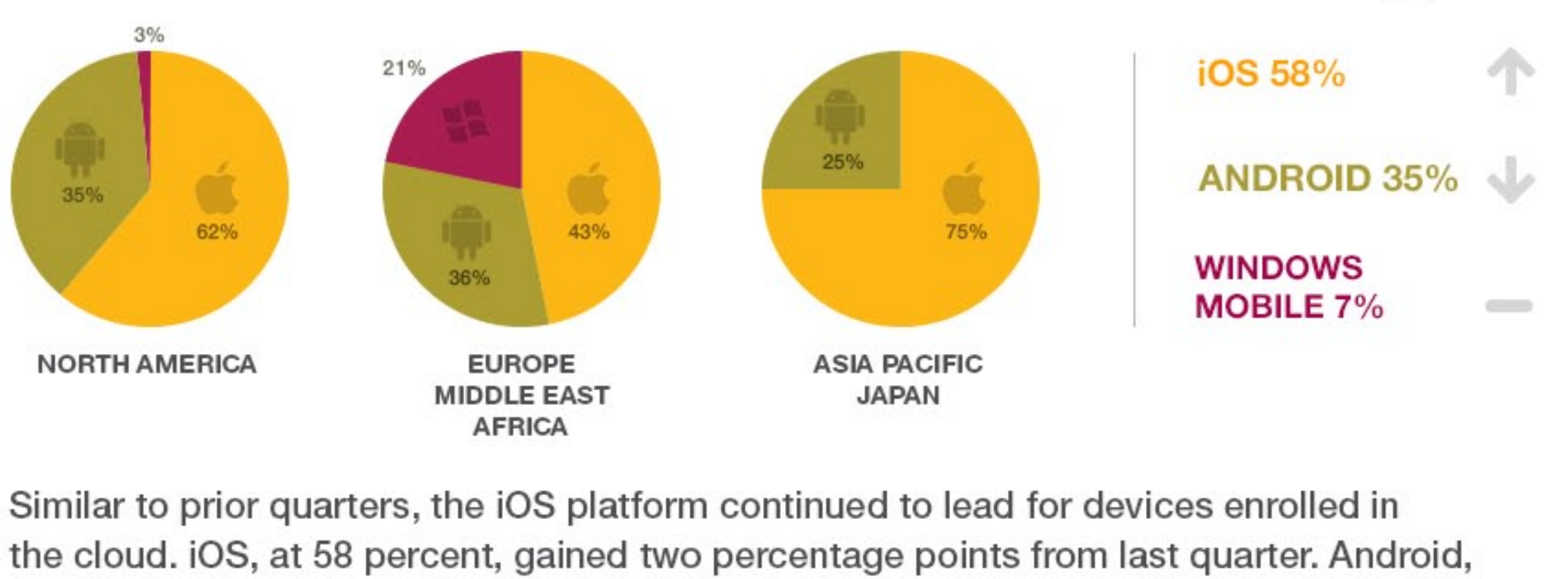# Enterprise Mobility Cloud Report
Q4 2012

This quarterly report of enterprise mobility practices is based on aggregate data from Citrix customers who have deployed enterprise mobility management in the cloud.
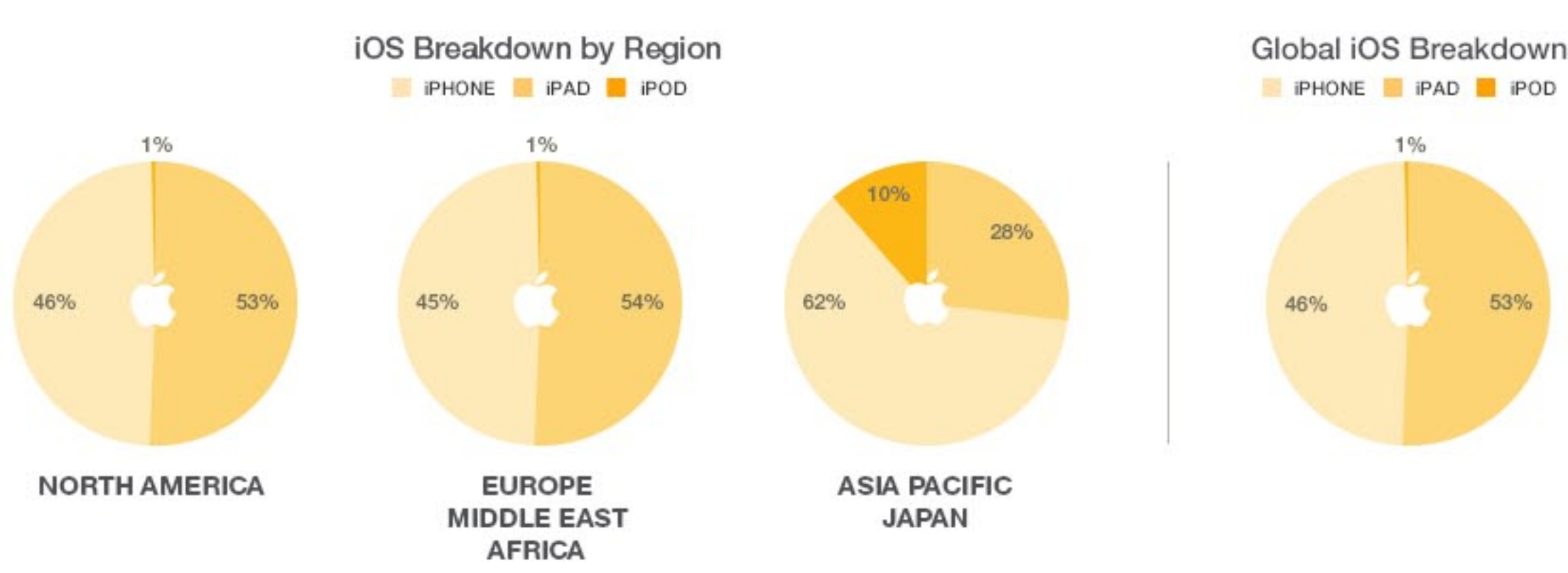
Q4 2012 Highlights

- iOS continued to dominate the enterprise as the mobile platform of choice with 58 percent of global devices enrolled. Android was the fastest growing platform in Europe, the Middle East, and Africa with an 11 percent gain from the prior quarter.
- iOS was the preferred platform for vertical industries in which mobile users engage customers one-on-one, such as in retail and restaurants. Android was the preferred platform for those with mobile field service organizations, such as in transportation and utilities.
- Organizations got more aggressive on app blacklisting , with 18 percent of customers deploying this policy, an increase of eleven percent from the prior quarter. Typically, organizations blacklist apps they feel pose a threat to data or network security or are considered a productivity drain. Often associated with corporate-issued line-of-business use cases, a rise in blacklisting usually indicates an increase in such deployments.

Device Enrollment

Device Enrollment

OS Breakdown by Region

iOS | ANDROID | WINDOWS MOBILE

NORTH AMERICA: 3%, 95%, 3%
EUROPE MIDDLE EAST AFRICA: 21%, 45%, 43%
ASIA PACIFIC JAPAN: 28%, 75%,

Global Enrollment and Qtr/Qtr. Trending by Platform

iOS 58%
ANDROID 35%
WINDOWS MOBILE 7%

Similar to prior quarters, the iOS platform continued to lead for devices enrolled in the cloud. iOS, at 58 percent, gained two percentage points from last quarter. Android, at 35 percent, lost two. Windows Mobile remained the same at 7 percent, and Symbian was negligible.

- North American deployments (accounting for 71 percent of device enrollments worldwide) saw an increase in iOS, largely at the expense of Android, with iOS at 62 percent, Android at 35 percent, and Windows Mobile at 3 percent.
- Europe, Middle East, and Africa (accounting for 27 percent of device enrollments worldwide) saw its iOS penetration drop from 56 to 43 percent. Android increased 11 points to 36 percent, and Windows Mobile gained 2 points to 21 percent.
- In Asia Pacific/Japan (accounting for 2 percent of device enrollments worldwide), we continued to see iOS dominance, with iOS gaining 7 points of share to 75 percent and Android losing 7 points to 25 percent. Despite growth in device enrollments in the region, our Asia Pacific/Japan numbers continue to be skewed by a smaller number of customer deployments.
- Something to consider with increased Android usage is the increase in mobile malware that the industry saw over the past year. Whereas the number of unique malware samples detected in reputation systems totaled in the low thousands (versus 50,000 to 100,000 detected per day in non-mobile), antivirus vendor McAfee saw a rise to nearly 40,000 in 2012, with 97 percent Android-based.

iOS Breakdown by Region

iPHONE | iPAD | iPOD

NORTH AMERICA: 1%, 46%, 53%
EUROPE MIDDLE EAST AFRICA: 1%, 45%, 54%
ASIA PACIFIC JAPAN: 10%, 28%, 62%

Global iOS Breakdown
iPHONE | iPAD | iPOD
1%, 46%, 53%

Within iOS, iPads represented 53 percent of deployed iOS devices, with iPhones at 46 percent and iPods at 1 percent. This represents a 4 percent shift from iPads to iPhones from last quarter.

- In Asia Pacific/Japan, iPads represented 28 percent of enrolled iOS devices, a far lower percentage than the rest of the world.
- In Europe, Middle East, and Africa, iPads had the highest iOS penetration at 54 percent.

Top Vertical Industries' Device Adoption by OS
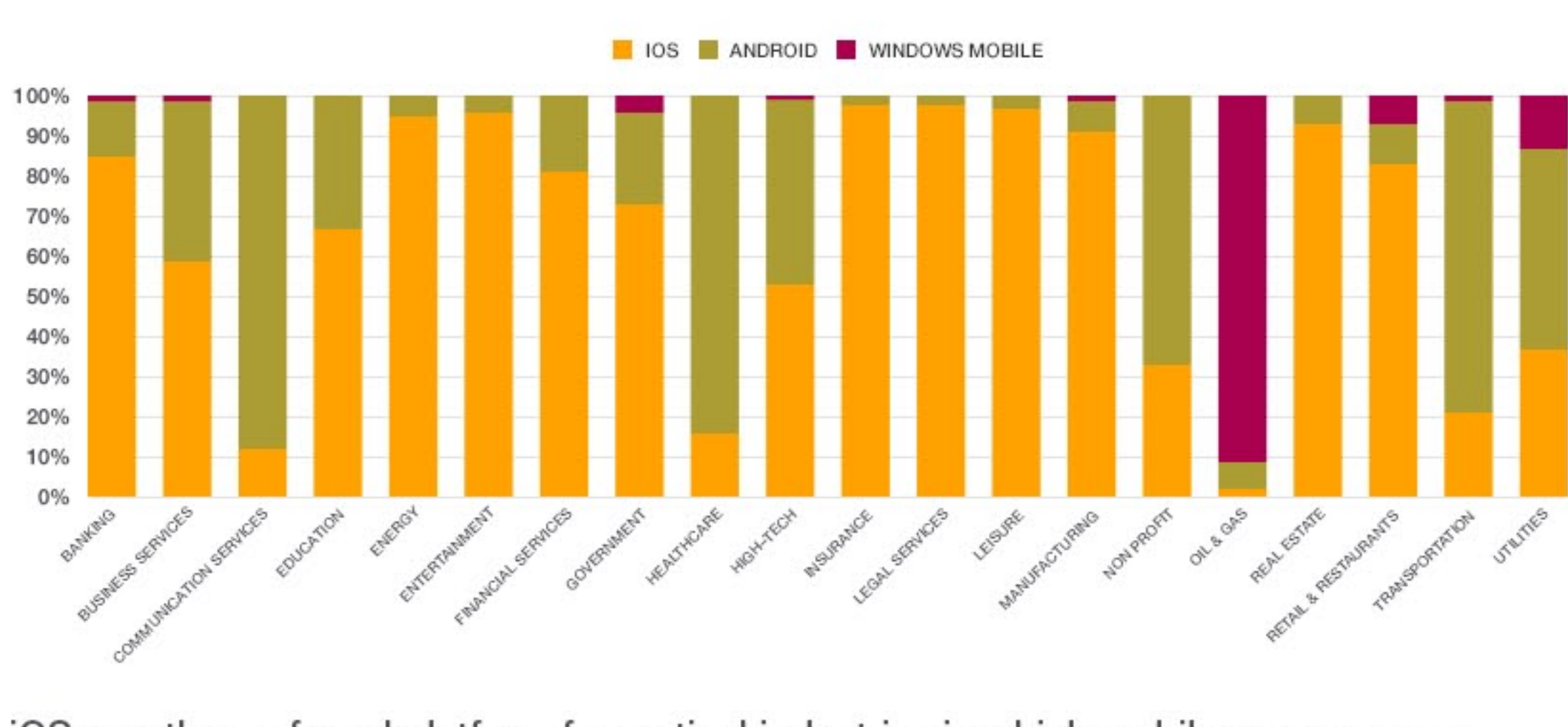
iOS | ANDROID | WINDOWS MOBILE

iOS was the preferred platform for vertical industries in which mobile users engage customers one-on-one, such as in retail and restaurants. Android was the preferred platform for those with mobile field service organizations, such as in transportation and utilities. The largest adopters of Android were the same three verticals as last quarter, but in a slightly different order: communications services, healthcare, and transportation. The largest adopters of iOS include the energy, legal, and insurance industries.
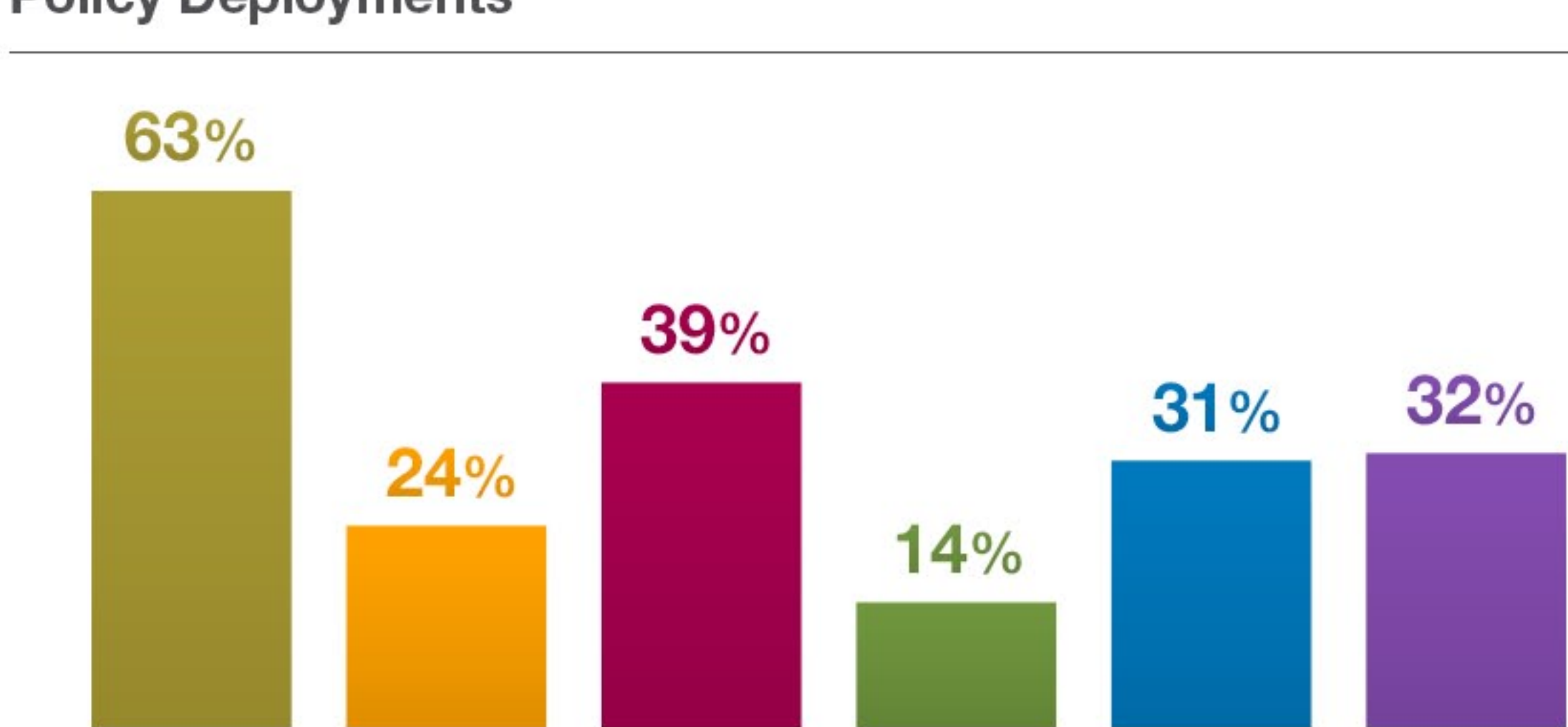
- Compared to last quarter, there was a significant increase in Android adoption amongst non-profits, education, and communications services. iOS adoption increased in transportation, government, and retail and restaurants.
- Whereas anecdotally we see high iOS adoption in traditional hospital settings, cloud deployments of enterprise mobility management in healthcare tend to be mobile healthcare organizations such as home healthcare groups, and for them, Android has been the platform of choice since we've been measuring industry adoption.

Top 10 Industries Using iOS by Device Type

iPHONE | iPAD | iPOD

Among the industries adopting iOS, the ones with the biggest iPad penetration were legal, retail and restaurants, real estate, and manufacturing, while the ones with the biggest iPhone penetration were energy, banking, insurance, and financial services. The iPod was the most popular device in the leisure sector.

Policy Deployments

PASSCODE: 63%
VPN: 24%
GPS: 39%
TWO-FACTOR AUTHENTICATION: 14%
WIFI: 31%
RESTRICTION OF DEVICE RESOURCES OR APPS: 32%

Organizations continued to deploy mobile policies associated with protecting data and line-of-business mobile worker initiatives.

- The passcode remained the most commonly deployed policy at 63 percent (up from 62 percent last quarter), followed by GPS at 39 percent (unchanged).
- Restrictions of device resources or apps (such as Google Play, the device camera, or Bluetooth) increased three percent from last quarter to 32 percent.
- Other policies deployed included VPN at 24 percent, WiFi at 31 percent, and two-factor authentication at 14 percent.

Mobile Apps

Top 20 Apps in Enterprise App Stores

BUSINESS | PRODUCTIVITY | SOCIAL MEDIA | FINANCE | BOOKS | TRAVEL

Organizations continued to make use of mobile apps for productivity and business process. They deployed well over 100 different third-party apps, plus a number of custom apps. The most common third-party mobile apps deployed in the Enterprise App Store include Citrix Receiver, NitroDesk TouchDown, Adobe Reader, Numbers, Box, Concur, Salesforce, Dropbox, Evernote, and iBooks. See the full list of 20 below.

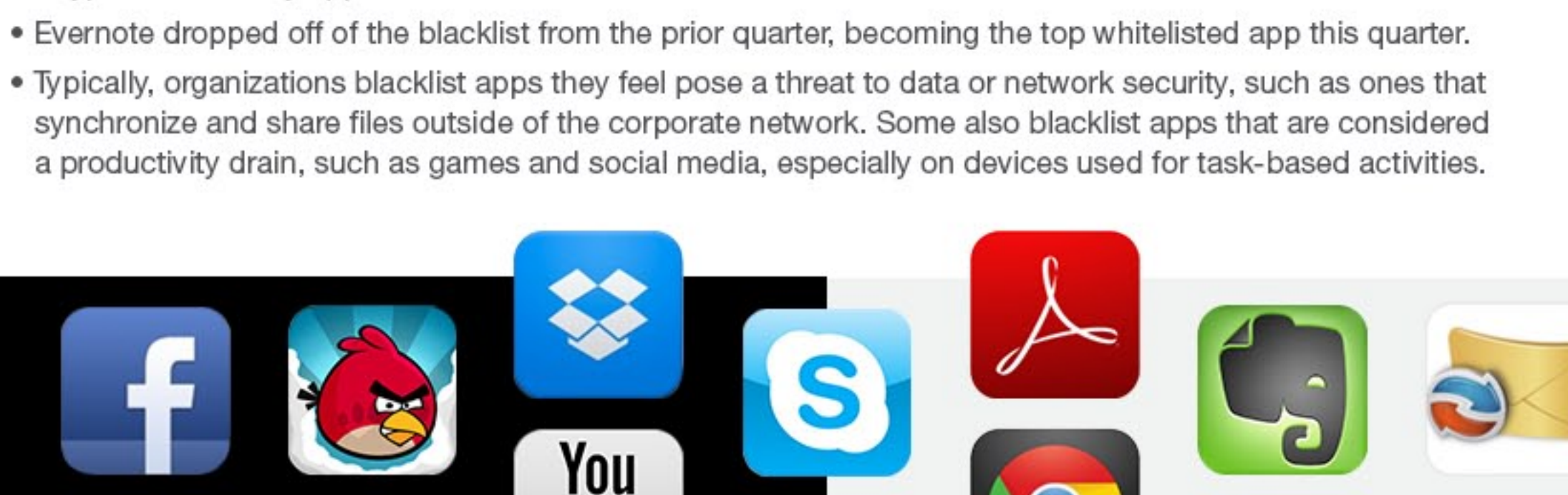### Vertical Cut of Apps in Enterprise App Stores
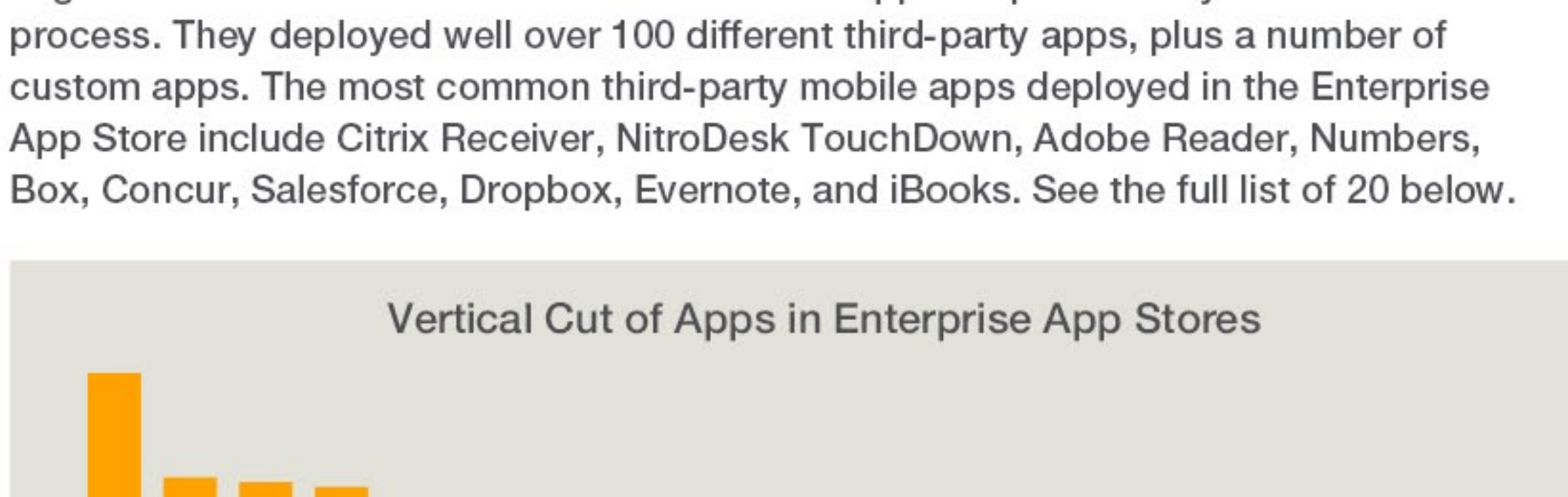
The highest numbers of apps in the Enterprise App Store are in the business services, healthcare, high technology, and government industries. Last quarter the highest penetration of apps was in oil & gas, transportation, and utilities.

Blacklisted and Whitelisted Apps

Organizations got more aggressive on app blacklisting, with 18 percent of customers deploying this policy, an increase of eleven percent from the prior quarter. Often associated with corporate-issued line-of-business use cases, a rise in blacklisting usually indicates an increase in such deployments.

- The most commonly blacklisted apps were Angry Birds, Facebook, Dropbox, YouTube, and Skype, while the most commonly whitelisted apps were Evernote, NitroDesk TouchDown, Skype, Chrome, and Adobe Reader. Skype was the only app that made both the blacklist and whitelist.
- Evernote dropped off of the blacklist from the prior quarter, becoming the top whitelisted app this quarter.
- Typically, organizations blacklist apps they feel pose a threat to data or network security, such as ones that synchronize and share files outside of the corporate network. Some also blacklist apps that are considered a productivity drain, such as games and social media, especially on devices used for task-based activities.

Blacklist

Whitelist