B2M

2nd annual STATE OF ENTERPRISE MOBILTY SURVEY and REPORT

1 Oct 2019

WELCOME

Welcome to our second-annual survey of enterprise end users who depend on mobile devices and applications to do their job daily. This year's survey once again focused on these mobile workers, and their views for how often their mobile device fails to deliver the uptime and reliability they require in order to do their job.

We also expanded the survey this year to include IT Workers in charge of enterprise mobility, to gain their critical perspective on how they manage mobility today, the outages they experience with end-users, and some insights on what they would like to see going forward to make their life and their end-users' lives better.

There is no question as we go into the second half of 2019 that mobile devices and applications are critical for today's enterprise. The use and dependence on mobility has grown dramatically in the last 15 years to the point that most enterprises depend on mobile devices across their organization in order to keep the company running daily and hourly.

We are no longer in a "mobile-first" era of mobility where the enterprise encourages use of mobile and mobile applications. We are now in a "mobile-only" environment, where mobile devices and applications in the hands of end-users are the key, and usually only end-points for managing the entire supply-chain and revenue cycle for the enterprise.

Yet despite this dependence on "business-critical" mobile devices and applications, as our survey shows, the failure rates of these devices and applications are extraordinarily high, and IT staffs lack the tools needed to proactively see problems and fix them, and even predict problems before they occur.

Our survey highlights the gap between what line workers dependent on mobility may be experiencing for mobile failures monthly, and what IT sees as failure rates using the tools they have in place to monitor mobility. Our survey shows a critical failure rate in mobility which is negatively impacting enterprises, and IT is usually not aware of the scope of the problem. The costs and impact of this failure is high.

It's time for enterprise mobility to shift its management tactics and strategies to go beyond MDM and other traditional mobile management platforms. As the survey shows, enterprises are losing customers, revenue and employees because of mobile downtime. And the hidden and visible costs to the enterprise of these outages is quite high.

We hope this survey will stimulate conversations within the enterprise on what outages are occurring across the mobile ecosystem, and how to better manage business-critical mobile devices and applications in 2020 and beyond.

Sincerely,

Gary Lee
Chief Revenue Officer
B2M Solutions
www.b2m-solutions.com

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EXECUTIVE SUMMARY

Despite mobility now being a critical IT asset in the enterprise where workers depend hourly on their mobile devices and applications to do their jobs, enterprise mobility continues to suffer costly downtime and outages which are negatively impacting the business.

In this year's survey, **over 50% of end-users report they are experiencing mobile failures monthly which impact their ability to do their job – far above what IT sees monthly via its trouble-ticket-driven model.** This is higher than industry-accepted norms, and indicates line workers are experiencing far more impactful issues than previously thought.

The **top three mobile issues plaguing end users** in this year's survey are application stability, mobile device batteries not lasting long enough, and unstable network connections which make application usage suffer as most applications depend on network connections for data transfers.

And the occurrence of these issues is rising, with **over a third of end-users in this year's survey reporting the number of mobile issues affecting their ability to do their job has risen over the last 12-18 months.**

Costs and Impact of Outages

Lost Customers and Revenue: The costs and impacts of these issues is high, with over 50% of end-user survey respondents acknowledging mobile issues have caused a **loss of customers and revenues over the last yea**r.

Increased Device Costs: Further, the hidden costs of **replacing healthy devices and batteries** just because end-users complain about issues and support teams do not have tools to quickly ascertain true device health and root causes of issues, can be a substantial CAPEX and OPEX cost burden.

Lost End User Productivity: End-users are acknowledging these issues are negatively impacting them, with **95% of all end users affected by mobile issues stating it has impacted their productivity as they cannot do their job** if their mobile device does not work.

And when IT workers are asked about the same productivity loss for end users, this year's survey shows a dramatic gap in their visibility and understanding of this issue, with only 33% of those in charge of mobility acknowledging the loss of end user productivity.

This year's survey highlights the average amount of time end users spend troubleshooting and having their devices repaired, with **63% of users stating between 30 and 180 minutes are spent on each mobile issue – time which is often spent in lieu of completing the tasks and job assigned to the end user.**

Increased End User Stress: Further, end users in this year's survey have shown a dramatic increase over last year's survey in reporting the **level of stress they feel over mobile issues** which affect their ability to do their job. Last year, 39% of end-users acknowledged feeling stress and anxiety if their mobile device failed to allow them to do their job. This year, 66% of users acknowledged the same.

End Users Taking Time Off / Sick Time From Work due to Mobile Issues: This year's survey again highlights **end users taking time off work** which they attribute to the stress of mobile issues not allowing them to do their job effectively. Where last year only 16% admitted to taking at least one day off, this year the number has climbed to 37%. Further, of those taking time off, 28% took 1-2 days in last year's survey, compared to 43% in this year's survey.

Continued…

EXECUTIVE SUMMARY (continued)

End Users are Speaking Out: This year's survey again highlights **end users reporting the stress and anxiety they feel** which they attribute to the stress of mobile issues not allowing them to do their job. We see a positive trend with over 74% of stressed end users speaking out this year, compared to 31% last year. But there is still a lack of faith anything will be done to resolve the issues, with 30% of these end users believing nothing will be done – a slight increase over last year.

Mobile outages are increasing, stress level for end users is rising as their dependence on mobile is met with outages causing them to not be able to work, and the resulting outcomes are lost customers, lost revenues and increased costs.

IT Workers

86% of IT Workers in the survey feel they have enough tools to support mobility, but when asked about the value of these tools, **most of the legacy tools at their disposal such as MDM / EMM, Configuration tools and TEMs were not ranked as highly valuable.**

When asked about new tools which could give them real-time visibility into the health and utilization of mobile devices, apps and users, however, **over 91% of all IT workers rated real-time visibility tools as Extremely valuable or Valuable to their jobs**, perhaps signifying IT workers recognize the need to provide the same level of real-time alerts and monitoring to mobility that 84% of survey respondents admit they have for other critical IT assets like routers, switches, etc.

96% of all companies surveyed have an MDM / EMM in place, yet when asked if these tools are giving them the visibility and real-time analytics needed to properly support mobile devices and users, **only 2% of respondents said the tools were meeting their needs**.

Summary

Mobility is critical for virtually every company today, but this survey highlights the underlying operational issues in supporting mobility through the workday or even 7x24.

Workers depend on their mobile device and applications. And when these devices and applications fail, the cost to the company is extremely high with outages occurring far more often than previous research studies or prevailing wisdom have shown,

While not explicitly asked or stated in the survey results, there is certainly the potential for forward-thinking organizations to recognize it's time to manage critical mobile assets like all other business-critical IT assets by investing in software tools which can provide both the real-time visibility and alerts to problems to avoid outages, issues and downtime affecting end-users.

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Despite being a business-critical asset, mobile devices & apps are failing often and impacting end users.

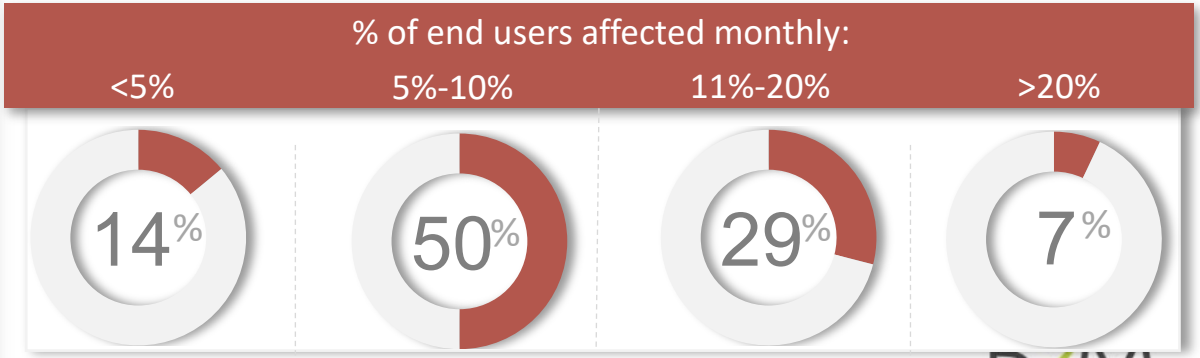
MOBILITY ISSUES ARE AFFECTING END USERS

51% *of all end users surveyed reported having at least one mobile issue per month which impacts their ability to do their job*

while almost 80% IT workers surveyed said only 5% to 20% of their end users report problems monthly.

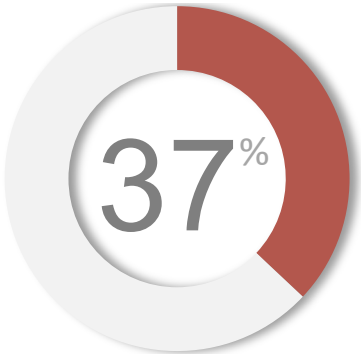
5%...20%

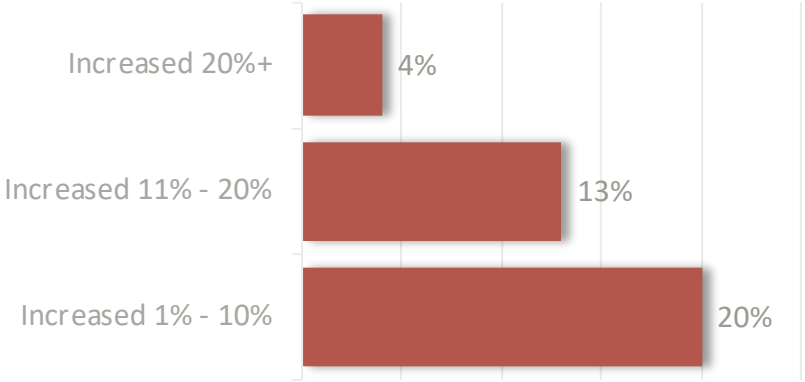
The gap may be explained by end users not reporting all issues they experience, and IT not having the monitoring tools needed to monitor all end-user impacting issues.



MOBILITY ISSUES ARE AFFECTING END USERS

37% of end-users reporting problems say the number of issues they've experienced per-month over the last 12-18 months has increased.





Monthly increase in mobile issues by end-users reporting problems.

It's getting worse. Over a third of end-users report an increase in the number of mobile issues they experience each month.

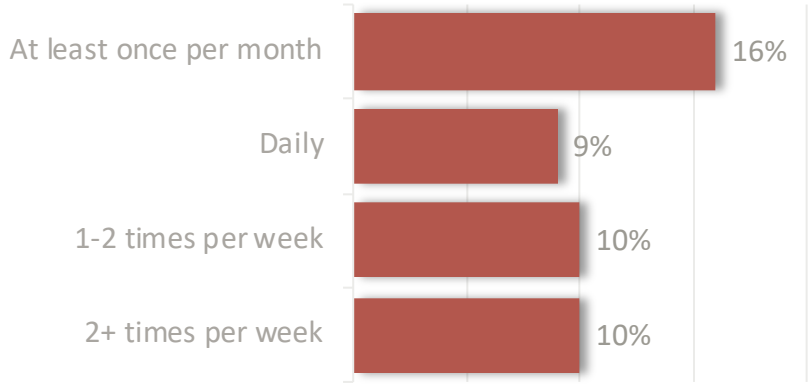
#1 Issue:

Unreliable Network Connections (Cellular and WiFi)

TOP 3 MOBILITY ISSUES AFFECTING END USERS:

45% *of all end users surveyed said they have network-related issues one or more times per month (daily, weekly or at least once per month)*

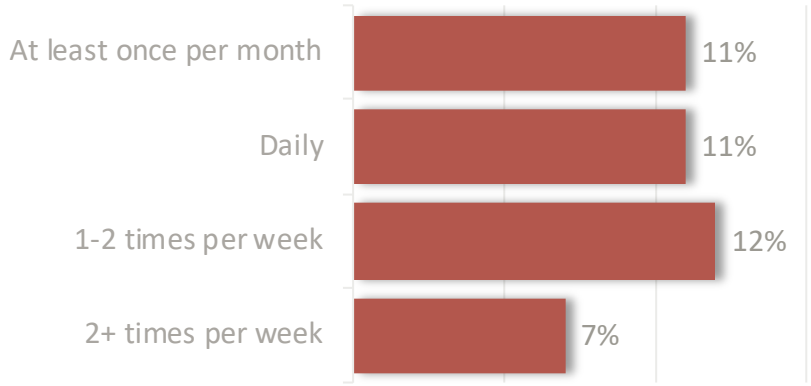
The average occurrence of network-related mobile issues for each end user in oursurvey



TOP 3 MOBILITY ISSUES AFFECTING END USERS:

41% *of all end users surveyed said they have battery-related issues one or more times per month (daily, weekly or at least once per month)*

The average occurrence of battery-related mobile issues for each end user in our survey



#2 Issue:

Device Batteries not lasting an entire work shift

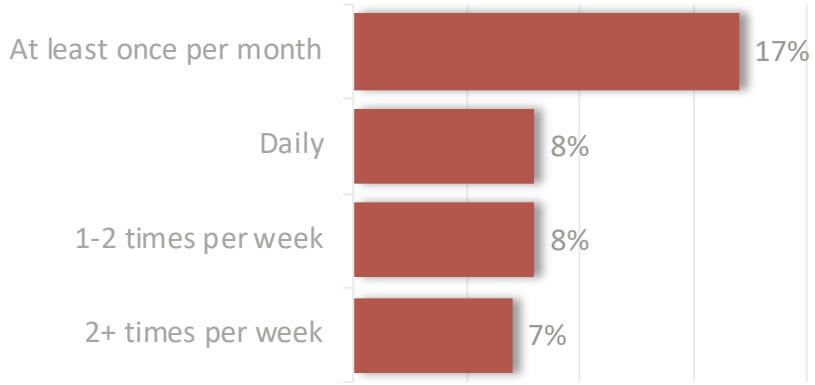
#3 Issue:

Mobile Applications Crashing / Becoming Unstable

TOP 3 MOBILITY ISSUES AFFECTING END USERS:

40% *of all end users surveyed said they have app-related issues one or more times per month (daily, weekly or at least once per month)*

The average occurrence of app-related mobile issues for each end user in our survey



IMPACT OF MOBILE ISSUES

50+% lost revenue

More than 50% of all End Users surveyed said their company has lost revenue due to mobile-problems

50+% lost customers

More than 50% of all End Users surveyed said their company has lost customers due to mobile-problems

Mobile issues are causing enterprises to lose customers and revenue

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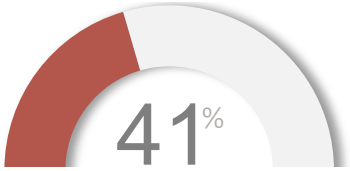
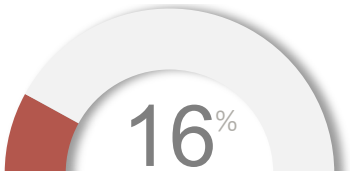
Unnecessary replacement of healthy batteries in devices is raising operating costs for mobility

IMPACT OF MOBILE ISSUES

When end users report a mobile battery issue, IT responds by:



of IT workers admit to automatically replacing the battery to solve the problem.



of IT workers admit to automatically RMAing the entire device to swap the battery and solve the problem.

A lack of tools to remotely monitor and diagnose battery issues may be to blame. The result?

88% *of all IT Workers surveyed admit they likely unnecessarily replace device batteries which are perfectly healthy*

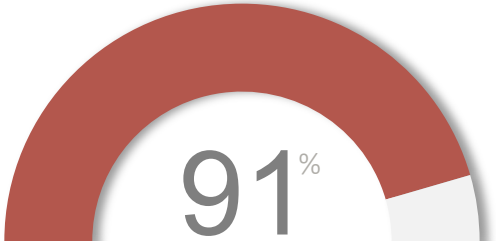
28% *Admit between 1 and 25% of batteries replaced are healthy*

29% *Admit between 26 and 50% of batteries replaced are healthy*

19% *Admit between 51 and 75% of batteries replaced are healthy*

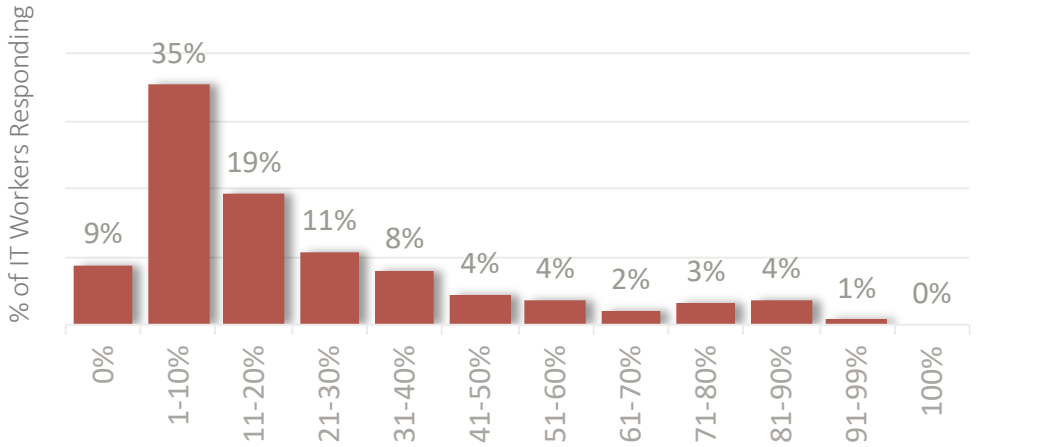
12% *Admit >75% of of batteries replaced are healthy*

IMPACT OF MOBILE ISSUES



of IT workers admit returning healthy devices for repair (devices which are ultimately classed as "No Fault Found / No Trouble Found (NFF/NTF)")

As shown below, 54% of all IT workers admit between 1 and 20% of all devices returned are healthy. NTF / NFF is costly as it means replacement devices are purchased and in use for no reason in addition to the costs of managing each replacement.



Unnecessary replacement of healthy devices is raising operating costs for mobility

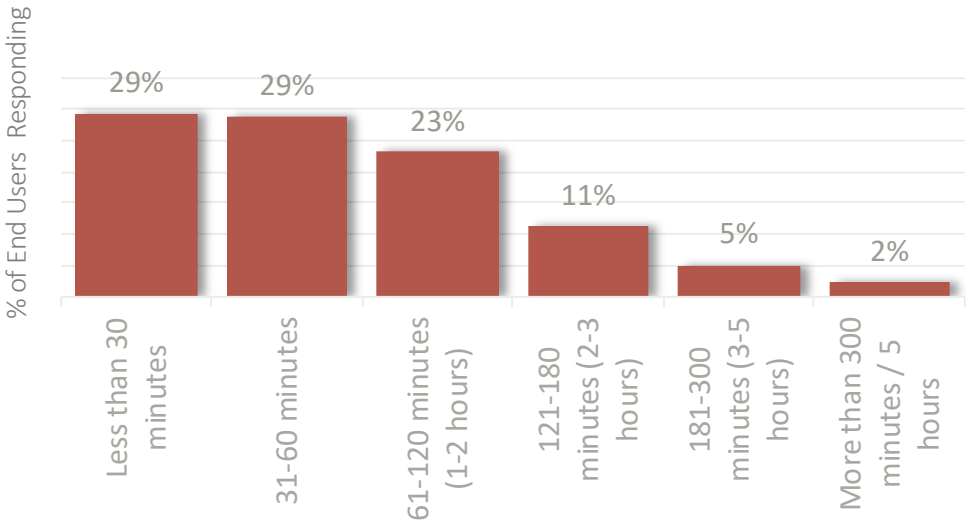
Lost End User Productivity due to Mobile Issues is Raising Operating Costs for mobility

IMPACT OF MOBILE ISSUES

63%

As shown below, 63% of all end users surveyed state it takes between 30 and 180 minutes on average for any mobile issue to be resolved.

During this time, it's common for the end user to be unproductive – even completely unproductive by not being able to work resulting in increased costs for the company.



On average, how long it takes for any mobile issue to be resolved by yourself of the people who support you

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IMPACT OF MOBILE ISSUES

95% *of all end users surveyed, who experience issues with their mobile device, say the company is negatively impacted by lost end user productivity due to mobile issues.*

versus

33% *of all IT Workers surveyed say the company is negatively impacted by lost end user productivity due to mobile issues.*

This survey highlights a potential gap between what front-line end users understand about mobility and it's impact on end users, customers and operations, versus what IT may understand. This is an opportunity for both better communication between the groups, and better tools for IT to gain visibility into issues which end users see but may not report.

Lost End User Productivity due to Mobile Issues is Raising Operating Costs for mobility

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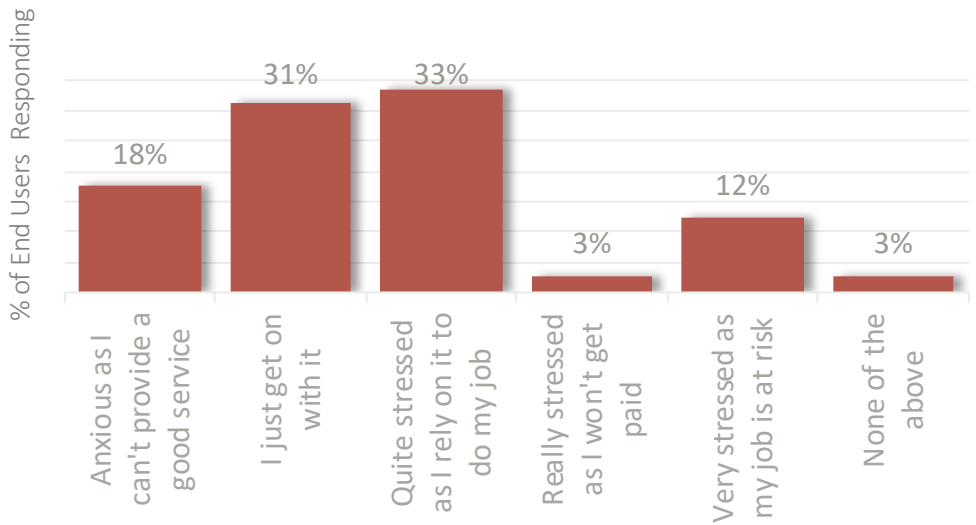
Increased End User Stress due to Mobile Issues is Raising Operating Costs for mobility

IMPACT OF MOBILE ISSUES

66% *of all end users surveyed, who experience issues with their mobile device, say they feel anxious or varying levels of stress when their mobile device has issues and they cannot do their job.*



How end users feel when their device fails in some way and they cannot do their job

Comparison to 2018 Survey

39% *of end users in last year's survey answered the same question saying they felt anxious or various levels of stress. The figures above represent an increase year-over-year.*

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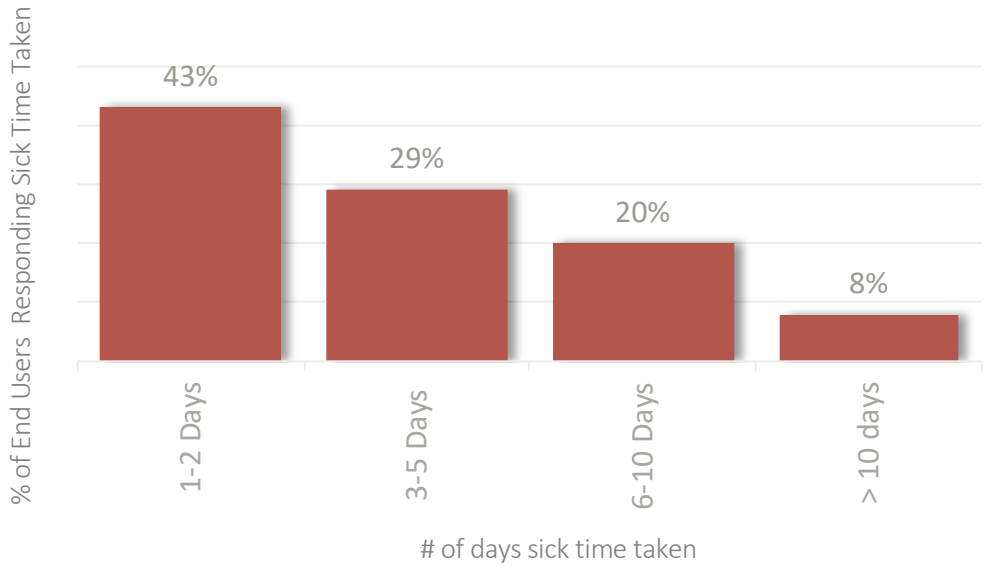
IMPACT OF MOBILE ISSUES

37% *of all of end users surveyed who experience mobile issues admit to taking at least one day off work due to the stress of not being able to do their job due to mobility issues.*



Comparison to 2018 Survey

16% *of end users in last year's survey answered the same question saying they took time off work due to stress related to mobile issues. Further comparison to last year, 28% of those admitting to taking sick time took 1-2 days.*

Sick Time Due To End User Stress over Mobile Issues is Raising Operating Costs for mobility

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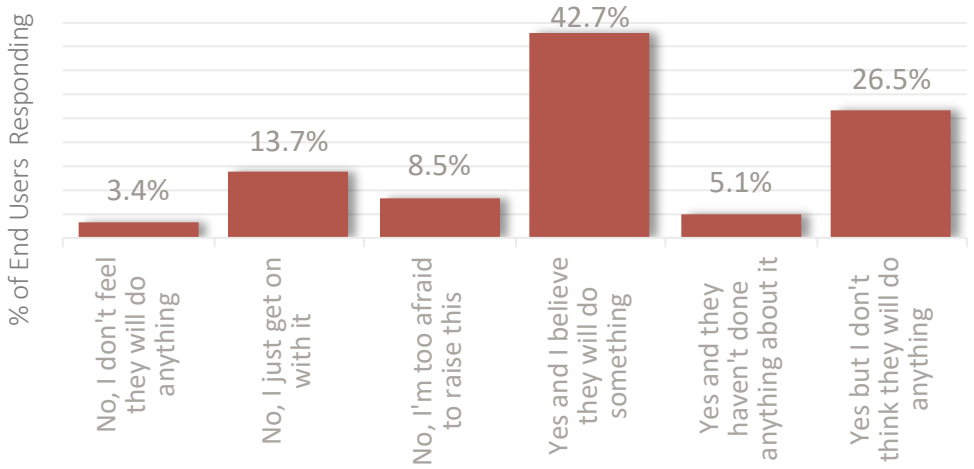
Almost 75% of end users are reporting the stress & anxiety they feel over mobile issues, but almost a third have no belief anything will be done.

IMPACT OF MOBILE ISSUES

74% *of all end users surveyed, who experience stress and anxiety over issues with their mobile device, are reporting this to management. 30% of these respondents, however, feel nothing will be done.*



Have you raised your feelings of stress over your issues with mobile devices and applications failing you in some way?

Comparison to 2018 Survey

31% *of end users in last year's survey answered the same question stating they had reported their stress and anxiety. This year's survey shows a dramatic improvement in end users speaking out on issues. 33% of last year's respondents felt nothing would be done.*

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IMPACT OF MOBILE ISSUES

lost employees **29.4%**

almost 30% of end users experiencing issues with their mobile devices said end users are leaving to find better jobs due to mobile issues

Replacement cost of finding new employees may be hidden from internal cost calculations on the total cost of mobility.

10%

of IT workers acknowledged end users leaving is an impact of mobile issues, highlighting a potential gap between front-line end users and IT on the impact of mobile issues.

Employers are losing end user employees over mobile issues.

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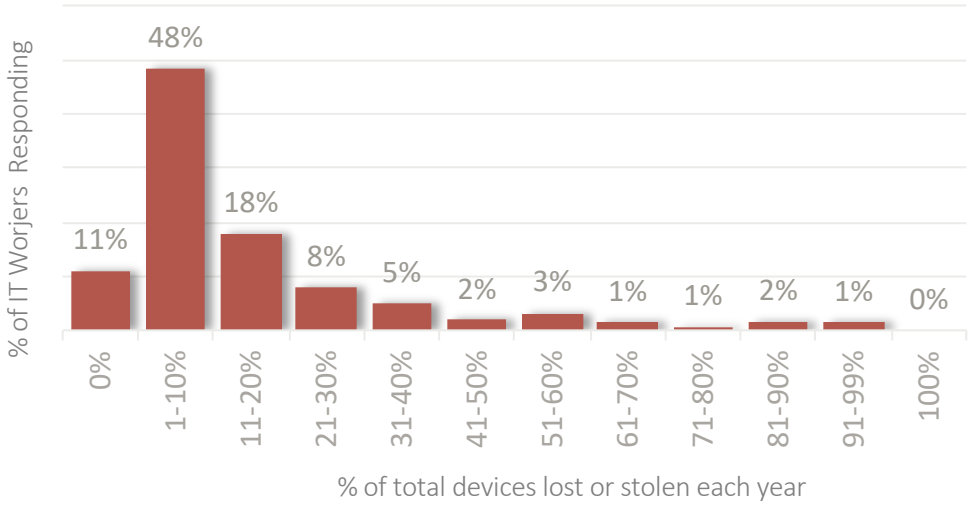
IMPACT OF MOBILE ISSUES

Lost or Stolen devices represent a cost-burden on the business for both capital and operating expenses

89% *of IT workers admit to some level of lost or stolen devices each year.*



1-10% *of devices are reported lost or stolen each year by almost half of all IT workers responding to our survey.*

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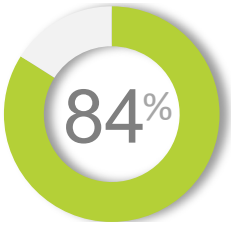
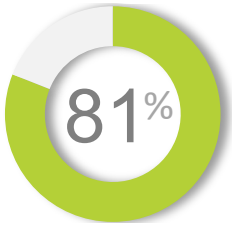
IT MOBILITY MANAGEMENT

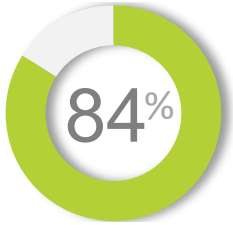
Of All IT Workers Surveyed:



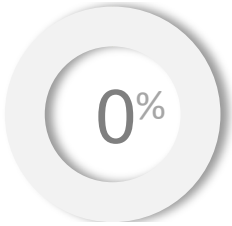
believe they've been given the tools they deserve and need to support mobile end users.



believe they have enough manpower to deal with mobile end-users' problems.

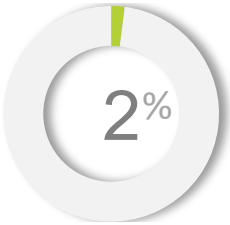


have tools in place to get real-time alerts and monitor issues on critical IT assets like routers, switches, LAN equipment, etc.



have tools in place to get real-time alerts and monitor issues on mobile devices.

have an MDM / EMM in place to manage their mobile devices, apps, content and users.



get all the analytics they need to manage mobility from their MDM / EMM solution.

What IT Resources are deployed to manage & troubleshoot mobile devices, apps and end users?

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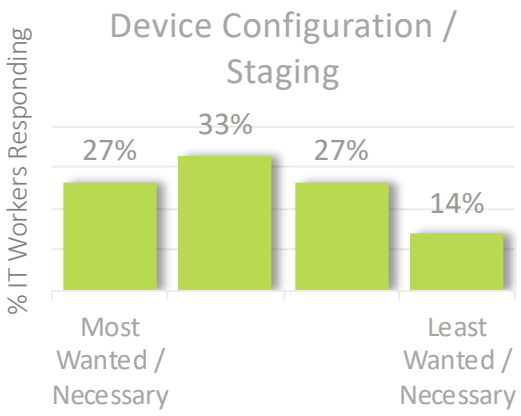
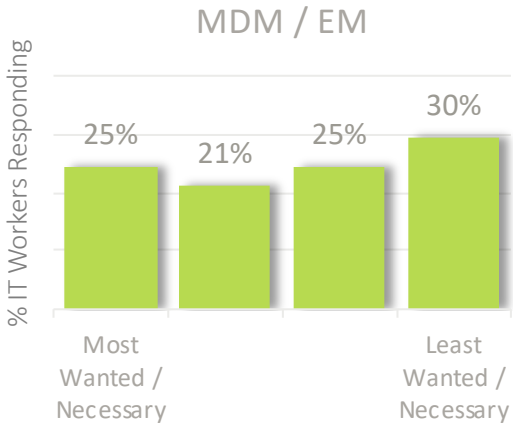
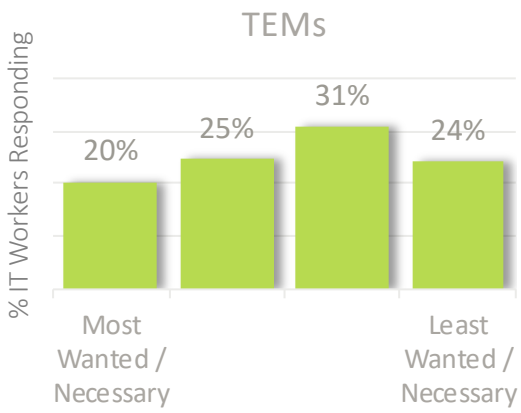
IT MOBILITY MANAGEMENT

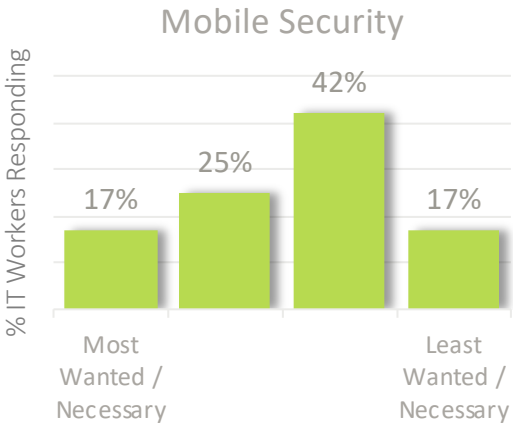
Perceived Value by IT of Software Tools to manage and troubleshoot mobile devices, apps and end users

When IT Workers were asked to rank the tools most wanted / necessary to perform their job with enterprise mobility:



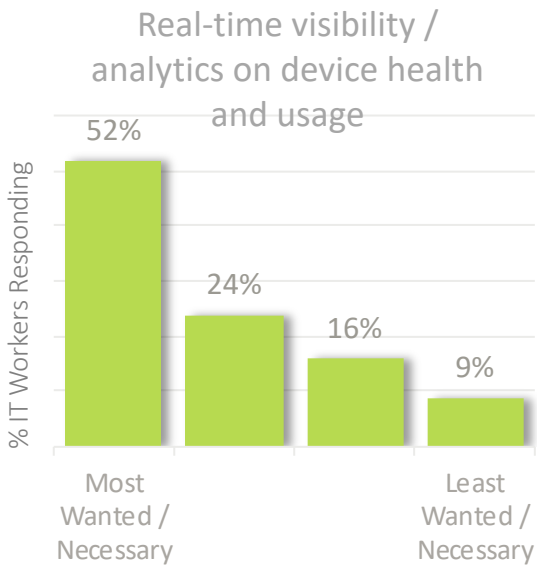


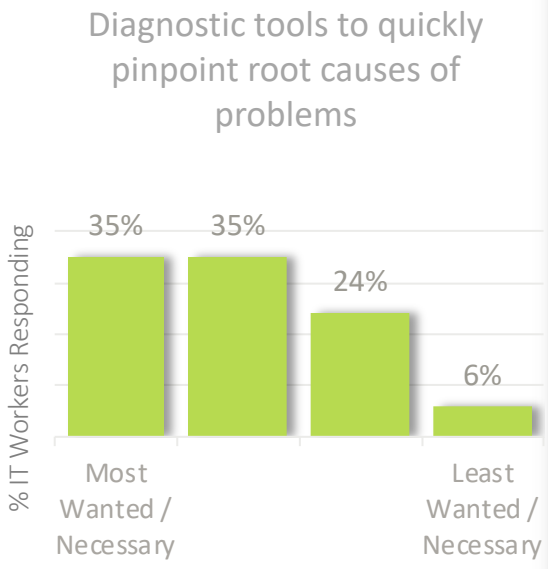




IT MOBILITY MANAGEMENT

When IT Workers were asked to rank the tools most wanted / necessary to perform their job with enterprise mobility:





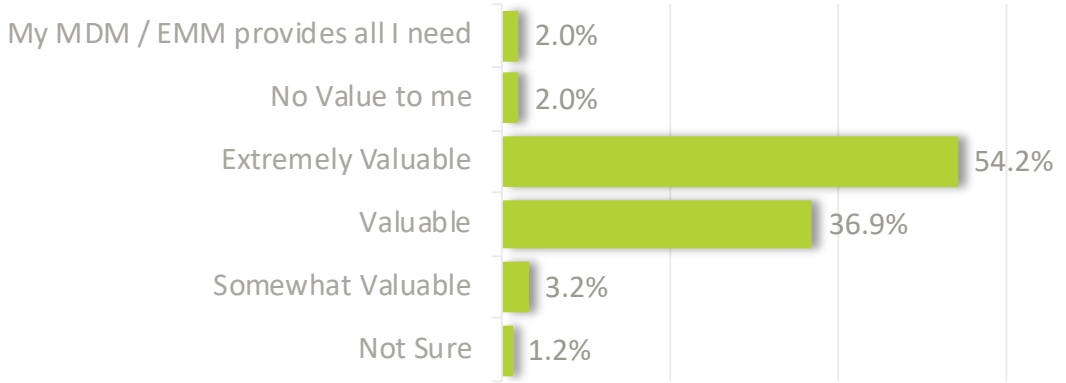
Perceived Value by IT of Software Tools to manage & troubleshoot mobile devices, apps and end users

Perceived Value by IT of Software Tools to manage and troubleshoot mobile devices, apps and end users

IT MOBILITY MANAGEMENT

When IT Workers were asked to rate a tool that "went beyond MDM / EMM to give real-time visibility and alerts to issues affecting end users":

91% *rated this as Valuable or Extremely Valuable, with Extremely Valuable selected by 54.2% of all IT workers.*



New tools in the market which address how to better spot problems in real-time, and proactively resolve them, have high scores in the survey indicating potential desire by IT for new tools to troubleshoot mobility.

B2M

SURVEY METHODOLOGIES

B2M conducted an online survey of over 550 companies in July, 2019 using a third-party, independent market research / survey provider. The pool of end user survey respondents were screened by the provider to ensure they depend on a mobile device to do their job daily, while IT worker survey respondents were screened to ensure they were in charge of supporting mobility in an enterprise with a minimum of 500 mobile devices.

Survey respondents were compensated for their input, with control over compensation methods and payment handled by the 3rd party provider with no input from B2M. To ensure no bias was introduced into the results, B2M had no direct contact or influence over survey respondents in any way nor were respondents aware the survey was conducted by B2M.

Survey Details:

- Average # of devices supported within each enterprise surveyed: 3,880
  - Average # of rugged devices supported: 1,946
  - Average # of rugged devices supported: 1,934
- Total number of devices under management represented in survey: 966,215
- Respondents were split between the following vertical market segments:
  - Government (including Public Safety, Military): 9%
  - Healthcare: 22%
  - Manufacturing: 20%
  - Retail: 15%
  - Telecommunications / Broadcast Services / Technology / Engineering: 12%
  - Transportation / Logistics: 7%
  - Utilities: 6%
  - Others (Agriculture, Food & Beverage, Hospitality, Construction, Automotive, Financial Services): 8%

ADDITIONAL INFORMATION

Since 2002, B2M Solutions has been providing the tools those in charge of mobility deserve to deploy and manage enterprise mobility. The company's inaugural product, mprodigy, is an MDM solution still used by large enterprise customers today.

B2M's Real-time Visibility / Analytics solutions, Elemez, was developed as the company saw the shift beginning towards widespread use of mobility and the evolving business-critical needs to manage mobile devices in real-time. Elemez is used by enterprise customers around the world to go beyond MDM and ensure support of mobility can shift from reacting to end-users' problems after they occur (when they are by definition suffering lost productivity and other costs), to giving the real-time visibility needed to proactively manage all devices and users.

Elemez processes billions of real-time events for our enterprise customers, to ensure they always have an up-to-date view of every device's health and utilization across their mobile network.

Elemez works side-side with mprodigy or any other MDM solution to ensure our customers have the best of both solutions are are able to meet the day-day management of mobility with both sets of tools.

To learn more about our solution, please visit us at https://b2msolutions.com

And to dive deeper into the costs of mobile outages in your network, please use our free True Cost of Ownership tool online for a quick benchmark, followed by a more in-depth analysis by one of our mobility specialist if you desire: https://b2msolutions.com/elemez-true-cost-of-ownership/