



2009 Enterprise Mobility Barometer

State of Mobility in Hospitality

July 28, 2009



Enterprise Mobility Barometer



Global primary research and market trends study conducted to better understand the decision-making environment and business strategies concerning ***enterprise mobility systems and mobility applications***.



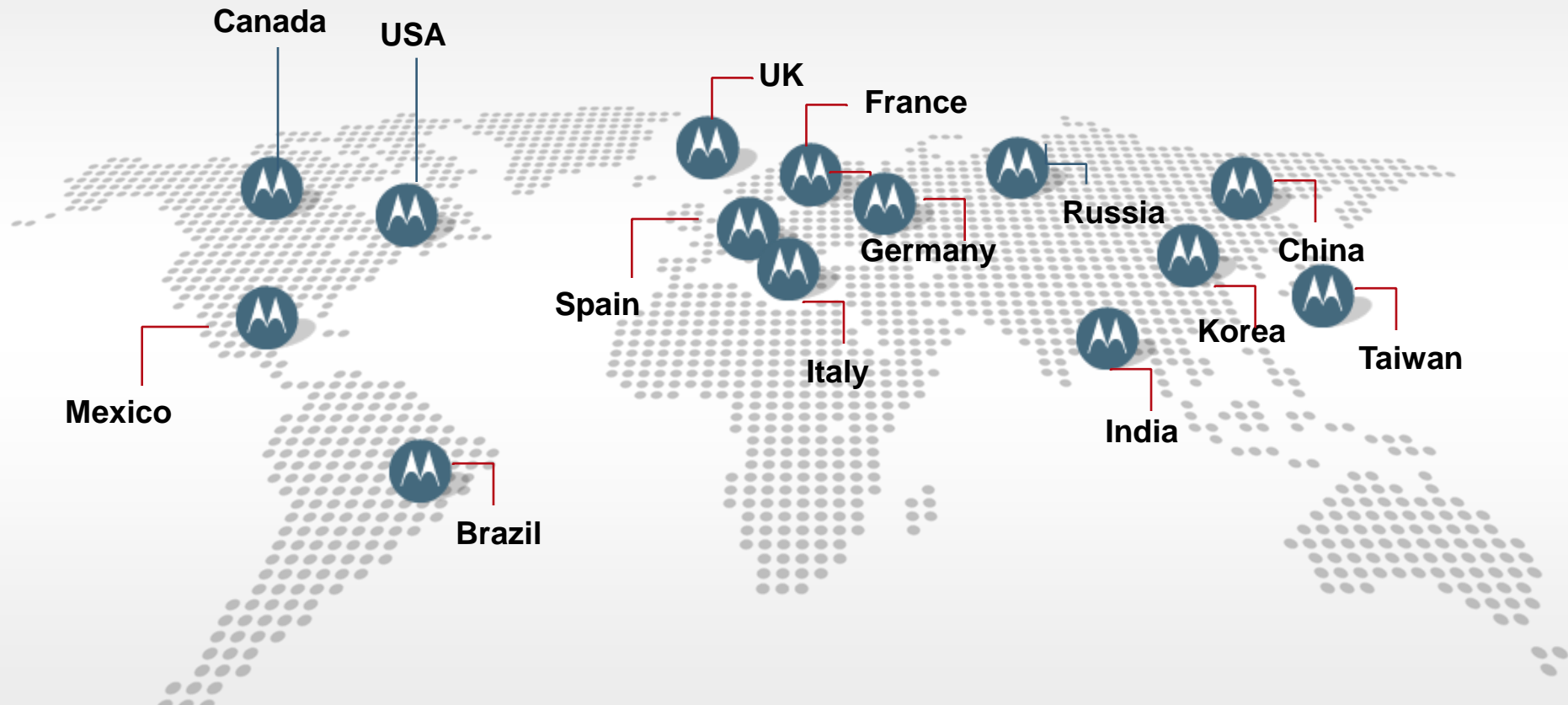
Key research areas of focus include:

- What are the major strategic mobility issues that concern mobility decision makers?
- How are mobile workers utilizing mobility solutions and what are the associated benefits?
- Which vertical industry segments and regions are adopting mobility solutions and why? What industries or segments have higher/lower mobility budgets?
- How are different segments of mobile workers using enterprise mobility solutions?
- Which applications are most deployed and which are poised for greater adoption?

Enterprise Mobility Barometer



- * Global primary market intelligence and primary research utilizing industry best-practices
- * Direct feedback from enterprise mobility decision makers, mobile workers and partners
- * Web and phone-based interviews with key enterprise mobility decision makers



In-depth enterprise global B2B market research spanning four continents and fourteen countries.

Key Takeaways



Importance of mobility in the hospitality industry is rising.

82% of decision makers within the hospitality industry report an increasing importance of mobility within their organization in 2009.

Push for competitive differentiation cited as key mobility investment driver.

Over six in ten surveyed decision makers within the hospitality industry agree that their company has competitive advantage using mobile and wireless technologies.

Key benefits include heightened customer satisfaction, increased per-person average and improved inventory accuracy/visibility.

Nearly one-half (>43%) reported an increase in customer satisfaction (netting a 34.9% average increase) and 27% cited an increase in per-person average.

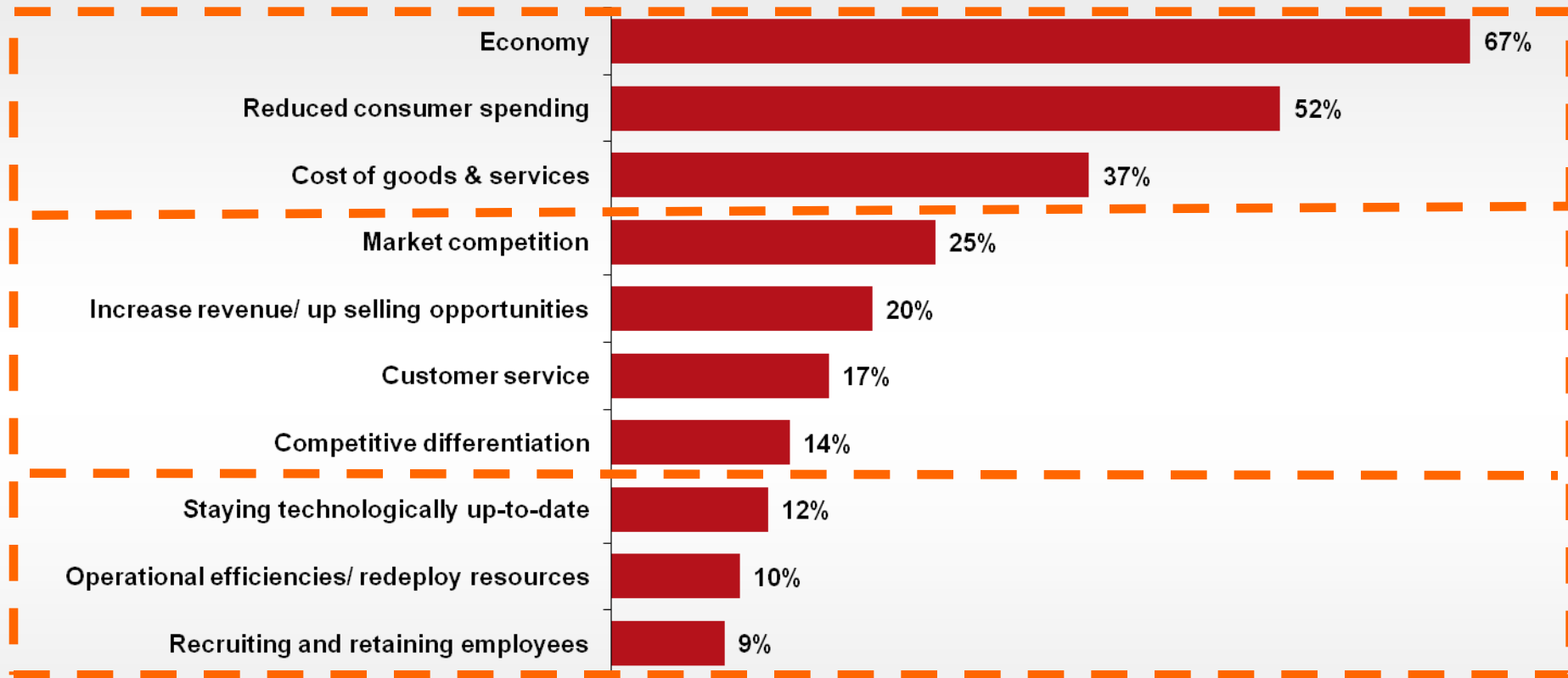
Mobility...viewed as future enabler of growth.

When compared to a representative set of emerging technologies, over one-half (53%) of respondents voiced that wireless ordering & reservations would provide the greatest impact to their organization within the next five years.

Quantitative View – Issues Facing Hospitality



Q: “What are the issues most affecting your business in 2009...?”



Hospitality industry IT/Telecom decision makers segment industry issues into three key categories: economic, market-centric and operational.

Prioritization of Key IT Initiatives in Hospitality



Q: “Of the IT and telecom initiatives listed below, please rank the three most important initiatives for your company in 2009?”

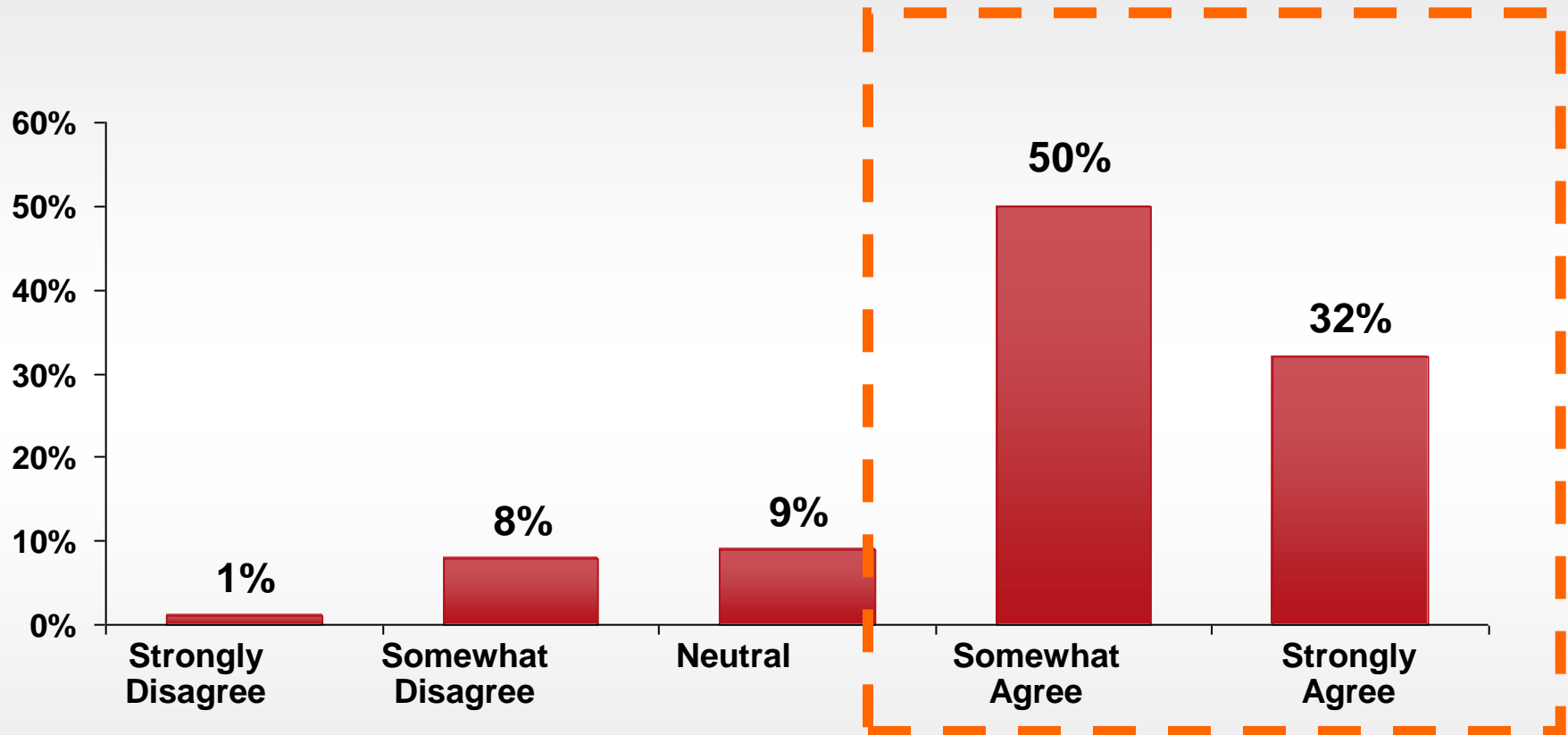
1	Disaster Recovery/Business Continuity	2.3
2	Mobility Support To Employees	2.2
3	Server Upgrades	2.2
4	LAN/WAN Upgrades	2.1
5	Security Hardware and Software	2.1
6	Software Upgrades	2.1
7	Network Security	2.0
8	Business Intelligence	1.9
9	Database Management	1.9
10	IP Telephony/Voice over IP (VoIP)	1.9
11	PC (Desktop or Laptop) Upgrades	1.7

Of the top IT and telecom initiatives for 2009, mobility support to employees was ranked #2 by decision makers within the hospitality industry.

Importance of Mobility in Hospitality Rises



Q: “Mobile and wireless technologies are more important to my organization today than they were last year.”

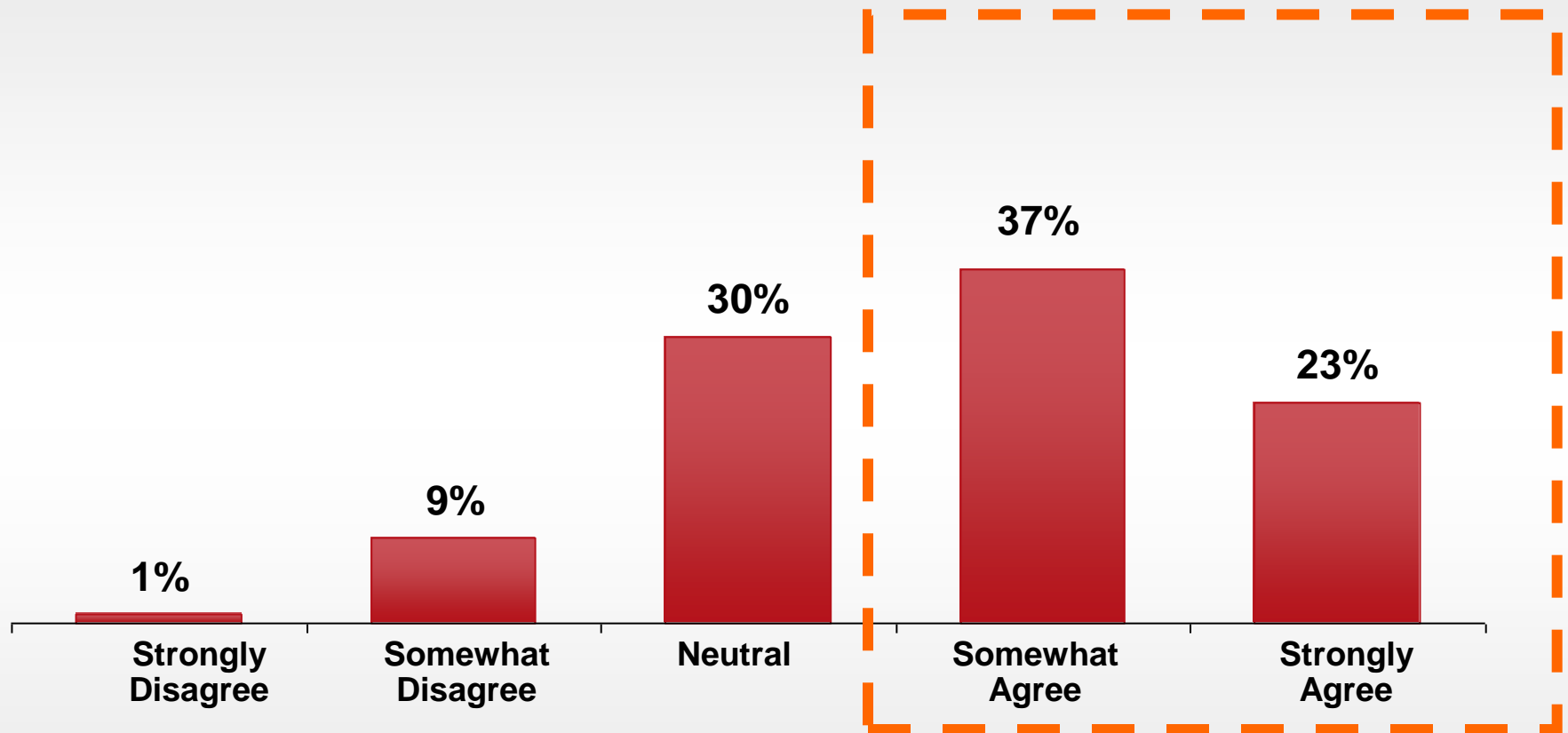


82% of decision makers report an increasing importance of mobility – a sizeable percentage increase from previous research conducted in 2008.

Mobility...Viewed as A Competitive Advantage



Q: “My company has a competitive advantage by using mobile and wireless technologies.”



Over six in ten surveyed decision makers within hospitality agree that their company has competitive advantage by using mobile and wireless technologies

Mobility Benefits and Challenges in Hospitality



Q: “What are your organization’s key benefits and challenges with regard to the usage of mobile and wireless technologies?”



Key Mobility Benefits

1. Increased employee productivity/efficiency
2. Increased customer/partner satisfaction
3. Increased business revenues/sales results
4. Reduced labor costs via automated processes
5. Increased order fulfillment accuracy



Key Mobility Challenges

1. Cost of hardware
2. Security concerns/risk
3. Cost of software, integration, service, and support
4. Difficulties in employee training and support
5. Difficulties integrating mobile apps, existing infrastructure

Increased employee productivity/efficiency, increased customer/partner satisfaction and increased sales were cited as key benefits.

Mobility Benefits and Challenges in Hospitality



“ **Table side processing of their credit cards has resulted in more satisfied customers.** ”

“ **Effectiveness increases for everyone - servers aren't wasting time running back and forth and waiting on terminals when guests can pay at table right away (helps a lot when we're slammed).** ”

“ **...faster service with better employee satisfaction. Also, quicker communication amongst top management.** ”

Mobility Benefits and Challenges in Hospitality



“ ...management of devices and security for the devices. Cost of replacing these things. ”

“ Employee training...people finding it hard to adapt to the new technologies. ”

“ ...workforce acceptance, re-engineering of back office. Some of the applications are not fully integrated and we're having challenges with some mobile devices integrating with security solutions. ”

Mobility Benefits and Challenges in Hospitality



Q: “Which of the following benefits has your company realized...?”

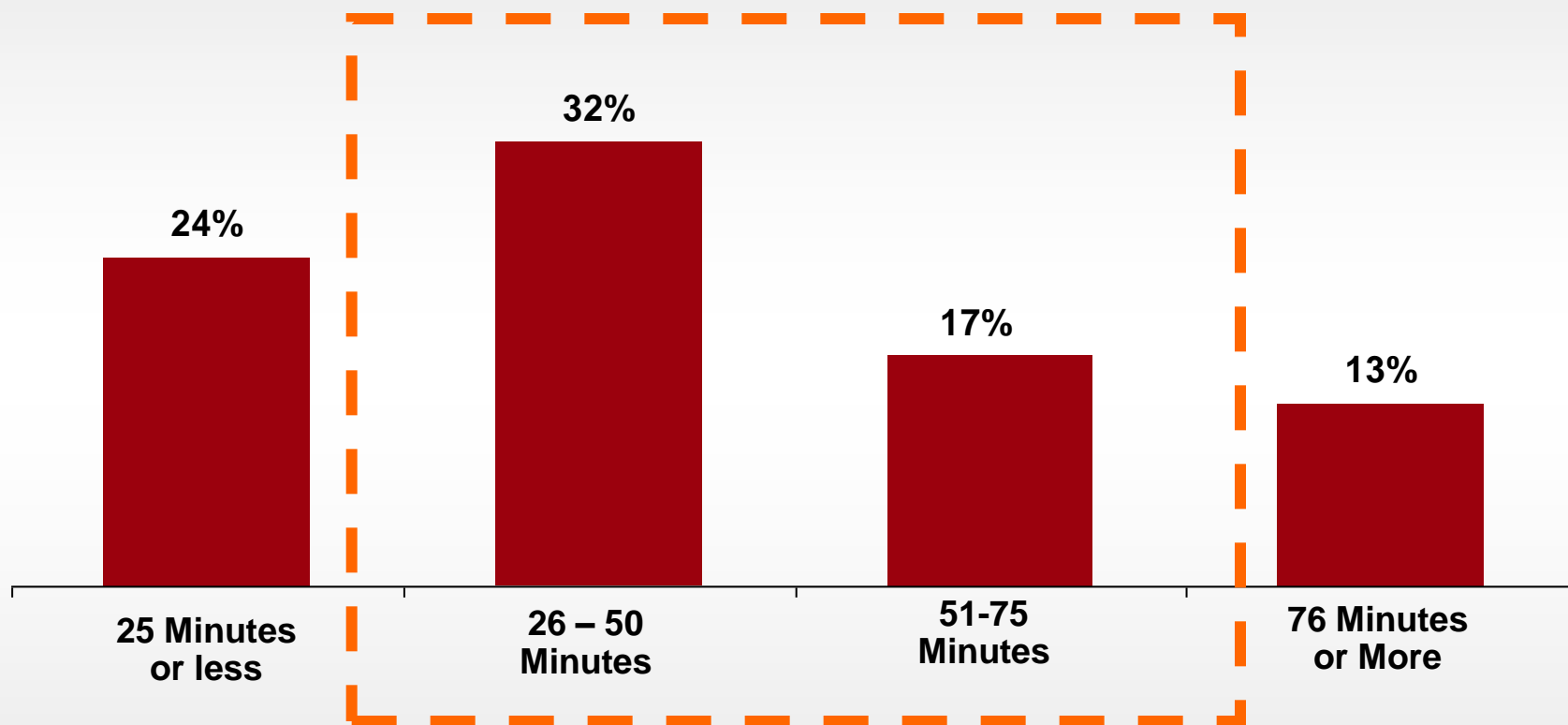
	% Realizing Benefit	Average Increase
Increased customer satisfaction	43.3%	34.9%
Per-person average	27.2%	-
Increase in inventory visibility	14.3%	22.2%
Improvement in employee retention and productivity	7.4%	22.1%
Expansion in server station size	6.0%	26.5%
Reduction in front-of-house labor	4.1%	15.3%
Increased business revenues/sales results	3.2%	20.3%

Key benefits include heightened customer satisfaction, increased per-person average and improved inventory accuracy/visibility.

Mobility in Hospitality, Cited Productivity Gains



Q: “How much downtime (minutes per day) does the typical employee save or recover using a mobile application in a hospitality environment?”

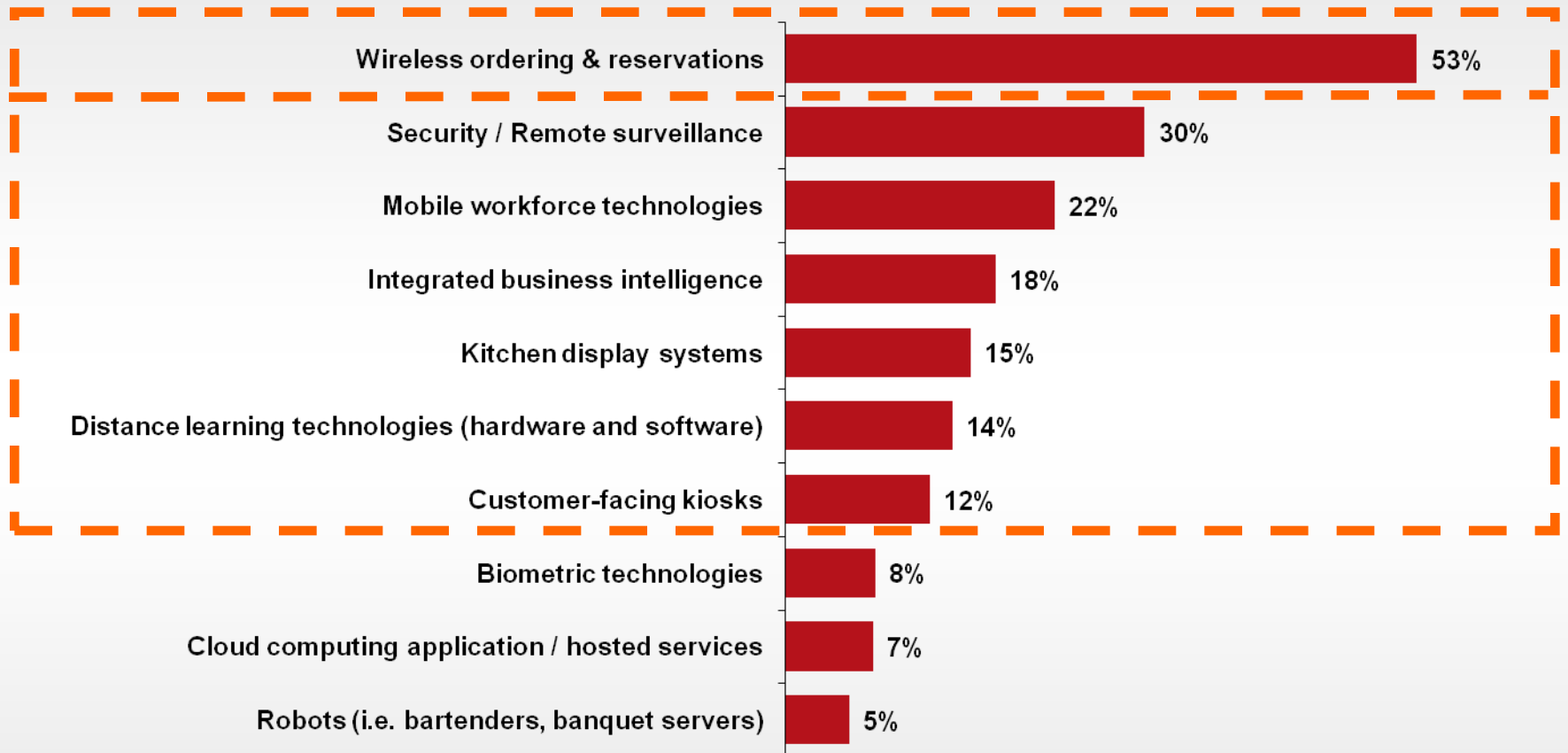


The utilization of key cited mobility applications within the hospitality industry saves mobile employees an average of 44.1 minutes per day.

Technologies Impacting Hospitality Industry



Q: “Which new technologies are emerging and which do you believe will provide the greatest impact to your organization within the next five years?”



Over one-half (53%) of respondents voiced that wireless ordering & reservations would provide the greatest impact to their organization within the next five years.

Thank You



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