

Good Technology's 2nd Annual State of BYOD Report

New data finds more industries and countries are embracing BYOD. Employees are still willing to pay device and service plan costs to use their personal devices for work.

good.com



Contents

Introduction	3
Key Findings	3
Methodology	4
Companies Supporting BYOD	6
BYOD Support by Geography	7
BYOD Costs for Employees	8
Conclusion	8
About Good Technology	9

Introduction

Today's workforce has become increasingly passionate about using personal devices—such as Android phones and tablets, iPads, iPhones and Windows Mobile phones—in the workplace. When they are able to use the devices and applications they prefer to collaborate and work with teams across the globe, it naturally increases their productivity and they are able to get work done more efficiently and with better results. As such, today's workforce increasingly expects corporate IT departments to support use of personal devices at work. A second installment to Good's first BYOD report (see <http://www1.good.com/news/press-releases/current-press-releases/135907453.html>), this year's survey results reveal that an increasing number of companies around the globe are freely embracing bring-your-own-device (BYOD) programs to help reduce costs and bolster employee productivity by allowing them to use the devices they prefer, to take advantage of mobile applications and work smarter. Additionally, the report underscores that the continued "consumerization of IT" is forcing enterprises and IT departments to develop programs and policies to regulate the use of and ensure the security of sensitive information being accessed by employees' personal devices.

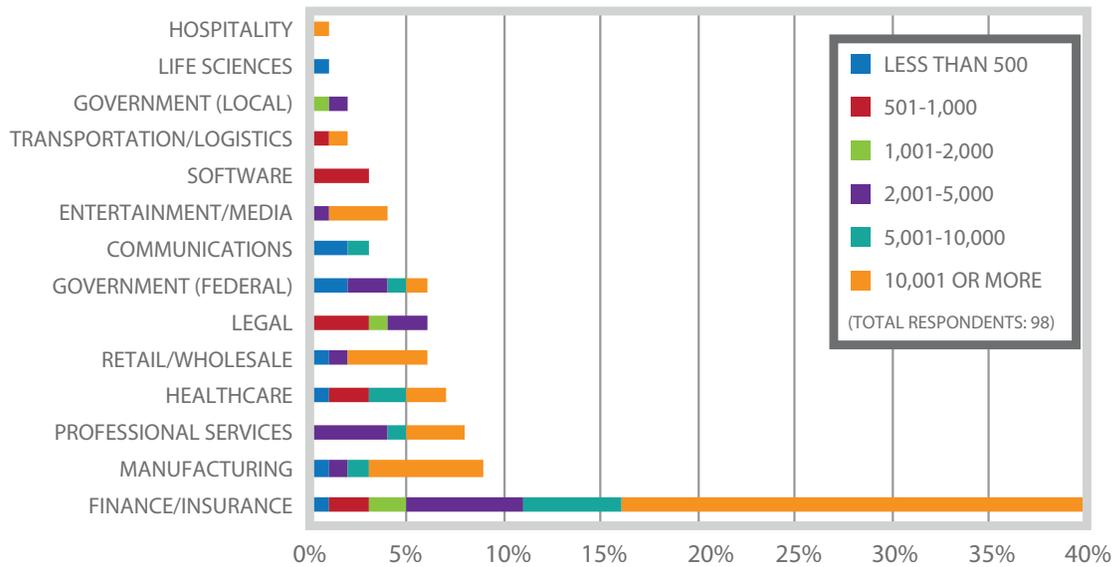
Key Findings

- **More Enterprises are Embracing BYOD:** The percentage of enterprises formally supporting BYOD increased from 72 to 76 percent. More significantly, those companies that indicated they had no plans to support BYOD dropped from 9 to 5 percent year-over-year, suggesting that BYOD is becoming more inevitable for the enterprise.
- **BYOD Expands Global Reach:** Companies are moving out of a U.S.-only BYOD-support model to to include support for more countries around the globe, and in multiple countries at once. Companies who began their support for BYOD on a more limited basis last year are now more confident about making that deployment more wide-spread.
- **Larger Enterprises are the Most Active in BYOD:** 75 percent of those supporting BYOD have 2,000 (or more) employees, and 46 percent have 10,000 (or more) employees.
- **BYOD is NOT Hindered by Regulatory Compliance or Security Concerns:** The Financial Service/Insurance and Healthcare industries continue to be among the biggest supporters of BYOD. This year's report also shows an increase in Government agency adoption of BYOD programs.
- **Employees Will Still Pay for Personal Choice:** 50 percent of companies supporting BYOD require that all costs be covered by employees who are more than willing to take their employers up on the offer! The other 50 percent provide a mix of options to their employees, such as a stipend or "expense back" options to help subsidize the cost of their mobile device or service plan.

Methodology

As a follow up to its December 2011 State of BYOD report, Good Technology surveyed the same set of customers to uncover current support for and perceptions of BYOD in the enterprise and see how BYOD perceptions and program support practices may have shifted in the last year. Good purposely targeted its most organizationally complex, multi-national, and highly-regulated customers in order to better understand how these types of companies were adopting BYOD and to share their best practices.

Good Respondents By Industry and Size



More Enterprises Choosing to Support BYOD

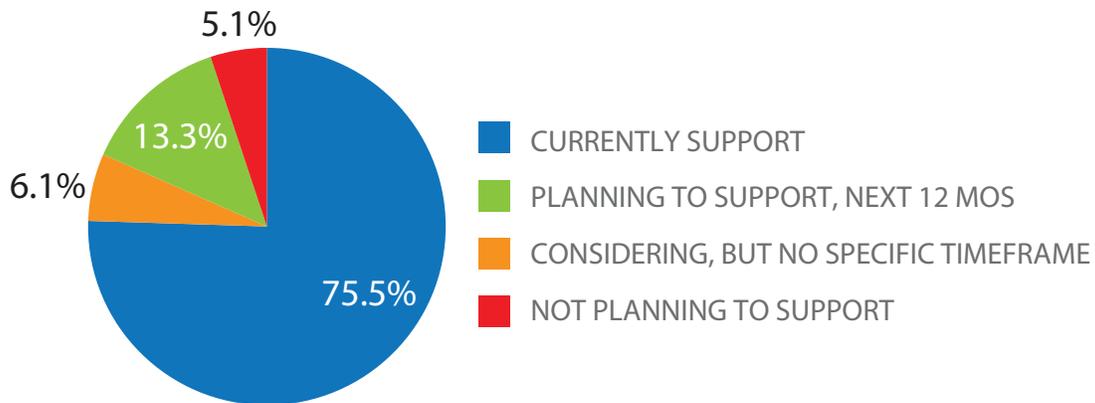
According to Good’s 2012 survey, more than 76 percent of companies with 2,000 or more employees were already formally supporting BYOD programs. Another 13 percent said they were planning to support it in the next 12 months, which would bring the total to 88 percent by December 2013.

Only 5 percent of 2012 respondents indicated they were not planning to support BYOD, which is down from 9 percent from the same time last year. This drop indicates that BYOD is becoming more inevitable and that more enterprises today are moving into the ‘planning’ or ‘considering’ categories in the year to come. The most common reasons cited for not supporting BYOD programs were HR/legal policy,—which can often tie back to overtime or wage concerns for temp workers— IT service and security concerns.

Good Technology believes that most of today’s enterprises have been able to alleviate their concerns regarding BYOD as a result of increased access to information and insights about best practices for supporting and securing BYOD deployments. With worldwide shipments of employee-liable business use devices expected to grow by 28.4 percent to reach 212.9 million units shipped by 2016, Good expects the consumerization of IT trend to continue to impact the workplace, furthering the growth of BYOD programs within the enterprise for the near term*.



BYOD Support



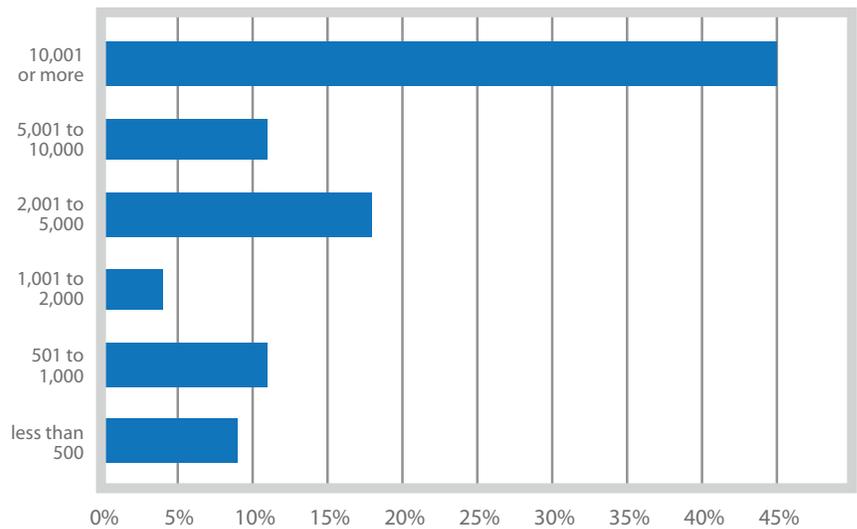
*“Multi-market BYOD Survey” by Richard Absalom, Ovum, 2012

Companies Supporting BYOD

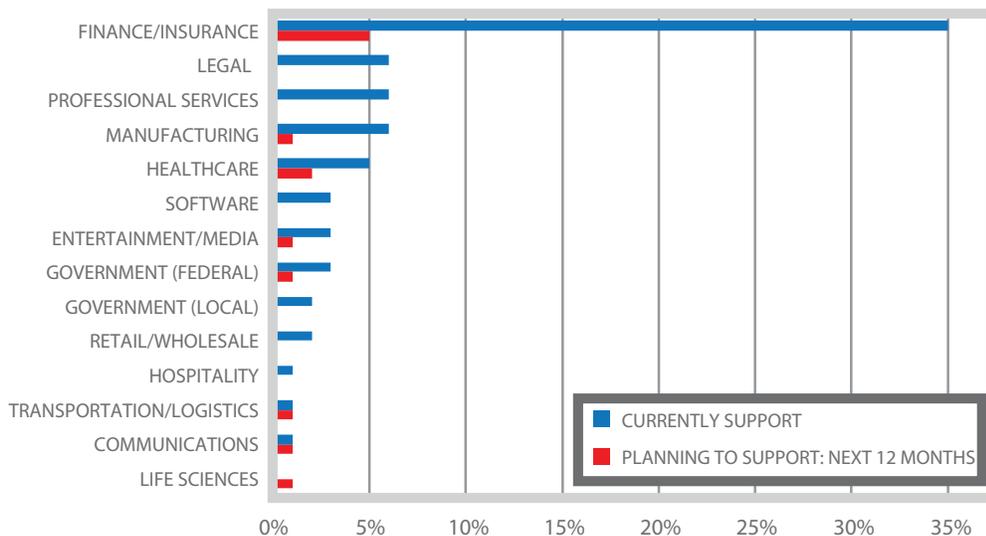
Seventy-six percent of the companies currently supporting BYOD have more than 2,000 employees, making mid-to-large sized companies the biggest adopters of BYOD. However, both small business and large enterprise companies have seen an increase in BYOD adoption over the last year. Approximately 25 percent of companies with less than 2,000 have instituted BYOD policies, whereas in 2011 only 19 percent had BYOD policies in place. Last year, 35 percent of large enterprises with more than 10,000 employees had a policy in place, and this year, those large companies with more than 10,000 employees make up the largest segment supporting BYOD at 46 percent.

The report also shows that Financial Service/Insurance and Healthcare industries continue to be the most active in industries supporting BYOD, with Government agency adoption of BYOD policies growing at a steadily rate.

Good BYOD Policies in Place By Company Size



Good BYOD Support By Industry

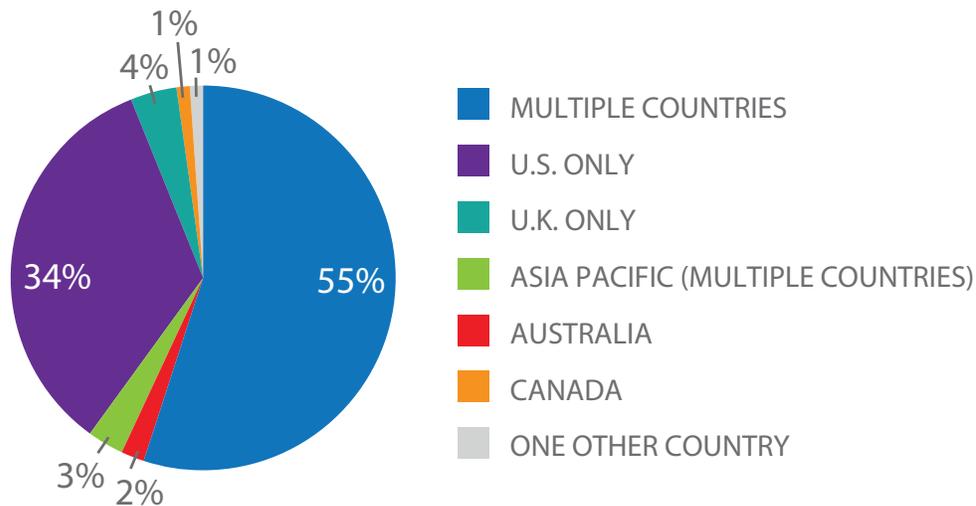


BYOD Support by Geography

BYOD is not only popular in the US, but also catching fire worldwide. According to Good's 2012 BYOD data report, more than half of companies currently supporting BYOD do so in multiple countries (55 percent) around the globe. This support has increased nearly 10 percent from last year, when only 45 percent of survey respondents supported BYOD in multiple countries. Last year, 49 percent of companies were limiting BYOD support to the U.S. and that number has decreased this year to 34 percent. Only 11 percent of companies indicated they would limit support of BYOD to a single market outside of the U.S. These results mirror that of a recent report by Ovum which found that BYOD adoption is occurring faster in emerging markets than mature markets*.



BYOD Support By Geography



*"Multi-market BYOD Survey" by Richard Absalom, Ovum, 2012

BYOD Costs for Employees

Half of the companies surveyed with BYOD policies in place said that employees are actually covering all costs, including device and data plans, associated with their personal devices. Good's survey also revealed that 24 percent of respondents use a stipend to encourage employee participation and help cover costs, while 19 percent allow eligible employees to expense back mobile services costs. In nearly all of the expense back environments, prior management approval of employee expenses was required and there was a fixed cap on expenses to help control costs. This expense back and cap model offers tremendous cost-savings for companies that switch from a company-owned device model, which can cost on average \$60-100 per device, such as smartphone/tablet per month.

Conclusion

Over the last year BYOD has undoubtedly gained traction in the enterprise. The number of companies that had previously stated they had "no plans" to support BYOD has markedly declined and corporate BYOD deployments has not only grown in sheer number but also increased from a US-only model to become more global in scale, as many large multi-national or foreign-based customers join in support for the trend. Even highly-regulated industries that have stringent security concerns and compliance measures to follow are freely embracing BYOD programs. Good Technology believes that this increased adoption of BYOD has been driven largely by the continued 'consumerization of IT' as well as an increased understanding of and access to information about best practices for supporting BYOD. There is no doubt that the use of personal devices in the enterprise is here to stay and employees will continue to take advantage of employer's BYOD programs to use the devices they prefer to get their jobs done in faster and more collaborative ways. Thus, organizations that are looking to increase the workforce productivity should embrace and offer support for employees' preferences for devices and apps. As they do so, it will be important for them to address the security of information being accessed by these devices, as well as the HR/Legal, cost structure and IT Support ramifications of such programs.

About Good Technology

Mobility is here, and business is changing. Your employees need to be productive on devices they bring from home. And you need to provision, monitor, and secure the mobile apps and services that allow them to collaborate anytime, anywhere. It's how people work now.

Good Technology is transforming how mobile work gets done, through secure app-to-app workflows that include integrated email, communications, document management, business intelligence, social business, wireless printing, and more. We also offer complete enterprise mobility management solutions, including device, app, data, and service management; as well as analytics and reporting. We complete our stack with professional services that include mobile deployment rollouts, BYO onboarding constructs, and platform transition consulting. Only Good offers a complete mobile solution that puts IT back in control.

All of Good Technology's secure solutions work to keep employees productive and corporate and personal data secure, and accessible. Established in 1996 and headquartered in Sunnyvale, California, Good Technology's services are used by 4000+ major organizations worldwide, including 50 of the Fortune 100 as well as more than 4,000 enterprise customers in 90+ countries operating on over 200 carriers. Good Technology has partnerships with industry leaders including Apple, Google, LG, HTC, Microsoft, Nokia and leading systems integrators.

Want to know more? Visit good.com.

Global Headquarters
+1 408 212 7500 (main)
+1 866 7 BE GOOD (sales)

EMEA Headquarters
+44 (0) 20 7845 5300

Asia/Pacific Headquarters
+1 300 BE GOOD

©2013 Good Technology Corporation and its related entities. All use subject to license terms posted at www.good.com/legal. All rights reserved. GOOD, GOOD TECHNOLOGY, the GOOD logo, GOOD FOR ENTERPRISE, GOOD FOR GOVERNMENT, GOOD FOR YOU, GOOD DYNAMICS, SECURED BY GOOD, GOOD MOBILE MANAGER, GOOD CONNECT, GOOD SHARE, and GOOD DYNAMICS APPKINETICS are trademarks of Good Technology Corporation and its related entities. All third-party trademarks, trade names, or service marks are the property of their respective owners. Good's technology and products are protected by issued and pending U.S. and foreign patents.

good.com

