



CEB IT Leadership Exchange
For Midsized Companies

2013 Consumer Device Usage Survey Findings

February 2013

A FRAMEWORK FOR MEMBER CONVERSATIONS

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TABLE OF CONTENTS

Key Takeaways • 4

Participant Profile • 5

Consumerization and BYOD Defined • 6

Corporate Provisioning • 7

Provisioning Models • 8

Personally Owned Device (BYOD) Support • 9

E-Mail/Calendar Support • 10

Corporate Application Support • 11

Security Perceptions • 12

Risk Mitigation Solutions • 13

Mobile Device Management (MDM) Solutions • 14

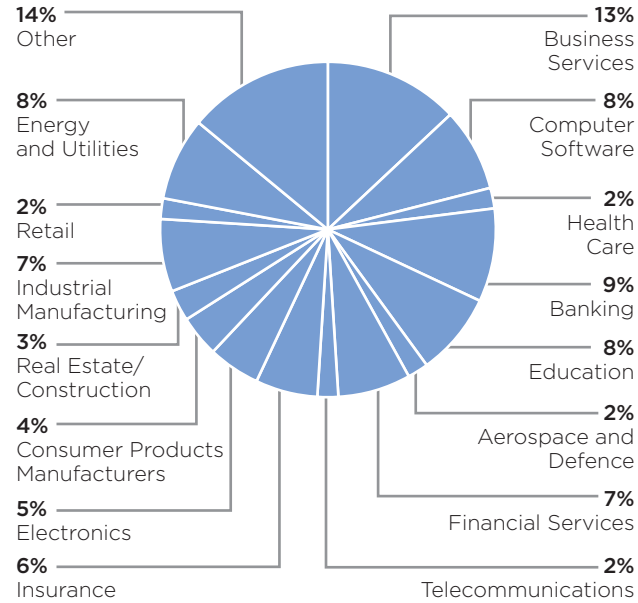
KEY TAKEAWAYS

- 1. Shift in Corporate Provisioning Toward Windows 8 and Android Devices:** Greater than 100% increase in provisioning Windows 8 and Android devices corresponds with a 50% drop in provisioning for BlackBerry smartphones over the next 12 to 18 months.
- 2. Higher ROI Threshold for Provisioned Devices:** Fifty-seven percent of organizations provision devices by business case or on manager request in February 2013, compared to 5% in February 2012.
- 3. Growing Focus on Tablets for Corporate Applications Access:** Over 50% of organizations will provide access to corporate applications on iPads, Android- and Windows 8-based tablets in the next 12 to 18 months.
- 4. Greatest Perceived Security Risk for Android Devices:** Seventy-one percent of organizations perceive Android devices to present medium to high risk.
- 5. BlackBerry Enterprise Server and ActiveSync Preferred Mobile Device Management (MDM) Solutions:** Fifty percent of midsized organizations use BlackBerry Enterprise Server whereas 34% use Microsoft ActiveSync as MDM solution.

IT professionals from 133 mid-sized organizations completed the survey in February 2013.

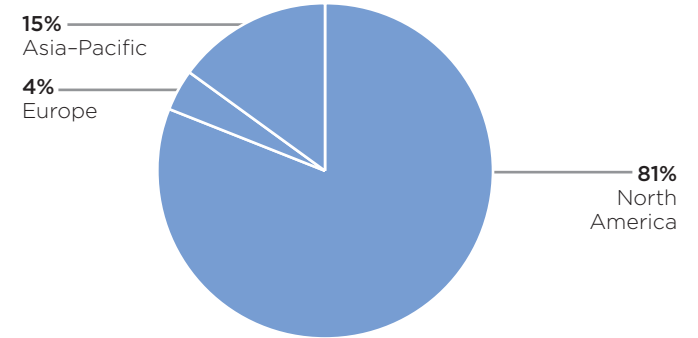
PARTICIPANT PROFILE

Respondents by Industry
Percentage of Responding Organizations

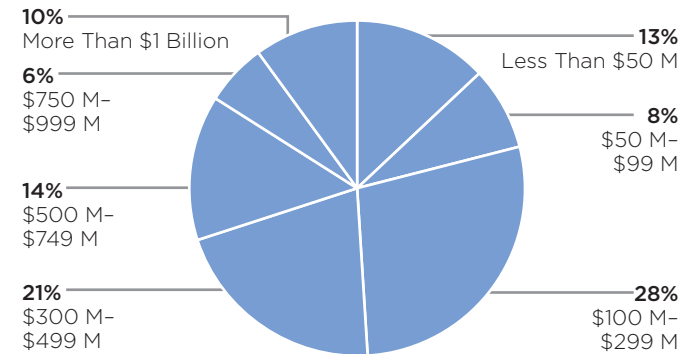


n = 133.

Respondents by Geographic Region
Percentage of Responding Organizations



Respondents by Revenue
Percentage of Responding Organizations





Consumer technologies continue to change demand patterns and challenge IT organizations to update enterprise provisioning and support models.

CONSUMERIZATION AND BYOD 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.

BYOD

Bring your own device (BYOD) is a program where enterprises allow employees to use personal devices, including smartphones, tablets, and laptops, in the workplace.

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?

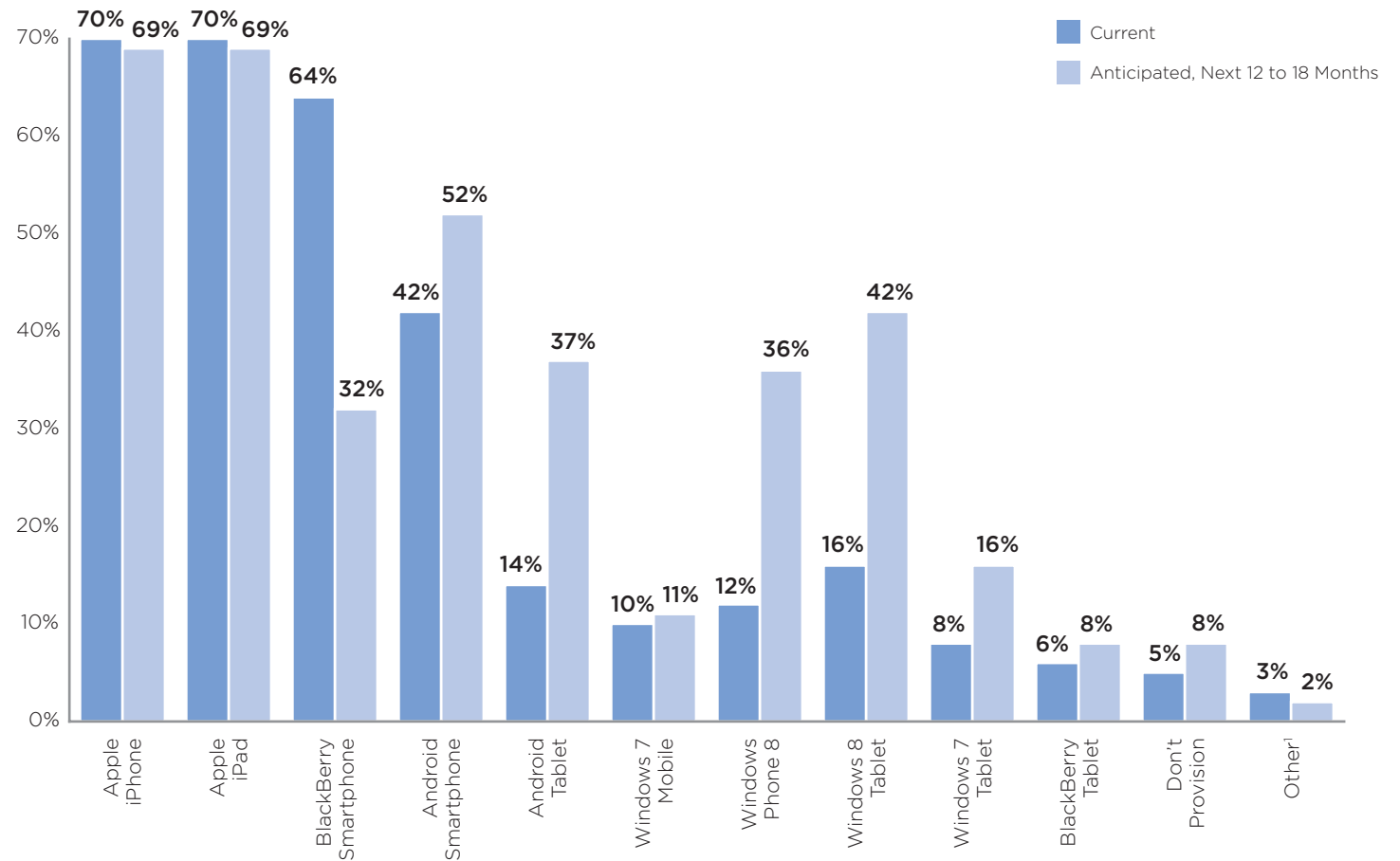


Over the next 12 to 18 months, IT organizations anticipate increased provisioning of Android- and Windows 8-based devices.

- The percentage of organizations provisioning Windows 8- and Android-based devices corresponds to a drop in provisioning for BlackBerry smartphones.

SHIFT IN CORPORATE PROVISIONING

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



n = 132.

¹ "Other" includes Pre-Windows 7 Devices.



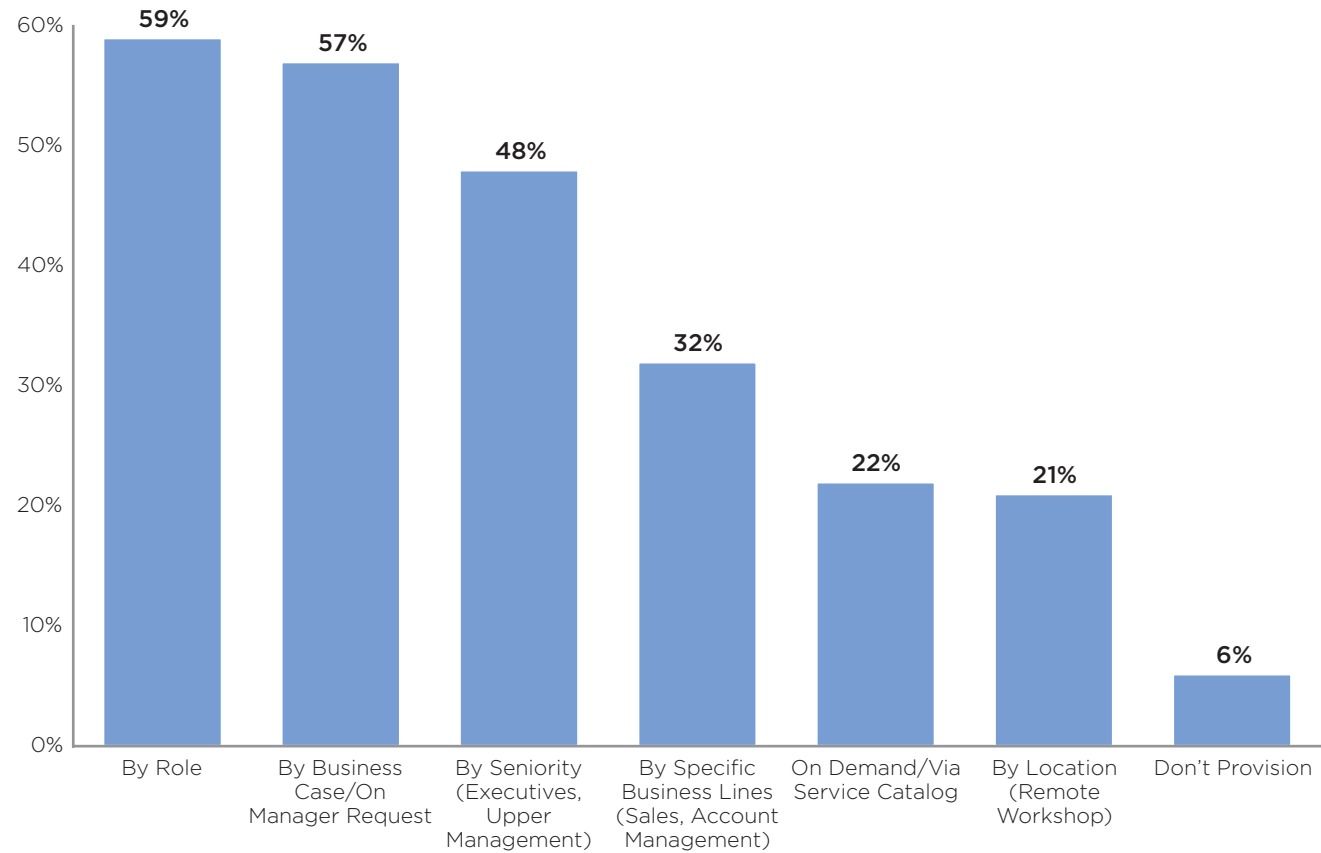
Role-based provisioning remains the most common corporate provisioning model.

- Fifty-seven percent of organizations provision devices by business case or on manager request in February 2013 as compared to 5% in February 2012.

HIGHER ROI THRESHOLD FOR PROVISIONED DEVICES

Corporate Provisioning Models for End-User Devices

Percentage of Organizations, Multiple Responses Allowed

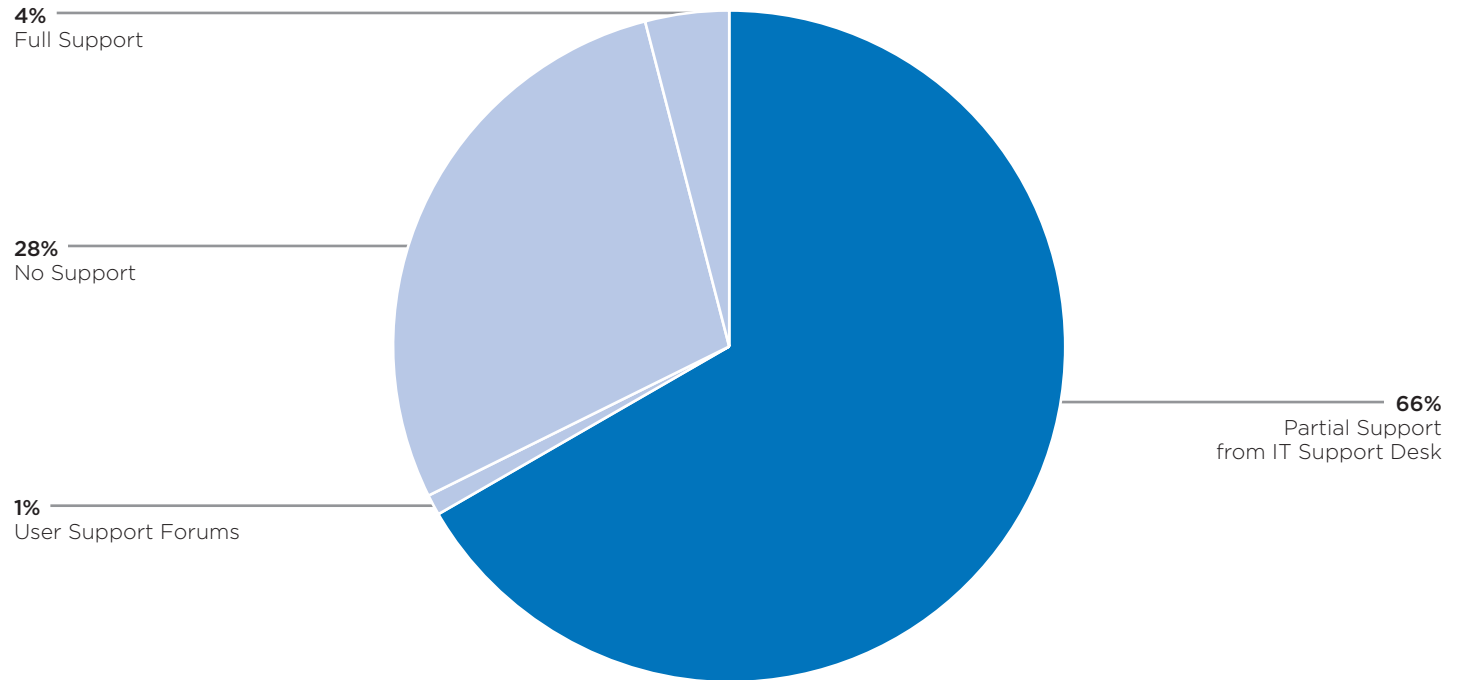


n = 132.

Sixty-six percent of IT organizations 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 = 132.



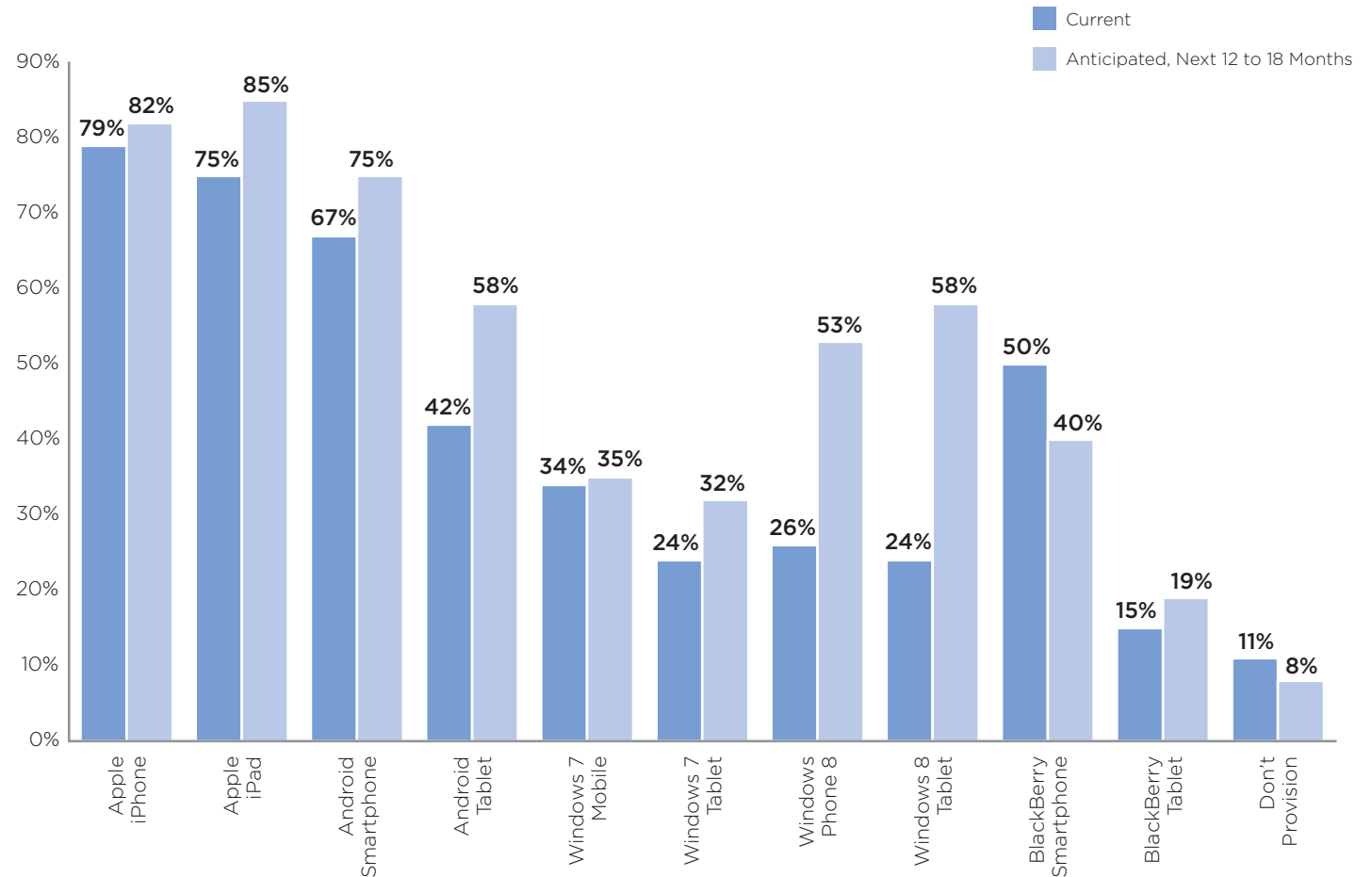
More than 50% of organizations anticipate supporting e-mail/calendaring for Windows 8-based devices.

- Twenty percent fewer organizations anticipate supporting e-mail/calendaring BlackBerry smartphones in 12-18 months.

GROWING SUPPORT FOR WINDOWS 8

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

Percentage of Organizations, Multiple Responses Allowed



n = 131.



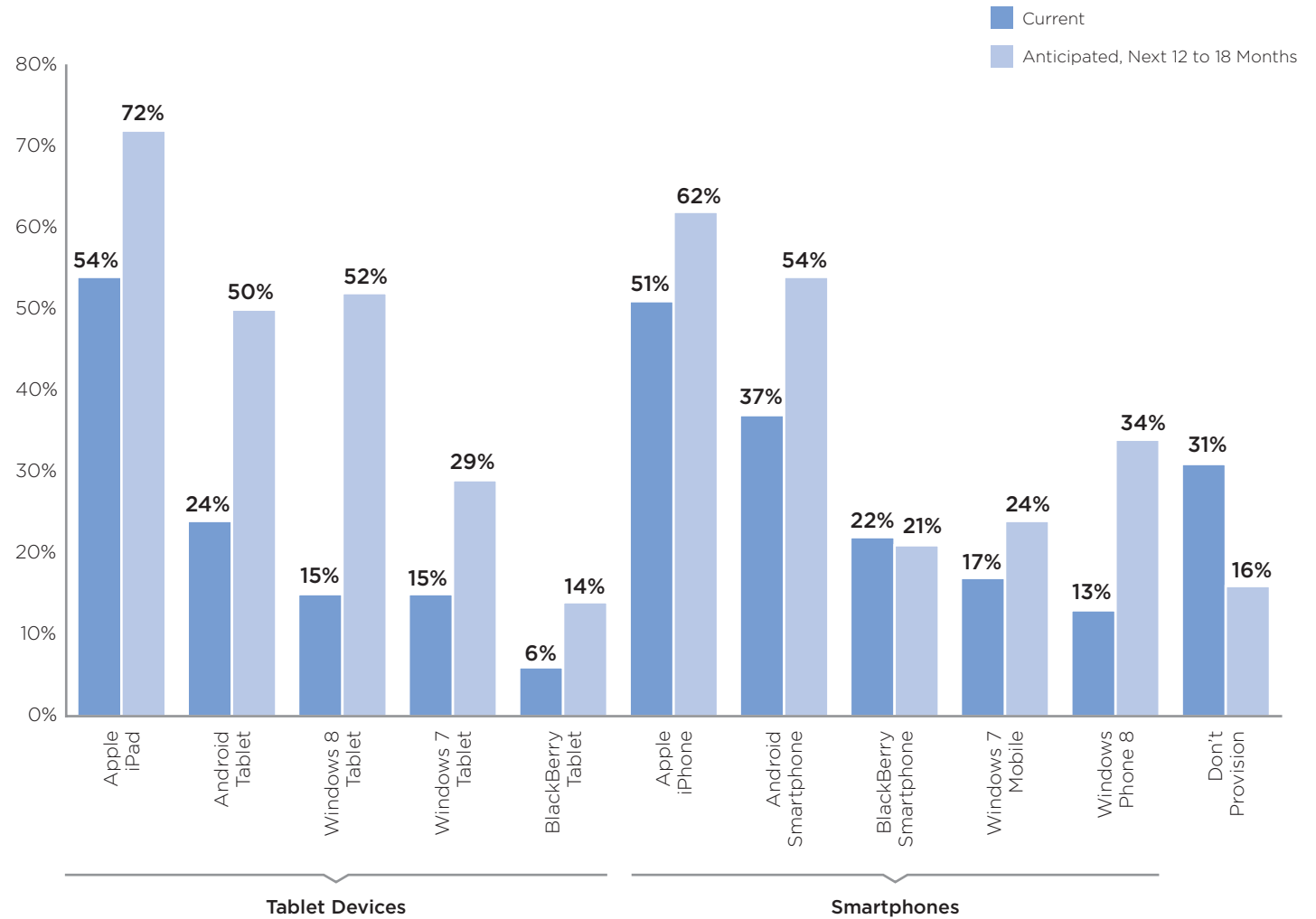
Over 50% of organizations will provide access to corporate applications on iPads, Android- and Windows 8-based tablets in the next 12 to 18 months.

- Companies offer limited smartphone access to corporate applications compared to e-mail/ calendaring across all platforms.

GROWING FOCUS ON TABLETS FOR CORPORATE APPLICATIONS

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

Percentage of Organizations, Multiple Responses Allowed



n = 125.

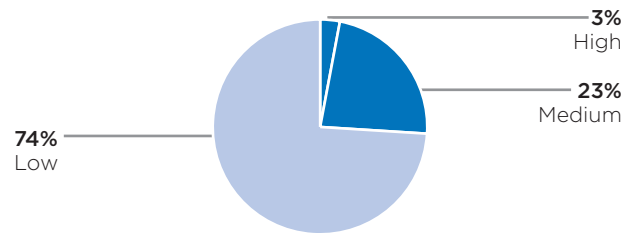
Seventy-one percent of organizations perceive Android devices to present medium to high risk.

- Like in 2012, the fewest security assessments were conducted for Windows devices.

GREATEST PERCEIVED SECURITY RISK FOR ANDROID DEVICES

Level of Security Risk Assessed by Device Types
Percentage of Organizations

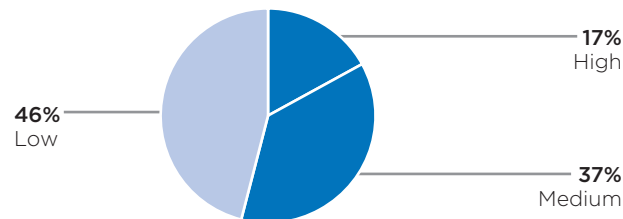
BlackBerry Smartphone



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

n = 97.

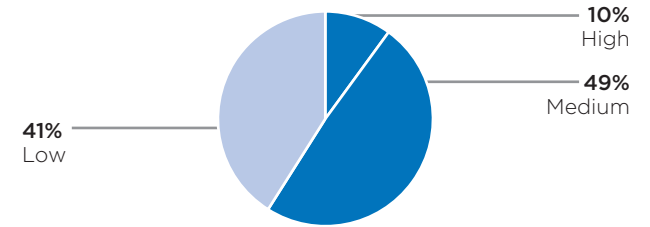
Windows Mobile Smartphone



Sixty percent of respondents have conducted a security assessment.

n = 78.

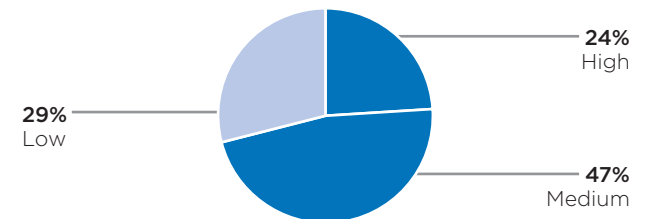
Apple iPhone



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

n = 111.

Android Smartphone



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

n = 103.

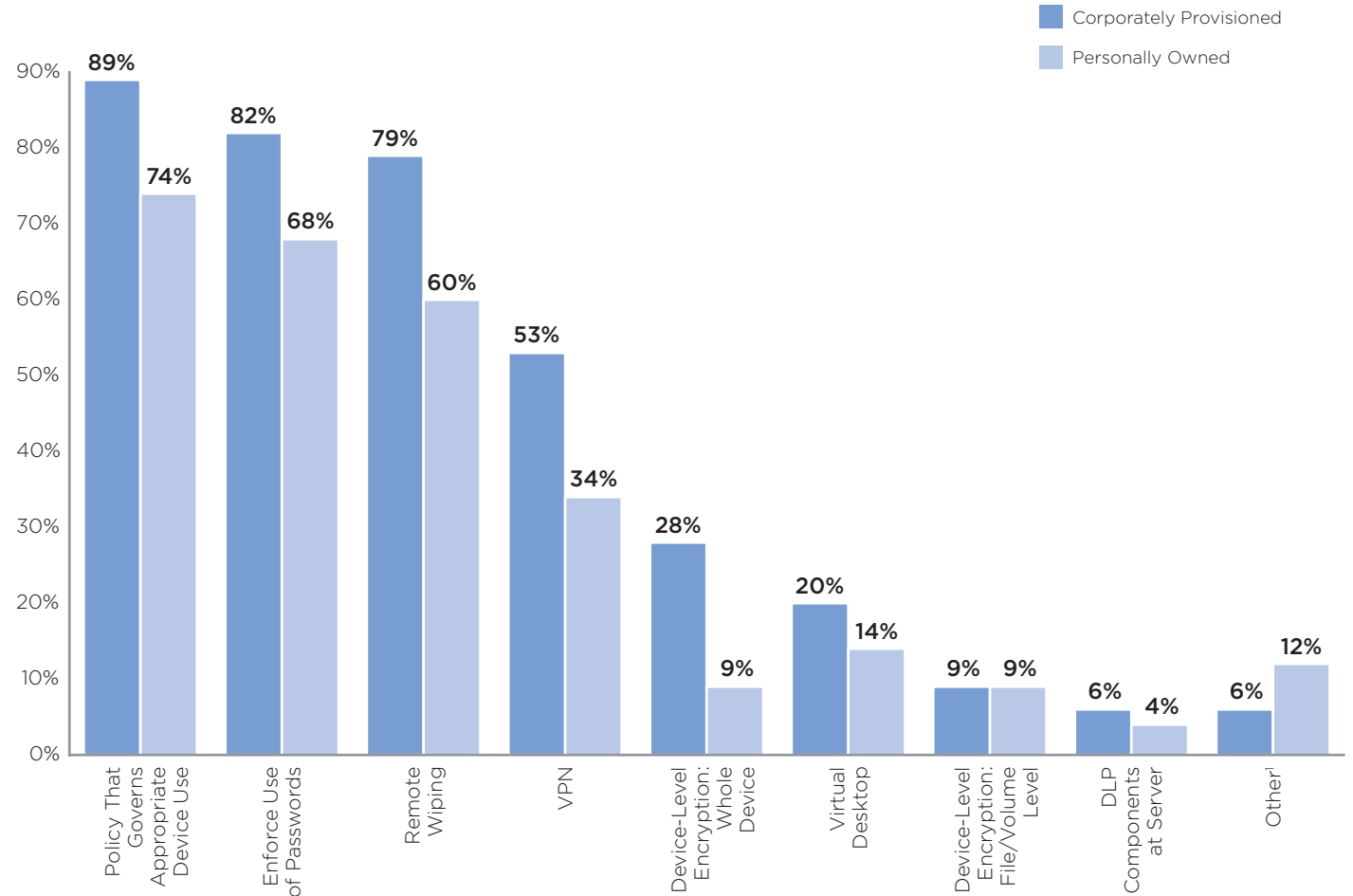


Most organizations implement security policies, enforce use of passwords, and enable remote wiping to mitigate risks associated with both corporately provisioned and personally owned devices.

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

POLICY AND TECHNOLOGY 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 = 127.

¹ "Other" includes VPN with Dual Authentication.



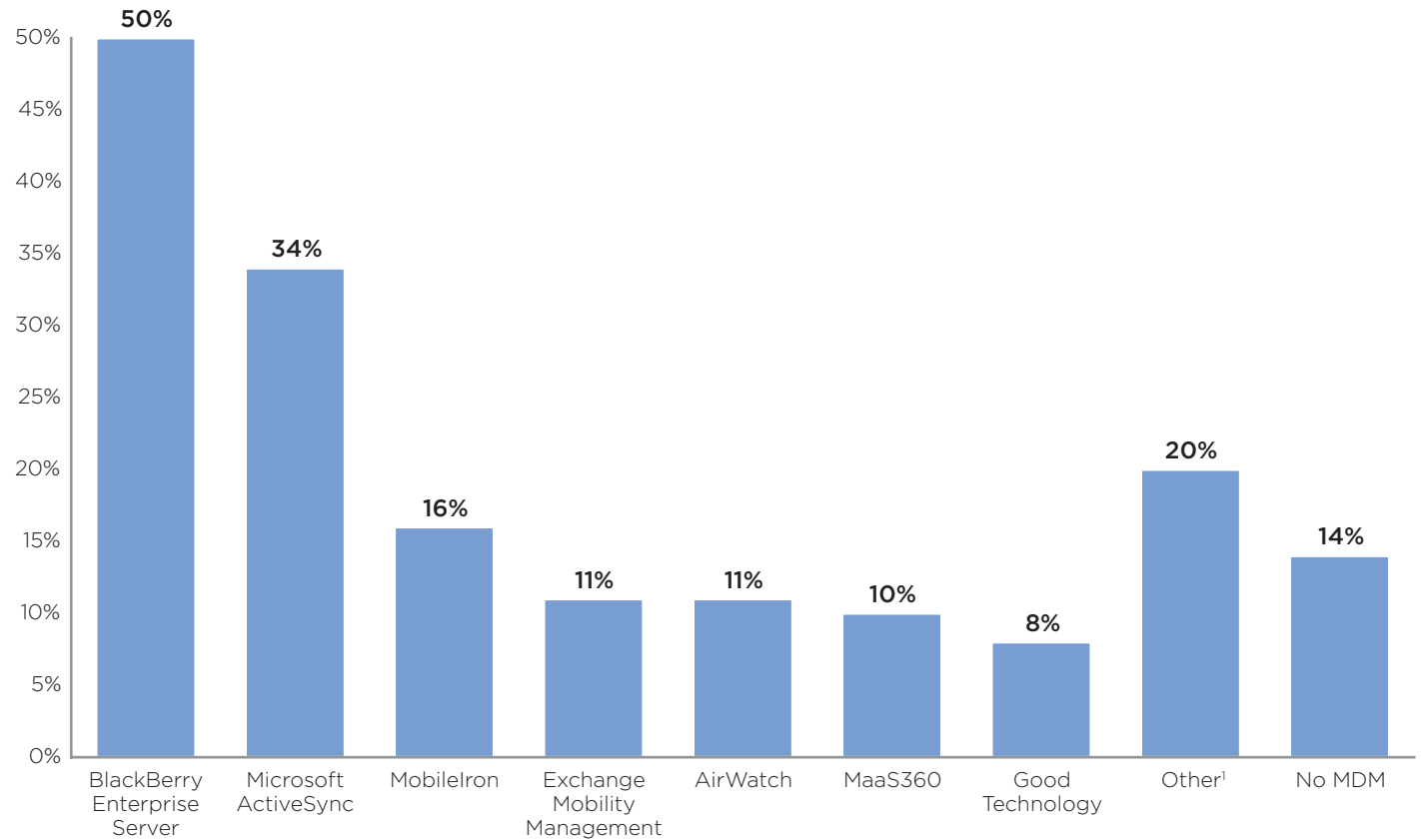
BlackBerry Enterprise Server and ActiveSync are the most popular MDM solutions for mid-sized organizations.

- Adoption of newer MDM solutions remains distributed evenly across five vendors.

NEW MOBILE DEVICE MANAGEMENT SOLUTIONS EMERGE

MDM Solutions Used

Percentage of Organizations, Multiple Responses Allowed



n = 132.

¹ "Other" includes TouchDown, Zenprise, LANDesk, Afaria, SOTI, Silverback.