



tyntec BYOD User Survey

Employees' Choice for Mobility

An International Study of BYOD User Preferences, July 2015



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Introduction

As a result of the enhanced flexibility and real-time interaction mobile technology offers consumers today, employees now expect the same features and functionalities in their work lives as well. The resulting user-initiated phenomenon—known as BYOD—has left businesses hyper-dependent on the backs of employees mobile devices. Gartner even goes so far as to predict nearly half of all businesses will require employees to use their personal device for work by 2017.

As BYOD becomes the new norm, a lag in policy development is adding to difficulties in how to harness the power of BYOD-enabled workforce. Whether it's tightening up security, addressing privacy concerns, keeping up with rapidly advancing mobile technology or adhering to new legal developments, one thing is clear: shifting employee attitudes have made BYOD an agenda topic executive boardrooms around the world must address. While there is no shortage of analysis and debate on the nuances of BYOD programs from a corporate perspective, what about the employees directly affected by these policy changes (or lack thereof)?

With our international BYOD Survey, "Employees' Choice for Mobility," we endeavored to give a voice to the end users who rely on these devices in their personal and professional lives on a daily basis. Thereby pairing user preferences with business requirements for productivity and control.



About the Survey

tyntec conducted the BYOD User Survey with SurveyMonkey collecting data of 1,320 respondents from SurveyMonkey Audience panels in the US, UK and Spain between May 16 and May 22, 2015. The respondents were preselected for their employment status as working at an organization with 500 or more employees, and completed the survey online.

Key Findings & Insights

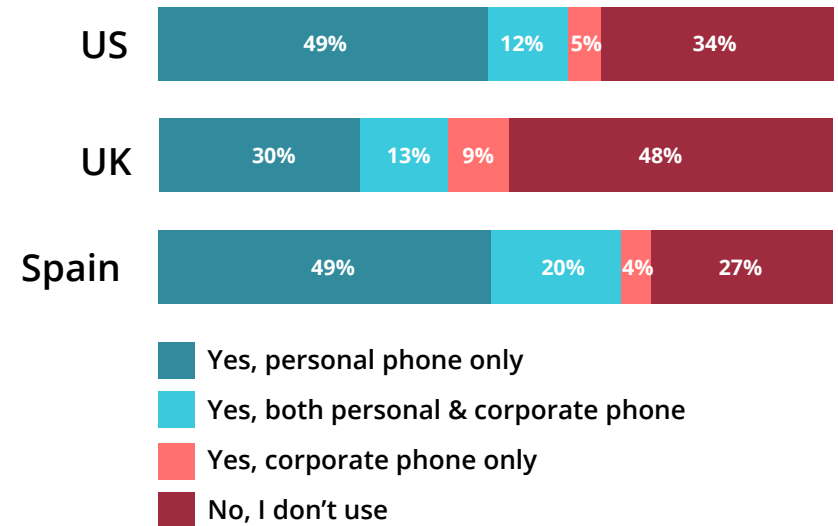
BYOD: THE NEW NORM

Unsurprisingly, the data revealed mobile phone usage is a reality of modern business for most respondents in every market we surveyed. News flash: lots of people use mobile phones. What was interesting was that, formal policies aside, the majority of employees use their personal mobile phone for work-related tasks. Not only that, but it's overwhelmingly common for respondents to continue working on their mobile phone outside of established business hours, reaffirming one of BYOD's unintended consequences: the blurred lines of the normal workday.

Common Practice: Using Personal Phones Professionally

Use of personal mobile phones for work purposes is widespread across the board, with the US (61%) and Spain (69%) showing significantly higher adoption than in the UK (43%).

Q: Do you use a mobile phone for work-related tasks?

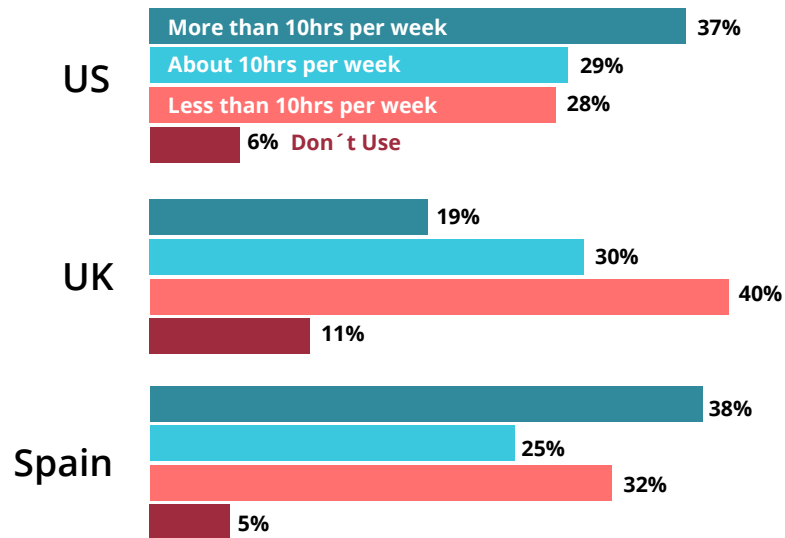


Answered question: 1,320 | US: 503; UK: 407; Spain: 410

Beyond Quitting Time: After-Hour Use on the Rise

Nearly all employees using mobile phones for work continue their use for work-related tasks during non-business hours in the US (94%), UK (89%) and Spain (95%).

Q: How much do you use a mobile phone for work-related tasks outside of office hours in a week?



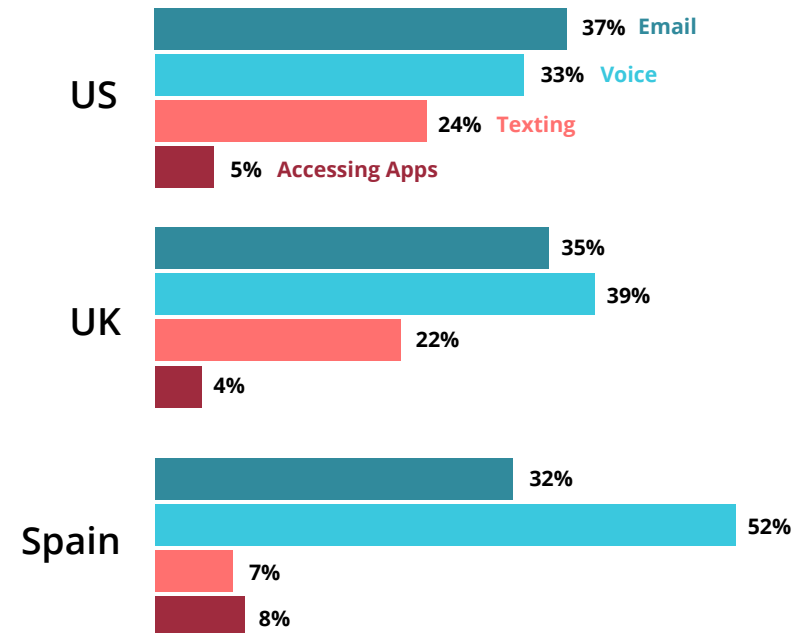
Answered question: 840 | US: 329, UK: 211, Spain: 300

EMPLOYEE HABITS

To help employers gain a better understanding of mobile usage from a granular level, the survey dug deeper into how employees use their phone for day-to-day work interactions. Regardless of the channel, the survey found that BYOD employees in all markets rely heavily on their mobile device for both internal and external communication.

New Device, Familiar Channels

Overall, for work, voice and email were the two dominant mobile function utilized, with texting appearing as the 3rd most popular in the US and UK. In the US, accessing email (37%) is the most commonly used function on a mobile device while voice dominated in Spain (51%) and the UK (38%). Surprisingly, accessing apps fell lower on the list with only 3% of UK employees claiming to access apps for work-related tasks, followed by 5% in the US and 7% in Spain.

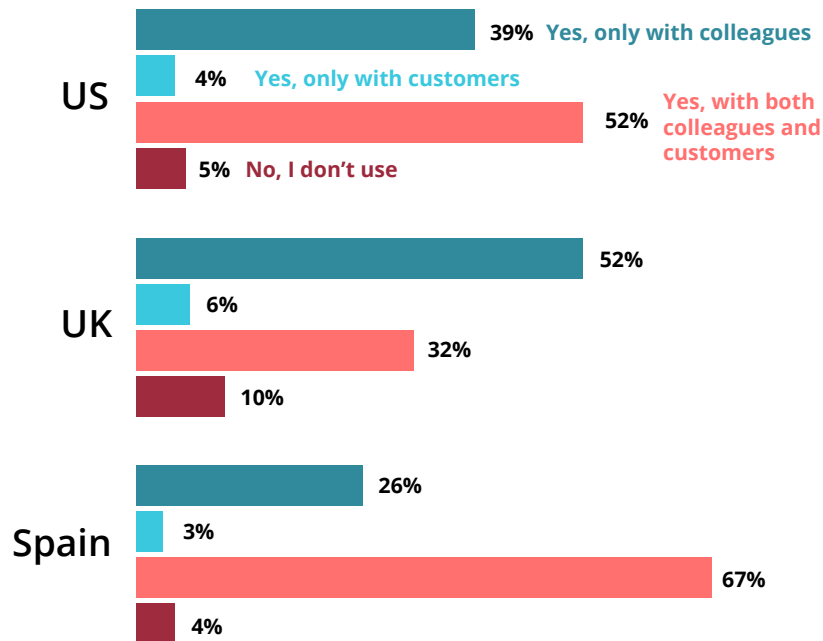


Answered question: 841 | US: 329, UK: 212, Spain: 300

Popular Across All Contacts

The trend is real, BYOD employees in the US (95%), UK (90%) and Spain (96%) overwhelmingly use their personal phones for work-related communication with colleagues and/or customers.

Q: Do you voice-call, text (SMS), IM or video-call your colleagues or customers using your personal mobile phone?



Answered question: 746 | US: 292; UK: 171; Spain: 283

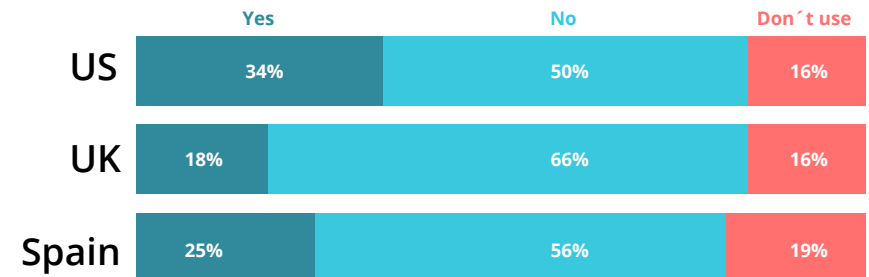
USE-POLICY AND REIMBURSEMENT

The considerable adoption of personal phones in the workplace hasn't done much to compel policy origination. Only a small subset of respondents reported the existence of a formal BYOD policy at work. Furthermore, this disconnect extends to reimbursement practices as survey results indicated companies largely fail to compensate their employees for work-related mobile phone usage. The use-policy gap and reimbursement deficiencies stand in stark contrast to the prevalent use of personal devices at work and set the stage for concerns fleshed out in the survey.

BYOD Policy Deficient Across the Board

Most employers do not implement a BYOD policy, with the US faring slightly better (34%) than its peers in the UK (18%) and Spain (25%).

Q: Does your employer have a Bring-Your-Own-Device (BYOD) policy currently in place?

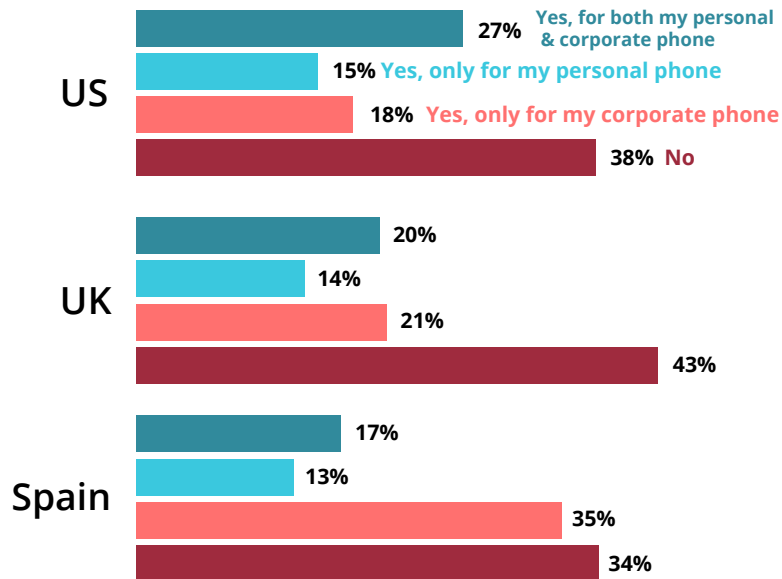


Answered question: 842 | US: 503; UK: 406; Spain: 410

Tangled up in Bills: Unreimbursed Expenses

A substantial number of employees do not receive expense reimbursement for work-related usage on their personal mobile phones in the US (38%), UK (43%) and Spain (34%).

Q: Does your employer reimburse you for work-related mobile usage on your mobile phone (either your personal or corporate mobile phone)?



Answered question: 842 | US: 330; UK: 212; Spain: 300

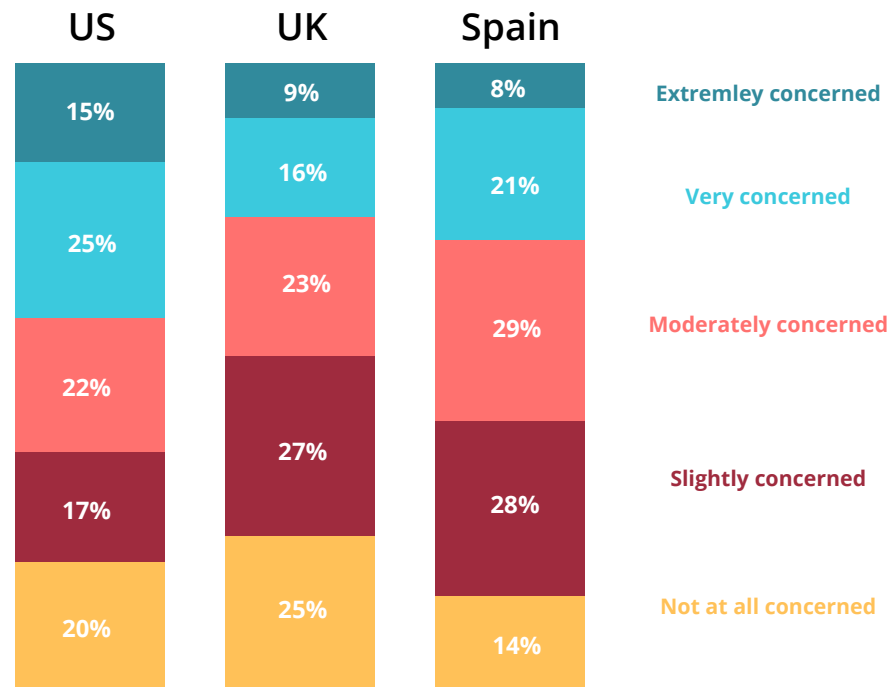
EMPLOYEE CONCERNS

Phones that serve dual purposes—work and personal—have triggered new concerns among employees in BYOD environments. Privacy and reimbursement top the running list of apprehensions, despite the widespread use of personal devices. Specifically, without clear guidelines of employee entitlements in BYOD, there's ambiguity over who's responsible for work-related usage on phone bills. Additionally, employees also tread carefully due to the privacy implications of the fuzzy delineation between work and personal communications.

Privacy Concerns Loom Large—Especially in the US

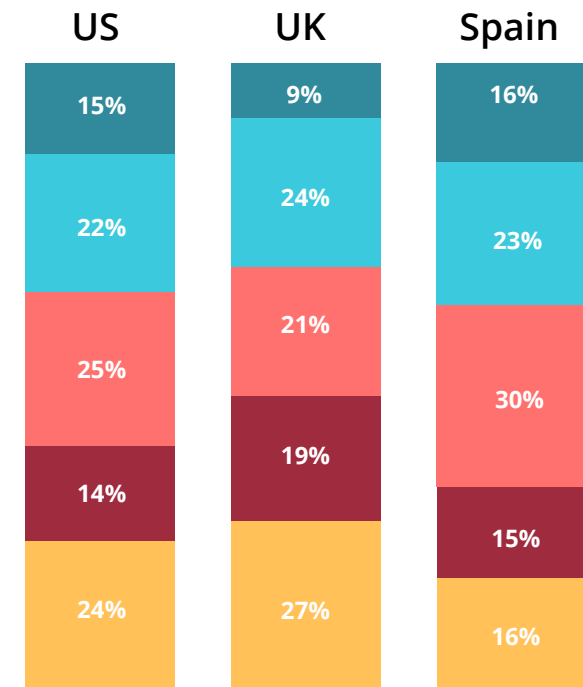
BYOD users are moderately, very or extremely concerned about possible employer access to their private messages—with anxiety higher in the US (62%) than in the UK (48%) and Spain (58%).

Q: How concerned are you about the possibility of having to release both personal and business messages to your employer?



Answered question: : 763 | US: 305, UK: 176, Spain: 282

Q: How concerned are you about having to pay for business usage out of your own pocket?



Answered question: 762 | US: 304; UK: 177; Spain: 281

Reimbursement Worries Run High—Especially in Spain

BYOD users are moderately to extremely apprehensive about paying for business usage on their phone bills in the US (62%), UK (54%) and Spain (69%).

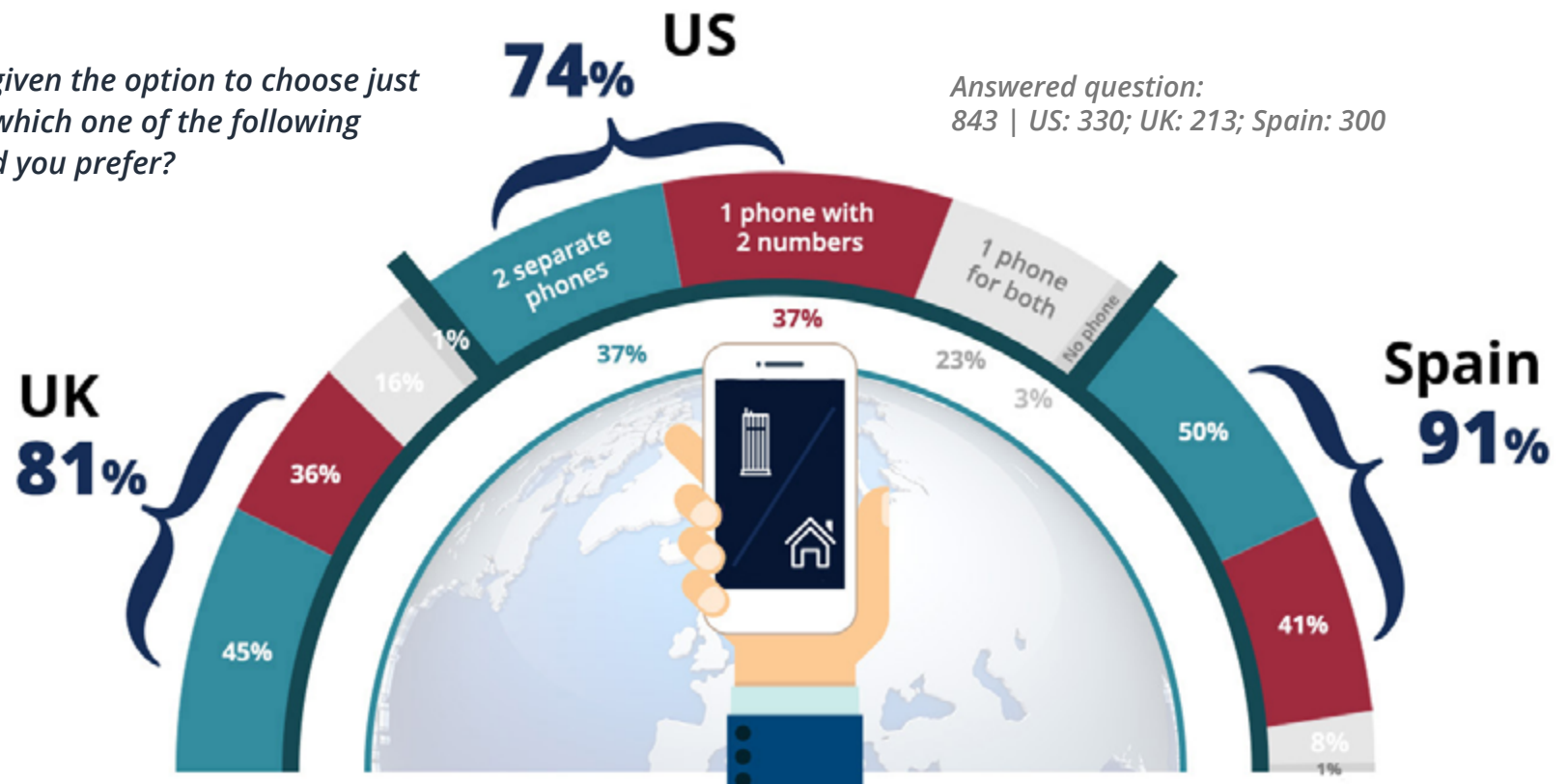
EMPLOYEE PREFERENCES

Despite caution with certain BYOD obscurities, use of personal devices is becoming part of the everyday workflow. Figuring out how to minimize the friction when employees switch between work and personal will require deeper understanding on what BYOD users prefer. Interestingly, of those respondents performing about 50% of work-related tasks with a mobile phone, nearly half showed a strong preference for using one device with two separate phone numbers – for work and personal – to switch between during the course of the workday, instead of the option of carrying two separate devices.

Playing Favorites: Separate Phones/Phone Numbers

Most employees using mobile phones for work would rather have separate phone numbers for work and personal use across the US (74%), UK (81%) and Spain (91%).

Q: If given the option to choose just one, which one of the following would you prefer?

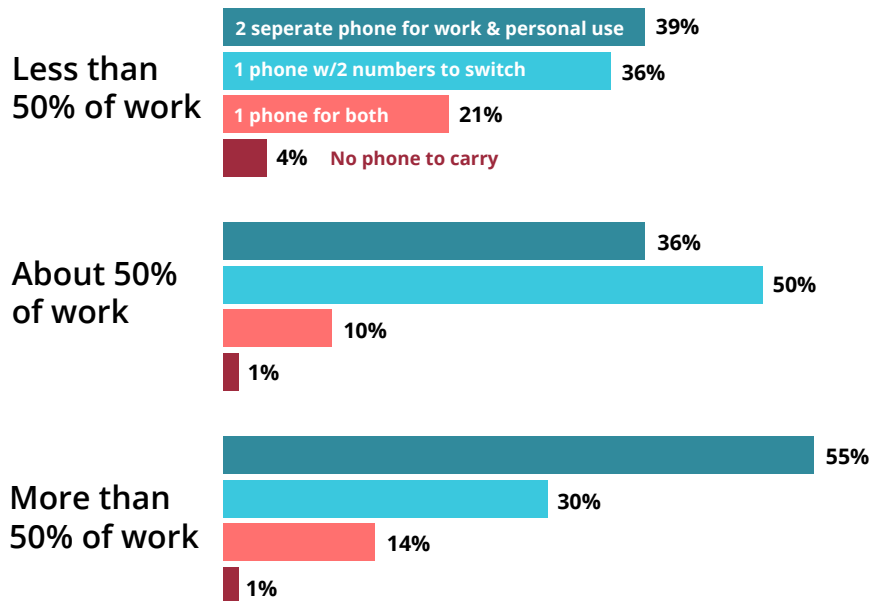


Doubling Up: Accessing 2 Numbers from 1 Phone Gaining Popularity

Half of employees performing about 50% of work-related tasks via mobile phones prefer carrying just 1 phone with 2 numbers to switch between work and personal use instead of carrying 2 separate phones.

Q: How much do you use a mobile phone for work on a daily basis?

Q: If given the option to choose just one, which one of the following would you prefer?



Answered question:

*837 | Use mobile phone for less than 50% of work: 340;
about 50% of work: 253; more than 50% of work: 244*

Implications & Recommendations

Mobile devices are changing the traditional 9-to-5 grind and promoting an 'always on' work culture, where tech-empowered employees dictate when, where and how they want to work. What's important is that employers acknowledge the need to strike the right balance between business benefits with employee preferences to optimize BYOD.

When users say they want separate professional and personal communication channels, their motivation is often avoiding information from one world surreptitiously bleeding into the other. In other words, they seek to remain the arbiters of the public and private aspects of their lives as well as when and how any reclassification may occur.

That's where the right technological solution becomes important. In providing an easy way to alternate between modes, users are empowered with the control necessary to address their concerns. One way to accomplish this is through the integration of virtual mobile numbers that serve as unique identifiers for work-related communications.

By powering corporate phone apps with SMS and voice-enabled virtual numbers, employers can provide the control features that employees want while incorporating all work-related communications into their IT governance. Users simply install and switch to the app to carry out work-related communications—from the same device they elect to use everyday knowing there's a clear separation in communication data, billing and profiles of work and private identities.

When it comes to BYOD use, employees are in the driver's seat. So the sooner employers adapt to employee preferences, the better the odds they can provide the convenience and privacy protection desired by users, while also meeting their IT requirements for productivity and governance.

Survey Demographics

Using SurveyMonkey Audience panels, our May 2015 inquiry yielded over 1,300 respondents across established telecom markets, including the US, UK and Spain. Demographically, respondents split nearly evenly along gender lines—51% women—with the bulk falling in the 25-55 age range and hailing from organizations with a workforce of 500 or more.

BY EMPLOYMENT STATUS

Prescreened for people who are employed at an organization with 500 or more employees.

BY AGE

What is your age?

Answer Options	Response Percent	Response Count
Younger than 25.	3.7%	49
25 – 35	39.8%	526
36 – 45	31.5%	416
46 – 55	24.5%	324
Older than 55.	0.5%	5
<i>answered question 1320</i>		

By COUNTRY

In what country do you currently reside?

Answer Options	Response Percent	Response Count
Spain	31.1%	410
U.K. (United Kingdom)	30.8%	407
U.S.A. (United States of America)	38.1%	503
<i>answered question 1320</i>		

BY GENDER

What is your gender?

Answer Options	Response Percent	Response Count
Male	49.3%	651
Female	50.7%	668
Other	0.0%	0
<i>answered question 1320</i>		

BY INDUSTRY

What industry is your company in?

Answer Options	Response Percent	Response Count
Banking and Financial Services	6.5%	84
Construction, Materials and Natural Resources	5.0%	66
Education	10.1%	134
Energy and Utilities	2.7%	36
Government	11.1%	146
Healthcare	11.1%	146
Information Technology	8.2%	108
Insurance	2.9%	39
Media and Entertainment	1.4%	18
Professional Services	5.1%	68
Retail & Wholesale	12.6%	167
Software Publishing and Internet Services	2.3%	31
Telecommunications	2.9%	38
Transportation	4.5%	59
Other (please specify)	13.6%	180
answered question 1320		

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About tyntec

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