

July 2023

Mobile Employee Survey

An insightful behind-the-scenes look at the German market to guide you in all things mobile

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Exciting things you'll find out

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The world is changing.

We are transitioning from the industrial and information age to the people age, where employee wellbeing and experience are key.

A renaissance, if you will: and that's actually great.





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To: You

Now

You don't have to be a scientist to understand this change: we are fighting for talent, work models are not what they used to be, technology is everywhere and then there's **consumerization**.

In 2019 we surveyed German employees about mobile use in the enterprise to find out: What is the state of the German market when it comes to device distribution and access to the right apps for work? Do certain devices or apps help employees become more productive and flexible?

In 2022 we conducted a second study to follow up on our initial findings. What has changed/evolved/improved in the last four years? Which trends are emerging? Which industries already leverage the power of mobile and where can we support improvement?

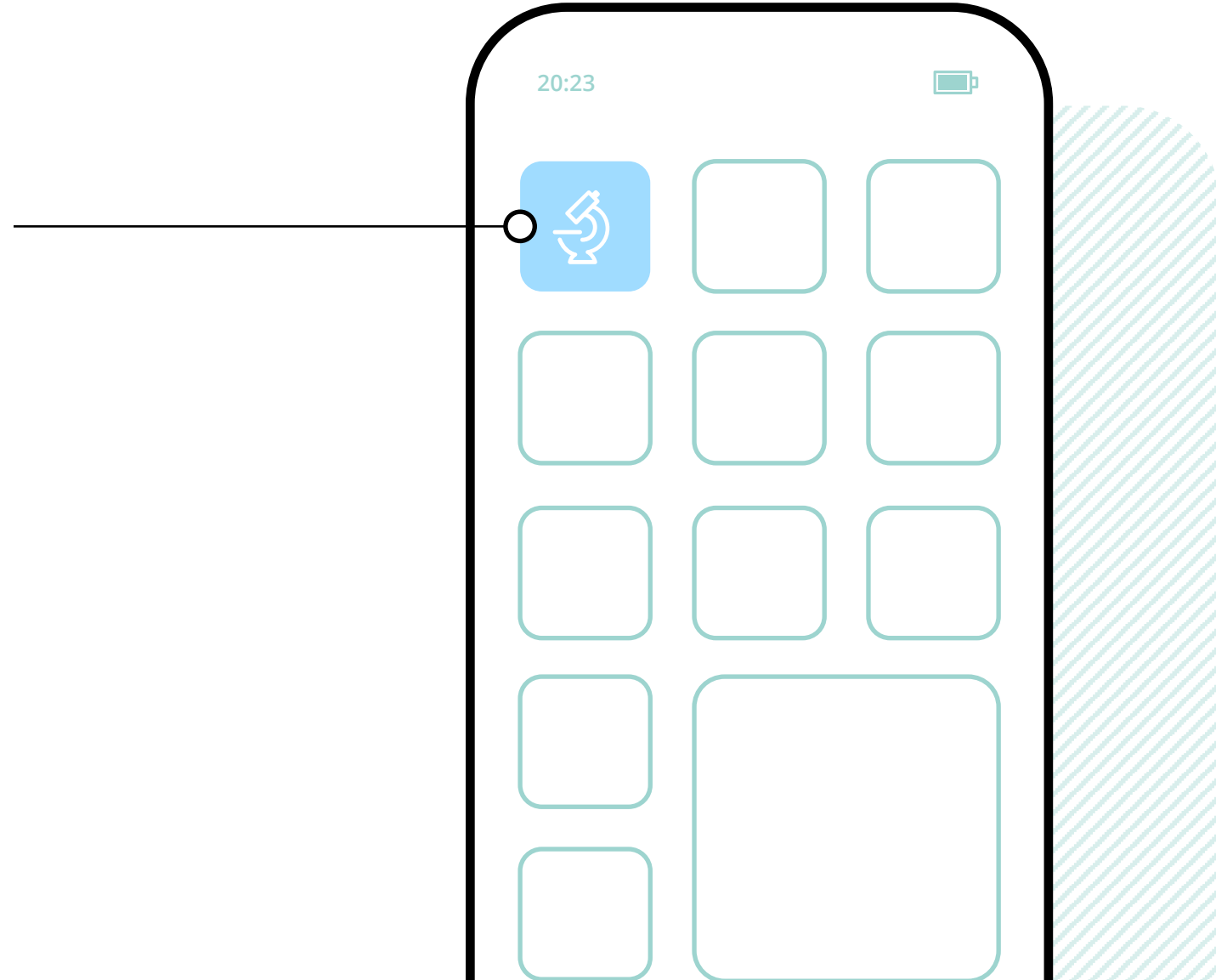
We are sure these results will give you some clear and useful guidance for your own business. We are more than happy to talk you through the findings, and we can even pay extra attention to your specific industry. Happy reading!



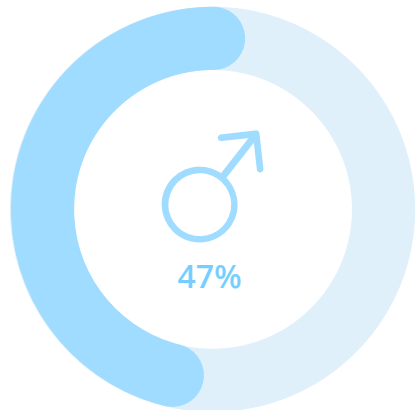
01

RESEARCH & DEMOGRAPHICS

Mobile Employee Survey



Before we dive in, here are the basics of our (very thorough) research



FOCUS OF THE STUDY

The Mobile Employee Survey 2023 is a follow-up study to the Mobile Employee Survey 2019. It provides insight on the workforce in Germany, focusing on how they currently use technology and the opportunities that mobile devices present for enterprises.

CONDUCT OF THE STUDY

A quantitative online survey was conducted in May, 2022 by YouGov on behalf of Deloitte. Deloitte analyzed and interpreted the data based on its key findings, drawing comparison to the study from 2019 to identify changes over the last 4 years.

RESEARCH GROUP 2022

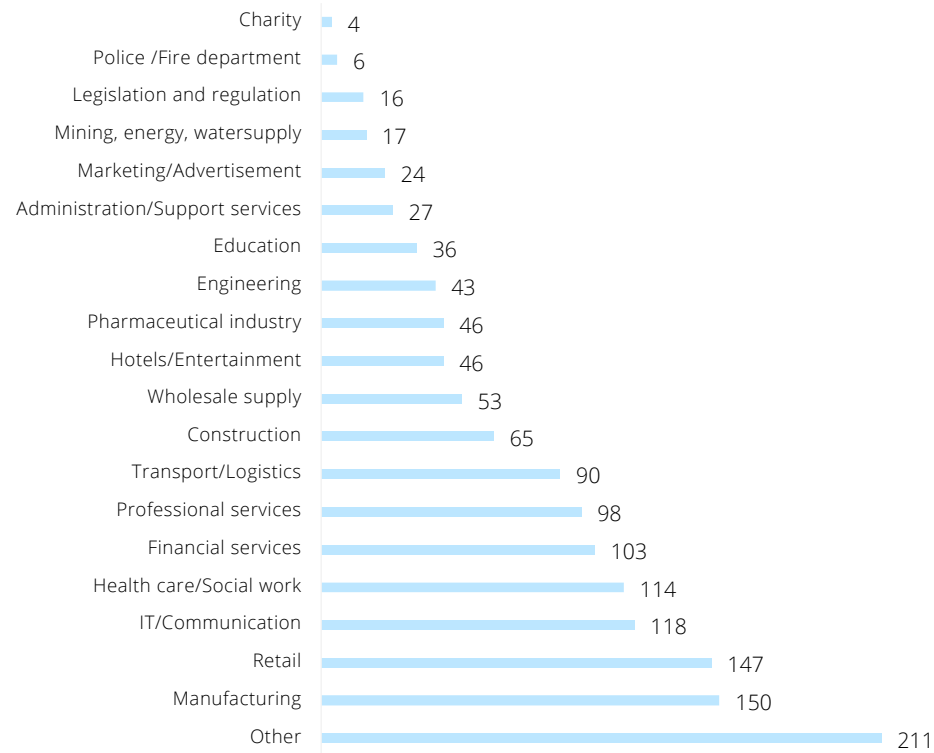
2,039 working adults were interviewed. In order to establish a representative cross-section of the German workforce, we determined several requirements to make sure that the ratios on gender, age, sector, industry, and region were equally distributed.

RESEARCH GROUP 2019

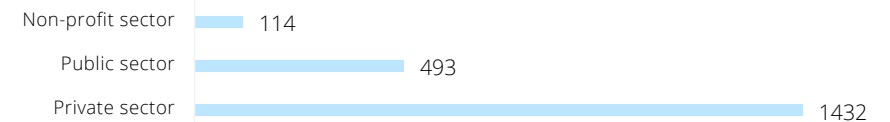
In comparison: The study from 2019 used a panel of 2,008 working adults of with similar distributions regarding age, sector, industry and region. In both studies 53 percent are male and 47% are female with a diverse age group starting from 18 years old.

Work characteristics of our research group 2022

Industry



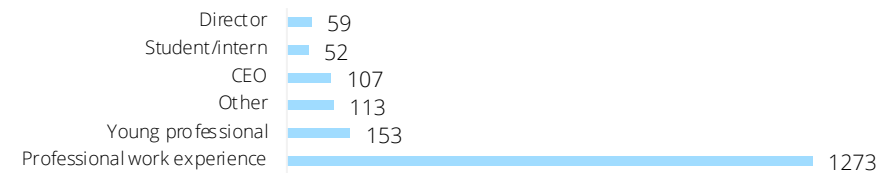
Sector



Employment



Position

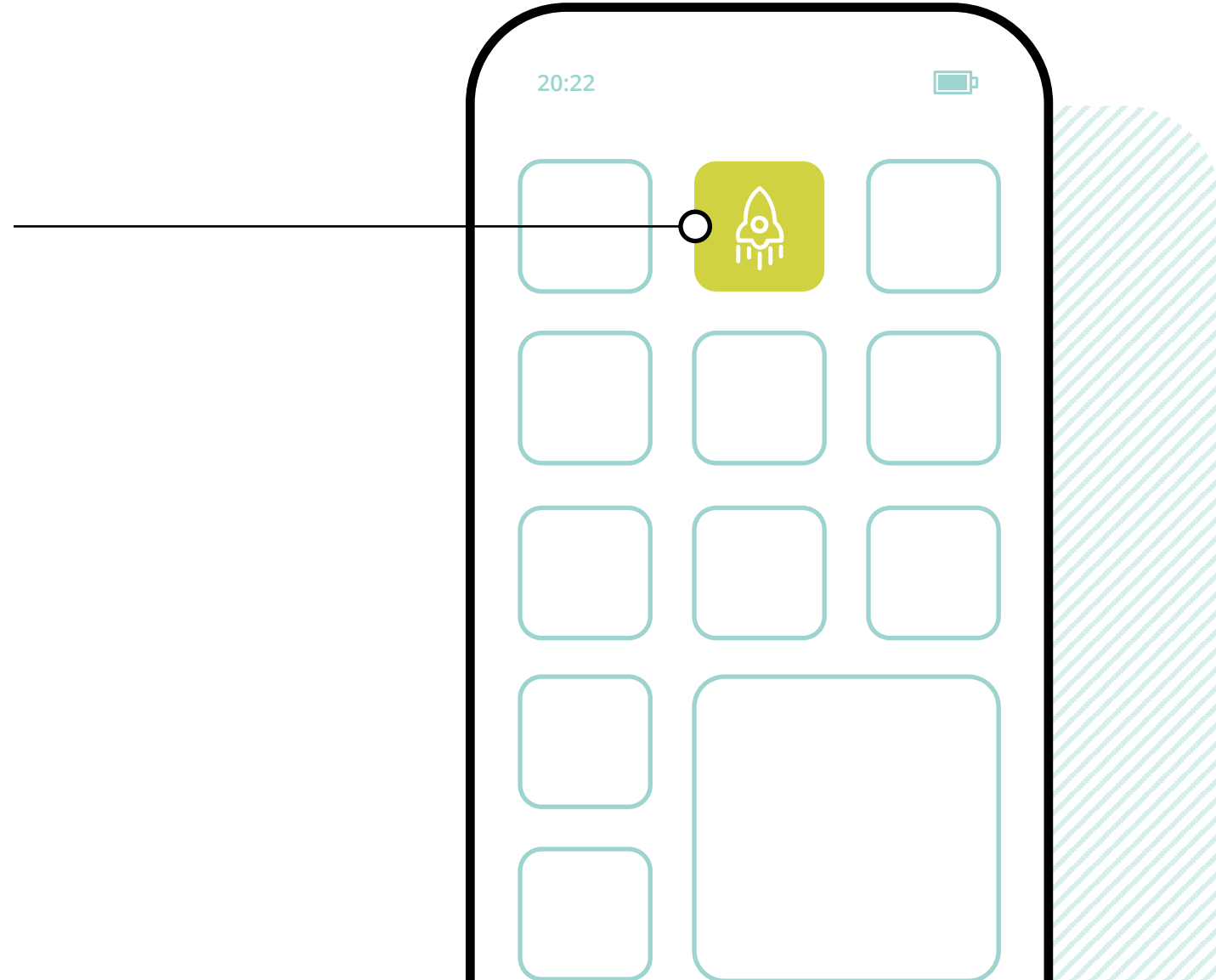


Additional demographics that were surveyed were among others: education, age, gender, branch, net income, marital status, federal states

02

CORE FINDING & TRENDS

2019 / 2022 Comparison




Update 2023

While (unsurprisingly) research shows that mobile technology is a big success factor for enterprises, it will eventually be bigger. Maybe even a bit bigger than that.

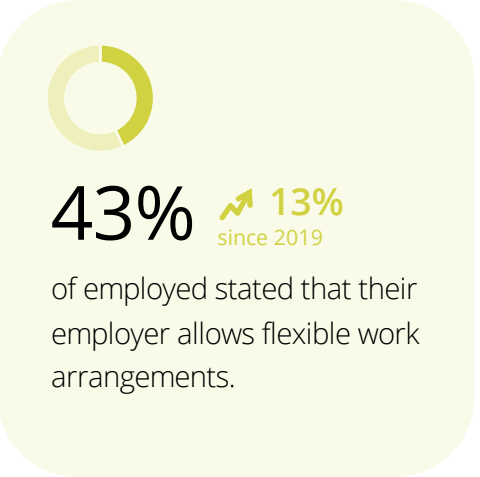
[Tell me more](#)

Mobile in the workplace has come a long way in the last 4 years* ...

* 28 years in dog years, probably one hundred times more in technology years

 MESSAGE now

Enterprises invest more in mobile: The laptop has replaced the computer as distributed device #1.



... but why stop now when there's more to do.



29%

of employees are still not provided with any device for work related purposes.



42%

of employees that use apps for work related purposes are provided with less than 5 apps by their employer.



39%

of the workforce still believe that their enterprise can benefit more from mobile technology.



48%

of employees do not believe that their employer supports them optimally with the necessary hardware in a new hybrid-mobile working world.



66%

of employees say their company has no enterprise app store. Of those that have access, only 10% use it on a regular basis.



MESSAGE

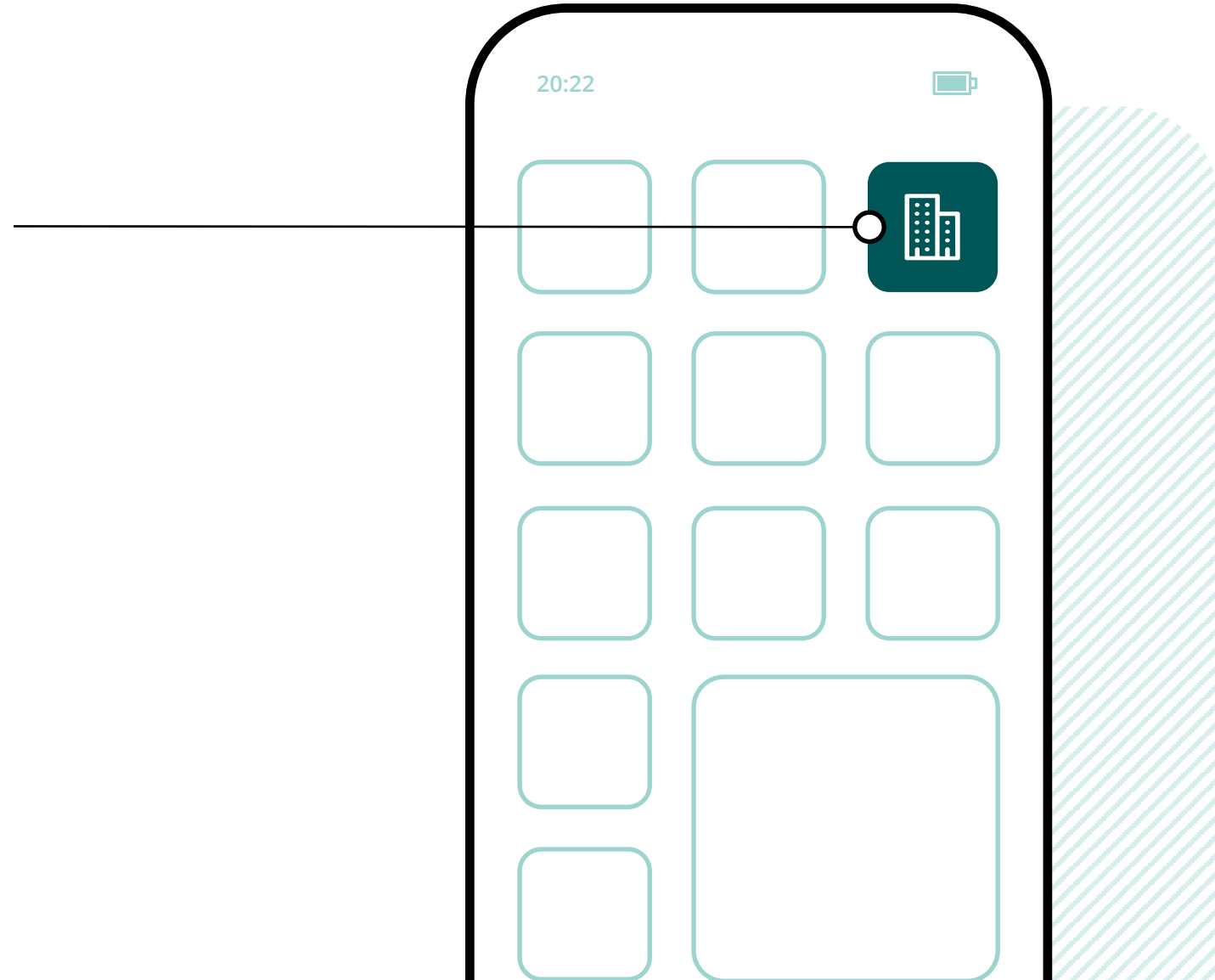
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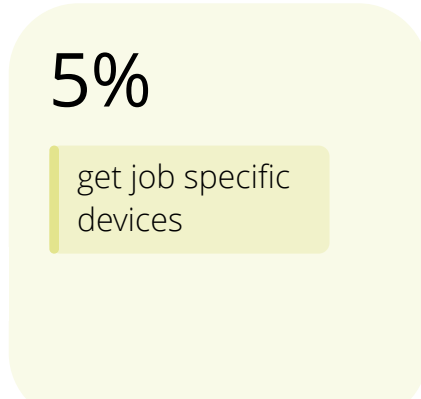
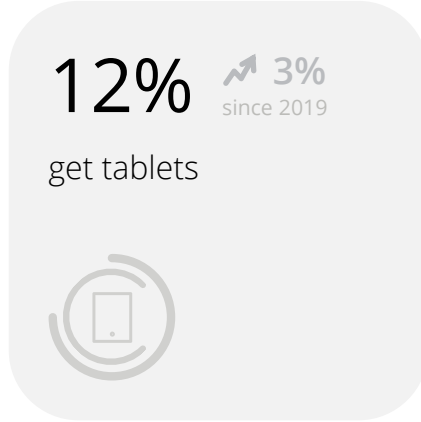
59% of employees who are not provided with work devices use personal devices for work related tasks, leading to compliance and security risks.

03

MOBILE IN THE ENTERPRISE

The enterprise perspective





Enterprises have caught on to the good things that come with successfully integrating mobile into the workplace

36% of the employees surveyed are provided with laptops (10% more than in 2019) and 26% are provided with smartphones (6% more than in 2019).

The change from stationary to mobile devices is especially recognizable in the public sector. Here, desktop distribution has gone down by 23% in 2022, while the distribution of laptops has increased by 14% and the distribution of smartphones by 10%.

*Nice!

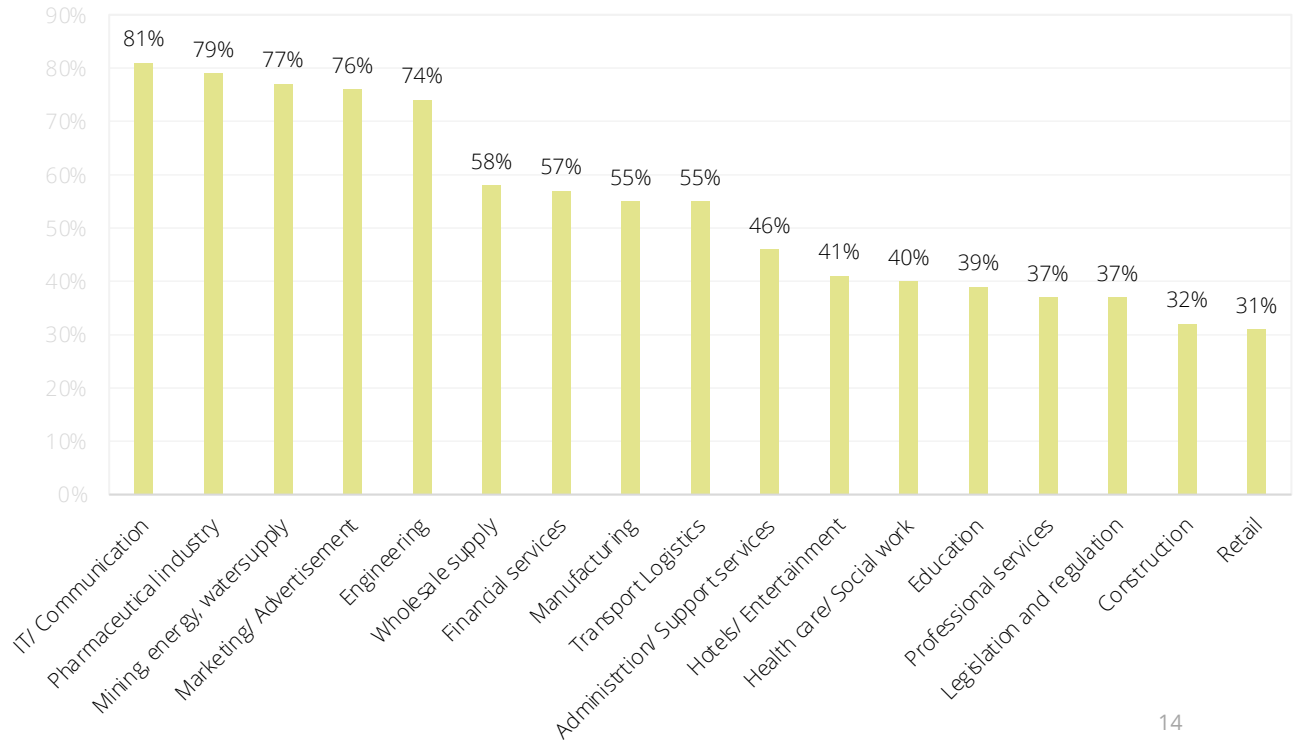
But just like in real life, there are leaders and there are followers

Though the distribution of mobile devices has increased in the last years, some industries are still reluctant to adopt them. Especially industries such as retail, construction and legislation & regulation are still slow to adopt mobile devices with a distribution rate below 40%. Hey, call us, let's talk about it.

 MESSAGE now


While the adoption of mobile devices is progressing, enterprises within industries that have less traditional desk jobs are investing more in mobile technologies than more traditional, desk-based industries.

Mobile device distribution 2022 across industries



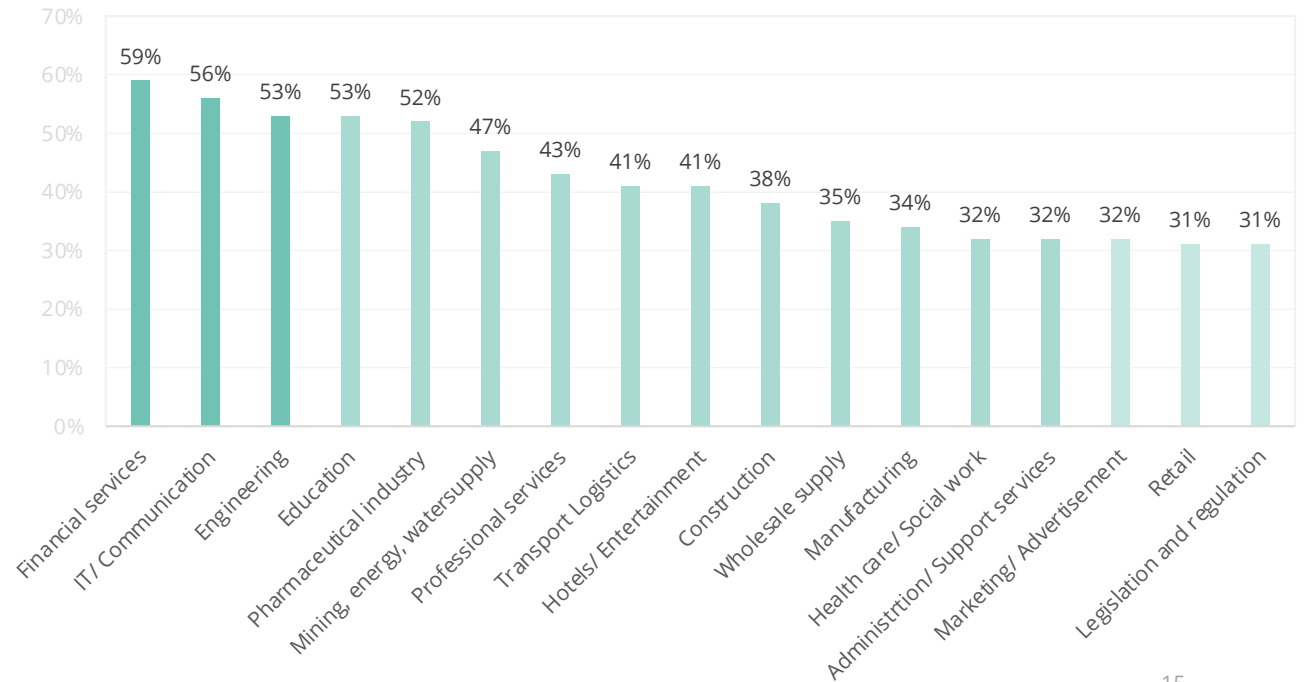
Mobile readiness strongly varies by industry and type of work

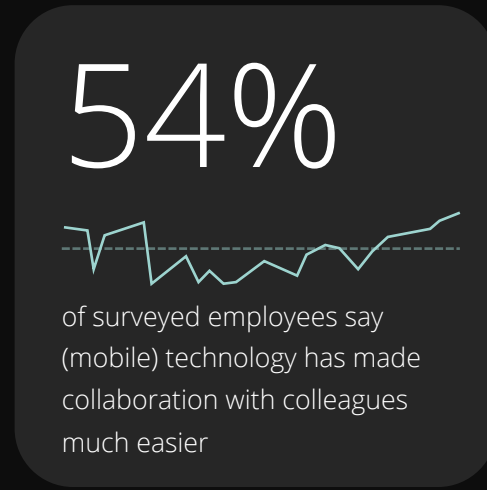
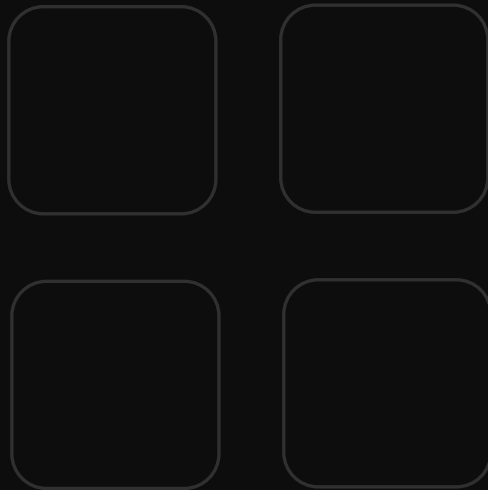
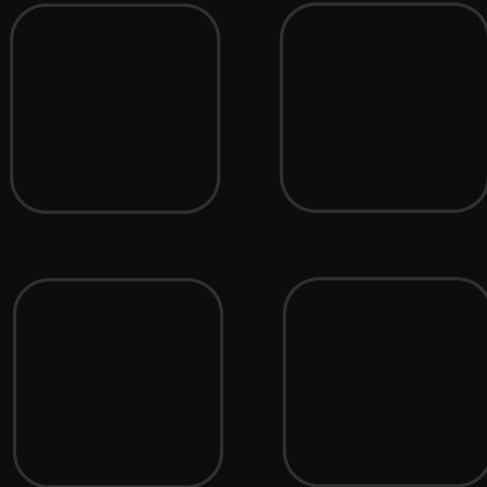
While employees believe mobile device integration has improved, **only 36% of them believe that their industry is very advanced in the use of mobile technology.** In legislation and registration this number is lowest with 31% agreeing and 50% disagreeing to their industry being very advanced. Employee satisfaction about mobile device integration strongly correlates with mobile device distribution.

 MESSAGE now

50 percent of the professionals that receive a mobile device believe that it is absolutely crucial to do their job. 10% more than in 2019.

Employees who believe that their industry is very advanced in the use of mobile technologies 2022 (look at Financial services go!)





Enterprises are opting for more flexible working models, making employees everywhere very happy

The research indicates that flexibility in terms of work location has increased by 14 percent over the last 4 years. You thought it would be more, didn't you...

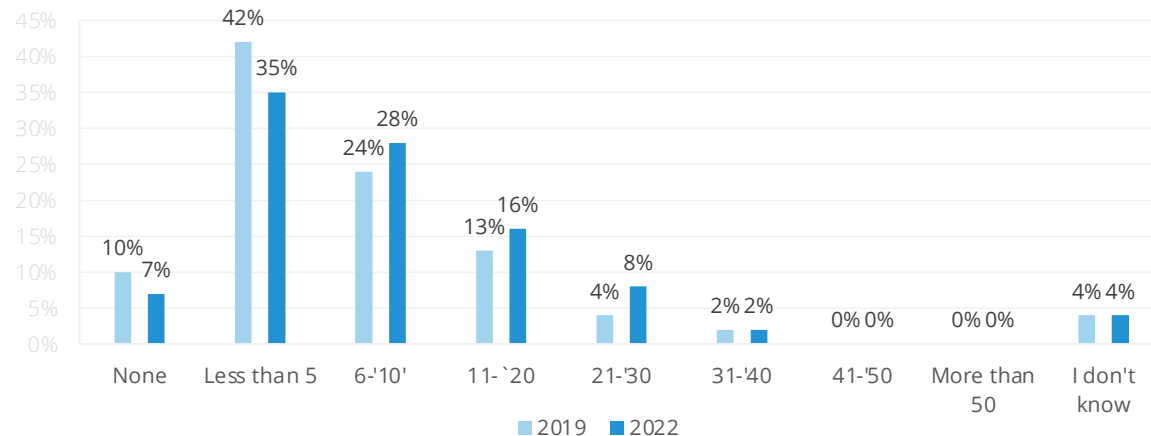
This increase is likely due to the Corona pandemic and the need for remote work to contain the spread. In the long term, this trend is expected to continue - especially in industries, where on-site work is not necessary and processes can be digitalized. In the technology and finance industry already 70% of employees state that they can work from home or elsewhere.

54 percent of employees feel that their employer supports flexibility in scheduling with almost no change (-1%) to 2019. Both middle and top management across industries feels most empowered, with a peak in the technology industry (almost 75 percent).

... but you can't successfully work mobile without mobile tools, aka sufficient work-related apps

There are a lot of work-related apps on the market for employees, yet enterprises are still not sufficiently enabling their workforce by recommending publicly available apps or providing custom-built mobile solutions in 2022. While there is a subtle increase in workers that use apps for work purposes provided by their employer, the overall numbers are low.

Number of apps for work purposes that have been provided by the employee



^
✕

MESSAGE
now

75%

of employees rank employer-provided apps a 7 or higher (out of 10).

MESSAGE
now

66%

of employees that are equipped with a smartphone have no access to an enterprise app store.

MESSAGE
now

35%

of employees that are equipped with a smartphone still have less than five employer-provided apps for work purposes.



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Today, 20:22

It's easy to see that companies can truly benefit from empowering their workforce, and "just enough" is not good enough

Employees have fallen in love with mobile technology and its benefits. In fact, no age group, job profile, or industry shows otherwise. Nearly everyone views mobile positively and clearly sees the benefit of using mobile technology for work.

Why not piggyback on the public's enthusiasm for embracing technology to gain more benefits – just like those who have already empowered their employees?

66% of surveyed employees say (mobile) technology has made access to information much faster and easier

56% of surveyed employees say (mobile) technology has made collaboration with colleagues much easier

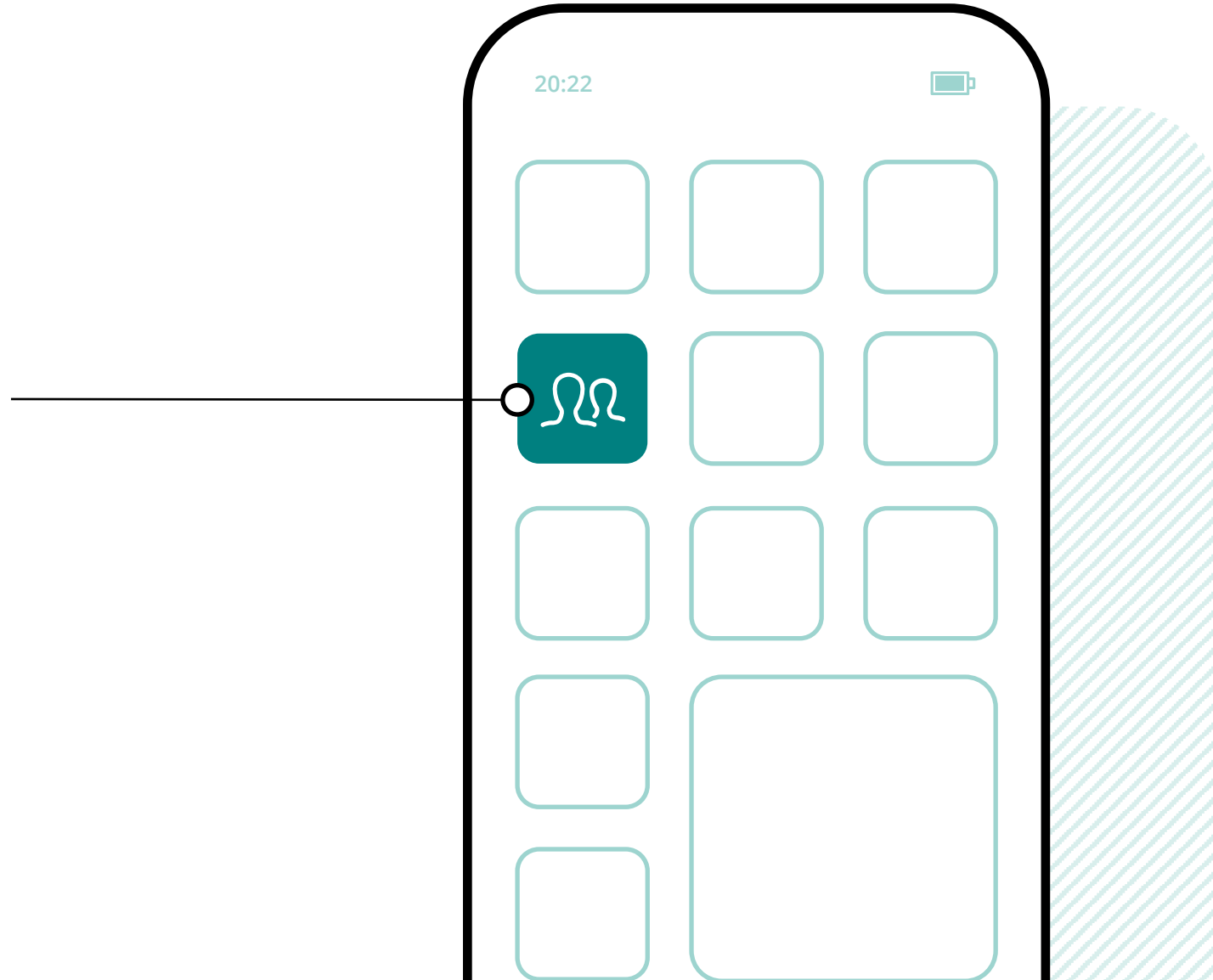
56% of surveyed employees say (mobile) technology has made working much more flexible



04

MOBILE IN THE ENTERPRISE

The employee perspective

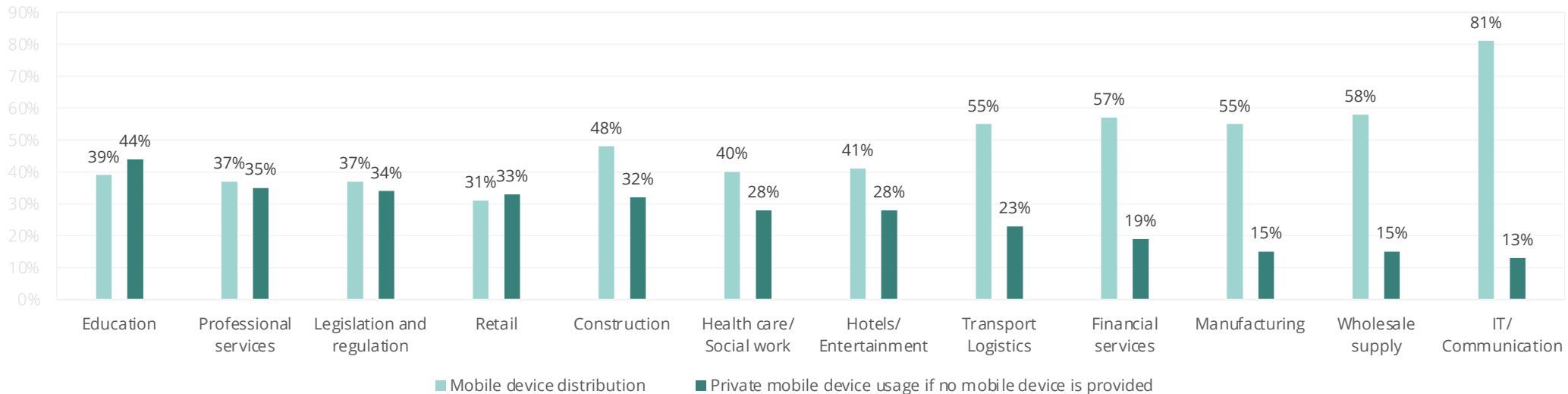


Just a quick reality check: employees use private devices if they are not equipped by their enterprises

In 2022 almost every employee uses a digital device for work related purposes. **If workers are not provided with work related devices, they tend to use their private devices instead.** This is especially noticeable in industries like education in which 44% of employees that are not provided with a mobile work device (61%) use a private mobile device instead.


The frequent use of personal devices for work purposes 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 enterprise.**

Usage of private mobile devices if no mobile device is distributed.





Life and work have blurry lines, so employees need more from their employer


Employees are adopting new technologies much faster in their personal lives than enterprises are in the workplace. And in many cases, this gap has become significant. **As a result, employees expect their employer to step up their game and match the experiences they get outside of the workplace.**

 MESSAGE now


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

48% of employees do not believe that their employer supports them optimally with the necessary hardware in a new hybrid-mobile working world


 

 MESSAGE now

40%
want to use more mobile/technology at work

 MESSAGE now

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

 MESSAGE now

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

You can make it easier for them and more efficient for your company

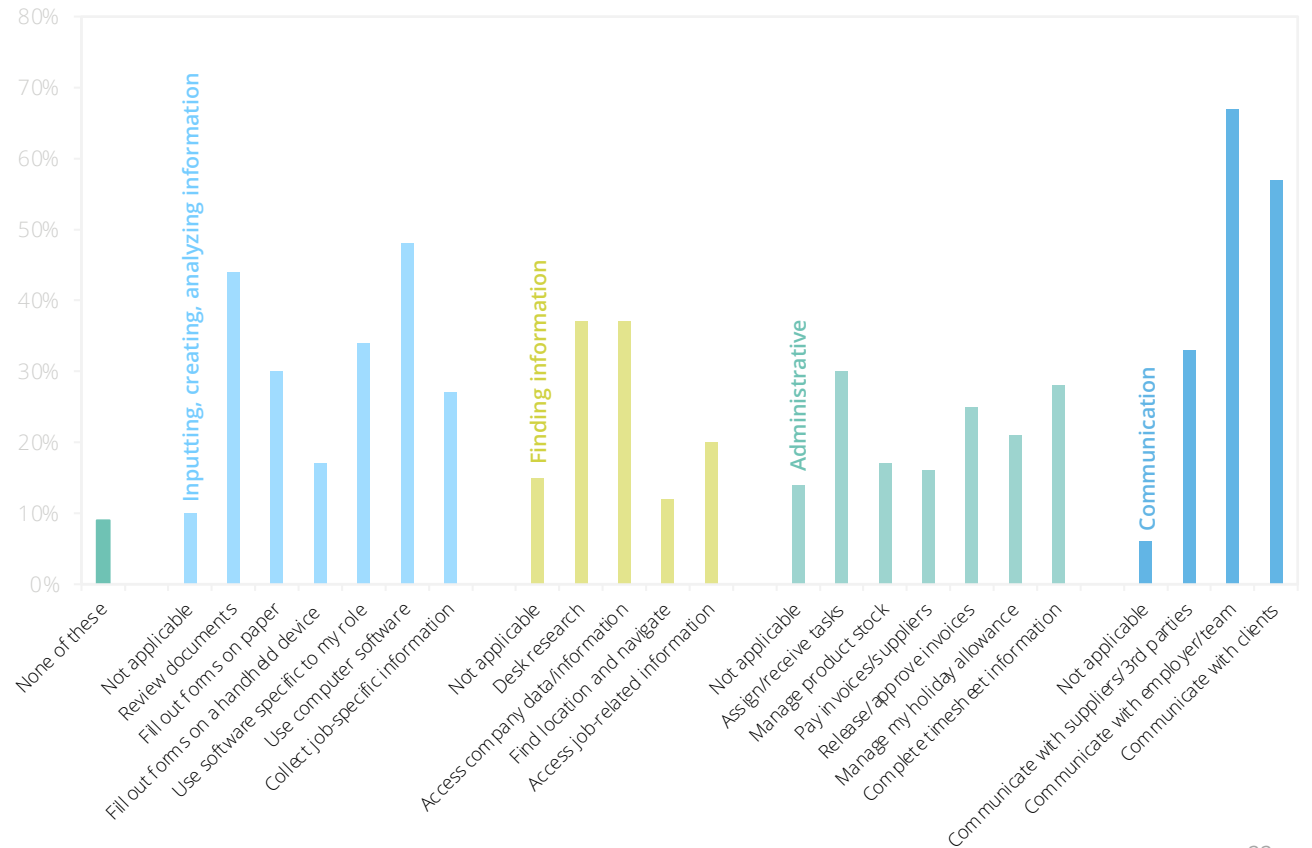
Employees indicated that many of the tasks they are performing today can be done using a smartphone. Employees think that mobile can be used for:

- 49% using the smartphone for communication purposes with employers or colleagues
- 36% for communication with clients
- 23% for communication with suppliers and other third parties

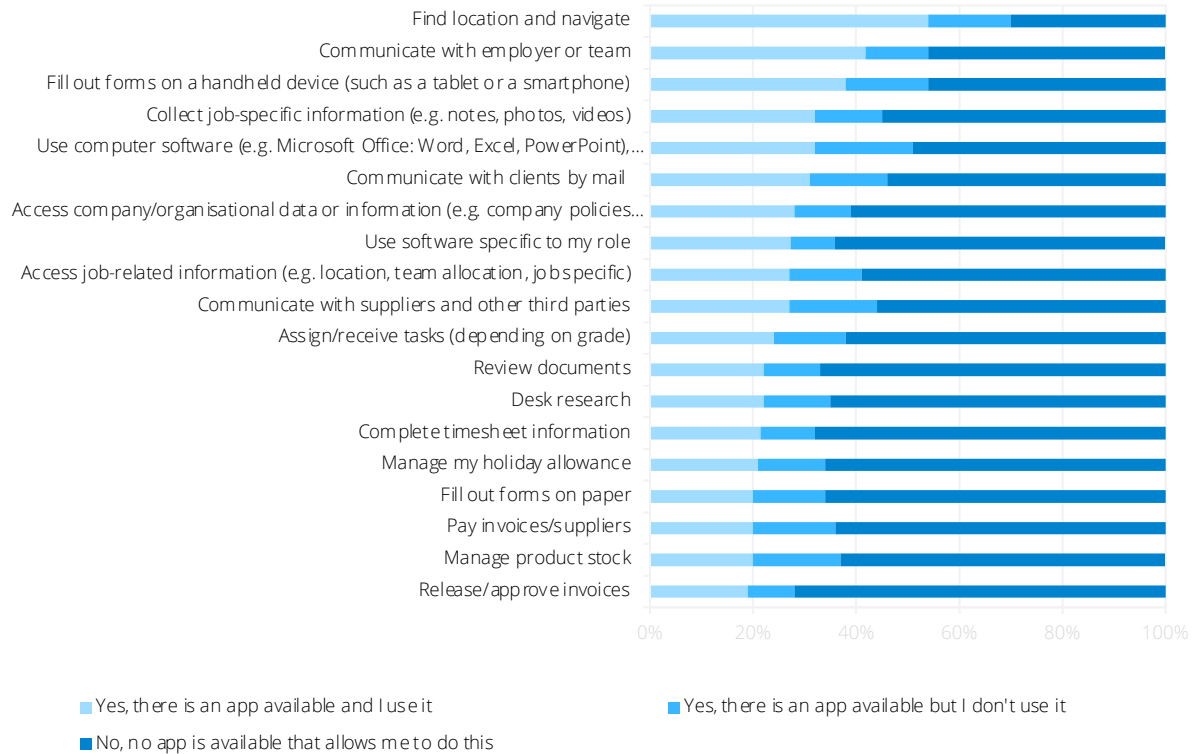
A lot of tasks are still done without mobile devices.

In 2022 only 17% employers use handheld devices to fill out forms (4% more than in 2019) and 30% of employers still fill out forms on paper.

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



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



The sky's not even the limit

Employees have indicated that mobile has the potential to substantially support specific processes at work. Yet, only half of employees (52%) – almost the same number as in 2019 - responded that they have access to apps to support these processes. This indicates that enterprises are still not offering the right solutions to meet employee demands.

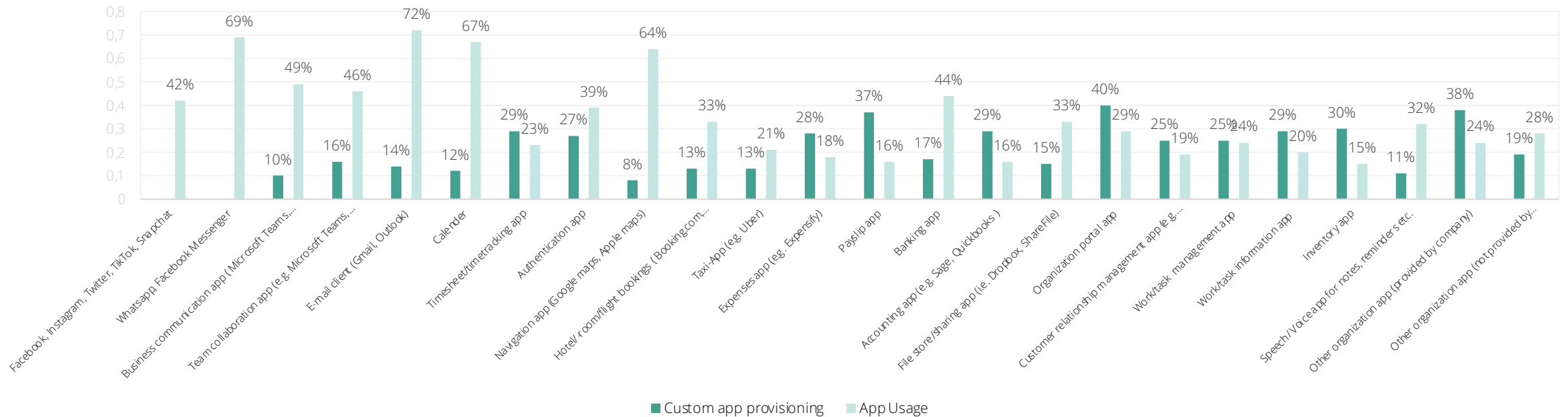
- Still only 31% of employees believe they received the training needed to fully exploit the potential of using a smartphone or tablet for work-related tasks.
- 49% of employees believe, however, that smartphones or tablets are easier to use for some tasks than a laptop or desktop.

Stone-cold fact: apps (consumer or custom-built) are becoming more and more essential in everyday work

Due to the need for remote working solutions in the last years the need for communication & collaboration apps has risen. Business communication apps are used 11% more in 2022 and team communication apps are used 9% more.

While new custom-built apps are only slowly introduced, for some tasks more custom-built apps are available in comparison to 2019. For example, there are more custom build-apps available regarding expenses (+14%) and payslips (+11%).

App usage vs. custom app provisioning 2022



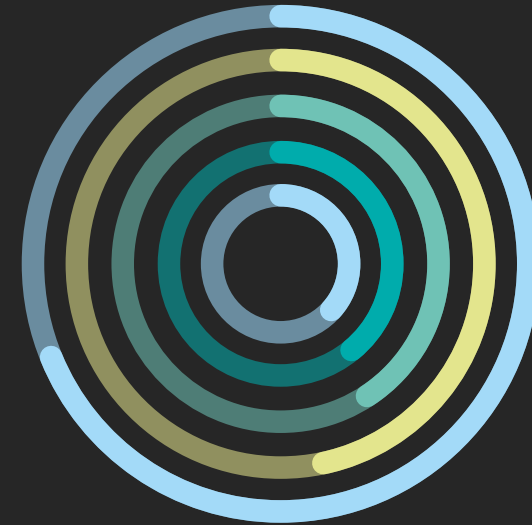
It's time to work the way we live

Your employees have embraced mobile technology - it's your turn now!

Employees expect to work the way they live, with the same familiar mobile technology they use at home. Among others, employees in the Engineering industry are most convinced, respectively 69 percent, followed by financial services with 47 percent.

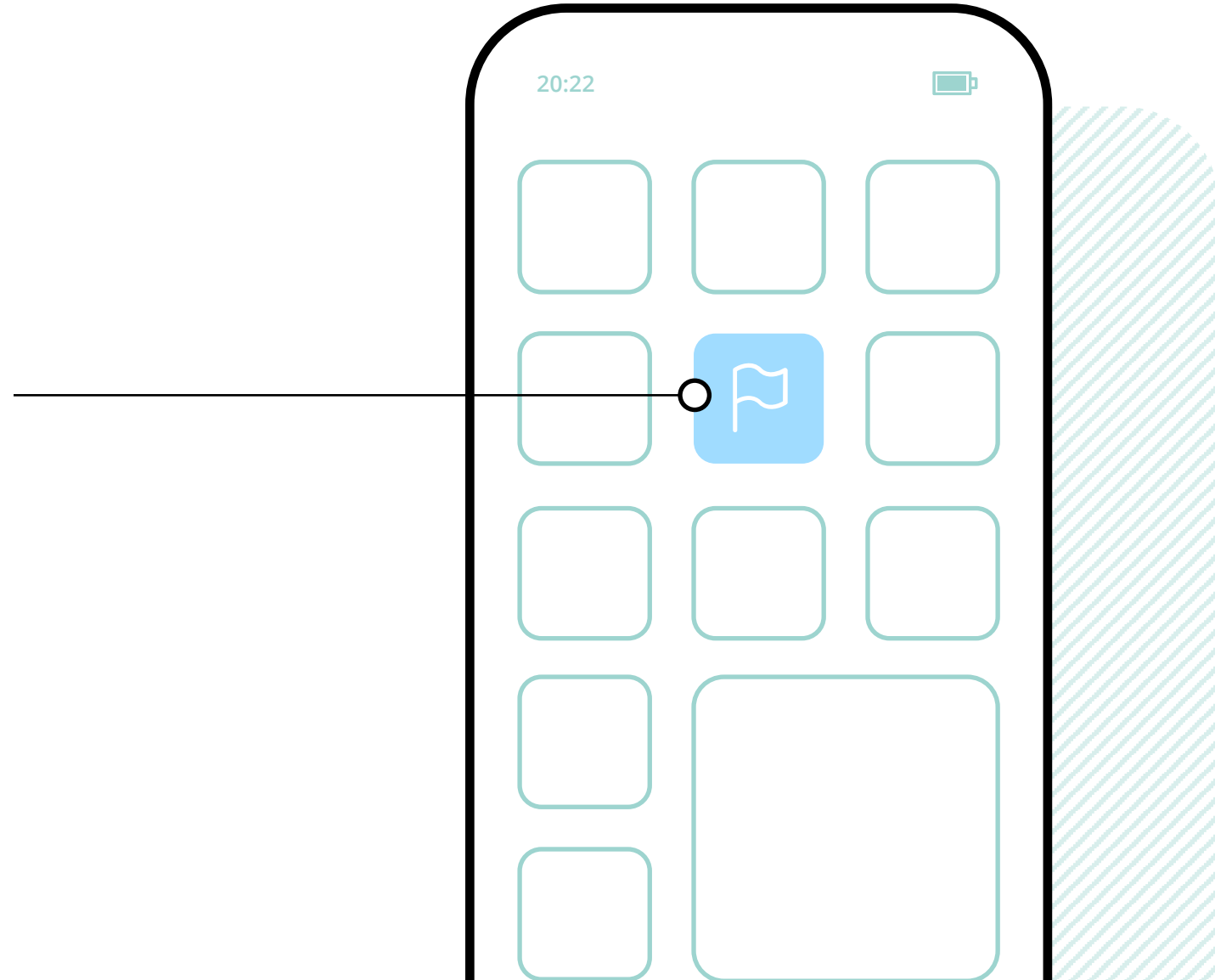
It's up to organizations to equip their employees with the right toolset that can enable them to do their jobs better, be more productive, and increase job satisfaction.

So, now is the time to work the way we live!



Engineering 69%
Financial Services 47%
Manufacturing 41%
Hotels/Entertainment 39%
Pharmaceutical industry 37%

05
LAST BUT NOT
LEAST:
FINAL THOUGHTS





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To: You

Now

Your employees have embraced mobile technology - they'd love it if you did too.

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

Obviously, some industries are ahead of others. Not only in terms of providing devices but also in terms of providing the best solutions for employees. 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—you're not too late!

We have seen enterprises taking mobile in the enterprise very seriously, creating all sorts of benefits from various angles. It starts with listening to your employees and paying attention to their needs. Not just because they are experienced in using mobile devices and solutions (consumerization) but also because they see the opportunity of improving the business through the usages of mobile technology. It's a win-win scenario, so why wait?



This isn't just for fun: enterprise mobility drives value creation

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.



Disrupt the competition by enabling innovation

Innovation is key for the success of your company. Mobile can be an enabler for innovation and disruption. It can help you transform your business and stay relevant in the marketplace.



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 well as to recent technologies like artificial intelligence and big data.



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.

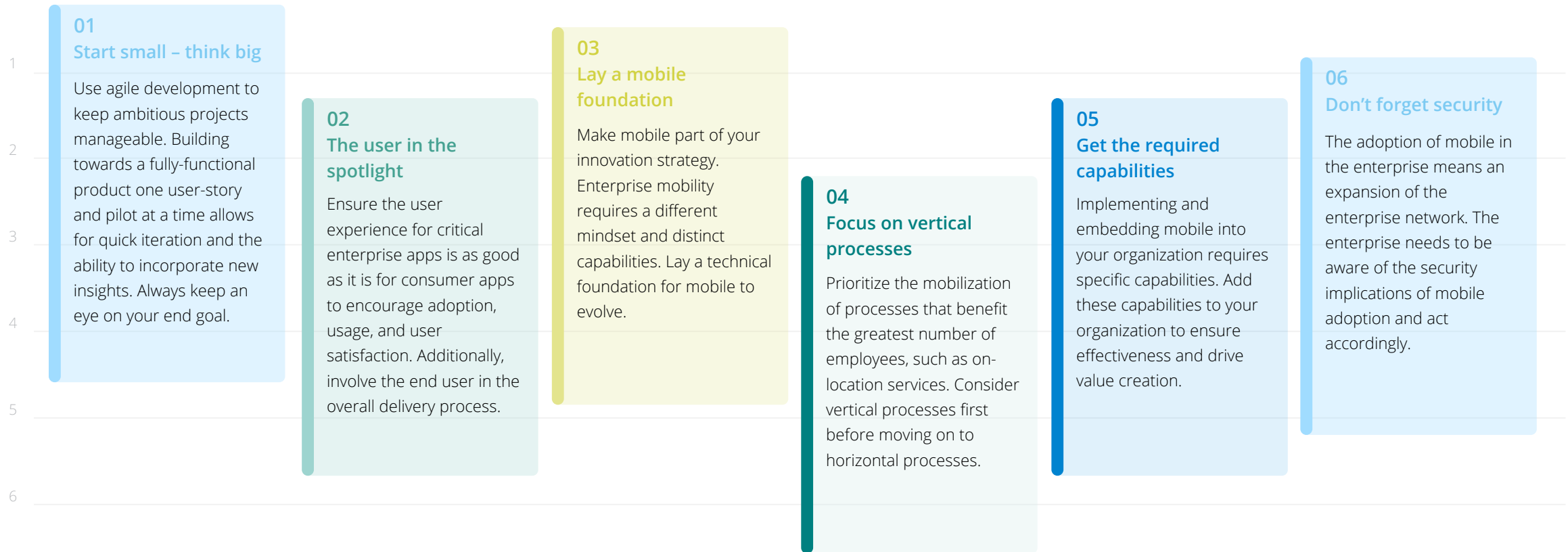


Enable new business

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




Six principles to start your enterprise mobility journey*




*Yesterday would've been better, but today is the next best time!




Let's use that remaining energy to start something good.

[Write us](#)


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