Cloud Workers Are Key To Disruption Preparedness: A Spotlight On Europe

Europe Results From The May 2020 Thought Leadership Study, "Cloud Workers Are Key To Disruption Preparedness"

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> "Cloud workers" are information workers who rely on their browsers to access cloud-based apps for their jobs and expect access to tools they need to get their jobs done anytime, anywhere.

> ITDMs are increasingly focused on employee productivity as a high or critical priority.

Introduction

In a world of increasing uncertainty and disruptive events, leveraging the benefits of cloud technologies and endpoints is more crucial than ever before. When the global pandemic hit in early 2020, enterprises around the world were faced with the reality that remote work is not the future of work; it is the present. Firms that can support their workers — anywhere and anytime — are best positioned to ensure business continuity while also enhancing employee experience (EX). Such businesses can adapt and thrive during these disruptive times.

In January 2020, Google commissioned Forrester Consulting to evaluate workforce cloud technology trends. Forrester surveyed 969 enterprise IT decision makers (382 in Europe) and 1,356 global information workers (496 in Europe). This pre-pandemic data snapshot revealed that "cloud workers" — a subset of information workers who rely on their browsers to access cloud-based apps for their jobs and expect access to tools they need to get their jobs done anytime, anywhere, and on any device — now make up more than a third of European workers. In today's remote working environment, supporting a cloud workforce is not a luxury but a necessity for firms to enhance EX and ensure resiliency.

KEY FINDINGS

› **Information workers move to the cloud.** In Europe, 40% of information workers are cloud workers who use a device for work and use cloud apps and browsers vigorously. In general, all information workers are starting to aspire to work more like cloud workers. During a typical day, cloud workers spend more than half of their time (58%) on a device completing tasks on a web browser, with information workers tracking in the same direction (47%).

› **Enterprises are focused on EX, and cloud-based apps deliver.** As the workforce becomes increasingly remote, IT organizations value and prioritize EX. IT decision makers report that investing in technology that improves employee productivity (72%) and technology that improves employee experience (67%) are high or critical priorities over the next year. They are increasingly turning their focus to cloud-based solutions to deliver those experiences

› **Enterprises turn to the cloud to enable their workforces to face disruption head-on.** Sixty-eight percent of IT decision makers agree that giving workers access to business applications anytime, anyplace, from any device is now business-critical. Equipping workers with cloud-based technology not only enhances their experience and productivity but also leads to resiliency in the face of disruption. IT decision makers can leverage cloud-based strategies to drive resiliency by investing in endpoint security, collaboration, and browser security.

68% of IT decision makers agree that giving workers access to business applications anytime, anyplace, from any device is now business-critical.

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Information Workers Move To The Cloud

SUPPORTING THE CLOUD WORKFORCE OF TOMORROW TODAY

The COVID-19 pandemic has accelerated the move to remote work in Europe and around the globe. Remote work is now essential for business continuity and employee retention.[1] Remote workers are increasingly turning to cloud-based solutions to do their jobs. Supporting these remote information workers requires enterprise leaders to set them up for success — equipping them with cloud-based tools to work with flexibility and agility — anytime, anywhere.

Both in Europe and globally, cloud workers are commanding a larger presence in the workforce, and cloud usage is only increasing. In surveying 496 information workers and 382 IT decision makers in Europe, we found that:

› **Information workers are becoming cloud workers.** In Europe, 40% of information workers are cloud workers, higher than the 37% global average (see Figure 1). Not only do cloud workers make up a sizeable chunk of the workforce, but our study shows how information workers are working more like cloud workers. During a typical day, cloud workers in Europe spend more than half of their time (58%) on a device completing tasks on a web browser, with information workers tracking steadily in the same direction (47%). Barriers are low: Only 7% of information workers say they find browsers more difficult to use than desktop applications (see Figure 2).

Figure 1

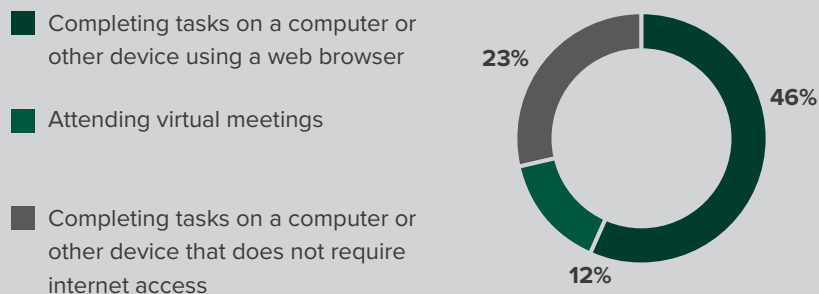Four in 10 (40%) information workers in Europe are cloud workers.

Cloud workers:

1. **Use a laptop and/or tablet for work.**

2. **Use cloud apps daily.**

3. **Spend at least 37.5% of the day (about 3/8 hours) completing tasks in a browser or attending virtual meetings.**

Base: 496 EMEA enterprise information workers who use cloud applications at least weekly for work.
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020

Figure 2

"During a typical day in your current role, what percentage of your time do you spend doing the following activities today?" (Showing mean %)

■ Completing tasks on a computer or other device using a web browser

■ Attending virtual meetings

■ Completing tasks on a computer or other device that does not require internet access

46%

23%

12%

Base: 496 EMEA global enterprise cloud workers
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020

Cloud workers spend 58% of their device time in a browser or virtual meetings.

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› **Cloud-native device usage is growing.** Empowered workers require the cloud, and IT organizations are looking to support their increasingly cloud-based information workers. Cloud-native device usage is expanding; nearly half (49%) of IT decision makers report their firms have either implemented or plan to implement cloud-based computers for their workforce in the next 12 months. To that end, a third (33%) of the information workforce uses cloud-native computers (see Figure 3).

Figure 3: Cloud Device Usage Expanding

Which of the following represents your organization's current adoption or willingness to adopt cloud-based computers for your workforce?

Implemented/expanding to more employee groups	**21%**
Planning to implement in the next 12 months	**30%**

Base: 382 enterprise technology decision makers in nine countries who oversee workforce devices and cloud applications
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020

ENTERPRISES ARE FOCUSED ON EMPLOYEE EXPERIENCE, AND CLOUD-BASED APPS DELIVER

EX has become a hot topic with good reason: Happy employees make for happy customers, and employee engagement improves not only productivity, but also creativity.[2] As the workforce is increasingly remote, IT organizations value and prioritize productivity and employee experience. Their top priorities this year include investing in technologies that improve employee productivity (72%), improving endpoint security (70%), investing in technologies that improve customer experience (68%), and expanding use of cloud-based applications for employees (64%).
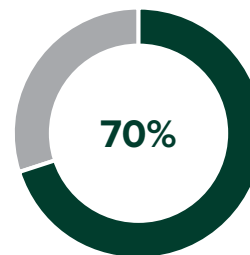
A cloud-first strategy addresses firms' strategic priorities and the needs and preferences of information workers. Information workers depend on universal access: Seven in 10 (70%) information workers find the ability to access work files and apps from anywhere on any device to be very or extremely important. Similarly, most workers (66%) like being able to work on any device simply by going to their browser (see Figure 4).

70% of information workers find the ability to access work files and apps from anywhere on any device to be very or extremely important.
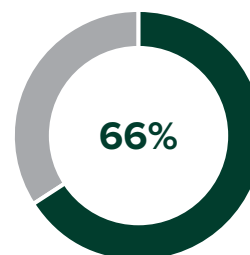
On average, **33%** of European information workers use cloud-native computers.

Figure 4: Information Worker Device Needs And Preferences

70%

Find the "ability to access work files and apps from anywhere, on any device" very or extremely important.

66%

Somewhat/strongly agree that "I like being able to do work on any device simply by going to my browser."

Base: 496 EMEA global enterprise information workers
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020

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Enterprises Turn To The Cloud To Enable Their Workforces To Face Disruption Head-On
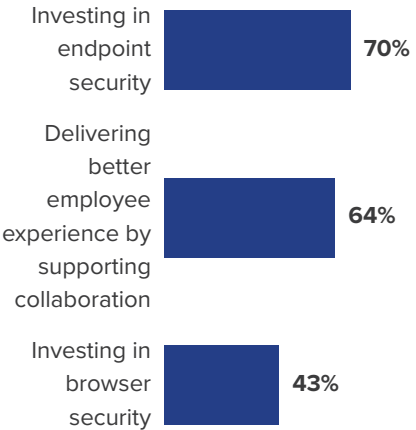
IT decision makers — who are focused on empowering employee experiences — are migrating and building out cloud strategies to enable their workforces to face disruptive events head-on. In times of uncertainty and disruption, firms that can support employee productivity with cloud-based end user computing are best positioned to drive EX, productivity, and resiliency. IT decision makers are:

› **Focusing on cloud migration.** Public cloud usage is high and expected to grow. Eighty-three percent of decision makers report their enterprises either have a cloud-first strategy or are prioritizing cloud, including a third (32%) whose firms have a cloud-first strategy today and use cloud solutions to support most or all of their business needs. By the end of 2021, 29% of end user applications are expected to run on the public cloud, according to our pre-pandemic snapshot. In addition, 73% of European IT decision makers indicate that their organizations will aim to provide all employees with cloud-based access to business applications. Similarly, most (76%) agree that their organizations have made it a clear goal to migrate most workloads to the cloud over time. In today's challenging environment, "over time" may translate to "today."

› **Addressing workforce challenges to better realize the full benefits of cloud investments.** Even with the growth of cloud, there is still more work to do on deploying business applications via the cloud. Nearly eight in 10 (79%) decision makers agree that though their organizations successfully migrated some key applications to the cloud, "more work remains to be done." In turn, about half (53%) of organizations' applications could be assessed via a browser, showing room for growth.

The top challenges to workforce productivity that IT decision makers in Europe point out are security concerns (41%) and keeping pace with employee needs (38%). Cloud technologies can effectively address the challenge of keeping pace with employee needs. But security underpins these experiences for workers: 69% of European employees prioritize user privacy and 72% the security of their company's data.

› **Unlocking cloud benefits to ensure crisis readiness.** Sixty-eight percent of IT decision makers agree that giving workers access to business applications anytime, anyplace, from any device is now *business-critical*.

IT decision makers must leverage cloud-based strategies to drive resiliency by prioritizing endpoint and browser security, as well as collaboration capabilities (see Figure 5).

73% of IT decision makers will aim to provide all employees with cloud-based access to business apps by the end of 2021.

Figure 5

IT Initiative Priorities (High and critical)

Investing in endpoint security — 70%

Delivering better employee experience by supporting collaboration — 64%

Investing in browser security — 43%

Base: 382 EMEA enterprise technology decision makers who oversee workforce devices and cloud applications
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020

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Key Recommendations

European enterprises are moving toward a model of cloud work. Four in 10 European information workers already qualify as cloud workers who take a browser-centric, highly connected approach to their workday. A strong majority of other information workers aspire to solving the same problems cloud workers have already solved. And IT decision makers are now more frequently taking a cloud-first approach to architecting workforce technology solutions. Forrester's in-depth survey of European employees and IT decision makers about cloud work yielded several important recommendations:

Use cloud to address key employee needs. European information workers share many needs and desires of cloud workers; they just haven't migrated to the same usage levels. Today's global challenges — like the COVID-19 pandemic and climate change — are driving enterprises toward a future with increasing levels of anywhere work. Migrating information workers' technology stack to the cloud will solve both their current and future needs.

Analyze cloud deployments through the lens of EX. Building a business case for investments in cloud work technologies should place EX directly into the analysis. How much more engaged, focused, and productive can your employees be with cloud-powered enablement? For example, information workers overwhelming desire the convenience of accessing applications and files from any device, driving convenience.

Build in IT fundamentals alongside employee experience. In the past, EX and IT were seen as being at odds. Now, we see that European employees and IT decision makers share certain key goals: Being able to drive anywhere work and high levels of security are important to both. Cloud work complements a number of key IT priorities: security, business continuity and resilience, and worker productivity, among others. Look for win-win situations in which both employees and IT benefit.

Move from a remote work policy to an anywhere work strategy. The COVID-19 crisis precipitated a reevaluation of remote work policies out of necessity. But the impacts will be long-lasting; Forrester's data shows that 48% of decision makers expect a permanently higher rate of full-time remote employees, and most organizations will move to some kind of hybrid model.[3] Why? Because the systemic risk profile of the world is increasing, with climate change, pandemics, and political risks leading the way. There are other reasons, too: Recruiting the best talent in rare skill areas (like AI expertise) requires competitive positioning, including anywhere work. In the future, devise a strategy that proactively determines which roles will work remotely, what technologies are needed to empower them, and how everyone can feel like an equal participant no matter where they are.
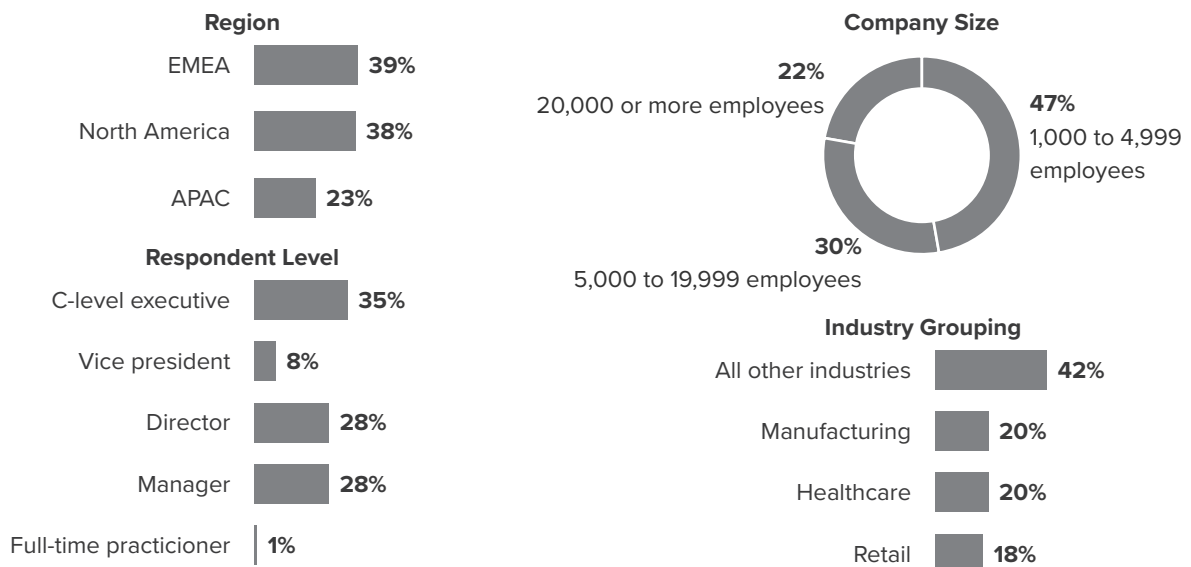
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Appendix A: Methodology

In this study, Forrester conducted surveys of two audiences to evaluate the evolving needs of technology employees and the ways decision makers are planning to meet these needs. The first audience included 969 enterprise technology decision makers who oversee workforce devices and cloud applications (382 in Europe). Respondents were decision makers in IT and business roles who are responsible for making or influencing decisions related to devices and applications that their employees use for work and collaboration. The second audience included 1,356 global enterprise information workers who use cloud applications for work at least weekly (496 in Europe).

Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in December 2019 and was completed in January 2020.
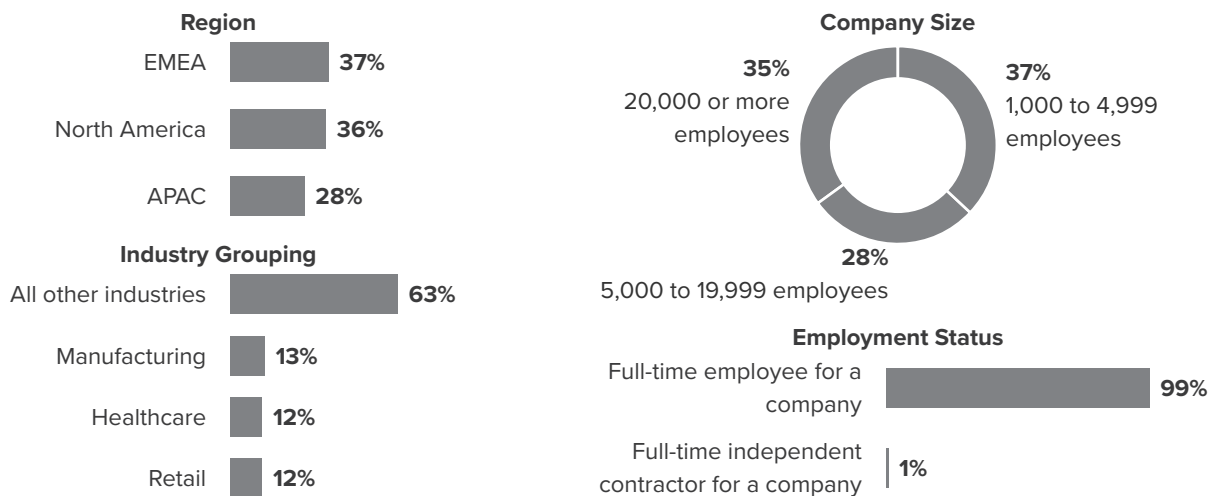
Appendix B: Demographics/Data

DECISION MAKERS

Region
- EMEA **39%**
- North America **38%**
- APAC **23%**

Company Size
- **22%** 20,000 or more employees
- **47%** 1,000 to 4,999 employees
- **30%** 5,000 to 19,999 employees

Respondent Level
- C-level executive **35%**
- Vice president **8%**
- Director **28%**
- Manager **28%**
- Full-time practicioner **1%**

Industry Grouping
- All other industries **42%**
- Manufacturing **20%**
- Healthcare **20%**
- Retail **18%**

Base: 969 Enterprise technology decision makers who oversee workforce devices and cloud applications
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020

WORKERS

Region
- EMEA **37%**
- North America **36%**
- APAC **28%**

Company Size
- **35%** 20,000 or more employees
- **37%** 1,000 to 4,999 employees
- **28%** 5,000 to 19,999 employees

Industry Grouping
- All other industries **63%**
- Manufacturing **13%**
- Healthcare **12%**
- Retail **12%**

Employment Status
- Full-time employee for a company **99%**
- Full-time independent contractor for a company **1%**

Base: 1,356 global enterprise information workers who use cloud applications at least weekly for work.
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020

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Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

"The Employee Experience Bill Of Rights In The Era Of AI And Automation," Forrester Research, Inc., December 5, 2019.

"Predictions 2020: Employee Experience," Forrester Research, Inc., October 31, 2019.

Appendix D: Endnotes

[1] Source: "The State Of Remote Work, 2020," Forrester Research, Inc., July 6, 2020.

[2] Source: "The Real Value of Work," Forrester Research, Inc., September 23, 2020.

[3] Source: Forrester Analytics Business Technographics® Priorities And Journey COVID-19 Recontact Survey, 2020.

To read the full results of this study, please refer to the Thought Leadership Paper commissioned by Google titled "Cloud Workers Are Key To Disruption Preparedness"

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