An IDC InfoBrief, Sponsored by Google | January 2018

Business Use Smartphones:
Choice Matters More Than Ever

IDC
ANALYZE THE FUTURE

Executive Summary:
Productivity and Freedom to Choose

The business use smartphone market has seen tremendous growth over the last decade, and it is heavily influenced by the consumer smartphone market. Enterprise organizations continue to dedicate significant portions of IT spend toward mobility to make their employees more productive, and in turn, employees expect to use the device of their choice.

U.S. Corporate-liable Smartphone Shipments (2011-2017)

Year	2011	2012	2013	2014	2015	2016	2017
Android	32.4%	41.2%	39.2%	37.3%	38.2%	40.6%	41.9%
iOS	28.5%	44.5%	49.1%	55.9%	56.5%	57.3%	57.6%
Others	36.7%	13.0%	10.5%	4.7%	3.8%	1.8%	0.3%
Windows	2.5%	1.3%	1.2%	2.1%	1.5%	0.4%	0.1%
Total	100%	100%	100%	100%	100%	100%	100%

Source: IDC Worldwide Business Use Smartphone Forecast, December 2015-September 2017

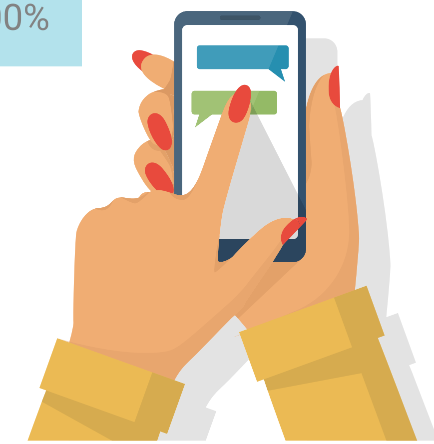
Note: Corporate-liable smartphones include devices that are purchased with company funds and owned by the organization.

U.S. Individual-Liable (BYOD) Smartphone Shipments (2011-2017)

Year	2011	2012	2013	2014	2015	2016	2017
Android	54.5%	52.8%	49.8%	47.3%	47.6%	52.0%	52.6%
iOS	40.5%	46.3%	48.9%	51.1%	50.7%	47.7%	47.3%
Others	4.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Windows	0.8%	0.8%	1.2%	1.6%	1.7%	0.3%	0.1%
Total	100%	100%	100%	100%	100%	100%	100%

Source: IDC Worldwide Business Use Smartphone Forecast, December 2015-September 2017

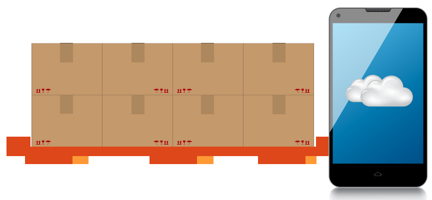
Note: An individual-liable business smartphone is purchased outright and owned by the individual user, brought into the workplace, and used for corporate applications directly linked to the corporation or business including corporate email, corporate PIM, CRM, FFA, and access to corporate intranet (includes SMBs that use consumer email [Yahoo! Mail, Gmail, Comcast mail, etc.] for business purposes). Choose-your-own (CYO) devices can fall under either category.



U.S. Combined Business-Use Smartphone Shipments (2011-2017)

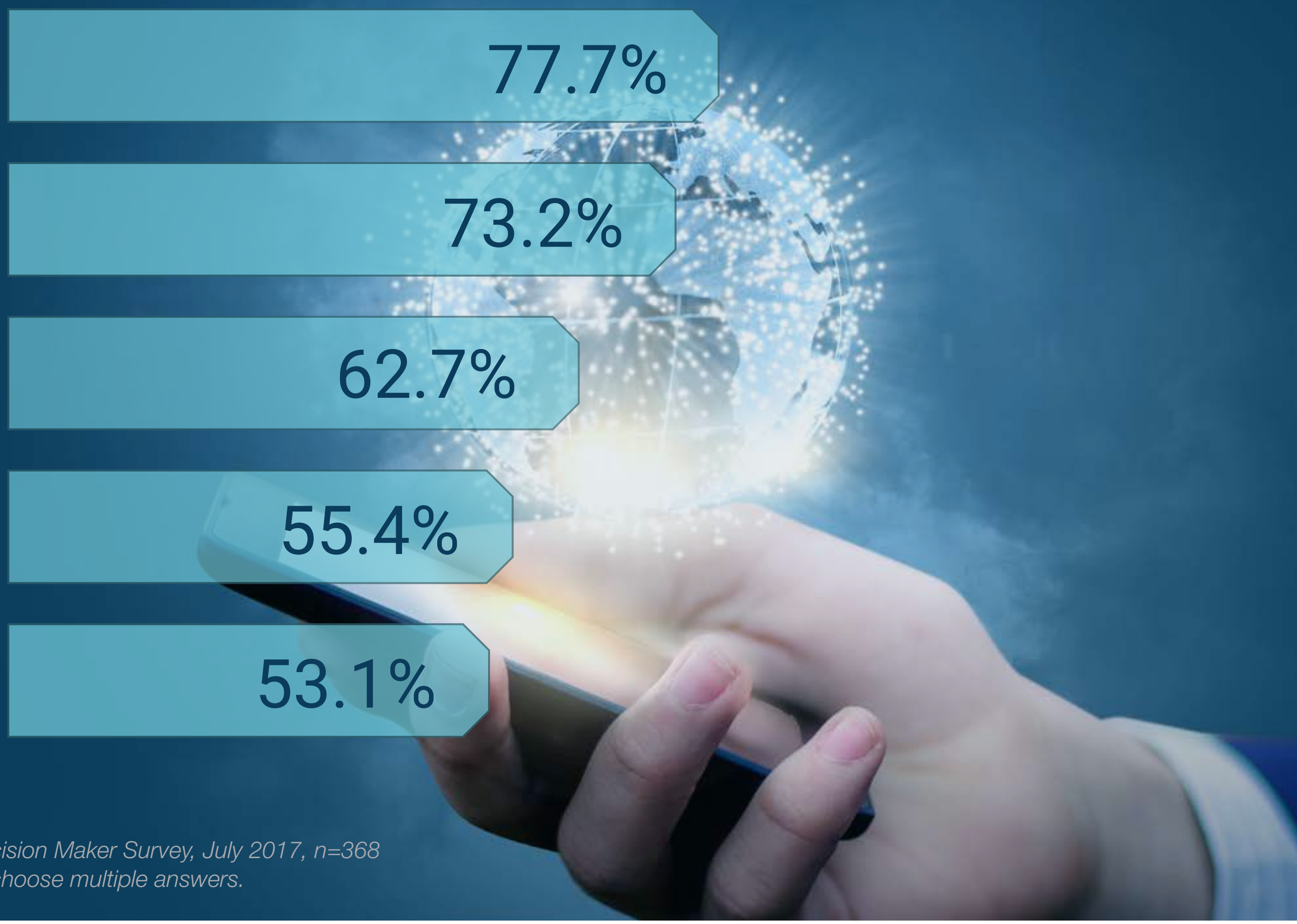
Year	2011	2012	2013	2014	2015	2016	2017
Android	43.6%	48.5%	46.4%	45.2%	45.7%	49.8%	50.5%
iOS	34.6%	45.6%	49.0%	52.1%	51.9%	49.6%	49.3%
Others	20.1%	4.9%	3.4%	1.0%	0.8%	0.3%	0.1%
Windows	1.6%	1.0%	1.2%	1.7%	1.6%	0.3%	0.1%
Total	100%	100%	100%	100%	100%	100%	100%

Source: IDC Worldwide Business Use Smartphone Forecast, December 2015-September 2017



Mobile Hardware and App Management Dominate Enterprise IT Spending Priority

In 2017, enterprise IT decision makers identified the top 5 areas of planned mobility investment as:



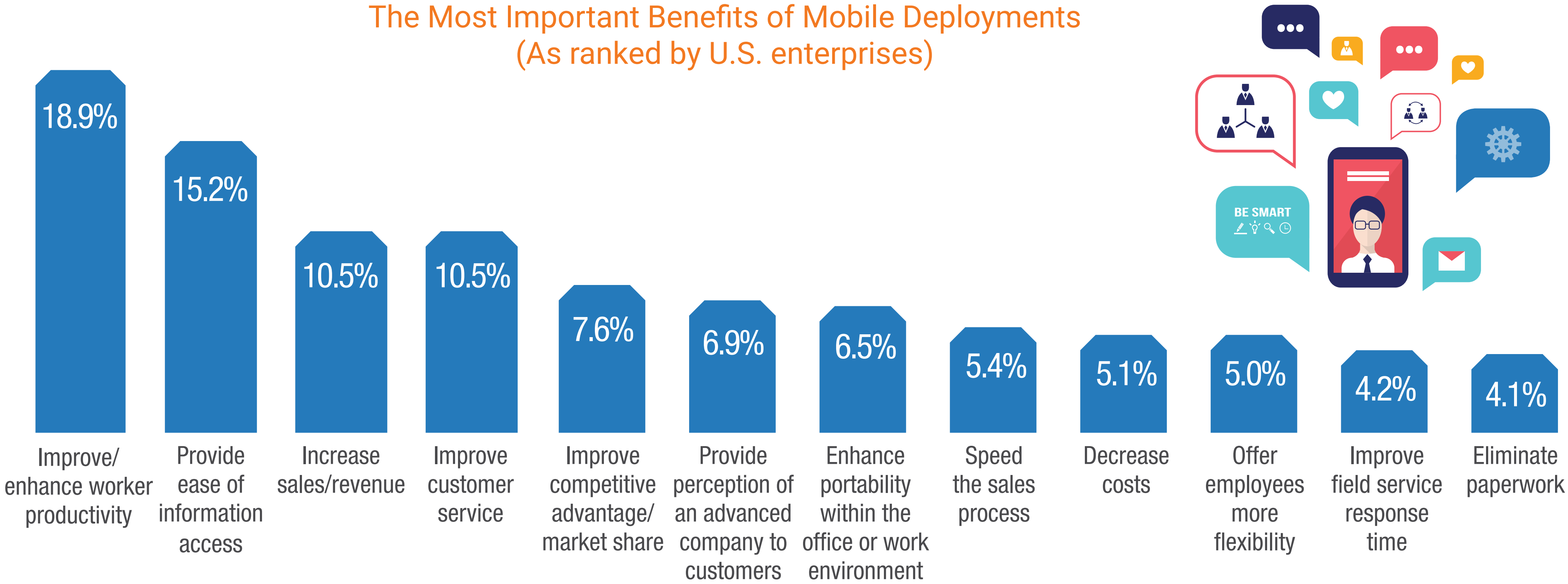
Mobile devices (smartphones and tablets) for employees	77.7%
Mobile application management (app distribution, provisioning/de-provisioning, configuration, enterprise app stores)	73.2%
Mobile application security (containers, SDKs, app wrappers)	62.7%
Enterprise mobility management (EMM) (software suites with mobile device, application, and content management capabilities in one product)	55.4%
Unified endpoint/device management (mobile endpoint management [smartphone/tablets] with traditional PC endpoints [Window/MacOS laptops, PCs, workstations, etc.])	53.1%

Source: IDC U.S. Enterprise Mobility Decision Maker Survey, July 2017, n=368
Note: Respondents could choose multiple answers.

Increased Worker Productivity Is What Drives Mobile Investment

Worker productivity and access to information are the driving forces behind mobility deployments, and ultimately future mobility investment.

The Most Important Benefits of Mobile Deployments
(As ranked by U.S. enterprises)

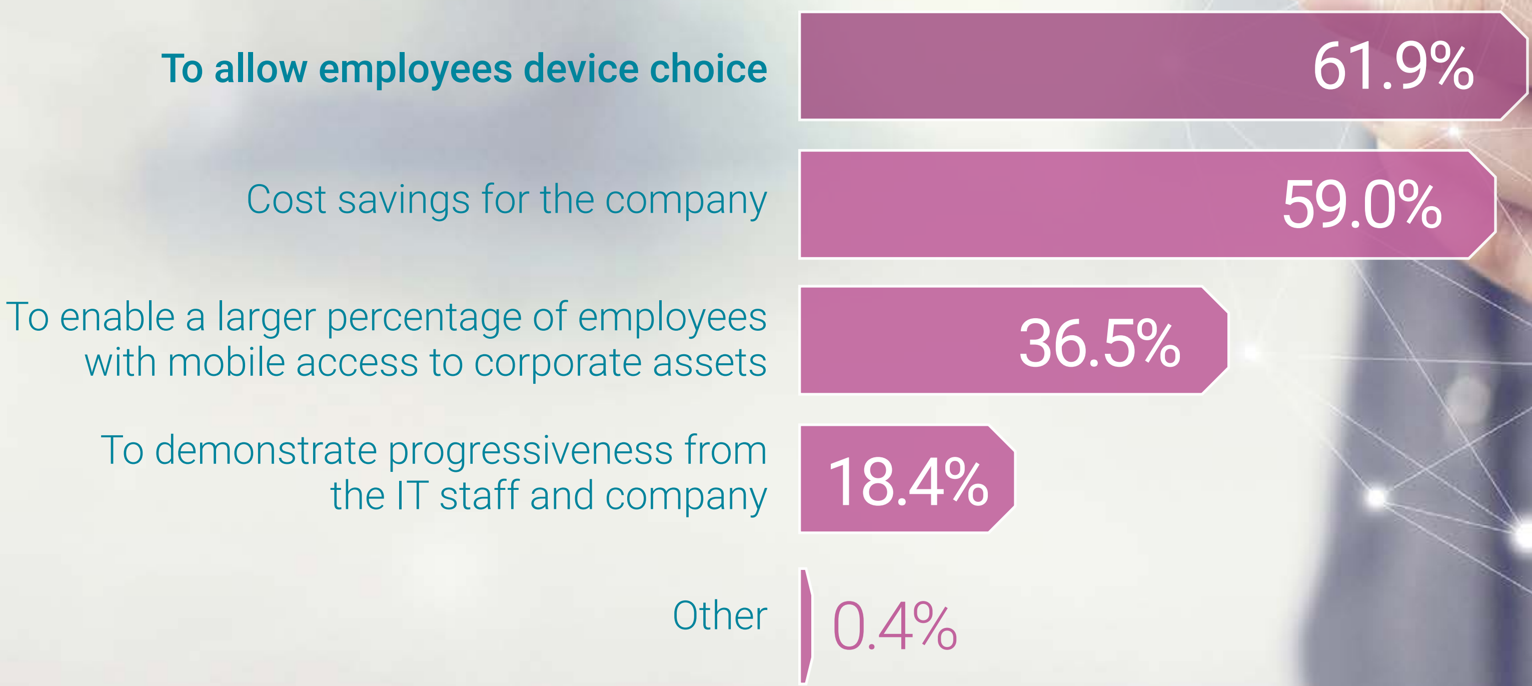


Source: IDC U.S. Enterprise Mobility Decision Maker Survey, July 2017, n=502
Note: Respondents could choose multiple answers.

Employee Choice Outranks Cost Savings

U.S. enterprise organizations believe that allowing employees to choose what mobile device they use for work is more important than reducing mobility costs for the company, even if by a low margin.

Reasons enterprise organizations adopt employee-liable device models:



Source: IDC U.S. Enterprise Mobility Decision Maker Survey, July 2017, n=457
Note: Respondents could choose multiple answers.

Conclusion: Enterprise Mobile Solutions Should Prioritize User Experience

The impact of mobility on global business markets is nothing short of revolutionary. Enterprise organizations will continue to invest in mobile as a core pillar of future business strategies, and mobile workers will demand a say in what devices they use in their personal and professional lives.

IDC offers the following recommendations for organizations looking at mobile hardware and software solutions:

- Engage with employees regarding mobility solutions and listen to feedback
- User experience will make or break a mobile deployment
- Define key stakeholders
- Communicate device and security policies to employees and educate across the entire organization
- Phased rollouts reduce friction, especially when deployments disrupt established workflows
- Improve on marked success
- Define, enforce, and regularly revisit/update minimum device requirements
- Research and test mobile solutions with end users in the environment the solution will be used in

Methodology

The data presented in this InfoBrief comes from IDC's global reports and web-based surveys, including:

- IDC Worldwide Business Use Smartphone Shipment Forecast, 2017-2021, September 2017
- IDC U.S. Enterprise Mobility Decision Maker Survey, July 2017; n=502