RESEARCH

Fellowmind People & Technology

Report 2022

Fellowmind

How do companies deal with the challenges of digitalization, collaboration, and communication?

We asked over 3000 IT and business decision-makers in six European countries. Check out the results in the Fellowmind People & Technology Report 2022, which offers an insight into how companies are preparing for the future and leveraging technology to empower employees and become future-proof.

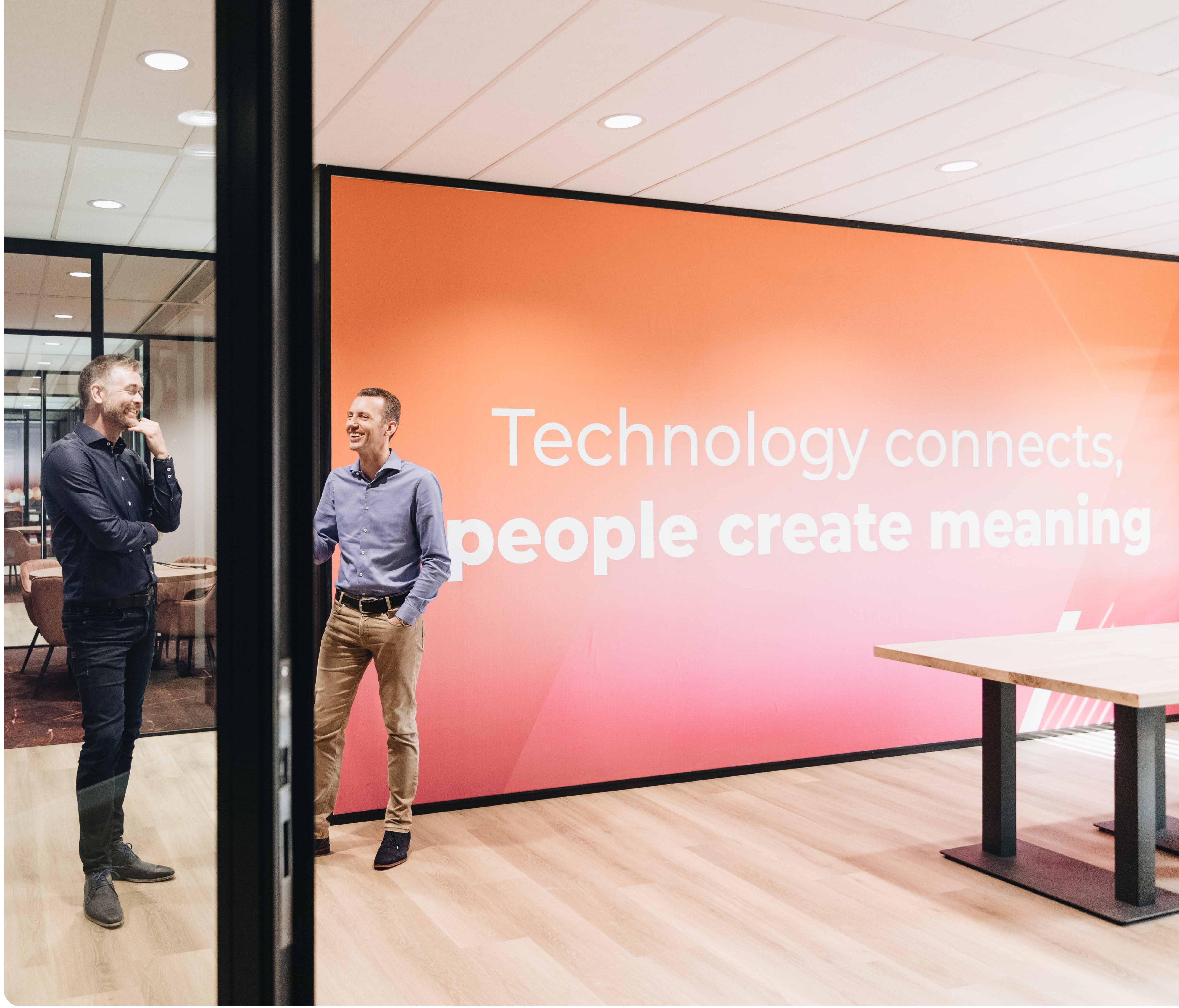
Table of contents

About the study

The relationship between technology and people has changed massively. Companies in manufacturing, logistics, and agriculture are speeding up their automation, AI, and robotics investments to mitigate risks and stimulate innovation and efficiency. Besides, from finance to retail and utilities to government, we see heavy investments in cloud solutions to securely facilitate their workforces and optimize customer experiences.

Technology does not change everything for the better, though. Many organizations struggled to keep up with the required pace of digital transformation, and employees needed to get used to the ‘new normal’, dealing with technical challenges and new ways of collaborating and communicating.

This study was instigated to provide insight into how organizations in Europe look at this digital transformation. It was conducted by Dutch research agency Markteffect among 3,058 IT and business decision-makers in the Netherlands (530), Germany (505), Sweden (502), Poland (500), Finland (511) and Denmark (510). The respondents come from various industries, such as manufacturing, automotive, finance, retail, and agriculture. The fieldwork was conducted between 23/08/2021 and 13/09/2021.



Research Sample

n=3.058

Respondents

- IT and Business decision makers
- The Netherlands, Finland, Denmark, Sweden, Germany, Poland
- Aim: n=500 per country

Fieldwork

The fieldwork was conducted between 23/08/2021 and 13/09/2021

Country

	%	n
Netherlands	17%	530
Germany	17%	505
Sweden	16%	502
Poland	16%	500
Finland	17%	511
Denmark	17%	510
NET	100%	3058
Column n	3058	

Total sample; Unweighted; base n = 3058

What is your gender?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Male	71%	73%	66%	60%	75%	71%	69%
Female	29%	27%	34%	40%	25%	29%	31%
Other	0%	0%	0%	0%	0%	0%	0%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

How many employees are working in your organization?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
2 to 50	17%	16%	20%	26%	9%	5%	15%
51 to 250	35%	24%	25%	30%	11%	12%	23%
251 to 500	20%	17%	17%	19%	36%	31%	23%
501 to 1000	11%	20%	19%	11%	36%	40%	23%
1001 or more	18%	23%	19%	14%	9%	12%	16%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

What industry are you working in?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Manufacturing	10%	10%	14%	18%	5%	7%	11%
Construction	5%	8%	7%	8%	5%	7%	7%
Wholesale & distribution	9%	8%	7%	8%	3%	6%	7%
Utilities	2%	3%	1%	3%	1%	2%	2%
Finance	11%	14%	12%	11%	42%	42%	22%
Professional Services	20%	15%	13%	15%	12%	12%	15%
Chemistry & plastics	2%	4%	1%	1%	1%	2%	2%
Real Estate	2%	3%	4%	4%	2%	2%	3%
Agriculture	2%	1%	2%	2%	1%	1%	1%
Automotive	1%	4%	3%	3%	1%	4%	3%
Energy	2%	4%	5%	2%	4%	5%	4%
Retail	7%	11%	11%	8%	16%	2%	9%
Health	11%	6%	8%	3%	3%	4%	6%
Other, namely:	16%	11%	11%	12%	5%	4%	10%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

In which department in the organization do you work?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Management	24%	24%	25%	29%	13%	9%	21%
IT & development	33%	38%	29%	18%	20%	33%	28%
Operations	17%	8%	17%	20%	12%	5%	13%
Finance	17%	16%	14%	14%	43%	40%	24%
Sales & Marketing	10%	14%	15%	19%	12%	14%	14%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

Age

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
18 to 34	22%	33%	39%	42%	20%	25%	30%
35 to 54	57%	55%	51%	52%	76%	71%	60%
55 or older	21%	13%	10%	6%	5%	3%	10%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	504	502	500	511	510	3057

Total sample; Unweighted; base n = 3058

Results per country

Did you respond to the COVID-19 situation by investing in new productivity and collaboration solution?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Yes, we invested in cloud solutions (e.g. cloud storage, file sharing)	39%	49%	33%	46%	50%	58%	46%
Yes, we invested in online collaboration tools (e.g. Microsoft Teams, Slack)	48%	58%	42%	46%	45%	54%	49%
Yes, we invested in security solutions (e.g. a VPN or anti-malware solution)	39%	47%	30%	37%	47%	54%	42%
Yes, we invested in data analytics (e.g. Power BI, Tableau)	18%	29%	26%	19%	42%	54%	31%
Yes, we invested in other solutions	1%	0%	2%	1%	0%	0%	1%
No, we were fully equipped already to support remote working	16%	10%	19%	12%	9%	6%	12%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

Which tools/solutions do employees in your organization use?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Online collaboration platforms / tools	45%	48%	41%	46%	37%	41%	43%
Data analytics	41%	42%	39%	43%	31%	37%	39%
CRM solutions	39%	46%	39%	28%	42%	37%	38%
Project management tools	39%	44%	36%	31%	34%	38%	37%
ERP solutions	30%	38%	25%	25%	38%	35%	32%
Business intelligence	28%	30%	30%	19%	34%	35%	29%
Marketing automation tools	21%	29%	25%	27%	32%	35%	28%
Field service software	19%	21%	23%	26%	29%	43%	27%
Other	1%	1%	1%	1%	0%	0%	1%
None of the above	6%	4%	5%	6%	2%	2%	4%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

What tools do you think your organization will invest in over the next 3-5 years?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Customer Relationship Management (CRM) solutions	25%	40%	33%	41%	39%	44%	37%
Data analytics	33%	39%	33%	38%	31%	30%	34%
Online collaboration platforms and tools	28%	35%	25%	34%	32%	37%	32%
Enterprise Resource Planning (ERP) solutions	21%	32%	23%	32%	36%	34%	29%
Business intelligence	27%	35%	31%	23%	26%	34%	29%
Project management tools	27%	29%	27%	31%	27%	32%	29%
Marketing automation tools	19%	26%	21%	30%	28%	34%	26%
Field service solutions	15%	19%	20%	26%	30%	32%	24%
Other	1%	0%	1%	1%	0%	0%	1%
None of the above	12%	7%	11%	5%	4%	3%	7%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

In your view, what are the most common challenges employees in your organization face when it comes to productivity and communications solutions?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Not sure how to work with new tools/solutions	27%	43%	31%	19%	43%	44%	35%
The available tools are too difficult to use	27%	32%	23%	28%	37%	46%	32%
Too many tools to work with	27%	26%	35%	25%	37%	37%	31%
Not willing to work with new tools/solutions	25%	31%	24%	35%	37%	34%	31%
No remote access to documents/information	18%	22%	17%	32%	22%	36%	24%
Other	3%	1%	1%	1%	0%	0%	1%
None of the above	18%	10%	10%	13%	7%	5%	10%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058
Total sample; Unweighted; base n = 3058							

Total sample; Unweighted; base n = 3058

Which needs do employees have when it comes to internal and external solutions?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Being able to work more closely with remote colleagues	36%	47%	34%	36%	41%	39%	39%
Being able to work better with customers remotely	31%	40%	30%	43%	41%	45%	38%
More insight in internal processes and working methods	34%	35%	34%	27%	40%	50%	37%
More insight in customer behavior and needs	29%	33%	28%	29%	40%	44%	34%
Optimize our overall planning	27%	37%	29%	31%	34%	39%	33%
Other	0%	0%	0%	0%	0%	0%	0%
None of the above	8%	3%	8%	5%	3%	1%	5%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

In your view, who should be responsible for training/instruction on new solutions and tools?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Internal IT department	35%	43%	39%	34%	28%	37%	36%
Solution vendor	23%	24%	16%	33%	23%	24%	24%
Business / key users	24%	16%	27%	12%	30%	19%	21%
Implementation partner	16%	17%	17%	21%	19%	19%	18%
Other	2%	1%	1%	1%	0%	0%	1%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

How are employees in your organization supported in adopting (new) digital tools and changing the way they work?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Online training or e-learning	44%	46%	37%	44%	35%	39%	41%
Active internal communication to increase awareness as well as influence attitudes and behaviors	34%	43%	31%	35%	48%	45%	39%
Personal training (not digital)	35%	37%	28%	39%	34%	33%	34%
Actively involving team leads to promote change in their teams	25%	40%	25%	28%	37%	39%	32%
Digital manuals or ebooks	30%	27%	26%	24%	28%	31%	28%
Instruction videos	26%	30%	29%	28%	22%	27%	27%
Using influential internal sponsors to promote change on the company level	20%	21%	20%	20%	32%	36%	25%
Other	1%	0%	1%	0%	0%	0%	0%
We don't provide any training or support	6%	3%	4%	4%	2%	1%	3%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

Customer Relationship Management (CRM) tools play a major role in improving customer satisfaction. What impact has the use of CRM solutions had on your organization?

	(strongly) reduced							Not reduced or increased							(strongly) increased							Not applicable							NET						
	Country																																		
	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Quality of contact with client	10%	14%	22%	16%	16%	5%	14%	36%	28%	26%	22%	19%	20%	25%	48%	55%	45%	60%	63%	74%	57%	6%	4%	6%	2%	2%	2%	4%	100%	100%	100%	100%	100%	100%	100%
Personalized contact with client	15%	21%	23%	18%	14%	9%	17%	41%	32%	28%	27%	24%	20%	29%	38%	43%	44%	53%	59%	69%	51%	6%	4%	5%	2%	2%	2%	3%	100%	100%	100%	100%	100%	100%	100%
Frequency of contact with client	10%	17%	20%	20%	16%	8%	15%	43%	37%	30%	23%	21%	23%	30%	40%	42%	44%	55%	61%	67%	52%	6%	3%	6%	2%	2%	2%	4%	100%	100%	100%	100%	100%	100%	100%

Total sample; Unweighted; base n = 3058

What impact did the pandemic have on the way you communicated with your customers during the past year?

	(strongly) reduced							Not reduced or increased							(strongly) increased							Not applicable							NET						
	Country																																		
	Nether-lands	Ger-many	Swe-den	Poland	Fin-land	Den-mark	NET	Neth-er-lands	Ger-many	Swe-den	Poland	Fin-land	Den-mark	NET	Neth-er-lands	Ger-many	Swe-den	Poland	Fin-land	Den-mark	NET	Neth-er-lands	Ger-many	Swe-den	Poland	Fin-land	Den-mark	NET	Neth-er-lands	Ger-many	Swe-den	Poland	Fin-land	Den-mark	NET
Frequency of contact with client	20%	26%	25%	22%	19%	12%	21%	41%	32%	33%	27%	22%	20%	29%	37%	41%	39%	50%	58%	68%	49%	2%	2%	3%	1%	0%	0%	1%	100%	100%	100%	100%	100%	100%	100%
Quality of contact with client	16%	20%	26%	23%	17%	12%	19%	44%	37%	34%	28%	25%	21%	32%	37%	41%	38%	47%	58%	67%	48%	2%	2%	3%	2%	0%	1%	2%	100%	100%	100%	100%	100%	100%	100%
Personalized contact with client	28%	29%	33%	22%	20%	12%	24%	38%	35%	28%	27%	23%	20%	29%	32%	34%	35%	49%	57%	68%	46%	3%	2%	3%	2%	1%	0%	2%	100%	100%	100%	100%	100%	100%	100%

Total sample; Unweighted; base n = 3058

How does your organization currently connect, interact and meet with customers?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Email	65%	69%	54%	56%	42%	41%	55%
Phone	64%	59%	48%	55%	36%	35%	49%
Video conferencing	36%	49%	43%	39%	38%	35%	40%
Face-to-face meetings	41%	43%	40%	44%	32%	38%	40%
Through a customer portal	27%	35%	25%	26%	27%	31%	28%
WhatsApp or similar chat application	29%	26%	20%	28%	35%	31%	28%
Through mobile apps designed to customers	19%	22%	19%	26%	36%	34%	26%
During events and fairs	14%	18%	20%	21%	22%	30%	21%
Other	1%	0%	0%	0%	1%	0%	0%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

Which of the communication channels do you think are used most to reach customers?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Phone	39%	38%	32%	39%	25%	27%	33%
Email	36%	41%	37%	36%	23%	24%	32%
Video conferencing	14%	19%	20%	14%	17%	13%	16%
Through mobile apps designed to customers	9%	12%	9%	16%	25%	21%	16%
Through a customer portal	12%	16%	15%	14%	16%	20%	16%
Face-to-face meetings	13%	11%	13%	18%	9%	15%	13%
During events and fairs	6%	8%	11%	11%	17%	22%	13%
WhatsApp or similar chat application	6%	6%	7%	6%	7%	10%	7%
Other	0%	0%	0%	0%	0%	0%	0%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	417	418	349	367	433	441	2425

Total sample; Unweighted; base n = 2425; total n = 3058; 633 missing

Which of the communication channels do you think are the most efficient to reach customers?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Phone	37%	33%	29%	31%	22%	24%	29%
Email	26%	33%	25%	28%	22%	20%	26%
Face-to-face meetings	23%	21%	22%	30%	14%	17%	21%
Video conferencing	15%	23%	23%	18%	18%	15%	18%
Through mobile apps designed to customers	10%	13%	9%	18%	27%	23%	17%
Through a customer portal	12%	17%	18%	11%	18%	20%	16%
During events and fairs	5%	8%	13%	9%	16%	20%	12%
WhatsApp or similar chat application	7%	7%	7%	8%	9%	10%	8%
Other	0%	0%	0%	0%	0%	0%	0%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	417	418	349	367	433	441	2425

Total sample; Unweighted; base n = 2425; total n = 3058; 633 missing

What tools/solutions have you invested the most in over the past year to improve customer relationships?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Video conferencing solutions	30%	43%	34%	34%	36%	39%	36%
Employee training tools / solutions	27%	30%	28%	38%	39%	45%	35%
CRM / customer engagement tools	24%	36%	28%	30%	39%	40%	33%
Customer service tools (like Chatbots)	20%	26%	23%	27%	32%	36%	27%
Marketing automation tools	18%	24%	23%	21%	30%	40%	26%
(Social) listening / monitoring tools	14%	19%	17%	25%	24%	32%	22%
Other	2%	0%	1%	0%	0%	0%	1%
We didn't invest in any solutions/tools	20%	9%	11%	10%	6%	5%	10%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

Is Artificial Intelligence (AI) being utilized in your organization to improve client communications and/or services?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Yes	22%	35%	38%	31%	76%	73%	46%
No, but planning to	29%	38%	29%	38%	10%	14%	26%
No	40%	24%	26%	27%	13%	11%	24%
I don't know	9%	3%	7%	4%	1%	2%	5%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

In what time frame do you think you will be deploying AI to improve client communications and/or services?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Within 6 months	6%	8%	11%	15%	25%	19%	12%
Within one year	35%	49%	46%	38%	39%	45%	42%
Within two years	46%	34%	31%	39%	27%	32%	36%
Within three to five years	13%	7%	10%	8%	6%	4%	9%
Within more than five years	1%	1%	3%	1%	2%	0%	1%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	155	190	147	192	51	69	804

Total sample; Unweighted; base n = 804; total n = 3058; 2254 missing

What is the main reason to utilize AI for client communications and/or services?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
To provide 24/7 support to our customers	39%	39%	31%	42%	31%	36%	36%
To make our communication with customers more effective (e.g. chat bots)	32%	38%	27%	32%	36%	36%	34%
To resolve customer service issues before they arise	28%	30%	28%	32%	32%	36%	31%
To provide customers with more self-service options	25%	32%	29%	32%	30%	36%	31%
To collect more detailed client-data	30%	26%	29%	29%	32%	32%	30%
To provide employees with up-to-date client feedback	25%	25%	25%	28%	33%	38%	30%
To reduce costs	31%	35%	26%	34%	22%	29%	29%
To increase the scalability of our customer service	24%	25%	26%	28%	35%	33%	29%
Other	1%	0%	0%	0%	0%	0%	0%
I don't know	2%	1%	1%	0%	0%	0%	1%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	271	367	337	345	437	443	2200

Total sample; Unweighted; base n = 2200; total n = 3058; 858 missing

What is the main reason not to utilize AI?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
We don't see the added value of AI	31%	43%	30%	30%	53%	33%	35%
High costs of investment	19%	26%	20%	35%	16%	18%	23%
We feel the market is not mature enough and will wait with investing	13%	16%	15%	16%	9%	23%	15%
Lack of internal expertise / talent	14%	15%	13%	14%	18%	9%	14%
We are not aware of the possibilities regarding AI and our field of business	16%	18%	12%	7%	16%	12%	14%
Lack of time	8%	7%	8%	9%	6%	12%	8%
Other priorities regarding improving of client communications	14%	20%	16%	19%	7%	19%	16%
Other	5%	2%	1%	0%	0%	2%	2%
I don't know	12%	5%	18%	9%	9%	16%	11%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	210	122	129	134	68	57	720

Total sample; Unweighted; base n = 720; total n = 3058; 2338 missing

Has the pandemic accelerated your digital transformation as organization?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Yes, very much	22%	39%	42%	35%	73%	73%	47%
Yes, partially	47%	46%	45%	51%	20%	18%	38%
No	31%	15%	12%	14%	7%	9%	15%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

What are the three main challenges your organization faces when it comes to digital transformation?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Lack of dedicated IT skills in the organization	27%	27%	23%	25%	33%	29%	27%
Resistance for change in the organization among employees	19%	24%	20%	30%	30%	32%	26%
Inefficient business processes, like workflows among departments	25%	22%	22%	19%	25%	25%	23%
No defined strategy on this topic	21%	23%	21%	22%	24%	25%	23%
Lack of budget for this transformation	19%	23%	20%	25%	21%	26%	22%
Lack of knowledge of customer needs	18%	20%	18%	17%	22%	27%	21%
Lack of knowledge of employee needs	13%	21%	18%	16%	22%	25%	19%
Resistance for change in the organization among management	14%	14%	16%	21%	19%	29%	19%
Lack of time to make a start	15%	14%	23%	17%	23%	20%	19%
Other	3%	2%	1%	1%	1%	1%	1%
I don't know	13%	5%	8%	7%	4%	3%	7%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

How is your organization driving innovation and digital transformation?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
By training and inspiring employees internally	41%	41%	33%	40%	38%	32%	38%
By investing in digital tooling	33%	28%	33%	37%	31%	34%	33%
By hiring experienced tech-savvy's on senior level	18%	30%	24%	30%	39%	49%	31%
By hiring digital natives (versed in IT and technology)	19%	34%	24%	24%	43%	41%	31%
By setting up incubators / internal innovation platforms / groups	17%	19%	22%	17%	29%	34%	23%
By investing in external business consultancy	19%	25%	19%	20%	23%	29%	22%
Other	1%	0%	1%	0%	0%	0%	0%
None of the above	16%	7%	9%	10%	5%	3%	8%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

What do you see as key in ensuring your organization's competitive advantage in the future?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Investing in employee education	29%	26%	21%	25%	21%	16%	23%
Investing in product or service innovation	12%	23%	15%	24%	20%	26%	20%
Investing in customer experiences	14%	15%	19%	12%	24%	21%	18%
Investing in employee experience	15%	13%	20%	19%	19%	18%	17%
Investing in process optimization	20%	19%	18%	15%	14%	17%	17%
Other	1%	0%	0%	0%	0%	0%	0%
I don't know	10%	4%	7%	5%	2%	2%	5%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 804; total n = 3058; 2254 missing

Robots have been used in manufacturing for decades, but are now increasingly being used in other industries as well. Are robots being utilized within your organization and its processes?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Yes	22%	33%	33%	24%	73%	71%	43%
No	49%	40%	30%	38%	15%	12%	31%
No, but planning to invest in this	22%	24%	28%	33%	10%	15%	22%
I don't know	8%	4%	8%	6%	1%	2%	5%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 2200; total n = 3058; 858 missing

Where did you invest in?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Robotics for delicate tasks, for more precise work	30%	38%	28%	36%	53%	46%	42%
Robotics for dull tasks, that are repetitive and tedious	52%	36%	40%	39%	35%	45%	41%
Robotics for costly tasks, for saving money and time	38%	33%	32%	41%	34%	42%	37%
Robotics for dangerous tasks, that are not safe for humans	32%	35%	29%	28%	36%	40%	35%
Robotics for dirty tasks, that are unclear for humans	22%	26%	26%	28%	35%	39%	32%
Other	4%	1%	1%	1%	0%	1%	1%
None of the above	4%	2%	1%	0%	2%	3%	2%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	114	165	167	120	375	361	1302

Total sample; Unweighted; base n = 1302; total n = 3058; 1756 missing

Where are you planning to invest in?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Robotics for dull tasks, that are repetitive and tedious	17%	13%	15%	18%	3%	5%	11%
Robotics for delicate tasks, for more precise work	13%	14%	12%	17%	4%	6%	10%
Robotics for costly tasks, for saving money and time	11%	11%	13%	20%	4%	4%	10%
Robotics for dangerous tasks, that are not safe for humans	13%	10%	9%	15%	4%	6%	9%
Robotics for dirty tasks, that are unclear for humans	5%	9%	10%	14%	2%	4%	7%
Other	0%	0%	0%	0%	0%	0%	0%
None of the above	5%	4%	2%	3%	0%	1%	2%
NET	50%	42%	46%	58%	12%	17%	34%
Column n	229	285	310	284	426	436	1970

Total sample; Unweighted; base n = 1970; total n = 3058; 1088 missing

What is the main reason robotics are not part of your processes?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
We don't see the added value of robotics	37%	48%	44%	31%	53%	40%	41%
High costs of investment	18%	15%	10%	36%	9%	13%	19%
We are not aware of the possibilities regarding robotics and our field of business	13%	14%	14%	16%	17%	22%	15%
We will invest if the market is more matured	9%	13%	8%	11%	10%	13%	10%
Lack of time to invest	5%	3%	6%	6%	4%	14%	5%
Other priorities	14%	19%	18%	15%	12%	21%	16%
Other	9%	7%	3%	3%	5%	2%	6%
I don't know	13%	5%	8%	5%	5%	3%	7%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	261	200	153	188	78	63	943

Total sample; Unweighted; base n = 943; total n = 3058; 2115 missing

More and more industries are paying attention to securing knowledge. Do you already use videos or webinars within your organization to safeguard knowledge around processes and working methods, and to transfer knowledge to, for instance, new employees?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Yes	37%	43%	47%	37%	80%	72%	53%
No, but planning to invest in this	20%	25%	23%	29%	8%	15%	20%
No	34%	27%	20%	23%	9%	11%	21%
I don't know	9%	4%	10%	10%	2%	2%	6%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

In your view, what is driving the agenda for innovation in your market?

	Netherlands	Germany	Sweden	Poland	Finland	Denmark	NET
Changes in customer behavior	31%	29%	27%	23%	31%	33%	29%
Cybersecurity	24%	33%	21%	27%	32%	31%	28%
Corona / COVID-19	23%	33%	27%	22%	25%	30%	27%
Sustainability	32%	30%	21%	27%	20%	28%	26%
5G	14%	22%	22%	25%	29%	36%	25%
Law & Regulations	30%	29%	19%	21%	20%	26%	24%
Artificial Intelligence (AI) and machine learning	16%	26%	16%	20%	31%	32%	23%
Internet of Things (IoT)	18%	23%	21%	17%	27%	31%	23%
Virtual and augmented reality	9%	15%	14%	19%	28%	26%	18%
Blockchain	8%	16%	11%	12%	20%	25%	15%
Other	0%	0%	1%	0%	0%	0%	0%
I don't know	10%	4%	8%	8%	4%	2%	6%
NET	100%	100%	100%	100%	100%	100%	100%
Column n	530	505	502	500	511	510	3058

Total sample; Unweighted; base n = 3058

Fellowmind