

riverbed | Aternity

Hybrid Work Global Survey 2021

Executive insights on creating a
high-performing hybrid workplace



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Introduction

Organizations are undergoing profound changes because of the global pandemic. They are accelerating their digital transformations to respond to a growing demand for digital services and virtual interactions. They are migrating their workloads, applications and infrastructure to the cloud at a record pace. And they are enabling and supporting a remote workforce with capabilities and technologies that are now considered mission critical.

While the concept of remote work is not new, the pandemic forced organizations to implement large-scale work-from-home capabilities—and fast. Now, as both employers and employees consider returning to the office, it's clear that expectations have changed. The new workplace will be more hybrid and flexible, enabling employees to work and collaborate both virtually and physically.

To assess the benefits and challenges of a hybrid workplace and the role technology plays in enabling or impacting its long-term success, Riverbed | Aternity conducted a global survey in September 2021 of nearly 1,500 business leaders comprised of 750 business decision makers (BDMs) and 738 IT decision makers (ITDMs). The Riverbed | Aternity Hybrid Work Global Survey 2021, conducted by Sapio Research, included organizations with revenue above \$500M USD annually in the United States, United Kingdom, France, Germany, Australia, Switzerland, United Arab Emirates, and the Netherlands. Industry sectors included: finance/insurance; public sector/government; healthcare/pharma; manufacturing; oil and gas; retail; and professional services.

Current State

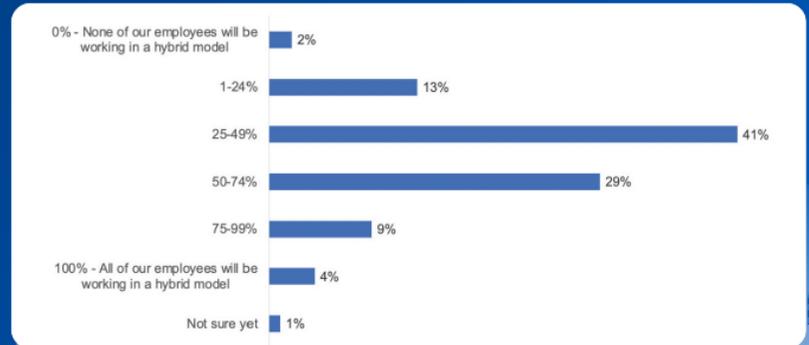
The pandemic has accelerated digital transformation and the adoption of digital technologies to support new ways of operating and interacting with customers, employees and partners. According to the survey, **85%** of organizations are accelerating their digital strategy, including increasing SaaS and cloud adoption.

The pandemic has also been a catalyst for workplace transformation. Impelled by how quickly employees adapted to virtual environments, productivity gains, and substantial cost savings, organizations are now very comfortable with employees working remotely and believe there are many benefits to adopting a hybrid work model.

Globally, the survey found **97%** of respondents are comfortable with employees working hybrid. The vast majority (**83%**) say that at least **25%** of their workforce will be working in a

hybrid model post pandemic and **42%** say half or more of their workforce will be hybrid. Comparatively, in the *Riverbed Future of Work Survey* conducted in June 2020, only **30%** of respondents believed **25%** or more and only **16%** believed **50%** or more of their workforce would be working remotely.

In your opinion, what percentage of your workforce will be working in a hybrid model post the COVID-19 pandemic? Select one.



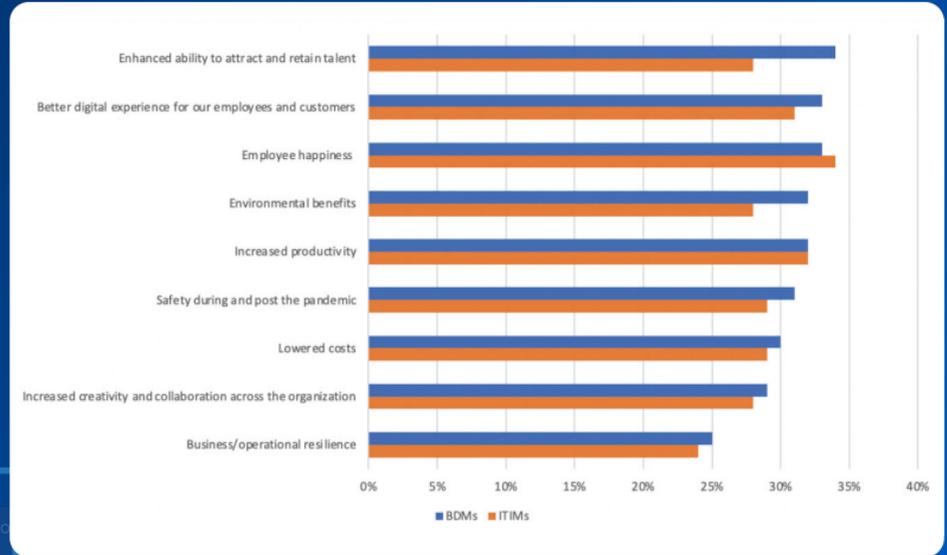
94% agree a hybrid work environment helps recruit talent and remain competitive in future, with **45%** of BDMs and **50%** of ITDMs saying yes, significantly. When talent plans are no longer restricted by location or a candidate's willingness to move, employers can source the best talent from anywhere in the world and reduce expenses associated with relocation and office setup. Hybrid work models also provide more opportunities for job seekers, who perhaps live in rural or more remote areas of the world, to pursue roles that were once off limits to them because of where they call home.

94% agree a hybrid work environment helps recruit talent and remain competitive in future



An enhanced ability to attract and retain talent (34%) is just one of many top benefits associated with hybrid work models. BDMs also selected better digital experiences for employees and customers (33%), employee happiness (33%), environmental benefits (32%), and increased productivity (32%) among their top five benefits.

What do you believe the biggest benefits will be to your organization as it relates to adopting a hybrid work model? Select your top five.



The societal and environmental impact of hybrid work continues to be studied, but whether it's better air quality, less waste, time gained or achieving a more harmonious work/life balance—a resounding **84%** of survey respondents believe hybrid work will have a lasting and positive impact on society and the world.

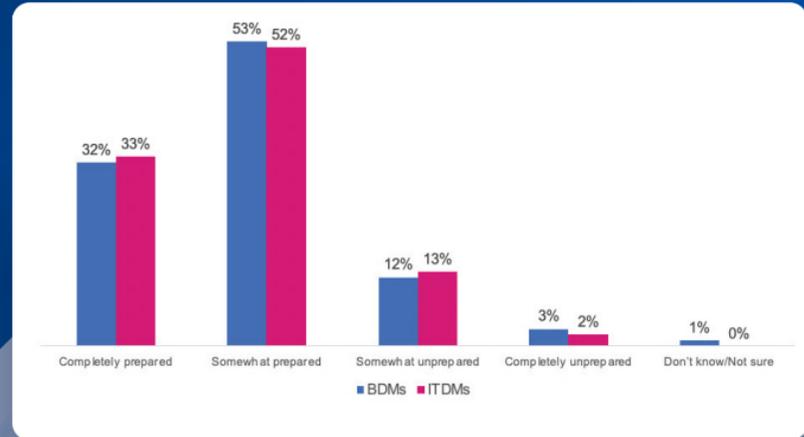


Barriers to Success

The survey found that **85%** of respondents believe their leadership team is taking a progressive stance on hybrid work and ensuring that their IT infrastructure is updated to accommodate the ways in which employees want to work in the future.

However, the survey also revealed that organizations are not fully prepared to support a significant and permanent shift to hybrid work and that there are several barriers that need to be addressed. From a technology standpoint, only **32%** of BDMs and **33%** of ITDMs believe they are completely prepared to support long-term hybrid work.

How prepared or unprepared do you believe your organization is, from a technology standpoint, to support long-term hybrid work?

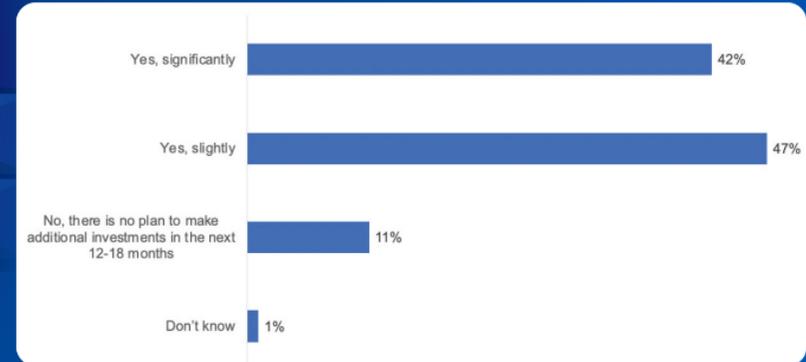


While **49%** of ITDMs in the UAE report being completely prepared for long-term hybrid work, only **16%** in the Netherlands feel the same way. According to the survey, the finance sector is most prepared for hybrid work, with **41%** of BDMs saying they are completely compared, in contrast to just **20%** of public sector BDMs.



To improve their state of readiness, **89%** of organizations plan to invest in technology to support a hybrid workforce in the next 12-18 months, and **42%** plan to make significant investments. This is up from last year's *Riverbed Future of Work Survey*, in which **61%** of organizations planned to invest in technology to support remote working performance within 12 months.

Will you be investing in technology to support a hybrid workforce in the next 12-18 months?

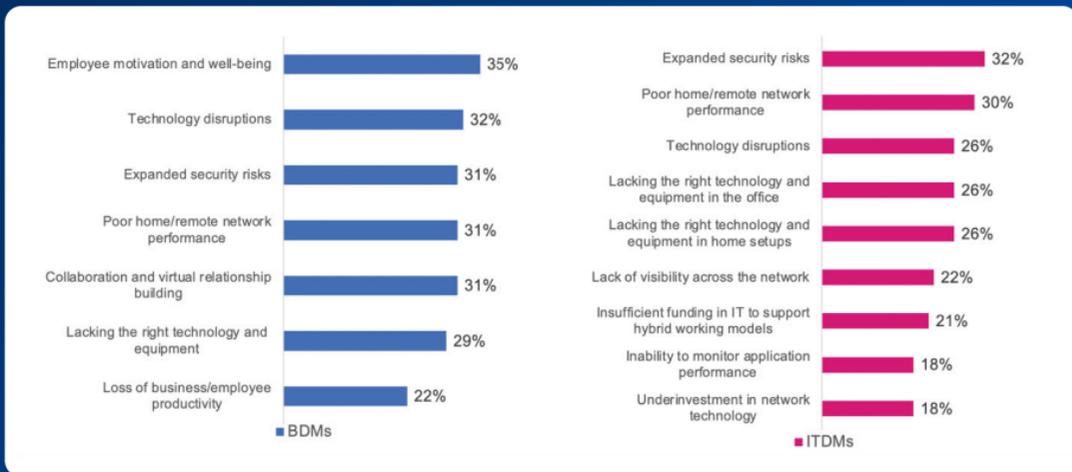


98% of those surveyed in United Arab Emirates plan to invest in technology to support a hybrid workforce in the next 12-18 months, and **57%** plan to invest significantly.

BDMs believe their organizations' biggest barriers to adopting a sustainable hybrid work model are employee motivation and well-being (35%), followed by technology disruptions (32%) and expanded security risks (31%). ITDMs believe the biggest barrier is expanded security risks (32%), followed by poor home/remote network performance (30%), technology disruptions (26%) and lacking the right technology and equipment in office and home setups (26%).

BDMs: What do you believe the biggest barriers are to adopting a sustainable hybrid working model in your organization? Select your top three.

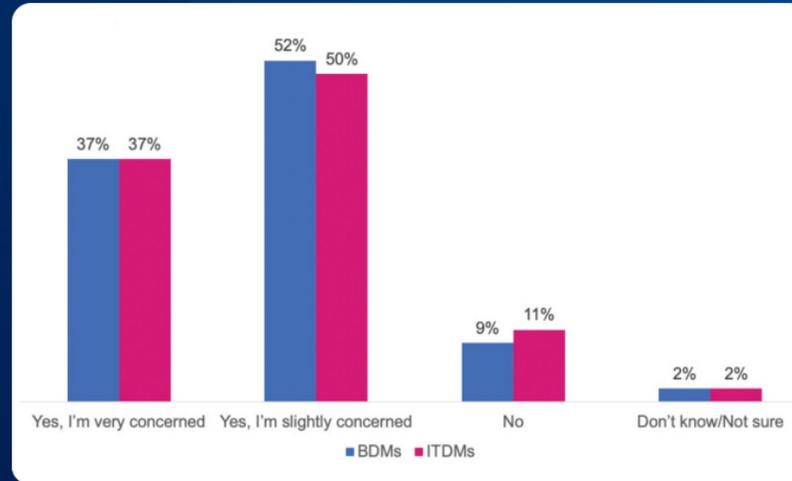
ITDMs: What do you believe the biggest technological barriers are to adopting a sustainable hybrid working model in your organization? Select your top three.



The pandemic has reinforced the importance of employee well-being in the workplace. Remote work can be isolating and when physical boundaries between work and home are removed, employees may find it difficult to “turn off.” Even the most employee-centric organizations must reassess employee mental health and proactively monitor for burnout.

Another major area of concern among business and IT leaders is their organization's ability to deliver a consistent, reliable digital experience regardless of where employees work. The survey found that **88%** of respondents are concerned that there may be a disparity in network and application performance between in-office and remote employees.

Are you concerned that as employees return to offices, there may be a disparity in network and application performance for hybrid or remote employees versus in-office employees?

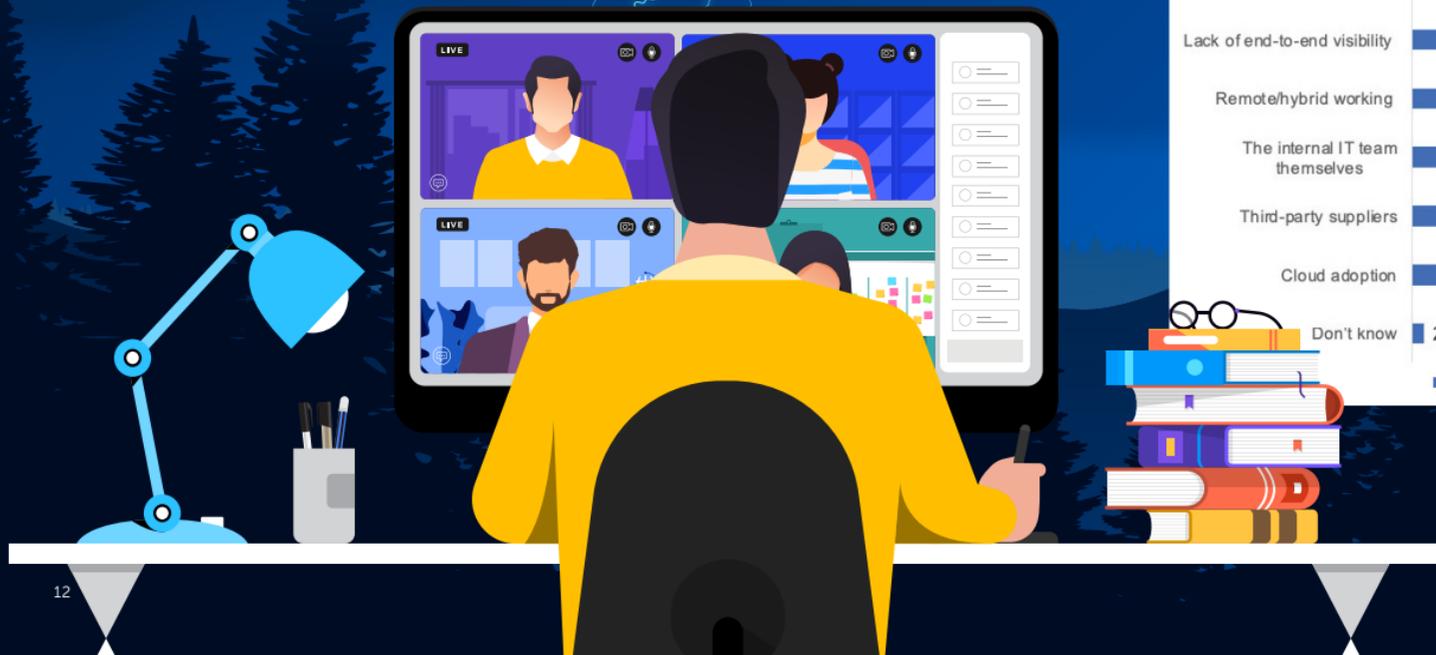
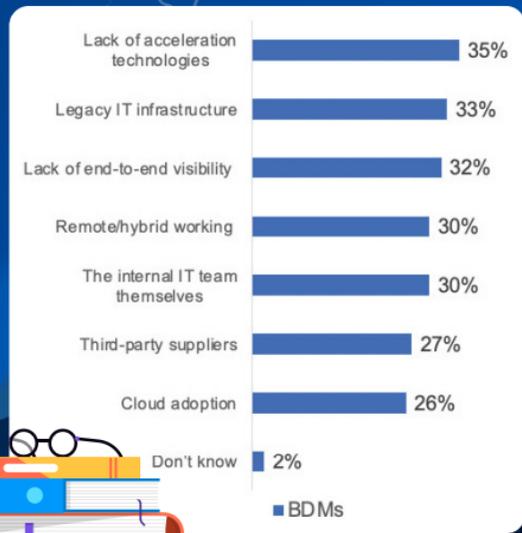


Almost half (**46%**) of ITDMs in the retail sector are very concerned there may be a disparity in network and application performance for remote employees versus in-office employees. More than **52%** of those surveyed in the UAE are very concerned of the disparity, while only **20%** of those in Germany said they were very concerned.



When technology disruptions occur in the office or while working remotely, more than **80%** of BDMs believe it negatively affects them, their teams, and employee job satisfaction and blame lack of acceleration technologies (**35%**), legacy IT infrastructure (**33%**), and lack of end-to-end visibility (**32%**) for poor network or application performance.

BDMs: When it occurs, who or what do you believe is to blame for poor network or application performance in your organization? Select all that apply.



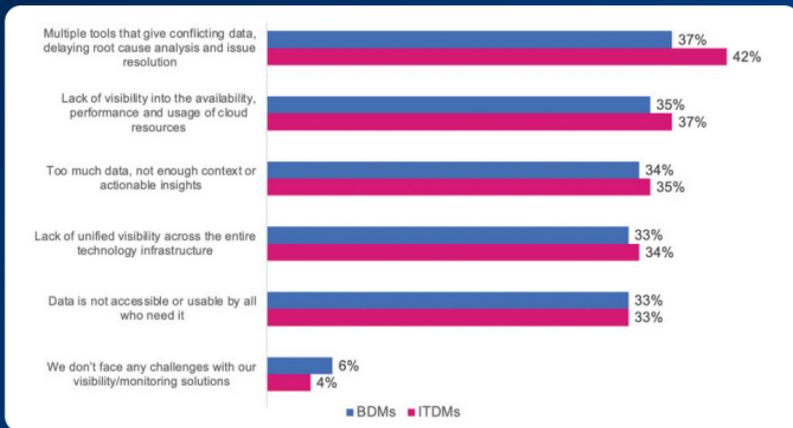
Both BDMs and ITDMs recognize that security risks increase in highly distributed, hybrid work environments, and that without end-to-end visibility, IT teams are blind to cybersecurity threats. In fact, **82%** of respondents believe the greatest risk to their organization's cybersecurity is not having full visibility over the entire network. Furthermore, **93%** of respondents believe it is important to have full end-to-end visibility (networks, applications, cloud services, end-user devices) to enable IT teams to better identify, remediate and protect against cybersecurity threats.

There's no question that BDMs and ITDMs consider visibility to be essential to the future of work. However, **95%** percent of respondents report their organizations face visibility and monitoring challenges in their current IT environment and **57%** believe gaining end-to-end visibility in a hybrid work environment is even more challenging.

57% gaining end-to-end visibility in a hybrid work environment is even more challenging



What challenges does your organization face with visibility/monitoring solutions in your current IT environment? Select all that apply.



More than half (52%) of BDMs in Australia believe lack of visibility into the availability, performance and usage of cloud resources is the biggest visibility/monitoring challenge compared to just 20% of BDMs in the Netherlands.

BDMs and ITDMs consider the biggest challenge their organisations face with visibility and monitoring solutions to be multiple tools that give conflicting data, delaying root cause analysis and issue resolution.

The issue of too many monitoring tools is often caused by the siloed nature of IT organizations. Each technology tier (network, application, cloud, server, database, storage, etc.) is managed by a different team, each with their own set of monitoring tools. And because there is typically little integration between these tools, finding the root cause of performance problems can be like finding a needle in a haystack.

To address the cross-domain nature of troubleshooting, many organizations establish war rooms. But when each domain brings conflicting data, war room discussions turn into unproductive finger-pointing sessions that waste valuable resources and time. This problem becomes worse as organizations accelerate adoption of third-party cloud services for which they have little visibility or control over availability, performance and usage.

Another challenge exposed by the survey relates to data. While more valuable than ever, it's becoming extremely challenging to correlate and contextualize the increasing volume, variety and velocity of data to make timely and effective decisions.

The survey found that 77% of BDMs and 73% of ITDMs agree that their organization struggles to glean actionable insights from data that is generated by their technology infrastructure.

In the finance/insurance industry, this challenge is further heightened, with 82% saying they struggle to glean actionable insights from their data. Geographically, this challenge is highest in the UAE and Australia, at 87% and 79%, respectively.



The term 'observability', first used in the context of control theory, is gaining traction as the next evolution of IT monitoring. An effective observability system captures telemetry from the entire digital ecosystem and uses AI and ML to transform data into actionable insights for faster decision-making and issue resolution.



Key Investment Areas

When it comes to priorities and investments, it's evident that respondents understand that workplace transformation and IT modernization go hand in hand. To gain the maximum benefits from hybrid work, **86%** of respondents agree that companies must increase investments into modernizing their network infrastructure. In addition, **85%** of respondents believe there should be more investment into performance and acceleration solutions that will help increase productivity and allow for a better customer and employee experience.

As stated earlier in the report, **89%** of organizations plan to invest in technology to support a hybrid workforce in the next 12-18 months. When looking at specific investments within the next 12-18 months, **38%** of BDMs think their company will undertake better visibility of network and

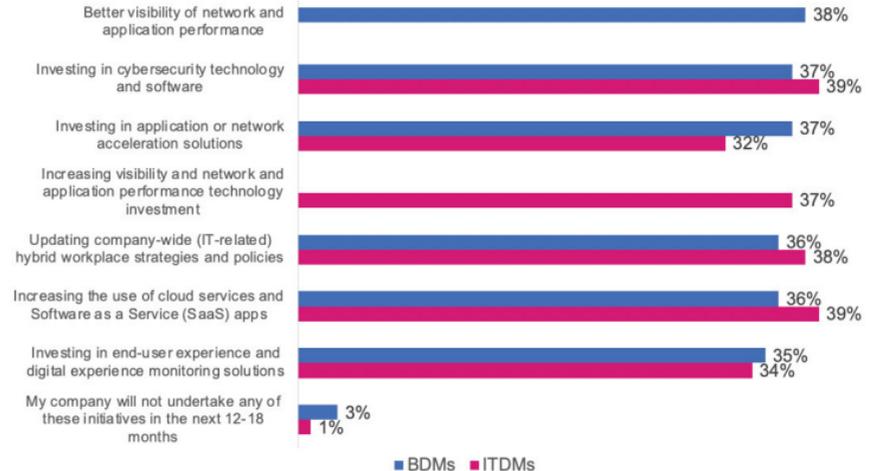
application performance to support remote workforce performance; **39%** of ITDMs think their company will invest in cybersecurity technology and software, and increase the use of cloud services and SaaS applications.





Digital experience monitoring enables organizations to measure remote employee experience—the quality of their interactions with collaboration apps like Microsoft 365, Teams, and Zoom, as well as the health of end users' devices, home Wi-Fi and VPN performance.

Which of the following technology initiatives, if any, do you think your company will undertake in the next 12-18 months to better support remote workforce performance? Select all that apply.



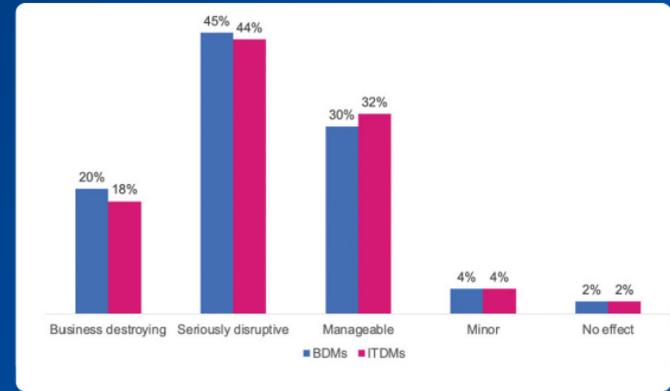
47% of ITDMs in Australia think their company will invest in end-user experience and digital experience monitoring solutions.

Investments in cybersecurity technology and software is ranked as the top initiative for BDMs in the United Kingdom (47%) as well as ITDMs in the United States (49%) and Switzerland (48%). Related to cybersecurity, organizations are prioritizing investments in data encryption and privacy (39%), network security (38%) and employee cybersecurity awareness programs (34%).

Underinvesting in technologies that ensure IT services are performing and secure can have severe consequences. **Over three-fifths** of BDMs and ITDMs say it would be seriously disruptive or business destroying if it came to light that they suffered a cybersecurity breach because of underinvestment in visibility technology.



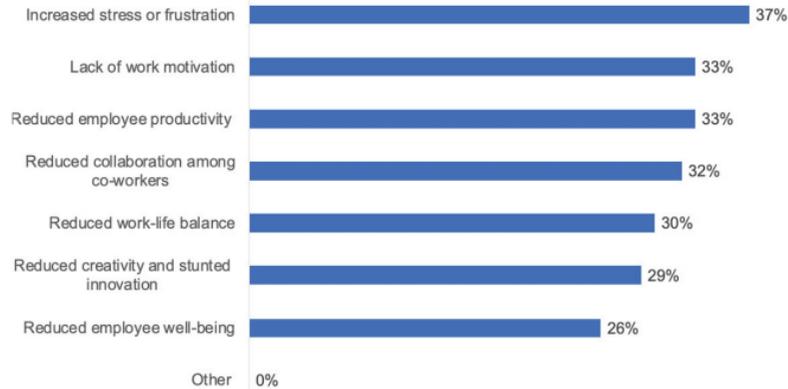
In your opinion, what would the impact be on your organization if it came to light that you suffered a cybersecurity breach because of underinvestment in visibility technology? Select one.



31% of BDMs in the oil and gas sector and **32%** of ITDMs in the United Arab Emirates believe it would be business destroying if their organization suffered a cybersecurity breach because of underinvestment in visibility technology.

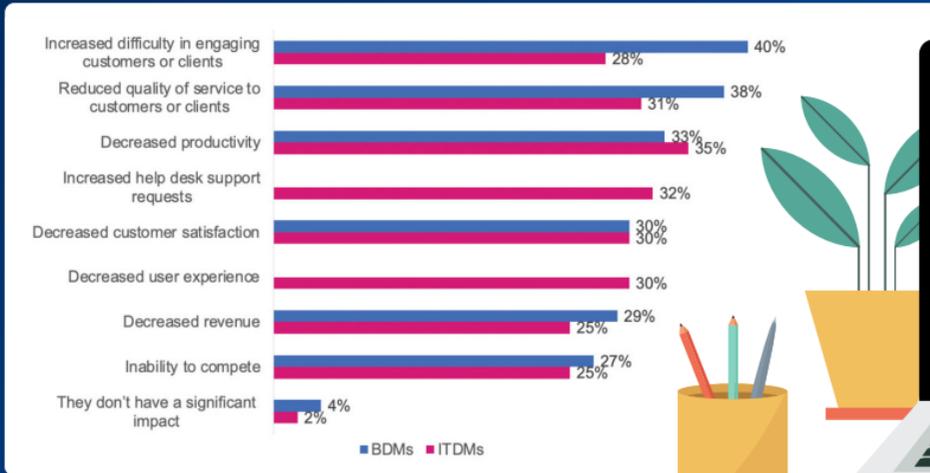
From an employee experience perspective, both business and IT decision makers believe technology performance issues cause increased stress or frustration (37%), lack of work motivation (33%), reduced employee productivity (33%), reduced collaboration among co-workers (32%) and reduced work-life balance (30%).

How do technology performance issues impact the employee experience?
Select all that apply.



From a business perspective, almost 9 in 10 (**88%**) respondents believe that network and application performance has held their organization back from productivity, innovation, and growth. BDMs say performance issues increase difficulty in engaging customers or clients (**40%**), reduce quality of service to customers or clients (**38%**) and decrease productivity (**33%**). ITDMs also say performance issues increase help desk support requests (**32%**) and decrease user experience and customer satisfaction (**30%**).

How do network and application performance issues impact the overall success of your company? Select all that apply.



Conclusion

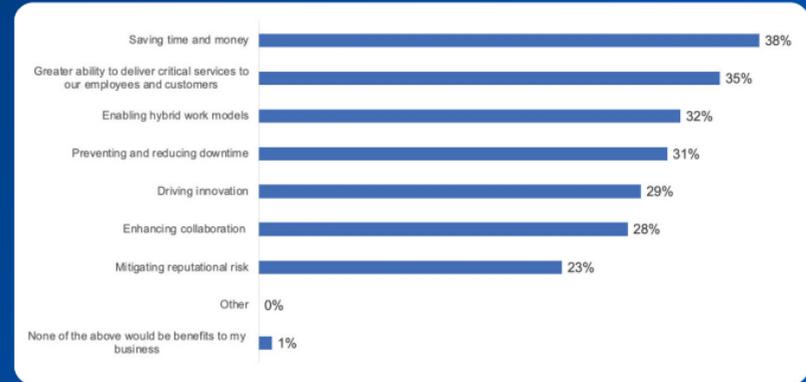
This report has confirmed that the future of work is clearly hybrid, however most organizations are not yet completely prepared to support long-term remote or hybrid work. It has also confirmed the critical role technology plays and the importance of modernizing IT systems to improve performance, security, and the digital employee experience. In fact, **89%** of organizations plan to invest in technology to support a hybrid workforce in the next 12-18 months.

When networks and applications operate at peak performance, so do employees and the business. Both BDMs and ITDMs recognize the benefits of optimal performance—saving time and money, driving innovation, enhancing collaboration, and mitigating reputational risk to name a few. Eighty five percent of survey respondents also recognize that having visibility across the entire digital experience is critical to their organizations' digital strategy and hybrid work environment.

And while only **32%** of BDMs believe they are completely prepared from a technology standpoint to support long-term

hybrid work, 89% of organizations plan to invest in technology to support a hybrid workforce in the next 12-18 months.

What, in your opinion, would the biggest benefits be to your organization if its network and application performance was optimal? Select your top three.



Eighty-five percent of survey respondents also recognize that having visibility across the entire digital experience is critical to their organizations' digital strategy and hybrid work environment.

The findings from this global survey provide three important takeaways for all organizations to consider as they strive to create a sustainable hybrid workplace:

1. **Employees need a consistent, reliable and secure digital experience, no matter where they work.** IT teams will be challenged to meet this requirement, especially in distributed environments where the quality of network connections and cloud-based services are outside their control. As noted by BDMs in this report, investing in network and application acceleration technologies will help organizations overcome performance killers such as latency, bandwidth contention and network congestion to boost remote workforce productivity and IT efficiency.
2. **End-to-end visibility is critical to proactively managing the digital experience and mitigating security risks.** However, the ability to see problems must be coupled with the ability to understand and resolve them. Organizations need to break down monitoring silos to encourage cross-domain collaboration and find ways to transform data into actionable insights for more effective decision-making, troubleshooting, and threat hunting across diverse teams.
3. **Now is the time.** With the ongoing threat of COVID-19 and its variants, the sooner an organization can successfully enable long-term hybrid work, the sooner it can capitalize on benefits such as attracting and retaining talent, saving money, and increasing employee happiness and productivity. Business and IT leaders who invest now in the areas described in this report will be better positioned to distinguish their organizations and gain an advantage over those that don't.

Riverbed | Aternity enables organizations to maximize visibility and performance across networks, applications and end-user devices, so they can fully capitalize on their digital and hybrid workplace investments.

The Company offers two best-in-class product lines:

- » **End-to-End Visibility Solutions**, which combines Network Performance Management and Digital Experience Management (including APM and EUEM) to deliver actionable insights.
- » **Performance Solutions** for SaaS, cloud, and client acceleration, and network optimization.

Only Riverbed | Aternity offers a work-from-anywhere solution that enables hybrid organizations to:

- » **Achieve 100% visibility** into the end-user experience across every device; every app, including Microsoft 365, Salesforce, ServiceNow and Zoom; and over any network, including VPN and Wi-Fi connections.
- » **Reduce bandwidth utilization** by 99% and increase network efficiency by 100x to enable fast, reliable remote connectivity at scale.
- » **Extend optimization to laptops** for 33x faster app performance and accelerate enterprise SaaS apps, including Microsoft 365 by 8x.

A vibrant blue background featuring a central world map with a red dashed line tracing a path across continents, marked with red 'X's. A hand in a light green sleeve uses a red marker to draw the line. Surrounding the map are various travel-related items: a brown passport with a globe icon, a blue credit card, a smartphone with a location pin, a compass, a pair of sunglasses, a vintage camera, a notebook, and a cup of coffee.

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