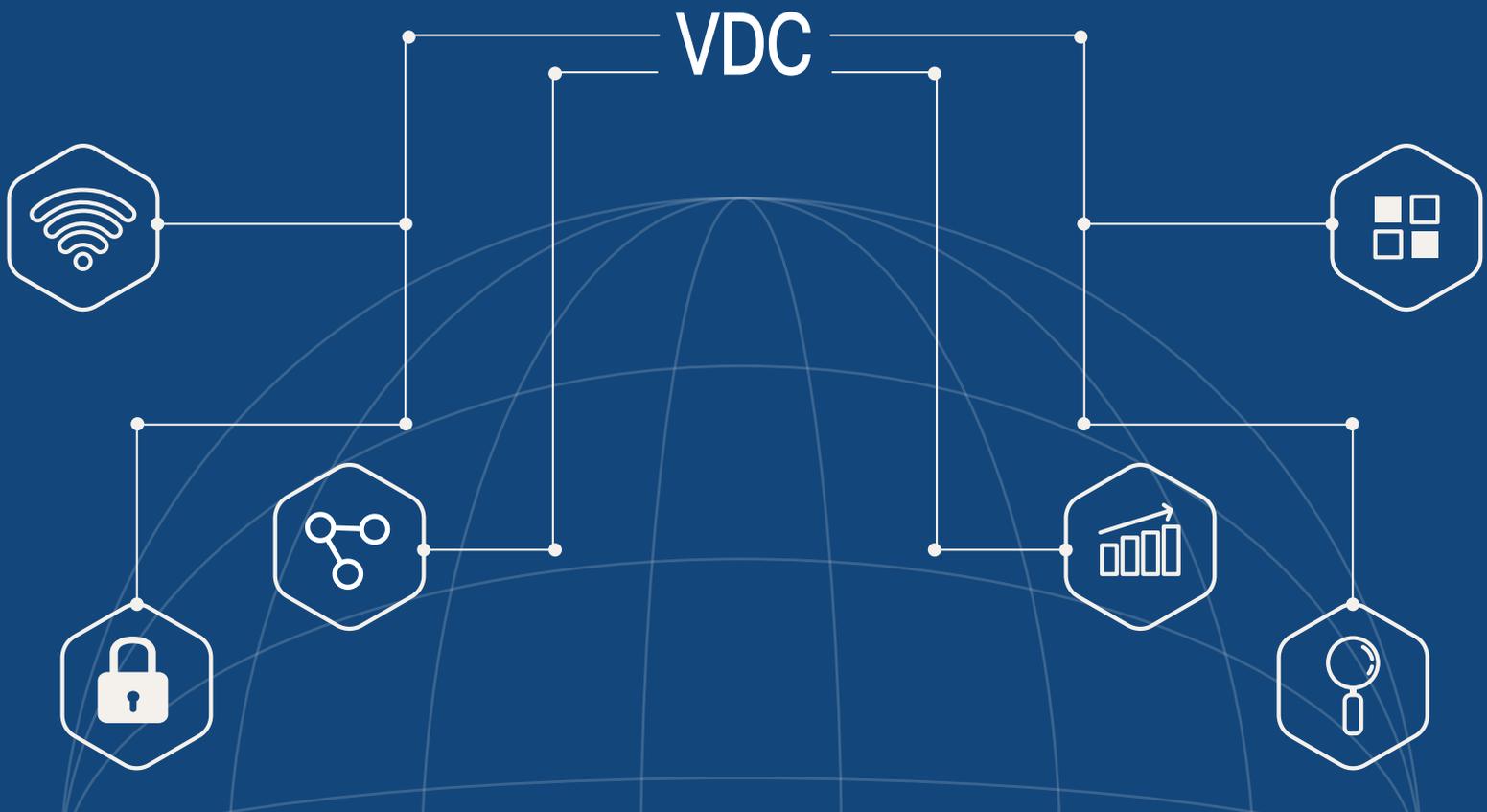


# EXECUTIVE BRIEF

# Enterprise Mobility Total Cost of Ownership



# Inside This Report

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This report covers the lifecycle costs of enterprise mobility solutions specifically supporting firstline mobile workers. Supported by a survey fielded among enterprise mobility technology decision makers, the research assesses the total cost of ownership of these critical digital assets from acquisition and deployment through support and end of life. The research takes a close look at the myriad issues that often complicate these solutions and the impact of any issues – be it hardware, software or network related – on workflows. The research also takes a close look at the impact of mobile analytics to better identify issues before they occur and the management and support infrastructure required to provide the necessary visibility. This report offers enterprise mobility decision makers with critical intelligence to support their investment decisions.

## What Questions Are Addressed?

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- > What is the impact of issues experienced by enterprise mobility solutions on workflows?
- > What factors most commonly lead to enterprise mobility solution disruption?
- > How do non-rugged grade mobile devices compare to rugged grade / enterprise class mobile devices?
- > How has the definition of rugged/enterprise class mobile devices evolved? What are the benefits of this class of mobile device?
- > How much visibility do organizations have today into how their mobile solutions are operating and are being used?
- > How are analytics factoring into how organizations are identifying and addressing potential enterprise mobility issues prior to them occurring?
- > Why has consistent mobile device lifecycle support grown in importance in regards to TCO analysis? How can an enterprise ensure consistent lifecycle support for its mobile devices?

## Who Should Read This Report?

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The target audience for this report is decision-makers within, marketing, product development, and sales/business development roles at mobile hardware OEMs as well as system integrators, value-added resellers, and distributors. In addition, end-users with enterprise mobility purchasing, specification, and/or support responsibilities would benefit from reading this report.

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# Executive Summary

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Enterprises over the course of the past few years have encountered significant disruption through the increasing demands for faster processes, quicker manufacturing and transportation of products for consumers. These pressures are leading to accelerated rollout of mobile/digital solutions that enable the workforce to become more productive, collaborative and connected. Deployment of the proper mobile solution can boost workflows, improve employee productivity, provide greater visibility and data analytics into processes, and reduce costs.

However, it is critical for enterprises to align their workflows and use cases with the best-fit mobile solutions. While well designed mobile solutions can become a significant productivity multiplier, the opposite is also true. Poorly designed enterprise mobility solutions – from device selection to application design, network performance and support infrastructure – can all contribute to workflow disruption, employee frustration and potentially the erosion of customer confidence. Thus, a holistic or comprehensive approach to evaluating mobile solutions that emphasizes not only the upfront adoption costs or year one functionality but looks at the complete lifecycle is critical.

TCO should include factors such as: cost of adoption, training costs, support costs, mobile device replacement costs over the course of the product lifecycle, opportunity cost due to productivity lost and mobile device downtime, etc. This report dives into the complexity of mobile solution TCO, how enterprises should go about their mobile device deployment, and providing greater insight to mobile technology decision makers looking to bring modern technology to their workflows.

## Key Findings

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- > The expansion of the definition of rugged/enterprise class mobile devices to go beyond simply the physical characteristics that prevent damage when dropped, exposed to water, etc. VDC Research believes it is important to take a more holistic approach to the product's lifecycle and how the device is managed and supported once deployed i.e. failure does not necessarily mean physical damage, but rather it means the device is not working 'as intended', and causing workflow disruption.
- > Reliability, ease of use, and data capture capabilities are primary factors in selecting mobile devices. Key factors such as battery life, strength of network connectivity in addition to durable/rugged design are all critical to deliver a reliable mobile device solution.
- > Consumer devices continue to improve durability and reliability, but lack consistent lifecycle management, significantly impacting TCO. This consistent lifecycle management is critical for B2B solutions as enterprises look to use devices for 3 to 5 years, as opposed to the typical consumer grade product life of 2 to 3 years. Batteries not lasting an entire shift drastically reduce productivity. Average productivity lost due to battery's having no charge is 50 minutes. Especially in business critical processes, an hour of downtime translates into significant lost productivity and represents a very large opportunity cost for the enterprise, which needs to be represented in TCO.
- > Network connectivity is another key issue that remains to be addressed. Many mobile devices are deployed in big environments such as manufacturing plants, warehouses, distribution/logistical centers, or out in the field. Network connectivity is unreliable, causing more downtime, and negatively impacting battery charge. Enterprise Mobile Management (EMM)/ Mobile Device Management (MDM) are seen as critical infrastructure to support enterprise mobility solutions and provide visibility into their status. Evidence suggests EMM/MDM has been very effective in monitoring batteries, productivity, collecting data, improving workflows, and more. In environments where mobile device functionality is vital to operations, EMM/MDM is even more critical to ensure mobile device operability.
- > The research suggests that it is not uncommon for enterprises to select a form factor that does not fully fit the enterprises business needs. It's vital to TCO to optimize productivity and workflows, so while choosing between rugged and non-rugged mobile devices is a factor in TCO analysis, form factor can be just as vital of a consideration for the enterprise.

# About The Authors

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Chris Paggioli

**Chris Paggioli** is a market research and consulting professional within VDC's Enterprise Mobility team. He supports a range of syndicated and custom research reports on a number of topics. Chris brings skills in financial and economic analysis alongside a passion for technology in order to help create valued deliverables to clients. Chris holds a B.S. in Economics-Finance from Bentley University, where he also received his M.S. in Finance as a part of their accelerated program.

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David Krebs

**David Krebs** has more than 10 years of experience covering the markets for enterprise and government mobility solutions, wireless data communication technologies, and automatic data-capture research and consulting. David focuses on identifying the key drivers and enablers in the adoption of mobile and wireless solutions among mobile workers in the extended enterprise. David's consulting and strategic advisory experience is far reaching and includes technology and market opportunity assessments, technology penetration and adoption enablers, partner profiling and development, new product development, and M&A due diligence support. David has extensive primary market research management and execution experience to support market sizing and forecasting, total cost of ownership (TCO), comparative product performance evaluation, competitive benchmarking, and end-user requirements analysis. David is a graduate of Boston University (BSBA).

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# About VDC Research

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Founded in 1971, VDC Research provides in-depth insights to technology vendors, end users, and investors across the globe. As a market research and consulting firm, VDC's coverage of AutoID, enterprise mobility, industrial automation, and IoT and embedded technologies is among the most advanced in the industry, helping our clients make critical decisions with confidence. Offering syndicated reports and custom consultation, our methodologies consistently provide accurate forecasts and unmatched thought leadership for deeply technical markets. Located in Natick, Massachusetts, VDC prides itself on its close personal relationships with clients, delivering an attention to detail and a unique perspective that is second to none.



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