# FreshWave

# Enterprise Connectivity Matters

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We live in the digital age. Being connected at all times is hugely important for every person and for every organisation. This is especially true as companies undergo varying degrees of digital transformation, and place more and more critical data and systems in the cloud.

Equally, the Internet is an undeniably important channel for many businesses to sell their products and services; for many it is the only platform. This all means that always-on, reliable connections to a mobile workforce, partners and customers are now a true necessity.

It could be argued that this is well known. However, with the level of dependence on connectivity on the rise it is imperative to understand the levels of importance that companies attach to different types of digital connectivity. What specific role does mobile connectivity play in their business? What challenges do they experience? And what are the impact of those challenges?

This report is based on survey research carried out by CCS Insight on behalf of the Freshwave Group in December 2019. The survey examined attitudes to digital connectivity in the workplace, with a particular focus on mobile connectivity in enterprise offices.

We posed questions to 500 senior executives with a range of responsibilities (see below). They all worked in medium and large organisations with 100 to 500 employees in the UK, and with at least half of their workforce based in an office.

39%

18%

24%

39%

- CEO
- CTO
- CIO
- Other senior IT decision-maker
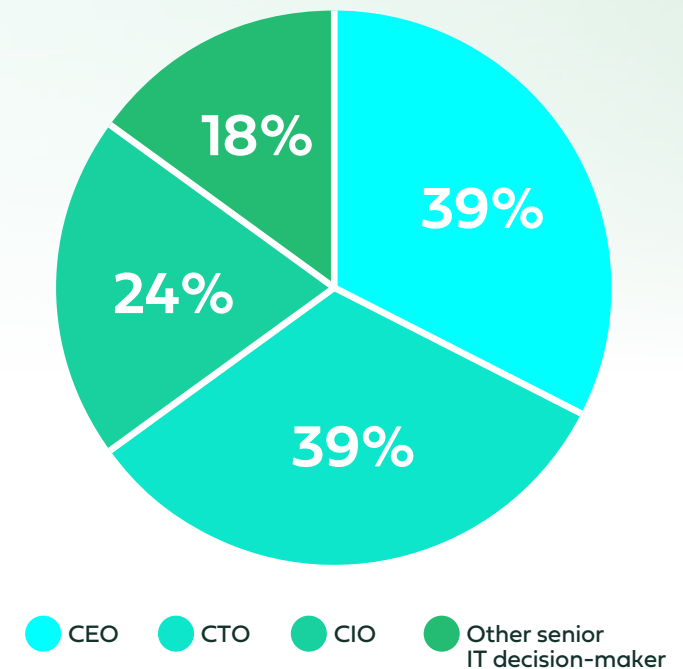
## We don't always appreciate how essential connectivity has become in our lives until we lose it.

We asked 500 senior executives how long their organisation could survive without any connectivity whatsoever (Wi-Fi, fixed line and mobile) before their business became critically affected. Over a quarter of them (27%) expect an immediate critical impact on the business, and 66% would be unable to function properly within an hour of losing connectivity.

In this context, it is no surprise that 57% of senior executives see digital connectivity as business-critical; another 40% see it as highly important.

## If you lost all digital connectivity, how long would it be before your business is critically affected?

**27%**
Immediately

**66%**
Within one business hour

**91%**
Within half a business day

3
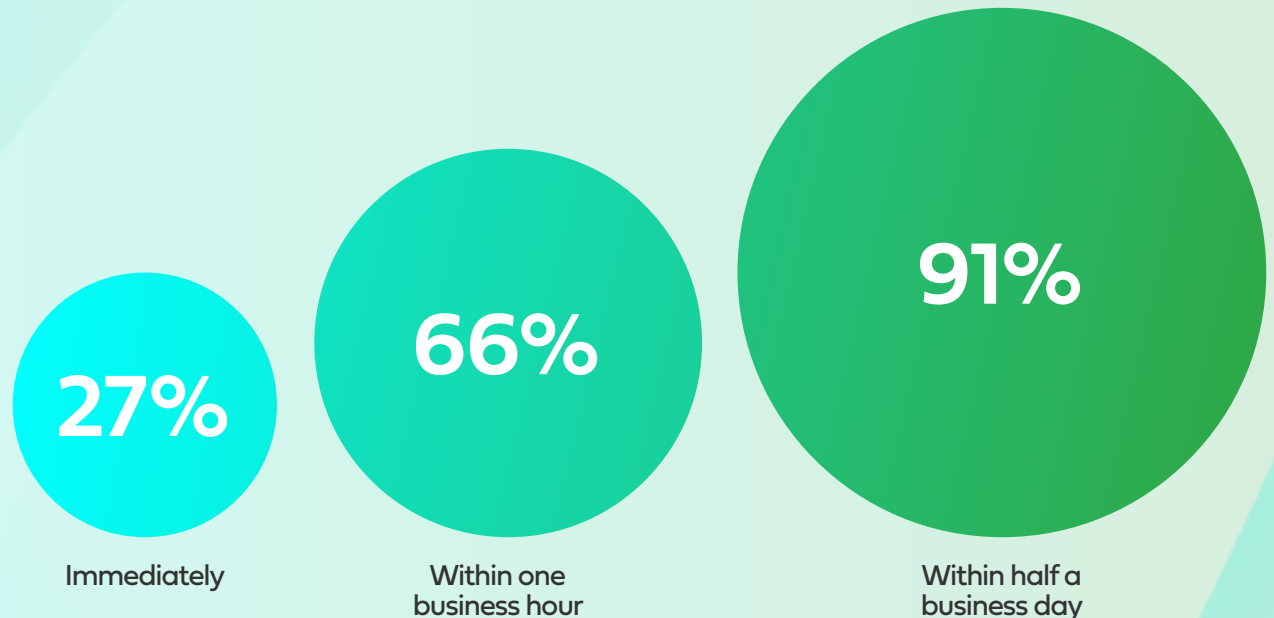
# The rising importance of mobile connectivity in the office

In most office environments the principal form of connectivity is delivered over a fixed-line broadband and Wi-Fi infrastructure, connecting PCs, laptops, servers, other office equipment and machines to the Internet. But mobile connectivity, once considered important only outside the office, is fast becoming a vital element of the office environment: almost 40% of our survey respondents view it as business-critical.

Crucially:

- 97% of executives agree that mobile connectivity today is more important than it was two years ago

- 94% believe that it will be even more important in two years' time

- And 87% expect it to be business-critical at that point

## How important is mobile/cellular connectivity for your organisation?

**It is more important than it was two years ago**
56% | 41% | 3%

**In two years' time it will be more important than it is now**
44% | 50% | 6%
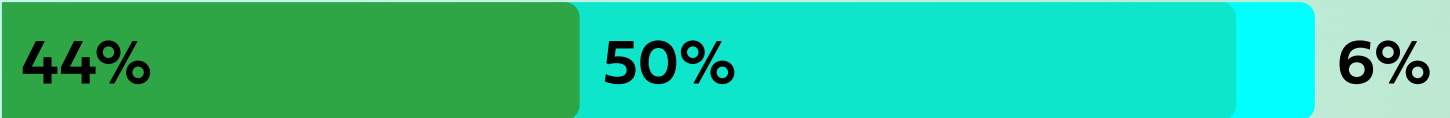
**In two years' time it will be business-critical**
47% | 42% | 11%

● Fully agree    ● Somewhat agree    ● Disagree

# An hour is too long to be disconnected

The importance of mobile connectivity shouldn't come as a surprise. It has a huge role in people's lives. In the UK, smartphones are practically ubiquitous among people of working age.

Not everyone gets a work mobile phone, but 57% of organisations allow (and a small number of them require) their employees to use their personal smartphones for work. Most productivity and collaboration tools are available as mobile apps.

And significantly, 62% of organisations use the general mobile network as the connectivity fall-back option when they experience failure in their office Wi-Fi network. Unfortunately, this happens more often than one might imagine.

All of which means that as mobile connectivity has become a critical part of our lives, this is quickly becoming equally true in offices as well.

## What do you do if you lose access to the Internet over the fixed broadband and Wi-Fi network?

All of our office operations fall back to a general cellular network
**35%**

Part of our office operations fall back to a general cellular network
**27%**

We have a dedicated managed mobile service specifically for indoors
**17%**

We have provision from an alternative fixed-line Internet provider
**13%**

No provision
**8%**

**62%**

Fall back on the mobile network

# Two-thirds of organisations experience daily mobile connectivity problems in the office

As the survey reveals, mobile connectivity, even in offices, is business-critical for many organisations, and will become so for the majority in the next couple of years. It is therefore crucial that its reliability is impeccable. However, 67% of organisations experience some sort of indoor mobile connectivity problems on a daily basis.

The mobility challenges mentioned in our survey are many and common. More than one in three organisations have a permanent dead zone with no mobile signal in their offices. At least one in five organisations suffers from one or more problems every day, ranging from dropped mobile calls and slow mobile Internet connections to an inability to send or receive texts and missed-call notifications when the phone hasn't rung.

If we add the proportion of organisations that report occasional mobility issues in the office to those that experience daily problems, the number goes up to a staggering 97%.

In many offices, moving around while talking on a mobile phone can result in a dropped call. In our survey, about half of respondents said this happens when people enter a lift or move to the basement of their office, and in 38% of organisations, people lose the mobile signal and drop that important call when they enter the building from outside.

Proportion of organisations experiencing daily problems with mobile/cellular connectivity in the office

## 67%

## What sort of mobile/cellular connectivity problems do you experience in the office every day?

No coverage or a permanent dead zone in parts of the office — **37%**

Missed call notification even though mobile phone has not rung — **26%**

Inability to send or receive text messages — **22%**

Slow or unavailable mobile data or mobile Internet — **21%**

No coverage or a permanent dead zone in the entire office — **21%**

Intermittent mobile signal or patchy indoor coverage — **21%**

Dropped mobile phone calls — **20%**

Resorting to Wi-Fi calling when mobile signal is lost — **20%**

# Downsides of poor mobile connectivity are considerable

Critically, 70% of senior executives report that loss of mobile connectivity in their offices means lost sales revenue or higher direct costs, beyond just the time wasted trying to restore a lost connection. An example of additional costs is a higher volume of calls to the IT helpdesk as employees report malfunctioning devices.

But the negative effects of an unreliable mobile connection in the office go way beyond those that are easily quantifiable. Almost three in four senior executives say that loss of mobile connectivity results in employee-related problems: wasted time, staff getting annoyed and complaining when they get interrupted from doing their job, or simply can't be reached by their families. These lead to lower morale and can affect an organisation profoundly.

In addition, more than half of senior executives surveyed believed their organisation suffers reputational damage and lower customer satisfaction when connectivity fails them.

## What are the effects of mobile connectivity problems in your office?

**72%**
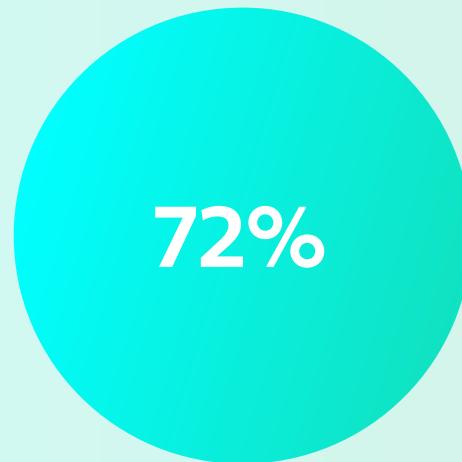
Negative effects related to employees: wasted productivity, lower morale, complaints

**70%**

Lost sales revenue or direct costs other than wasted time

**52%**

Lower client satisfaction or damage to reputation

# Companies are willing to invest to solve their connectivity problems

Faced with these regular connectivity challenges and the significant negative impact they cause, the vast majority of organisations have explored various solutions: Wi-Fi boosters, small cells and other technologies. However, as reported, the problems persist for many.

Therefore, it makes sense that in our survey 88% of companies that don't have a working solution for reliable mobile signal and capacity indoors say they are open to exploring further solutions and investing in them in the next two years. Specifically, 39% will invest in mobile connectivity in the next two years and another 49% are considering it.

This is particularly notable, as 92% of respondents understand that it's primarily the building's structure, design or location that are the main causes of their indoor mobile connectivity problems. It's clear that senior enterprise leaders understand the scale of their workplace connectivity challenges, and are driven to resolve them for their employees, partners and customers within the next two years.

# We make digital infrastructure simple.

So you can always connect your customer.

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*You're on*

**FreshWave**

You're on