



PERFECTLY ADAPTED NOT QUITE ADOPTED

THE STATE OF TABLET USE IN THE UTILITIES INDUSTRY
Multi-function capable and more-portable than laptops, tablets are an ideal fit for field use in utilities—but survey results say they're still in the early adoption phase.



THE MOMENTUM FOR MORE MOBILITY

More than half of respondents say their workers spend half – or more – of the workday in the field

WHY ADOPT TABLETS?

Among utilities that have adopted tablets, the primary drivers are ease-of-use and portability



39%
Portability



34%
Ease-of-use

EXTENT OF TABLET USAGE

Utilities are not replacing their laptops wholesale, but selectively based on worker function*



62%

Use a mix of tablets and laptops



32%

Use tablets as supplement to laptops



4%

Use tablets as primary access device

other

3%

ACCESSING CRITICAL APPLICATIONS

Laptops are still the primary device used to access critical applications*



69%

Laptop/Rugged Laptop



20%

Smartphones/handheld



8%

Tablet

other

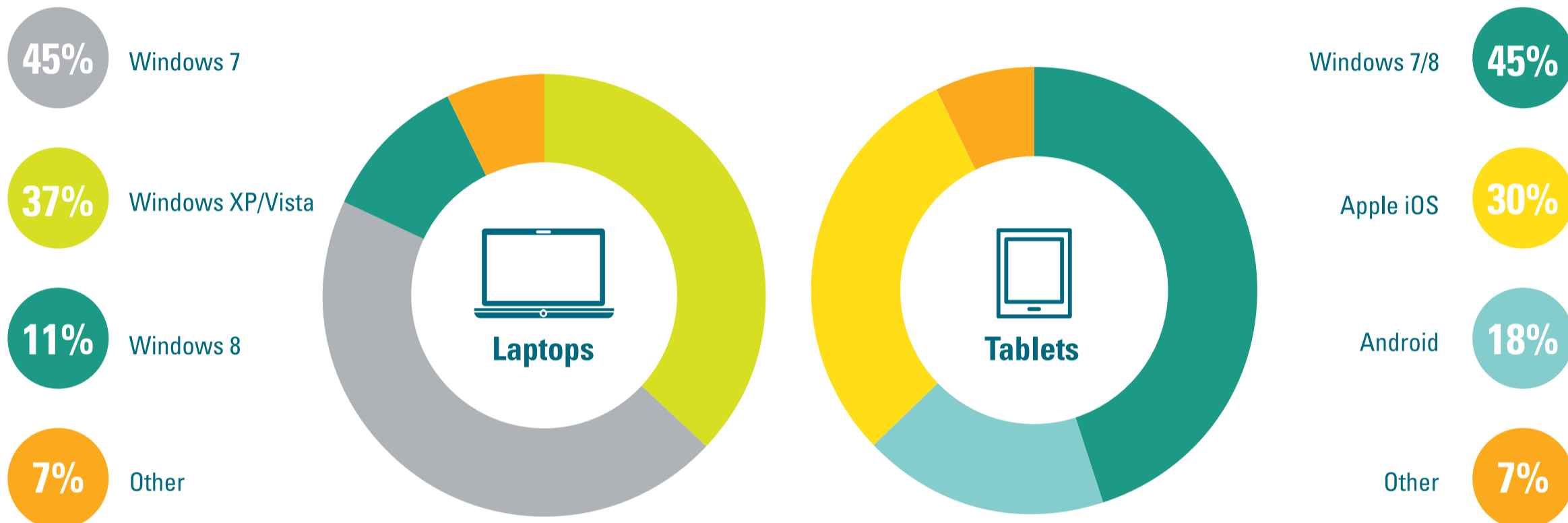
2%



EVOLVING CHOICE IN OPERATING SYSTEMS

While laptop OS's are primarily Windows, tablet adopters also turn to Android and MacOS*

OPERATING SYSTEMS BY DEVICE



ALL SYSTEMS GO

Among those who are planning to deploy tablets, no one operating system is a clear front-runner



THE DECIDING VOTE

3/4 of utilities are agreed about the drivers behind operating-system choice



Compatibility with existing infrastructure



Applications supported by OS



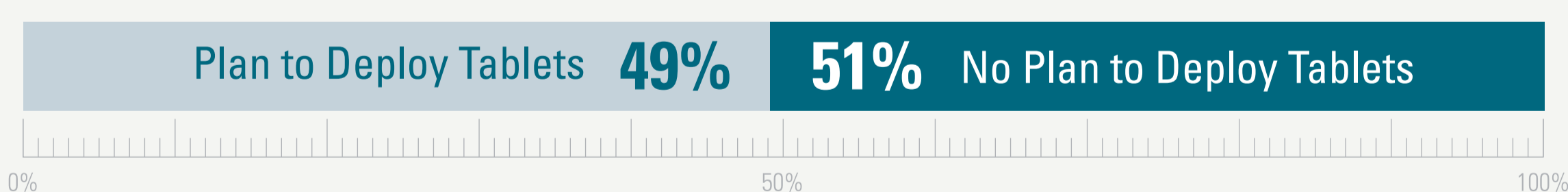
End-user requests



BROADER ADOPTION: WHAT WILL IT TAKE?

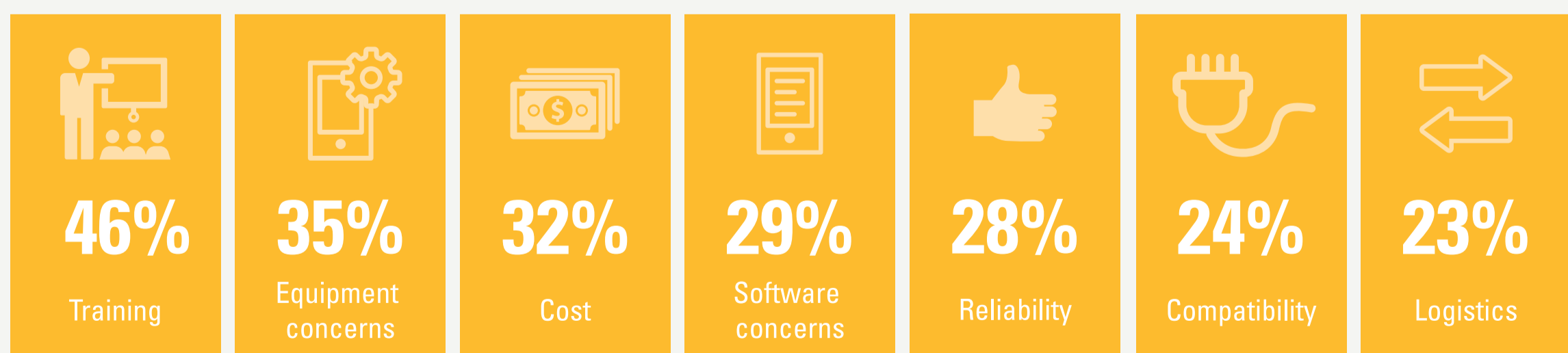
SPLIT DECISION

Utilities are almost evenly split over their plans to deploy tablets in the next 6-12 months



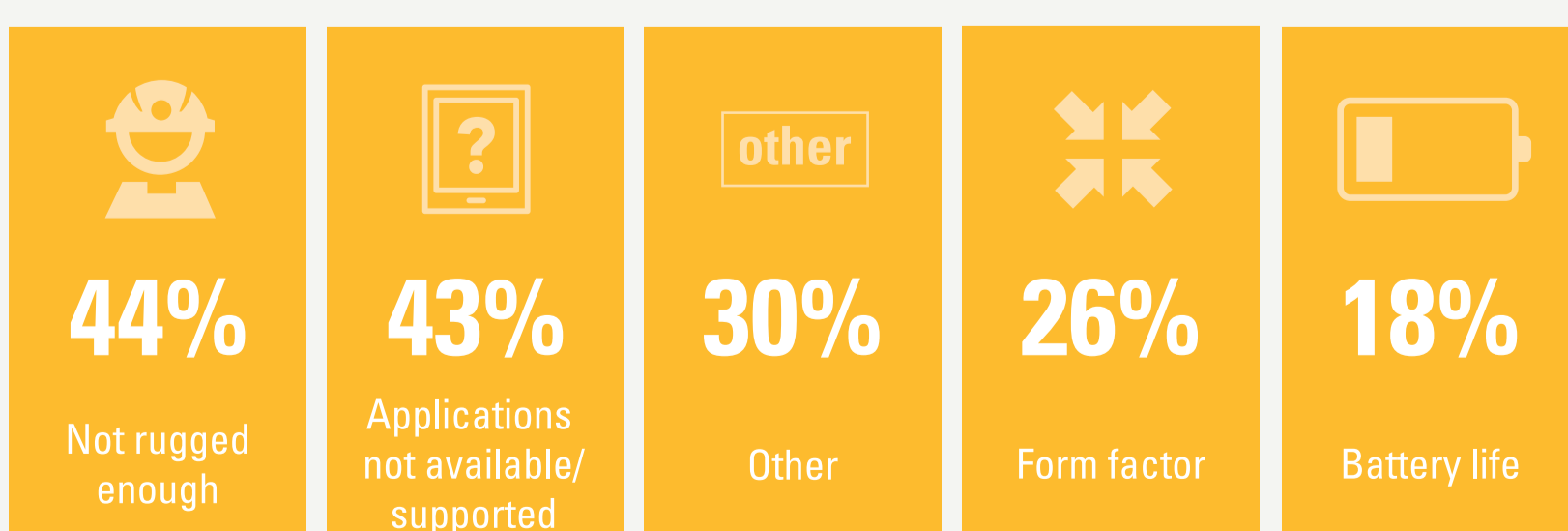
CHALLENGES FOR THE ADOPTERS

Among those who have already deployed tablets, these are the top challenges identified



BARRIERS TO ADOPTION

Field readiness and application support are most-often-cited as barriers to adoption



Source: PennEnergy Research survey of North American electric, gas and water utility companies. Some percentages don't total 100% because of rounding.