

A Custom Technology Adoption Profile Commissioned By Dell | February 2017

The Rise Of The Micro PC

Security And End User Productivity Benefits Drive Increased Micro PC Adoption

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Enterprise PC Buying Patterns Are Changing As Buyers Look To Improve Both Security And The Employee Experience At Once

As employee mobility increases globally and enterprise investments shift to tablets and laptops, organizations are assessing their ongoing investment in traditional PCs. One thing that remains clear is that enterprise PC buyers still value the security and performance offered by fixed computing solutions. They also say that new form factors like the micro PC help them deliver a **better experience to employees**, which they value at least as much as security.

PROJECT METHODOLOGY

- › Dell commissioned Forrester Consulting to conduct a custom study with 103 business and IT PC decision makers or influencers in North America. The study was completed in December 2016.



Respondent profile

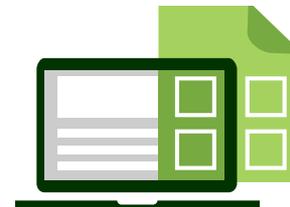
Custom survey of 103 managers responsible for PC strategy and deployment decisions

Region: North America



Title

- › 51% IT managers and above
- › 49% business managers and above



Implementation of PC devices

All respondents have at least one type of PC device implemented in their organization.



Company size

- › 19%: 2 to 99 employees
- › 42%: 100 to 999 employees
- › 39%: 1,000 employees and above

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When It Comes To Technology, IT And Business Leaders Prioritize The Employee Experience

Decision makers prioritize providing employees with the latest technology that is easy to use and that helps maximize productivity despite limited space.

- **Improving security** is the highest-priority initiative for decision makers, followed by making employees' **devices easier to use (60%)**.
- **Improving productivity by utilizing space and reducing clutter (54%)** is a top initiative, followed by improving employee satisfaction (54%).

ORGANIZATIONS ADMIT THEY LACK THE TECHNOLOGY AND WORKSPACES THEY NEED TO MAXIMIZE EMPLOYEE PRODUCTIVITY

- Only 27% strongly agree that the organization has designed a workspace to enhance the employee experience and that employees are completely satisfied with the usability of the technology provided to them.

How much of a priority are the following initiatives for your organization to improve the employee experience over the next 12 months?



Base: 103 IT and business professionals responsible for PC strategy and deployment within North America

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, December 2016

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Leaders Display Remarkable Awareness Of Employees' Demands And Challenges

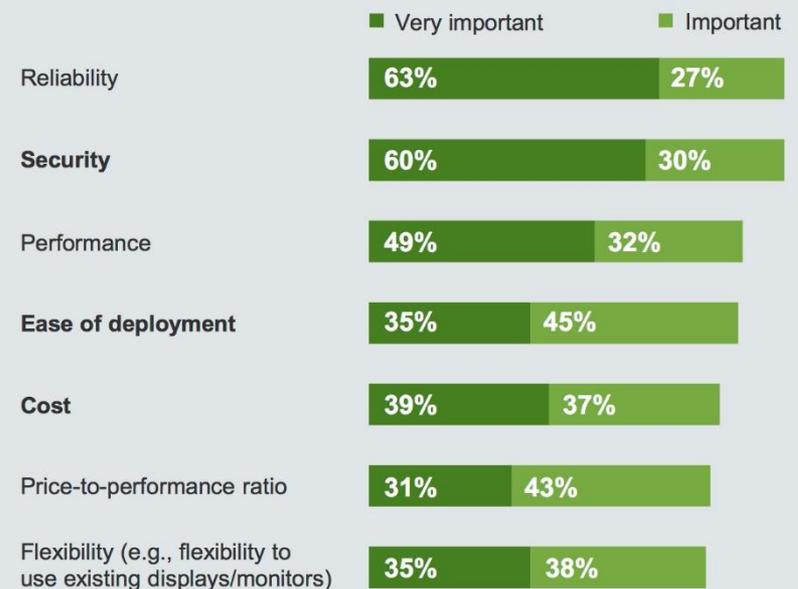
Both IT and business decision makers are tuned into the implications of technology on employees' productivity and well-being. Decision makers consider the following workflow factors when purchasing employee-facing technology:

- › Seventy-eight percent of IT decision makers consider how technology has an impact on the way employees feel; 76% prioritize the effort required by employees to use the technology.
- › Eighty-two percent of business professionals value technology's impact on employees' ability to focus on their work; 70% consider the impact on employees' workload.

WHEN IT COMES TO PC DEVICES, ORGANIZATIONS VALUE THINGS THAT ENHANCE THE EMPLOYEE EXPERIENCE

When evaluating PC devices, IT and business decision makers look for attributes that enhance the employee experience. **Security, cost, and ease of deployment top the list of PC buying requirements.**

How important are the following requirements when considering the primary PC device to deploy within your organization?



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Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, December 2016

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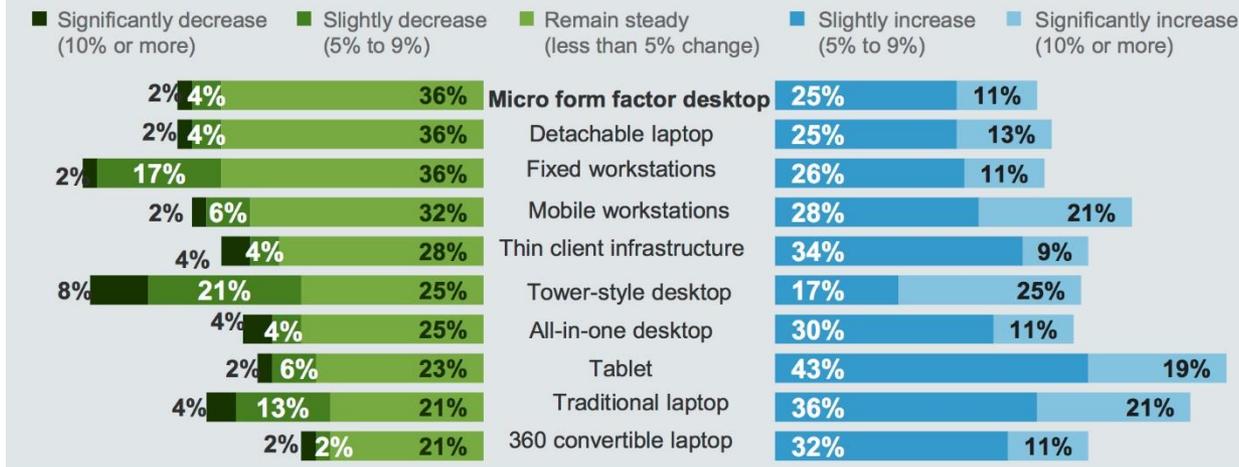
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Enterprises Value Fixed Computing Solutions

According to our study findings, modern mobility devices like tablets are steadily replacing traditional laptops, as these modern, remote access tools offer organizations better employee mobility. However, fixed computing still has a place, and we see organizations increasing spending on all-in-one and micro form factor desktops.

- Seventy-two percent of IT decision-makers are either maintaining or increasing the spend on micro PCs, outpacing traditional form factor spend.

To what extent do you expect your organization's annual spend on the following PC devices to change over the next year?



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Security Initiatives And IT Pain Points Drive Spending On Fixed Computing Devices

Security and cost remain critical purchasing considerations for organizations. As IT increases spend on modern mobility devices, its focus shifts to the security challenges with laptops.

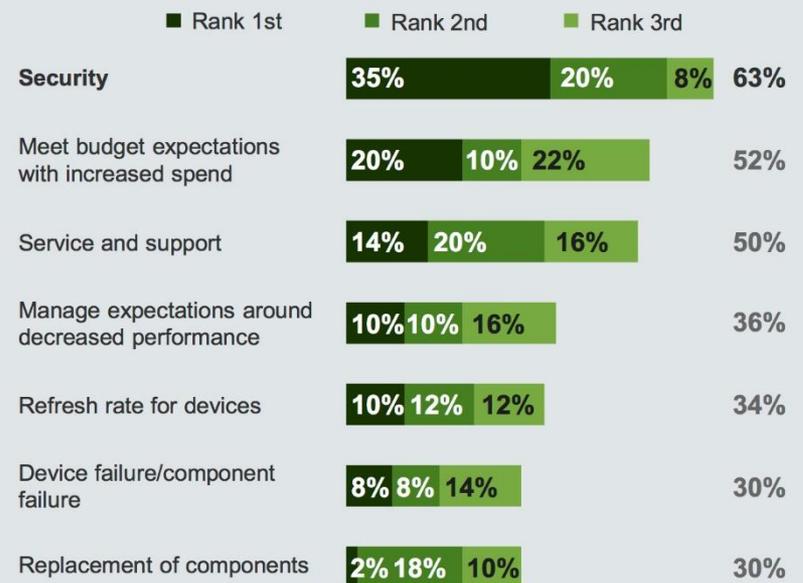
- › Sixty-three percent cited security as the top challenge with laptops. More than half of respondents experience challenges with the cost of these devices.

IT DECISION MAKERS VALUE THE INCREASED SECURITY AND FLEXIBILITY OF FIXED COMPUTING DEVICES

According to our study, 86% of organizations are more likely to invest in fixed computing devices when increasing security measures internally. This suggests that organizations perceive security as a key benefit of fixed devices. In addition:

- › Sixty-nine percent of organizations are more likely to invest in fixed devices when matching device type to employee use case.
- › Seventy-two percent indicated that piloting a new cloud workspace initiative positively affects spending on fixed computing devices.

You mentioned that your organization plans to maintain or increase spend on laptop devices. How challenging do you anticipate the following will be for your organization?



Base: variable IT and business professionals responsible for PC strategy and deployment within North America

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, December 2016

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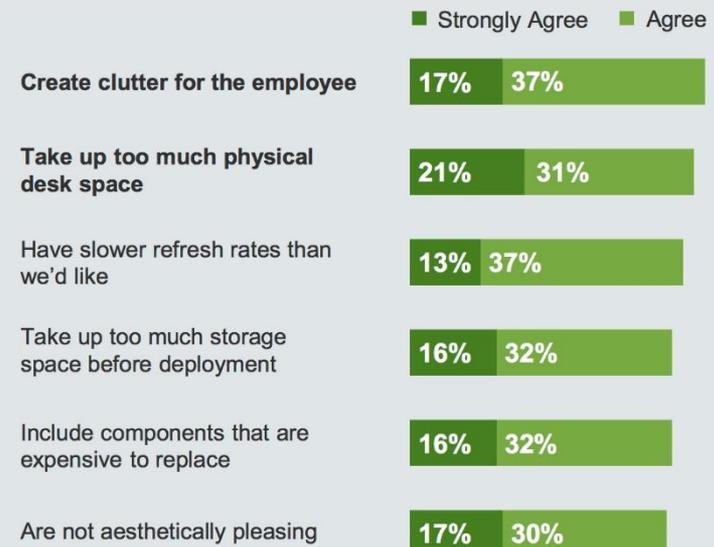
Traditional Fixed Computing Devices Create Challenges For Employee Productivity

Decision makers view clutter and desktop space as primary challenges with desktop PCs. These challenges interfere with employees' daily cognitive flow and impede a positive employee experience.

- › Fifty-four percent of organizations agree or strongly agree that fixed computing devices create clutter for the employee.
- › Fifty-two percent agree or strongly agree that these devices take up too much physical desk space.

Thirty-four percent of decision-makers agree or strongly agree that their current stationary PC devices lack usability.

Please select your level of agreement with the following statements as they relate to the experience you have with your current deployment of fixed computing devices. "Our current stationary PCs . . ."



Base: 103 IT and business professionals responsible for PC strategy and deployment within North America (select variables shown)
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, December 2016

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Micro PCs Are An Appealing Choice For Fixed Computing Needs

Micro PC devices provide an attractive alternative to traditional tower-style desktops, freeing up desk space and reducing clutter. **Fifty-eight percent of firms have either implemented, are expanding implementation of, or are planning to implement micro PCs.** Comparatively, 42% of decision makers are planning to increase spending on tower-style desktops in the next year.

What are your plans to implement a micro PC device?



*Don't know not included

Base: 103 IT and business professionals responsible for PC strategy and deployment within North America

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, December 2016



A micro PC is defined as having the power and performance of a full desktop, but it is about the size of large book — typically 7" H x 1.5" W x 7" D.

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Micro PCs Deliver Full Desktop Performance And Improve Usability

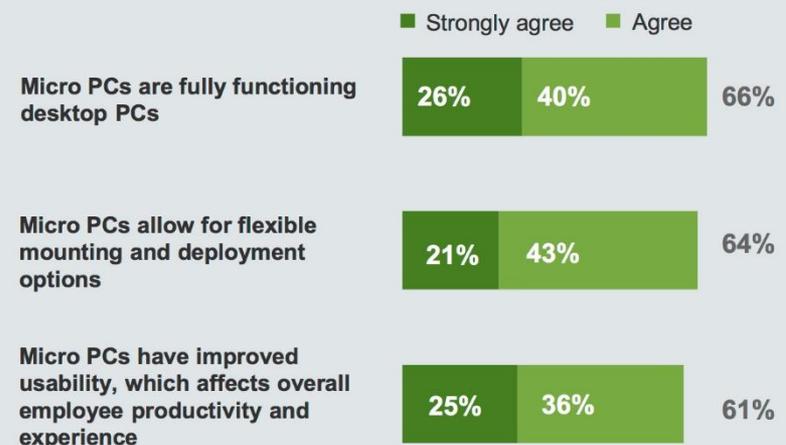
Micro PCs offer the performance and security of a fixed computing device while improving user productivity and space utilization.

According to study findings:

- **Sixty-six percent of IT decision makers agree that micro PCs are fully functioning desktop PCs.**
- **Sixty-four percent agree that these devices allow for flexible mounting and deployment options, removing the clutter and deployment challenges associated with traditional tower-style desktops.**
- **Sixty-one percent of IT decision makers agree that micro PCs offer employees improved usability.**

Eighty-one percent cited performance as an important or very important requirement in PC buying decisions; 80% cited ease of deployment as important or very important.

To what extent do you agree with the following statements regarding micro form factor PCs?



Base: 53 IT professionals responsible for PC strategy and deployment within North America

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, December 2016

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Deployment Of Micro PCs Satisfies IT Demands While Improving Productivity

Implementation of a micro PC creates an environment that encourages employees to think and behave in a more productive way.

- › Fifty-four percent of decision makers cited clutter as a top challenge of desktop PCs. Reduced clutter for employees is the No. 1 benefit of a micro PC device.
- › While decision makers cited overuse of physical desk space as a top challenge of desktop PCs, ergonomic improvements and space savings stand within the top five benefits of a micro PC device.
- › Ease of deployment rises to the top of the list of PC buying requirements; flexibility of deployment is a key benefit of implementing a micro PC.
- › Eighty-six percent of organizations are more likely to invest in fixed computing devices in order to increase internal security. As a fixed computing device, micro PCs offer the security that companies demand.

Which of the following benefits have you realized from a micro PC device?



1

Reduced clutter for employees



2

Reduced costs



3

Reduced downtime



4

Ergonomic improvements, space savings



5

Flexibility of deployment



6

Improved technology resources for employees

Base: 49 IT and business professionals responsible for PC strategy and deployment within North America with a current implementation of a micro form factor

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, December 2016

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Conclusions

Now is an excellent time to refresh the vision of the desktop PC in your organization.



Security and employee experience improvements are a top priority for enterprise PC buyers.



Improved employee experience and IT benefits drive an increase in micro PC adoption.



72% of organizations have implemented, are expanding implementation of, or plan to implement micro PCs.



61% of organizations improved usability with a micro PC, improving their user productivity and experience.

ABOUT FORRESTER CONSULTING

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