# advanced

# Trends Survey Report 2020/21

Trends Survey Report **2020/21**

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# Introduction

Advanced has carried out its fifth Annual Trends Survey for 2020/21, with over 1,000 senior business decision makers having their say on the technology trends and their impact on UK organisations now and in the future. However, this year's report is different from previous reports – and rightly so. We are all in the midst of a global pandemic, which continues to impact the way we live and work.

We have already seen from our 2020 Digital Business Report [1] that working practices have changed in order for businesses to survive Covid-19 and try to limit the spread of the virus. Our new Trends Report explores this further by examining technology's role in global economic recovery and the legacy Covid-19 will leave behind.

More than ever before, organisations are recognising the need to transform digitally if they are to adapt to the evolving needs of their business and the markets they operate in. This is why we have felt it necessary to introduce new questions into our survey this year. With the help of this research, we hope to better understand the leading role that technology has in overcoming such a critical event. The report examines the benefits of transformative technologies – like the Cloud – as we navigate the 'new normal'. We also applaud the many business leaders who have stepped up and instilled greater levels of confidence across the workforce during this turbulent time.

There's no doubt Covid-19, and let's not forget Brexit, will leave a long-lasting imprint on the business community. But, if there's any good we can take from this, it's that we are seeing the acceleration of the shift to a digital-first mindset which will enable agility and future success.

## "Technology has helped individuals, businesses and society to navigate the Covid-19 crisis and it will play a critical role in the economic recovery."

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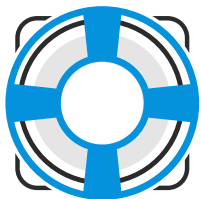**Felicity Burch,** Director of Innovation and Digital, CBI

**Please note:**
Some figures may not add up to 100% due to rounding.
New questions or options introduced this year do not display any previous years' data in the graphs.

# The Highlights

## Technology and its role in global economic recovery

**54**% say business survival during and post Covid-19 will be their spending priority in the next 12 months

**98**% agree technology will play a major role in global economic recovery

**77**% think one of the legacies of Covid-19 will be for their organisation to shift to a digital-first mindset

## Technology and innovation

**46**% say cost will hold their organisation back from modernising its key business processes and systems with new technology
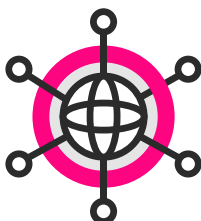
## Workforce

**57**% have seen limitations in their organisation's current technology to support the changes in working practices as a result of Covid-19
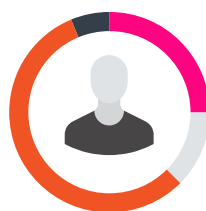
## Cyber security

**36**% say cyber security will be a business spending priority for the next 12 months – a drop from 43%

## Leadership

**82**% are confident in the leadership of their company to bounce back from a crisis

**46**% say the most important attribute for a business leader is to ensure employees have the digital tools to do their jobs productively

# Technology and its role in global economic recovery

Technology has become integral to most businesses for some time but the global pandemic has well and truly thrust it into the limelight. Organisations, both in the public and private sectors, have accelerated their adoption of technology to ensure they can continue serving their customers, and provide the tools their employees need to do their job.

Covid-19 has pushed organisations to operate online – and many are now looking to implement technology solutions that will help them survive and thrive in the long-term.

## What do you believe to be your business spending priorities for the next 12 months?

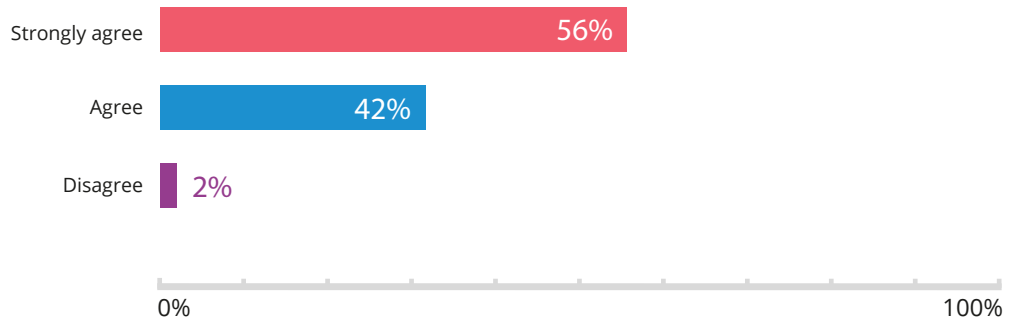| Category | Value |
|---|---|
| Business survival during and post Covid-19 | 54% |
| Remote and flexible working | 42% |
| Staff wellbeing | 38% |
| Cyber security | 36% |
| Cloud software | 32% |
| Skills development | 30% |
| Technology | 27% |
| Environmental, Social and Governance (ESG) | 21% |
| Recruitment | 21% |
| Marketing | 20% |
| Research and development | 18% |
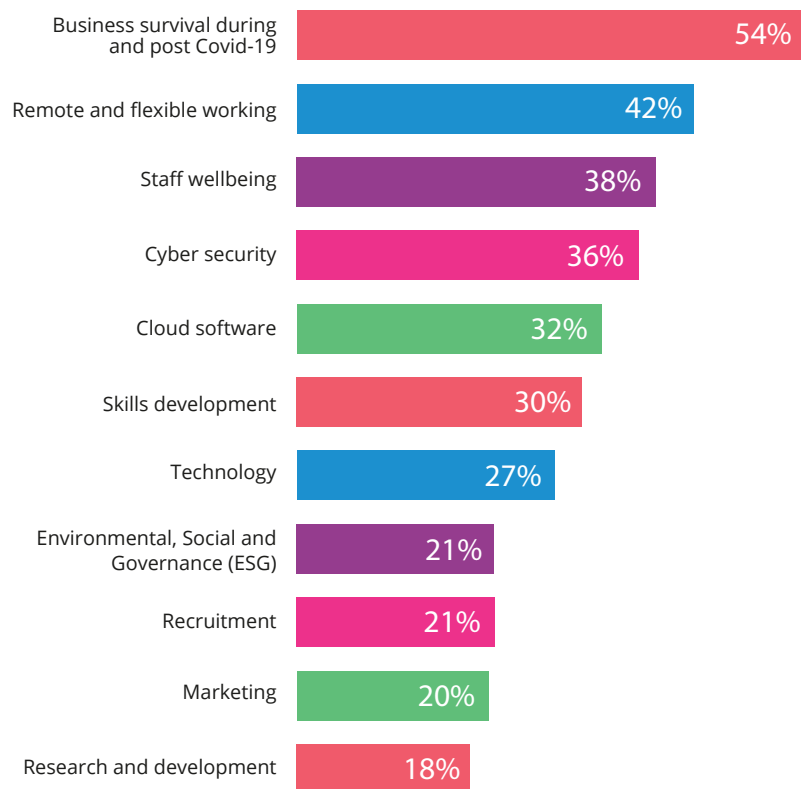
Our survey suggests that, over the next year, organisations will be prioritising business survival in conjunction with technology adoption. More than half (54%) of respondents say business survival during and post Covid-19 will be their spending priority for the next 12 months, on a par with prioritising Cloud software and other technology (59%).

This is followed by remote and flexible working, which at 42% is a reflection of the changing working practices brought on by the pandemic. Cloud software, which enables remote and flexible working, has been hugely successful in helping organisations continue to operate and forge effective new processes and initiatives during the pandemic. While overall IT spending is in decline, Gartner forecasts the public Cloud services market to grow by 6.3% in 2020 [2] with Software-as-a-Service (SaaS) retaining its spot as the largest market segment thanks to the increased need for new software collaboration tools during Covid-19.

Technology aside, 38% of organisations will prioritise staff wellbeing. While this figure is low – arguably because organisations are focused on survival right now – it's reassuring to see some business leaders are recognising the need to ensure employees have emotional support and a healthy work / life balance.

How far do you agree with the following statement: "I feel that technology will play a major role in global economic recovery"?

| | |
|---|---|
| Strongly agree | 56% |
| Agree | 42% |
| Disagree | 2% |

0%                                                                      100%

Covid-19 has fundamentally disrupted the way the world does business – and we have already seen many organisations change their business models to adapt to the current situation. The impact of the pandemic has demonstrated the need for organisations to create more flexible and responsive ways of working. They are also having to trust, support and empower employees in managing their competing priorities.

Technology is a key enabler for these new practices and 98% of business decision makers we spoke to believe it will play a major role in global economic recovery.

Organisations that invest in the right technology to support their business goals and the needs of their customers could emerge from the pandemic with more resilience, confidence and understanding of their markets and how best to serve them.

Do you think one of the legacies of Covid-19 will be for your organisation to accelerate the shift to a digital-first mindset?

| | |
|---|---|
| Yes | 77% |
| No | 12% |
| Do not know | 11% |

0%                                                                      100%
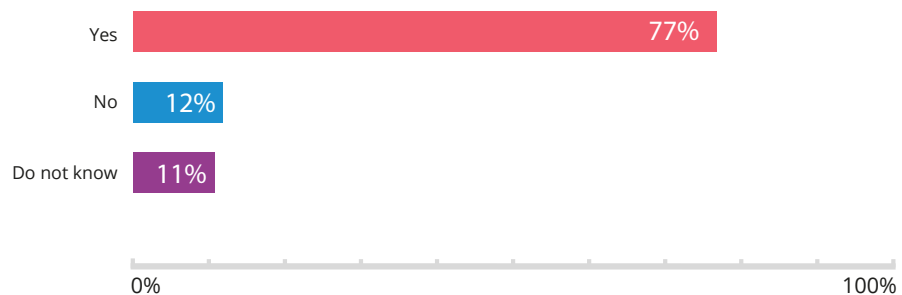
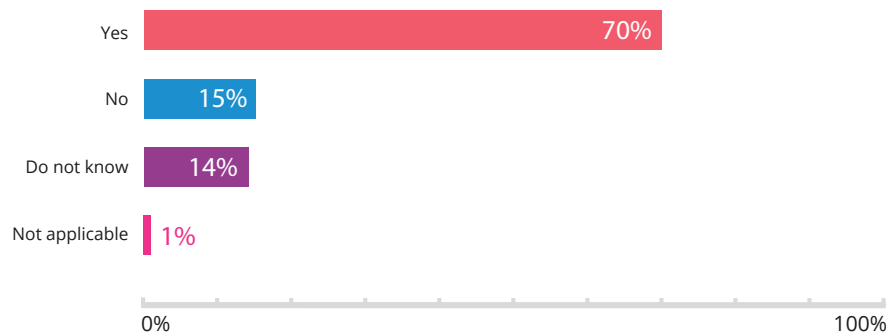While we can't predict when the pandemic will be over, we do know it will leave many lasting and complex legacies.

More than three quarters (77%) of our survey respondents say one of these legacies will be for their organisation to accelerate the shift to a digital-first mindset. Interestingly, this figure increases to 90% for the digitally native 18-24 year olds who have always used technology.

Overnight, many organisations have been forced to implement digital business processes in favour of traditional ones. This means fewer paper-based processes and hours spent on laborious administrative tasks. Now, many businesses are looking at this investment in technology solutions to see how they can build on it further to increase efficiencies and drive productivity going forward.

Are you confident the technology within your organisation is optimised to enable business recovery?

So we know that technology has a vital role to play in economic recovery, but some organisations are further along the path to becoming digital-by-default than others. 70% of respondents are confident the technology within their organisation is already optimised to enable business recovery. For those that aren't, we will take a look at some of the barriers they may be experiencing later in this report.

| | |
|---|---|
| Yes | 70% |
| No | 15% |
| Do not know | 14% |
| Not applicable | 1% |

0%                                                                100%

"Technology is key to moving through our ever-changing world of work. It will play a huge role in our economic bounce back and needs to be a part of business strategies in response to the virus and changing regulations."

**James Hallahan,** Director – IT & Digital Technology, Hays UK & Ireland

"Covid-19 has changed everything. If we want to increase business resilience and support sustainable livelihoods, we need to encourage businesses to adopt the digital tools that will be needed to allow them to adapt to the new economy."

**Neil Ross,** Policy Manager, techUK
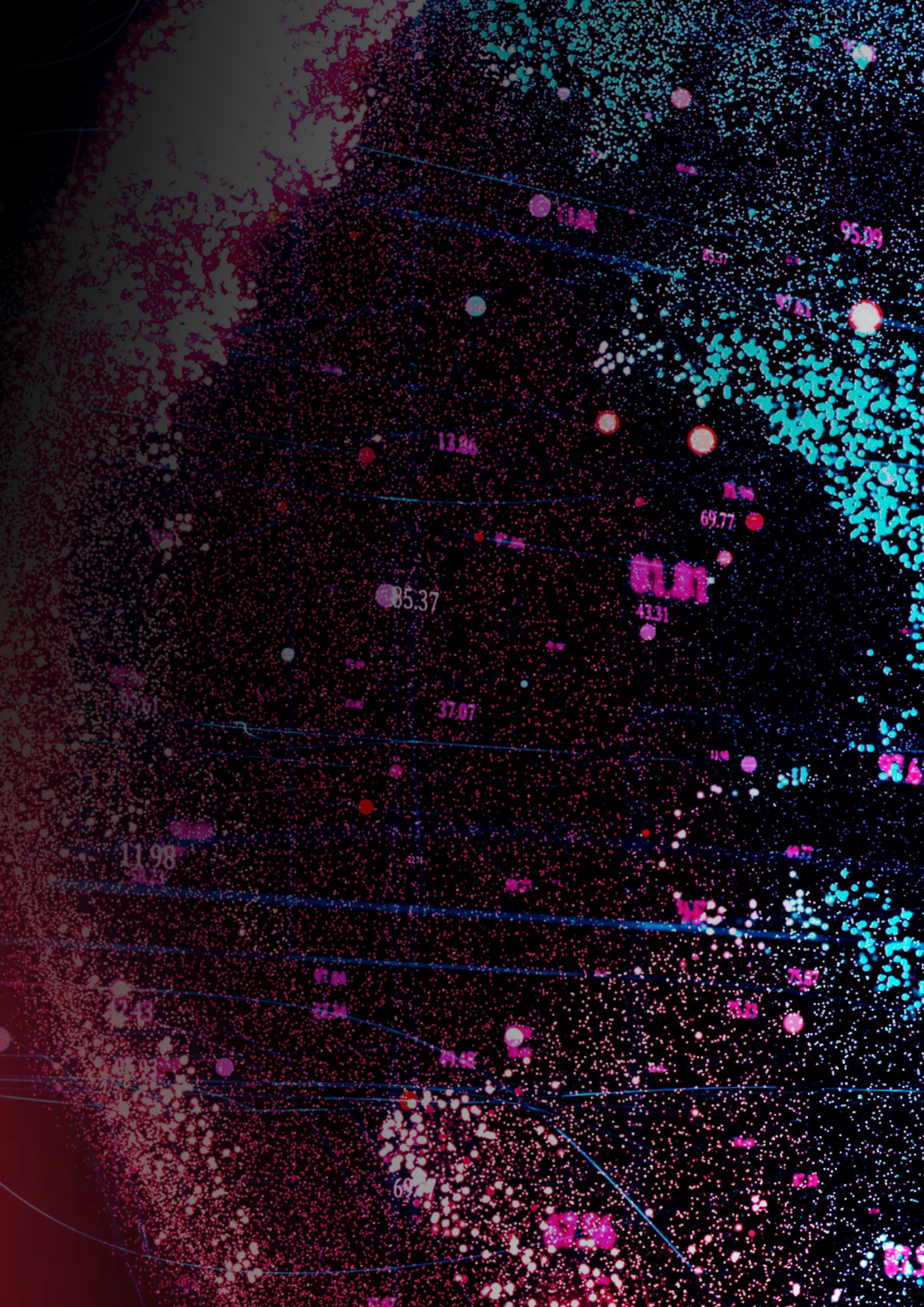
# Technology and innovation

Organisations are already investing in technology to deliver intelligent business insight and drive workforce productivity. The level of digitalisation varies across industries, and this variation is evident in the way different companies have been able to initially respond to the impact of Covid-19.

Some sectors such as healthcare and financial services have had no choice but to accelerate technology adoption. Meanwhile, some organisations outside of these sectors have had the foresight to implement technologies that will prepare them to tackle almost any change in economic conditions that come their way. In the legal sector, for example, we have seen courts introduce paperless bundles which has helped practitioners better prepare for remote working.

Which of the following describes your IT software and services?
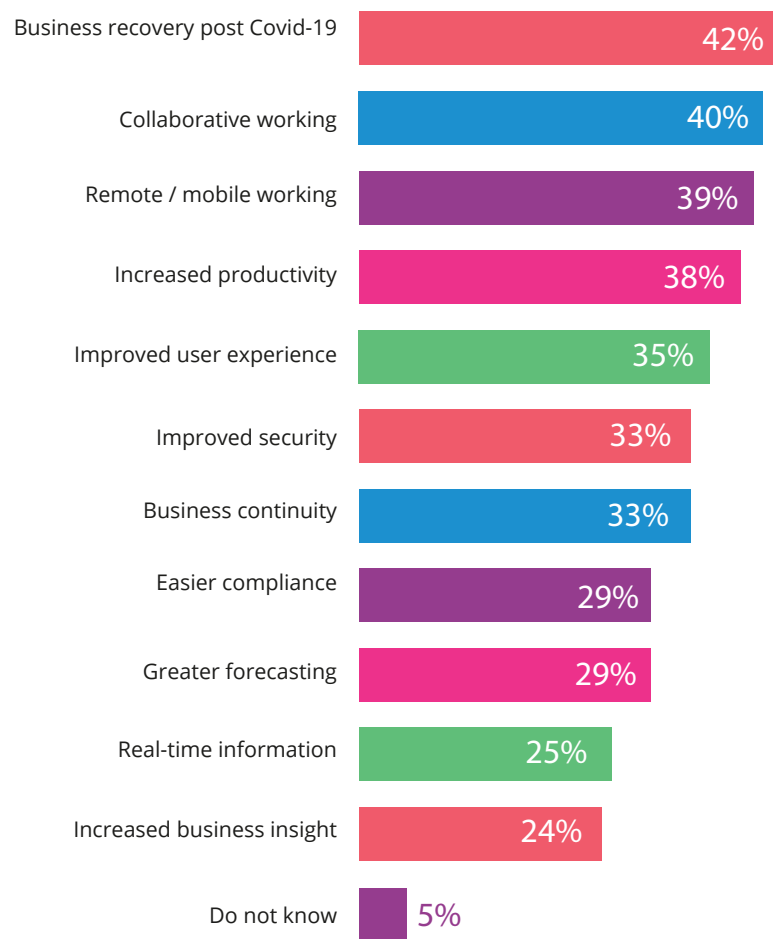
| | |
|---|---|
| It gives me the right tools to do my job effectively | 55% |
| It gives me the right tools to do my job remotely | 50% |
| It enables collaboration | 44% |
| It gives me the Business Intelligence I need to make the right decisions | 37% |
| It is able to provide a connected and real-time view of the business | 22% |
| It has been modernised to allow for AI (Artificial Intelligence) / ML (Machine Learning) | 21% |
| None of the above | 5% |

Just over a half of our survey respondents (55%) say their IT software and services give them the right tools to do their job effectively, while 50% say they enable them to do their job remotely. Worryingly, only 44% say their software and services enable collaboration, something that has become increasingly important this year in improving efficiency and keeping colleagues in touch while working remotely.

What's even more concerning is just 22% say their IT software and services give them a connected and real-time view of the business – a drop from 32% last year. This suggests many of the tools in place are no longer fit for purpose given that employees are now working from home and, most likely, do not have full access to their organisation's network. It has exacerbated the risks associated with working in siloes, creating a disconnect which will only thwart productivity and decision making in future and leave organisations vulnerable to the competition.
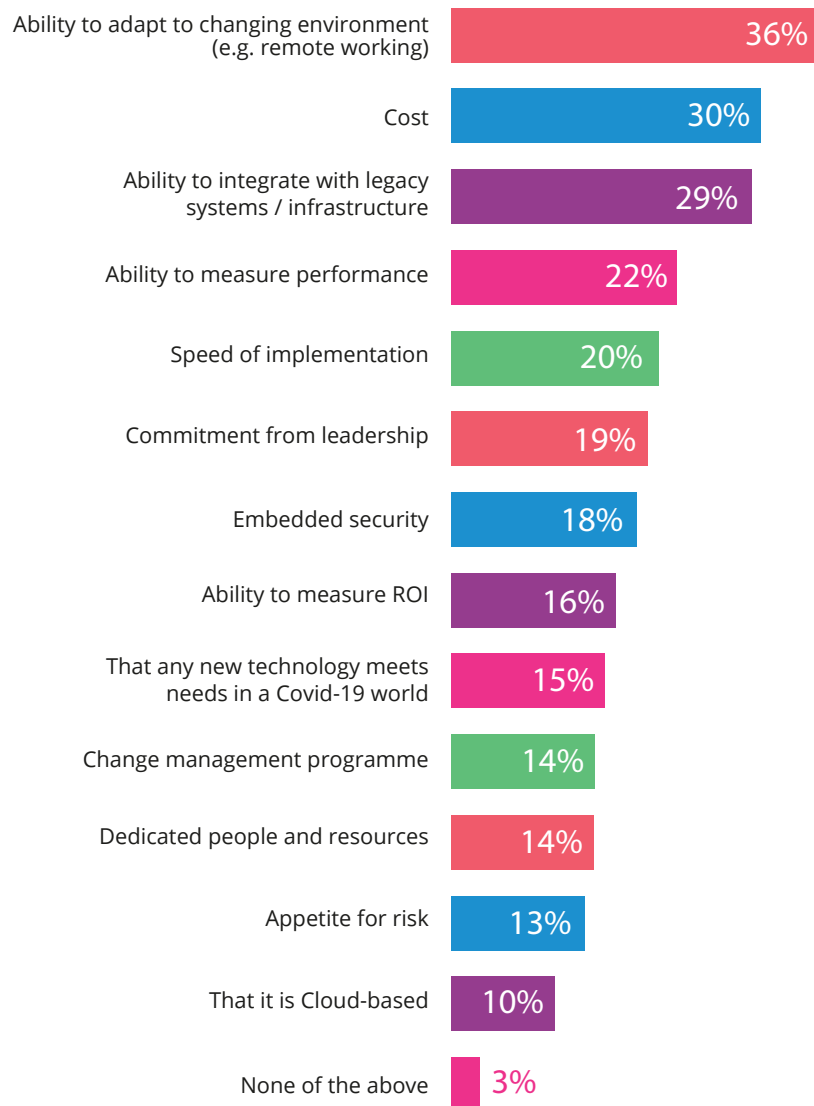
What will you benefit from most when adopting new and innovative technologies?

| Benefit | Percentage |
|---|---|
| Business recovery post Covid-19 | 42% |
| Collaborative working | 40% |
| Remote / mobile working | 39% |
| Increased productivity | 38% |
| Improved user experience | 35% |
| Improved security | 33% |
| Business continuity | 33% |
| Easier compliance | 29% |
| Greater forecasting | 29% |
| Real-time information | 25% |
| Increased business insight | 24% |
| Do not know | 5% |

More than two fifths (42%) of decision makers in the UK organisations we spoke to believe that by adopting new and innovative technologies they will benefit most from business recovery post Covid-19. This benefit is closely followed by collaborative working (40%), remote and mobile working (39%), increased productivity (38%) and improved user experience (35%).

However, these figures vary with the requirements of each sector. For example, over half (55%) of those respondents working in the legal sector say they will benefit most from collaborative working and increased productivity when adopting new and innovative technologies. Meanwhile, 53% say they will benefit from improved user experience. This comes as no surprise when we consider that judges and lawyers have had to work from home and courtrooms have become virtual. In April 2020, the UK Government introduced new video technology to support remote hearings in court [3], helping to keep the justice system moving during the pandemic.
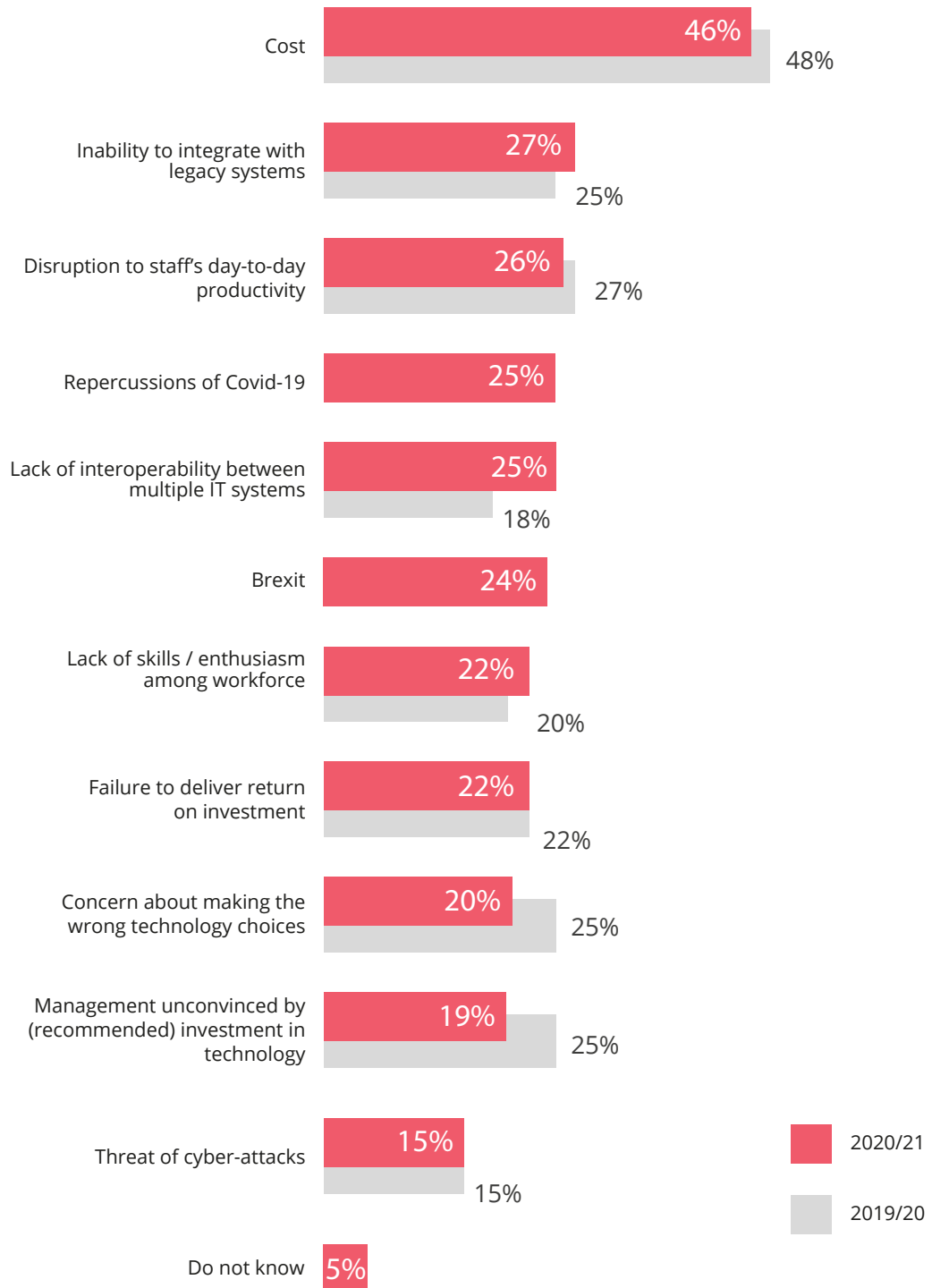
Which of the following is most important when developing and adopting innovative technologies?

| Category | Percentage |
|---|---|
| Ability to adapt to changing environment (e.g. remote working) | 36% |
| Cost | 30% |
| Ability to integrate with legacy systems / infrastructure | 29% |
| Ability to measure performance | 22% |
| Speed of implementation | 20% |
| Commitment from leadership | 19% |
| Embedded security | 18% |
| Ability to measure ROI | 16% |
| That any new technology meets needs in a Covid-19 world | 15% |
| Change management programme | 14% |
| Dedicated people and resources | 14% |
| Appetite for risk | 13% |
| That it is Cloud-based | 10% |
| None of the above | 3% |

The benefits also align with what organisations see as key priorities when developing and adopting new technologies. Unsurprisingly, more than a third (36%) of our respondents say the ability to adapt to a changing environment is most important. Many employees are working remotely for the foreseeable future and it's those early adopters of technology that will be able to support flexible working, and respond to rapid changes in market demand.

However, any new technology must work alongside existing software, and 29% of respondents told us the ability to integrate with legacy applications and infrastructure is most important when developing and adopting innovative technologies. Many organisations are still deeply entrenched in legacy systems, and these can be complex to connect with modern technology such as the Cloud, limiting the options for digital transformation.

What would hold your organisation back from modernising its key business processes or systems with new technologies?

Cost
**46%**
48%

Inability to integrate with legacy systems
**27%**
25%

Disruption to staff's day-to-day productivity
**26%**
27%

Repercussions of Covid-19
**25%**

Lack of interoperability between multiple IT systems
**25%**
18%

Brexit
**24%**

Lack of skills / enthusiasm among workforce
**22%**
20%

Failure to deliver return on investment
**22%**
22%

Concern about making the wrong technology choices
**20%**
25%

Management unconvinced by (recommended) investment in technology
**19%**
25%

Threat of cyber-attacks
**15%**
15%

Do not know
**5%**

■ 2020/21
■ 2019/20

Our research confirms that, for some organisations, integration is indeed a barrier to modernising key business processes or systems. Nearly a third (27%) believe this inability to integrate modern and legacy applications will limit their organisation, while 25% point to a lack of interoperability between multiple IT systems as a stumbling block.

A quarter fear the repercussions of Covid-19 will hold their organisation back from modernising its key business processes or systems with new technologies, while 24% think Brexit will. These are clearly external influences that businesses have a limited amount of control over. However, technology can be an enabler when dealing with these events, delivering the ability to react with agility and to streamline operations.

Cost is perceived to be the biggest barrier of all though, with nearly half (46%) saying it will hold them back from modernising key business processes and systems. However, because the Cloud can offer the flexibility and resilience organisations so desperately need, in a model that allows for the easy scaling of costs up and down, it can in fact be more affordable than on-premise technology.
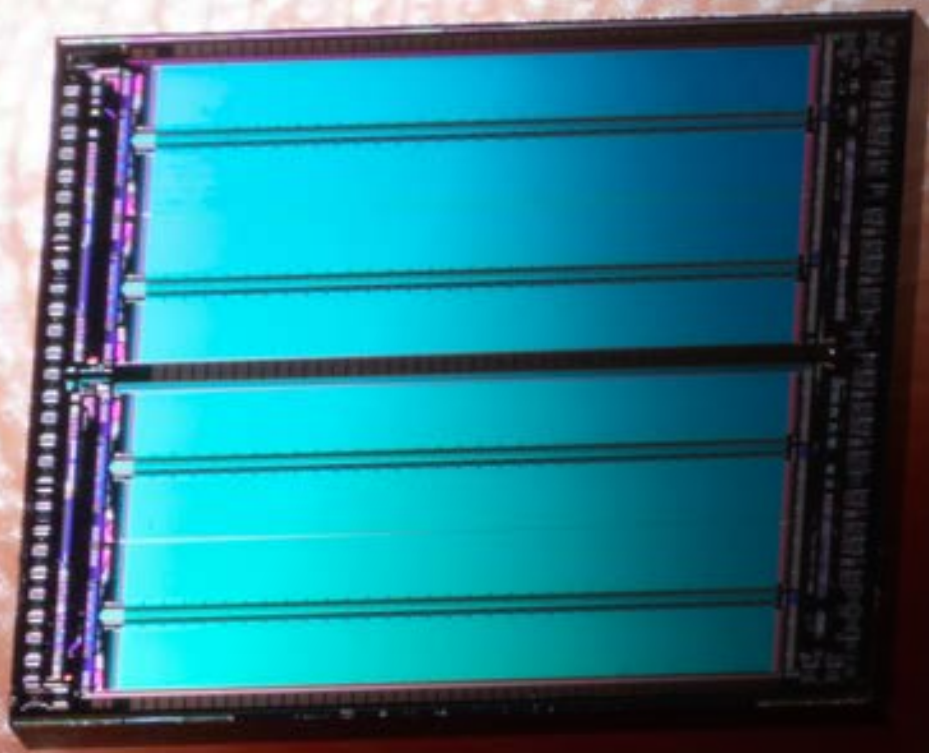
"For business, one positive, lasting legacy of this time will be the increased appetite for digital adoption. This has the potential to be the start of a great digital transformation, but many businesses will be held back by the cost of making new investments at a time when cash is tight. Companies must therefore have a laser focus on the end goal they want to achieve, engage their staff to understand their needs, and work with suppliers to ensure the product meets their requirements."

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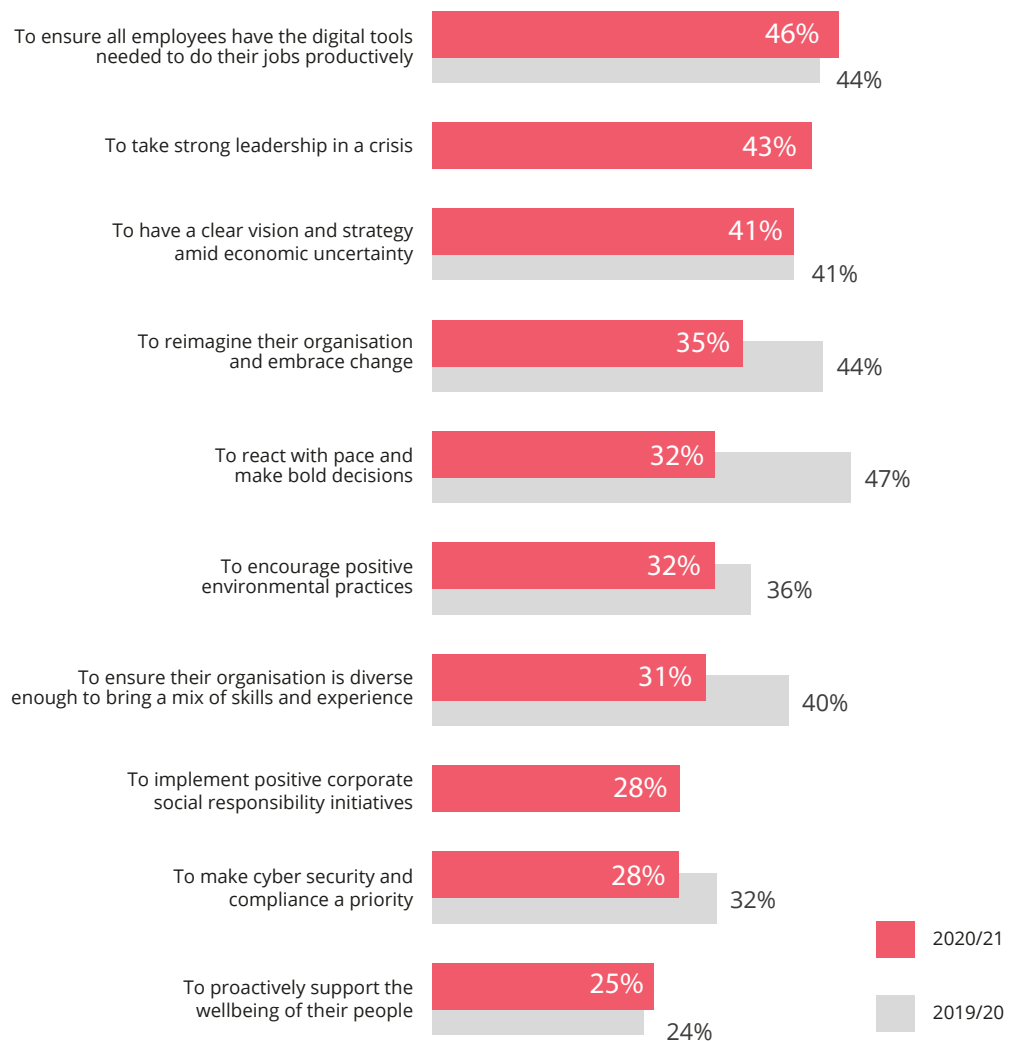**Felicity Burch,** Director of Innovation and Digital, CBI

# Leadership

Covid-19 has placed extraordinary pressure on business leaders in every size of organisation and in every industry. Several months on, and many leaders continue to grapple with their organisation to ensure it is responsive and agile, and that, ultimately, it will stay afloat.

It is gratifying to see from the results of our survey that many leadership teams have stepped up and taken effective action to help minimise the damaging effects the pandemic continues to have on their organisation and  workforce.

What do you think are the most important attributes for a business leader in the digital era?

| Attribute | 2020/21 | 2019/20 |
|---|---|---|
| To ensure all employees have the digital tools needed to do their jobs productively | 46% | 44% |
| To take strong leadership in a crisis | 43% | |
| To have a clear vision and strategy amid economic uncertainty | 41% | 41% |
| To reimagine their organisation and embrace change | 35% | 44% |
| To react with pace and make bold decisions | 32% | 47% |
| To encourage positive environmental practices | 32% | 36% |
| To ensure their organisation is diverse enough to bring a mix of skills and experience | 31% | 40% |
| To implement positive corporate social responsibility initiatives | 28% | |
| To make cyber security and compliance a priority | 28% | 32% |
| To proactively support the wellbeing of their people | 25% | 24% |

■ 2020/21
□ 2019/20

Nearly half (46%) of our survey respondents say the most important attribute for a business leader in the digital era is to ensure all employees have the digital tools they need to do their jobs productively – hitting the top spot for the first time. This comes as no surprise as many teams continue to work remotely and are therefore increasingly dependent on technology to enable them to communicate with each other, and with their customers, virtually. What's more, they are reliant on technology integrating with office systems for visibility.

Meanwhile, 43% say the most important attribute is to take strong leadership in a crisis and 41% say it's to have a clear vision and strategy amid economic uncertainty. Both are a reflection of the times we live in, as business leaders do all they can to meet customer needs, create new opportunities and preserve jobs.

However, the focus on business survival could be to the detriment of employee wellbeing. Only 25% of our survey respondents say the most important attribute for a business leader is to

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support the wellbeing of their people. It's a sobering statistic – and one that mustn't be ignored. The pandemic has impacted our mental health, with a rise in levels of loneliness and isolation, stress and depression.

The charity Mind has revealed the [scale of the impact of the pandemic](#)[4] on people with mental health problems, while the World Health Organisation (WHO) has urged that substantial investment is needed to [avert a mental health crisis](#)[5]. So, while business leaders are doing a great job at implementing technology to help employees do their jobs effectively, they must also use it to establish effective communications, enable colleagues to easily keep in touch, and ensure there are processes in place to support wellbeing.
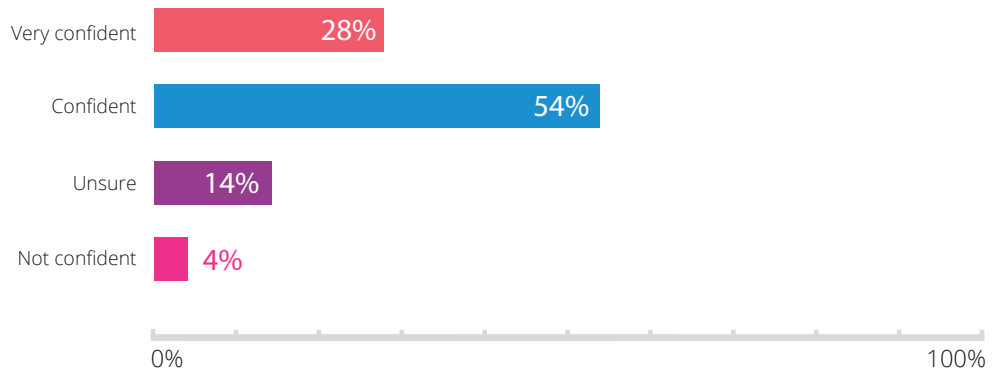
If a robot had access to the right business intelligence, do you believe it would be better at decision making than your boss / senior leadership team?
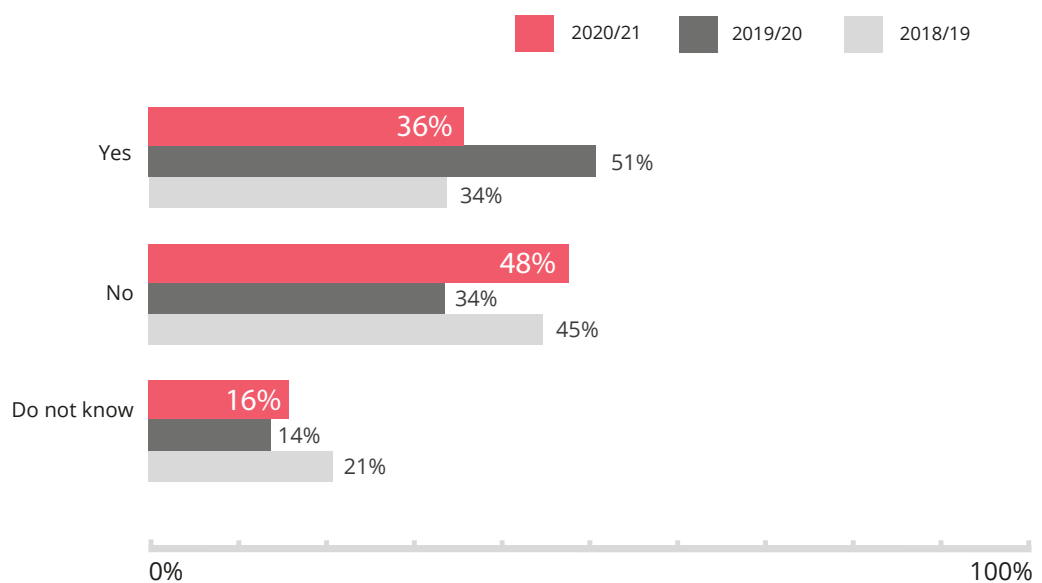


Last year, only 34% of respondents felt their boss would be better at decision making than a robot if it had access to the right business intelligence. This year, almost half (48%) think their boss would be better at decision making, demonstrating increasing levels of confidence in leadership teams and a recognition of the importance of human intuition, ingenuity and empathy at times of crisis.

While we needn't expect robots to enter the boardroom anytime soon, business leaders are already relying on other innovative technologies to drive and influence their decision making. This includes Cloud software and services, business intelligence, automation and predictive analytics.

How confident are you in the leadership of your company to bounce back from a crisis?

| | |
|---|---|
| Very confident | 28% |
| Confident | 54% |
| Unsure | 14% |
| Not confident | 4% |

0%                                                                100%

It is reassuring to see that 82% are confident in the leadership of their company to bounce back from a crisis. This is a great endorsement of our business leaders. Like the rest of the workforce, many CEOs and directors have been working from home, and we are all getting used to seeing each other outside of a workplace environment. It has perhaps helped the leadership team to be seen as more accessible and communicative, and has allowed them to demonstrate empathy and shared human experience. This seems to have had a very positive effect in building confidence in, and support for, those running the business.

"Upskilling has also been identified as a hugely important part of economic recovery in the long run – as well as filling immediate skills gaps. Technology has a crucial role to play in ensuring that training can be undertaken remotely and is just as engaging and effective as it would be in person."

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**James Hallahan,** Director – IT & Digital Technology, Hays UK & Ireland

"We must support businesses to invest in new digital solutions, encouraging and empowering business leaders to pioneer their own digital transformations and providing products which workforces can buy in to, supporting innovation and productivity growth."

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**Neil Ross,** Policy Manager, techUK

# Workforce

The pandemic, and its impact on business, has tested the many new and existing technologies that organisations have in place. It has imposed huge changes to the way people work and highlighted any lack of tools, systems or infrastructure that are now required to support a virtual mobile workforce.

What's clear from our research is that businesses are not always providing the best tools for their employees. In some areas, technology is falling short of expectations and preventing people from working to the best of their ability.
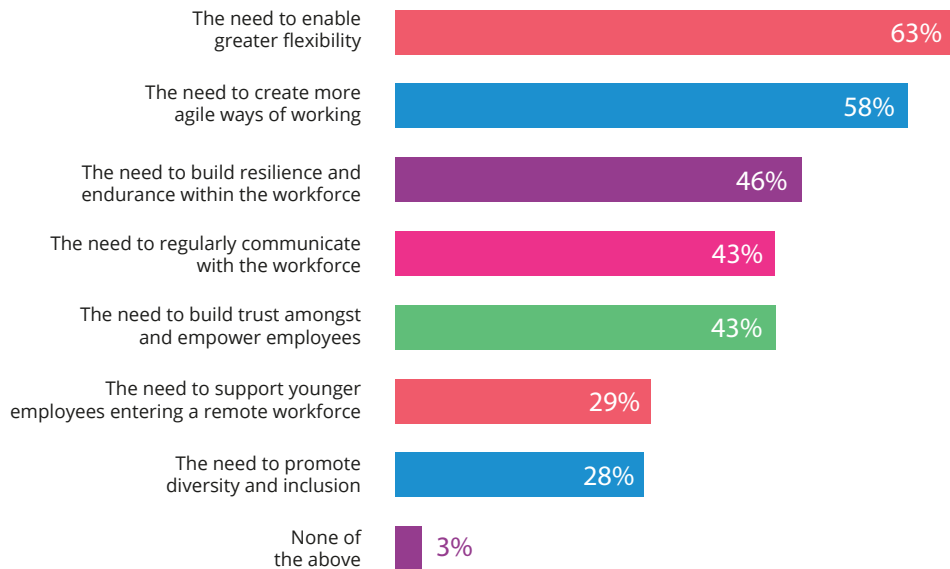
Have you seen limitations in your organisation's current technology to support the changes in working practices that have come about as a result of Covid-19?

| | |
|---|---|
| Yes | 57% |
| No | 35% |
| Do not know | 8% |

0%                                                 100%
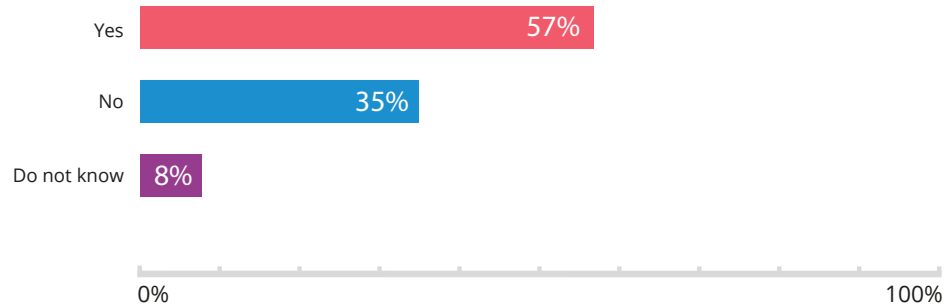
More than half of respondents (57%) admit they have seen limitations in their organisation's current technology to support the changes in working practices that have come about. The sudden and unexpected requirement to work remotely has highlighted weaknesses in current technologies and, as such, has forced organisations to accelerate technology adoption so that productivity isn't adversely affected. Those who have been slower to weave modern technology solutions into their operations have struggled.
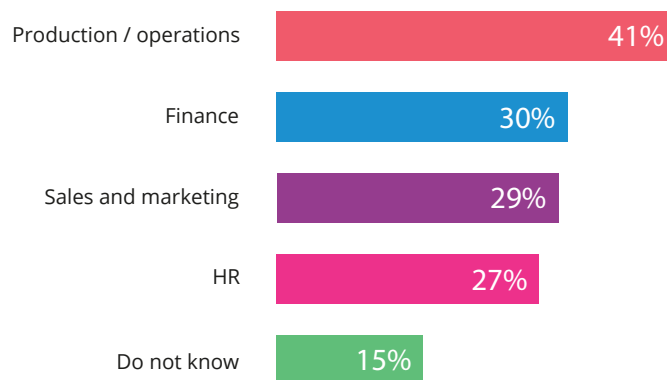
Which of the following have the implications of Covid-19 demonstrated amongst your workforce?

| | |
|---|---|
| The need to enable greater flexibility | 63% |
| The need to create more agile ways of working | 58% |
| The need to build resilience and endurance within the workforce | 46% |
| The need to regularly communicate with the workforce | 43% |
| The need to build trust amongst and empower employees | 43% |
| The need to support younger employees entering a remote workforce | 29% |
| The need to promote diversity and inclusion | 28% |
| None of the above | 3% |

Two thirds (63%) of our survey respondents say Covid-19 has demonstrated the need to enable greater flexibility among the workforce. More than half (58%) say it has highlighted the need to create more agile ways of working. This is followed by the requirement to build resilience and endurance within the workforce (46%), to regularly communicate with the workforce (43%) and to build trust (43%). This shows that organisations recognise the importance of helping the workforce transition to the new way of working, using technology as a key enabler.

Worryingly, only 29% say the pandemic has demonstrated the need to support younger employees entering the workforce. This generation, our future workforce, must not be forgotten. More than ever, organisations must prioritise helping young people in building skills and confidence as they tackle their first role amid very challenging conditions. Managers should be provided with tools to enable greater interaction, transparency and support among the people that need it most.

If Covid-19 has accelerated technology adoption in your organisation's core business functions, which of the following functions have been accelerated the most?

| Function | Percentage |
|---|---|
| Production / operations | 41% |
| Finance | 30% |
| Sales and marketing | 29% |
| HR | 27% |
| Do not know | 15% |

It's evident from our report that Covid-19 has accelerated the adoption of new technologies for many organisations and within many business functions. For example, production and operations have seen an acceleration according to 41% of respondents. Manufacturers have increased investment in automation initiatives to improve efficiencies while, according to McKinsey and Company, around a quarter are fast-tracking automation solely to stem the worker shortages arising from Covid-19 [6].

What's surprising, however, is that just 27% say Covid-19 has increased the adoption of technology in HR. Combined with the fact that only 40% of organisations have a digital HR strategy in place – according to our 2020 Digital Business Report [1] – it seems that more needs to be done. The pandemic has placed huge demands on workforce management, with HR teams under additional pressures to manage sickness, self-isolation, staff on furlough, job support schemes and redundancies.

Organisations need to make use of software that will support HR teams and help them streamline key processes. There is also an enormous opportunity for technology to remove some of the administrative burden by empowering employees to self-serve remotely.
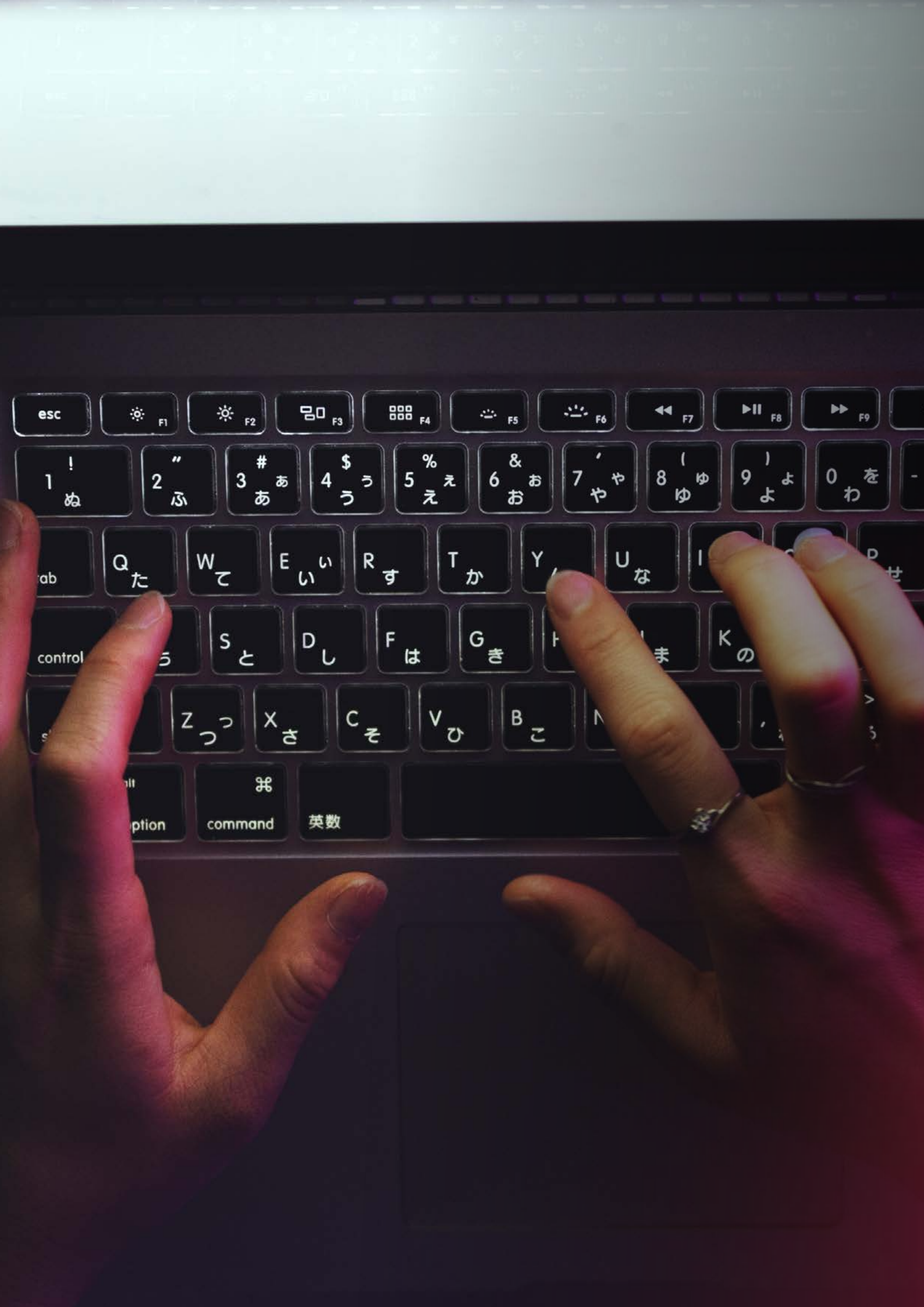
What is the attitude of people within your organisation to the adoption of new technology?

| | |
|---|---|
| They are open to learning about what new technology can offer them | 40% |
| They are keen to adopt new technology | 25% |
| They are worried / concerned about change | 20% |
| They show resistance and want to work their own way | 8% |
| They are sceptical about the benefits | 3% |
| Do not know | 4% |
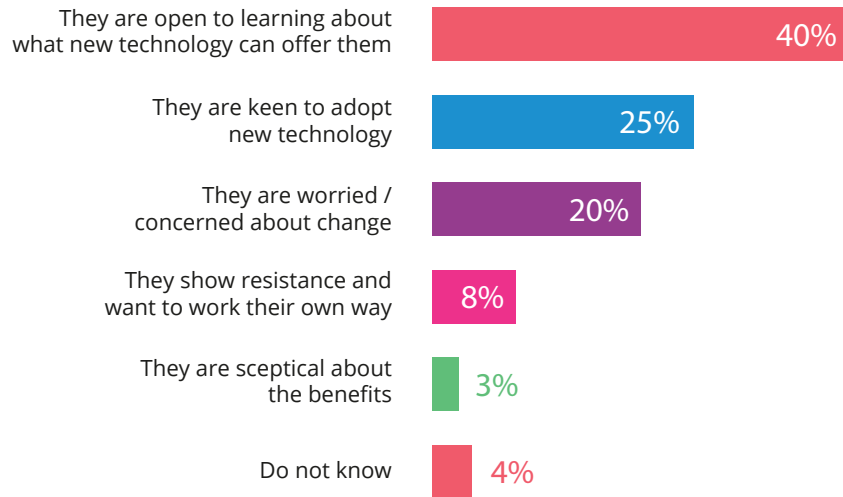
Reassuringly, the appetite for the workforce to use new technology is there with 65% of respondents saying their colleagues within the organisation are either keen to adopt, or open to discovering, new technology. This breaks down to 25% already keen to adapt to new technology – a figure that doubles for 18-24 year olds – and 40% who are open to learning about what new technology can offer them.

However, 20% are still worried or concerned about change when adopting new technology. There's a job to be done in educating some employees as to the benefits innovation will bring and ensuring there is willingness to embrace this change.

People need to understand how the tools they are given will make their jobs easier and better or they will  want to revert to their old ways of working. This will be problematic given the evolving working practices that now need to take place as we adapt to the impact of the pandemic.

"Professionals are drawn to working for organisations which are ahead of the curve when it comes to tech. Employers who provide the technology to staff planning to work remotely on a full-time basis will stand out as an employer of choice. But as well as providing the tech, employers need to provide the training to use it – for new and existing employees alike."

**James Hallahan,** Director – IT & Digital Technology, Hays UK & Ireland

"We have been able to move our staff to working from home in just a few days, build real-time Trust-wide dashboards of Covid-19 cases and redeploy staff while ensuring they rapidly have the access to information they would need for their new roles."

**Bill Fawcett,** Chief Information Officer, Leeds and York Partnership NHS Foundation Trust

# Cyber security

Organisations' preparedness for a cyber-attack is a common theme throughout all of our reports. After all, every business – and indeed employee – is at risk of becoming victim to an attack. The question is – how have attitudes to cyber security changed during the course of this year?

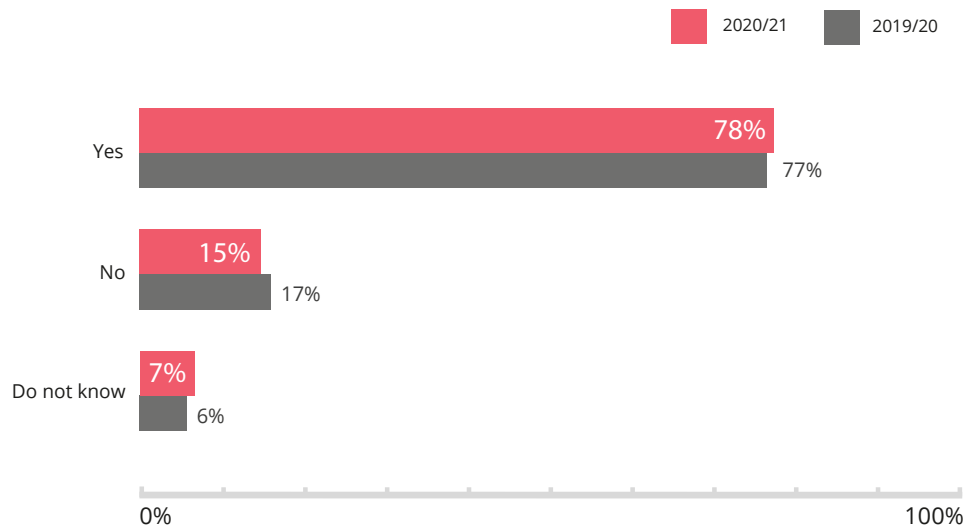Is your organisation prepared for a potential cyber-attack?
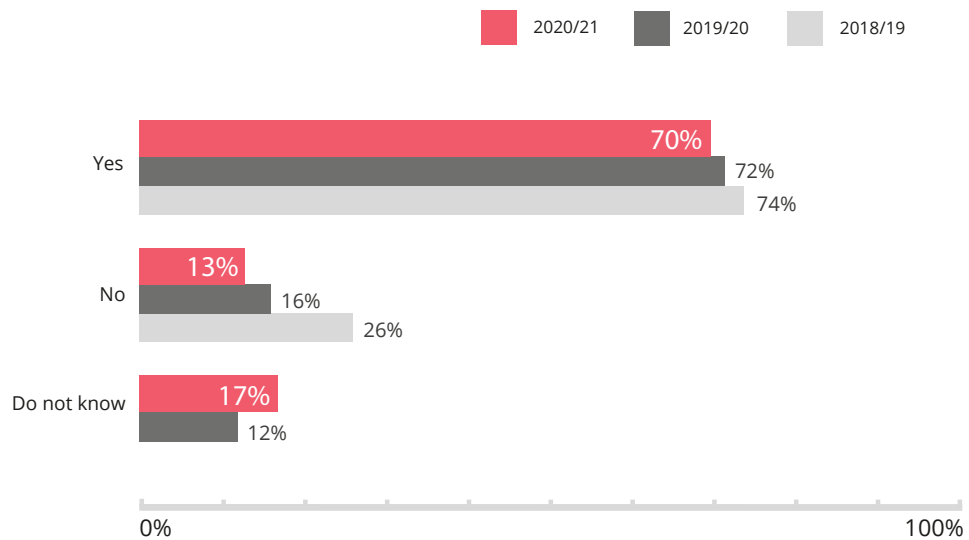


According to our report, the majority of organisations (70%) are prepared for a potential cyber-attack. It's a slight drop from last year, at 72%, and shows that little progress has been made.

There are signs this lack of progress will continue into 2021 too. Only 36% say cyber security will be a business spending priority for the next 12 months – quite a drop from 43% last year. It's a cause for concern. Covid-19 has potentially distracted organisations from investing in cyber security, which is actually critical given the pandemic has opened up a number of new security risks.

Cyber criminals have been capitalising on the health crisis by targeting organisations that have implemented new technologies to facilitate remote working. They have also been focusing on individuals working at home from their own mobile devices and laptops, which are less secure. As such, INTERPOL has seen an alarming increase in online scams and phishing, ransomware and misinformation [7]. What's more, it anticipates a second wave of attacks when a vaccine is available with a spike in phishing emails related to these medical products.

It's therefore critical organisations take cyber security more seriously and ensure their defences are up-to-date – both at an organisation and individual level. The National Cyber Security Centre (NCSC)[8] is a great resource for advice and guidance, especially for small to medium size organisations that typically do not have a dedicated team internally to manage their cyber security.

Do you think your organisation provides enough knowledge and skills to ensure its employees behave in a secure and compliant manner?

**2020/21**　　**2019/20**

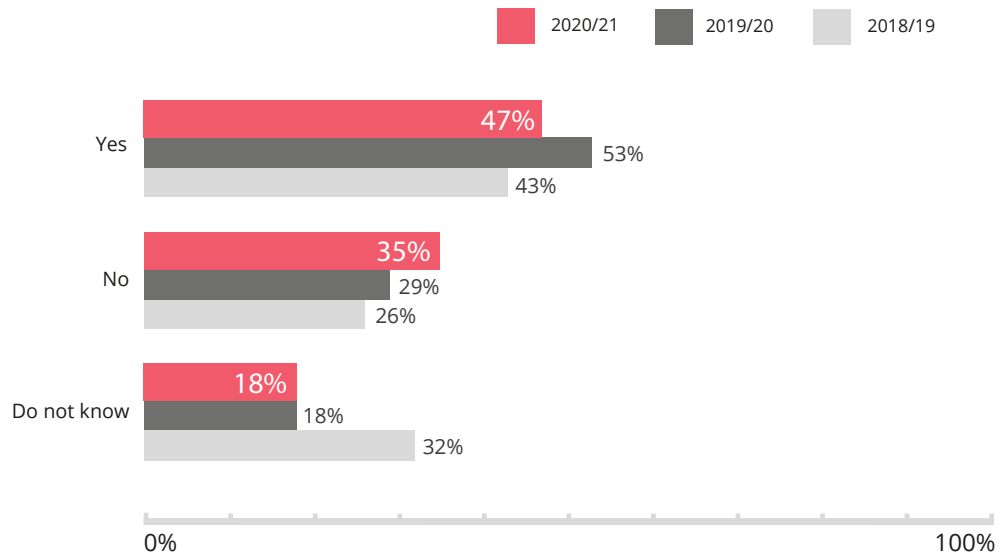| | |
|---|---|
| **Yes** | 78% (2020/21) / 77% (2019/20) |
| **No** | 15% (2020/21) / 17% (2019/20) |
| **Do not know** | 7% (2020/21) / 6% (2019/20) |

0%　　　　　　　　　　　　　　　　　　　　100%

The reality is that every business might be on the receiving end of a cyber-attack at some point. What's important is understanding that technology alone won't keep cyber criminals away.

Insider threats, for example, are a huge problem. All it takes is for an employee to fall for a phishing email or accidently share sensitive data – or perhaps a disgruntled employee to steal company data. The consequences could be damaging and even grind the affected organisation to a halt.

Again, our report shows attitudes to cyber security have remained stagnant, with 78% saying their organisation provides enough knowledge and skills to ensure its employees behave in a secure and compliant manner. This is only a 1% increase when compared to last year.

Given the growing risks of a cyber-attack, surely this should be higher? Cyber security must be a business priority and this means raising awareness of the risks across the whole workforce. Security needs to be part of each organisation's culture. Any cyber security strategy must start with educating people that a company's data is sensitive – and this education must not stop.

Do you feel new innovative technologies would put your organisation at greater risk of a cyber-attack?

**2020/21**    **2019/20**    **2018/19**

| | |
|---|---|
| **Yes** | 47% (2020/21) |
| | 53% (2019/20) |
| | 43% (2018/19) |
| **No** | 35% (2020/21) |
| | 29% (2019/20) |
| | 26% (2018/19) |
| **Do not know** | 18% (2020/21) |
| | 18% (2019/20) |
| | 32% (2018/19) |

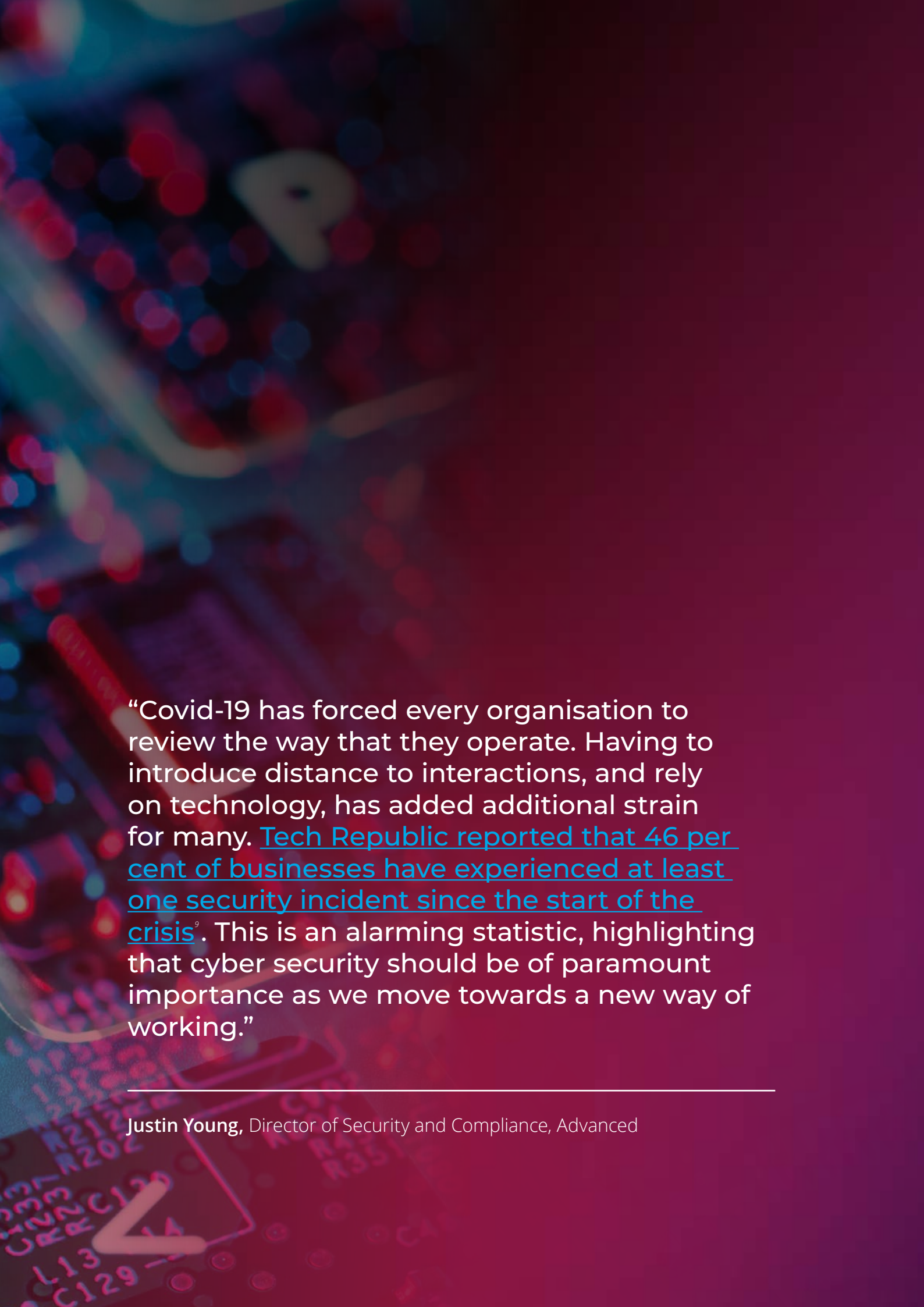0%                                                      100%

Interestingly, nearly half (47%) of our survey respondents still feel that innovative technologies would put their organisation at risk of a cyber-attack. It's a slight drop compared to last year, at 53%, and demonstrates that people are slowly beginning to recognise that new technology is usually more secure. As before, this comes down to education and helping people understand that innovative technologies can actually benefit an organisation's cyber security efforts.

After all, these technologies are typically built with security as a priority. Take the Cloud for example, leading providers such as Microsoft and Amazon Web Services (AWS) build their software with security in mind so there is less onus on businesses and more onus on software vendors. Of course, this doesn't negate the need for organisations to create a focus on cyber security among the workforce.

The bottom line is that cyber security must never be an afterthought and must be considered with every technology investment as organisations plan to digitally transform.
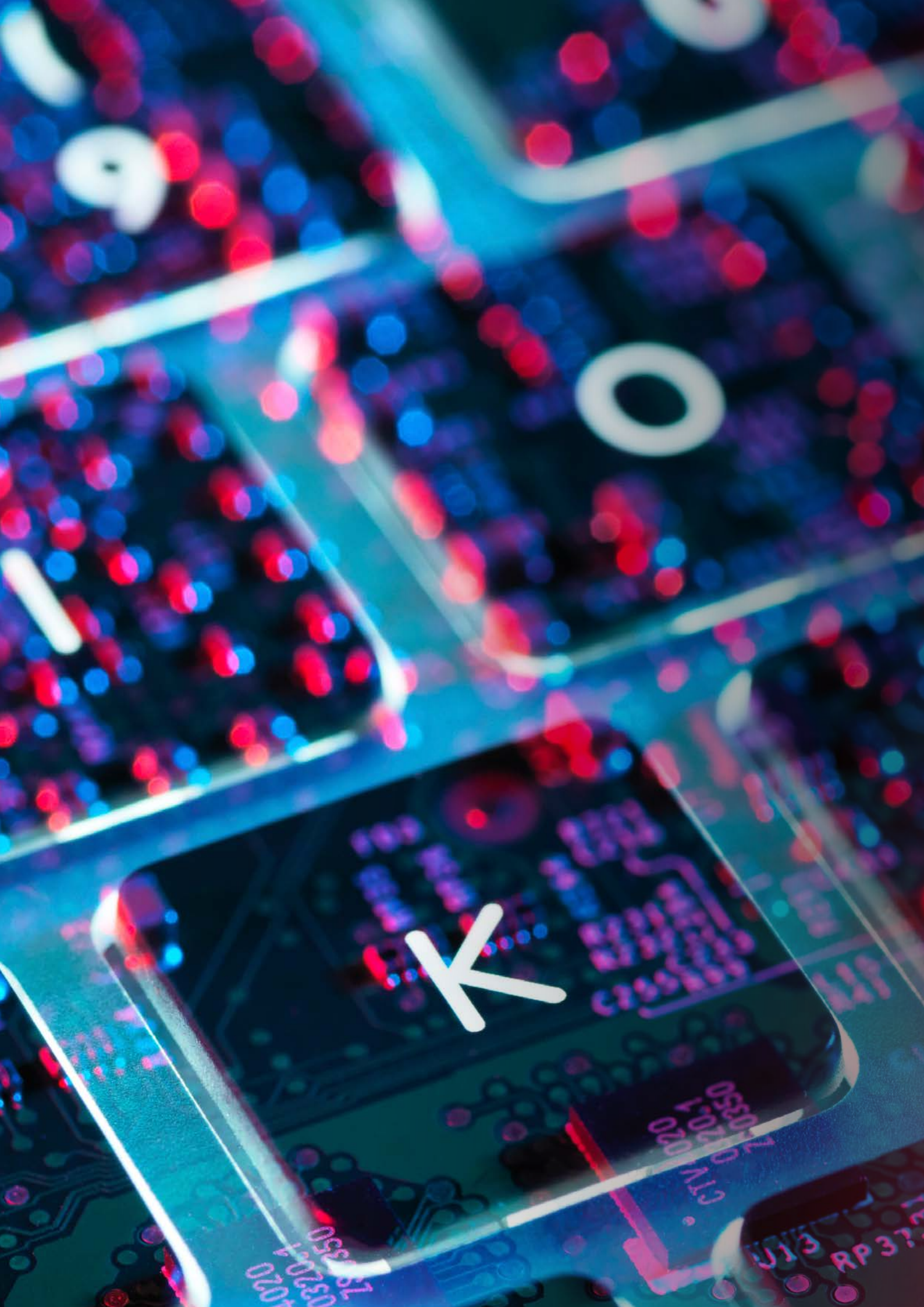
"Covid-19 has forced every organisation to review the way that they operate. Having to introduce distance to interactions, and rely on technology, has added additional strain for many. [Tech Republic reported that 46 per cent of businesses have experienced at least one security incident since the start of the crisis][9]. This is an alarming statistic, highlighting that cyber security should be of paramount importance as we move towards a new way of working."

**Justin Young,** Director of Security and Compliance, Advanced

# Conclusion

**The Advanced Trends Survey Report 2020/21 differs from our previous reports. It is dominated by a critical event that has turned our lives, and the business world, upside down.**

Some organisations have emerged stronger and more resilient, while others are still trying to navigate their way through the chaos. Sadly, as we have already seen, some will not survive.

Reassuringly, though, the majority of businesses share the same view which is that Covid-19 is fast-tracking the shift to a digital mindset. Again, some organisations and industries will be further ahead in the journey than others. For example, in the healthcare sector, many clinicians and patients are now able to communicate and interact virtually. According to the Royal College of GPs in the UK, around 70% of GP appointments have been carried out via video or telephone [10] since the introduction of lockdown in March 2020. In the property sector, 40% of estate agents are now offering online viewings to keep their sales pipeline going [11], according to Rightmove.

We still have a long way to go, but we have all witnessed the positive and empowering effects that technology can have on organisations, employees and communities.

Each year, we identify several critical questions organisations should consider and see as a blueprint for success. We are taking the same approach this year, but with Covid-19 in mind.

1. Have you assessed the full impact the pandemic has had on your business and your workforce, and which areas (such as HR and operations) have suffered the most?

2. Have you determined which technology systems have fallen short as a result of the pandemic, and which you can prioritise for modernising now?

3. Looking forward to business recovery, are you keeping up with the latest technology trends enough, and have you identified which digital tools could support your future success?

4. Have you performed a cost-benefit analysis for Cloud software to establish the benefits it can bring to your business, your workforce and your customers?

5. Have you been communicating with your employees enough to understand how they have been impacted by the pandemic, and how leaderships team can better support their wellbeing including through the use of technology?

6. To what extent is your leadership team making the right decisions around implementing tools that will increase productivity, accountability and collaboration for your workforce?

7. What measures do you need to put in place to ensure your entire workforce understands the increasing cyber security risks, and to enable your organisation to be more secure?

# Methodology

The Advanced Trends Survey Report 2020/21 was carried out online by Research Without Barriers (RWB) between 30 September and 6 October 2020. The sample comprised 1,007 senior decision makers working in organisations in the UK with over 100 employees.

# References

[1] Digital Business Report: https://www.oneadvanced.com/digitalbusinessreport/

[2] Public Cloud services market to grow by 6.3% in 2020: https://www.gartner.com/en/newsroom/press-releases/2020-07-23-gartner-forecasts-worldwide-public-cloud-revenue-to-grow-6point3-percent-in-2020

[3] Government introduced new video technology to support remote hearings in court: https://www.gov.uk/government/news/new-tech-will-help-keep-the-criminal-justice-system-moving-during-covid-19-pandemic

[4] Scale of the impact of the pandemic: https://www.mind.org.uk/news-campaigns/news/uk-government-must-urgently-plan-for-recovery-from-coronavirus-mental-health-crisis-says-mind/

[5] Avert a mental health crisis: https://www.who.int/news/item/14-05-2020-substantial-investment-needed-to-avert-mental-health-crisis

[6] Quarter are fast-tracking automation solely to stem the worker shortages arising from Covid-19: https://www.mckinsey.com/business-functions/operations/our-insights/industry-40-reimagining-manufacturing-operations-after-covid-19

[7] Increase in online scams and phishing, ransomware and misinformation: https://www.interpol.int/en/News-and-Events/News/2020/INTERPOL-report-shows-alarming-rate-of-cyberattacks-during-COVID-19

[8] National Cyber Security Centre (NCSC): https://www.ncsc.gov.uk/section/information-for/small-medium-sized-organisations

[9] 46 per cent of businesses have experienced at least one security incident: https://www.techrepublic.com/article/cybersecurity-half-of-businesses-have-had-remote-working-security-scares/

[10] 70% of GP appointments have been carried out via video or telephone: https://techmonitor.ai/vendor-intelligence/contracts/nhs-remote-consultations

[11] 40% of estate agents are now offering online viewings to keep their sales pipeline going: https://thenegotiator.co.uk/40-of-agents-now-offer-online-viewings-following-coronavirus-crisis/

# Demographics

## Position >5%

| | |
|---|---:|
| Administrative professional | **10%** |
| Business owner / CEO / Managing Director | **12%** |
| Finance professional | **11%** |
| Human Resources professional | **9%** |
| IT professional | **26%** |
| Sales professional | **8%** |
| Teacher | **6%** |
| Other | **13%** |

## Industry sector >5%

| | |
|---|---:|
| Commercial | **50%** |
| Education | **9%** |
| Health and Care | **8%** |
| Legal | **5%** |
| Professional Services | **21%** |
| Public Sector | **7%** |

## Gender

| | |
|---|---:|
| Male | **57%** |
| Female | **42%** |
| Other | **1%** |

## Age

| | |
|---|---:|
| 18 - 24 | **1%** |
| 25 - 34 | **27%** |
| 35 - 44 | **34%** |
| 45 - 54 | **24%** |
| 55+ | **14%** |

## Number of employees

| | |
|---|---:|
| 100-249 employees | **28%** |
| 250-1000 employees | **31%** |
| 1000+ employees | **41%** |

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# About Advanced

We are a dynamic British software and services business with over 20,000 global customers.

Providing mission-critical software that helps our customers accelerate and transform digitally.

Our Enterprise Resource Planning (ERP), Human Capital Management (HCM) and vertical market software solutions make a difference to millions of lives every day by making the complex simple, inspiring innovation and delivering exceptional customer service.

By using our solutions, organisations are able to adapt to the changing needs of their business, the markets they operate in and provide their people with the right tools to excel.

We work with organisations in all sectors, from Healthcare to Legal, and of all sizes – whether they want to move to the Cloud, invest in ERP, manage core business functions through one unified system or upgrade their legacy applications.

Our many customers include the NHS, Department for Work and Pensions (DWP), London City Airport and PRS for Music.

At Advanced, we have successfully expanded through organic and acquisitive growth. Our goal is to become the number one provider of software and services in the UK, aiming to double our revenue within the next four years.

Engaging, diverse and inclusive - continuing to invest in our people as they are at the heart of our success - we strive to be the employer of choice in our industry. Through our strong social conscience, we actively care for our communities and our planet.

**Previous Annual Trends Survey Reports:**

These can be viewed at: www.oneadvanced.com/trends-report

## More information

**w**  oneadvanced.com

**t**  +44(0) 330 343 8000

**e**  hello@oneadvanced.com

Ditton Park, Riding Court Road, Datchet, SL3 9LL