

FOR: CIOs



2013 Mobile Workforce Adoption Trends

by Ted Schadler, February 4, 2013

KEY TAKEAWAYS

Anytime, Anywhere Information Work Is The New Normal

Today, we characterize 29% of the global workforce as anytime, anywhere information workers -- those who use three or more devices, work from multiple locations, and use many apps. This number has risen from 23% of the global workforce in 2011 and will continue to rise, as we will see 905 million tablets in use for work and home globally by 2017.

A Global Data Set Validates -- Or Challenges -- Your BYOD Strategy

How do you stack up against the global competition? Today, at least a quarter of a billion global information workers practice BYOD in some form. A third want an iPhone next, and 32% want a Windows tablet. Are you ready? The things you do today with smartphones and tablets will prepare you for a BYO computer future.

The Long Tail Of Mobile Business Apps Will Keep You Very Busy

Today, only email and some basic productivity tools are ubiquitous on tablets and smartphones. Your biggest challenge today may be a business-ready replacement for Dropbox, but a long tail of SaaS applications will be in your employees' hands with or without you. Start with file sync/share, but quickly prioritize real business apps.



by [Ted Schadler](#)
with [Simon Yates](#),
Nancy Wang, and Arun
Sharma

2013 Mobile Workforce Adoption Trends

More BYOD, More Devices, More Mobility, More Apple

WHY READ THIS REPORT

Have we hit peak bring-your-own-device (BYOD)? Which apps are most important on smartphones? How many employees are interested in Windows tablets? Do employees use mobile devices for work more at home or in a public place? The answers to questions like these form the backdrop for your own firm's mobile workforce strategy. By starting with a data-driven understanding of which devices, platforms, and apps matter to a global workforce, you will make investment decisions about BYOD and mobile apps, devices, and platforms with your eyes wide open. Read this report to get the story based on Forrester's Forrsights Workforce Employee Survey, Q4 2012 of 9,766 global information workers.

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HOW DOES YOUR MOBILE WORKFORCE COMPARE?

Forrester's survey of information workers in 17 countries reveals much about the free will of your workforce and what it means for working anywhere anytime. In every region and country, information workers are exercising their wallets and their feet to work on the device of their choice in any location that suits them. This study is packed full of valuable data and insights on your mobile workforce. We focus here on four concerns of CIOs:

1. **Employees: Mobility means more devices, more locations, and more apps.** The number of anytime, anywhere information workers — those who use three or more devices, work from multiple locations, and use many apps — has risen from 23% of the global workforce in 2011 to 29% in 2012. With tablets tripling to 905 million in use for work and home globally by 2017, the anytime, anywhere work trend is just getting started.¹
2. **BYOD: It drives the adoption of all devices — computers, too.** We have not yet hit peak BYOD, the mythical year in which IT regains control over the purchase and deployment of computers and mobile devices. If you define BYOD as employees paying, then we may be reaching the crossover point where your company pays for more smartphones than employees do. But if you define BYOD as employees choosing the devices they need for work, we are just getting going. Did you know that 33% of information workers globally want iPhones next? Or that 32% want Windows tablets? Or that 36% are willing to put in money to get the computer of their choice?
3. **Progress against competitors: It's crucial to mobilize your key applications.** Mobile devices are powered by applications of every ilk: productivity, collaboration, business, and specialty. Having apps on tablets and smartphones means that employees can carry their work in their pockets or on their shoulders and work from any location: Meeting rooms, coffee shops, and homes are just the most obvious new offices. Really, office space is now anywhere. How does your support for mobile apps stack up against the global competition? Do you have SharePoint mobilized yet? How about SAP? Or the employee portal? All are important for mobile workers.
4. **Valuable disruptions: Focus on software-as-a-service (SaaS) apps, starting with Dropbox.** No, vendors are not out to make your life difficult. But they do build solutions that your business needs, and then they target employees directly. This reality is reflected directly in the mobile app data where SaaS-provided tools lead the long tail of mobilized business apps. Already, one-fourth of information workers using tablets and 22% of all information workers use a file sync/share solution like Box, Dropbox, SugarSync, or YouSendIt — and 70% of employees using Dropbox use it for work or work and personal files.

MOBILE DEVICES MEAN ANYTIME, ANYWHERE WORKERS

Gone are the days when employees wielded a simple set of tools to get work done. In today's world of anytime, anywhere work, employees use whatever device is most convenient: desktop at home, laptop at work, tablet in a client meeting, or smartphone everywhere. The convenience of mobile devices sets the bar for what your mobile workforce expects: They want access to the Internet and to all their business tools from any location on any device.

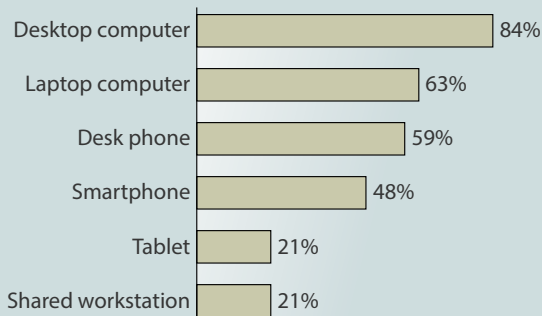
We are just getting started with the demands of anytime, anywhere workers. The steady rise of smartphones (almost half the global information workforce uses smartphones today) and the explosion of tablets (we'll see 905 million tablets in people's hands by 2017) mean that your mobile

workforce future is multidevice and multilocation. The rise of the anytime, anywhere workforce means that CIOs must think carefully and strategically about mobilizing their core systems of record and also about implementing new "systems of engagement" that make data and content available on any device.

CIOs can prioritize their device and app investments by walking a mile in employees' shoes. Build a very deep marketing understanding of who your employees are and what they use technology for. Start with a simple segmentation of employees' mobile and application requirements so you can provision the right services on the right devices based on business outcomes, not just on intuition.

1-1 A World Of Multidevice Workers

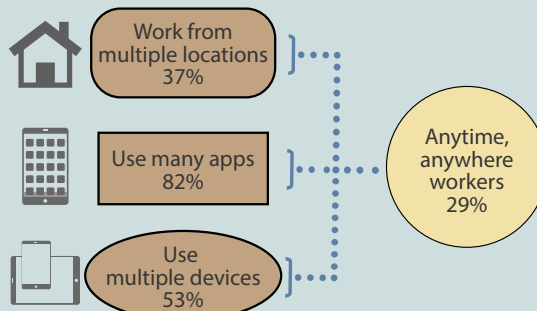
Which of the following devices do you use at least weekly for work?



Base: 9,766 global information workers

1-2 The Rise Of Anytime, Anywhere Workers

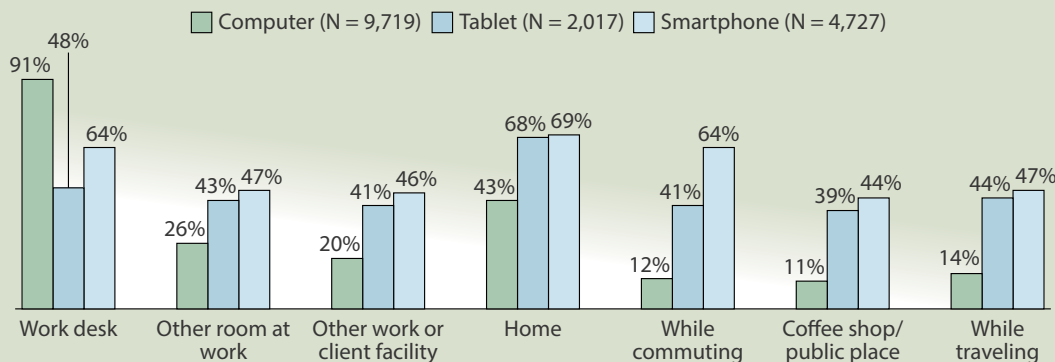
Anytime, anywhere workers in the US and Europe grew from 15% to 29% of employees between 2011 and 2012.



Base: 4,938 US and European information workers

1-3 The Multidevice Worker Is On The Move

Where do you use the following devices in a typical week?



Base: global information workers using each device

BYOD TOUCHES AT LEAST 258 MILLION WORKERS GLOBALLY

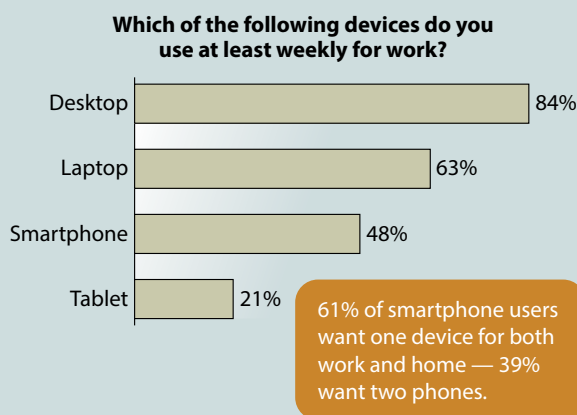
BYOD is more complex than it first appears. Does it refer to employees choosing their own device and brand? Or paying for that device? We think it applies to both things because both choice and willingness to pay will change your approach to provisioning devices. With that in mind, BYOD includes the 258 million global information workers who chose their own laptop and also the 129 million workers who paid for a smartphone for work.²

Statistically speaking, smartphones are the category in which BYOD has its biggest impact today, both in sheer numbers and in willingness to pay. But it's notable that

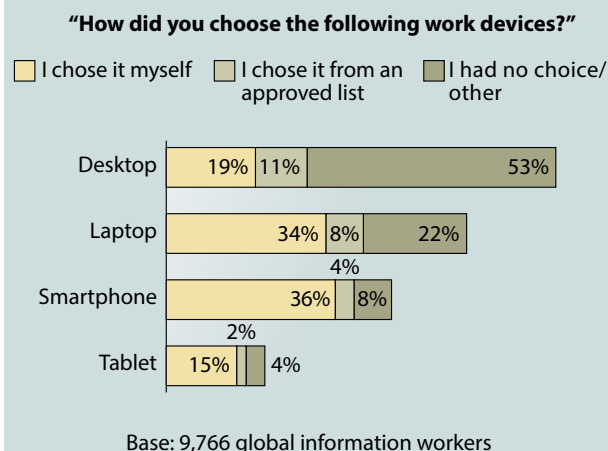
employees are also very interested in choosing their own laptop and even in sharing the cost of a computer if it suits their particular needs better. We read that result as code for "I'd like a MacBook or iMac, please." But more on that later.

For CIOs, BYOD is both an opportunity to outsource cost to employees and also a call to action to implement security models and application architectures that are device-agnostic. Only in this way can you get out of the business of device provisioning and into the business of service provisioning, and that's where you can make a real difference in employees' satisfaction and productivity.

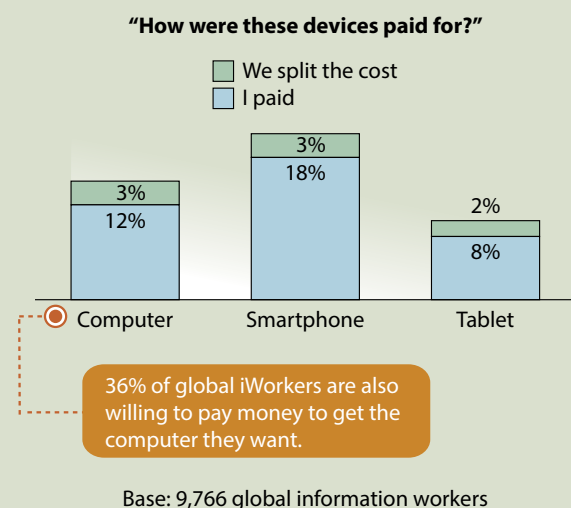
2-1 Start With The Devices Used For Work



2-2 Then Find Out Who Chose Their Own



2-3 Next, See Who Paid For The Devices



2-4 Net It Out: Who Paid And How Much?

	I use	I chose	I paid	
Desktop	84%	30%	15%	
Laptop	63%	42%		
Smartphone	48%	40%	21%	
Tablet	21%	17%	10%	
Base: 9,766 global information workers				
	I use	I chose	I paid	How much
Desktop	515	185	92	\$861
Laptop	387	258		
Smartphone	298	246	129	\$420
Tablet	127	105	62	\$526
Forrester forecast of global information workers paying for their own work devices ² (numbers in millions)				

APPLE AND MICROSOFT WILL BATTLE FOR YOUR EMPLOYEES

Apple is the most important new technology supplier to the enterprise since Microsoft itself in 1985. Apple's presence in computers, smartphones, and tablets makes it a critical supplier to the enterprise. Android, too, has and will continue to have a big share in mobile devices, and Windows will be a rising force in tablets.³

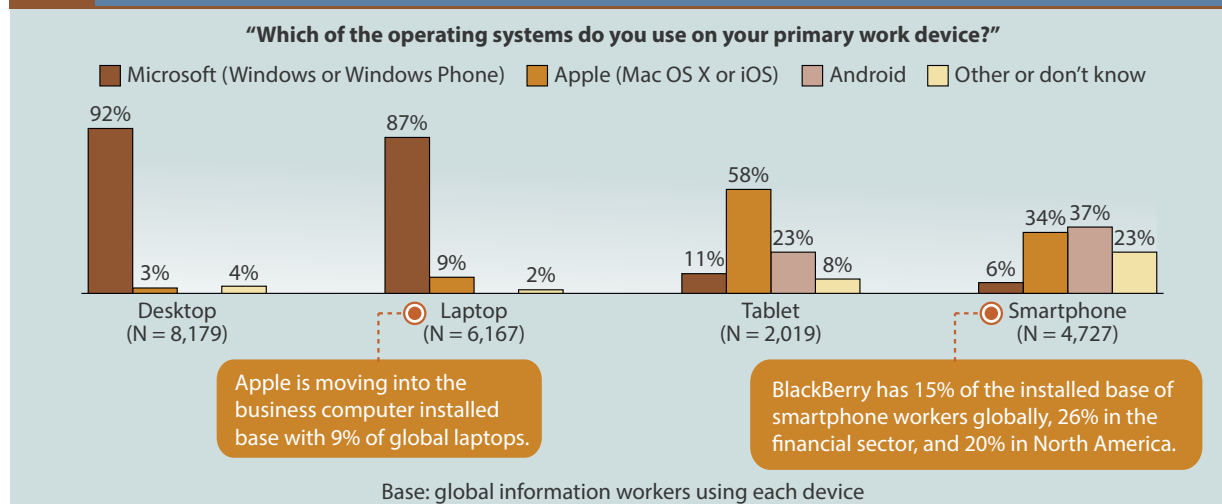
RIM's BlackBerry is a fading presence. In late 2012, RIM had a 15% share of the installed base in workforce smartphones.

Practically speaking, that means RIM's installed base fell somewhat, but Apple and Android came out of nowhere to gain dominant share.

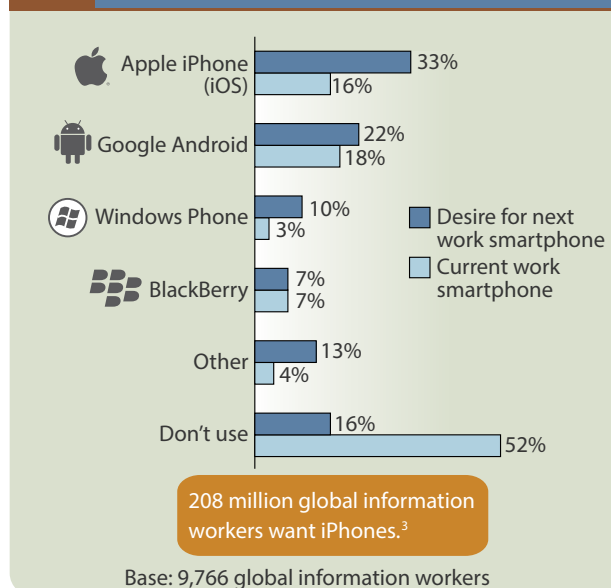
For CIOs, there are three mandates that arise from this data:

1. Apple and Android will be major suppliers to the enterprise.
2. Microsoft has a fighting chance in tablets.
3. The workplace of the future is multiplatform.

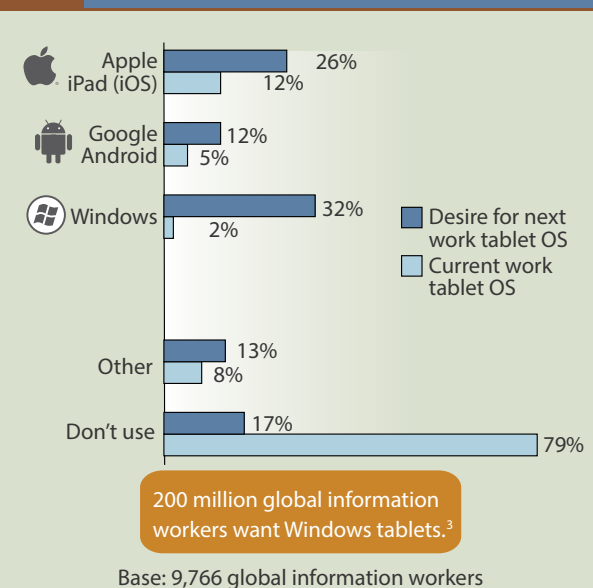
3-1 Apple And Android Are The New Enterprise Mobile Platforms



3-2 Apple's Smartphone Star Will Soar



3-3 Microsoft's Tablet Future Looks Bright

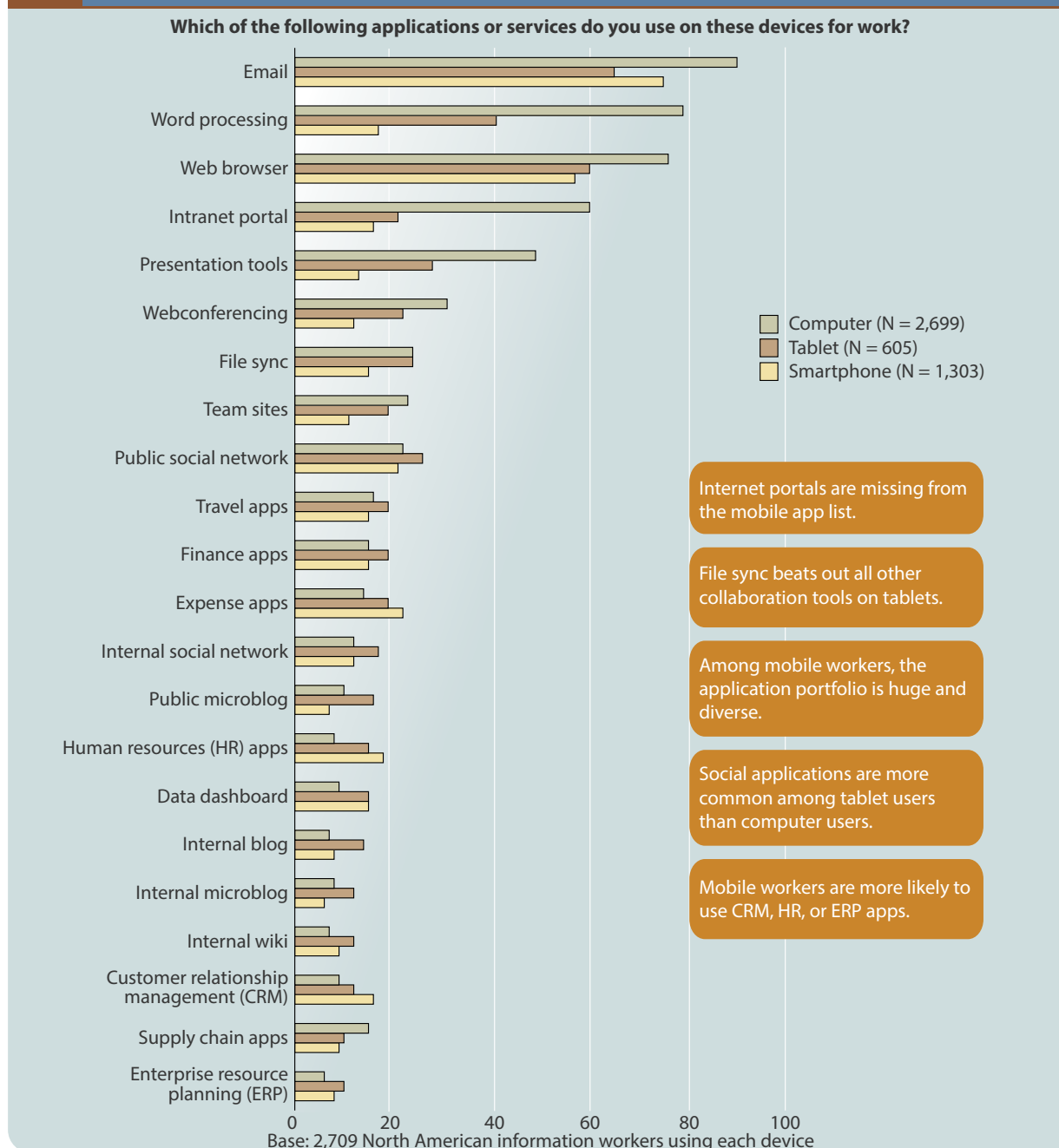


THE MULTIDEVICE APPLICATION LIST HAS A VERY LONG TAIL

The long tail of apps is just as important — and scary to a workforce experience administrator — as it appears. Employees want, nay, need every app on every device in order to be fully mobile and productive. For CIOs, this data has a clear message: If the app runs on a

computer, then employees will want to run it on their smartphones and especially their tablets. We recommend that you invest in a file sync/share solution in 2013 to mobile-enable a lot of the workflows and productivity scenarios that your workforce clamors for.

4-1 In North America, Tablets Are In Pursuit Of A Complete App Portfolio



YOUR 2013 MOBILE WORKFORCE MISSION IS ANYTIME, ANYWHERE WORK

Your employees are forging ahead with mobile devices and cloud apps to get work done in the most efficient and beneficial way possible. To best support your growing anytime, anywhere workforce, take these steps in 2013:

- **Establish a workforce computing working group that includes employees.** To get a pulse on what employees really need to get work done and why, tap into their collective wisdom. This working group — often jump-started with an employee survey — should be part of your planning process. Armed with this information, you can more easily prioritize the next device they want and the next application they crave. When working with this group, capture their working context as well as their requirements. For example, it may be more than just note taking — it may be note taking on any device offline and automatically synchronizing when back online with a notification to colleagues that new information is available.
- **Recognize the alignment between your interests and an employee's interests.** It may surprise you that 70% of employees using Dropbox use it solely for work (35%) or for work and personal files equally (35%). That aligns their interests and yours: If they lose their device, they are personally exposed. One eye-opening quote from a CIO we spoke with recently: “Employees who lose their phones are the first to call to have us wipe them. They feel more at risk with personal logins and data than we do with business data. They are happy to have us wipe the device clean.” Translated into policy, this means that a simple “kill” switch approach to mobile device management will work for you and also for your employees.
- **Do the hard work of prioritizing what *tasks* (not just apps) need to be mobilized.** There's no need to port the entire SAP system or employee portal to a tablet, so don't bother. Instead, pick out the most important tasks, and put just those into the hands of your mobile workforce. Prioritize the tasks based on the impact a mobile device has on the business process and on whether employees will bother to use the app to get something done in the moment of need.⁴
- **Make file sync/share a basic building block for your mobile workforce strategy.** One of the things you will hear from your workforce technology working group is the need for a great file sync/share solution. Be careful not to put security concerns over usability: Otherwise, employees will just ignore it. We are doing a Forrester Wave™ on file sync/share vendors in the first half of 2013 to help you make the best choices for your widespread file sync/share and for more narrowly defined scenarios like secure collaboration with regulators or M&A project teams.
- **Begin the shift to cloud-hosted or cloud-connected applications.** The Roche Group migrated to Google Apps and salesforce.com to mobile-enable its sales reps on tablets. Medical device maker Medtronic used Oracle Web Center to extend its on-premises systems instead. In both cases, the goal is to give field staff a high-performance, device-agnostic solution to content sync and business apps. You will have to do the same with your entire app portfolio, so start now with a new approach to app sourcing and delivery: cloud-first, last-wireless-mile-ready, and device-agnostic.

SUPPLEMENTAL MATERIAL

Methodology

Forrester's Forrsights Workforce Employee Survey, Q4 2012 was fielded to 9,766 information workers located in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, Russia, Singapore, the UK, and the US from small and medium-size business (SMB) and enterprise companies with 20 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during September 2012 and October 2012. Toluna fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for rewards, as well as sweepstakes entries. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those who use a PC or smartphone at work for at least 1 hour per day. Additionally, we set quotas for company size (number of employees) and job function as a means of controlling the data distribution. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

In addition to sampling error, one should bear in mind that the practical difficulties in conducting surveys can introduce error or bias into the finding of opinion polls. Other possible sources of error in polls are probably more serious than theoretical calculations of sampling error. These other potential sources of error include question wording, question ordering, and nonresponse. As with all survey research, it is impossible to quantify the errors that may result from these factors without an experimental control group, so we strongly caution against using the words "margin of error" in reporting any survey data.

These statements conform to the principles of disclosure of the National Council on Public Polls.

ENDNOTES

¹ This forecast of tablet adoption and sales looks at business and personal tablets. See the January 16, 2013, "[Forrester Research World Tablet Adoption Forecast, 2012 to 2017 \(Global\)](#)" forecast.

² Forrester projects that globally, 615 million people will be information workers in 2013, meaning they work part-time or full-time and use a computer or other connected device an hour or more per day for work. Based on that forecast, we calculate the number of global information workers choosing and paying for devices they use for work.

³ Forrester projects that globally, 615 million people will be information workers in 2013, meaning they work part-time or full-time and use a computer or other connected device an hour or more per day for work. Based on that forecast and the data on the desire for the next phone or tablet, we project that 208 million global information workers would like to use an iPhone for work, and 200 million global information workers would like to use a Microsoft Windows tablet for work.

⁴ To take advantage of an app in an employee's or customer's pocket, you have to help them accomplish a task quickly and easily wherever they are whenever they want to complete the task. And that means CIOs and business leaders must redesign business processes where they intersect the physical world. To redesign processes for mobile engagement, focus on task orientation and process atomization. Task orientation helps people take the next step in whatever process scenario they are operating in at the time. Atomization is the decomposition of brittle, hard-wired processes into flexible, actionable, task-oriented artifacts. Evaluate each process based on how a mobile app can take advantage of the user's physical "context" to deliver guidance and how much time the user can save by acting immediately in that context. See the February 4, 2013, "[Mobile Engagement Demands Process Transformation](#)" report.

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« CAROL ITO, client persona representing CIOs

