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Digital

Mobile Employee Survey

A STUDY ON THE GERMAN MARKET, 2019

The world is changing...

We are coming from the industrial and information age, now in the People age. Meaning that it is now key to pay more attention to employee well-being & experience

There are a number of key reasons for that;

- War for talent; Today is hard to recruit the best employee for the job. There is a lot of competition going one, making it possible for the employee to be more demanding
- Consumerization; employee expectation have been impacted by the experiences we all get daily as consumers. Business-to-Consumer companies have taken customer experience to the next level, now having its effect on the Business-to-Employee expectations
- Availability of technology; The speed by which technology develops is immense. Bringing emerging technologies like machine learning, IoT, mixed reality, and also developments like 5G, etc. just into the hands of people, makes us able to do so much more.

With this in mind – what is actually the state of the German market? To find answers, we have initiated a survey under German employees on mobile in the enterprise; Do employees get the device they are used to? Does it make them more productive and satisfied? Is there any difference per industry? And per age?
We hope the results give you some guidance for you own business. We are more then happy to walk you through the findings, and can be more explicit for your industry.

Happy Reading!

Employees are people, full of passion & potential,

enjoying digital lives enriched by mobile devices,

but back at work, they leave the magic at home.

It's time to work the way we live, releasing the potential of our employees.
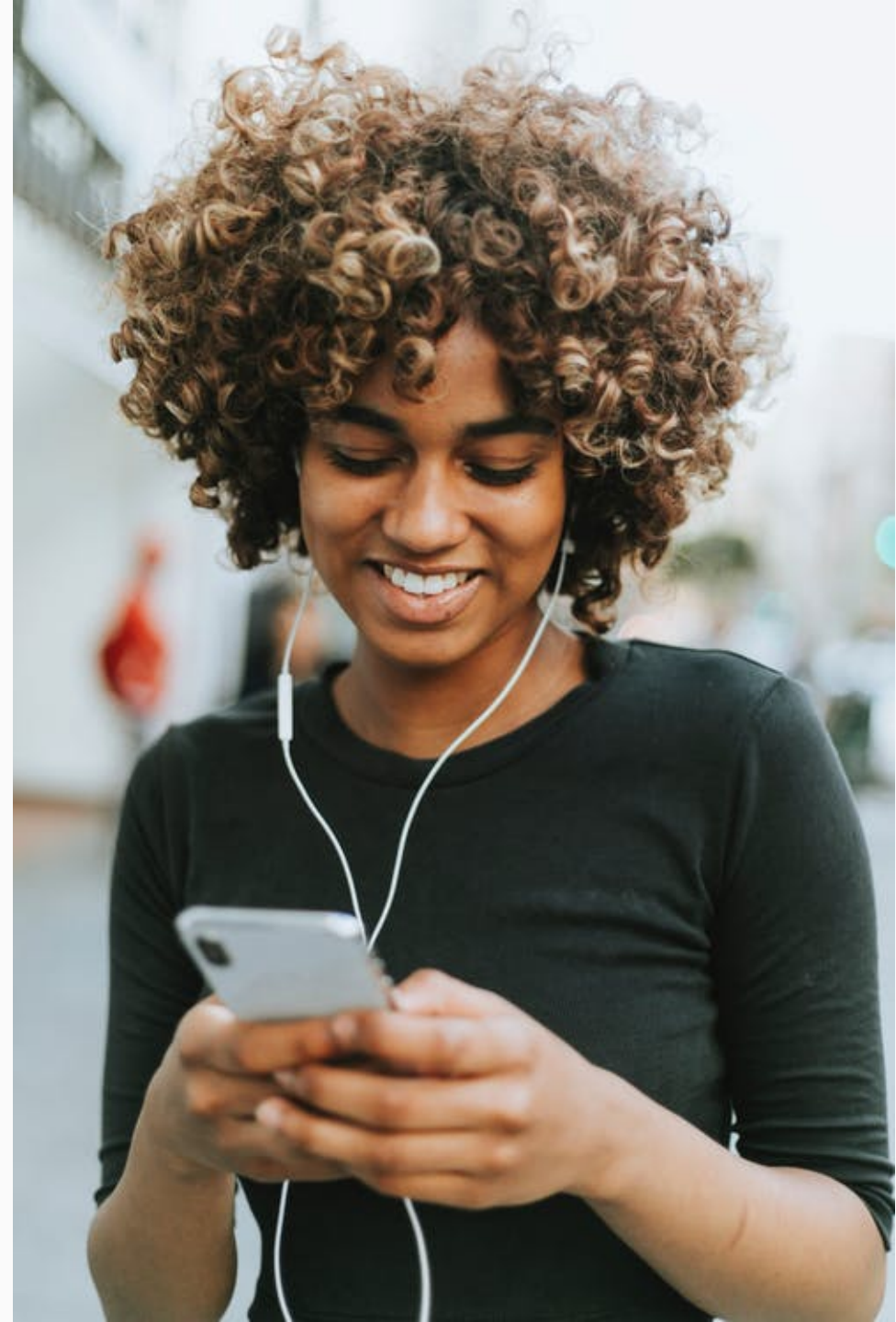
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- Current state of Mobile in the Enterprise

- Mobile in the Enterprise: from an *employee* perspective

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Mobile Employee Survey

A STUDY ON THE GERMAN MARKET

Mobile is starting to enter the enterprise...

The world we live in is hyper connected, with mobile technology woven into everything we do. Mobile is starting to enter the enterprise, becoming more and more essential for businesses today. By integrating mobile technologies, you and your employees can take advantage of the benefits mobile technology has to offer.

Employees are increasingly interested in a flexible work environment, and are putting more demands to their employer to empower them to work where, when, and how they want. The mobile revolution has the potential to transform the workplace, empowering employees to get more done in less time and to do their jobs better, boosting both productivity and retention.

Mobility in the workplace, which focuses on adoption by operational processes within the enterprise, is referred to as Enterprise Mobility.

In essence, Enterprise Mobility is about unlocking the potential for enterprises to improve productivity and operational efficiency by allowing stakeholders, both internal and external, to interact with the enterprise using a mobile device, while still maintaining high levels of security and data protection.

Over the next five years, it is likely that we will see the smartphone become a central part of not only a person's home life, but their working life as well. As technology becomes more sophisticated, employers should and have responded by making mobile devices more accessible a priority for their employees. For some, the smartphone can even replace more traditional devices like the laptop, and for others, it will be the first device they use in the workplace. But the big question remains...

... are businesses taking full advantage of the power of mobile?
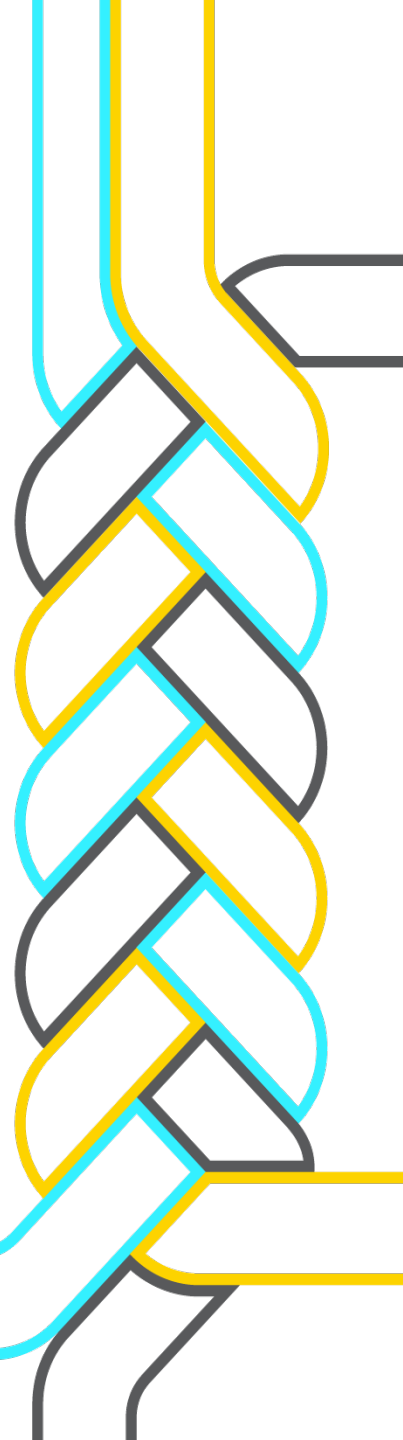
About the research

The **Mobile Employee Survey** provides the first comprehensive map of the state of mobile readiness of the German workforce. It gives an insight on employees in Germany, including how they currently use technology and the size of the opportunity that using mobile devices presents for raise employees' productivity. With these results, we would like to create more awareness and emphasize on the value of mobile within enterprises.

Research objectives and methodology
A quantitative survey was conducted by YouGov on behalf of Deloitte. The survey has been conducted online. The data from the respondents are used only for this research and are treated confidentially.

The survey was conducted among 2008 working age adults across the entire German workforce. Results were weighted to conform to working population data on age, gender, sector, industry and region in Germany.

Research group
This research is conducted using a panel of employees that is a representative of the German market. In order to establish this representative set of the German market, we have determined several requirements to make sure that the ratio's on gender, age, locations are equally distributed.

We have established a total response of 2008 working adults (18 - 65) in Germany, of which 53% are female and 47% are male. The average age of the respondents is 41.3 years.

47%

53%

Additional characteristics of the research group

Type of function of respondents

- Professional work experience: **1333**
- Young professional: **179**
- Other: **109**
- CEO: **72**
- Student / intern: **64**
- Director: **37**

Education

- PhD / Doctorate: **33**
- University / College (Diplom): **260**
- University / College (Master): **108**
- University / College (Bachelor): **108**
- University of Applied Sciences (Master): **36**
- University of Applied Sciences (Bachelor): **96**
- Completed vocational training: **669**
- Grammar school/ High school: **260**
- Higher secondary school: **365**
- Primary school: **66**

Sector

- Non-Profit sector: **121**
- Public sector: **512**
- Private sector: **1375**

Employment

- Not specified: **10**
- Temporary or short term worker: **13**
- Self-employed: **124**
- Full time employment: **1889**

Type of industry of respondents

- Police / fire department: **2**
- Administration / support services: **20**
- Legislation and regulation: **21**
- Mining, Energy & watersupply: **22**
- Marketing / Advertisement: **25**
- Education: **26**
- Pharmaceutical industry: **37**
- Engineering: **41**
- Hotels / entertainment: **48**
- Wholesale supply: **51**
- Construction: **70**
- Transport / logistics: **91**
- Healthcare / social work: **97**
- Financial services: **106**
- Professional services: **119**
- IT / communication: **127**
- Retail: **138**
- Other: **158**
- Manufacturing: **169**

Note: For reasons of simplification, "not specified" answers are not always indicated. Multiple choice for some question types may apply.

Current state of Mobile in the Enterprise

Enterprises are beginning to invest in mobile, but there is significant room for **improvement**.

Enterprises today have started recognizing the potential of mobile in the enterprise. Many have already recognized that there is a possibility for huge benefits when mobile is successfully integrated into workplace routines and activities (e.g. improve productivity and operational efficiency). It all starts with providing your employees with the basics: mobile tooling and solutions that enables them to for example do their work more efficient by giving them access to information wherever they are.

In fact, 52% of employees who are not provided with company devices are using personal devices for work activities, and 42% of the respondents that owns a personal smartphone uses their personal smartphone for work. The frequent use of personal devices for work purposes also indicates that the line between what can be used for personal purposes and for work purposes is blurring. Such uncontrolled use of personal devices often introduces security and data privacy risks to the enterprises.

Laptops and smartphones are being provided to almost 1/3 of the German workforce today (26% provide laptops, while 20% provide smartphones). This demonstrates that the German workforce is already becoming more flexible and supportive of remote work. At the same time, there is still a huge group of employees that are not being equipped with mobility-friendly devices.

Which of the following *personal* devices do you use for work-related tasks?
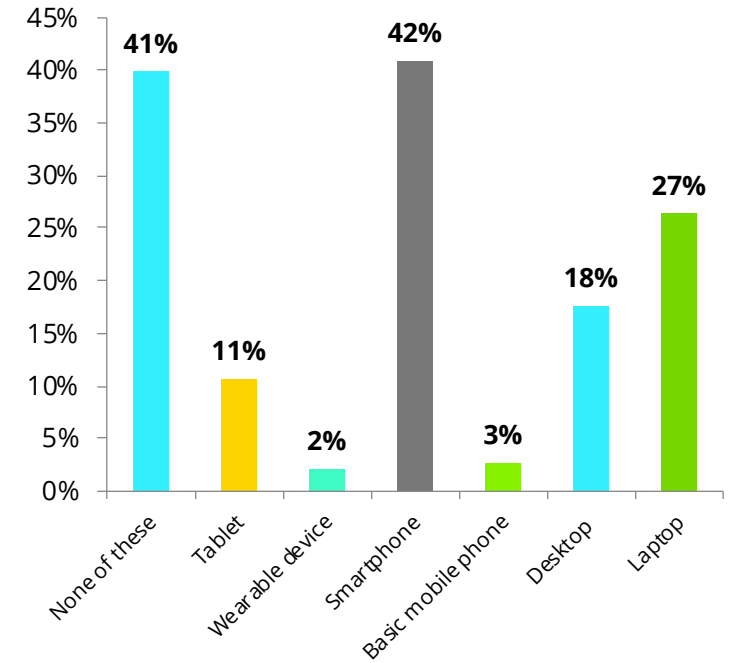
Which of the following *work* devices do you use for work-related tasks?
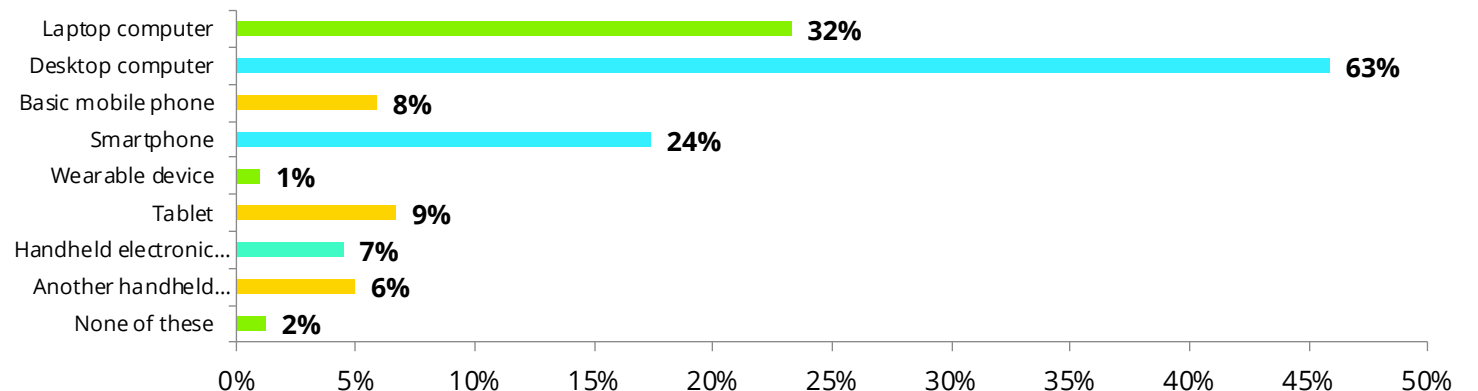
The research shows **mobile has not been fully adopted** in the context of enterprises. **There is a lot of potential to gain.**

Initial key findings

59% of the workforce does not always (/never) work at a fixed location (dedicated desk)

20% is provided with a smartphone. Which is **16%** less the employees provided with a laptop.

27% of employees is _not_ provided with a device at all

40% of the workforce believe that their enterprise can benefit more from mobile technology and want to use more mobile technology.

There are plenty of core enterprise process which lack supporting, mobile tools;
*   **59%** of employees say they cannot complete timesheet information mobile
*   **39%** say they cannot manage holiday requests

More transformational
*   **59%** cannot approve invoices using mobile solutions
*   **53%** say they cannot manage product stock

It's is also about willingness and being able to change; around **40%** of the employees who said tasks can be done using mobile, are currently not using mobile devices for these tasks, just…. because they are just used to do it differently.
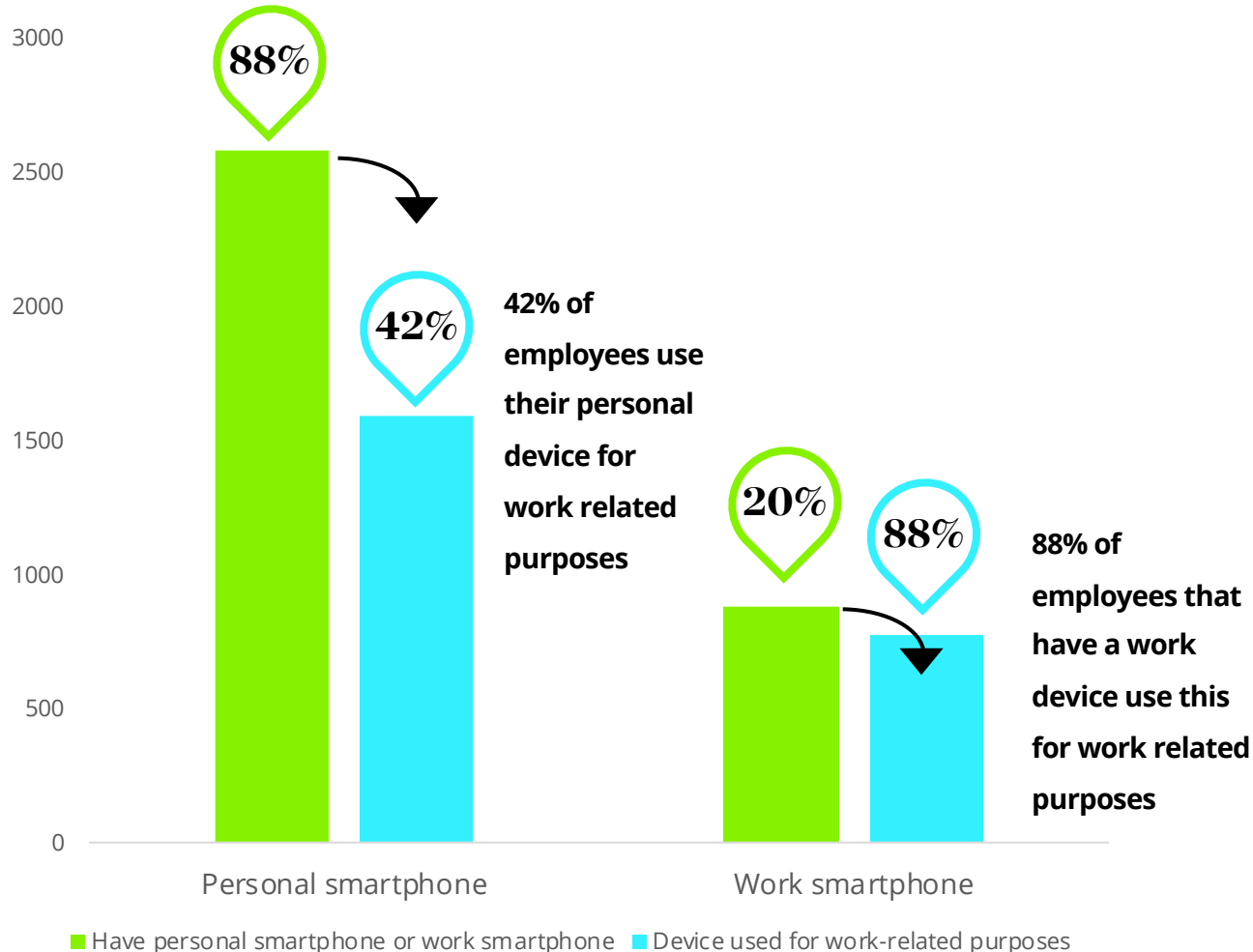
Mobile in the Enterprise

FROM AN EMPLOYEE PERSPECTIVE

Consumerization is taking its toll

88%
42%

42% of employees use their personal device for work related purposes

20%
88%

88% of employees that have a work device use this for work related purposes

3000
2500
2000
1500
1000
500
0

Personal smartphone   Work smartphone

■ Have personal smartphone or work smartphone   ■ Device used for work-related purposes

We live in an age where instant gratification is really normal, where anything we want is available on demand, anytime, anywhere. Our personal lives are transformed by digital technologies and experiences; we expect high quality standards from devices and technology itself, as well as expect rich, digital experiences. These expectations (/behavior) is shifting to our workplaces too, where we expect similar experiences. **However, we see that enterprises are still not, in many case enabling their employees with the right digital tools, let alone offer the same rich experiences employees have in their personal lives.**

88% of employees earn a personal smartphone. 42% of those employees use it for work-related purposes.
Only 20% of the employees receive a smartphone from work. When employees receive a smartphone from work, then work devices are most often used for work-related tasks (88%).

Employees need more from their employer...

Employees are way ahead of adopting technologies in their personal life, in comparison to enterprises. There is still a gap between adoption of technologies at home and at the office; in many cases this gap has become significant. **With that reason, employees expect their employer to step up there game and address the needs and experiences they get when not a work.**

DID YOU KNOW THAT...

36% Only 36% of employees feel their workplace is advanced when it comes to adopting technologies

32% Only 32% of employees feel their workplace is advanced when it comes specifically to adopting *mobile* technologies

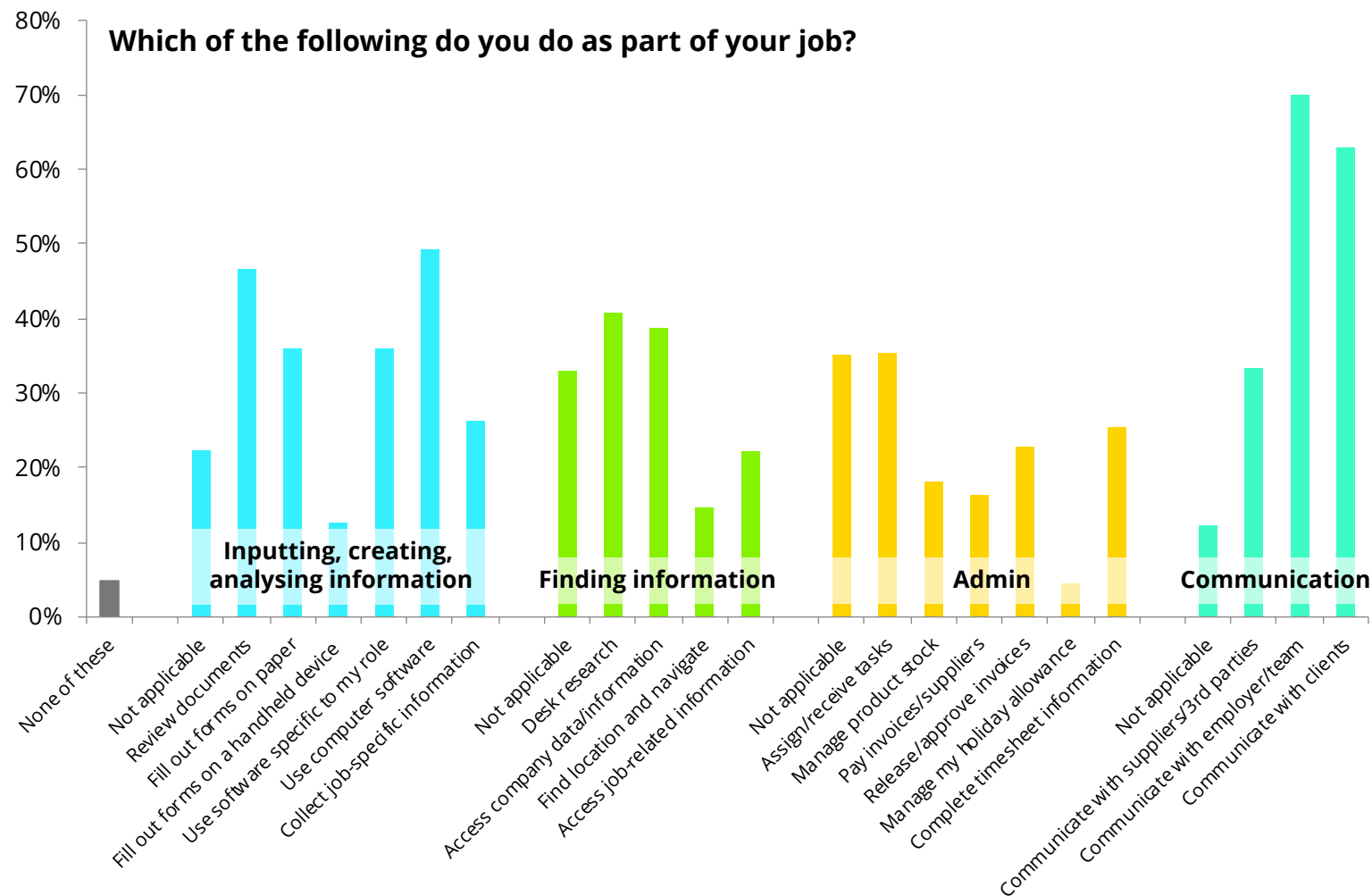**37%** believe that their enterprise can benefit from mobile / technology

40% want to use more mobile / technology at work

38% finds that mobile / technology has a positive effect on their work efficiency

Mobile is used as an enabler to certain tasks

Which of the following do you do as part of your job?

Inputting, creating, analysing information

Finding information

Admin

Communication

Employees indicated that many of the tasks they are performing today can be done using a mobile device. Employees think that mobile can be used for:

- **53%** for communication purposes with employer or team
- **63%** for communication with clients
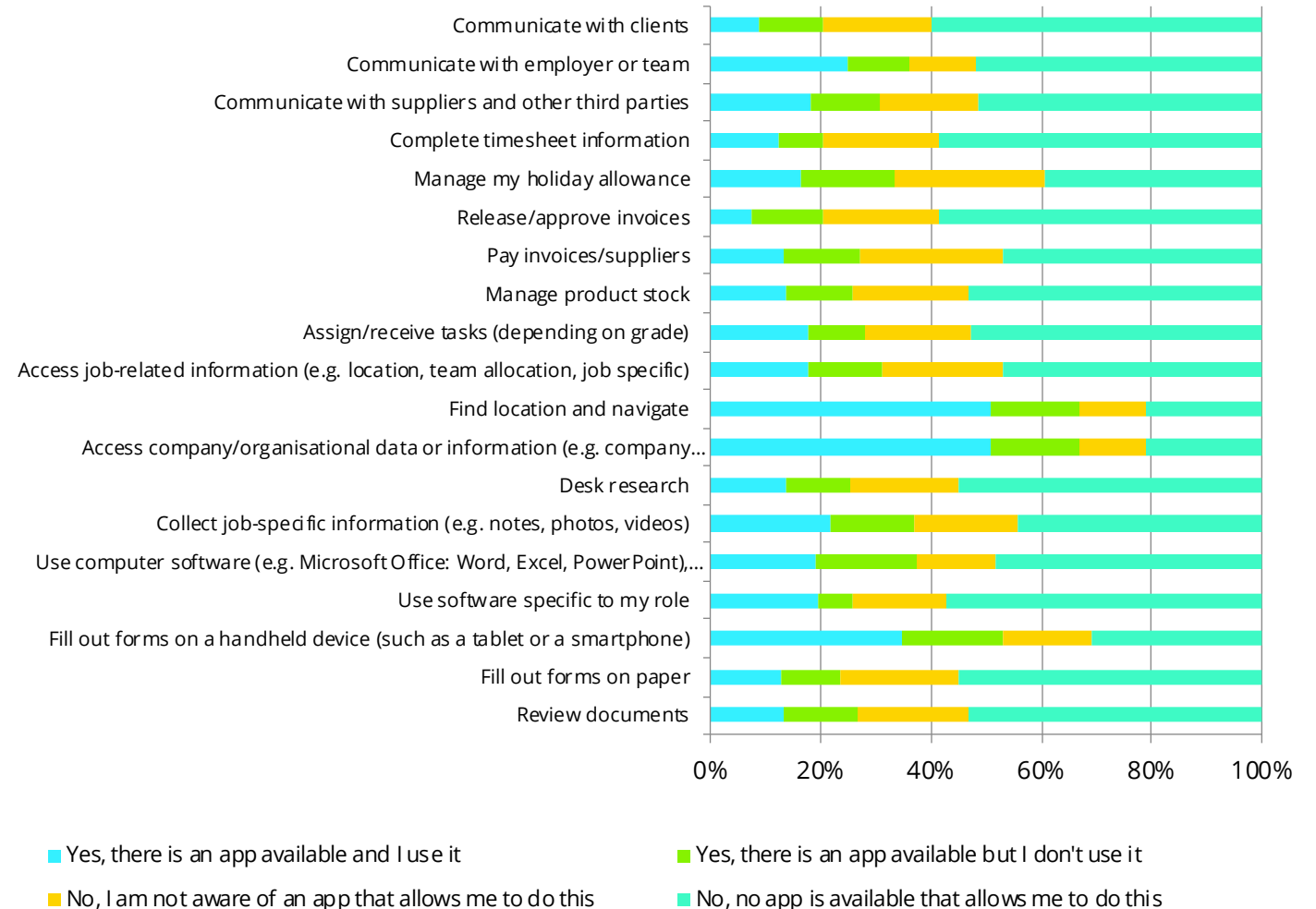- **33%** for communication with suppliers and other third parties

Employees however believe there is much more to go gain

Employees have indicated that mobile has the potential to substantially support specific processes at work. We see however in practice that most employees don't have access to apps that support their processes. Less then half of the employees responded that there are apps available for specific processes. This indicates that enterprises are not meeting the employee demands by offering the right solutions for their employees.

Only 30% of the employee find that they received the right training to enable themselves in making better us of a smartphone or tablet for work related tasks.

49% of employees believe however that smartphones or tablets are easier to use for some tasks than a laptop or desktop.

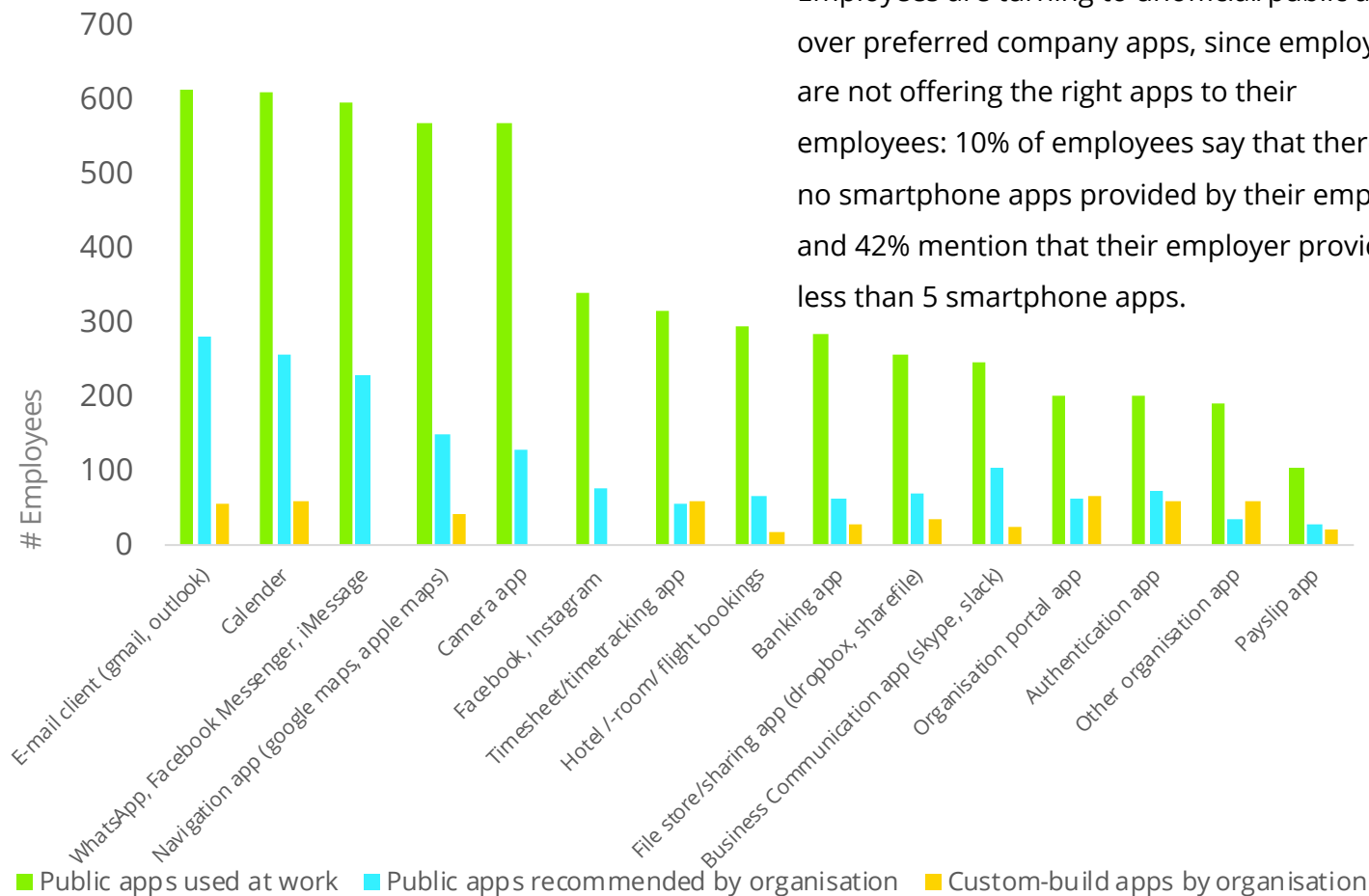## Are there any apps available that can be used for specific processes?

Chart categories (top to bottom):
- Communicate with clients
- Communicate with employer or team
- Communicate with suppliers and other third parties
- Complete timesheet information
- Manage my holiday allowance
- Release/approve invoices
- Pay invoices/suppliers
- Manage product stock
- Assign/receive tasks (depending on grade)
- Access job-related information (e.g. location, team allocation, job specific)
- Find location and navigate
- Access company/organisational data or information (e.g. company…
- Desk research
- Collect job-specific information (e.g. notes, photos, videos)
- Use computer software (e.g. Microsoft Office: Word, Excel, PowerPoint),…
- Use software specific to my role
- Fill out forms on a handheld device (such as a tablet or a smartphone)
- Fill out forms on paper
- Review documents

Axis: 0% 20% 40% 60% 80% 100%

Legend:
- Yes, there is an app available and I use it
- Yes, there is an app available but I don't use it
- No, I am not aware of an app that allows me to do this
- No, no app is available that allows me to do this

Consumer apps are finding there ways into the enterprise

Apps used for work purposes

Employees are turning to unofficial/public apps over preferred company apps, since employers are not offering the right apps to their employees: 10% of employees say that there are no smartphone apps provided by their employer and 42% mention that their employer provided less than 5 smartphone apps.

From the data, we can conclude that the best-known consumer apps are also frequently used by employees. For instance, E-mail is mostly used by employees to communicate with colleagues or clients (67%). Followed by communication apps, such as WhatsApp (72%). and calendar apps, that are frequently used to manage work e-mails and schedules (69%). Additionally, enterprises that don't have any or just a few custom-build apps recommend to there employees to use proven public apps for work related tasks and activities (which shows that enterprises understand the need for using the latest (mobile) technology) .

Chart: # Employees (y-axis, 0–700) by app category

- Public apps used at work
- Public apps recommended by organisation
- Custom-build apps by organisation

Categories (x-axis):
E-mail client (gmail, outlook); Calender; WhatsApp, Facebook Messenger, iMessage; Navigation app (google maps, apple maps); Camera app; Facebook, Instagram; Timesheet/timetracking app; Hotel /-room/ flight bookings; Banking app; File store/sharing app (dropbox, sharefile); Business Communication app (skype, slack); Organisation portal app; Authentication app; Other organisation app; Payslip app
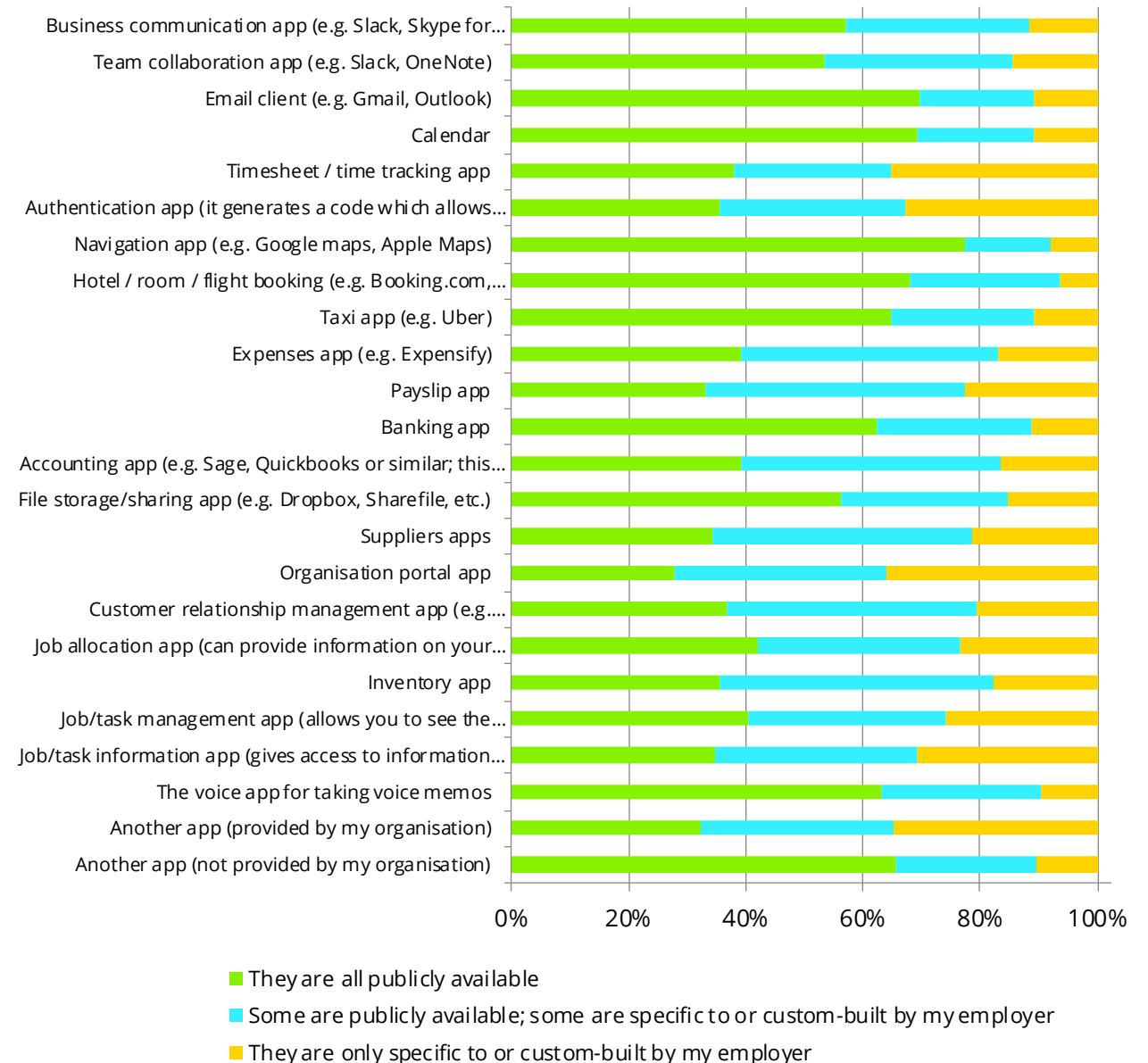
And custom-build apps for some key areas

Enterprises are immature if we look at the custom-build apps that they provide to their employees. A small group of enterprises are actually creating custom-build apps for their employees. If we have a closer look at the custom-build employee apps we can see that most custom-build apps are related to;
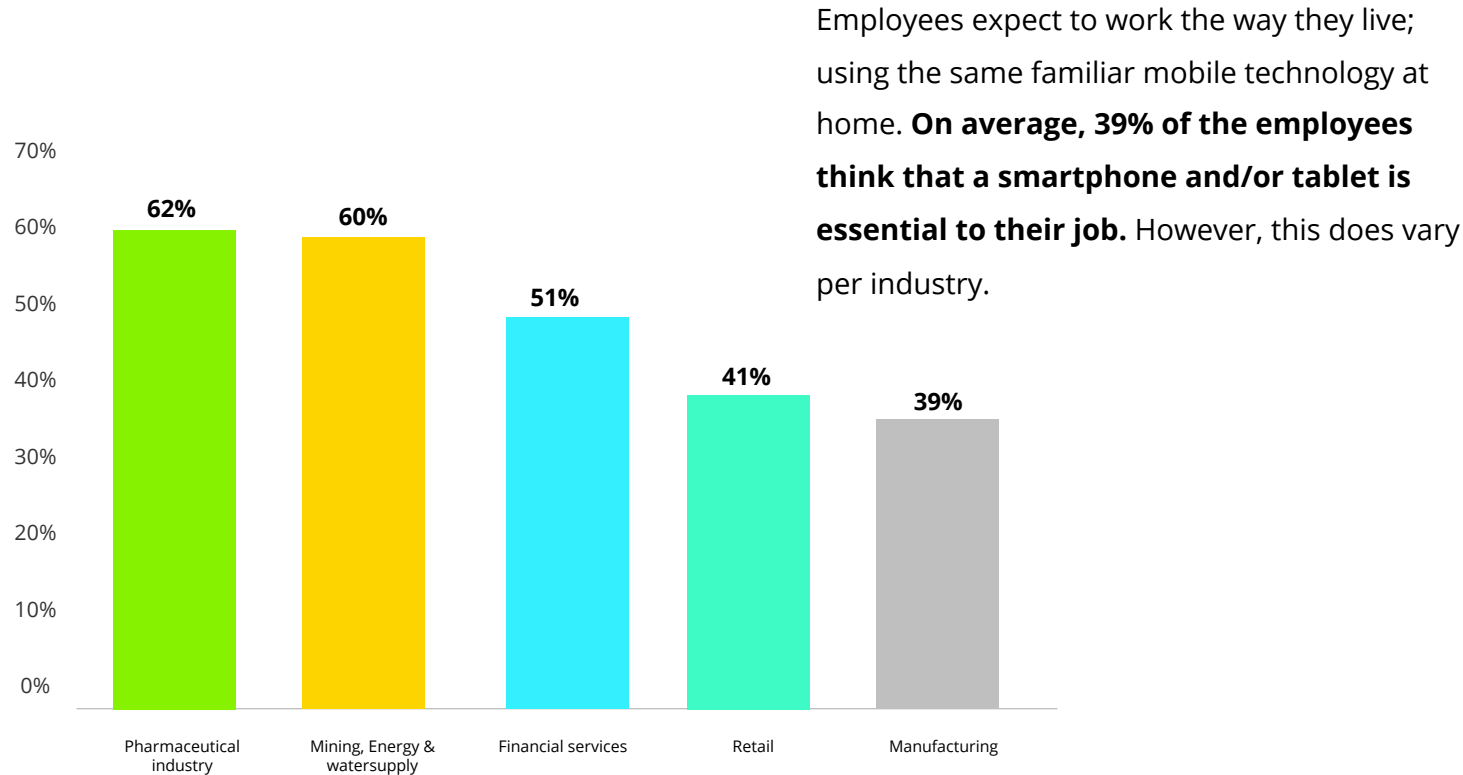
1. Pay slip app (23% is custom-build)
2. Enterprise portal app (36% is custom-build)
3. Timesheet / time tracking app (35% is custom-build)
4. Authentication app (33% is custom-build)
5. CRM app (20% is custom-build)
6. Job allocation (7% is custom-build)
7. Job/task information app (26% is custom-build)

Interestingly, in case an employer does provide (a) custom build app(s) it gets rated really well: almost 77% rate custom build apps with a 7 or higher!

Employees that use a mobile app for work-related task

Chart categories (top to bottom):
- Business communication app (e.g. Slack, Skype for...)
- Team collaboration app (e.g. Slack, OneNote)
- Email client (e.g. Gmail, Outlook)
- Calendar
- Timesheet / time tracking app
- Authentication app (it generates a code which allows...)
- Navigation app (e.g. Google maps, Apple Maps)
- Hotel / room / flight booking (e.g. Booking.com,...
- Taxi app (e.g. Uber)
- Expenses app (e.g. Expensify)
- Payslip app
- Banking app
- Accounting app (e.g. Sage, Quickbooks or similar; this...
- File storage/sharing app (e.g. Dropbox, Sharefile, etc.)
- Suppliers apps
- Organisation portal app
- Customer relationship management app (e.g....
- Job allocation app (can provide information on your...
- Inventory app
- Job/task management app (allows you to see the...
- Job/task information app (gives access to information...
- The voice app for taking voice memos
- Another app (provided by my organisation)
- Another app (not provided by my organisation)

Legend:
- ■ They are all publicly available
- ■ Some are publicly available; some are specific to or custom-built by my employer
- ■ They are only specific to or custom-built by my employer

It's time to work the way we live!

Employees expect to work the way they live; using the same familiar mobile technology at home. **On average, 39% of the employees think that a smartphone and/or tablet is essential to their job.** However, this does vary per industry.

Employees need to be empowered by their organisation with mobile technologies so they can work where, when and how they want. Additionally, providing employees with the right toolset to enable them to do their work better and to be more productive and increase job satisfaction at work.

Additionally, almost 40% of the employees feel they could make better us of a smartphone or tablet for work related tasks. Employees in the Pharmaceutical industry and Mining, Energy & water supply industry are most convinced, respectively 61% and 60%. So, now **it is time to work the way we live!**

Chart: Employees who believe they you could make better use of a smartphone or tablet for work related tasks.

Industry	Percentage
Pharmaceutical industry	62%
Mining, Energy & watersupply	60%
Financial services	51%
Retail	41%
Manufacturing	39%

Employees who believe they you could make better use of a smartphone or tablet for work related tasks.

Mobile in the Enterprise

FROM AN ORGANISATION PERSPECTIVE

It doesn't seem that common to enable the workforce with *a* device

Enterprises are not overly generous when it comes to providing devices to their employees: almost 27% of employees don't get any device of their employer. Only 20% of the employees get a smartphone; for the actual workforce this is **15%**, however if we look at management it is **35%**.

Having no responsibilities for a team and/or process, is a deal breaker for getting a work device from your employer. This actually differs a lot per industry; where Manufacturing & Engineering is clearly ahead of the rest, whereas Human Capital and Transport & Logistics scoring lower.

Did you know that 73% of the employees receive a device of their employer

26%
Get a laptop

48%
Get a desktop

7%
Get a mobile phone

9%
Get a tablet

20%
Get a smartphone

5%
Get a job specific device

.... nor providing the workforce with any work-related apps

12% of employees have no apps for work purposes, provided by their employer

37% of employees that get mobile device have less then 5 apps for work purposes, provided by their employer

Does your employer have its own app store?

72%	no
21%	yes
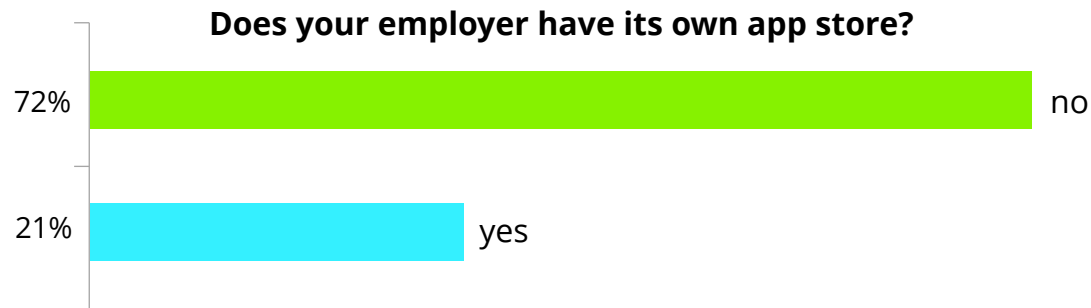
There are a lot of work-related apps out there and available for the employee. **Enterprises are not enabling their employees enough by recommending publicly available apps or providing custom build mobile solutions;** of the employees that have apps available to them. On about half of the mobile devices (smartphone or tablet) provided by employers, less than 5 apps are being installed that are used for work purposes. Also, only few apps used for work purposes have been provided by the employer itself. **Most employees use publicly available apps for work purposes (68%).**

Most apps are actually used with smartphones (68%), showing that there is a need for mobile applications at work; Additionally, we see that the more company apps are available to employees, the more likely a work device is used.

Additionally, the majority of enterprises do not have their own app store (72%), making it difficult for employees to find the relevant work-related apps that are available to them.

Enterprises tend to be flexible

Employees feel that their employer support flexibility in time and location:

55% **of employees that feel their employer supports flexibility in time**

29% **of employees feel that their employer support flexibility in location**

These days, enterprises are supporting flexibility and time and locations. On average 38% feels that their employer support flexibility in time and location; both middle and top management across industries feels most empowered, with a peek in the Technology industry (almost 70%).

Research indicates that top management across industries feel most flexible when it comes to work location independent. Both middle and top management feel most flexible when it comes to working flexible hours. Additionally, a peek for both flexible hours and location exists in the Technology sector (over 70%), whereas logically low scores where identified in the Healthcare industry.

A rising opportunity for enterprises

We see a big gap in mobility maturity between employees and the enterprises they work for. There is a significant opportunity for enterprises to leverage mobile technologies to improve overall performance, in terms of productivity, efficiency and new business models, and also in terms of employee satisfaction and "ownership".

Encouraging flexibility actually means enabling your employee with mobile solutions, which is currently not done enough by employers. Additionally, only 36% of employees believe that their workplace is advanced when it comes to adopting new technologies. Also, 18% don't feel that they have access to the right mobile technology. This is especially the case for the workforce; 70% of the workforce do not feel that they have access to the right mobile technology to enable them in their work.

27.4% employees feel that their workplace is advanced in adopting mobile technology. When we look at the employees that have a smartphone or laptop from work, this is respectively 38,5% and 35%. Overall, we can conclude that young employees believe they are provided with less advanced mobile solutions by their employer than experienced employees.

Finally, there is quite a difference in perception between employees that do or don't have responsibilities for teams and/or processes. Employees that don't have any responsibility, think that their employer lacks behind in adoption of mobile technology.

The opportunity varies per industry and type of work

Enterprise within industries where there are less 'traditional" desk jobs are investing more in mobile technologies than more traditional" desk based" industries.

Industry; Professionals within the C&IP and Energy & Resources industries are most dissatisfied with the adoption of mobile technology (respectively 67,5% and 70,5%). Professionals within the Technology and Financial Services industries are quite positive with the adoption of mobile technology.

Type of work; When we look at the type of work, core business process professionals are least positive about adoption of mobile technologies, compared to employees in facilities or technology.

15% of the professionals that get a mobile device strongly believe that their device is essential to their job. Generally speaking, every employee that is provided with a mobile device strongly believes, well above average, that a mobile device I essential to their job.

Given the level of importance of having a device perceived by employees, the industries that are lacking behind, should strongly consider to change that, given that employees who are given a device clearly see the benefit!

Do you believe that a mobile device is essential to your job?

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
	11%	28%	30%	18%	13%
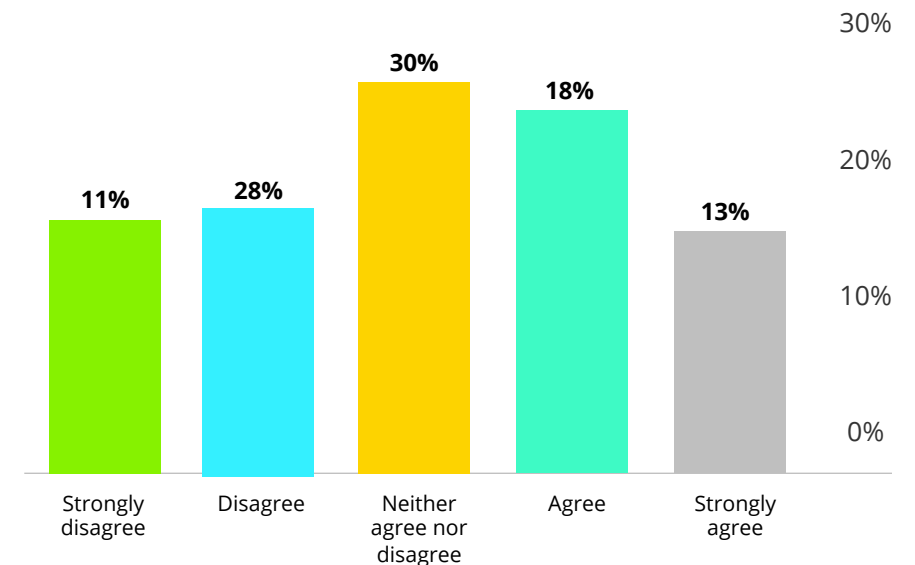
So we can conclude, companies will truly benefit from connecting and empowering their workforce

Mobile needs to be treated seriously like enterprises started to treat desktops and laptops seriously as company assets a long while ago.

As stated before, people (and thus employees) have fallen in love with mobile technology. In fact no age group, job profile nor industry shows other figures; Everybody is really positive about mobile and clearly see the benefit of using mobile technology for work;
Why not piggyback on that embracement of technology and gain the benefits like those who have already empowered their employees.

So – now what are you waiting for…

53% of the employees say (mobile) technology has made **collaboration with colleagues (a lot) easier**

67% of the employees say (mobile) technology has made **quick & easy access to information (a lot) easier**

51% of the employees say (mobile) technology has made **working more flexible (a lot) easier**

Final remarks

And our Point-of-View on Mobile in the Enterprise

Employees have embraced mobile technology, you should as well

There is clearly a opportunity for enterprises to leverage mobile technologies to improve performance (in the broadest sense). There is an obvious need/demand from employees to get enabled and empowered with mobile devices & solutions.

Obviously, there are frontrunners, across industries, and laggards. Not only in terms of providing devices, but also in terms of providing the best solutions for employees. Additionally, it's not just about devices and solutions, but also training, onboarding, app stores, etc. For many, there is a lot to improve, but don't panic. Your absolutely not too late!

We have seen enterprises taking mobile in the enterprise very serious, creating all sorts of benefits from various angles. It starts with listening to your employees and taking them serious. Not just because they are experienced in using mobile devices & solutions (consumerization) but also because *they see* the opportunity of improving the business through the usages of mobile technology. **So once more, why wait...?**

Enterprise Mobility drives value creation

Enterprise Mobility has moved beyond the classic drivers of increasing productivity and efficiency. Mobile technology is evolved and still evolving resulting in better defined and more diverse use cases. This allows mobile to provide ample opportunities and impact business processes across the value chain making it a force of digital transformation.

Enable connecting employees

Focus on processes where employees often communicate or have a specific need for information (from each other). These key communication streams should allow for better collaboration, with an increase in quality, employee morale and satisfaction as key results

Expand the value of technology investments

The value of technology investments can be expanded by enabling usage of such technologies for your employees through mobile. This applies to classical technologies, such as ERP systems as to recent technologies like, artificial intelligence and big data

Enable new business

Outperform your competition by using the capabilities of your workforce to expand the current business. Mobile can enable you, though it's specific assets, to create new value propositions, perform additional activities and approach more client segments

Disrupt the competition by enabling innovation

Innovation is nowadays key for the success of your company. Mobile is in many cases an enabler for innovation and disruption; It will help you to transform your business and stay relevant in the marketplace

More business with current capacity

Mobile has the ability to simplify processes enabling employees to focus on the activities that create value for the organization. Therefore, organizations are able to do more with the same capacity, increasing the value delivered per employee

6 principles to start your Enterprise Mobility journey

1

Start small – think big

Use agile development to keep ambitious projects manageable. Building towards a fully-functional product one user-story and pilot at the time allows for quick iteration and the ability to incorporate new insights. Always keep an eye on your end-goal.

2

The user in the spotlight

Ensure the user experience for critical enterprise apps is as good as that for consumer apps to encourage adoption, usage and user satisfaction. Additionally, involve the end-user in the overall delivery process.

3

Lay a mobile foundation

Make mobile part of your (innovation) strategy. Enterprise mobility requires a different mindset and distinct capabilities. Lay a (technical) foundation for mobile to evolve.

4

Focus on vertical processes

Prioritize the mobilization of processes that benefit the most such as on-location services. Also consider vertical processes first before moving on to horizontal processes.

5

Get the required capabilities

Implementing and embedding mobile into your organisation requires specific capabilities. Add these capabilities to your organization to ensure effectiveness and drive value creation.

6

Don't forget security

The adoption of mobile in the enterprise means an expansion of the enterprise network. The enterprise needs to be aware of the security implications of mobile adoption and act accordingly.

It's time to work the way we live.

Apple Alliance Germany

enterprisenext@deloitte.de

Deloitte.
Digital