

Mixed Device Environments Create Complexity and Risk

New Research Shows Organizations Should Carefully Examine the Pros and Cons of Supporting Both PCs and Macs in Their Knowledge-worker Environments

MARCH 2024

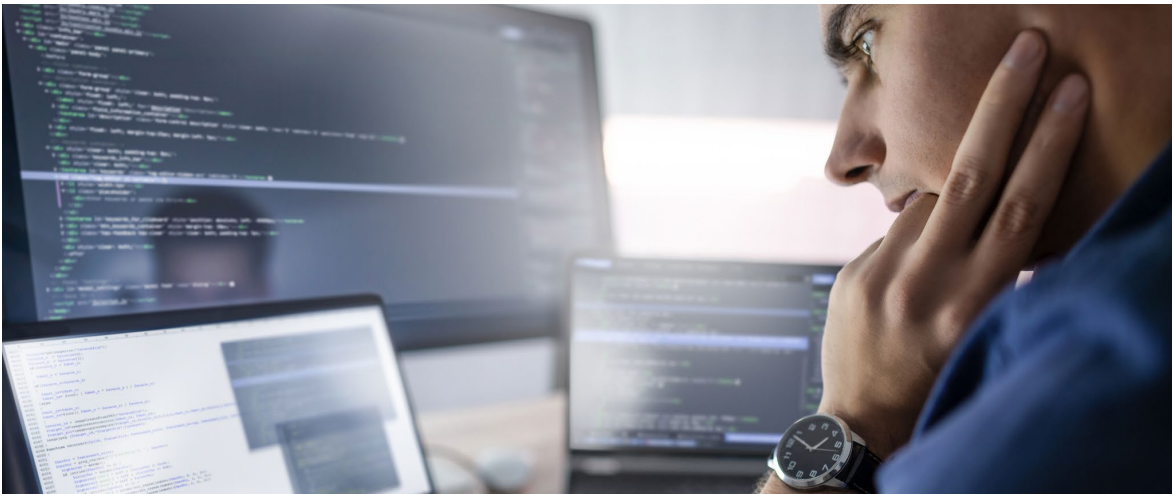
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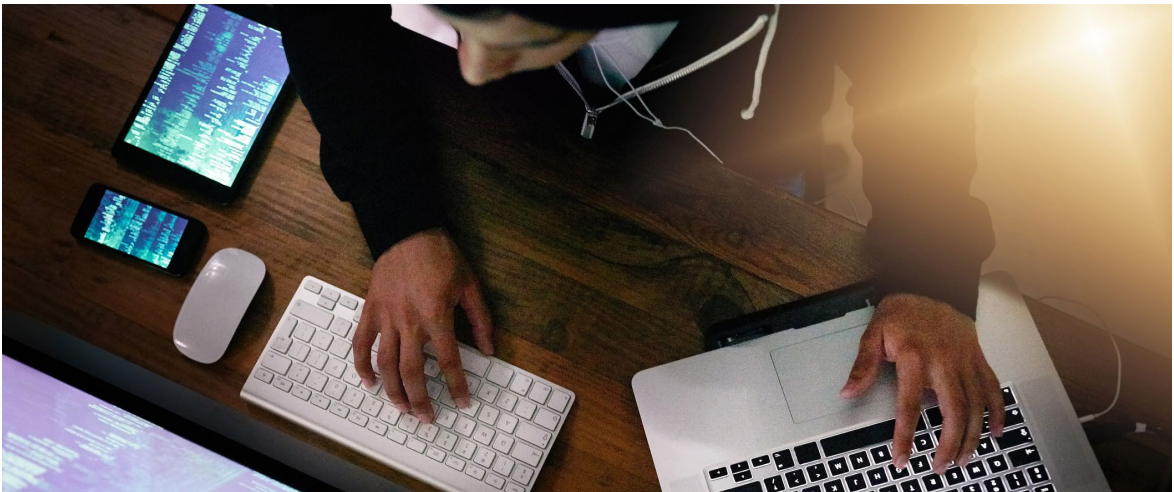
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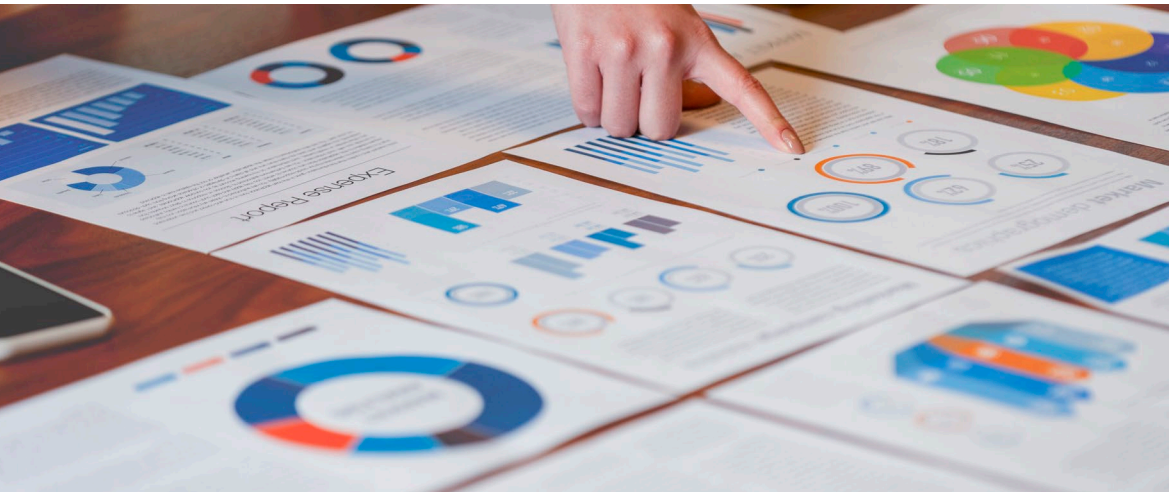
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Research Objectives and Highlighted Findings

This eBook explores a dynamic present in many corporate environments: that employees use, and IT must support, a mix of Windows PCs and Mac devices. For the purposes of this eBook, this multi-platform dynamic is termed a *mixed device environment*.

The goal of this eBook is to explore the benefits and challenges associated with supporting a mixed device environment, to assess how organizations plan to evolve their approaches over time, and to compare and contrast both IT and user experiences associated with PC and Mac platforms. To gain these insights TechTarget's Enterprise Strategy Group conducted a comprehensive survey of IT professionals tasked with supporting mixed device environments and corporate knowledge workers, including both Mac and PC users.

The goal of this eBook is also to provide readers with peer-based insights about how to manage mixed device environments. Upon reading this eBook, you will:

- Gain insight into how organizations today view the importance of digital work experience optimization.
- Understand what causes organizations to need to support a mixed device environment.
- See how IT decision-makers view the differences between PCs and Macs in areas like manageability and end-user experience (EUX).
- Better understand how EUX differs between PC and Mac devices as reported by end users themselves (as opposed to IT's belief or speculation).

Highlighted Findings

Digital experience optimization is mission-critical:

- 86% of respondents said digital work experience optimization is among their top three most important technology priorities for the next 12 months.

Supporting a mix of device platforms (PCs and Macs) frequently drives up cost and complexity:

- Many respondents said support costs (41%), licensing costs (40%), and complexity tied to the additional management tools required to support the environment (39%) are all driven up by the need to support a mixed device environment.

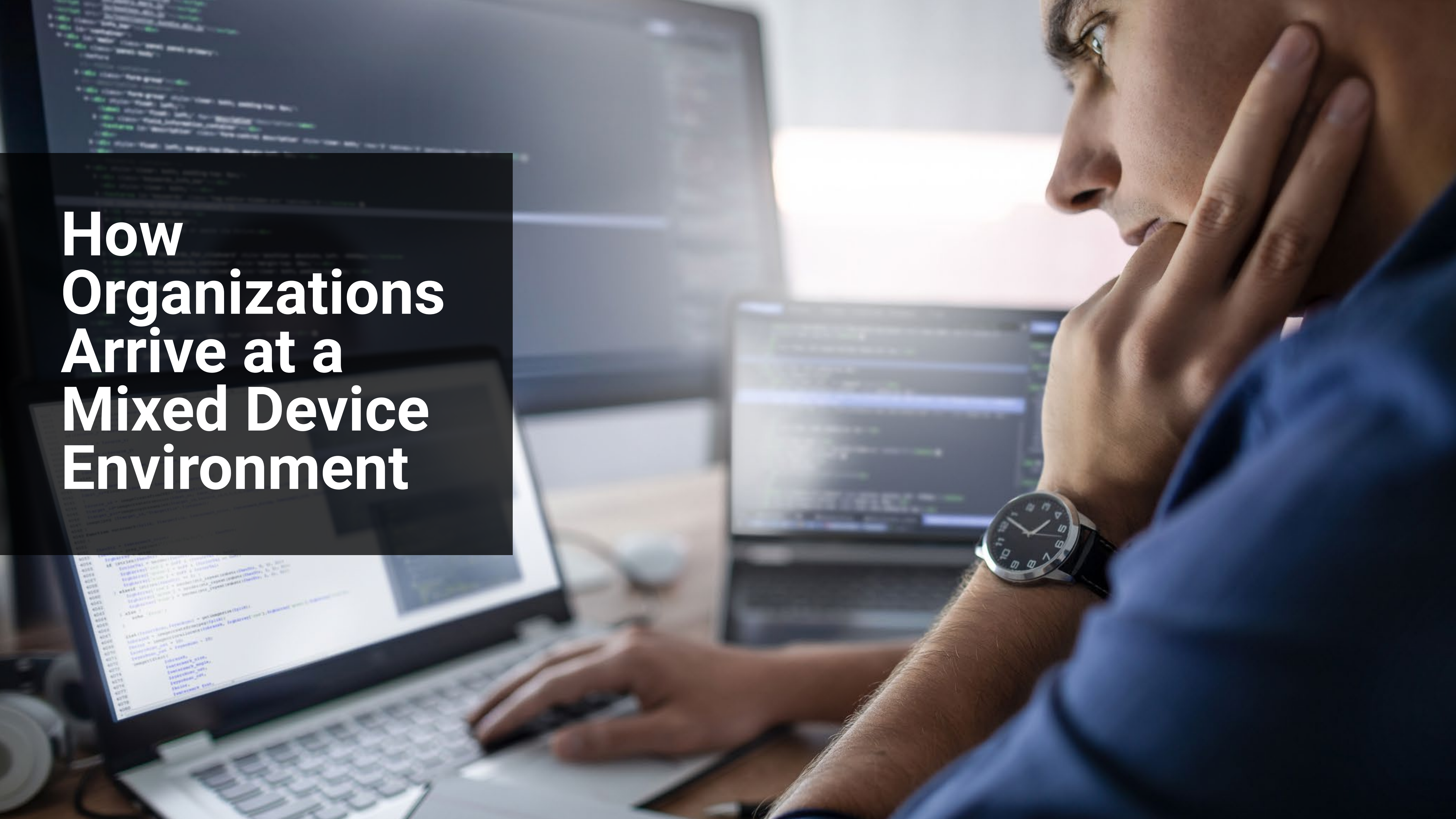
Microsoft's modernization moves the needle:

- 95% of respondents said the rate of improvement and innovation seen in Microsoft's device management tools is strong.

IT gives the PC platform a strong manageability edge and the edge in key areas of EUX:

- 57% gave PCs the edge in remote manageability (vs. 19% giving the edge to Macs).
- 57% gave PCs the edge in available third-party monitoring and security solutions (vs. 19% giving the edge to Macs).
- 56% gave PCs the edge in support (vs. 21% giving the edge to Macs).
- 57% gave PCs the edge in terms of collaboration tools (vs. 16% giving the edge to Macs).
- 59% gave PCs the edge in terms of app compatibility (vs. 19% of respondents giving the edge to Macs).

How Organizations Arrive at a Mixed Device Environment



Improving Users' Digital Work Experience Is Seen as Critical to Improving IT Efficiency and Increasing User Productivity

Before delving into an exploration of how organizations arrive at a mixed device end state, and how supporting that environment is going, it is important to understand the stakes of getting these decisions right.

The research clearly shows the stakes are high. We asked respondents to rank the importance they are placing on enhancing employees' digital work experiences—meaning the sum of the devices, collaboration tools, applications, and hybrid or remote work experiences they are provided with—over the next 12 months. Nearly 9 out of 10 respondents (86%) reported this was among their three biggest technology priorities for the coming year.

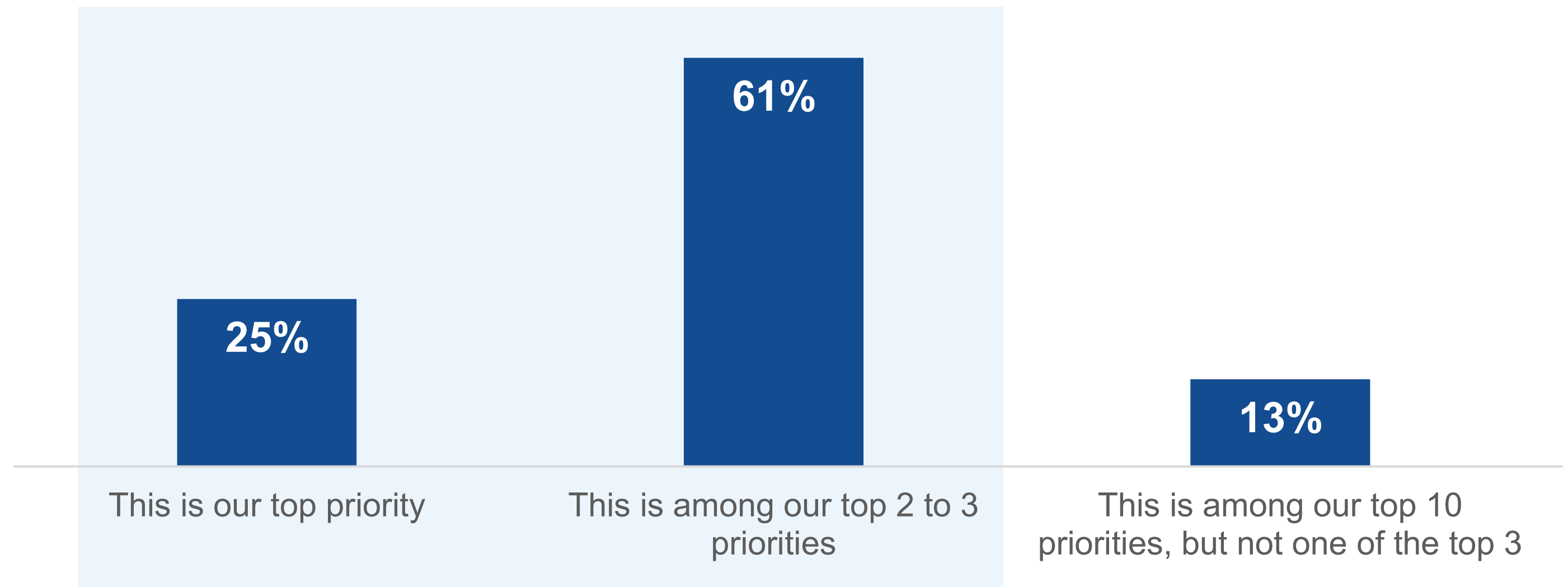
When asked why, it was clear that respondents see enhanced digital work experiences as a way to drive multifaceted benefits:

- **Two-thirds (67%) of respondents said increasing IT efficiency is driving the prioritization.** Reductions in downtime and simplified issue resolution resulting from enhanced digital work experiences should lighten the load on IT support teams. This, in turn, would enable the IT organization to focus on more strategic initiatives, innovation, and proactive maintenance, fostering more agility and efficiency.
- **A near identical percentage of respondents (66%) said increasing end-user productivity is driving the prioritization.** This is also a rational expectation. As employees are provided access to updated devices, simplified processes, and enhanced collaboration platforms, they are empowered to work more efficiently, collaborate seamlessly, and achieve their objectives with greater ease.

Ultimately, an improved digital work experience creates a symbiotic relationship where both the IT organization and end users thrive and are satisfied. In fact, 54% of respondents reported that improved employee satisfaction is an outcome targeted by enhancing digital work experiences. At the end of the day, accomplishing this goal should result in a more agile, productive, and innovative workplace.

The Criticality of Improving Digital Work Experiences

Nearly 9 out of 10 respondents reported this was among their three biggest technology priorities for the coming year.



How Organizations Find Themselves Supporting a Mix of Device Platforms

A key part of the research is to understand the interplay between an organization's ability to deliver an optimized digital work experience to its employees and the mix of device platforms present in the environment. As such, TechTarget's Enterprise Strategy Group (ESG) only surveyed respondents whose organizations have fleets of both PCs and Macs.

Among organizations represented, three degrees of device mix were examined:

- 1.Low: the 29% of respondents that reported 10% or fewer of their end users leverage a Mac as their primary work computer.
- 2.Moderate: the 27% that reported 11%-20% of end users leverage a Mac as their primary work computer.
- 3.High: the 43% that reported more than 20% of end users leverage a Mac as their primary work computer.

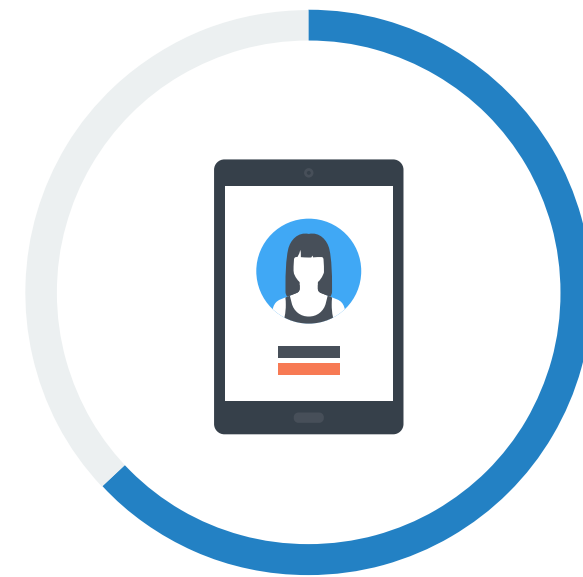
This data will be revisited, as, in several cases, ESG observed organizations' experiences managing a mixed device environment varied across these three groups of respondents.

As for how organizations find themselves supporting a mix of devices, we found that this requirement is mostly driven by functional team decisions (74%) and by a decision to support individual user preferences (63%). Additionally, 39% of respondents reported M&A activity had played a role in increasing the mix of devices at their organization.

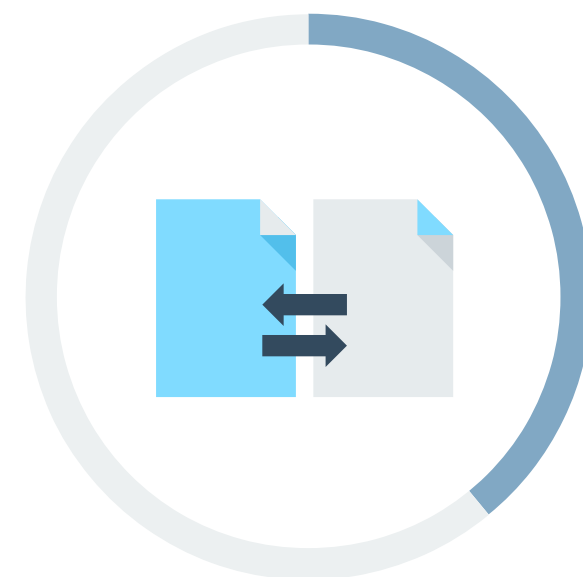
Reasons Organizations Support and Manage a Mixed Device Environment



Functional teams use Macs by default/as a decision we made as an organization,
74%



Some users prefer Macs,
63%



Mergers and acquisitions,
39%

Supporting a Mixed Device Environment Introduces Challenges

The research sought to uncover if, and to what degree, mixed device environments create issues for organizations. To the former point, **96% of respondents stated one or more challenges were directly caused by their organizations' need to support and manage a mixed device environment.**

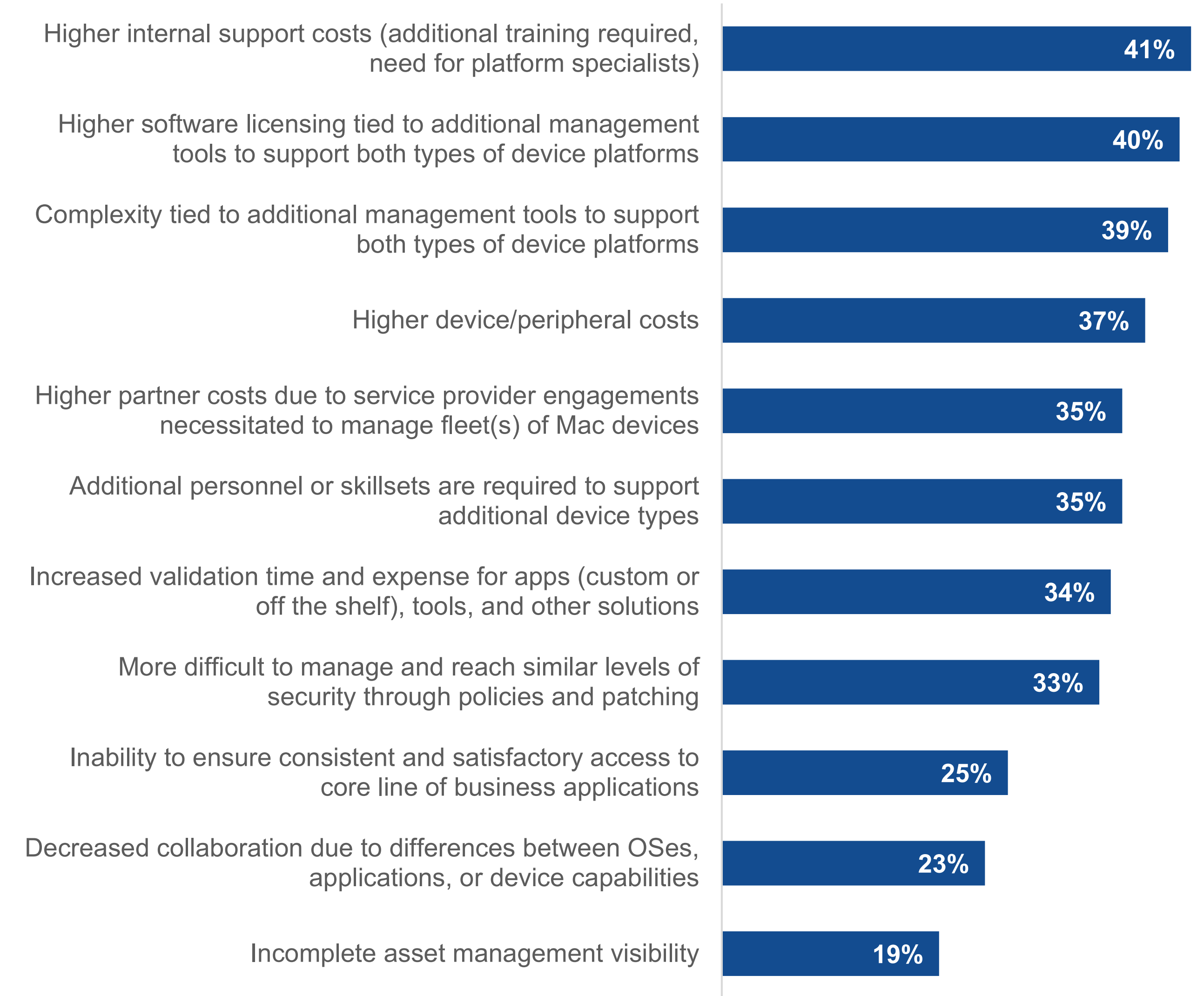
On average, respondents identified approximately four separate challenges caused by this dynamic. Most often, respondents cited higher internal support costs, such as increased training needs or needing to hire platform specialists (41%), higher licensing costs tied to specialized management tools (40%), increased complexity (39%), and higher device and peripheral costs (37%).

The survey went on to ask respondents to describe how acute these challenges were: very challenging, moderately challenging, or not very challenging. In all cases, it was very rare that respondents felt these challenges were trivial:

- 85% of respondents reported that the collaboration issues caused by mixed device environments were very or moderately acute. This could be caused by file-sharing issues, where differing file formats might need conversion, leading to errors or loss of data integrity. Or collaboration tools might work optimally on one platform but have limited functionality or performance issues on the other, hindering collaboration between teams.
- 85% of respondents reported the challenges associated with reaching the same level of security across device PCs and Macs as very or moderately acute.
- 86% reported that the increases seen in internal support costs were material.

In fact, in each area, a minimum of 77% of respondents reported that the challenges they experience as a result of their mixed device environment were meaningful.

The Issues Created by Mixed Device Environments



Mac Device Counts Have Plateaued

The data makes it clear that supporting and managing a mixed device environment brings with it challenges. In fact, a 65% majority of IT respondents explicitly said supporting a single device platform (i.e., only PCs or only Macs) would make their jobs appreciably easier. However, 71% also believed that incurring these challenges and supporting a mix of devices delivers a positive impact to end users.

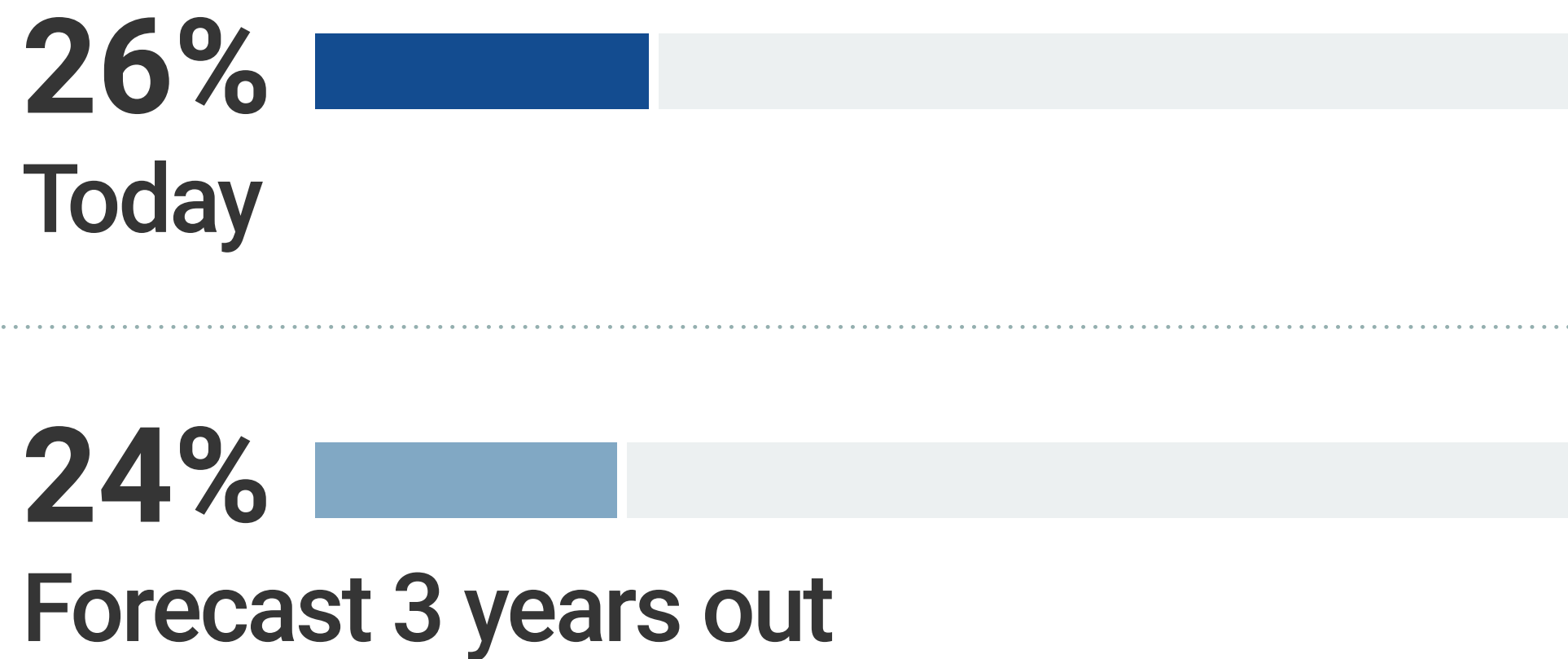
This push and pull begs the question: Are Macs poised to further penetrate user environments or become rarer, or will usage remain flat?

The survey asked respondents not only their current mix of PCs and Macs, but also to forecast what percentage of users will be using a Mac as their primary work computer three years from now. While organizations supporting a mixed device environment today reported that an average of 26% of users rely on a Mac today, looking ahead, respondents estimated that percentage to decline slightly to 24%.

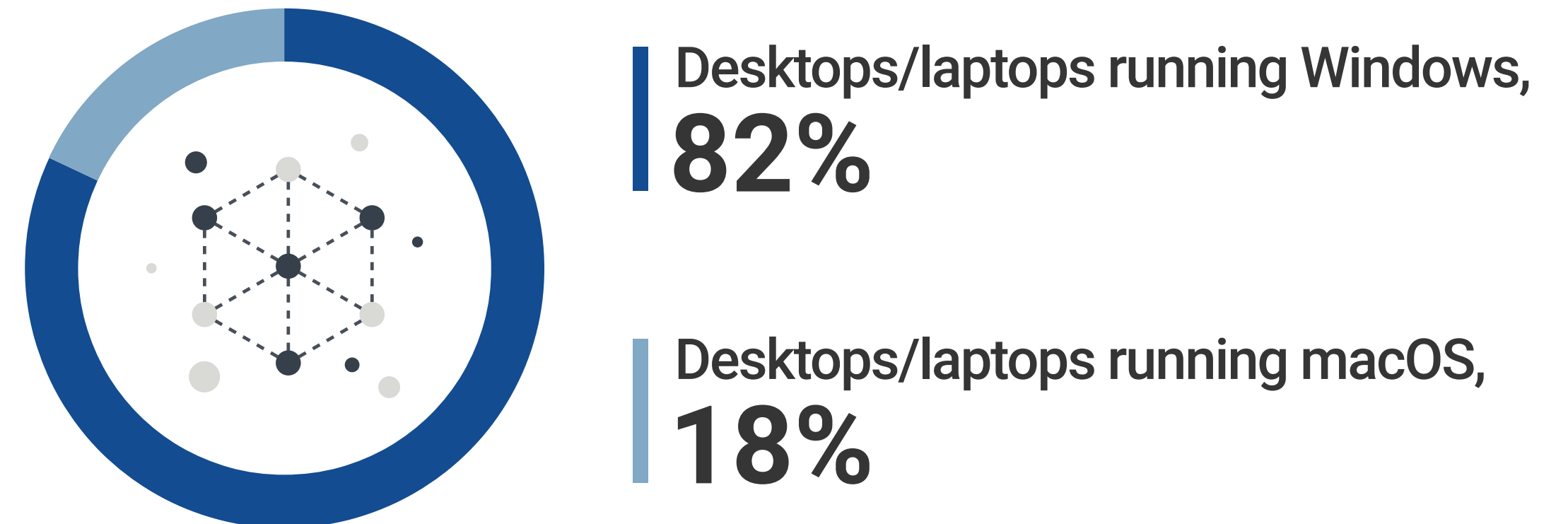
The implication is that most organizations supporting a mix of devices today have reached a point of diminishing returns, where the challenges introduced by further leveraging of Macs might outweigh the benefits. On the other hand, organizations do not expect the use of Macs to go away but rather remain largely flat over a three-year time horizon.

That said, if organizations did make the decision to unify their device approach, they would overwhelmingly select PCs by more than a 4:1 margin (82% vs. 18%).

The Percentage of End Users Using Macs: Today vs. Three Years Out



Which Device Platform Would Be Selected if the Organization Decided to Unify its Environment?



A Detailed Analysis of How IT Decision-makers View Windows and Mac platforms



Modern Windows Device Management Tools Are Moving the Needle

The legacy approach to managing Windows devices was to rely on manual configuration, scripting, and the use of tools like System Center Configuration Manager (SCCM). Administrators often wrote scripts to automate tasks, manage software deployments, and enforce policies. SCCM provided centralized management but required on-premises infrastructure, demanding IT resources for maintenance and scalability. Managing SCCM involved complexity, expertise, and maintenance efforts, especially in larger environments.

In recent years, modern management with platforms like Microsoft Intune, VMware Workspace ONE, Intel vPro®, and others have offered the potential to improve Windows device management. These solutions offer cloud-based management, simplifying deployment and administration through a centralized, web-based console. This approach eliminates the need for on-premises infrastructure management and enables over-the-air management, allowing administrators to configure policies, deploy applications, and ensure security compliance remotely.

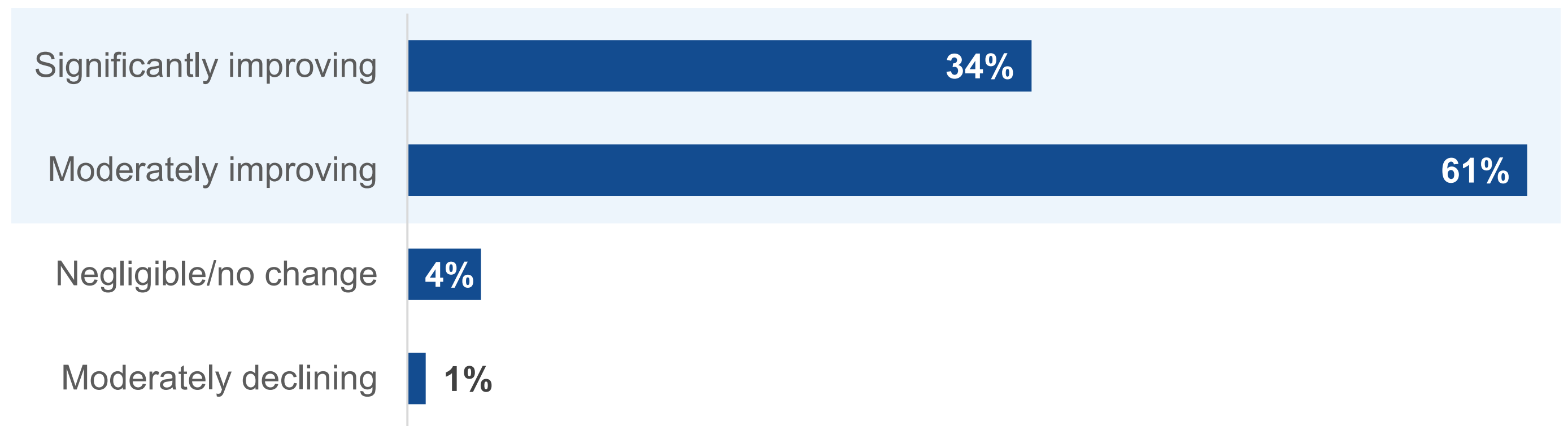
“91% reported that the adoption of these platforms had a significant or moderately positive impact on their ability to support and manage their mixed device environment.”

Respondents almost universally reported that these modern tools are delivering on their promise and offering moderate or significant rates of improvement and innovation (cited by 95%).

Additionally, 91% reported that the adoption of these platforms had a significant or moderately positive impact on their ability to support and manage their mixed device environment.

In terms of specific features organizations are prioritizing, 91% said it is important to use a platform that allows the organization to manage device drivers in a single place, 87% are looking for management tools that enable them to rationalize the number of agents installed on devices, and 85% are looking to enable self-service application service requests and installations from a user-accessed service catalog.

The Rate of Improvement and Innovation Seen in Modern Windows Management Solutions



How Much Does an Organization’s Pivot to Modern Windows Management Impact IT’s Satisfaction?

While nearly all respondents agree that the rate of improvement and innovation seen in modern Windows management tools is noteworthy, the research went deeper.

Respondents were asked to define how much progress their organization has made shifting to modern Windows management solutions: moderate progress, extensive progress, or a state of being fully transitioned.

Later, respondents were asked to rate their IT teams’ satisfaction with the tools in place to support users on a scale of 0 (not at all satisfied) to 10 (very satisfied).

Using a net promoter score (NPS) methodology that assesses by what degree promoters (i.e., those rating their satisfaction as a 9 or 10) outnumber detractors (i.e., those rating their satisfaction as a 6 or lower), it quickly became apparent that the transition to modern Windows management tools significantly increases the IT team’s satisfaction:

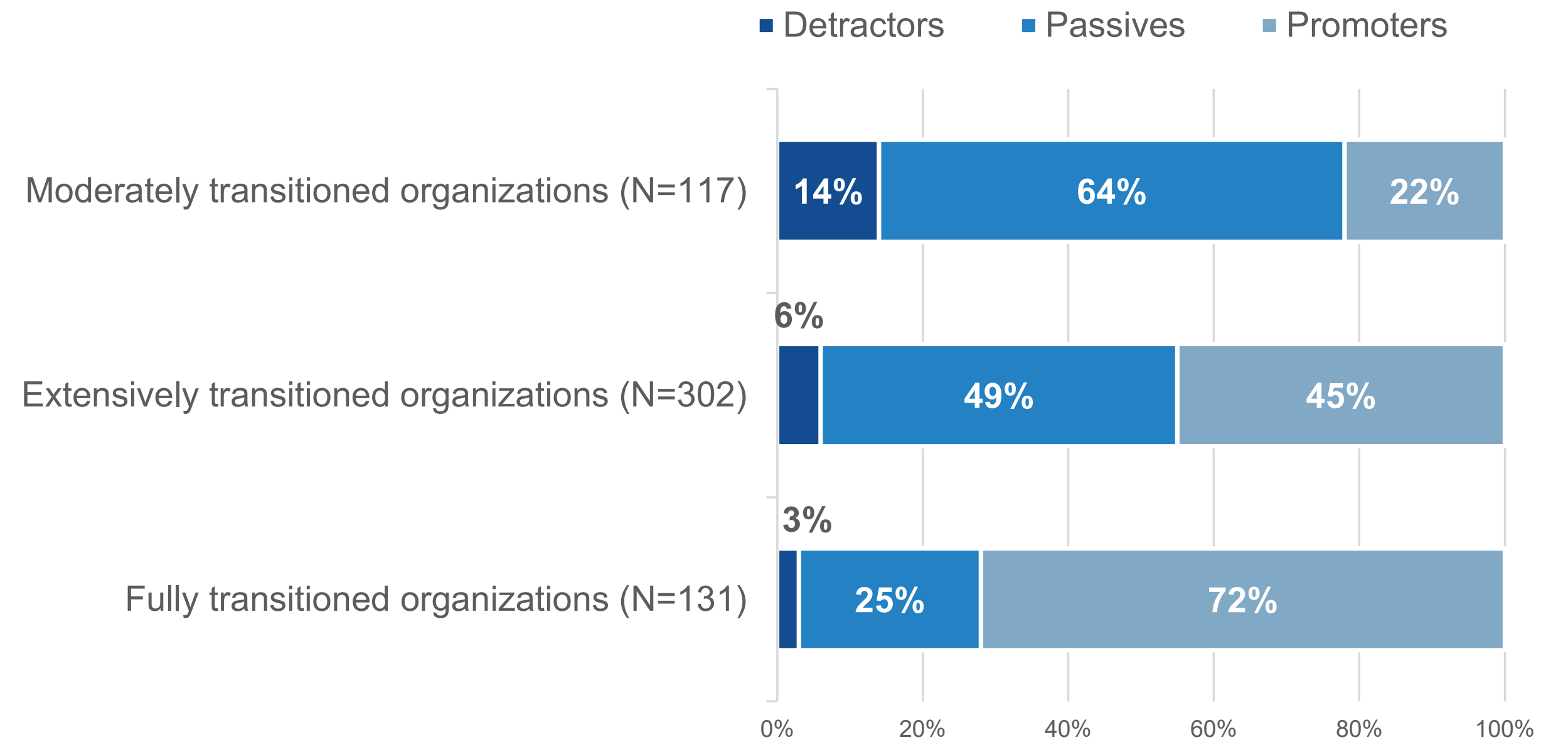
- Among respondents reporting only a moderate shift to modern management, just 22% said their IT teams are promoters vs. 14% being detractors, resulting in an NPS of +8.
- Among respondents reporting an extensive shift to modern management, 45% reported their IT teams are promoters vs. 6% being detractors, resulting in an NPS of +39.
- Among respondents reporting they had fully transitioned to modern management, 72% said their IT teams are promoters vs. 3% being detractors, resulting in an NPS of +69.

Said another way, the shift to modern Windows management tools is correlated with a greater than 8x increase in IT team satisfaction.

Enterprise Strategy Group believes the shift to modern management tools improves experience and satisfaction by consolidating the number of agents so there’s less to manage for IT, while end users reap a commensurate improvement in battery life and system responsiveness. Similarly, these solutions may support an overall shift toward more cloud-based solutions and strategies. For example, Intel Device Discovery introduces a novel approach for cloud service providers and tools to engage with Intel vPro platforms, facilitating the collection of data crucial for informed device management decisions.

Taken together, it is easy to see why the shift to modern management would be accompanied by such an increase in satisfaction.

The Correlation Between IT Satisfaction and the Use of Modern Windows Management Tools



How IT Feels Device Management and EUX Differ Across PCs and Macs

IT respondents participating in this survey were asked to compare device management and end-user experiences offered by both PCs and Macs. In both regards, respondents were more apt to give the edge to PCs than they were to give the edge to Macs.

From a device management experience, respondents were:

- 3x as likely to say PCs have the advantage in terms of the third-party security, management, and monitoring software available for the platform (57% vs. 19% giving the edge to Macs).
- 3x as likely to say PCs have the advantage in terms of remote management capabilities (57% vs. 19% giving the edge to Macs).
- 2.7x as likely to say PCs provide better enterprise support (56% vs. 21% giving the edge to Macs).

And more, as shown in the figure at left.

This trend in the data continued as IT respondents were asked to assess a multitude of platform capabilities related to end-user experience.

Respondents were:

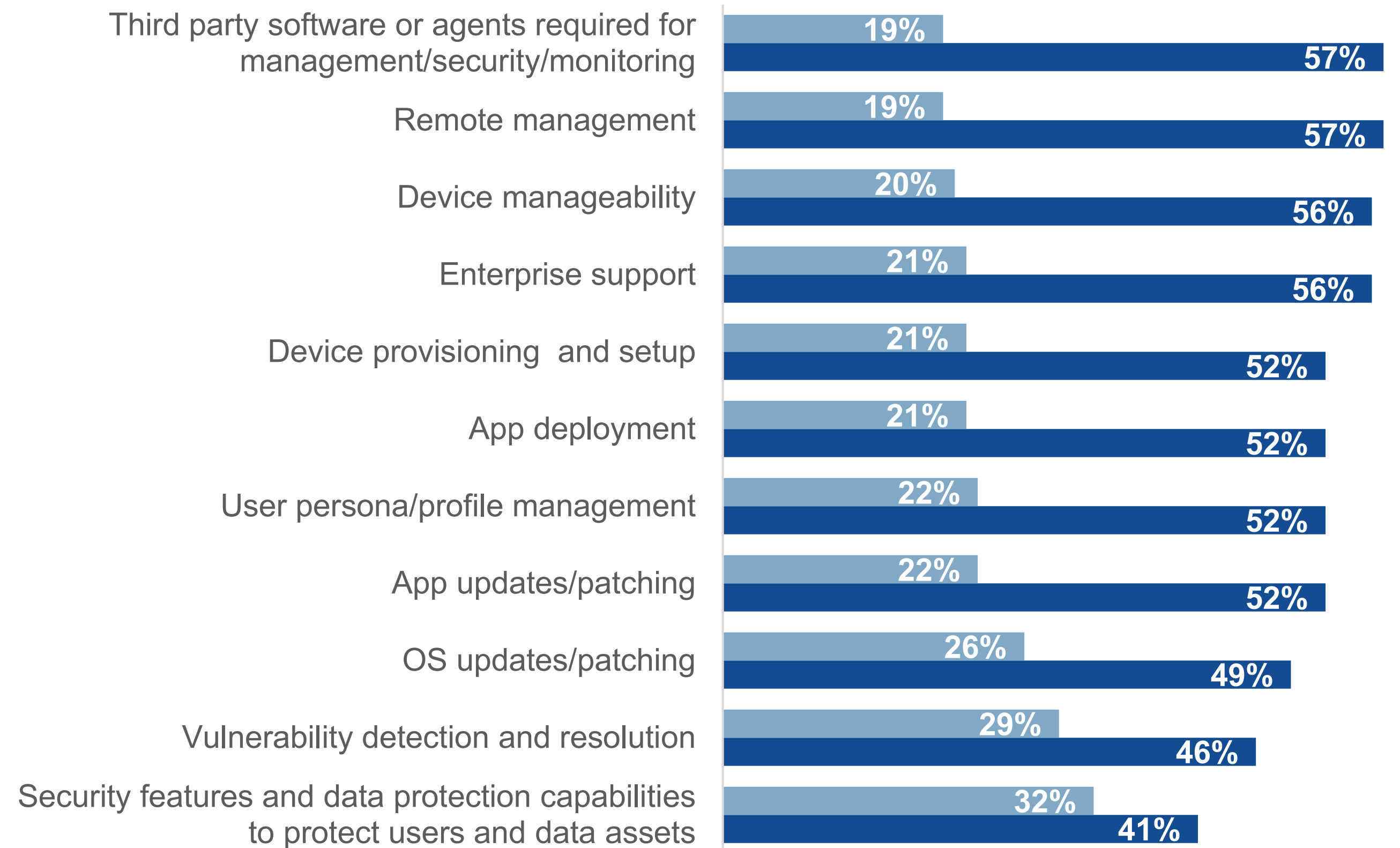
- 3.6x more likely to say PCs have the advantage in terms of collaboration tools (57% vs. 16% giving the edge to Macs).
- 3.1x more likely to say PCs have the advantage in terms of app compatibility (59% vs. 19% giving the edge to Macs).
- 2.9x as likely to say PCs have the advantage in terms of price-to-performance ratios (57% vs. 20% giving the edge to Macs).

Whether from a manageability perspective or when evaluating key aspects of the end-user experience, IT respondents are far more likely to think PCs have the edge than they are to think Macs do.

Of course, it is important to keep in mind that not all PC environments are the same, and there is far more ecosystem variety than with Macs. To this end, ESG believes these advantages are greatest when organizations pivot fully to a modern management approach and do so with discipline, avoiding agent bloat as they move toward cloud-based management solutions.

Which Platform Has the Advantage in the Various Aspects of Device Management

- Percentage of respondents giving Macs the edge
- Percentage of respondents giving Windows the edge



Quantifying Key Gaps Between PCs and Macs

The research went beyond asking respondents which platform they believe has the advantage, asking them to estimate how big the advantages were in several key areas:

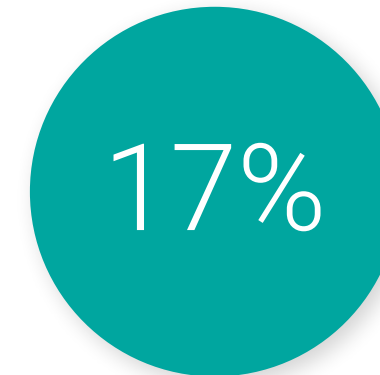
Increased device and peripheral costs: Respondents were asked about the price premiums they associate with both Mac devices and peripherals. On average, respondents estimated that their organization pays a 17% premium for Mac devices and a 15% premium for associated peripherals.

Longer break/fix time: ESG asked respondents how long devices are out of service when they require a repair. For PC users, the median time out of service was 1.5 days; for Mac users, the time to repair increased to 3.5 days. The ways users get their devices repaired (e.g., working with IT on a repair for a PC vs. taking a Mac device to an Apple store) likely contribute to this difference. However, whatever the cause may be, PCs are more often reported to be repaired in 2 days or less (50% vs. 41%), and Macs more often take 5 days or more (19% vs. 12%).

Costs of repair: In addition to evaluating time to repair, respondents were asked about the typical costs to repair both PCs and Macs. On average, respondents estimated Macs to cost 32% more than PCs to repair.

While none of these differences are as dramatic as prior findings, at scale it is clear how significantly more expensive devices and peripherals, which take longer and cost more to repair (when needed), can combine to have a dramatic impact in the cost to support and manage the device environment.

The Price Premium Associated With Mac Devices and Peripherals

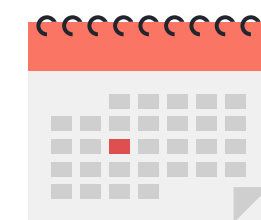


Mean device premium



Mean peripheral premium

How Long Devices Are Typically Out of Service When They Need Repairs (Median Number of Days)



Macs



PCs

How Much the Typical Device Repair Costs (Mean Dollars)



Macs



PCs

As Macs Become More Prevalent, Challenges Supporting Them Often Become More Acute

As noted earlier, within the research data, respondents quantify what percentage of users use a Mac device as their primary work computer. ESG used this data to create three tiers of mixed device environments:

- Organizations with a *low* degree of mixed devices, where 10% or fewer end users use a Mac.
- Organizations with a *moderate* degree of mixed devices, where 11%-20% of end users use a Mac.
- Organizations with a *high* degree of mixed devices, where more than 20% of end users use a Mac.

ESG also asked respondents three key questions:

1. Is the volume of support tickets submitted by Mac users larger than what you would expect, about what you would expect, or less than what you would expect, *relative to the number of users supported?*
2. Is the number of times you've needed to reinstall the operating system on Mac devices due to issues greater than what you would expect, about what you would expect, or less than what you would expect, *relative to the number of users supported?*
3. Is the number of times Mac users have caused data loss greater than what you would expect, about what you would expect, or less than what you would expect, *relative to the number of users supported?*

In each case, as respondents reported the size of their Mac user base increased, so did their propensity to say that issues reported by Mac users were larger than they should have been. The implication of this trend is that, for many organizations, as the Mac user count increases, it tends to hit an inflection point where the issues start growing at an outsized rate.

As it relates to tickets, this phenomenon may be caused by the Mac user base scaling to end users who are not as experienced with the platform or who rely on apps that are incompatible with the platform. As it relates to OS reinstalls, this trend may be driven by the fact that IT administrators may over-rely on this action, as they don't have the expertise to troubleshoot specific issues on Macs. And finally, as it relates to data loss, these issues may become more apparent as the Mac user base grows, as data loss prevention (DLP) or backup solutions may not adequately extend to Macs.

Whatever the root causes, the data makes it clear that, as the number of Mac users grows beyond a niche subset of users, the challenges presented by supporting those users tend to become much more acute.

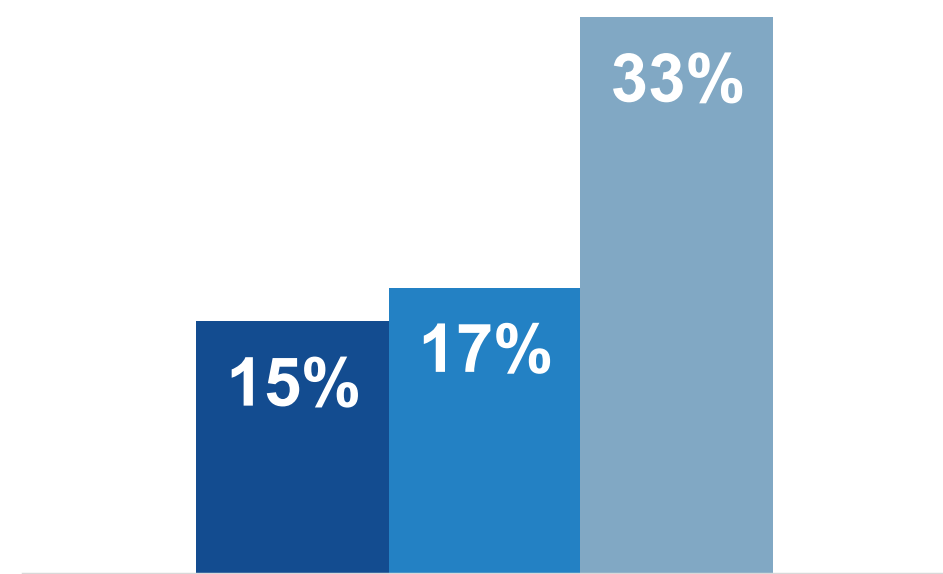


Tickets, Reinstalls Needed, and Data Loss Incidents All Tend to Increase Disproportionately as Mac User Counts Scale

■ Low degree of device diversity (N=164) ■ Moderate degree of device diversity (N=150) ■ High degree of device diversity (N=236)



Tickets from Mac users are...

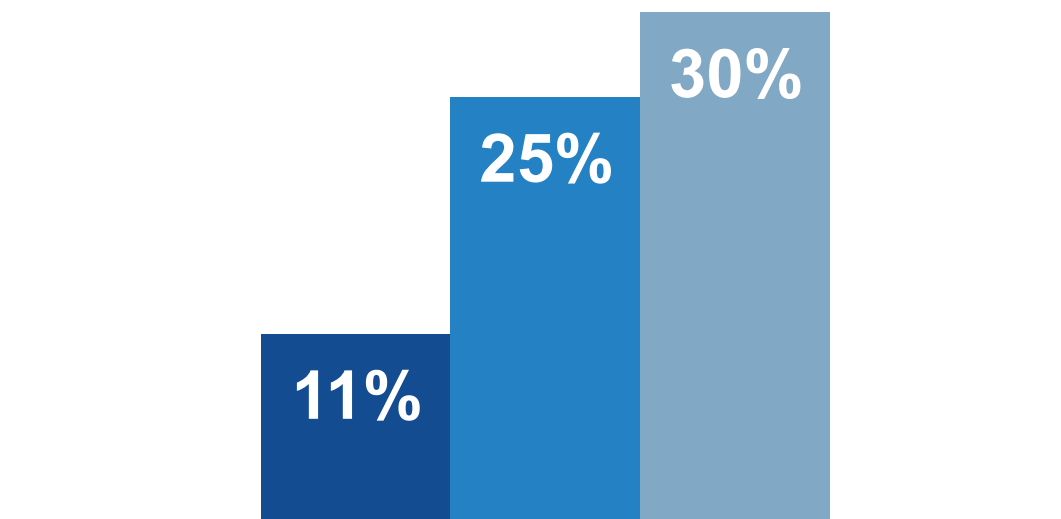


More frequent than I'd expect them to be relative to the number of users

Organizations with the most Macs are more than twice as likely to say Mac ticket volumes are outsized.

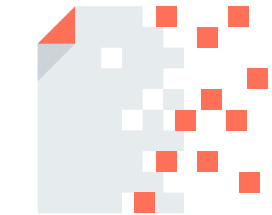


Reinstalls needed by Mac users are...

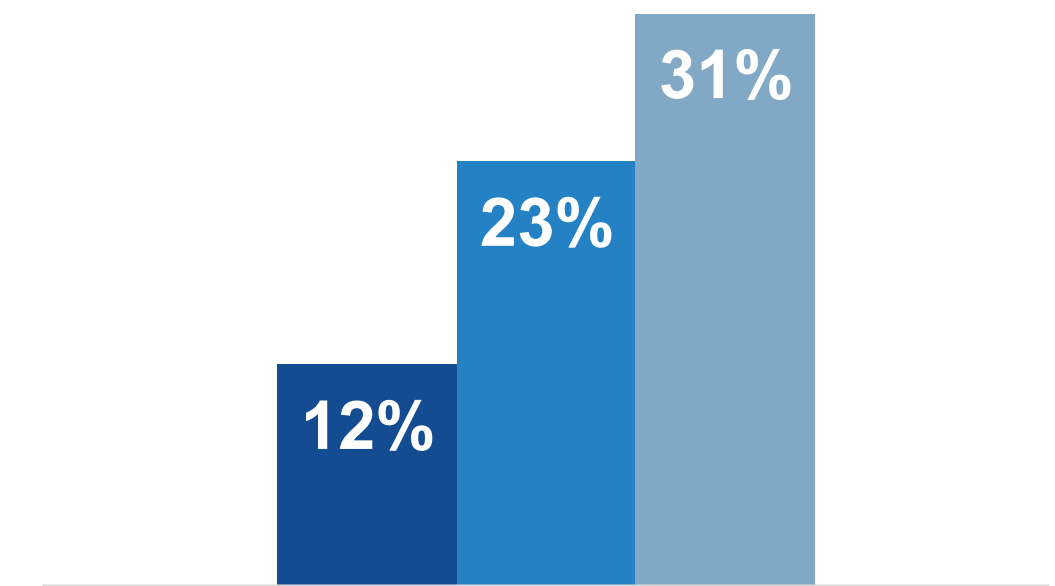


More common than with other platforms, relative to the number of users

Organizations with the most Macs are 2.7x as likely to say reinstalls needed are greater than expected.




Instances of data loss caused by Mac users are...



More frequent than other platforms, relative to the number of users

Organizations with the most Macs are 2.6x as likely to say instances of data loss caused by Macs are more frequent than they should be.



A Detailed Comparison of Knowledge Workers' Perceptions of, and Experiences With, Windows and Mac Platforms

Mac Users Have the *Perception* That Their Devices Give Them a Better Experience

The data discussed up to this point was provided by IT decision-makers and practitioners. The survey also included the perceptions of 1,000 corporate knowledge workers, including 474 Mac users and 496 Windows PC users.

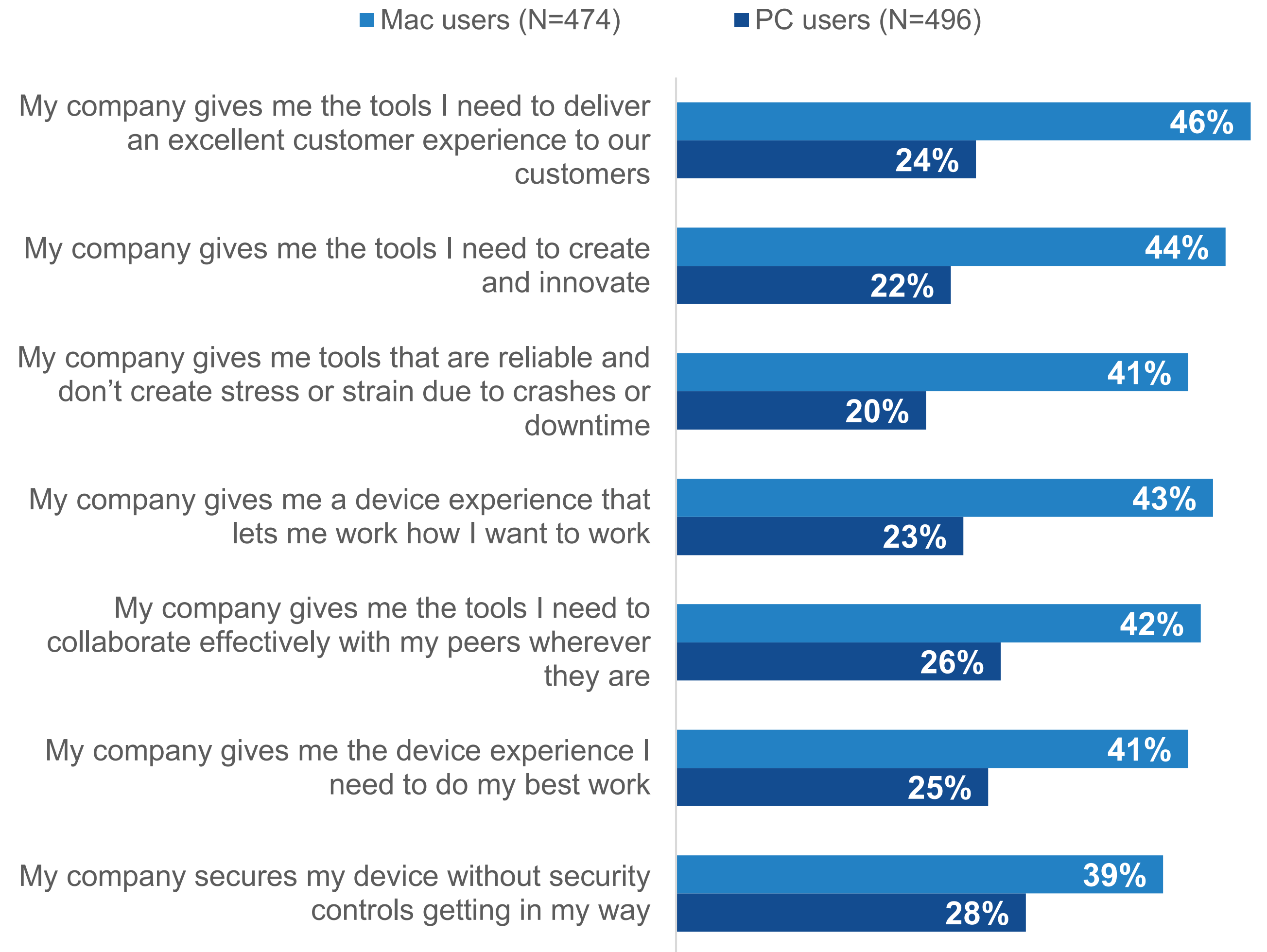
Data from these knowledge workers is noteworthy, as it uncovers an interesting dichotomy: On one hand, Mac users are much more apt to believe their device experience is superior, but on the other they also report encountering hardware issues and software compatibility issues more often, requiring more OS reinstallations than their PC-using peers.

First, as it relates to perception, Mac users have a much higher level of advocacy for their devices. ESG once again employed an NPS methodology in asking end users how likely they would be to recommend their primary work laptop or desktop to a friend or colleague. The NPS among Mac users was measured as +63 vs. just +6 among PC users.

Additionally, ESG went on to ask these knowledge workers if they agree or disagree that their organization is providing them with a device experience that empowers them in a variety of ways. Here, again, Mac users were more apt to agree their device experience helps them deliver excellent customer experiences, helps them create and innovate, helps them avoid downtime, and more.

Clearly, Mac users have a strong sense of loyalty and belief in their devices, even if the reality of their experience does not always reflect these sentiments.

Percentage of Users That Strongly Agree With Each Statement Relating to Their Device Experience



In Reality, Mac Users Are Encountering Issues More Often Than Their PC-using Peers

HARDWARE ISSUES:

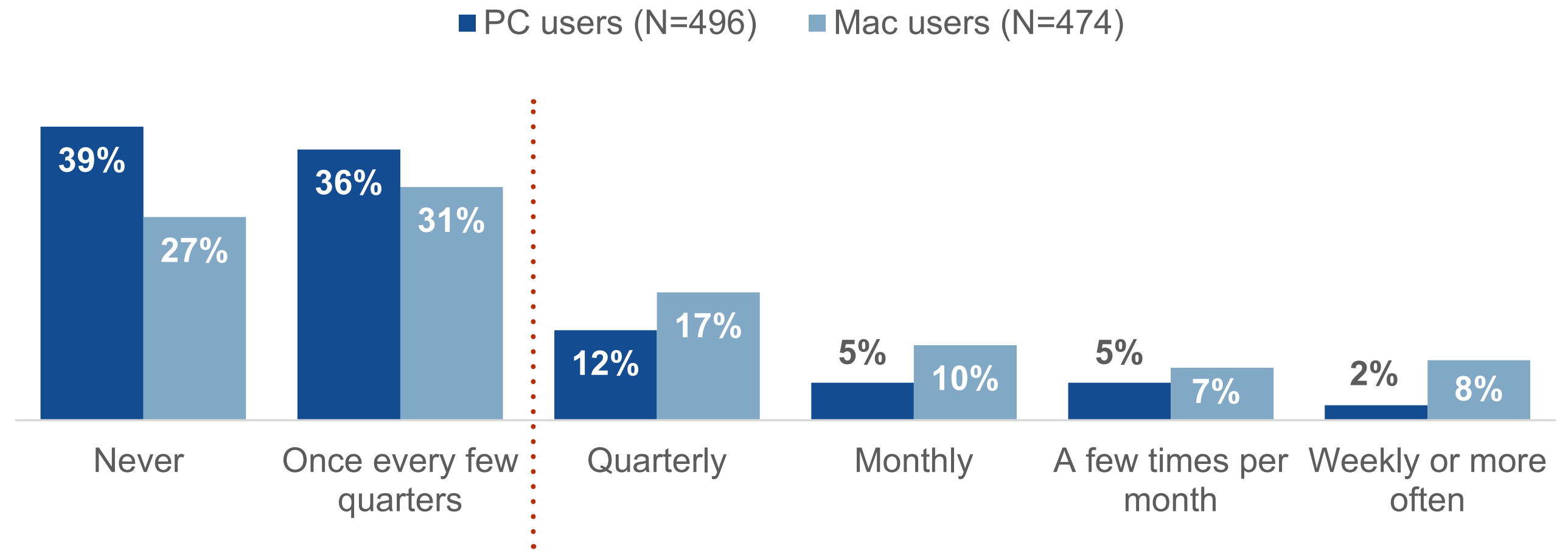
End users were asked to estimate how often over the past year they've encountered a multitude of hardware issues like failing monitors, broken trackpads, split hinges, and more. In this context, Mac users reported more frequent issues: 42% said they run into these types of problems quarterly or more often vs. 24% of PC users. On the flip side, PC users more often said they've not run into any of these issues in the past year or only once every few quarters. Based on ESG's analysis, the average Mac user reported encountering roughly 8.5 hardware issues in the past year vs. 3.9 issues for the average PC user.

SOFTWARE ISSUES:

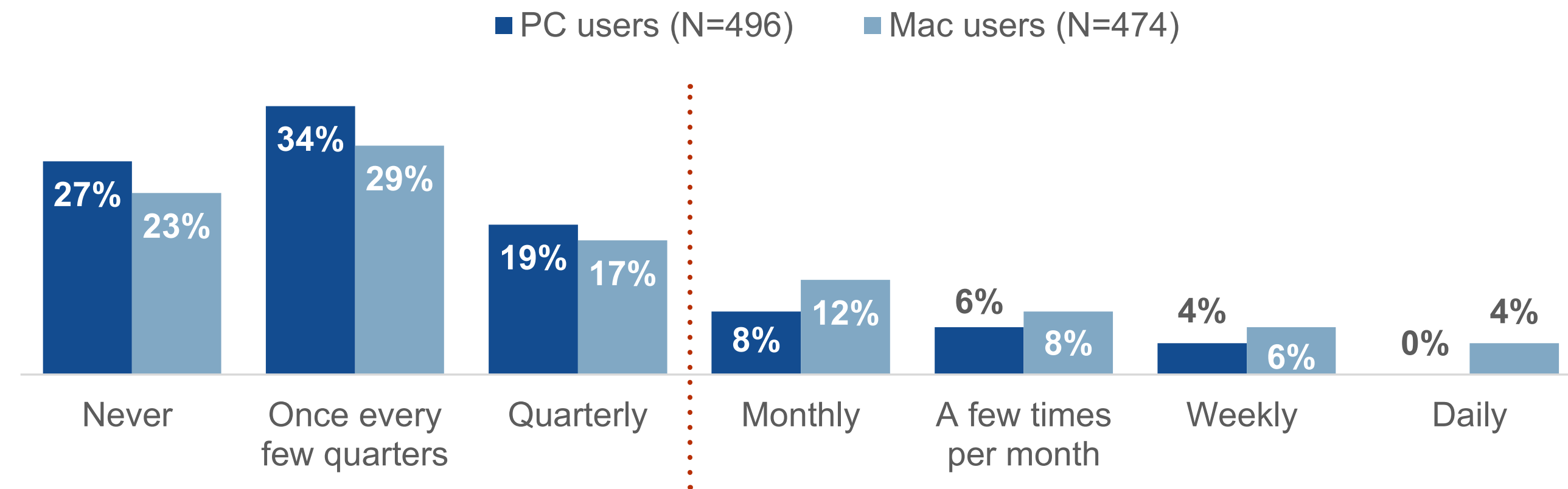
Similarly, end users were asked to estimate how frequently they've been faced with software issues like a hanging OS, application crashes, application incompatibilities, etc. Again, Mac users reported more often running into issues that had hindered their user experience: 30% said they run into these types of problems at least monthly vs. 18% of PC users. Based on ESG's analysis, the average Mac user reported encountering roughly 20.4 software issues in the past year vs. 8.7 issues for the average PC user.

This data underscores the dichotomy referenced earlier: While Mac users more often strongly feel they have a device experience that helps them be efficient, avoid downtime, and do their best work in practice, PC users seem to be less often faced with issues that could derail their productivity.

Frequency With Which Users Said They Encounter Hardware Issues



Frequency With Which Users Said They Encounter Software Issues



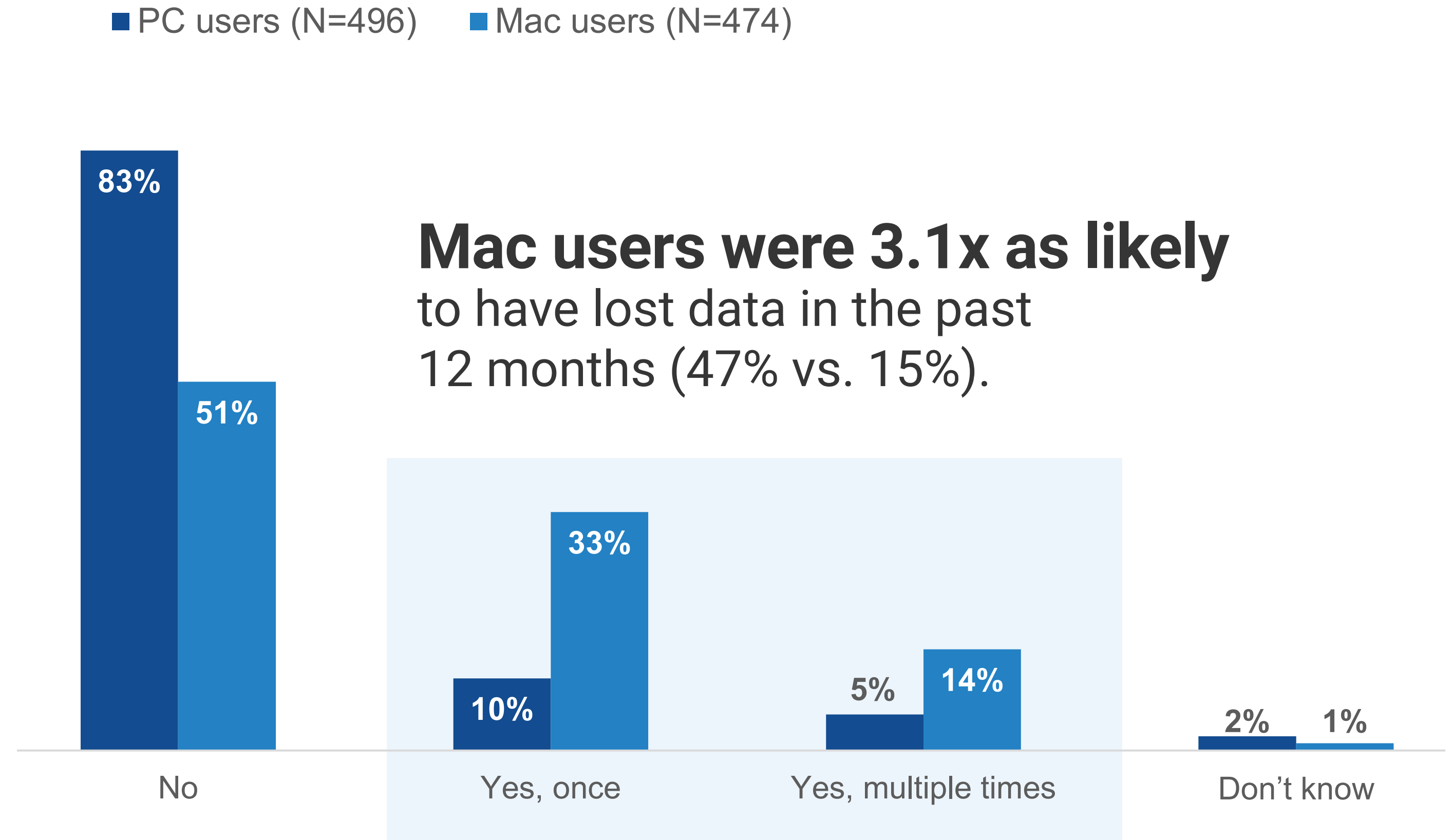
In Reality, Mac Users Appear to be Introducing More Enterprise Risk Than Their PC-using Peers

Even though Mac users were more apt to strongly agree that their device experience provides security without friction (39% vs. 28% of PC users), in practice Mac users were much more likely to report they have been a victim of data loss or theft due to malware or device compromise: 47% of Mac respondents reported they had been made aware they were victims of such instances of data loss in the past year vs. just 15% of PC users.

In part, Mac users may be victims of a misconception that Macs are immune to malware or security threats. This false sense of security might lead users to be less cautious, making them more susceptible to falling victim to phishing attacks, downloading malicious software, or engaging in risky online behaviors that could lead to data loss.

Of course, the risk of data loss depends much more on user behavior, awareness, and adherence to best practices than the choice of an operating system. But it is interesting to note that Mac users have more often been victims of data exfiltration or loss than their PC-reliant counterparts.

Frequency With Which Users Said They Have Lost Sensitive Data



Conclusion

There is no one right answer for how many and which knowledge workers within an organization should use a Mac vs. a PC. Though every organization will decide what's for their user base, it's important to consider the value of applying modern management practices in order to cut costs, improve EUX, and minimize overhead, among many other benefits. That said, this research shows several trends that are worthwhile for IT decision- and policy-makers to consider:

- Looking at the market in the aggregate, the use of Macs as a primary work desktop or laptop is expected to decline slightly over the next three years.
- There are material cost differences between Macs and PCs that can quickly add up if the use of Macs becomes widespread.
- Organizations that have allowed more of their users to leverage Mac devices for work are more apt to report that those users are causing more issues than would be expected given the size of the user base.
- And, while Mac users feel their device experience is superior, in practice they more often report grappling with hardware, software, and security issues.

ESG believes that organizations looking to refine their device policies with an eye toward increasing productivity, reducing costs, optimizing employee engagement, and accelerating time to market should leverage a quantified digital experience score that combines both user sentiment and hard data retrieved from the endpoints to guide their decisions, rather than relying on employee or IT decision-makers' sentiments alone.

How Intel Can Help

PCs built on Intel vPro are designed for the IT professionals of today and tomorrow, with forward-looking features designed to help you confidently navigate the future of enterprise IT security and empower your team to connect and collaborate more seamlessly. Intel vPro moves business forward by helping you pivot and scale, with amazing speed and flexibility, to capture more opportunities. Get a boost with advanced, out-of-the-box features and support for multiple operating systems and platforms.

With Intel vPro, your PCs will have the power business requires—to help improve productivity through enhanced performance, help strengthen data security, and give you greater fleet management control. Intel vPro is the business computing foundation that makes PCs professional-grade, so IT can be confident with interoperable tools to enhance user productivity, help secure business data, manage critical devices remotely, and scale their fleet with confidence on a reliable foundation. All integrated into a single solution, Intel vPro will help your business thrive in a rapidly changing digital world.

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Research Methodology and Respondent Demographics

To gather data for this eBook, Enterprise Strategy Group conducted a comprehensive online survey of 550 IT professionals responsible for end-user device support and management at their organization and 1,000 corporate knowledge workers that spend the majority of their productive working hours using either a laptop or desktop computer.

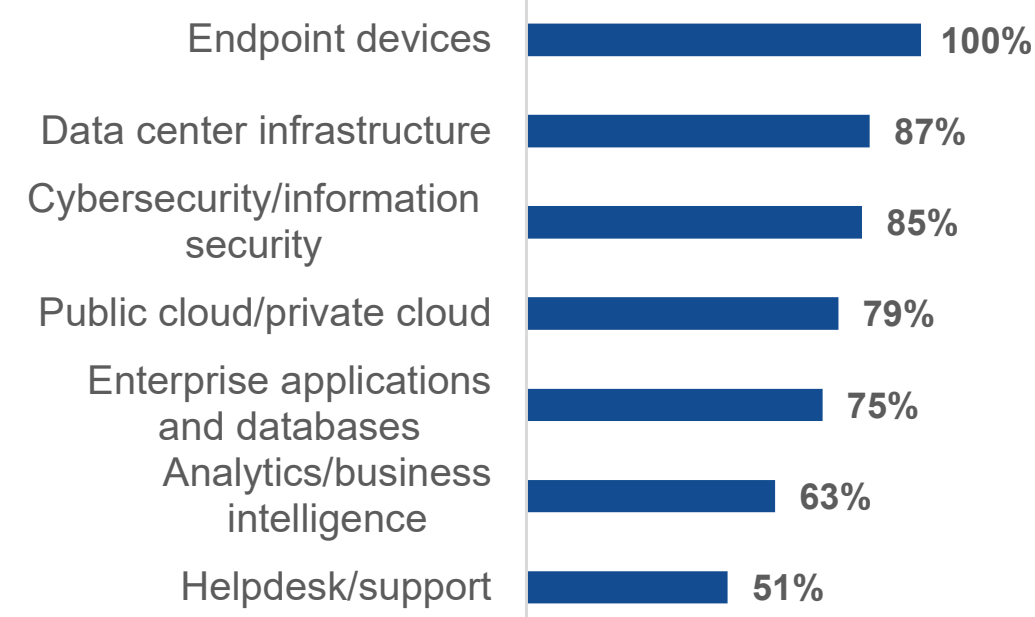
Organizations represented span all private- and public-sector verticals, including financial, manufacturing, technology, retail/wholesale, etc. The research spanned both midmarket organizations (i.e., those with 100 to 999 employees, 44%) and enterprises (i.e., those with 1,000+ employees, 56%).

The research was global, including respondents based in the U.S. (28%), Canada (11%), the U.K. (10%), Germany (10%), France (11%), Australia (7%), New Zealand (4%), Japan (10%), and Singapore (11%). The survey was fielded between September 20, 2023, and October 21, 2023.

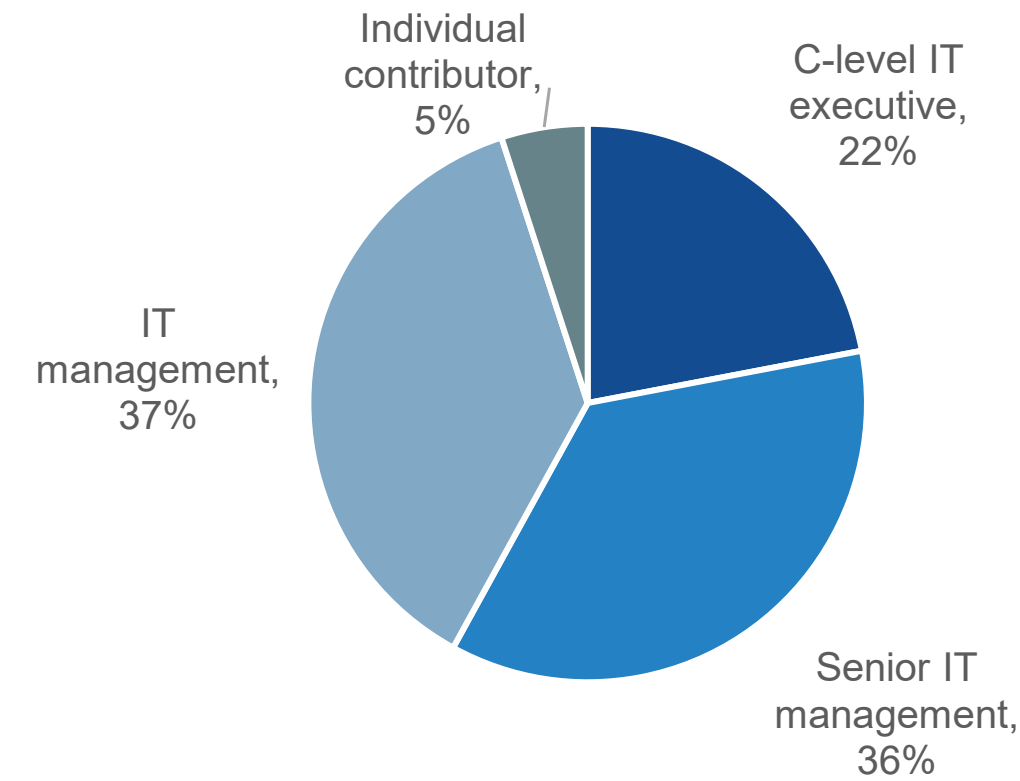
The margin of error at the 95% confidence level for sample sizes of n=550 and n=1,000 are + or - 4 and 3 percentage points, respectively.

Note: Totals in figures and tables throughout this report may not add up to 100% due to rounding.

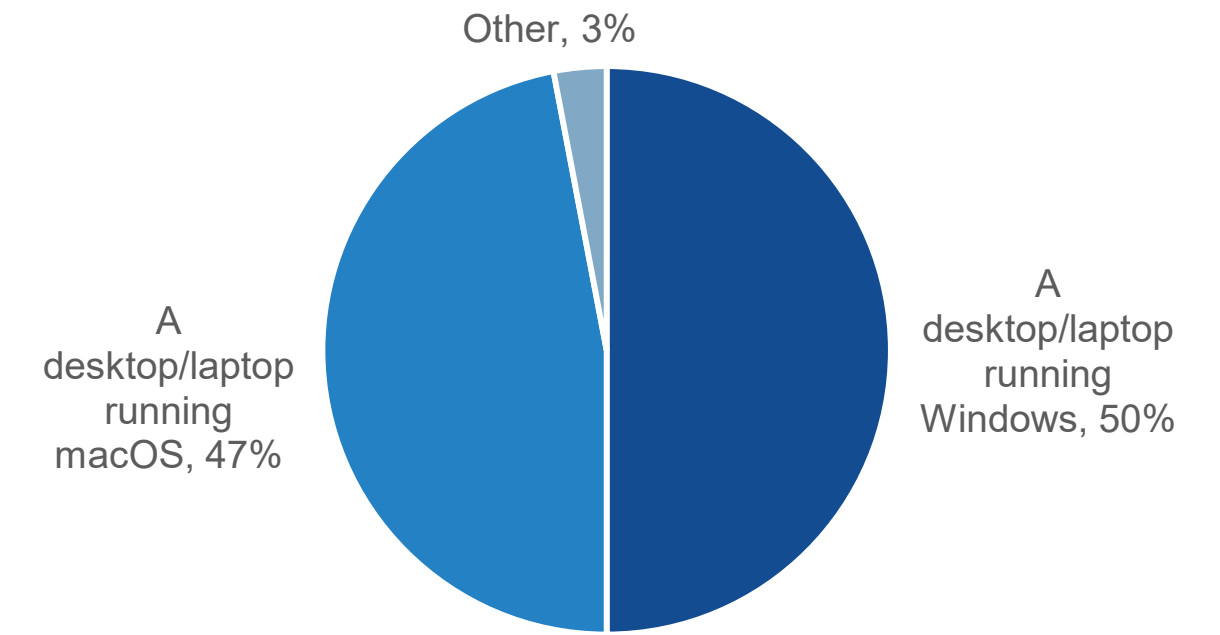
IT RESPONDENTS, BY AREAS OF PURCHASE AUTHORITY



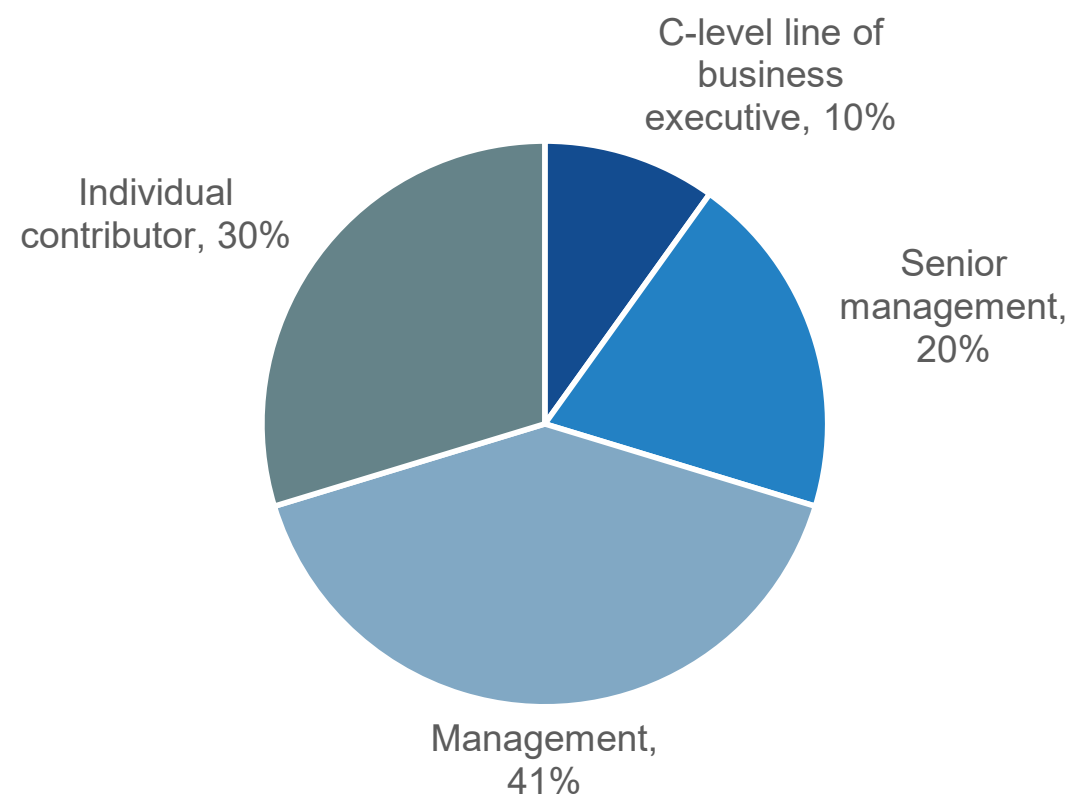
IT RESPONDENTS, BY SENIORITY



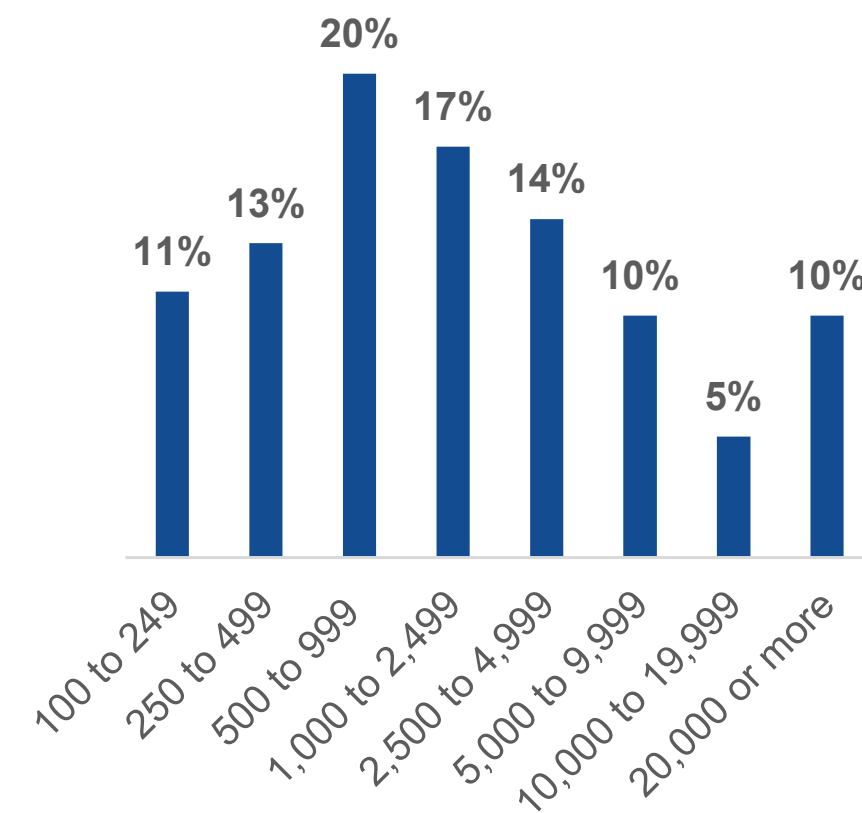
KNOWLEDGE WORKERS, BY DEVICE PLATFORM PRIMARILY RELIED UPON FOR WORK



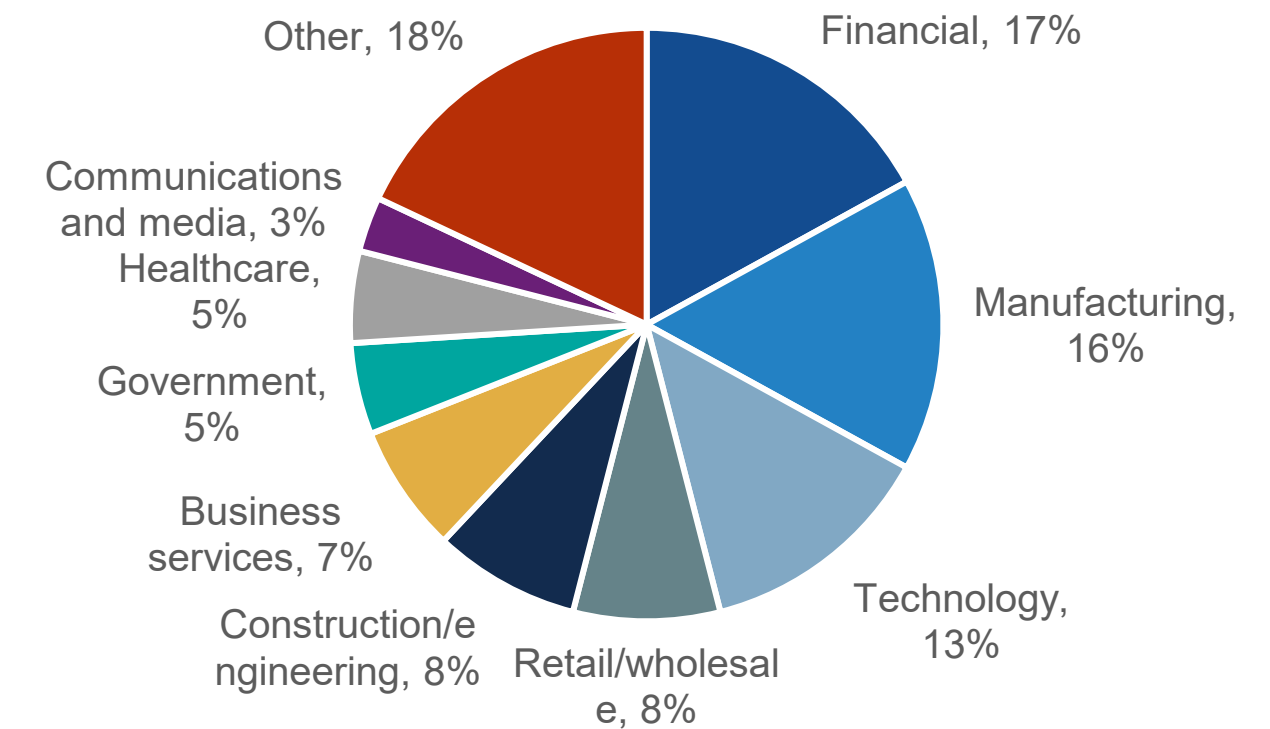
KNOWLEDGE WORKERS, BY SENIORITY



ALL RESPONDENTS, BY COMPANY SIZE



ALL RESPONDENTS, BY COMPANY INDUSTRY



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