Flexibility, Engagement, and Tech: The Perfect Combination for Modern Work

Why having the right tool for the right job is critical.

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Introduction

This report highlights research findings into flexible work practices, its benefits and related technology imperatives for companies in Asia Pacific. Specifically, it provides insights into:

- The adoption of flexible work practices

- The benefits of following a flexible work practice strategy

- The technology environment and its influence on business performance and a successful flexible work environment.

The data cited in this report comes from 1,440 companies in Asia Pacific in Australia, Indonesia, Malaysia, New Zealand, the Philippines, Singapore, Thailand and Vietnam. For more information, please refer to the 'About' section.

Flexible work practices are not new and have been in place across Asia Pacific (and elsewhere) for many years.

What has been different is the volume of employees that were required to work in this manner during the COVID-19 pandemic. Systems and technologies which typically supported a relatively small proportion of an organisation's total workforce prior to COVID-19 were required to rapidly scale to support between 90-100% as the pandemic changed how businesses and employees operated.

Flexible work practices have brought a number of benefits as well as considerations for employee work-life balance, job satisfaction and customer engagement.

Let's start by considering just how many businesses now have flexible work strategies in place.

COVID-19 made having a flexible workplace the default for Asia Pacific businesses

Our research shows that **82%** of surveyed companies in 2022 have a flexible work strategy in place and another **13%** intend to initiate one in the coming 12 months.

At the start of 2020, the percentage of companies with a flexible workplace was **50%**, indicating a **32%**.
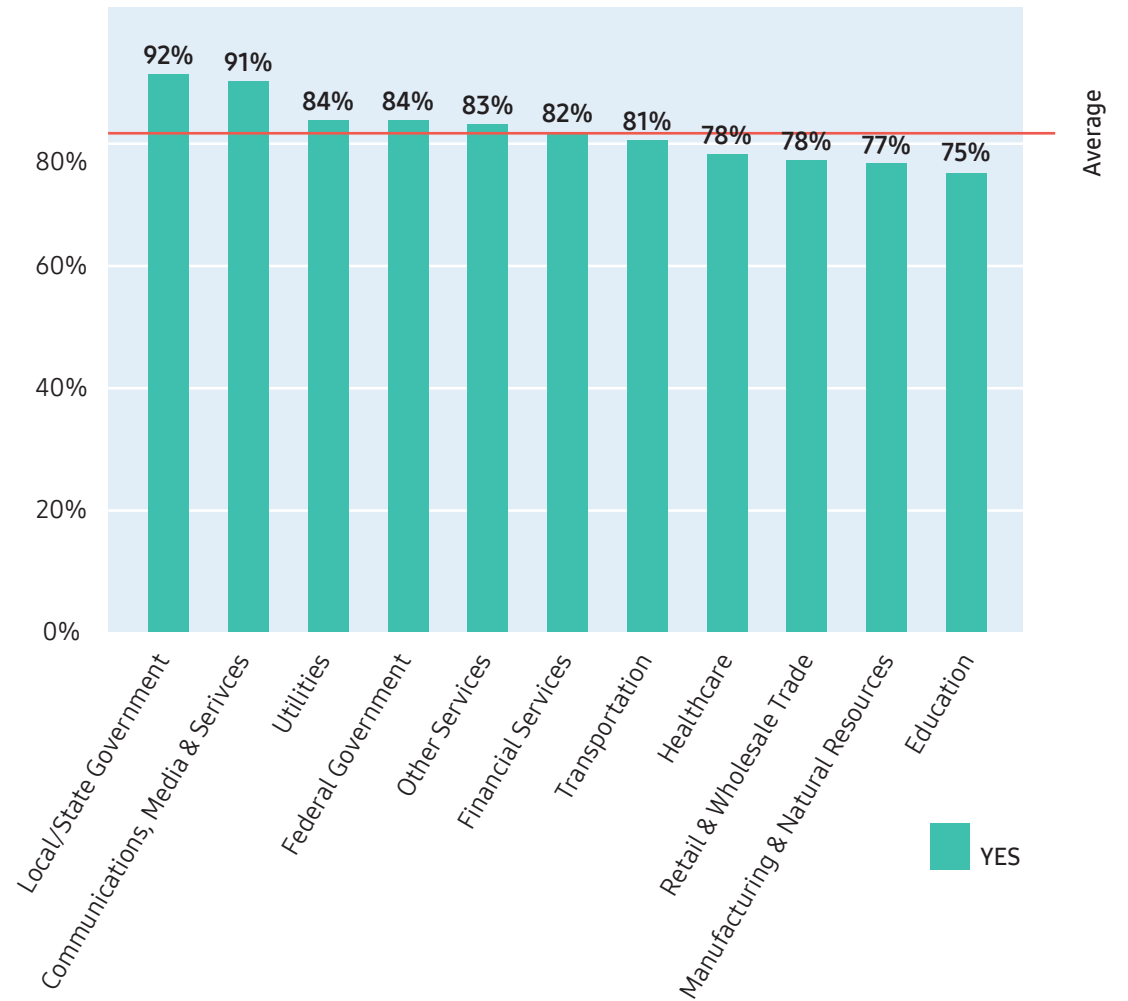
Critically the data also indicates that organisations are satisfied with the benefits and performance of their strategy with **91%** intending to keep it for the foreseeable future.

It is interesting to note that even in industries such as manufacturing, healthcare and education that are below the **82%** average for flexible workplaces, adoption rates are still relatively high at over **70%** of businesses.

Why? Well, looking beyond the acceleration from COVID-19, the benefits are very clear for both employers and employees.

Does your company have a flexible work practices strategy in place?

Bar chart showing "YES" responses by industry:
- Local/State Government: 92%
- Communications, Media & Serivces: 91%
- Utilities: 84%
- Federal Government: 84%
- Other Services: 83%
- Financial Services: 82%
- Transportation: 81%
- Healthcare: 78%
- Retail & Wholesale Trade: 78%
- Manufacturing & Natural Resources: 77%
- Education: 75%

(red line indicates Average)

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Flexible work practices bring clear business and employee benefits

It is undeniable that the COVID-19 pandemic has caused a shift in the workforce, but it could be argued that this has ultimately had a positive impact on businesses.

Many organizations have experienced improved customer service, increased employee productivity, and a shift towards an "outcomes-based" work focus that is more closely aligned with their business goals and strategies.

As flexible work practices have become more established, benefits have also been found in areas such as improved employee satisfaction and reduced levels of conflict and tension amongst colleagues.
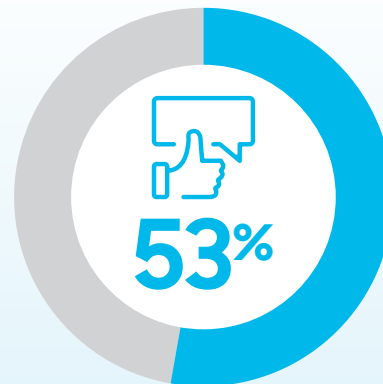
What business benefits have you gained from a flexible workplace strategy?
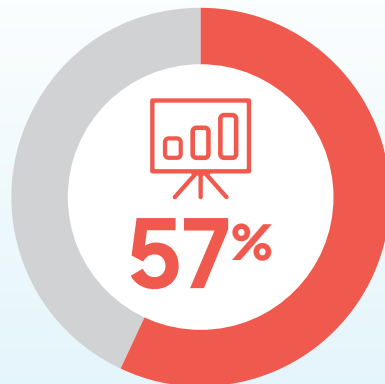
71%	57%	53%	52%	20%
Improved customer service	Increased productivity	Improved employee satisfaction	Greater focus in outcomes, not hours worked	Less conflict amoungst employees

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Employee benefits of flexible working include improved job satisfaction and productivity

Echoing the sentiments of employers, employees also experienced the same benefits from working flexibly, namely:

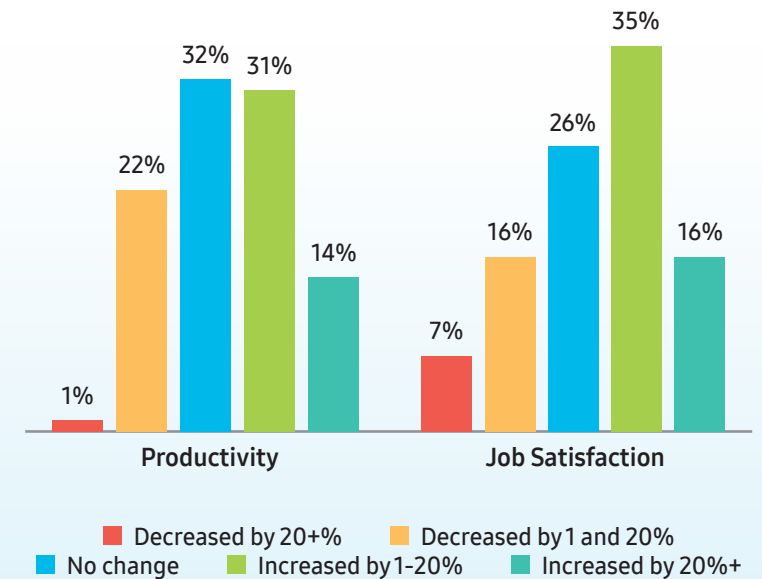**51%** felt their job satisfaction had increased, and

45% stated they were more productive in their role.

Interestingly, when asked what aspect of their job had the biggest impact on satisfaction and productivity, the top 5 factors nominated were:

1. Having the right technology to do the job
2. Being able to easily support customers or users
3. Access to the right information to do the job
4. Having the ability to communicate and collaborate with other work colleagues
5. Having a work contract and key performance indicators (KPIs) that incorporates flexible working

How has your productivity and job satisfaction changed now that you're working flexibly?

Productivity: 1%, 22%, 32%, 31%, 14%
Job Satisfaction: 7%, 16%, 26%, 35%, 16%

- Decreased by 20+%
- Decreased by 1 and 20%
- No change
- Increased by 1-20%
- Increased by 20%+

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What aspects of your work have a big impact on your performance and productivity?*

55%
Approppriate technology

50%
Being able to support customers or users

50%
Access to information to do my job

48%
Ways to collaborate with my peers

47%
My contract and KPIs reflect flexible work conditions

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Technology choices have a significant impact on flexible workplace success

In order to ensure that their technology was able to support flexible working, many companies had to "right-size" their technology capabilities to effectively meet the needs of their workforce.

As we previously highlighted, having the right technology was the most important consideration for employees as they reoriented to this new way of working.

As organizations gained more experience with flexible work practices, they realized technology issues were causing problems for employees trying to work efficiently and securely from different locations using multiple devices and applications. These cultural and technical challenges presented a significant barrier to the successful implementation of flexible working.

- Our data revealed on any given day employees typically use 2+ devices, (a mixture of laptop PC/desktop PC, mobile devices and tablet).
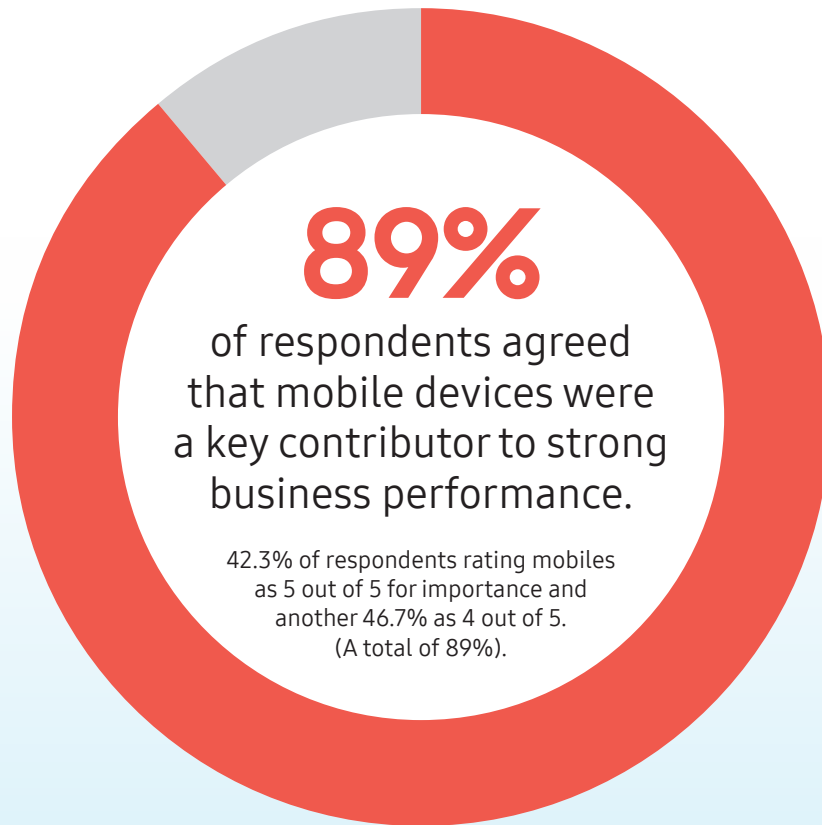
55% of employees use these devices in locations outside of the formal company office and employees typically access an average of 13 applications per day and use an average of 4 different collaboration tools (such as Microsoft Teams, Slack, Zoom, Google Meet, etc).

Consequently, in this complex environment, businesses have told us the top 3 most desired outcomes in their future flexible workplace are:

- Having secure, compliant access to accurate data regardless of work location,
- Simple integration into related data sources and workflows, and
- Timely access to customer and supplier information to support strong customer engagement (especially as face-to-face meetings are now preferred to virtual engagement).

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When deploying mobile devices, having the right device in the right place is critical ...

89%

of respondents agreed that mobile devices were a key contributor to strong business performance.

42.3% of respondents rating mobiles as 5 out of 5 for importance and another 46.7% as 4 out of 5. (A total of 89%).
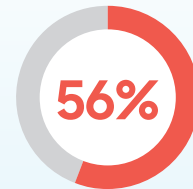
Clearly, mobile devices are a key consideration for how companies do business and using the wrong device at the wrong time can be problematic.

The survey revealed that:
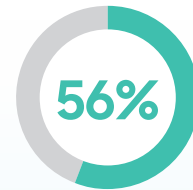
56% of companies need to routinely repair consumer mobile devices and **47%** experience device failures that necessitate replacement.

56% of companies damage consumer mobile devices at least **30% more** than **ruggedized** mobile devices, and

1 in 8 companies say damage rates for consumer grade mobile devices are **50% higher** than **ruggedized** devices

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Source: TRA "Ruggedized Smartphones & Tablets in Asia Pacific – Enterprise Adoption, Use Cases and Benefits 2023"

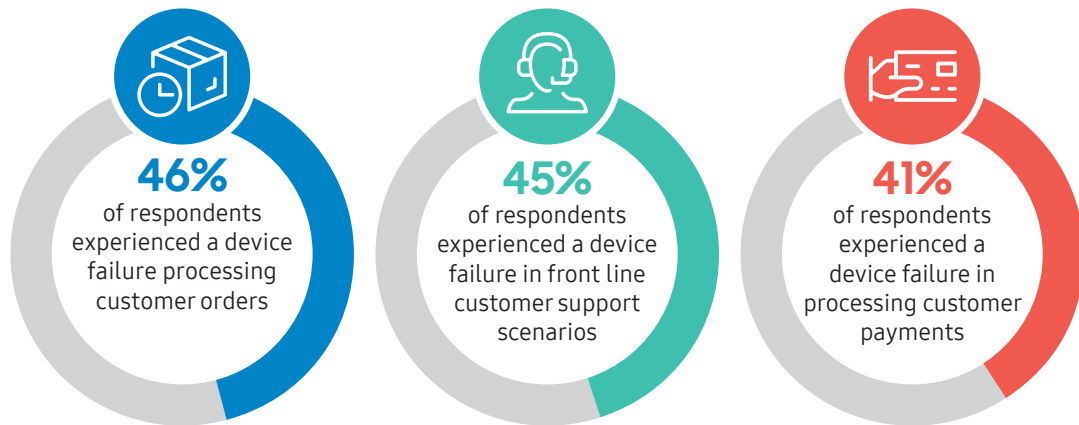SAMSUNG

... because if you don't, the opportunity costs are high

Much of these issues are attributed to damage caused by the environment in which the device is used. Employees now work in more locations, with more applications, more data, delivering higher levels of service to customers, users and partners.

Device damage, repair or replacement can have a high opportunity cost, for example, the data showed that:

46% of respondents experienced a device failure processing customer orders

45% of respondents experienced a device failure in front line customer support scenarios

41% of respondents experienced a device failure in processing customer payments

Lost revenue and customers orders are cost, employee downtime another.

Examining the survey data reveals businesses lose an average of **4.4 days of employee productivity when a mobile device requires repairs or replacement.**

Based on average salaries and a 5-day working week, that translates to a cost to the business per employee of between USD122-1,079 depending on the country:

Thailand $122 USD

Vietnam $60 USD

Malaysia $184 USD

Philippines $61 USD

Singapore $1,079 USD

Indonesia $70 USD

Australia $957 USD

New Zealand $764 USD

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Use of ruggedized mobile devices has surged between 2020 and 2022

As remote and flexible work becomes increasingly common, consumer-grade mobile devices are exposed to a variety of usage scenarios that may lead to damage. Therefore, organizations are searching for devices that offer a combination of robustness, performance, aesthetics, and user familiarity.

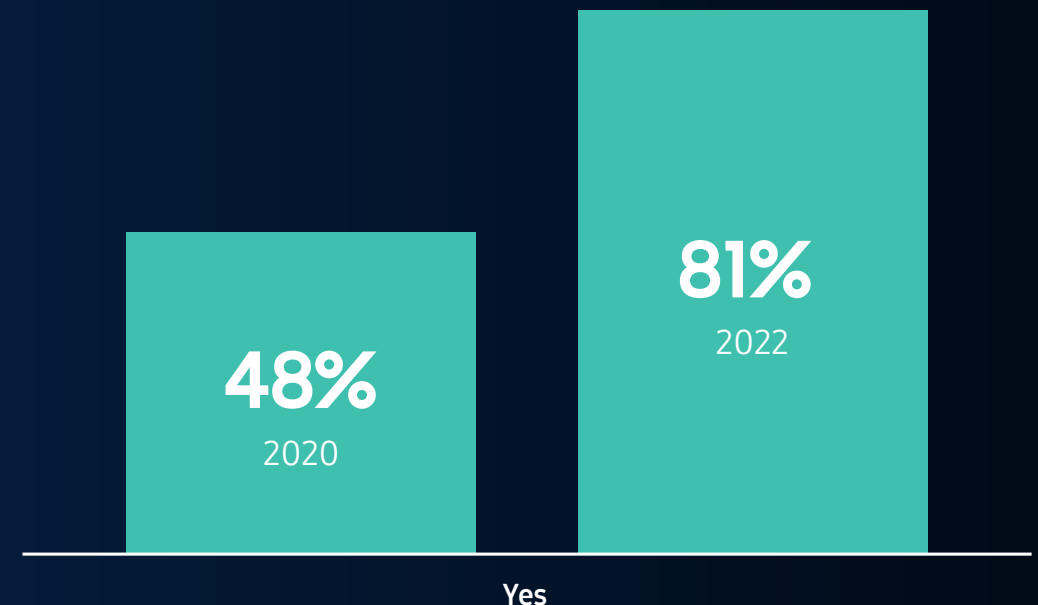Because of this, ruggedized mobile device adoption has shown strong growth between 2020 and 2022:

In 2020, adoption was at **48%**

At the end of 2022, it stood at **81%*** an increase of **33%**.

From 2020 to 2022 it is noticeable to see that use case scenarios have continued expanding as device requirements and features have evolved.

Let's take a closer look at how companies are using ruggedized devices and the benefits they gain

*Whilst we're not stating that 100% of employees in the 81% of companies are using **ruggedized** devices, the data confirms significant growth in usage by employees within these organisations.

Does your company use ruggedized mobile devices for some part of it's work operations?

81%
2022

48%
2020

Yes

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No longer for harsh environments, ruggedized mobile devices are used across all parts of business operations

TRA research suggests organisations are increasingly realising business benefits from deploying ruggedized mobile devices outside of their 'traditional roles'.

Our data indicates that an increasing number of businesses are tracking the business benefits and outcomes of using ruggedized devices.
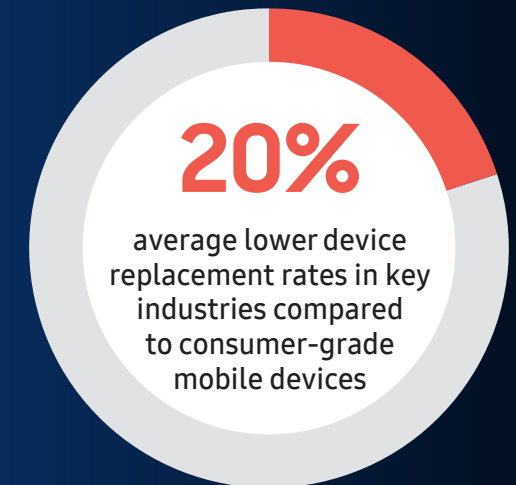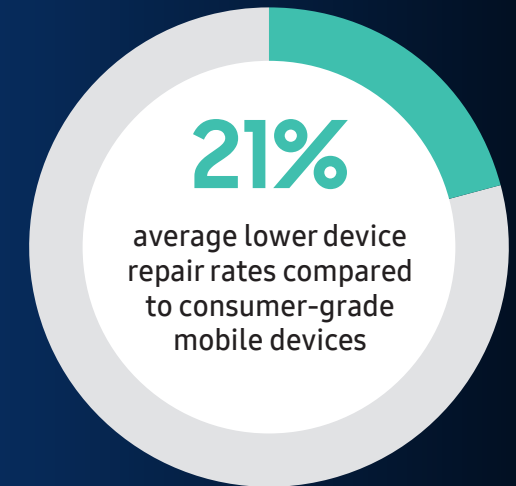
In 2020, only 36% of respondents reported capturing performance and productivity metrics from the usage of such devices. However, by 2022, this figure had risen significantly by 16% to reach 52% of businesses.

The benefits of using ruggedized devices can be broadly categorized into two types: (1) Operational benefits and (2) Line-of-business benefits.

Operational benefits centred on the following:

- Easier integration into business workflows and application environments through open platforms.

- A positive contribution to employees' work / life balance where semi-ruggedized mobile devices were provided to users.

- Lower training costs with semi-ruggedized mobile devices attributed to user familiarity with similar consumer-grade mobile device form factors.

- Lower employee usage resistance to semi-ruggedized devices that are more aesthetically pleasing and 'consumer-like'.

21%
average lower device repair rates compared to consumer-grade mobile devices

20%
average lower device replacement rates in key industries compared to consumer-grade mobile devices

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The benefits of ruggedized devices are clear

Line of business benefits centre on three key areas – workforce productivity, sales & customer service improvements and field/remote work improvements. On average businesses told us they saw the following outcomes:

Workforce Productivity

29%
increase in overall workforce productivity

23%
reduction in employee downtime

Sales and Customer Service

56%
decrease in customer service costs

50%
increase in order processing efficiency

25%
reduction in customer wait times

Field/Remote Work Operations

35%
increase in productivity

30%
reduction in data entry errors

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From Retail to Healthcare: ruggedized devices making waves in various industries

Retail

National retail food chain using semi-**ruggedized** mobile phones for in-store staff to process 'click and collect' store shopping orders with integrated order tracking and CRM software incorporated into the solution.

Healthcare

Hospital providing acute care and services for patients using semi-**ruggedized** devices with mobile scanning solutions to capture, share and store patient data for consultant, hand-over and patient care services.

Transportation

Pan-Asian logistics company using semi-**ruggedized** tablets equipped with mobile scanning and MPOS software solutions for drivers and other logistics staff to improve warehousing, shipping, vehicle safety and maintenance operations solution.

Public Sector

First responder services equipped with semi-**ruggedized** tablets with integrated office productivity, database and other cloud-based applications to provide improved care, response and information processing.

Natural Resources

An international mining company deploying semi-**ruggedized** tablets and mobiles with single button push to talk (PTT) functionality and integration with 5G private network location-based awareness applications and augmented reality overlays to enhance site and workplace safety.

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Thinking about ruggedized devices? Read this first.

There's much to consider if you're looking to use ruggedized devices to boost your business operations. While the following is not an exhaustive list, we hope it helps you with your strategy:

The device management, integration, ease of use, customisation, etc, is heavily dependent on the operating system of your chosen device. How good is your organisation with managing multiple operating platforms? What is the developer ecosystem like for each of the OS options. Are business applications well supported?with gloves on? Or with wet screens?

Connectivity options

What is your current network and broader connectivity need? How will this change in future? What allowance or consideration has been given to incorporating other connectivity services such as beacons, sensors, NFC, 5G and fixed wireless access?

What degree of customisation is needed?

What about integration and proprietary platforms? These three issues commonly impact ruggedized device deployments. Make sure you assess vendors' stance on open platforms, availability of SDKs and partner ecosystems/experience with off the shelf solutions.

What is your approach to device management and ownership?

Is it 'corporate liable' (CL – where the company issues devices for employees), 'bring your own device (BYOD – where employees use their own personal devices) or 'choose your own device' (CYOD – where employees have a range of corporate approved devices to choose from). If oversight, management control and less complexity are critical considerations, give consideration to a CL approach.

What about Security capabilities?

What level of security is available to users? Hardware? Software? How important is biometric security capability for your workforce? Does the security capability extend across all aspects of device, application and data management?
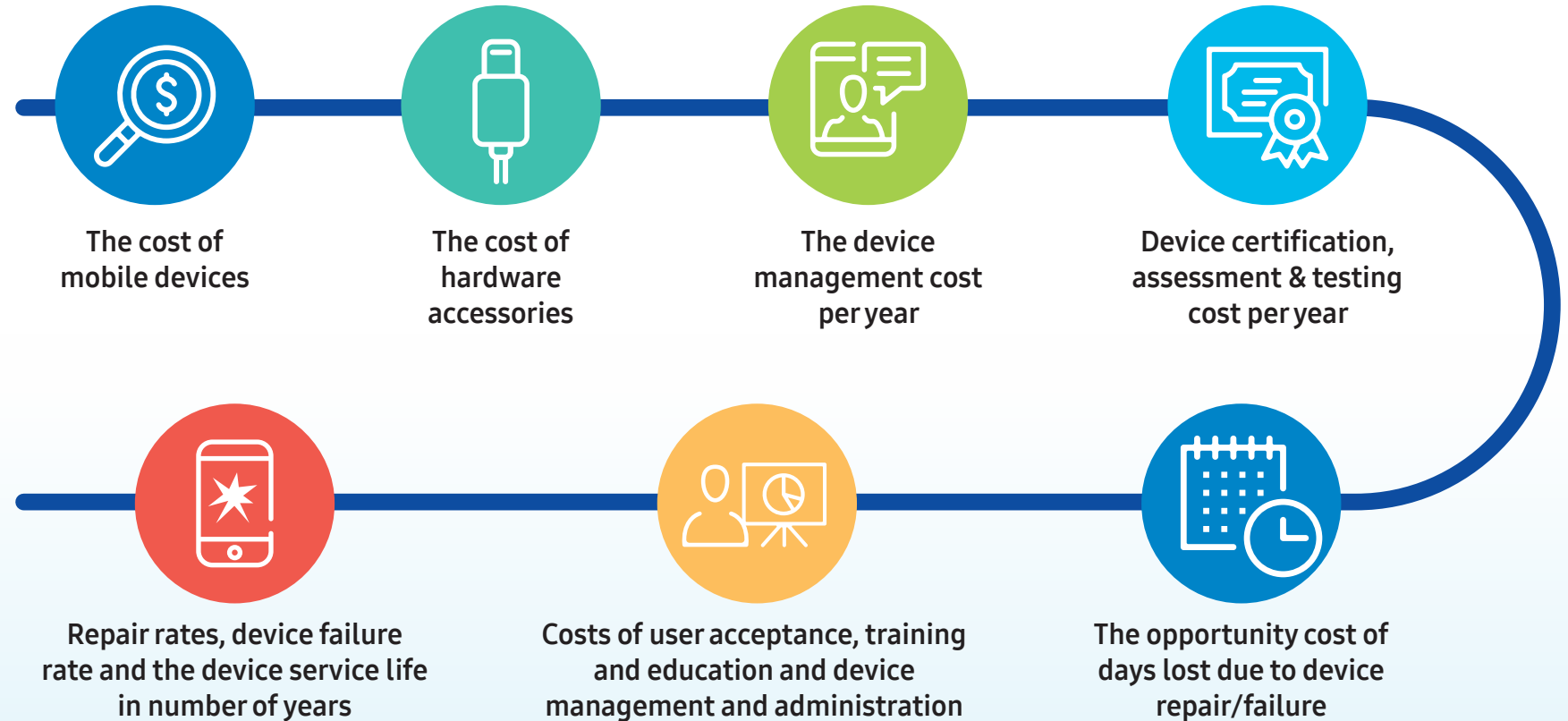
Employee profiling

Do your considerations incorporate role-base profiling for employees and how will employee roles change in the future? Ensure that you have clearly identified the key functional requirements for the role and matched this to the environment. E.g. do employees need to be able to operate devices with gloves on? Or with wet screens?

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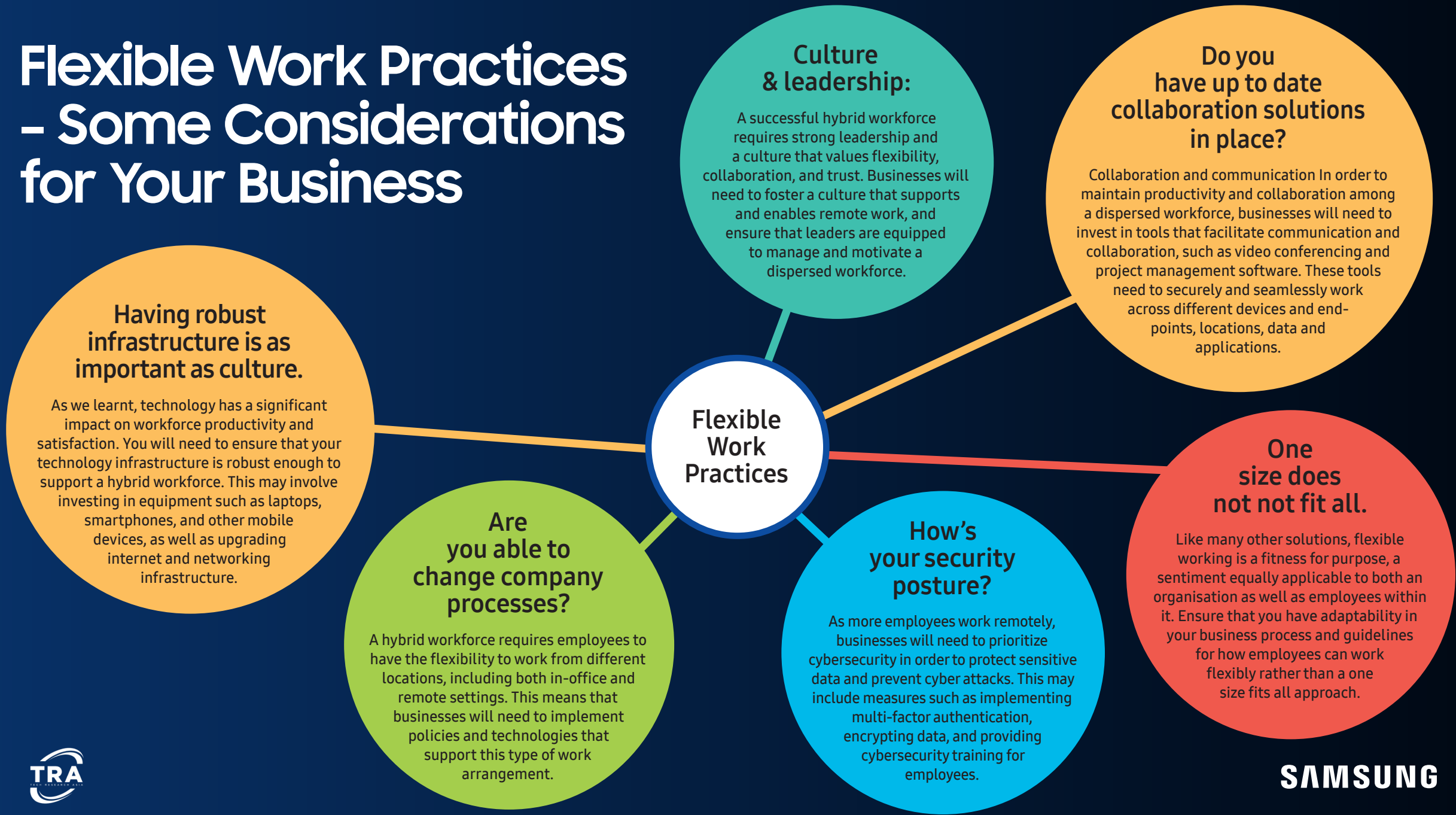# Don't forget about the total cost of ownership (TCO)

Understanding the 'total cost of ownership' (TCO) of a technology asset is a key consideration for any investment decision.

TCO can be thought of as the combined sum of the cost of buying a mobile device and the cost of maintaining and operating it over its lifetime. There are a number of direct and indirect costs associated with calculating a TCO and it's important to have a TCO model that incorporates at least the following variables:

The cost of mobile devices

The cost of hardware accessories

The device management cost per year

Device certification, assessment & testing cost per year

Repair rates, device failure rate and the device service life in number of years

Costs of user acceptance, training and education and device management and administration

The opportunity cost of days lost due to device repair/failure

Make sure that ruggedized device vendors have a clear TCO model that addresses the above factors and will help you understand the full costs of running your device for the next 3 years.

Flexible Work Practices – Some Considerations for Your Business

Flexible Work Practices

Culture & leadership:

A successful hybrid workforce requires strong leadership and a culture that values flexibility, collaboration, and trust. Businesses will need to foster a culture that supports and enables remote work, and ensure that leaders are equipped to manage and motivate a dispersed workforce.

Do you have up to date collaboration solutions in place?

Collaboration and communication In order to maintain productivity and collaboration among a dispersed workforce, businesses will need to invest in tools that facilitate communication and collaboration, such as video conferencing and project management software. These tools need to securely and seamlessly work across different devices and end-points, locations, data and applications.

Having robust infrastructure is as important as culture.

As we learnt, technology has a significant impact on workforce productivity and satisfaction. You will need to ensure that your technology infrastructure is robust enough to support a hybrid workforce. This may involve investing in equipment such as laptops, smartphones, and other mobile devices, as well as upgrading internet and networking infrastructure.

Are you able to change company processes?

A hybrid workforce requires employees to have the flexibility to work from different locations, including both in-office and remote settings. This means that businesses will need to implement policies and technologies that support this type of work arrangement.

How's your security posture?

As more employees work remotely, businesses will need to prioritize cybersecurity in order to protect sensitive data and prevent cyber attacks. This may include measures such as implementing multi-factor authentication, encrypting data, and providing cybersecurity training for employees.

One size does not not fit all.

Like many other solutions, flexible working is a fitness for purpose, a sentiment equally applicable to both an organisation as well as employees within it. Ensure that you have adaptability in your business process and guidelines for how employees can work flexibly rather than a one size fits all approach.

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In closing

The COVID-19 pandemic accelerated an already established trend for businesses in Asia-Pacific to adopt flexible work practices.

Businesses told us the benefits of flexible work practices range from increased productivity and customer service to a more beneficial work-life balance and improved job satisfaction.

As employees serve and engage with customers in more and more locations and environments, the business 'frontline' has evolved away from office-based locations.

A critical point of failure can be if the technologies underpinning the initiatives are mis-aligned with business goals and employee roles. In this context, having a robust, secure, easy to use mobile device fleet is an important contributor to success.

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Versatile
Empowering pros with versatility

Open up more choice

Open up seamless continuity

Devices in various sizes and form factors

Seamless work within the Galaxy Ecosystem

Entry to flagship
Innovative foldables
Business ruggedized
Enterprise Edition

Galaxy ecosystem
Accessory ecosystem
Galaxy connected experience

Optimized
Optimized for the way you work

Open up streamlined productivity

Open up innovative usability

Driving productivity in the workplace

Enhancing the way you work

Advanced connectivity
S Pen features
Battery and charging

Z Fold optimized apps
PC-like experience
Frontline solutions

Secure
Advanced protection and management

Open up to industry-grade security*

Open up to effortless management

Designed to give you peace of mind

Built to make IT powerful

Built-in security
Built-in protection

Knox Suite
Knox Validated Program
Knox Service Plugin

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About

RESEARCH METHODOLOGY AND DEMOGRAPHICS

To inform the report, TRA undertook a quantitative survey of 1,440 organisations in 8 countries:

- 🇦🇺 Australia: 209
- 🇮🇩 Indonesia: 187
- 🇲🇾 Malaysia: 180
- 🇳🇿 New Zealand: 125
- 🇵🇭 Philippines:189
- 🇸🇬 Singapore:183
- 🇹🇭 Thailand: 188
- 🇻🇳 Vietnam:179

The survey was conducted as an anonymous online panel in September 2022 by an independent third party specialist survey organisation based in Asia. Respondents were drawn from businesses in multiple industry sectors including Government, Financial Services, Healthcare, Education, Retail & Wholesale Trade, Transportation & Logistics, Manufacturing & Natural Resources, Utilities and Communications, Media & Professional Services. To be eligible to

participate, respondents were required to hold Executive or Director level positions with an IT decision marker responsibility or influence.

Semi-ruggedized and ruggedized

Semi-ruggedized mobile devices blends the familiarity, design and features of consumer smart mobile devices with high-end specialised ruggedized ones incorporating various features such as IP ratings, MIL-SPEC standards, etc.

This semi-ruggedized category reflects the growing deployment of ruggedized devices into new markets. Historically, ruggedized devices, MPOS, PTT and scanning solutions are typically deployed in 'heavy' industries that exhibit harsh environments and difficult conditions – mining, transport, construction, etc. In today's business environment, these ruggedized devices lack a number of features around aesthetics, design, ease of use, weight, multi-application capable, etc that limit their suitability for many businesses seeking a device that is more robust than consumer grade mobile devices.

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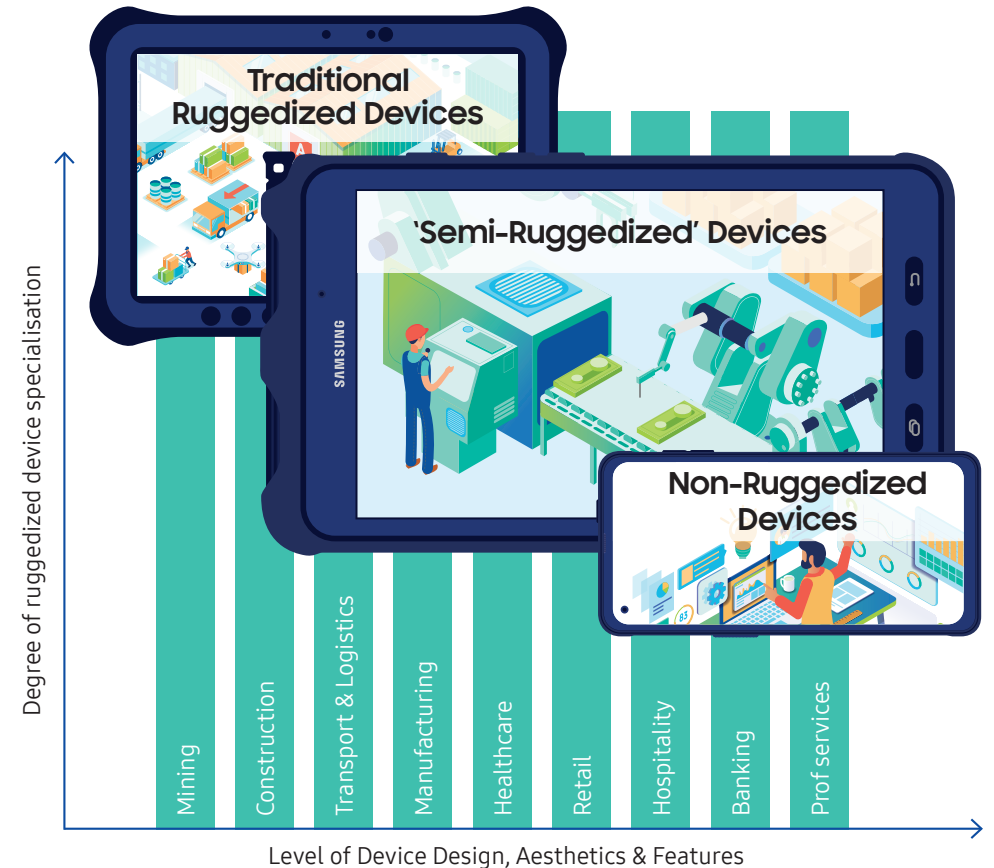
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This research paper presents research findings that have been commissioned by Samsung Electronics. However, it is important to note that the views, opinions, and conclusions expressed in this document are solely those of Tech Research Asia (TRA) and do not necessarily reflect the perspectives of Samsung Electronics.