Tablets Become Nice-To-Have In The Enterprise, But Challenges Lie Ahead
February 2011

Introduction

Technology analysts and journalists alike have been premature in proclaiming the death of the PC. Even in the empowered age of smartphones, netbooks, and tablets, the PC has a unique way of reinventing itself to satisfy user needs in the workplace. In a survey of more than 1,700 information workers (iWorkers) in North America, notebooks, desktops, and smartphones were found to be "must-have" devices, while tablets, slates, and netbooks were relegated to "nice-to-have" status (see Figure 1).

Users want to accomplish work primarily through their PCs — where they can consume, collaborate, and create. But they also recognize that during certain times, in certain locations, or when mobile they prefer to use nonstandard form factors, including tablets — where they can consume and collaborate, but not create (see Figure 3).

> Tablets bring several new benefits to the workforce, such as increased productivity and flexibility, but they also bring with them security and manageability challenges.
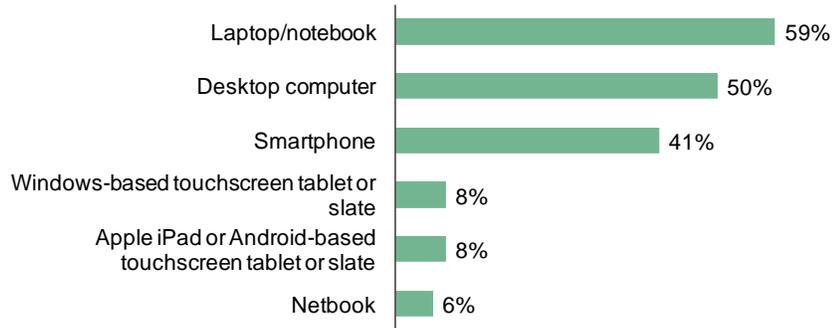
Tablets are entering the workforce in very different ways than smartphones did 10 years ago. Smartphones came in as IT-provisioned devices for on-call operations staff and road warriors. Tablets are brought in by eager employees and are opening doors to many new business scenarios. But they don't displace existing PCs; rather, they replace paper-based systems, such as insurance underwriting, pharmaceutical sales, or construction site reviews, and introduce new productivity places that previously didn't exist, such as order taking or educating a prospect about a product on a retail floor. Tablets are emerging as viable companion devices for select iWorkers, but they also introduce complexity for IT managers who struggle to keep ahead of the pace of consumer innovation that now impacts their corporate applications, infrastructure, and services (see Figure 4).

Figure 1

PCs And Smartphones Are "Must-Have" Devices For iWorkers, While Tablets And Netbooks Are "Nice-To-Have"

"If you had your choice of two work devices that would make you most productive in your job, which two devices would you prefer to have?"

Laptop/notebook	59%
Desktop computer	50%
Smartphone	41%
Windows-based touchscreen tablet or slate	8%
Apple iPad or Android-based touchscreen tablet or slate	8%
Netbook	6%

Base: 1,716 North American workforce employees
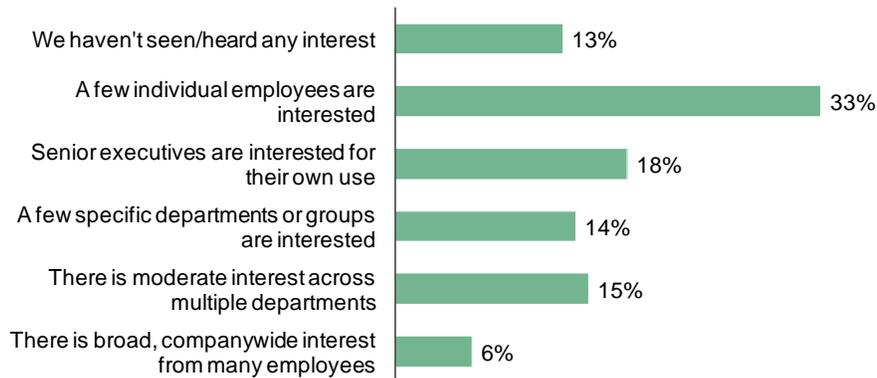
Source: Forrsights Workforce Employee Survey

Figure 2

End User Interest In Tablets Is On The Rise, But It's Often Departmental Or Limited To Executive Managers

"Regardless of IT support, which of the following best describes your firm's level of end user interest in using tablets as a complement or alternative to traditional laptops?"

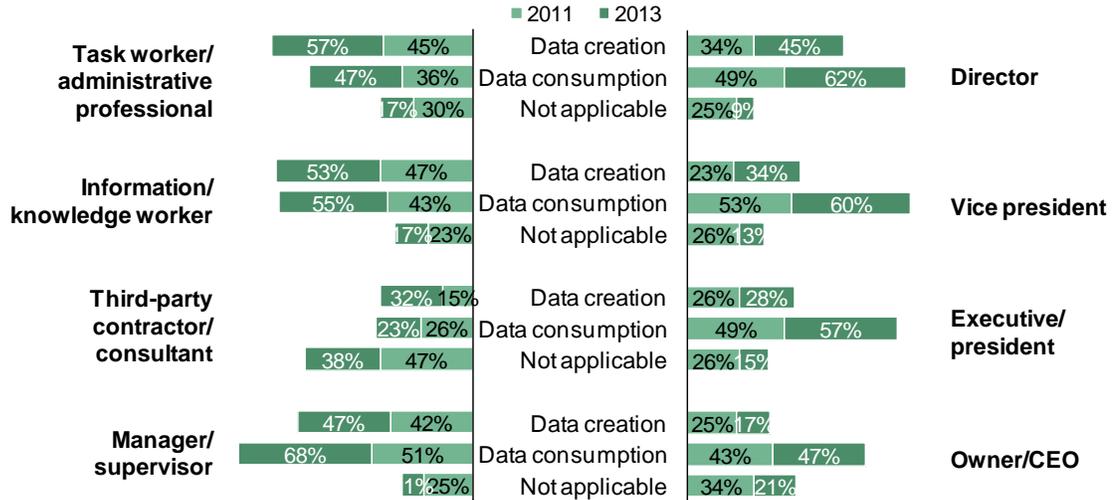|	
We haven't seen/heard any interest	13%
A few individual employees are interested	33%
Senior executives are interested for their own use	18%
A few specific departments or groups are interested	14%
There is moderate interest across multiple departments	15%
There is broad, companywide interest from many employees	6%

Base: 361 North American IT decision-makers

Source: Forrsights Hardware Survey, Q3 2010

Figure 3

Workers Are Beginning To Find Value In Tablets, And IT Needs To Prepare For This New Reality

"For each of the following types of workers, what is your company's usage model for tablet devices today (2011) and how do you expect it to evolve in the next two years (2013)?"

■ 2011 ■ 2013

Task worker/administrative professional			
Data creation	57%	45%	
Data consumption	47%	36%	
Not applicable	7%	30%	

Director			
Data creation	34%	45%	
Data consumption	49%	62%	
Not applicable	25%	9%	

Information/knowledge worker			
Data creation	53%	47%	
Data consumption	55%	43%	
Not applicable	7%	23%	

Vice president			
Data creation	23%	34%	
Data consumption	53%	60%	
Not applicable	26%	3%	

Third-party contractor/consultant			
Data creation	32%	15%	
Data consumption	23%	26%	
Not applicable	38%	47%	

Executive/president			
Data creation	26%	28%	
Data consumption	49%	57%	
Not applicable	26%	5%	

Manager/supervisor			
Data creation	47%	42%	
Data consumption	68%	51%	
Not applicable	1%	25%	

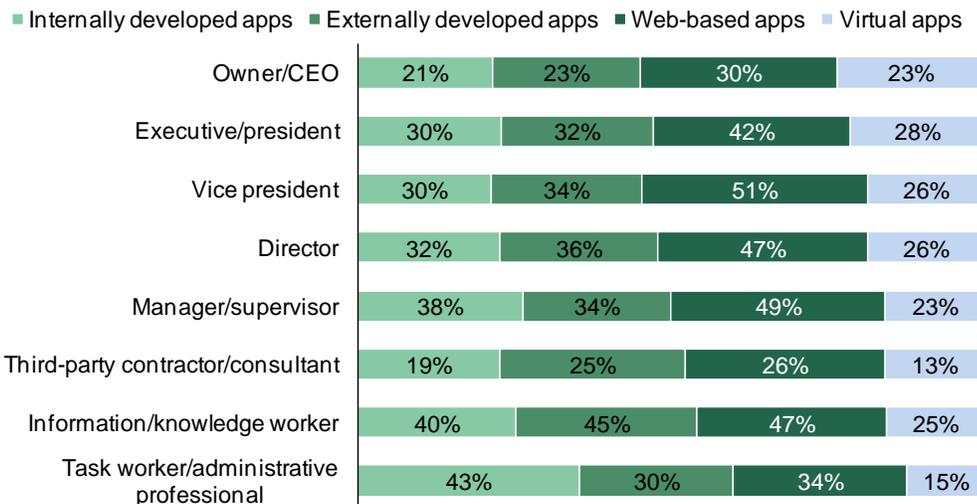| Owner/CEO			
Data creation	25%	17%	
Data consumption	43%	47%	
Not applicable	34%	21%	

Base: 53 North American IT decision-makers responsible for tablet strategies

Source: A commissioned survey conducted by Forrester Consulting on behalf of Dell and Intel, February 2011

Figure 4

Porting Applications To Tablets Is An Extremely Costly And Laborious Challenge Facing IT Managers

"For each of the following types of workers, how do you expect the application usage model of tablet devices to evolve over the next two years (2013)?"

■ Internally developed apps ■ Externally developed apps ■ Web-based apps ■ Virtual apps

	Internally developed apps	Externally developed apps	Web-based apps	Virtual apps
Owner/CEO	21%	23%	30%	23%
Executive/president	30%	32%	42%	28%
Vice president	30%	34%	51%	26%
Director	32%	36%	47%	26%
Manager/supervisor	38%	34%	49%	23%
Third-party contractor/consultant	19%	25%	26%	13%
Information/knowledge worker	40%	45%	47%	25%
Task worker/administrative professional	43%	30%	34%	15%

Base: 53 North American IT decision-makers responsible for tablet strategies

Source: A commissioned survey conducted by Forrester Consulting on behalf of Dell and Intel, February 2011

Avoiding Tablet Buyer's Remorse

Tablets deliver business benefits, but they also introduce new challenges that IT must deal with. The number of mobile devices and configurations that IT is expected to support will grow across the board. In fact, 82% of IT decision-makers expect the number of smartphones and other non-PC devices to grow by 5% or more over the next two years, with 26% expecting it to grow by more than 25% (see Figure 5). As these numbers increase, so does the pressure for IT to support a heterogeneous client environment. This proliferation of form factors and devices is beginning to strain IT professionals. In fact, 58% cited the growth in the number of devices and configurations to support and the cost of deployment as the biggest concerns with supporting and managing tablets in the enterprise, while application development complexity rounds out the top three challenges facing IT managers today (see Figure 6).

> Only 6% of enterprise IT managers have experienced broad interest in tablets, and 13% have experienced no interest at all (see Figure 2).

It's rare these days to find an IT shop that isn't pushed to deliver on a mobile strategy this year. But what is strategy in a market with 12-month product cycles and dozens of device, platform, and form factor combinations, where consumer application stores compete with enterprise considerations, and where the ecosystem is still maturing? And how do you deal with bring-your-own-device programs? Which platforms should you bet on? How can you tackle the coming application onslaught? What's IT's role in customer mobile applications? Security is clearly a key consideration for many enterprises looking to enable these devices, while also ensuring the safety, privacy, and integrity of corporate data (see Figure 7).

Figure 5

IT Managers Are Facing Overwhelming Mobile Device And Configuration Complexity As Well As User Diversity

"How do you expect the number of the following configurations/people that IT supports will change in the next two years?"
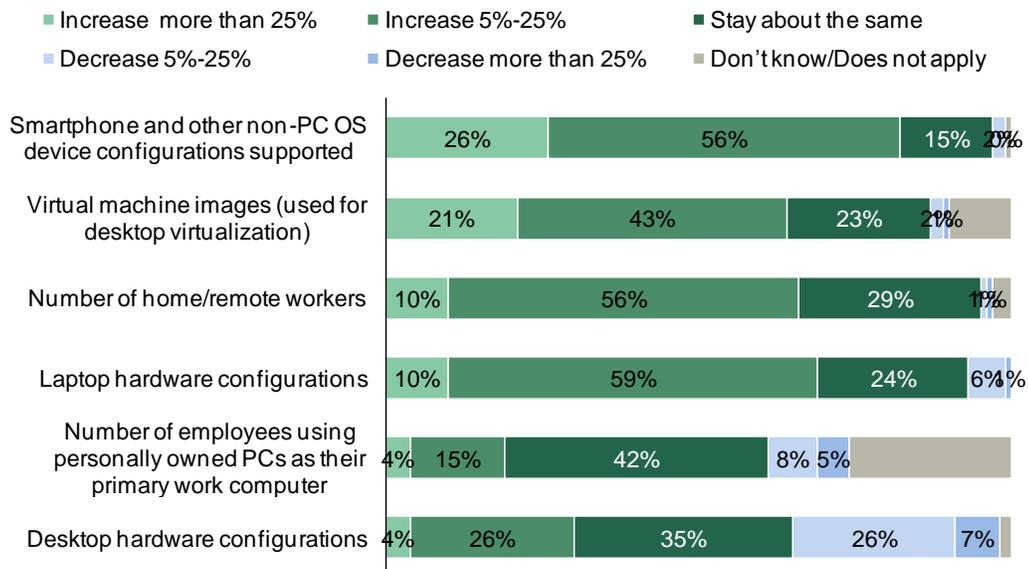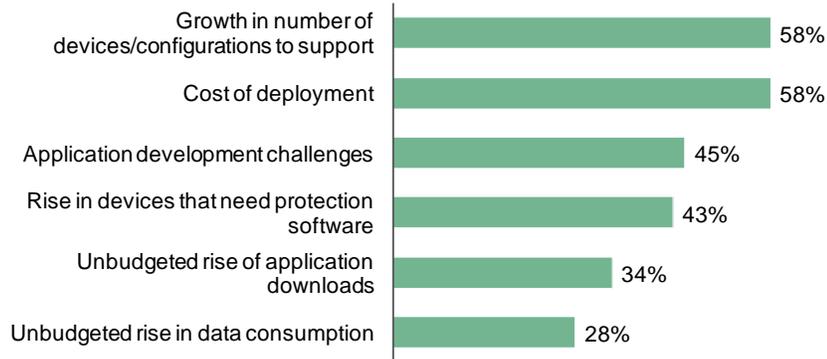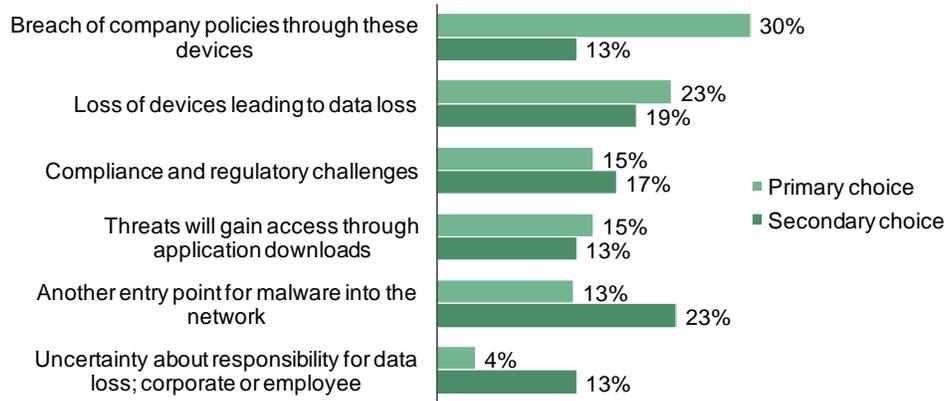
Base: 363 North American IT decision-makers

Source: Forrsights Hardware Survey, Q3 2010

Figure 6

Despite End User Interest In Tablets, There Are Multiple IT Challenges That Need To Be Addressed

"What are your firm's concerns, if any, about the support/management challenges associated with tablets in the enterprise?"

Concern	Percentage
Growth in number of devices/configurations to support	58%
Cost of deployment	58%
Application development challenges	45%
Rise in devices that need protection software	43%
Unbudgeted rise of application downloads	34%
Unbudgeted rise in data consumption	28%

Base: 53 North American IT decision-makers responsible for tablet strategies

Source: A commissioned survey conducted by Forrester Consulting on behalf of Dell and Intel, February 2011

Figure 7

The Top Three Network Security Challenges Are Policy Breaches, Data Leakage, And Regulatory Compliance

"What do you envision as the security challenges associated with enabling tablet devices within your corporate network?"

Challenge	Primary choice	Secondary choice
Breach of company policies through these devices	30%	13%
Loss of devices leading to data loss	23%	19%
Compliance and regulatory challenges	15%	17%
Threats will gain access through application downloads	15%	13%
Another entry point for malware into the network	13%	23%
Uncertainty about responsibility for data loss; corporate or employee	4%	13%

Base: 53 North American IT decision-makers responsible for tablet strategies

Source: A commissioned survey conducted by Forrester Consulting on behalf of Dell and Intel, February 2011

Methodology

This technology adoption profile was commissioned by Dell and Intel. Forrester leveraged its Forrsights Workforce Employee Survey, isolating responses of North American workforce employees, and its Forrsights Hardware Survey, Q3 2010, isolating responses of North American IT decision-makers. Forrester Consulting supplemented this analysis with custom survey questions asked of 53 North American IT decision-makers to determine their adoption plans for tablets in the enterprise as well as the management, security, and support implications. The supplementary survey was conducted in February 2011. For more information on Forrester's data panel and Tech Industry Consulting services, go to www.forrester.com.

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