

The Untethered Executive:  
**BUSINESS INFORMATION IN  
THE AGE OF MOBILITY**



## KEY FINDINGS

- **Smartphones are second only to laptops in the executive's arsenal of devices.** While 87% of executives use a laptop, 82% indicated they have some kind of smartphone. Interestingly, more than a quarter (28%) have both a BlackBerry-type device and a smartphone with an HTML browser (such as a Droid or an iPhone).
- **Many executives utilize a full array of devices for business purposes.** On average, respondents had 3.46 devices each; CEOs (4.21 devices) and CFOs (4.22 devices) had the most.
- **Most executives still think of their computers as their most important device;** more than eight in ten use their laptop (45%) or desktop (37%) computer most frequently for business purposes. A sizable minority—12%—use their smartphone most often.
- **More than half of senior executives agreed that their mobile device is now their primary communications tool.** Among executives under age 40, 73% see their mobile device as more critical to communications than their landline.
- **Executives are making purchases on their mobile devices.** Nearly two-thirds indicated they're comfortable making a business purchase on their mobile device, and more than half would rather make a business purchase on the mobile Web than over a phone.
- **Younger executives have a much greater proclivity to take advantage of mobile tools.** While older executives still let the device rule the task, younger executives (those under age 40) are increasingly becoming device agnostics, less concerned about what device they're using than what they need to get done.
- **Senior executives can be reached through mobile ads.** More than half "notice" mobile advertising, and click on mobile Web ads and mobile paid searches. Younger executives are significantly more likely to take these actions than older ones. Executives under age 40 also are much stronger users of mobile apps for business.
- **All signs point to a mobile future.** 45% of senior corporate executives said they believe a smartphone or Web-enabled tablet will be their primary device for business-related use within three years.

## The untethered executive

The concept of the corporate executive sitting down at a desk to read or respond to email is almost as quaint as an accountant crunching numbers while wearing a green eyeshade. Mobile communications—in the form of smartphones, tablets, and other Internet-enabled devices—are fundamentally altering the way executives interact with business information. These devices don't simply untether the executive from the office, but provide a way to access essential work-related content irrespective of location or circumstance.

Much has been written about how smartphones and other mobile devices are changing the way people communicate. But little has been done to understand what the impact of this shift is on the executive suite. Are executives willing to use their smartphones for business purposes beyond email? Is the information they access via a mobile device being used to help drive business decisions? Do different “generations” of executives treat mobility differently, and are some more willing than others to blur the lines between business and personal communications devices?

To gain a better understanding of how executives are approaching mobility, Forbes Insights, in association with Google, surveyed more than 300 executives at large U.S. companies (more than \$500 million in annual revenues).

The goal of the survey was *not* to find out how companies are approaching mobility, but rather to gain a clearer picture of how the executives themselves are using both mobile devices and desktop/laptop computers to gather and filter the business information they need for their jobs.

In addition to the survey, one-on-one interviews were conducted with nine senior-level executives at these large businesses to gain deeper, first-hand insights into how they're tackling business information.

This study serves as a mobile-focused follow-up to 2009's *The Rise of the Digital C-Suite*, a study published by Forbes Insights (also in association with Google) that found that how executives use the Internet for business purposes frequently depends on the age and work experience of the executive.

Generational differences also help define how executives are using mobile devices in their information-gathering mix. While it may not have a categorical impact on device ownership, it does help determine how they are using the devices to gather information, or, for that matter, whether or not the device drives the information-gathering task. Throughout the study, we'll be examining the findings with this generational filter, as appropriate.

## Digitally dating multiple devices

*“Wherever I go, I always carry a BlackBerry—and just in case, an iPhone. And if I’m on the road, which is at least half the time, you can add an iPad and a laptop—I always have both.”*

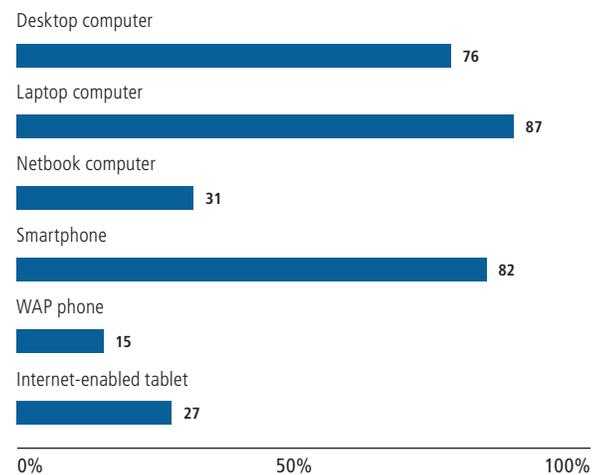
—Loren Ridinger, SVP and co-founder, Market America

It’s no secret that smartphones—sophisticated mobile devices that are essentially pocket-sized computers with access to the Internet—may be the fastest-growing hardware platform. About 58.7 million people owned smartphones during the three months ending in September 2010, a figure that grew 15% from the previous quarter, according to comScore. Driven by increasingly powerful and innovative mobile applications, the mobile Web is quickly becoming a key information channel, both for personal and business communications.

More importantly, smartphones have become ubiquitous in the executive suite. They’ve become the executive’s omnipresent digital companion. But with the wide range of devices they have at their fingertips, executives are still just digitally dating—they’re not willing to commit to one device...at least not yet.

In the Forbes Insights survey, executives were asked to select the devices they use for business purposes from a list of seven possibilities, ranging from traditional laptop and

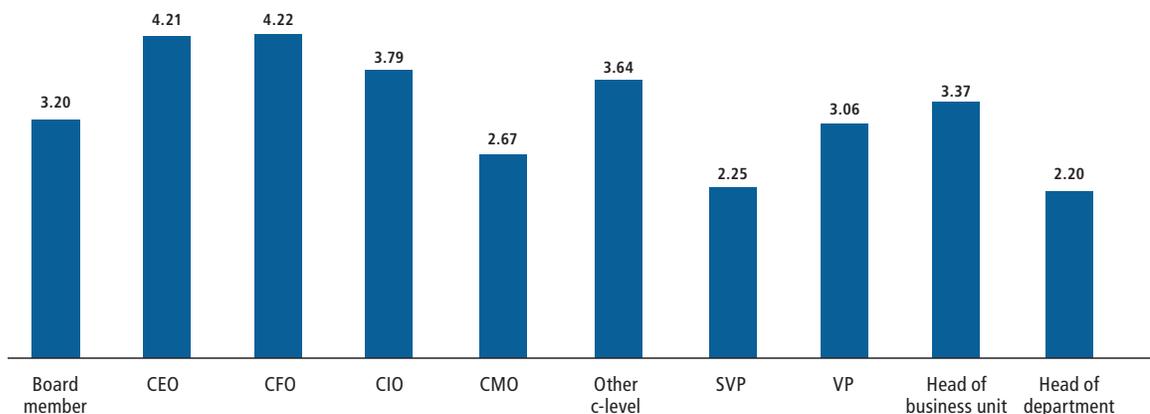
FIGURE 1: Which of the following devices do you currently use for business purposes?



desktop computers to smartphones (both Internet-enabled ones such as the BlackBerry, and ones with full HTML browsers such as the Droid or iPhone) and emerging mobile technologies such as Internet-enabled tablets.

The most prevalent device for executives is a laptop, but smartphones are a very close second. (Fig. 1) Among

FIGURE 2: Average number of devices (by job title)



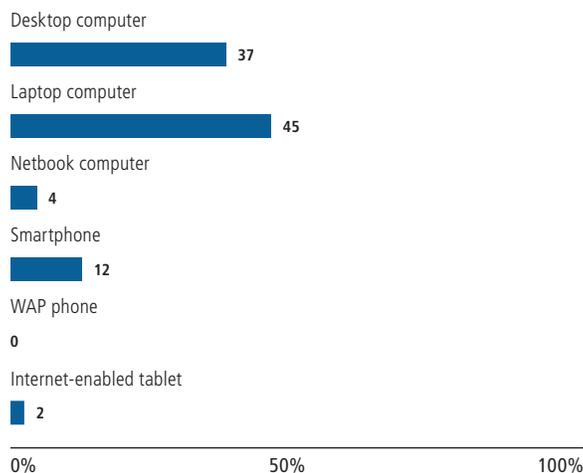
respondents, 87% said they used a laptop computer for business purposes, while just 76% use a desktop PC. As Jim Compton, chief revenue officer at United Airlines, noted, “It almost makes no sense using a desktop today when you can use a laptop with a docking station.”

More executives use some sort of smartphone (82%) than use a desktop PC. Interestingly, since the survey asked them to differentiate between Internet-enabled smartphones and those with full HTML browsers, it turns out that more than a quarter of respondents (28%) have both a BlackBerry-type device and a smartphone with an HTML browser.

In fact, most executives utilize a full arsenal of devices for business purposes. Respondents in the survey had an average of 3.46 devices each. (Fig. 2) Breaking this down by job title, CEOs (4.21 devices) and CFOs (4.22 devices) had the most. It’s no wonder many continue to play the field.

Still, most executives think of their computer as their most important device; more than eight in ten use their laptop (45%) or desktop (37%) computer most frequently for business purposes. (Fig. 3) But a sizable minority—12%—currently use their smartphone most often.

**FIGURE 3:** Which device do you currently use most frequently for business purposes?



### A SMARTPHONE IS STILL, PRIMARILY, A PHONE

Most senior executives, to some degree, are road warriors. But relatively few can lay claim to the degree of mobility demonstrated by Ingrid Van Den Hoogen, CMO of audio communications specialist Plantronics. Though her home is in Alaska, the executive spends about equal time at corporate headquarters in Santa Cruz, CA. This is to say nothing “of the many visits to customer sites” and other “corporate travels,” said Van Den Hoogen.

On the road—and at home—Van Den Hoogen relies on a laptop, primarily “because I do a lot of work on PowerPoint, and the screens on (other devices) just aren’t large enough.” Still, she said her most important device is her smartphone with an HTML browser. And though the device is useful in terms of its ability to help manage email, its real utility, said the CMO, “is voice—I positively live on the telephone.”

According to Van Den Hoogen, too many executives rely on email when they should be engaging in more “live” conversation. “It’s too easy to be taken the wrong way in an email,” she said. “You can’t hear the other person’s reaction or you don’t take the time to give the context of your view or your decision.” The ability to communicate via voice, said the executive, “is the real power behind” a mobile device.

## The need to be nimble

*“At the end of the day, we’re only as good as the quality, accuracy, and speed of our decision making.”*

—Mike Hedges, CIO, Medtronic

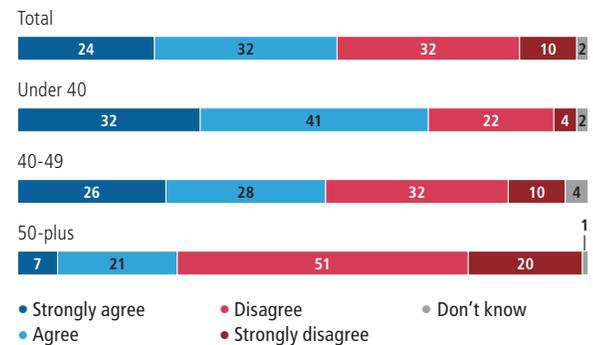
In an era of intense global competition, time is of the essence. Senior executives realize that the speed and quality of their leadership are what drives corporate performance. Tasks won’t wait, nor will essential communications, simply because the executive is in a meeting, on the tarmac, or even on the beach.

Device-enabled mobility both enables and exacerbates time-based competition. At the same time, it blurs distinctions between when an executive is at work and when he or she is at home. As Plantronics CMO Ingrid Van Den Hoogen explained, “I find the technologies available today actually enable people to strike a better work-life balance.” Specifically, said Van Den Hoogen, though executives tend to be checking in on work and making themselves available more often, “overall, these technologies afford unprecedented freedom.”

### MOBILITY ON THE MOVE

And just as the laptop has overtaken the desktop, so the mobile phone has now overtaken the hard-wired office telephone. A mobile device is now the primary communications tool for well over half (56%) of all executives. (Fig. 4)

FIGURE 4: My mobile device is my primary business communications tool.



### A WORKAHOLIC’S LOVE AFFAIR WITH MOBILE

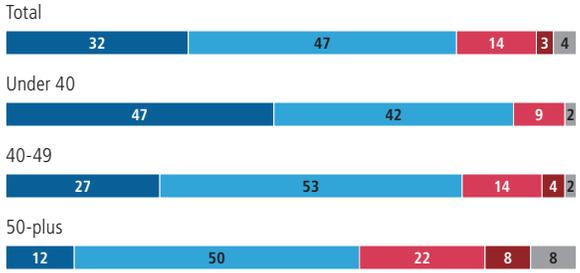
Loren Ridinger, SVP and co-founder of the Internet brands promoter Market America, is a self-described “road warrior,” “workaholic,” and “technology junkie.” She is never without an array of mobility-enhancing devices.

Moreover, because her company is all about brands, brand promotion, and informing customers and sales associates about the “latest and greatest” products, Ridinger is a prolific producer to Internet content. “I’m on the road at least half the time,” she said. “And if I find I have 30 minutes, a lot of times I’ll just sit down, pull out my laptop, and fire off a blog entry.” Or alternatively, said Ridinger, “I’ll connect a microphone, turn on the webcam, and upload a message or a product update.”

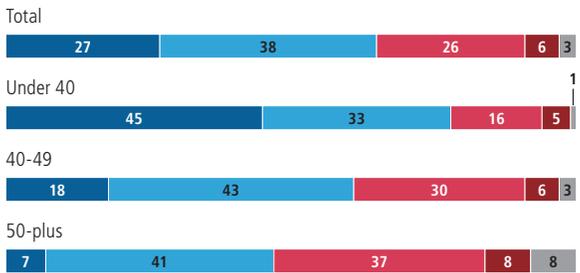
Overall, when it comes to product promotion and building a business, the executive is huge believer in technology. “Let’s face it, a lot of people are pretty good at selling one on one. But the thing is, I love to reach the masses.” And the best way to do that today, said Ridinger, is by connecting with others through the full range of blogs and related social media. All day long, “I’m posting or talking about where I am, what I’m doing, and what’s coming out,” she said. “You need to recognize, in the past it might have taken millions of dollars to create a brand, but in today’s society you can do it all on the Internet with a laptop and a BlackBerry.”

**FIGURE 5:** Executives become comfortable with mobile

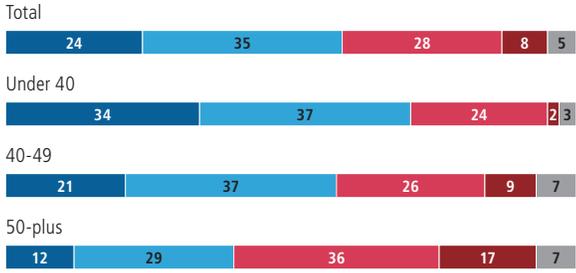
**I am comfortable providing business contact information to a mobile website.**



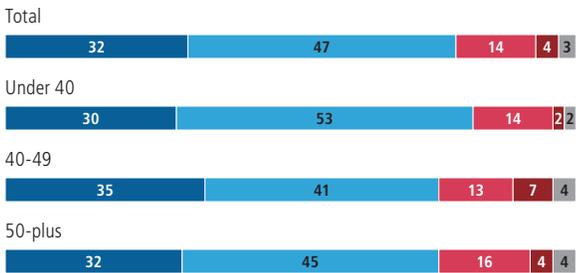
**I am comfortable making business-related purchases on a mobile device.**



**I would rather make a business-related purchase over the mobile Web than over the phone.**



**When I research a product or service on my mobile device, I prefer to make a purchase on my computer.**



● Strongly agree     ● Disagree     ● Don't know  
● Agree             ● Strongly disagree

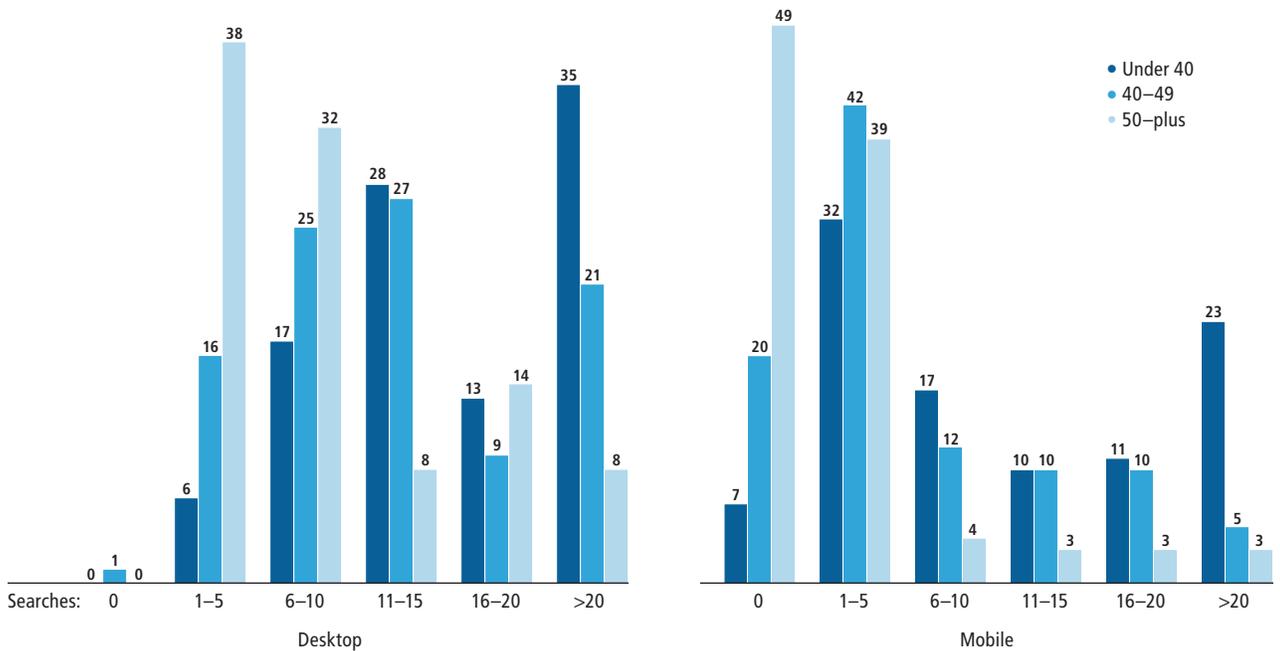
The popularity of these new devices is particularly evident among senior executives under age 40, where the percentage of those who view the mobile phone as their primary communication tool reaches 73%. By contrast, among executives age 50 and older, the figure is only 28%—providing the first glimpse of a range of evidence that shows younger executives are decidedly more mobile and more digital.

This desire for speed, mobility, and flexibility is accompanied by an already pronounced, yet strengthening, willingness to conduct all manner of business mobilely. Nearly eight in ten senior executives, for example, are

willing to leave their contact information on a mobile website. (Fig. 5) Similarly, 65% of senior executives agree (38%) or strongly agree (27%) that they are comfortable executing a business purchase on a mobile device.

Executives are so comfortable with mobile, in fact, that 59% noted they would rather make a business purchase on the mobile Web than over the telephone. That said, having researched a product or service on their mobile device, 79% indicated they still prefer making the ultimate purchase on their computer.

FIGURE 6: Executive search habits (number of daily searches by age and device)



**MOBILE SEARCH**

As mobile usage proliferates and as executives become more comfortable with these devices, it can be reasoned that the number of mobile searches will also rise. Anecdotal evidence to this effect is strong. Note that the 2009 *Rise of the Digital C-Suite* study showed that senior executive, on average, conducted six Internet searches per workday. But this year, the number of such searches doubled to 12—just on their computer. (Fig. 6)

Meanwhile, this year’s survey also asked about the number of mobile searches. At an average of seven mobile searches per day, the number of mobile searches today is, in fact, greater than the number of total desktop searches a year ago.

Again, differences by age group are profound. For example, 23% of executives under the age of 40 perform 20 or more searches a day from their mobile devices, compared to only 3% of those over age 50 who conduct that many.

**HOW MOBILITY TRANSFORMS CUSTOMER INTERACTION**

Mobile technologies are transforming how medical device maker Medtronic is able to meet customer needs, according to James Dallas, the company’s senior vice president of quality and operations. “Physicians and hospitals, our customers, what they need from us is the ability to make better decisions faster,” he said. Mobility can drive that shift.

That is one reason why Medtronic has been equipping its customer-facing employees with tablets—in June 2010 the company bought 4,500 iPads for that purpose. “We’re able to share details of products in a faster, more visually engaging way. It takes about two seconds to load the video and text needed to get a good understanding of the product,” Dallas said.

## Early adopters and power users

*“I’ve been telecommuting from Alaska to California for several years now. It’s a lifestyle I embrace, no matter what device I happen to be using at any particular moment.”*

—Ingrid Van Den Hoogen, CMO, Plantronics

While senior executives as a group are both digital and mobile, throughout the research—in virtually every question tallied—the younger the executive, the greater their proclivity for taking greater advantage of mobile tools.

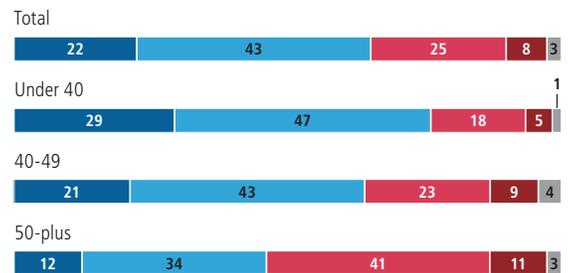
As “digital natives,” these younger executives are fluent in the language of mobility, treating it as seamlessly as they do Web browsing from a computer. This fluency has the potential, in many cases, to turn these younger executives into device agnostics—they may use a mobile device or a computer for many tasks; it really depends on what’s at hand.

Older executives, on the other hand, still allow the device to drive the task. For many, smartphones are for talking first since they still think of them as extensions of their older cellphones. The idea of using them for data-centric tasks has not yet made it into their business “muscle memory.”

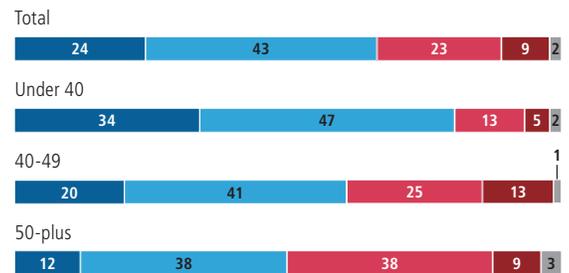
A good example is a series of questions testing attitudes towards preferred modes of interaction while “on the road.” When mobile, 65% of senior executives would rather deal with customers, business partners, or vendors via text messaging or email than by voice. (Fig. 7) However, these statistics distill to 78% of executives under 40 versus only 46% of those 50 or older.

FIGURE 7: Interact by email or phone?

**When I am on the road, I would rather interact with customers/ business partners/vendors via email or messaging than over the phone.**

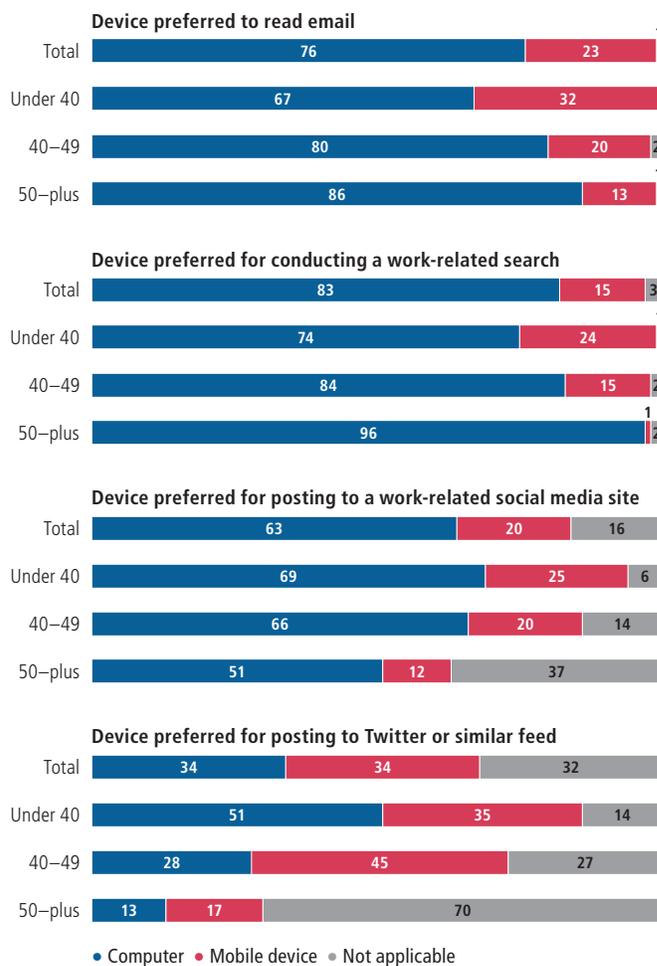


**When I am on the road, I would rather interact with work colleagues via email or messaging than over the phone.**



● Strongly agree      ● Disagree      ● Don't know  
● Agree                ● Strongly disagree

FIGURE 8: Device preferences for work-related tasks.



Similarly, when mobile, 67% of senior executives overall prefer to deal with work colleagues via text messaging or email than via voice. But again, the figure is much higher for those under 40 (81%) than for those age 50 and up (50%).

### TASKS, NOT DEVICES

Younger executives also display a significantly greater willingness to be device agnostic. That is, their behavior may be driven less by the device available and more by the task at hand. As the capabilities of devices improve—as technologies achieve greater convergence—this trend will likely lead to a willingness to rely on fewer, albeit more powerful, devices.

As evidence, executives were asked which devices they preferred for certain tasks. (Fig. 8) In terms of reading email, 76% of executives overall tend to prefer their computer, and 23% prefer their mobile device. But among those under 40, 67% prefer computers and 32% prefer mobiles. For executives over 50, 86% prefer computers, and 13% prefer mobiles.

The differences are more pronounced when it comes to business-related searches. Overall, 83% of senior executives said they prefer to use a computer to execute such searches, and 15% prefer their mobile device. Among those 50 and up, the percentage preferring computers swells to 96%, and just 1% prefer searching via their smartphone. But among those under 40, only 74% turn to their computers while 24% prefer their mobile devices. Without question, younger executives are much more comfortable performing tasks of increasing complexity on any device at hand.

### DIGITAL CREATORS VERSUS DIGITAL CONSUMERS

Generational differences are also evident in terms of willingness to create digital content—as well as the means for that creation.

Nearly two-thirds (63%) of all executives indicated they prefer using their computer to post material to a work-related social media site. But in this case, it is not the choice of devices that matters so much as it is the number of executives who are even performing such tasks. More than a third (37%) of executives 50 or older said this task isn't even applicable to their working habits. By comparison, among

those under 40, only 6% said the task isn't applicable. The inescapable observation is that relative to older peers, the younger executives are far more likely to be creators, and not merely consumers, of content.

The differences become even more pronounced when it comes to posting to Twitter or similar social feeds. Even with Twitter's increasing reach, 70% of older executives don't consider creating this kind of content applicable, compared to only 14% of those under 40. These younger executives are active contributors to the service, and fully 35% prefer to do it via their mobile device.

### LIFE ON THE MERGER ROAD

Working "to merge two airlines—one based in Chicago and the other in Houston—makes you very mobile," said United EVP and chief revenue officer (CRO) Jim Compton. Charged with optimizing the newly formed company's revenue streams, the executive needs to stay in nearly constant contact with five key areas: marketing, sales, pricing and revenue management, scheduling, and partners in the Star Alliance.

"I receive hundreds of emails" on any given day, he said. Of course, some are more important than others. For example, the executive might be receiving an update on a storm track "which would have an impact on our operation," said the executive. So regardless of where the executive might be at any time, "I need to be connected, in touch, at all times."

Owing to the ongoing integration of the two airlines, Compton today is spending "a great deal of time" in both Houston and Chicago. Not surprisingly, he said, "I'm getting used to hauling around a lot of technology." Specifically, the executive carries an Internet-enabled smartphone (BlackBerry Torch), a laptop (which docks into servers in both cities), and of late, an iPad tablet.

The tablet, a gift from the executive's wife, was originally intended as a way to stay in touch with family and friends during the airline's transition. "It's great for sharing photos and keeping in touch," said Compton. However, increasingly, "I'm finding more ways to use it for business." In particular, the device proved useful for showing other executives and interested parties the new corporate logo. "Sharing the image on a (smartphone) versus a (tablet), there's just no comparison. The (tablet) is a great tool for sharing visuals," said Compton.

# Reaching executives through mobile ads

*“Only if it’s relevant would I consider clicking on a mobile ad. Something would have to be completely relevant.”*

—**Marcus Glover**, Assistant General Manager, Harrah’s Casino, St. Louis, MO

Potentially lucrative customer interactions await. Survey respondents indicated they are willing to interact with mobile advertising and messaging, but they remain quite sensitive to relevancy. While mobile ads have long promised offers based on location and context, executives want this marketing to live up to its promise in order for them to engage with the media fully.

In the survey, well over half of senior executives (57%) said that they “notice” mobile advertising. In addition, over half click on the full range of advertising tools including mobile Web ads (56%) and mobile paid searches (51%). (Fig. 10)

However, these percentages change significantly when broken out by age groups. Only 33% of senior executives age 50 and over say they notice mobile ads, compared to 69% of those under 40. And only 23% of those age 50 and over click on mobile Web ads, just 5% frequently. Compare this to executives under age 40, where 39% click on Web ads frequently to gather business information, and 37% click on them occasionally.

## MOBILE APPS

Sponsored mobile apps—a strong promotional vehicle in the consumer market—may also be a way to reach executives in the business environment. In fact, senior executives appear to appreciate—or are at least willing to accept—sponsored, mobile applications.

Specifically, 53% of senior executives said that they often (25%) or occasionally (28%) download and run sponsored business-to-business mobile apps. (Fig. 11) This figure is again substantially higher (70%) for executives under 40. Note that 39% from this age group said they frequently accept such applications (versus 31% on occasion).

FIGURE 9: Do you notice advertising on your mobile device?

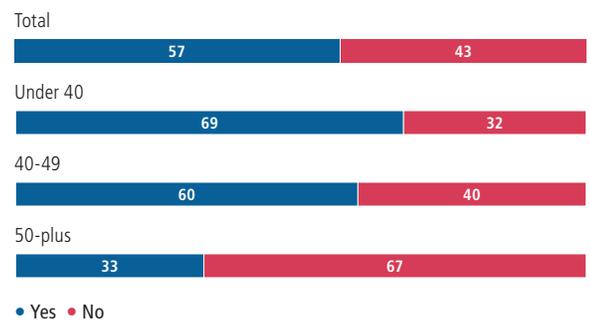
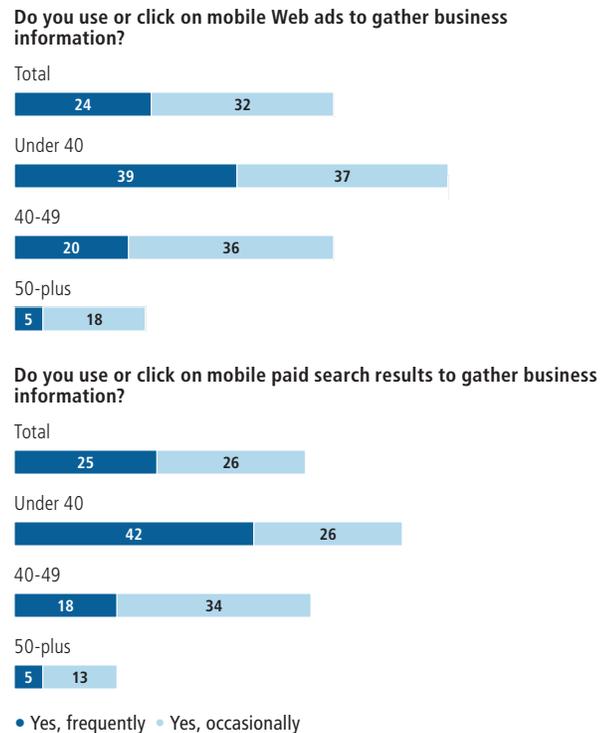


FIGURE 10: Mobile ad actions.



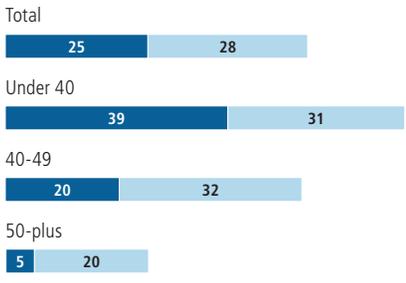
This generational split regarding mobile apps is further demonstrated in how executives view their vendors who provide them with sponsored mobile apps. Younger executives are clearly more comfortable with using apps to access business-related information from their mobile devices, whereas older executives haven't yet gotten to that point. Among executives under 40, nearly half (47%) felt that mobile apps from their vendors positively influenced their decision to work with them, whereas just 16% of those 50 or older felt that way. (Fig. 12)

As for purchasing "non-sponsored" mobile business applications, 52% of respondents said they do so often (28%) or occasionally (24%). Once again, younger executives were much more willing to engage with this format for gathering business information. Consider this: 41% of executives under 40 will use paid B2B mobile apps frequently, compare to just 5% of executives 50 or older who do so.

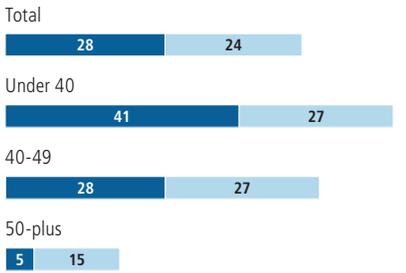
As optimistic as this may sound to marketers, senior executives also present a warning to would-be advertisers: 53% of executives—evenly distributed across age groups—indicate that they find mobile ads more intrusive than typical Web ads. As such, mobile marketers need to be careful to ensure they do not cross the line between welcome or at least acceptable advisory versus unwanted interruption.

FIGURE 11: Interaction with mobile apps.

**Do you use or click on sponsored B2B mobile apps to gather business information?**

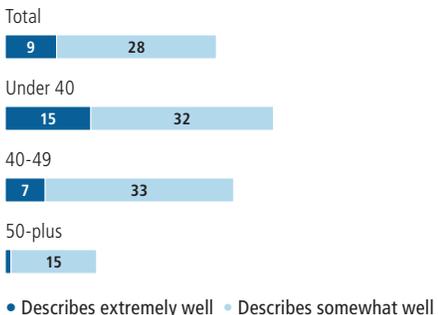


**Do you use B2B mobile apps you pay for to gather business information?**



• Yes, frequently • Yes, occasionally

FIGURE 12: Mobile apps from my vendors positively influence my decision to work with them



• Describes extremely well • Describes somewhat well

## A more mobile future

*“Living my life on the road and today having to carry a (phone, a tablet and a laptop), I’m looking forward to a future of as few devices as possible.”*

—Chris Justice, President, Ingenico North America

The power, capabilities, and mobility of the full range of business-focused devices continue to grow. At the same time, younger executives, who possess a near-innate familiarity of advanced technology, will likely continue adopting new technologies as they evolve. Where this leads is to a future of unprecedented connectivity, accessibility, and flexibility. Senior executives will be able to work from wherever they are, whenever they need, with whomever they want.

It also leads to a state of highly evolved devices. As previously highlighted, senior executives under age 40 are already showing signs of becoming device agnostic. Further supporting this trend, 80% of this group said they either strongly agree (42%) or agree (38%) that when at home, they prefer accessing work-related emails from their mobile devices as opposed to their home computer. (Fig. 13) This hints that younger executives are willing recipients of devices with broader capabilities, particularly when those capabilities can be coupled with mobility.

Closely related, two-thirds of executives under 40 said they strongly agree (32%) or agree (35%) that owing to the capabilities of their smartphones, they no longer carry a laptop when they are out of the office. If today’s smartphones can replace a laptop computer, imagine what tomorrow’s devices can accomplish with their likely larger screens, greater processing power, and improved interfaces.

Clearly, executives are looking for a device that combines the powerful mobility of a smartphone and the larger screen size and increased storage of a laptop. For many, this could be an Internet-enabled tablet device such as Apple’s iPad.

FIGURE 13: When I am at home, I prefer to access work-related email and information from my mobile device than from my home computer.

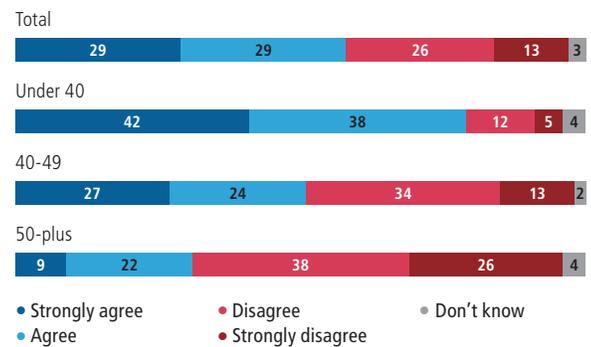
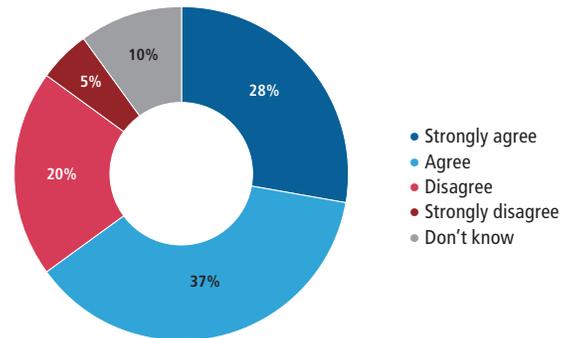


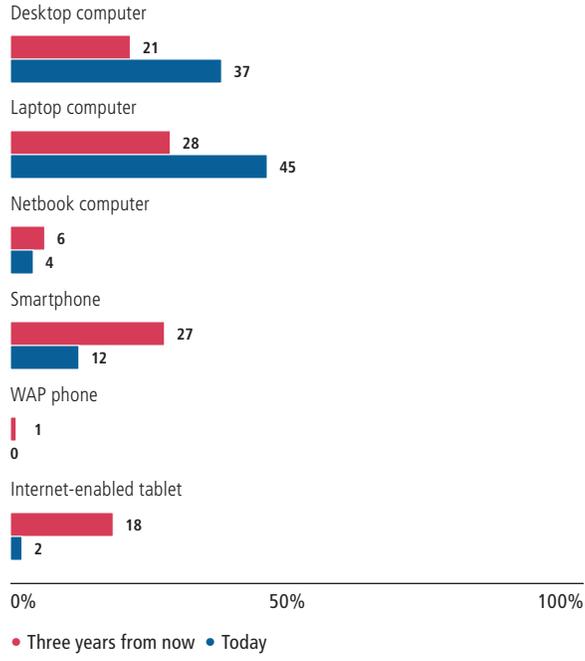
FIGURE 14: Within the next three years, I will be using a tablet device more frequently than a computer.



In fact, survey participants predicted that within the next three years, tablets will overtake both desktops and laptops. (Fig. 14) Specifically, 65% of senior executives either strongly agree (28%) or agree (37%) that they will be using a tablet device more often than a desktop or laptop. Those under age 40 believe this overwhelmingly.

Finally, within three years, 45% of executives believe a smartphone (26%) or a tablet (18%) will become their primary device for business-related use. (Fig. 15) While this is slightly below the 49% who believe their laptop (28%) or desktop (21%) will serve as their primary business device, the trend is evident.

**FIGURE 15:** Which device do you currently use most frequently for business purposes?



**IT'S ALL ABOUT THE TABLET**

Marcus Glover, assistant general manager at Harrah's Casino in St. Louis, absolutely loves his new tablet. Throughout the day, the executive shuttles from meeting to meeting all across the resort. A laptop in this case would prove too bulky. Meanwhile, he finds a smartphone lacking in applications, processing power, interface, and screen size.

But a tablet, said Glover, "is perfect for what I do—the tablet goes with me everywhere." In particular, the executive likes the electronic stylus. "It works great for me because I take a lot of notes—and it's just like a sheet of paper except I can save it and file it. It's a great tool for staying organized."

## CONCLUSION

# Convergence, then replacement

Businesses are benefiting from an increasingly mobile and digitized senior executive base. So equipped and oriented, these executives raise the bar in terms of organizational speed, efficiency, and effectiveness.

As for the devices they use, the future is one of greater convergence. Today, these executives are digital daters, doing what they can when they can with the device at hand. But younger executives in particular are seeking to push their mobile devices to the limit. As technologies evolve, the future will be one of increasingly powerful and more versatile, yet smaller and more mobile, devices. Whereas

today, executives often rely on three or four devices, in the near future, this could decline to only one or two.

As both mobility and device convergence advance, corporations and their executives will likely encounter an unprecedented blurring between working and personal existences. But if today's executives serve as a good example of what is to come, appropriate mores and practices will undoubtedly evolve. With few exceptions, the ability to work smarter as well as faster and from anywhere should deliver the room necessary to preserve a sustainable work-life balance.

### METHODOLOGY

The information in this report is based on the results of a survey and one-on-one interviews conducted by Forbes Insights in September and October 2010.

Forbes Insights, in association with Google, surveyed 306 executives at U.S. companies with annual sales exceeding \$500 million. More than half (57%) held C-level titles. The remaining executives held senior-level titles including SVP/VP/director (27%) and head of business unit/department (16%).

In addition, more detailed on- and off-the-record interviews were conducted with nine individual executives from companies fitting the survey profile.

**Forbes** | **INSIGHTS**

60 Fifth Avenue, New York, NY 10011 | 212-367-2662  
[www.forbes.com/forbesinsights](http://www.forbes.com/forbesinsights)