

# GLOBAL TECHNOLOGY ADOPTION INDEX 2015

## CHAPTER 1

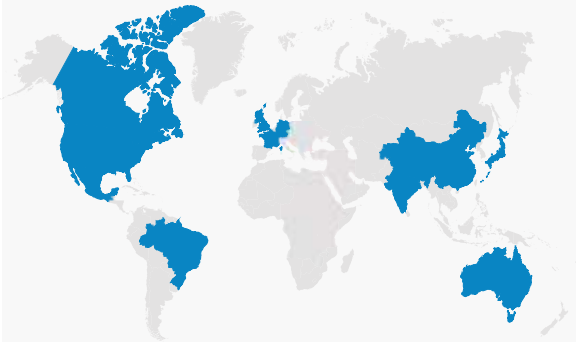
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# ABOUT THE GLOBAL TECHNOLOGY ADOPTION INDEX

2015 is the second annual study—first was released at Dell World 2014

Representative global coverage  
across **11 countries**



**2,900 IT and business decision-makers** in mid-market organizations  
(100–4,999 employees)



were asked about **solution** maturity levels, adoption drivers and inhibitors

First chapter of results, with **industry-specific findings** to follow throughout 2016

Healthcare

Government

Education

Banking & Financial Services

Dell commissioned, TNS conducted  
All findings are correlations, not causations



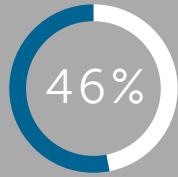
Organizations investing in big data, cloud and mobility experience **higher growth rates.**

Organizations are also recognizing the **advantages of security.**

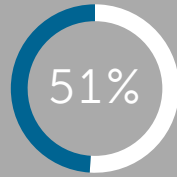
ORGANIZATIONS ACTIVELY USING BIG DATA, CLOUD AND MOBILITY are growing up to 53% faster than laggards.



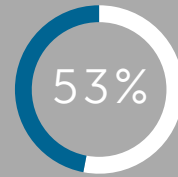
Big Data



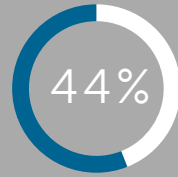
On-premises



Off-premises



BYOD



Mobile Applications

ORGANIZATIONS ARE BECOMING **more strategic** in their security investments.

On average, **54% of an organization's security budget** is spent on implementing security plans rather than reacting to threats.



**In North America and Western Europe,** strategic approaches to security are gaining ground.

Security is being used to **enable new things** or **drive a competitive advantage.**



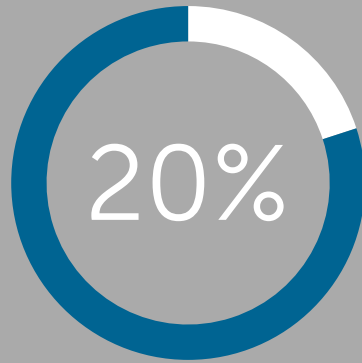
Up from **25%** to **35%**



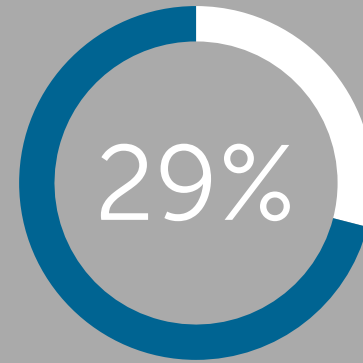
Up from **26%** to **30%**

Despite the strong link between technology use and revenue growth, **perceived cost is a chief barrier.**

#### COST IS THE TOP BARRIER FOR BIG DATA.



In organizations that have big data but are not yet using it, **the top barrier is not knowing if the benefits are worth the cost.**



In organizations currently using big data, **the top barrier when extracting big data insights is the cost of the IT infrastructure.**

The second biggest barrier is securing the data, **28%.**

#### FOR CLOUD, COST AND SECURITY ARE THE BIGGEST BARRIERS.



Cost is the biggest barrier to adopting:

**private cloud: 28%** short-term cost risks, **23%** long-term cost risks

**managed private cloud: 28%** short-term cost risks, **23%** long-term cost risks

**hybrid cloud: 30%** short-term cost risks, **24%** long-term cost risks

**42%** of organizations not yet formally using cloud say **security issues are the top reason —**

far more than any other reason named. Security is also most frequently the top risk of adopting public cloud (44%) and SaaS (38%).



Despite the strong link between technology use and revenue growth, **perceived cost is a chief barrier.**

FOR MOBILITY, SECURITY CONCERNS ARE THE BIGGEST BARRIER, COST IS SECOND.



**42%** Most frequent barrier to *expanding* mobility: **Security and fear of data breach**

**LIMITED BUDGET IS THE SECOND BIGGEST BARRIER TO *EXPANDING* MOBILITY AT 34%.**

Biggest concerns for organizations *implementing* mobility strategies:

**45%** Data breaches

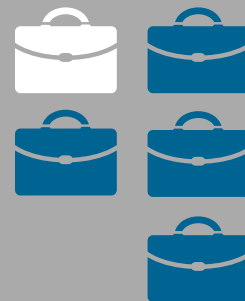
**43%** Data residing on employee-owned devices

COST IS A SIGNIFICANT BARRIER TO SECURITY IMPLEMENTATION.

**<\$100,000** IT annual spend level, fewer than **1 in 5** organizations have comprehensive security plans.

**<\$25,000** IT annual spend level, fewer than **half** have security plans at all.

**<\$10,000** IT annual spend level, nearly **1 in 5** have nothing at all—not even informal guidelines.



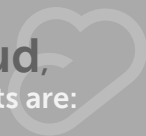
Cloud, mobility,  
security and big  
data fuel  
**organizational  
efficiency and  
growth goals.**

ORGANIZATIONS USING  
**MOBILITY AND CLOUD** CITE



IMPROVED **ORGANIZATIONAL  
EFFICIENCY** AS A KEY BENEFIT.

For cloud,  
top 3 benefits are:



42%

Cost  
savings

40%

Getting things  
done faster

38%

Better allocation  
of IT Resources

**39%**

Of organizations globally say  
**improved efficiency**  
is #1 benefit from **mobility strategy**



ORGANIZATIONS USING  
**SECURITY AND BIG DATA**



REPORT KEY OUTCOMES RELATED TO  
**ORGANIZATIONAL GROWTH GOALS.**

Big data  
benefits help retain,  
grow customers:



41%

better targeting of  
marketing efforts

37%

optimize advertising  
spending

37%

optimize social-  
media marketing

For security, the ability to  
**respond more quickly to market  
conditions** is a key benefit



**77%**

fledgling IT  
security programs

**78%**

established  
security solutions

The business is leading **big data** and **mobility** adoption, but partnering closely with IT for **cloud** and **security** adoption.

ORGANIZATIONS GLOBALLY NAME BUSINESS ROLES AS LEADING ADOPTION OF BIG DATA AND MOBILITY, MUCH MORE FREQUENTLY THAN IT ROLES.



Business roles are named **18% more frequently** than IT roles as leading adoption.



Business roles are named **42% more frequently** than IT roles as leading adoption.

THE BUSINESS AND IT ARE PARTNERING CLOSELY TO PUSH CLOUD AND SECURITY ADOPTION FORWARD.



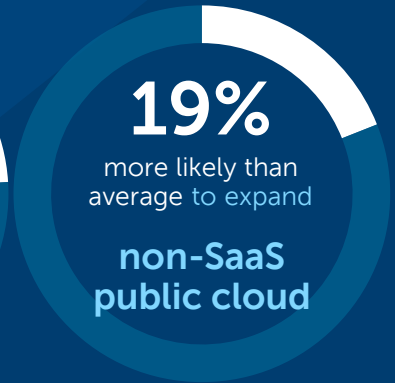
In the case of cloud and security, business roles are named roughly as often as IT roles as leading adoption.

CLOUD ADOPTION IS UNIQUELY  
DRIVEN BY EXPECTATIONS OF

# greater organizational speed and employee satisfaction.



Organizations  
with speed  
as a goal  
for their IT  
priorities are:



Those with employee satisfaction as a goal are **15% more likely to expand private cloud use** and **16% more likely to expand SaaS use.**



# Cloud use continues to increase in mid-sized organizations,

WITH WESTERN EUROPE SEEING  
THE MOST GROWTH.

GLOBALLY, CLOUD USE  
CONTINUES TO DIVERSIFY AS

**more organizations  
use multiple types  
of cloud services.**



GLOBALLY, CLOUD USE IS UP FROM

**79%** → **82%**  
(2014) (2015)

Of all countries surveyed, France had the highest cloud use increase of 12 percentage points, from **70% in 2014** to **82% in 2015**.



AS CLOUD USAGE RATES INCREASE, SO DO THE NUMBER OF DIFFERENT TYPES OF CLOUDS ORGANIZATIONS ARE USING.

In 2014, half of organizations globally indicated use of more than one type of cloud.



That number has risen to **55% in 2015**.

ORGANIZATIONS GLOBALLY  
ARE MOVING FURTHER AWAY  
FROM ALLOWING

**employee-owned  
devices to access  
a company's  
cloud resources.**



PCs are more strictly regulated, with **71% allowed access** to cloud resources if organization-owned (up from 67% in 2014), but **only 28% allowed if employee-owned.**

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THE SHARE OF ORGANIZATIONS  
ALLOWING ACCESS TO CLOUD  
RESOURCES FROM EMPLOYEE-  
OWNED SMARTPHONES FELL



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WHILE THE SHARE ALLOWING SUCH  
ACCESS FROM COMPANY-OWNED  
SMARTPHONES GREW



WHILE COMPANIES WHO HAVE  
HIGH GROWTH RATES HAVE

a strategic  
approach  
to mobility, but...



ORGANIZATIONS THAT HAVE  
NEGATIVE GROWTH ARE

NEARLY  
**2X**

AS LIKELY

to approach mobility strategically  
(24%) than their counterparts who  
have **zero growth (13%).**

ORGANIZATIONS GLOBALLY WITH  
BETTER SECURITY AS A BUSINESS GOAL

seem to place  
higher value  
on security  
planning.



Of those organizations  
having a plan for  
some or all types  
of security incidents



Unlike their  
counterparts where  
security is not  
a business goal

GLOBALLY, THERE'S NO SIGNIFICANT  
IMPROVEMENT YEAR OVER YEAR IN

**gaining more  
information to make  
better risk-based  
decisions...**

but North America is leading  
the change.



YEAR OVER YEAR NO  
IMPROVEMENT IN GAINING  
MORE INFORMATION TO MAKE  
RISK-BASED DECISIONS

**30%** → **31%**  
(2014) (2015)



NORTH AMERICA IS IMPROVING IN  
HAVING MORE/BETTER INFORMATION  
TO MAKE RISK-BASED DECISIONS.

Those that say “yes”  
to having more/better  
information are up from

**29%**  
in **2014**  
to **41%**  
in **2015.**



A YEAR LATER...

**44% of  
organizations  
globally still aren't  
sure how to  
approach big data...**

but North America is closing the gap.





Although the number of organizations who aren't sure how to approach **big data** remained the same at 44%



THE NUMBER OF ORGANIZATIONS GLOBALLY WHO UNDERSTAND THE BENEFITS OF BIG DATA GREW SLIGHTLY FROM

**39%** → **42%**  
(2014) (2015)



THE NUMBER OF NORTH AMERICAN ORGANIZATIONS THAT BELIEVE THEY HAVE BIG DATA THAT CAN BE ANALYZED GREW SIGNIFICANTLY

**54%** → **73%**  
(2014) (2015)

North American organizations also saw an increase in how well they think they are taking advantage of big data, from 64% in 2014 to 69% in 2015.



The power to do more