The Sustainability Gap

Breaking the Four-Year Technology Refresh Cycle

Foreword

> It's time for businesses to refresh their approach to buying technology for the mobile workforce. It's time to close the sustainability gap.

Sustainability is at the top of the agenda for most organisations and departments. Despite an increasing awareness of sustainability issues and a general desire to use computing devices for longer, we still see many businesses stuck in the four-year technology refresh cycle when it comes to the mobile workforce.

With new modular design and extended support available for the latest generation of notebooks and tablets, there's a real opportunity for businesses to extend the life of the technology used by the mobile workforce, simplify management, and improve total cost of ownership.

By engaging the workforce in pilot projects before purchase, buyers can ensure devices are much more closely matched to users' needs. Additionally, purchasing the latest modular devices allows users to customise their technology in the field.

Buying technology that adapts to your changing requirements, and later redeploying it for another purpose within the business, requires a mindset shift but has clear benefits. The ability to upgrade as required and the long-term extended support being offered by some manufacturers help to bridge the gap.

Combine this with the incredible CPU and memory performance available in the latest generation of devices, and there are many reasons to be optimistic. All the elements are now in place for organisations to extend the usability of their mobile computing equipment – by years in many cases.

We hope you find the insights from our latest research useful and that it helps your organisation break the four-year technology refresh cycle and close the sustainability gap.

Research Essentials

Opinion Matters independently surveyed 750 mobile technology buyers in companies of 50 or more employees for research commissioned by Panasonic TOUGHBOOK.

The companies spanned the utilities, emergency services, healthcare, logistics, manufacturing and construction sectors.

Key findings

## The four-year refresh cycle

IT buyers are stuck in a four-year cycle of refreshing their computing devices for the mobile workforce, despite increasing sustainability pressures suggesting devices could be used for longer.

Identifying and purchasing modular solutions means users can customise their devices in the field to meet varying requirements. It also allows the devices to be repurposed for another, later use within the business.

With the latest rugged modular computing devices equipped with powerful processors and memory that can easily be upgraded, businesses could be breaking the four-year technology refresh cycle by choosing longer-lasting devices.

**Over 56% of buyers expect to replace their devices every 1-4 years.**

❝ How often do you replace the computing devices for your mobile workforce?
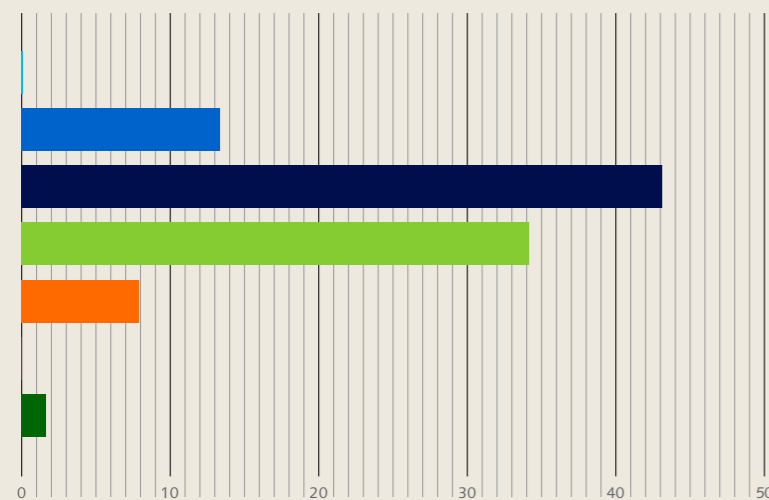
■ Less than a year	**0.0%**
■ Every 1-2 years	**13.3%**
■ Every 3-4 years	**43.1%**
■ Every 5-6 years	**34.1%**
■ Every 7-8 years	**7.90%**
■ More than every 8 years	**0.0%**
■ We do not/have not replaced the computing devices for our mobile workforce	**1.6%**

Mean: **4.24 years** (excl. "We do not /have not replaced the computing devices for our mobile workforce")

❝ How many years after product launch would you expect your device manufacturer to support your product?
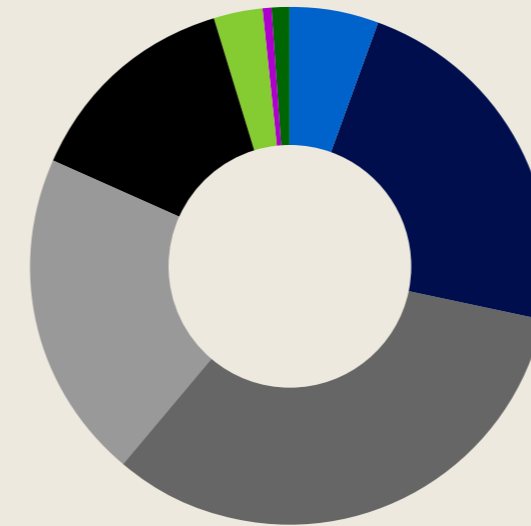
■ Less than a year	**0.1%**
■ 1 year	**5.7%**
■ 2 years	**22.7%**
■ 3 years	**32.8%**
■ 4 years	**20.5%**
■ 5 years	**13.6%**
■ 6 years	**3.2%**
■ 7 years	**0.3%**
■ I would not expect my device manufacturer to support my product after launch	**1.1%**

Full lifecycle support

IT buyers are still expecting device manufacturers to only support their mobile workforce computing technology for just over three years (3.22 on average).
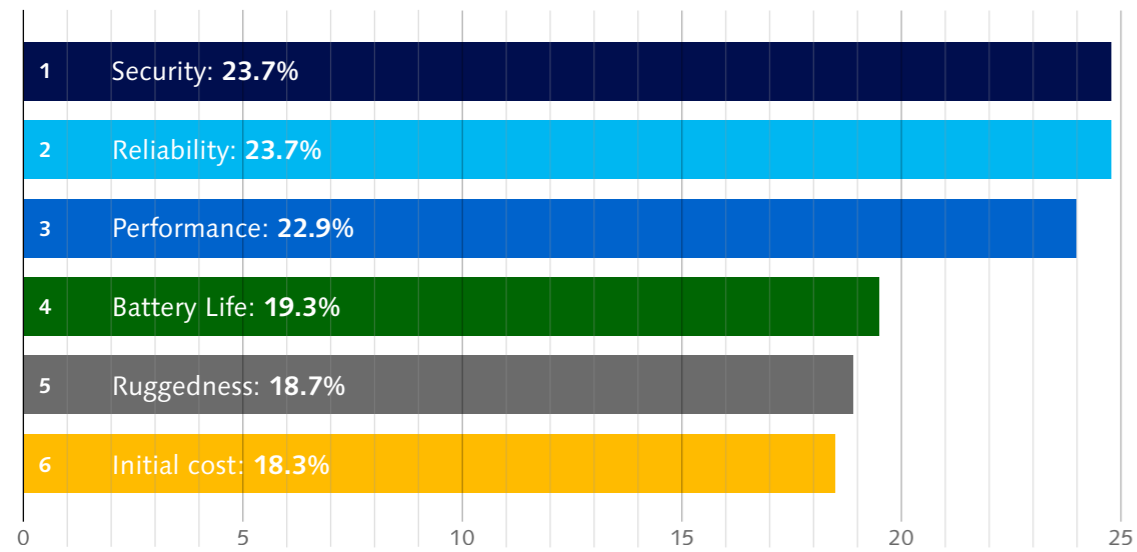
But providers such as Panasonic, designing for long-term sustainable use, are already offering support options for **up to five years after a product's launch** – significantly extending the secure and useful life of a device.

Main buying considerations

❚❚ What is most important to you when purchasing computing devices for your mobile workforce?

Rank	Consideration
1	Security: **23.7%**
2	Reliability: **23.7%**
3	Performance: **22.9%**
4	Battery Life: **19.3%**
5	Ruggedness: **18.7%**
6	Initial cost: **18.3%**

(Rank up to 5 in order of most important where 1 = highest importance)

It's no surprise that **security ranks joint highest alongside reliability** in terms of importance for IT buyers, with widely increasing organisational demands around both.

For those looking for a Windows device, Panasonic offers **Secured-Core PCs** designed for mission-critical users in the most sensitive data industries.

Users can boot securely, protect against firmware vulnerabilities, shield the operating system from attacks, and make use of advanced device and data access controls and authentication systems.

In addition, Panasonic offers its own suite of security technologies. A Trusted Platform Module (TPM) – a security chip included in all TOUGHBOOK Windows devices – increases physical and software security by making your device tamper resistant while combating malicious threats. Windows Hello makes use of biometrics such as fingerprint or facial recognition for safer, more personalised and efficient logins. And HF-RFID capabilities mean users can also use contactless smartcards for secure and convenient access.

Evaluating new devices for long-term use

Surprisingly, half of all IT buyers still do not pilot new computing devices with users before purchase. This increases the risk of missing vital ergonomic design or functionality requirements for the successful long-term use of the devices.

❚❚ How involved are your mobile workforce employees in the purchase decision for their computing devices?
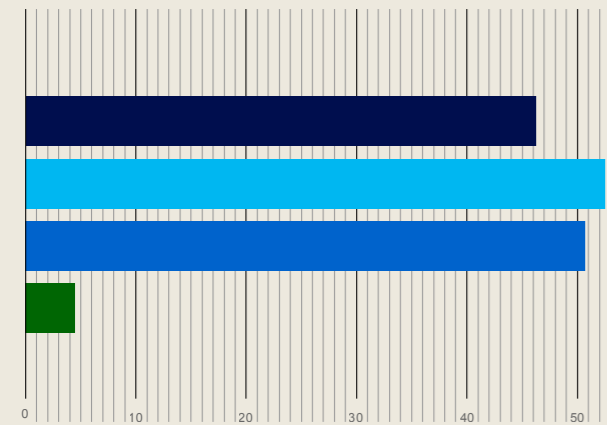
We ask for input on their needs **46.1%**

We engage users in the evaluation process prior to purchase **52.4%**

We always pilot new mobile computing devices for user feedback **50.4%**

We do not involve our workforce in the purchasing decision of their computing devices **4.4%**


FIRE AND RESCUE

Management headaches

Overseeing the volume and variety of devices deployed to mobile workers can be a headache for IT departments. On average, organisations manage between 2-3 different types of mobile computing, ranging from laptops and tablets to mobile workstations and wearables. This is especially true for manufacturing, emergency services and logistics sectors that need rugged agility on the go.

A key benefit of a modular design is that the main components of a device remain standardised, enabling efficient and effective updating and management across the workforce. This helps to extend the life of your technology, maintain productivity and save valuable time and resources.

❚❚ On average, how many device types does your IT team or outsourced partner support within your business?
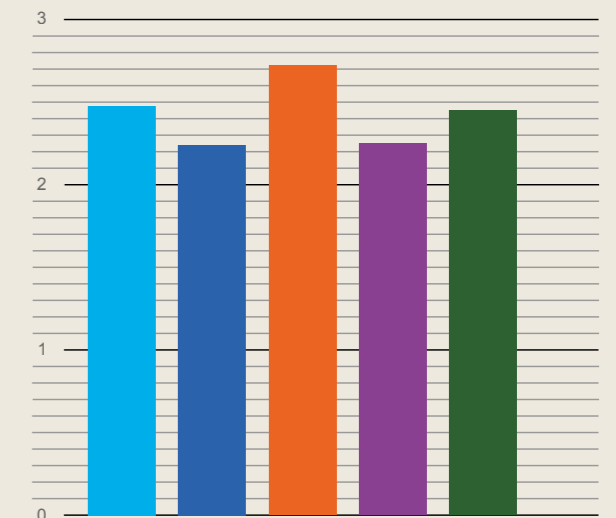

Logistics **2.48**

Emergency/ Healthcare / Care Services **2.34**

Manufacturing **2.72**

Utilities **2.24**

Construction **2.45**

BIOS, firmware and driver updates

Recognising the increasing awareness for security, **around 70% of respondents considered regular BIOS, firmware and driver updates important**, with the average updates happening between 2.5 and 3 times a year and taking an average of 4 days a year to implement.
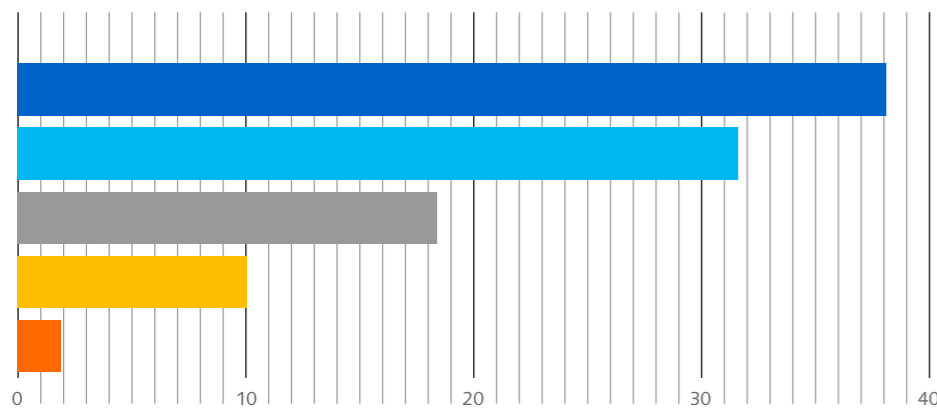
❙❙ How important are manufacturing updates for the BIOS, Firmware and/or Drivers of a device?
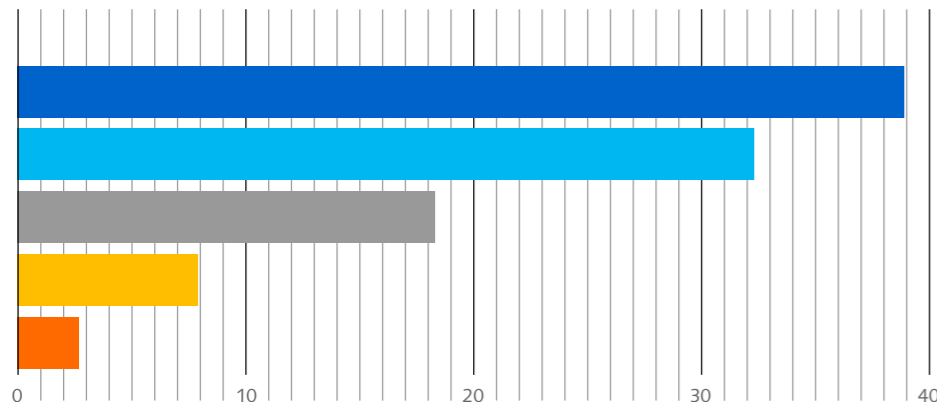
BIOS
Important net **71.2%**
Not important net **10.5%**
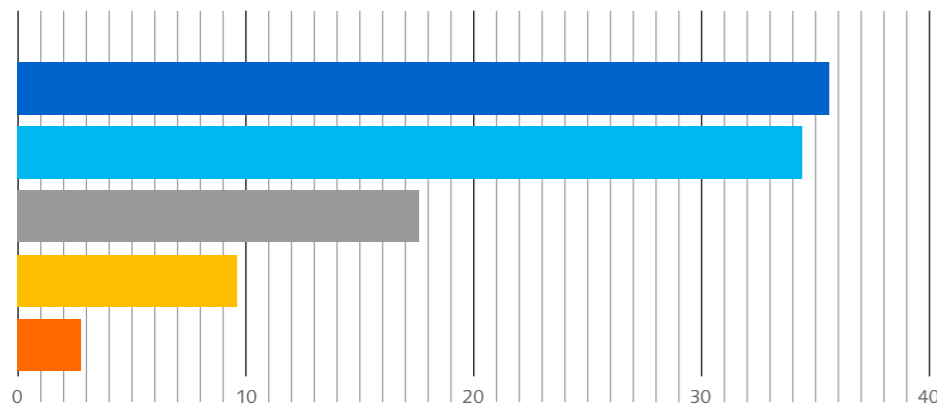
Firmware
Important net **70.0%**
Not important net **12.4%**

Drivers
Important net **69.7%**
Not important net **11.9%**

■ Very important   ■ Important   ■ Neither important nor unimportant   ■ Neither important nor unimportant   ■ Not important at all

Upgrading end-user systems in the enterprise can be daunting. It can introduce unexpected driver variations from previously qualified platforms, adding image management complexity while increasing hardware support costs. That's why Panasonic only offers Intel vPro® Enterprise CPUs in its Windows devices with the Intel® Stable IT Platform Program (Intel® SIPP). It features an extensive validation program that aims for no hardware changes throughout the buying cycle, for at least 15 months or until the next generational release.

Fewer hardware changes mean fewer hassles and interruptions for users, resulting in a more seamless overall experience – especially for PC setup and configuration, and PC image deployment.

In addition, Intel validates multiple versions of Windows on any given generation of the platform. This helps businesses better manage OS transitions and take advantage of extended support from Microsoft for any new release.

Conclusion

Organisations should be considering ways to increase the sustainability of their mobile computing devices by breaking the four-year technology refresh cycle. Key considerations are:

✔ Identifying a manufacturer that can offer the full range of rugged and modular notebooks and tablets required to meet the varying needs of the mobile workforce.

✔ Engaging the workforce in hands-on pilot projects to ensure the ergonomic design, functionality and ruggedness of the devices are suitable for the long-term requirements of the business.

✔ Standardising on a modular architecture with easy-fit, click-in accessories and adjustments to customise devices for the changing needs of the user or the organisation – significantly extending the life of the device and simplifying its management.

✔ Choosing a manufacturer that commits to regular security, firmware and BIOS updates and provides Microsoft Secured-Core PCs.

✔ Ensuring extended five-year support for devices and extended warranty options for peace of mind.

Designed for sustainability and easy management

Panasonic has recently expanded its range of rugged modular laptops and tablets with the updated TOUGHBOOK G2 rugged tablet, the TOUGHBOOK 55 rugged laptop and the launch of the TOUGHBOOK 40 – the ultimate rugged notebook. The latter is a 14-inch modular device ideal for the most demanding sectors such as Defence and Mining.

To ensure the security and longevity of devices, Panasonic TOUGHBOOK supports its range of devices for up to five years*. A range of ProTect warranties can also be included to help extend the life of your devices and provide ultimate peace of mind.

*4 and 5 year extended warranties are optional

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