

# RISE OF THE MACHINES

European research into mobile workforce preferences



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# Hybrids threaten Business laptops dominance in Europe

Despite the promise of tablets to revolutionise mobile working, our latest research shows that the laptop remains the preferred choice for the European mobile workforce. The tablet has no doubt taken a significant market share and there are job roles where its form factor is ideal.

But the additional surprise from the research was the confidence of the workforce in the potential for convertible and detachable hybrid devices to improve productivity over the coming years.

For a group of devices that has only recently been introduced to the market and with the variety of options emerging, it is interesting to see that hybrids have already captured the imagination.



The appeal of offering the best of both the tablet and laptop worlds is an obvious attraction. However, manufacturers must be aware that the underlying reasons that employers and the workforce alike see the hybrid playing a key role in the future is the promise of additional benefits. These benefits, such as improved functionality, battery life, a keyboard and better connectivity to name just a few, are the real desires from mobile workers that we should pick up on to create the devices of the future.

Panasonic research into business technology buyers and users across 10 European regions revealed that 9 of 10 mobile workers still prefer traditional laptops, and that while hybrid convertible or detachable devices are currently being used by 12% of the workforce, 36% of those sampled think the hybrid will be the dominant business computing tool within the next three years.

# INTRODUCTION

The research, commissioned by Panasonic and undertaken by Market Dynamics, surveyed more than 2,650 business technology buyers and users across 10 European regions:

United Kingdom

Italy

Poland

Germany

Spain

Sweden

France

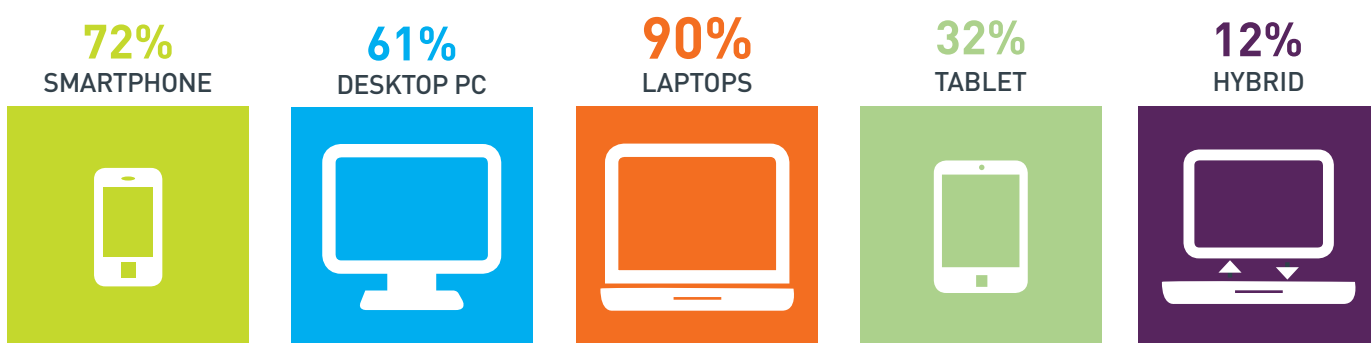
Russia

Benelux

Turkey

## LAPTOPS STILL DOMINATE

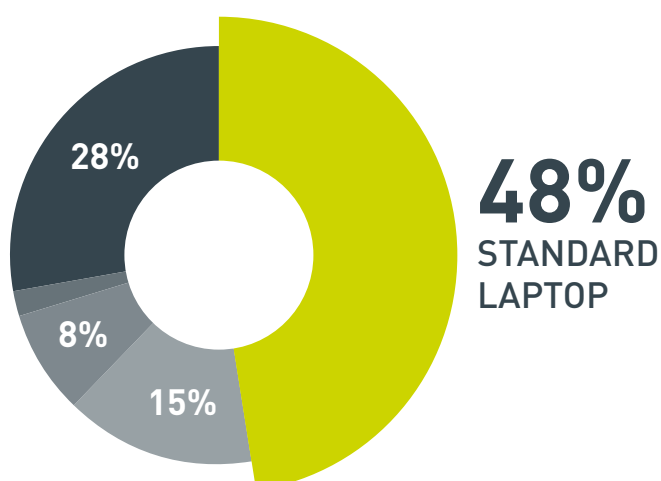
Laptops are still used by 90% of European employees for work activities, with 72% using a smart phone, 61% using a desktop computer and 32% using a tablet. Hybrid convertible or detachable devices are being used by 12% of the workforce.



## PRODUCTIVITY RULES

And when asked about the most productive device when working away from the office, 48% of workers and technology buyers across Europe said the laptop was top, with 28% saying a hybrid device, 15% picking the tablet and 8% the smartphone.

WHICH IS THE MOST PRODUCTIVE  
FOR MOBILE WORKING?

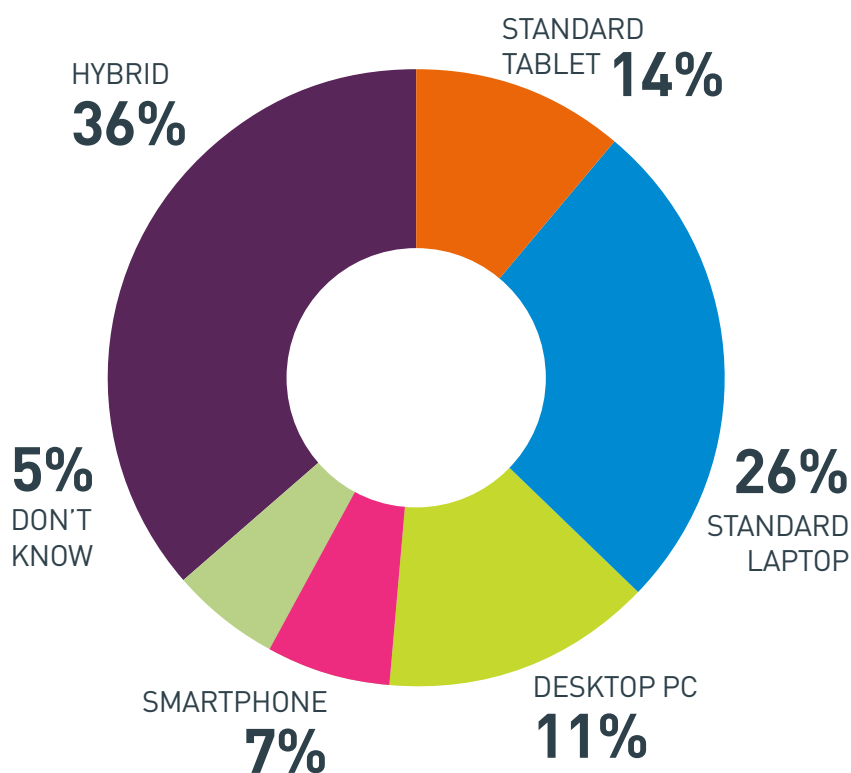




# RISE OF THE HYBRID

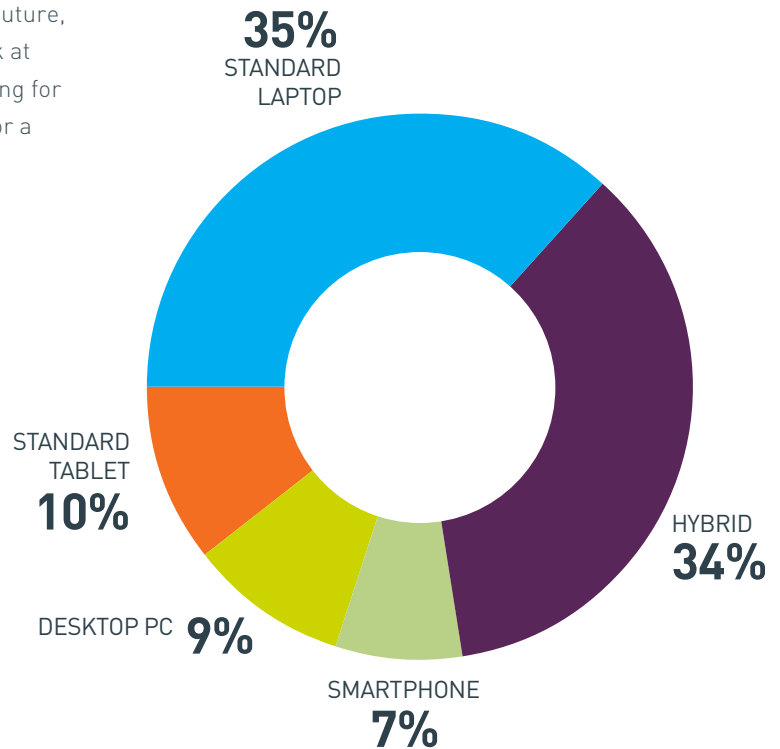
Looking to the future, the dominance of the laptop in Europe looks set to end with 36% of those sampled thinking the hybrid will be the dominant business computing tool within the next three years, with the laptop at 26%, the tablet at 14%, desktop PC at 11% and smartphone at 7%. In fact, more than half of all European workers (54%) not currently using a hybrid believe they will start to use one in the next 3 years. The industry sector workers most likely to move to hybrids were Defence (80%) and Retail (72%).

## EUROPE WIDE, PREDICTED DOMINANT BUSINESS COMPUTING TOOL



# THERE CAN ONLY BE ONE

And if European users could pick just one device in the future, the laptop and hybrid devices are already neck and neck at the top of the table with 35% choosing laptops, 34% opting for a hybrid, 10% for tablets, 9% for a desktop PC and 7% for a smartphone.



## CLEAR DRIVERS FOR CHANGE

The four main drivers for would-be adopters of hybrid devices across Europe were: more functionality and better availability of software (44%), better performance (42%), longer battery life (42%) and presence of a keyboard (39%). Another 30% were enticed by more interfaces available on such devices (e.g. more than one USB port etc), while almost as many (29%) were keen on the better connectivity / peripherals (e.g. smart card etc). Almost a quarter (24%) would relish a better screen, while just over a fifth (21%) thinks hybrids are more robust. There are clear signs that as users become more familiar with mobile PCs they understand how the addition of important features can make their work lives easier and more productive. More connectivity options can ensure the device works with important peripherals such as bar code readers, increased performance can make intensive graphic software available when on the move, better screens are designed for use outside in bright sunlight or poor weather.



**39%**  
Keyboard



**24%**  
Screen



**42%**  
Performance



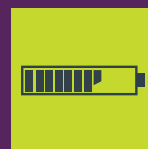
**44%**  
Software



**30%**  
More  
interfaces



**29%**  
More  
peripherals



**42%**  
Battery



**21%**  
Robust

# CONCLUSION

This research clearly shows that the traditional laptop remains the dominant device for mobile workers in the European business community, although the tablet has made significant in roads in a short space of time. But it is the rise of the convertible and detachable hybrid machines, only very recently introduced to the market, that threatens to topple the laptop's crown. With their added capabilities and flexibility, it appears that these devices have already captured the imagination of user and buyers alike and look set to take a much larger market share over the coming years.



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