

REPORT

okta

The New Workplace: Re-imagining work after 2020.



YouGov®

The New Workplace: Re-imagining work after 2020.

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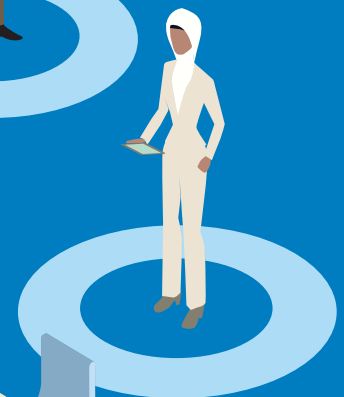
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Introduction

The COVID-19 pandemic has forced millions of people around the globe to stay in their homes. As a result, more employees than ever are working remotely.

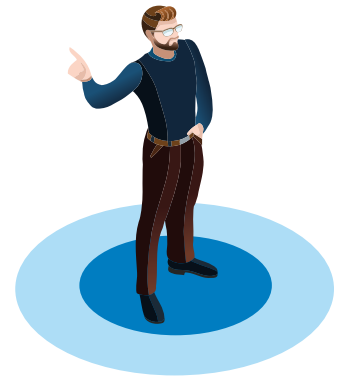
To some, this new way of working comes as a welcome relief; no more commuting, no more distractions and a noticeably improved work-life balance. For others, however, this overnight shift to remote working comes as a major challenge. Many companies, across sectors, have not implemented flexible or remote working strategies and are having to put in place new measures for their workforces rapidly, often with no previous comparable experiences.

Businesses that have long championed their digital transformation efforts are facing similar problems. For some that previously allowed employees the flexibility of home-working, only a small portion of the employee base will likely be working remotely at one time. Transitioning to large scale remote work is very challenging not only from a process perspective, but also culturally.

In some places and certain industries, working from home is viewed as an excuse for employees to do little work due to the lack of supervision or micromanagement, and others are concerned the lack of in-person communication that comes with remote working could have a negative impact on innovation and company culture.

However challenging, one thing is clear: we're never going to go back to normal as we know it, particularly when it comes to the way we work. A more agile, flexible workforce is the future, and it will bring with it major benefits from a cultural and economic perspective.

Okta's research, conducted by YouGov, surveyed 6,000 office workers across the UK, Germany, France and the Netherlands. Responses were collected between April and May 2020. We refer to this survey as 'Okta's research' and refer to the people who responded as 'respondents' and to office workers as 'employees.'



Section One:

Readiness to Work From Home

While many employees had previously been afforded the flexibility of working from home, albeit in most cases on a part-time basis, this isn't the case for everyone.

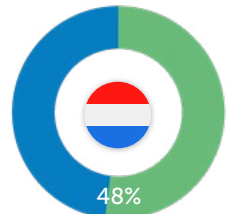
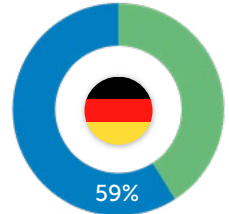
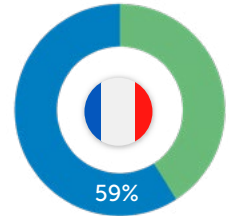
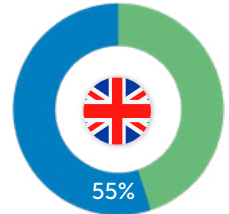
In the UK, for example, the majority of respondents (55%) said that prior to the pandemic, they had never worked from home and went into a physical office five days a week. This is particularly true for certain sectors, such as manufacturing (59%), construction (62%) and real estate (66%), that have long relied heavily on a traditional working environment.

This is the same across Europe. For example, 64% and 65% of those who work in the manufacturing industry in France and Germany respectively, are required in a physical office five days a week, along with 82% and 49% of those in the real estate sector.

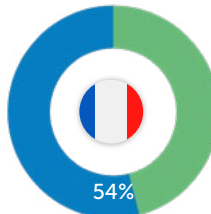
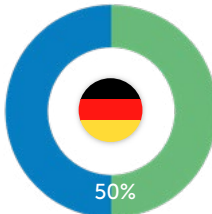
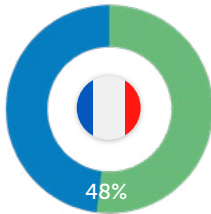
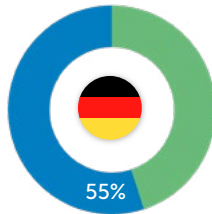
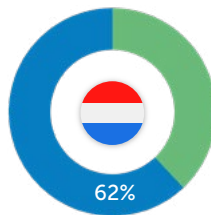
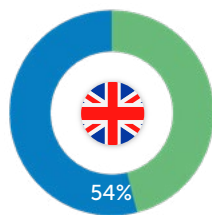
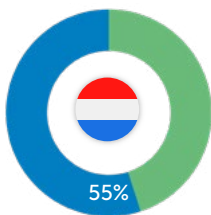
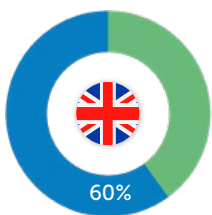
Switching from this strict regime has undoubtedly brought challenges, particularly for those businesses that hadn't previously implemented a large-scale working from home process. While digital transformation has been at the forefront of many organisations' strategies for the past few years, some companies - particularly those in non-digitally intensive sectors - are still lagging behind. Those that have failed to implement the processes that enable employees to access their tools remotely, are now having to fast-track the digital transformation of their workplace in order to adapt and carry on as business as usual.

According to Okta's survey, a large number of businesses had not previously acted to ensure their systems were not bound to a physical office. While 60% of UK respondents said they have been able to access the software that they need to carry out their day-to-day duties, some 24% of newly-remote workers said they couldn't and were therefore unable to be productive from home. This was particularly true for employees working in the retail (41%), transportation and distribution (36%) and hospitality and leisure (35%) sectors.

Never worked from home

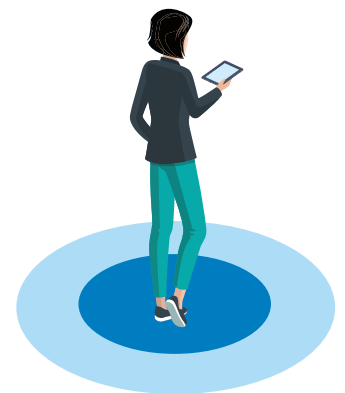


Feel equipped with the necessary hardware



Public Sector

Private Sector



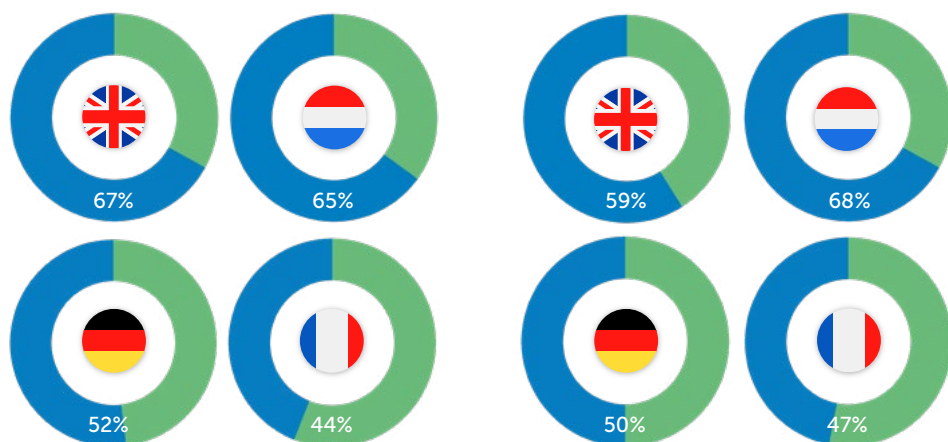
Readiness to Work From Home

This lack of preparedness is also being felt from a hardware point of view. While half of respondents said they had access to the necessary equipment, be it a portable computer or a place to put it, 28% said their businesses hadn't equipped them with the necessary hardware in order to be able to work productively at home. While the IT industry was well prepared, with some 81% of employees having access to the required equipment, only 29% of retail employees found themselves in the same situation.

One of the most prepared sectors, in the UK at least, appears to be the public sector, despite its reputation for often equipping staff with out of date equipment, such as desktop computers that can't be used remotely. Though some 60% of employees in the public sector are typically required to work in an office five days a week, it appears the sector was well-prepared for a shift to remote working; 60% of public sector staff had immediate access to the necessary hardware, with 67% having access to the required software.

By comparison, 54% of private sector employees surveyed said they were equipped with the right hardware, and 59% with the necessary software.

Feel equipped with the necessary software



Public Sector

Private Sector

This isn't a trend echoed throughout Europe, however. Public sector employees in Germany, for example, 72% of which are typically required to work in the office five days a week, lacked a similar level of preparedness, with only 55% of employees given the necessary hardware before a shift to remote working, and 52% the necessary software.

The Netherlands paints an even more interesting picture. Though just 23% of respondents said they were required in the office five days a week before the pandemic, the country remained prepared for a shift to widespread remote working; some 55% of staff said they were equipped with the necessary kit, while 62% of private sector workers said they had what they required.

The public sector in France, where almost 60% of employees are new to working from home, was the least prepared for the pandemic. Just 48% of respondents said they were given the right hardware, and just 44% with the necessary software, compared to 54% and 47% of private sector workers, respectively.

Section Two:

Security starts with trust

Trust is a core human value and an essential driver of innovation in security infrastructure. A lack of effective digital transformation process is often linked to security, with many citing concerns about the potential exposure of customer data and an increased threat surface. This is an issue that must be at the forefront now more than ever.

Since the COVID-19 pandemic began, companies across the globe have reported a worrying surge in cyber security incidents, be it an uptick in the number of phishing scams attempting to exploit the crisis or an increase in the number of attempted ransomware or DDoS attacks.

CTI League, for example, [which examined the cybersecurity landscape through March 2020](#), took down 2,833 indicators of compromise (IOCs) during this four-week period, the majority of which (99.4%) were malicious domains attempting to exploit the pandemic. Further, the group witnessed a large number of vulnerabilities - 136 per day on average - targeting the healthcare sector, along with a spike in the spread of disinformation, such as campaigns that associated the COVID-19 with the rollout of 5G equipment, and others that encouraged citizens to break lockdown orders.

This evolving threat landscape becomes more concerning with entire workforces now working remotely, as the endpoints employees use to connect to corporate environments are increasingly vulnerable when used outside of the office.



“We are now observing 3-4 threat campaigns a day worldwide, across several languages, including English, French, Italian, Japanese and Turkish.”

“Threat actors are actively using COVID-19 social engineering themes to try to take advantage of remote workers, health concerns, stimulus payments, trusted brands, and more. Initially Proofpoint’s threat intelligence team were seeing about one campaign a day worldwide, they’re now observing 3-4 each day across several languages, including English, French, Italian, Japanese, and Turkish. While all industries have been targeted, Proofpoint has seen specific targeting of healthcare, education, manufacturing, media, advertising, and hospitality organisations in certain attack campaigns.”

Richard Davis, International Cybersecurity Strategist.



proofpoint™

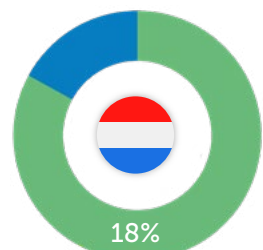
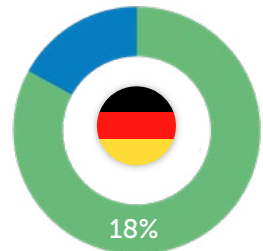
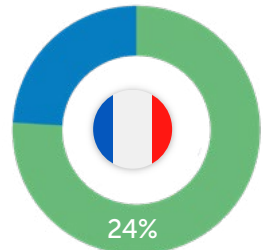
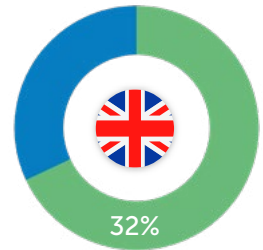
Security starts with trust

Given this recent rise in cyber incidents, the ever pervasive privacy issues surrounding our digital identities, the significance of trust has never been more important, and organisations now more than ever need to prove they are trustworthy to their employees in order to effectively facilitate this new way of working.

In the UK, a third of respondents said they were completely confident that the working from home online security measures implemented by their employer would keep them safe from cyber attacks, with just 4% saying they weren't confident at all. Again, this level of preparedness varies between sectors; while 58% respondents working in the IT industry trusted that their employer was 'completely prepared' from a security point of view, just a quarter of those in the retail and education sectors had a similar level of confidence.

This level of preparedness on a security level also varies on a per-country basis. In the Netherlands and Germany, for example, less than 20% of respondents said they were completely confident in their employers' ability to keep them secure online.

Complete confidence in employer's online security to work from home



The 2020 Okta Global Zero Trust Report found that while 60% of North American organisations are working on Zero Trust projects, the rest of the world is close behind at 40%.

But the issue of trust extends beyond the technology we use. It is now certain that we will move towards a more distributed workforce, where communication and culture will move beyond the boundaries of a physical location so that everyone is included and engaged and working efficiently, regardless of where they live.



Security starts with trust

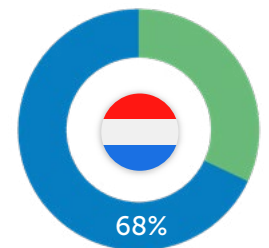
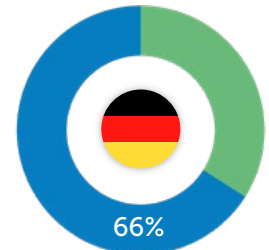
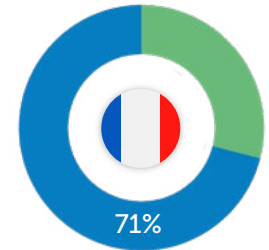
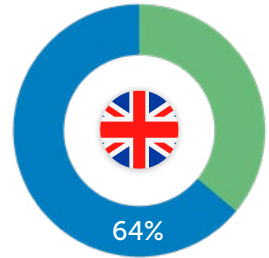
In some countries and companies working from home is seen by many employers as an excuse to do little work, particularly as it doesn't allow for over-the-shoulder supervision or micromanagement. However, this is not a viewpoint shared by most employees; in the UK, 60% of respondents said this perception definitely did not apply to them. This is echoed across Europe; in France, Germany and the Netherlands, some 62%, 58%, and 65% respondents agreed, with the majority of respondents across countries stating that productivity levels had remained the same, or increased, since the pandemic began.

And in light of the current situation, this widely-held belief appears to be improving; 64% of UK respondents said that they think that the perception of employees not doing enough work from home has improved, a viewpoint shared by 71% of respondents in France, 66% in Germany and 68% in the Netherlands.

With an increase in trust from an employers' perspective, working from home is likely to become more normalised and widely-accepted after the pandemic is over and staff are allowed back into a traditional office to work.

However, this traditional office could become a thing of the past; it's inevitable that some employers will choose to re-organise their workplaces or look for flexible office space rather than long-term leases.

Believe perception of employee productivity when WFH has improved



Section Three:

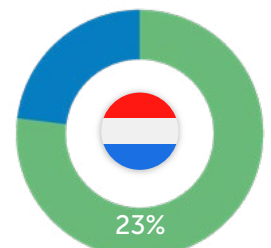
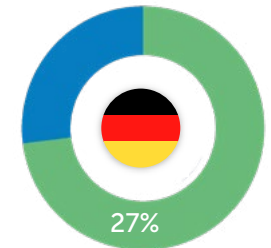
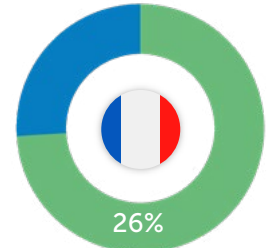
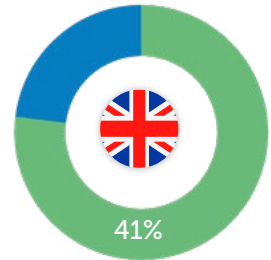
A cultural shock

Technology, though critically important in enabling a productive remote workforce, isn't the only hurdle that businesses and their employees are having to contend with in light of this rapid and unexpected shift to full-time working remotely.

There are also a number of cultural changes that must be considered. In big cities like London and Paris, for example, many live in cramped flats with no access to outdoor space, let alone an area to comfortably work. Others are being forced to contend with sharing their new office with the rest of their family, and in some cases their newly-homeschooled children.

This is making it hard for some employees to cope with their new work environment. A quarter of respondents in the UK said that they're unable to be as productive while having to share their space and look after children, while 23% said they were struggling due to not being in the same place as their co-workers. That's not all they miss; more than half (57%) of those surveyed in the UK say they miss having in-person conversations with their co-workers, 49% miss the relationships they have forged with those in the office, and 10% are missing the in-office benefits provided by their company, such as free food and snacks and fitness classes.

Miss having a dedicated working space



Interestingly, those based in London were the most likely to miss the more relationship-driven aspect of office working, with 67% said they yearned for in-person conversations. What's more, some 54% said they missed having a separate work and living environment, likely a reflection of the small, often confined apartments available to those working in a big city. By comparison, just 34% of those living in the Midlands said the same, along with 34% in Wales and 40% of those based in Scotland.

This yearning for a separate work space isn't felt as strongly across Europe, where even those in confined living quarters are more likely to have access to outdoor space. Just 23% of respondents in the Netherlands say they missed having a dedicated working environment, along with 26% and 27% in France and Germany, respectively.



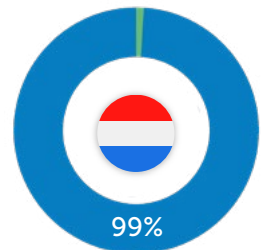
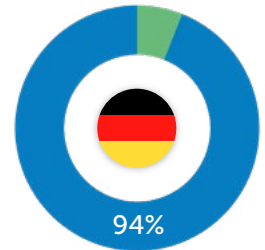
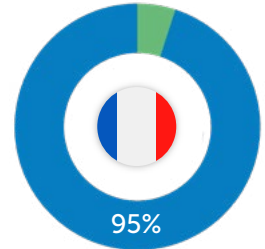
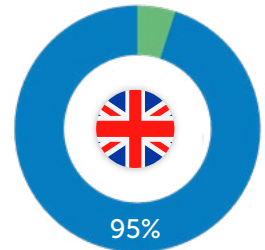
A cultural shock

The desire for more in-person interaction appears to be felt more widely, however; some 46% and 49% of respondents in Germany and the Netherlands said they missed casual conversations with colleagues, though just 9% of respondents in France said they missed in-person meetings.

This is likely thanks to technology. While it can't provide employers with complimentary tea and biscuits, nor a larger living space, it is helping co-workers to stay in touch effectively. As evidenced by the rapid surge in users seen by the likes of Slack and Zoom over the past couple of months, many companies have embraced collaboration and video conferencing software during the pandemic in a very short period. Our recent Businesses @ Work (from Home) study saw percentage increases in users of Zoom and Webex of 110% and 37% respectively.

The majority of UK respondents, many of whom are also adopting this technology to stay in touch with friends and family, said they were completely comfortable with virtual meetings, with just 5% saying they were not comfortable at all. This rapid shift to technological solutions has been felt on a Europe-wide basis; just 5% and 6% of respondents in France and Germany said they weren't comfortable with video-calling, as did a mere 1% of those surveyed in the Netherlands.

Comfortable with video-calling



Section Four:

The knock on effect

Before the pandemic, and before the majority of employees knew any different, many considered their familiar office setups as key to their productivity. A third of UK respondents considered themselves very productive prior to the outbreak, and a further 34% considered themselves to be fairly productive. Before their working environment was turned upside down, just 14% of respondents said they were not very, or not at all productive.

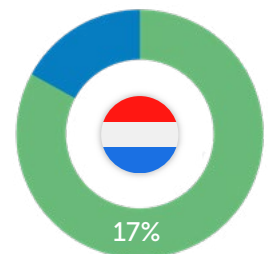
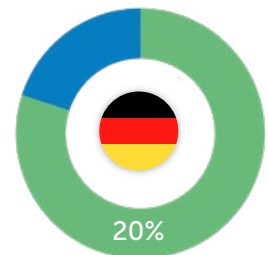
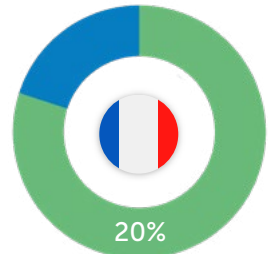
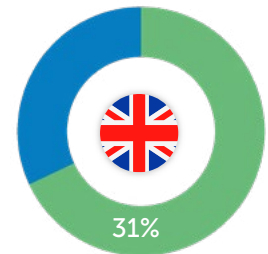
So, how has that changed now we're having to contend with unfamiliar working environments? While some may expect productivity levels to plummet given the aforementioned belief that a lack of over-the-shoulder supervision is seen by many employers as an excuse to do little work, almost 40% of respondents said they had maintained the same level of productivity while working from home, while a further 15% said they had been more productive.

What's more, almost 40% of respondents said that despite their new freedom they were working the same hours as normal, with only 20% working longer hours than they would in the office.

While 31% of UK employees surveyed said their productivity levels had taken a hit, likely due to a lack of effective remote working preparedness at their company, those who are thriving in their new work environment say the benefits are tantamount. For example, 62% said the increase in flexibility had helped them to focus more on work, 55% said their productivity levels were boosted due to the additional free time in their day, and 44% said that they had fewer distractions at home.

This productivity hit was felt even less across Europe. A fifth of respondents in France and Germany said they had seen their productivity levels dip since the pandemic, along with just 17% of employees in the Netherlands, likely due to the fact that they are more used to a remote working environment. Naturally, the benefits of working from home were just as widespread; 62% of those in Germany - where commutes can often be time-consuming and arduous - said they were getting more work done due to the increased amount of time in their day, while 54% of those in the Netherlands - where offices are often oversubscribed and poorly ventilated - cited fewer distractions as the biggest boost to their productivity.

Feel
productivity levels
have dropped



Section Five:

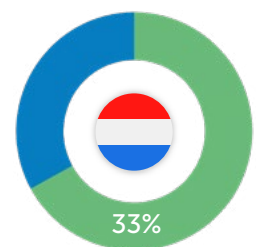
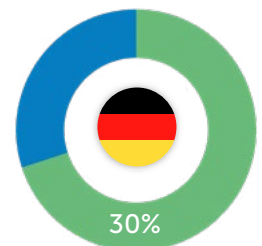
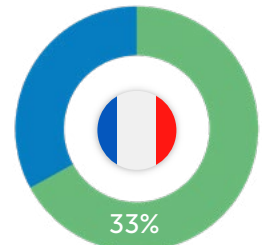
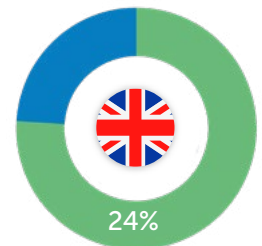
The future of work is dynamic

We don't yet know when this pandemic will be over, but we do know one thing: things won't ever go back to normal as *we know it*.

The traditional workplace, and the notion of going into an office five days a week, is a thing of the past, but that doesn't mean we'll all be working remotely. After all, not all of us want to - once the pandemic ends, as only 24% of UK respondents said they want to return to the office full-time, as did 33% of respondents in France, 30% in Germany and 33% in the Netherlands.



Want to return to the office full-time



Though the findings of the survey have varied on a per-country basis, the findings are similar in terms of what people want; the majority would like a flexible arrangement where they can work from home on a part-time basis. Of all those surveyed, across the UK and Europe, 35% said they would prefer this way of working going forward.

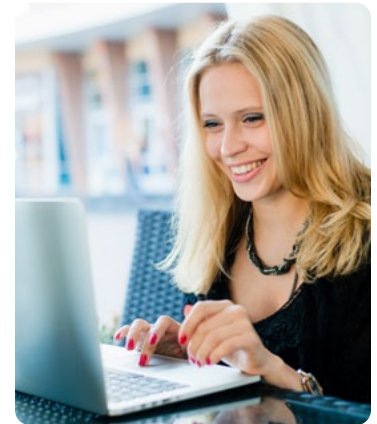
16% of those surveyed said that they'd prefer a fully remote working arrangement going forward, with 17% of those stating that they'd consider moving from their current location if their employer was to move to a fully remote working arrangement. This figure increases to 19% in the UK, an area where those in the city often struggle with tiny rented accommodation that can be difficult to use as a place to work.

The future of work is dynamic

As Okta's survey has shown, we all work differently, no matter what sector we work in. And while some sectors are more prepared than others, it's clear what our working cultures require a more dynamic approach - in which businesses rethink the traditional workplace in order to empower employees to truly be their most productive and successful selves wherever they work.

Some people, particularly those with the space to do so, perform better if they avoid their twice daily commute and head to work in their distraction-free home office, while those who live in more cramped accommodation, or work in industries that require it - get their best work done when in a more traditional office environment where they can be surrounded by co-workers and take part in face-to-face meetings.

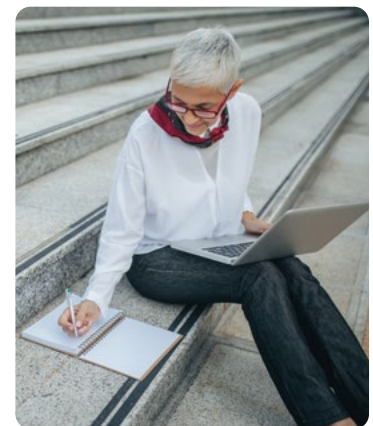
Companies that want to succeed in this new era of working dynamically, as Okta's survey has shown, need to be technologically-enabled and culturally-ready to manage the challenge. It's not just about enabling remote working for those employees who thrive in that environment, it's about focusing on providing the same quality of employee experience that the office life can give us.



A dynamic approach to work also offers bigger picture gains, such as improving the average employees' work/life balance. Research has shown that being able to balance these two worlds is often key to feeling happier, reducing stress and being more productive while at work, which in turn benefits any company.

Economically, this would not only allow businesses to be able to lower overhead costs and increase workforce productivity, but employees would also reap the rewards of no longer having to spend thousands of pounds a year on exhaustive commutes and workplace attire, nor would some feel they need to be bound to an expensive big city such as London, which has often been required for roles within certain industries.

As Okta's research has shown, living in a big city - and the smaller housing space that comes with it - can affect an employee's overall productivity and satisfaction levels, and assuming a business is prepared from a technology point of view, is not a necessary component of getting the job done.



The future of work is dynamic



“Unintentionally, COVID-19 put remote working technology to test at such a massive scale, for the first time. Over the years, we’ve observed a major rise in adoption and use of applications that enable people to work from anywhere (like Zoom and Slack), proving that the technology we need is available and works.” said **Jesper Frederiksen, Vice President and General Manager, EMEA, Okta.**

“What we’ve seen with our research, is that we need to fully shift culturally to a more dynamic way of working. Our vision is that Dynamic Work is much more than enabling employees to work from anywhere. It’s about providing employees with comparable benefits, flexibility, and experiential work environments in the location that best fits their needs; empowering employees to be their most productive and successful selves wherever they work.”

Even though it remains to be seen where businesses will be this time next year, it’s certain that the way we work is going to change.

At Okta, nothing is more important to us than the health and safety of our community, and we know many organisations feel the same. In response to the continually developing COVID-19 crisis, we’re seeing companies all over the world take various steps to help protect their employees. For many, this strategy includes enabling employees to work from home.



While many organisations were ahead of the curve, for others, staying secure and productive during this critical time has been a new and sudden challenge.



Your Remote Work Toolkit:

Start with Okta, go anywhere.

There are several tools your organisation can leverage to improve the remote work experience with Okta. To help you get started, we've created a list of some of the most popular remote work tools within the categories of video conferencing, document collaboration, VPNs, and others. In addition to the list, we've included links to each tool's respective free trials, as well as documentation to help with integrating them with Okta.

If your organisation is looking to quickly roll out identity management for remote working, you can get started using [Okta for Emergency Remote Work](#).

