



# **HYBRID SNAPSHOT: THE IMPACT ON EMPLOYEE AND IT EXPERIENCE**

**Canon**

---

## RESEARCH METHODOLOGY

Walnut Unlimited conducted research between 8th and 23rd February 2022 on behalf of Canon Europe. In total, 3,008 IT decision makers and end users took part in an online survey across seven European markets: Germany, Spain, France, UK, Italy, the Netherlands and Sweden.

Of the 3,008 survey participants, 1,791 are employees who are at least partially desk-based, working for organisations with a headcount of 50 or more. The remaining 1,217 are IT decision makers, all of whom are mid-level management or above, with ultimate authority – or significant influence over – IT infrastructure, solutions and/or printers and related devices.

# INDEX

### FOREWORD: TODAY'S WORKSPACE

This report from Canon Europe provides insight on how the pandemic and the rise of hybrid working has impacted business' outlook.

### PART 1: EMPLOYEE EXPERIENCE

Discover employees' most common remote working challenges and typical cloud capabilities.

### PART 2: IT EXPERIENCE

Get behind closed doors to find out what IT decision makers say are the biggest challenges of setting up and managing a hybrid workspace – from security and workflows to sourcing solutions.

### CONCLUSIONS

This report from Canon Europe summarises the key insights from the research and learnings for decision makers equipping their own hybrid workspace.

### FINDING SOLUTIONS

Find out how Canon has developed its portfolio to directly address the challenges organisations are facing today.

## TODAY'S WORKSPACE

- Marc Bory, Canon Europe Planning, Marketing and Innovation Senior Director & IRIS CEO

The world is changing faster than it ever has. Every year, it gets harder to make predictions about what will come next. But it's rare that an event truly shakes up our trajectory – causing not just an evolution, but a revolution – and Covid-19 is an example of exactly that.

As the dust settles, we wanted to find out more about the pandemic's lasting impact on business. We wanted to look below the headlines to find out the scale and permanence of hybrid working, and what it's really like being an employee or IT decision maker adapting to these changes.

The results of our research show just how extensive that impact has been. Before the pandemic, most computer-based jobs required employees to be in the office most of the time, with just 15% of European workers saying they have ever worked remotely<sup>1</sup>. Half of all our respondents say that their organisation is now in, or headed towards, a hybrid working model, and just one third are going to be entirely office-based.

### Between 58% and 82% of respondents say the way they work now is the direct result of Covid-19.

While most businesses we surveyed feel optimistic about the future, they are still playing catch-up. Technology to support these new changes is still a work in progress, with one in five employees having to provide their own equipment and the same proportion struggling to get remote IT support.

Meanwhile, even though many organisations report that they are connected to the cloud, few have completely rebuilt their business processes to work totally digitally, regardless of location. As a result, daily frustrations for employees are common. Looking ahead, most IT decision makers know they have a way to go, with 70% predicting a growth in IT investment to fully support new ways of working.

In this report, we review today's working environment through the eyes of two groups – the employees experiencing the day-to-day and the IT team powering that experience. By collecting data from more than 3,000 workers across European organisations, we can help decision makers understand and avoid typical pitfalls of hybrid working.

<sup>1</sup>European Commission, Telework in the EU before and after the COVID-19: where we were, where we head to





# PART 1: EMPLOYEE EXPERIENCE

Employees, as the frontline of the business, can be seen as a barometer for change. Research provides the most accurate way to take a snapshot of their experience and to understand how successfully organisations are managing these changes.

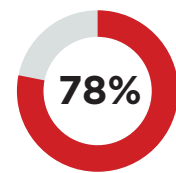
Almost overnight, employees had to unexpectedly get used to working from home full-time, often without the equipment they needed. At the same time, home working provided them with more freedom and the opportunity to embrace a better work-life balance. Understandably, employee experience over the past couple of years has been mixed, with media reporting periods of high productivity and positivity, followed by burnout.

“**Today, we’re seeing positive changes in how fast companies are adapting:** overall, 76% of employees believe that their company now provides the right technology to allow them to work effectively from home.”

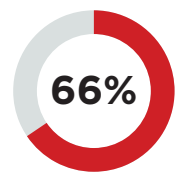
However, it’s a split picture. Employees who reported that they spent most of their time at home in the last two years were generally happy, with 78% reporting that their company provides them with what they need to do their jobs. But when we asked people who spent at least half of their time in the office, a third said their experience of IT for remote working falls short. It’s likely that this group spend more time in the office because they simply can’t work effectively from anywhere else.

**Research question:**

The company I work for provides the right technology to enable people to do their jobs regardless of where they’re working from.



Of those who agree, spend most of their time at home



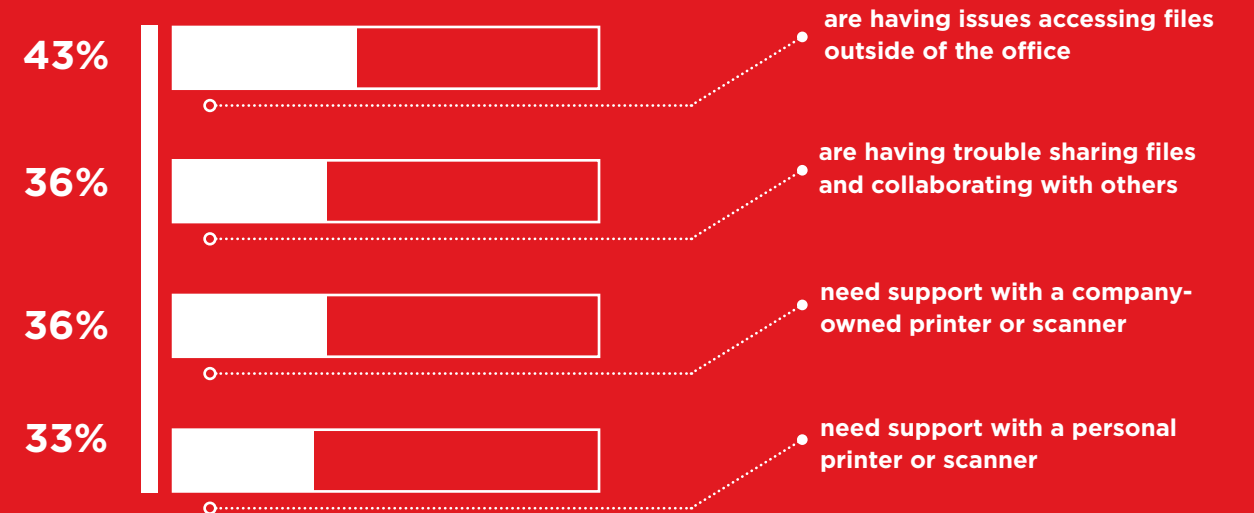
Of those who agree, spend most of their time in the office



## REMOTE WORKING ISSUES

**What are the most common issues still impacting offsite working?**

IT teams list the following as the most regular help-desk calls from employees while remote working:



**The top issues from the employee’s perspective are:**





It's clear that access to important documents, both digital and physical, represents one of the most prevalent challenges. This, combined with other related issues, such as signing and approval processes, suggest a wider problem: organisations have not yet completely rebuilt their business processes to function in a virtual environment.

As a result, we're seeing employees struggling to perform basic steps in everyday document-based workflows, such as invoice processing or contract approval, when outside of the office. Faced with these delays and issues, employees report that administrative tasks tend to escalate when they are working virtually.

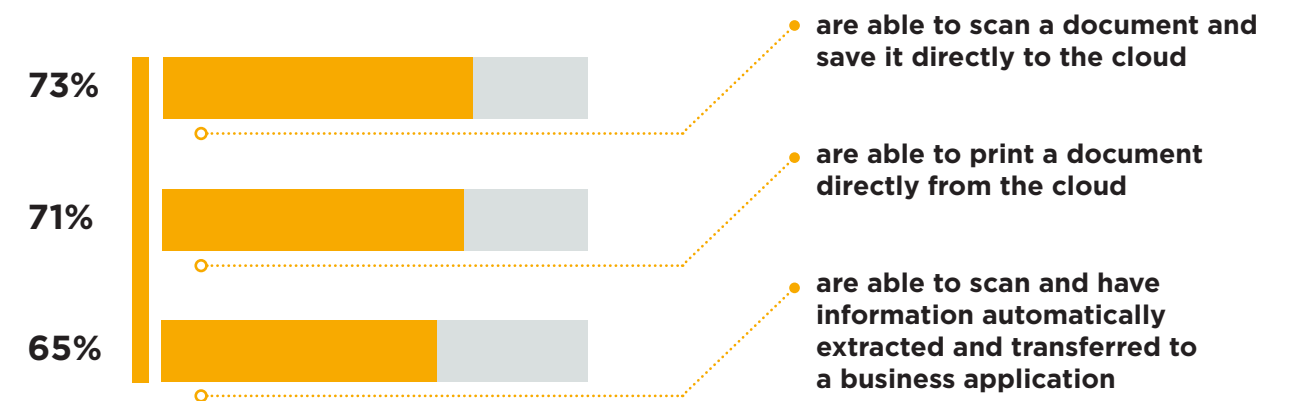
“ We will have to find a way to digitise everything and centralise common tools for more collaboration between employees.  
-IT Decision Maker respondent, France ”



## CLOUD AND EMPLOYEE EXPERIENCE

Although document and data access tops the list of challenges facing remote workers, our research indicates that most organisations already have cloud connectivity.

Four in five businesses are at least partially cloud-based, which is presumably why most users (75%) feel they're able to collaborate fairly well and have the ability to use the cloud for some document tasks:



However, it's still relatively rare for an organisation to be completely cloud-based (just 18%). A lack of cloud maturity can prove challenging when organisations need to function as a virtual team across hybrid locations.

Organisations might have the capability to support individual cloud-based functions, but gaps and frustrations appear when employees try to run a business process, like onboarding a new employee, from start to finish. This may explain why they report having to visit the office to get certain tasks done, such as picking up a document (19%) or getting something signed (16%).

“ Companies are achieving the basics with cloud connectivity, but there's still work to do on getting end-to-end business processes working effectively through the cloud.  
-Marc Bory,  
Canon Europe Planning,  
Marketing and Innovation  
Senior Director & IRIS CEO ”





# PART 2: IT EXPERIENCE



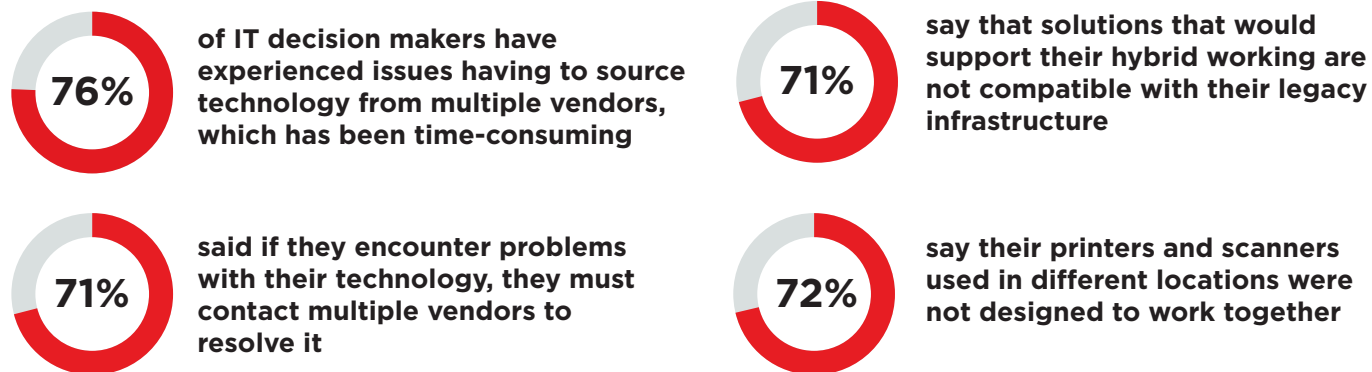
According to McKinsey's 2021 research, 65% of companies had increased spending on digital and technology during the pandemic, despite significant cost cutting elsewhere in the business<sup>2</sup>. This suggests that most companies are aware that they need to undertake digital transformation, fast. In fact, 64% say they would need to build a totally new digital business model by 2023, just to stay afloat.

This drive to innovate is having a huge impact on IT departments. As McKinsey concluded: senior executives are increasingly seeing technology innovation as a strategic differentiator, not simply a necessary cost. In turn, IT decision makers are playing an increasingly integral role in executing the company's vision and assuring success.

However, in addition to these pressures, IT teams are also having to manage fundamental changes to working practices. The shift towards hybrid working demands a replanning of how the business works: how employees communicate, how they share and access information and what solutions are required to maintain 'business as usual.'

## SOURCING IT FOR A HYBRID ENVIRONMENT

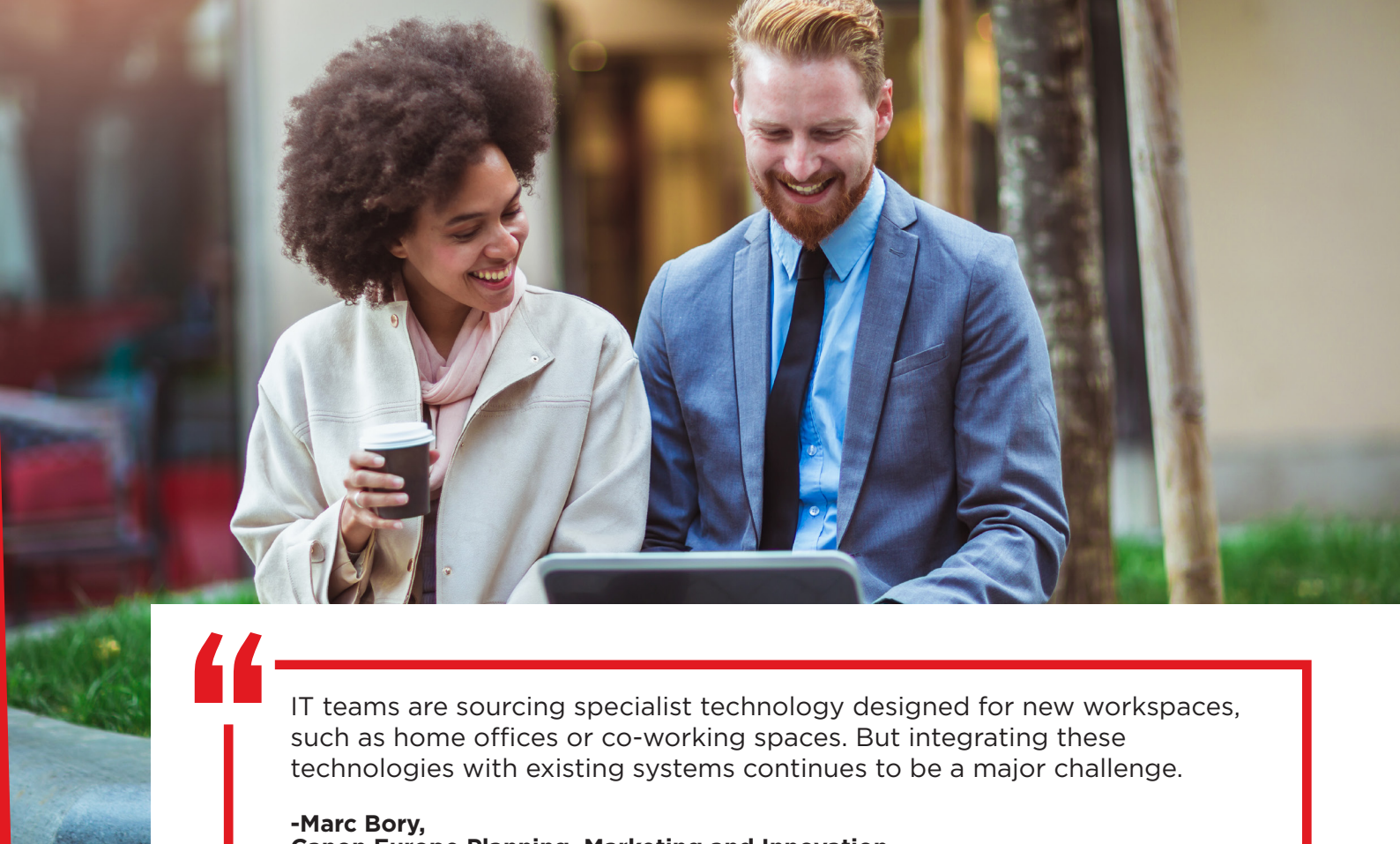
Our research identifies that this shift hasn't been easy for IT. Equipping new workspaces has provided a significant challenge, particularly in terms of compatibility and integration with existing systems:



When sourcing technology for a new environment, IT decision makers must prioritise functionality, looking for specialist tools designed to deliver the experience that employees require from that workspace. But our research suggests that this often comes at the expense of back-end complexity for the IT team.

Respondents report spending large amounts of time sourcing technology from multiple independent vendors. In the event of an issue, this compounds the time spent resolving it. Meanwhile, integration issues are also common, as these solutions have not been designed to work together. In fact, 71% say the solutions they need to support hybrid working are simply not compatible with their existing infrastructure.

<sup>2</sup><https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/the-new-digital-edge-rethinking-strategy-for-the-postpandemic-era>



IT teams are sourcing specialist technology designed for new workspaces, such as home offices or co-working spaces. But integrating these technologies with existing systems continues to be a major challenge.

**-Marc Bory,  
Canon Europe Planning, Marketing and Innovation  
Senior Director & IRIS CEO**

## BARRIERS TO CLOUD ADOPTION

According to our research, employees typically have access to the cloud and benefit from basic document functions. However, it's rare for them to conduct all their business activity in the cloud, and this creates some obstacles to effective hybrid working. So, what is stopping organisations from making a complete transition? We asked IT decision makers.

Of our respondents, 60% are conscious of the sensitivity of the data they keep locally, and we can see this particularly in banking and healthcare, where 38% say that compliance actually prevents them from further adoption.

There are also variations depending on country: Germany was the most cautious, with 70% of IT decision makers saying their organisation was sensitive about the data they held, and just 18% saying they plan to move everything to the cloud in future. At the other end of the spectrum at 35%, UK and Spanish IT decision makers were the most likely to plan a total cloud migration.

However, it's clear that despite external barriers, most organisations do still intend to continue their cloud transition. Two thirds of organisations say that they plan to move some of what they have on local servers to the cloud in future. But internal issues such as inertia or contract restrictions are an additional obstacle. 40% say they don't have the time or resource to transition and 30% say they are locked into local infrastructure due to upgrade cycles or depreciation.

Internal issues such as inertia or contract restrictions are an additional obstacle. 40% say they don't have the time or resource to transition and 30% say they are locked into local infrastructure due to upgrade cycles or depreciation.

**-Marc Bory,  
Canon Europe Planning, Marketing and Innovation  
Senior Director & IRIS CEO**

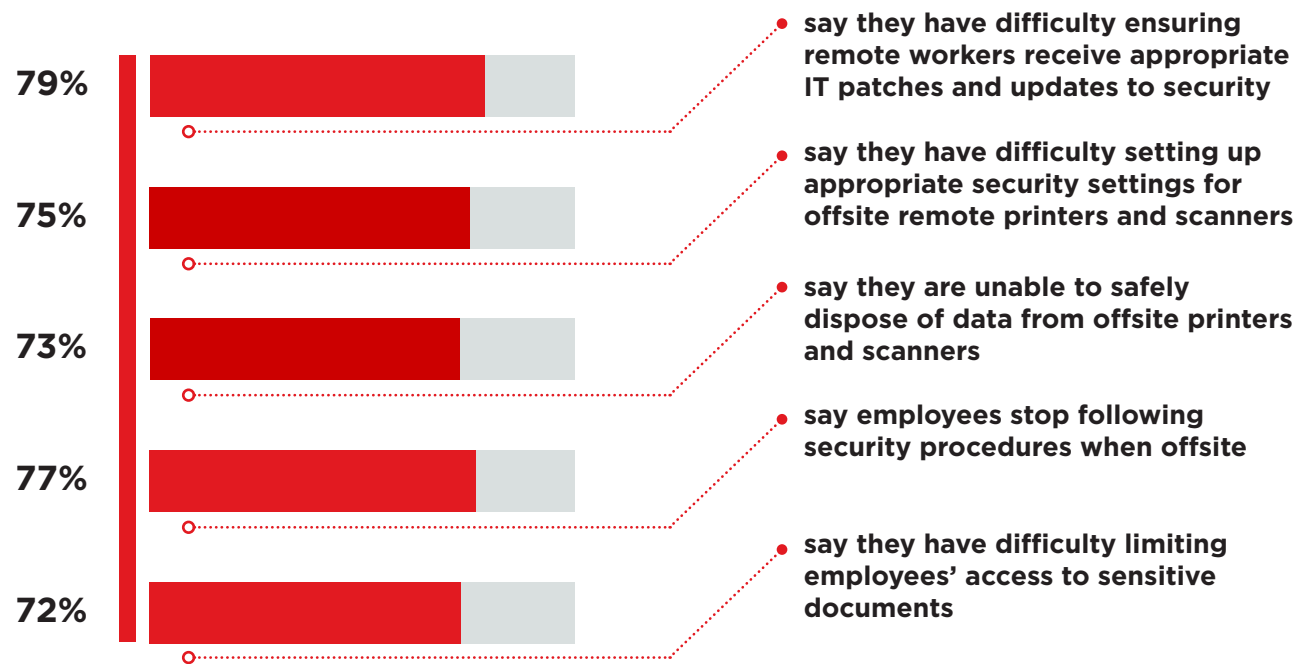


## SECURITY IN A HYBRID WORLD

Maintaining security is a top priority for any IT team, but the job has never been more difficult. Thanks to constant innovation, companies now use more methods to transfer information, from Microsoft Teams to Slack to WhatsApp, providing more channels to monitor and protect.

Hybrid working complicates the picture further. It's common, particularly early in the adoption of a hybrid working model, for workers to use devices that may not have been company-supplied or approved. It's also harder for IT teams to ensure these devices are properly set up, receive the updates they need, or that data is safely removed from them.

There's also a crucial behavioural element to consider – it takes time for people to establish new habits and learn new ways of working. According to our research, more than three quarters of IT teams report that employees stop following normal procedures when they leave the office. Companies will need to retrain employees on when security measures apply and any new security protocols that they should have in place.



“The biggest concern is safety. Now many of us work several days at home and there are many devices working. Cybersecurity is our biggest concern right now.”

-IT Decision Maker, Spain

## COMPLIANCE IN A HYBRID WORLD

In the last decade we've seen a massive shift in how society views technology and information. There is greater understanding of the power of personal data and more concern over how private companies acquire, store and share it.

As a result, organisations are now legally obliged to demonstrate that they have total control and visibility of how information flows through their business. Yet many simply aren't set up to deliver against this.

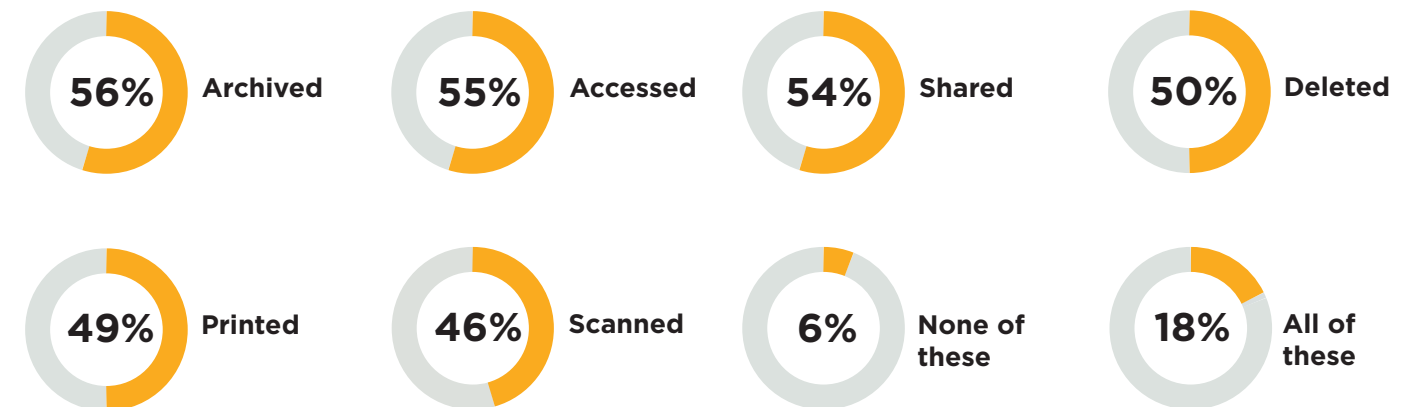
70% of IT decision makers say that compliance with GDPR is a key challenge, with nearly half

experiencing problems or non-compliance issues in audits. Ultimately, legislation has moved faster than many organisations have been able to keep up with.

It's still common for businesses to lack the tools to be able to track and monitor information in every stage of its journey through a business – a journey which has become increasingly complicated, crossing email, applications, social media, paper and much more.

In fact, just 18% of our respondents say they are able to track information across the full lifecycle.

Percentage of IT decision makers who report being able to track information across the following stages:



While almost all respondents have some kind of automation in place to support with tracking information to aid and demonstrate compliance, most (58%) have only implemented one automated process – typically automatically applied storage timeframes (43%).

This puts a lot of pressure on IT teams to manage information compliance themselves. Given the sheer amount of information that a company manages, such compliance is almost impossible to achieve manually.

In order to make this process easier, organisations should be looking to roll out digital and automated solutions that provide the level of visibility and control they need over their data.

With these in place, they would be better equipped for an audit or subject access request, as automated solutions provide a digital log of these interactions.

“Problems with handling paper documents are common for a mid-sized manufacturing company. This results in wasted time managing data, searching for lost or incorrectly stored paper documents. There is often no formal disaster recovery plan.”

-IT Decision Maker, Italy



## NEW WAYS OF MANAGING IT

Hybrid working adds complexities and additional work for IT teams in numerous ways.

In particular, time spent on fleet management can easily escalate: 30% of IT decision makers say they receive a high number of employee IT tickets related to printing and scanning, and a third say that employees struggle to connect offsite devices to the corporate network.

**WHEN ISSUES DO OCCUR, IT TEAMS FIND IT HARDER TO RESOLVE VIRTUALLY, WITH 29% SAYING THEY STRUGGLE TO REPAIR OR SERVICE THESE DEVICES.**

Some organisations are already investing in services to reduce the pressure on their internal teams, including ad-hoc remote and cloud-based services. Of all of the surveyed IT decision makers, 35% say that their companies have invested in one of the following services from third-party providers.



Remote reporting



Driver management



Remote servicing

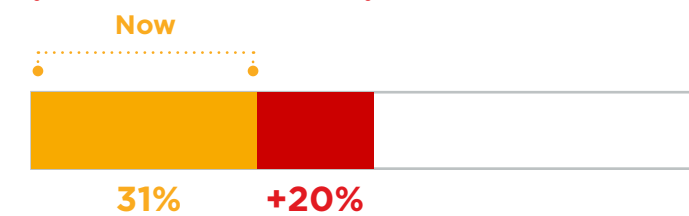


Cloud-based fleet management



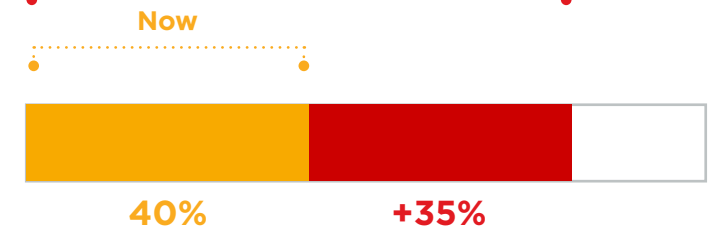
**Already buy hardware through an as-a-service subscription contract**

**Prediction in 3 years' time**



**Already buy software through an as-a-service subscription contract**

**Prediction in 3 years' time**



**Given that IT teams are increasingly taking on a more strategic role in businesses, we're seeing a rise in organisations outsourcing everyday IT management.**

For example, hardware-as-a-service contracts are rising in popularity, providing a complete end-to-end managed service and removing the responsibility for managing devices from internal teams.

31% of the surveyed IT decision makers already access hardware through an as-a-service subscription contract, while a further 20% say they intend to start doing so in the next three years.

This is not far behind the numbers using software: 40% of IT decision makers already buy software through an as-a-service subscription contract, while a further 35% intend to start in the next 3 years.





# CONCLUSIONS

- Marc Bory, Canon Europe Planning, Marketing and Innovation Senior Director & IRIS CEO

**“We’ve seen huge progress in companies adapting to enable hybrid and remote work. For the most part, we found that those already working in a hybrid set up feel that they’re able to function fairly effectively – they have basic cloud access and the ability to take advantage of that to share and collaborate fairly well. But it’s an evolving journey to finetune the hybrid experience.**



If we look closer, there’s still a significant portion of employees who can’t work effectively in a hybrid model at all. These employees seem to say that they are predominantly office-based because their tech is simply not good enough to make remote working feasible.

Meanwhile, employees engaged in hybrid working report niggling issues when it comes to running end-to-end business processes. While companies may have the basics in place, our research suggests most have yet to rebuild their document-based processes for a new hybrid world.

Understandably, they seem to particularly struggle with workflows that combine digital and physical documents. In these cases, employees report frustrating obstacles – they’re struggling to push documents through approvals, get them signed and may even actually have to go to the office just to collect or print documents.

“ While companies may have the basics in place, our research suggests most have yet to rebuild their document-based processes for a new hybrid world. ”

**-Marc Bory,  
Canon Europe Planning, Marketing  
and Innovation Senior Director  
& IRIS CEO**



However, our research also suggests that these issues are likely to improve. IT decision makers say they have committed to plans to transition more of their business to the cloud. Doing so should provide employees with a smoother hybrid working experience, providing access and virtual collaboration capabilities that better support distributed teams.

IT decision makers are also conscious of the additional security and compliance issues they face in a hybrid world. With employees using a greater variety of devices, across more channels and more locations, they have their work cut out monitoring the flow of information in and out of the business. Currently, IT teams are taking on responsibility for this process themselves, even when it’s proving an impossible task.

IT management and responsibilities can easily snowball in a hybrid environment, so IT decision makers should prioritise looking for solutions and services which reduce that complexity and pressure on internal resources.

From automation solutions to third-party services, there is huge opportunity in this field. One example is device management.

IT teams now need visibility and control over devices outside of their previous on-site remit. With more than enough on their plate, IT decision makers are turning to managed services and simpler, lower risk as-a-service contracts.

Compatibility and integration is another challenge for organisations creating a hybrid workspace. Many are trying to build on top of the office-centric systems and infrastructure they already have in place. They are tasked with finding technologies and solutions made for new, additional environments, but there is no guarantee that these are going to be compatible with legacy IT.

While few organisations want or can afford to ‘begin again,’ our research suggests there will be a renewed interest in technologies which are designed to prioritise integration and make the transition easier.”



# FINDING SOLUTIONS

## A SINGLE PARTNER

Hybrid working presents new challenges for IT teams from a sourcing, management and support perspective. 71% of IT decision makers say that if they encounter problems with their technology, they must contact multiple vendors to resolve it. It then makes sense that organisations are looking for ways to simplify the integration and management of their workspaces.

---

**81% of IT decision makers say they want to work with technologies which are:**

- **Compatible, because they have been designed to work together**
  - **Open to integration with other solutions**
  - **Equipped with a single point of contact in the event of an issue**
- 

Canon's Digital Transformation Services deliver a complete workspace technology ecosystem which integrates your hybrid workspaces.

Through a combination of hardware, software and services, Canon can help businesses secure and optimise content and document management, streamline complex business processes and create an effective print infrastructure - all through one point of contact.

This efficient, future-proof and highly secure ecosystem helps teams gain transparency and control over the entire document lifecycle and related processes.







## SIMPLIFYING SECURITY AND COMPLIANCE

**Given the complexity of managing security and compliance in a hybrid workspace, organisations are looking for vendors' support in keeping their information safe.**

81% of IT decision makers say they think it is important for future print and scan devices to offer advanced built-in security features. A further 83% think it is appealing to have built-in solutions and services which offered value over and above that provided by a hardware investment.

---

**We package our hardware with services and solutions which deliver added security and compliance benefits, making the most out of your investment**

---

At Canon, we understand this need from our customers, which is why we embed security into everything that we do. Our solutions and services help to secure all documents and sensitive data, whether on paper or in a digital format, across the document lifecycle.

Our devices are tested for security vulnerabilities as part of our standard launch process before being released to the market. This results in hardware which is 'secure by design', helping to maintain a safe working environment from day one.

So many of our customers face challenges through regular audits. But with our solutions, compliance can be much simpler, providing greater visibility and control over every stage of the document workflow. When customers make a hardware investment through Canon, they are able to package it with compatible software and services that deliver added security and compliance benefits, making the most out of their investment.

## EASIER TRANSITION TO END-TO-END CLOUD WORKFLOWS

**Cloud is a necessity in a hybrid world. While four in five of organisations are already connected to the cloud, the next step for them is to redesign business processes to run entirely through the cloud, from end to end.**

Cloud connectivity options are built into all Canon technologies, from devices to advanced document management solutions, making it easier for customers to build efficient, secure cloud-based workflows.



**DEVICES** - Our printers and scanners are connected to the cloud, making it easier for distributed teams to send, receive and collaborate on documents with colleagues, no matter where they are based.



**SOLUTIONS** - Our cloud-based solutions help to boost efficiency and give organisations more control of their document workflows. For example, our print management solution uniFLOW Online gives customers centralised visibility and control of all devices being used by their employees across locations.



**VALUE ADDED SERVICES** - Our services can be delivered via the cloud, giving customers the support and capabilities they need, without the pressures of financial risk or administrative management.

For example, our service, Cloud Workspace Collaboration - Process Automation gives customers access to pre-configured business applications, such as invoice processing, straight from their device. The service - which is paid for on subscription - gives companies instant access to cloud-based workflows, without complex implementation.



**DISCOVER THE 9 KEY QUESTIONS YOU SHOULD BE ASKING TO PERFECT YOUR HYBRID WORKING OPERATIONS.**

**READ OUR EBOOK 'HYBRID BUSINESS NOW'**





**Canon Inc.**  
Canon.com

**Canon Europe**  
canon-europe.com  
English Edition  
© Canon Europa N.V., 2022

**Contact us:**  
4 Roundwood Avenue,  
Stockley Park,  
Uxbridge,  
UB11 1AF, UK