



# **Sage SMB Survey on Mobile Devices: Construction Industry**

**March 2013**



# Summary Report

## Introduction

The following is an analysis of small and mid-sized businesses in the construction industry commissioned by Sage, a leading global supplier of business management software and services for small and mid-sized businesses. This is part of a larger survey of decision makers and employees of various industries about their use of mobile devices conducted between January 10 and February 1, 2013. Among the findings for this industry:

About nine out of ten decision makers indicate that some form of laptop, desktop, tablet, or smartphone is used for business remotely. While smartphones are most commonly used in the companies (83%), laptops are used for remote business use in seven out of ten cases. Desktops and tablets play a relatively minor role at this time for remote business usage. Almost three out of four companies surveyed (73%) supply mobile devices to their employees. Overall, almost nine out of ten (85%) decision makers believe mobile technology has a positive effect on their company's productivity. When decision makers were asked about how mobile technology has changed the company, respondents cite the ability to access company information from the job site, reducing extra traveling and gas. The ability to have instant reporting allows decisions to be made on site, reducing errors. The ability to get information remotely helps with the bidding process, by providing on-site access to materials pricing.

Less than one in ten businesses currently uses Windows® 8 for mobile devices. For smartphones and tablets about three out of ten businesses (30%) use the Android operating system, 46% use Apple iOS, and 39% use a version of Windows.

Construction businesses most commonly use mobile applications for the following functions: keeping business contacts organized (40%), scheduling (29%), keeping up on the status of projects (23%), and assigning tasks to specific employees (22%). The accounting function is typically carried out on a desktop computer using accounting software (82%).

Both decision makers and other employees in the construction industry were asked about their personal use of devices to access work-related information remotely. About three-quarters of the respondents used devices for mobile access to work information. Devices most commonly used were smartphones (used by 77% of those who use mobile devices), followed by laptops (72%). Desktops and tablets were less likely to be used remotely (40% and 26% respectively). Employees who use remote devices for work are generally ambivalent about Windows 8. About one in ten use it, mostly on laptops and desktop computers. About half of employees are undecided about the operating system.

Employees were asked what proportion of the activity on their mobile device is work versus personal. An average of 68% of all activity on an employee's laptop is work related, followed by 62% for smartphones and 44% on tablets. Employees most commonly used their mobile devices for email (92%), followed by managing contacts (76%), text messaging, banking (58%), scheduling (53%), and creating documents (53%). They are least likely to use mobile devices for online meetings (4%), field service (10%), operations (12%), sales (16%), or accounting/ERP (24%).

Two-thirds of the respondents came from construction companies with fewer than ten employees.

## What is your primary role at your business?

Answer	Response	%
Owner, President, CEO, Partner, or General Manager	109	50%
Controller, Treasurer or CFO, Accounting Administrator, or Supervisor	24	11%
Accountant/Bookkeeper	41	19%
Office Manager/Administrative Asst./Secretary	32	15%
Operations Manager	4	2%
Information Technology	1	0%
Sales/Marketing	4	2%
Professional	2	1%
Other	0	0%
Total	217	100%

## How many of your employees are using the following to access work-related information when they are not in the office?

Question	None	1 or 2	3 to 5	6 to 10	11 to 25	More than 25	Don't Know/Not Sure	Mean
Laptops	32.1%	56.7%	6.7%	3.7%	0.0%	0.7%	0.0%	1.9
Desktops	49.3%	37.3%	8.2%	3.0%	1.5%	0.0%	0.7%	1.7
Tablets	53.0%	35.8%	9.0%	1.5%	0.0%	0.0%	0.7%	1.6
Smartphones	17.2%	43.3%	26.1%	9.0%	3.0%	1.5%	0.0%	2.4

## How useful would it be to use mobile devices for the following tasks?

Question	Very Useful	Somewhat Useful	Neutral	Somewhat Not Useful	Not At all Useful	Mean
Viewing your calendar	8.3%	25.0%	16.7%	0.0%	50.0%	3.6
Keeping up with the status of projects and organizing project details	16.7%	25.0%	16.7%	0.0%	41.7%	3.3
Creating customer invoices	16.7%	0.0%	33.3%	0.0%	50.0%	3.7
Keeping your task list and/or assigning tasks to team members	25.0%	8.3%	16.7%	0.0%	50.0%	3.4
Viewing accounting and business reports	8.3%	25.0%	16.7%	0.0%	50.0%	3.6
Tracking time spent on your work	16.7%	16.7%	33.3%	0.0%	33.3%	3.2
Accepting payments	8.3%	8.3%	16.7%	8.3%	58.3%	4.0
Accessing customer information	16.7%	16.7%	25.0%	0.0%	41.7%	3.3
Processing customer payments by credit card	0.0%	8.3%	16.7%	0.0%	75.0%	4.4

**Are the mobile devices used by your employees supplied by your company? (Check all that apply.)**

Answer	Response	%
Supplied by company	89	73%
Supplied by employee (no company reimbursement)	28	23%
Device supplied by employee but service paid for by company	8	7%
Don't know/not sure	5	4%

**How much do you believe the use of the following devices for remote access has changed over the past year?**

Question	Decreased	Remained the same	Increased	Mean
Laptops	13.1%	43.4%	43.4%	2.3
Desktops	33.6%	45.1%	21.3%	1.9
Tablets	3.3%	18.0%	78.7%	2.8
Smartphones	1.6%	9.8%	88.5%	2.9

## What is your company's approach to Windows 8?

Question	Use today	Plan to use within the next six months	Considering	Rejected	Undecided	Mean
Smartphones	2.5%	3.3%	16.4%	27.9%	50.0%	4.2
Tablets	3.3%	0.8%	16.4%	27.9%	51.6%	4.2
Laptops	9.0%	4.9%	17.2%	18.9%	50.0%	4.0
Computers	9.8%	7.4%	15.6%	18.0%	49.2%	3.9

## What is your company's approach to supporting the following operating systems for smartphones and tablets?

Question	Use today	Plan to use within the next six months	Considering	Rejected	Undecided	Mean
Android	30.3%	2.5%	15.6%	23.8%	27.9%	3.2
Apple iOS	45.9%	2.5%	9.8%	21.3%	20.5%	2.7
Windows	39.3%	4.9%	17.2%	12.3%	26.2%	2.8



## What effect has mobile technology had on your company's productivity?

Answer	Response	%
Positive	104	85%
Negative	2	2%
No effect	16	13%
Total	122	100%

**Please indicate how your business currently carries out each of the business functions below: (Check all that apply.)**

Question	Paper	Desktop spreadsheet software	Desktop software (not spreadsheet)	Mobile application	Web-based application	Outside service	Other	Don't do this
Scheduling	32.8%	24.6%	23.0%	28.7%	9.8%	0.0%	4.1%	8.2%
Keeping up with the status of projects and organizing project details	23.0%	34.4%	27.0%	23.0%	7.4%	0.0%	4.1%	9.0%
Creating customer invoices	10.7%	26.2%	67.2%	8.2%	2.5%	0.0%	0.0%	4.1%
Keeping a or task list and/or assigning tasks to specific employees	27.0%	16.4%	21.3%	22.1%	7.4%	0.0%	4.1%	19.7%
Managing the business' accounting	4.9%	18.0%	82.0%	3.3%	0.8%	1.6%	0.0%	1.6%
Tracking time spent on specific projects	24.6%	18.9%	39.3%	13.1%	3.3%	0.8%	4.1%	19.7%
Keeping all your contacts organized	11.5%	12.3%	59.8%	40.2%	9.0%	0.0%	4.1%	1.6%

**Do you personally use a device (such as a desktop, laptop, tablet computer or smartphone) to access work-related information remotely (when away from the office or your main computer)?**

Answer	Response	%
Yes	156	76%
No	49	24%
Total	205	100%

**What types of devices do you use to access work-related information remotely? (Check as many as apply.)**

Answer	Response	%
Desktop	41	26%
Laptop	113	72%
Smartphone	120	77%
Tablet	62	40%
Other (specify)	3	2%

## What is your personal approach to Windows 8?

Question	Use today	Plan to use within the next six months	Considering	Rejected	Undecided	Mean
Smartphones	5.8%	3.2%	14.7%	26.9%	49.4%	4.1
Tablets	5.8%	1.9%	17.3%	26.9%	48.1%	4.1
Laptops	12.8%	5.1%	19.9%	16.0%	46.2%	3.8
Computers	11.5%	7.1%	19.2%	16.0%	46.2%	3.8

## What is your company's approach to Bring Your Own Devices (BYOD) to work?

Answer	Response	%
We already have this company policy, which lets employees bring and use their devices	51	33%
We are considering this policy to let employees bring and use their devices	12	8%
We have not considered this policy	71	46%
We have considered this policy and decided to <b>not</b> permit employees to bring and use them	16	10%
Other	6	4%
Total	156	100%

**For the desktop device that you use, what percentage do you use for work versus personal? (Move the slider to indicate percent.)**

Answer	Min. Value	Max. Value	Average Value	Standard Deviation	Responses
Desktop	1.00	100.00	71.54	29.57	41

**For the laptop that you use, what percentage do you use for work versus personal? (Move the slider to indicate percent.)**

Answer	Min. Value	Max. Value	Average Value	Standard Deviation	Responses
Laptop	2.00	100.00	67.95	29.37	110

**For the smartphone that you use, what percentage do you use for work versus personal? (Move the slider to indicate percent.)**

Answer	Min. Value	Max. Value	Average Value	Standard Deviation	Responses
Smartphone	4.00	99.00	61.93	25.25	120

**For the tablet that you use, what percentage do you use for work versus personal? (Move the slider to indicate percent.)**

Answer	Min. Value	Max. Value	Average Value	Standard Deviation	Responses
Tablet	3.00	100.00	43.84	28.93	62

## What type of work-related information or applications do you personally access remotely on a mobile device? (Select all that apply.)

Answer	Response	%
Accounting/ERP	37	24%
Banking	91	58%
Contacts	119	76%
Schedule	82	53%
Documents (Word, Excel)	82	53%
Email	143	92%
Field Service	16	10%
File Storage	31	20%
Online Meetings	6	4%
Operations	18	12%
Sales	25	16%
Marketing	18	12%
Social Media	43	28%
Text Messaging	105	67%
Time Management	35	22%
Other (specify)	3	2%

## How many employees work in your establishment?

Answer	Response	%
None	5	2%
1-4	82	38%
5-9	58	27%
10-19	35	16%
20-49	30	14%
50-99	5	2%
100-249	2	1%
250-499	0	0%
500-999	0	0%
1,000 or more	0	0%
Don't know/not sure	0	0%
Total	217	100%

## About the Survey

The Sage SMB Survey on Mobile Devices: Construction Industry was conducted among 249 respondents and has an error rate of +/- 6.2 percent with a 95 percent confidence level. This is part of a larger survey of decision makers and employees of various industries about their use of mobile devices conducted between January 10 and February 1, 2013.

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