CORONAVIRUS GLOBAL IMPACT SURVEY

NOW AND NEXT

INSIGHT FROM THE GLOBAL IT COMMUNITY

A poll of ITDMs on The Register: July 2020
346 respondents
Do you see a return to 'normal' office working?

<table>
<thead>
<tr>
<th>Region</th>
<th>No (%)</th>
<th>Yes (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMEA</td>
<td>82%</td>
<td>18%</td>
</tr>
<tr>
<td>NA</td>
<td>76%</td>
<td>24%</td>
</tr>
<tr>
<td>APAC</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>Total</td>
<td>77%</td>
<td>23%</td>
</tr>
</tbody>
</table>
Do you see a return to 'normal' office working?

- 1000 Plus
  - No: 89%
  - Yes: 11%

- 251 - 1000
  - No: 75%
  - Yes: 25%

- 1 - 250
  - No: 64%
  - Yes: 36%
WHAT PERCENTAGE OF YOUR SEATS DO YOU SEE AS BEING REMOTE IN FUTURE?

<table>
<thead>
<tr>
<th>Region</th>
<th>25% - 50%</th>
<th>50% - 75%</th>
<th>75% - 100%</th>
<th>Below 25%</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>14%</td>
<td>46%</td>
<td>20%</td>
<td>27%</td>
</tr>
<tr>
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<td>32%</td>
</tr>
<tr>
<td>APAC</td>
<td>28%</td>
<td>36%</td>
<td>11%</td>
<td>25%</td>
</tr>
<tr>
<td>Total</td>
<td>19%</td>
<td>41%</td>
<td>13%</td>
<td>27%</td>
</tr>
</tbody>
</table>
WHAT PERCENTAGE OF YOUR SEATS DO YOU SEE AS BEING REMOTE IN FUTURE?

<table>
<thead>
<tr>
<th>COMPANY SIZE</th>
<th>Below 25%</th>
<th>25% - 50%</th>
<th>50% - 75%</th>
<th>75% - 100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000 Plus</td>
<td>14%</td>
<td>28%</td>
<td>43%</td>
<td>15%</td>
</tr>
<tr>
<td>251 - 1000</td>
<td>19%</td>
<td>17%</td>
<td>44%</td>
<td>19%</td>
</tr>
<tr>
<td>1 - 250</td>
<td>26%</td>
<td>31%</td>
<td>36%</td>
<td>7%</td>
</tr>
</tbody>
</table>
WHAT IS YOUR MAIN SHORT-TERM PRIORITY?

- Security: 29%
- New business processes: 17%
- End user hardware / software: 15%
- Off Prem: 11%
- Hybrid: 7%
- On Prem: 7%
- Storage: 5%
- Networking: 4%
- Other: 5%
WHAT IS YOUR MAIN LONG-TERM PRIORITY?

- Security: 23%
- New business processes: 14%
- Hybrid: 11%
- Off Prem: 11%
- Other: 7%
- End user hardware / software: 5%
- Networking: 3%
- On Prem: 3%
- Storage: 3%

WHAT IS YOUR MAIN LONG-TERM PRIORITY?
WHAT HAVE YOU SIGNIFICANTLY DEPRIORITYED?

- On Prem: 38%
- New business processes: 18%
- End user hardware / software: 11%
- Storage: 8%
- Other: 8%
- Off Prem: 5%
- Networking: 4%
- Security: 2%
- Hybrid: 6%
WHAT IS YOUR MAIN SHORT-TERM PRIORITY?

- **Security**
- **New business processes**
- **End user hardware / software**
- **Off Prem**
- **Hybrid**
- **Networking**
- **Other**
- **On Prem**
- **Storage**

### NA
- 31% Security
- 20% New business processes
- 10% End user hardware / software
- 10% Off Prem
- 5% Hybrid
- 3% Networking
- 7% Other
- 8% On Prem
- 5% Storage

### EMEA
- 27% Security
- 15% New business processes
- 17% End user hardware / software
- 13% Off Prem
- 8% Hybrid
- 4% Networking
- 6% Other
- 5% On Prem
- 5% Storage

### APAC
- 31% Security
- 19% New business processes
- 19% End user hardware / software
- 8% Off Prem
- 6% Hybrid
- 6% Networking
- 6% Other
- 3% On Prem
- 3% Storage
WHAT IS YOUR MAIN LONG-TERM PRIORITY?

<table>
<thead>
<tr>
<th>Region</th>
<th>Security</th>
<th>New business processes</th>
<th>Hybrid</th>
<th>Off Prem</th>
<th>Other</th>
<th>End user hardware / software</th>
<th>Networking</th>
<th>Other</th>
<th>On Prem</th>
<th>Storage</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>31%</td>
<td>24%</td>
<td>12%</td>
<td>8%</td>
<td>7%</td>
<td>3%</td>
<td>5%</td>
<td>7%</td>
<td>3%</td>
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</tr>
<tr>
<td>EMEA</td>
<td>23%</td>
<td>18%</td>
<td>17%</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>APAC</td>
<td>11%</td>
<td>31%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
<td>6%</td>
<td>11%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
WHAT IS YOUR MAIN SHORT-TERM PRIORITY?

- **Networking**: 29%
- **Storage**: 28%
- **On Prem**: 27%
- **Other**: 14%
- **Hybrid**: 12%
- **Off Prem**: 10%
- **End user hardware / software**: 7%
- **New business processes**: 6%
- **Security**: 5%

**Company Size**

- **1000 Plus**
  - Networking: 29%
  - Storage: 15%
  - On Prem: 15%
  - Other: 10%
  - Hybrid: 5%
  - Off Prem: 6%
  - End user hardware / software: 10%
  - New business processes: 3%
  - Security: 6%

- **251 - 1000**
  - Networking: 28%
  - Storage: 11%
  - On Prem: 17%
  - Other: 8%
  - Hybrid: 8%
  - Off Prem: 11%
  - End user hardware / software: 6%
  - New business processes: 8%
  - Security: 3%

- **1 - 250**
  - Networking: 29%
  - Storage: 26%
  - On Prem: 14%
  - Other: 14%
  - Hybrid: 14%
  - Off Prem: 7%
  - End user hardware / software: 3%
  - New business processes: 5%
  - Security: 2%
WHAT IS YOUR MAIN LONG-TERM PRIORITY?

- Storage
- On Prem
- Networking
- End user hardware/software
- Other
- Off Prem
- Hybrid
- New Business Processes
- Security

**COMPANY SIZE**

1000 Plus:
- Storage: 11%
- On Prem: 27%
- Networking: 14%
- End user hardware/software: 16%
- Other: 10%
- Off Prem: 6%
- Hybrid: 5%
- New Business Processes: 6%
- Security: 4%

251 - 1000:
- Storage: 9%
- On Prem: 18%
- Networking: 20%
- End user hardware/software: 22%
- Other: 9%
- Off Prem: 15%
- Hybrid: 7%
- New Business Processes: 4%
- Security: 3%

1 - 250:
- Storage: 9%
- On Prem: 23%
- Networking: 31%
- End user hardware/software: 9%
- Other: 12%
- Off Prem: 9%
- Hybrid: 9%
- New Business Processes: 5%
- Security: 3%
WHAT HAVE YOU SIGNIFICANTLY DE-PRIORITIZED?

1000 Plus
- Hybrid: 47%
- Security: 19%
- Networking: 11%
- Off Prem: 5%
- Other: 4%
- Storage: 7%
- End user hardware / software: 4%
- New business processes: 14%
- On Prem: 1%

251 - 1000
- Hybrid: 33%
- Security: 19%
- Networking: 11%
- Off Prem: 8%
- Other: 8%
- Storage: 11%
- End user hardware / software: 3%
- New business processes: 3%
- On Prem: 3%

1 - 250
- Hybrid: 28%
- Security: 16%
- Networking: 12%
- Off Prem: 12%
- Other: 12%
- Storage: 2%
- End user hardware / software: 7%
- New business processes: 7%
- On Prem: 4%