Mobility in Business Report

Prepared by:

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Executive Summary

Mobility continues to change the way we do business at a dramatic rate. Ten years ago, no one was talking about bring-your-own-device (BYOD). Five years ago, smartphones represented just 22 percent of new U.S. handset sales—a share projected to reach 63 percent in 2014 (Statista.com). A strong consensus has emerged: mobility is now a top priority for business. Mobile devices, apps and data can help organizations operate more quickly and flexibly at a lower cost. For employees, mobility improves productivity, responsiveness and job satisfaction. As next-generation mobility strategies take shape, IT groups are implementing a broad range of supporting technologies as well as policies such as BYOD. At the same time, progress in mobility remains uneven. In some cases, companies in emerging economies are outperforming those in more developed European nations. One thing is clear—mobility will continue to be a powerful business trend and a key driver of IT change in the coming years, changing the way people work and organizations succeed.

Mobility is a Top Priority

Conducted in conjunction with Vanson Bourne, the Citrix Mobility in Business Report sheds light on perceptions of mobility, its importance for companies and its perceived impact for improving flexibility, productivity and agility. Key findings include:

- **Mobility is the top business or IT priority** for nearly two-thirds of companies; even those with higher priorities recognize it as a key objective to drive business transformation, competitive differentiation and IT value
- **Key business benefits of mobility** include the ability to execute tasks more quickly, increase flexibility, improve employee motivation and reduce costs
- **Key employee benefits of mobility** include increased productivity and flexibility, better responsiveness to customers and improved job satisfaction
- **Having a mobility strategy** is considered highly important or of the utmost importance by 71 percent of businesses, and nearly half have already implemented a formal mobility strategy
- **BYOD is quickly becoming the norm**, with the business use of personally owned devices allowed, accommodated and encouraged by 74 percent of companies
- **Technologies to enable mobility** are now in wide implementation, including mobile device management (MDM), mobile application management (MAM), desktop and app virtualization, file sharing and sync, web-based remote support and collaboration, and enterprise app store solutions
- **Regional difference remain**, with emerging economies such as the BRIC nations (Brazil, Russia, India and China) outpacing European economies in many categories

This white paper highlights the findings of the Citrix Mobility in Business Report. Areas of discussion include:

- How businesses around the world understand and manage mobility today
- Perceived business and employee benefits of mobility
- The state of BYOD in today's businesses
- Key technologies used to enable mobility

Methodology

The Citrix Mobility in Business Report was compiled by Vanson Bourne on behalf of Citrix to create a global snapshot of mobility in business across the globe. The report draws on data from 1,700 senior IT decision makers in 17 countries, including the U.K., U.S., Canada, China, India, Brazil, Russia, France, Germany, Denmark, Sweden, Australia, Singapore, Japan, South Korea, Thailand and Taiwan.

Results

How businesses around the world understand and manage mobility today

Mobility means different things to different companies. For some, the essence of mobility is the ability to work freely anywhere, on any device. Others define it more narrowly in terms of specific capabilities such as remote access to the corporate network, desktops, apps and data, or the ability to use email and edit files on mobile devices. These differences may be largely a matter of emphasis—several of the responses in the chart below can be seen as close variations on each other—but that emphasis may also reflect the strategic depth of the company's understanding of mobility. Any of the responses given reflect the ability of mobility to enable flexibility and productivity, but "the ability to freely work from any location and on any device" best captures the potential for mobility to truly transform the way people work.
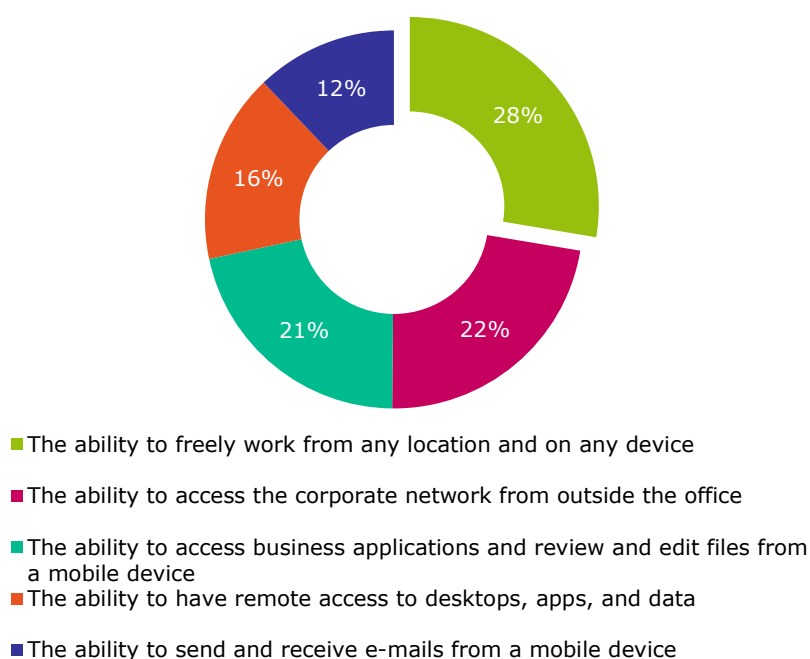

- The ability to freely work from any location and on any device
- The ability to access the corporate network from outside the office
- The ability to access business applications and review and edit files from a mobile device
- The ability to have remote access to desktops, apps, and data
- The ability to send and receive e-mails from a mobile device

Figure 1 – "Which of the following statements best describes the concept of enterprise mobility for your organization?"

Mobility is the number one business or IT priority for a majority of companies

Around the world, IT leaders recognize the power of mobility to drive their businesses forward. Almost half of organizations—45 percent—consider mobility their top business priority, citing either its ability to transform their business (24 percent) or differentiate it for customers and employees (21 percent). Another 14 percent view mobility as their top IT priority to meet business demands and deliver value for users. While 41 percent of businesses acknowledge more pressing priorities, they still recognize the importance of mobility for business transformation, competitive differentiation and delivering IT value for users.
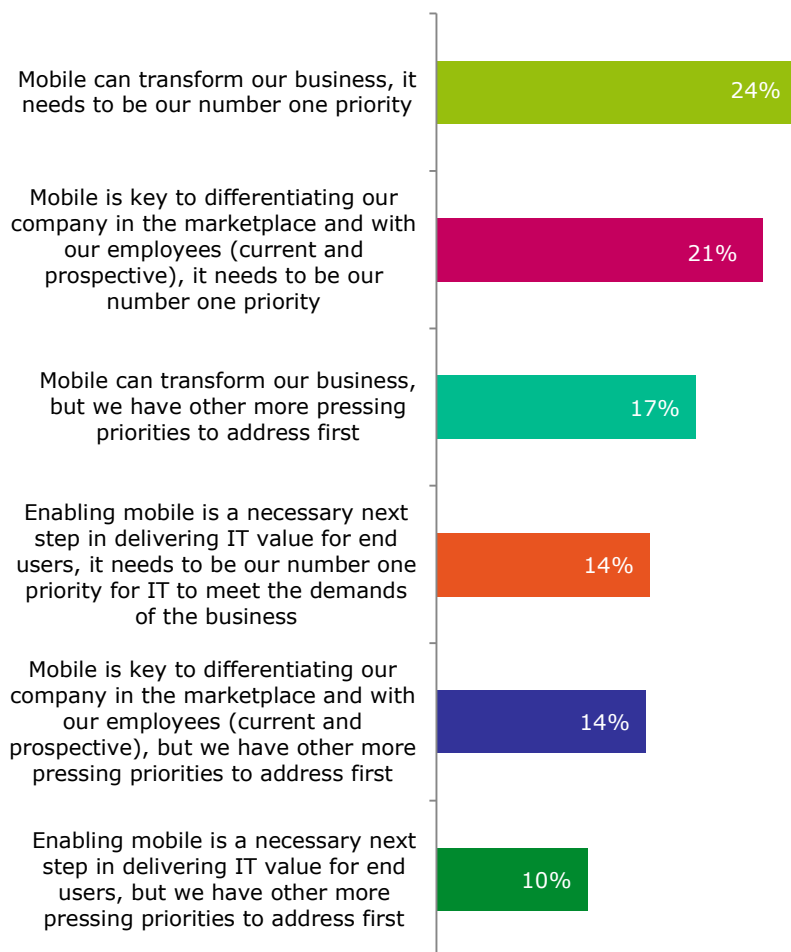

Figure 2 – "Which statement best describes the importance you place on mobile strategy for your business?"

Businesses recognize the importance of a formal mobility strategy

While business mobility often emerges in a gradual, ad hoc manner through limited initiatives such as mobile email and remote access, companies are increasingly taking a more comprehensive approach. Forty-seven percent of companies now have a formal mobility strategy in place, with an additional 35 percent to follow within

the coming year. Only 8 percent have not made plans to introduce a formal mobility strategy.
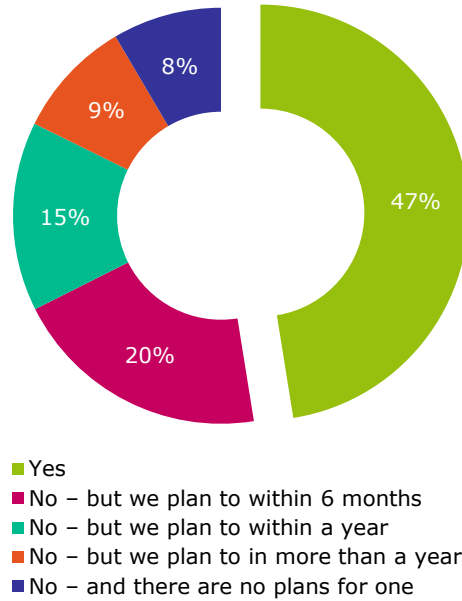

- Yes
- No – but we plan to within 6 months
- No – but we plan to within a year
- No – but we plan to in more than a year
- No – and there are no plans for one

Figure 3 – "Does your organization have a formal mobile strategy established?"

For those with a formal strategy, its business value has already become clear. 71 percent of businesses consider their mobility strategy to be either very important or of the utmost importance to their business.
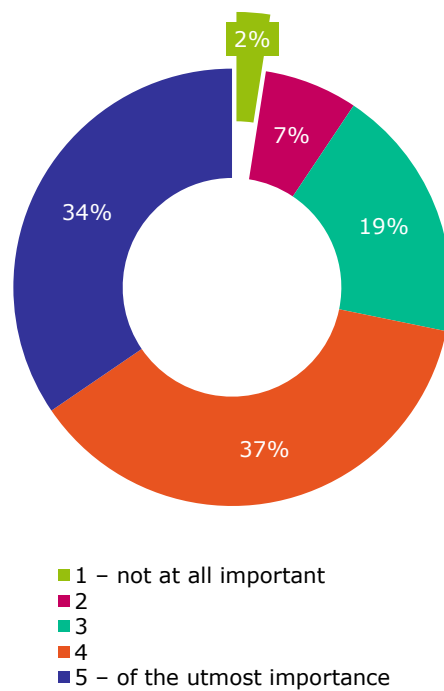

- 1 – not at all important
- 2
- 3
- 4
- 5 – of the utmost importance

Figure 4 – "How important is your organization's mobile strategy to your business?"

New technologies and policies for mobility are transforming the workplace

IT organizations are embarking on a wide range of initiatives to enable mobility for users and the business. These include projects focusing on mobile devices themselves, such as mobile app development, mobile device management (MDM) and mobile app management (MAM), and the infrastructure through which mobility is delivered, such as network performance and access. Other priority initiatives include the increased use of SaaS and web apps and tools to support remote employees, such as tools for secure file sharing, collaboration and remote help desk services. Policies around remote work, flexwork and device ownership are also viewed as priorities.
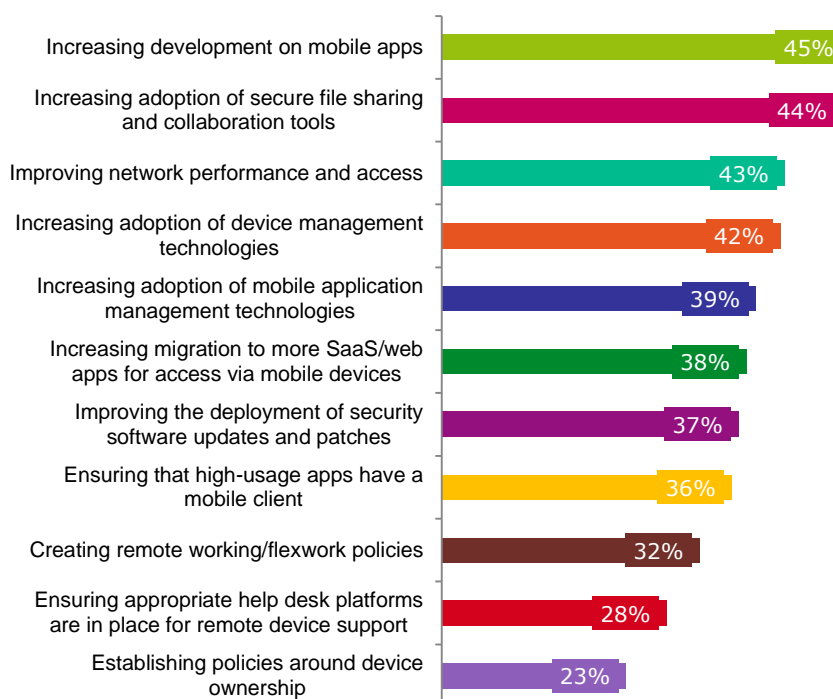
Initiative	Percentage
Increasing development on mobile apps	45%
Increasing adoption of secure file sharing and collaboration tools	44%
Improving network performance and access	43%
Increasing adoption of device management technologies	42%
Increasing adoption of mobile application management technologies	39%
Increasing migration to more SaaS/web apps for access via mobile devices	38%
Improving the deployment of security software updates and patches	37%
Ensuring that high-usage apps have a mobile client	36%
Creating remote working/flexwork policies	32%
Ensuring appropriate help desk platforms are in place for remote device support	28%
Establishing policies around device ownership	23%

Figure 5 – "Which of the following mobile initiatives are a priority for enabling your business?"

Organizations are allowing people to work in more places, on more devices

An overwhelming majority of organizations—91 percent—now allow some form of mobility. In some cases this is currently restricted to select people or circumstances, or to corporate devices, but 43 percent of respondents allow and enable people to work from anywhere on the device of their choice, including 29 percent which actively encourage the practice.
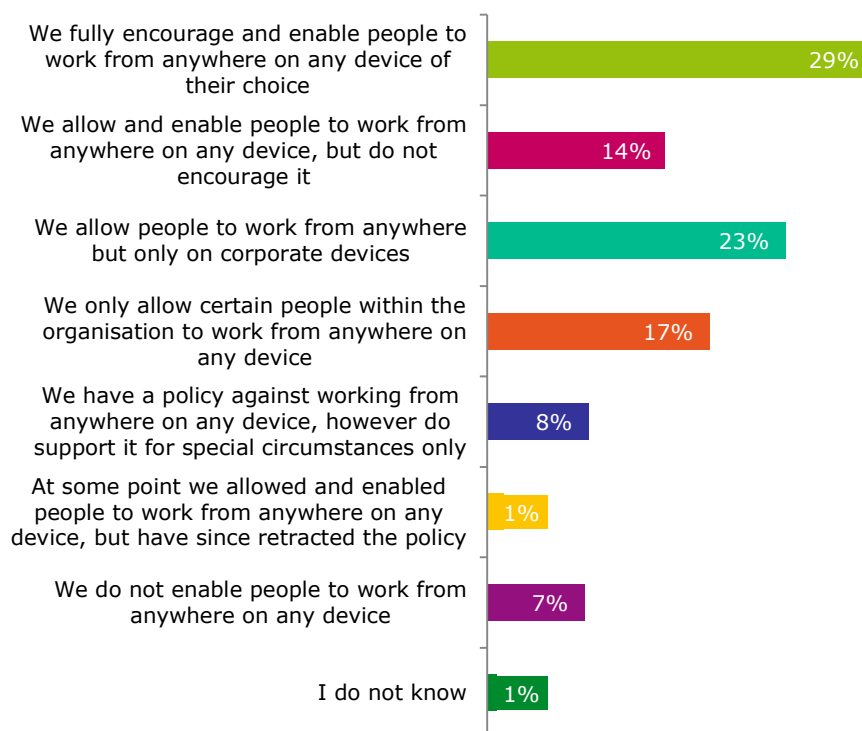
We fully encourage and enable people to work from anywhere on any device of their choice	29%
We allow and enable people to work from anywhere on any device, but do not encourage it	14%
We allow people to work from anywhere but only on corporate devices	23%
We only allow certain people within the organisation to work from anywhere on any device	17%
We have a policy against working from anywhere on any device, however do support it for special circumstances only	8%
At some point we allowed and enabled people to work from anywhere on any device, but have since retracted the policy	1%
We do not enable people to work from anywhere on any device	7%
I do not know	1%

Figure 6 – "To what extent does your organization currently enable people to work from anywhere on any device (either corporate or personally-owned)?"

Global differences remain

While there is a broad global consensus around the importance of mobility in business, there are significant gaps in the progress made among individual countries. By far, the most advanced countries in allowing and enabling staff to work from any location, on any device are China (69 percent) and the U.S. (63 percent), compared with a global average of 43 percent.

The U.S. and China also lead the world in actively encouraging people to work anywhere, on any device, at 48 percent of companies in each country—well above the global average of 29 percent. By contrast, only 13 percent of U.K. companies encourage mobility, the lowest score in the survey. This trails comparable European countries such as Denmark (23 percent), Germany (30 percent), France (35 percent) and Sweden (20 percent), as well as emerging economies including Russia (26 percent), Brazil (28 percent) and India (41 percent).
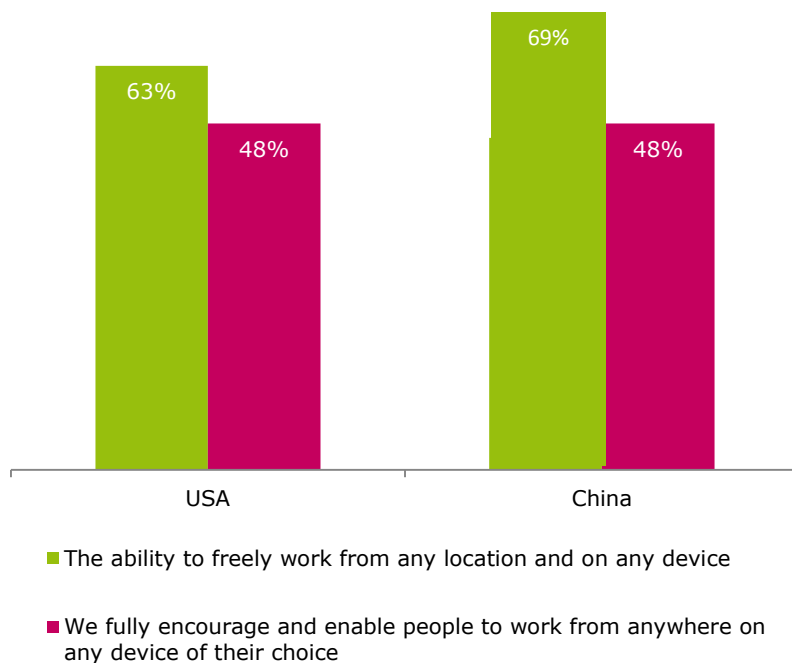
Figure 7 – The accommodation and encouragement of mobility in China and the U.S.

Perceived benefits of mobility in business

Competitive advantage

On a fundamental level, companies increasingly perceive mobility as a key factor in market differentiation. Nearly two-thirds (63 percent) of businesses consider mobility to be either very significant (38 percent) or the single greatest factor in organization competitiveness (25 percent); only 4 percent do not expect mobility to deliver a competitive edge.
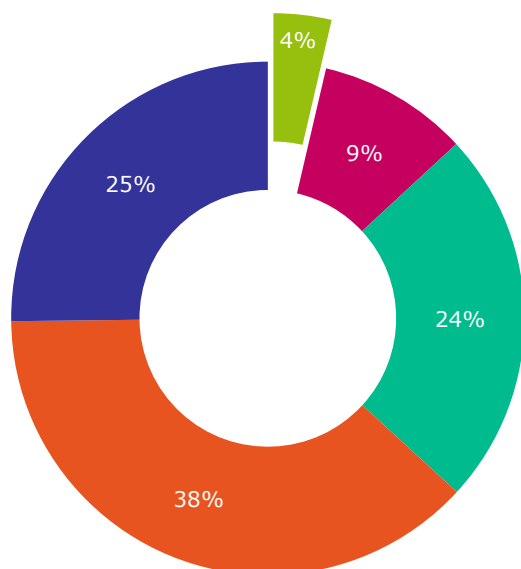
- 1 – mobile will give no competitive advantage at all
- 2
- 3
- 4
- 5 – mobile is the greatest factor in organisational competitiveness

Figure 8 – "To what extent do you believe having mobility as an initiative will give your organization a competitive advantage?"

Business and employee benefits

Companies report a broad range of benefits from their investments in business mobility. Nearly two-thirds (62 percent) cite the ability to execute tasks more quickly, followed closely by greater flexibility to meet customer needs (55 percent). Improved employee motivation, reduced costs, increased productivity, improved business continuity and better support for remote workers all rank highly as well.
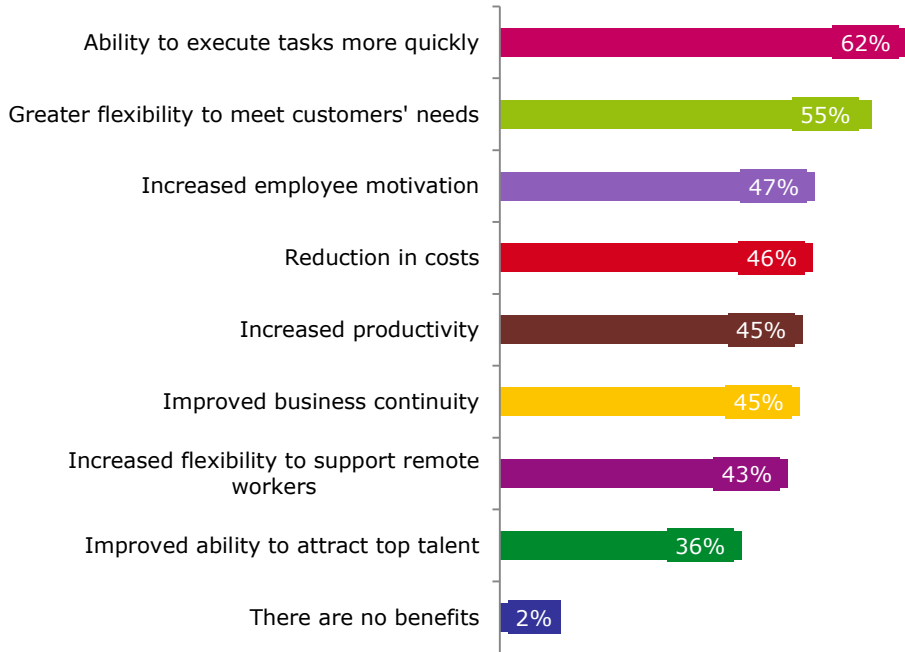
Figure 9 – "Which of the following do you believe are the business benefits of being a mobile organization?"

Employees also benefit from mobility. Over half of the respondents cited increased productivity (54 percent), better responsiveness to customers (46 percent) and greater flexibility (52 percent) as the most significant benefits for employees. Work/life balance and improved job satisfaction also ranked highly at 43 percent.
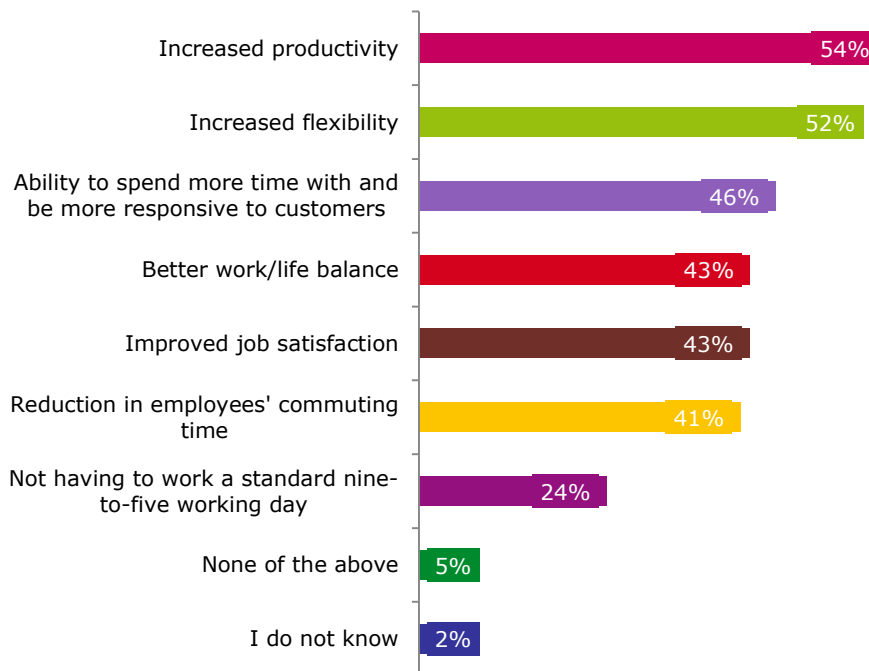

Figure 10 – "Which of the following benefits have your employees seen from being a mobile organization?"

The state of bring-your-own in today's businesses

BYOD is becoming standard practice

New technologies and best practices are allaying traditional concerns about security and support for personally owned devices. IT attitudes have shifted, and businesses now recognize that people need to be empowered to do their work in the way that best suits them. BYOD is gaining ground rapidly around the world, and a strong majority of businesses (74 percent) currently accommodate and encourage the use of personally owned devices for work.
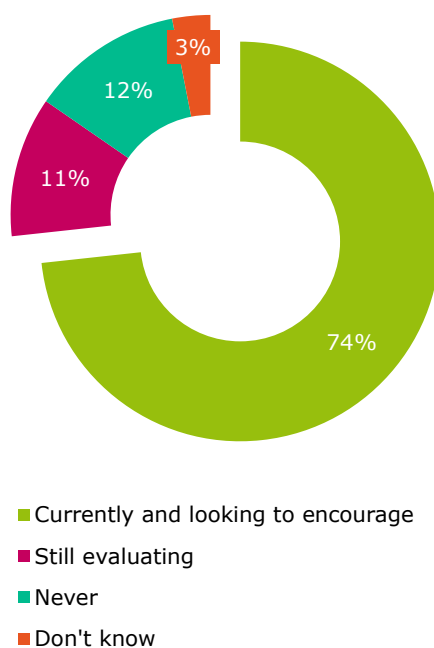

- Currently and looking to encourage
- Still evaluating
- Never
- Don't know

Figure 11 – "Does your current IT policy accommodate and encourage people to use personally-owned devices (BYOD) for work purposes?"

The adoption of BYOD can be seen as a recognition of an existing reality—the widespread use of personal devices for work—and an attempt to get it under control through more coherent policies and technology strategies. Seventy-six percent of companies estimate that more than 100 unidentified devices access their networks each day; an additional 15 percent are unable to estimate this number at all. The average number of estimated devices is 425.
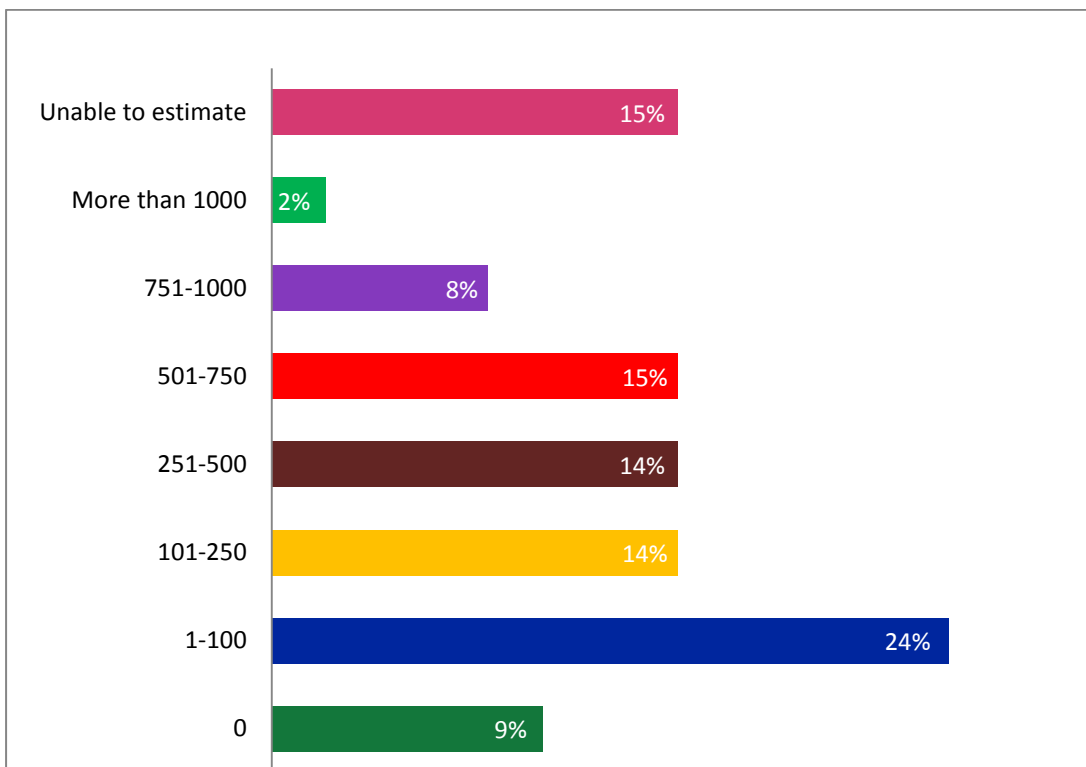
Figure 12 – "Please estimate how many unidentified devices are accessing your network on a daily basis?"

This is a source of considerable worry for IT. On a scale of 1 – 5, 56 percent of companies worldwide—and 78 percent of U.S. companies—rate their concerns about the number of unidentified devices on their network as a four or five.
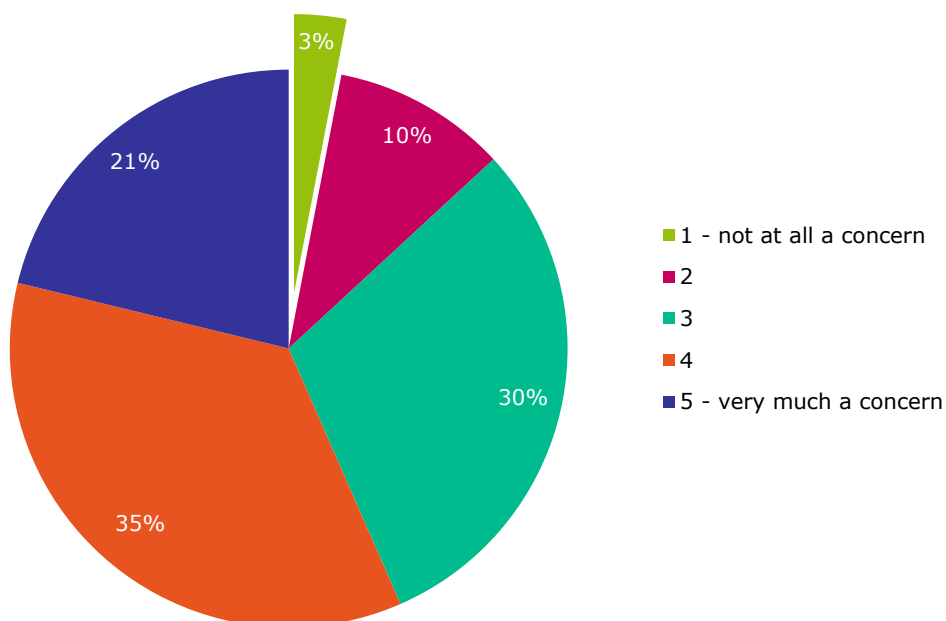

Figure 13 – "To what extent is the number of unidentified devices a concern?"

Employees increasingly bring their own apps

The rise of BYOD has come in tandem with a shift toward BYOA, or bring-your-own-apps, where employees use their own consumer apps for work purposes. These include apps in the most in-demand categories for mobile use, such as messaging, social media, and file sync and sharing. Only 7 percent of companies believe that none of their employees are using their own mobile apps for business purposes—the same as the share of companies who believe that 76 percent or more of their employees do so. Thirty-four percent of companies believe that between 26 – 75 percent of their employees are using BYO apps. This trend reflects an increased tendency of employees to take a more flexible, self-service approach to finding the most effective way to complete the job.
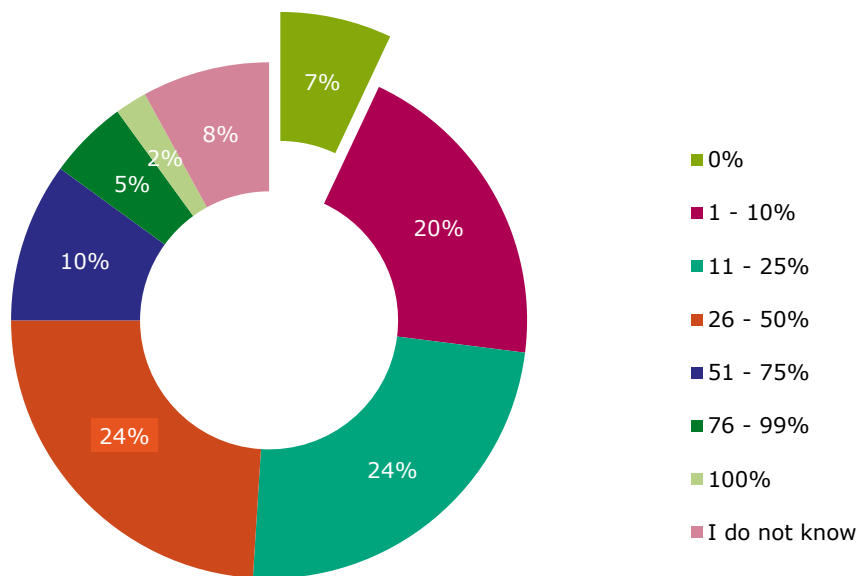

Figure 14 – "What percentage of your workforce do you believe are using their own mobile apps (BYOA) for work purposes?"

This practice does not come without some uneasiness for IT, however. In organizations where at least some employees use their own apps, IT concerns include the ability to manage data privacy mandates (46 percent), manage access control (45 percent), control application procurement (45 percent), ensure app security (44 percent), comply with regulatory mandates (34 percent) and the ability to prevent employees from accessing business information after leaving the organization (33 percent). The use of unmanaged third-party apps for work also leads IT to worry about employees saving information into unknown repositories (33 percent) or purchasing apps through stores or platforms with unknown security (33 percent).

From a management perspective, IT fears a high volume of IT support requests related to unsupported BYOA (23 percent), a lack of vendor leadership or agreement when it comes to app management (20 percent) and issues around app updates or version control (15 percent). Conversely, 28 percent of companies are concerned employee personal devices may be unable to support in-house developed apps.

Concern	Percent
Maintaining data privacy mandates	46%
Managing access control	45%
IT departments losing control over application procurement	45%
How secure the app is	44%
Complying with regulatory mandates	34%
Employees "opening-in" other apps outside of your control or saving information off into unknown repositories	33%
How secure the app store or purchase platform is	33%
Employees gaining access business information after leaving the organization	33%
Employee personal devices unable to support in-house developed apps	28%
Volume of IT support requests related to unsupported BYOA	23%
Lack of vendor leadership or agreement when it comes to app management	20%
App updates and/or version control issues	15%
Other	0%
We have no concerns	5%

Figure 15 – "Do any of the following concern you when thinking about people using apps on mobile devices?"

Android is the preferred mobile platform, but others remain strong

An increasing number of enterprises are embracing a variety of mobile platforms. Android was by far the most popular among respondents, with 72 percent saying they supported or were planning to support it; 65 percent have seen increased use of Android in their organization. Apple iOS remains popular as well, with 54 percent supporting or planning to support the platform, and 48 percent seeing an increase in its use. Microsoft Windows 8 is proving more popular than Windows Mobile; 46 percent of companies support or plan to support the more full-featured operating system, compared with 32 percent for the mobile version. BlackBerry still retains a significant presence, supported by 35 of companies, though only 18 percent have seen an increase in its use.
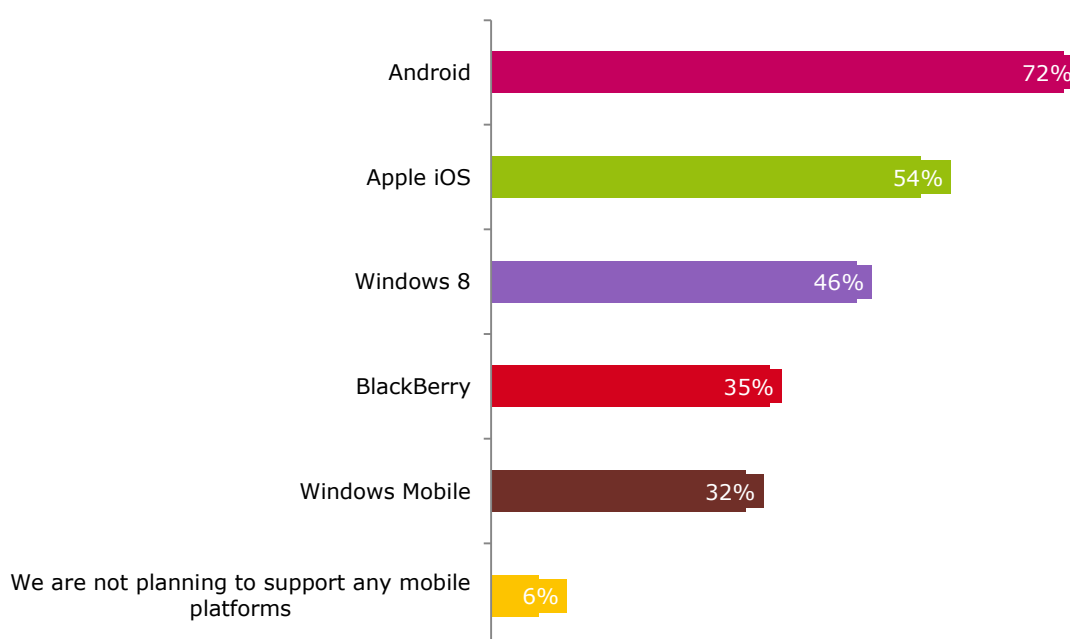

Figure 16 – "Which of the following mobile platforms are you supporting or planning to support?"
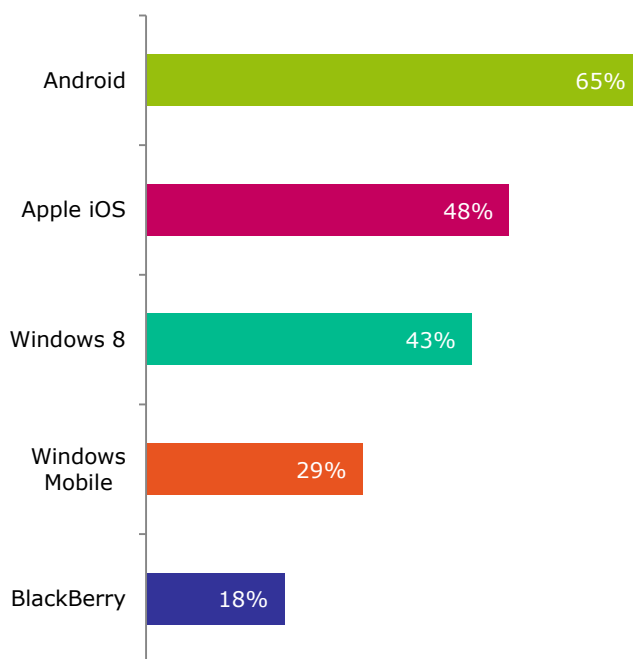
Figure 17 – "Have you seen an increase in the use of the following mobile platforms within your organization?"

Key technologies used to enable mobility

Mobility in business depends on a broad range of capabilities

IT leaders understand that empowering people to work anywhere, on any device requires a thoughtful and comprehensive technology strategy. Nearly half of the organizations surveyed have implemented solutions for MDM and MAM (48 percent and 47 percent, respectively). Forty-one percent currently support mobility through application virtualization or plan to do so in the future, and 40 percent through desktop virtualization. File sharing, sync and storage has been or will be implemented by 40 percent of companies to support mobile users.

To enable remote access, 39 percent of companies have implemented or will implement VPN solutions, and 33 percent will rely on single sign-on technologies. Enterprise app stores will provide self-service provisioning for mobile users at 35 percent of companies.

To erase distance among geographically distributed users, 37 of companies will rely on web-based remote support, 30 percent will use collaborative work platforms and social software, and 29 percent will use solutions for online meetings, webinars and training.
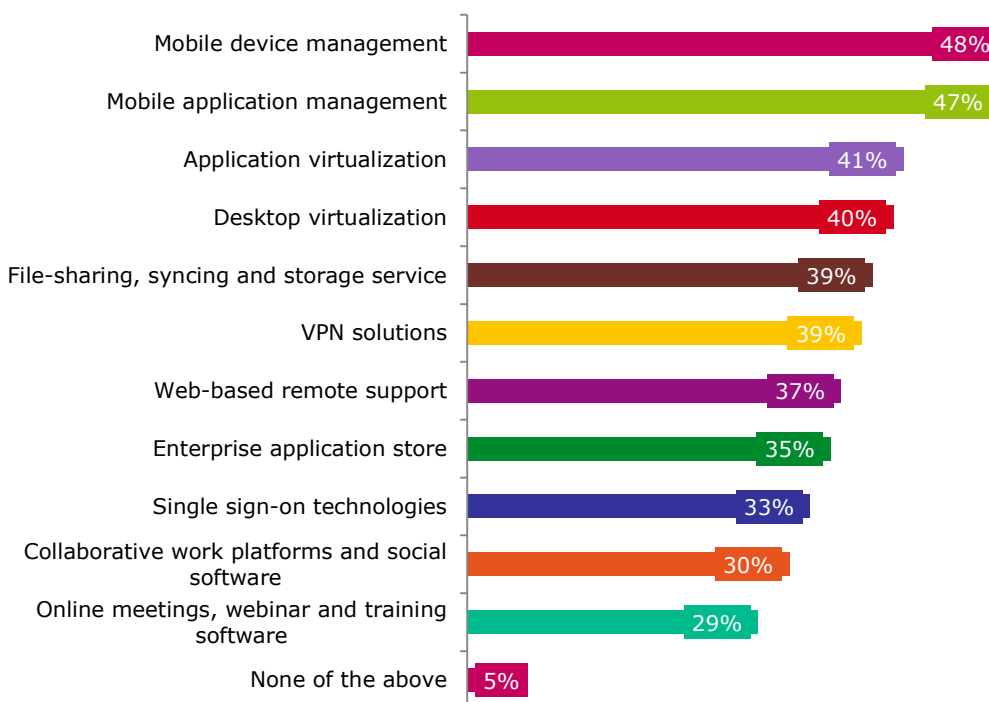
Figure 18 – "Through which of the following technologies are you supporting or planning to support your mobile strategy?"

Conclusion

In a remarkably short period of time, mobility has grown from an occasional use case—and perennial IT headache—to a top priority for businesses around the world. Companies have moved quickly to identify the business value of mobility, develop strategies and policies to harness it, and implement the technologies needed to support it. Employees have responded enthusiastically, embracing the freedom to work the way they want, anywhere, on any device, to achieve higher productivity and satisfaction. Peoples' personal devices and third-party apps are now an important part of the environment at a growing number of companies, while IT leverages new tools to ensure security and manageability regardless of how or where people work. The result: businesses can achieve greater flexibility, serve customers more responsively, recruit and retain the best talent more effectively, and compete more successfully—all while reducing cost.

The Citrix Mobility in Business report provides a high-level roadmap and best practices for any organization seeking to realize the benefits of today's mobile workstyles. Key measures include formulating a comprehensive mobility strategy, developing initiatives to enable mobility, supporting BYOD and BYOA, and implementing complete technologies for secure enterprise mobility. A comprehensive technology strategy should encompass MDM, MAM, desktop and app virtualization, file sync and sharing, remote access with single sign-on, an enterprise app store, and online platforms to enable support, collaboration and training from anywhere, on any device.

Companies around the world now recognize the importance and urgency of mobility. For those organizations whose strategies and technologies for mobility remain incomplete, making rapid progress to catch up should be seen as a mission-critical priority.

More information from Citrix:

- Website: Citrix virtualization and cloud products
- Website: Citrix solutions for mobile workstyles
- Blog: The Next Frontier: Mobilizing Legacy Enterprise Apps
- Webinar: The Journey to a Mobile Enterprise – Lessons Learned from a CIO
- Webinar: 5 Steps to Simple and Secure BYOD

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