3rd annual STATE OF ENTERPRISE MOBILITY SURVEY and REPORT

9 Nov 2020
Welcome to the 3rd Annual State of Enterprise Mobility Survey and Report. This year’s survey includes both IT Workers tasked with supporting mobile devices and apps and frontline workers who depend on their mobile device(s) to perform their tasks and job daily. The survey includes respondents from the U.S., Canada, the United Kingdom, France, Italy, Germany, and Spain.

Key findings from this year’s report include:

1. Despite enterprises’ growing dependence on reliable mobile devices and applications, the number of mobile issues occurring monthly and affecting end-users / workers’ ability to do their job daily has increased by 16% since last year’s survey.

2. Over 2/3rds of all workers in this year’s survey report having at least one issue a month with their mobile device or mobile apps that keeps them from doing their job.

3. 50% of all workers say issues happen weekly that keep them from doing their job.

4. 85% of all workers never report these issues with their mobile devices to IT, leaving IT blind to problems and unable to easily and quickly fix common issues across device and application stability.

5. These mobile issues are negatively affecting enterprises with lost productivity, increased costs, lost revenue, lost customers, and an increase in stress and anxiety. The total costs related to these issues over 5 years are likely 80% or higher of the enterprise’s True Cost of Ownership of mobile devices.

6. 97% of enterprise IT teams surveyed use an MDM / EMM, but only 2% of IT workers surveyed feel these tools give them the visibility needed to proactively manage and control the mobile issues negatively affecting workers daily.
7. **87% of IT respondents in the survey this year report they use tools for proactive management and real-time alerting to problems for critical IT assets such as routers, servers and switches, but do not have similar tools for mobile devices.**

8. **The vast majority of IT workers in our survey see value in new ways to proactively manage mobility and give them the real-time visibility, intelligence and control they enjoy with all other business-critical IT assets but are sorely missing with mobile devices.**

This year’s survey did explore the effects of COVID-19 related to IT’s increased workload as more workers are remote and seeking help with their mobile devices. We do not find COVID has had a significant impact to the overall survey results this year except as noted. As COVID continues to impact enterprises this warrants further study.

We hope this year’s survey brings critical insights and value to the ongoing discussion of how to better manage the business-critical mobile devices and apps across your enterprise.

At B2M, we welcome any inquiries related to these survey results and how our SaaS solutions can give your teams the visibility and control needed to proactively eliminate mobile issues affecting your workforce and improve the overall ROI on mobile investments in devices and apps.

B2M Solutions
[www.b2msolutions.com](http://www.b2msolutions.com)

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SURVEY RESULTS: MOBILE ISSUES
SECTION 1: Mobile Device & Application Issues

Reliable mobile devices and applications are critical to today’s frontline workers. Whether your workers are in manufacturing, warehouse & logistics, field service, field sales, emergency services, retail or virtually any other frontline job, they depend on their mobile device and apps to do their job hourly.

So what happens when issues keep workers from being able to use their devices and apps?

In this section of the survey, we explore how often issues occur from both IT and workers’ perspectives.
of all workers have at least one issue per month that keeps them from using their mobile device.
2/3rds HAVE MOBILE ISSUES EACH MONTH IMPACTING THEIR JOB

When asked how often their mobile device or applications has an issue that keeps them from being able to do their job, 67% said it happens at least once per month.

This means that over 2/3rds of a company’s mobile workforce may not be able to do their job at least once per month as their mobile device or app has issues keeping them from working.
85% of all mobile issues affecting mobile workers go unreported each month to IT.
IT SURVEY:

ONLY **15%** OF ISSUES ARE REPORTED

When surveyed, over half of all IT managers stated that 10% or less of their total mobile workers report a problem to IT each month – far below the 67% of workers in our survey who said they have issues monthly.
“How often do each of these common issues occur?”
Of the workers who experience problems each month:

- **70%** reported poor or unstable WiFi or mobile coverage.
- **63%** reported their mobile device battery drains very quickly.
- **62%** reported the mobile apps they use often crash.

Other responses from the worker survey include:

- **44%** Device reboots itself for no apparent reason.
- **29%** Lost or Stolen device cannot be located quickly and used.
- **25%** Physically broken / damaged and not repaired.
50% of all workers have at least one issue per week that keeps them from using their mobile device.
So far, we’ve focused on the number of issues occurring each month.

But when we asked workers about incidents per day / week, over half of this year’s respondents stated they have at least one issue per week that keeps them from using their mobile device and doing their job.

- 64% Poor or Unstable WiFi / Cellular Connections
- 66% Battery life issues
- 52% Mobile apps crashing
“How has the number of times your device has issues each month changed over the last 12-18 months?”
When surveyed, almost half of all IT managers reported an increase in the number of user-reported monthly mobile issues over the last 12-18 months. A breakdown by % of all IT workers responding is shown below.
“How often do you have a lost or stolen device which cannot be located quickly and used?”
WORKER SURVEY:

40%

REPORT ANNUAL LOSS

40% of all workers admit to not being able to quickly locate a lost / stolen device at least once per year.

15% of all workers admit it happens weekly which of course impacts productivity.

IT’s response below highlights much of this is never reported, or possibly only reported when the device cannot be found.
“How often do batteries not last an entire shift?”
As shown previously, battery life is one of the most common issues reported by both IT and mobile workers in our survey. When surveyed, 77% of all IT workers stated batteries do not last an entire shift as shown below.
“When you receive a support call or ticket related to battery issues how do you troubleshoot / fix?”
With battery life being such a common issue, we asked IT how they go about troubleshooting and resolving the issues end-users report. Over 1⁄2 of all IT surveyed this year replace either the battery or device as their primary means of resolution.

- 51% report replacing battery / device
- 31% replace the battery when end-users experience problems
- 20% replace the entire device to better troubleshoot the issue
“To prevent future battery problems do you proactively replace batteries with new batteries in devices over a certain age?”
This year’s survey asked IT if they have a program in place to proactively replace batteries after a period of time in use in an effort to prevent future battery issues. 85% of all IT respondents said yes, and provided additional information on their schedule for replacing batteries.
“Has COVID-19 Increased the number of workers you need to support?”
Over half of IT responding to this year’s survey increased headcount by 20% or more due to COVID.
Issues:

KEY LEARNINGS

What can we learn from this year’s survey?

1. Mobility is failing end-users / workers far more than being reported to IT with help-desk and support calls and tickets. Over 2/3rd's of the workforce may be impacted each month, and 50% weekly due to mobile issues which keep them from being able to do their job.

2. Network connectivity, battery life and application stability are the top three issues again this year just as they were in last year’s study.
3. It’s getting worse each year, with workers and IT admitting to more problems than the past year.

4. COVID may be a contributing factor, but given this is the 3rd year of this survey, the overall growth trend over the last three years in the increase in unseen issues, as well as the most common issues, is consistent. We therefore do not believe COVID has dramatically shifted the overall findings.
SURVEY RESULTS:
IMPACTS OF MOBILE ISSUES
As outlined in the last section, mobile workers say they have far more issues each month than they report to IT. This creates a gap between what they experience monthly and what IT is made aware of.

What are the impacts of these issues?

In this section of the survey, we explore the impacts issues are having on the business as well as to workers and IT.
“What is the impact to your company of mobile device issues?”
Both IT and mobile workers reported the same top-5 impacts to the company due to mobile device / app issues:

<table>
<thead>
<tr>
<th>Impact</th>
<th>IT Survey</th>
<th>Worker Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lost Worker Productivity</td>
<td>58%</td>
<td>49%</td>
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<tr>
<td>Increased Worker Stress</td>
<td>52%</td>
<td>39%</td>
</tr>
<tr>
<td>Increased Costs</td>
<td>58%</td>
<td>49%</td>
</tr>
<tr>
<td>Lost Revenue</td>
<td>41%</td>
<td>18%</td>
</tr>
<tr>
<td>Lost Customers</td>
<td>35%</td>
<td>18%</td>
</tr>
</tbody>
</table>
“What is the average time it takes to troubleshoot and resolve each mobile issue?”
### Worker & IT Survey:

**30 Minutes or Longer to Fix**

The majority of respondents report it takes 30 minutes or longer to resolve issues – time they typically cannot use their device.

88% of IT reported it takes 30 minutes or longer to troubleshoot and resolve issues.

67% of workers reported it takes 30 minutes or longer to fix themselves or for IT to fix the problem.

<table>
<thead>
<tr>
<th>Average time to resolve</th>
<th>% of IT Surveyed</th>
<th>% of Workers Surveyed</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 30 minutes</td>
<td>12%</td>
<td>33%</td>
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<tr>
<td>31-60 minutes</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>61-120 minutes</td>
<td>37%</td>
<td>21%</td>
</tr>
<tr>
<td>121-180 minutes</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>181+ minutes</td>
<td>3%</td>
<td>11%</td>
</tr>
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</table>
“ If your device has issues and cannot be fixed remotely, what do you do? ”
WORKER SURVEY:

**41%**

**GO BACK TO USING PEN & PAPER**

A common metric in the world of enterprise mobility is the % of problems reported which can be fixed “in the field” allowing workers to continue to do their job. But what happens when this fails and workers have to innovate and find new ways to continue to do their job?

- Use pen / paper backup until I get a replacement in 2-7 days: 5.65%
- Use pen / paper backup until I get a replacement overnight: 11.84%
- Swap with a backup device readily available in my office / field office: 32.69%
- Use pen / paper backup until I can return to the office: 23.67%
- Return to office to get a replacement or repair: 21.73%

% of All Workers Surveyed
“How do you feel when your device fails in some way and you cannot use it to do your job?”
The majority of all workers surveyed reported feeling anxiety or stress when they can’t do their job due to a mobile issue.

These impacted workers reported additional feelings or concerns over mobile issues as shown below.

- My job is at risk or I won’t get paid: 21%
- I can’t provide good service: 26%
- I rely on it to do my job: 53%
“Have you raised your concerns or feelings about being stressed or anxious due to mobile issues?”
Almost 70% of workers in our survey who admitted feeling stress and anxiety over the issues with their mobile device and apps say they have reported their concerns to their employer.

28% of these workers feel nothing will be done despite the majority of them reporting their concerns.

Survey results of workers feeling stress / anxiety:

- 70% have reported their concerns.
- 38% have reported and believe something will be done.
- 8% have reported, and nothing has been done.
- 8% have not reported due to fear of raising the issue.
“How often, if ever, has a customer become angry or rude because you weren’t able to help them or you were late as a result of a problem with your mobile device?”
WORKER SURVEY:

44% FACE ANGER & RUDENESS

44% of all workers surveyed experience angry or rude customers as a mobile issue keeps them from being able to service the customer on-time and as the customer expects.

When asked how often this occurs, the % of all workers who responded are:

- 33% One or more times a month.
- 18% One or more times a week.
- 7% One or more times a day.
- 13% Not yet, but it's only a matter of time.
“In the last year, have you taken time off work because of the stress or anxiety from not being able to do your job as a result of your mobile device problems?”
WORKER SURVEY:

30% ADMIT TAKING TIME OFF

When surveyed, 30% of all workers admit to taking at least one day off in the last year they attribute to stress and anxiety associated with mobile issues, and another 17% would like to, but are afraid of being fired or can’t afford to. It’s getting worse. Our 2019 and 2018 studies had 21% and 16% of all workers admitting to taking time off work due to stress & anxiety.
“When replacing a mobile device's battery, what percentage of these "bad" batteries may be healthy, with root cause being hard to diagnose due to lack of tools available for remote diagnostics on device? “
IT SURVEY:

92% REPLACE HEALTHY BATTERIES

Only 8% believe they never replace healthy batteries. The rest admitted to the following % of likely healthy batteries being replaced unnecessarily due to a lack of proper remote diagnostic tools.

Over 68% admit 25% or more of replaced batteries are healthy.
“What percentage of replaced devices sent in for repair result in No Fault Found / No Trouble Found?”
IT SURVEY:

64% HAVE 10% OR HIGHER NTF / NFF

The replacement of a device in the field can be a costly event, requiring a level of spare pool inventory of devices, and the labor and shipping costs of handling each RMA. A key measurement of the impact of issues is how often these RMAs are done for healthy devices not really requiring replacement.
“What percentage of end-users / management complain monthly about the level of service you provide to end-users and their mobile device issues?”
IT SURVEY:

55% REPORT 20% OR LESS COMPLAIN

It’s interesting to compare these results with the question asked about what % of end-users report issues each month to IT. Over 92% of IT survey respondents in that question stated on average 20% of their total end user population reports an issue. It’s interesting to see the same % of population figure used here as well and warrants further study.
“How do these complaints make you feel about your job supporting mobility?”
Workers aren’t the only ones in our survey this year feeling stress related to mobile issues. IT was asked about the complaints they receive on mobile issues each month, and how these complaints make them feel.

- **Anxious**: 12%
- **Quite or Really Stressed**: 25%
- **Very Stressed. My job is at Risk**: 16%
“What is the commercial impact of the issues highlighted in this survey?”
ISSUES CAUSE 80% OF TRUE COSTS OF MOBILITY

Some of the Issues & Impacts driving these costs include:

- Productivity losses due to devices not working or time taken off of work
- Expensive, and Unnecessary, Battery Replacements
- RMAs resulting in No Trouble Found
- Lost & Stolen Devices

Total Cost of Ownership models from VDC and others are not new and are relied on by the industry to make decisions about what devices to purchase.

These traditional models have shown that issues impacting end-users can easily make up 80% or more of the 5-year costs of owning and operating a device.

This survey highlights numerous issues & impacts which play into these figures, and if controlled, can dramatically lower the costs of ownership.
KEY LEARNINGS

What can we learn from this year’s survey?

1. Issues with mobile devices and applications are negatively impacting businesses through lost worker productivity, increased stress, increased costs, lost revenue and lost customers.

2. Productivity loss is a “hidden” cost to Finance, but with the majority of survey recipients reporting downtime of 30 minutes + per issue and the volume of issues as highlighted in the Issues section of our report, this cost can be significant as workers are paid to not be able to do their job as their mobile device is unavailable.
3. It’s surprising how paper and pen backup systems are still normal despite the investment and growth in mobility. This likely has additional costs not exposed in this year’s survey on productivity and customer experiences.

4. Proactive battery swaps to avoid future problems is surprisingly common at great costs to businesses. Solutions which accurately identify swaps only when needed have huge potential cost savings.

5. All of the above, combined with No Trouble Founds due to a lack of visibility into root causes of issues add up to considerable costs to business as part of the True Costs of Mobility calculations available from B2M and others.
SURVEY RESULTS:

TOOLS TO MANAGE MOBILITY
For many years, IT departments have managed critical IT assets in real-time, receiving alerts and warnings anytime a critical piece of equipment has a problem which could affect service delivery for end-users and customers.

Switches, routers, line termination equipment, servers, access points and other key voice, data and computing resources are all managed proactively for issues to ensure availability and reliability for all users.

In this section, we explore the use of management tools and how mobility is managed today. We also explore desire for new ways to manage mobility which mirrors the proactive, real-time tools used for all other mission-critical IT assets.
“Does your company currently use a tool to get alerts and/or monitor issues on critical IT assets like routers, switches, servers, etc.?”
The technologies and understanding of network & equipment management using SNM, and other protocols is mature in the world of IT.

And our survey results reflect the fact that IT is monitoring and managing critical IT assets like servers, routers, switches and other key infrastructure used in business operations in real-time.
“Do you use an MDM / EMM tool to manage mobile devices?”
The primary workhorse in enterprise mobility management continues to be MDM / EMM tools. These tools are designed to manage the ongoing configuration changes required for day-to-day device operations.

As shown in this survey, with 85% of all issues going unseen, and 2/3rds of mobile workers experiencing outages on their device at least once per month affecting their productivity, it may be time to rethink the tools used to manage mobility.
“Does your MDM / EMM tool give you all the analytics you need for real-time visibility and alerts on critical mobile issues affecting end-users?”
Despite MDM tools being almost universally deployed across the enterprise, IT respondents in our survey recognize MDM tools do not give them the visibility they need to proactively spot issues as they occur.

In sharp contrast to all other critical IT assets, enterprise mobile devices have historically been unable to report issues.

And with only 15% of all issues manually reported by end-users, IT can’t fix what they can’t see.
“If you had a tool that went beyond MDM / EMM to give you all the analytics needed for real-time visibility and alerts on critical mobile issues affecting end-users, how valuable would that be?”
Enterprise mobile devices are just as business-critical as other critical IT assets, and our survey shows a recognition by IT in the value of getting better visibility over mobile device issues and usage to proactively take control and improve the experience for mobile workers.
Impacts:

KEY LEARNINGS

What can we learn from this year’s survey?

1. Real-time monitoring of critical IT assets like servers, routers, switches and other devices necessary to provide voice, data and computing services to the enterprise is common, with 87% of all companies acknowledging they use tools to proactively catch and fix problems.

2. Solutions to do the same real-time monitoring of critical mobile device assets have not been deployed, yet these mobile devices in the hands of workers are business-critical for virtually every aspect of the business.
3. 97% of companies use MDM / EMM tools as their main toolkit for managing mobility. But only 2% of these same companies believe these tools are giving them the visibility they need to see and control issues affecting workers.

4. Almost 100% of companies in our survey desire a solution to give them the same level of real-time visibility for mobility they use with all other critical IT assets.
SURVEY RESULTS:

YEAR OVER YEAR (YOY) TRENDS
Year-over-year COMPARISON

What are the key differences year-over-year between this year’s 3rd annual survey and last year’s survey?

| % of all workers having at least one issue per month that keeps them from using their mobile device. |
|---|---|
| 3rd Annual Survey | 2nd Annual Survey |
| 67% | 51% |

| % of all issues affecting mobile workers which go unreported each month to IT |
|---|---|
| 3rd Annual Survey | 2nd Annual Survey |
| 85% | 80% |

| % increase in the number of end-user reported monthly mobile issues to IT over the last 12-18 months |
|---|---|
| 3rd Annual Survey | 2nd Annual Survey |
| 48% | 37% |
Year-over-year Issues

What are the key differences year-over-year between this year’s 3rd annual survey and last year’s survey?

% of IT proactively swapping batteries after time in use to prevent future battery-related problems.

3rd Annual Survey: 92%
2nd Annual Survey: 88%

% of IT reporting No Trouble Founds (NTF) / No Fault Founds (NFF) > 10%

3rd Annual Survey: 64%
2nd Annual Survey: 56%

% of workers taking at least one day off work due to the stress and anxiety from not being able to do their job as a result of mobile issues

3rd Annual Survey: 30%
2nd Annual Survey: 21%
% of companies in survey using an MDM / EMM to manage mobility:

- 3rd Annual Survey: 97%
- 2nd Annual Survey: 96%

% of IT reporting their MDM / EMM tool gives them the real-time visibility they need to proactively monitor and spot mobile issues:

- 3rd Annual Survey: 2%
- 2nd Annual Survey: 2%

% of IT perceiving value in having a real-time tool to go beyond MDM / EMM and provide the real-time visibility needed over mobility:

- 3rd Annual Survey: 96%
- 2nd Annual Survey: 91%
SURVEY RESULTS:

DEMOGRAPHICS & SURVEY METHODOLOGIES
3+ million Devices under management by IT respondents in our survey

33% United States & Canada
33% France, Italy, Germany & Spain
33% United Kingdom

Size of Company Responding to Survey

<table>
<thead>
<tr>
<th>Size of Company</th>
<th>% of IT Surveyed</th>
<th>% of Workers Surveyed</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000+ employees</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>5,000 – 9,999 employees</td>
<td>14%</td>
<td>69%</td>
</tr>
<tr>
<td>2,500 – 4,999 employees</td>
<td>26%</td>
<td>5%</td>
</tr>
<tr>
<td>1,000 – 2,499 employees</td>
<td>34%</td>
<td>5%</td>
</tr>
<tr>
<td>500 – 999 employees</td>
<td>12%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Industry / Sector of Company Responding to Survey

Utilities (Gas, Electric, Water, Transportation / Logistics... Retail / eCommerce Manufacturing Healthcare Field Services Emergency Services / Public.

66% Rugged Devices
34% Non-rugged Devices
Survey conducted in September, 2020, by a 3rd party research firm managing all panel selection and surveys to both IT managers and frontline workers who depend on their mobile device to do their job.

Total survey size: 1,505 companies surveyed across the United States, Canada, the United Kingdom, France, Italy, Germany and Spain. Roughly 50% of the companies were given the IT survey and 50% were given the mobile worker survey. Size of companies, industry sectors and geographic splits are outlined in the previous pages.

All survey respondents were screened for minimum qualifications on company size, number of mobile devices in use in their enterprise, and their job requirements related to mobility.

Survey results provide a minimum 95% Confidence Level with a 4% margin of error.
To learn more about our company, B2M Solutions and our SaaS solution Elemez which is providing the real-time visibility and control needed to tackle many of the problems outlined in this survey, please visit: www.b2msolutions.com.

About B2M Solutions:

B2M Solutions™ is a global software company dramatically improving how enterprise mobility is operated and managed. The company’s flagship product, Elemez™, provides real-time actionable analytics and Enterprise Mobility Intelligence for enterprise mobile devices and applications.

Unlike traditional enterprise mobile software management tools used for MDM, EMM and UEM, Elemez proactively identifies, isolates and predicts issues to help enterprises prevent and avoid problems, improve enterprise mobility’s performance and lower the True Cost of Ownership™ of mobility.

Founded in 2002, B2M is a privately held company based in Abingdon, UK, with North American operations in Atlanta, Ga., U.S.A.