

The Evolving Workforce

Report #2: The Workforce Perspective

Canada





Canada Insights

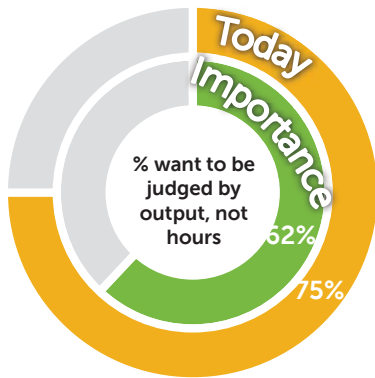
Executive Summary

Shifts in technology are changing the way Canadians of all ages work, making problem solving easier and increasing productivity. This is true across all types of workers and sectors, whether public or private, within SMBs or large enterprises. There is less evidence of differences or conflicts between generations than might be assumed, although older generations are more aware of the benefits that changes have brought than generations who have only known modern ways of working.

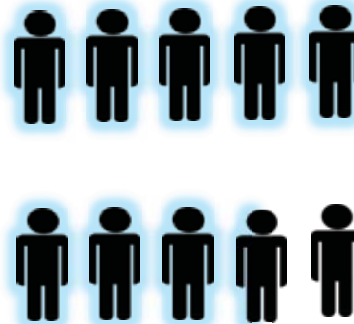
Canadians increasingly want to be judged on what they produce, not the hours that they work - the concept of the 9-5 job is decreasing in relevance. A range of different devices are likely to continue to be required for work and a majority of Canadians would prefer this to one device that would meet all their needs. There is also an understanding of increasing blurring of professional and personal lives.

These changes bring challenges with them. As it becomes easier to distribute tasks, so job insecurity is expected to increase. Canadians will find it harder to switch off when they are not working and more people are reporting they have more to do in a day than they are able to manage. Monitoring of employees is expected to increase and this could erode employees trust, also posing potential problems.

62% of Canadian workers want to be judged on output, not hours in the office and this is already happening for **75%** of workers today



84% of Canadians agree that the internet and technology is creating opportunities for organizations to do business in different ways



This is particularly prevalent in public education

41% of Canadian workers highlight IT problems as a frustration of their daily working life

Magnitude of threats perceived by Canadian workers

Working life encroaches on private life
Under pressure to work longer hours

Difficult switching off after work

IT frustrations

Trend #1: Crowdsourcing and Crowdsourcing service



Hypothesis

The workforce of the future, for many industries, could be thousands of people working in different places. Is cloud computing and other ICT applications going to make it easier to distribute more tasks and services and to invite input from a community through crowdsourcing?

Top insights

84% of Canadians agree that the Internet and technology is creating opportunities for organizations to do business in different ways. This figure is remarkably consistent across sectors, although it is particularly prevalent in public education (95%). Awareness is higher (90%) among older employees (55-64) who have experienced a working world pre Internet, compared with a younger age group (70% of 18-24s) who have known very little else.

83% of employees today also believe that technological advances are allowing them to get things done more productively. This is especially true of the financial sector where 94% believe this describes their situation today and 92% expect it to hold true 10 years from now.

Three quarters of Canadian employees feel that Internet and technological advances are providing them with the opportunity to make bigger contributions to their organization.

The potential downside to the advances that technological developments bring is a sense of insecurity. Around a quarter of employees (23%) perceive outsourcing to be a threat to their role - increasing to 28% ten years from now. The concern is much greater for those working in large enterprises (29%) than SMB workers (16%).

Implications

The potential for IT and technology to help realize the benefits of crowdsourcing – bringing together resources and people in new and productive ways – is already well recognized in Canada. It is interesting to note that it is among older workers where excitement is strongest, whereas younger ones are more likely to take it for granted. The imperative for employers, and a potential opportunity for the IT industry, is to leverage this excitement while assuaging any concerns about job security.

Trend #2: Productivity measured in outputs, not hours

Hypothesis

Standardized measures of productivity based on numbers of hours inputted would become less relevant in a knowledge-based economy. What are going to be the newer, softer metrics to assess productivity?

Top insights

Approximately two thirds (62%) of Canadians agree that they want their productivity to be measured by the quality of their outputs rather than the time spent at work, something that is already happening for around three quarters of workers. Measurement on quality of output is particularly high in the financial sector (86%). In contrast, only 21% of the Canadian workforce believes it is important that productivity is measured by time in the office, while 39% believe their productivity is currently measured in this way.

Although flexibility is desired and prevalent within the Canadian workplace, it does come at a price. 43% of Canadian workers find it difficult to switch off from work when they should be relaxing. The industries where this is most prevalent are public education (55%) and healthcare (57%). Moreover, new working methods may be placing increased strain on the workforce as 48% of employees believe they have too much work to complete in one day.

Implications

Moves to 'softer' measures of productivity and away from monitoring input are well underway and welcomed by most Canadians. However, flexibility in working practices may be placing a strain on employees. While technology is often considered to be a root cause of this trend – is there an opportunity for the IT industry to challenge this perception, by promoting how technology could help improve work-life balance rather than aggravate it?

Trend #3: Changes in the adoption of devices



Hypothesis

The number and types of devices are proliferating and changing. Choice of device would become more about the situation, location and occasion. Are employers and the current systems and processes going to allow for increased end-user utility and choice?

Top insights

Currently, less than one in three (31%) Canadian employees have the option to choose the type of computer and / or technology their employer provides. In the future, however, this is expected to increase to 43% of all employees. Presently, the chance to choose the type of technology is much more common in the private (36%) than public sector (20%) and with SMB workers (40%) than those in large enterprises (27%).

46% of private sector workers desire a computer and / or other devices which can be used for both personal and work use, although 59% of all employees believe this already describes their situation today. More than two thirds of Canadians believe this will describe their situation in ten years time, but it is a view held more by those at the start of their careers (70% of 18-34s) than those with substantial experience (57% of 45 – 64s).

Interestingly, interoperability between devices is more important (40%) than having a single technology device to meet all work needs (36%). This is unsurprising when set alongside the fact that over half (56%) of Canadian employees already have different devices available for work and 71% believe this will represent their situation in ten years.

Implications

The lines between personal and professional are likely to become increasingly blurred, with workers using the same devices for both aspects of their life. However, with Canadian workers already accustomed to managing multiple devices in their work and personal lives, the number of different devices is expected to proliferate and IT departments and vendors need to address an increasing need for interoperability.

Trend #4: Intergenerational kiss and punch

Hypothesis

There will be more intergenerational knowledge transfer between younger 'digital natives' and the older generation. However, is there an increased risk of conflict and tension between workers of different ages, backgrounds, knowledge and skills?

Top insights

The pressure of needing to keep up with technology at work is felt nearly equally among all age groups. 18-24 year olds (43%) are nearly as likely to believe that this is prevalent as those aged 55-64 (49%). This age group is, however, more likely to believe that those who are comfortable with the latest technology are at an advantage in the workplace than those aged 18-24 – 82% versus 60% respectively.

However, this is not necessarily indicative of a generational conflict when it comes to technology in the workplace, this does suggest that older people who will remember a less technologically-dominated working world are more aware of the transformational power of technology in the workplace. By contrast, younger 'digital natives' are more likely to take technology for granted.

Organizations which offer good technology appeal to all age groups. 35-44 year olds (75%) are most attracted to companies with good IT, though 18-24 and 45-54 year olds are not far behind at 70% each.

Implications

There are no real signs of any tensions emerging between workers of different ages in Canada. Rather than worry about the risk of conflict or tension among workers of different ages or technical abilities, companies who wish to attract the best talent must make sure that they are able to offer good technology to help Canadians do their jobs.

Hypothesis

It would become easier to tell what employees are doing, but harder to tell them what to do. In this scenario, would employers use pervasive technology to oversee their workforces at any given time? And if so, would distrust accelerate?

Top insights

Trust is highly valued by the Canadian workforce. 70% of workers want to be trusted to use company resources responsibly, something that is particularly apparent in large enterprises (79%) when compared with SMBs (65%). Nine in ten employees say that this describes their situation today, similar for both SMBs (90%) and those working in large enterprises (87%).

While large numbers of those surveyed do feel trusted, a significant proportion already believes they are having their work monitored. Around a third of Canadian employees (30%) believe their email is monitored and around four out of ten (39%) believe their employer monitors their time during the day. This perception is more prevalent among Large Enterprise than SMB workers – 38% believe e-mail is being monitored versus 22%, and 47% believe their employer monitors their time versus 35% in SMB.

Half of the Canadian workforce claims it is important to be motivated by their company's values and 72% of employees believe this is true today. Particularly for those in the public sector, describing 80% of those in healthcare and 79% in public sector education aligning with company values.

Implications

The importance of values is universally agreed and by and large workers and employers in Canada enjoy a relationship of trust. While employee monitoring is not uncommon, fortunately, there appears to be little correlation between monitoring and levels of trust. However, employers would be well advised to not take this for granted, and the IT industry is advised to be mindful that some of their products and services are seen by employees to be undesirable or not quite able to support their jobs.

Trend #6: Many hats of the IT manager

Hypothesis

As employee aspirations change to a greater onus on happiness, autonomy and choice, workplace IT would be one way of recruiting and retaining staff. Would the job of the IT manager increasingly resemble that of other functions, like the HR manager?

Top insights

Corporate technology provision is clearly an influencing factor in choosing an employer in Canada, as 70% of employees admit they are attracted to work for an organization that offers the latest technology. This is more of an influencing factor for men (78%) than women (63%), but not something that varies significantly over different age groups. This importance will increase over time, with over three quarters of employees (76%) saying this will describe their situation in ten years.

Encouragingly for Canadian employers, three out of four employees (74%) believe that their employer provides them with good hardware and software. This is particularly true in the financial sector with 81% in agreement.

Despite this broadly positive outlook, 41% of Canadian workers highlight IT problems as a frustration of their daily working life. Encouragingly, IT problems are expected to become somewhat less of an issue moving forward, with 35% believing they will continue to experience problems in the future.

Implications

This hypothesis is clearly validated through the findings of this latest research, which clearly establishes the connection between IT provision and employee morale. Canadians are generally happy with how their employers meet their IT needs and expect this to remain the case. Continuing to meet expectations and provide good hardware and software will help IT managers play an integral role in their organizations and assist in maintaining positive morale.

Hypothesis

The business software of the future will be adopted and designed by employees rather than management or the IT department. Are we going to see more networked, de-centralized organizations to facilitate this shift in corporate hierarchy?

Two thirds of the Canadian workforce want the freedom to choose how best to complete their work – something which is particularly important for those in public education (79%) and the finance industry (78%). Over three quarters of employees (76%) feel that they have this privilege in their current working situation. Along the same lines, 60% feel the ability to access the Internet how and when workers want at work is important.

Top insights

The need to keep up with the latest technology is an issue in the Canadian workplace today as 47% believe that this is required to be effective at work. Interestingly, this seems to be more of an issue for males (53%) than it is for females (42%) and particularly among those in large enterprises (60%). Moreover, this is expected to be of even greater relevance in the future with 57% of Canadians feeling this will be the case in 10 years.

Implications

Employees want the freedom to choose how to best complete their work and keeping up with the latest technology will be increasingly important. Companies will need to adapt to make sure they can meet these needs, but Canada does not appear to be facing an overwhelming shift in corporate hierarchies.