MOBILITY IN MOTION:

WHEN TECHNOLOGY TRANSFORMATION MEETS OPERATIONAL INTELLIGENCE

MOBILITY CALLS FOR A GUIDED TRANSFORMATION

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MEASUREMENT, MANAGEMENT AND SECURITY MUST BE OPTIMIZED TO ACHIEVE FULL BUSINESS MOBILITY

Business mobility – which we classify as the extension of remote workforces combined with the need for seamless communication and digital connectivity – has led to a rise in mobile device use in recent years. This includes phones, tablets, printers and other mobile solutions.

As digitization accelerates and organizations expand their mobile workforces and devices, these companies ask various questions; How is this growing set of devices being supported? How can we scale and support this volume quickly? How are they maintained to keep their performance optimized? Are they secure? Is data protected? Is performance being measured? Is productivity increasing?

Mobility management can include assigning one device to an employee for a specific period of time with all applications available. It can also involve shared devices across an ad-hoc pickup and put down method.

For some, a sharing model requires optimized management and monitoring to succeed. For others, it is an employee having access to a range of business applications through one device. The key issues here revolve around performance measurement and security.

Either way, there must be a level of device management, monitoring and protection to ensure devices work in the field and add value to the business.

This report explores whether field workers' devices around the world are being optimally equipped, monitored and protected in an optimized way to reach their organization's respective digital transformation goals. Of all global respondents surveyed, 91% have a Mobile Device Management (MDM) or Enterprise Mobility Management (EMM) solution in place. However, 73% are struggling to receive data diagnostics and 71% are lacking operational intelligence from their devices. Clearly the MDMs and EMMs being used by many organizations are not providing the productivity data and predictive tools needed to support the digitalization journey.

"Organizations that embrace mobile technology to optimize dispersed workforces face new mobility challenges. They risk issues arising from lack of visibility into mobile device performance, battery health, location, security and more. This will ensure organizational productivity. There is a need for a new set of tools and advanced mobility solutions to understand what is happening in the field."

CONTENTS

METHODOLOGY

SOTI's research spanned 3,650 respondents across the U.S. (600), Canada (350), Mexico (350), UK (600), Germany (350), France (350), Sweden (350), Netherlands (350) and Australia (350). All respondents are full-time or part-time workers operating within companies comprising 50+ employees. All respondents work in IT across different seniority levels including: business ownership, senior management, middle management, management and specialist IT administration. Sector involvement includes: healthcare, financial services, legal, retail, supply chain, transportation and logistics, manufacturing, energy, education, technology and emergency services.

FRANCE

NETHERLANDS

SWEDEN

CANADA   **UK**   **GERMANY**

U.S.

MEXICO   **AUSTRALIA**

The goal of the report is to assess the state of the mobility industry in 2023 by gaining insight from this broad range of sectors and countries. We sought to better understand:

- **How are IT professionals on a global scale utilizing mobile devices within their organizations?**
- **How are they measuring business mobility performance?**
- **What tools are they using and what tools are they lacking?**
- **What is the role of operational intelligence in enhancing productivity?**
- **Where are they on their digital transformation journeys and what do they need to reach their end goal?**

KEY FINDINGS

Through our survey, **91%** of organizations are currently using an MDM or EMM solution, but **74%** state they need better tools to predict issues ahead of problems occurring.

81%
Think productivity can spark investments that would improve levels of real-time visibility into devices

77%
Believe having one mobile device with access to all applications would make their organization's employees more productive

73%
Need better operational intelligence to measure business mobility performance

52%
Say their organizations do not have enough budget to ensure real-time visibility of mobile devices

43%
Are concerned about data leaks from mobile device use, followed by malware, hacking and user error worries

41%
Confirmed their digital transformation journey has begun, but they require a partner to assist them

MOBILITY:
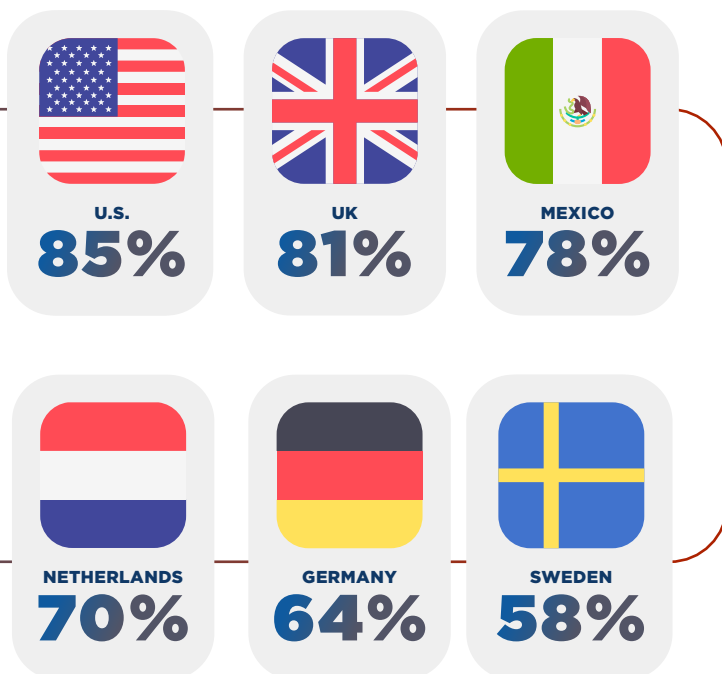## THERE IS NO ONE-SIZE-FITS-ALL APPROACH

We must begin by understanding where companies are on the business mobility journey. From the perspective of employees within these organizations, what is their greatest need from a business mobility perspective?

My organization needs better operational intelligence to measure business mobility performance:

73% AGREE

By Country:

U.S.	UK	MEXICO
85%	**81%**	**78%**

NETHERLANDS	GERMANY	SWEDEN
70%	**64%**	**58%**

By Sector:

RETAIL
80%

TECHNOLOGY
75%

Larger Enterprises (1,000 employees or more) vs. Smaller Enterprises (999 or fewer):

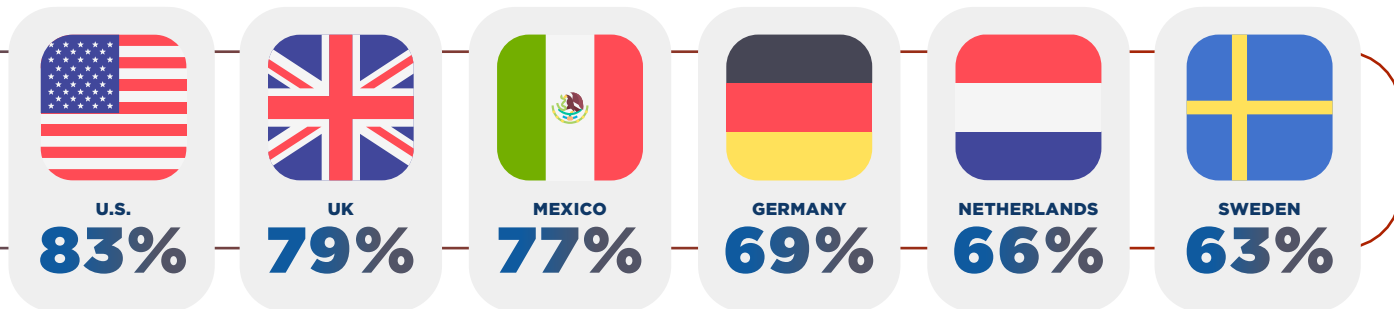1,000 or more employees — **74% AGREE**

999 or fewer employees — **73% AGREE**

My organization needs better tools to predict issues before they become a problem:

74% AGREE

By Country:

U.S.	UK	MEXICO	GERMANY	NETHERLANDS	SWEDEN
83%	79%	77%	69%	66%	63%

By Sector:

RETAIL	TECHNOLOGY	MANUFACTURING
77%	76%	76%

Larger Enterprises (1,000 employees or more) vs. Smaller Enterprises (999 or fewer):

1,000 or more employees — 72% AGREE
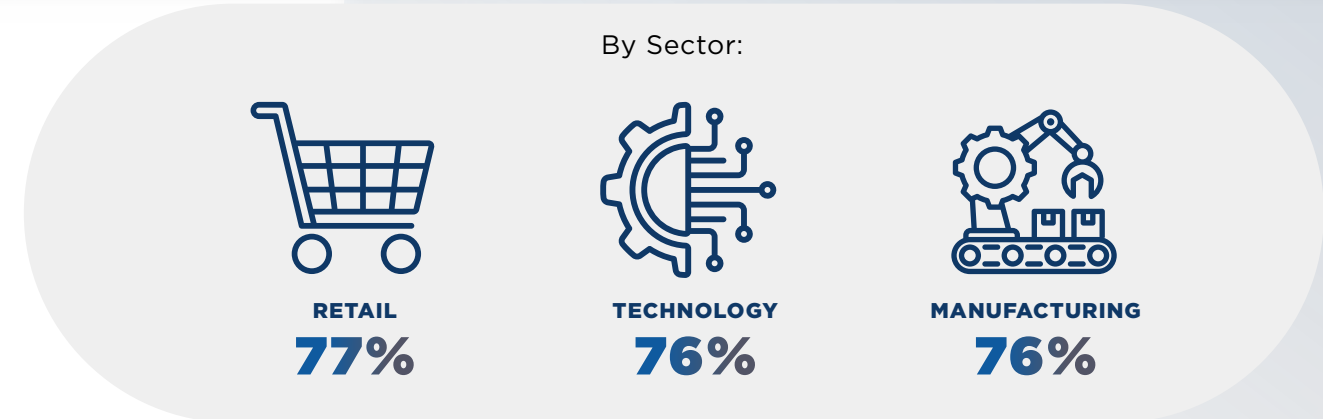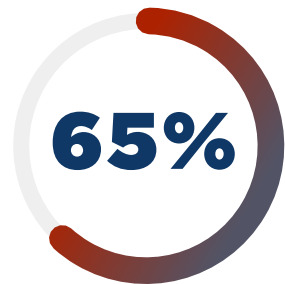
999 or fewer employees — 74% AGREE

The U.S., UK and Mexico show an increase in integrating tools that help enhance operational intelligence, diagnose issues and counter problems ahead of time. An opportunity exists in the Swedish market with 19% of respondents reporting they have not yet adopted an MDM or EMM solution.

The data clearly shows the global drive to improve mobility performance measurement, diagnose issues and preempt problems has continued past the pandemic.

SHARED DEVICES

65% Mobile devices are uniquely assigned to each employee for extended periods of time (e.g., weeks, months)

20% Mobile devices are assigned to an employee for short periods of time (e.g., a day shift)

15% Mobile devices are shared between multiple employees without any assignment (e.g., picking up and using the device without having to register)

For nearly two-thirds (65%) of organizations, mobile devices are assigned to one employee for an extended period of time. This rises to 74% in Mexico, where sharing is even less common. However, Mexico has stated a need for improved diagnosis, monitoring and operational intelligence – which would suggest a preference for a future shared device model.

The Netherlands establishes itself as a mature market for business mobility with 21% of respondents working for organizations that enable device sharing across multiple employees. Allowing workers to pick up and use a device without registering suggests advanced levels of management, monitoring and security.

My organization's employees would be more productive if they could log in once on their mobile devices and have access to all their business apps and websites:

77% AGREE

More than three-quarters (77%) agree with the productivity potential of using one mobile device to access a range of applications. The technology sector (80%) champions this form of mobility.

From a national perspective, the U.S. (87%), UK (86%) and Mexico (86%) all seem to have earmarked this mode of mobility as the way to enhance business mobility moving forward.

Regardless of the approach to ensuring more mobility through altered device management, security remains a primary focus. The data below highlights the primary security concerns:

Data Leaks	**43%**
Accidental Data Loss	**42%**
Vulnerability to Malware	**42%**
Lost/Stolen Devices	**42%**
Employees Using Weak PINs or Passwords	**41%**
Unsecured Communications Over Public Wi-Fi	**36%**
Criminals Accessing Our Network/Holding Us to Ransom	**29%**

However an organization looks to enhance its level of mobility, whether through shared or singularly assigned devices, it is the connectivity, management and real-time visibility of the whole infrastructure that determines device efficacy and security.
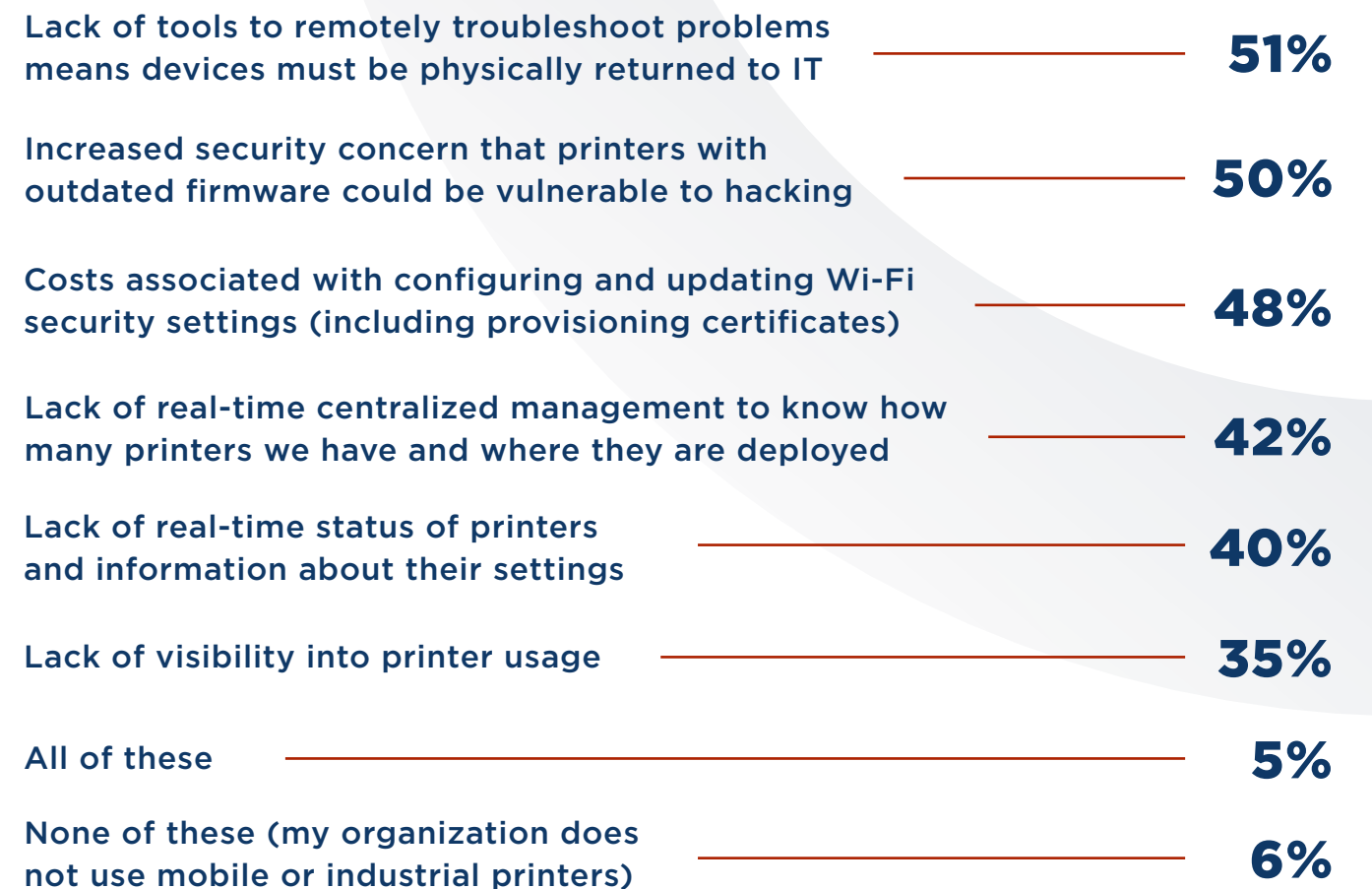
PRINTERS:
A PRIME EXAMPLE OF MODERN MOBILITY CHALLENGES

The role of the printer is changing and has evolved in recent years to enable remote label and receipt printing as part of a dynamic and critical logistics process. Printers are an interesting example of where organizations are struggling to digitally transform, with 42% of respondents stating they lack real-time centralized management and do not know how many printers they have and where they are deployed.

What are the main challenges you have with your mobile and industrial printers?

Lack of tools to remotely troubleshoot problems means devices must be physically returned to IT	**51%**
Increased security concern that printers with outdated firmware could be vulnerable to hacking	**50%**
Costs associated with configuring and updating Wi-Fi security settings (including provisioning certificates)	**48%**
Lack of real-time centralized management to know how many printers we have and where they are deployed	**42%**
Lack of real-time status of printers and information about their settings	**40%**
Lack of visibility into printer usage	**35%**
All of these	**5%**
None of these (my organization does not use mobile or industrial printers)	**6%**

In Mexico and Germany (both 57%), device management and device security shortfalls are a top concern. Mexico (56%) also considers the cost of configuring and updating Wi-Fi settings a key concern. Additionally, the hacking of printers was a primary concern in France (60%) and the U.S. (57%).

Measuring the performance of printers was also included in the list of challenges, which alludes to the fact that printers are not integrated into these organization's MDMs or EMMs:

- **42% globally lack real-time centralized management to know where printers are**
- **40% do not know the status of their printers in terms of settings and configurations**
- **More than one-third (35%) cannot see how much a printer is being used**

There were some surprising national results within the data:

- **Germany responded above the global average (46%) with a lack of real-time status of printers**
- **The Netherlands (45%) also reported above average status monitoring challenges**

Even more mature markets have capabilities gaps. The statistics below show the global breakdown of priorities, signalling where organizations need to improve printer operations.
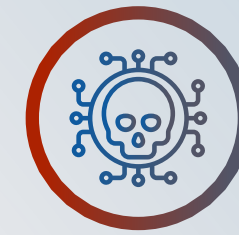
51%
Globally lack the tools to remotely support printers, meaning devices must be physically returned to IT

50%
Globally are concerned that printers with outdated firmware could be vulnerable to hacking
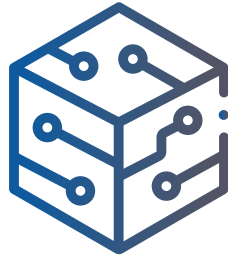
48%
Globally state that there would be costs associated with configuring and updating Wi-Fi security settings. This implies that their current MDM/EMM solution does not support printers

40%
Globally lack real-time printer status and information about their settings

42%
Globally lack real-time centralized management of their printers to know how many they have and where they are deployed

These concerns address the three key areas of management, security and visibility that a more comprehensive EMM solution would effectively address. As such, printers represent the wider mobility challenges organizations encounter. They will continue to be a useful gauge of how organizations are digitizing internal processes, the extent of mobility expansion into the field and the approach to broader business mobility development in the future.

REAL-TIME PERFORMANCE: OPERATIONAL INTELLIGENCE

Can your organization see in real-time which devices are deployed across its network? How well are they performing and are all applications being used? What issues are the devices experiencing most often, and is maintenance and support often required? Is worker or data integrity at risk?

Respondents point to a range of bottlenecks that are potentially preventing their organizations from achieving this much-needed visibility. 'Devices' in this context refer to shared devices and printers to reflect the complex world of mobility.

My organization has not budgeted enough to ensure total real-time visibility of our mobile devices:

52% AGREE

The fact that more than half of organizations have not budgeted enough to ensure real-time visibility of mobile devices is concerning. This number jumps to 62% in the UK, which explains why it scored a high percentage when stating its need for improved issues diagnosis, forecasting and performance measurement.

Retail (62%) is another sector that has clearly identified a need for improvement but lacks the necessary budget.

Senior Managers (62%) were another demographic to report a lack of budget. This demonstrates a strong intent to enact change but a frustrating shortage of resources.

My organization has the budget to achieve this but does not know where to start:

52% AGREE

Throughout the survey, 59% of UK respondents said they would not know where to start, even with the appropriate budget in place. The combination of a low budget and a lack of forward planning correlates with their need for improved solutions. The results were the same in Mexico.

In the Netherlands and France, 29% disagreed, stating they know where to start when an adequate budget is available and how to invest in improved device visibility. Consequently, these countries had higher disagreement rates when asked if better diagnosis, operational intelligence and forecasting were needed.

Awareness of what is possible is holding my company back:

56% AGREE

Global decision-makers in senior positions (74%) brought this 56% global average up considerably. They understand what improved visibility could bring, but there are some doubts:

Productivity is a key driver for our investment in this technology:

AGREE 81%	

Productivity stood out as a key metric that would encourage greater investment into visibility-enhancing solutions. The link between visibility and productivity was most prominently recognized by those in the U.S. (86%), UK (86%) and Mexico (87%). From a sector standpoint, retail expressed the highest level of agreement (85%). Senior Managers (86%) also noted that investment in visibility-enabling technologies would be enhanced if productivity would increase as a result.

The U.S., UK and Mexico, each expressing the most significant concerns regarding the challenges of measurement, diagnosis and forecasting, are also the most eager to gain device and data visibility. Respondents from these countries believe improved visibility will lead to increased productivity and a better understanding of their business – and 73% agree globally.

Visibility of the entire mobile fleet of devices, including shared devices and printers, is an important indicator of where an organization is on its digitalization journey and how far it needs to push technology advancements.

My management team is not convinced the cost is worth the investment:

AGREE 50%	

This is perhaps the most alarming statistic in this report. Half of all respondents believe their management teams cannot see the value in investing in real-time visibility of mobile devices. Even in retail, which has stated its need for improved visibility, 61% reported this lack of management trust in its value. **What would persuade a change of mindset to accelerate adoption of visibility-focused solutions?**

DIGITAL TRANSFORMATION: RELEASING MANUAL RESTRICTIONS

Digital Transformation relies heavily on digital processes at its core. However, one of the biggest obstacles is the prevalence of manual processes. Not only do these processes cause delays, but they can also result in inconsistencies due to human error.

Given that 21% of businesses globally are still using manual paper forms, it is essential for organizations to first assess current digital transformation progress before considering automation. This ensures that business operations and process enhancements are aligned with their existing digital capabilities.

Which of the following key indicators affecting business mobility performance do you wish you could monitor or improve monitoring of?

Data analytics	48%
Remote troubleshooting and issue resolution anywhere	46%
Application usage	46%
Remote push of security updates across all mobile devices	45%
Network and device location usage	43%
User authentication	42%
Battery health	40%
None of the above	1%

Despite the differing maturity levels around visibility, respondents placed data analytics (48%) and remote troubleshooting (46%) at the top of their indicators list. However, there are regional nuances to consider:

- **Application usage is a primary concern in Mexico (54% compared to the 46% average).**
- **The UK listed security updates of mobile devices as a key issue (52% compared to the 45% average).**
- **Germany also prioritized security updates (53%).**

An interesting representation of overall digital transformation can be found in the U.S.:

- **The U.S. cited remote troubleshooting and issue resolution as its main concern (53%).**
- **The U.S. increased the global average in network and device location usage (49%).**

When asked directly about digital transformation, 41% confirmed their organizations have already begun their transformation journeys but require a partner that can help with the process.

This table also confirms that more than one-quarter (27%) of organizations are engulfed in too many manual processes and/or legacy technologies to effectively continue digital transformations. Additionally, more than one-quarter (26%) are worried about having too many employees or devices to make it possible.

A final area of concern was voiced by 59% who said their mobile device portfolio has grown to a point that is too difficult to manage.

Each of these points indicate that there are management solutions that have not been effective in implementing devices tailored for specific purposes. These devices are intended to achieve the following goals:

- **Reduce worker strain**
- **Make processes more efficient**
- **Allow employees to be more productive**
- **Enhance business operations overall**

OPTIMIZING BUSINESS MOBILITY WITH KEY PARTNERS TO REACH YOUR FULL POTENTIAL

Overall, only 9% of organizations believe their digital transformation journeys are complete. This demonstrates that the vast majority see digital transformation as an unending process of improvement, and the remaining 9% need to redefine the process to avoid being left behind.

Most organizations see the potential of management solutions that would assist mobility's impact on productivity and efficiency. However, there are still concerns about whether these organizations can manage, monitor and secure these devices in an optimal way, even with the necessary investments.

This confirms the need for a partner to guide each organization's ongoing path towards optimized business mobility. An expert can aid the integration of new solutions and guide the initial investments relative to the company's bottlenecks and challenges. By removing the fear of wasted investments and ensuring value is being targeted to the most suitable areas, a cultural shift can begin.

The key for organizations is not to strive for an end, but to ensure the next steps and phases are optimized. By enhancing the way remote devices are used, shared, managed, monitored, maintained and kept secure; organizations can reach full mobility potential.

A dedicated digital transformation partner can put organizations on the right path in each of these critical areas. It makes sense that this ongoing evolution of mobility should be guided by the most comprehensive EMM and MDM solutions and a trusted partner.
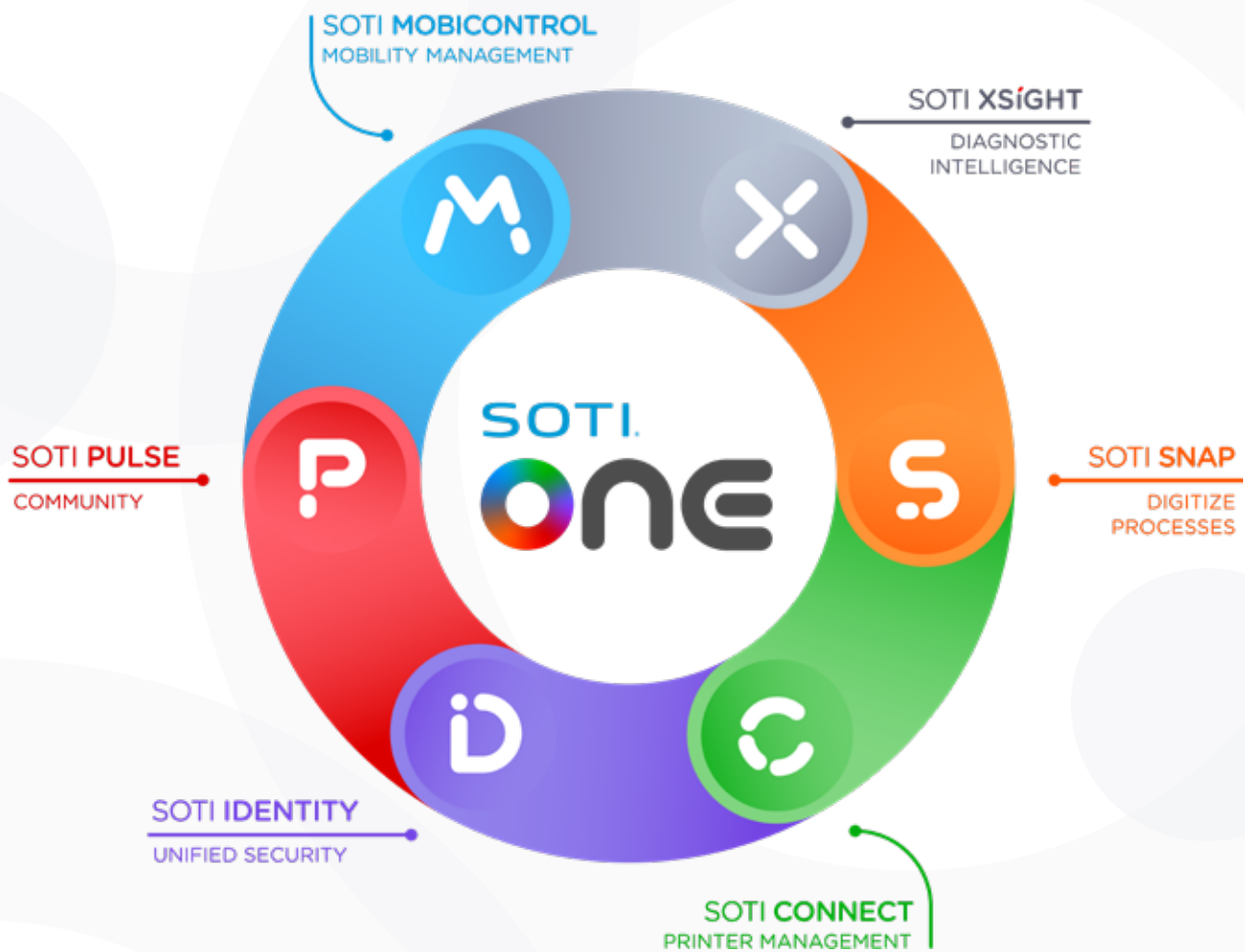
ABOUT SOTI

SOTI is a proven leader at creating innovative solutions that reduce the cost and complexity of business-critical mobility and the IoT. Thousands of companies around the world depend on us to secure, manage and support their mobile operations.

The company's two decades of success has built strong partnerships with leading mobile platform providers and device manufacturers. These relationships give us unparalleled insight into new technology and industry trends before they happen.

A proven innovator, SOTI's clear vision, laser focus and commitment to R&D have made it the market leader at delivering exciting, new business mobility solutions. SOTI helps businesses take mobility to endless possibilities.

TO LEARN MORE:

For additional information on how SOTI can set your business up for success, **click here.**
To learn more about the SOTI ONE Platform, **click here.**
To find out how SOTI can help with your mobile investments, contact us today at **sales@soti.net.**

SOTI is a proven innovator and industry leader for simplifying business mobility and IoT solutions by making them smarter, faster and more reliable. SOTI helps businesses around the world take mobility to endless possibilities.

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