HOW TECH FIRMS CAN JUMP AHEAD OF COMPETITORS IN A HYBRID WORLD

An Ipsos Point of View
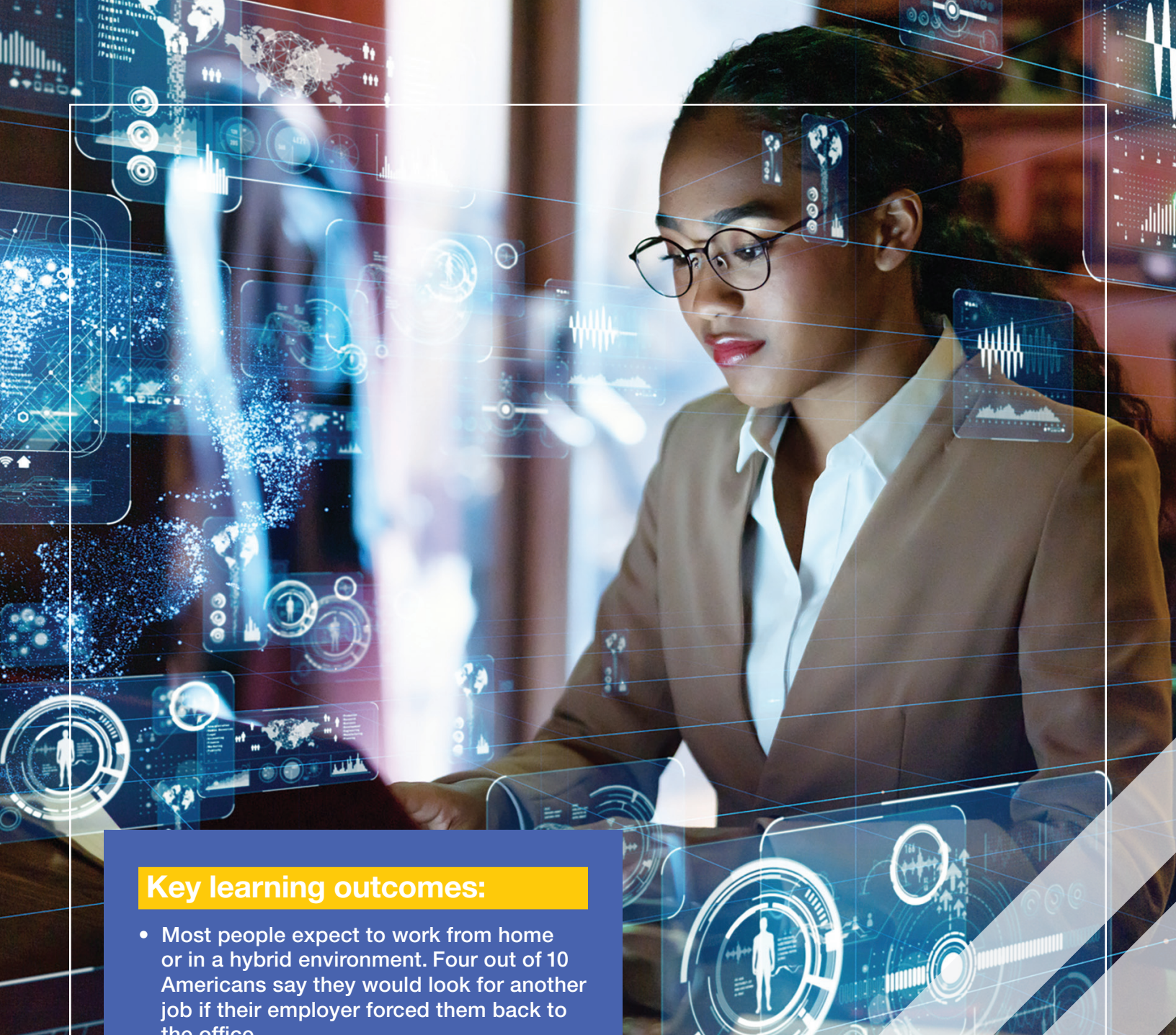
By Emmanuel Probst

Ipsos

Key learning outcomes:

- Most people expect to work from home or in a hybrid environment. Four out of 10 Americans say they would look for another job if their employer forced them back to the office.

- Remote working will foster a more diverse workforce as companies hire talents from a wider range of locales.

- On the flip side, workers feel increasingly lonely and isolated, prompting the need for products that support well-being and foster social connectedness.

- The office of the future needs technologies to work better together, whenever, perform health screenings and facilitate contactless access.

A year into the global pandemic upending the way we work, many tech companies have jumped ahead of other firms in changing their offerings to employees. These moves—appealing to a workforce that now wants flexibility—are more important than ever in retaining and recruiting the best talent in a hypercompetitive landscape.

Here's what brands should know about how their current employees—and the employees they may want to recruit—are feeling.

Generational differences

Recent Ipsos research shows that 40% of people currently working from home want to get back to the office. That said, 42% would look for another job if their employer forced them back to the office, and 72% want flexible time in the office.

Our research also shows that 63% of participants say a hybrid work setting will improve their work/life balance, 62% say it will improve their well-being, 57% say it will improve their physical health and 54% say it will increase productivity.

Millennials and Gen X are more likely than Gen Z and Boomers to have shifted to working from home, and are more appreciative of the flexibility it offers. We expect these younger generations to be more likely to seek flexibility from their current and future employers. Still, across generations, more than 80% of workers expect their employer to support a more flexible work situation in the future.
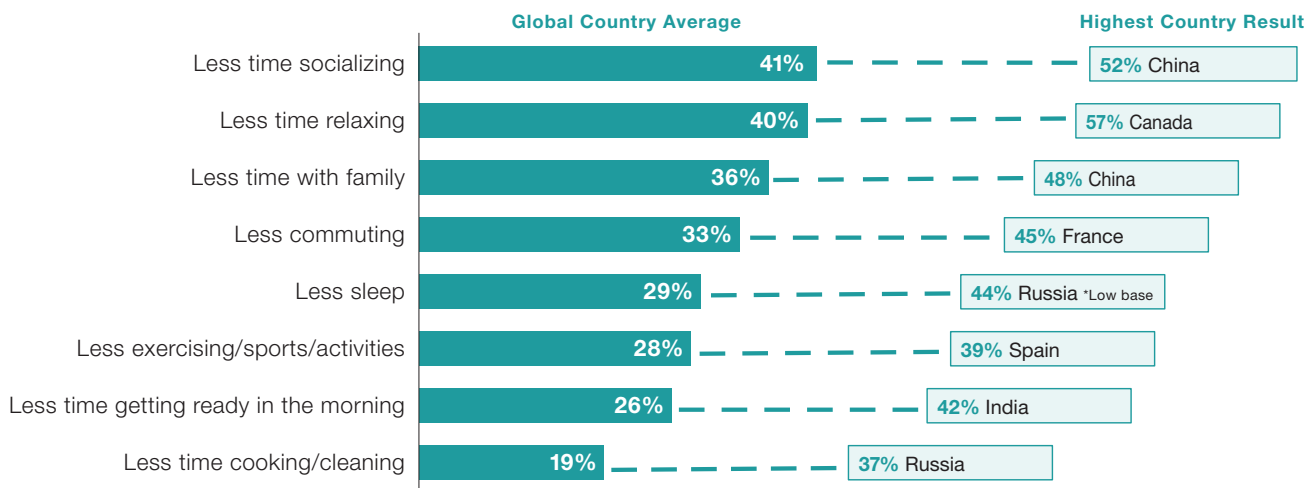
How much are people working?

Knowledge workers, younger generations, parents and those working from home report working more hours than they were before COVID-19 at the expense of personal time. Interestingly (and perhaps alarmingly), working from home facilitates (rather than impedes) all dimensions below except socializing and commuting.

Sources of More Work Hours

The growth in work hours is primarily at the expense of personal time
(social, relax and family), raising questions about its sustainability

	Global Country Average	Highest Country Result
Less time socializing	41%	52% China
Less time relaxing	40%	57% Canada
Less time with family	36%	48% China
Less commuting	33%	45% France
Less sleep	29%	44% Russia *Low base
Less exercising/sports/activities	28%	39% Spain
Less time getting ready in the morning	26%	42% India
Less time cooking/cleaning	19%	37% Russia

"The Global Country Average" reflects the average result for all the countries where the survey was conducted.
It has not been adjusted to the population size of each country and is not intended to suggest a total result.
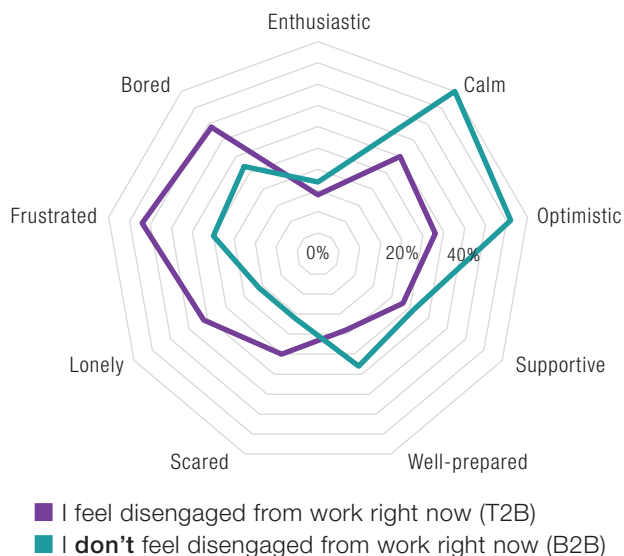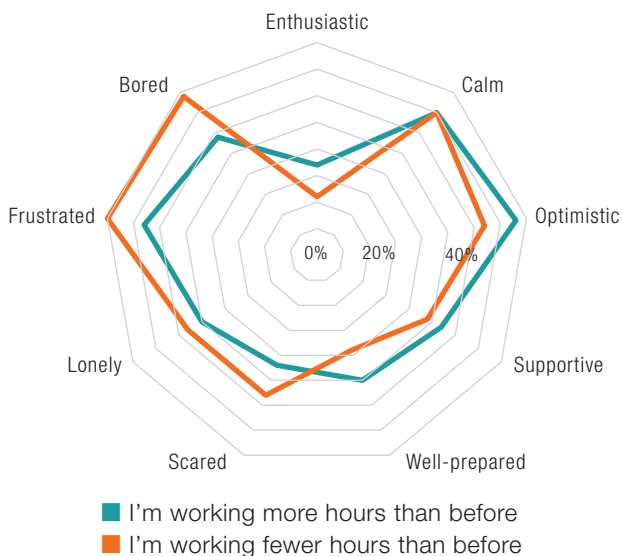Q: You said that you are working more hours than before. Where have the extra hours you've spent working come from?
Base: Working more hours than before: 2016

With fewer distractions and less socializing, meaningful work becomes more important to mental well-being. Those who feel like they have engaging jobs report feeling more optimistic, supportive and well-prepared.

Censydiam Emotions—State of Mind "Right Now"**

Left chart legend:
- ■ I'm working more hours than before
- ■ I'm working fewer hours than before

Q: Are you working more, the same or fewer hours per week, on average, than you were before the pandemic started?
Base: Working more hours: 2016: Working fewer hours: 1879

Right chart legend:
- ■ I feel disengaged from work right now (T2B)
- ■ I **don't** feel disengaged from work right now (B2B)

Note: Levels of disengagement are the same regardless of work situation (i.e. Working from home, in the office, etc.)

Q: Which of these describe your state of mind right now? Please select at least 3 and up to a maximum of 8 responses.
Base: Disengaged 2830. Not Engaged 4246.

With less happening outside of work, having an engaging job becomes more important and leads to a much more positive outlook.

Office amenities

The office of the future will be different in many ways from the one we left as the pandemic began. First, many companies will downsize their real estate footprint and open satellite offices. Rather than just coming to work at a desk, the office will be a place to socialize, collaborate and innovate. When asked about going back to the office, people say they want benefits they cannot easily enjoy at home.

Benefits people seek when considering going back to the office

- **53%** training and career development sessions
- **50%** well-being and support
- **46%** workplace amenities
- **44%** workshops and ideation
- **39%** employee social gatherings

These expectations from employees will prompt companies to invest in new technologies. For example, analytics from spatial intelligence platforms and sensors can help management teams understand how employees use the space to make thoughtful design decisions. Further, health screenings and verification using contactless wellness checks will become common in office lobbies. PopID, a wall-mounted thermal imaging camera that uses facial recognition, has been deployed in Subway and Taco Bell franchises, as well as assisted living facilities, to measure employee temperatures.

While these new technologies are helpful and compelling, it will be crucial for brands to commit to data privacy and security. Indeed, the office of the future by necessity will lead to employers collecting more information about their workers. Some of this information, like employees' health, is by nature very personal.
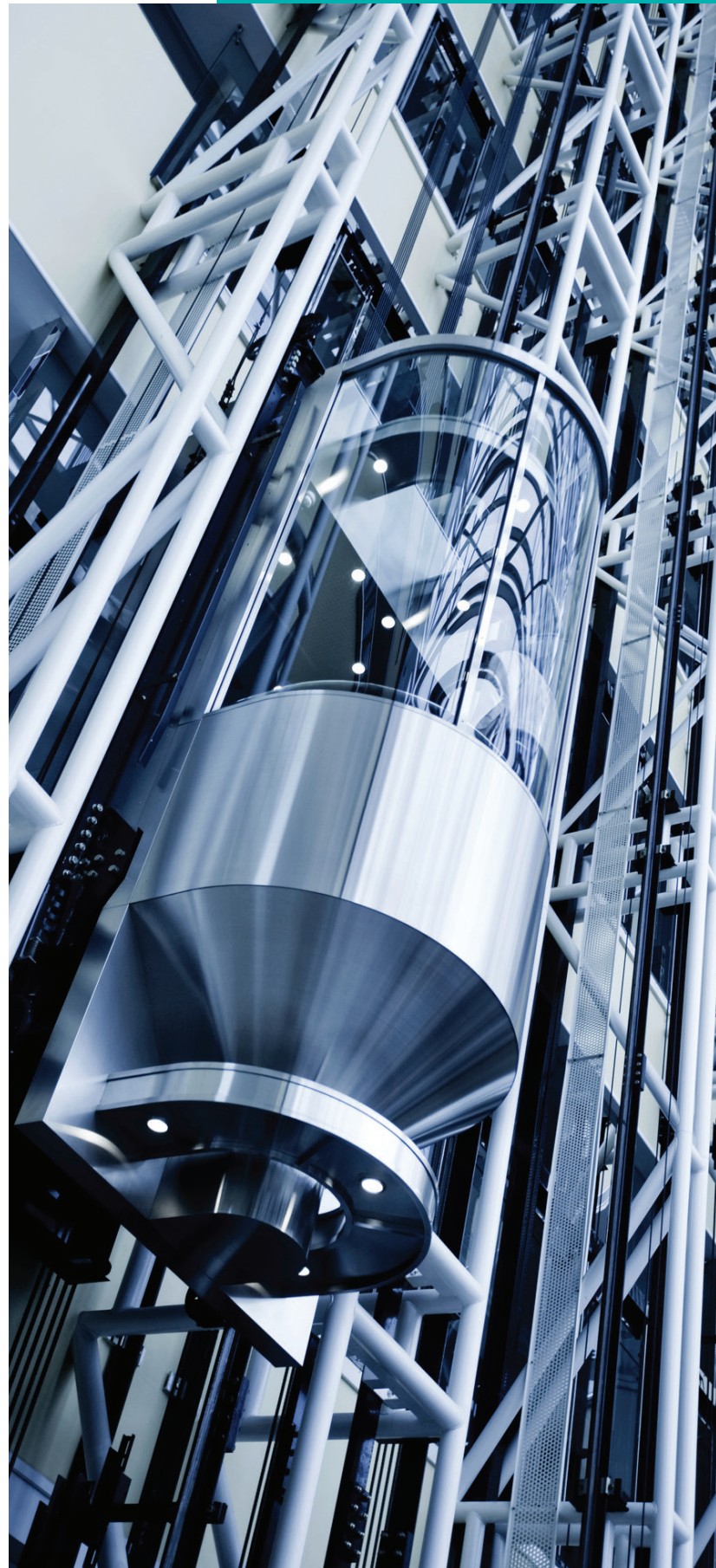
Diversity and inclusion

Diversity and inclusion have become increasingly important in our society. Six out of 10 Americans report that a diverse and inclusive workplace is a factor when choosing an employer, according to Ipsos research. Further, almost half of Americans believe that remote work will provide better opportunities for companies to hire a more diverse workforce.

Many (if not most) companies, struggle to represent minorities. And diversity recruiter Joonko is providing HR professionals with a technology to attract, source and pre-vet underrepresented talents.

Education

The pandemic has also changed for good how we acquire new skills, from kindergarten to graduate and continuing education. The future of education will rely on hybrid online/at-home learning, as 85 percent of teachers and 74 percent of parents expect online learning to be part of classroom instruction when students return to campus.[1]

Among all the tools available, YouTube is the platform of choice for learning. A recent Ipsos study reveals that six in 10 participants choose YouTube as their online learning source. Along with this, 56 percent of people rely on tech brands to provide better learning tools and platforms post-pandemic.

Companies should be aware of options for working parents when it comes to education and learning at home.

• Floreo is an early-stage startup that helps students with autism expand their social and communication skills.

• zSpace has created an AR/VR-enabled tablet that schools use to teach K-12 students electricity, circuits, the periodic table, and geometry, and many other concepts.

For employees working from home who want to make sure their children have resources, adaptive learning technologies can support students with online tutors driven by Artificial Intelligence. These online tutors can assess a student's strengths and weaknesses and deliver personalized individual instruction. They also provide immediate feedback through autograding, which instantly correct problems and even essays.

UC Berkeley has started implementing adaptive learning technologies that automatically generate personalized help on the fly, based on AI learnings from past student interactions with the course.[2] Other examples of adaptive tutors include Mastering Physics and MATHia, for geometry and algebra.

[1] https://cdt.org/insights/research-report-with-increased-edtech-comes-increased-responsibility/

[2] https://news.berkeley.edu/2020/05/27/the-pandemic-could-open-a-door-to-new-technology-and-dramatic-innovation-in-education/

Privacy and security

While the pandemic prompted us to learn and adopt compelling technologies, it also raised our concerns around keeping our personal data safe and secure. Recent Ipsos research reveals that 66% of people are now more concerned about privacy and security, although 57% feel they have a better understanding of how to protect themselves than before the pandemic. Noticeably, 88% of people feel they are personally responsible for educating themselves about privacy, and 78% think technology companies must educate them.

This concern for security expands to the class-room. Despite the increase in "Zoombombing" and cybersecurity attacks during the pandemic, CDT's research revealed that three in four teachers have not been trained on keeping students safe from these online threats.

Societal and mental health implications

Because of the pandemic, feelings of social isola-tion are on the rise, hitting older teens and young adults especially hard. The Harvard Gazette reports that 36% of young people say they felt lonely "frequently" or "almost all the time or all the time" in the past four weeks, compared with 25 percent who recalled experiencing serious issues in the two months prior to the pandemic. Perhaps most striking is that 61% of those aged 18 to 25 reported high levels of loneliness.[3] Furthermore, data from the Centers for Disease Control and Prevention show that 63 percent of young people reported experiencing substantial symptoms of anxiety and depression.[4]

Ipsos research finds that tech brands can help combat loneliness and isolation. More than half of participants believe tech brands can be helpful in managing their health, explore new ideas and places and connect with their team and with their community.

Helpfulness of tech brands' actions post pandemic
Extremely Helpful / Helpful (T2B)

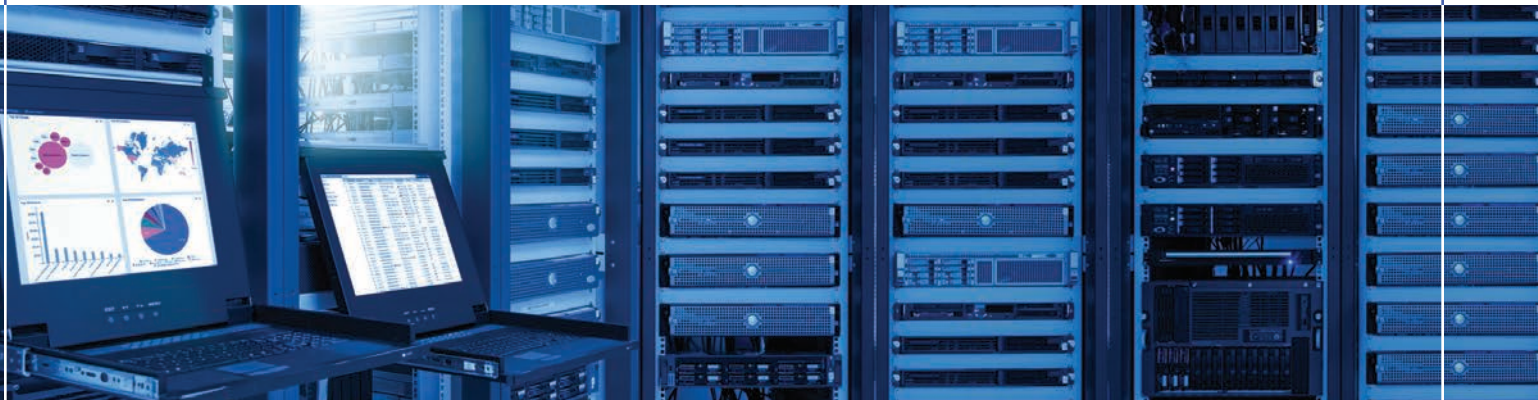| 54%	54%	54%	52%
Tool and services that help manage **health**	Products and services that inspire to explore **new places and ideas**	Products and services that help users feel **connected to their team**	Products and services that help users feel **connected to their community**

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[3] https://news.harvard.edu/gazette/story/2021/02/young-adults-teens-loneliness-mental-health-coronavirus-covid-pandemic/

[4] https://www.cdc.gov/mmwr/volumes/69/wr/mm6932a1.htm?s_cid=mm6932a1_w

What tech firms should do next

Our future work and learning environments present tech brands with a wide range of opportunities to create new products or reposition existing ones.

- In Education, tech brands could educate teachers, parents and students about privacy and security.

- In mental health, tech brands should develop products and marketing messaging around their ability to combat isolation by connecting people with others.

In our post-pandemic lives, technology will play a role that is even more predominant than it does today. For tech brands, the key to success will be helping users in important moments as well as in their everyday lives.

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