Apple in the Workplace

Online Survey in Association with The Register

482 Business and IT Respondents
Completed July 2010
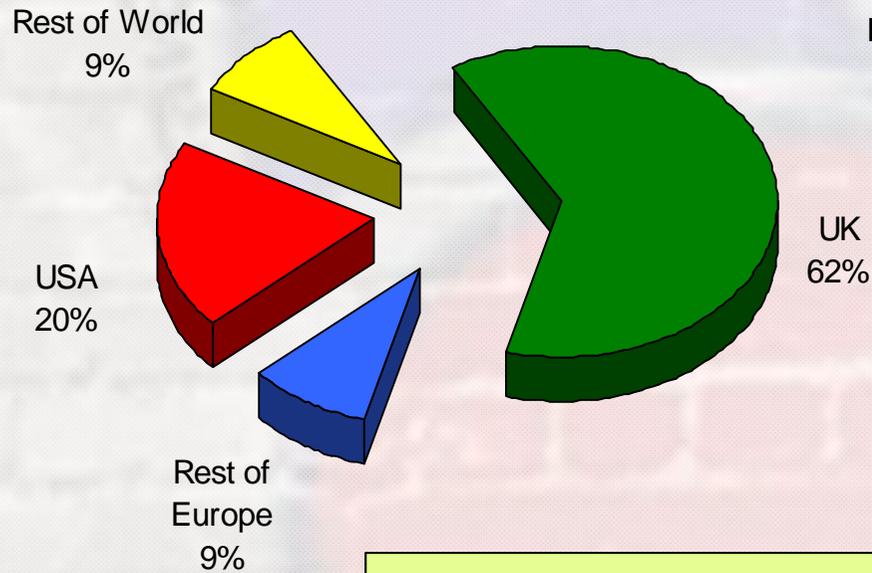
Dale Vile and Andrew Buss
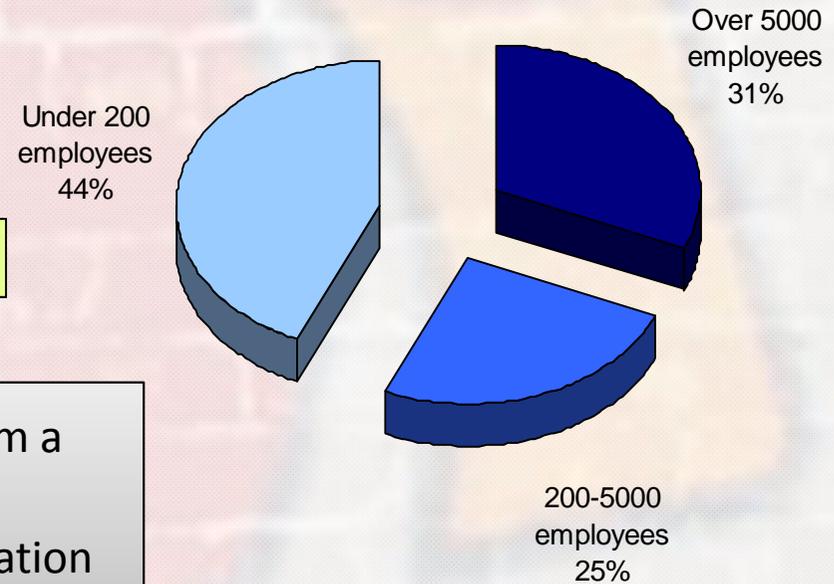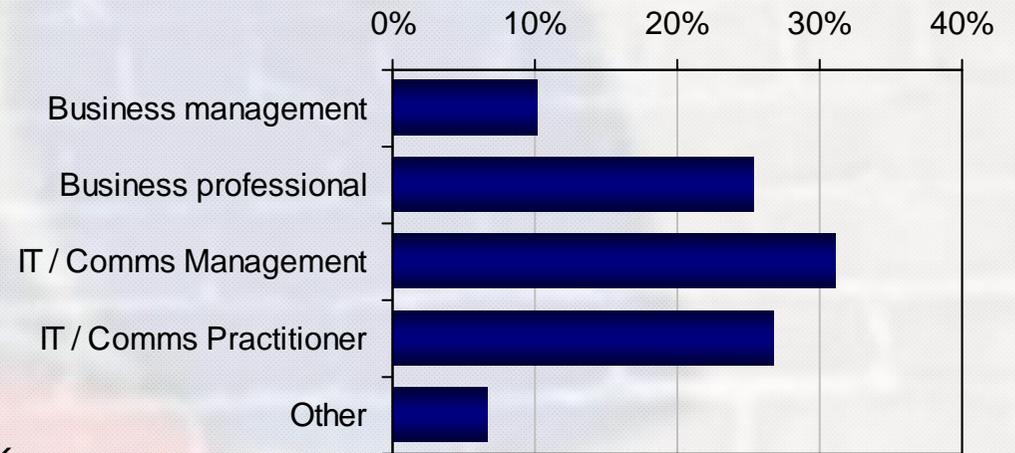
Freeform Dynamics Ltd

www.freeformdynamics.com

PART 1

Usage Patterns and Trends

Sample composition

Rest of World
9%

USA
20%

Rest of Europe
9%

UK
62%

482 TOTAL RESPONDENTS

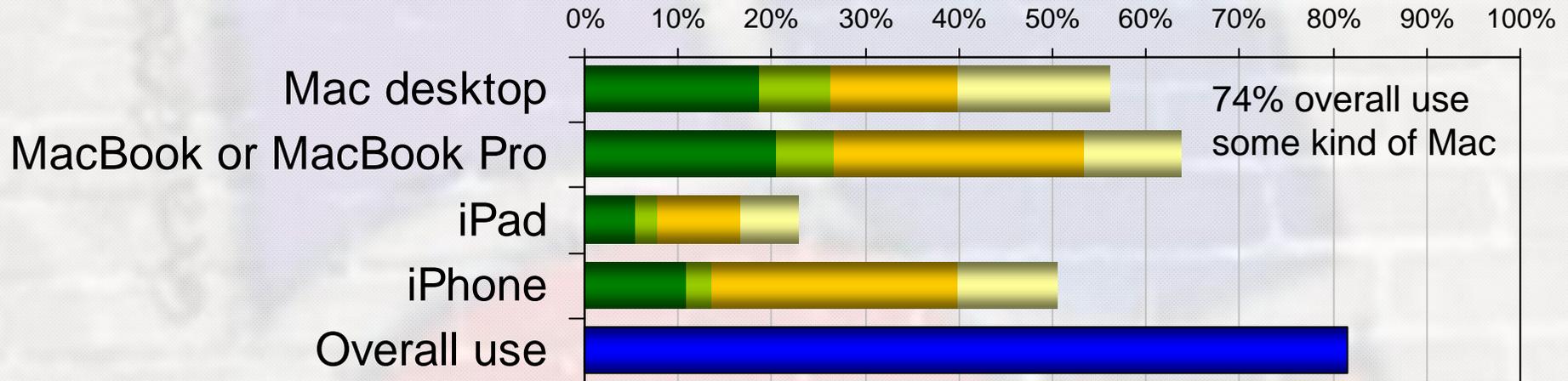|	0%	10%	20%	30%	40%
Business management					
Business professional					
IT / Comms Management					
IT / Comms Practitioner					
Other					

Over 5000 employees
31%

Under 200 employees
44%

200-5000 employees
25%

COMMENT: Sample comprised of respondents from a range of job roles and organisation sizes, with a geographical bias towards the UK and representation from the USA and other parts of the World.

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Use of key Apple product lines by respondents

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

Mac desktop

MacBook or MacBook Pro

iPad

iPhone

Overall use

74% overall use some kind of Mac

- ■ Company owned and fully supported by IT
- ■ Company owned, but not fully supported by IT
- ■ Personally owned but (also) used for business
- ■ Personally owned and used purely for personal stuff
- ■ (Use of any Apple kit in any context)

COMMENT: Four out of five respondents were users of Apple kit, with around three quarters using Mac (compared to a generally accepted 4% market share in Europe). This online sample is therefore more representative of the Apple base than the business population as a whole. Nevertheless, it allows us to see that the majority of Apple adoption is 'unofficial' in nature, supporting the notion that most activity is based on user pull rather than business push.

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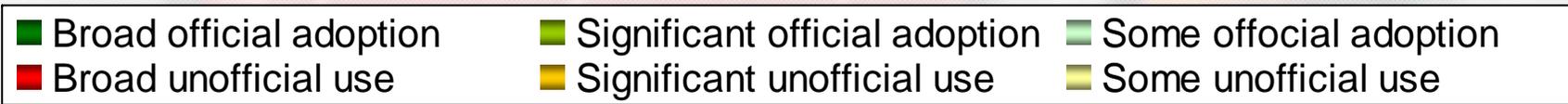# Use of Apple kit by job role and status
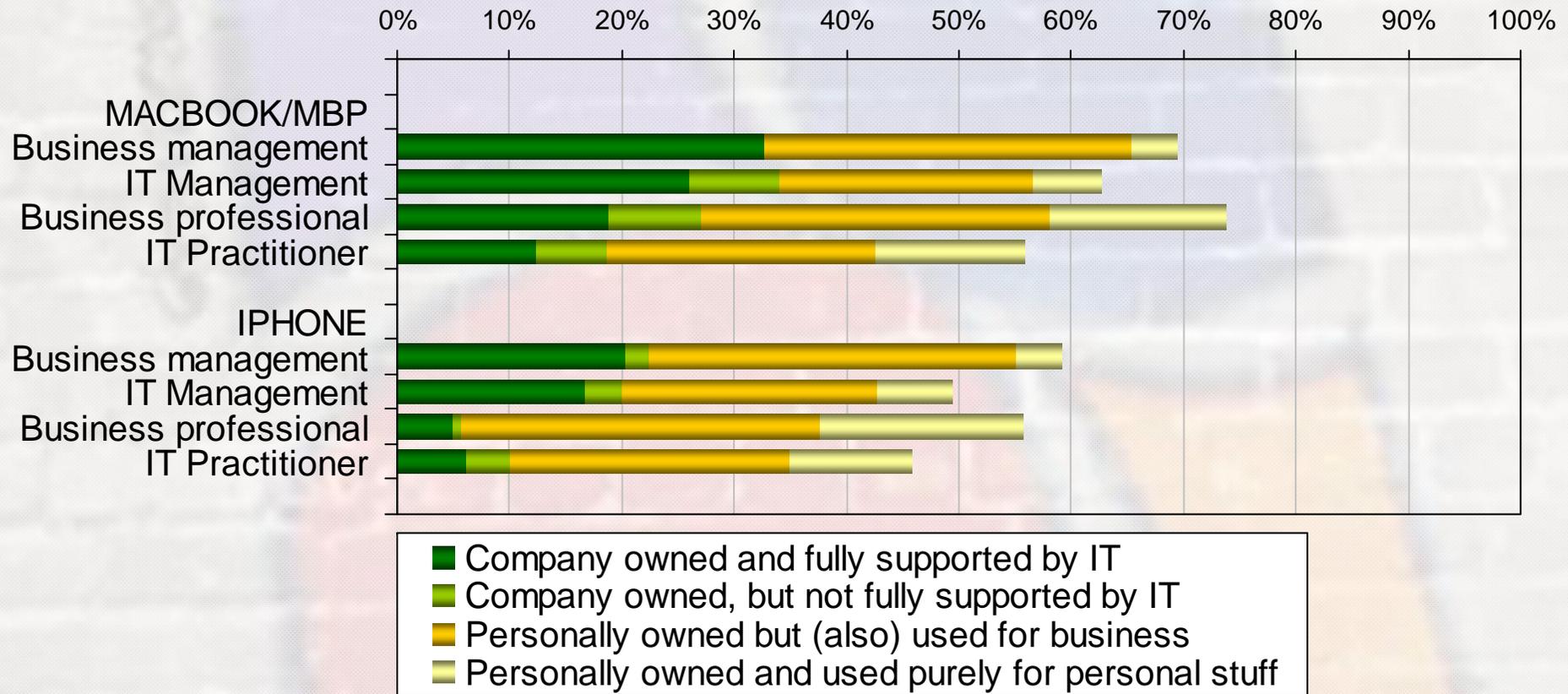
COMMENT: Evidence here that more senior people are persuading their organisations and IT departments to support their Apple habit, and if they have an Apple mobile device, they are more likely to use it for work than purely for personal activity. Having said this, all types of respondent are equally likely to be using personal Apple kit in the workplace.
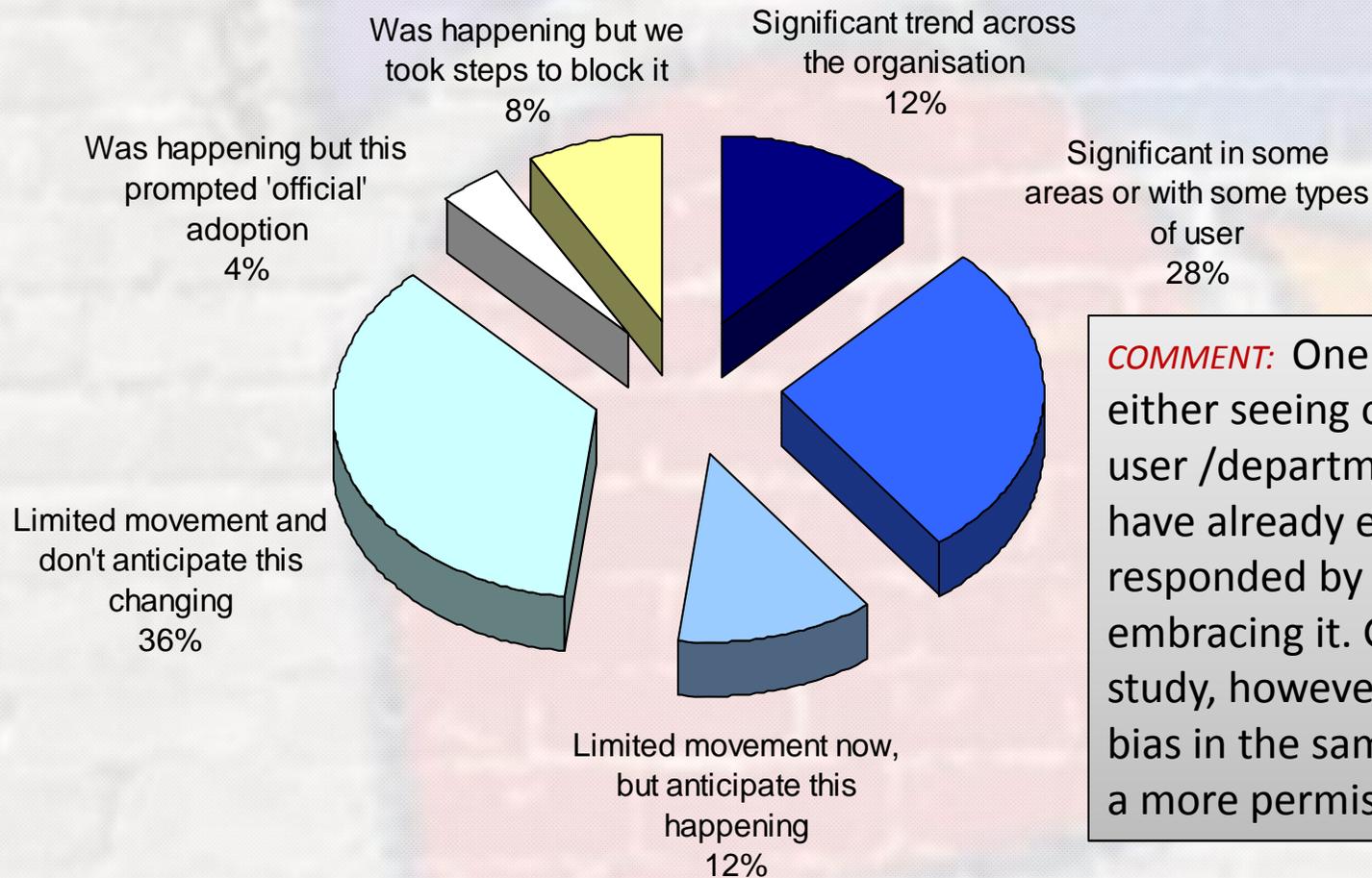
Officially supported/endorsed use of Apple kit versus (known) unofficial use across the workforce as a whole
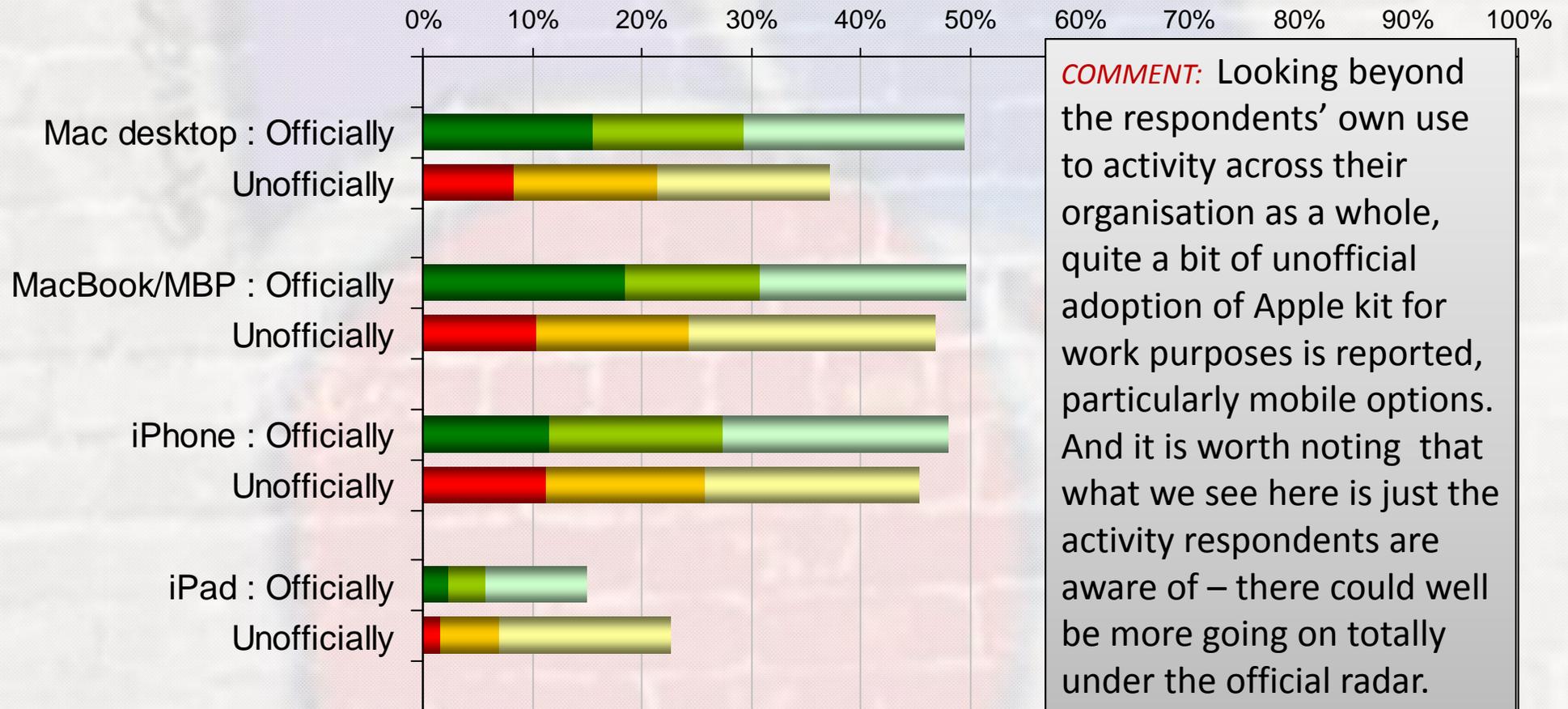
COMMENT: Looking beyond the respondents' own use to activity across their organisation as a whole, quite a bit of unofficial adoption of Apple kit for work purposes is reported, particularly mobile options. And it is worth noting that what we see here is just the activity respondents are aware of – there could well be more going on totally under the official radar.

Legend:
- Broad official adoption
- Significant official adoption
- Some offocial adoption
- Broad unofficial use
- Significant unofficial use
- Some unofficial use

Categories:
- Mac desktop : Officially / Unofficially
- MacBook/MBP : Officially / Unofficially
- iPhone : Officially / Unofficially
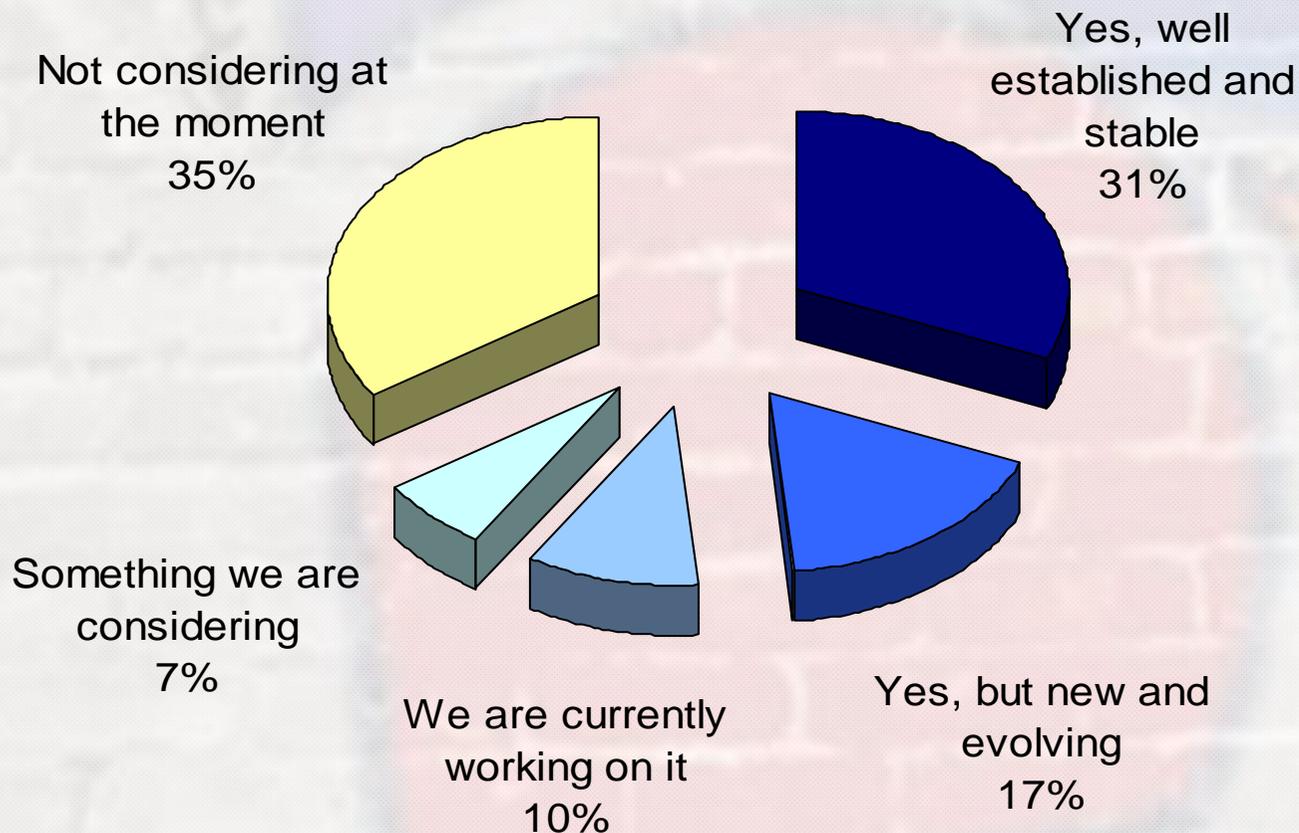- iPad : Officially / Unofficially

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Overall, to what degree are you seeing a general trend towards local departmental or user driven adoption of Apple equipment independent of IT strategy or policy?


Was happening but we took steps to block it
8%

Significant trend across the organisation
12%

Was happening but this prompted 'official' adoption
4%

Significant in some areas or with some types of user
28%

Limited movement and don't anticipate this changing
36%

Limited movement now, but anticipate this happening
12%

COMMENT: One in two organisations are either seeing or expecting unilateral user /departmental adoption. Some have already experienced this and responded by either blocking or embracing it. Given the nature of the study, however, we should assume a bias in the sample towards those with a more permissive culture.

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Does the IT department have policy and procedures in place to allow kit selected or procured unilaterally by users or departments to be connected up and supported?

Not considering at the moment
35%

Yes, well established and stable
31%

Something we are considering
7%

We are currently working on it
10%

Yes, but new and evolving
17%

COMMENT: About a third of organisations already have an established policy in place to deal with the trend towards consumerisation, with another third actively moving forward or formulating plans. Again, we should be aware of likely bias towards more permissive organisations.
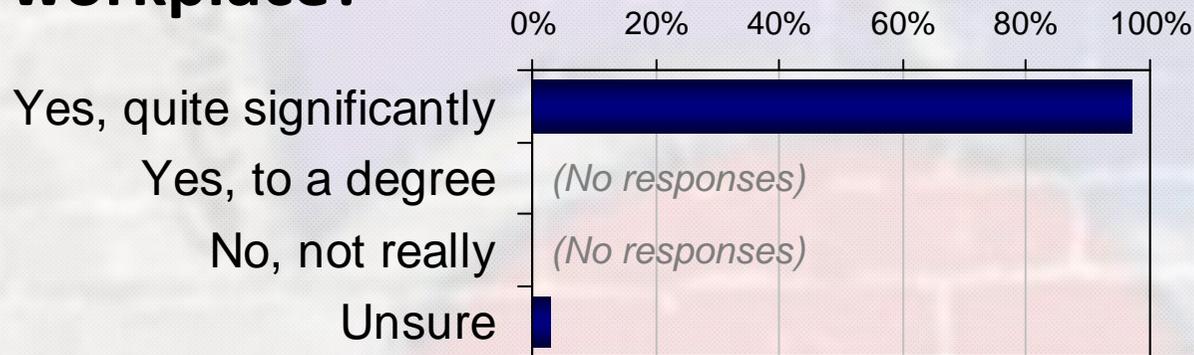
FREEFORM DYNAMICS

Does the IT department have policy and procedures in place to allow kit selected or procured unilaterally by users or departments to be connected up and supported?
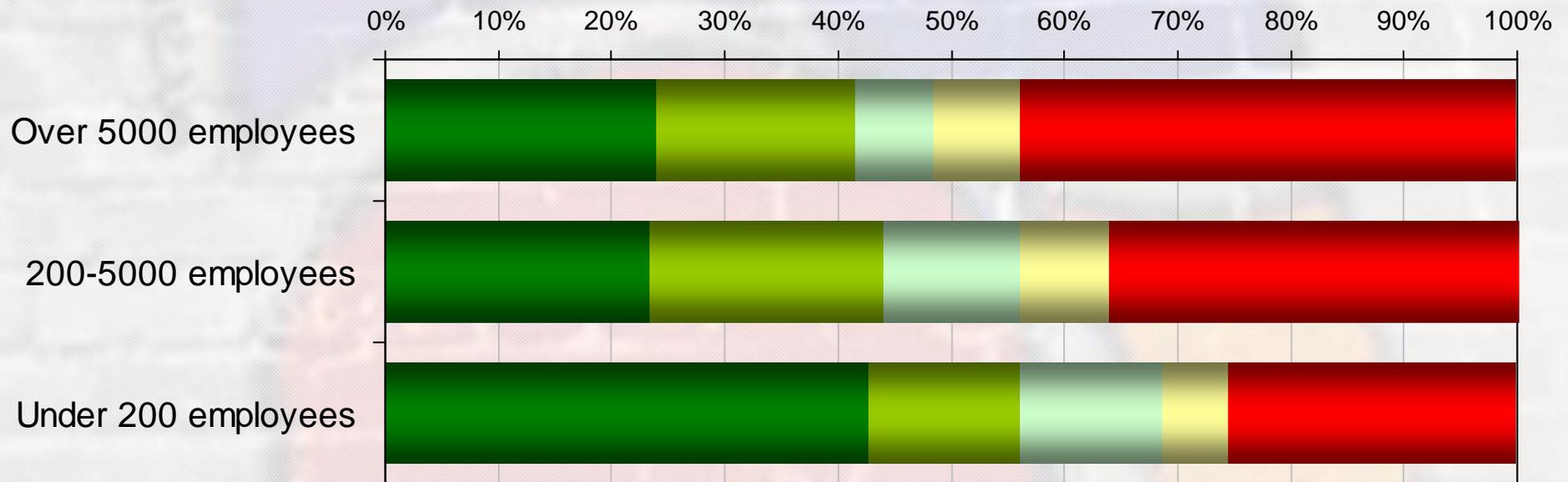
COMMENT: Smaller organisations with less complex IT infrastructures and inherently more flexibility are more likely to be taking steps to deal with consumerisation effectively.
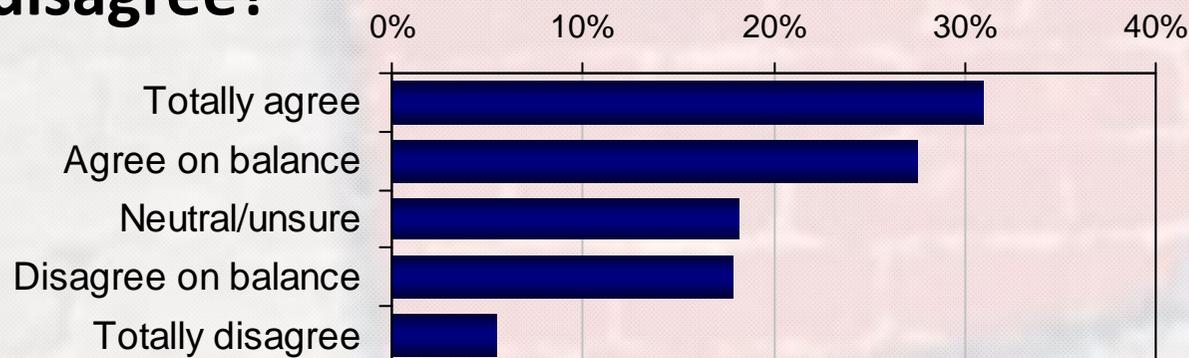
Legend:
- Yes, well established and stable
- Yes, but new and evolving
- We are currently working on it
- Something we are considering
- Not considering at the moment

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Has the 'iPhone effect', i.e. the enthusiasm for Apple handhelds, encouraged users towards Mac in the workplace?

	0%	20%	40%	60%	80%	100%

- Yes, quite significantly
- Yes, to a degree — *(No responses)*
- No, not really — *(No responses)*
- Unsure

Users want Apple stuff primarily because of the brand and image – agree or disagree?

	0%	10%	20%	30%	40%

- Totally agree
- Agree on balance
- Neutral/unsure
- Disagree on balance
- Totally disagree

COMMENT: In addition to the general trend towards consumerisation, which Apple has undoubtedly played a part in driving, the widespread use of iPhones in a personal or consumer context has encouraged users towards Mac in the workplace. Given that the appeal, kudos and desirability of the Apple brand is a big driver of demand, we should not necessarily infer anything to do with fitness for purpose and tangible business benefit from this, but the user pull is undeniable.

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PART 2

Attitudes and Perceptions

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High level perceptions

Agree or disagree?

COMMENT: Not surprisingly given its track record, around two thirds of the sample agree that Apple is one of the most innovative players in the market. The number of respondents regarding themselves as fans, however, while still very high at around 50%, is lower, suggesting that even some that have respect for Apple's achievements do not regard Apple as perfect. How much of this has been influenced by polarised media coverage or genuine concerns is impossible to say, but from the perspective of using Apple in the workplace, the more pertinent question is how well the company understands and caters for business requirements.

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Understanding of customer requirements

Agree or disagree?

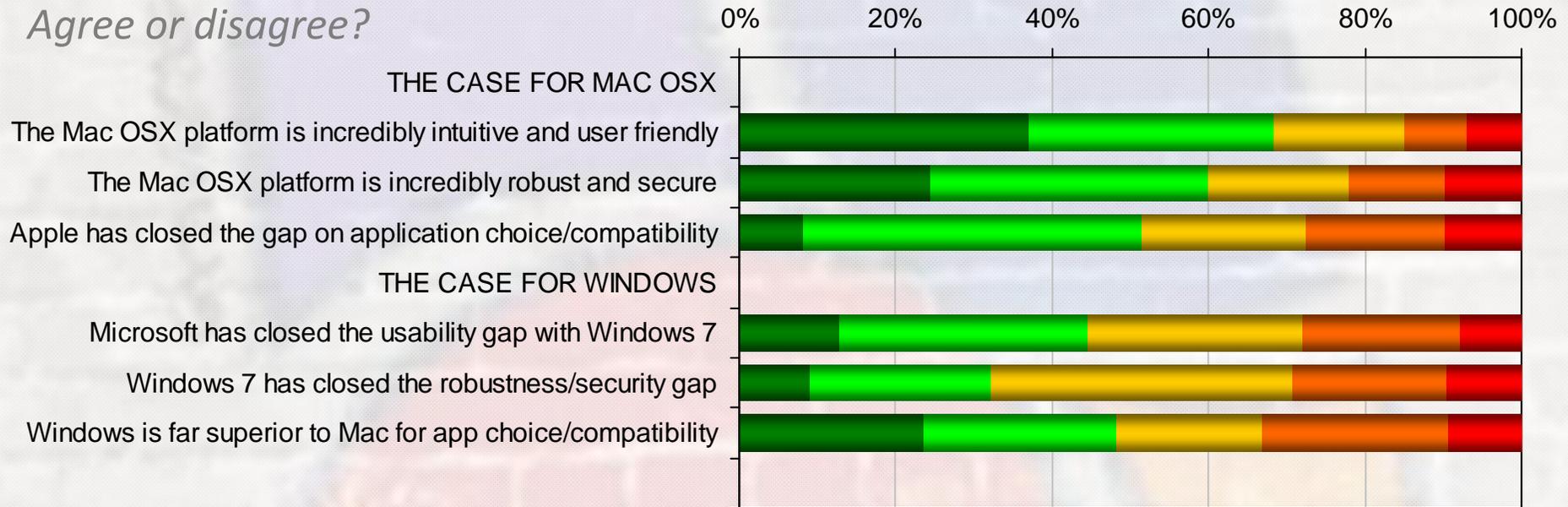Legend: ■ Totally agree ■ Agree on balance ■ Neutral/unsure ■ Disagree on balance ■ Totally disagree
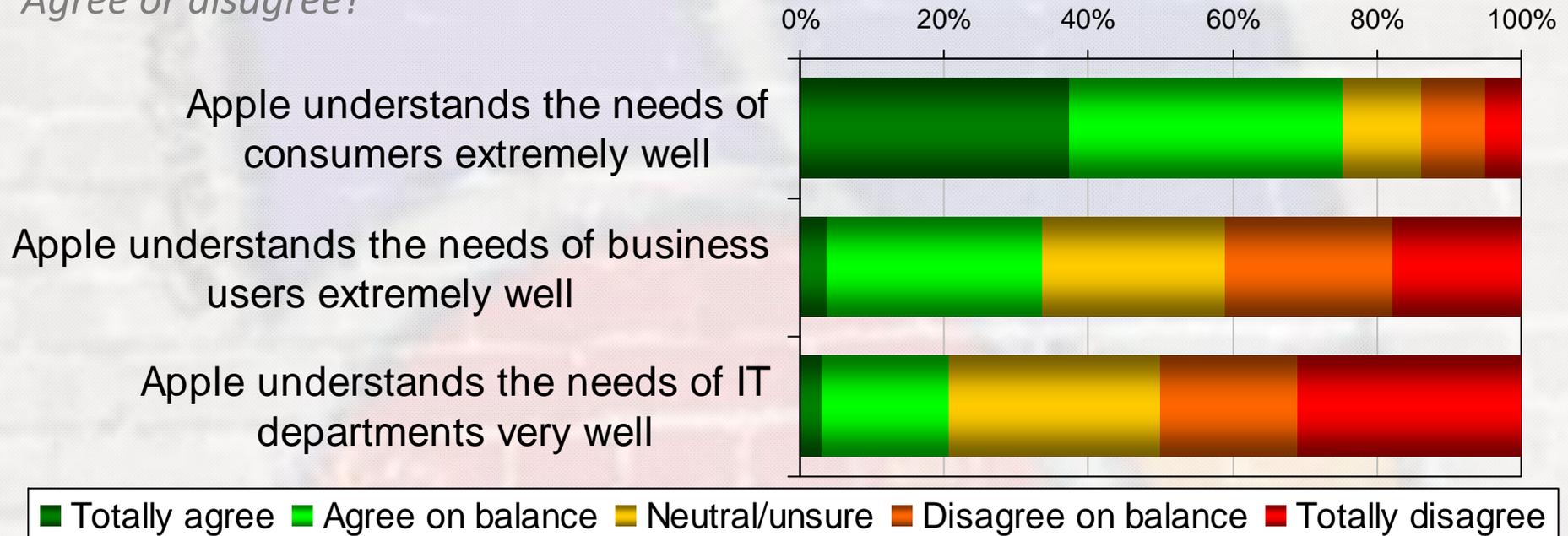
COMMENT: The message here is very clear: Apple is first and foremost a consumer company that is frequently perceived to have a limited understanding of the needs of business users and the IT professionals supporting them. To be fair, Apple doesn't dispute its consumer-centricity, but the upshot is that compelling though Apple kit is, it is often seen as representing a compromise in the workplace context. Whether it is the software compatibility or admin friendliness issues associated with Macs, or the battery life and software openness constraints of the iPhone, while users love the devices, Apple adoption often means living with limitations and workarounds.

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Mac OSX versus Windows

Agree or disagree?

THE CASE FOR MAC OSX
The Mac OSX platform is incredibly intuitive and user friendly
The Mac OSX platform is incredibly robust and secure
Apple has closed the gap on application choice/compatibility
THE CASE FOR WINDOWS
Microsoft has closed the usability gap with Windows 7
Windows 7 has closed the robustness/security gap
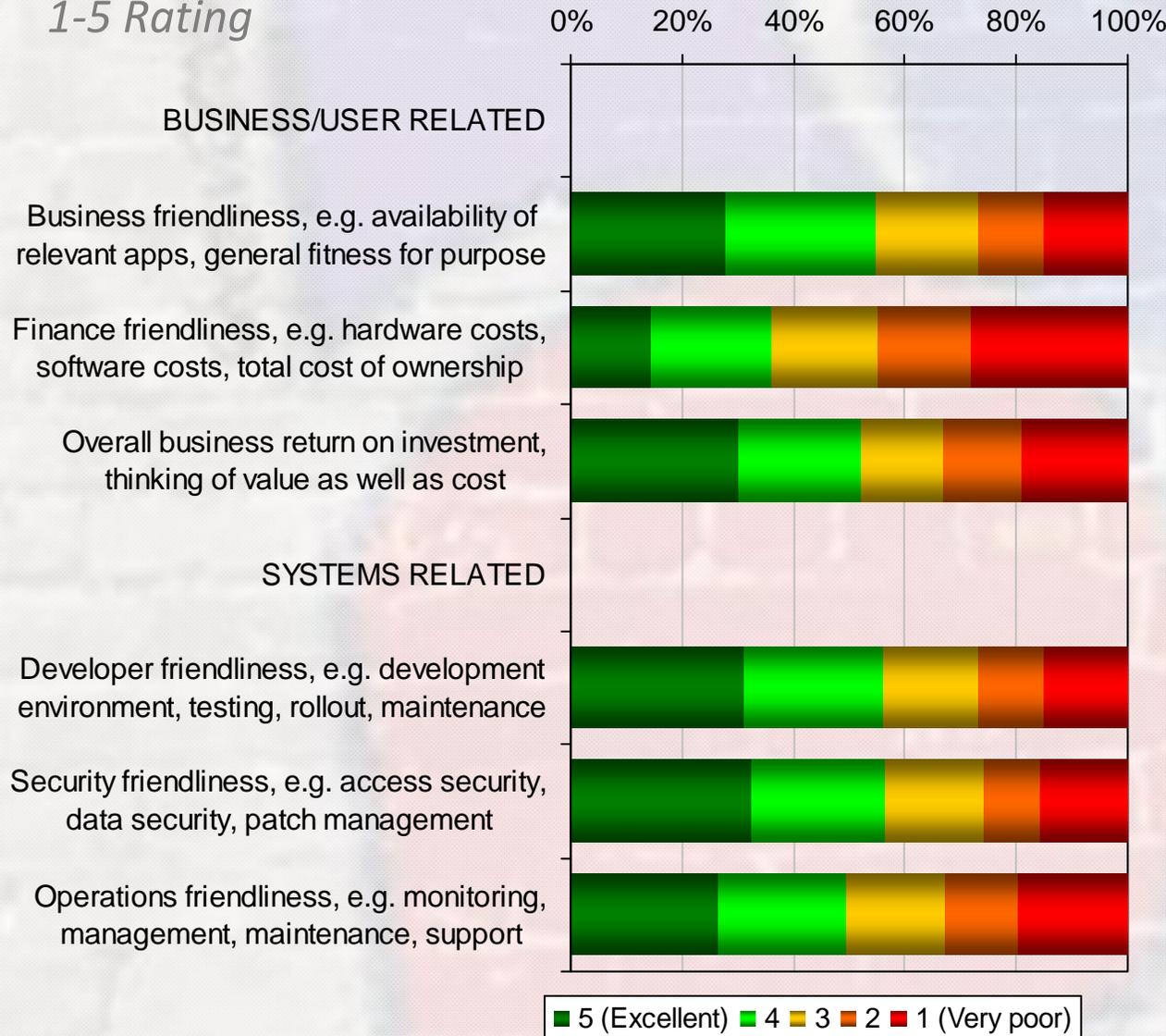Windows is far superior to Mac for app choice/compatibility

■ Totally agree ■ Agree on balance ■ Neutral/unsure ■ Disagree on balance ■ Totally disagree

COMMENT: The message from this Apple-centric sample is still that Mac OS X is superior to Windows on usability, robustness and security, and many believe that the software availability and compatibility gap with Windows has been closed. Conversely, there are quite a few who believe Microsoft has closed the gap on usability with Windows 7, though many still question the latter with regard to robustness and security. This lack of consistency, even polarisation of views, is a familiar picture, and often comes about because some Apple critics have limited experience of OS X, and many devoted Mac fans have limited experience of Windows 7.

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Mac OSX attributes and practicalities

1-5 Rating

BUSINESS/USER RELATED

Business friendliness, e.g. availability of relevant apps, general fitness for purpose

Finance friendliness, e.g. hardware costs, software costs, total cost of ownership

Overall business return on investment, thinking of value as well as cost

SYSTEMS RELATED

Developer friendliness, e.g. development environment, testing, rollout, maintenance

Security friendliness, e.g. access security, data security, patch management

Operations friendliness, e.g. monitoring, management, maintenance, support

0%   20%   40%   60%   80%   100%
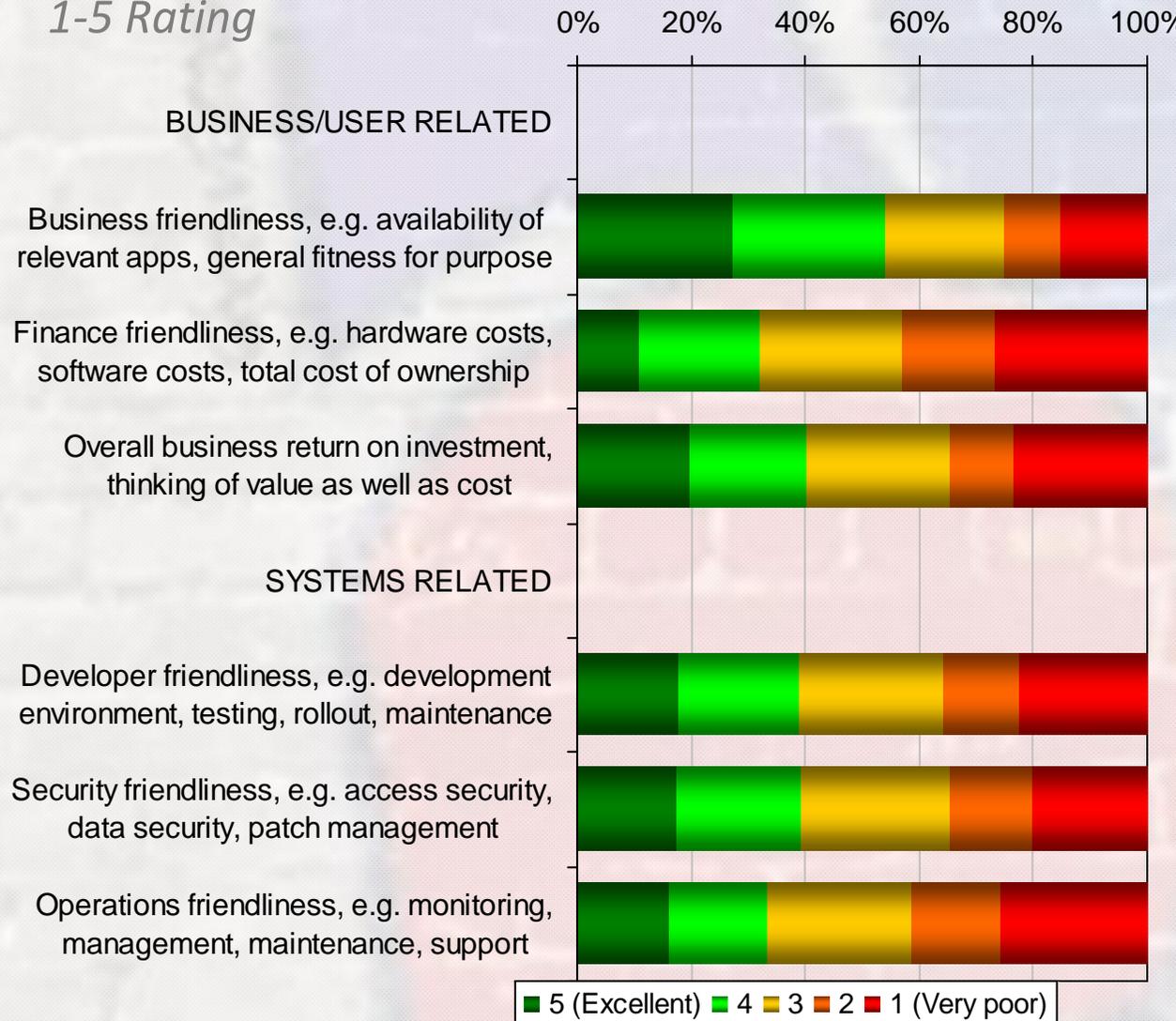
Legend: ■ 5 (Excellent) ■ 4 ■ 3 ■ 2 ■ 1 (Very poor)

COMMENT: Again we see a strong diversity of views. On the business/user side, perceptions are influenced by software requirements and the formality of adoption. On the systems side, it has more to do with scale and heterogeneity. Small Mac dominant estates seem to work well, but operational issues arise when OS X is deployed as just a smaller part of a larger Windows estate. In this and previous studies, IT professionals have also registered concerns about ops skills availability, the limited visibility of product roadmaps, sluggish patching cycles, and the perception of a closed and controlling culture.
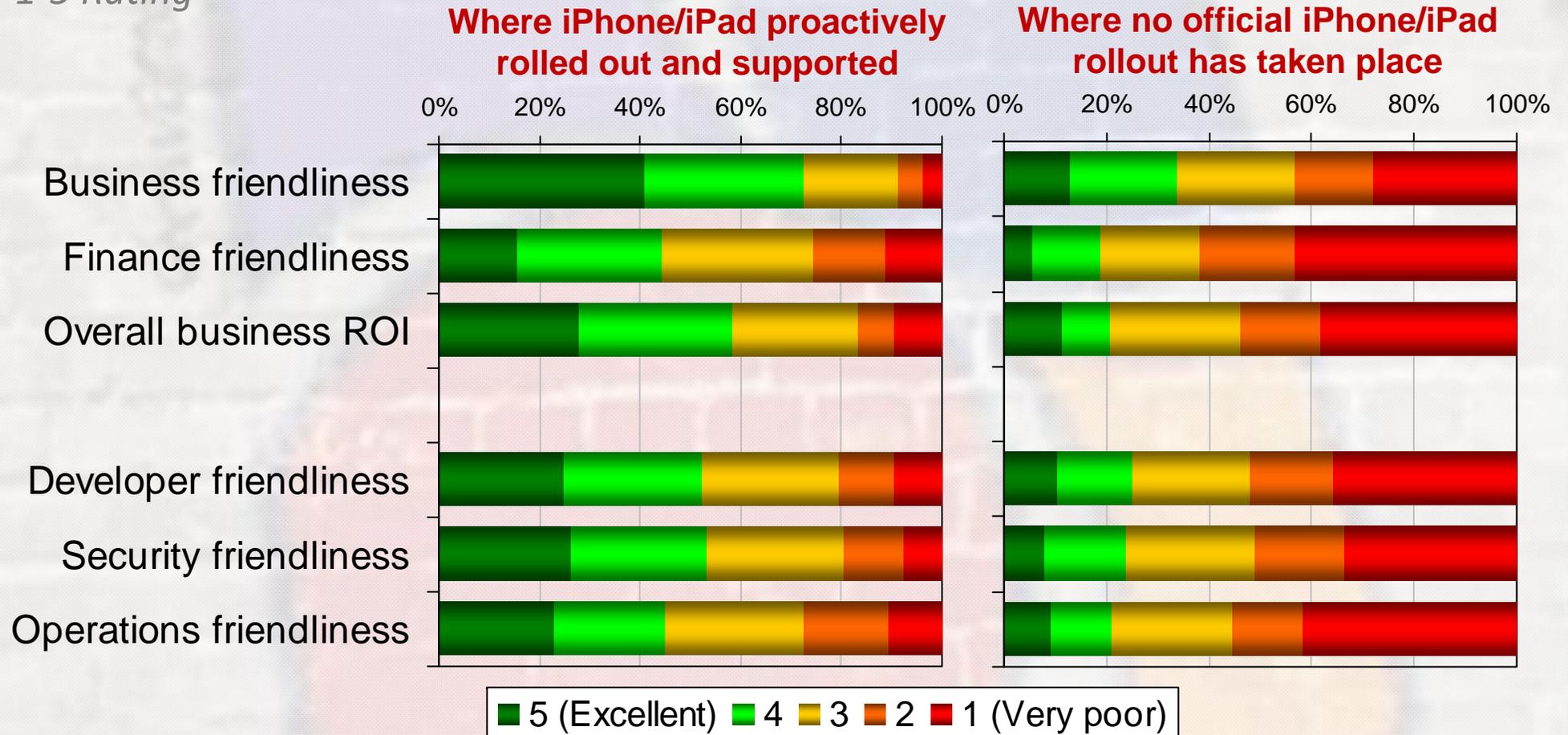
FREEFORM DYNAMICS

iPhone/iPad attributes and practicalities

1-5 Rating

BUSINESS/USER RELATED

Business friendliness, e.g. availability of relevant apps, general fitness for purpose

Finance friendliness, e.g. hardware costs, software costs, total cost of ownership

Overall business return on investment, thinking of value as well as cost

SYSTEMS RELATED

Developer friendliness, e.g. development environment, testing, rollout, maintenance

Security friendliness, e.g. access security, data security, patch management

Operations friendliness, e.g. monitoring, management, maintenance, support

■ 5 (Excellent) ■ 4 ■ 3 ■ 2 ■ 1 (Very poor)

COMMENT: Apple's handheld and slate devices are at first glance perceived to be less well-suited in general to business needs than Mac OS X, though again we see a wide range of views. On the user side, battery life is mentioned, with challenges around central management and monitoring coming up on the systems side. Differences in views on the iPhone and iPad, however, do seem to be more heavily influenced by ignorance and/or prejudice rather than context and practicality compared to the Mac , where feedback is generally more informed and specific.

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iPhone/iPad: Views of adopters versus non-adopters

1-5 Rating

Where iPhone/iPad proactively rolled out and supported

Where no official iPhone/iPad rollout has taken place

Legend: ■ 5 (Excellent) ■ 4 ■ 3 ■ 2 ■ 1 (Very poor)

Categories: Business friendliness, Finance friendliness, Overall business ROI, Developer friendliness, Security friendliness, Operations friendliness

COMMENT: This picture backs up the anecdotal evidence suggesting that while the iPhone/iPad platform is not perfect, it does represent an acceptable business solution if properly deployed.

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PART 3

The Bottom Line

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The Bottom Line

Agree or disagree?
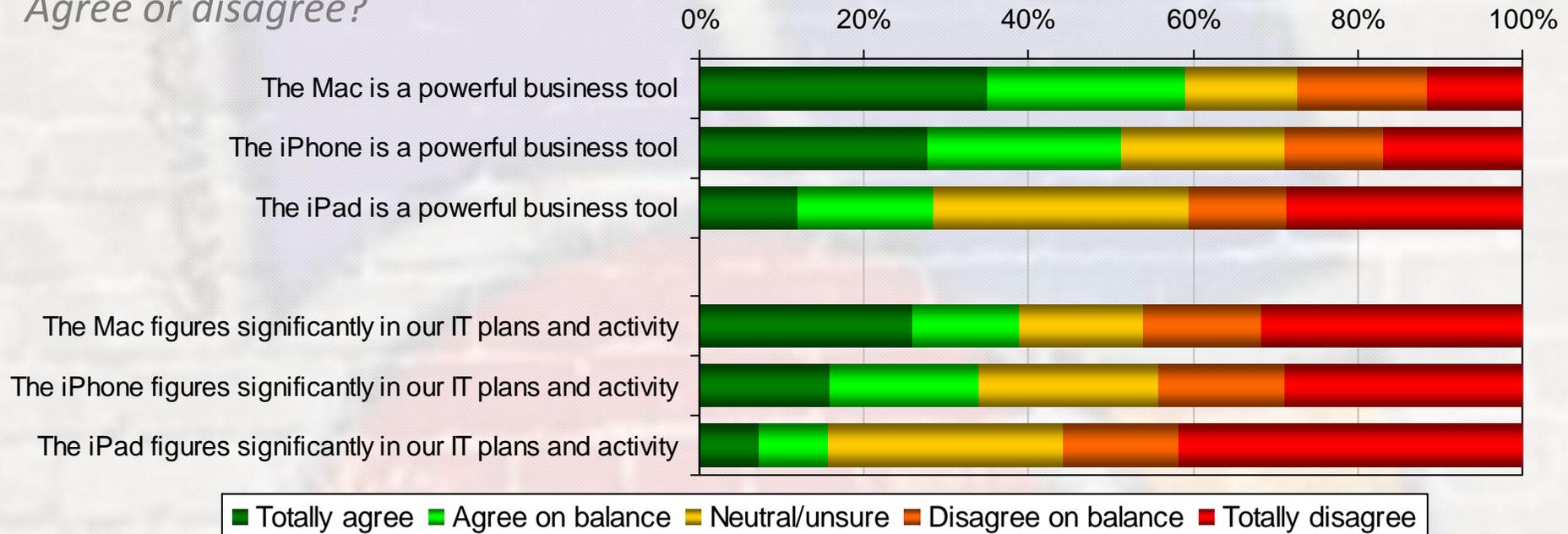
COMMENT: This chart puts Apple kit into its proper perspective, particularly as the sample is biased towards the Apple user community. In the right context, and deployed in the right way, Apple in the workplace clearly has a lot to offer, but is far from perfect for business use and far from dominant in the business environment as a whole. Given that Apple itself regards its offerings as primarily designed for consumers, this is hardly surprising. Furthermore, unless Apple has a change of strategy, this means that its penetration will continue to be heavily reliant on the consumerisation principle. How far this will take Apple into the workplace has yet to be seen.
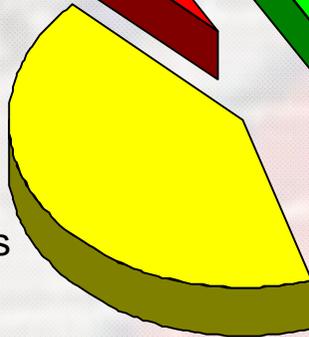
Organisational indicators from sample
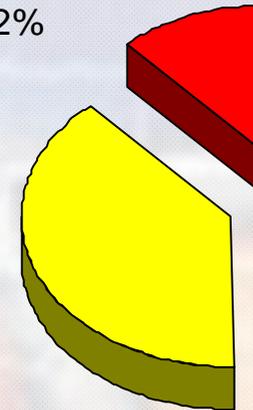

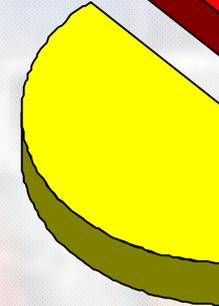Business is shrinking 5%
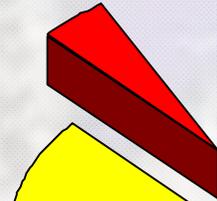
Business is growing 53%
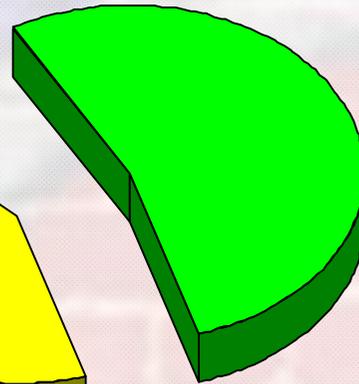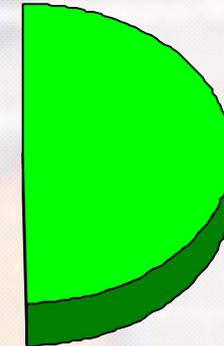
Business is stable 42%

We generally resist change as much as we can 12%

We accommodate change willingly where needed 39%

We often drive change to achieve business advantage 49%

COMMENT: As a final thought, these two common indicators of performance and culture show a much stronger position within our Apple-centric sample than the one we would normally expect across the business sector as a whole. Significantly more organisations are growing and a more positive attitude to change exists within the respondent base. Given the bias towards Apple users, which we know represent a minority in the overall market place, we can infer from this that Apple technology adoption is associated with more progressive and successful organisations.

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