

**TOUGHBOOK**



# Is your utility field service team falling behind?

Utility execs report on the critical role of utility mobile solutions.

**Panasonic**  
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# Introduction.

**As utility teams perform critical field work every day — inspecting infrastructure, responding to outages, and maintaining equipment — their tablets and laptops can either be productivity powerhouses or hidden liabilities.**

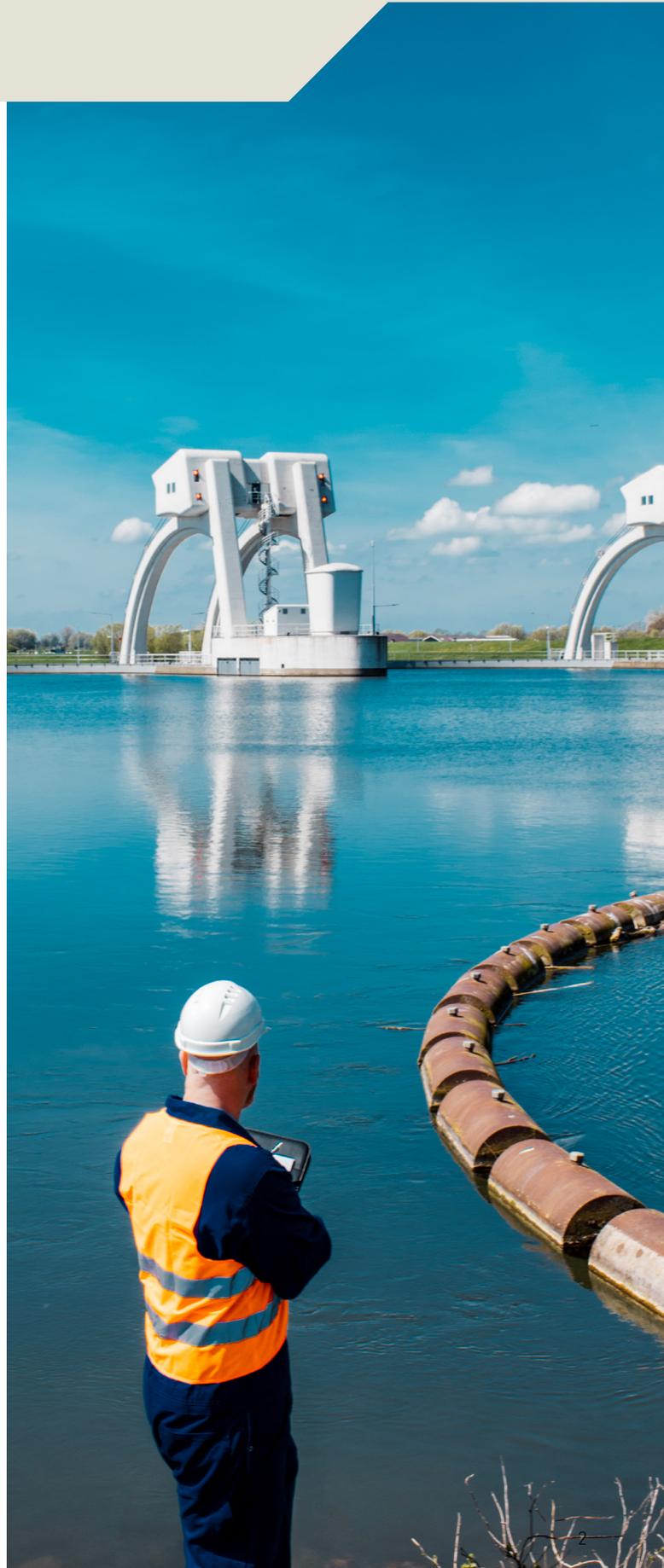
The outcome depends on the technology choices you make for your team.

Using the wrong laptop or tablet drains productivity behind the scenes, without anyone noticing how much (and how quickly) these inefficiencies add up. For example, if one of your technicians loses one hour each week due to device downtime, they **lose more than 40 hours in one year – the equivalent of an entire work week.**

Using the correct device can mean the difference between a job done quickly and correctly the first time and frustrating, costly delays.

To explore the operational realities faced by utility companies, Panasonic Connect and Utility Dive's studioID gathered insights from 155 utility leaders about how their field teams use laptops and tablets in their daily work. While these findings reveal key areas where devices enable efficiency, they also **suggest significant opportunities for improvement.**

**The insights in this report can help you spot hidden productivity drains, make informed choices about field laptops and tablets, and empower your teams to perform their work more effectively. Based on what you learn, how will you increase the productivity of your field operations?**



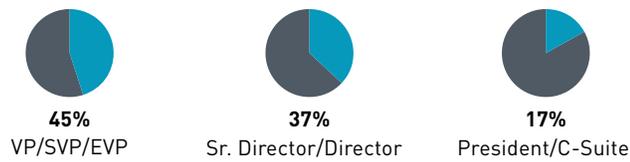
# Executive summary.

## Survey respondent profile

### Utility type



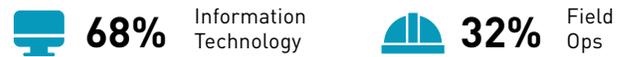
### Seniority



### Annual revenue

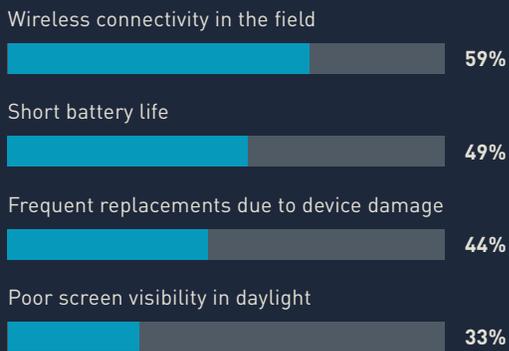


### Role

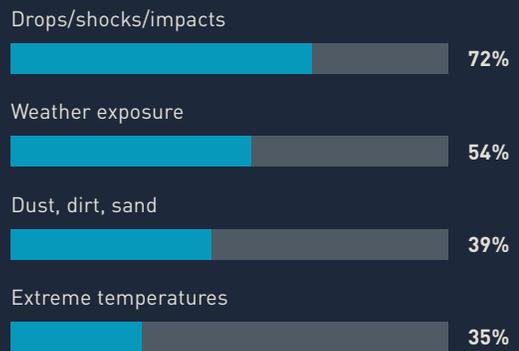


## Field conditions demand rugged tech

### Most significant challenges with field laptops and tablets



### Most common causes of laptop and tablet failure



### Field work in 2025:

#### What tops the priority list?



### Powering the future:

#### Most impactful emerging tech?



Setting the stage:

# What do utility executives care about most?

As leaders at the helm of a critical industry, utility company executives face mounting pressure to perform by modernising their operations and consistently delivering reliable service. Their ability to do this often correlates directly with their ability to **keep field workers productive**.

Surveyed executives currently face challenges with:

- Managing **aging infrastructure** (69%) to prevent outages and emergency repairs.
- Optimising **equipment and asset maintenance** (41%) to stay on top of breakdowns and ensure resiliency.
- Mitigating **cybersecurity threats** (37%) that can wreak havoc on infrastructure and utility services.
- Addressing **worker attraction/retention** (32%) amid a maturing workforce and a lack of skilled and available talent.
- Nurturing **worker productivity** (26%) to meet growing demand with limited resources.

These challenges demand action. And the majority of utility executives seem to have their sights set on the right strategies and priorities.

For instance, **69% are prioritising modernised infrastructure** for field work in 2025. This represents a clear commitment to reliability and resiliency. **Improving worker productivity (55%)** and enhancing real-time connectivity in the field (46%) are also high on leaders' agendas, indicating that they recognise the valuable connection between empowering teams and operational excellence.

Meanwhile, reducing costs was less of a priority, with only 15% citing it as a top priority. Utility executives don't seem to be focused on cutting corners. Instead, they want to invest in future-ready improvements and solutions.

The success of their efforts will, in part, be measured by the productivity of their field workers.

## Top priorities for utility executives.

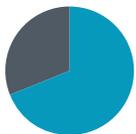


Digging into the data:

## How are utilities using tablets and laptops?

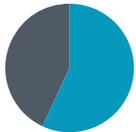
When equipped with the right laptops and/or tablets, field personnel can quickly, accurately and efficiently complete tasks.

Over half say their field teams use devices primarily for:



**69%**

Work order management, maintenance and repair.



**57%**

Data collection: customer service surveys, inspections and meter reading.

These findings indicate widespread adoption and signal just how central technology is to daily field operations. Reliable laptops and tablets play a critical role in **empowering workers to perform high-quality work faster, safer and with more confidence.**

### How well do current laptops and tablets serve workers?

Just because workers have devices at their fingertips doesn't mean they're automatically able to work efficiently and effectively. Anything that stops them from getting their jobs done is a bottleneck that should be addressed as soon as possible. While many obstacles can be encountered in the field, **productivity issues often point back to the technology in use.**

Utility executives report that their field workers face major challenges with the current mix of field laptops and tablets in use.

### Top pain points include:

- **Wireless connectivity issues** (59%), which can disrupt communication, delay data access and waste time.
- **Short battery life** (49%), which can cut work short and prevent critical work from being completed.
- **Frequent device replacement due to damage** (44%), which leads to unplanned downtime and high operating costs.
- **Poor screen visibility in outdoor settings** (33%), which makes it hard for workers to read, communicate and enter information into or retrieve data from their devices.

Imagine what it must be like to be working in the field as you struggle to connect, watch your battery die halfway through a service call, drop your device and wait for a replacement, or seek shade so you can view your screen.

These pain points are common but critical to resolve if you want to empower your team to work faster and more efficiently, no matter where their work takes them. When you can **step in to remove these obstacles**, you make a direct and positive impact on workers' ability to complete tasks accurately and efficiently.

When the right types of devices are used, these challenges can be overcome. Otherwise, certain conditions can accelerate device failure and drive more frequent replacement.

Respondents say laptop and tablet failure is most often caused by:

- **Drops, shocks and impacts** (72%) that result in cracked screens, damaged components, and device failure.
- **Weather-related damage from rain, snow and humidity** (54%) that can lead to unreliable performance.
- **Exposure to dust, dirt and sand** (39%) that impacts screen visibility, clogs ports and can lead to internal overheating.
- **Damage from temperature extremes** (35%) that can disrupt field performance and shorten the overall lifespan of the device.

Challenging conditions are common on job sites for utility team members as they work in extreme weather, harsh environments and unpredictable scenarios. Because they can't change their circumstances, they must have tools that empower them to work safely, efficiently and reliably.

Nearly half of surveyed utilities executives say their field workers use rugged devices exclusively. **But more than half say their field workers use a combination of rugged, commercial and consumer devices.**

The consequences of using non-rugged, consumer-grade and/or commercial devices can lead to detrimental failures, and many utility executives say they're **experiencing the consequences firsthand** through:

- **Missed or late service calls** that lead to lost revenue and reputation damage.
- **Backlogs** that delay critical maintenance and lead to breakdowns.
- **Longer hours** that can tire workers and increase the possibility of safety risks.
- **Dissatisfied customers** that no longer trust their utility service.



## The impact of downtime on utility operations

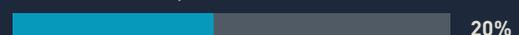
Late/missed service calls, resulting in backlogs



Infrastructure maintenance delays



Poor incident response times



# Utility teams need laptops and tablets that perform.

From extreme heat and wind to snow and bitter cold, utility workers spend their time working in a range of harsh and unchangeable conditions. The hardware that supports their work must keep up. But, as we learned earlier, more than half still rely on devices that aren't cut out for the job.

So, what's the solution? **Investing in rugged, purpose-built laptops and tablets designed for demanding field environments.**

How well are executives aligning their device purchases with field and team realities? When asked about the top features they look for in laptops and tablets, **survey respondents identified these features as "extremely important":**

- Physical durability (92%)
- Connectivity (81%)
- Long battery life (80%)
- Environmental durability (79%)
- Security (68%)
- Display quality (49%)

The factors that matter most to you will depend on your workers and the field environments they encounter. It's important to make sure the devices you select not only address today's real-world field priorities and challenges, but will also support what you'll need in the future.



This checklist can help you decide which type of field laptop or tablet will keep your field workers productive and connected.

### Key considerations:

- ✓ **Where and how will the device be used?**  
Consider weather conditions and temperature extremes, exposure to dirt and dust, durability to handle drops and mishandling, etc.
- ✓ **What are our connectivity needs?**  
Wi-Fi, 4G-LTE/5G, etc.
- ✓ **What type of device testing does the manufacturer perform?**
  - Scope and rigour
  - IP rating
- ✓ **What type of support services does the manufacturer provide?**  
Check if the manufacturer offers IT services to speed up rollouts and warranty support to minimise downtime.
- ✓ **What is the total cost of ownership?**  
Purchase price, maintenance/repair, warranty/support contracts, licences, replacement cycle, etc.

### Features to look for:

- ✓ **Modularity**  
Customisable ports to support legacy systems and evolving technologies.
- ✓ **Security and access**  
Encryption, biometrics, firmware.
- ✓ **Ingress Protection (IP)**  
IP ratings uniformly grade the resistance of electronic devices against the intrusion of dust and liquids.
- ✓ **Display quality and options**  
Readability in sunlight, glove-friendly touchscreen.
- ✓ **Battery life/hot-swappable batteries**  
Maintains connection during battery changeouts to avoid downtime.



The future is rugged:

## Are you prepared for the next wave of innovation?

Utilities are facing a pivotal moment: **choosing the status quo or embracing innovation.**

Modernising electrical and water systems is essential to ensure reliability, sustainability, and resilience. The success of these initiatives depends on productive and adaptable utility field teams — they're at the helm of these modernisation efforts.

Having the right laptops and tablets for the job not only ensures that today's work gets done efficiently, but also positions your team to adapt and respond to tomorrow's challenges. Taking a strategic approach to utility technology can help you lay the groundwork for a future where efficiency, innovation and resilience reign.

When asked which emerging technologies will be most critical in the future, nearly 80% of executives report that **AI will be the difference-maker**, as it's used to:

- Analyse data streams from smart meters, sensors and other field devices to identify patterns and predict failures.
- Enable field and office teams to make smarter, faster and more informed decisions.
- Perform inspections to identify issues.
- Analyse photos and videos for early signs of wear.
- Turn notes and observations into reports and documentation.

Two-thirds of respondents (66%) predict that **predictive analytics** will play a major role, enabling:

- Proactive maintenance to address issues before breakdowns occur.
- Predictions about what failures will occur — and when.
- Early warnings about potential safety risks.

To support these innovations, teams will need reliable, high-performance rugged laptops and tablets that can maintain seamless connectivity and handle demanding field conditions without downtime. The right device strategy empowers teams, improves customer satisfaction, and lays the groundwork for future innovation.



# TOUGHBOOK

## About the research:

In May 2025, Panasonic Connect partnered with Utility Dive's studioID to survey 155 executives at water and electric utilities. The survey examined current laptops and tablets in use by field workers, how these devices are used, and the challenges associated with them. It also revealed utilities' future priorities related to technology and connectivity for field operations.

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