The Future of Work and Digital Transformation

March 2021

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Objectives & Methodology

OBJECTIVES

Understand the behaviors and attitudes of current Business End Users (BEU) and IT Decision Makers across all business sizes who have been forced to work from home (WFH) due to Covid-19:

- What are the challenges of WFH?
- What collaboration tools are being used?
- How satisfied are they with their job with the WFH transition?
- Where do BEUs want to work once Covid-19 is no longer a concern?
- How have tech issues impacted BEUs WFH?
- How has Covid-19 impacted the business model, services used, and security concerns by ITDMs?
- What investments in digital solutions have been made by ITDMs?
- ITDM Interest in DaaS model

METHODOLOGY

- Quantitative online survey, 10-minutes
- Fielded to external panels
- **Fieldwork**: Jan. 15th – Feb. 11th, 2021
- Total and Business End User /IT Decision Maker data is weighted. Individual market data is unweighted
- **Stat testing**
- ▲▼ shown for significant differences in business sizes
- All stat testing done at 95% confidence level. Not shown for base sizes <50

SAMPLE

- Business End User (BEU): currently working from home and worked in the office prior to Covid-19
- IT Decision Makers (ITDM): if their company has made policy changes/work location changes due to Covid-19 at any point since March 2020

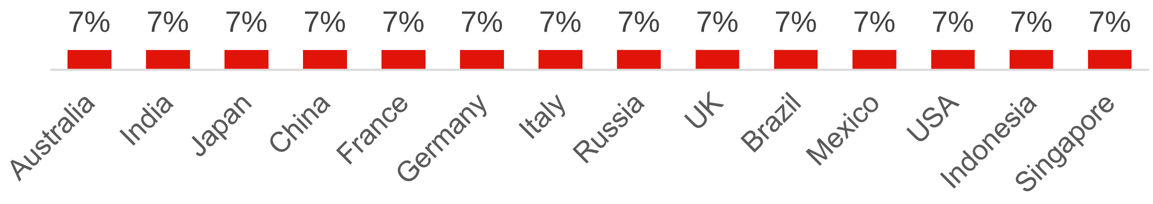
TOTAL	**n=8,533**		
Australia	n=596	Italy	n=625
Brazil	n=600	Japan	n=609
China	n=600	Mexico	n=613
France	n=627	Russia	n=600
Germany	n=622	Singapore	n=613
India	n=600	UK	n=600
Indonesia	n=610	USA	n=618

n=~75-100 per business size per market
(Very small/small, Medium, Large)

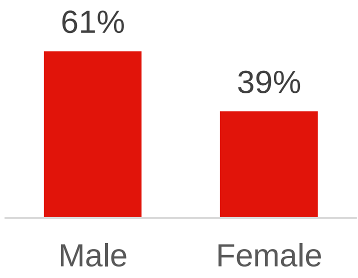
Respondent Profile

Total

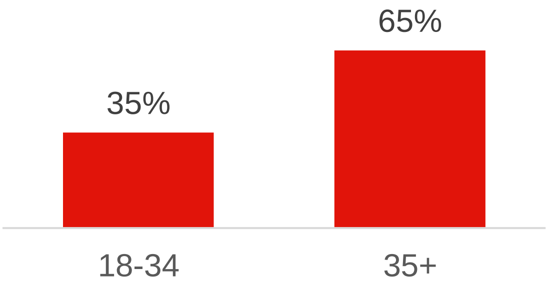
Market



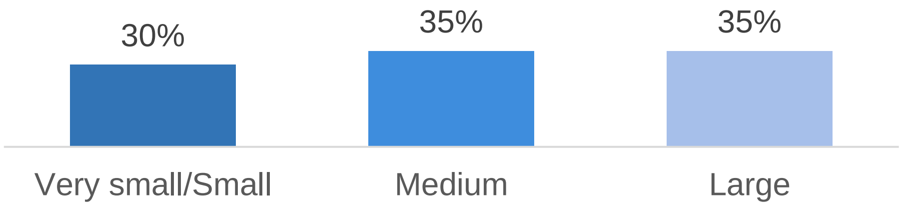
Gender



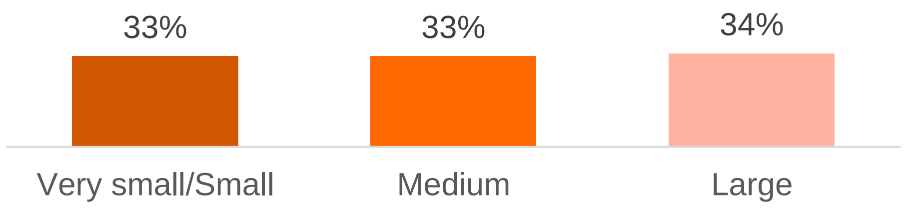
Age



Business Size | BEU



Business Size | ITDM



Base: Total (n=8,533)
Base: Gender & Age (n=8,493)
Base: Total BEU (n=4,126) | Base: Total ITDM (n=4,407)

Lenovo

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Response to WFH/Covid-19 (BEUs)

Business/workplace changes due to Covid-19 (ITDMs)

WFH wardrobe/collaboration tools (BEU + ITDMs)

Digital transformation (ITDMs)

DasS - Device as a Service (ITDMs)

Key Findings

1. Many of the ways that workplaces have transformed in response to the pandemic are here to stay. It's fair to say that the **office as we knew it is gone**

2. Workers are in a groove with working from home now and feel **it's a net positive** situation compared to their previous traditional office routine.

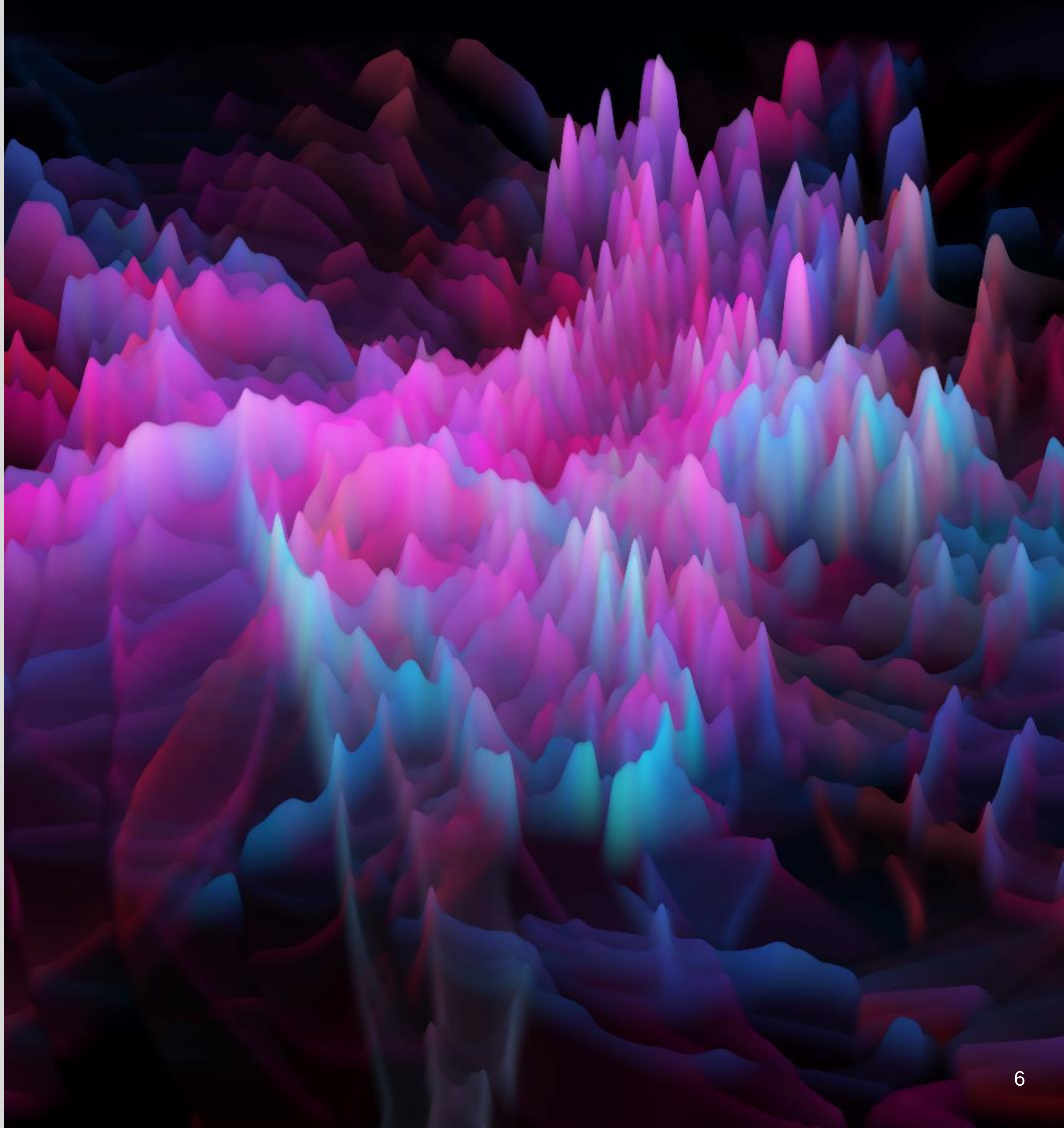
3. Part of what's making this work is the **wide adoption of collaboration software**, something nearly all companies have adopted. **Zoom** is the most used, followed by **Microsoft** (Teams, Office 365) and **Google** (Meet, Docs).

4. One piece of tech that's being used more is the smartphone, with the **majority using their phone for work purposes**. It's being used most frequently as a way to **communicate within their teams**, likely due to the increase in collaboration tool usage

5. There is **significant interest in DaaS**, more so in Medium and Large companies, who see its top benefits as **freeing up time** for more strategic projects and keeping **hardware up to date**

Response to WFH/Covid-19

Employees

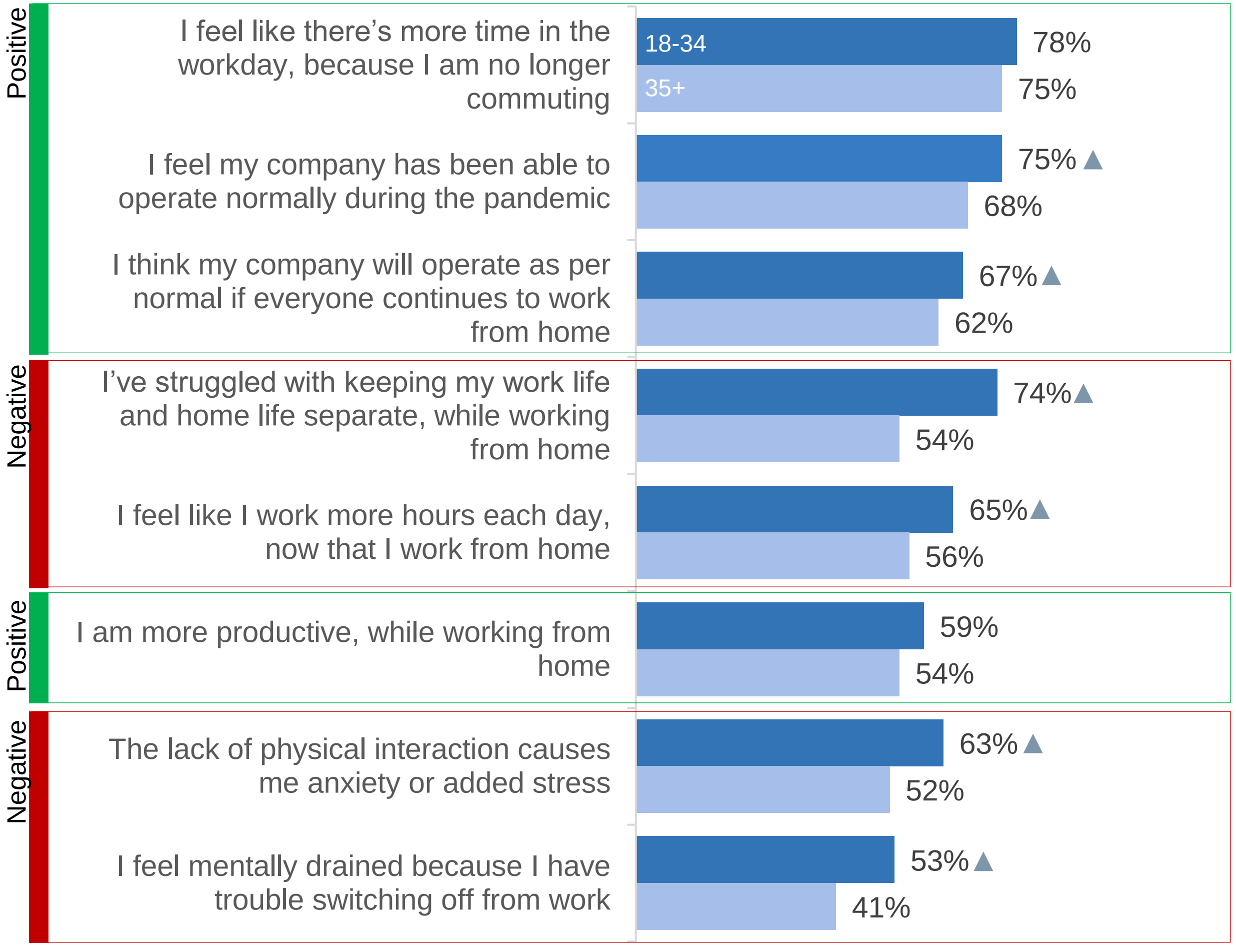


BEUs of all ages are satisfied with their job while WFH. Younger BEUs struggle with work-life balance, but also appreciate the flexibility of WFH policies

BEU

Agreement Levels of Working During Covid-19

Strongly/Somewhat agree



WFH Job Satisfaction

Strongly/Somewhat agree

18-34 73%

35+ 69%

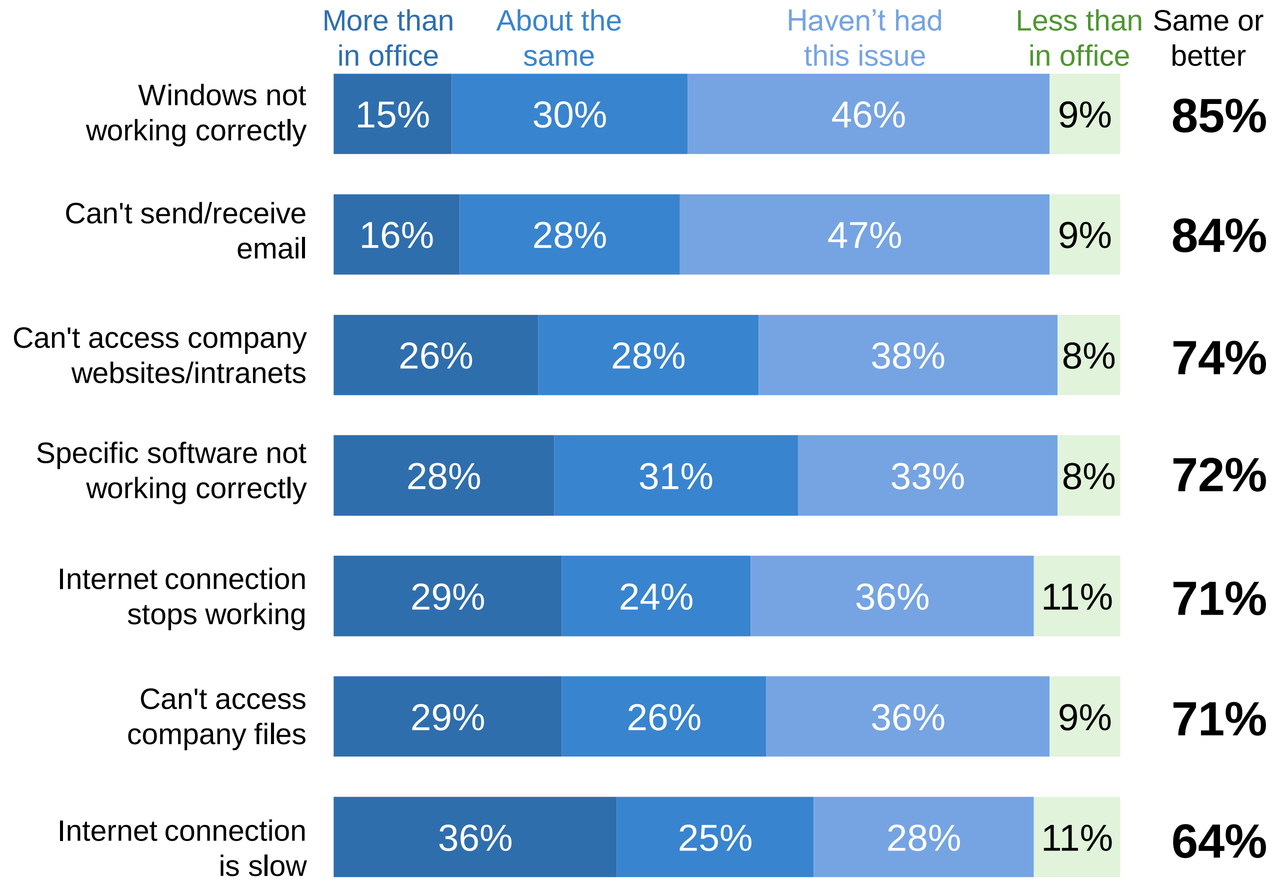
Base: BEU Aged 18-34 (n=1,452), Age 35+ (n=2,638)

Working from home has not brought on a host of tech issues, and those that workers have tend to be connection based which is only a moderate or non-issue

BEU

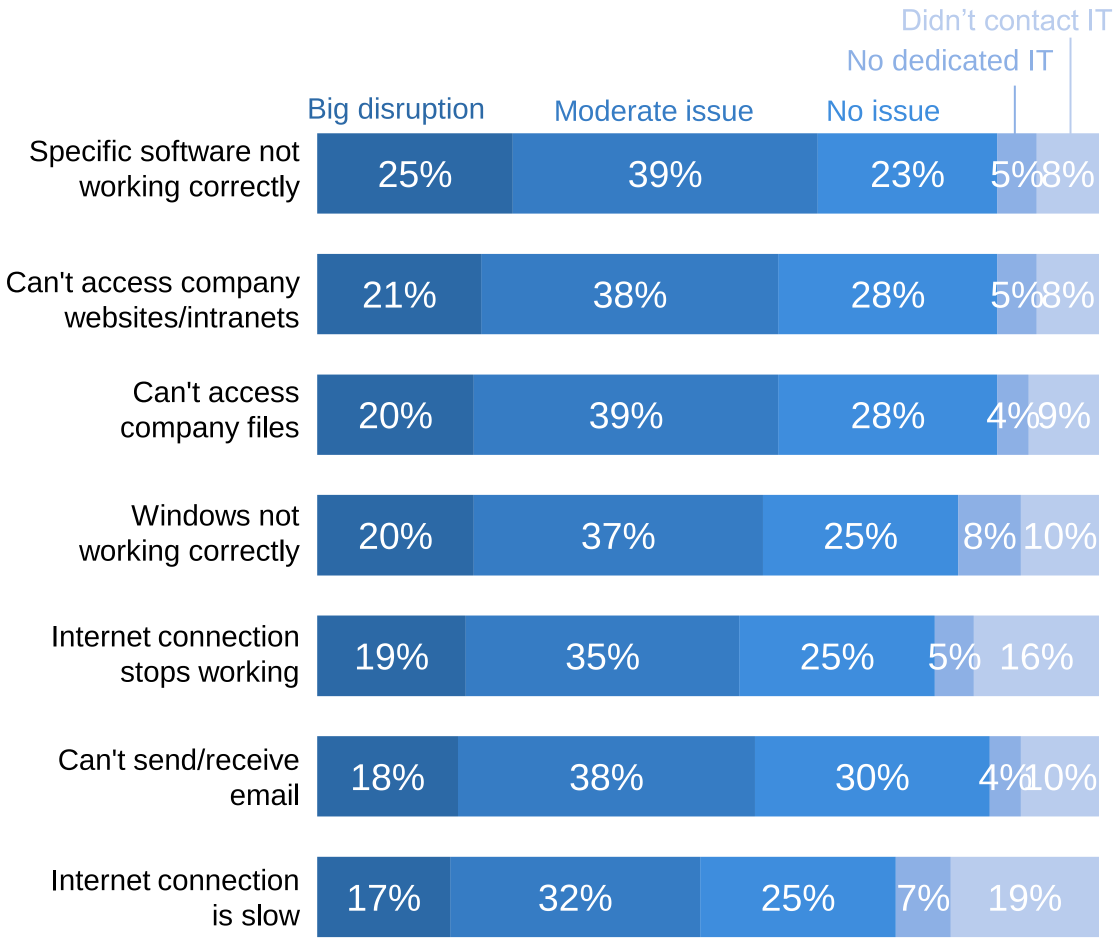
Cadence of Tech Issues/Problems WFH

Total BEU data shown



Severity of Tech Issue Disruptions While WFH

Total BEU data shown – Omitting those that haven't had that issue



Market differences: Indonesia and India more difficulty across all issues for all business sizes; Mexico also more difficulty on many tech issues but only in large businesses; similarly Singapore reports more difficulties but only in medium businesses

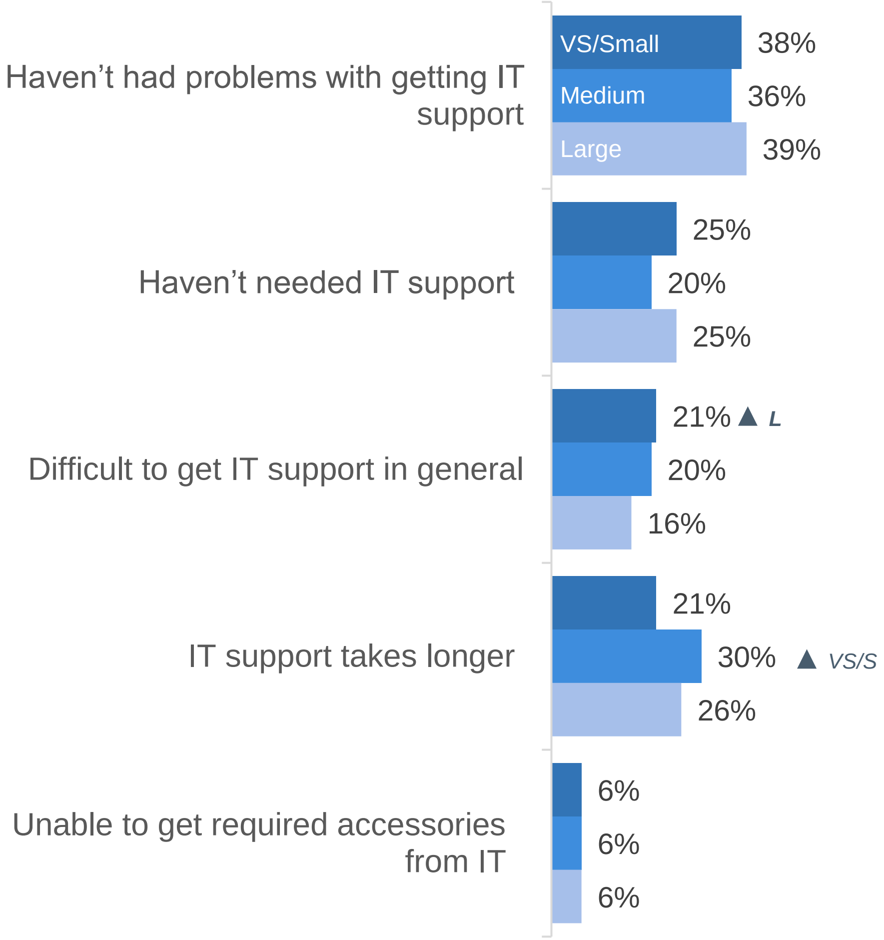
Base: BEU Total (n=4,126); See slide notes for individual base sizes for Q6

Over a third of BEUs across business sizes haven't had issues with IT support while WFH. Those that have, sometimes it takes longer or is simply difficult to get at all

BEU

IT Assistance Experience While WFH

Total BEU data shown



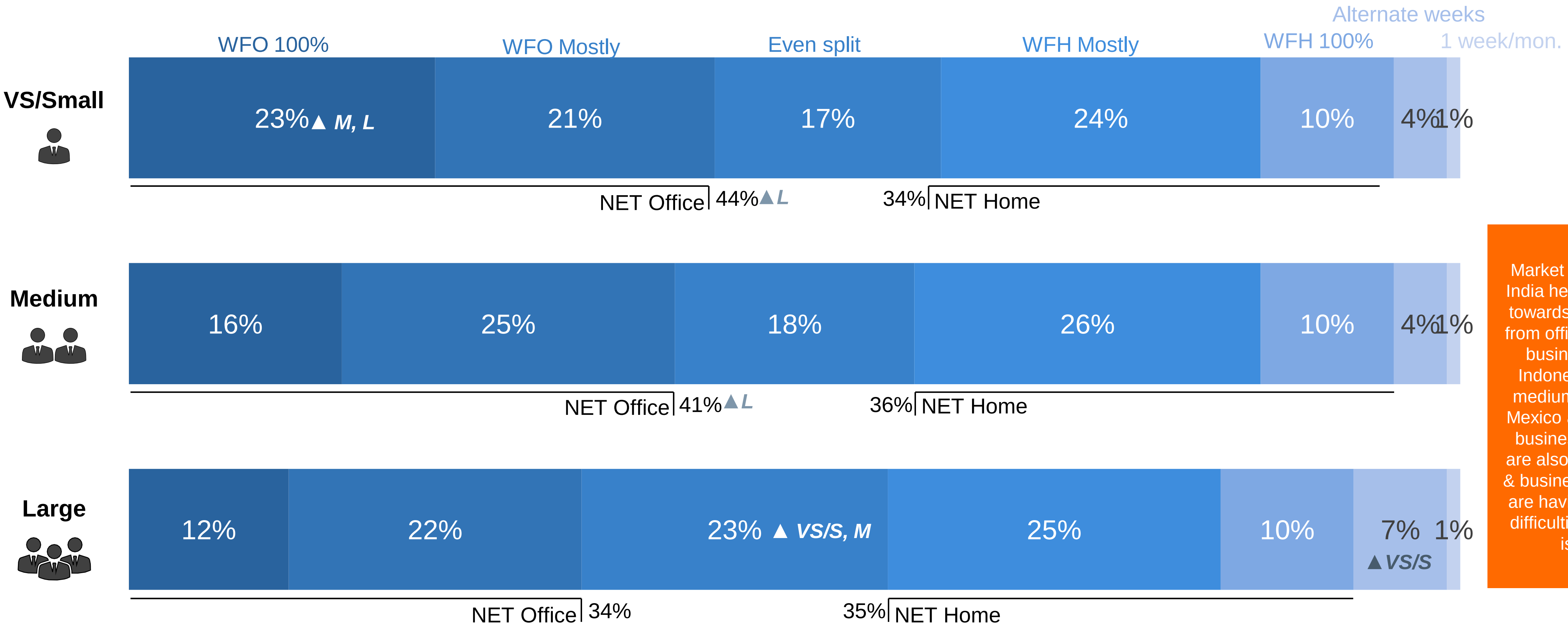
Market differences: VS/S in China report fewer issues with IT support; India and Indonesia having significant difficulties in medium and large businesses

Base: BEU VS/Small (n=1,227), Medium (n=1,450), Large (n=1,449)

Very few employees want to go back to a daily office routine, with most preferring at least an even split with working from home

BEU

Work Location Preference without Covid-19 Issue



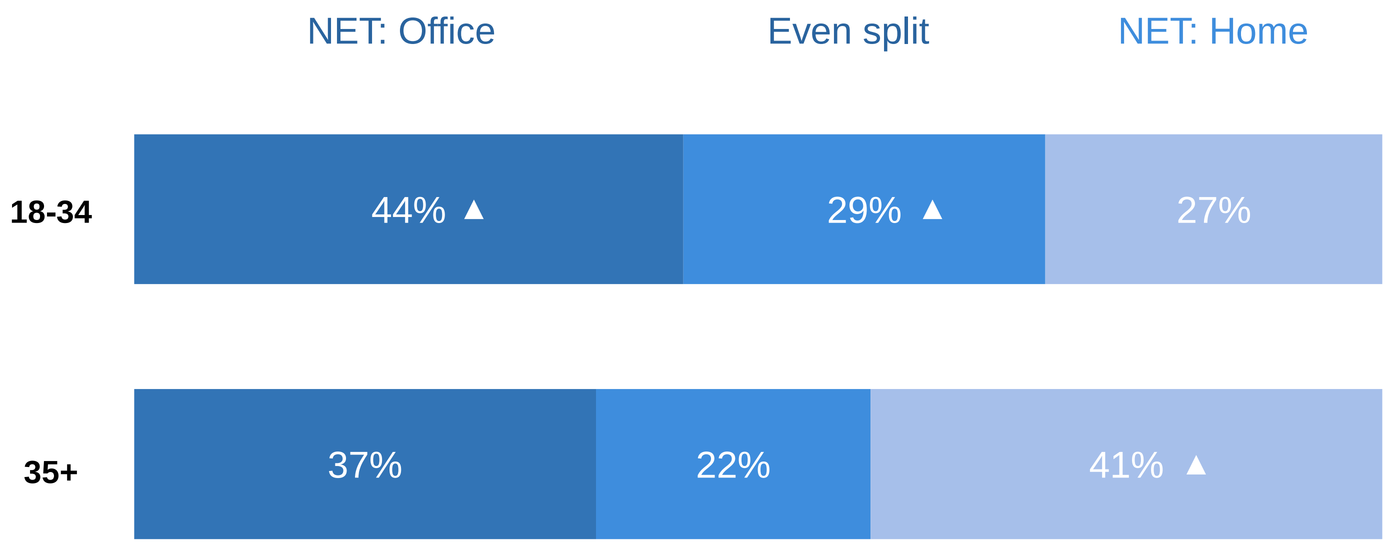
Market differences: India heavily leaning towards 100% work from office across all business sizes; Indonesia among medium and large; Mexico among large businesses; these are also the markets & business sizes that are having the most difficulties with tech issues

Base: BEU VS/Small (n=1,227), Medium (n=1,450), Large (n=1,449)

Majority of employees prefer to continue working from home. Younger employees are more likely to be among those who prefer to work primarily in the office

BEU

Work Location Preference without Covid-19 Issue

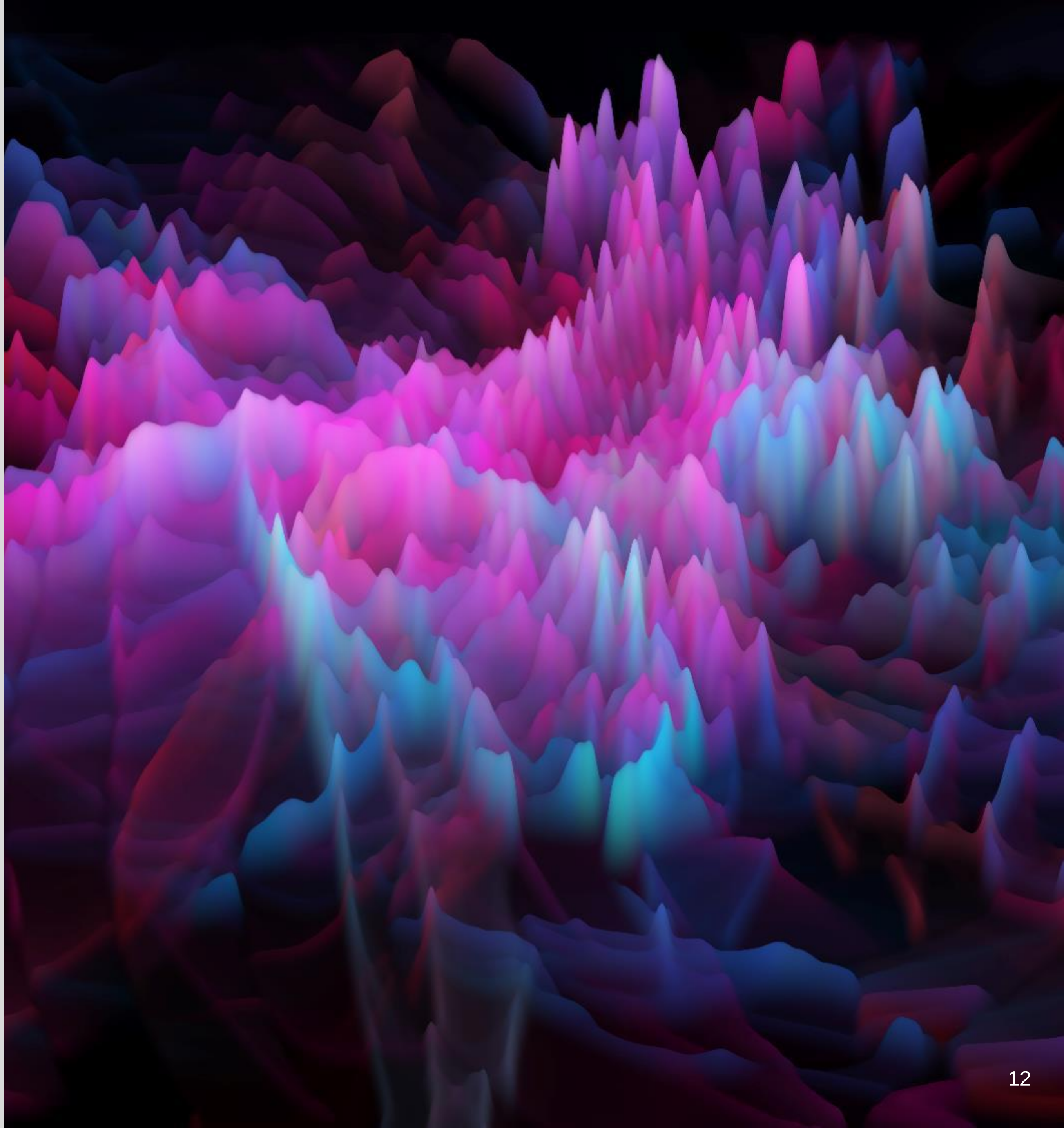


Note: NET Office consists of WFO 100% and WFO Mostly; NET: Home consists of WFH 100% and WFH Mostly

Base: BEU Aged 18-34 (n=1,452), Age 35+ (n=2,638)

Business/ workplace changes due to Covid-19

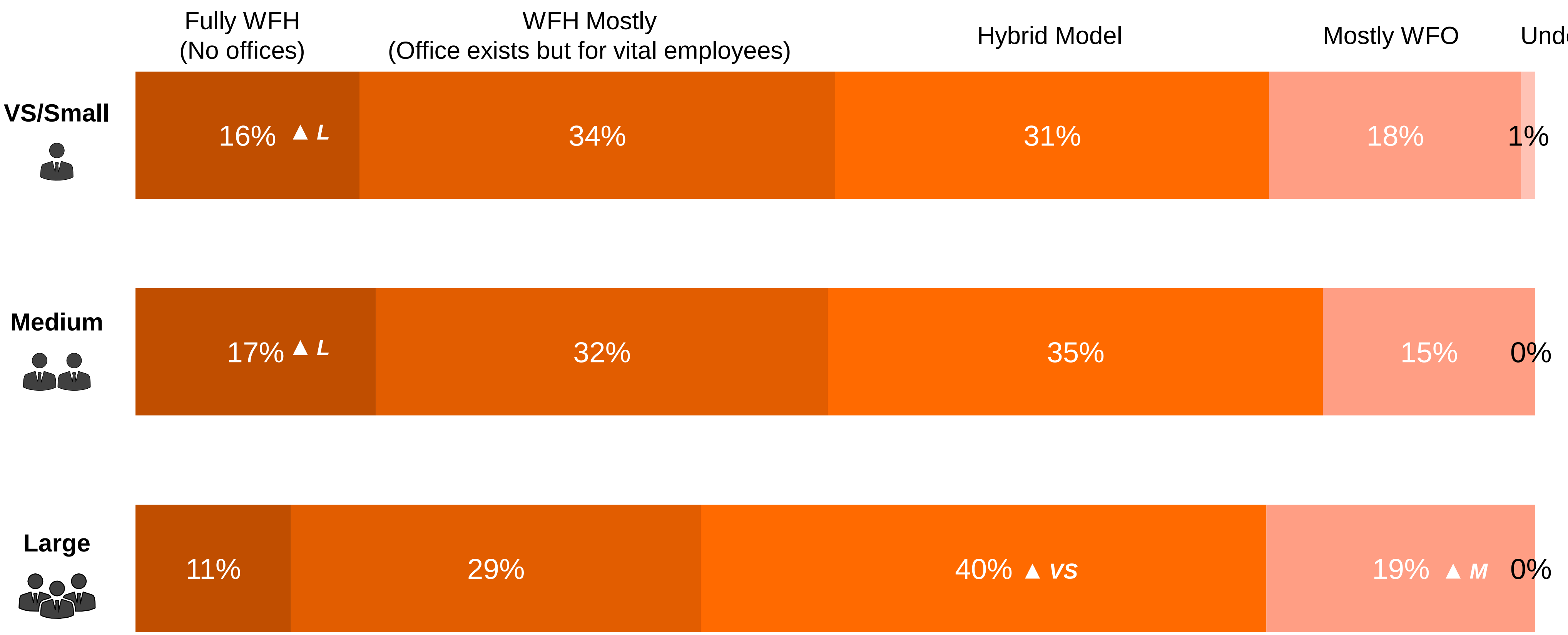
ITDMs



Most businesses anticipate employing some form of a hybrid work model, with employees working both at-home and in the office once Covid is no longer a concern

ITDM

Most Likely Work Location Scenarios without Covid-19 Issue



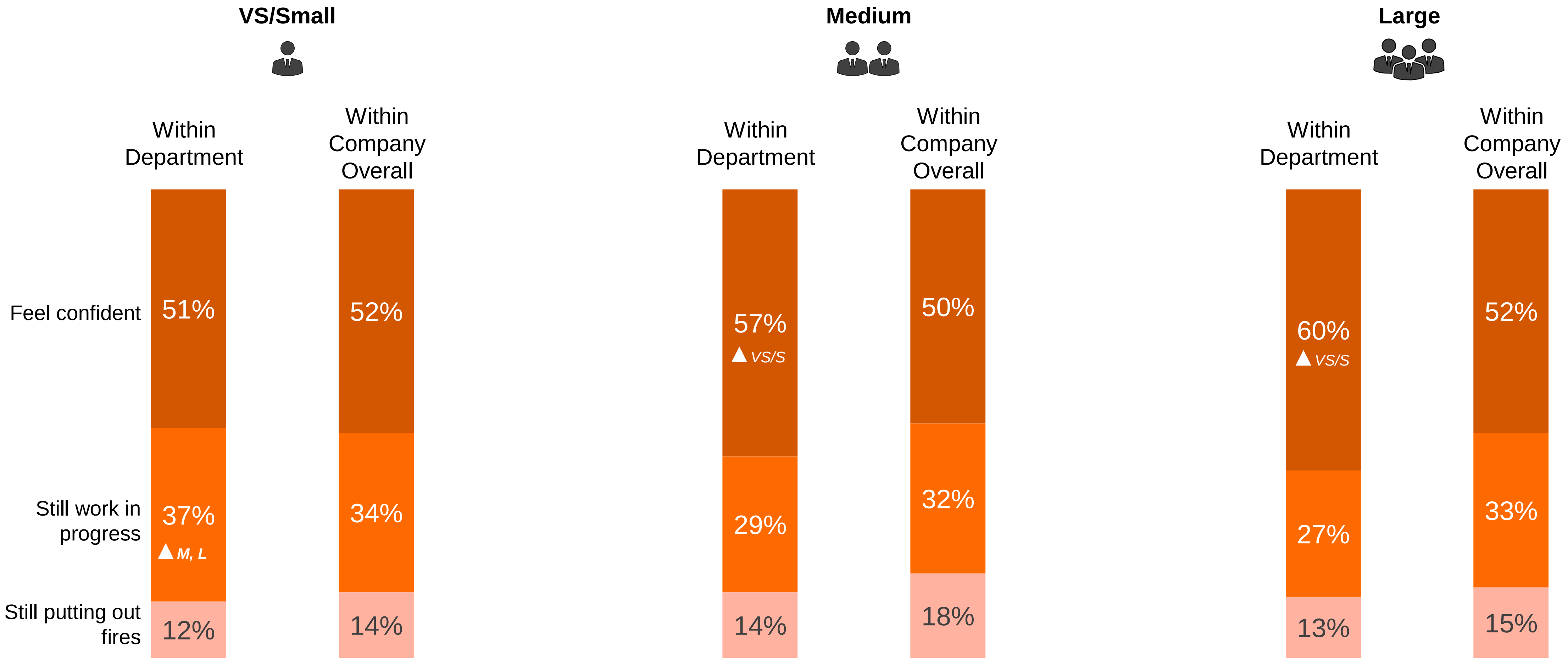
Market differences: Indonesia significantly likely to go mostly WFO across all business sizes

Base: ITDM VS/Small (n=1,471), Medium (n=1,474), Large (n=1,462)

The larger the company, the more confident ITDMs are in their own department, though confidence in the overall company stays flat regardless of size

ITDM

Ability to Keep Company Operations Running as Normal

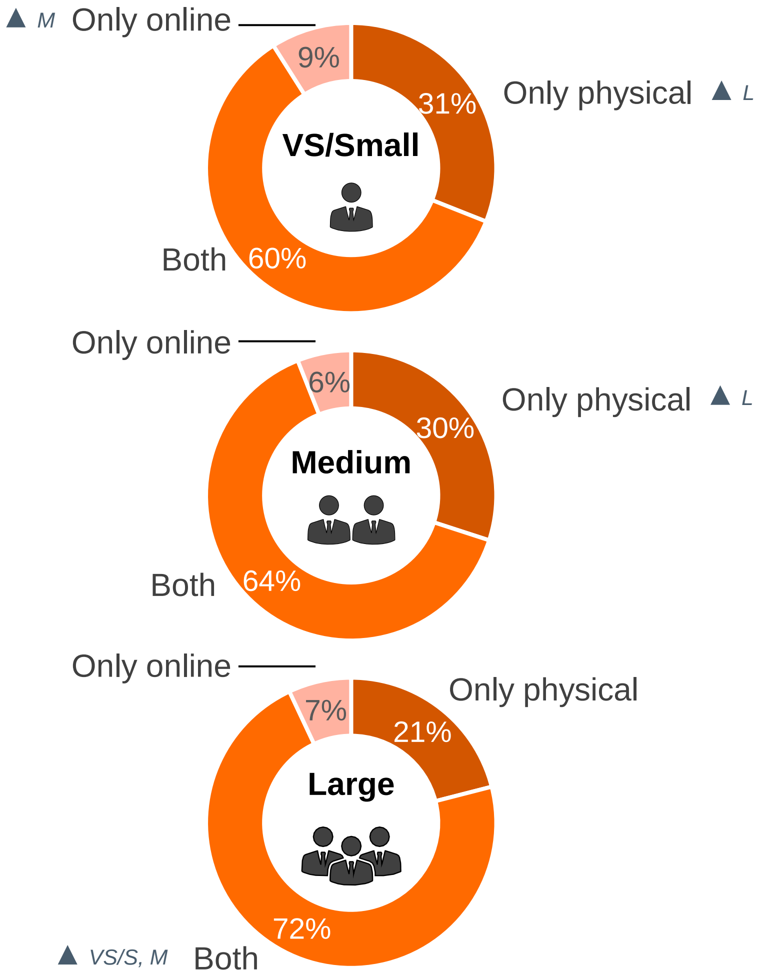


Base: ITDM VS/Small (n=1,471), Medium (n=1,474), Large (n=1,462)

A majority of businesses have both an online and physical presence pre-Covid. Those without an online component have since added one

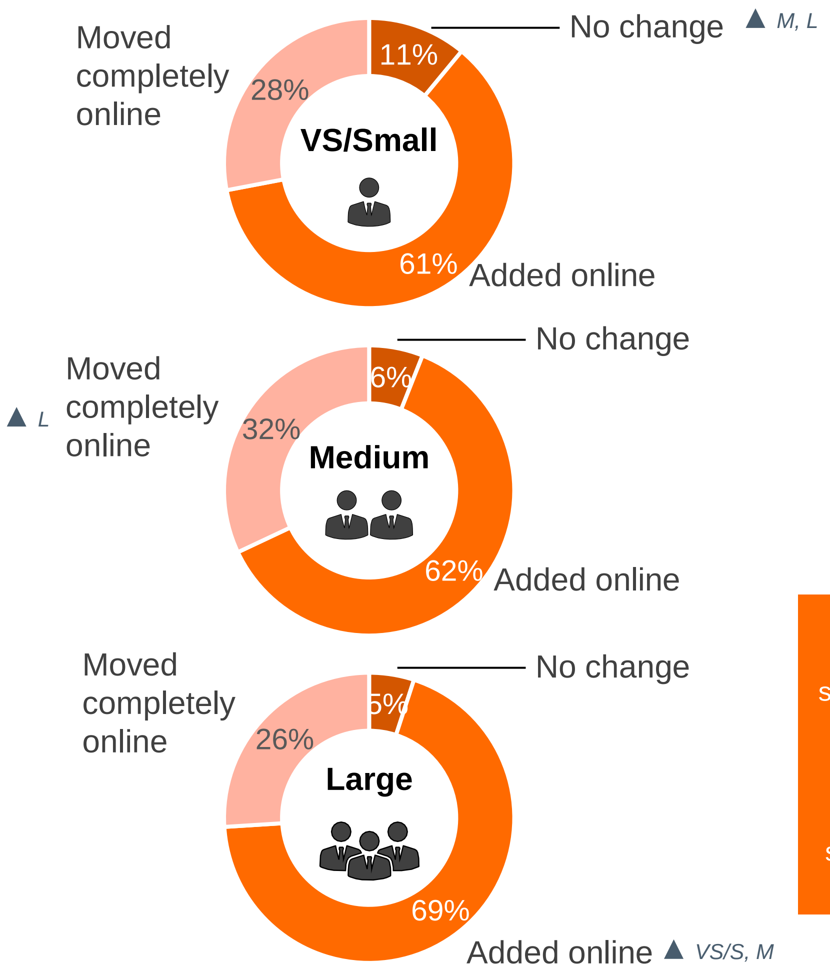
ITDM

Business Model Prior to Covid-19



How Covid-19 Changed Business

Among those who had physical locations



Market differences: Across all business sizes, USA more likely to only have physical stores; also across all business sizes, USA more likely to have switched to a completely online format

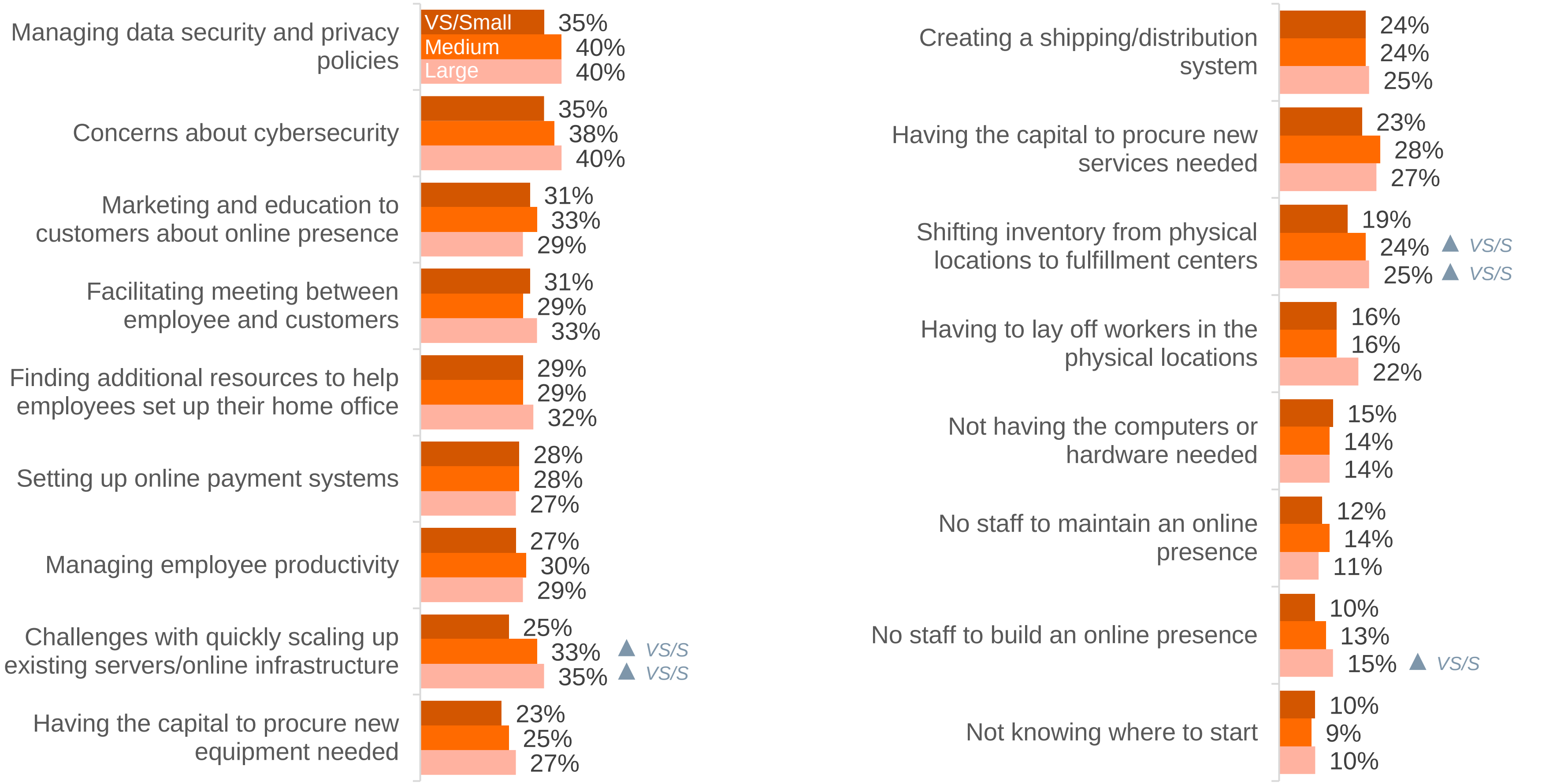
Base: ITDM VS/Small (n=1,471), Medium (n=1,474), Large (n=1,462)
Base: ITDM with physical locations VS/Small (n=1,313), Medium (n=1,363), Large (n=1,355)

There's no single challenge with pivoting to online that stands out as a massive issue, with all providing some challenge across business sizes

ITDM

Challenges with Pivoting to Online Business Model

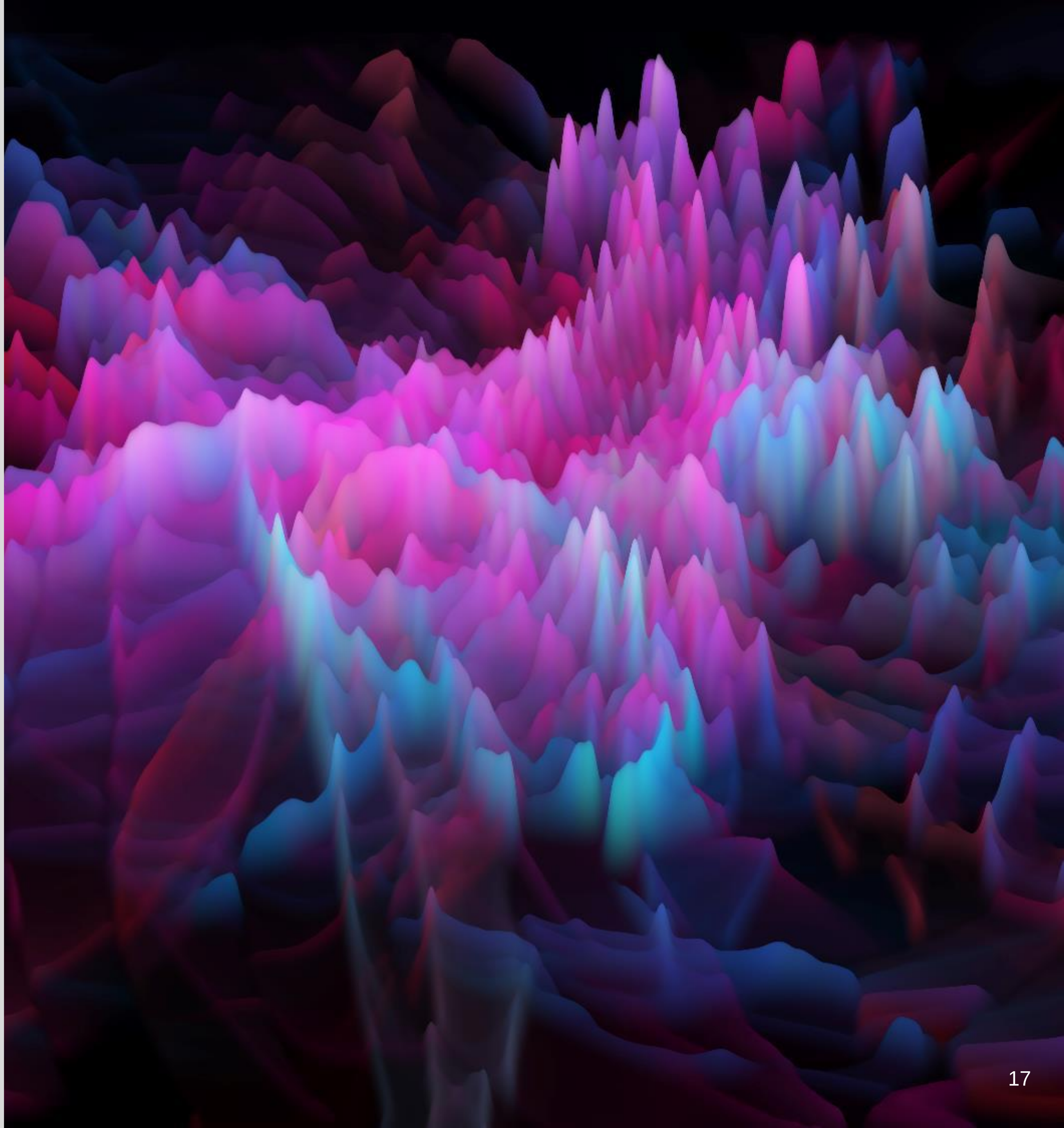
Among those who pivoted to online model



Base: ITDM with physical locations that pivoted online VS/Small (n=1,159), Medium (n=1,274), Large (n=1,274)

WFH wardrobe /collaboration tools

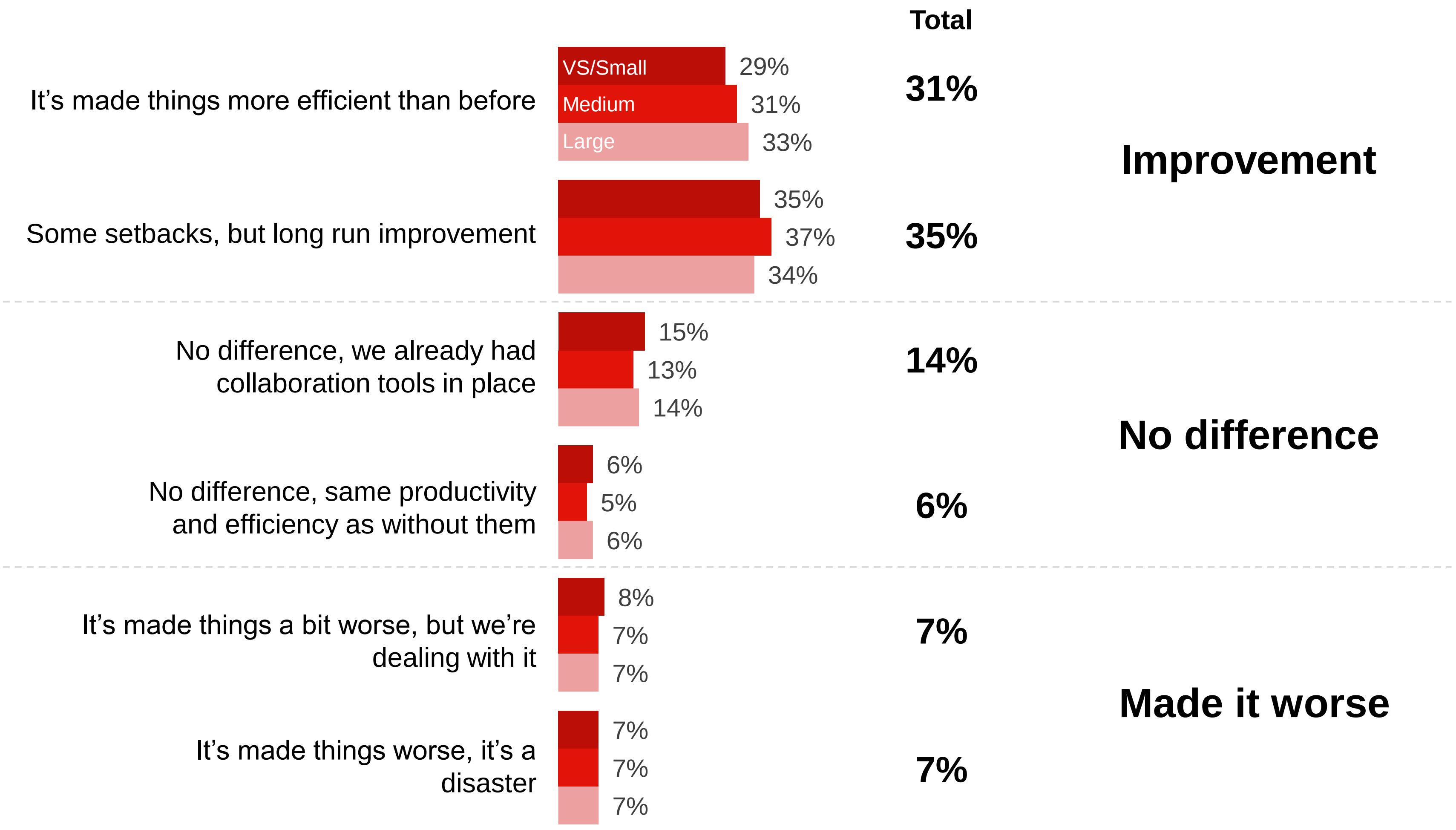
Employees + ITDMs



A majority believe that collaboration tools have improved their company's productivity and efficiency, even with some initial setbacks

Total

Collaboration Tools' Impact On Productivity & Efficiency



Base: Total using at least one collaboration tool (n=8,288), VS/Small (n=2,560), Medium (n=2,869), Large (n=2,859)

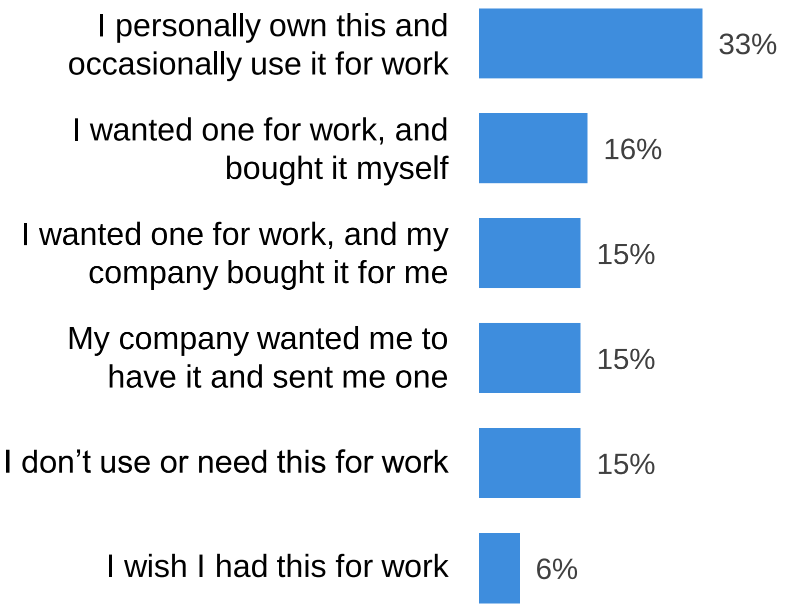
Work smartphones are more likely to be BYOD. Communication on a smartphone has become part of workflow post-Covid

BEU

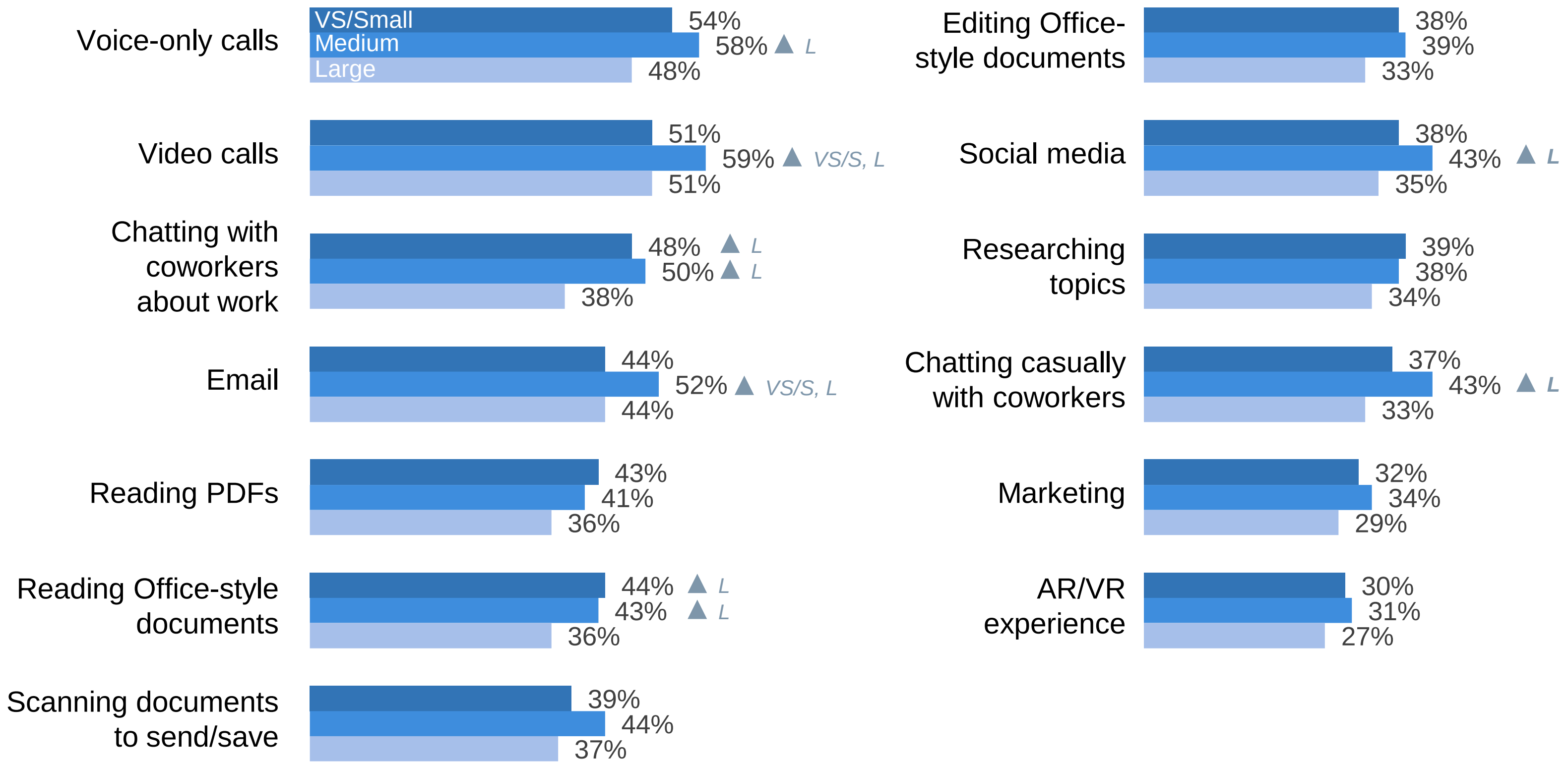
Smartphone Use in Work Capacity

How BEU Acquired the Smartphone

NET: Uses phone for some work	NET: Self provided	NET: Work provided
79%	49%	30%



Work Activities Done on BEU Smartphone More Often than Before Covid-19



Base: Total BEUs (n=4,126)

Base: BEUs using smartphone for work VS/Small (n=1,028), Medium (n=1,191), Large (n=1,143)

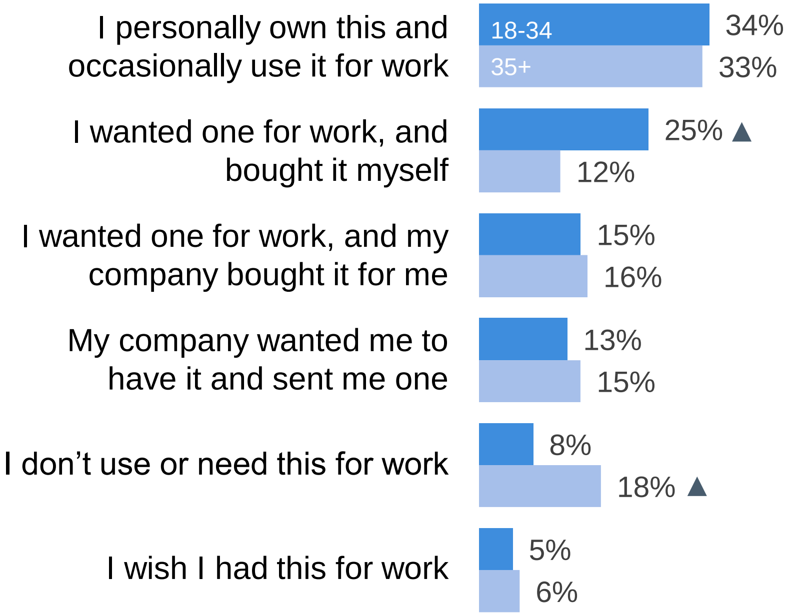
Younger BEUs are more likely to use smartphones for work, bring their own, and use them for a variety of work tasks

BEU

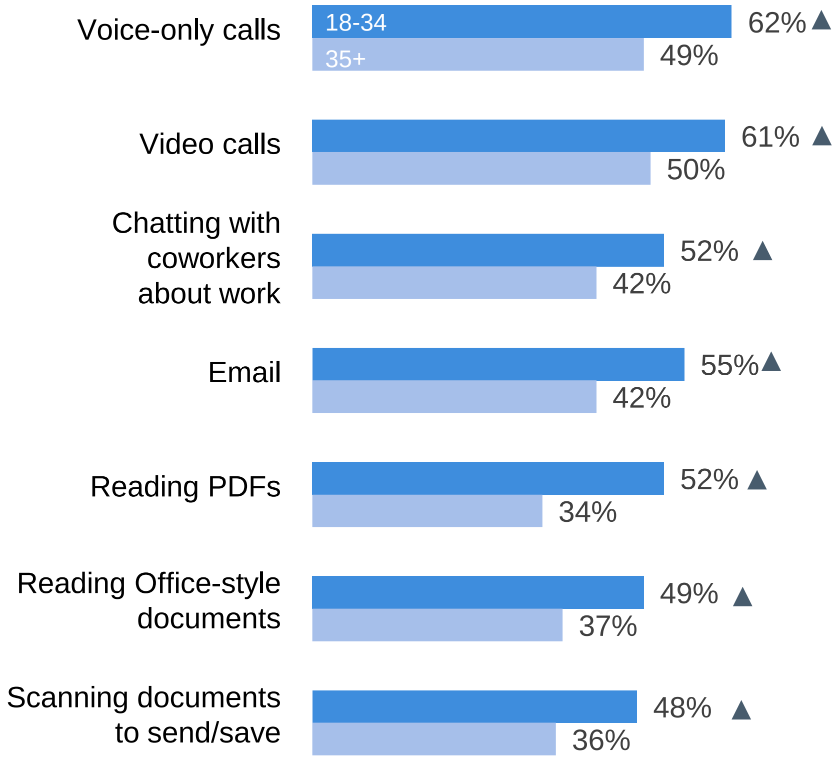
Smartphone Use in Work Capacity

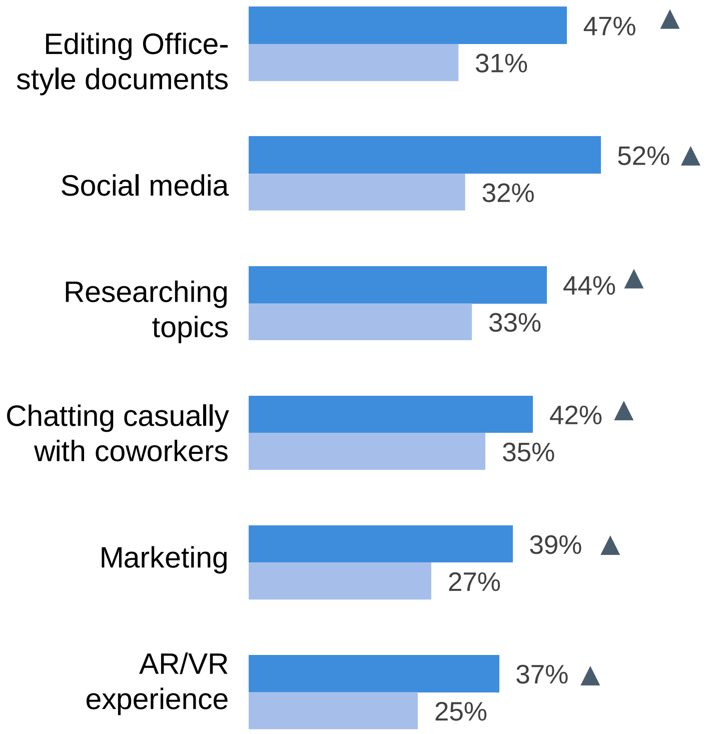
How BEU Acquired the Smartphone

	NET: Uses phone for some work	NET: Self provided	NET: Work provided
18-34	87% ▲	59% ▲	28%
35+	76%	45%	31%



Work Activities Done on BEU Smartphone More Often than Before Covid-19



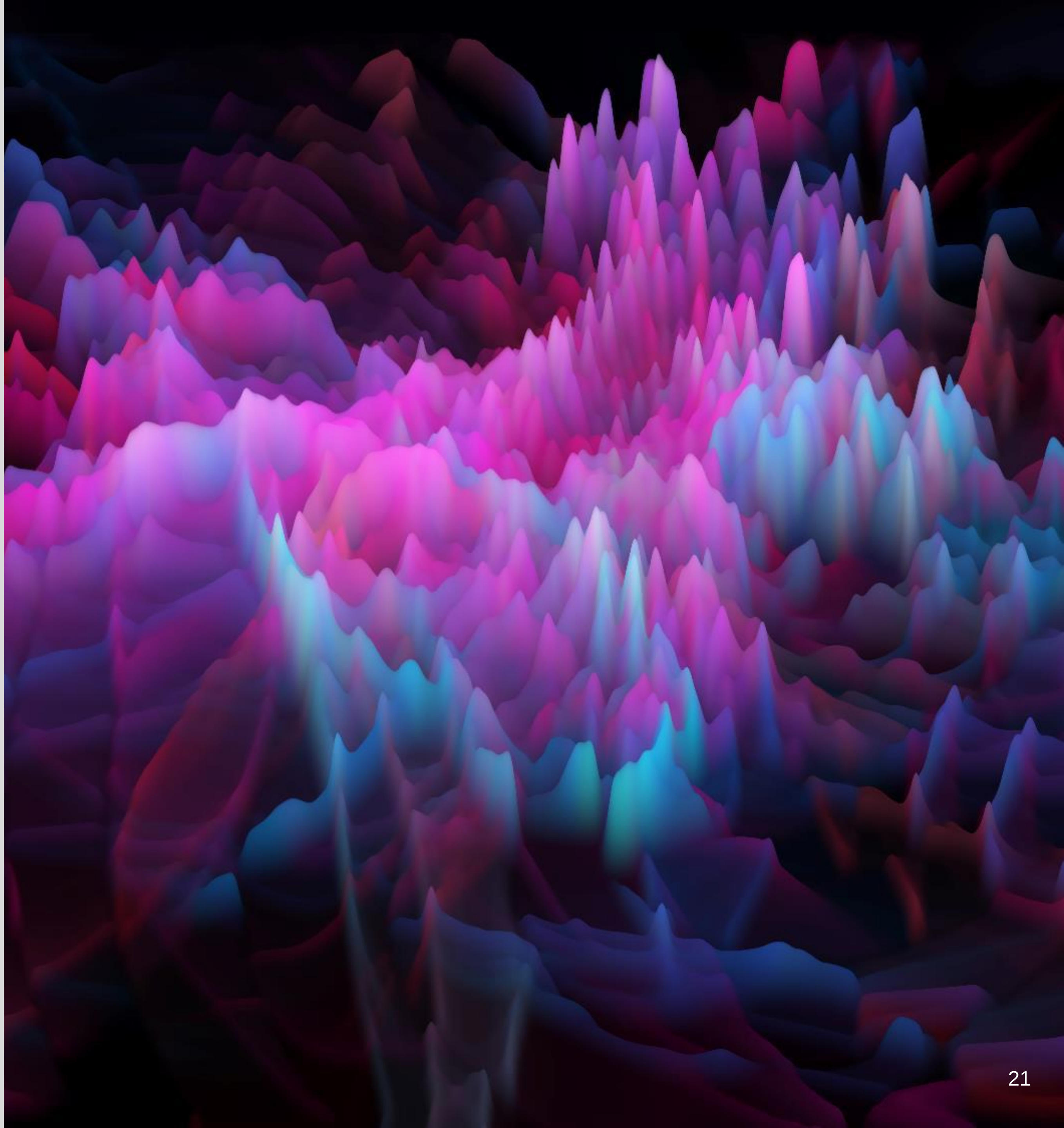


Base: Total BEUs Age 18-34 (n=1,452), Age 35+ (n=2,638)

Base: BEUs using smartphone for work Age 18-34 (n=1,119), Age 35+ (n=2,152)

Digital Transformation

ITDMs

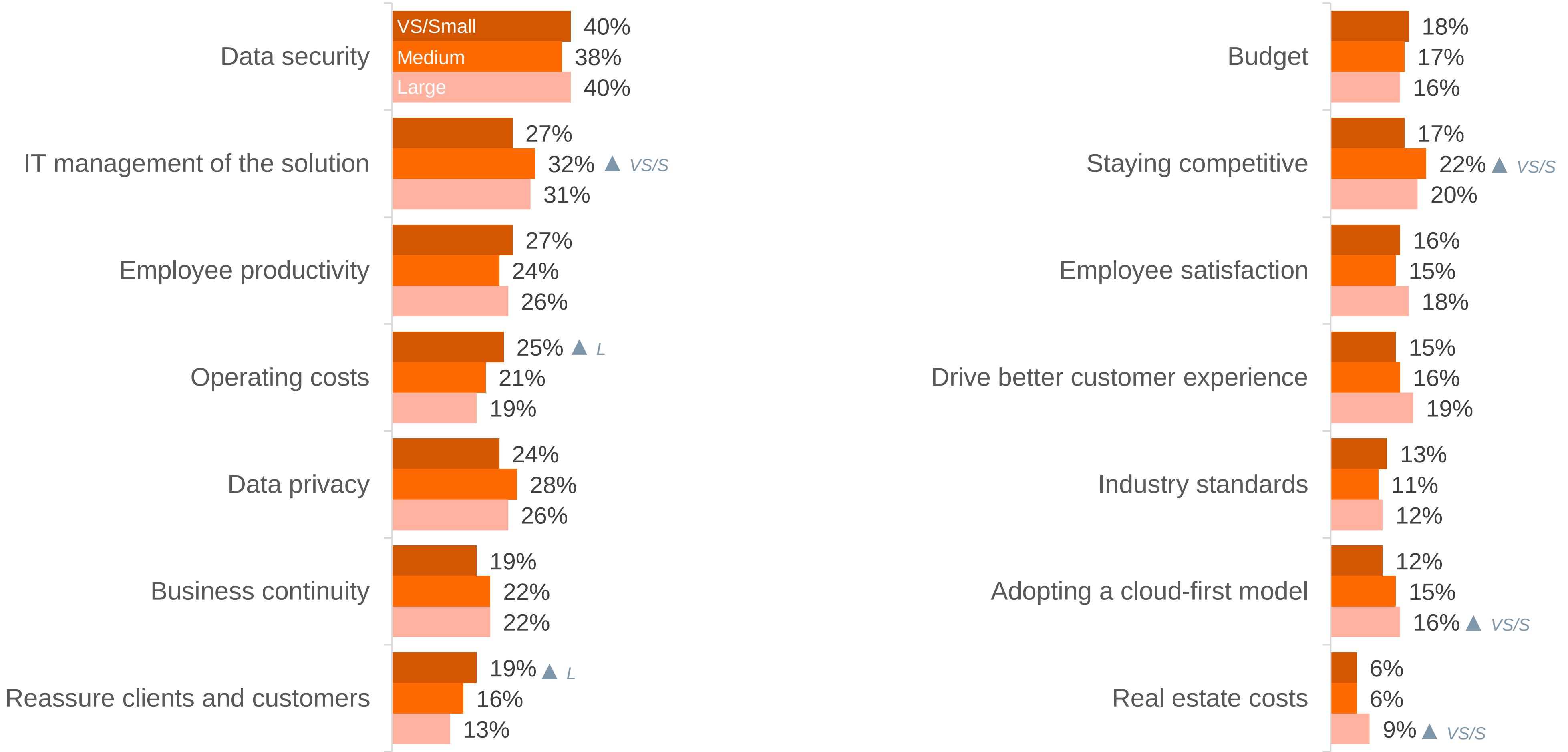


Data security and being able to feel like they still have control are top of mind for ITDMs when considering digital transformation solutions

ITDM

Top Digital Transformation Considerations

Max of 3 selected



Base: ITDM VS/Small (n=1,471), Medium (n=1,474), Large (n=1,462)

All-in-one hardware/software bundles, training sessions, and ROI reports are among the most useful strategy solutions, especially among ITDMs at large businesses

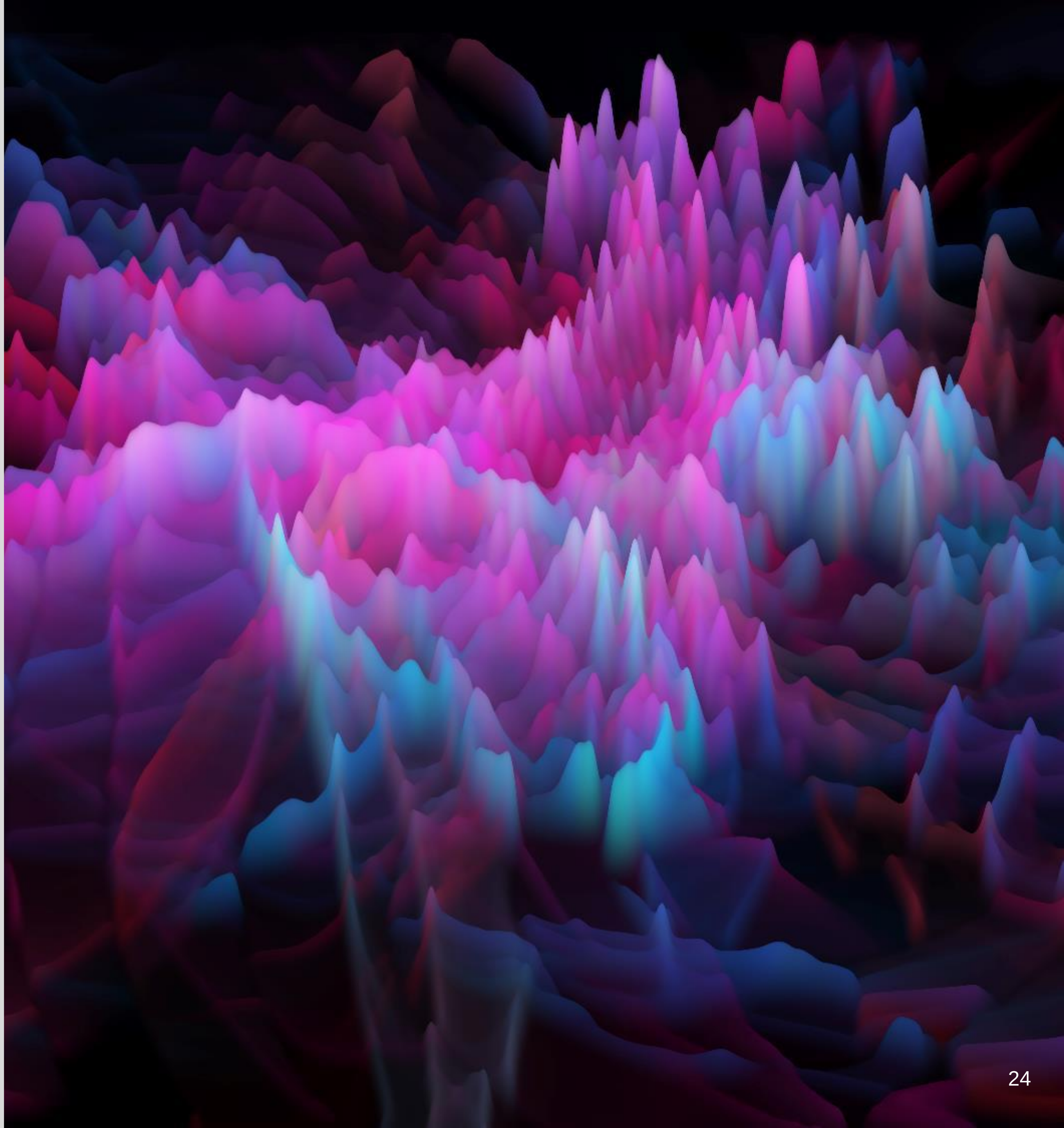
ITDM

Useful Remote Work From Home Strategy Solutions

Base: ITDM VS/Small (n=1,471), Medium (n=1,474), Large (n=1,462)

Device As A Service (DaaS)

ITDMs



A majority of ITDMs are interested in DaaS, more so in larger companies, citing tangible benefits for IT, scalable and up-to-date hardware.

ITDM

DaaS Interest

Extremely/Very interested

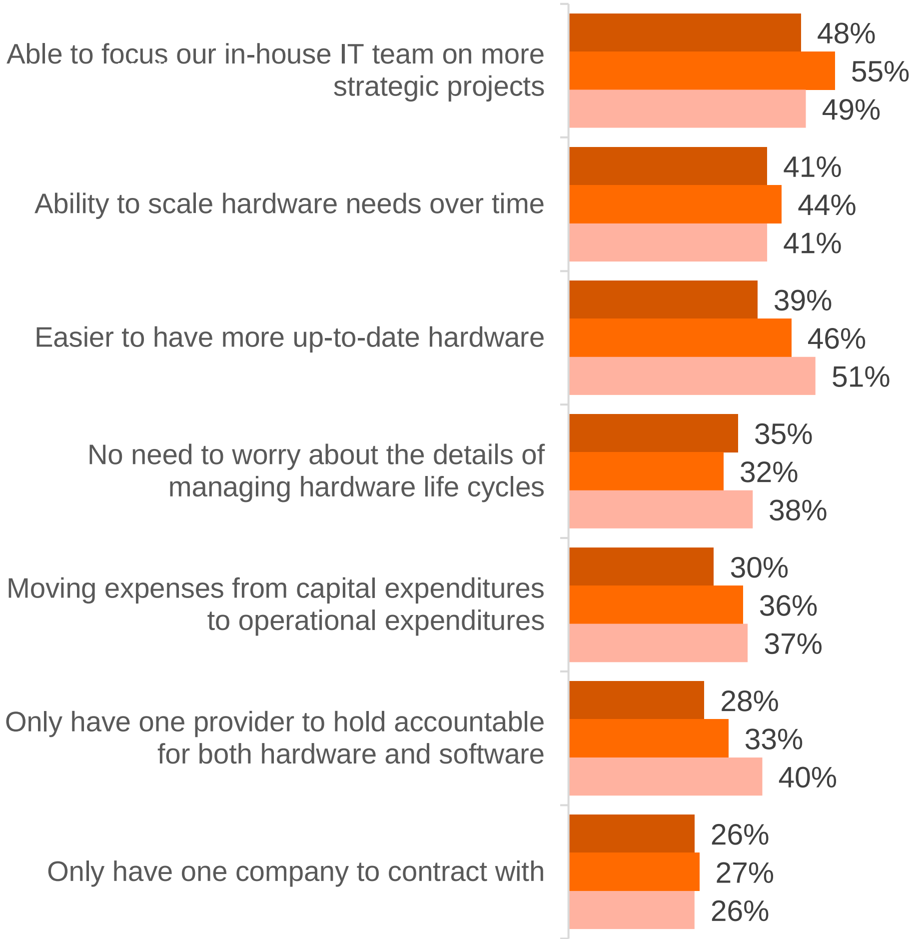
53%
VS/Small
8% already use DaaS-like service

68% ▲ VS/S
Medium
12% already use DaaS-like service

67% ▲ VS/S
Large
11% already use DaaS-like service

Benefits of DaaS

Among those at least somewhat interested



Base: ITDM VS/Small (n=1.471), Medium (n=1,474), Large (n=1,462)
Base: ITDM at least somewhat interested in DaaS VS/Small (n=1,252), Medium (n=1,396), Large (n=1,343)

thanks.

Smarter
technology
for all