



The State of Technology for the Deskless Workforce

80% of the global workforce does not sit behind a desk to do their jobs. For years, these workers have suffered without the same technology as the rest of the workforce.

Companies are increasingly recognizing the impact that technology has on boosting deskless worker productivity and job satisfaction. That said, there are still gaps when it comes to giving deskless workers the technology they need to do their jobs well.

At Emergence, we believe there is a massive opportunity for entrepreneurs to develop better tech for the deskless workforce. Our research in this area is intended to make this opportunity more clear — and in doing so encourage more company creation in this important area.

2020

Introduction

At Emergence, we use the term “Deskless Workforce” in reference to the ~2.7 billion workers around the world who do not sit behind a desk to do their jobs. These workers represent ~80% of all employees. Further, they make up a large percentage of individuals in essential industries that keep our economy running. Employees in sectors such as healthcare, agriculture, construction, retail, manufacturing, and transportation are largely deskless.

Despite the fact that these workers represent such a significant and critical portion of the global workforce, a majority of technology entrepreneurs’ energy has centered on building tools for deskbound workers. As a result, deskless workers have continued to suffer from using clunky technology solutions — or even manual, paper-based processes — to do their jobs. In contrast, workers like those of us in Silicon Valley have benefitted from an ever-expanding range of technology offerings to help us make our jobs more efficient and enjoyable.

It’s time for this to change. In a 2018 survey of IT decision makers across industries with large concentrations of deskless workers, we found that the vast majority of IT buyers planned to increase spending on technology for deskless employees. They cited their desire to improve productivity and employees’ daily experience at work as key reasons for wanting to increase investment in this area.

This year, we wanted to get a view of the state of deskless technology from the perspective of deskless workers themselves. In Q3 of this year, we worked with Centiment to survey 1,532 deskless workers to ask about how technology is, or isn’t, helping them with their daily work — and what they’d like in terms of new tech going forward. What we learned further validated the need for more technology in the deskless world. And it pointed to some additional potential benefits that more technology could provide to this important part of the workforce.

Please Note: For the purpose of the survey, technology refers to any type of hardware or software and some questions were "select all that apply."

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- ↓ **Desire for More Technology**
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- ↓ **Worker Dissatisfaction**
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- ↓ **Technology Drives Job Decisions**
- ↓ **The Tech They Want**

1 Reliance on Technology

Deskless workers are increasingly reliant on technology to do their jobs.

75% of deskless workers we surveyed spend most of their time at work using technology.

75%

SPEND MOST OF THEIR TIME USING TECHNOLOGY



2 Desire for More Technology

Deskless workers understand the value technology brings to their jobs. And they want more of it.

70% of deskless workers surveyed report that more technology would help them do their jobs better. The parts of their work that they feel would benefit most from additional technology include communications, operations & logistics, onboarding, and training.



Employers are primarily providing desk-bound devices to deskless workers, but mobile devices are gaining ground.

Despite not working at a desk, the most common hardware platforms provided to deskless workers are desktop PCs and laptops. In fact, 83% of deskless workers we surveyed are asked to use these less-than-ideal devices to do their work.

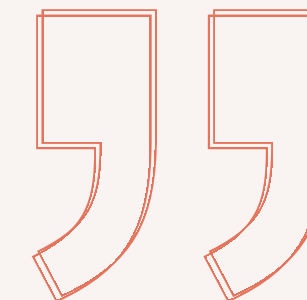
However, in a sign of progress, nearly 60% of deskless workers have access to a smartphone or tablet through their employer.

Newer devices such as smartwatches and drones are still emerging in terms of overall penetration among deskless workers. That said, industries such as construction, manufacturing, real estate, and utilities are using these newer, hands-free platforms more heavily than others.





Those of us in deskbound jobs have received the benefits of great technology for decades. We're more productive, more closely-connected to our colleagues, and have an ability to make a greater difference to the companies we work for. Deskless workers deserve the same.



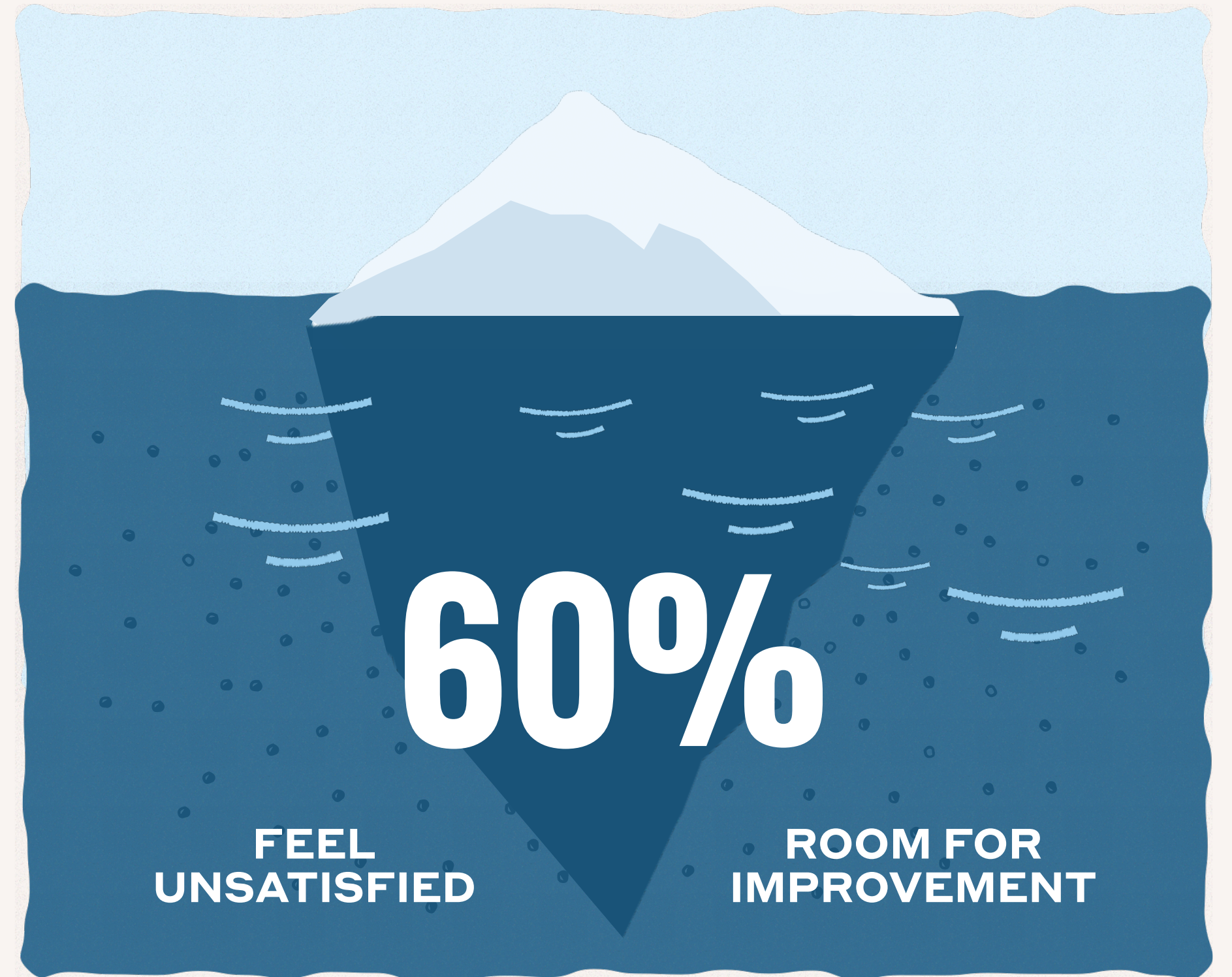
Kevin Spain, Emergence General Partner

4 Worker Dissatisfaction

Deskless workers in essential industries are most dissatisfied with the technology they're given.

Sixty percent of deskless workers we surveyed are unsatisfied with, or believe there is room for improvement in, the technology they're provided to do their work.

Dissatisfaction rates are especially high among employees in construction, education, healthcare, manufacturing, and retail. These industries also happen to be those where employees disproportionately believe that budget constraints limit investment in better technology.



Deskless workers expect more than slow, difficult to use, dated technology.

The top reasons deskless workers we surveyed gave for their dissatisfaction with technology reflect the older devices and software that most are provided. Few employees in Silicon Valley would say the tools they use to do their jobs are “slow,” “inefficient,” or “hard to use.”

This data suggests there’s ample opportunity for entrepreneurs to build companies that simply re-imagine existing deskless software to make it faster and more modern.

44%

Slow

20%

Not Efficient

14%

Hard To Use
And/Or
Understand

14%

Not Available
On A Mobile Device
Or Tablet

12%

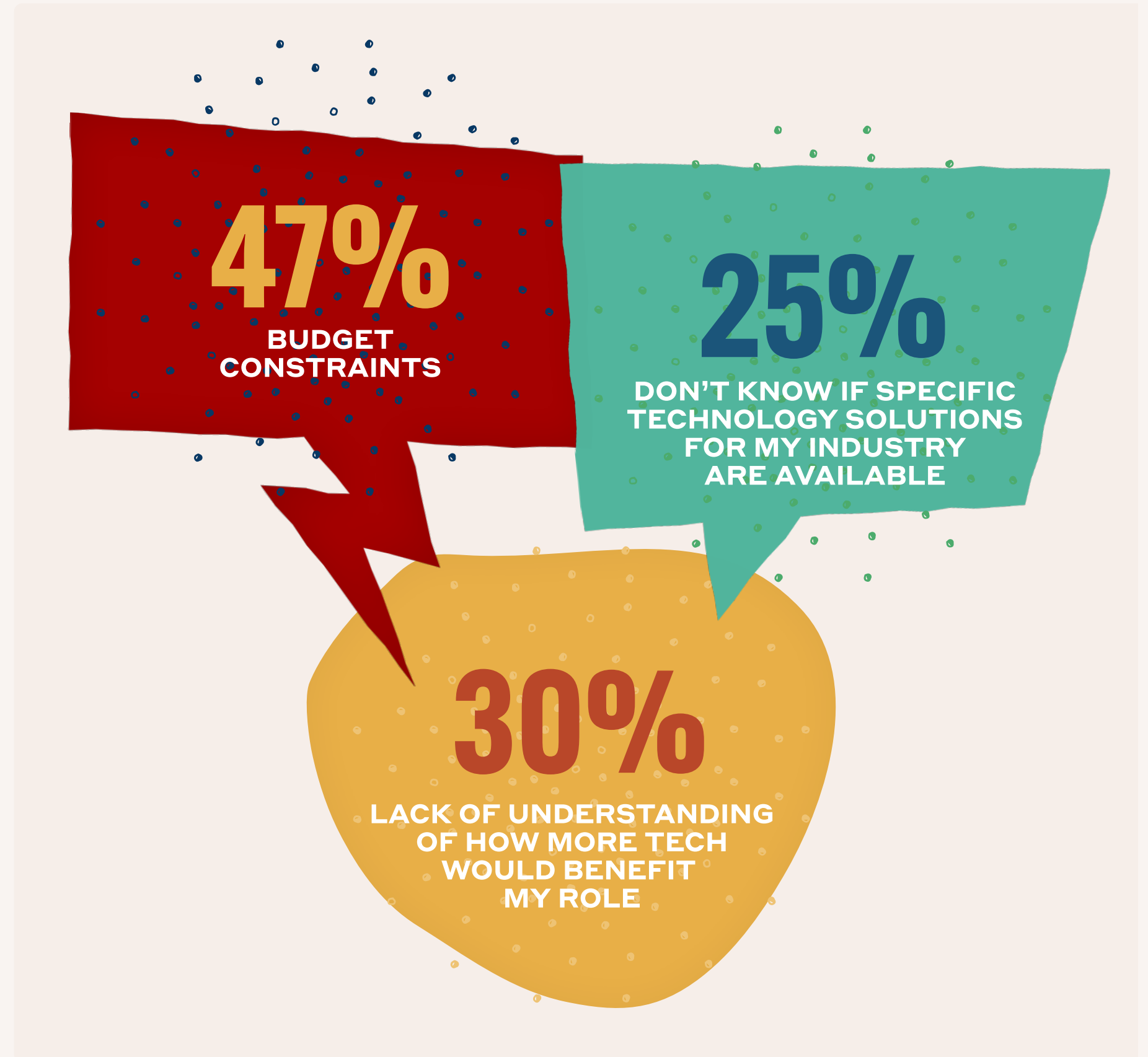
Not Collaborative



**Deskless Workers
Want Great
Software Too**

Most employees believe that their lack of better technology is due to budget constraints and their managers' lack of awareness.

Almost half of deskless workers we surveyed believe that budget constraints prevent their companies from providing them with the best hardware and software. In addition, many feel that their companies don't appreciate how much better technology would help them do their work. And further, there's a sense that their managers may not even know if there are new technology solutions available for their workers.



Frustrated deskless workers are filling the technology gap themselves.

Over half of deskless workers we surveyed have used technology not provided by their employers to perform their jobs. We asked how they found these technologies, and learned:

- Over half have turned to technologies they were already using in their personal lives
- Nearly half learned about a technology from a coworker
- One third proactively sought out new hardware and software specifically for the purpose of helping them do their work better



56%

Deskless workers are using their own technologies to fill the gaps.

While we were planning for this survey, the COVID-19 pandemic struck. Knowing that many deskless-heavy industries would likely be affected by the pandemic, we decided to focus a portion of our survey on how workers' use of technology has changed since the pandemic began.

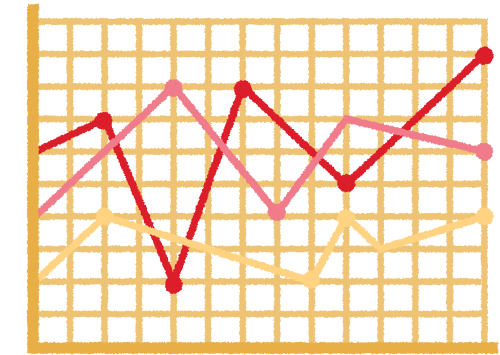
Deskless workers have received few new technology tools during the pandemic

The pandemic is accelerating digital transformation in many industries with large deskless workforces. A significant number of companies are adopting new technology in order to make their businesses more resilient in the current environment and beyond.

That said, since the pandemic began, most deskless workers we surveyed have not been provided with additional technology to do their jobs. This is despite the fact that deskless workers in critical industries such as healthcare, logistics, and manufacturing have seen their workloads increase dramatically during the pandemic.

65%

Have not been provided additional technology to complete their jobs



Technology is a critical factor when deskless workers choose a job.

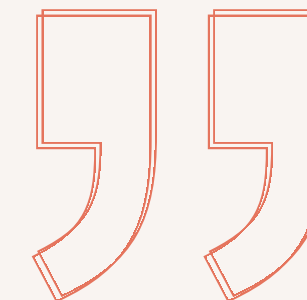
Over $\frac{3}{4}$ of deskless workers we surveyed consider the availability of technology at a company when deciding whether to work there.

Given the high cost of recruiting new employees, and the significant amount of employee turnover that exists in many deskless-heavy industries, companies would be wise to consider how better technology might help them improve their ability to attract and retain deskless workers.





It's hard for most of us to imagine doing our jobs without great software, yet it's a fact of daily life for the nearly three billion deskless workers around the world. This survey gave us the opportunity to hear from them directly, and their message to employers was clear: 'An investment in us is an investment in your future.'



Kevin Spain, Emergence General Partner

Employers, here's the technology your employees want. Entrepreneurs, this is where the greatest deskless opportunities lie.

When asked about the areas of deskless workers' work lives would benefit from more technology, respondents mentioned many things. Interestingly, these areas overlap quite a bit with those that have seen entrepreneurial innovation in the deskbound employee world.



In support for better technology for Deskless Workers

Deskless workers clearly want more and better technology to do their jobs. While employers are making strides to address their workers' needs, a gap still exists between what deskless workers want and the technology they are given.

We believe that the key reason for this gap has been entrepreneurs' lack of understanding of the deskless world. After all, most software developers have never worked in deskless-heavy industries, and as such don't have a clear sense of what type of software would help deskless workers.

However, in recent years, we've found that a new generation of founders is emerging in the deskless market. These founders have spent time in deskless roles themselves — or have worked in companies with many deskless workers. They are teaming up with savvy technologists (or are learning to code themselves) in order to create better software for the deskless world they came from.

The opportunity to create better technology for deskless workers is one of the biggest opportunities for enterprise entrepreneurs today.

If you are interested in speaking with us about our views on the deskless workforce or are an entrepreneur with a deskless technology company, please contact us at desklessworkforce@emcap.com.