

Mobile Computing Survey 2018: The Results



Earlier this year, we set about collecting the thoughts of our customers and partners on mobile computing. Our goal was to see to what level the power of mobile technology is being harnessed in different industries, and to highlight areas of the market that could benefit from more support or information.

The results of TouchStar's Mobile Computing Questionnaire are now available, and they show an interesting picture of the landscape at present.

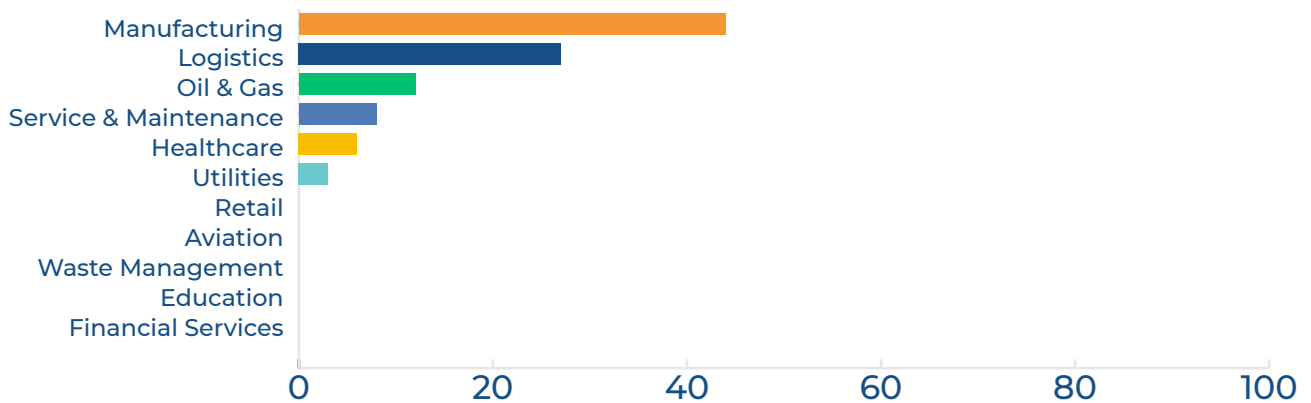
First of all, let's look at who gave us their thoughts for the survey.



Business types

Industry-wise, it was pretty clear who we were hearing from. Almost half of our responses (44 per cent) came from Manufacturing businesses. The second and third biggest groups to take part were Logistics companies (26 per cent) and Oil & Gas firms (12 per cent) - perhaps unsurprising given TouchStar's own product focus.

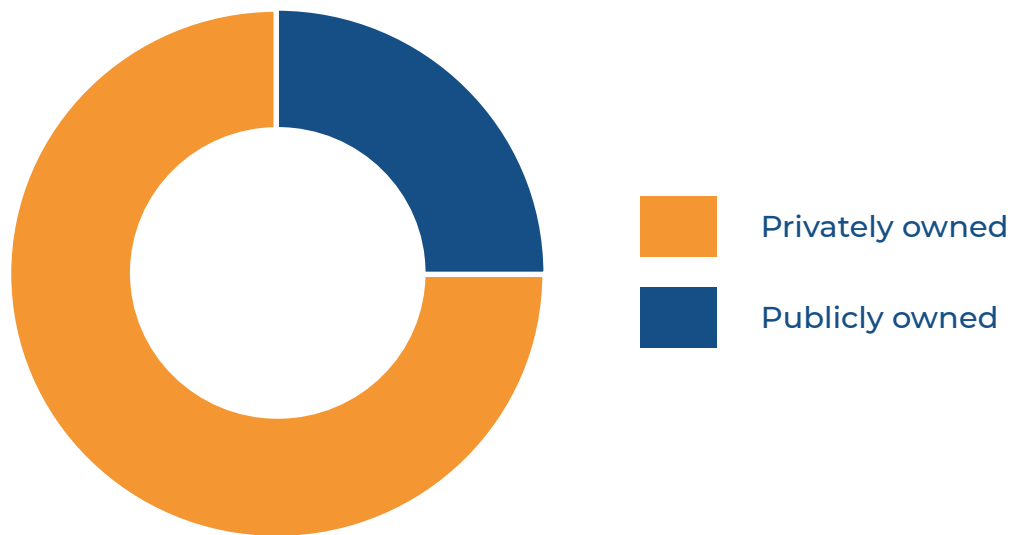
Q2 What vertical sector does your company operate in?



We also heard from organisations in the Healthcare, Utilities and Service & Maintenance sectors, helping us to gain well-rounded picture of mobile computing use.

It's also interesting to note that 75 per cent of responses came from privately-owned organisations.

Q1 Is your organisation publicly or privately owned?

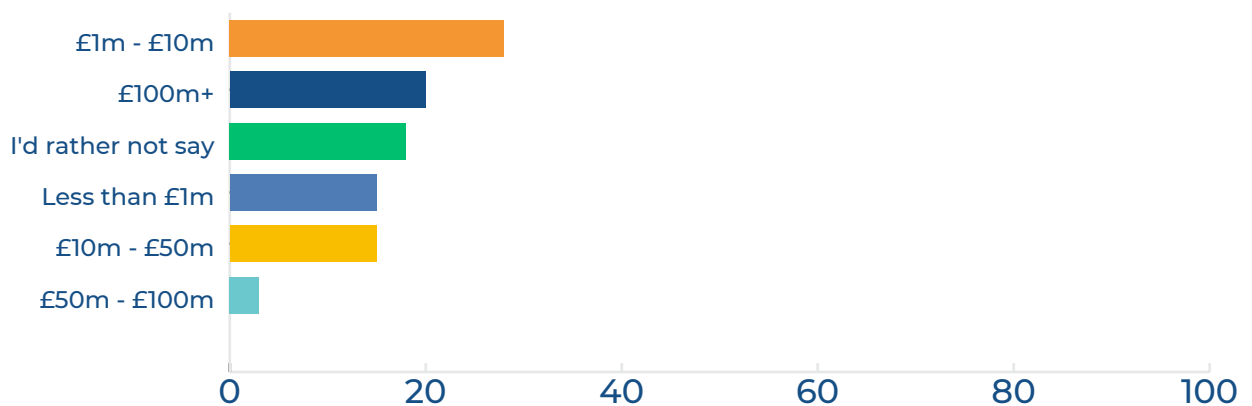


Business sizes

Responses to the survey came from businesses of various sizes. Fifteen per cent of participants reported an estimated annual turnover of less than £1 million, while 28 per cent – the biggest group - said they generate between £1 million and £10 million. A further 18 per cent reported annual turnover between £10 million and £100 million, with a substantial 20 per cent saying they make more than £100 million per year.

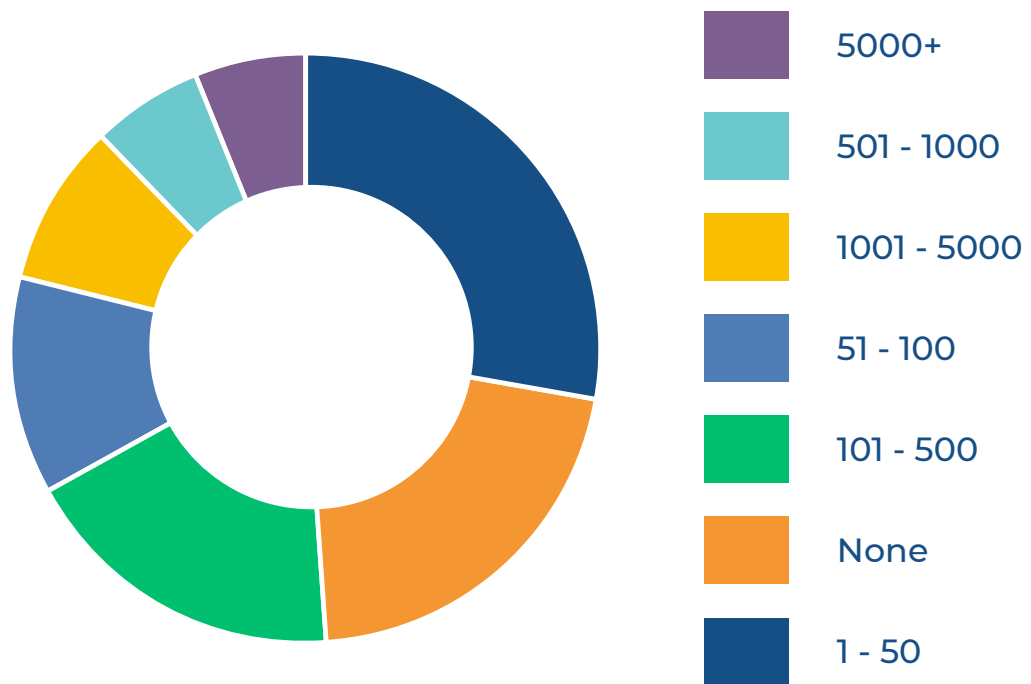
The remaining respondents declined to answer this question.

Q5 What is your company's estimated annual turnover?



We also looked into workforce size, and more specifically, the size of each respondent's mobile workforce – i.e. employees working out in the field. Of those that answered, 27 per cent have between 1 and 50 field workers (making this the largest group); 12 per cent answered 51 – 100 and 18 per cent said 101 – 500. Interestingly, six per cent of respondents said they had more than 5000 mobile employees.

Q8 How many mobile / field workers are there in your organisation?



More than 70 per cent of the companies asked also operate commercial vehicle fleets of some size, further implying a need for mobile computing solutions.

Mobile computing use

After gathering general information on our respondents, we looked at their use and ownership of mobile computers.

The biggest finding here was that 80 per cent of responding companies have invested in mobile computers on some level. Almost half (43 per cent) have between 1 and 100 devices at present, while 13 per cent said they own between 101 and 500. A further ten per cent answered '501 – 1000', three per cent said '1001 – 5000' and, interestingly, one-in-ten respondents claimed to have more than 5,000 mobile computers.

As for usage, 60 per cent of respondents said they rely on mobile devices for data capture specifically. To get a more detailed picture, we then asked about the types of applications they have deployed on their devices, and we discovered a wide range of mobile computing functionality.

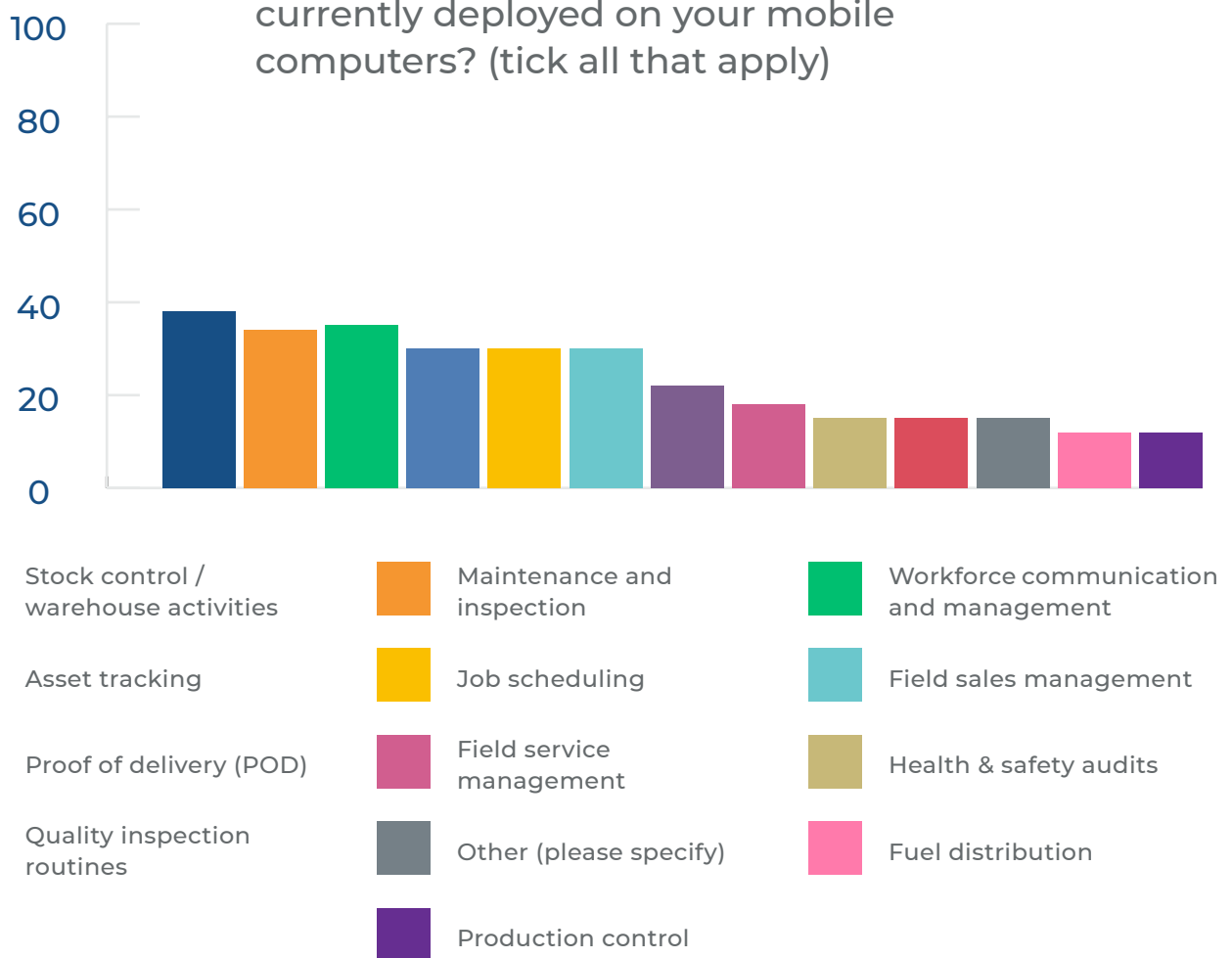
Q10 Are you currently using mobile devices for data capture within your organisation?



Although the answers were spread relatively evenly, the most common response was 'stock control/warehouse activities', with 38 per cent. One third of respondents cited 'workforce communication and management', another third said they used 'maintenance and inspection' software, and 31 per cent mentioned 'job scheduling'.

Other notable applications included field sales management and asset tracking (both 31 per cent), proof-of-delivery (POD) (23 per cent), field service management (19 per cent) and health & safety audits (15 per cent).

Q13 What software applications are currently deployed on your mobile computers? (tick all that apply)

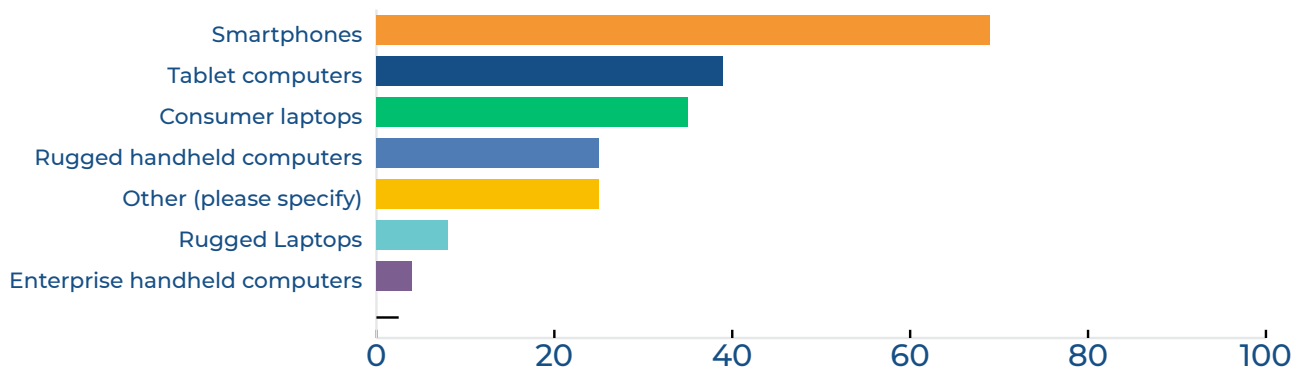


Device types and systems

It's been interesting to look at the types of hardware businesses are implementing too.

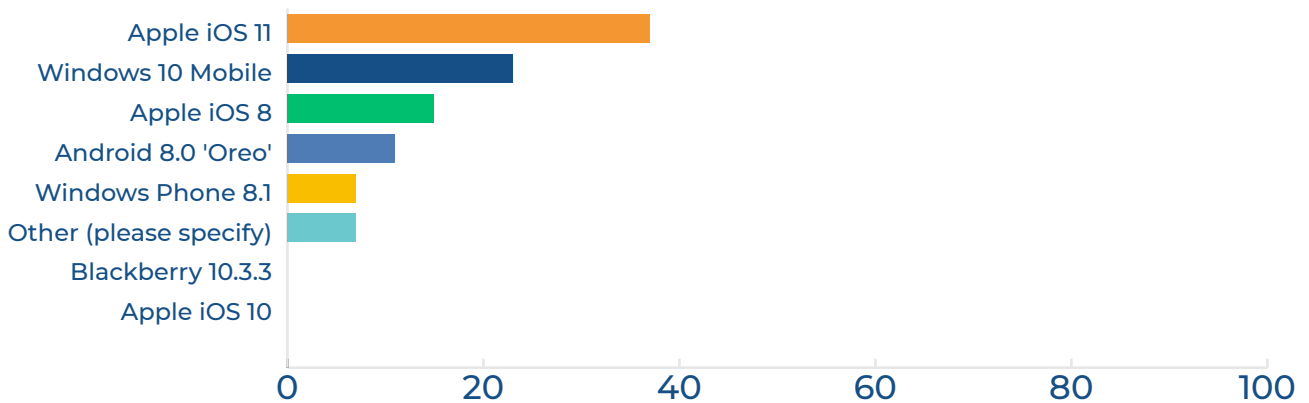
The majority of those that have invested in mobile computers, perhaps unsurprisingly, have smartphones (69 per cent). Tablet computers were the second most popular device (used by 39 per cent), while consumer laptops (35 per cent) and rugged handhelds (26 per cent) followed. Smaller groups of respondents use enterprise handhelds (four per cent) and rugged laptops (nine per cent).

Q11 If you answered 'yes' to Q10, what type of devices are used? (tick all that apply)



As is the case in the consumer market, there are notable divides between the operating systems being used. Preferred by 37 per cent of our respondents, Apple's iOS 11 is currently the most popular platform. Windows 10 Mobile came in second with 22 per cent, while Apple iOS 8 (15 per cent) and Android 8.0 (Oreo) (11 per cent) followed.

Q14 Which operating system do the majority of your devices run on?



The results here showed that most organisations are staying on top of OS updates, though – none of our Apple-preferring respondents are using iOS 7 or older, and all Android users are on the latest full release, 2017's Android 8.0.

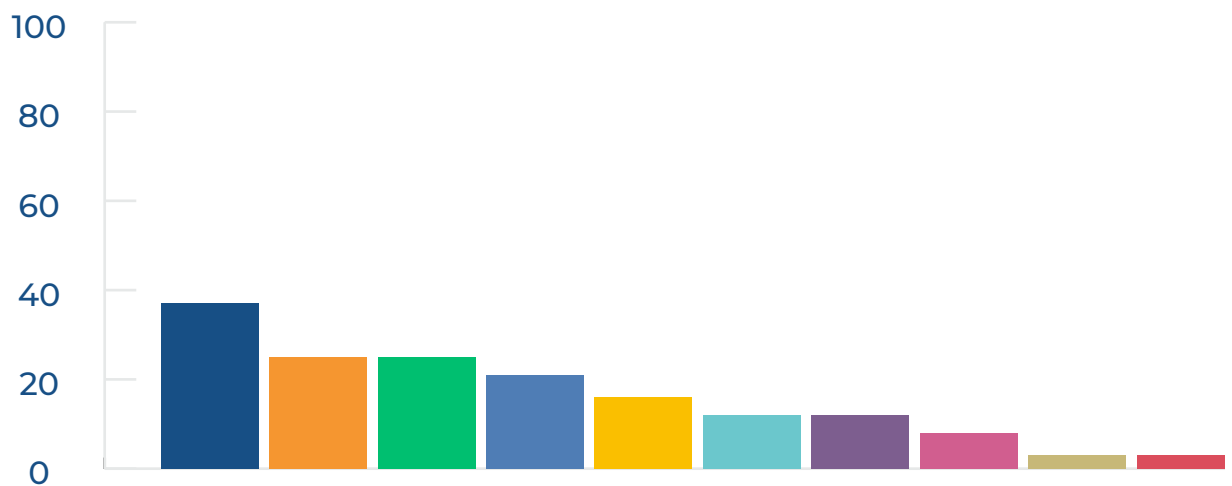
Investing, now and in the future











Three-quarters of the companies we spoke to have invested significantly in some kind of technology in the past three years, with ERP/general administration software the most common purchase (cited by a third of these respondents). Almost 30 per cent spent on business intelligence tools, while 25 per cent secured new mobile applications.

In line with the wider survey, we found that one-in-five businesses have implemented mobile device management tools since 2015.

Looking ahead, 37 per cent of companies said they've no plans to spend on new solutions in the next three years, which suggests ample opportunity for those who do intend to invest to gain a possible competitive advantage. Of those who do intend to invest, most are likely to focus on mobile applications, cloud computing and mobile device management tools.

Q16 Do you envisage any significant investments being made by your organisation in any of the following areas over the next three years? (tick all that apply)



-  None
-  Mobile application software
-  Cloud computing
-  Mobile device management software
-  Business intelligence / dashboard software
-  Specialist back-end software
-  Consumer-grade mobile computing hardware (smartphones, tablets etc.)
-  Rugged mobile computing hardware
-  ERP / general administration software
-  Other (please specify)

Investment motivations and hindrances

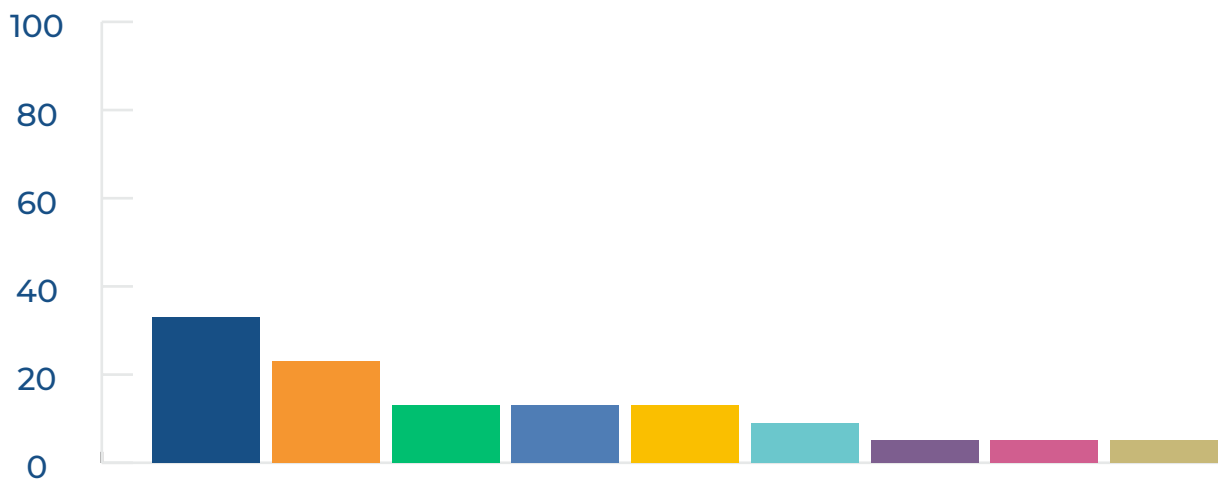
So, what's driving technological investment for today's businesses? According to our results, profitability is still key; it was cited as the most important consideration by 36 per cent of our respondents. Productivity was ranked top by 25 per cent, while operational efficiency was picked as the priority by 21 per cent. Interestingly, the opportunity to streamline and consolidate operations was chosen as the least important factor by 41 per cent of the businesses we spoke to – the largest of any group response.

We found as well that external consultants hold a lot of power when it comes to mobile computing investment; 40 per cent of our respondents said their advice is 'very influential'. Industry association advice was deemed to have similar level influence by 28 per cent of companies.

Industry trade shows (18 per cent), internet searches (17 per cent) and consultant/supplier white papers (17 per cent) completed the top five. Almost half (44 per cent) of responding businesses claimed to completely ignore trade magazine editorials and advertisements when considering mobile computing investments.

As for hindrances, we found finance to be the most common stumbling block for mobile tech-hungry businesses - a third of our respondents cited background economic factors as the main factor preventing them from investing more. A lack of conviction from board-level personnel as to the cost-benefits of mobile technology was chosen by 24 per cent of those asked, while 14 per cent worry about legacy system compatibility. Other obstacles included confusion around the likely return-on-investment (ROI) (14 per cent) and resistance from operational personnel (ten per cent).

Q18 Are any of the following factors preventing the wider adoption of mobile computing solutions within your organisation? (tick all that apply)



- Background economic factors
- Lack of conviction from board-level personal as to cost-benefits
- Confusion around the business case and/or likely return on investment (ROI)?
- Anticipated difficulty of integrating with legacy systems
- Other (please specify)
- Resistance from operational personnel
- Lack of credible technology suppliers
- Too many technology suppliers making selection difficult
- Insufficient internal financial report

A healthy industry with room to grow

Our survey results show that businesses are embracing mobile technologies, and they're clearly thinking carefully about where to invest. There's undoubtedly still room for the market to grow, however, with plenty of game-changing benefits for investment-hesitant organisations to discover.



To find out more about TouchStar's range of mobile hardware solutions and how they could help your business, browse the [website](#) or [get in touch](#) with our expert team today.

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