

Mobile Elite 2015 is the sixth wave in a series of surveys among business executives tracking the impact of mobile technology on their working patterns and lifestyles. The survey covers Europe, Asia and the US and captures over 500 online interviews across the three regions and provides regional results against a global average. Independent research agency MindMover managed the survey in Europe and the US, and GMI in Asia. The 2015 findings show mobile device saturation across the regions and a slowdown in the number of devices owned in the home. The results also highlight a significant increase in the volume and variety of news and business content consumed by global executives, and reveals an appetite among business executives to embrace new technology advancements as 'The Internet of Things, looks set to take centre stage within the connected home and workplace.

MOBILE SATURATION

Despite ownership of any mobile device remaining saturated in 2015, global Android smartphone ownership witnessed a slight decline from 54% in 2014 to 52% in 2015, but remained ahead of iPhone (49%). Blackberry experienced a huge drop from 17% to 8% year on year, mainly driven by Asia, where ownership more than halved from 24% to 11%. Windows phone also declined from 12% to 9% globally year on year. Turning to tablets, global iPad ownership increased from 49% to 51% year on year whilst Android remained stable at 33%. The global average number of devices owned in the home slowed in 2015, growing from five to six year on year. This slowdown is due to market overload, executives holding onto their devices for longer (as their needs are satisfied with their current devices), and a noticeable slowdown in mobile device hardware and software advancements in 2015.

SURGE IN NEWS AND BUSINESS CONTENT

In order to stay ahead of the game, access to up to date news and business information is a key priority for global executives. From a list of over twenty consumer and business content types, features and functions accessed on mobile devices in 2015, the consumption of 'business and financial information' shows the greatest year on year increase, with its ranking leaping from 8th in 2014, to 4th in 2015, behind navigation, email and downloading Apps. The variety and volume of news and business content consumed on mobile devices has increased across the board between 2014 and 2015, with access to 'news feeds' registering the highest growth for smartphones (45% to 60%), and 'watching video content' showing the highest increase for tablets (43% to 54%).

EASE OF ACCESS

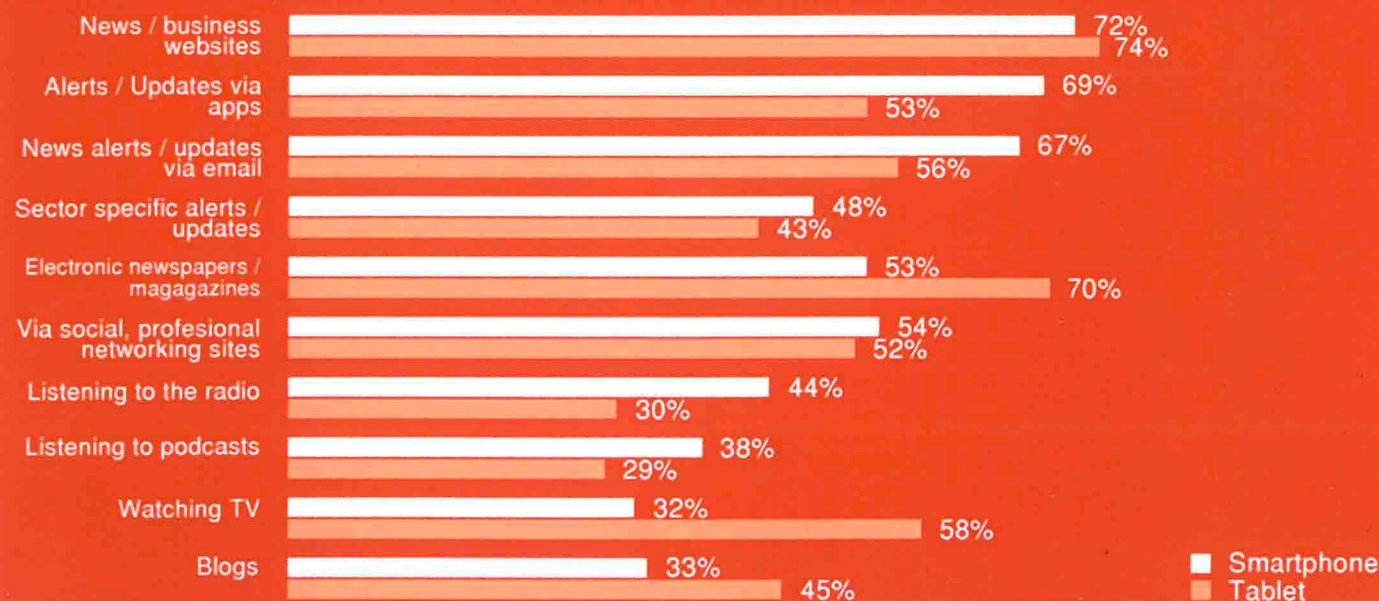
In 2015, 91% of global executives claim to access news and business content via their smartphone or tablet. Weekday morning is the most popular time (87%), as executives tap into the markets and prepare for the day ahead. Consumption of all types of news and business content increased in the morning with 'news video clips' and 'contacts/company profiles' registering the greatest increases 2014 vs. 2015. To satisfy this appetite for content in the morning, almost six in ten reach for their smartphone as soon as they wake.

Over six in ten global executives claim to consume news and business content over the weekend and the type of weekend content differs vs. the working week. Over the weekend, business executives have more time to delve deeper into subjects of interest, and consume more in-depth content. Top business content for the weekend includes 'in-depth articles' (38%), 'company information' and 'contacts/profiles' (both 35%). Weekday morning is focused on accessing financial content and the markets with 'stock prices' scoring highest (71%) followed by 'market open/close' (both scoring 69%).

The general increase in consumption of news and business information on mobile devices in 2015 is fuelled by ease of access, and the increased amount of content available. 'News and business websites' is the number one 'access point' for news and business content for both smartphones 72% and tablets (74%). With the number and variety of free and preloaded news alert services now on offer, 'news alerts'

via apps' 69% and 'via email' 67% are the second and third scoring 'access points' on smartphones, whilst 'newspaper and magazine apps' (70%) and 'TV' (58%) are the second and third highest scoring news and business 'access points' for tablets. See figure 1.

Figure 1: Global tablet vs smartphone access points



TV AND MOBILE HARMONY

Whilst TV is still considered the main platform for accessing business and finance news for just over half of global executives, the TV mobile combination plays a harmonious role in engaging consumers. In 2015, 75% claim to watch TV 'at the same time' as using their mobile device (up from 73% in 2014) and a growing proportion of global executives claim to have followed up on their smartphone or tablet as a result of seeing content on TV (56% in 2015 vs. 62% in 2015).

The type of action taken on mobile devices as a result of seeing news/business content on TV varies. Whilst 'purchasing products and services' via a mobile device remained stable year on year (54%), the proportion of global executives 'browsing for a product or service' after seeing news/business TV content increased from 69% in 2014 to 71% in 2015. 'Searching for information on a company or personality' also increased from 67% to 72% year on year.

SOCIAL SHARING

Membership of any social network among global executives dropped marginally from 97% in 2014, to 94% in 2015. However, individual membership of Twitter, LinkedIn and Facebook all increased in 2015. This can be explained by an upward shift in multiple-membership of all three sites growing from 28% in 2014, to 32% in 2015.

There are clear regional variations when looking at social media, with LinkedIn significantly stronger in Europe (68%) vs. Asia (46%) and US (54%). Twitter is also stronger in Europe, whilst Facebook is higher in Asia (84%), compared to Europe (67%) and US (64%). WhatsApp is also popular in Asia and Facebook's purchase of WhatsApp could be driving growth for both brands across all regions.

Social media is fuelling the consumption of news and business content in 2015 with 68% of global executives claiming to access news and business content via social networks on their mobile devices, increasing from 56% in 2014. Social media is also enhancing the relationship between TV and mobile in

2015, with half of all global business executives claiming to share news and business content seen on TV, via social media on their smartphones or tablets.

Social media is not only a useful tool for accessing and sharing news and business content, but it also has value from a business application perspective, with 77% of global executives considering social media to be a 'useful business tool' increasing from 75% in 2014. As global executives try to explore new ways to make profitable use of platforms such as LinkedIn, Twitter Facebook and Youtube, two thirds claim to have used social media for a variety of business applications in the last twelve months. This is highest in Asia (89%) compared to Europe (59%) and US (46%). Top scoring global actions include 'interacting with clients and customers' and 'building brand presence among social network communities' (both 31%) followed by 'tracking industry trends' (29%). Whilst in the US, almost all uses of social media in business increased year on year, most activities dropped in Europe and Asia, with the exception of 'building corporate reputation'.

MOBILE ECOSYSTEMS

Although smartphone hardware and software innovation appears to have slowed in 2015, the influence of mobile technology in the home continues to march on with 51% of global executives agreeing that 'The technology they use at home is more advanced than the technology used at work', increasing from 42% in 2014. Furthermore, almost four in ten now claim to use their mobile device to operate appliances within the home. The upward shift in the 'Internet of Things' and connected home technology will be fuelled by mobile devices and wearables in particular, and a growing number of global executives 'Like the idea of hands-free technology' (55% in 2015 vs. 51% in 2014). This trend is set to spread way beyond connected audio visuals, smart thermostats and smart security systems, and the connected home of the future is a technology Ecosystem that will track our work and leisure habits, follow our travel patterns, and learn our behaviour using sensors and data from devices and wearables.

The influence of mobile technology will continue to explode into other sectors such as fashion, health and fitness, travel, retail, automotive and luxury. 68% of global executives already agree that 'Mobile technology brands compete in the luxury sector' increasing from 57% in 2014 and as in-car technology becomes a primary consideration when purchasing a new car, an increasing proportion of global executives agree that 'Mobile technology is enhancing the driving experience' (57% in 2015 vs. 54% in 2014).

Moving onto retail and payment systems, the rise of Apple Pay and other digital wallet conveniences now enables consumers to purchase any product or service with their mobile devices or wearables at any time. It may not be long before wallets and debit cards disappear, as alternative payment currencies, systems and processes become the norm. This is endorsed by 74% of global executives who agree that 'Mobile payment systems are the future for e-commerce' (increasing from 68% in 2014).

In the travel sector, smartphones and tablets are fully integrated into the business trip routine, with 90% of global executives claiming to take their tablet with them when travelling on business (compared to 71% in 2014), and almost half (48%) use their smartphone as a boarding pass. This is highest in Asia (63%), compared to Europe (44%) and US (36%).

MOBILE DISORDER

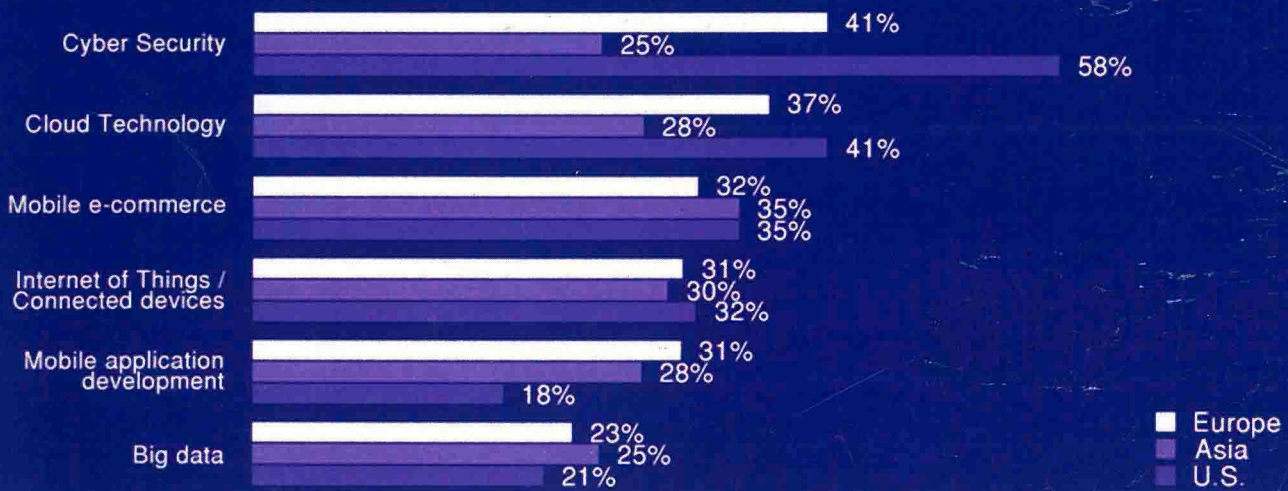
In 2014, the survey revealed how mobile technology is disrupting work-life balance - blurring the boundaries between the working week and weekend. This disorder is amplified in 2015, with six in ten global executives agreeing that 'Mobile technology is disrupting work culture, process, systems and structures'. The scale and influence of mobile technology change cannot be understated, with almost six in ten global executives agreeing that 'Mobile technology has more influence on global change than governments, countries or businesses'.

Despite the high levels of disruption caused by mobile technology developments, as global economic recovery appears to be taking hold, it's encouraging that 63% agree that 'My company is keeping up with

technology change' in 2015, increasing from 53% last year. In addition, three quarters of the world's business elite claim to be 'Keeping up with change within their sector'. This is highest in Asia (88%), followed by the US (70%) and Europe (64%).

Whilst global executives appear to be confident in their ability to keep up with change, the potential threats and negative effects of mobile technology on society, the economy, and workforce must be considered. Looking at concerns and priorities for the future, 82% of global executives agree that 'Data privacy and security of mobile devices is a growing concern'. Cybersecurity is an important issue for individuals and families, as well as for organizations, governments, and businesses. This is why 'Cybersecurity' was cited as the most important global technology influencer on businesses change for the year ahead (41%), followed by 'Cloud technology' (35%), 'Mobile commerce' (34%) and the 'Internet of Things' (31%). See figure 2. The importance of Cybersecurity was significantly higher in the US (58%), compared to Europe (41%) and Asia (25%).

Figure 2: Top global technology priorities in the next 12 months by region



SUMMARY

Mobile Elite 2015 reveals a significant surge in the volume and variety of news and business content consumed by global executives on their mobile devices. This is particularly true in the morning, where consumption of all types of news and business content showed positive year on year growth. Social media adds to the growing consumption of news and business content and continues to enhance the relationship between TV and mobile, with half of all global executives claiming to share news and business content seen on TV, via social media on their smartphones or tablets. With mobile device saturation coupled with a slowdown in the number of devices owned in 2015, it's clear that the mobile conversation is moving away from hardware and software developments towards mobile at the 'core' of technology advancements. Mobile Elite 2015 reveals an appetite among global executives to embrace new technology advancements and not only be 'early adopters' of change, but also be the 'early drivers' who will unlock the potential of mobile technology, as well as highlight the concerns and barriers for change into the future.