

## In the midst of the mobile revolution

It is now clear that mobile technologies are reshaping business models and enabling companies to engage with customers and their employees in new ways. PwC's 5th Annual Digital IQ Survey reaffirms that leaders are building upon trends that PwC has been helping clients evaluate for some time—such as the consumerization of information technology, allowing employees to “bring your own device” (BYOD), and the growing pressure to enable instantaneous contact, collaboration and feedback with stakeholders. Organizations that are not paying attention may soon lag competitors in efficiency and profitability.

Leaders are paying attention. Our survey found that respondents are investing more this year in mobile technologies for their employees than in any other technology. Mobile is also the most frequently cited technology for increasing productivity and innovation.

Let's look at some of the key mobile trends among Top Performers and by region and industry.

### Who is mobilizing the most? Top Performers\* are:

- Investing more in mobile for both employees and customers
- Engaging with customers more frequently using mobile technologies
- Tailoring IT strategies more often based on generational differences

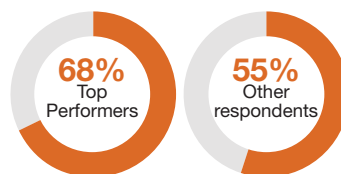
## Reshaping customer engagement

Increasing hardware, software and connectivity capabilities on mobile platforms offer endless opportunities for organizations to create and sustain rich experiences with their stakeholders. More than half of those surveyed are engaging customers with mobile.

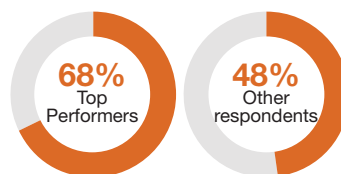
### Top Performer advantage

Top performers are not only more aggressively investing in mobile technologies for customers this year—they are also much more significantly using mobile to interact with customers compared to other respondents.

What are your investment plans for mobile technologies for customers?  
Will invest more in 2013



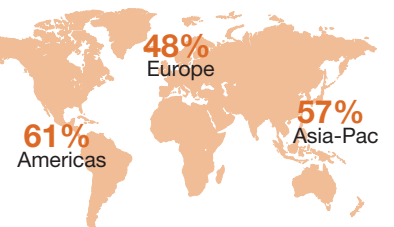
To what extent is your organization interacting with customers using mobile technology?  
Very significantly or quite significantly



### Global glimpse

Respondents in the Americas are more likely to be investing more in mobile technologies for customers in 2013. However, respondents in Asia-Pac lead other regions in interacting with customers using mobile. Executives in the Americas may be ramping up to reach out with mobile.

What are your investment plans for mobile technologies for customers?  
Will invest more in 2013



### Industry insight

Healthcare, Retail & Consumer, Transportation & Logistics, and Entertainment, Media & Communications industry respondents are more likely to be investing more in mobile for customers in 2013.

Meanwhile, the technology industry is reaping the rewards of early investments and engaging with customers using mobile more than all other industries in our survey. Utilities and Automotive industry respondents are investing the least.

\* Top Performers are those respondents that reported revenue growth of > 5% and said that their companies are in the top quartile for revenue, profitability and innovation.

## Interacting, problem solving and informing

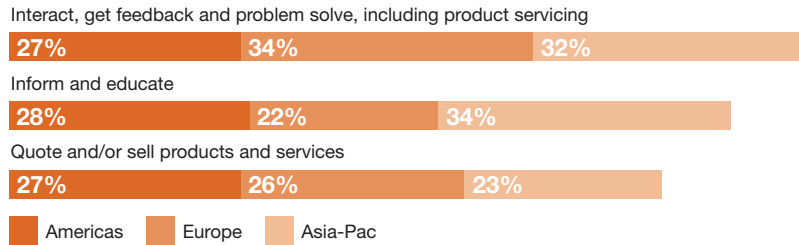
Companies are using mobile technologies to mobilize their work forces and engage with customers in different ways. Interaction varies by Top Performers, industries and regions.

How would you characterize your approach to interacting with customers using mobile technology? Is it mainly to...



% reflects overall respondents

How would you characterize your approach to interacting with customers using mobile technology? Is it mainly to...



## Moving employees to the mobile platform

### Top Performer advantage

Nearly twice as many Top Performers (32%) say they have everything they need on their mobile platforms compared to 17% of other respondents. We suspect that even those reporting that they have all they need will be adding increasingly sophisticated tools, apps, sensing and analytics to their mobile capabilities.

### Global glimpse

Most regions still have work to do to increase their mobile capabilities. Europe is farthest along with 21% of respondents having everything they need on their mobile platform, compared to 20% of Asia-Pac respondents. Americas respondents trail at 16%.

### Industry insight

Aerospace (29%) and Energy & Mining (23%) industry respondents lead in having everything they need on their mobile platforms. Only 11% of Hospitality & Leisure and 12% of Financial Services respondents have what they need on their mobile platform—risking employee frustration.

### Top Performer advantage

36% of Top Performers use mobile the most to interact, get feedback and problem solve with customers—vs. 30% of other respondents.

### Global glimpse

Respondents in Asia-Pac use mobile the most to inform and educate customers. In Europe, the number one priority is interaction, feedback and problem solving.

### Industry insight

Hospitality & Leisure, Utilities and Technology industry respondents are using mobile to inform and educate their customers. Meanwhile, Aerospace & Defense, Healthcare, Entertainment, Media & Communications and Auto industry respondents lead other sectors in using mobile to interact, get feedback and solve problems with customers.

While the mobile trend is evident, only 19% of overall respondents have everything they need—policies, tools, apps, etc.—on a mobile platform for employees, indicating that we are just getting started. Most companies are leaning heavily on outsourcers, which likely isn't sustainable. Companies need to bring some mobility skills in-house to address strategic opportunities and innovation.

How equipped are the employees in your organization to deliver products and services using mobile technology?



To have a deeper conversation about how this subject may affect your business, please contact:

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