



Sage U.S. SMB Survey on Mobile Devices 2014 Summary report

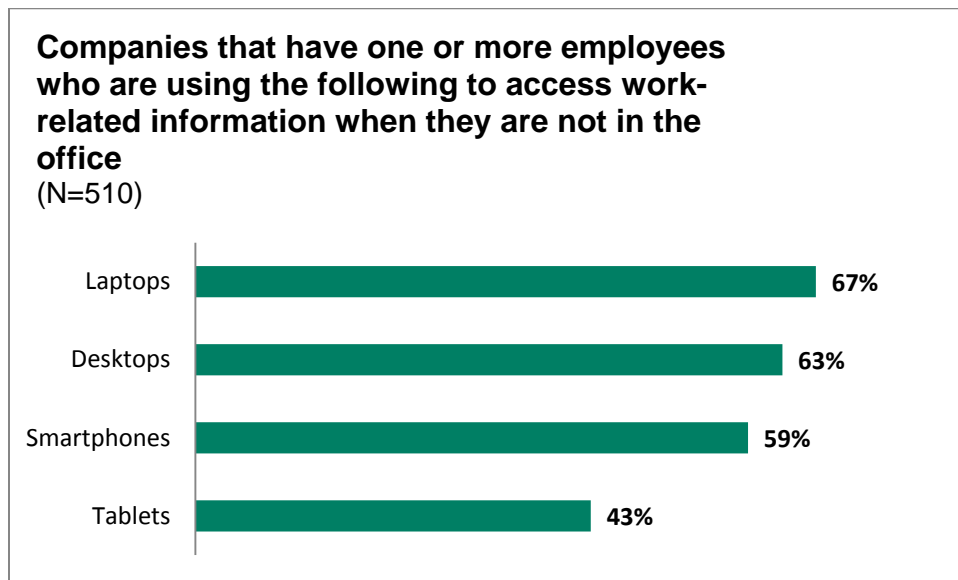
Introduction

The shift of small and medium-size businesses from using computing technology on site only to using mobile technology has been of increasing interest to business managers, who are looking for ways to make their businesses more efficient. This is a survey of SMB managers and employees in the United States about their opinions on mobile technology in the workplace and how this technology is actually implemented.

The survey first explores how company leadership feels about the use of mobile technology in the business environment, whether or not they personally use laptops, smartphones, tablets, or desktops away from the office. Of the 1,090 respondents who began the survey, 45% of these were from business management (owners, CEOs, presidents, controllers, or CFOs). Some of their responses are compared to the 2013 Sage SMB Survey on Mobile Devices.

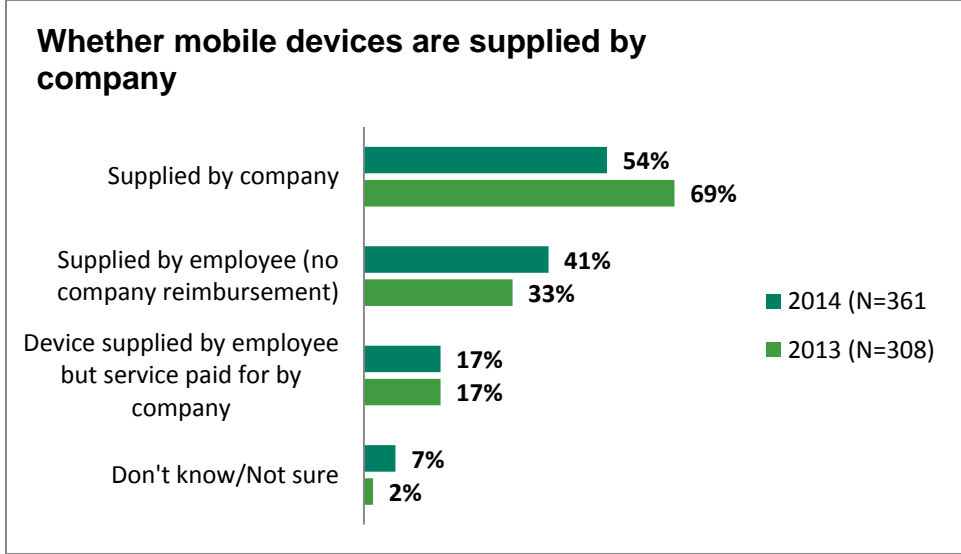
How executives view mobile technology within their business

Laptops and desktops are the most common mobile devices used by employees away from the office, followed by smartphones and tablets.

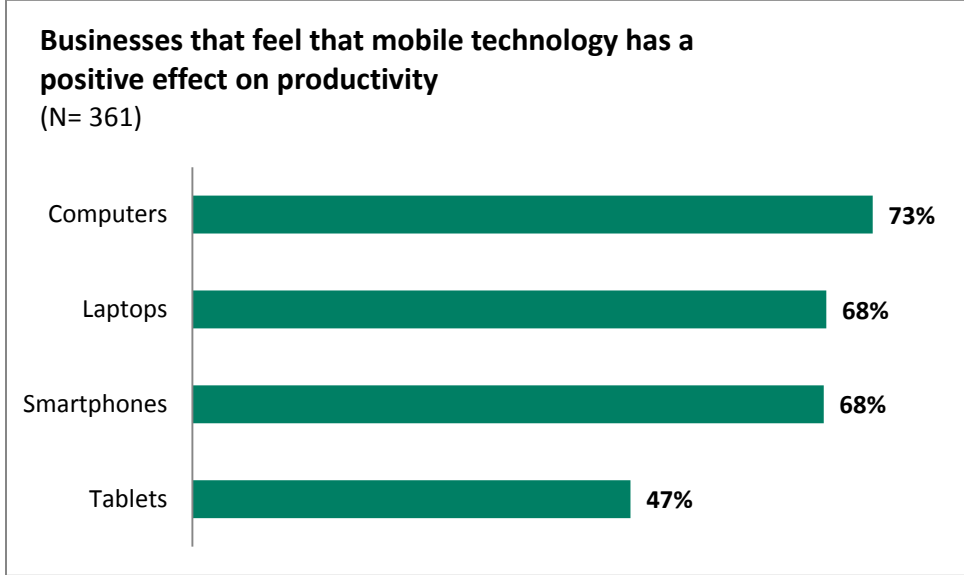


Slightly more than half of companies surveyed (54%) supply mobile devices to their employees, lower than reported in the previous year (69%). Companies are slightly more likely than in 2013 to allow employees to supply their mobile devices for company business with no company reimbursement.

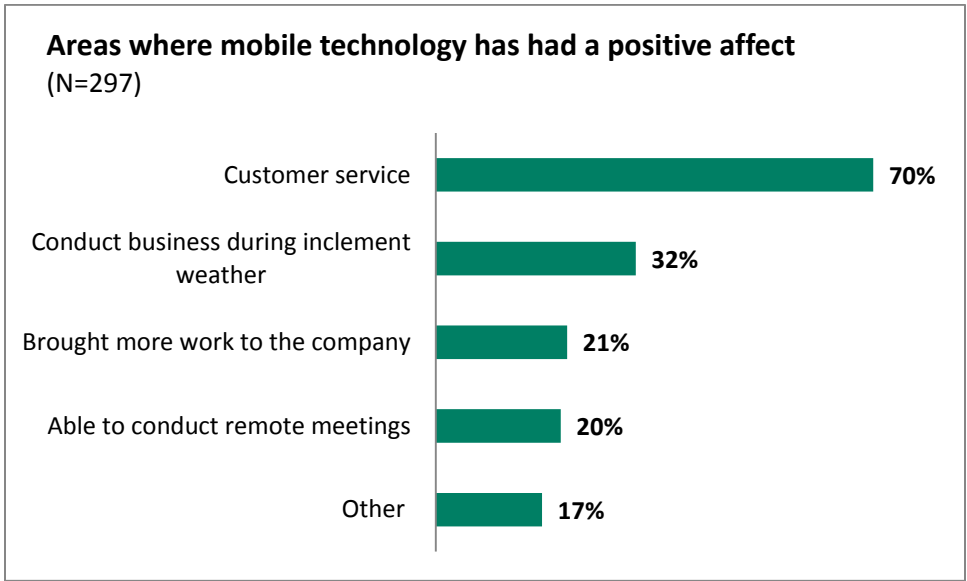
Changes in policy about bringing employee devices at work have not significantly changed from the previous year. Slightly less than half of the executives responding have a policy that lets employees bring their own devices (44%), while about one in ten have considered a BYOD policy (13%) but decided not to permit employees to bring and use their own devices.



Business executives are generally positive on the effect of mobile technology. When asked which media had an especially positive effect on their company’s productivity, desktop computers were most commonly mentioned, followed by laptops and smartphones. Slightly less than half felt that tablets had a positive effect on productivity.

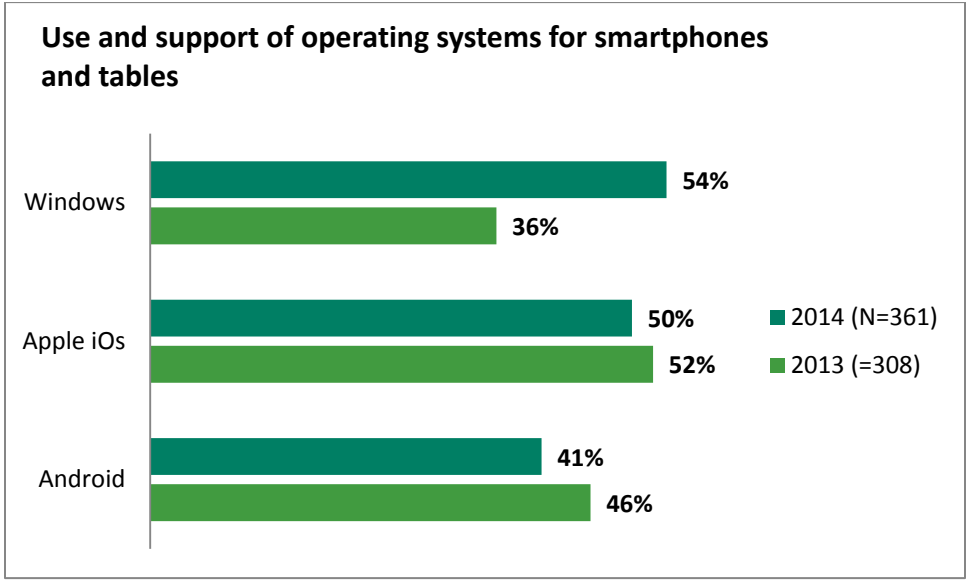


When asked about where mobile technology had a positive effect, seven out of ten mentioned that it was especially effective for customer service (70%). It also helped employees conduct business during inclement weather and conduct remote meetings. Twenty-one percent of executives report that mobile technology has helped bring more work to their company. When asked to expand on the positive effect of mobile technology, respondents mentioned the benefits of keeping in contact with all employees, wherever they are working at any time of the day, that it can reduce the time spent commuting to the office, and meeting client needs by providing in-home and off-site services.

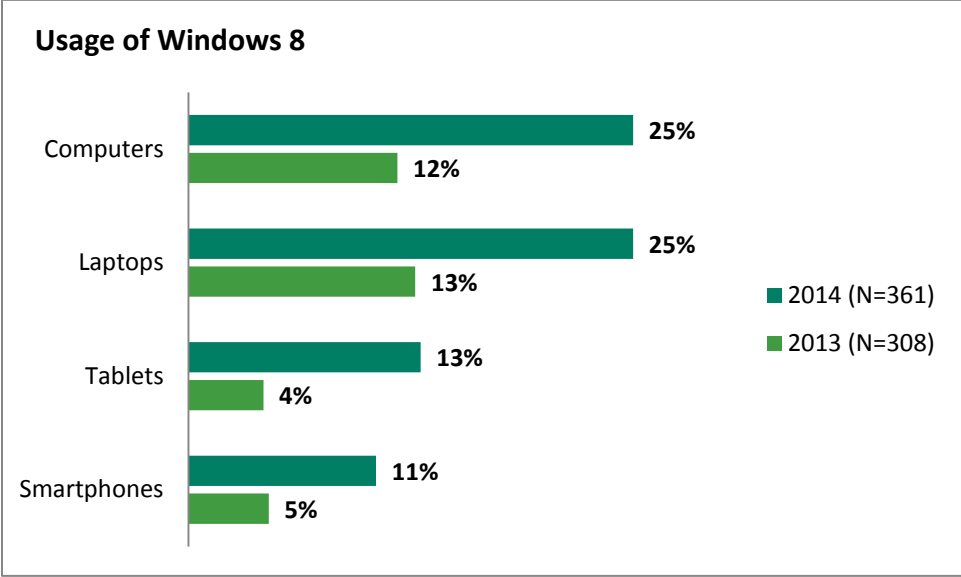


Slightly more than three quarters of business executives generally do not budget for mobile devices, preferring instead to purchase them as the need arises. Five percent report that their business sets an annual budget for mobile items and sticks to it, while slightly more than one in ten (12%) sets an annual budget and adjusts expenditures as needed.

Business executives whose employees used mobile devices were asked which operating systems they used and supported for smartphones and tablets. The same questions were used in the mobile survey of 2013. Windows was the operating system most commonly used (54%), improving over the previous year (36%). Apple iOS closely followed (50%) little changed from the previous year, with the Android OS following behind (41%). Reported usage of the Android system slightly declined over the previous year.



Usage of the Windows 8 operating system has dramatically increased over the previous year. A quarter of executives responding report that their businesses use it for computers or laptops, while a smaller proportion use it for tablets or smartphones.

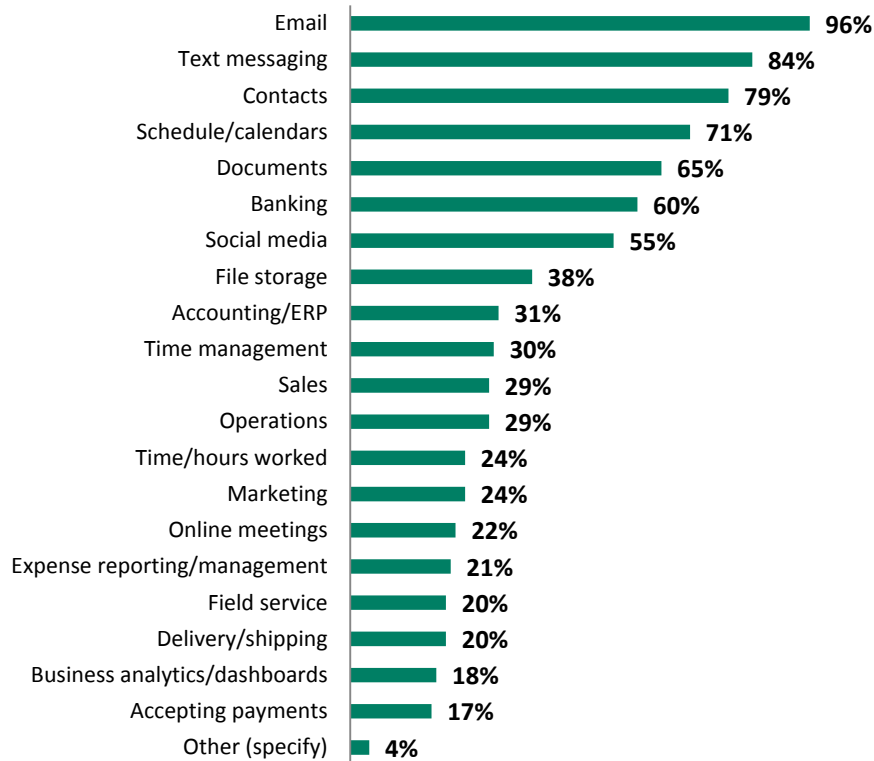


Employee use of mobile technology

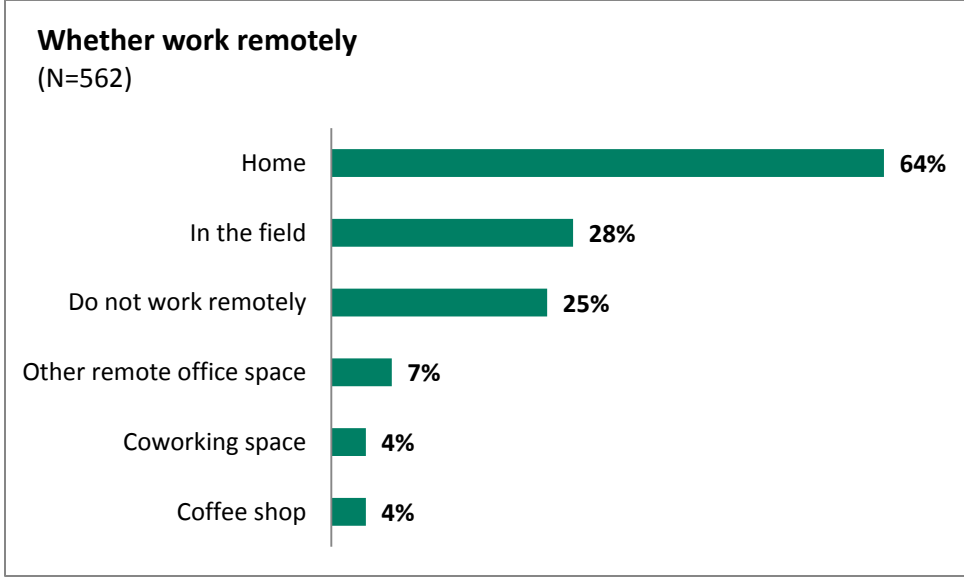
Slightly more than half of the survey respondents (51%) personally use a mobile device to access work-related information remotely (when away from the office or their main computer). About two out of five respondents who use mobile applications are using a work-related application on their mobile device (other than a laptop) that connects to the cloud. Employees most commonly use mobile applications for checking their email (96%), text messaging (84%), managing contacts (79%) and their calendar (71%), documents (65%), banking (60%), and social media (55%). Employees are least likely to check dashboards or other more specialized business functions.

Types of work-related information or applications accessed remotely on a mobile device

N=424



About three out of five the employees surveyed who had mobile devices (64%) used it to work from home or in the field (28%). A very small proportion of employees admitted that they used a mobile device in a coffee shop (4%). One-quarter (25%) of those who have a mobile device do not work remotely.



The survey was conducted by Sage between April 18 and May 4, 2014 among an independent panel of small and medium-sized businesses in the United States. The margin of error for the executive respondents is +/- 5% and among mobile device users +/- 4% with a confidence level of 95 percent.

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