

Future Workforce Study

Canada



Key Findings



Canada findings overview

Globally, we found that the workforce is on the verge of change.

Not a revolution, but a productivity evolution as advances in communications and workplace technologies combine with lifestyle changes to create a workforce that is more mobile, capable and productive.

However, Canada is an outlier to this global story.

Like other markets, they agree their workplaces aren't smart enough and pale in comparison to the technology they use at home. However, unlike most other markets, they don't seem to mind this and **do not seem to be in any hurry to embrace the changing technological landscape even if it means increased productivity.**



1

Canadian employees say their offices are not smart enough and workplace technology is lagging.

42%

2 in 5 Canadians say their workspaces are not smart enough; twice as many Canadians say their workspaces update tech less than others as say their workspaces update tech more. Plus, 35% say their home tech is more cutting edge than work tech, and they are nearly 4 times as likely to list technology as what they're least satisfied with as what they're most satisfied with at work.



2

However, they do not seem to mind or expect it to change soon.



45%

of Canadians favor low-tech office perks over high-tech perks (compared to 29% globally), and just 39% expect to be working in a smart office in the next five years (compared to 57% globally).



3

Canadians still strongly prefer traditional face to face communication as few employees work remotely.

25%

With just 1 in 4 working remotely, Canadians strongly prefer face to face over remote conversations. 9 in 10 Canadians say in-person conversations are necessary at work, and over half do not believe that remote communication tech will replace face to face conversations.



4

They are hesitant to embrace global technological advances even if it means more productivity.

50%

Canadians are significantly less likely to embrace AR/VR when compared globally (50% v 66% globally), and are split on whether AI will make their jobs easier (47% v 62% globally). But Canadians have embraced the sharing economy, with 3 in 5 planning to participate in it in the coming year.



5

But, like elsewhere, Millennials are pushing the envelope and look to bring the workplace evolution to Canada.



46%

Millennials are more likely to expect to work in a smart office in the next 5 years (46%), more likely to say the workspace is becoming more collaborative (68%), more likely to say their work tech currently makes their job easier (75%), more likely to say AI will make their jobs easier (52%).



Key Supporting Slides



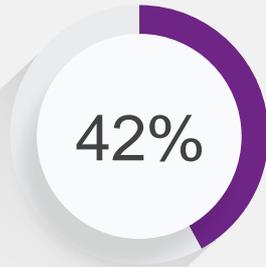
1

Canadian employees say their offices are not smart enough and workplace technology is lagging.

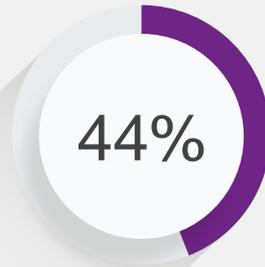


2 in 5 Canadian employees say their workspaces are not smart enough; only 4% say they're too smart

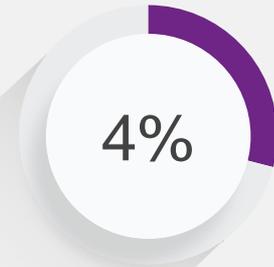
When thinking about your current workspace, is it...?



Not smart enough



As smart as I want it to be

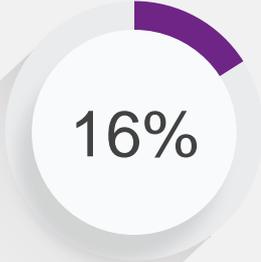


Too smart



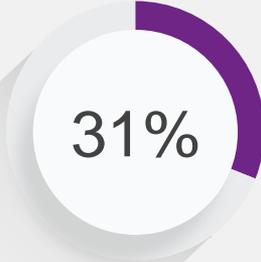
By a 2:1 ratio, Canadian employees think their workspaces update tech less than others

As far as you know, would you say your workspace updates its technology... (Among All)



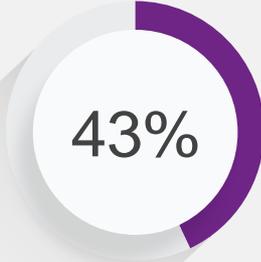
16%

More than
other workspaces



31%

Less than
other workspaces



43%

Same as
other workspaces



And are more likely to say home technology is more cutting edge than work technology

More cutting edge at home:

Small Business – 28%

Medium Business – 35%

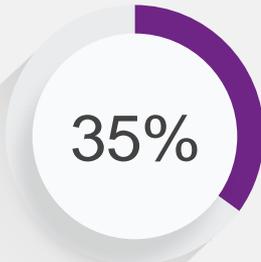
Large Enterprise – 41%

*10% of Respondents said "Don't know"



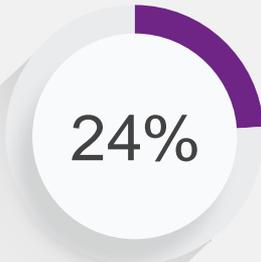
And are more likely to say home technology is more cutting edge than work technology

Compared to the workspace, is the technology you use at home...



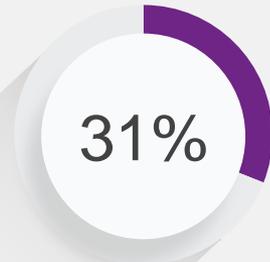
35%

Home tech is
more cutting edge



24%

Home tech is
less cutting edge



31%

Home and work tech
on par

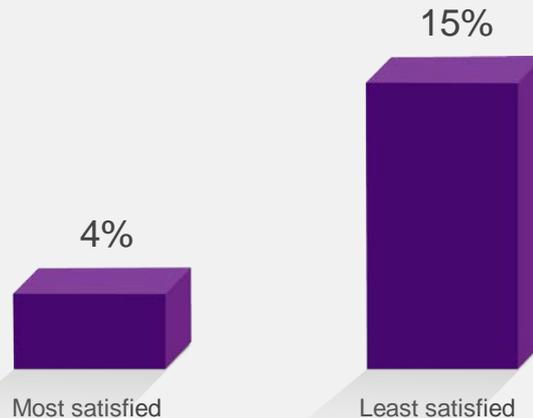
*10% of Respondents said "Don't know"



Canadian employees are 4x as likely to list workplace technology as something they're least satisfied with than something they're most satisfied with in their jobs

Please indicate which two aspects of your job you are most satisfied/least satisfied with. (Among All)

Technology my work provides me



*17% of Respondents said "Don't know"



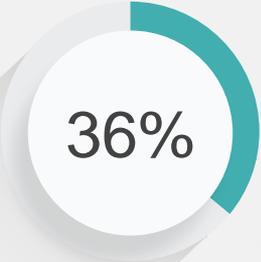
2

However, they do not seem to mind or expect it to change soon.



Despite not thinking their workplaces are smart enough, Canadian employees prefer low-tech perks to high-tech perks in the office

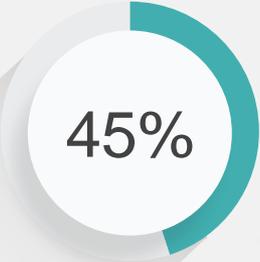
Which of the following would you rather have in the workspace? (Among All)



36%

High-tech perks

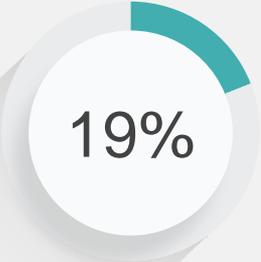
Like Internet of Things, Augmented/virtual reality or AI-assisted features



45%

Low-tech perks

like a ping pong table, free food or an office dog



19%

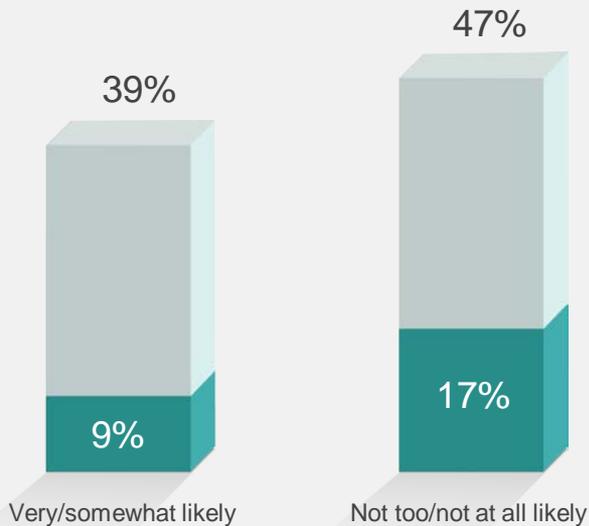
Don't know

Only 29% of global employees prefer low-tech perks.



And 47% think it's unlikely they'll be working in a smart office in the 5 years compared to 39% who think it's likely

How likely do you think you will be working in a 'smart' office that uses the Internet of Things in the next five years?



Total Likely:
Global All – 57%

*Darker colors indicate stronger intensity of answer
**13% of Respondents said "Don't know"



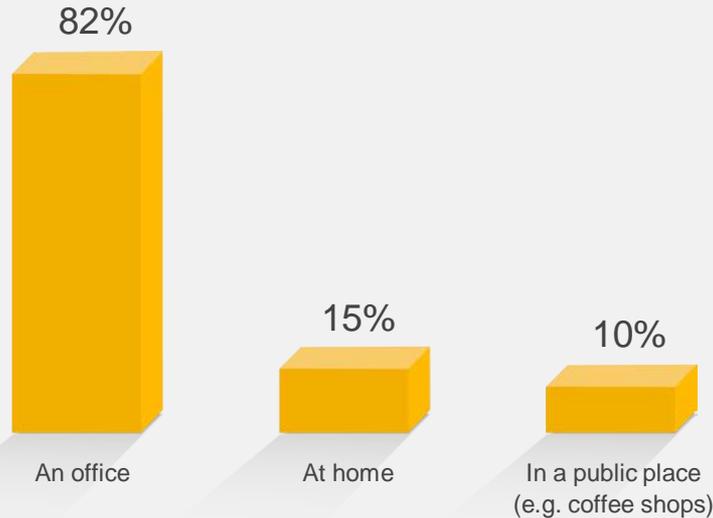
3

Canadians still strongly prefer traditional face to face communication as few employees work remotely.



Just 1 in 4 Canadians currently work outside of the office at least a few times a week

*How often, if at all, do you work from the following locations?
(Among all; showing every day + a few times a week)*

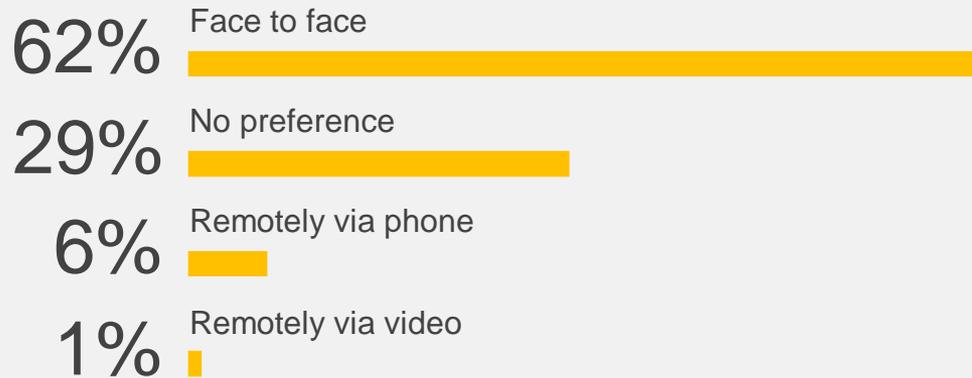


25% Out of Office



Face to face conversations are preferred in Canada

And would you rather exchange conversation with a colleague face to face or remotely?



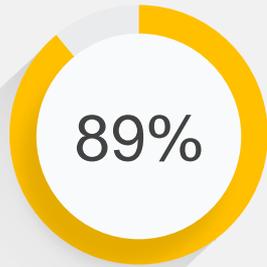
Remotely or
no preference:

Global All – 41%



And are overwhelmingly seen as necessary to foster a productive work environment

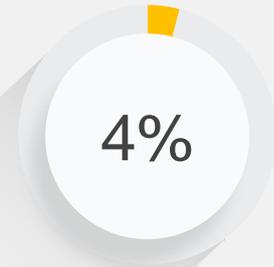
Which of the following is closer to your view?



In-person interactions with colleagues are **necessary** to foster a productive and professional work environment



In-person interactions with colleagues at work are **unnecessary and inefficient**



Don't know



Canadians do not believe that remote communication tech will replace face to face conversations

Public employees, Millennials, and office workers in Canada are the least likely to agree with a trend toward more communication through technology.

Most Likely to Disagree:

Public Employees – 58%

Millennials – 54%

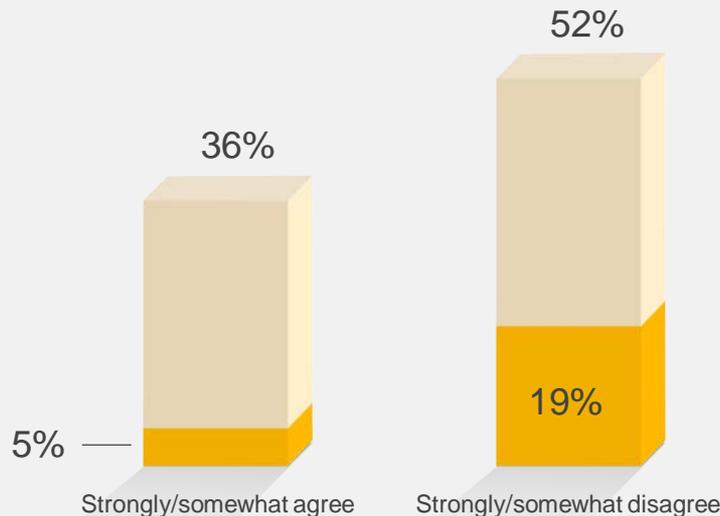
Office Employees – 53%



Canadians do not believe that remote communication tech will replace face to face conversations

How much do you agree or disagree with the following statement?

Remote teams and better communication technology will make face to face communication obsolete.



*Darker colors indicate stronger intensity of answer
**11% of Respondents said "Don't know"



4

They are hesitant to embrace global technological advances even if it means more productivity.



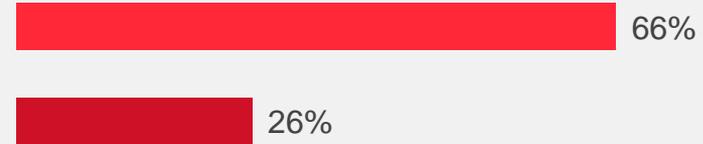
Half of Canadian employees are willing to embrace AR/VR at work, significantly less than the global average

How willing would you be to use augmented/virtual reality products in your professional life?

Canada



Global All



 Willing
 Not Willing



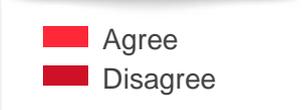
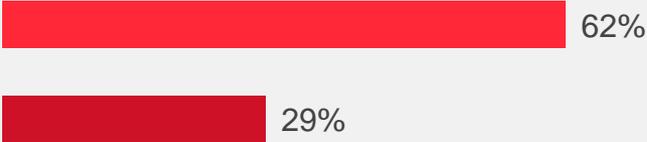
Canadians are split on whether AI will make jobs easier, though global employees overwhelmingly agree it will

Thinking about your own job, do you agree or disagree that it could be made easier with the assistance of artificial intelligence?

Canada



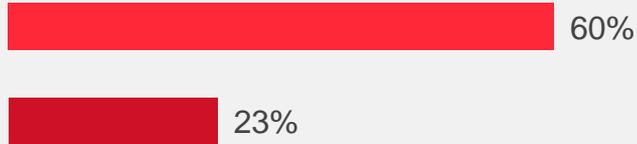
Global All



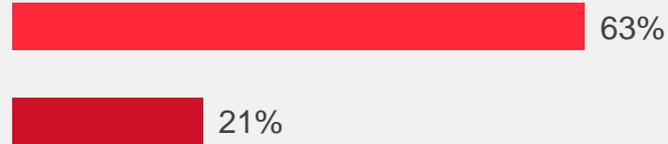
The exception is the sharing economy, which Canadian employees have embraced at the same levels as global employees

How, if at all, do you plan on participating in the sharing economy in 2017?

Canada



Global All



 Will Participate
 Won't Participate

**18% of Respondents said "Don't know"



5

But, like elsewhere, Millennials are pushing the envelope and look to bring the workplace evolution to Canada.



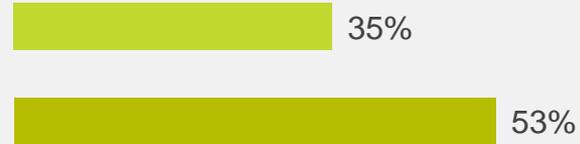
Millennials are more optimistic that older employees that they will work in smart offices in the coming years

How likely do you think you will be working in a 'smart' office that uses the Internet of Things in the next five years?

Millennials



Non-Millennials



 Total Likely
 Total Unlikely

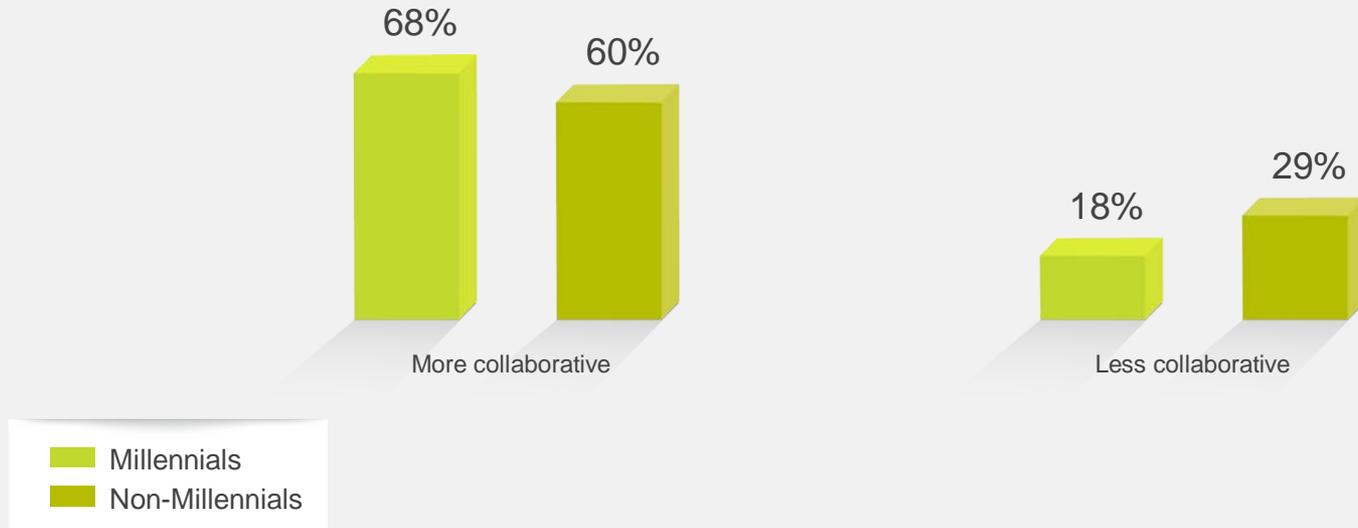
*16 and 12% of Respondents said "Don't know"



Millennials are more likely to say the workspace has become more collaborative

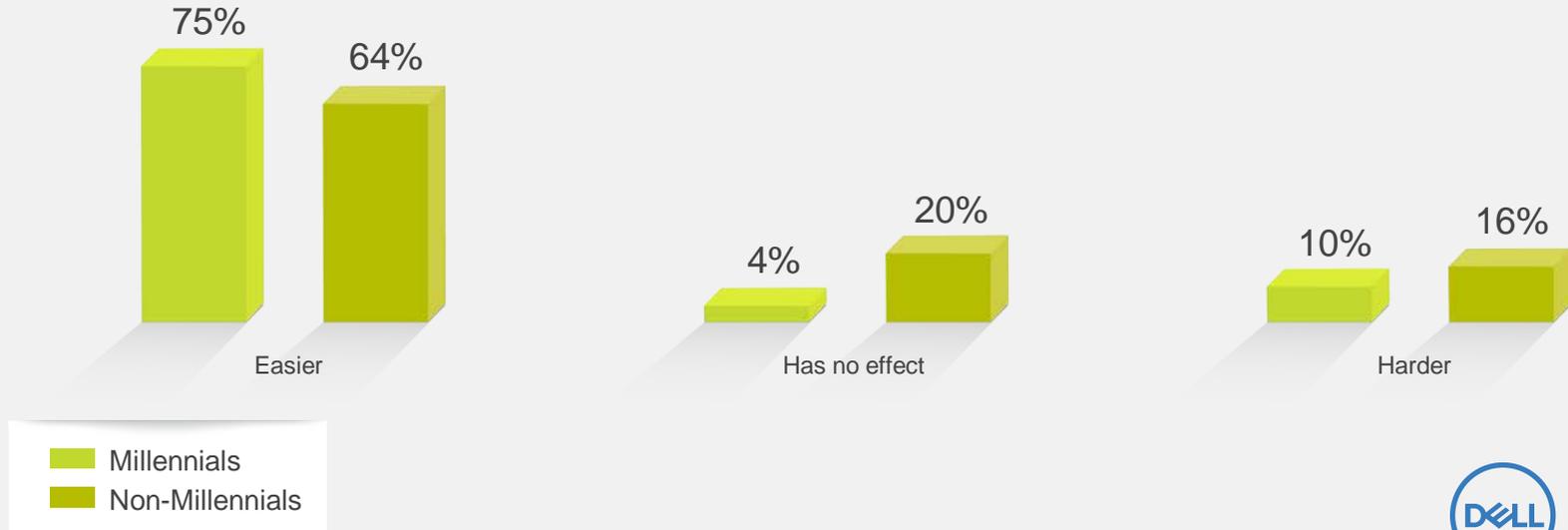
Non-Millennials are less likely to agree about this trend toward collaboration.

Are people generally more or less collaborative in the workspace than they used to be?



Millennials are more likely to say the technology they use at work makes their responsibilities easier

Generally speaking, does the technology you use at work make your responsibilities...

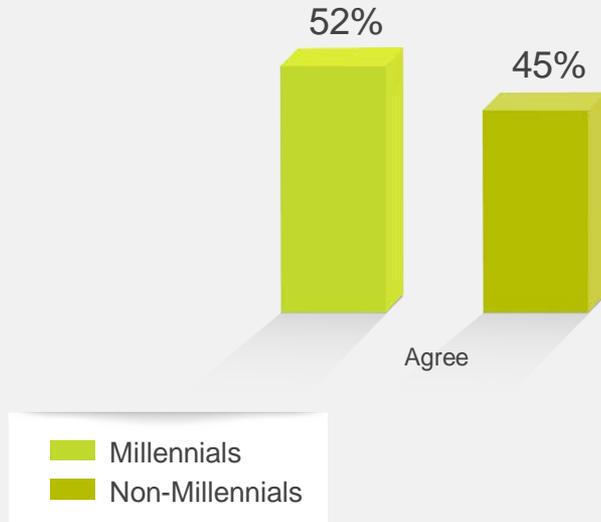


*12% of Respondents said "Don't know"

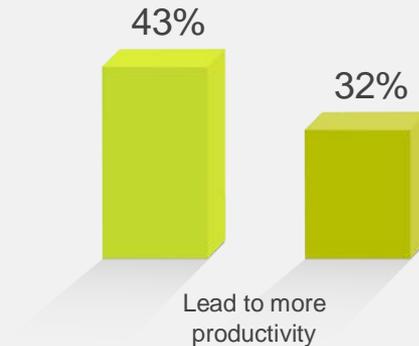


Millennials are more open to AI, with over half believing it would make their own job easier

Thinking about your own job, do you agree or disagree that it could be made easier with the assistance of artificial intelligence?



Artificial intelligence will lead to more productivity in the workplace.



Methodology



Methodology

Penn Schoen Berland (PSB) conducted 300 online interviews in Canada between April 27 and May 20, 2016 among Canadian Employees. Throughout the report, CA Employees are referred to as 'Canadians'. The report primarily analyzes the following groups:

Audience	Definition	N Size	MoE (%)
Canadian Employees	Canadian adults who work more than 35 hours a week and work in one of seven target industries: Education, Government, Financial Services, Healthcare, Manufacturing, Media & Entertainment, and Retail	300	± 5.66
Men	Male Canadian Employees	122	± 8.87
Women	Female Canadian Employees	174	± 7.43
Millennials (18-34)	Canadian Employees Age 18-34	103	± 9.66
35+	Canadian Employees Age 35+	197	± 6.98
Small Business	Canadian Employees who work for a company or organization with less than 100 people	67	± 11.97
Medium Business	Canadian Employees who work for a company or organization with between 100 and 5000 people	152	± 7.95
Large Enterprise	Canadian Employees who work for a company or organization with more than 5000 people	82	± 10.82
Office Employee	Canadian Employees who work in an office at least a few times a week	244	± 6.27
Remote Working Employee	Canadian Employees who work either at home or in a public place at least a few times a week	64	± 12.25



Audience Summary: Millennials (18-34) vs. 35+

Key Difference

Collaboration is on the rise

Data

Millennials (18-34) are most likely to recognize that collaboration in the workplace is growing; 68% say that the workspace is more collaborative than it was (vs. 60% of 35+)

Tech impacts job retention and selection

21% of millennials (18-34) would be likely to quit a job with substandard tech (vs. 15% of 35+), and 61% say that a new job's available technology has a lot of impact on their decision whether or not to take the job (vs 54% of 35+)

Robots will make jobs easier

Over half (52%) of Canadian millennials say AI will make their jobs easier, compared to 45% of those over 35, and are more likely to see AI as performing an advisor role (23% vs. 14% of 35+)

Workplaces of the future will be 'smart'

46% of Canadian millennials expect that they'll be working in a smart workplace that uses IoT in the next five years, vs. 35% of 35+



