

Mobility Index Report Q2 2015

Report on App, Platform and
Device Preferences from the
Leader in Secure Mobility

August 2015



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This report is part of the **Good Technology™ Mobility Index**, an ongoing initiative to track and analyze the impact of mobile apps and platforms. This document presents the details of the Good Mobility Index and the methodology behind it.

Good is uniquely positioned to provide insight into the adoption of new mobile apps, platforms and devices. As the pioneer and leader in Secure Mobility, Good has been providing the Mobility Index since 2010, giving organizations visibility into the trends and adoption of mobility in some of the world largest companies. Good today is installed in more than 50% of the FORTUNE® 100, including 100% of the FORTUNE® 100 commercial banks, aerospace and defense firms, as well as customers across a wide range of industries.

Leveraging data collected from our extensive customer base using the **Good Dynamics® Secure Mobility Platform** or **Good for Enterprise®**, Good is reporting on enterprise mobile application adoption in addition to device activations.

OVERALL HIGHLIGHTS



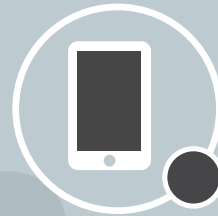
Organizations are using multiple apps with 67% of organizations using two or more apps beyond email.



Public sector and business services are focusing on document workflows with half or more of all apps fulfilling this use case.



Secure browser remains the most popular app outside of email. Custom apps follow as next most popular app category.



iOS remains the market share leader though it saw a slight drop in overall market share this quarter.



Financial services and energy are increasingly adopting custom apps, joining insurance as most aggressive adopters.



The tablet market gets crowded with both Windows and Android showing significant gains, eroding iOS's previous dominance.

Detailed Findings

Good Technology analyzed both the mobile apps and devices activated by its customers over the second quarter of 2015 to highlight trends in mobility, app and device preference.





Organizations Adopt Multiple Apps

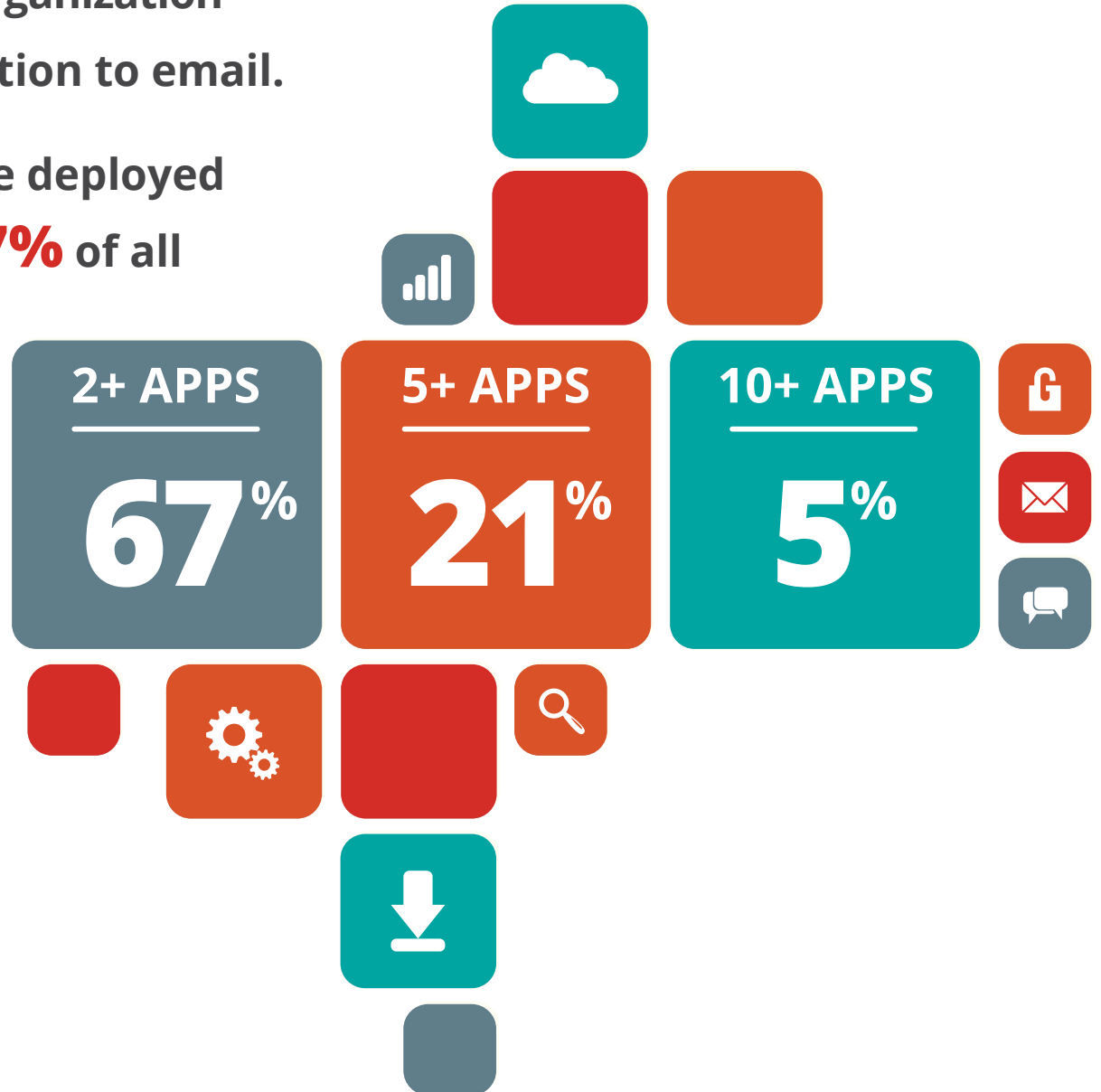
Organizations continue to adopt an increasing variety of apps.

Overall, the average organization uses **3.43** apps in addition to email.

Among those who have deployed apps beyond email, **67%** of all organizations have deployed two or more such apps.

21% have deployed five or more apps

and **5%** have deployed 10 or more.





Secure Browser Continues to Lead All Apps

For the third quarter in a row, **secure browser** led all app categories, representing **21%** of all apps deployed by organizations. The continued strength of this category reflects the growing demand for secure access to the corporate intranet.

Custom apps followed close behind, leapfrogging **Secure IM** into second place. As organizations move into greater mobile maturity they are increasingly mobilizing their unique business processes.



Secure Browser

Top 5 App Categories Across Devices



Custom Apps



Secure IM



Document Access

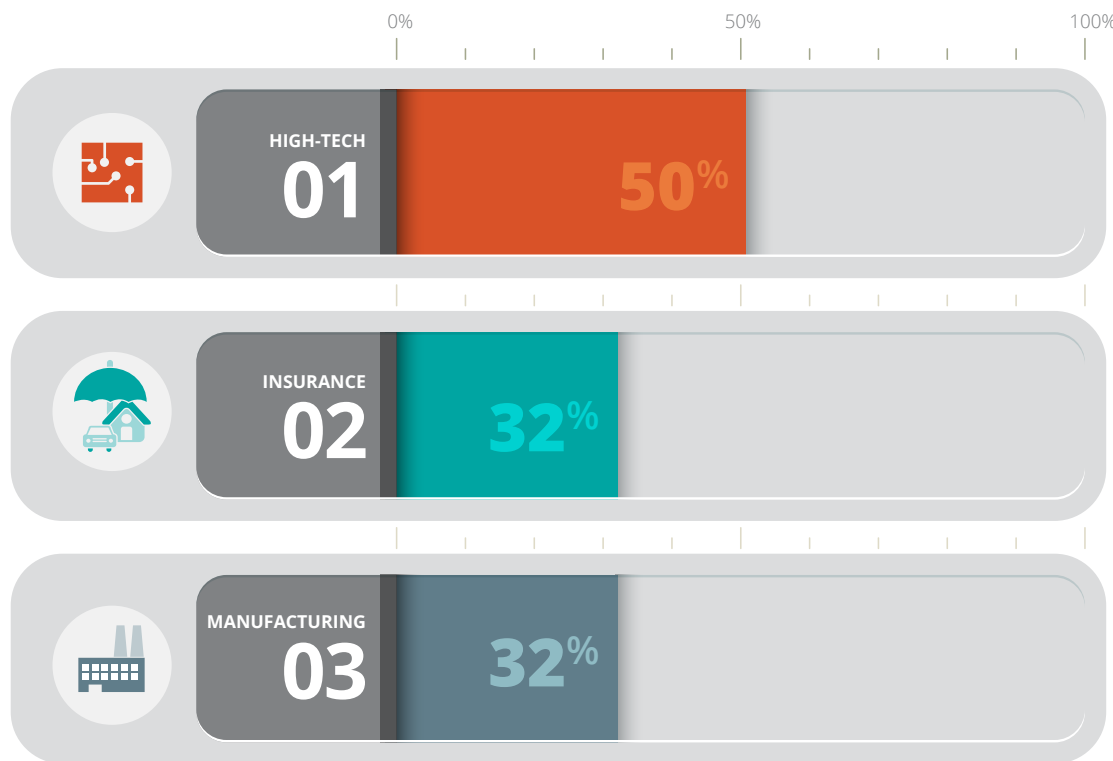


Document Editing



Secure Browsers Gain Widespread Adoption Across All Industries

While many organizations are focusing on unique apps tied to their specific business, the secure browser enjoyed widespread adoption across all industries. With one exception, it registered in the double digits in every industry.



From **high tech**, where it made up half of all apps, to **insurance** to **manufacturing**, the secure browser proved applicable to knowledge workers and industrial workers alike.

No matter the industry, access to corporate information behind the firewall is a common need for all mobile workers.





Custom Apps Find a Home in Growing Set of Industries

Last quarter **insurance** emerged as an aggressive adopter of custom apps. That trend continued this quarter with **32%** of all insurance industry apps being custom. However, the popularity of custom apps expanded in a number of other industries as well.



For example, **29%** of **financial services** apps were custom apps, up from 18% last quarter.



The biggest custom app growth happened in **energy and utilities**. In this industry custom apps grew from a negligible number to **49%** in just one quarter.

The spread of custom apps demonstrates how using mobility for business transformation is moving beyond the early adopters and gaining widespread traction.



Public Sector Mobilizes Document Workflows

Globally, government agencies and other public sector institutions focused their mobile initiatives on the document-based workflows that are critical to many e-government processes.



47%

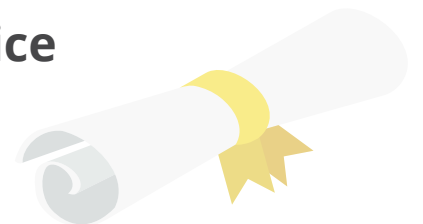
of app activations in public sector were for **document editing** apps.



23%

were **document access** apps.

Through better access to and faster processing of documents, government agencies are using mobility to improve their service to the public.

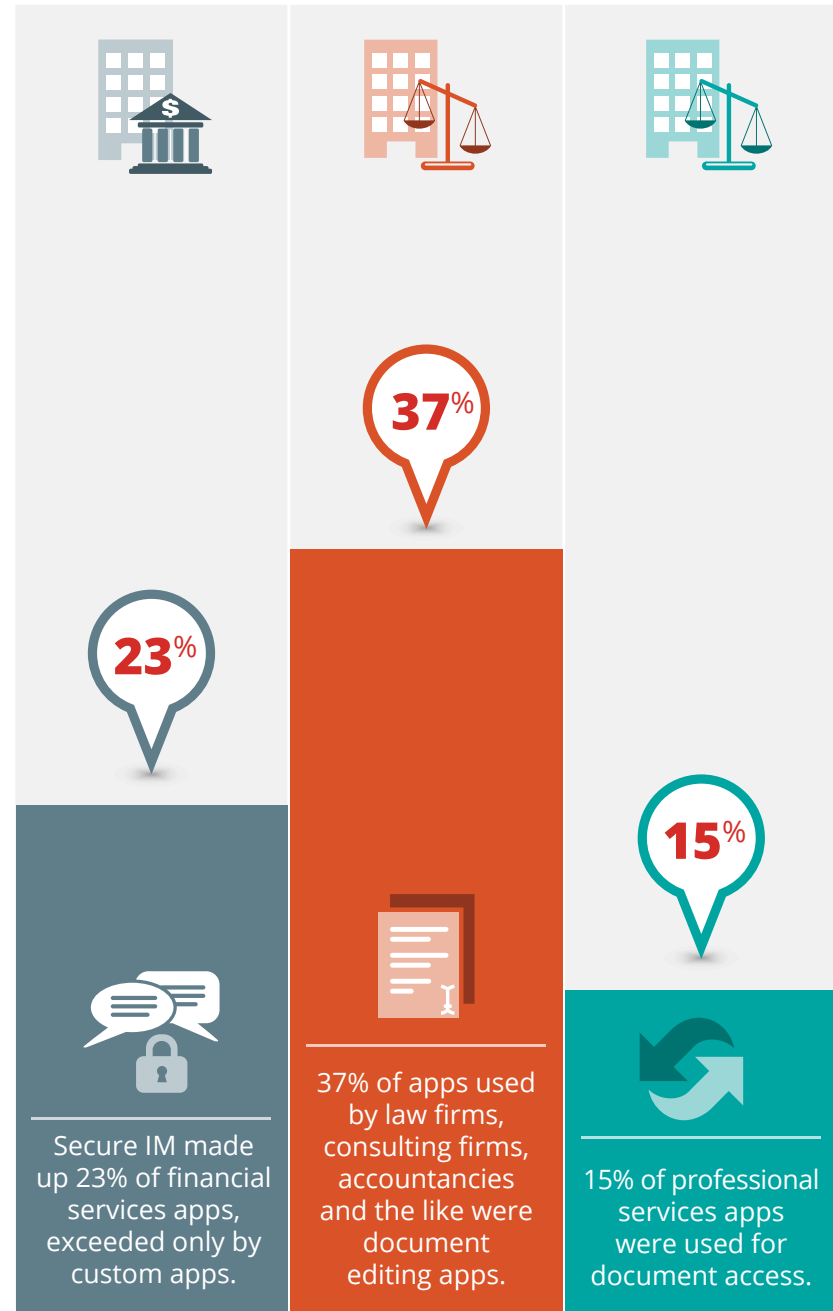




IM Remains Key for Finance, Documents for Business Services

Several key trends continued from last quarter. Financial services firms, where speed to decision is key to profitability, continued to invest heavily in secure instant messaging.

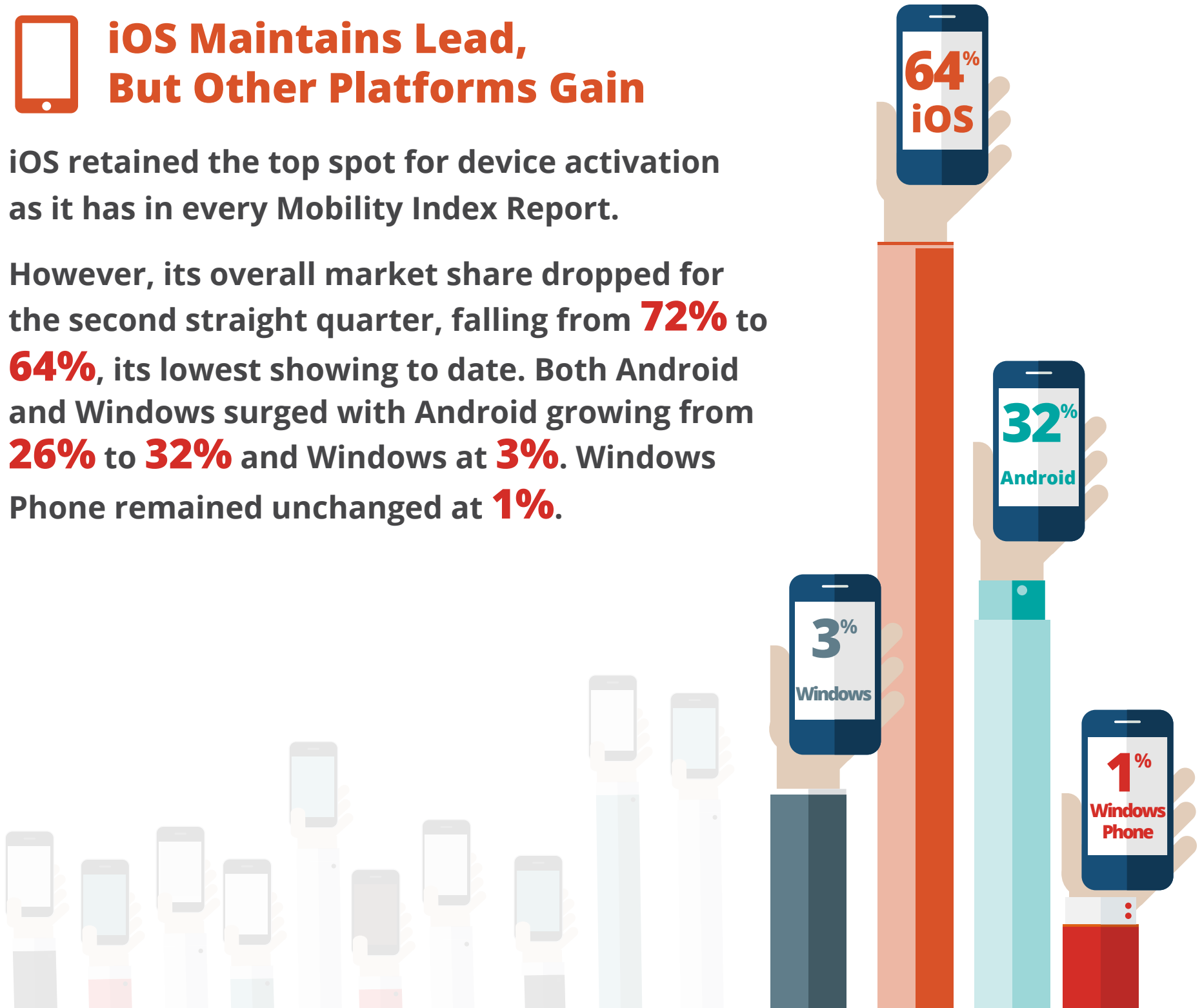
Business and professional services, like public sector, invested in document workflows.



iOS Maintains Lead, But Other Platforms Gain

iOS retained the top spot for device activation as it has in every Mobility Index Report.

However, its overall market share dropped for the second straight quarter, falling from **72%** to **64%**, its lowest showing to date. Both Android and Windows surged with Android growing from **26%** to **32%** and Windows at **3%**. Windows Phone remained unchanged at **1%**.

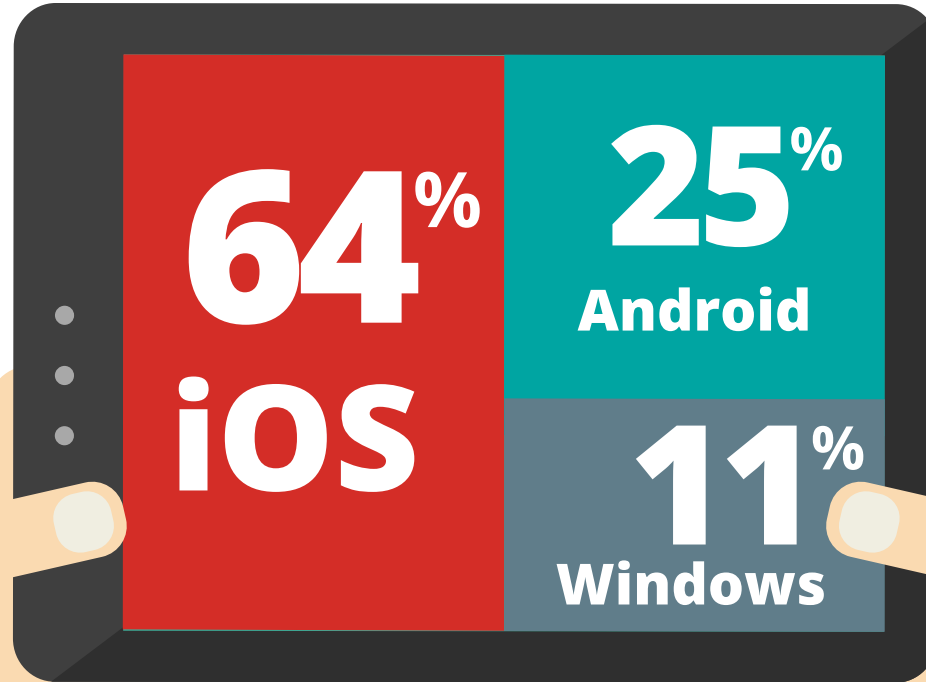




Android and Windows Surge in Tablets

Over the last year, the iPad dominated tablets, comprising 80%-90% of activations every quarter. In Q2, the tablet market dramatically shifted.

iOS fell from **81%** of activations to **64%**. Android grew from **15%** to **25%** while Windows surged from **4%** to **11%**.



The growth of Windows, which includes both Surface devices and devices from Windows OEMs, was especially impressive given that only two quarters ago Windows made up only **1%** of tablets.

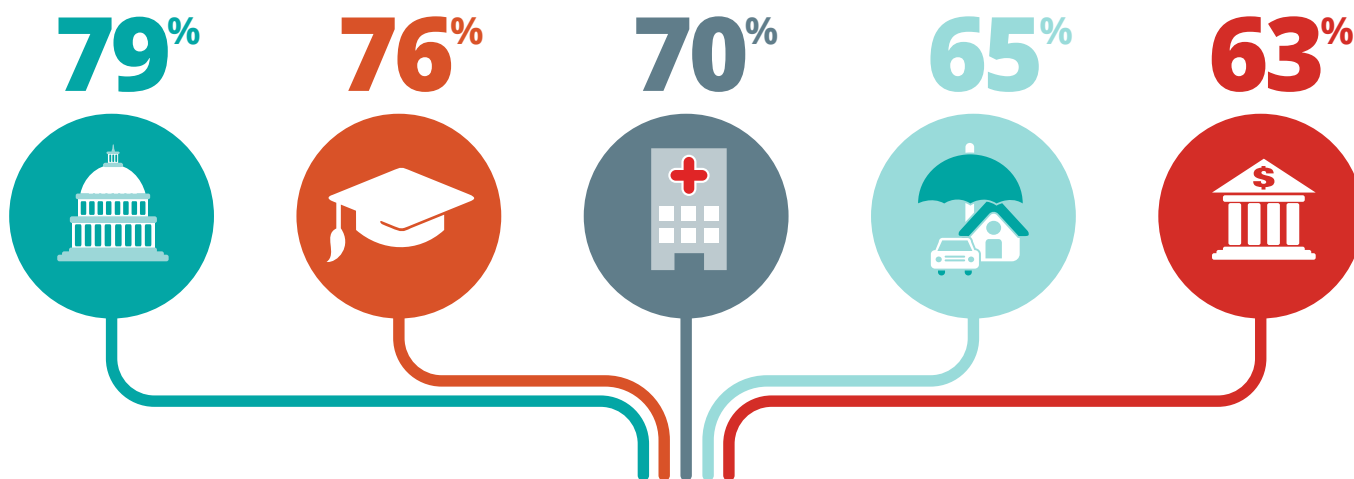
The erosion in iPad dominance points to a change in the tablet market as the long-predicted role of tablets as laptop replacements finally becomes a reality.



iOS Maintains Strength in Regulated Industries



Device adoption varies significantly among industries. For the third quarter in a row, iOS significantly outpaced Android in regulated industries.

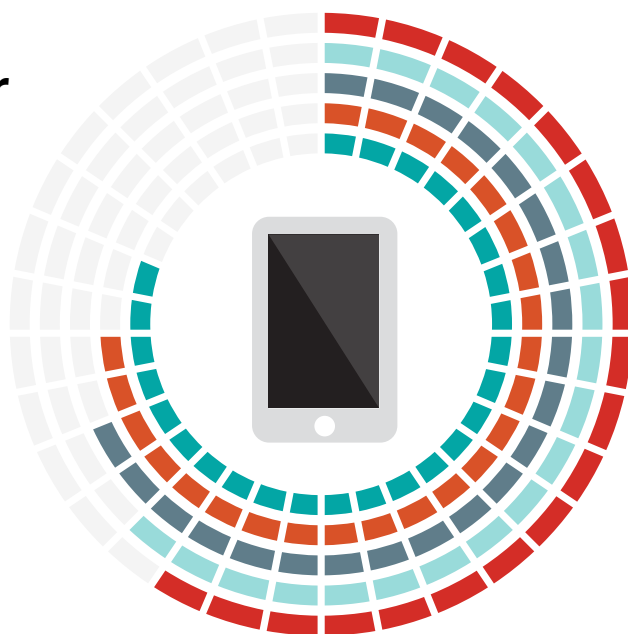


79% of **public sector** activations,

70% of **healthcare**,

65% in **insurance**,

63% in **financial services** were iOS devices.



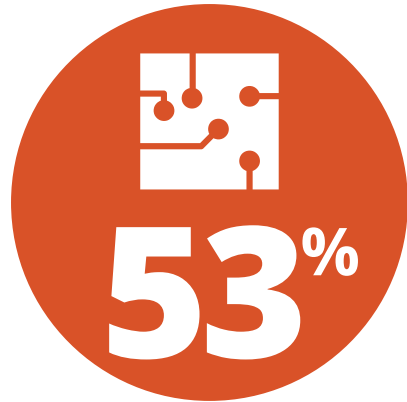
iOS also maintained its strength in **education** where it made up **76%** of all devices.



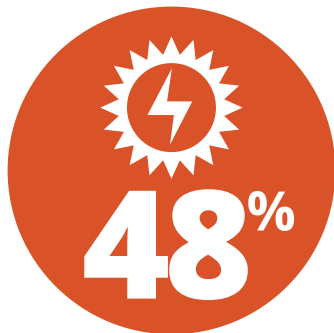


Android Takes the Lead in High-Tech

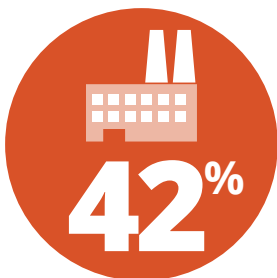
While Android in recent quarters has shown strength in the tech sector, it historically lagged iOS in all industries.



For the first time, Android moved ahead of iOS in **high-tech** with **53%** of devices.



Android also saw gains in **energy** reaching **48%**.



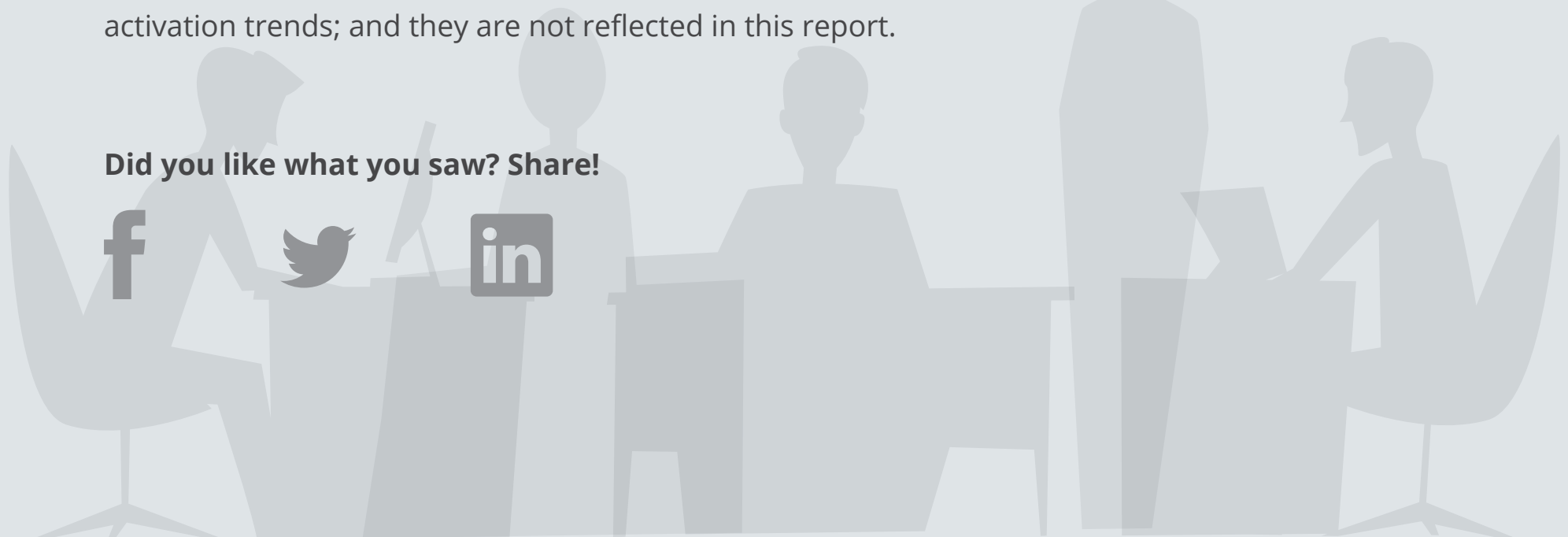
Android also gained in **manufacturing** reaching **42%**.

Overview of Good Mobility Index Methodology

The metrics cited in this report have been directly generated from Good's internal data, as aggregated from all devices activated across Good's worldwide customer base in **Q2 2015**.

Good analyzed activations, by month, among all its global customers that had at least five activated devices over the quarter. Good also analyzed app usage for all apps with at least five installations. Due to the fact that RIM devices use only the BlackBerry® Enterprise Server for corporate email access, Good does not have insight into BlackBerry handset activation trends; and they are not reflected in this report.

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ABOUT GOOD

Good Technology is the leader in secure mobility, delivering solutions across all stages of the mobility lifecycle for enterprises and governments worldwide. Good offers a comprehensive, end-to-end solutions portfolio, consisting of a suite of collaboration applications, a secure mobility platform, mobile device management, unified monitoring, management and analytics, and a third-party application and partner ecosystem. More than 6,200 organizations in 189 countries use Good Technology, and we are trusted and deployed in 100% of the FORTUNE® 100 commercial banks and aerospace and defense firms as well as leaders across healthcare, manufacturing and retail. Learn more at www.good.com.

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