



India

Though workplace perceptions and behaviors are rooted in tradition, employees in India are eager to embrace the latest technology and lead more contemporary work lives.

Most Indian employees still use desktops, say they are more productive when working from an office, and look to the office to foster collaboration and career development.

However, many Indian employees, especially executives, use and prefer mobile and touchscreen technology for work. Furthermore, technology plays a key role in keeping existing talent and attracting new talent. Nearly all of the Indian workforce consider it important to have the latest technology.

Frustration abounds though, with a consensus that Indian organizations only deploy new technology when absolutely necessary, available technology holds employees back and technology is hindering career growth.

Companies who don't invest in updated technology not only risk a loss of productivity, they also put themselves at a disadvantage for attracting, motivating, and retaining the talent needed to promote growth now and in the future.



One Size Doesn't Fit All

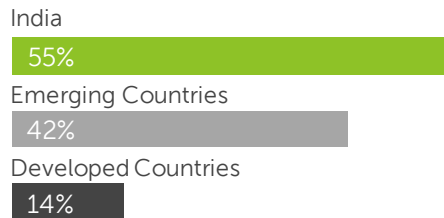


The desktop is the top device for getting work done in the office in India, as it is globally. Eight-in-ten employees use it for work, however, preference for desktops is low (48%).

Though the desktop is still widely used by executives, executives are far more likely than those in other roles to utilize portable technology including laptops (72%), tablets (41%) and 2-in-1s (29%). And we see multiple devices being used by most everyone.

Touchscreen usage for work is high (driven by executives), as is the desire to use touchscreens (38% among those not currently using).

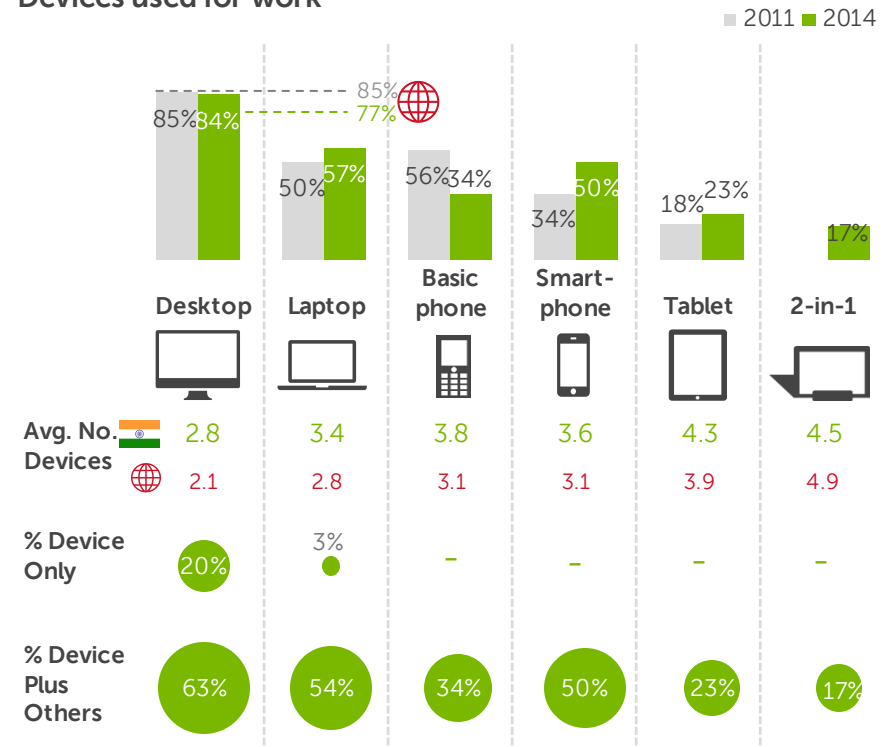
Use touchscreen for work



Performance (62% ranked #1) is by far the most important consideration people look for in a work device, followed by battery life (11%). This is likely due to the prevalence of desktops in the office.

When it comes to personal purposes, laptops (79%) are used more often than desktops (62%), as are smartphones (83%). These personal habits are likely shaping preferences for work devices.

Devices used for work*



The Office is King, but it's a Jungle Too

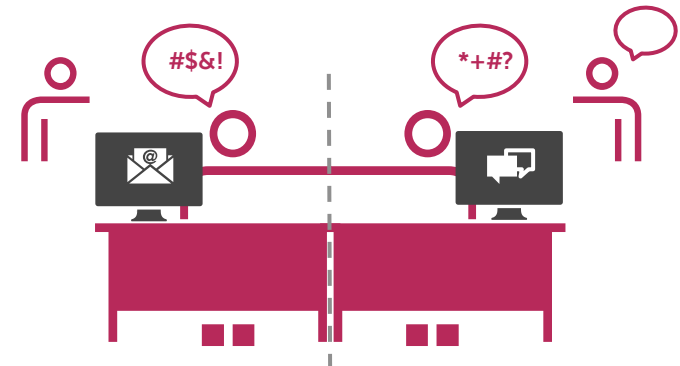


As technology is evolving, so is the office landscape. By far, most work is being done in the office of an employer. However, only one-third spend at least 75% of their time there. Much work is also being done in external locations (66%), in the home (78%) and in public places (62%).

Despite working in multiple locations, the office is the most conducive to high performance. 80% of workers say they do their best work in the office and 79% report being either extremely or very comfortable working at their office desk (as compared to 50% globally).

Productivity and comfort in the office may be partially due to the high proportion of other family members who are in the home while work is being conducted, with 91% indicating someone else is in the home with them.

Whereas in developed countries communication channels that involve personal interactions are generally preferred over more remote options, in India, remote options are almost tied with personal interactions: In person to online meetings 4:3; phone calls to instant messaging 4:3, and phone call to email 4:3.



52%
are **frequently interrupted**
while working at desk

45% Emerging
50% Developed

72%
use email or IM
to communicate with other
people located nearby

67% Emerging
37% Developed

Work Life + Personal Life = Life



About three-fourths of Indian employee say they spend some of their working hours from home, but many spend time working at home after hours. Indian employees are very assessable to work whereas almost everyone takes calls or checks email after hours. With this level of intrusion on personal time, it's no surprise that nearly all Indian employees use technology for personal purposes while at work.

Employers in India seem to understand that BYOD provides employees with the ability to use the device of their preference and 76% of companies allow this. Employers also recognize that It is important to secure personal devices for their employees (71% are secured by the company's IT department) to protect important confidential information. Many employees not authorized to use their existing devices handle their company's disapproval by doing it anyway: 65% do this without their employers' knowledge.



93%

check work email

Emerging 83%
Developed 42%

93%

take work calls

81% Emerging
27% Developed

**while at home
(outside of business hours)**

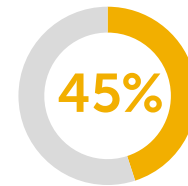
The Productivity Debate: Office Workers vs. Remote Workers



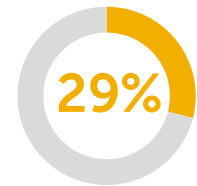
Indian employees have divergent views on whether remote workers are more or less productive than office workers. Middle/junior management are almost evenly split on their opinions, where executives are much more likely to believe those working at home are more productive.

Having the office is still perceived as important for team and togetherness (55% believe the central office will continue to exist at least in their lifetime), however, the flexibility working from home offers is very appealing. Additionally, being visible to management is also still very important for career development.

For most employees, working from home is more of a benefit than an expectation. Seven-in-ten view it as an extra benefit (comparable to other emerging markets).



Executive/senior management who think people working at home are more productive



Middle/junior management who think people working at home are more productive



The Secret to Happy Employees? Technology



There is a high priority placed on having the latest technology at work as nine-in-ten Indian workers consider it important (vs. six-in-ten of the global workforce/eight-in-ten emerging markets/four-in-ten developed countries).

Reinforcing this importance, roughly two-thirds would leave their job if the technology is not up to standards (a much higher proportion than other emerging markets), and two-thirds say the quality of the available technology would have a lot of influence on their decision to accept a new position (again, a higher percentage than other emerging markets).

Indian employees say...

They would likely quit job if the technology didn't meet with standards



The technology available would influence decision to take a new position



■ India
■ Emerging
■ Developed

Frustration with existing technology is evident: three-fourths of Indian employees feel that their organizations only deploy new technology when absolutely necessary, half of employees feel the technology they have available at work holds them back or keeps them from being productive, and just over one-third of employees feel that technology has hindered their career growth.

Technology has hindered career growth



Available technology at work prevents productivity



■ India
■ Emerging Countries
■ Developed Countries

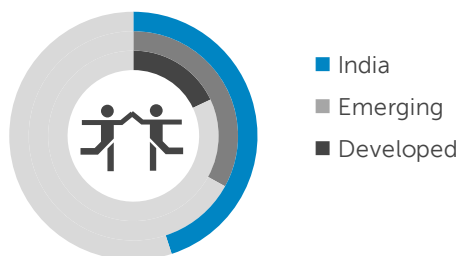
The Future of Tech in the Workplace is Bright, but Not Fully Automated



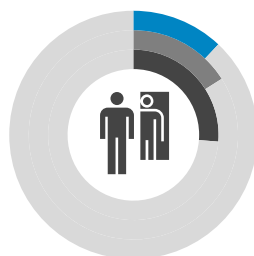
Employees believe that technology will continue the trend toward mobile, with roughly half expecting tablets to completely replace laptop computers before they retire.

In general, Indians are open to new technology: 45% feel technology brings people together, while only 12% feel technology separates people.

Technology brings people together



Technology separates people



38% of Indian employees agree that technology is fine, but some things are just better done by people (vs. 65% in developed countries).

Just under three-fourths believe that technology will hit a limit on the ability to improve productivity (although not any time soon). However, some feel advancements in technology will replace the need for humans in the workplace—about one-half think their jobs will be fully automated in their lifetimes.

Employees think their job will be fully automated...

Before I retire



Before I die



In the distant future (not during my lifetime)



Won't ever happen



■ India
■ Emerging Countries
■ Developed Countries