WHITE PAPER

Not All Tablets Are Fit for Enterprise Use

Market Pulse

WHILE CONSUMER-GRADE TABLETS CURRENTLY DOMINATE THE ENTERPRISE, IT ORGANIZATIONS ARE QUESTIONING THEIR LONG-TERM VIABILITY AS A PROFESSIONAL COMPUTING TOOL, CITING LIMITATIONS AROUND FUNCTIONALITY, DURABILITY, AND RELIABILITY.

The tablet, after years of false starts, is finally being taken seriously as a professional computing tool. But as user adoption surges, IT organizations face the reality that popular consumer-grade models are increasingly hamstrung by limited functionality and are not robust enough to withstand rigorous enterprise use.

Tablets are gaining ground in the enterprise for a number of reasons. Drawn in by the lightweight form factor and the promise of "work anywhere" mobility, a growing number of users are finding value in a tool that lets them do more and carry less. At the same time, organizations are highly receptive to replacing paper-based processes, increasing collaboration among employees, and delivering additional functionality and information via custom apps as a way to improve customer service or streamline operations.

According to a recent IDG Market Pulse survey of InfoWorld readers with 1,000 or more employees, 81% of respondents are incorporating tablets into their computing infrastructure as a means of empowering employee mobility, while 68% cite increased employee productivity as their primary motivator. Other reasons for widespread deployment of tablets include facilitating better and faster decision making through near-real-time access to information (53%), bolstering employee satisfaction (44%), and fostering the ability to gather and record information in the field (43%).

Tablets have become more commonplace in the workplace in part because of the exposure business users have had to the technology via their own personal use. With consumer adoption of mobile devices on the rise, users have become accustomed to the convenience of watching video or accessing email on the go, fueling their expectations for a comparable mobile experience in their professional lives.

The desire to have a single device bridge the personal and professional worlds is also having an impact on the corporate computing infrastructure. The phenomenon known as Bring Your Own Device, or BYOD, where users deploy their own tablets and smartphones on the job, is becoming more prevalent in the workplace. As a result, companies find themselves deploying and supporting the more familiar consumer-grade tablets as opposed to enterprise-class tablets, which are considered highly durable and expandable, support more robust security and management capabilities, and are purpose-built to operate in a variety of environments, including out in the field or on the manufacturing floor.

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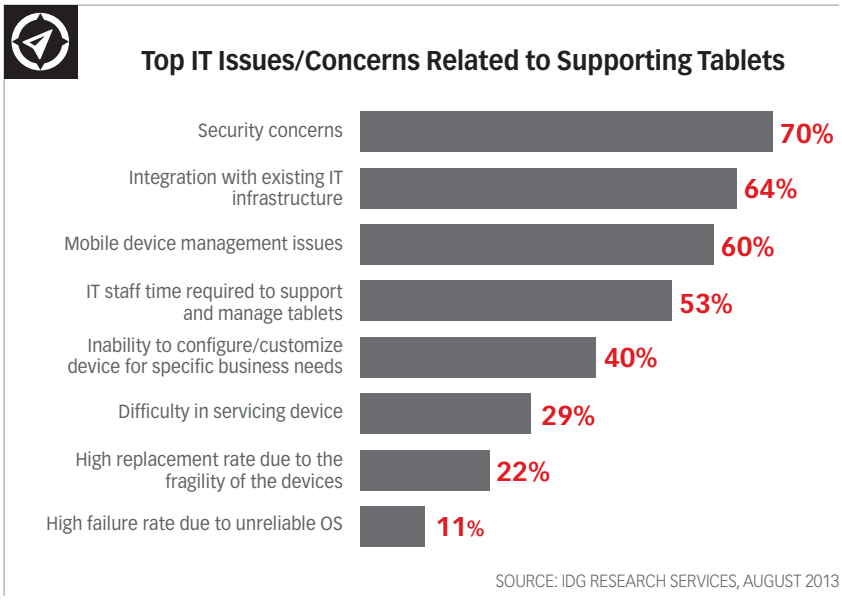


SOURCE: IDG RESEARCH SERVICES, AUGUST 2013

In fact, the IDG Market Pulse research shows that more than half of the companies surveyed are issuing consumer-grade tablets from Apple and Sony to business users, compared with only 26% outfitting employees with enterprise-grade devices like those from Dell and Panasonic. Consumer-grade tablets also tend to be the initial device of choice when a BYOD option is in place—a scenario now supported by 57% of survey respondents, regardless of whether there is a reimbursement plan for the devices or a policy that dictates individuals purchase the equipment on their own.

CONSUMER TABLETS HIT A WALL

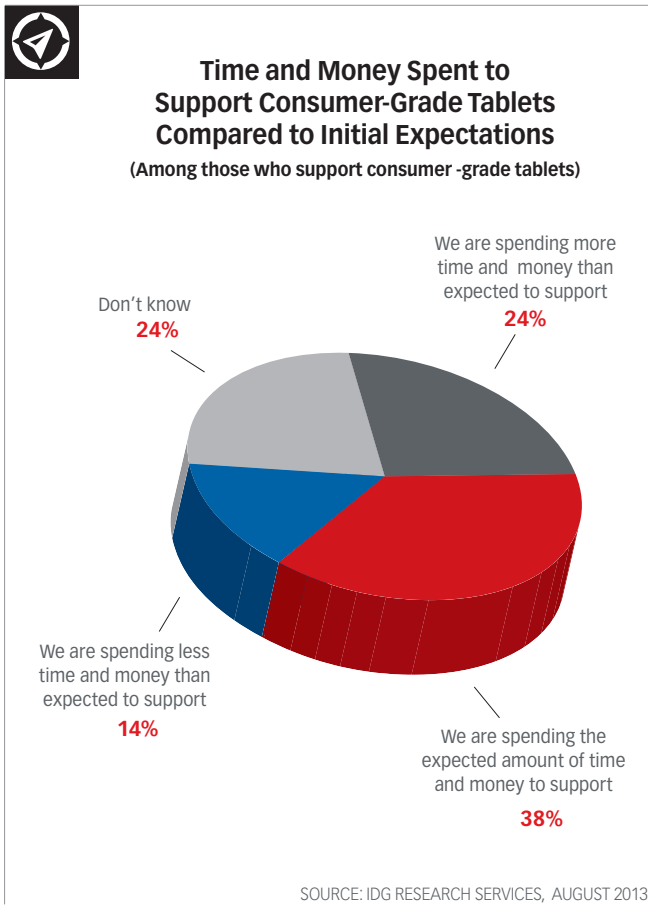
Now that organizations are a couple of years into this newly laid tablet infrastructure, they are starting to bump up against challenges around deployment and support, particularly with the influx of consumer-grade offerings. On average, one-third of the survey respondents report that there are company users solely reliant on tablets as their primary computing device for professional duties. And while nearly half of the survey respondents expect those numbers to climb over the next year, the limited functionality of consumer-grade tablets is hindering more widespread adoption of the platform as a universal PC replacement. Chief among the user complaints about consumer tablets are their lack of a keyboard and mouse, their inability to perform key functions like editing a document and viewing certain file types, and their relatively short battery life—all significant obstacles standing in the way of business users cutting the cord on traditional PCs and making a full transition to a tablet-centric computing platform.

Compounding user hesitation is pushback from IT organizations, which are raising concerns as they run into challenges related to the ongoing maintenance and support of tablets—specifically, the consumer-grade models. Not surprisingly, the top concern related to supporting tablets has to do with security—an issue cited by 70% of respondents. Most consumer-grade tablets lack features like built-in firewalls and virus protection, in addition to version control capabilities for managing software updates. These capabilities, along with additional management functions, are critical for IT to ensure the consistency and security of the corporate network when integrating tablet devices into the enterprise fold.

Next on IT's list of pain points related to tablet deployment is integration with the organization's existing IT infrastructure, cited by 64% of respondents, followed by issues related to mobile device management (60%) and the staff time required to support and manage the influx of tablets (53%).

General unease surrounding tablet support also appears to be more prevalent in companies supporting consumer-grade tablets. In those firms, nearly one-quarter of survey

IN ADDITION TO THE CHALLENGES SURROUNDING THE CARE AND MAINTENANCE OF COMPANY-ISSUED CONSUMER TABLETS, IT ORGANIZATIONS ARE ALSO STRUGGLING UNDER THE WEIGHT OF MAINTAINING DEVICES BROUGHT INTO THE ENTERPRISE VIA BYOD PROGRAMS.



SOURCE: IDG RESEARCH SERVICES, AUGUST 2013

respondents say they are spending more time and money than expected on support, while another 24% are unclear if the time and money committed to supporting the consumer-grade tablets is measuring up to expectations. And consider this: Only 14% of the companies surveyed are confident that they are devoting less-than-expected time and resources to the support and management of consumer-grade tablets.

In addition to the challenges surrounding the care and maintenance of company-issued consumer tablets, IT organizations are also struggling under the weight of maintaining devices brought into the enterprise via BYOD programs. In companies where BYOD is an accepted channel, survey respondents say IT is tasked with supporting those tablets on a case-by-case basis in 65% of instances.

Given that tablets are relative newcomers to the enterprise, there are many lingering uncertainties surrounding what it will take to maintain and support the devices over the long term. While IT organizations have years of experience and mountains of data in PC repair logs, no such maintenance history exists for tablet devices, which is creating uncertainty around the expected frequency of replacement and repairs. Of those survey respondents providing company-issued tablets to users, most say they expect to replace the units about once every two years and perform repairs every few months. Twenty-six percent of survey respondents say they don't know what to expect in terms of a repair schedule, and 35% are unclear about a proper replacement strategy. There are higher levels of uncertainty among those companies issuing consumer-grade tablets exclusively.

What has become increasingly clear, however, is that tablet usage is costing companies time and money. As business users put their own consumer-grade tablets to work as part of a BYOD program, organizations are finding that the devices aren't built to withstand the rigors of professional use. Watching a movie on an iPad while curled up on the living room couch is a very different use case from dragging a tablet device out to a construction site to take photos in inclement weather. When put to use in the field, tablets run a much greater risk of being dropped or getting dirty or wet. This can lead to a host of potential issues that might necessitate a repair or, even worse, a replacement.

Currently, just more than half of the survey respondents report that their companies are actively tracking tablet damage rates using a variety of methods, ranging from rough estimates to detailed, thorough incident reporting. Those keeping track say that approximately 1 in 10 tablets

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owned by the company has sustained damage that warrants a repair or replacement, but that number could be skewed by the fact that companies are still in the early phases of tablet adoption and haven't yet established formal incident tracking programs nor figured out how to track BYOD-related incidents effectively.

The most frequently cited reason for damage to tablets is drops, a problem reported by 64% of respondents. Other common incidents causing damage to tablets are objects falling or crushing devices (34%), spilled liquids (26%), and heat or cold exposure (16%). Twenty-four percent of respondents say their tablets take a beating just due to normal wear and tear. The frequency of these instances underscores the importance of durability and reliability as key requirements when choosing a tablet that is appropriate for long-term enterprise use.

WHAT MAKES A TABLET ENTERPRISE-READY?

While consumer-grade tablets are currently the more prevalent corporate device, enterprise demands may cause organizations to reevaluate their choices and opt for a more robust tablet standard. Tablets architected for entertainment purposes or for basic communications tasks like reading email or dabbling in social media are not necessarily purpose-built to be deployed in an enterprise capacity, particularly when you factor in organizations' expanding requirements around mobile functionality and support for mainstream Windows® productivity tools.

In fact, compatibility with the Windows environment is an important criterion for tablets and one of the primary considerations when evaluating devices. According to the IDG Market Pulse survey, more than two-thirds of respondents consider it at least somewhat important for tablets to fit comfortably in the Windows world, as most perceive those devices to be easier to support and more user-friendly.

Widespread plans among companies to deploy Windows 8 is another factor governing how organizations evaluate existing and future tablet purchases. More than half of the companies surveyed report that they have deployed or plan to roll out Windows 8, which raises the need for some level of compatibility and integration between enterprise applications and hardware.

Many firms see tablets as a way to provide additional functionality and information to customers via specialized apps—a top benefit cited by 30% of respondents. However, that benefit is more likely to be realized with company-issued enterprise-grade tablets, which have stronger security capabilities, better connectivity, more robust management functionality, and better integration into enterprise systems.

Compatibility with existing systems and programs also ranks more highly in importance among companies already deploying enterprise-grade tablets—a 93% rating vs. a 67% rating among other respondents. Once again, this finding underscores a growing desire for professional-grade tablets that will integrate and work reliably with core business systems. Also telling is the list of most important criteria when selecting tablets for enterprise use. Reliability, security, and durability score very high in terms of levels of importance; however, these are all areas of functionality that are less developed with consumer-grade tablets compared with the more robust enterprise devices.

While consumer-grade tablets dominate the enterprise today, there's less certainty about whether they can sustain top billing for long-term business use. In order to become a viable replacement for traditional PCs, tablets must be purpose-built with enterprise functionality in mind while being robust enough to take the bumps and bruises that come with extensive mobile use. Built-in security is also essential, as is integration with mainstream productivity applications and operating environments like Windows. It's a rare IT department that has the time or inclination to hold users' hands through cumbersome processes or help troubleshoot environments that veer from corporate standards.

Devices like Panasonic's enterprise-class Toughpad™ tablets have been architected from the ground up to help professionals be more productive. With an eye toward data and device security, durability, and reliability, the Toughpad family, including the new FZ-G1 running Windows 8 Pro, can give business users the mobile experience they crave without the headaches IT dreads.

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