



DIGITAL WORKPLACE INSIGHTS: Seeking Digital and Experience Parity to Support the Hybrid Workforce

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In This White Paper

The COVID-19 pandemic illustrated why organizations need to be able to rapidly adapt and respond to business disruptions. However, it will not be the last disruption organizations face.

The digital economy, which relies heavily on the continued flow of goods and services around the globe, transformational technology platforms, and business innovation, will create more cycles of disruption to business operations and business models than has any other economic period. Organizations succeeding in the digital economy need to excel at pivoting rapidly as disruption happens.

IDC defines *digital resiliency* as the ability for an organization to rapidly adapt to business disruptions by leveraging digital capabilities to not only restore business operations but also capitalize on the changed conditions. In recent IDC research, respondents indicated that 17–19% of their organization's technology expenditures for the years 2021 and 2022 will go toward projects that address workforce, customer experience, or operations changes triggered by the COVID-19 pandemic.

In the same study, 55% of respondents indicated that investments in workplace transformation programs such as collaborative workspaces, talent development, and management tools to increase employee experience and productivity will be a priority investment area over the next two years to ensure the long-term resilience and success of the business (source: IDC's *Future Enterprise Resiliency and Spending Survey*, February 2021, n = 738).

One of the most unexpected outcomes of 2020 was the rapid technology, process, and policy adjustments that most organizations have made to support hybrid ways of working. An effective hybrid workforce demands *digital parity* — that is, all workers have secure access to the resources required to do their jobs, no matter their preferred device or if they are onsite, remote, or in the field. However, as we recover from the recent health crisis, the most successful organizations will go one step further and ensure experience parity, offering an excellent employee experience for a hybrid workforce and enabling agile ways of working and support that drive collaboration and innovation, anytime, anywhere, and on any device.

This IDC white paper looks at the changes required for the resilient, reimagined workplace — a democratized work environment, where all employees have the opportunity to collaborate, learn, develop, innovate, and succeed. The reimagined workplace requires a rethinking of work as we know it, including views on technology deployment and support, productivity, security, and employee experience — including generational differences.

Methodology

In November of 2020, IDC designed and executed a worldwide survey targeting employees and decision makers to gain deep understanding on how COVID-19 impacted business leaders' planning and goals and how employees perceived their own experiences. The survey included 560 business leaders and 558 employees across North America, EMEA, AP, and Latin America. "Business leaders" were director-level or above respondents who are primary decision makers or influencers regarding workplace and work transformation initiatives, including technology, process, vendors, and policies.

One of the most unexpected outcomes of 2020 was the rapid technology, process, and policy adjustments that most organizations have made to support hybrid ways of working.

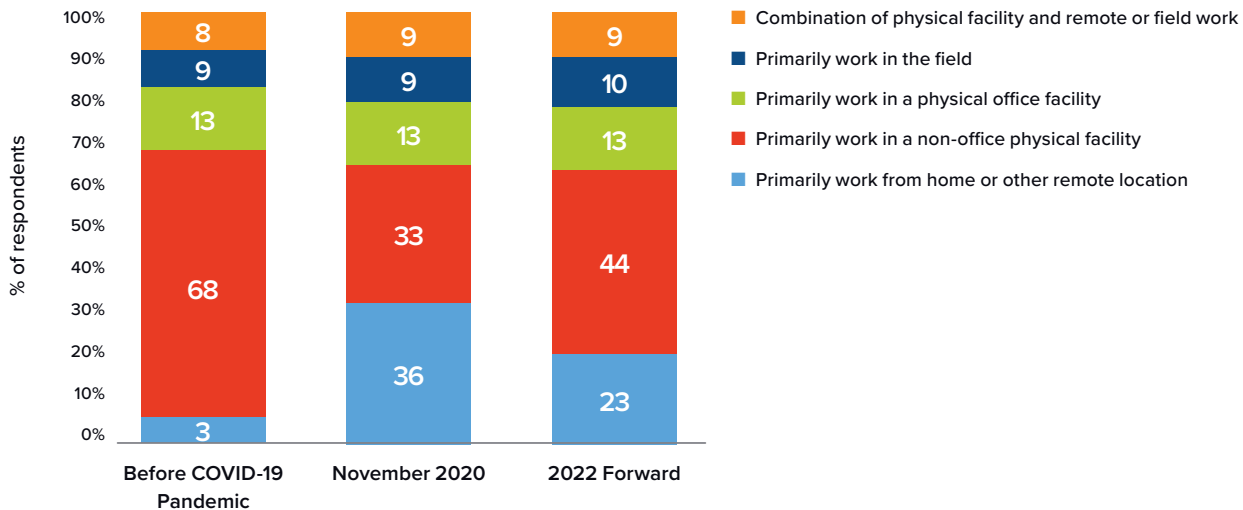
Situation Overview

Without a doubt, 2020 was a year that tested business resilience across all industries, geographies, and company sizes. But one of the most unexpected outcomes of 2020 was the rapid technology, process, and policy adjustments that most organizations have made to support hybrid ways of working. Across the globe, almost 40% of the workforce was forced to shift to remote ways of working almost overnight, while the remaining 60% continued to adapt and find new, safer ways to do its job. Now we know that, for most, there will be no return to the business models of 2019. Remote employees will continue to make up almost one quarter of the global workforce, albeit with some variability across industries. The hybrid workforce — remote, onsite, in the field, and transitioning between locations — is here to stay, and the temporary changes organizations put into place throughout 2020 must become permanent going forward (see Figure 1).

FIGURE 1

The Hybrid Workforce Is the New Normal

Q. What percentage of your organization’s workforce was, is, or is expected to be in each of the following categories?



Source: IDC’s Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders

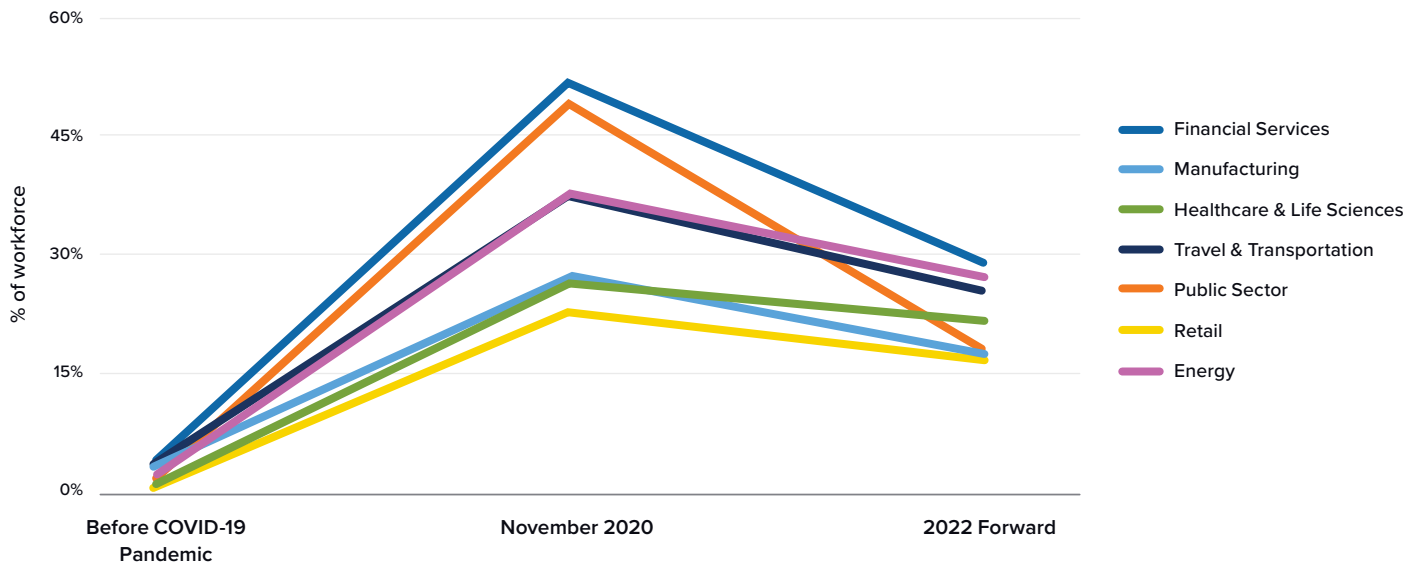
This data is relatively consistent across regions, though Europe, the Middle East, and Africa (EMEA) and Asia/Pacific (AP) started with slightly more employees working remotely pre-COVID-19, with more remaining remote in the future. Of course, not every worker can do their job remotely, and we will see significant differences by industry and role. Not surprisingly, the manufacturing, retail, and healthcare industries saw fewer remote workers, while respondents from financial services indicated that more than half of their workforce was working from home at the end of 2020 (see Figure 2).

Nonetheless, all industries will see a permanent increase in the number of remote workers. Further, the infrastructure, policies, and processes created to support the 3% of employees working from home before the pandemic did not effectively scale to meet most enterprise requirements and are not the long-term solution for effectively, securely, and profitably supporting a hybrid workforce that looks quite different from the workforce of the pre-pandemic era. IT organizations, in particular, must start thinking of how to securely support an extensive, distributed, and standardized “branch of one,” as opposed to the remote support models from 2019 and earlier.

FIGURE 2

Primarily Work from Home by Industry

Q. What percentage of your organization’s workforce was, is, or is expected to be in each of the following categories? (remote, non-company-owned location)



Source: IDC’s Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders

In addition, even before the onset of the pandemic, frontline and field-workers were increasingly becoming digitally enabled “knowledge workers” requiring sophisticated technical services and support, and this trend accelerated last year. Of course, those working onsite also have new requirements for safety and productivity, creating new demands on IT resources.

In our recent survey, 64% of business leaders indicated that their organization plans to adopt a different operating model than it had before the COVID-19 pandemic, not only to ensure employee safety but also to create a better employee experience and increased employee productivity. Many of these changes will become a permanent fixture of the business landscape going forward (see Figure 3).

FIGURE 3

New Operating Models for Productivity and Experience

Q. Your organization plans to adopt a different operating model than you had before the COVID-19 pandemic. What factors are driving that decision?



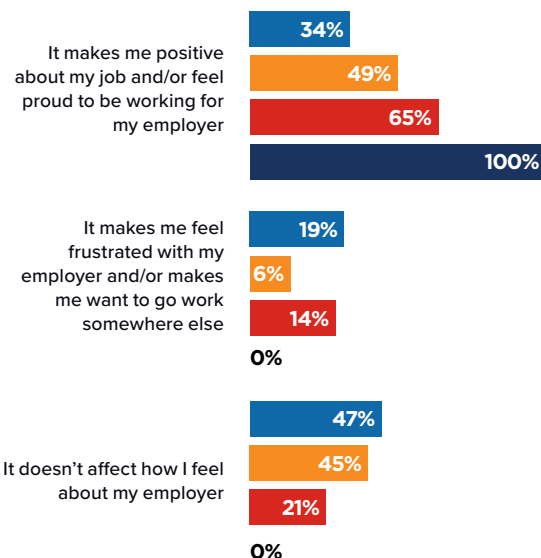
Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 356 business leaders

Key components of the new operating model are the technology deployed and support for that technology. These factors play a large role in the overall employee experience, particularly for younger workers. Generational differences regarding attitudes toward their employers based on tools and support provided by those employers were highlighted during the pandemic. Millennials, the largest and fastest-growing segment of the workforce, are most likely to consider technology and support an important part of their work experience, while it matters less to earlier generations (see Figure 4).

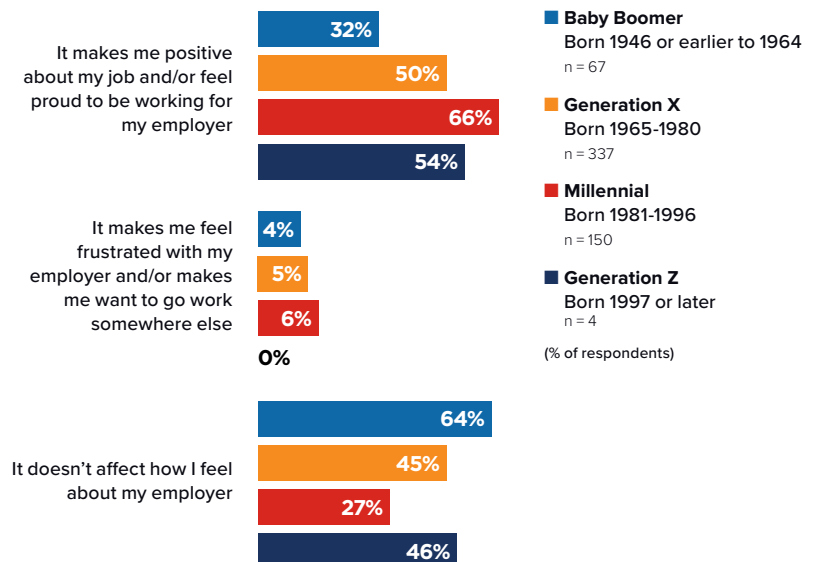
FIGURE 4

Technology and Support Are Key to Experience for Millennial Workers

Q. How does the technology you use at work make you feel about your employer?



Q. How does the technology support you get at work make you feel about your employer?



■ **Baby Boomer**
Born 1946 or earlier to 1964
n = 67

■ **Generation X**
Born 1965-1980
n = 337

■ **Millennial**
Born 1981-1996
n = 150

■ **Generation Z**
Born 1997 or later
n = 4

(% of respondents)

Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 558 employees

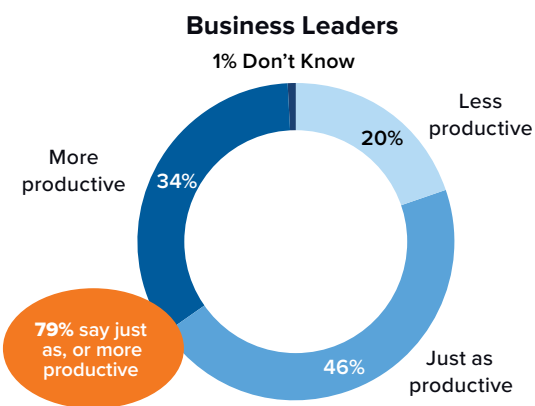
Remote Work and Employee Productivity

Early in the pandemic, as employees shifted to remote work, a top concern of business leaders was a drop in employee productivity. According to IDC's global survey conducted in April 2020, business leaders indicated that concerns about productivity was the top challenge facing their organization with regard to supporting work-from-home employees (source: IDC's *COVID-19 Impact on IT Spending Survey*, April 2020, n = 582). However, as the months unfolded, the opposite has proven to be true. Both business leaders and employees agree that remote work is just as productive or more productive than work done at a company facility. This data is relatively consistent across regions, though respondents from AP were slightly more skeptical, with only 74% of business leaders and 70% of employees saying that remote work was just as or more productive. EMEA employees were the most concerned about remote productivity, though two-thirds still said that it was more or just as productive (see Figure 5).

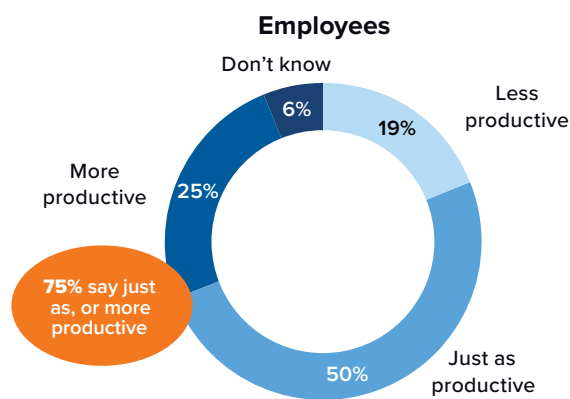
FIGURE 5

Leaders and Employees Agree That Remote Work Is Productive

Q. Compared to working from a company location, employees working from home or other remote location are ...



Q. Compared to working from an office location, in your opinion is working from home or other remote location ...



Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders, n = 558 employees

Nevertheless, a number of challenges threaten productivity. More than one-third of business leaders in our survey indicated that one or more of the following were challenges for their employees:

- Communicating with other team members
- Unreliable connectivity and/or insufficient bandwidth
- Difficulty using unfamiliar or new work-from-home technologies
- Difficulty accessing essential data, content, and/or applications
- Receiving effective IT support
- Inability to focus due to non work-related commitments

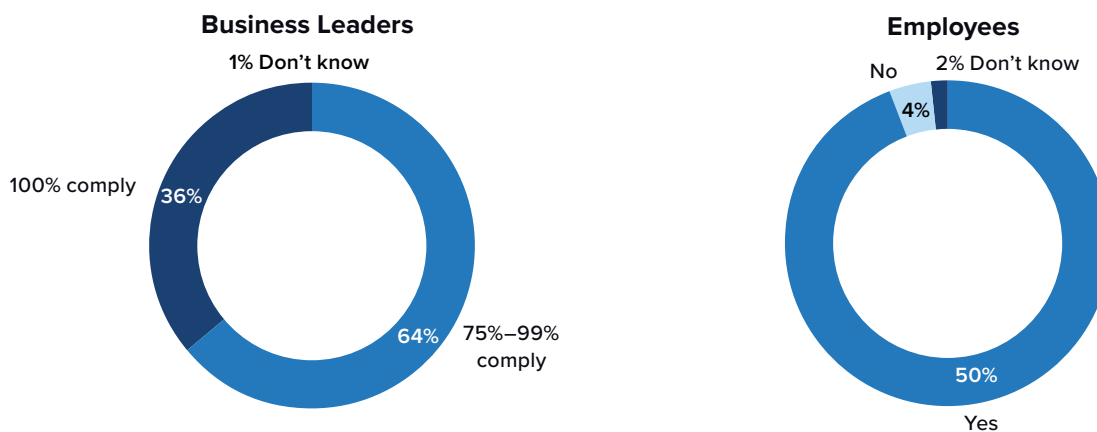
In addition, security remains a top concern. Although most business leaders and employees across all regions believe that workers are following corporate security protocols (see Figure 6), business leaders understand that security technologies and policies need to be updated to support a hybrid workforce. More than one-third of respondents in an October 2020 survey indicated that their organization would increase spending on secure remote access (i.e., software that provides network, application, and data access for remote or mobile workforces) (source: IDC's *COVID-19 Impact on IT Spending Survey*, October 2020, n = 679).

FIGURE 6

Employees Follow Security Practices

Q. In your opinion, what percentage of your organization's employees are following organizational security practices when they are working remotely?

Q. Do you follow organizational security practices when you are working remotely?



Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders, n = 558 employees

Business leaders acknowledge that security challenges remain, including the lack of visibility into employee activities and employees' use of personal devices to access corporate resources (see Figure 7). Use of personal devices was cited more frequently by respondents in Latin America and AP than those in North America and EMEA. Nevertheless, their concern is not unfounded: In an August 2020 survey in the United States, 90% of respondents indicated that their organization had experienced a security breach in the past 12–24 months (source: IDC's *U.S. Managed Detection and Response Services*, August 2020, n = 410).

FIGURE 7

Business Leaders Face Security Challenges

Q. In terms of securing remote workers, what are/were your organizations biggest challenges?



Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders

A New Focus on Employee Experience

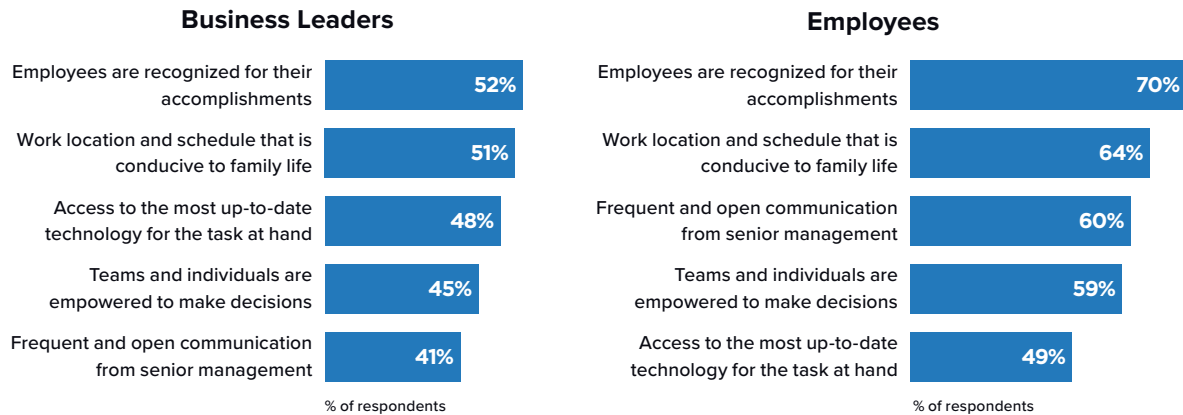
As we move toward recovery, there is a realization that an engaged and trusting workforce is the core to successful business outcomes. The same October 2020 survey asked C-level executives what HR metrics should be added in 2021, and the top answer (60% of executives) was an employee Net Promoter Score (NPS) to measure and gauge employee satisfaction, with employee mental health and happiness metrics and diversity and inclusion not far behind

Providing mature employee experience programs leads to significant organizational resilience with more committed, productive employees with longer tenures, all contributing to faster recovery trajectories. Business leaders and employees are aligned on what creates a positive employee experience, although the data indicates that employees are more emphatic in their choices. Recognition for accomplishments and work location and schedule that are conducive to family life top the list for both groups. However, the data also indicates that business leaders should put greater emphasis on transparency and frequent communication with employees (see Figure 8).

FIGURE 8

Leaders and Employees Aligned on EX Criteria

Q. Other than salary and benefits which of the following criteria makes an ideal employee experience?



Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders, n = 558 employees

Not surprisingly, employee health and safety are important components of employee experience for those working from a company facility, whether it is full time, part time, or occasionally. More than two-thirds of business leaders and nearly 60% of employees indicated that a modified work schedule such as staggered and/or flexible shifts will be an important part of policy going forward. Reconfigured spaces and increased sanitation top the list of physical changes for both leaders and their workers. These changes aren't temporary — in many cases resulting in new policies, processes, and facilities and how those facilities are being used — and will be permanent fixtures of the transformed work environment (see Figure 9).

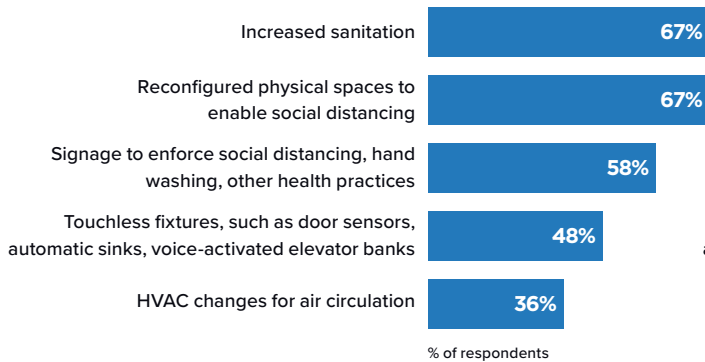
Reconfigured spaces and increased sanitation top the list of physical changes for both leaders and their workers.

FIGURE 9

Physical Changes at Corporate Facilities

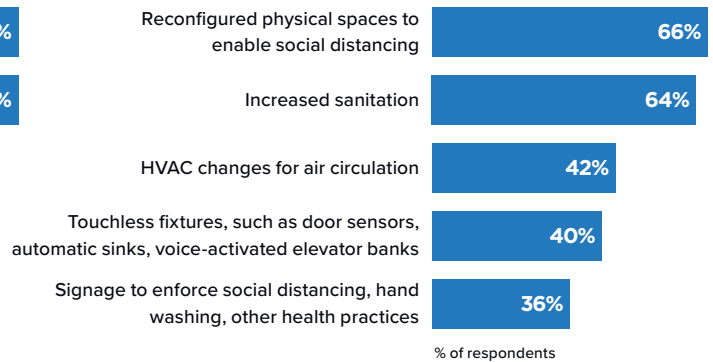
Q. What changes will be made to your corporate facilities in the future?

Business Leaders



Q. What does/will it take for you to feel comfortable working in your organization's corporate facilities in the future?

Employees



Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders, n = 558 employees

Cloud Supports Better Employee Experiences

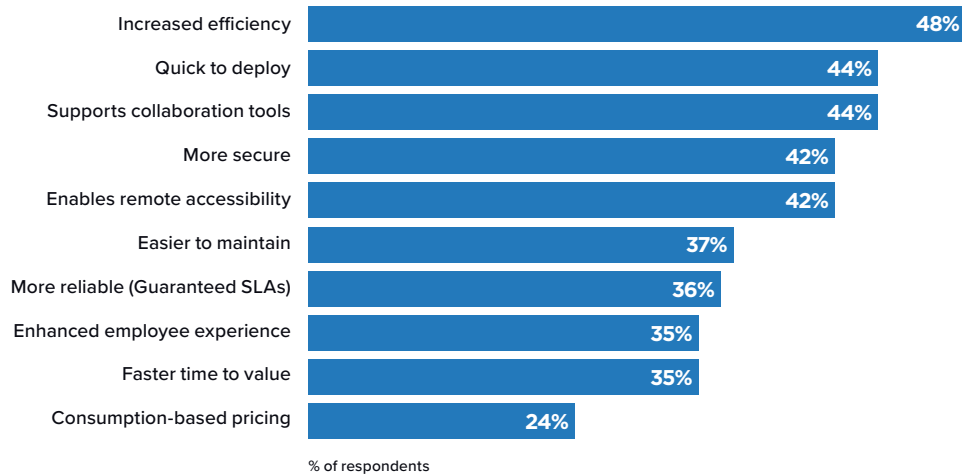
In a September 2020 survey, IDC asked decision makers to indicate which areas will likely be permanently changed as a result of the COVID-19 pandemic. More than 35% said their organization will accelerate the use of cloud as the underlying platform for IT and business automation initiatives (source: IDC's *COVID-19 Impact on IT Spending Survey*, September 2020, n = 649). Business leaders in our recent survey agree that, in addition to increased efficiency and ease of deployment, important benefits of cloud computing include facilitating collaboration and enabling remote accessibility — addressing some of the challenges of remote work noted previously. More than one-third noted that a key benefit of cloud deployment is enhanced employee experience (see Figure 10).

Today, according to the business leaders in our survey, almost one-third (29%) of workloads are still in the datacenter. Among the top challenges with moving to the cloud are security concerns (36%) and difficulties with regulatory compliance (31%).

FIGURE 10

Cloud Benefits

Q. What do you see as the biggest benefits from cloud computing?



Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders

Approaching the Future — What Does This Mean for Business Outcomes?

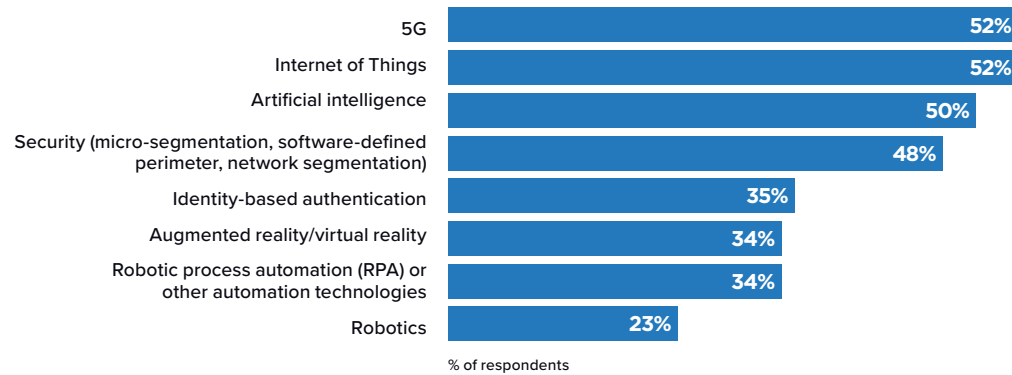
As noted previously, 64% of business leaders indicated that their organization plans to adopt a different operating model than it had utilized before the COVID-19 pandemic, not only to ensure employee safety but also to create a better employee experience and increased employee productivity. But the most important lesson that has come from the health crisis is the need for flexibility and agility. Business continuity and resiliency are dependent on the ability to rapidly adapt to changing conditions, not only a future health crisis but also weather events, political changes, sustainability requirements, and other situations that have impacts on workforce dynamics.

Although a third of respondents to our survey were still focused on the basics of business continuity, 42% are making targeted investments to generate growth or are prioritizing innovation as they recover from the pandemic and make plans to thrive in the post-COVID-19 era. Half of the respondents indicated that investment in digital transformation technologies, including 5G, IoT, AI, and modern security platforms, will provide the greatest benefits to their organization's work environment in the next five years (see Figure 11). These leaders are focused on driving profitability and revenue — and perhaps most importantly digital resiliency — while the laggards are still mired in reacting to the pandemic with a focus on cost savings.

FIGURE 11

Technology Investments for the Future

Q. Which of the following technologies will provide the greatest benefits to your organization's work environment in the next five years?



Source: IDC's Unisys Digital Workplace Insights Survey, November 2020 | n = 560 business leaders

Challenges/Opportunities

Creating a resilient hybrid work environment is not without its challenges, including:

- Training and enabling first-line managers to be able to effectively lead distributed teams
- Ensuring that leadership is supportive of a more agile, outcome-focused approach and has implemented required KPIs
- Creating learning in the flow of work for continuous upskill and cross-skill requirements, no matter the role or location
- Onboarding and training new employees who may be geographically remote and/or outside of an organization's core regions

In addition to greater resiliency, and ensuring business continuity, opportunities include:

- Attracting and retaining top talent in a broader geographical area
- Greater customer engagement and satisfaction supported by an empowered workforce
- Increased innovation by removing barriers to work

Conclusion—Reimagining the Digital Workplace

IDC defines *digital resiliency* as the ability for an organization to rapidly adapt to business disruptions by leveraging digital capabilities to not only restore business operations but also capitalize on the changed conditions. One requirement for digital resiliency is digital parity, the requisite that all workers have secure access to the resources required to do their jobs, no matter their preferred device or if they are onsite, remote, or in the field. However, the most successful organizations will go one step further and ensure experience parity, offering an excellent employee experience for all workers and enabling agile ways of working and support that drive innovation anytime, anywhere, and on any device and resolve problems quickly. Experience parity means a democratized workplace, where all employees have the opportunity to collaborate, learn, develop, innovate, and succeed.

This requires business leaders to reimagine the digital workplace. The reimagined workplace requires leadership and policy support across the entire C-suite, including the COO, CIO, CHRO, and legal teams, and including new KPIs for measuring business outcomes. Leaders must:

- Provide all workers with an agile and time-, location-, and device-agnostic digital workspace. This means providing the infrastructure, software, and support for secure, frictionless digital access to people, data, and applications anytime, anywhere.
- Develop the workplace infrastructure, device support, policies, and procedures for safe, dynamic, in-person access to people and resources on premises.
- Establish an IT and support strategy with an increased focus on employee experience, while not sacrificing security at any level. Emphasize proactive support and self-healing as well as long-term support through increased use of remote-assisted channels such as video and text chat.
- Measure and track employee experience on an ongoing basis, and actively adjust infrastructure, policies, and processes as needed.

One requirement for digital resiliency is digital parity, the requisite that all workers have secure access to the resources required to do their jobs, no matter their preferred device or if they are onsite, remote, or in the field.

About the Analyst



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Holly Muscolino is the Research Vice President, Content Strategies and the Future of Work, responsible for research related to innovation and transformation in content solutions, including intelligent document processing, e-signature and other and content workflow services. Ms. Muscolino's core coverage also includes work transformation and the role of technology in driving the Future of Work.

[More about Holly Muscolino](#)

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