



MEF

MOBILE ECOSYSTEM FORUM

MOBILE COMMUNICATION FOR EMPLOYEES

CONVERGING PRIVATE AND
PROFESSIONAL LIVES

2021

FOREWORD

It is the second time we survey employees on how they use their smartphones for work. We did it just before the pandemic at the end of 2019; we repeat that now in a world more accustomed to the “new normal”. The results are staggering: mobile was already the instrument of choice for many, but it is now the accepted reality. **Your office is ‘mobile first’.**

A shadow IT system has now been created: it traverses public messaging apps such as WhatsApp or WeChat, social networks and document sharing sites. Messaging beats email in most countries at work too: it is spontaneous and effective. However, these shadow IT solutions poses a major threat for a company security, intellectual property, compliance and personal data management. In a world of hacking and ransom attacks this weakness is truly worrying.

There is good news in the survey: companies are taking actions and taking more control. It is possible to create safe mobile environments and apps for the employees. Unfortunately, you can also see a certain level of complacency emerging. The new normal is now accepted, the industry should educate all. **The potential threats are too big to go unnoticed: embrace mobile, but do it safely.**

At MEF, we inform, we connect and we support cross-industry initiatives – but for everything we do our members are at the centre. If this report sparkles comments, ideas or new information do let us know info@mobileecosystemforum.com. If you are not a member [Join In](#)



DARIO BETTI
CEO

ABOUT MEF

Mobile Ecosystem Forum is a not-for-profit global trade body that acts as an impartial and authoritative champion for addressing issues affecting the broadening mobile ecosystem. We provide our members with a global and cross-sector platform for networking, collaboration and advancing industry solutions. The goal is to accelerate the growth of a sustainable mobile ecosystem that delivers trusted services worldwide. Established in 2000 and headquartered in the UK, MEF's members are active across Africa, Asia, Europe, Middle East, North and Latin America.

MEF provides a community that offers **Insight** (reports, surveys, market guidance); **Interaction** (events, networking, visibility) and **Impact** (advocacy, code of conducts, industry initiatives).

To join the MEF communities please email info@mobileecosystemforum.com.

Contact [Sam](#) if you'd like to contribute an article.

If you would like to explore the range of MEF Member sponsorship opportunities available at any MEF Connects then please contact [Susan](#).

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ADVISOR IoT

DANIEL MENSİ
ADVISOR BLOCKCHAIN

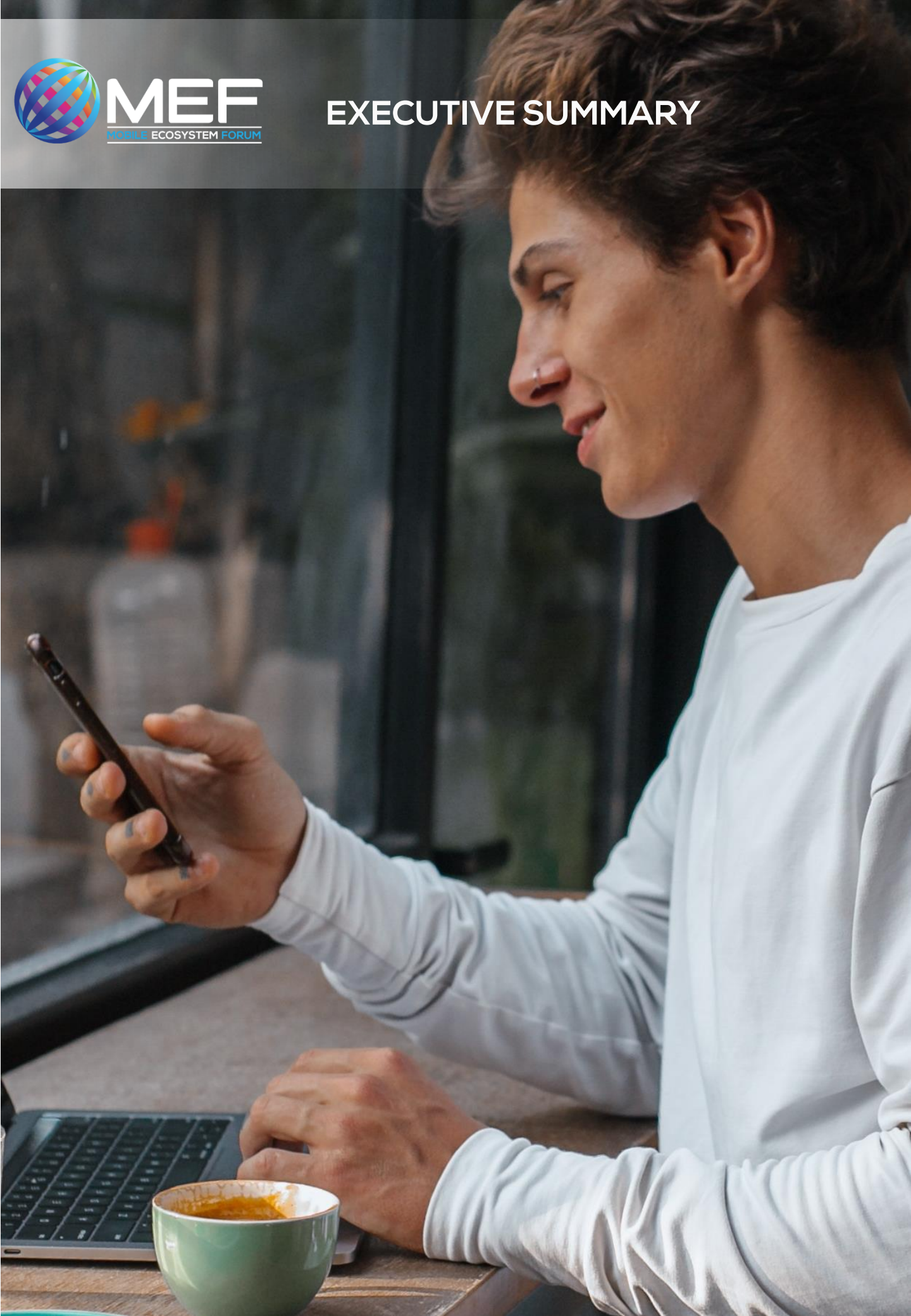
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DESIGNER

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THE MOBILE
ECOSYSTEM FORUM
OFFERS MARKET
DATA TO ITS
MEMBERS AND TO
THE INDUSTRY TO
PROMOTE
CONSUMER
UNDERSTANDING
AND ADVANCING OF
LONG TERM
SUSTAINABLE
PRACTICES AND
BUSINESS MODELS





KEY FINDINGS

● THE TREND TOWARDS MOBILE WORKING HAS ACCELERATED

Our previous 2019 study revealed the extent to which new workplace mobility norms were already presenting issues for data security, privacy and compliance. There is no doubt that since then, **the Covid-19 pandemic has created additional disruption and accelerated the transition towards more mobile working** as many employees have been forced to work from home. In this study we see an increase in the global proportion using a smartphone for work, as well as an increase in mobile information sharing driven especially by developing markets.

● THE WORKING WORLD REMAINS IN FLUX

To date, the impact of the pandemic has been uneven in terms of evolved working practices and unemployment, while the long-term impact cannot yet be fully understood. As a result there may be a tension between the need to adapt data security practices to new working realities, and the current uncertainty faced by many employers. What seems certain is that **greater integration of office and home life is likely to continue.**

● FEWER BARRIERS BETWEEN PRIVATE AND PROFESSIONAL MOBILE ACTIVITY

The distinction between personal and professional communication is increasingly blurred. **"Bring your own device" remains the prevalent model when it comes to using a smartphone for work**, and the surge in popularity of public messaging apps such as WhatsApp makes the smartphone an ever more central work tool.

● EMPLOYERS HAVE BEEN FORCED TO ADAPT

Most employees in China and India say that their employers have moved quickly to support data communications from home, with the most common focus WiFi routers, Virtual Private Networks and new mobile apps. Such actions have been less common in European markets and the USA. In these markets fixed infrastructure is more abundant, but the resilience and mobility of emerging markets is to be commended.

● IMPROVEMENT IN SECURITY PERCEPTIONS

Slightly more employees than in the past believe that the data they share with colleagues via **mobile is secure**. The improvement is most marked in India and Brazil, where there is a high proportion who use a mobile for work and where employers have made significant new efforts to support communications from home.

● EMPLOYERS COULD DO MORE

The continued use by employers of reactive measures, such as removing an ex-colleague from a chat group, suggests that data security practices are not watertight. Dedicated company messaging apps, which may address some data security concerns, are not yet established.

LESSONS FOR THE INDUSTRY

ASSUME CHANGES IN WORKING PRACTICES WILL BE PERMANENT

Covid-19 has accelerated a trend towards mobile working, not created it. We must assume that working practices will be permanently and significantly altered even when the world returns to 'normal' – employers must plan for a reality in which data security is seamlessly managed across fixed locations and remote environments.

EDUCATE EMPLOYEES ON THE NEW RISKS POSED BY THESE PRACTICES

Employees are more in control of data security than in the past, but not necessarily in the know when it comes to specific risks that organisations face due to remote working. Ongoing education is needed in order to promote willing compliance.

DIFFERENTIATE PERSONAL AND PROFESSIONAL COMMUNICATION

The merging of personal and professional communication channels, and the popularity of public messaging apps, creates a risky situation in which company data is vulnerable. A clear delineation between personal and professional communication must be established via education and dedicated, secure company channels, ideally harnessing the ease and convenience of mobile messaging apps.

SECURE DATA COMMUNICATIONS MORE COMPREHENSIVELY

Many employers still behave reactively when it comes to securing data, an increasingly untenable position in the mobile working era. Employers should consider more comprehensive upstream actions.



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WORK PRACTICES

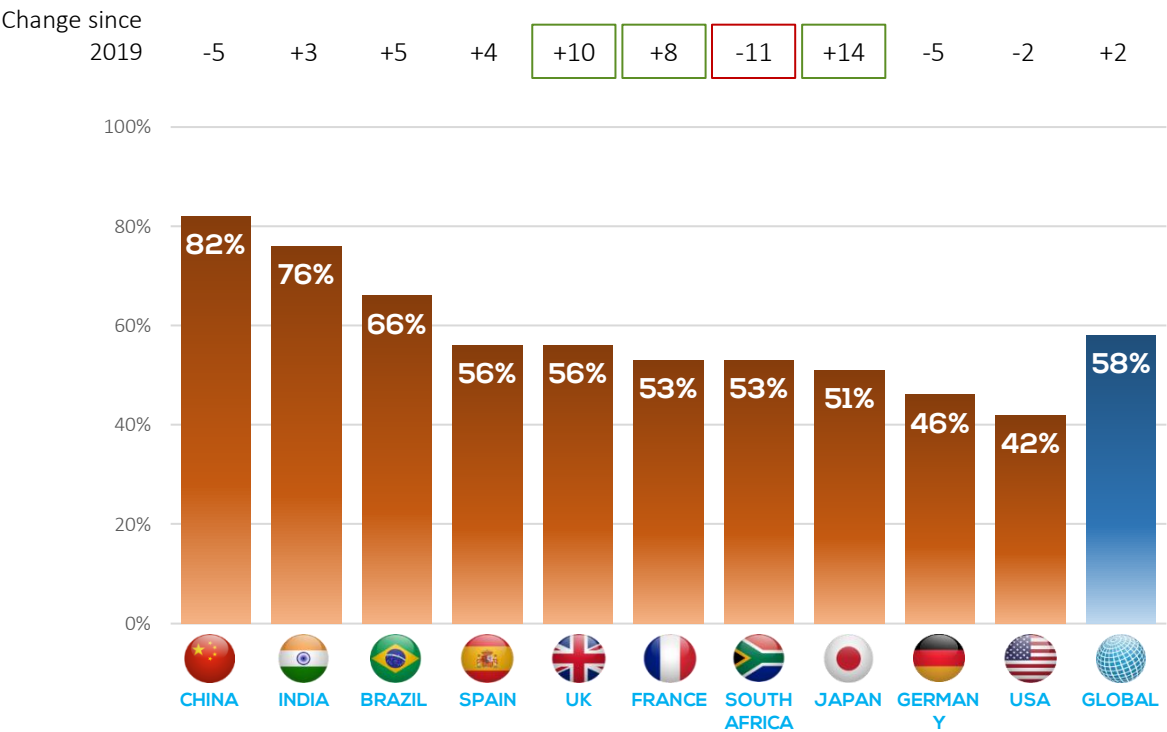


MORE EMPLOYEES ARE USING A MOBILE FOR WORK

Over half of smartphone users use their mobile for work, up 2 points from 2019.

This moderate global increase masks significant variation at a market level, some of which may be attributable to the uneven impact of COVID-19 on working practices and unemployment. Several markets have observed increases, in particular Japan (from a previously low base), the UK and France, while South Africa stands out for its notable decrease.

DO YOU USE A MOBILE DEVICE FOR WORK?

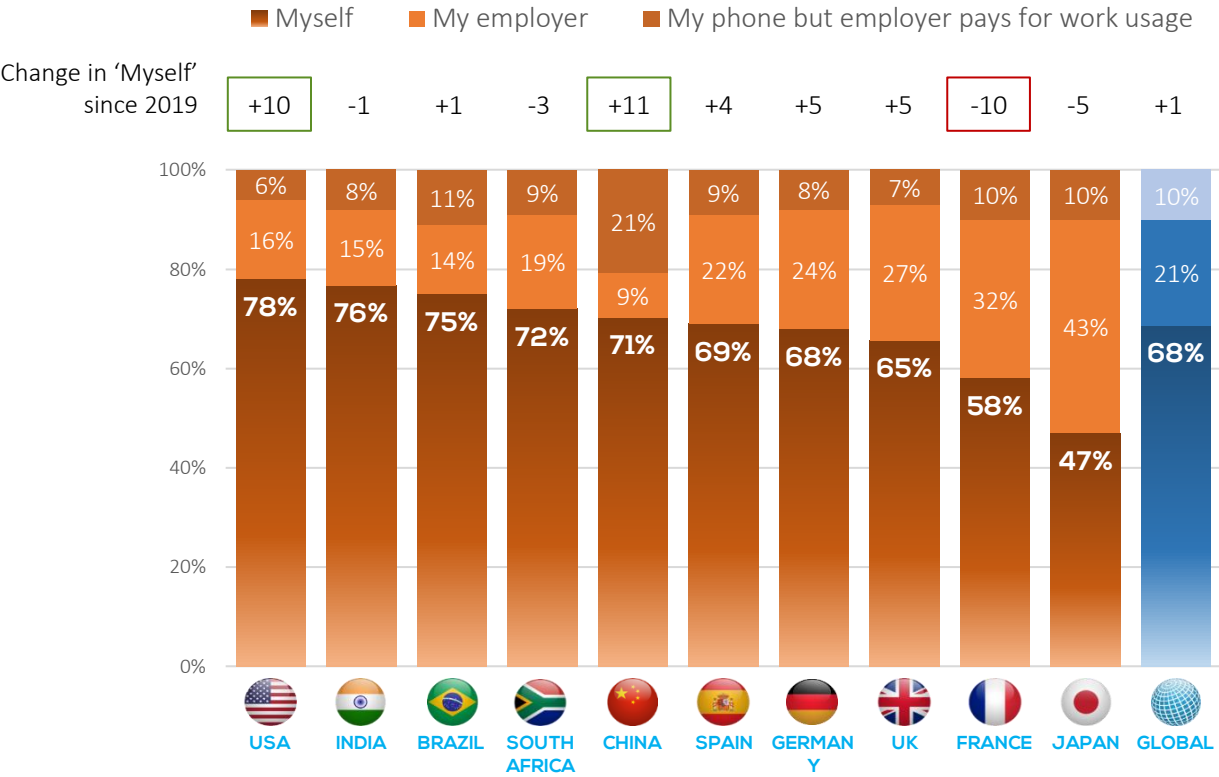


Base: n=650 per market, total 6,500

MOST PAY FOR THEIR OWN MOBILE DEVICE, A TREND WHICH HAS STRENGTHENED IN US AND CHINA

Bring-Your-Own-Device (BYOD) continues to be the dominant model. Since 2019, the US and China have observed large increases in the proportion of workers who pay for their own mobile device.

WHO PAYS FOR THE MOBILE YOU USE FOR WORK?



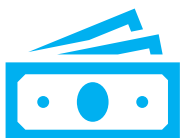
Base: those who use a mobile for work, ranging from n=275 to n=534 per market. Global total n=3781



THOSE USING A MOBILE FOR WORK OVER-INDEX IN SEVERAL CHARACTERISTICS



More likely than other smartphone users to be **male** (52% vs. 47%) and **aged between 25-34** (39% vs. 32%)



More likely to **earn a high income** (36% vs. 25%)



More likely to **own another smart device** (94% vs. 84%)



Likely to **engage with more types of smartphone activities, in particular payments** (41% sent money to a friend via mobile, vs. 26%)



More likely to have experienced data harm (86% vs. 72%)



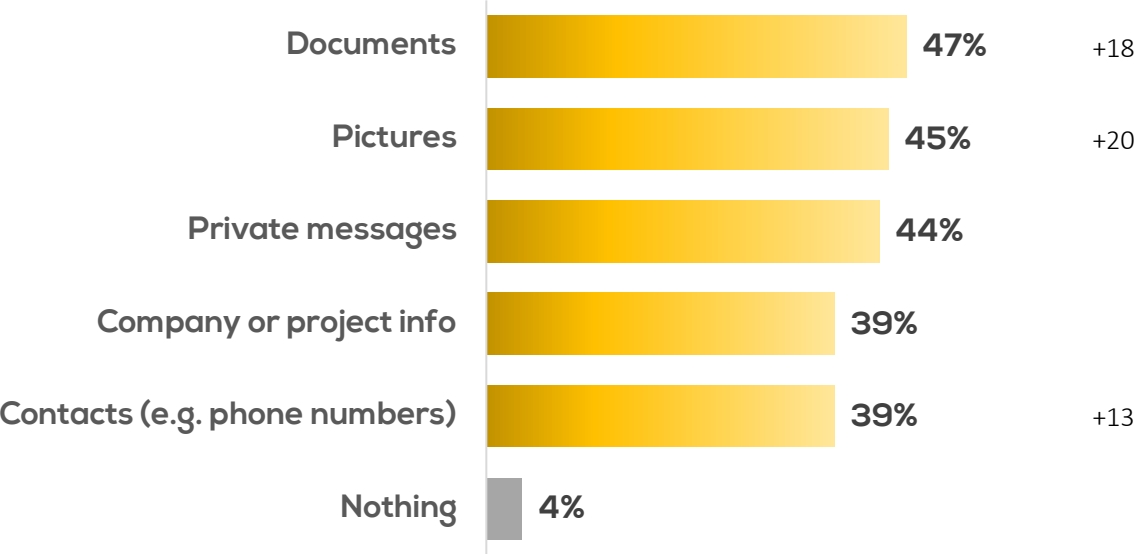
More likely to have taken preventative action (91% vs. 75%)

LARGE INCREASE IN INFORMATION SHARING WITH COLLEAGUES VIA MOBILE

Those using a mobile for work are sharing more forms of information than in the past. Since 2019 there has been a significant increase in the sharing of documents, pictures and contact information.

WHAT DO YOU SHARE WITH COLLEAGUES VIA MOBILE?

Change since 2019*

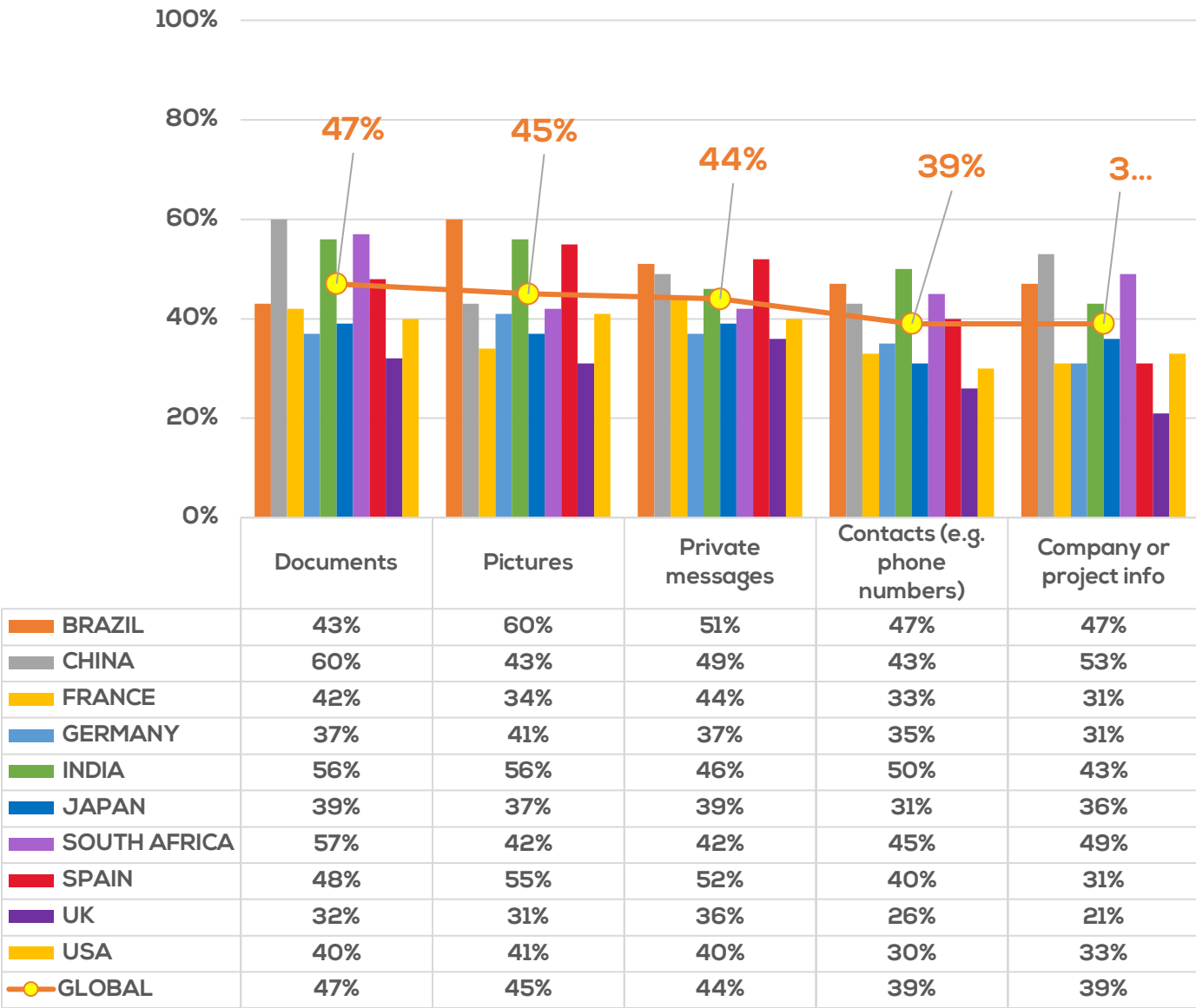


Base: those who use a mobile for work, n=3781
*Not all options were available for selection in 2019 study

SMARTPHONE INFORMATION SHARING IS DRIVEN IN PARTICULAR BY DEVELOPING MARKETS AND SPAIN

There is some variation between markets in terms of the information that is shared. Workers in China, Brazil, India, South Africa over-index in multiple areas as does Spain, while UK mobile workers are the least likely to share all information types.

WHAT DO YOU SHARE WITH COLLEAGUES VIA MOBILE?



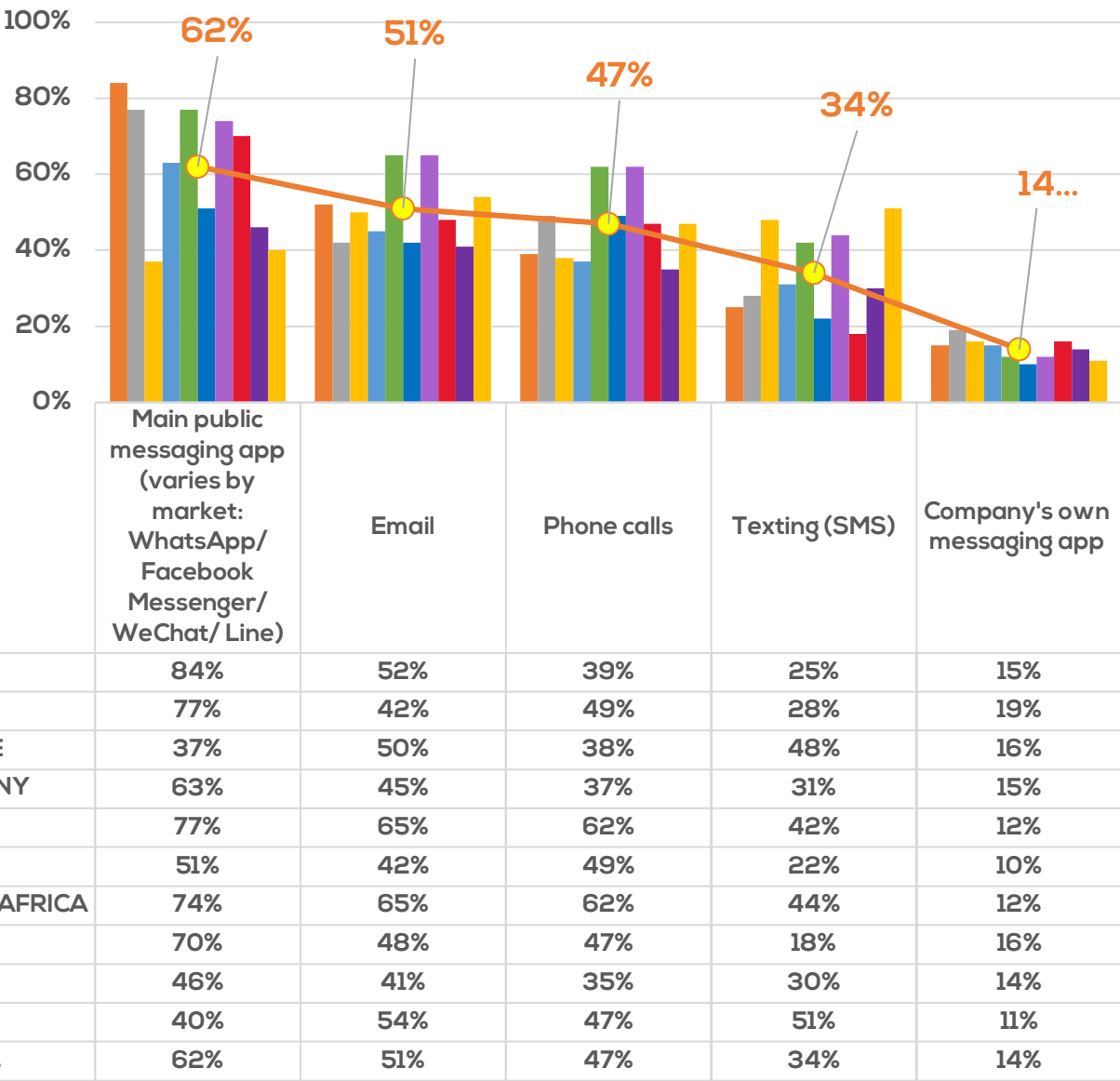
Base: those who use a mobile for work, ranging from n=275 to n=534 per market. Global total n=3781



IN MOST MARKETS, PUBLIC MESSAGING APPS ARE NOW A MORE NATURAL OPTION THAN EMAIL

Public messaging apps such as WhatsApp have overtaken traditional forms of mobile work communication such as email in most markets (all except US and France). Companies’ own messaging apps are not yet established in a mobile context. For full detail on each market, including additional forms of communication, see pages 16-20.

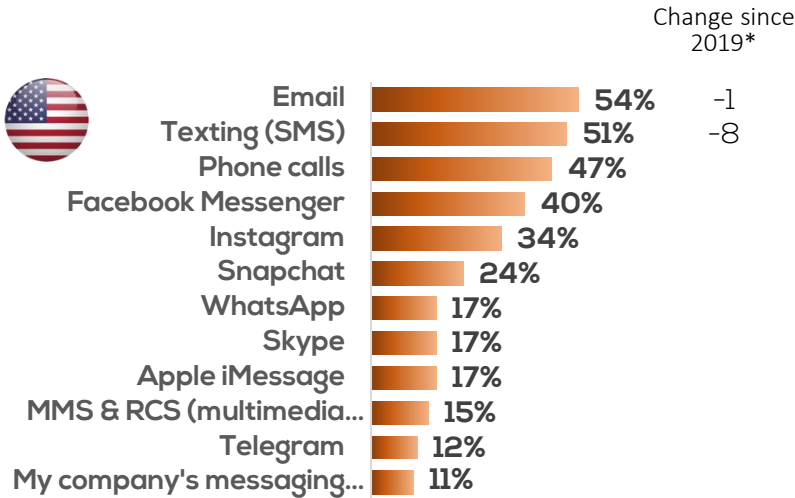
IN WHICH WAYS DO YOU COMMUNICATE WITH COLLEAGUES, CUSTOMERS, OR SUPPLIERS USING YOUR MOBILE DEVICE?



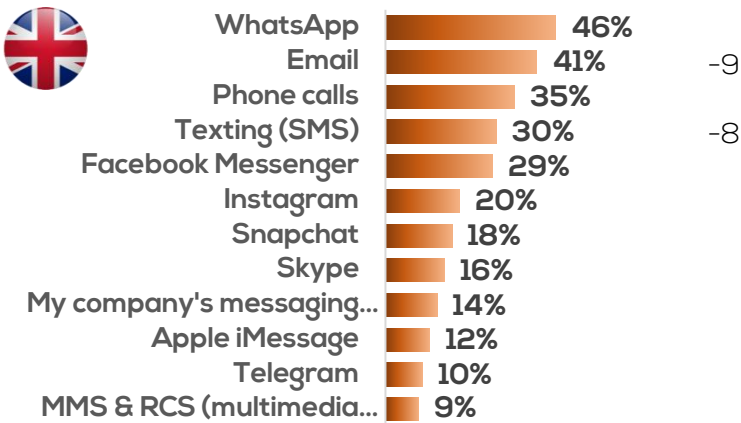
Base: those who use a mobile for work, ranging from n=275 to n=534 per market. Global total n=3781

MOBILE WORK COMMUNICATION TOOLS: US AND UK

IN WHICH WAYS DO YOU COMMUNICATE WITH COLLEAGUES, CUSTOMERS, OR SUPPLIERS USING YOUR MOBILE DEVICE?



In the US, email and SMS texting remain favourites, though the latter has declined in prevalence. Facebook Messenger is now used by 2 in 5 US workers.

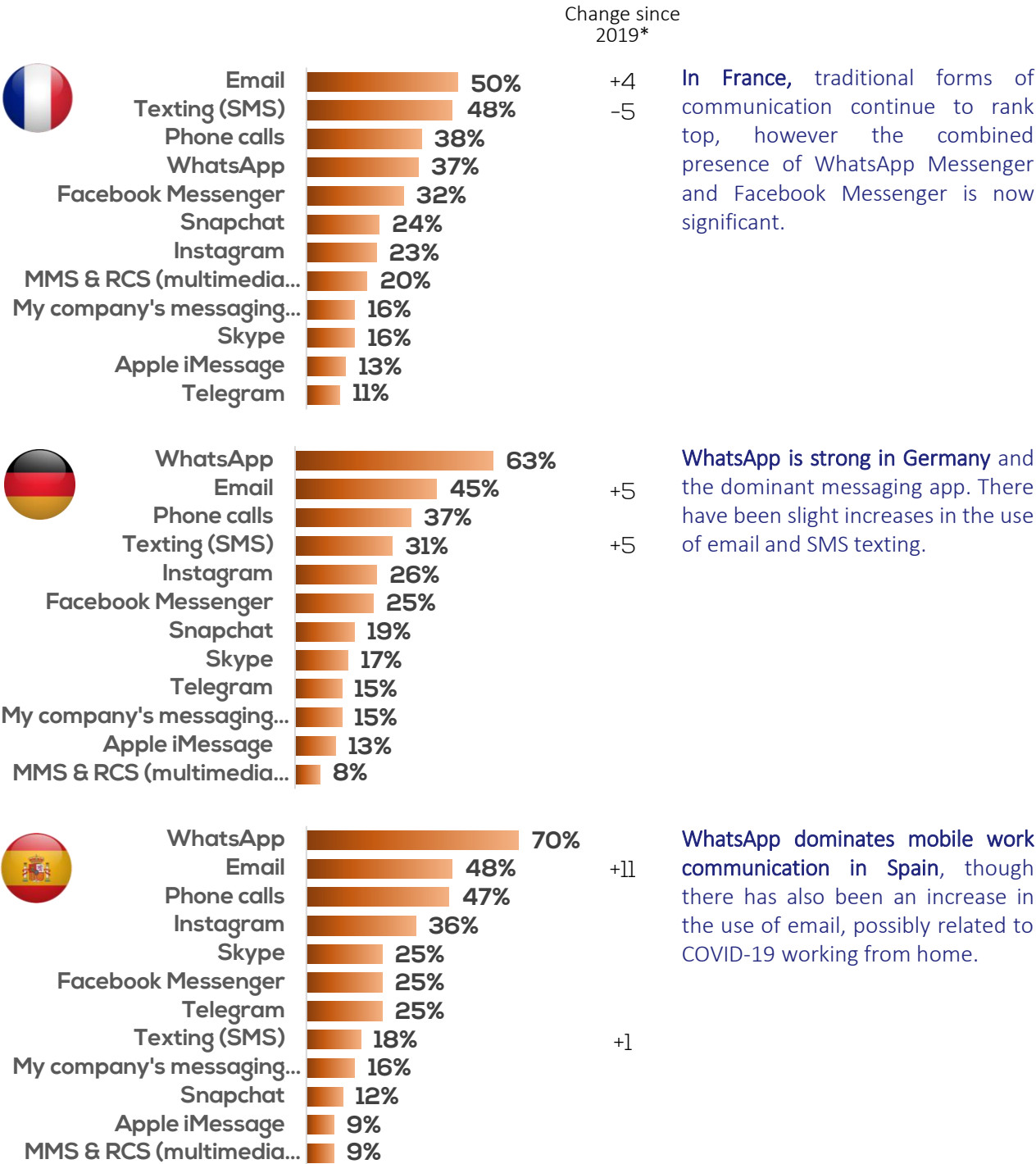


In the UK we observe a decline in email and SMS texts, likely in favour of public messaging apps such as WhatsApp.

Base: those who use a mobile for work, ranging from n=275 to n=534 per market
*Comparison with 2019 only available for email and text (SMS) due to question changes

MOBILE WORK COMMUNICATION TOOLS:
FRANCE, GERMANY, SPAIN

IN WHICH WAYS DO YOU COMMUNICATE WITH
COLLEAGUES, CUSTOMERS, OR SUPPLIERS USING
YOUR MOBILE DEVICE?

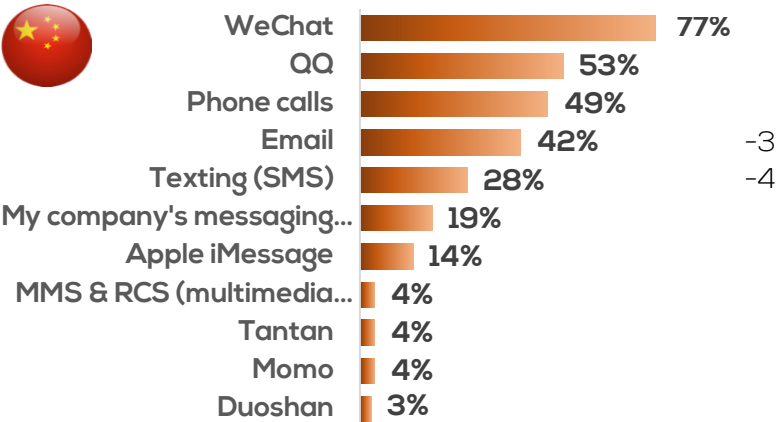


Base: those who use a mobile for work, ranging from n=275 to n=534 per market
*Comparison with 2019 only available for email and text (SMS) due to question changes

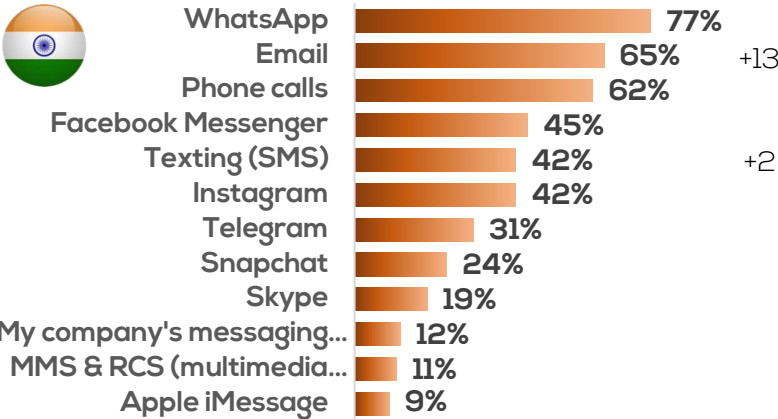
MOBILE WORK COMMUNICATION TOOLS:
CHINA, INDIA, JAPAN

IN WHICH WAYS DO YOU COMMUNICATE WITH
COLLEAGUES, CUSTOMERS, OR SUPPLIERS USING
YOUR MOBILE DEVICE?

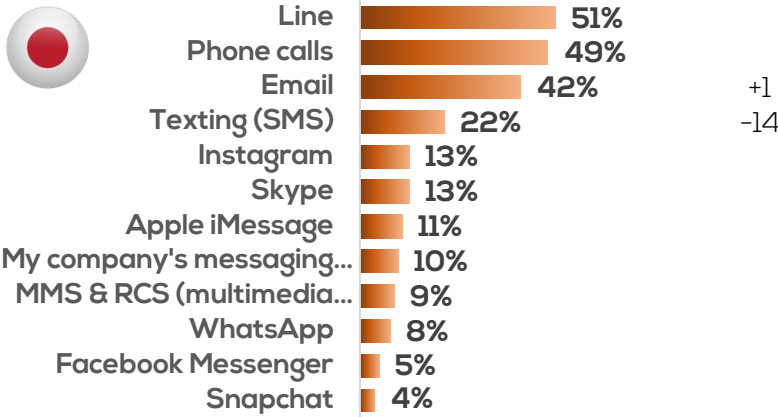
Change since
2019*



In China, messaging apps WeChat and QQ rank as the most popular forms of mobile work communication.



WhatsApp is strong in India, which has also observed an increase in the proportion of mobile workers relying on email to communicate.

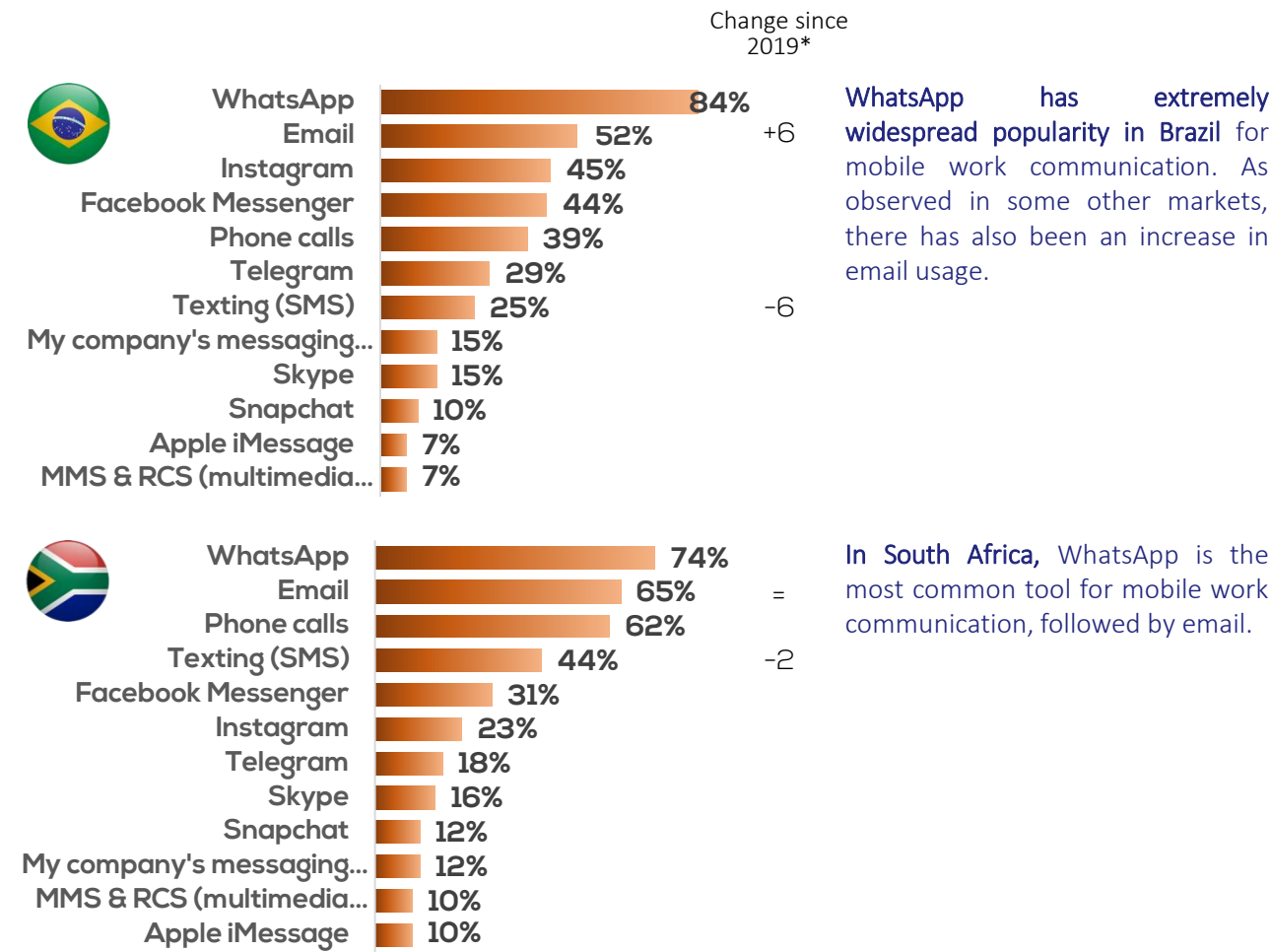


Line is commonly used in Japan alongside traditional forms of communication such as phone calls and email. A decline is observed for SMS texting.

Base: those who use a mobile for work, ranging from n=275 to n=534 per market
*Comparison with 2019 only available for email and text (SMS) due to question changes

MOBILE WORK COMMUNICATION TOOLS: BRAZIL AND SOUTH AFRICA

IN WHICH WAYS DO YOU COMMUNICATE WITH COLLEAGUES, CUSTOMERS, OR SUPPLIERS USING YOUR MOBILE DEVICE?

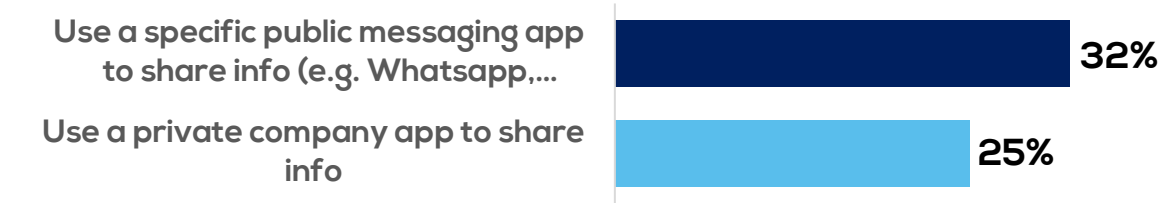


Base: those who use a mobile for work, ranging from n=275 to n=534 per market
*Comparison with 2019 only available for email and text (SMS) due to question changes

EMPLOYERS ENCOURAGING PUBLIC MESSAGING APPS MORE THAN PRIVATE COMPANY APPS

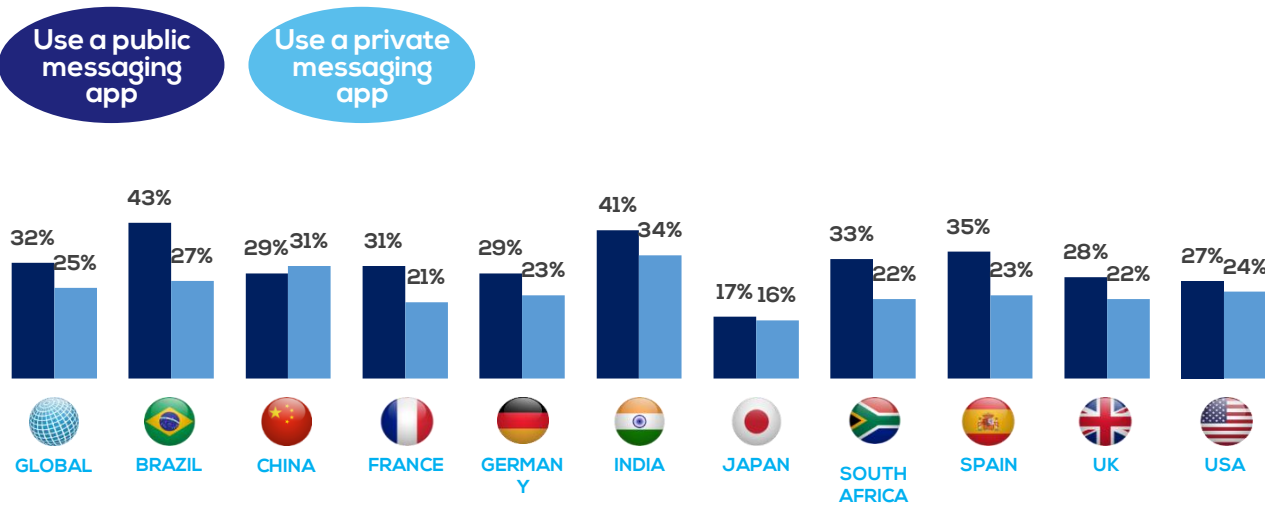
Employers are more likely to encourage the use of public messaging apps than they are to promote private company apps. The preference is consistent in all markets, but the delta is most marked in Brazil, South Africa and Spain, where WhatsApp is dominant (see pages 17 and 19).

HAS AN EMPLOYER EVER REQUESTED THAT YOU DO ANY OF THE FOLLOWING?



Base: those who use a mobile for work, n=3781

HAS AN EMPLOYER EVER REQUESTED THAT YOU DO ANY OF THE FOLLOWING? MARKET VIEW



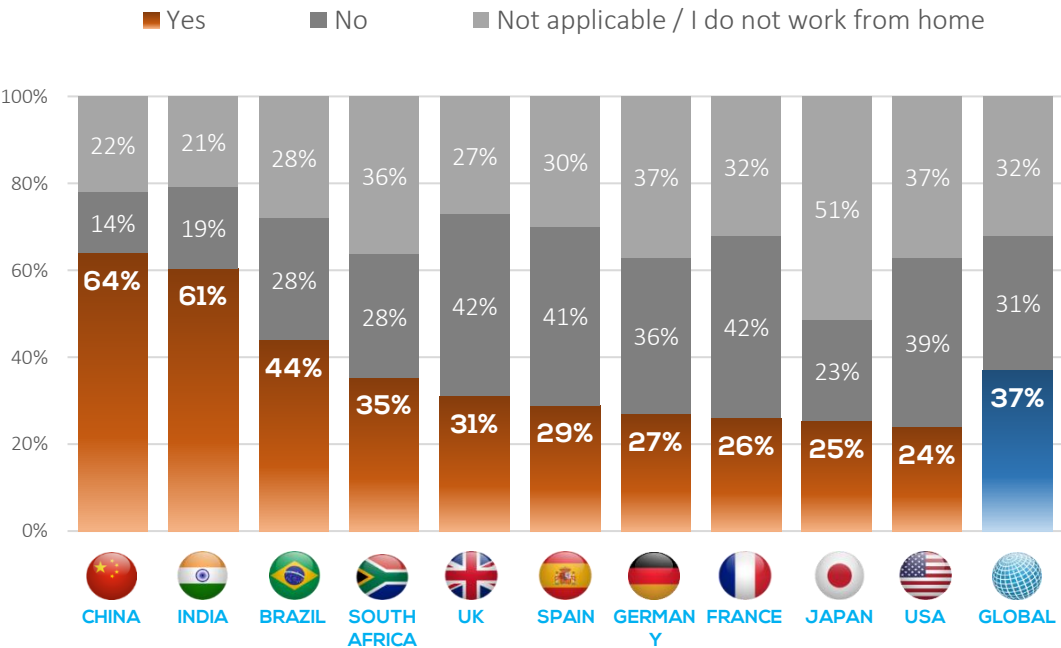
Base: those who use a mobile for work, ranging from n=275 to n=534 per market. Global total n=3781



COMPANIES IN CHINA AND INDIA ARE MOST LIKELY TO HAVE ASKED EMPLOYEES TO SECURE DATA

Some markets have moved quickly to support and secure data communications in employees’ homes, in light of more employees working from home due to Covid. Over 3 in 5 employees in China and India state that they have been asked to make changes, the most common requests relating to WiFi routers and Virtual Private Networks (VPN).

DURING COVID, HAS YOUR COMPANY ASKED YOU TO SECURE WORKING FROM HOME COMMUNICATIONS?



Base: n=650 per market, total 6,500

TOP EMPLOYER REQUESTS



Other requests: Mobile device management software (20%), New broadband connection (19%), Business mobile phone (18%), identity token / digital signature (18%)

Base: those whose employers asked them to secure working from home communications (2378)

REACTIVE MEASURES CONTINUE TO BE USED TO ADDRESS MOBILE DATA SECURITY

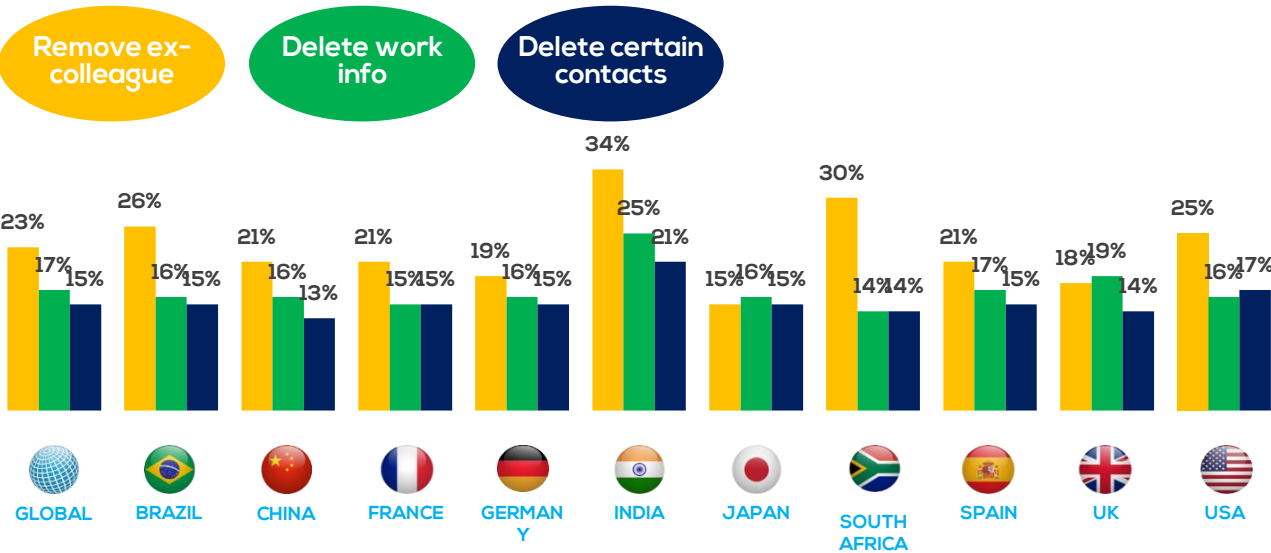
The use of reactive measures to address data security issues is not uncommon. Overall, more than 2 in 5 say their employer has asked them to take an action such as removing an ex-colleague from a chat group or deleting work-related information. The prevalence of these actions is highest in India.

HAS AN EMPLOYER EVER REQUESTED THAT YOU DO ANY OF THE FOLLOWING?



Base: those who use a mobile for work, n=3781

HAS AN EMPLOYER EVER REQUESTED THAT YOU DO ANY OF THE FOLLOWING? MARKET VIEW

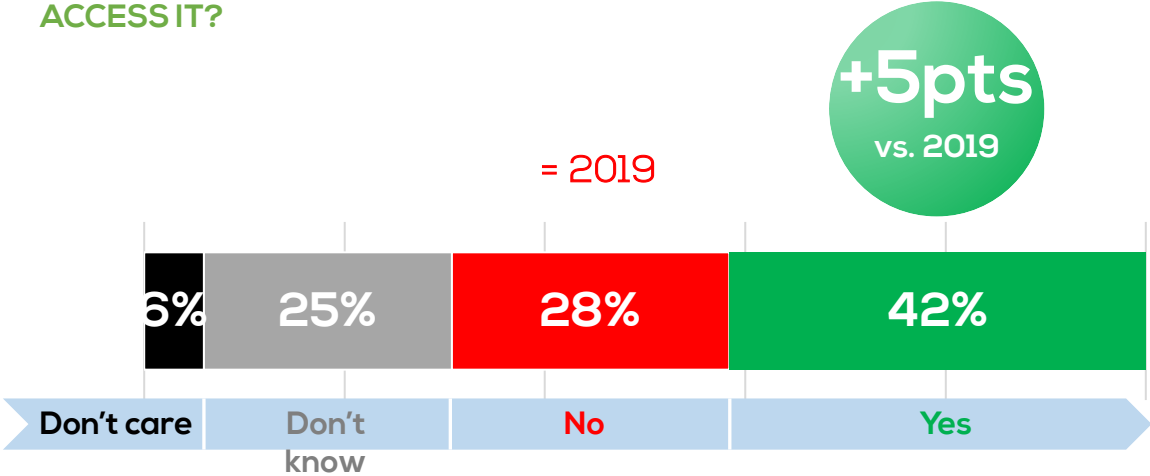


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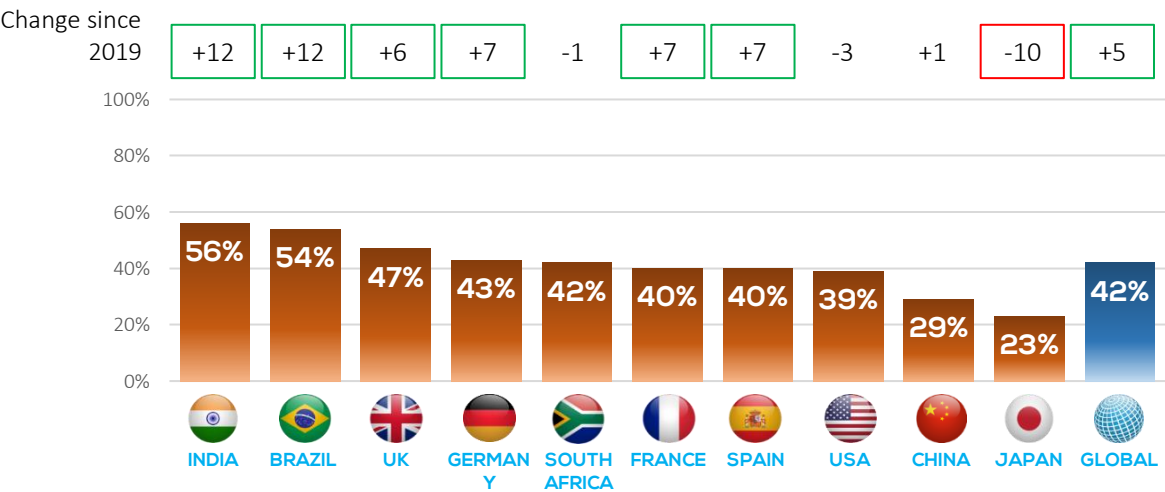
MORE NETWORKS THAN IN THE PAST FEEL THAT THE DATA THEY SHARE VIA MOBILE IS SECURE

Since 2019, 6 out of 10 markets have observed an increase in the perception that work-related information shared via mobile is secure. The improvement is greatest in India and Brazil, but also felt in all four European markets. Japan is an exception – security perceptions were previously below the global average and have worsened.

DO YOU CONSIDER THAT THE DATA SHARED BY YOU AND YOUR COLLEAGUES VIA MOBILE IS SHARED SECURELY? COULD OTHER PEOPLE ACCESS IT?



PROPORTION WHO CONSIDER DATA IS SHARED SECURELY MARKET VIEW



Base: those who use a mobile for work, ranging from n=275 to n=534 per market. Global total n=3781

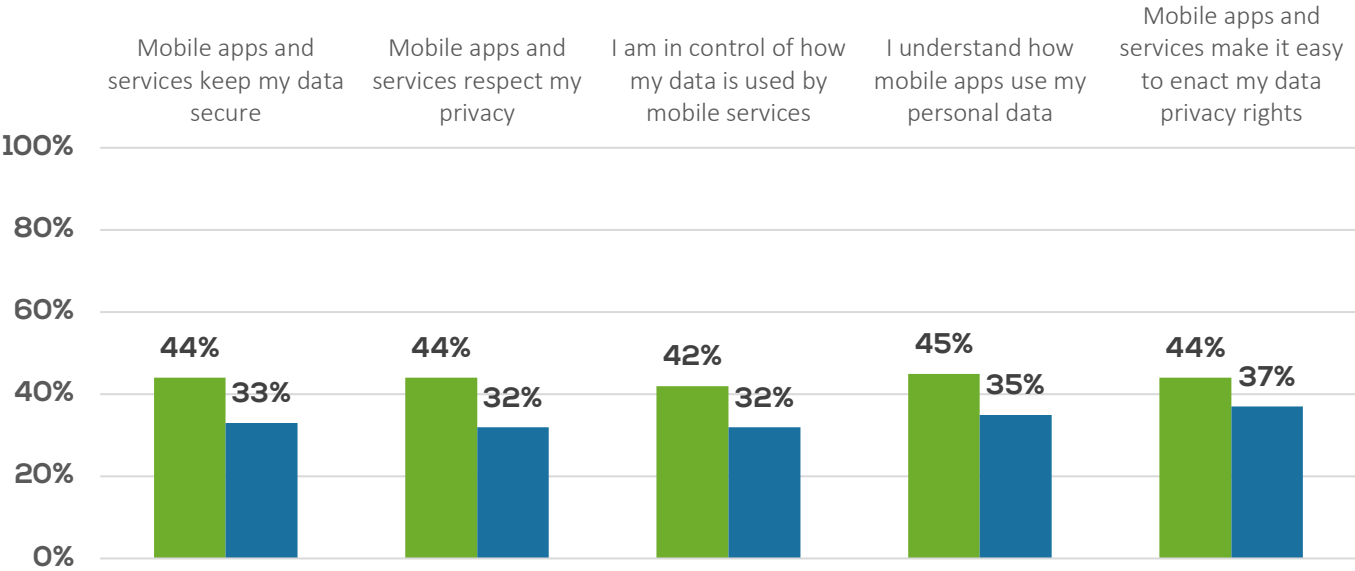
THOSE USING A MOBILE FOR WORK ARE THE MOST CONFIDENT REGARDING DATA PRIVACY & SECURITY

Those using a smartphone for work give consistently higher ratings for all security and privacy perceptions, which may be the result of actions they or their employer take, or of their own personal confidence and engagement in mobile activity. However, it remains the case that there is room for perceptions to improve further.

SLIGHTLY OR STRONGLY AGREE THAT NEEDS ARE MET

USE A MOBILE FOR WORK
(n=3781)

DO NOT USE A
MOBILE FOR WORK
(n=2719)



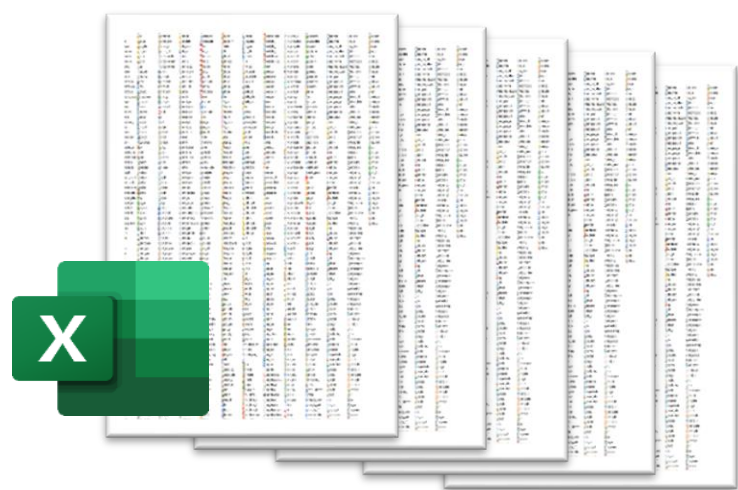
METHODOLOGY

MEF’s 7th Annual Smartphone Study was carried out in January 2021. On behalf of MEF, On Device Research surveyed 6,500 smartphone users, 650 in each of 10 markets. Where appropriate year-on-year comparisons are made.



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Full survey data sets are available for downloading



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