EMPLOYEE DEVICES AND THE HYBRID WORKFORCE

A Survey of IT Device Managers

October 2021

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INTRODUCTION

When employees were sent home en masse at the beginning of the Covid pandemic, IT teams were forced to quickly adapt to a dramatic increase in remote work. With many employees advocating to stay remote – or to move to a hybrid model when they are in the office part-time - IT teams must chart a path for managing the devices both in the office and remotely.

This survey examines trends and endeavors to answer important questions including:

- **Is hybrid work a temporary blip or the model for the future?**

- **How does the hybrid workplace influence the employee device landscape?**

- **Do Apple devices have any advantages in a hybrid world?**

- **Is IT confident in remote and hybrid device management?**

KEY FINDINGS

The hybrid workforce is expanding dramatically

- 94% have hybrid workers
- 70% more than doubled the number of remote or hybrid workers in past two years
- 87% say that the good of hybrid work outweighs the bad
- 97% agree the hybrid workforce is here to stay

Apple device adoption increases as the hybrid workforce grows

- 76% report increase in use of Apple devices in past two years
- 63% say use of Mac notebook computers increased in past two years
- 53% cite an increase in requests for Apple devices among employees
- Many more IT stakeholders reported an increase in requests for Apple devices than reported an increase in requests for other types of devices (42% vs. 11%)

Apple devices have advantages for remote management

- 95% face challenges managing remote devices
- 48% believe Apple devices have advantages over other types of devices for hybrid workers
- 54% of IT device management stakeholders and 56% of IT leadership have increased confidence in their ability to remotely manage Apple devices in the past two years
- 75% agree that Apple devices have lower overall Total Cost of Ownership (TCO)

DETAILED FINDINGS

THE HYBRID WORKFORCE IS EXPANDING DRAMATICALLY

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# THE VAST MAJORITY OF COMPANIES (94%) HAVE HYBRID WORKERS

A "hybrid worker" is any employee who is enabled to work both on-site and remote. This includes employees who work from home on occasion, employees who travel to meet clients but also have an office base, as well as any other combination of on-site and remote work.

Does your company have any hybrid workers?
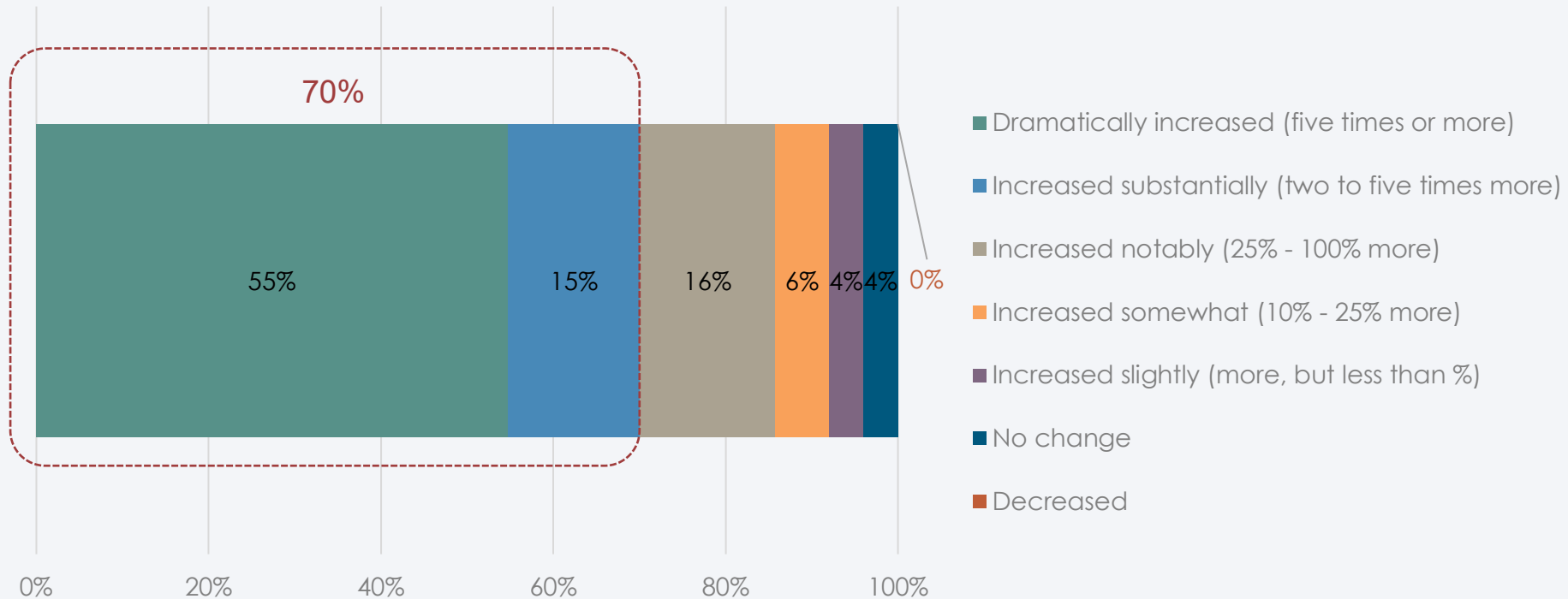

No 6%

Yes 94%
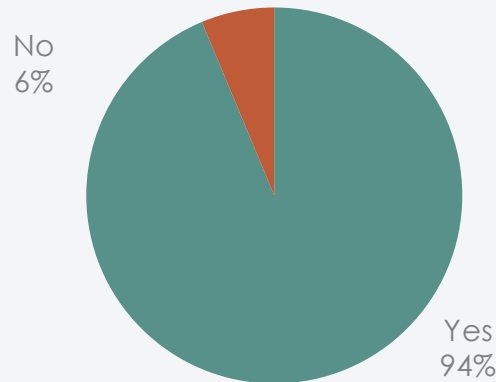
ALMOST HALF (44%) OF TODAY'S WORKERS ARE HYBRID AND 4 IN 5 (80%) WORK REMOTELY

To the best of your knowledge, what percentage of your company's workforce is each of the following? Enter a number for each option, with the total adding up to 100%.

Only on-site
20%

Hybrid (mix of onsite and remote)
44%

Only remote
36%
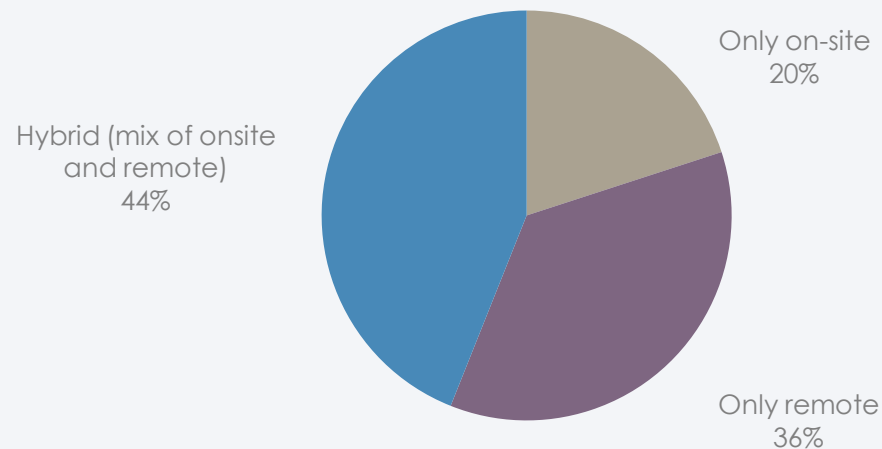
70% OF COMPANIES MORE THAN DOUBLED THE NUMBER OF REMOTE OR HYBRID WORKERS IN PAST TWO YEARS

In the past two years, how has the number of remote or hybrid workers changed at your company? Choose the one answer that most closely applies.

70%

55% 15% 16% 6% 4% 4% 0%

- Dramatically increased (five times or more)
- Increased substantially (two to five times more)
- Increased notably (25% - 100% more)
- Increased somewhat (10% - 25% more)
- Increased slightly (more, but less than %)
- No change
- Decreased

0% 20% 40% 60% 80% 100%

n = have hybrid workers

DEFINITION GIVEN TO SURVEY PARTICIPANTS
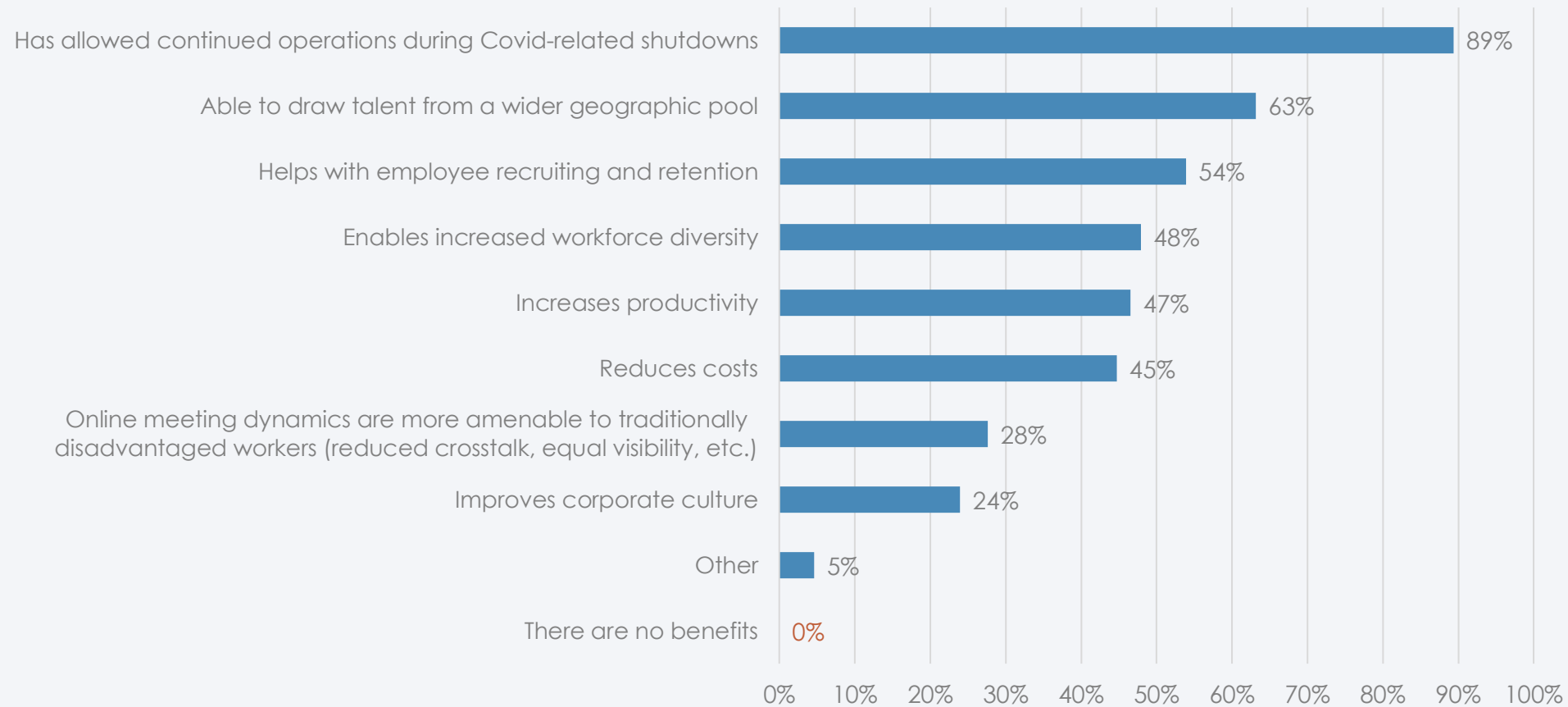
"Hybrid Workforce"

DEFINITION: A **"hybrid workforce"** is one where there are employees working on-site and remotely. A hybrid workforce may include hybrid workers who work in both environments, but may also be a mix of remote-only and on-site-only.
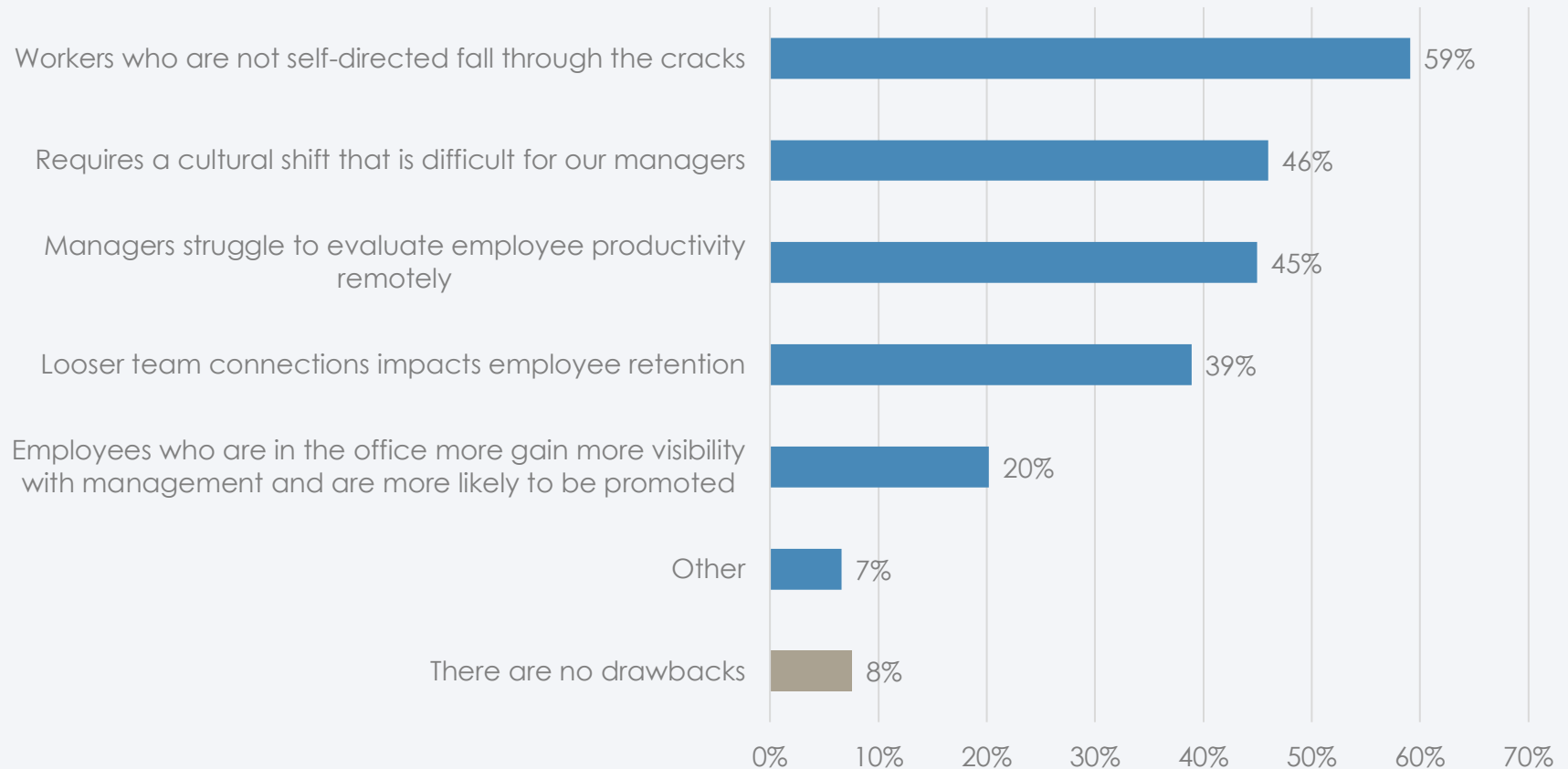
100% REPORT THAT THEIR COMPANY BENEFITS FROM HAVING A HYBRID WORKFORCE

How does your company BENEFIT from having a hybrid workforce?
Choose all that apply.

Benefit	Percentage
Has allowed continued operations during Covid-related shutdowns	89%
Able to draw talent from a wider geographic pool	63%
Helps with employee recruiting and retention	54%
Enables increased workforce diversity	48%
Increases productivity	47%
Reduces costs	45%
Online meeting dynamics are more amenable to traditionally disadvantaged workers (reduced crosstalk, equal visibility, etc.)	28%
Improves corporate culture	24%
Other	5%
There are no benefits	0%

9

Select Other ▸ Employees appreciate flexibility; Improved work/life balance; Lower carbon impact due to less commuting; Digital communication increases employee availability
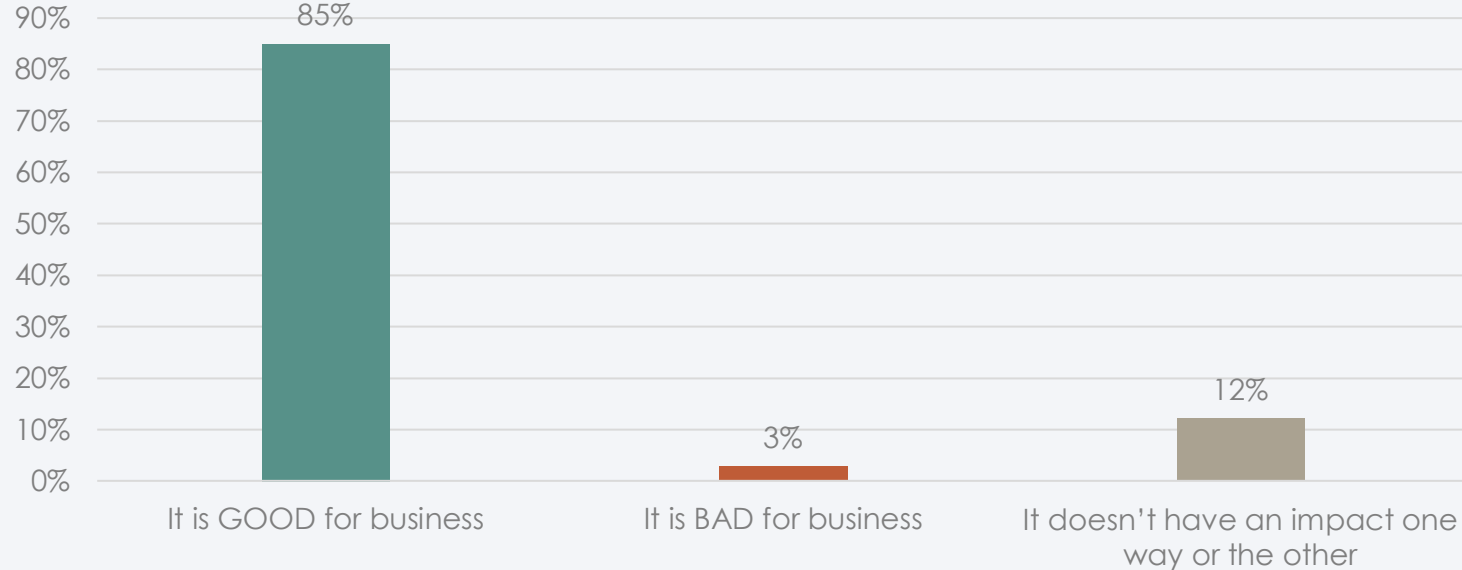
n = have a hybrid workforce

HOWEVER, MOST (92%) AGREE THERE IS ALSO DOWNSIDE TO HAVING A HYBRID WORKFORCE

**What are the DRAWBACKS of a hybrid workforce for your company?**
Choose all that apply.

Drawback	Percentage
Workers who are not self-directed fall through the cracks	59%
Requires a cultural shift that is difficult for our managers	46%
Managers struggle to evaluate employee productivity remotely	45%
Looser team connections impacts employee retention	39%
Employees who are in the office more gain more visibility with management and are more likely to be promoted	20%
Other	7%
There are no drawbacks	8%

Frequent Other
Company culture suffers
Team building, morale, and creativity is reduced
Less or worse communication

n = have a hybrid workforce

THE VAST MAJORITY (85%) REPORT THAT THE GOOD OF HYBRID WORK OUTWEIGHS THE BAD

What is your overall opinion of hybrid work for your company's business outcomes?

n = have a hybrid workforce

OVERWHELMING AGREEMENT (97%) THAT THE HYBRID WORKFORCE IS HERE TO STAY

"The hybrid workforce is here to stay."

Disagree
3%

Agree
97%

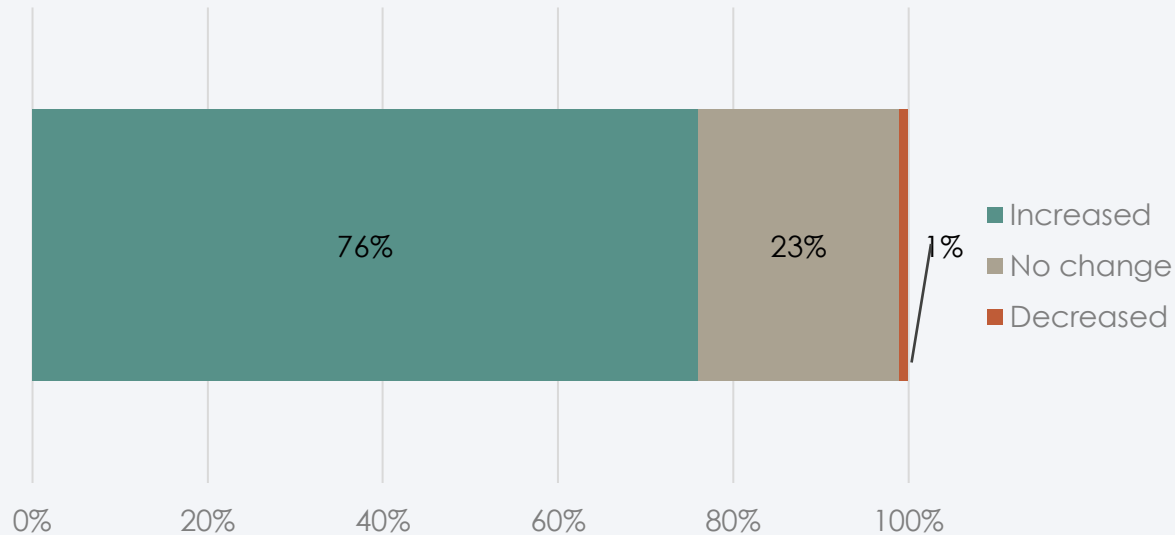*n = have a hybrid workforce*
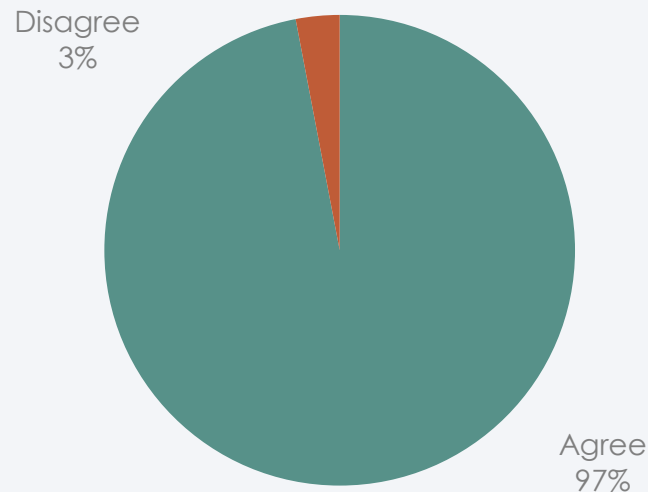
DETAILED FINDINGS

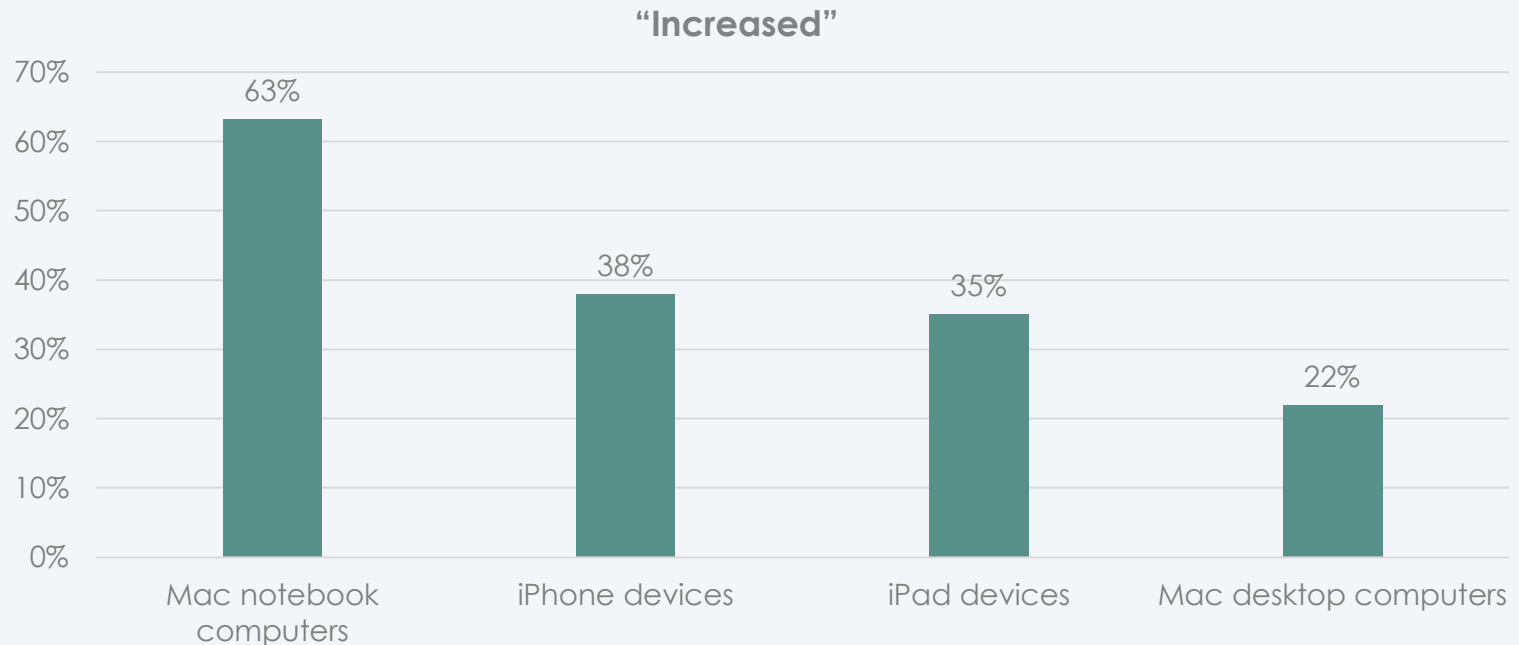## APPLE ADOPTION INCREASES AS THE HYBRID WORKFORCE GROWS

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THREE IN FOUR (76%) REPORT USE OF APPLE DEVICES HAS INCREASED IN PAST TWO YEARS

Change in use of employee Apple devices in past two years.

76%   23%   1%

Increased
No change
Decreased

0%   20%   40%   60%   80%   100%

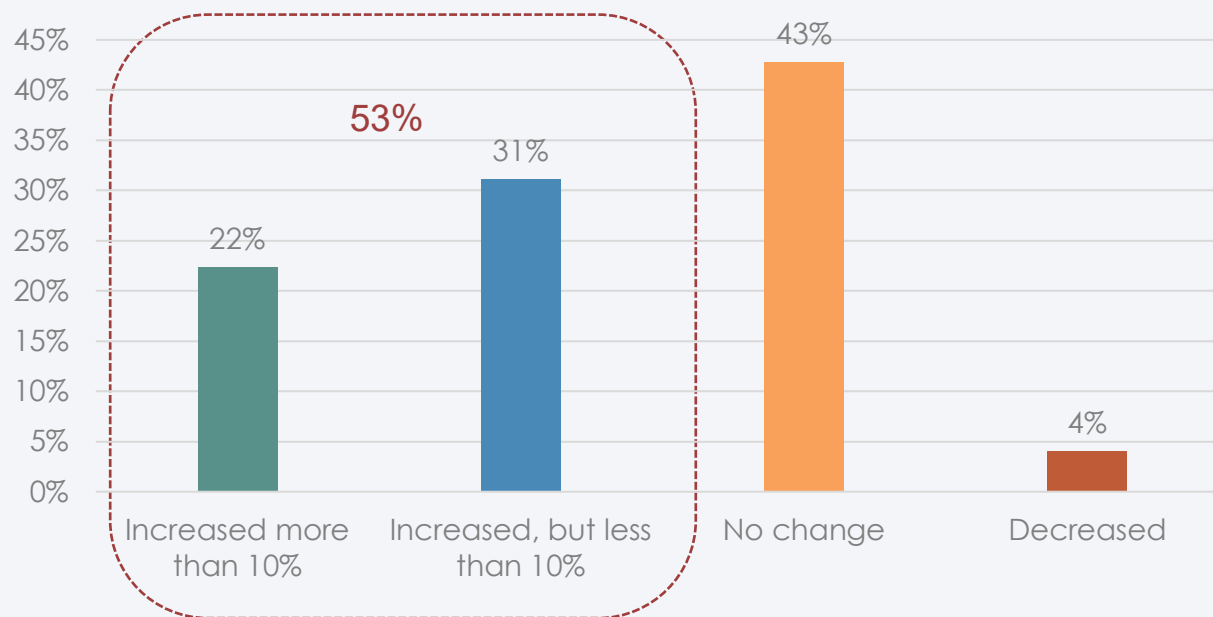*n = has employee Apple devices (98%)*

THE MAC NOTEBOOK IS THE APPLE DEVICE THAT INCREASED THE MOST IN PAST TWO YEARS

For each of the following types of Apples devices, please indicate how their level of use among your company's employees has changed in the past two years.

"Increased"

- Mac notebook computers: 63%
- iPhone devices: 38%
- iPad devices: 35%
- Mac desktop computers: 22%

n = has employee Apple devices (98%)

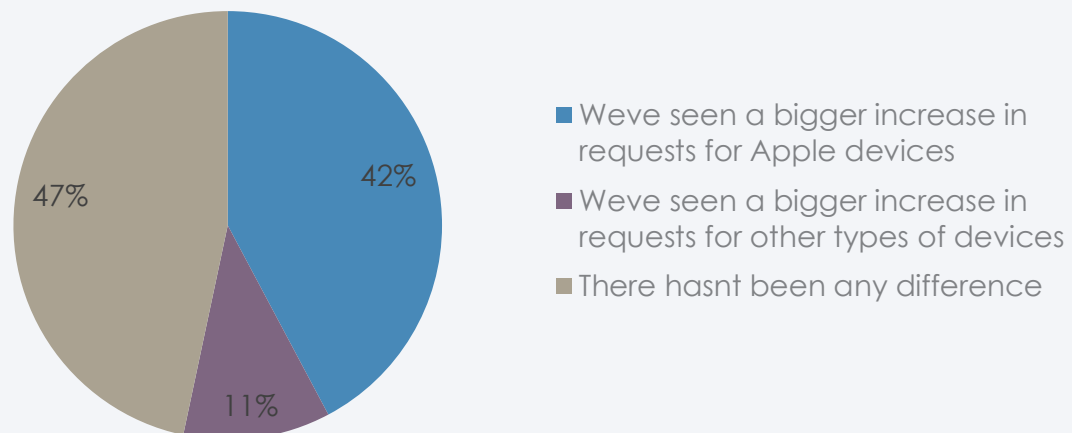# OVER HALF REPORT EMPLOYEE REQUESTS FOR APPLE DEVICES HAVE INCREASED IN PAST TWO YEARS

In the past two years, how have employee requests for Apple devices changed at your organization? Choose the one answer that most closely applies.

n = employees can request Apple devices (55%)

HIGHER INCREASE IN EMPLOYEE REQUESTS FOR APPLE DEVICES THAN ANY OTHER TYPES OF DEVICE

In the past two years, how has the overall number of requests for Apple devices changed compared to requests for other types of devices (i.e. Windows, Android)?

- 42%
- 47%
- 11%

■ Weve seen a bigger increase in requests for Apple devices

■ Weve seen a bigger increase in requests for other types of devices

■ There hasnt been any difference

n = employees can choose devices

MOST IT PROFESSIONALS WOULD RECOMMEND APPLE DEVICES

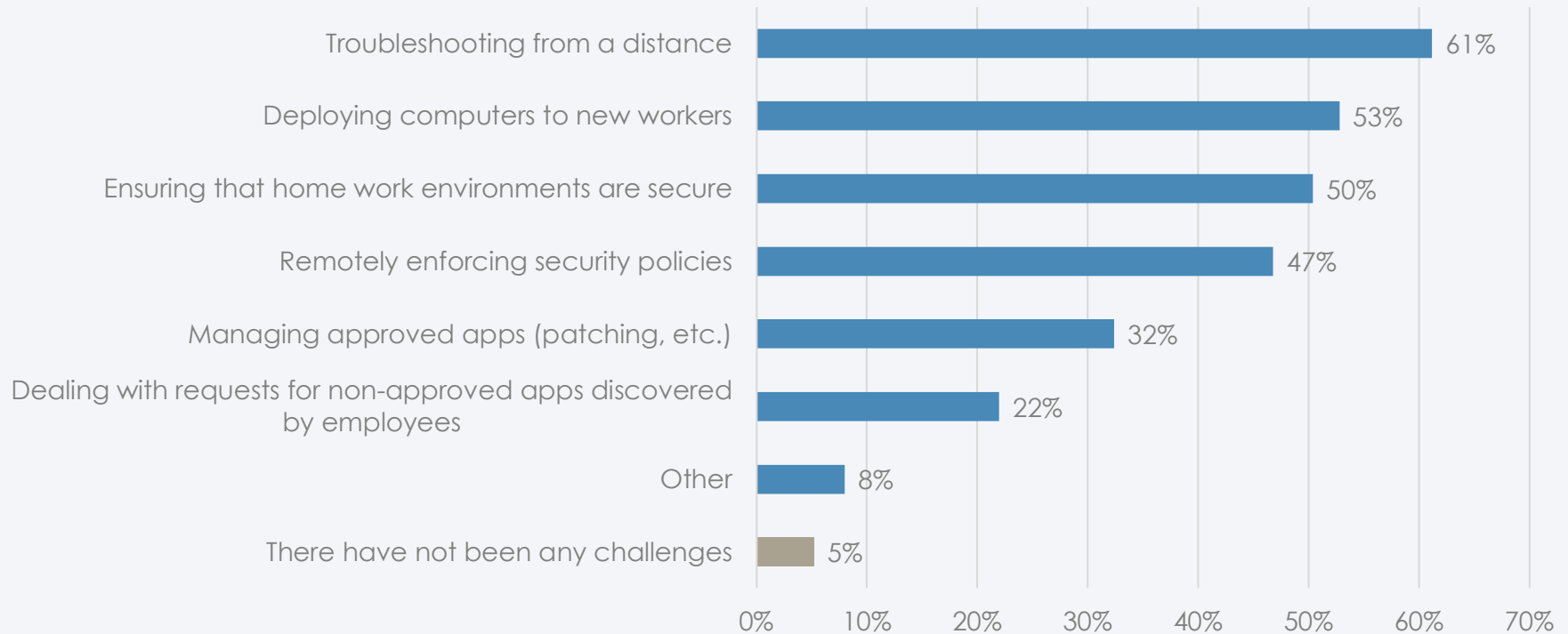**"I would recommend Apple devices for professional use to a colleague or peer."**

Disagree
16%

Agree
85%
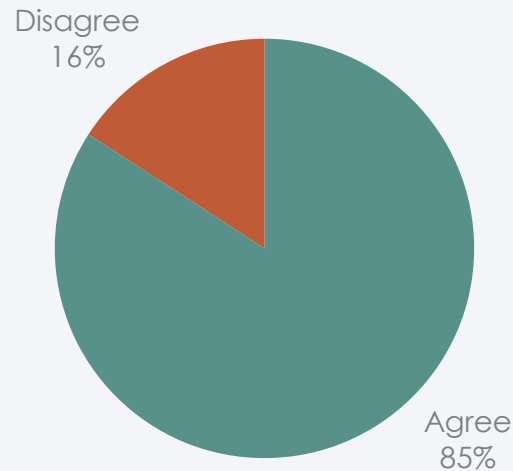
DETAILED FINDINGS

APPLE DEVICES HAVE ADVANTAGES FOR REMOTE MANAGEMENT

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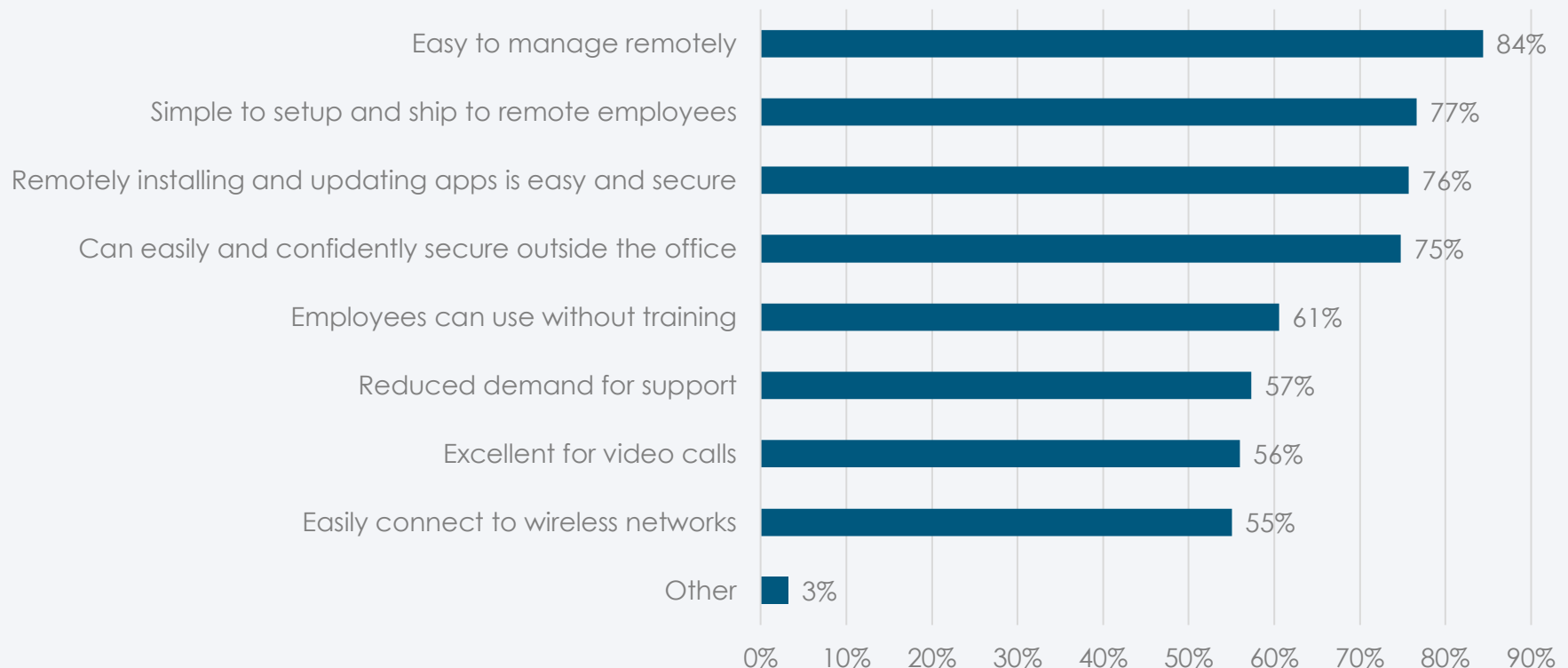
95% FACE CHALLENGES MANAGING REMOTE DEVICES

What have been the most challenging aspects of managing devices for remote and hybrid workers during the past two years? Choose all that apply.

Challenge	Percentage
Troubleshooting from a distance	61%
Deploying computers to new workers	53%
Ensuring that home work environments are secure	50%
Remotely enforcing security policies	47%
Managing approved apps (patching, etc.)	32%
Dealing with requests for non-approved apps discovered by employees	22%
Other	8%
There have not been any challenges	5%

Frequent Other — Network connectivity; Recovering equipment; User requests to come to their site; Blocked screen sharing

n = have remote or hybrid workers

EASE OF REMOTE MANAGEMENT MOST IMPORTANT CAPABILITY FOR REMOTE OR HYBRID WORKER DEVICES
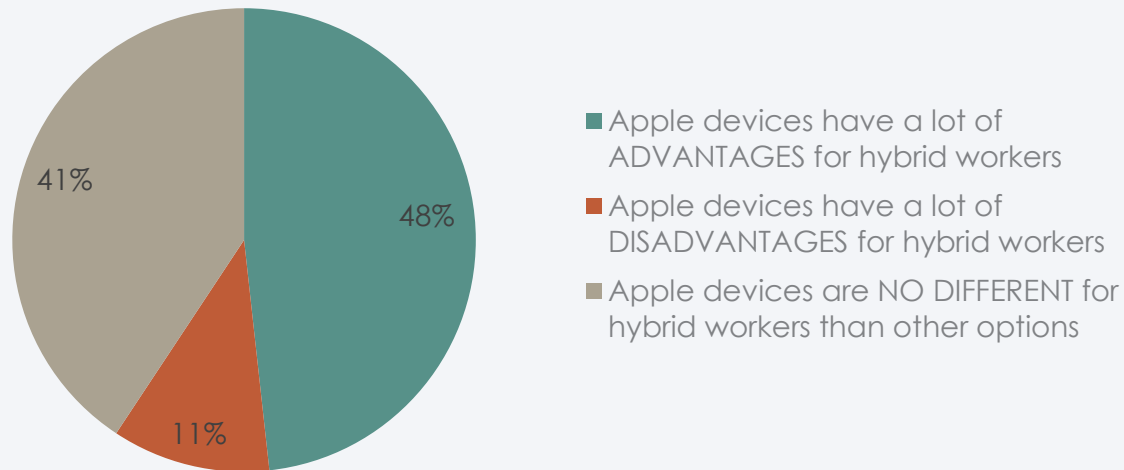
As someone who is responsible for employee devices, what capabilities are most important to you when you think of the ideal device for remote or hybrid workers?
Choose all that apply.

Capability	Percentage
Easy to manage remotely	84%
Simple to setup and ship to remote employees	77%
Remotely installing and updating apps is easy and secure	76%
Can easily and confidently secure outside the office	75%
Employees can use without training	61%
Reduced demand for support	57%
Excellent for video calls	56%
Easily connect to wireless networks	55%
Other	3%

Other: Laptop with larger screen to reduce costs for external monitors; Good audio; Touch screen capabilities; App deployment; Easy to replace; Portability

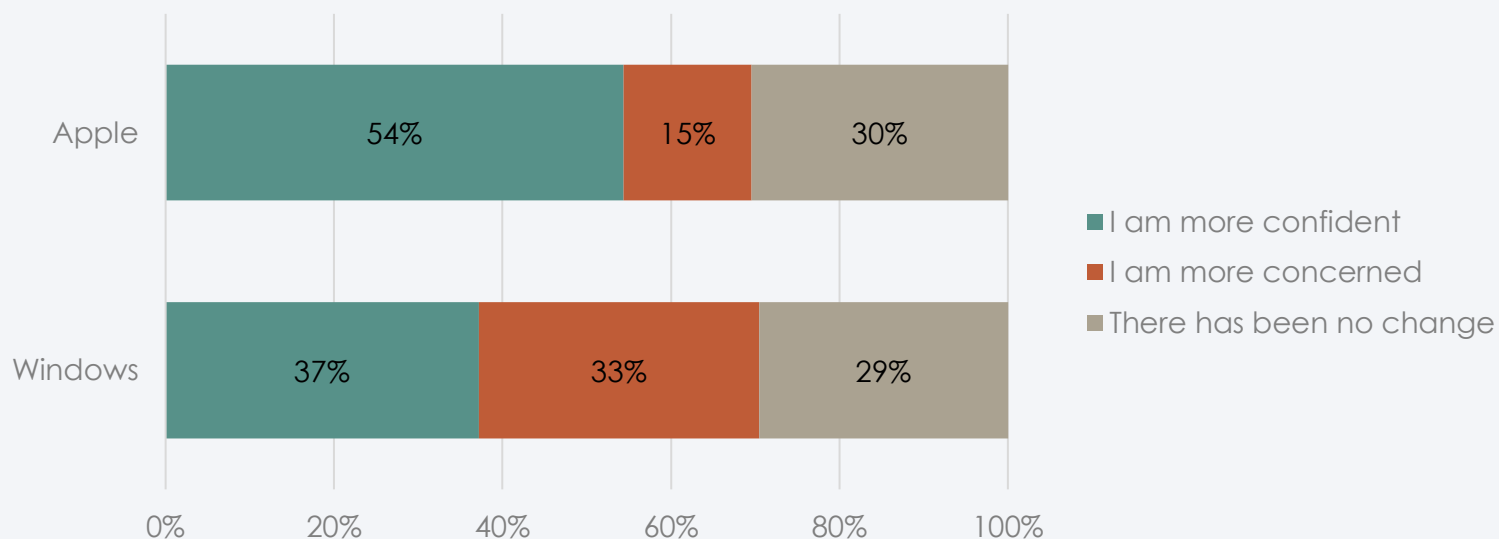# ALMOST HALF (48%) BELIEVE APPLE DEVICES ARE ADVANTAGEOUS FOR HYBRID WORKERS

Which of the following statements best represents your opinion of Apple devices compared to other employee device options (i.e. Windows, Android)?

- Apple devices have a lot of ADVANTAGES for hybrid workers
- Apple devices have a lot of DISADVANTAGES for hybrid workers
- Apple devices are NO DIFFERENT for hybrid workers than other options

CONFIDENCE IN REMOTELY MANAGING DEVICES HAS INCREASED MORE FOR APPLE THAN WINDOWS

How has your personal opinion of the ability to remotely manage Apple devices in a secure and efficient manner changed in the past two years?
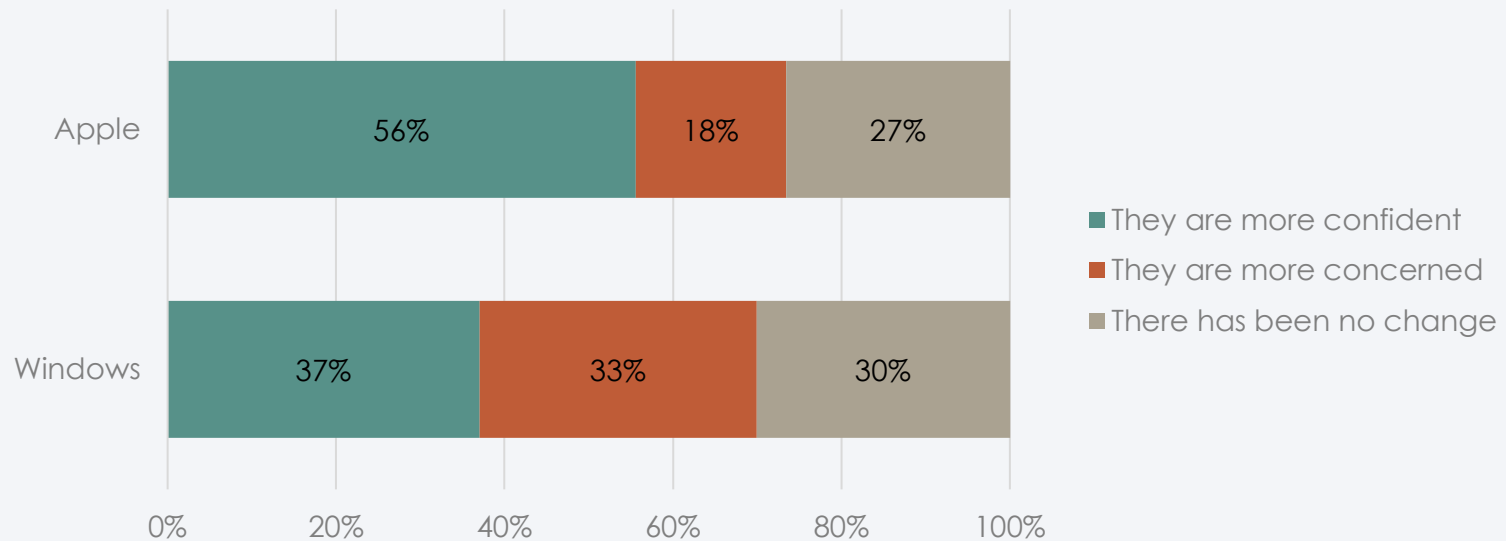
How has your personal opinion of the ability to remotely manage Windows devices in a secure and efficient manner changed in the past two years?

Apple: 54% | 15% | 30%
Windows: 37% | 33% | 29%

Legend:
- I am more confident
- I am more concerned
- There has been no change

IT LEADERSHIP IS ALSO MORE CONFIDENT IN REMOTELY MANAGING APPLE DEVICES

How has your IT leadership's opinion of the ability to remotely manage Apple devices in a secure and efficient manner changed in the past two years?
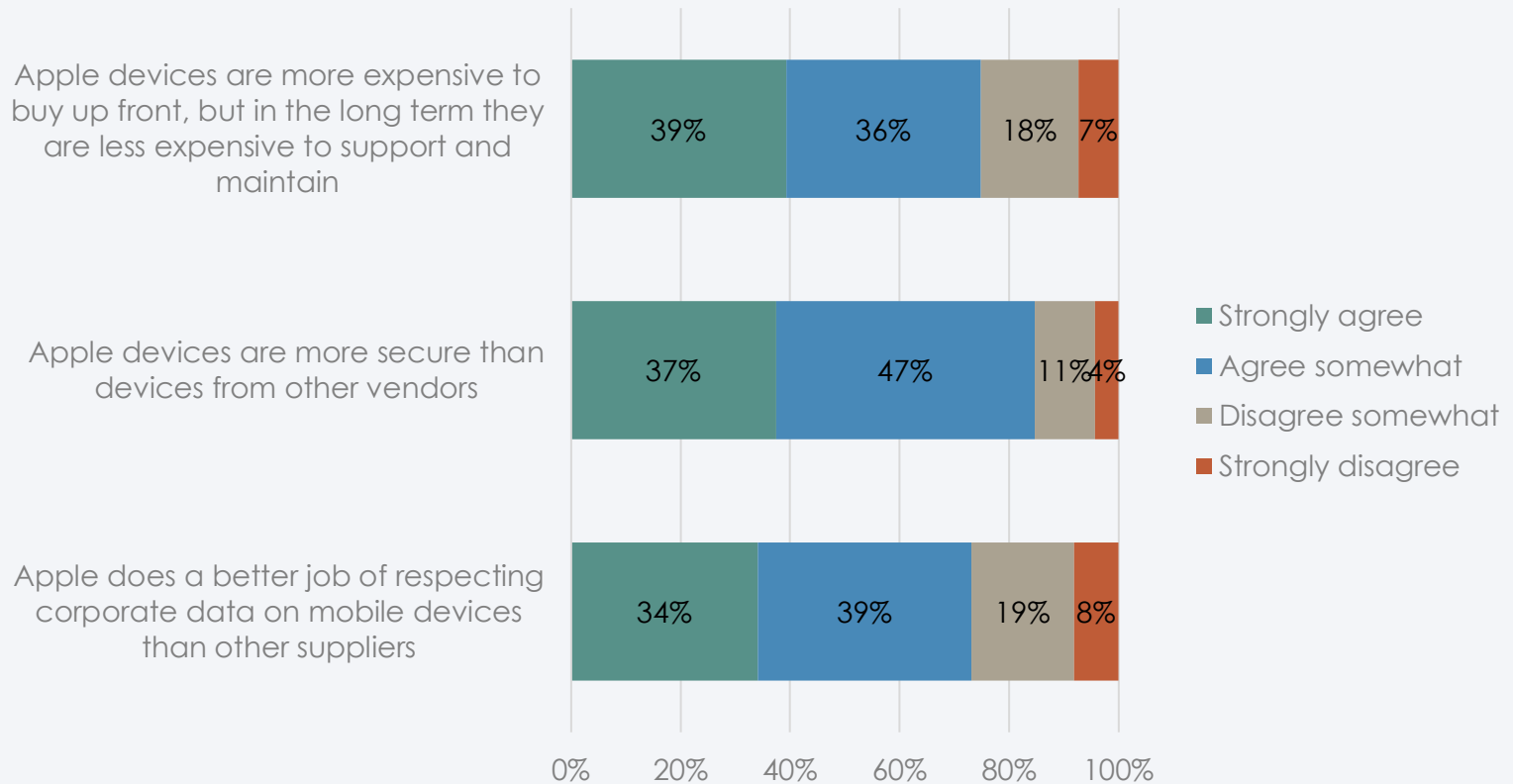
How has your IT leadership's opinion of the ability to remotely manage Windows devices in a secure and efficient manner changed in the past two years?

Apple: 56% They are more confident, 18% They are more concerned, 27% There has been no change

Windows: 37% They are more confident, 33% They are more concerned, 30% There has been no change

Legend:
- They are more confident
- They are more concerned
- There has been no change

IT STAKEHOLDERS AGREE APPLE DEVICES HAVE LOWER TCO AND BETTER SECURITY

Please indicate your level of agreement with each of the following statements:

Statement	Strongly agree	Agree somewhat	Disagree somewhat	Strongly disagree
Apple devices are more expensive to buy up front, but in the long term they are less expensive to support and maintain	39%	36%	18%	7%
Apple devices are more secure than devices from other vendors	37%	47%	11%	4%
Apple does a better job of respecting corporate data on mobile devices than other suppliers	34%	39%	19%	8%

METHODOLOGY AND PARTICIPANT DEMOGRAPHICS

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GOALS AND METHODOLOGY

Research Goal   The primary research goal was to capture hard data on trends and experiences with hybrid work and employee devices.

Methodology   IT stakeholders with responsibility for employee devices were invited to participate in an online survey. A variety of questions were asked on topics related to hybrid work, employee devices, and device management. Responses were captured between August 27 and September 8, 2021.
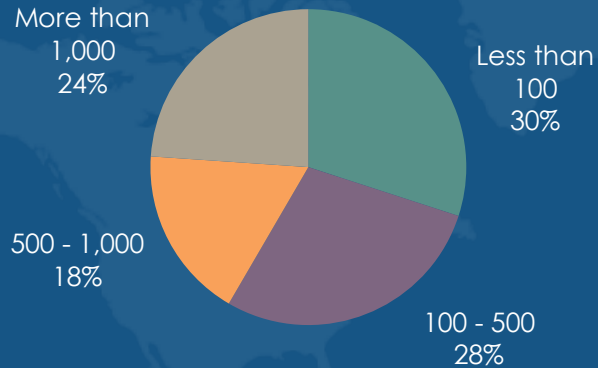
Participants   A total of **324 qualified individuals** participated in the survey. All had professional responsibility for selection, implementation, or ongoing management of employee devices including computers, laptops, tablets, and smartphones.

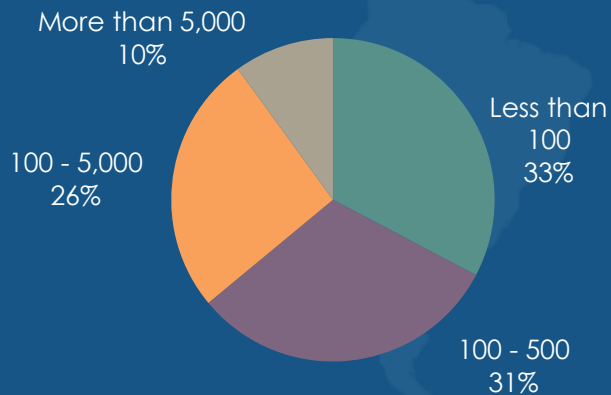*Certain questions may not add up to exactly 100% because of rounding.*
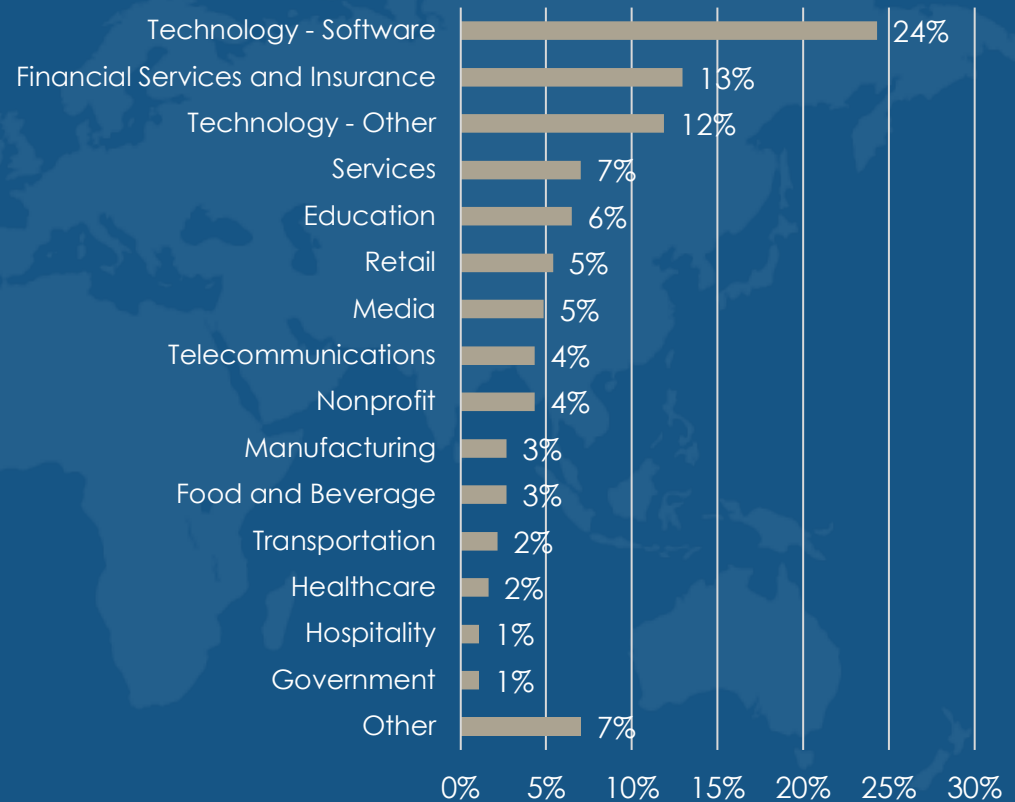
COMPANIES REPRESENTED

Company Size (# of employees)

- More than 1,000: 24%
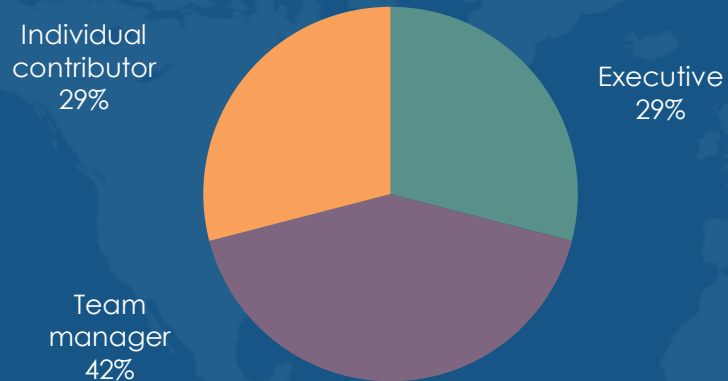- Less than 100: 30%
- 500 - 1,000: 18%
- 100 - 500: 28%

Employee Devices

- More than 5,000: 10%
- 100 - 5,000: 26%
- Less than 100: 33%
- 100 - 500: 31%

Industry

Industry	Percent
Technology - Software	24%
Financial Services and Insurance	13%
Technology - Other	12%
Services	7%
Education	6%
Retail	5%
Media	5%
Telecommunications	4%
Nonprofit	4%
Manufacturing	3%
Food and Beverage	3%
Transportation	2%
Healthcare	2%
Hospitality	1%
Government	1%
Other	7%

INDIVIDUALS REPRESENTED

Job Level

Individual contributor
29%

Executive
29%

Team manager
42%

Region

Asia Pacific
11%

Europe, Middle East, or Africa
18%

Latin America
2%

United States or Canada
69%
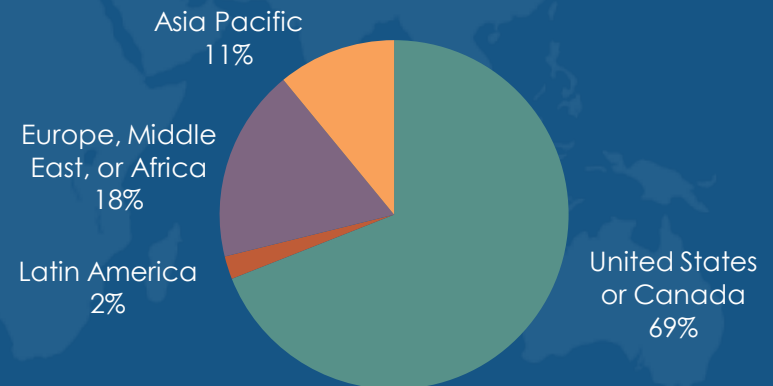
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