



Turkey

Employees in Turkey are drawn to the latest technology in the workplace yet are limited by traditional work environments and employer-provided devices.

Most Turkish employees still work in a traditional office layout, still use desktops despite their preference for laptops, and say they are more productive when working from an office. Even though many spend some time working from home, it is generally perceived as a benefit rather than expectation. And it is potentially a risk to career development as many still feel that those working from less productive than office workers.

But in the face of their challenges, Turkish employees are generally forward thinking about technology and have a clear point of view about the importance of technology in the workplace despite some lingering concerns about where it is headed and their ability to keep up with it. They are driven by having the latest technology both in their professional and personal lives and will go to great lengths to get it.



One Size Doesn't Fit All



Most employees use a desktop computer for work in Turkey, but show much lower usage of the desktop for personal purposes. About half as many desktop users identify it as their most preferred work device, while the laptop is considered the favorite by nearly as many.

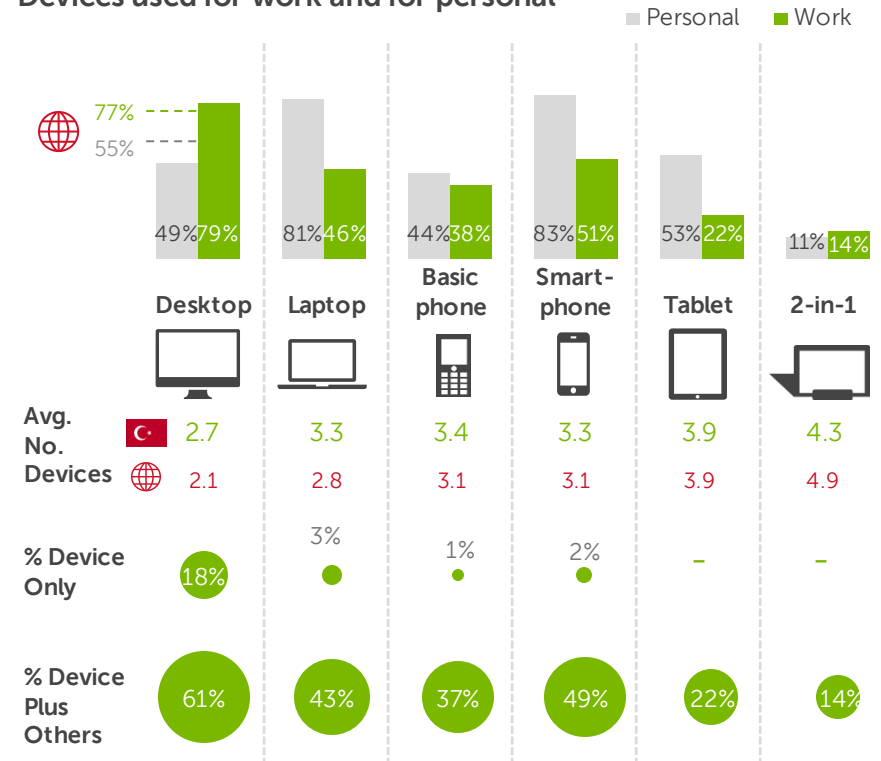
Smartphones are used for business purposes by just over half of employees, a higher proportion than most other emerging markets.

Tablets and 2-in-1s have relatively low overall work usage (22% and 14% respectively), but far exceed global usage of these devices (14% and 8%).

When considering a work device, performance is given the highest priority, followed by battery life and software compatibility at nearly equal levels.

While adoption of more mobile devices may not yet be commonplace in Turkish organizations, there is clear movement by employees to take advantage of more mobile and versatile options in their personal lives. When it comes to personal purposes, laptops (81%) are used more often than desktops (49%), as are smartphones (83%) and tablets (53%).

Devices used for work and for personal



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



The Turkish workplace is very traditional with 98% of employees spending at least some time there each week and four-in-ten spending at least 75% of their time there. Employees in Turkey spend about 65% of their working hours in the office, about 20% of their working hours at home and a few hours each week at external offices or public places.

The office is the most conducive to getting the best work out of employees with 65% of workers saying that as compared to only 15% who say they do their best work at home. Turkey has a higher proportion of traditional offices (47%) than nearly all other emerging markets and fewer fully open floor plans (21%).

Communication channel preference varies among the workforce between personal and less personal methods. Though in-person meetings win out over online meetings (5-to-2 in Turkey vs. 3-to-1 globally), phone calls and instant messaging are preferred at near equal levels, as are phone calls to email. Additionally, 62% of employees admitting to frequently emailing or IMing with other people located near them.

While mobile email is used as frequently among young and middle-aged employees, younger staff more frequently access email from personal devices, requiring them to invest in the technology they need to be accessible to work. The older staff tend to be able to use company provided devices.

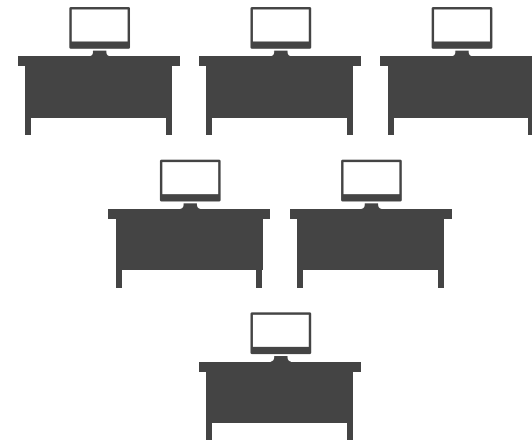
Working hours spent in traditional office layout

Turkish employees spend...

47%

in **traditional (offices and cubicles) floor plans**

37% Emerging
40% Developed



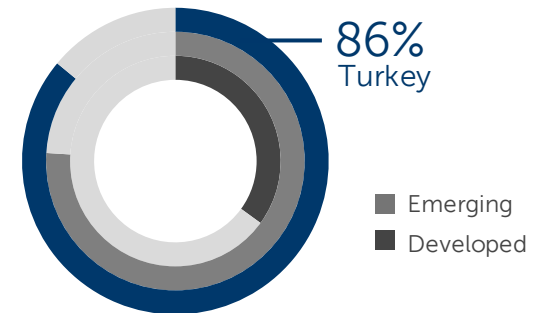
Work Life + Personal Life = Life



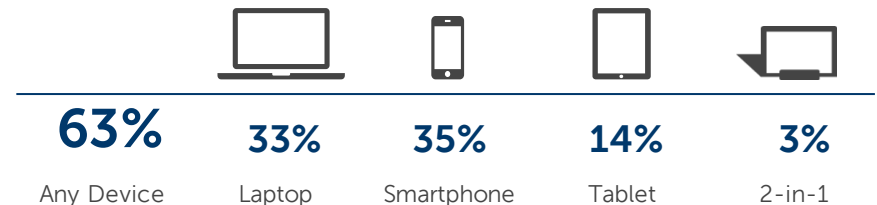
Turkish workers have a greater ability to bring their own device than any other country studied and take advantage of that offer with 81% of people using personal devices for work. However, about two-thirds of all employees use personal devices for work without their company's knowledge. The most frequent secret use is with more mobile devices such as laptops and smartphones. There is a clear disconnect as there is seemingly little reason that employees would feel the need to secretly use devices that may put confidential company information in jeopardy.

While two-thirds of Turkish employees say they spend some of their working hours from home, more than that take work calls (85% Turkey vs. 52% globally/81% emerging) or check email (87% Turkey vs. 62% globally/83% emerging markets) after hours. All the work put in after hours may be the reason that 97% of employees use technology for personal purposes while at work (which is acceptable to employers).

BYOD allowed to be used for business purposes



Using personal devices without company knowledge



The Productivity Debate: Office Workers vs. Remote Workers



Turkish employees show their dedication to hard work with over nine out of ten employees are working at home at least some of the time, higher than seen in both emerging and developed countries. Even still, opinions about working from home are more traditional and are divided in the Turkish workforce—43% feel that those working from home are *more* productive than those in the office, but 39% feel that those working from home are less productive. This is driven by generational differences where younger employees are more accepting of working from home, while older employees are resistant.

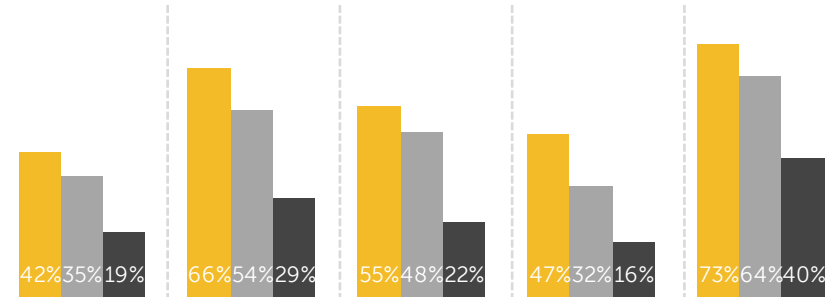
To facilitate this, just over half (66%) of Turkish employees are currently using personal technology devices for business purposes—this is slightly higher among non-managers than managers (66% vs 61%).

With such high working from home levels and use of personal devices to fulfill job requirements, it is not surprising that employers allow their staff to take care of personal tasks as needed. They generally do not restrict employees from using work technology for personal purposes while at work, and currently 97% of employees indicate that they do so.

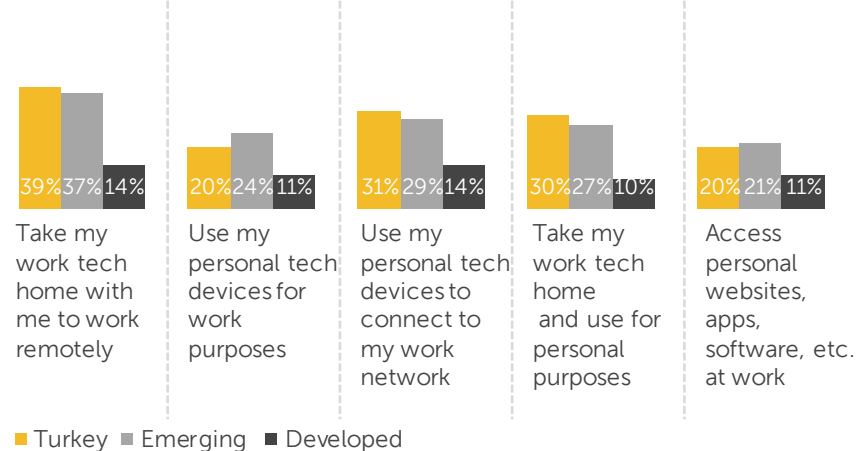
There will always be a role for the central office according to today's Turkish workforce, whereby 55% believe the central office will continue to exist at least in their lifetime (vs. 61% emerging market average).

For most employees, working from home is more of a bonus than an expectation. Three-fourths view it as an extra benefit.

Do currently



Expect to do in the future



The Secret to Happy Employees? Technology



Just over three-fourths of Turkish workers consider it important to have the latest technology and more than nine-in-ten feel that technology has had an influence on the way they work in the past year.

46% would leave their job if the technology didn't meet their standards (a proportion higher than most other emerging markets), and 87% say that the quality of the available technology would have at least some influence on their decision to accept a new position (47% say available technology would have a *lot* of influence on taking a new position).

Despite being constantly connected to work as we see from virtually all Turkish employees, they generally consider mobile technology helpful as opposed to a hindrance. While a small group, twice as many women feel that mobile technology requires them to be connected to or accessible to work after business hours which distracts them from being involved with family (11% vs 5% of men). But overall employees believe mobile technology enables them to manage their work/life balance.

Employees in Turkey 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



Mobile technology allows me to work from anywhere and be more involved with my family while not ignoring my work responsibilities



- Turkey
- Emerging
- Developed

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

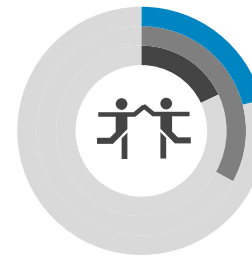


While it's clear that technology plays an important role in the Turkish workplace, there are still disparate attitudes about technology among the workforce. 32% agree technology separates people (vs. 16% emerging market average) while only 21% feel technology brings people together (vs. 33% emerging market average).

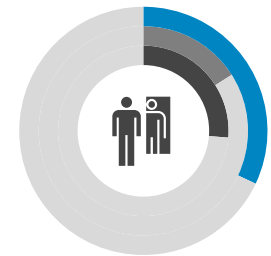
Over four-in-ten Turkish workers feel that technology is advancing faster than we can keep up with it, but nearly as many feel that having the newest technology is important.

Additional concerns come with technology advancements, including the risk that technology will replace the need for humans in the workplace—nearly two-thirds think their jobs will be fully automated in their lifetimes (vs. 50% emerging market average).

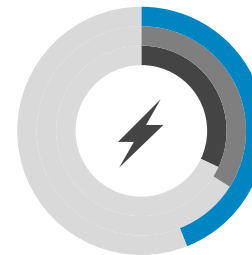
Technology brings people together



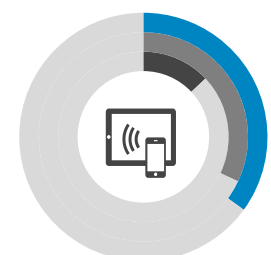
Technology separates people



Technology is advancing faster than we can keep up with it



Important to always have the newest technology



- Turkey
- Emerging
- Developed