

# Power Up Your Hybrid Workplace With Monitors

In 2020, disruptive forces pushed employees to learn how to work remotely. Research from last year revealed that shifting to a home office had a tremendous impact on employees as they grappled with changes in ways of working, modes of communication, and workstation equipment available to them.<sup>1</sup> More than a year later, and with the workforce in some countries starting to return to the office, one thing is clear: 2021 is seeing the rapid emergence of hybrid workspaces.

With working from anywhere becoming the new normal, decision-makers need to rethink the role of their organization's workplace, the technology provided to employees, and ways to equip them to be productive and able to collaborate efficiently from wherever they work. In that context, how are businesses transitioning from 2020 to make remote work sustainable? What is the future role of the office? What types of technologies do employees need to stay productive when working from different locations? And what is the value provided by monitors when working from different locations?

## KEY FINDINGS

Forrester's study yielded the following key findings:

- › **Organizations are redesigning workplaces for the new normal.** Employers recognize that their workforces are no longer confined to the office. They want to redesign the physical office to adapt to new models of work. Eighty-seven percent of them track office space utilization or plan to do so in the next 12 months. They are also actively seeking help, as 46% of organizations are partnering with third parties to rethink their office designs. Some have already implemented new models of work, with 34% of organizations leveraging coworking spaces to better support their hybrid workforces.
- › **Employees need technology and tools to work and learn from anywhere, but their employers are falling short.** Employees are embracing hybrid work modes as 71% of them want to be able to choose to work from anywhere they want. For that, 67% want to use more work-from-anywhere technologies. These needs are also driving the expansion of hot-desking, as 41% of organizations plan to implement the model in the next 12 months. However, a key challenge employees face when using hot desks is a lack of external monitors; only 35% of hot-desking workstations are currently equipped with one.



Dell Technologies commissioned Forrester Consulting to conduct custom research to explore how organizations are reinventing the workplace and the role of monitors in enabling sustainable hybrid working arrangements.

## METHODOLOGY

In this study, Forrester conducted two online surveys in April 2021: one with 302 business decision-makers with responsibility for workplace design, employee experience, and end-user hardware at their organizations, and one with 301 knowledge workers based in APAC, Europe, and North America.

## DEFINITIONS

This study distinguishes three types of workstation setups: home setups, office/onsite individual desk setups, and hot-desking setups. An office/onsite individual desk setup refers to individual workstations assigned to specific employees at their office premises. Hot-desking is the use of hot-desk workstations at the same premises. Hot desks are not assigned, and they are chosen on a first-come-first-serve basis. A coworking setup refers to using an external shared working space. This location is often provided and managed by a third party.

- › **Monitors are critical in enabling effective hybrid work across home, in-office, and hot-desk workstation arrangements.** Employees report that when working from home, having large monitors or a dual-monitor setup helps them be productive. Fifty-six percent of employees who report having a workstation setup that enables them to be productive while working from home have either a single monitor larger than 24 inches or a dual-monitor setup. This shows the importance of equipping employees' home workstations with the right monitors to empower them to get their work done. Where hot desks are implemented, organizations work on fixing employees' key pain points, with 65% of employers planning to provide a single monitor as part of their standard setups.



Companies must evolve their remote work policies into work-and-learn-from-anywhere strategies.

## The Age Of Hybrid Workspaces Is Here

Hybrid work is the new normal. Our research revealed that a third of the global workforce will be on a hybrid-working arrangement by the end of 2021 (see Figure 1). This means that although knowledge workers in some countries are starting to return to the office, the home will remain the dominant place for work. We also found that employees plan to increasingly work from external locations such as shared offices and public spaces. These new work habits are pushing organizations to transform their digital and physical workplaces. In surveying 302 business decision-makers in North America, Europe, and APAC, we found that organizations are:

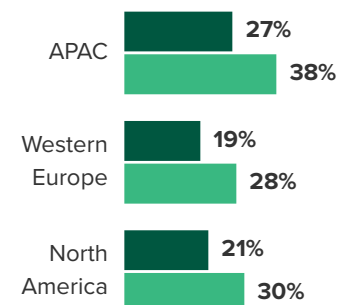
- › **Rethinking the role of their digital and physical workspaces for resilience and adaptability.** Employers recognize the workplace needs an overhaul to adapt to new models of work. Their immediate priority is to understand how the office space is being utilized, with 87% of organizations (and up to 92% of large enterprises) tracking office-space utilization or planning to do so in the next 12 months.<sup>2</sup> They are also actively seeking help: 46% of organizations are partnering with third-party experts to rethink their office designs. However, medium-sized companies are less likely to do so, as only 35% are partnering with a third party for help with their office designs.<sup>3</sup> Nonetheless, it is clear that employers are using office-utilization data and external support to reassess the role of the office and to inform their short-term return-to-work plans and long-term hybrid work programs.
- › **Retooling traditional office spaces to foster collaboration.** The traditional office is no longer perceived as a place to conduct individual work anymore. Instead, the primary function of the office of the future is to foster collaboration. Sixty-one percent of employees want their office space to have mostly collaborative spaces. In response, 78% of organizations have reduced or are thinking about reducing their office capacity in the next 12 months. Eighty percent have already shifted or are thinking about shifting existing office spaces to include other models such as coworking spaces (see Figure 2). So, while we expect the overall office space in central urban areas to decline in the coming years, the office space per employee is likely to increase.

Figure 1

“Please indicate the percentage of your workforce falling under each of the following working arrangement categories today, and how you expect this distribution to evolve in the next 12 months.”

**Hybrid** (employees working both from home and from the office at least once per week)

- Current (since the beginning of COVID-19 pandemic)
- In the next 12 months (i.e. by the end of 2021)



Base: 302 business decision-makers based in APAC, Europe, and North America with responsibility for workplace design, employee experience, and end-user hardware at their organizations  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, April 2021

› **Investing in technology to enable work and learn from anywhere.**

Research from last year has shown that organizations that invested in employee-productivity solutions over the past 12 months saw an average of 14% more in benefits in terms of cost savings or additional revenue than organizations that did not.<sup>4</sup> To reap these benefits, 77% of companies are prioritizing technology investment to enable work-and-learn-from-anywhere models.

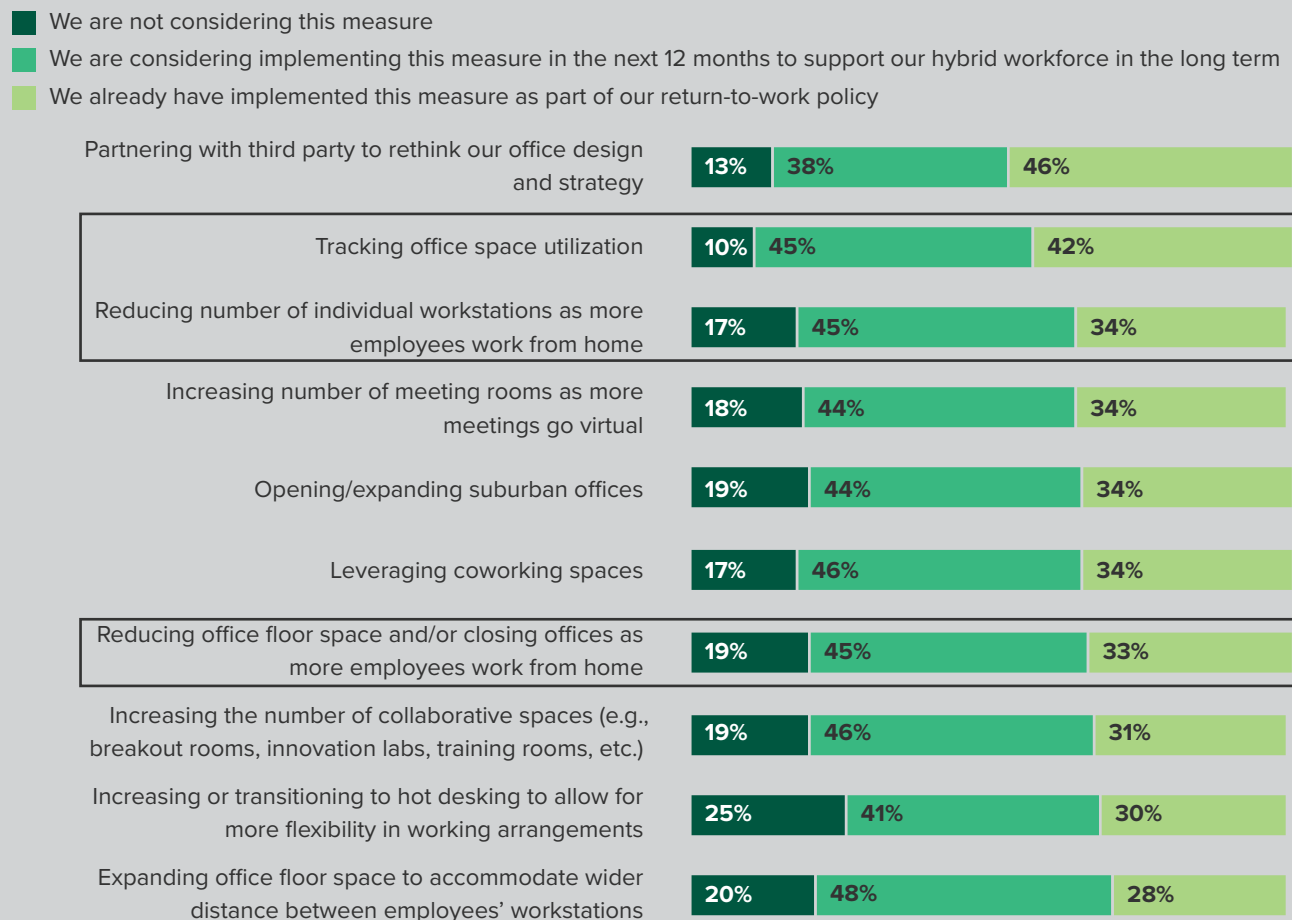
“We encourage employees to come to whatever office to cut down travel time. And, in each building, a few floors are open to hot-desking today.”

*CIO, e-commerce company, Japan*



**Figure 2**

**Please select which of the following measures have been implemented by your organization to allow a safe return to work and which will be implemented in the next 12 months to support hybrid workforce resiliency.**



Base: 302 business decision-makers based in APAC, Europe, and North America with responsibility for workplace design, employee experience, and end-user hardware at their organizations

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, April 2021

- › **Adopting hot-desking across office locations.** Research from last year revealed that 57% of organizations were planning to adopt or expand hot-desking over the next 12 to 24 months.<sup>5</sup> This trend is continuing in 2021, and hot-desking will become more prevalent in 72% of organizations. Thirty percent have already implemented hot-desking, and 41% will do so in the next 12 months. In APAC, only 16% of organizations have adopted hot-desking, which is the lowest rate among all regions. But APAC is showing the fastest-growing rate, with 50% of organizations planning to implement hot-desking arrangements in the next 12 months. Out of all the surveyed organizations that implemented hot-desking, 66% are adopting hot-desking heavily throughout their entire organizations, while the remaining 34% are only considering it at select office locations. To support these changes, 58% have developed a strategy regarding policies, technology, and support.
- › **Implementing new policies for sustainable work-from-home business practices.** Companies must evolve their remote-work policies into work-and-learn-from-anywhere strategies. Today, only 42% of organizations have put in place a working policy that supports hybrid work (48% in Western Europe, 44% in North America, and 35% in APAC). Worryingly, although APAC is the region with the highest proportion of employees on hybrid working arrangements, it lags when it comes to formalizing these arrangements with hybrid-work policies. APAC organizations must accelerate their deployment of long-term workplace hybrid strategies based on data and vision to provide clear guidance to their employees and to help them step into the future of work.

“We expect [about] 80% of our workforce to continue to work remotely. We’ve seen higher efficiencies, and we are reducing office space in the city to instead subscribe to coworking spaces.”

*Chief visionary officer,  
IT technology company,  
Germany*



## Employees Want More Flexibility And Tools To Work And Learn From Anywhere

As the line blurs between traditional and home office spaces, employees’ needs for flexibility and technology have increased. They are asking for an evolution of their workplaces and desk setups to foster collaboration and enable working and learning from anywhere. In surveying 301 knowledge workers based in APAC, Europe, and North America, we found that employees:

- › **Want to choose where they work from.** Seventy-one percent of employees expect more flexibility and want to be able to choose to work and learn from anywhere they want. This is particularly prevalent in Europe (82%) and in North America (78%). To support this, 67% of employees want to use more work-and-learn-from-anywhere technologies (see Figure 3).
- › **Face challenges at home that hinder their productivity.** Research from last year revealed that many workers find that their home offices are not well-equipped for productivity.<sup>6</sup> This trend continues in 2021 as one out of two employees face physical distractions when working from home that impedes their productivity (63% in North America, 54% in Europe, and 40% in APAC). Nearly half of the knowledge workers do not have a home setup that enables them to be productive (33% in APAC), and only 47% believe they have the right monitor to be productive while working from home (33% in APAC).



Only 47% of employees report having the right monitor to be productive while working from home.

“We replicated the office workstation at the users’ homes. We outfitted them with the same exact features, and [the same] look and feel, to mirror what they were familiar with.”

*CIO, automotive company,  
USA*



- › **Need the right home setup to be productive, feel empowered, and get their work done.** Our research found that there is a strong relationship between technology equipping a home setup and workers feeling empowered to get work done. Indeed, 63% of employees say the technology, tools, and devices they use determine the quality of their work experience.
- › **Have more freedom to select the right technology for them, but they demand greater support from their employers.** Thirty-nine percent of organizations allow employees to request a monitor from an IT catalog to be shipped directly to their homes, and 30% provide employees with the option to buy and expense a monitor for their home setup. But this is not enough. Only 49% of employees say they receive an adequate subsidy to install their ideal monitor setup at home and remain productive. This problem is most prominent in APAC, where only 20% of employees say the subsidies are adequate (vs. 69% in Europe and 65% in North America). Although nearly 40% of organizations do not provide or fund an external monitor for their employees' home setups today, there is a silver lining as 49% plan to do so in the next 12 months. This is again down to 23% in APAC, where organizations must accelerate their efforts to keep up with employees' expectations.

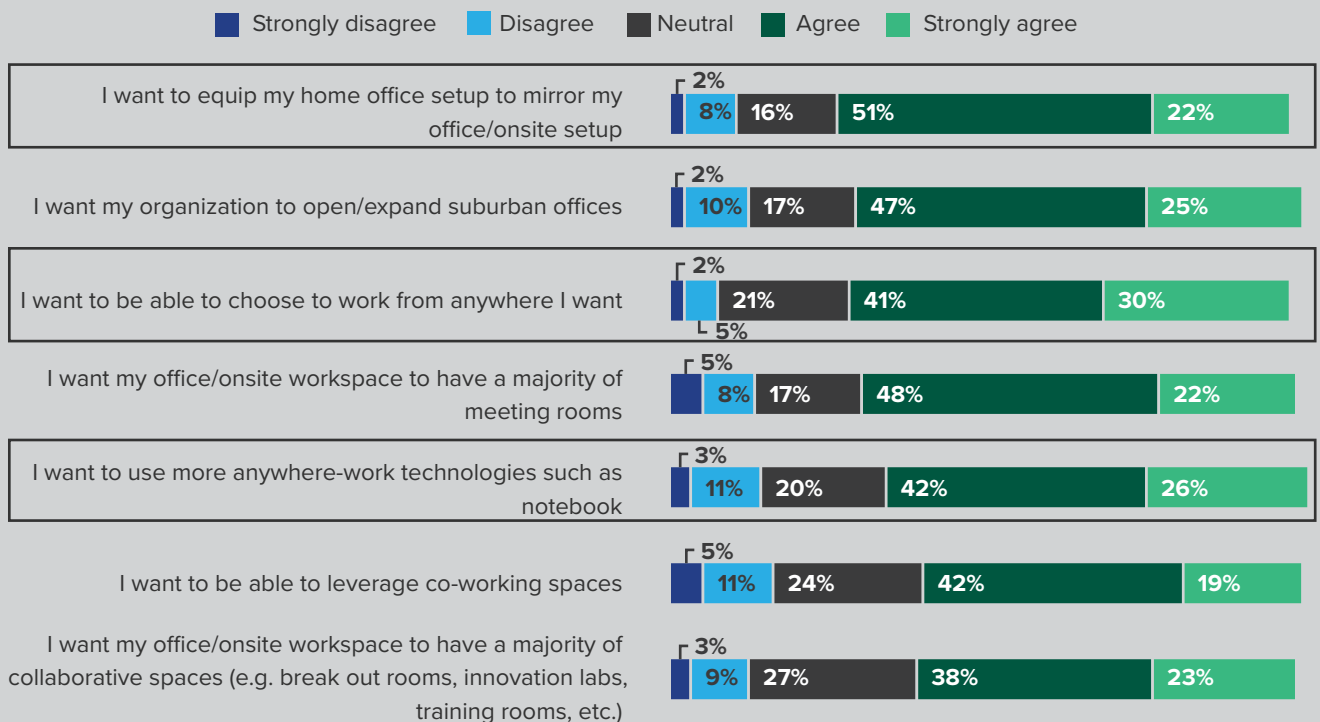
"We stopped commuting/travel allowance and gave subsidy for home improvement instead."

*CIO, e-commerce company, Japan*



**Figure 3**

**"If you had to describe your ideal future workplace, which of the following statements would you agree with?"**



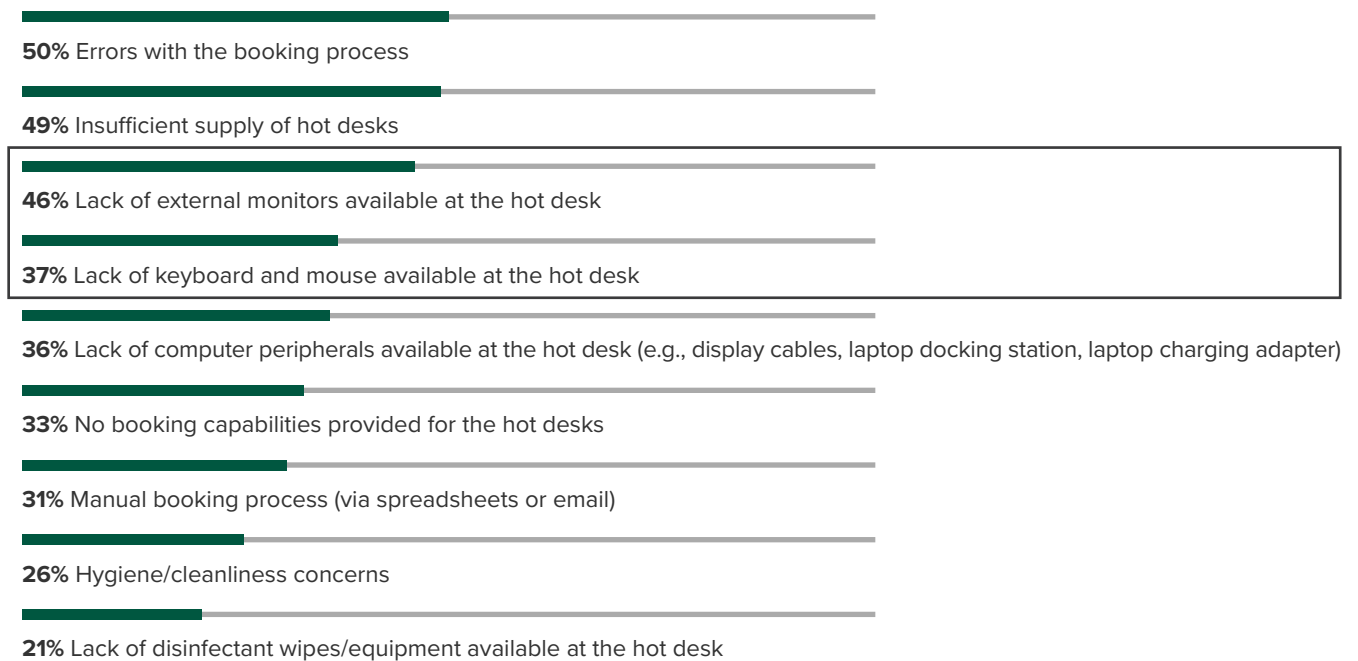
Base: 301 knowledge workers based in APAC, Europe, or North America.

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, April 2021

- › **Believe that current hot-desking arrangements are not equipped with the tools and technology they need.** With hot desks expected to be more prevalent, organizations need to be cognizant of their employees' needs and pain points. However, only 35% of hot-desking workstations are equipped with an external monitor today. This is not enough for 46% of employees who also report a lack of peripherals and accessories such as a keyboard and mouse (37%) as their top challenges when working at hot desks (see Figure 4). In addition, many organizations (36%) manage hot-desk booking manually (with spreadsheets or email), and 28% do so on a first-come-first-serve basis. This is the top pain point employees have when it comes to hot-desking arrangements.

**Figure 4**

**“You indicated having a hot-desking arrangement available at your organization. In your experience, what are some of the challenges and pain points associated with hot-desking?”**



Base: 154 knowledge workers based in APAC, Europe, or North America

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, April 2021

# Monitors Are Key Assets To Enable Hybrid Work

Organizations implement hybrid work at different degrees and in various forms. But regardless, it is critical to equip employees with the right technology for productivity and collaboration. Our research found that monitors are foundational assets to enable hybrid work – whether it is at a hot desk, at home, or at an individual workstation or worksite.



Organizations need to support hybrid working arrangements by providing their employees with the right monitors and home office tools.

## IN A HOT-DESKING SETUP ENVIRONMENT

- › **Organizations are investing in hot-desking technology, including monitors, to enable their new hybrid working models.** Organizations recognize that providing monitors and computer peripherals is key to an optimal hot-desking experience. Sixty-five percent will provide a single monitor as part of their standard hot-desking setup, 51% will provide a mouse, and 43% will make keyboards available in the next 12 months.
- › **Budgets for hot-desking monitors are increasing.** When equipping hot-desking stations, 82% of business decision-makers look at collaboration features (e.g., built-in cameras, microphones, speakers), while 75% want additional USB ports on monitors for employees to seamlessly connect to their laptops and accessories for their work. To meet these requirements, their budget allocated to the purchase of each external monitor for hot-desking stations is on average two to four times higher than for home setups or individual desks, with 85% of organizations allocating at least \$401 to equip a hot-desking station with a monitor. While overall IT budget has declined for 58% of organizations, more than one in three (35%) has increased its budget for monitors and home-office/work-anywhere technology.
- › **Organizations are prioritizing equipping hot-desking setups with larger and more monitors.** In a hot-desking setup, 89% of surveyed business decision-makers are thinking about providing three or more monitors, 60% are considering curved ultrawide monitors, and 49% are looking to provide a dual-monitor setup in the next 12 months. In contrast, just 16% of business decision-makers are thinking about equipping employees' homes with curved ultrawide monitors, dual-monitor setups (16%), or three or more monitors (16%) in the next 12 months.

## AT HOME

- › **Employees who have their ideal home setup feel they can collaborate, share, and access information more easily.** Empowering employees with their ideal home workstation has a direct impact on their ability to collaborate, access, and share information. Sixty-nine percent of employees who say they have an ideal setup at home also feel enabled to collaborate, access, and share information (versus only 23% of employees who do not have an ideal setup).

- › **Employees with a dual-monitor setup at home are more likely to be productive.** We found that employees who have a dual-monitor setup are more likely to have a workstation that enables them to be productive. Forty percent of employees who report having a home workstation that enables them to be productive are equipped with a dual-monitor setup. In comparison, 76% of employees who do not have a home workstation that enables them to be productive either have no monitor or a single monitor that is smaller than 24 inches. We also found that knowledge workers in APAC tend to have underequipped home setups in comparison to peers in North America and Europe, where large and dual-monitor setups are more common (see Figure 5).
- › **Organizations must account for collaboration features when making monitor purchase decisions.** Equipping employees' home offices to mirror their onsite setups is critical if organizations are serious about a hybrid work mode. We found that 71% of employees consider the monitors' collaboration features (e.g., built-in cameras, microphones, speakers) to be essential for an optimal home office setup, and 54% say the same about a dual-monitor setup.

## FOR OFFICE OR ONSITE INDIVIDUAL WORKSTATIONS

- › **Organizations are looking to provide in-office experiences that stimulate better collaboration among employees and foster creative thinking and innovation.** Employers are forced to combine the desire for increased collaboration with the need for stricter health and safety regulations. Top employers will provide employees with a modern office workspace to empower them to engage with other employees outside of a cubicle environment. Our research found that organizations are thinking about redesigning their workspaces and equipping offices with tools, technology, and devices to accommodate specific moments of collaboration rather than individual work. For example, we found that 46% of organizations plan to invest in large video screens in the next 12 months, and 42% will invest in digital whiteboarding technology during the same period. On the other hand, midsize companies are less likely to invest in collaborative technology and devices. Only 33% of these organizations plan to invest in large video screens, and 30% will invest in digital whiteboarding technology (see Figure 6).

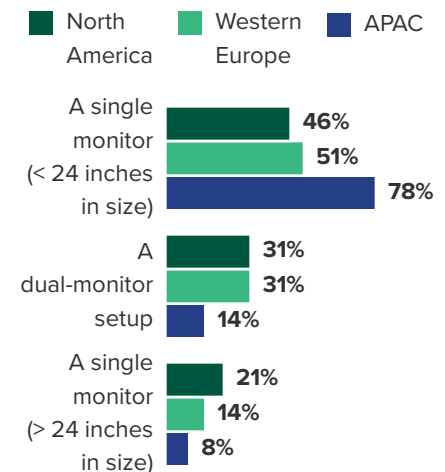
“Our employees do not have an assigned workspace or office anymore. They are instead floating between different offices and locations.”

*CIO, automotive company, USA*



Figure 5

“What does your monitor setup at home currently look like?”



Base: 301 knowledge workers based in APAC, Europe, or North America  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, April 2021

Figure 6

Key findings about equipping each work location



### AT A HOT DESK

- Monitors and computer peripherals are key for an optimal experience.
- Organizations are prioritizing equipping hot-desk setups with larger and more monitors.
- Monitor collaboration features and additional USB ports are the top features to look at.



### AT HOME

- Empowering employees with their ideal home workstations has a direct impact on their ability to collaborate, access, and share information.
- Employees with a dual-monitor setup at home are more likely to be productive.



### AT AN OFFICE INDIVIDUAL WORKSTATION

- Top employers will provide employees with a modern office workspace that fosters collaboration.
- Organizations are looking to invest in large video screens and digital whiteboarding technology in the next 12 months.

# Key Recommendations

The future of work just became today's reality. Work was already going to change due to consumer demand and business innovation. Now, the disruptive forces of 2020 and 2021 have compelled organizations to leap forward and enable hybrid workforces in a single bound. Investing in the right technology (including monitors) is crucial to enabling employees to work and learn from anywhere. Forrester's in-depth survey of 302 business decision-makers with responsibility for workplace design, employee experience, and end-user hardware at their organizations, and our survey with 301 knowledge workers based in APAC, Europe, and North America yielded several important recommendations, including:



**Listen to your employees to shock-proof your organization.** Do not assume you know better. Learn from your employees' expertise and show that you care about their input. Employees who are directly involved in and have influence over their work — and how they work — are more empowered and engaged. Augment surveys with actual observations and contextual interviews of your employees to better understand what improvements in their working styles and conditions would really make a difference in outcomes and how well those improvements are working out. Use employee journey maps to identify pain points in their daily jobs as well as opportunities to elevate their productivity when working across multiple locations. Based on these findings, decide which technology you should deploy and when.



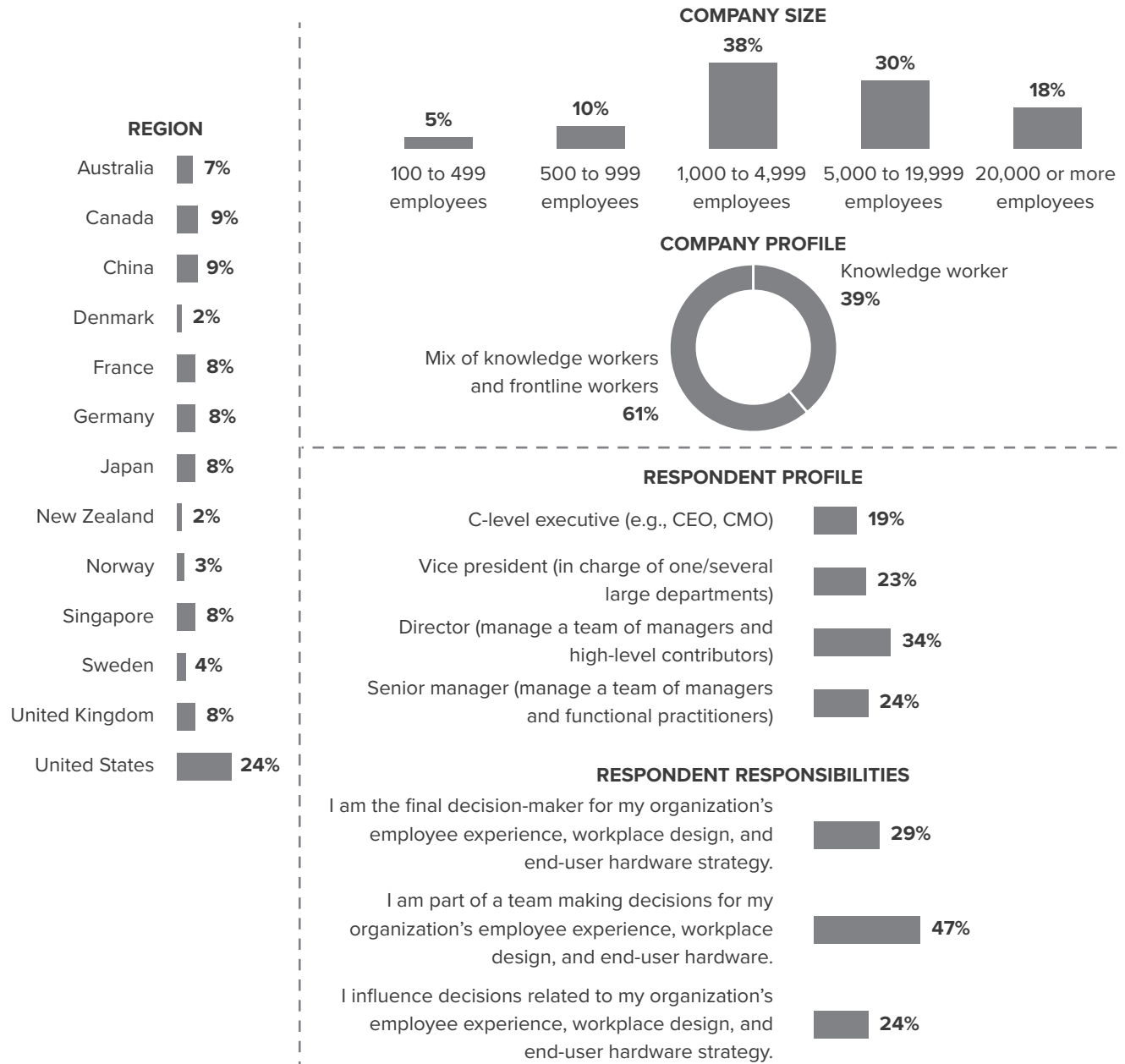
**Increase workforce flexibility and productivity with the right tools.** Employees are happiest when they make daily progress on the work they find most important.<sup>7</sup> Workstation technologies such as monitors enhance the productivity of individual employees. Give employees the freedom to choose the assets that best meet their needs. Consider how subsidies and feature guidelines for different use-case scenarios can help employees choose the right monitors.



**Equip workplaces for enhanced collaboration.** To engage employees, focus on making collaboration frictionless. Simplify the way employees access and share information across different locations. In office spaces, invest in large video screens and digital whiteboarding technology. At home, consider monitors with collaboration features such as built-in cameras, microphones, and speakers. For hot-desking, give employees the tools to manage their own experience, choose their seats, and the workstation features at those seats (e.g., monitors, etc.). Providing them with these work-and-learn-from-anywhere technologies will give them the autonomy to match their location to their activities, driving higher job satisfaction and better well-being.<sup>8</sup>

# Appendix A: Firmographics and Demographics

## FIRMOGRAPHICS

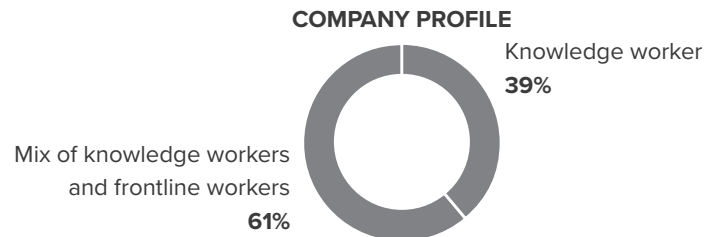
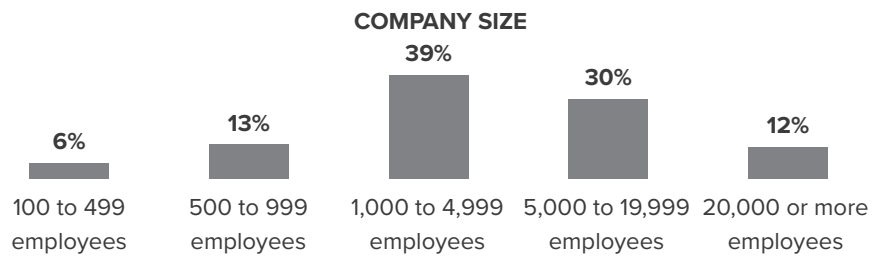
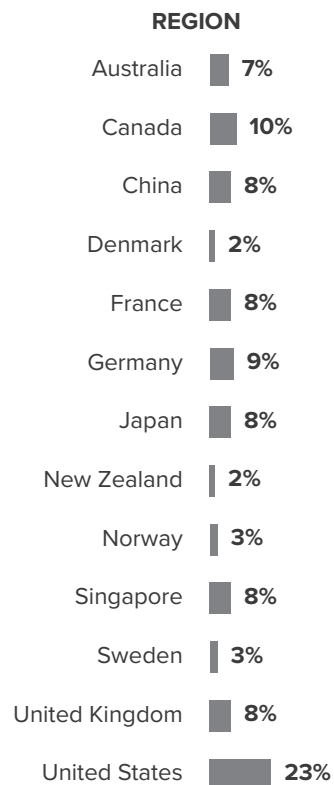


Base: 302 business decision-makers based in APAC, Europe and North America with responsibility for workplace design, employee experience, and end-user hardware at their organization

Note: Percentages may not total 100 because of rounding.

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, April 2021

## DEMOGRAPHICS



Base: 301 knowledge workers based in APAC, Europe, and North America.

Note: Percentages may not total 100 because of rounding.

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, April 2021

## Appendix B: Endnotes

<sup>1</sup> Source: “Optimize Your Hybrid Workforce With Flexible Work-From-Home Policies And Monitors,” a commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, July 2020.

<sup>2</sup> Forrester considers large enterprises to be firms with at least 5,000 employees. Commercial businesses have between 1,000 and 5,000 employees.

<sup>3</sup> Forrester considers midsize companies to be firms with fewer than 1,000 employees.

<sup>4</sup> Source: “How Monitors Deepen Your Employee Experience And Support Your Distributed Workforce,” a commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, July 2020.

<sup>5</sup> Source: “Optimize Your Hybrid Workforce With Flexible Work-From-Home Policies And Monitors,” a commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, July 2020.

<sup>6</sup> Source: Ibid

<sup>7</sup> Source: “Forrester’s EX Index: A Deeper Look At The Data,” Forrester Research, Inc., March 4, 2020.

<sup>8</sup> Source: “Hot Desks Or Ice-Cold Employee Experiences,” Forrester Research Inc., May 26 2021.

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