



The Future of Field Operations

A Look at the Energy and Utilities Sector through 2025



In-depth insights and analysis on how mobile is defining the energy and utilities sector

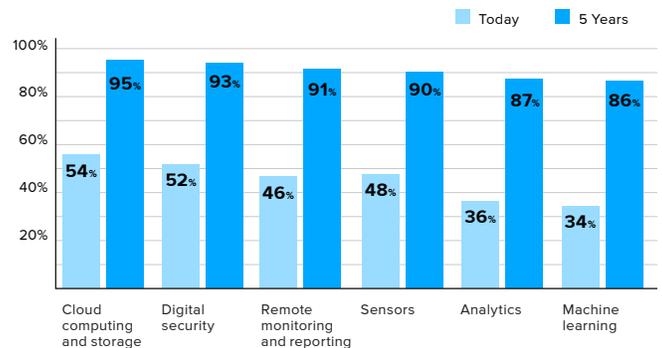
The Future of Field Operations: A Look at the Energy and Utilities Sector Through 2025 provides unique data collected from more than 300 decision makers on mobile technology usage, operational pain points and future trends in the industry.



A look ahead at the energy and utilities sector

As the energy and utilities sector continues to evolve, some of the trends that will emerge over the next five years are beginning to take shape. While seven out of ten companies report utilizing advanced analytics and machine learning to create work schedules that maximize their resources in the field, the use of predictive and advanced analytics is still expected to rise. Remote monitoring and reporting, cloud computing and several other innovative technologies are also expected to become staples of the industry in the next few years.

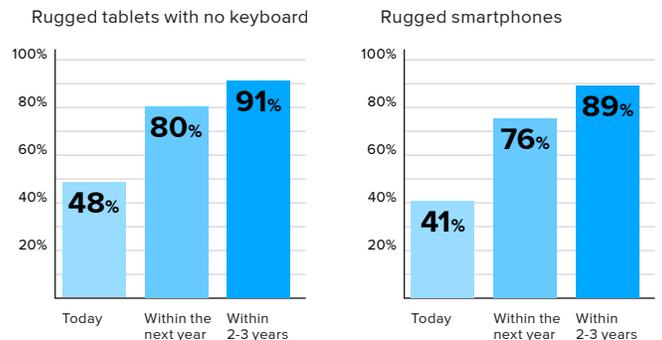
Technology changes over the next 5 years



Rugged devices are the preferred choice in the industry

The energy and utilities sector is seeing the value of rugged mobile devices. Today, nearly 50 percent of companies have begun using rugged tablets, and are expecting that number to rise to 80 percent within the next year. In addition, 89 percent of respondents say their mobile strategy will involve using rugged smartphones within the next three years.

Implementation of rugged devices



Barriers to success for field technicians

Inclement weather. Late dispatch calls. Safety hazards. Field technicians need to work safely in difficult conditions and circumstances to ensure customers receive uninterrupted service. Knowing what they view as the top challenges can help you select the right tools to keep them safe, help them work faster and perform effectively.

Improving safety and quality of life while reducing operating costs

The expectations businesses and customers have for the energy and utilities sector have never been higher. They demand uninterrupted service and won't tolerate outages, which makes the ability to connect from anywhere, at any time, a critical component for your field technicians' success. As ongoing developments in 4G and 5G lead to greater investments in wireless devices from companies who want to remain competitive, the industry is seeing the increased value of mobile technology for its people and the bottom line, as well.

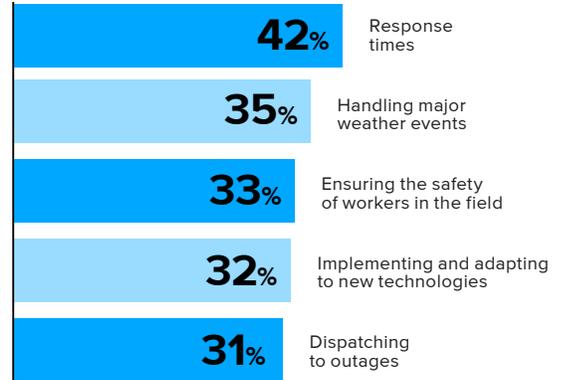
The top 3 benefits of mobility solutions

Reduced operating costs **46%**

Increased worker satisfaction **44%**

Decreased liability exposure **38%**

Top 5 challenges facing energy and utilities



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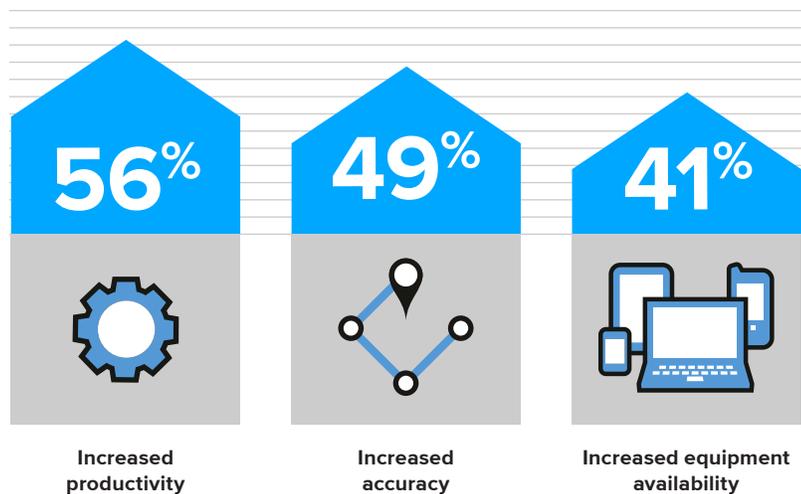
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Productivity solutions

Mobile technology is changing the standard for success across the industry by giving workers more options in the field and helping them increase their efficiency.

Mobile streamlines efficiency

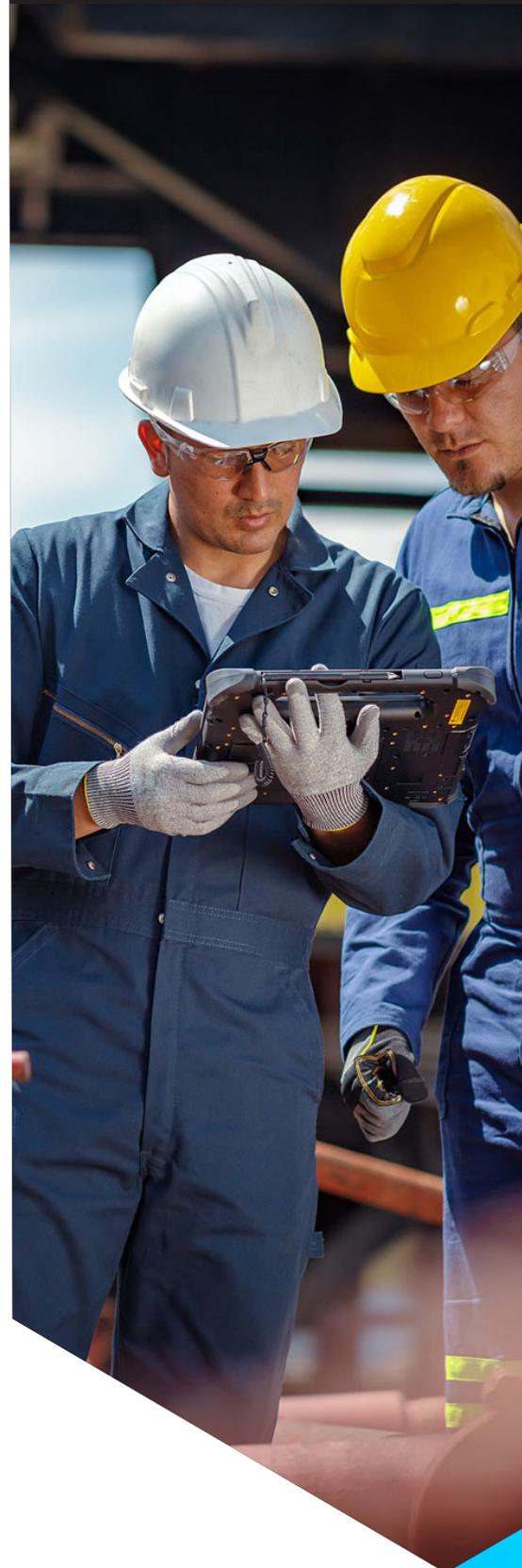
Companies who implemented mobile devices achieved:



A shift in philosophy

The number of companies who equip more than half of their field technicians with mobile devices is expected to rise by 17 percentage points over the next five years. That's not all—the industry is already evolving its mobile usage, with organizations transitioning from a merely responsive approach to a proactive one.

73 percent of companies in the energy and utilities sector now consider themselves mobile-first businesses.



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The most important applications in the industry

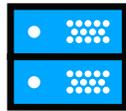
Reliance on paper-based methods is fading away as mobile-first organizations have turned their attention towards making things simpler for users, allowing them to improve productivity and stay safe in the field. One of the most common shifts throughout the industry has been the widespread use of applications to access real-time data and make communication and navigation more efficient.

In addition, industry specific-applications that perform supervisory control and data acquisition (SCADA) and geographic information systems (GIS) are catching on quickly. Currently, 46% of those surveyed have implemented SCADA and 54% are using GIS. Within the next year, another 29% will implement SCADA and 27% more will utilize GIS.

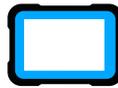
The most common functions among application users ranked by importance



Mapping/navigation



Real-time database access



Email



Accessing supervisory control and data acquisition



Utilizing geographic information systems

The mobile solution

Field operations play a critical role in meeting the increasingly high demands of energy and utilities customers. Companies throughout the sector have realized the best way to set themselves up for success is by turning to mobile solutions. Equipping field technicians with mobile devices has paid huge dividends, and we should expect to see the trend of companies relying on this technology accelerate into the future.

How mobile is transforming the energy and utilities sector

- Mobile has enabled field technicians to be more productive, reach their destinations more quickly and solve issues faster
- Companies who use mobile have reduced their operating costs in the field
- Field technicians are exposed to less risk when using mobile because they have access to more information to help them make safer choices while performing their jobs
- The sector will become even more technology-driven, as nearly 90% of agencies plan to implement cloud computing, analytics and remote monitoring within the next 5 years

Find a rugged mobile solution for your business at www.zebra.com/utility



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About Zebra

Zebra is the industry leader in ruggedized mobile computing solutions for the energy and utilities industry. Our technology enables professionals in the field to connect from the most remote locations and access the data they need to perform their jobs more efficiently.

Learn more at zebra.com/utility