

Device

Decisions

The future is hybrid:
considerations for IT leaders
in the changing workplace





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Foreword



Howard Lewis, Surface Business Group Lead, Microsoft UK

Methodology

YouGov conducted an online survey and Microsoft UK compiled this resulting report. Total sample size was 3027 UK employees, surveyed between 21st September and 1st October 2021, and 1003 ITDMs, surveyed between 23rd September and 4th October 2021.

The pandemic triggered global remote working at a scale never seen before and IT teams across the UK rose to the challenge, investing in devices and tools to support this. While these initial investments were borne out of urgent necessity, the gradual return to offices and proliferation of **hybrid working models are giving rise to new mandates and incentives around devices.**

Employees who have 'made do' with the same device throughout their time working remotely are now looking for upgrades that better suit their individual needs – as remote working arrangements which started as temporary measures have quickly become the norm. As a result, organisations that have now transitioned to a hybrid model are looking to IT leaders to help guide them, and make the right device and infrastructure investments for hybrid to work most effectively, long term.

This report finds IT leaders are ready to tackle this challenge.

To better understand the pressure IT decision makers (ITDMs) are under to make smart investments in tech, as well as the factors impacting their decision making, the Microsoft Surface team commissioned YouGov to survey employees and ITDMs across the UK. It found the majority of ITDMs (73%) have the adequate budget they need to support hybrid workers in 2022.

For ITDMs, this is a dream come true, as they now have all they've wished for - organisational support for investing in and deploying new technology, and the budgets that go with it.

However, this opportunity comes with heightened pressures and expectations. The massive shift to remote and hybrid operations means device deployment is more important than ever for driving innovation, supporting 'anywhere operations', enabling frontline worker connectivity, as well as attracting and retaining high calibre talent.

For some staff, a powerful device on offer is part of their consideration as to whether they should join a company – or not, as some view it in the

same manner as a company car, while others view a powerful device as the bare minimum for getting their work done.

The insights from this research highlight these changing employee expectations about their devices, as well as several more disconnects between IT teams and the staff that they support. They also reveal a positive roadmap for greater alignment between IT and employees, with a middle ground comprised of common goals and priorities that will help ITDMs make device investments with much greater confidence.

Few could have predicted the sudden global shift to remote working, and the workplace will keep changing in unexpected ways as technology evolves and organisations everywhere experiment with hybrid models. We hope this report will illuminate the path toward a future-proof workplace, by highlighting the most important considerations for ITDMs as they weigh up device investment decisions. **Our goal is to help IT teams meet changing employee expectations and set their organisations up for long-term success, in this new hybrid world of work.**



Chapter one

Key findings



Key findings

UK employees are no longer tied to their desks

With offices opening back up, organisations across the UK are continuing to experiment with hybrid work arrangements. While solely office or work building based workers comprise the largest portion of the workforce at 38% of those surveyed, another 29% now identify as hybrid workers—mixing home, remote, and office working—while 15% are home workers only.

This shows just how varied people's working habits and environments are. Another recent Microsoft report—the [2021 Work Trends Index](#)—reveals that while 73% of employees want the option to continue to work remotely after the health crisis is over, 67% want more in-person engagement. We would appear to be facing a paradox then – with employees choosing different ways

to work, without consensus on a single way forward that is right for everyone.

Hybrid working will be the key to resolving this, so companies everywhere will need clear policies in place to support new work arrangements. In many cases over the past year, government mandates and recommendations to work from home meant organisations had little choice about supporting remote operations. Now, however, gradual re-opening has created ambiguity around whether, and to what extent, hybrid work should be prioritised long term, with many organisations opting to figure it out as they go. As the data will show, however, preparing for hybrid work is an increasingly urgent priority for companies across the UK, which is creating new pressures for ITDMs.



"As some people begin to return to the office, we have focused on maximising the capabilities of Microsoft Teams Rooms systems so that remote participants and in-person ones can get the most out of meetings. We use co-ordinated meetings with Surface Hub as a digital whiteboard within our Teams Rooms spaces. The feature helps remote and in-person participants contribute equally, and makes it simple to create a powerful collaborative environment for colleagues to ideate and solve problems."

Stephen Bolton, Product Owner,
Communication and Collaboration at Marks & Spencer

Routine device upgrades were shelved, but now tech refreshes are back

While there was an initial increase in purchases of new devices to facilitate remote work, our findings show 66% of employees with a work-related, company-owned laptop/tablet have been using the same one since the onset of COVID-19. This figure is even higher among frontline workers¹, 71% of whom have been using the same device.

Initial investments enabled previously office-bound workers to continue operations remotely – but routine device upgrade cycles were temporarily shelved for staff who were already equipped, or could easily pivot to remote operations. Overall, 25% of these employees were given a new device, but only 19% received the device as part of a routine upgrade cycle.

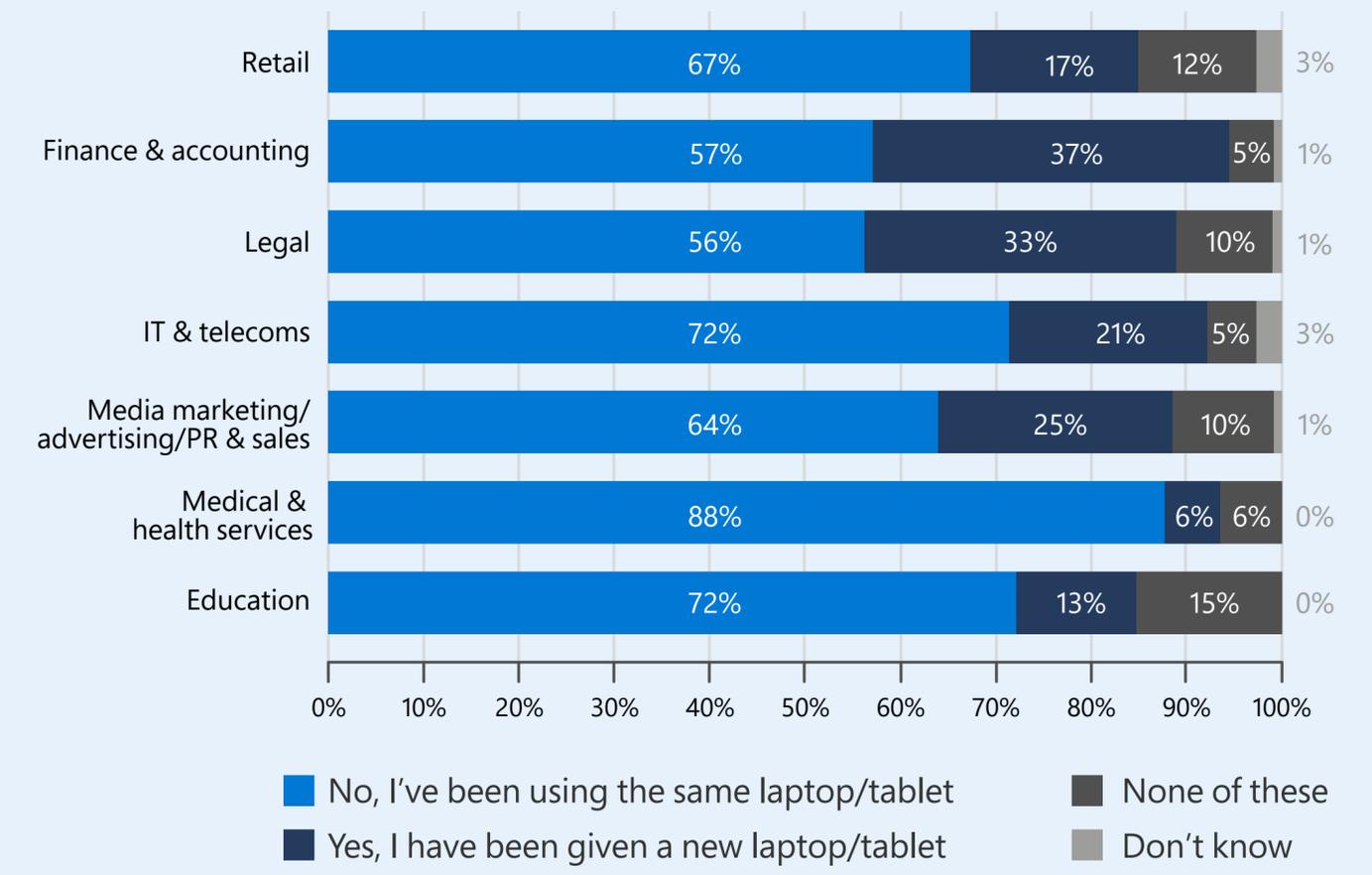
IT teams have been working tirelessly over the past 18 months to keep businesses operational. A major focus was on ensuring staff could work remotely, being able to access the information they needed while still keeping company data secure. Yet this intense concentration on the infrastructure behind the scenes has meant many employees haven't seen a tangible difference in the technology they engage with most directly: the device in front of them. Armed with the confidence and knowledge that back-end infrastructure is now capable of supporting remote operations, IT teams should have more capacity to focus on deploying new hardware which meets staff's emerging needs and preferences.

66% of employees with a work-related, company-owned laptop/tablet have been using the same one since the onset of COVID-19.

¹ Frontline workers have been defined amongst survey respondents as those who identified as working in the following job roles: caregiver, nurse, doctor or surgeon, dentist, retail or personal banker / loan officer, sales associate / salesclerk / cashier, security guard, teacher or professor, police officer, correction officer, or other law enforcement and veterinarian. The total sample size for frontline workers is 208.

The industries that reported the highest number of upgrades were finance and accounting (37%) and legal (33%). This is unsurprising when you consider that these industries have traditionally been office-based, with more stringent requirements around security and data protection. Conversely, those in “key worker” fields such as healthcare, education, and retail report having less support from employers when it comes to device upgrades that meet their individual needs, findings that are likely indicative of the digital maturity of those sectors.

Since the onset of COVID-19 has your organisation changed or upgraded the laptop or tablet you use as the main tool to do your job?



New devices – designed for hybrid

Employee needs are changing. While most UK employees with a work-related, company-owned device (61%) feel their current device adequately supports their role, one in three (34%) feel it could be better, more powerful, or better suited to working on the go.

Additionally, there appears to be a shortfall of people who believe their devices will be capable of supporting hybrid work, increased security, as well as greater connectivity and collaboration in 2022. Only 37% of frontline workers feel their current device will support these requirements, compared to 58% of non-frontline workers. This suggests the need to refresh frontline workers' devices is even more urgent than for those in traditional office-based jobs.

Regardless of role, employee working patterns have changed dramatically over

the past 18 months and the data shows people need flexibility in the device they are using. It is a clear mandate to ITDMs: employees expect the best from their devices so they can work wherever and however they need, and are looking to IT to provide the hardware that can keep up – while also accounting for individual requirements within set roles.

The good news is that ITDMs are indeed ready to address these concerns. After a period of upheaval, nearly three-quarters (73%) say they have the adequate budget needed to support hybrid workers in 2022. A recent Forrester Consulting study² also found that 76% of decision makers responsible for employee equipment plan to increase investments in PCs over the next couple of years, with 36% of this group expecting double-digit investment growth.



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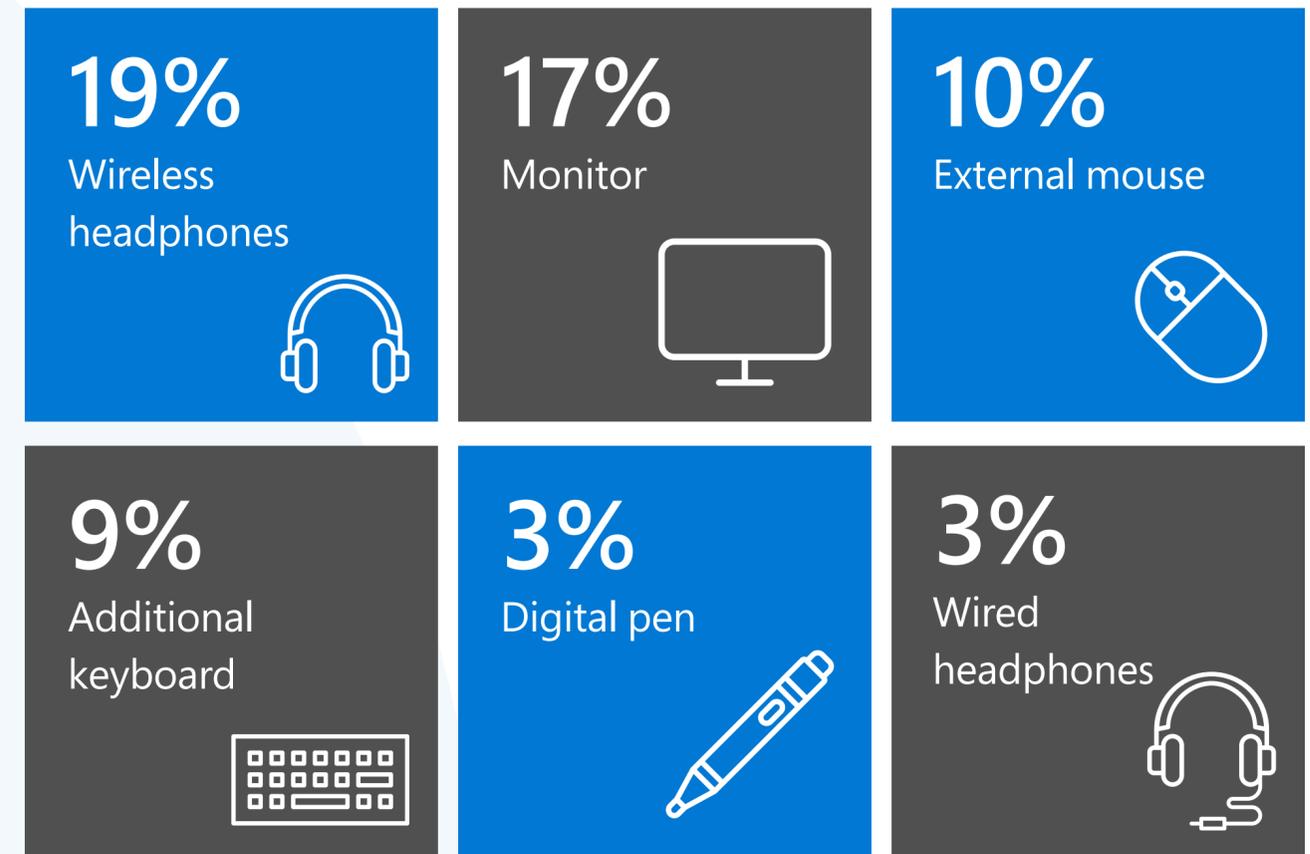
² Forrester Consulting: [Understanding the Role of Modernised PCs in Hybrid Work Environment Optimisation](#). A commissioned study conducted by Forrester Consulting on behalf of Microsoft, July 2021.

In addition to investing in new primary devices, ITDMs are also considering the peripherals needed to enhance the hybrid working experience. 30% of ITDMs believe accessories such as an external mouse (10%), spare charger (10%), or docking station (10%) are important to employees engaged in hybrid work. Jobs no longer require just a single device and employers must think about everything an employee needs to perform, from a wireless keyboard and digital pen, to headphones, earbuds

and webcams. This provision of a broader 'day-one kit' should now be considered for existing staff, when refreshing devices and when onboarding new staff.

Empowered with the budgets they need, IT teams can now start to examine which devices to deploy to support hybrid working in 2022 and beyond. However, IT teams must note employees' hardware expectations, as well as their frustrations with existing tools.

What would improve your home office when working in a hybrid way?



"The pandemic tested the last five years of our digital strategy. The future of hybrid work tests the next five. More so than ever before, the CDO is now also the Chief Experience Officer."

Andrew Wilson, Chief Digital Officer at Microsoft³

³ Information Technology & Security | Hybrid Quick Start Guide

Investing in new devices fuels productivity

With employees no longer limited to the office, it is vital for organisations to enable them to work productively, no matter where they are. Productivity can be undermined by unsatisfactory device performance, however, with 25% of employees with a work-related, company-owned device pointing to poor performance and processing speed as one of the top sources of frustration, when asked to choose up to three options. Another 15% are frustrated by battery life, and 14% by inadequate connectivity to the company network.

Again, these findings align with the Forrester Consulting study⁴, which found that 40% of business leaders view high processing speeds, long battery life, and reliable connectivity as the top employee requirements for new devices.

Devices with faster compute power, speed, and connectivity won't just address employee frustrations; they will also positively impact individual performance and business outcomes. More than a third (35%) of employees who received new devices since the onset of COVID-19 report a resulting increase in their productivity.

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Employees get a morale boost from new devices

Employees view new devices and their benefits largely through the lens of how well devices will enable them to do their jobs. With the majority having ‘made do’ with existing devices for some time now, almost 3 in 10 employees with a work-related, company-owned device surveyed (29%) say receiving a new device would make them feel more positive about their work and employer. Meanwhile, 16% say working on a newer device would increase their motivation.

Additionally, 61% of these employees say having the right device for their role helps

them maintain a healthy work-life balance, by supporting productivity. The message from employees is that they expect to be given efficient devices, not something that just about gets the job done, or slows them down as a result.

Adapting to this new way of working means everyone is already under more than enough pressure, so the last thing they want is to feel let down by the IT equipment and tools they’re given to do their jobs.

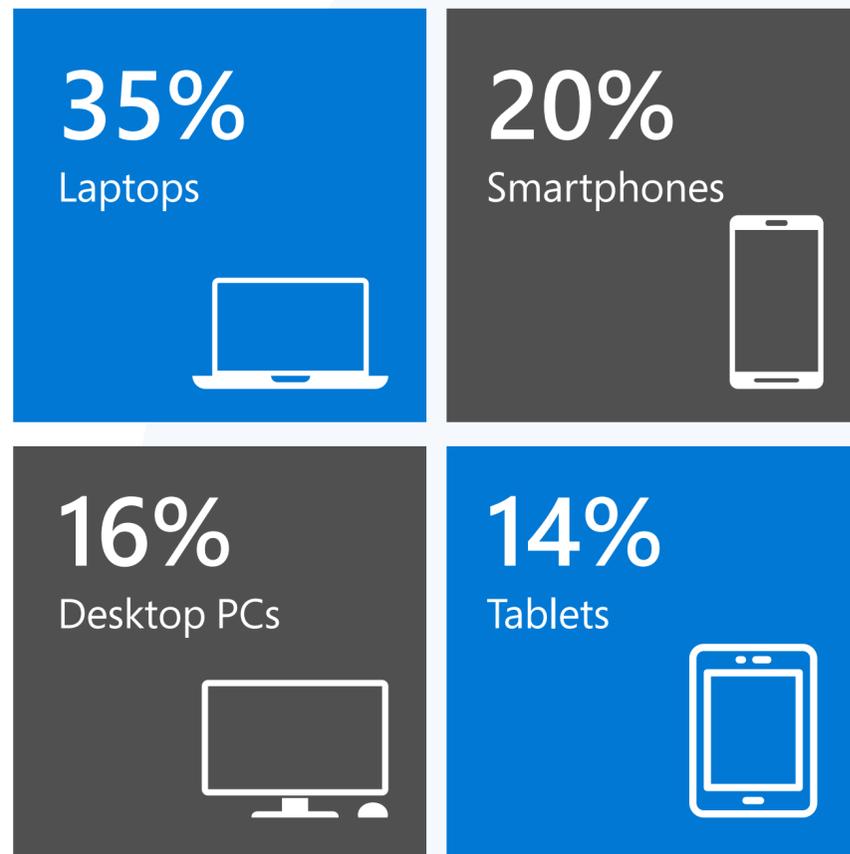
Empowering people to achieve greater productivity, means providing them with devices which perform as well as they do.

With the majority having ‘made do’ with existing devices for some time now, almost a third of employees surveyed (29%) say receiving a new device would make them feel more positive about their work and employer.

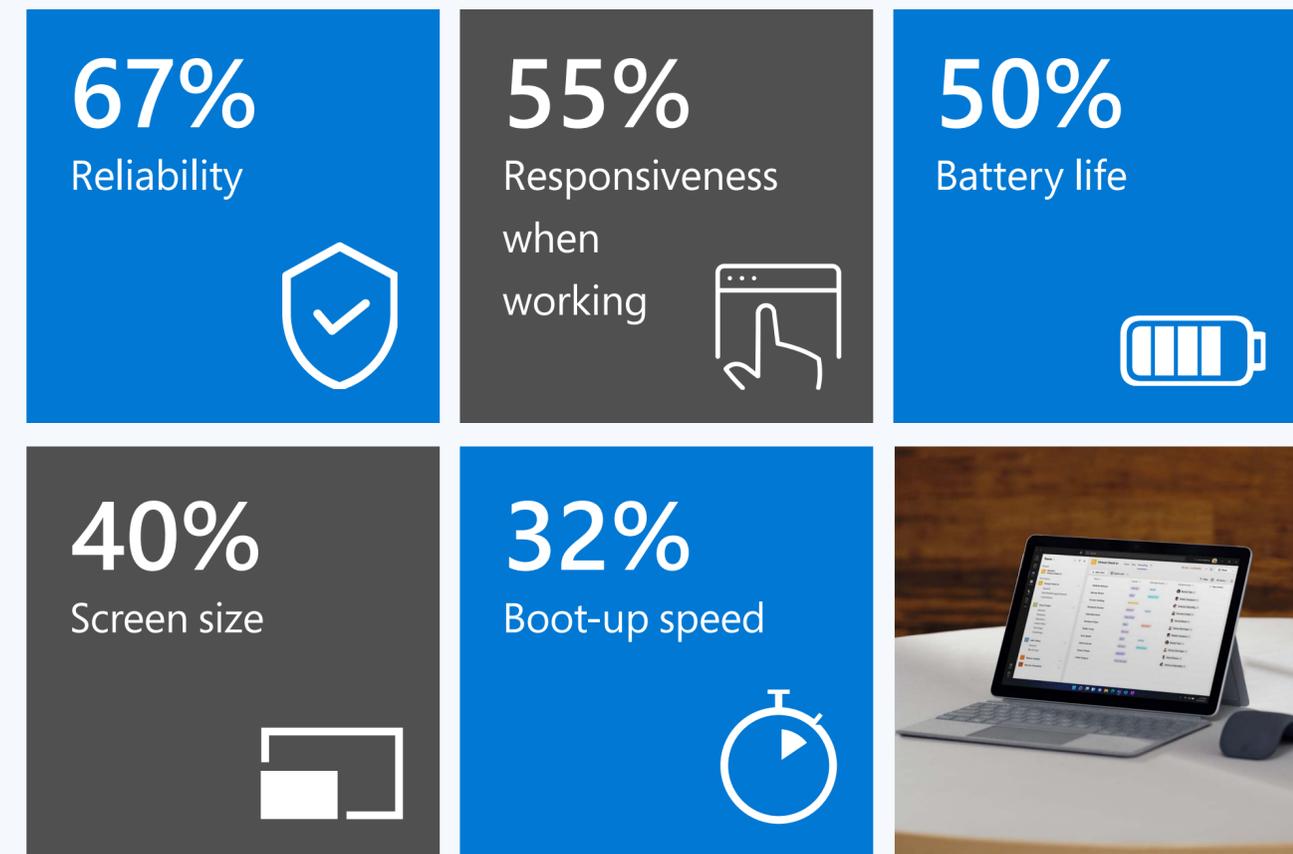
IT teams are focused on hardware reliability

With IT budgets largely established, how are ITDMs planning to invest their new resources?

More than half (55%) of ITDMs report their organisation is planning to invest in new devices in 2022 (amongst those devices listed in the survey), including:



When asked about the features they believe are most important to employees, when receiving a new device, ITDMs report the following priorities:



Looking ahead to 2022, 24% of ITDMs say keeping data protected on remote and hybrid devices is their biggest concern, while another 22% are worried about making sure infrastructure security is not compromised by hybrid working. A further 17% are concerned about providing consistent help desk support, wherever employees may be located.

ITDMs need to consider the individual needs of employees too

Overall, employees seem resigned to receiving whatever equipment IT teams decide to give them – a dynamic ITDMs appear to support. 42% of employees feel devices are decided by IT departments, according to their business needs or role, with 46% of ITDMs agreeing this is the biggest factor. There also appears to be some confusion among employees regarding the decision-making process, with nearly 3 in 10 employees (29%) being unsure how devices are allocated.

The data also reveals other disconnects between ITDMs and the employees they are supporting. Half (51%) of employees feel devices are provided based on job role alone – with individual requirements not considered as standard.

Only 31% feel their individual needs and accessibility requirements are taken into consideration, a number that drops to just 17% for frontline workers.

This is in direct contrast to how ITDMs feel. Nearly half (48%) of ITDMs say they consider all employees individually and take into consideration any accessibility requirements they have, when selecting the device and technology to provide. Only 25% report devices being based on job role as standard practice. Clearly then, there is room for improvement when it comes to alignment between the two groups, including better communication to staff about how device decisions are reached, and more opportunities for employees to say what they think they need, too.



Involving employees in device decisions leads to common ground

Despite these disconnects, the needs of employees and ITDMs are nicely aligned when it comes to the most important features of a new device.

The top six features, as reported by both groups when asked to choose up to five options, are the same:

	Employees	ITDMs
 Reliability	58%	67%
 Responsiveness when working	56%	55%
 Battery life	45%	50%
 Screen size	43%	40%
 Boot-up speed	36%	32%
 Light weight	30%	24%

The data suggests that if IT leaders make a point of surveying staff and soliciting their feedback on device requirements, they will discover significant common ground between what employees say they need and what IT wants to deliver. Involving employees in the process will help ensure their requirements are met, and it will also help them feel heard as new devices are rolled out.

Given the opportunity, one in four (24%) would like their IT teams to provide them with devices that perform faster, or are more powerful, showing employees have concrete asks for their IT departments, and are looking for the chance to discuss them.





Chapter two

Recommendations for hybrid work



Recommendations for hybrid work

Whilst the response to COVID-19 has transformed the way many organisations work, the data shows that digital transformation may not have reached the end user – employees – many of whom feel that IT takes a ‘one size fits all’ approach to device allocation. With budgets that reflect the transition to hybrid work now largely secured, ITDMs have an opportunity, and a mandate – to review their plans for a device refresh with a focus on optimising performance in hybrid environments.

Achieving this will mean taking on board the expectations of a newly mobile workforce. Employees across the UK are asking for devices that do more than just help them get by; they want technology that meets their individual needs, so that they can focus on what matters most to them.

“Surface devices have been an eye-opener. Our consultants really value the extra freedom – they can work wherever they are. Through COVID-19 it meant we could move seamlessly across from office environments to a home working environment without any disruption.”

Kevin Bulmer, Chief Technology Officer at Robert Walters

“If your desire as a team is to always work together on certain days in the office, you need to be quick and collaborative with other teams to book the space you need. I want to have more devices like the Microsoft Surface Hub as these would give me shareable collaboration space across locations, including people who are at home or somewhere else with the camera technology. I can move it around so that it either works off wi-fi or it is pluggable into multiple locations. With a space planning system, you will have the ability to divide up and allocate space on a flexible basis.”

CIO in the managed services and staffing sector⁵

⁵ Source: [Work Smarter to Live Better](#)

The following key principles will help ITDMs deliver on these expectations, and make the right decisions when considering new devices to support hybrid work:

Employees' needs should be a core consideration in IT purchasing decisions.

The nature of work has undergone a dramatic sea change and will keep changing for the foreseeable future. As UK organisations return to physical premises, leaders have an opportunity to shape the hybrid workplace of the future, one where individual roles, preferences, accessibility needs, and even personal lives are more considered. This will enable employees to perform at their best, no matter where they are. As such, mapping out employees' needs is a critical first step to ensure devices deliver what they need to, as well as improving the employee experience and perception of their employer.

Dialogue with staff should be prioritised and ongoing.

The future of work isn't about simply replicating old processes and approaches in a digital form. Once employers understand the new daily journeys and requirements of staff, they can build a workplace that engages and enables the workforce across multiple locations, while creating a safe and healthy environment, both online and offline. To achieve this, ongoing dialogue must take place, through channels such as employee surveys, virtual or physical suggestion boxes, or 'town hall' style meetings. ITDMs need a direct line to employees to hear their concerns and understand their needs, as they adapt to hybrid work.

Hardware upgrades and device refreshes should be viewed as more than a technical necessity—they're a powerful morale booster and potential recruitment tool.

Employees think differently about devices now. With the shift to hybrid working, devices are more critical than ever for job performance and so have a greater impact on employee experience and satisfaction. A new social contract accompanies this new way of working; employee expectations have changed, and a powerful new device can boost morale and appeal to talent.

The device experience should be 'democratised' wherever possible.

This report shows many employees believe device allocation to be based largely on seniority and role. To overcome perceptions of favouritism toward more senior employees, ITDMs should invest in devices that come in a range of form factors, allowing them to provide more choice for each employee's unique needs. While still delivering a consistent experience for all employees across all devices.





Chapter three Looking ahead



Looking ahead

Over the past year and a half, the world of work has changed dramatically, perhaps irrevocably, but one thing is certain: flexible work is here to stay. For hybrid work environments to be successful, devices must help people be productive, and enable collaboration with the right balance of power and performance. They also need to be versatile enough to work in different environments, while remaining highly secure.

As ITDMs look to deploy devices that support hybrid working in 2022 and beyond, aligning with employee needs is a vital first step. With so many possible working arrangements – in person, remote, in the field or some combination thereof – a ‘one size fits all’ approach to device allocation and deployment no longer works.

The data confirms that employees want devices capable of supporting their unique needs and circumstances. Having the right devices can lead to increased productivity,

better performance, and higher job satisfaction. ITDMs therefore need to think beyond the immediate technical requirements of device deployment and consider new technologies that will set employees up for long-term success in a hybrid world.

As hybrid models proliferate, we can expect to see 2-in-1 form factors continue to increase in popularity, as they provide the agility and flexibility needed for hybrid environments.

With Microsoft Surface, ITDMs have an opportunity to deliver 2-in-1 devices, alongside laptops and peripherals that meet new and heightened employee expectations, whilst simplifying deployment and management and extending advanced security across their infrastructure.

The latest devices from the Surface family, such as the Surface Go 3 and Duo 2, were designed with mobility in mind, as well as the new Surface Pro 8, which features a larger 13”

touchscreen and our most advanced display in a Pro. The entire Surface line is designed to keep employees engaged through immersive experiences, the latest processors, and features that allow instant, seamless, yet secure access. Helping them collaborate freely and more productively, whether at home, the office, or anywhere in between.

At Microsoft Surface, we are committed to supporting UK organisations’ transition to hybrid work and helping ITDMs confidently navigate this most opportune moment for hardware investment—to ensure their devices and tools are fit for today’s purpose, as well as tomorrow’s.



To learn more about the results of this study, or to speak with someone about sourcing tools to help your organisation successfully adopt a hybrid working model, visit [Microsoft Surface](#)

For a deeper dive into our product line up please visit [ExploreSurface.com](#)