



Global Digital Employee Experience (DEX) Survey 2023

1,800 leaders share views on user expectations, hybrid work, IT and obstacles & strategies for DEX



Executive Summary

The last three years have brought significant changes to organizations across the globe. There's been a shift toward hybrid work environments, which has further fueled a dash to digital transformation in the cloud and elevated IT to the C-Suite.

Layered on top of the technology changes, baby boomers are retiring from the workforce, replaced by Millennial managers and Gen Z hires starting their careers. The rising influence of these 'digital natives,' shift to new work models, and evolving technology have had a profound impact on how companies monitor and improve the Digital Employee Experience (DEX).

To understand the impact of those changes, Riverbed conducted a global survey to investigate how companies are approaching and re-envisioning DEX now and into the future. The survey investigated generational motivations and expectations, and challenges and strategies to delivering an exceptional DEX. The survey found that the vast majority of organizations are planning to invest in DEX, including leveraging solutions such as AI and Unified Observability to help meet heightened user expectations.

The Riverbed Global Digital Employee Experience (DEX) survey, fielded by Sapio Research in May 2023, polled more than 1,800 IT decision-makers (ITDMs) and business decision-makers (BDMs) across 10 countries, all with over \$250 million in annual revenue. Their industries include finance/insurance, oil & gas, government/public sector, healthcare/pharmaceutical, manufacturing (including technology), retail, and professional services.



Key Findings

Our survey sought to identify the challenges organizations face in delivering an outstanding DEX and to uncover strategies to meet the evolving digital expectations of customers and employees. Here are the key findings.

Companies must meet the high digital expectations of younger workers.

Millennials and Gen Z have the highest expectations for technology at work, with **91%** of decision-makers believing they will need to provide more advanced digital experiences to meet their needs. Failure to meet their digital experience expectations can have negative consequences, including reputational damage, disruption to the company and employees leaving an organization. CIOs are becoming Chief Talent Officers too.

Five challenges hinder digital experience excellence.

Creating a great DEX is critical to employee retention, improving employee engagement, boosting employee productivity, and growing a business. Overall, **95%** of leaders say at least one major obstacle is impacting their ability to deliver an excellent digital experience. The top five obstacles identified: budget constraints, talent shortages, inadequate observability tools, the lack of appropriate cloud services and Software as a Service (SaaS) apps, and too much data – which leads to complexity.

IT's role is evolving, but talent is hard to come by.

81% of ITDMs and BDMs acknowledge the increasing relevance of IT within the C-suite and business, following the shift to hybrid

work models catalyzed by the COVID-19 pandemic. However, many organizations are struggling to find personnel with the right skills and talents. Many leaders are up-skilling existing IT teams to address this. Additionally, **86%** believe unified observability technology with greater automation can help bridge the skills gap.

Emerging and key existing technologies will make or break a business.

Artificial intelligence (AI), cloud, automation, digital experience management and application/network acceleration solutions are cited by at least a third of respondents as becoming increasingly business-critical in the next 18 months. Additionally, **92%** of leaders say unified observability is important for competitiveness and delivering a seamless DEX.

Organizations are investing in DEX and the hybrid workforce.

In the survey, **92%** of business and IT leaders say investing in DEX is among their top priorities for the next five years. Eighty-nine percent are accelerating digital experience adoption and implementation. Additionally, **88%** of respondents plan to invest in technology over the next 12-18 months to support the hybrid workforce.



DEX and Heightened Expectations of Next-Generation Workforce

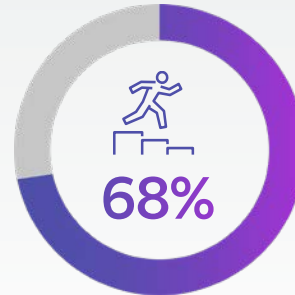
Delivering on the digital employee experience (DEX) can drive significant benefits to organizations – from greater employee engagement and improved productivity to increased competitiveness and better overall performance.

95% Of BDMs and ITDMs say delivering a seamless DEX is important, and 56% critically important, to their organization's ability to remain competitive.

The stakes for delivering on the DEX has never been higher as next-generation employees – Millennials and Generation Z – become a larger part of the workforce. As younger generations or 'digital natives' have grown up with technology deeply embedded in their daily lives, their expectations regarding digital experiences extend to the workplace. Leaders surveyed believe that failing to meet the digital experience demands of younger generations can be disruptive (**63%**), including potentially reputation destroying, and over **68%** believe employees would consider leaving the company. **CIOs are essentially becoming Chief Talent Officers too.**

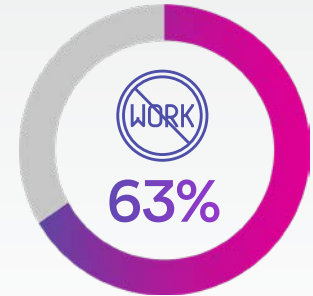
Failing to meet the digital experience needs of younger generation employees

Talent Drain



Believe they'd consider leaving the company

Disruptive



Say it will impact productivity, reputation and performance

Which Generation Expects the Most From Their Digital Experience?

Today, Millennials and Generation Z employees make up about half of the global workforce, which is expected to grow to approximately **70%** by 2030. Already, leaders say Millennials (**29%**) and Gen Z (**28%**) are most demanding of IT's time, over Generation X (**19%**) and Baby Boomers (**9%**). This trend will continue over the coming years.

As new generations enter the workforce, **91%** of decision makers believe they will need to provide more advanced digital experiences in the next five years, and **89%** say it will put increased pressure on IT resources.



However, catering to digital preferences should not be limited to younger generations alone. To ensure a cohesive work environment, workplaces must be equipped to meet the needs of all employees, as the vast majority expect digital services and applications to work flawlessly all the time.

The survey found that nearly half of leaders consider a seamless digital experience as the key factor in keeping their workforce engaged, surpassing traditional office perks such as weekly office happy hours or free coffee and snacks.

Top office perks to keep employees most engaged



49%

Seamless
digital experience



25%

Weekly office
happy hours



14%

Free coffee
and snacks



11%

Company
merchandise/giveaways

Hybrid Work Continues, Requiring IT to Support DEX Everywhere

Most organizations have shifted to hybrid work models, with survey respondents saying

96% Believe hybrid work enhances ability to attract/retain talent, and remain competitive

91% Believe hybrid work will have a lasting and positive impact on society and the world

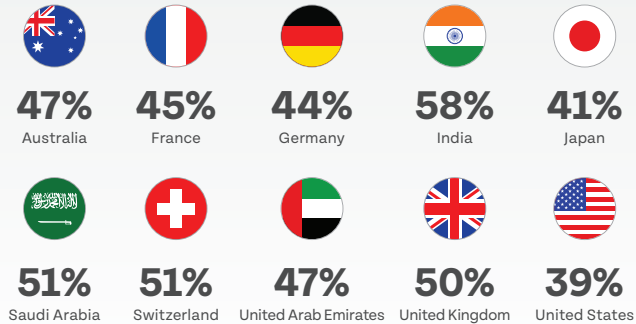
47% Of their employees work hybrid today

This underscores the significance of providing employees with smooth and user-friendly digital services and tools to enhance their overall experience and maintain high levels of engagement, regardless of work location. Fortunately, **88%** of those surveyed plan to invest in technology over the next 12-18 months to support hybrid work.



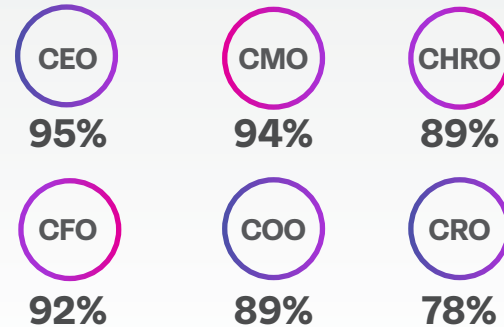
Hybrid work is a global phenomenon

On average, **47%** of today's global workforce is hybrid, according to business and IT leaders. However, the hybrid workforce varies by country. India leads with **58%** of leaders saying employees are working hybrid, while the United States lags behind at **39%**.



What does the C-suite really think about hybrid work?

Despite some news stories that indicate otherwise, our survey shows that CEOs give a thumbs up to the impact of hybrid work! The majority of C-suite executives agree a hybrid work model will have a lasting and positive impact on society and the world.



Delivering a Better Digital Experience Is Getting Harder, Not Easier

87%

Slow-running systems and apps, and outdated technology, are directly impacting growth and performance

86%

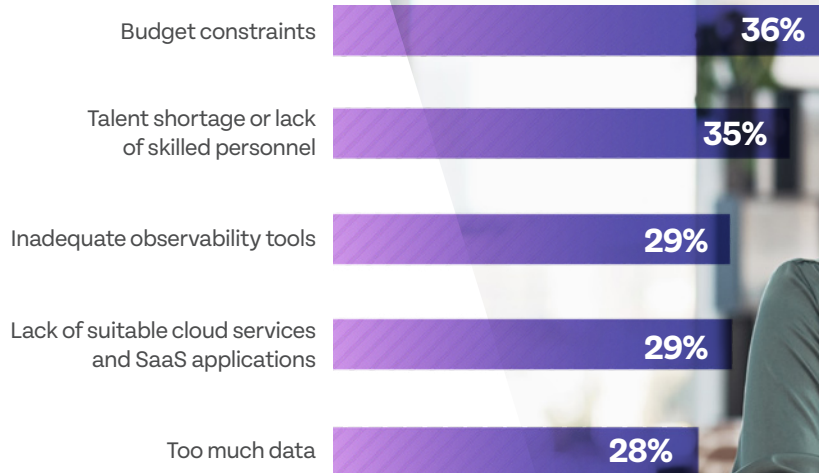
One of greatest risks to an organization's ability to grow and maintain talent and customers is lack of full visibility over DEX

The survey revealed that decision-makers responsible for addressing such problems and spearheading digital transformation frequently face roadblocks and challenges that make it difficult to deliver the desired digital experiences to their employees and customers.

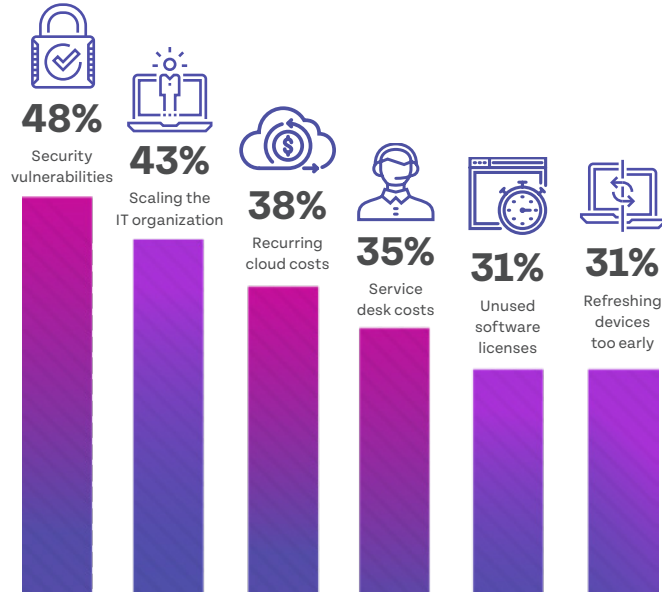


95% of Leaders Identified at Least One Major Obstacle Hindering Their Ability to Deliver an Excellent Digital Experience for End-Users

Top 5 Obstacles Cited



We also asked leaders what IT-related areas they are most concerned about given the economic climate. Security vulnerabilities **48%** and scaling the IT organization **43%** topped the list:



The unpredictable economic climate is forcing companies to take a hard look at budgets, and IT-related expenses are under scrutiny. Organizations are increasingly focused on optimizing their IT costs while maintaining operational efficiency. Today, there are Digital Experience Management (DEM) and Unified Observability solutions that organizations are leveraging to reduce unnecessary spend, without impacting the digital experience.

Saved \$10 Million through a Smart Device Refresh – leveraging DEM and Unified Observability

For example, a global top 5 financial institution was able to save \$10 Million through a Smart Device Refresh—leveraging DEM and Unified Observability to gain insights that allowed them to reduce devices needing replacement by 45% by looking at the device health versus age. This financial firm was also able to eliminate under-used software.

As IT Elevates to C-Suite, Gaps in IT Resources and Skills Pose a Challenge

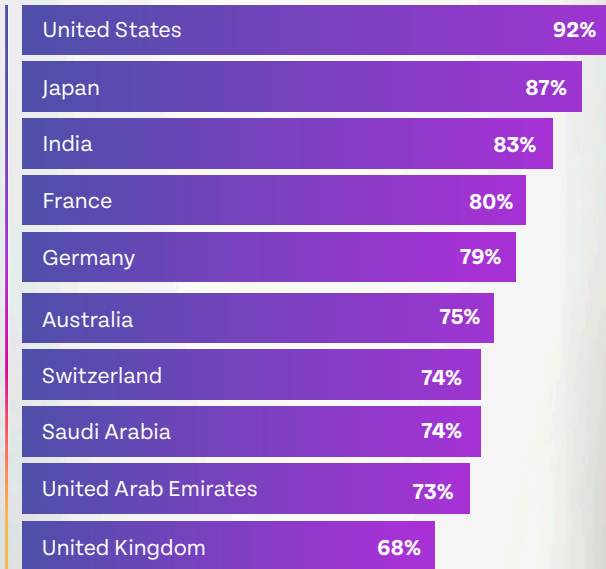
92% Agreed that IT is more responsible
for business innovation now than
it was three years ago

In the survey, **81%** of ITDMs and BDMs acknowledge the increasing relevance of IT within the C-suite and enterprise following the shift to hybrid work models catalyzed by the COVID-19 pandemic. IT departments have also gained increased recognition and influence within the executive leadership team.



80%

Of ITDMs said they currently have a seat at the C-suite table; here's how it varies by country:





**Top 3 things
to keep or gain a seat
at the C-suite table**

1 Collaborate with C-suite to bring the business strategy to fruition through technology

2 Illustrate how IT supports sustainability initiatives for the company

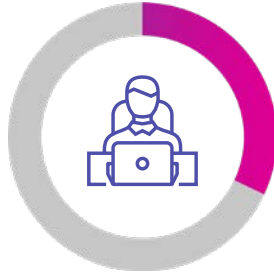
3 Play a critical role on the digital experience for end-users

At the same time that IT is becoming more relevant in the C-suite and Boardroom, IT leaders are currently grappling with a personnel and skills shortage.



41%

IT personnel lack
necessary skill-set



37%

Face a shortage
of IT personnel

A lack of available and appropriately skilled IT personnel poses a challenge in implementing digital experience initiatives. Skills gaps also force senior-level IT professionals to spend their time addressing tactical work, taking them away from strategic projects and decreasing their overall job satisfaction.



Among those facing skills shortages, **81%** have proactively allocated budget for retraining individuals. Additionally, **86%** of leaders say unified observability technology with greater automation can help bridge the skills gap.

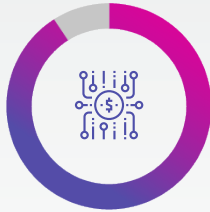


86%

Unified observability technology with greater
automation can help bridge the skills gap

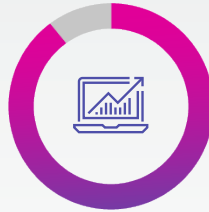
An area of encouragement is that business and IT leaders plan to invest in DEX and technologies to support it.

DEX is paramount to organizations and decision makers plan to invest



92%

Investing in DEX is among their top priorities for the next five years



89%

Accelerating digital experience adoption and implementation

Leaders view unified observability as key component to deliver a superior DEX



94%

Unified observability is important (52% critically) to deliver DEX and for competitiveness



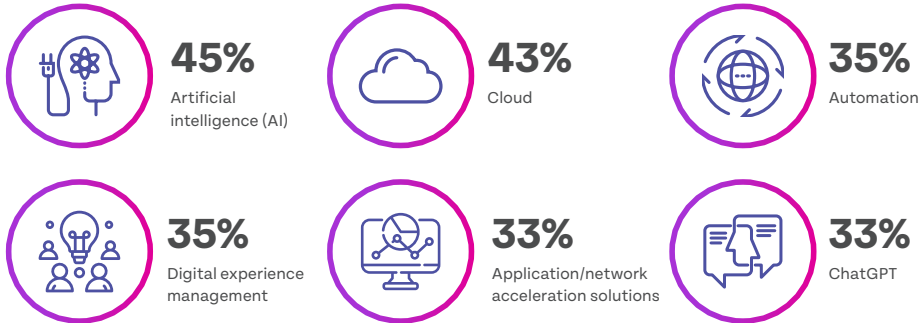
91%

Say there must be greater investment in unified observability for DEX

Unified observability enables organizations to effectively monitor and analyze their entire digital infrastructure, including networks, apps, and user experiences. This holistic view allows them to proactively identify and address issues or bottlenecks that may impact performance, productivity, and employee or customer satisfaction. With real-time insights into their digital ecosystem, organizations can make informed decisions, optimize operations, and deliver a seamless digital experience for both employees and customers.

New and familiar technologies shape the future workplace

Considering the current economic climate, these technologies are cited by at least a third of respondents as becoming business-critical for their organizations in the next 18 months. These technologies are expected to play a critical role in enhancing business operations, productivity, and overall digital experiences.



In India, AI is considered even more important at **54%**, while France and Australia see AI as less important than other countries at **37%**.

Conclusion

By prioritizing investments in DEX and solutions such as unified observability and AI, and by empowering IT teams to enhance the digital workplace, organizations can attract and retain top talent, outperform competitors, and achieve sustainable growth. Aligning IT initiatives with the goal of delivering exceptional digital experiences creates a positive feedback loop, leading to higher employee engagement, customer satisfaction, and overall business success.

Overcome Challenges with Alluvio Unified Observability and Riverbed Acceleration

Alluvio Unified Observability

Riverbed's [Alluvio Unified Observability](#) portfolio enables organizations to unify data, actions and insights across the entire digital ecosystem. By leveraging Riverbed's advanced capabilities, companies can optimize their digital experiences, enhance operational efficiency, and drive performance and business growth.

The Alluvio Unified Observability portfolio includes:

- [Alluvio IQ](#) – a SaaS-delivered unified observability service that leverages AI and automation to surface impactful issues with context to solve problems fast.
- Industry-leading visibility tools for [Network Performance Management \(NPM\)](#) and [Digital Experience Management \(DEM\)](#), which encompasses [Application Performance Management \(APM\)](#) and [End User Experience Monitoring \(EUEM\)](#).

Alluvio Unified Observability solves challenges related to:

- **Digital Employee Experience:** Monitors and analyzes digital employee experiences and productivity to identify and address any performance bottlenecks, ensuring a smooth and productive digital workplace environment.
- **Budget Constraints:** consolidates capabilities, eliminating the need for multiple point products while providing improved automation and actionable insights to reduce service desk tickets. Additionally, Alluvio DEM solutions provide visibility into end-user devices, helping reduce spend on unused software licenses and unnecessary device refreshes.
- **Talent and Skill Shortages:** leverages user-friendly automated workflows and runbooks, enabling organizations to 'shift left' – allowing the full IT staff to solve problems faster and enabling more experienced staff to focus on strategic initiatives.



Riverbed Acceleration

Riverbed Acceleration solutions empower users to harness the full potential of enterprise applications and services, regardless of their location – be it mobile, remote, or on-premises. The Riverbed Acceleration portfolio is specifically designed to address common network performance challenges such as latency and congestion. With Riverbed Acceleration, users experience peak speed and seamless performance, enabling them to maximize their productivity and enjoy more delightful digital experiences.

Products in the Acceleration portfolio include:

- **Riverbed® SteelHead:** The world's #1 WAN optimization solution offers industry-leading secure optimization of all applications across networks for **99%** data reduction and **33x** faster application performance.
- **Riverbed Cloud Accelerator:** Optimizes and accelerates cloud-based applications, enhancing performance and user experience.
- **Riverbed Client Accelerator:** Extends best-in-class WAN optimization and app acceleration technology to remote users for fast and secure access to on-prem, IaaS, and SaaS-based apps across any network.



Learn more about the **Digital Employee Experience** and make every employee experience a compelling one.

riverbed.com/solutions/employee-experience



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Riverbed – Empower the Experience

Riverbed is the only company with the collective richness of telemetry from network to app to end user that illuminates and then accelerates every interaction so that users get the flawless digital experience they expect across the entire digital ecosystem. Riverbed offers two industry-leading solution areas – Alluvio by Riverbed, an innovative and differentiated Unified Observability portfolio that unifies data, insights, and actions across IT, so customers can deliver seamless digital experiences; and Riverbed Acceleration, providing fast, agile, secure acceleration of any app over any network to users, whether mobile, remote, or on-prem. Together with our thousands of partners, and market-leading customers across the world, we empower every click, every digital experience. Learn more at riverbed.com.