



Consumerization of IT and
BYOD Plans

**Purchase Intentions –
Spring 2013 EMEA**

Key Takeaways:



- **Primary drivers of BYOD:**
 - To make workers more productive
 - To make worker collaboration better
 - Pressure from business leaders



- **94% fear a potential network security breach as their highest concerns regarding the consumerization of IT**
 - More than 9 out of 10 people are looking for a solution to keep corporate data inside their organization and secure.
 - This percentage has grown over 40% from 2012 to 2013



- **Top IT spending areas that are likely to increase or have because of a BYOD project:**
 - Network Security
 - Wireless Networking
 - Mobile Application Management
-

Survey Demographics

141 Total Respondents

What best describes your role at your workplace?

- 36% IT Admin/Staff
- 23% IT Manager/Director
- 12% Line of business professional, manager, director or VP not affiliated with an IT product or SP
- 11% CISO
- 6% Compliance Officer
- 4% VP/EVP IT executive

Employee Size

- 31% 1-99
- 23% 100-499
- 7% 500-999
- 16% 1,000-4,999
- 5% 5,000-9,999
- 5% 10,000-25,000
- 12% 25,000+

Industry

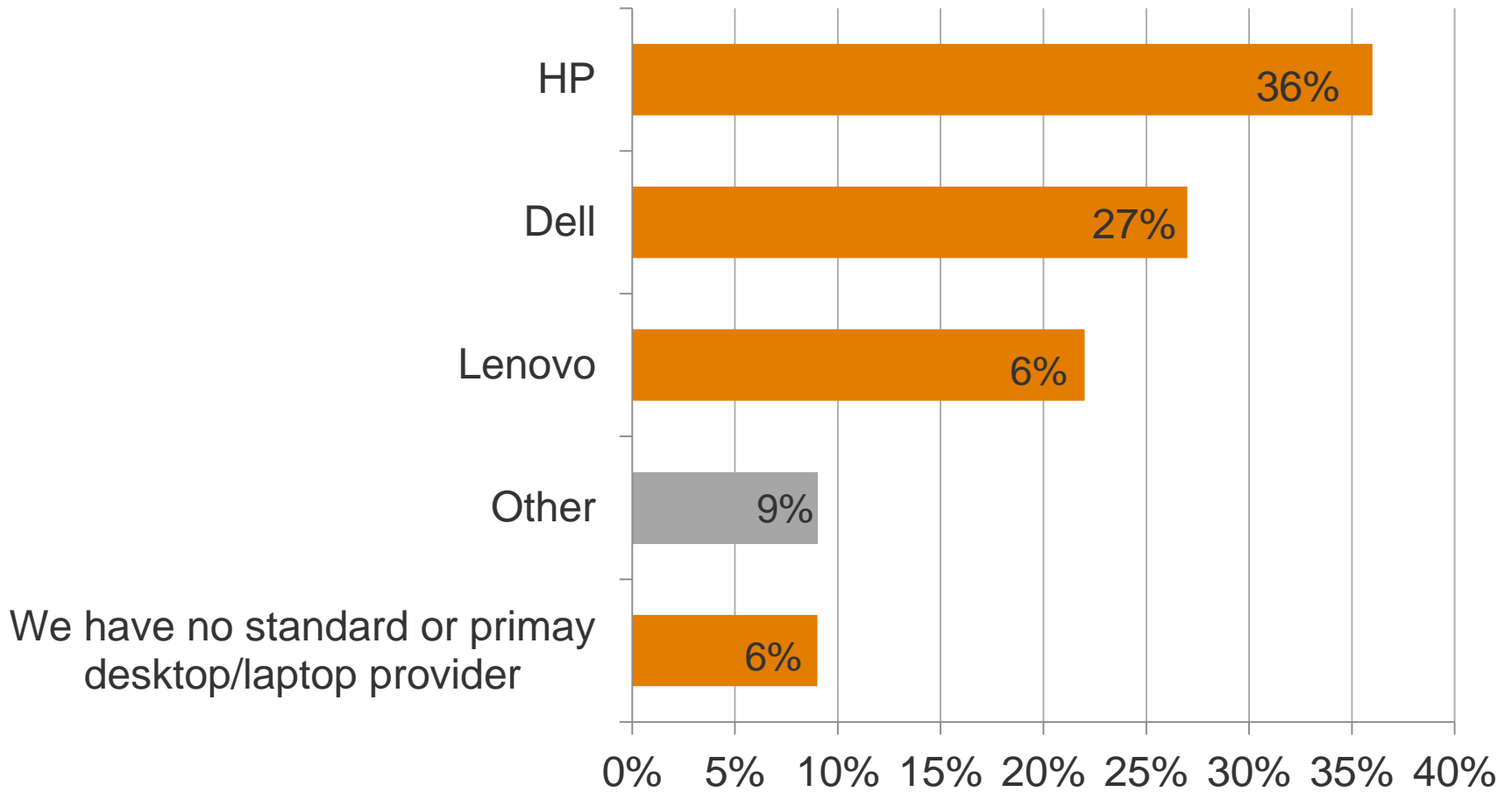
- 21% IT-related Manufacturing/Distribution/Services
- 18% Financial Services
- 14% Non-IT Manufacturing/Distribution/Services (including pharma)
- 9% Consulting
- 7% Education
- 7% Other
- 4% Government - Federal
- 4% Health Care (non pharma) Manufacturing/Distribution/Services
- 1% Transportation
- 1% Retail

Where do you work?

- 71% Europe
- 29% Middle East

Survey Demographics (cont.)

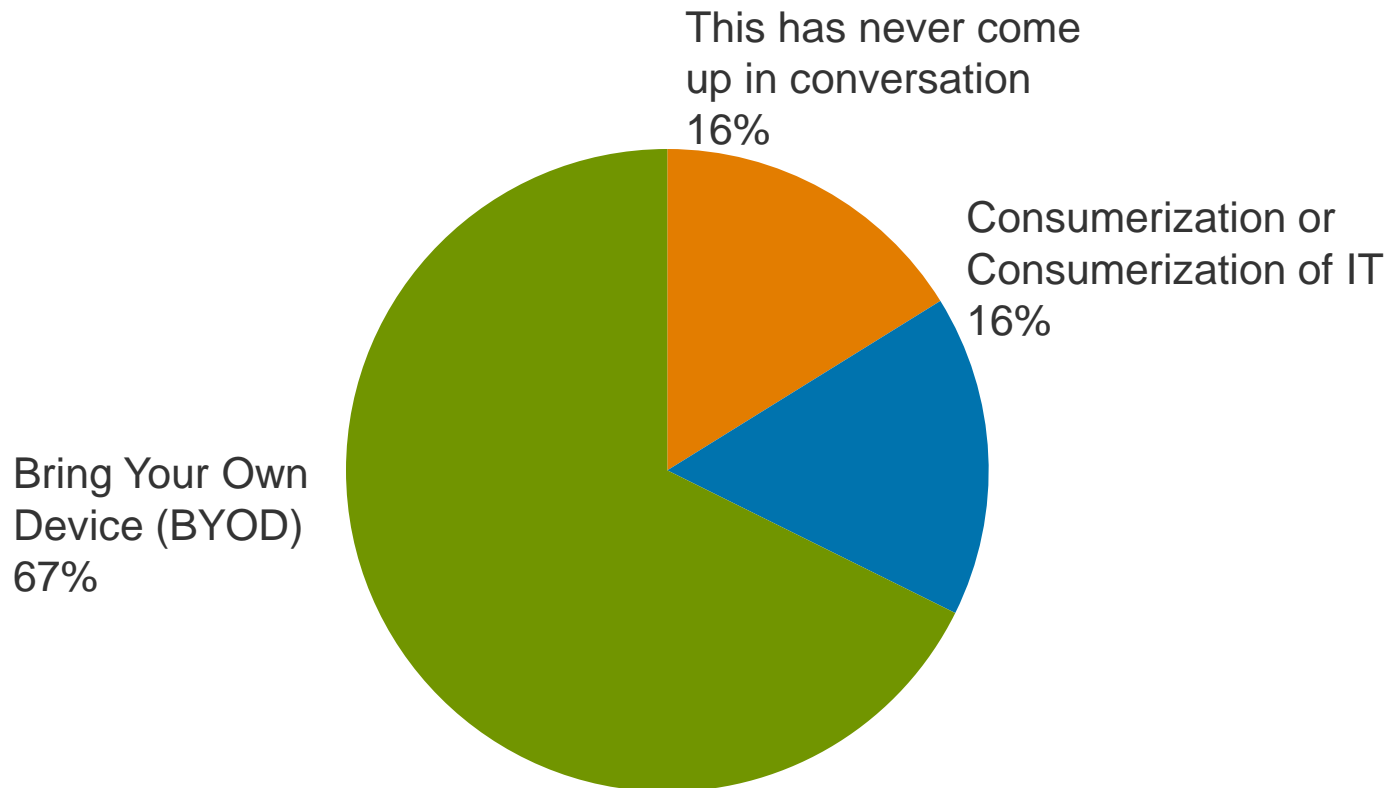
- Which vendor is or was your primary desktop/laptop hardware provider?



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“BYOD” trumps “Consumerization”

- *The terms of “Consumerization of IT” and “Bring Your Own Device” (BYOD) are often used interchangeably. Which of these terms is the one you last used to describe the phenomenon whereby end users decide upon and select their own devices and/or applications without necessarily involving the IT department?*

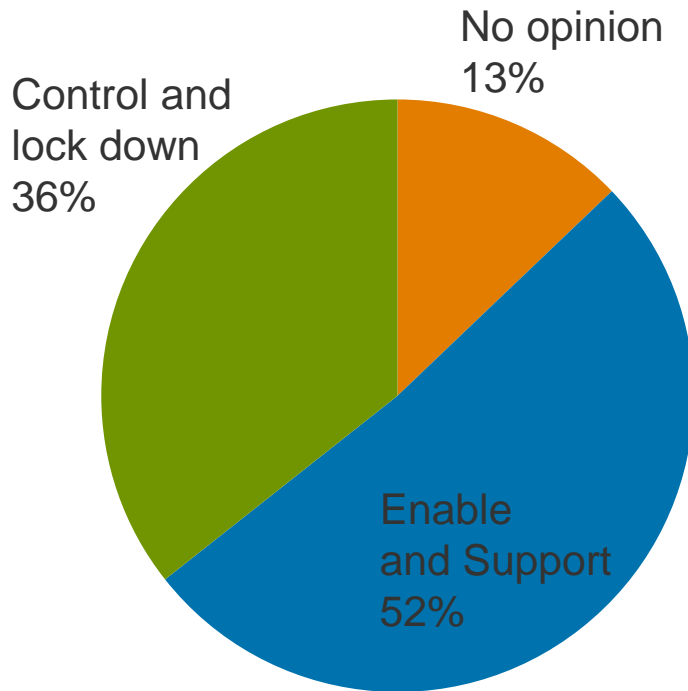


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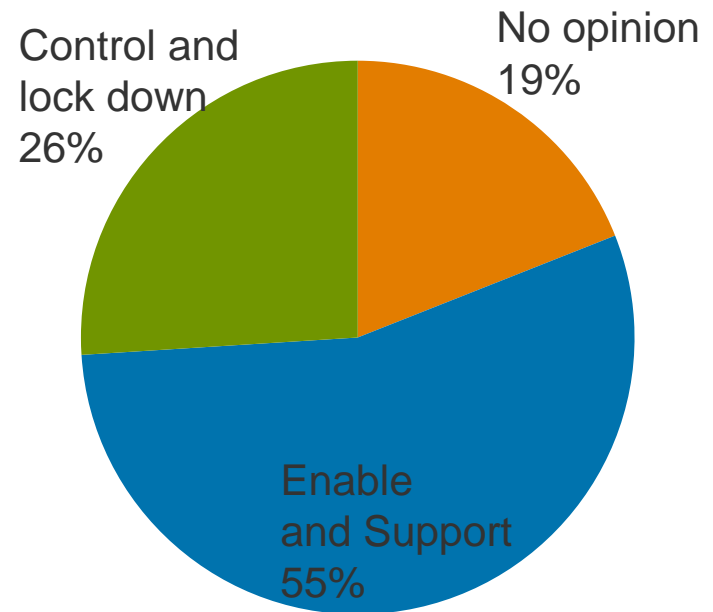
Reaction to “consumerization of IT”: Majority Still Wants to Enable and Support

- When you hear about “consumerization of IT” what is your first reaction?

2013 Data



2012 Data

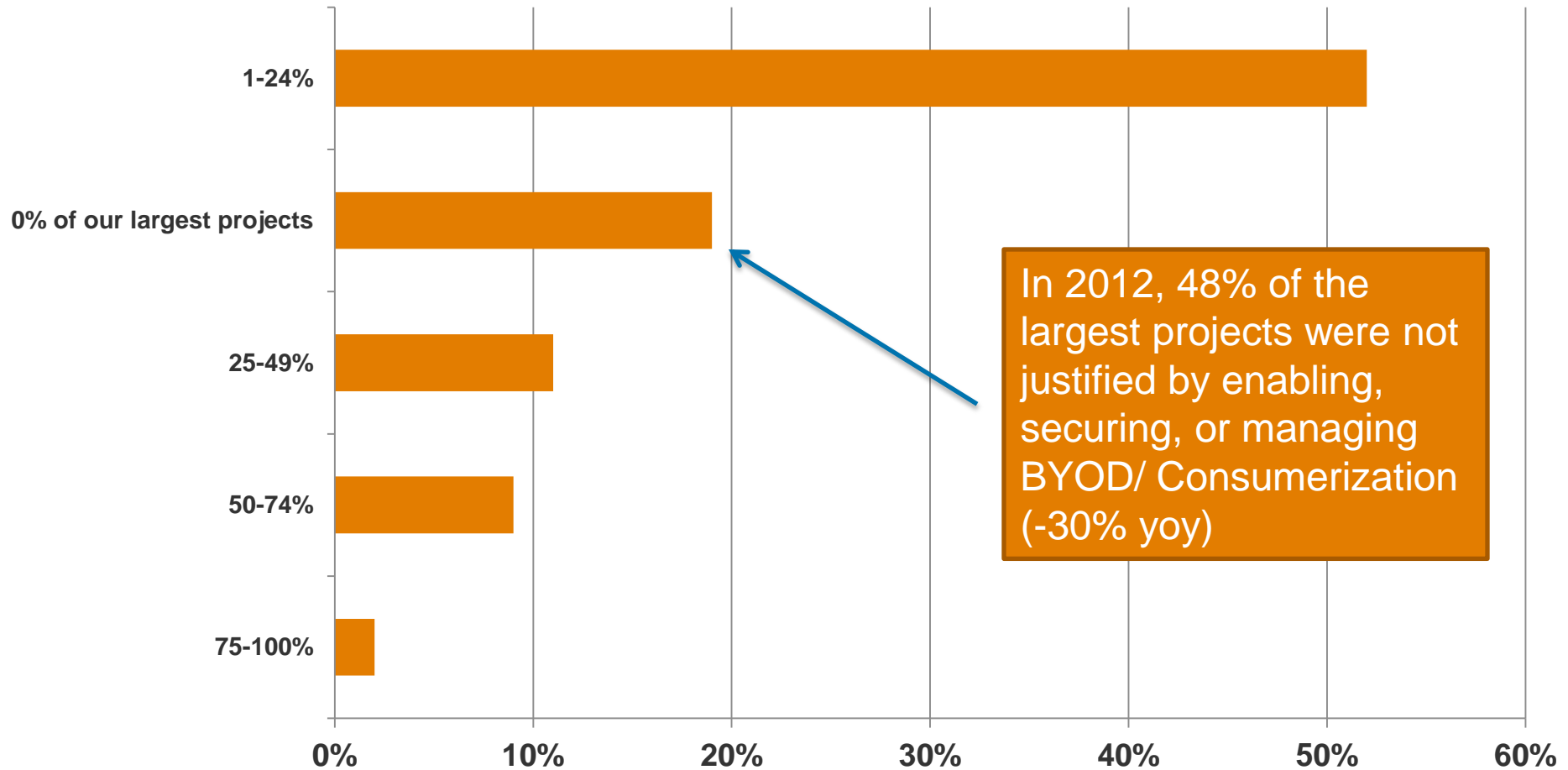


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Majority of Audience has Large Projects Driven by BYOD

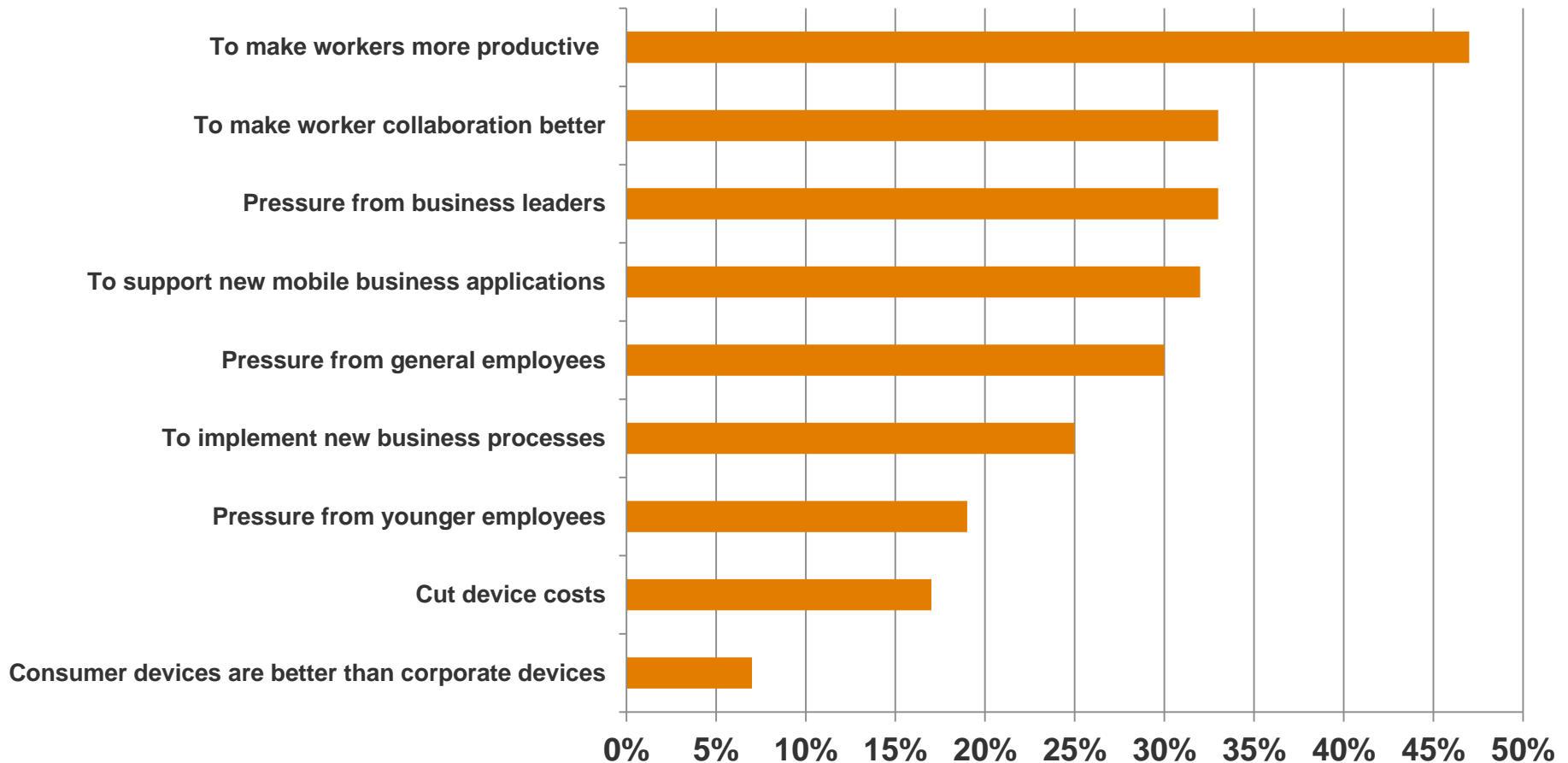
- How many of your largest projects for the next 12 months will be justified as enabling, securing or managing either BYOD or consumerization of IT?

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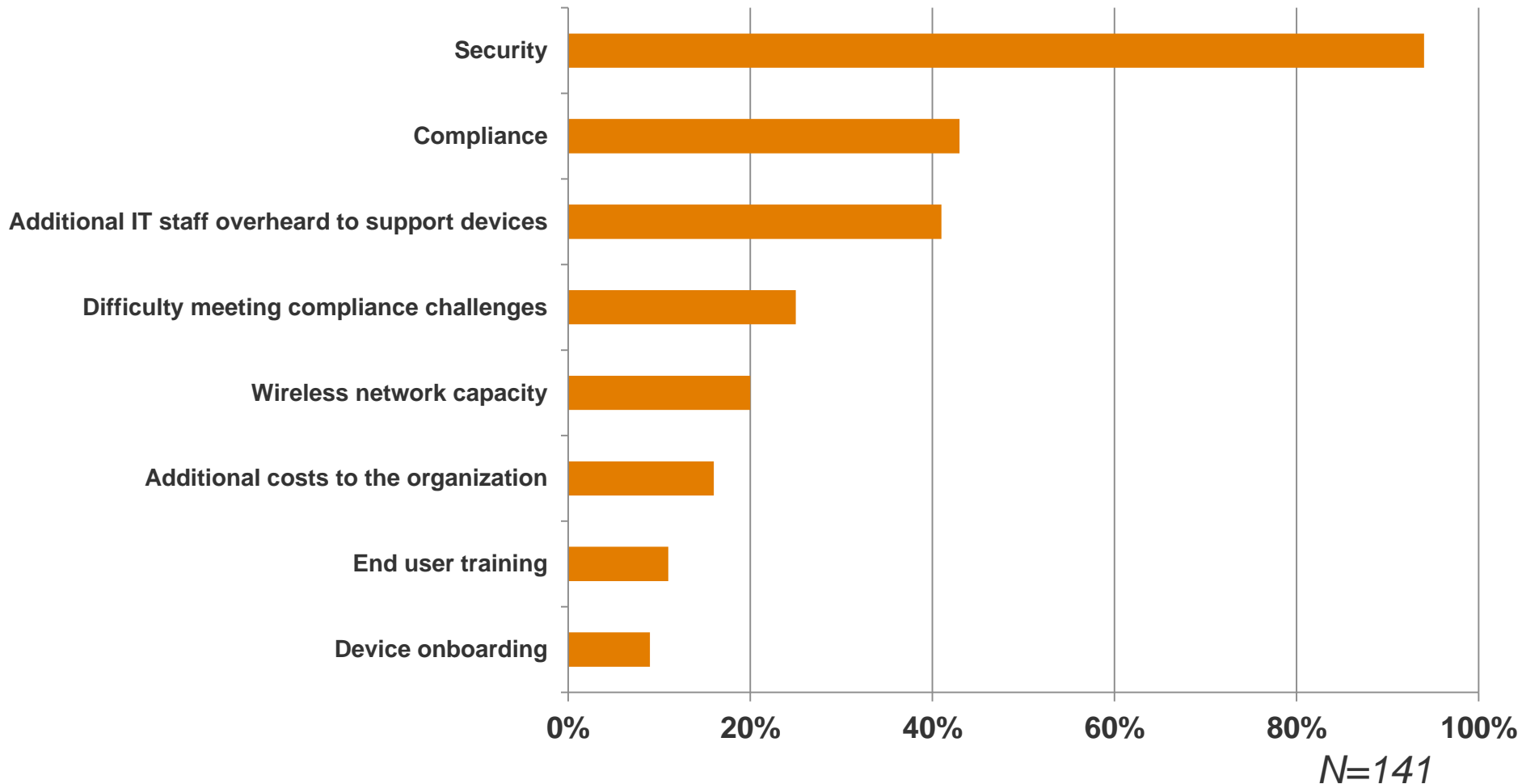
Pressure from business leaders: Key Driver for BYOD

- Which are the primary drivers for the consumerization of IT/BYOD within your organization? (Select up to three)

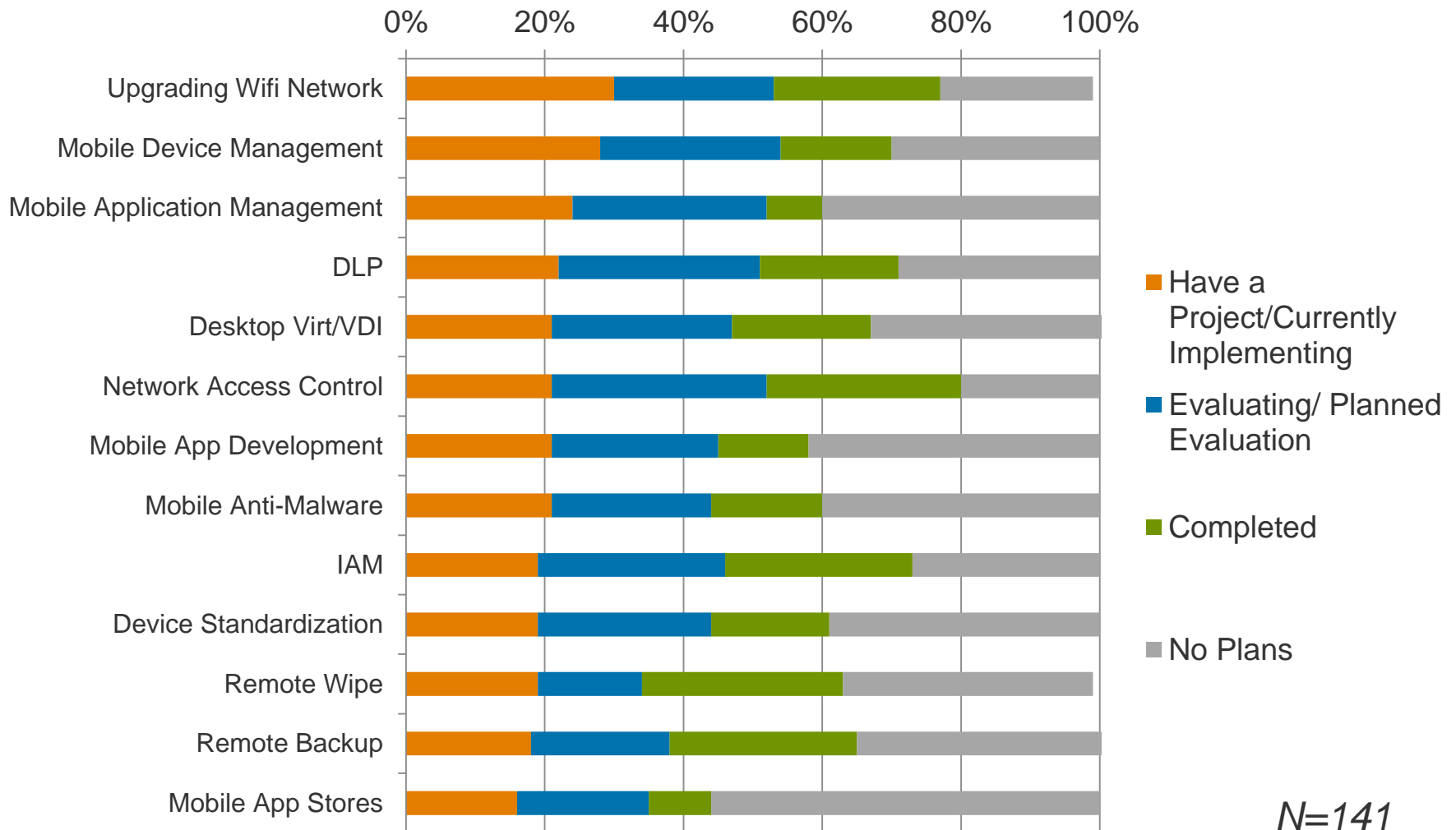


Security and Compliance: Key Concerns for BYOD

- Which are your top concerns regarding BYOD/Consumerization of IT ?(select up to three)

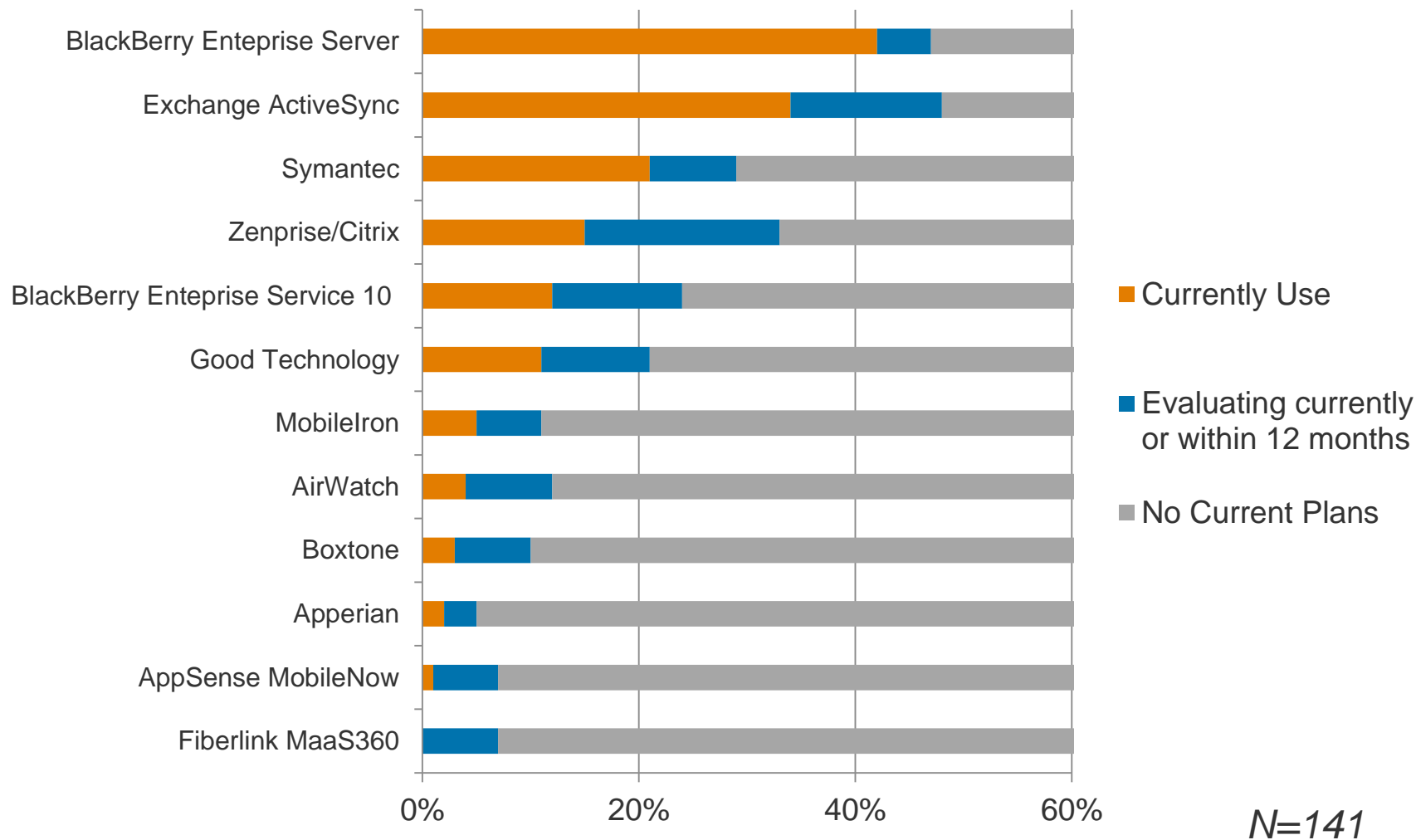


Wi-Fi Upgrades and MDM are Top Evaluation Projects for 2013



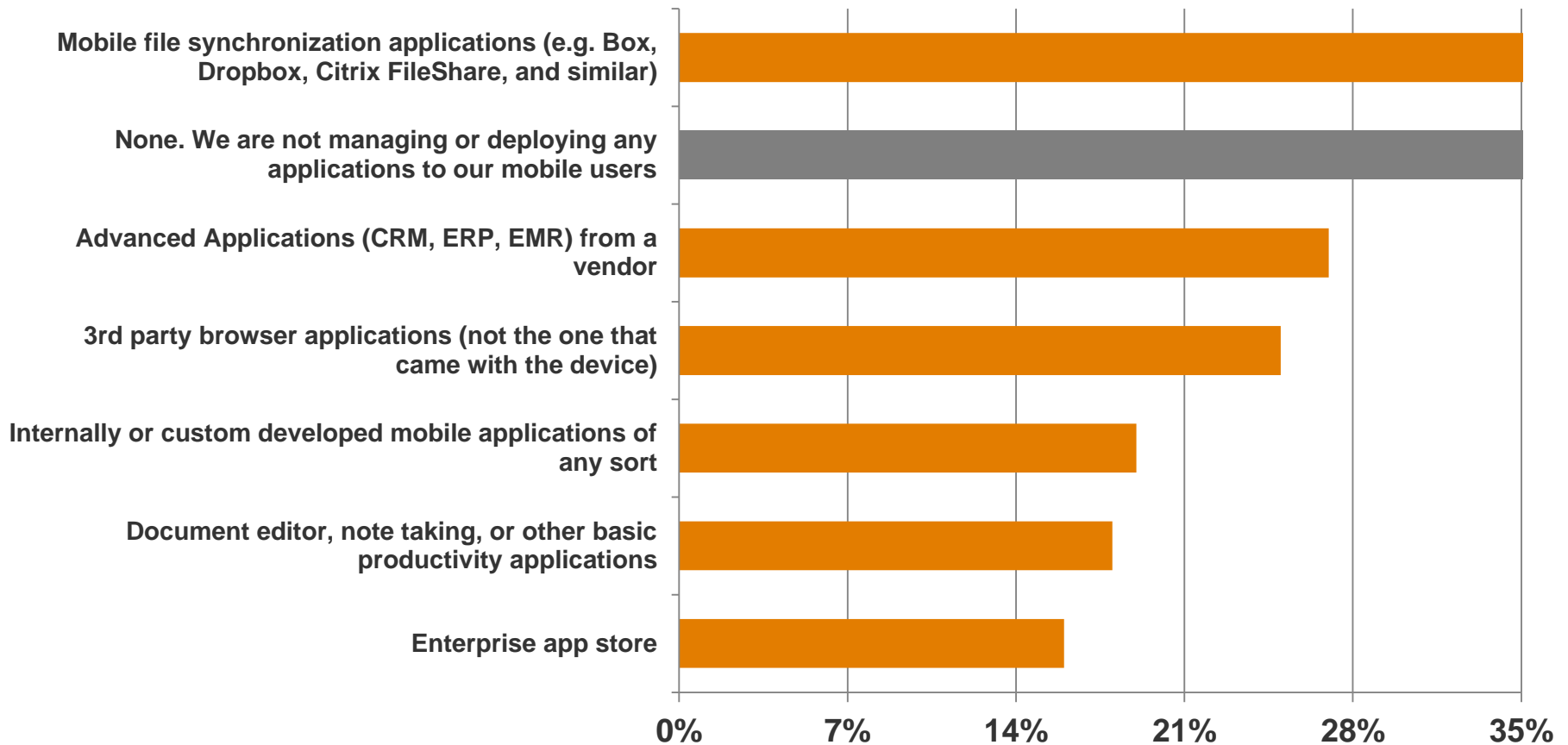
BES and ActiveSync Top Products in Use

No clear leader in current consideration



File Synchronization, Apps and 3rd Party apps top corporate mobile applications

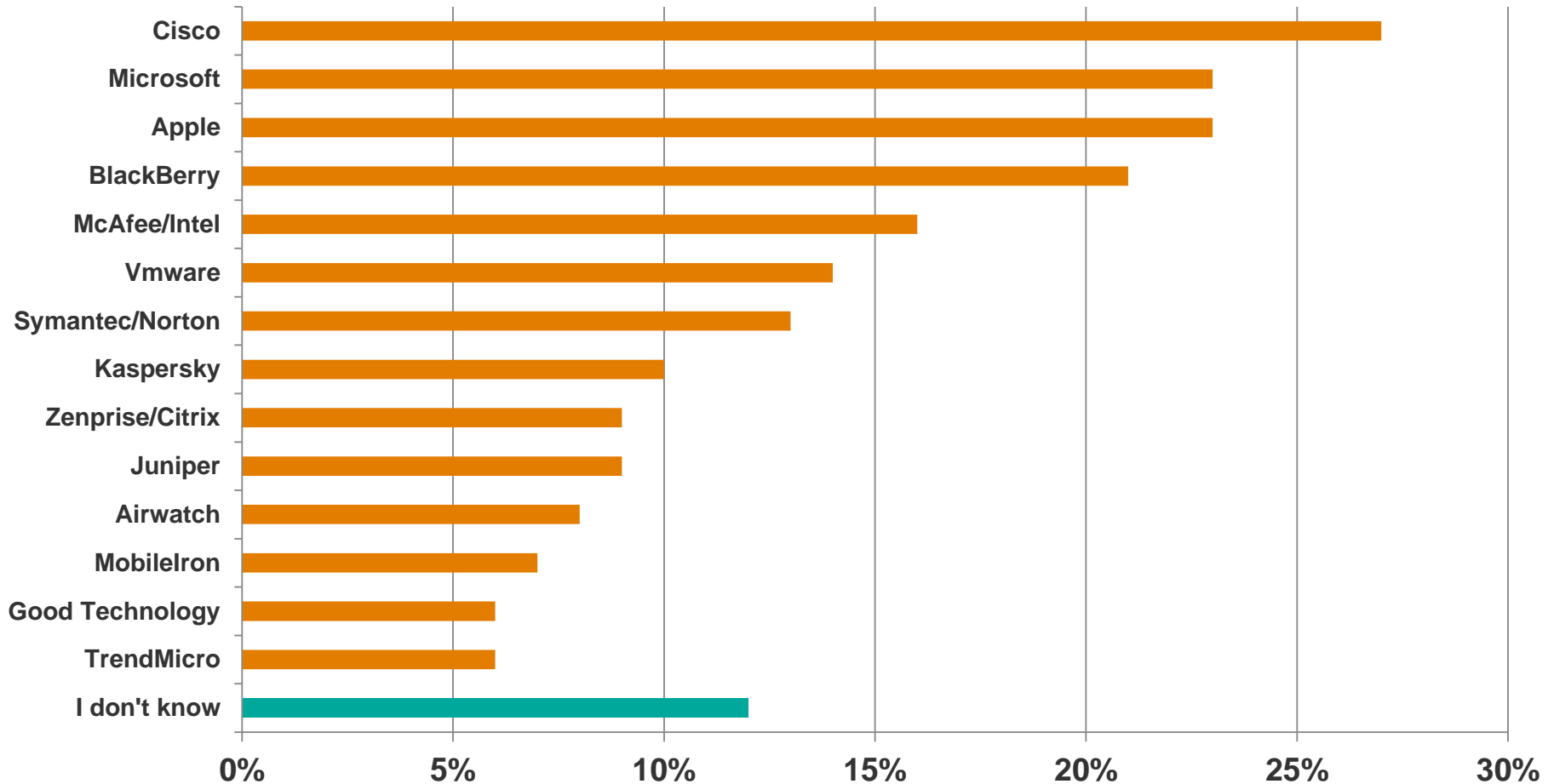
- Which of the following mobile applications is your organization managing or distributing to users? (Check all that apply)



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Top Mobile Security Vendors for BYOD

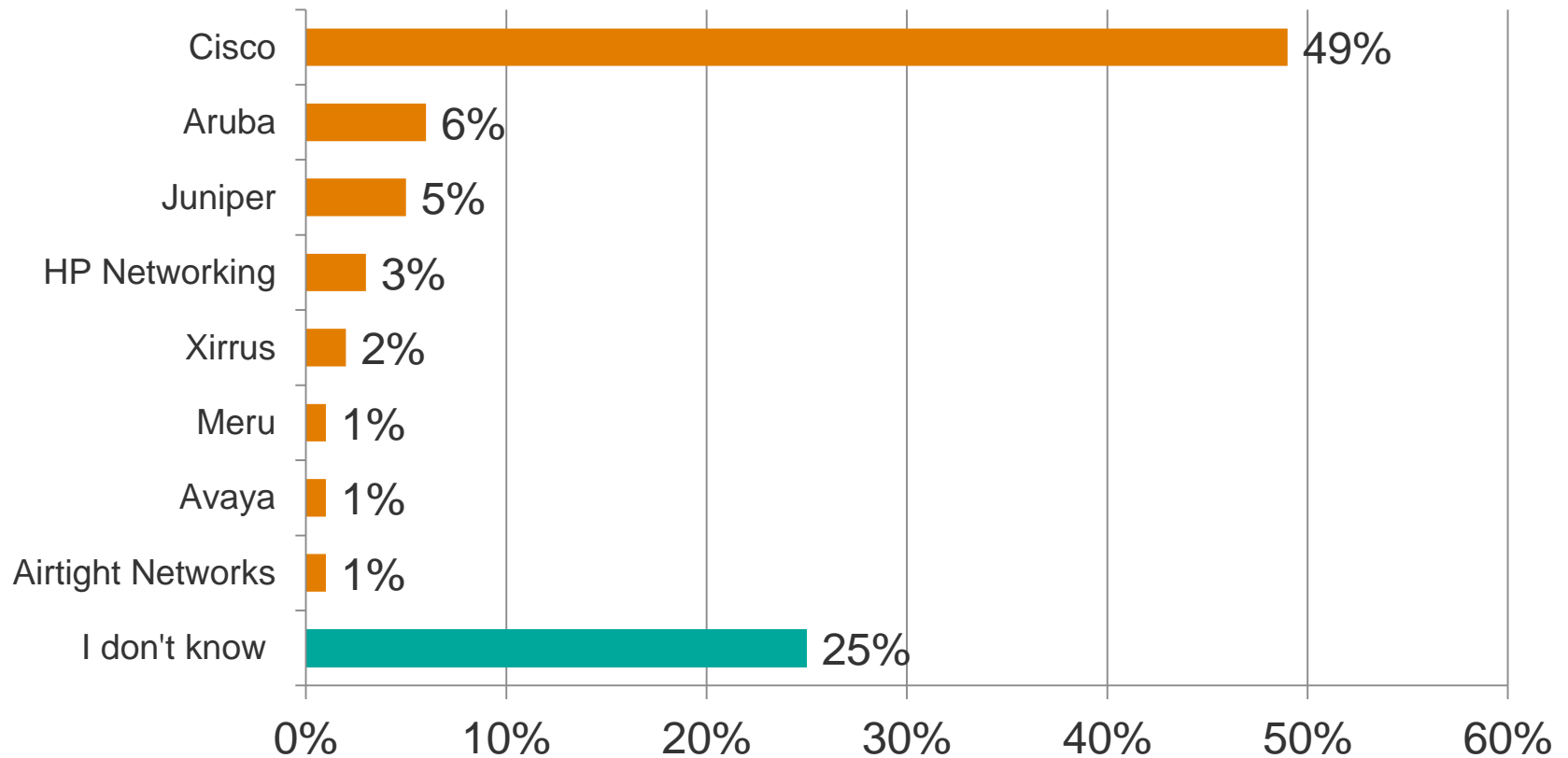
- Which mobile security vendors do you consider to be a good fit for your organization with regards to BYOD? (select up to 3)



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Top Wireless Vendor for BYOD

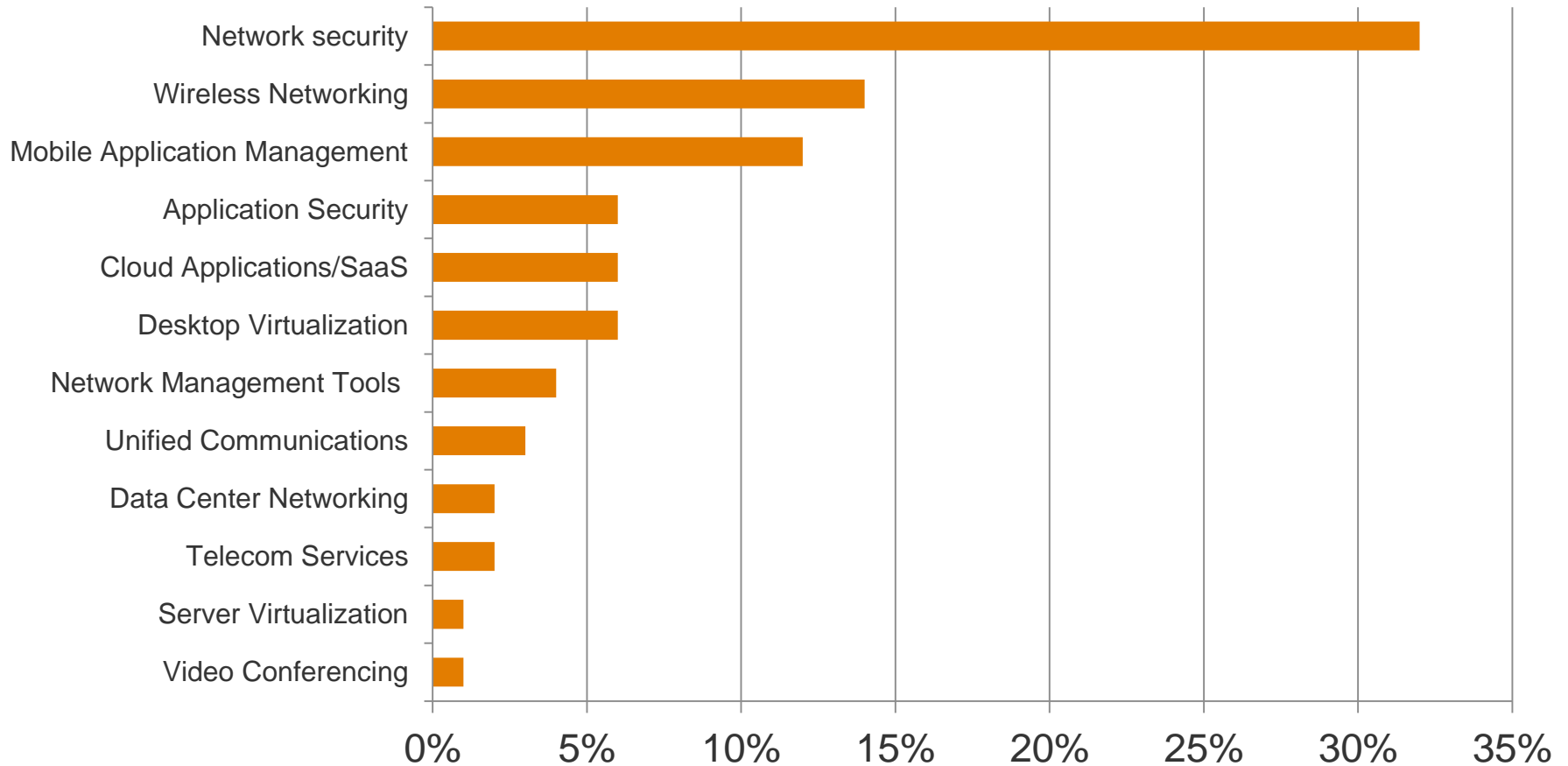
- Which wireless network vendor do you consider to be a good fit for your organization with regards to BYOD?



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BYOD Effects on IT Spending

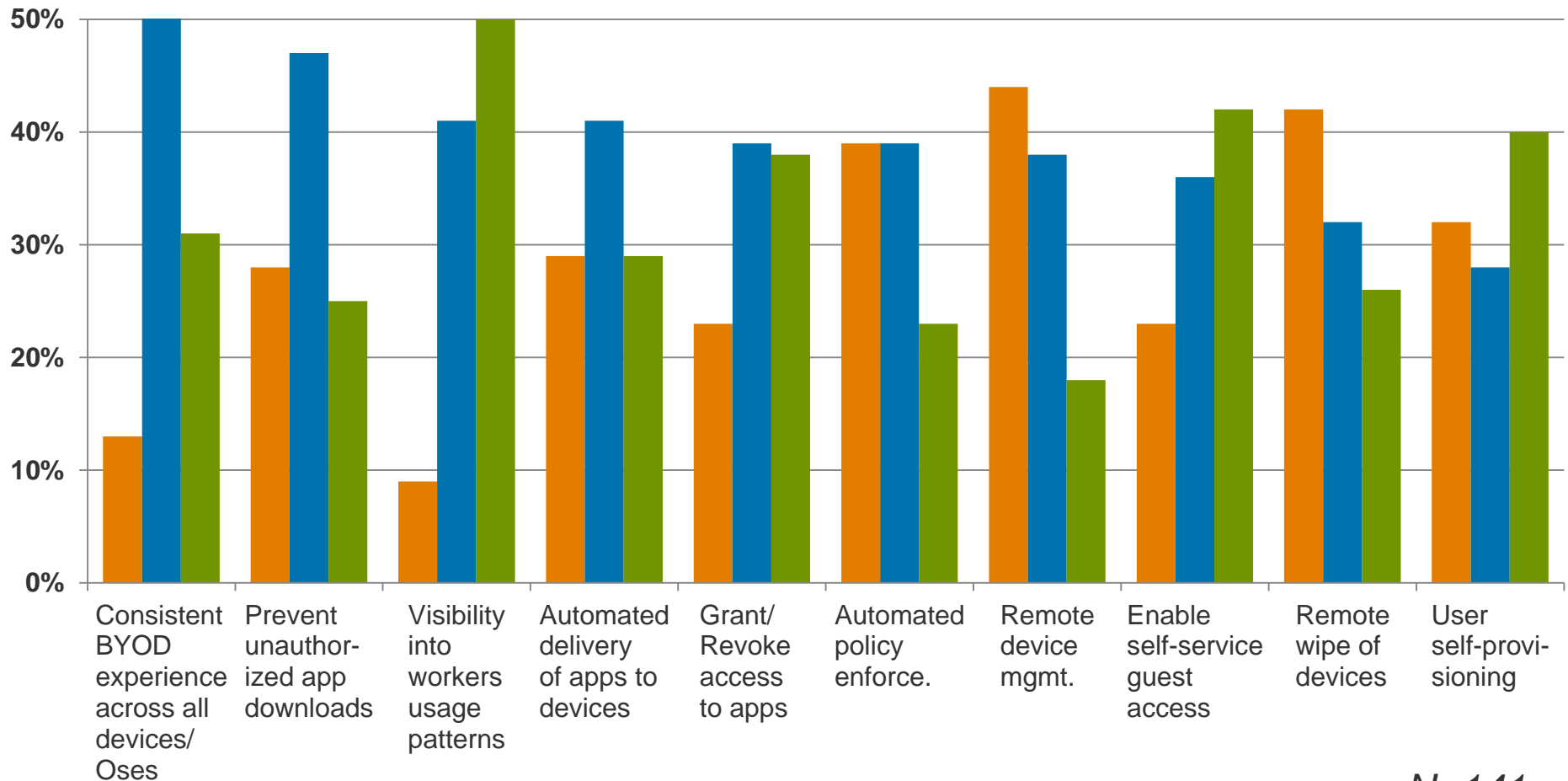
- Which areas of IT spending are likely to increase because of a BYOD project?



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More than half of respondents are still looking for consistent BYOD experience

■ Have the capability currently ■ Don't have this capability, but would like to ■ No interest

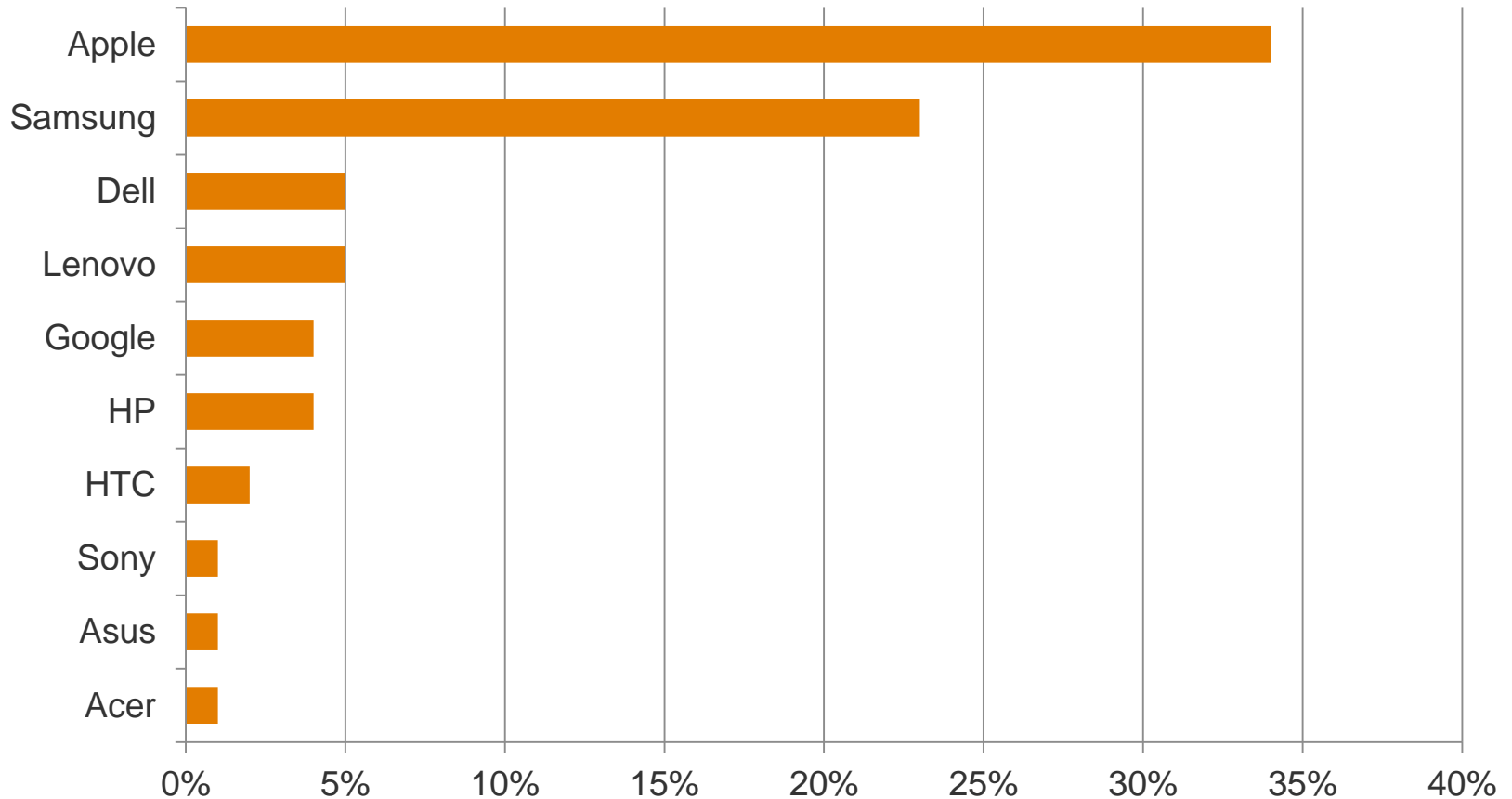


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Top BYOD Products from Endpoint Hardware Providers

Apple leads the pack

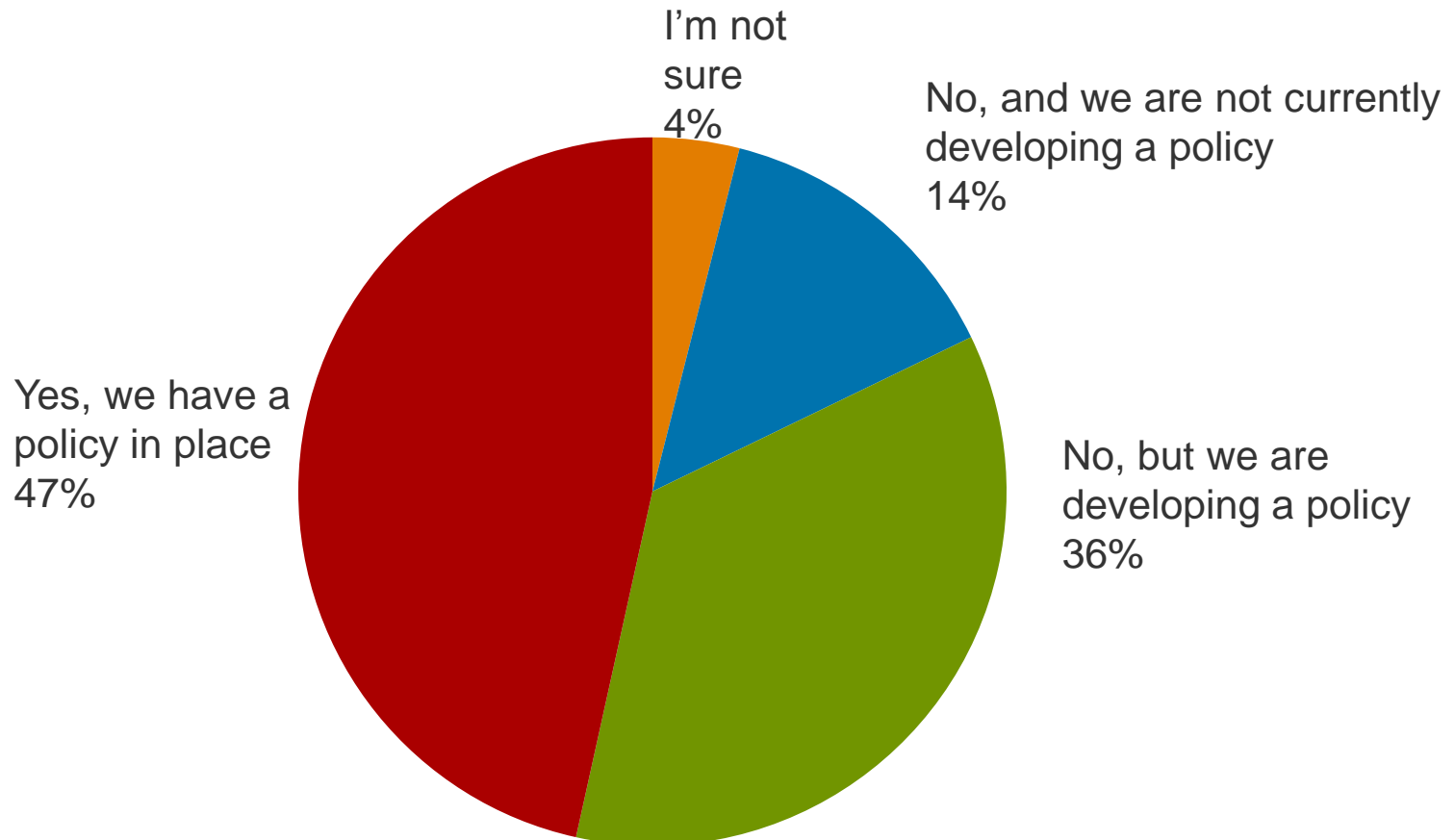
- Which endpoint hardware provider has the best products for BYOD from your perspective?



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Most organizations recognize the need for a usage policies for BYOD

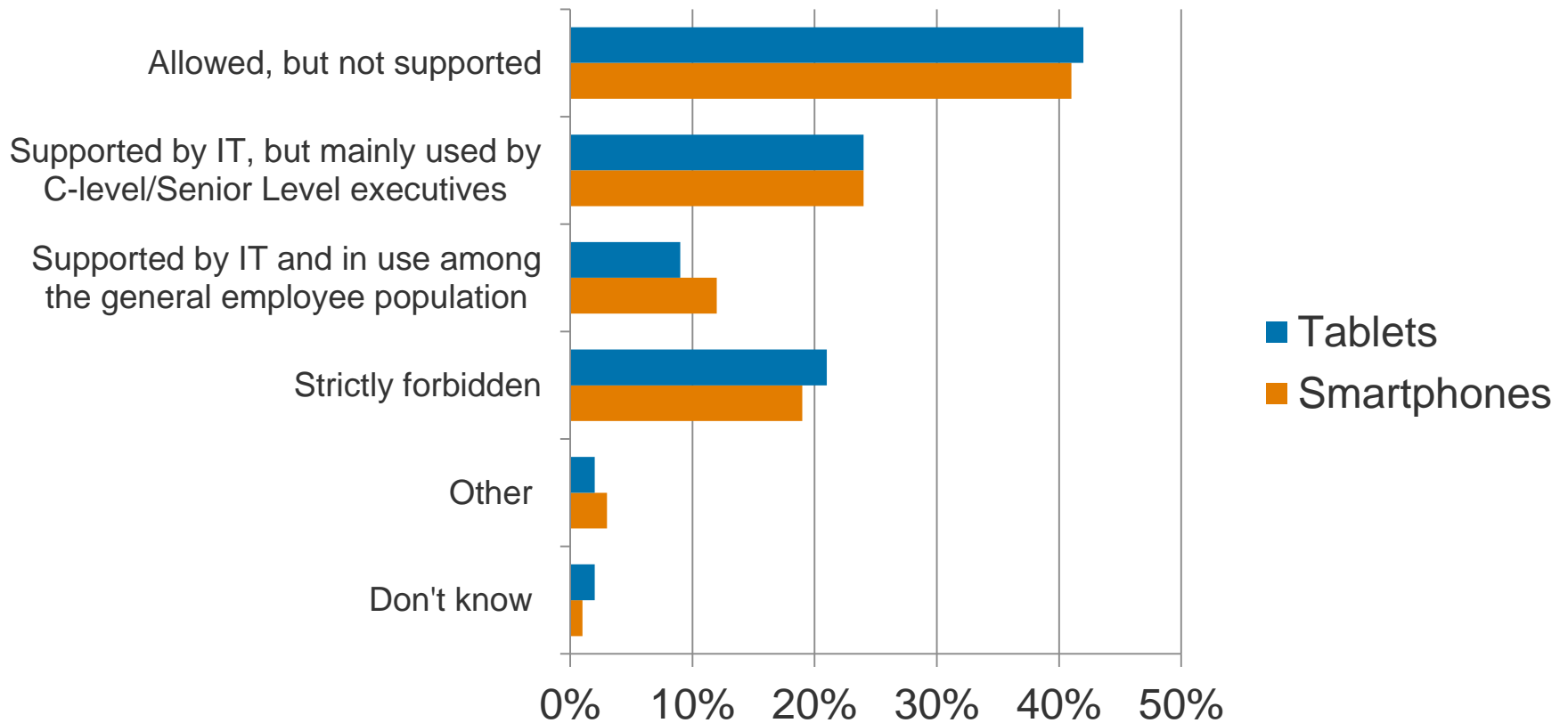
- *Does your organization have an official policy for the usage of personal devices at work?*



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Similar Positions on Smartphones and Tablets in the Enterprise

- *What is your organization's current position on employee-owned smartphones and tablets in the enterprise?*



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Status of Mobile Operating Systems in Your Organization

Mobile Operating Systems	Explicitly not allowed to connect to network	Allowed to connect to corporate network	We have standardized on this OS
Employee owned Apple iOS devices	36%	57%	6%
Apple iOS devices provided by your employer	21%	59%	20%
Employee owned Android devices	38%	57%	4%
Android devices provided by your employer	24%	65%	11%
Employee owned	48%	48%	3%
BlackBerry devices	36%	48%	16%
BB devices provided by your employer	18%	55%	26%
Employee owned Windows Phone	42%	52%	7%
Windows Phone devices provided by your employer	24%	60%	16% <i>N=141</i>