The **real value** of technology connectivity

TeamViewer

Contents

TeamViewer's new research finds that **the benefits of technology connectivity go much further than we might think**

Stay Connected

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A new level of remote understanding

We are in an era where complexity is inescapable, and change is continual. But while companies strive for simplicity and speed, friction and fragmented systems can slow down progress and blunt their competitive edge.

Businesses with diverse and dispersed workforces need consistency. That will not be easy. Technology touchpoints are multiplying: the number of internet of things devices worldwide is forecast to reach more than 29 billion in 2030. There are already more cellphones than people. And some industry sectors, including retail and wholesale, boast more than 100 million connected devices each.

This is why a company's ability to connect to any device, application, and system in its infrastructure, and to make use of the existing data, has an outsized influence on its performance. Whether it is smarter logistics operations or remote technical guidance, access to knowledge from any device, at any time, helps people to work smarter.

And it is why businesses should not see remote technology and device connectivity as a means to an end. Instead, they should focus on what they can do with it.

How connectivity creates financial value

We surveyed 500 companies, including businesses in the automotive, industrial manufacturing, IT, and logistics, transport, and distribution sectors, to find out how they are progressing toward **seamless connectivity**. By this, we mean the extent to which staff can operate and connect (without interruptions from anywhere at any time):

Computers and other devices for information processing and management (information technology, or IT)

The hardware and machines that businesses use for their physical processes (operational technology, or OT)

Data and applications

Our research shows that 33% of businesses with excellent connectivity say their financial performance is among the leaders in their industry. Just 16% of businesses with good connectivity say this. And 34% with excellent connectivity say their operational performance is on a par with industry leaders; 19% with good connectivity say the same.

The link between connectivity and performance

Figures show those that indicate they are among the leaders in their sector/industry
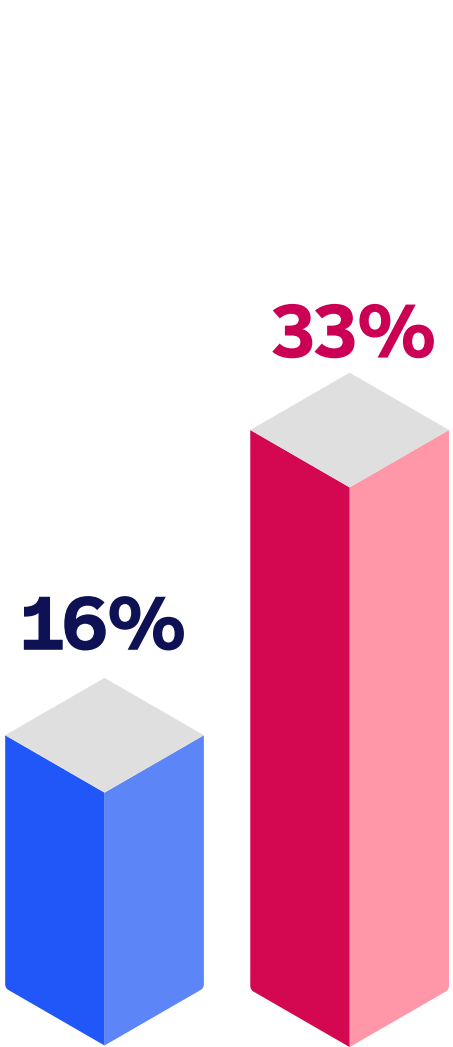
◆ Good connectivity
(Mostly good connectivity but with improvements to be made in several operational areas)

◆ Excellent connectivity
(Mostly seamless with a few areas – e.g., individual functions, geographies, or operational activities – working in technology and data silos)

Financial performance
↔ *17% difference*

Operational performance
↔ *15% difference*
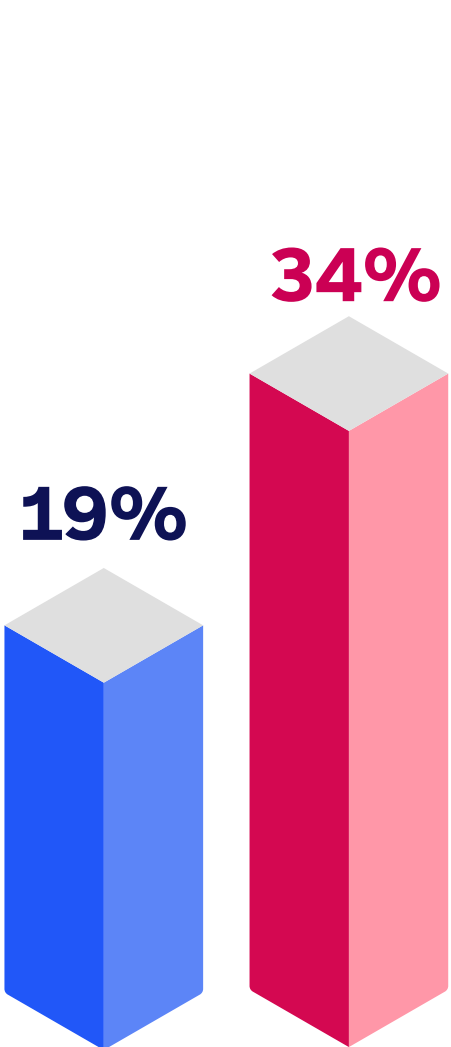
Cybersecurity performance
↔ *16% difference*

16%   33%

19%   34%

22%   38%
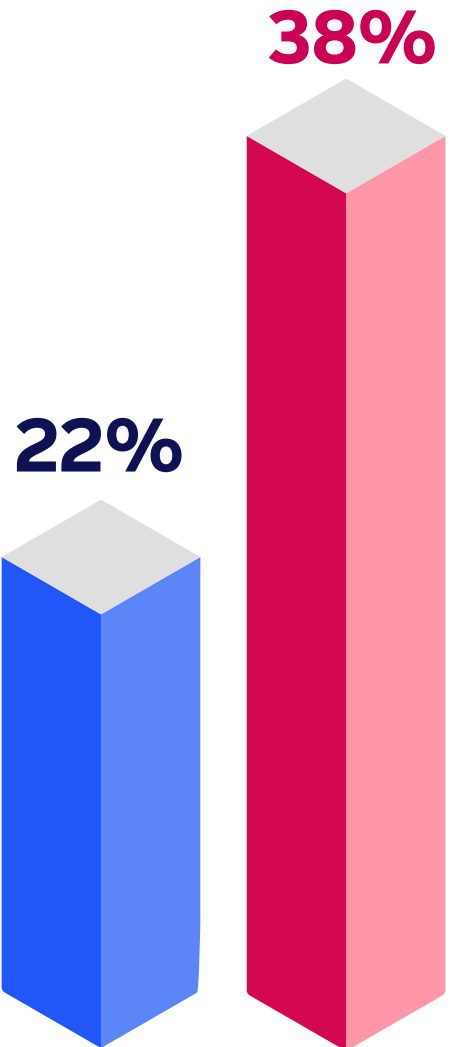
Connectivity also increases resilience and supports risk management. In particular, remote connectivity helps organizations to withstand the growing threat of cyberattacks by enabling real-time monitoring, as well as by providing a range of security features.

The potential benefits of connectivity will increase as technologies evolve. The rapid acceleration of artificial intelligence (AI), for instance, promises to speed up response times, especially for frontline workers.

Our research shows that only 5% of businesses say their technology connectivity is seamless across their organization. This means 95% have at least some gaps they need to close – and the opportunity to improve competitiveness, reduce the threat of cyberattacks, and take full advantage of technologies including AR and AI.

Many say their connectivity is already excellent.
For the rest, will "good" be good enough?

Our research shows that

only 5%
of businesses say their technology connectivity is seamless across their organization

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Why **connectivity** matters

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Every business is expected to do more with less and improve the return on technology investment. Whether it's after-sales service or product innovation, technology connectivity can help increase efficiency and improve performance. As data and insight flow seamlessly through the organization, every function has access to the information it needs to take the right decision quickly.

"You definitely have a more responsive organization, when you get it working right," says Stefan Baumgart, Director Product Management at TeamViewer. "You are absolutely more efficient, you are more accurate, and you have a faster response time – whether it's to your customer or to the other parts of a process. It can also reduce the employee's cognitive load."

"

You definitely have a more responsive organization, when you get it working right."

Stefan Baumgart
Director Product Management
TeamViewer

The case for connectivity

The global chemical and adhesives corporation Henkel has introduced a single solution that its IT helpdesk uses to support its employees' 60,000 devices worldwide. With each employee now connected via their devices, every member of the workforce is able to participate in the company's digital transformation.

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The goal is to create a gated and secure IT environment and empower employees to participate in the company's digital transformation.

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The benefits include greater productivity in the IT department and an immediate increase in employee satisfaction.
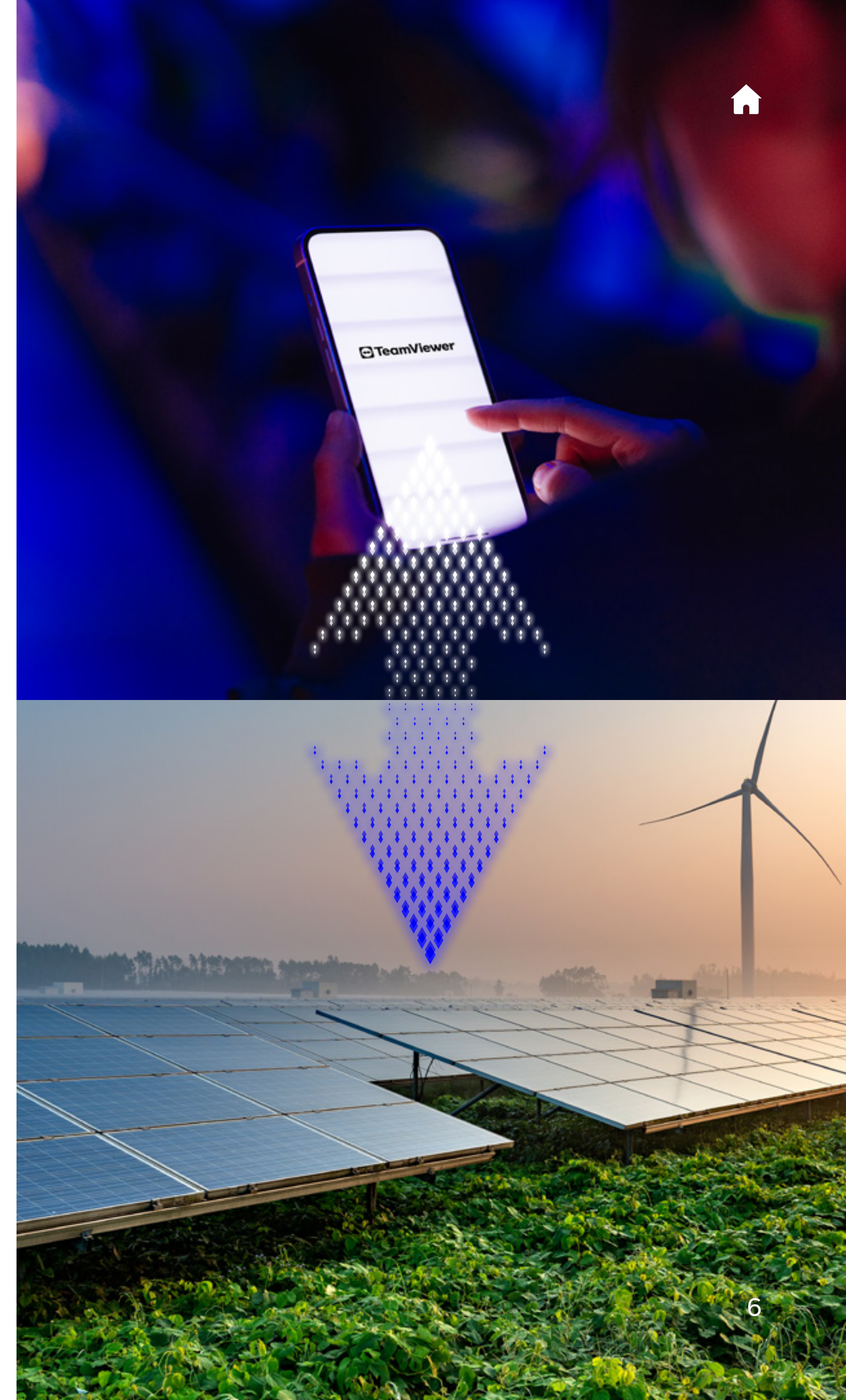
There are multiple examples of the benefits of connectivity. The UK company British Sugar, for instance, says a project to link four factories using a private telecommunications network has improved efficiency, productivity, and health and safety. Part of British Sugar's "Factories of the Future" initiative, the network enables staff and managers to monitor all four sites from mobile devices to get real-time updates on what is happening at each one.

Our research tells us that better connectivity also supports talent retention, and improves innovation and predictive maintenance.

Better connectivity

Talent retention

Innovation

Predictive maintenance
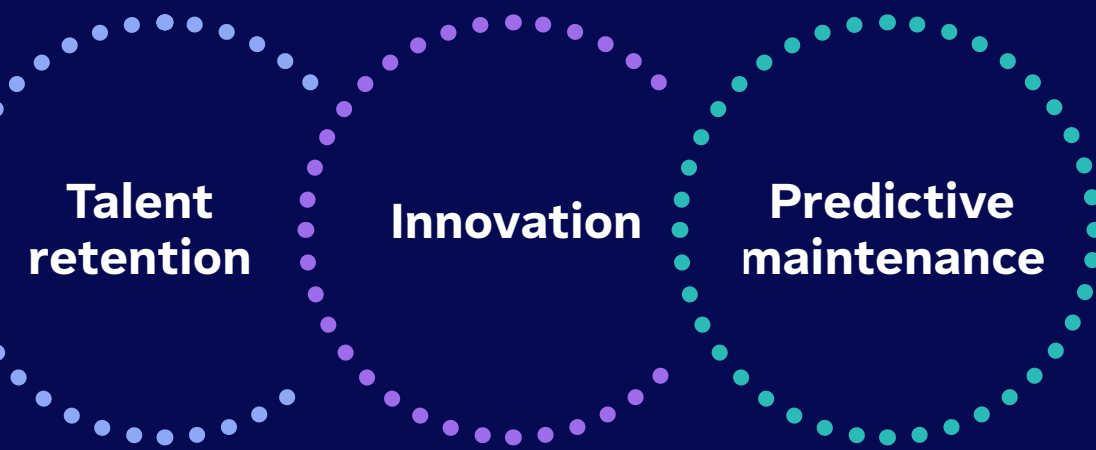
The business benefits of tech connectivity

Which of the following, if any, are the leading business benefits of technology connectivity at your organization?

31%
Improved efficiency and productivity

26%
Improved collaboration across teams and functions

25%
Improved levels of talent retention

24%
Improved predictive maintenance

24%
Improved innovation

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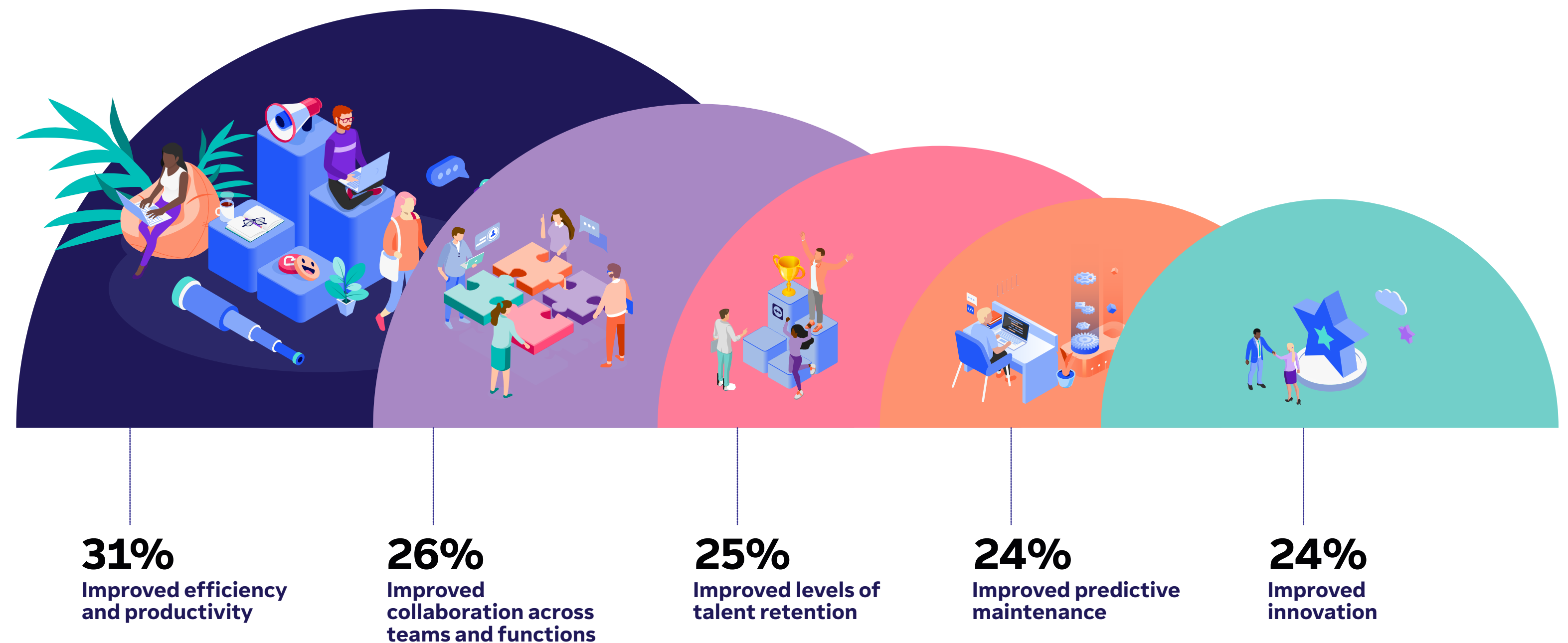
How better connectivity
creates an advantage

The ways in which connectivity helps businesses can be deceptively simple. Smarter software integration, for instance, means that staff do not waste time context switching. A single point of access can improve the experience of working with data.

Technology connectivity also supports process automation, which frees staff from manual and repetitive tasks so they can do work that's more mission-critical and enjoyable. If organizations can scale such automation, the impact on the efficiency and accuracy of work can be significant. The result? A greater sense of employee engagement and meaningful value for the organization.

Businesses can also use connected operational technologies to become more efficient. The ability to monitor and keep systems running – especially power-generation and sophisticated automotive systems – has significant cost and travel implications.

"When your machines and production lines are connected, you're constantly monitoring their operational metrics," says Mei Dent, TeamViewer's Chief Product and Technology Officer.

This monitoring provides the organization with the real-time data that fuels predictive analytics models. These tell the business when it needs to carry out maintenance – before a breakdown can stop production. "You don't need to send a technician to the site if you can log into a device remotely to put something right," says Dent.

Sacha Porges, Global Director for Program Quality at GKN Automotive, says that this predictive maintenance is a huge opportunity. "Let's say, for example, that you want to monitor the temperature of the bearings in a robot that does not have this as an existing facility," says Porges. "You can now retroactively 'bolt on' a sensor that will upload information into your cloud. You can set the desired operating parameters to monitor the status of the bearing to then build an effective, predictive maintenance schedule directly based on that data."
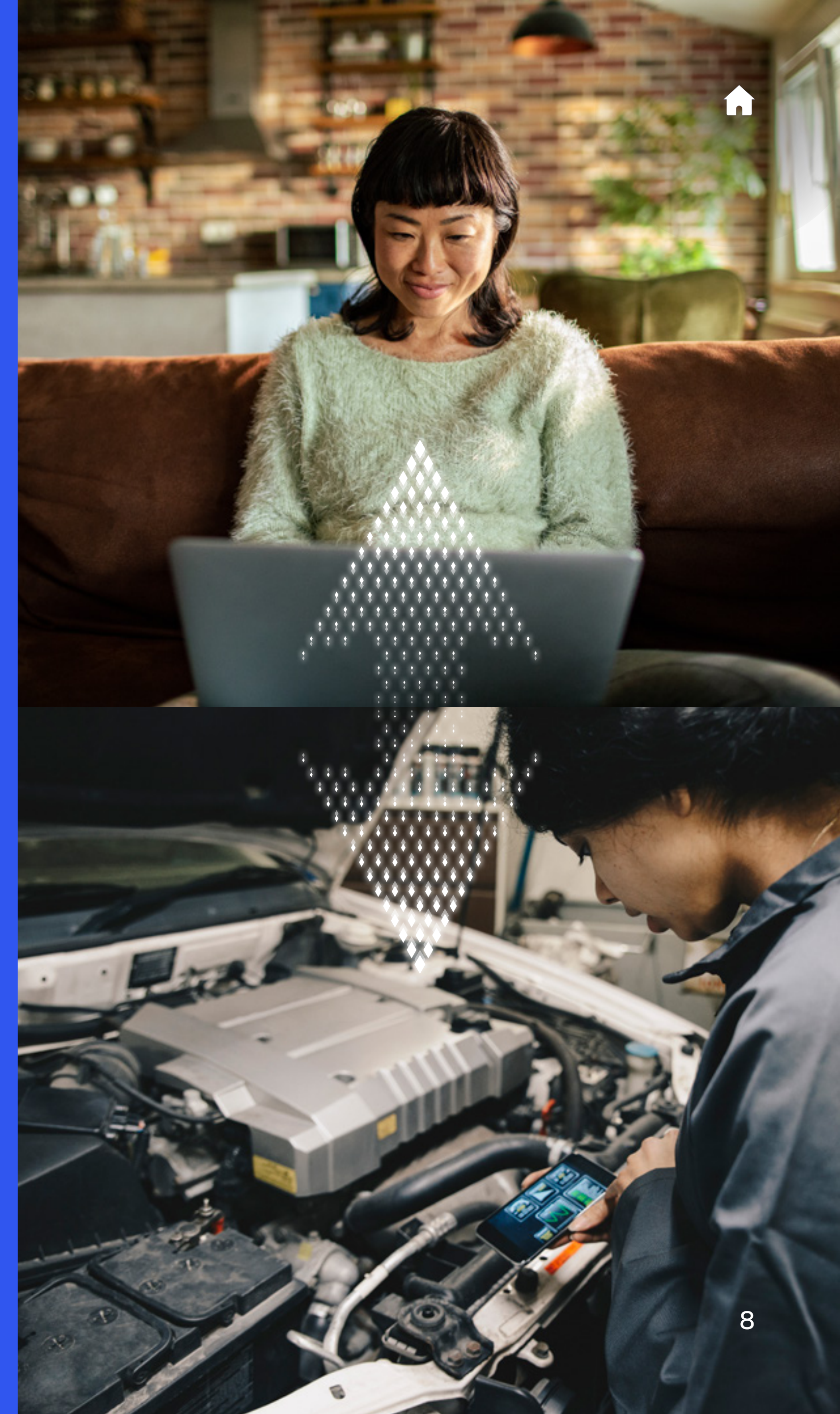
Connectivity drives collaboration at every type of business

Connectivity can also help staff at every organization to work together more seamlessly: 88% of businesses in our survey agree that connectivity increases collaboration across teams and functions. This isn't only true in the office, though connectivity certainly does help remote and hybrid-working employees access expertise and knowledge wherever they may be. It's also true for people working in a range of frontline and operational settings.

"In the manufacturing environment, machines are being driven by connected, highly orchestrated processes," says Stefan Baumgart. "There is no reason people can't benefit from that same thing."

Collaboration in industrial sectors often involves a range of external suppliers. Many organizations are using connected applications to share information securely and work collaboratively up and down their value chains, many of which are growing in complexity.

A joint project between BAE Systems, Digital Catapult, Maher and other suppliers is one example of that collaboration. The project looks at how to achieve a 20% reduction in supply chain costs through improved efficiencies using blockchain, the internet of

things, and AI to improve additive manufacturing processes for high-value aerospace components.

Sacha Porges offers another example. GKN is investigating increased use of digital twins for design and development work – building virtual versions of new projects that can then be tested, rather than having to depend on physical prototypes. "One of our biggest customers effectively wants 90% of our design validation testing to be conducted virtually," says Porges. "Rather than building a very expensive set of prototypes, we can simulate the prototypes to perform the majority of the necessary testing to minimize costs and time."

The automotive manufacturer Hymer, meanwhile, has worked with TeamViewer and Siemens on a joint project to optimize product development lifecycles using augmented reality technology. Hymer staff can visualize vehicles and their components in intricate detail, whether or not they are working at their desks.

As well as helping to provide operational reassurance, connectivity can also give individuals more autonomy. "From a manufacturing standpoint, think of an assembly line," says Baumgart. "If there is an issue and my cell is holding up the whole line, everybody suffers because of my inefficiency. If I can resolve it within my production time, everything keeps running smoothly."

By helping to resolve problems more quickly, connectivity can strengthen relationships: 80% of businesses say connectivity allows them to improve interaction with customers and clients.

The impact of dealing with customer issues, such as complaints and after-sales issues, can be severe. According to the Institute of Customer Service, the monthly cost to UK businesses of dealing with customer issues is £7.1bn; on average, staff are spending more than half a day a week on it.

80%
of businesses say **connectivity** allows them to improve interaction with customers and clients

Sustainability **benefits**

There is another crucial business benefit of improving connectivity. If staff have greater flexibility, it can help organizations to achieve their sustainability goals – many of which are being missed – and recruit and retain staff who are increasingly determined to work with more sustainable organizations.

Research suggests that remote working policies can help organizations to shrink their carbon footprints. A recent study published in the Proceedings of the National Academy of Sciences found that employees in the US who switched from working on sites to working from home could reduce their emissions by 58%. The biggest savings come from dropping the employee's commute and reducing the organization's energy usage. Our own research has found that TeamViewer users avoided 41 million tons of CO_2 emissions in 2022, mainly because remote connections reduced the need for travel.

In the workplace, connected sensors help organizations to collect granular data about their estate's energy consumption – from offices to manufacturing facilities. Businesses can use that data to manage their energy use far more effectively, and the impact can be dramatic. A project in Finland and Sweden, in which 365 residential homes used sensors to monitor temperatures and predict energy demand, saved 17 GWh of consumed energy, avoiding more than 1 kTonne of CO_2 emissions.

Poor connectivity damages **employee morale – and recruitment**

Businesses in many sectors are struggling with labor shortages and recruiting and retaining staff. **If they cannot keep their workforce happy, they will lose that fight. So what do staff want?**

Today's employees are looking for a technology experience at work that is as frictionless as it is in their personal lives. So the technology they use to work should be as simple and seamless as the technology they use to live and to play. And they want to be able to work productively and collaboratively whether they are working remotely, on their employer's premises, or both. Where they lack the skills and knowledge to manage an issue, they want to be able to secure support from experts in the organization, either in-person or through a remote connection.

Our research suggests that organizations recognize this: better talent retention is one of the top three business benefits of connectivity. But 25% say that access to their data and systems is average or poor for anyone working outside of company facilities, including at home. And 24% have the same concerns about staff working at company facilities other than their usual base. In the UK, this is even higher for those asked to rate their own ability to connect: 36% and 38%.

36%
rate their data and system access as average or poor outside company premises, even at home

38%
have the same concerns about company facilities other than their usual base
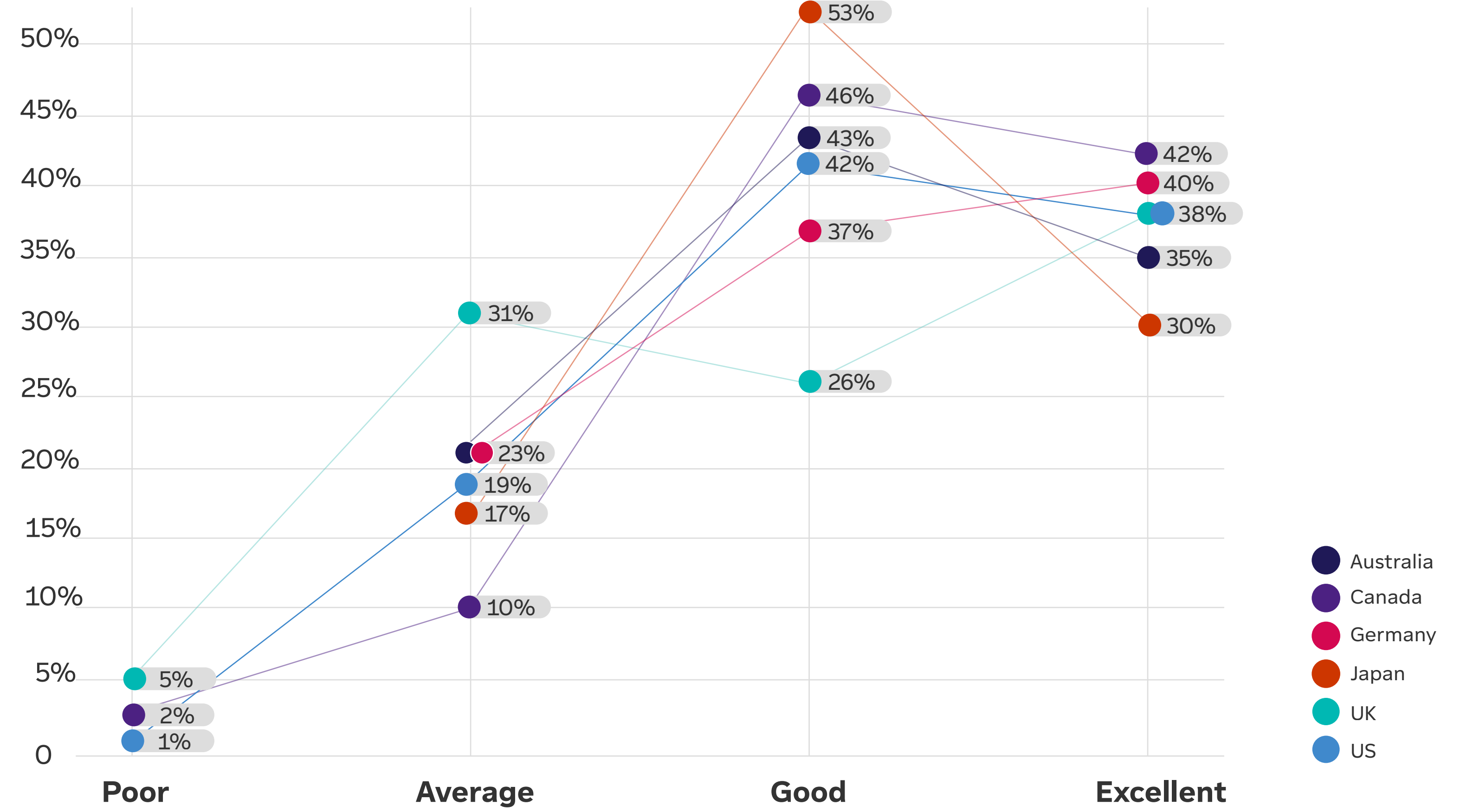
Accessing systems and data

When working in their usual workplace, how would you rate the ability of all employees to access the IT systems and data that they need?

Legend:
- Australia
- Canada
- Germany
- Japan
- UK
- US

Chart data points:
- Poor: UK 5%, Canada 2%, US 1%
- Average: UK 31%, Australia 21%, Germany 23%, US 19%, Japan 17%, Canada 10%
- Good: Japan 53%, Canada 46%, Australia 43%, US 42%, Germany 37%, UK 26%
- Excellent: Canada 42%, Germany 40%, UK 38%, US 38%, Australia 35%, Japan 30%

This type of poor connectivity might reduce these businesses' ability to compete for the best talent. An Akkodis survey of 14,800 employees in 25 countries worldwide, for instance, found that 76% of workers are looking for organizations that can provide them with the right systems and technologies.

Younger employees are more likely than others to choose roles and employers according to the technology they will be asked to use. This goes beyond offering flexible working. Younger employees might even prefer not to work remotely, because they are less likely to have well-equipped and comfortable homes to work from and are more likely to want to learn from more experienced colleagues.

Instead, workers are looking for technology that makes it easy to do their jobs well. Research from the London School of Economics shows that Gen Z and millennial workers are less tolerant of latency in communication, and get more frustrated with legacy solutions.

Technology connectivity can also help personal development and knowledge retention, particularly in highly technical industries. "You might have a technician that really knows their product and how to solve problems," explains Stefan Baumgart. "But when new engines, like hybrid, are rolled out, they are taken out of the production line to retrain somewhere else. Instead, you can give them the tools to augment their knowledge in the moment; that's what real-time connectivity helps solve."

How to break down the connectivity barriers

➔ Quantifiable results illustrate the ROI

➔ Data needs consistent practices

➔ Businesses are held back by data illiteracy and security concerns

So businesses are better connected. What is stopping them from changing their connectivity from good to excellent, and from excellent to seamless?

For **businesses that currently have good connectivity** but want to make it even better, integration can be a problem: 30% of these businesses say the different mindsets and attitudes of their people get in the way of improvement. More than a quarter, meanwhile, say it is difficult to demonstrate the return on investment (ROI) in connectivity, and this is most likely to be a problem for the fifth of businesses that say budget constraints are a problem.

The challenges are slightly different for **businesses that currently have excellent connectivity** but now want to become seamless. Concerns about cybersecurity are the leading barrier. And they are more likely to be worried about their skills gaps. They also say that previous projects have fallen short of expectations.

Overcoming many of these problems will be an iterative process, says TeamViewer's Mei Dent. "The early adopters, particularly when looking at frontline operations, start with a proof-of-concept phase for their particular use case," she says. "Then there is a productivity gain or a quality improvement that they can take to other stakeholders." Individuals with capacity to embrace new technology can help boost more widespread buy-in.

Quantifiable results illustrate the ROI

This ROI story is important, adds Dent: "It's usually the innovation budget that funds the proof of concept, but it won't fund the full implementation – that requires a clear and provable return on investment."

Working in this way will also help with other problems: quantifiable results will help senior leaders to appreciate the benefits of greater connectivity. When asked who is **the biggest barrier to improved technology connectivity, businesses are most likely to say the C-suite (42%)**, which suggests that more needs to be done to gain the support of the leadership.

Thirty-two percent of businesses say that digital transformation employees are the biggest barrier, while 25% say IT employees. So organizations also need to get support from these colleagues, who might be expected to be facilitators rather than blockers. It may be that they need help to feel more reassured in areas such as cybersecurity and data protection.

Businesses need to recognize that doing nothing has its own costs, and the case for investment will be stronger at organizations that have analyzed those costs. According to research from Deloitte, technical debt has direct costs, including the capital and operating expenses required to maintain legacy hardware and software. But it also has indirect costs, such as the greater inefficiency of these systems. Add in costs such as time-to-market delays and innovation deficits that hamper competitiveness, and it becomes easier to build a business case to upgrade.

"In this connected work environment, if somebody has a problem, they can connect to a remote expert and save the time it takes to get a senior engineer to the site," says TeamViewer's Stefan Baumgart. "The value of getting a system back up and running sooner is usually many times more than the cost of a software license, so we see the cost of the solution recouped the first time it's used."

42%
of businesses

identify the C-suite as the biggest barrier to improved technology connectivity

The barriers to greater connectivity

What are the biggest barriers to improved technology connectivity across your organization?

● Overall   ● Highest among those with good connectivity

30%

25%

23% Concerns about cybersecurity

23% Preference among markets/functions for their own technology solutions

21% Budget constraints

21% Inability to show return on investment

21% High levels of skepticism that improved connectivity is possible

Cultural differences between different parts of the organization (e.g., between those managing and using IT and OT)

Concerns about cybersecurity

Preference among markets/functions for their own technology solutions

Budget constraints

Inability to show return on investment

High levels of skepticism that improved connectivity is possible

⬡ TeamViewer

Data needs consistent practices

Better connectivity enables data to flow smoothly throughout the business from one function to another and through both IT and OT, which helps the organization to make better-informed decisions. But some companies are not pursuing these opportunities because of how they handle and access data.

To resolve this, they need to agree standard practices for managing data throughout the business: about one-third are dealing with conflicting practices. Aligning data management should make it easier to create a single version of the truth – one set of data that everyone uses. At the moment, 45% of businesses in logistics, transport, and distribution say that multiple versions of the truth, based on different sets of data, undermine trust in internal data.

"The analogy I always use with organizations is that it is a bit like looking at a bucket and at water," says Caroline Carruthers, CEO of global data consultancy Carruthers and Jackson. "Technology is responsible for the bucket – for making sure it's the right size and shape and made out of the right material. The data team is responsible for where the water in the bucket comes from and goes to – how it gets to the right place, whether it's the right purity and so on. Those two things must work together. There are still too many organizations carrying around sloppily filled buckets of water."

But businesses should not let perfect become the enemy of good. "We've got ourselves into a habit of thinking we need all the data," says Carruthers. "But simpler is better. What is the minimum amount of information that I need from you? Let's work on that first."

Businesses are held back by data illiteracy and security concerns

Improving levels of data literacy throughout the business will allow more employees to take advantage of connectivity. Our research suggests that smaller organizations have the most to do here. Among businesses with annual revenues of $10m–$50m, 40% say mistrust of internal data reflects a lack of data literacy, but for businesses with sales of more than $10bn a year it drops to 21%.

Strengthening data security should also be a priority. Among the smaller companies in our research, 70% say concerns about security of data are holding back their ability to connect teams and functions remotely. More than half (54%) of the largest businesses in our research say the same.

Carruthers' advice is to focus on purpose. "The starting point should be what we are trying to get to – our collective goal and how we all work toward that," she says. "People say, 'We can't do that because of GDPR.' But actually, GDPR lets you do an awful lot."

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How to close the gap between IT and OT

More than three-quarters of the businesses in our research do not yet have completely effective connectivity between IT and OT across some important areas of their organizations. In areas that include data integration and analytics and unified architecture, four in 10 say that they connect to only some or a minimal extent.

In many cases, IT and OT departments have separate budgets and key performance indicators (KPIs). They can appear to speak different languages. The reality, as TeamViewer CEO Oliver Steil told the Web Summit in Qatar in February 2024, is that IT and OT start from different places. "Deploying new software from the IT side is a common, well-known process with updates from the cloud where you're used to certain issues and downtimes," he said. "But from the plant perspective, this is horrible. The cost associated with even a short
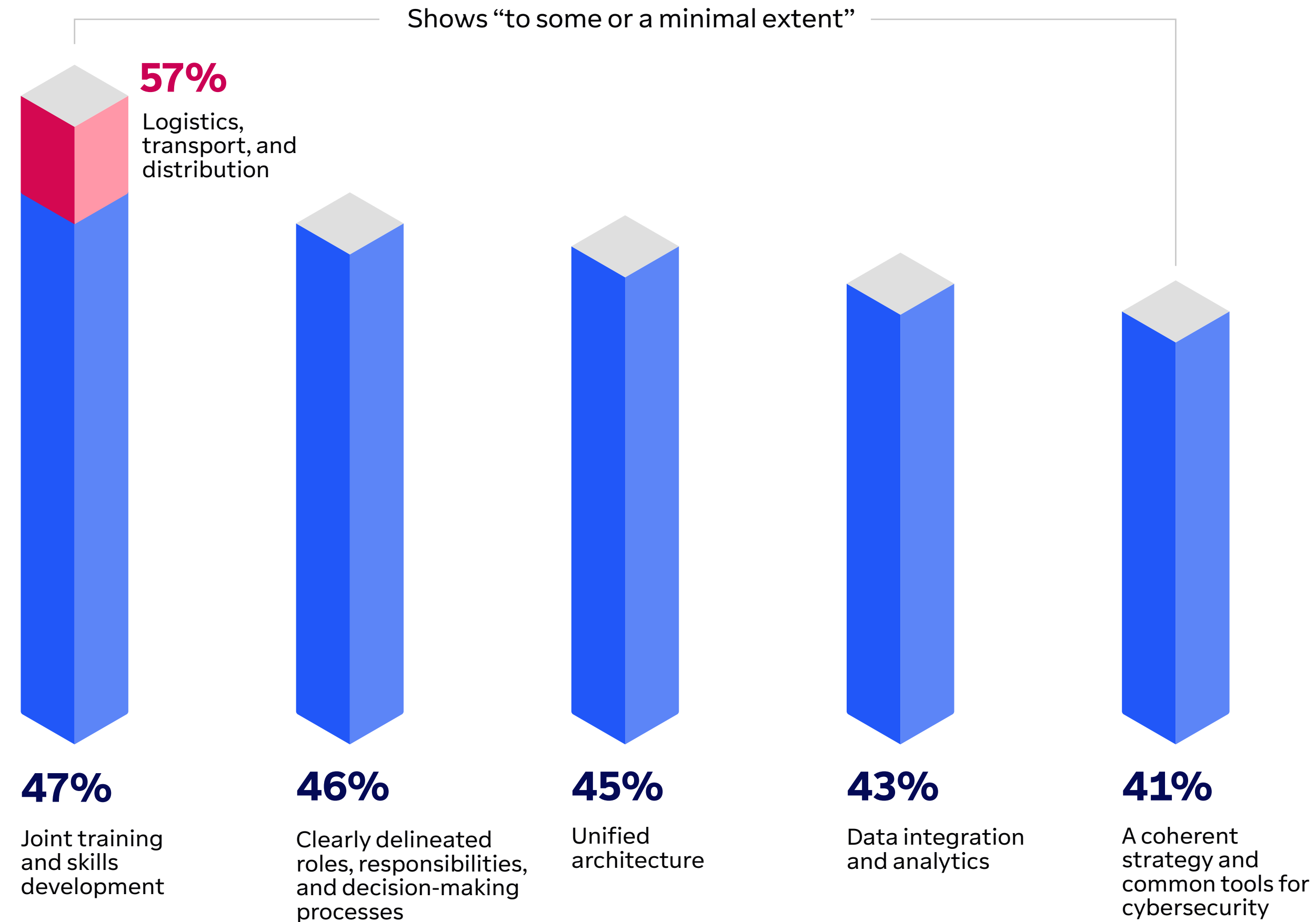
downtime is enormous and people won't accept that."

So the task is as much about change management as it is about technology. "You need to agree on the KPI set," said Steil. "If you look at how IT typically solves problems – service availability, mean time to resolve – it is all well known. It is a very different language when you talk to the OT side. Their key metrics – overall equipment effectiveness, set up time, jobs per hour, downtime – are very different measurements. You need to bring these people together and agree a common KPI set before you have a productive outcome."
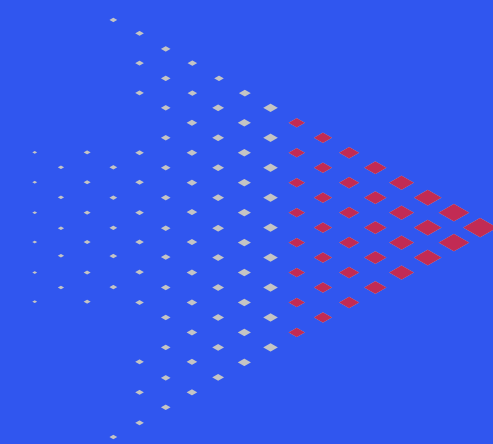
43% say that IT and OT are completely or to a great extent largely isolated from each other

The effectiveness of IT and OT connections

To what extent do operational technology (OT) and information technology (IT) connect effectively in the following areas at your organization?

Shows "to some or a minimal extent"

57%
Logistics, transport, and distribution

47%
Joint training and skills development

46%
Clearly delineated roles, responsibilities, and decision-making processes

45%
Unified architecture

43%
Data integration and analytics

41%
A coherent strategy and common tools for cybersecurity

Get smart with legacy systems

Vivek Sharma, Global Head of Partner Management at Bosch Digital, suggests several ways to close this gap. "Organizational silos and legacy systems can impede digital innovation," he says. "Addressing these challenges requires a smarter approach, with collaboration across functions and regions as well as investment in talent and technology."

Some investment will inevitably have to go into technical solutions, such as integrated platforms that connect between IT and OT and enable data exchange and integration. As more businesses move toward software-defined manufacturing, IT and OT need to be seamlessly connected from the start.

Bring people together

Sharma also stresses the importance of collaboration. "You need to encourage cross-functional collaborations within or between IT and OT teams," he says. "You need regular communication channels, joint meetings, and workshops. It should never be a game of 'us versus them.'"

Setting goals and objectives that align IT and OT naturally will also help. "We always try to define common objectives and key performance indicators," says Sharma. "The focus is on outcomes such as equipment reliability, uptime cost savings, and operational efficiencies."

Recognize the security risks

Sharma says that Bosch also looks at the connectivity risks, and is introducing common governance policies on data security and protection. It is also addressing concerns about the cybersecurity exposures that connected devices and OT can create.

"We have to protect against any possible data breach and any unauthorized access to the millions of sensors in our network infrastructure," says Sharma. "A weakness in network architecture, a configuration error, or inadequate security control could compromise the integrity and availability of the systems and data."

GKN's Sacha Porges underlines this point. "We have very strong encryption around our systems," he says. "We must protect our proprietary information, and the risk of a cybersecurity breach – such as hacking into our manufacturing sites – is always present. That would compromise our competitiveness or even severely damage a production line."

Lighting up shadow IT

Improving connectivity throughout the organization makes it easier for employees to work productively on any device in any location. But it also creates risk. Our research highlights the dangers of shadow IT, which is the use of unsanctioned hardware, software, applications, or services within the organization.

At the Australian cosmetics business Aesop, leaders were growing increasingly concerned about this kind of vulnerability – particularly as data and security regulation became more stringent. The business has more than 400 points of sale across 27 countries. So it introduced a single endpoint management controls system covering more than 2,500 devices.

In our research,

62% of businesses

say that employees' rogue personal technology use is now a significant potential risk at their organization

These numbers could go even higher. Gartner predicts that 75% of employees will acquire, modify, or create technology outside of their organization's IT team's visibility within the next three years – up from 41% in 2022.

There have already been high-profile breaches. The software company Okta, for instance, blamed a 2023 breach of its systems on an employee who signed into their personal Google account on a company-owned device.

The race to exploit AI also poses risks. According to Freedom of Information data gathered by software company WalkMe, nearly four in 10 UK local authorities are allowing employees to use AI tools without a responsible policy in place.

Better asset management and discovery tools help businesses to trace what hardware and software is connected to their networks, whether it is authorized or not. This enables the organization to work out whether all these connections are needed and how to make them safer.

The future of better **connectivity**

➜ Seeing is believing

➜ AI pushes connectivity to the next level

![TeamViewer]

In any conversation about the potential of advanced technology, it is easy to forget the current impact of technology connectivity.

80%
of organizations say it allows for better customer interaction

86%
say connectivity is a strong aspect of working at their company

81%
say it enables greater innovation

85%
say it improves the visibility of the supply chain and potential issues

84%
say it provides a real-time overview of operational performance and challenges

What impact does the current state of technology connectivity have at your organization?

But there is work to do. For example, only 42% of organizations say that connectivity speeds up information-gathering to allow more time for value-driven work, and only 27% say it decreases the time needed for employee training.

Seeing is believing

In many sectors, increased technology connectivity appears to be transformational. In the automotive industry, for instance, more than two-thirds of organizations say that improved connectivity has enabled them to create lower-cost processes and/or more efficient workflows.

But advances in augmented reality and wearable technology could do even more. Ford Motor Company, for example, has equipped technicians at its dealerships with smart glasses. If they are working on a car and cannot resolve a problem, they can use the glasses to stream real-time video to remote experts who can help them solve it. These glasses incorporate augmented reality software so they can display information that the expert shares, such as images, diagrams, and 3D markers. So far, Ford employees have conducted 20,000 support calls in this way and reduced resolution times to as little as 30 minutes.

"When you use augmented reality technologies and sensory data as opposed to typical network data, you can improve automation throughout the manufacturing process," says TeamViewer's Mei Dent. "That's when you really start to move the needle in terms of workflow optimization."

These technologies offer the promise of a new level of remote understanding. The ability to capture high-fidelity 3D images allows experts – wherever they are in the world – to see the fine details of highly complex machines. In warehouse logistics, they also can speed up processes, reduce error rates, and enable faster picking and delivery of goods.

AI pushes connectivity to the next level

As companies increase their experimentation with AI, the opportunities for smarter and faster connectivity increase. "Adding AI to the connectivity mix will produce a quantum leap forward," says Dent.

However, the pace of change shouldn't detract from the purpose of use. "AI is evolving very quickly, but you need to understand the business case," says Dent. "It's not a magic bullet – it requires hard engineering work and a controlled feedback loop."

Businesses need a unified strategy for their application of AI, says GKN's Sacha Porges. "As a global company, we require standardization," he says. "There are multiple vendors with many interesting solutions, but the ideal solutions will be scalable quickly and simply so they can be deployed globally throughout our footprint. We also need partners that are willing to support us to learn these systems for ourselves so we can achieve an acceptable level of autonomy."

Dent is especially optimistic about edge computing, which allows AI tools to work with data on local devices at the edge of the network where the data originates. This reduces dependence on cloud computing and enables real-time decision-making.

According to research from Wevolver, edge computing is used in a range of industrial and manufacturing settings. For example, leading producers could collect data about processes such as production scheduling, quality inspection, and asset maintenance, and analyze the information to identify how to optimize these processes.

Exploiting insights in real time is difficult because of the latency of cloud computing, but edge computing could resolve that challenge. It is a market that is predicted to grow from $26.74bn in 2024 to $186.44bn by 2032.

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Time to close the **gaps**

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The findings of our research provide a call to action. Just one in 20 businesses are currently confident that their technology connectivity is seamless across their organization. The rest have at least some gaps, and these shortfalls potentially threaten their ability to secure competitive advantage, expose them to unnecessary risk, and prevent them from exploiting opportunities afforded by emerging technologies.

This is understandable. No business is starting with a clean sheet of paper. Their technology stacks have developed over an extended period, often requiring IT teams to patch legacy systems to new additions. In addition, many businesses struggle with a lack of understanding of the benefits of connectivity or with skills shortages. Leaders might not have committed to making technology connectivity a business priority, or the organization may be operating in silos.

Now is the time to resolve these issues. Growing numbers of businesses can see the opportunities to invest in seamless connectivity – and are beginning to reap the rewards. Those organizations that leave it too late risk being eclipsed by competitors whose staff enjoy frictionless access to connected IT and OT devices and machines, as well as to the organization's data.
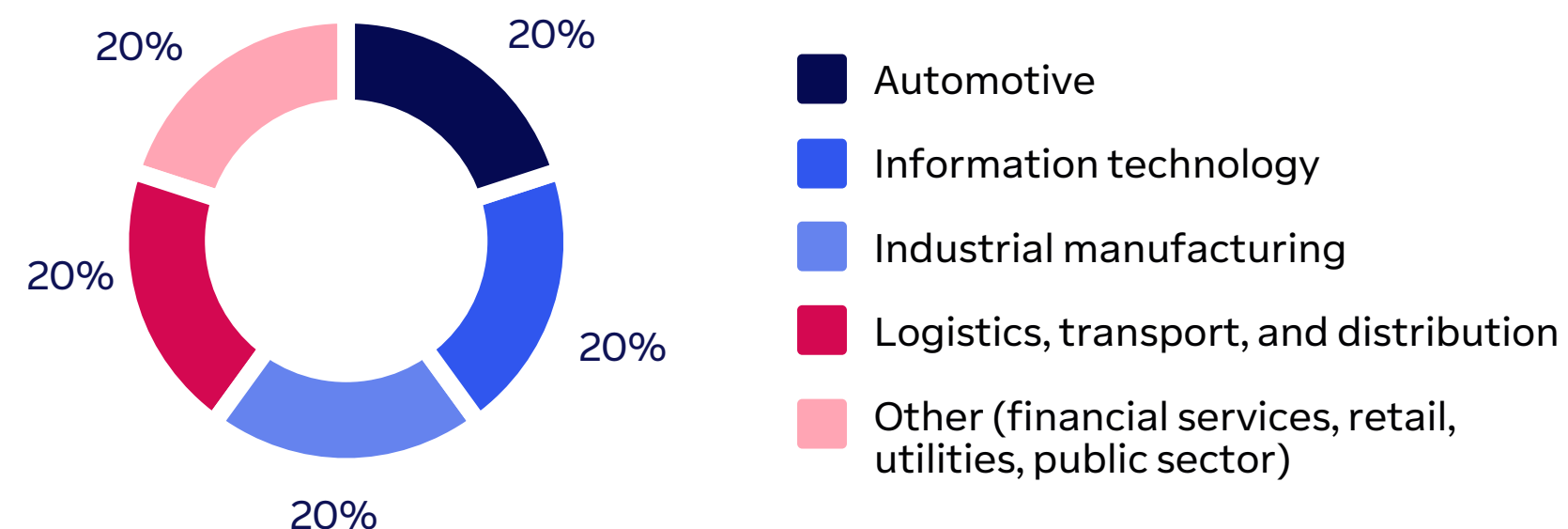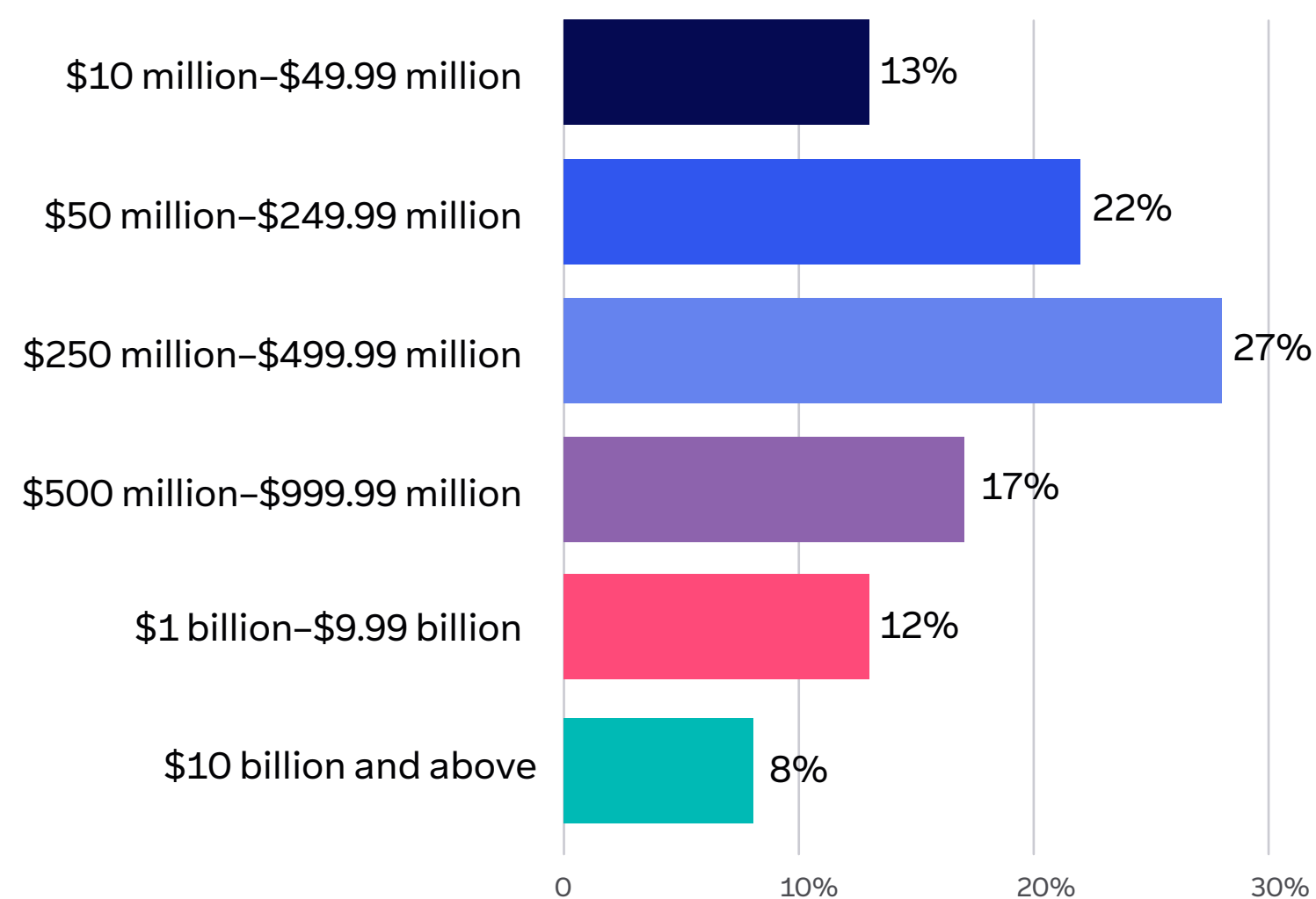
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About the **research**

This research was conducted in collaboration with FT Longitude between March and April 2024. We surveyed 500 business leaders across six countries: Australia, Canada, Germany, Japan, the United Kingdom, and the United States.

Sector

- Automotive — 20%
- Information technology — 20%
- Industrial manufacturing — 20%
- Logistics, transport, and distribution — 20%
- Other (financial services, retail, utilities, public sector) — 20%

Annual revenue

Revenue	Percent
$10 million–$49.99 million	13%
$50 million–$249.99 million	22%
$250 million–$499.99 million	27%
$500 million–$999.99 million	17%
$1 billion–$9.99 billion	12%
$10 billion and above	8%

Department

Department	Percent
IT support	18%
Information and operational technology	17%
Logistics/ supply chain	13%
CEO	11%
Customer service	10%
Marketing	10%
Central support functions (finance, HR, legal, etc)	7%
Product development (including software)	5%
After-sales service (including field service)	4%
Board member	2%
Production/ manufacturing	2%

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