.



Most employees using touch for work are also using it for personal purposes.

"Touch only really adds value when you've got applications that use it, and if you don't have applications that use it, then you're not going to do it."

Bob O'Donnell, Founder & Chief Analyst at TECHnalysis Research

The takeaways

To be productive, employees will use whatever device **best meets the need for the task** and circumstance at hand.

Employers need to **empower employees** to be successful by having the **right technology** for the job available, **which may be multiple devices.**

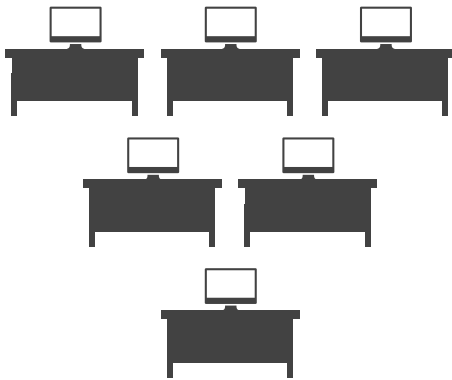
The Office is King, but it's a Jungle Too



By far, most work is being done in the office of an employer

Almost all employees spend at least some time in an office, and more than half spend at least 75% of their time there.

Not only is the office the most common place for getting work done, it's also the most conducive to high performance. 70% of workers say they do their best work there.



But working in today's office environment looks a lot different than it did when cube farms dominated the spaces. Employers are beginning to create environments that foster a sense of community.

Community requires exposure. 25% of offices are laid out with little or no barriers between employees—a fully open floor plan. Another 28% have a plan that is a mix of traditional and open.

In the media/entertainment industry, two-thirds of offices have either an open or mixed layout.

Shared spaces also enable a social aspect to the workplace. More than half of employees work in spaces that have common kitchen/break room areas, and 44% in offices with small seating areas. Most employees make regular use of these spaces.

And just sitting at a desk isn't necessarily an unpleasant experience. Half of employees globally feel very or extremely comfortable at their desk—only 13% report being uncomfortable.

Employees in emerging markets are more likely to report their discomfort (59% as compared to those in developed markets at 34%).



53%

of employees **use the traditional office layout in Germany**, more than any other country

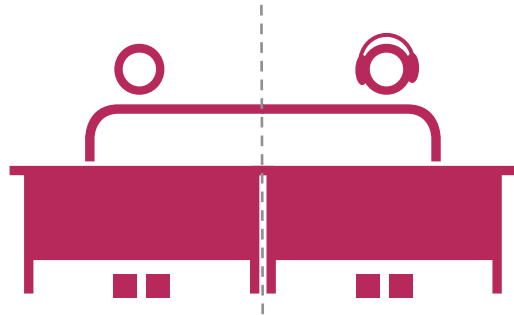
The personal interactions that come from an office environment can be a blessing or a curse

Communication channels that involve personal interactions are generally preferred over more remote options.

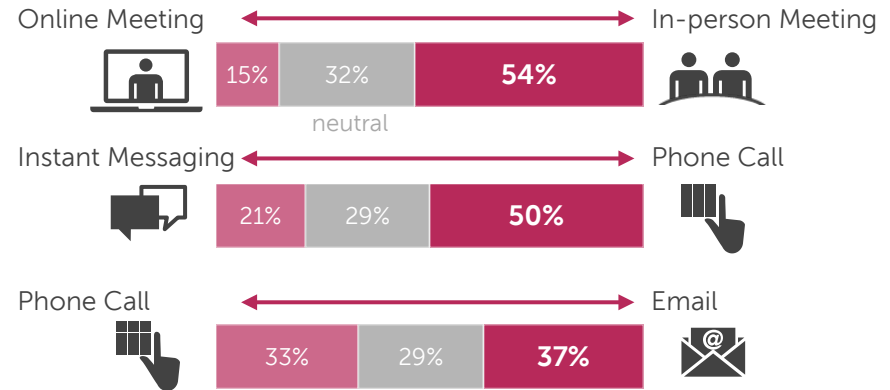
In-person meetings win out over online meetings by more than three to one. More than twice as many people prefer phone calls to instant messaging. Email is on equal footing with phone calls.

The downside of working in an office? Half of workers say they are frequently interrupted at their desks, a number that is consistent across layout types. And people who say they are frequently interrupted are also twice as likely to say they always wear headphones at their desks.

Even the community aspect of office work has its limits. Half of employees still frequently IM or email colleagues who are located physically near them rather than talking with them directly. This is more likely in emerging markets, where two-thirds of employees admit this behavior (compared to one-third in developed markets).



Communication Preferences



"[T]ruly innovative ideas come from people having the **human connection**... I think the dynamic of people being in the same place, working in the same place, being able to drop in on one another is way too powerful."

Mark Crowley, Leadership Change Agent & Author of *Lead From The Heart*

The takeaways

Employees report that **they are most productive in the office**, so employers should provide the technology and a work space to enable them to do their best work.

Open office spaces are beneficial for collaboration, but employers also need to provide quiet places for employees to get work done. **Frequent interruptions are a concern** as they may be diminishing employee effectiveness.

Work Life + Personal Life = Life



As innovations in technology continue to advance, people have increasing flexibility to choose when and where they meet their professional obligations

After the office, the most common place where work gets done is at home. Nearly two-thirds of workers globally conduct at least some business from home (including taking calls or checking email after hours), and about half regularly spend some of their working hours at home.

Working at home is more likely for people in media/entertainment or education (public or private), two-thirds of whom regularly work there. (They are also more likely to check work email after hours.)

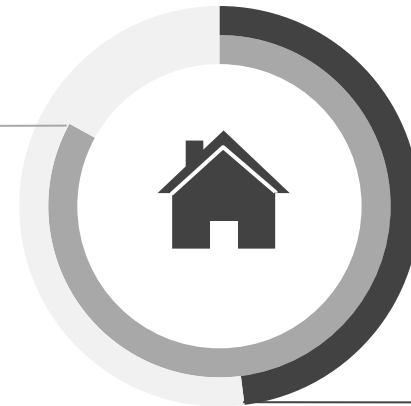
There is a stronger trend toward working at home in emerging markets, where 83% of employees report doing some work at home (compared to 48% in developed markets).

Older workers are less likely to work from home (38%).

Employees who do some work from home

83%

Emerging markets



48%

Developed markets



One-third

of home workers report that they **shave less**



More than half

wear more leisure clothes
(pajamas, sweats, workout attire)



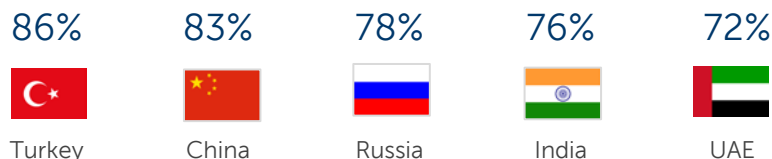
The crossover of devices between work and personal use—"Bring Your Own Device"—contributes to this blur

More than half of workers are authorized by their employers to use personal devices for work—mostly desktops, laptops or smartphones. (In emerging markets, it's three-quarters.)

However, only half of these devices are secured by the employer, potentially putting confidential company information at risk.

For people whose companies don't allow BYOD, more than one-third would use a personal device if they could (including a desktop, laptop, smartphone, or tablet).

Top BYOD (Approved) Countries

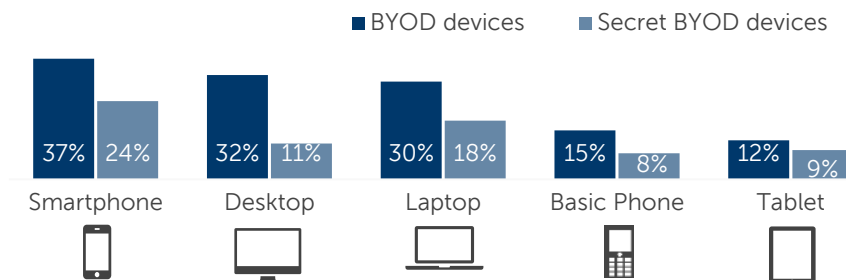


Top BYOD (Approved) Industries



Many employees handle their company's disapproval by doing it anyway: 43% of workers use personal devices for work without their employers' knowledge (mostly smartphones). This is particularly true of emerging markets, where 61% use personal devices in secret.

43% say they
use personal devices without the company knowing



Large companies are the **least likely** to allow personal device use for work (41%). **Medium companies** are the **most likely** to secure personal devices (62%).

Employees most likely to use devices in secret are...
in Media/Entertainment (56%)
in Medium-sized companies (32%)
aged 18–34 (51%)

"People do sneak in time to get extra stuff done, so there's no question that one clear change with technology is the ability to work more, and I think most companies see that as one of the key benefits of mobility, BYOD, is the fact that they are going to get **more productivity just because of time spent**, not necessarily more productivity per hour but just **more hours if you give them access to effective mobile devices.**"

Bob O'Donnell, Founder & Chief Analyst at TECHnalysis Research

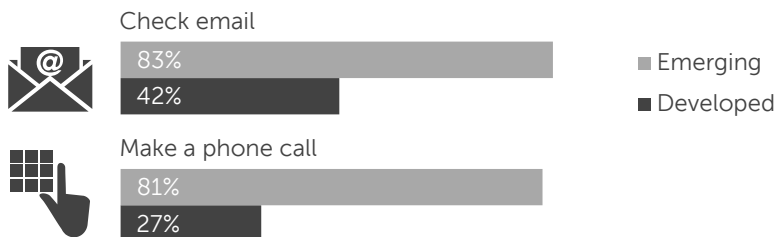
The demise of the 9 to 5

Having flexibility in device options becomes particularly important as work demands increasingly bleed outside of regularly scheduled shifts.

Although this trend occurs everywhere, it is particularly pronounced in emerging markets. Half of employees in developed markets take work phone calls or check work emails after business hours—in emerging markets, that result is nine out of ten.

Almost three-quarters of employees in emerging markets take work technology home with them to work (or expect to in the future). This compares to only one-third of employees in developed markets.

Business activities at home



Is this flexibility a good thing? Workers in emerging markets think so. 40% agree that mobile technology gives them the freedom to be more involved with their families without jeopardizing work responsibilities.

At 17% agreement, workers in developed markets are less enthusiastic.

"I think what's happened is work life and home life have kind of merged into life. And that's going to continue as a trend...And so, you're starting to see people trying really hard to redefine their work life in the tech world."

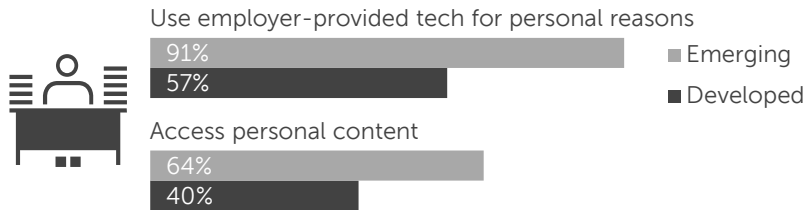
Robin Raskin, Founder & CEO of Living in Digital Times

Younger employees and employees of smaller companies are **more likely to check work email or take work calls from home**, as are people in Media and Entertainment or Education.

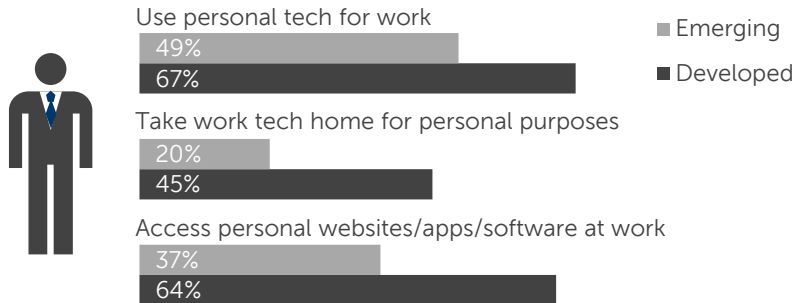
Shhh... Don't tell the boss

But as work obligations encroach into personal time, work time also gives way to personal obligations.

Personal activities at work



Executives blur the lines more than other employees:



Half of employees globally check personal websites at work (85% in emerging markets), two-thirds check in with spouses or children at least one a day.

More than 80% of workers in emerging markets check in with spouses and kids.



17%

of married employees in emerging markets
call their significant others 5 times a day or more!



16%

of employees with children in emerging markets
call home 5 times a day or more!



Senior executives in emerging markets are twice as likely as those in developed markets to **check in on pets via video** at least once a day.

Bringing home the work... and the work space

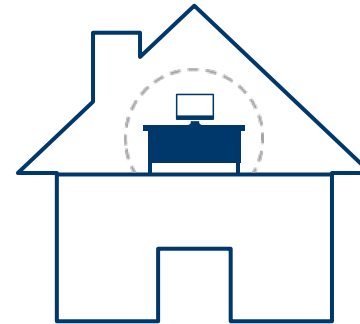
Most home workers have some kind of space designated for work.

Most at-home workers conduct at least 75% of their work in a designated work space—either a separate room or a dedicated space in a shared room.

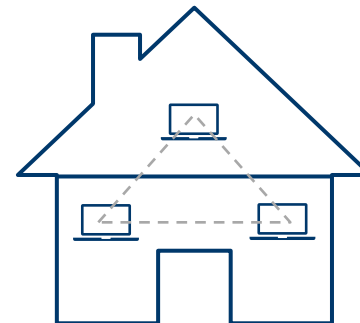
Executives are more likely to have a dedicated room. So are employees in Asian-Pacific countries (China, Japan, India).

BUT—the likelihood to have a dedicated room does NOT increase with the proportion of time spent at home.

For the most part, work-at-home employees are on their own when it comes to setting up their space; only a quarter receive assistance from their employers.



Employees of **mid-sized** companies are **more likely to have a permanent space...**



...compared to employees of **small or large companies**—who are **more likely to set space up every time** they need it.

People working from a separate dedicated space at home are more likely to leave their desks for lunch than other work-at-home employees.

The takeaways

Workers are experiencing greater flexibility in the workplace. While there are greater demands on employees to be accessible and work during their personal time, **there is also more allowance for employees to take care of personal tasks** during business hours.

Empowering employees with mobile technologies gives them greater ability to address both work and personal responsibilities without having to prioritize one over the other.

Allowing employees to bring their own device (**BYOD**) **may take some pressure off of IT** to provide certain devices – but a greater effort should be made to **secure these devices**.

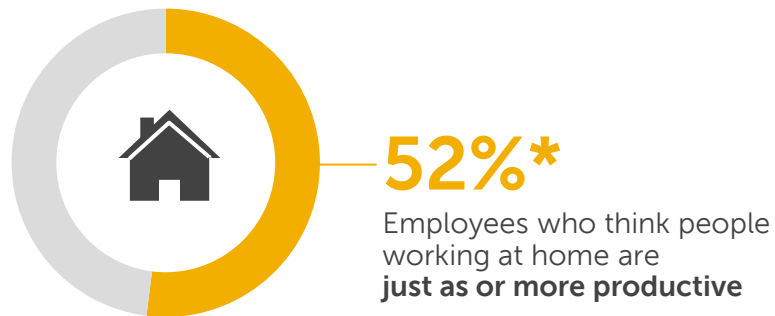
The Productivity Debate: Office Workers vs. Remote Workers



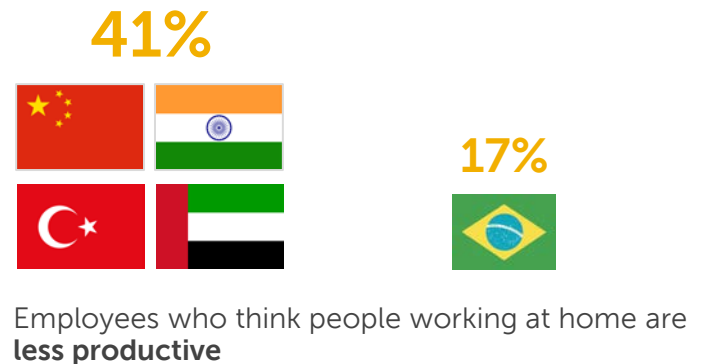
Does working from home vs. in the office have an impact on productivity?

Seven out of ten employees say they do their best work in office, at a desk.

Seven out of ten employees **who do at least 75% of their work** at home report that they do **their best work at home**.



*29% of employees in emerging markets don't know what to think



Productivity aside, working from home has other challenges

There may be costs associated with working from home that go beyond productivity.

Does it hinder career growth? 17% of home workers believe that it does—but 41% say it has had an impact.

What about opportunities for advancement—are they more limited for people who work from home? Agreement here is a little higher at 23%. The largest percentage, though, is for people with no opinion (41%).

For most employees, working from home is more of a perk than an expectation. Three-quarters view it as an extra benefit.

Working from home is not without its challenges. 84% of work-at-home employees have others in the house while they work—spouses, children, parents, and pets.

This should make for a distracting environment, but in fact, home workers who have others around are actually more likely to report being more productive than those working alone.

And the most distracting “others”? Pets.



There are benefits of working from home, including:

- Getting more sleep
- Driving less
- Feeling less stress
- Spending more time with family

The flip side is that home workers also report snacking more.



work-at-home employees aged 18–34

are more likely to say they exercise, sleep, and snack more than when they work from the office.

“Some studies show that **telecommuters don't get promoted as fast** because they don't have a lot of face time with their bosses and their colleagues so people just assume they may not be as enthusiastic or doing as much work as other people so **that's one concern.**”

Dr. Patricia Wallace, Senior Director of Information Technology at Johns Hopkins University

The takeaways

Employees work best in different locations based on their own personal preferences. It is up to employers to understand their employees as individuals and empower each of them to do their best work in their preferred environment.

Growth opportunities must be offered regardless of whether the employee works in an office or at home.

The Secret to Happy Employees? Technology

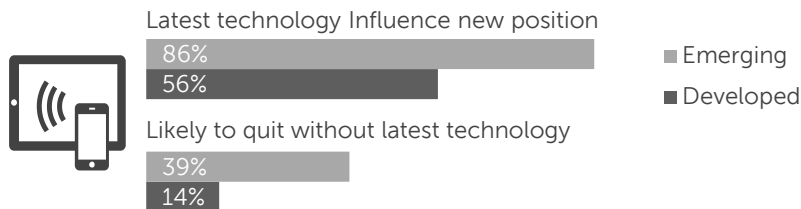


Attract, retain, empower and motivate talent with the latest technology

An equally valuable payoff is in the enhanced ability to attract, retain, empower and motivate talent.

Almost two-thirds of the workforce consider it important to have the latest technology, especially in the financial industry. In emerging markets, that result is eight out of ten.

Innovations in technology



People in **Media/Entertainment** are **more likely to quit a job over the quality of the tech**—and to be more influenced by it when considering a new position.

And why wouldn't they? Technology helps empower them to be more successful.

There are a variety of software tools that employees identify as most aiding their productivity to complete their daily work.

Productivity Tools Ranked

Developed

Instant Messaging

31%

Mobile email (personal device)

27%

Mobile email (company device)

21%

Remote access (VPN)

20%

Video conferencing (Skype)

19%

Remote desktop access

15%

Remote desktop sharing

14%

Emerging



61%



39%



39%



35%



29%



22%



26%

"A voice call tends to take 10 minutes where as an IM message could take 20 seconds. There's quite a difference in terms of productivity and using that thing. The expectations for the IM interaction are quite low in terms of social interaction, so it can be very productive."

Dr. Patricia Wallace, Senior Director, IT and CTYOnline, at the Johns Hopkins University Center for Talented Youth

Who can you afford to lose?

What are the risks of not keeping your technology current? In general, few people might leave if the technology is old - but three-quarters of them say that technology has had an influence on the way they work, which represents an opportunity to motivate.

Attracting talent may be an issue, too. Seven workers out of ten say that the quality of the available technology has at least some influence on the decision to accept a new position.

On the surface, these results don't seem to be too bleak for companies who are slow to update their technology. But take a deeper look.



The need for investing in tech updates is particularly pronounced in India, where

Half of employees

agree that they **are held back by the technology at their disposal**, and

One-third

agree that their **career growth has suffered**.

The biggest risk lies in the people who *would* be alienated by technology that is not up to par.



8 of 10

senior executives place **high importance on technology**



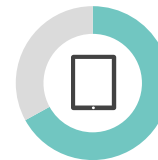
Over half

would quit a job over old tech

The quality of the tech influences the decision to accept a new position for 86% of senior executives.

Younger people also have higher expectations for current technology...

Two-thirds



...consider having the **latest and greatest tech important**

One-third



...would **leave a job over the technology**—that's **three times the rate of workers over 55**

80% of younger employees say that the quality of available tech would influence the decision **to take a new position**.

Between executives and youth—your company's present and future—maintaining investments in technology is worth the expense.



The takeaways

Employees are placing greater demands on employers to keep technology current so they can stay productive and successful.

Companies who don't invest in updated technology **risk a loss of productivity.**

Perhaps more important, **they also put themselves at a disadvantage for attracting, motivating, and retaining the talent needed** to promote growth now and in the future.

The Future of Tech in the Workplace is Bright, but Not Fully Automated

Technology will continue to promote productivity...

The forward trajectory of technological innovation isn't showing any signs of slowing down, but are we reaching a plateau for productivity improvements?

According to employees, the future of technology in the workplace is more about incremental rather than disruptive change.

Employees believe that technology will continue the trend toward mobile...



"Your company providing you with the latest and greatest says that it's a cutting edge company that's **committed to its employees and committed to you and committed to progress and the best**. It says 'We care and we think that this matters.' We live in a world where technology in and of itself conveys this extraordinary message. The more technology you have the stronger that message."

Genevieve Bell, Director of User Experience at Intel Corporation

Other technological advancements are expected to make employees' work lives easier and enhance opportunities for communication and collaboration.

Auto-correct in productivity software

74%

Voice recognition replaces keyboard

72%

Tablets replace notebooks

71%

Universal translators

68%

Keyboards and mice obsolete

66%

Biometrics will be used to access offices

63%

Remote employees monitored via webcam

61%

Paperless offices

53%

All employees offered chance to work from home

50%

Portable tech means no more desk

50%

... but (probably) won't supplant a human workforce

Advancements in technology aren't likely to replace the need for humans in the workplace. Two-thirds of workers believe that technology will eventually hit a limit on the ability to improve productivity (although not any time soon).

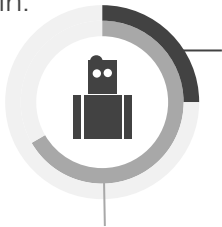
And half of workers agree that technology is fine, but some things are just better done by people.



One-in-three

workers globally **thinks their job will be fully automated during her lifetime...**

...but this varies widely depending on what part of the world they are working in.



In **developed markets**, only **a quarter** of employees predict full automation

but in **emerging markets**, it's **more than half**. In Turkey, nearly two-thirds of workers see their jobs marching toward automation.

Is this a bad thing?

Four-in-ten

Employees in **emerging markets** think that the **development of new technology is key to improving life** as we know it.



On the other hand, roughly the same number also say that technology is fine, but there are **some things that are better done by people**.

In **developed markets**, **two-thirds of workers hold that belief**.

However, that perspective may shift as the workforces ages; half of employees aged 18-34 don't share that attitude.

But even as technology reaches a plateau in the degree to which it assists workers, its influence in career planning is likely to grow.

More than half of employees believe that sometime in their lifetimes, big data will assign promotions and determine career paths, and just under four in ten believe that recruiting will be done with fully automated algorithms instead of human recruiters.

"First of all I think **people are the backbone of work getting done** and so I agree that the people part of getting work done is incredibly important today and in the future. The trick is as those people want to be closer to the customer...as those people need to be mobile and be out and about. I think **technology is an enabler**. Technology isn't the doer necessarily."

Steve Lalla, Vice President & General Manager at Dell

So what will change for the workforce?

There will likely always be a role for the central office according to today's workforce. More than two-thirds believe the central office will continue to exist in their lifetimes.


And when people report to this office, they will likely use biometrics—such as fingerprints or retina scans—to access the building.

But that doesn't mean that's where everyone will go. Half of workers believe that all employees will be offered the opportunity to work from home (but they'll be monitored via webcam).



What's the verdict? It depends on who you ask

When it comes to predicting whether technology will be beneficial or detrimental in the future, workers are split into two camps.

 **Upsiders**
44%

of employees globally

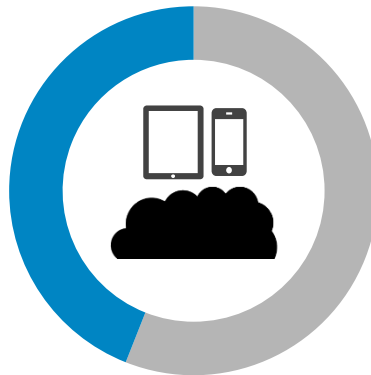
Upsiders believe that most **problems can be solved with technology**, and that technology brings people together.

Technology is the key to improving life as we know it, and they wouldn't be happy without it.

They're **mostly in emerging markets**, especially China, India, and UAE.



They hold positions with higher levels of decision-making and authority (CEOs, VPs, other executives). They also **tend to be younger**.



Downsiders 
56%

of employees globally

Downsiders are nervous about the increasing role of technology in our lives. They think that the proliferation of technology separates people and makes people less important.

Technology is advancing too fast for us to keep up with it. **They don't trust technology companies** to be responsible with their data, and **they fear** that Big Data will result in **the end of personal freedom**.

Downsiders are the **majority in developed markets**, especially the US, UK, Japan, and France, where technology already has a strong foothold in the workforce.



They are in non-management roles (technical, administrative) **and in public industries** (healthcare, education). **They also tend to be older**.

Who's right? Time will tell. **But don't be surprised if the answer is... both.**

The takeaways

Employees expect that technology will keep evolving and will provide different benefits and capabilities to the workforce, but will not fundamentally change the way in which people are working today.

Employees perceive there will always be a role for humans in the workplace. Technology can't do everything but it will continue to serve and thrive as an enabler for improving workers' productivity, collaboration and communication.

Country Executive Summaries

The Evolving Workforce
Report #1: The Workforce Perspective





United States

There is an evolution happening in the US workplace: the “office” isn’t always defined by a desk within an employer’s walls, job responsibilities are being met at home or at client locations or even in public spaces, mobile technologies and alternative interfaces are growing more prominent. In spite of all this, employees in the United States still have a somewhat traditional workplace penchant: they often work in an office using desktops—and they prefer desktops.

But why the traditional inclination? Productivity and interaction, according to American workers. Desktops provide higher levels of performance, and employees are more productive when working from an office (few work from home regularly). Besides, there is a preference for personal interactions over remote ones.

Yet, the trend is well established—more and more, work is bleeding into personal time, and vice versa. As a result, employees get more flexibility and a satisfying work/life balance if empowered for success by having the right technologies for the demands of this new paradigm. The mobile technologies they currently use (laptops, tablets and smartphones) tend to be more prevalent for personal use—but there may be an opportunity for other technologies, such as 2-in-1s, to provide both performance and mobility that workers will find beneficial.



One Size Doesn't Fit All



Desktops top the list of devices used for getting work done in the office in the United States. In fact, just under three-quarters of employees use them for work and almost as many say it's their most preferred device.

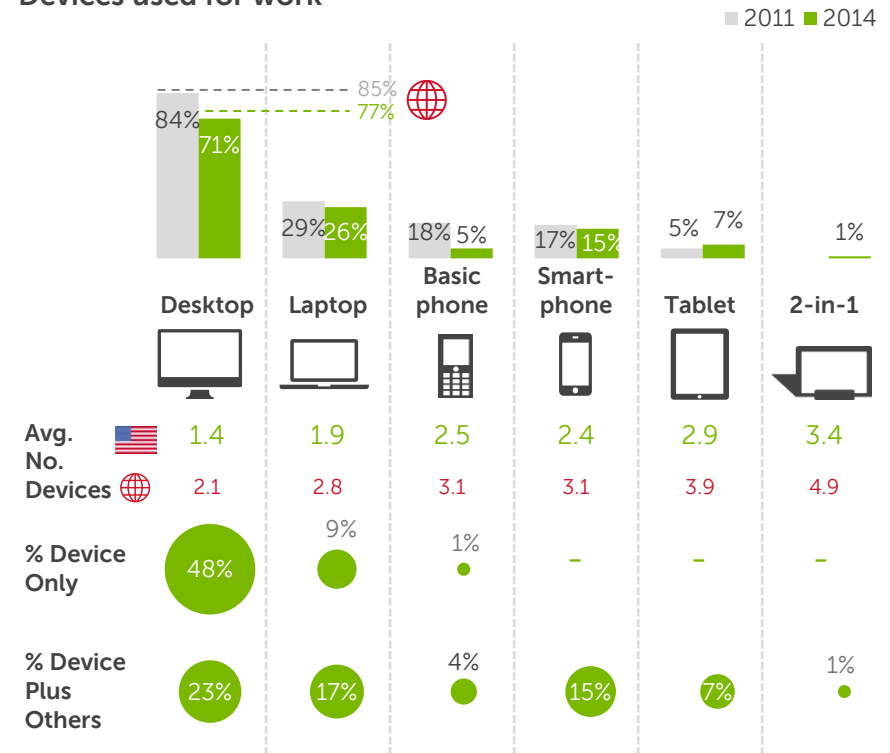
Why? Because it performs. Performance is the most important attribute people look for in a work device, followed by software compatibility.

But the desktop trend is down. Only two short years ago, 85% of workers primarily used desktops, a number that is falling fast. Workers are increasingly taking advantage of other devices that fit their changing needs.

And while they aren't yet widely adopting tablets or other touchscreen devices for work—the rise of these technologies, particularly tablets, is emerging for personal use.

Interestingly, American workers show the lowest averages for multiple device use for work compared to all other countries globally. 48% of American workers indicate they only use the desktop for work and use no other device. Furthermore, no one only uses a smartphone, tablet or 2-in-1 as these are always used in concert with an additional device.

Devices used for work*



The Office is King, but it's a Jungle Too



By far, most work is being done in the employer's office. Almost all employees spend at least some time there, and more than two-thirds spend at least 75% of their time there (compared to just over half globally).

Few American workers work outside of the office—only 26% work from home, 16% from an external location, and 9% from public venues. Compared to global trends or even those in other developed countries, these statistics are staggeringly low.

Not only is the office the most common place for getting work done, it's also the most conducive to getting work done. Seventy percent of workers say they do their best work there (compared to only 14% who say they do their best work at home).

Part of the appeal of the office is personal interaction vs. more remote options: In-person meetings win out over online meetings (6-to-1 in the US vs. 3-to-1 globally) and phone calls are preferred to instant messaging (6-to-1 in the US vs. 2-to-1 globally).

Working hours spent in different locations

US employees spend...

79%

in their employer's office



43% Emerging
72% Developed

26%

at home



68% Emerging
31% Developed

16%

at external location (client)



57% Emerging
26% Developed

9%

at public place



56% Emerging
17% Developed

Work Life + Personal Life = Life



One-quarter of US workers say they spend some of their time working from home (vs. one-half globally).

Many who don't work from home on a regular basis still take calls or check email after hours, suggesting that the lines between work and personal life are blurred.

And the blurred lines spill over into device usage as well: 1-in-3 workers are allowed by their employers to use personal devices for work (vs. over one-half globally). A few handle their company's disallowance by doing it anyway: 22% of workers use personal devices for work without their employers' knowledge (vs. 43% globally).

Without a doubt, workers are adapting to a new paradigm where work and life fuse together—but in the US, it is happening at a somewhat slower pace than in some other markets.

Check/take more than 1 time a day while at home (outside of business hours)

Work email



Work calls



- US
- Emerging Countries
- Developed Countries

The Productivity Debate: Office Workers vs. Remote Workers



In the US, the remote vs. office debate rages on. Overall, 4-in-10 employees think that those working from home are just as productive or more than those in the office, but another one-third are undecided on this topic.

There will always be a role for the office according to today's American workforce, with 77% believing the office will continue to exist at least in their lifetimes (vs. 69% globally).

For most employees, working from home is more of a bonus than an expectation.

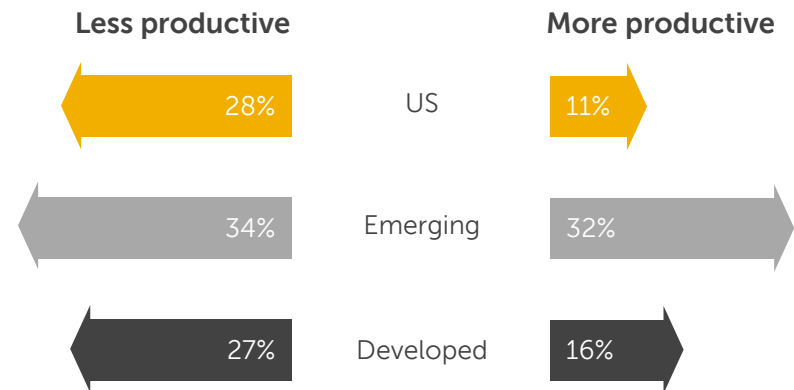


9-in-ten

view it as an **extra benefit** (vs. 7-in-ten globally)



Overall, US employees believe people working at home are...



The Secret to Happy Employees? Technology



Compared to workers in other markets, US workers place less emphasis on having the “latest and greatest” technology in the workplace (only one-third consider it important vs. nearly two-thirds globally). One potential reason for this may be that, in general, employees in the US are already provided quality computing devices making the need for something even better a lower priority.

What are the benefits of keeping up with the latest technologies? Quite a lot in terms of worker disposition: half claim that technology has a positive influence on the way they work, suggesting that keeping up with new formats and capabilities supports a happier workforce. But don’t expect it to drive worker retention - very few US workers would leave a company because of sub-par technology.

More importantly, technology can be a magnet for talent. About half of US workers say that the quality of the available technology would have at least some influence on their decision to accept a new position.

Extremely/very important having the latest and greatest technology at work

US

35%

Emerging

82%

Developed

41%

The Future of Tech in the Workplace is Bright, but Not Fully Automated



US workers believe that technology will continue to bring us options in mobility and remote connectivity (nearly 9-in-10 expect tablets to completely replace laptop computers), and future advancements are expected to make work life easier and enhance opportunities for communication and collaboration.

But technology won't be an endless fountain of benefits. In fact, two-thirds believe it will hit a limit in its ability to improve productivity (although not any time soon).

What about the threat of technology replacing Americans in the workplace? Not a problem, say most workers. Only 1-in-5 think their jobs will be fully automated in their lifetimes, and just over two-thirds agree that while technology is fine, some things are just better done by people (vs. one-half globally).

68%

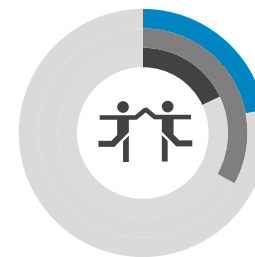
US employees think technology is fine but that **there are some things that are just better done by people**



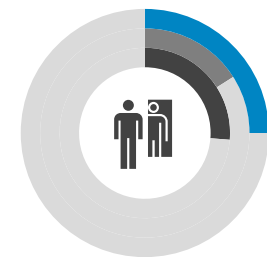
45% Emerging
65% Developed

The ongoing debate? Whether technology works to bring people together (22% of US workers believe so) or separate them (25% say this).

Technology brings people together



Technology separates people



■ US
■ Emerging
■ Developed



United Kingdom

It's true, the workplace is changing. "Office" is no longer only at an employer's site. Work is no longer solely done in a designated location (it is carried out at home, at external locations, even public areas). All this means that mobile technologies are increasingly catching on—but workers in the UK still hold onto their traditional workplace notions of "office" as a specific location.

Interestingly, companies in the UK are some of the quickest globally to adopt open floor plans that enable employees to collaborate without office or cubicle barriers: a trend that capitalizes on physical—not virtual—presence. And personal interactions are preferred over remote options.

In line with their traditional mindset, most UK workers still use and prefer desktops over other devices; having the latest technology is less important to them. However, workers don't shy away from mobile technologies for personal use - laptops, tablets and smartphones are prevalent outside of work. These types of technologies can be leveraged when employers do call for UK workers to be accessible during their personal time.



One Size Doesn't Fit All



In the office, the desktop rules - nearly 3-in-4 UK workers use desktops for work and prefer them. And while the desktop is far from sleek, it performs, and that's what's important for work and presumably a big driver of preference. In fact, performance trumps battery life at a rate of 10 to 1 in terms of importance!

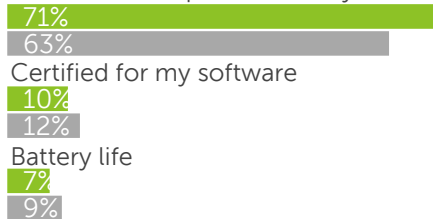
What isn't used frequently? Tablets, 2-in-1s, and touchscreen interfaces. These haven't made it into UK workers' current use practices, yet, but there is clear evidence of growing interest as 17% would prefer to use a tablet at work.

UK workers show some of the lowest averages for multiple device use compared to all countries globally. 46% of UK workers indicate they only use the desktop for work and no other device.

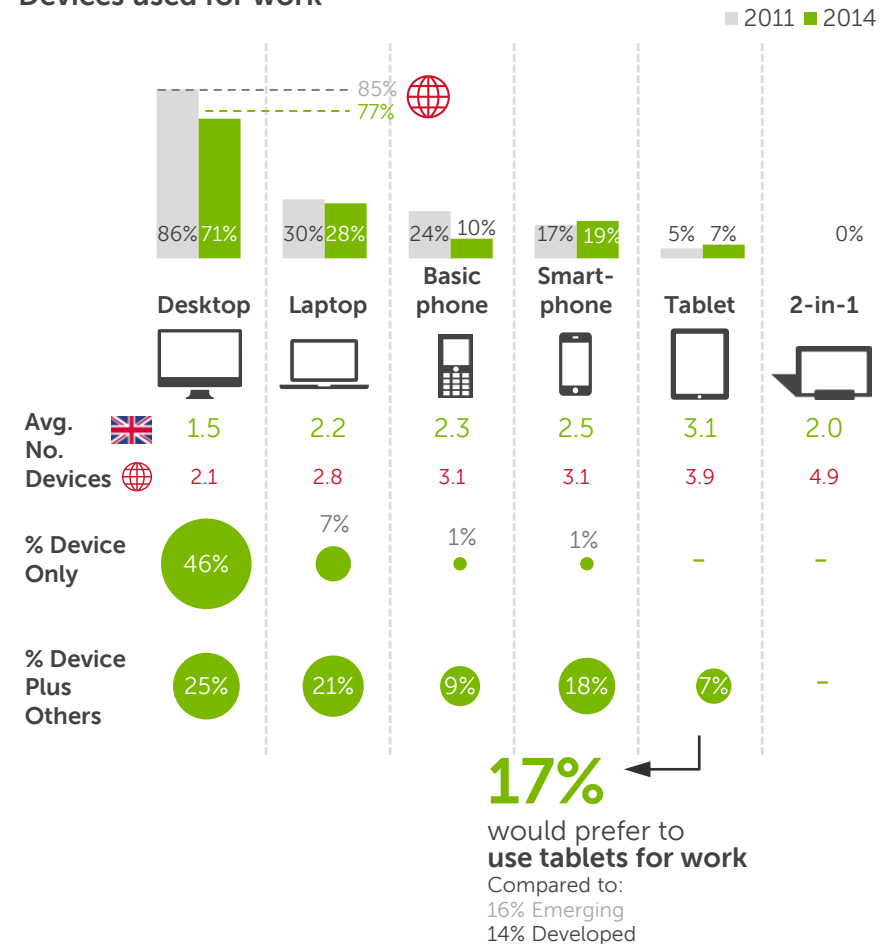
And while desktops are the go-to devices for work, during their personal time UK workers will be at their laptops or checking their smartphones—not sitting in front of their home desktop computer. This suggests that during personal time, UK workers value mobility and flexibility, and that may just spill over into work-life down the road.

Most important aspect of work device

Performance (speed, memory and storage to download and access files)



Devices used for work*



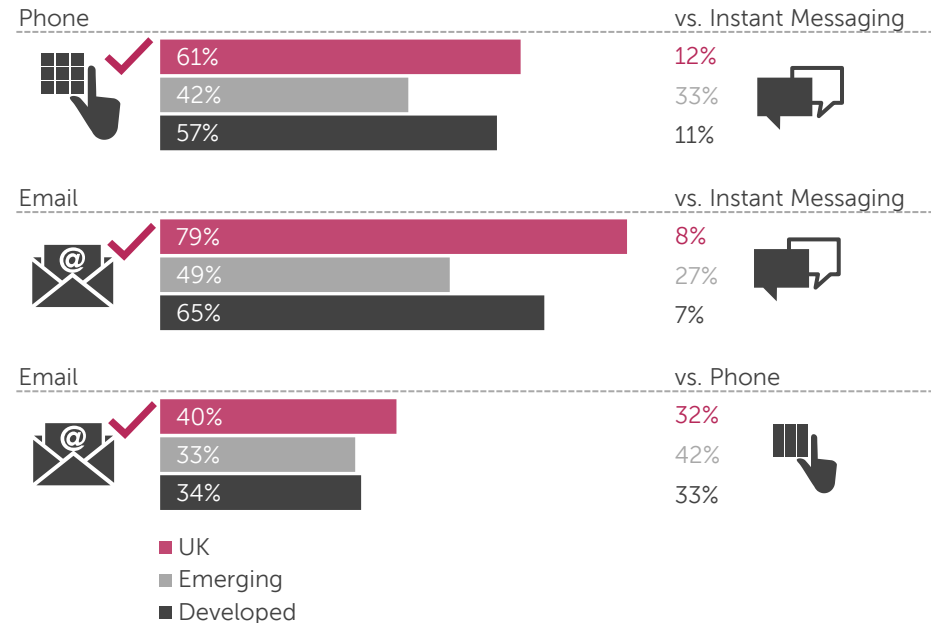
The Office is King, but it's a Jungle Too

During office hours, you'll most likely find UK workers congregating at their employers' offices. In fact, almost all spend at least some time physically present in the office, and about two-thirds spend at least 75% of their time there (compared to just over half globally). These numbers are indicative of a working style that values personal exchange.

What makes UK workers come into the office? Perhaps there are a number of factors, but one very important motivation is that it promotes high performance. Sixty-five percent of workers say they do their best work in the office (compared to only 14% who say they do their best work at home).

What communication channel doesn't promote productivity? Instant messaging. UK workers feel that picking up the phone or sending an email is much more helpful than instant messaging. And in-person meetings are preferred to online meetings (6-to-1 in the UK vs. 3-to-1 globally). The need for personal connection and dialogue that goes beyond short quips is still strongly valued in today's workplace.

UK preferred communication methods



Work Life + Personal Life = Life

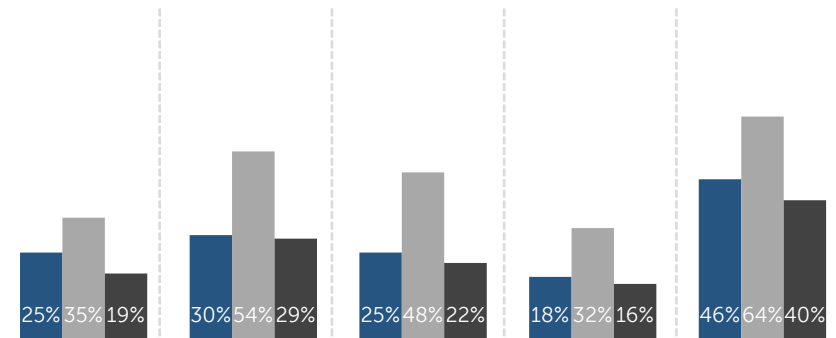


The trend is set: work and personal life are no longer clearly demarcated. Employees are working during their personal time and doing personal tasks while at work, thus creating their own flexibility to meet personal and professional goals. A full 46% are doing personal tasks while at work, and 25-30% are taking work home or using their personal devices for work.

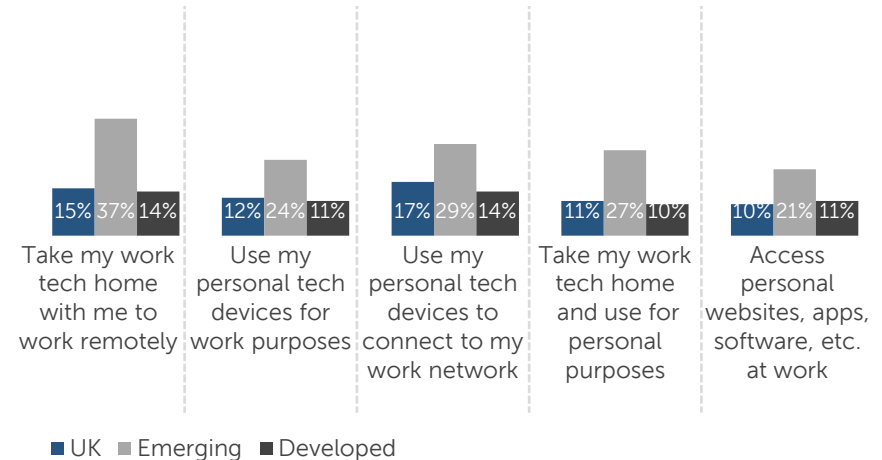
But perhaps this isn't in the cards for the long-term. UK workers don't expect to do these things in the future at nearly the same rate as today.

How does today's trend impact worker mobility? A great deal—as work is now location-agnostic. One-third of UK workers say they spend some of their working hours from home (vs. one-half globally). Work intrudes on personal time, but to a smaller extent in the UK than elsewhere with 26% taking work calls (vs. 52% globally) and 41% checking work email (62% globally) after hours.

Do currently



Expect to do in the future



The Productivity Debate: Office Workers vs. Remote Workers



In general, the sentiment does not lean in favor of home-workers, which suggests that the office is here to stay. A full three-quarters of UK workers believes that the office will continue to exist at least in their lifetime (vs. 69% globally).

Home-working tends to be viewed as a perk in the UK (8-in-10 vs. 7-in-10 globally), not a basic expectation. For employers, this suggests that offering flexibility to workers can be used to reward, retain, and attract talent—as long as there is a favorable balance to promote productivity.



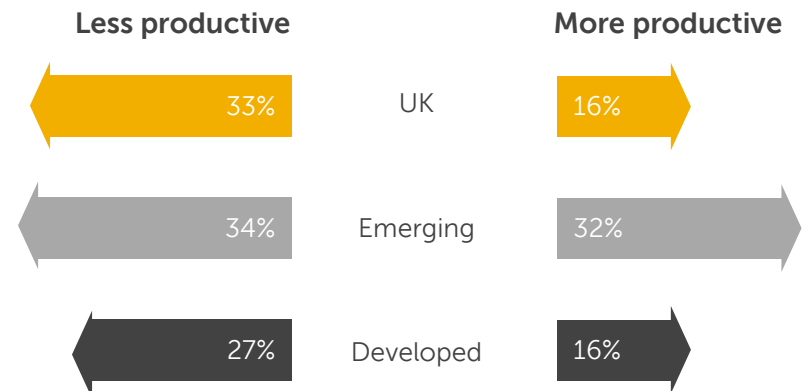
8-in-ten

view it as an **extra benefit** (vs. 7-in-ten globally)



The opinions of employees regarding those who work from home are still very traditional. Many employees feel that people working from home are less productive than those who work in the office by 2-to-1.

Overall, UK employees believe people working at home are...



The Secret to Happy Employees? Technology



Workers in the UK want technology to work for them. If it doesn't meet their standards, there's a 4-in-10 chance that they will look for other employment opportunities, presumably where technology better suits their needs. While that isn't a staggering number, it still suggests that technology has an impact on worker retention. And UK workers do factor technology into their decisions to take new work opportunities (at least half say it influences their decision in some way).

It isn't just about having the latest and greatest technology at their disposal; only 4-in-10 actually care. What these findings imply is that workers want technology to work for them, to enhance their lives and to make them productive. It's matching the tool to the need that makes the difference.

UK employees say...

It is important to have the latest and greatest technology at work



They would **not** likely quit job if the technology didn't meet with standards



The technology available would **not** influence decision to take a new position



- UK
- Emerging
- Developed

The Future of Tech in the Workplace is Bright, but Not Fully Automated

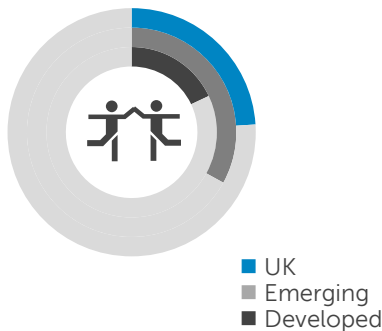


Most UK workers share the prediction that technology will continue the trend toward mobile—the key is for this trend in technology to make employees' work lives easier and more collaborative.

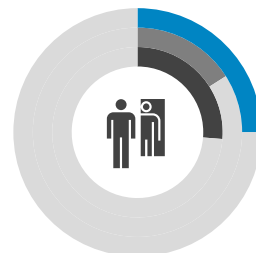
Still, workers recognize that technology's impact is limited. Nearly 3-in-4 in the UK say that there are some things that are just better done by people. This widespread sentiment is much more prominent in the UK than in other developed markets (65% think this is the case in developed markets).

Does technology connect people or dissociate them? The jury is out on this one—UK workers are split in their opinion. One-quarter says technology connects, another one-quarter says it separates. The reality, possibly, is a bit of both.

Technology brings people together

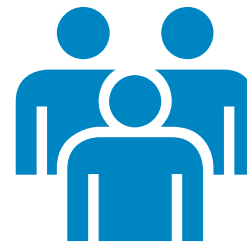


Technology separates people



73%

UK employees think technology is fine but that **there are some things that are just better done by people**



45% Emerging
65% Developed



France

Around the world, the workplace is changing, and it's no different in France. The "workplace" can be defined as anywhere, and the French are more likely to take advantage of opportunities to get work done outside of the traditional office walls than others in developed countries.

Some elements of the French workplace are still bound by tradition. Most still use and prefer to use desktops, and say they are more productive when working from an office.

Personal interactions are preferred over more technology-oriented options, and this is reflected in their technology attitudes. Compared to other countries, the French are the most likely to feel that "technology separates people", so it will be important to continue to foster personal interactions as technology in the French workplace advances.

As French employees move toward being accessible and working during their personal time, mobile technologies—either work-provided or personal—promote greater flexibility and facilitate more personal freedoms.



One Size Doesn't Fit All



As with global findings, the desktop is the top device for getting work done in the office in France. It is by far the most used and the most preferred. Also similar to global, desktop use has fallen in the past two years as more portable devices have gained traction. Compared to the global result, the desktop decline is sharper in France.

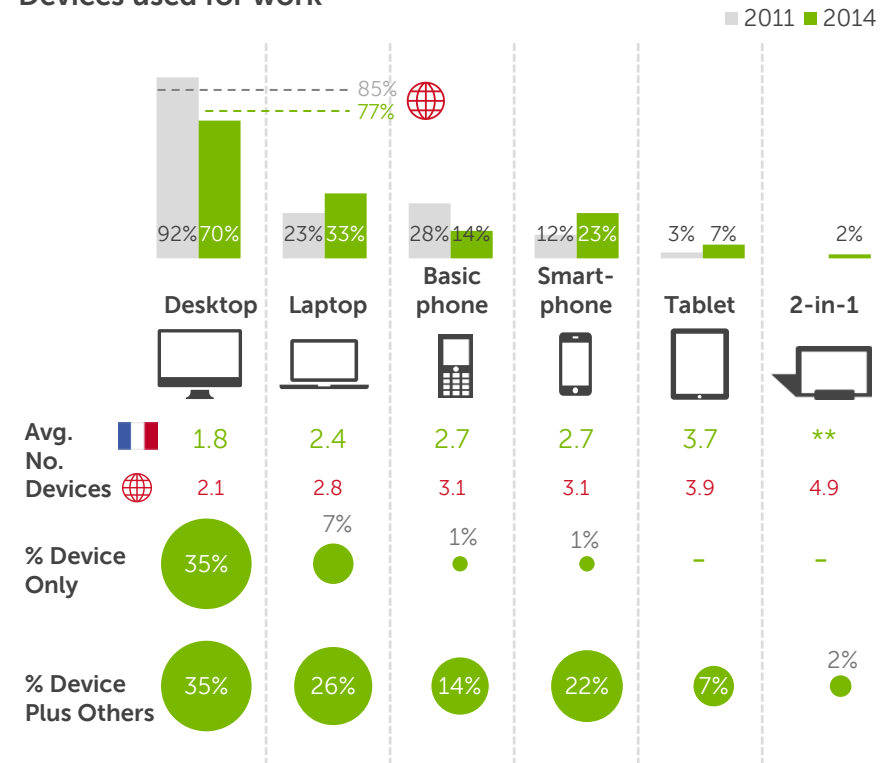
French workers also use slightly fewer devices on average than their global counterparts, but still typically use one than one device for work.

Tablet and 2-in-1 use is generally low, as is touchscreen use when it comes to work.

When it comes to personal purposes, laptops (75%) and smartphones (68%) are used more often than desktops (60%).

Regardless of the device being used, the top priority for selecting is performance. For those whose primary device is a desktop, the second priority goes to software compatibility—but for laptop users, it's battery life.

Devices used for work*



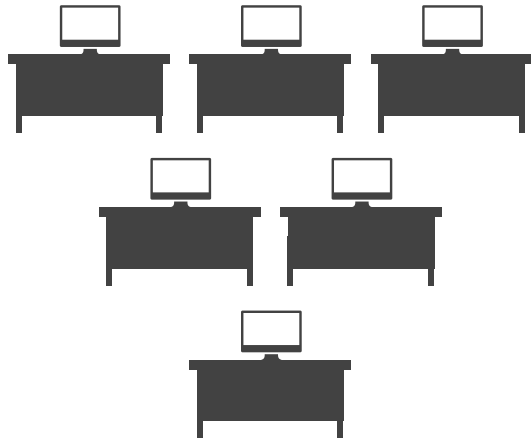
The Office is King, but it's a Jungle Too



By far, most work is being done in France in the office of an employer. Almost all employees spend at least some time there, and six-in-ten spend at least 75% of their time there (which is comparable to the global workforce).

Not only is the office the most common place for getting work done, it's also the most conducive to high performance. 62% of workers say they do their best work there. Only 22% say they do their best work at home—but that proportion is larger than other countries (only 14% globally).

French employees prefer personal forms of communication with in-person meetings and phone calls preferred to alternative options.



In-person meetings

win out over online meetings
(5-to-1 in France vs. 3-to-1 globally)



Phone calls

are preferred to instant messaging
(5-to-1 in France vs. 2-to-1 globally)

Work Life + Personal Life = Life



Like the global workforce, one-half of French employee say they spend some of their working hours from home (this percentage is slightly higher than other developed countries).

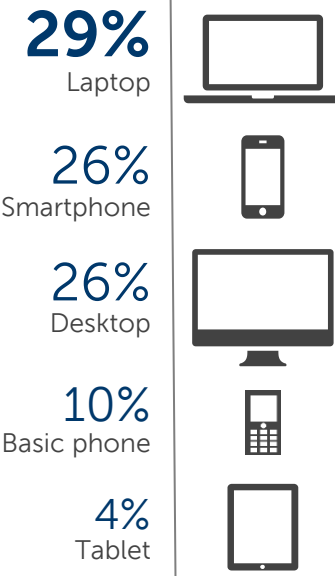
Employees likely to work at home



Even those who don't necessarily work from home take calls (32% France vs. 52% globally) or check email (53% France vs. 62% globally) after hours.

One-half of workers are authorized by their employers to use personal devices for work (again, a higher percentage than other developed countries). However, some employees address this on their own with 33% of workers secretly use personal devices for work without informing their employers (vs. 43% globally).

Bring your own devices used



The Productivity Debate: Office Workers vs. Remote Workers



Overall, many French employees think that those working from home are just as productive or more than those in the office. One-fourth are undecided on this subject.

There will always be a role for the central office according to today's French workforce, 73% of whom believe the central office will continue to exist at least in their lifetime (vs. 69% globally).

Perceived productivity of people working from home



For most employees, working from home is more of a perk than an expectation.

7-in-10

view it as an **extra benefit**
(a slightly lower percentage than the US and UK)



The Secret to Happy Employees? Technology



French workers are less wooed by the newest technology than their global counterparts—just under half of the French workforce consider it important to have the latest technology (vs. nearly two-thirds of the global workforce). Employees may already have sufficient technology to do their jobs making the motivations for something newer to be minimized.

However, seven-in-ten feel that technology has had a positive influence on the way they work.

So why invest in technology? After all, fewer than one-in-five would leave a job over the quality of the available tech—that's lower than the global average of one-in-four.

But nearly two-thirds say that the quality of the available technology would have at least some influence on their decision to accept a new position.

More importantly, there are critical subgroups, that are at greater risk. Three quarters of younger workers and those in management roles are influenced by the quality of tech—and they're also more likely leave over it.

But even within these subgroups, the global results are more dire, where half of executives and one-third of younger employees would quit over available tech.



Latest technology Influence new position



Likely to quit without latest technology



- Total
- Senior Executives
- Young (18 - 34)

The Future of Tech in the Workplace is Bright, but Not Fully Automated



Employees believe that technology will continue the trend toward mobile, with roughly nine out of ten of them expecting tablets to completely replace laptop computers.

9-out-of-10

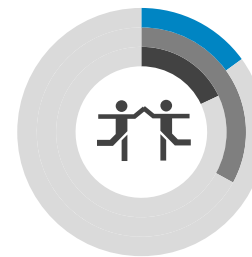
expect **tablets** to completely replace laptops



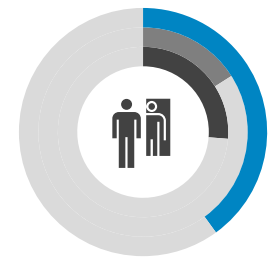
Three-fourths believe that technology will hit a limit on the ability to improve productivity (although not any time soon). And advancements in technology won't replace the need for humans in the workplace—only one-fourth think their jobs will be fully automated in their lifetimes.

But in France, there is some resistance to technology: only 15% feel technology brings people together, while 40% feel technology separates people.

Technology brings people together



Technology separates people



■ France
■ Emerging
■ Developed

Similar to global consensus, six-in-ten employees agree that technology is fine, but some things are just better done by people.





Germany

German workers hold onto the traditional notions of “the workplace” despite the changing landscape that defines new locations where work takes place, new office layouts, and new technologies that serve to facilitate mobility and connectivity. They still spend most time within the walls of their employers’ sites, and often they sit in a traditional office layout with offices and cubicles.

Their technology is, for the most part, traditional, too. They still use and prefer to use desktops for work and they value performance. Of course, desktops don’t lend themselves to mobility, so most continue to work at the office—few work from home. That’s not a disadvantage, however. On the contrary. German workers say they are more productive when working from an office, and they prefer personal interactions over remote ones.

So what about the trend toward mobile technologies? Right now, usage of laptops, tablets and smartphones is prevalent for personal use. This implies that there’s an established avenue for allowing German workers to leverage their experience with mobile for greater flexibility as work demands continue to spill over into personal time.



One Size Doesn't Fit All



Not only is the desktop the most commonly used device at work, it's also German employees' most preferred—over three-quarters prefer it to other devices.

The attraction of the desktop likely stems from the emphasis on performance in a work device. Performance is the most important attribute that German workers look for, and with good reason for meeting the demands of today's job responsibilities.



66%

prefer the desktop

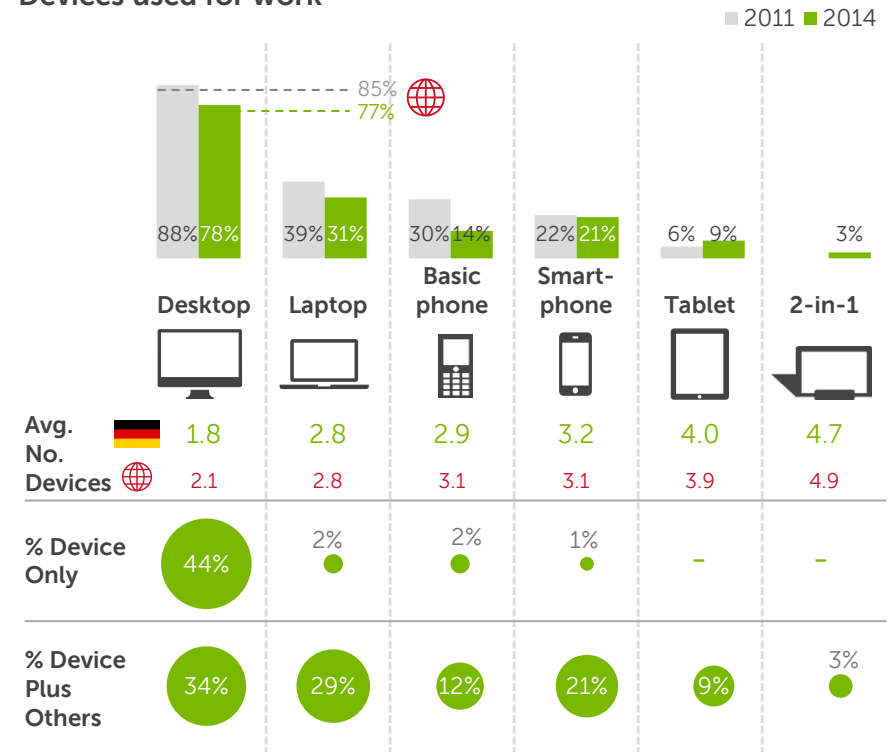
55%

24% prefer the laptop

What about the mobile trend? That's not likely going to change their opinions—not only do German workers prefer their desktops, they also have a weaker preference for mobile technologies in general vs. their global counterparts (24% prefer laptops vs. 29% globally).

This isn't the case for personal use, however. When not working, laptops and smartphones garner much more usage than the desktop—which seems to be relegated to the office cubicle.

Devices used for work*



The Office is King, but it's a Jungle Too



The German workplace is still very traditional—most workers continue to be physically present in an office; most all spend at least some time there, and two-thirds spend at least 75% of their time in an office (compared to just over half globally).

The office is also where German workers perform at their finest, which is likely a major reason they are so frequently there. Over 2-in-3 workers say they do their best work in the office (compared to only 16% who say they do their best work at home, which is relatively high compared to developed nation standards).

68%

say they do their best work
in the office



71% Emerging
69% Developed

16%

say they do their best work
at home



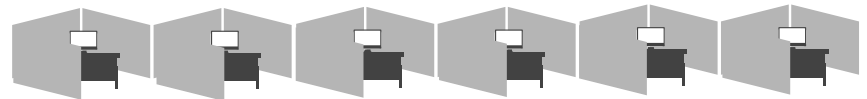
12% Emerging
15% Developed

The office layout itself is quite traditional—there are far more offices with traditional floor plans (offices/cubicles) in Germany than in any other country. More employees (43%) also report that this floor plan increases their productivity and effectiveness compared to their open floor plan counterparts (35% fully open/31% mixed floor plan), suggesting that perhaps this element of the workplace tradition should remain intact and doesn't warrant change.

58%

have traditional layout (offices and cubicles)

Compared to:
37% Emerging
40% Developed



Together with office preference is the preference for more personal communication options. In-person meetings win out over online meetings (6-to-1 in Germany vs. 3-to-1 globally) and phone calls are preferred to instant messaging (6-to-1 in Germany vs. 2-to-1 globally).

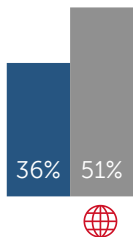
Work Life + Personal Life = Life



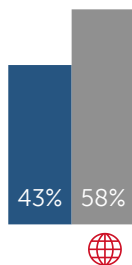
As a rule, German workers are reluctant to mix their work with personal technology and personal tasks with work technology. Sixty-four percent don't take work technology home with them to work (compared to 49% globally), and 57% don't use their personal devices for work (compared to 42% globally).

Currently do or expect to do in the future

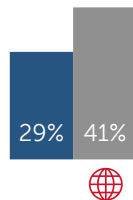
Take my work tech home with me to work remotely



Use my personal tech devices for work purposes



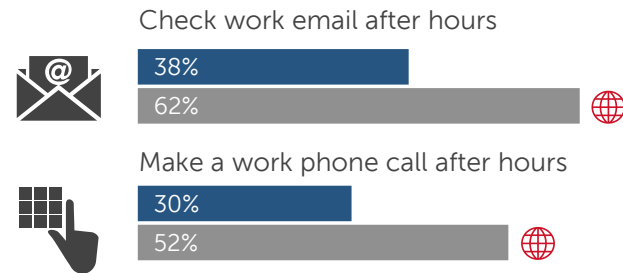
Take my work tech home and use for personal purposes



Access personal websites, apps, software, etc. at work



That doesn't mean they aren't working remotely, however. Among those who don't necessarily work from home, 30% take calls (vs. 52% globally) and 38% check email (vs. 62% globally) after hours. They do mix work with personal, but at a lower frequency than other workers around the world.



One-third of workers are authorized by their employers to use personal devices for work (vs. over one-half globally). Few employees handle their company's lack of BYOD policy by doing it anyway: 26% of workers use personal devices for work in secret (vs. 43% globally). Security and data privacy concerns are likely a reason for these low numbers, but surprisingly only 18% of personal devices used for work are secured by the company's IT department.

The Productivity Debate: Office Workers vs. Remote Workers



Half

Of German employees think people working at home are **just as or more productive**

But there will always be a role for the central office according to today's German workforce...



77%

believe **the central office will continue to exist** at least in their lifetime

61%

For most employees, working from home is not an expectation...



Three quarters

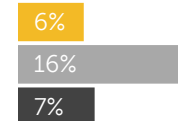
view it as an **extra benefit** (similar to globally)



Germans find value in the workplace and don't expect the office to go away nor employees to work from home as a rule. Among those who do expect these changes, many don't believe they'll happen in their lifetime (53% think that central offices will cease to exist in the distant future, 64% think that eventually—but not anytime soon—all employees will be offered a chance to work at home).

Employees believe will happen by the time they retire:

All employees will work from home and there will be **no central office**



All employees will be offered a chance to work from home



- Germany
- Emerging
- Developed

The Secret to Happy Employees? Technology



Half

Of German employees think
**it is important to have the
latest technology**

3/5

Technology isn't going to make or break employee relationships with their companies. Few people would actually leave their jobs on account of old technology. Still, 2 in 3 admit that technology has had an influence on the way they work. In Germany, technology tends to influence those in higher levels of the organization vs. lower levels, which is a bit different from other developed markets.

Technology also works as a magnet for top talent—two-thirds of German workers say that the quality of the available technology in some way influences their decision to accept a new position. It is clearly one of the many factors that employees consider.

Influence of technology on work



33%

are more productive

66% Emerging
28% Developed



32%

Communicate faster with co-workers

64% Emerging
29% Developed

23%

Communicate faster with others
(customers, partners, vendors, etc.)

53% Emerging
19% Developed



18%

Collaborate easier with others
(customers, partners, vendors, etc.)

48% Emerging
15% Developed



11%

**Have more virtual meetings and
fewer in-person**

27% Emerging
8% Developed

The Future of Tech in the Workplace is Bright, but Not Fully Automated



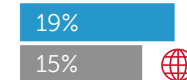
Despite technological advances, people are not going away any time soon, say German workers. Three-fourths believe that technology's ability to improve productivity will plateau at some point, and humans won't be replaced by technology (only 1 in 4 believes their jobs will be fully automated in their lifetimes). The human touch is still, and always will be, valuable.

But there are some clear concerns about technology in the workplace, as 29% of German workers say that the proliferation of technology has reduced the importance people (vs. 23% globally). There is also some concern about trust and privacy of data held by tech companies in the form of big data.

The proliferation of technology has reduced the importance of people



Big data will result in the end of personal freedom



I do not trust technology companies to be responsible with my data



Two-thirds

German employees think technology is fine but that **there are some things that are just better done by people**





Russia

Though the global workplace landscape is evolving, Russian workers still hold fast to many traditional workplace habits and practices.

Most Russian workers still use desktops for personal and business purposes. And they say they are more productive when working from an office rather than from a remote location, like home. They prefer personal interactions over other forms of communication, suggesting that they may be reluctantly adopting the technology that enables remote working. And though technology is fine, they hold fast to the belief that some things are just better done by people.

Still, Russians spend a great deal of time working from home and other locations, indicating that they are not unaffected by the changing workplace trends and are available to work after office hours. In light of these trends, Russian employees see the benefits that technology can offer to them – their use of either employer provided or personal mobile technologies provides them with flexibility to do their work effectively and enjoy their personal time, too.



One Size Doesn't Fit All



In line with global trends, the desktop is the top device for getting work done in the office in Russia. As many as 8-in-10 employees use it for work, and 6-in-10 identify it as their preferred device. About half of employees (53%), however, use multiple devices in conjunction with their desktops.

Performance is by far the most important aspect Russian employees look for in a work device, likely driving the prevalence of desktops. Software certification comes second.

On their personal time, Russian workers still use desktops more frequently than laptops (but not by much); and smartphones and tablets have relatively high adoption at 68% and 50%, respectively. Tablets and 2-in-1s are used rarely for business purposes, but there is growing interest in using tablets for work: preferences for these devices are higher than in other countries, heralding possible future trends.

Most important aspect of work device

Performance (speed, memory and storage to download and access files)



Battery life

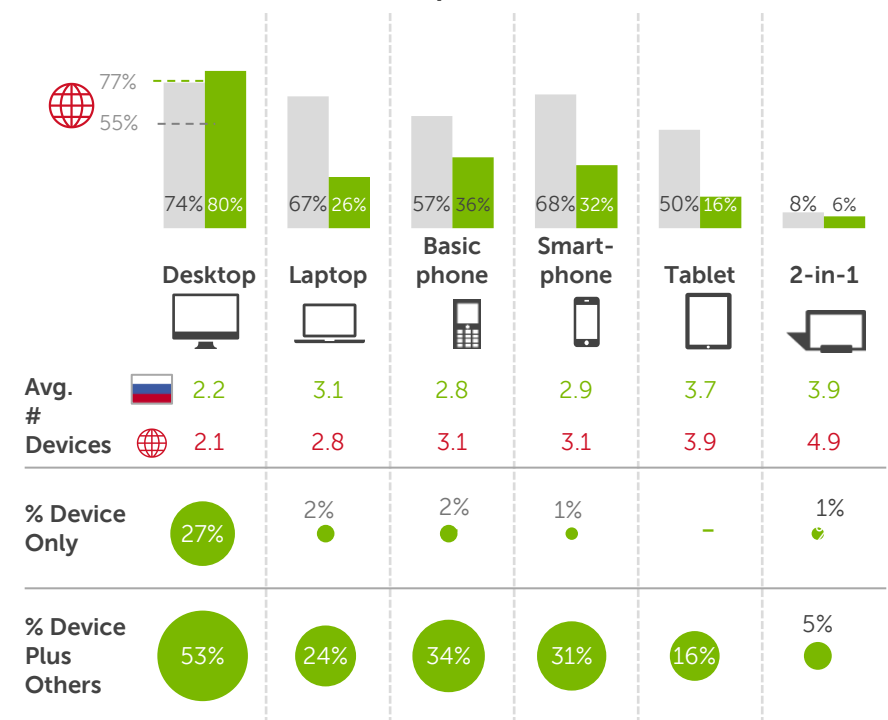


Certified for my software



■ Russia ■ Emerging ■ Developed

Devices used for work and for personal



20%

would prefer to use tablets for work

Compared to:
16% Emerging
14% Developed



The Office is King, but it's a Jungle Too



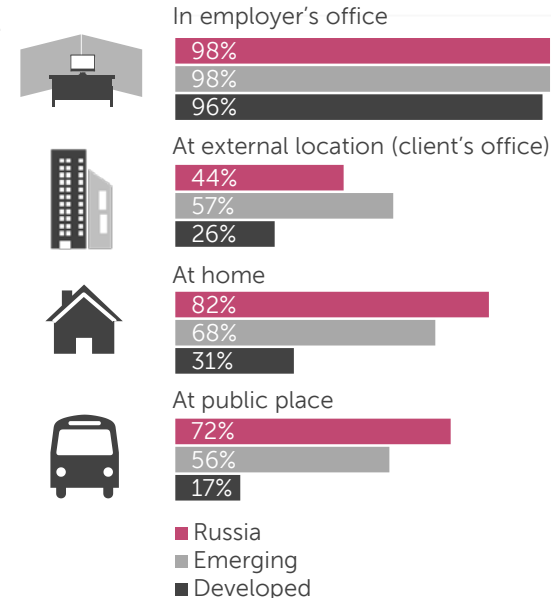
Most work in Russia is being done in the office of an employer, and nearly all employees spend at least some time there. However, only 1-in-5 spend at least 75% of their time there, which is fewer than in most other emerging markets.

While most everyone spends time at the office, many also work from home or other locations, in particular public places, which reflects the changing landscape of the working environment.

Though Russians work in a variety of locations, many say the office is the most conducive to productivity – 65% feel they do their best work there. This may be influenced by the fact that Russia has a higher proportion of traditional offices (47%) than nearly all other emerging markets.

Communication channels that involve personal interactions are generally preferred over more remote options, which may be a factor in their choice to work from the office. In-person meetings win out over online meetings (6-to-1 in Russia vs. 3-to-1 globally) and phone calls are preferred to instant messaging (2-to-1 in Russia and globally) and to emails (5-to-3 in Russia and globally). In many other emerging markets however, instant messaging garners a stronger preference.

Working hours spent in different locations



Though most employees feel they do their best work in the office, more people in Russia than anywhere else say they do their best work at home.

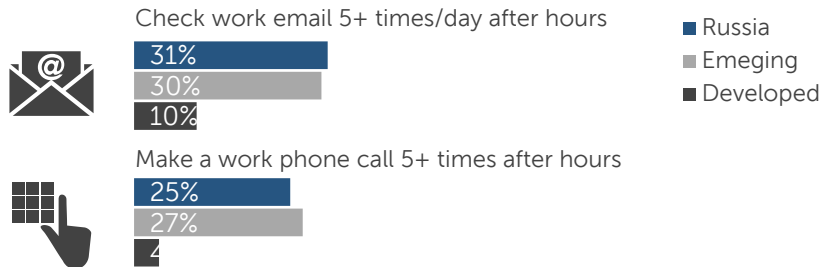
Do best work from home



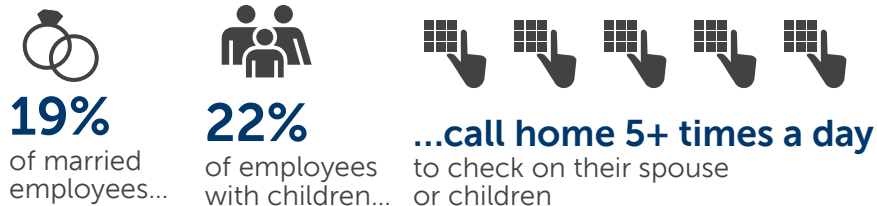
Work Life + Personal Life = Life



Evidently, Russian employees stay connected to work, even after business hours. And those who don't necessarily work from home during regular business hours frequently take calls or check email during their personal time.



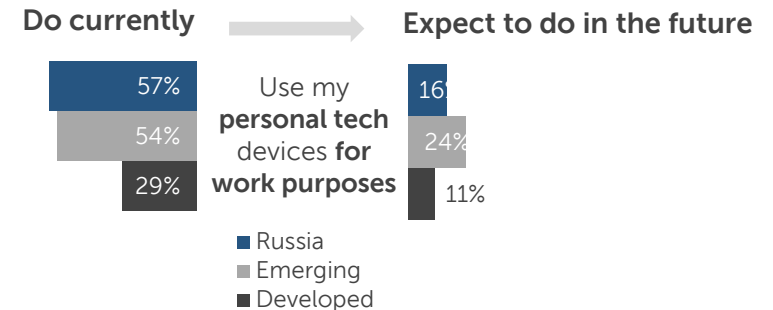
Given that work often overlaps with personal life, it's no surprise that Russians also frequently check in at home during business hours.



Likely due to the prevalence of desktops in the office, most Russian employees are unwilling to take work technology home and very few currently do or expect to in the future. However, many are using their personal technology for work purposes.

Currently do or expect to do in future:

	Russia	Emerging	Developed
Take my work tech home...			
...to work remotely	41%	72%	33%
...to use for personal purposes	25%	58%	26%



The majority of workers (3-in-4) have BYOD allowances from their employers to use personal devices for work, but report that only 23% are secured by their company's IT department. Also, about two thirds of all employees use personal devices without their company's knowledge. Secret use could pose security threats from intentional or unintentional breaches.

The Productivity Debate: Office Workers vs. Remote Workers



Likely driven by perception of higher productivity, as well as preference for personal communications, the Russian workforce sees value in having a company office—70% believe the central office will continue to exist at least in their lifetime (vs. 61% emerging market average).

For most employees, working from home is more of a bonus than an expectation. Working in the office is still expected by employers in this country, though this may be beginning to shift.



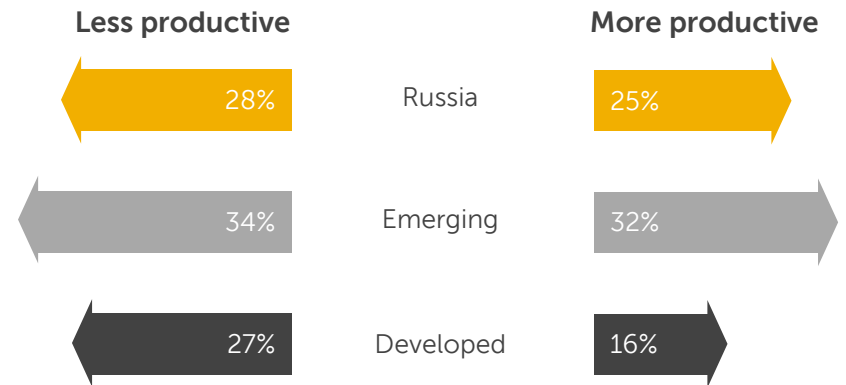
Three-fourths

view it as an **extra benefit** (vs. 7-in-ten globally)



Russians are undecided on the remote worker vs. office worker debate, with the majority feeling that home workers are just as productive as office workers (38% vs 28% emerging market average).

Overall, Russian employees believe people working at home are...



The Secret to Happy Employees? Technology



Having the latest and greatest technology for work is quite important to just over two-thirds of Russian workers (comparable to the global workforce, but lower than most other emerging markets). In addition, more than 9-in-10 feel that technology has had an influence on the way they work.

Technology doesn't have a great influence on worker retention—only 15% would leave their job if the technology is not up to par (a proportion lower than all other emerging markets), however, 74% say that the quality of the available technology would have at least some influence on their decision to accept a new position.

Despite the fact that employees only have a moderate influence on IT decision makers, most are very anxious to implement new technology right away.

53%

believe **IT decision makers in their organization take employee opinions into consideration** when selecting technology

63% Emerging
29% Developed

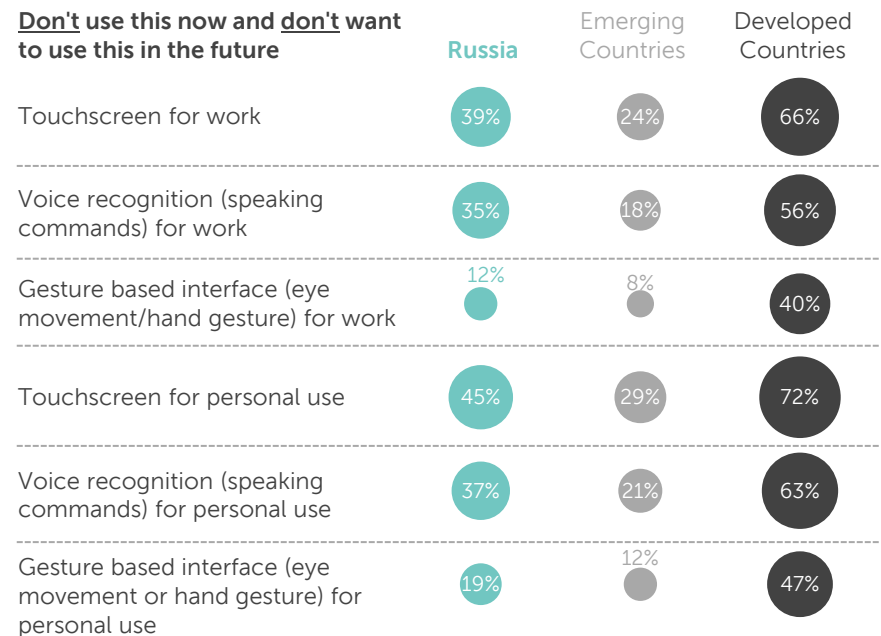
86%

are willing to **implement new hardware or software provided** by IT into daily work

78% Emerging
56% Developed

But even so, some are reluctant to use newer technologies for work.

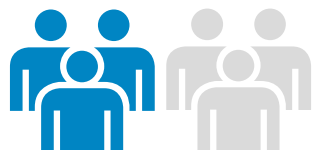
Don't use this now and don't want to use this in the future



The Future of Tech in the Workplace is Bright, but Not Fully Automated



There are still some divergent views on the role technology plays in bringing people together (31%) or separating them (25%)



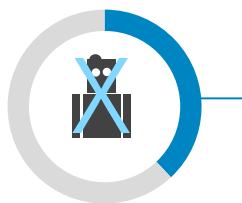
One half

Russian employees think technology is fine but that **there are some things that are just better done by people.**

Similar to other emerging markets

Half of Russian employees also believe that technology will hit a limit on the ability to improve productivity (a much lower proportion than other emerging markets).

In addition, advancements in technology won't replace the need for humans in the workplace—only one-third think their jobs *will be* fully automated in their lifetimes.



38%

believe their **job will NEVER be fully automated**

24% Emerging

54% Developed

Russians are further conflicted in that they agree most problems can be solved with technology, and that technology is the key to improving life as we know it, however they also agree that technology is advancing faster than we can keep up with it.

Attitudes about technology in the workplace

Most problems can be solved with technology



Technology brings people together



Technology is advancing faster than we can keep up with it



Development of new technology is key to improving life as we know it



■ Russia
■ Emerging
■ Developed





Turkey

Employees in Turkey are drawn to the latest technology in the workplace yet are limited by traditional work environments and employer-provided devices.

Most Turkish employees still work in a traditional office layout, still use desktops despite their preference for laptops, and say they are more productive when working from an office. Even though many spend some time working from home, it is generally perceived as a benefit rather than expectation. And it is potentially a risk to career development as many still feel that those working from less productive than office workers.

But in the face of their challenges, Turkish employees are generally forward thinking about technology and have a clear point of view about the importance of technology in the workplace despite some lingering concerns about where it is headed and their ability to keep up with it. They are driven by having the latest technology both in their professional and personal lives and will go to great lengths to get it.



One Size Doesn't Fit All



Most employees use a desktop computer for work in Turkey, but show much lower usage of the desktop for personal purposes. About half as many desktop users identify it as their most preferred work device, while the laptop is considered the favorite by nearly as many.

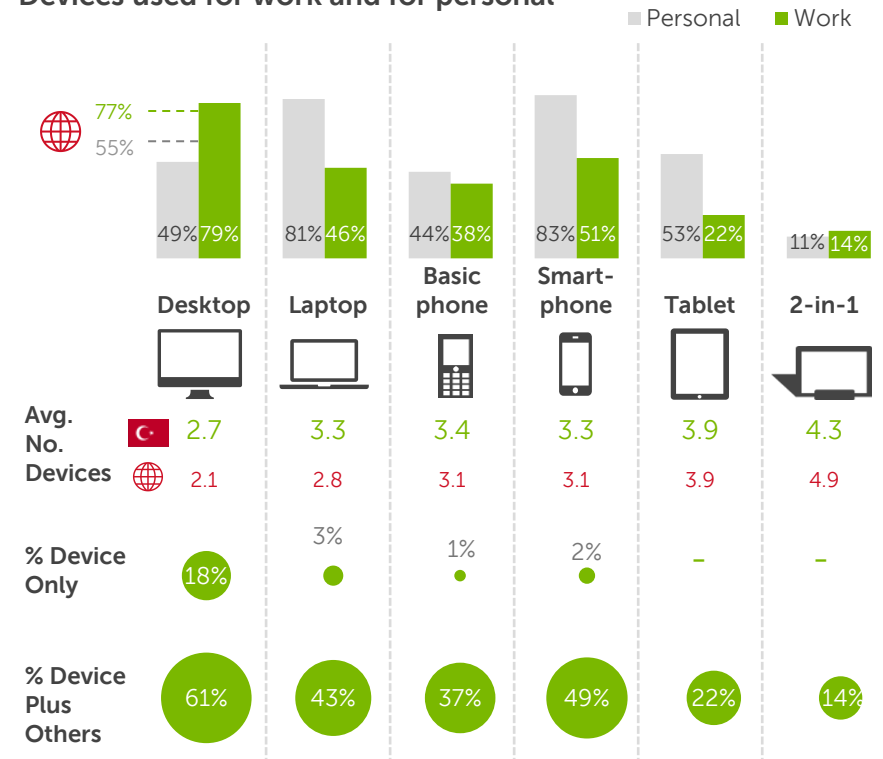
Smartphones are used for business purposes by just over half of employees, a higher proportion than most other emerging markets.

Tablets and 2-in-1s have relatively low overall work usage (22% and 14% respectively), but far exceed global usage of these devices (14% and 8%).

When considering a work device, performance is given the highest priority, followed by battery life and software compatibility at nearly equal levels.

While adoption of more mobile devices may not yet be commonplace in Turkish organizations, there is clear movement by employees to take advantage of more mobile and versatile options in their personal lives. When it comes to personal purposes, laptops (81%) are used more often than desktops (49%), as are smartphones (83%) and tablets (53%).

Devices used for work and for personal



The Office is King, but it's a Jungle Too



The Turkish workplace is very traditional with 98% of employees spending at least some time there each week and four-in-ten spending at least 75% of their time there. Employees in Turkey spend about 65% of their working hours in the office, about 20% of their working hours at home and a few hours each week at external offices or public places.

The office is the most conducive to getting the best work out of employees with 65% of workers saying that as compared to only 15% who say they do their best work at home. Turkey has a higher proportion of traditional offices (47%) than nearly all other emerging markets and fewer fully open floor plans (21%).

Communication channel preference varies among the workforce between personal and less personal methods. Though in-person meetings win out over online meetings (5-to-2 in Turkey vs. 3-to-1 globally), phone calls and instant messaging are preferred at near equal levels, as are phone calls to email. Additionally, 62% of employees admitting to frequently emailing or IMing with other people located near them.

While mobile email is used as frequently among young and middle-aged employees, younger staff more frequently access email from personal devices, requiring them to invest in the technology they need to be accessible to work. The older staff tend to be able to use company provided devices.

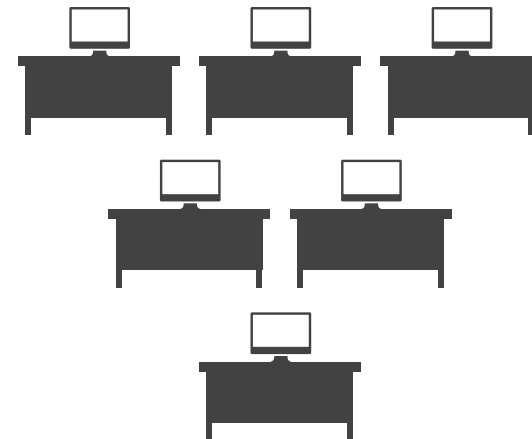
Working hours spent in traditional office layout

Turkish employees spend...

47%

in **traditional (offices and cubicles) floor plans**

37% Emerging
40% Developed



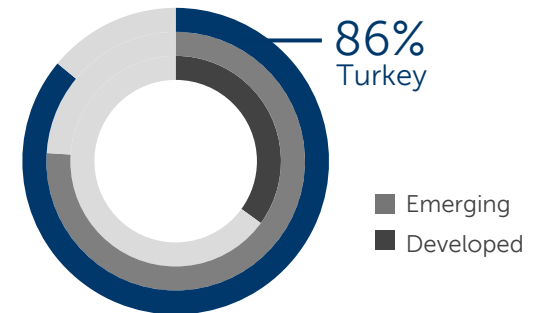
Work Life + Personal Life = Life



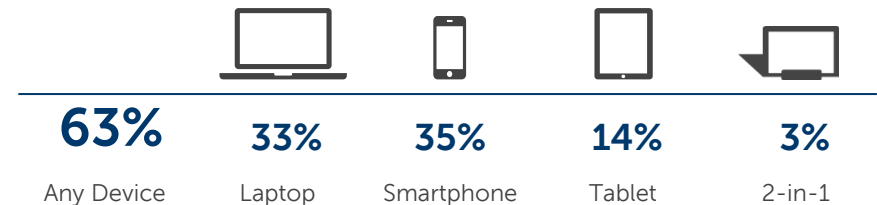
Turkish workers have a greater ability to bring their own device than any other country studied and take advantage of that offer with 81% of people using personal devices for work. However, about two-thirds of all employees use personal devices for work without their company's knowledge. The most frequent secret use is with more mobile devices such as laptops and smartphones. There is a clear disconnect as there is seemingly little reason that employees would feel the need to secretly use devices that may put confidential company information in jeopardy.

While two-thirds of Turkish employees say they spend some of their working hours from home, more than that take work calls (85% Turkey vs. 52% globally/81% emerging) or check email (87% Turkey vs. 62% globally/83% emerging markets) after hours. All the work put in after hours may be the reason that 97% of employees use technology for personal purposes while at work (which is acceptable to employers).

BYOD allowed to be used for business purposes



Using personal devices without company knowledge



The Productivity Debate: Office Workers vs. Remote Workers



Turkish employees show their dedication to hard work with over nine out of ten employees are working at home at least some of the time, higher than seen in both emerging and developed countries. Even still, opinions about working from home are more traditional and are divided in the Turkish workforce—43% feel that those working from home are *more* productive than those in the office, but 39% feel that those working from home are less productive. This is driven by generational differences where younger employees are more accepting of working from home, while older employees are resistant.

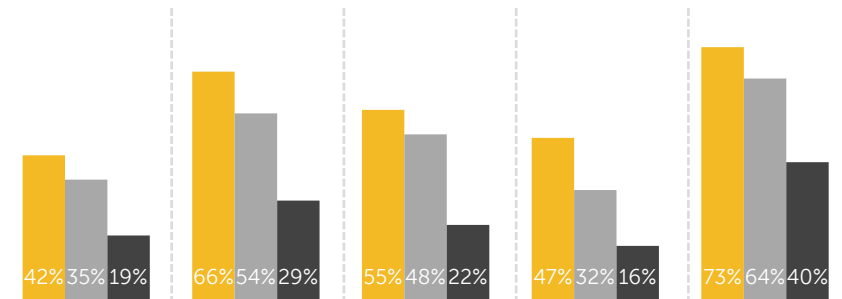
To facilitate this, just over half (66%) of Turkish employees are currently using personal technology devices for business purposes—this is slightly higher among non-managers than managers (66% vs 61%).

With such high working from home levels and use of personal devices to fulfill job requirements, it is not surprising that employers allow their staff to take care of personal tasks as needed. They generally do not restrict employees from using work technology for personal purposes while at work, and currently 97% of employees indicate that they do so.

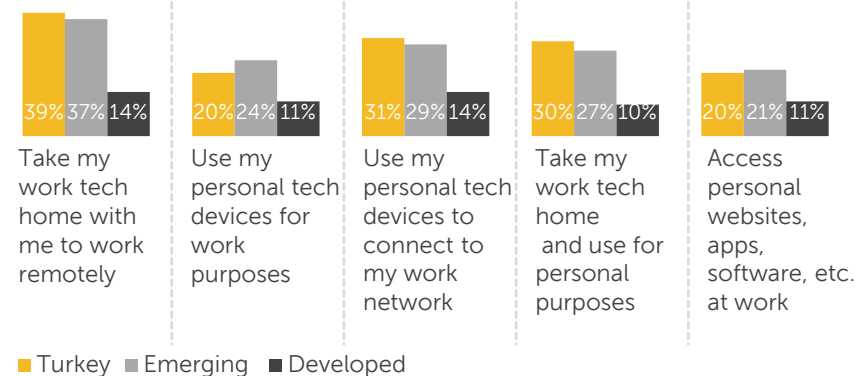
There will always be a role for the central office according to today's Turkish workforce, whereby 55% believe the central office will continue to exist at least in their lifetime (vs. 61% emerging market average).

For most employees, working from home is more of a bonus than an expectation. Three-fourths view it as an extra benefit.

Do currently



Expect to do in the future



The Secret to Happy Employees? Technology



Just over three-fourths of Turkish workers consider it important to have the latest technology and more than nine-in-ten feel that technology has had an influence on the way they work in the past year.

46% would leave their job if the technology didn't meet their standards (a proportion higher than most other emerging markets), and 87% say that the quality of the available technology would have at least some influence on their decision to accept a new position (47% say available technology would have a *lot* of influence on taking a new position).

Despite being constantly connected to work as we see from virtually all Turkish employees, they generally consider mobile technology helpful as opposed to a hindrance. While a small group, twice as many women feel that mobile technology requires them to be connected to or accessible to work after business hours which distracts them from being involved with family (11% vs 5% of men). But overall employees believe mobile technology enables them to manage their work/life balance.

Employees in Turkey say...

They would likely quit job if the technology didn't meet with standards



The technology available would influence decision to take a new position



Mobile technology allows me to work from anywhere and be more involved with my family while not ignoring my work responsibilities



■ Turkey
■ Emerging
■ Developed

The Future of Tech in the Workplace is Bright, but Not Fully Automated

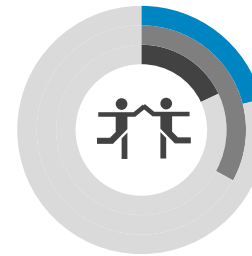


While it's clear that technology plays an important role in the Turkish workplace, there are still disparate attitudes about technology among the workforce. 32% agree technology separates people (vs. 16% emerging market average) while only 21% feel technology brings people together (vs. 33% emerging market average).

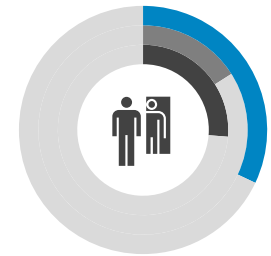
Over four-in-ten Turkish workers feel that technology is advancing faster than we can keep up with it, but nearly as many feel that having the newest technology is important.

Additional concerns come with technology advancements, including the risk that technology will replace the need for humans in the workplace—nearly two-thirds think their jobs will be fully automated in their lifetimes (vs. 50% emerging market average).

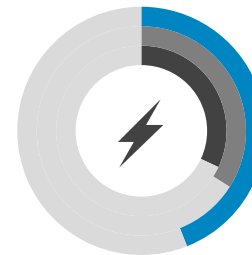
Technology brings people together



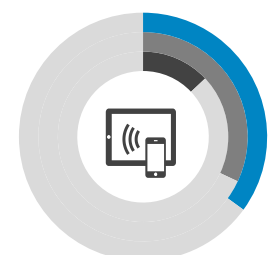
Technology separates people



Technology is advancing faster than we can keep up with it



Important to always have the newest technology



- Turkey
- Emerging
- Developed



UAE

Employees in the United Arab Emirates are moving to more modern working conditions, but having some lingering workplace traditions that may be holding some employees back.

Most UAE employees still use desktops, yet many, who work in multiple locations in and outside of the office, would prefer to use laptops. Office environments are shifting to more open floor plans, which are conducive to productivity, but some are feeling inhibited by the technology they have available to do their jobs. Perceptions by the majority remain that at home workers are less productive, yet many employees are now working from home, during and after business hours.

As employees look to being more mobile, working from many locations and working at all hours, the provision of quality technology by employers has to be an increasing priority.



One Size Doesn't Fit All



The desktop is the top device for getting work done in the office in the United Arab Emirates as it is globally with just over three-fourths of employees currently using it for work. Only about half as many who use it identify it as their most preferred device. Most employees, 76%, would actually prefer to use the laptop.

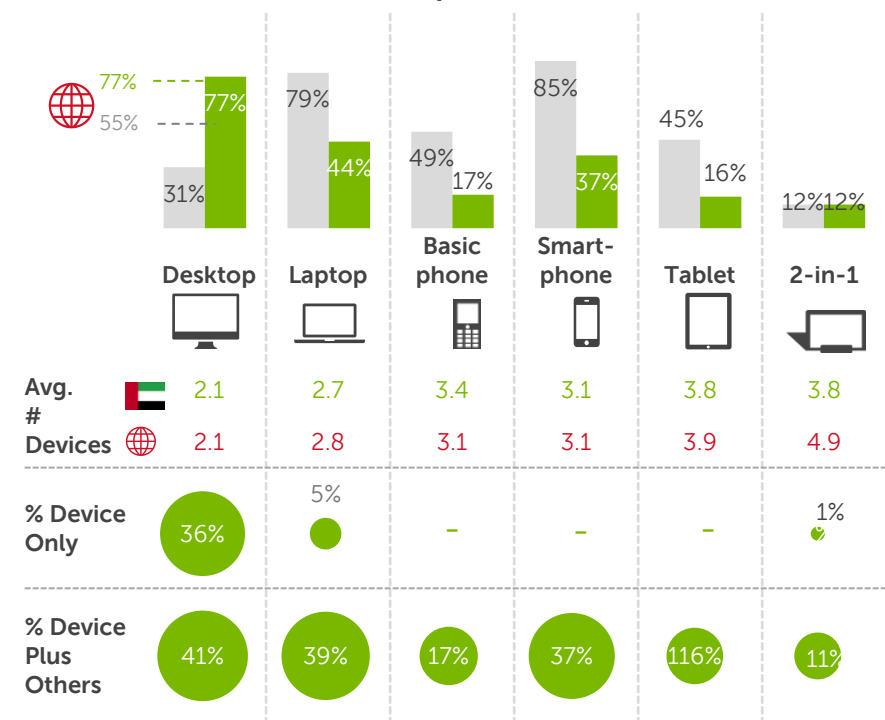
Becoming more mobile is appealing to those in UAE. The laptop holds the greatest appeal, and workers and employers have not yet adopted other available devices for business purposes, such as tablets and 2-in-1s. However, there is clear evidence of employees using multiple devices, not just one, to complete their work responsibilities.

When thinking about their work device, employees are most looking for performance. It is the number one consideration and could be a perceived deterrent for using an alternative device, such as a tablet, for work. Battery life also holds importance to UAE employees as it is a necessity for mobile devices.

Also shaping employee perceptions of which work device they would like to use are their personal habits. Workers tend to use laptops more often than desktops (79% vs. 31%) in their personal lives and also show high personal smartphones usage (85% vs. 35% for work use).

As people are shifting to more tablets use in their personal lives, currently at 45%, and using touch interface for work becoming more of a priority, tablet adoption in the United Arab Emirates workplace may be growing in the future.

Devices used for work and for personal



The Office is King, but it's a Jungle Too



Most work in the UAE is being done in the office of an employer, and nearly all employees spend at least some time there. Although this is seemingly very traditional, it is not, with only one-third spending at least 75% of their time there as compared to more than half of employees globally.

Employees in the UAE spend 58% of their working hours in the office, 18% at home, 15% at external locations, such as a client's office, and 9% in public places, making the workplace for the UAE employee virtually anywhere.

With this movement to working in a variety of locations, employees still admit that it's also the most conducive to their effectiveness. 72% of workers say they do their best work in the office (compared to only 12% who say they do their best work at home).

The office environment itself is also changing away from the traditional. The majority of employees in the UAE have office layouts that are a mix of some offices and some open space, and they have far fewer traditional offices and cubicles than in other countries globally. Those who are in the more modern, open floor plans indicate at slightly higher levels that their office layout increases their productivity and effectiveness.

Personal interactions are generally preferred over more impersonal, technology-driven options.

In-person meetings win out over online meetings (5-to-2 in the UAE vs. 3-to-1 globally) and phone calls are preferred to instant messaging (5-to-2 in the UAE vs. 2-to-1 globally). In many other emerging markets, remote options such as instant messaging have greater preference. Despite the preference for personal communication methods, employees in the UAE do admit to frequently using email and IM with those physically located close to them (63%) albeit at lower levels than other emerging country counterparts.



Open plans

(26% open plans and 62% say it increases their productivity and effectiveness)



In-person meetings

are preferred to online meetings (5-to-2 in UAE vs. 3-to-1 globally)

Work Life + Personal Life = Life

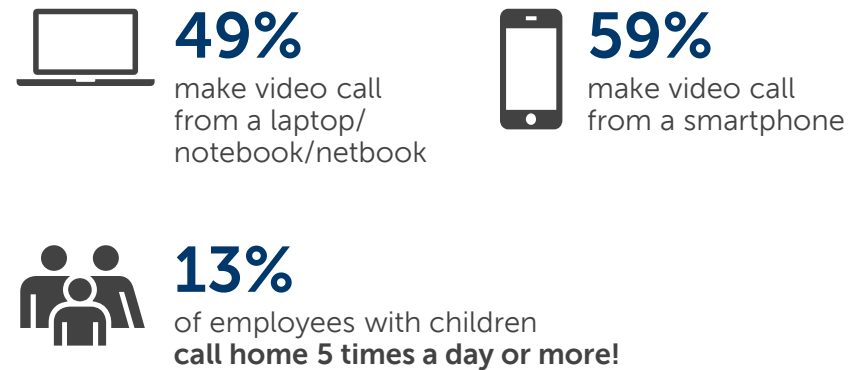
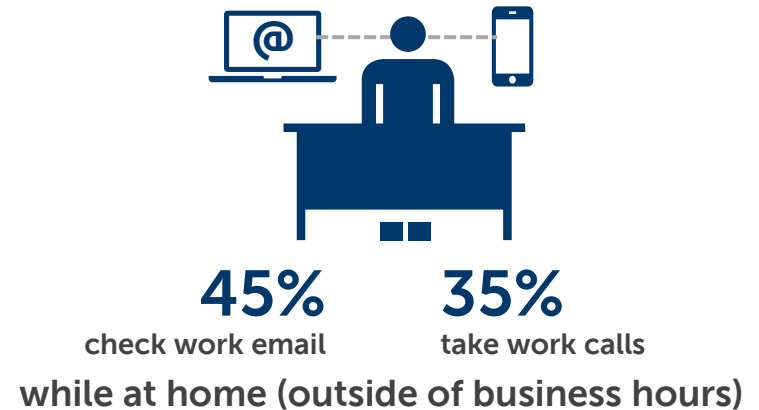


With two-thirds indicating they spend some of their working hours from home, many more, take calls for work or check their work email after hours. In fact, 45% of employees in the UAE check work email 5 or more times a day after working hours, and 35% take work calls 5 or more times a day after working hours, more than nearly all other emerging markets.

It is clear that workers in UAE have a great obligation to stay connected to their work during personal time, but they also have a great need to stay connected to their personal relationships while working.

All the work put in after hours may be why 94% of employees indicate they use technology for personal purposes while at work. Nearly one-third of employees indicate making video calls from their laptops and smartphones, either personal or employer provided devices, and almost as many video chat with spouses/significant others while traveling for business and use video to check in on their children while working.

With such a great need for personal and business connectivity, nearly three-fourths of employers are authorizing the use personal devices for work. Almost everyone, 86%, with permission for BYOD take advantage of it. Undeterred by policy, about half of use personal devices without their company's knowledge. By secretly using personal devices, these employees are unwittingly putting their companies at risk of security breaches and this tactic is seemingly unwarranted with such broad allowance of BYOD by companies in the United Arab Emirates.



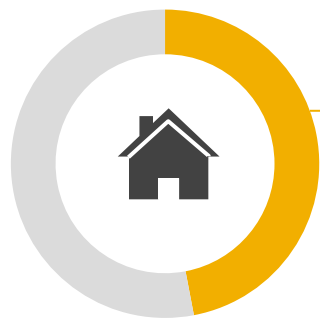
The Productivity Debate: Office Workers vs. Remote Workers



Another facet of employee life in UAE that is still very traditional is that almost half of employees think that those working from home are less productive than those in the office. It is somewhat unexpected that this mindset has not vastly deviated from the traditional given that we now see many more people working at home. However, this perception may be shifting in the future as some, 27%, believe home workers are more productive than those in offices.

Clearly for UAE employees, there is still value in having a company office to go to for work and for personally engaging with other employees and management. There is no expectation of shifting to fully remote workforces in the near future as 60% believe the central office will continue to exist at least in their lifetime.

Perceived productivity of people working from home



47%

Employees who think people working at home are **less productive** than those in offices

Working from home is very much perceived as a benefit to employees and is not an expectation for employers to offer it. With the perception held by the majority that home workers are less productive, this should be no surprise.

8-in-10

view it as an **extra benefit**



The Secret to Happy Employees? Technology



Having the latest and greatest technology for work is extremely or very important to the majority of employees in the UAE. The technology provided by employers has a lot influence on 44% of the workforce for taking a new position and may contribute to another 43% leaving their current job.

While more than nine-in-ten employees feel that technology has had an influence on the way they work in the past year, nearly a third indicate the work technology they have available holds them back or keeps them from being productive. Additionally, one-in-five believe that technology has hindered their career growth.



Important to have the latest and greatest technology at work



Available technology at work prevents productivity



Technology has hindered my career growth



- UAE
- Emerging
- Developed

The Future of Tech in the Workplace is Bright, but Not Fully Automated



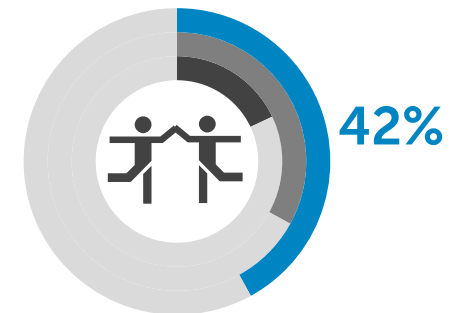
It is evident in the UAE that employees believe that technology will continue the trend toward mobile. Despite low current work use of tablets, two-thirds expect tablets to completely replace laptop computers in their lifetime.

While there is generally optimism employees have about the future of technology in the workplace, there are some lingering concerns.

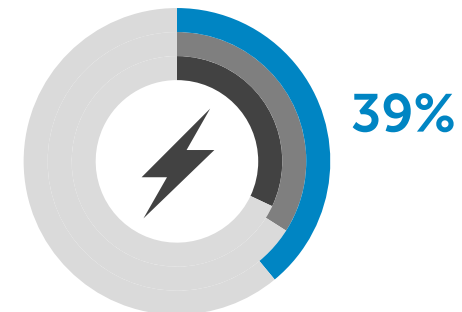
- Forty-two percent feel technology brings people together, but still 14% feel technology separates people.
- Another 42% feel that most problems can be solved with technology, but 39% perceive that technology is advancing faster than we can keep up with it.
- Furthermore, about half do not think that technology will hit a limit on the ability to improve productivity, but half also feel that their jobs will be fully automated in their lifetime.

Companies who don't invest in updated technology and don't demonstrate how this technology can benefit the employee not only risk a loss of productivity, they also put themselves at a disadvantage for attracting, motivating, and retaining the talent needed to promote growth now and in the future.

Technology brings people together



Technology is advancing faster than we can keep up with it



- UAE
- Emerging
- Developed



South Africa

Employees in South Africa are showing movement to more contemporary work lives, but many behaviors and perceptions are still based in tradition.

Most use desktops for work, say they are more productive when working from an office, and prefer to communicate with personal interaction. But advances in technology are leading to clear benefits by enabling employees to work from the office less often, increasing their productivity and enabling faster communication with others. However, South Africans are frequently interrupted while working at their desk, which may be a detriment to their overall productivity while at the office.

During their personal time, South Africans are nearly constantly connected to work yet feel that mobile technology is an enabler rather than a barrier to spending time with their families. They also feel less stress when working from home. But the perceptions of home-based workers has not yet fully shifted in South Africa whereby a third still think those who work from home are less productive than those working in the office.

With all of the benefits South Africans experience from the advancement of technology, there are still some concerns. South African employees are more likely than employees in nearly all other countries to agree that technology is advancing faster than we can keep up with it. And about half of South African employees agree that that technology will hit a limit on the ability to improve productivity.



One Size Doesn't Fit All



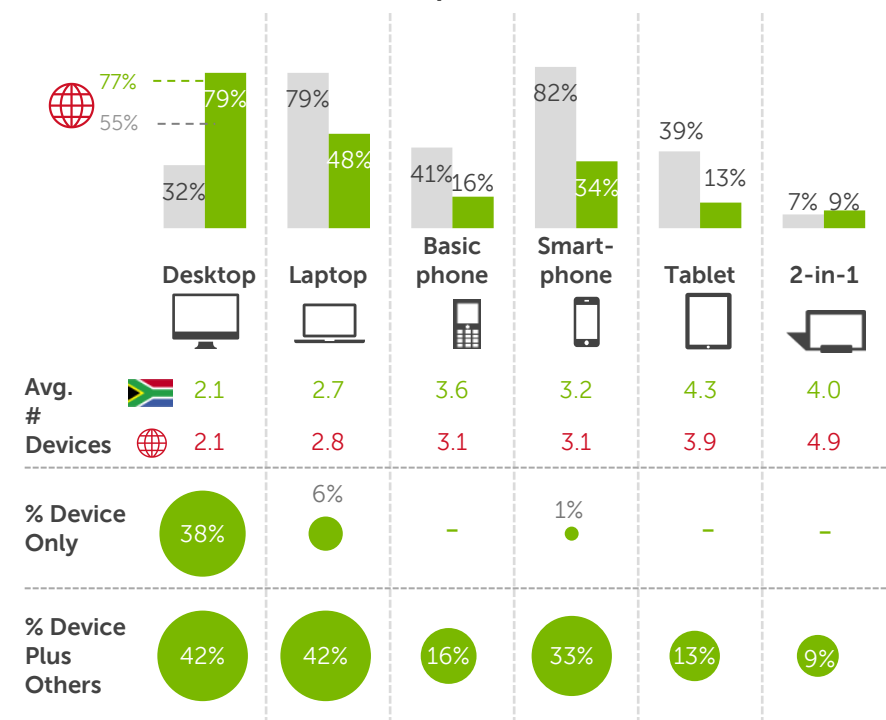
The desktop is still number one for getting work done in the office in South Africa. Eight-in-ten employees use it for work, however, only about half as many identify it as their most preferred. Laptops are preferred equally to desktops, though a much lower proportion of employees use them for work. Even though desktops and laptops dominate for work, it is apparent that workers in South Africa are also using other devices in conjunction with their desktop or laptop, most notably is the smartphone.

Tablets are gaining momentum in South Africa with relatively low current usage, but clear desire by nearly a third of employees who would prefer to use the tablet for work. 2-in-1s are used rarely for business purposes in South Africa, even below the usage levels of other emerging markets.

While performance is the most important attribute people look for in a work device globally, it is the same for South Africa. Performance is followed by software compatibility, which is typically rated lower than battery life in other emerging markets.

Despite high usage of desktops for work purposes, when it comes to personal purposes, laptops (79%) are used more often than desktops (32%), as are smartphones (82%) and tablets (39%) indicating a shift in desire toward more mobile computing form factors for personal purposes that are beginning to spill over into work preferences.

Devices used for work and for personal



29%

would prefer to
use tablets for work
Compared to:
16% Emerging
14% Developed

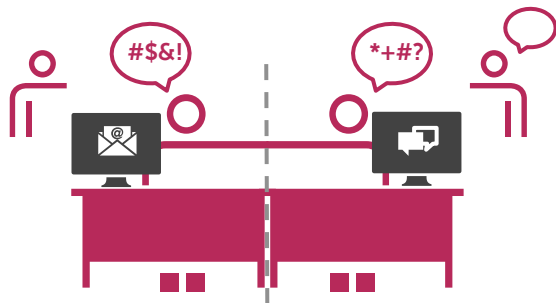


The Office is King, but it's a Jungle Too



Ninety-nine percent of all employees in South Africa spend at least some of their working time in their employer's office. Just over half, 56%, spend at least three-fourths of their time there (which is higher than most other emerging markets, 43%).

With such high office attendance, most South African workers (68%) say they do their best work in the office (compared to only 16% who say they do their best work at home). However, South Africans agree that they are frequently interrupted while working at their desk, which may be some of the reason not everyone does their best work in the office. **South Africans report more interruptions than all other emerging markets** despite the fact that their office layouts are similar.

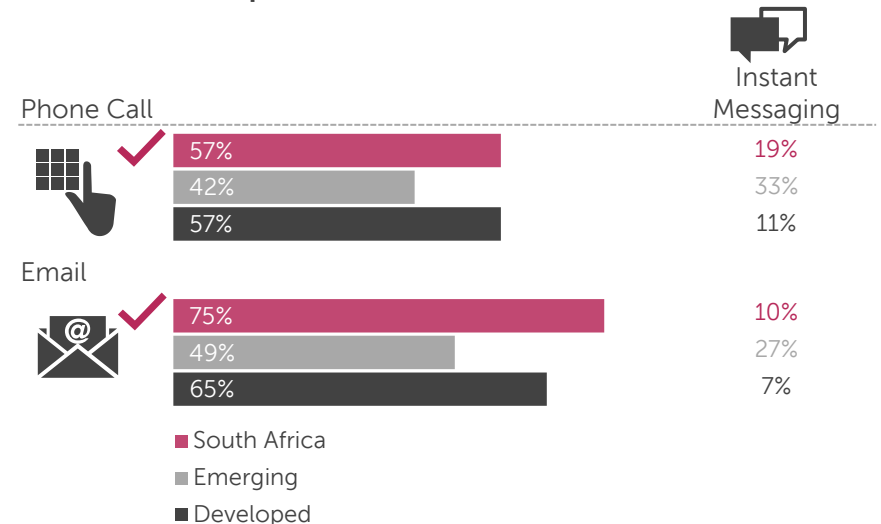


62%
are frequently interrupted
while working at desk
Compared to:
45% Emerging
50% Developed

71%
use email or IM to communicate
with other people located nearby
Compared to:
67% Emerging
37% Developed

Communication methods that are more personal are generally preferred over other options, with exception of email. In-person meetings win out over online meetings (6-to-1 in South Africa vs. 3-to-1 globally) and phone calls are preferred to instant messaging (6-to-2 in South Africa vs. 2-to-1 globally), Email is preferred to both phone and instant messaging, but the preference is more pronounced versus IM. In many other emerging markets, instant messaging shows higher preference.

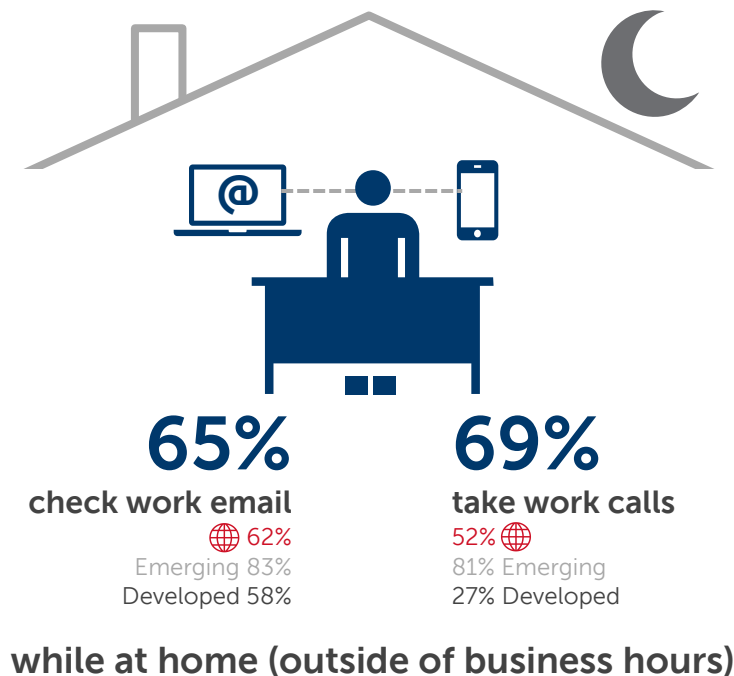
Communication preference



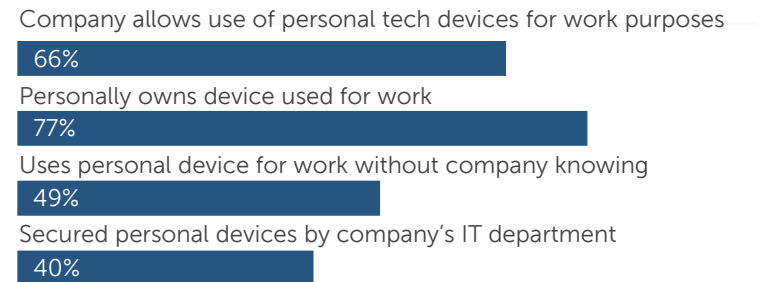
Work Life + Personal Life = Life



Just over half of South African employees say they spend some of their working hours from home. But, about two-thirds of employees indicate they take work calls or check work email after hours showing a clear intrusion from work on their personal time.



Two-thirds of workers are authorized by their employers to use personal devices for work (a lower proportion than other emerging markets). Many are using personal devices for work, but only half of those have been secured by their company's IT department. About half of those that aren't authorized, use personal devices without their company's knowledge (again, a lower proportion than most other emerging markets).



Many South African employees feel the benefits of using mobile technology, whether personal or employer-provided, for managing work/life balance. 30% strongly believe that having mobile technology that allows them to work from anywhere gives them the freedom to leave work and be more involved with their family while not ignoring their work responsibilities as compared to 24% in emerging markets and 7% in developed countries.

The Productivity Debate: Office Workers vs. Remote Workers



South Africans are nearly evenly split into thirds between believing those who work from home are more, less, or just as productive as those in the office despite 56% spending one hour or more from home and 16% indicating they do their best work from home,

Regardless of the benefits of working remotely, working in the office seems to still be expected in this country given the high numbers of employees spending at least some time in the office. Further supporting this, the South African workforce believes there will always be a role for the central office.



South Africans, more so than other emerging market counterparts, see working from home as a benefit rather than an expectation that employers may provide to their staff.

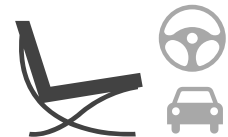


But those who do get to spend any time working from home are reaping some personal rewards.



60%

Feel less stressed
49% Emerging



43%

Drive less
39% Emerging

At least some of this relief may be due to avoiding the commute into the office.

The Secret to Happy Employees? Technology



Most South Africans feel that technology has had an influence in the way they work in the past year. Employees state working from the office less often, increased productivity and faster communication as key areas in which current technology has had some impact.

Influence of technology on work



70%

are more productive

66% Emerging



61%

Communicate faster with co-workers

64% Emerging



57%

Communicate faster with others
(customers, partners, vendors, etc.)

53% Emerging



25%

Work from the office less often

17% Emerging

There is a high priority placed on having the latest technology at work as just under three-fourths of South African workers consider it important (vs. two-thirds of the global workforce/two-fifths of developed markets).

Be that as it may, only 26% would leave their job if the technology does not meet their standards, and yet, 78% say that the quality of the available technology would have at least some influence on their decision to accept a new position. Technology may not be fundamental for retaining existing staff in South Africa, but should be considered by employers when trying to attract new talent.

The Future of Tech in the Workplace is Bright, but Not Fully Automated



South Africans have a positive attitude toward technology and the improvements associated with new advances. They generally believe technology brings people together rather than separating them, and that technology is the key to improving life as we know it.

With the future comes increased mobility and enhanced software as nearly half employees believe that tablets will completely replace laptop computers and auto-correct technology will be standard in productivity software before they retire.

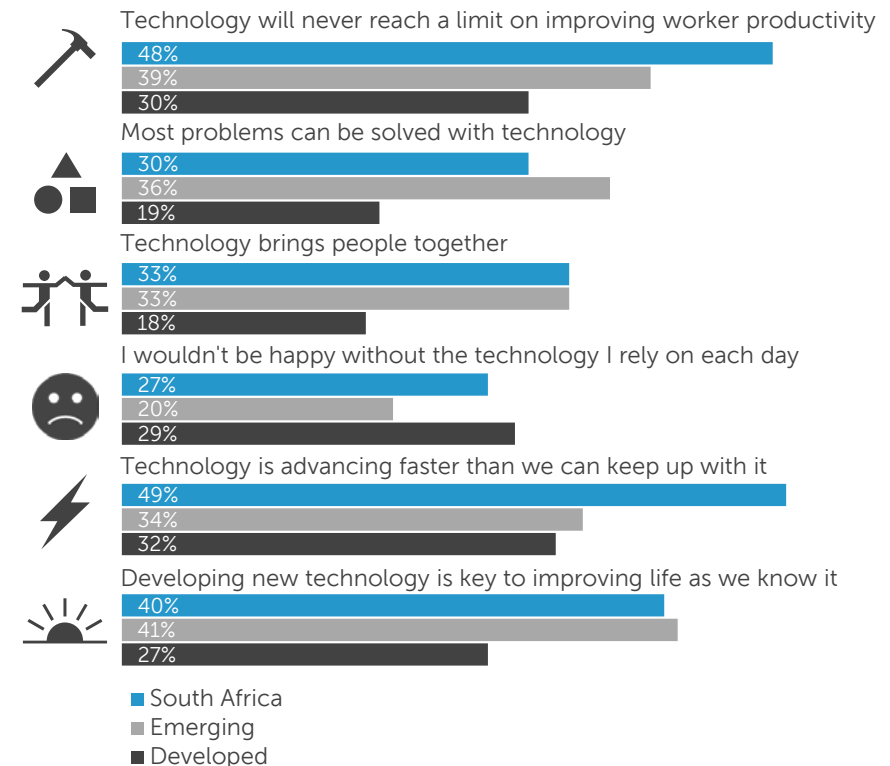


Nearly

Half

Believe tablets **will completely replace laptop computers** before they retire

About half of South African employees agree that technology won't ever reach a limit on the ability to improve productivity, but similar numbers of South African employees are more likely than employees in nearly all other countries to agree that technology is advancing faster than we can keep up with it.





Brazil

The workplace is changing—but in Brazil, some traditional practices still hold fast. Working in the office is an expectation, and face time with management is still important. However, mobile technologies and alternative interfaces are playing an increasing role, so Brazilian workers are caught somewhere between “new workplace” and “traditional workplace”. And much of it is driven by what workers want, and what employers are willing to allow.

Most Brazilian workers still use desktops and say they are more productive when working from an office; very few work from home (compared to other emerging markets).

However, Brazilian workers’ don’t necessarily agree that the current situation is optimal. They tend to prefer laptops over desktops, and take work technology home with them, or use personal devices in order to work remotely (or expect to in the future). The majority feels that employees working from home are just as productive or more so than those in the office and many expect employers to offer the option to work from home.

Empowering Brazilian employees with work-provided mobile technologies or allowing them to use their existing mobile devices can provide them with ability to work wherever and whenever. This is especially important in Brazil as many Brazilians agree that mobile technology gives them the freedom to be more involved with their families without jeopardizing work responsibilities.



One Size Doesn't Fit All



In Brazil, there is a discrepancy between what technology employers choose to provide and what workers prefer to use: employees in Brazil still use desktops heavily (8-in-10 use them for work), but only half as many prefer them. Workers are more interested in using laptops, but few, 12%, are offered them by their employers as their primary work device.

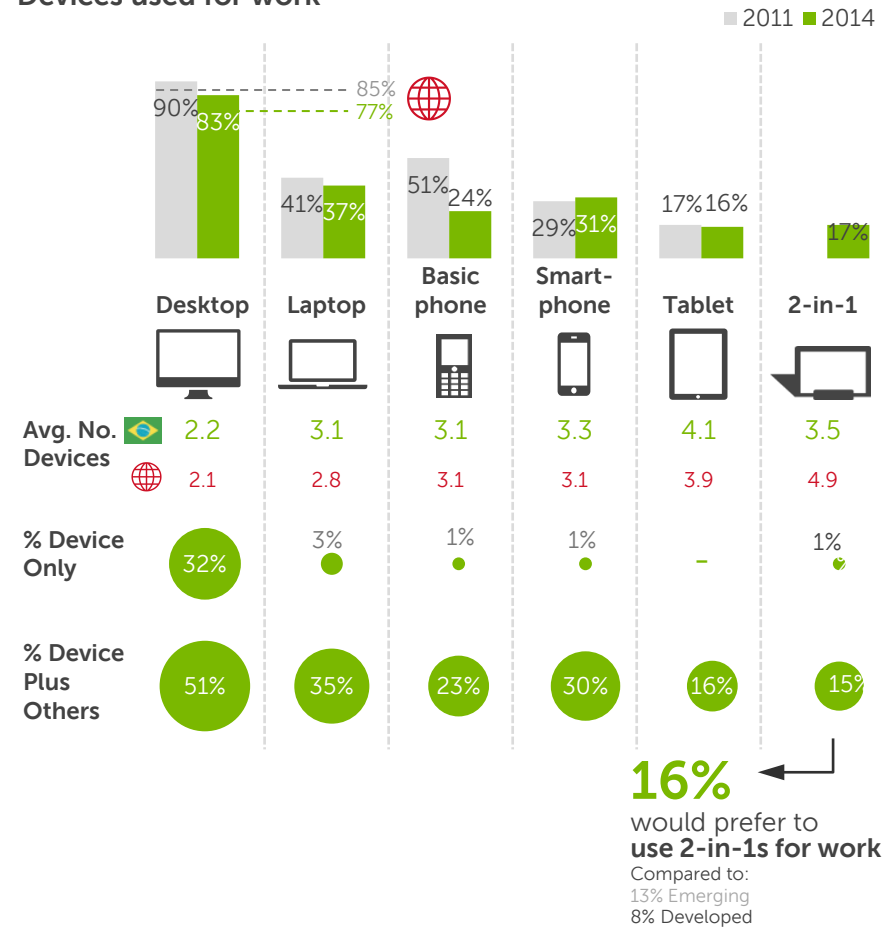
And though the use of tablets and 2-in-1s is low, Brazilian workers are beginning to perk up to these types of devices, as 16% indicate 2-in-1s would be their preferred device. Despite low usage of these form factors, the use of touchscreens for work is somewhat more prevalent in Brazil than in developed countries, but lower when compared to other emerging markets. Still, the strong desire to use them in the future may be predictive of what's next.



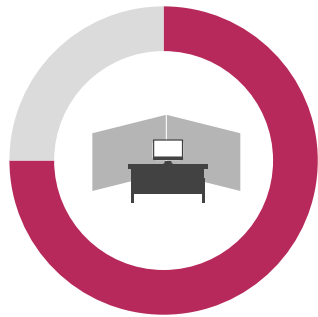
What's most important to Brazilian workers in terms of their work device? Performance. Next is battery life (which differs from developed countries, where software compatibility is more important than battery life).

When it comes to personal purposes, laptops (79%) are used more often than desktops (55%), as are smartphones (82%).

Devices used for work*



The Office is King, but it's a Jungle Too



Half
of Brazilian employees
spend at least
75%
of their working hours
in their employer's office

The amount of time Brazilian workers spend in the office is higher than other workers in emerging markets, and almost everyone spends at least some time there regularly.

56% of workers **say they do their best work in the office**, however, this attitude is less prevalent than in other emerging markets, possibly due to the frequency with which Brazilian workers report they are interrupted at the office.

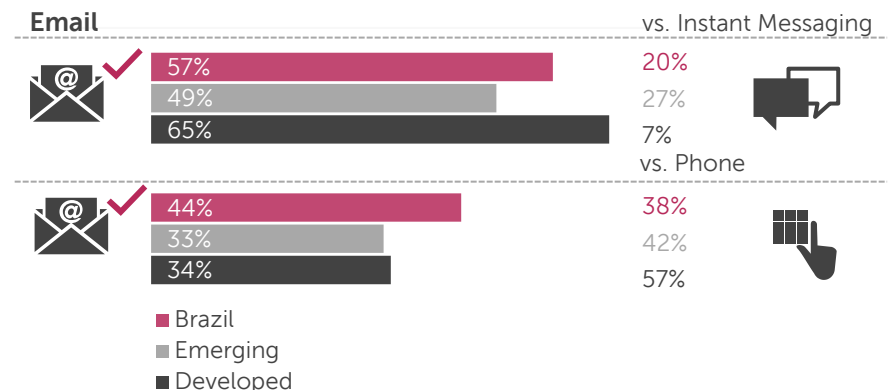


57%
are frequently interrupted
while working at desk
45% Emerging
50% Developed

With the trend toward more open floor plans, one would expect that workers would face more frequent interruptions, yet almost half of them believe that the open floor plan *increases* their productivity and effectiveness. Notably, 20% say that they do their best work when they are in a shared work space within the office, such as a conference room.

31%    **49%**
Currently have **who do say it increases**
open floor plan **productivity/effectiveness**

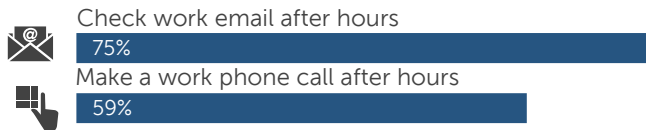
Brazilian workers generally seem to value the personal interactions that come along with workplace communications, and they prefer in-person meetings over online ones. On the other hand, preference for email wins out over both phone calls and instant messaging.



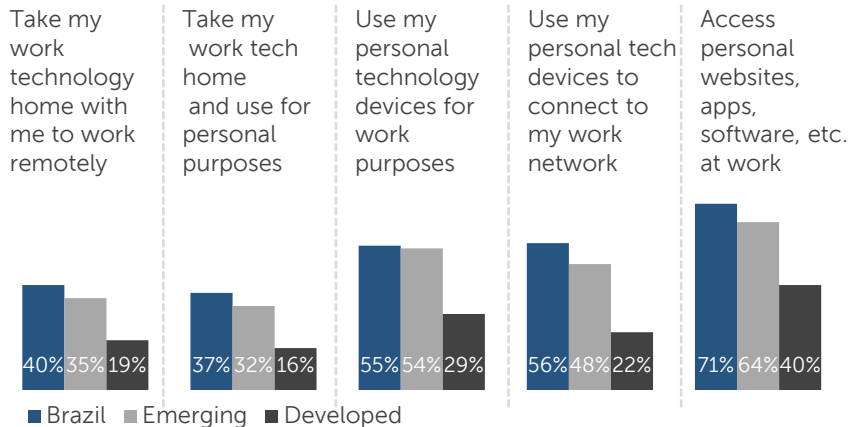
Work Life + Personal Life = Life



It is fairly uncommon for Brazilians to work from home. In fact, only 56% work at least some of the time from home, compared to 68% in other emerging markets. Despite this tendency to be in the office during work hours, Brazilians are very connected to work during their personal time.



Brazilian workers also face a lot of cross-over between work and personal in the devices they use. Work technology is often taken home to work remotely and to use for personal purposes. Additionally, employees also use their personal technology for work and to connect to their work network.



With such high use of personal devices for work, it is fortunate that two-thirds of workers are authorized by their employers to use personal devices for work (but a somewhat lower rate than other emerging markets). However, some employees take matters into their own hands by doing it unauthorized: 42% of workers use personal devices for work without their employers' knowledge (vs. 61% of other emerging markets).

Brazilian workers are also less likely than workers in other emerging markets to say that personal devices are secured by their company's IT department (38% vs. 50%). These behaviors could pose significant risks to company security from both intentional and unintentional data breaches.



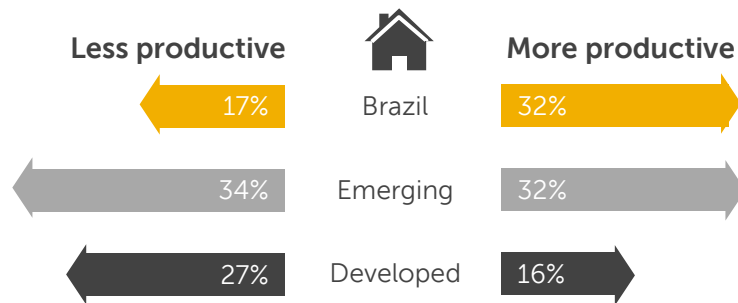
38%

Report that their **personal devices are not secured** by their company's IT

The Productivity Debate: Office Workers vs. Remote Workers



Brazilians have modern beliefs about the productivity of remote workers—compared to other workers around the globe, they are more likely to believe that remote workers are just as productive or more than those in the office.



But they also feel that there will always be a role for the central office, too.



63%

believe **the central office will continue to exist** at least in their lifetime

61% Emerging

Even though working from home is not considered commonplace, 17% indicate they do their best work there, even though....

87%

have **someone else in the home with them** when they are working



For Brazilian workers, working from home is just as likely to be considered a benefit as it is to be considered an expectation. In all other markets, workers tend to view home-working as a perk or extra benefit that isn't expected.

Four-in-ten

expect to be able to work from home

(three-in-ten in Emerging and two-in-ten in Developed countries)



The Secret to Happy Employees? Technology



Having the latest and greatest technology at work is of utmost importance to employees in Brazil.



91%

Brazil employees say
**it is very or extremely important
to have the latest technology**

82% Emerging
41% Developed

Just over 3-in-10 would leave their job if the technology wasn't up to standards, and 84% say that the quality of the available technology would have at least some influence on their decision to accept a new position.

Technology influences the way in which employees in Brazil work: 9-in-10 can identify at least one influence it has had over the past year.



65%

are more productive



59%

Communicate faster with co-workers

54%

Communicate faster with others outside company
(customers, partners, vendors, etc.)

Additionally, with Brazilians being accessible for work purposes so much after hours, they feel the benefits that mobile technology has provided them.



27%

**strongly feel that having mobile technology gives the
freedom to leave work and be more involved with
family** while not ignoring work responsibilities

24% Emerging
7% Developed

The Future of Tech in the Workplace is Bright, but Not Fully Automated

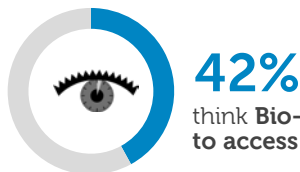


Employees believe that technology will continue the trend toward mobile.



Brazilians think tablet computers will eventually completely replace notebook computers
85% Emerging
88% Developed

Other technological advancements are expected to make employees' work lives easier. Forgot your key or access card? With bio-metrics, those concerns will be a thing of the past.

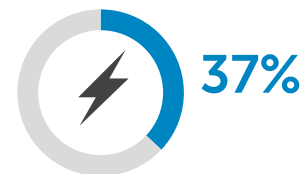
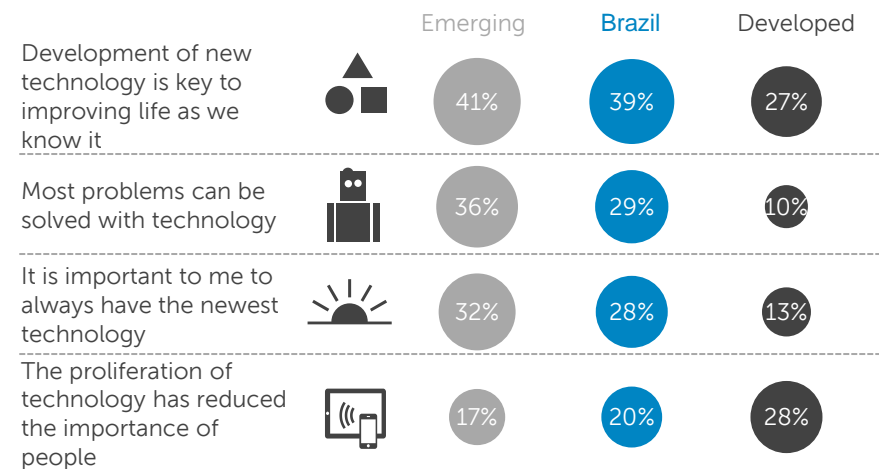


think **Bio-metrics** (like retina scans) **will be used to access offices** before they retire

In general, Brazilian workers are open to new technology: 30% feel technology brings people together, while 19% feel technology separates people.

Though technology is valued, Brazilians also value the role of humans in the workplace with over half (55%) of Brazilian employees agreeing that technology is fine, but some things are just better done by people (vs. 65% in developed countries).

In general, Brazilian workers are somewhere between emerging and developed markets in terms of their technology attitudes. Employees are clearly in the camp that technology benefits life and addresses problems (thus they aspire to have the newest technology), yet they also have various concerns.



Say **technology is advancing faster than we can keep up with it**



China

It is evident that the workplace in China is changing and becoming more modern, but some core behaviors and attitudes are based on long-standing tradition.

Employees are now working from virtually everywhere, yet everyone spends at least some time in their employer's office and most consider the office the most conducive to productivity. Workers show desire to have the ability to work from home, but still largely believe that remote workers are less productive. When it comes to the personal lives of employees, many use mobile devices, but desktops are still the most prevalent computing device for work (but may be used in conjunction with other devices).

Nevertheless, some elements in the workplace have advanced more quickly. Many Chinese employees use touchscreen technology for work (they have higher tablet usage than all other markets) and use personal devices in order to work remotely (or expect to in the future). Attitudes have also evolved to being more technologically-oriented where Chinese employees are more likely than employees in nearly all other countries to agree that most problems can be solved with technology and that development of new technology is the key to improving life as we know it.



One Size Doesn't Fit All



Work is done in China on the desktop with about nine-in-ten employees use it for work.



Half

prefer the desktop

55%

However, executives are far more likely to be using portable technology than other employees. They use laptops (78%), tablets (56%) and 2-in-1s (53%) more frequently than those in other roles.

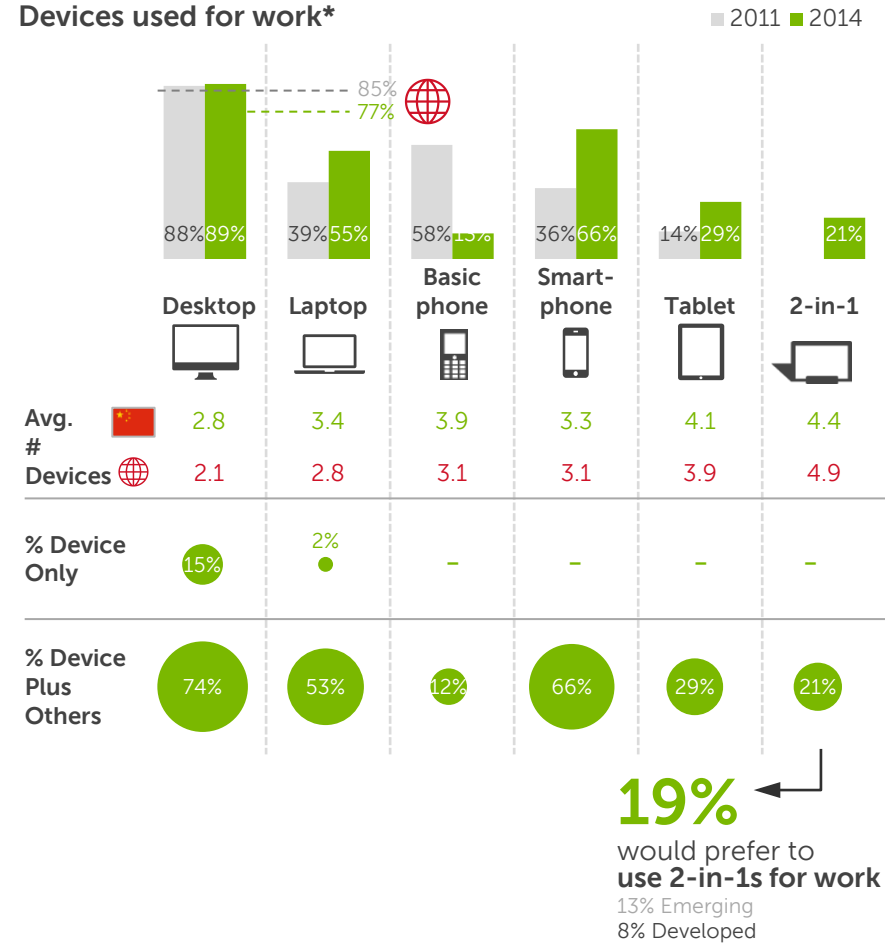
Touchscreen usage for work is high (51%), and more prevalent in China than in most other emerging markets.

Performance is the most important attribute people look for in a work device, followed by battery life (in developed countries, software compatibility is more important than battery life).

When it comes to personal purposes, laptops (77%) are used more often than desktops (61%), as are tablets (63%) and smartphones (93%).

Tablet usage in China is higher than all other markets, for both personal (63%) and work (29%) use, And there is a growing desire by employees to use 2-in-1s for work purposes.

Devices used for work*



The Office is King, but it's a Jungle Too



All employees spend at least some time per week at their employer's office, with just over half spending at least 75% of their time there (which is higher than most other emerging markets). It is good news for Chinese employers that 82% employees indicate the office is also the place where workers say they do their best work. While most Chinese workers spend some time working in other locations regularly, those places may not be as productive due to distractions, such as family members in the home or external noise in public places.

Chinese employees spend at least 1 hour/avg. per week at...

100%



their employer's office

71%



at external location (client)

66%



at home

87%

have someone else at home with them when they are working

53%

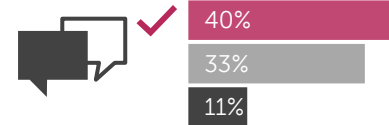


at public place

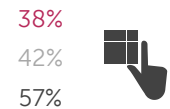
Employees in China tend to prefer more personal forms of communication, such as in-person meetings over online meetings; phone calls over email; however, the Chinese are big on instant messaging and prefer this form of communication slightly more than phone calls and considerably more than email. Instant messaging has been ranked as the number one tool in aiding productivity, higher than any other country.

Communication Preference

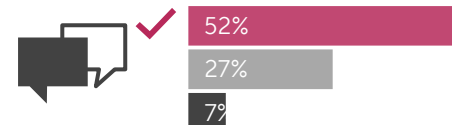
Instant Messaging



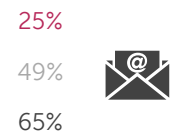
Phone



Instant Messaging



Email



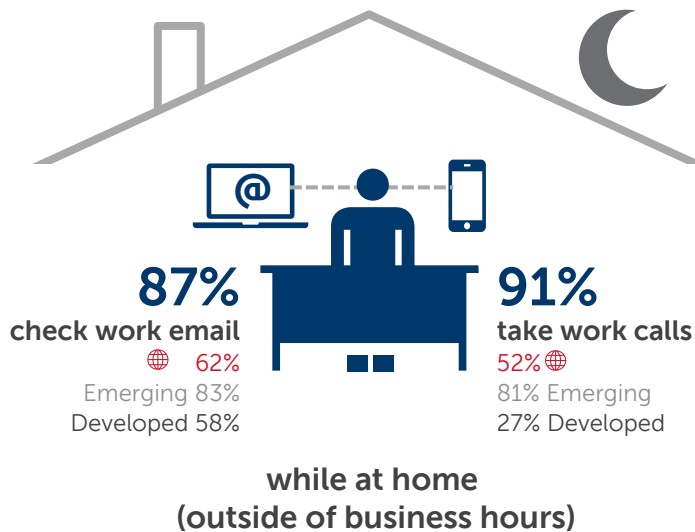
■ China
■ Emerging
■ Developed

Work Life + Personal Life = Life



While many Chinese employees spend some of their working hours from home, almost everyone takes work calls and checks work email from home after hours and at higher levels than most other emerging countries. To accomplish this, however, most are using their personal devices rather than employer-provided devices.

Given the intrusion of work during personal time, it's no surprise that the converse is also true, whereby 88% of Chinese employees use technology for personal purposes while at work.



Companies in China exhibit some of the highest rates of BYOD globally. While eight-in-ten workers are authorized by their employers to use personal devices for work, nearly just as many use personal devices without their company's knowledge. While this secret use poses potential security threats to Chinese businesses, China also shows the highest proportion of devices being secured by the company's IT department to mitigate some of the risks to confidential company information.

Company allows use of personal tech devices for work purposes



Personally owns device used for work



Uses personal device for work without company knowing



Secured personal devices by company's IT department

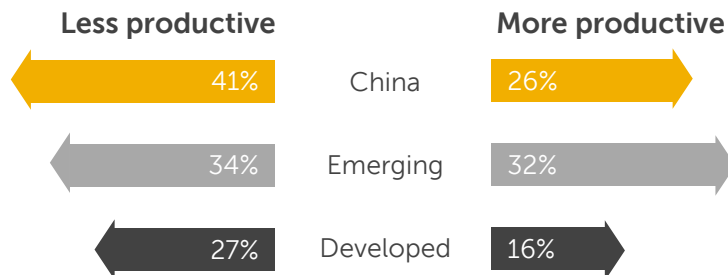


■ China
■ Emerging
■ Developed

The Productivity Debate: Office Workers vs. Remote Workers



Chinese employees have a traditional mindset when it comes to their views about the productivity levels of those working from home. While more than half of employees think that those working from home are just as productive or more than those in the office, another four-in-ten feel that home workers are less productive (which is a higher rate than other emerging markets).



Given these perceptions, it is no wonder that today's Chinese workforce sees a role for the central office well into the future.



59%

believe **the central office will continue to exist** at least in their lifetime

69%

For most employees, working from home is more of a perk than an expectation...



59%

think **the ability to work from home is an extra benefit** which I don't expect all employers to offer

68% Emerging
76% Developed

However...

4-in-10 32% Emerging/24% Developed

expect employers to offer the ability to work at home (a higher proportion than most other emerging markets).



The Secret to Happy Employees? Technology



Technology plays a key role for the Chinese workforce in getting their jobs done. More than nine-in-ten feel that technology has had an influence on the way they work in the past year with increases in productivity, communication, and collaboration.



Two-thirds

Of Chinese employees think it is **important to have the latest technology**

2/3

2/5 Developed

Only 35% would leave their job if the technology does not meet with their requirements, however, 87% say that the quality of the available technology would have at least some influence on their decision to accept a new position.

Influence of technology on work



Are more productive



Communicate faster with co-workers



Communicate faster with others outside company (customers, partners, vendors, etc.)



Collaborate easier with others outside company (customers, partners, vendors, etc.)



Collaborate more easily with co-workers all over the world



Have more virtual meetings and fewer in-person

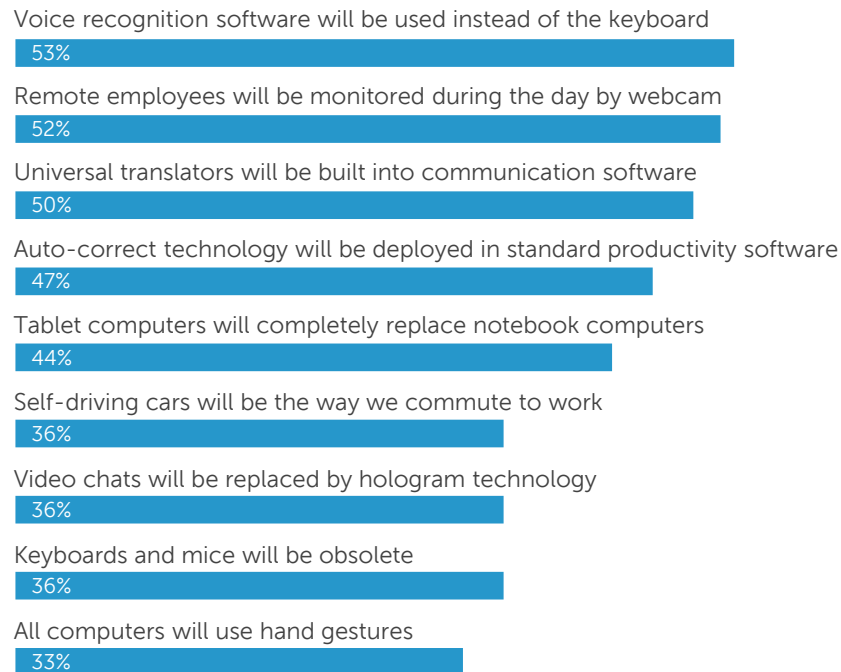


■ China
■ Emerging
■ Developed

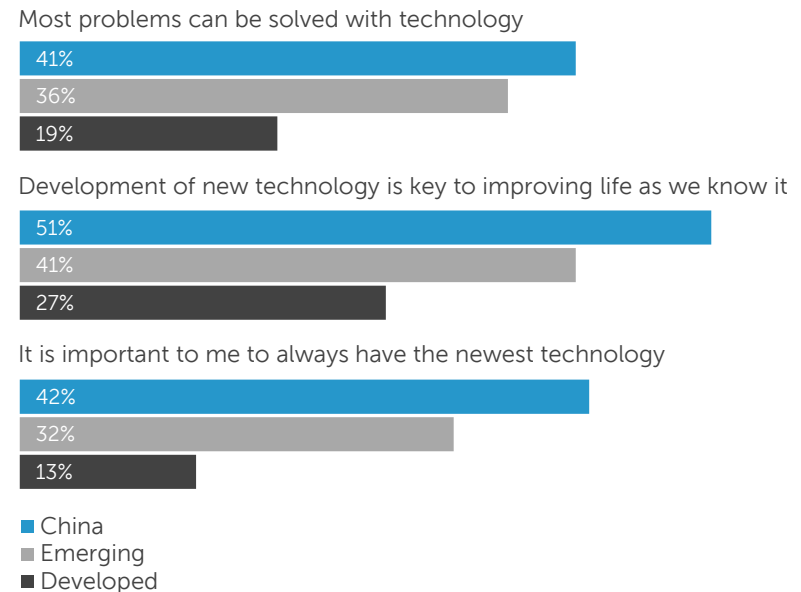
The Future of Tech in the Workplace is Bright, but Not Fully Automated



Employees are very optimistic about what the future of technology will bring to the workplace. Many foresee significant advancements in hardware, office software and other technologies all before the time in which they retire.



In addition, attitudes regarding technology are also more positive in China where employees have few concerns about technology replacing the need for humans in the workplace. Chinese employees are more likely than employees in nearly all other countries to agree that most problems can be solved with technology and that development of new technology is the key to improving life as we know it. However, 46% of Chinese employees also agree that technology is fine, but some things are just better done by people (vs. 65% in developed markets).





India

Though workplace perceptions and behaviors are rooted in tradition, employees in India are eager to embrace the latest technology and lead more contemporary work lives.

Most Indian employees still use desktops, say they are more productive when working from an office, and look to the office to foster collaboration and career development.

However, many Indian employees, especially executives, use and prefer mobile and touchscreen technology for work. Furthermore, technology plays a key role in keeping existing talent and attracting new talent. Nearly all of the Indian workforce consider it important to have the latest technology.

Frustration abounds though, with a consensus that Indian organizations only deploy new technology when absolutely necessary, available technology holds employees back and technology is hindering career growth.

Companies who don't invest in updated technology not only risk a loss of productivity, they also put themselves at a disadvantage for attracting, motivating, and retaining the talent needed to promote growth now and in the future.



One Size Doesn't Fit All

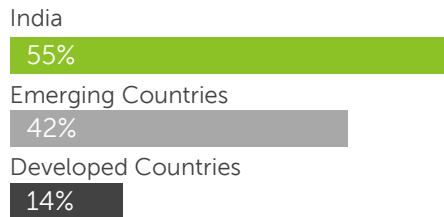


The desktop is the top device for getting work done in the office in India, as it is globally. Eight-in-ten employees use it for work, however, preference for desktops is low (48%).

Though the desktop is still widely used by executives, executives are far more likely than those in other roles to utilize portable technology including laptops (72%), tablets (41%) and 2-in-1s (29%). And we see multiple devices being used by most everyone.

Touchscreen usage for work is high (driven by executives), as is the desire to use touchscreens (38% among those not currently using).

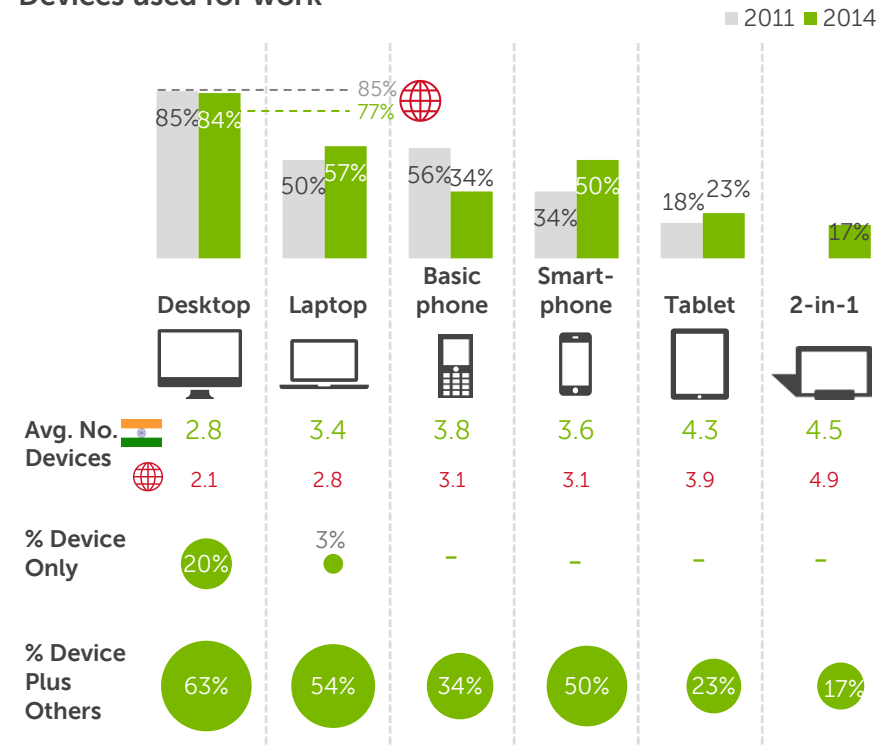
Use touchscreen for work



Performance (62% ranked #1) is by far the most important consideration people look for in a work device, followed by battery life (11%). This is likely due to the prevalence of desktops in the office.

When it comes to personal purposes, laptops (79%) are used more often than desktops (62%), as are smartphones (83%). These personal habits are likely shaping preferences for work devices.

Devices used for work*



The Office is King, but it's a Jungle Too

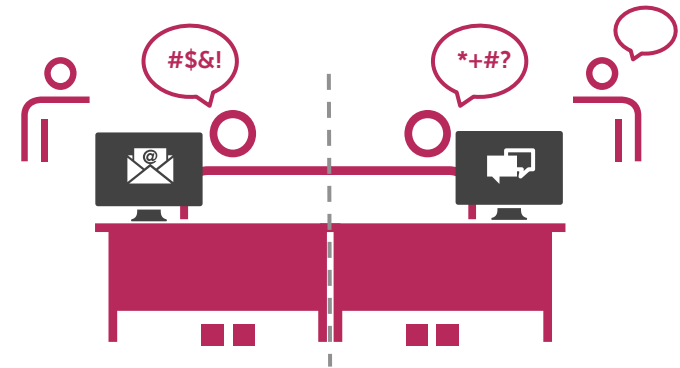


As technology is evolving, so is the office landscape. By far, most work is being done in the office of an employer. However, only one-third spend at least 75% of their time there. Much work is also being done in external locations (66%), in the home (78%) and in public places (62%).

Despite working in multiple locations, the office is the most conducive to high performance. 80% of workers say they do their best work in the office and 79% report being either extremely or very comfortable working at their office desk (as compared to 50% globally).

Productivity and comfort in the office may be partially due to the high proportion of other family members who are in the home while work is being conducted, with 91% indicating someone else is in the home with them.

Whereas in developed countries communication channels that involve personal interactions are generally preferred over more remote options, in India, remote options are almost tied with personal interactions: In person to online meetings 4:3; phone calls to instant messaging 4:3, and phone call to email 4:3.



52%
are **frequently interrupted**
while working at desk

45% Emerging
50% Developed

72%
use **email or IM**
to communicate with other
people located nearby

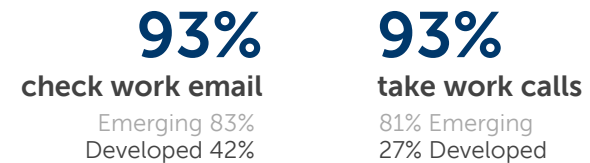
67% Emerging
37% Developed

Work Life + Personal Life = Life



About three-fourths of Indian employee say they spend some of their working hours from home, but many spend time working at home after hours. Indian employees are very assessable to work whereas almost everyone takes calls or checks email after hours. With this level of intrusion on personal time, it's no surprise that nearly all Indian employees use technology for personal purposes while at work.

Employers in India seem to understand that BYOD provides employees with the ability to use the device of their preference and 76% of companies allow this. Employers also recognize that It is important to secure personal devices for their employees (71% are secured by the company's IT department) to protect important confidential information. Many employees not authorized to use their existing devices handle their company's disapproval by doing it anyway: 65% do this without their employers' knowledge.



**while at home
(outside of business hours)**

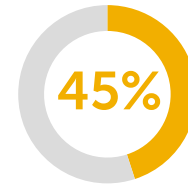
The Productivity Debate: Office Workers vs. Remote Workers



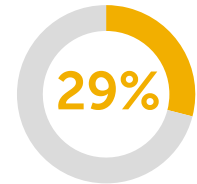
Indian employees have divergent views on whether remote workers are more or less productive than office workers. Middle/junior management are almost evenly split on their opinions, where executives are much more likely to believe those working at home are more productive.

Having the office is still perceived as important for team and togetherness (55% believe the central office will continue to exist at least in their lifetime), however, the flexibility working from home offers is very appealing. Additionally, being visible to management is also still very important for career development.

For most employees, working from home is more of a benefit than an expectation. Seven-in-ten view it as an extra benefit (comparable to other emerging markets).



Executive/senior management who think people working at home are more productive



Middle/junior management who think people working at home are more productive



The Secret to Happy Employees? Technology



There is a high priority placed on having the latest technology at work as nine-in-ten Indian workers consider it important (vs. six-in-ten of the global workforce/eight-in-ten emerging markets/four-in-ten developed countries).

Reinforcing this importance, roughly two-thirds would leave their job if the technology is not up to standards (a much higher proportion than other emerging markets), and two-thirds say the quality of the available technology would have a lot of influence on their decision to accept a new position (again, a higher percentage than other emerging markets).

Indian employees say...

They would likely quit job if the technology didn't meet with standards



The technology available would influence decision to take a new position



■ India
■ Emerging
■ Developed

Frustration with existing technology is evident: three-fourths of Indian employees feel that their organizations only deploy new technology when absolutely necessary, half of employees feel the technology they have available at work holds them back or keeps them from being productive, and just over one-third of employees feel that technology has hindered their career growth.

Technology has hindered career growth



Available technology at work prevents productivity



■ India
■ Emerging Countries
■ Developed Countries

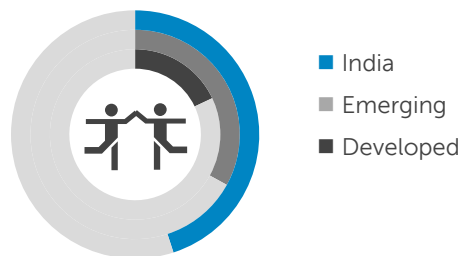
The Future of Tech in the Workplace is Bright, but Not Fully Automated



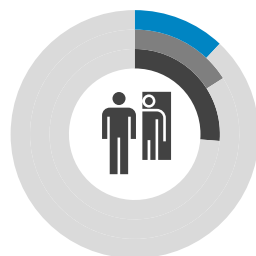
Employees believe that technology will continue the trend toward mobile, with roughly half expecting tablets to completely replace laptop computers before they retire.

In general, Indians are open to new technology: 45% feel technology brings people together, while only 12% feel technology separates people.

Technology brings people together



Technology separates people



38% of Indian employees agree that technology is fine, but some things are just better done by people (vs. 65% in developed countries).

Just under three-fourths believe that technology will hit a limit on the ability to improve productivity (although not any time soon). However, some feel advancements in technology will replace the need for humans in the workplace—about one-half think their jobs will be fully automated in their lifetimes.

Employees think their job will be fully automated...

Before I retire



Before I die



In the distant future (not during my lifetime)



Won't ever happen



■ India
■ Emerging Countries
■ Developed Countries



Japan

Though the workplace is changing, employees in Japan still have a traditional workplace mindset.

Japanese culture tends to place importance on working together as a community, so working from home is rare, though many expect to be offered the ability to work from home in the future. Surprisingly, over twice as many as work from home conduct work at external locations (such as a client's office).



Most still use and prefer to use desktops (though the gap between desktops and laptops is much smaller than other developed countries), say they are more productive when working from an office and prefer personal interactions over remote options. In addition, a high proportion of the Japanese workforce say that they wouldn't be happy without the technology they rely on each day.

As Japanese employees conduct more and more business during their personal time, employers can empower them with technologies that can foster that sense of community that is so important to this culture by enabling more communication and collaboration.



One Size Doesn't Fit All



As with global findings, the desktop is the top device for getting work done in the office in Japan, but that may be changing—desktop use has declined in the past two years, while portable options (laptop, smartphone, tablet) are on the rise.

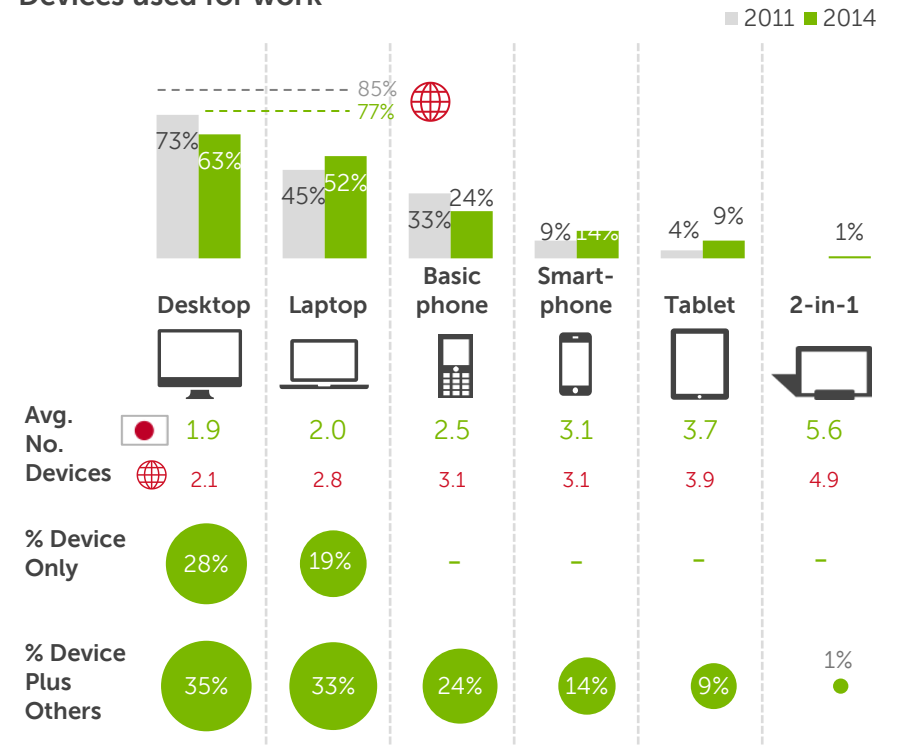
However, the high usage of laptops closes the gap between desktops and laptops that is seen in other parts of the world. In Japan, just under two-thirds of employees use desktops for work, with just over half using laptops (vs. 77% desktops and 40% laptops in the global workforce). Desktops are preferred by about half of employees, while laptops are preferred by about one-third of employees.

Tablets and 2-in-1s use is low, as is touchscreen use when it comes to work.

When it comes to personal purposes, laptops eclipse desktops. Surprisingly, basic mobile phone usage is on par with smartphone usage (this may be driven by the high proportion of those in the manufacturing industry).

Performance is the most important attribute people look for in a work device, followed by software compatibility.

Devices used for work*



Note: nearly half of respondents in Japan are in the manufacturing industry, which may be skewing results.

The Office is King, but it's a Jungle Too



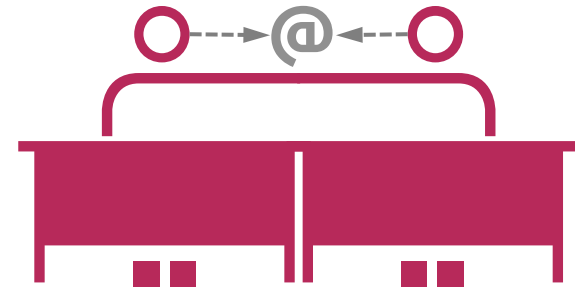
By far, most work is being done in the office of an employer. Almost all employees spend at least some time there, and eight-in-ten spend at least 75% of their time there (compared to just over half globally).

Not only is the office the most common place for getting work done, it's also the most conducive to productivity. 80% of workers say they do their best work there (compared to only 10% who say they do their best work at home).



Japanese employees prefer more personal forms of communication with in-person meetings winning out over online meetings (5-to-1 in Japan vs. 3-to-1 globally) and phone calls are preferred to instant messaging (5-to-1 in Japan vs. 2-to-1 globally).

Only 1-in-10 employees admitting to frequently emailing or IMing with other people located near them, which is significantly lower than in other countries. And despite more direct communication in the workplace, very few Japanese employees indicate that they are frequently interrupted while working in the office.



36%

are **frequently interrupted** while working at desk

45% Emerging
50% Developed

13%

use **email or IM** to communicate with other **people located nearby**

67% Emerging
37% Developed

Work Life + Personal Life = Life



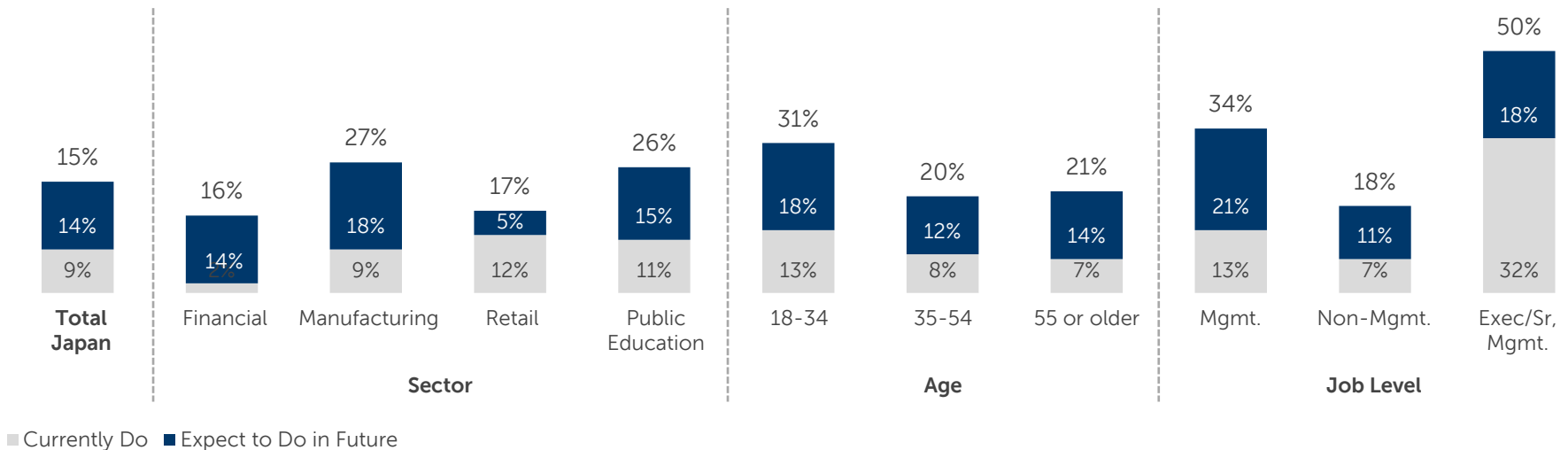
Less than two-in-ten Japanese employees say they spend some of their working hours from home (vs. five-in-ten globally). Culturally, Japanese prefer to work together as a community, so working from home is uncommon.

Only 14% of employees, regardless of age, expect to take their work technology home to work remotely in the future. This result jumps to 18% for people in manufacturing and those aged 18-34 and 21% for people in management roles.

Employees still end up taking work home as many take calls (25% Japan vs. 52% globally) or check email (35% Japan vs. 62% globally) after hours.

One-fourth of employers have BYOD policies available to their employees to allow the use of personal devices for work (vs. over one-half globally). However, some employees secretly use personal devices anyway: 30% of workers use personal devices for work without their employers' knowledge (vs. 43% globally).

Employees who take their work technology home to work



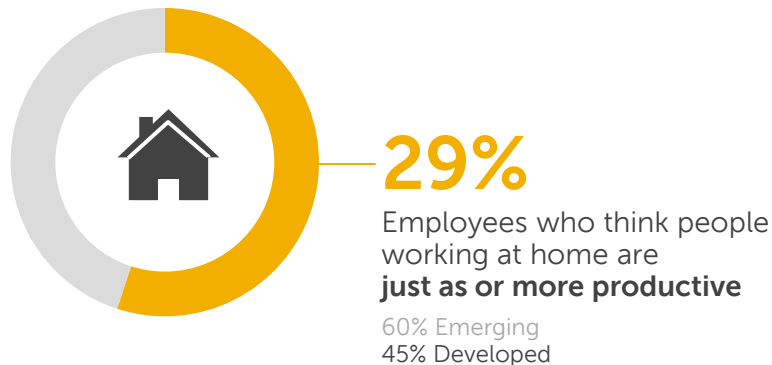
The Productivity Debate: Office Workers vs. Remote Workers



Overall, about one-fourth of Japanese employees think that those working from home are just as productive or more than those in the office (this percentage is lower than in other developed countries). Just over one-third are undecided on this subject.

Today's Japanese workforce believe there will always be a role for the central office, whereby 77% believe the central office will continue to exist at least in their lifetime (vs. 69% globally).

For most employees, working from home is more of a benefit than an expectation. However, just over one-third of Japanese employees say they expect all employers to offer the ability to work from home in the future—a much higher percentage than in other developed countries.



Expect all employers to offer the ability to work from home

Japan

35%

Emerging Countries

32%

Developing Countries

24%



The Secret to Happy Employees? Technology



Only one-third of the Japanese workforce consider it important to have the newest technology (vs. nearly two-thirds of the global workforce and just under half of other developed countries).

Nearly half say that technology in the past year has had a influence on the way they work and that they wouldn't be happy without the technology they rely on each day.

Very few people would leave their job if the technology is old (6%), and few (11%) say that the quality of the available technology would have at least some influence on their decision to accept a new position.

Importance of latest and greatest technology



Latest technology Influence new position



Likely to quit without latest technology



- Japan
- Emerging
- Developed



53%

wouldn't be happy
without the technology
they rely on each day

The Future of Tech in the Workplace is Bright, but Not Fully Automated



Attitudes of Japanese employees are varied compared to other developed and emerging markets. Few people (8%) believe technology brings people together, while 18% feel it separates people. These polarizing sentiments are more pronounced in other parts of the world.

Technology is linked to happiness for employees in Japan with 53% indicating they wouldn't be happy without the technology they currently have, but also express the opinion that technology is advancing more quickly than we can keep up with it.

Two-thirds believe that technology will hit a limit on the ability to improve productivity (although not any time soon). And advancements in technology won't replace the need for humans in the workplace—only one-fifth think their jobs will be fully automated in their lifetimes. And over half of Japanese employees think that offices will become completely paperless in their lifetime, slightly higher than other developed countries.

Believe there will be no more printing during their lifetime—offices will become completely paperless

Japan

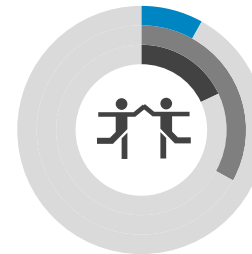
55%

Emerging

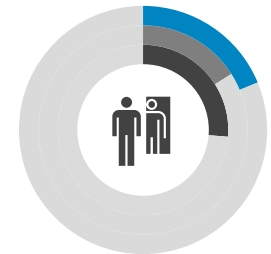
57%

Developed

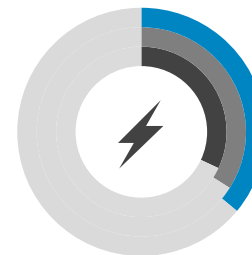
Technology brings people together



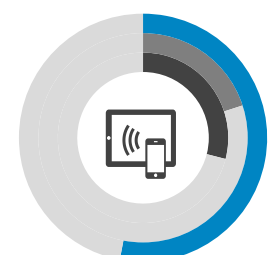
Technology separates people



Technology is advancing faster than we can keep up with it



Wouldn't be happy without the technology I have today



■ Japan
■ Emerging
■ Developed

