

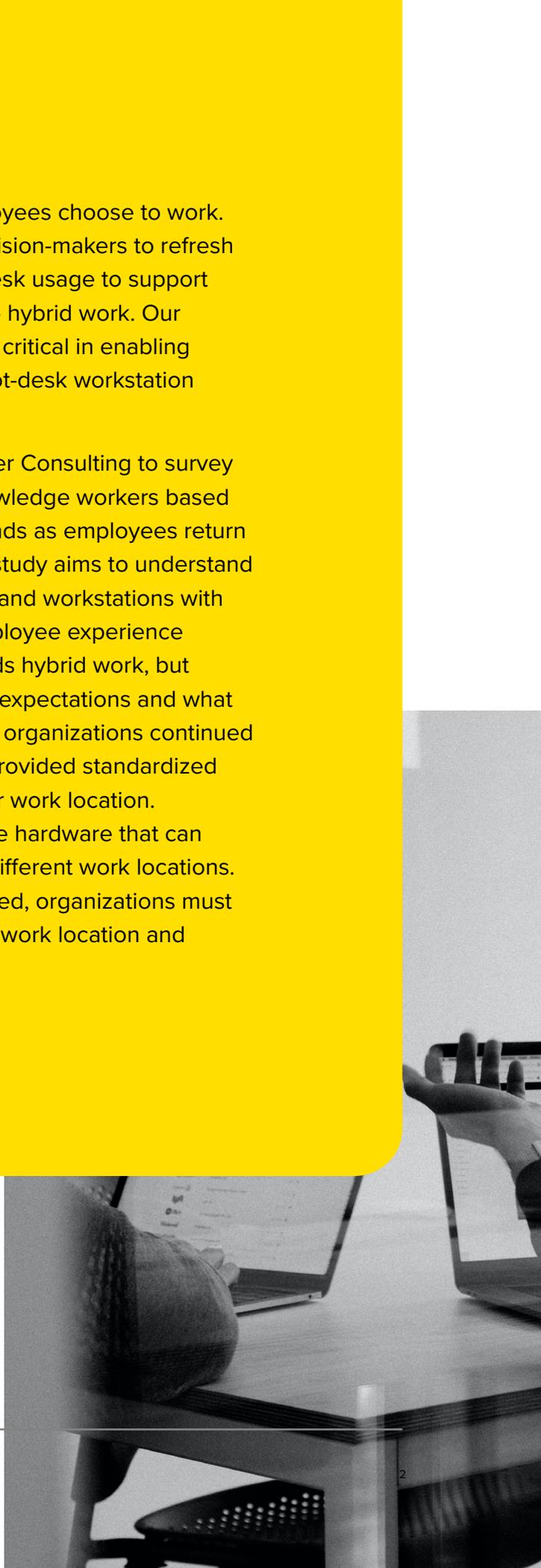
FORRESTER®

The Future Workplace Calls For A Customized Monitor Approach

Executive Summary

The pandemic has reshaped how and where employees choose to work. The last two years have influenced IT business decision-makers to refresh their office spaces —including reconceptualizing desk usage to support employees as they transitioned from fully remote to hybrid work. Our research in 2021 found that external monitors were critical in enabling effective hybrid work across home, in-office, and hot-desk workstation arrangements.¹

This year, Dell Technologies commissioned Forrester Consulting to survey 300 senior business decision-makers and 300 knowledge workers based in APAC, Europe, and North America to explore trends as employees return to office and their need for external monitors. This study aims to understand how organizations can best equip their employees and workstations with external monitors to maximize productivity and employee experience (EX). Most industries and roles were inclined towards hybrid work, but there seemed to be a disparity between employee expectations and what organizations were providing.² We found that many organizations continued to follow a one-size-fits all monitor approach, and provided standardized monitors to all employees regardless of their role or work location. Meanwhile, employees are expecting fit-for-purpose hardware that can support specific needs (e.g., collaboration) across different work locations. To ensure employees are being adequately equipped, organizations must understand their employees' expectations for each work location and provide tailored monitor features accordingly.

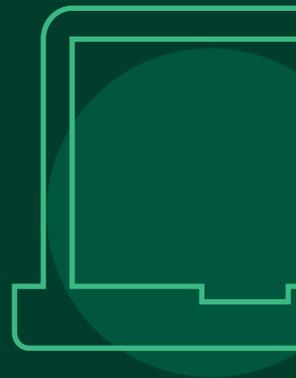


Key Findings

Hybrid work continues, and hardware technology is a key driver for EX. In the next 12 to 18 months, 65% of knowledge workers will be working on a hybrid arrangement. Of them, 66% aim to return to the office at least twice a week. Over 50% of employees rated external monitors as the most important device to their productivity across different work set ups. As employees will be working from various locations, organizations must revise their workplace and hardware provisioning strategies to respond accordingly.

Expectations for a consistent hybrid experience are not being met. Employers need to provide fit-for-purpose technology and hardware to employees — this includes offering monitors with features tailored to employees' needs. Only a third of knowledge workers strongly agreed that their current office and home workstations adequately supported their roles and responsibilities, and only 19% of organizations currently have a monitors policy that matched employees' needs.

Organizations should adopt a fit-for-purpose approach when equipping workstations with monitors. Our research found that each work location served its own unique purpose and should be equipped accordingly. Knowledge workers prioritized efficiency and usability when working from home; productivity and comfort at an individual desk; collaboration and mobility at a hot desk, but peripherals were also considered particularly important in this set up for employees to be productive.³



The Return To Office Calls For A Renewed Workplace And Hardware Strategy

To adapt to the onset of hybrid work arrangements, organizations must understand their employees' needs and continue to rebuild their current workplace. As employees return to the office, they expect each of their work locations to serve different purposes. Tailoring hardware provisioning at each location will hence maximize their performance.

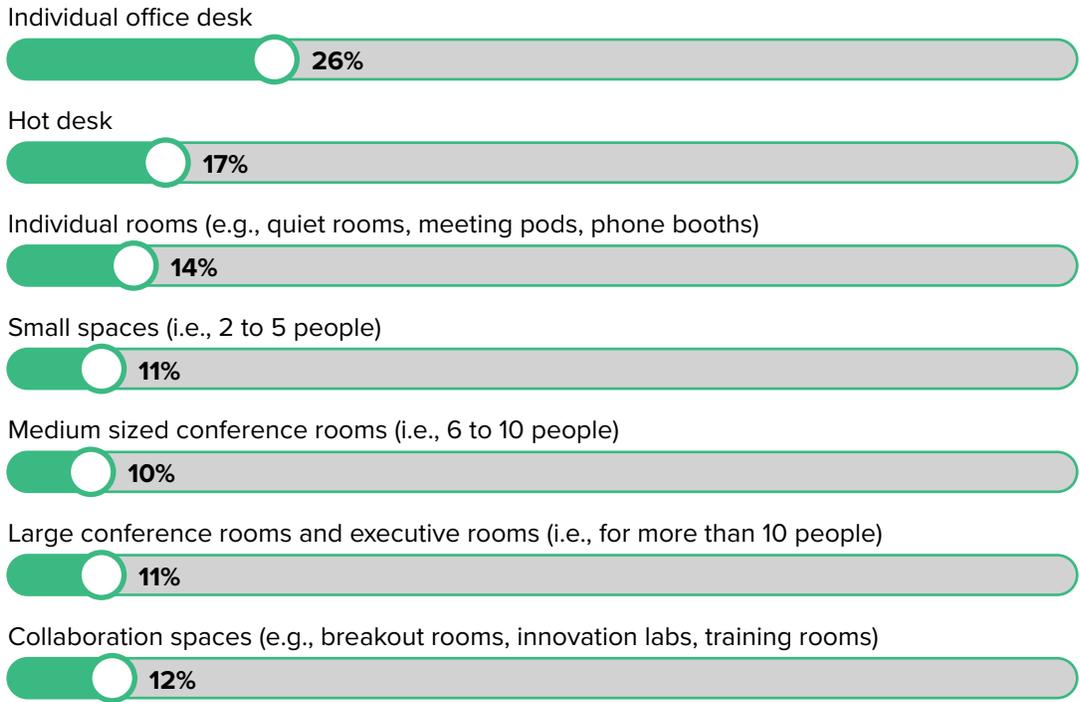
Knowledge workers are seeking flexible work arrangements post-pandemic and will be working from various work locations. The hybrid work arrangement is inevitable in the post-pandemic world as employees seek flexibility in where they work.⁴ Forty-four percent of employees currently engage in hybrid work and 65% indicated they were planning to work hybrid in the next 12 to 18 months. In the coming year, employees will be working from a variety of workstations, with the top three being: onsite individual office desks (26%), hot desks (17%), and individual rooms (14%).⁵ Notably, the use of collaboration spaces (12%) is increasing as employees sought innovative and stimulating spaces for brainstorming and team-based tasks (see Figure 1). Depending on the nature of work in the industry, workstation preferences can differ. For instance, knowledge workers from the energy and IT industries spent 14% of their time working at hot desks compared to 25% for knowledge workers from the retail and CPG industry, who reported better collaboration with teams (78%) as the most important reason influencing their decision to return to the office.

Hardware technology is a key driver impacting EX and motivation to return to office. Quality and suitable hardware can contribute directly to retaining talent, improving employee satisfaction, and encouraging in-person presence. An increasing number of knowledge workers will be working in the office for better collaboration with teams (72%), better office workstation set ups compared to at home (69%), better office equipment (68%), and improved productivity (66%). This showed that making the right decisions around EX and technology provisioning will directly encourage employees to return to the office, shape a company's culture, and drive business outcomes. These outcomes included an increase in employee engagement, better communication and collaboration amongst employees, all of which ultimately led to enhanced work productivity.⁶

Figure 1

Percentage Of Time Knowledge Workers Expect To Be Working From Office Spaces In the Next 12 To 18 Months

(Showing average for each on-site office location)



Base: 300 knowledge workers based in APAC, Europe, and North America

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, May 2022

Knowledge workers have different expectations for home, hot desk and on-site individual desk setups, and must be equipped accordingly.

External monitors play a pivotal role in hardware strategy to boost EX, and organizations must carefully consider the best way to equip each work environment with tailored monitor features. For example, monitor connectivity features (50%) were key for employee productivity at individual desks. At hot desks however, having a dedicated video conferencing button was a key differentiator as it emphasized collaboration (59%) (see Figure 2).

Over 50%
of employees rated external monitors as one of the most important devices to their productivity across all three main work environments.

In particular, knowledge workers in the public services sector placed high emphasis on collaboration features at hot desks (62%), and connectivity features at on-site individual desks (57%). With 39% of the workforce shifting to full-time work on-site and 58% to hybrid, it is increasingly important for organizations in the public sector to understand their industry work trends and appropriately equip workstations with fit-for-purpose monitors. Lastly, peripherals were considered on average 10% more important for employees to be productive at hot desks compared to at home setups and individual desks. Hence, to achieve a flawless EX and meet employee needs, it is key for organizations to ensure that hot desks are well-equipped with the peripherals employees require to efficiently conduct their daily tasks.

Figure 2

“Which of the following monitor features are the most important for you to be productive?”

HOME SET UP

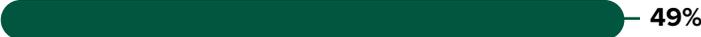
Warranty (e.g., vendor warranty, after sales support)



Regulatory (e.g., energy efficiency, regulatory and environmental standard certifications)



Usability (e.g., design of the monitor, ergonomics features, portability, KVM, remote management)



HOT DESKING SET UP

Collaboration (e.g., built-in camera, mic, speaker, dedicated video conferencing buttons, video conferencing certification)



Screen (e.g., screen size, screen resolution, color precision, panel type, refresh rate)



Usability (e.g., design of the monitor, ergonomics features, portability, KVM, remote management)



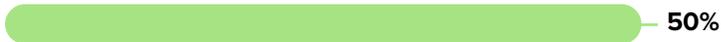
Base: 300 knowledge workers based in APAC, Europe and North America
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, May 2022

Figure 2 (continued)

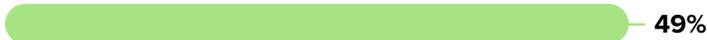
“Which of the following monitor features are the most important for you to be productive?”

OFFICE/ON-SITE INDIVIDUAL DESK

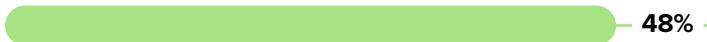
Connectivity (e.g., number of ports & types, RJ-45 port, USB-C cable)



Usability (e.g., design of the monitor, ergonomics features, portability, KVM, remote management)



Collaboration (e.g., built-in camera, mic, speaker, dedicated video conferencing buttons, video conferencing certification)



Base: 300 knowledge workers based in APAC, Europe and North America

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, May 2022

Tailored monitor features help knowledge workers effectively perform their role. In a typical 8-hour workday, knowledge workers estimated they were spending an average of 15% of their time on collaboration tasks, 44% on advanced tasks, and 41% on standard tasks. Knowledge workers in North America engaged in more remote collaboration as they spent more time on video calls (i.e., 55 minutes on average per day) compared to APAC (34 minutes on average per day). The disparity in where and how employees were working called for tailoring monitor features to improve their work experience and productivity. For example, collaboration features were the most important to the productivity of the sales/customer support team at a hot desk (59%) compared to the facilities management team who valued connectivity more (59% vs. 44% for collaboration). So how are organizations responding to evolving employee needs and fast-changing working environments?

“We never make the hardware choice alone for workstations, we will always ask our employees what they need. We find that this method helps us get validation and offer best features to the users. For example, our finance team prioritizes dual monitors and easy connectivity, but doesn’t necessarily need 4k resolution.”

**Chief technology officer,
personal care product
manufacturing company, Europe**

Survey options were categorized based on nature of tasks:

Collaboration tasks

include video calls and audio-only calls.

Advanced tasks

include designing marketing collateral, viewing/editing photos/videos, designing products/components and preparing/reading technical drawings/readouts.

Standard tasks

include reading/responding to emails, completing administrative tasks, preparing/reading documentation and/or presentations and conducting secondary research.

Organizations Must Take A Tailored Approach To Monitors To Meet Employee Expectations

The future workplace is more collaborative, customized, and supportive of flexible hybrid work arrangements. However, employee expectations are not yet met. Our research found that enabling knowledge workers to be productive and collaborative required organizations to provide fit-for-purpose technology and hardware such as monitors.

Organizations are actively reviewing their workplace arrangement.

More than 60% of employers acknowledged the need to have an adaptable framework for local pandemic-related changes, with consistent review of employee working experiences across different sites and locations. Seventy-one percent also planned to review their return-to-work policy and general working arrangements several times per year. This enabled them to adapt to the fast-changing working environment and showed that most organizations recognized the need to understand their employees and were ready to adapt. It is now time for them to build concrete plans, such as consistent collaborative set ups across sites to meet employee demands and foster collaboration.

Organizations are rethinking office space design. Firms have started to transform the workplace into an environment that can foster collaboration, with 43% planning to increase the number of collaborative spaces available at the office (e.g., break out rooms, innovation labs, training rooms). As a result, the average office area occupied by collaboration spaces will increase to 14% in the next 12 to 18 months, compared to 10% today. Organizations are also increasingly catering towards flexible working styles by increasing or transitioning to hot desking and increasing the number of small meeting rooms (see Figure 3).

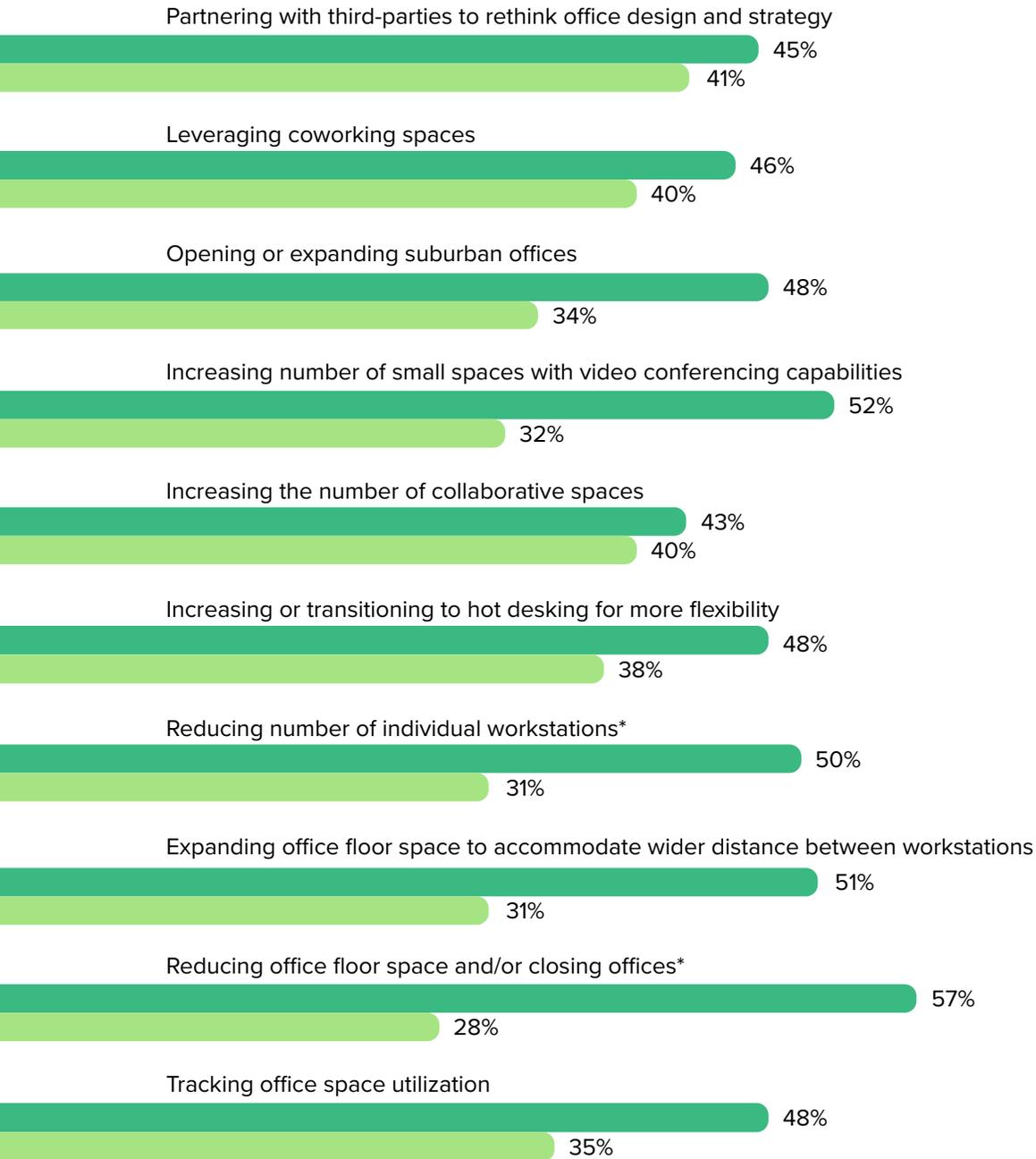
“We’ve redesigned our flagship office in New York City to include mostly hot seats. However, people had difficulties finding out where their colleagues were, so in collaboration with employees, we attributed spaces to each team on the different floors — where everyone can continue to use hot seats. That allowed us to equip all the hot desks for our traders’ team with ultrawide screens.”

Director of technology business management, financial services, North America

Figure 3

Organizations Have Plans To Support Hybrid Work

● Considering to implement in the next 12 to 18 months ● Already implemented



*Note: As employees work from home

Base: 300 senior business decision-makers based in APAC, Europe, and North America involved in the organization's EX, workplace design, and user hardware strategy

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, May 2022

BUT ORGANIZATIONS NEED TO DO MORE TO MEET EMPLOYEES' EXPECTATIONS

Expectations for a consistent hybrid experience are not met by employers.

Despite best efforts to transform the workplace, employers were not always aware of employees' preferences when it comes to workstations, equipment, and monitor features, thus creating a gap between employee preferences and what organizations were providing. For instance:

- Organizations indicated they will continue to utilize 44% of their office space for individual office desks in the next 12 to 18 months, when employees expected to spend more time working at hot desks and meeting rooms.
- Only a third of knowledge workers strongly agreed that their office workstations (37%) and home workstations (35%) adequately supported their roles and responsibilities.
- Employers were considering collaboration features when selecting monitors to equip individual desks whereas employees were prioritizing connectivity features. Moreover, collaboration was the most important feature for employees at a hot desking set up, but only the fourth most important to IT decision-makers in their purchase decision.

The one-size-fits-all monitor approach is still predominant, but some employees benefitted from a customized approach.

Our qualitative interviews highlighted the success of customized approaches: IT-decision makers reported providing tailored monitors to specialized roles such as portable monitors for sales teams, dual monitors for finance and trading teams in the office and allowing employees to test monitors before committing to them to ensure best alignment. A decision-maker also reported that their organization had a custom category for employees who required a tailored approach based on their roles and where they usually worked.



Monitors are key to enabling productivity. Our research found that 68% of notebook users with an external monitor reported feeling productive and empowered to get their work done, compared to only 38% of workers not using a monitor.⁷ Employers also reported improved employee productivity of up to 18% and better employee collaboration after investing in external displays.⁸ Employees could conduct some daily tasks more efficiently, reduce time spent scrolling or switching between windows, and were able to multitask better from being able to open multiple windows at the same time.

Monitors are critical assets to improve collaboration. When using external monitors, employees reported an increase in their ability to present and share their screen during calls (59%), collaborate easily (56%), and conduct virtual training efficiently (31%).⁹ This showed how an external monitor could support distant collaboration efforts. It provided employees with additional information or script on display and presented the opportunity for multitasking during meetings. Some monitors also included a built-in microphone and camera that improved the quality of virtual meetings.

As knowledge workers return to the office and continue to adopt anywhere-work, how can organizations use monitors to help provide consistent EX, and encourage productivity and collaboration?

Use A Fit-For-Purpose Approach Based On Roles And Locations When Equipping Workstations With Monitors

Ad-hoc tailoring hardware to employees is not enough in meeting both role and location needs. Employers must put policies in place, consider providing monitors based on employee role profiles, and adequately help equip different locations to suit distinct employee work styles. This customized approach to hardware and monitors will enable anywhere-work EX, which is key to increased employees productivity and collaboration. This fit-for-purpose approach can also apply to hot desking.

Companies often create hot desking spaces for all roles, but certain roles (e.g., data analysts and creative teams) need specific monitor features. Allocating special hot desking areas, either by roles or departments, provides employees with fit-for-purpose technology while leveraging the benefits of hot desking. Our research found that monitors can be used to help design these anywhere-work employee experience by fulfilling specific employees' needs:

AT HOME

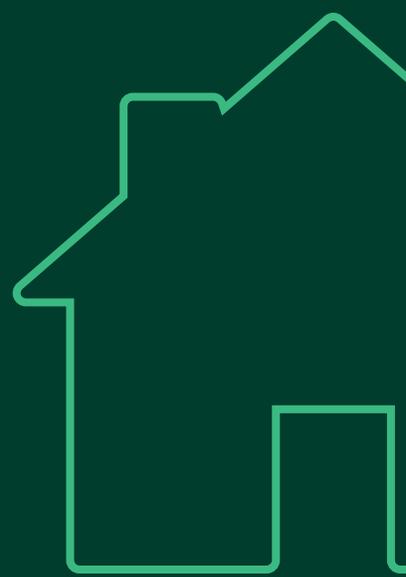
Knowledge workers valued **efficiency** and **usability** the most, and predominantly chose to use single monitors. To enable virtual meetings, monitors were often paired with devices centered around collaboration (e.g., webcams, speakerphones). When providing monitors to equip home setups, organizations must consider employees' ideal monitor features:

1. Warranty and after-sales support for sufficient IT support when hardware failure occurs at home.

2. Collaborative features such as integrated microphone or camera to support remote work.

3. Energy efficiency to reduce home office costs.

4. Ergonomic features to support employee well-being.



AT AN INDIVIDUAL DESK

They focused on **productivity** and **comfort**, making ultra-wide monitors the number one choice for employees. To meet employees' needs and expectations when working at individual desks, organizations must select monitors with:

1. Connectivity features, such as USB-C and a large number and variety of ports, to connect easily and work productively (e.g., DP, HDMI, USB downstream ports, RJ45).

2. Ergonomic features to improve comfort (e.g., low blue light emission, height adjustable stand).

3. Higher specifications for specialized roles (e.g., screen resolution, color precision).



AT A HOT DESK

Peripherals were considered particularly important for productivity in this set up. Companies must consider improving their peripheral set ups at hot desks to meet employee needs, especially around **collaboration** and **mobility**. Our research also found that knowledge workers especially appreciated working at hot desks equipped with dual monitors, and that companies should prioritize monitors offering:

1. Collaborative features such as dedicated video conferencing buttons, and video conferencing certifications to support ease of collaboration.

2. Integrated or flexible collaboration accessories required to support calls and team-based tasks.

3. Connectivity features such as the number and types of ports to allow users to move around freely with the hot desk set up and easily connect to different resources.



Key Recommendations

Forrester's in-depth survey of 300 senior business decision-makers and 300 knowledge workers based in APAC, Europe and North America yielded several important recommendations on how to use monitors to help enable an anywhere-work EX and bridge the gap between employees' expectations and existing provisions. Implementing this fit-for-purpose approach requires organizations to:

Revisit workspace planning and budget allocation.

Organizations are reimagining the office based on experiences from fully remote work, while aiming to recapture some of the benefits of in-person office usage. For most, the answer is to adopt hot desking. However, flexible desk arrangements can only promote collaboration if done with the right strategies and investments. Successful hot desking requires plenty of data and insights, followed by iterations and improvements based on performance.¹⁰

Create custom hardware provisioning categories for employees based on their role profiles and most preferred work locations.

Employers must assess whether knowledge workers have access to their preferred monitors when working from home or at an individual desk. Creating custom hardware provisioning categories for these two types of workstations will allow employees to select the appropriate monitor for their needs, increasing their productivity and ability to collaborate.

“Managers don't always know what is best for the employees, so we have a hardware catalogue revised regularly by the procurement team which offers a wide range of monitors. Employees can go and select monitors that suit their needs, and this approach has improved our employee experience.”

General manager, industrial machinery manufacturing company, APAC

Regularly collect employee sentiment and ensure feedback is actioned accordingly to elevate EX.

To provide fit-for-purpose hardware tailored to employee needs, organizations must understand employee's expectations for a consistent hybrid work experience across different location. For that, they should learn from their employees' expertise and show that they care about their input. Employees that are directly involved and have influence over their work — and how they work — are more empowered and engaged. Organizations must augment surveys with actual observations and contextual interviews of their employees to better understand what improvements in their working styles and conditions would really make a difference. Based on these findings, organizations can then decide which technology they should deploy, and when.¹¹

Appendix A: Methodology

Dell Technologies commissioned this study to explore return-to-office trends and employees' needs for external monitors. To achieve these objectives, Forrester conducted three qualitative interviews and an online survey with 300 knowledge workers and 300 senior business decision-makers based in APAC, Europe, and North America who were involved in the organization's employee experience, workplace design and user hardware strategy.

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Contributing Research:

Forrester's Customer Experience research group

Appendix C: Endnotes

¹ Source: "Power Up Your Hybrid Workplace With Monitors," a commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, June 2021.

² Disclaimer: Hybrid work may not be applicable to some industries and/or roles where there is heavy reliance on in-person presence.

³ Survey options were categorized based on nature of feature. Connectivity includes number of ports & types (i.e., RJ-45 port and USB-C cable). Usability includes design of the monitor, ergonomic features, portability, keyboard, video, and mouse (KVM), and remote management. Collaboration includes built-in camera, mic, speaker, dedicated video conferencing buttons and video conferencing certifications. Warranty includes vendor warranty and after sales support. Screen includes screen size, screen resolution, color precision, panel type and refresh rate. Regulatory includes energy efficiency, and environmental standard certification.

⁴ Hybrid work arrangement: Employees working from multiple locations (e.g., home, office) on a regular basis (i.e., at least once per week).

⁵ Individual office desk: onsite desks assigned to a single individual. For instance, a closed office.

⁶ Source: "[Don't Miss Your Anywhere-Work Opportunity](#)," Forrester Research, March 29, 2021.

⁷ Source: "Boost Notebook Users' Productivity, Collaboration, And Comfort With Monitors," a commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, November 2021.

⁸ Source: "The Total Economic Impact™ Of Dell Monitors," a commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, May 2022.

⁹ Source: "Boost Notebook Users' Productivity, Collaboration, And Comfort With Monitors," a commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, November 2021.

¹⁰ Source: "[Hot Desks Or Ice-Cold Employee Experiences](#)," Forrester Research Inc., May 26, 2021.

¹¹ Source: "Boost Notebook Users' Productivity, Collaboration, And Comfort With Monitors," a commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, November 2021.

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