Going Custom: Enterprise Mobile Application Survey Results

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Agenda

- Methodology
- Highlights
  - Custom Apps by Company Size and Device
  - Development Strategies
  - App Usage
  - App Roles
  - App Functions
  - App Platforms
  - App Deployment
- Key Takeaways

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Methodology

- TECHnalysis Research conducted an online survey of 485 US-based IT personnel in November 2014 to understand their plans to build and deploy custom applications for mobile devices (tablets and smartphones) as well as PCs
  - Respondent had to be involved with their company's development of custom mobile applications in order to qualify to take the survey
    - Specific qualification question was: "Are you in your company's IT Dept. and responsible for the creation, development or administration of custom applications for your company's employees that can be run on either smartphones, tablets or PCs?"
  - Respondents came from large businesses of 1,000+ employees (200), medium-sized businesses of 100-999 employees (201), and small businesses of 10-99 employees (84)
  - Respondents came from a wide variety of different industries
    - Particularly strong presence from Technology, Manufacturing, Professional Services and Financial industries

	Small (10-99 Employees)	Medium (100-999 Employees)	Large (1,000+ Employees)	Total
Respondents	84	201	200	485

Who's Building Custom Apps for Mobile Devices?

98%

78%

81%

96%	97%	99%

62%	84%	78%

71%	85%	82%

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% of companies, total and by company size, building custom apps on each device

Who Are Companies Using to Build Their Custom Mobile Apps?

Development

Internal	External
59%	41%

| Internal	External
52%	48%

Internal	External
51%	49%

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% of companies doing custom app development
internally or externally on each device

How Many People Are Using Custom Mobile Apps?

71%

37%

43%

% of total employees using custom apps on each device

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Who's Using Custom Mobile Apps?

Everyone in Company	71%
Top-Level Execs	27%
Outside Sales	26%
Specific Depts.	23%
Line of Business	21%

Outside Sales	53%
Outside Sales	39%
Everyone in Company	37%
Specific Depts.	35%
Line of Business	24%

Top-Level Execs	47%
Everyone in Company	43%
Outside Sales	42%
Specific Depts.	27%
Line of Business	27%
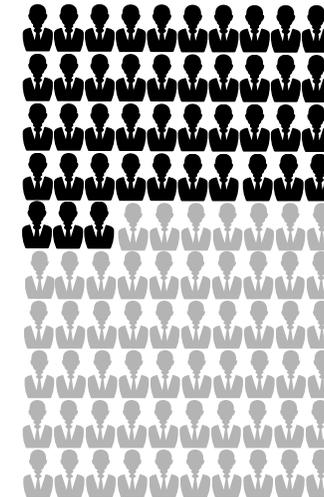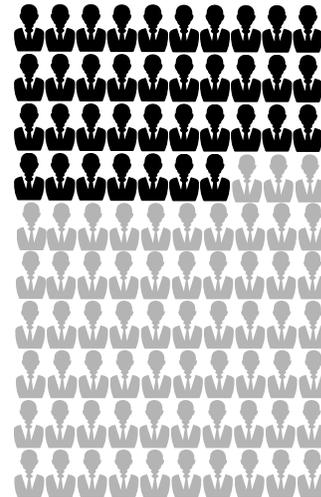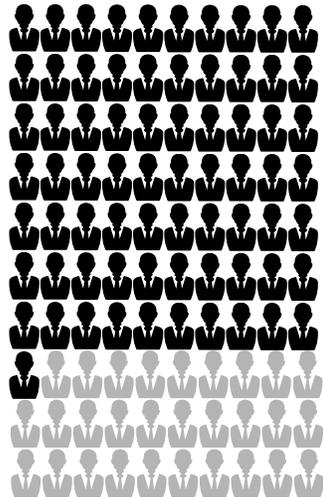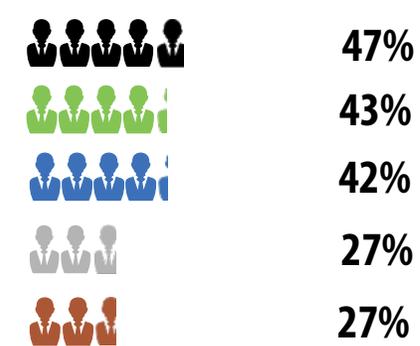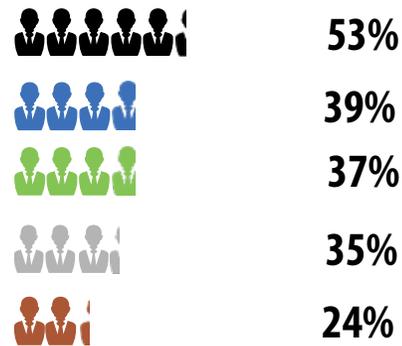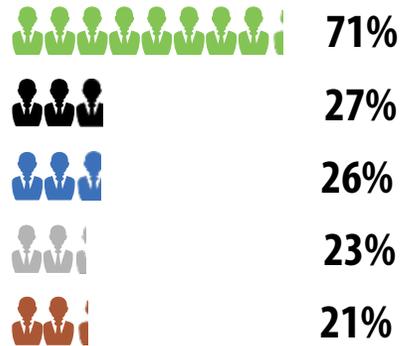
Everyone in Company   Top-Level Execs   Outside Sales   Specific Depts.   Line of Business

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% of employees by type using custom apps on each device

What Types of Custom Apps Are Being Built?

Laptop:
- Browser-Based Apps 72%
- Native Apps 57%
- VDI Apps 60%
- HTML5 Apps 61%

Tablet:
- Native Apps 63%
- VDI Apps 39%
- Browser-Based Apps 59%
- HTML5 Apps 51%

Smaller Tablet:
- Native Apps 66%
- VDI Apps 29%
- Browser-Based Apps 53%
- HTML5 Apps 49%

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% of app types built on each device
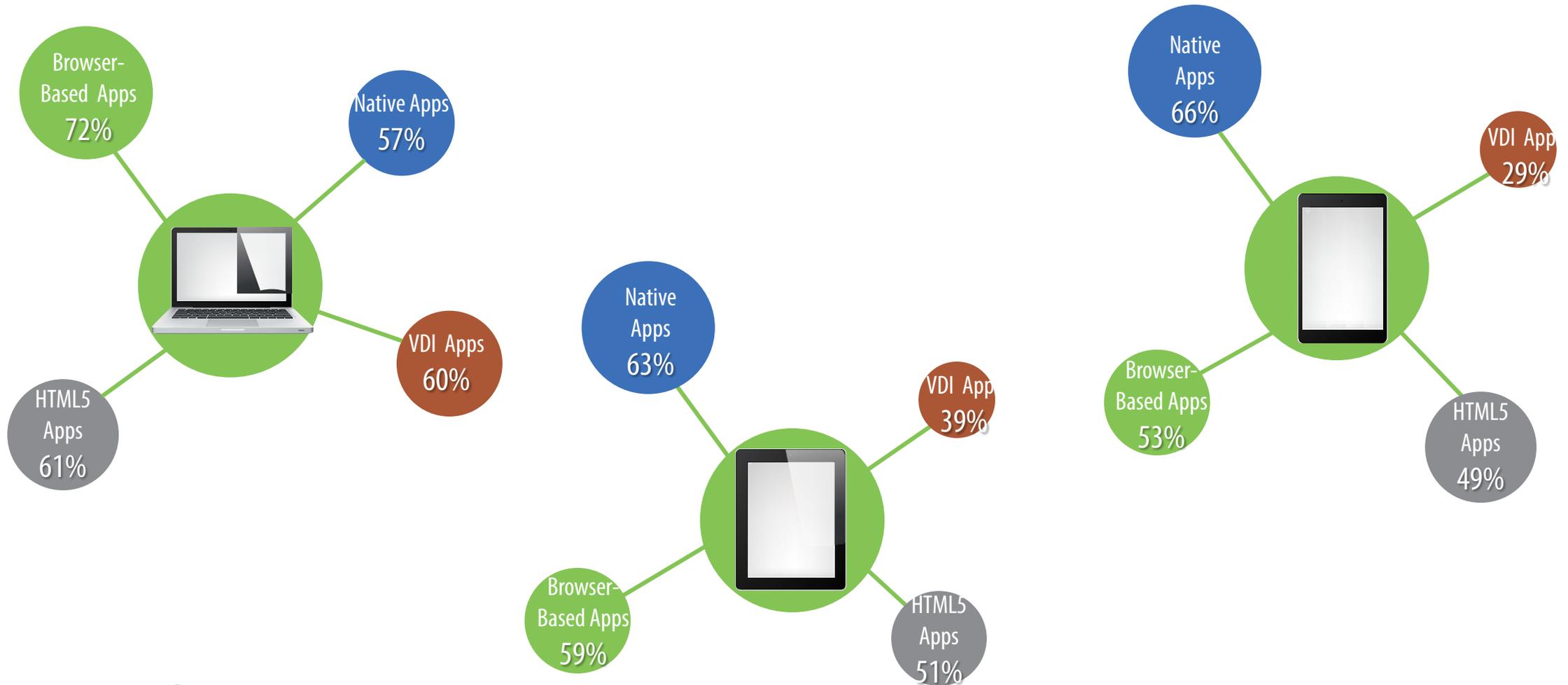
What Roles Do Custom Tablet Apps Play?

21% Utility

21% Companion App

22% Front End for Enterprise App

31% Stand-Alone App

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% of tablet apps by type
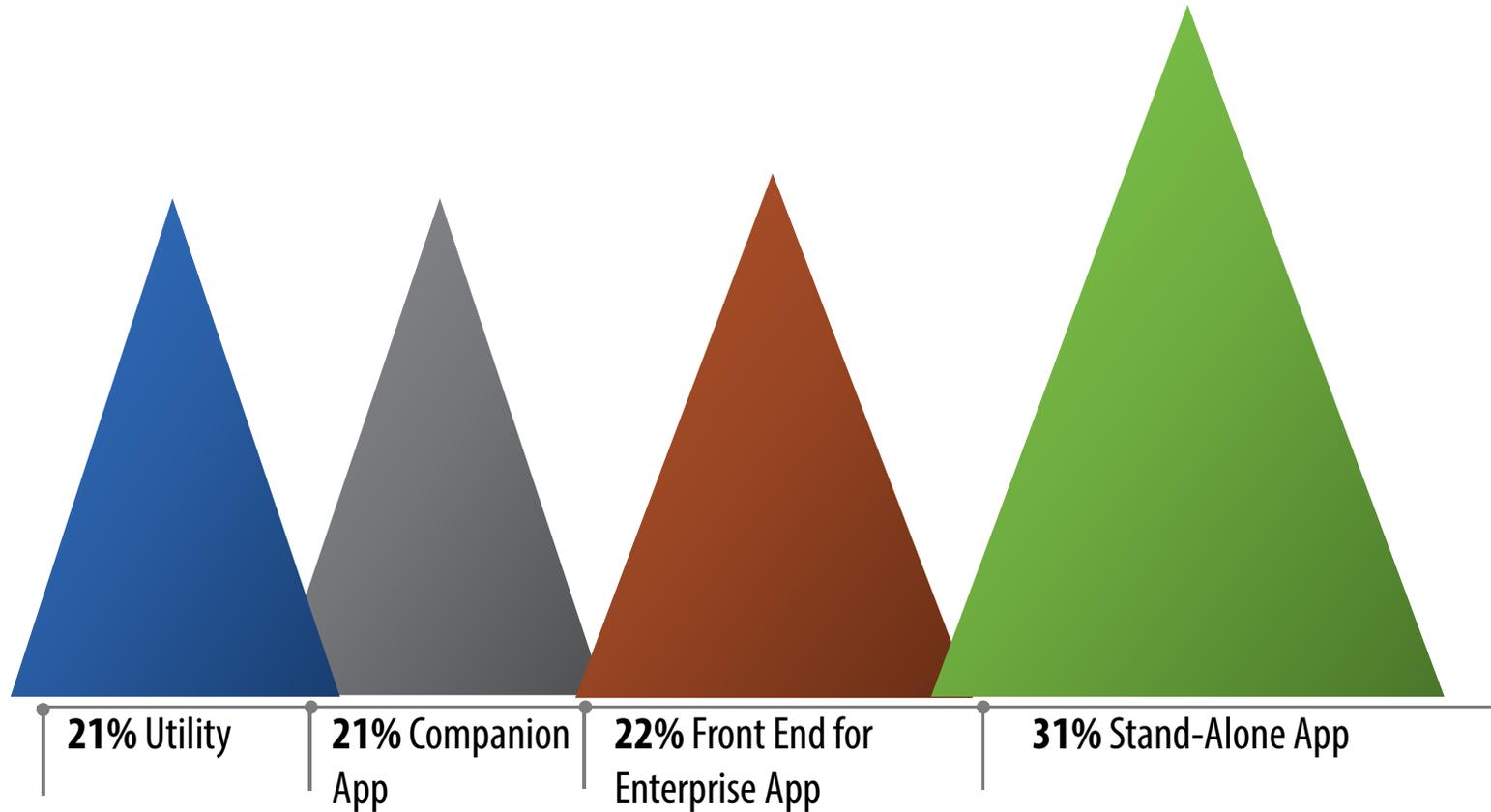
What Functions Do Custom Tablet Apps Offer?

17%	13%	12%	11%	10%	9%	8%
E-Mail/ Messaging	Industry Specific Info	Salesforce Automation	PIM	Security/ Networking	Document Management	Expense Management

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% of tablet apps by function
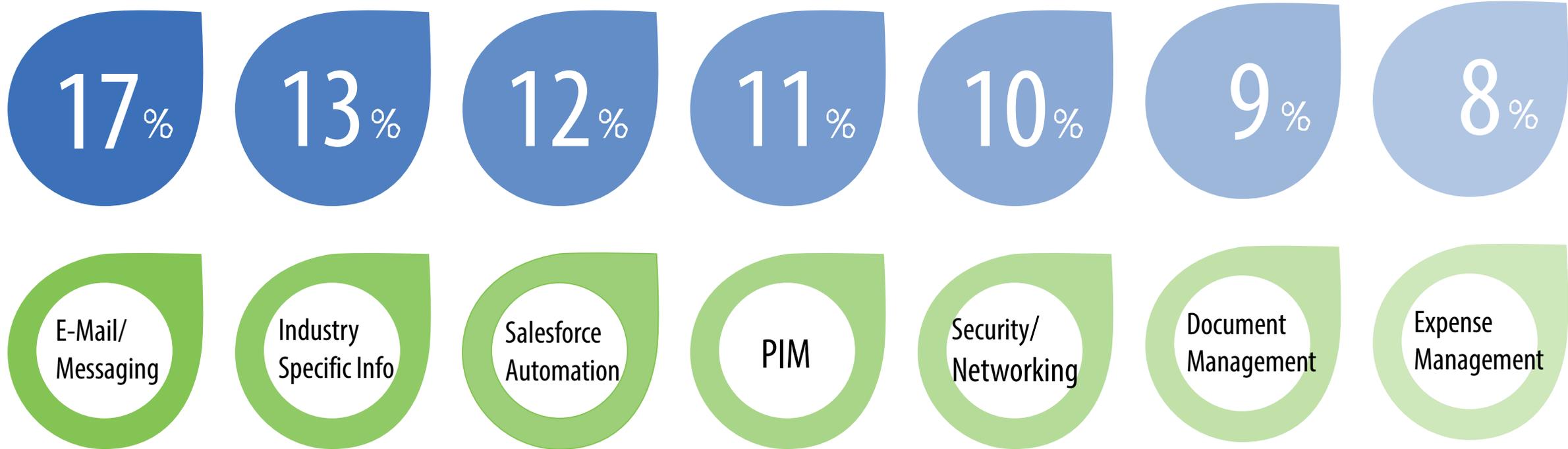
What Roles Do Custom Smartphone Apps Play?

20% Utility

21% Companion App

23% Front End for Enterprise App

34% Stand-Alone App

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% of smartphone apps by type
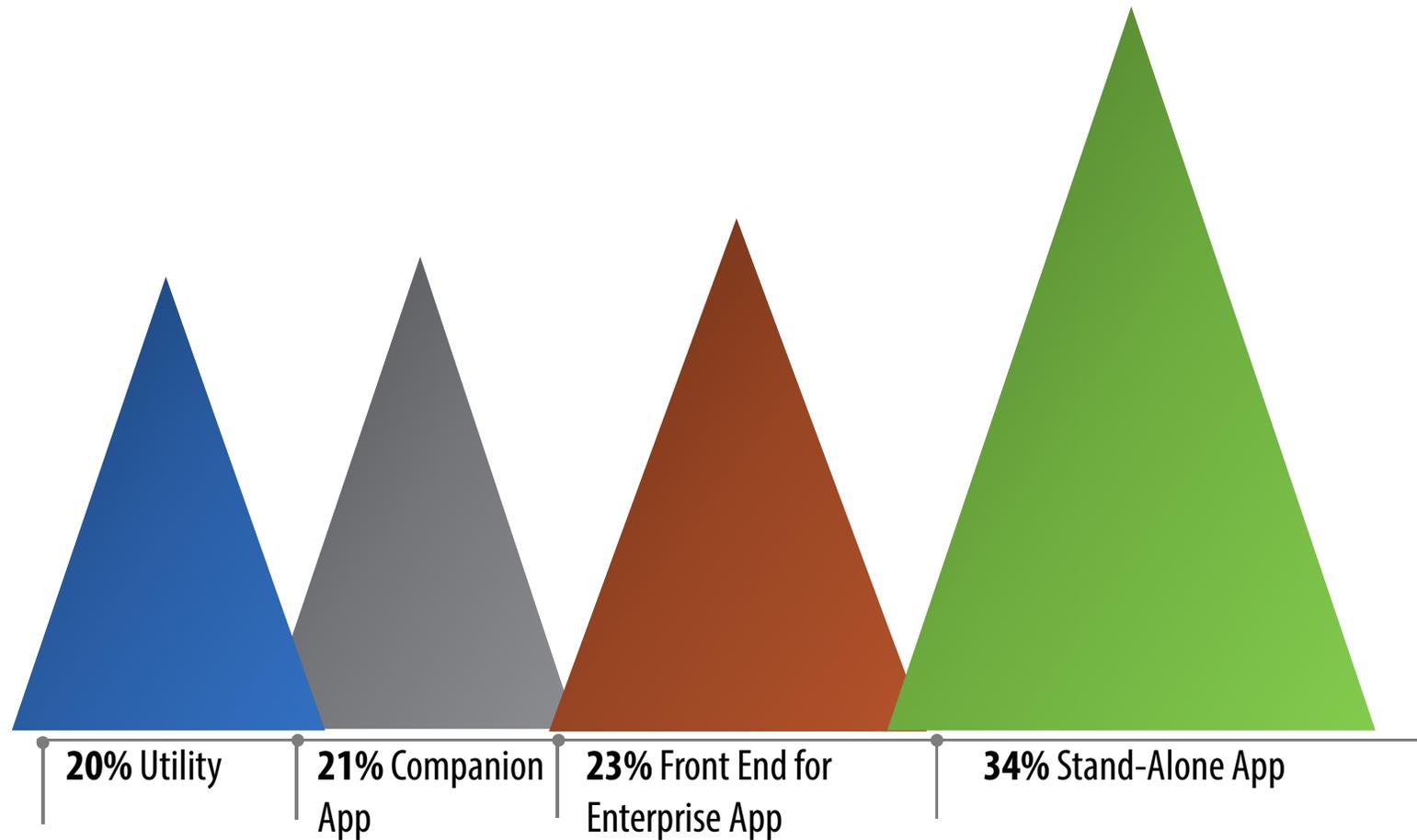
What Functions Do Custom Smartphone Apps Offer?

19%	14%	14%	13%	13%	12%	9%
E-Mail/ Messaging	Salesforce Automation	Industry Specific Info	Security/ Networking	PIM	Document Management	Field Force Automation

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% of smartphone apps by function
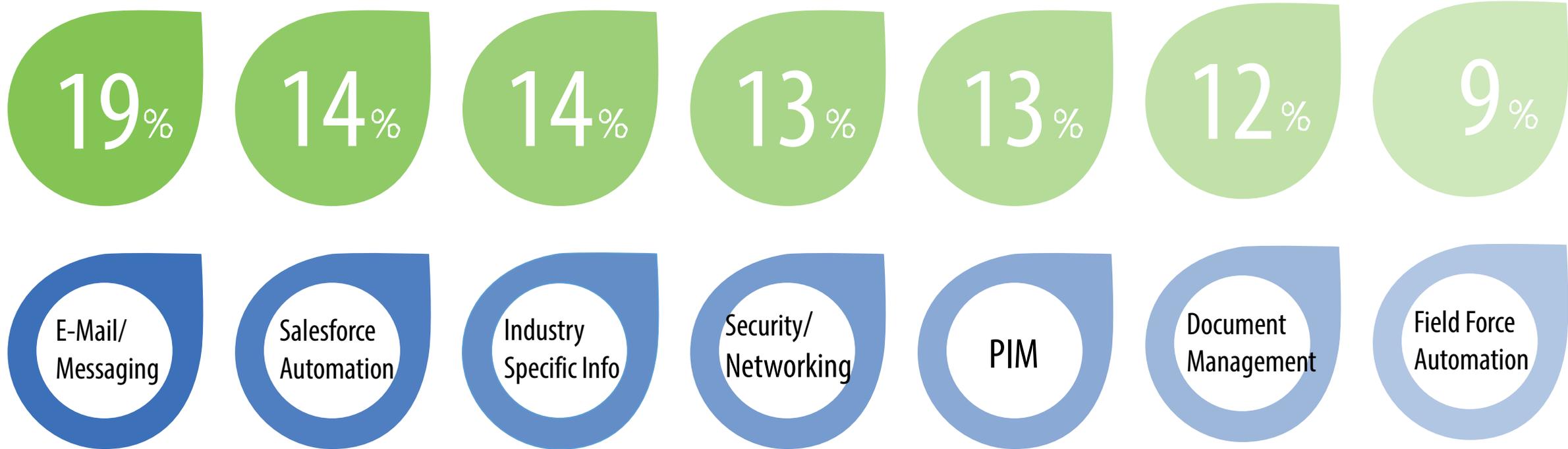
What Platforms Are Custom Mobile Apps Built On?

40%

34%

26%

40%

39%

15%

6%

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% of native tablet and smartphone
apps by platform
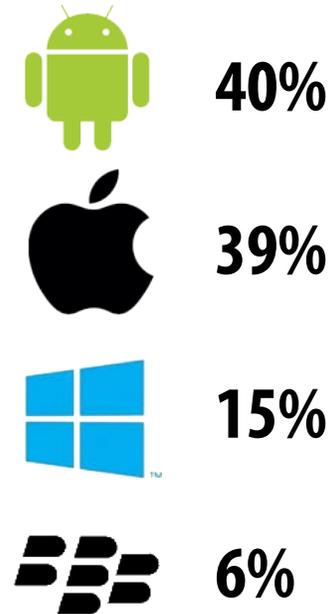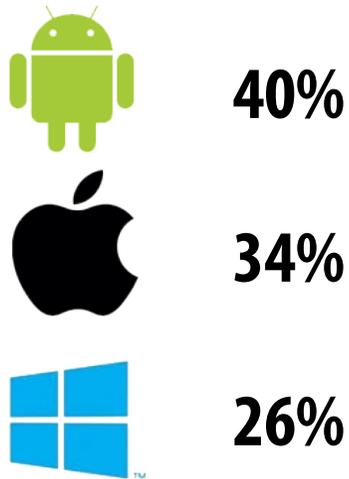
How are Custom Apps Being Deployed?

Laptop:
- 3rd Party App Store: 22%
- Automatic by IT: 61%
- Optional via Intranet: 30%
- Corp. App Store: 38%

Tablet (large):
- Optional via Intranet: 26%
- Automatic by IT: 55%
- 3rd Party App Store: 34%
- Corp. App Store: 38%

Tablet (small):
- Optional via Intranet: 27%
- Automatic by IT: 57%
- 3rd Party App Store: 28%
- Corp. App Store: 41%

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% of app delivery methods by device
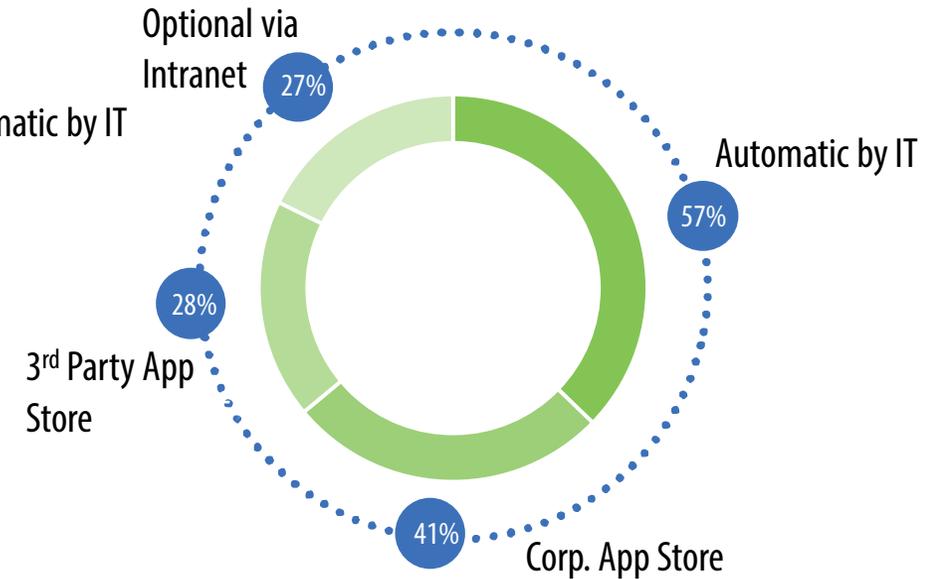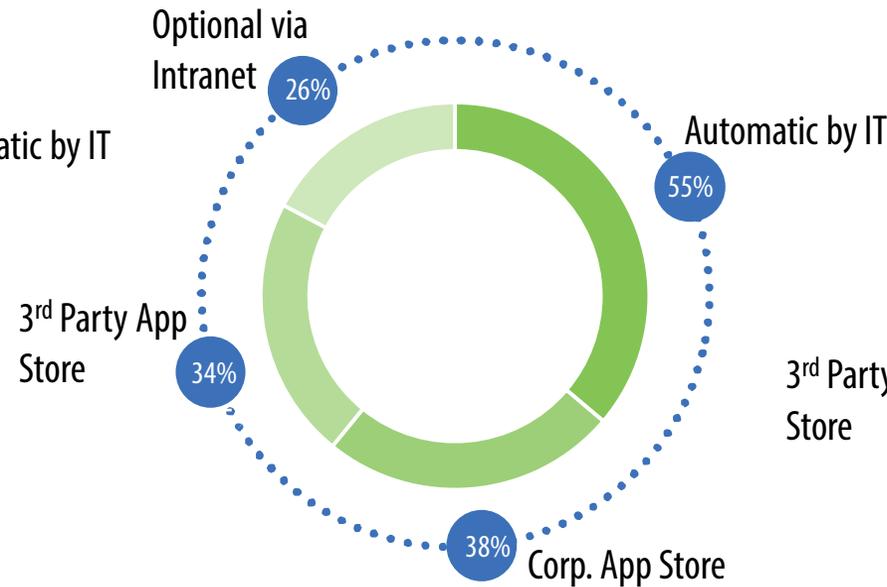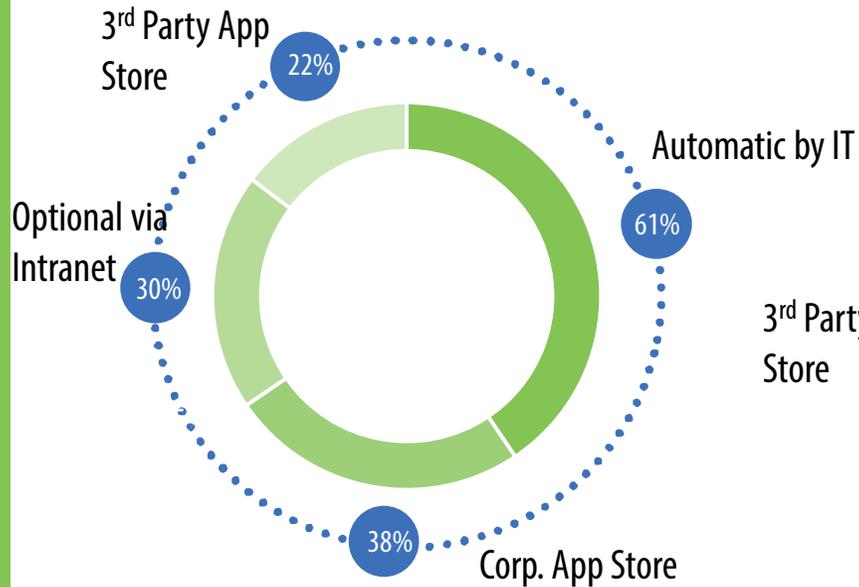
Key Takeaways, Part 1

- Custom mobile app development going mainstream, but…
  - PCs still the king when it comes to custom enterprise apps
  - PC influence on mobile app development still very strong
    - Types of apps built for mobile devices similar to mix for PCs
  - PC apps deployed to wider set of employees than mobile apps
- Internal skill sets for building custom mobile apps still growing
  - More dependence on external help for mobile apps than for PC apps
- Many custom mobile apps still only for top management
  - Tablet and smartphone apps popular with outside sales as well
- Native apps are growing, but a large percentage of companies are working on several different app development efforts on both tablets and smartphones
  - About 2/3 of respondents building custom mobile apps are building them on native platforms, but nearly ½ are also building browser-based apps and HTML5 apps

Key Takeaways, Part 2

- Only 1/3 of tablet and smartphone apps are standalone, most tie into existing systems
    - Nearly ¼ are front ends for large enterprise databases
- Both custom tablet apps and custom smartphone apps offer a wide range of functionality
    - Links to email/messaging most important, but salesforce automation, industry-specific information and several other functional areas also being supported
- Android is leading platform for both tablets and smartphones
    - Apple a close second in each case
    - Windows development efforts surprisingly strong for both tablets and smartphones
- Top deployment method is automatic installation by IT on all devices, but app stores are more important for both smartphone and tablet apps
    - Corporate app stores larger than 3rd party apps stores in all cases

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