



# TABLETS AND THE EUROPEAN PRODUCTIVITY REVOLUTION

EXECUTIVE SUMMARY

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## EXECUTIVE SUMMARY

These findings, from one of the most comprehensive studies of tablet use in European business, point to a staggering productivity revolution underway as a result of the deployment of tablets in the workplace.

The opinions of users and business tablet purchasers may vary slightly but both groups fundamentally believe that tablets are changing the way people work to make them more efficient and effective than we have ever seen before.

However, the business tablet market is still relatively young and the feedback from users suggests that productivity could be significantly further enhanced by addressing some of their design and functionality frustrations. In fact, workers using their tablets for more specialised activities were almost twice as frustrated with the design and functionality of their devices than the average tablet users.

If productivity improvements are to continue there is a stark warning for businesses and tablet manufacturers in this statistic. Tablet manufacturers need to continue to tailor their devices to the varying different needs of vertical industries and their users as businesses begin to use tablets for ever more sophisticated requirements. These needs include areas such as hot swappable batteries, daylight viewable screens, more rugged tablets and the opportunity to include or attach a range of peripherals to the devices, such as cameras, scanners, bar code readers and payment options.

As the market matures, we are seeing business tablet buyers become much more aware of these needs and demand them from their suppliers. It is something that we are focusing on very clearly and as a result I expect productivity to continue to improve as new specialist tablets are deployed for users. These are fast changing and exciting times. I hope that you find the research enlightening and helpful in your future tablet need planning.



**Jan Kaempfer**

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General Marketing Manager  
for Panasonic Computer Product Solutions.

# OVERVIEW

THIS REPORT WAS COMMISSIONED BY PANASONIC AND DETAILS QUANTITATIVE RESEARCH ACROSS 9 COUNTRIES WITH TABLET PURCHASERS AND USERS IN COMPANIES WITH 50+ EMPLOYEES. THE TERRITORIES COVERED ARE THE UK, GERMANY, FRANCE, BENELUX, ITALY, SPAIN, RUSSIA, TURKEY AND POLAND.

A TOTAL SAMPLE OF 2,362 INTERVIEWS WAS COLLECTED AND SPLIT EVENLY BETWEEN TABLET USERS (49%) AND TABLET PURCHASERS (51%). ALL INDIVIDUAL COUNTRY SAMPLES EACH HAVE AT LEAST 125 TABLET USERS AND 125 TABLET PURCHASERS.



**2,362**  
INTERVIEWS



**125 TABLET  
USERS**

**125 TABLET  
PURCHASERS**



**RESEARCH  
ACROSS  
COUNTRIES** **9**

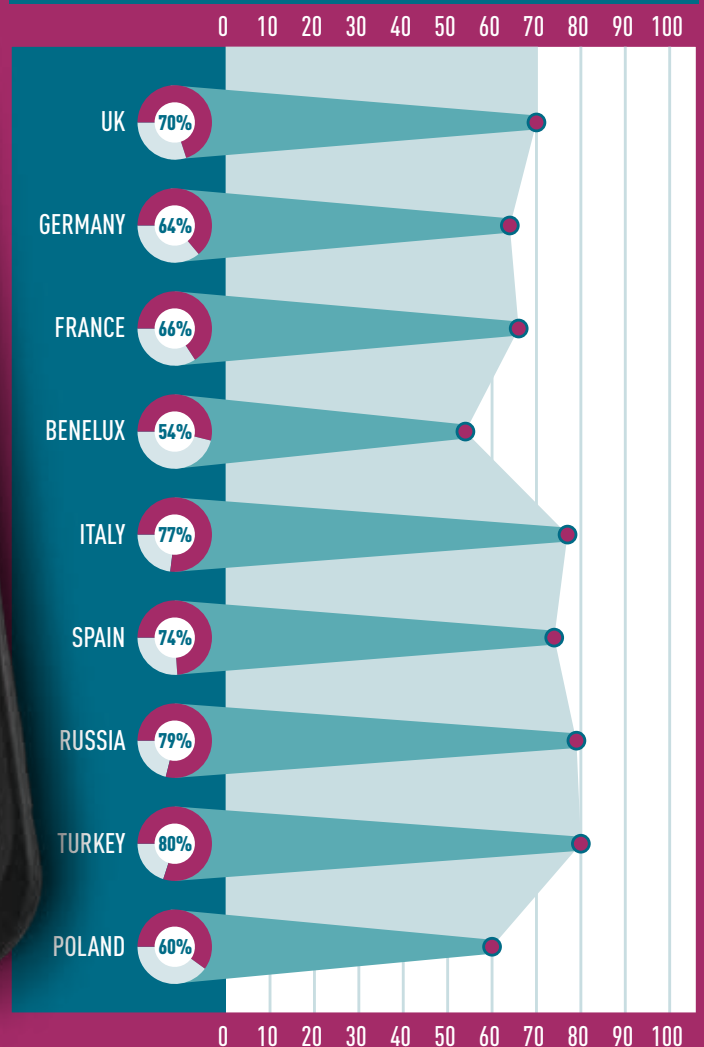
# PRODUCTIVITY REVOLUTION

TABLET USE IN EUROPEAN BUSINESS IS SPARKING A PRODUCTIVITY REVOLUTION WITH 70% OF EMPLOYERS REPORTING SUBSTANTIAL PRODUCTIVITY IMPROVEMENTS FROM EMPLOYEES USING TABLETS.

ACROSS EUROPE, TABLET PURCHASERS IN TURKEY, (80%), RUSSIA (79%), ITALY (77%) AND SPAIN (74%) WERE MOST CONVINCED OF THE PRODUCTIVITY BENEFITS OF TABLETS FOR THE WORKFORCE.



% TABLET PURCHASERS THAT HAVE SEEN IMPROVEMENTS



## EMPLOYERS' ESTIMATIONS

ON AVERAGE, EMPLOYERS ESTIMATED THAT PRODUCTIVITY AMONGST TABLET USING EMPLOYEES HAD RISEN BY A STAGGERING 33%. HOWEVER, THE HIGHEST ESTIMATED PRODUCTIVITY RATES WERE REPORTED BY BUYERS IN THE UK (44%), TURKEY (42%) AND POLAND (43%) – WELL ABOVE THE AVERAGE PRODUCTIVITY IMPROVEMENTS OF 33%.

**33%**

PRODUCTIVITY  
IMPROVEMENTS  
FROM TABLET USE  
ACROSS EUROPE

UK 44%

GERMANY 27%

FRANCE 31%

BENELUX 28%

ITALY 32%

SPAIN 28%

RUSSIA 28%

TURKEY 42%

POLAND 43%

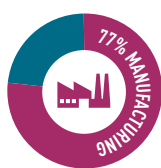
## PRODUCTIVITY INCREASE BY INDUSTRY

MANUFACTURING APPEARED TO BE THE INDUSTRY SECTOR BENEFITING MOST FROM TABLET DEPLOYMENT WITH 77% OF BUYERS IN THIS SECTOR REPORTING PRODUCTIVITY BENEFITS.

**70%**

PRODUCTIVITY  
IMPROVEMENT FOR  
INDUSTRIAL SECTORS

74% OF TELECOMS AND UTILITIES TABLET BUYERS HAD SEEN PRODUCTIVITY BENEFITS, 72% IN RETAIL AND WHOLESALE AND 71% IN FINANCIAL SERVICES.



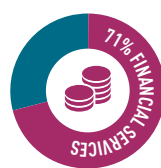
**77%**



**72%**



**57%**



**71%**



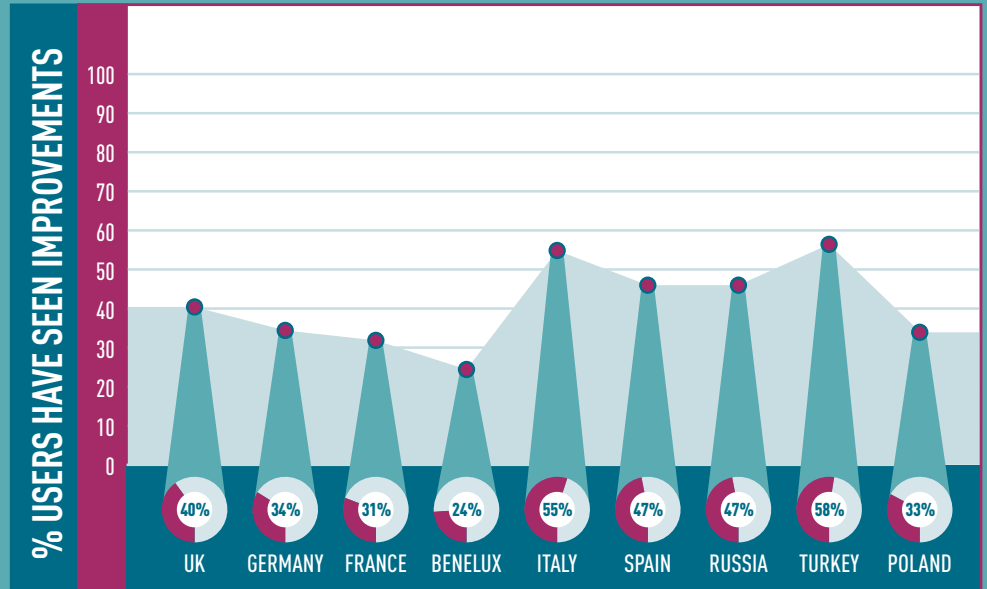
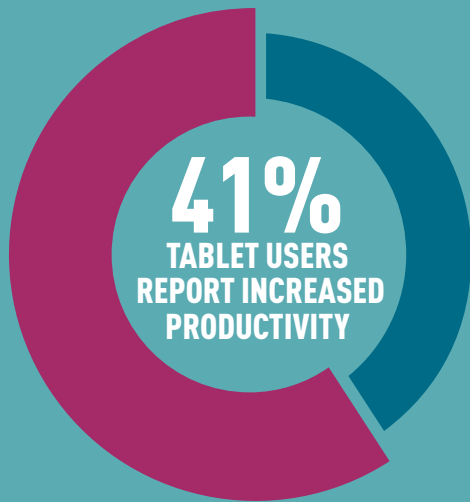
**67%**



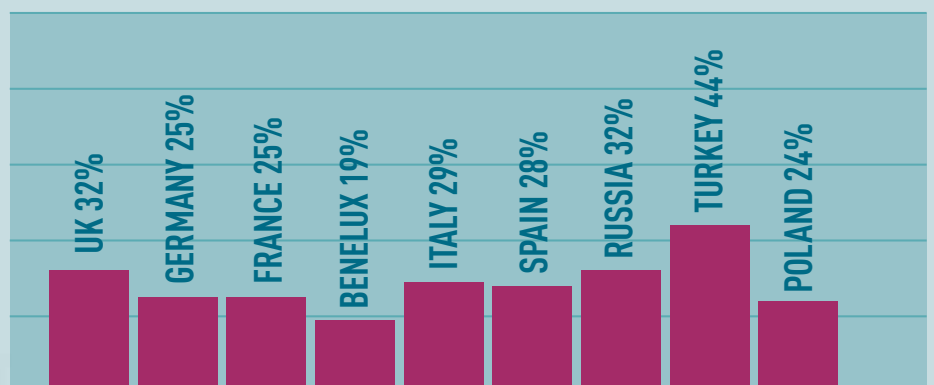
**74%**

# TABLET USERS' PRODUCTIVITY INCREASE

INTERESTINGLY, THE TABLET USERS THEMSELVES WERE LESS CERTAIN BUT STILL 41% BELIEVED THAT WORKING WITH A TABLET HAD INCREASED THEIR PRODUCTIVITY AND ESTIMATED THEIR PRODUCTIVITY IMPROVEMENT AT A SIMILAR 30% ON AVERAGE.



USERS ESTIMATE  
THAT THEIR  
PRODUCTIVITY HAS  
INCREASED BY  
**30%**



# TABLETS AN INDISPENSABLE WORK TOOL



TABLETS ARE ALSO BEING USED FOR  
A WIDE RANGE OF SPECIALIST WORK.

A FIFTH (20%) OF USERS WERE CONNECTING SCANNERS, PRINTERS  
OR CAMERAS TO THEIR TABLETS USING USB OR SERIAL PORTS.

18%

HAD USED THEIR TABLETS  
FOR GIS INFORMATION



13%

AS A  
BAR CODE READER



10%

FOR TAKING  
CUSTOMER PAYMENTS



10%

MONITORING  
LOGISTICS OPERATIONS



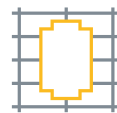
8%

FOR SIGNATURE  
CAPTURE

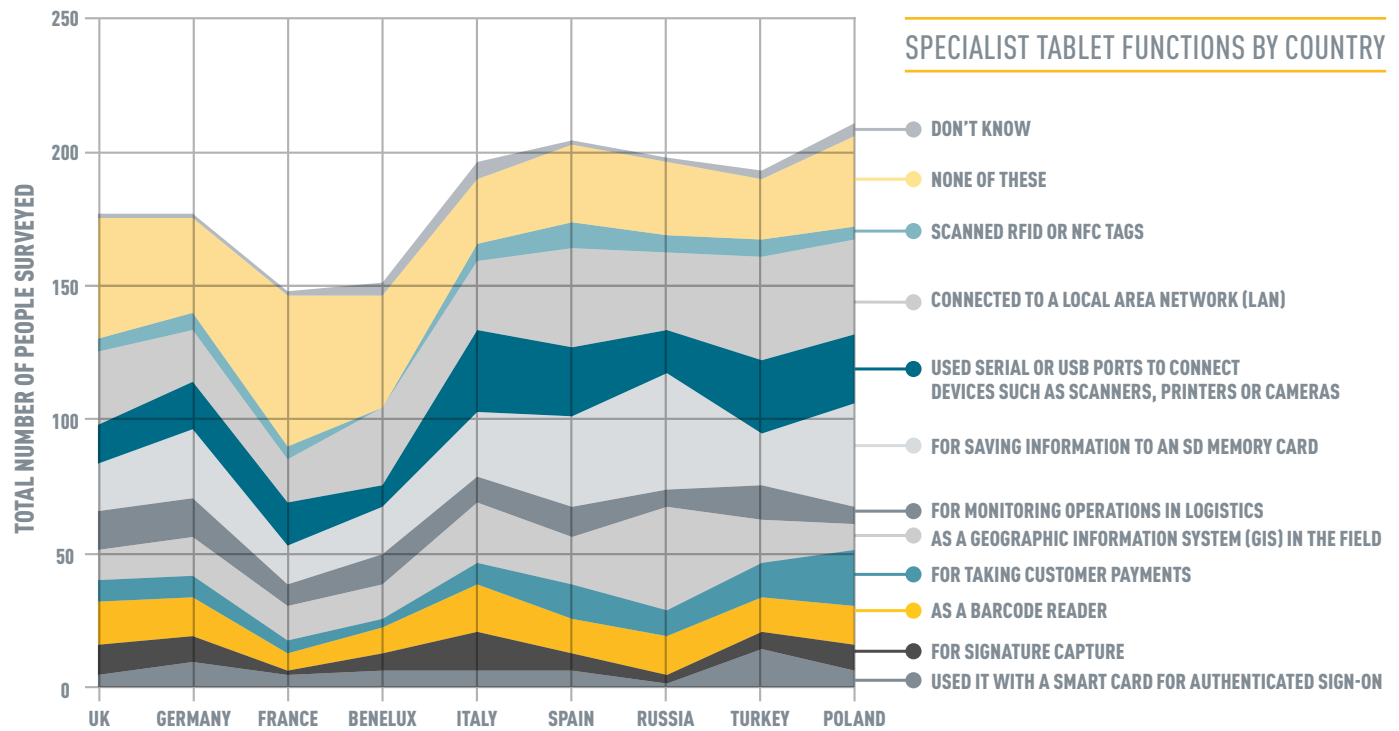


6%

FOR SMART  
CARD AUTHENTICATION AND  
SCANNING RFID AND NFC TAGS

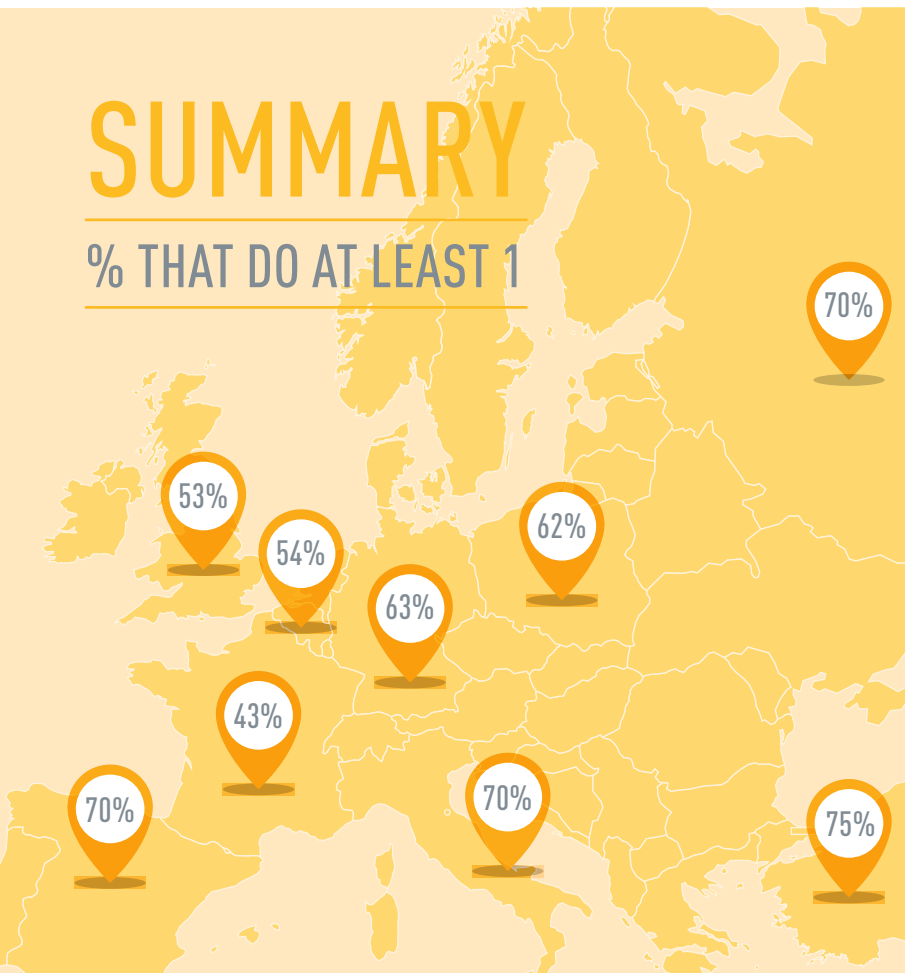




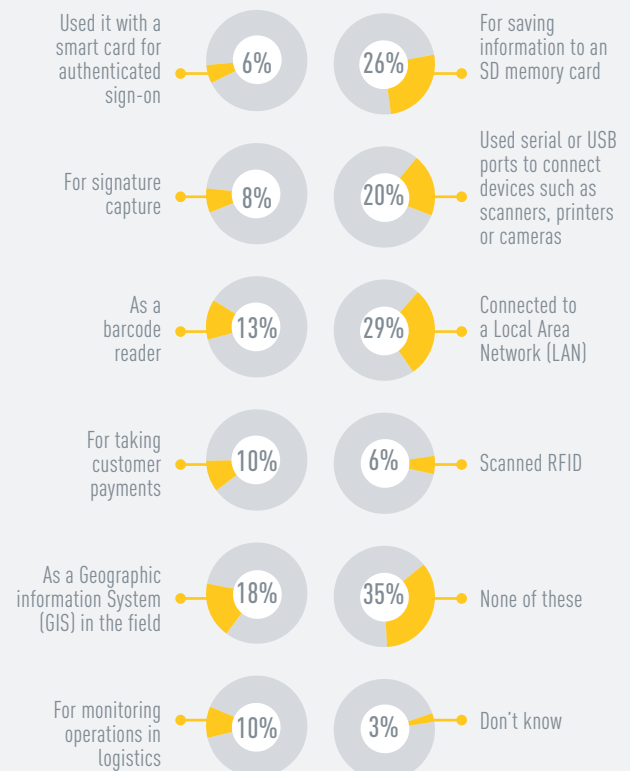


## SUMMARY

% THAT DO AT LEAST 1



### SPECIFIC FUNCTIONS USED



TELECOMS AND UTILITIES



THE INDUSTRY SECTORS LEADING IN THE MORE SPECIALIST USE OF TABLETS IN THE WORKPLACE ACROSS EUROPE WERE



TRANSPORT AND DISTRIBUTION

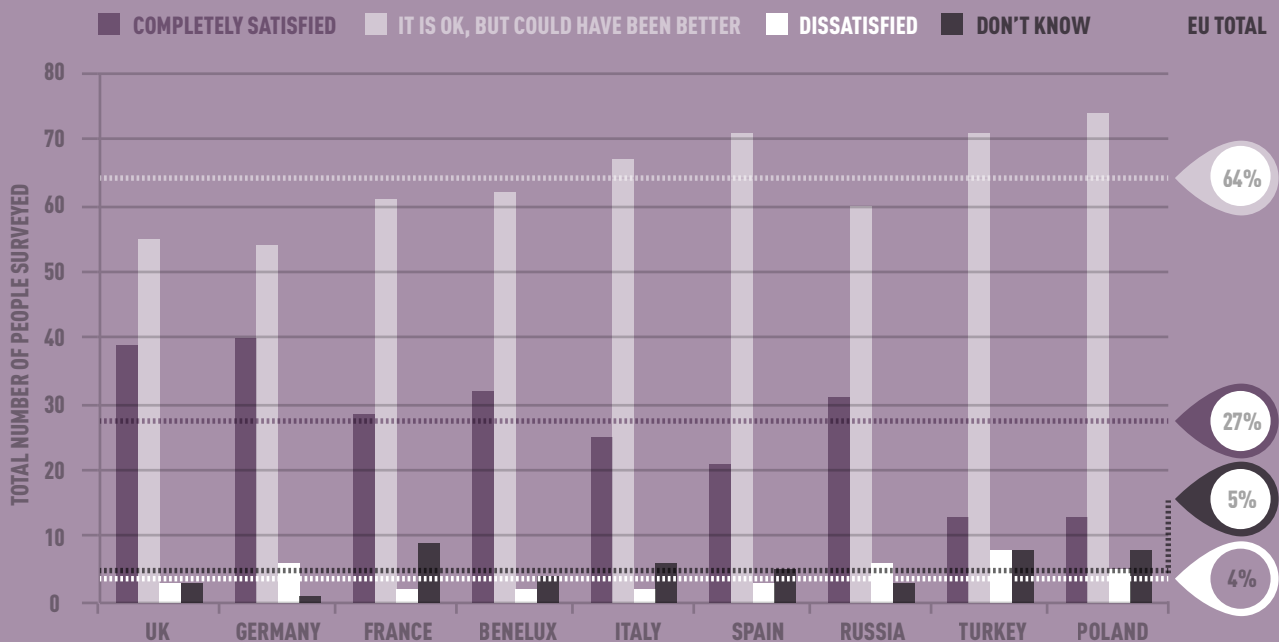


# ROOM FOR IMPROVEMENT

Despite these productivity increases, users report that there is still room for improvement with their tablet devices.

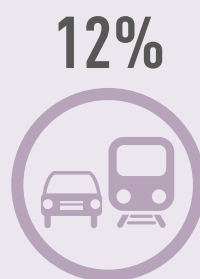


**68% OF USERS**  
SAID THAT THEY WERE NOT  
COMPLETELY SATISFIED WITH THE  
PERFORMANCE OF THEIR TABLET  
FOR WORK-RELATED ACTIVITIES

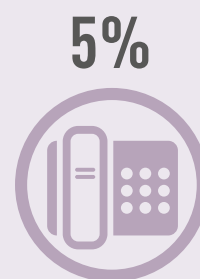


# TABLET DISSATISFACTION

BY INDUSTRY SECTOR, 12% OF TABLET USERS IN TRANSPORT, TRAVEL AND DISTRIBUTION SAID THEY WERE DISSATISFIED WITH THEIR DEVICE, 5% IN TELECOMS AND UTILITIES AND 4% IN THE PUBLIC AND NOT-FOR-PROFIT SECTOR.



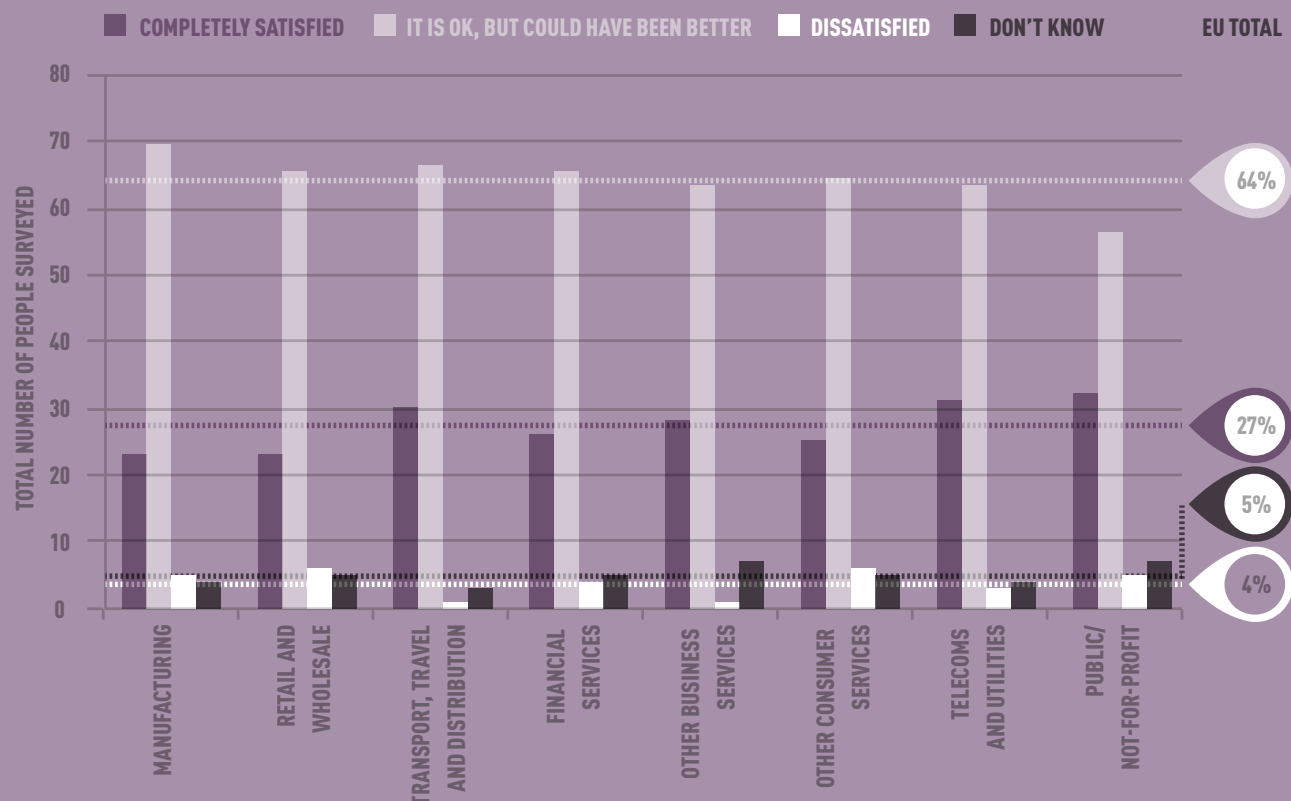
TRANSPORT, TRAVEL  
AND DISTRIBUTION



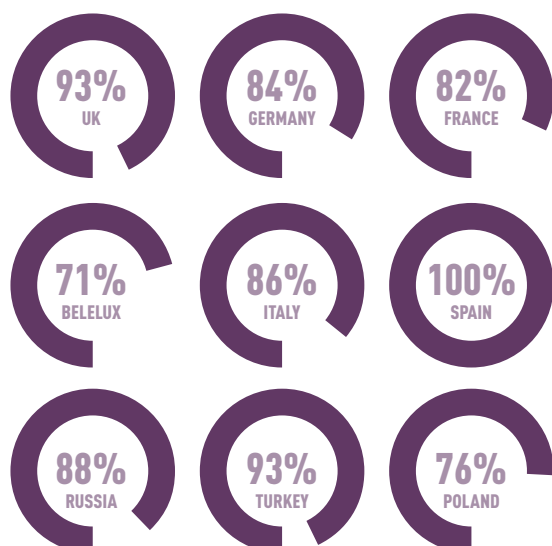
TELECOMS



PUBLIC SECTOR



# PERCENTAGE OF WORKERS ENCOUNTERING AT LEAST 1 ISSUE



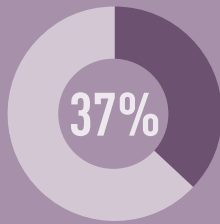
THOSE THAT USED THEIR TABLET FOR MORE SPECIALISED WORK ACTIVITY WERE ALSO ALMOST TWICE AS FRUSTRATED WITH THE POOR DESIGN AND FUNCTIONALITY OF THEIR DEVICES – 65% COMPARED TO 33%.

IN ADDITION, 86% OF TABLET PURCHASERS REPORTED THAT THEIR USERS HAD ENCOUNTERED PROBLEMS WITH THEIR TABLETS IN THE PAST 2 YEARS AND 77% REPORTED ISSUES AS A RESULT OF POOR DESIGN OR FUNCTIONALITY.

**86%**  
OF TABLET  
PURCHASERS  
ACROSS  
EUROPE HAD  
ENCOUNTERED  
PROBLEMS

# TABLET ISSUES BY COUNTRY

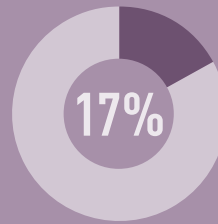
AT THE TOP OF THE LIST WERE ISSUES SUCH AS:



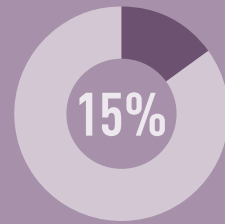
BATTERY LIFE TOO SHORT



DAMAGED TOO EASILY

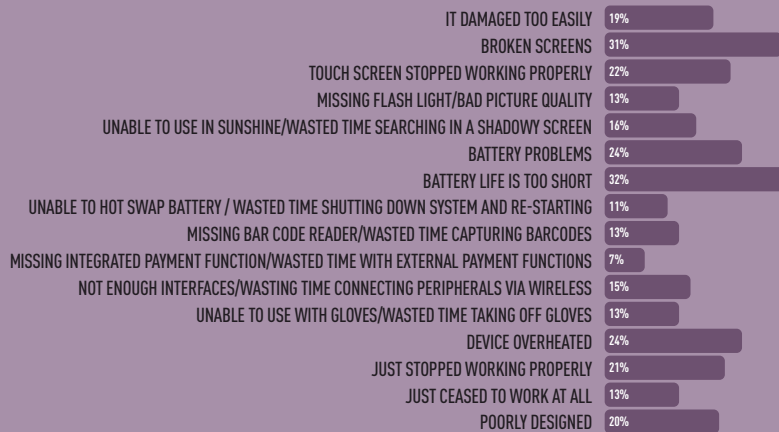


UNUSABLE IN SUNSHINE

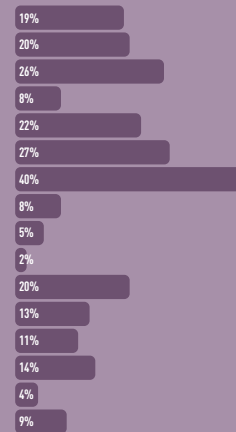


NOT ENOUGH INTERFACES

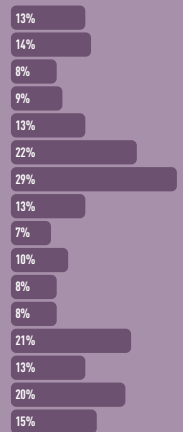
## UK



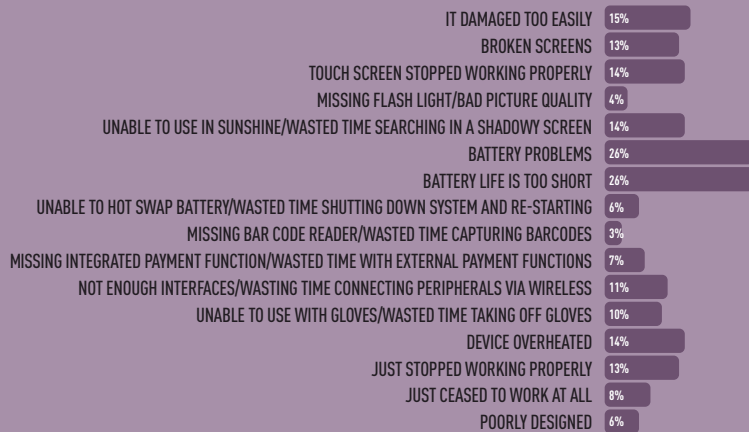
## GERMANY



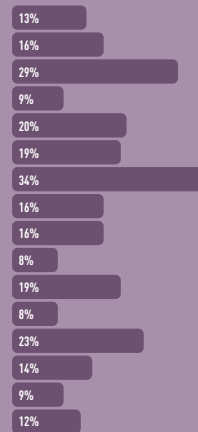
## FRANCE



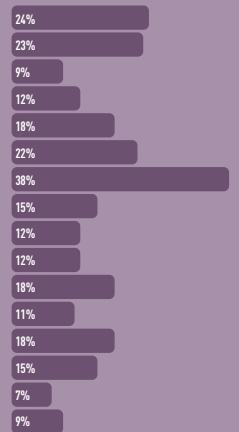
## BENELUX



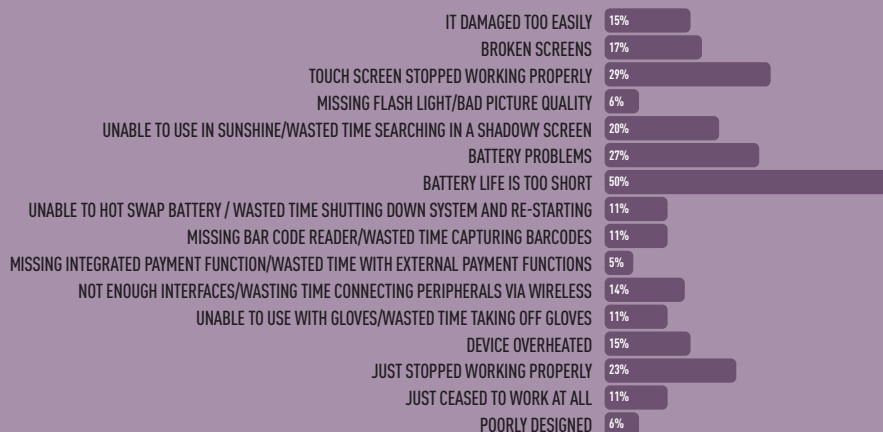
## ITALY



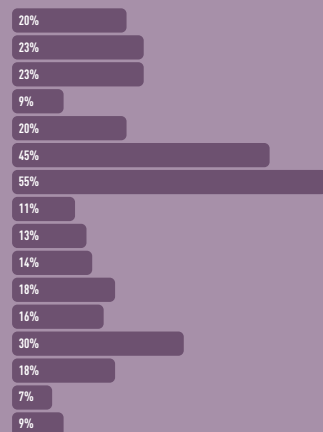
## SPAIN



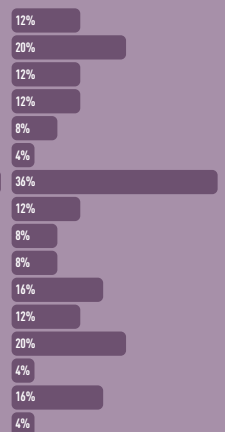
## RUSSIA



## TURKEY

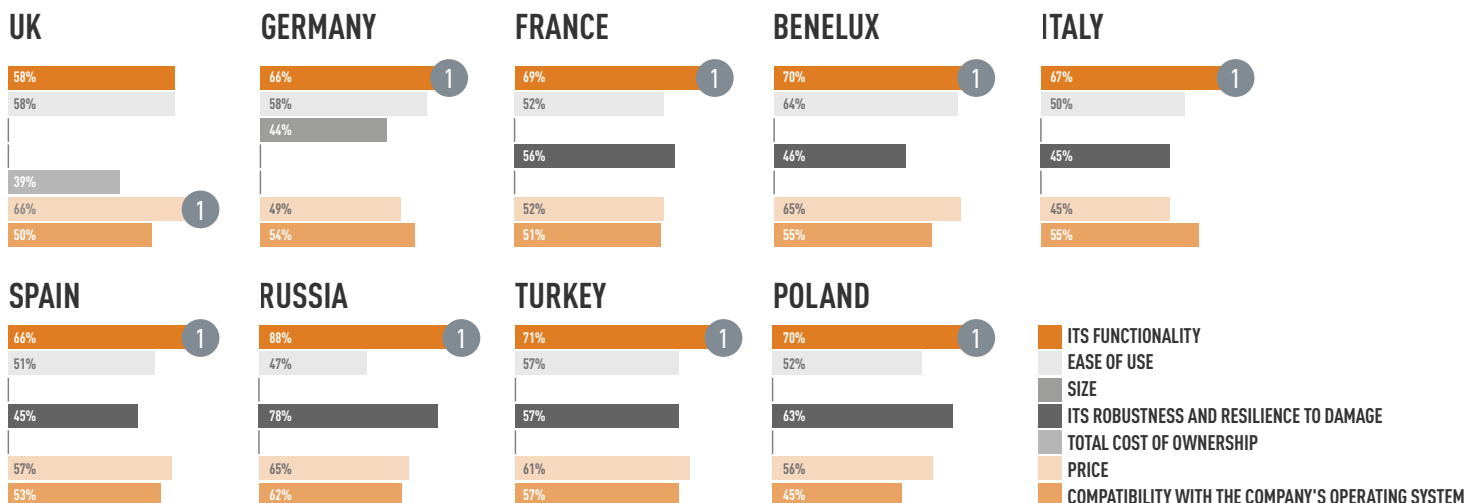


## POLAND



# TOP 5 BUSINESS TABLET CRITERIA

THE TOP 5 CRITERIA FOR BUSINESS  
BUYERS SELECTING A TABLET WERE



# Panasonic



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