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Designing the Ideal Digital Work Experience for the Next Generation of Innovators

What Users Want, Why It Is Critical to Give It to Them, and How the Whole Organization Can Benefit as a Result

OCTOBER 2022

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Research Objectives and Methodology

OBJECTIVES

This eBook discusses user expectations for their digital work experience (i.e., experiences related to devices, collaboration tools, applications, and hybrid work scenarios employees have access to in the course of doing their jobs). In particular, this eBook explores differences in the attitudes and preferences observed between different generations of workers. These differences were quantified by a large-scale global survey of knowledge workers, IT decision makers, and HR stakeholders. When you read this eBook, you will:

- Learn how preferences related to devices differ among end-users by demographics, including the sustainability of the devices they use, the desire for user input on device specifications, and work styles preferred (i.e., in-office versus hybrid), among other topics.
- Understand why it is critical for organizations to adjust to these preferences to win the war for talent.
- Finally, see that while differences exist, shifting digital work strategies to cater to younger workers will resonate broadly and, ultimately, improve the experience for all workers.

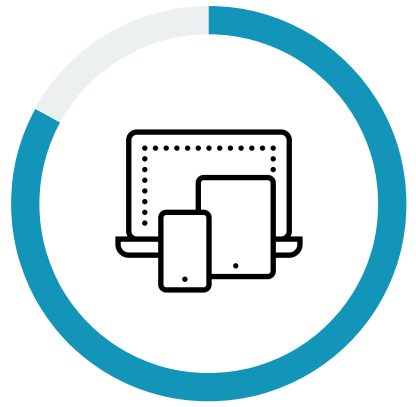
METHODOLOGY

In June 2022, ESG conducted a comprehensive online survey of 750 employee experience decision makers in IT and HR leadership roles and 2,000 knowledge workers able to comment on their digital work technology environments. The goal of the research was to prove that the processes, technologies, and investments organizations make in their digital work technology environments have an impact on their performance across IT operations efficiency, employee engagement, and business outcomes like innovation and revenue goal attainment. These key findings can be reviewed [here](#). Further analysis of the data has led to the development of this eBook.

Organizations represented spanned midmarket organizations (31% of respondents) and enterprises (69%), and the sample was composed of a horizontal mix of industry verticals. The research was also global in nature, spanning North America (24% of respondents), Western Europe (25%), APAC (25%), and LATAM (26%).

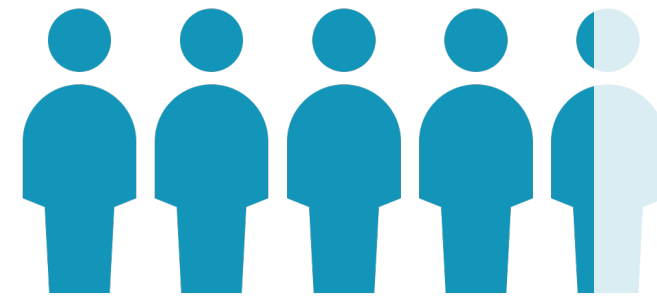
HIGHLIGHTED FINDINGS

End-users want to shape the device experience they rely on to do their work:



83%

of respondents who have had an influence on their device build are highly appreciative or appreciative of having that influence.



After provisioning,

more than 4 out of 5

respondents request upgrades to their devices or peripherals. End-users see both as being critical to their enablement.

End-users see automation and AI as game changers to device experience:



90%

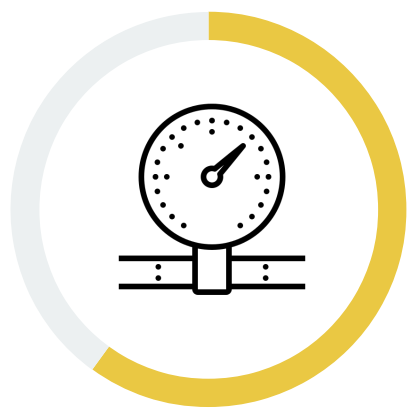
say automated/AI-powered performance optimization has had a significant or moderate positive impact on their device experience.

Device sustainability is on end-users' minds:



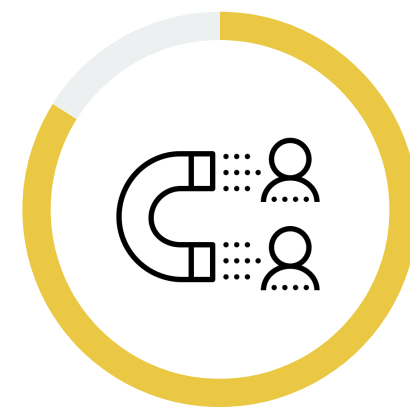
72%

want employers to source devices from vendors focused on environmental impact.



60%

of all respondents expect hybrid workstyles to persist and most often report that an uptick in their stress level would result if they are forced back to the office.



84%

of managers surveyed say it has gotten harder to retain existing employees, recruit prospective employees, or participate in both. End-users say a compelling device experience contributes to recruitment, while a poor device experience drives turnover.

A person wearing a blue button-down shirt is holding a smartphone in their right hand. They are also wearing a black smartwatch on their left wrist. In the foreground, a silver laptop and a spiral-bound notebook are visible on a desk. The background is slightly blurred, showing another person in a blue shirt. The overall lighting is soft and blue-toned.

Understanding End-users' Desire to Influence Device Specifications

Dell Technologies recommends Windows 11 Pro for business.

End-users appreciate being able to influence the build of their devices

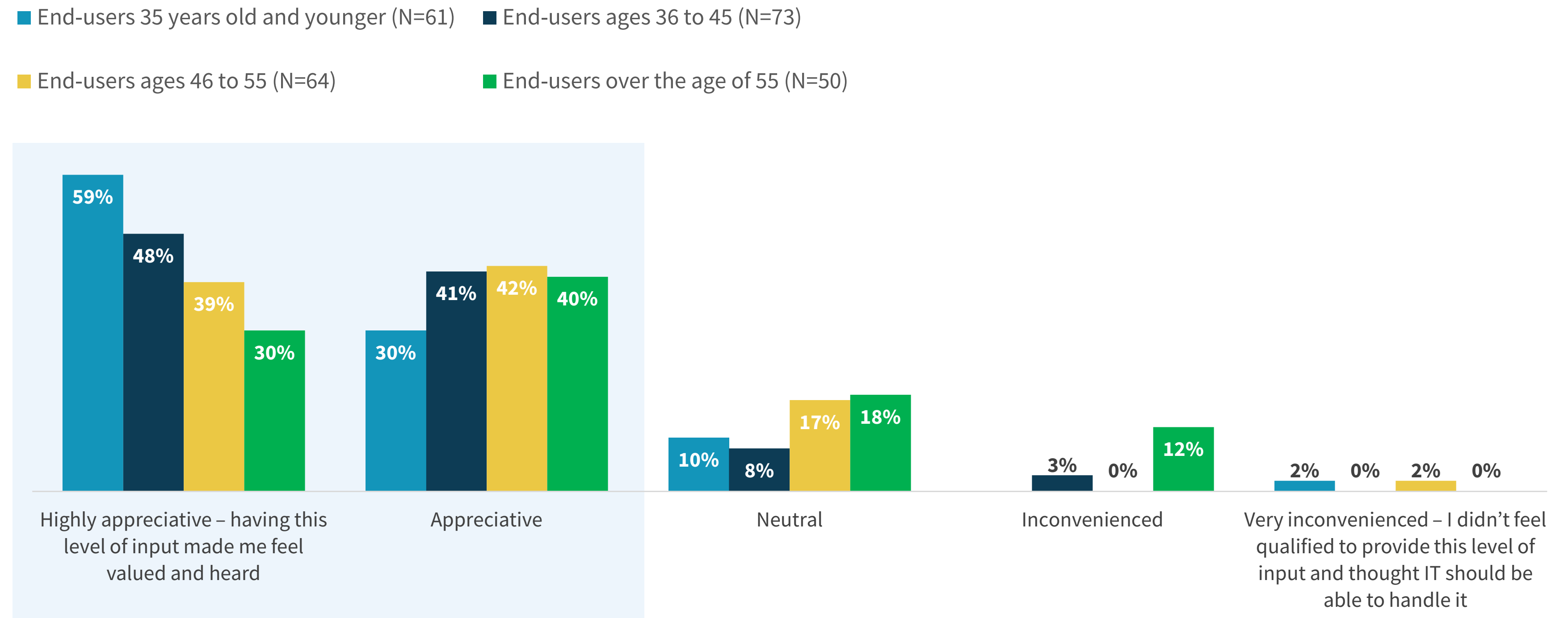
Knowledge workers spend a lot of their time on their devices. In fact, those participating in this survey were required to report spending at least half their time on a company-provided desktop or laptop. It stands to reason that users should be able to influence the build of their devices, spanning characteristics like performance specifications, form factor, apps installed, and more, to fit their needs.

However, organizations must balance user preference with operational efficiency. If every device was custom-tailored to every user, provisioning, management, break/fix response, and helpdesk processes would be incredibly complicated.

Organizations' efforts to strike this balance are apparent in the data. When ESG asked IT decision makers how much flexibility is afforded to end-users in device provisioning processes, the majority (62%) reported device builds are informed by the employee's role, requirements, and/or personal preferences, while just 38% reported all users are provided with a standardized device build.

Going a step further, it is clear that end-users want their voices heard. When ESG asked end-users whose companies allow them to shape their device build based on their preferences, **83% were highly appreciative or appreciative of having that influence, and respondents in the youngest cohort were 2x more likely than those over the age of 55 to be highly appreciative.**

How do you feel about being allowed to influence the build of your work device?



End-users identify the need for upgrades over device lifecycles and see them as important

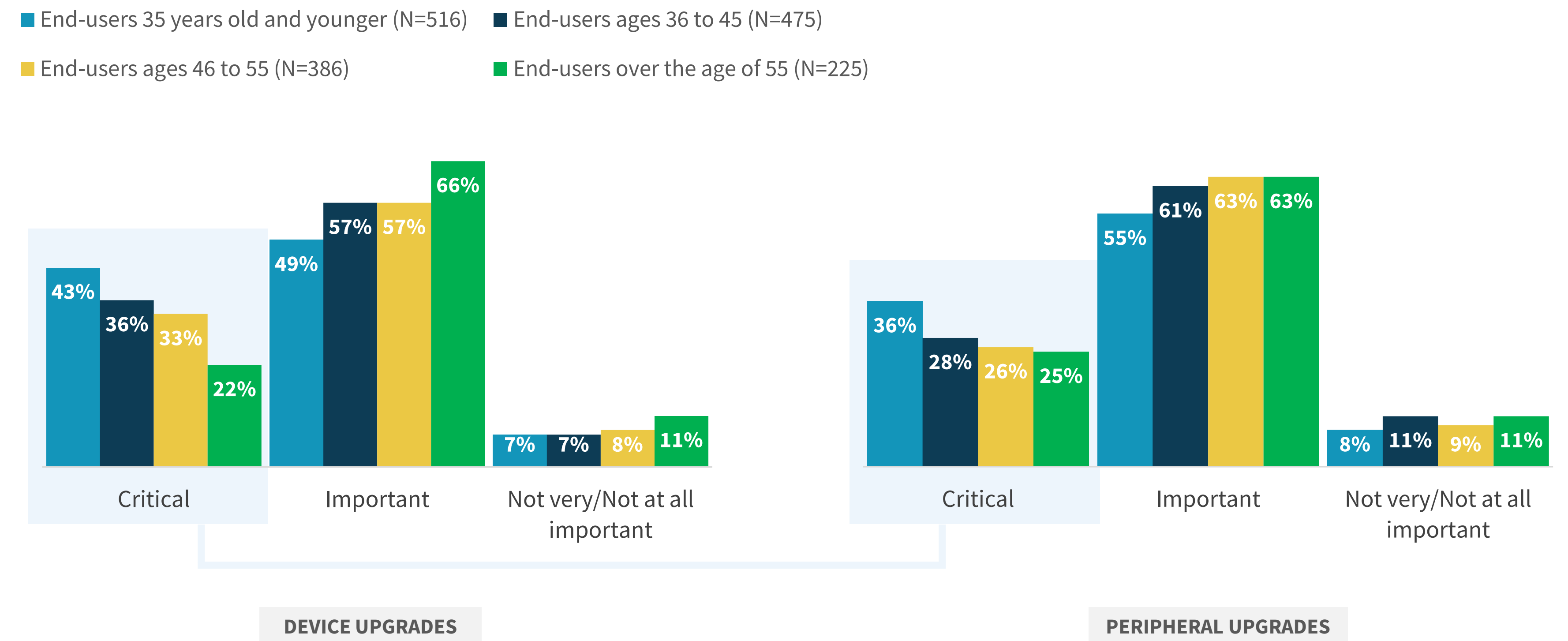
Influencing device build at the time it is provisioned is one thing, but modifying the device experience over time is another. The research shows that many end-users uncover the need to upgrade either the device itself, or its peripherals, over its lifecycle:

- **Only 18%** of respondents reported that they had never requested a device upgrade (e.g., hard drive, RAM, etc.) in the past.
- **Only 12%** reported that they had never requested an upgrade to their peripherals (e.g., a new monitor, web camera, microphone, etc.) in the past.

Where this data gets more interesting is when we see how much importance end-users attribute to these requested upgrades. **With respect to upgrades to the devices itself, 91% of end-users say these requests are critical or important to allowing them to do their best work, while 89% say the same about upgrades to their peripherals.**

Analyzing the data by end-user age, we see that younger respondents are much more apt than other age groups to see these upgrades as critical to their productivity.

How important are the device and peripheral upgrades you've requested to enabling you to do your best work/be as productive as possible?



A woman with dark hair, wearing a yellow ribbed top, is shown in profile, looking towards the right. She is holding a tablet that glows with a bright blue light. The background is a dark blue, futuristic digital space filled with various data visualizations, including line graphs, bar charts, and network diagrams. The overall aesthetic is high-tech and modern.

Younger End-users Recognize and Have an Affinity for AI-powered Device Features

Younger end-users are more discerning in terms of AI-powered device features

Device manufacturers continuously innovate their offerings with an eye toward increasing ease of use and end-user efficiency. Automation technology and AI are at the center of many of these capabilities, from tuning device performance, optimizing connectivity, and even reducing the background noise detected by the device’s microphone during virtual meetings.

ESG asked end-users if their device leverages automation and AI to deliver these types of functions. Looking at the data, younger users report automation and AI is more often in place to deliver each of the capabilities included in the survey. There are likely several items at play:

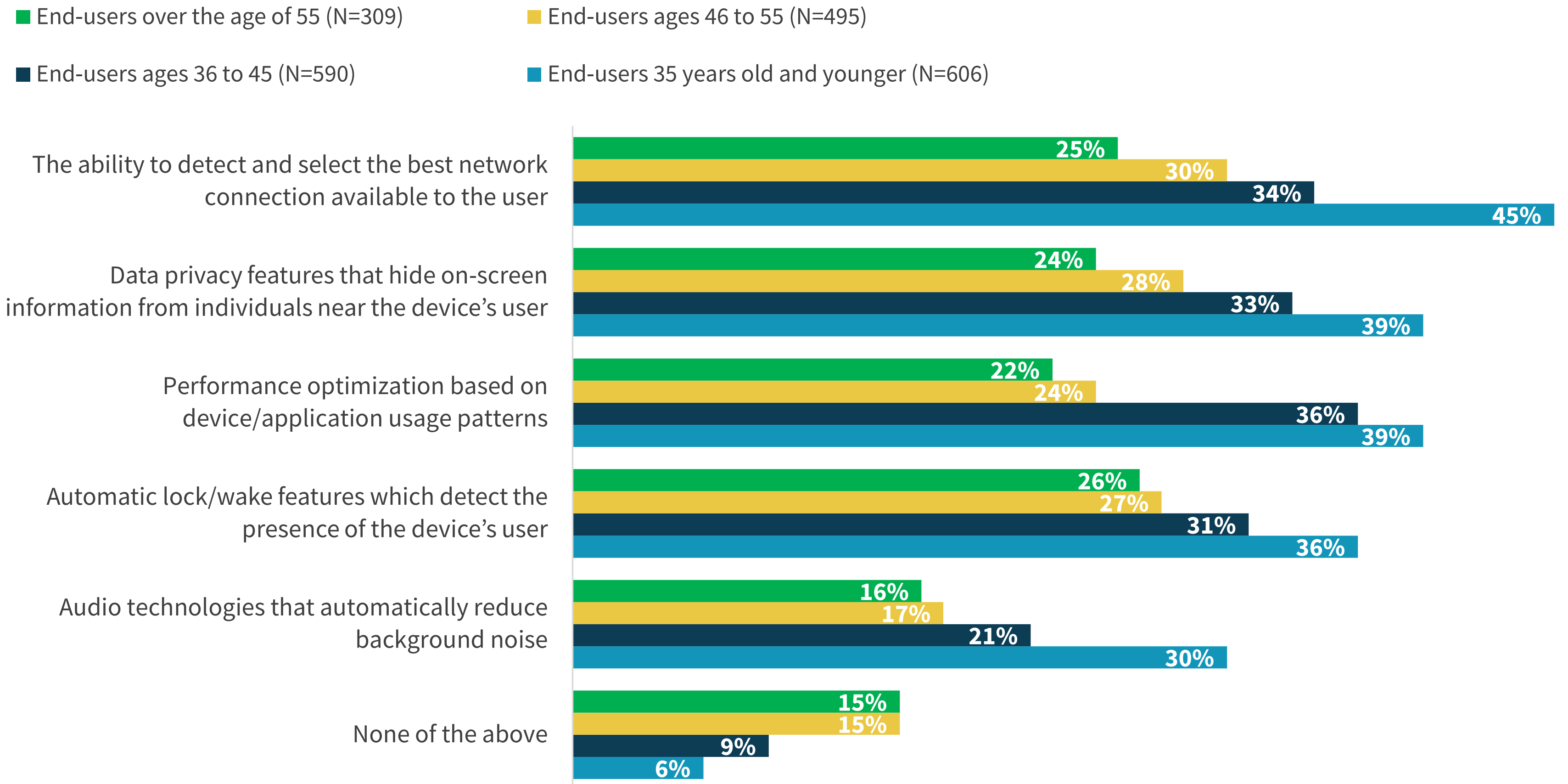
Younger users may be more tech savvy as a population and be more aware of the capabilities in place.

As noted, user preference plays a role in device builds, and younger users may have more affinity for automation and AI than their older counterparts.

The types of organizations younger workers seek out may, as a population, be earlier adopters of these types of technologies.

While this is interesting in and of itself, the sentiment users of different ages have regarding AI and automation is even more so.

What percent of users think their device leverages automation and AI to deliver the following capabilities?



Younger end-users have the most affinity for AI-powered device features

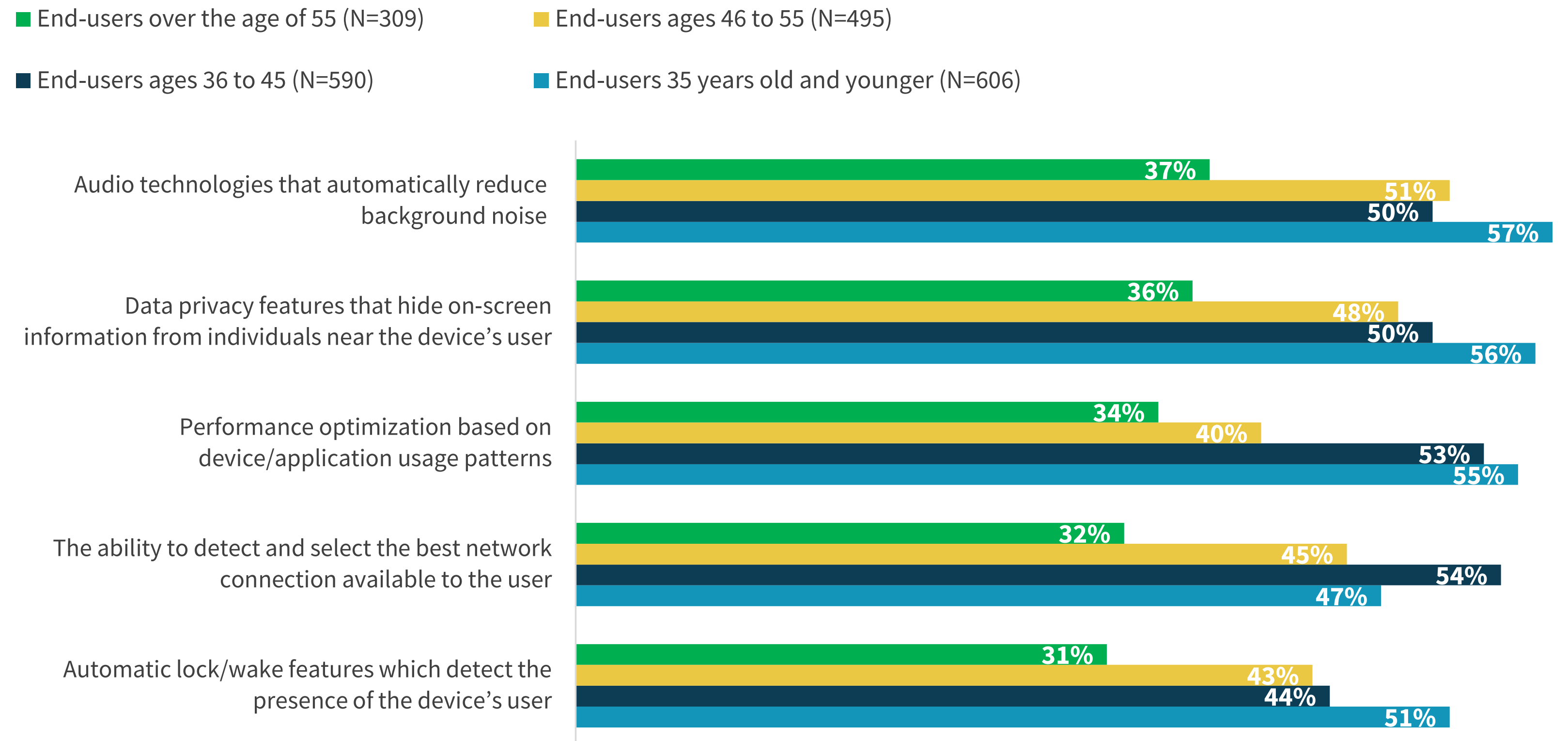
In the aggregate, automation and AI-powered capabilities built into devices are seen favorably by end-users who believe their device has these types of capabilities:

- 90% say automated/AI-powered performance optimization has had a significant or moderate positive impact on their device experience.
- 89% say automated/AI-powered data privacy features have had a significant or moderate positive impact on their device experience.
- 88% say automated/AI-powered network connectivity features have had a significant or moderate positive impact on their device experience.
- 88% say intelligent background noise reduction technologies have had a significant or moderate positive impact on their device experience.
- 81% say automated device wake/lock features have had a significant or moderate positive impact on their device experience.

However, a significant shift in perception does exist by end-user age: **younger end-users are much more apt to report significant positive impacts to their device experience across all features**, while older respondents are more likely to report a moderate positive impact.

What impacts are your device’s automated/AI-powered features having on your overall device experience?

(Percent of respondents reporting a “significant positive impact”)



End-users Care about Device Sustainability and Hybrid Work Flexibility



Device sustainability is top-of-mind for younger workers

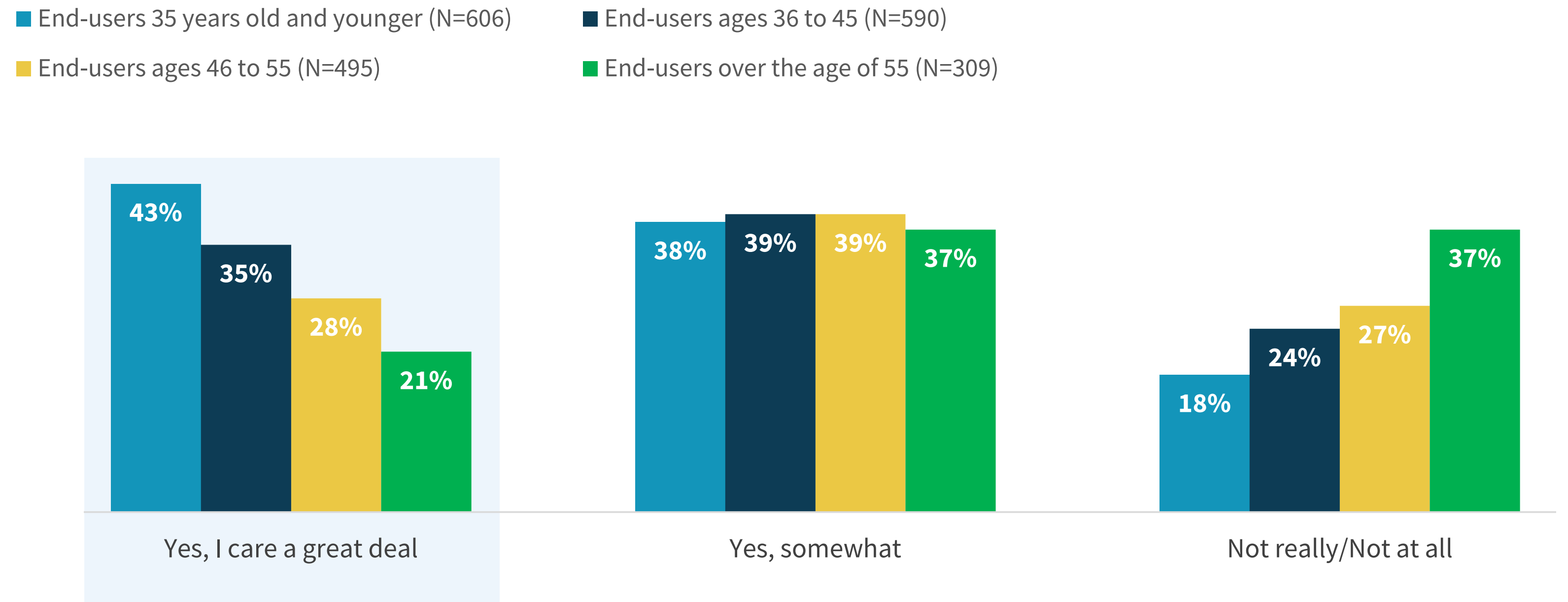
Another key finding from the research relates to device sustainability. ESG asked end-users if they personally care if their organization sources their device from a vendor focused on sustainability, meaning a vendor that takes all possible actions to lower the impact on the environment when producing and distributing devices.

In the aggregate, 72% reported this is something they care about, with 33% saying they care a great deal.

However, the degree to which they care varies by age: **younger workers were more than 2x as likely to say that they care a great deal about device sustainability versus those over 55 years old (43% versus 21%).**

To meet employee expectations, particularly among younger workers, organizations would be well served to prioritize device vendors with a strong sustainability strategy and educate their employee base about how the vendor’s sustainability strategy influenced the organization’s purchases.

Do you care if your organization sources your primary work device from a vendor focused on sustainability? (Percent of respondents)



Most end-users expect hybrid work to continue

For many knowledge workers, remote and hybrid work have become the norm over the past few years. Moving ahead, predicting what the norm will be is less clear. Many employers are attempting to incentivize, or mandate, more in-office work time, while others have embraced a “hybrid forever” strategy.

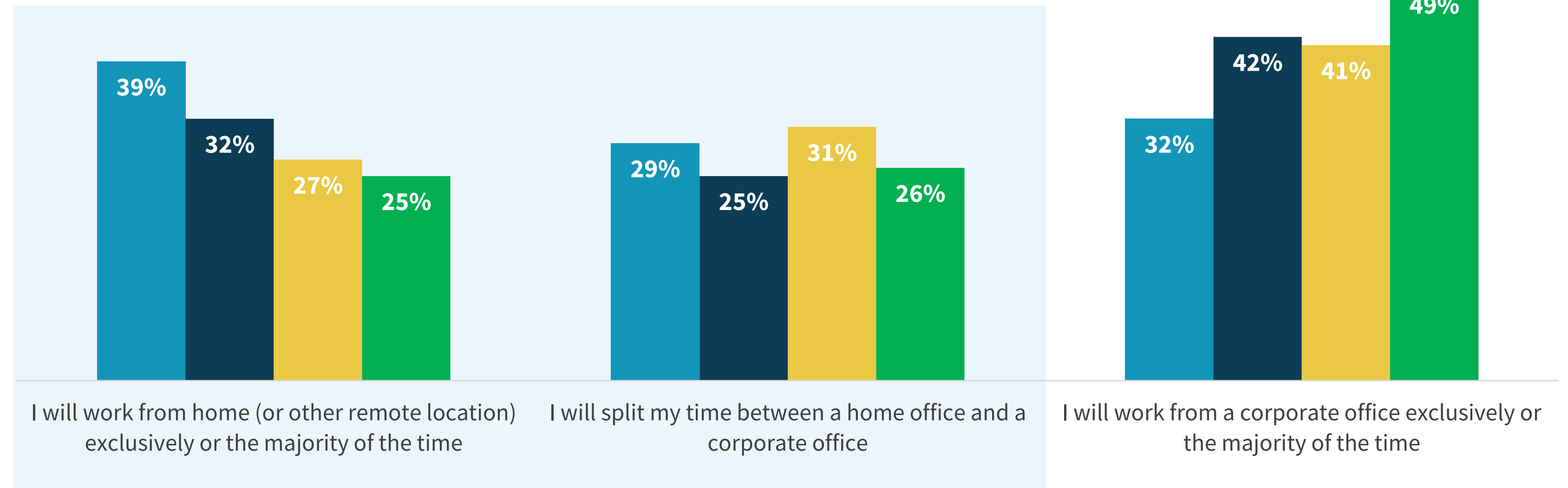
The fragmented approach of employers is mirrored in the expectations of employees. While a large number of younger workers report an expectation they will work from a remote location the majority of the time, older workers are much more likely to expect to work in the office the majority of the time.

However, **looking at the data in the aggregate, it is important to note that 60% of all respondents expect some degree of hybrid work to persist**, saying they will work from a remote location exclusively, the majority of the time, or roughly half the time.

And, as we will see, understanding employee expectations should be a component to any employers’ device and return-to-work strategies.

Where do you expect to work over the next 12 months? (Percent of respondents)

- End-users 35 years old and younger (N=606)
- End-users ages 36 to 45 (N=590)
- End-users ages 46 to 55 (N=495)
- End-users over the age of 55 (N=309)



A forced return to work may cause many workers 35 years old and younger to pursue other opportunities and ramp up employee strain across the board

As noted, 60% of all respondents surveyed expect to work from a remote location at least half the time over the next 12 months. ESG asked these respondents a hypothetical question: If your organization adopts a policy that requires more time to be spent in the office, what will your reaction be?

Two findings stood out:

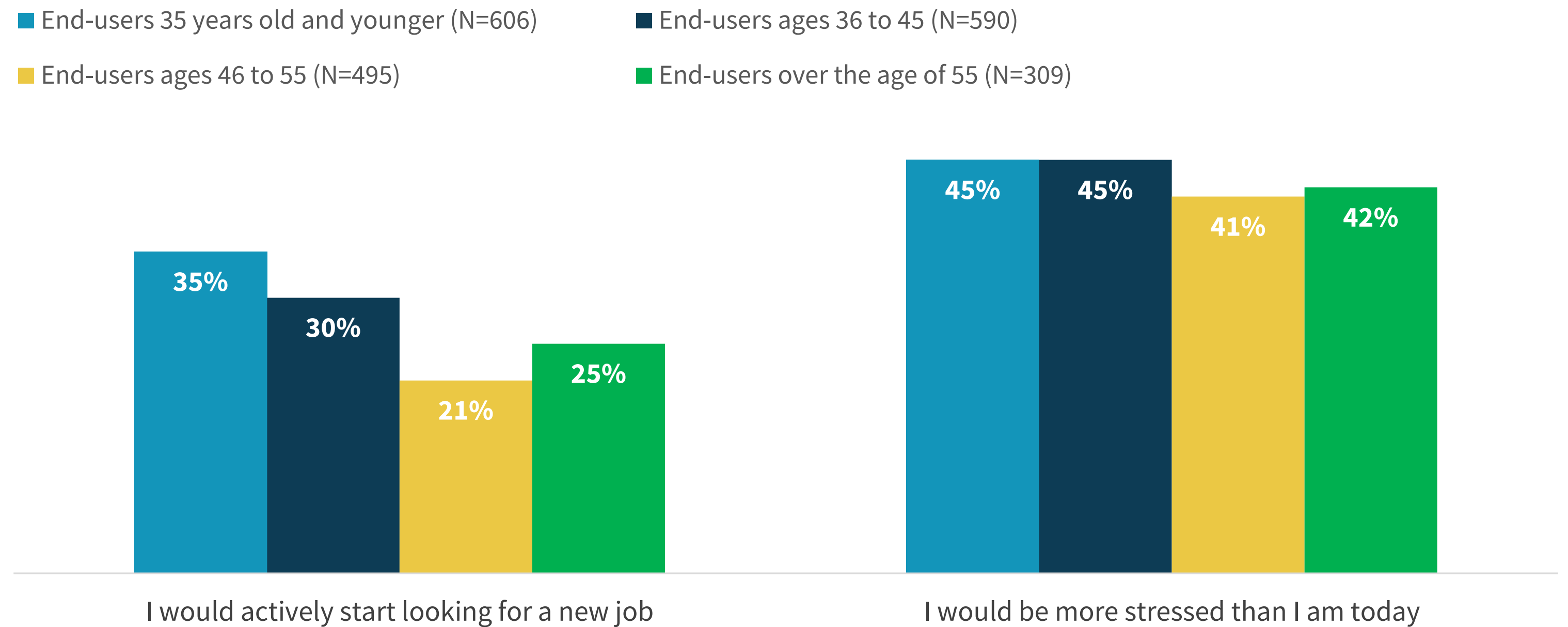
- 1.) 29% of all respondents reported they would immediately begin actively looking for a new job.
- 2.) 44% of all respondents reported their personal stress level would increase.

The first finding is noteworthy, but its variance by respondent age is also interesting. Younger workers were significantly more likely than their counterparts aged 46-55 and over 55 years old to report they would actively start searching for a new job (35% versus 21% and 25%, respectively).

The second finding is noteworthy for its consistency across age groups: It was the most common reaction among all respondents.

At a time when employee burnout, churn, and quiet quitting are all impacting many organizations, business leaders must be thoughtful about potential policy changes that will exasperate these issues.

If your organization adopts a policy that you must work in a corporate office the majority (or more) of your time, which of the following, if any, would be likely to occur? (Percent of respondents)



The device experience is critical to enabling effective hybrid work

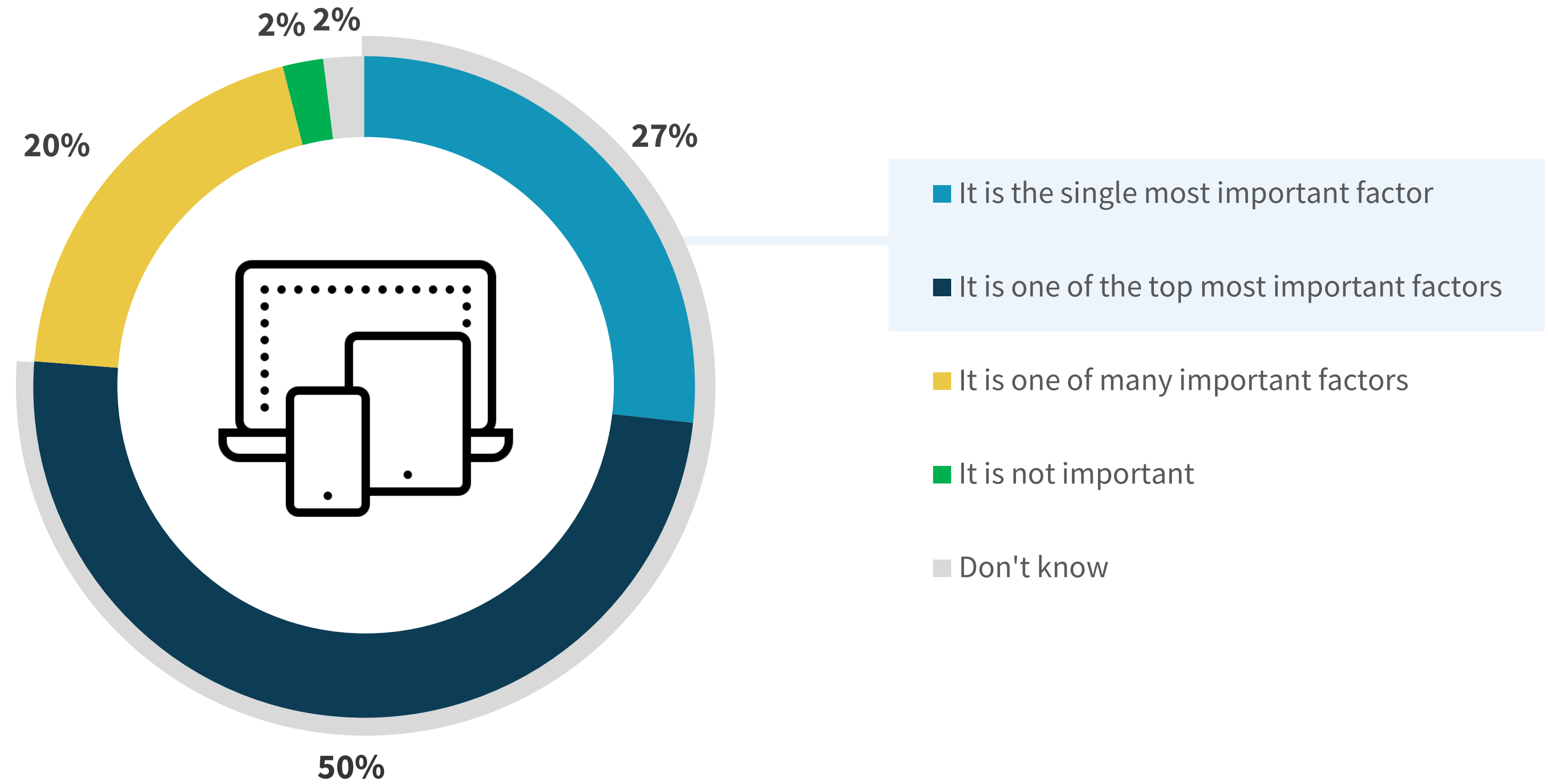
For employers planning to cater to employees' remote work preferences, the data is clear: Providing a device experience optimized for remote work is critical.

When asked about the importance of the device experience to their ability to be a successful remote worker, **77% of end-users said it is among the top factors.**

This includes delivering an experience that makes collaboration easy and productive, devices with cameras and microphones that ensure virtual workers are seen and heard effectively, and devices that are lightweight and allow workers to be productive on the move.

Not only is the device experience critical to end-users; it is critical to employers as well. Employees successful in their work contribute to the success of the organization, so a focus on the device experience is a win-win for both employees and employers.

How critical is your device/end-user experience to you being successful in your role as a remote worker?



**Meeting Employees'
Expectations Is Critical to
Organizational Success**



Managers say hiring and retaining talent is getting harder

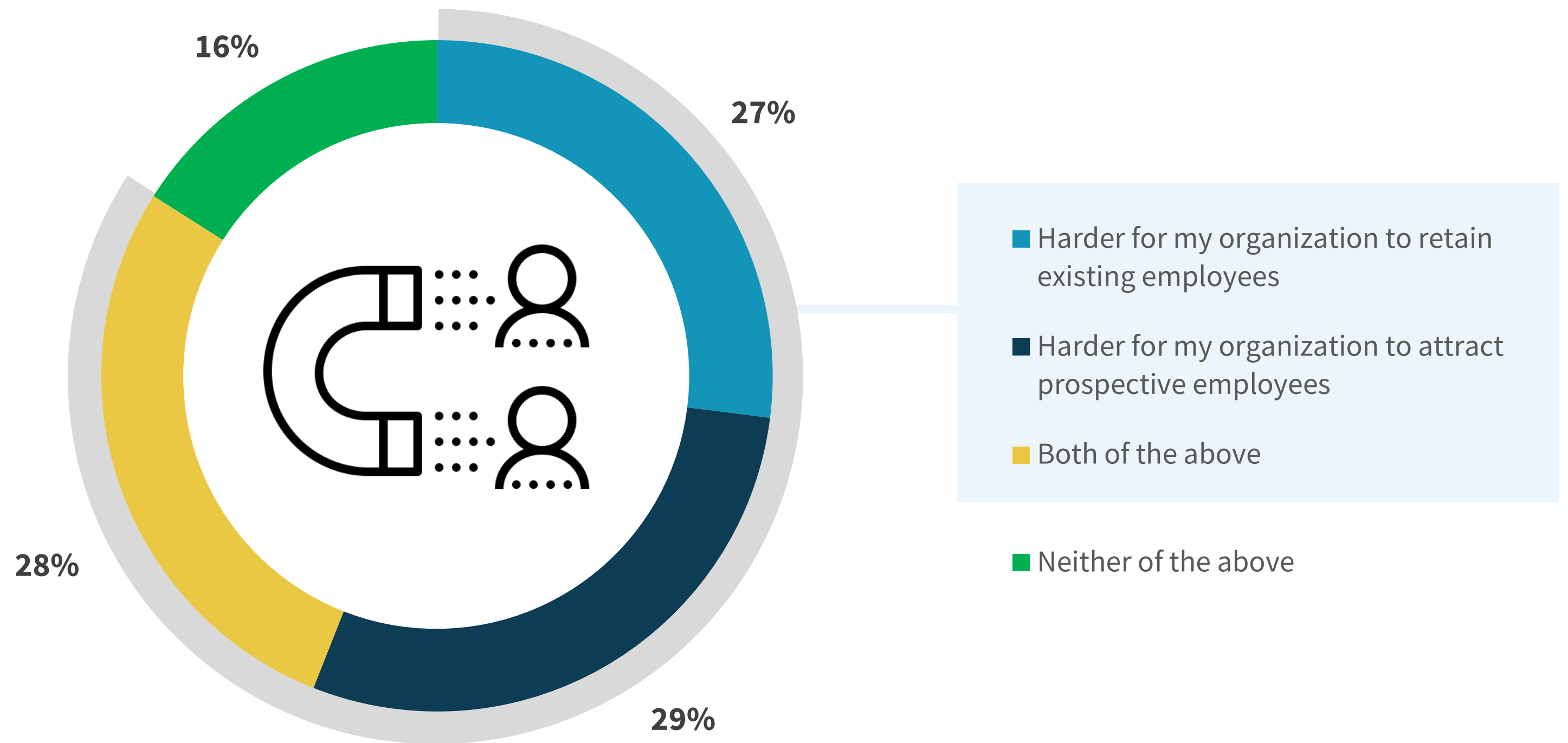
This eBook has discussed an array of considerations organizations must weigh when it comes to enabling their employees and meeting employees' expectations in terms of their digital work experience, from input on device build, modifications to that build over time, and empowering users with automation and AI to flexible remote work policies and sustainable device sourcing.

The broader macroeconomic environment amplifies the importance of these considerations. The labor market is tight and numerous articles are being written every day about flagging employee engagement and an uptick in quiet quitting.

ESG's data similarly shows that recruitment and retention of staff is challenging. When managers were asked to compare the labor market today versus 12 months ago, **84% said it has gotten harder to retain existing employees, recruit prospective employees, or both.**

With only 16% of managers reporting that human capital management is not getting harder, organizations would be well advised to do everything they can to surpass their employees' (and prospective employees') digital work expectations.

How has staff recruitment and retention changed for your organization over the last 12 months?



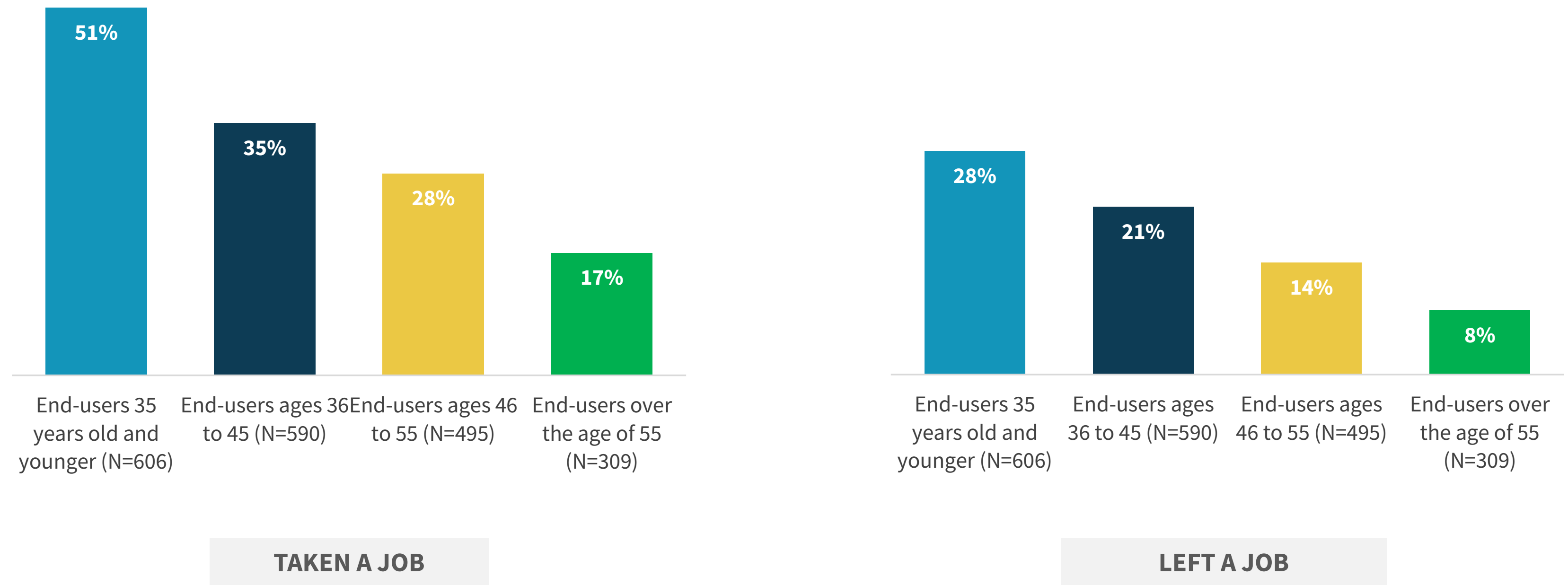
Device experience can contribute to both recruitment and churn

With organizations facing challenges related to both talent retention and recruitment, it is important to note that the device experience offered by organizations can play a factor.

The good news? A compelling device experience can be such a differentiator that a prospect will take a position with a given company as a result: 35% of all respondents report having taken positions, at least in part, due to the device experiences employers offer. Younger workers, despite their shorter career histories, are particularly likely to have been drawn to a job due to the device experience an employer offered. When compared with respondents over the age of 55, **younger workers are 3x more likely to have taken a job due to device experience (51% versus 17%).**

The bad news? While not as prevalent, a sub-par device experience can be such a hindrance that an employee will leave their position with a company as a result: 19% of all respondents report having left positions, at least in part, due to the device experience their employer provided. Again, younger workers are particularly likely to have been disenfranchised due to the device experience an employer offered. When compared with respondents over the age of 55, **younger workers are 3.5x more likely to have left a job due to device experience (28% versus 8%).**

Have you ever decided to accept a job or leave a job, at least in part, due to the device experience the company offered?



The Bigger Truth

This eBook shows that younger workers act as a leading indicator among employees in terms of device preferences. They are the most likely to want their voices heard when it comes to device builds and upgrades, they are the most apt to recognize—and appreciate—when their employers invest in automation and AI to improve their device experience, they are more emotionally invested in device sustainability and the ability to continue to work in a hybrid manner, and they are the demographic most apt to be drawn to—or repelled by—employers based on the device experience they offer to employees.

And while younger workers are the most likely to feel these ways, it is not to say older workers don't share these sentiments: 83% of all respondents appreciate being able to influence their device build, between 81% and 90% of all respondents say automation and AI-powered features are improving their device experiences, and 72% of all respondents care if their employers source devices sustainably. Younger workers simply act as a leading indicator to employers about the types of digital work experiences they should focus on.

Moreover, **all employees benefit from investments in devices that meet the expectations of younger workers.** Devices tailored to a user's preferences will **improve productivity and engagement**, automation and AI **can improve efficiency regardless of age**, and adapting to a new hybrid normal that empowers workers wherever they are **improves collaboration and fosters innovation.** Organizations should not only take note due to employee expectations in the face of a challenging environment for talent recruitment and retention, but they should also take note because empowering people puts the organization in the best position to succeed.

[Read more about the research](#)



How Dell Technologies, Microsoft, and Intel Can Help

Dell Technologies, Microsoft, and Intel are driving innovation and next-generation capabilities with the broadest portfolio of trusted client and enterprise solutions for cloud and data management, enabling businesses to move faster, intelligently innovate, and operate efficiently.

Dell Technologies' hybrid work expertise and innovative technology portfolio enable you to lead the future of work with the best employee experience. Our intelligent, personalized devices enable seamless productivity from anywhere with intelligent privacy features so your users can work easily and confidently anywhere with AI-based software that learns and adapts to how they work.

Dell Technologies recommends Windows 11 Pro for business. Windows 11 Pro is powerful for employees. Consistent for IT. Secure for all. A simple, powerful UX helps improve employee productivity and focus. App compatibility and cloud management make adoption easy. A Zero Trust-ready OS helps protect data and access, wherever business takes you.

Intel vPro® takes a revolutionary leap forward in real world business performance. Powered by 12th Gen Intel® Core™ processors, Intel's most scalable client architecture delivering superior computing performance. Hardware-enabled security features are integrated to enhance software solutions, helping to drastically decrease the PC's attack surface. All on the trusted platform that supports business continuity with management and reliability features. And now, Intel vPro® is available in more options than ever before, with support on multiple OSs and offerings for small/medium and large companies, so every user can be empowered with a "built for business" PC.

[How Dell Technologies Can Help](#)

The Dell Technologies logo, featuring the word "DELL" in a stylized blue font with a diagonal line through the "E", followed by the word "Technologies" in a grey sans-serif font.

The Windows 11 logo, consisting of the four-pane Windows logo in blue followed by the text "Windows 11" in a blue sans-serif font.

The Intel logo, featuring the word "intel" in a bold, lowercase, black sans-serif font with a registered trademark symbol.

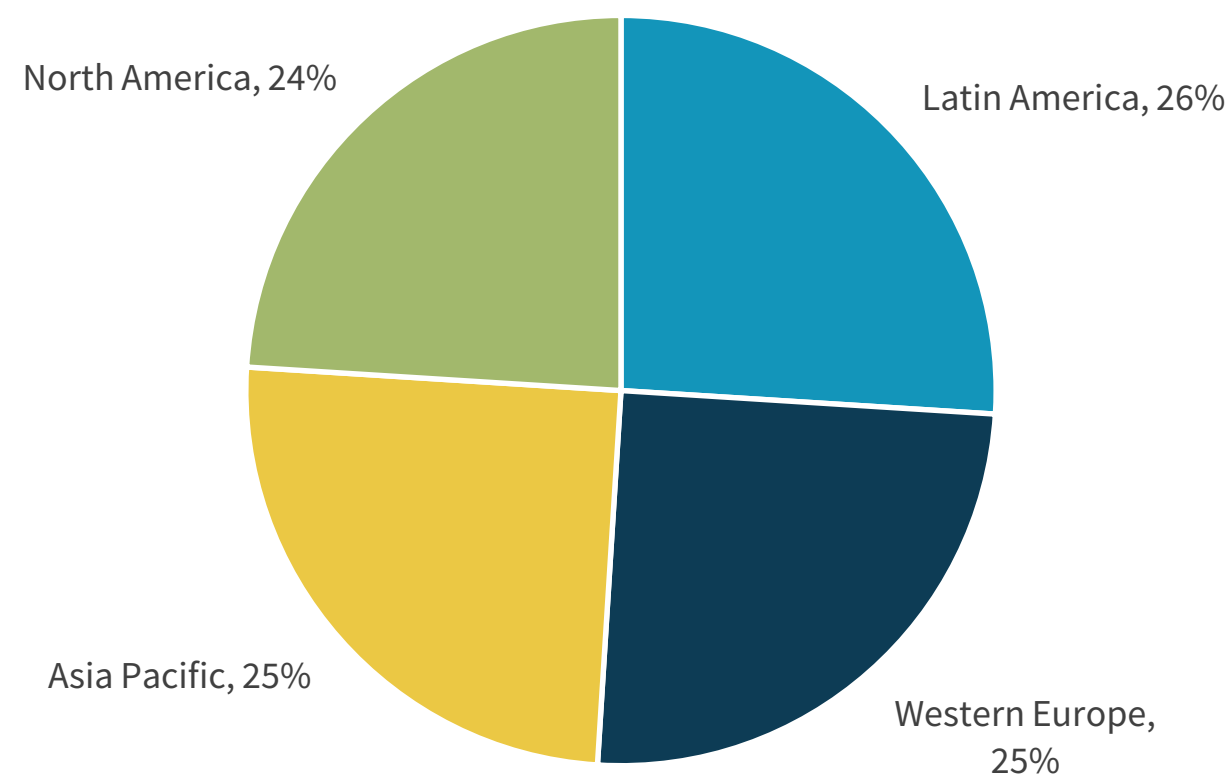
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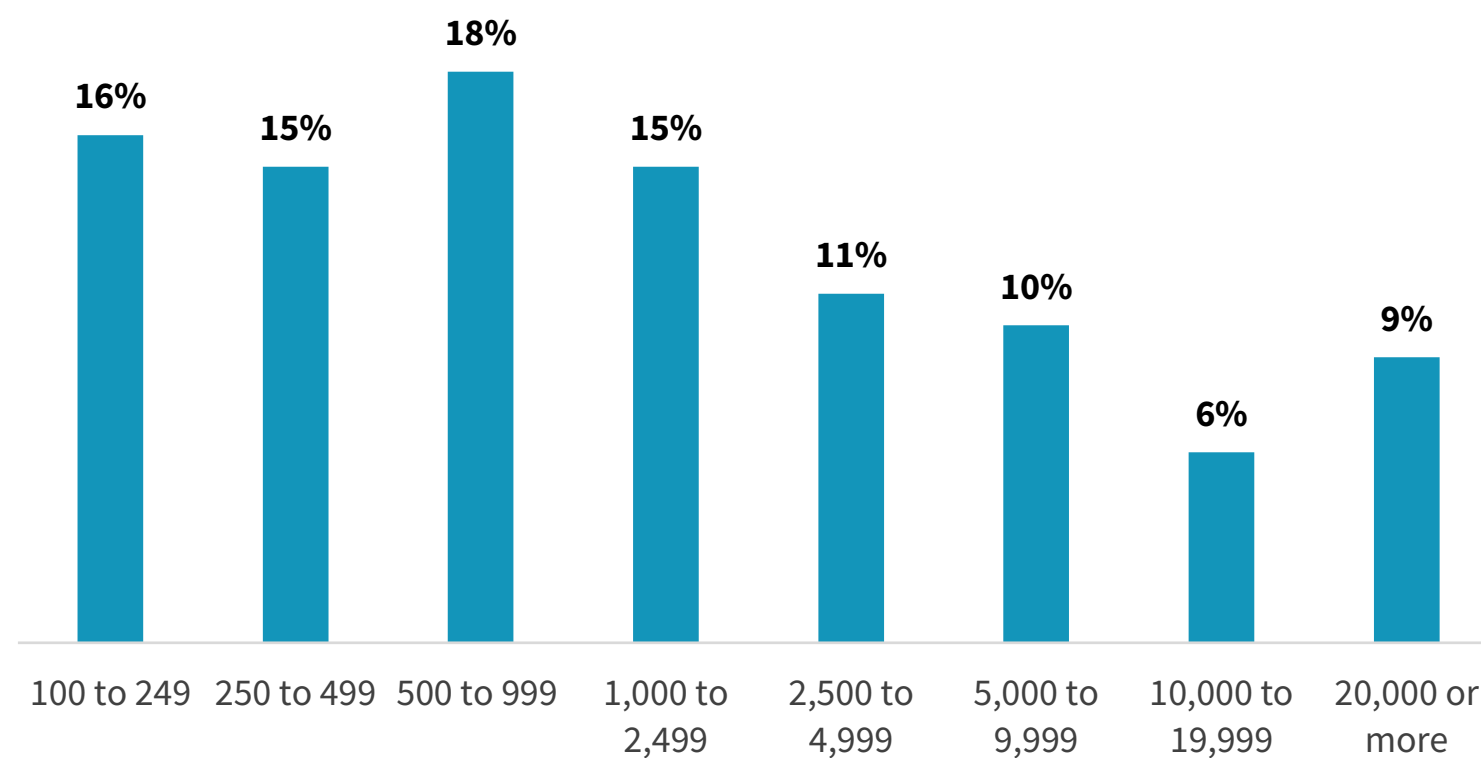
Organizations represented span all private- and public-sector organizations across the globe, including respondents based in the US, Canada, Mexico, Brazil, the UK, Germany, France, Japan, Australia, New Zealand, and Singapore. The survey was fielded between June 2, 2022 and June 24, 2022. The margin of error for this sample size is + or – 2 percentage points.

All respondents were provided an incentive to complete the survey in the form of cash awards and/or cash equivalents. Note: Totals in figures and tables throughout this report may not add up to 100% due to rounding.

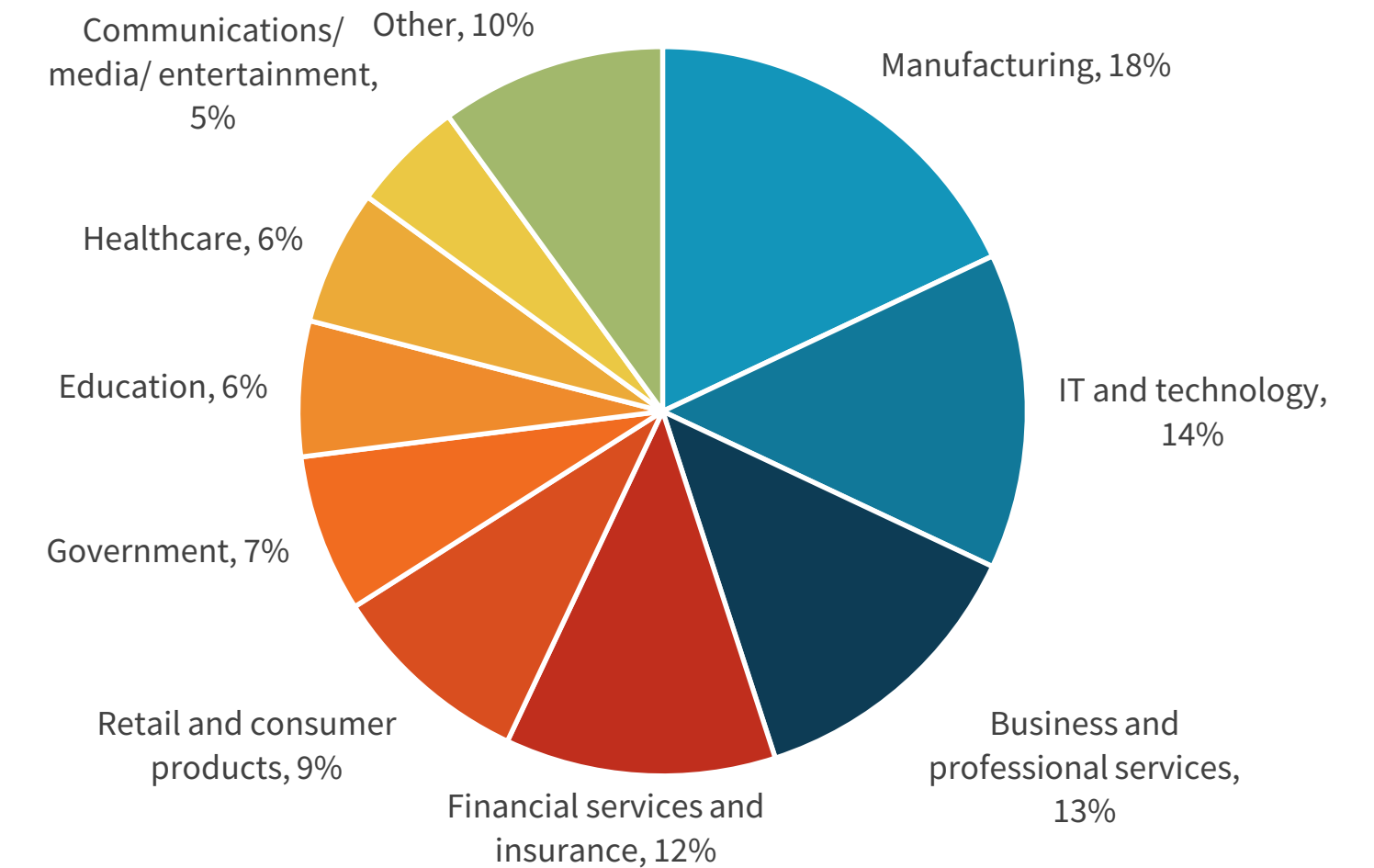
**RESPONDENTS BY REGION.
(PERCENT OF RESPONDENTS, N=2,750)**



HOW MANY TOTAL EMPLOYEES DOES YOUR COMPANY HAVE WORLDWIDE? (PERCENT OF RESPONDENTS, N=2,750)



WHAT IS YOUR ORGANIZATION'S PRIMARY INDUSTRY? (PERCENT OF RESPONDENTS, N=2,750)



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