



INFORMATION TECHNOLOGY PRACTICE  
**IT LEADERSHIP EXCHANGE**

# **2012 Consumer Device Usage Survey Findings**

February 2012

## A FRAMEWORK FOR MEMBER CONVERSATIONS

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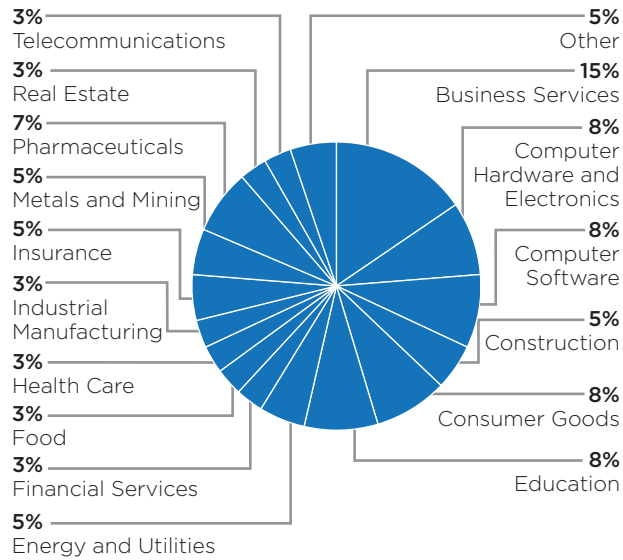
CIOs from 60 midsized organizations completed the survey in January 2012.

- The same survey was distributed to heads of Infrastructure at large enterprise organizations in March 2011.

## PARTICIPANT PROFILE

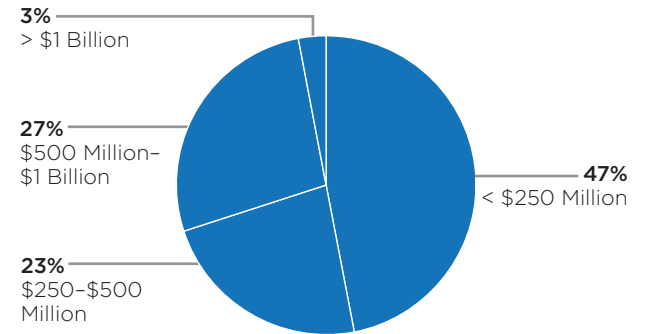
### Respondents by Industry

Percentage of Responding Organizations



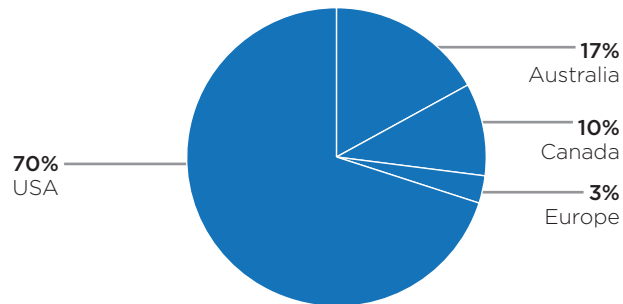
### Respondents by Annual Revenue

Percentage of Responding Organizations



### Respondents by Geographic Region

Percentage of Responding Organizations



n = 60.

Note: Totals may not equal 100% due to rounding.



Consumer technologies have changed demand patterns, challenging current enterprise provisioning models.

## CONSUMERIZATION DEFINED



### Consumerization

Consumerization is the introduction of easy-to-use personal devices and applications into the workplace—including personally owned or IT-provisioned devices, such as smartphones and tablet computers, and applications, such as Google Docs and Facebook.

### Challenges

1. How are technology demand drivers changing?
2. How do we identify new technology opportunities to maximize employee productivity?
3. How do we manage cost, complexity, and risk while delivering new capabilities?

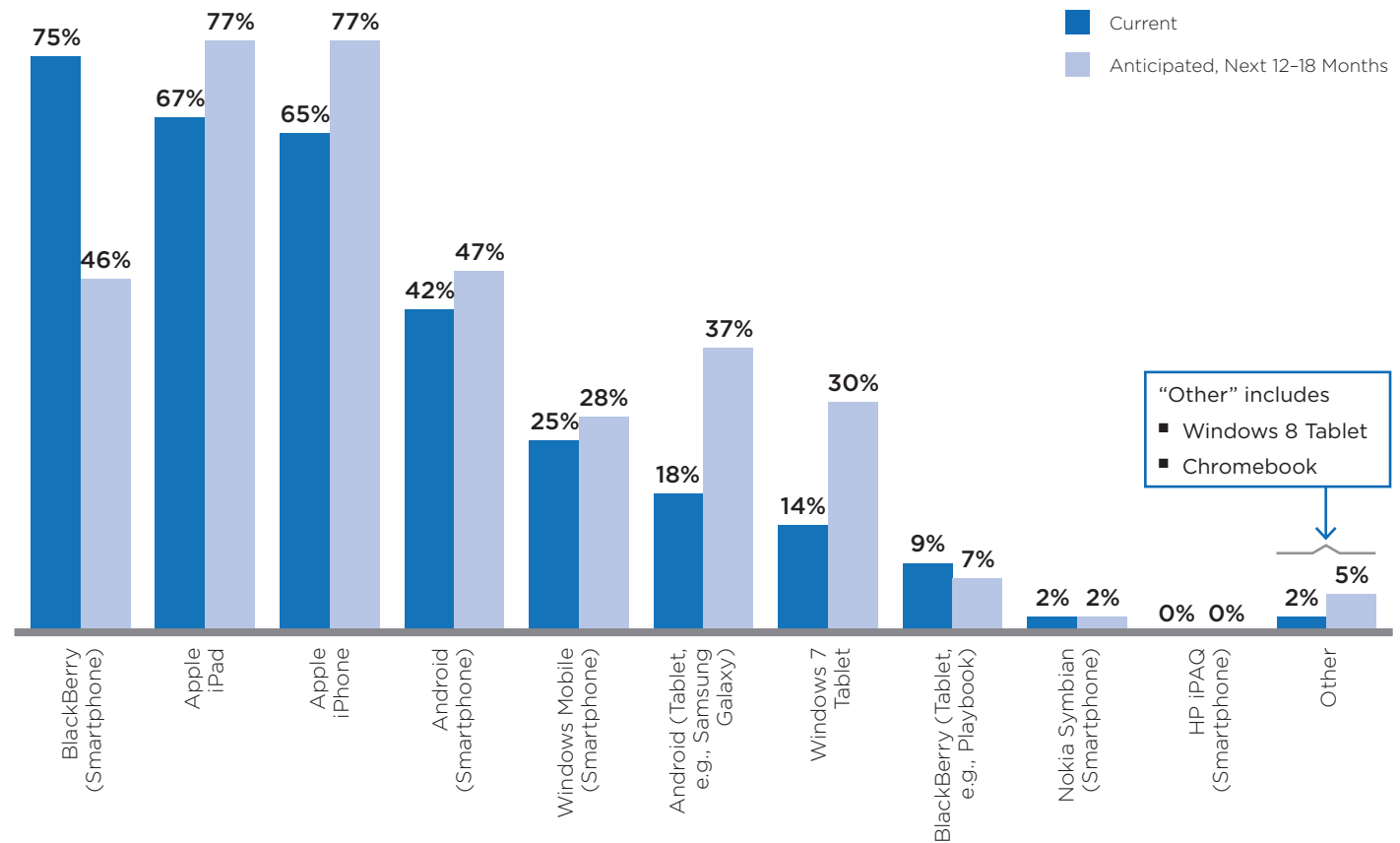


Over the next 12 to 18 months, CIOs anticipate provisioning a more diverse range of devices to end users.

- The number of organizations provisioning BlackBerry smartphones is anticipated to fall significantly.

## INCREASING HETEROGENEITY IN CORPORATE PROVISIONING

Device Types Provisioned by the IT Organization, Current and Anticipated Over Next 12-18 Months  
*Percentage of Organizations, Multiple Responses Allowed*

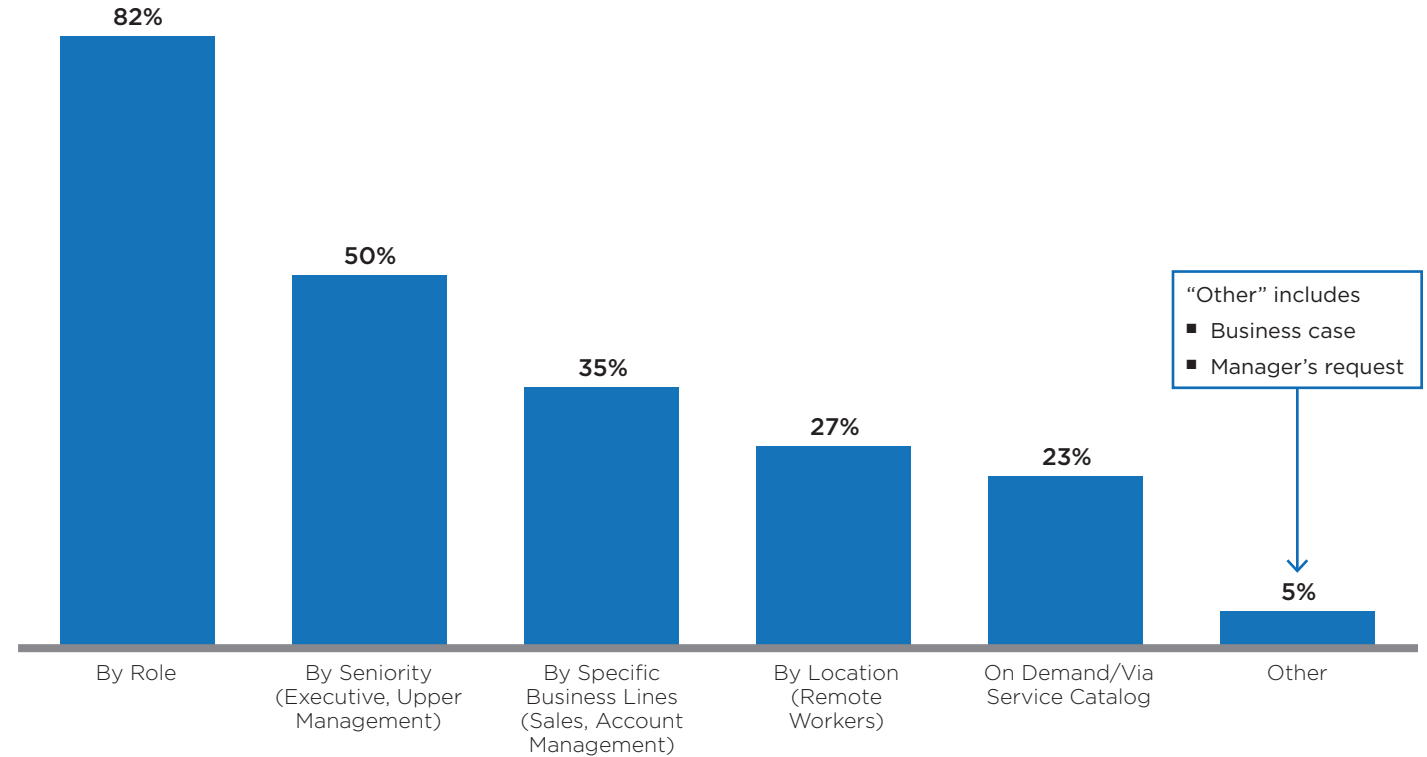


n = 57.

Eighty-two percent of mid-sized organizations provision devices by role, while one-half provision devices by seniority.

# PROVISIONED BY ROLE, FIRST AND FOREMOST

Corporate Provisioning Models for End-User Devices (Non-PC)  
Percentage of Organizations, Multiple Responses Allowed

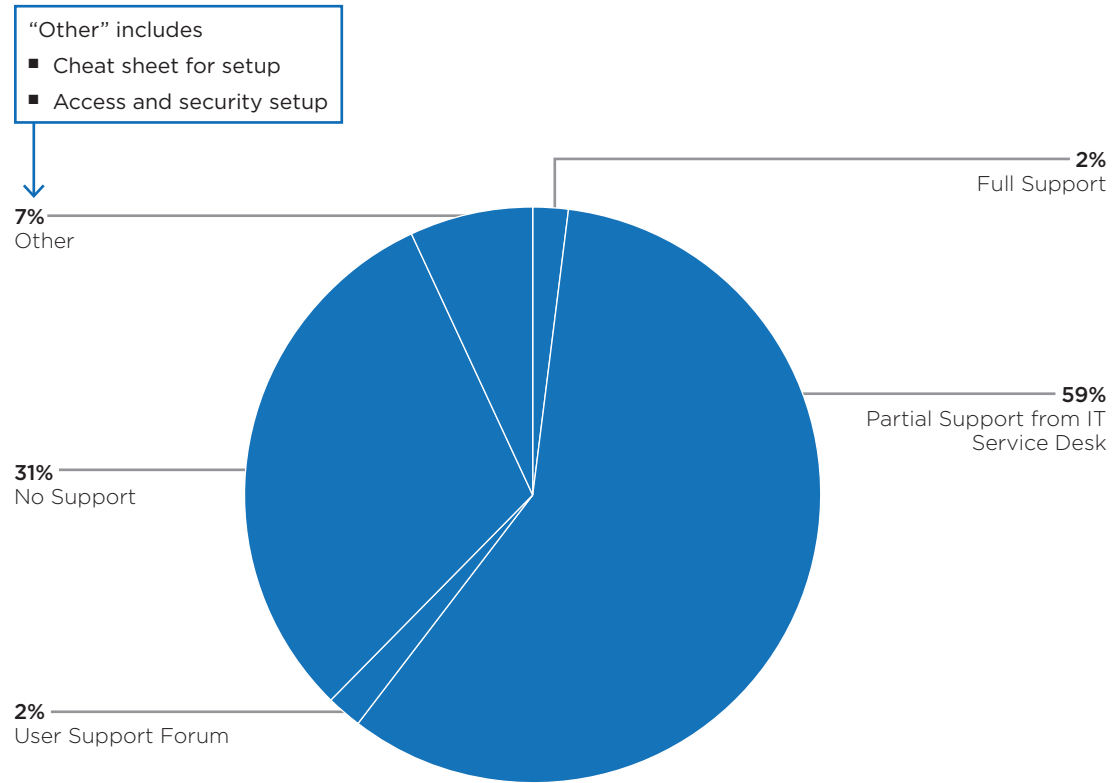


n = 60.

**Fifty-nine percent of IT groups provide limited support mechanisms for personally owned devices.**

# LIMITED SUPPORT FOR PERSONALLY OWNED DEVICES

IT Support Models for Personally Owned Devices  
*Percentage of Organizations*



n = 59.

Note: Totals may not equal 100% due to rounding.



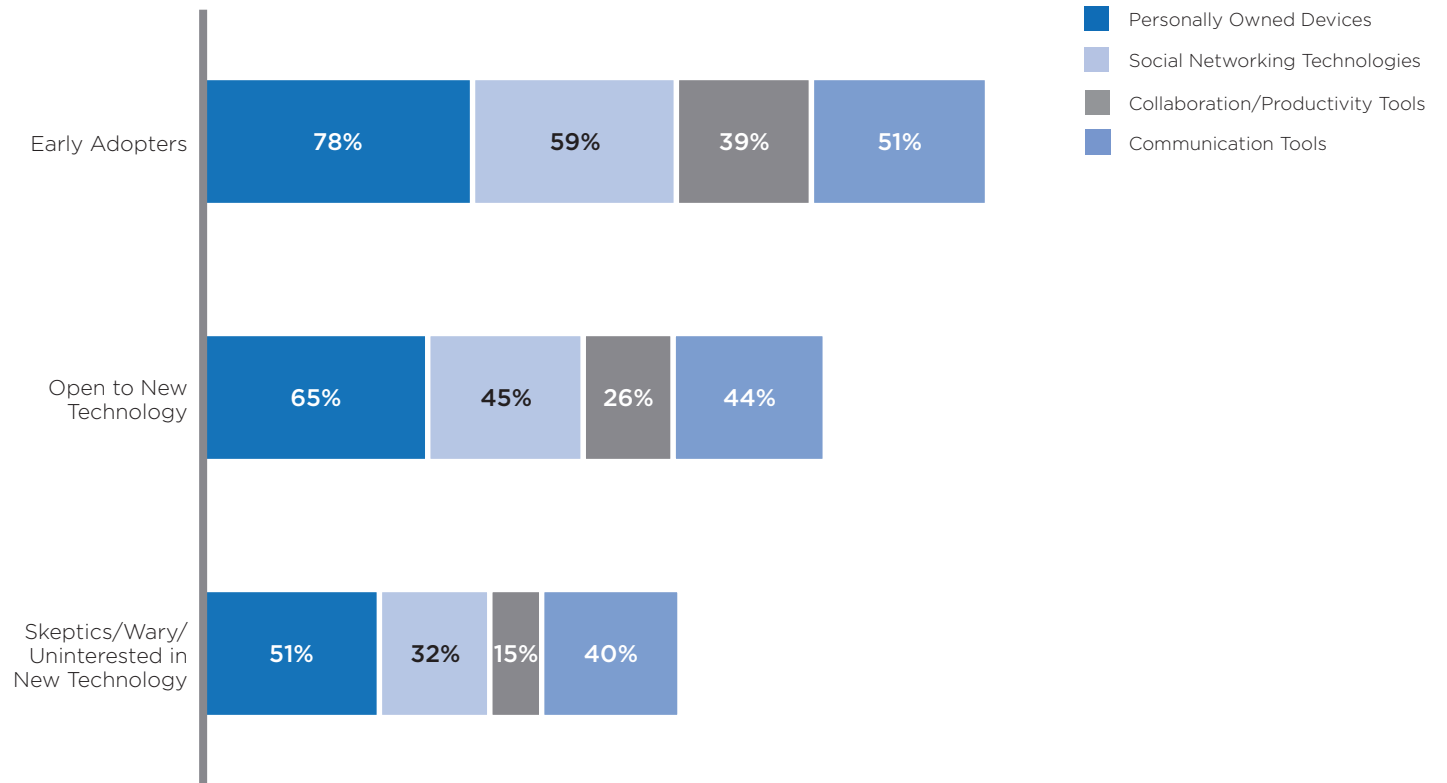
**Personally owned devices are only one of four consumer technology categories in widespread use by employees today.**

- Personally owned devices include personally owned iPhone, Android/Droid, or BlackBerry smartphone; personally owned laptop or home computer; and personally owned tablet.
- Social networking technologies include LinkedIn, Facebook/other social networking sites, and Twitter.
- Communication tools include Skype and other communication tools available on the Internet.
- Collaboration/productivity tools include Google Docs/Zoho, SlideShare, Flickr, Dropbox, or other storage/sharing resources; Blogger, WordPress, or other blogging software; and other productivity tools (e.g., Evernote, audio recording) available on the Internet.

## MAKING THEMSELVES AT HOME

### Consumer Technologies Used on a Regular Basis for Work

Percentage of Respondents, "Which Personal/Consumer Technologies Do You Use on a Regular Basis for Getting Work Done?"



n = 9,990, multiple responses allowed.

Source: IEC Employee Technology Value Survey, 2011.

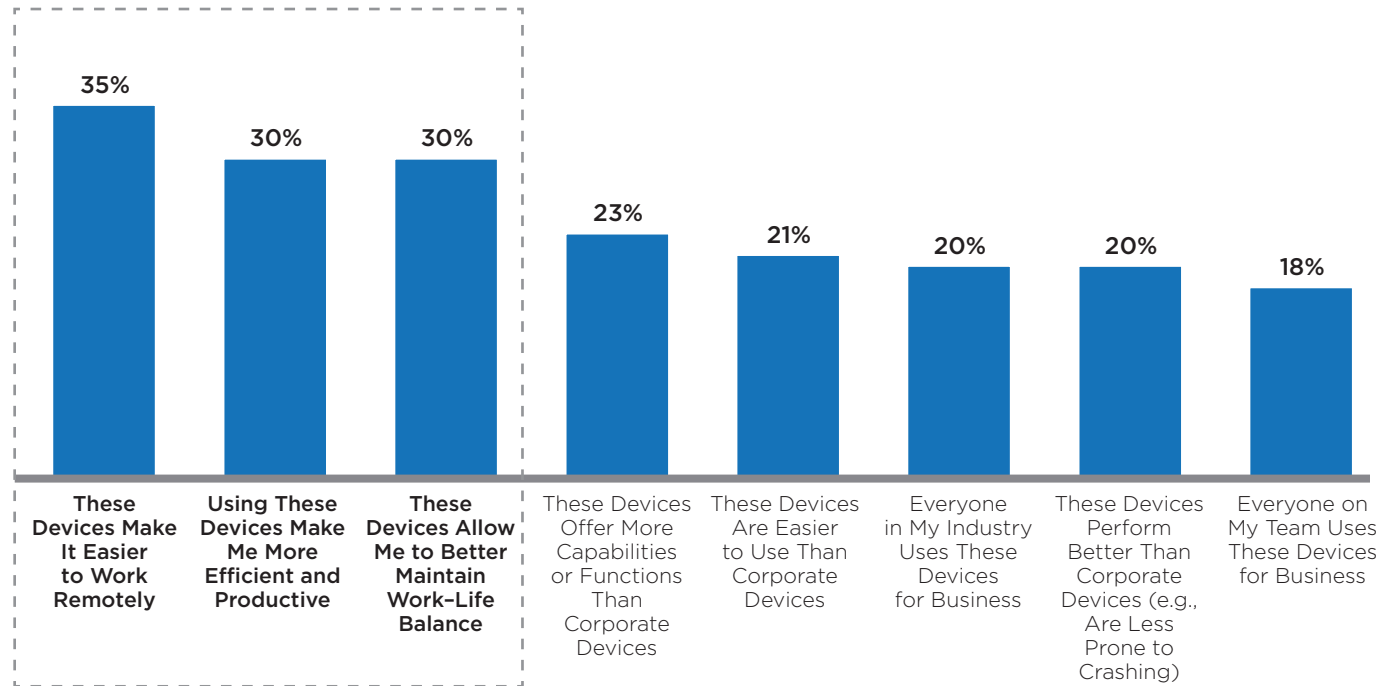


The dominant drivers behind the use or preference to use personally owned devices at work have less to do with the nature of the device and more with their ability to improve employees' workflow and work-life balance.

- Device capability and peer influence plays less of a role in consumerization-related behaviors than conventional wisdom would suggest.

## EASE OF WORKFLOW, NOT DEVICE

Drivers for Use or Preference to Use Personally Owned Devices for Work  
Percentage of Respondents



n = 9,990.

Source: IEC Employee Technology Value Survey, 2011.



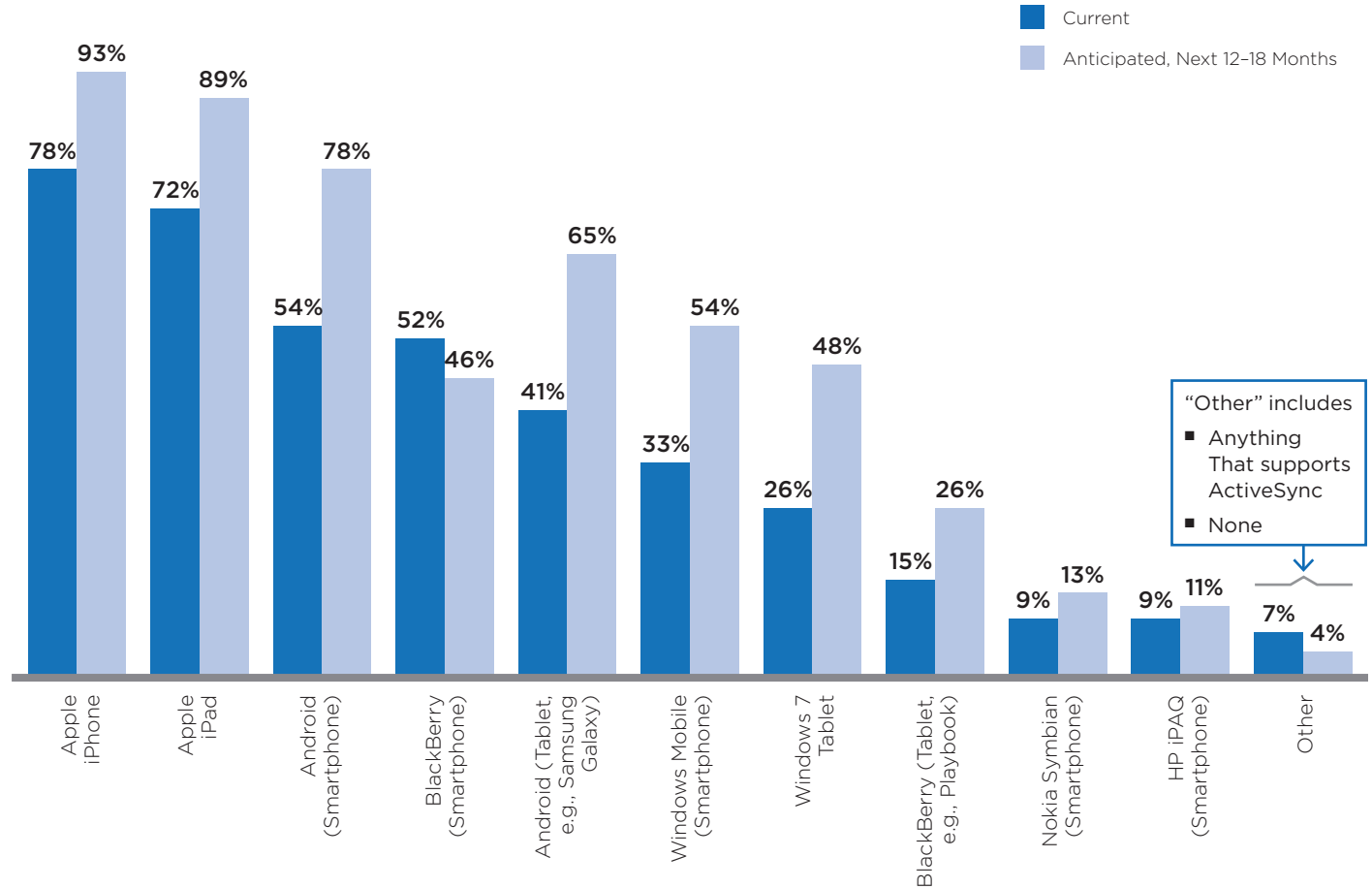
Across most device types, an increasing number of CIOs anticipate providing e-mail/calendaring support for personally owned devices.

- E-mail support for personally owned BlackBerry smartphones is expected to decrease, despite significant increases in support for other mobile devices.

## GROWING E-MAIL SUPPORT FOR PERSONAL DEVICES

Personally Owned Device Types for Which E-Mail/Calendaring Support is Provided, Current and Anticipated Over Next 12-18 Months

Percentage of Organizations, Multiple Responses Allowed



n = 46.

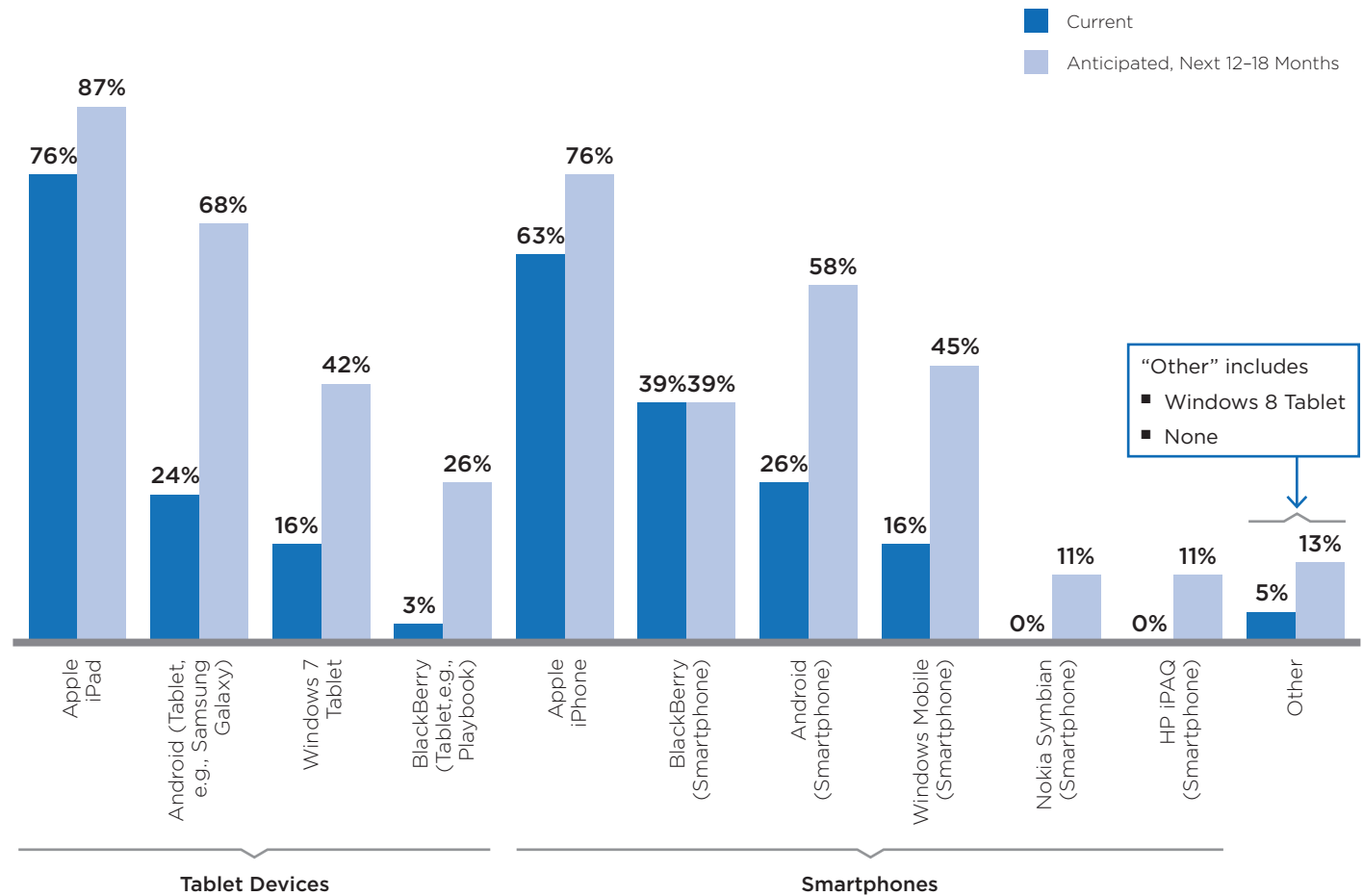
Over the next 12 to 18 months, the share of IT groups enabling access to corporate applications via personally owned tablets will markedly increase.

- Many anticipate enabling corporate applications on Android and Windows devices over the next 12 to 18 months.

## GROWING FOCUS ON TABLETS FOR CORPORATE APPLICATIONS ACCESS

Personally Owned Device Types for Which Access to Corporate Applications Is Enabled, Current and Anticipated Over Next 12-18 Months

Percentage of Organizations, Multiple Responses Allowed



n = 38.



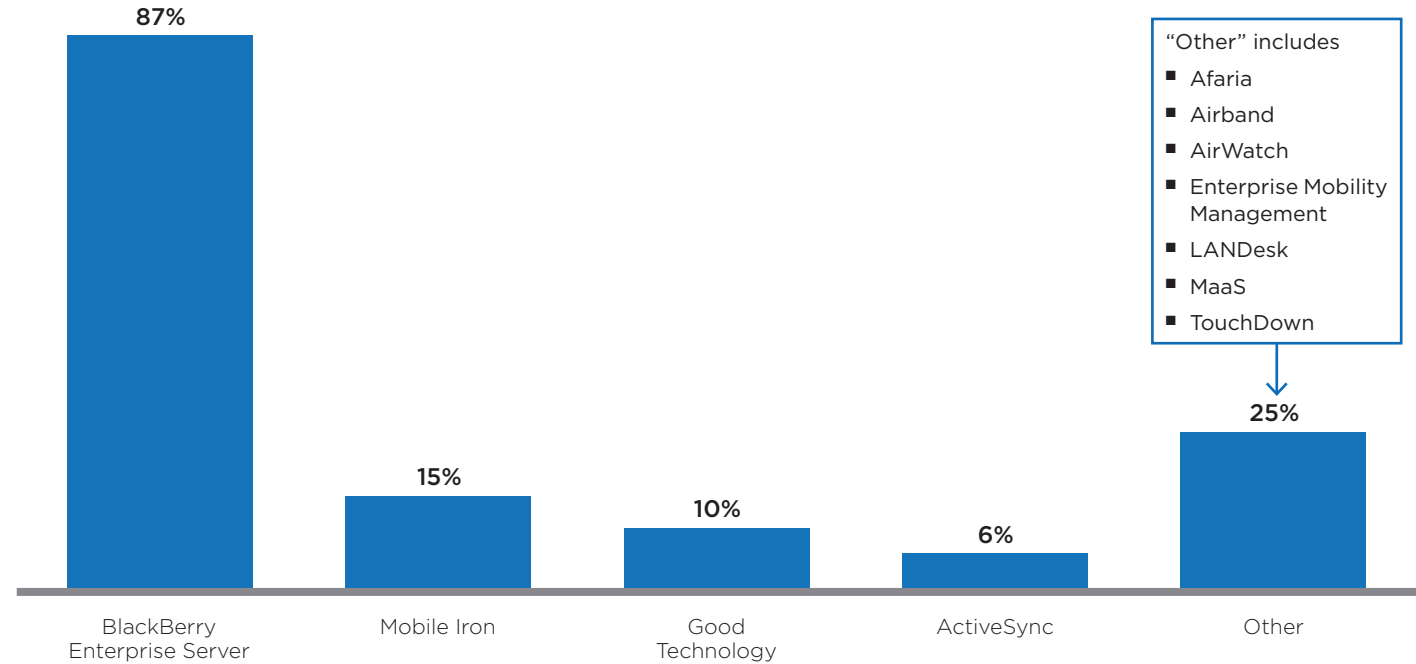
Eighty-seven percent of organizations rely on BlackBerry Enterprise Server for risk mitigation.

- Increased use of Apple, Android, and Windows devices will cause IT groups to consider alternate mobile device management (MDM) solutions in the future.

## MOBILE DEVICE MANAGEMENT SOLUTIONS IN PLACE

### MDM/Security Mitigation Solutions Used

Percentage of Organizations, Multiple Responses Allowed



n = 52.

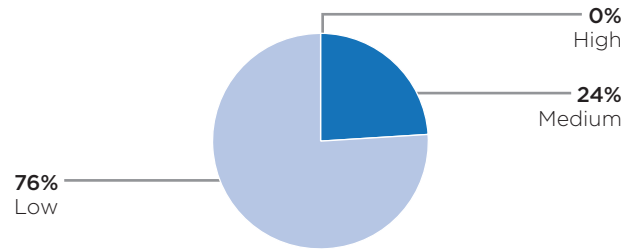
CIOs' security assessments reflect substantially greater concern for Apple, Android, and Windows smartphones than for BlackBerry.

- Only 13% of respondents view Windows Mobile smartphone as high risk, compared to 58% of respondents in March 2011.

## SECURITY PERCEPTIONS

Level of Security Risk Assessed by Device Type  
Percentage of Organizations

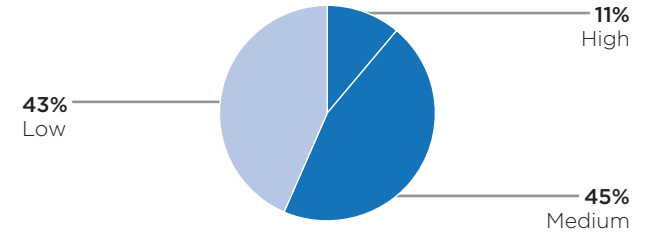
### BlackBerry Smartphone



n = 50.

Eighty-six percent of respondents have conducted a security assessment.

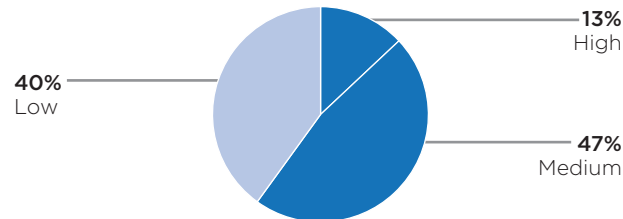
### Apple iPhone



n = 53.

Ninety percent of respondents have conducted a security assessment.

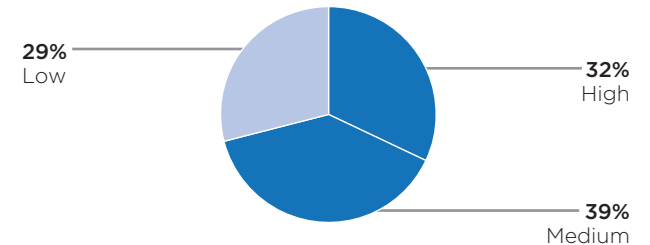
### Windows Mobile Smartphone



n = 30.

Fifty-three percent of respondents have conducted a security assessment.

### Android Smartphone



n = 41.

Seventy-one percent of respondents have conducted a security assessment.

Note: Totals may not equal 100% due to rounding.

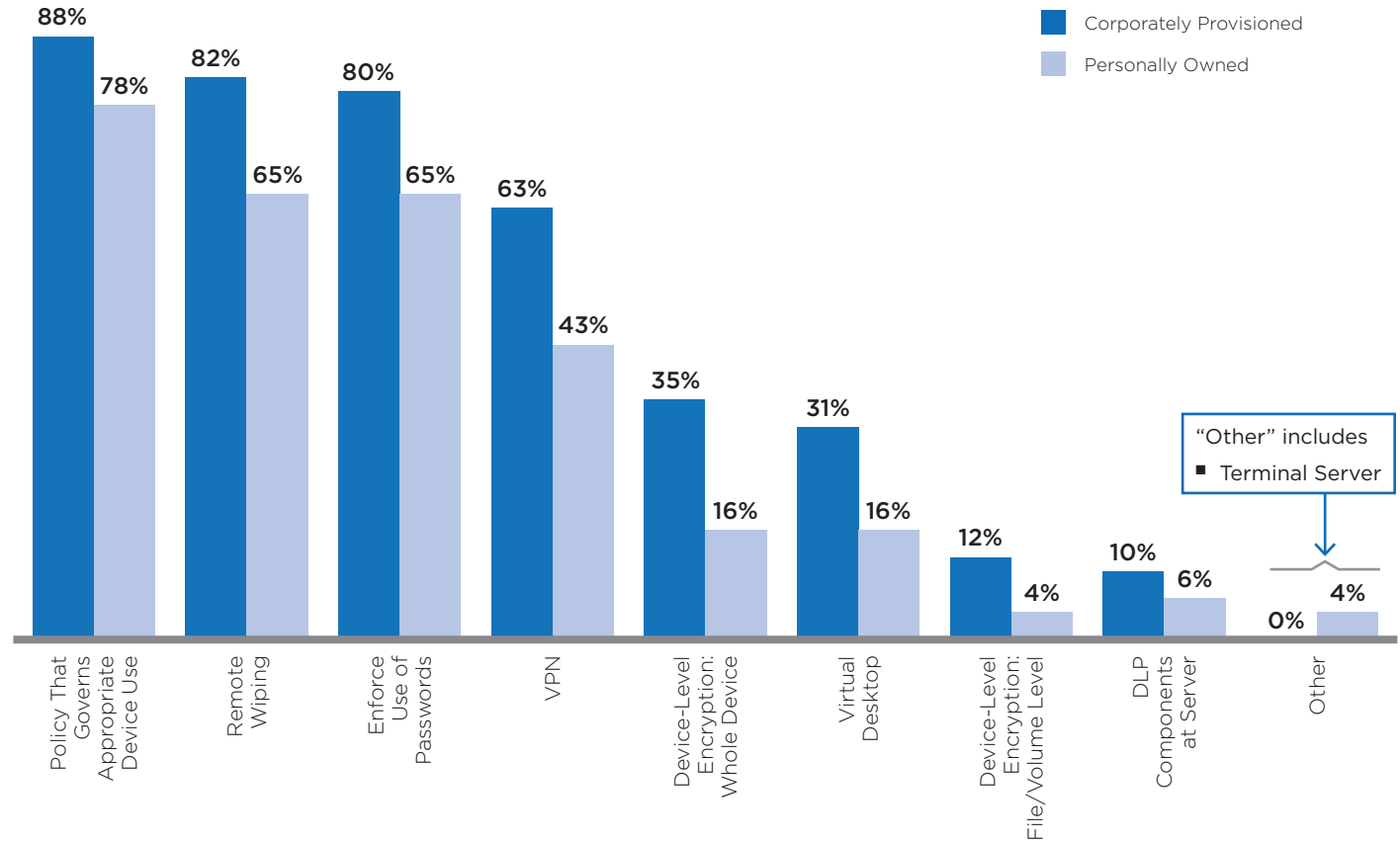


Most organizations apply basic security controls for both corporately provisioned and personally owned devices.

- With the exception of remote wiping, fewer than one-half of the organizations are applying more advanced security technologies as a risk mitigation measure for personally owned devices.

## RISK MITIGATION SOLUTIONS IN PLACE

Security Practices/Technologies in Place to Mitigate Risk Associated with End-User Devices  
*Percentage of Organizations, Multiple Responses Allowed*



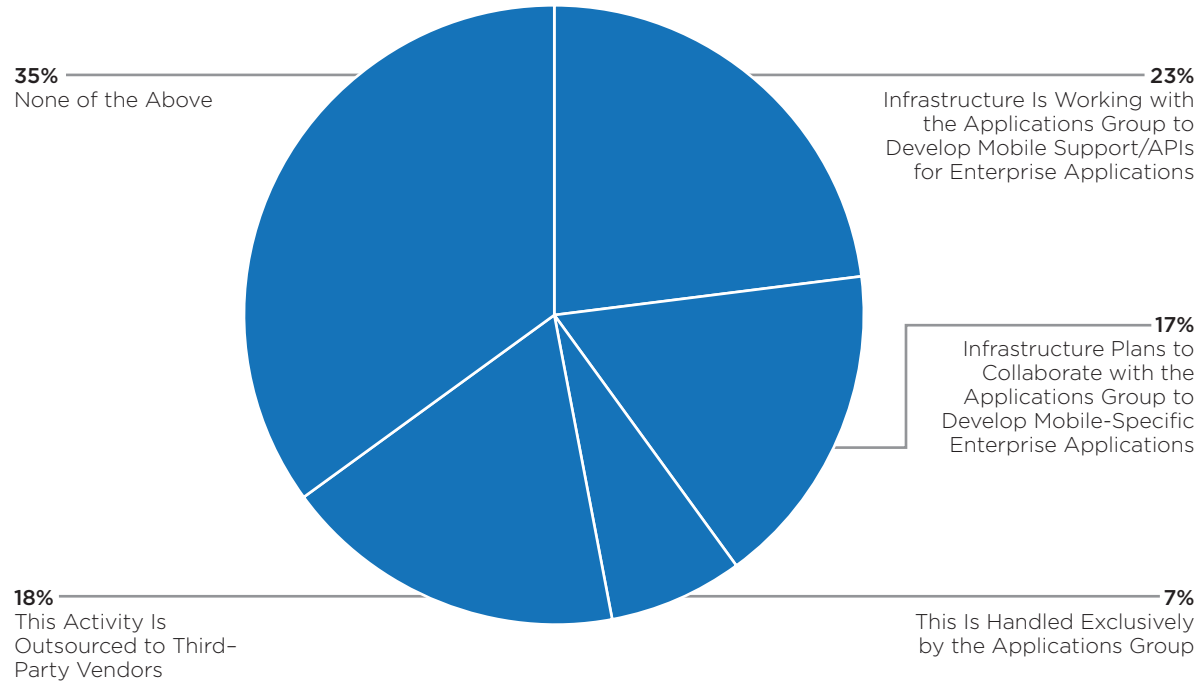
n = 49.

Only 40% of CIOs responded that infrastructure and applications groups are collaborating to support mobile applications development.

- By comparison, 72% of infrastructure and applications groups at large enterprise organizations were collaborating or planning to collaborate to support mobile applications development, as of March 2011.

## LACK OF CROSS-FUNCTIONAL COLLABORATION

Extent of Infrastructure/Applications Collaboration in Mobile Support  
*Percentage of Organizations*



n = 60.

SUPPORT FOR MIDSIZED ORGANIZATIONS

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