The Future of Work and Digital Transformation

March 2021

Images credit: Pexels, Unsplash, & Envato elements
Objectives & Methodology

OBJECTIVES
Understand the behaviors and attitudes of current Business End Users (BEU) and IT Decision Makers across all business sizes who have been forced to work from home (WFH) due to Covid-19:

- What are the challenges of WFH?
- What collaboration tools are being used?
- How satisfied are they with their job with the WFH transition?
- Where do BEUs want to work once Covid-19 is no longer a concern?
- How have tech issues impacted BEUs WFH?
- How has Covid-19 impacted the business model, services used, and security concerns by ITDMs?
- What investments in digital solutions have been made by ITDMs?
- ITDM Interest in DaaS model

METHODOLOGY
- Quantitative online survey, 10-minutes
- Fielded to external panels
- Fieldwork: Jan. 15th – Feb. 11th, 2021
- Total and Business End User /IT Decision Maker data is weighted. Individual market data is unweighted
- Stat testing
- ▲▼ shown for significant differences in business sizes
- All stat testing done at 95% confidence level. Not shown for base sizes <50

SAMPLE
- Business End User (BEU): currently working from home and worked in the office prior to Covid-19
- IT Decision Makers (ITDM): if their company has made policy changes/work location changes due to Covid-19 at any point since March 2020

TOTAL n=8,533

Australia  n=596
Brazil  n=600
China  n=600
France  n=627
Germany  n=622
India  n=600
Indonesia  n=610
Italy  n=625
Japan  n=609
Mexico  n=613
Russia  n=600
Singapore  n=613
UK  n=600
USA  n=618

n~75-100 per business size per market (Very small/small, Medium, Large)
Respondent Profile

**Market**

- Australia: 7%
- India: 7%
- Japan: 7%
- China: 7%
- France: 7%
- Germany: 7%
- Italy: 7%
- Russia: 7%
- UK: 7%
- Brazil: 7%
- Mexico: 7%
- USA: 7%
- Indonesia: 7%
- Singapore: 7%

**Gender**

- Male: 61%
- Female: 39%

**Age**

- 18-34: 35%
- 35+: 65%

**Business Size | BEU**

- Very small/Small: 30%
- Medium: 35%
- Large: 35%

**Business Size | ITDM**

- Very small/Small: 33%
- Medium: 33%
- Large: 34%

Base: Total (n=8,533)
Base: Gender & Age (n=8,493)
Base: Total BEU (n=4,126) | Base: Total ITDM (n=4,407)
Table of Contents

- Key Findings and Summary
- Response to WFH/Covid-19 (BEUs)
- Business/workplace changes due to Covid-19 (ITDMs)
- WFH wardrobe/collaboration tools (BEU + ITDMs)
- Digital transformation (ITDMs)
- DasS - Device as a Service (ITDMs)
Many of the ways that workplaces have transformed in response to the pandemic are here to stay. It’s fair to say that the **office as we knew it is gone**

Workers are in a groove with working from home now and feel **it’s a net positive** situation compared to their previous traditional office routine.

Part of what’s making this work is the **wide adoption of collaboration software**, something nearly all companies have adopted. **Zoom** is the most used, followed by **Microsoft** (Teams, Office 365) and **Google** (Meet, Docs).

One piece of tech that’s being used more is the smartphone, with the **majority using their phone for work purposes**. It’s being used most frequently as a way to **communicate within their teams**, likely due to the increase in collaboration tool usage.

There is **significant interest in DaaS**, more so in Medium and Large companies, who see its top benefits as **freeing up time** for more strategic projects and keeping **hardware up to date**
Response to WFH/Covid-19

Employees
BEUs of all ages are satisfied with their job while WFH. Younger BEUs struggle with work-life balance, but also appreciate the flexibility of WFH policies.

### Agreement Levels of Working During Covid-19

<table>
<thead>
<tr>
<th>Statement</th>
<th>18-34</th>
<th>35+</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel like there’s more time in the workday, because I am no longer commuting</td>
<td>78%</td>
<td>75%</td>
</tr>
<tr>
<td>I feel my company has been able to operate normally during the pandemic</td>
<td>75%</td>
<td>68%</td>
</tr>
<tr>
<td>I think my company will operate as per normal if everyone continues to work from home</td>
<td>67%</td>
<td>62%</td>
</tr>
<tr>
<td>I’ve struggled with keeping my work life and home life separate, while working from home</td>
<td>74%</td>
<td>54%</td>
</tr>
<tr>
<td>I feel like I work more hours each day, now that I work from home</td>
<td>65%</td>
<td>56%</td>
</tr>
<tr>
<td>I am more productive, while working from home</td>
<td>59%</td>
<td>54%</td>
</tr>
<tr>
<td>The lack of physical interaction causes me anxiety or added stress</td>
<td>63%</td>
<td>52%</td>
</tr>
<tr>
<td>I feel mentally drained because I have trouble switching off from work</td>
<td>53%</td>
<td>41%</td>
</tr>
</tbody>
</table>

### WFH Job Satisfaction

<table>
<thead>
<tr>
<th></th>
<th>18-34</th>
<th>35+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive</td>
<td>73%</td>
<td>69%</td>
</tr>
<tr>
<td>Negative</td>
<td>73%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Base: BEU Aged 18-34 (n=1,452), Age 35+ (n=2,638)
Working from home has not brought on a host of tech issues, and those that workers have tend to be connection based which is only a moderate or non-issue.

**Cadence of Tech Issues/Problems WFH**  
*Total BEU data shown*

<table>
<thead>
<tr>
<th>Issue</th>
<th>More than in office</th>
<th>About the same</th>
<th>Haven't had this issue</th>
<th>Less than in office</th>
<th>Same or better</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows not working correctly</td>
<td>15%</td>
<td>30%</td>
<td>46%</td>
<td>9%</td>
<td>85%</td>
</tr>
<tr>
<td>Can't send/receive email</td>
<td>16%</td>
<td>28%</td>
<td>47%</td>
<td>9%</td>
<td>84%</td>
</tr>
<tr>
<td>Can't access company websites/intranets</td>
<td>26%</td>
<td>28%</td>
<td>38%</td>
<td>8%</td>
<td>74%</td>
</tr>
<tr>
<td>Specific software not working correctly</td>
<td>28%</td>
<td>31%</td>
<td>33%</td>
<td>8%</td>
<td>72%</td>
</tr>
<tr>
<td>Internet connection stops working</td>
<td>29%</td>
<td>24%</td>
<td>36%</td>
<td>11%</td>
<td>71%</td>
</tr>
<tr>
<td>Can't access company files</td>
<td>29%</td>
<td>26%</td>
<td>36%</td>
<td>9%</td>
<td>71%</td>
</tr>
<tr>
<td>Internet connection is slow</td>
<td>36%</td>
<td>25%</td>
<td>28%</td>
<td>11%</td>
<td>64%</td>
</tr>
</tbody>
</table>

**Severity of Tech Issue Disruptions While WFH**  
*Total BEU data shown – Omitting those that haven’t had that issue*

<table>
<thead>
<tr>
<th>Issue</th>
<th>Big disruption</th>
<th>Moderate issue</th>
<th>No issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows not working correctly</td>
<td>25%</td>
<td>39%</td>
<td>23%</td>
</tr>
<tr>
<td>Can't send/receive email</td>
<td>21%</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>Can't access company websites/intranets</td>
<td>20%</td>
<td>39%</td>
<td>28%</td>
</tr>
<tr>
<td>Specific software not working correctly</td>
<td>20%</td>
<td>37%</td>
<td>25%</td>
</tr>
<tr>
<td>Can't access company files</td>
<td>19%</td>
<td>35%</td>
<td>25%</td>
</tr>
<tr>
<td>Internet connection stops working</td>
<td>18%</td>
<td>38%</td>
<td>30%</td>
</tr>
<tr>
<td>Internet connection is slow</td>
<td>17%</td>
<td>32%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Market differences: Indonesia and India more difficulty across all issues for all business sizes; Mexico also more difficulty on many tech issues but only in large businesses; similarly Singapore reports more difficulties but only in medium businesses.
Over a third of BEUs across business sizes haven’t had issues with IT support while WFH. Those that have, sometimes it takes longer or is simply difficult to get at all.

**IT Assistance Experience While WFH**

<table>
<thead>
<tr>
<th>Issue</th>
<th>VS/Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haven’t had problems with getting IT support</td>
<td>38%</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Haven’t needed IT support</td>
<td>25%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>Difficult to get IT support in general</td>
<td>21% ▲</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>IT support takes longer</td>
<td>21%</td>
<td>30% ▲</td>
<td>26%</td>
</tr>
<tr>
<td>Unable to get required accessories from IT</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Market differences:** VS/S in China report fewer issues with IT support; India and Indonesia having significant difficulties in medium and large businesses.
Very few employees want to go back to a daily office routine, with most preferring at least an even split with working from home.

### Work Location Preference without Covid-19 Issue

<table>
<thead>
<tr>
<th>Location Preference</th>
<th>VS/Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>WFO 100%</td>
<td>23%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>WFO Mostly</td>
<td>21%</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>Even split</td>
<td>17%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>WFH Mostly</td>
<td>24%</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>WFH 100%</td>
<td>10%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>1 week/mon.</td>
<td>4%</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Alternate weeks**

- **NET Office**: 44% ▲ M, L
- **NET Home**: 34% ▲ L

### Data Breakdown

- **NET Office**: 41% ▲ L
- **NET Home**: 36% ▲ L

### Market Differences

- India heavily leaning towards 100% work from office across all business sizes.
- Indonesia among medium and large.
- Mexico among large businesses.
- These are also the markets & business sizes that are having the most difficulties with tech issues.

*Base: BEU VS/Small (n=1,227), Medium (n=1,450), Large (n=1,449)*
Majority of employees prefer to continue working from home. Younger employees are more likely to be among those who prefer to work primarily in the office.

### Work Location Preference without Covid-19 Issue

<table>
<thead>
<tr>
<th>Work Location Preference</th>
<th>18-34</th>
<th>35+</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET: Office</td>
<td>44%</td>
<td>37%</td>
</tr>
<tr>
<td>Even split</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>NET: Home</td>
<td>27%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Note: NET Office consists of WFO 100% and WFO Mostly; NET: Home consists of WFH 100% and WFH Mostly.
Business/workplace changes due to Covid-19

ITDMs
Most businesses anticipate employing some form of a hybrid work model, with employees working both at-home and in the office once Covid is no longer a concern.

### Most Likely Work Location Scenarios without Covid-19 Issue

<table>
<thead>
<tr>
<th></th>
<th>Fully WFH (No offices)</th>
<th>WFH Mostly (Office exists but for vital employees)</th>
<th>Hybrid Model</th>
<th>Mostly WFO</th>
<th>Undecided</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>VS/Small</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16% ▲ L</td>
<td>34%</td>
<td>31%</td>
<td>18%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Medium</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>17% ▲ L</td>
<td>32%</td>
<td>35%</td>
<td>15%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Large</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>11%</td>
<td>29%</td>
<td>40% ▲ vs</td>
<td>19% ▲ M</td>
<td>0%</td>
</tr>
</tbody>
</table>

Market differences:
- **Indonesia** significantly likely to go mostly WFO across all business sizes.

Base: ITDM VS/Small (n=1,471), Medium (n=1,474), Large (n=1,462)
The larger the company, the more confident ITDMs are in their own department, though confidence in the overall company stays flat regardless of size.

**Ability to Keep Company Operations Running as Normal**

<table>
<thead>
<tr>
<th></th>
<th>VS/Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Within Department</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feel confident</td>
<td>51%</td>
<td>57%</td>
<td>60%</td>
</tr>
<tr>
<td>Still work in progress</td>
<td>37% ▲ VS/S M, L</td>
<td>29% ▲ VS/S</td>
<td>27%</td>
</tr>
<tr>
<td>Still putting out fires</td>
<td>12%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Within Company Overall</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feel confident</td>
<td>52%</td>
<td>50%</td>
<td>52%</td>
</tr>
<tr>
<td>Still work in progress</td>
<td>34%</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>Still putting out fires</td>
<td>14%</td>
<td>18%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base: ITDM VS/Small (n=1,471), Medium (n=1,474), Large (n=1,462)
A majority of businesses have both an online and physical presence pre-Covid. Those without an online component have since added one.

**Business Model Prior to Covid-19**

- **VS/Small**:
  - Only online: 9%
  - Only physical: 31%
  - Both: 60%

- **Medium**:
  - Only online: 6%
  - Only physical: 30%
  - Both: 64%

- **Large**:
  - Only online: 7%
  - Only physical: 21%
  - Both: 72%

**How Covid-19 Changed Business**

Among those who had physical locations:

- **VS/Small**:
  - Moved completely online: 11%
  - Added online: 61%
  - No change: 28%

- **Medium**:
  - Moved completely online: 3%
  - Added online: 62%
  - No change: 32%

- **Large**:
  - Moved completely online: 5%
  - Added online: 69%
  - No change: 26%

**Market differences:**

Across all business sizes, USA more likely to only have physical stores; also across all business sizes, USA more likely to have switched to a completely online format.
There's no single challenge with pivoting to online that stands out as a massive issue, with all providing some challenge across business sizes.

### Challenges with Pivoting to Online Business Model

Among those who pivoted to online model

<table>
<thead>
<tr>
<th>Challenge</th>
<th>VS/Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing data security and privacy policies</td>
<td>35%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Concerns about cybersecurity</td>
<td>35%</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>Marketing and education to customers about online presence</td>
<td>31%</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Facilitating meeting between employee and customers</td>
<td>31%</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Finding additional resources to help employees set up their home office</td>
<td>29%</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Setting up online payment systems</td>
<td>28%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Managing employee productivity</td>
<td>27%</td>
<td>30%</td>
<td>27%</td>
</tr>
<tr>
<td>Challenges with quickly scaling up existing servers/online infrastructure</td>
<td>25% ▲ VS/S</td>
<td>33% ▲ VS/S</td>
<td>35% ▲ VS/S</td>
</tr>
<tr>
<td>Having the capital to procure new equipment needed</td>
<td>23%</td>
<td>25%</td>
<td>27%</td>
</tr>
</tbody>
</table>

- Creating a shipping/distribution system                     | 24%      | 24%    | 25%   |
- Having the capital to procure new services needed          | 23%      | 28%    | 27%   |
- Shifting inventory from physical locations to fulfillment centers | 19%      | 24% ▲ VS/S | 25% ▲ VS/S |
- Having to lay off workers in the physical locations        | 16%      | 16%    | 22%   |
- Not having the computers or hardware needed                 | 15%      | 14%    | 14%   |
- No staff to maintain an online presence                     | 12%      | 14%    | 11%   |
- No staff to build an online presence                        | 10%      | 13%    | 15% ▲ VS/S |
- Not knowing where to start                                  | 10%      | 9%     | 10%   |
WFH wardrobe /collaboration tools

Employees + ITDMs
A majority believe that collaboration tools have improved their company’s productivity and efficiency, even with some initial setbacks.

### Collaboration Tools’ Impact On Productivity & Efficiency

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Total</th>
<th>VS/Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>It’s made things more efficient than before</td>
<td>31%</td>
<td>29%</td>
<td>31%</td>
<td>33%</td>
</tr>
<tr>
<td>Some setbacks, but long run improvement</td>
<td>35%</td>
<td>35%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>No difference, we already had collaboration tools in place</td>
<td>14%</td>
<td>15%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>No difference, same productivity and efficiency as without them</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>It’s made things a bit worse, but we’re dealing with it</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>It’s made things worse, it’s a disaster</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Base: Total using at least one collaboration tool (n=8,288), VS/Small (n=2,560), Medium (n=2,869), Large (n=2,859)
Work smartphones are more likely to be BYOD. Communication on a smartphone has become part of workflow post-Covid

**How BEU Acquired the Smartphone**

- **NET: Uses phone for some work**
  - I personally own this and occasionally use it for work: 33%
  - I wanted one for work, and bought it myself: 16%
  - I wanted one for work, and my company bought it for me: 15%
  - My company wanted me to have it and sent me one: 15%
  - I don’t use or need this for work: 15%
  - I wish I had this for work: 6%

- **NET: Self provided**
  - 49%

- **NET: Work provided**
  - 30%

**Work Activities Done on BEU Smartphone More Often than Before Covid-19**

- Voice-only calls: VS/Small 54%, Medium 58%, Large 48%
- Video calls: VS/Small 51%, Medium 59%
- Chatting with coworkers about work: VS/Small 48%, Medium 50%
- Email: VS/Small 44%, Medium 52%
- Reading PDFs: VS/Small 43%, Medium 41%
- Reading Office-style documents: VS/Small 44%, Medium 43%
- Scanning documents to send/save: VS/Small 39%, Medium 44%
- Editing Office-style documents: VS/Small 38%, Medium 39%
- Social media: VS/Small 38%, Medium 43%
- Researching topics: VS/Small 39%
- Chatting casually with coworkers: VS/Small 37%, Medium 43%
- Marketing: VS/Small 32%
- AR/VR experience: VS/Small 30%
Younger BEUs are more likely to use smartphones for work, bring their own, and use them for a variety of work tasks.

**How BEU Acquired the Smartphone**

<table>
<thead>
<tr>
<th></th>
<th>18-34</th>
<th>35+</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET: Uses phone for some work</td>
<td>87%</td>
<td>76%</td>
</tr>
<tr>
<td>NET: Self provided</td>
<td>59%</td>
<td>45%</td>
</tr>
<tr>
<td>NET: Work provided</td>
<td>28%</td>
<td>31%</td>
</tr>
</tbody>
</table>

- I personally own this and occasionally use it for work
  - 18-34: 18% | 35+: 25%
- I wanted one for work, and bought it myself
  - 18-34: 25% | 35+: 31%
- I wanted one for work, and my company bought it for me
  - 18-34: 12% | 35+: 16%
- My company wanted me to have it and sent me one
  - 18-34: 8% | 35+: 15%
- I don’t use or need this for work
  - 18-34: 5% | 35+: 6%
- I wish I had this for work
  - 18-34: 6% | 35+: 5%

**Work Activities Done on BEU Smartphone More Often than Before Covid-19**

- **Voice-only calls**: 18-34: 49% | 35+: 62%
- **Video calls**: 18-34: 50% | 35+: 61%
- **Chatting with coworkers about work**: 18-34: 42% | 35+: 52%
- **Email**: 18-34: 42% | 35+: 55%
- **Reading PDFs**: 18-34: 34% | 35+: 52%
- **Reading Office-style documents**: 18-34: 37% | 35+: 49%
- **Scanning documents to send/save**: 18-34: 36% | 35+: 48%
- **Editing Office-style documents**: 18-34: 31% | 35+: 47%
- **Social media**: 18-34: 32% | 35+: 52%
- **Researching topics**: 18-34: 33% | 35+: 44%
- **Chatting casually with coworkers**: 18-34: 35% | 35+: 42%
- **Marketing**: 18-34: 27% | 35+: 39%
- **AR/VR experience**: 18-34: 25% | 35+: 37%

Base: Total BEUs 18-34 (n=1,452), Age 35+ (n=2,638)
Base: BEUs using smartphone for work 18-34 (n=1,119), Age 35+ (n=2,152)
Digital Transformation

ITDMs
Data security and being able to feel like they still have control are top of mind for ITDMs when considering digital transformation solutions.

**Top Digital Transformation Considerations**

Max of 3 selected

- **Data security**: 40% (VS/Small), 38% (Medium), 40% (Large)
- **IT management of the solution**: 32% (VS/Small) ▲ VS/S, 31% (Medium)
- **Employee productivity**: 27% (VS/Small), 24% (Medium), 26% (Large)
- **Operating costs**: 25% (VS/Small) ▲ L, 21% (Medium), 19% (Large)
- **Data privacy**: 24% (VS/Small), 28% (Medium), 26% (Large)
- **Business continuity**: 19% (VS/Small) ▲ L, 22% (Medium), 22% (Large)
- **Reassure clients and customers**: 16% (VS/Small), 13% (Medium)

Other considerations:

- **Budget**: 18% (VS/Small), 17% (Medium), 16% (Large)
- **Staying competitive**: 22% (VS/Small) ▲ VS/S, 20% (Medium)
- **Employee satisfaction**: 16% (VS/Small), 15% (Medium), 18% (Large)
- **Drive better customer experience**: 15% (VS/Small), 16% (Medium), 19% (Large)
- **Industry standards**: 13% (VS/Small), 11% (Medium), 12% (Large)
- **Adopting a cloud-first model**: 12% (VS/Small), 15% (Medium), 16% (Large) ▲ VS/S
- **Real estate costs**: 6% (VS/Small) ▲ VS/S, 6% (Medium)
- **Budget**: 13% (VS/Small), 17% (Medium), 16% (Large)
- **Staying competitive**: 22% (VS/Small) ▲ VS/S, 20% (Medium)
- **Employee satisfaction**: 16% (VS/Small), 15% (Medium), 18% (Large)
- **Drive better customer experience**: 15% (VS/Small), 16% (Medium), 19% (Large)
- **Industry standards**: 13% (VS/Small), 11% (Medium), 12% (Large)
- **Adopting a cloud-first model**: 12% (VS/Small), 15% (Medium), 16% (Large) ▲ VS/S
- **Real estate costs**: 6% (VS/Small) ▲ VS/S, 6% (Medium)
All-in-one hardware/software bundles, training sessions, and ROI reports are among the most useful strategy solutions, especially among ITDMs at large businesses.

Useful Remote Work From Home Strategy Solutions

- Training sessions for employees
- All-in-one package with hardware and software/services bundled
- Training documentation for employees
- Testimonials from workers using the solutions
- Flexible purchasing arrangements
- Return on Investment (ROI) reports
- Thought leadership from OEMs
- Testimonials from others in my industry
- Use cases

Base: ITDM VS/Small (n=1,471), Medium (n=1,474), Large (n=1,462)
Device As A Service (DaaS)

ITDMs
A majority of ITDMs are interested in DaaS, more so in larger companies, citing tangible benefits for IT, scalable and up-to-date hardware.

**DaaS Interest**
Extremely/Very interested

<table>
<thead>
<tr>
<th></th>
<th>VS/Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>53%</td>
<td>68%</td>
<td>67%</td>
</tr>
<tr>
<td></td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
</tr>
<tr>
<td></td>
<td>8% already use DaaS-like service</td>
<td>12% already use DaaS-like service</td>
<td>11% already use DaaS-like service</td>
</tr>
</tbody>
</table>

**Benefits of DaaS**
Among those at least somewhat interested

<table>
<thead>
<tr>
<th>Benefit</th>
<th>VS/Small</th>
<th>Medium</th>
<th>Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Able to focus our in-house IT team on more strategic projects</td>
<td>48%</td>
<td>55%</td>
<td>49%</td>
</tr>
<tr>
<td>Ability to scale hardware needs over time</td>
<td>41%</td>
<td>44%</td>
<td>41%</td>
</tr>
<tr>
<td>Easier to have more up-to-date hardware</td>
<td>39%</td>
<td>46%</td>
<td>51%</td>
</tr>
<tr>
<td>No need to worry about the details of managing hardware life cycles</td>
<td>35%</td>
<td>32%</td>
<td>38%</td>
</tr>
<tr>
<td>Moving expenses from capital expenditures to operational expenditures</td>
<td>30%</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Only have one provider to hold accountable for both hardware and software</td>
<td>28%</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>Only have one company to contract with</td>
<td>26%</td>
<td>27%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Base: ITDM at least somewhat interested in DaaS

VS/Small (n=1,252), Medium (n=1,396), Large (n=1,343)
thanks.

Smarter technology for all