

Drive Business Value With AI-Ready PCs For Today's Dispersed Workforce

A FORRESTER CONSULTING THOUGHT LEADERSHIP PAPER COMMISSIONED BY INTEL, AUGUST 2024

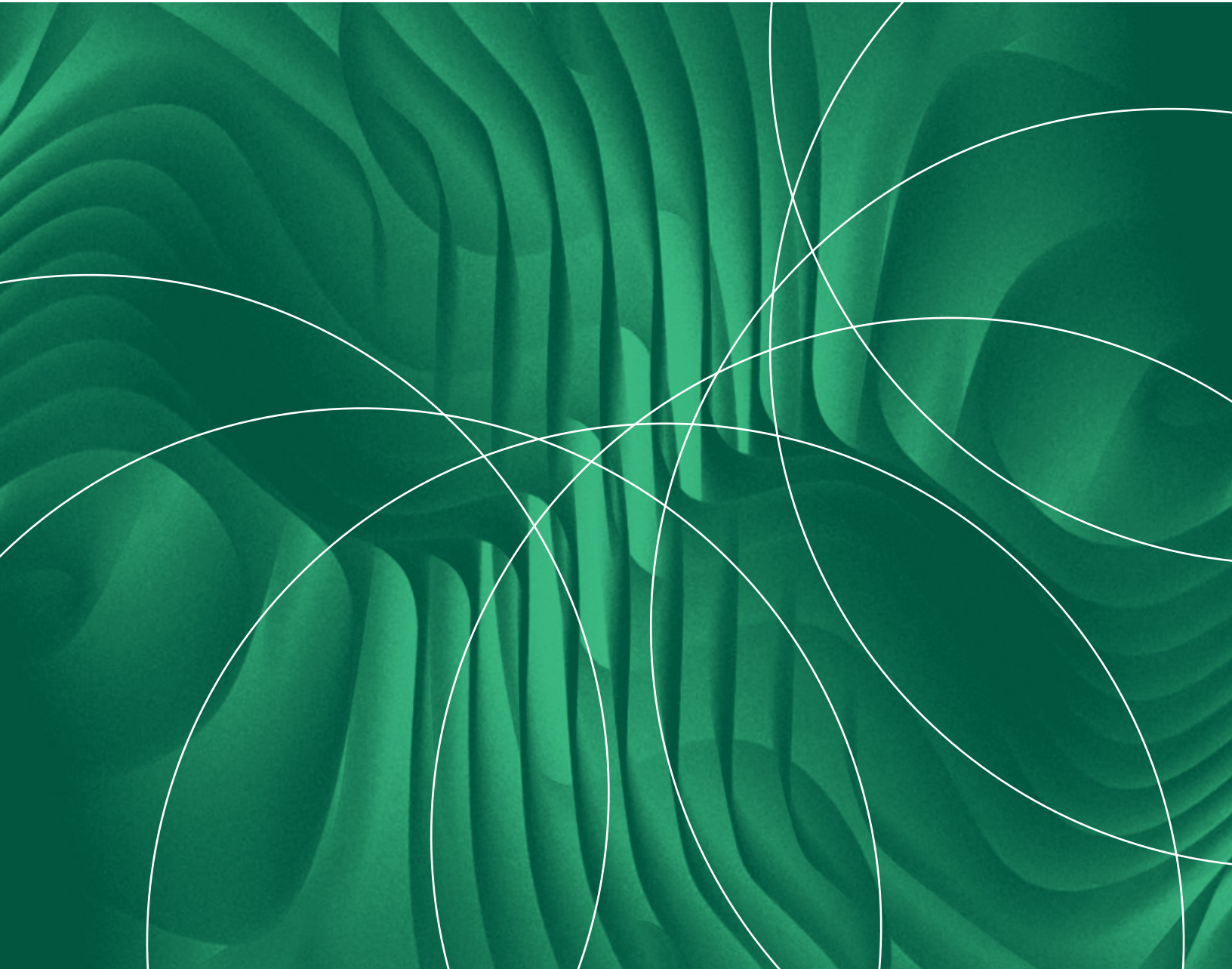


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Executive Summary

2024 has become the year of the distributed, mobile workforce, an evolution of 2020's remote work and 2022's return to office phases. Today's workers are expected to work from home, in the office, at client sites, while traveling, in coffee shops, and everywhere in-between on a weekly basis — a trend that's only expected to continue. This presents a significant challenge for IT decision-makers (ITDMs) who must empower employees to be fully productive across a diverse array of increasingly distributed locations. Organizations thus need to prioritize stable, AI-ready devices that offer the same level of high performance regardless of location.

In May 2024, Intel commissioned Forrester Consulting to refresh an ongoing study to evaluate the role of PC devices in the future of work, echoing the methodology used in 2022. Forrester conducted an online survey with 713 global end-user computing hardware purchasing decision-makers to explore this topic.

We found that many decision-makers understand the importance of providing high-performing PCs that can effectively balance today's workloads and are stable and easy to deploy in today's dispersed world. However, not all organizations have taken the necessary steps in enabling their employees in the most effective way. Key factors that differentiate highly mature organizations from less mature organizations include regularly replacing PC devices, aligning PC-buying priorities with employee demands, empowering employees to work in a hybrid setting with their PC devices, and aligning goals for a hybrid work strategy. Highly mature organizations benefit from improved employee productivity rates, better AI-readiness, and overall, more empowered employees.



Key Findings

We've entered the distributed work era. Compared with 2020 and 2021's remote workforce and 2022 and 2023's return to the office, 2024 is the time for distributed work. Today, workers are shifting locations multiple times a week, making it a top priority for ITDMs to provide employees with PCs that enable them to be fully productive anywhere.

It is more difficult to enable a mobile workforce. Employees are growing increasingly frustrated with their devices, often citing slow PC-processing speeds and low performance. With more mobile work, these complaints only grow, and ITDMs are painfully aware that enabling a mobile workforce is much harder than one that's mostly at home or in the office.

Refresh cycles are returning to normal. In 2020 and 2021, IT teams urgently supplied employees with the technology required for full-time remote work. As a result, 2022 and 2023 saw sluggish refresh cycles. In 2024 and 2025, ITDMs expect investments in PCs to increase, prioritizing PC performance and stability for these purchases.

A mobile workforce requires stable and high-performing PCs. Seventy percent of ITDMs say employees should be able to easily switch locations while working. To best support mobile work, ITDMs are investing in high-performing and stable PCs, leading to benefits like improved employee productivity, better employee experiences (EX), and increased revenue. Greater use of generative AI (genAI) means that these PCs must also be ready to handle AI workloads.

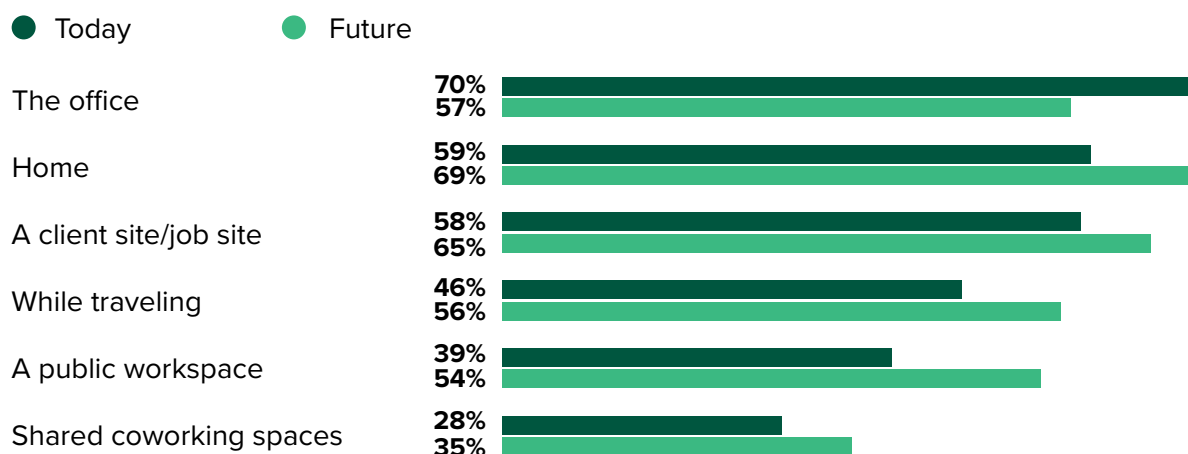
Work Today Looks Different

In the last few years, ITDMs have been adjusting to accommodate the ever-shifting challenges of enabling employees to work. The COVID-19 pandemic brought on an almost overnight change of remote work to the workforce. The workforce saw the beginnings of the hybrid model in 2022, which required employees in the office on dedicated days while also supporting remote work in the remaining days of the week. Today, we see yet another shift: Work has become more distributed. When surveying ITDMs to further understand how work today is taking shape, we found that:

- **Today's workforce is more than just hybrid.** Workers today are more likely than before to work from anywhere. ITDMs expect workers to work from the office and home most often throughout the week, but also at client sites, on the road while traveling, public workspaces, and even shared coworking spaces (see Figure 1). In fact, ITDMs expect this trend to continue increasing as employees spend more time working outside of the office.

FIGURE 1

“During a typical week, where do you expect your employees are working from? Where do you envision them working from in the future?”

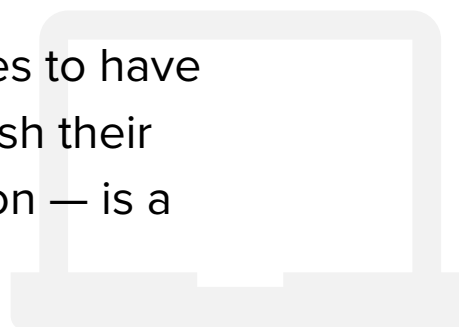


Base: 713 global end-user, computer-hardware-purchasing decision-makers with responsibility for technology selection strategy and device (PC/laptop) investment for their organization

Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, May 2024

- **Organizations are committed to making distributed work successful.** ITDMs are prioritizing technology and experiences for all employees, which will allow them to deliver on their top priority for the next year: To improve employee productivity across the company (76%). Other high and critical priorities for the coming year include creating a great experience for remote employees (72%) and investing in new end-user PC devices (62%) — both of which will enable a distributed workforce. In today's world of booming AI usage, 64% of ITDMs are also finding ways to enable AI for their employees this year.
- **A dispersed workforce requires updated tech.** The PC is central to nearly all employees' work experience.¹ Therefore, it is no surprise that 76% of ITDMs agree that hybrid work requires employees to have high-performance PCs, and 70% say the same for stable and dependable PCs. This is because ITDMs understand that these high-performing and stable PCs benefit both employees and the organization — thus prioritizing them in purchase decisions. When considering new PCs, ITDMs found some of the most important priorities to include ensuring business continuity by supplying employees with extremely stable PCs (81%), providing PCs that allow employees to be mobile (76%), giving employees high-performance PCs (75%), and ensuring that PCs allow employees to have everything they need to get everything done wherever they are (70%).

Ensuring that PCs allow employees to have everything they need to accomplish their work — regardless of their location — is a top PC priority for 70% of ITDMs.



More Working Locations Bring More Challenges

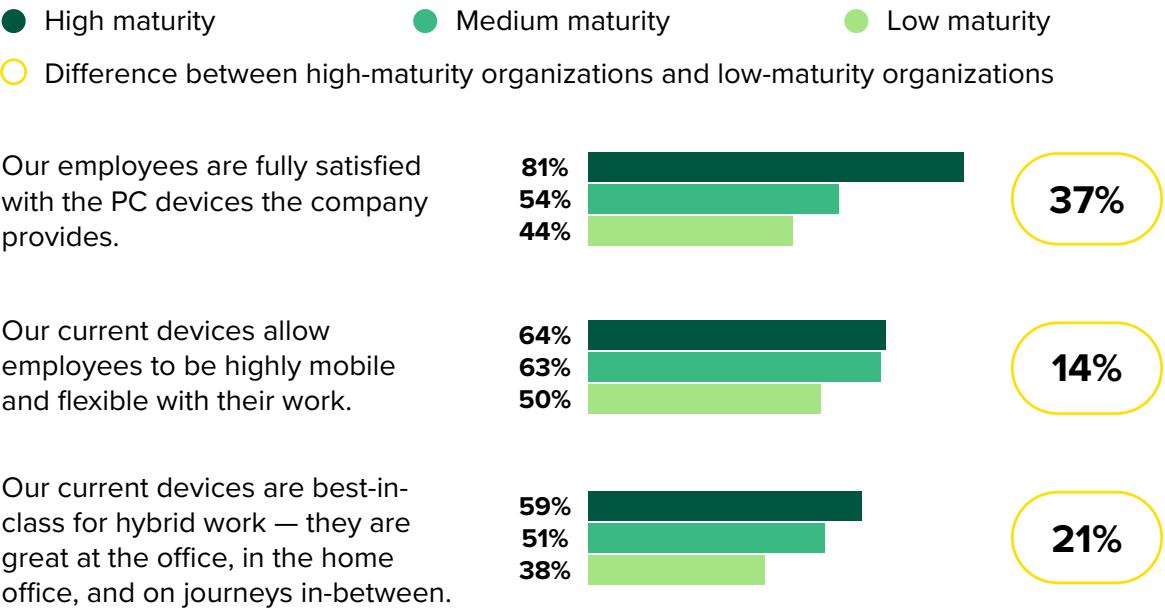
Enabling a more distributed workforce that find themselves working on the road, at home, or in coffee shops, is much more difficult than one that is predominantly remote or in the office. When employees change their work location on a daily basis, it becomes more challenging to prevent security incidents, enable hybrid collaboration experiences, and solve individual employees' PC problems.² When asking ITDMs about their current PC challenges and subsequent consequences, we found that:

- **Maturity matters for employee device satisfaction.** Overall, only 50% of ITDMs believe that the devices they provide employees are sufficient for hybrid work. However, the situation is more dire when it comes to organizational maturity. Organizations with low maturity are much less equipped to provide the best PC experience possible for their employees. Only 38% of respondents at low-maturity organizations find that their devices are best for hybrid, compared with 59% at high-maturity organizations (see Figure 2). Only 50% of respondents at low-maturity organizations find that their devices allow employees to be mobile and flexible with their work, compared to 64% of respondents at high-maturity organizations. Most jarring of all, only 44% of respondents at low-maturity organizations say their employees are fully satisfied with their PC device, while more than 81% of respondents at high-maturity organizations said the same — highlighting a stark 37% difference.

Highly mature organizations regularly replace devices, align their PC-buying priorities with employee demands, empower their employees to work in a distributed setting with their PC devices, and align their goals for a hybrid work strategy.

FIGURE 2

“Please state your agreement with the following statements.”



Base: 713 global end-user, computer-hardware-purchasing decision-makers with responsibility for technology selection strategy and device (PC/laptop) investment for their organization

Note: Showing only the sum of “Agree” and “Strongly Agree” responses

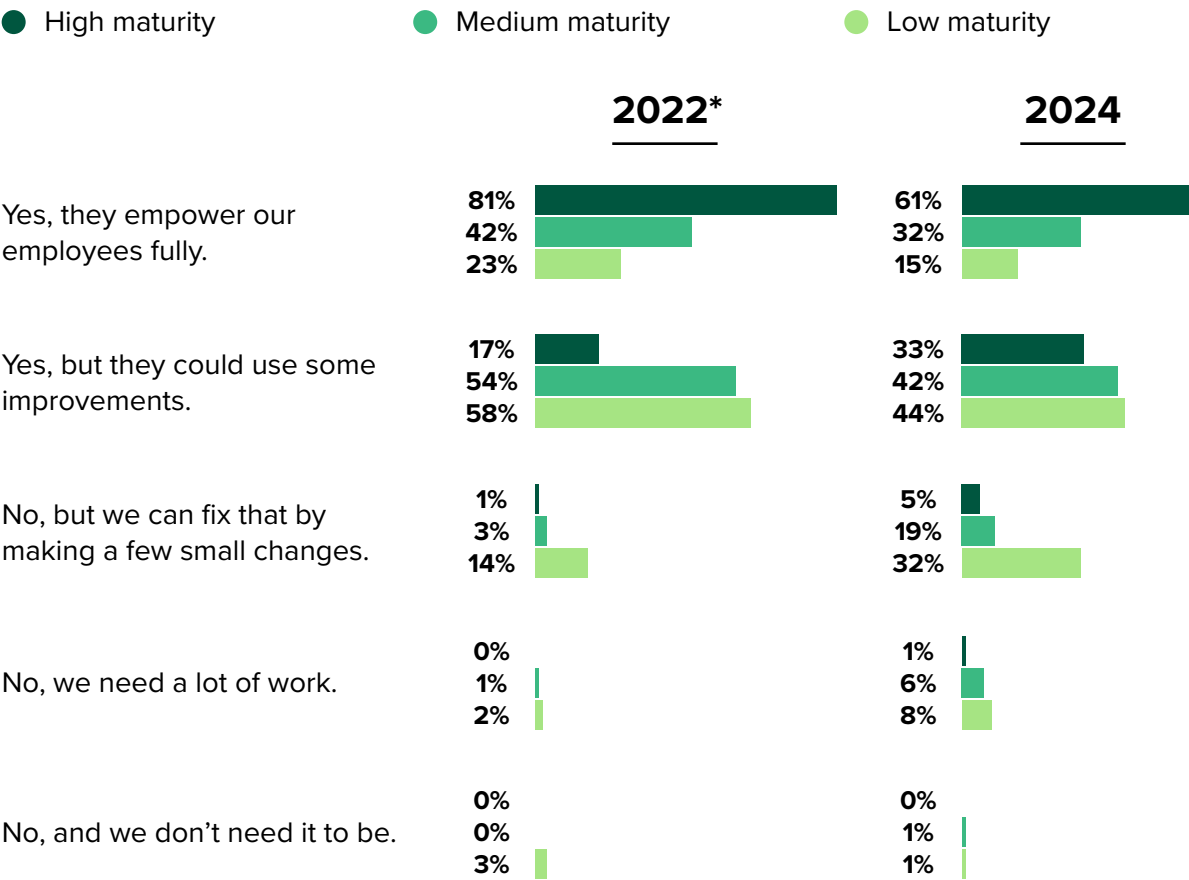
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, May 2024

- **Employees are growing more frustrated.** Today’s employees are increasingly dissatisfied with their devices, often blaming slow processing speeds, low PC performance, difficulty getting troubleshooting support from IT, and the need for frequent repairs. In contrast with 2022’s data where 19% of employees did not face any challenges, only 1% of respondents today can say the same. Unfortunately, these frustrations and challenges manifest in 67% of ITDMs noting that poor PC performance erodes employee productivity.
- **Today’s distributed work makes it harder to empower employees.** In early 2022, employees were either home or in the office — thus, almost half of ITDMs from the previous survey felt that their PCs fully empowered employees, with an amazing 81% of high-maturity firms saying the same (see Figure 3).

With employees located all over the world in 2024, ITDMs feel far less confident in the PCs they supply employees with. Overall, only 35% say their PCs fully empower employees — and even high-maturity organizations are less confident these days, with only 61% of respondents noting the same, a full 20% fewer from 2022’s data.

FIGURE 3

“Do you feel that your company’s current PC/laptop and device management platform(s) empower your employees who work in a hybrid setting?”



*Base: 611 global directors and above with responsibility over technology selection strategy and device (PC/laptops) investment for their organization
Base: 713 global end-user, computer-hardware-purchasing decision-makers with responsibility for technology selection strategy and device (PC/laptop) investment for their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021 and May 2024

The Return Of The Refresh Cycle

While devices often fall short of enabling a more mobile workforce, ITDMs know they must undergo a significant shift to better empower their employees. Eighty percent of ITDMs note that in the future, their employees should be able to collaborate the same regardless of their working location, and 70% said that their employees should be able to easily switch physical locations while working. To realize both ideals, ITDMs know they must invest in refreshing their employees' PCs. When surveying ITDMs about their plans for enabling the workforce with better PCs, we found that:

- **Refresh cycles are returning to normal.** The COVID-19 pandemic required organizations to act quickly and supply the workforce with the necessary technology to minimize disruptions as the world shifted from predominantly working in the office to remote work. In 2022, ITDMs stated that they had replaced 52% of employee devices to accommodate this remote work shift across 2020 and 2021. As a result, there was a very low PC refresh rate of 28% in 2022 and 2023 as the demand fell following the highs from the years prior. In the next two years, ITDMs expect that refresh cycles for employees' PCs will become more normal at a 41% rate of replacement. Regardless of maturity, organizations expect to be increasing investment in PC refresh and upgrades to high-performance PCs to enable today's dispersed workforce (see Figure 4).

FIGURE 4

Organizations Plan To Invest In PCs As Refresh Cycles Return To A Normal Cadence

- High maturity
- Medium maturity
- Low maturity

We will be increasing our investment in PC refresh to better enable our dispersed workforce.



My company plans to invest in/upgrade employees to higher-performance devices.



Base: 713 global end-user, computer-hardware-purchasing decision-makers with responsibility for technology selection strategy and device (PC/laptop) investment for their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, May 2024

- **Purchasing decisions stem from the need to improve EX.** The top priority for organizations this year is to increase employee productivity. This hinges on factors like improving EX — as 75% of ITDMs note, reliable PC devices improve EX. It is therefore unsurprising that for nearly 80% of ITDMs, improving EX is a key driver for investing in PCs. Seventy-six percent of ITDMs also note that a PC's performance is the most important driver for a purchasing decision, and 69% say the same for the reliability and stability of a PC.

71%
of ITDMs are increasing
their investment in
PC refresh to better
enable their dispersed
workforce.

- **Computer performance and reliability top PC wish lists.** When asked about the top factors prioritized when selecting end-user PC devices for employees, computer performance (66%) and computer reliability (62%) often bubbled to the top, a trend that continues from 2022. The same themes also arose when asked to rank specific PC features and functionality in a wish list. Seventy percent of ITDMs say the top priority is reliable PC performance. The following top wish list items include faster performance (62%) and consistent PC stability (58%).

MAKING WAY FOR THE AI PC

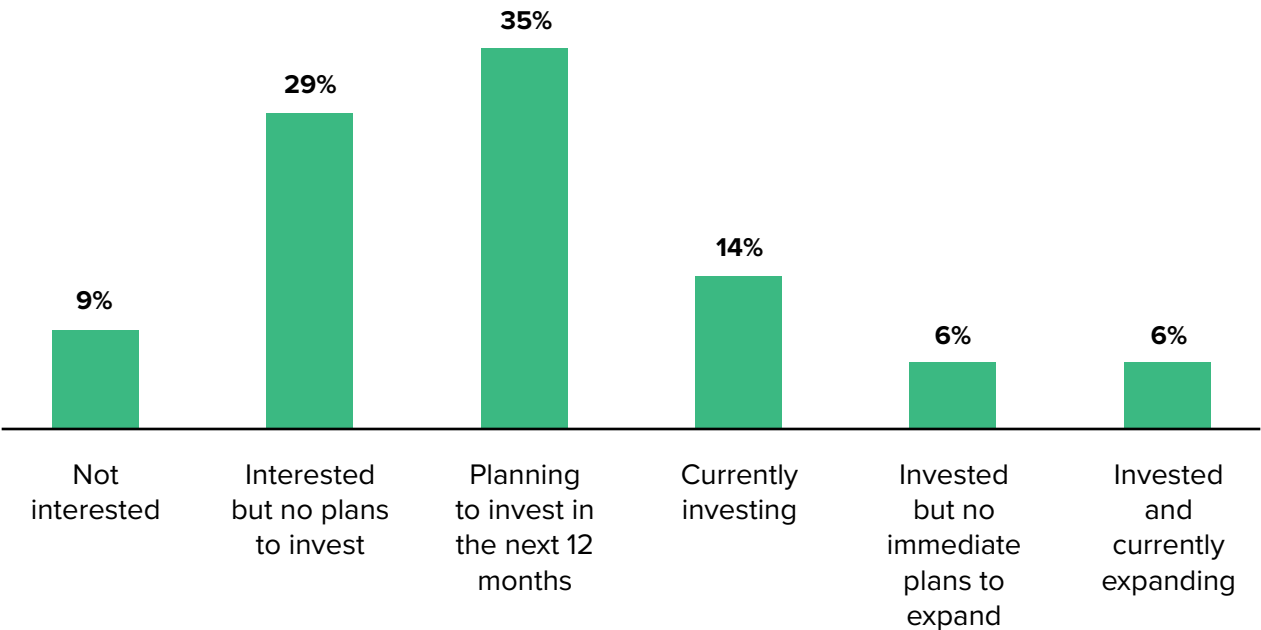
Since late 2022, AI has dominated the conversation, promising to boost employee productivity, improve collaboration experiences, and fast-track innovation, along with many other benefits. As employees' AI usage continue to grow, it becomes increasingly impractical for most AI processing to happen within cloud services. Enter the AI PC: a PC embedded with an AI chip and algorithms designed to improve the experience of AI workloads across the computer processing unit, graphics processing unit, and neural processing unit.³

AI PCs promise to improve security, increase organizational innovation, and improve collaboration tools — while reducing costs. These PCs have firmly entered the conversation, causing many ITDMs to consider adopting them

due to their ability to run AI natively, which is one of the factors on ITDMs’ PC wish lists today. However, IT departments and decision-makers are not ready for a few reasons. For one, only more mature organizations understand that employees in the future will need the necessary power to run AI applications locally on their PCs, meaning that less-mature organizations are not yet getting budgets for AI PCs in line although interest is high, with 29% of respondents saying they are interested in AI PCs but have no plans to invest in them yet, and an additional 35% saying they plan to invest in AI PCs in the next 12 months (see Figure 5).

FIGURE 5

“What is your organization’s interest level in AI PCs?”



Base: 713 global end-user, computer-hardware-purchasing decision-makers with responsibility for technology selection strategy and device (PC/laptop) investment for their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, May 2024

Drive Organizational Value With Stable, High-Performing, And AI-Ready PCs

Organizations that invest in more stable, reliable, and high-performing PCs are best positioned to make today's distributed work successful. Employees today and of the future are inevitably going to work in multiple different locations throughout the week, and insufficient PCs will only hamper productivity. In fact, empowering employees with the best PCs for their work brings benefits across the organization. Specifically, we found that investing in high-performing and stable PCs means:

- **Organizations can deliver on their top priorities.** Two of the top priorities organizations set for the next 12 months are to increase productivity and improve EX. Investing in high-performing and stable PCs improved employee productivity for 57% of ITDMs — a benefit that organizations with high maturity realize at a 10% greater rate than less-mature organizations — and 51% of ITDMs see better EX (see Figure 6). A further 43% of ITDMs note that these PCs provide greater compatibility for a future for anywhere work. As employees increasingly desire the ability to use AI, these PCs also enable employees to use AI applications more (55%) and offer them faster response times when using AI (45%).
- **Fewer trips to the help desk.** A top frustration employees have with today's PCs is that they spend too much time receiving troubleshooting support and require repairs too frequently.

FIGURE 6

Top Employee-Focused Benefits Of Investing In High-Performing And Stable PCs

57% Improved productivity



55% Greater ability to use AI applications



51% Better EX



45% Faster response times when using AI



43% Greater compatibility with a hybrid office and anywhere-work future



Base: 713 global end-user, computer-hardware-purchasing decision-makers with responsibility for technology selection strategy and device (PC/laptop) investment for their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, May 2024

Investing in stable, reliable, and high-performing PCs means that IT departments receive fewer help desk calls (52%) and complaints from employees (41%), so they can subsequently spend more time on higher-value projects (45%).

- **Improvements to the bottom line.** Improving EX and increasing productivity with stable and high-performing PCs yield benefits for the business overall. Providing better-performing PCs means that employees can improve productivity through methods like automation and AI — 53% of ITDMs note that this enables benefits such as an increased rate of innovation. Furthermore, having more productive employees increases revenue, a benefit realized by 50% of ITDMs.

Key Recommendations

While work has transformed significantly since our first study in 2022, the need for high-performance, stable PCs has stayed consistent. The anomalously high refresh rate for PCs in 2020 and 2021 leaves too many employees in late 2024 and 2025 with antiquated devices that hinder productivity and EX.

Forrester's in-depth survey of ITDMs about workforce PCs yielded several important recommendations:

Aim to move up the maturity stack.

High-maturity organizations replace devices regularly, align their PC-buying priorities with employee demands, empower their employees to work in a distributed setting with their PC devices, and align their goals for a hybrid work strategy. Increasing organizational maturity requires aligning with decision-makers across your organization who have yet to immediately understand the centrality of high-performance, stable PCs to employee productivity — for instance the CFO, procurement team, business leaders, and HR leaders. Building this alignment and demonstrating the value of PCs through storytelling is a key strategic task for end-user computing professionals.

Measure the value of PC investments via employee feedback.

An increasing number of organizations seek to quantify productivity, but this is hard to do for knowledge work and can violate privacy norms or even laws. A better and more effective approach lies in employee listening programs. Leverage focus groups, pulse surveys, EX surveys, discussions on internal social media, and feedback and problems submitted to the help desk to aid your storytelling and business case. Employees who face the distributed and mobile working environment can also offer tangible examples of why they need newer, higher-performing, and stable PCs.

Prepare for a new world of computing.

As employees use more genAI-based software, they will need PCs that are capable of using it. Even SaaS-based genAI works better on high-performance PCs. Soon, companies will want to push some of the compute to the edge to alleviate the economic and environmental costs of escalating cloud-based use. AI PCs will be the next evolution of distributed, work-from-anywhere devices, driving productivity for workers no matter their physical context.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 713 global end-user, computer-hardware-purchasing decision-makers with responsibility for technology selection strategy and device (PC/laptop) investment for their organization. Respondents were offered a small incentive as a thank-you for time spent on the survey. The study began in May 2024 and was completed in June 2024.

Appendix B: Demographics

REGIONS	
APAC	43%
EMEA	43%
North America	14%

COMPANY SIZE	
Enterprise	34%
Medium	34%
Small	33%

TOP SIX INDUSTRIES	
Technology and/or technology services	7%
Retail	7%
Business or professional services	6%
Energy, utilities, and/or waste management	5%
Construction	5%
Financial services and/or insurance	5%

CURRENT POSITION/DEPARTMENT	
IT	62%
Procurement	38%

LEVEL OF RESPONSIBILITY	
C-level executive	13%
Vice president	23%
Director	29%
Manager	34%

Note: Percentages may not total 100 due to rounding.

Appendix C: Endnotes

¹ Source: [Master The Messy Middle Of Hybrid](#), Forrester Research, Inc., September 28, 2022.

² Source: [The Anywhere-Work Guide For Tech Pros, 2022](#), Forrester Research, Inc., May 16, 2022.

³ Source: [The Year Of The AI PC Is 2025](#), Forrester Research, Inc., March 28, 2024.



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