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 on, 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.
Content

- Mobile Employee Survey: a study on the German market
- Current state of Mobile in the Enterprise
- Mobile in the Enterprise: from an employee perspective
- Mobile in the Enterprise: from an enterprise perspective
- Final remarks
Mobile Employee Survey
A STUDY ON THE GERMAN MARKET
Mobile is starting to enter the enterprise...

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?
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.
Additional characteristics of the research group

<table>
<thead>
<tr>
<th>Education</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>PhD / Doctorate</td>
<td>33</td>
</tr>
<tr>
<td>University / College (Diploma)</td>
<td>260</td>
</tr>
<tr>
<td>University / College (Master)</td>
<td>108</td>
</tr>
<tr>
<td>University / College (Bachelor)</td>
<td>108</td>
</tr>
<tr>
<td>University of Applied Sciences (Master)</td>
<td>36</td>
</tr>
<tr>
<td>University of Applied Sciences (Bachelor)</td>
<td>96</td>
</tr>
<tr>
<td>Completed vocational training</td>
<td>669</td>
</tr>
<tr>
<td>Grammar school / High school</td>
<td>260</td>
</tr>
<tr>
<td>Higher secondary school</td>
<td>365</td>
</tr>
<tr>
<td>Primary school</td>
<td>66</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sector</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Profit sector</td>
<td>121</td>
</tr>
<tr>
<td>Public sector</td>
<td>512</td>
</tr>
<tr>
<td>Private sector</td>
<td>1375</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not specified</td>
<td>10</td>
</tr>
<tr>
<td>Temporary or short term worker</td>
<td>13</td>
</tr>
<tr>
<td>Self-employed</td>
<td>124</td>
</tr>
<tr>
<td>Full time employment</td>
<td>1889</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of function of respondents</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young professional</td>
<td>179</td>
</tr>
<tr>
<td>Other</td>
<td>109</td>
</tr>
<tr>
<td>CEO</td>
<td>72</td>
</tr>
<tr>
<td>Student / intern</td>
<td>64</td>
</tr>
<tr>
<td>Director</td>
<td>37</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of industry of respondents</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Police / fire department</td>
<td>2</td>
</tr>
<tr>
<td>Administration / support services</td>
<td>20</td>
</tr>
<tr>
<td>Legislation and regulation</td>
<td>21</td>
</tr>
<tr>
<td>Mining, Energy &amp; water supply</td>
<td>22</td>
</tr>
<tr>
<td>Marketing / Advertisement</td>
<td>25</td>
</tr>
<tr>
<td>Education</td>
<td>26</td>
</tr>
<tr>
<td>Pharmaceutical industry</td>
<td>37</td>
</tr>
<tr>
<td>Engineering</td>
<td>41</td>
</tr>
<tr>
<td>Hotels / entertainment</td>
<td>48</td>
</tr>
<tr>
<td>Wholesale supply</td>
<td>51</td>
</tr>
<tr>
<td>Construction</td>
<td>70</td>
</tr>
<tr>
<td>Transport / logistics</td>
<td>91</td>
</tr>
<tr>
<td>Healthcare / social work</td>
<td>97</td>
</tr>
<tr>
<td>Financial services</td>
<td>106</td>
</tr>
<tr>
<td>Professional services</td>
<td>119</td>
</tr>
<tr>
<td>IT / communication</td>
<td>127</td>
</tr>
<tr>
<td>Retail</td>
<td>138</td>
</tr>
<tr>
<td>Other</td>
<td>158</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>169</td>
</tr>
</tbody>
</table>

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 enable them to do their work more efficiently 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?

- Laptop: 41%
- Desktop: 11%
- Basic mobile phone: 2%
- Smartphone: 42%
- Wearable device: 3%
- Tablet: 18%
- None of these: 32%

Which of the following work devices do you use for work-related tasks?

- Laptop computer: 32%
- Desktop computer: 63%
- Basic mobile phone: 8%
- Smartphone: 24%
- Wearable device: 1%
- Tablet: 9%
- Handheld electronic: 7%
- Another handheld: 6%
- None of these: 2%
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
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 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 their game and address the needs and experiences they get when not at work.

DID YOU KNOW THAT...

- Only 36% of employees feel their workplace is advanced when it comes to adopting technologies.
- Only 32% of employees feel their workplace is advanced when it comes specifically to adopting mobile technologies.
- 40% want to use more mobile / technology at work.
- 37% believe that their enterprise can benefit from mobile / technology.
- 38% finds that mobile / technology has a positive effect on their work efficiency.
- 36% feel their workplace is advanced when it comes to adopting technologies.

32%
Communication is used as an enabler to certain tasks

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

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.
Consumer apps are finding their 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 their 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).
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!
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 use 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!

**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
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.

- 12% of employees have no apps for work purposes, provided by their employer.
- 37% of employees that get mobile device have less than 5 apps for work purposes, provided by their employer.

Does your employer have its own app store?
- 72% no
- 21% yes
Enterprises tend to be flexible

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

- 55% of employees feel that their employer supports flexibility in time
- 29% of employees feel that their employer supports 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 is 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?

<table>
<thead>
<tr>
<th>Strongly disagree</th>
<th>Disagree</th>
<th>Neither agree nor disagree</th>
<th>Agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
<td>28%</td>
<td>30%</td>
<td>18%</td>
<td>13%</td>
</tr>
</tbody>
</table>

30%  20%  10%  0%
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

This publication contains general information only, and none of the member firms of Deloitte Touche Tohmatsu Limited, its member firms, or their related entities (collective, the “Deloitte Network”) is, by means of this publication, rendering professional advice or services. Before making any decision or taking any action that may affect your business, you should consult a qualified professional adviser. No entity in the Deloitte Network shall be responsible for any loss whatsoever sustained by any person who relies on this publication.

As used in this document, “Deloitte” means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see www.deloitte.com/us/about for a detailed description of the legal structure of Deloitte USA LLP, Deloitte LLP and their respective subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

Copyright © 2019 Deloitte Development LLC.
All rights reserved. Member of Deloitte Touche Tohmatsu Limited