

2023 Enterprise Mobility Outlook

Research Shows Companies are
Leveraging Mobile Technology to
Succeed in Uncertain Times

*Data and analysis provided by
Hanover Research*

Executive Summary

Stratix's Annual Enterprise Mobility Outlook Report Looks at How Businesses Leverage Technology to Reduce Uncertainty and Risk

After years of pandemic-related disruption, enterprise leaders are still hedging strategies in the face of extreme uncertainty. The economic outlook is murky—with signs of a possible downturn as federal regulators fight inflation with higher interest rates. Supply chain issues are still with us, and the ongoing war in Ukraine is impacting energy costs.

While nobody has a crystal ball, it is clear that the current climate means businesses must be as nimble and efficient as possible so they can handle whatever difficulties may come—and be positioned to take advantage of whatever opportunities pop up. The Stratix 2023 Enterprise Mobility Outlook research shows that companies are investing in mobile solutions to do just that. Eighty-six percent are using more mobile now than in the last three years, and 97 percent say mobile is very, or extremely, important to their business.

How Does Mobile Position Companies to Weather Uncertainty?

Research respondents said their top five reasons for investing in mobile include increasing productivity, improving workflows, enhancing internal collaboration, upgrading the employee experience, and boosting customer service. In other words, mobile solutions are a way for enterprises to get the nimbleness and efficiency they need at a cost they can get behind. Despite the unclear economic path ahead, the benefits and high return on investment with mobile are an incentive to deploy more of it.

97% say mobile is important to business

Mobile is Changing

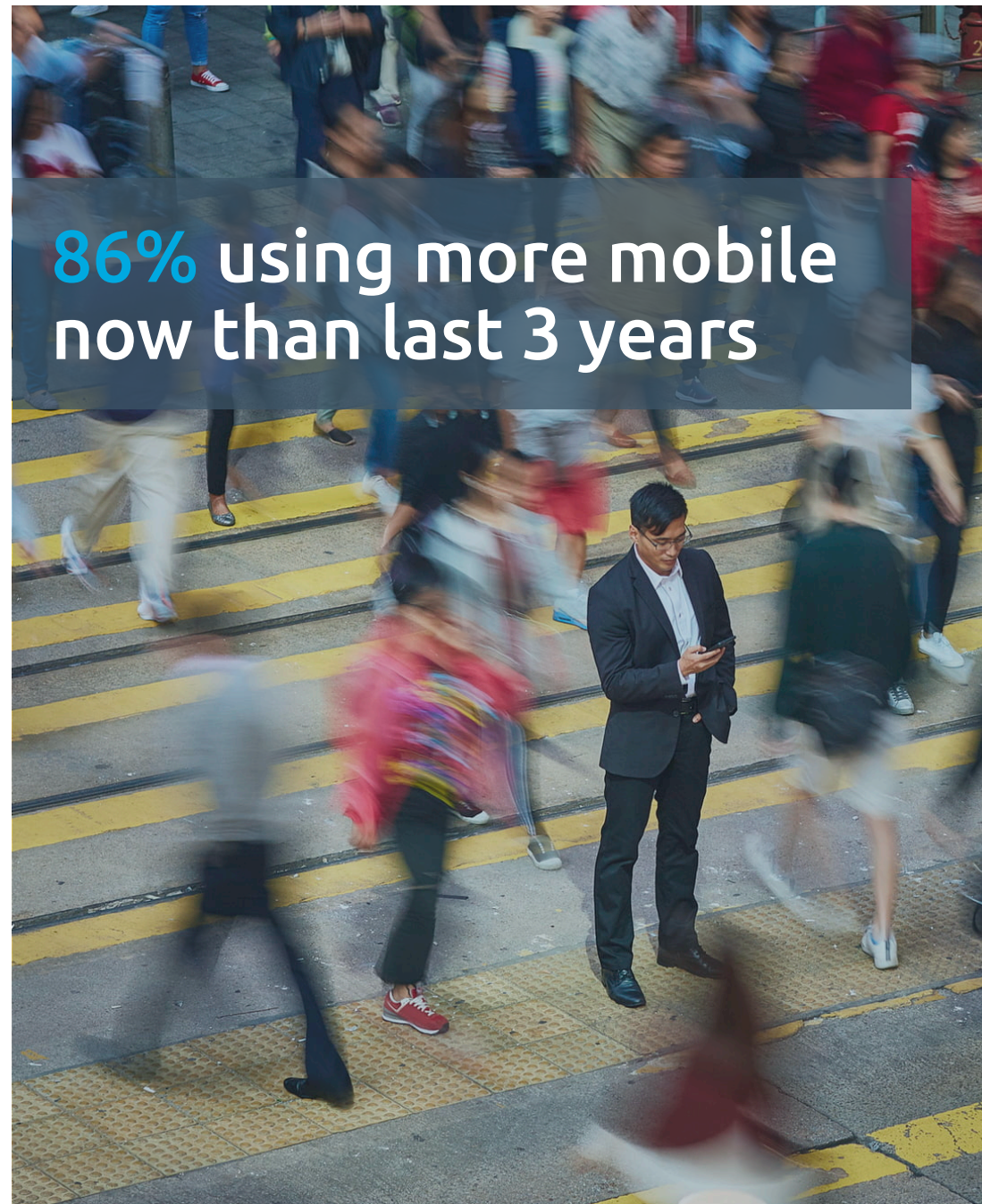
The use cases for mobile are evolving along with the kinds of mobile devices utilized. Fifty-nine percent are leveraging more wearables in workflows now than in the past three years. Hands-free devices are convenient and help workers be more productive. Sixty-seven percent say they're using more Internet of Things. IoT offers a wealth of data around behavior, processes, performance, and more that enterprises can use to reduce costs, increase efficiency, boost productivity, improve customer experiences, and make better strategic decisions. The arrival of 5G has opened the door to more ways to leverage IoT business solutions.

Eyes Ahead

The fast pace of technical innovation also has enterprises looking at the future. Seventy-eight percent say emerging tech is impacting their overall IT management strategy, and about the same number say emerging tech is pushing them towards more comprehensive endpoint management strategies. Many companies began by deploying mobile solutions piecemeal leading to an overly complex mishmash of management platforms, which is highly inefficient. Now, they're moving to holistic strategies that help them wrap their arms around the proliferation of technology to simplify operations.

Challenges and Solutions

While enterprises know the value of mobile, many face challenges in designing, deploying, and supporting mobile solutions. Read on as the 2023 Enterprise Mobility Outlook digs into why there are challenges and how companies solve them through partnerships with experts.



How We Did the Research

The Methodology

Hanover used an online quantitative survey to gather information from 300 qualified participants to accomplish our research objectives. Responses to the survey questions are calculated at a 95 percent confidence level.

Figure 2.1

Role in Selection/Purchase of Mobile Technology

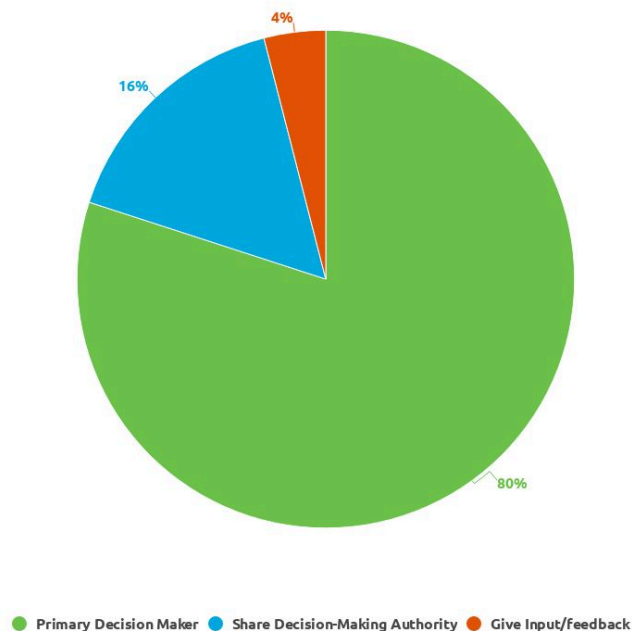
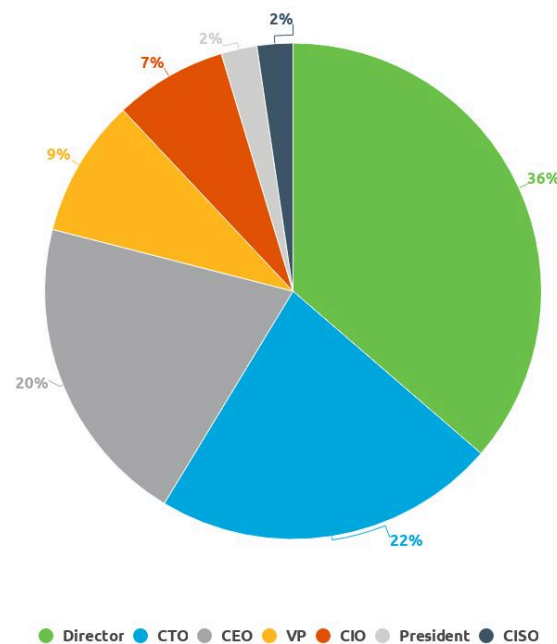


Figure 2.2

Job Role



Respondent Profile

Acceptable survey respondents were from enterprise organizations with over 1,000 employees currently utilizing mobile technology.

To ensure our respondents were knowledgeable about implementing and managing mobile solutions, they also had to be involved in the decision-making process for purchasing technology and IT products at the organization. Their job roles spanned IT and operations, with all respondents at the director level and above (see Figures 2.1 and 2.2).

Key Questions We Set Out to Answer

With the research, we wanted to get a complete picture of how much enterprises depend on mobile, what challenges they face, and how they solve them. So, we set out to answer these key questions:

- How much has mobile use grown?
- How important is mobile now to business operations?
- What are the use cases driving the growth of mobile?
- How is emerging technology shaping IT strategy?
- What are the challenges with deploying and managing mobile solutions?
- In what ways are companies using MMSPs to take on those challenges?

2023 Enterprise Mobility Outlook Analysis

Stratix Senior Vice President of Marketing Elizabeth Klingseisen shares some of the most interesting findings from this year's research.

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The background of the slide features a dense pattern of overlapping squares in various shades of blue and green. The squares are arranged in a way that creates a sense of depth and movement, with some squares appearing more prominent than others. The overall color scheme is a gradient from dark blue on the left to light green on the right.

Mobile Now a Leading Tool for Enterprises

Mobile Now a Leading Tool for Enterprises

Companies Moving to Mobile-First or Mobile-Only

Our research confirms what Stratix routinely hears from our customers. The corporate view of mobile solutions has entirely evolved from a "nice to have" to now being critical to success. Ninety-seven percent of 2023 Enterprise Mobility Outlook respondents said mobile is very, or extremely, important to their business (see Figure 3.1).

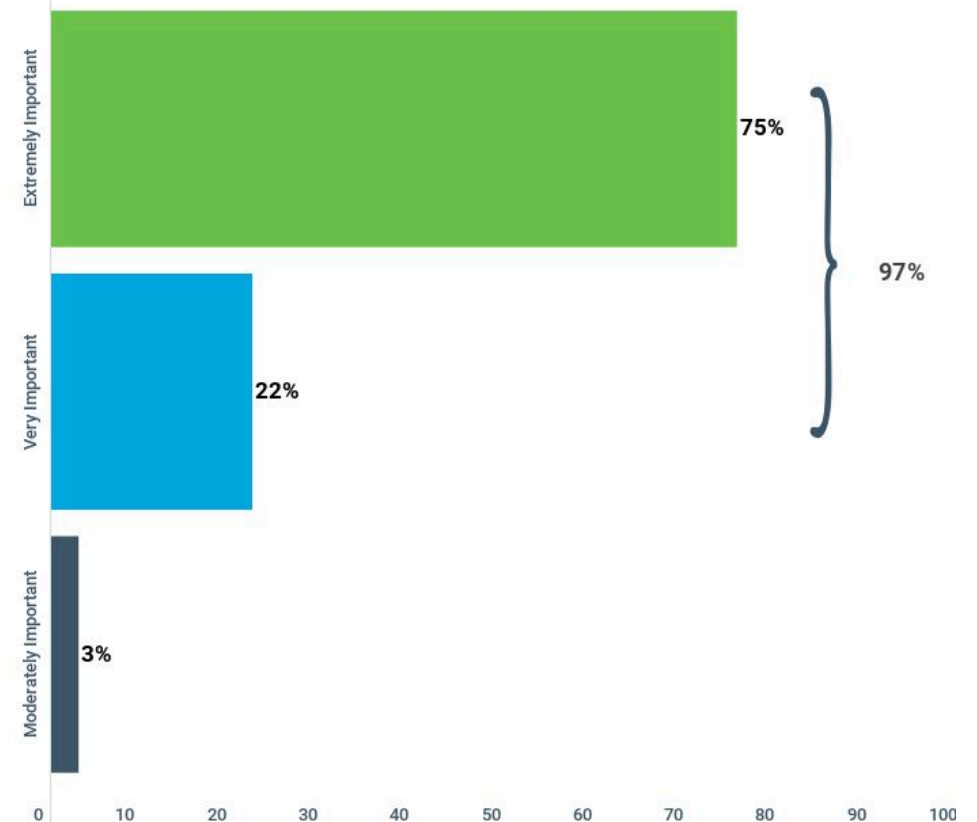
It's easy to see why. Mobile solutions drive:

- Nimbleness
- More efficiency
- Superior user experiences
- Higher ROI
- Better business outcomes

Those are outcomes that business leaders always want to see, but they are especially valuable for combating uncertainty—economic or otherwise. Nimbleness, efficiency, and a high ROI help organizations weather tough times and move faster to take advantage of new opportunities.

Figure 3.1

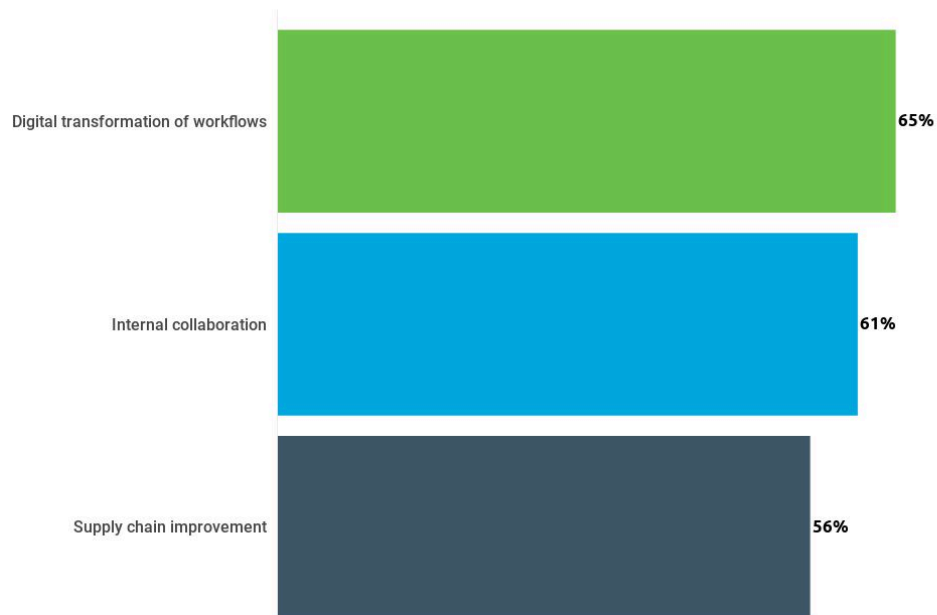
Importance of Mobile Devices to Organization Success



Alternative financing models like Device as a Service not only give companies the ability to scale up or down in reaction to economic conditions quickly, but they empower them to claim the high ROI of mobile solutions while also moving technology costs from the capital expenditure column. Our research shows organizations are prioritizing implementing mobile solutions for digital transformation, improved internal collaboration, and supply chain improvements, amongst other use cases (see Figure 3.2).

Figure 3.2

PRIORITY UP-AND-COMING MOBILE SOLUTION USE CASES

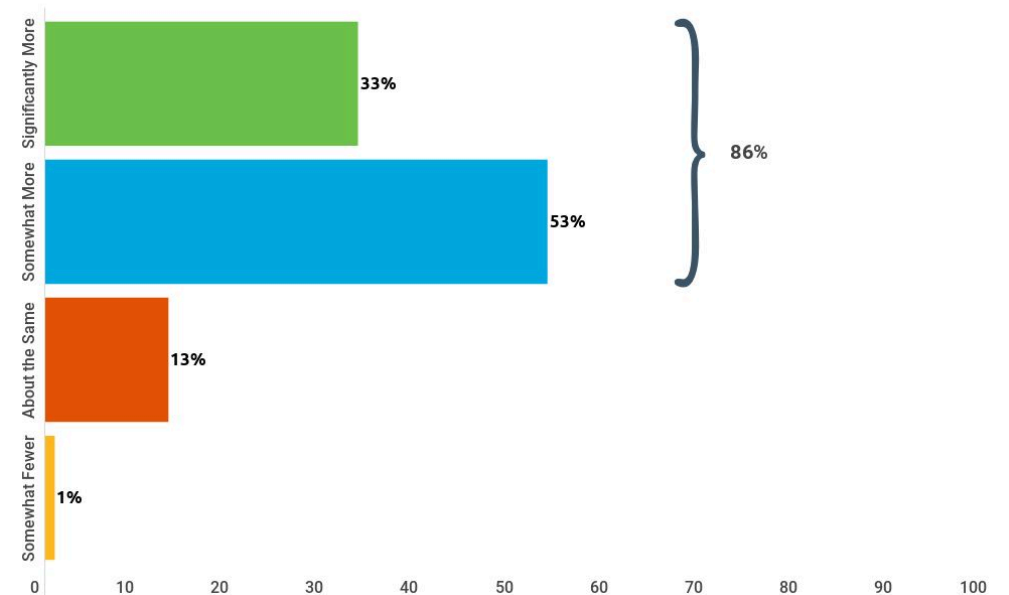


The top three priorities align with the need to evolve, work smart, and solve current headaches.

The adoption of mobile technology is moving at a fast pace. Eighty-six percent of organizations are using more technology now than in the past three years, with 33 percent saying it's significantly more (see Figure 3.3).

Figure 3.3

PROLIFERATION OF MOBILE DEVICES IN PAST THREE YEARS



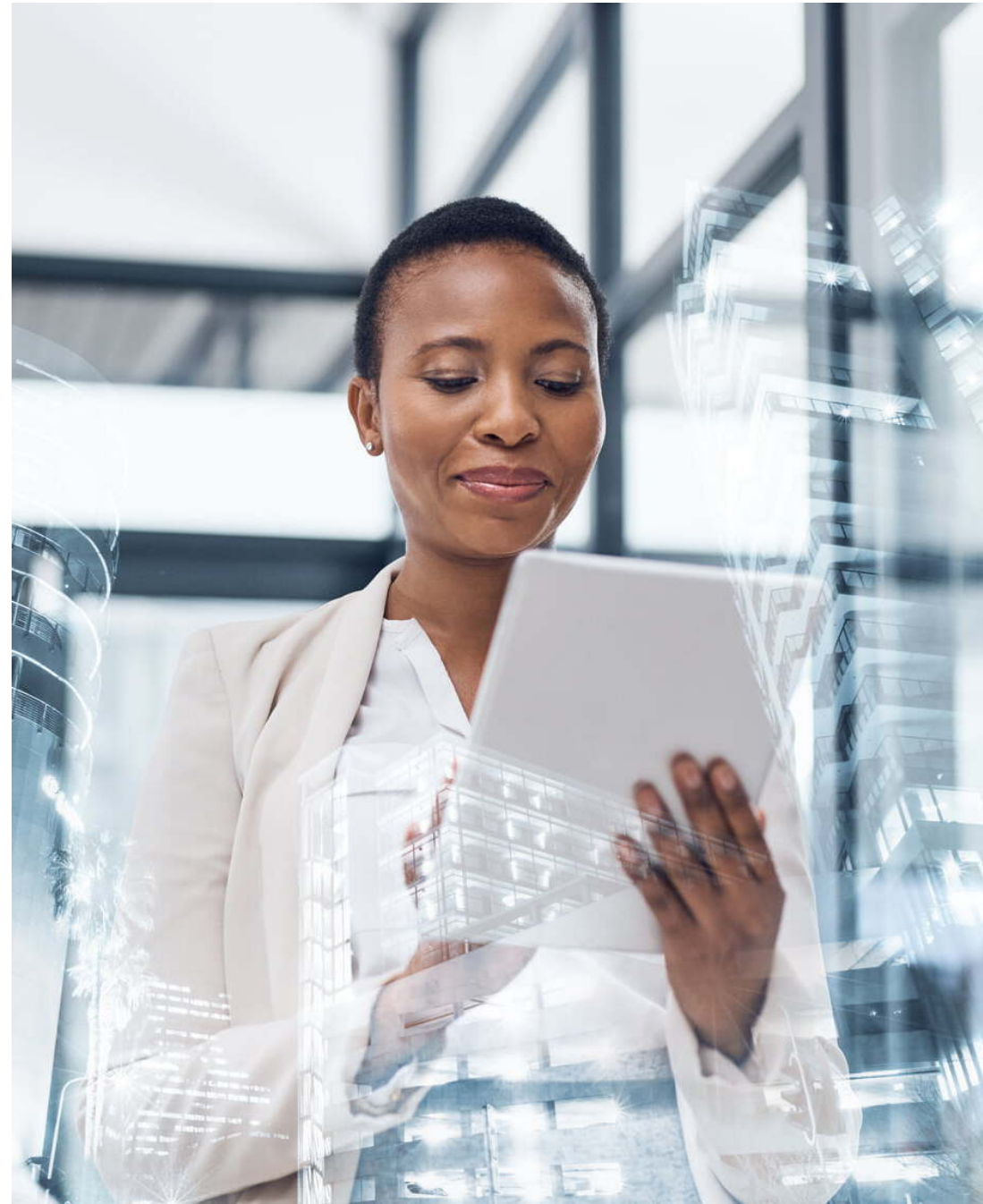
When asked about their reasons for investing, the top five answers were increasing productivity, improving workflows, internal collaboration, improving employee experience, and helping customers (see Figure 3.4).

Figure 3.4

REASONS FOR USING MOBILE DEVICES



It's clear that mobile devices save time and improve communication. Employees prefer mobile devices whenever possible, and they empower them to do a better job of helping customers.



Enterprises are Evolving Workflows as Mobile Technology Improves

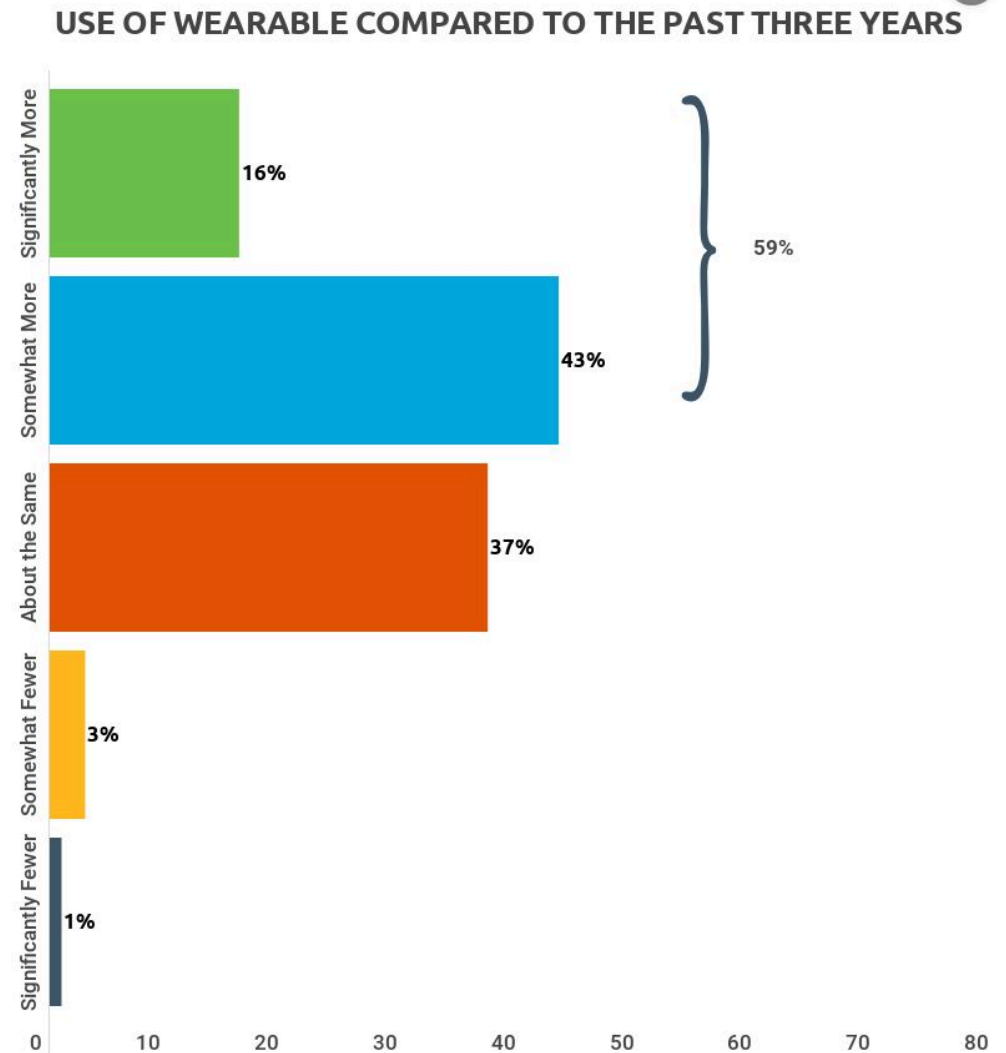
As mobile technology has gotten smaller, lighter, and more wearable, companies are using it in new ways. Smartwatches send alerts and other communications that workers quickly see and respond to. Wearable scanners assist store associates in picking inventory for curbside pickup. It's common now to see a waiter wearing an arm-mounted device to take orders and payment. Nearly 60 percent of our respondents told us they're using more wearable technology now in workflows than in the past three years (see Figure 3.5).

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59% of enterprises are using more wearables now than in the past 3 years

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Figure 3.5



Emerging Technology is Fulfilling its Promise

Another trend we see in the 2023 Enterprise Mobility Outlook is the increasing use of evolving technology like Internet of Things (IoT) devices. The use cases for connected devices are almost limitless, and 5G connectivity has made it easier to deploy exponentially more of them. The medical field uses IoT for remote patient monitoring. Retailers are doing everything from gathering data on customer behavior to installing "smart" shelves that know when something is removed from inventory. Industrial IoT is improving quality control, supply chain logistics, and much more. Advanced 5G use cases and the expansion of private 5G networks will accelerate IoT growth. Sixty-seven percent of our respondents said their organizations are using somewhat or significantly more IoT now than in the past three years (see Figure 3.6).

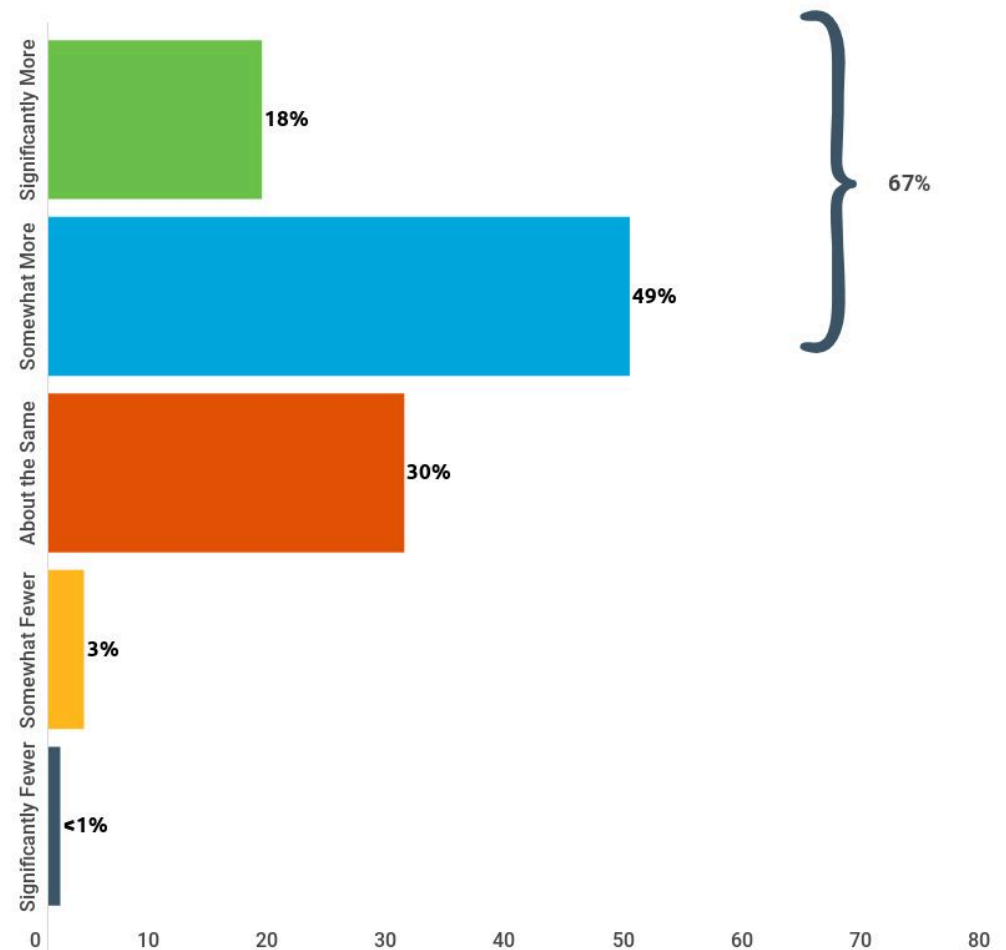
67% of enterprises said their organizations are using more IoT now than in the past 3 years

2023 Enterprise Mobility Outlook, Hanover Research

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Figure 3.6

USE OF IOT DEVICES COMPARED TO THE PAST THREE YEARS



One of the enormous benefits of IoT is the ability to create a real-time view of operations—including behavior, processes, performance, and more. Businesses use that data to quickly make strategic decisions and adjustments that foresee and correct problems, reduce costs, increase efficiency, boost productivity, improve customer experiences, and grow profits.

The fast pace of technological development and the enormous benefits enterprises reap from it have made them realize they must be ready to adapt and change faster to stay ahead. Seventy-eight percent of our respondents said emerging tech has had a moderate, or major, impact on overall IT management strategy (see Figure 3.7).

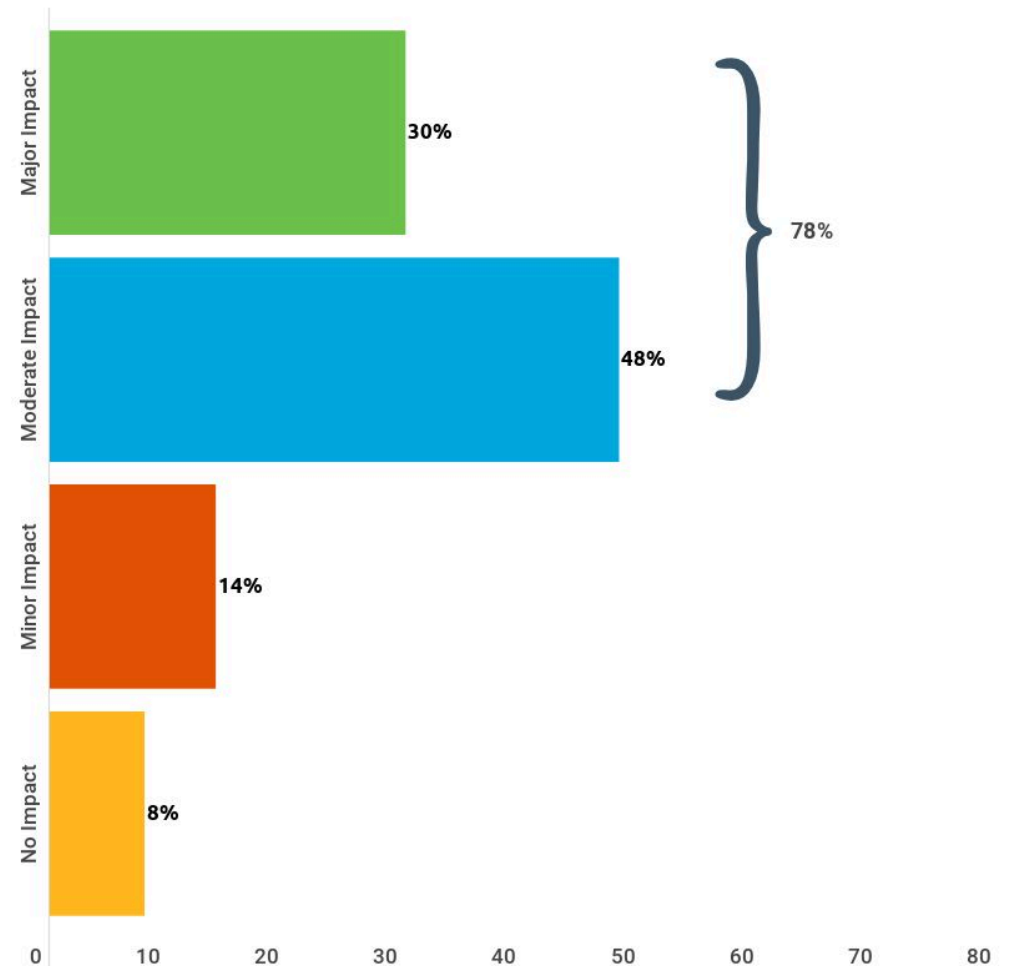
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77% of enterprises say emerging tech is pushing them towards more comprehensive endpoint management strategies

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Figure 3.7

IMPACT OF NEW/EMERGING TECHNOLOGIES ON OVERALL IT MANAGEMENT STRATEGY



Three-quarters also told us that emerging tech will impact their relationships with vendors and partners. That's not surprising, given that many enterprises don't have the internal expertise, time, or resources to keep up with new technology developments and look for potential use cases that improve business functions. They need partners who do.

The proliferation of mobile solutions means there are exponentially more devices for IT teams to support. Seventy-seven percent of respondents told us emerging technology will push them towards more comprehensive endpoint management strategies. IT teams once only had desktops, networks, and servers to worry about. Now, they're maintaining smartphones, tablets, wearables, and a constellation of IoT.

Many of those solutions have independent endpoint management platforms—which only adds to the complexity and workload. New and better Enterprise Mobility Management (EMM) solutions allow teams to control, update, and secure everything from a single pane of glass.

Successful Companies are All-In On Mobile

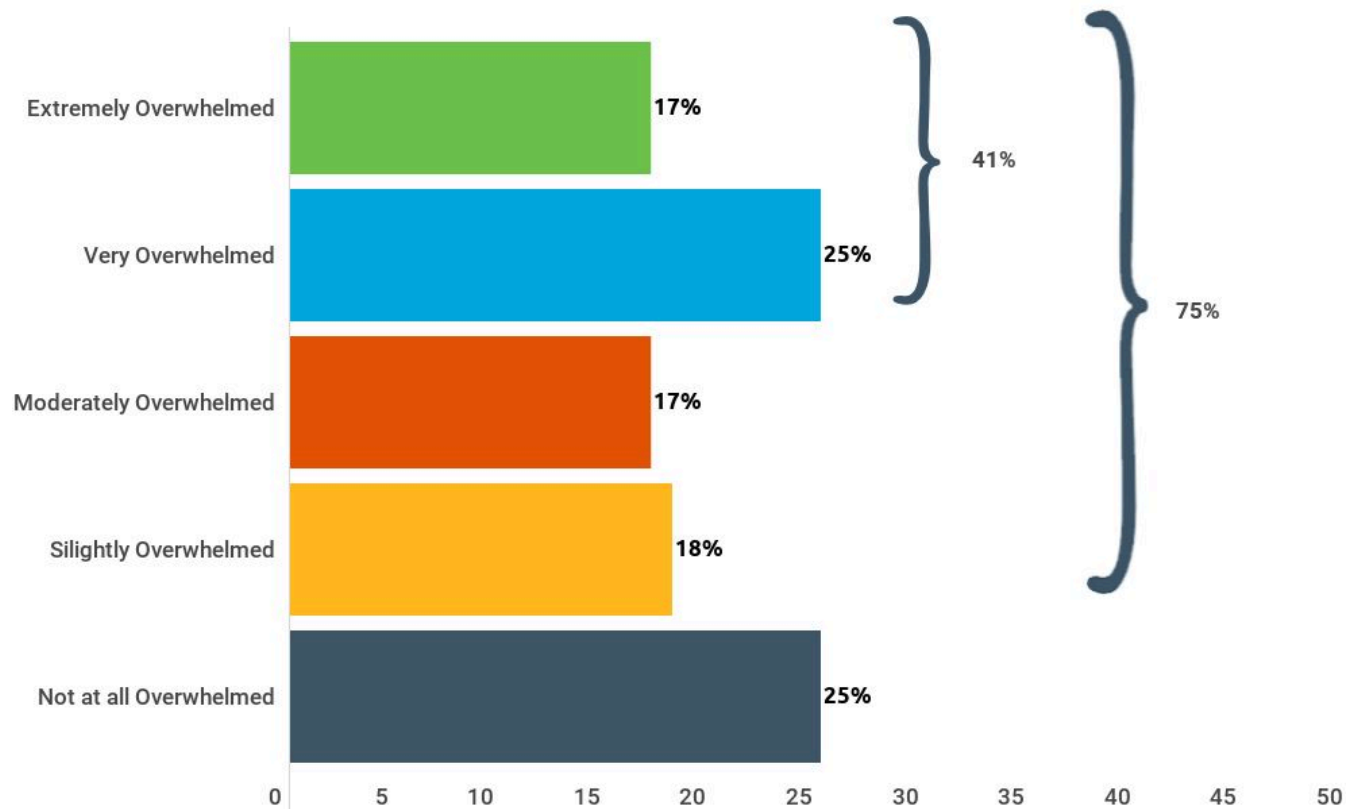
The 2023 Enterprise Mobility Outlook paints a clear picture of the use of mobile solutions within corporations. Only a tiny percentage don't see mobile as a major factor in success. Those that aren't leveraging mobile and looking for more ways to take advantage of it run the risk of being left behind by competitors and unprepared for disruption—whether that be economic or other factors like changing consumer behavior.



What are the Challenges with Mobile for Enterprise?

Figure 4.1

SENTIMENT TOWARD INCREASE IN NUMBER OF MOBILE DEVICES



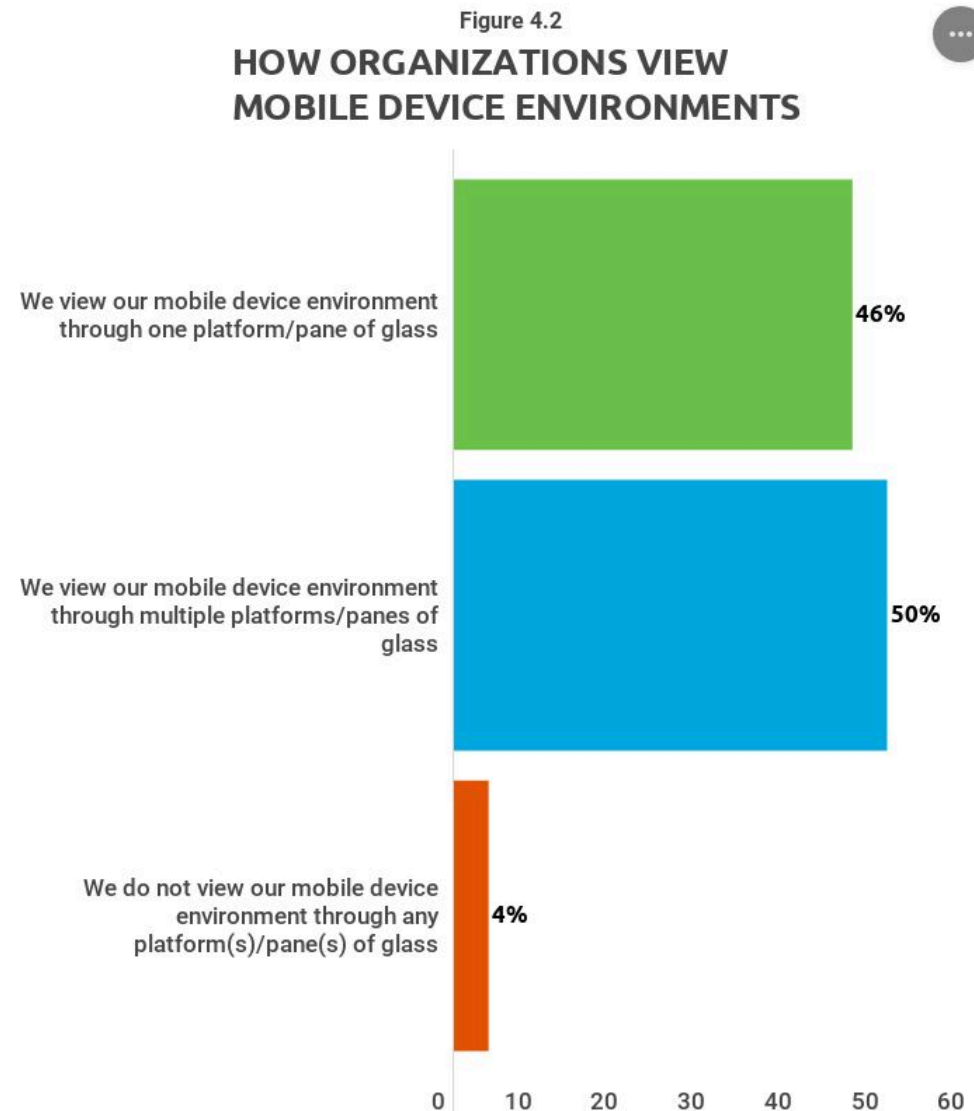
Device Proliferation is Taxing IT Team Resources

While enterprises are embracing mobile solutions, they're having trouble keeping up with all that they've deployed and want to deploy. Seventy-five percent of respondents told us they're at least somewhat overwhelmed by the increasing number of mobile devices, with 41 percent putting it at very or extremely overwhelmed (see Figure 4.1).



Digging into those numbers, we found two of the biggest challenges with deploying mobile solutions in-house are endpoint security and cost controls/reporting. Fifty-four percent said they've experienced new security concerns related to mobile in the last three years. With so many devices—and often associated data plans to manage—visibility is difficult. Managers often don't know where everything is, or unexpected costs can blindside them. 54% can't see their entire mobile device environment from a single pane of glass—meaning they're juggling multiple endpoint management platforms—which adds to the complexity they're struggling with (see Figure 4.2).

54% of IT professionals said they've experienced new security concerns related to mobile in the last 3 years.



The lack of visibility means IT leaders don't have a good understanding of the well-being of their mobile infrastructure. When asked which analytics would be most helpful, the top responses centered around conditions and use (see Figure 4.3).

Resources are also an issue. Nearly half said they're struggling with staff shortages. Even with economic uncertainty, the challenge of finding enough qualified employees is likely to continue.

Figure 4.3

HELPFUL DATA ANALYTICS FOR MOBILE DEVICES

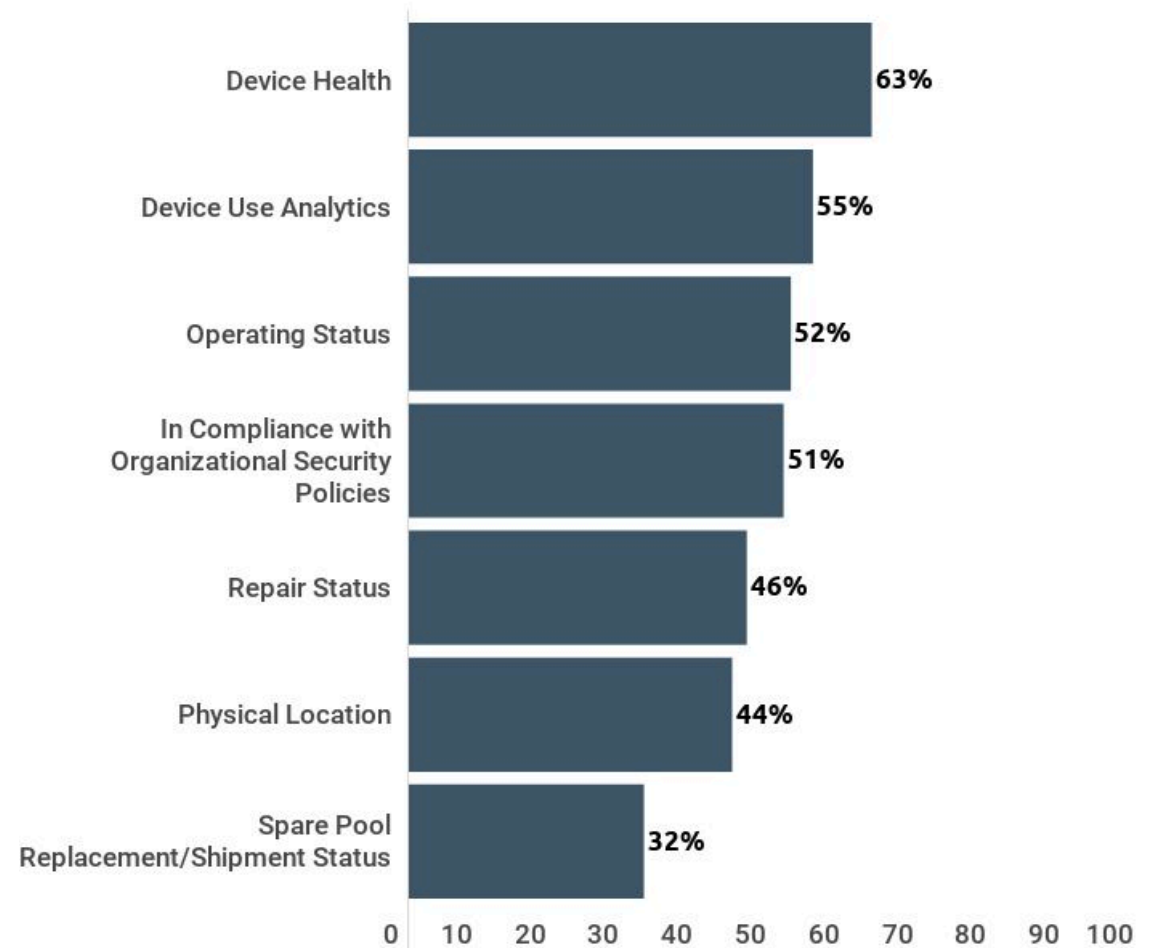
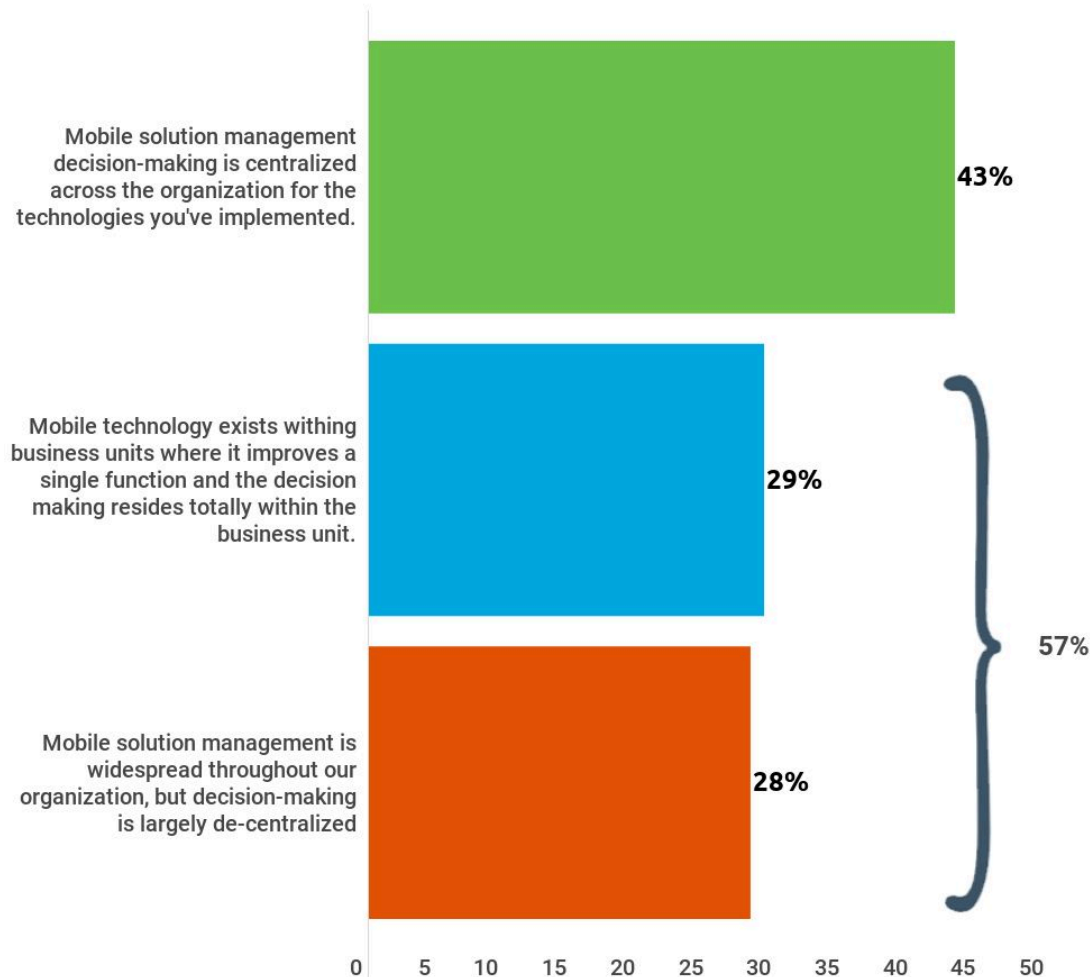


Figure 4.4

EMBEDMENT OF MOBILE SOLUTION MANAGEMENT IN HIGH-LEVEL BUSINESS STRATEGY



Big Picture Strategy is Missing

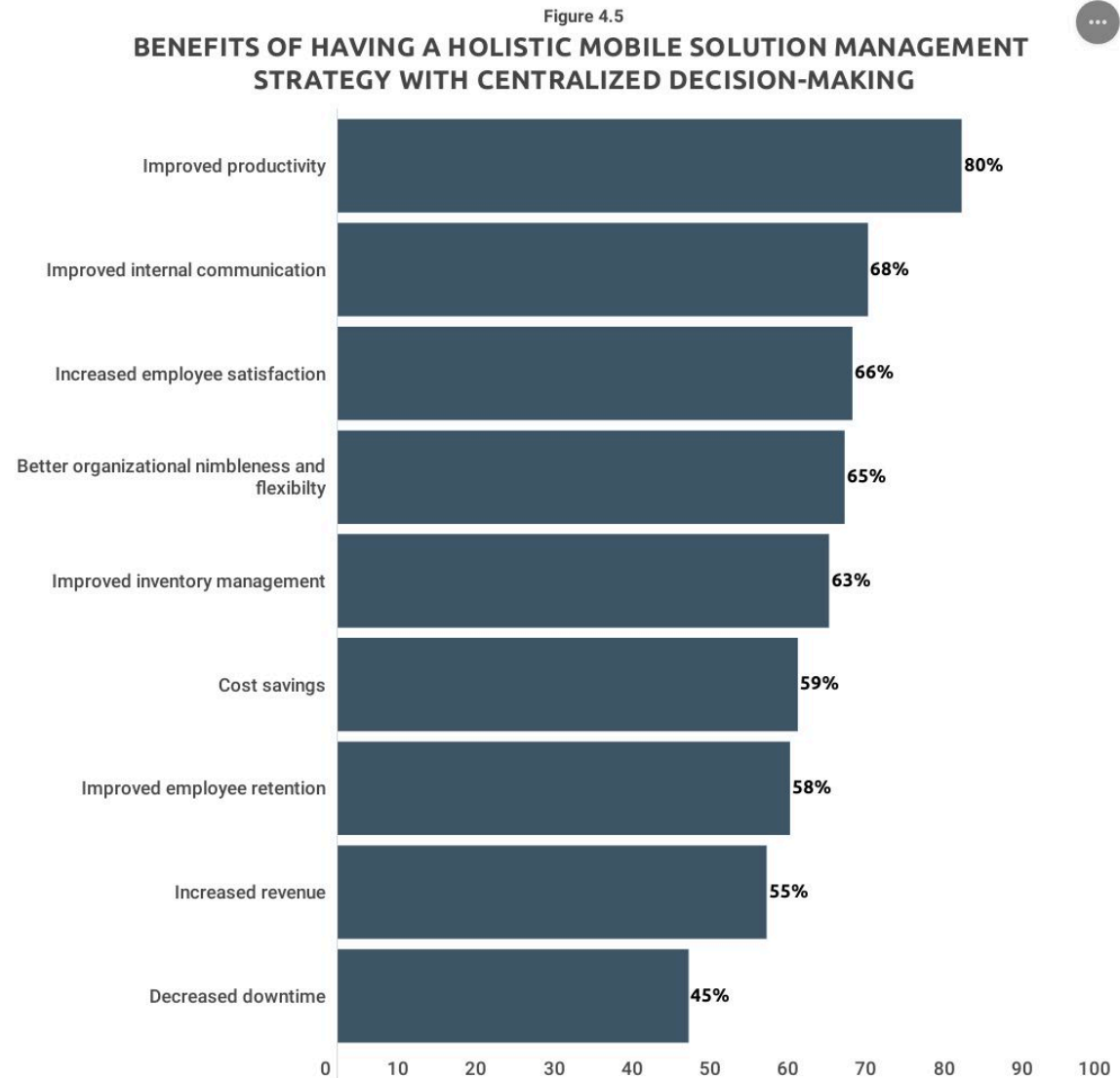
As enterprises have adopted mobile solutions, it's often been done piecemeal and within the various business units that need them. Our research found 57% of organizations don't have centralized mobile solution management decision-making (see Figure 4.4).

The lack of a holistic mobile strategy across the entire organization means organizations often don't see where there are opportunities for scale, potential savings, and increased efficiency. For example, many mobile devices today can be multi-use. The same equipment—perhaps loaded with different applications—can be used across multiple workflows in multiple business units. That simplifies and streamlines deployment and support. There may be volume discounts to be had in purchasing. A piecemeal approach often creates unnecessary expense and complexity that exacerbates IT burnout.

High-level and centralized decision-making on mobile solutions ties IT closer together with broad business strategy and goals. You get better buy-in for proactive planning, management, support, and the forecasting of future needs. Our research found that organizations with centralized decision-making are reaping a host of significant benefits (see Figure 4.5).

Challenges are Many

The 2023 Enterprise Mobility Outlook shows that IT leaders and their teams juggle more now than they've ever had to, and the task is growing. Whether decision-making is centralized or not, companies often lack the internal expertise and resources to adequately manage all the mobile solutions they're now expected to design, deploy, and support at scale.



How are Enterprises Teaming with Managed Mobile Services Providers to Conquer their Challenges?

When Companies Don't Have Enough Resources, They Turn to Experts

The good news for overtaxed IT teams is help is available. Our research found that the overwhelming majority of companies have turned to partners like a Managed Mobile Service Provider (MMSP) to get the expertise and scale they need for efficient, reliable, and cost-effective mobile device solutions. Only a quarter are getting by with just internal resources (see Figure 5.1).

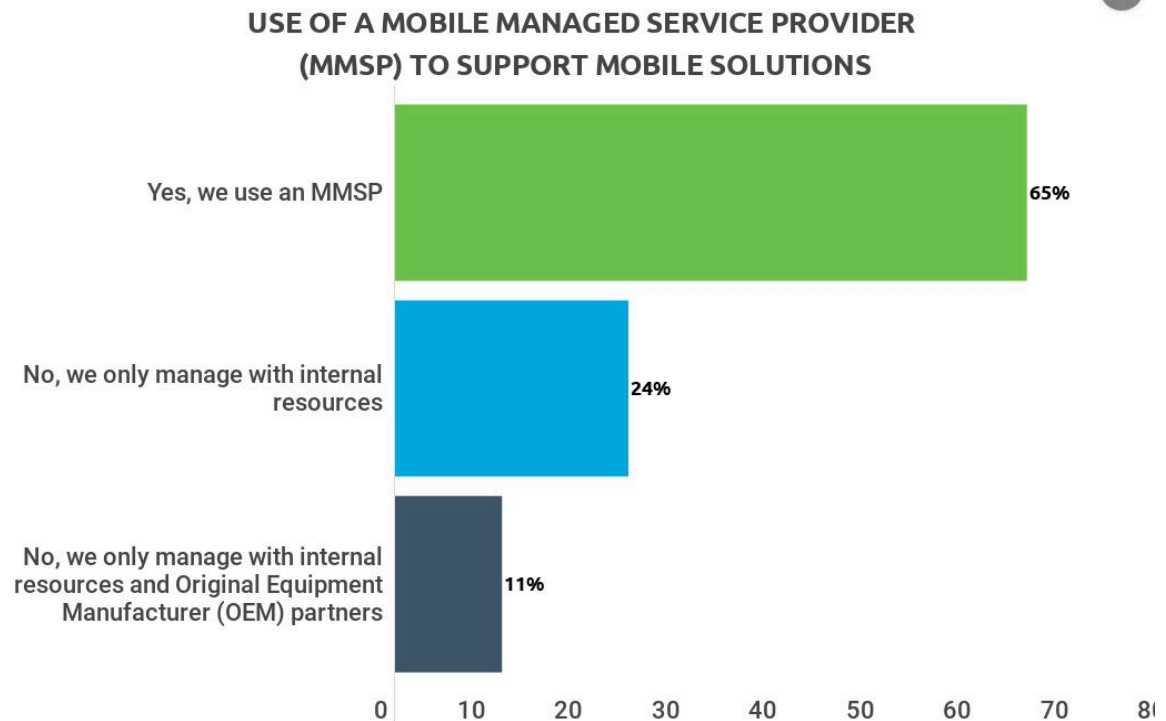


65% of enterprises use an MMSP to get the expertise and scale they need for efficient, reliable, and cost-effective mobile device solutions

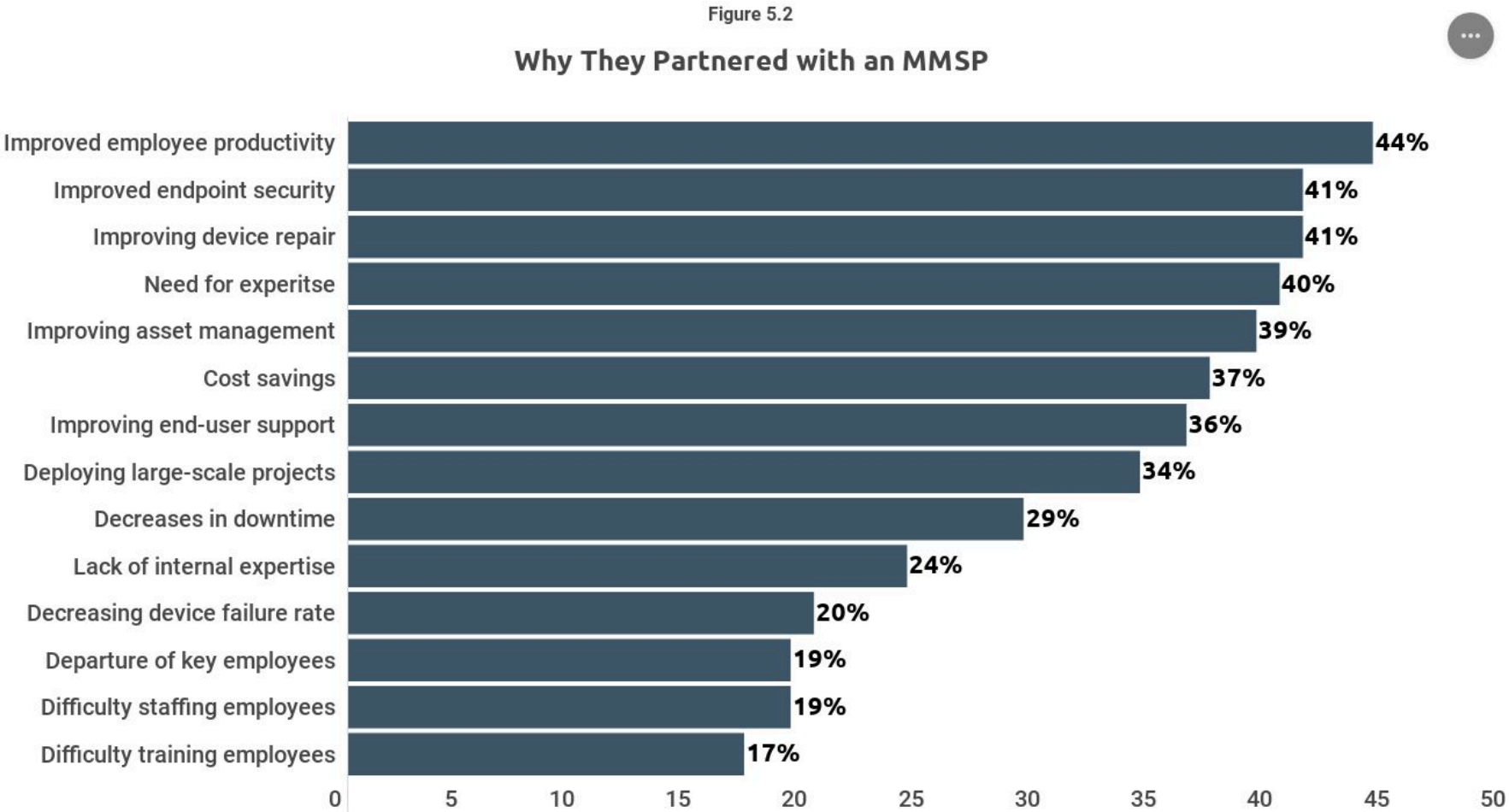
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Figure 5.1



We asked respondents who are partnering with an MMSP why they do and found improving productivity, endpoint security, device repair, and the need for expertise topped the list (see Figure 5.2).



For companies trying to decide whether to do things in-house or partner with an MMSP, our research found a wide range of motivations for reaching out for help. Improvements to asset management, security, and support topped the list (see Figure 5.3).

Figure 5.3

Top 5 Reasons for Considering New MMSP Partnership	
#1	Improving Asset Management
#2	Improving Endpoint Security
#3	Better User Support
#4	Better Device Repair
#5	Improving Employee Productivity



It's clear from the results that enterprise leaders are looking at MMSP partnerships to help them tackle the challenges of managing the sheer number of devices they're using now. Most say they struggle to keep track of everything, ensure there are no security holes, and provide enough end-user support.

For those partnering with an MMSP, 78 percent said it's been either very, or extremely, helpful with burnout, and 82 percent said it's been either very, or extremely, helpful with the lack of leadership direction.

78% of IT leaders say their MMSP is very, or extremely, helpful with IT burnout.

82% of respondents say their MMSP is very, or extremely, helpful with the lack of leadership direction

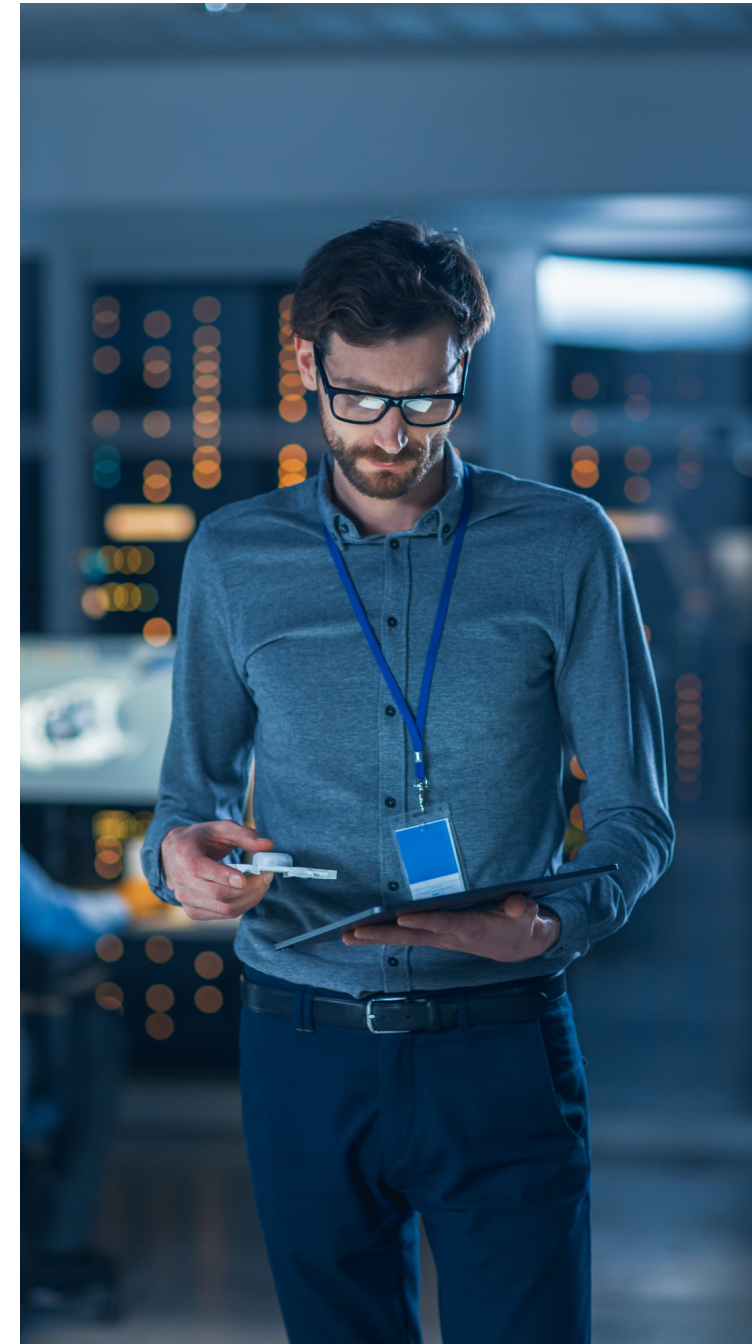
2023 Enterprise Mobility Outlook Report

How to Deal with IT Team Burnout

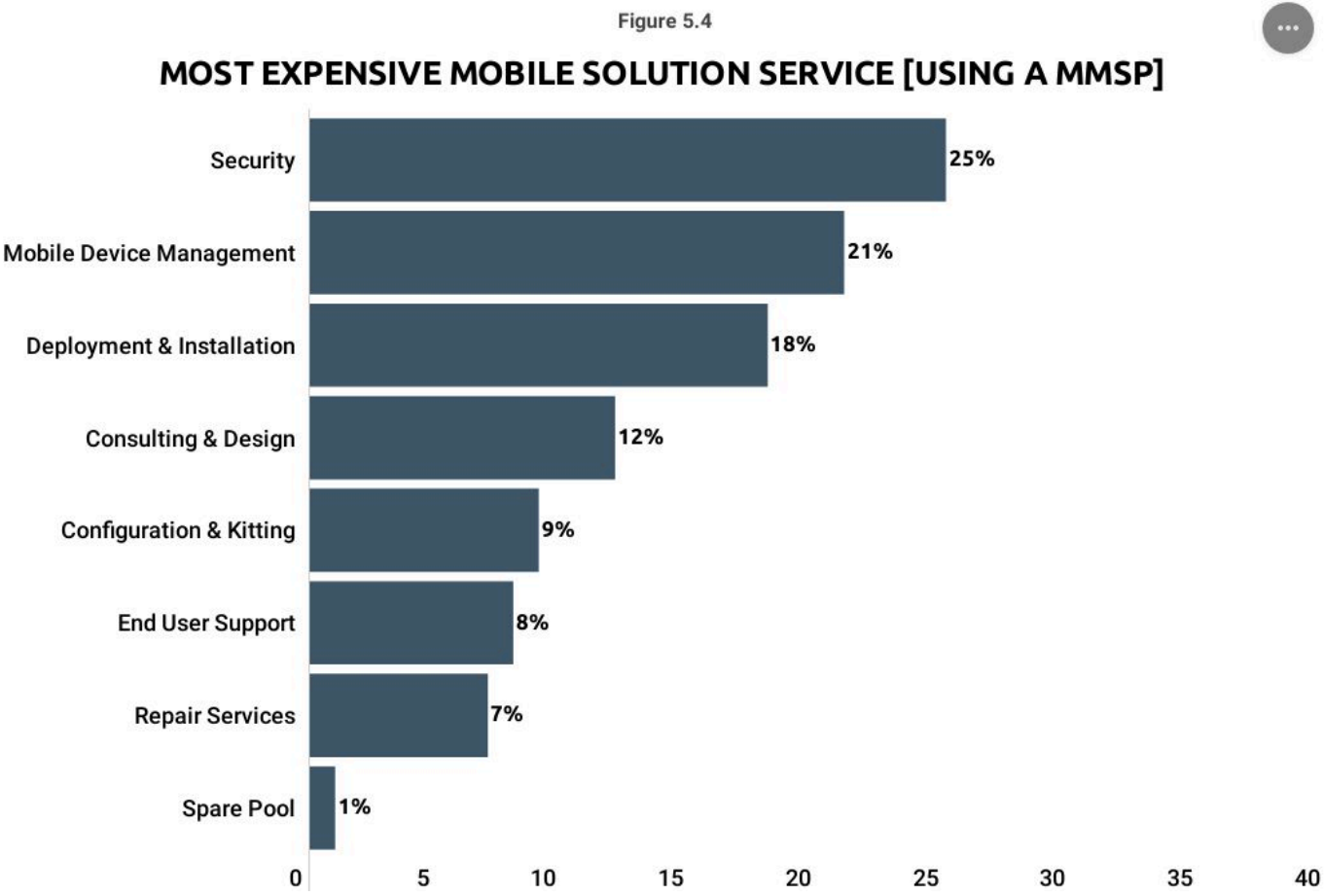
Stratix's Ross Homans digs into the causes of IT team burnout and has some suggestions for what you can do about it.



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We also asked respondents to rank their costs associated with mobile. Security, mobile device management, and deployment topped the list (see Figure 5.4).



Tips for Securing Mobile Devices in an Enterprise Environment

Endpoint management is complex, and there are a lot of choices and decisions to make when choosing the right solution for your organization. Here are four tips to take on the challenge.

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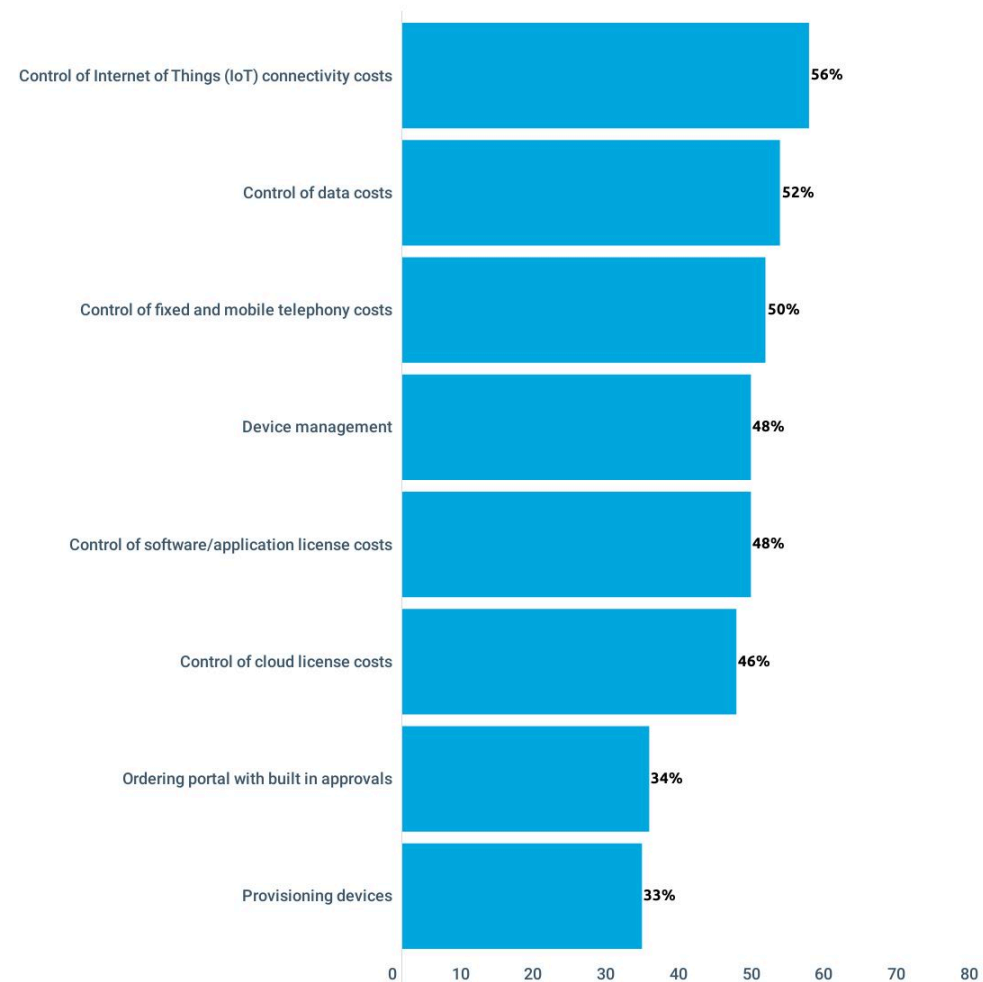
Recurring costs associated with mobile are another top area of focus for enterprises. Once a mobile solution is deployed, there are ongoing expenses like software licenses and data plans from carriers. Those charges quickly add up. Our research found that 55% of companies currently use a Telecom Expense Management provider to keep that spending under control. Digging into the numbers, the most popular services from those providers are managing IoT, data, and telephony costs (see Figure 5.5).

MMSPs Help Enterprises Tackle Their Challenges

It's clear from the 2023 Enterprise Mobility Outlook data that while IT teams are feeling overwhelmed by the amount of technology they're managing, they are getting significant and effective help from MMSPs. That's expected to continue as the use of mobile expands, and emerging technology opens up even more use cases.

Figure 5.5

SERVICES PROVIDED BY TELECOM OR TECHNOLOGY EXPENSE MANAGEMENT PARTNER(S)



Conclusions

Mobile is Critical to Enterprise Success

Many examples from the pandemic demonstrate how mobile helps enterprises conquer disruption and uncertainty. Retailers with mobile devices were able to pivot to curbside pickup faster. Mobility was vital to enabling work from anywhere. With 97 percent of companies now saying mobile is very, or extremely, important to business, the 2023 Enterprise Mobility Outlook shows it's a lesson that's been well learned. Mobile is helping companies get where they need to be to weather uncertain times. Only a tiny percentage aren't focused on leveraging mobile to improve their nimbleness through:

- Automation
- Streamlining workflows
- Having the ability to scale up or down quickly
- Gaining tools that easily evolve as organizational needs and priorities change
- Improving ROI with multi-use devices

Enterprise leaders will invest more in mobile during economic uncertainty to achieve necessary efficiencies and cost savings which drive competitiveness. From tablets to smartphones, wearables to IoT, they are looking for every advantage they can squeeze from technology.

Challenges to Overcome

With enterprises doubling down on mobile to reap the benefits, 75 percent of IT leaders and their teams are feeling overwhelmed by the size and diversity of the tech stacks they're now managing. It's introducing new business risks when deployments aren't done quickly, correctly, and with adequate support. Issues like endpoint security and keeping track of the status of devices are concerns that repeatedly stand out in our research. The majority can't see their entire mobile from a single pane of glass—which unnecessarily increases the



complexity of the job they do. Companies often lack the expertise and resources internally to adequately manage all the mobile solutions they're now expected to design, deploy, and support at scale.

MMSPs to the Rescue

Enterprise leaders realize that everyone has mobile technology, but the winners are those who deploy it best. Factors like cost, quality of solutions, frictionless deployments, and strong support are very important. To solve their challenges, most enterprises partner with an MMSP to wring every advantage possible out of their technology investments.

The Use of Mobile Will Keep Expanding

Developing technology like wearables and IoT is creating more and more use cases where mobile can improve workflows, enhance user experiences, and generate actionable data. Advanced 5G and private 5G networks will help speed that expansion. The majority of respondents say that will impact IT strategies and mandate comprehensive endpoint management solutions. It will be critical to find ways to reduce the complexity while adding even more new solutions to tech stacks.

About Stratix

Wherever your organization is in its mobile-first journey, you don't have to go it alone. Stratix has led from the front on mobility for four decades. We can help you design and deliver end-to-end mobile technology solutions that make your organization's mobility convenient, easy, and cost-effective. We execute deployments at scale and with precision so they work in the hands of your end users out of the box. Once devices are in service, we provide ongoing world-class managed services and visibility tools that ensure nonstop mobility throughout their lifecycle. For additional information, visit www.stratixcorp.com



About Hanover Research

Founded in 2003, Hanover Research is a global research and analytics firm that delivers market intelligence through a unique, fixed-fee model to more than 1,000 clients. Headquartered in Arlington, Virginia, Hanover employs high-caliber market researchers, analysts, and account executives to provide a service that is revolutionary in its combination of flexibility and affordability. Hanover was named a Top 50 Market Research Firm by the American Marketing Association in 2015, 2016, 2017, 2018, and by the Insights Association in 2019. To learn more about Hanover Research, visit www.hanoverresearch.com.



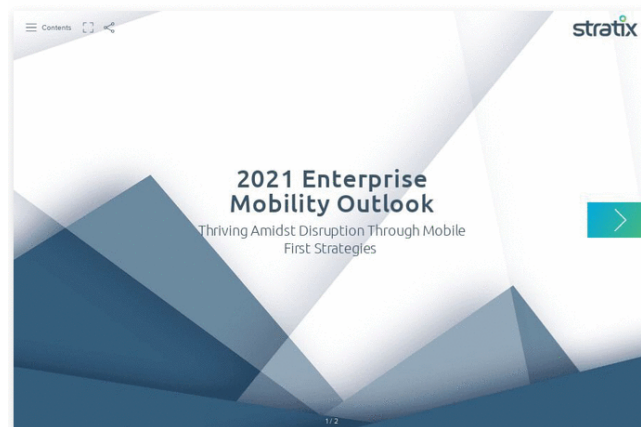
Enterprise Mobility Reports

Fourth Year for the Enterprise Mobility Report Shows Companies are Leveraging Mobile Technology to Succeed in Uncertain Times



2022

Our 2022 Outlook and Mobile-First Score, we saw who's leveraging mobile for digital transformation, how they're doing it, the challenges, and what they needed to do to improve.



2021

Our second study in 2021 gave us a report card on how organizations were responding to the pandemic and who was best equipped.



2020

Our first Enterprise Mobility Outlook—done just before the pandemic outbreak—showed how early technology adopters were leading the way on overall revenue.

Thank you for reading the

2023 Enterprise Mobility Outlook

Don't let uncertainty hold your company back. Contact us to speak with one of our enterprise mobility specialists and learn how mobile technology can drive success for your business.