



thingsat Market Scan Survey 2023

In late 2023, ThingsAt set out to better understand Australian worker's IT device usage, needs and preferences.

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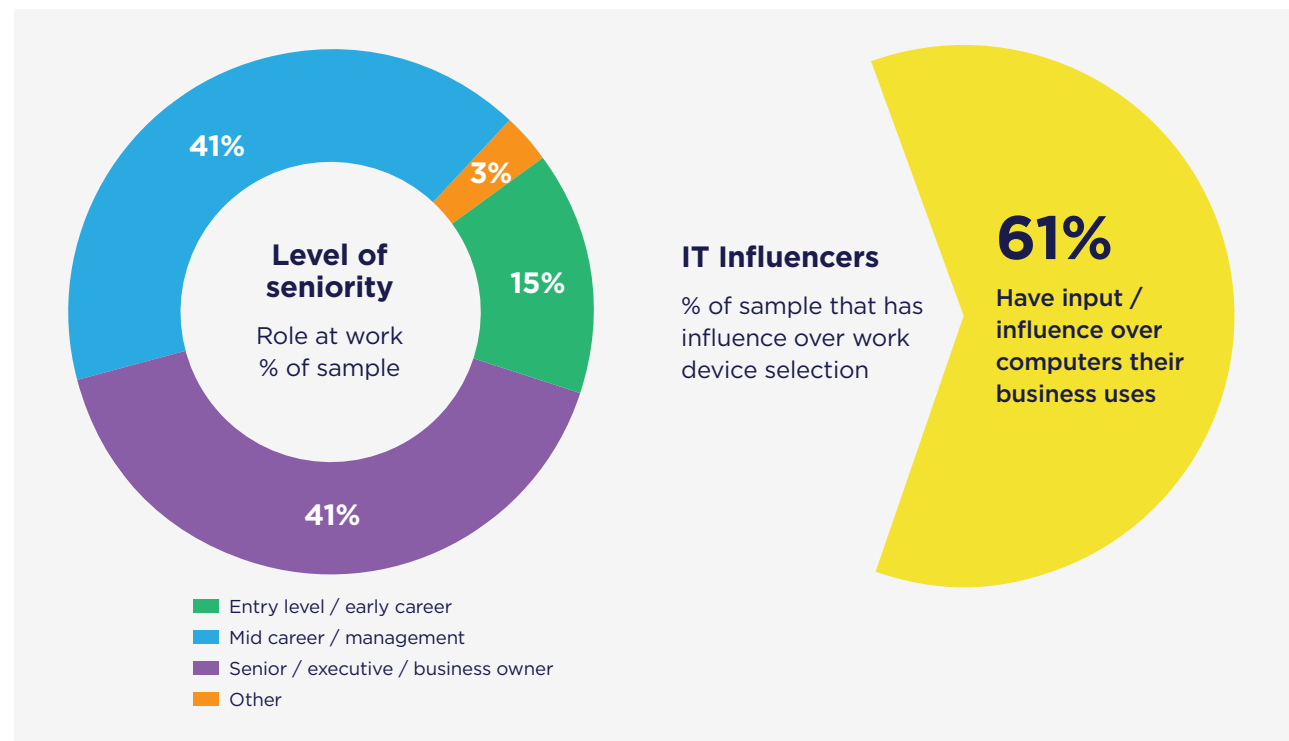
We engaged 3arc to undertake an online survey of n=1,000 with workers based in VIC, NSW and QLD, aged over 25 years and employed/self-employed in the private sector across a mix of business sizes and industries.

We found that Australian workers want to have some sense of control of where and how they work. Choice and input into their primary work tools is part of this, but only 14% of laptop users actually have a say in what work-supplied laptop they receive and yet two in three respondents (64%) would prefer choice in some format i.e. either bring your own device (BYOD) or selection from a list of device options supplied by their employer.

A lot more people want choice than are getting it.

We know that employees also want flexibility in terms of how and where they work. This research suggests that it is now extending to workplace tools. Many employees are hybrid working, this changes how devices fit into their life. Choice is important because we don't work in the same place anymore. We've got different backgrounds and different set ups, it's more about fitting with the employee.

This presents a remarkable opportunity for employers to stand out from the pack and attract quality staff. Putting the function of laptop choice into employee hands is a simple but powerful way to better attract and retain great people.

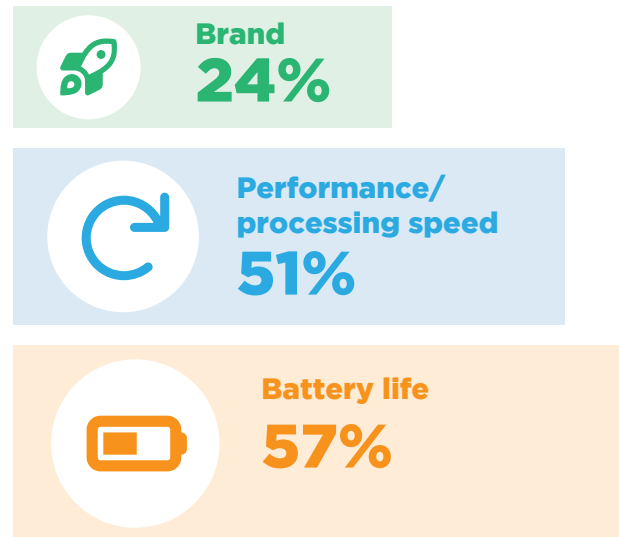


Key findings

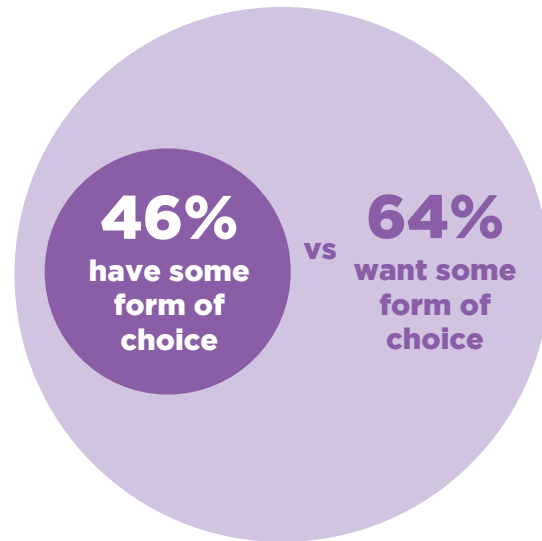
Businesses can save money by building a new IT strategy

Employers may be surprised to know that they could offer lower cost devices to employees as part of a choice/menu of options. Employees want a higher level of empowerment in terms of the way they work and the tools they use, they are looking for a machine that is right for their role. The brand and size of device is less likely to be important than its battery life and speed.

What's important in your laptop?



Preferred method of choice for laptop



Businesses can deliver an improved employee experience

50% of people are at best 'somewhat satisfied' with the device they are using. Their laptop does what it's supposed to do, but it could be better. Employers are getting the basics right- but they are missing an opportunity to provide a positive employee value proposition. Laptop/device choice is not about attraction of employees, but better retention - more employees want a choice than have a choice.

Future workforce and current workforce have different needs

Laptop usage is higher amongst younger people and those in the early stages of their career. Older workers are happier with desktops however laptops and desktops are not the only solutions. There is an interesting dynamic for the next generation coming through, those under 35 are tech savvy and have been using computers since kindergarten. More are likely to want tablets than the older generation.

Most needed work device



Findings from the research

Laptops and smartphones are the most used devices

Laptops and smartphones are the most used, with around nine in ten respondents indicating that they use them regularly.

Seven in ten are regularly using desktops, with industries such as healthcare, hospitality, tourism, and retail over-represented.

Most used work devices

90% people use a laptop and smartphone for work”



Time spent on laptop per day



Predictably, most time spent on desktops and laptops

Most people are on their device less than half the day, even the most used devices (desktops / laptops / monitors) are generally used for less than four hours a day.

Industry is not a major driver of device use; even in the most white-collar industries such as finance, consulting, and law, the hours per day spent using devices is similar to more blue-collar industries (construction, manufacturing, etc).

Less senior workers spend more time on devices. Those at early or mid-stages of their career are spending significantly more time on desktops and laptops. As leadership tasks increase, senior workers spend less time on devices.

Desktops and laptops more commonly supplied by employer without choice to employee

Regarding laptops, more people have no choice than have choice. 46% have some form of choice (BYOD or choose from a list) compared to 53% who have no choice of device selection (no choice or legacy device).

BYOD is most common for tablets and smartphones. Desktops, laptops, and additional monitors were all much more likely to be provided by employers than being self-selected.

Seniority has an impact. A higher proportion of respondents at a senior / executive level were able to select their own desktop, laptop and monitors compared to junior and mid-level workers.



Findings from the research

Being offered choice is the most preferred approach

Tailoring the workplace experience is something people want, but they aren't getting it. Companies are not aligning with people's desires.

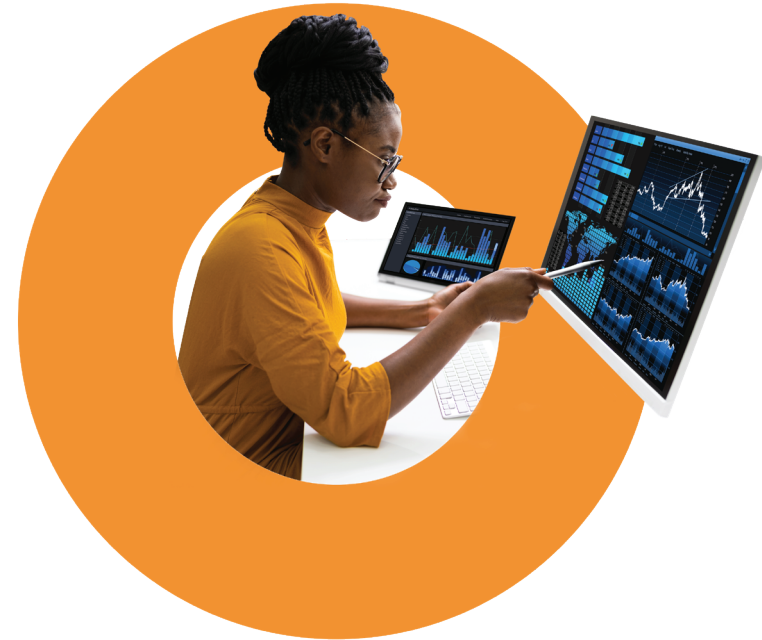
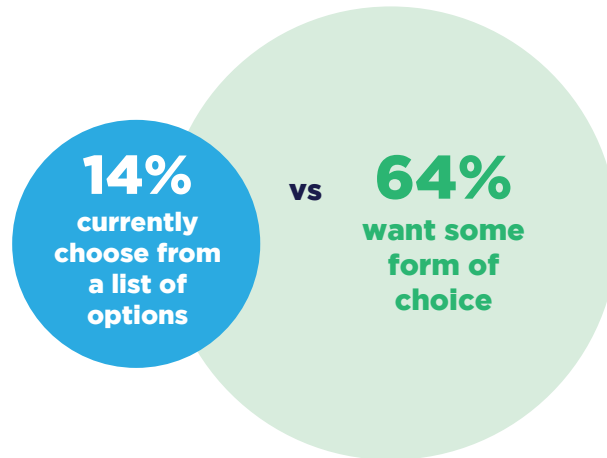
Two in three respondents would prefer 'choice'. Across all device types, a higher proportion of respondents indicated they would prefer to choose their device in some format (i.e., BYOD with reimbursement or from a list) than have no choice.

Whilst 14% were able to choose their laptop from a list supplied by their employer, 34% would like to access their device through this 'menu' style approach – a significant change.

Very few have no preference. At most, only one in ten have no preference at all about how their device is selected.

White collar workers (37%) are more likely to prefer to choose from an employer approved list for their laptops.

Employees want some form of choice



Majority using external monitors with laptop

Multiple monitors are the norm. Three in four respondents stated that they were using additional monitors regularly. Those aged 25 to 39 years were most likely to be using monitors.

A high proportion prefer two or more screens. Of those who do use additional monitors, more than half stated they prefer using at least two monitors per day.

People want to use external monitors with their laptop, employers need to consider the office environment to ensure it's easy to plug in and get started. This extends to the home office environment where workers should be able to replicate what happens in the office with ease.

There is no difference in preference when looking at type of work tasks. The type of work tasks (i.e., creative versus non-creative tasks) did not appear to have an impact on preference for additional monitors.



Findings from the research

Most agree that a laptop is needed for their role

Overall, a laptop is most likely to be viewed as needed for their current role. Four in five agree that a laptop is needed for their current role, and less than half say they need a desktop.

Younger respondents more likely to feel they need tablets than their older peers. Respondents aged under 35 years were more likely to state they believe they need a tablet for work compared to those above 35 years old.

Seniority in role affects needs. Senior leadership / executives were more likely to say they need a desktop, tablet, and smartphone than those earlier in their career. Those earlier in their career more likely to select laptops as their most needed device.

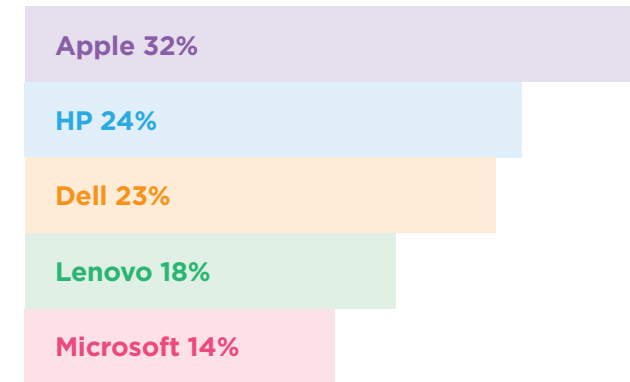
Hygiene factors float to top for laptops

Battery life and performance / processing speed were most frequently rated 'important'. Overall, battery and processing speed were viewed as important to respondents for those who use laptops, with one in three citing these factors as most important to them.

Price is significant for small organisations and self-employed. For organisations with ten or fewer employees or those who were self-employed, price was more likely to be seen as important.

Features are much more likely to be seen as important than brand.

Preferred laptop brand



Apple is the strongest single brand

Besides Apple, no brands hold clear leadership positions. From a laptop and PC perspective, amongst those who are not Apple / Mac preferers there are no stand-out brands with Dell, HP and Lenovo all appreciated.



Conclusion



More people want choice than have choice and the brand and size of the device is less likely to be important than its battery life and speed.

80% people need laptops for work and yet 49% are at best somewhat satisfied with their current laptop. Regardless of work task, the same things are important – battery and speed/performance. Nothing else matters really, get the fundamentals right, let employees choose from a short list and your people will be happy.

Research approach

- Online survey
- 10-minute online survey with n = 1,000 workers

September/October 2023
Undertaken by 3arc

Targeted approach

All respondents were:

- VIC, NSW and QLD
- Employed / self-employed in the private sector (non-Gov't)
- Using their own (non-shared) designated device for work (laptop / tablet / desktop computer)
- Aged 25+
- Mix of business sizes and industries, gender, income levels, work function / role

About 3arc

3arc is an insights and strategy consulting agency, formed in 2021, with offices in Sydney and Melbourne.

3arc covers commercial and social research across Asia Pacific and specialises in strategic intelligence on customer and citizen needs and experiences, through evidence-based strategy, evaluation, performance measurement and innovation. <https://www.3arc.co>

About thingsat

Established in 2017, ThingsAt is an end user compute and collaboration provider specialising in Device Management and Device as a Service (DaaS).

The company takes a vendor agnostic approach to securing the best cost and productivity outcomes for clients, combining hardware, software and services into a monthly fee which provides the flexibility to meet customers' evolving needs.

For more information visit thingsat.com or follow the company on LinkedIn @ThingsAt



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