Sage SMB Survey on Mobile Devices: Manufacturing and Distribution Industries

March 2013

Summary Report

Introduction

The following is an analysis of small and midsized businesses in the manufacturing and distribution industries commissioned by Sage, a leading global supplier of business management software and services for small and midsized businesses. This is part of a larger online survey of decision makers and employees of various industries about their use of mobile devices conducted between January 10 and February 1, 2013. Among the findings for this industry:

Almost nine out of ten companies allow employees to use laptops for remote access to work-related information (86%). Smartphones are the second most common device used (81%) as reported by decision makers, while computer desktops and tablets are less likely to be used remotely to access company work-related information (71% and 62% respectively). Almost seven out of ten companies (68%) surveyed supply mobile devices to their employees, while about three out of ten (28%) will allow employees to use their own devices (with no company reimbursement. In slightly less than one out five cases (18%) will the company allow the employees to bring their own devices but the company pays the service fee. Decision makers feel that smartphones (78%) and tablets (63%) have especially increased in their use for remote access to business information over the past year, followed by laptops (41%) and computer desktops (16%).

Fewer than one in ten responding decision makers use Windows® 8 on their laptops or computer desktops (7% and 8% respectively). About 1% indicate that the company uses it for tablets or smartphones. Decision makers indicate that their company smartphone and tablets are more likely to use Apple iOs (58%), followed by Android (40%) and Windows (38%) systems. Almost nine out of ten (85%) decision makers feel that mobile technology has had a positive effect on their company's productivity. Remote access has made it easier for sales representative to get company information (such as company catalogs) while interfacing with clients, faster credit authorizations, allowing executives to access email and work while traveling, and decreased organizational time for sales reps and clerical staff.

Decision makers report that they use mobile applications most commonly for keeping contacts organized (32%), keeping up task lists and assigning tasks to a specific employee (20%), scheduling (30%), and keeping up with the status of projects (18%). Mobile applications are rarely used for managing the accounting or for creating customer invoices. These are commonly done with desktop software applications (usually accounting software).

When asked whether they personally used mobile devices to access work-related information remotely, slightly more than four out of five (84%) decision makers and other employees indicated that they had. Smartphones and laptops were most commonly used remotely (73% and 72%), followed by tablets (48%) and computer desktops (41%). When asked what proportion of their usage of various devices was work related (versus personal), users cited 72% for laptops, 69% for desktops, 61% for smartphones, and 43% for tablets. Company employees most often access work-related information and applications remotely for: email (93%), managing business contacts (71%), text messaging (62%), scheduling (59%), and online

banking (52%). Activities least likely to be conducted remotely were online meetings (16%), file storage (23%), time management (21%), and accounting/ERP (30%).

Slightly less than half (45%) of the manufacturing and wholesale trade companies who responded had fewer than ten employees, and 40% had between 10 and 49 employees.

What is your primary role at your business?

Answer		Response	%
Owner, President, CEO, Partner, or General Manager		107	43%
Controller, Treasurer or CFO, Accounting Administrator, or Supervisor		41	16%
Accountant/Bookkeeper		27	11%
Office Manager/Administrative Asst./Secretary		19	8%
Operations Manager		5	2%
Information Technology		14	6%
Sales/Marketing		33	13%
Professional		0	0%
Other		3	1%
Total		249	100%

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How many of your employees are using the following to access work-related information when they are not in the office:

Question	None	1 or 2	3 to 5	6 to 10	11 to 25	More than 25	Don't Know/Not Sure	Mean
Laptops	14.2%	40.1%	29.0%	13.0%	2.5%	1.2%	0.0%	2.5
Desktops	28.4%	30.2%	23.5%	13.0%	2.5%	1.9%	0.6%	2.4
Tablets	35.8%	37.7%	17.9%	4.3%	1.2%	0.6%	2.5%	2.1
Smartphones	17.9%	25.9%	27.8%	17.9%	6.8%	3.1%	0.6%	2.8

How useful would it be to use mobile devices for the following tasks?

Question	Very Useful	Somewhat Useful	Neutral	Somewhat Not Useful	Not At all Useful	Mean
Viewing your calendar	10.0%	0.0%	30.0%	10.0%	50.0%	3.9
Keeping up with the status of projects and organizing project details	10.0%	10.0%	30.0%	0.0%	50.0%	3.7
Creating customer invoices	20.0%	0.0%	20.0%	10.0%	50.0%	3.7
Keeping your task list and/or assigning tasks to team members	0.0%	0.0%	40.0%	10.0%	50.0%	4.1
Viewing accounting and business reports	20.0%	20.0%	20.0%	0.0%	40.0%	3.2
Tracking time spent on your work	10.0%	10.0%	30.0%	0.0%	50.0%	3.7
Accepting payments	20.0%	10.0%	10.0%	10.0%	50.0%	3.6
Accessing customer information	30.0%	10.0%	10.0%	0.0%	50.0%	3.3
Processing customer payments by credit card	10.0%	0.0%	20.0%	10.0%	60.0%	4.1

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Are the mobile devices used by your employees supplied by your company? (Check all that apply)

Answer		Response	%
Supplied by company		103	68%
Supplied by employee (no company reimbursement)		42	28%
Device supplied by employee but service paid for by company		27	18%
Don't know/not sure		6	4%

How much do you believe the use of the following devices for remote access has changed over the past year?

Question	Decreased	Remained the same	Increased	Mean
Laptops	8.6%	50.7%	40.8%	2.3
Desktops	23.7%	60.5%	15.8%	1.9
Tablets	3.3%	33.6%	63.2%	2.6
Smartphones	1.3%	20.4%	78.3%	2.8

What is your company's approach to Windows 8?

Question	Use today	Plan to use within the next 6 months	Considering	Rejected	Undecided	Mean
Smartphones	1.3%	2.6%	11.8%	32.9%	51.3%	4.3
Tablets	1.3%	3.3%	14.5%	30.9%	50.0%	4.3
Laptops	6.6%	7.9%	23.0%	19.1%	43.4%	3.8
Computers	7.2%	7.2%	23.7%	18.4%	43.4%	3.8

What is your company's approach to supporting the following operating systems for smartphones and tablets?

Question	Use today	Plan to use within the next 6 months	Considering	Rejected	Undecided	Mean
Android	39.5%	1.3%	5.3%	26.3%	27.6%	3.0
Apple iOs	57.9%	1.3%	3.9%	17.8%	19.1%	2.4
Windows	38.2%	1.3%	11.2%	19.1%	30.3%	3.0

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What effect has mobile technology had on your company's productivity?

Answer		Response	%
Positive		129	85%
Negative		1	1%
No effect		22	14%
Total		152	100%

Please indicate how your business currently carries out each of the business functions below: (Check all that apply)

Question	Paper	Desktop spreadsheet software	Desktop software (other than spreadsheet)	Mobile application	Web-based application	Outside service	Other	Don't do this
Scheduling	15.1%	32.9%	34.2%	19.7%	16.4%	0.7%	3.9%	11.2%
Keeping up with the status of projects and organizing project details	13.2%	28.3%	37.5%	18.4%	14.5%	2.0%	5.3%	13.2%
Creating customer invoices	11.2%	10.5%	77.0%	5.9%	6.6%	0.0%	3.9%	2.0%
Keeping a task list and/or assigning tasks to specific employees	14.5%	23.0%	34.9%	20.4%	11.2%	0.0%	5.3%	19.1%
Managing business' accounting	4.6%	14.5%	81.6%	2.0%	5.9%	0.0%	5.3%	0.0%
Tracking time spent on specific projects	8.6%	17.8%	32.2%	8.6%	5.9%	0.0%	3.3%	41.4%
Keeping all contacts organized	3.3%	16.4%	65.8%	32.2%	13.8%	0.7%	3.3%	1.3%

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Do you personally use a device (such as a desktop, laptop, tablet computer or smartphone) to access work-related information remotely (when away from the office or your main computer)?

Answer		Response	%
Yes		200	84%
No		39	16%
Total		239	100%

What types of devices do you use to access work-related information remotely? (Check as apply)

Answer		Response	%
Desktop		82	41%
Laptop		143	72%
Smartphone		146	73%
Tablet		95	48%
Other (specify)		3	2%

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What is your personal approach to Windows 8?

Question	Use today	Plan to use within the next 6 months	Considering	Rejected	Undecided	Mean
Smartphones	5.5%	1.5%	12.5%	31.5%	49.0%	4.2
Tablets	4.0%	3.5%	13.0%	30.0%	49.5%	4.2
Laptops	12.5%	9.5%	20.0%	16.5%	41.5%	3.7
Computers	12.0%	10.5%	18.5%	15.0%	44.0%	3.7

What is your company's approach to Bring Your Own Devices (BYOD) to work?

Answer		Response	%
We already have this company policy, which lets employees bring and use their devices		91	46%
We are considering this policy to let employees bring and use their devices		16	8%
We have not considered this policy		60	30%
We have considered this policy and decided to **not** permit employees to bring and use them		25	13%
Other		8	4%
Total		200	100%

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For the desktop device that you use, what percentage do you use for work versus personal? (Move the slider to indicate percent.)

Answer	Min. Value	Max. Value	Average Value	Standard Deviation	Responses
DeskTop	2.00	100.00	69.10	30.81	82

For the laptop that you use, what percentage do you use for work versus personal? (Move the slider to indicate percent.)

Answer	Min. Value	Max. Value	Average Value	Standard Deviation	Responses
Laptop	5.00	100.00	71.56	25.35	142

For the smartphone that you use, what percentage do you use for work versus personal? (Move the slider to indicate percent.)

Answer	Min. Value	Max. Value	Average Value	Standard Deviation	Responses
Smartphone	2.00	100.00	61.11	26.55	146

For the tablet that you use, what percentage do you use for work versus personal? (Move the slider to indicate percent.)

Answer	Min. Value	Max. Value	Average Value	Standard Deviation	Responses
Tablet	0.00	100.00	42.59	26.81	95

What type of work-related information or applications do you personally access remotely on a mobile device? (Select all that apply.)

Answer		Response	%
Accounting/ERP		60	30%
Banking		103	52%
Contacts		142	71%
Schedule		118	59%
Documents (Word, Excel)		111	56%
Email		186	93%
Field Service		8	4%
File Storage		46	23%
Online Meetings		32	16%
Operations		22	11%
Sales		61	31%
Marketing		31	16%
Social Media		56	28%
Text Messaging		124	62%
Time Management		41	21%
Other (specify)		6	3%

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How many employees work in your establishment?

Answer		Response	%
None		1	0%
1-4		62	25%
5-9		51	20%
10-19		59	24%
20-49		41	16%
50-99		19	8%
100-249		6	2%
250-499		4	2%
500-999		2	1%
1,000 or more		2	1%
Don't know/not sure		2	1%
Total		249	100%

About the Survey

The Sage SMB Survey on Mobile Devices: Manufacturing and Distribution Industries was conducted among 217 respondents and has an error rate of +/- 6.7 percent with a 95 percent confidence level. This is part of a larger online survey of decision makers and employees of various industries about their use of mobile devices conducted between January 10 and February 1, 2013.