



BYOD and Virtualization

Insights from the
Cisco IBSG Horizons Study

May 2012



Cisco IBSG
Horizons



Cisco IBSG Horizons Program

- Ongoing program of research and analysis to examine key technology innovations that will impact Cisco and our customers over the next 24 months
- Areas of investigation include video, collaboration, cloud, and mobility
- Focus on customer behavior and economics: adoption patterns, use cases, drivers, inhibitors, perceived benefits, delivery models

Source: Cisco IBSG, 2012

BYOD and Virtualization Horizons Study



600

IT Leaders

18

Industries

- All respondents director or above
- U.S. enterprises with at least 1,000 employees
- Decision-making responsibility for mobile solutions

Source: Cisco IBSG, 2012

Mobility Is Pervasive

78%

Employees who have a mobile device for work

65%

White-collar roles that require mobility

44%

Knowledge workers who telecommute at least one day per week

\$2,500

Annual per-employee cost saving from telecommuting one day per week

Source: Cisco IBSG, 2012

N = 600

The Impact of Mobility Growth on IT Is Profound

3.3

Average number of connected devices per knowledge worker in 2014, up from 2.8 in 2012

20%

Average share of IT spending devoted to mobility initiatives in 2014—up from 17% in 2012, 12% in 2010

Source: Cisco IBSG, 2012

N = 600

Traditional Funding Model Persists, but for How Long?

62%

Enterprises that pay for employee devices and voice and data plans

75%

Enterprises that expect the share of employee-owned devices connecting to company networks to increase somewhat to significantly over the next two years

41%

Enterprises where most smartphones connected to the company network are employee-owned today

Source: Cisco IBSG, 2012

N = 600

BYOD Is Here, and It's a Good Thing



88%

IT leaders who are seeing BYOD growth in the enterprise

76%

Consider BYOD somewhat or extremely positive for their companies

Source: Cisco IBSG, 2012

N = 600

Benefits BYOD Brings to the Enterprise

#1

Improved employee productivity, more opportunities to collaborate

#2

Preferred device means greater job satisfaction

Source: Cisco IBSG, 2012

N = 600

BYOD Value Depends on Employee Role

Annual Benefits (Illustrative Use Cases)



Source: Cisco IBSG, 2012

BYOD Does Bring Complexity: Top Concerns

A photograph of two men in a server room. The man on the left is wearing a dark suit and tie, holding a tablet. The man on the right is wearing a light blue shirt and tie, gesturing with his hand. The background shows server racks.

#1

New threats to security /
privacy of company data

#2

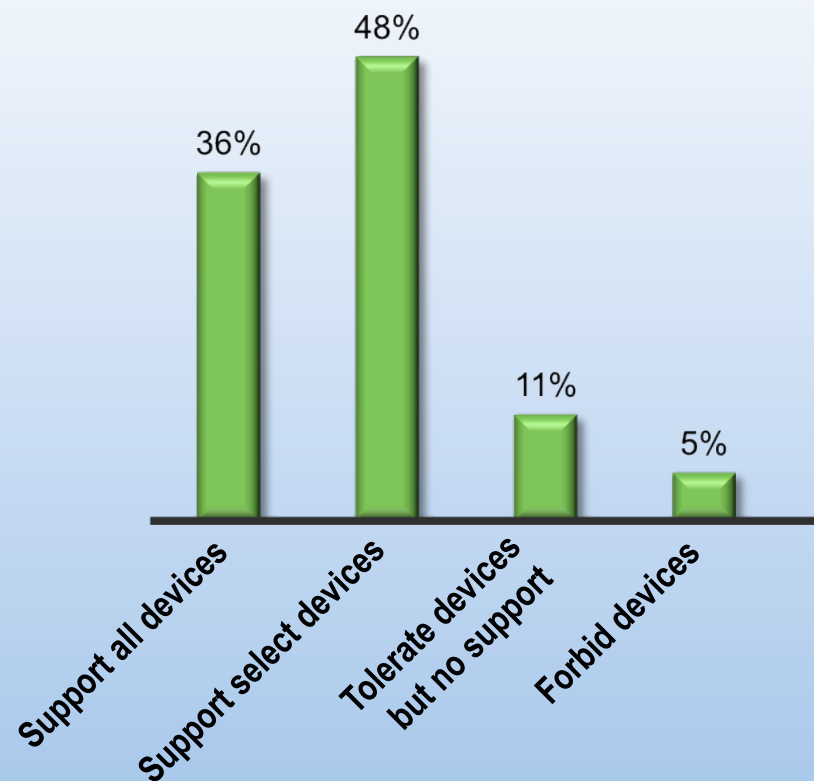
Providing IT support for
multiple mobile platforms

Source: Cisco IBSG, 2012

N = 600

IT Organizations Are Confronting BYOD Head-on

How companies provide IT support for employee-owned devices connected to the company network



Source: Cisco IBSG, 2012

N = 600

BYOD is a Major Disruption to Mobility Cost-Containment Efforts

#1 Strategy
to date

Device standardization
(29%)

#2 Strategy
to date

Automation of device
activation / configuration
(25%)

Source: Cisco IBSG, 2012

N = 600

Employees Want To Control Their Work Experience: Top BYOD Priorities



#1

Employees want an any-device, anywhere work style (40%)

#2

Employees want to do personal activities during work and work activities during personal time (38%)

\$600

Average amount current Cisco BYOD employees pay for preferred devices to help control their work experience

Source: Cisco IBSG, 2012

N = 600

Employees Also Want To Bring Their Own Applications

69%

IT leaders who say non-approved applications are somewhat to much more prevalent today than two years ago

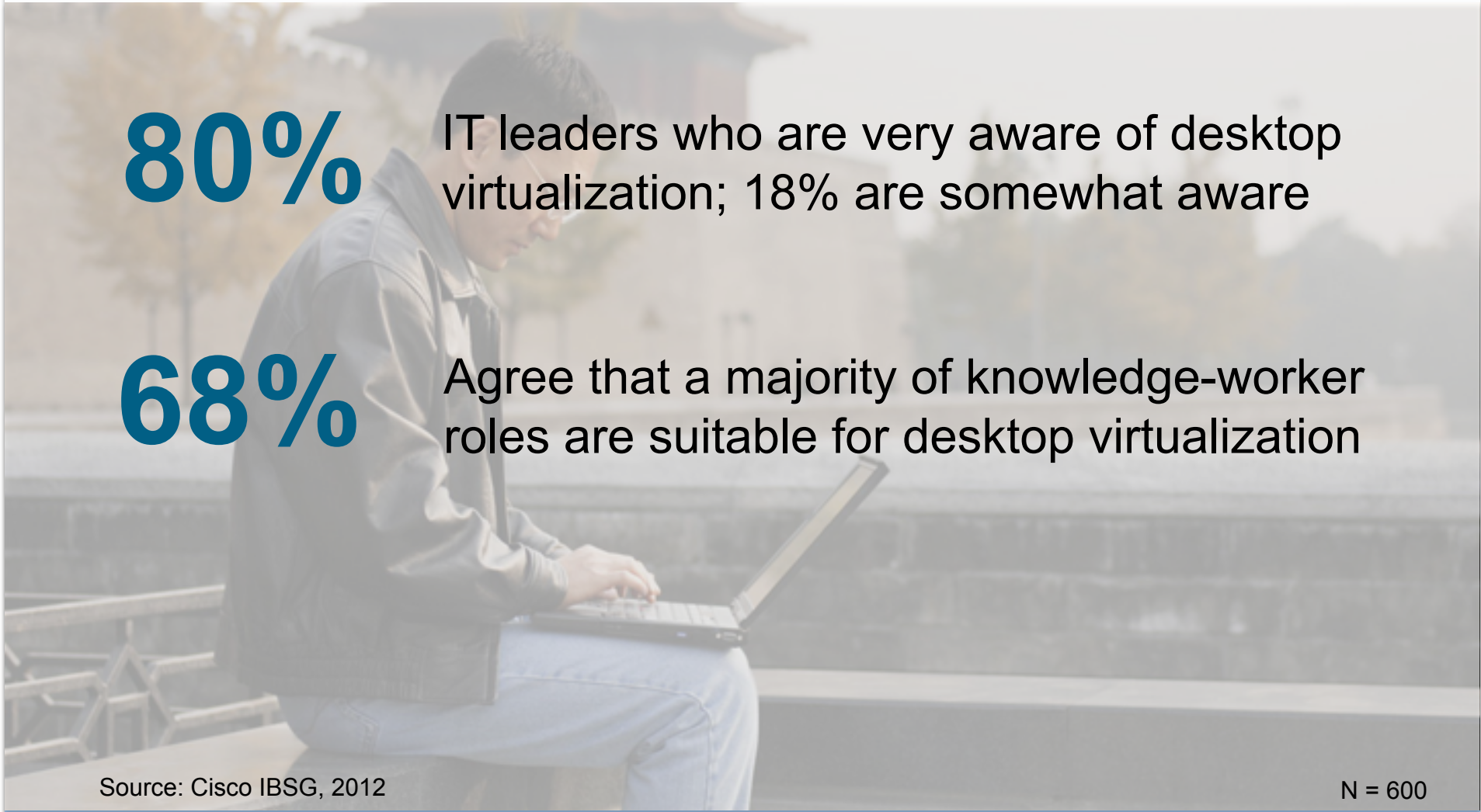
Top 3 Apps

- Social networks
- Cloud-based email
- Instant messaging

Source: Cisco IBSG, 2012

N = 600

Desktop Virtualization Is on the Rise



80%

IT leaders who are very aware of desktop virtualization; 18% are somewhat aware

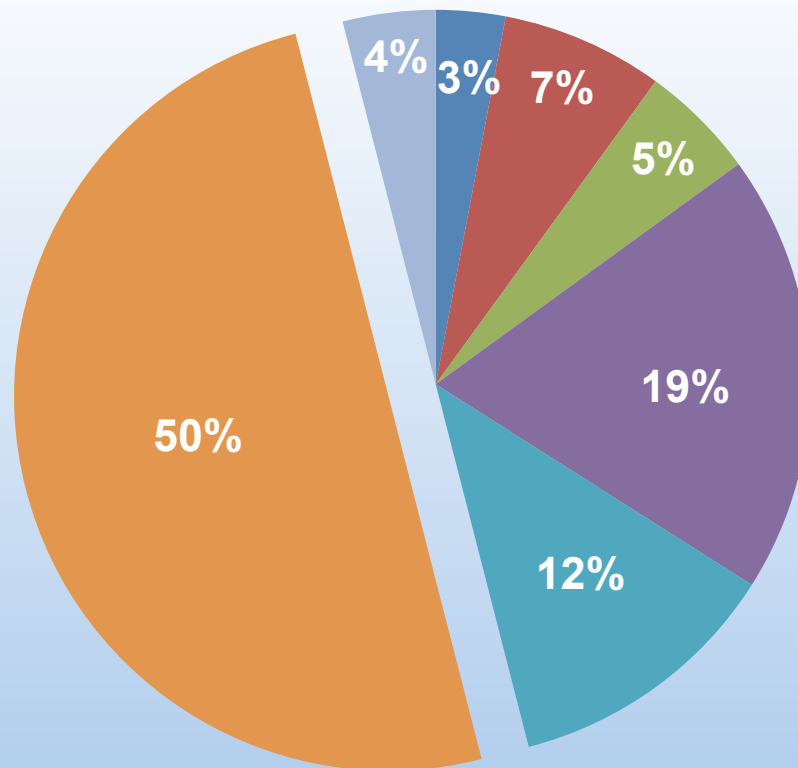
68%

Agree that a majority of knowledge-worker roles are suitable for desktop virtualization

Source: Cisco IBSG, 2012

N = 600

Enterprise Response to Desktop Virtualization Is Well Under Way



- No plans to develop a DV strategy
- Plan to develop a DV strategy in next 12 months
- Plan to develop a DV strategy in next 2 years
- Currently developing our DV strategy
- Formulated DV strategy but not yet implemented
- In the process of implementing our DV strategy
- Our DV strategy has been fully implemented

Source: Cisco IBSG, 2012

N = 600

Top Desktop Virtualization Drivers

#1: Data Protection—33%

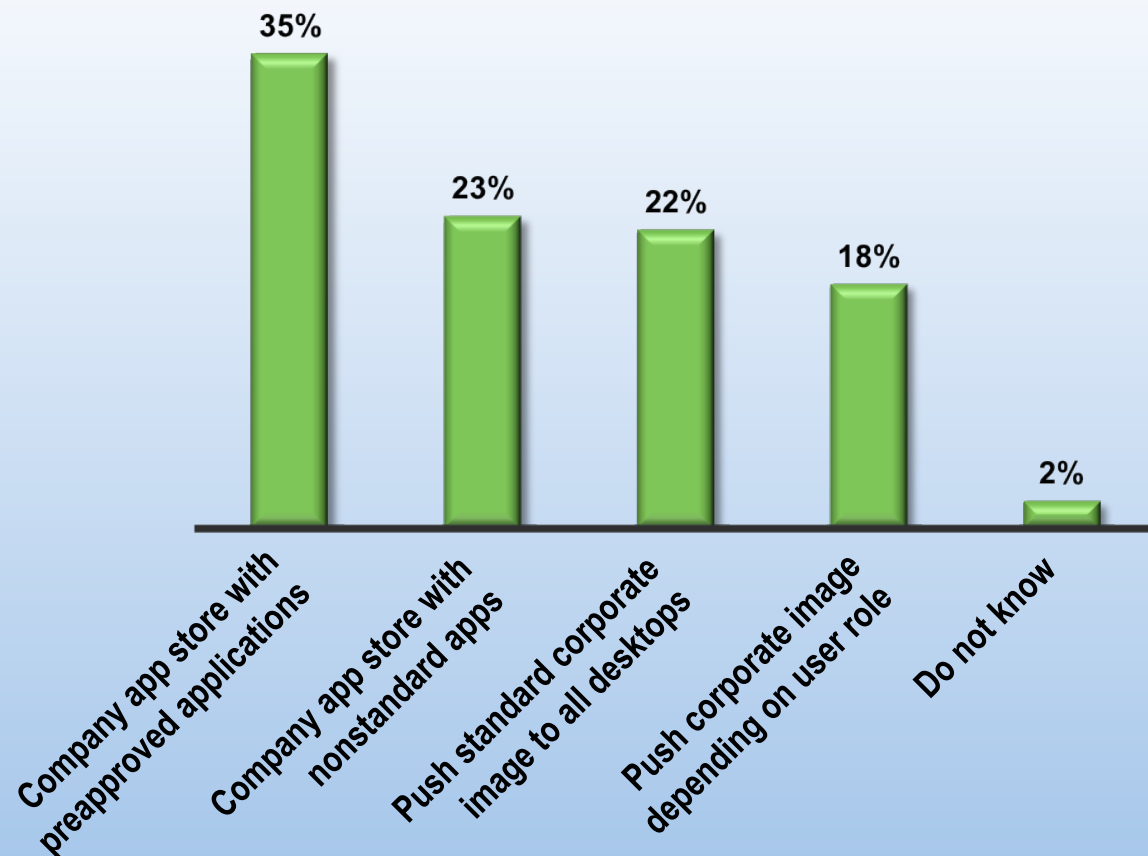
#2: Business Continuity—30%

Source: Cisco IBSG, 2012

N = 600

From Push to Pull—Is Traditional IT Provisioning on Its Way Out?

Primary application provisioning and management with current approaches to desktop virtualization



Source: Cisco IBSG, 2012

N = 600

Key Takeaways for Enterprises

- Mobility is pervasive in the enterprise, impacting knowledge worker job roles across the board
- While BYOD is merely the “tip of the iceberg” when it comes to gaining the full benefits of mobility, it is already having a significant impact on the enterprise
- Enterprises are responding actively to mobility innovations, including BYOD, with mature strategies and policies
- BYOD is seen as growing substantially, and as a net positive for organizations; improved employee productivity and satisfaction are key benefits
- BYOD, however, implies new challenges in security and support
- Desktop virtualization is top of mind for IT leaders, with nearly universal awareness. A majority of organizations have begun or completed implementation of their DV strategy.

Source: Cisco IBSG, 2012

For more information...

Joseph Bradley
Cisco Internet Business
Solutions Group

josbradl@cisco.com

James Macaulay
Cisco Internet Business
Solutions Group

jmacaula@cisco.com

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