THE FUTURE OF WORK: ASIA PACIFIC
DECEMBER 2017
METHODOLOGY

OFFICE PROFESSIONALS
18+, Employed across various sectors, work with a computer daily

WHEN
Oct 17, 2017 - Nov 13, 2017

HOW
15-Minute online survey

Total Respondents - 4702

APAC Margin of error (± 2%)

HONG KONG: 521
KOREA: 558
CHINA: 1261
AUSTRALIA AND NEW ZEALAND: 761
INDIA: 678
SOUTHEAST ASIA: 346
TAIWAN: 577
KEY FINDINGS

People

- APAC office workers are most motivated to work to support their lifestyle and families.
- More than 60 percent of APAC office workers live in major metropolitan cities.
- With commute time topping the list of challenges of working in a major city, APAC office workers are most likely to leverage technology to work across their devices and be available 24x7.

Experiences

- APAC office workers rate cutting-edge technology over all other workplace amenities like food and office design.
- Collaborative technologies enable office workers be more innovative.
- Apart from driving use of technology, young workers help increase focus on creative thinking and innovation, and drive open-minded and diverse work environments.

Machines

- Technology enables workers to deliver efficiencies and improve productivity.
- Office workers who rate their company as above-average business performers are more likely to say their organization is “extremely focused” on leveraging workplace technology compared to those who rate their company as below-average performers.
- Despite overall concerns, APAC workers are willing to try cutting edge technologies like artificial intelligence and machine learning to help with work-related mundane tasks.
PEOPLE
LIFESTYLE AND SUPPORTING FAMILY ARE MOTIVATORS TO WORK

Q. How much do the following motivate you to work? (Ranking calculated basis weighted average of responses “Not at all motivating”, “Somewhat Motivating” and “Extremely Motivating”)

* Respondents across India, Australia & New Zealand, and Korea voted financial support to family as primary motivation to work. Office workers in China rated this parameter as their least motivating factor.
A VAST MAJORITY OF RESPONDENTS WOULD WORK EVEN IF THEY WON A LOTTERY

Q. If you were to win the lottery and draw a big sum of prize money, would you…

* 39% office workers in China would continue their current jobs even if they won a lottery. Nearly 56% respondents in China would use the lottery money to pursue their dream careers.
Most respondents work in a major city

- 62% Major metropolitan city – 5M+ population
- 21% Medium city – 2M – 5M population
- 14% Small city under 2M population
- 2% Other

Q. In your current job, is your workplace based out of...
Q. What are the most important factors behind your decision to work in a major city? Please select up to three.
TRAVEL TOPS CHALLENGES OF WORKING IN A MAJOR CITY

1. Crowded public transport
2. Long travel time for short distances
3. Juggling the demands of a fast-paced environment
4. Uneven mobile / wireless technology experience while working outside the office

Q. How challenging do you find the following aspects related to working in a major city? (Ranking calculated basis weighted average of multiple parameters rated across “Not at all challenging”, “Somewhat challenging”, and “Extremely Challenging”.)
TECHNOLOGY HELPS OFFICE WORKERS OVERCOME CHALLENGES OF LIVING IN MAJOR CITIES

Q. How does technology enable you to overcome the challenges involved in working in a major city? Please select top two.

- Able to work across all my devices: 68%
- 24X7 availability: 60%
- Collaborate with my team: 48%
- Automate menial tasks to save time: 24%
EXPERIENCES
Q. Among the following, which are the strongest motivations for you to stay at your current job? Please select up to three.

* Over good pay and benefits, respondents in China rated their ability to advance (69%) and high quality workspaces (50%) as most motivating factors in their current jobs. Office workers in Korea are strongly motivated by their organizations offering them the ability to support social causes (40%).
Respondents in Australia & New Zealand are strongly motivated by focus on innovation and blue-sky projects. Respondents in Hong Kong are most motivated by their companies’ investments in community and fun activities.
TECHNOLOGY WINS OVER ALL OTHER WORKPLACE AMENITIES

Q. Of the following factors, which are the most important in creating your ideal physical space at work? Please select up to three.
MOST COMPANIES FOCUSED ON FOSTERING NEW IDEAS AND INNOVATION

85% Companies are focused on innovation*

Q. How focused is your organization on fostering new ideas and innovative projects?

* Respondents in India (91%) felt most confident about their organizations' focus on fostering innovation, while office goers in Hong Kong (75%) were most skeptical.
COLLABORATIVE TECHNOLOGY HELPS OFFICE WORKERS BE MOST INNOVATIVE

Q. Please rank these in terms of how valuable they are in making you more innovative in your job? (Ranking calculated basis weighted average of multiple parameters ranked in order of importance, with 1 being most important and 5 the least.)

* Office workers in Australia and New Zealand ranked state-of-the-art technology as key to them innovate at work.
Increased focus on creative thinking and innovative projects

Q. To what extent are the following changes being driven by the entry of younger workers in your organization? (Ranking calculated basis weighted average of multiple parameters rated across "Not at all", "Somewhat", and "To a large extent").
MACHINES
Q. Organizations today are bringing ‘experiences’ to the core of their businesses – and making investments to ensure their customer as well as employee experiences are compelling. How focused is your organization in leveraging technology to enable your productivity and experience as an employee?
OUT-PERFORMING COMPANIES ARE MORE LIKELY TO BE FOCUSED ON WORKPLACE TECHNOLOGY

Office workers who rate their company as above-average business performers* are more than twice as likely to say their organization is “extremely focused” on leveraging workplace technology than those who rate their company as below-average performers.

**2.4 X**

Above-average performer

36%

Below-average performer

15%

Q. How focused is your organization in leveraging technology to enable your productivity and experience as an employee?

Q. In the last twelve months, would you categorize your company as delivering superior / average / below average business performance against key competitors?

Data calculated by cross-tabulating responses for above questions.

* 30% of APAC office workers believe their companies have above-average business performance compared to competitors versus 11% of workers who say their companies have recorded below-average performance.

89% of employees who rate their companies as above-average business performers also believe their companies are technology-focused (compared to 64 percent for those who say their company is a below-average performer.)
Q. What are the most important things that technology enables for you at the workplace? (Ranking calculated basis weighted average of multiple parameters rated across “Not at all important”, “Somewhat important” and “Extremely important”.)

1. Better efficiency
2. Enhanced quality of work
3. Improved productivity
4. Better collaboration with others
5. Working when on the move
6. Easier implementation of innovative / blue sky projects
OFFICE WORKERS ARE CONCERNED ABOUT THE IMPACT OF AI AND MACHINE LEARNING ON THEIR JOBS...

Q. As Machine Learning (ML) and Artificial intelligence (AI) gain popularity, what is your position on the impact these technologies will have on your job?

(As a reminder, artificial intelligence is the broader concept of machines being able to carry out tasks that would normally require human intelligence. Machine learning is a current application of AI which gives computers the ability to learn without being explicitly programmed.)

* 57% office workers in Australia and New Zealand are not at all concerned about the impact of technologies on their jobs.
...yet most office workers are willing to try use AI for mundane tasks today

Q. How interested would you be in using Artificial Intelligence technology to help perform mundane work-related tasks today?

94% People Somewhat / Very Interested
WHAT WOULD THE OFFICE WORKERS DO IF THEY WON A LOTTERY?

38%

People continue doing the current job but work fewer hours
APAC: 27%

14% Stop working entirely
APAC: 5%

22% Continue doing the job with same capacity
APAC: 28%

38% continue doing the current job but work fewer hours
APAC: 27%

25% Pursue my dream career
APAC: 40%

66%

Availability of jobs
APAC: 66%

68%

Able to work across all my devices
APAC: 68%

MAIN FACTORS FOR CHOOSING TO LIVE IN A MAJOR CITY

Standard of lifestyle
APAC: 64%

Community
APAC: 44%

How does technology support office workers based in major cities?

24X7 availability
APAC: 67%

Collaborate with my team
APAC: 50%

Automate menial tasks to save time
APAC: 16%
THE FUTURE OF WORK - AUSTRALIA NEW ZEALAND

TOP FACTORS CREATING IDEAL PHYSICAL SPACE AT WORK

56% State of the art technology for my work station
APAC: 51%

50% Technology to help connect me to colleagues
APAC: 45%

26% Beautiful office design
APAC: 33%

IMPACT OF YOUNGER PEOPLE IN THE WORKPLACE

1. Open-minded and diverse work environment
   APAC Rank: 2

2. Extensive use of social media
   APAC Rank: 3

3. Increased focus on creative thinking and innovative projects
   APAC Rank: 1
**MOST IMPORTANT THINGS TECHNOLOGY ENABLES FOR THE OFFICE WORKERS**

1. **Better efficiency**
   - APAC Rank: 1

2. **Improved productivity**
   - APAC Rank: 3

3. **Enhanced quality of work**
   - APAC Rank: 2

**IMPACT OF ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING ON OFFICE WORKERS**

- **57% People not concerned**
  - APAC: 21%
  - Somewhat concerned: 26%
  - Extremely concerned: 8%
  - Not concerned: 9%

**INTEREST IN USING ARTIFICIAL INTELLIGENCE TO PERFORM MUNDANE TASKS**

- **87% Very / somewhat interested**
  - APAC: 93%
  - Not concerned: 45%
  - Not at all interested: 42%
  - Extremely concerned: 13%
WHAT WOULD THE OFFICE WORKERS DO IF THEY WON A LOTTERY?

- **48%** Continue doing the job in the same capacity
- **37%** Continue doing the job with same capacity
- **14%** Continue doing the job but work fewer hours
- **1%** Stop working entirely

MAIN FACTORS FOR CHOOSING TO LIVE IN A MAJOR CITY

- **60%** Availability of jobs
- **48%** Infrastructure
- **44%** Standard of lifestyle

HOW DOES TECHNOLOGY SUPPORT OFFICE WORKERS BASED IN MAJOR CITIES?

- **75%** 24X7 availability
- **62%** Able to work across all my devices
- **45%** Collaborate with my team
- **19%** Automate menial tasks to save time
**INDIA EXPERIENCES**

**TOP FACTORS CREATING IDEAL PHYSICAL SPACE AT WORK.**

- State of the art technology for my work station: 50%
- Technology to help connect me to colleagues: 43%
- Access to food and beverages: 31%

**IMPACT OF YOUNGER PEOPLE IN THE WORKPLACE**

1. Increased focus on creative thinking and innovative projects
   - APAC Rank: 1
2. Open-minded and diverse work environment
   - APAC Rank: 2
3. Extensive use of social media
   - APAC Rank: 3
Most Important Things Technology Enables for the Office Workers

1. Better efficiency
   APAC Rank: 1

2. Improved productivity
   APAC Rank: 3

2. Enhanced quality of work
   APAC Rank: 2

Impact of Artificial Intelligence and Machine Learning on Office Workers

38% Somewhat concerned
   APAC: 46%

33% Not concerned
   APAC: 21%

11% Not sure
   APAC: 6%

18% Extremely concerned
   APAC: 27%

Interest in Using Artificial Intelligence to Perform Mundane Tasks

95% Very / somewhat interested
   APAC: 93%

58% Very interested
   APAC: 44%

37% Somewhat interested
   APAC: 44%

5% Not at all interested
   APAC: 6%
SOUTHEAST ASIA

WHAT WOULD THE OFFICE WORKERS DO IF THEY WON A LOTTERY?

36%
Continue doing the job in the same capacity
APAC: 28%

62%
Infrastructure
APAC: 65%

70%
Able to work across all my devices
APAC: 68%

MAIN FACTORS FOR CHOOSING TO LIVE IN A MAJOR CITY

35%
Pursue dream career
APAC: 40%

57%
Standard of lifestyle
APAC: 64%

55%
Availability of jobs
APAC: 66%

24X7 availability
APAC: 60%

Collaborate with my team
APAC: 48%

Automate menial tasks to save time
APAC: 24%
**Technology to help connect me to colleagues**
- APAC: 45%
- 49%

**State of the art technology for my work station**
- APAC: 51%
- 46%

**Access to food and beverages**
- APAC: 27%
- 34%

**Impact of Younger People in the Workplace**

1. **Extensive use of social media**
   - APAC Rank: 3

2. **Increased focus on creative thinking and innovative projects**
   - APAC Rank: 1

3. **Open-minded and diverse work environment**
   - APAC Rank: 2

**Southeast Asia Experiences**
MOST IMPORTANT THINGS TECHNOLOGY ENABLES FOR THE OFFICE WORKERS

1. Better efficiency  
   APAC Rank: 1

2. Improved productivity  
   APAC Rank: 3

3. Enhanced quality of work  
   APAC Rank: 2

IMPACT OF ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING ON OFFICE WORKERS

40% Somewhat concerned
APAC: 46%

36% Not concerned
APAC: 21%

18% Extremely concerned
APAC: 27%

6% Not sure
APAC: 6%

INTEREST IN USING ARTIFICIAL INTELLIGENCE TO PERFORM MUNDANE TASKS

97% Very / somewhat interested
APAC: 93%

50% Very interested
APAC: 44%

47% Somewhat interested
APAC: 49%

3% Not at all interested
APAC: 6%
WHAT WOULD THE OFFICE WORKERS DO IF THEY WON A LOTTERY?

56%

Pursue dream career
APAC: 40%

86%

Standard of lifestyle
APAC: 64%

66%

Able to work across all my devices
APAC: 68%

Pursue dream career
APAC: 40%

Continue doing the job but work fewer hours
APAC: 27%

AVAILABILITY OF JOBS
APAC: 66%

Infrastructure
APAC: 65%

Collaborate with my team
APAC: 48%

24X7 availability
APAC: 60%

Automate menial tasks to save time
APAC: 24%
TOP FACTORS CREATING IDEAL PHYSICAL SPACE AT WORK.

CHINA EXPERIENCES

1. State of the art technology for my work station
   - 61%
   - APAC: 51%

2. Beautiful office design
   - 59%
   - APAC: 33%

3. Lounge and relaxation areas
   - 55%
   - APAC: 35%

IMPACT OF YOUNGER PEOPLE IN THE WORKPLACE

1. Increased focus on creative thinking and innovative projects
   - APAC Rank: 1

2. Open-minded and diverse work environment
   - APAC Rank: 2

3. Heavy focus on teams collaborating online
   - APAC Rank: 4
**Most Important Things Technology Enables for the Office Workers**

1. Better efficiency  
   APAC Rank: 1

2. Enhanced quality of work  
   APAC Rank: 2

3. Improved productivity  
   APAC Rank: 3

**Impact of Artificial Intelligence and Machine Learning on Office Workers**

- **Somewhat concerned**  
  APAC: 46%
  - 49% Somewhat concerned  
  - 5% Not concerned  
  - 41% Extremely concerned

- **Very / somewhat interested**  
  APAC: 93%
  - 49% Very interested
  - 49% Somewhat interested
  - 2% Not at all interested

**Interest in Using Artificial Intelligence to Perform Mundane Tasks**

- **Very / somewhat interested**  
  APAC: 93%
  - 49% Very interested
  - 49% Somewhat interested

- **Not concerned**  
  APAC: 27%
  - 49% Very / somewhat interested
  - 49% Somewhat concerned

- **Not sure**  
  APAC: 6%
  - 5% Not sure

- **Extremely concerned**  
  APAC: 27%
  - 5% Not concerned
WHAT WOULD THE OFFICE WORKERS DO IF THEY WON A LOTTERY?

40% Pursue dream career

60% Community

66% Able to work across all my devices

MAIN FACTORS FOR CHOOSING TO LIVE IN A MAJOR CITY

- Infrastructure: 58% (APAC: 65%)
- Availability of jobs: 52% (APAC: 66%)

HOW DOES TECHNOLOGY SUPPORT OFFICE WORKERS BASED IN MAJOR CITIES?

- 24X7 availability: 61% (APAC: 60%)
- Collaborate with my team: 47% (APAC: 48%)
- Automate menial tasks to save time: 26% (APAC: 24%)
HONG KONG EXPERIENCES

TOP FACTORS CREATING IDEAL PHYSICAL SPACE AT WORK:

- State of the art technology for my work station (44%)
  APAC: 51%
- Lounge and relaxation areas (43%)
  APAC: 35%
- Technology to help connect me to colleagues (32%)
  APAC: 45%

IMPACT OF YOUNGER PEOPLE IN THE WORKPLACE:

1. Extensive use of social media
   APAC Rank: 3
2. Increased focus on creative thinking and innovative projects
   APAC Rank: 1
3. Implementation of technology to break down legacy company processes for onboarding, communication, etc.
   APAC Rank: 5
THE FUTURE OF WORK - HONG KONG

**MACHINES**

**MOST IMPORTANT THINGS TECHNOLOGY ENABLES FOR THE OFFICE WORKERS**

1. **Better efficiency**
   - APAC Rank: 1

2. **Enhanced quality of work**
   - APAC Rank: 2

3. **Improved productivity**
   - APAC Rank: 3

**IMPACT OF ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING ON OFFICE WORKERS**

- Somewhat concerned: 56%
  - APAC: 46%

- Not concerned: 8%
  - APAC: 21%

- Not sure: 7%
  - APAC: 6%

- Extremely concerned: 29%
  - APAC: 27%

**INTEREST IN USING ARTIFICIAL INTELLIGENCE TO PERFORM MUNDANE TASKS**

- Very / somewhat interested: 86%
  - APAC: 93%

- Very interested: 16%
  - APAC: 44%

- Somewhat interested: 70%
  - APAC: 49%

- Not interested: 14%
  - APAC: 6%
TAIWAN

WHAT WOULD THE OFFICE WORKERS DO IF THEY WON A LOTTERY?

41%

Pursue dream career
APAC: 40%

33%
Continue doing the job but work fewer hours
APAC: 27%

25%
Continue doing the job in the same capacity
APAC: 28%

1%
Stop working entirely
APAC: 5%

41%
Continue doing the job but work fewer hours
APAC: 40%

MAIN FACTORS FOR CHOOSING TO LIVE IN A MAJOR CITY

70%

Infrastructure
APAC: 65%

Availability of jobs
APAC: 66%

Standard of lifestyle
APAC: 64%

HOW DOES TECHNOLOGY SUPPORT OFFICE WORKERS BASED IN MAJOR CITIES?

76%

Able to work across all my devices
APAC: 68%

24X7 availability
APAC: 60%

Collaborate with my team
APAC: 48%

Automate menial tasks to save time
APAC: 24%
TOP FACTORS CREATING IDEAL PHYSICAL SPACE AT WORK

- State of the art technology for my work station
  APAC: 51%

- Technology to help connect me to colleagues
  APAC: 45%

- Lounge and relaxation areas
  APAC: 45%

IMPACT OF YOUNGER PEOPLE IN THE WORKPLACE

1. Increased focus on creative thinking and innovative projects
   APAC Rank: 1
2. Extensive use of social media
   APAC Rank: 3
3. Implementation of technology to break down legacy company processes for onboarding, communication, etc.
   APAC Rank: 5
**MOST IMPORTANT THINGS TECHNOLOGY ENABLES FOR THE OFFICE WORKERS**

1. **Better efficiency**  
   APAC Rank: 1

2. **Improved productivity**  
   APAC Rank: 3

3. **Enhanced quality of work**  
   APAC Rank: 2

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**IMPACT OF ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING ON OFFICE WORKERS**

- **Somewhat concerned**: 59%  
  APAC: 46%

- **Not concerned**: 4%  
  APAC: 21%

- **Extremely concerned**: 35%  
  APAC: 27%

- **Not sure**: 2%  
  APAC: 6%

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**INTEREST IN USING ARTIFICIAL INTELLIGENCE TO PERFORM MUNDANE TASKS**

- **Very / somewhat interested**: 96%  
  APAC: 93%

- **Very interested**: 44%  
  APAC: 44%

- **Somewhat interested**: 52%  
  APAC: 44%

- **Not at all interested**: 5%  
  APAC: 6%
WHAT WOULD THE OFFICE WORKERS DO IF THEY WON A LOTTERY?

- **37%** Continue doing the job in the same capacity
- **33%** Continue doing the job but work fewer hours
- **3%** Stop working entirely
- **27%** Pursue dream career

MAIN FACTORS FOR CHOOSING TO LIVE IN A MAJOR CITY

- **Infrastructure**
  - APAC: 65%
  - APAC: 64%
  - APAC: 60%

HOW DOES TECHNOLOGY SUPPORT OFFICE WORKERS BASED IN MAJOR CITIES?

- **78%** Able to work across all my devices
- **58%** Standard of lifestyle
  - APAC: 64%
  - APAC: 66%
  - APAC: 58%
- **52%** Availability of jobs
  - APAC: 60%

Additional factors:
- **24X7 availability**
  - APAC: 60%
  - APAC: 49%
- **Collaborate with my team**
  - APAC: 48%
  - APAC: 40%
- **Automate menial tasks to save time**
  - APAC: 40%
  - APAC: 33%
TOP FACTORS CREATING IDEAL PHYSICAL SPACE AT WORK

1. Technology to help connect me to colleagues
   - APAC: 45%
   - Korea: 55%

2. State of the art technology for my work station
   - APAC: 51%
   - Korea: 37%

3. Lounge and relaxation areas
   - APAC: 38%
   - Korea: 36%

IMPACT OF YOUNGER PEOPLE IN THE WORKPLACE

1. Increased focus on creative thinking and innovative projects
   - APAC Rank: 1

2. Extensive use of social media
   - APAC Rank: 3

3. Open-minded and diverse work environment
   - APAC Rank: 2
MOST IMPORTANT THINGS TECHNOLOGY ENABLES FOR THE OFFICE WORKERS

1. Enhanced quality of work
   (APAC Rank: 2)

2. Better efficiency
   (APAC Rank: 1)

3. Improved productivity
   (APAC Rank: 3)

IMPACT OF ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING ON OFFICE WORKERS

53% Somewhat concerned
   (APAC: 46%)

18% Not concerned
   (APAC: 21%)

25% Extremely concerned
   (APAC: 27%)

4% Not sure
   (APAC: 6%)

INTEREST IN USING ARTIFICIAL INTELLIGENCE TO PERFORM MUNDANE TASKS

95% Very / somewhat interested
   (APAC: 93%)

38% Very interested
   (APAC: 44%)

57% Somewhat interested
   (APAC: 49%)

5% Not at all interested
   (APAC: 6%)
DEMOGRAPHICS

AGE GROUP

- 16% 18 to 24
- 36% 25 to 34
- 37% 35 to 54
- 11% 55 or above

MALE: FEMALE RATIO

- Male 60%
- Female 40%
### Demographics

#### Industry
- Healthcare: 4%
- Manufacturing: 9%
- Education: 7%
- Banking / Finance / Insurance: 6%
- Technology / Telecom: 22%
- Media & Entertainment: 15%
- Government: 4%
- Retail / eCommerce: 10%
- Travel & Hospitality: 2%
- Other: 20%

#### Company Performance
- Superior business performance: 30%
- Average business performance: 59%
- Below average business performance: 11%

#### Highest Level Education
- School: 14%
- Graduated college: 53%
- Post-graduate degree: 29%
- Prefer not to answer: 5%

#### Household Income
- $100,000 or more: 15%
- $50,000 - $99,999: 15%
- $10,000 - $49,999: 31%
- Under $10,000: 12%
- Don’t Know: 5%
- Prefer not to disclose: 21%