



2013 Trustworthy Computing Survey, Part 1: Global Consumerization of IT Goes Mainstream: Most Companies Now Allow BYOD and Consumer Apps

Computing Usage and Attitudes among IT Professionals



July 2013

Global Consumerization of IT Goes Mainstream: Most Companies Now Allow BYOD and Consumer Apps – Overview

Background

comScore conducted the Trust in Computing survey for Microsoft to measure customers' current level of trust in technology products and services in terms of security and privacy; and to identify where concerns may be slowing down technology adoption. comScore surveyed 4,500 consumers, IT professionals, and developers in Brazil, Canada, China, Germany, India, Japan, Russia, the United Kingdom, and the United States.

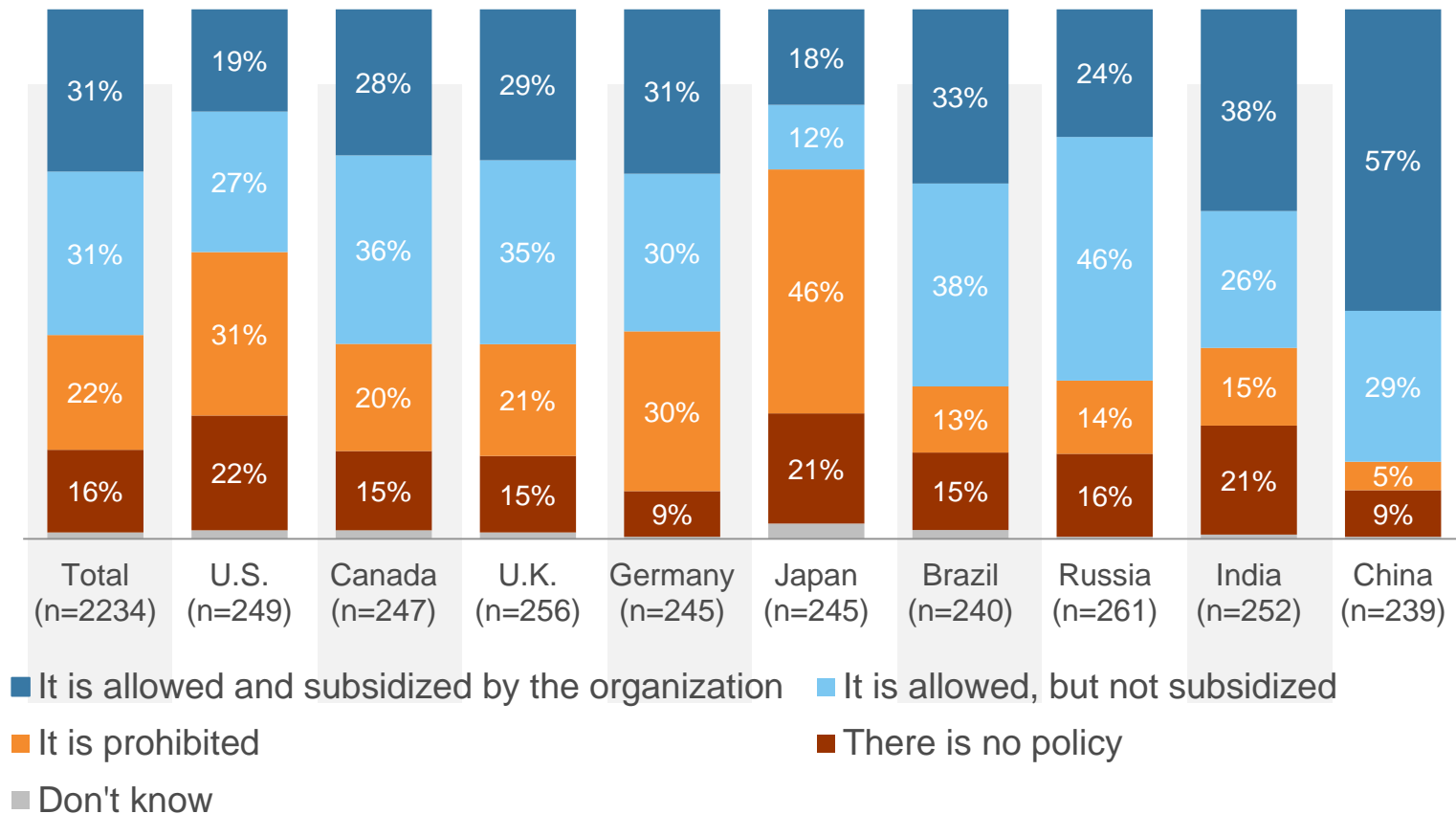
Key Findings –

- Support for BYOD is increasing, with 78% of organizations allowing employees to bring their own PCs or laptops to the office for work purposes, and 31% subsidizing purchases of employee-owned laptop/PCs for work use. Chinese companies were the most likely (86%) to allow BYOD, and Japanese companies the least likely (30%).
- However, large organizations are less likely to allow the use of employee-owned PCs/laptops than are smaller businesses. Twenty-seven percent of large organizations prohibit employees from buying their own laptop/PC compared to 16% of smaller organizations.
- The increase in BYOD is resulting in more organizations allowing employees (50% worldwide) to 'customize' their machines.
- Worldwide, 50% of companies provide employees with a mobile device, 25% allow employee to bring their own mobile devices, and 26% do not allow them.
- Usage of consumer applications in lieu of enterprise applications is increasing across countries, with 59% allowing or requiring it.

BYOD is allowed in most countries studied as more employers are allowing employees to use their own PCs for work.

- Support for BYOD is increasing through subsidizing purchases of employee-owned laptop/PCs for work use.

Organization Policy Towards Personal Devices



Note: significant differences between countries only indicated when significantly higher than 3 or more countries at a 95% level.

However, large organizations are less likely to allow the use of employee-owned PCs/laptops than are smaller businesses.

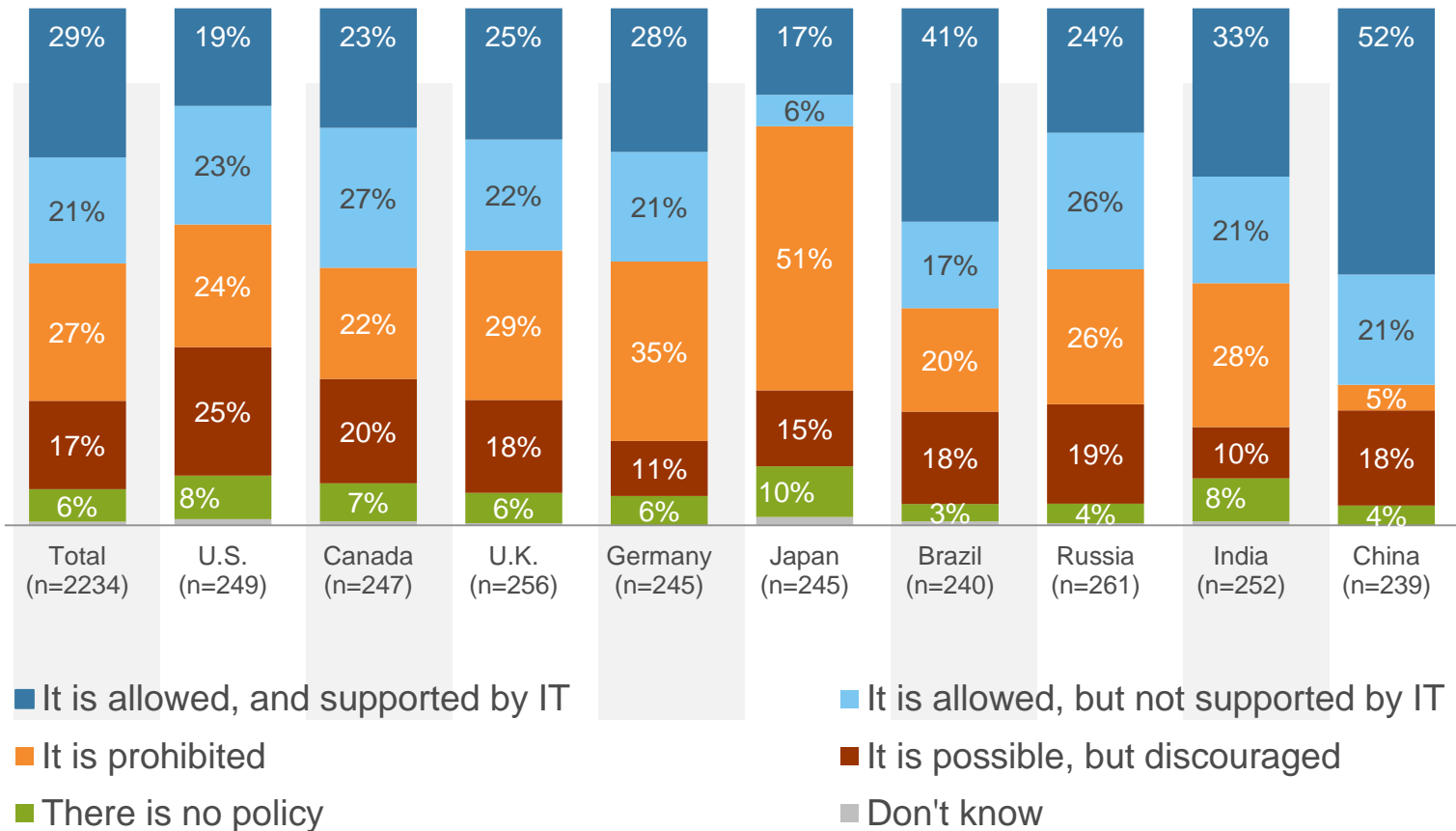
- Small and mid-size businesses are less likely than larger organizations to have a policy.

Organization Policy Towards Personal Devices

		By Organization Size																			
		Total		U.S.		Canada		U.K.		Germany		Japan		Brazil		Russia		India		China	
		SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT
n=		1158	1031	130	110	125	118	128	122	125	115	133	106	129	109	144	113	120	123	124	115
It is allowed and subsidized by the organization		31%	31%	15%	25%	28%	27%	34%	23%	26%	37%	14%	25%	36%	30%	27%	20%	45%	32%	54%	60%
It is allowed, but not subsidized		32%	30%	29%	26%	38%	35%	38%	31%	33%	27%	20%	4%	39%	39%	44%	50%	27%	24%	26%	31%
It is prohibited		16%	27%	24%	37%	14%	27%	12%	32%	29%	30%	32%	62%	7%	19%	12%	16%	12%	19%	7%	4%
There is no policy		20%	11%	32%	11%	20%	9%	16%	13%	11%	6%	34%	6%	17%	11%	17%	12%	16%	25%	12%	5%
Don't know		1%	1%	1%	2%	1%	2%	1%	1%	1%	-	1%	4%	2%	1%	-	1%	1%	-	1%	-

Increasing BYOD is resulting in more organizations allowing employees to 'customize' their machines.

Organization Policy Towards Employees Installing their own Applications



Note: significant differences between countries only indicated when significantly higher than 3 or more countries at a 95% level.

Large organizations are more likely to prohibit employees from installing their own software or personal data on work PCs than are smaller ones.

Organization Policy Towards Employees Installing their own Applications

		By Organization Size																			
		Total		U.S.		Canada		U.K.		Germany		Japan		Brazil		Russia		India		China	
		SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT
n=		1158	1031	130	110	125	118	128	122	125	115	133	106	129	109	144	113	120	123	124	115
It is allowed and supported by IT		30%	29%	22%	17%	23%	23%	25%	27%	24%	33%	14%	22%	43%	39%	29%	20%	43%	24%	45%	58%
It is allowed, but not supported by IT		21%	21%	25%	21%	30%	25%	22%	21%	22%	21%	6%	7%	16%	18%	26%	28%	20%	22%	21%	22%
It is prohibited		22%	31%	17%	31%	18%	24%	26%	33%	37%	31%	39%	65%	17%	23%	21%	32%	18%	38%	8%	2%
It is possible, but discouraged		18%	16%	22%	27%	16%	25%	18%	17%	10%	11%	22%	5%	19%	17%	22%	16%	9%	11%	21%	16%
There is no policy		9%	3%	14%	3%	13%	2%	9%	3%	8%	4%	18%	-	5%	2%	4%	4%	9%	6%	5%	3%
Don't know		<1%	1%	-	1%	-	2%	-	-	-	-	2%	2%	-	1%	-	1%	1%	-	-	-

Companies have a wide variety of policies around employees' mobile device ownership and management.

- Only China has a clear preference for one policy: employee owned, company managed devices.

	Organization's Policy Towards Mobile Device Use									
	Total	U.S.	Canada	U.K.	Germany	Japan	Brazil	Russia	India	China
n=	2234	249	247	256	245	245	240	261	252	239
		a	b	c	d	e	f	g	h	i
Employees are provided an organization supplied and organization managed device	27%	30%	28%	27%	31%	23%	26%	18%	27%	37%
Employee mobile devices are not permitted to access corporate resources	26%	15%	22%	24%	32%	41%	31%	35%	29%	5%
Employees use their own device for work, that the organization manages	25%	21%	19%	20%	23%	11%	23%	19%	24%	63%
Employees use their own device for work, that the organization does not manage	24%	30%	31%	19%	24%	12%	28%	25%	27%	22%
Employees are provided an organization supplied device that they manage themselves	23%	24%	19%	31%	28%	16%	24%	22%	24%	18%
There is no mobile device policy for work email and applications	8%	15%	7%	6%	8%	14%	7%	11%	6%	2%

Note: significant differences between countries only indicated when significantly higher than 3 or more countries at a 95% level.

Q44. Please indicate your organization's mobile device policy for work email and applications. Please select all that apply. Base: IT Pros

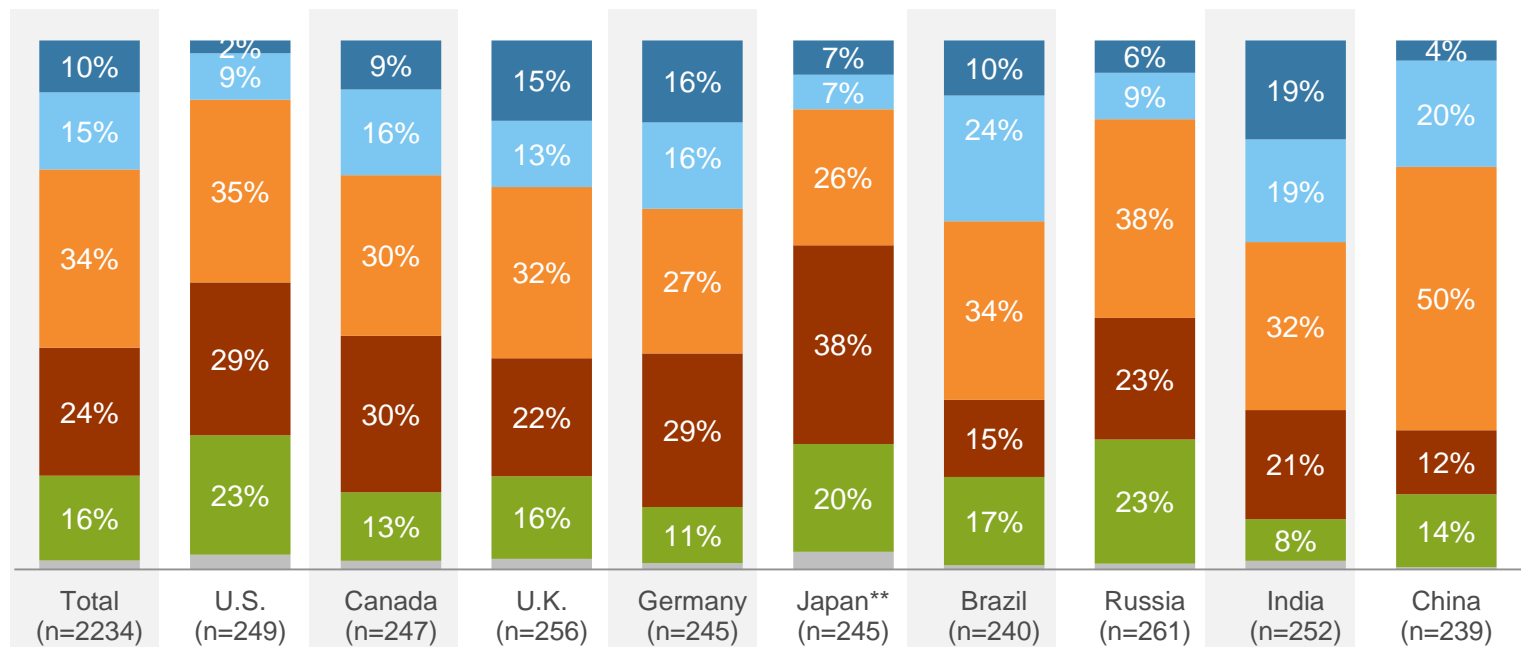
Across countries, larger organizations are more likely to manage mobile devices than are small-medium business.

Organization Policies Towards Installing Own Applications Or Personal Data On PC																				
	Total		U.S.		Canada		U.K.		Germany		Japan		Brazil		Russia		India		China	
	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT
n=	1158	1031	130	110	125	118	128	122	125	115	133	106	129	109	144	113	120	123	124	115
Employees are provided an organization supplied and organization managed device	21%	36%	22%	41%	19%	38%	21%	35%	23%	39%	11%	38%	22%	31%	18%	19%	27%	29%	23%	52%
Employee mobile devices are not permitted to access corporate resources	25%	28%	11%	18%	17%	26%	25%	24%	27%	39%	37%	46%	30%	32%	38%	34%	31%	29%	6%	5%
Employees use their own device for work, that the organization manages	23%	27%	15%	30%	21%	19%	23%	17%	22%	25%	9%	13%	20%	28%	19%	20%	26%	21%	55%	71%
Employees use their own device for work, that the organization does not manage	27%	22%	33%	26%	35%	26%	20%	16%	25%	23%	12%	12%	31%	25%	29%	20%	28%	29%	27%	17%
Employees are provided an organization supplied device that they manage themselves	20%	26%	20%	27%	14%	24%	30%	33%	22%	33%	11%	22%	19%	30%	21%	24%	22%	29%	21%	15%
There is no mobile device policy for work email and applications	12%	5%	22%	7%	12%	3%	7%	4%	10%	5%	26%	1%	9%	5%	12%	9%	4%	7%	2%	2%

Usage of consumer applications in lieu of enterprise applications is increasing across countries.

- Usage of consumer applications instead of enterprise ones is required and/or encouraged by a greater percent of organizations in Canada, the UK, Germany, and Brazil than other countries surveyed. It is mainly 'tolerated' in China.

Organization Policies Towards Consumer Applications In Lieu Of Enterprise Applications



■ It is required ■ It is encouraged ■ It is allowed ■ It is prohibited ■ There is no policy ■ Don't know

Note: significant differences between countries only indicated when significantly higher than 3 or more countries at a 95% level.

Q45. Please indicate your organization's policy on employees using consumer (e.g., online, free, trial, open-source, low-cost) applications in lieu of enterprise applications.
Base: IT Pros

Usage of consumer applications in lieu of enterprise applications is more often prohibited in enterprise-level organizations than in smaller organizations.

Organization Policies Towards Consumer Applications In Lieu Of Enterprise Applications

		By Organization Size																			
		Total		U.S.		Canada		U.K.		Germany		Japan		Brazil		Russia		India		China	
		SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT	SMB	ENT
n=		1158	1031	130	110	125	118	128	122	125	115	133	106	129	109	144	113	120	123	124	115
It is required		10%	10%	2%	3%	12%	7%	16%	15%	12%	20%	2%	12%	12%	9%	7%	5%	23%	15%	2%	5%
It is encouraged		16%	14%	9%	10%	20%	13%	13%	12%	18%	15%	3%	11%	26%	22%	9%	9%	25%	15%	21%	19%
It is allowed		35%	32%	35%	36%	31%	30%	34%	31%	28%	27%	32%	17%	39%	28%	41%	32%	28%	35%	45%	55%
It is prohibited		18%	30%	22%	36%	21%	39%	16%	29%	28%	30%	26%	52%	7%	24%	20%	27%	15%	26%	11%	13%
There is no policy		20%	12%	32%	13%	15%	10%	19%	12%	12%	8%	32%	6%	17%	15%	23%	25%	8%	8%	19%	8%
Don't know		1%	2%	2%	4%	1%	2%	2%	2%	2%	1%	4%	2%	-	2%	-	3%	1%	1%	1%	-

Margin of Error

The sample size and margin of error of each group in this report is provided in the table below.

	Consumers		IT Professionals		Developers	
	n=	Margin of Error	n=	Margin of Error	n=	Margin of Error
United States	212	+/- 6.7 points	249	+/- 6.2 points	53	+/-13.5 points
Canada	212	+/- 6.7 points	247	+/- 6.2 points	55	+/-13.2 points
United Kingdom	212	+/- 6.7 points	256	+/- 6.1 points	55	+/-13.2 points
Germany	212	+/- 6.7 points	245	+/- 6.3 points	54	+/-13.3 points
Japan	212	+/- 6.7 points	245	+/- 6.3 points	55	+/-13.2 points
Brazil	212	+/- 6.7 points	240	+/- 6.3 points	55	+/-13.2 points
Russia	212	+/- 6.7 points	261	+/- 6.1 points	55	+/-13.2 points
India	212	+/- 6.7 points	252	+/- 6.2 points	55	+/-13.2 points
China	212	+/- 6.7 points	239	+/- 6.3 points	55	+/-13.2 points

Besides sampling error, all sample surveys and polls may be subject to several additional sources of error that cannot be calculated, including, but not limited to coverage error, error associated with non-response, error associated with question wording and response options, and post-survey weighting and adjustments. It should be noted that the sample used in this study is based on those who initially self-selected for participation, therefore no complete estimate of sampling error can be calculated.



Comparing Attitudinal Data Across Countries

The following cultural dimensions may influence survey responses and should be taken into consideration when comparing attitudinal data.

Power Distance

- Cultures with high power distance are those with deference to people in positions of higher status or authority (e.g., surveyor), and respondents may be more likely to agree with statements.
- Low power distance cultures are more willing to disagree with those in positions of higher status or authority, and consequently may be more willing to disagree in surveys.

Individualism vs. Collectivism

- Ratings in individualistic cultures may gravitate toward the ends of a rating scale, with strong agreement or disagreement.
- Ratings in collectivist cultures may gravitate toward the middle of a ratings scale.

Uncertainty Avoidance

- Cultures with low uncertainty avoidance may be more likely to agree with statements.