

IDC InfoBrief  
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# The Future of Hybrid First Organizations: Parity Is the Key

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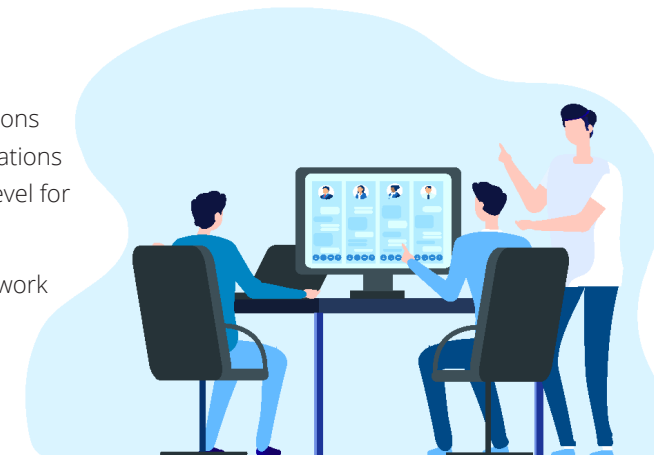
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# Executive summary

Globally, organizations are planning to move toward hybrid work models. With around 60% of employees preferring to work in hybrid models, organizations that provide flexibility will bring a competitively differentiated employee experience. However, IDC's hybrid work maturity framework reveals that organizations are at different stages of readiness. The majority of organizations are still on their journey to reach the Hybrid First stage, which is the highest maturity level for hybrid work.

This InfoBrief draws insights from 700 IT and business decision makers (ITBDMs) in a global study commissioned by Dell. It provides insights into hybrid work maturity across the US, Western Europe, and Asia/Pacific, and covers four industries: **banking, financial services, and insurance (BFSI); media and entertainment (M&E); education; and design (architecture, engineering & construction and manufacturing).**



## Key takeaways



ITBDMs across regions and industries are planning to nearly double their hybrid workforce in the next 12–18 months. But the **majority of organizations still have not reached the Hybrid First stage.**



Globally, **the US** is ahead of other regions in reaching Hybrid First work models. By industry, **BFSI** is progressing faster than the others in reaching the Hybrid First stage.



Out of the five dimensions of hybrid work maturity, **most organizations are lacking in technology parity and experience parity.** IDC defines “parity” as employees having equal access to technologies and the same work experience regardless of their work locations (onsite, remote, or hybrid). To move forward, organizations must invest in technologies (both software and devices) to enhance these two dimensions.



Organizations are planning to redesign the office to accommodate hybrid work such as **upgrading meeting rooms** and **increasing the number of hot desks** to support the growing hybrid workforce. It is imperative for organizations to consider both technology parity and experience parity to ensure employee productivity and work experience in the Hybrid First stage.

## Key data points



Globally, the number of organizations with more than 50% of employees in hybrid work models will **increase from 25% to 44%** in the next 12–18 months.



**More than 80%** of organizations are not in the Hybrid First stage (Stage 4).



**Nearly 75%** of organizations globally plan to upgrade their meeting rooms with video conferencing technology and devices (displays, monitors). **Around 30%** are planning to turn a proportion or all of their dedicated desks into hot desks.



Organizations are planning to invest in technologies that enable hybrid work, such as **security solutions, new IT hardware** (e.g., monitors, laptops), and **cloud solutions.**

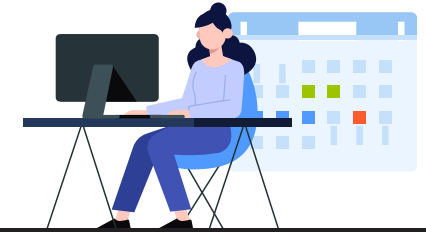


The **most preferred monitor features** (next 12–18 months) are **collaboration features**, such as built-in cameras, speakers, and microphones, **larger screen size**, and **faster connectivity** (USB-C).

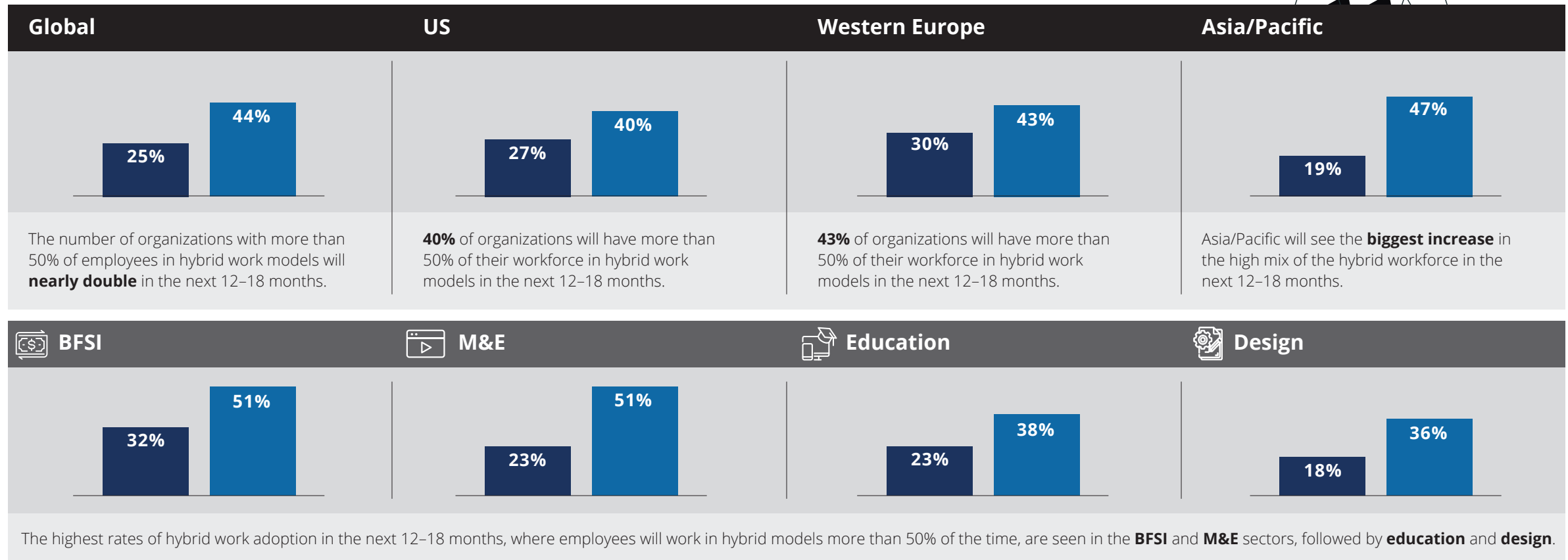
# The hybrid workforce will nearly double in the next 12–18 months

More than two years of hybrid and remote work have made organizations realize that their business operations can run effectively under hybrid work models. Organizations across all regions are planning to significantly increase their hybrid workforce to over 50% in the near future (next 12–18 months).

Across industries, hybrid work models are also expected to increase with some variation in the rate of hybrid adoption.



## Organizations with more than 50% of employees in hybrid work models — now vs next 12–18 months



■ Now ■ Next 12-18 months

# The four stages and five dimensions of hybrid work maturity



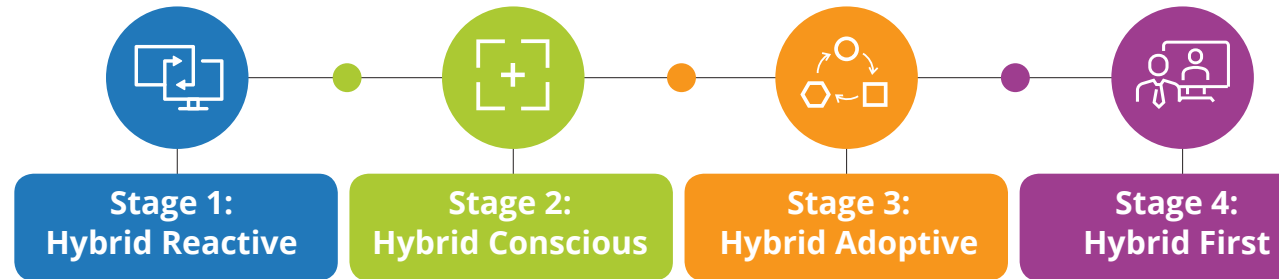
IDC's Future of Work Global Survey shows that all organizations have adopted or will adopt hybrid work models to some extent in 2022. In addition, findings from this IDC study commissioned by Dell indicate that the hybrid workforce will nearly double in the next 12-18 months.

To evaluate where organizations are on their Hybrid First transformation, IDC created a **hybrid work maturity framework comprising four stages: Hybrid Reactive, Hybrid Conscious, Hybrid Adoptive, and Hybrid First** (see Appendix: Four stages of hybrid work maturity). Each stage builds on the capabilities of the one that immediately precedes it.

In the Hybrid First stage, where organizations reach the highest maturity level, employees have all hybrid working skills to empower them to work effectively and have the same work experience regardless of their locations.

In addition, there are **five dimensions for hybrid work maturity, namely strategies, skills, processes, technology parity, and experience parity**. Each dimension contributes to an organization's ability to progress, as they achieve a higher level of hybrid work and work transformation maturity.

## Four stages of hybrid work maturity



Hybrid First is the goal for organizations. **The sooner they reach the Hybrid First stage, the more competitive they are in the digital-first economy.**

## Five dimensions of hybrid work maturity in Stage 4: Hybrid First

	<b>Strategies</b>	Hybrid is the default work style and fully implemented enterprise-wide with decisions made at the team level.
	<b>Skills</b>	Long-term needs for hybrid work styles and skill gaps have been fully identified. The organization has a skills road map in place.
	<b>Processes</b>	Processes are fully overhauled and transformed to fully support employees regardless of work location.
	<b>Technology parity</b>	The organization leverages technologies to fully transform employee productivity and compete in the marketplace.
	<b>Experience parity</b>	Employees get a consistent, personalized experience no matter which device and where they work from.

# More than 80% of organizations are not ready for Hybrid First

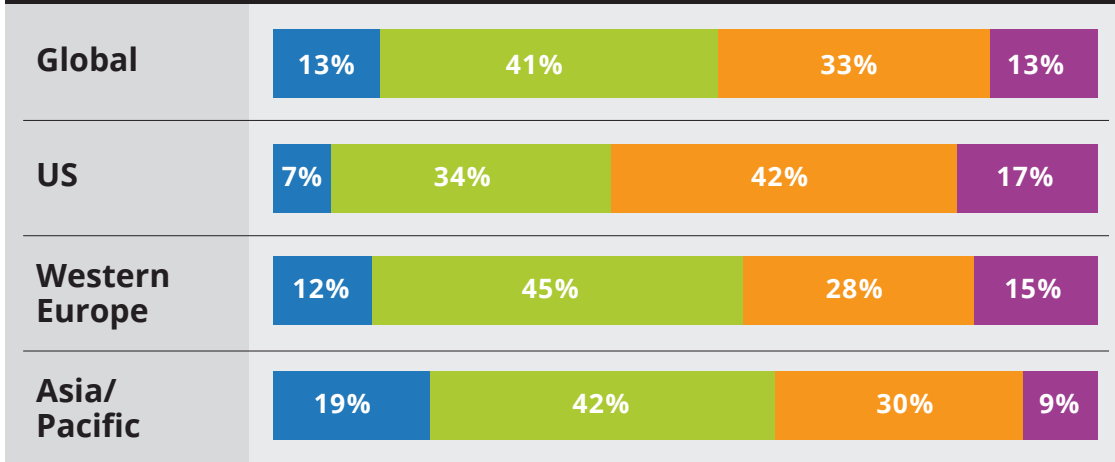
IDC assessed 700 organizations globally with the hybrid work maturity framework. According to the findings, even though organizations are planning for hybrid work models, most of them are still in the Hybrid Conscious (41%) and Hybrid Adoptive (33%) stages.

## Regional view



US organizations are ahead in the hybrid work maturity journey, with **17%** in the Hybrid First stage, compared to **15%** in Western Europe and **9%** in Asia/Pacific.

### Hybrid work maturity by region



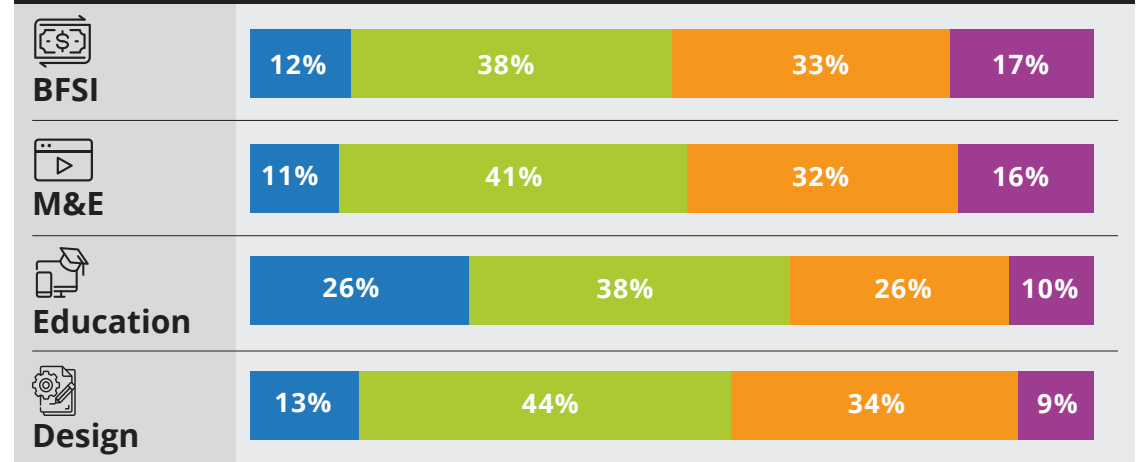
## Industry view



BFSI organizations lead in the hybrid work maturity journey, with **17%** in the Hybrid First stage, followed by M&E (**16%**), education (**10%**), and design (**9%**).

The education sector stands out with **more than a quarter** of organizations still in the Hybrid Reactive stage. Educational institutions relied on in-person interactions before the pandemic, and key challenges remain in the transition to a hybrid model. Device procurement and remote device management rank among the top technology challenges in ensuring effective remote learning and teaching.<sup>1</sup>

### Hybrid work maturity by industry



■ Stage 1: Hybrid Reactive ■ Stage 2: Hybrid Conscious ■ Stage 3: Hybrid Adoptive ■ Stage 4: Hybrid First

# Hybrid work maturity dimensions: Strategies, skills, and processes are the best-performing, while technology and experience parity are still lacking



The five dimensions of hybrid work maturity — strategies, skills, processes, technology parity, and experience parity — are interconnected, and organizations must excel in all five to move forward in their hybrid work maturity journey.

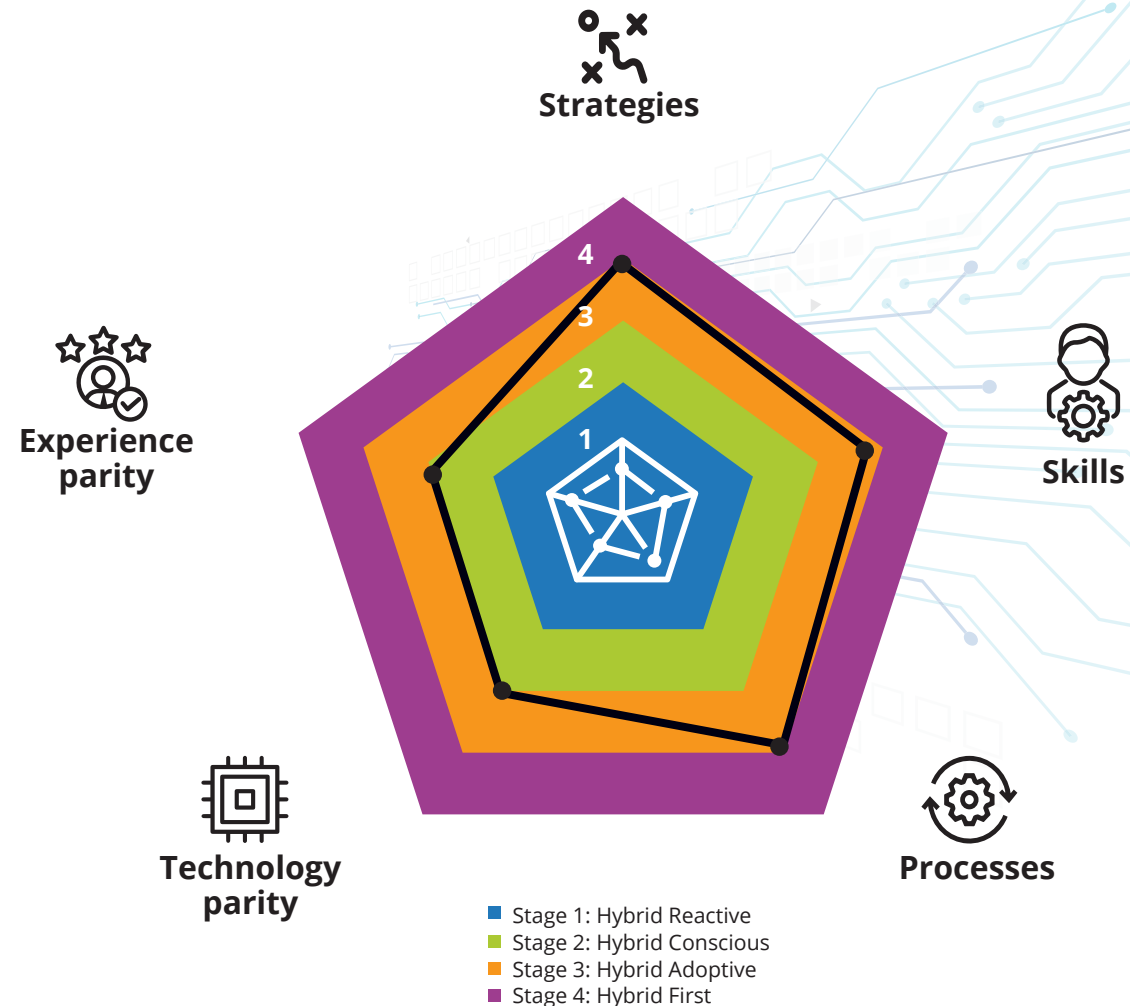
Based on this IDC study, many organizations are ramping up their **strategies, skills, and processes** for their Hybrid First transformation, with around half of organizations in the Hybrid First stage in these three dimensions.

However, the technology parity and experience parity dimensions are currently lagging and will need more focus from ITBDMs.

The **technology parity dimension comprises four subdimensions**: devices (hardware), applications (software), security systems, and connectivity (network). **The majority (80%)** of organizations globally are not yet in the Hybrid First stage of this dimension.

The **experience parity dimension comprises three subdimensions**: workstation parity (e.g., ergonomic desks and chairs), device experience parity (enhanced user experience and well-being by providing devices such as monitors with higher resolution, blue-light reduction, and color precision), and employee engagement. **Around 70%** of organizations across all industries have not reached the Hybrid First stage in experience parity.

## Five dimensions of hybrid work maturity

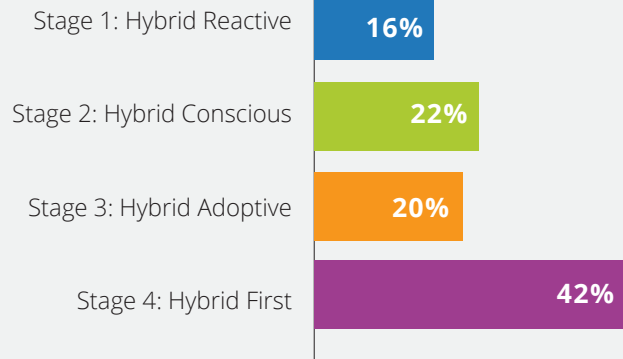


# Around 50% of organizations have reached the Hybrid First stage in the strategies, skills, and processes dimensions

The strategies, skills, and processes dimensions are the three best performing out of the five hybrid work maturity dimensions.

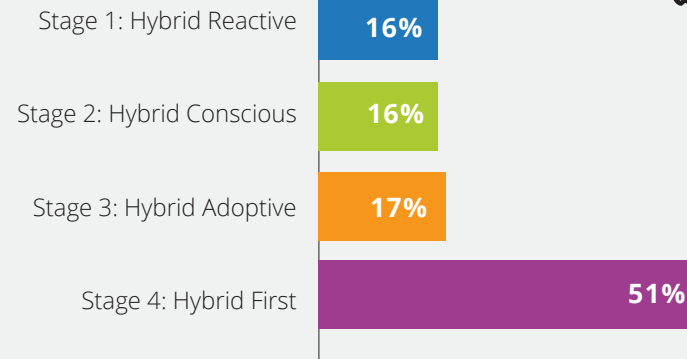


## Strategies



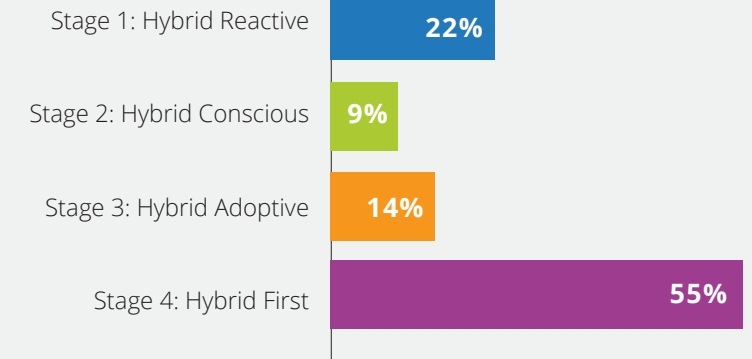
For hybrid strategies, ITBDMs are planning to significantly increase the ratio of hybrid workers in their overall workforce. Currently, **42%** of organizations have Hybrid First strategies.

## Skills



Digital hybrid working skills have improved after remote work in the last two years. Employees are more adept in digital hybrid work skills such as using online conferencing tools, online collaborations, VPN access, and remote access to data. **Half** of organizations are in the Hybrid First stage for skills.

## Processes



**More than half** of organizations have transformed their processes to be automated using artificial intelligence (AI), machine learning, and robotic process automation to support their remote workforce in the past two years.

# Only 18% of organizations have reached the Hybrid First stage in technology parity

As the fourth dimension of IDC's hybrid work maturity framework, technologies are the backbone of business transformation. While the majority of organizations globally are in the second and third stages, there is a wide variety in technology parity scores in different regions.

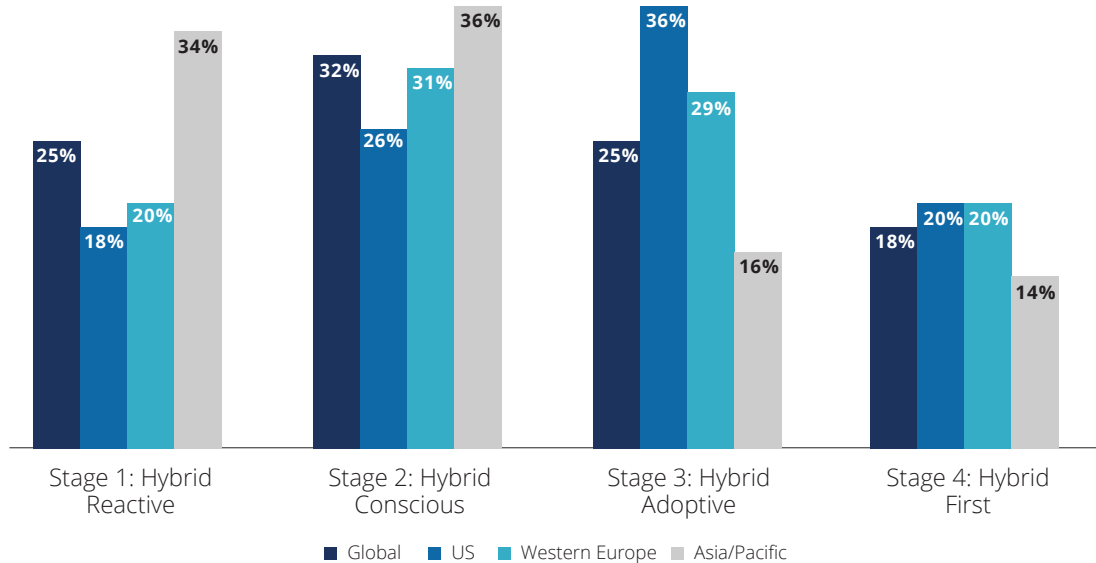


## Regional view



- Only **18%** of organizations globally are in Stage 4.
- The US is more advanced with **more than half (56%)** of organizations already in Stages 3 and 4.
- 34%** of Asia/Pacific organizations are lagging in Stage 1.

## Technology parity by region

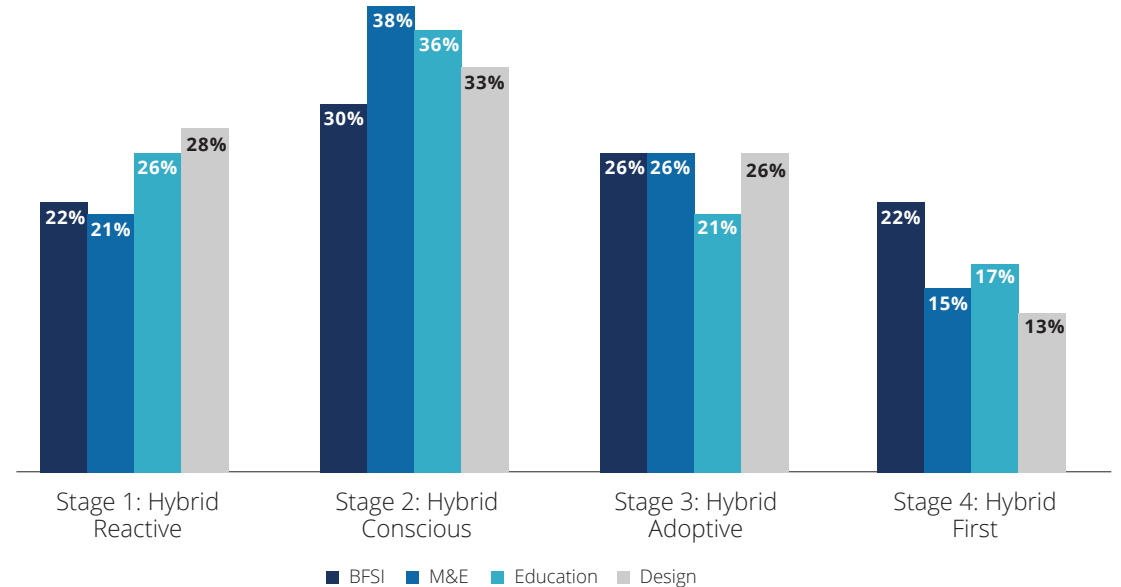


## Industry view



- The BFSI industry is ahead of the other sectors with **48%** in Stages 3 and 4.
- More than half of the education (**62%**) and design (**61%**) organizations are in Stages 1 and 2.

## Technology parity by industry





# 60% of organizations have not yet reached the Hybrid First stage in the experience parity dimension

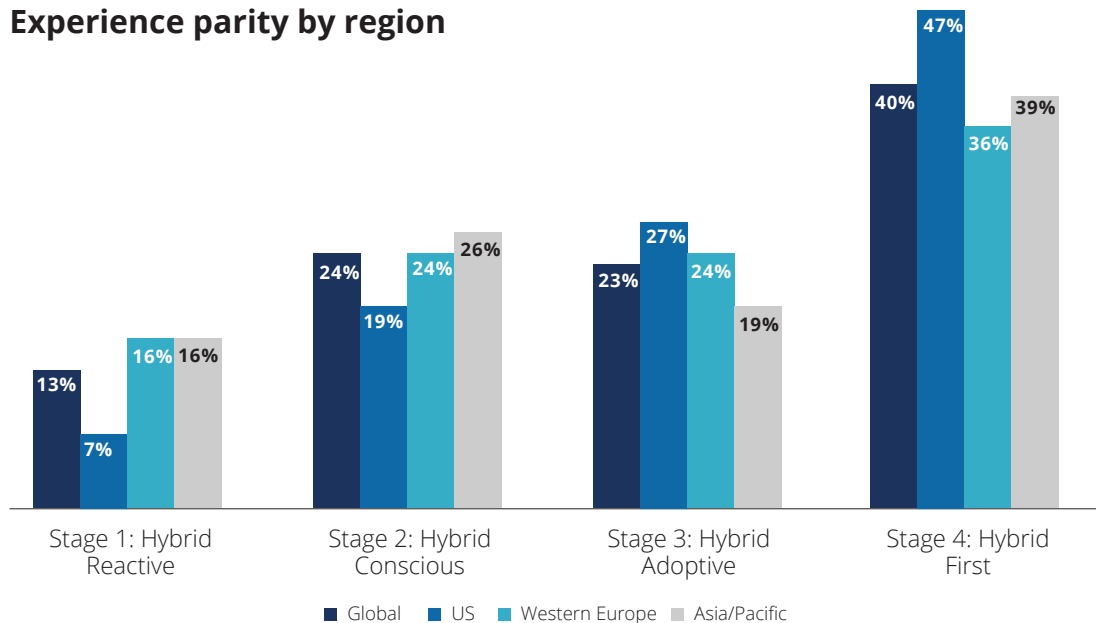


## Regional view



- ▶ In the experience parity dimension of the hybrid work maturity framework, **60%** of organizations globally are not yet in the Hybrid First stage.
- ▶ The US is leading in experience parity, with **47%** in the Hybrid First stage and only **7%** in the Hybrid Reactive stage.

## Experience parity by region

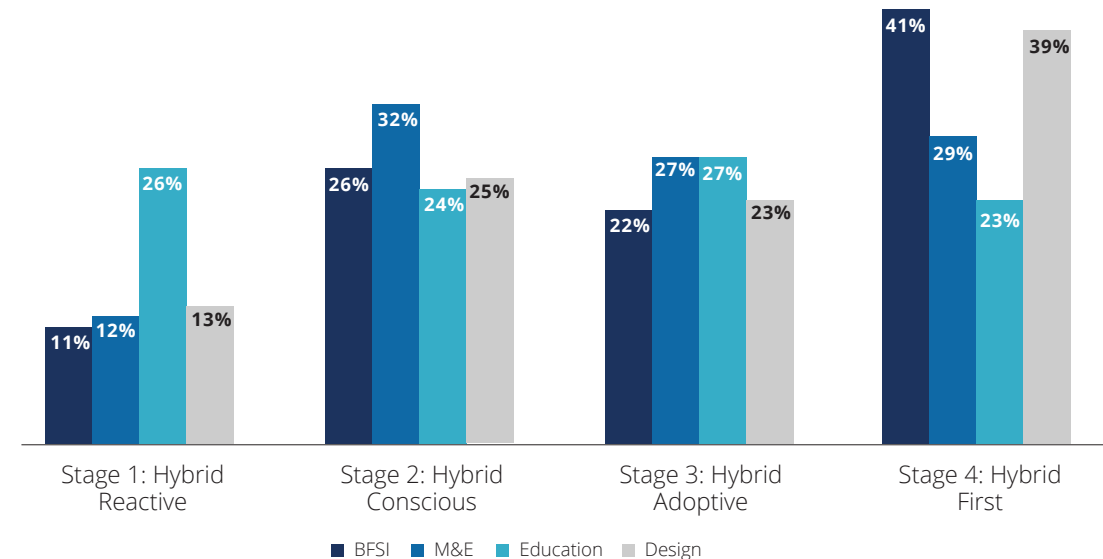


## Industry view



- There is a wide variation in experience parity across industries.
- ▶ The BFSI sector is leading in terms of experience parity, with **41%** in the Hybrid First stage.
  - ▶ The education sector is lagging compared to the other industries. A digital divide is also emerging as education moves to hybrid models. A previous study by IDC found that home devices with the right technologies, including monitors, are imperative to conducting effective online classes.<sup>2</sup>

## Experience parity by industry



# Ensuring technology consistency for employees is the top challenge for hybrid work

Hybrid work requires consistent access to resources and data, and IT support for both the remote and onsite workforce. Globally, organizations' **top challenges in implementing hybrid work** are centered on technology consistency, security, and team collaboration.

**Technology consistency** for employees is a top challenge for organizations as many are still focusing on equipping onsite employees with devices such as monitors, video conferencing equipment, and peripherals.



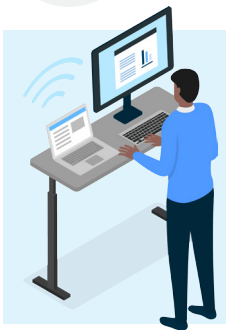
**Monitors:** 54% of organizations currently provide monitors for onsite employees, but only 38% for remote and 39% for hybrid employees.



**Laptops:** As the predominant computing device, **laptops** are provided by **more than 50%** of organizations across all locations. With the limited USB ports on laptops, monitors and docks that extend USB ports can provide more connectivity options.



**Peripherals:** 39% of organizations currently provide peripherals for onsite employees, 34% for remote employees, and 36% for hybrid employees.



The **gaps in device provision**, particularly for productivity and experience enhancing devices (monitors, video conferencing equipment, and peripherals), show the current preference for onsite device provision over hybrid or remote models. In a previous IDC study, 61% of employees globally said pairing a laptop with a monitor improved their productivity.<sup>3</sup> To ensure technology parity and experience parity, **organizations must evaluate the need for relevant devices for each work style and provide them accordingly.**

## Top challenges for hybrid work



**Technology consistency** for employees across hybrid/remote and onsite work environments

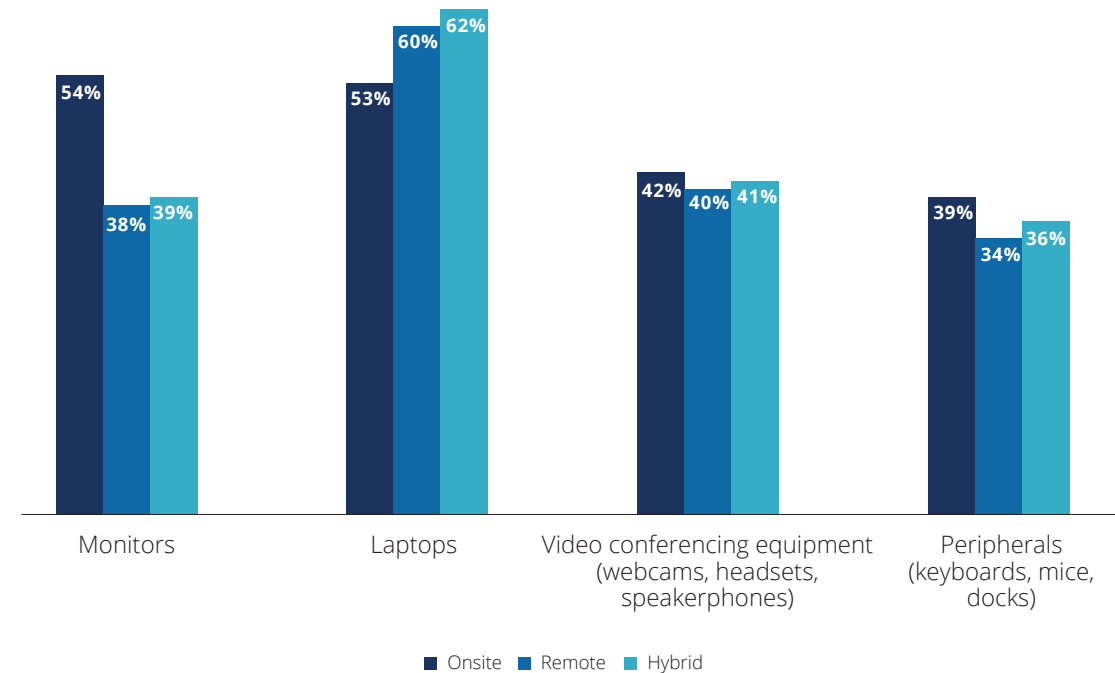


**Security** of home network



**Team collaboration** across in-person and remote environments

## Devices currently provided to onsite, remote, and hybrid employees



# Most organizations struggle with providing technology parity, particularly in the devices subdimension

The four subdimensions in the technology parity dimension are devices, applications, security systems, and connectivity. This IDC study reveals that organizations are struggling to provide technology parity for Hybrid First, especially with devices.



In the **devices** subdimension, **27%** are in Stage 2 and **38%** are in Stage 3. The relatively low maturity means devices is an area that ITBDMs need to carefully consider in their hybrid transformation.



**11%** of organizations are still in Stage 1, where most devices have basic features, and there are almost no premium monitors and other devices for onsite workers.



**27%** are in Stage 2, where access to premium monitors and devices is mostly available for onsite workers. Employees with specialized tasks (e.g., visualization, design, trading) that require premium monitors or devices must work onsite (office).

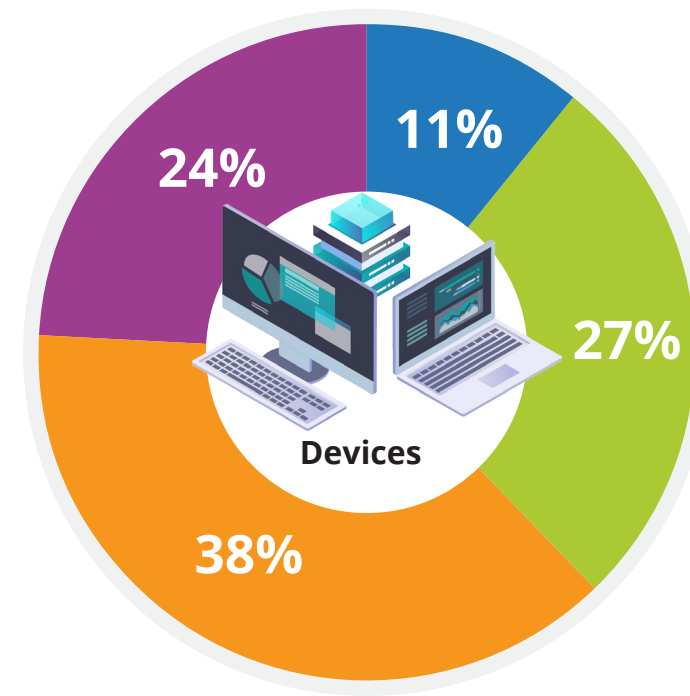


**38%** of organizations are in Stage 3, where many business-critical functions (e.g., accounting, design, trading) have dedicated premium monitors and devices for their hybrid work and job functions.



Only **24%** are in Stage 4, where employees are provided premium devices for hybrid work and relevant to job functions, such as larger and better-quality monitors with collaboration features.

## Devices subdimension — global view



■ Stage 1: Hybrid Reactive ■ Stage 2: Hybrid Conscious  
 ■ Stage 3: Hybrid Adoptive ■ Stage 4: Hybrid First



**To become a Hybrid First organization, organizations must focus on providing device parity (such as monitors, peripherals, and laptops) for employees both onsite and remote.**

# Organizations are lacking when it comes to providing experience parity across employee engagement, workstations, and devices

The three subdimensions of experience parity include employee engagement, workstation parity, and device experience parity.



**75%** of organizations have not reached the Hybrid First stage in **employee engagement**, which prioritizes two-way communication with employees via both face-to-face and digital tools.



**70%** of organizations have not reached the Hybrid First stage in **workstation parity** for their employees in the office or at home, such as providing them with ergonomic chairs and desks to create a more conducive work environment that suits their workstyles.

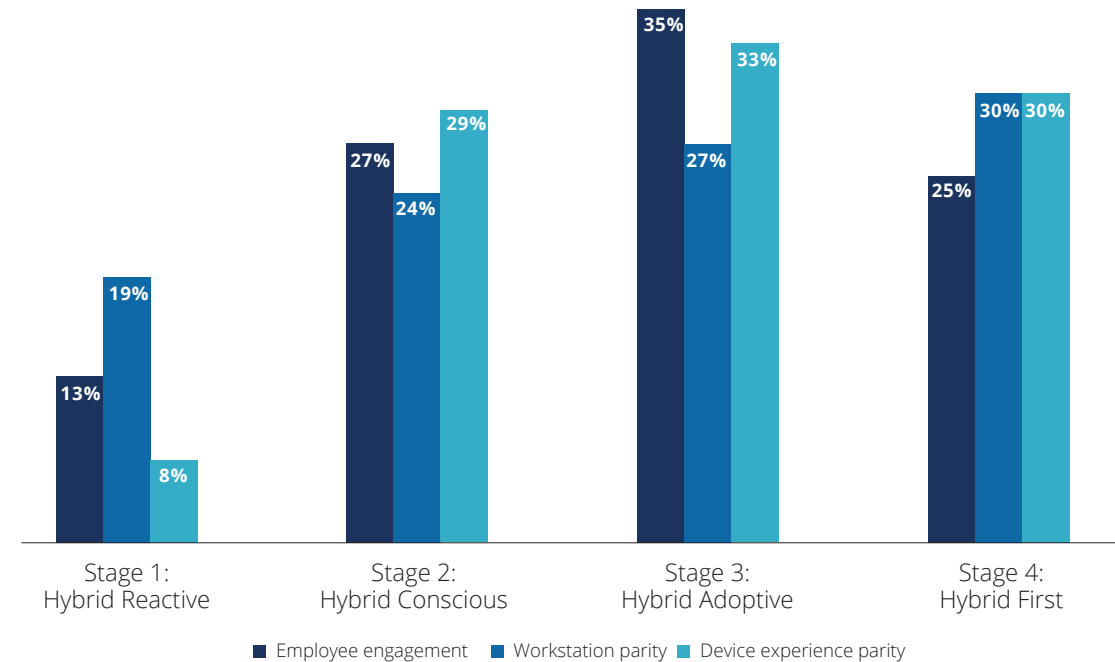


**70%** of organizations have not reached the Hybrid First stage in **device experience parity** for their hybrid workforce to increase their comfort, well-being, and work experience, for example, by providing monitors with higher resolution, blue-light reduction, color precision, and enhanced ergonomics.



**In Hybrid First organizations, employees get a consistent, personalized experience no matter which device and where they work from.**

## Experience parity subdimensions — global view



# Initiatives like tech upgrades and use of analytics to improve employee experience are still limited



## Regional view

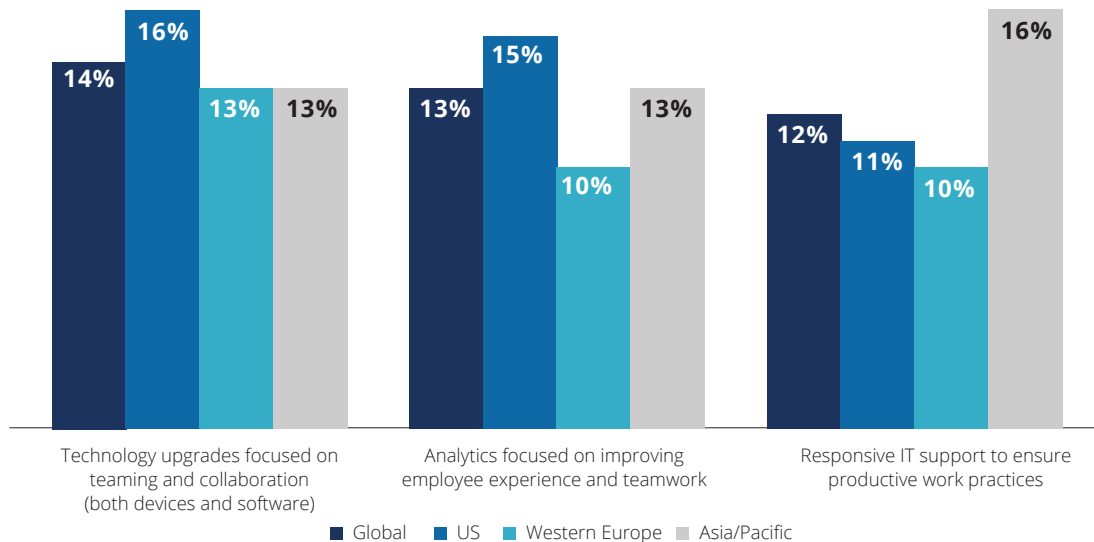
Although organizations are starting to pay attention to employee experience, current initiatives to improve it are still limited. Technology upgrades and the use of analytics to improve employee experience are still very low across regions and industries.



Globally:

- ▶ **Technology upgrades** focused on teaming and collaboration: **14%**
- ▶ **Analytics** focused on improving employee experience and teamwork: **13%**
- ▶ **Responsive IT support** to ensure productive work practices: **12%**

## Top initiatives to improve employee experience — regional view



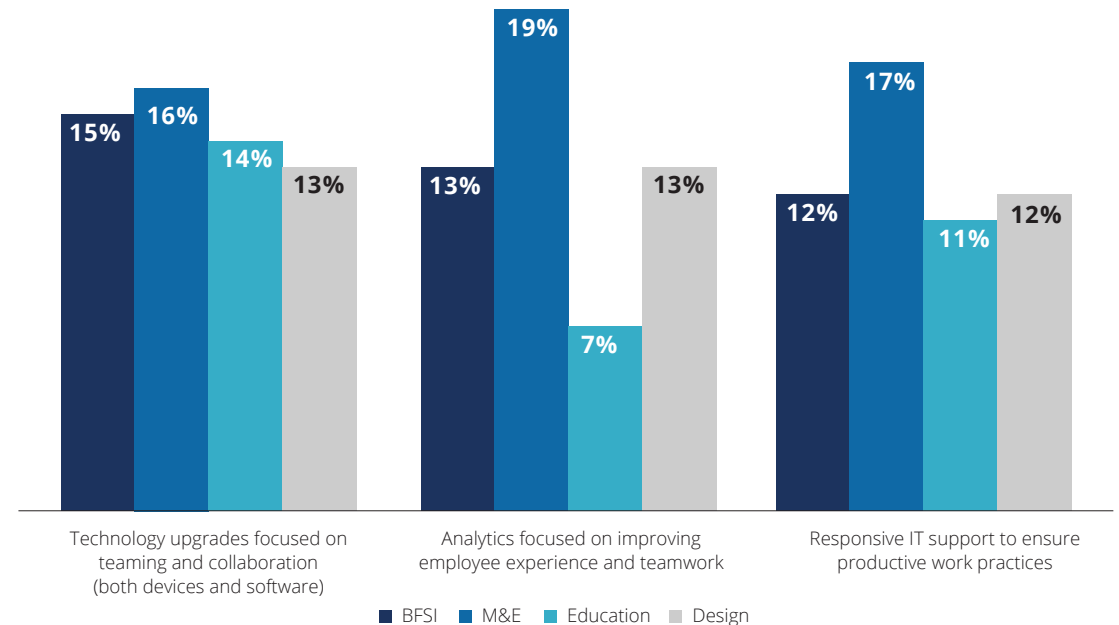
## Industry view

IDC's findings show the top initiatives currently implemented by industries are varied:



- ▶ **16%** of M&E and **15%** of BFSI organizations have technology upgrades focused on teaming and collaboration.
- ▶ **19%** of M&E organizations have analytics to improve employee experience and teamwork.

## Top initiatives to improve employee experience — industry view



# Lack of progress in tracking technology and experience parity hinders Hybrid First transformation

Progress tracking is important to check if efforts in technology and experience parity are in the right direction and bringing value. For many organizations, there is a limited usage of analytics to measure and track such progress.



**Nearly one-third** of organizations are still lagging in measuring success in technology and experience parity.



**35%** and **37%** are using metrics and key performance indicators (KPIs) to measure the progress of technology and experience parity, respectively, which are better ways to measure progress, but the quality of tracking also depends on how holistic the KPIs are.



**30%** and **27%** of organizations are using advanced analytics to track and measure the progress of technology and experience parity, respectively.

## How do organizations measure progress in technology and experience parity?

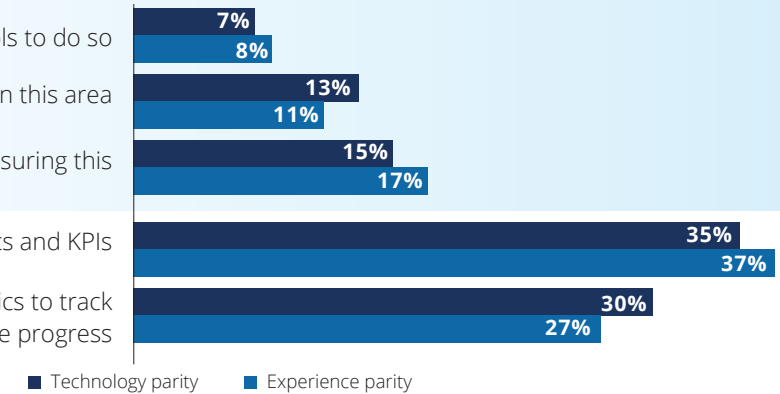
We don't measure/have no tools to do so

We are starting to measure progress in this area

We are manually measuring this

We use metrics and KPIs

We are leveraging analytics to track and measure progress



## Analytics can be used to measure technology and experience parity in hybrid models, for example:

- How employee demographic data and stages in life affect their preference for hybrid work
- Whether high performers are provided with similar high-quality devices for both home and office setups
- The number of days that employees with high hybrid work satisfaction prefer to work onsite
- Whether these employees are provided with devices that enhance their well-being (e.g., monitors with blue light reduction, color precision, and ergonomics)



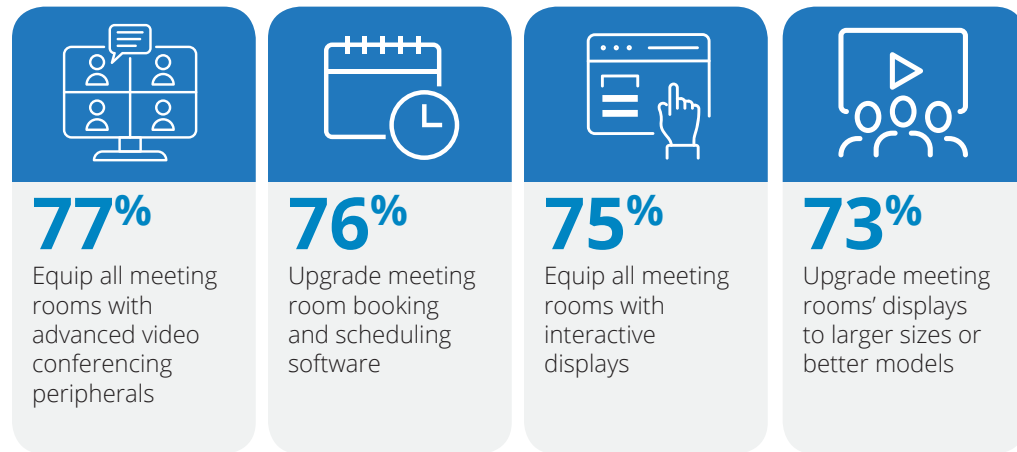
To adequately measure technology and experience parity, organizations must **employ more advanced analytics** such as sentiment analytics and algorithms to track progress. This forms a basis for success and clarifies what needs to be redefined or adjusted.

This also means the **data is holistic, consistent, continuous, and in real-time.**

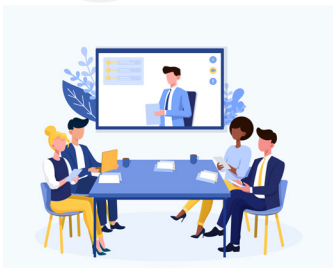
# To support hybrid work, about 70% of organizations intend to upgrade meeting rooms with advanced displays and peripherals

IDC research shows that more than 85% of Asia/Pacific organizations view workplace transformation as a priority or a high-priority investment area.<sup>4</sup> They are planning the workplace for more meetings, collaborating, sharing of ideas, and connecting with each other, rather than simply a place where people go to do focused work. In organizations' plans to redesign the workplace, many are focusing on upgrading their meeting rooms with both software and hardware updates to facilitate collaboration.

## Top investment areas for meeting room upgrades



 **Around 80%** of organizations in Asia/Pacific are eager to invest in equipping all their meeting rooms with better devices, followed by organizations in the US and Western Europe (~70%).



Having advanced devices in meeting rooms (such as larger and interactive displays, video conferencing peripherals) is critical to **ensure technology parity for employees both onsite and remote to communicate and collaborate effectively.**

## Plans to upgrade meeting rooms — regional view

Redesign approach	Global	US	Western Europe	Asia/Pacific
Equip all meeting rooms with advanced video conferencing peripherals (cameras, microphones, speaker systems)	<b>77%</b>	<b>75%</b>	<b>75%</b>	<b>81%</b>
Upgrade meeting room booking and scheduling software	<b>76%</b>	<b>75%</b>	<b>69%</b>	<b>81%</b>
Equip all meeting rooms with interactive displays	<b>75%</b>	<b>71%</b>	<b>71%</b>	<b>80%</b>
Upgrade meeting rooms' displays to larger sizes or better models	<b>73%</b>	<b>73%</b>	<b>68%</b>	<b>77%</b>
Upgrade meeting rooms with contactless, touchless, or voice control systems	<b>70%</b>	<b>65%</b>	<b>62%</b>	<b>80%</b>

# Technology and experience parity are even more important when organizations increase hot desks to accommodate hybrid work

## Regional view

**One-third** of organizations globally are planning to turn a proportion or all of their dedicated desks into hot desks. However, a previous study by IDC uncovered that 50% of employees face challenges with hot desk setups because of poor-quality or small monitors, the lack of space, and portability.<sup>5</sup> Organizations must upgrade their hot desk setups to ensure employee productivity and experience.



**17%** are planning to use coworking spaces for enterprises.



**16%** are planning to increase overall office space.

## Industry view



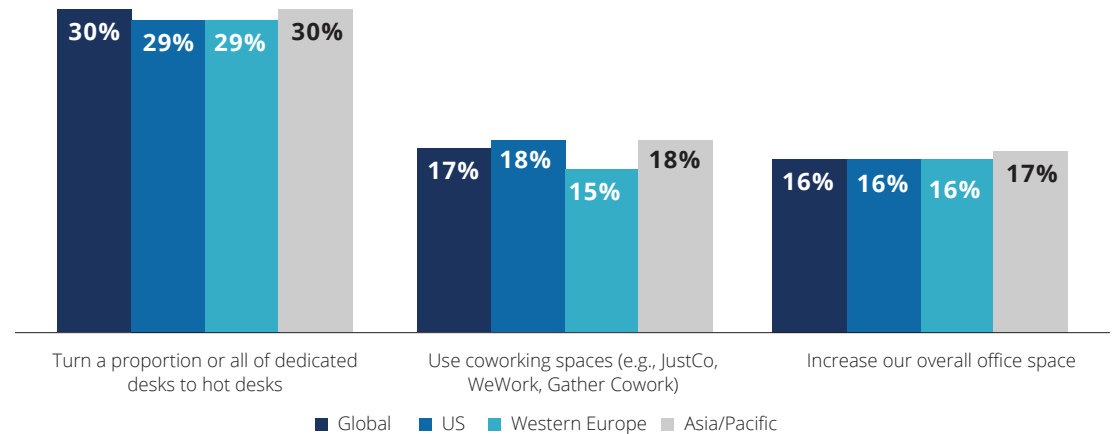
**75%** of M&E and **70%** of BFSI organizations are expecting more than 25% of their office to be hot desks.

The design and education sectors are less receptive to hot desks but still, **more than 60%** are planning to have more than 25% of their office to be hot desks.

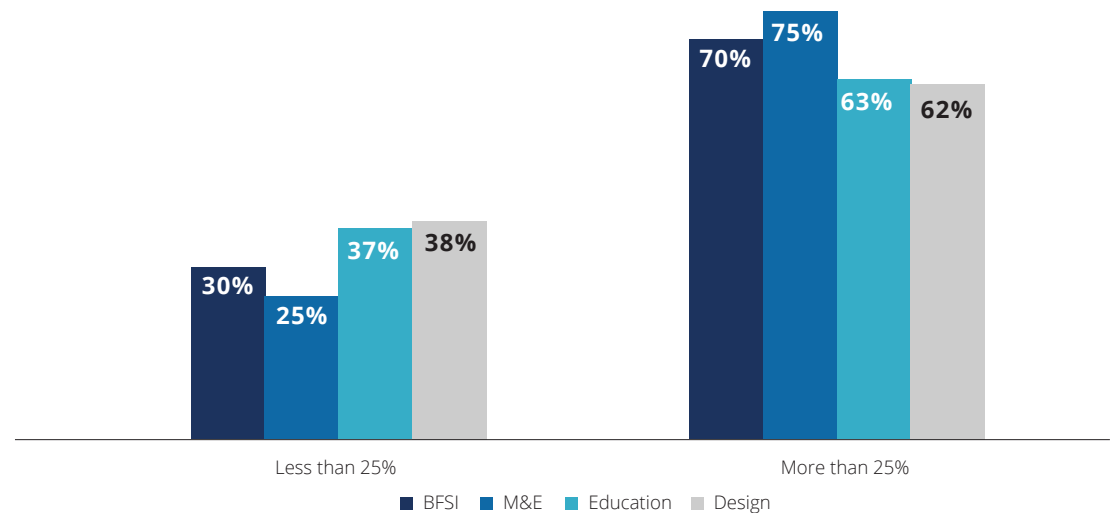


The redesign of offices for hybrid work models must go hand in hand with the right technologies and devices. **Ensuring technology parity is even more critical as this dimension is directly linked to experience parity.**

## Organizations' plans regarding workspace redesign — regional view



## Percentage of hot desks in the next 12-18 months — industry view





# Organizations are prioritizing new digital technologies to support hybrid work

As hybrid work will be the way forward for the majority of organizations globally, ITBDMs are planning to invest in these **top 3 workforce priorities** in the next 12–18 months:



**16%**

Strengthen or adopt new digital technologies and capabilities to support hybrid work



**15%**

Improve employee efficiency and productivity



**15%**

Improve digital skills and hybrid work skills for employees

These three priorities are interlinked as technology adoption and improving digital skills will lead to increased employee efficiency and productivity.

Specially, in each region:

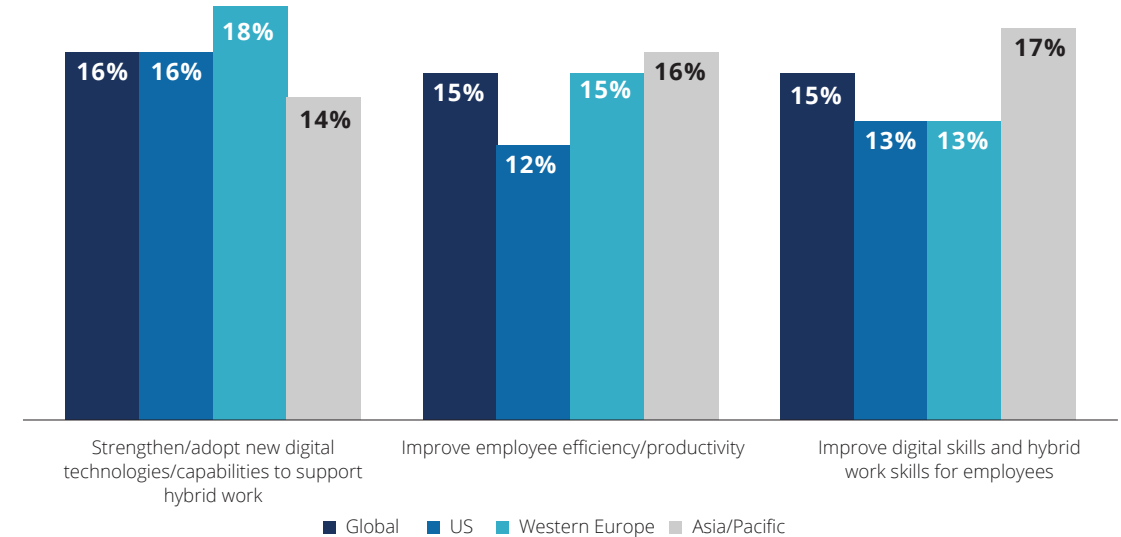


**18%** of Western Europe organizations and **16%** of US organizations plan to invest more in technologies for hybrid work.



**17%** of Asia/Pacific organizations plan to invest more in digital skills and hybrid work skills.

## Top priorities to support hybrid work — regional view

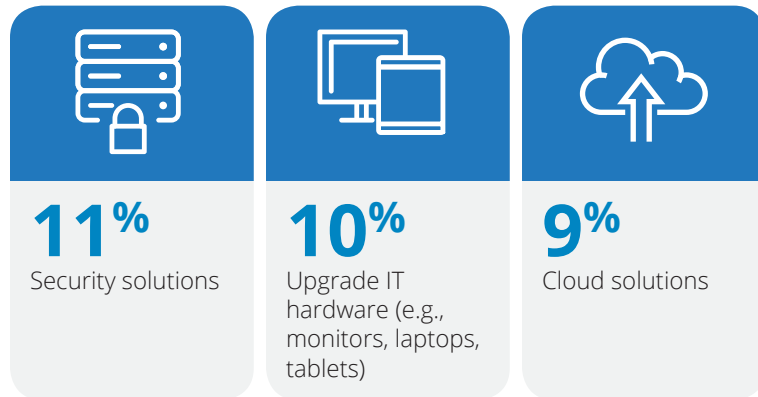


# Top investment priorities for organizations to enable technology parity

Despite an uncertain economic outlook for the year, 82% of ITBDMs anticipate that the 2022 investment plan for IT spending will be as originally planned or higher than originally planned.<sup>6</sup> In the next 12–18 months, organizations intend to invest in technologies to enable technology parity of the workforce. These technologies include security solutions, upgrading of IT hardware (such as monitors and laptops), and cloud solutions.

## Regional view

### Top IT investments globally

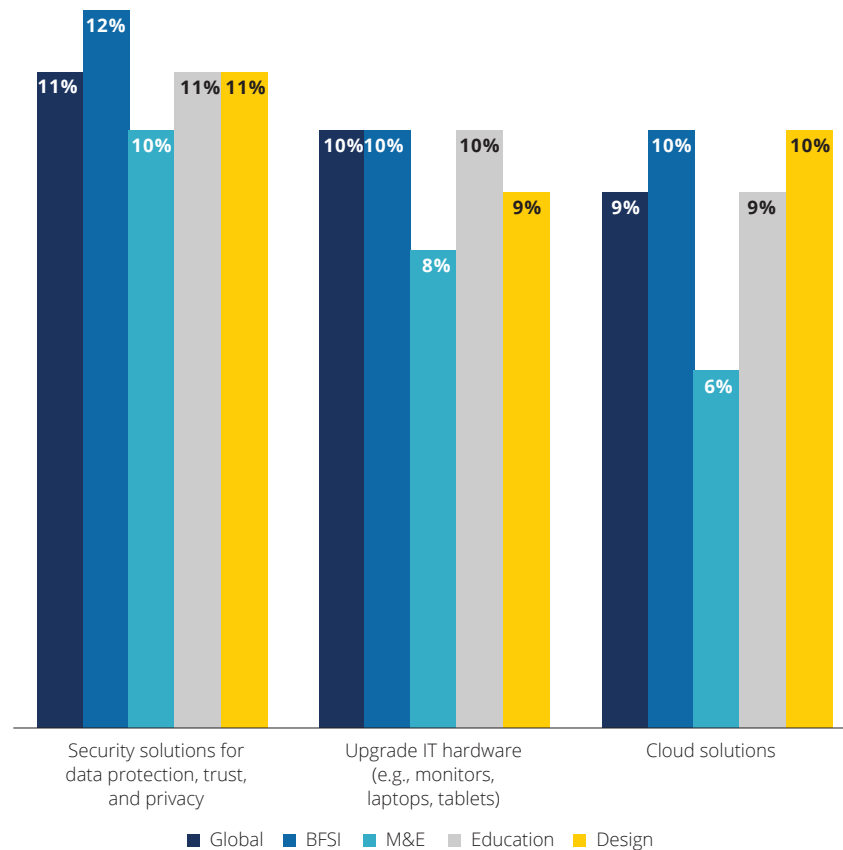


## Industry view

- **BFSI** has the biggest overall investments in these areas compared to other industries.
- **M&E** has lower overall investments compared to other industries and particularly for cloud solutions (**6%**).



## Major IT/technology investments in the next 12–18 months — industry view



# Monitors are important to hybrid work

As monitors are an important part of the hardware needed for hybrid work, organizations are planning to increase the provision of hybrid-enabling monitors for their employees.

Globally, the top monitor features that are important to organizations' purchasing decision in the next 12–18 months include **collaboration features (46%), screen size (46%), connectivity (46%), high resolution (45%), and energy efficiency (45%)**. Each industry has a preference based on the nature of their jobs.

Based on a previous IDC study, 29% of employees said monitors with a built-in camera and microphone will be convenient for them and can enhance collaboration, while 24% said such monitors can make virtual meetings seamless.<sup>7</sup>



## Top monitor features by industry (next 12–18 months)



### BFSI

High resolution (53%), collaboration (52%), and connectivity (52%)



### M&E

Screen size (56%), color precision (47%), and high resolution (46%)



### Education

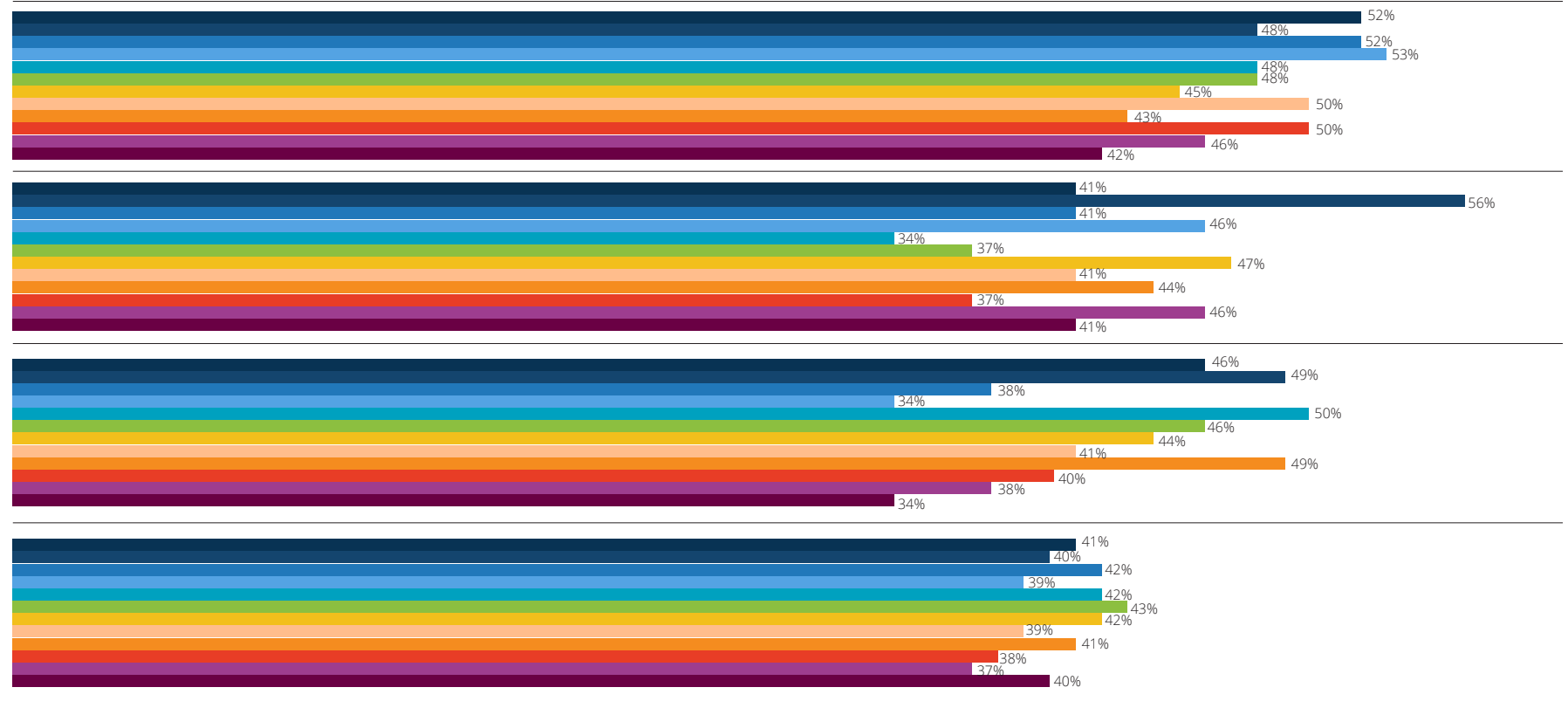
Energy efficiency (50%), screen size (49%), and RJ45 port (49%)



### Design

Vendor warranty/after sales support (43%), connectivity, and energy efficiency (42%)

## Most important monitor features in organizations' purchasing decision in the next 12–18 months — industry view



- Collaboration features (built-in camera, microphone, and speaker)
- Screen size
- High resolution (QHD and above)
- Energy efficiency
- Color precision (wider color gamut with DCI-P3)
- Ergonomics (eye-comfort, height adjustable stand)
- Number of ports (DP, HDMI, USB downstream ports)
- Portability
- Connectivity (USB-C with power delivery)
- Vendor warranty/after sales support
- RJ45 interface with enterprise features and remote manageability
- Panel type (IPS/VA)

# Essential guidance

## Get ready for the Hybrid First work model by ensuring technology and experience parity



1

### Ramp up efforts in technology and experience parity for Hybrid First transformation

Organizations are planning to increase their hybrid workforce and hybrid work models, but most are not ready for the Hybrid First stage. ITBDMs must focus on two key areas — technology parity and experience parity — to advance their transformation.

2

### Consider technology upgrades to support hybrid work

Organizations need to strengthen or adopt new technologies for hybrid work and improve employee productivity and experience. For ITBDMs, focusing on technology upgrades, especially on devices such as monitors and peripherals, will drive employee productivity, bring more comfort, increase well-being, and create a better work experience for employees.

3

### Redesign offices with technology and experience parity in mind

As hybrid work will be the way forward, the redesign of the office space to accommodate hybrid work with more hot desks, and increased investments in meeting rooms must go in tandem with technology and experience parity. Better devices, displays, and monitors can facilitate and improve collaboration and communication among the workforce.

4

### Use analytics to measure technology and experience parity

To avoid wasted efforts and investments, organizations must employ analytics to track, measure, and evaluate progress in technology and experience parity.

#### Sources:

1 IDC Future of Work IT and Business Decision Maker Survey 2022, Sponsored by Dell, n = 700

2 IDC InfoBrief, Sponsored by Dell, The Future of Learning — Monitors Have an Impacting Role in the Hybrid Era, Doc #AP241279IB, April 2022

3 IDC InfoBrief, Sponsored by Dell, Driving Employee Experience and Productivity across Industries — Monitors Are an Imperative in the Hybrid Era, Doc #AP241307IB, February 2022

4 Future of Work Global Survey, IDC, April 2022, n = 1,316

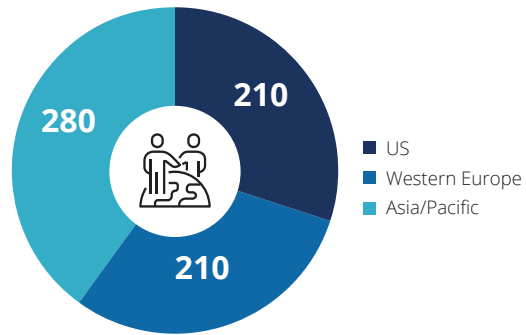
5 IDC Future of Work Employee Survey 2021, Sponsored by Dell, Enterprise n = 150

6 IDC's Future Enterprise Resiliency & Spending 2022 Survey Wave 4, n = 825

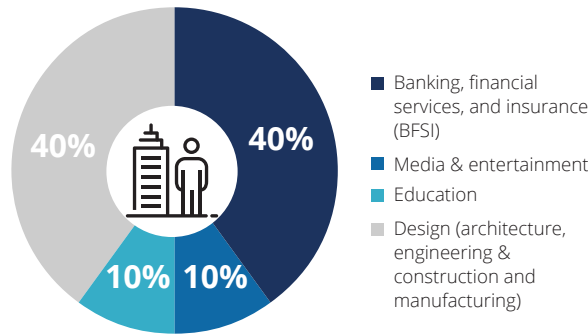
# Appendix: Methodology and demographics

IDC surveyed 700 IT and business decision makers across the US, Western Europe, and Asia/Pacific.

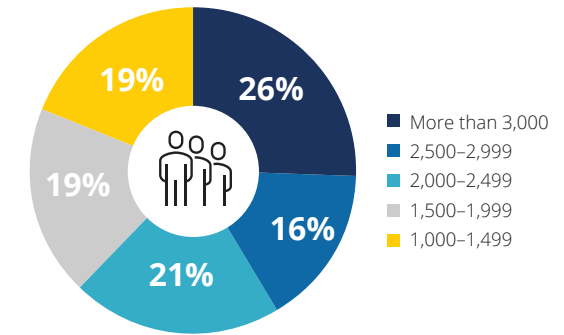
## Regions



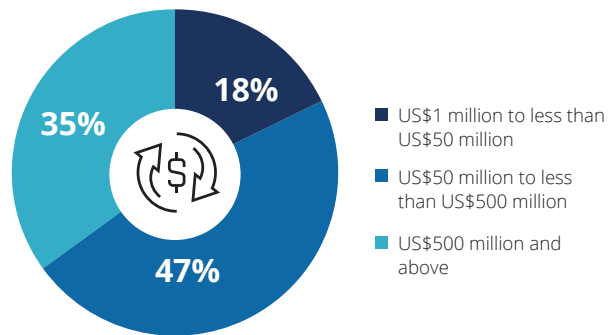
## Industries



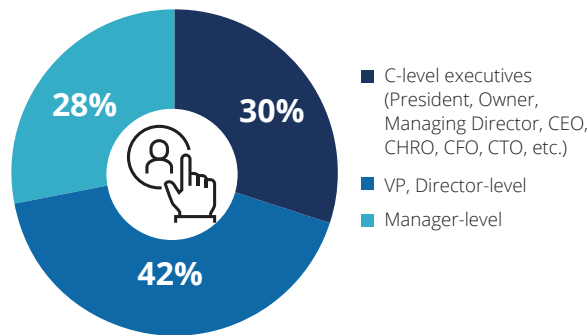
## Full-time employees



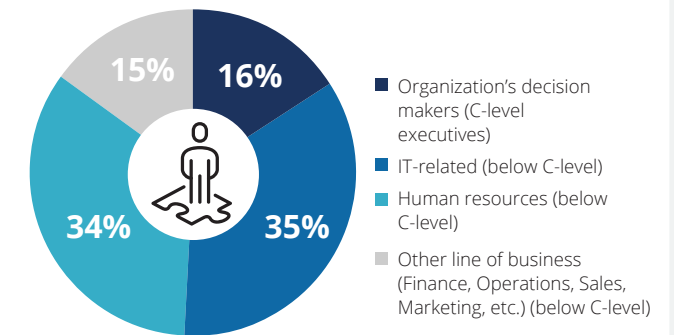
## Global revenue in 2021



## Respondents' current title

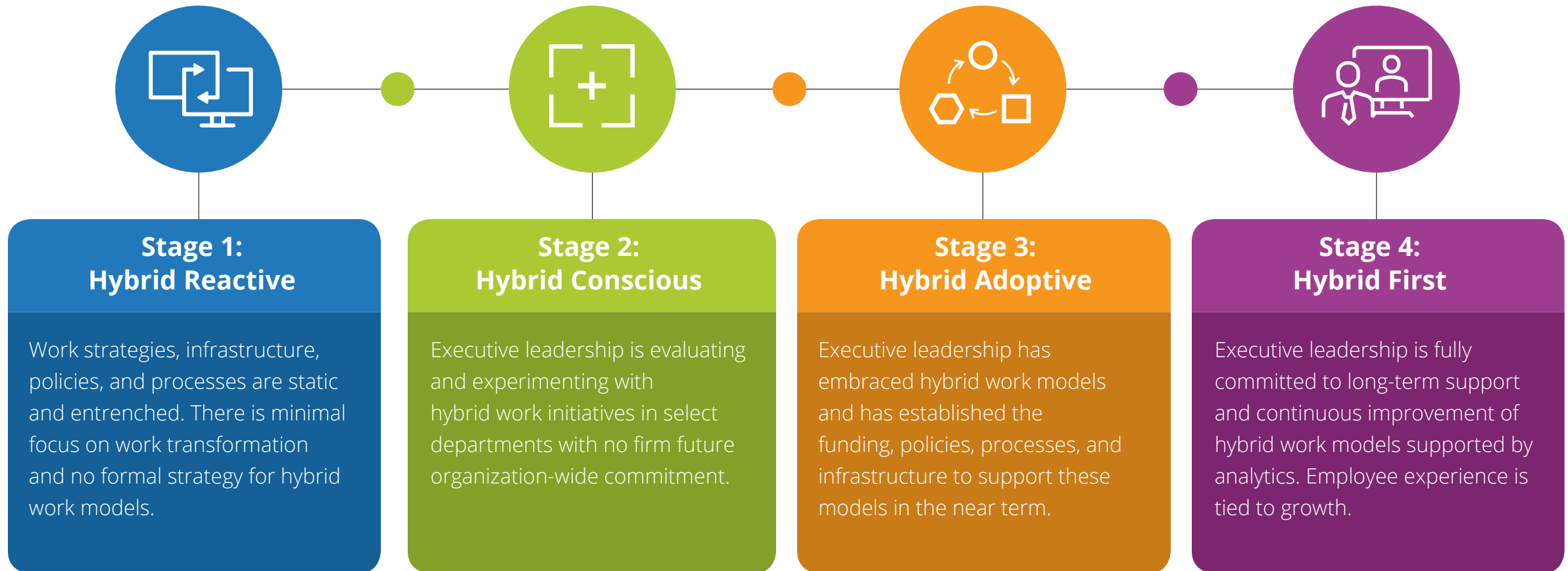


## Respondents' current role



# Appendix: Four stages of hybrid work maturity

IDC defines hybrid work as a dynamic work model in which workers conduct business at diverse locations: on-premises, in the field, or at a remote location (including a home office). IDC's hybrid work maturity framework describes the organizational characteristics at four levels of hybrid work maturity, from a completely ad-hoc approach with limited thought and planning related to hybrid work models to one in which a hybrid work strategy is woven into the organization's culture at every level.



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Source: <sup>1</sup>IDC Worldwide Quarterly PC Monitor Tracker 2022Q2



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