



Future of Work

Embracing New Dynamics,
Creating New Experiences

AN IDC INFOBRIEF | OCTOBER 2019

Executive summary

This IDC InfoBrief, sponsored by Dell, presents key findings from a global survey that examines the future of work (FOW) trends and their impact on monitors. The survey included over 300 IT and business decision makers, as well as more than 1,200 employees who use monitors for work across the US, the UK and China markets. The findings present stark differences in opinion of both decision makers and employees around expectations of their work, health and safety; as well as their motivations at work and technology priorities. In many cases, we observed huge variance in the voice of employees versus the decision makers or executives on topics such as device choice, desired features, and factors that impact employee motivation.

This report also examines how the growing adoption of new technologies such as artificial intelligence (AI), augmented/virtual reality (AR/VR) and 3D computing are creating new workloads and demanding better monitors and visualization technologies. In addition, the workforce is increasingly diverse with the expectations of younger generations around mobility, ergonomics, aesthetics and designs being significantly different from the expectations of employers. IT decision makers and line-of-business (LOB) heads recognize that advanced monitors are critical today for supporting a wide variety of emerging data-centric, content and design tasks, as well as for improving productivity. However, the survey also points to the fact that monitors are often not seen as part of the FOW or broader digital transformation initiatives. In fact, more than one-third of IT and business decision makers surveyed replace their monitor only when it breaks or when they relocate; while employees have expressed concerns about productivity loss due to connectivity issues, health issues due to poor ergonomics and other factors that impact their experience negatively.

In order to meet the FOW demands, IT and business decision makers need to redesign their monitor policies by moving away from their one-size-fits-all strategy and adopting a persona-based computing approach. By offering employees more choices, empowering them with the latest technologies and adopting new policies to suit the needs of younger generations, it will not only improve employee productivity but also help organizations attract and retain the best talent.



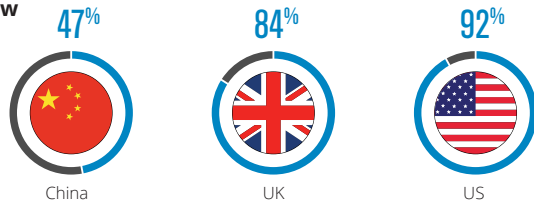
Employee experience is a key differentiator for building a more empowered and motivated workforce

Like happy customers, happy workers become ambassadors of a company. Although almost three-quarters of organizations globally focus on enhancing their employees' working experience, fewer than half (43%) have the right metrics to track how well they are in nurturing employee engagement.

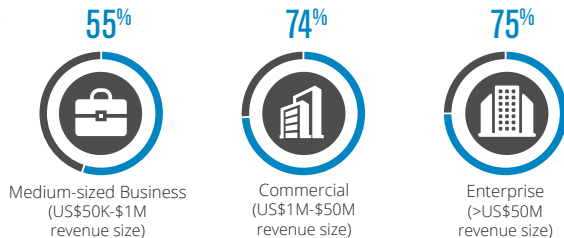


Percentage of organizations that view EX as a top priority

Regional View

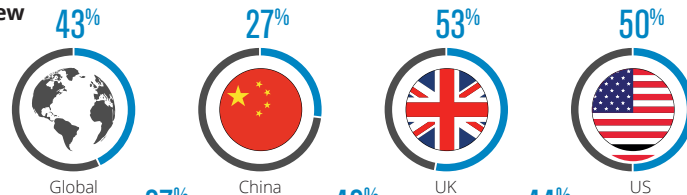


Company Size View

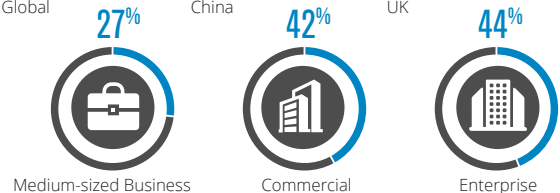


Percentage of organizations using employee NPS or similar metrics for tracking EX

Regional View



Company Size View



Organizations in China lag behind UK and US in measuring EX and using metrics like employee net promoter score (NPS). Clearly, organizations need to do more in terms of moving the needle from intent to action.



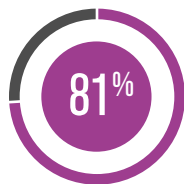
CASE EXAMPLE:

Capital One (a US-based bank) ranks high in Fortune 100 "Best Places to Work" lists three years in a row, based on employee NPS. The company offers multiple benefits and rewards to create an enhanced EX and continuously tracks the NPS by offering superior services to its employees.

Gap exists between how employees and management view the importance of monitors as a workspace enabler

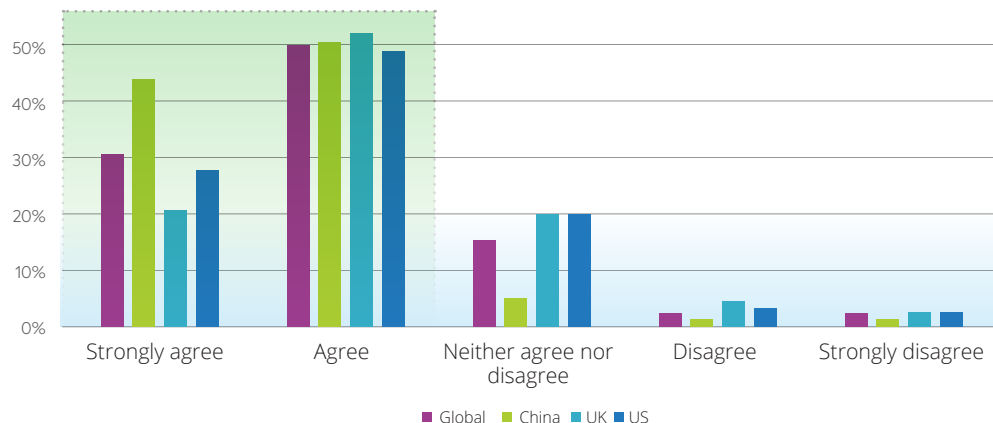
Employees' View

As EX takes primacy, it is time organizations move beyond cost considerations.



of global employees agree or strongly agree that advanced monitors (higher resolution, better ergonomics and color) **will improve overall working experience.**

Q: Do you agree having a more advanced monitor at work will improve your overall working experience?



IT and Business Decision Makers' View

Management do not see a need to buy better monitors.



When IT decision makers were asked about their organization's approach to providing monitors to employees:



provide outdated or the cheapest monitors available.



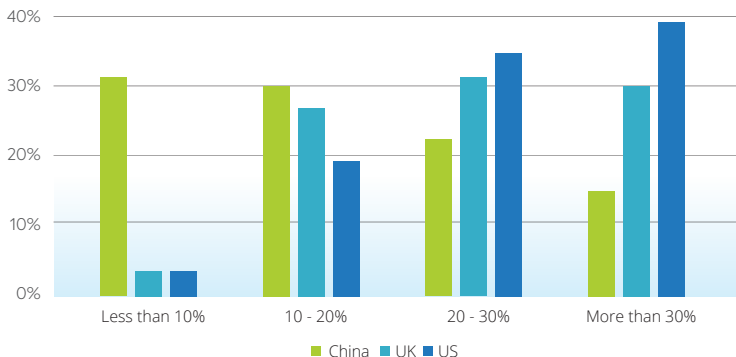
do not consider monitors important for FOW.

Rise of younger generation workforce placing new demands on workspace designs and policies



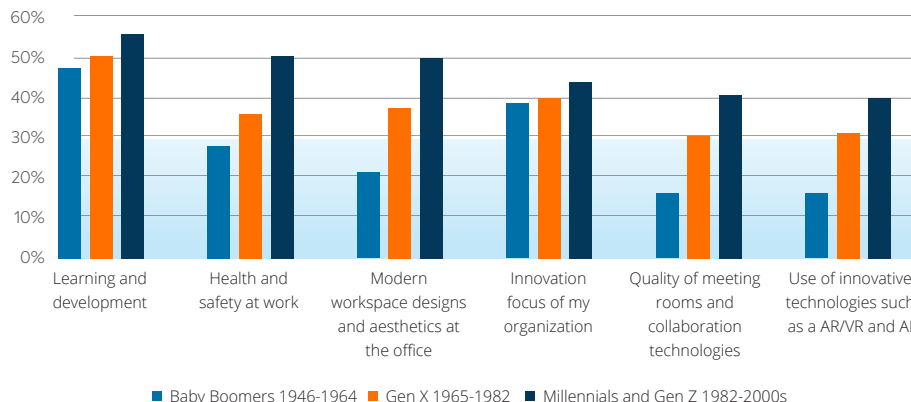
One-third of organizations surveyed globally expect millennials and Gen Z to account for over 30% of their future hires in the next 1-2 years.

Percentage of millennials and Gen Z in the organization's workforce in the next 1-2 years



Millennials and Gen Z professionals tend to align their career with a higher purpose. Workspace designs, learning and development, health and safety at work are among the key factors that keep them motivated at work.

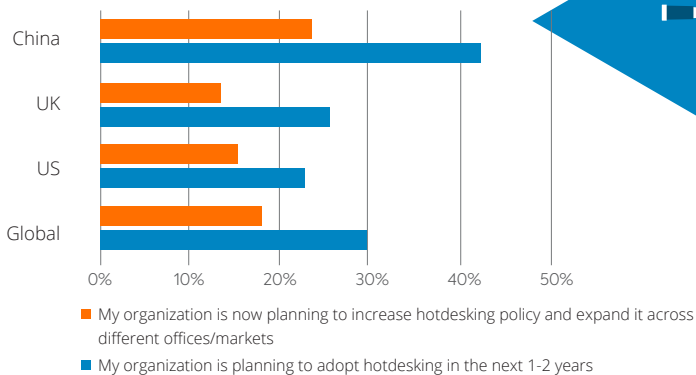
Top 6 factors that motivate employees Millennials, Gen Z vs. other generations



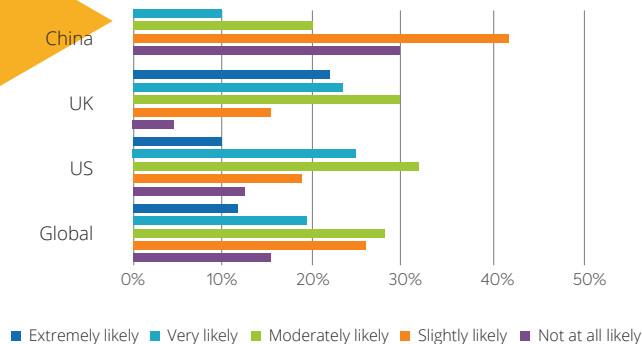
Hotdesking is evolving as a new workspace trend, empowering workforces or the workforce with desired mobility and technologies to be more productive

Views are divergent on hotdesking. While IT decision makers are in no hurry to adopt hotdesking, employees are looking forward to it.

Employees' View



IT and Business Decision Makers' View



Employees vs. ITDMs: Divergent views on hotdesking

65% of employees in China think their organizations are either planning to adopt or expand the use of hotdesking in the next 1-2 years. However, only 9% of IT decision makers said they are very likely to consider hotdesking spaces.

CASE EXAMPLE:

Large global corporations, such as HSBC, Accenture, Microsoft, GE and Boeing, have joined the hotdesking trend.

In the war for millennial talent, hardware policies will need to be updated to meet the needs of the changing demographic workforce

Less than one-quarter of organizations globally ensure their hardware policies are regularly updated to cover the needs of their younger generation workers.



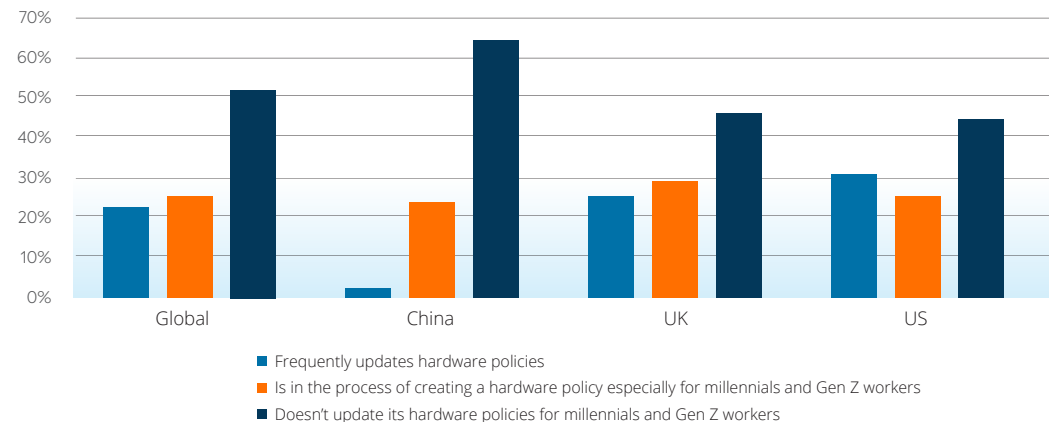
Only **22%** of organizations globally frequently update their hardware policies to accommodate millennials and Gen Z workers by offering modern devices with wider choices and frequent refresh.

CASE EXAMPLE:

ADP, a US-based HR management software provider, has developed a workplace technology systems especially for millennials, to increase collaboration across all employee levels.



of global organizations do not update their hardware policies for millennials and Gen Z workers. More awareness is needed in China where 65% of organizations surveyed do not ensure their device policies stay up to date.



Tech refresh policies failing to keep pace with monitor requirements of the new generation workforce

Though a role-based policy is the need of the hour, organizations are still taking a tactical approach to their monitor cycles.

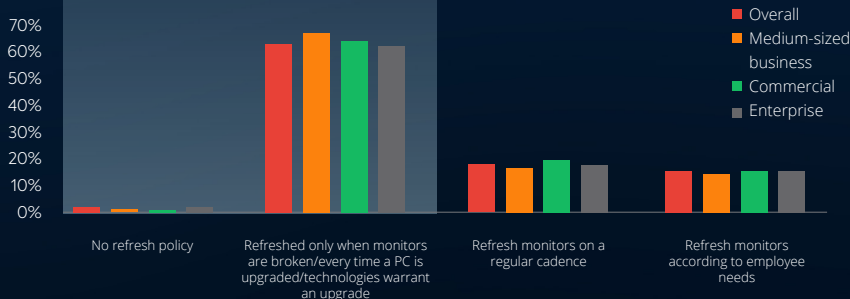
From the employees' view, 63% of organizations are only refreshing monitors when broken, every time a PC is upgraded or when technologies warrant an upgrade.

Employees' View

Organization's approach toward refreshing monitors – Country split



Organization's approach toward refreshing monitors – Company size

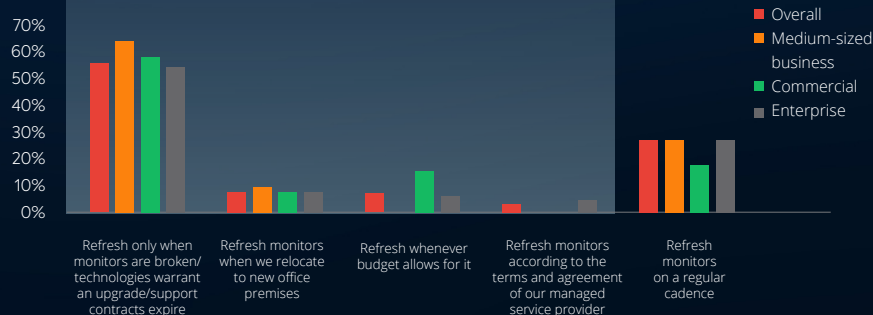


IT and Business Decision Makers' View

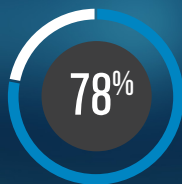
Organization's approach toward refreshing monitors – Country split



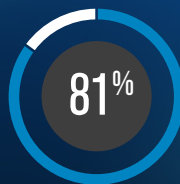
Organization's approach toward refreshing monitors – Company size



Monitor provisioning is not in line with employees' expectations



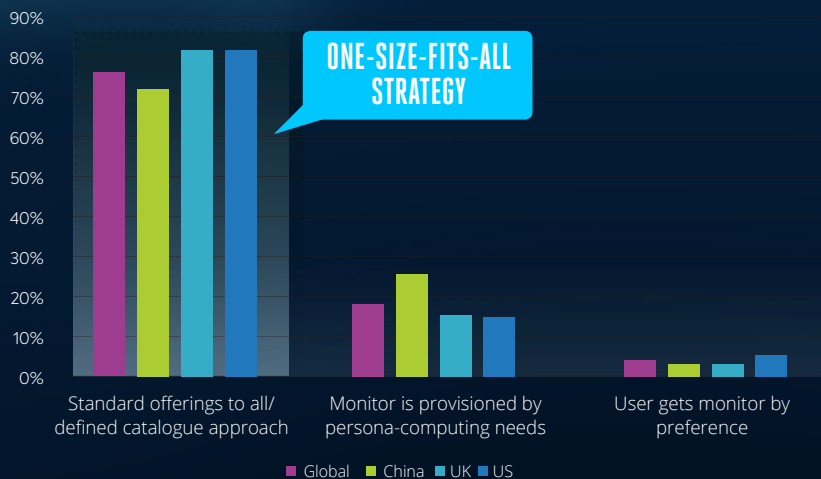
of global organizations provision monitors as a standard offering to all – one-size-fits-all strategy is still the norm.



of employees surveyed globally want to have a say in the allotment of their monitors.

More respondents in China (94%), compared to their UK (76%) and US (73%) counterparts wish to be consulted.

IT and Business Decision Makers' View



As employee experience takes priority, ensuring that employees have the right tools to do their jobs is important. Forget the one-size-fits-all approach, and allocate monitors based on job role and function.

Employees' View by Region



China



UK



US

Employees' View by Company Size



Medium-sized Business



Commercial



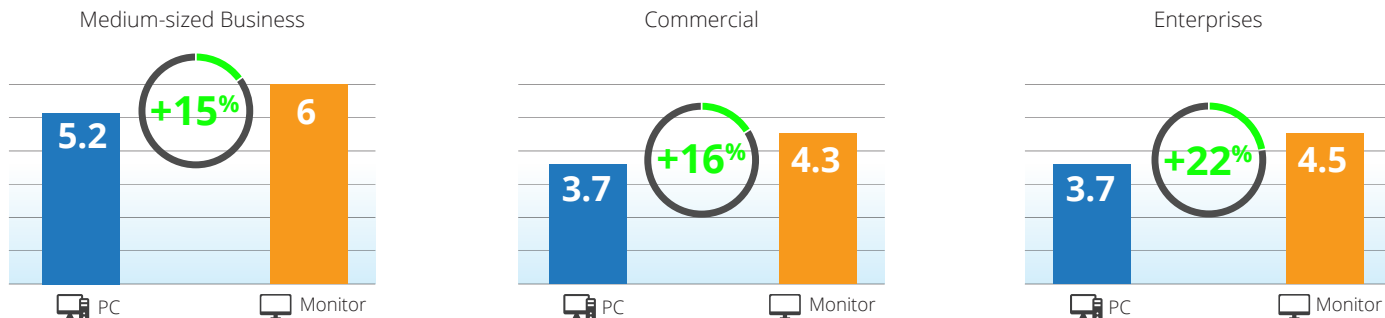
Enterprise

Monitor refresh cycles are longer than their PC counterparts across regions and company sizes

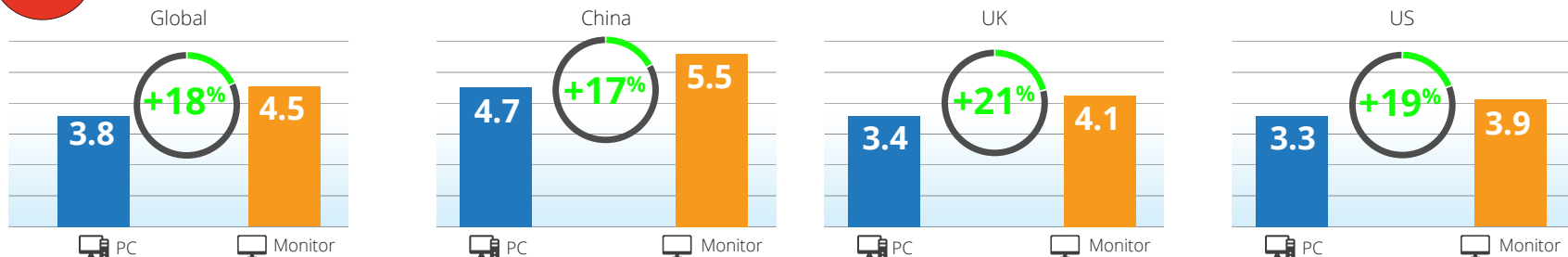


PC Vs. Monitors Average Lifecycle (Years)

Medium-sized businesses **keep their monitors for an average of 6 years before refreshing**, much longer than commercial and enterprises.



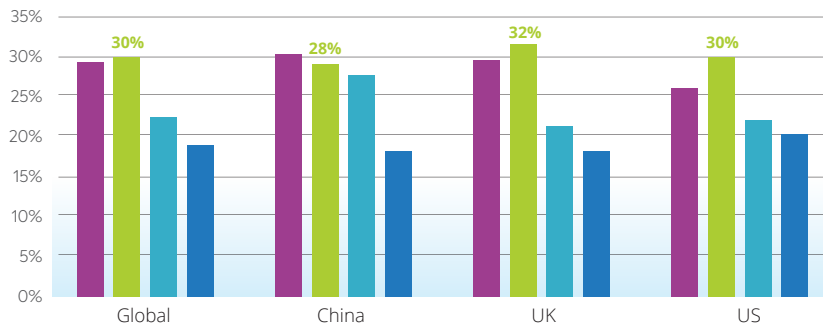
Organizations in **China keep their monitors for an average of 5.5 years before refreshing**, much longer than UK and US.



Tactical approach to monitor provisioning impacts employee motivation and productivity

Employees' View

Lack of ergonomics is a top rated factor for negatively impacting productivity at work



- Lack of advanced front of screen options (lack of advanced display technologies, i.e., in-plane switching [IPS] panel, screen resolutions, adequate color/contrast)
- Lack of ergonomics (lack of adjustability like height, pivot, swivel, tilt, etc.)
- Lack of advanced design and usability (lack of curved screen, takes too much space, limited ports, lacks USB-C integration, etc.)
- Lack of advanced features (no blue light emission reduction, lacks integration with smart assistant programs, etc.)

Top 3 policies that negatively impact employee motivation and productivity at work as rated by employees



China



UK



US

01

Slow devices or devices not meeting work requirements

30%

34%

32%

02

Obsolete/Outdated devices – not refreshed for many years

16%

21%

21%

03

Lack of IT policies to provide devices of employee choice

14%

15%

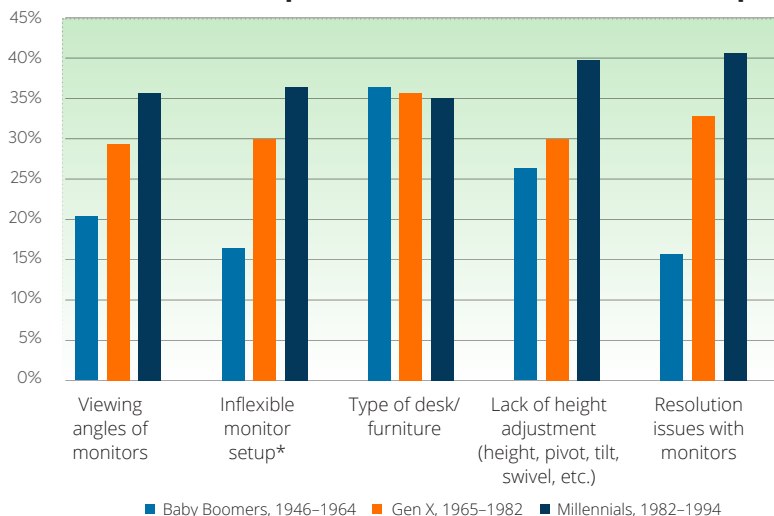
15%

Devices not meeting employee expectations are the leading productivity and motivation drag.

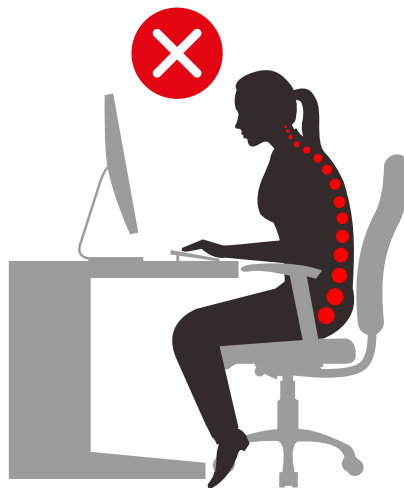
Organizations are not considering better ergonomics of displays to ensure employees' well-being

Proper workspace ergonomics play a key role in ensuring employee wellness and organizational compliance with standard workplace safety and fair employment practices.

Lack of height adjustment, poor resolution and inflexible monitor set-up are the top-rated factors for health- and posture-related issues



*An inflexible monitor set-up is generally a desktop that is supported by a rigid stand, which takes large desk space and lacks mounting option.



Organizations should consider workspace ergonomics as part of their future workspace model to deliver a flexible, intelligent, collaborative virtual/physical work environment and improved employee experience and productivity.

CASE EXAMPLE:



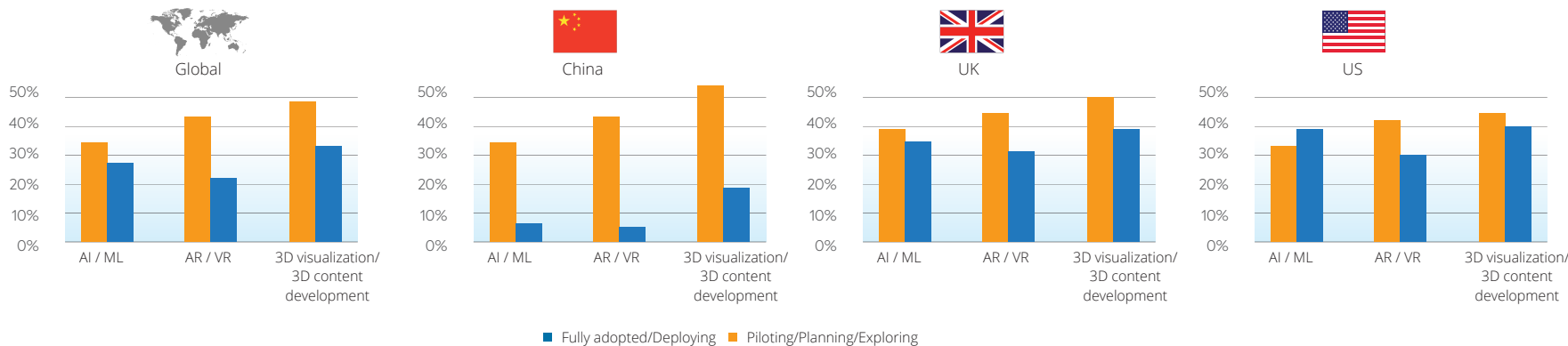
The European Pillar of Social Rights and the modernization of the Occupational Safety and Health Act of 1970 in the US focus on protecting workers' health and safety at work and longer participation of the aging workforce.

Sources:
Dell Monitor FOW Employee Survey, 2019; N = 1,242 (Baby Boomers = 304, Gen X = 553, Millennials = 385)
Education & Labor Committee, Chairman Bobby Scott, Press Release (February 2019), On Ninth Anniversary of Kleen Energy Explosion, Congressman Courtney Reintroduces the Protecting American Workers Act

Adoption of immersive technologies will necessitate the need for advanced monitors

Advanced monitors are designed to support new emerging workloads, especially data-centric and design tasks.

Adoption of immersive technologies – AI/machine learning (ML), AR/VR, 3D visualization



Workers with advanced monitors will be able to see more, better visualize the data, share insights from complex data, and better collaborate with the external ecosystem, such as content developers, advertisers, and device makers. For example, Halliburton's Landmark, which provides software solutions to the oil and gas sector, utilizes immersive AR and VR technologies as well as interactive high-definition displays to visualize complex 3D models of subsurface data critical for oil-well planning.

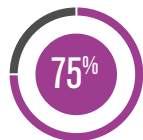
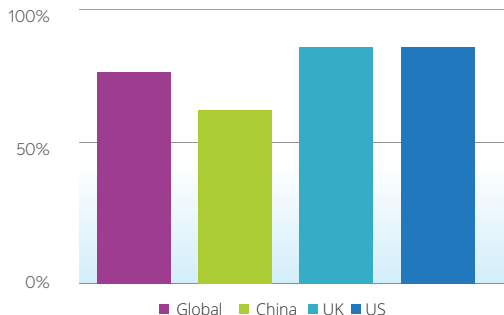
China organizations, which significantly lag their UK and US counterparts in terms of immersive technology adoption, are missing out on the opportunity to drive business innovation and sustained competitive advantage.

Monitors will remain the primary gateway to create and consume digital content

A strategy that focuses on enhancing content creation and data visualization capabilities can help deliver better experiences and higher productivity.

IT and Business Decision Makers' View

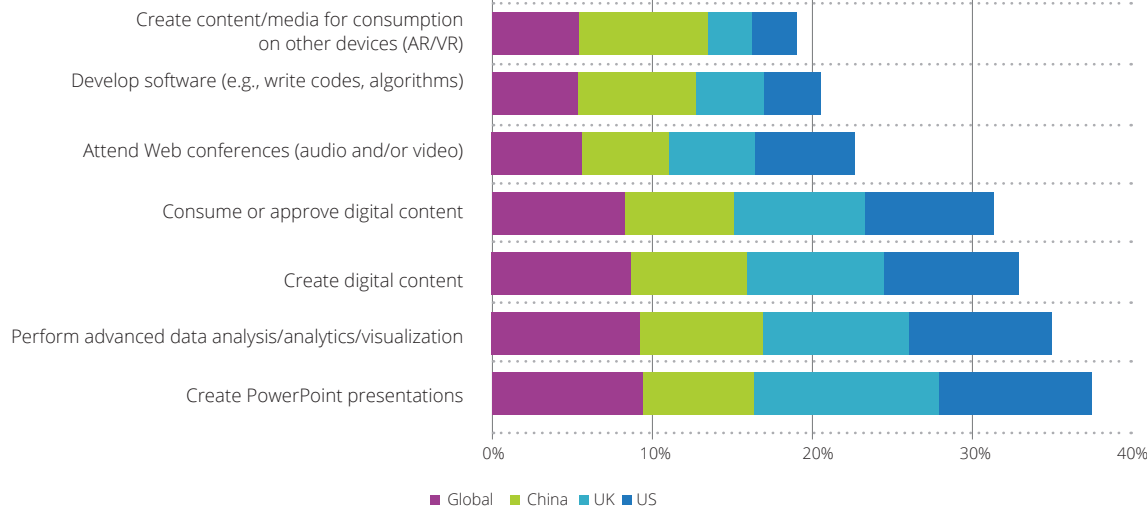
Importance of enhancing content creation and data visualization capabilities for future success



75% of organizations agree that enhancing their data visualization capabilities is critical for future success.

Employees' View

Types of tasks performed on monitors



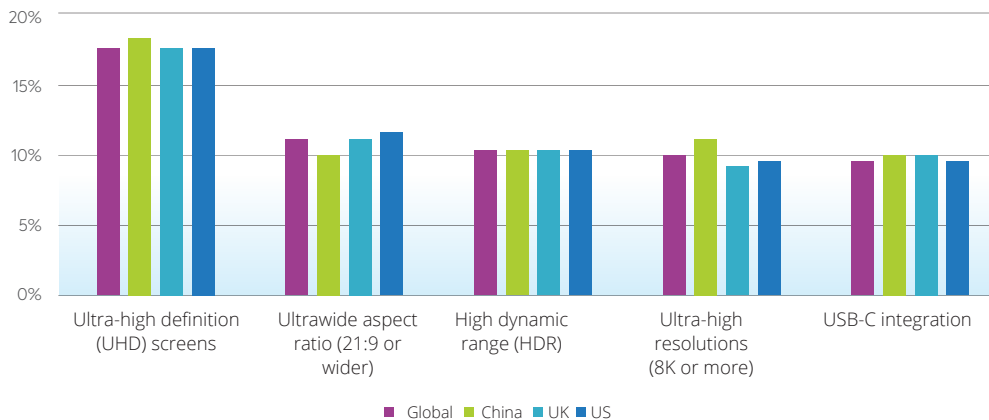
- Growth in immersive technologies will drive the demand for high-performance monitors with higher resolution, larger screen sizes and newer form factors to support the richer content and new workloads for a variety of data-centric and design tasks.
- Monitors also have a strong bearing on helping employees drive productivity. Over 80% of employees think that monitors with bigger screens help drive productivity at work.

Employees, IT and business decision makers agree high-screen resolution is their top monitor purchase decision factor

To cater to the new demands at work, the display market has also experienced significant innovation in the last few years in terms of high-definition screens, richer resolution, and interactive capabilities.

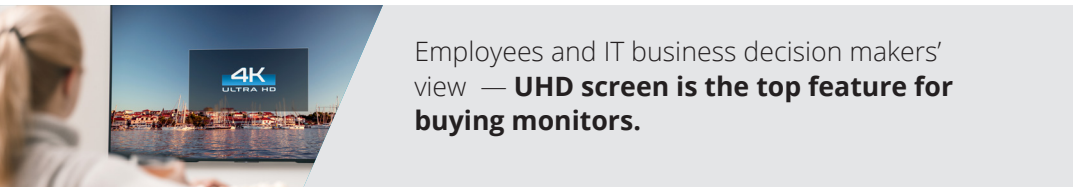
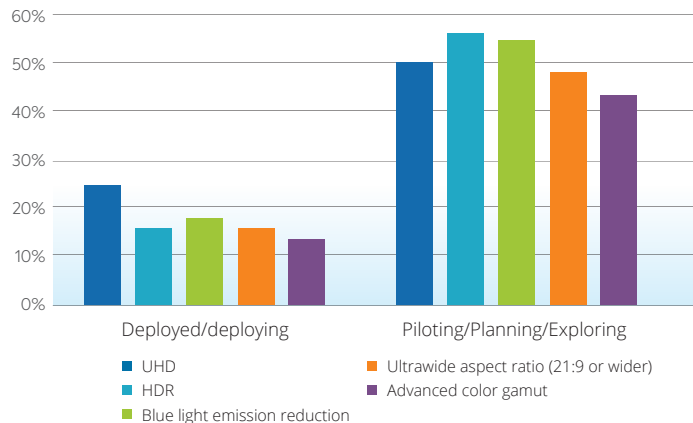
Employees' View

Important features for buying a monitor



IT and Business Decision Makers' View

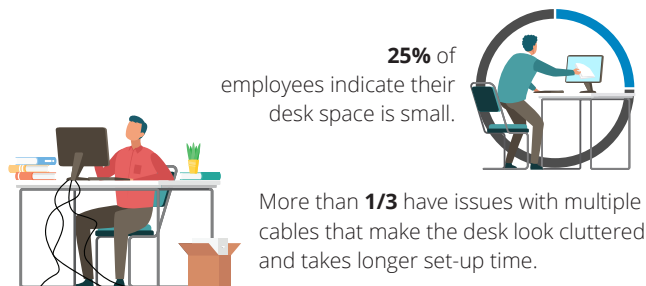
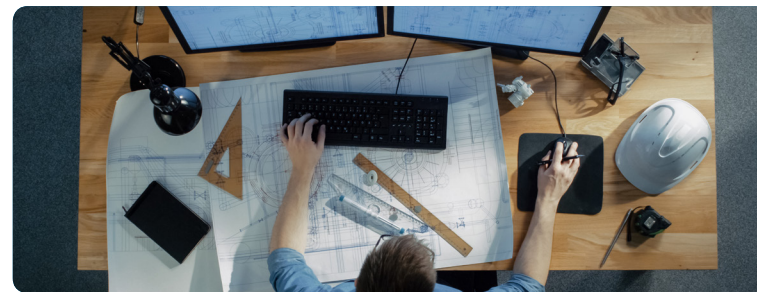
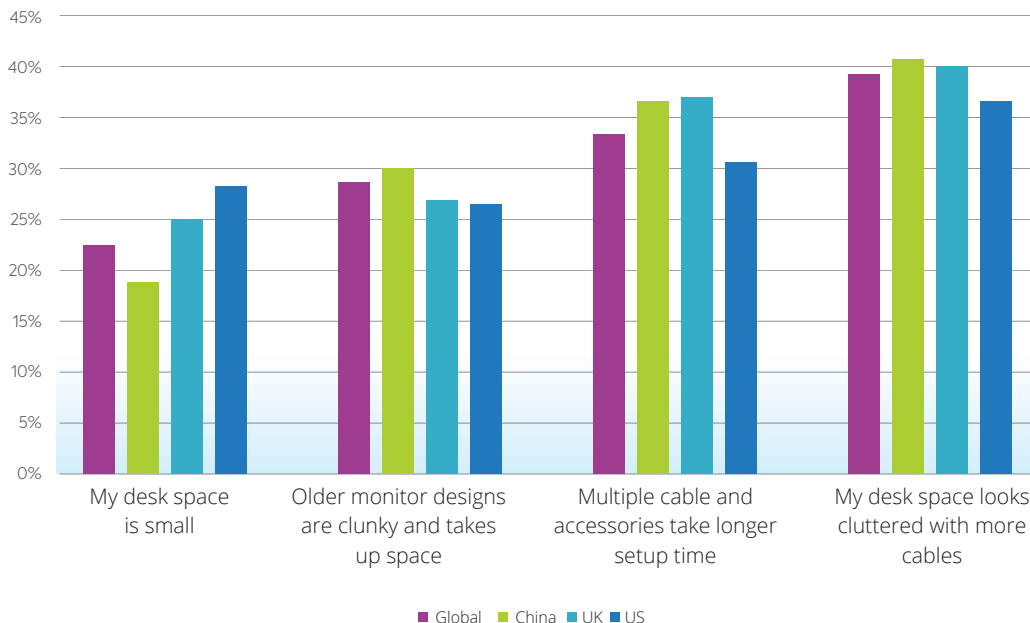
Interest in new advanced monitor display features



of IT decision makers are running pilots, planning or exploring monitors with advanced features to support a variety of emerging data-centric and design tasks.

The office desk quagmire – cables and clunky monitors add to desk clutter

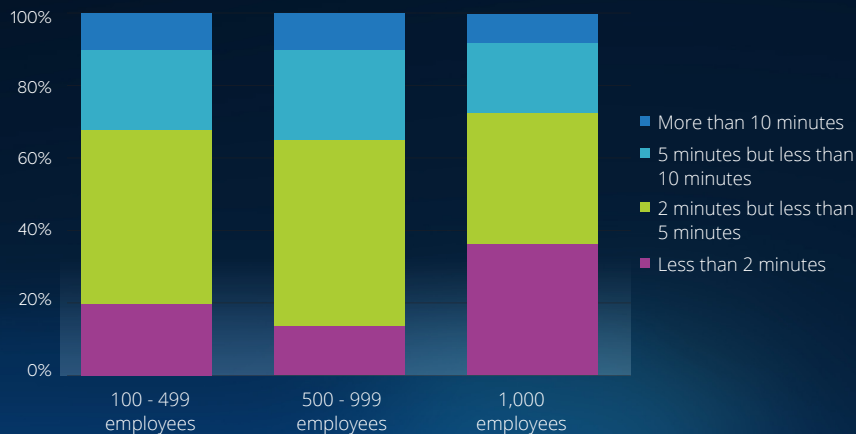
Employees' View on desk space, monitor designs and multiple cables



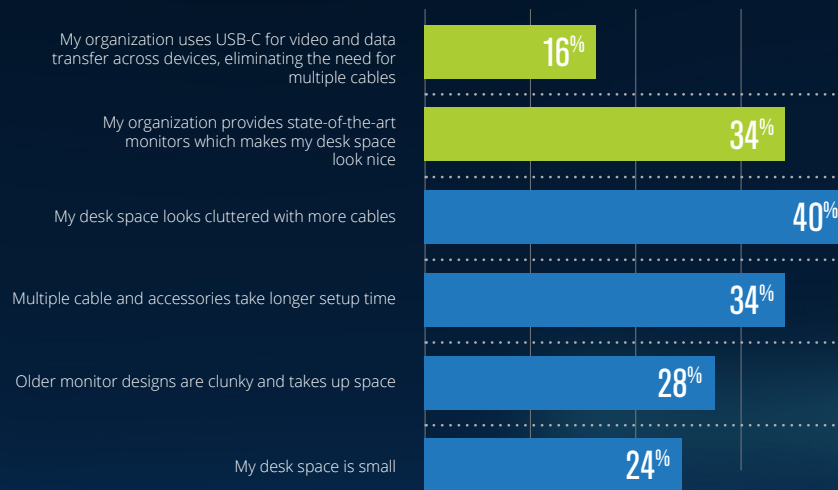
As the war for attracting and retaining the best talent intensifies, organizations need to explore various options to create better working experience for employees, which includes better workspace designs, offering choice of devices and utilizing digital technologies to improve overall EX.

Impact of desk clutter: Employees on average lose 20 hours a year due to multiple cables and inefficient connectivity options

Time spent/wasted connecting monitor and peripherals to the computer each day



Factors that apply to work desk/space at work



5mins/day
20hrs
per year

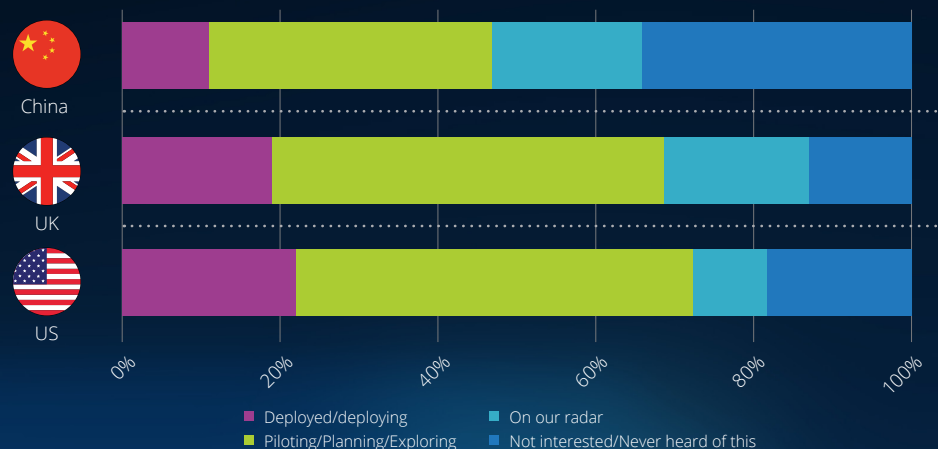
On average, employees **waste about 5 minutes a day** just connecting peripherals to PCs.

Multiple cables and small and cluttered desk spaces can increase time spent on connecting monitors and peripherals.

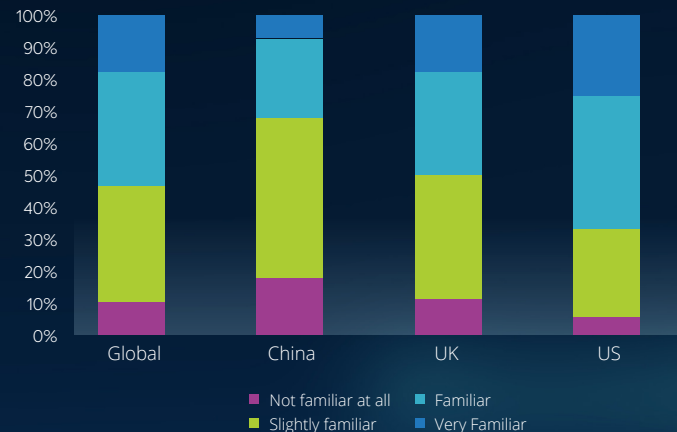
USB-C can help reduce clutter and enhance employee working experience

Deployments are underway, but regional differences remain.

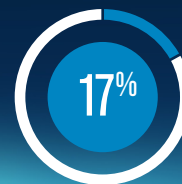
Organizational interest in USB-C monitors



Familiarity with USB-C benefits

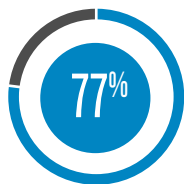


- The USB-C transition is ongoing with **China lagging UK and the US** in terms of organizational interest in USB-C monitors.
- Not only does USB-C help organizations simplify accessories and cabling, it also manages the clumsy input/output transitions.



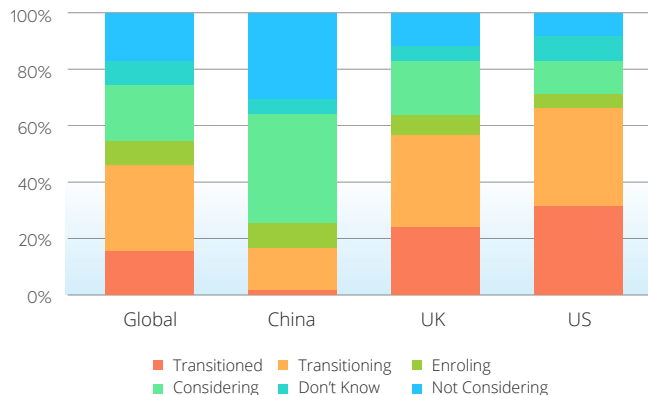
of IT and business decision makers in China are completely unfamiliar with benefits of USB-C, higher than their US and UK counterparts. More education is needed to increase awareness of USB-C and its benefits in China.

Increasing employee choice in device and monitors will help drive an engaged workforce and benefits of device standardization



of global organizations have transitioned, are transitioning or are considering device as a service (DaaS) to offer choices to their employees. China is slower in transitioning to DaaS, as compared to the US and UK.

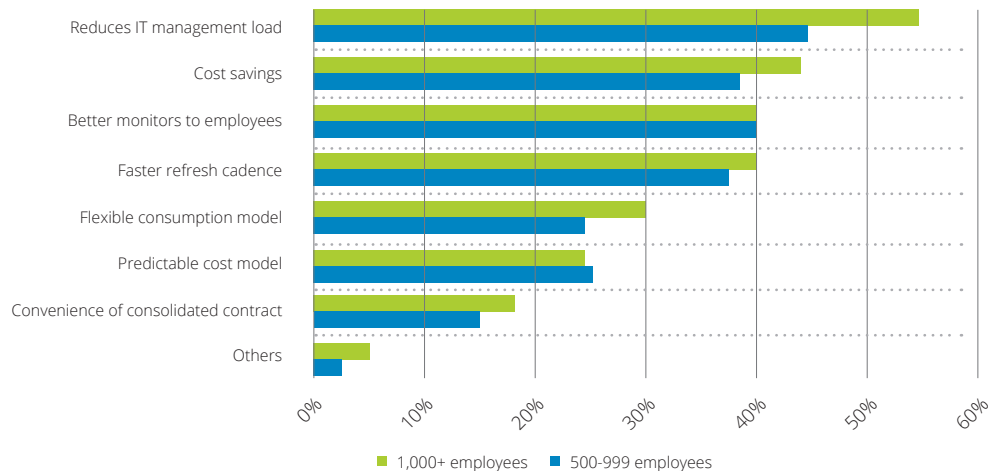
DaaS category – Country split



Greater awareness is needed to help organizations realize the benefits of DaaS, especially around providing employees with the device of their choice to help them do their work effectively.

IT and Business Decision Makers' View

Top benefits of including monitors in DaaS agreement



The top 3 benefits of buying monitors on a DaaS model are reduced IT workload, cost savings, and better monitors for employees.



Essential guidance

Supporting a future workforce will necessitate organizations to pay close attention to EX and to critically evaluate what role monitors play in delivering superior experiences for their employees.

Below are IDC's recommendations for IT decision makers and LoB heads as they craft their monitor strategy for the future workforce:



Monitors should be an integral part of FOW strategies.

Consider upgrading or provisioning new advanced monitors as part of workspace modernization, digitalization and productivity enhancement initiatives.



Ensure workers have the right tools to do their job.

Adopt a more personalized approach to computing by offering employees their device of choice or based on working conditions to improve productivity and efficiency.



Empower the workforce with the latest technologies.

Invest in high-performance monitors that can keep pace with the latest technologies such as AR/VR, AI and ML, and handle the new workloads for variety of data-centric, visualization and design tasks.



Embrace USB-C to enhance collaboration and productivity.

USB-C can help declutter desk space and offer a standard solution for content sharing across diverse device types, without multiple cables.



Include monitors in as-a-service agreements.

Give employees their choice in devices and move away from inflexible standardization policies.



China: Invest in EX monitoring.

73% of organizations in China do not have any metrics to track EX. They would do well to attract and retain the best talent by investing in an effective monitoring system to improve employee engagement and performance.



US: Update hardware policies.

More than 40% of US organizations do not update their policies. This should be part of any talent recruitment and retention strategy for new millennial and Gen Z hires.



UK: Equip employees with tools according to job role and function.

81% of UK organizations provision monitors as a standard offering to all. Empower employees with the right devices to maximize productivity.



Medium-sized businesses: Refresh monitors faster for better EX.

Keeping monitors for 6 years before refreshing is too long. Shorter refresh cycles will help keep pace with workforce requirements for modern technologies and help increase employee productivity and motivation.

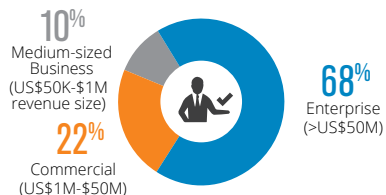
Appendix

The survey included 304 IT and business decision makers as well as 1,252 employees who use monitors for work across the US, the UK and China markets. Organizations with global annual revenue/sales turnover of US\$50,000 and above were considered for the survey.

Employee Survey by Country

	China	415
	UK	419
	US	418
	Total	1,252

Employee Survey by Revenue



Employee Survey by Age Group



Industries



Banking, financial services and insurance (BFSI)



Technology (IT/telecom/software/hardware, etc.)



Retail



Manufacturing



Media and entertainment



Engineering



Healthcare



Energy

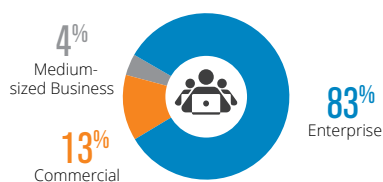


Education

IT and Business Decision Maker Survey by Country

	China	100
	UK	104
	US	100
	Total	304

IT and Business Decision Maker Survey by Revenue



IT and Business Decision Maker Survey by Persona

