INTELLIGENT DEVICES BOOST WORKER PERFORMANCE IN THE COLLABORATIVE ENTERPRISE

Businesses with heavy users of collaboration tools, such as headsets, experience 26% higher revenue growth rates, on average, than their peers.
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MEGA TRENDS ARE SHAPING NEW WORK STYLES

Changing workforce demographics, office design and organizational structures will determine the work styles of the future.

- A blended workforce comprising Gen Z to Baby Boomers requires tools and spaces designed for flexibility.
- Versatile, open offices promote collaboration and innovation, intelligently allocate space and reduce costs.
- Worker mobility is on the rise.
- More businesses are global, with customers, employees and partners located anywhere.
- Virtual organizations proliferate.

By 2025 Millennials will represent 75% U.S. Workforce and 30% Global Population.

Gen Z already accounts for 61 million people in the U.S. One-third of companies report that at least 25% of employees work in satellite offices and 25% of employees telecommute from home.

One-third of employees work in satellite offices.

One-third of employees telecommute from home.

Source: Bridgeworks.

One-third of employees report that at least
EMBRACING DIGITAL TRANSFORMATION TO REMAIN COMPETITIVE

To address new employee and customer requirements, businesses are deploying contemporary communications and collaboration solutions and the intelligent devices that support them.

- **Accelerated technology development** is enabling companies to innovate faster, operate more economically and disrupt their markets with new offerings and business models.

- **Intensifying competition** is compelling businesses to transform through digital technologies to sustain growth, reach new customers and withstand competition.

- **Talent scarcity** and the need to attract and retain qualified workers are driving technology investments to support increasingly global and distributed organizations.

- **Employee productivity and job satisfaction** are dependent on optimized technology and work styles.

### Top IT Investment Drivers 2017–2019

- Improve productivity: 39%
- Reduce operational costs: 33%
- Improve customer experience: 32%
- Improve digital presence: 30%
- Boost creativity and innovation: 28%
- Improve collaboration: 26%
- Improve sales and marketing effectiveness: 24%
- Expand to new markets, new regions: 23%
- Accelerate decision making: 21%
- Attract and retain workforce: 19%

*Source: Frost & Sullivan.*
SMART COMPANIES ARE REDEFINING THE USER EXPERIENCE

With the right collaboration tools, users are increasingly able to do more.

INTUITIVE AND CONTEXTUAL
Communications embedded in business and productivity apps (e.g., CRM, G Suite, Office 365) with a familiar user interface streamline workflows and facilitate friction-free processes and communications.

INTEGRATED
75% of IT decision makers consider integrating their communications/collaboration tools with other business software to be critical for their organization.

ACCESSIBLE ANYWHERE, ANYTIME
Software-based communications reduce costs and enable seamless, harmonized service delivery across devices and networks.

FRICITONLESS
Integrated real-time communications that include social media and team spaces reduce switching between apps and augment the user experience, driving team collaboration.

VISUAL AND NATURAL
Feature-rich multimodal collaboration tools enhance teamwork, accelerate decision making and boost innovation.

DEVICE DIVERSITY IS THE NEW NORMAL
The pervasive use of smartphones and tablets, desktop phones and PC-based soft clients within business environments requires purpose-built devices, such as headsets, that intelligently bridge multiple communications endpoints.

In more than 25% of organizations

more than 50% of employees use smartphones for business purposes

IT/telecom decision makers say devices are a top investment priority

Source: Frost & Sullivan
CONTEMPORARY COLLABORATION TOOLS ARE MISSION-CRITICAL ACCORDING TO IT/TELECOM DECISION MAKERS

Growing importance of collaboration tools leads to more pervasive adoption within the organization.

<table>
<thead>
<tr>
<th>CONFERENCING AND COLLABORATION TOOLS ARE IMPORTANT</th>
<th>EMPLOYEES MAKE GOOD USE OF EMPLOYER-PROVIDED CONFERENCING TOOLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees make good use of employer-provided conferencing tools</td>
<td>Audio Conferencing: 45% provided to all, 60% used daily.</td>
</tr>
<tr>
<td>Tools provided to all</td>
<td>Desktop Video Conferencing: 44% used daily.</td>
</tr>
<tr>
<td>Tools used daily</td>
<td>Web Conferencing: 37% used daily.</td>
</tr>
</tbody>
</table>

More than 80% say conferencing and collaboration tools are important or very important.

- **Desktop video conferencing**: 86% boost productivity, 86% improve collaboration and accelerate decision making.
- **Web conferencing**: 85% boost productivity, 84% improve collaboration and accelerate decision making.
- **UC clients**: 85% boost productivity, 84% improve collaboration and accelerate decision making.

Source: Frost & Sullivan.
MODERN DEVICES DELIVER CLEAR VALUE
A complete collaboration solution, including the right devices, is required to achieve greater user performance.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONCENTRATION AND PRODUCTIVITY</td>
<td>Noise cancellation and hands-free headset features, paired with the right keyboard and mouse, enhance concentration and reduce errors and task time.</td>
</tr>
<tr>
<td>COLLABORATIVE DECISIONS</td>
<td>In combination with robust conferencing and collaboration services, headsets, USB speakers, webcams and conference devices (conference bridges, cameras and touch control pads) improve teamwork and accelerate decision making.</td>
</tr>
<tr>
<td>ENGAGEMENT</td>
<td>Webcams, headsets, USB speakers and conference devices connect distributed workers for more engaging conversations and a stronger sense of team.</td>
</tr>
<tr>
<td>MULTI-TASKING AND TASK BRIDGING</td>
<td>Modern headsets enable Millennial and Gen Z users, whose personal and business lives are intertwined, to conveniently switch between tasks (e.g., from listening to music to making a business call) on the same device.</td>
</tr>
<tr>
<td>EFFICIENCY</td>
<td>Multimodal headsets allow users to jump among devices—smartphones, computers and desktop phones—greatly enhancing user efficiency and convenience.</td>
</tr>
<tr>
<td>PRIVACY</td>
<td>Headsets block nearby speakers and reduce the potential for eavesdropping in busy environments, including open offices, homes, airports and coffee shops.</td>
</tr>
<tr>
<td>ERGONOMICS</td>
<td>Comfortable headsets, keyboards and mice reduce strain, relieve stress and enhance job satisfaction.</td>
</tr>
</tbody>
</table>
Intelligent Devices Boost Worker Performance in the Collaborative Enterprise

HEADSETS ARE ESSENTIAL TO DIGITAL TRANSFORMATION
Smart endpoints and peripherals determine the quality of user interactions and overall business performance.

43% of organizations that use headsets give them to all employees

79% of headset adopters use their headsets daily

73% of headset users consider headsets important or very important

67% of users consider headsets table stakes for doing business today

BENEFITS OF HEADSETS

- Improves productivity: 78%
- Improves collaboration/Accelerates decision making: 74%
- Improves customer experience/Attracts and retains customers: 72%
- Improves marketing effectiveness: 71%
- Boosts product innovation: 68%
- Helps us attract and retain workforce: 67%
- Helps us expand to new markets: 65%

Source: Frost & Sullivan.
PERCEIVED VALUE DRIVES ADOPTION
The proof is in the data: collaboration service and device adoption is on the rise.

UC&C TOOLS ARE GROWING FAST

51% plan to INCREASE INVESTMENTS in UC&C tools

Businesses plan to invest more in:
- Desktop video conferencing: 26%
- Audio conferencing: 24%
- Web conferencing: 24%

13.9% CAGR, Cloud Video Conferencing Seats GROWING

2018 - 2023

HEADSETS ARE POPULAR
by 2019
22% plan to invest more in headsets

9.9% CAGR, Headset shipments GROWING

2017 - 2024

Source: Frost & Sullivan
COMPELLING USE CASES ABOUND

Modern devices suit diverse work spaces and work styles.

OPEN OFFICES: Headsets and conferencing devices address worker concentration and productivity challenges in contemporary cubicle-free environments.

EFFECTIVE COLLABORATION: USB/Bluetooth headsets, USB speakers and webcams improve the user experience of software-based communications and collaboration services.

MOBILITY: Cloud-based communications and collaboration services, along with wireless devices such as Bluetooth headsets, speakers, touch control pads, keyboards and webcams, untether staff, preserving the natural flow of conversations and work streams.

BLENDeded EXPERIENCES: Headsets and other portable prosumer devices allow workers to streamline communications and knowledge flow across personal and business communications.

CROSS-FUNCTIONAL: Multi-purpose headsets and USB audio devices support communications, information gathering (via media streaming, webcasts) and entertainment (music, podcasts).

NEW PARADIGMS: Newer designs and features in Bluetooth/USB headsets, speakers, webcams and control pads offer the form and function that contemporary workers want for their modern work styles.
Intelligent Devices Boost Worker Performance in the Collaborative Enterprise

THE RIGHT COLLABORATION TOOLS BOOST BUSINESS OUTCOMES

A holistic approach to collaboration and device adoption is required to boost worker productivity and business agility in a climate of constant change.

- Early digital technology adopters reap tangible benefits, such as attracting top talent and driving operational efficiencies.
- Investments in collaboration services must be complemented by intelligent communications devices such as webcams, PC speakers, headsets and conference phones to ensure greater ROI.

Logitech has many options to boost your business
logitech.com/video-collaboration

ADOPTION OF DIGITAL TRANSFORMATION

EARLY ADOPTERS 43%
EARLY MAJORITY 44%

EARLY ADOPTION AND HIGH GROWTH
Of those who report high annual revenue growth rates

ORGANIZATIONAL EARNINGS
Businesses using desktop video/web conferencing technologies and headsets extensively throughout the day earn up to 62% more, on average, than their peers

69% identify their organizations as early adopters of digital transformation

Source: Frost & Sullivan
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