

# ENTERPRISE IPAD AND TABLET ADOPTION: A SURVEY



Dimensional Research | May 2011

## Introduction

It has been a year since Apple first introduced the iPad, and sales have beaten all projections. However, there is still no consensus about how iPads and other tablets will fit into business environments and if enterprises will adopt them for broad business use. Recent releases such as Apple's iPad2, the BlackBerry PlayBook, and a wide variety of other Android-based tablets have expanded the choice of tablet options while reigniting the discussion of the suitability of tablets for enterprise use. Do tablets offer compelling enough functionality to drive serious corporate adoption?

The following report, sponsored by Model Metrics, is based on a survey of 448 business stakeholders and IT professionals conducted in April 2011. The goal of the survey was to gather data about plans for adoption of iPads or other tablets within the enterprise.

## Executive Summary

- **The enterprise is adopting iPads and tablets**
  - 22% have formally deployed iPads or other tablets
  - 78% plan to have tablets deployed by the end of 2013
  - 83% plan to deploy Apple iPads; 34% plan to deploy Android-based tablets
- **iPad adoption lacks clear strategy**
  - 51% report no clearly articulated strategy for adopting iPads and tablets
  - 72% have iPads or other tablets in use today, although they have not been formally deployed
  - 41% are used by individuals who have purchased on their own
  - 49% say the first iPads used in their companies were purchased by C-level executives
- **Sales force automation is the most requested enterprise application for tablets**
  - 47% see demand for sales force automation applications on tablets
  - 84% of salesforce.com users see demand for the app on a tablet
- **IT and business users are not aligned on effort needed to deliver iPad applications**
  - 42% of IT users say their business stakeholders do not understand the need for additional development to enable enterprise applications on iPads and tablets

## Detailed Findings

### Existing iPad adoption healthy, future plans aggressive

Among participants, 22% reported that they have formally deployed iPads or other tablets in their enterprise. This is a particularly significant number since the iPad has been available for only one year.



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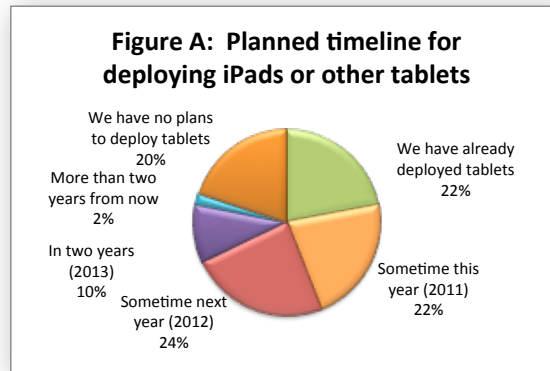


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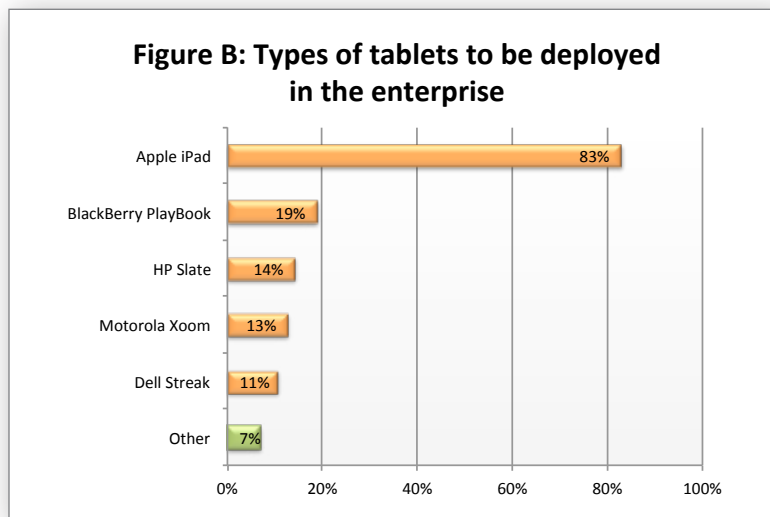
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Plans for future adoption are aggressive with a further 22% planning to deploy sometime this year, 24% planning to adopt in 2012, and 10% with plans to deploy in 2013. If participants follow their current plans, a total of 78% will have iPads or other tablets deployed in their enterprises by the end of 2013. See **Figure A**.



## Apple iPad dominates enterprise tablet adoption plans

According to survey participants, Apple iPad was the most likely brand of tablet to be adopted by enterprises with 83% of those with plans for tablet adoption indicating the iPad would be deployed. The next most common tablet to be deployed in enterprises was BlackBerry PlayBook, far behind the iPad at only 19%. See **Figure B**.



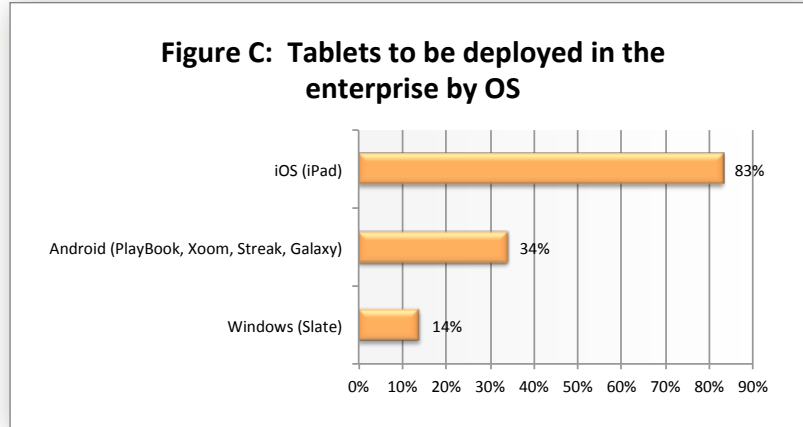
Participants were asked to specify if they had plans to deploy tablets other than those mentioned, and 7% did indicate additional brands. The Samsung Galaxy and the ASUS Eee Slate were the most frequently mentioned tablets not specifically presented in the survey question options.

As separates brands, no single Android-based tablet was a clear leader among participants, but Android-based tablets as a group showed solid adoption. 34% reported that their organizations have deployed or plan to deploy BlackBerry PlayBook, Motorola Xoom, Dell Streak, Samsung Glaxy, ASUS Eee Slate or other tablets using the Android operating system for tablets. See **Figure C**.

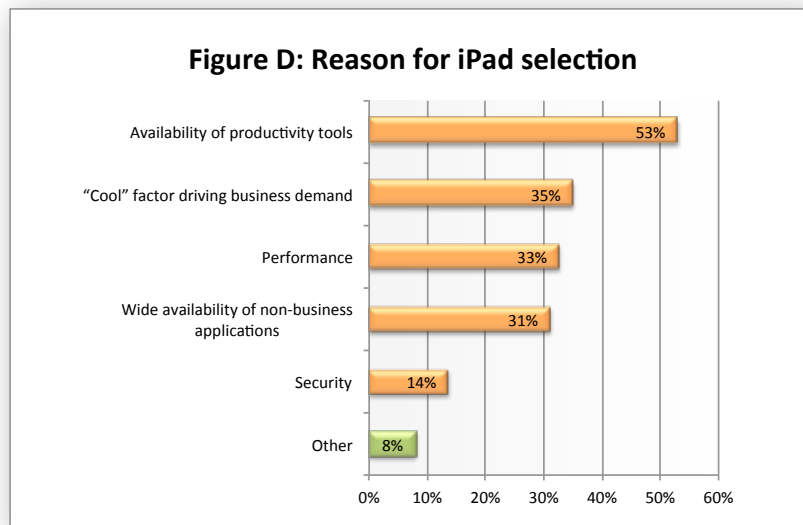
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Participants who indicated that the only tablet that they were deploying was the iPad were asked about their reasons for selecting the iPad for enterprise use. The justification most frequently cited was the availability of productivity tools (53%). See **Figure D**.



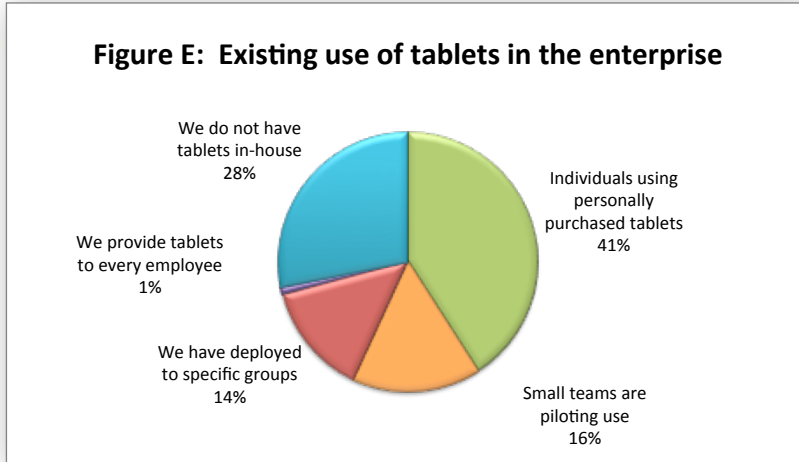
## iPads widely used in enterprise yet not being formally deployed

While only 22% of participants report having formally deployed tablets (Figure A), a total of 72% of participants do have iPads or other tablets in use in their companies today. The majority of iPads in the enterprise are being used by individuals who personally purchased tablets and are using them for business (41%). See **Figure E**.

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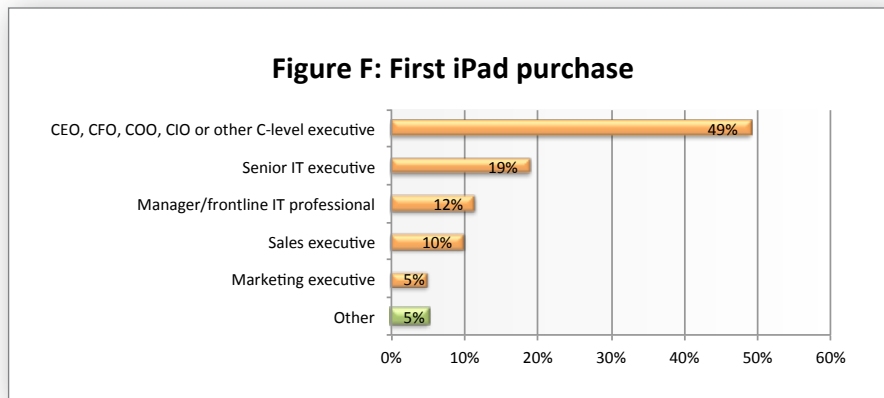
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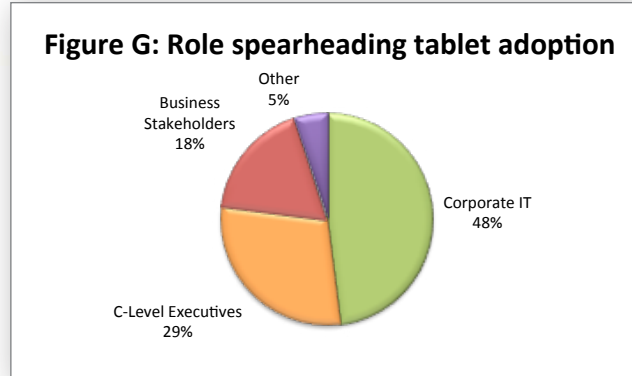
Only 12% of survey participants have a corporate IT policy of not allowing tablets.

## iPads are introduced by executives, but adoption is driven by IT

Executives are typically the first employees to bring iPads into an organization. Among participants 49% reported that C-level executives purchased the first iPads used in their companies. See **Figure F**.



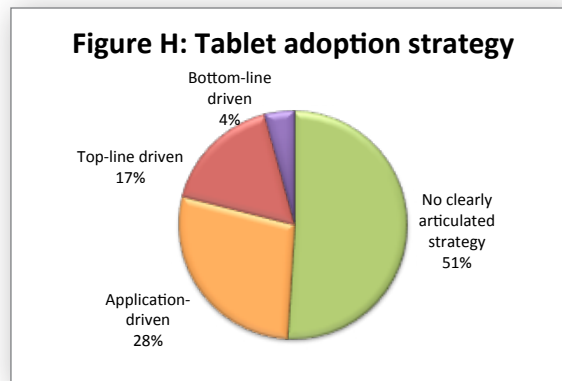
However, once iPads are introduced into the organization, it is primarily IT who is driving future adoption. According to participants, corporate IT is typically spearheading tablet adoption (48%) rather than C-level executives or business stakeholders. See **Figure G**.



## iPad and tablet adoption lacks clear strategy

Participants were asked to describe their organizations' strategy for adopting tablets. Most participants, 51%, indicated that they did not have a clearly articulated strategy. Among those with a strategy, the majority of them cited an application-driven approach (28%), where iPads would be deployed to support specific applications and business functions that were a good fit for the unique capabilities of tablets.

Very few participants report that their companies are adopting tablets to save money with only 4% describing their strategy as bottom-line driven with the goal of reducing costs. See **Figure H**.



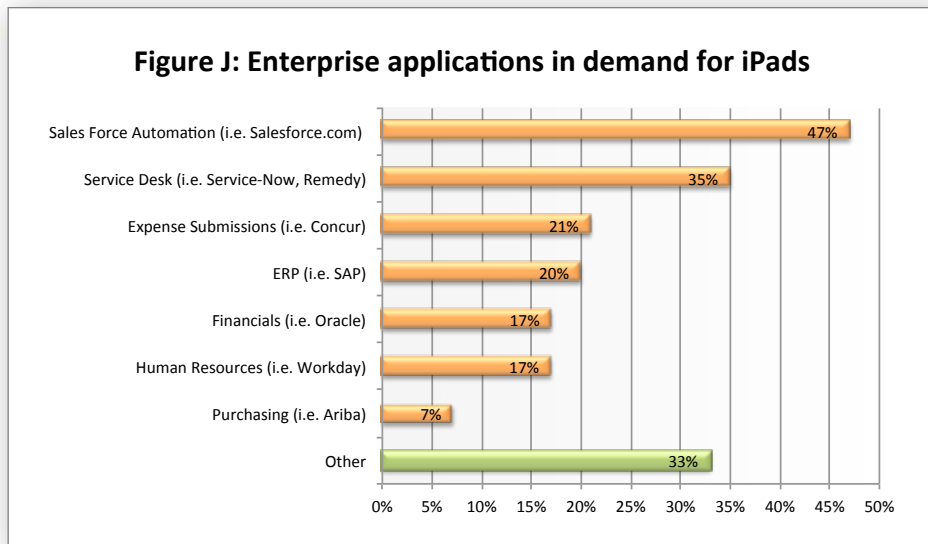
## Sales force automation in high demand on iPad

The category of enterprise applications most wanted on the iPad was sales force automation (SFA) with 47% of participants indicating that they see demand. Service desk was the second most desired category with 35%. See **Figure J**.

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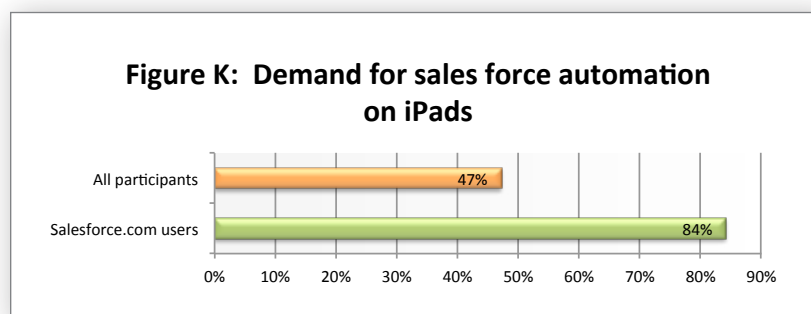
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Participants also indicated a strong desire for customized, industry-specific applications to be available on iPads. For example, applications including electronic medical records, core banking processes, and student information systems were all frequently submitted as an “other” type of enterprise application in demand on tablets.

## Existing use of cloud applications drives demand for use on iPads

Among survey participants who used Salesforce.com, a cloud-based sales force automation solution, there was a much higher demand for sales force automation (SFA) on the iPad, 84%, compared to just 47% among all participants in the survey. See **Figure K**.



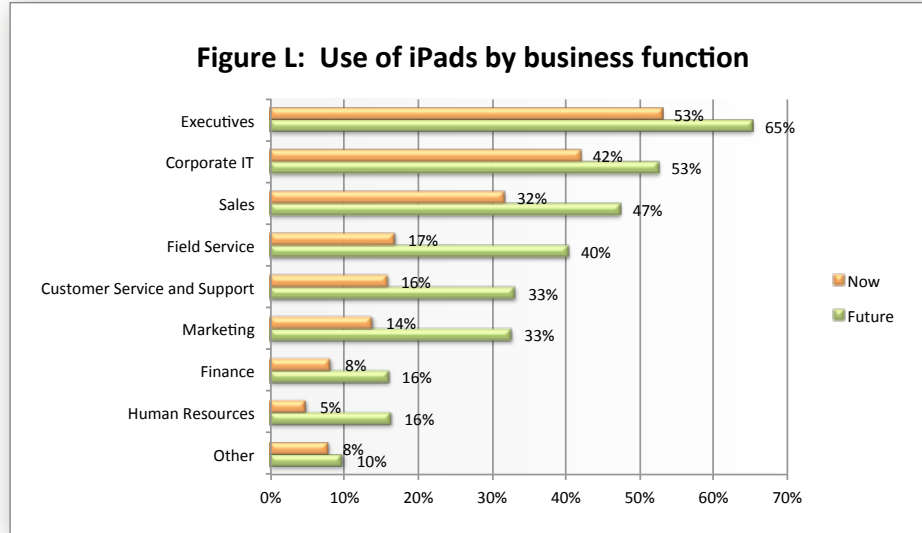
## Executives are the heaviest iPad users

Participants were asked which business functions were using iPads or other tablets today, and which they anticipated would be using them in the future. Among all survey participants, executives were clearly the heaviest users of tablets both now (53%) and in the future (65%). See **Figure L**.

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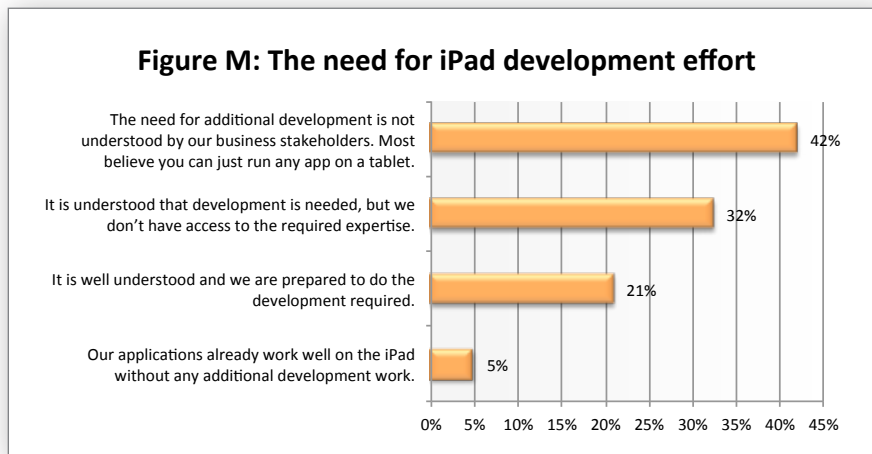
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One of the places where IT participants had a starkly different view than business stakeholders was in who would be using iPads in the future. For example, 60% of business stakeholders reported that sales would be using tablets in the future compared to only 31% of IT participants.

## IT and business not aligned on effort required to deliver enterprise iPad apps

For most enterprise applications, additional development is required to get the most value from their use on an iPad or other tablet. The IT participants in this survey were asked to describe their organizations' understanding of the need for development effort. With 42% of participants reporting that their business stakeholders think any app can run on a tablet without additional work, it is clear that IT and the business are not aligned on this need. A further 32% cited issues due to lack of expertise available to do the development (32%). See **Figure M**.



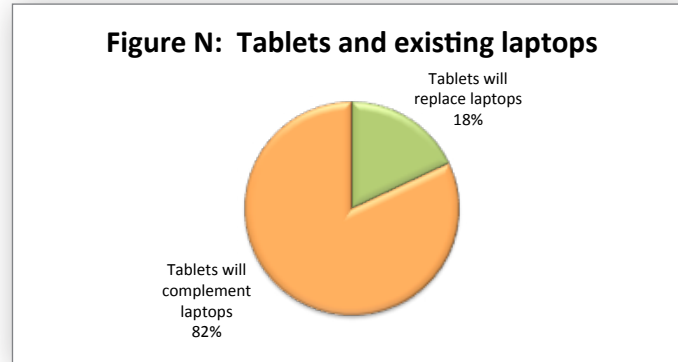
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## iPads will not replace laptops

Participants were asked if they see tablets as replacing existing laptops or complementing them. Overwhelmingly, the number of participants viewed tablets as complementing laptops (82%). See **Figure N**.



## Survey Methodology

In April 2011, an independent database of IT professionals and business stakeholders was emailed and invited to participate in a Web survey on the topic of iPad and tablet adoption in the enterprise. A total of 448 respondents completed the survey. Participants included business executives, business managers, IT executives, IT managers, and hands-on IT professionals. Participants represented a wide range of company size and industry verticals.

Respondents were not compensated for participating in this survey except to be offered a copy of the final report. The survey sponsor, Model Metrics, was not revealed to participants.

## About Dimensional Research

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With a focus on mobile and call center technology, business process and change management innovation, and custom development, Model Metrics has completed 1,500+ salesforce.com implementations for mid-sized and Fortune 1000 companies. Its world-class application development skills using Force.com, Adobe Flex and AIR, Amazon Web Services, Google and the Apple iPhone enable the creation of custom applications featuring multimedia-rich user experiences. To learn more, visit [www.modelmetrics.com](http://www.modelmetrics.com) or follow us on Twitter at @modelmetricsinc.