



# **THE MOBILITY EDGE: CDW'S 2012 SMALL BUSINESS MOBILITY REPORT**

**October 8, 2012**

**© 2012 CDW**

# INTRODUCTION



This study finds that small businesses get a competitive lift from their employees' use of mobile devices and that employees mostly deliver it by bringing their own smartphones, tablets and even laptops to their jobs, with small business IT managers working to catch up.

CDW surveyed small businesses in industries with high potential to benefit mobile innovation: construction, food services, manufacturing, professional services and retail.

CDW asked mobile device users and IT management professionals what they can do better now because of mobile devices, how mobile apps could help them do their jobs better, how mobility affects unique aspects of their business and what new challenges they face as they go mobile.



Construction



Retail



Professional  
Services



Food  
Services



Manufacturing

# QUICK LINKS TO KEY FINDINGS



*Click on the area below to learn key statistics.*

How important is mobility?



- Mobile device users believe their companies would lose competitive ground without mobile devices

Mobility: toy or tool?



- Small businesses believe mobile devices make them more efficient

Who's driving this bus?



- Mobile device users want to do many business tasks on their devices, and IT is working to keep up

What's the down side?



- Just half of small business IT managers believe their company has an effective strategy to manage mobile devices

# THE MOBILITY EDGE

- Mobile devices are critical to small business competitiveness

**75%**

of mobile device users agree that mobile device use is **critical** to their job.\*



**85%**

of **construction** mobile device users agree that mobile device use is critical to their job.\*



**67%**

of mobile device users agree that their company would **lose competitive ground** in today's market without mobile devices.\*



**77%**

of **professional services** mobile device users agree that their company would lose competitive ground without mobile devices.\*



**For additional industry-specific information, see pages 19-23.**

\*According to mobile device users; percent that somewhat or strongly agree

# MOBILE DEVICES ENABLE EFFICIENCY

- Small businesses agree: Mobility delivers many benefits, to customers, owners and employees alike

**94%**

of **mobile device users** agree that their use of mobile devices for work tasks has made them more efficient.\*

**85%**

of **IT managers** agree that mobile devices have made their company more efficient.\*\*

## Top mobility benefits:\*\*\*

- 60%** Improved communication between field/office personnel
- 60%** Increased availability to customers
- 55%** Increased employee productivity
- 53%** Provided better customer service
- 45%** Increased collaboration between employees
- 35%** Improved work/life balance
- 34%** Streamlined business processes



*Read about how small businesses are using mobile devices on page 7*

\*According to mobile device users; percent that strongly or somewhat agree \*\*According to IT managers; percent that strongly or somewhat agree

\*\*\*According to mobile device users; respondents asked to select all that apply

# IN THEIR OWN WORDS



- Speed, collaboration and efficiency: Mobile device users share how these devices give their companies a competitive edge

*How have mobile devices changed the way your company operates?*



"It allows us to **reach our technicians in the field** and send them work orders, eliminating the need for them to come to the office." – Construction Program/Project Manager



"The speed that I can get something accomplished on the tablet amazes me. It **cuts 30% off the time** it takes me to organize my laptop sitting on an airplane to pump out some quick emails." – Retail President/CEO/COO



"We travel frequently to client sites. Smartphones allow us to be in constant contact, and **collaborate effectively even when in remote locations.**" – Professional Services Manager



"We are a catering company and our **delivery system wouldn't work** a fraction as well without smartphones." – Food Services Owner/Partner



"We now manage all orders on a shared calendar, which is easily accessible by smartphone. All employees now have **instant access to our production and shipping schedule**, which is invaluable in the field." – Manufacturing VP/Assistant VP/Principal

# USERS DRIVE MOBILE APP USAGE

- Small business IT works to catch up with mobile users



**55%** of smartphone and tablet users use work-related mobile apps\*

*What types of apps have you found useful for work related purposes?\**

Email apps (**80%**)



Calendar apps (**76%**)



GPS/navigation apps (**69%**)



Document reading apps (**56%**)



Social media apps (**45%**)



File storage apps (**40%**)



*Businesses are working to keep up with their mobile users. Just...\*\*\**

**27%** offer recommendations for apps

**20%** offer purchased/proprietary apps

**16%** offer custom, internally developed apps

\*According to smartphone and tablet users, n=313 \*\*According to smartphone and tablet users, n=313; respondents asked to select all that apply \*\*\*According to IT managers whose employees use smartphones or tablets; respondents asked to select all that apply

# USERS ARE MOBILE FOR MULTIPLE HOURS DAILY



- The majority of small business IT managers have deployed mobile devices to some of their workforce

## IT managers, have you...

...formally deployed smartphones to any of your workforce?

**79%**  
say yes



...formally deployed tablets to any of your workforce?

**55%**  
say yes



## Mobile device users...



**65%** report that they use laptops for work

Daily, mobile device users spend an average of **4.1 hours** on their laptops\*

**81%** report that they use smartphones for work

Daily, mobile device users spend an average of **2 hours** on their smartphones\*

**25%** report that they use tablets for work

Daily, mobile device users spend an average of **1.7 hours** on their tablets\*



Food services mobile device users spend an average of **2.2 hours** on their tablet\*

\*Of those that use the device for work



# IT: TABLET USE WILL EXPAND SIGNIFICANTLY



- IT managers expect their employees' use of tablets to more than double in the next two years

## Apparently, small is beautiful...

*IT managers: in the next two years, how much will **employee use** of the following devices increase?\**



## Move over desktops and laptops...

**36%** of IT managers say some employees have replaced their work computer (either laptop or desktop) with a smartphone or tablet. An additional **20%** expect that some employees will do so in the next two years.\*\*



**41%** of **construction** IT managers say that at least some of their employees have replaced their work computer (either laptop or desktop) with a smartphone or tablet.\*\*



**50%** of **food services** IT managers say that at least some of their employees have replaced their work computer (either laptop or desktop) with a smartphone or tablet.\*\*

\*IT managers asked what percentage of their employees use mobile devices now, and what percentage they expect to use mobile devices in two years \*\*Of IT managers whose employees use smartphones or tablets for work

# SMARTPHONES PROVIDE THE MOST VALUE

- Smartphones have provided both users and companies the biggest benefit so far **among mobile devices**, but tablets are catching on

Which of the following mobile devices do you find to be most **helpful in your everyday work tasks**?\*



**49%** say smartphones



**46%** say laptops



**5%** say tablets



**18%** of tablet users say tablets are the most helpful

Which of the following mobile devices has made the greatest **change in the way your company does business**?\*



**60%** say smartphones



**31%** say laptops



**9%** say tablets



**30%** of tablet users say that tablets have made the greatest change

*Read about the challenges small businesses face with mobile devices on slide 13*

\*According to mobile device users

# OPPORTUNITY: CUSTOMER CONNECTIONS

- Most small businesses aren't yet using mobile offerings to communicate with their customers...

**63%** of IT managers believe that their company is taking full advantage of what mobile devices have to offer, but:\*\*



**28%**

offer websites optimized for mobile use\*



**23%**

offer text message marketing\*



**17%**

offer mobile coupons\*



**14%**

offer custom mobile apps\*



**32%** of retail IT managers say their company offers text message marketing\*

## There is an opportunity to do better:

Mobile device users list providing better customer service as a top mobility benefit, yet most small businesses surveyed are not yet offering their customers mobile-friendly service features

\*According to IT managers; respondents asked to select all that apply \*\*According to IT managers; percent that somewhat or strongly agree

# BYOD IS COMMONPLACE, NOT JUST A TREND



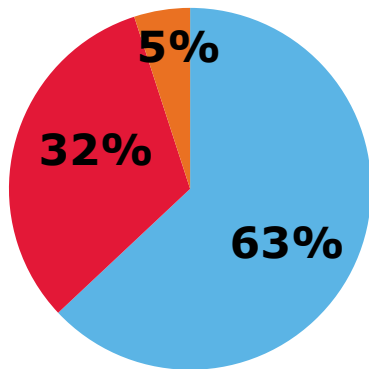
- IT managers say **89%** of small business employees use their own personal mobile device for work\*

*Mobile device users: who **owns** the mobile device you use for work?\**\*\*

-  I do
-  My company does
-  I use **both** a personal device and a company-owned device



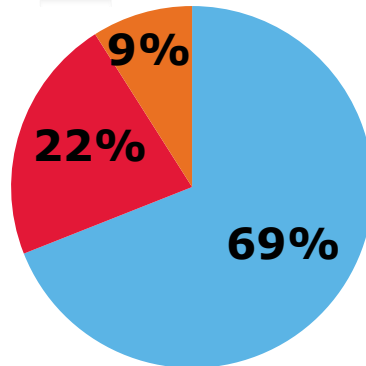
## Smartphone



**51%** of **construction** mobile device users use their company's smartphones



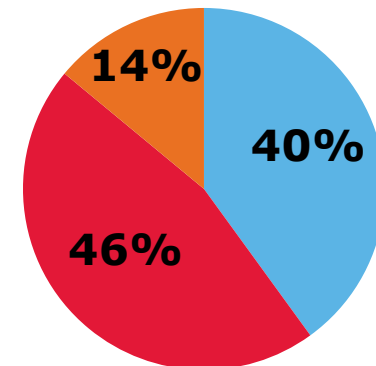
## Tablet



**77%** of **manufacturing** mobile device users use their own tablets



## Laptop



\*According to IT managers \*\*Of those that use the device for work. Smartphones n=318; Tablets n=124; Laptops n=279

# MANAGING MOBILE DEVICES TOPS CHALLENGES



- While small businesses see big benefits from mobility, they struggle to manage and secure mobile devices

Just **51%** of IT managers agree that their company has an **effective IT strategy** to manage their employees' mobile device use.\*

## IT management challenges:\*\*

- 42%** Manage mobile devices
- 40%** Secure mobile devices
- 19%** Control increased need for storage
- 18%** Control increased need for servers

## Mobile device user challenges:\*\*\*

- 31%** Manage employees' work/life balance
- 31%** Manage employees' work style
- 30%** Manage mobile devices
- 29%** Secure mobile devices

\*Percent that somewhat agree or strongly agree \*\*According to IT managers; respondents asked to select all that apply \*\*\*According to mobile device users; respondents asked to select all that apply

# MDM COULD BE THE SOLUTION

- While few IT managers report using mobile device management (MDM) – those who do say it gives them a better grip on mobile devices and applications

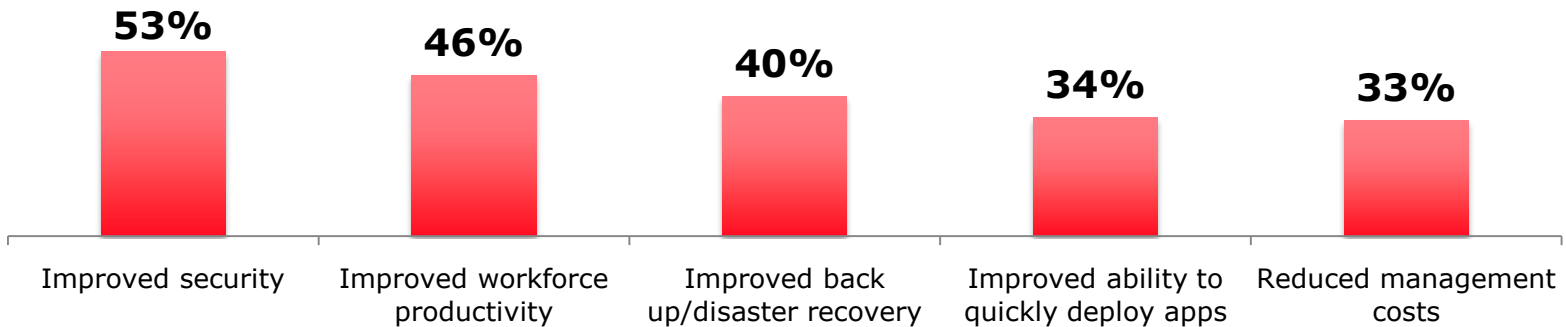
IT managers: are you familiar with MDM?

**33% Yes\***      **67% No\*\***

**22%** have deployed an MDM solution, are currently deploying or plan to deploy

**57%** of MDM solutions will include personal and company-owned devices\*\*\*

Benefits realized from MDM:\*\*\*\*



We define MDM as a software application that includes policy and security management capabilities across many different operating systems or platforms. An MDM solution should offer the following standard functionalities: application management (deploy, update and wipe); policy (develop and control the operational aspects of the mobile network); inventory (licenses, version control, provision and support); and security management (enforce password settings, encryption and remote lock and wipe).

\*Percent that are very or somewhat familiar \*\*Percent that are not very or not at all familiar \*\*\*Of those that have deployed or plan to deploy an MDM solution, n=83 \*\*\*\*Of those that have deployed or plan to deploy an MDM solution, n=83; respondents asked to select all that apply

# LOOKING AHEAD: WHAT MOBILE USERS WANT



How would you like to use a mobile device (or a hypothetical mobile app) that would help you **do your job better** or more easily?



"I would love to be able to use a **tablet to take notes when working a trade show** and/or during a meeting, then be able to easily publish these notes on our intranet." – Retail VP/Assistant VP/Principal



"An order tracking app would be a big benefit to our customers, allowing them to **track deliveries in real time.**" – Food Services VP/Assistant VP/Principal



"I would like more interface with clients' operational programs (specialized machinery). It would allow me to **make programming changes remotely,** saving much time and travel." – Manufacturing Manager



"It would be great to have **an app which manages all my marketing outlets** including social media channels and all digital and physical publications." – Food Services Manager



"We need to have a portable printing device that is small, so **orders can be printed in the field for immediate signature.** Or we need a responsive screen that accepts signatures." – Construction President/CEO/COO



"An email app that could somehow **identify which email is most important and push it to me** for instant reply any time would be great." – Professional Services Manager



"Maybe if there was a way to **keep track of who is on which crew which days...** or if there was a way for the employees to report/request their time off." – Construction Manager

# RECOMMENDATIONS

- **Secure personal mobile devices:** 89 percent of small business employees use their own devices for work. Protect your network and data accordingly
- **Add MDM:** An MDM solution can simplify policy, security and other facets of management. Speak to a trusted solutions provider to find out which solution best fits your company's needs
- **Consider MAM:** Mobile application management solutions (MAM) encourage consistent use of apps across an organization, simplify collaboration, protect the company's data and reduce employee resistance to MDM in a BYOD setting
- **Comprehensive Mobility Management Services:** Some providers offer cost effective management of devices and apps, from inventory control, carrier management, provisioning and help desk to lifecycle management
- **Involve your customers:** Mobility can be great for customers, too. Consider offering them mobile apps and optimizing your website for mobile platforms





# METHODOLOGY



- CDW surveyed\* small business mobile users and IT professionals across five industries in July, August and September 2012. The total sample size equates to a margin of error of  $\pm 3.5\%$  at a 95% confidence level; individual industry samples equate to a margin of error of  $\pm 8.0\%$  at a 95% confidence level; end user and IT management samples equate to a margin of error of  $\pm 5.0\%$  at a 95% confidence level
- Data collection methodology: National online survey
- Total sample size: 752
  - Construction: 151
  - Manufacturing: 150
  - Retail: 150
  - Food services: 150
  - Professional services: 151
- Respondent demographics:

IT Management Responsibility Titles**	
11%	CIO/CTO
10%	IT Director or Supervisor
16%	IT Manager
13%	IT Professional
50%	Non-IT Professional

End User Titles***	
14%	Owner or Partner in a business
5%	President, CEO or COO
6%	CFO, Controller or Treasurer
2%	EVP or SVP
7%	VP, Assistant VP or Principal
12%	Director
54%	Manager

\*Research conducted by O’Keeffe & Company \*\*100% of IT respondents have IT management responsibilities \*\*\*100% of end users use a mobile device (smartphone, tablet or laptop) for work tasks

# APPENDIX



Construction at a glance	19
Food Services at a glance	20
Manufacturing at a glance	21
Professional Services at a glance	22
Retail at a glance	23

# CONSTRUCTION AT A GLANCE



**85%** agree mobile device use is critical to their job.\*

## Devices used for work:



**89%** Smartphones\*\*  
Spending 2.3 hours daily\*\*\*



**55%** Laptops\*\*  
Spending 3.9 hours daily\*\*\*



**20%** Tablets\*\*  
Spending 1.9 hours daily\*\*\*

## Apps enable their customers to\*\*\*\*

- Access information about products and/or services we sell: 75%
- Manage conversation with the company: 50%
- Automate processes, such as obtaining a quote: 50%
- Order a product: 38%
- Allow customers to execute a service that used to be more complex: 25%

## Construction mobile device users see the following benefits:\*\*

Improved communication between field/office personnel: **83%**

Increased employees' productivity: **69%**

Increased availability to customers: **60%**

## What they can do now that they couldn't do before:

*"Order necessary product immediately rather than waiting until the next day for paperwork to be turned in."*  
– Construction Manager

*"Track the location of employees and be more accessible to our customers."* – Construction Manager

*"Have immediate access to updated customer files in the field/in a meeting with the customer."* – Construction President/CEO/COO

\*Percent that strongly or somewhat agree \*\*Respondents asked to select all that apply \*\*\*Of those that use the device for work \*\*\*\*According to IT managers, of those that offer custom apps, n=8

# FOOD SERVICES AT A GLANCE



**69%** agree mobile device use is critical to their job.\*

## Devices used for work:



**81%** Smartphones\*\*  
Spending 2.2 hours daily\*\*\*



**60%** Laptops\*\*  
Spending 3.5 hours daily\*\*\*



**24%** Tablets\*\*  
Spending 2.2 hours daily\*\*\*

## Replacing work computers with mobile devices:

**50%** of food services IT managers say that at least some of their employees have replaced their work computers (either laptop or desktop) with a smartphone or tablet.\*\*\*\*

**24%** of food services IT managers say they plan to have at least some of their employees replace their work computers (either laptop or desktop) with a smartphone or tablet in the next two years.\*\*\*\*

## Food services mobile device users see the following benefits:\*\*

Provided better customer service: **55%**

Increased availability to customers: **53%**

Increased employee productivity: **53%**

## What they can do now that they couldn't do before:

*"If there is a discrepancy regarding payment and I am not at the office, I can use my smartphone to pull up records. I do not have to rush to the office or wait until the next day to remedy the problem."* – Food Services Manager

*"Enter orders remotely and look up pricing options."* – Food Services CFO/Controller/Treasurer

*"Alert customers of new events at a moment's notice."* – Food Services Manager

\*Percent who strongly or somewhat agree\*\*Respondents asked to select all that apply \*\*\*Of those that use the device for work \*\*\*\*Of IT managers whose employees use smartphones or tablets for work

# MANUFACTURING AT A GLANCE



**76%** agree mobile device use is critical to their job.\*

## Devices used for work:



**76%** Smartphones\*\*  
Spending 1.2 hours daily\*\*\*



**65%** Laptops\*\*  
Spending 4.2 hours daily\*\*\*



**28%** Tablets\*\*  
Spending 1.6 hours daily\*\*\*

## New challenges with mobile devices:\*\*\*\*

- No new challenges: 28%
- Managing mobile devices: 27%
- Managing employees' work/life balance: 27%
- Securing mobile devices: 25%
- Managing employees' work style: 24%

## Manufacturing mobile device users see the following benefits:\*\*

Increased availability to customers: **65%**

Improved communication between field/office personnel: **60%**

Provided better customer service: **49%**

## What they can do now that they couldn't do before:

*"Respond to customer inquiries, quotation generation, order fulfillment."* – Manufacturing Manager

*"The ability to showcase our product efficiently and carry around many large files on one small device."* – Manufacturing Director

*"Allows us to be more mobile and travel from client to client without missing a beat at work."* – Manufacturing Director

*"It is much easier to plan production and manage time for each production task."* – Manufacturing Manager

\*Percent who strongly or somewhat agree \*\*Respondents asked to select all that apply \*\*\*Of those that use the device for work \*\*\*\*According to mobile device users; respondents asked to select all that apply

# PROFESSIONAL SERVICES AT A GLANCE



**82%** agree mobile device use is critical to their job.\*

## Devices used for work:



**83%** Smartphones\*\*  
Spending 1.7 hours daily\*\*\*



**77%** Laptops\*\*  
Spending 5.4 hours daily\*\*\*



**29%** Tablets\*\*  
Spending 1.2 hours daily\*\*\*

## Apps enable their customers to:\*\*\*\*

- Manage conversation with the company: 64%
- Access information about products and/or services we sell: 57%
- Allow customers to execute a service that used to be more complex: 43%
- Automate processes, such as obtaining a quote: 29%
- Order a product: 21%

## Professional services mobile device users see the following benefits:\*\*

Increased availability to customers: **64%**

Increased employee productivity: **59%**

Increased collaboration between employees: **59%**

## What they can do now that they couldn't do before:

*"Ability to view documents anywhere, anytime." – Professional Services CFO/Controller/Treasurer*

*"A lot of our work is done in the field, and the smartphone allows us to remain in contact with project documentation even when we are not at our desks." – Professional Services Manager*

*"Get 'in and out' quickly versus elaborate meeting prep." – Professional Services Director*

\*Percent who somewhat or strongly agree \*Respondents asked to select all that apply \*\*Of those that use the device for work \*\*\*According to IT managers, of those that offer custom apps, n=14

# RETAIL AT A GLANCE



**60%** agree mobile device use is critical to their job.\*

## Devices used for work:



**77%** Smartphones\*\*  
Spending 1.5 hours daily\*\*\*



**68%** Laptops\*\*  
Spending 3.7 hours daily\*\*\*



**24%** Tablets\*\*  
Spending 1.6 hours daily\*\*\*

## Customer offerings:\*\*\*\*

- Website optimized for mobile use: 36%
- Text message marketing: 32%
- Mobile coupons: 28%
- Custom mobile apps: 16%

## Apps enable their customers to:\*\*\*\*\*

- Order a product: 67%
- Access information about products and/or services we sell: 50%

## Retail mobile device users see the following benefits:\*\*

Provided better customer service: **56%**

Increased availability to customers: **56%**

Improved communication between field/office personnel: **55%**

## What they can do now that they couldn't do before:

*"Open the lines of communication between people at all locations and levels of the organization."*

– Retail Manager

*"Use Internet while out comparing prices."*

– Retail Manager

*"When there are computer/cash register problems and I am not on site, I can log on and either fix the problem or more quickly assess the situation." – Retail Owner/Partner*

\*Respondents asked to select all that apply \*\*Of those that use the device for work \*\*\*According to IT managers \*\*\*\*According to IT managers, of those that offer custom apps, n=12



**THANK YOU.**

***FOR ALL MEDIA QUESTIONS AND INQUIRIES, PLEASE CONTACT:***

***KELLY CARAHER  
CDW PUBLIC RELATIONS  
847-968-0729  
[KELLYC@CDW.COM](mailto:KELLYC@CDW.COM)***

***MARTY NOTT  
O'KEEFE & COMPANY  
585-271-1141  
[MNOTT@OKCO.COM](mailto:MNOTT@OKCO.COM)***