

A Forrester Consulting  
Thought Leadership Spotlight  
Commissioned By Google  
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# Cloud Workers Are Key To Disruption Preparedness: A Spotlight On The UK

UK Results From The May 2020 Thought  
Leadership Study, “Cloud Workers Are Key To  
Disruption Preparedness”





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.



70% of UK IT decision-makers agreed that giving workers access to business applications anytime, anyplace, and from any device is now business-critical.

## Introduction

In a world of increasing uncertainty and disruptive events, leveraging the benefits of cloud technologies and end points is more crucial than ever before. When the global pandemic hit in early 2020, enterprises around the world faced the reality that remote work is not the future of work; it is the present. Firms that can support their workers anytime and anywhere 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 (110 in the UK) and 1,356 global information workers (165 in the UK). 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 do their jobs anytime, anywhere, and on any device — now make up more than one in four UK workers. We found that IT enterprises in the UK prioritise employee and customer experience (CX) in today’s remote working environment. Though cloud adoption is rampant in the UK, a continued commitment to investing in the cloud workforce is necessary to ensure customer value and resiliency. In today’s remote working environment, supporting a cloud workforce is not a luxury; it is a necessity for firms navigating through disruptive environments.

### KEY FINDINGS

- › **Information workers move to the cloud.** In the UK, 45% of information workers are cloud workers who use a device for work and who use cloud apps and browsers vigorously. This slightly outpaces the number of cloud workers in Europe (40%). In general, all information workers are starting to aspire to work more like cloud workers. During a typical day, cloud workers in the UK spend the majority of their time (60%, which is on par with 58% in Europe) using a device and completing tasks on a web browser. Information workers are tracking in the same direction (50%).
- › **Enterprises are focused on EX, and cloud-based apps deliver.** As the workforce becomes increasingly remote, IT organisations value and prioritise EX. IT decision-makers in the UK said investing in technology that improves employee productivity (76%) and technology that improves EX (74%) is a high or critical priority over the next year, which is above the average in Europe. They plan to expand their already high usage of cloud-based solutions to deliver those experiences.
- › **Enterprises turn to the cloud to enable their workforces to face disruption head-on.** Seventy percent of UK IT decision-makers agreed that giving workers access to business applications anytime, anyplace, and from any device is now business-critical. Equipping workers with cloud-based technology not only enhances their experience and productivity, but it also leads to resiliency and customer value in the face of disruption. IT decision-makers in the UK can leverage cloud-based strategies to drive resiliency by investing in technologies that improve customer experience (78%), endpoint security (76%), and browser security (43%).

# 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 the UK and around the globe. Remote work is now essential for business continuity and employee retention.<sup>1</sup> 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 by — equipping them with cloud-based tools to work with flexibility and agility — anytime, anywhere.

Both in the UK and globally, cloud workers are commanding a larger presence in the workforce, and cloud usage is only increasing. In surveying both information workers and IT decision-makers globally and 110 IT decision-makers and 165 information workers in the UK, Forrester found that:

- > **Information workers are becoming cloud workers.** In the UK, 45% of information workers are cloud workers, higher than the number of cloud workers in Europe (40%) (see Figure 1). Not only do cloud workers make up a sizeable chunk of the workforce, but Forrester's study shows how information workers are working more like cloud workers. During a typical day, cloud workers in the UK spend the majority of their time (60%) on a device completing tasks on a web browser or attending virtual meetings (see Figure 2).

Figure 1



45% of information workers in the UK are cloud workers.

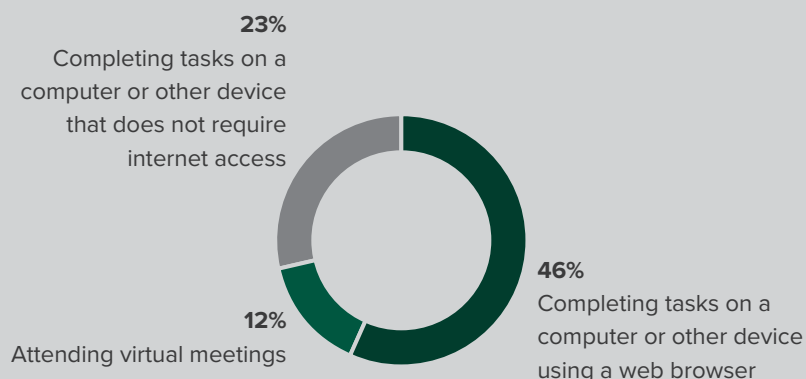
### Cloud workers:

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: 165 UK 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 percentage.)



Base: 165 UK enterprise information workers  
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020



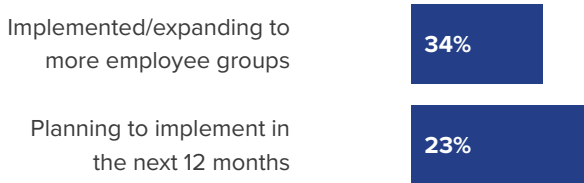
Cloud workers in the UK spend 60% of their device time in a browser or virtual meetings.

› **The UK leads in cloud-native device usage and the lead is only growing.**

Looking at the UK in particular, IT decision-makers are ready and willing to empower their workforce with cloud-based tools they want and need. Three in four UK enterprises are set to expand their use of cloud-based applications for employees over the next year (75%), and that outpaces Europe (67%). In addition, cloud-native device usage is expanding where more than half (56%) of IT organisations have either implemented or plan to implement cloud-based computers for their workforce in the next 12 months. To that end, Forrester found that nearly half of the information workforce in the UK (47%) use cloud-native computers. This is a 15 point lead over Europe as a whole (33%) (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?”**



Base: 110 UK 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

**ENTERPRISES ARE FOCUSED ON EMPLOYEE AND CUSTOMER 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 it also improves creativity.<sup>2</sup> In other words, happy employees make happy customers. Decision-makers in the UK are focused on delivering good experiences on both fronts.

As the workforce becomes increasingly remote, IT organisations value and prioritise productivity and employee experience. The top priorities for UK enterprises this year include investing in technologies that improve the customer experience (78%), improve employee productivity (76%), improve employee experience (74%), and better support employee mobility/flexibility of work locations (70%).

A cloud-first strategy addresses strategic priorities and the needs and preferences of information workers. Information workers in the UK depend on universal access: Nearly seven in 10 (67%) of UK 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 value the ability to collaborate in real time on documents and files. The majority (66%) like being able to do work on any device simply by going to their browser (see Figure 4).

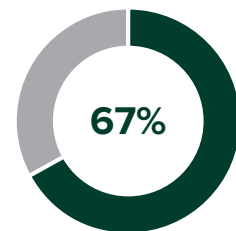


On average, information workers who use cloud-native computers:

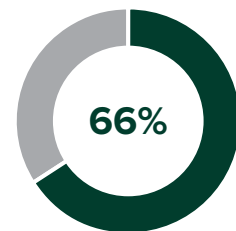
**UK: 47%**

**Europe: 33%**

**Figure 4: Information Worker Device Needs And Preferences**



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



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

Base: 165 UK enterprise information workers  
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2020

# Enterprises Turn To The Cloud To Enable Their Workforces To Face Disruption Head-On

IT decision-makers realise elevating their customer experience starts with empowering their employee experience. They are migrating and building out cloud strategies to enable their workforces to work with more autonomy and flexibility and they're facing disruptive events head-on. In times of uncertainty and disruption, firms that can support employee productivity with secure, cloud-based, end user computing are best positioned to drive EX, productivity, customer value, and resiliency. IT decision-makers in the UK are:

› **Focusing on cloud migration.** Public cloud usage is rampant in the UK. Nearly all (93%) of the respondents with UK enterprises either have a cloud-first strategy or are prioritising cloud. That includes more than half (55%) who have a cloud-first strategy today and use cloud solutions to support most or all of their business needs. By the end of 2021, 35% of end-user applications are expected to run on the public cloud, according to Forrester's pre-pandemic snapshot. In addition, 75% of UK IT decision-makers indicated their organisations will aim to provide all employees with cloud-based access to business applications. Looking forward, nearly nine in 10 (89%) enterprises adopt a cloud-first architecture when making new technology implementations.

› **Addressing challenges to better realise 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. It is striking that nearly all surveyed UK decision-makers (94%) agreed that although their organisations successfully migrated some key applications to the cloud, more work remains to be done.

The top challenges to workforce productivity that IT decision-makers in the UK pointed out are security-related concerns. These include concerns about potential theft/loss (41%), concerns about security of older systems (38%), and concerns about updates to software and security patches (37%). Ensuring security is vital for enterprises and their cloud workers. Eighty-three percent of UK employees prioritise security features to prevent the misuse of company data (83%) and personal data (80%).

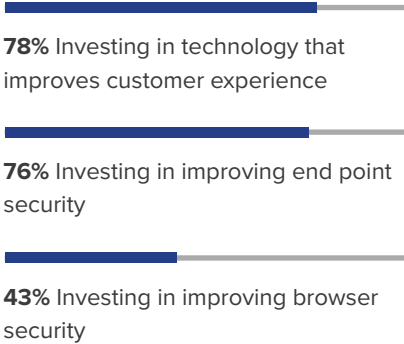
› **Unlocking cloud benefits to ensure crisis readiness.** Seventy percent of IT decision-makers agree that giving workers access to business applications anytime, anyplace, and from any device is now business-critical. Enterprises in the UK must continue their commitment to empowering their employees with cloud-first solutions and doing so safely.

IT decision-makers must leverage cloud-based strategies to drive resiliency by prioritising initiatives that deliver on customer value while addressing security head-on. These include investments in technology that improve customer experience and investments that improve endpoint and browser security (see Figure 5).

93% of UK enterprises either have a cloud-first strategy or are prioritising cloud to support their business needs.

Figure 5

### IT Initiative Priorities ("High" and "Critical")



Base: 110 UK 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

# Key Recommendations

Enterprises in the UK are moving toward a model of cloud work. UK employees already outpace continental Europeans, with 45% of information workers in the UK reaching cloud worker status compared to 40% in Europe. These employees take a browser-centric, highly connected approach to their workday. A strong majority of other UK information workers aspire to solve 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 UK employees and IT decision-makers about cloud work yielded several important recommendations:



**Use cloud to address key employee needs.** The UK's 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. Local challenges — like adapting business to post-Brexit trade policies — will also drive a need for flexibility and cost savings. Migrating information workers' technology stacks to the cloud will solve both their current and future needs.



**Analyse 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 overwhelmingly desire the convenience of accessing applications and files from any device.



**Build in IT fundamentals alongside EX.** In the past, decision-makers saw EX and IT as being at odds. Now, UK 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 organisations will move to some kind of hybrid model.<sup>3</sup> 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. And London's high-priced real estate market can't accommodate every employee. 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.

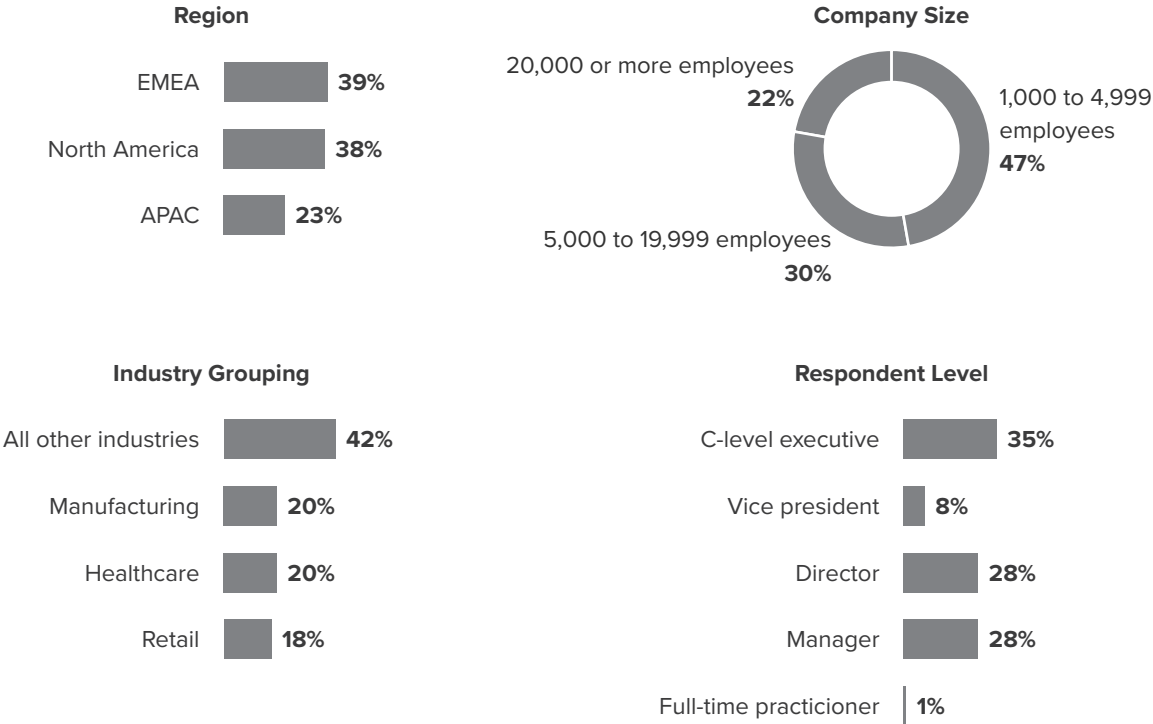
# Appendix A: Methodology

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 and 110 in the UK). Respondents are decision-makers in IT and those who are responsible for making or influencing decisions related to devices and applications that their organisation’s 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 and 165 in the UK).

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.

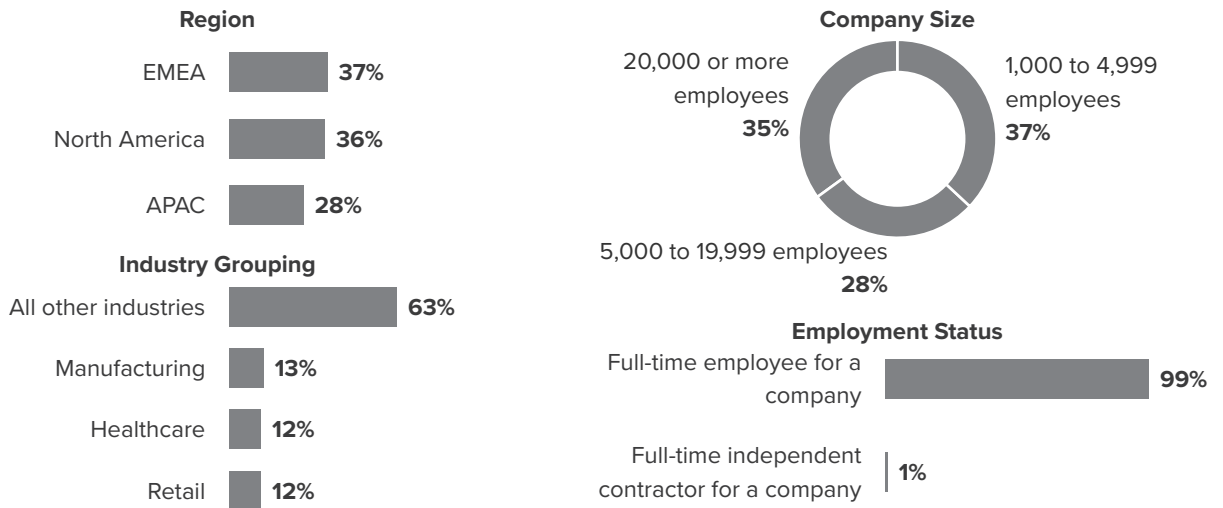
# Appendix B: Demographics/Data

## DECISION MAKERS



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



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

## Appendix C: Supplemental Material

### RELATED FORRESTER RESEARCH

“The Real Value Of Work,” Forrester Research Inc., September 23, 2020.

“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

<sup>1</sup> Source: “The State Of Remote Work, 2020,” Forrester Research, Inc., July 6, 2020.

<sup>2</sup> Source: “The Real Value Of Work,” Forrester Research, Inc., September 23, 2020.

<sup>3</sup> 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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