

451

Research®

BLACK & WHITE PAPER

# Mobile-First Communications Drive Productivity Gains for the Connected Workforce

COMMISSIONED BY



**NetSfere**  
Enabling Communication.

SEPTEMBER 2019

©COPYRIGHT 2019 451 RESEARCH.  
ALL RIGHTS RESERVED.

# About this paper

A Black & White paper is a study based on primary research survey data that assesses the market dynamics of a key enterprise technology segment through the lens of the “on the ground” experience and opinions of real practitioners — what they are doing, and why they are doing it.

## ABOUT THE AUTHOR



### **RAUL CASTANON-MARTINEZ**

SENIOR ANALYST, WORKFORCE  
COLLABORATION AND COMMUNICATIONS

Raúl Castañón-Martínez is a senior analyst based in Boston focusing on business communications and collaboration technologies such as enterprise messaging, voice, bots, speech recognition and unified communications. Before 451 Research, he was a product manager at EMOSpeech, analyzing emotion recognition technology. At Comverse Network Systems, he gained significant experience in product marketing working with tier one mobile operators to define strategy, pricing and business models for voice and data products. Raúl is widely quoted in the top tier press including publications like CIO, Computer World, Fortune and Wired.

# Introduction

Mobile communications and messaging have become the norm for the modern workforce. A majority of employees are relying primarily on smartphones to communicate with each other and with their clients, partners and suppliers. They also rely heavily on messaging for personal and business communications.

There are several reasons for this, including the influence of Millennials in the workplace. Also known as Generation Y, Millennials (i.e., the demographic group born between the early 1980s and the 1990s) are the first generation of digital-native employees. According to the Bureau of Labor Statistics, as of 2015, Millennials became the largest generation in the American workforce. Combined with other major trends including consumer-driven mobility, flexible work arrangements, and businesses constructing digital transformation initiatives as they look for more operational agility, these factors paint a much different picture when it comes to workplace collaboration than ten or even five years ago.

To better understand the dynamics and opportunities regarding the role that mobility and messaging play in the modern work environment, we surveyed IT decision-makers and employees about the current state of mobility in their organizations and its impact on productivity. This paper examines those responses to look at both the challenges and opportunities they face with respect to the role that mobility plays for enabling an agile working environment.

Our research shows that the relevance of mobility and messaging goes beyond technology adoption. While the influence of digital-native employees regarding technology is relevant in itself, survey data indicates that mobility and messaging can have a significant impact on an organization's ability to execute, enabling better collaboration and increasing productivity. Nearly one out of two employees believe they stand to gain six or more hours per week as a direct result of using their smartphones for messaging and collaboration; this translates into productivity gains of more than 15%. Research findings clearly show that businesses see mobile communications as a key component of their strategy to drive improved productivity across their workforce.

## Key Findings – Employees

- **Employees rely heavily on smartphones and messaging for business communications.** A majority of respondents use their smartphones several times a day – more than their laptop or desktop computers. Messaging is one of the top applications for smartphone users.
- **The use of smartphones for business communications is higher among younger employees.** Mobile messaging is the preferred way to communicate for Millennials, but they are early adopters. This trend is extending to employees across all age groups.
- **Mobile communications can have a significant impact on employee productivity.** One out of two employees believe they stand to gain six or more hours per week as a direct result of their use of mobile messaging.

**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

- **Mobile-first is key for user adoption.** Employees show a strong preference for mobile-optimized applications. Conversely, the use of applications that are not mobile-first – including team collaboration and unified communications – tend to be significantly lower in comparison.

## Key Findings – IT Decision-Makers

- **Security and productivity are key priorities for IT decision-makers when it comes to business communications.** Organizations that are on the leading edge when it comes to technology adoption are investing in mobile communications to support the secure flow of critical business data into conversations to aid decision-making.
- **It is imperative for business communications to be mobile-first, messaging-first.** Four out of five (80%) respondents in our IT decision-maker survey consider it ‘very important’ that their messaging tools be optimized for mobile-specific working.
- **Video communications is emerging as a key capability.** Video was cited by IT decision-makers as the top desired feature for mobile communications.

## Methodology

451 Research conducted two custom surveys targeting a representative sample of IT decision-makers and employees in large enterprises across a range of industries in North America and Europe. All of the decision-maker survey respondents are senior IT leaders in their organizations and possess intimate knowledge of their companies’ technologies and processes. We also asked end users about the devices and productivity and collaboration technologies they use on a regular basis, the impact these have in helping them get their work done and the pain points they experience.

# Mobile, Messaging and Flexible Working Are the Norm in the Modern Workplace

Demographic changes and flexible work arrangements are influencing a major shift in the workplace. Results from our employee survey show that the modern work environment is increasingly flexible and mobile. For a majority of respondents, nontraditional work arrangements – including flexible working hours and remote work – is now ‘business as usual.’

- Four out of five respondents (79%) work in organizations that allow flexible work hours (Figure 1).
- An additional 9% of respondents work in organizations that do not allow flexible work hours but stated they would like to have that option (Figure 1).
- Employees aged 40-49 are more likely to work flexible hours than other age groups (Figure 2).
- Two out of three respondents (64%) report that their organizations allow employees to work from home (Figure 3).

**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

Figure 1: Companies are embracing flexible hours for employees

Source: 451 Research

Q: Does your organization allow you to work flexible hours (i.e., nontraditional hours/flextime)?

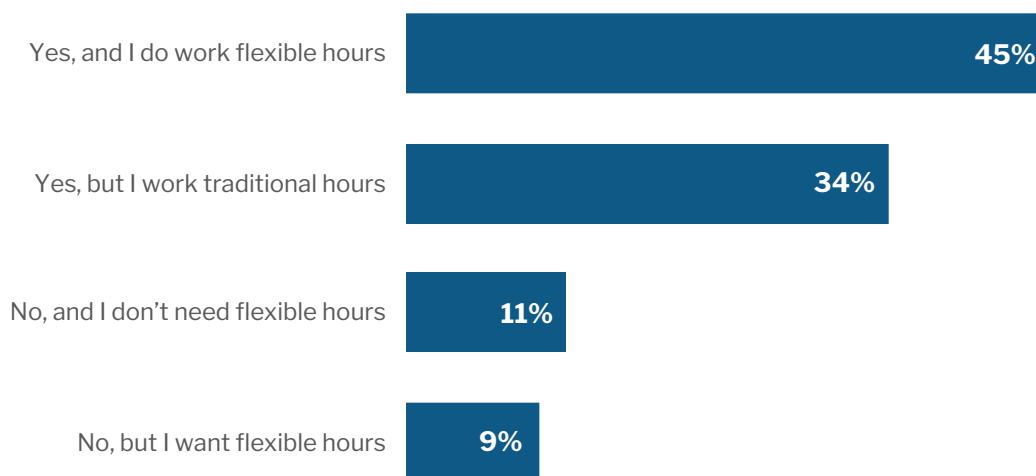
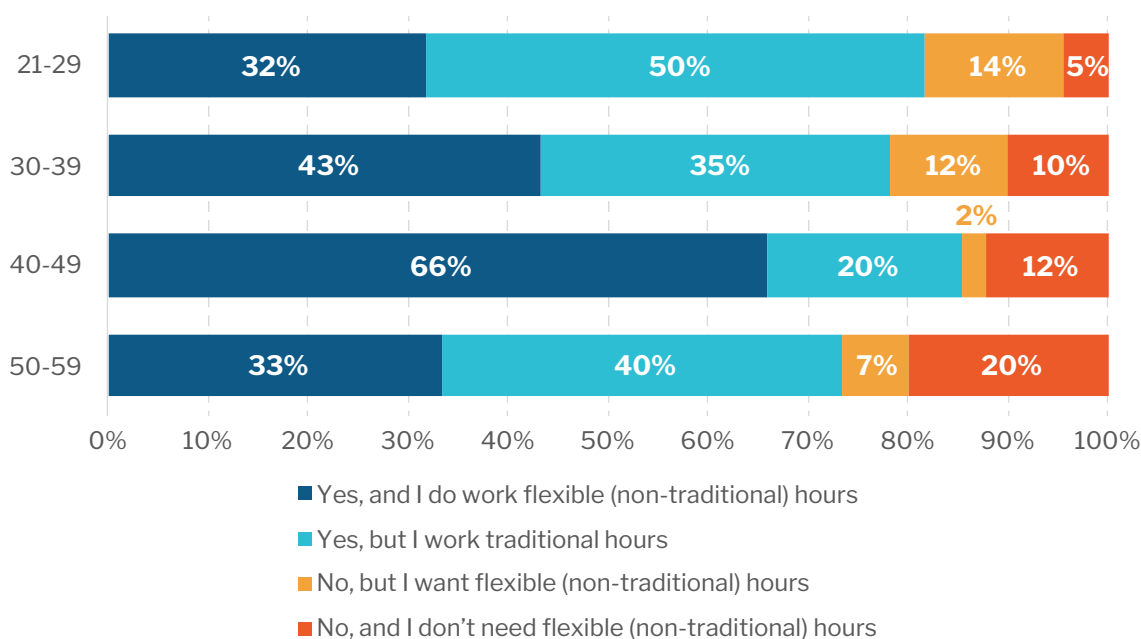


Figure 2: Generation X employees are more likely to work flexible hours

Source: 451 Research

Q: Does your organization allow you to work flexible hours (i.e., nontraditional hours/flextime)?



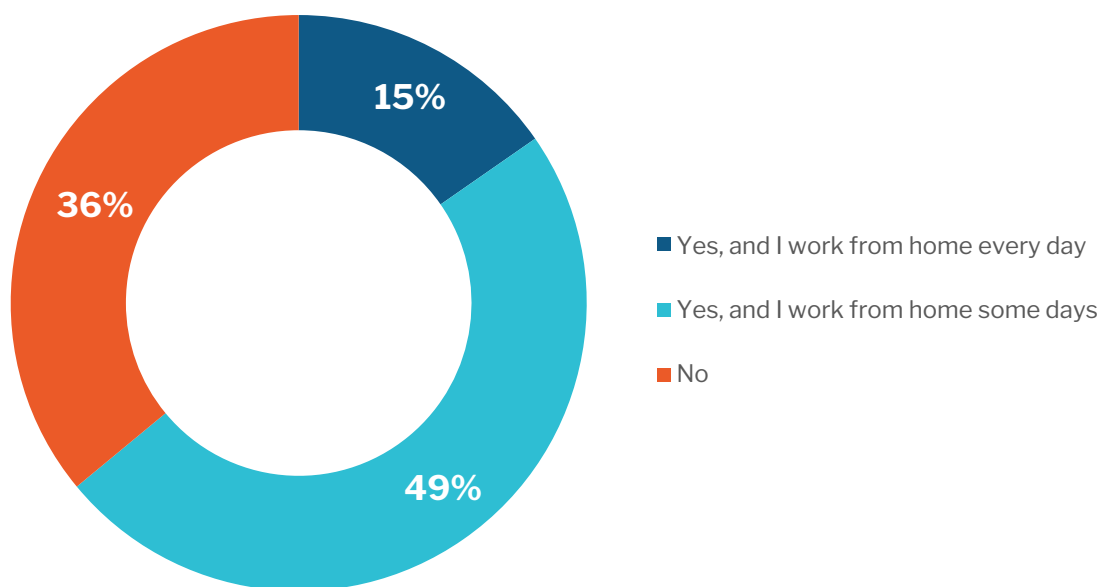
In addition to flexible hours for employees, companies are also embracing flexible work arrangements, including working from home. More than half of surveyed employees (64%) stated their organizations allow them to work from home. Survey results also show that employees are taking advantage of these policies to be more effective and productive. One out of two respondents (49%) will work from home some days, while an additional 15% do so every day (Figure 3).

**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

Figure 3: Flexible work arrangements are the norm in the modern workplace

Source: 451 Research

Q: Does your organization allow you to work from home?



### Flexible Work Arrangements and BYOD Policies

Enabling flexible working arrangements is leading organizations to evaluate the productivity and collaboration technologies used by their employees, including bring-your-own-device (BYOD) policies. Our research shows that organizations are open to providing flexibility in the use of personal devices in the workplace. Two out of three respondents (66%) report their employers allow flexibility in the use of personal devices (Figure 4), with smartphones listed as the most commonly used personal device in the workplace (Figure 5).



Figure 4: Most organizations are open to providing flexibility in the use of personal devices by employees

Source: 451 Research

Q: Which of the following best describes your organization's policy on the use of employees' personal devices for business purposes (i.e., BYOD)?

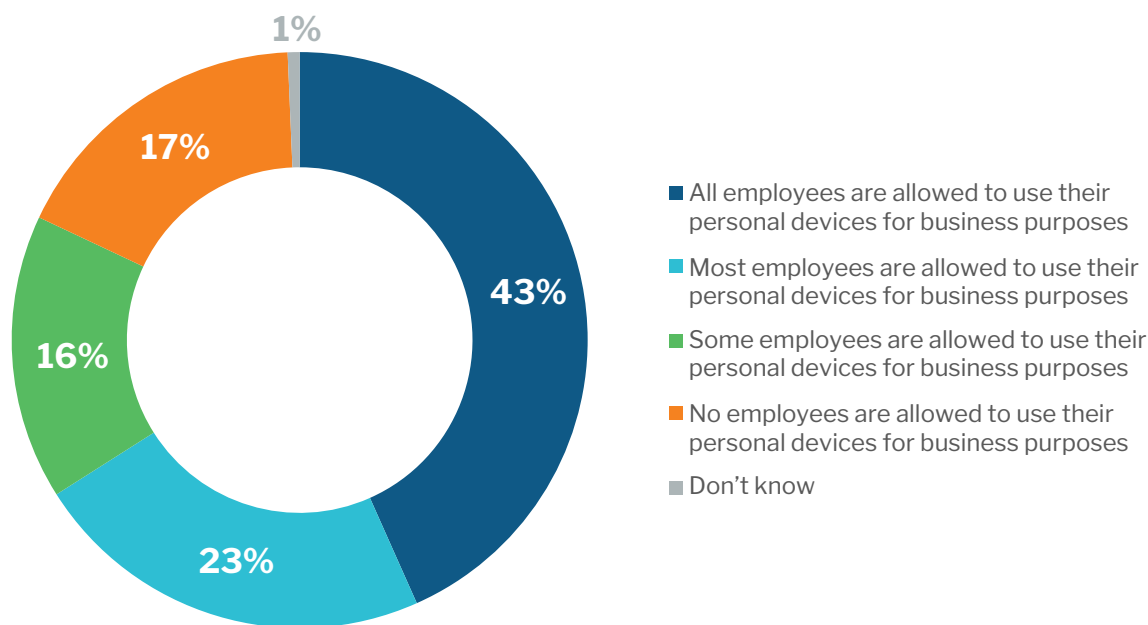
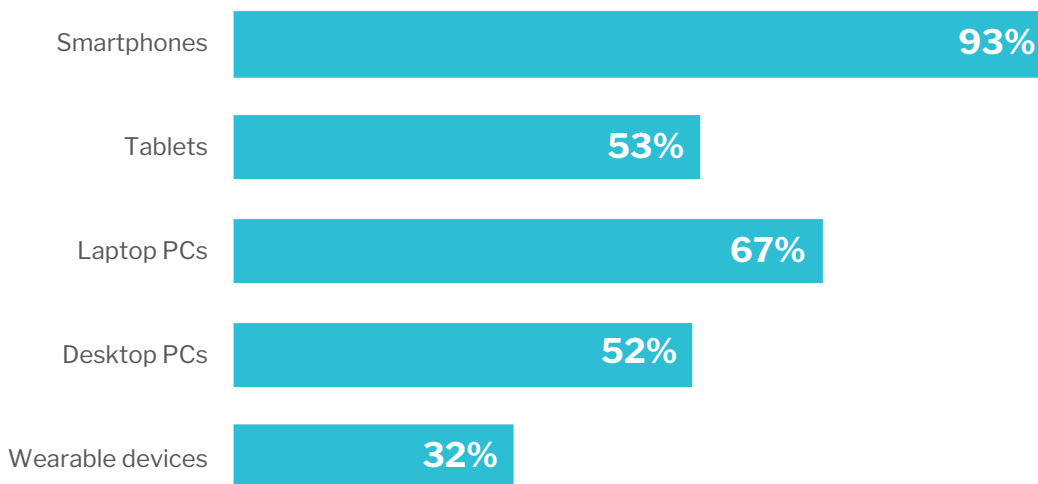


Figure 5: Smartphones are the most commonly used personal device in the workplace

Source: 451 Research

Q: Which of their personal devices are your organization's employees allowed to use for business purposes?



**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

## Business Communications Are Now Mobile-First

The growing relevance of mobile devices for business communications is undeniable. Nowadays, employees are relying primarily on smartphones to communicate and collaborate with each other and with clients, partners and suppliers. As previously noted, there are several reasons for this, including the influence of consumer-driven mobility and flexible work arrangements.

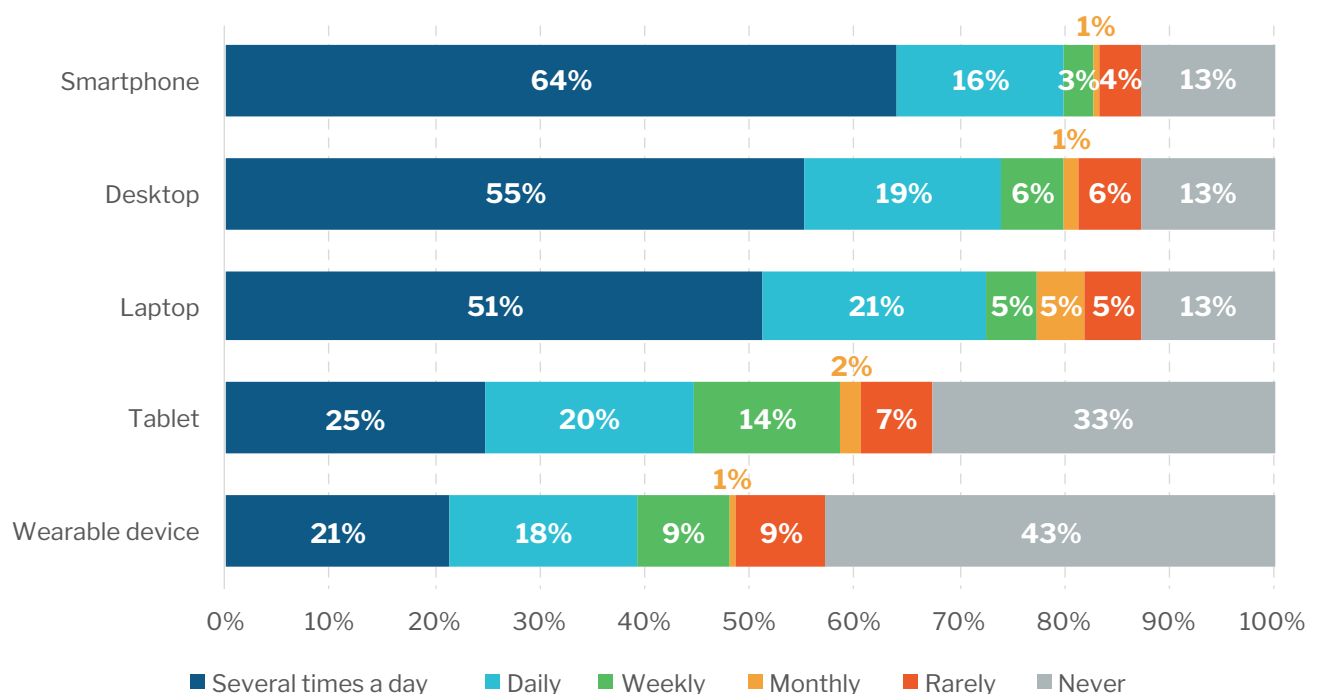
Our research shows that smartphones have become a key way for employees to get work done:

- Employee survey results show that a majority of respondents (80%) use their smartphones for business purposes on a daily basis (Figure 6).
- The use of smartphones for business purposes is prevalent among all age groups under 49 but is particularly notable for employees aged 21-29 (Figure 7).

Figure 6: Employees rely heavily on smartphones for business communications

Source: 451 Research

Q: Which of these devices do you use for business purposes, and how frequently?



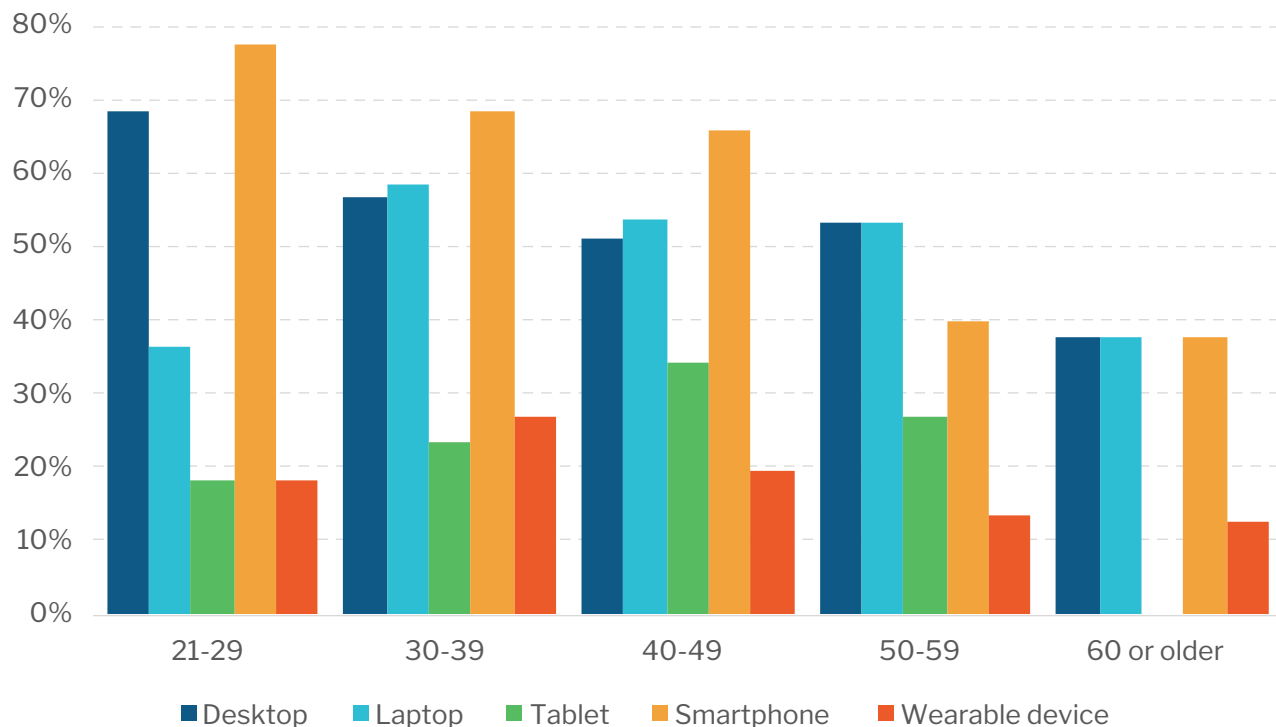
**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE



Figure 7: The use of smartphones for business communications is higher among younger employees

Source: 451 Research

Q: Which of these devices do you use for business purposes, and how frequently? A: Several times a day.



Our research also shows significant differences in how employees use their devices. While content creation (e.g., MS Office and Google Docs) and file sharing (e.g., SharePoint, Dropbox, Box) are the top tools employees find most helpful for getting their work done (Figure 8), when it comes mobile devices, the top applications are typically communication and scheduling apps (e.g., email, calendar and messaging), as seen in Figure 9.

**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

Figure 8: Email, messaging and content creation are the top tools for employees

Source: 451 Research

Q: Which of the following tools do you find most helpful in getting your work done?

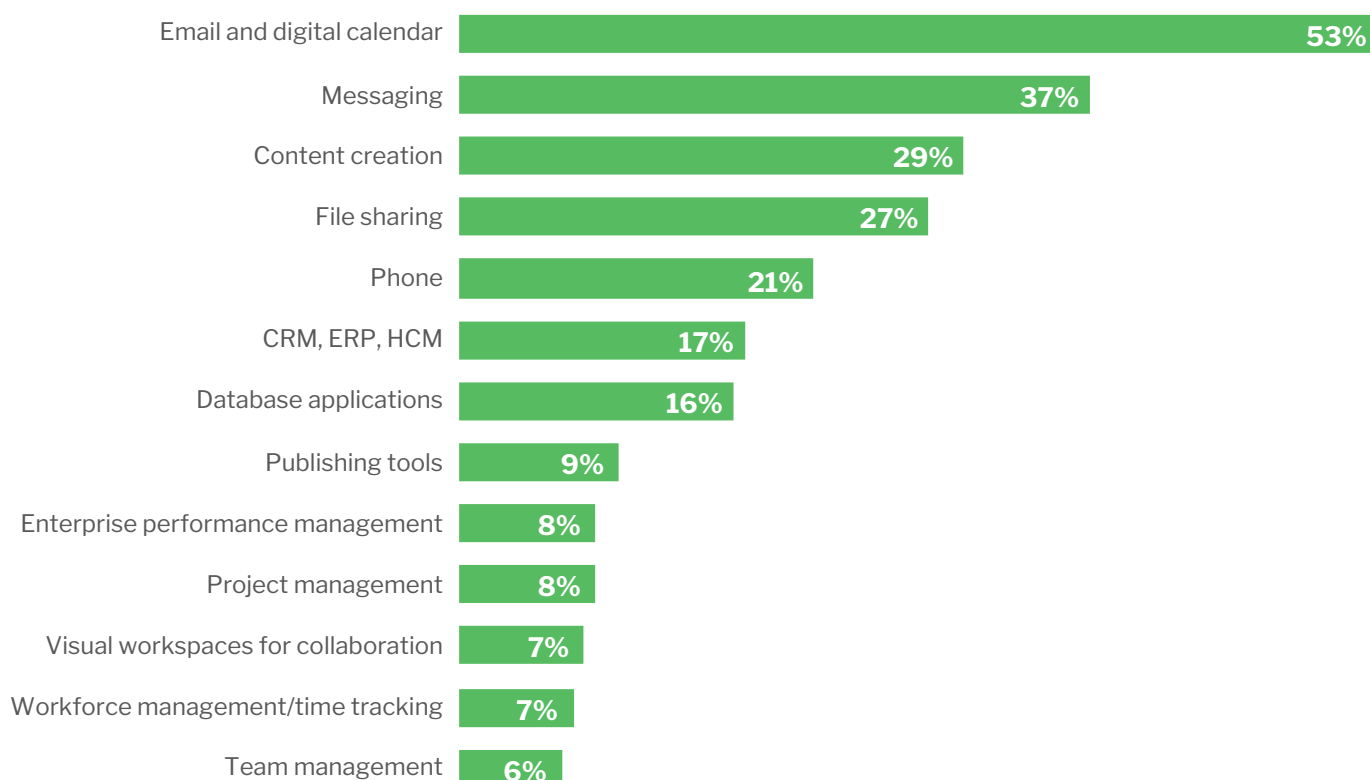
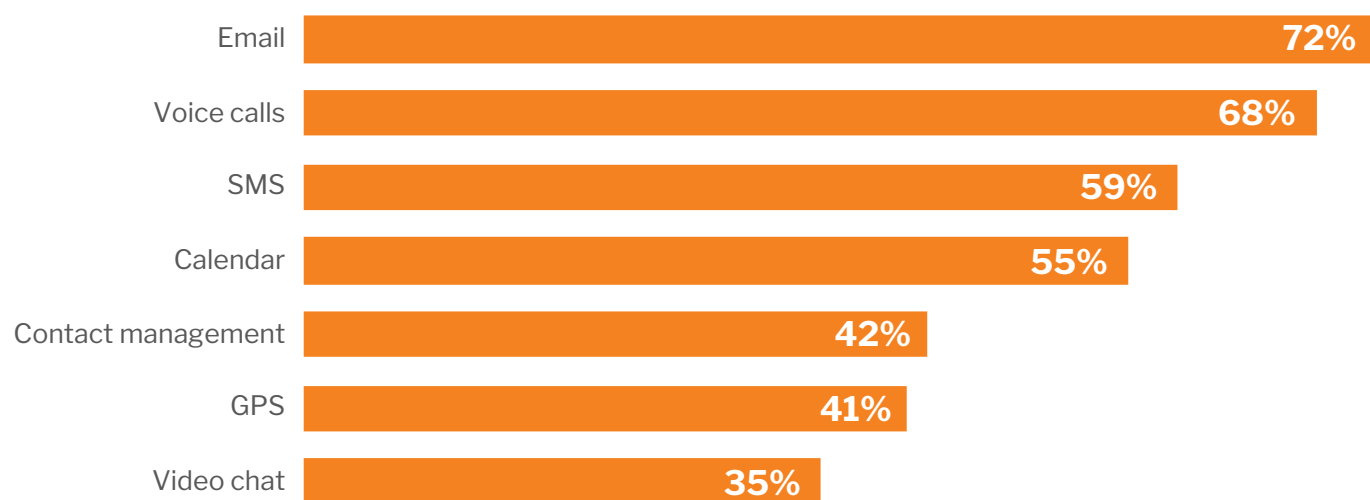


Figure 9: Communication and productivity are the top applications for smartphone users

Source: 451 Research

Q: How important are the following for your personal productivity?



**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

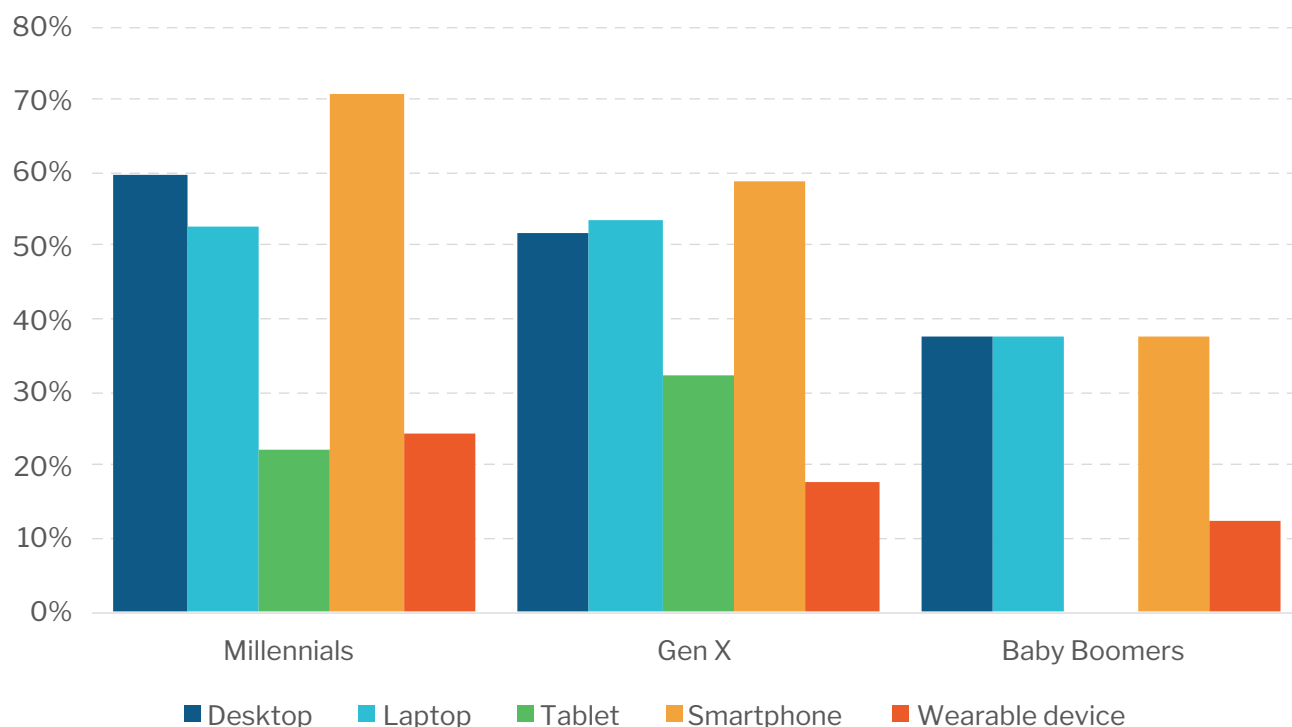
# Usage Trends by Age Group

Survey results show that while smartphone use is prevalent among all age groups, the two age groups that roughly correspond to the Millennial generation (in our study, those that are 21-39 years of age) show a higher use of smartphones for business purposes, as shown in Figure 10.

Figure 10: Millennials are heavy users of smartphones and mobile applications

Source: 451 Research

Q: Which of these devices do you use for business purposes, and how frequently?



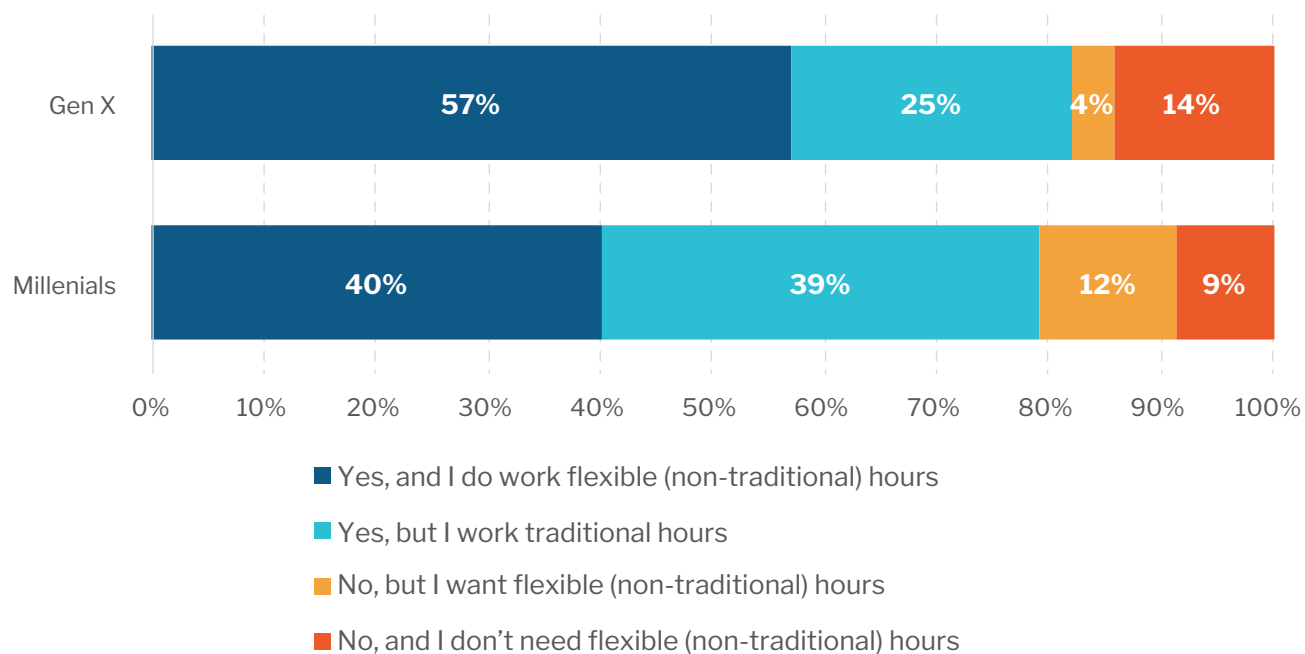
When it comes to flexible work arrangements, survey results show that the age groups that correspond to Generation X (in our study, those that are 40-54 years of age) are more likely to work flexible hours. More than half (57%) of Gen X employees report working flexible hours, compared to 40% of Millennials.

**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

Figure 11: Gen X employees are more likely to work flexible (nontraditional) hours

Source: 451 Research

Q: Does your organization allow you to work flexible hours (i.e., nontraditional hours/flextime)?



# Enabling a Secure, Flexible Work Environment is a Priority for IT Decision-Makers

Organizations are looking to tackle the challenges involved in enabling a secure, agile working environment. Our research shows that IT decision-makers are looking to support changing workstyles and a growing mobile workforce by enabling new types of digital workspaces that allow them to stay connected securely in distributed locations.

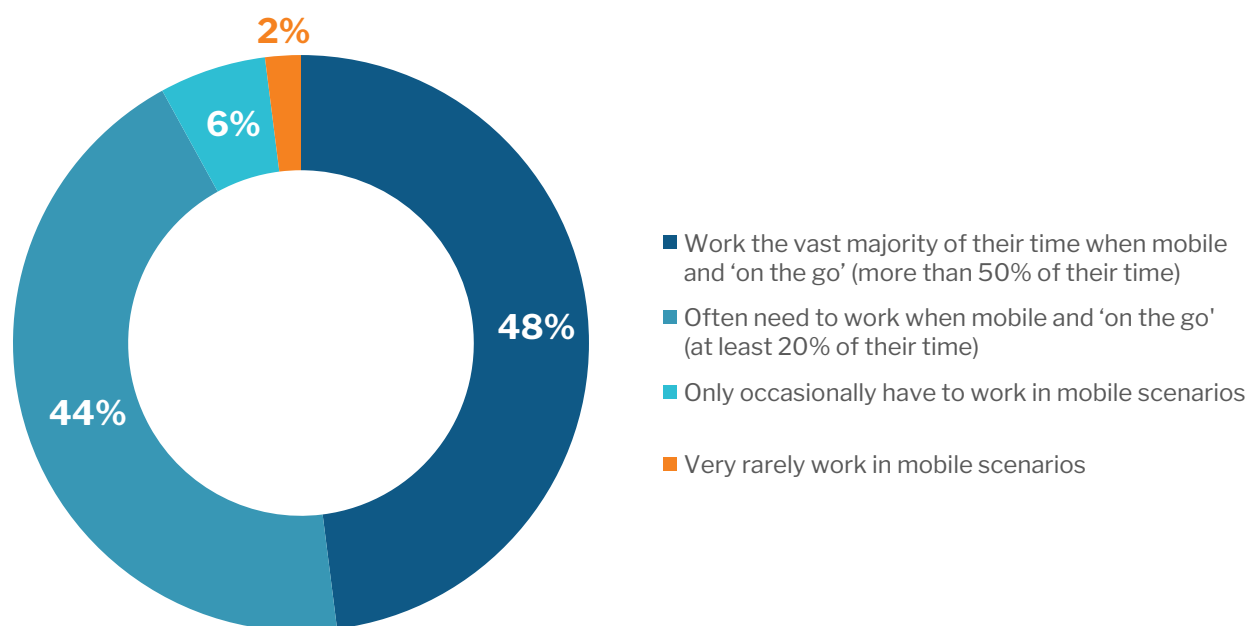
Survey results show that IT decision-makers are not only aware of how the modern work environment is evolving, but they are taking the necessary steps to adjust their policies and technologies accordingly:

- A majority (71%) of respondents in our IT decision-maker survey consider their organizations to be early adopters when it comes to technology adoption.
- Nearly half support a significant number of employees that constantly travel or work remotely (Figure 12).
- The ability to communicate in real time while traveling or working remotely was cited as a key capability for deploying mobile messaging tools for employees.
- For most IT decision-makers, security is at the top of the list when it comes to evaluating messaging/team collaboration platforms, followed by scalability and productivity (Figure 13).

Figure 12: IT organizations support a significant number of employees that constantly travel or work remotely

Source: 451 Research

Q: What proportion of your employees using your messaging/team collaboration tool fall under the following scenarios (mobile and 'on the go' includes traveling for work, flexible work arrangements and work from home and field workers)?

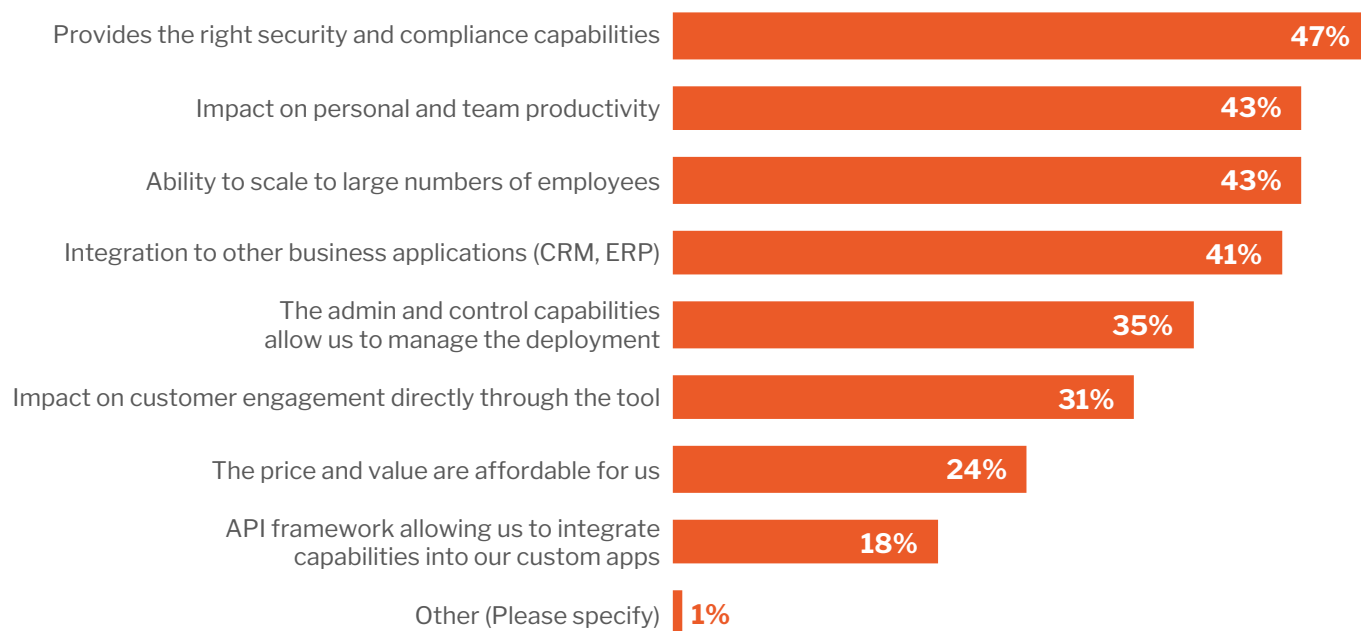


**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

Figure 13: Security, scalability and productivity are the top priorities for IT decision-makers

Source: 451 Research

Q: Which of the following capabilities were most important in your decision to use your company's messaging/team collaboration platform?



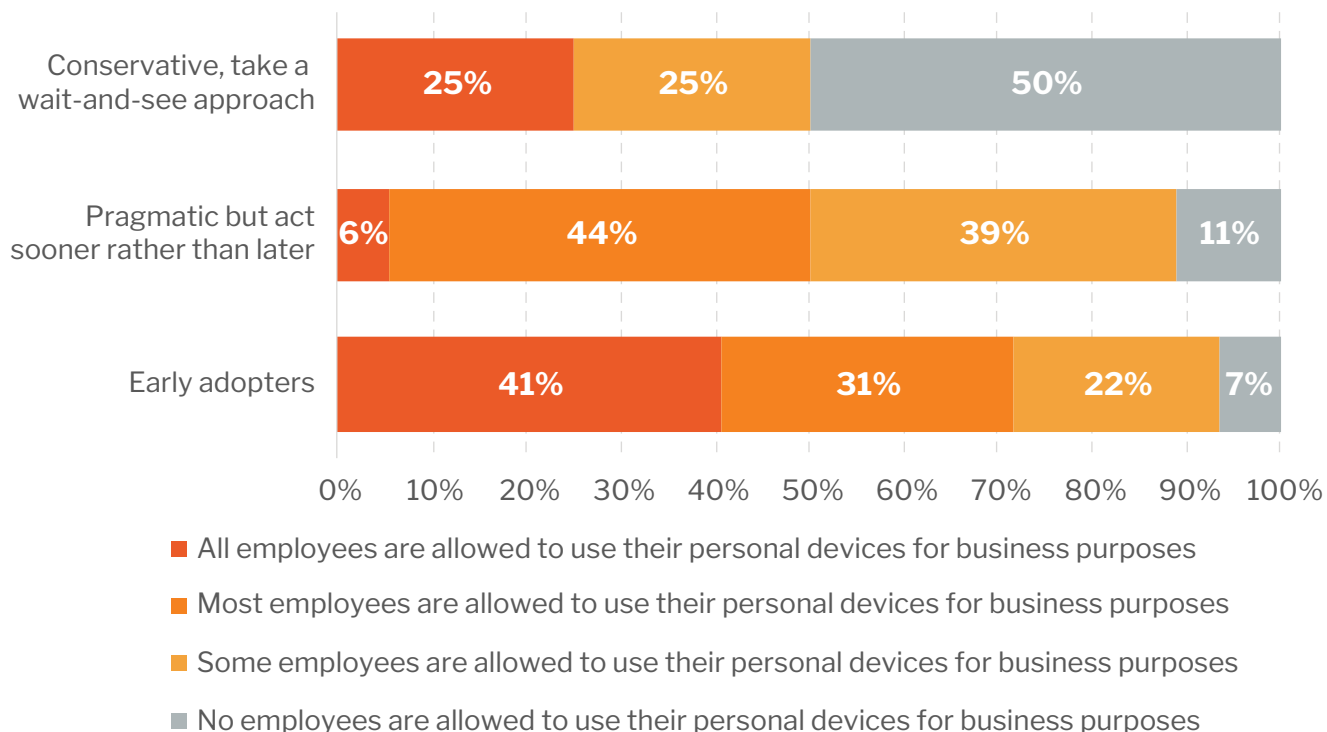
## Early Adopters Tend to be Mobile-First and Messaging-First

Survey results show that companies that are early adopters when it comes to technology are significantly more likely to allow the use of personal devices for business purposes, as seen in Figure 14.

Figure 14: Early adopters are more likely to embrace BYOD policies

Source: 451 Research

Q: Which of the following best describes your organization's policy regarding the use of employees' personal devices – including smartphones, tablets, laptops, PCs and wearable devices – for business purposes (i.e., BYOD)?



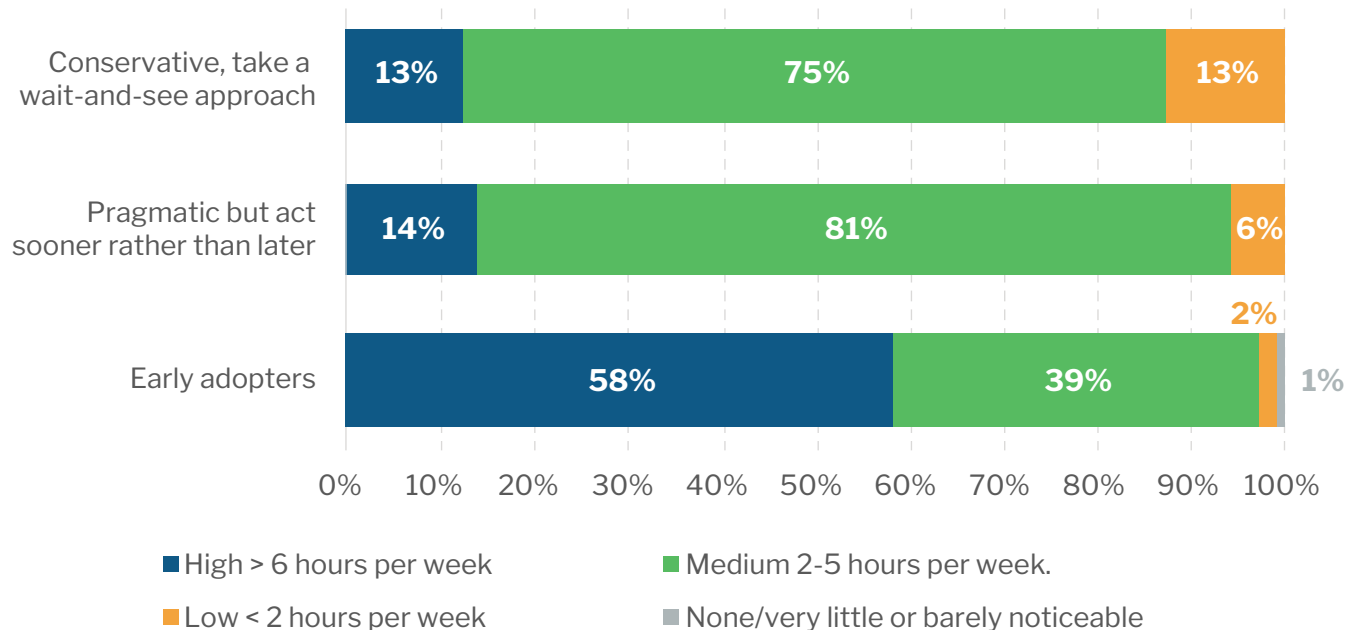
IT decision-makers from organizations that tend to be on the leading edge when it comes to technology adoption are significantly more likely to identify high productivity gains from mobile messaging. More than half of early adopters (58%) believe employees gain more than six hours per week, compared to only 14% for pragmatic and 13% for conservatives, as seen in Figure 15.



Figure 15: Early adopters believe mobile messaging can have a significant impact on employee productivity

Source: 451 Research

Q: What kind of productivity gains do your employees get from messaging/team collaboration?



## Video is Emerging as a Key Capability for Mobile Communications

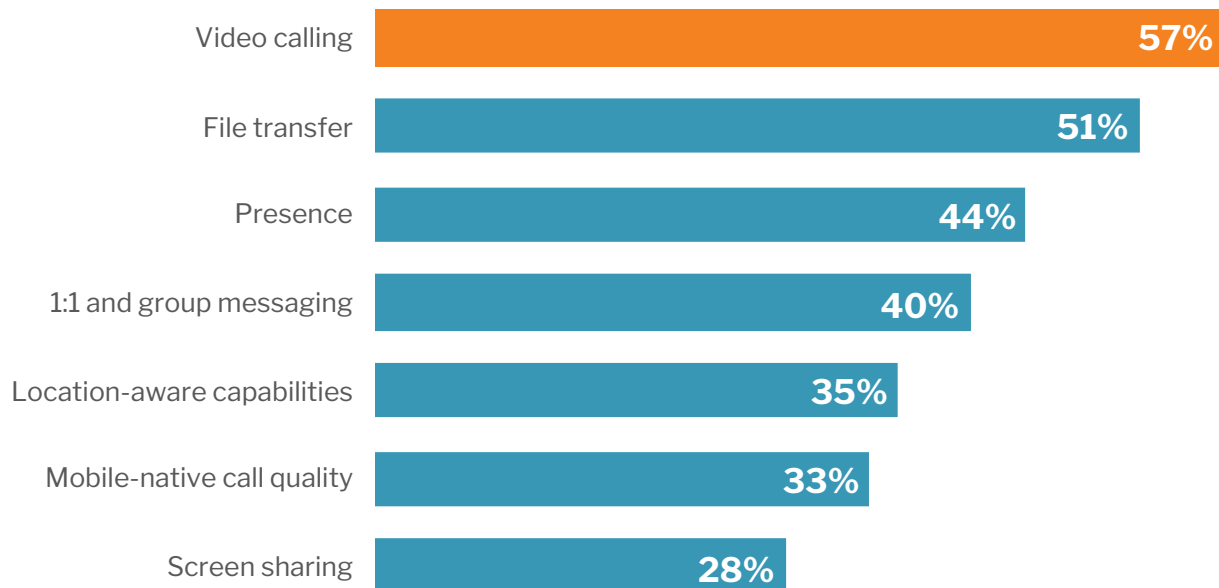
Our research shows that for IT decision-makers in organizations that are on the leading edge when it comes to technology adoption, video is the top priority when it comes to mobile communications, followed by file transfer, presence and messaging, as seen in Figure 16.

**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

Figure 16: Video communications is a key capability for mobile communications

Source: 451 Research

Q: Specifically thinking about mobile capabilities, which three are most important to your organization?



**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

# The Challenge for IT: Enabling Better Collaboration and Increasing Productivity

As previously noted, more employees than ever rely on mobile devices and collaboration technologies to do their work and communicate with their colleagues. Our research shows that a connected, mobile workforce is now the norm in the modern work environment. Survey results also show that organizations are stepping up to the plate and supporting employees with BYOD policies and flexible work arrangements. However, drilling down further reveals several challenges and potential pitfalls for organizations that are looking to support a distributed work environment and provide employees with secure access to business applications and resources.

## Low Adoption Remains a Problem for Enterprise Collaboration

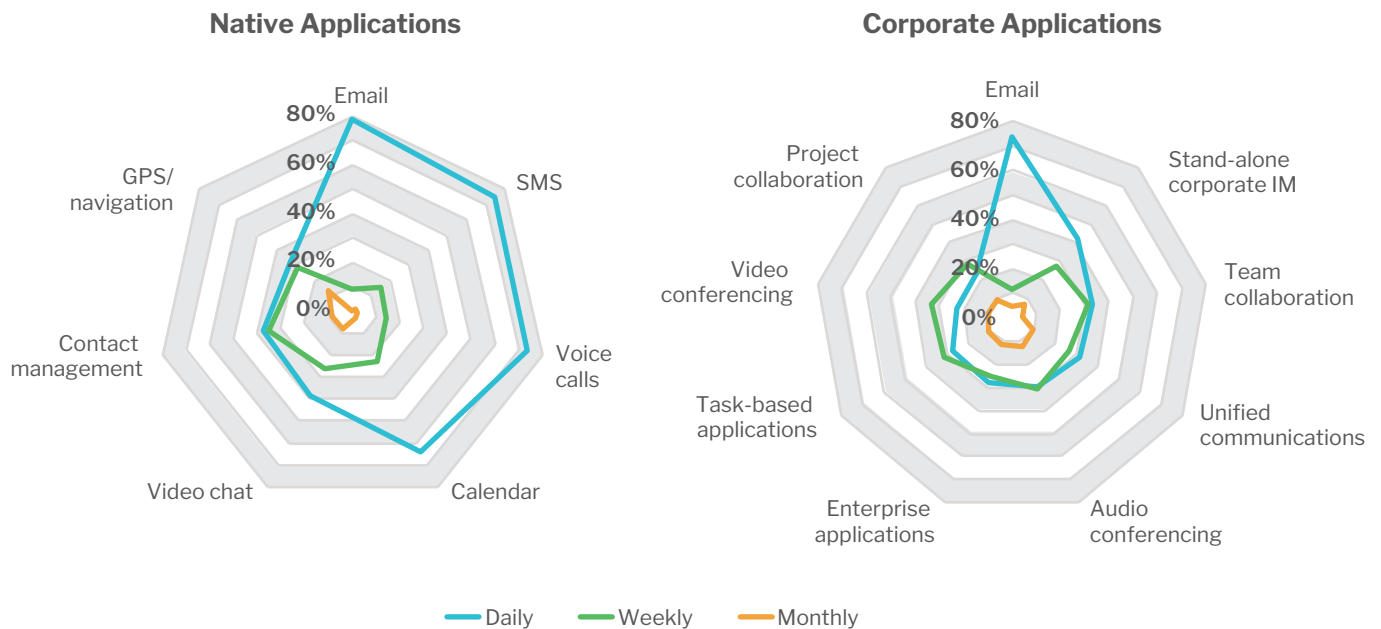
Survey results show that user adoption in the collaboration tools they provide to their employees remains a challenge for many organizations. Our research shows that – with the exception of email – employee use of corporate applications on their smartphones is low. Only one out of three respondents said they use the team collaboration (33%) or unified communications (32%) apps on their smartphones on a daily basis (Figure 17).

Furthermore, the use of SMS and over-the-top (OTT) messaging apps persists, even when corporate-issued alternatives are available. Three out of four respondents (75%) said they use SMS on a daily basis. Overall, most respondents indicated a high level of preference for mobile-native applications over corporate applications (Figure 17).

Figure 17: Employees show a strong preference for mobile-native over corporate applications

Source: 451 Research

Q: How often do you use the following mobile applications on your smartphone for business purposes?

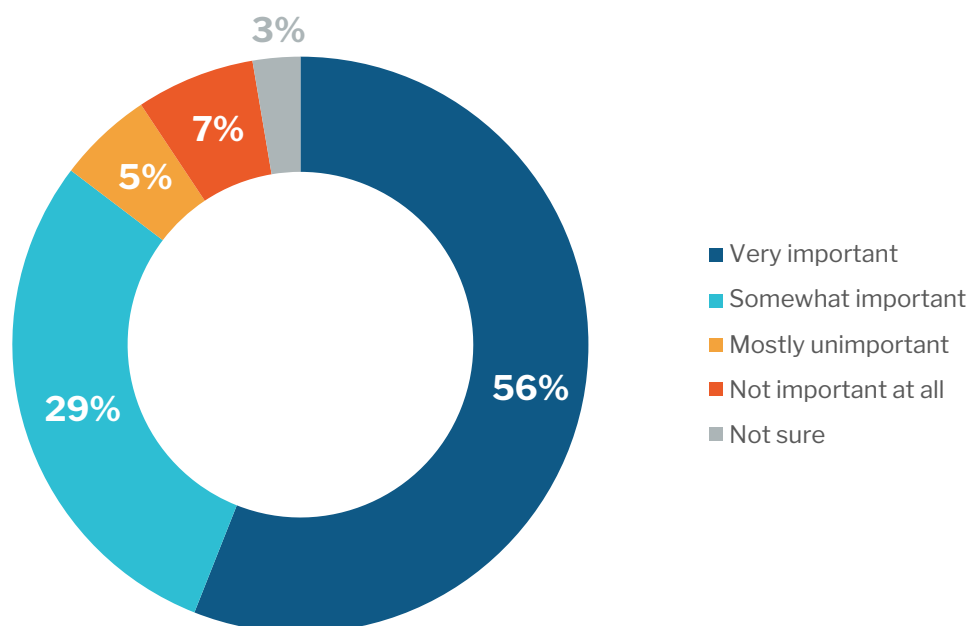


This can be problematic in several ways. Not only will it result in a limited role for IT – who will be unable to provide support for these technologies – but it will also result in self-imposed limitations for internal communications within the organization. There are also several security risks involved in using non-IT-sanctioned applications for work purposes.

Figure 18: Employees show a strong preference for mobile-optimized applications

Source: 451 Research

Q: How important is it that your messaging tool is optimized for mobile-specific working (e.g., designed for ease of use on a smartphone)?



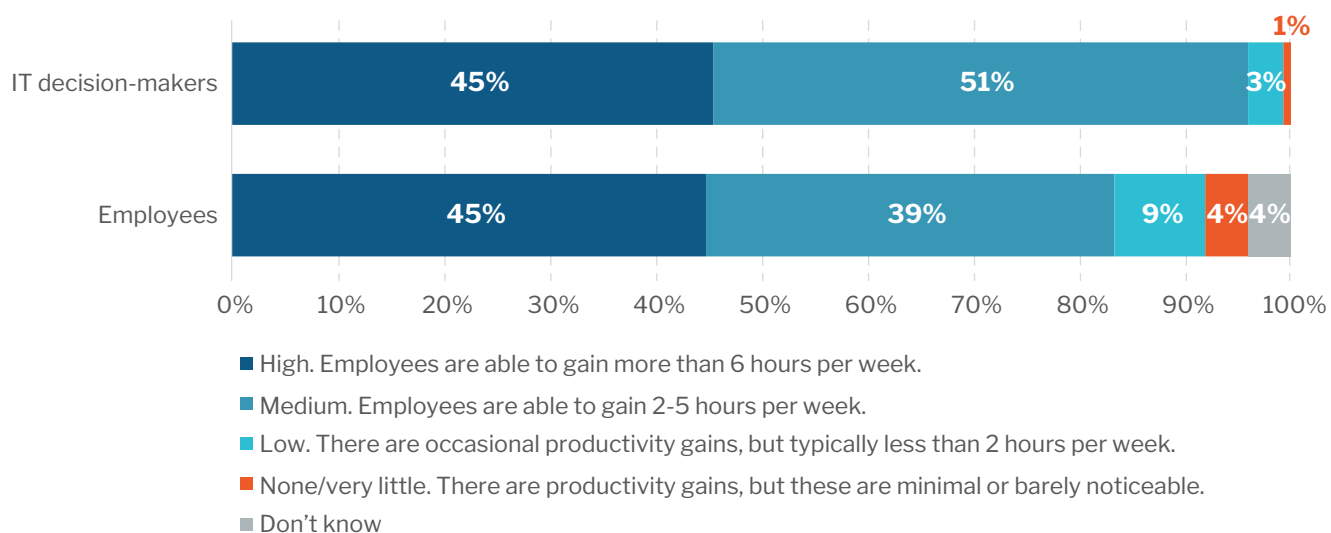
## Mobile-First Communications Drive Productivity

Our research also shows that both employees and IT decision-makers have a positive perception in terms of the impact that mobile communications in the workplace can have on productivity. Survey results show that nearly half (45%) of IT decision-makers believe employees stand to gain six or more hours of productivity as a direct result of using messaging or team collaboration tools on their smartphones. This is consistent with the numbers reported by employees (45%), as shown in Figure 19.

Figure 19: Mobile messaging can have a significant impact on employee productivity

Source: 451 Research

Q: How much more productive are employees as a direct result of using messaging/team collaboration tools?



**BLACK & WHITE** | MOBILE-FIRST COMMUNICATIONS DRIVE PRODUCTIVITY GAINS FOR THE CONNECTED WORKFORCE

# Conclusions

A significant volume of business communications is now conducted on mobile devices. Employees are increasingly relying on smartphones for both business and personal purposes; this is particularly true for Millennials, who use their devices several times a day to communicate with their coworkers.

These behavioral patterns reflect larger trends in the workplace. Our research shows that mobile, messaging and flexible working are now the norm in the modern workplace. Survey results also show that organizations are looking to support changing workstyles and a growing mobile workforce by adjusting their policies to support flexible working arrangements and BYOD policies.

These are steps in the right direction, but our research shows there are still gaps in terms of providing the right technologies that support the modern work environment. Organizations still tend to address mobility as an added feature rather than a mission-critical capability. This results in technical limitations that impact the user experience, leading employees to rely on alternative services for real-time, peer-to-peer communications, which opens the door to privacy, compliance and security risks.

The reality is that flexibility in the workplace without the right technology can lead to a fragmented collaboration landscape, resulting in limited productivity gains. Furthermore, such a situation lends itself to less than adequate security practices, which can place the organization at risk. Whether they realize it or not, many organizations are playing with fire because they aren't taking a comprehensive approach with their business communications and collaboration technology strategy.

We believe this points to the need for organizations to adopt a mobile-first, messaging-first communications strategy. These are key components for enabling an agile work environment, providing employees with ubiquitous access to content and applications, regardless of their location or the device or network they choose to use.



## About 451 Research

451 Research is a leading information technology research and advisory company focusing on technology innovation and market disruption. More than 100 analysts and consultants provide essential insight to more than 1,000 client organizations globally through a combination of syndicated research and data, advisory and go-to-market services, and live events. Founded in 2000 and headquartered in New York, 451 Research is a division of The 451 Group.

© 2019 451 Research, LLC and/or its Affiliates. All Rights Reserved. Reproduction and distribution of this publication, in whole or in part, in any form without prior written permission is forbidden. The terms of use regarding distribution, both internally and externally, shall be governed by the terms laid out in your Service Agreement with 451 Research and/or its Affiliates. The information contained herein has been obtained from sources believed to be reliable. 451 Research disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although 451 Research may discuss legal issues related to the information technology business, 451 Research does not provide legal advice or services and their research should not be construed or used as such.

451 Research shall have no liability for errors, omissions or inadequacies in the information contained herein or for interpretations thereof. The reader assumes sole responsibility for the selection of these materials to achieve its intended results. The opinions expressed herein are subject to change without notice.



### NEW YORK

Chrysler Building  
405 Lexington Avenue, 9th Floor  
New York, NY 10174  
+1 212 505 3030



### SAN FRANCISCO

505 Montgomery Street,  
Suite 1052  
San Francisco, CA 94111  
+1 212 505 3030



### LONDON

Paxton House  
30, Artillery Lane  
London, E1 7LS, UK  
+44 (0) 203 929 5700



### BOSTON

75-101 Federal Street  
Boston, MA 02110  
+1 617 598 7200

