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Goals of the Study

IDC’s Tablets in Enterprise multi-client study aims at assessing the opportunity of tablet deployment in the enterprise space across Europe and key geographies – France, Germany and the United Kingdom – as businesses embark on an accelerated adoption phase and transformation of their mobile computing infrastructure.

The study focuses on:

- Evaluating the current deployment status of Tablets in enterprises and assessing its potential development over the next two years
- Analysing the needs by vertical sector in terms of applications as well as product specs and usage requirements for Tablets
- Understanding the key influencers and decision makers in the decision process regarding tablet purchasing and deployment
- Developing a competitive benchmark of Tablet suppliers
- Evaluate the integration of Tablets in the companies’ security and mobile device management strategy
Study Scope and Definitions

The scope of the study includes the entire Tablet and Hybrid devices product spectrum:

- **Tablet slates**
  Tablet slates are portable, battery-powered computing devices in a slate form with touch capabilities as primary input method. Tablet slates do not have an attached keyboard. They can however be connected to an accessory keyboard.

- **Hybrids**
  There are two types of hybrids depending on whether the keyboard is detachable or not.
  
  - **2-in-1s (with detachable keyboard)**
    2-in-1s are portable, battery-powered computing devices with touch capabilities that are designed to function as a stand-alone as well as a clamshell device comparable to a Notebook PC through the addition of a physical keyboard component made specifically for the device. The keyboard must be from the same manufacturer of the tablet and designed specifically for the slate portion and attach through a physical connection. 2-in-1s are referred also as devices with detachable keyboard.

  - **Convertibles (with rotatable or slidable keyboard)**
    Convertibles are portable PCs equipped with an integrated keyboard and display that can be used in either a traditional notebook configuration (open clamshell with keyboard accessible) or a slate configuration (flat with no keyboard showing). The convertible function is often achieved with a rotating or swiveling hinge but can also use other designs such as slide-out. Convertibles are also referred as hybrid devices with non-detachable keyboard.

*Otherwise indicated, throughout the report the word “Tablet” includes both Tablet Slates and Hybrid devices*

Images courtesy of /Images: Apple, Samsung, Panasonic, HP, Microsoft, Dell, Lenovo
Methodology
Methodology

- **Coverage:** The study was based on a telephone-based survey of 1,218 enterprises across the Top three European countries
  - France — 404 interviews
  - UK — 406 interviews
  - Germany — 408 interviews

- **Target Respondents:** IT decision makers (ITDM) and Line of Business managers

- **Vertical Segmentation:**
  - The survey sample followed a balanced share between sectors for representativeness purposes. For the analysis of the final results, the data has been weighted by sector and company size based on the respective countries’ business demographics.

<table>
<thead>
<tr>
<th>Verticals</th>
<th>UK</th>
<th>France</th>
<th>Germany</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing (incl. Construction)</td>
<td>60</td>
<td>60</td>
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<td>Transport, Storage</td>
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<td>Utilities</td>
<td>20</td>
<td>20</td>
<td>20</td>
<td>60</td>
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<tr>
<td>Distribution (Retail/Wholesale)</td>
<td>40</td>
<td>40</td>
<td>40</td>
<td>120</td>
</tr>
<tr>
<td>Hospitality/Accommodation</td>
<td>40</td>
<td>40</td>
<td>40</td>
<td>120</td>
</tr>
<tr>
<td>Finance/Insurance</td>
<td>30</td>
<td>30</td>
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<tr>
<td>Government</td>
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<td>30</td>
<td>30</td>
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<tr>
<td>Education</td>
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<td>150</td>
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<tr>
<td>Professional Services</td>
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<td>40</td>
<td>40</td>
<td>120</td>
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<tr>
<td><strong>Total</strong></td>
<td>400</td>
<td>400</td>
<td>400</td>
<td>1,200</td>
</tr>
</tbody>
</table>

- **Target Company size:** Proportionate mix of small (10-99), medium (100-499) and large enterprises (500+)

- **Timescale:** Fieldwork was carried out between June and September 2014.
Demographic & Profile of Companies
Countries and Verticals

**Country Breakdown**
- Germany: 33.5%
- France: 33.2%
- UK: 33.3%
- N = 1218

**Vertical Breakdown**
- MANUFACTURING/CONSTRUCTION: 192
- EDUCATION: 150
- HEALTHCARE: 150
- TRANSPORT AND STORAGE: 121
- DISTRIBUTION (Retail/Wholesale): 120
- HOSPITALITY/ACCOMMODATION: 120
- GOVERNMENT: 92
- FINANCE/INSURANCE: 90
- UTILITIES: 60
- PROFESSIONAL SERVICES: 123
Company Size

Company size breakdown

- 10-99 employees: 37.0%
- 100-499 employees: 35.2%
- 500+ employees: 27.8%

N = 1218

Company size breakdown by vertical

<table>
<thead>
<tr>
<th>Vertical</th>
<th>10-99 employees</th>
<th>100-499 employees</th>
<th>500+ employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANUFACTURING</td>
<td>39%</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>UTILITIES</td>
<td>21%</td>
<td>24%</td>
<td>55%</td>
</tr>
<tr>
<td>TRANSPORT AND STORAGE</td>
<td>38%</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>DISTRIBUTION</td>
<td>48%</td>
<td>24%</td>
<td>29%</td>
</tr>
<tr>
<td>HOSPITALITY/ACCOMMODATION</td>
<td>63%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>FINANCE/INSURANCE</td>
<td>17%</td>
<td>24%</td>
<td>59%</td>
</tr>
<tr>
<td>GOVERNMENT</td>
<td>17%</td>
<td>29%</td>
<td>55%</td>
</tr>
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<td>HEALTHCARE</td>
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<td>44%</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>25%</td>
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<td>34%</td>
</tr>
<tr>
<td>PROFESSIONAL SERVICES</td>
<td>40%</td>
<td>28%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Profile of Respondents

IT vs Line of Business (LoB)

- IT: 79%
- LOB: 21%

N = 1218

IT Job Titles

- IT Manager: 63.7%
- IT Director: 12.3%
- CIO/CTO/VP/Head of IT: 8.9%
- Managing Director / CEO / Owner: 3.9%
- CFO/Finance Director or Manager: 2.4%
- Other IT decision-maker: 8.9%

LoB Job Titles

- Sales or Business Development...: 20.2%
- Marketing Manager: 11.9%
- Operations Manager: 10.2%
- Production Manager: 12.6%
- Head of Customer Service: 5.0%
- Logistics and Distribution Manager: 1.6%
- Other LoB decision-maker: 38.5%
Executive Summary
Executive Summary

- Over two thirds of companies already have tablets and near 70% plan to purchase tablets within the next two years.
- Tablets account today for over 6% of total business devices. Penetration is expected to accelerate and reach 11% in 2015 and surpass 15% by 2018.
- Across verticals, the share of tablets ranges between 4.5% and 11.7%. Penetration is currently the highest in Transport and Distribution thanks to a large mobile workforce. Hospitality, Healthcare and Government are expected to experience the fastest growth over the next 3 years.
- Most companies are in early/mid-stage adoption and continuing to equip in 2H14-2015 with significant expansion plans across several sectors.
- Employee productivity is a key deployment driver, followed by Customer facing engagement, in particular in Hospitality, Distribution and Healthcare. Business transformation is an additional driver for small businesses.
- Executives remain key users but over 60% of users are now in LoBs thanks to declining price points and increasing vertical applications availability meeting new needs and functions.
Executive Summary

- The dominant form factor remains slate but physical keyboard as key input method in addition to touch supports demand for 2-in-1s or convertibles. Hybrid adoption is expected to grow significantly in the coming two years.

- As tablet adoption expands, screen size requirements expand. Smaller slates (5-6 in.) are in demand in Healthcare and Services while demand for larger hybrids (+15in.) is in Government, Utilities and Transport, outlining the need for vendors to prepare their offering to meet expanding specific needs.

- Only a third of tablets are 3/4G enabled with two thirds being activated, outlining that while tablets answer the needs of mobile workers who need to be connected all the time, they also address the needs of a less mobile population leveraging internal company network infrastructure.

- In terms of OS, preference shows Windows for hybrids and Android or iOS for slates. Seamless integration being a key criteria for OS choice, the question becomes a productivity one towards PC or a usage/apps one with smart phones. Benefiting from improved security perception, Android could have a larger opportunity now in the business space from that perspective.
Battery life is across all form factors and sectors a key product feature, followed by Voice capabilities and 3/4G for mobile usage and Security. As adoption expands, the need for additional features also expands, with for example demand for ruggedized devices seen in several sectors, or credit card or barcode scanners required in Hospitality, Distribution are also required now across other sectors such as Transport and Healthcare.

Tablet slates are used primarily as an additional device at 57% but are also used as only device in over 40% of the cases. Hybrids are used by the majority as only device (although 51% only), with 2-in-1s often used as additional device while Convertibles are the only device at over 70%.

Tablets address new user segments and in particular mobile workers whose activities do not take place in an office space but “on-the-road” (drivers, pilots, couriers…) or field agents, meter readers, operation personnel. A large opportunity is also on Customer facing roles and clients themselves thanks to the increasing importance for businesses of customer experience, omni-channel and related supporting apps.
Executive Summary

- Tablet usage is often mixed between general and vertical applications. The ability to partner with ISVs or to offer tailored apps is key to approach vertical markets.

- Tablets enter businesses via LoBs at 20%. IT is involved in all cases but over 40% of the decision process is via LoBs with crucial role of CEO. Co-decision process demonstrates the need for hardware vendors to reach out beyond IT departments and position themselves to both IT and LoBs as well as C-level as providing a business solution.

- As regards to brand and supplier choice, the results outline some level of contradiction. While respondents mention “compatibility with existing platform”, “existing relationship” or “product offering across multiple devices” as key criteria when choosing a supplier, their brand choices for portable PCs and tablets reflect a broader reality. The results show limited correlation between the current portable PC brand and the brand choice for Tablets with only a slightly higher proportion of likelihood to acquire the same brand for tablets – at least currently.
For applications not included with the device, the preferred approach is in-house development or custom apps built by partners for specific business processes or needs.

Apple and Android are perceived as more secure than Windows, Linux or BlackBerry platforms, with both Apple and Android felt to have appreciably improved the security of their offering in the last year.

Most companies use the default device management tools from the vendor. There is a desire to move to specialized tools in future, but this budget will have to compete with other priorities.

Routes-to-market show a rather fragmented picture. Compared to traditional PC channels, Resellers and SIs are less favoured with mobile phone operator or mobile retailers ranking high. As Tablets gain more traction in business and applications become more widely adopted, this will put pressure on the mobile phone channel to adopt PC solutions type capabilities, and increase the importance of the PC channels for Tablets.
Take Aways and Recommendations
Take Aways/Recommendations

- **User Base Expansion** – The acceleration of tablet adoption across all sectors and reach to new users and functions beyond traditional IT users offers a key opportunity for the industry. As the user base and usage scenarios expand, needs and requirements are however also rising and will require vendors to drive simultaneously increased commoditization and targeted strategies.

- **Importance of Verticals and Solution Approach** – The survey also outlines the importance of verticals and the need for vendors to develop a solution approach (including for horizontal and cross-functional roles) from both a marketing and product positioning standpoint (usage, applications and related product features) to offer businesses the solutions they need.

- **Decision Process** – Vendors need to reach out to both IT and LoBs. The decision process around tablets is often a joint one, with LoBs having a key role in defining their needs and in the solution choice.

- **Form Factor Choice** – While device choice expands, vendors need to help ITDM/LoBs choose the right solution and convey a clearer value proposition between Slates, 2-in-1s, Convertibles, Touch and Large phones, defining input method, mobility needs, screen size requirement and usage.
Take Aways/Recommendations

- **Application Development** – To tap into the preference for custom applications and access via browsers to on-premises web servers or Cloud services, Tablet vendors should be forming wide ranging ISV programs to draw in in-house and contract/outsourcing developers that focus on the digitisation and integration of business processes and key applications.

- **Mobile Device Management** – Vendors looking to grow their multi-device open MDM solutions have a market that understands the need for better device management and intend to invest in this area in an ideal world, but work is needed on the sales strategy and particularly the funding model in order to gain the expected traction due to competing investment priorities in IT.

- **Routes-to-Market** – As Tablets mature and move from accessory devices to the main device, buying patterns will start to shift. PC centric vendors will need to better engage the mobile phone channel in order to reach customers through the preferred buying model, while mobile phone centric Tablet vendors will need to engage with the PC channel with end-to-end solutions and lifecycle capabilities.
Key Findings Analysis
We plan to purchase in the next 12 months: 4.0%

We plan to purchase in the next 24 months: 7.8%

We plan to purchase in more than two years: 5.3%

Currently evaluating: 7.8%

Early stage - still evaluating: 21.6%

Medium stage - expect to expand: 28.7%

Advanced stage - no further expansion planned: 7.6%

Evaluated and decided not to buy: 17.2%

Two thirds of companies already have tablets and almost 70% plan or are likely to purchase tablets within the next two years.

Within the companies that already have tablets, the vast majority are in early/mid-stage adoption and expected to continue equipping in 2014/2015. Only 10-15% do not plan further expansion thus representing a likely replacement market.

Among companies that do not have tablets yet, approx 50% of are currently evaluating or planning to purchase tablets within two years while an additional 20% will buy in more than two years.

Across verticals (excl. Education), the percentage of companies that have decided not to buy does not exceeds 15% with Transport and Professional Services more likely to buy in the short-term.
Tablet Penetration Today

QA1 How many computing devices, purchased by your company, do you have in total in your company?

- Tablets represent today over 6% of total client devices with France, UK and Germany sharing a similar picture on the sample.
- Across verticals, penetration ranges between 4.5% and 11.7% with Transport and Distribution leading the way thanks to their more mobile workforce.
- Penetration is still low in sectors where there are higher volumes of deskbound employees such as Government or where the use of computing client devices is typically low (ex. Hospitality).

N = 1218
(Percentage of total devices in the sample)
Aggregate data for All countries (France, UK, Germany) and company sizes (10 – 500+)

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Tablet Penetration Evolution

QC4 How much do you think Tablets or Hybrids will represent in terms of percentage of your total devices in use within your organization next year in 2015, and in 3 years time (eg. 2018)?

- As workplace mobility increases, tablet penetration is expected to accelerate and reach 11% in 2015 and exceed 15% in the next three years.
- The acceleration is anticipated to occur in all sectors; yet growth will gain momentum in particular in Hospitality and in some pockets of the public sector where by 2018 tablets are predicted to account for around 17% of total client devices.
- Similar high penetration rates can be expected in the Transport and Healthcare as the sectors act on their short-term deployment plans.

N = 649
Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
Tablet Adoption Drivers

 QB8 What do you see as key reasons or motivating factors for deploying Tablets in your organization?

- Increasing employees’ productivity is the key driver for tablet deployment in all sectors but Utilities where tablets are adopted mostly to fulfill business needs not completely satisfied by traditional computing devices.
- Customer facing engagement is also a key motivating factor especially in Hospitality, Distribution and Healthcare.
- Business transformation is a key driver for small businesses (up to 99) and appears to be considered an important element in the UK rather than in France or Germany.
- In France on the other hand, tablets are more likely to be seen as a means to drive an innovative company image.

- Increase Employee Productivity: 62.4%
- Improve Customer Facing Engagement: 47.8%
- Drive Innovative 'Company Image': 36.2%
- Fulfill Some Business Needs/Apps Not Fulfilled by Traditional Computing Devices: 31.5%
- Business Transformation: 28.4%

N =1010 (Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
Form Factors – Today/Expected

**QA4 What types of tablet or hybrid device does your organization have?**

- **Today**
  - Tablet Slates: 75.9%
  - 2-in-1s: 18.5%
  - Convertibles: 5.6%

- **Intended purchases**
  - Tablet Slates: 67.4%
  - 2-in-1s: 22.2%
  - Convertibles: 10.4%

- **N = 737** (Percentage of devices)

- **N = 1191** (Percentage of devices)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

- Slates are and will remain the preferred form factor. Further a majority of slates are used as additional devices except in France and in the Utilities sector.

- After touch, physical keyboard is a key input method supporting the growth of hybrids. Large companies (500+), Utilities, Transport and Government are leading adoption.

- The low penetration of convertible today is strongly related to premium prices, limiting deployment to very specific target groups. But convertibles penetration is expected to increase the fastest. Their use is similar to notebook with 70% deployed as only devices.

- The offer for 2-in-1 has expanded lately and could be considered as attractive for the last 18 months. This might explain the low penetration today in comparison to the slates. However, every one out of five devices will be a 2-in-1 by 2015. This form factor will be used as only device except in Germany considering it as companion.
QC7a. – Regarding the Tablet Slates or Hybrid devices that you plan to provide your employees with, which screen size would you envisage for them in inches?

- Tablets with screen size between 9 and 10 in. are used in the vast majority of sectors and this format will remain dominant.
- Smaller screen sizes appear today as relevant in sectors with strong mobility needs like Utilities, Transport and Hospitality.
- The request for larger and smaller screens emerge strongly with larger screens more in demand for hybrids, which appears logical as standard screen size for notebook is 15 in.
- The expanded use of tablets and the diversity of usage scenario explain that Government and Health are looking for slates below 7 in., while Transport and Utilities search for 15inch + devices.

N (Today)= 515; N (Intended Purchases) = 502
(Percentage of responses)
Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Connectivity

QA7a. What percentage of your current tablets* are WiFi only, and what % are 3G/4G enabled?

- The majority of devices deployed today are WiFi, indicating that either enterprises rely upon internal infrastructure or use the device in combination with smart phone for mobile users. It means clearly also that many devices are used within the company walls only.
- More than a third of devices used in enterprise are 3G/4G enabled. Further all devices are not activated, only 2/3 are deployed with a data plan. The need for all the time connectivity seems limited to certain users.
- Germany is an exception with the majority of devices being 3/4G enabled.
- In terms of sectors Manufacturing and Professional Services are also the exception, having a majority of devices being 3G/4G enabled, reflecting also specific user needs.

N = 664
(Percentage of devices)

* Tablets include Tablet Slates and Hybrid devices

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)
Product Requirements

**QD5** Using a scale of 1 to 5, where 1 = not at all important and 5 = extremely important, please indicate which of the following features are important for your tablet or hybrid devices.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Battery Life</td>
<td>75.6%</td>
</tr>
<tr>
<td>Voice Capabilities</td>
<td>65.2%</td>
</tr>
<tr>
<td>Security Features</td>
<td>60.0%</td>
</tr>
<tr>
<td>Outdoor Readable...</td>
<td>58.0%</td>
</tr>
<tr>
<td>Design,...</td>
<td>53.9%</td>
</tr>
<tr>
<td>3G/4G Enabled</td>
<td>53.3%</td>
</tr>
<tr>
<td>Serial/Parallel/USB/...</td>
<td>52.0%</td>
</tr>
</tbody>
</table>

N = 830 (Sum of 4 and 5 rankings)

- Beyond screen size, OS and form factor, one key product feature is battery life. As mobile devices, tablets have to function long without recharging across all sectors.
- Voice capabilities are the second feature on the list and if combined with 3G/4G enabled device requirement, it confirms tablets used as phone or collaboration devices.
- Security is another key requirement (see Security slide)

**QD7** Considering your business/organization's needs, which of the following ADDITIONAL FEATURES are important to have on your Tablet or Hybrid devices?

- Additional product features answer differentiation needs for vertical usage and applications.
- Ruggedized tablets are very much in demand in Utilities and Government.
- Barcode scanner are key for tablet usage in Distribution, Transport and Health sectors.
- Smart or credit card reader are very important for Hospitality but increasingly too for other sectors.

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Managing multiple OSes is recognized as a challenge for half of the surveyed companies. Consequently the seamless integration with other OS and ability to scale appear as key criteria for decision making.

However the divide starts when integration with Windows environment is considered for the hybrids while integration with mobile smartphone OS is considered for slates.

The challenge becomes apps and usage. In a productivity and general apps environment (PC approach), Windows appears as the favourite. In a more apps specific including voice and more mobile cases (smartphone approach), iOS and Android seem to better allow integration.
Tablet User Expansion

QA11 Who are Top 3 users of the Tablets purchased by your company?
QC5. For which users do you consider purchasing tablets for?

- Executives are key users of tablets and are expected to remain as such in the future. However, thanks to declining price points and increasing device and apps verticalisation, over 60% of tablet users are in LoBs (excluding Sales).
- LoBs also represent an important opportunity for Tablet deployment expansion as they provide new user types and functions.
- New tablet users can be found among mobile workers whose activities do not take place in an office space but “on-the-road” (drivers, pilots, couriers...) or in the field (maintenance agents, meter readers, operation personnel...).
- A large opportunity for the tablet market also comes also from Customer facing roles and clients themselves thanks to the increasing importance for businesses of customer experience, omni-channel and related supporting apps.

- White Collars include analysts, consultants, doctors, legal, journalists etc.
- Transport include drivers, delivery personnel, etc.
- Customer Facing include shop floor staff, waiters, airport personnel etc.

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

N(A11) = 737
N(C5) = 800
(Percentage of responses)
Mobile Platform Relevance

B1 Using a scale from 1 to 5*, how relevant the following computing devices are for your organization and business needs?

- Traditional notebook with touch capabilities are perceived as the most relevant computing platform. If adding ultraslim with touch, overall notebook with touch seems promising, while adoption so far has been limited. The pertinence of touch with windows 7 is very limited and might explain the gap with those results as well as the premium prices of devices.

- Slates rank as the second most relevant device, confirming the market potential and readiness. Utilities, Transport, Distribution and Manufacturing show the highest scores, a sign that the specific sector needs are answered by tablets.

- Large smartphones are mentioned as relevant especially within Transport, Distribution and Manufacturing. While covering similar needs, tablets with cellular capabilities score low in general except in the Utilities and Transport area, outlining a strong difference in perception.

- Hybrids (2-in-1s and convertibles) may appear as less relevant but it varies per sector: scores in Utilities, Transport, Finance and Government are high.

- Chromebooks do not seem relevant, the concept may also not be well known and understood.

N = 1218
(Total percentage of 4 and 5 ratings)
* 1 is not at all relevant; 5 is extremely relevant

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Tablet Usage Scenario

Combines QA11. Who are Top 3 users of the Tablets purchased by your company? and

QA12a. What type of product do they have?

The majority of tablet users currently uses a slate form factor in addition to another device to perform their business activities. Additional devices tend to be desktop or portable PCs, smart phones or workstations.

More than 40% of slate users are now relying solely on their tablet which are taking the place of desktops (especially in customer facing roles) and specialised handheld devices or are now provided by employers instead of company smart phones. Increasingly more however are also tablet slates deployed to carry out activities previously not supported by any computing device. This incremental opportunity is especially observed in customer facing roles.

Among hybrids, 2-in-1s are largely preferred. They are less common than slates but future purchase intentions suggest that their share will increase as a physical keyboard remains a crucial input method in most job functions. Hybrids, especially convertible, tend to be used as a only device replacing more often portables and desktops, but also – depending on the user function – smart phones or handheld devices.

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excl. Education
Applications

QC13a/b. Which General Business and Enterprise applications would you consider using on Tablets or Hybrids for your organization?

- Tablets are computing devices and consequently used for standard office applications first, followed by collaboration and web browsing.
- For general applications, considering that tablet are used as primary devices in many instances, they have clearly to fulfil the same tasks as notebooks, hence the similar apps.

For vertical applications, the deployment is broader and differences emerge by sector.
- For Utilities, engineering apps are the first choice, in line with the first user group of this sector (R&D).
- Distribution favours customer service apps and have supply chain management high in their preferences.
- Healthcare put electronic prescription and diagnostic tools apps high on their list.

QC13c. Which Vertical applications would you consider using on Tablets or Hybrids for your organization?

N = 1010
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany); all company sizes (10 – 500+) and all verticals
Decision Making Process

QB7. Who in your organization is responsible for or involved in Initiating the request for Tablets? Influence the deployment decision, product choice? And Making the final decision as regards to deployment and product choice?

- Tablet deployment is in most cases a joint decision between IT and LoBs.
- LoBs have a critical role on the process initiation and on the product choice. As some devices have to answer specific users or sector needs, their role in the process and on product choice is essential.
- IT departments are playing a key role in all phases of the process, for both budget ownership reasons and their central role on the implementation which gives them a stronger responsibility towards purchase, hence their weight on product choice and decision.
- C-levels seem to be involved at all stages of the decision making process. This relating to the strategic choices made, the productivity gains or the company image to be obtained with the device adoption decision.
Brand and supplier choice criteria show some level of contradiction.

While compatibility with existing platform, existing relationship or cross-device offering rank high in a supplier choice, the results show limited correlation and brand loyalty between portable PC and tablet brands, with the partial exception of Apple.

The strong share of Apple and Samsung in terms of brand likelihood have to be seen in light of their longer established tablet position and to the share of slates, while mainstream commercial tablets from traditional PC vendors were introduced later to the market, and at higher price points that standard notebook.

Compatibility with existing platform is clearly dominating the vendor selection process, which could favour all windows based portable PC vendors as well as Android phone vendors or iOS. This is reinforced by product offering for multiple platforms.

The ability to provide global solution seems to be another aspect in identifying the right vendor.
B/C/UYOD

QA20A Does your organization have a formal policy allowing employees to Bring, Choose or Use their own mobile device for work-related purposes?

- The majority of companies do not have a policy for employee bringing or using their own devices in all three countries.
- When adopting a policy, CYOD is preferred over BYOD overall.
- There are some strong differences between France, Germany and UK related to various cultural business approaches.
- Germany seems to be the most advanced with a third of the companies declaring having a BYOD or CYOD policy, which may be attributed to a stronger compliance culture.
- The UK appears as more flexible and tolerating the use of personal devices (UYOD), in line with a usually more flexible approach to mobility and remote working.
- France has a significant proportion of companies without any policy and not authorizing devices, which might be either a sign of control or of denial.

N = 1068 (Percentage of responses)

Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education
Applications Development

QE2 For the applications currently running on your Tablets and/or Hybrids, where were they developed?

- The business application market for tablets is still emerging
- For most verticals, there are few off the shelf applications that suit their requirements
- Business applications are developed in-house or with partners
- Hospitality, Health and Education are able to use more off the shelf applications to meet their needs

N = 734
(Percentage of responses)
Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Applications Management

QE3 Where can employees download applications for Tablets and/or Hybrids from in your organization?

- With many applications being custom developed, there is a strong preference for in-house managed enterprise App stores.
- With Apple devices and operating system being so closely linked, the device vendor App store is popular.
- Operating system vendor App stores are likely to gain in popularity as the Tablet market diversifies.

N = 565 (Percentage of responses)
Aggregate data for all company sizes (10 – 500+) and all verticals.
Applications Management - B/C/UYOD

QE5. How does your company manage the installation of applications on BYOD/CYOD/UYOD Tablets?

- Taken as a whole, there is a lot of freedom to install company Apps on devices that are not company owned.
- UK is the most liberal, while France is the most guarded, when it comes to installing company Apps on personal devices.

N = 107 (Percentage of responses)
Aggregate data for all company sizes and verticals

QE6. Which of the following types of dedicated device management software have been deployed to manage your devices?

- DEVICE VENDOR DEVICE MANAGEMENT SOFTWARE
- SOFTWARE VENDOR DEVICE MANAGEMENT SOFTWARE
- SPECIALIST INDEPENDENT DEVICE MANAGEMENT SOFTWARE
- GENERAL IT MANAGEMENT SOFTWARE
- NO DEVICE MANAGEMENT SOFTWARE DEPLOYED

<table>
<thead>
<tr>
<th>Software Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEVICE VENDOR DEVICE MANAGEMENT SOFTWARE</td>
<td>46.1%</td>
</tr>
<tr>
<td>SOFTWARE VENDOR DEVICE MANAGEMENT SOFTWARE</td>
<td>40.3%</td>
</tr>
<tr>
<td>SPECIALIST INDEPENDENT DEVICE MANAGEMENT SOFTWARE</td>
<td>30.6%</td>
</tr>
<tr>
<td>GENERAL IT MANAGEMENT SOFTWARE</td>
<td>28.8%</td>
</tr>
<tr>
<td>NO DEVICE MANAGEMENT SOFTWARE DEPLOYED</td>
<td>13.4%</td>
</tr>
</tbody>
</table>
Mobile Device Management Approach

QE7 When it comes to device management across Smartphones, Tablets and PCs, which statement best describes the situation you are in today, and where would you like it to be two years time?

- Most companies do not invest in specialized tools for device or application management.
- There is a universal appreciation of the needs for better and more integrated management, but getting the funding will be the challenge.
- UK is appreciably ahead of France and Germany when it comes to centralized device management, which helps explain the freedom with which applications can be deployed to devices.

N = 735
(Percentage of companies)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
QE9. How would you prefer your Multi/Mobile Device Management solution to be?

- **Installed and run on premises**: 49.9%
- **Installed on premises and managed from reseller/integrator's operations centre as a service**: 21.9%
- **Run from the Cloud**: 17.6%
- **Installed and run from reseller/integrator's operations centre as a service**: 10.6%

**N = 735** (Percentage of companies)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education

- Most companies are reluctant to use a Cloud based approach for mobile device management.
- If companies are going to outsource device management, it is to a trusted external party.
- There is a noticeable variation in preference by industry verticals.
- Utilities and Manufacturing are least likely to run on-premises and also most likely to use Cloud.
- Finance, Healthcare, Distribution and Government are least likely to use Cloud.
MDM – OS Perception

QE10. Using a scale of 1 to 5, where 1 is Very poor and 5 is Excellent, please rate the following operating systems based on your perception or experience of their capabilities for governance, compliance and security:

- Apple and Android standout as leaders in perceived security.
- Much of this is due to a view that they have both improved their security posture significantly over the past year.
- BlackBerry has suffered with a poor reputation for security on their new OS platform.
- While UK, France and Germany generally feel the same about all platforms, UK has a noticeably high opinion of Android security.

N = 735 (Percentage of companies)
Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education

QE11. Using a scale of 1 to 5, where 1=Significantly worse, 3 Stayed the same, and 5=Significantly better, in your view, how have the security capabilities of each platform changed over the last 12 months?

Apple
- (Significantly) Better
- Stable
- (Significantly) Worse

Microsoft
- (Significantly) Better
- Stable
- (Significantly) Worse

Blackberry
- (Significantly) Better
- Stable
- (Significantly) Worse

Android
- (Significantly) Better
- Stable
- (Significantly) Worse

Linux
- (Significantly) Better
- Stable
- (Significantly) Worse
MDM – Software

QE8. Which device management software do you use?

- Given the preference for using the default software that comes with devices, it is no surprise to see software from device vendors dominates today.
- Centralized tools vendors that cover all or most devices in use make up a small part of the market - but these should increase in importance in the coming years given the stated intention to invest more in this area.

<table>
<thead>
<tr>
<th>Software</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPLE</td>
<td>39.6%</td>
</tr>
<tr>
<td>DELL</td>
<td>27.5%</td>
</tr>
<tr>
<td>MICROSOFT</td>
<td>22.8%</td>
</tr>
<tr>
<td>SAMSUNG</td>
<td>18.5%</td>
</tr>
<tr>
<td>HP</td>
<td>16.5%</td>
</tr>
<tr>
<td>BLACKBERRY</td>
<td>8.5%</td>
</tr>
<tr>
<td>GOOD TECHNOLOGY</td>
<td>6.1%</td>
</tr>
<tr>
<td>SYMANTEC</td>
<td>5.1%</td>
</tr>
<tr>
<td>MOBILEIRON</td>
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</tr>
<tr>
<td>PANASONIC</td>
<td>3.9%</td>
</tr>
<tr>
<td>AIRWATCH</td>
<td>3.5%</td>
</tr>
<tr>
<td>OTHERS</td>
<td>8.0%</td>
</tr>
<tr>
<td>NONE</td>
<td>11.6%</td>
</tr>
</tbody>
</table>

N = 735
(Percentage of companies)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
QE12. Which of the following is your preferred method to access Enterprise Applications on Tablets?

- Browser-based
- Cloud
- Use and RDP or RCA to an external Windows environment device
- Native application on tablet device

Given the move towards browser based interfaces for web or Cloud based applications in the PC world, it is clear that there is a preference for this approach for Enterprise Apps on Tablets too.

Native Enterprise Apps for Tablets remains a sizeable minority preference, given the difficulties of cross-platform App development. This may change if a business standardises on one platform.

A VDI/remote desktop approach to App access remains the least preferred approach.

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education.
Security Features

QD9 Which security features and policies will be implemented on your Tablets and/or Hybrids?

- CONTINUOUSLY REFRESHED SECURITY POLICIES: 50.4%
- EMAIL SESSION ENCRYPTION: 42.0%
- BIOMETRICS: 41.4%
- ENCRYPTION CAPABILITIES: 39.8%
- SEPARATELY MANAGED PERSONAL AND CORPORATE DATA: 39.5%
- SECURITY SPECIFIC MODULES: 32.1%
- NONE OF THE ABOVE: 3.1%
- DON'T KNOW: 3.8%

N = 596
(Percentage of responses)
Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

- When it comes to security features, having up to date policies applied to the device is seen as the most important feature. Given the lack of investment in specialized tools, this is likely to be a big challenge to accomplish.
- Enhanced authentication is rising in importance, with Biometrics now seen as a way to accomplish this.
- Encryption is one of the top concerns. Given its importance for mitigating data loss notification requirements, it should have more focus.
QE1 Where do you typically purchase your PCs, Tablets and Smartphones?

- PCs are bought almost entirely independently of the mobile phone operators or mobile phone retailers and resellers.
- Tablets are preferably bought in a similar manner to Smartphones currently – with a lot of influence from the mobile phone channels.
- As Tablets gain more traction in business and applications become more widely adopted, this will put pressure on the mobile phone channels to adopt PC solutions type capabilities, and increase the importance of the PC channels for Tablets.

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals.
Survey Findings
A. Current Client Device Equipment
Tablet Equipment

QS1 Do you use tablets in your company?

* Tablets include Tablet Slates and Hybrid devices

N = 1218
(Percentage of responses)
Aggregate data for all company sizes (10 – 500+) and all verticals

Around 2/3 of total companies interviewed have tablets

<table>
<thead>
<tr>
<th>Region</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>65.1%</td>
<td>34.9%</td>
</tr>
<tr>
<td>France</td>
<td>68.3%</td>
<td>31.7%</td>
</tr>
<tr>
<td>UK</td>
<td>67.9%</td>
<td>32.1%</td>
</tr>
<tr>
<td>Germany</td>
<td>59.2%</td>
<td>40.8%</td>
</tr>
</tbody>
</table>

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Commercial Tablet Penetration

QA1 How many of the following computing devices, purchased by your company, do you have in total in your company?

### Total sample penetration

- Desktop PC: 60.6%
- Portable PC***: 18.0%
- SmartPhones: 9.8%
- Handheld: 4.6%
- Tablets*: 6.3%
- POS**: 0.7%

### By Country

- France: 6.3%
- UK: 6.2%
- Germany: 6.3%

N = 1218
(Percentage of total devices in the sample – outliers adjusted, weighted)
Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

*Tablets include Tablet Slates and Hybrid devices
** POS for Distribution/Hospitality only
*** Portable PCs include Netbooks
### Tablet Penetration by Vertical

**QA1 How many computing devices, purchased by your company, do you have in total in your company?**

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Desktop PC</th>
<th>Portable PC</th>
<th>Tablets*</th>
<th>Handheld</th>
<th>SmartPhones</th>
<th>POS</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANUF</td>
<td>7.1%</td>
<td>7.3%</td>
<td>11.7%</td>
<td>8.7%</td>
<td>5.3%</td>
<td></td>
</tr>
<tr>
<td>UTILITIES</td>
<td>7.6%</td>
<td>4.6%</td>
<td>5.7%</td>
<td>4.6%</td>
<td>6.7%</td>
<td></td>
</tr>
<tr>
<td>TRANSPORT</td>
<td>8.7%</td>
<td>5.7%</td>
<td>4.6%</td>
<td>6.7%</td>
<td>7.6%</td>
<td></td>
</tr>
<tr>
<td>DISTRIB</td>
<td>5.3%</td>
<td>6.7%</td>
<td>4.6%</td>
<td>7.6%</td>
<td>7.1%</td>
<td></td>
</tr>
<tr>
<td>HOSPITALITY</td>
<td>8.7%</td>
<td>5.3%</td>
<td>6.7%</td>
<td>7.6%</td>
<td>7.3%</td>
<td></td>
</tr>
<tr>
<td>FINANCE</td>
<td>5.3%</td>
<td>6.7%</td>
<td>7.6%</td>
<td>7.1%</td>
<td>7.3%</td>
<td></td>
</tr>
<tr>
<td>GOV</td>
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<td>7.3%</td>
<td>7.1%</td>
<td>7.6%</td>
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</tr>
<tr>
<td>PROF SERV</td>
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<td>7.1%</td>
<td>7.6%</td>
<td>7.3%</td>
<td></td>
</tr>
</tbody>
</table>

*Tablets include Tablet Slates and Hybrid devices*

N = 1218
(Percentage of total devices in the sample)
Aggregate data for all countries (France, UK, Germany) and company sizes (10 – 500+).
Stage of Adoption by country

QB5 What stage of Tablet adoption do you consider your organization to be at?

65% of total companies interviewed have tablets

N = 1218

Stage of Adoption

- **TOTAL**
  - Early stage - still evaluating: 37%
  - Medium stage - expect to expand: 49%
  - Advanced stage - no further expansion planned: 13%

- **France**
  - Early stage - still evaluating: 41%
  - Medium stage - expect to expand: 44%
  - Advanced stage - no further expansion planned: 15%

- **UK**
  - Early stage - still evaluating: 45%
  - Medium stage - expect to expand: 44%
  - Advanced stage - no further expansion planned: 11%

- **Germany**
  - Early stage - still evaluating: 24%
  - Medium stage - expect to expand: 62%
  - Advanced stage - no further expansion planned: 14%

Aggregate data for all company sizes (10 – 500+) and all verticals

N = 661
N(FR) = 238
N(UK) = 231
N(197) = 193
(Percentage of companies)
## Tablet Deployment – Purchase Intentions

*QB6 What are your company's plans with regards to deploying Tablets or Hybrid devices?*

### Purchase Intentions

<table>
<thead>
<tr>
<th>Country</th>
<th>We plan to purchase in the next 12 months</th>
<th>We plan to purchase in the next 24 months</th>
<th>We plan to purchase in more than two years</th>
<th>We are currently evaluating the use of Tablets</th>
<th>We have evaluated and decided not to buy</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>9.5%</td>
<td>18.4%</td>
<td>12.5%</td>
<td>18.6%</td>
<td>40.9%</td>
</tr>
<tr>
<td>France</td>
<td>8.5%</td>
<td>26.2%</td>
<td>9.9%</td>
<td>11.2%</td>
<td>44.3%</td>
</tr>
<tr>
<td>UK</td>
<td>9.3%</td>
<td>17.3%</td>
<td>14.7%</td>
<td>23.8%</td>
<td>34.9%</td>
</tr>
<tr>
<td>Germany</td>
<td>10.6%</td>
<td>13.2%</td>
<td>12.8%</td>
<td>20.3%</td>
<td>43.0%</td>
</tr>
</tbody>
</table>

35% of total companies interviewed do not have tablets

YES 65%

N = 1218

Aggregate data for all company sizes (10 – 500+) and all verticals

N = 481
N(FR) = 142
N(UK) = 150
N(GE) = 189
(Percentage of companies)
Tablet Deployment Overview

Combined - QB5 What stage of Tablet adoption do you consider your organization to be at? and QB6 What are your company's plans with regards to deploying Tablets or Hybrid devices?

- Early stage - still evaluating: 21.6%
- Medium stage - expect to expand: 28.7%
- Advanced stage - no further expansion planned: 7.6%
- We are currently evaluating the use of Tablets: 7.8%
- We have evaluated and decided not to buy: 17.2%
- We plan to purchase in the next 12 months: 4.0%
- We plan to purchase in the next 24 months: 7.8%
- We plan to purchase in more than two years: 5.3%

Total TAM = 83% and 70% short-term purchase/expansion plans

N = 1138

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Tablet Deployment by Vertical

Combined - QB5 What stage of Tablet adoption do you consider your organization to be at? and QB6 What are your company’s plans with regards to deploying Tablets or Hybrid devices?

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Early stage - still evaluating</th>
<th>Medium stage - expect to expand</th>
<th>Advanced stage - no further expansion planned</th>
<th>We plan to purchase in the next 12 months</th>
<th>We plan to purchase in the next 24 months</th>
<th>We are currently evaluating the use of Tablets</th>
<th>We have evaluated and decided not to buy</th>
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</thead>
<tbody>
<tr>
<td>MANUF</td>
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</tr>
</tbody>
</table>

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)

N = 1138

(Percentage of companies)
**Tablets by Form Factor**

*QA4 What types of tablet or hybrid device does your organization have?*

### TABLET SLATES
- Total: 75.9%

### 2-IN-1s
- Total: 18.5%

### CONVERTIBLES
- Total: 5.6%

#### By company size

- **10-99 employees**
  - TABLET SLATES: 87.8%
  - 2-IN-1s: 9.4%
  - CONVERTIBLES: 2.8%

- **100-499 employees**
  - TABLET SLATES: 87.2%
  - 2-IN-1s: 10.6%
  - CONVERTIBLES: 2.2%

- **500+ employees**
  - TABLET SLATES: 72.9%
  - 2-IN-1s: 20.6%
  - CONVERTIBLES: 6.5%

N = 737
(Percentage of devices)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Form Factors by Vertical

QA4 What types of tablet or hybrid device does your organization have?

Aggregate data for all countries (France, UK, Germany) and all company sizes (10 – 500+)

N = 715
(Percentage of devices)
QA13a. What is the screen size of your current Tablet Slates in inch?

Tablet slate

- 8.6% 15"
- 4.0% 14"
- 50.4% 13"
- 17.2% 12"
- 8.5% 11"
- 8.9% 10"

Hybrid device

- 16.9% 15"
- 9.8% 14"
- 48.4% 13"
- 24.8% 12"

N = 515
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Tablet Slates Screen size - Today

QA13a. What is the screen size of your current Tablet Slates in inch?

N = 443
(Percentage of responses)

Aggregated data for all countries (France, UK, Germany), all company sizes (10 – 500+)

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Hybrid devices Screen size - Today

QA13a. What is the screen size of your current Hybrid devices* in inch?

* Hybrid devices include 2-in-1s and Convertibles

N = 72
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)

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Current Tablet OS

QA6 Which OS are currently running on your Tablet slates and for Hybrid devices?

### Slates OS

- **Total**:
  - BLACKBERRY OS: 3%
  - WEBOS: 4%
  - WINDOWS (ALL VERSIONS): 13%
  - IOS: 54%
  - ANDROID: 56%
  - **Total**: 58%

- **France**:
  - BLACKBERRY OS: 3%
  - WEBOS: 2%
  - WINDOWS (ALL VERSIONS): 12%
  - IOS: 54%
  - ANDROID: 56%
  - **Total**: 54%

- **UK**:
  - BLACKBERRY OS: 1%
  - WEBOS: 3%
  - WINDOWS (ALL VERSIONS): 9%
  - IOS: 37%
  - ANDROID: 68%
  - **Total**: 68%

- **Germany**:
  - BLACKBERRY OS: 4%
  - WEBOS: 8%
  - WINDOWS (ALL VERSIONS): 17%
  - IOS: 47%
  - ANDROID: 61%
  - **Total**: 61%

**N = 649** (Percentage of responses)

### Hybrids OS

- **Total**:
  - BLACKBERRY OS: 41%
  - WEBOS: 41%
  - WINDOWS (ALL VERSIONS): 71%
  - ANDROID: 70%

- **France**:
  - BLACKBERRY OS: 41%
  - WEBOS: 41%
  - WINDOWS (ALL VERSIONS): 71%

- **UK**:
  - BLACKBERRY OS: 51%
  - WEBOS: 51%
  - WINDOWS (ALL VERSIONS): 63%

- **Germany**:
  - BLACKBERRY OS: 34%
  - WEBOS: 34%
  - WINDOWS (ALL VERSIONS): 76%

**N = 235** (Percentage of responses)

Aggregate data for all company sizes (10 – 500+) and all verticals

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Tablet Penetration Evolution

QC4 How much do you think Tablets or Hybrids will represent in terms of percentage of your total devices in use within your organization next year in 2015, and in 3 years time (e.g. 2018)?

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education

N = 649
**Tablet Penetration Evolution by Vertical**

**QC4** How much do you think Tablets or Hybrids will represent in terms of percentage of your total devices in use within your organization next year in 2015, and in 3 years time (e.g. 2018)?

- **Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education**
Tablet Penetration Evolution by country

QC4 How much do you think Tablets or Hybrids will represent in terms of percentage of your total devices in use within your organization next year in 2015, and in 3 years time (eg. 2018)?

N = 649

Aggregate data for all company sizes (10 – 500+) – excluding Education
Tablets Today – Only or Additional device

QA12a What type of product do they have?
QA14a/b Are tablets/hybrids the only device or do they use them in addition to another device?

### Tablet Slates

- **France**: Only 47.5% (52.5% Additional)
- **UK**: Only 60.1% (39.9% Additional)
- **Germany**: Only 64.9% (35.1% Additional)

### Hybrid devices

- **France**: Additional 33.2% (66.8% Only)
- **UK**: Additional 50.3% (49.7% Only)
- **Germany**: Additional 59.5% (40.5% Only)

*N = 665 (Percentage of responses)*

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education.

*Hybrid devices include 2-in-1s and Convertibles*
Intended purchases – Slates: Only or Additional?

QC6a What type of product would you consider providing them with?
QC8a/b. Would tablets/hybrids be your users’ only device or would this be used in addition to another device?

Tablet Slates

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Additional</th>
<th>Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>55.6%</td>
<td>44.4%</td>
<td></td>
</tr>
</tbody>
</table>

By country

<table>
<thead>
<tr>
<th>Country</th>
<th>Additional</th>
<th>Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>50.7%</td>
<td>49.3%</td>
</tr>
<tr>
<td>UK</td>
<td>59.9%</td>
<td>40.1%</td>
</tr>
<tr>
<td>Germany</td>
<td>56.5%</td>
<td>43.5%</td>
</tr>
</tbody>
</table>

N = 767
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education.
Intended purchases – Hybrids: Only or Additional?

QC6a What type of product would you consider providing them with?
QC8a/b. Would tablets/hybrids be your users’ only device or would this be used in addition to another device?

<table>
<thead>
<tr>
<th></th>
<th>2-in-1s</th>
<th>Convertible</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2in1s</td>
<td>43.1%</td>
<td>56.9%</td>
</tr>
<tr>
<td>Convertible</td>
<td>21.0%</td>
<td>79.0%</td>
</tr>
<tr>
<td><strong>UK</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2in1s</td>
<td>38.7%</td>
<td>61.3%</td>
</tr>
<tr>
<td>Convertible</td>
<td>37.2%</td>
<td>62.8%</td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2in1s</td>
<td>60.7%</td>
<td>39.3%</td>
</tr>
<tr>
<td>Convertible</td>
<td>66.7%</td>
<td>33.3%</td>
</tr>
</tbody>
</table>

N = 767
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education.
Tables as Only device by verticals

QA14 Are tablets* the only device?

* Tablets include Tablet Slates and Hybrid devices

 Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education

N = 665
(Percentage of responses)
### Tablet User Groups - Current

**QA11 Who are Top 3 users of the Tablets purchased by your company?**

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>19.8%</td>
</tr>
<tr>
<td>Sales</td>
<td>13.7%</td>
</tr>
<tr>
<td>Marketing</td>
<td>13.1%</td>
</tr>
<tr>
<td>Production, Maintenance</td>
<td>9.2%</td>
</tr>
<tr>
<td>R&amp;D</td>
<td>3.1%</td>
</tr>
<tr>
<td>Operation</td>
<td>8.5%</td>
</tr>
<tr>
<td>Transport, delivery</td>
<td>2.1%</td>
</tr>
<tr>
<td>Customer facing</td>
<td>4.1%</td>
</tr>
<tr>
<td>White collars</td>
<td>20.3%</td>
</tr>
<tr>
<td>Teachers/Pupils</td>
<td>2.5%</td>
</tr>
<tr>
<td>Clients, Visitors</td>
<td>3.1%</td>
</tr>
<tr>
<td>Others</td>
<td>0.5%</td>
</tr>
</tbody>
</table>

*N = 737
(Percentage of responses)*

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

- *White Collars include analysts, consultants, doctors, legal, journalists etc.*
- *Transport include drivers, delivery personnel, etc.*
- *Customer Facing include shop floor staff, waiters, airport personnel etc.*

62.8% in LoBs outside Sales
Tablet User – Current and Intended purchases

QA11 Who are Top 3 users of the Tablets purchased by your company?
QC5. For which users do you consider purchasing tablets for?

Current

Intended purchases

- Executives: 18.5%
- Sales: 13.8%
- Marketing: 14.4%
- Production, Maintenance: 9.7%
- R&D: 3.5%
- Operation: 9.0%
- Transport, delivery: 2.3%
- Customer facing: 4.6%
- White collars: 19.4%
- Teachers/Pupils: 1.5%
- Clients, Visitors: 2.8%
- Others: 0.4%

64.5% in LoBs outside Sales

N(A11) = 737
N(C5) = 800
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

- White Collars include analysts, consultants, doctors, legal, journalists etc.
- Transport include drivers, delivery personnel, etc.
- Customer Facing include shop floor staff, waiters, airport personnel etc.
Tablet User Groups by country

QA11 Who are Top 3 users of the Tablets purchased by your company?
QC5. For which users do you consider purchasing tablets for?

- Executives
- Sales
- Marketing
- Production, Maintenance
- R&D
- Operation
- Transport, delivery
- Customer facing
- White collars
- Teachers/Pupils
- Clients, Visitors
- Others

N(A11) = 737
N(C5) = 800
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excl. Education

- White Collars include analysts, consultants, doctors, legal, journalists etc.
- Transport include drivers, delivery personnel, etc.
- Customer Facing include shop floor staff, waiters, airport personnel etc.
Tablet User Groups – Current by vertical

QA11 Who are Top 3 users of the Tablets purchased by your company?

• White Collars include analysts, consultants, doctors, legal, journalists etc.
• Transport include drivers, delivery personnel, etc.
• Customer Facing include shop floor staff, waiters, airport personnel etc.

N = 737
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excl. Education
Tablet User Groups – Intended by vertical

QC5. For which users do you consider purchasing tablets for?

N = 800
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excl. Education

- White Collars include analysts, consultants, doctors, legal, journalists etc.
- Transport include drivers, delivery personnel, etc.
- Customer Facing include shop floor staff, waiters, airport personnel etc.
Tablet Users – Slates vs Hybrids

Combines QA11. Who are Top 3 users of the Tablets purchased by your company? and QA12a. What type of product do they have?

Current Users

- Executives
- Sales, commercial
- Marketing
- Production
- Maintenance
- R&D
- Operation
- Transport, delivery
- White collars
- Customer facing
- Clients, Visitors

Tablet slate

Hybrids

Intended Users

- Executives
- Sales, commercial
- Marketing
- Production
- Maintenance
- R&D
- Operation
- Transport, delivery
- White collars
- Customer facing
- Clients, Visitors

Tablet slate

2-in1

Convertible

N = 718
(Percentage of responses)

N = 806
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excl. Education

- White Collars include analysts, consultants, doctors, legal, journalists etc.
- Transport include drivers, delivery personnel, etc.
- Customer Facing include shop floor staff, waiters, airport personnel etc.
**Intended Tablet Users and Screen size choice**

*Combined QC5. For which users do you consider purchasing tablets for? And QC7a. - What screen size would you envisage providing them with?*

![Bar charts showing screen size preferences by user category.](image)

- **Tablet Slates**
  - Executives
  - Sales
  - Marketing
  - Customer facing
  - Production
  - Operation
  - Maintenance
  - R&D
  - Transport
  - Clients / Visitors
  - White collars

- **Hybrid devices**
  - Executives
  - Sales
  - Marketing
  - Customer facing
  - Production
  - Operation
  - R&D
  - Transport
  - Clients / Visitors
  - White collars

**N = 502**
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excl. Education

- **White Collars** include analysts, consultants, doctors, legal, journalists etc.
- **Transport** include drivers, delivery personnel, etc.
- **Customer Facing** include shop floor staff, waiters, airport personnel etc.
## User Profiles (1/4)

### Screen size

<table>
<thead>
<tr>
<th>SLATES</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>14&quot;+</td>
<td>6%</td>
</tr>
<tr>
<td>11&quot;-13&quot;</td>
<td>16%</td>
</tr>
<tr>
<td>9&quot;-10&quot;</td>
<td>57%</td>
</tr>
<tr>
<td>7&quot;-8&quot;</td>
<td>14%</td>
</tr>
<tr>
<td>5&quot;-6&quot;</td>
<td>10%</td>
</tr>
</tbody>
</table>

### % Shared device

<table>
<thead>
<tr>
<th>SLATES</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>

### Only vs Additional

- **EXECUTIVES**
  - SLATE: 72% Only, 25% Additional, 3% Replacing
  - HYBRIDS: 53% Only, 47% Additional, 1% Replacing

- **MARKETING**
  - SLATE: 75% Only, 23% Additional, 1% Replacing
  - HYBRIDS: 52% Only, 48% Additional, 1% Replacing

- **SLATE**
  - Replacing: Desktop, Portable
- **HYBRIDS**
  - Replacing: Desktop, Portable

- **Replacing**
  - Desktop, Portable

- **In addition to**
  - Desktop, Portable

- **Tablet slate**
  - 2-in1
  - Convertible

---

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## User Profiles (2/4)

### WHITE COLLARS

<table>
<thead>
<tr>
<th></th>
<th>SLATE</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablet slate</td>
<td>68%</td>
<td>29%</td>
</tr>
<tr>
<td>2-in1</td>
<td>29%</td>
<td>3%</td>
</tr>
<tr>
<td>Convertible</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

### OPERATIONS

<table>
<thead>
<tr>
<th></th>
<th>SLATE</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablet slate</td>
<td>65%</td>
<td>29%</td>
</tr>
<tr>
<td>2-in1</td>
<td>29%</td>
<td>6%</td>
</tr>
<tr>
<td>Convertible</td>
<td>6%</td>
<td></td>
</tr>
</tbody>
</table>

### Only vs Additional

- **Only**: 56% vs 44%
- **Additional**: 43% vs 57%

### Screen size

- **SLATES**
  - 14"+ : 9%
  - 11"-13" : 62%
  - 9"-10" : 17%
  - 7"-8" : 8%
  - 5"-6" : 5%

- **HYBRIDS**
  - 14"+ : 26%
  - 11"-13" : 33%
  - 9"-10" : 26%
  - 7"-8" : 15%
  - 5"-6" : 9%

### % Shared device

- **SLATES**
  - 18%
- **HYBRIDS**
  - 33%
- **OPERATIONS**
  - 20%

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79
### User Profiles (3/4)

#### PRODUCTION

<table>
<thead>
<tr>
<th></th>
<th>SLATE</th>
<th>HYBRIDS</th>
<th></th>
<th>SLATE</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablet slate</td>
<td>51%</td>
<td>47%</td>
<td>2%</td>
<td>40%</td>
<td>48%</td>
</tr>
<tr>
<td>2-in1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Convertible</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Only vs Additional

- **In addition to**:
  - Desktop
  - Portable
  - Smartphone

- **Replacing**:
  - Desktop
  - Portable

#### Screen size

<table>
<thead>
<tr>
<th></th>
<th>SLATES</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>14&quot;+</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>11&quot;-13&quot;</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>9&quot;-10&quot;</td>
<td>42%</td>
<td>44%</td>
</tr>
<tr>
<td>7&quot;-8&quot;</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>5&quot;-6&quot;</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### % Shared device

- **PRODUCTION**: 24%
- **R&D**: 20%
### User Profiles (4/4)

#### CUSTOMER FACING

<table>
<thead>
<tr>
<th></th>
<th>SLATE</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablet slate</td>
<td>65%</td>
<td>29%</td>
</tr>
<tr>
<td>2-in1</td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td>Convertible</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### CLIENT, VISITORS

<table>
<thead>
<tr>
<th></th>
<th>SLATE</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablet slate</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>2-in1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Convertible</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Only vs Additional

- **Replacing:**
  - Nothing
  - Desktop
- **Replacing:**
  - Nothing/Smartphone
  - Desktop
- **Replacing:**
  - Smartphone
  - Desktop
- **Replacing:**
  - Desktop
  - Portable

### Screen size

<table>
<thead>
<tr>
<th>Screen Size</th>
<th>SLATES</th>
<th>HYBRIDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>14&quot;+</td>
<td>23%</td>
<td>40%</td>
</tr>
<tr>
<td>11&quot;-13&quot;</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>9&quot;-10&quot;</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>7&quot;-8&quot;</td>
<td>57%</td>
<td>40%</td>
</tr>
<tr>
<td>5&quot;-6&quot;</td>
<td>57%</td>
<td>40%</td>
</tr>
</tbody>
</table>

### % Shared device

- **CUSTOMER FACING:** 59%
- **CLIENT, VISITORS:** N/A
Use Cases: Business and Enterprise Applications

QC13a/b. Which General Business and Enterprise applications would you consider using on Tablets or Hybrids for your organization?

- **STANDARD OFFICE APPLICATIONS**: 65.4%
- **COLLABORATION APPLICATIONS**: 62.5%
- **WEB BROWSING AND INFORMATION ACCESS**: 58.0%
- **CUSTOMER RELATIONSHIP MANAGEMENT**: 55.2%
- **RESOURCE PLANNING AND MANAGEMENT**: 49.0%
- **DATA AND DOCUMENT MANAGEMENT AND SHARING**: 40.8%
- **FIELD/SALES FORCE AUTOMATION**: 37.0%
- **NO ENTERPRISE APPLICATIONS**: 18.9%
- **NO GENERAL BUSINESS APPLICATIONS**: 9.5%

N = 1010
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Use Cases: Business and Enterprise Applications

QC13a/b. Which General Business and Enterprise applications would you consider using on Tablets or Hybrids for your organization?

N = 1010
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)
Use Cases: Vertical Applications

**QC13c. Which Vertical applications would you consider using on Tablets or Hybrids for your organization?**

- Database Development and Management: 24.3%
- Order Management: 9.7%
- Operations Applications: 8.3%
- Supply Chain Management: 6.7%
- Customer Service Apps (Queue Busting,...): 6.7%
- Signature: 5.4%
- Engineering Applications: 4.7%
- Special Calculators: 3.5%
- Payment Processing Apps: 3.0%
- Traffic and Navigation Apps (GIS, GPS...): 2.6%
- Voice-to-Text Transcription: 2.4%
- Diagnostic Tools (Inlc. 3D Visualization Of...): 1.4%
- Electronic Prescription Service (EPS): 1.4%
- Others: 14.9%
- No Vertical Applications: 5.1%

N = 1010
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Use Cases: Selected Vertical Applications

QC13c. Which Vertical applications would you consider using on Tablets or Hybrids for your organization?

Utilities
- Engineering Apps: 37.7%
- Data Entry/Database Management: 33.5%
- Meter Reading App: 25.3%
- Operations Applications: 24.9%
- E-Signature: 18.6%
- Certification Creation/Management: 17.1%
- Resource Management Apps: 16.5%
- Traffic and Navigation Apps: 14.8%
- Special Calculators: 11.4%
- Security/Surveillance Apps: 9.6%
- No Vertical Applications: 12.9%

N = 53 (Percentage of responses)

Distribution
- Customer Service Apps: 37.3%
- Data Entry/Database Management: 35.8%
- Supply Chain Management: 25.9%
- Order Management: 25.7%
- Payment Processing Apps: 19.4%
- E-Signature: 16.9%
- Digital Commerce Apps: 16.6%
- Workforce Management (Staff Shifts/Vacation Schedule): 6.6%
- No Vertical Applications: 13.7%

N = 100 (Percentage of responses)

Healthcare
- Data Entry/Database Management: 42.9%
- Electronic Prescription Service (EPS): 32.1%
- Diagnostic Tools: 32.0%
- Operations Applications: 28.2%
- Referral Management: 21.6%
- Patients Records Management: 20.6%
- Special Calculators: 17.4%
- Voice-to-Text Transcription: 11.8%
- No Vertical Applications: 17.7%

N = 99 (Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+), N = 252
Connectivity by country

QA7a. What percentage of those tablets or hybrids are WiFi only, and what % are 3G/4G enabled?

By Country

<table>
<thead>
<tr>
<th></th>
<th>3G/4G ENABLED</th>
<th>WiFi ONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>38.4%</td>
<td>61.7%</td>
</tr>
<tr>
<td>UK</td>
<td>33.5%</td>
<td>66.5%</td>
</tr>
<tr>
<td>Germany</td>
<td>47.6%</td>
<td>52.4%</td>
</tr>
</tbody>
</table>

N= 664
(Percentage of devices)

Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education
Connectivity by vertical – WiFi only

QA7a. What percentage of your current tablets* are WiFi only, and what % are 3G/4G enabled?

Two thirds of 3G/4G enabled Tablets in the sample are activated

* Tablets include Tablet Slates and Hybrid devices

<table>
<thead>
<tr>
<th>Vertical</th>
<th>WiFi only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>61.8%</td>
</tr>
<tr>
<td>MANUF</td>
<td>47.5%</td>
</tr>
<tr>
<td>UTILITIES</td>
<td>65.2%</td>
</tr>
<tr>
<td>TRANSPORT</td>
<td>58.9%</td>
</tr>
<tr>
<td>DISTRIBUTION</td>
<td>57.5%</td>
</tr>
<tr>
<td>HOSPITALITY</td>
<td>76.4%</td>
</tr>
<tr>
<td>FINANCE</td>
<td>58.5%</td>
</tr>
<tr>
<td>GOV</td>
<td>79.7%</td>
</tr>
<tr>
<td>HEALTH</td>
<td>94.7%</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>41.7%</td>
</tr>
<tr>
<td>PROF SERV</td>
<td></td>
</tr>
</tbody>
</table>

N = 664
(Percentage of devices)
Adoption of B/C/UYOD

QA20A Does your organization have a formal policy allowing employees to Bring, Choose or Use their own mobile device for work-related purposes?

Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education

- A Bring Your Own Device (BYOD) policy
- A Choose Your Own Device (CYOD) policy
- No official policy but employees are allowed to bring and use their own device
- We don't have any official policy and employees are not allowed to bring or use their own device

N = 1068
N(FR) = 354
N(UK) = 358
N(GE) = 357
(Percentage of responses)
B/C/UYOD for Tablets by Country

QA21a. How many tablets or hybrid devices are supported by BYOD/CYOD/UYOD in your company?

Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education

N = 81 (respondents for Tablets for B/C/UYOD)
(Percentage of devices in sample)
Approach to CYOD

QA23. - What does your company's CYOD policy entail?

Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education

- The company buys and offers a product choice to its employee
- The employee buys the device from an approved list of products
- The employee buys the product/brand he wants, but has to meet certain requirements
- The employee buys the device he wants with no brand or specs requirements

France
- The company buys and offers a product choice to its employee: 27.5%
- The employee buys the device from an approved list of products: 14.1%
- The employee buys the product/brand he wants, but has to meet certain requirements: 36.1%
- The employee buys the device he wants with no brand or specs requirements: 22.3%

UK
- The company buys and offers a product choice to its employee: 65.3%
- The employee buys the device from an approved list of products: 6.0%
- The employee buys the product/brand he wants, but has to meet certain requirements: 18.9%
- The employee buys the device he wants with no brand or specs requirements: 9.7%

Germany
- The company buys and offers a product choice to its employee: 15.3%
- The employee buys the device from an approved list of products: 29.5%
- The employee buys the product/brand he wants, but has to meet certain requirements: 24.6%
- The employee buys the device he wants with no brand or specs requirements: 30.5%

N = 191
N(FR) = 64
N(UK) = 63
N(GE) = 64
(Percentage of responses)
Future adoption of B/C/UYOD

QA30. What are your organisation’s future plans with regard to BYOD/CYOD/UYOD?

<table>
<thead>
<tr>
<th>Country</th>
<th>WE ARE UNLIKELY TO SUPPORT ANY OF THOSE POLICIES</th>
<th>WE HAVE NOT EVALUATED ANY OF THESE POLICIES</th>
<th>WE ARE EVALUATING UYOD</th>
<th>WE ARE EVALUATING A CYOD POLICY</th>
<th>WE ARE EVALUATING A BYOD POLICY</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>2%</td>
<td>71%</td>
<td>4%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>UK</td>
<td>18%</td>
<td>42%</td>
<td>8%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Germany</td>
<td>6%</td>
<td>86%</td>
<td>1%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

N = 568
N(FR) = 203
N(UK) = 182
N(GE) = 183
(Percentage of responses)
B. Device Strategy, Decision Process and Tablet Deployment
Mobile Platforms Relevance

B1 Using a scale from 1 to 5*, how relevant the following computing devices are for your organization and business needs?

N = 1218
(Total percentage of 4 and 5 ratings)

*1 is not at all relevant; 5 is extremely relevant

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals.
Mobile Platforms Relevance by Vertical

B1 Using a scale from 1 to 5*, how relevant the following computing devices are for your organization and business needs?

MANUFACTURING

UTILITIES

TRANSPORT

DISTRIBUTION

HOSPITALITY

FINANCE

GOV

HEALTH

EDU

PROF SERV

N = 1218
(Total percentage of 4 and 5 ratings)

* 1 is not at all relevant; 5 is extremely relevant

Legend:

NB w/Touch = Traditional Notebooks with Touch
Ultraslim w/Touch = Ultraslim Notebooks with Touch
Conv = Convertibles
Large SP = Large Smartphones
Tablets <10'' w/Cell = Tablets below 10” with cellular capabilities

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)
## Decision Making Process Overview

QB7. Who in your organization is responsible for or involved in Initiating the request for Tablets? Influence the deployment decision, product choice? And Making the final decision as regards to deployment and product choice?

<table>
<thead>
<tr>
<th>Role of...</th>
<th>ITDM (Company wide)</th>
<th>LoB (Business Unit level)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>IT dept.</td>
<td>C-levels</td>
</tr>
<tr>
<td>Initiating request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT dept.</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>C-levels</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>LoBs</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Influencing request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT dept.</td>
<td>59%</td>
<td></td>
</tr>
<tr>
<td>C-levels</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>LoBs</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Influencing product choice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT dept.</td>
<td>72%</td>
<td></td>
</tr>
<tr>
<td>C-levels</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>LoBs</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Final deployment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT dept.</td>
<td>69%</td>
<td></td>
</tr>
<tr>
<td>C-levels</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>LoBs</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Final product decision</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT dept.</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>C-levels</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>LoBs</td>
<td>20%</td>
<td></td>
</tr>
</tbody>
</table>

**N(ITDM) = 792**  
(Percentage of responses)

**N(LoB) = 217**  
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany); all company sizes (10 – 500+) and all verticals
Decision Making Process: Request Initiator

QB7a Who in your organization is responsible for or involved in Initiating the request for Tablets?

**ITDM**
- IT DEPARTMENT: 56.7%
- CEO: 40.6%
- CFO: 30.5%
- CUSTOMER SERVICE DEPARTMENT: 28.1%
- SALES DEPARTMENT: 28.1%
- MARKETING: 27.2%

**LOB**
- IT DEPARTMENT: 47.8%
- CEO: 38.5%
- MARKETING: 31.6%
- SALES DEPARTMENT: 29.8%
- CFO: 29.2%
- CUSTOMER SERVICE DEPARTMENT: 23.5%

N(IT) = 792 (Percentage of responses)
N(LoB) = 217 (Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals.
Decision Making Process: Influencers

**QB7b/c Who in your organization is responsible for or involved in Influencing the deployment and product decision?**

### Influencing the deployment decision

<table>
<thead>
<tr>
<th>Department</th>
<th>ITDM</th>
<th>LOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT DEPARTMENT</td>
<td>58.5%</td>
<td>53.5%</td>
</tr>
<tr>
<td>CEO</td>
<td>38.9%</td>
<td>33.6%</td>
</tr>
<tr>
<td>CFO</td>
<td>33.4%</td>
<td></td>
</tr>
<tr>
<td>SALES DEPARTMENT</td>
<td>26.2%</td>
<td>32.6%</td>
</tr>
<tr>
<td>CUSTOMER SERVICE DEPARTMENT</td>
<td>22.6%</td>
<td>27.3%</td>
</tr>
<tr>
<td>MARKETING</td>
<td>21.2%</td>
<td>23.3%</td>
</tr>
</tbody>
</table>

- N(IT) = 792
- N(LoB) = 217

### Influencing the product choice

<table>
<thead>
<tr>
<th>Department</th>
<th>ITDM</th>
<th>LOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT DEPARTMENT</td>
<td>71.7%</td>
<td>69.3%</td>
</tr>
<tr>
<td>CFO</td>
<td>35.3%</td>
<td>35.0%</td>
</tr>
<tr>
<td>CEO</td>
<td>28.3%</td>
<td></td>
</tr>
<tr>
<td>SALES DEPARTMENT</td>
<td>27.6%</td>
<td>28.9%</td>
</tr>
<tr>
<td>CUSTOMER SERVICE DEPARTMENT</td>
<td>26.0%</td>
<td>32.4%</td>
</tr>
<tr>
<td>MARKETING</td>
<td>25.2%</td>
<td>27.2%</td>
</tr>
<tr>
<td>CEO</td>
<td></td>
<td>24.9%</td>
</tr>
</tbody>
</table>

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals.
Decision Making Process: Final Decision Makers

QB7d/e Who in your organization is responsible for or involved in Making the final deployment and product decision?

Making the final deployment decision

<table>
<thead>
<tr>
<th>Department</th>
<th>ITDM</th>
<th>LOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT DEPARTMENT</td>
<td>69.3%</td>
<td>62.2%</td>
</tr>
<tr>
<td>CEO</td>
<td>39.4%</td>
<td>43.5%</td>
</tr>
<tr>
<td>CFO</td>
<td>33.6%</td>
<td>29.8%</td>
</tr>
<tr>
<td>SALES DEPARTMENT</td>
<td>21.7%</td>
<td>22.8%</td>
</tr>
<tr>
<td>MARKETING</td>
<td>20.4%</td>
<td>17.6%</td>
</tr>
<tr>
<td>CUSTOMER SERVICE DEPARTMENT</td>
<td>14.4%</td>
<td>14.1%</td>
</tr>
</tbody>
</table>

Making the final product choice

<table>
<thead>
<tr>
<th>Department</th>
<th>ITDM</th>
<th>LOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT DEPARTMENT</td>
<td>79.2%</td>
<td>77.6%</td>
</tr>
<tr>
<td>CEO</td>
<td>34.7%</td>
<td>36.5%</td>
</tr>
<tr>
<td>CFO</td>
<td>31.2%</td>
<td>26.5%</td>
</tr>
<tr>
<td>MARKETING</td>
<td>22.6%</td>
<td>22.5%</td>
</tr>
<tr>
<td>SALES DEPARTMENT</td>
<td>19.4%</td>
<td>18.7%</td>
</tr>
<tr>
<td>CUSTOMER SERVICE DEPARTMENT</td>
<td>17.3%</td>
<td>17.1%</td>
</tr>
</tbody>
</table>
Tablet Adoption: Key Motivating Factors

QB8 What do you see as key reasons or motivating factors for deploying Tablets in your organization?

- Increase Employee Productivity: 62.4%
- Improve Customer Facing Engagement: 47.8%
- Drive Innovative 'Company Image': 36.2%
- Fulfill Some Business Needs/Apps Not Fulfilled by Traditional Computing Devices: 31.5%
- Business Transformation: 28.4%

N = 943
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
Tablet Adoption: Key Motivating Factors

QB8 What do you see as key reasons or motivating factors for deploying Tablets in your organization?

N = 943
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
Tablet Adoption: Key inhibitors

QB9 What do you see as key challenges or inhibitors for deploying Tablets or Hybrids in your organization?

- **SECURITY ISSUES, DATA LOSS/ACCESS RISKS**: 52.5%
- **COMPLIANCE AND REGULATORY CHALLENGES**: 37.8%
- **INITIAL/ONGOING COST**: 34.9%
- **APPLICATION DEVELOPMENT CHALLENGES**: 34.4%
- **MOBILE DEVICE MANAGEMENT COMPLEXITY**: 31.4%
- **DOUBTS ON ADVANTAGE OF TABLETS OVER PCS (OR OTHER CURRENT DEVICES)**: 22.9%
- **LACK OF/INSUFFICIENT TOOLS TO DEMONSTRATE ROI**: 14.3%
- **OTHERS**: 2.3%

N = 1218
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Tablet Adoption: Key inhibitors

QB9 What do you see as key challenges or inhibitors for deploying Tablets or Hybrids in your organization?

- **SECURITY ISSUES, DATA LOSS/ACCESS RISKS**
- **COMPLIANCE AND REGULATORY CHALLENGES**
- **MOBILE DEVICE MANAGEMENT COMPLEXITY**
- **INITIAL/ONGOING COST**
- **APPLICATION DEVELOPMENT CHALLENGES**
- **DOUBTS ON ADVANTAGE OF TABLETS OVER PCS (OR OTHER CURRENT DEVICES)**
- **LACK OF/INSUFFICIENT TOOLS TO DEMONSTRATE ROI**

**N = 1218**
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
C. Purchase intentions, Product choice and Requirements
Purchase Intentions 2014 and 2015

QC2 How many Tablets or Hybrid devices do you plan/intend to purchase in 2014 and in 2015?

N (2014) = 1010
N (2015) = 944 (excl. Education)  
(Percentage of responses, not volumes)

Aggregate data for all company sizes (10 – 500+) and all verticals (excl. Education in 2015)
QC2 How many Tablets or Hybrid devices do you plan/intend to purchase in 2014 and in 2015?

Purchase Intentions 2014 and 2015

Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education

(Percentage of responses, not volumes)
Purchase Intentions by Form Factor

QC2 How many Tablets or Hybrid devices do you plan/intend to purchase in 2014 and in 2015?
QC2.1. And what type of product would you be most likely to purchase?

N (2014) = 644 (excl. don’t Know)
N (2015) = 547 (excl. don’t Know)
(Percentage of devices)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
QC2.1. And what type of product would you be most likely to purchase in 2014 and 2015?

Table: Purchase Intentions – Form Factor by Vertical

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Tablet Slate</th>
<th>2-in-1</th>
<th>Convertible</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANUF</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UTILITIES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRANSPORT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DISTRIB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HOSPITALITY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FINANCE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOV</td>
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<td></td>
<td></td>
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<td>HEALTH</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>EDU</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROF SERV</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

N (2014 + 2015) = 1193 (excl. don’t Know)
(Percentage of devices)
Future Purchases – OS Preference

QD1a/b. Which OS would you likely choose/adopt for your tablet slates or Hybrids?

**Slates OS**
- Android: 57.7%
- iOS: 47.1%
- Windows 7: 10.7%
- Windows 8.1 or RT: 19.3%
- Windows embedded: 18.0%
- Windows (don’t know yet which version): 5.2%

**Windows all versions**: 53.2%

**Hybrid OS**
- Android: 43.0%
- iOS: 39.5%
- Windows 7: 13.5%
- Windows 8.1 or RT: 18.1%
- Windows embedded: 21.7%
- Windows (don’t know yet which version): 8.0%
- Other: 0.4%

**Windows all versions**: 61.3%

N = 764 (Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

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Future Purchases – OS by Country

QD1a/b. Which OS would you likely choose/adopt for your tablet slates or Hybrids?

**Slates OS**

- **Android**
  - France: 59.3%
  - UK: 51.7%
  - Germany: 61.2%

- **iOS**
  - France: 52.1%
  - UK: 51.2%
  - Germany: 56.0%

- **Windows 7**
  - France: 41.8%
  - UK: 51.2%
  - Germany: 42.7%

- **Windows 8.1 or RT**
  - France: 58.3%
  - UK: 58.3%
  - Germany: 61.2%

- **Windows embedded**
  - France: 0%
  - UK: 0%
  - Germany: 0%

- **Windows (don’t know yet which version)**
  - France: 42.2%
  - UK: 29.8%
  - Germany: 46.9%

**Hybrid devices**

- **Android**
  - France: 42.2%
  - UK: 39.3%
  - Germany: 48.7%

- **iOS**
  - France: 68.3%
  - UK: 53.6%
  - Germany: 61.1%

- **Windows 7**
  - France: 41.6%
  - UK: 48.7%
  - Germany: 46.9%

- **Windows 8.1 or RT**
  - France: 29.8%
  - UK: 53.6%
  - Germany: 61.1%

- **Windows embedded**
  - France: 0%
  - UK: 0%
  - Germany: 0%

- **Windows (don’t know yet which version)**
  - France: 46.9%
  - UK: 48.7%
  - Germany: 46.9%

**Aggregate data for all company sizes (10 – 500+) and all verticals**

- N = 764 (Percentage of responses)
- N = 713 (Percentage of responses)
Future Purchases – OS by Vertical

QD1a/b. Which OS would you likely choose/adopt for your tablet slates or Hybrids?

Tablet Slates OS

Hybrid devices

N = 764
(Percentage of responses)

N = 713
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany) and all company sizes (10 – 500+)

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Reasons for OS preference – Tablets Slate

Combined QD1a/b. Which OS would you likely choose/adopt for your tablet slates? And QD2 What would be the main reasons for choosing this OS?

1. Ability to scale current OS environment
   - iOS: 60%
   - Android: 64%
   - Windows: 73%

2. Seamless integration with existing mobile/smartphone OS environment
   - iOS: 37%
   - Android: 32%
   - Windows: 57%

3. Seamless integration with existing Windows OS environment
   - iOS: 48%
   - Android: 54%
   - Windows: 57%

4. User interface / friendliness
   - iOS: 47%
   - Android: 41%
   - Windows: 55%

5. Off-the-shelf business application availability
   - iOS: 31%
   - Android: 27%
   - Windows: 37%

6. Existing relationship with current hardware vendor
   - iOS: 16%
   - Android: 25%
   - Windows: 27%

7. Application developer (API) skill set availability
   - iOS: 20%
   - Android: 20%
   - Windows: 24%

8. Experience of using already the OS
   - iOS: 14%
   - Android: 20%
   - Windows: 15%

N = 764
(Percentage of responses)
Reasons for OS preference – Hybrids

Combined QD1a/b. Which OS would you likely choose/adopt for your Hybrids? And QD2 What would be the main reasons for choosing this OS?

- Seamless integration with existing Windows OS environment: 30% iOS, 32% Android, 54% Windows
- Ability to scale current OS environment: 31% iOS, 44% Android, 52% Windows
- User interface / friendliness: 32% iOS, 31% Android, 47% Windows
- Seamless integration with existing mobile/smartphone OS environment: 21% iOS, 24% Android, 50% Windows
- Off-the-shelf business application availability: 13% iOS, 15% Android, 38% Windows
- Application developer (API) skill set availability: 11% iOS, 13% Android, 20% Windows
- Existing relationship with current hardware vendor: 11% iOS, 13% Android, 18% Windows
- Experience of using already the OS: 6% iOS, 10% Android, 11% Windows

N = 712
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
QD3. - Do you see the management of multiple OSes within your organisation as a key concern, moderate challenge or not at all a challenge?

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

N = 596
(Percentage of responses)
Screen Size – Intended Purchases

QC7a. – Regarding the Tablet Slates or Hybrid devices that you plan to provide your employees with, which screen size would you envisage for them in inches?

Tablet Slates

<table>
<thead>
<tr>
<th>Screen Size</th>
<th>Today</th>
<th>Intended Purchases</th>
</tr>
</thead>
<tbody>
<tr>
<td>16''</td>
<td>50.4%</td>
<td>17.2%</td>
</tr>
<tr>
<td>15''</td>
<td>10''</td>
<td>5.4%</td>
</tr>
<tr>
<td>14''</td>
<td>9''</td>
<td>8.3%</td>
</tr>
<tr>
<td>13''</td>
<td>10''</td>
<td>3.9%</td>
</tr>
<tr>
<td>12''</td>
<td>9''</td>
<td>12.3%</td>
</tr>
<tr>
<td>11''</td>
<td>10''</td>
<td>40.4%</td>
</tr>
<tr>
<td>10''</td>
<td>9''</td>
<td>16.3%</td>
</tr>
<tr>
<td>9''</td>
<td>8''</td>
<td>3.9%</td>
</tr>
<tr>
<td>8''</td>
<td>7''</td>
<td>16.9%</td>
</tr>
<tr>
<td>6''</td>
<td>6''</td>
<td>9.9%</td>
</tr>
<tr>
<td>5''</td>
<td>5''</td>
<td>10.1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Screen Size</th>
<th>Today</th>
<th>Intended Purchases</th>
</tr>
</thead>
<tbody>
<tr>
<td>13 to 16''</td>
<td>16.9%</td>
<td>16.5%</td>
</tr>
<tr>
<td>9'' - 10''</td>
<td>48.4%</td>
<td>26.1%</td>
</tr>
<tr>
<td>6'' - 8''</td>
<td>24.8%</td>
<td>9.9%</td>
</tr>
</tbody>
</table>

N (Today)= 515
N (Intended Purchases) = 502
(Percentage of responses, not volumes)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

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Screen Size by Vertical – Slates vs Hybrids

QC7a. – Regarding the Tablet Slates or Hybrid devices that you plan to provide your employees with, which screen size would you envisage for them in inches?

### Slates

- 16"
- 15"
- 14"
- 13"
- 12"
- 11"
- 10"
- 9"
- 8"
- 7"
- 6"
- 5"

N = 356
(Percentage of responses, not volumes)

### Hybrids devices

- 16"
- 15"
- 14"
- 13"
- 12"
- 11"
- 10"
- 9"
- 8"
- 7"
- 6"
- 5"

N = 146
(Percentage of responses, not volumes)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)
Input Method

QD4 Considering your business/organization needs, what are the most important input methods?

N = 830
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany) and all company sizes (10 – 500+)

*Onboard or Network processed
Product Features Requirements

QD5 Using a scale of 1 to 5, where 1=not at all important and 5=extremely important, please indicate which of the following features are important for your tablet or hybrid devices.

**Very or Extremely Important Features**

- **Battery Life**: 75.6%
- **Voice Capabilities**: 65.2%
- **Security Features**: 60.0%
- **Outdoor Readable Screen**: 58.0%
- **Design, Lightness/Thinness**: 53.9%
- **3G/4G Enabled**: 53.3%
- **Serial/Parallel/USB/SD Card Ports**: 52.0%

N = 830
(Sum of 4 and 5 rankings)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals.

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Product Features by Vertical

QD5 Using a scale of 1 to 5, where 1 = not at all important and 5 = extremely important, please indicate which of the following features are important for your tablet or hybrid devices

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)

N = 830
(Sum of 4 and 5 rankings)
Additional Product Features

QD7 Considering your business/organization’s needs, which of the following ADDITIONAL FEATURES are important to have on your Tablet or Hybrid devices?

- RUGGEDIZED: DROP, SHOCK, WATER RESISTANT,... 37.9%
- BARCODE SCANNER 37.3%
- SMART CARD READER 37.0%
- CREDIT CARD READER 31.3%
- FINGER PRINT READERS 29.9%
- HIGH RESOLUTION FRONT AND BACK CAMS 24.4%
- GLOVED TOUCH OPERATION 19.4%
- NFC (NEAR FIELD COMMUNICATION) 18.9%
- NOISE CANCELLATION 16.9%
- CONFIGURATION, INTEGRATED PCI SLOT... 16.4%
- VEHICLE-MOUNTED HANDLING OPTIONS 16.3%
- RFID - UHF 13.8%

N = 674
(Percentage of responses)
Additional Product Features by Vertical

QD7 Considering your business/organization's needs, which of the following ADDITIONAL FEATURES are important to have on your Tablet or Hybrid devices?

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)

N = 674
(Percentage of responses)
Security Features

QD9 Which security features and policies will be implemented on your Tablets and/or Hybrids?

- CONTINUOUSLY REFRESHED SECURITY POLICIES: 50.4%
- EMAIL SESSION ENCRYPTION: 42.0%
- BIOMETRICS: 41.4%
- ENCRYPTION CAPABILITIES: 39.8%
- SEPARATELY MANAGED PERSONAL AND CORPORATE DATA: 39.5%
- SECURITY SPECIFIC MODULES: 32.1%
- NONE OF THE ABOVE: 3.1%
- DON'T KNOW: 3.8%

N = 596
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Security Features by Country

QD9 Which security features and policies will be implemented on your Tablets and/or Hybrids?

**France**
- Separately Managed Personal / Corporate Data: 51.4%
- Continuously Refreshed Security Policies: 50.2%
- Email Session Encryption: 48.3%
- Encryption Capabilities: 46.9%
- Biometrics: 46.0%
- Security Specific Modules: 27.8%

**UK**
- Separately Managed Personal / Corporate Data: 35.9%
- Continuously Refreshed Security Policies: 59.1%
- Email Session Encryption: 49.5%
- Encryption Capabilities: 48.5%
- Biometrics: 38.5%
- Security Specific Modules: 34.2%

**Germany**
- Continuously Refreshed Security Policies: 43.1%
- Biometrics: 39.9%
- Security Specific Modules: 34.0%
- Separately Managed Personal / Corporate Data: 32.5%
- Email Session Encryption: 29.9%
- Encryption Capabilities: 25.9%

N = 555
(Percentage of responses)
Aggregate data for all company sizes (10 – 500+) and all verticals
Security Features by Vertical

QD9 Which security features and policies will be implemented on your Tablets and/or Hybrids?

N = 596
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)

- ENCRYPTION CAPABILITIES
- CONTINUOUSLY REFRESHED SECURITY POLICIES
- EMAIL SESSION ENCRYPTION
- BIOMETRICS
- SEPARATELY MANAGED PERSONAL / CORPORATE DATA
- SECURITY SPECIFIC MODULES
- NONE OF THE ABOVE
- DON'T KNOW
D8. Considering your business’ needs, which of the accessories are important to have on your Tablet or hybrid devices?

- JACKET SLEEVE/TABLET CASE: 46.8%
- DOCKING STATION: 45.8%
- STAND CASE: 42.3%
- SCREEN PROTECTOR: 39.5%
- CAR CHARGER: 36.1%
- ADDITIONAL BATTERY: 35.1%
- DISPLAY/VGA ADAPTOR OR OTHER ADAPTORS: 31.3%
- HEADSET: 27.5%
- WIRELESS MOUSE: 24.9%

N = 830
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
### Accessories by Vertical

**D8. Considering your business’ needs, which of the accessories are important to have on your Tablet or hybrid devices?**

<table>
<thead>
<tr>
<th>Accessory</th>
<th>MANUF</th>
<th>UTILITIES</th>
<th>TRANSPORT</th>
<th>DISTRIB</th>
<th>HOSPITALITY</th>
<th>FINANCE</th>
<th>GOV</th>
<th>HEALTH</th>
<th>EDU</th>
<th>PROF SERV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wireless Mouse</td>
<td>5%</td>
<td>3%</td>
<td>6%</td>
<td>6%</td>
<td>10%</td>
<td>6%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Headset</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
<td>8%</td>
<td>7%</td>
<td>0%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Car Charger</td>
<td>12%</td>
<td>17%</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
<td>10%</td>
<td>14%</td>
<td>11%</td>
<td>12%</td>
<td>0%</td>
</tr>
<tr>
<td>Adaptors</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>8%</td>
<td>10%</td>
<td>13%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Screen Protector</td>
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<td>12%</td>
<td>12%</td>
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<td>12%</td>
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<td>17%</td>
<td>14%</td>
<td>10%</td>
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<tr>
<td>Additional Battery</td>
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<td>12%</td>
<td>9%</td>
<td>13%</td>
<td>12%</td>
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<td>0%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Stand Case</td>
<td>13%</td>
<td>16%</td>
<td>13%</td>
<td>13%</td>
<td>17%</td>
<td>11%</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Jacket Sleeve/Case</td>
<td>14%</td>
<td>16%</td>
<td>15%</td>
<td>12%</td>
<td>13%</td>
<td>15%</td>
<td>15%</td>
<td>24%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Docking Station</td>
<td>14%</td>
<td>15%</td>
<td>17%</td>
<td>18%</td>
<td>15%</td>
<td>12%</td>
<td>15%</td>
<td>11%</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**N = 830**  
(Percentage of responses)
Pricing

QD10. How much would you be prepared to pay for a Tablet Slate. And how much for a Hybrid device?

Slates

<table>
<thead>
<tr>
<th>Price Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than Eur 100</td>
<td>10%</td>
</tr>
<tr>
<td>Eur 100 - 199</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 200 - 299</td>
<td>10%</td>
</tr>
<tr>
<td>Eur 300 - 399</td>
<td>20%</td>
</tr>
<tr>
<td>Eur 400 - 499</td>
<td>15%</td>
</tr>
<tr>
<td>Eur 500 - 599</td>
<td>10%</td>
</tr>
<tr>
<td>Eur 600 - 799</td>
<td>10%</td>
</tr>
<tr>
<td>Eur 800 - 999</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1000 - 1199</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1200 - 1399</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1400 - 1599</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1600 - 1799</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1800 or more</td>
<td>5%</td>
</tr>
</tbody>
</table>

Hybrids

<table>
<thead>
<tr>
<th>Price Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than Eur 100</td>
<td>10%</td>
</tr>
<tr>
<td>Eur 100 - 199</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 200 - 299</td>
<td>10%</td>
</tr>
<tr>
<td>Eur 300 - 399</td>
<td>20%</td>
</tr>
<tr>
<td>Eur 400 - 499</td>
<td>15%</td>
</tr>
<tr>
<td>Eur 500 - 599</td>
<td>10%</td>
</tr>
<tr>
<td>Eur 600 - 799</td>
<td>10%</td>
</tr>
<tr>
<td>Eur 800 - 999</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1000 - 1199</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1200 - 1399</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1400 - 1599</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1600 - 1799</td>
<td>5%</td>
</tr>
<tr>
<td>Eur 1800 or more</td>
<td>5%</td>
</tr>
</tbody>
</table>

N = 792 (Percentage of responses)

N = 798 (Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Pricing by Company Size

QD10. How much would you be prepared to pay for a Tablet Slate. And how much for a Hybrid device?

N = 792
(Percentage of responses)

N = 798
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany) and all verticals
D. Supplier Choice and Competitive Benchmark
Supplier Choice Criteria

QD15 Excluding price, what would be your main criteria when selecting a Tablet or Hybrid device brand?

- Compatibility with existing platforms: 55.5%
- Global solution provider: 49.4%
- Existing relationship: 40.8%
- Product offering covering multiple mobile platforms (portable, tablet, phone): 40.5%
- Support/services capabilities: 36.1%
- Application development capabilities: 23.8%
- Channel partner choice/quality: 10.5%

N = 830
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
Supplier Benchmark

QD14. Among the following vendors how likely would you be, on a scale from 1 to 5 (1 not at all likely, 5 extremely likely) to purchase tablets from them and choose as your main Tablet or 2-in-1 device supplier?

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Likelihood</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPLE</td>
<td>58.3%</td>
</tr>
<tr>
<td>SAMSUNG</td>
<td>45.4%</td>
</tr>
<tr>
<td>DELL</td>
<td>40.4%</td>
</tr>
<tr>
<td>HP</td>
<td>38.8%</td>
</tr>
<tr>
<td>ACER</td>
<td>32.7%</td>
</tr>
<tr>
<td>SONY</td>
<td>29.6%</td>
</tr>
<tr>
<td>MICROSOFT</td>
<td>26.8%</td>
</tr>
<tr>
<td>LENOVO</td>
<td>26.3%</td>
</tr>
<tr>
<td>ASUS</td>
<td>25.4%</td>
</tr>
<tr>
<td>TOSHIBA</td>
<td>22.0%</td>
</tr>
<tr>
<td>GOOGLE</td>
<td>19.6%</td>
</tr>
<tr>
<td>FUJITSU</td>
<td>19.2%</td>
</tr>
<tr>
<td>PANASONIC</td>
<td>19.1%</td>
</tr>
<tr>
<td>AMAZON</td>
<td>17.6%</td>
</tr>
</tbody>
</table>

N = 830
(Sum of 4 and 5 ratings = Very/Extremely Likely to purchase)
### Supplier Benchmark by Country

**QD14.** Among the following vendors how likely would you be, on a scale from 1 to 5 (1 not at all likely, 5 extremely likely) to purchase tablets from them and choose as your main Tablet or 2-in-1 device supplier?

<table>
<thead>
<tr>
<th>France</th>
<th>UK</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>APPLE</strong></td>
<td><strong>APPLE</strong></td>
<td><strong>APPLE</strong></td>
</tr>
<tr>
<td><strong>SAMSUNG</strong></td>
<td><strong>DELL</strong></td>
<td><strong>SAMSUNG</strong></td>
</tr>
<tr>
<td><strong>DELL</strong></td>
<td><strong>SAMSUNG</strong></td>
<td><strong>HP</strong></td>
</tr>
<tr>
<td><strong>HP</strong></td>
<td><strong>HP</strong></td>
<td><strong>DELL</strong></td>
</tr>
<tr>
<td><strong>MICROSOFT</strong></td>
<td><strong>ACER</strong></td>
<td><strong>ACER</strong></td>
</tr>
<tr>
<td><strong>SONY</strong></td>
<td><strong>SONY</strong></td>
<td><strong>ASUS</strong></td>
</tr>
<tr>
<td><strong>ACER</strong></td>
<td><strong>MICROSOFT</strong></td>
<td><strong>SONY</strong></td>
</tr>
<tr>
<td><strong>LENOVO</strong></td>
<td><strong>LENOVO</strong></td>
<td><strong>LENOVO</strong></td>
</tr>
<tr>
<td><strong>ASUS</strong></td>
<td><strong>ASUS</strong></td>
<td><strong>MICROSOFT</strong></td>
</tr>
<tr>
<td><strong>TOSHIBA</strong></td>
<td><strong>GOOGLE</strong></td>
<td><strong>FUJITSU</strong></td>
</tr>
<tr>
<td><strong>GOOGLE</strong></td>
<td><strong>FUJITSU</strong></td>
<td><strong>TOSHIBA</strong></td>
</tr>
<tr>
<td><strong>PANASONIC</strong></td>
<td><strong>PANASONIC</strong></td>
<td><strong>PANASONIC</strong></td>
</tr>
<tr>
<td><strong>AMAZON</strong></td>
<td><strong>AMAZON</strong></td>
<td><strong>AMAZON</strong></td>
</tr>
<tr>
<td><strong>FUJITSU</strong></td>
<td><strong>TOSHIBA</strong></td>
<td><strong>GOOGLE</strong></td>
</tr>
</tbody>
</table>

**N = 830**
(Sum of 4 and 5 ratings = Very/Extremely Likely to purchase)

Aggregate data for all company sizes (10 – 500+) and all verticals

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Supplier Choice vs. Portable Brand

Combined QA2b. What Portable PC brands does your organization currently have? And D14. Among the following vendors how likely would you be, on a scale from 1 to 5 (1 not at all likely, 5 extremely likely) to purchase tablets from them and choose as your main Tablet or 2-in-1 device supplier?

N(D14) = 830 (Sum of 4 and 5 ratings = Very/Extremely Likely to purchase)
Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals
E. Security, Application and Mobile Device Management
QE1 Where do you typically purchase your PCs, Tablets and Smartphones?

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals

- From an eTailer
- From a retailer
- From a Business consultancy as part of a solution
- From a Systems Integrator (SI) or Independent Software Vendor (ISV) part of a solution
- From a small/local IT reseller
- From an IT corporate reseller
- From a mobile phone retailer/reseller
- From a mobile operator or affiliated stores
- Directly from manufacturer

N(PCS) = 1005
N(Tablets) = 734
N(Smartphone) = 738
(Percentage of responses, not volumes)
Applications Development by Country

QE2 For the applications currently running on your Tablets and/or Hybrids, where were they developed?

Aggregate data for all company sizes (10 – 500+) and all verticals

N = 734
(Percentage of responses)
Applications Development by Vertical

QE2 For the applications currently running on your Tablets and/or Hybrids, where were they developed?

- DEVELOPED IN-HOUSE
- DEVELOPED BY EXTERNAL OR OUTSOURCED PARTNERS
- COMMERCIAL OFF THE SHELF APPLICATIONS
- DON’T KNOW

N = 734
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+).
Applications Management by Country

QE3 Where can employees download applications for Tablets and/or Hybrids from in your organization?

N = 565
(Percentage of responses)

Aggregate data for all company sizes (10 – 500+) and all verticals
Applications Management by Vertical

**QE3 Where can employees download applications for Tablets and/or Hybrids from in your organization?**

<table>
<thead>
<tr>
<th>Vertical</th>
<th>ENTERPRISE APP STORE</th>
<th>DEVICE VENDOR APP STORE</th>
<th>OPERATING SYSTEM VENDOR APP STORE</th>
<th>OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANUF</td>
<td>50%</td>
<td>40%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>UTILITIES</td>
<td>55%</td>
<td>35%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>TRANSPORT</td>
<td>60%</td>
<td>30%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>DISTRIBUT</td>
<td>65%</td>
<td>30%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>HOSPITALITY</td>
<td>70%</td>
<td>25%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>FINANCE</td>
<td>75%</td>
<td>20%</td>
<td>5%</td>
<td>5%</td>
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<tr>
<td>GOV</td>
<td>80%</td>
<td>15%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>HEALTH</td>
<td>85%</td>
<td>10%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>90%</td>
<td>5%</td>
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<td>5%</td>
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<tr>
<td>PROFESSION</td>
<td>95%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

N = 565
(Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)
Applications Management – B/C/UYOD

QE5. - How does your company manage the installation of applications on BYOD/CYOD/UYOD Tablets?

N = 107
(Percentage of responses)

Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education

Employees may not install any applications
Employees may install most applications, but there are some exceptions
Employees may install any applications
QE6. Which of the following types of dedicated device management software have been deployed to manage your devices?

- Device Vendor Device Management Software: 46.1%
- Software Vendor Device Management Software: 40.3%
- Specialist Independent Device Management Software: 30.6%
- General IT Management Software: 28.8%
- No Device Management Software Deployed: 13.4%

N = 735 (Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
Mobile Device Management Approach

QE7 When it comes to device management across Smartphones, Tablets and PCs, which statement best describes the situation you are in today, and where would you like it to be two years time?

N = 735 (Percentage of companies)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
Mobile Device Management Approach

QE7 When it comes to device management across Smartphones, Tablets and PCs, which statement best describes the situation you are in today, and where would you like it to be two years time?

Now

- Default tools that come with the devices
- Centralized management tool that covers most devices and default tools for remaining devices
- Centralized management tool that covers most devices and specialized tools for remaining devices
- Single management tool that manages all devices

In Two Years

N = 735
(Percentage of companies)
Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education
Mobile Device Management Approach

QE7 When it comes to device management across Smartphones, Tablets and PCs, which statement best describes the situation you are in today, and where would you like it to be two years time?

NOW

IN TWO YEARS

N = 735
(Percentage of companies)
Aggregate data for all countries (France, UK, Germany) and all company sizes (10 – 500+)
Mobile Device Management Software

QE8. Which device management software do you use?

- **APPLE**: 39.6%
- **DELL**: 27.5%
- **MICROSOFT**: 22.8%
- **SAMSUNG**: 18.5%
- **HP**: 16.5%
- **BLACKBERRY**: 8.5%
- **GOOD TECHNOLOGY**: 6.1%
- **SYMANTEC**: 5.1%
- **MOBILEIRON**: 4.3%
- **PANASONIC**: 3.9%
- **AIRWATCH**: 3.5%
- **OTHERS**: 8.0%
- **NONE**: 11.6%

N = 735  
(Percentage of companies)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
Mobile Device Management Preference

QE9. How would you prefer your Multi/Mobile Device Management solution to be?

- Installed and run on-premises
- Installed on-premises and managed from reseller/integrator's operations centre as a service
- Installed and run from reseller/integrator's operations centre as a service
- Run from the Cloud

N = 735
(Percentage of companies)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+)
MDM – OS perception

QE10. Using a scale of 1 to 5, where 1 is Very poor and 5 is Excellent*, please rate the following operating systems based on your perception or experience of their capabilities for governance, compliance and security

N = 735
(Percentage of companies)

*In the chart: Very poor or Poor = Sum of 1 and 2 ratings; Fair = 3; Good or Excellent = Sum or 4 and 5 ratings

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education

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MDM – OS perception by Country

QE10. Using a scale of 1 to 5, where 1 is Very poor and 5 is Excellent, please rate the following operating systems based on your perception or experience of their capabilities for governance, compliance and security.

N = 735
(Sum of 4 and 5 ratings = Good or Very good)

Aggregate data for all company sizes (10 – 500+) and all verticals excluding Education
Mobile Device Management – Security

QE11. Using a scale of 1 to 5, where 1 = Significantly worse, 3 Stayed the same, and 5 = Significantly better, in your view, how have the security capabilities of each platform changed over the last 12 months?

<table>
<thead>
<tr>
<th>Platform</th>
<th>(Significantly) Worse</th>
<th>Stable</th>
<th>(Significantly) Better</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPLE</td>
<td>11.0%</td>
<td>27.9%</td>
<td>61.1%</td>
</tr>
<tr>
<td>MICROSOFT WINDOWS PHONE</td>
<td>21.4%</td>
<td>34.2%</td>
<td>44.5%</td>
</tr>
<tr>
<td>MICROSOFT WINDOWS 8.1 / RT</td>
<td>16.1%</td>
<td>38.7%</td>
<td>45.2%</td>
</tr>
<tr>
<td>MICROSOFT EMBEDDED 8</td>
<td>21.9%</td>
<td>36.1%</td>
<td>42.1%</td>
</tr>
<tr>
<td>BLACKBERRY</td>
<td>24.6%</td>
<td>38.0%</td>
<td>37.4%</td>
</tr>
<tr>
<td>ANDROID</td>
<td>10.8%</td>
<td>32.2%</td>
<td>57.0%</td>
</tr>
<tr>
<td>LINUX</td>
<td>24.4%</td>
<td>35.2%</td>
<td>40.4%</td>
</tr>
</tbody>
</table>

N = 755  
(Percentage of responses)

*In the chart: (Significantly) Worse = Sum of 1 and 2 ratings; Same = 3; (Significantly) Better = Sum of 4 and 5 ratings

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
Mobile Device Management – Apps Access

QE12. Which of the following is your preferred method to access Enterprise Applications on Tablets?

- Native application on tablet device: 30.9%
- Use and RDP or RCA to an external Windows environment device: 15.2%
- Cloud: 34.2%
- Browser-based: 19.6%

N = 789 (Percentage of responses)

Aggregate data for all countries (France, UK, Germany), all company sizes (10 – 500+) and all verticals excluding Education
MDM – Apps Access by company size

QE12. Which of the following is your preferred method to access Enterprise Applications on Tablets?

- Browser-based
- Cloud
- Use and RDP or RCA to an external Windows environment device
- Native application on tablet device

N = 789 (Percentage of responses)

Aggregate data for all countries (France, UK, Germany) and all verticals excluding Education
Key Findings by Vertical
The Manufacturing sector in Europe presents a mixed picture in terms of tablet deployment with similar proportions of respondents being in early stage as in post evaluation and not buying.

- Tablet penetration on average at 7% across the 3 countries, with a strong share of 2-in-1 and convertible in particular in Germany
- Users are mainly in production and maintenance as well as operation
- Tablet used as additional device.
- Manufacturing is one sector looking for devices with 6 in. screen size for slates and hybrid and hybrids larger than 15 in.

Product feature requirements include Integrated PCI Slot and docking stations as accessory. Biometrics and containerization considered for security.
The Utilities sector presents a different picture depending on country. Tablet penetration more advanced in France and Germany with a large share of 2-in-1s.

- The primary user groups are sales and marketing as well as R&D departments. Field agents are also among users but seem to continue using predominantly dedicated handheld devices.

- Primary driver for tablet adoption is business needs not fulfilled by other devices.

- The need for 3G/4G enabled devices is also strong.

- Ruggedized devices and screen protectors are priority features, car charger an important accessory, while extended warranty and service also ranks among requirements.
Transport & Storage

- Tablet penetration is and will remain the highest in the Transport sector representing near 12% of devices – and higher in the UK – driven by the need for effective mobile platforms with continued deployments plans over the next 2 years.
- The interest is strong for slates, 2-in-1s and large smart phones.
- While Android is the dominant OS for slates, Windows leads for 2-in-1s, with an increasing demand for larger screen sizes on hybrids in the future.
- Understandably, the need for 3G/4G connectivity is high. Ports to connect to external devices is also an important feature.
- Barcode scanners are additional features considered as key.
- In terms of security, E-mail encryption is a very clear sector need.
Distribution (Retail/Wholesale)

- Distribution is relatively advanced in the adoption of tablets with several companies in mid-stage adoption and continuing over time as the sector transforms.
- Current equipment includes a large share of Slates, identified as the most relevant platform along with large smart phones, but 2-in-1s have also a large share in Germany while Convertibles are used in France.
- The variety of users from sales, logistic/warehouse functions to shop floor assistants explain the fragmented product mix.
- Future intentions feature slates with larger screen size (+15 in.), Barcode scanner is logically one of the most important feature. Ports to connect external devices and docking station also important.
- Customer Service apps key

Note: For a more detailed analysis of the Distribution sector, please refer to the Retail and Hospitality add-on Module if you subscribed to this option
Hospitality is still at an early stage of adoption with a high portion of companies currently in evaluation, but one of the most promising sector in terms of tablet growth.

- Tablets are a key IT equipment for all employees facing customers – sales or customer service functions in hotels or restaurants.
- Hybrids represent today over 1/3 of tablets and will dominate purchase intentions over 2014-15.
- The preferred screen size in this sector is 7 in. today.
- Credit card reader is unsurprisingly the most needed product feature and docking station the most important accessory.
- The sector prefers off-the-shelf applications.
- Biometrics is considered as the first feature for security implementation.

Note: For a more detailed analysis of the Hospitality sector, please refer to the Retail and Hospitality add-on Module if you subscribed to this option.
The finance/insurance sector is well advanced on tablet adoption with many already equipped and others continuing to deploy.

- Business transformation key driver
- Purchase intentions include large deployment plans of over 1,000 units – with 2-in-1s accounting for a 1/3 of planned purchases and overall share of Hybrid above 40%.
- Primary users are naturally white collars – advisors, analysts etc.
- More than 40% of the devices are 3/4 G enabled.
- This sector has unique security needs, the two most likely to be implemented being encryption and specific security modules.
- NFC is a product feature important in this area.
- Extended warranty/service is high on the purchasing list too.
Government represents a large opportunity across all countries. If current tablet penetration is low, the sector is expected to grow the fastest from a very low level.

- Purchase plans for 2015 outlines the willingness of governments to invest in new technologies – for both slates and 2-in-1s
- OS choices seem to go strongly for Windows on hybrid devices and Android on slates.
- The largest user group is executives with the portion of white collars and administrative staff to increase in the near future.
- Preferences in terms of screen size are clearly established: 11 inches for hybrid and 8 inch for slates.
- WiFi is predominant
- Ruggedized devices also considered by government. Warranty and service are also recognized features
Healthcare

Healthcare represents a major opportunity as the sector goes through important IT equipment transitions and tablet penetration is expected to grow significantly supported by strong plans for expansion in the next 2 years.

- All form factors including both slates and hybrids are relevant addressing the diverse needs of several user groups – medical, admin or operation staff.
- Strong preference for Windows as OS on both slates and hybrids.
- Battery life is key understandably.
- Key apps to be ported: electronic prescription, diagnostic tools.
- Barcode scanners and smart card readers are most needed features.
- Encryption capabilities and e-mail encryption are the preferred security approach.
ICT equipment of the Education sector is a priority for all Governments and tablets are part of the plans – but clearly different stages across Europe.

The UK remains the most advanced with 2/3 schools already have Tablets. Earlier stage in France and Germany but catching up with stronger plans to acquire within the next 2 years.

Platform wise, preference for Slates and importance of Touch in the UK – while importance of keyboard in France and Germany support hybrids. – Chromebook mostly considered as option in France.

Teaching versatility and pupil/student engagement are key drivers – Content development and insufficient infrastructure remain largest inhibitors.

Battery life and robustness among priorities – screen size between 8-12”

Deployments often part of larger ICT programs, but role of head of school

Note: For a more detailed analysis of the Education sector, please refer to the Education add-on Module if you subscribed to this option.
Professional services represent a key growth opportunity. Although the sector is very heterogeneous, a large number of businesses are already equipped and represent a key replacement market, other services are continuing to equip.

- Slates and 2-in-1 after notebooks are the most relevant platforms, and mostly as companion devices.
- Due to the mobile nature of several activities (legal, media, consultants etc.), 3/4G enabled are expected in larger proportion across the sector.
- iOS is the preferred OS with an important legacy of Apple
- The sector seems to have 5 in. screen size slate needs. NFC and high resolution camera are important product features
- Continuous security refresh as preferred security policy.

### Tablet Deployment Status

- Early stage - still evaluating, 36.2%
- Medium stage - expect to expand, 30.9%
- Advanced stage - no further expansion planned, 14.5%
- Medium stage - expect to expand, 30.9%
- Early stage - still evaluating, 36.2%
- We are currently evaluating the use of Tablets, 2.0%
- We plan to purchase in more than two years, 0.8%
- We plan to purchase in the next 24 months, 3.4%
- We plan to purchase in the next 12 months, 1.5%

### Mobile Platform Relevance

- TRADITIONAL NOTEBOOK WITH TOUCH
- LARGE SMARTPHONES
- CHROMEBOOK
- TABLET SLATE
- TABLETS <10INCH WITH CELLULAR CAPABILITIES
- ULTRASLIM LAPTOP WITH TOUCH
- 2-IN-1 TABLET
- CONVERTIBLE

**N= 109**

Sum of 4 and 5 ratings
Note:
Leveraging from the analysis of the survey results on Tablet penetration and Intended Purchases for 2014-2015 of the 1,200 companies interviewed, and from additional information collected and analysed by IDC part of its ongoing research into the Tablet market, this section presents a sizing by Vertical sector of the Tablet and Hybrid market in the three largest countries in Europe – France, Germany and the UK – The commercial segment analysed in this study includes all companies with 10+ employees and exclude businesses or institutions with less than 10 employees.

The data presented here is Confidential and for Strict Internal Use Only and will not be used in full or partially in any external communication without express written confirmation from IDC and the authors of this report.
# Commercial Tablet Market Sizing By Vertical

## Commercial Tablet and Hybrid Installed base and Shipment Forecast By Vertical Sector and Product Category – All 3 countries: France, Germany and the UK

<table>
<thead>
<tr>
<th>Country: FR-GE-UK</th>
<th>Commercial Installed Base (All 3 countries)</th>
<th>% of devices</th>
<th>% of clients</th>
<th>Tablet Unit Shipments (All 3 countries)</th>
<th>Unit Growth Y/Y</th>
<th>IB Shipments</th>
<th>% Vertical</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manufacturing</strong></td>
<td>532,613</td>
<td>6.7%</td>
<td>7.0%</td>
<td>457,023</td>
<td>9.6%</td>
<td>13.4%</td>
<td>13.2%</td>
</tr>
<tr>
<td><strong>Utilities</strong></td>
<td>65,775</td>
<td>7.0%</td>
<td>8.8%</td>
<td>54,706</td>
<td>35.6%</td>
<td>1.7%</td>
<td>2.0%</td>
</tr>
<tr>
<td><strong>Transport/Storage</strong></td>
<td>253,322</td>
<td>10.2%</td>
<td>11.6%</td>
<td>165,391</td>
<td>19.7%</td>
<td>6.4%</td>
<td>5.3%</td>
</tr>
<tr>
<td><strong>Distribution</strong></td>
<td>473,193</td>
<td>6.7%</td>
<td>8.2%</td>
<td>342,111</td>
<td>32.0%</td>
<td>11.9%</td>
<td>12.4%</td>
</tr>
<tr>
<td><strong>Hospitality</strong></td>
<td>111,059</td>
<td>5.7%</td>
<td>6.9%</td>
<td>144,118</td>
<td>50.0%</td>
<td>2.8%</td>
<td>5.5%</td>
</tr>
<tr>
<td><strong>Finance</strong></td>
<td>186,128</td>
<td>8.0%</td>
<td>8.1%</td>
<td>104,553</td>
<td>43.0%</td>
<td>4.7%</td>
<td>4.2%</td>
</tr>
<tr>
<td><strong>Government</strong></td>
<td>145,728</td>
<td>3.8%</td>
<td>3.9%</td>
<td>111,993</td>
<td>18.0%</td>
<td>3.7%</td>
<td>3.4%</td>
</tr>
<tr>
<td><strong>Healthcare</strong></td>
<td>250,833</td>
<td>7.1%</td>
<td>7.7%</td>
<td>361,739</td>
<td>22.7%</td>
<td>6.3%</td>
<td>12.3%</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td>654,445</td>
<td>7.7%</td>
<td>7.7%</td>
<td>394,677</td>
<td>30.8%</td>
<td>16.5%</td>
<td>14.7%</td>
</tr>
<tr>
<td><strong>Services</strong></td>
<td>1,305,005</td>
<td>7.6%</td>
<td>7.9%</td>
<td>668,334</td>
<td>44.5%</td>
<td>32.8%</td>
<td>26.2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,978,102</strong></td>
<td>7.1%</td>
<td>7.6%</td>
<td><strong>2,804,645</strong></td>
<td>30.1%</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

---

**Tablets include here all Tablet Slate, 2-in-1, and Convertible form factors**

**Commercial includes here all company sizes from 10 to 500+ employees – excludes 1-9 employees**

**% of devices include PC, Tablet, Hybrid, Handheld Devices, SmartPhones (and POS in distribution sector)**

**% of clients include PC, Tablet, Hybrid and Handheld Devices**

*Source: IDC EMEA, October 2014 – For Internal Use Only*
### Commercial Tablet Market Sizing By Vertical

#### Commercial Tablet and Hybrid Installed base and Shipment Forecast By Vertical Sector and Product Category – France

<table>
<thead>
<tr>
<th>Country: FRANCE</th>
<th>Commercial Installed Base</th>
<th>Tablet Unit Shipments</th>
<th>Unit Growth</th>
<th>IB Mid-2014 Shipment</th>
<th>% Vertical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>154,076</td>
<td>116,179</td>
<td>160,991</td>
<td>185,623</td>
<td>17.2%</td>
</tr>
<tr>
<td>Utilities</td>
<td>21,343</td>
<td>17,754</td>
<td>33,017</td>
<td>37,375</td>
<td>2.4%</td>
</tr>
<tr>
<td>Transport/Storage</td>
<td>113,850</td>
<td>74,229</td>
<td>115,552</td>
<td>134,965</td>
<td>12.7%</td>
</tr>
<tr>
<td>Distribution</td>
<td>107,395</td>
<td>88,929</td>
<td>190,728</td>
<td>247,565</td>
<td>12.0%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>11,131</td>
<td>28,748</td>
<td>70,229</td>
<td>79,078</td>
<td>1.2%</td>
</tr>
<tr>
<td>Finance</td>
<td>53,595</td>
<td>23,786</td>
<td>38,259</td>
<td>43,271</td>
<td>6.0%</td>
</tr>
<tr>
<td>Government</td>
<td>69,470</td>
<td>46,889</td>
<td>61,566</td>
<td>68,831</td>
<td>7.8%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>104,058</td>
<td>64,511</td>
<td>117,983</td>
<td>142,995</td>
<td>11.6%</td>
</tr>
<tr>
<td>Education</td>
<td>58,321</td>
<td>55,933</td>
<td>123,702</td>
<td>154,504</td>
<td>6.5%</td>
</tr>
<tr>
<td>Services</td>
<td>202,557</td>
<td>163,702</td>
<td>220,657</td>
<td>254,638</td>
<td>22.6%</td>
</tr>
</tbody>
</table>

| Total           | 895,795                   | 686,161               | 1,132,684   | 1,348,845             | 100.0%    |

Source: IDC EMEA, October 2014 – For Internal Use Only
### Commercial Tablet Market Sizing By Vertical

#### Germany

**Commercial Tablet and Hybrid Installed base and Shipment Forecast By Vertical Sector and Product Category**

<table>
<thead>
<tr>
<th>Country</th>
<th>Commercial Installed Base</th>
<th>% of devices</th>
<th>% of clients</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>303,973</td>
<td>7.1%</td>
<td>8.1%</td>
<td>292,085</td>
<td>298,346</td>
<td>356,225</td>
<td>411,084</td>
</tr>
<tr>
<td>Utilities</td>
<td>31,639</td>
<td>7.5%</td>
<td>9.8%</td>
<td>28,291</td>
<td>33,229</td>
<td>40,473</td>
<td>46,423</td>
</tr>
<tr>
<td>Transport/Storage</td>
<td>45,966</td>
<td>7.8%</td>
<td>9.4%</td>
<td>41,564</td>
<td>44,074</td>
<td>51,963</td>
<td>60,173</td>
</tr>
<tr>
<td>Distribution</td>
<td>168,924</td>
<td>6.8%</td>
<td>8.2%</td>
<td>102,340</td>
<td>111,144</td>
<td>134,151</td>
<td>157,359</td>
</tr>
<tr>
<td>Hospitality</td>
<td>33,048</td>
<td>6.3%</td>
<td>7.3%</td>
<td>40,470</td>
<td>51,187</td>
<td>62,141</td>
<td>73,451</td>
</tr>
<tr>
<td>Finance</td>
<td>64,323</td>
<td>7.0%</td>
<td>7.7%</td>
<td>51,844</td>
<td>68,432</td>
<td>86,566</td>
<td>101,196</td>
</tr>
<tr>
<td>Government</td>
<td>26,366</td>
<td>2.5%</td>
<td>2.7%</td>
<td>25,330</td>
<td>35,157</td>
<td>41,556</td>
<td>47,623</td>
</tr>
<tr>
<td>Healthcare</td>
<td>10,382</td>
<td>4.2%</td>
<td>4.5%</td>
<td>6,700</td>
<td>7,073</td>
<td>8,232</td>
<td>9,558</td>
</tr>
<tr>
<td>Education</td>
<td>92,346</td>
<td>6.9%</td>
<td>7.4%</td>
<td>48,216</td>
<td>58,852</td>
<td>70,211</td>
<td>82,006</td>
</tr>
<tr>
<td>Services</td>
<td>705,425</td>
<td>7.7%</td>
<td>8.7%</td>
<td>345,587</td>
<td>550,914</td>
<td>682,031</td>
<td>787,746</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,482,393</strong></td>
<td><strong>7.1%</strong></td>
<td><strong>8.0%</strong></td>
<td><strong>982,426</strong></td>
<td><strong>1,258,408</strong></td>
<td><strong>1,533,599</strong></td>
<td><strong>1,776,618</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Commercial Installed Base</th>
<th>% of devices</th>
<th>% of clients</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>217,367</td>
<td>63,150</td>
<td>23,456</td>
<td>303,973</td>
<td>171,583</td>
<td>99,080</td>
<td>21,422</td>
</tr>
<tr>
<td>Utilities</td>
<td>17,870</td>
<td>12,619</td>
<td>1,150</td>
<td>31,639</td>
<td>13,878</td>
<td>8,693</td>
<td>5,720</td>
</tr>
<tr>
<td>Transport/Storage</td>
<td>20,211</td>
<td>19,667</td>
<td>6,086</td>
<td>45,966</td>
<td>17,390</td>
<td>14,712</td>
<td>9,462</td>
</tr>
<tr>
<td>Distribution</td>
<td>94,270</td>
<td>62,274</td>
<td>12,816</td>
<td>168,924</td>
<td>55,026</td>
<td>34,507</td>
<td>12,806</td>
</tr>
<tr>
<td>Hospitality</td>
<td>20,909</td>
<td>5,762</td>
<td>6,378</td>
<td>33,048</td>
<td>20,294</td>
<td>9,783</td>
<td>10,393</td>
</tr>
<tr>
<td>Finance</td>
<td>41,548</td>
<td>14,933</td>
<td>8,382</td>
<td>64,323</td>
<td>34,436</td>
<td>13,556</td>
<td>3,851</td>
</tr>
<tr>
<td>Government</td>
<td>19,394</td>
<td>6,721</td>
<td>2,51</td>
<td>26,366</td>
<td>16,857</td>
<td>6,394</td>
<td>2,080</td>
</tr>
<tr>
<td>Healthcare</td>
<td>6,035</td>
<td>3,372</td>
<td>957</td>
<td>10,382</td>
<td>5,125</td>
<td>1,134</td>
<td>440</td>
</tr>
<tr>
<td>Education</td>
<td>86,367</td>
<td>5,055</td>
<td>92</td>
<td>92,346</td>
<td>43,350</td>
<td>4,524</td>
<td>342</td>
</tr>
<tr>
<td>Services</td>
<td>463,948</td>
<td>174,091</td>
<td>67,368</td>
<td>705,425</td>
<td>265,676</td>
<td>54,733</td>
<td>25,178</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>987,956</strong></td>
<td><strong>367,105</strong></td>
<td><strong>127,353</strong></td>
<td><strong>1,482,393</strong></td>
<td><strong>643,615</strong></td>
<td><strong>247,116</strong></td>
<td><strong>91,696</strong></td>
</tr>
</tbody>
</table>

**Commercial includes here all company sizes from 10 to 500+ employees – excludes 1-9 employees**

**% of devices include PC, Tablet, Hybrid, Handheld Devices, SmartPhones (and POS in distribution sector)**

**% of clients include PC, Tablet, Hybrid and Handheld Devices**

**Tablets include here all Tablet Slate, 2-in-1, and Convertible form factors**

*Source: IDC EMEA, October 2014 – For Internal Use Only*
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>74,563</td>
<td>4.6%</td>
<td>5.1%</td>
<td>51.72</td>
<td>78,727</td>
<td>91,875</td>
<td>43.7%</td>
<td>20.8%</td>
</tr>
<tr>
<td>Utilities</td>
<td>12,793</td>
<td>4.8%</td>
<td>7.6%</td>
<td>8,660</td>
<td>12,252</td>
<td>15,425</td>
<td>18,556</td>
<td>41.5%</td>
</tr>
<tr>
<td>Transport/Storage</td>
<td>93,506</td>
<td>12.1%</td>
<td>15.5%</td>
<td>49,597</td>
<td>58,149</td>
<td>70,011</td>
<td>81,143</td>
<td>17.2%</td>
</tr>
<tr>
<td>Distribution</td>
<td>196,874</td>
<td>8.1%</td>
<td>9.3%</td>
<td>150,843</td>
<td>195,192</td>
<td>228,570</td>
<td>262,398</td>
<td>29.4%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>66,880</td>
<td>7.2%</td>
<td>8.2%</td>
<td>74,899</td>
<td>105,774</td>
<td>134,967</td>
<td>165,065</td>
<td>41.2%</td>
</tr>
<tr>
<td>Finance</td>
<td>68,210</td>
<td>10.5%</td>
<td>11.9%</td>
<td>22,924</td>
<td>48,149</td>
<td>63,460</td>
<td>75,136</td>
<td>110.0%</td>
</tr>
<tr>
<td>Government</td>
<td>49,892</td>
<td>7.4%</td>
<td>8.3%</td>
<td>39,774</td>
<td>43,720</td>
<td>52,333</td>
<td>61,334</td>
<td>9.9%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>136,393</td>
<td>7.6%</td>
<td>8.7%</td>
<td>290,528</td>
<td>341,621</td>
<td>415,070</td>
<td>490,198</td>
<td>17.6%</td>
</tr>
<tr>
<td>Education</td>
<td>503,779</td>
<td>8.7%</td>
<td>9.5%</td>
<td>290,528</td>
<td>369,833</td>
<td>458,963</td>
<td>553,509</td>
<td>27.3%</td>
</tr>
<tr>
<td>Services</td>
<td>397,023</td>
<td>8.5%</td>
<td>9.6%</td>
<td>159,545</td>
<td>228,456</td>
<td>264,780</td>
<td>305,027</td>
<td>43.2%</td>
</tr>
<tr>
<td>Total</td>
<td>1,599,914</td>
<td>8.2%</td>
<td>9.2%</td>
<td>1,136,058</td>
<td>1,466,316</td>
<td>1,782,306</td>
<td>2,104,241</td>
<td>29.2%</td>
</tr>
</tbody>
</table>

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Commercial includes here all company sizes from 10 to 500+ employees – excludes 1-9 employees
% of devices include PC, Tablet, Hybrid, Handheld Devices, SmartPhones (and POS in distribution sector)
% of clients include PC, Tablet, Hybrid and Handheld Devices

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