The Landscape of Construction
IT Decision Makers
2018
Introduction

The Landscape of Construction IT Decision Makers Study was conducted independently by CITE Research (www.citeresearch.com) and commissioned by Dropbox among 200 construction IT decision makers (ITDMs), with 100 respondents in the US and 100 respondents in the UK at companies with 250 employees or more between December 12th – December 26th, 2017.

Respondents

- Employed full-time
- Primary/shared decision makers

All work in either the IT department, C-suite department or other senior level department

Capture their perceptions about:

- New Technology
- Purchasing Challenges
- Data Security
- Mobile Workforce
- Cloud Storage
- Regulations
- Industry Trends
4 Major Themes Uncovered

1. **IT decision makers spend significant time researching new technology.**
   - They utilize reviews, news sites and product demonstrations to inform their decisions.
   - Reliability stands out as the most important factor in purchase decisions, while determining compatibility is the biggest challenge.

2. **Mobile workforces are widespread and on the rise.**
   - Remote capabilities lead to happier employees and increased productivity.

3. **Perceptions of cloud storage are positive – with the majority trusting the technology.**
   - ITDMs expect the amount of storage on the cloud to increase, and most who are not yet using it expect to do so in the next year.
   - Security is the top benefit for construction IT decision makers, as well as the top issue for cloud storage.

4. **Data security is the most worrisome issue facing IT decision makers, now and into next year.**
   - They say their organizations would benefit from stronger security measures.
   - They have had security issues with BYOD policies and cloud storage.
   - Security issues are the most common barrier to purchasing cloud storage.
   - Lastly, increasing security is the top priority for 2018 for many.
Evaluating New Technology
Reliability & competitive pricing most important purchase factors

Construction ITDMs believe reliability is of the utmost importance when making a purchase decision – **63% say reliability is extremely important.**
Reviews, tech sites & vendor demos inform ITDMs

ITDMs use **significant time and various resources** to research IT products.

- Those who work in the IT department are more likely to use product reviews (87%) and tech sites (83%).

35% of ITDMs spend 6–10 hrs on new product research.
Determining compatibility & vetting vendors present challenges in purchase process

About a quarter find determining compatibility (24%), getting approval (24%) and/or getting sufficient information (22%) to be extremely challenging.

<table>
<thead>
<tr>
<th>Percentage of ITDMs that consider the following aspects very challenging. (Top 3)</th>
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<tbody>
<tr>
<td>Determining Compatibility                                   24%</td>
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<tr>
<td>Getting Approval                                             24%</td>
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<tr>
<td>Getting Sufficient Information                               22%</td>
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ITDMs find purchase process for new technology to be interesting

While most construction ITDMs say the process of purchasing new technologies is interesting, easy and clear, one-in-three conversely say the process is tedious.

- 71% find the process interesting
- 34% in the US find the process tedious
Data Security & Protection
The majority (80%) of ITDMs in the construction industry have experienced some type of security issue in the last year. 40% have had malware attacks.
Loss of data results from security issues

55\% in the US have lost data from security issues

Loss of data is particularly prevalent among those in the US.
<table>
<thead>
<tr>
<th>Data Security &amp; Protection</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Antivirus Software</td>
<td>64%</td>
</tr>
<tr>
<td>Anti-Spyware Protection</td>
<td>53%</td>
</tr>
<tr>
<td>Require Password Changes Regularly</td>
<td>52%</td>
</tr>
<tr>
<td>Regular Software Updates</td>
<td>50%</td>
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Most are using various methods to protect files & data

Half or more of those in the construction industry are using **antivirus software, anti-spyware protection, password changes and/or regular software updates to keep files safe.**

Most are also using privacy policies and/or certifications.
Construction ITDMs feel their companies are prepared for security issues.

- **82%**
  - My Organization Has a Plan of Action to Recover Lost Data
- **76%**
  - My Organization Has Everything Set Up to Protect Our Data
- **73%**
  - My Organization Has a Plan of Action to Respond to a Security Breach
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The Mobile Workforce
Majority allow remote workers & expect the number to increase

Percentage of organizations that have a mobile workforce.

YES 80%  NO 20%
At least a portion of the workforce is working remotely the majority of the time or part of the time.

More than half (57%) of both US and UK ITDMs say that up to half their workforce works remotely the majority of the time.

Those in the US are significantly more likely to say 1-25% of the workforce is working remotely the majority of the time, while those in the UK are more likely to say 26-50% of their workforce is working remotely the majority of the time.
Use laptops and mobile phones frequently to connect mobile workforce

How organizations mobile workforce stays connected. (Top 5)

- **77%** Laptops
- **72%** Mobile Phones
- **53%** Instant Messaging Software
- **48%** Video – conferencing
- **43%** VPN
The majority of ITDMs in the construction industry in both the UK (71%) and the US (81%) say a remote workforce has a positive impact on company’s productivity.

Those in the US are more likely to say their mobile phone is very important to their own productivity (75%) compared to those in the UK (67%).
Most allow BYOD for phones (65%) and laptops (62%)

Most ITDMs in construction say that their organizations allow phones and laptops, while more than half of UK ITDMs say their organizations allow tablets (significantly more so than in the US).

UK ITDMs are also more likely to say that 26-50% of their organization’s employees are utilizing the BYOD policy.
ITDMs see a variety of benefits from BYOD, such as employee satisfaction & cost savings.

- 51% Cost Savings
- 56% Increased Employee Satisfaction
Yet, BYOD brings about problems with compatibility and data security for some.

Percentage of ITDMs who see the following issues from BYOD policy. (Top 4)

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Compatibility</td>
<td>49%</td>
</tr>
<tr>
<td>Data Security</td>
<td>48%</td>
</tr>
<tr>
<td>Cost Increase</td>
<td>38%</td>
</tr>
<tr>
<td>Compliance Issues</td>
<td>34%</td>
</tr>
</tbody>
</table>
Cloud Perceptions
Cloud storage used by majority of organizations

75%

use cloud storage
Reliability, costs and security issues arise from VPNs or servers

Percentage of organizations that had the following issues with VPN or file server. (Top 4)

- Reliability/Downtime Issues: 45%
- High Costs: 44%
- Security Issues: 43%
- Incompatible with Other Solutions: 34%
The vast majority trust cloud storage when it comes to data security

88%

completely or somewhat trust cloud storage
Use of cloud storage expected to increase in the next year

Most have up to 75% of their company’s data on the cloud. Three-quarters expect this number to increase in the next twelve months.

75% say their use of cloud storage will increase in the next year
Encryption & two-step authentication used to protect cloud storage
Security & flexibility are top benefits of cloud storage

Remote access is seen as a benefit significantly more often among US ITDMs in construction (59%).

59% see remote access as a significant benefit.
However, one in three have experienced security issues
Concerns about reliability (26%) and costs (24%) are most common reasons for not having cloud storage yet.

Most of those who do not use cloud storage intend to do so in the next year.

70% plan to buy cloud storage next year.
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Regulations
Among construction ITDMs, the GDPR is the most common regulation they are required to follow.

The impact of regulations are staying the same or increasing

Change in regulations over the last 3 years.

- 47% Increase
- 46% Stay the Same
- 4% Decrease
Concerns Now & In the Future
Data loss & data security are top concerns facing ITDMs in the construction industry.
Divided on whether data loss or data security is top concern

Approximately equal proportions of construction ITDMs say their top concern is preventing data loss or maintaining data security.

Those in the US are more likely to say data security is the top concern (22%) while those in the UK are more likely to say effectively backing up data is the top concern (15%).

20% say preventing data loss is their top priority

22% say maintaining data security is their top priority
Construction ITDMs are using collaboration platforms more often than other technologies

41% are already using Collaboration Platforms.

Those in the **UK** are significantly more likely to be using Machine Learning – 30% already use it.

Those in the **US** are significantly more likely to say they will **not use AI**, with 14% saying they will not.
Most say budget will increase in the next year

Budget expectations are consistent across countries:

- 74% of those in the US say it will increase, 23% say it will stay the same and 3% say it will decrease.
- 73% of those in the UK say it will increase, 24% say it will stay the same and 3% say it will decrease.
Increasing cybersecurity is the top priority for their department in the next 12 months.

For ITDMs in the UK, investing in skills training is a relatively more important priority, with a quarter (25%) saying this is the top priority.

36% of US ITDMs & 29% of UK ITDMs say that increasing cybersecurity is the top priority.