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# **The Mobile Corporation in South Africa, 2019**

Study conducted by World Wide Worx

In partnership with SYSPRO

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# Introduction

As the Fourth Industrial Revolution's technologies become more pervasive, government and small business struggle to remain relevant in an ever disruptive market.

At the South African Digital Economy Summit earlier this year, focused on the Fourth Industrial revolution, South African president Cyril Ramaphosa said: "Access to broadband and connectivity is a lever to socio-economic inclusion and an absolute necessity." This forms part of a wider goal for achieving digital transformation within the next ten years, as outlined in the National Development Plan's Vision 2030.

To achieve these goals, businesses and government will need to develop entrepreneurial skills in order to create new products, which may simplify or add value to the way industry has performed tasks in the past. These efforts can only be realised through reliable connectivity, and strong decentralised software platforms.

Government-owned Telkom no longer has a monopoly on fixed-line connectivity, which has enabled price competition among fibre players. Since the major rollout of fibre connectivity by independent providers, fixed connectivity has seen a significant rise in reliability and speed.

Mobile connectivity is becoming increasingly affordable. Reliable 4G/LTE connections have shown that the always-connected environment is a possibility for businesses. Competition by mobile providers in this space has also driven increased coverage - a point where providers with greater reach can justify high data prices.

With stable connectivity arriving, South African businesses are reaping the benefits of decentralised software platforms, such as Google Apps for Work and Dropbox cloud storage. Even on a personal level, consumers are placing trust in products like Gmail, which make the transition to corporate tools like Google Mail for Work easier.

This trend is expected to grow, assuming connectivity and software evolution continues on its current trajectory. With 5G on the horizon, businesses are about to realise the benefits of mobile connectivity to its full business potential.

With all the corporate pain points removed, businesses can begin to focus on what truly matters: getting the job done.

# Executive Summary

## SA Manufacturers fall behind in connectivity

### Corporate digital divide holds back uptake

South African manufacturers have fallen behind the curve of rapid advances in connectivity that make advanced technologies possible.

This is a key finding of a new study which reveals that manufacturing enterprises typically use slower forms of connectivity than enterprises in general, and have had to use stopgaps to cross the corporate digital divide.

*The Mobile Corporation in South Africa 2019*, a research study conducted by World Wide Worx in partnership with enterprise software company Syspro, shows rapid uptake of fibre connections by enterprises in general – but with the manufacturing sector lagging behind.

The study, based on telephonic interviews with information technology (IT) decision makers at 400 large companies in South Africa, found that, while 63% of manufacturing enterprises regarded fibre-to-the-office as a key technology, this figure leaped to 74% for other industries.

“With one of our organisation’s key vertical focuses being that of manufacturing, it was surprising to see that manufacturers in this country prefer legacy forms of connectivity over the unprecedented opportunities that advanced forms of connectivity have proven to offer,” says Mark Wilson, managing director of SYSPRO Africa.

"This has the potential to have a negative impact not only on productivity and overall output, but also on the abilities of these organisations to remain agile and competitive.”

Overall, voice communications remains the heart of the corporation, with landlines and basic cellphones being ranked the most important hardware devices by all respondents. However, this area also revealed a massive gap between manufacturers and the rest, with 73% of the former regarding each of these as important, versus 89% for other industries.

A fascinating aspect of the findings was the importance of Wi-Fi, and in particular the emergence of mobile Wi-Fi devices. Almost half of all respondents, 47%, regard Wi-Fi in the office as important, with similar levels of use across industries. Mobile Wi-Fi is only regarded as important by 23% of respondents across all industries, but only 12% regarded it as unimportant, indicating that it is beginning to fill the gap left by poor access to other high-speed connectivity.

“The research shows that connectivity has become important across all categories of activity, at the workstation, moving about the office environment, and beyond the office,” says Arthur Goldstuck, managing director of World Wide Worx.

“This is further emphasised by the fact that the laptop computer has become as important as the desktop machine in corporate South Africa – both are regarded as important by exactly two thirds of respondents. The importance level is the same across all industries, revealing the extent to which mobile productivity has become a pervasive need.”

Further supporting this conclusion, 42% of respondents reported that employees were away from their desks, on average, around two to three times a day, probably taking their devices along with them to work on-the-go.

The need for constant connectivity can be attributed to various factors, such as the cloud computing, cloud collaboration tools, and contact solutions. Cloud collaboration was rated as important by 79% of companies, indicating the impact of ERP solutions in the cloud.

## **Companies tighten their budgets for software**

A tight economy is beginning to bite hard for consumers and businesses alike, with South African corporations for the first time shifting their technology purchasing behaviour away from a primary emphasis on quality.

Most previous research by World Wide Worx found that quality and after-sales service for both hardware and software solutions were the primary purchase factors among large businesses as well as for small and medium enterprises. Historically, these factors have been far ahead of purchasing price, with companies more concerned about the solution’s value and reliability.

Typically, price was always the third most important factor. This meant that it remained important, but only when the first two criteria were met. If the first two were the same across product choices, then price became the deciding factor. That has now changed.

For *The Mobile Corporation in South Africa 2019* study, respondents were asked to rate factors in budgeting as from very unimportant to very important. Of these factors, price was ranked very important by 72% of respondents. This was followed by quality of the product or service, with 63% rating it very important. Stock availability also came in at that level.

One of the factors identified behind this trend is the fact that solutions have tended to become subscription-based, meaning that the initial purchase is not the only cost. The positive consequence, however, is that companies no longer have to worry

about future-proofing solutions, with this factor now regarded as very important by only 35% of respondents.

“It’s no surprise that mobility continues to gain increasing prominence as a concept that the fourth industrial revolution has brought with it,” says Wilson. “This is further echoed by the fact that cloud collaboration was rated as important by 79% of companies, indicating the impact of ERP solutions in the cloud.”

Goldstuck concurs: "While cost is obviously a key budgeting factor, organisations have to be very wary of compromising their competitiveness because they are trying to shave off a small proportion of cost."

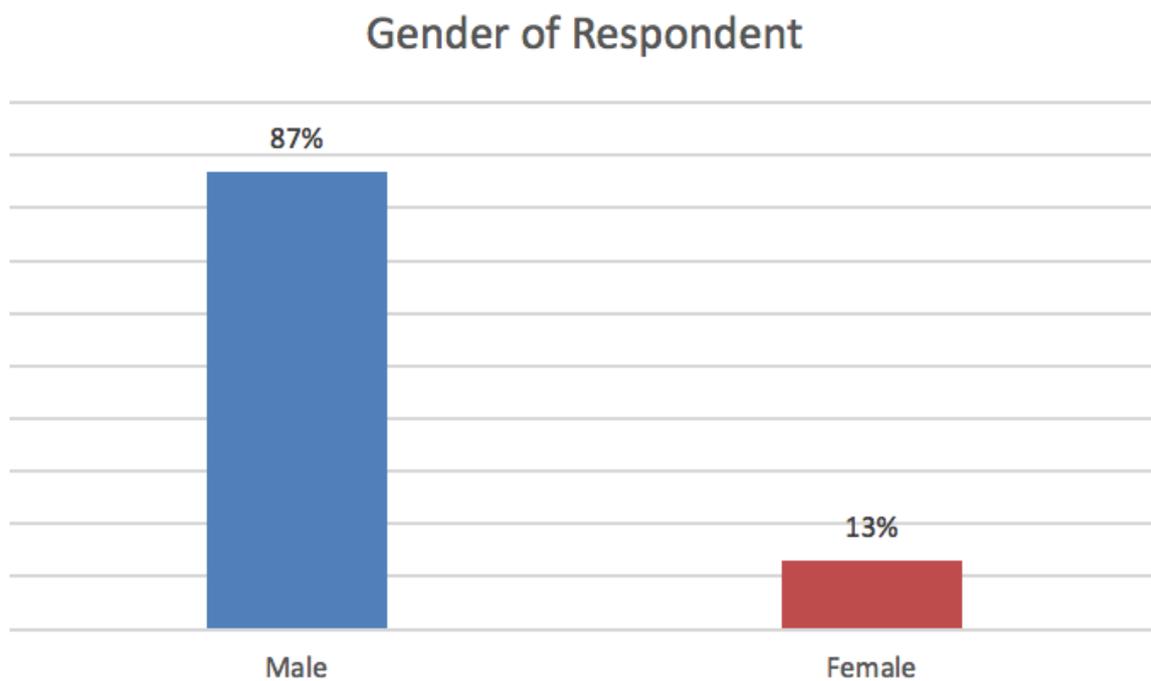
## **Methodology**

The study was based on telephonic interviews with information technology (IT) decision makers at 400 large companies in South Africa. In order to establish the differences between the manufacturing sector and large enterprises in general, criteria-based sampling was used to interview 200 IT decision makers from the manufacturing industry.

# Survey Demographics

IT decision-makers at a total of 400 large South African companies participated in telephonic interviews the first half of 2019 to ascertain usage, priorities and intentions regarding technology in their organisations. Companies in South Africa are defined as “Corporate” when they have more than 100 or 200 staff members, depending on industry sector. This survey uses the 100+ definition, due to the limited number of larger organisations available in South Africa.

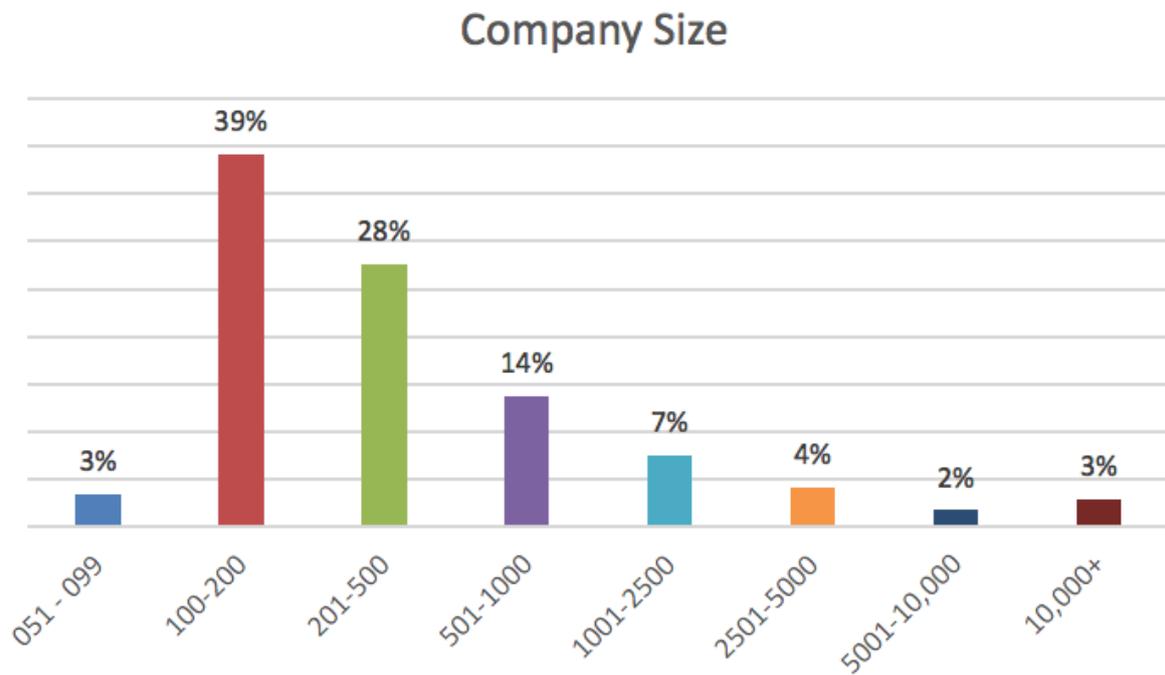
## Gender of Respondent



87% of respondents reported that they were male, showing the continuing trend of IT decision makers being men.

Gender	Percentage Respondents (%)
Male	87%
Female	13%

## Company Size

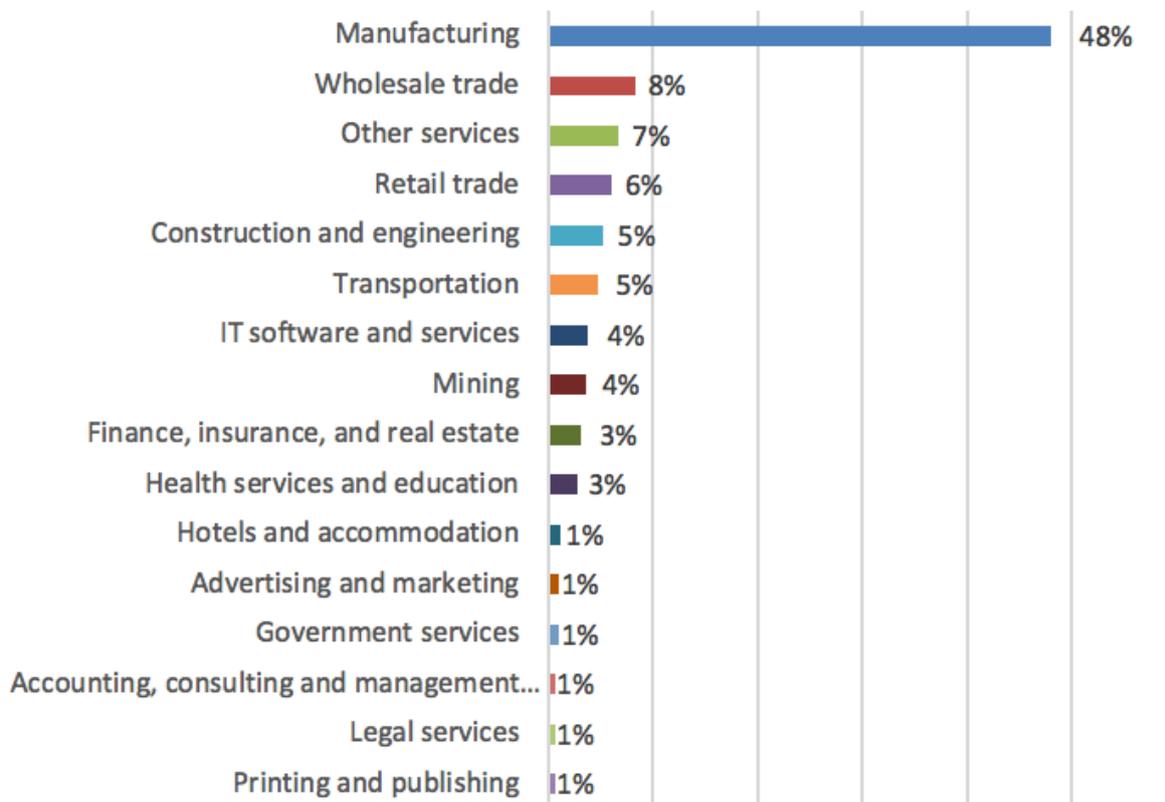


Companies with 100-200 employees make up 39% of the respondents, followed by the 201-500 group, with 28%. This dips off as the companies grow in size.

Company Size	Percentage Respondents (%)
100-200	3%
201-500	39%
501-750	28%
751-1000	14%
1001-2500	7%
2501-5000	4%
5001-10000	2%
10000+	3%

# Operating Sector

## Operating Sector

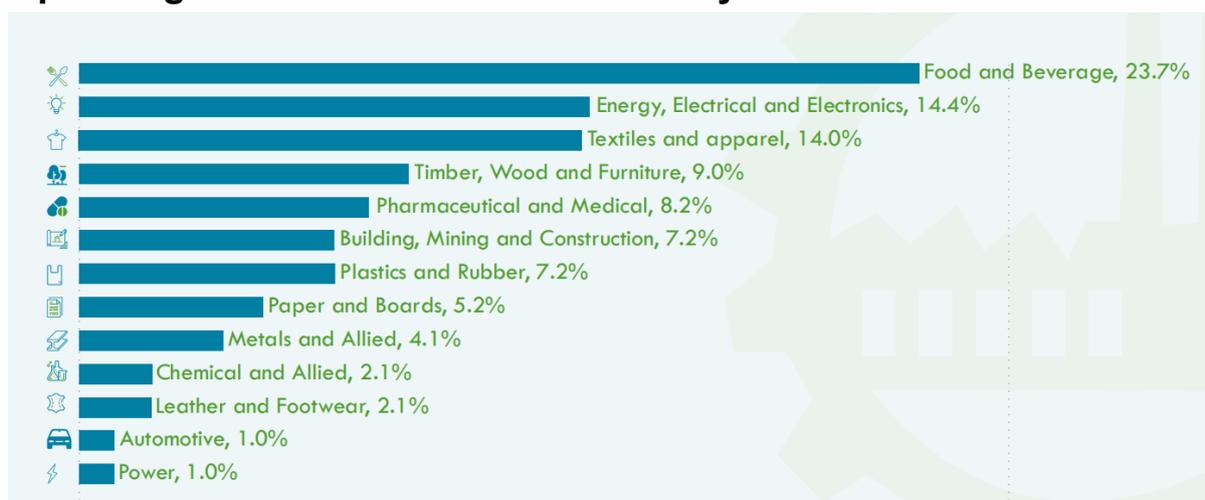


The highest, and most significant, proportion of respondents is from the manufacturing sector, with 48%, or just under half, being manufacturers. This emphasis was placed on the sector because of its large impact on the economy.

Industry Sector	Percentage Respondents (%)
Manufacturing	48%
Wholesale trade	8%
Other services	7%
Retail trade	6%
Construction and engineering	5%
Transportation	5%
IT software and services	4%
Mining	4%

Finance, insurance, and real estate	3%
Health services and education	3%
Hotels and accommodation	1%
Advertising and marketing	1%
Government services	1%
Accounting, consulting and management services	1%
Legal services	1%
Printing and publishing	1%
Logistics and distribution	0%
Communication and broadcasting	0%
General business services	0%
Real Estate	0%
Telecommunications	0%
Travel and tourism	0%
Utilities and energy services	0%

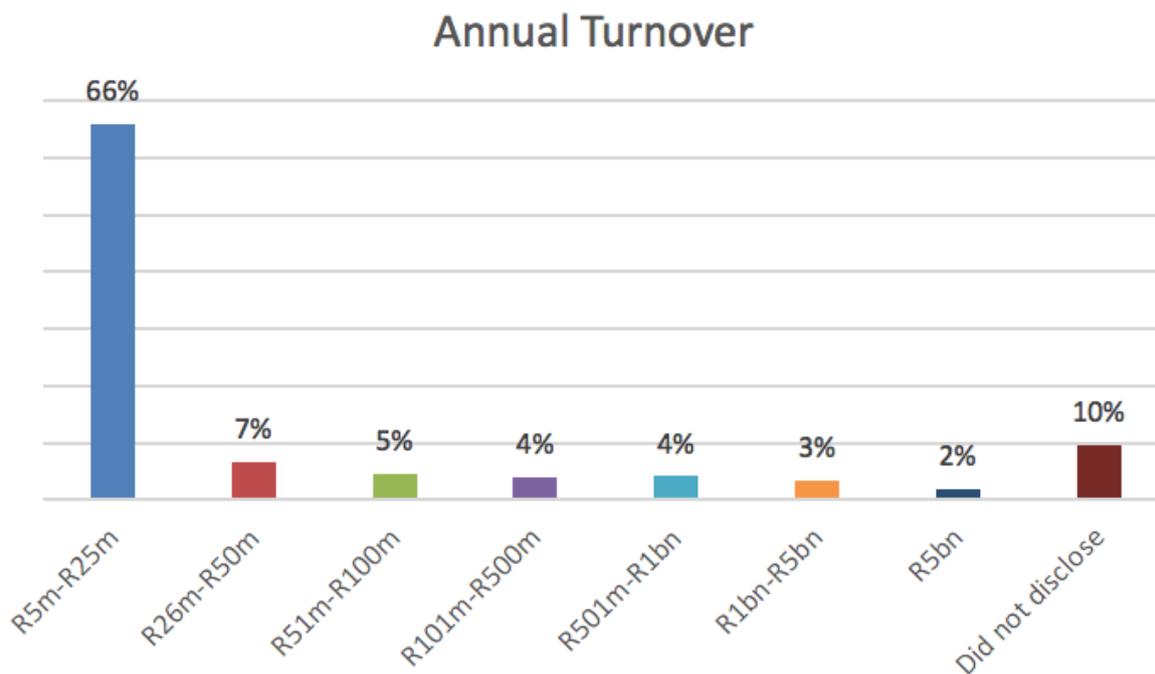
## Operating Sector - Strathmore University's results



The industry with the higher proportion of response was the food and beverage sector, at 23.7%. After this, there is no clear majority indicating a spread among the industries.

Industry Sector	Percentage Respondents (%)
Food and Beverage	24%
Energy, Electrical and Electronics	14%
Textiles and apparel	14%
Timber, Wood and Furniture	9%
Pharmaceutical and Medical	8%
Building, Mining and Construction	7%
Plastics and Rubber	7%
Paper and Boards	5%
Metals and Allied	4%
Chemical and Allied	2%
Leather and Footwear	2%
Automotive	1%
Power	1%

# Annual Turnover



The annual turnover of 66% of companies is between R5m and R25m, which is closely tied to the majority of companies being 100-200 in size.

Company Size	Percentage Respondents (%)
R5m-R25m	66%
R26m-R50m	7%
R51m-R100m	5%
R101m-R500m	4%
R501m-R1bn	4%
R1bn-R5bn	3%
R5bn	2%
Did not disclose	10%

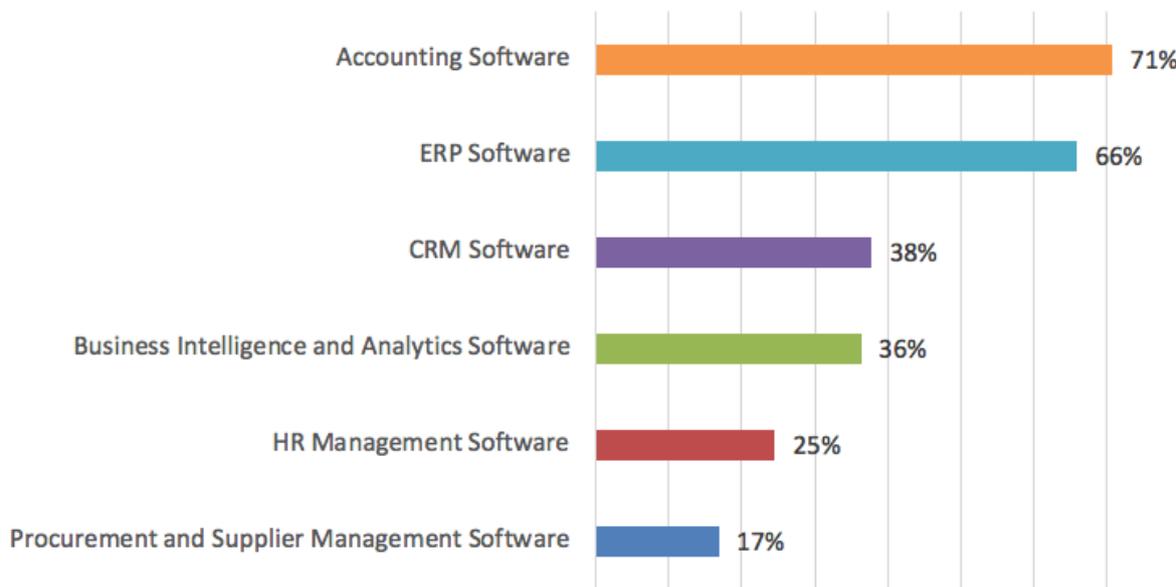
# Headline Findings

## Part 1: Devices and Software in Corporate

This part introduces what devices, software and other software are important to the corporate world. Each section is coupled with a short piece of research to explain why the results have occurred.

### Essential Business Software

Essential software to the company



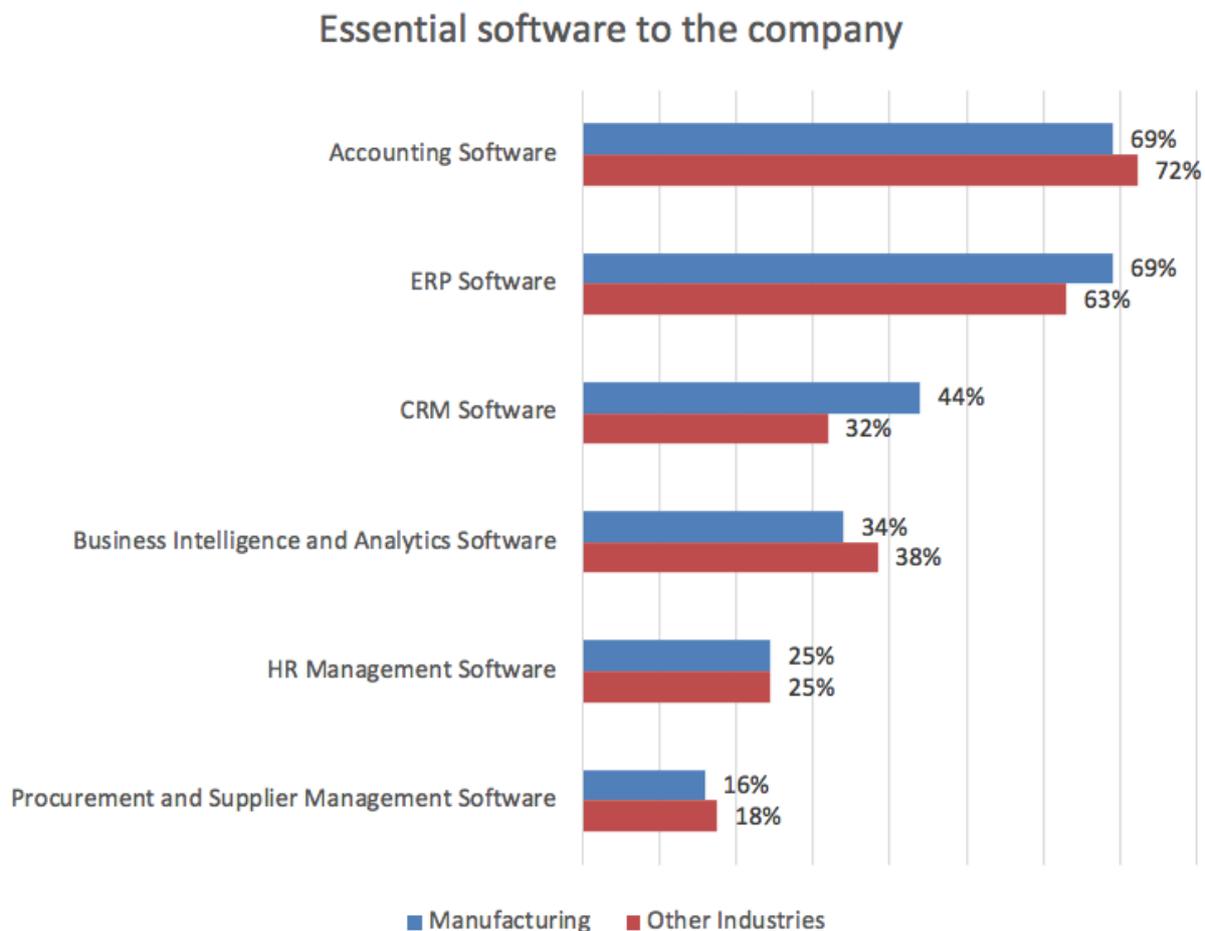
A significant proportion of respondents, 71%, say that accounting software is essential to their company. This is followed by ERP software, 66%. Then much later on, CRM software features at 38%. Accounting packages are some of the most popular business software available to corporates, as they were one of the first applications of computers in business <sup>1</sup>.

Category	Percentage (%)
Accounting Software	71%
Business Intelligence and Analytics Software	66%
CRM Software	38%
ERP Software	36%

<sup>1</sup> Johnson, M.W., Christensen, C.M. and Kagermann, H., 2008. Reinventing your business model. *Harvard business review*, 86(12), pp.57-68.

HR Management Software	25%
Procurement and Supplier Management Software	17%

## Essential Software Categories, by Manufacturing and Other Industries



The technology with the largest parity is CRM software, where the manufacturing sector is 12% ahead of other industries in considering CRM software to be essential.

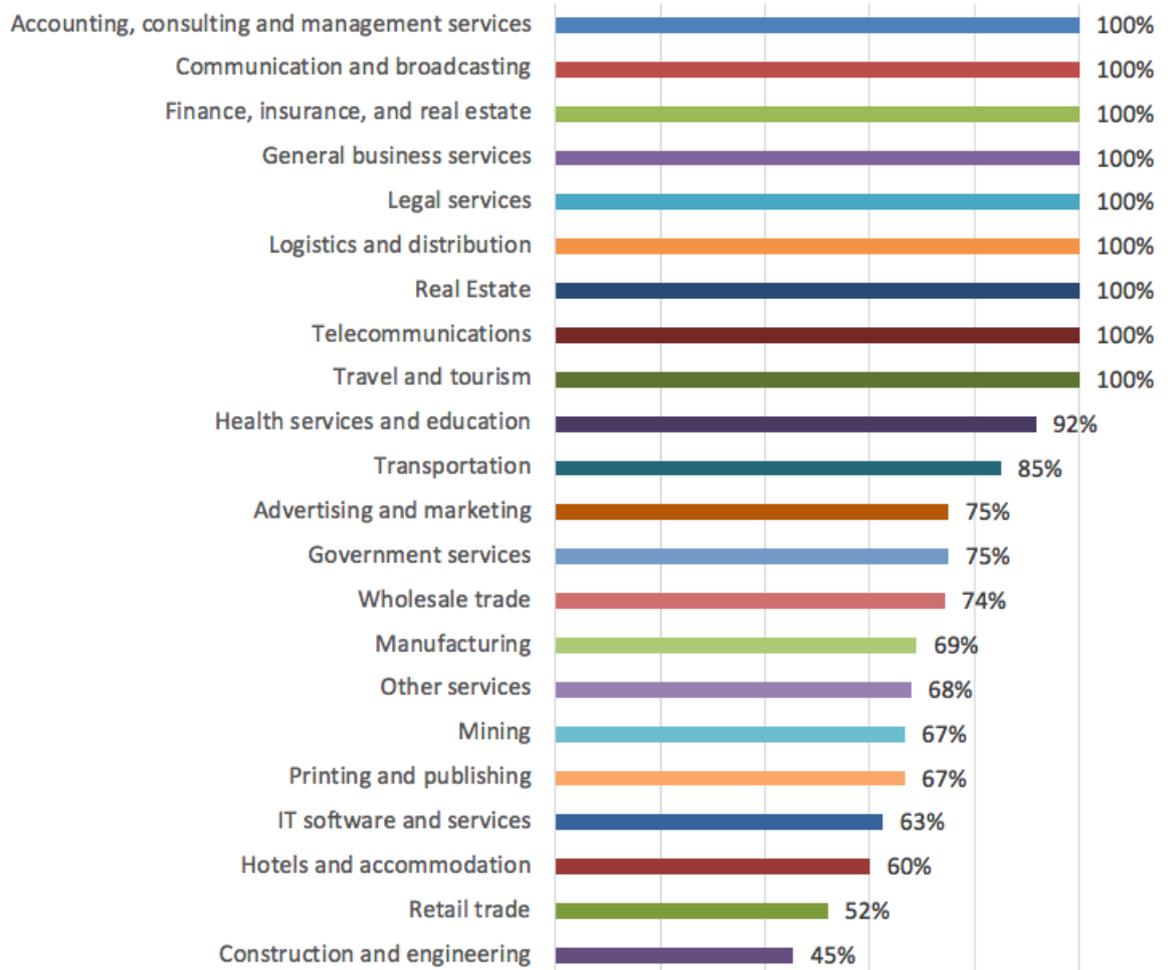
Essential software to the company	Manufacturing	Other Industries
Accounting Software	69%	72%
ERP Software	69%	63%
CRM Software	44%	32%

Business Intelligence and Analytics Software	34%	38%
HR Management Software	25%	25%
Procurement and Supplier Management Software	16%	18%

## Essential Software Categories, by Industry

### Accounting Software

#### Essential Business Software: Accounting



Every respondent from nine industries (above) reported that they use accounting software. As mentioned above, accounting software is seen as essential to most corporates, as accounting software packages automate various aspects of

accounting, which has been the benefit of accounting software since its implementation in business <sup>2</sup>.

<b>Industry</b>	<b>Percentage (%)</b>
Accounting, consulting and management services	100%
Communication and broadcasting	100%
Finance, insurance, and real estate	100%
General business services	100%
Legal services	100%
Logistics and distribution	100%
Real Estate	100%
Telecommunications	100%
Travel and tourism	100%
Health services and education	92%
Transportation	85%
Advertising and marketing	75%
Government services	75%
Wholesale trade	74%
Manufacturing	69%
Other services	68%
Mining	67%
Printing and publishing	67%
IT software and services	63%
Hotels and accommodation	60%
Retail trade	52%
Construction and engineering	45%

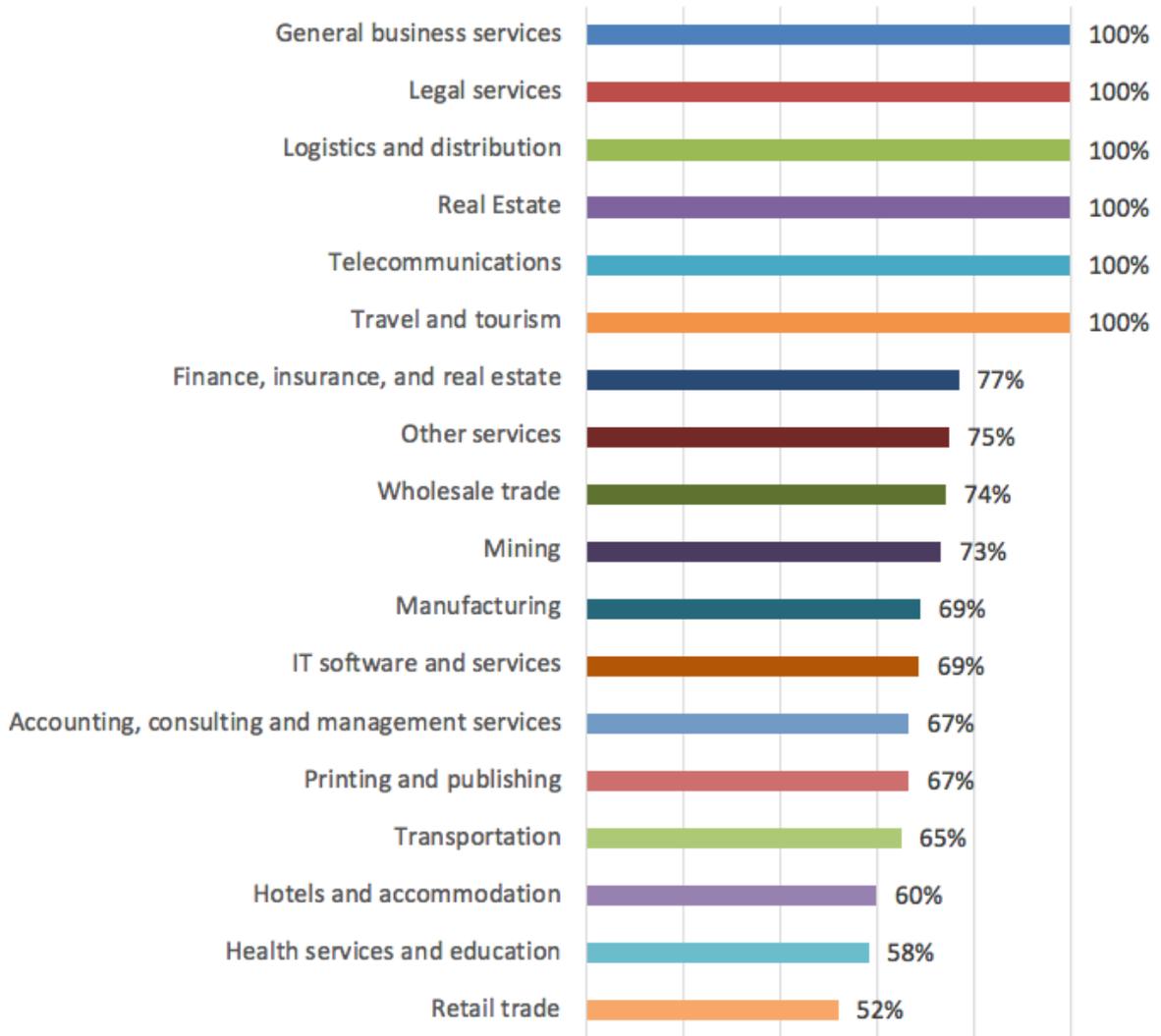
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<sup>2</sup> Al-Htaybat, K. and von Alberti-Alhtaybat, L. (2017). Big Data and corporate reporting: impacts and paradoxes. *Accounting, Auditing & Accountability Journal*, 30(4), pp.850-873.

Utilities and energy services	0%
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## ERP Software

### Essential Business Software: ERP



Every respondent from six industries (above) reported that they use ERP software. This shows the deep level of penetration ERP systems have across a vast number of industries, which ties in with a 2016 study by Jain and Sharma where the authors mentioned that businesses, regardless of business size, had benefitted from using an ERP system <sup>3</sup>.

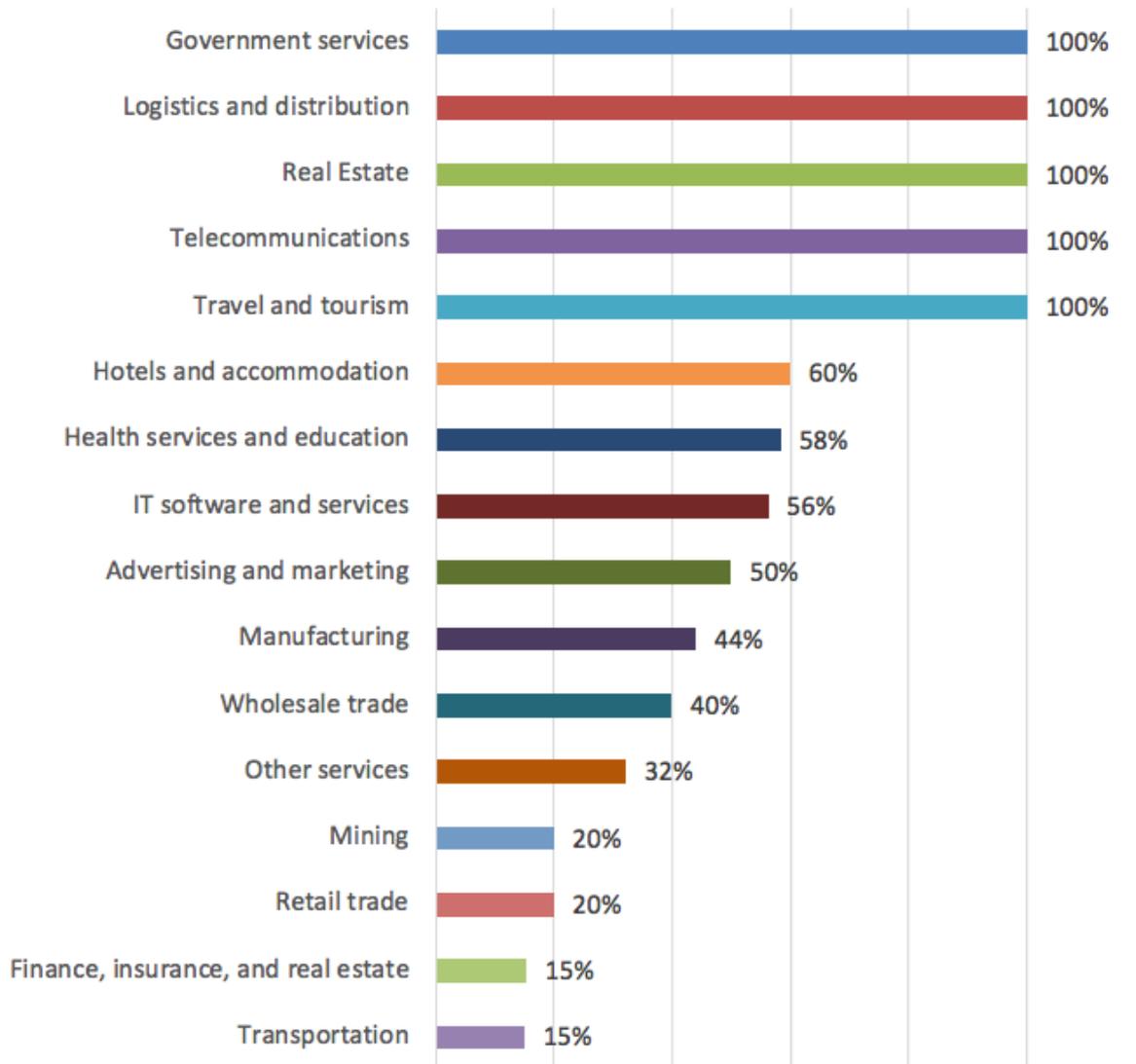
Industry	Percentage (%)
General business services	100%

<sup>3</sup> Jain, D. and Sharma, Y., 2016. Cloud computing with ERP-A push business towards higher efficiency, *Annual Research Journal of SCMS Pune*, 4, pp.140-155

Legal services	100%
Logistics and distribution	100%
Real Estate	100%
Telecommunications	100%
Travel and tourism	100%
Finance, insurance, and real estate	77%
Other services	75%
Wholesale trade	74%
Mining	73%
Manufacturing	69%
IT software and services	69%
Accounting, consulting and management services	67%
Printing and publishing	67%
Transportation	65%
Hotels and accommodation	60%
Health services and education	58%
Retail trade	52%
Advertising and marketing	25%
Government services	25%
Construction and engineering	14%
Communication and broadcasting	0%
Utilities and energy services	0%

## Customer Relationship Management Software

### Essential Business Software: CRM



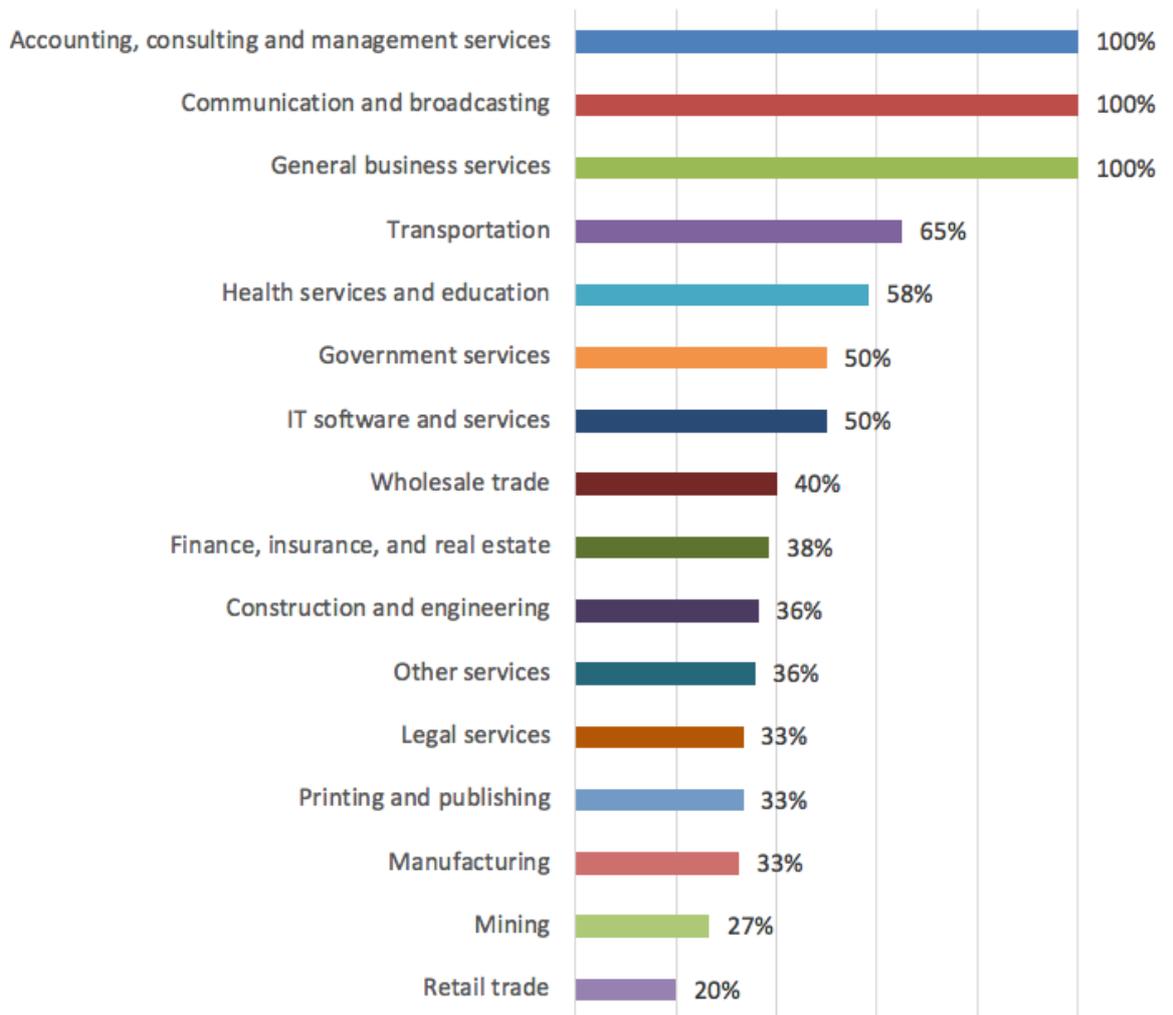
Every respondent from five industries (above) reported that they use CRM software. This shows CRM is becoming increasingly used by businesses, especially with other solutions which may have CRM as a value add.

Industry	Percentage (%)
Government services	100%
Logistics and distribution	100%
Real Estate	100%
Telecommunications	100%

Travel and tourism	100%
Hotels and accommodation	60%
Health services and education	58%
IT software and services	56%
Advertising and marketing	50%
Manufacturing	44%
Wholesale trade	40%
Other services	32%
Mining	20%
Retail trade	20%
Finance, insurance, and real estate	15%
Transportation	15%
Accounting, consulting and management services	0%
Communication and broadcasting	0%
Construction and engineering	0%
General business services	0%
Legal services	0%
Printing and publishing	0%
Utilities and energy services	0%

## Business Intelligence and Analytics

### Essential Business Software: BI and Analytics



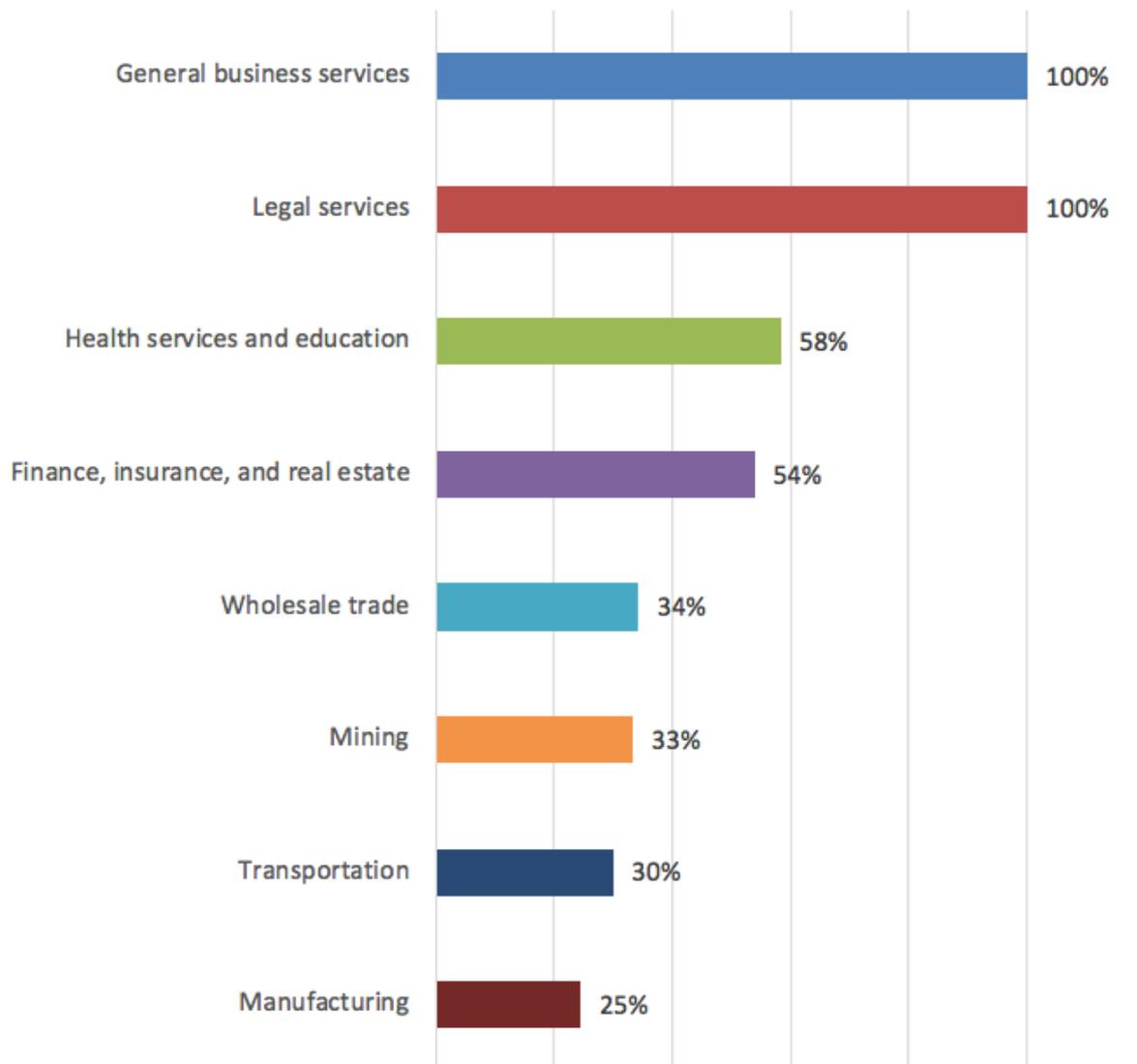
Every respondent from three industries (accounting, communications/broadcasting, and general business services) reported that they use business intelligence and analytics software. This shows BI and analytics is not being realised by the highly technical industries, like accounting and communications/broadcasting.

Industry	Percentage (%)
Accounting, consulting and management services	100%
Communication and broadcasting	100%
General business services	100%
Transportation	65%
Health services and education	58%

Government services	50%
IT software and services	50%
Wholesale trade	40%
Finance, insurance, and real estate	38%
Construction and engineering	36%
Other services	36%
Legal services	33%
Printing and publishing	33%
Manufacturing	33%
Mining	27%
Retail trade	20%
Advertising and marketing	0%
Hotels and accommodation	0%
Logistics and distribution	0%
Real Estate	0%
Telecommunications	0%
Travel and tourism	0%
Utilities and energy services	0%

## HR Management Software

### Essential Business Software: HRM



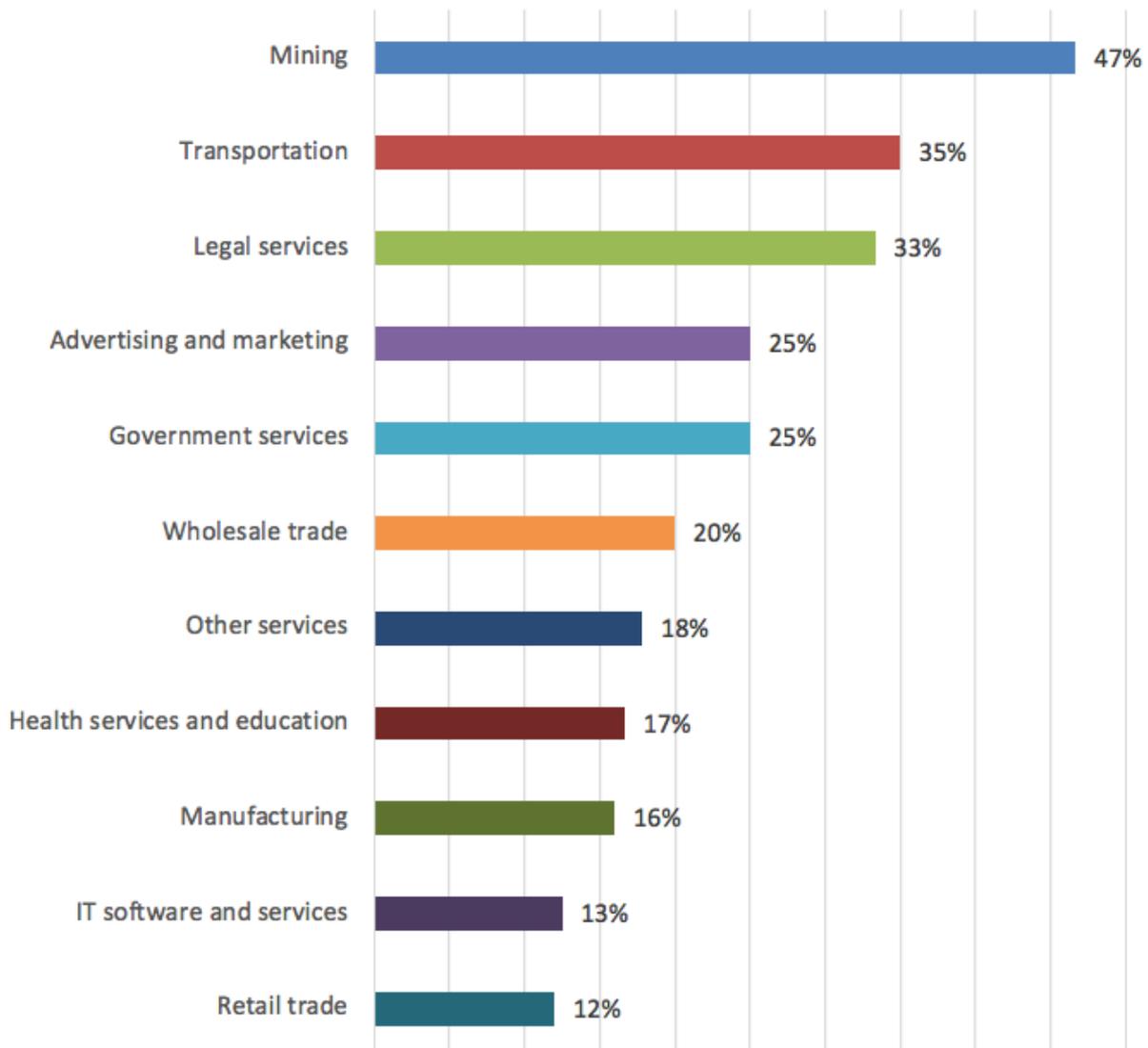
Every respondent from two industries (general business services and legal services) reported that they use human resources management software. As for the other industries, the penetration remains low. This may mean that HR is still a manual task by HR managers.

Industry	Percentage (%)
General business services	100%
Legal services	100%
Health services and education	58%
Finance, insurance, and real estate	54%

Wholesale trade	34%
Mining	33%
Transportation	30%
Manufacturing	25%
IT software and services	19%
Other services	14%
Retail trade	12%
Construction and engineering	9%
Accounting, consulting and management services	0%
Advertising and marketing	0%
Communication and broadcasting	0%
Government services	0%
Hotels and accommodation	0%
Logistics and distribution	0%
Printing and publishing	0%
Real Estate	0%
Telecommunications	0%
Travel and tourism	0%
Utilities and energy services	0%

## Procurement & Supplier Chain Management Software

### Essential Business Software: Procurement/SPM



Just under half, 47%, of the mining sector say that they use procurement software. This number decreases thereafter, which shows the low penetration of procurement and supply chain management software. Procurement and supply chain management software is still relatively new while the applications continue to be developed and expanded on the various available platforms <sup>4</sup>.

Industry	Percentage (%)
Mining	47%

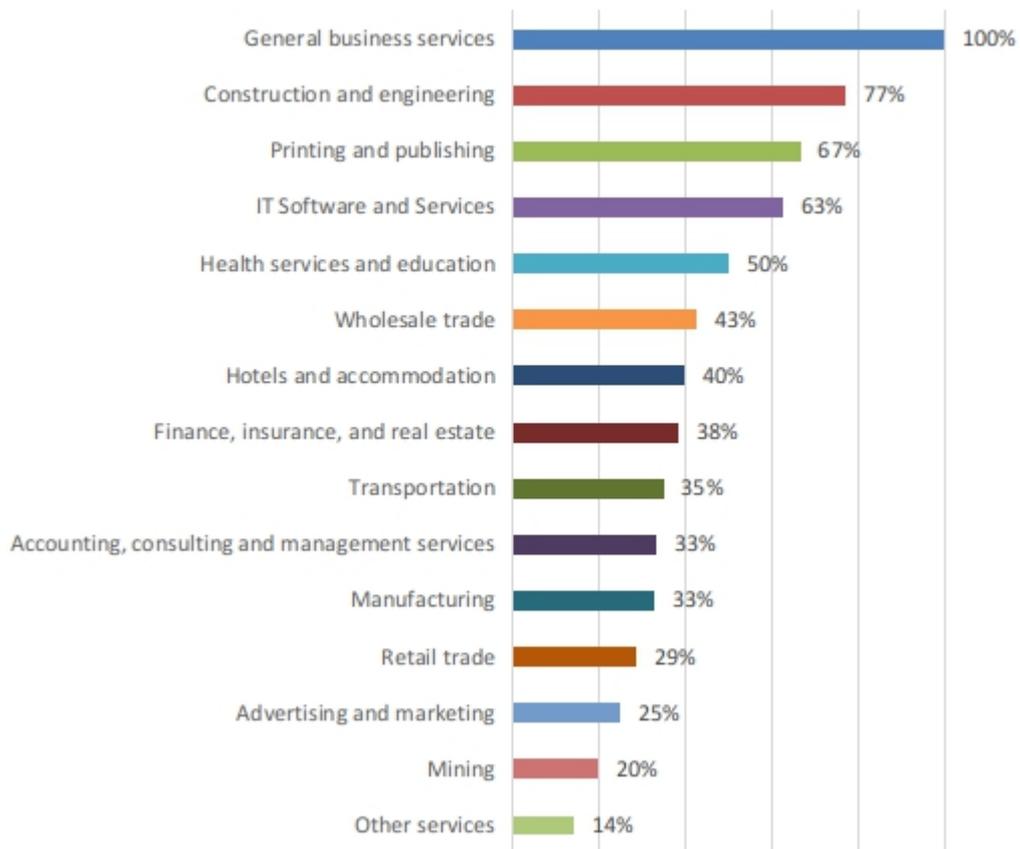
<sup>4</sup> Saxena, S. and Agarwal, D., 2018. A Critical Literature Survey on factors that Effecting E-Procurement Software. *International Journal of Advanced Research in Computer Engineering & Technology (IJARCET)*, 7(1).

Transportation	35%
Legal services	33%
Advertising and marketing	25%
Government services	25%
Wholesale trade	20%
Other services	18%
Health services and education	17%
Manufacturing	16%
IT software and services	13%
Retail trade	12%
Finance, insurance, and real estate	8%
Construction and engineering	5%
Accounting, consulting and management services	0%
Communication and broadcasting	0%
General business services	0%
Hotels and accommodation	0%
Logistics and distribution	0%
Printing and publishing	0%
Real Estate	0%
Telecommunications	0%
Travel and tourism	0%
Utilities and energy services	0%

# How Businesses Use Advanced Mobile Software

The following graphs ranks industries on proportions of businesses within an industry which make use of advanced mobile software.

Advanced mobile use of basic mobile technologies



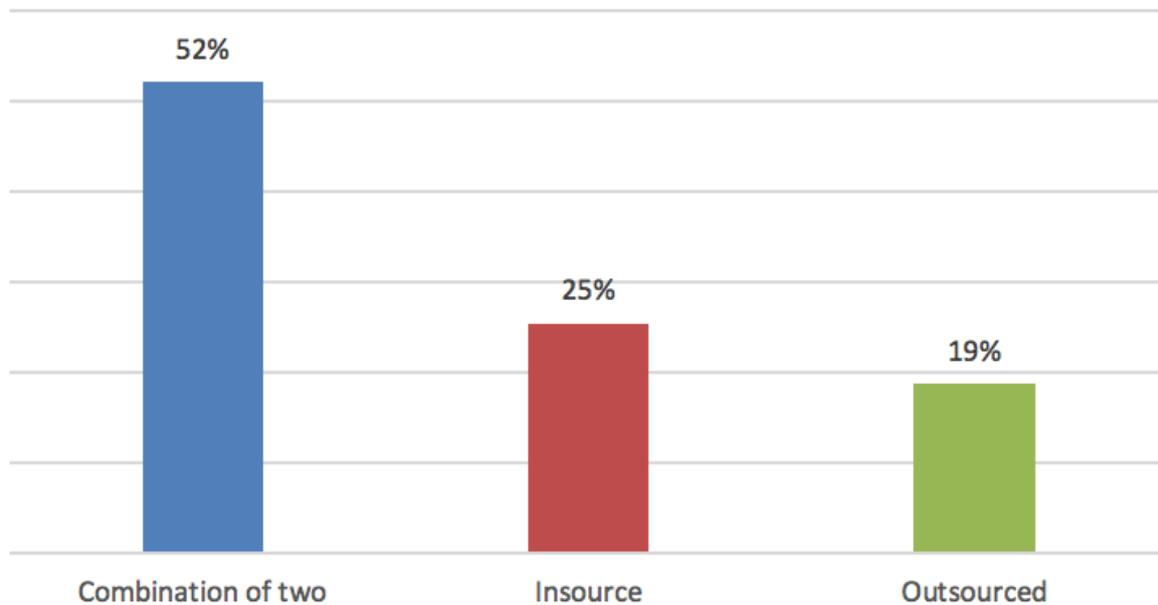
Although general business services shines with every respondent stating they make advanced use of basic mobile technologies, the trend drops off. Industry penetration remains low overall, with only five industries having over half of respondents saying they use advanced tools from basic mobile technologies.

Industry	Percentage (%)
General business services	100%
Construction and engineering	77%
Printing and publishing	67%
IT Software and Services	63%
Health services and education	50%
Wholesale trade	43%

Hotels and accommodation	40%
Finance, insurance, and real estate	38%
Transportation	35%
Accounting, consulting and management services	33%
Manufacturing	33%
Retail trade	29%
Advertising and marketing	25%
Mining	20%
Other services	14%
Communication and Broadcasting	0%
Government services	0%
Legal services	0%
Logistics & Distribution	0%
Real Estate	0%

# How ERP Software Is Procured

## Sourcing of ERP Management

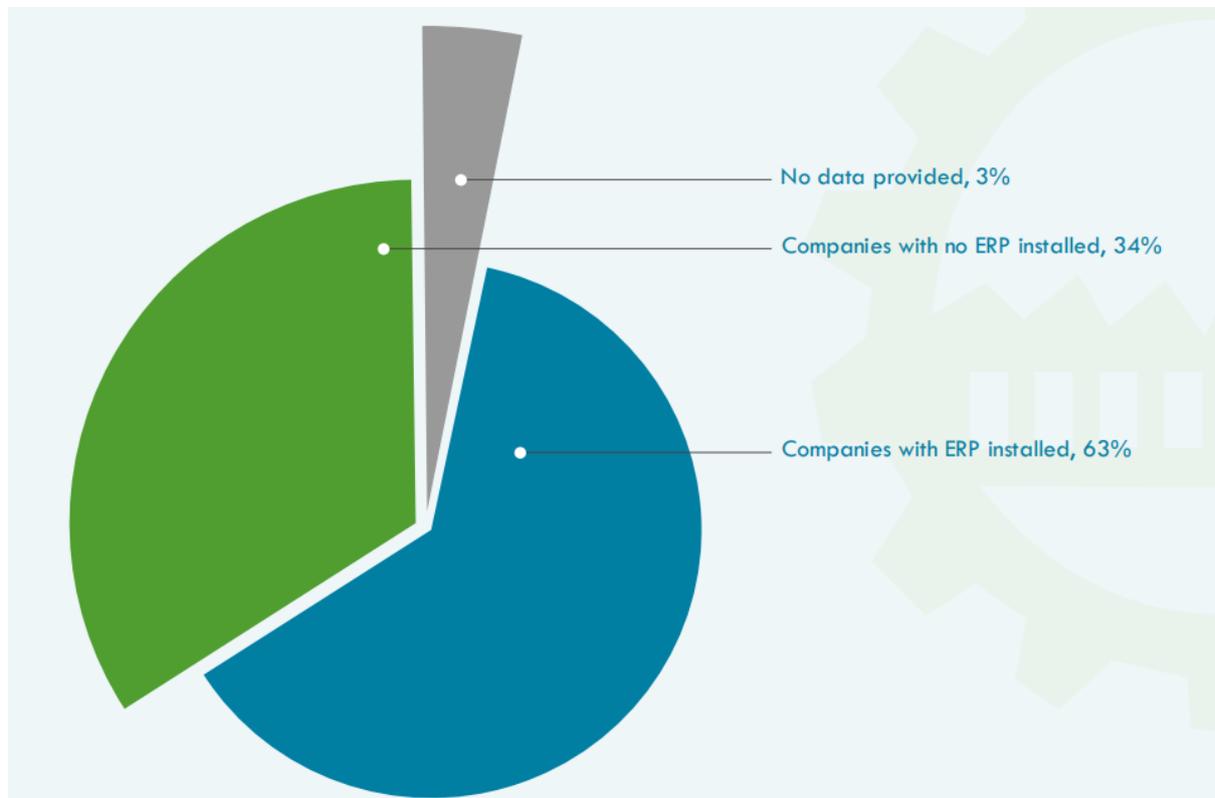


The proportion with the highest response, 52%, shows that companies source their ERP from a combination of outsourcing and insourcing. This is up from 48% last year, which shows a steady increase of movement to the ERP cloud. The combination method seems to be the most popular because businesses can ensure internal validity of their ERP records while outsourcing resource-intensive tasks which can be performed externally<sup>5</sup>.

Source	Percentage (%)
Combination	52%
Insource	25%
Outsource	19%

<sup>5</sup> Dwivedi, K. and Sharma, M., 2016. Virtual Investigation of Grouping of on Premise and Cloud ERP. *International Journal of Research and Development in Applied Science and Engineering*, 9(1).

## Companies with ERP systems - Strathmore University results

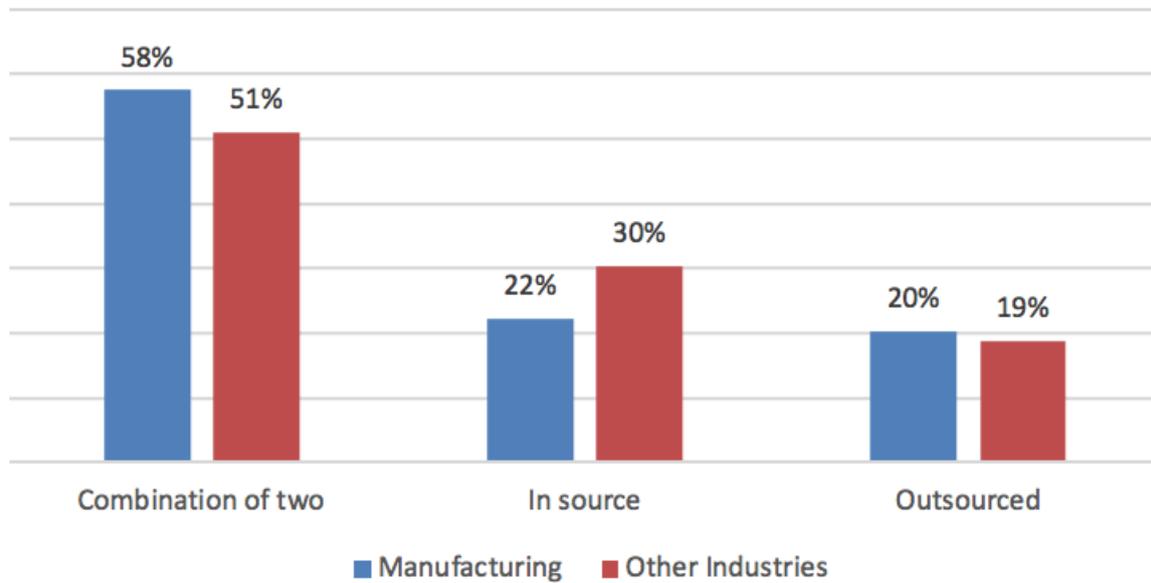


From the Strathmore sample, almost two thirds (63%) of companies used ERP systems.

<b>Response</b>	<b>Percentage (%)</b>
Companies with ERP installed	63%
Companies with no ERP installed	34%
No response	3%

## How ERP Software Is Procured, Split by Manufacturing and Other Industries

Sourcing of ERP Management

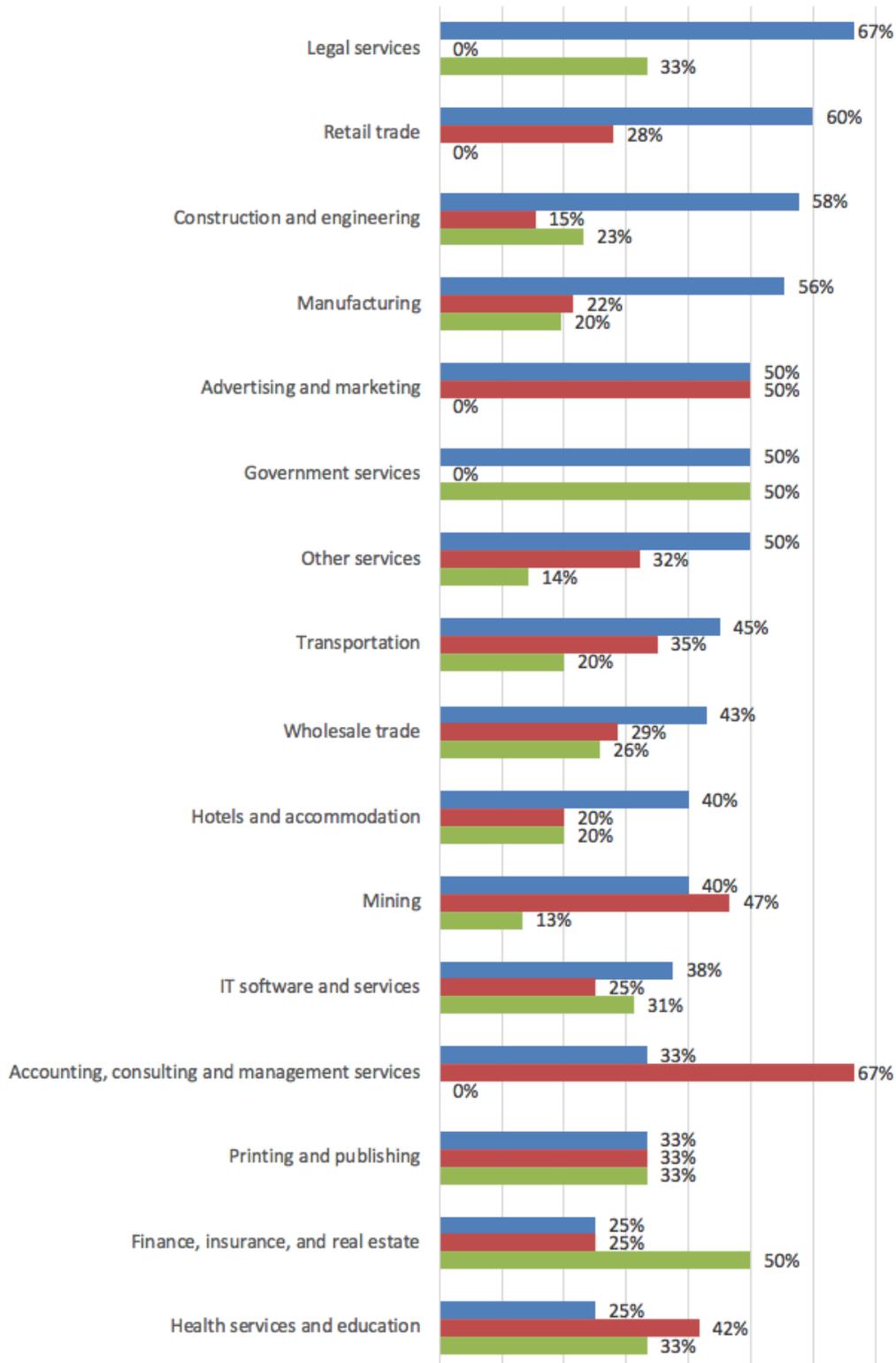


When split by industry, the manufacturing sector is more advanced with implementing combined ERP solutions, as well as scaling down legacy in-sourced solutions.

Source	Manufacturing	Other Industries
Combination of two	58%	51%
In source	22%	30%
Outsourced	20%	19%

## Source of ERP Management Software, by Industry

Source of ERP Software

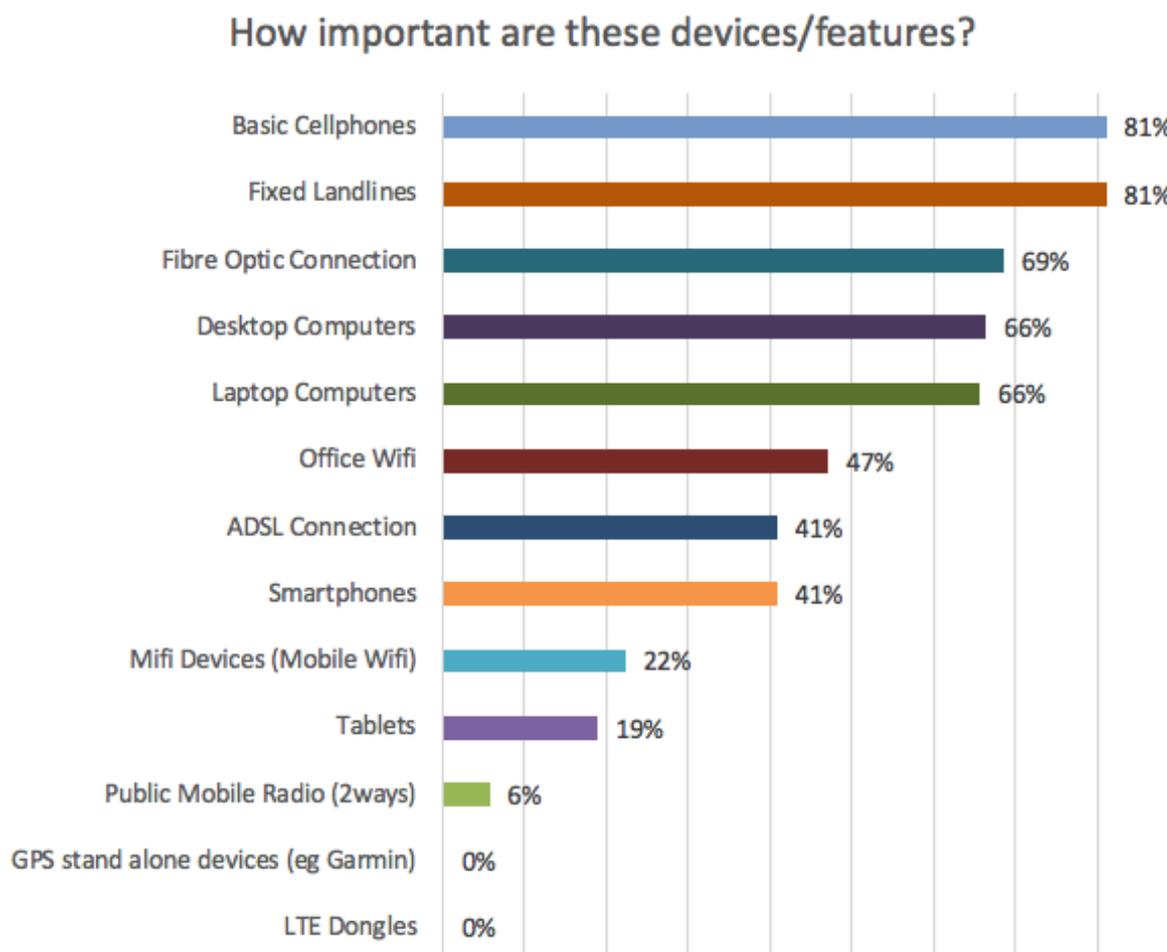


Industry	Combination	Insource	Outsource
Communication and broadcasting	100%	0%	0%

General business services	100%	0%	0%
Logistics and distribution	100%	0%	0%
Real Estate	100%	0%	0%
Telecommunications	100%	0%	0%
Travel and tourism	100%	0%	0%
Utilities and energy services	100%	0%	0%
Legal services	67%	0%	33%
Retail trade	60%	28%	0%
Construction and engineering	58%	15%	23%
Manufacturing	56%	22%	20%
Advertising and marketing	50%	50%	0%
Government services	50%	0%	50%
Other services	50%	32%	14%
Transportation	45%	35%	20%
Wholesale trade	43%	29%	26%
Hotels and accommodation	40%	20%	20%
Mining	40%	47%	13%
IT software and services	38%	25%	31%
Accounting, consulting and management services	33%	67%	0%
Printing and publishing	33%	33%	33%
Finance, insurance, and real estate	25%	25%	50%
Health services and education	25%	42%	33%

## Importance of Technologies

Companies were asked to rate the importance of various technologies on a likert scale, where 1 represented “Very unimportant” and 5 represented “Very important”. The graph below shows the percentage of respondents who indicated that a particular technology was either important or very important for their company.



The vast majority of respondents, 81%, say basic cellphones and fixed landlines are important overall, 4 or 5 importance. This shows the strong need for voice communication in corporate environments. Another interesting finding is fibre optic connections being considered to be nearly twice as important as ADSL connection.

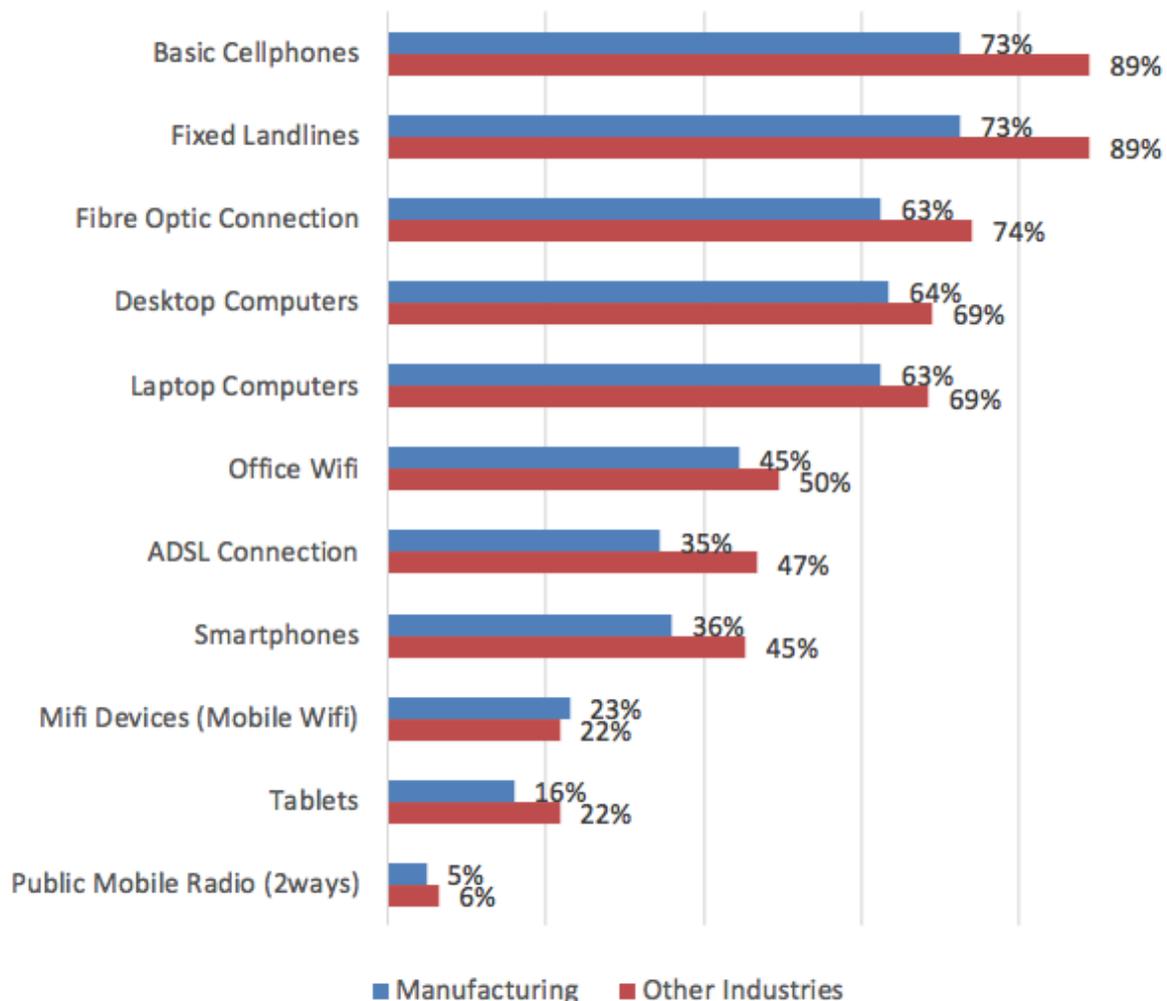
How important are these devices/features?	Manufacturing
Basic Cellphones	73%
Fixed Landlines	73%
Fibre Optic Connection	63%

Desktop Computers	64%
Laptop Computers	63%
Office Wifi	45%
ADSL Connection	35%
Smartphones	36%
Mifi Devices (Mobile Wifi)	23%
Tablets	16%
Public Mobile Radio (2ways)	5%

## Importance of Technologies, split by manufacturing

The companies were then split by manufacturing and non-manufacturing to gain a sense where these technologies have more uptake.

### How important are these devices/features?



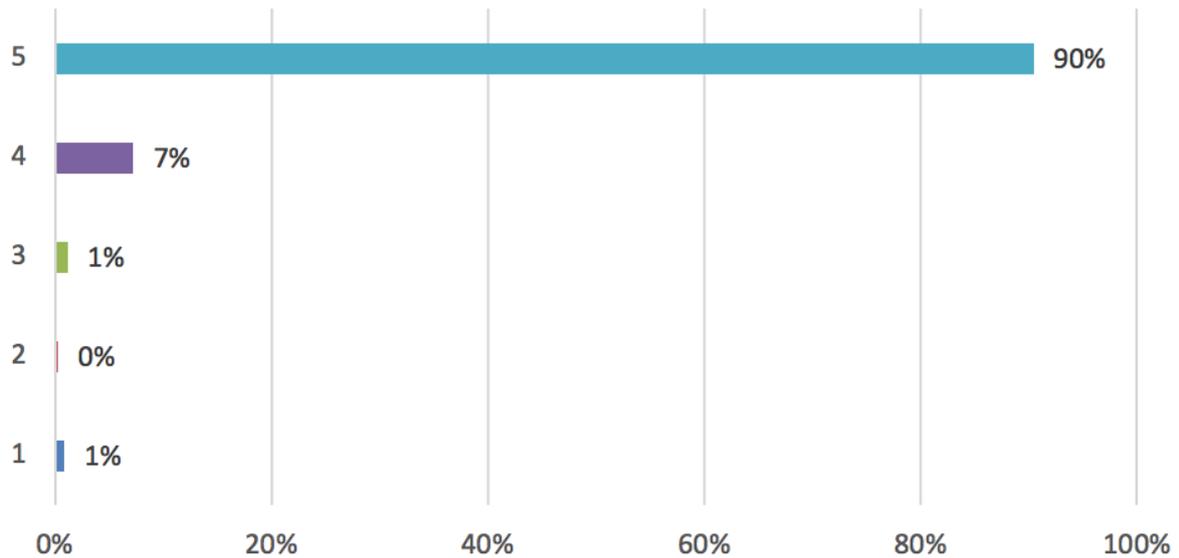
Nearly every device or feature is more important to other industries, which shows the manufacturing sector places less importance on these devices.

How important are these devices/features?	Manufacturing	Other Industries
Basic Cellphones	73%	89%
Fixed Landlines	73%	89%
Fibre Optic Connection	63%	74%

Desktop Computers	64%	69%
Laptop Computers	63%	69%
Office Wifi	45%	50%
ADSL Connection	35%	47%
Smartphones	36%	45%
Mifi Devices (Mobile Wifi)	23%	22%
Tablets	16%	22%
Public Mobile Radio (2ways)	5%	6%

## Basic Cellphones

### Importance of Basic Cellphones

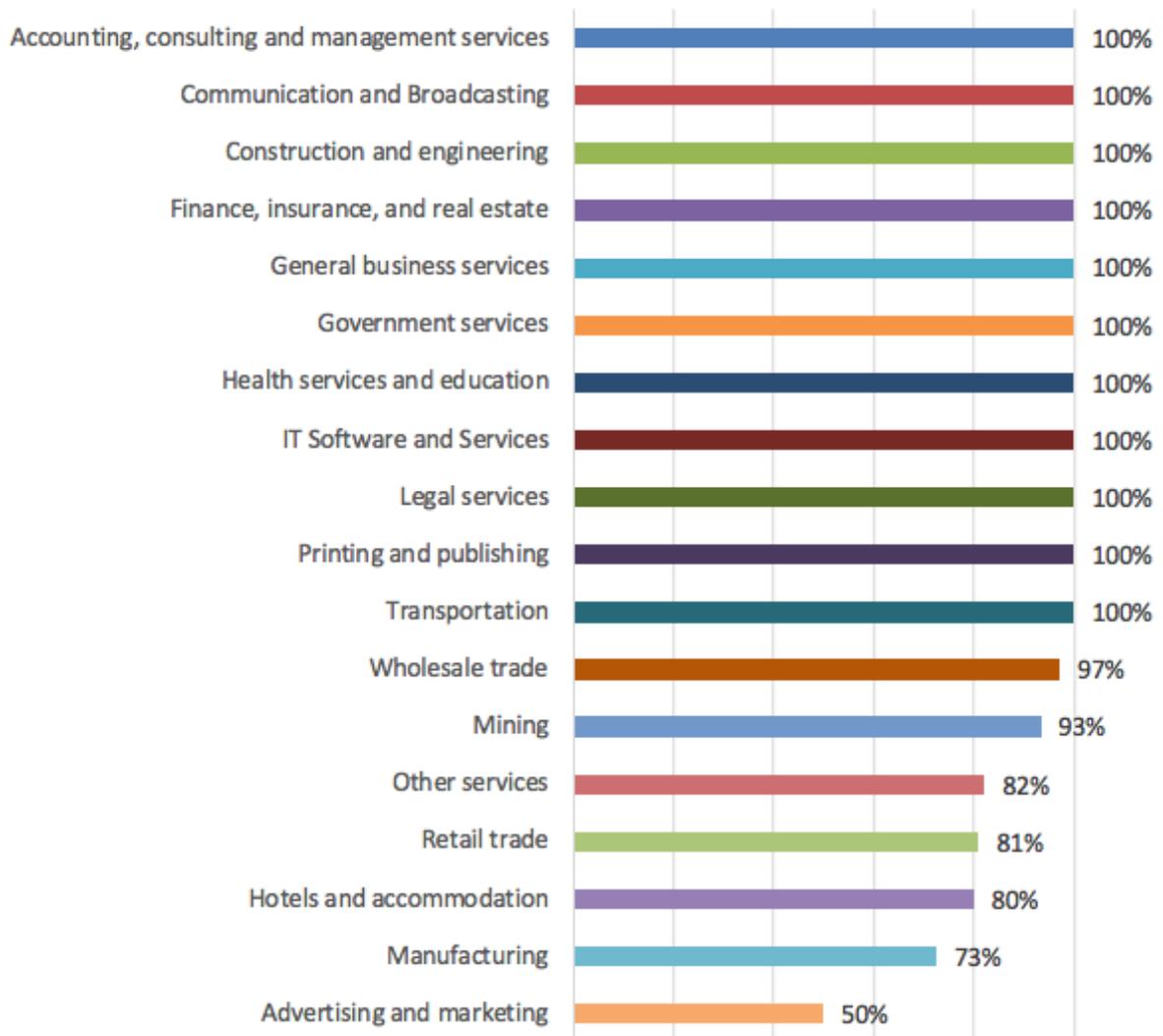


A significant proportion, 90%, of respondents say that having basic cellphones is very important. This shows the strong need for voice communication in corporate environments.

Importance	Respondents (%)
1	1%
2	0%
3	1%
4	7%
5	90%

## Basic Cellphones, by Industry

### Basic Cellphones



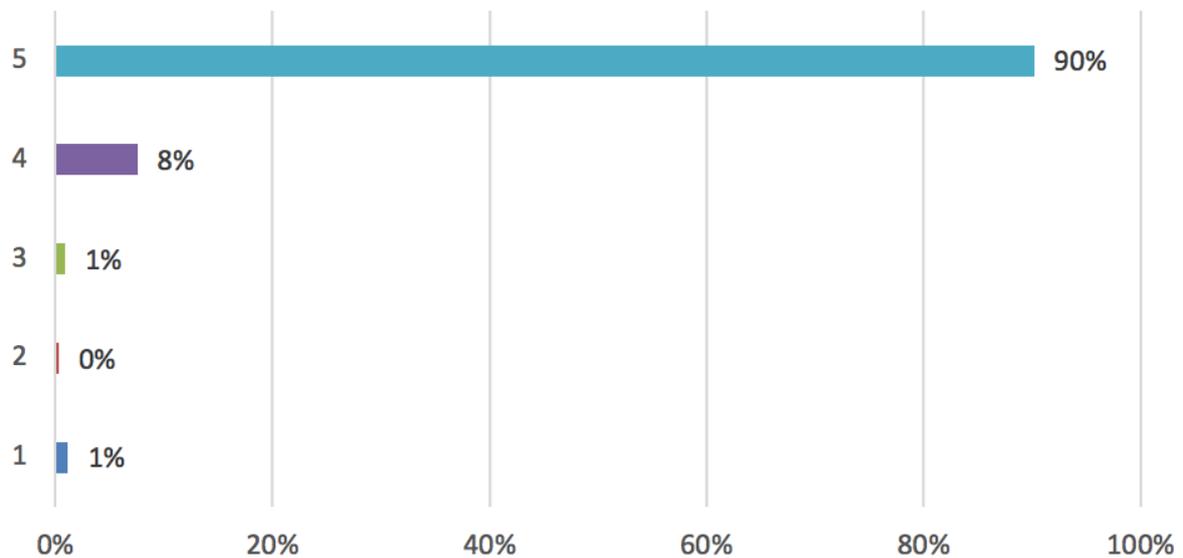
Every respondent from eleven industries consider basic cellphones to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
Accounting, consulting and management services	100%
Communication and Broadcasting	100%
Construction and engineering	100%
Finance, insurance, and real estate	100%
General business services	100%
Government services	100%

Health services and education	100%
IT Software and Services	100%
Legal services	100%
Printing and publishing	100%
Transportation	100%
Wholesale trade	97%
Mining	93%
Other services	82%
Retail trade	81%
Hotels and accommodation	80%
Manufacturing	73%
Advertising and marketing	50%
Logistics & Distribution	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## Fixed Landlines

### Importance of Fixed Landlines

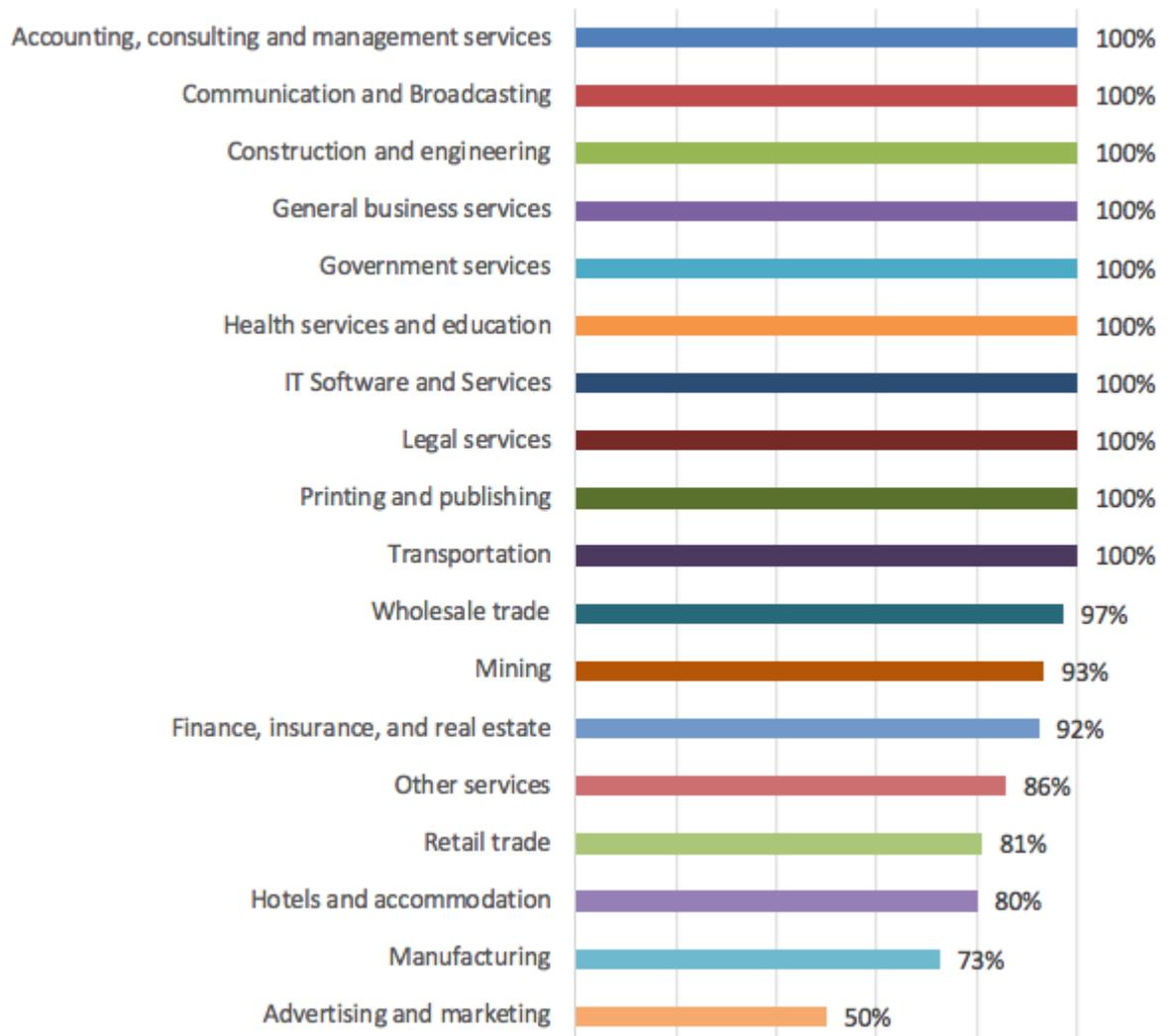


A significant proportion, 90%, of respondents say that having fixed landlines is very important. As shown in the previous section, this shows the strong need for voice communication in corporate environments.

Importance	Respondents (%)
1	1%
2	0%
3	1%
4	8%
5	90%

## Fixed Landlines, by Industry

### Fixed Landlines



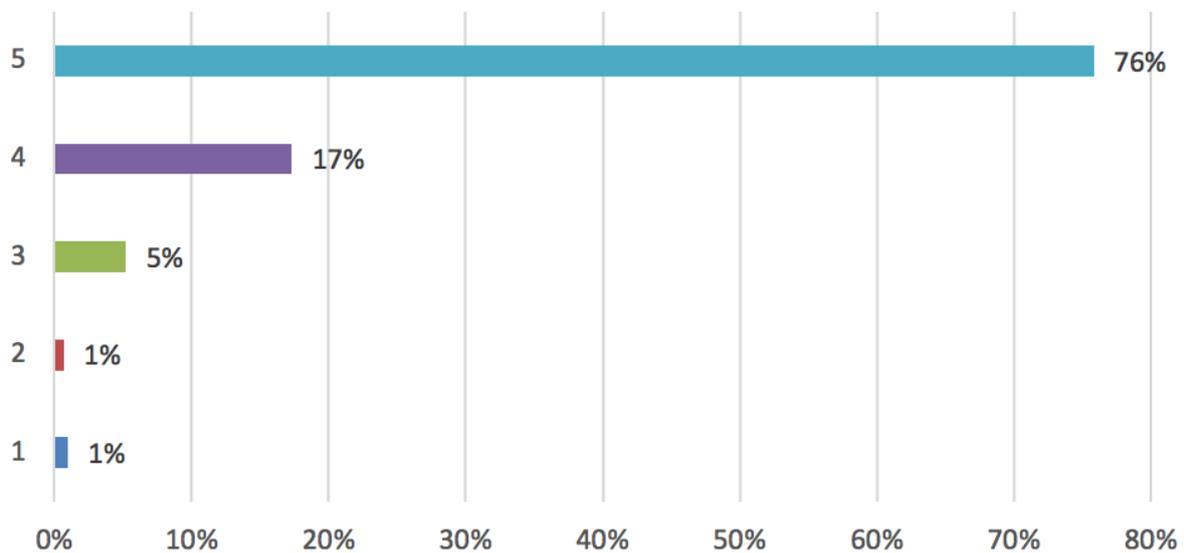
As with basic cellphones, every respondent from ten industries consider basic cellphones to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
Accounting, consulting and management services	100%
Communication and Broadcasting	100%
Construction and engineering	100%
General business services	100%
Government services	100%

Health services and education	100%
IT Software and Services	100%
Legal services	100%
Printing and publishing	100%
Transportation	100%
Wholesale trade	97%
Mining	93%
Finance, insurance, and real estate	92%
Other services	86%
Retail trade	81%
Hotels and accommodation	80%
Manufacturing	73%
Advertising and marketing	50%
Logistics & Distribution	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## Fibre Optic Connection

### Importance of Fibre Optic Connection

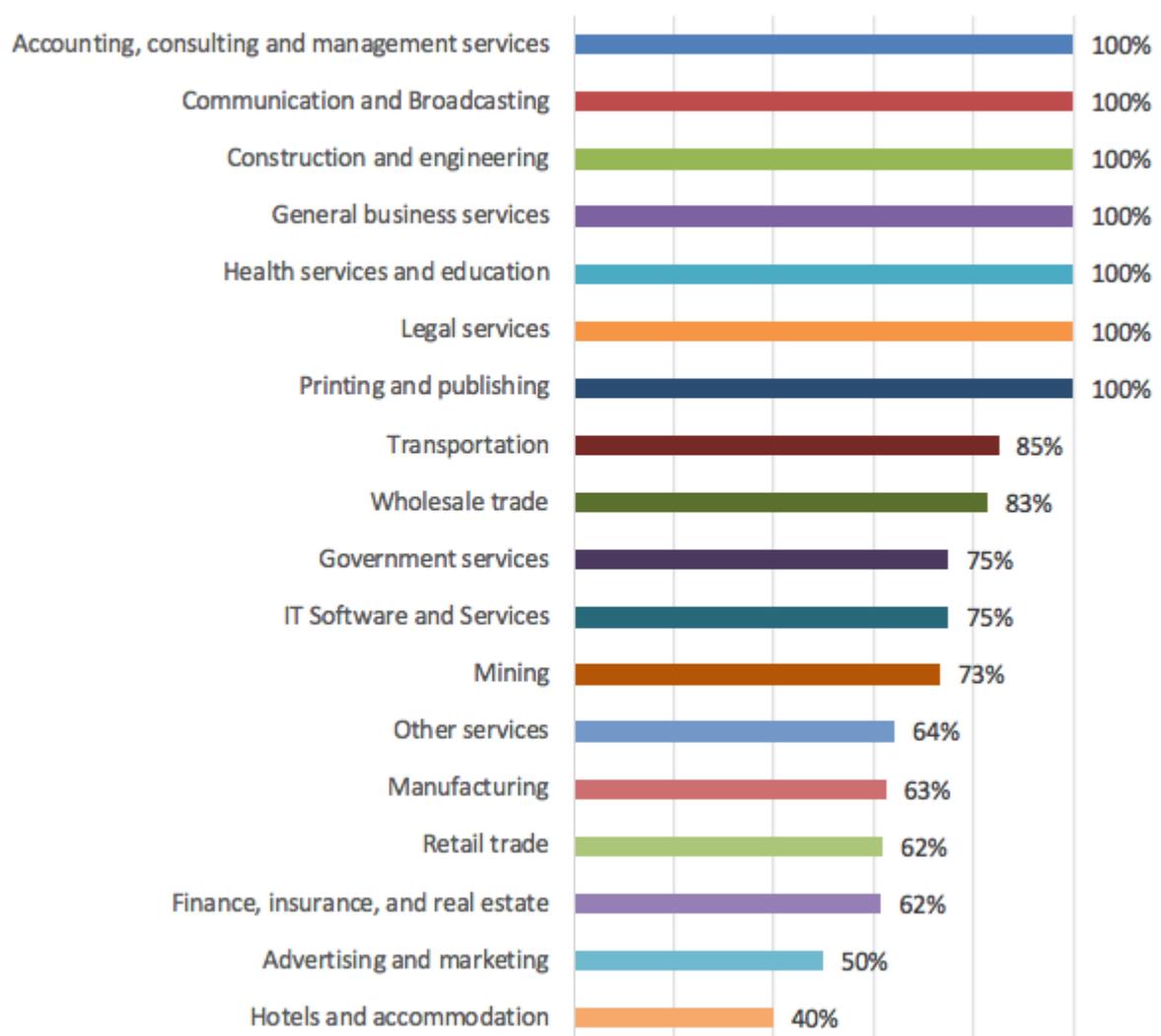


A significant proportion, 76%, of respondents say that having fibre to the office is very important. Reflecting what was said earlier, fibre to the office is favoured more now than ADSL.

Importance	Respondents (%)
1	1%
2	1%
3	5%
4	17%
5	76%

## Fibre Optic Connection, by Industry

### Fibre Optic Connection

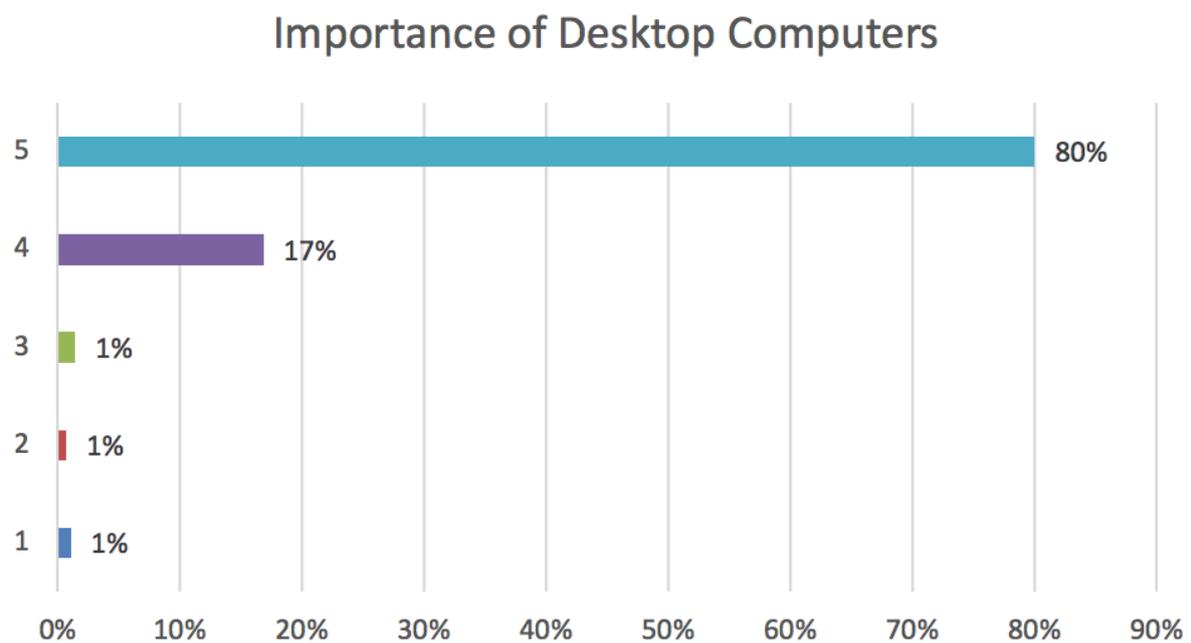


Every respondent from seven industries consider fibre to the office to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
Accounting, consulting and management services	100%
Communication and Broadcasting	100%
Construction and engineering	100%
General business services	100%
Health services and education	100%
Legal services	100%

Printing and publishing	100%
Transportation	85%
Wholesale trade	83%
Government services	75%
IT Software and Services	75%
Mining	73%
Other services	64%
Manufacturing	63%
Retail trade	62%
Finance, insurance, and real estate	62%
Advertising and marketing	50%
Hotels and accommodation	40%
Logistics & Distribution	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

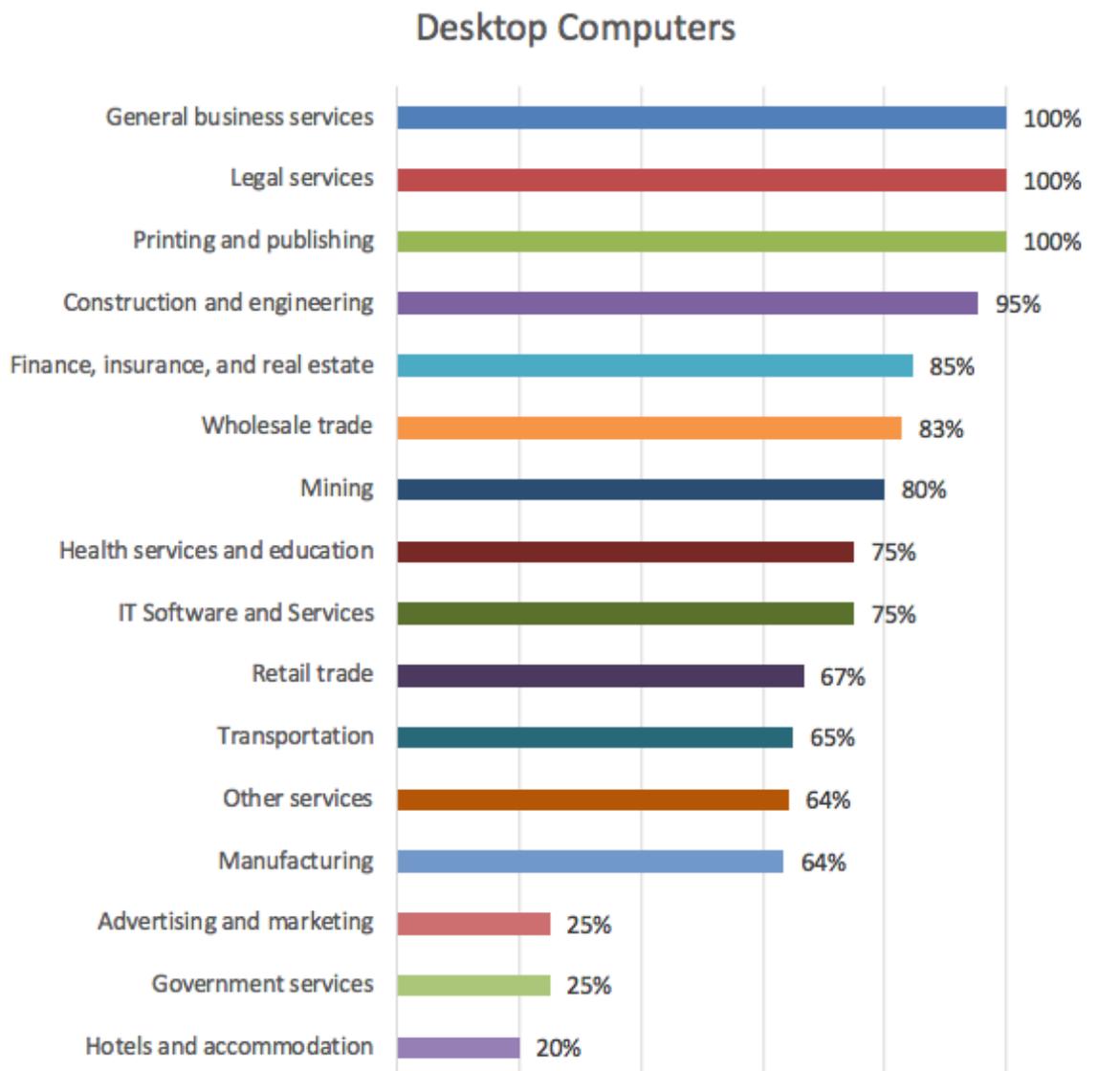
## Desktop Computers



Desktop computers were ranked as important hardware overall by 80% of respondents. Reaching a business is traditionally done via a landline number, which. Desktop computers are currently and have been the option of choice for computing for corporates. This trend will be mostly the same for the foreseeable future.

Importance	Respondents (%)
1	1%
2	1%
3	1%
4	17%
5	80%

## Desktop Computers, by Industry



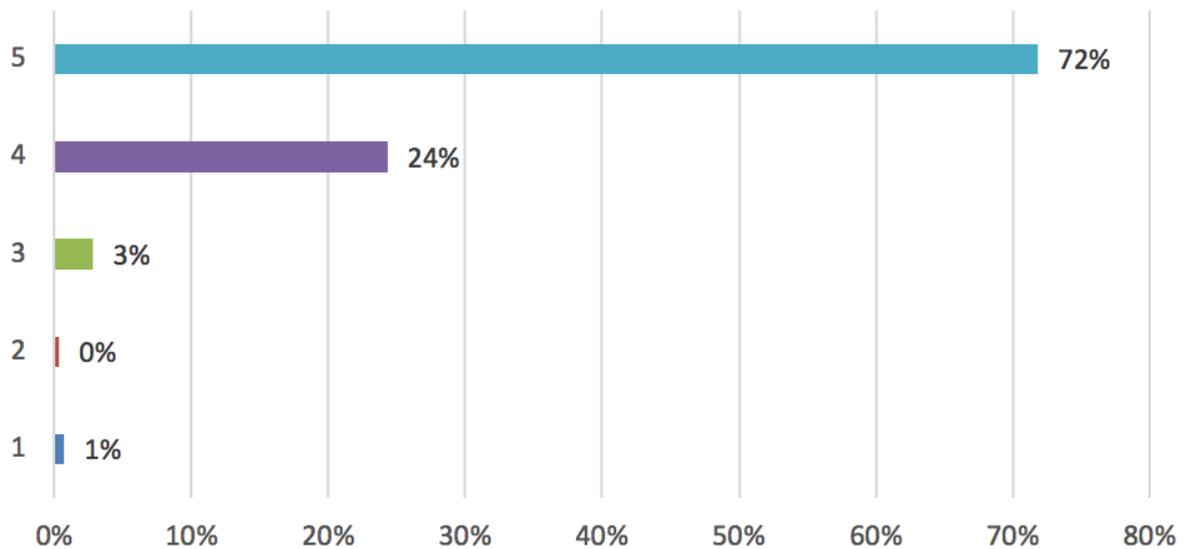
Every respondent from three industries consider desktop computers to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
General business services	100%
Legal services	100%
Printing and publishing	100%
Construction and engineering	95%
Finance, insurance, and real estate	85%
Wholesale trade	83%

Mining	80%
Health services and education	75%
IT Software and Services	75%
Retail trade	67%
Transportation	65%
Other services	64%
Manufacturing	64%
Advertising and marketing	25%
Government services	25%
Hotels and accommodation	20%
Accounting, consulting and management services	0%
Communication and Broadcasting	0%
Logistics & Distribution	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## Laptop Computers

### Importance of Laptop Computers

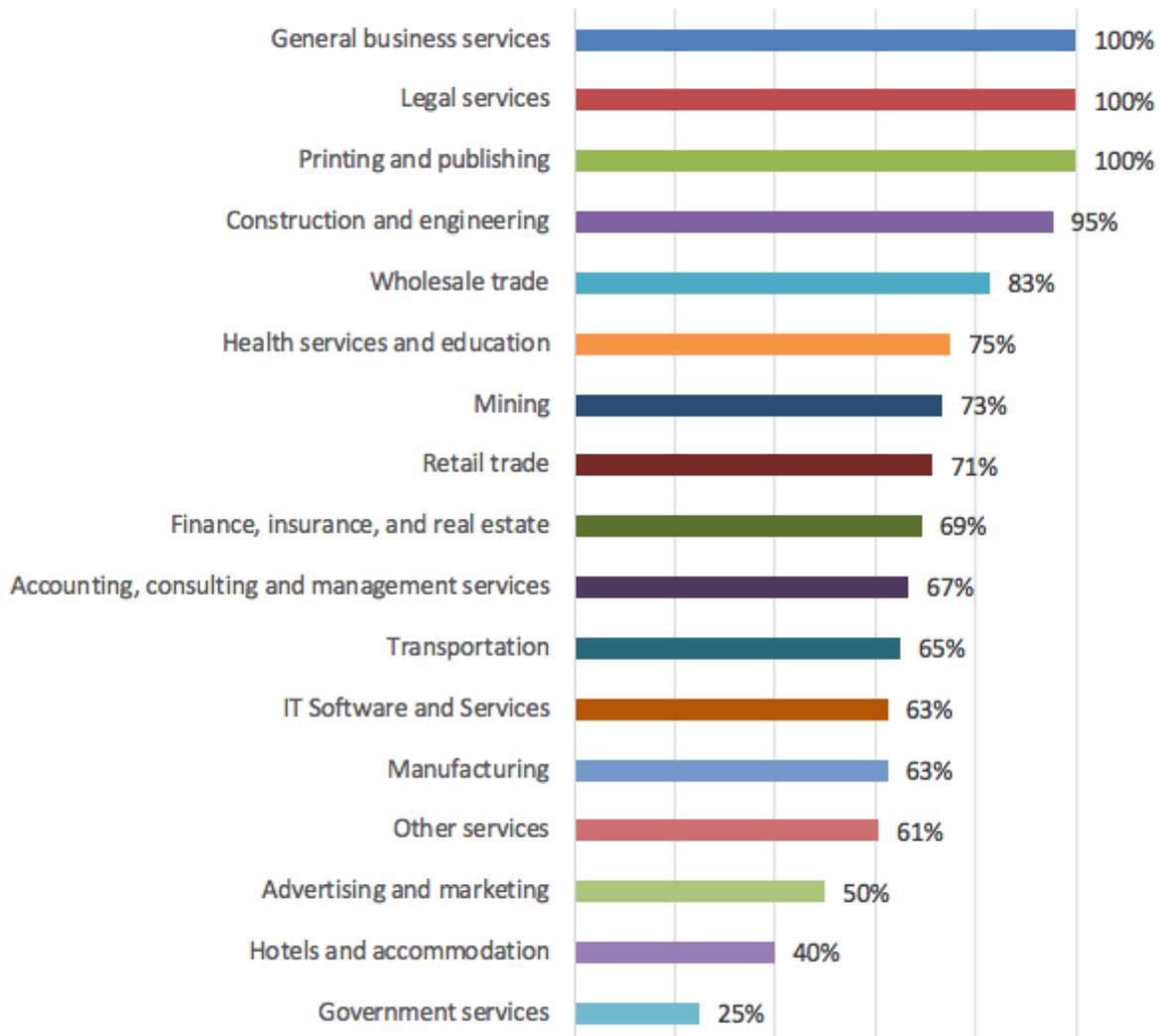


The proportion with the highest response, 72%, say that using laptop computers is very important. Laptop computers, sharing a similar level of importance to desktop computers, have been popular in the corporate space as they allow for work to travel as the employee travels.

Importance	Respondents (%)
1	1%
2	0%
3	3%
4	24%
5	72%

## Laptop Computers, by Industry

### Laptop Computers



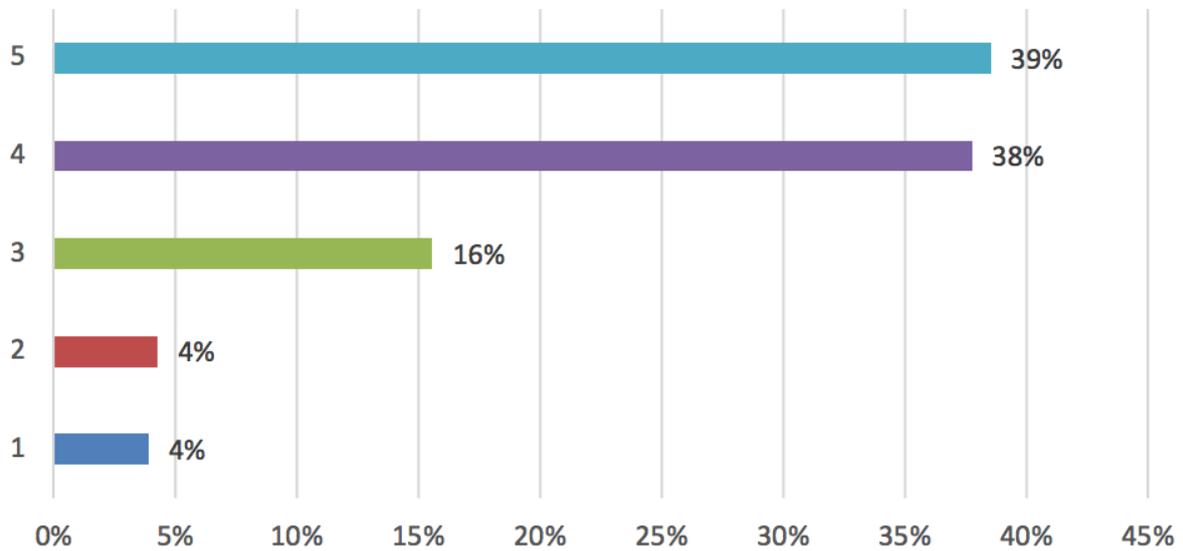
Every respondent from three industries consider laptop computers to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
General business services	100%
Legal services	100%
Printing and publishing	100%
Construction and engineering	95%
Wholesale trade	83%
Health services and education	75%

Mining	73%
Retail trade	71%
Finance, insurance, and real estate	69%
Accounting, consulting and management services	67%
Transportation	65%
IT Software and Services	63%
Manufacturing	63%
Other services	61%
Advertising and marketing	50%
Hotels and accommodation	40%
Government services	25%
Communication and Broadcasting	0%
Logistics & Distribution	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## Office Wi-Fi

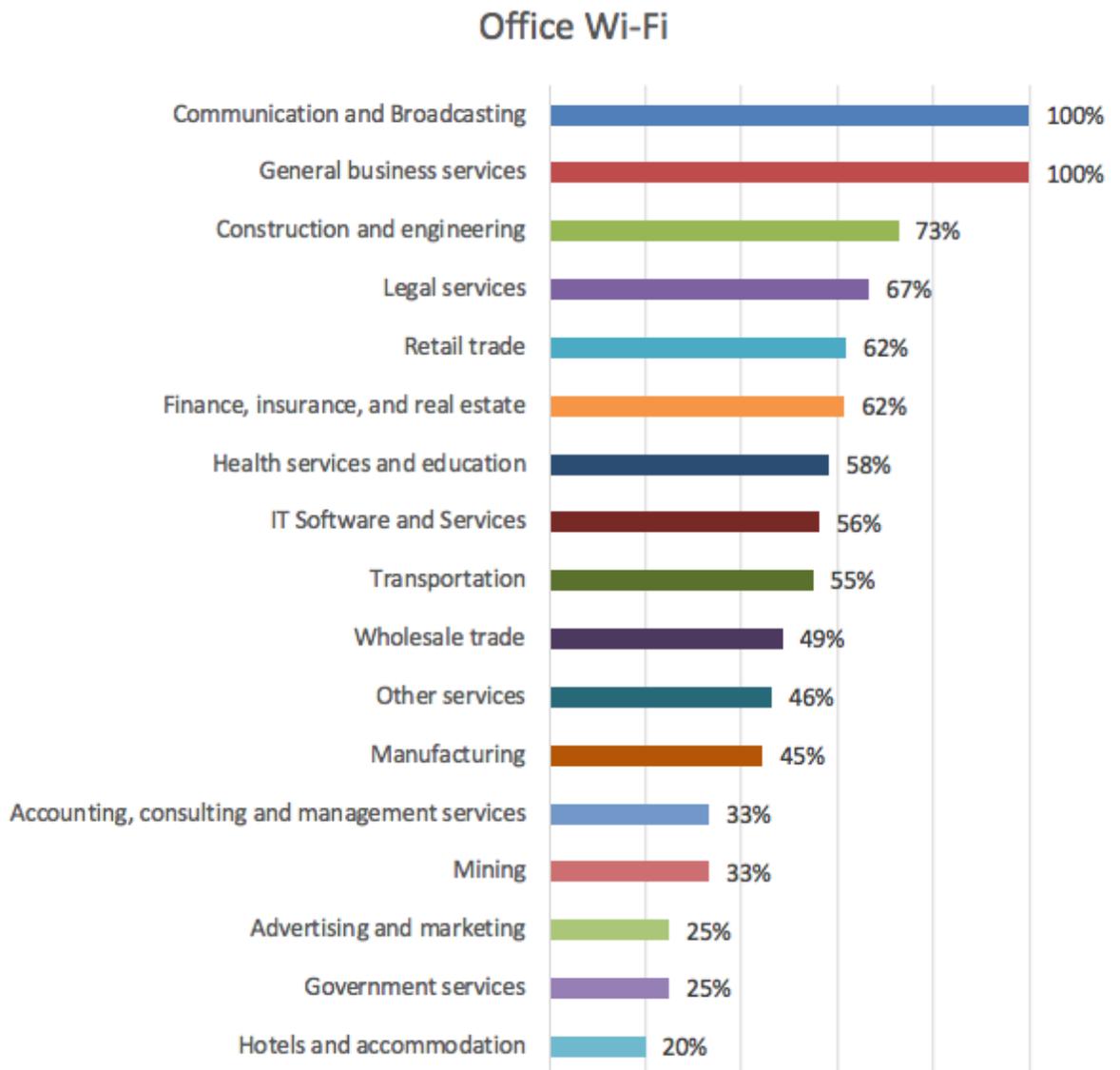
### Importance of Office Wifi



Office Wi-Fi is ranked low in high importance, at 39%, but overall important at 77%. This technology is in competition with other mobile connectivity solutions, like 3G/4G solutions in smartphones that can tether to laptop computers and Mi-Fi (Mobile Wi-Fi) connections.

Importance	Respondents (%)
1	4%
2	4%
3	16%
4	38%
5	39%

## Office Wi-Fi, by Industry



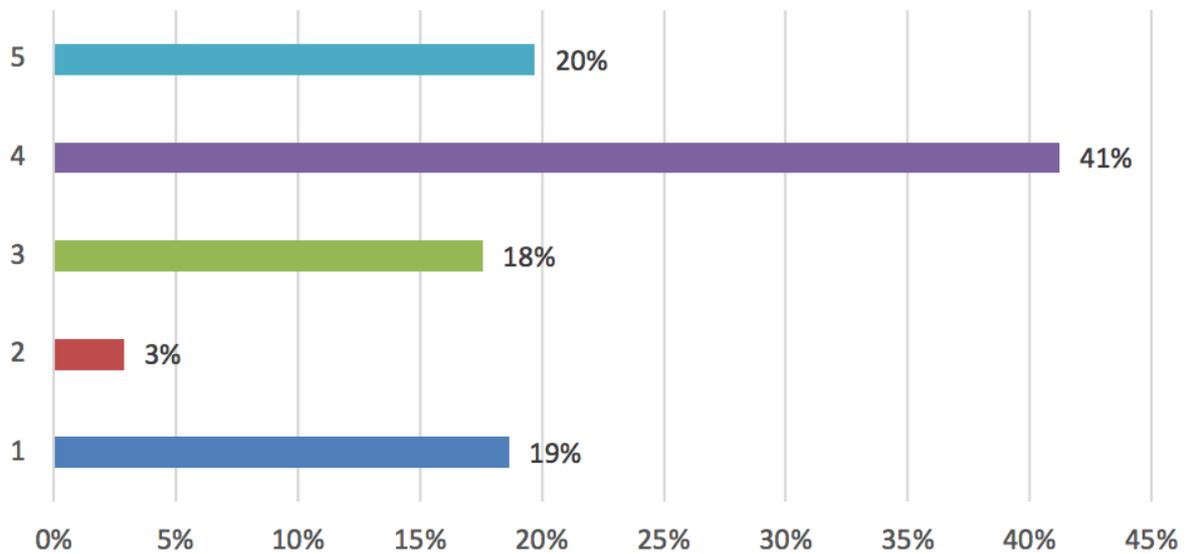
Every respondent from two industries consider office Wi-Fi to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
Communication and Broadcasting	100%
General business services	100%
Construction and engineering	73%
Legal services	67%
Retail trade	62%
Finance, insurance, and real estate	62%

Health services and education	58%
IT Software and Services	56%
Transportation	55%
Wholesale trade	49%
Other services	46%
Manufacturing	45%
Accounting, consulting and management services	33%
Mining	33%
Advertising and marketing	25%
Government services	25%
Hotels and accommodation	20%
Logistics & Distribution	0%
Printing and publishing	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## ADSL Connection

### Importance of ADSL Connection

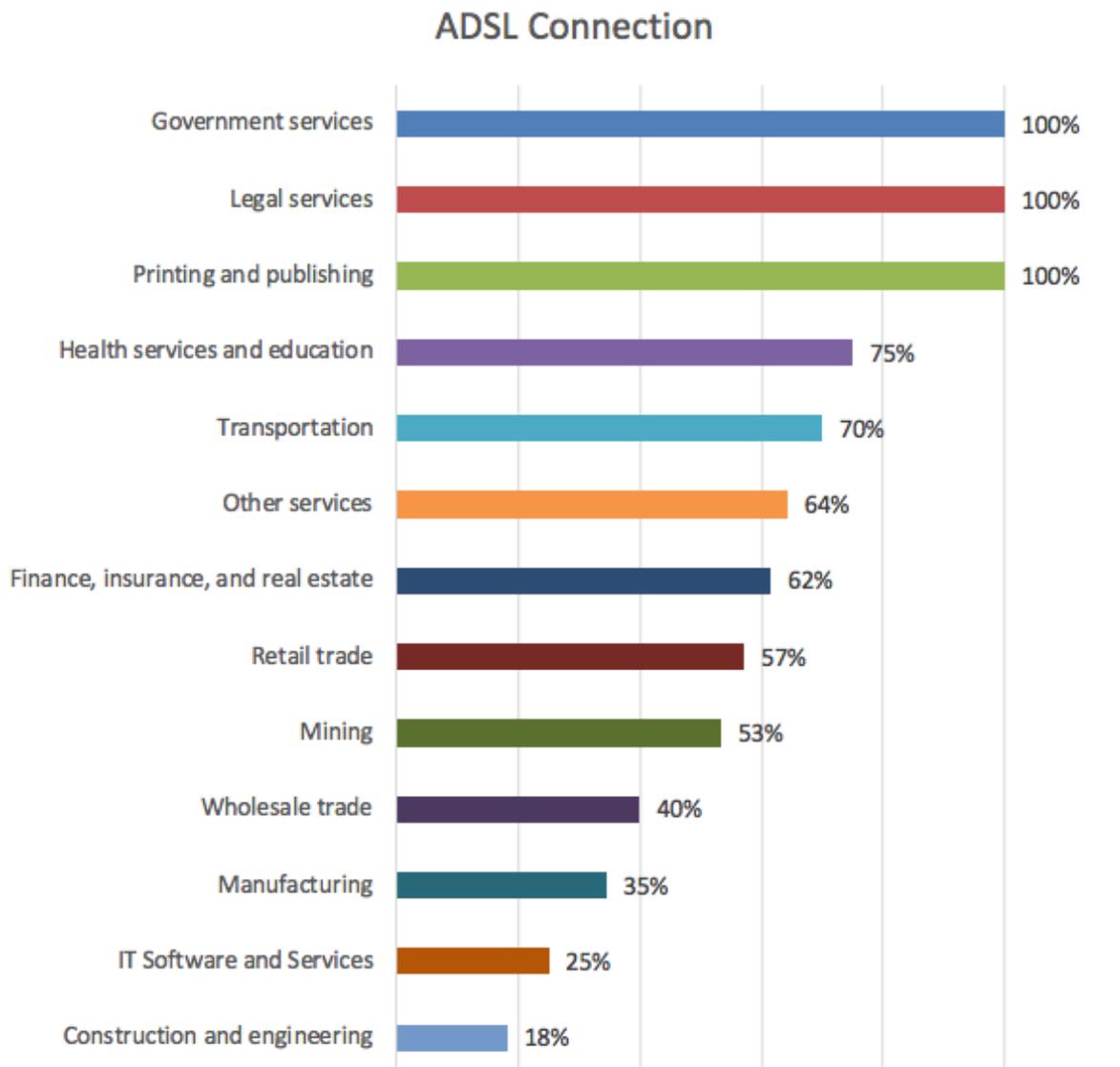


The highest proportion, 41%, of respondents say ADSL connections are important. ADSL connections are headed the same route as ISDN and dial-up did in the early 2000's, as fibre to the office becomes an increasingly popular method of connecting to the internet <sup>6</sup>.

Importance	Respondents (%)
1	19%
2	3%
3	18%
4	41%
5	20%

<sup>6</sup> Internet Access in South Africa 2017 Report, Available at [<http://www.worldwideworx.com/internet2017/>]

## ADSL Connection, by Industry



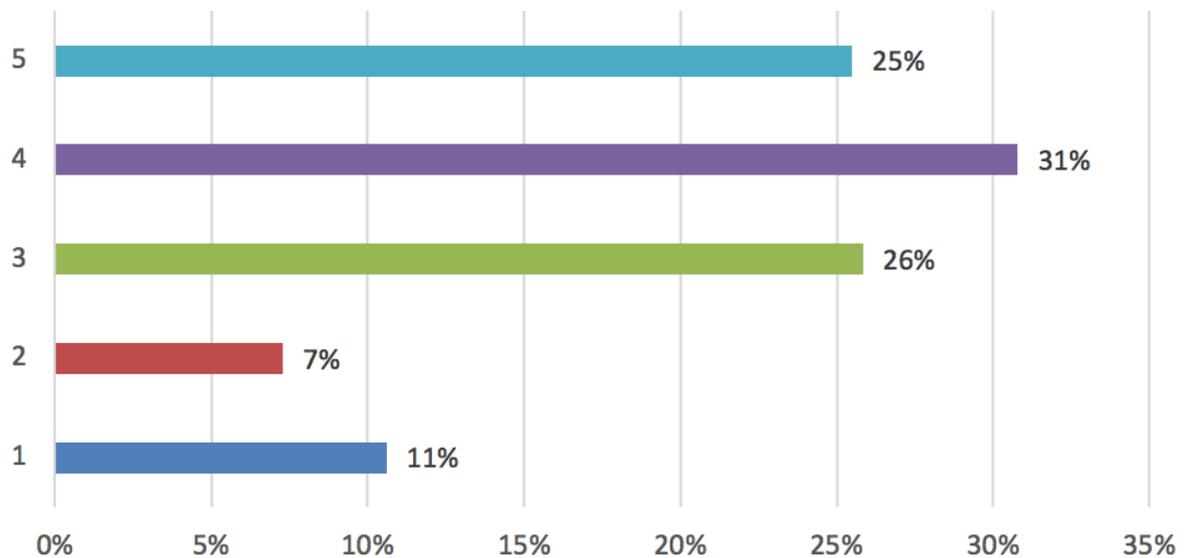
Every respondent from two industries consider ADSL connection to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
Government services	100%
Legal services	100%
Printing and publishing	100%
Health services and education	75%
Transportation	70%
Other services	64%

Finance, insurance, and real estate	62%
Retail trade	57%
Mining	53%
Wholesale trade	40%
Manufacturing	35%
IT Software and Services	25%
Construction and engineering	18%
Accounting, consulting and management services	0%
Advertising and marketing	0%
Communication and Broadcasting	0%
General business services	0%
Hotels and accommodation	0%
Logistics & Distribution	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## Smartphones

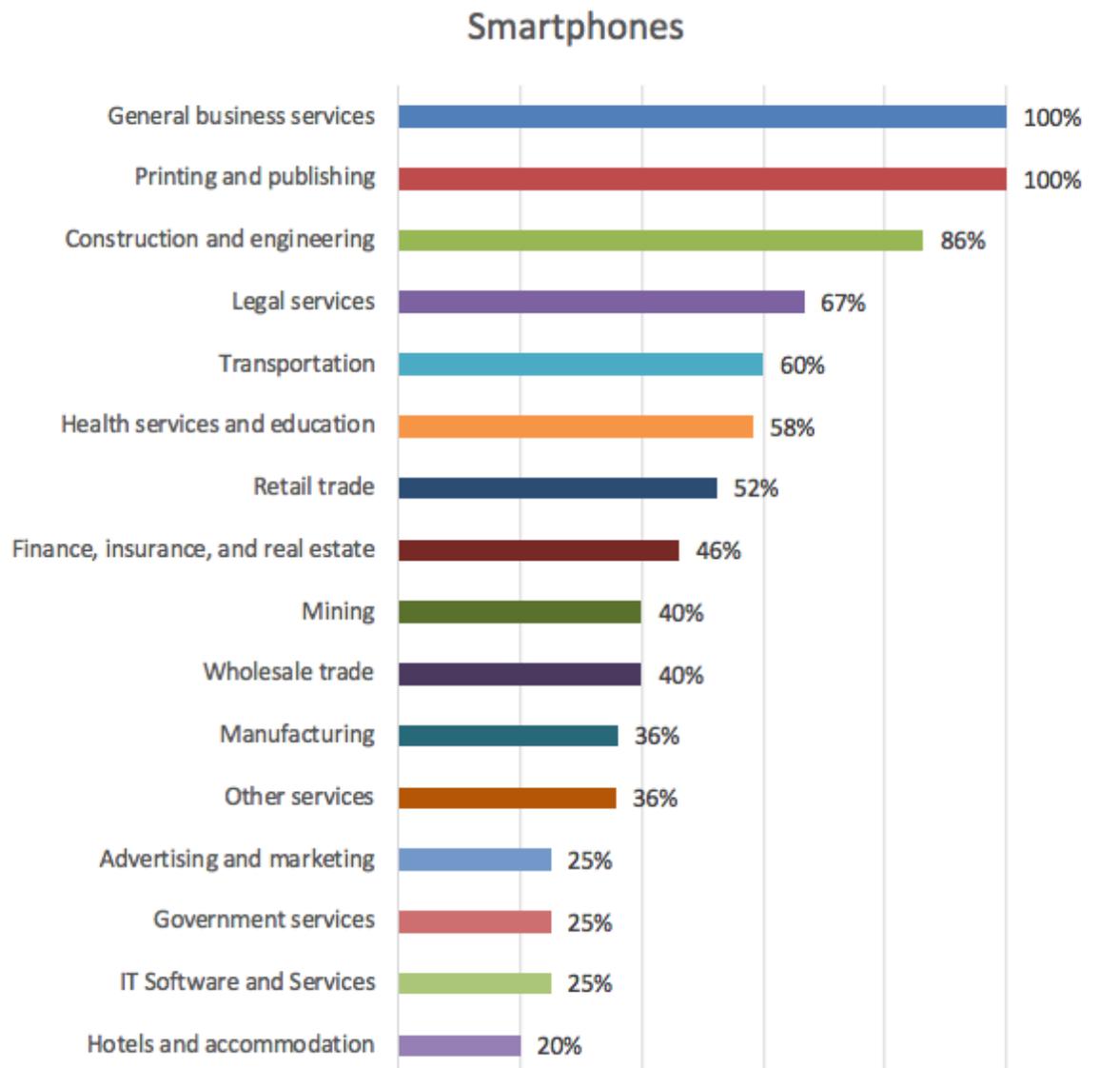
### Importance of Smartphones



The largest proportion, 31%, of respondents say that having smartphones is important, followed by 'neither important nor unimportant at 26%. Smartphones have received a mixed response, indicating that corporates are not aware of the benefits smartphones provide.

Importance	Respondents (%)
1	11%
2	7%
3	26%
4	31%
5	25%

## Smartphones, by Industry



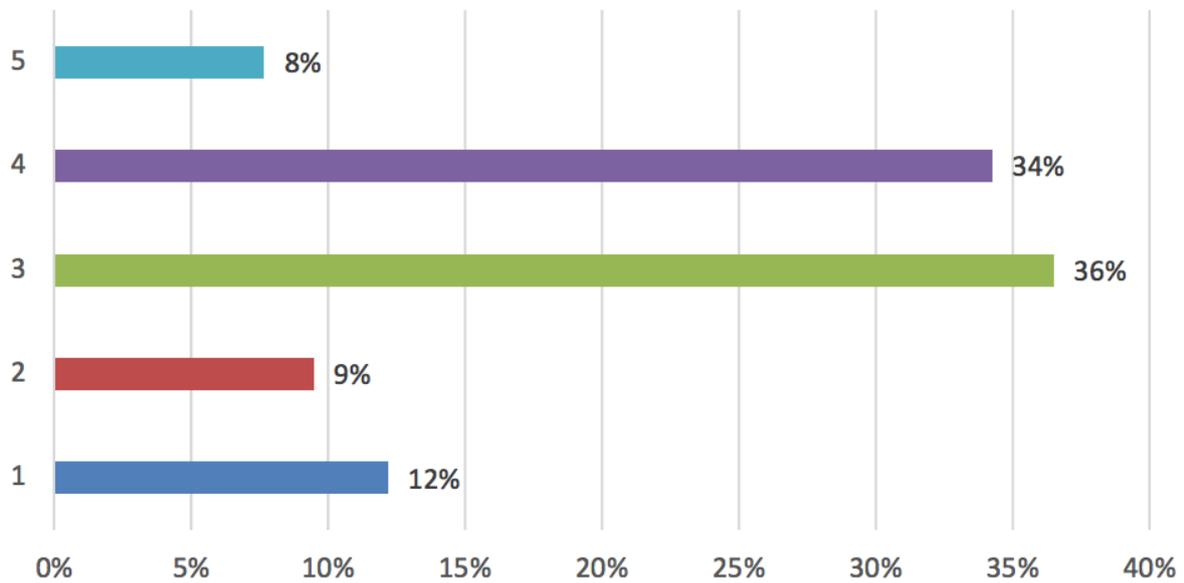
Every respondent from two industries (general business services, and printing and publishing) consider smartphones to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
General business services	100%
Printing and publishing	100%
Construction and engineering	86%
Legal services	67%
Transportation	60%
Health services and education	58%

Retail trade	52%
Finance, insurance, and real estate	46%
Mining	40%
Wholesale trade	40%
Manufacturing	36%
Other services	36%
Advertising and marketing	25%
Government services	25%
IT Software and Services	25%
Hotels and accommodation	20%
Accounting, consulting and management services	0%
Communication and Broadcasting	0%
Logistics & Distribution	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## Mi-Fi Devices

Importance of Mifi Devices (Mobile Wi-Fi)

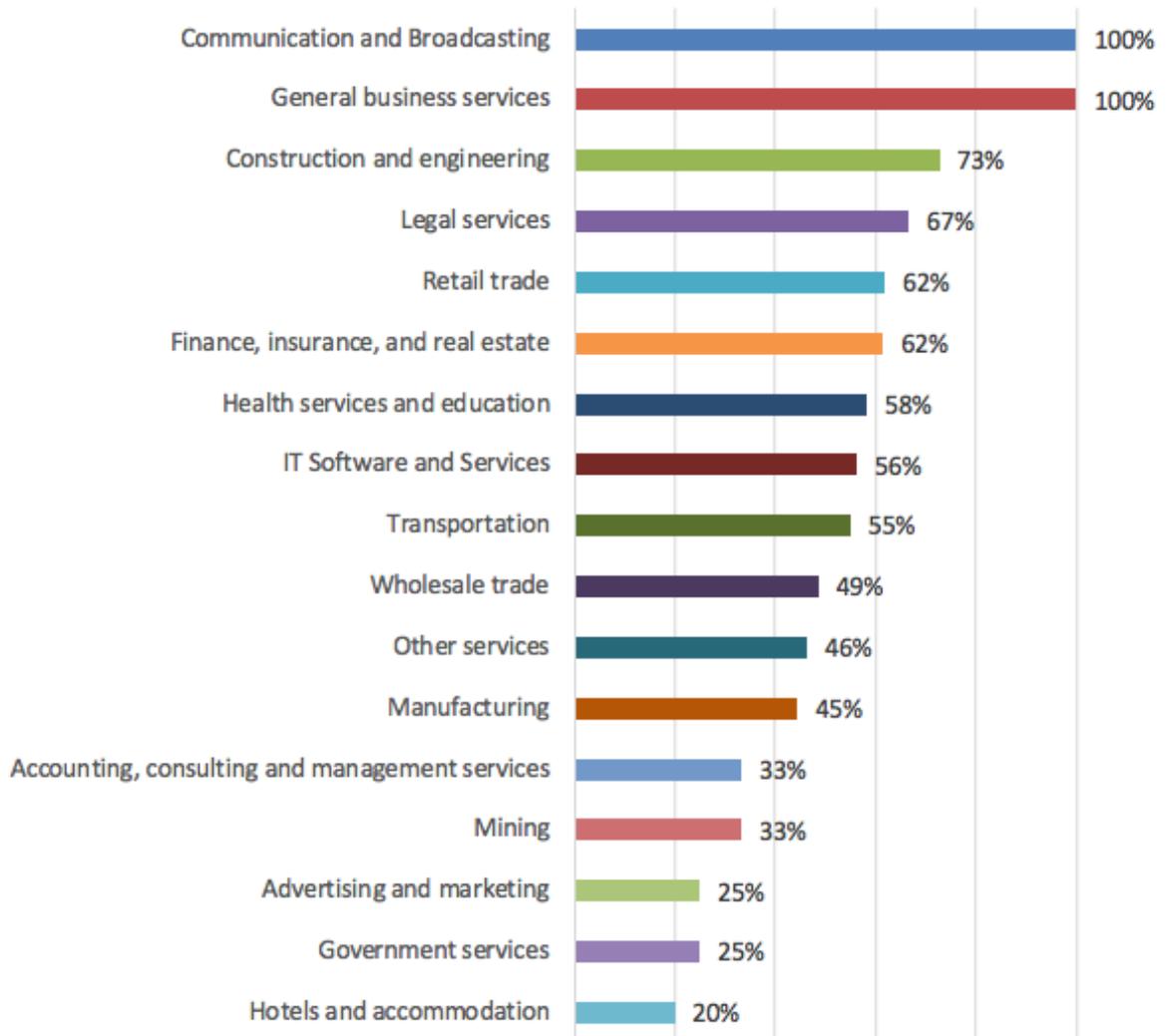


A significant proportion, 36%, of respondents say that having Mi-Fi devices is neither important nor unimportant. This could be attributed to the expensive nature of mobile data, making corporates less likely to opt for this<sup>14</sup>.

Importance	Respondents (%)
1	12%
2	9%
3	36%
4	34%
5	8%

## MiFi Devices, by Industry

### Mifi Devices (Mobile Wi-Fi)



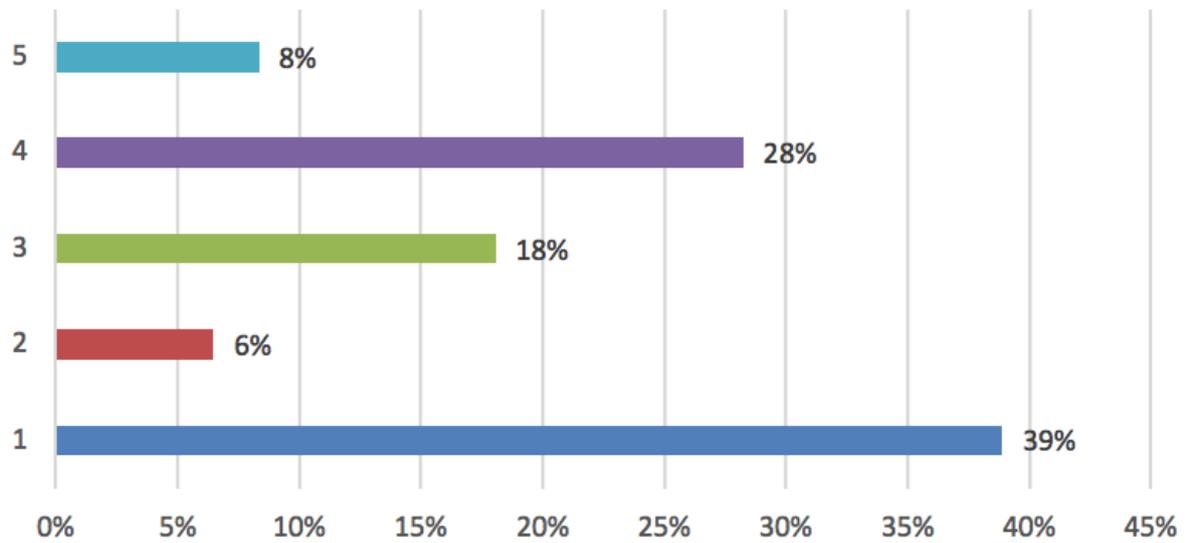
Every respondent from two industries (communication and broadcasting, and general business services) consider Mi-Fi devices to be important or very important in terms of the devices/hardware that they use.

Industry	Percentage (%)
Communication and Broadcasting	100%
General business services	100%
Construction and engineering	73%
Legal services	67%
Retail trade	62%
Finance, insurance, and real estate	62%

Health services and education	58%
IT Software and Services	56%
Transportation	55%
Wholesale trade	49%
Other services	46%
Manufacturing	45%
Accounting, consulting and management services	33%
Mining	33%
Advertising and marketing	25%
Government services	25%
Hotels and accommodation	20%
Logistics & Distribution	0%
Printing and publishing	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## Tablets

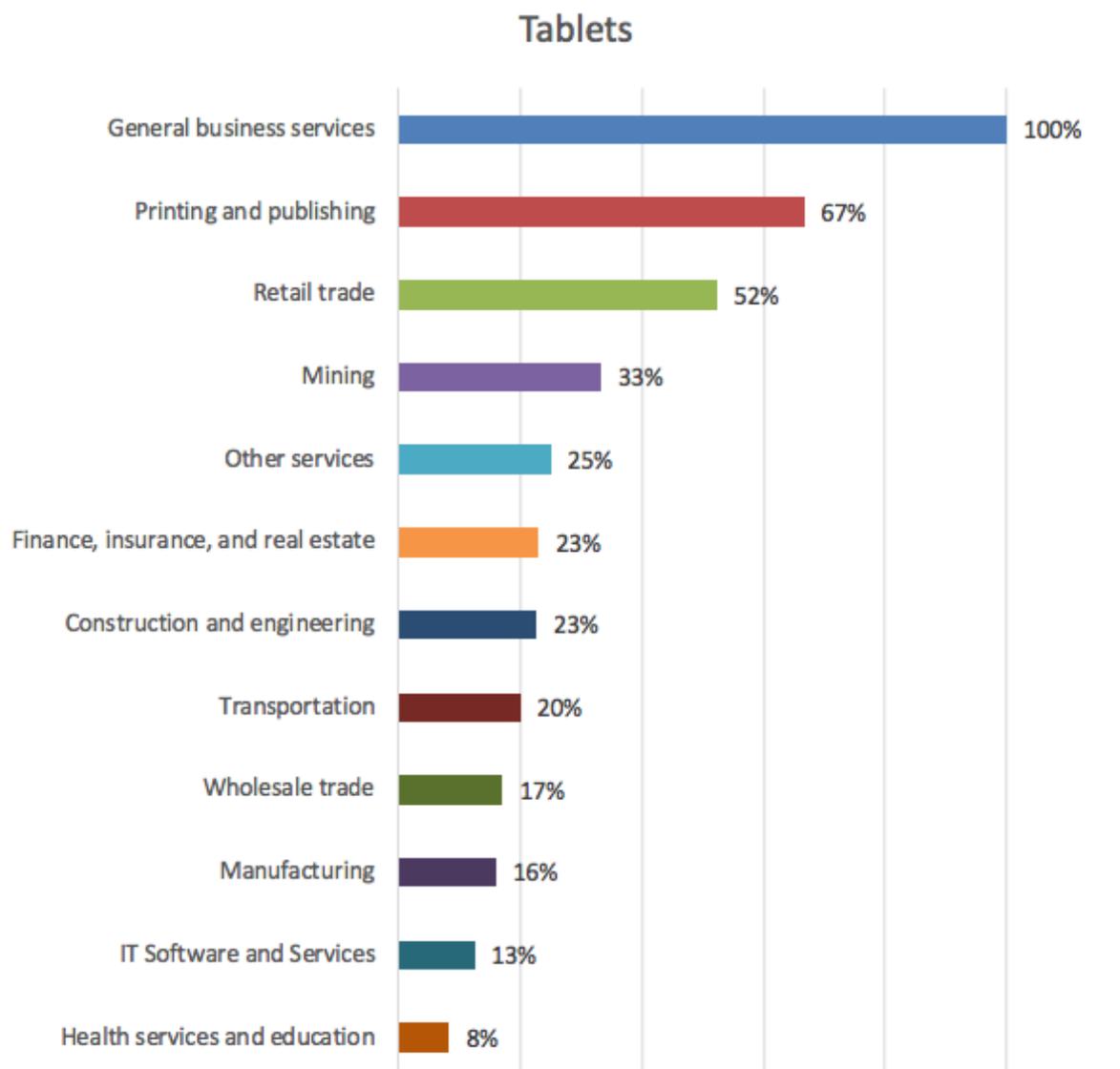
### Importance of Tablets



The highest proportion of responses, 39%, of respondents say that using tablets is very unimportant. As smartphones have replaced the need for tablets, the importance for tablets has decreased dramatically.

Importance	Respondents (%)
1	39%
2	6%
3	18%
4	28%
5	8%

## Tablets, by Industry

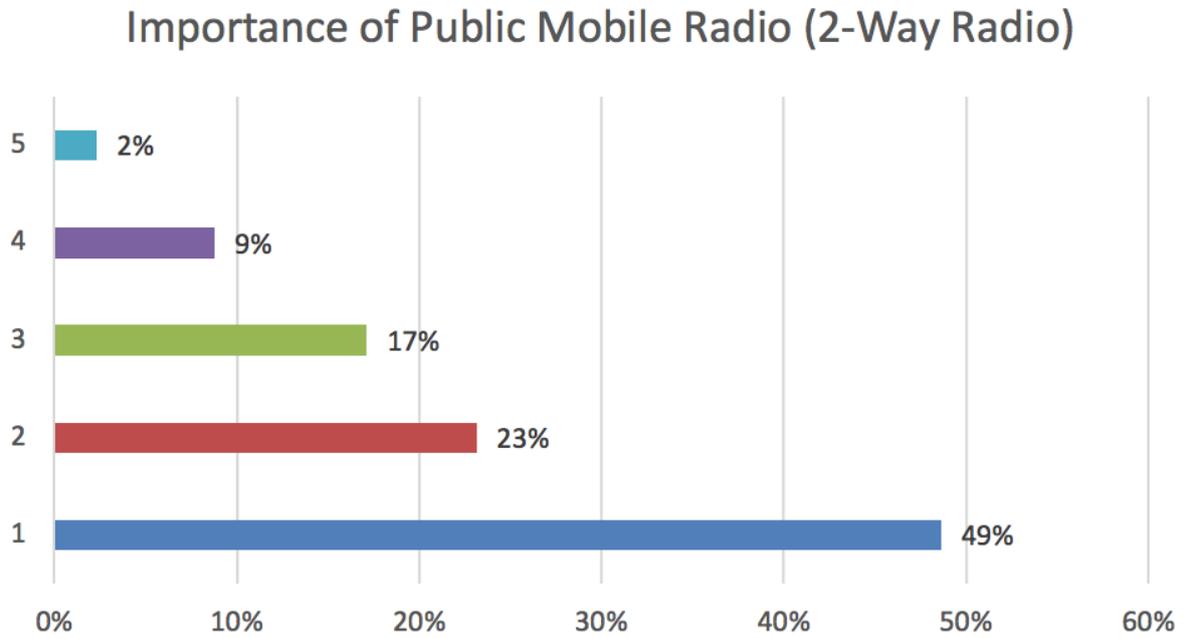


Only one industry, general business services, considers tablets to be important or very important in terms of the devices/hardware that they use. There is a steep drop off thereafter, indicating the general business services industry has a very niche use for tablets.

Industry	Percentage (%)
General business services	100%
Printing and publishing	67%
Retail trade	52%
Mining	33%
Other services	25%

Finance, insurance, and real estate	23%
Construction and engineering	23%
Transportation	20%
Wholesale trade	17%
Manufacturing	16%
IT Software and Services	13%
Health services and education	8%
Accounting, consulting and management services	0%
Advertising and marketing	0%
Communication and Broadcasting	0%
Government services	0%
Hotels and accommodation	0%
Legal services	0%
Logistics & Distribution	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## Public Mobile Radio

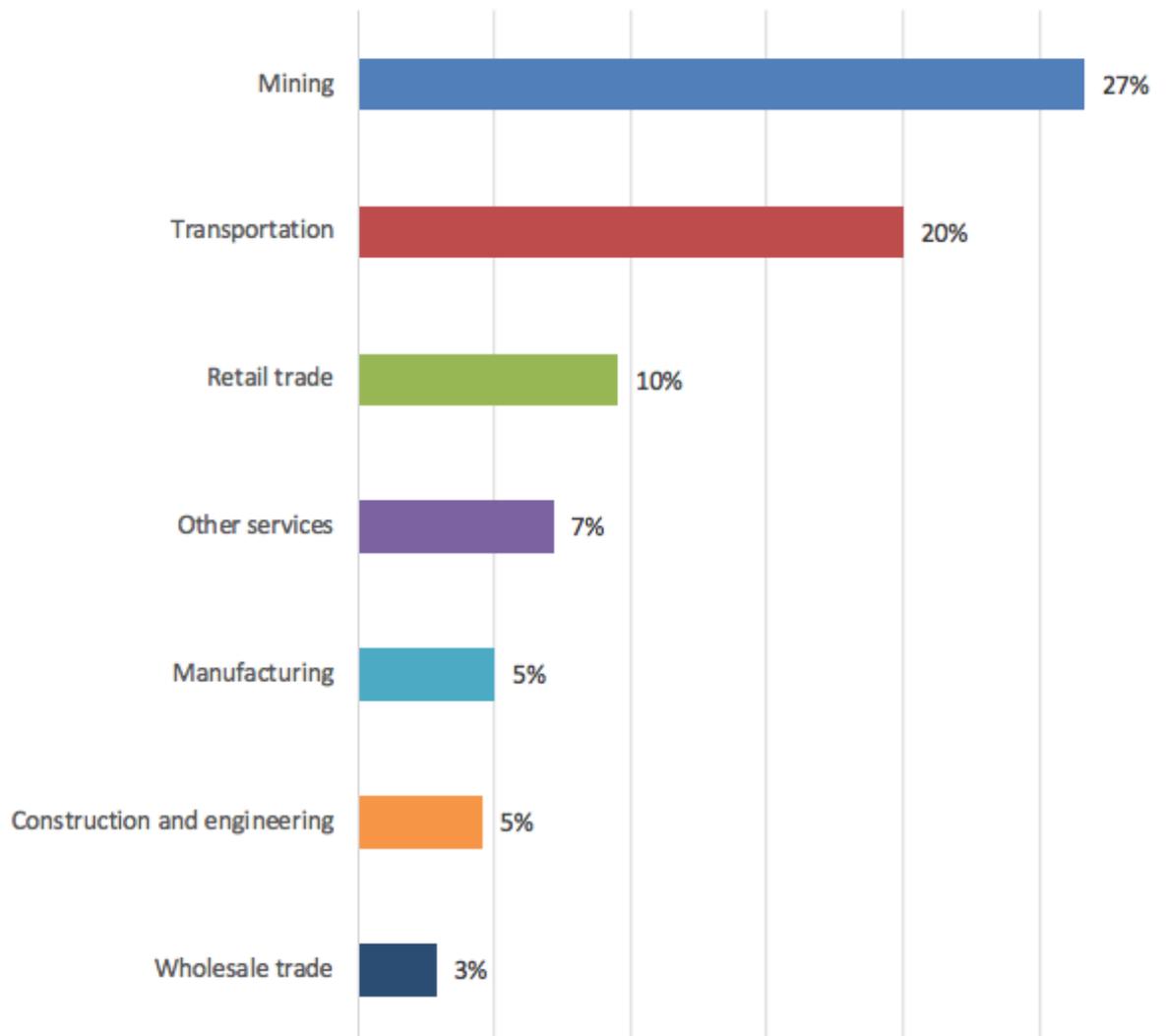


A significant proportion, 49%, of respondents say that having public mobile radio (also known as) 2-way radio is very unimportant.

Importance	Respondents (%)
1	49%
2	23%
3	17%
4	9%
5	2%

## Public Mobile Radio, by Industry

### Public Mobile Radio (2-Way Radio)



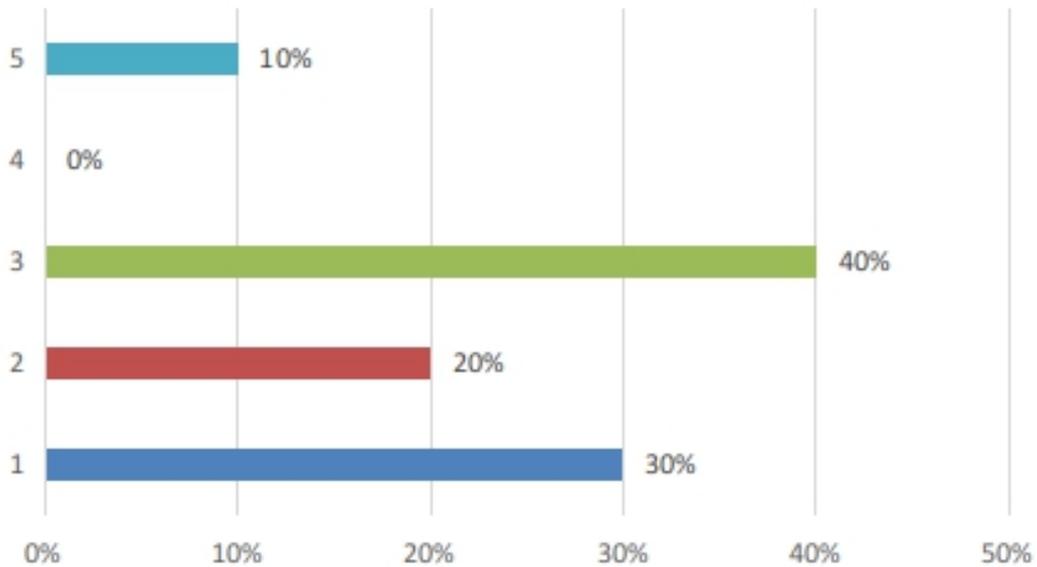
Mining is the sector with the highest response, 27%, which ranked 2-way radio as important overall, 4 or 5 importance, in terms of the devices/hardware that they use.

Industry	Percentage (%)
Mining	27%
Transportation	20%
Retail trade	10%
Other services	7%
Manufacturing	5%
Construction and engineering	5%

Wholesale trade	3%
Accounting, consulting and management services	0%
Advertising and marketing	0%
Communication and Broadcasting	0%
Finance, insurance, and real estate	0%
General business services	0%
Government services	0%
Health services and education	0%
Hotels and accommodation	0%
IT Software and Services	0%
Legal services	0%
Logistics & Distribution	0%
Printing and publishing	0%
Real Estate	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## GPS – Standalone Devices

Importance of GPS stand alone devices (eg Garmin)



Only 10% of respondents say that having public mobile radio (also known as) 2-way radio is overall important. This is most likely due to the fact that smartphones with integrated GPS systems have replaced the need for stand alone GPS devices.

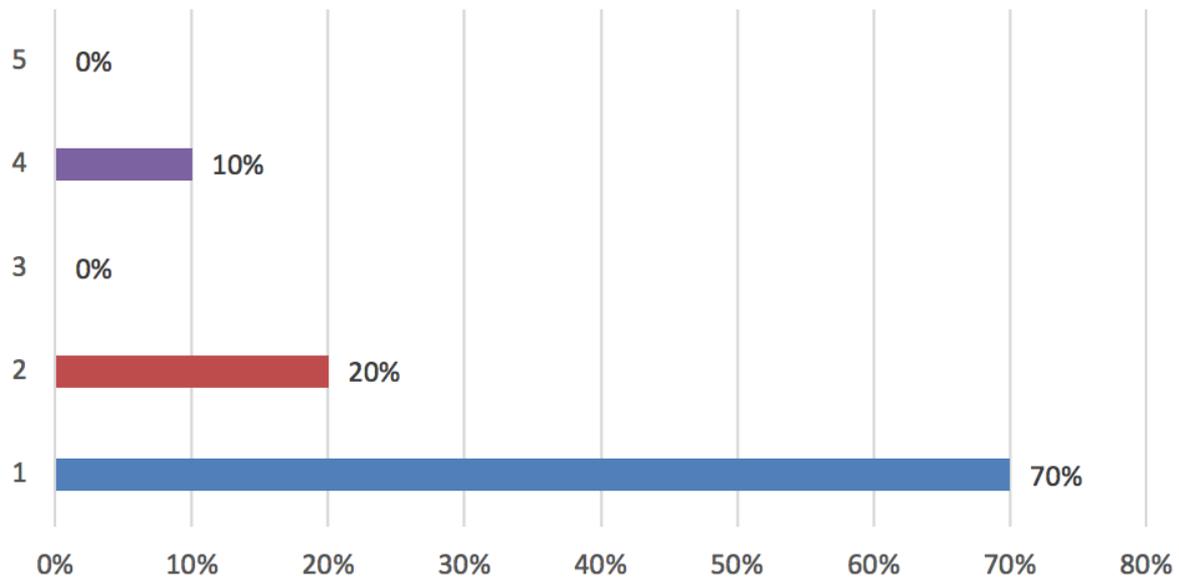
Importance	Respondents (%)
1	49%
2	23%
3	17%
4	9%
5	2%

## GPS – Standalone devices, by Industry

Not enough data to split by industry

## LTE Dongles

### Importance of LTE Dongles



A significant proportion, 70%, of respondents say that having LTE dongles is very unimportant. This is mostly likely due to smartphones featuring integrated LTE capabilities with tethering options.

Importance	Respondents (%)
1	70%
2	20%
3	0%
4	10%
5	0%

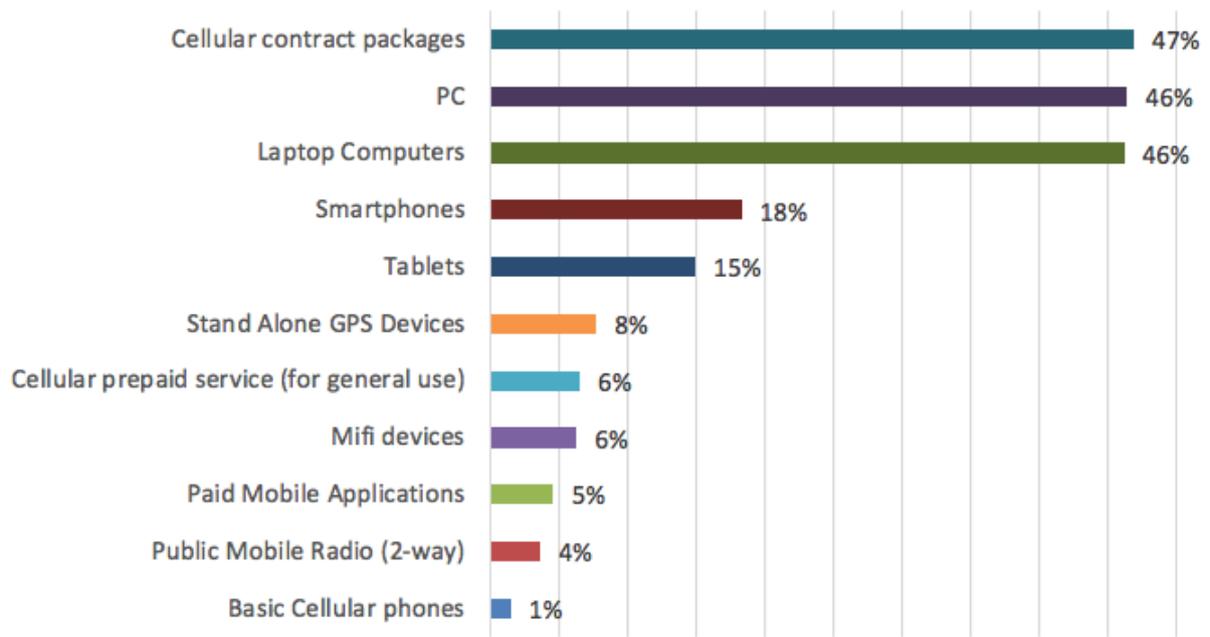
### LTE Dongles, by Industry

Not enough data to split by industry

## Technology Provided to Staff

The graph below shows the percentage of respondents who indicated that a particular technology provided to staff and paid for by the company.

Equipment and services provided by organisation



The highest proportions of respondents say that cellular contract packages, PCs, and laptop computers are provided for by their company, at 47%, 46% and 46% respectively. Computers, in general, are the most paid-for and provided devices to employees due to their vast business applications. Cell contracts and smartphones allow for communication to happen on the go, where a computer is unavailable.

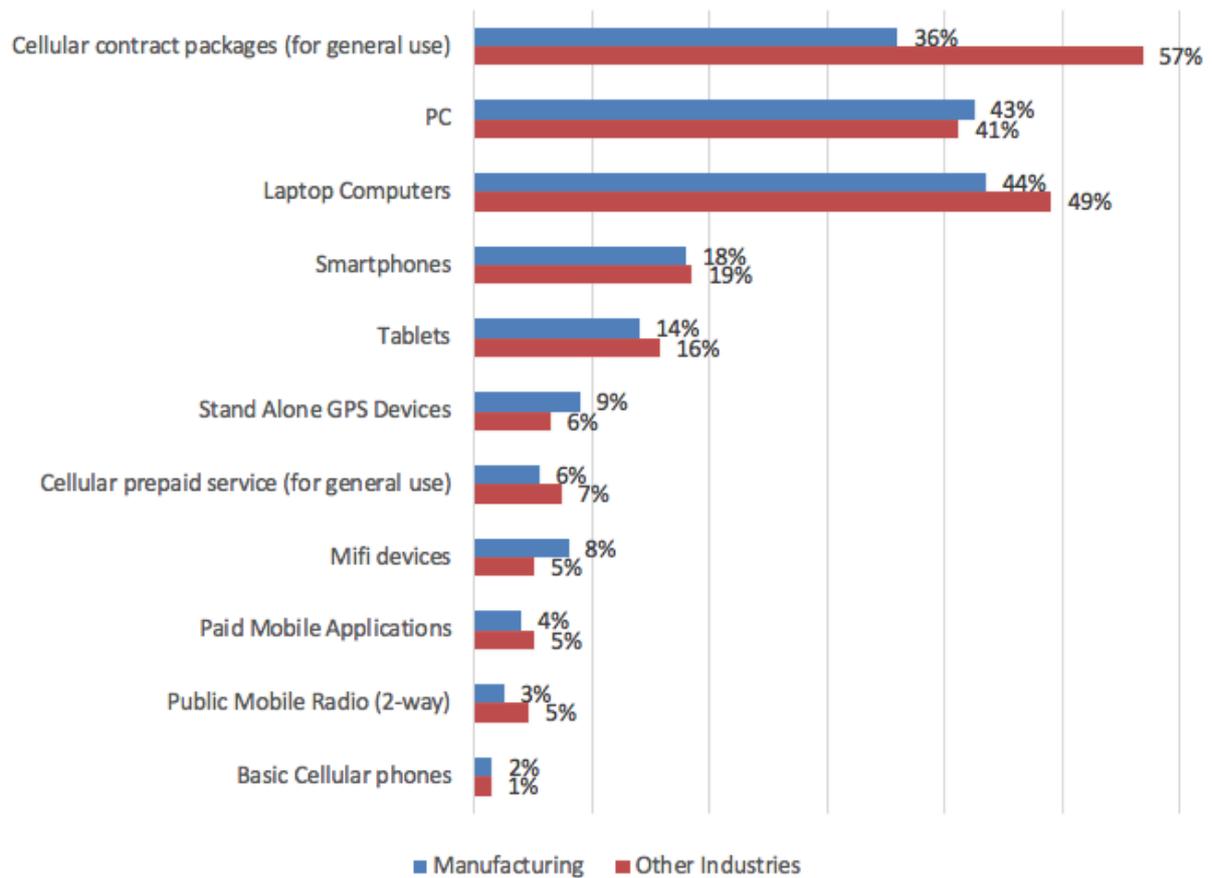
Technology	Paid For (%)
Cellular contract packages	46,88%
PC	46,39%
Laptop Computers	46,15%
Smartphones	18,27%
Tablets	14,90%
Stand Alone GPS Devices	7,69%
Cellular prepaid service (for general use)	6,49%
Mifi devices	6,25%

Paid Mobile Applications	4,57%
Public Mobile Radio (2-way)	3,61%
Basic Cellular phones	1,44%

## Technology Provided to Staff, by Industry

The graph below shows the percentage of respondents who indicated that a particular technology provided to staff and paid for by the company.

Equipment and services provided by the organisation



The technology/service with the largest parity is cellular contracts, where the manufacturing sector is 21% below other industries. This could indicate that those who operate in the manufacturing are less inclined to need mobile connectivity out of their workplaces.

Equipment and services provided by the organisation	Manufacturing	Other Industries
Cellular contract packages (for general use)	36%	57%
PC	43%	41%
Laptop Computers	44%	49%
Smartphones	18%	19%
Tablets	14%	16%

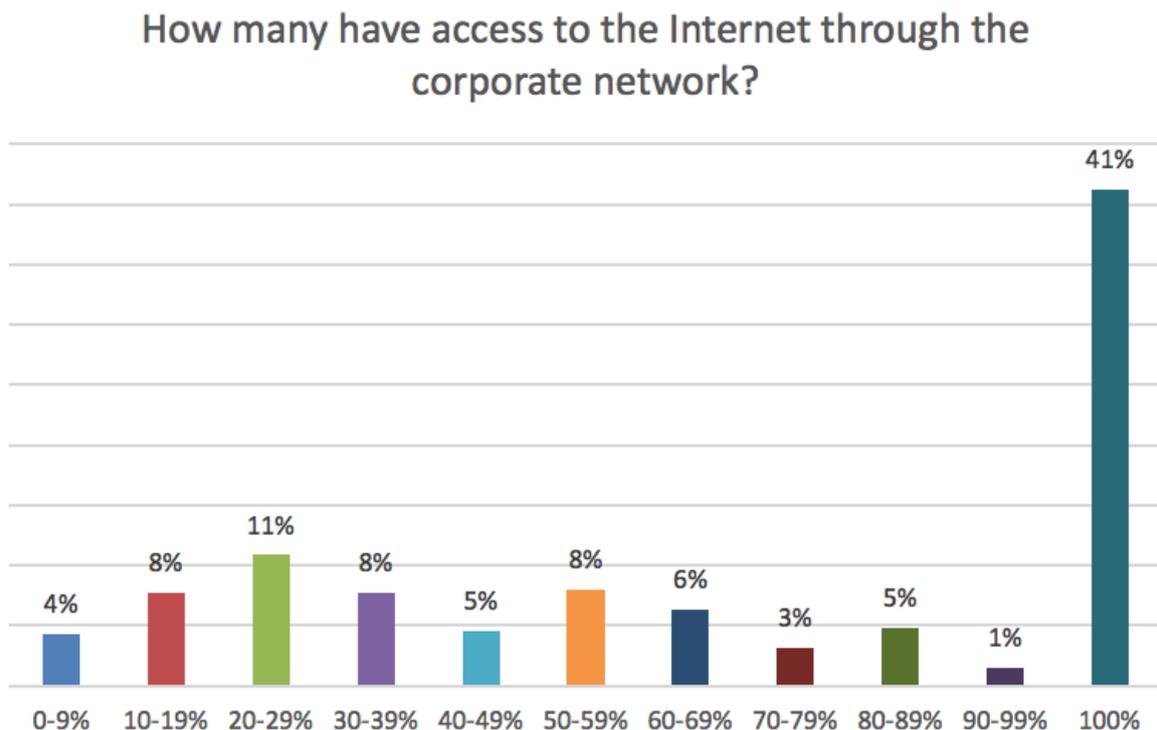
Stand Alone GPS Devices	9%	6%
Cellular prepaid service (for general use)	6%	7%
Mifi devices	8%	5%
Paid Mobile Applications	4%	5%
Public Mobile Radio (2-way)	3%	5%
Basic Cellular phones	2%	1%

## Part 2: Employees and Technology

In this section, we look specifically at the interaction between employees and mobile enterprise technology. This section also goes deeper into employee connectivity and level of skills at using current advanced technology.

### Employees Connected to the Internet

This graph represents a proportion of employees connected to the Internet in percentage connected intervals.



Under half, 41%, of respondents reported that every employee is connected to the corporate network. This, in conjunction with the large number of smaller businesses in the sample, may indicate a less strict Internet access policy in these smaller corporates <sup>7</sup>.

Percentage interval connected	Percentage Connected (%)
0-9%	4,34%
10-19%	7,71%
20-29%	10,84%
30-39%	7,71%

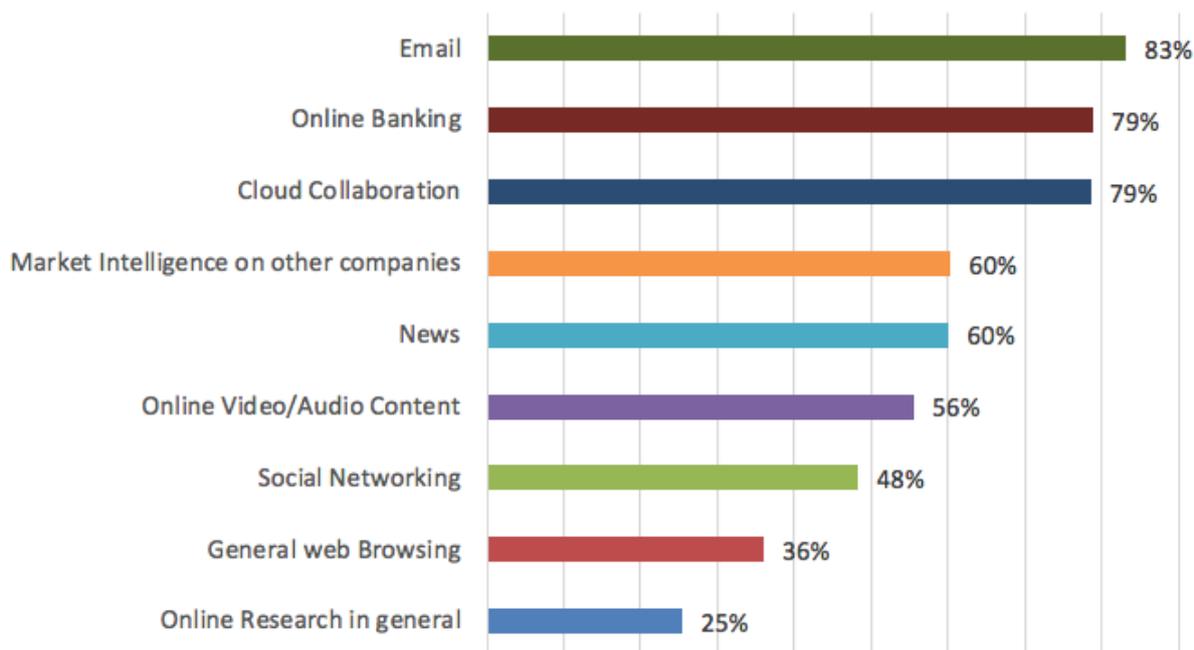
<sup>7</sup> Parsons, D., 2017. Stakeholder, corporate, and policy perspectives. *Capacity Building in a Changing ICT Environment*.

40-49%	4,58%
50-59%	7,95%
60-69%	6,27%
70-79%	3,13%
80-89%	4,82%
90-99%	1,45%
100%	41,20%

## Uses of Internet by Employees

Respondents were asked about which applications of the Internet their employees made use of.

### Why employees use the Internet at work



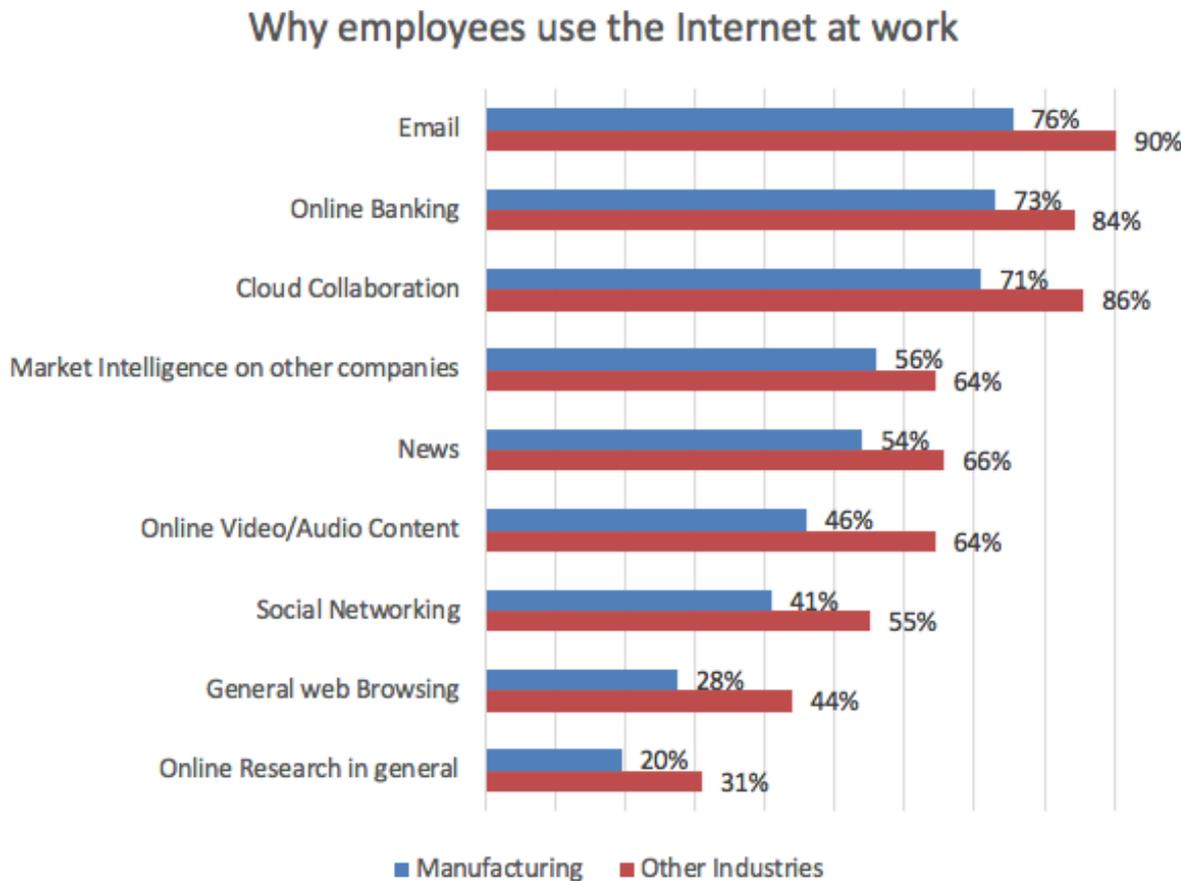
The largest proportion of respondents, 83%, say that email is the most common use of their Internet access. This is followed by online banking and cloud collaboration, both at 79%.

Use	Percentage Respondents (%)
Email	83%
Online Banking	79%
Cloud Collaboration	79%
Market Intelligence on other companies	60%
News	60%
Online Video/Audio Content	56%
Social Networking	48%
General web Browsing	36%

Online Research in general	25%
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## Uses of Internet by Employees, Split by Manufacturing

This was split by manufacturing and other industries.



In every technology, the manufacturing sector makes less use of the technologies, indicating a lesser penetration. That said, the trend the manufacturing sector follows the other industries sector, which indicates the ranking of the technologies remains similar across all industries.

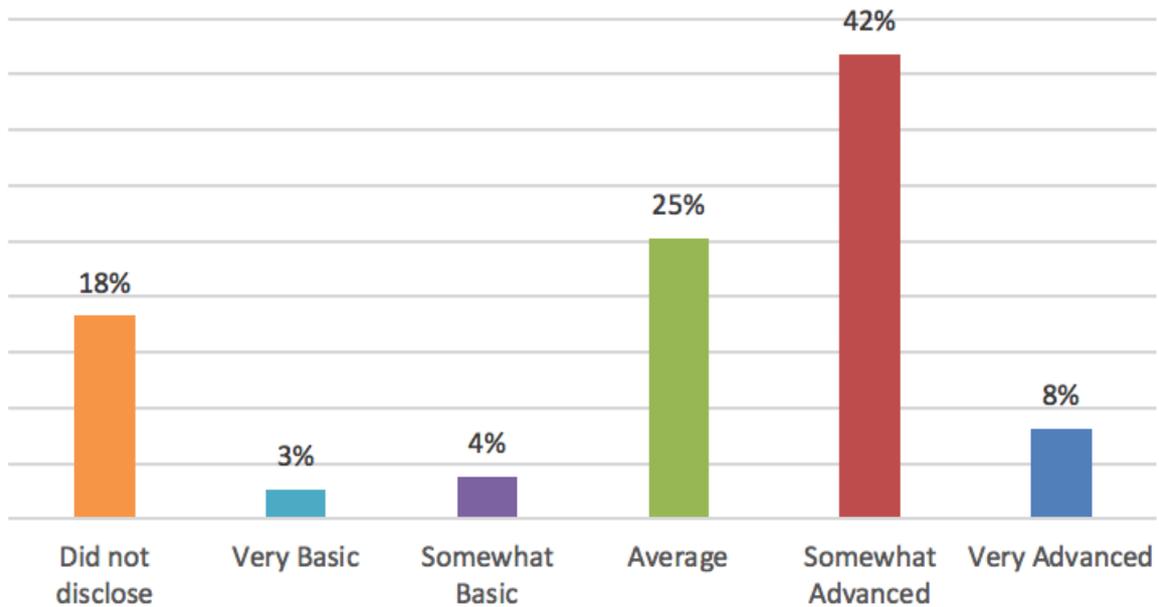
Why employees use the Internet at work	Manufacturing	Other Industries
Email	76%	90%
Online Banking	73%	84%
Cloud Collaboration	71%	86%
Market Intelligence on other companies	56%	64%
News	54%	66%
Online Video/Audio Content	46%	64%

Social Networking	41%	55%
General web Browsing	28%	44%
Online Research in general	20%	31%

## Mobile Skill Levels

Businesses were asked about the skill level their employees possess with regard to their use of mobile devices and applications. The respondents were asked on a scale from “Very advanced” to “Don’t use”.

Existing use of basic mobile technologies

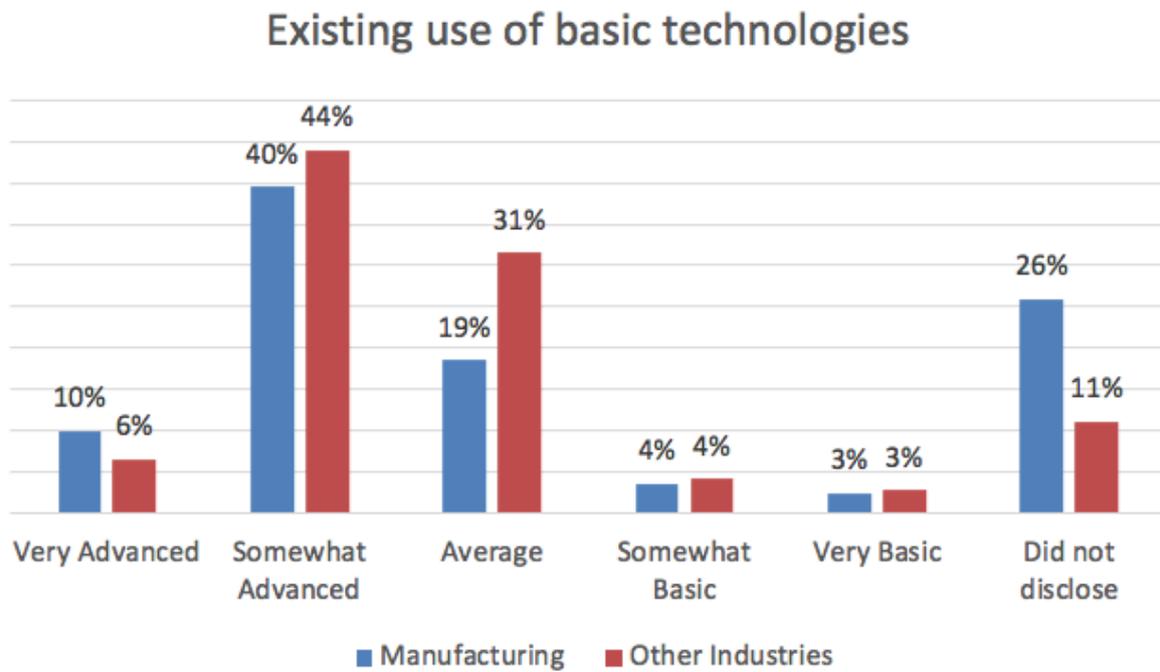


42% of respondents report that their employees’ existing use of basic mobile devices/applications is somewhat advanced, followed by average at 25%. Overall, around 70% of the respondents make use of the mobile devices and apps at a higher than basic level.

Usage	Respondents (%)
Very Advanced	8%
Somewhat Advanced	42%
Average	25%
Somewhat Basic	4%
Very Basic	3%
Did not disclose	18%

## Mobile Skill Levels, split by manufacturing and other industries

The previous findings were then split by manufacturing and other industries.



Manufacturing is slight more advanced when looking at the very advanced section, at 4% higher. This change when observing the somewhat advanced section, at 4% lower. This shows that the manufacturing sector is more advanced than other industries, while keeping in line with the general advanced level of all industries.

Existing use of basic technologies	Manufacturing	Other Industries
Very Advanced	10%	6%
Somewhat Advanced	40%	44%
Average	19%	31%
Somewhat Basic	4%	4%
Very Basic	3%	3%
Did not disclose	26%	11%

## Advanced Mobile Use, by Industry

The following graphs show the percentage of respondents from each industry that indicated that employee's usage of basic mobile applications and features was advanced, or very advanced.

Advanced mobile use of basic mobile technologies



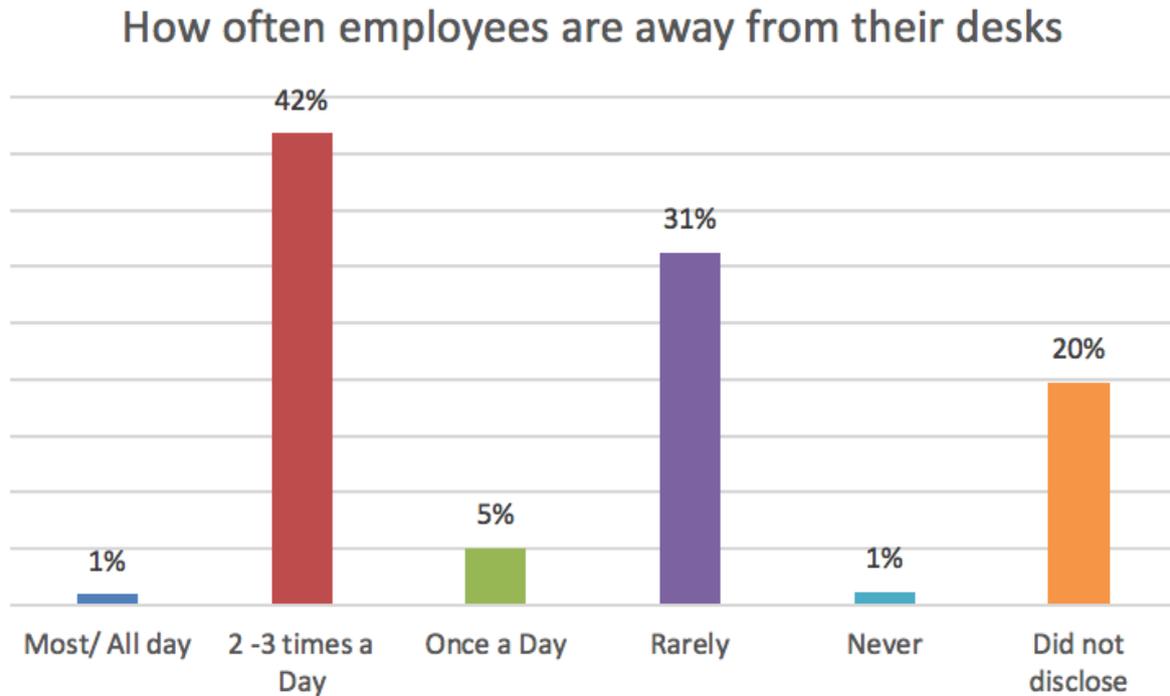
The industry with the most responses, 100%, from general business services say that they make overall advanced, very advanced or advanced, use of basic mobile devices and apps. This trend drops off thereafter with five industries indicating

Industry	Percentage (%)
General business services	100%
Construction and engineering	77%
Printing and publishing	67%
IT Software and Services	63%

Health services and education	50%
Wholesale trade	43%
Hotels and accommodation	40%
Finance, insurance, and real estate	38%
Transportation	35%
Accounting, consulting and management services	33%
Manufacturing	33%
Retail trade	29%
Advertising and marketing	25%
Mining	20%
Other services	14%
Communication and Broadcasting	0%
Government services	0%
Legal services	0%
Logistics & Distribution	0%
Real Estate	0%
Response	0%
Retail	0%
Telecommunications	0%
Travel & Tourism	0%
Utilities & Energy Services	0%

## How often employees are away from their desks

Respondents were asked about how often they were away from their desks, on a scale from “Most/All day” to “Never”.

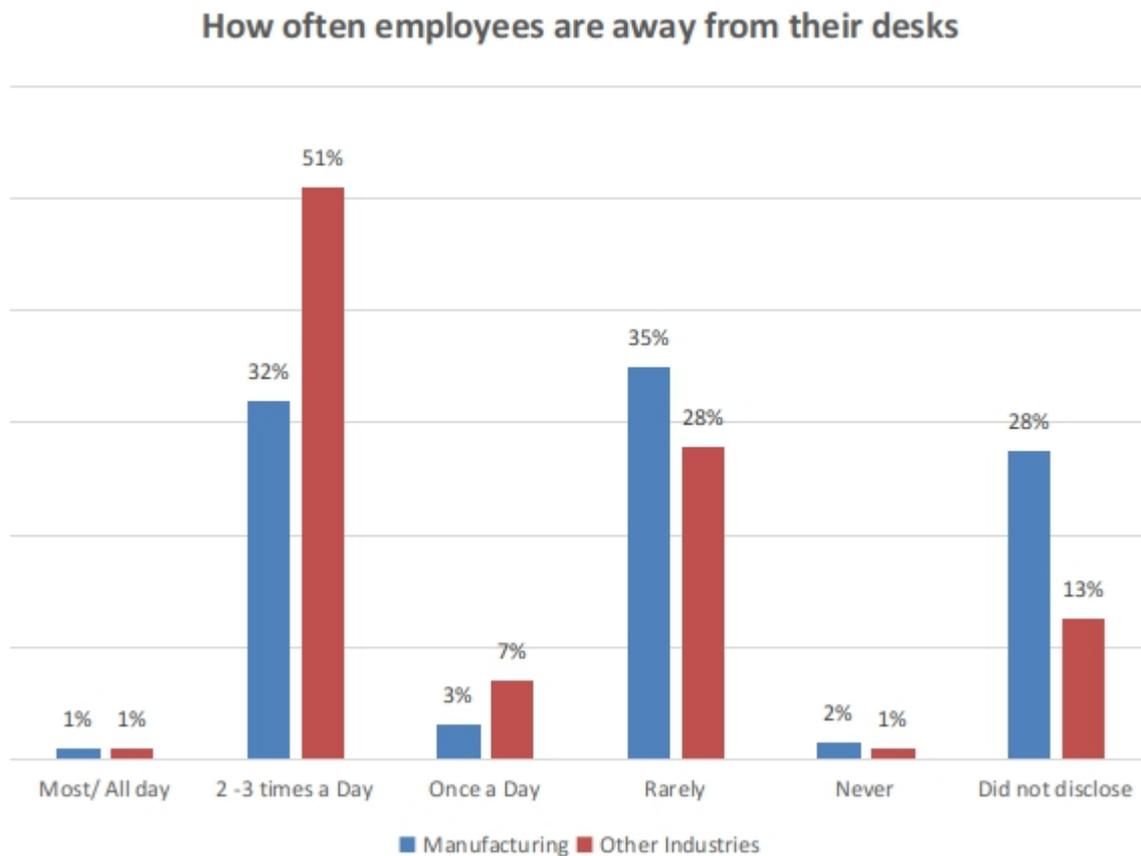


The largest proportion of respondents, 42%, say that they are away from their desks 2 – 3 times a day, followed by those who say that they are rarely away from their desks, at 31%.

Frequency of Use	Respondents (%)
Most/ All day	0,96%
2 -3 times a Day	41,83%
Once a Day	5,05%
Rarely	31,25%
Never	1,20%
Did not disclose	19,71%

## How often employees are away from their desks, split by manufacturing and other industries

Respondents were asked about how often they were away from their desks, on a scale from “Most/All day” to “Never”.



The largest proportion of respondents, 42%, say that they are away from their desks 2 – 3 times a day, followed by those who say that they are rarely away from their desks, at 31%.

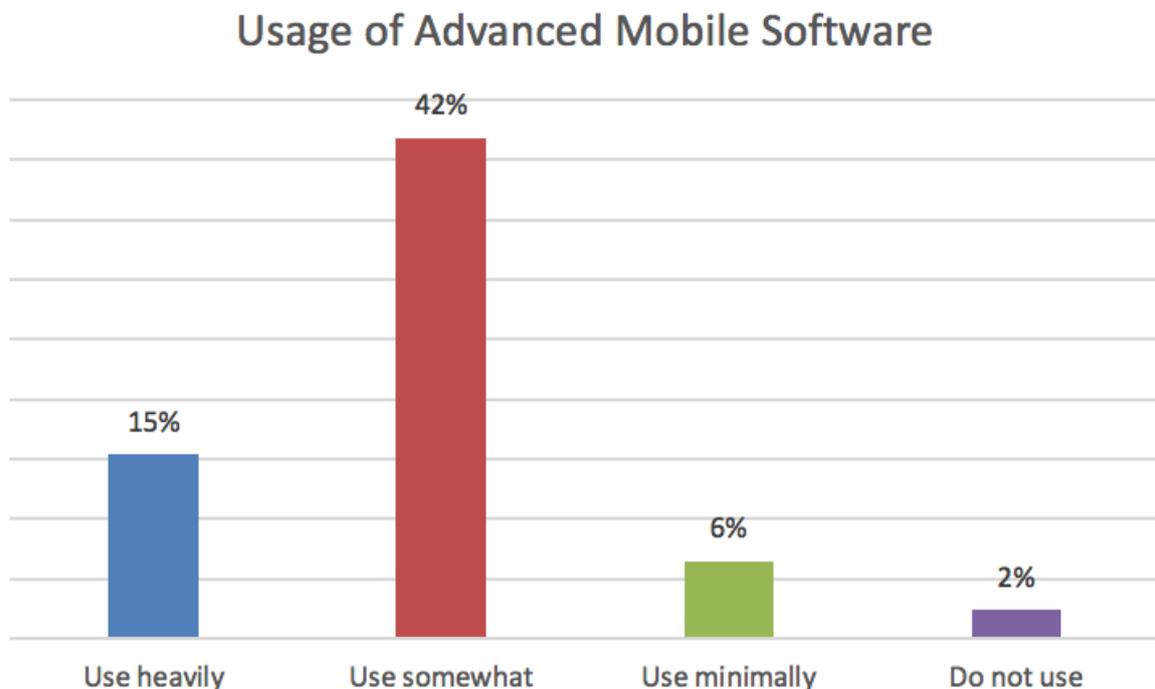
Employees away from desks	Manufacturing	Other Industries
Most/ All day	1%	1%
2 -3 times a Day	32%	51%
Once a Day	3%	7%
Rarely	35%	28%
Never	2%	1%
Did not disclose	28%	13%

## Use of Advanced Mobile Software

Respondents were asked about their company’s use of advanced mobile software in relation to the above software categories. For example, applications include mobile ERP and mobile accounting.

## Level of Advanced Mobile Software Usage

Businesses were asked about the level to which they make use of advanced mobile software, on a scale from “Use heavily” to “Do not use”.

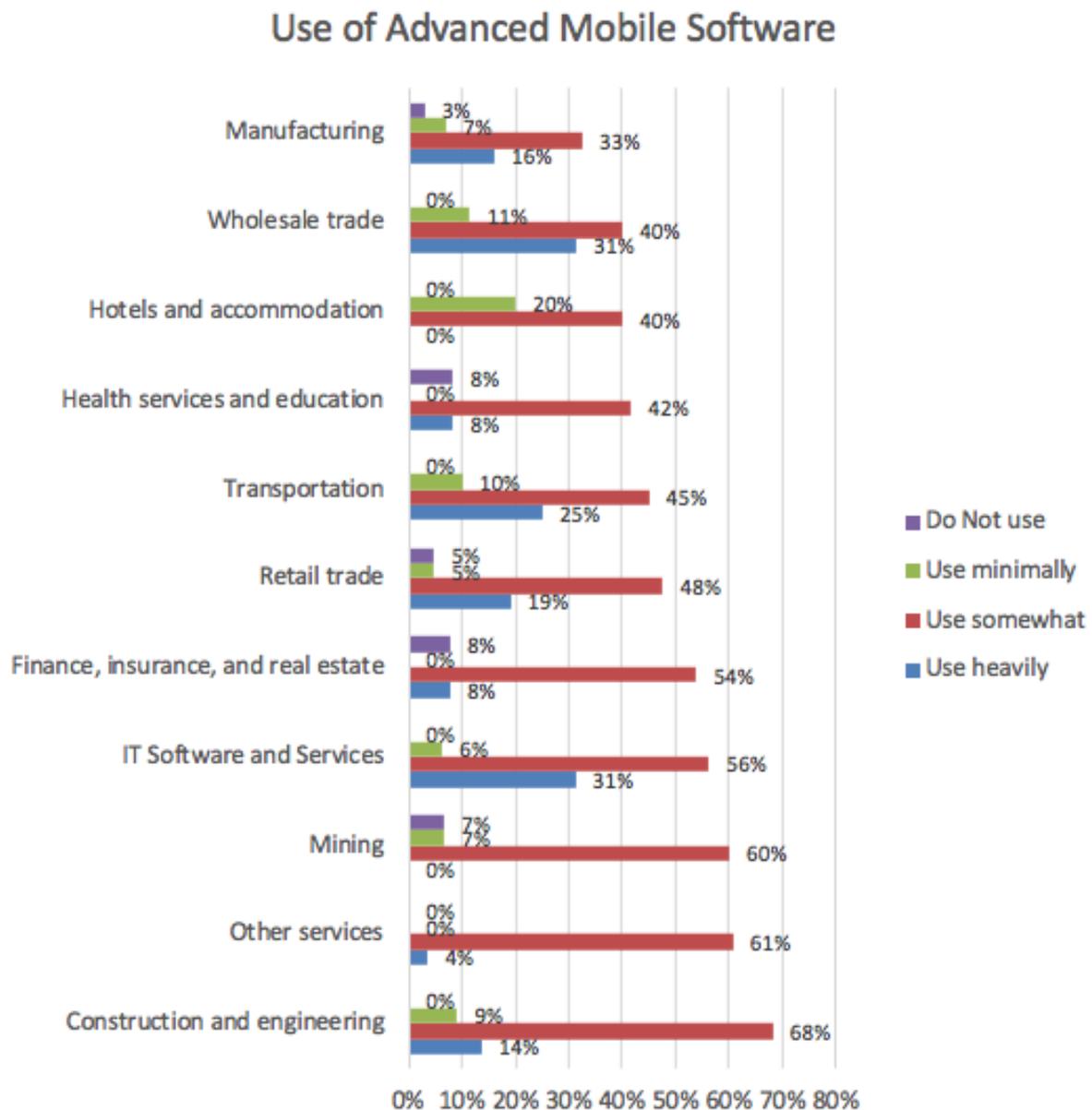


The proportion with the highest response, 42%, say that they somewhat use advanced mobile software, followed by those who use advanced mobile software heavily, at 15%. This may suggest a digital divide between companies who are very connected and skill equipped and companies which are not.

Usage	Percentage (%)
Use heavily	15%
Use somewhat	42%
Use minimally	6%
Do not use	2%

## Advanced Mobile Software, by Industry

The responses are analysed across industries with significant responses.

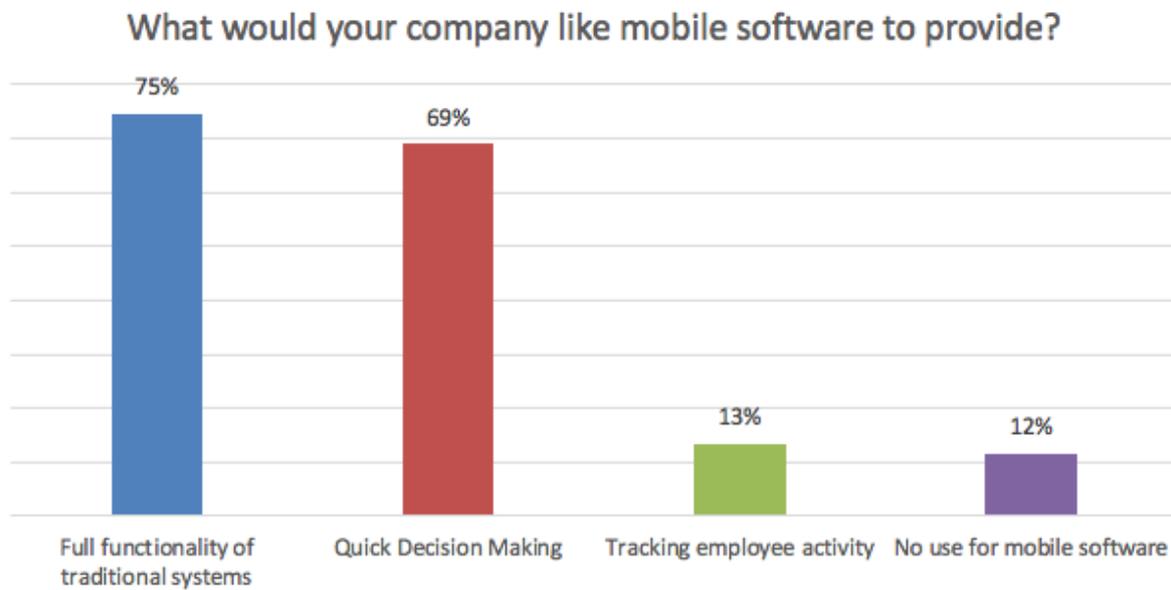


The industry with the highest proportion, 68%, of responses to heavy use of advanced mobile software is construction and engineering.

**Add table**

## What companies want from their mobile software

Respondents were asked about their level of usage with regard to the overall software functionality that they mobile software provides.



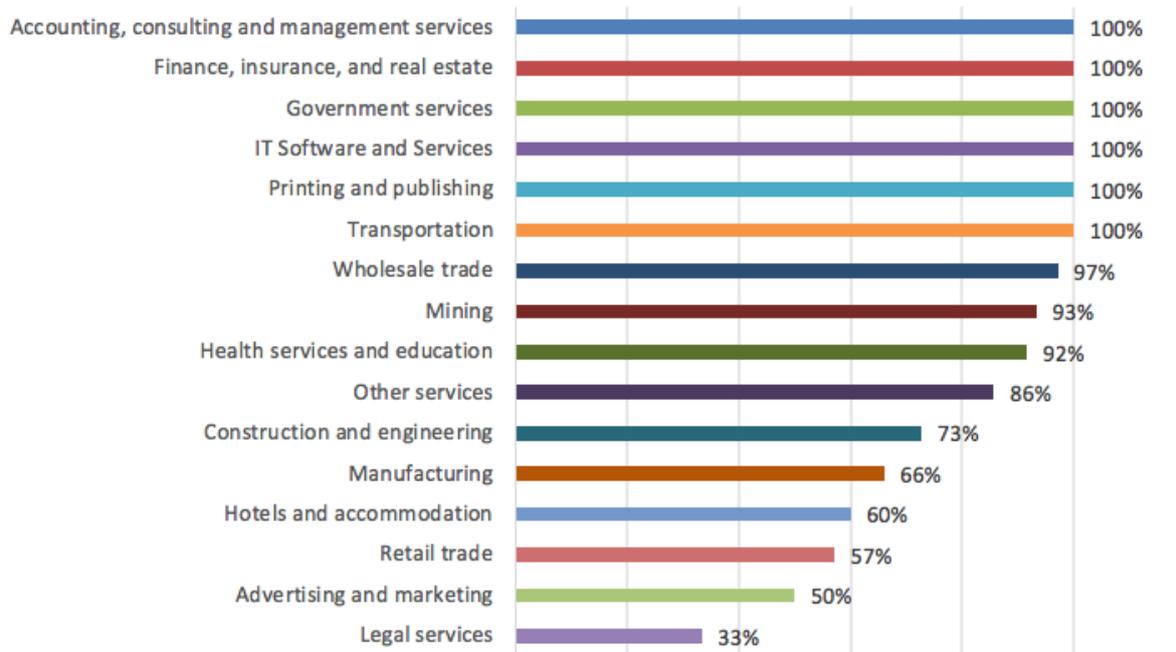
Of those who make use of advanced mobile software, the proportion with the highest response, 75%, say that they make use of full functionality of traditional system. This suggests that businesses are well equipped in using their business software to the full extent of its functionality.

Scope of Functionality	Percentage (%)
Full functionality of traditional systems	75%
Quick Decision Making	69%
Tracking employee activity	13%
No use for mobile software	12%

## Advanced Mobile Software Needs, by Industry

### Full functionality of traditional systems

Full functionality of traditional systems



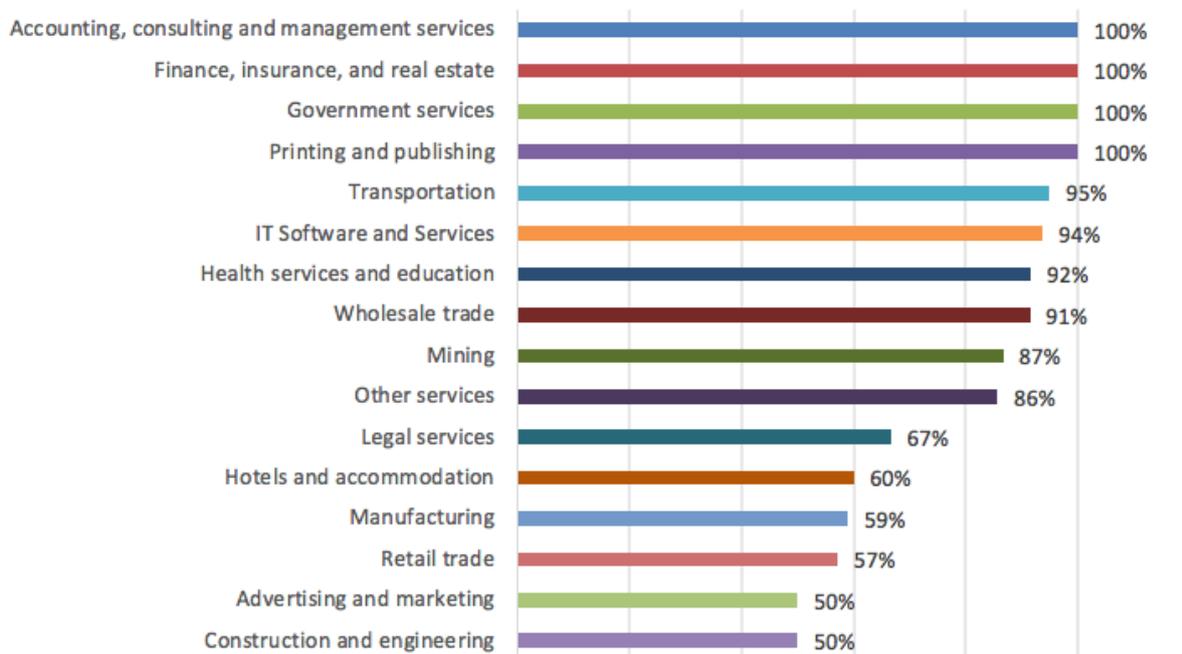
There are five industries with a 100% response rate who say that they need advanced mobile software with a decision making feature.

Industry	Percentage (%)
Accounting, consulting and management services	100%
Finance, insurance, and real estate	100%
Government services	100%
IT Software and Services	100%
Printing and publishing	100%
Transportation	100%
Wholesale trade	97%
Mining	93%
Health services and education	92%
Other services	86%

Construction and engineering	73%
Manufacturing	66%
Hotels and accommodation	60%
Retail trade	57%
Advertising and marketing	50%
Legal services	33%
Retail	0%

## Quick Decision Making

Quick decision making

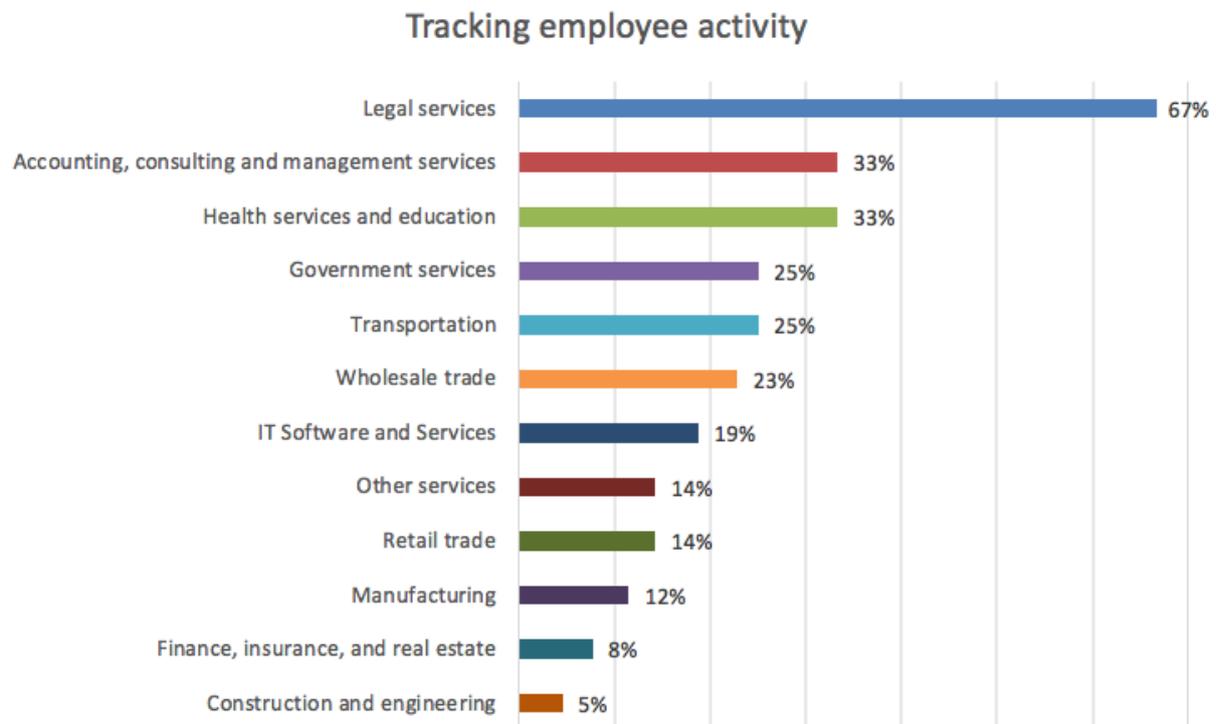


There are four industries with a 100% response rate who say that they need advanced mobile software for the ability to make quick decisions.

Industry	Percentage (%)
Accounting, consulting and management services	100%
Finance, insurance, and real estate	100%
Government services	100%
Printing and publishing	100%
Transportation	95%
IT Software and Services	94%
Health services and education	92%
Wholesale trade	91%
Mining	87%
Other services	86%
Legal services	67%

Hotels and accommodation	60%
Manufacturing	59%
Retail trade	57%
Advertising and marketing	50%
Construction and engineering	50%
Retail	0%
Finance, insurance, and real estate	100%

## Tracking Employee Activity

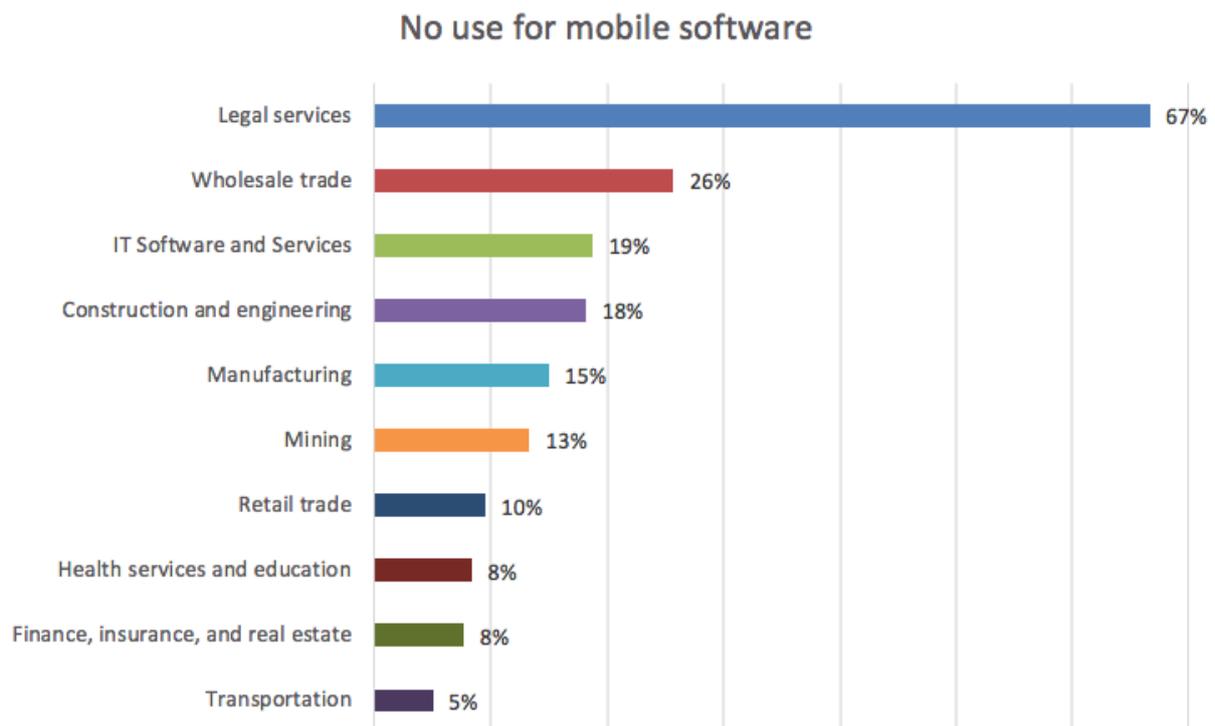


The industry with the highest proportion of responses, 67%, who say that they need advanced mobile software with an employee tracking feature is legal services.

Industry	Percentage (%)
Legal services	67%
Accounting, consulting and management services	33%
Health services and education	33%
Government services	25%
Transportation	25%
Wholesale trade	23%
IT Software and Services	19%
Other services	14%
Retail trade	14%
Manufacturing	12%
Finance, insurance, and real estate	8%

Construction and engineering	5%
Advertising and marketing	0%
Hotels and accommodation	0%
Mining	0%
Printing and publishing	0%
Retail	0%

## No use for Advanced Mobile Software, by Industry



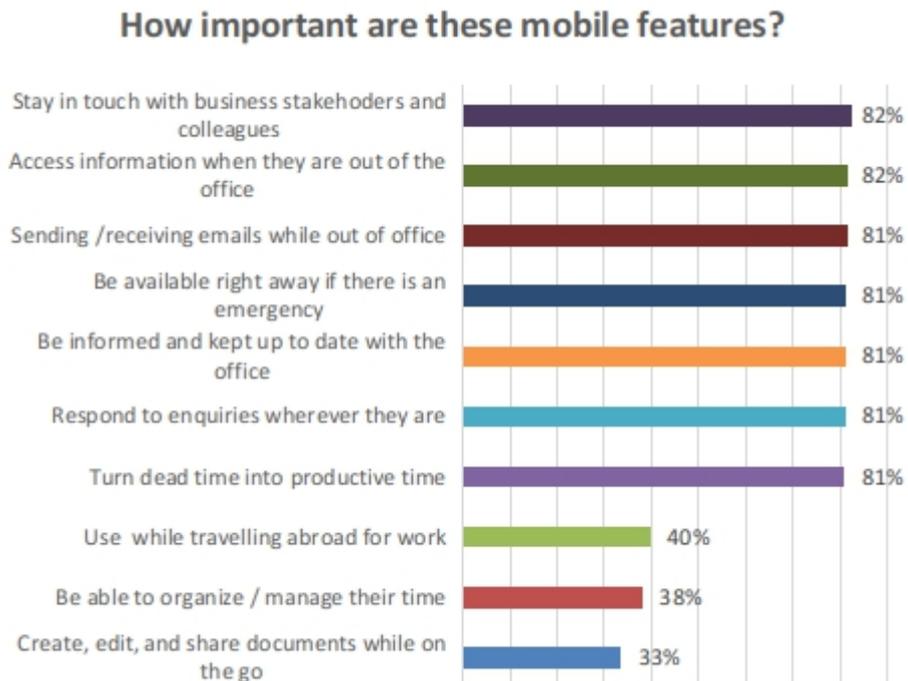
The industry with the highest proportion response, 67%, who say that they do not have a need for advanced mobile features is legal services.

Industry	Percentage (%)
Legal services	67%
Wholesale trade	26%
IT Software and Services	19%
Construction and engineering	18%
Manufacturing	15%
Mining	13%
Retail trade	10%
Health services and education	8%
Finance, insurance, and real estate	8%
Transportation	5%
Accounting, consulting and management services	0%

Advertising and marketing	0%
Government services	0%
Hotels and accommodation	0%
Other services	0%
Printing and publishing	0%
Retail	0%

## Purpose of Employee Mobile Access

On a scale from 1 to 5, where 1 is “Very Unimportant” and 5 is “Very Important”, the respondents were asked about the importance of various purposes of mobile access. The graph below shows the percentage of respondents who indicated that a particular requirement was a 4 or 5, important overall, for employee mobile access



The seven most prominent requirements for mobile access are staying in touch with business stakeholders and colleagues, having access to information when they are out of office, sending/receiving emails when out of office, being informed about the office when office, being available in emergencies, responding to enquiries from anywhere and turning dead time into productive time, at just over 80%

Requirement	Respondents (%)
Stay in touch with business stakeholders and colleagues	82%
Access information when they are out of the office	82%
Sending /receiving emails while out of office	81%
Respond to enquiries wherever they are	81%
Be informed and kept up to date with the office	81%
Be available right away if there is an emergency	81%
Turn dead time into productive time	81%
Use while travelling abroad for work	40%

Be able to organize / manage their time	38%
Create, edit, and share documents while on the go	33%

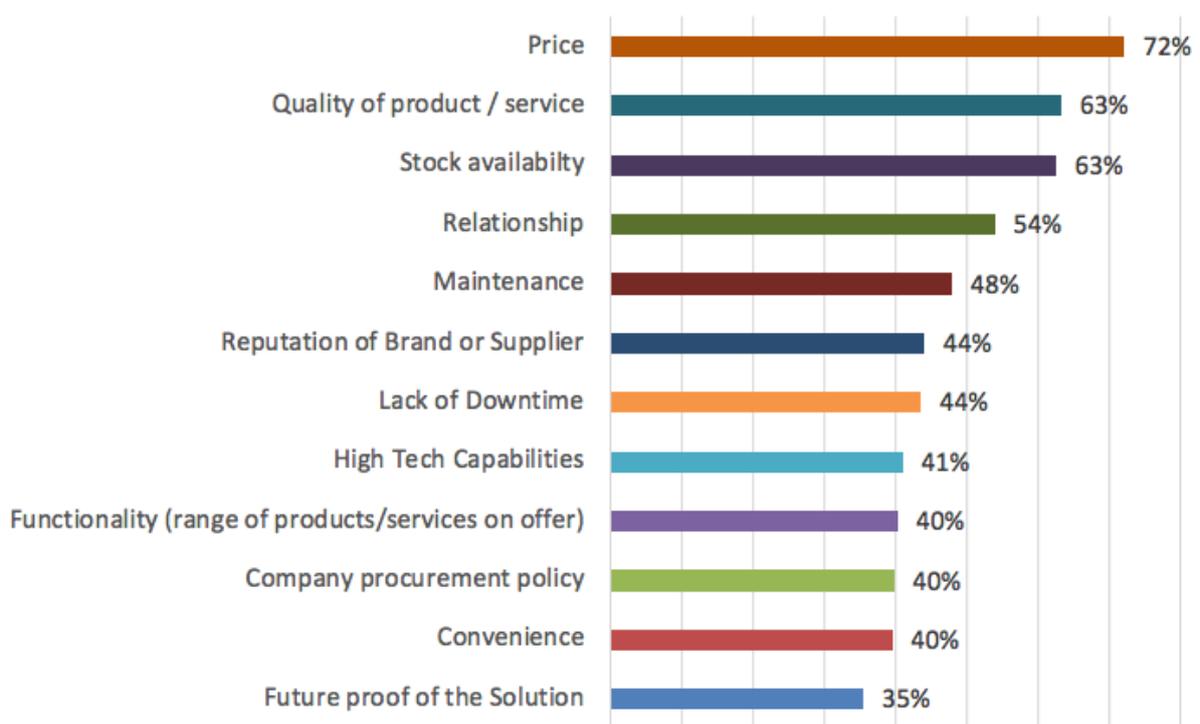
## Part 3: Budgeting and Vendor Selection

A critical element of the use of mobile and other technology is the selection of vendors. While historical research from World Wide Worx showed the quality of the product was the key factor, pricing has become increasingly important to these businesses. We apply this question specifically to mobile technologies.

### Criteria for Selecting Provider

Respondents were asked how important the criteria are, 1 is unimportant and 5 is very important. The ratings for 5 (very important) were very practical in rating the factors. In context of a typical business, a business will evaluate one or two criterion as important, with most others being rated far less important. The graph below shows the percentage of respondents who indicated that a particular criteria was very important when selecting a technology provider.

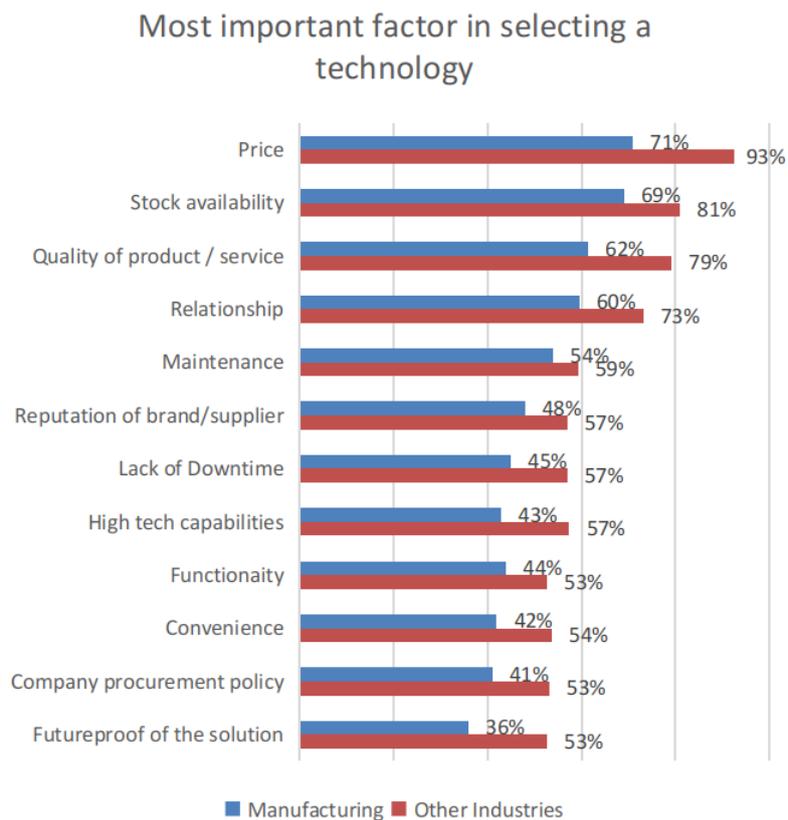
Most important factor in selecting a technology



Price (72%), quality of product or service (63%) and stock availability (63%) are ranked very important by the most respondents. *Price* ranked the most important among respondents, at 72% and almost 10% above the second place of *Quality of product or service*, at 63%. Last year, Quality of product or service ranked first in this question, while Price ranked fifth. This may be indicative of an economic shift towards more affordable software packages.

Criteria	Very Important (%)
Price	72%
Quality of product or service	63%
Stock availability	63%
Relationship	54%
Maintenance	48%
Reputation of Brand or Supplier	44%
Lack of Downtime	44%
High Tech Capabilities	41%
Functionality (range of products/services on offer)	40%
Company procurement policy	40%
Convenience	40%
Future proof of the Solution	35%

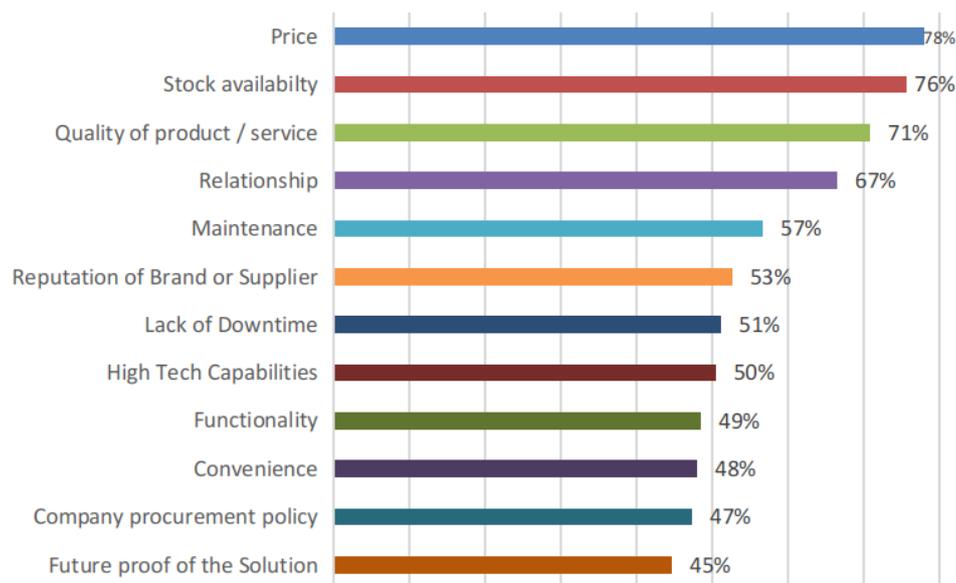
When manufacturing is split from other industries, a clearer picture emerges.



Other industries value Pricing as a far greater factor in selecting a technology at 93%, compared to the manufacturing sector at 71%, 22% lower.

When combining important with very important, items began to change their ranking. Price remained the key factor in overall importance, while the quality of the product or service fell below stock availability. The significance of this finding is companies are beginning to accept what's available above looking at quality of the product or service. This finding also ties directly to the top factor: price.

### Overall important factor in selecting a technology

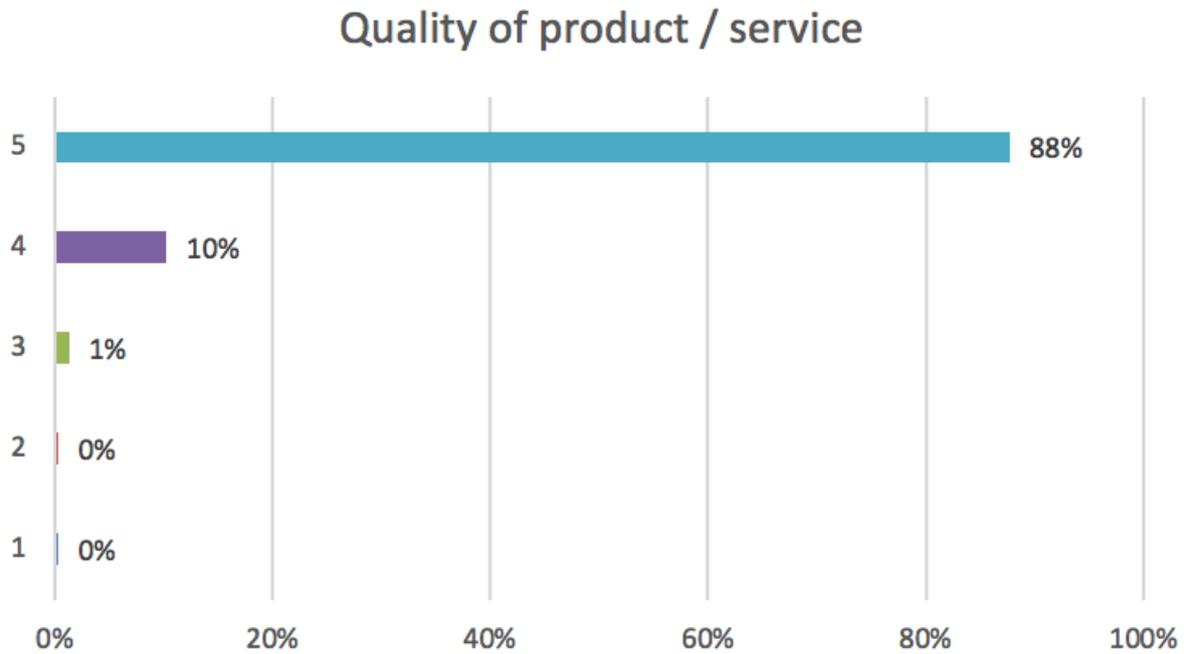


When including those respondents who ranked the criteria a 4, important; Price (78%), Stock availability (76%) and Quality of product or service (71%) are the three most prominent criteria.

Criteria	Important Overall (%)
Price	78%
Stock availability	76%
Quality of product / service	71%
Relationship	67%
Maintenance	57%
Reputation of Brand or Supplier	53%
Lack of Downtime	51%
High Tech Capabilities	50%
Functionality	49%
Convenience	48%
Company procurement policy	47%
Future proof of the Solution	45%

The following graphs below show each proportion of the responses in each category. The graphs below may seem inflated when compared to the graphs above. This is due to the exclusion of those who reported “not applicable”.

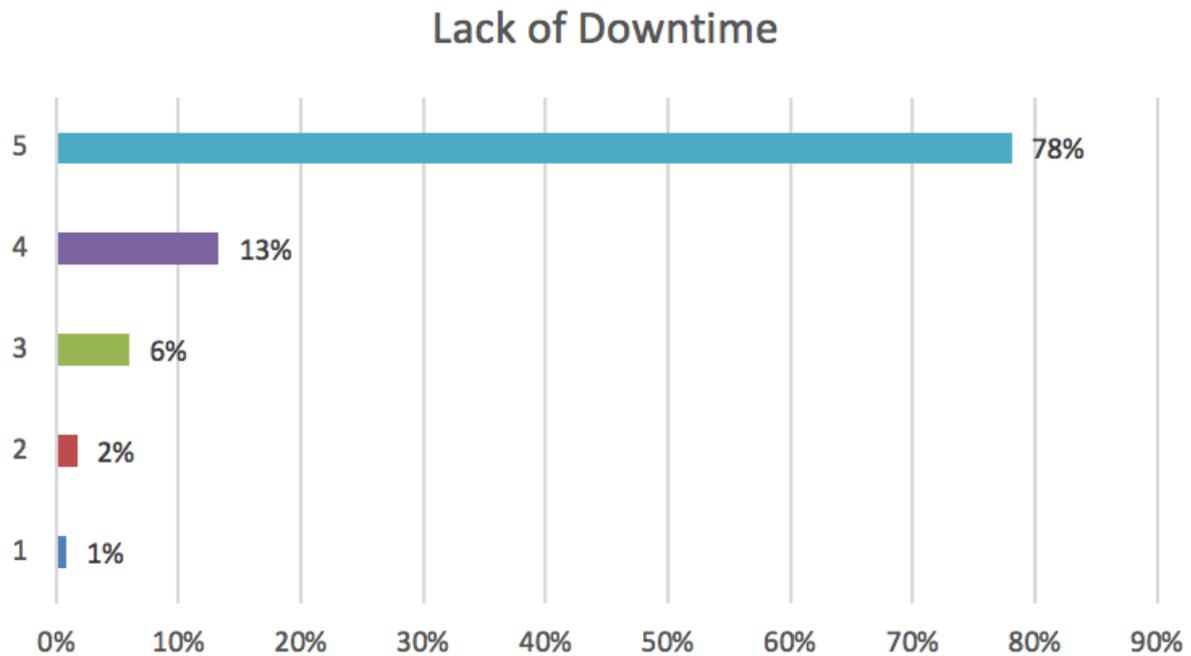
### Quality of Product/Service



The vast majority of respondents, 88%, rank product quality as important overall when selecting a technology provider. It is ranked very important by 98% within its group when those who didn’t answer were removed.

Importance	Respondents (%)
1	0%
2	0%
3	1%
4	10%
5	88%

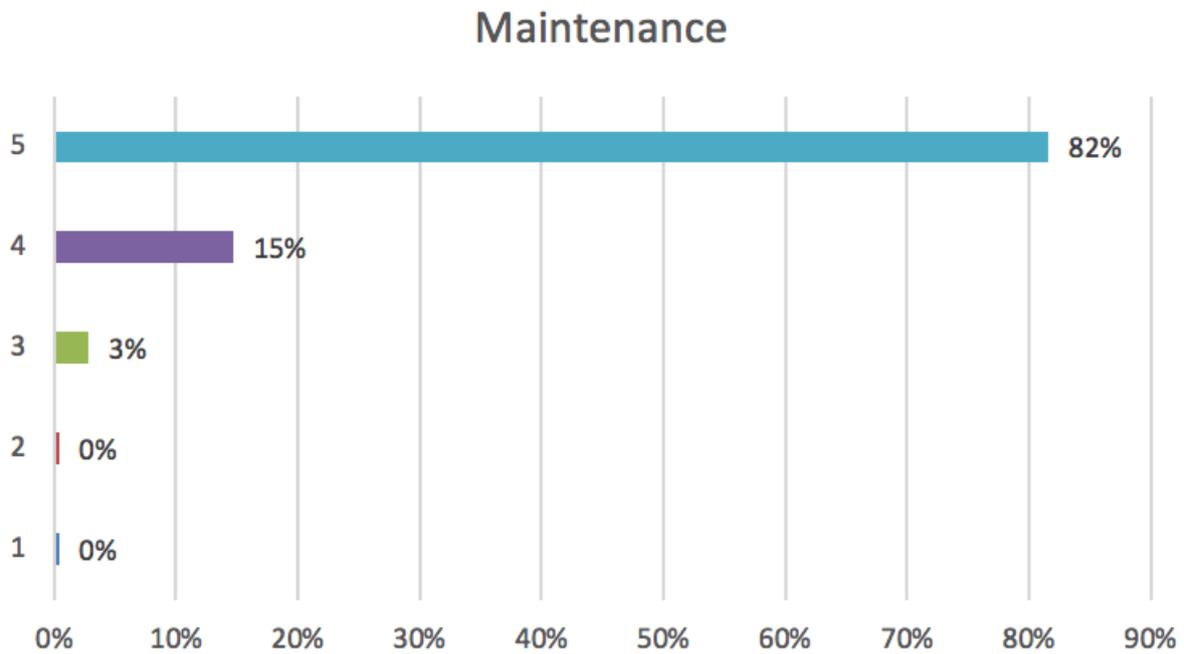
## Lack of Downtime



The vast majority of respondents, 78%, rank lack of downtime as important overall when selecting a technology provider. It is ranked very important by 91% within its group when those who didn't answer were removed.

Importance	Respondents (%)
1	1%
2	2%
3	6%
4	13%
5	78%

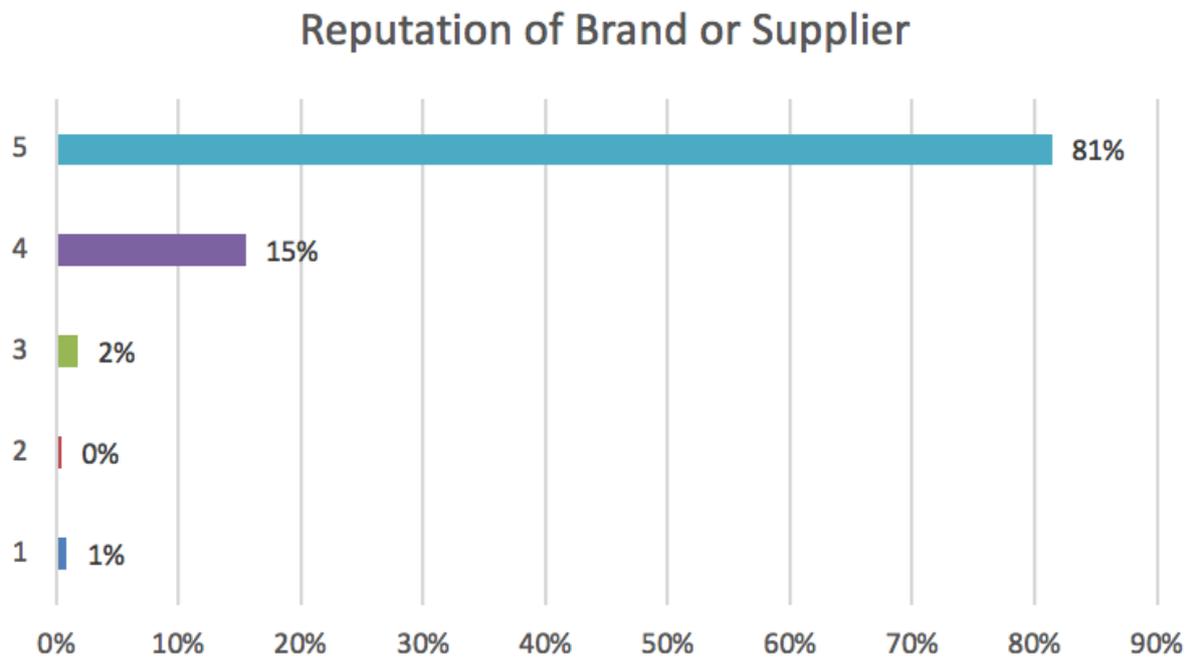
## Maintenance Provided



The vast majority of respondents, 82%, rank maintenance provided as important overall when selecting a technology provider. It is ranked very important by 97% within its group when those who didn't answer were removed.

<b>Importance</b>	<b>Respondents (%)</b>
1	0%
2	0%
3	3%
4	15%
5	82%

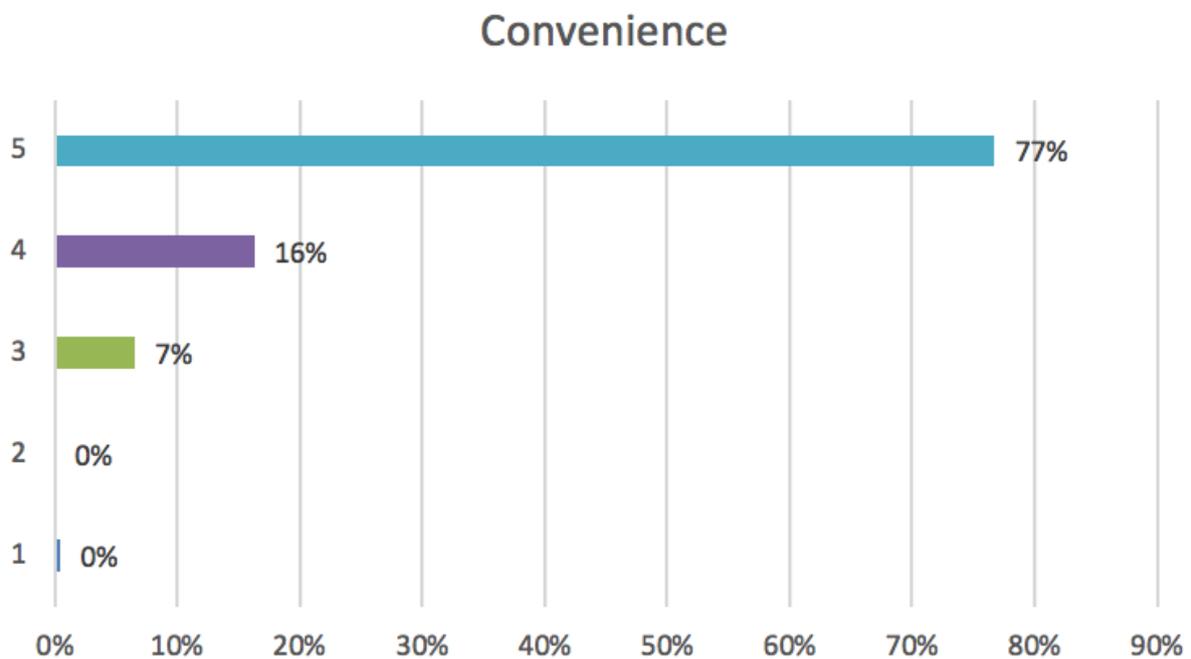
## Reputation of Brand or Supplier



The vast majority of respondents, 81%, rank reputation of brand or supplier as important overall when selecting a technology provider. It is ranked very important by 96% within its group when those who didn't answer were removed.

Importance	Respondents (%)
1	1%
2	0%
3	2%
4	15%
5	81%

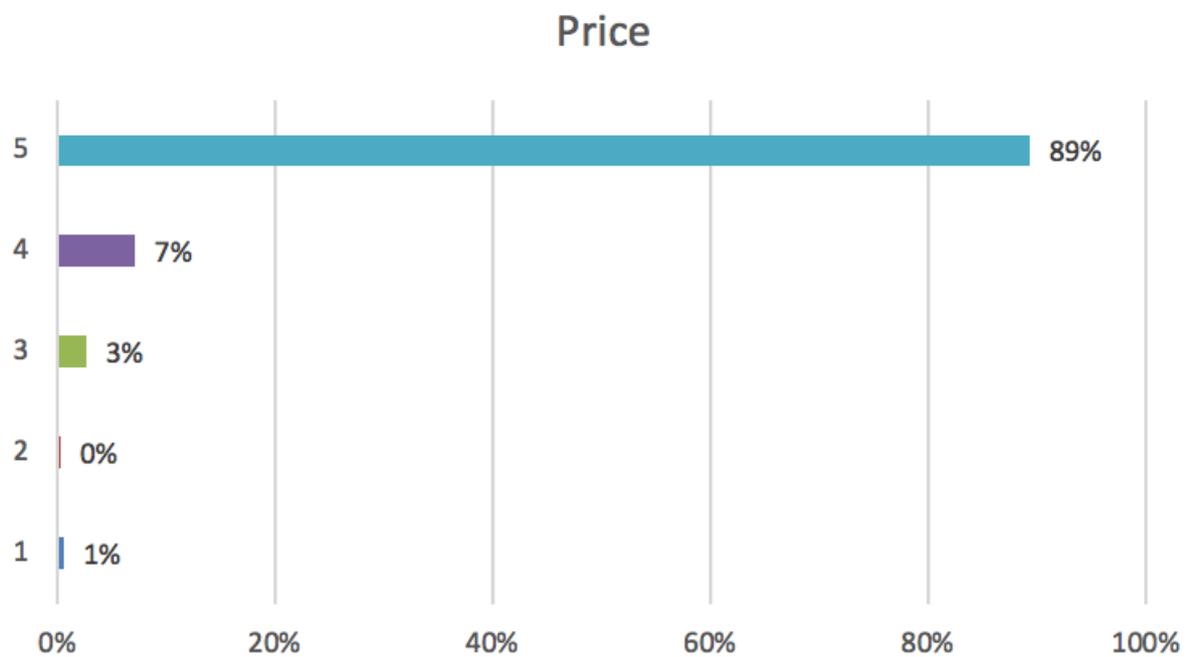
## Convenience of Process



The vast majority of respondents, 77%, rank convenience of the process as important overall when selecting a technology provider. It is ranked very important by 93% within its group when those who didn't answer were removed.

<b>Importance</b>	<b>Respondents (%)</b>
1	0%
2	0%
3	7%
4	16%
5	77%

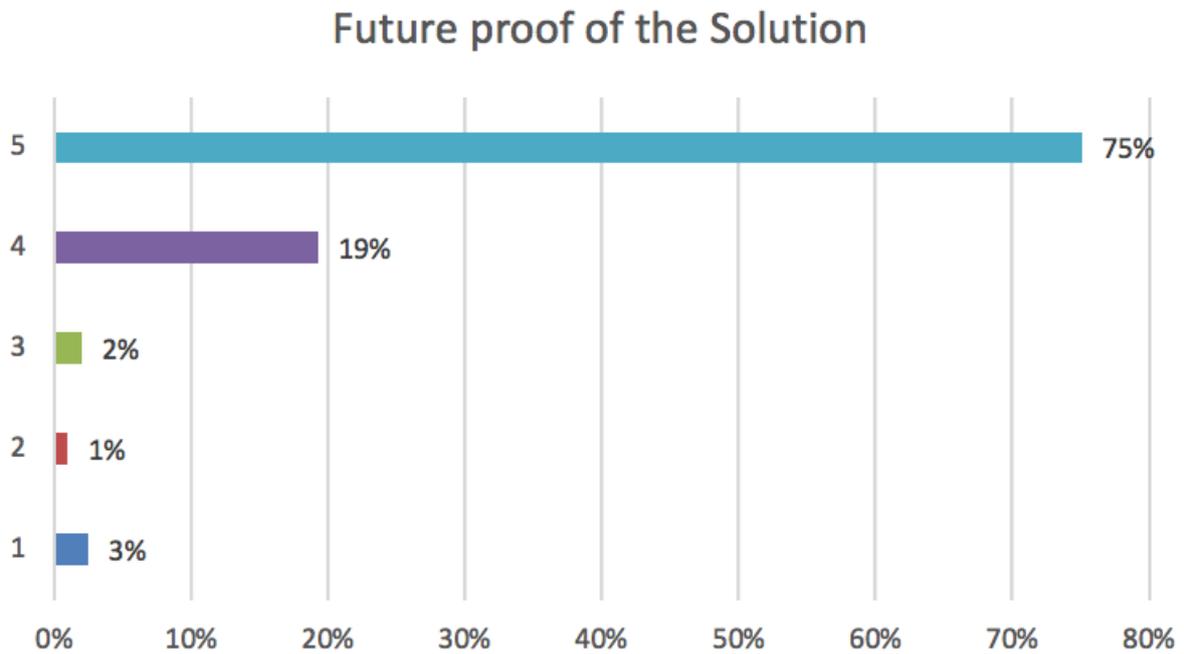
## Price



The vast majority of respondents, 89%, rank price as important overall when selecting a technology provider. It is ranked very important by 96% within its group when those who didn't answer were removed.

Importance	Respondents (%)
1	1%
2	0%
3	3%
4	7%
5	89%

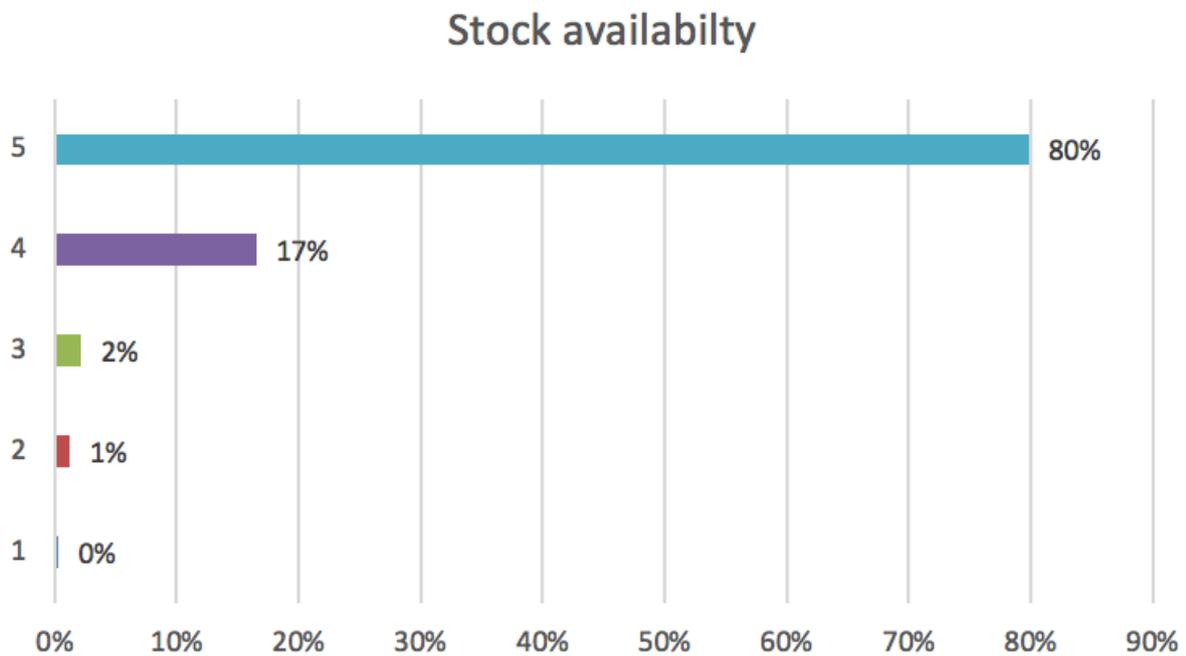
## Future Proof of Solution



The vast majority of respondents, 75%, rank future proof of solution as important overall when selecting a technology provider. It is ranked very important by 94% within its group when those who didn't answer were removed.

Importance	Respondents (%)
1	3%
2	1%
3	2%
4	19%
5	75%

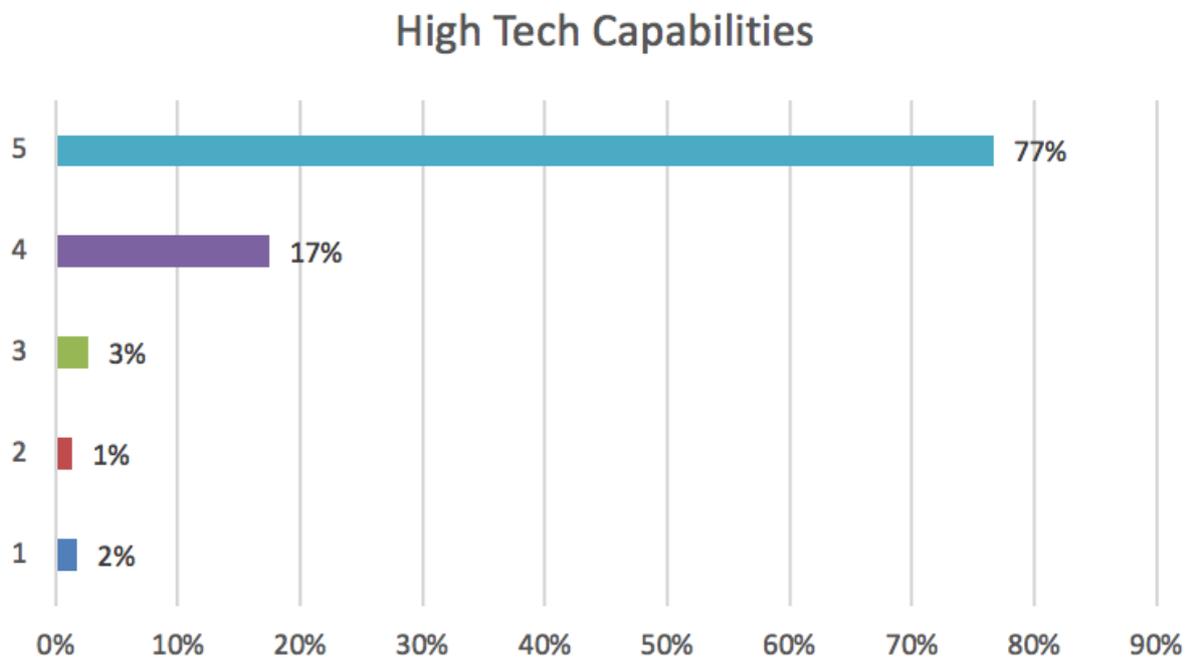
## Stock availability



The vast majority of respondents, 80%, rank stock availability as important overall when selecting a technology provider. It is ranked very important by 97% within its group when those who didn't answer were removed.

<b>Importance</b>	<b>Respondents (%)</b>
1	0%
2	1%
3	2%
4	17%
5	80%

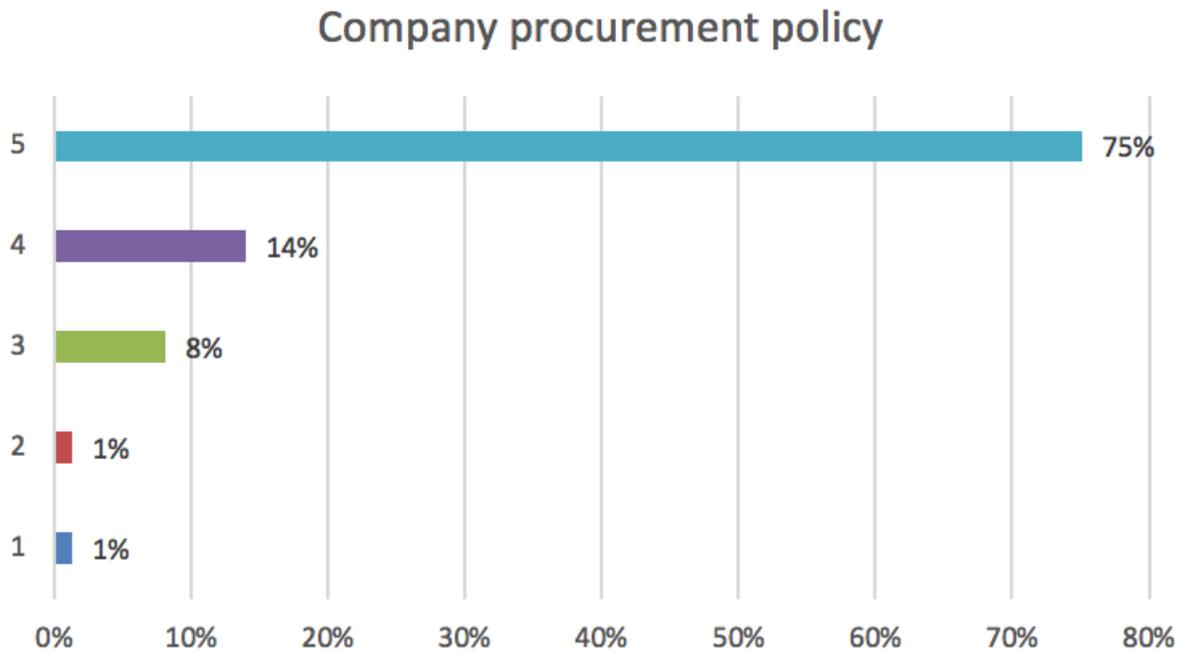
## High Tech Capabilities



The vast majority of respondents, 77%, rank the high tech capabilities of a solution as important overall when selecting a technology provider. It is ranked very important by 94% within its group when those who didn't answer were removed.

Importance	Respondents (%)
1	2%
2	1%
3	3%
4	17%
5	77%

## Company Procurement Policy

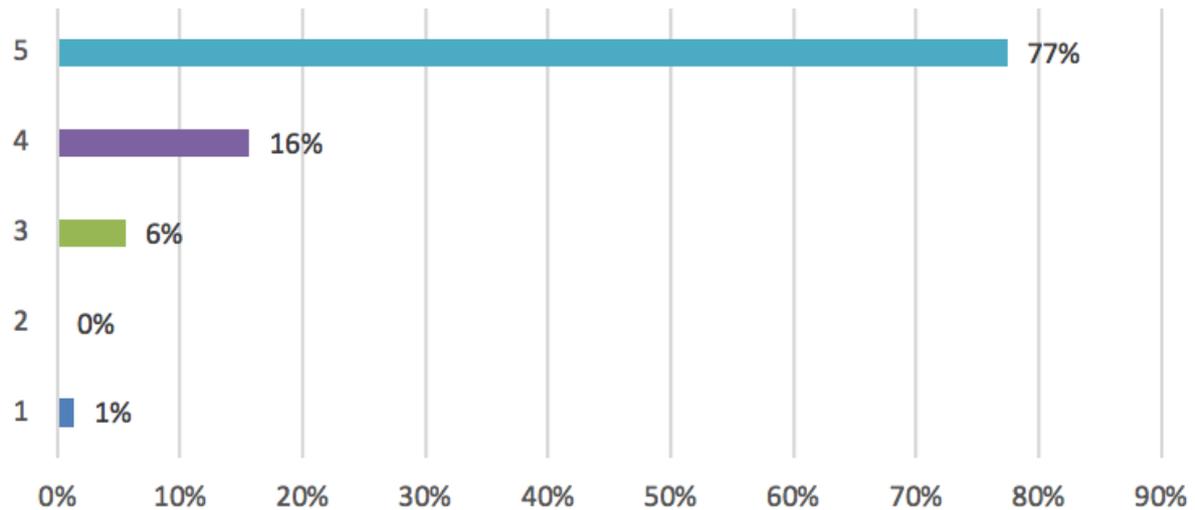


The vast majority of respondents, 75%, rank company procurement policy as important overall when selecting a technology provider. It is ranked very important by 89% within its group when those who didn't answer were removed.

Importance	Respondents (%)
1	1%
2	1%
3	8%
4	14%
5	75%

## Functionality

### Functionality (range of products/services on offer)

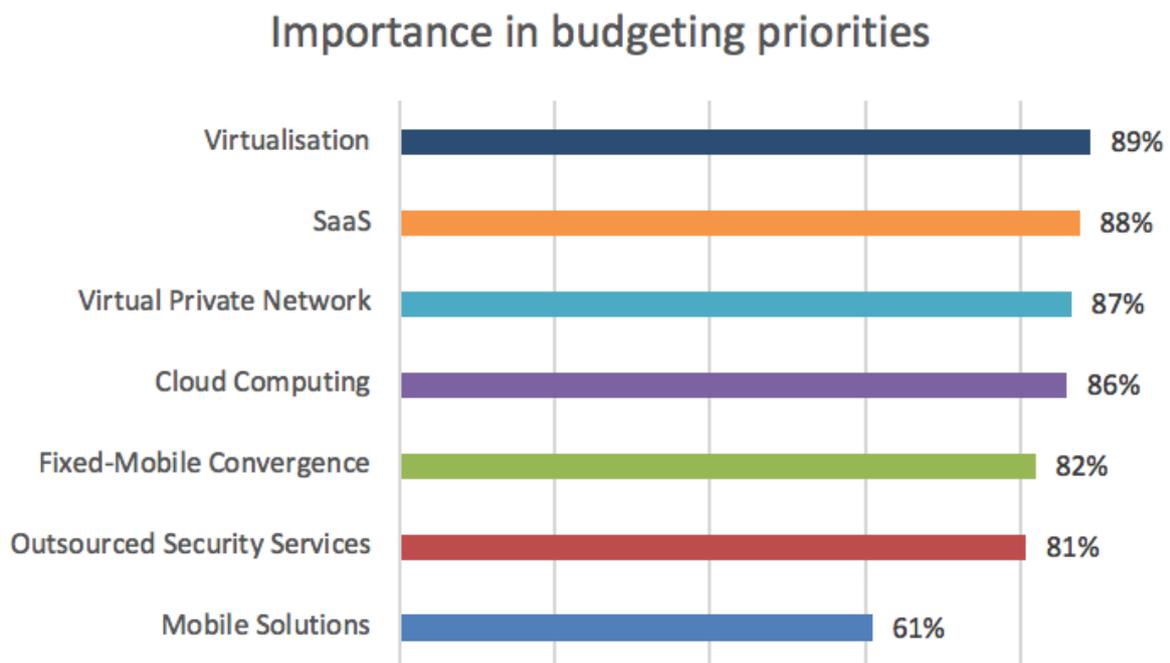


The vast majority of respondents, 77%, rank functionality of the solution as important overall when selecting a technology provider. It is ranked very important by 93% within its group when those who didn't answer were removed.

Importance	Respondents (%)
1	1%
2	0%
3	6%
4	16%
5	77%

## Importance of Technologies in Budgeting Priorities

Respondents were asked how important the various technologies were to their budgeting priorities, where 1 is unimportant and 5 is very important. The ratings for 5 (very important) were very practical in rating the technologies. A business will typically evaluate multiple technologies as important. The graph below shows the percentage of respondents who indicated that a particular technology was very important when selecting a technology provider.



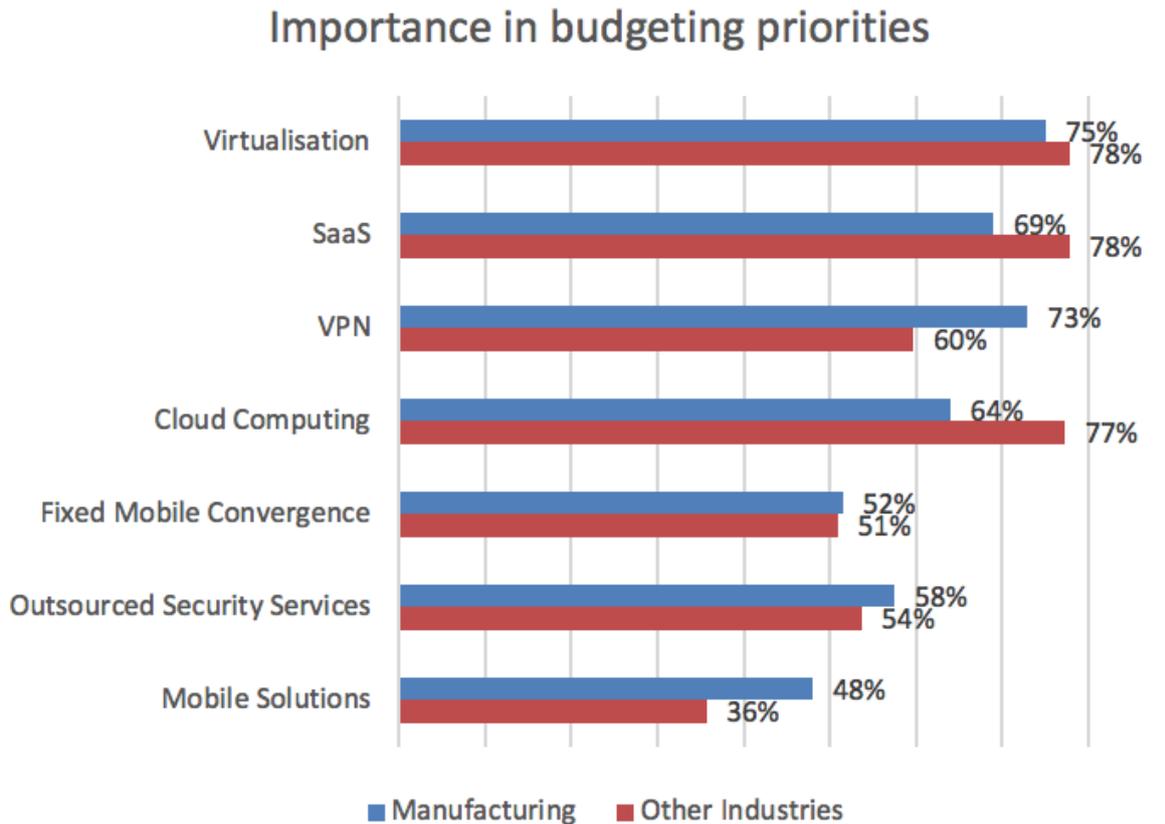
The three most important technologies in business budgeting priorities are Virtualisation (89%), Software as a Service (88%) and Virtual Private Networks (87%). These top three technologies indicate the strategic importance of cloud technologies in general in the South African corporation.

Importance in budgeting priorities	Manufacturing
Virtualisation	89%
SaaS	88%
VPN	87%
Cloud Computing	86%
Fixed Mobile Convergence	82%
Outsourced Security Services	81%
Mobile Solutions	61%



## Importance of Budgeting Priorities, by Manufacturing and Non-Manufacturing

These respondents were then split by manufacturing and non-manufacturing to gain a sense of which industries are placing more budgeting priority on specific technologies.



The areas with the largest parity are cloud computing and VPN technologies, both at 13%. In cloud computing, other industries are 13% ahead of the manufacturing sector, which are at 77% and 64% respectively. The picture changes when considering VPN technology, where the manufacturing sector is 13% ahead of other industries, at 73% and 60% respectively.

Importance in budgeting priorities	Manufacturing	Other Industries
Virtualisation	75%	78%
SaaS	69%	78%
VPN	73%	60%
Cloud Computing	64%	77%

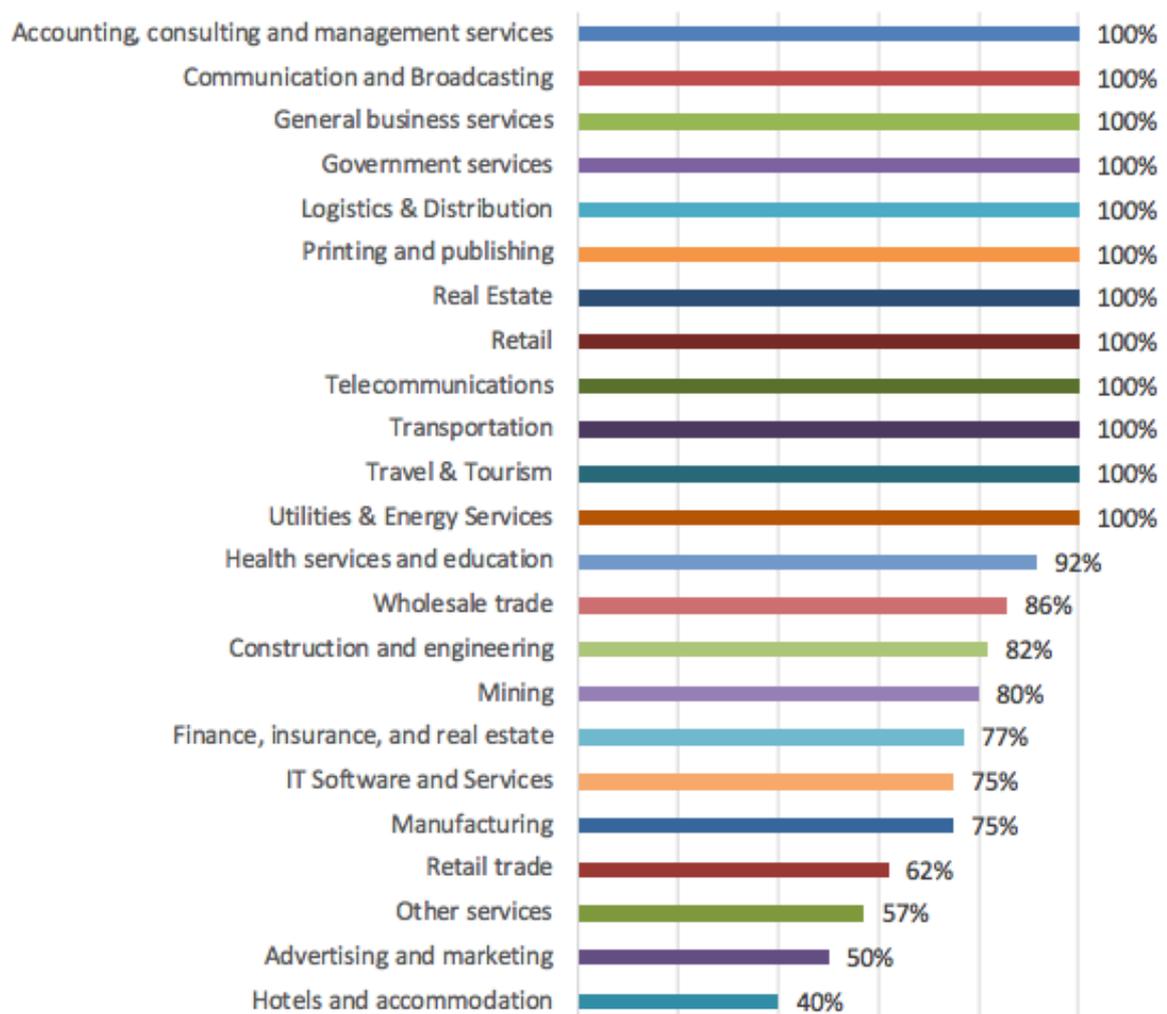
Fixed Mobile Convergence	52%	51%
Outsourced Security Services	58%	54%
Mobile Solutions	48%	36%

## Importance of Budgeting Priorities, by Industry

The following graphs show the percentage of respondents from each industry that indicated a particular technology is important overall, 4 or 5, in their company's budgeting priorities. It is important to note that certain industries may perform at 100% due to less respondents belonging to that industry.

### Virtualisation

#### NB in Budget: Virtualisation



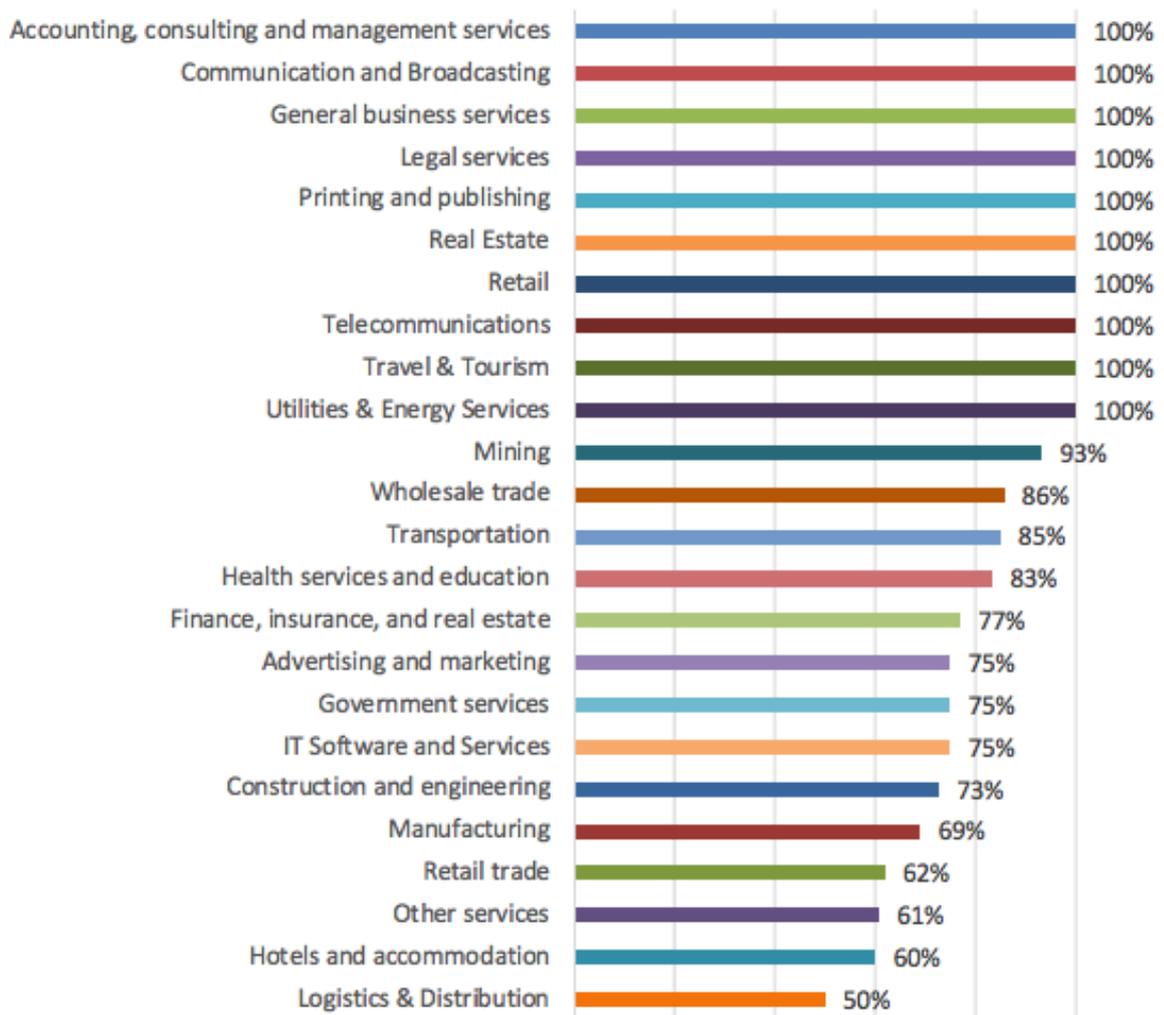
Every respondent from twelve industries, from accounting to utility services, ranked Virtualisation as important, or very important, in their budgets. This shows virtualisation is becoming increasingly important to a vast array of companies.

NB in Budget	Virtualisation
Accounting, consulting and management services	100%

Communication and Broadcasting	100%
General business services	100%
Government services	100%
Logistics & Distribution	100%
Printing and publishing	100%
Real Estate	100%
Retail	100%
Telecommunications	100%
Transportation	100%
Travel & Tourism	100%
Utilities & Energy Services	100%
Health services and education	92%
Wholesale trade	86%
Construction and engineering	82%
Mining	80%
Finance, insurance, and real estate	77%
IT Software and Services	75%
Manufacturing	75%
Retail trade	62%
Other services	57%
Advertising and marketing	50%
Hotels and accommodation	40%
Legal services	0%

## Software as a Service (SaaS)

### NB in Budget: SaaS

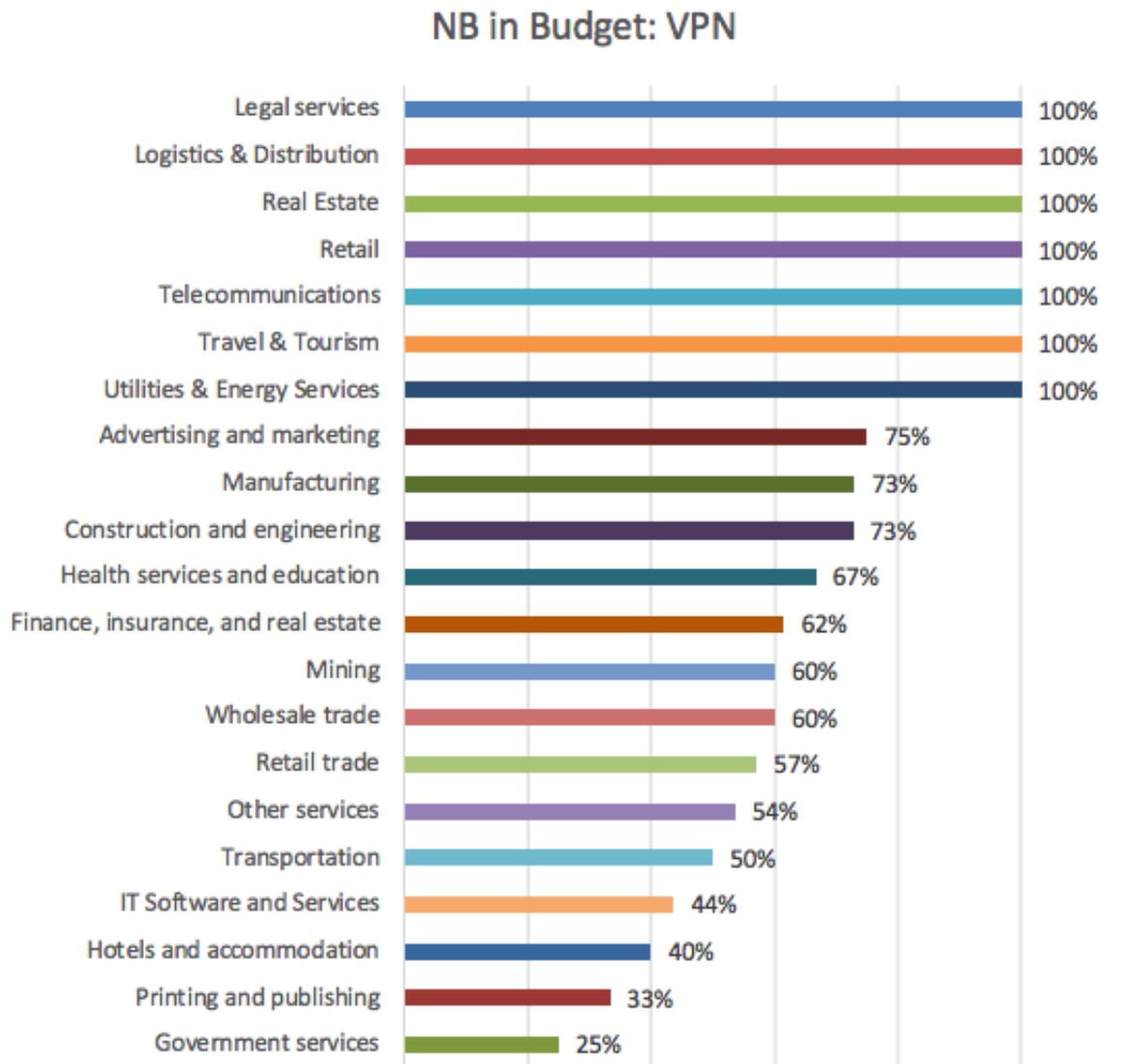


Every respondent from ten industries, from accounting to utility services, ranked Software as a service as important, or very important, in their budgets. This shows Software as a service is becoming increasingly important to a vast array of companies.

NB in Budget	Software-as-a-Service
Accounting, consulting and management services	100%
Communication and Broadcasting	100%
General business services	100%
Legal services	100%

Printing and publishing	100%
Real Estate	100%
Retail	100%
Telecommunications	100%
Travel & Tourism	100%
Utilities & Energy Services	100%
Mining	93%
Wholesale trade	86%
Transportation	85%
Health services and education	83%
Finance, insurance, and real estate	77%
Advertising and marketing	75%
Government services	75%
IT Software and Services	75%
Construction and engineering	73%
Manufacturing	69%
Retail trade	62%
Other services	61%
Hotels and accommodation	60%
Logistics & Distribution	50%

## VPN



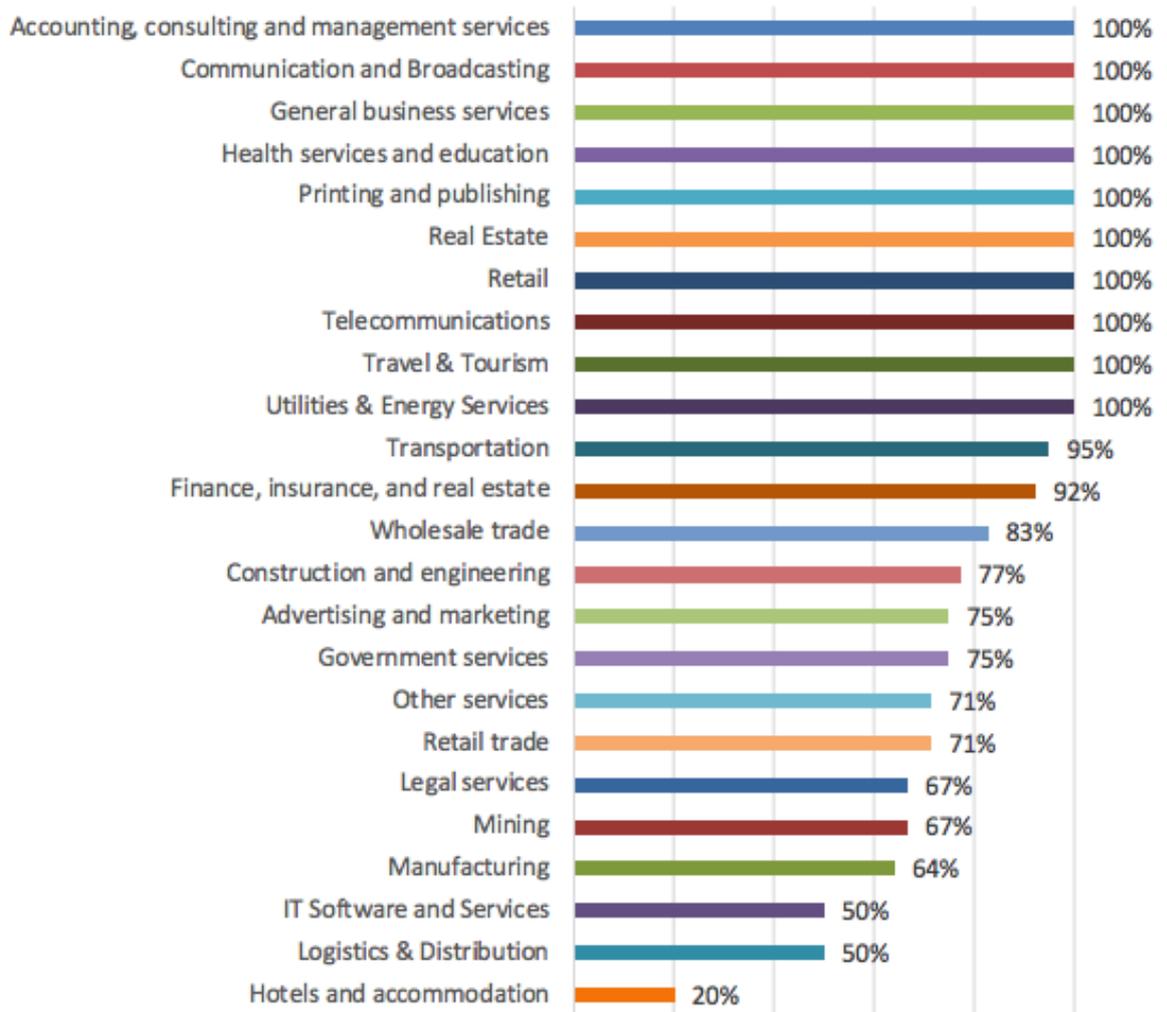
Every respondent from seven industries, from legal to utility services, ranked virtual private networks as important, or very important, in their budgets. This shows virtual private networks technology is becoming increasingly important to a vast array of companies.

NB in Budget	VPN
Legal services	100%
Logistics & Distribution	100%
Real Estate	100%
Retail	100%
Telecommunications	100%

Travel & Tourism	100%
Utilities & Energy Services	100%
Advertising and marketing	75%
Manufacturing	73%
Construction and engineering	73%
Health services and education	67%
Finance, insurance, and real estate	62%
Mining	60%
Wholesale trade	60%
Retail trade	57%
Other services	54%
Transportation	50%
IT Software and Services	44%
Hotels and accommodation	40%
Printing and publishing	33%
Government services	25%
Accounting, consulting and management services	0%
Communication and Broadcasting	0%
General business services	0%

## Cloud Computing

### NB in Budget: Cloud Computing



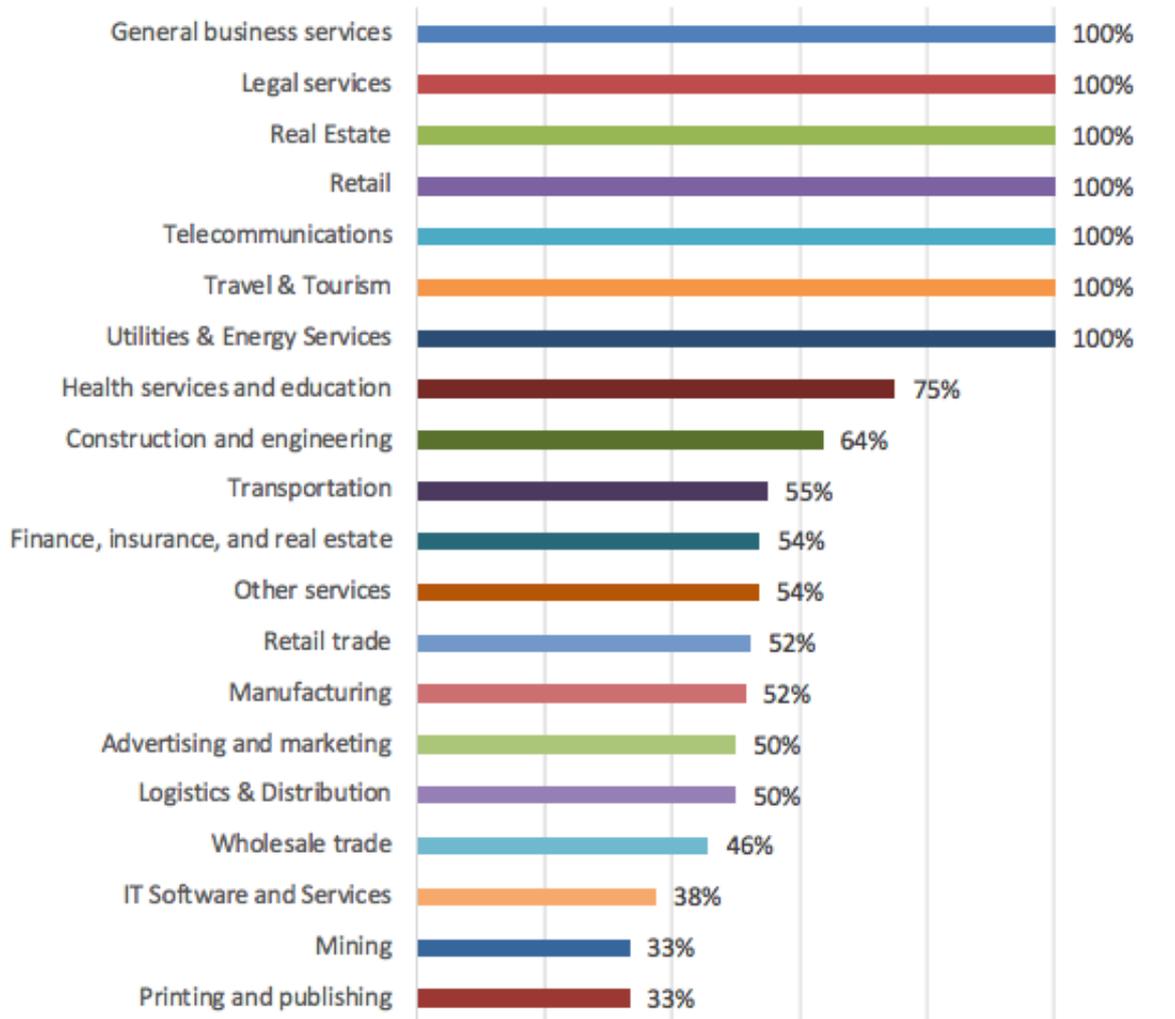
Every respondent from ten industries, from accounting to utility services, ranked Cloud computing as important, or very important, in their budgets. This shows Cloud computing is becoming increasingly important to a vast array of companies.

NB in Budget	Cloud Computing
Accounting, consulting and management services	100%
Communication and Broadcasting	100%
General business services	100%
Health services and education	100%
Printing and publishing	100%
Real Estate	100%

Retail	100%
Telecommunications	100%
Travel & Tourism	100%
Utilities & Energy Services	100%
Transportation	95%
Finance, insurance, and real estate	92%
Wholesale trade	83%
Construction and engineering	77%
Advertising and marketing	75%
Government services	75%
Other services	71%
Retail trade	71%
Legal services	67%
Mining	67%
Manufacturing	64%
IT Software and Services	50%
Logistics & Distribution	50%
Hotels and accommodation	20%

## Fixed Mobile Convergence

### NB in Budget: Fixed Mobile Convergence



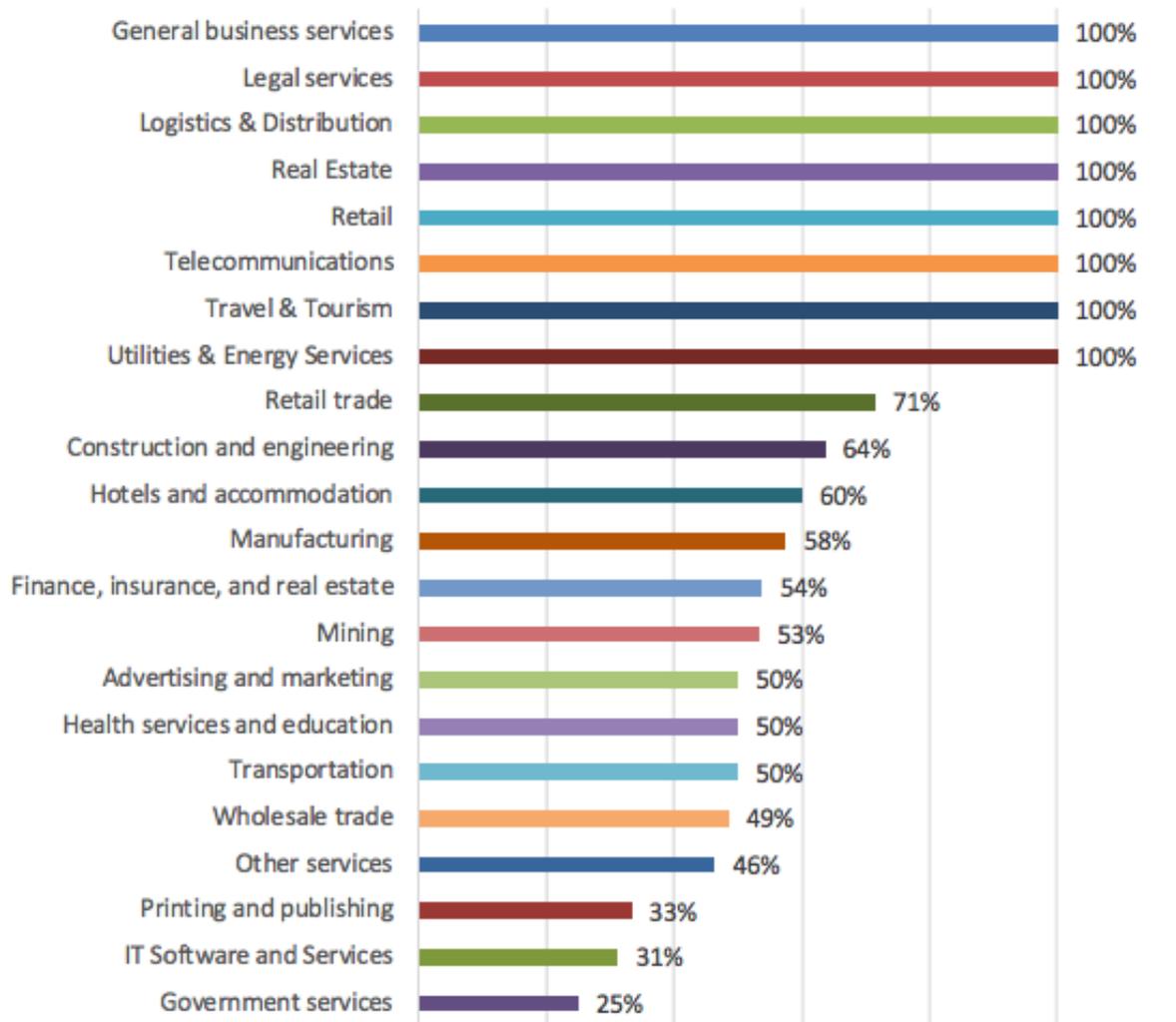
Every respondent from seven industries, from general business to legal services, ranked Fixed mobile convergence as important, or very important, in their budgets.

NB in Budget	Fixed Mobile Convergence
General business services	100%
Legal services	100%
Real Estate	100%
Retail	100%
Telecommunications	100%
Travel & Tourism	100%

Utilities & Energy Services	100%
Health services and education	75%
Construction and engineering	64%
Transportation	55%
Finance, insurance, and real estate	54%
Other services	54%
Retail trade	52%
Manufacturing	52%
Advertising and marketing	50%
Logistics & Distribution	50%
Wholesale trade	46%
IT Software and Services	38%
Mining	33%
Printing and publishing	33%
Accounting, consulting and management services	0%
Communication and Broadcasting	0%
Government services	0%
Hotels and accommodation	0%

## Outsourced Security Services

### NB in Budget: Outsourced Security



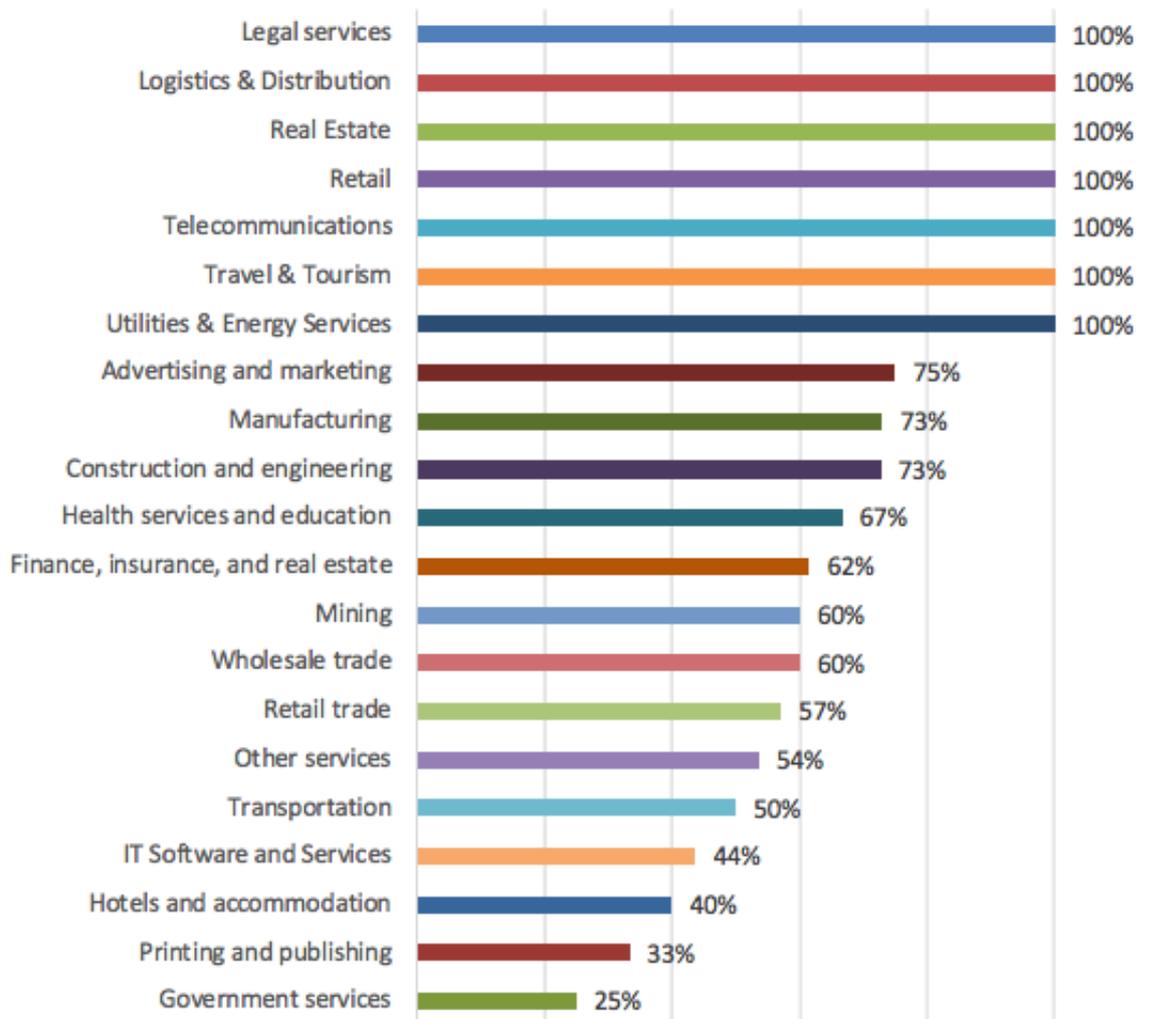
Every respondent from eight industries, from general business to utility services, ranked Outsourced security services as important, or very important, in their budgets. This shows Outsourced security services are becoming increasingly important to a vast array of companies.

NB in Budget	Outsourced Security Systems
General business services	100%
Legal services	100%
Logistics & Distribution	100%
Real Estate	100%
Retail	100%

Telecommunications	100%
Travel & Tourism	100%
Utilities & Energy Services	100%
Retail trade	71%
Construction and engineering	64%
Hotels and accommodation	60%
Manufacturing	58%
Finance, insurance, and real estate	54%
Mining	53%
Advertising and marketing	50%
Health services and education	50%
Transportation	50%
Wholesale trade	49%
Other services	46%
Printing and publishing	33%
IT Software and Services	31%
Government services	25%
Accounting, consulting and management services	0%
Communication and Broadcasting	0%

## Mobile Solutions

### NB in Budget: Mobile Solutions



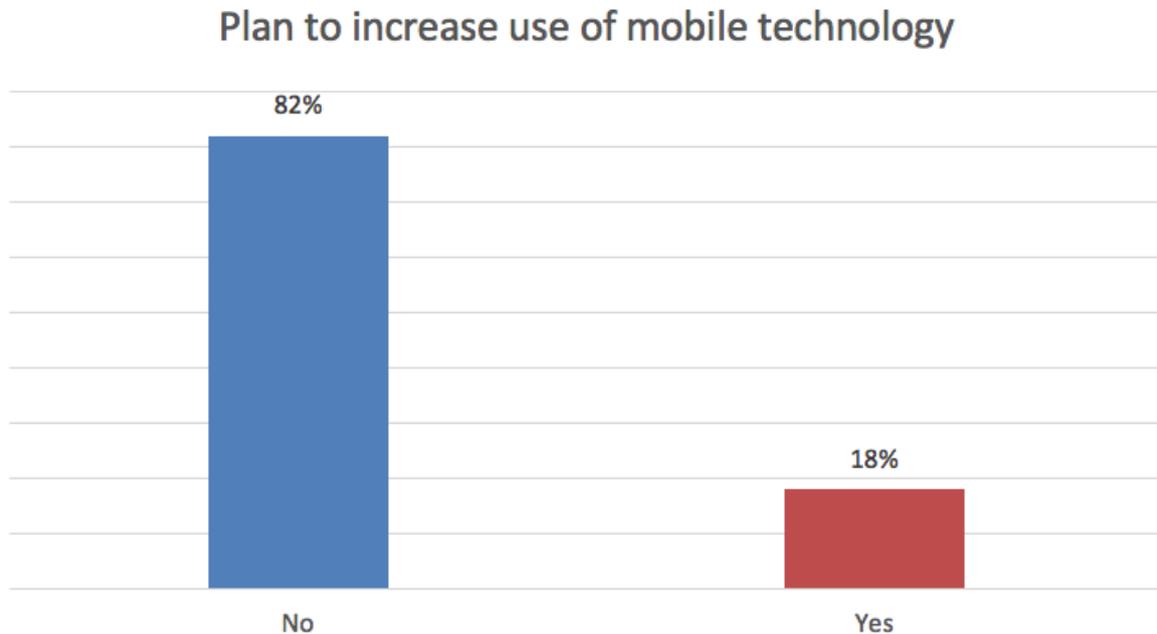
Every respondent from seven industries, from general business to utility services, ranked Outsourced security services as important, or very important, in their budgets. This shows Outsourced security services are becoming increasingly important to a vast array of companies.

NB in Budget	Mobile Solutions
Logistics & Distribution	100%
Real Estate	100%
Retail	100%
Telecommunications	100%
Travel & Tourism	100%

Utilities & Energy Services	100%
Advertising and marketing	50%
Manufacturing	48%
Retail trade	43%
Construction and engineering	41%
Transportation	40%
Wholesale trade	34%
Health services and education	33%
Legal services	33%
Printing and publishing	33%
Other services	32%
Mining	27%
IT Software and Services	25%
Finance, insurance, and real estate	23%
Hotels and accommodation	20%
Accounting, consulting and management services	0%
Communication and Broadcasting	0%
General business services	0%
Government services	0%

## Plan to Increase Use of Mobile Technology

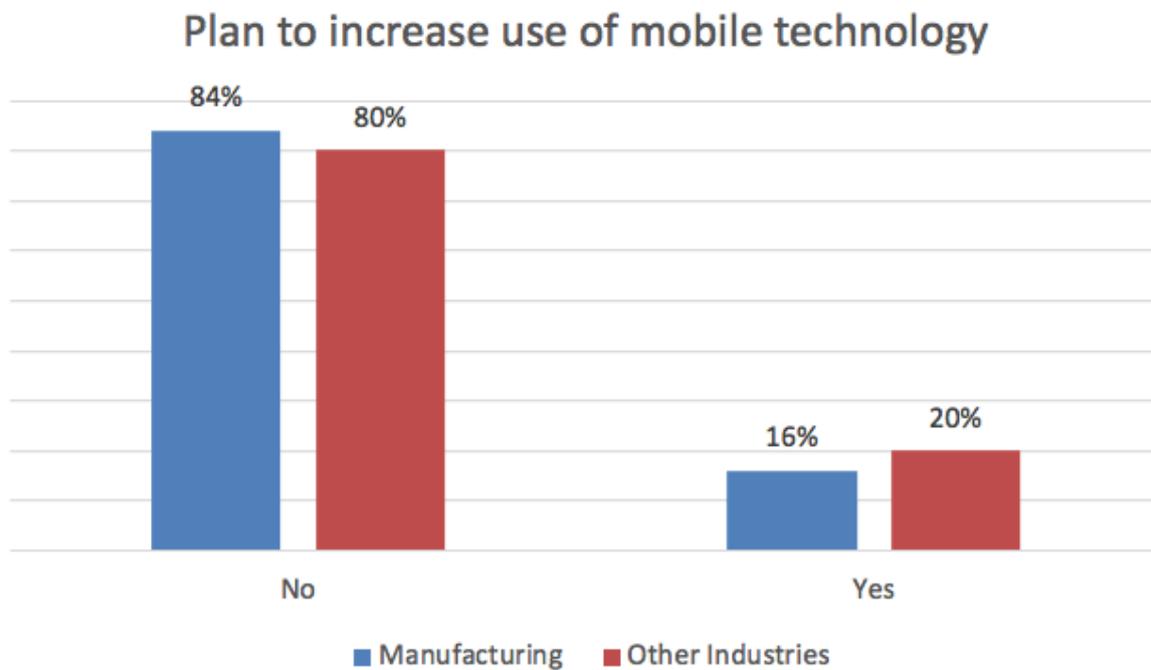
Respondents were asked whether they had plans to increase their mobile business software usage.



A staggering 82% of respondents said that they were not planning to increase mobile business software usage. Although this proportion is high, it may indicate that businesses are comfortable with the level of mobility and existing mobile functionalities.

Plan to increase use	Percentage (%)
Yes	18%
No	82%

## Plan to Increase Use of Mobile Technology, by Manufacturing and Other Industries



Slightly fewer respondents from the manufacturing sector reported that they planned to increase their use of mobile technology. This shows the manufacturing sector may be using more mobile technology, to the point of being satisfied with their current level of mobility.

Plan to increase use of mobile technology	No	Yes
Manufacturing	84%	16%
Other Industries	80%	20%