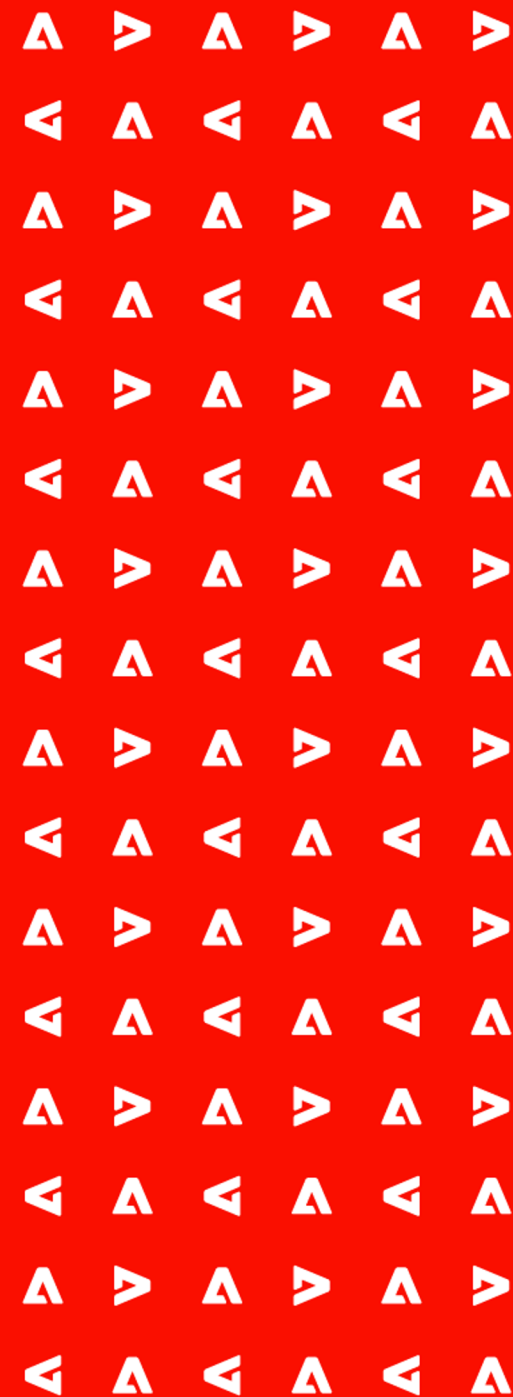




The Future of Digital Work: Australia

A study fielded by
Adobe Document Cloud



Contents.

Executive summary.

The state of digital work.

The factors enabling and constraining productivity.

The impact of poor technology on productivity and the workplace.

Maximising productivity with the right technology tools.

Respondent profile.



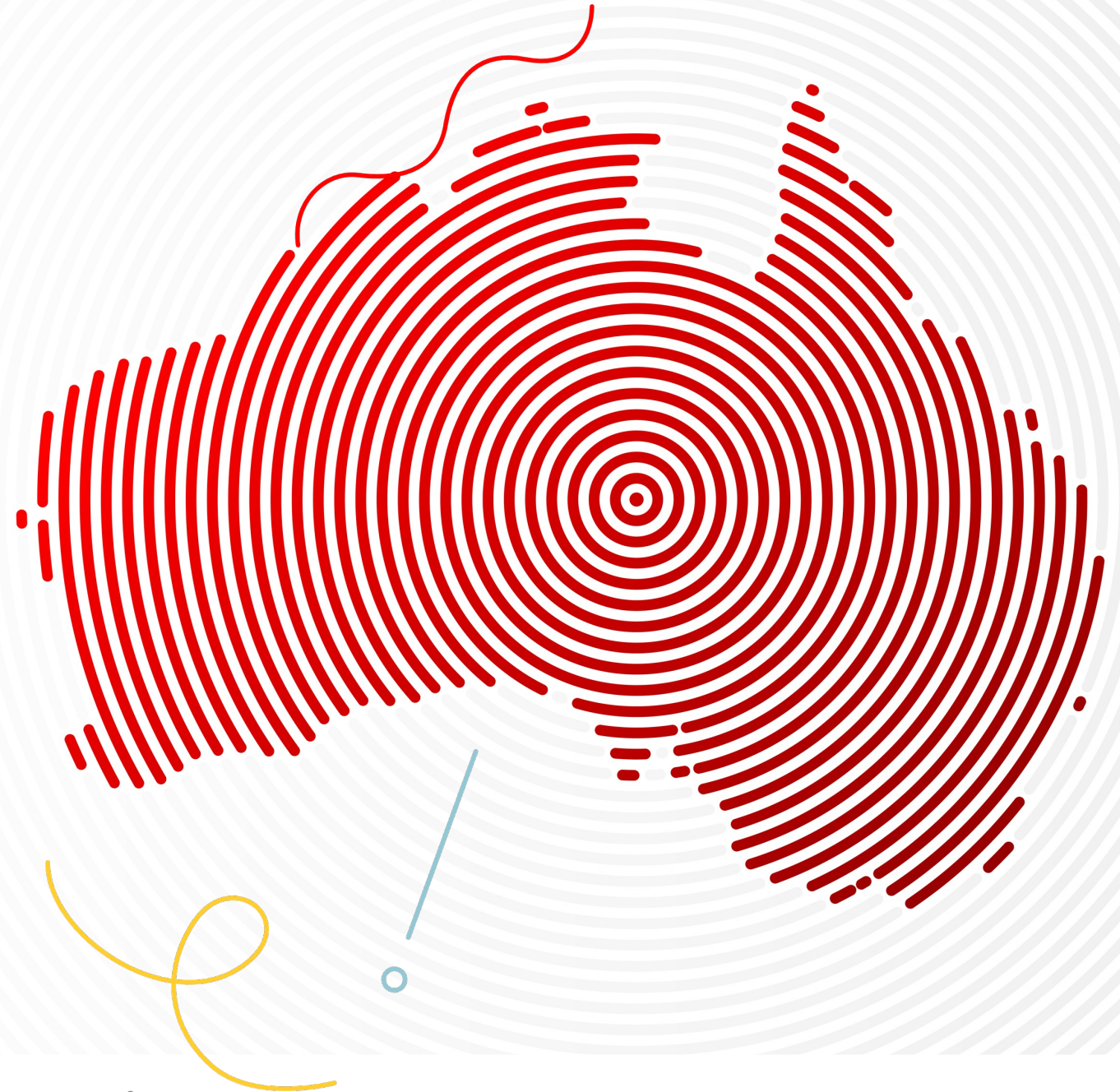
Background and objectives.

Purpose

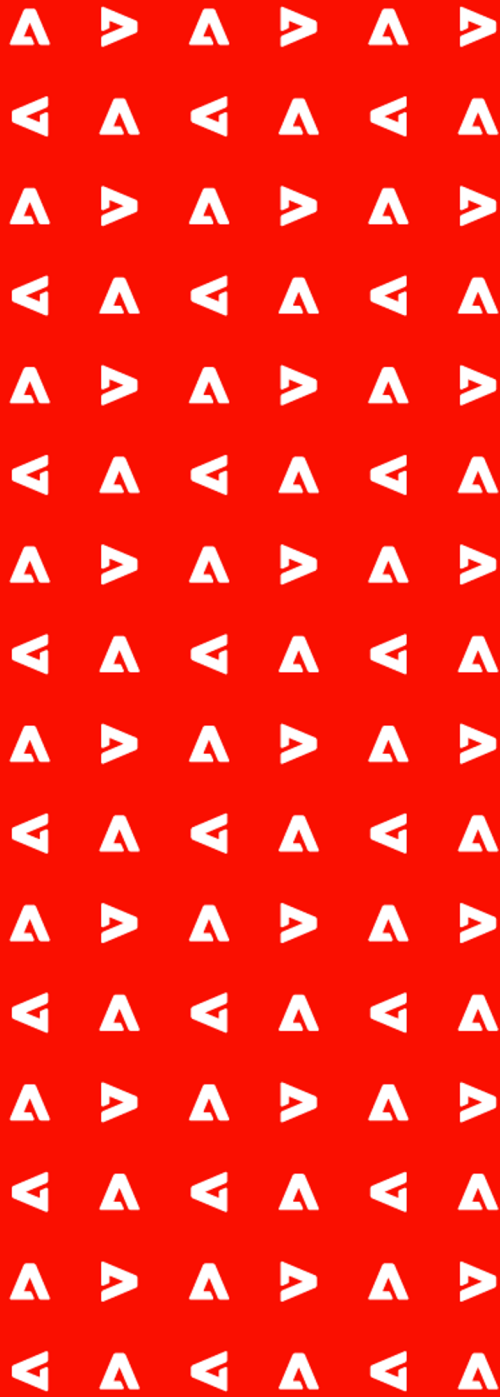
The research examines attitudes towards digital technologies and productivity among Australian knowledge workers, including the factors that enable and constrain productivity. In doing so, it identifies the digital tools and processes that are most important to a productive and satisfied future workforce.

Approach and audience

The Future of Digital Work Australia report is based on an April 2023 survey of 506 knowledge workers within Australia. This includes 76 leaders in the positions of Director or more senior and 430 employees. All respondents regularly use digital documents and say digital technologies are important to their daily work activities.



Executive summary.



Key highlights.



Modern workplaces need technology, but not everyone is an expert

More than **8 in 10** workers say technology is essential to their daily work, but fewer are digitally literate, and a fraction are experts. Many workplaces also still conduct paper-based work.



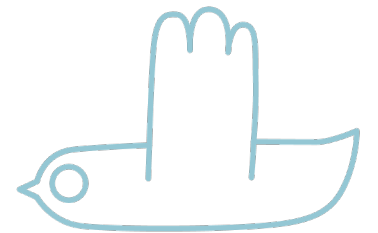
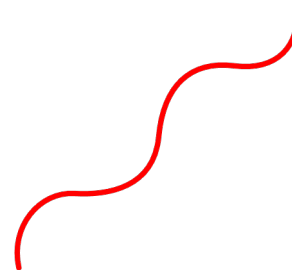
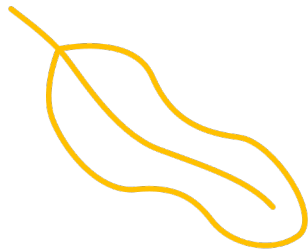
Leaders aren't always in the office, even if employees are

Hybrid is the workspace of choice for **51%** of knowledge workers, and more among leaders. Meanwhile, employees are **2.5x+** more likely to be in the office full-time than their superiors.



Work with impact is the key to productivity.

51% of knowledge workers equate productivity with impactful work, while only **28%** say it's about doing more work, faster.



Key highlights.



 **Multiple factors hurt productivity, but poor tech tops the list**

Workers are distracted by economic uncertainty, with **84%** saying rising living costs hold back productivity. Even more (**87%**) say poor technology impacts productivity, with a lack of automation and managing approvals across systems noted as the biggest barriers.



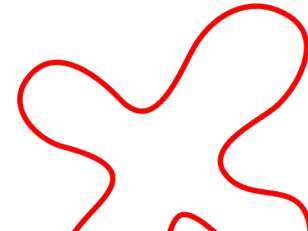
The productivity fallout from poor tech has hard consequences

Almost **2 in 3** leaders say 2-4 hours are lost daily due to substandard technology. **31%** say it's taking at least **20%** off the bottom line. Efforts to attract and retain people are at risk, with most saying the right technology influences whether they take a job, and **13%** are set to quit due to poor technology.



Employees are self-starters when it comes to digitally-driven productivity

More than **2 in 3** knowledge workers say they're responsible for their own productivity, more than double those who defer to leaders. More than **4 in 10** will seek and recommend tech-based productivity solutions or rally the organisation to upgrade.



Key highlights.



Automation and AI are top productivity enablers but remain untapped

Among knowledge workers, **85%** say automation is helpful or miraculous, and **91%** say the same about AI. However, lack of automation remains the biggest tech-based productivity barrier, and while **51%** of leaders have adopted AI, only **25%** of workers appear to have access.



Workers want generative AI, and adoption is expected to rise.

2 in 3 knowledge workers want their organisation to use generative AI, but only **22%** currently do. That's set to rise, with **58%** expecting to use it in future to capture benefits.

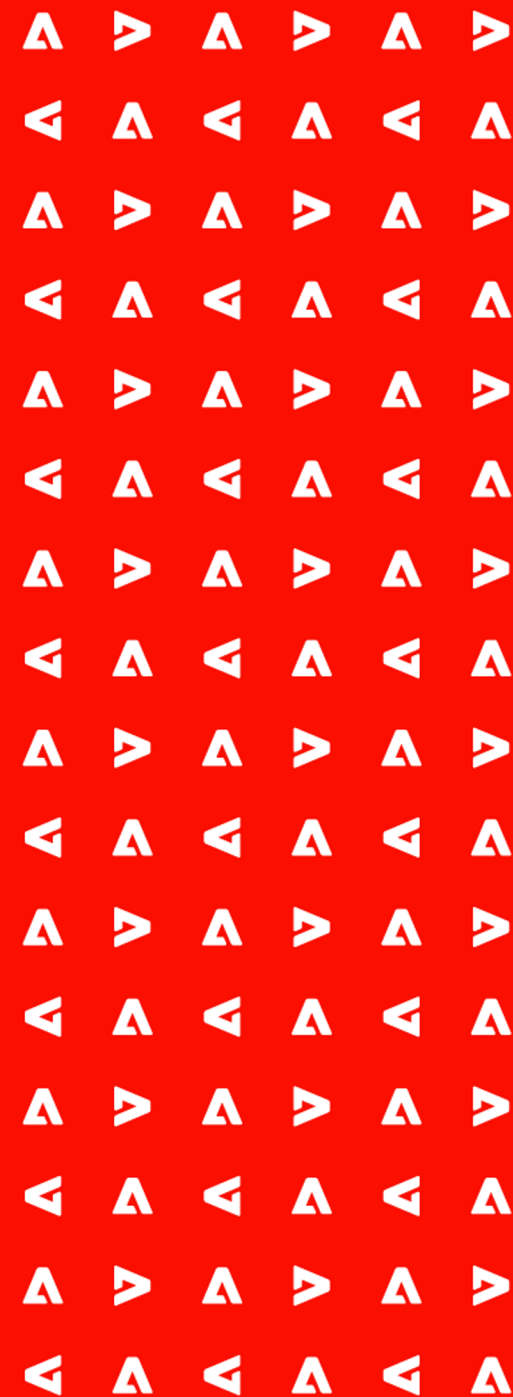


Generative AI could usher in next productivity frontier, and enable impact

The vast majority of knowledge workers agree that generative AI has the potential to help them in their roles (**68%**) or is miraculous (**23%**). Efficiency, managing routine tasks and doing better quality work are among the broadly felt benefits.



The state of digital work.



Australian knowledge workers rely on digital tools, but not all have the capabilities to use them.

Digital technologies have become an integral part of our daily work routine, with a significant majority of respondents saying they are essential to their work.

However, digital proficiency is lagging when compared to the proportion that rely on technology. While few admit to struggling, just over **1 in 3** admit they are just getting by. Only around **1 in 10** claim to be, or have access to, top experts.



82%

of knowledge workers say digital technologies play an essential role in day-to-day work.



62%

of knowledge workers rate their digital literacy as good.



13%

of knowledge workers say they are one of the top experts or that there's one in the organisation.

Hybrid emerges as workspace of choice, but far more employees than leaders are back in the office full-time.

Just over

 **1 in 3**

of knowledge workers are in the office full time, particularly employees (**41%**)

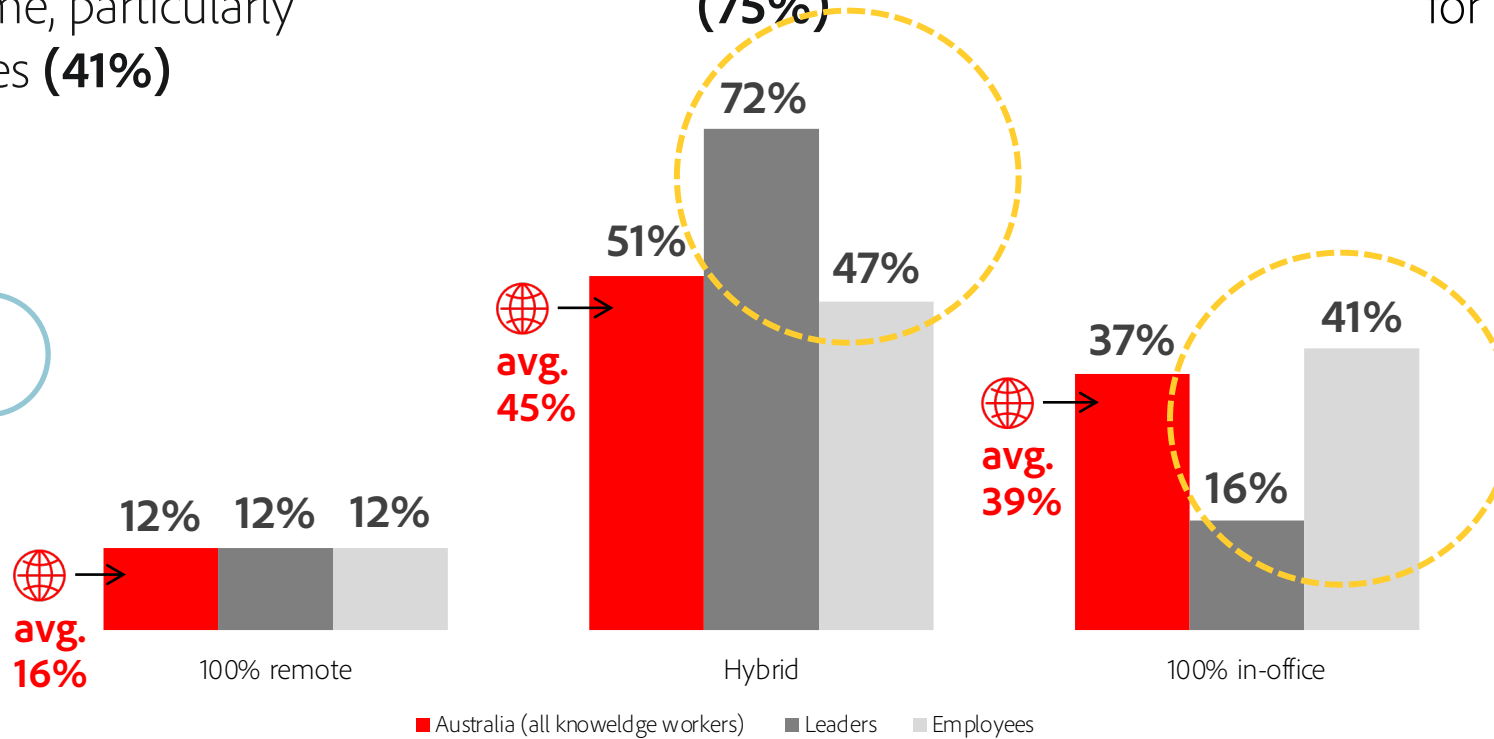
 **1 in 2**

are hybrid, particularly leaders (**75%**)

Only

 **12%**

of are fully remote, the same for all roles



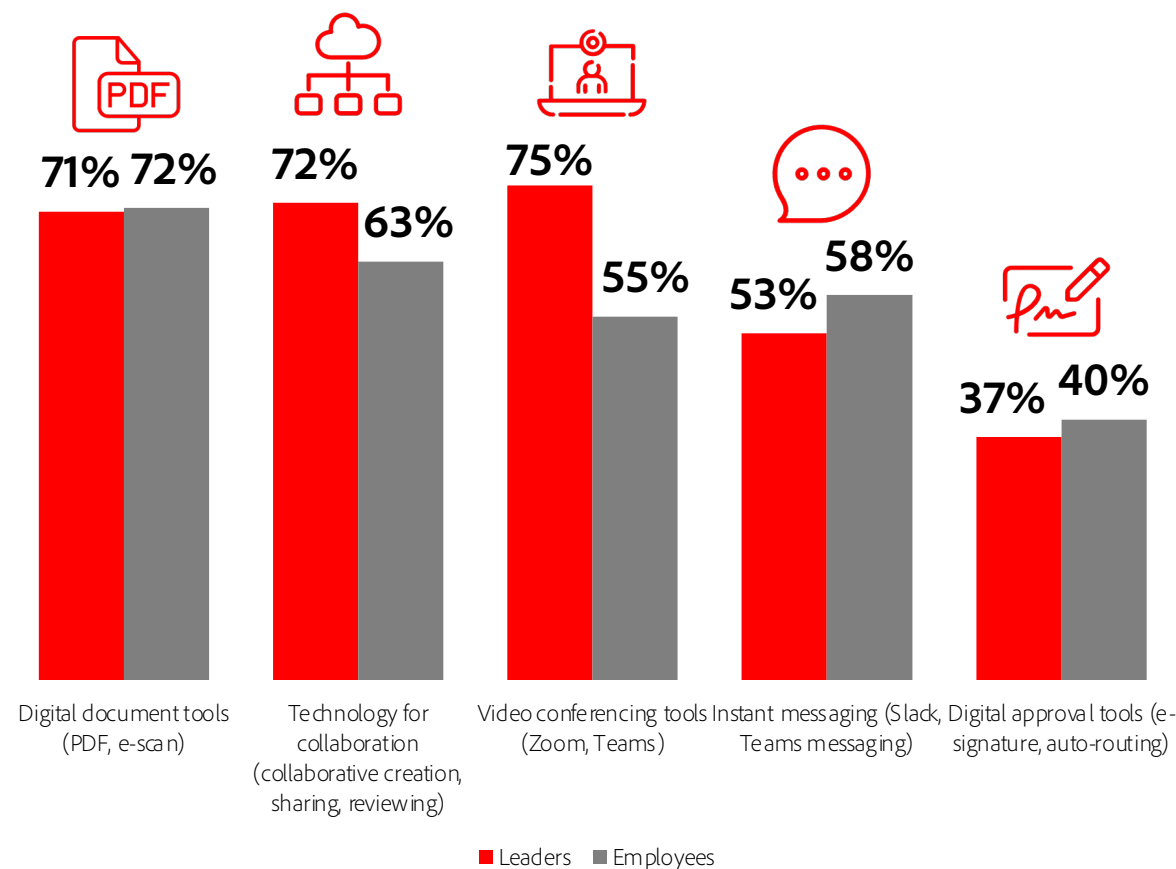
A distributed workplace and effective collaboration between leaders and employees relies on critical technologies.

Of the devices that workers feel they are most productive on, laptops are first (**54%**), then desktops (**35%**), tablets (**6%**) and mobile phones (**5%**). Senior leaders are more likely to say laptops and mobiles, whereas employees over-index on desktops.

Of all technologies, knowledge workers overall are most likely to agree they can't live without digital documents (**72%**), technology to support collaboration (**65%**) and video conferencing (**58%**) follows.

With more leaders working in a hybrid way than employees, they are more reliant on collaboration and video conferencing. Employees are more likely to be reliant on instant messaging platforms and digital approval tools.

Digital tools that people can't live without



Paper-based work remains a feature despite digital ways of working.

Despite the increasing adoption of digital technologies, paper-based work continues to be used in many workplaces. More than **1 in 3** knowledge workers say that at least half of their work is paper-based, while just **19%** say they are fully paperless.

The split between paper-based and digital ways of working



100% digital

19% of workers



25% paper

46% of workers



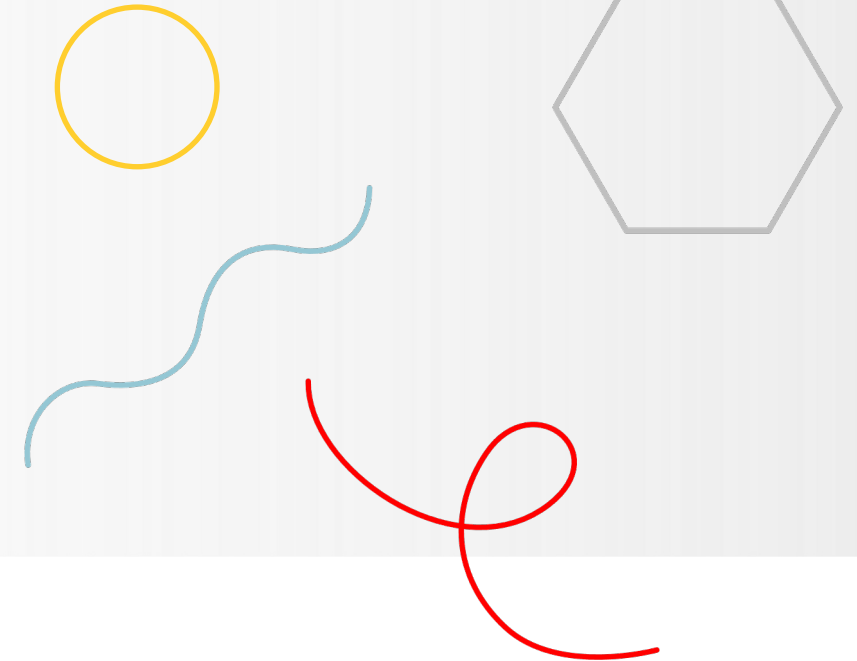
50% paper

23% of workers



75% paper

10% of workers



The factors enabling and constraining productivity.



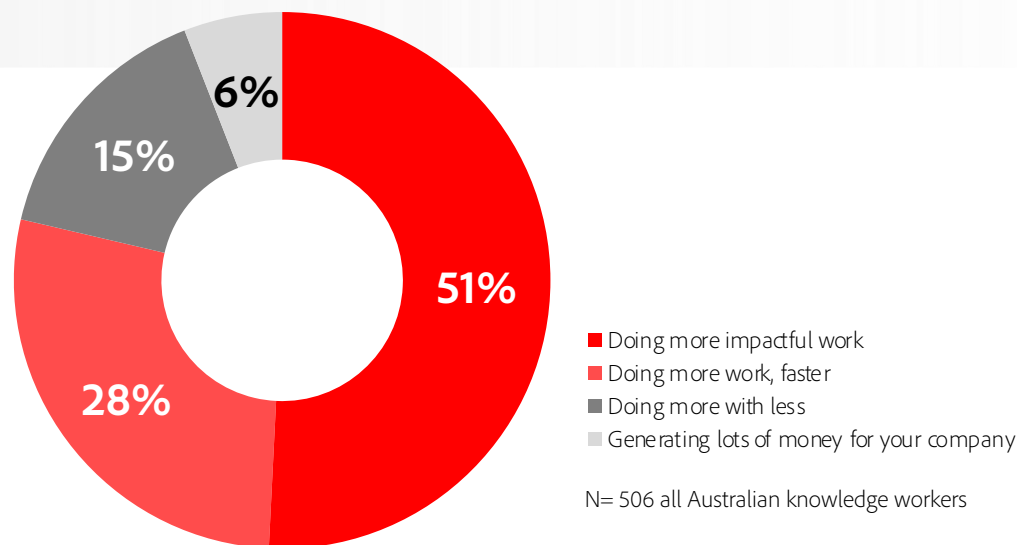
Traditional notions of productivity in the workplace are shifting as people prioritise impact alongside volume and speed.

On average, **knowledge workers** are almost **2x** more likely to equate productivity with doing more impactful work than more work, and **3x** more than efficiency.

This perception is being led by **employees (52%)**, who are more likely than **leaders (43%)** to link productivity with impactful work.

Hybrid and office workers (51%) are more likely to say the same compared to **remote workers (43%)**.

How people interpret productivity at work



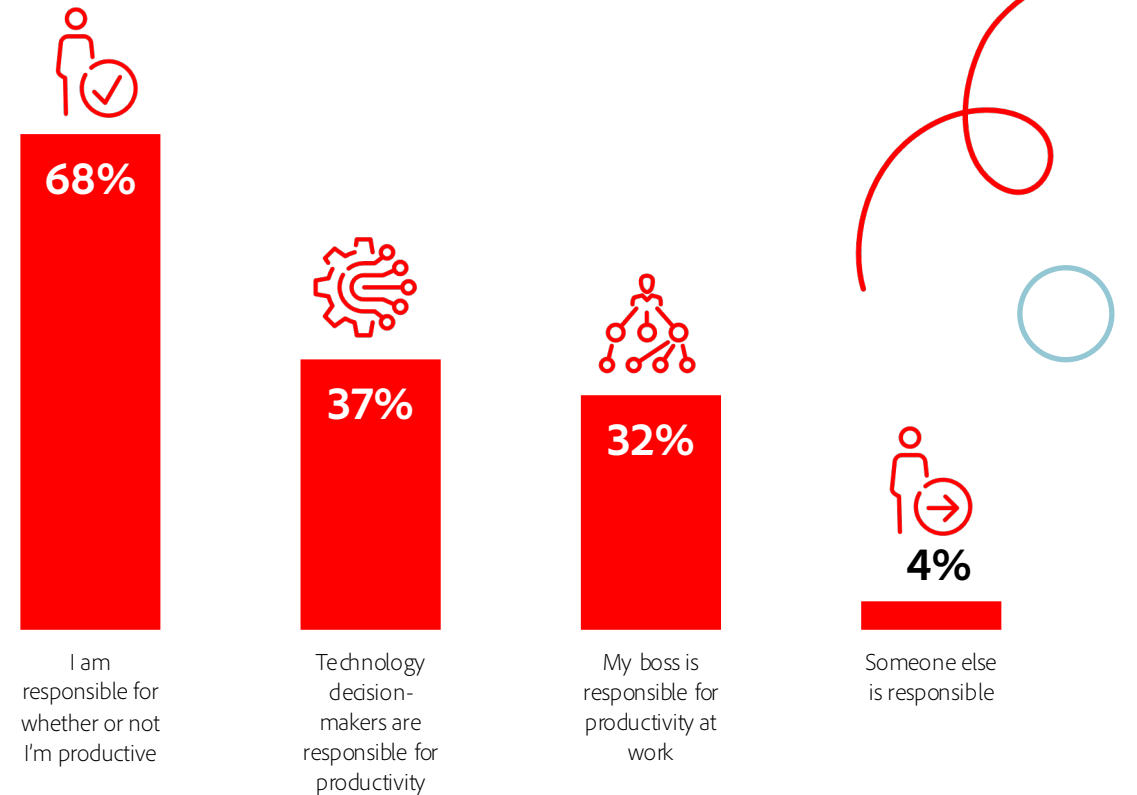
Productivity is a shared responsibility, but employees are self-motivated to make a difference.

More than **2 in 3** Australian knowledge workers feel responsible for their own productivity, more than double those who say it's up to leadership.

Yet, perceptions are divided when examining the views of leaders and employees:

- Leaders are far more likely to believe that they are responsible for their team's productivity (**66%**) compared to employees (**27%**).
- More leaders also place the onus of productivity on technology decision-makers (**58%**) compared to employees (**34%**).

Who is responsible for productivity at work



External factors and economic uncertainty are taking a toll on productivity.

The majority of Australian knowledge workers (**58%**) say that external factors like inflation, and economic and geopolitical uncertainty impacts workplace productivity. This is less than the global average (**72%**).

Leaders are more likely to believe these factors are hurting productivity (**75%**) than employees (**56%**), and almost **1 in 3** say it has a substantial impact or is killing productivity altogether.

The factors hurting productivity



84%

High cost of living



58%

Possibility of a recession



51%

Wage disparity



47%

Lack of flexibility at work



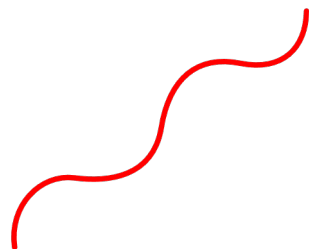
34%

Rental or housing crisis



26%

Hybrid working arrangements

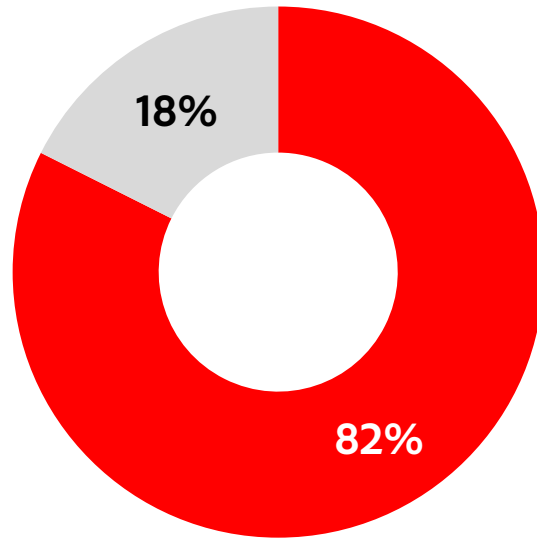


But more agree substandard workplace technology creates a drag on productivity.

The Australian workforce is more reliant on digital tools and platforms than ever, with **89%** saying technology is important to productivity. However, **87%** of knowledge workers agree poor technology tools are negatively affecting their productivity.

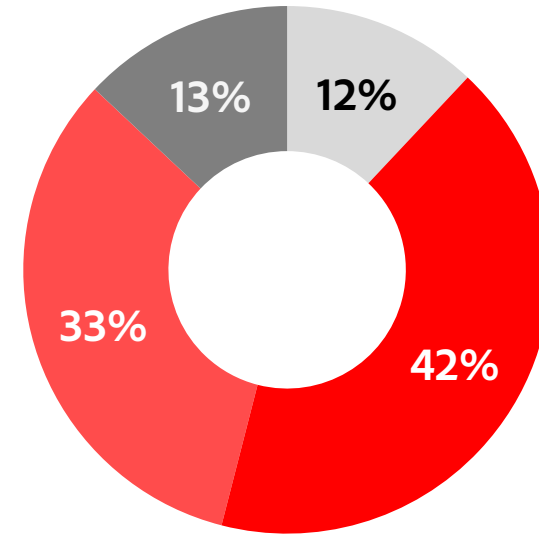
Of these, **12%** says it's killing productivity and that they can't get anything done.

Role of digital technologies to workday



■ Essential part of day to day work

Impact on productivity of poor technology



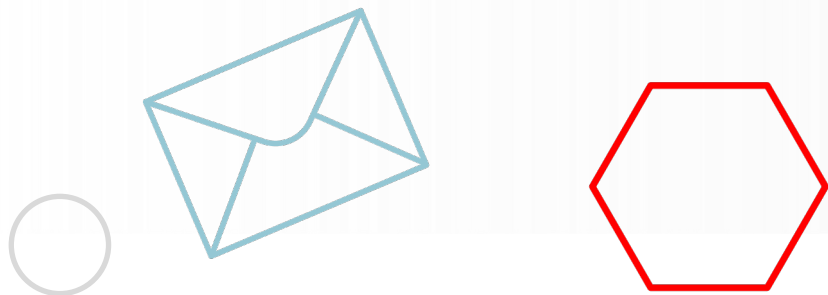
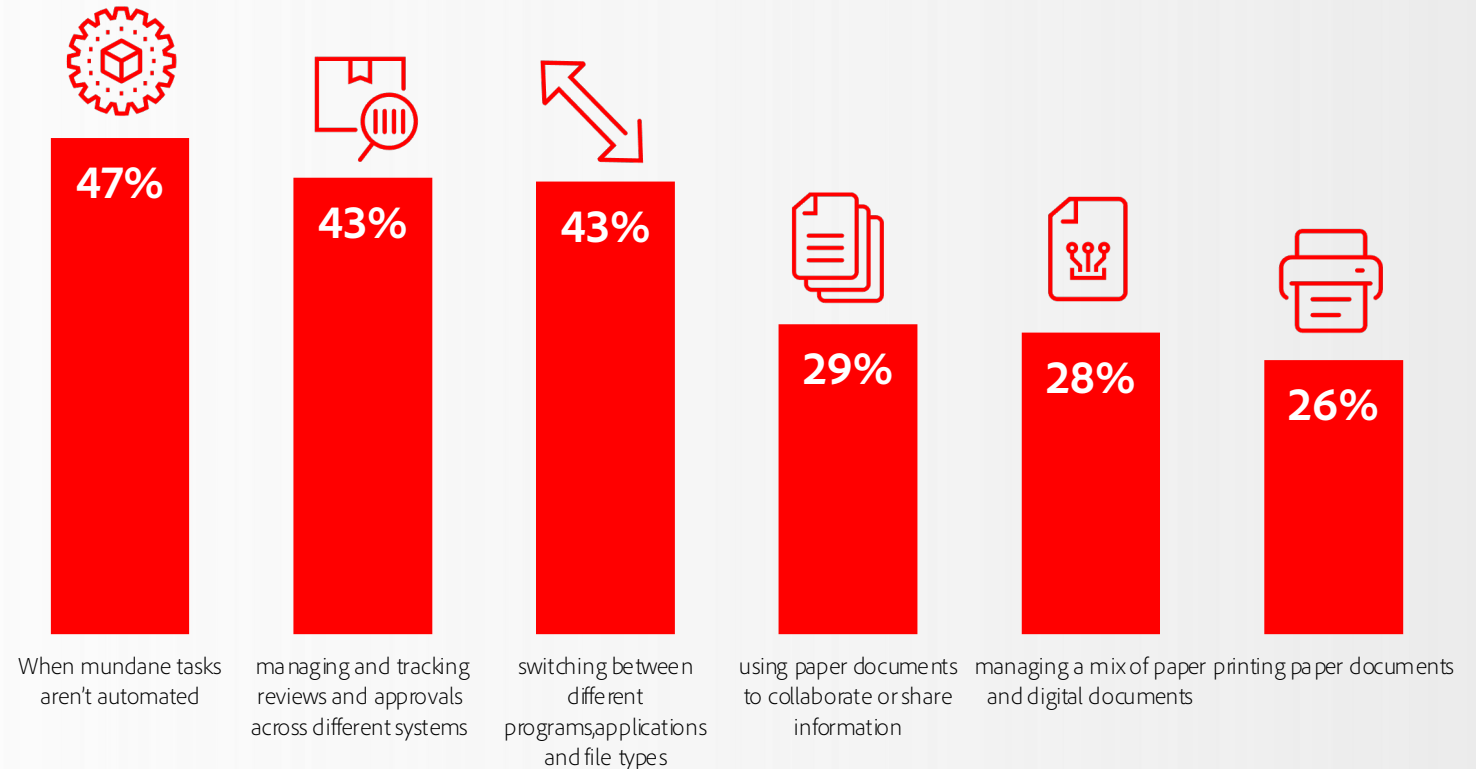
■ It's killing my productivity. I can hardly get anything done
■ It's substantially reducing my productivity
■ It's mildly reducing my productivity
■ It's not reducing my productivity

Lack of automation holding back employees from doing work that matters.

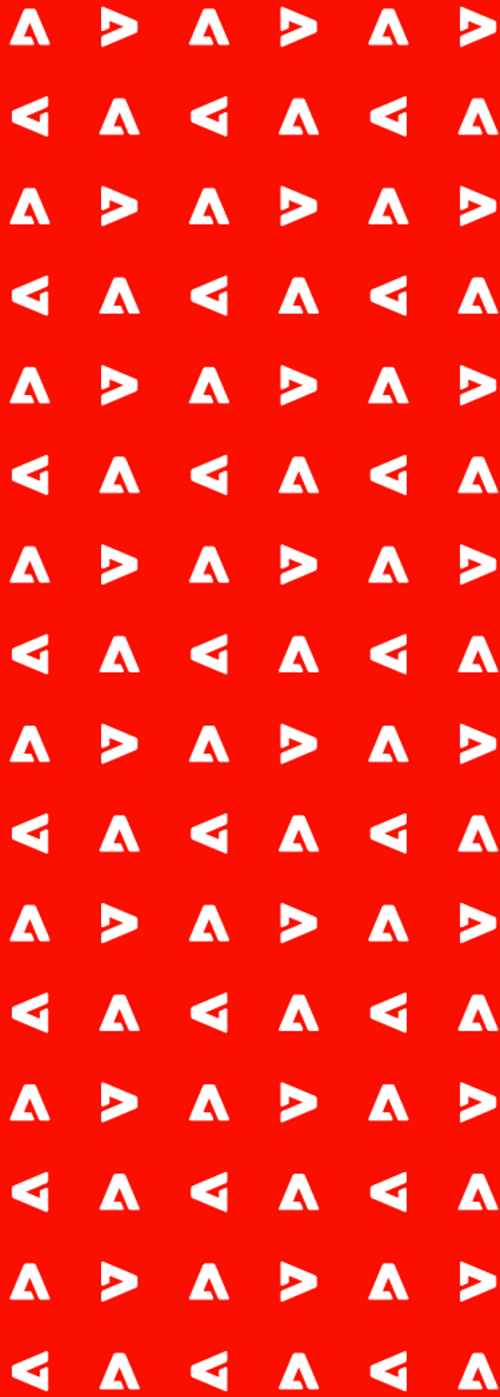
Almost **5 in 10** say that when mundane tasks aren't automated, it hinders their productivity. Likewise, globally, employees say the lack of automation is their number one productivity killer.

Managing and tracking document reviews across systems and switching between programs, applications and file types follows (both 43%).

What's responsible for decreased workplace productivity



The impact of poor technology on productivity and the workplace.



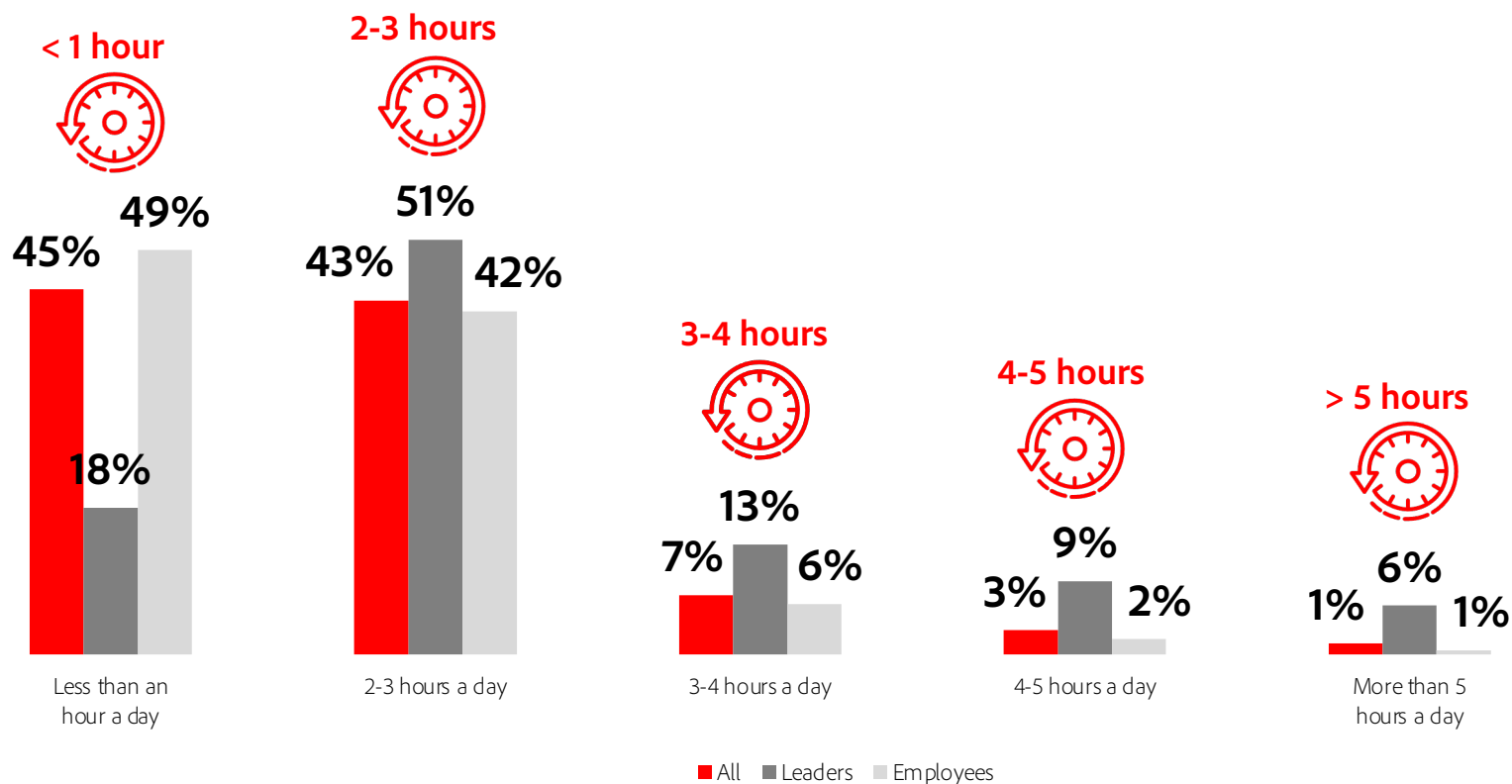
Poor technology tools are taking hours away from workers each day, which some leaders say could equate to upwards of a day each week.

Leaders (**88%**) and employees (**87%**) overwhelmingly agree that poor technology tools can hurt productivity.

But the impact is unevenly felt, with **64%** of leaders saying they are losing 2-4 hours a day due to poor technology, and **16%** saying more than 4 hours per day.

For employees, **48%** are losing 2-4 hours per day and just **3%** more than 4 hours.

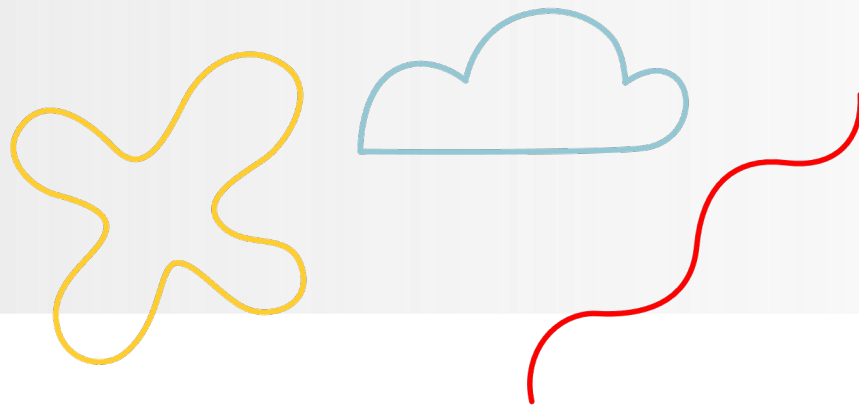
Lost productivity in time due to poor technology tools



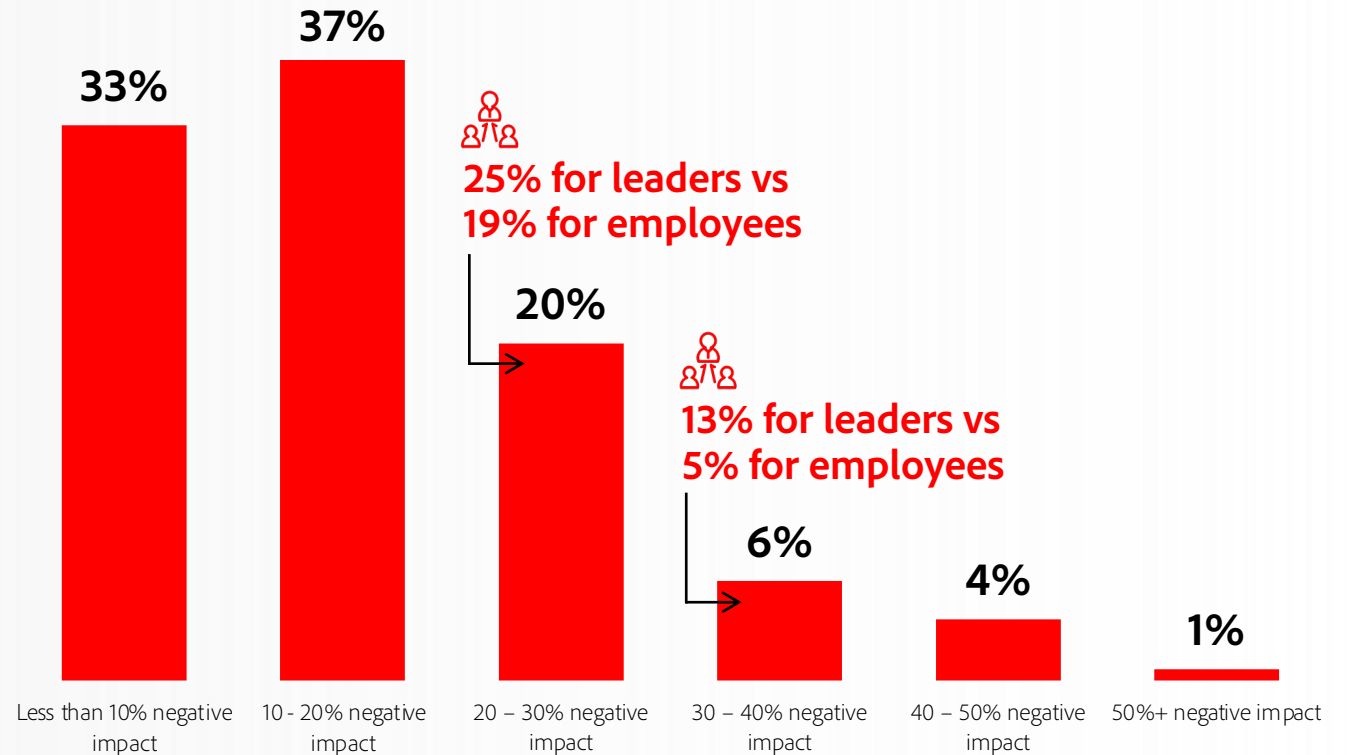
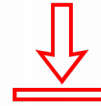
Substandard tech is also significantly eroding the bottom line.

Leaders are more likely to create a connection between poor technology, lower productivity and profitability.

Overall, **31%** of all workers believe poor technology tools negatively impact profitability by **20%** or more. That's **42%** among leaders and **29%** among employees.



Negative impact to bottom line



Poor technology also has a significant impact on talent retention.



While **91%** of leaders think their company offers the right technologies to boost productivity, **72%** of employees think the same.



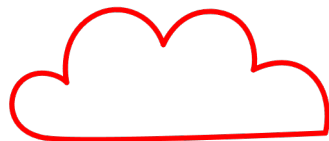
When workers encounter technology at work that constrains productivity, only **21%** said they would speak up to a superior.



Instead, **17%** would look for another job and **15%** said they would 'quiet quit' or tune out. That figure rises to **25%** for leaders compared to **13%** among employees.



13% of employees are considering quitting their job in the next 6 months because of work tech holding back productivity. This can be as high as **39%** for those that are 100% remote.



It's also one of the most important factors for workers when taking a new job.

Most knowledge workers also say that access to technology factors heavily into their decision to accept an offer, with the majority saying it's critical or a top consideration.



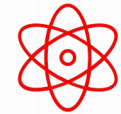
23%

Absolutely critical



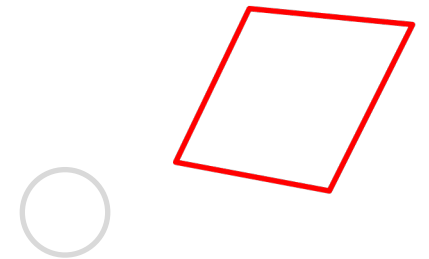
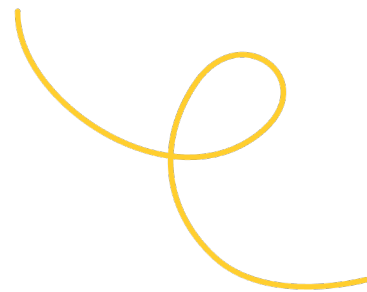
44%

It's a top consideration

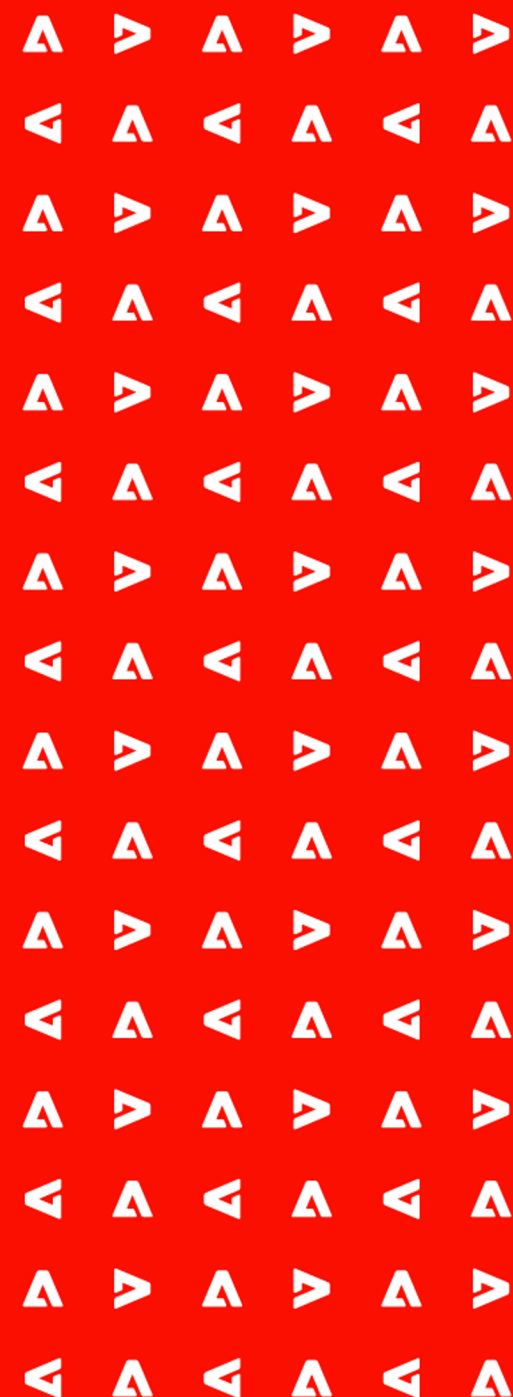


25%

It's one of the many things
I consider



Maximising productivity with the right technology tools.

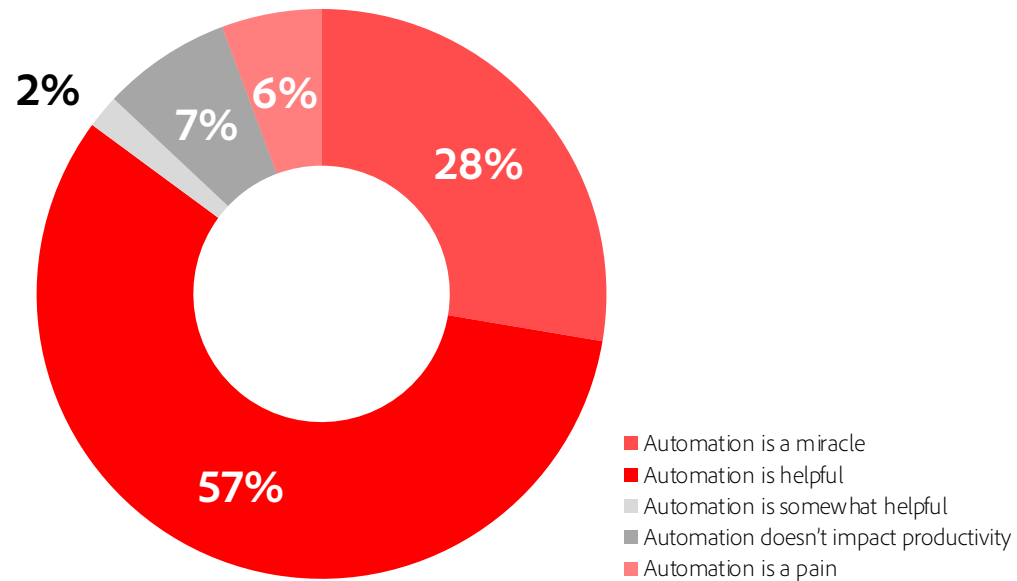


Automation becomes a key driver of productivity for knowledge workers.

Given a lack of automation is cited as the top inhibitor of productivity, it's not surprising to see that **85%** agreeing it is helpful or even miraculous. Just **13%** say it doesn't help.

That jumps to **93%** of leaders who say automation aids productivity compared to **86%** of employees.

Attitudes towards automation

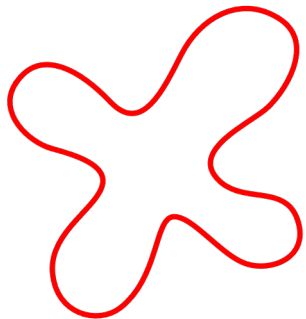


The benefits of AI are broadly felt, but it's leaders who are at the forefront.

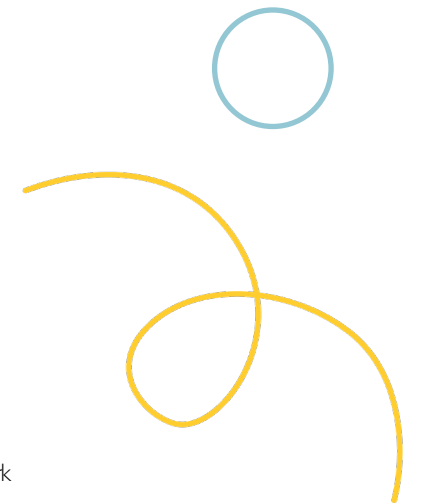
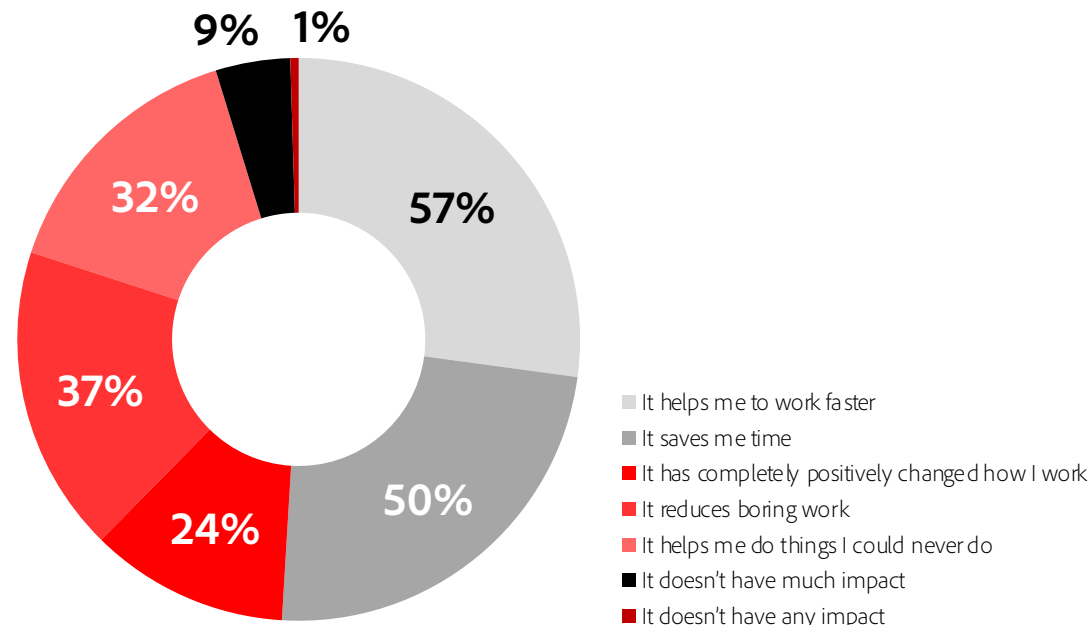
The research suggests more businesses have adopted AI solutions than the workforce is aware of, with twice the number of leaders saying their organisation uses AI (**52%**) than employees (**25%**).

That's amid a broad alignment among leaders and employees that AI has a positive impact on work (**68%**) and almost 1 in 4 saying it's miraculous (**23%**).

Leaders particularly see the benefits, including being able to work faster, save time, and eliminate boring work. One in four workers overall say it's completely changed the way they work for the better (**24%**).



Attitudes towards AI



Strong support for generative AI from across the workforce with editing and summarising in the frame.

There is a strong belief in the potential of generative AI to improve document workflows and increase productivity.

66%

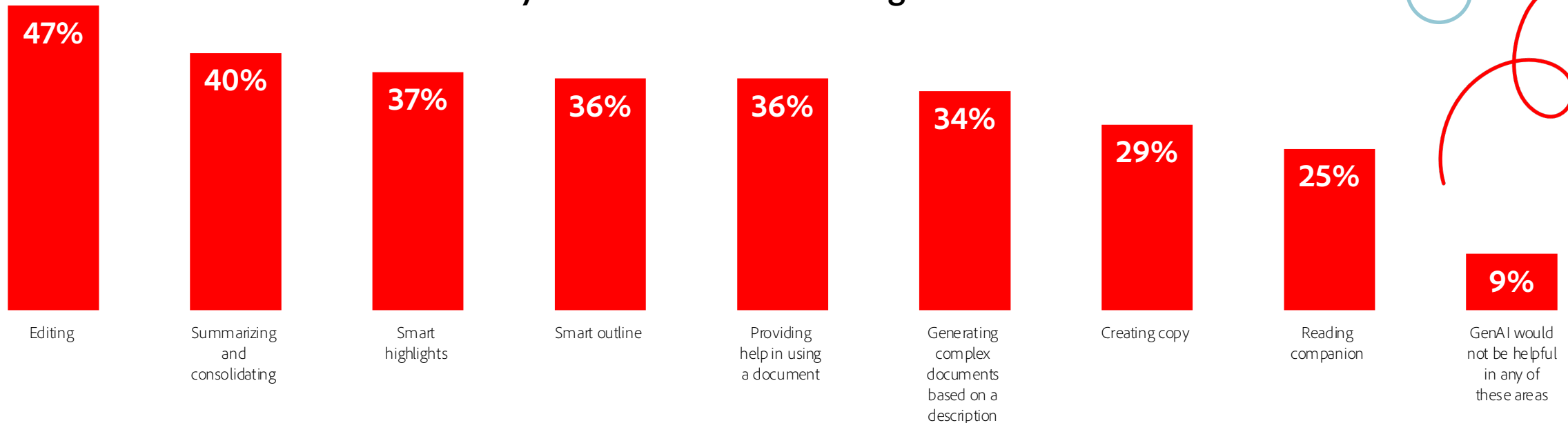
of knowledge workers believe that their companies should use generative AI. This includes 7 out of 10 of leaders.

However only

22%

of respondents says their companies currently use generative AI.

Potential ways GenAI can make working with documents easier



Efficiency and quality at the forefront of employee minds when it comes to GenAI.

How generative AI can help

86%

It would help me integrate information from different sources faster

86%

I could work faster

84%

I could reduce or eliminate hard, boring, or redundant work

83%

I could do more work

83%

I could create better quality work

83%

I could consume more information

83%

I would have more time for more interesting work

80%

It would free my brain to be more creative and strategic

77%

It would help me understand complex concepts better and faster

72%

It would make me want to stay at my job

Companies want knowledge workers to use generative AI more often in the future, and most employees expect it.

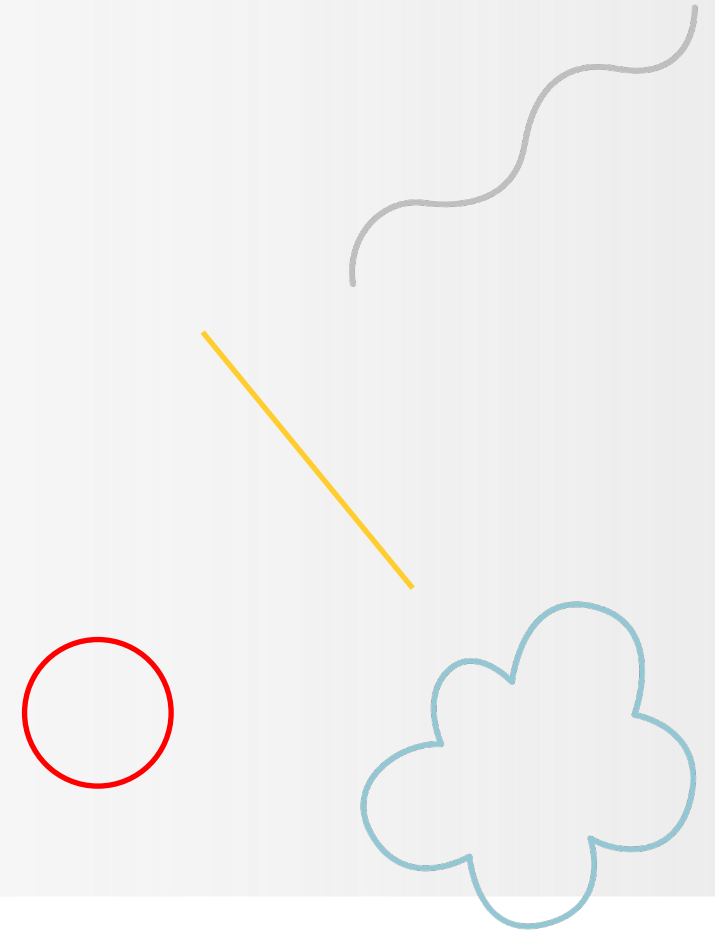
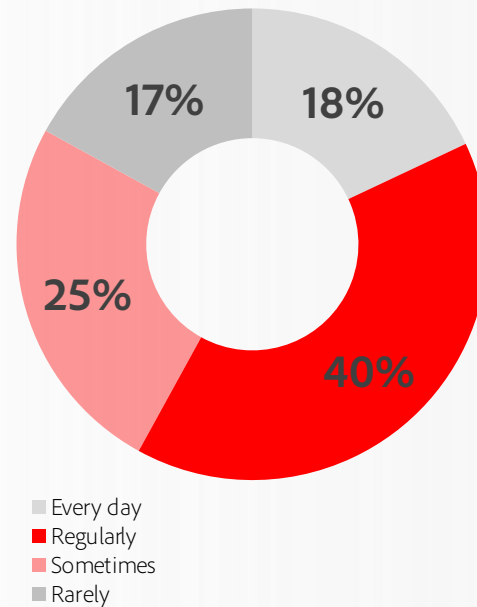
As we look at the trends relating to the future use of Gen AI,

58%

of workers expect to use generative AI at least regularly (if not every day) in future.

That jumps to **71%** of leaders compared to **56%** of employees.

Frequency prediction in use of AI



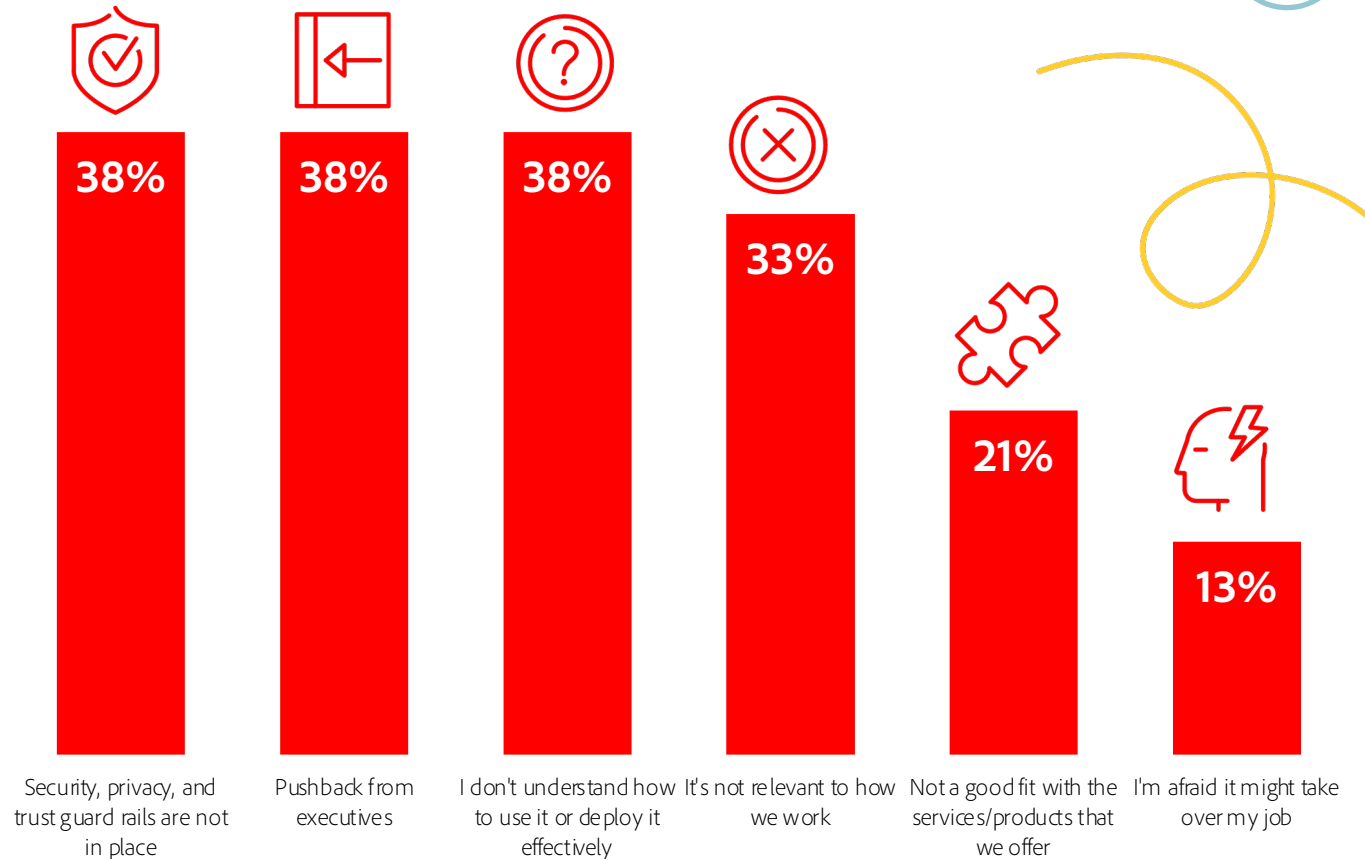
For those that aren't ready for AI, security and exec sponsorship are top barriers

While **68%** of workers are ready to adopt generative AI in document workflows today, **32%** are not.

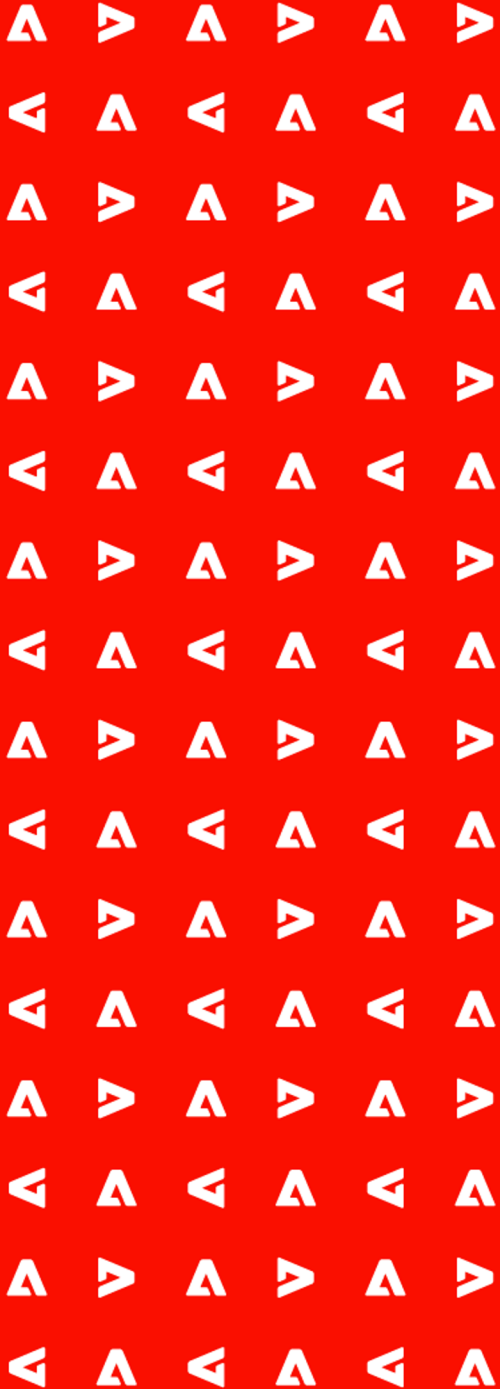
Those that are not ready cite several top barriers that prevent its adoption:

1. Security concerns
2. Pushback from executives
3. Lack of understanding

Why workers aren't ready to adopt generative AI

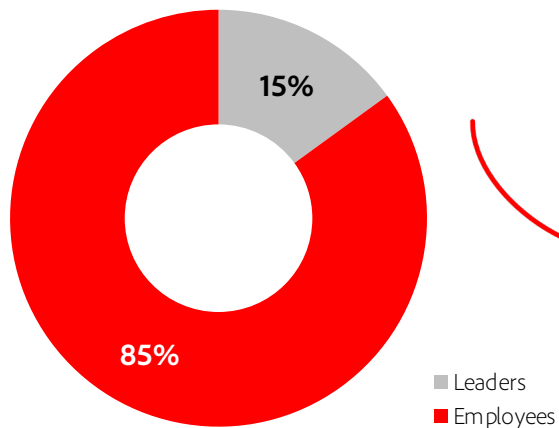


Respondent profile.

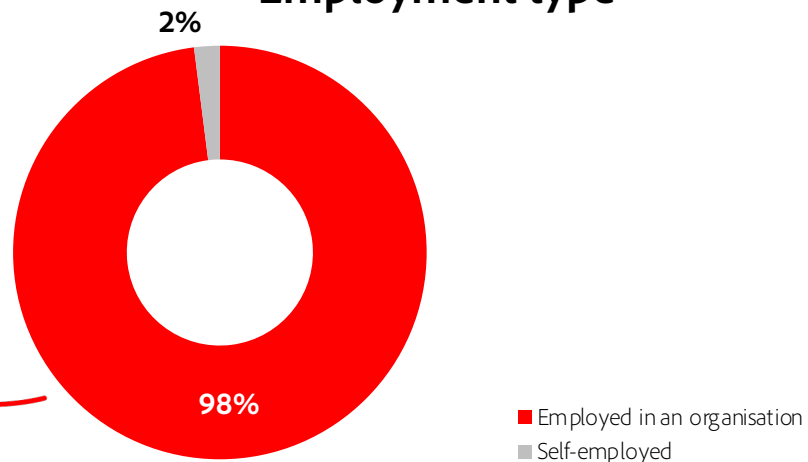


Demographics.

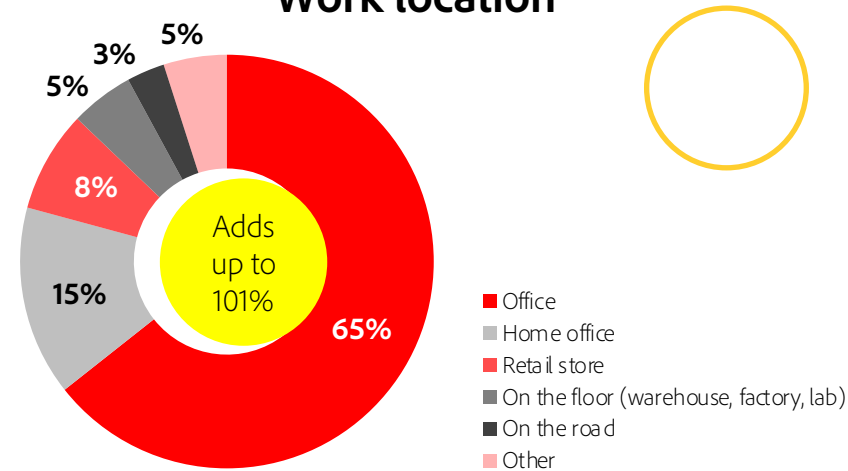
Knowledge workers



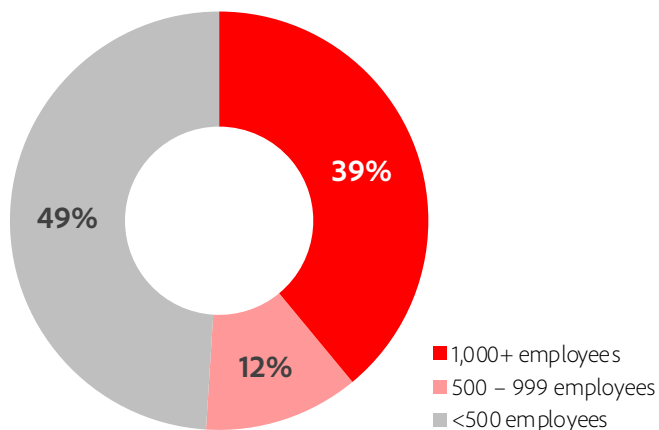
Employment type



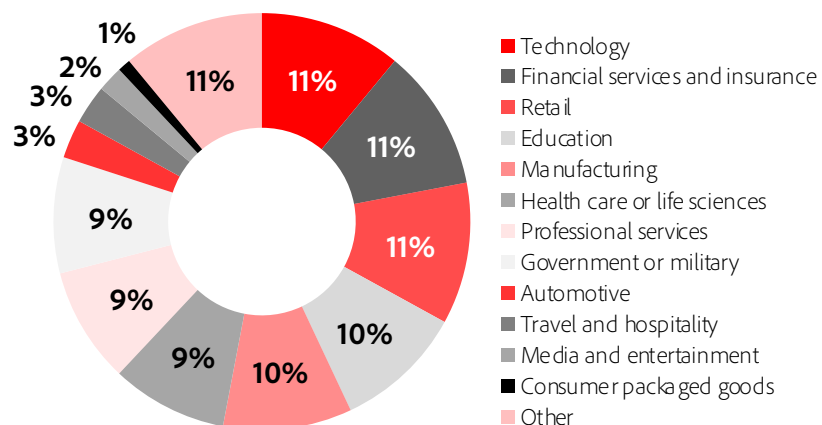
Work location



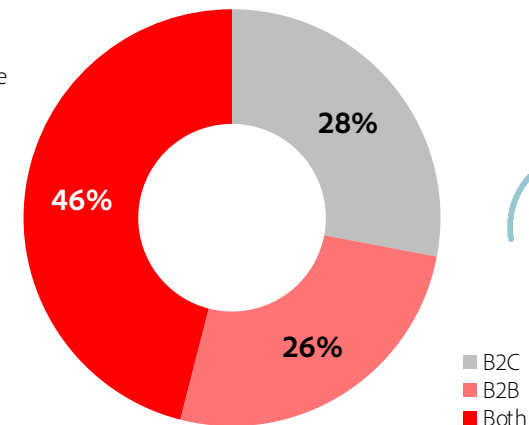
Organisation size



Organisation industry



Organisation segment



End slide.

