

The mobile multiplier.

Five trends in mobile working to help you fast track effectiveness.



Executive summary.

The mobile multiplier means the more employees have a good experience of working on the go, the more benefits you see. As work on the go becomes the norm in many organisations, office workers can deliver a step-change in their effectiveness if they have better apps, data and security for mobile working.

This is a finding from an independent survey of 1,500 office workers in the UK, France, Germany and Spain conducted in September 2016.



The research revealed five clear trends in the needs of office workers:

1. The 'shoulder bag' worker: mobile working is becoming more important to employees than a company car.

One in two office workers say they have most of what they need to do their job in a bag they take with them when on the go. Sixty seven percent say that being given the flexibility and technology to work from the office, at home, in cafés or while travelling is now more important than being offered a company car¹. With today's office workers putting so much value on being able to work on the go, leaders need to think about whether their mobility strategy will attract the best talent.

2. Collaboration on the go: office workers want better tools on their mobile devices for speedier communications and decisions.

Two in three say better communication would really help their organisation succeed¹. They're looking for better ways to share information and data and get hold of colleagues quickly. They also want technology to speed up decision making (54% say they waste time trying to get hold of people, which can delay decisions). The top priorities are clear:

- 69% want screen sharing on their smartphones.
- 62% want IM for work on their smartphones.
- 48% want video chat or conferencing on their smartphones.

Leaders need to explore which advanced collaboration tools their colleagues want (eg, screen sharing, IM or video chat/conferencing).

3. The mobile multiplier: the more employees have a good experience of work on the go, the more benefits you see.

Our research showed that the office workers who find mobile working easier want more from their devices so they can do even more work on the go. Seventy three percent would rather their IT department invest in mobile technology than technology for their office desk (this compares to an average of 60% for all office workers). A good end user experience is vital.

Fifty six percent say they would be [even] more efficient if they could update databases and work processes remotely (compared to an average of 44% for all office workers).

But what makes it easy for some employees and not others? What is it about their devices and situation that means some office workers can work on the go more easily and be more productive?

- Seventy two percent say their leadership trusts them to work effectively when away from the office - much higher than the average (45%).
- They're more likely to rate their mobile network highly.
- They're more likely to use just one app to access all their work documents and files (45% compared to 22%) and they're more likely to have IM on their smartphone (36% vs 20%).

Leaders need to think about what their colleagues want access to on their mobile devices to drive effectiveness and how to deliver the infrastructure needed for a great experience at all times.

4. Security uncertainty: protecting data and devices remains a big concern for employers and employees alike.

Thousands of office workers in large organisations have lost a phone they use for work. In the UK, 11% have lost or had stolen a mobile device they use for work, compared to 6% in France and Germany and 13% in Spain. Many office workers don't know what steps their IT departments have put in place to protect their devices and data in the event of loss or theft. IT decision makers themselves are sometimes unsure of how technology can protect organisational data held on mobile devices.

Leaders need to review security for mobile devices and reduce uncertainty about data safeguards to ensure workers get the most from mobile working.

5. The cost conundrum: office workers feel constrained by concerns about mobile costs.

Around three in four office workers say their employer tries to limit the costs of using smartphones and tablets¹. Thirty seven percent say they only make limited use of mobile devices when overseas because of roaming charges. Twenty percent regularly run out of data. Most employers cover the costs of employees' mobile devices, albeit in different ways. Many don't know if they're on the cheapest mobile network when their employer refunds the charges.

Leaders need to think about how they can monitor and reduce expenditure while improving the mobile working experience.



There were few differences by age and sector.

Compared to a nationally representative consumer survey, our results revealed narrower differences in attitudes and behaviour by age. This is partly because our research shows people aged 18–24 and 55+ are less well represented in big organisations and partly because there's less choice as to what technologies are used. For instance, if IM is used at work, most employees will follow suit. Interestingly, younger office workers were more likely to run out of mobile data and want new apps for work purposes. Middle-aged employees were more interested in flexible working.

Mobile working is most advanced in the professional services and technology sectors. Financial services were most concerned about data security. Mobile working is less common in the retail and public sectors.

1. The 'shoulder bag' worker: mobile working is becoming more important to employees than a company car.

Many employees have all they need to do their work in a bag so they can work anywhere – if they have the right mobility technology.

One in two office workers say they have most of what they need to do their job in a bag, which they can take anywhere. Most now regularly work not just in the office but on the go – in cafés, while travelling, or at home. Just 13% never work away from the office. Sixty seven percent say being able to work on the go or at home and having good technology to enable flexible working is more important than being offered a company car¹.

Today's office workers put flexible working top of a benefits package from the ideal employer, with 76% including it in their top three priorities. Fifty four percent say they consider how good an employer's tech offering is when choosing who to work for, because being able to work on the go matters to them a lot. People are increasingly using smartphones, laptops, tablets and wearables to work flexibly. On average, office workers in large organisations use 3.5 desktops, laptops, tablets and phones to do their work.

One of the IT decision makers we interviewed confirmed this: "Having done a segmentation of employees, we found different wants and needs. The younger generation would compare what our competitors were offering because their mobile experience is so important to them." (International brewer).

67%

Being able to work on the move, at home and flexibly through good technology is more important to me than being offered a company car¹.

76%

Flexible working is the top choice of employees for a benefits package in the ideal employer.

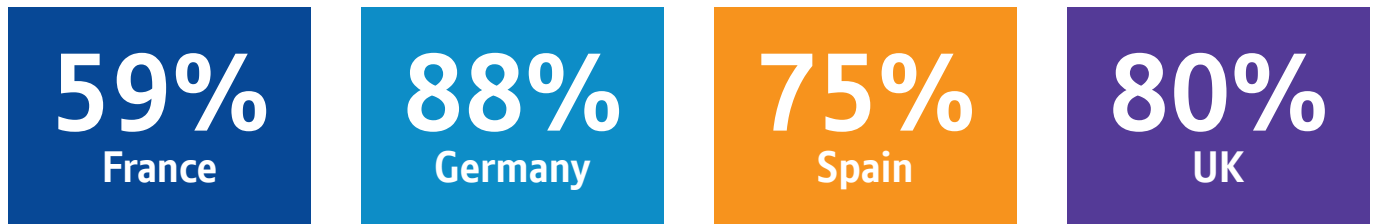
3.5 devices

The average number of desktops, laptops, tablets and phones used by non-manual workers in large enterprises.

50%

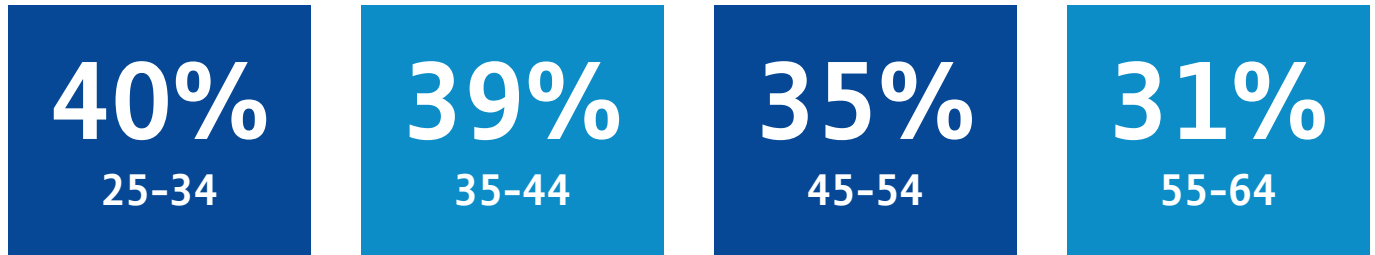
Most of what I need to do my job these days I keep in one bag that always goes with me

Flexible working – ranked in top three of employee benefits.



People of all ages are interested in flexible and mobile working.

Flexible working – ranked first in employee benefits.



IT decision makers believe that more and more work practices will become geared to mobile devices than office desks. One commented: “Smart technologies help with being competitive. As mobile devices evolve, it’s important to our organisation to adopt them. Better communication with each other and our customers makes us more competitive.” (Global industrial).

Office workers confirmed this shift from desks to devices and flexible working: Eighty two percent say that in future, working away from the office will become more important to their colleagues¹. Fifty one percent say they would prefer to use just one smartphone and tablet for work and home life¹. Already, 46% say they use a mobile or smartphone for most work calls¹.



What do leaders need to think about?

The research raises some important questions for employers.

- Does your benefits package offer a good deal on flexible and mobile working?
- Could productivity increase if employees were able to work away from the office more often?
- Is your data security strong enough for outside as well as inside the office?



2. Collaboration on the go: office workers want better tools on their mobile devices for speedier communications and decisions.

Better internal communication and access to data is a top priority, especially when working on the go.

It may come as no surprise that two in three office workers say better communication would really help their organisation succeed¹. Fifty four percent say they often waste time trying to get hold of people, which delays decisions. This is a big incentive for leaders and IT decision makers to make it easier for employees to communicate with colleagues and access data through readily available collaboration tools.

Mobile working has become the norm for two in three office workers, with only one in ten saying they never work away from the office. This has wrought major changes in the way work tasks are carried out. In some sectors especially, office workers rely less and less on the 'water-cooler chat' or just 'popping by your desk', so need to be able to get hold of colleagues easily using mobile devices when not in the office. Office workers are seeing the benefits of these changes: fifty three percent say that because colleagues are using mobile devices more, less time is wasted on long emails and documents.



Of the two in three workers using mobile devices at places other than the office, the top six uses were:

- 80% Email.
- 73% Work research on web.
- 64% Word processing, spreadsheets or presentations.
- 59% Personal interests and contacts.
- 59% Note-taking software.
- 57% Making travel bookings.

My employer makes it easier for us to work away from the office.

40%
France

35%
Germany

40%
Spain

41%
UK

While applications like email and research on the web are clearly important, many office workers want new collaboration tools to help boost their productivity and efficiency. They want these tools so it's easier to work in creative and dynamic teams that today's organisations need to compete globally and deliver work within tight budgets. Office workers were clear about their top priorities:

69% want screen sharing on their smartphones.

62% want IM for work on their smartphones.

48% want video chat or conferencing on their smartphones.

Agreeing would be useful for our team or organisation...

Secure mobile access	74%
Screen sharing	69%
Fixed/mobile phone integration	65%
Wi-Fi phone calls	63%
IM on smartphones	62%
One phone number	59%
Data bundle sharing	50%
Visual voicemail	49%
Video on your smart phone or tablet	48%
Phone to video calls	46%
Telephone expenses management	42%
Location sharing, team and organisation	34%

We found very strong demand for better mobile collaboration tools in some sectors (professional services and technology). Overall, though, IT decision makers understood why their colleagues want better collaboration tools. As one commented: "It is critical for those on the go, working remotely at home, in hotels and across the country. We need to react quickly and we are all given the very latest apps and devices." (Management consultant).

What do leaders need to think about?

The research raises some important questions:

- Could mobile collaboration tools improve communication and decision making?
- How easy is it for your employees to work away from the office?
- What improvements do your employees want on their mobile devices? (screen sharing, IM or video chat/conferencing).



3. The mobile multiplier: the more employees have a good experience of work on the go, the more benefits you see.

Office workers who find mobile working easier want more from their devices so they can do even more work on the go.

Our research showed that the office workers who find mobile working easier want more from their devices so they can do even more work on the go. Better apps, security and data would improve their effectiveness and 73% would rather their IT department invest in mobile technology than technology for their office desk (this compares to an average of 60% for all office workers). Fifty six percent say they would be [even] more efficient if they could update databases and work processes remotely (compared to an average of 44% for all office workers).

The end user experience is vital and 10% of the office workers interviewed say they find it very easy to access documents and files through their mobile devices when travelling for work.

What makes it easy for some employees to work on the go but not others? What is it about their devices and situation that means some office workers can work on the go easily and be more productive? First, of people who find it easy 72% say their leadership trusts them to work effectively when away from the office – much higher than the average (45%).

Of the 10% who find it very easy to access documents when they travel locally.

43% Rate their mobile network 9 or 10 out of 10 (average 29%).

51% Use 2GB data or more a month (average 37%).

72% Our leadership trusts us to work effectively when we are away from the office (average 45%).

45% Have one app they can access all work docs and files (average 22%).

36% Have IM on their smartphone (average 20%).

Second, they're more likely to rate their mobile network highly. Third, they're more likely to use just one app to access all their work documents and files (45% compared to 22%) and to have IM on their smartphone (36% vs 20%). These workers rate their productivity highly.

But those who already have a good experience with mobile working say:

56% I would be [even] more efficient if I could update databases and work processes while in the field rather than at the office (average 44%).

73% I would rather their IT department invested in the best technology for use when I'm on the move and at home than for my desk in the office (average 60%).

Overall, there is a 'mobile multiplier' effect - office workers who find mobile working easier tend to want more from their mobile devices and networks so they can do even more on the go. In particular, this includes accessing business processes and databases.

Office workers are clear about their priorities: security, newer devices, and making it easier to access back-office processes and databases while on the go. This would really boost productivity, avoiding unnecessary trips back to the office.

IT decision makers can see the impact of this mobile multiplier effect and what it means for the future. They were unanimous on the need to invest in mobile technology. One observed: “Managers and administrators will work more from home in the future and those in the field currently will be more well-equipped on their mobile phones.” (Large security company). Another remarked: “Some roles in the future will be more remote, all jobs will go towards using more mobile devices.” (Global airline).

Another commented “When it comes to smartphones, the question my colleagues ask is why can’t I do at work what I can do at home? So we’re working to create a secure environment as we know our people want mobile access to databases, processes and communications.” (Public sector).

If you were the CIO of your organisation, what are the priorities for enabling work away from the office?

Improving security for any mobile devices that are used away from the office

76%

Updating the technology (smartphones, etc.) available for work on the move

75%

Improve the ability to capture information remotely & send it to back office systems

73%

Building Apps to make it easier for colleagues to work securely away from work

71%

Ensuring all new IT systems and developments can be accessed on mobile devices

71%

Minimise the costs our organisation faces in providing mobile devices to colleagues

66%

Increasing the budget available for colleagues to work away from the office

65%

What do leaders need to think about?

- What productivity benefits do you see from employees using the newest mobile technology?
- How much do you invest in office-based as opposed to mobile technologies? Is this the right balance?
- Which back-office processes and databases do your employees need to access to push up productivity?



4. Security uncertainty: protecting data and devices remains a big concern for employers and employees alike.

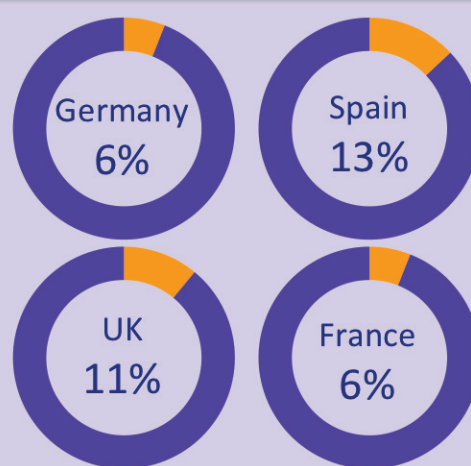
Thousands of employees have lost their work phone or other device, while many don't know if they are protected.

Data security is one of the biggest obstacles to mobile working. The research shows that thousands of office workers in large organisations have lost a phone they used for work. In the UK, 11% say they have lost (or had stolen) a mobile device they used for work, compared to 6% in France and Germany and 13% in Spain. The risks aren't just around losing customer or commercial data, but also the cost of the devices themselves. Staff turnover is another issue – 40% of office workers think employees who store commercially sensitive data on their mobile devices and then leave the organisation are a risk to employers.

Many office workers and even IT decision makers, don't know what security measures they have on their mobile devices. They also don't know the full range of technology available to make mobile working more secure. There is a clear need to upgrade the security for mobile devices in large organisations, given the growing popularity of mobile working. As one IT decision maker said: "We have insurance, employees have to report it if lost and we'll track it, but I'm not aware of other security." (Leading fast food chain). Another commented: "The CEO enforces the right remediating action and that enforces the security culture at our company." (Global airline).

The research confirms this lack of knowledge on something as vital as data security. About one in three office workers said there were ID authentication restrictions for each app they use. A similar proportion said the information they send from their device is encrypted, but most didn't know if this was the case. Many didn't know how secure in-house apps were. Overall, this suggests there is much that IT decision makers could do to improve security on employees' mobile devices, or let them know what security features are available.

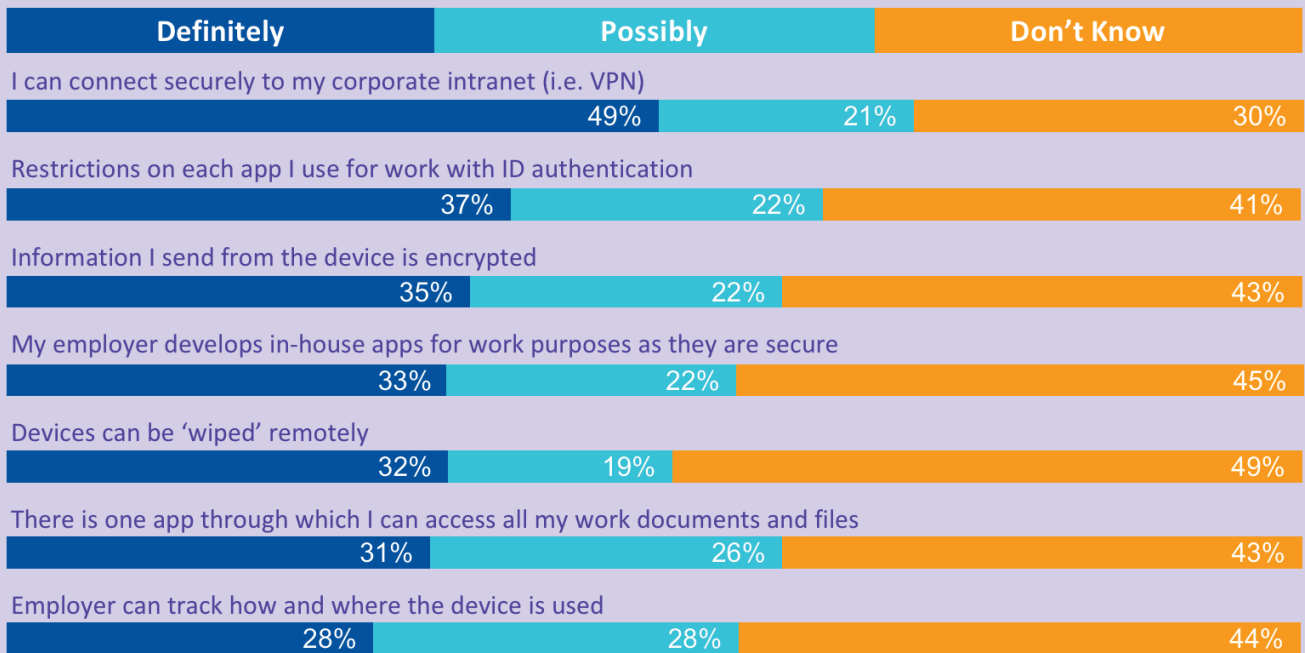
Have you ever lost or had stolen a work mobile device?



40%

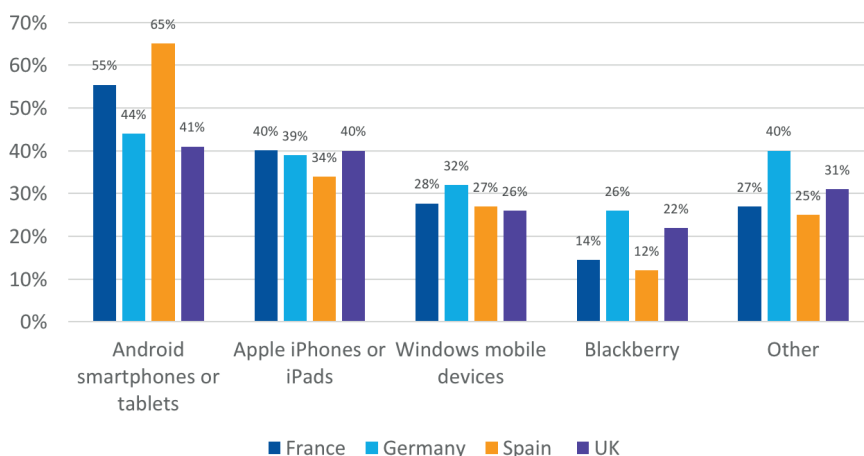
When employees leave our organisation, I suspect they often take valuable data and information with them.³

What security are you aware is in place for your work mobile devices?

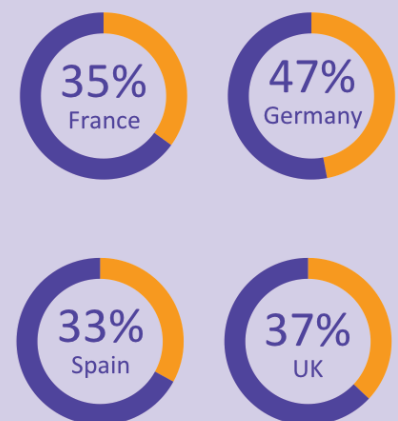


Protection needs to extend to personal devices employees use for work. Despite employers providing 59% of the smartphones used by office workers and 58% of tablets, more than 50% of employees are also allowed to use their personal mobile devices for work purposes. This means IT decision makers need to support a variety of devices.

What devices does your IT department allow you and your colleagues to use for work purposes (regardless of whether you use them or not)?



I'm not allowed to use my personal devices for work.



What do leaders need to think about?

- Do your employees know what security measures you have in place for mobile devices used for work?
- How many of your employees have lost mobile devices that contained organisational data?
- What new apps and security devices would support your mobile working strategy and operations?

5. The cost conundrum: office workers feel constrained by concerns about mobile costs.

Although employers pay around 75% of the costs of mobile devices, office workers don't always get the most from work on the go.

Around three in four office workers in large organisations say their employer tries to cut the costs of using smartphones and tablets for work¹. In most cases, when employees use mobile devices for work, the employer bears the cost, even if the employee holds the contract with the phone company. The organisation then employs a team to review how its employees are using mobile devices, according to our interviews with IT decision makers.

My employer actively tries to reduce the costs of smartphone and tablet usage in our work³.

71%
France

70%
Germany

81%
Spain

71%
UK

This focus on cutting costs could be a false economy though, especially if it prevents office workers being more productive. The research reveals some of their frustrations. Twenty percent of office workers say they often run out of mobile data, while 37% say they don't use their mobile devices much when overseas due to roaming charges. With nearly one in two saying they use a mobile or smartphone to make most of their work calls, these devices are becoming more and more important to office workers.

46%

I tend to use a mobile or smartphone for most of my work calls³.

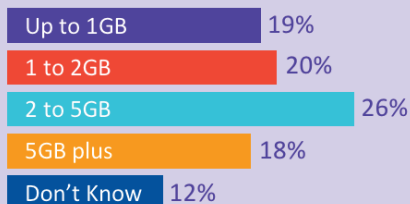
37%

I can only make limited use of my mobile devices when I'm overseas because of roaming charges³.

20%

Say I often run out of mobile data³.

In all, how much mobile data do you estimate you use each month for work (phone & tablet)?³

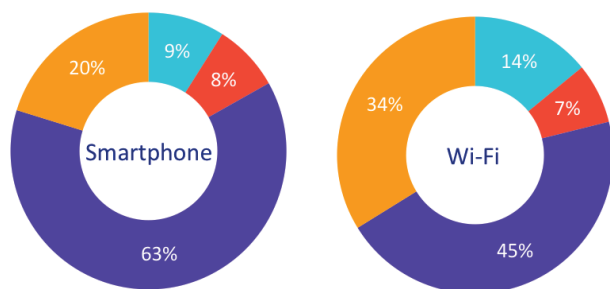


The research shows that many office workers who hold the contract with a phone provider (and claim a refund from their employer) don't know if they're on the cheapest network deal. This is the case for 57% of Spanish workers and 25% of Germans. For 59% of those using a smartphone for work

their employer has provided the phone and pays for the network usage (56%) in full. Not all employers cover these costs though. One in five office workers say they get no refund whatsoever from their employer to cover the costs of using their mobile devices for work purposes.

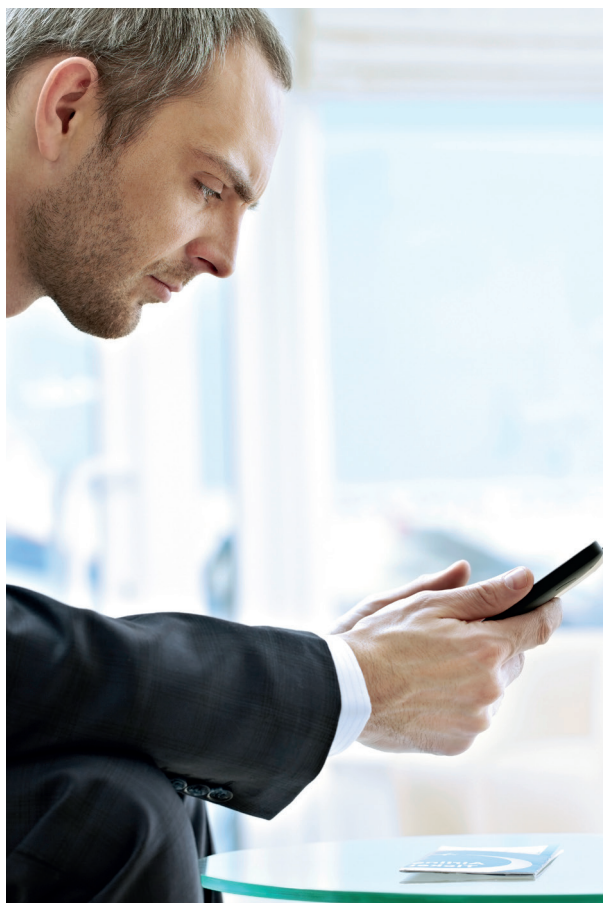
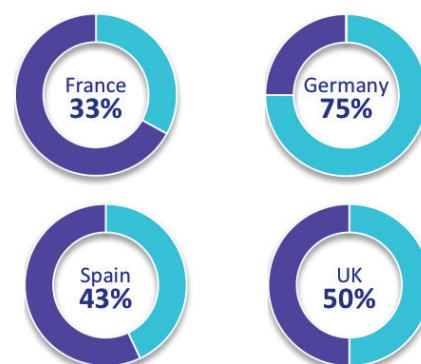
How is the bill paid for work use of your smartphone and Wi-Fi?

■ My employer pays the bill in full ■ My employer pays the bill but I have to contribute something ■ I pay my bill and I get a full or part refund from my employer ■ I pay the bill and receive no refund



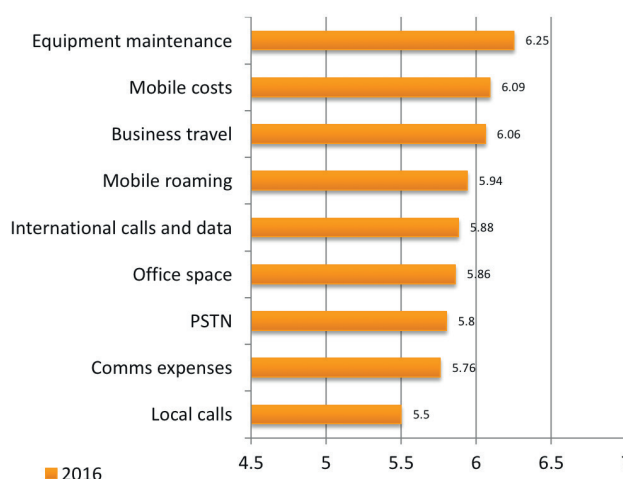
The IT decision makers interviewed reflected employers' broader concerns about the costs of mobile devices. One commented: "Smartphones are configured, we take deposits from users, limit roaming. At the end of the month we assess the pattern of expenditure for mobile devices." (Global distribution company).

I'm sure I'm on the cheapest mobile network (base - those who pay bill and employer refunds).



Priorities for reducing spend

Note: Scored on a ten point scale of importance to businesses



What do leaders need to think about?

- Is lack of access to mobile data limiting your employees' productivity?
- What could you do to reduce expenditure on mobile devices and monitor it more cost-effectively?
- Is the priority of your organisation to reduce IT and networking expenditure?

Methodology.

1,528 employees and office workers of large organisations in...

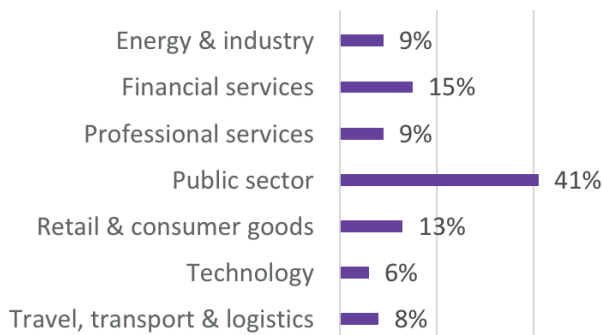
250
France

250
Germany

272
Spain

756
UK

Sectors.

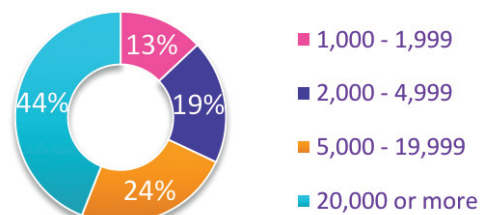


Function.

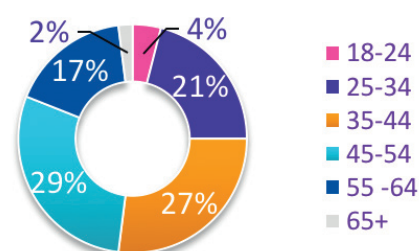


The research involved an independent survey of 1,528 office workers in large organisations in France, Germany, Spain and the UK, conducted by Davies Hickman Partners Ltd in September 2016. It covered the full range of office workers in terms of ages as well as a variety of sectors. Separate interviews were conducted with 10 IT decision makers to give an alternative perspective. The results of previous research on Digital Dislocation in the workplace earlier in 2016, sponsored by BT and Cisco, complemented the analysis.

Employee numbers.



Age.



Gender.



Foot note.

¹ - excludes those responding don't know and not applicable ² - excludes those responding don't know

³ - respondents who travel for work nationally and overseas ⁴ - excludes those who don't use this for work

The mobile multiplier. * Results in this report based on a balanced sample of 1,010 office workers in France, Germany, Spain and the UK.

How BT can help you deal with the mobile multiplier.

We understand you might be planning to change the experience offered to your colleagues to meet the opportunities of the mobile multiplier.

Wherever you are on your journey we can take you to where you want to be. As one of the IT decision makers we interviewed commented "Technology can do anything. My advice is to start with the end in mind, what it is your colleagues need to do their work better away from the office. When this is clear, the technology will fall into line." (Public sector).

If you want to improve a single area of mobility, embrace opportunities offered by the latest systems, we have the business understanding, the portfolio range and deployment expertise to help you build the effectiveness of your mobile working strategies.

For more information contact your BT account manager, visit one of our global showcases to see solutions in action, or visit bt.com for more information.

Offices worldwide

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