Business Use Smartphones: Choice Matters More Than Ever
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.
### Worldwide Corporate-liable Smartphone Shipments (2011-2017)

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Android</strong></td>
<td>32.2%</td>
<td>50.5%</td>
<td>57.6%</td>
<td>59.3%</td>
<td>59.7%</td>
<td>65.3%</td>
<td>68.0%</td>
</tr>
<tr>
<td><strong>iOS</strong></td>
<td>22.5%</td>
<td>29.3%</td>
<td>28.3%</td>
<td>31.4%</td>
<td>34.0%</td>
<td>32.5%</td>
<td>31.5%</td>
</tr>
<tr>
<td><strong>Others</strong></td>
<td>43.8%</td>
<td>17.5%</td>
<td>9.1%</td>
<td>4.1%</td>
<td>2.4%</td>
<td>0.9%</td>
<td>0.3%</td>
</tr>
<tr>
<td><strong>Windows</strong></td>
<td>1.5%</td>
<td>2.7%</td>
<td>5.0%</td>
<td>5.2%</td>
<td>3.8%</td>
<td>1.3%</td>
<td>0.1%</td>
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<tr>
<td><strong>Total</strong></td>
<td>100%</td>
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</tr>
</tbody>
</table>

*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.*

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<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Android</td>
<td>40.5%</td>
<td>63.1%</td>
<td>78.8%</td>
<td>80.4%</td>
<td>78.1%</td>
<td>80.9%</td>
<td>81.2%</td>
</tr>
<tr>
<td>iOS</td>
<td>20.6%</td>
<td>22.7%</td>
<td>17.0%</td>
<td>17.2%</td>
<td>20.4%</td>
<td>18.8%</td>
<td>18.8%</td>
</tr>
<tr>
<td>Others</td>
<td>38.4%</td>
<td>12.8%</td>
<td>2.2%</td>
<td>0.7</td>
<td>0.3%</td>
<td>0.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Windows</td>
<td>0.4%</td>
<td>1.3%</td>
<td>1.9%</td>
<td>1.7%</td>
<td>1.3%</td>
<td>0.2%</td>
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<tr>
<td>Total</td>
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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 (also 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.

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<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Android</td>
<td>36.4%</td>
<td>57.8%</td>
<td>72.0%</td>
<td>75.1%</td>
<td>73.4%</td>
<td>77.1%</td>
<td>77.9%</td>
</tr>
<tr>
<td>iOS</td>
<td>21.6%</td>
<td>25.5%</td>
<td>20.6%</td>
<td>20.8%</td>
<td>23.8%</td>
<td>22.2%</td>
<td>22.0%</td>
</tr>
<tr>
<td>Others</td>
<td>41.1%</td>
<td>14.8%</td>
<td>4.4%</td>
<td>1.6%</td>
<td>0.8%</td>
<td>0.3%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Windows</td>
<td>1.0%</td>
<td>1.9%</td>
<td>2.9%</td>
<td>2.6%</td>
<td>1.9%</td>
<td>0.5%</td>
<td>0.1%</td>
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<tr>
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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 [Windows/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:

- To allow employees device choice: 61.9%
- Cost savings for the company: 59.0%
- To enable a larger percentage of employees with mobile access to corporate assets: 36.5%
- To demonstrate progressiveness from the IT staff and company: 18.4%
- Other: 0.4%

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
- 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
- Define key stakeholders
- 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