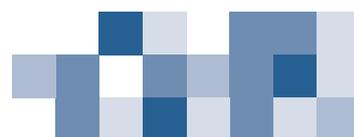


A DEFINING YEAR:

THE STATE OF MOBILITY

2021 REPORT

UNDERSTANDING THE IMPACT OF ENTERPRISE MOBILITY &
HOW ORGANIZATIONS CAN POSITION THEMSELVES AT THE
FOREFRONT OF THE POST-PANDEMIC MOBILE REVOLUTION



Arlington
Research

DO ENTERPRISES HAVE THE MOBILE TECHNOLOGY THEY NEED TO SUCCEED?



Throughout the world, mobile and Internet connected technologies are increasingly integral to the way we live and the way we do business. For enterprises, this raises both a challenge and an opportunity.

The challenge is to meet these changing customer expectations, adapt to an increasingly volatile socio-economic climate, and prepare for the future with the right technologies and the right customer experience. The opportunity goes to the early movers, the ones who see mobility as an enabler, rather than a hindrance.

It's not easy. Potential pitfalls lay in wait at every business-critical decision. But the rewards are significant. According to one recent study, firms that provide staff with mobile-enabled sales tools see an average of 77% growth in sales, and retailers who offer customers mobile point of sale (mPOS) devices increase sales by 92%.¹ With the right strategy and the right mix of technologies, customer facing and behind the scenes, investment in mobile technologies gives companies a competitive edge.

That's why SOTI, a specialist in mobile solutions for the enterprise, conducted its State of Mobility 2021 research. This included interviews and questionnaires with 1,400 business leaders from enterprises in eight countries, across three continents, to find out how businesses are using mobile technology in 2021.

The result is a unique insight into how businesses are using mobile technology today, to provide a superior customer experience and to accelerate key business workflows. As well as revealing how businesses are innovating today, it also uncovers what mobile investments they plan for the future and how they intend to use mobile technology to ready their operations for any future crises.

We hope you find this report useful and insightful.

Shash Anand, Vice President of Product Strategy at SOTI

1. <https://insights.samsung.com/2019/10/25/in-store-mobility-delivers-roi-by-improving-associate-performance>

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METHODOLOGY AND SAMPLE

1,400 interviews were conducted using an online methodology by Arlington Research, with IT decision-makers (C-Suite, Senior Management, Directors and Managers) working in any vertical in companies with 50 or more global employees across eight countries. All respondents were aged 18 and over between July 22, 2021 and August 4, 2021.

The 1,400 interviews were split across eight markets as follows: USA (300 respondents), Canada (130 respondents), Mexico (150 respondents), UK (300 respondents), Germany (170 respondents), Sweden (100 respondents), France (150 respondents) and Australia (100 respondents).

KEY FINDINGS

79%

79% agree their organization's C-Suite realize the importance of mobile technology much more now than before the start of the COVID-19 pandemic.

67%

67% said the mobile technology their organization had invested in had provided a positive return on investment (ROI).

64%

64% had changed the way staff were trained or contracted to work with mobile technology.

57%

57% of enterprises have invested in mobile technology or mobile security in the last year.



THE STATE OF MOBILITY IN 2021

The pandemic had persuaded enterprises to invest even more heavily in mobile technology than they had in 2020 and this trend looks like it will continue. **The GSMA predicts that mobile operators will invest \$900 billion USD globally between 2020 and 2025 to upgrade their services to meet ballooning demand for mobile connections and technology.**²

The question for enterprises is how to get the best possible returns from the money they're putting into mobile technology. With high levels of investment across many sectors, simply adopting new technologies isn't enough on its own. To maximize their returns and gain the greatest competitive edge, enterprises need the right mix of mobile technologies and the right integration strategy.

The SOTI State of Mobility report paints a mixed picture, validating the impression that businesses are massively investing in mobile technology, but also revealing possible gaps in that investment.

Clearly, a significant number of enterprises are investing in mobile technology and in their staff's capabilities to use that technology. But first impressions don't tell the whole story. It has not all been smooth sailing.

When asked about the quality of mobile technology integration in their operations, **76% believe there is more their organization can do to improve their ability to be agile and adapt to new scenarios.** A further **56%** said that their organization's portfolio of mobile devices has grown, but they find it hard to manage. Meanwhile, **45%** of respondents said that their organization is not using mobile technology to help it adjust to the challenges of the post-pandemic marketplace. Also, just **44%** of respondents said the technology was completely integrated. The remainder said it was partially integrated, or not integrated at all.

2. <https://www.gsma.com/mobileeconomy>



“WHAT WE’VE SEEN OVER THE LAST TWO YEARS HAS BEEN A MASSIVE INVESTMENT IN MOBILE TECHNOLOGY AND EVALUATING SOLUTIONS THAT ENABLE MOBILE INTEGRATED SYSTEMS,” SAID SHASH ANAND, VP OF PRODUCT STRATEGY AT SOTI. “BUT WHAT THESE FINDINGS INDICATE IS THAT THERE ARE STILL SIGNIFICANT EFFICIENCY AND COST SAVINGS TO BE MADE BY BETTER INTEGRATING THESE TECHNOLOGIES INTO EXISTING AND NEWLY DESIGNED WORKFLOWS, ESTABLISHED AND EMERGING EMPLOYEE PRACTICES AND THE OVERALL CUSTOMER EXPERIENCE.”

SHASH ANAND

VP OF PRODUCT STRATEGY AT SOTI





MOBILE TECHNOLOGY INVESTMENT IN 2021: SEIZING OPPORTUNITY OR JUST SURVIVING?

The pandemic presented a huge challenge to many businesses. A Deloitte survey³ in June 2020 found that in the face of COVID-19, 90% of employers saw providing their workers with a remote and flexible working arrangement as urgent. Overnight, mobile technology became vital in enabling business continuity and human contact – but virtually and socially distanced.

The result was a massive investment in mobile technologies and platforms. The new mobile revolution had begun. But did these organizations invest for the long term, or just enough to get them through the crisis? Have businesses continued to enjoy healthy returns on these investments in the long term – even those who have used mobile technology to successfully weather the storm?

Among other things, the report found that:

- **31%⁴ didn't think the last year's investment in mobile technology had provided a positive ROI. Only 38% strongly agreed that their company was planning for the next emergency.**

This clearly indicates that, for some companies, the investments they made over the last year have been focused narrowly on the specific challenges of 2020's lockdown and government mandated social distancing.

The challenge for these companies is to integrate mobile technology more fully into their core workflows. This will enable them to capitalize on the potential of their technology to provide flexibility and intelligence across the whole enterprise.

The scope for them to do this, and to achieve their goals by capitalizing on their investment in mobile tech, is revealed in the answers they gave about their aspirations and goals for the near future:

- **68% agree that their company needs better business intelligence (BI) to navigate future unforeseen issues.**
- **67% think they need better tools to diagnose issues before they become a problem.**
- **43% would like to improve their ability to monitor data analytics.**

Each of these ambitions can be achieved today with the right devices, the right mobile technology platform and the right strategy. In many cases, the respondents who gave these answers could use their existing mobile devices and systems, in tandem with task specific solutions, to achieve these goals.

Finally, **over 45% say that their organization is not properly leveraging mobile technology to help it adjust to the challenges of the post-pandemic marketplace.** “It's clear that many businesses know there is still a great deal of potential locked up in their mobile technology,” said Shash Anand. “They just require access to the expertise and technology needed to unlock that potential.”

3. <https://www2.deloitte.com/global/en/pages/risk/cyber-strategic-risk/articles/covid-19-managing-supply-chain-risk-and-disruption.html>

4. 22% of respondents said mobile technology had provided a neutral ROI. 8% said it had provided a negative ROI, but they expect to see a positive ROI in future years, with 1% saying it had provided a negative ROI and the future ROI is uncertain. These have been combined to create the 31% stat in the report.



PLANNING FOR A POST-PANDEMIC MARKETPLACE

The pandemic, lockdown and subsequent changes in consumer behavior have accelerated the digital transformation of businesses by up to six years.⁵

Organizations are faced with the prospect of a post-pandemic marketplace that is more fluid, more digital, more dynamic and marked by a rise in consumer demands. One recent study found that 63% of consumers now say that great customer service is why they choose a brand and 45% say that after just two bad experiences they'll never shop with a brand again.⁶

To thrive in this hyperconnected, accelerated and increasingly demanding marketplace, enterprises must become more intelligent and more agile. Mobile technology plays a key part in this.

Companies can use mobile technology to gain a competitive edge in the post-pandemic market by:

- **Guaranteeing uptime with mobile intelligence:** As businesses become more reliant on mobile technology, a data-based understanding of mobile assets is vital.
- **Deploying advanced troubleshooting:** Technicians should be given the specific tools they need to remotely solve complex problems.
- **Applying network-wide mobile management:** By building resilience and flexible, policy-defined configurations to all devices and implementing them network-wide.

5. <https://www.cnn.com/2020/12/22/coronavirus-sped-up-digital-transformation-by-6-years-twilio-ceo-says.html>

6. <https://www.gladly.com/reports/2021-customer-expectations-report>



WHAT DO ENTERPRISE LEADERS SAY THEIR COMPANIES NEED POST-PANDEMIC?

69%

BETTER DATA ANALYTICS, TROUBLESHOOTING & ISSUE RESOLUTION.

68%

BETTER BUSINESS INTELLIGENCE TO HELP NAVIGATE FUTURE UNFORESEEN ISSUES.

67%

BETTER TOOLS TO DIAGNOSE ISSUES BEFORE THEY BECOME A PROBLEM.

67%

BETTER SECURITY & USER AUTHENTICATION ACROSS ALL MOBILE DEVICES.

56%

BETTER WAYS TO MANAGE THEIR EXPANDED PORTFOLIO OF MOBILE DEVICES.



Thanks to distributed and hybrid working, as well as the rise of mobile commerce, mobile technology is more critical now in the emerging post-pandemic era than it has ever been. This has led to a greater need to integrate and manage multiple form factors, operating systems, legacy operating systems and latest versions of technology. There is no doubt this mobility revolution is causing businesses to rapidly scale across all areas. This in turn puts pressure on companies to adapt and rollout changes in technology at an ever increasing pace.

To ensure maximum uptime and productivity, as well as the best user experience, enterprises need to be able to see data on things such as battery usage (and life expectancy), app usage, network coverage and more, and in real-time.

With this information, they can spot issues before they become problems. They can also optimize employees user experience by moving them to a network with better coverage in the locations where they most often use their business devices.

SOTI's research indicates that these issues are top of mind for forward thinking executives. It shows that 80% say employees are more engaged when they have the right technology, while almost 70% say their organization needs better tools to diagnose mobile problems. 45% of business leaders say they're worried their enterprise hasn't adapted to the post-pandemic market (10% higher than those that say their enterprise is prepared). Fortunately, these are the decision-makers who, if agile enough, can make the changes needed and integrate the right tools to lead their company through this mobile revolution.



THE PRINTER AS A PREDICTOR

To get an idea of the challenges of managing IoT devices on the future network, we can look at the challenges of managing printers today. Stationary and mobile printers are, in effect, unattended, networked computers.

Their operating systems are flexible enough to allow intruders to customize them for a range of unintended and unauthorized activities. Often, because they aren't assigned to a specific user, there is a danger that they may be missed when patches or updates are pushed out.

Fortunately, there are systems on the market that can automate printer administration, greatly simplify remote troubleshooting and configure Wi-Fi Certificates to manage the security of each device. Often the same applications and solutions are used to manage mobile devices and these same solutions, and skills, will also apply to IoT devices as they come online.



LOOKING TO THE FUTURE

By 2030, there will be 25 billion Internet of Things (IoT) devices worldwide, up from 9 billion today.⁷ In the business space, these IoT devices can include anything from sensors on key machines and components in factories, through to intelligent signage in retail devices, right up to connected, intelligent wearables which allow others to see and interact with what the wearer is seeing.

Many of these devices will be connected to mobile networks, particularly 5G networks, and will run mobile operating systems. Managing them will require the same skills, technologies and systems that companies invest in to manage their mobile devices today. Investing in intelligent, whole portfolio device management is an investment for the future of the extended and diversified network.

In the immediate future, the recent pace of change looks set to continue. Over the next 12 months, 71% of organizations are considering increasing their expenditure in mobile technology devices, systems, and/or security, and 56% on technology for better device and system integration and/or replacing legacy systems.

7. <https://www.statista.com/statistics/1183457/iot-connected-devices-worldwide>



NEXT STEPS

In an industry defining year, companies have invested significantly in mobile technologies and platforms. The impact has been clear for all to see. This investment has accelerated the pace of business, enabled firms to adapt to the challenges of the pandemic and helped customers access the goods and services they need, despite the disruption every organization has faced.

Now is the time to go a step further. With the right technologies and expertise, companies can build on their investment in mobile technologies to expand capabilities in areas such as data and predictive analytics, business intelligence, customer experience and more.

Even more exciting, they can integrate these functions with each other and with their core systems to create a business-wide technology ecosystem that's flexible, scalable and intelligent. Doing this gives them the edge they need today, making it easier to respond in real-time to the market's changing demands. It also gives them the agility they need to respond to future crises.

SOTI is a world leader in mobile technology for business. Our experts can work with you to help your company get the maximum return on investment in mobile technology. Together, we can help you take your company through the next phase of the mobile revolution.

ABOUT SOTI

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

Our two decades of success have 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 has a clear vision, laser focus and a commitment to R&D that has made us the market leader at delivering exciting, new business mobility solutions. SOTI helps businesses take mobility to endless possibilities.



HOW SOTI CAN HELP ENTERPRISES

SOTI uses its expertise, technology and data capabilities to help leading enterprises around the world achieve better conversion rates, better customer outcomes and higher revenues. Ways in which SOTI can help you include:

- **Integration:** Secure and manage all mobile and IoT devices and operating systems (OS) – even when you’re working with employees’ own devices as part of your BYOD strategy.
- **Security:** Lockdown your managed devices anytime, anywhere, to maintain security, compliance and protect sensitive data.
- **Personalization:** SOTI works with you to develop and implement an end-to-end management solution to meet all your business-critical mobile requirements.
- **Ease of deployment:** Use SOTI MobiControl’s rich enrollment capabilities to rapidly deploy devices, content and apps.
- **Asset tracking:** Your workers are constantly on the move, and so are their mobile devices. Visibility into where these assets are, and what they are doing, can improve your operations.

TO LEARN MORE:

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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