

BT and Cisco 'Beyond Your Device' Research



Involving more than 2,000 interviews across 13 regions and 9 sectors, the BT and Cisco 'Beyond Your Device' research compares and contrasts attitudes to bring your own device (BYOD) among IT decision makers and office workers in large organisations across public and key commercial sectors.

With networks 'creaking' under the data demands of smart devices, the research highlights challenges and obstacles associated with BYOD, but also the opportunities and productivity gains for organisations in overcoming them. Crucially, it reveals that BYOD in its many forms is about much more than simply cool devices and a mobile contract. Organisations need to consider all of the elements – device compatibility, security, Wi-Fi, network, application performance and their people – if they want to achieve productivity benefits and meet the expectations of their employees without putting performance at risk.

Rise in pressure, drop in performance

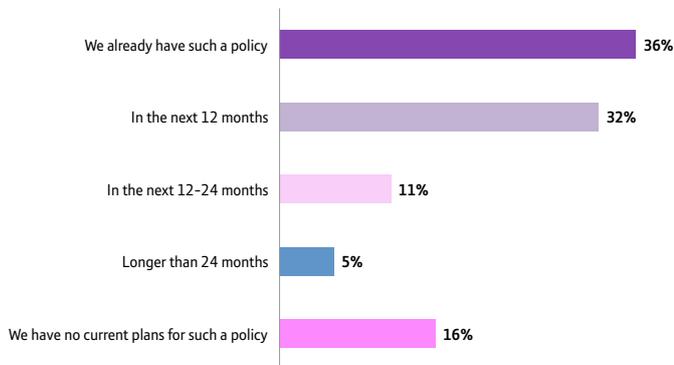
- Exponential growth in the use of smart devices has led to significant increases in bandwidth demand across 84 per cent of organisations surveyed globally.
- More than half (56 per cent) of IT managers have also noticed a performance decline in some applications, which undermines the productivity gains promised by smart devices.
- Almost half (46 per cent) of workers with Wi-Fi access in their office have experienced delays logging on or getting into an application, while 39 per cent have noticed they are running more slowly now than before.
- Over three quarters (76 per cent) of employees believe their organisation needs to take further steps to fulfil the potential productivity gains that smart devices present. This increases to 97 per cent in India and 96 per cent in China but drops to 49 per cent in the UK and 54 per cent in France and Germany.
- Increased use of cloud solutions (33 per cent), greater use of specialist software (32 per cent) and greater support for smart device users (32 per cent) are the actions deemed most useful by employees.

Wi-Fi key to productivity

- Ubiquitous Wi-Fi is key to the development of BYOD but 45 per cent of employees still don't have wireless access to their corporate networks. This figure increases to 60 per cent in Benelux and 75 per cent in France, but drops to 26 per cent in China and 25 per cent in India.
- Of those workers currently without Wi-Fi access in their organisation, over two thirds (68 per cent) believe it would have a positive impact on their work, for example it could make them more efficient and productive (31 per cent), help them work more flexibly (30 per cent) and stay in-touch (26 per cent).

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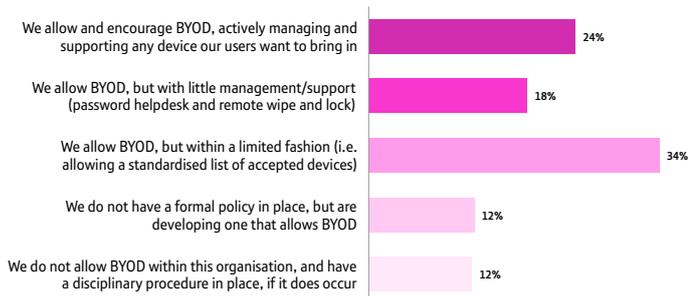
When will your company have a policy that allows employees to use their personally-owned device for work?



The progress of BYOD

- 48 per cent of employees (down from 60 per cent in 2012) say their employers permit them to connect personally-owned devices to the corporate network. This drops to 32 per cent in the UK but increases to 71 per cent in India and 88 per cent in China.
- Of the employees who are not allowed to use their own devices in a personal context, 72 per cent think that there would be benefits in doing so and 46 per cent would like to do so, with a further 14 per cent saying they might like to do so in the future.
- The number of organisations with a formal policy in place has also decreased slightly from 40 per cent in 2012 to 36 per cent and there are interesting changes within countries.
- Organisations in the USA (49 per cent), India (46 per cent) and Germany (46 per cent) are most likely to have formal BYOD policies in place. This compares to China (53 per cent), Brazil (51 per cent) and the USA (50 per cent) in 2012.
- Organisations in France (25 per cent), UAE (20 per cent) and Turkey (14 per cent) are least likely to have formal BYOD policies in place. This compares to Germany (34 per cent), UK (31 per cent) and Italy (25 per cent) in 2012.

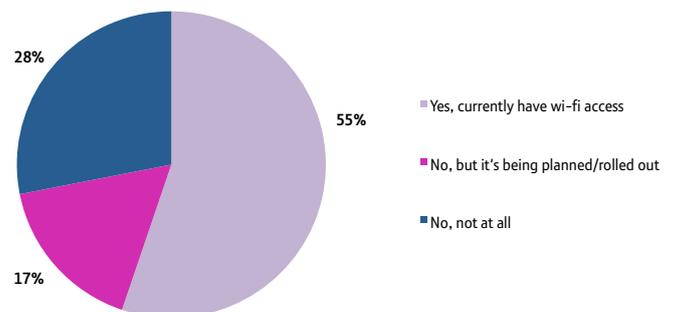
Which of the following best describes the sort of BYOD policy your organisation uses?



Benefits of BYOD

- There is overwhelming positivity towards BYOD among IT managers and employees.
- 84 per cent of IT managers think that adopting a BYOD policy confers a competitive advantage, with 31 per cent saying a significant advantage. IT managers in China (97 per cent) and India (93 per cent) are the most excited about the competitive advantage that comes with a BYOD policy compared to their colleagues in Germany (74 per cent) and Turkey (70 per cent).
- IT managers with a BYOD policy in place most commonly hope that it will increase employee productivity (64 per cent).
- Employees who use their personal devices for work (whether permitted to or not) are using the facility in a wide context (with figures similar to 2012):
 - Reading work emails (86 per cent)
 - Accessing the internet for work purposes (81 per cent)
 - Accessing work files from company servers (59 per cent)
 - Using public apps (such as Twitter) for work purposes (51 per cent)

Do you or will you have Wi-Fi access in your office?



Policy confusion

- Despite overwhelming positivity towards BYOD, the research also highlights a lack of progress in adopting or articulating a consistent policy across wired, wireless and VPN with the sorts of policies in place varying considerably.
- Of the organisations surveyed that have a BYOD policy, 34 per cent only allow BYOD to a limited degree (e.g. only some devices allowed); 24 per cent actively encourage and support BYOD, whatever the device; 18 per cent allow BYOD, but with limited support/management; 12 per cent are currently developing their policy to allow BYOD; and 12 per cent have a policy that excludes BYOD, with disciplinary measures if the policy is broken.

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Addressing security concerns

- The main concerns around developing a policy (for those who have done it and those that envisage doing so) are employees leaving the company with insider knowledge (47 per cent), theft/loss of devices (44 per cent), lack of control of the devices (42 per cent) and unauthorised data distribution (42 per cent).
- Two fifths of IT managers are worried that a BYOD policy could impact or threaten their business’s compliance obligations.
- However, the past year has seen IT managers relax a little, with just 40 per cent citing concerns over compliance now compared to 47 per cent a year ago.
- A third of IT managers (33 per cent) can tell immediately if someone is using an unauthorised device on the system and 71 per cent of them are able to identify the user. 26 per cent are able to tell if an authorised user is using their device in an unauthorised way.

Risk remains top of mind

- Security risks (such as malware, viruses, etc.) are the most common issues for personally owned devices – 49 per cent of organisations say that this has prevented them from adopting BYOD in the past, and will continue to prevent adoption in the future.
- This is for good reason, as 82 per cent of those who allow BYOD say that they have had to deal with security risks, such as malware or viruses, as a result of their employees using personally owned devices, though 18 per cent are confident that they will not have to deal with these in the future.

Growing trust?

- Trust in employees continues to play a large role in whether companies permit BYOD.
- Just over a quarter (26 per cent) of IT managers think that all users understand their access/permissions related to their mobile devices. This figure has increased from 19 per cent in 2012 pointing to an increase in confidence.
- Yet only 26 per cent of employees that use a personal device for work recognise that this presents a risk to company security suggesting IT managers are nervous with some justification.

Striking a balance

- 39 per cent of employees agree that “The IT department imposes rules and regulations that restrict the most innovative use of new technologies” (40 per cent in 2012).
- 66 per cent are aware of security/data protection policies their organisation has put in place regarding personal devices for work use (unchanged from 2012).

- Of those who are monitored while using their personal devices, 42 per cent are concerned about the fact that their employer monitors them (46 per cent in 2012).
- 47 per cent say that having company firewalls or software loaded onto their personal devices would discourage them from wanting to use them in a work context (unchanged from 2012).

BYOD is heralding a “new model of IT”

- More than 3 in 5 IT decision makers (61 per cent) believe the rise of BYOD heralds the move to a “new model of IT”, where barriers between the individual and workplace dissolve and everything is linked together by the corporate network. This compares to 57 per cent in 2012.

Sector perspectives

- Organisations in the FMCG (45 per cent) and pharmaceuticals (44 per cent) sectors are most likely to have a formal BYOD policy in place. This compares to 27 per cent in government and 28 per cent in healthcare.
- IT managers in the FMCG (92 per cent) and retail (90 per cent) sectors are most excited about the competitive advantage that comes with a BYOD policy.
- Almost half (47 per cent) of IT managers in the financial services sector are concerned that a BYOD policy could impact or threaten their business’s compliance obligations. This compares to 30 per cent in the FMCG sector.
- IT managers in the financial services sector have the greatest vigilance on their corporate network. 79 per cent can tell if someone is using an unauthorised device on their system and, of this number, 77 per cent can identify the user. This compares to 75 per cent in government and 63 per cent in the pharmaceuticals sector.
- 59 per cent of office workers in the government sector don’t have wireless access to their networks. This drops to 37 per cent in retail and 33 per cent in FMCG.
- 85 per cent of office workers in the pharmaceuticals sector believe their organisation needs to take further steps to fulfil the potential productivity gains that smart devices present. This compares to 80 per cent in retail and 78 per cent in the financial services sector.
- Almost three quarters (74 per cent) of IT decision makers in the FMCG sector believe the rise of BYOD heralds a move to a “new model of IT”. This compares to 42 per cent in government.