



REGION FOCUS: WORLDWIDE

# Inspire Your Modern Workforce with Next-Gen PCs



**Tom Mainelli**  
Group Vice President,  
Device and Consumer Research, IDC

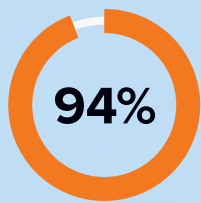
# Table of Contents



CLICK BELOW TO NAVIGATE TO EACH SECTION IN THIS DOCUMENT.

<b>IDC Opinion</b> .....	<b>3</b>
<b>Methodology</b> .....	<b>5</b>
<b>Situation Overview</b> .....	<b>6</b>
<b>Key Use Cases, Technologies, and Tools</b> .....	<b>7</b>
<b>Considering Intel</b> .....	<b>12</b>
<b>Challenges/Opportunities</b> .....	<b>13</b>
<b>Conclusion</b> .....	<b>14</b>
<b>About the IDC Analyst</b> .....	<b>15</b>
<b>Message from the Sponsor</b> .....	<b>16</b>

# IDC Opinion



**of ITDMs and LOB respondents said the quality of the PC they deploy was either somewhat or very important when it came to recruiting new employees or retaining existing ones.**

Companies continue to navigate a world where many employees have transitioned fully to working in remote or hybrid modes, talent acquisition remains challenging, and employee satisfaction and retention have become key performance metrics. As a result, the role of the PC as it relates to the workforce has only become more critical. As companies contemplate their next PC refresh, more IT decision makers (ITDMs), line-of-business (LOB) managers, and HR professionals have come to recognize the importance of outfitting employees with the right PCs to help them work smart, collaborate better, and protect the company's assets and data.

A recent multinational IDC survey shows just how important providing next-gen PCs to new employees can be. Among ITDMs and LOB respondents, 94% said the quality of the PC they deploy was either somewhat or very important when it came to recruiting new employees or retaining existing ones. Moreover, a majority (71%) of those respondents either agreed or strongly agreed with the statement that younger millennials and Gen Z prospects are more likely to take a job if offered a modern, well-equipped PC as a new employee.

Equipping your workforce with new PCs isn't just important when it comes to recruitment and retention, either. Our research regularly shows that employees receiving modern PCs get more done and are consistently happier. When we asked respondents about the importance of a high-quality PC when it comes to employee productivity and job satisfaction, 96% said it was either somewhat or very important. Fewer than 4% said it was not important at all. An even higher percentage of respondents (98%) noted that PC-based tools have become somewhat or very important in driving better collaboration inside the company.

A happy, highly collaborative workforce is a critical element of a successful company, but there are other important considerations when it comes to the devices an organization deploys. New PCs' other benefits include enhanced endpoint security, upgraded data protection capabilities, and improved manageability features. Each of these is designed to help limit employee downtime, enhance their productivity, and streamline the job of IT.

This white paper examines some of the key benefits of deploying next-generation PCs as viewed through the eyes of ITDMs and LOB managers; it outlines some of the new features and capabilities of business PCs shipping into the market today and looks to articulate the benefits they can drive for your business.

# Methodology

IDC surveyed respondents at midsize businesses (500–1,000 employees) and enterprise companies (1,000+) in the United States, the United Kingdom, France, China, Japan, and India. The survey was conducted online in January and February 2023. Respondents included ITDMs (75%) and LOB managers (25%) from various industries. To qualify, respondents needed to have an influence on their companies' device purchases.

# Situation Overview

The PC has never been more mission critical, as evidenced by the record number of commercial PCs that shipped into the market in recent years. In 2020, commercial PC volumes surged to 165 million units worldwide, the second-highest total on record. And in 2021, the market grew again by 15% to break all records at 190 million units. The message was clear: As the world shifted toward remote and hybrid work, acquiring new PCs to outfit that transforming workforce became critical.

Since those two banner years, the role of the PC in business has become even more critical as use cases expanded and evolved and new technologies and features came to the forefront. As companies begin to do more long-term strategic planning around their evolved workforces and workflows, understanding the wants and needs of employees and IT in terms of the PCs they use and manage has become critically important.

This document illuminates critical technologies, use cases, and employee benefits of refreshing your device fleet with modern PCs; explores some of the challenges IT faces, including keeping those PCs and the data it contains secure; and finally, looks at the evolving impact of employee recruitment, retention, and satisfaction as it relates to the PCs companies deploy.

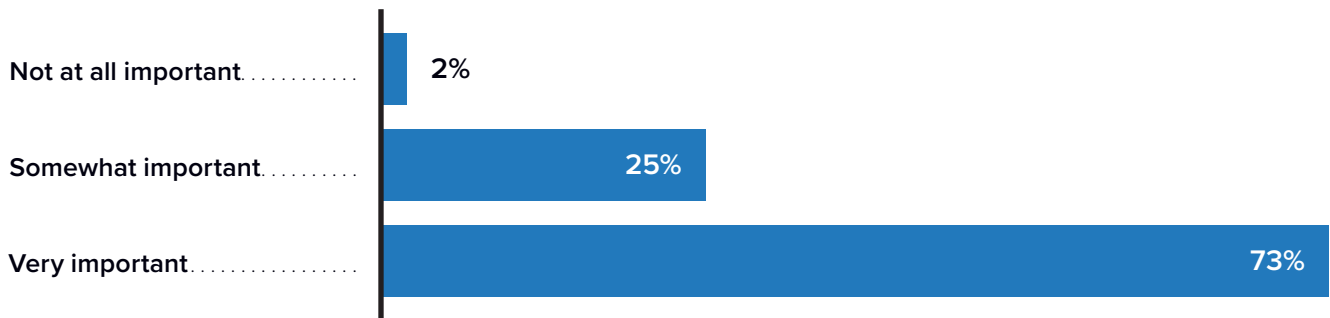
# Key Use Cases, Technologies, and Tools

As employees juggle in-person and remote collaboration requirements, integrated next-gen cameras, mics, and speakers on their notebooks that drive high-quality video calls and meetings have become mission critical. These technologies become no less important as companies ask more employees to come back to the office, as often today, even those employees in the room need to turn on their notebook video to even the playing field for remote workers. When we asked respondents about the importance of good collaboration tools, the response was overwhelming: They are critical (see **Figure 1**).

**FIGURE 1**

## Importance of PC Collaboration Tools

How important is it to have PCs that provide good collaboration tools for your employees, including quality cameras, microphones, and speakers?  
(% of respondents)

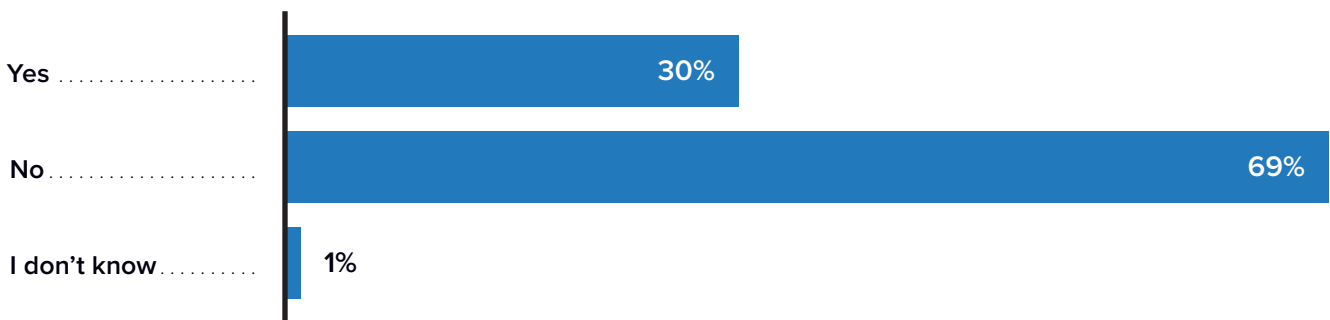


n = 785; Source: IDC's *Intel Modern PC Survey*, 2023

One of the key improvements that have come to the commercial PC in recent years is the touchscreen. While longtime PC users may not instinctually reach to touch their notebook screen, younger employees raised on touch-based phones and tablets expect to be able to interact with their PC this way. In addition, touch-enabled PCs help employees shift between work modes and represent a notable upgrade over older nontouch PCs and competing platforms without touch.

However, many companies have yet to deploy touch PCs (see **Figure 2**). The cost of including touch has come down dramatically, and any company looking to drive employee satisfaction should seriously consider the feature when making PC buying decisions.

**FIGURE 2**  
**Touch-Enabled Notebooks Deployed**  
 Do you deploy any touch-enabled notebooks to your workforce?  
 (% of respondents)



n = 785; Source: IDC's *Intel Modern PC Survey*, 2023

Touch isn't the only critical upgrade to arrive on commercial PCs in recent times. As always, networking standards continue to march forward, too, and when considering your next fleet upgrade, it is critical to ensure your selection includes the latest Wi-Fi standards. Wi-Fi 6E capabilities and next-generation network optimization technologies help drive enhanced productivity and improved employee collaboration. When we asked respondents about the importance of acquiring PCs with the latest version of Wi-Fi, an overwhelming majority categorized this as either somewhat or very important (see **Figure 3**, next page).

If your company has a largely remote/hybrid workforce or if segments of your team travel extensively on the job, it's also worth considering deploying cellular-enabled PCs. Today's latest products, featuring LTE or 5G connections, ensure an always-connected PC that doesn't require the user to connect to dodgy public or hotel Wi-Fi hotspots or overburdened home connections. A cellular-connected notebook's additional benefits are higher-quality service, improved collaboration, and always up-to-date security patches. Despite these clear benefits, only 27% of respondents said they'd deployed cellular-enabled notebooks, with another 24% saying they will probably or certainly will deploy in the next 12 months (see **Figure 4**, next page).



FIGURE 3

### Importance of Having the Latest Version of Wi-Fi

How important is to have the latest Wi-Fi technology integrated into a PC when it comes to enhanced connectivity, productivity, and collaboration?

(% of respondents)



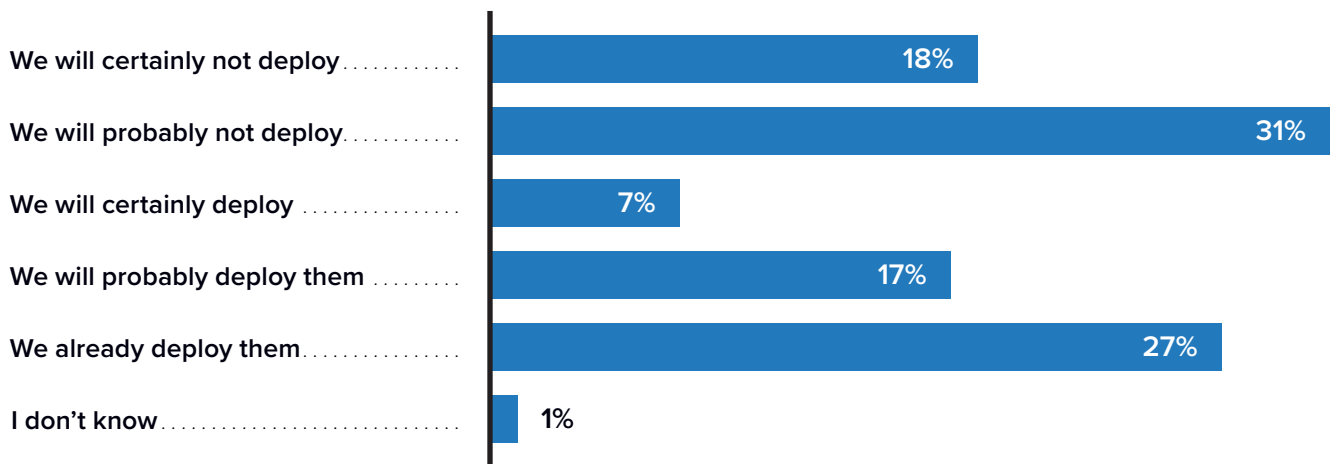
Note: % corresponds to number of respondents: totals may not sum to 100% due to rounding. n = 785; Source: IDC's *Intel Modern PC Survey*, 2023

FIGURE 4

### Deployment of Cellular-Enabled Notebooks

How likely is it for your company to deploy cellular-enabled notebooks (LTE or 5G) to its end users in the next 12 months?

(% of respondents)



Note: % corresponds to number of respondents: totals may not sum to 100% due to rounding. n = 785; Source: IDC's *Intel Modern PC Survey*, 2023

While the role of the PC has evolved dramatically in recent years, one thing hasn't changed: the need to keep those PCs safe from bad actors. Security remains a top challenge for ITDMs, and modern PCs offer next-generation technologies that make it easier to keep employees and their data safe. This is a topic about which respondents were very clear. When we asked them if they agreed with the statement "modern PCs are more secure than those deployed two to five years ago," well over half agreed with the statement (see **Figure 5**).

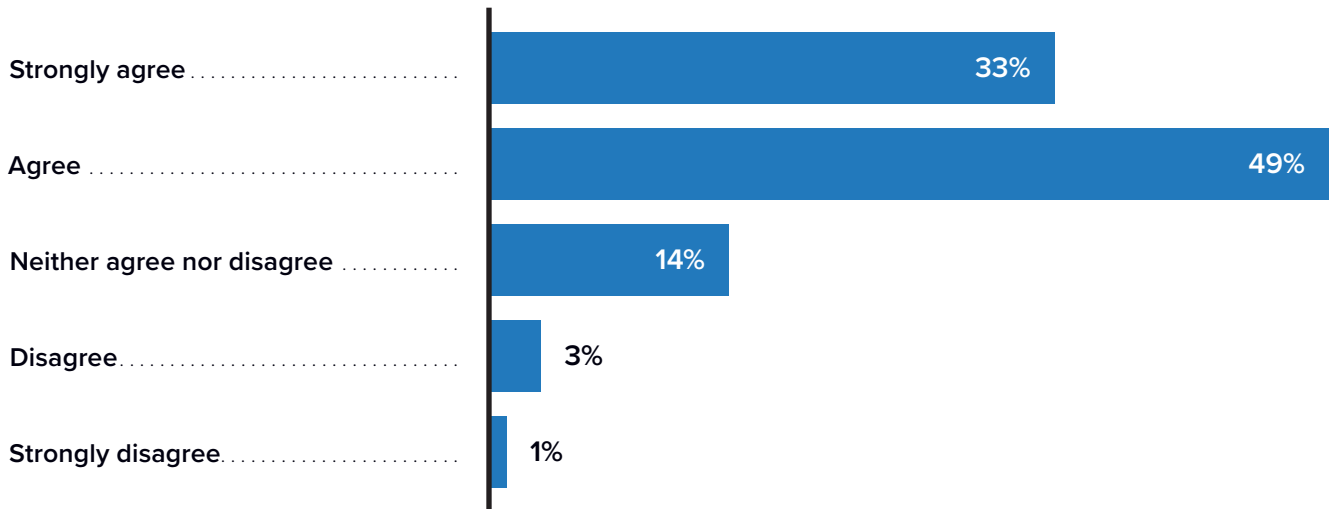
Tied to keeping the PC secure is the important topic of manageability. With a widely dispersed workforce, manageability has become an increasing challenge for IT. Still, the tools and technologies shipping with modern PCs make it easier to manage their fleets than ever before. It's worth noting that nearly four out of five respondents said their company leverages such tools to deploy and maintain its fleet (see **Figure 6**, next page).

**FIGURE 5**

**Modern PC Security**

How much do you agree with the following statement: "Modern PCs are more secure than those deployed two to five years ago."

(% of respondents)

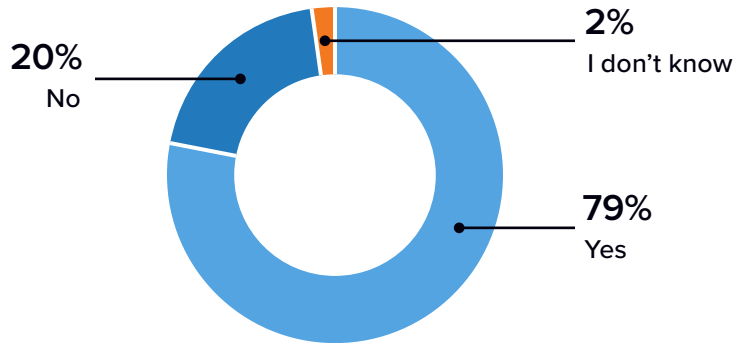


n = 785; Source: IDC's *Intel Modern PC Survey*, 2023

FIGURE 6

### Importance of PC Manageability

Does your company leverage manageability tools to deploy and maintain its PC fleet?  
(% of respondents)



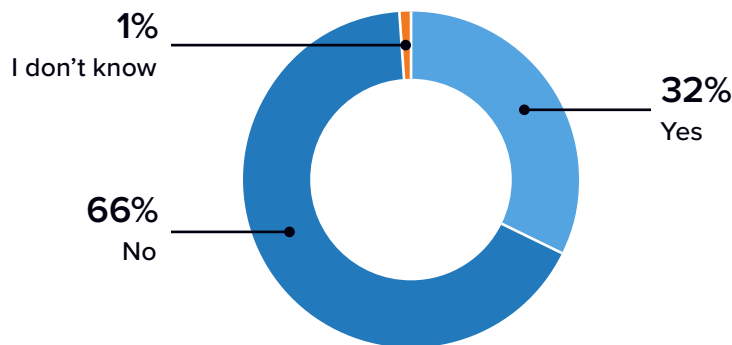
Note: % corresponds to number of respondents: totals may not sum to 100% due to rounding. n = 785; Source: IDC's *Intel Modern PC Survey*, 2023

As noted, employee recruitment and retention remain key competitive challenges for many companies. However, our research shows that too few organizations leverage key performance indicators (KPIs) tied to employee device satisfaction. Only about a third of respondents said their company currently leverages KPIs. Implementing such measurements and deploying modern PCs is key to attracting younger millennials and Gen Z employee prospects while keeping them and all employees productive and happy over time (see **Figure 7**).

FIGURE 7

### Leveraging KPIs to Track Employee Device Satisfaction

Does your IT organization leverage key performance indicators (KPIs) around employee device satisfaction?  
(% of respondents)



Note: % corresponds to number of respondents: totals may not sum to 100% due to rounding. n = 785; Source: IDC's *Intel Modern PC Survey*, 2023


## Considering Intel

Throughout this study, we've articulated the key benefits, use cases, and technologies every firm should consider as they move toward the purchase of new PCs. A vital component of any modern PC is the CPU and its underlying platform, and when it comes to commercial PCs, Intel is the undisputed market leader.

Today, Intel is driving innovation in this space with its 13th Generation Intel Core Processors, which offer high-end CPU performance features. Companies looking for best-in-class security and manageability should consider PCs that leverage the Intel vPro platform, including integrated features unavailable in any other silicon.

PCs on the Intel vPro platform are also tuned for collaboration and productivity, supported by the hybrid architecture that allocates resources to the job at hand, including collaboration apps and video calls.

Intel has designed its products from the ground up to make employees productive and happy while making IT's job of managing and securing those PCs easier.



Today, Intel is driving innovation in this space with its 13th Generation Intel Core Processors, which offer high-end CPU performance features. Companies looking for best-in-class security and manageability should consider PCs that leverage the Intel vPro platform, including integrated features unavailable in any other silicon.

# Challenges/Opportunities

Most IT organizations would love the opportunity to outfit new and existing employees with modern PCs. Still, the fact is that most IT organizations today are being asked to do more with less. And when you layer on the additional task of now being tasked with hitting targets around employee satisfaction, the challenge can seem insurmountable.

However, within this challenge lies the opportunity. Today's modern PCs can help streamline IT workloads, enhance manageability, and address complexity while simultaneously hitting important employee satisfaction targets.

# Conclusion

In the face of challenging macroeconomic headwinds, some companies will consider delaying the refresh of their PC fleets. This would be a mistake. Modern PCs represent a critical investment in the happiness and productivity of your employees and the long-term success of your business.

# About the IDC Analyst



## **Tom Mainelli**

**Group Vice President, Device and Consumer Research, IDC**

Tom manages the Device and Consumer Research Group, which covers a broad range of hardware categories, inclusive of both home and enterprise markets, as well as IDC's growing consumer research practice. The device research includes PCs, tablets, smartphones, wearables, smart home products, thin clients, displays, and virtual and augmented reality headsets. He also manages IDC's supply-side research team that tracks display and ODM production across a wide range of products. IDC's consumer practice, built upon its Consumer Technology Strategy Service, tracks numerous consumer-focused metrics utilizing frequent surveys and IDC-branded indexes. The consumer research also includes in-depth services focused on gaming and video. In his role as group vice president, he works closely with company representatives, industry contacts, and other IDC analysts to provide in-depth insight and analysis across a wide range of both commercial and consumer topics. He also oversees the collection of historical shipment data and the forecasting of shipment trends in cooperation with IDC's Tracker organization. A frequent public speaker, he travels often and enjoys the opportunity to work with colleagues and clients all over the world.

[More about Tom Mainelli](#)

# Message from the Sponsor



Intel vPro® is the unrivaled business computing foundation for organizations of all sizes. Hardware-rooted security and remote manageability capabilities let IT better support and protect users from anywhere, without having to touch the PC.

[Learn more](#)



## IDC Custom Solutions

This publication was produced by IDC Custom Solutions. The opinion, analysis, and research results presented herein are drawn from more detailed research and analysis independently conducted and published by IDC, unless specific vendor sponsorship is noted. IDC Custom Solutions makes IDC content available in a wide range of formats for distribution by various companies. This IDC material is licensed for external use and in no way does the use or publication of IDC research indicate IDC's endorsement of the sponsor's or licensee's products or strategies.



IDC Research, Inc.  
140 Kendrick Street, Building B, Needham, MA 02494, USA  
T +1 508 872 8200

 @idc

 @idc

[idc.com](https://www.idc.com)

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives.

©2023 IDC. Reproduction is forbidden unless authorized. All rights reserved. [CCPA](#)