EMPLOYEE DEVICES AND THE HYBRID WORKFORCE
A Survey of IT Device Managers
October 2021
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

dimensional research
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?

Yes 94%
No 6%
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%
- Only remote: 36%
- Hybrid (mix of onsite and remote): 44%
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% Dramatically increased (five times or more)
- 55% Increased substantially (two to five times more)
- 15% Increased notably (25% - 100% more)
- 16% Increased somewhat (10% - 25% more)
- 6% Increased slightly (more, but less than %)
- 4% No change
- 4% Decreased

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.

- 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%)

n = have a hybrid workforce

Employees appreciate flexibility; Improved work/life balance; Lower carbon impact due to less commuting; Digital communication increases employee availability.
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.

- 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
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?

- It is GOOD for business: 85%
- It is BAD for business: 3%
- It doesn't have an impact one way or the other: 12%

n = have a hybrid workforce
OVERWHELMING AGREEMENT (97%) THAT THE HYBRID WORKFORCE IS HERE TO STAY

“The hybrid workforce is here to stay.”
DETAILED FINDINGS

APPLE ADOPTION INCREASES AS THE HYBRID WORKFORCE GROWS
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.

- Increased: 76%
- No change: 23%
- Decreased: 1%

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 Apple devices, please indicate how their level of use among your company’s employees has changed in the past two years.

- **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.

- 53% Increased more than 10%
- 31% Increased, but less than 10%
- 43% No change
- 4% Decreased

n = employees can request Apple devices (55%)
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% said they’ve seen a bigger increase in requests for Apple devices.
- 11% said they’ve seen a bigger increase in requests for other types of devices.
- 47% said there hasn’t 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.”

Agree 85%
Disagree 16%
DETAILED FINDINGS

APPLE DEVICES HAVE ADVANTAGES FOR REMOTE MANAGEMENT
What have been the most challenging aspects of managing devices for remote and hybrid workers during the past two years? Choose all that apply.

- 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%

n = have remote or hybrid workers
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.

- 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%
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 (48%)
- Apple devices have a lot of DISADVANTAGES for hybrid workers (11%)
- Apple devices are NO DIFFERENT for hybrid workers than other options (41%)
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% I am more confident
  - 15% I am more concerned
  - 30% There has been no change

- Windows
  - 37% I am more confident
  - 33% I am more concerned
  - 29% 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?

Apple

- 56% They are more confident
- 18% They are more concerned
- 27% There has been no change

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?

Windows

- 37% They are more confident
- 33% They are more concerned
- 30% 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:

1. Apple devices are more expensive to buy up front, but in the long term they are less expensive to support and maintain.
   - Strongly agree: 39%
   - Agree somewhat: 36%
   - Disagree somewhat: 18%
   - Strongly disagree: 7%

2. Apple devices are more secure than devices from other vendors.
   - Strongly agree: 37%
   - Agree somewhat: 47%
   - Disagree somewhat: 11%
   - Strongly disagree: 4%

3. Apple does a better job of respecting corporate data on mobile devices than other suppliers.
   - Strongly agree: 34%
   - Agree somewhat: 39%
   - Disagree somewhat: 19%
   - Strongly disagree: 8%
METHODOLOGY AND PARTICIPANT DEMOGRAPHICS
# GOALS AND METHODOLOGY

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<tr>
<th><strong>Research Goal</strong></th>
<th>The primary research goal was to capture hard data on trends and experiences with hybrid work and employee devices.</th>
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<tr>
<td><strong>Methodology</strong></td>
<td>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.</td>
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<td><strong>Participants</strong></td>
<td>A total of <strong>324 qualified individuals</strong> participated in the survey. All had professional responsibility for selection, implementation, or ongoing management of employee devices including computers, laptops, tablets, and smartphones.</td>
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*Certain questions may not add up to exactly 100% because of rounding.*
INDIVIDUALS REPRESENTED

**Job Level**
- Individual contributor: 29%
- Team manager: 42%
- Executive: 29%

**Region**
- United States or Canada: 69%
- Europe, Middle East, or Africa: 18%
- Latin America: 2%
- Asia Pacific: 11%
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