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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.

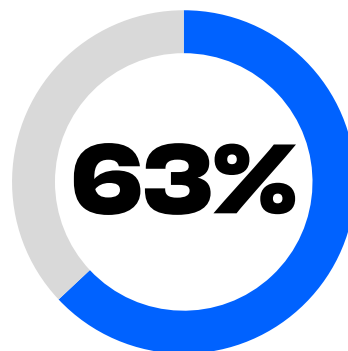
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Evaluating New Technology

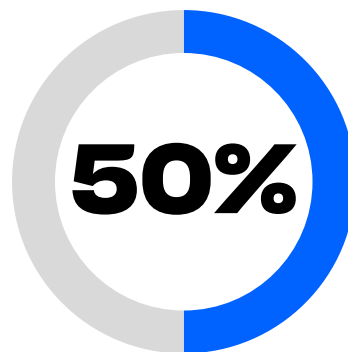
Reliability & competitive pricing most important purchase factors

Construction ITDMs believe reliability is of the utmost importance when making a purchase decision – **63% say reliability is extremely important.**

Most important factors for purchase decisions. (Top 2)



Reliability



Competitive Pricing

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%).

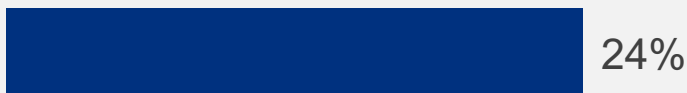


Determining compatibility & vetting vendors present challenges in purchase process

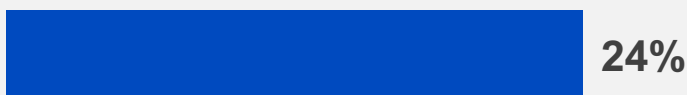
About a quarter find determining compatibility (24%), getting approval (24%) and/or getting sufficient information (22%) to be **extremely challenging**.

Percentage of ITDMs that consider the following aspects very challenging. (Top 3)

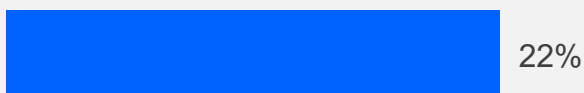
Determining Compatibility



Getting Approval

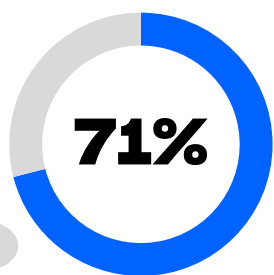


Getting Sufficient Information

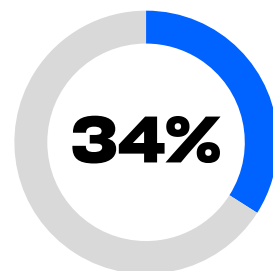
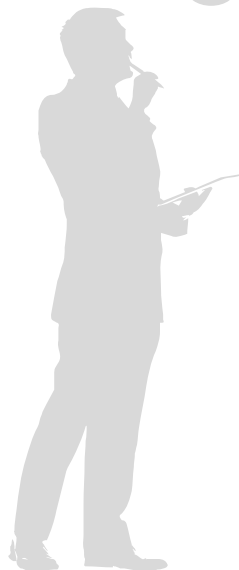


ITDMs find purchase process for new technology to be interesting

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.



find the process interesting



in the US find the process tedious



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Data Security & Protection

The majority have experienced some type of data breach

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.

80% have had experienced some type of security issues





55%

in the US have lost data
from security issues

Loss of data results from security issues

Loss of data is **particularly
prevalent among those in
the US.**

Percentage of organizations that use the following data protection tools. (Top 4)

Antivirus Software

64%

Anti-Spyware Protection

53%

Require Password Changes Regularly

52%

Regular Software Updates

50%

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.



Percentage of ITDMs that feel their organization is prepared to handle security issues. (Top 3)



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

Construction ITDMs feel their companies are prepared for security issues



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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%

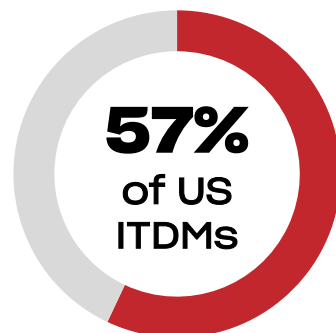


NO 20%

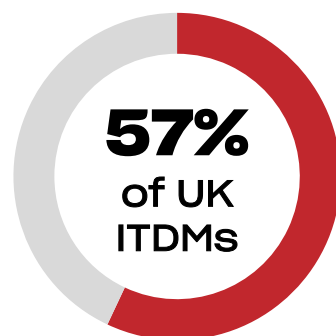
At least a portion of the workforce is working remotely the majority of the time or part of the time

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.



&



say that up to half their workforce works remotely the majority of the time.



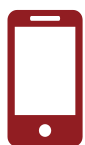
Use laptops and mobile phones frequently to connect mobile workforce

How organizations mobile workforce stays connected. (Top 5)



77%

Laptops



72%

Mobile
Phones



53%

Instant
Messaging
Software



48%

Video –
conferencing

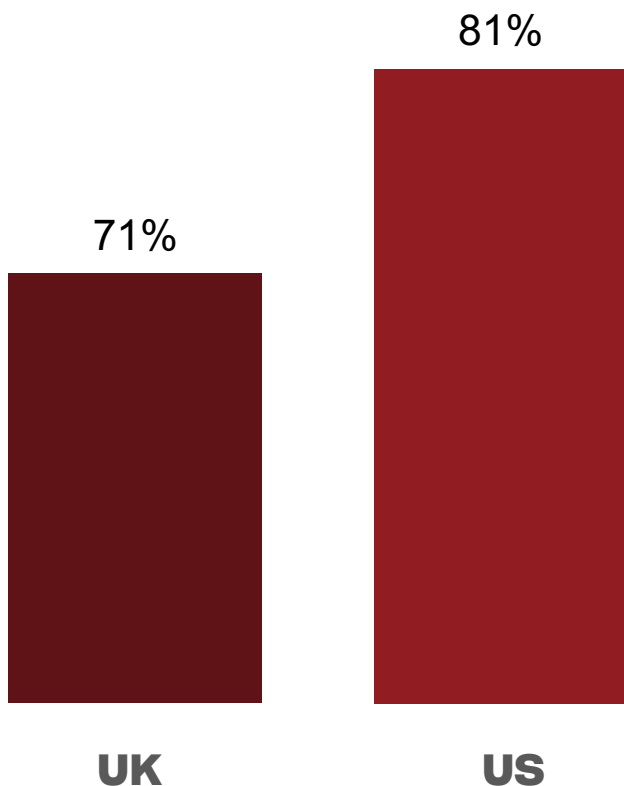


43%

VPN

Remote workforce & ITDMs' mobile device both help productivity

Say working remotely has a positive impact on productivity.



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%).

In the UK **53%**
say that..

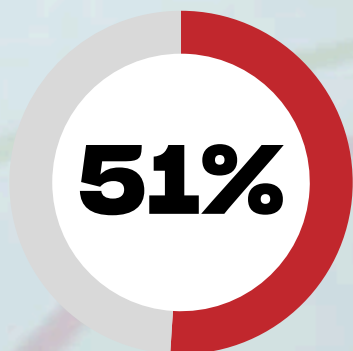
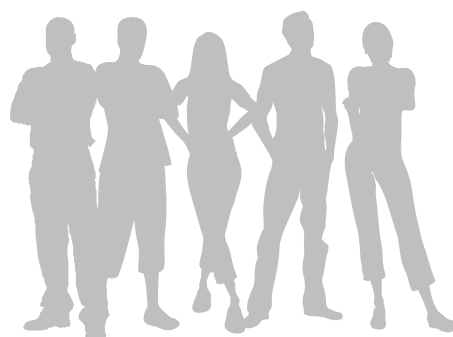
Most allow BYOD for phones (65%) and laptops (62%)

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).

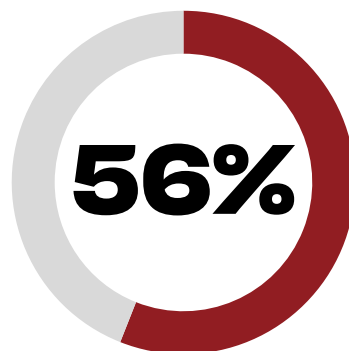
UK ITDMs are also more likely to say that 26-50% of their organization's employees are utilizing the BYOD policy.



ITDMs see a variety of benefits from BYOD, such as employee satisfaction & cost savings



Cost Savings



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)

Compatibility

49%

Data Security

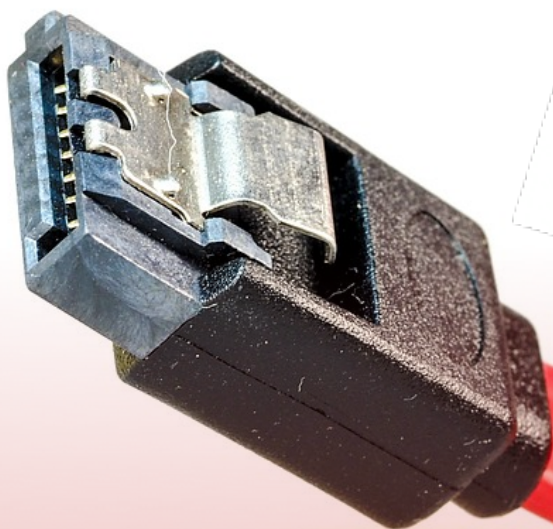
48%

Cost Increase

38%

Compliance Issues

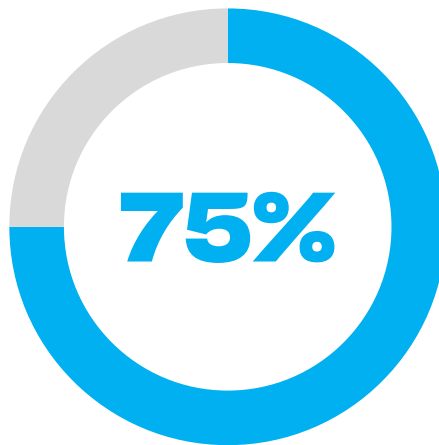
34%



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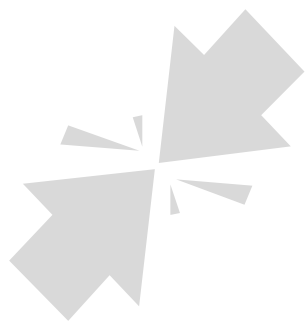
Cloud Perceptions

Cloud storage used by majority of organizations

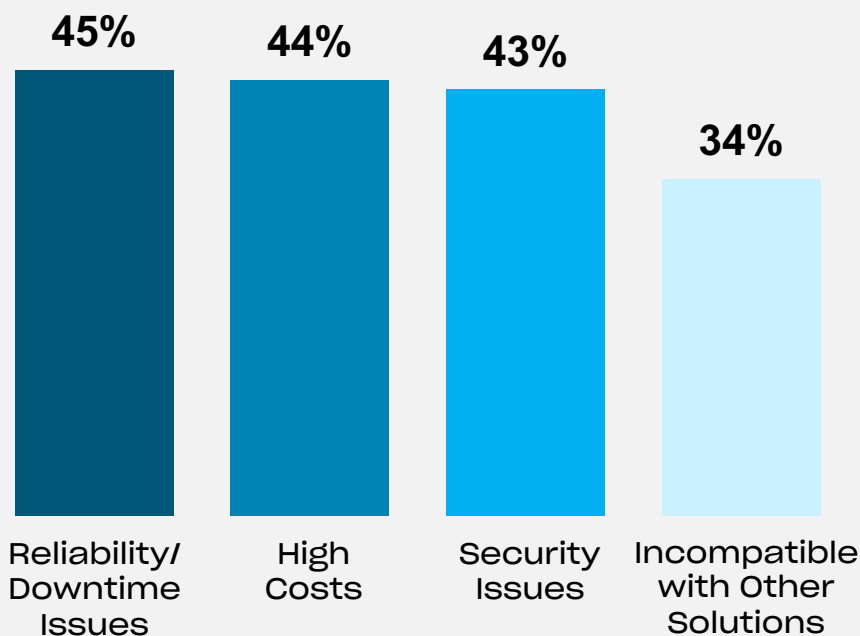


use cloud storage

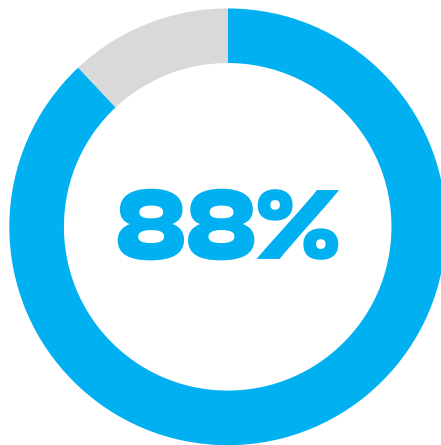
Reliability, costs and security issues arise from VPNs or servers



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



The vast majority trust cloud storage when it comes to data security



completely or somewhat trust cloud storage

Use of cloud storage expected to increase in the next year

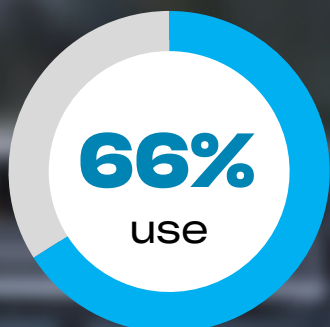
Most have up to 75% of their company's data on the cloud.

Three-quarters expect this number to increase in the next twelve months.

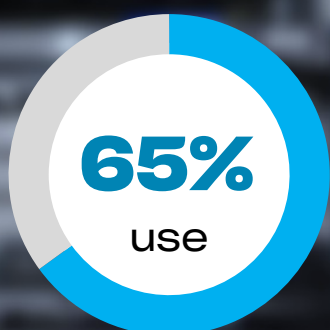
75%

say their use of cloud storage will increase in the next year

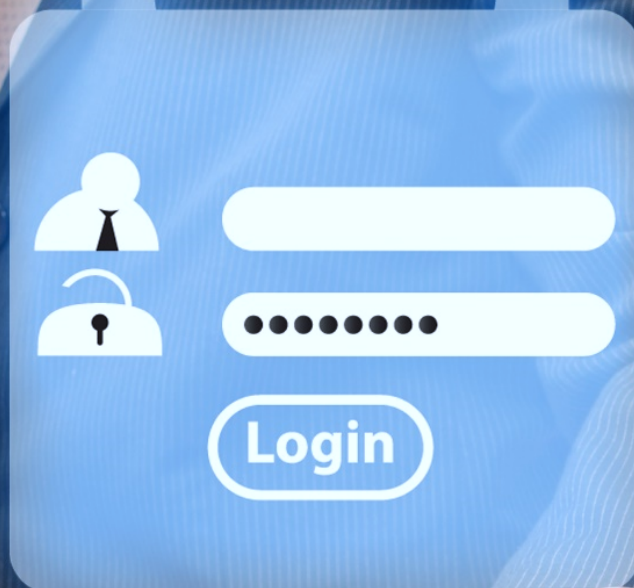
To protect cloud storage...



Encryption



Two-Step
Authentication



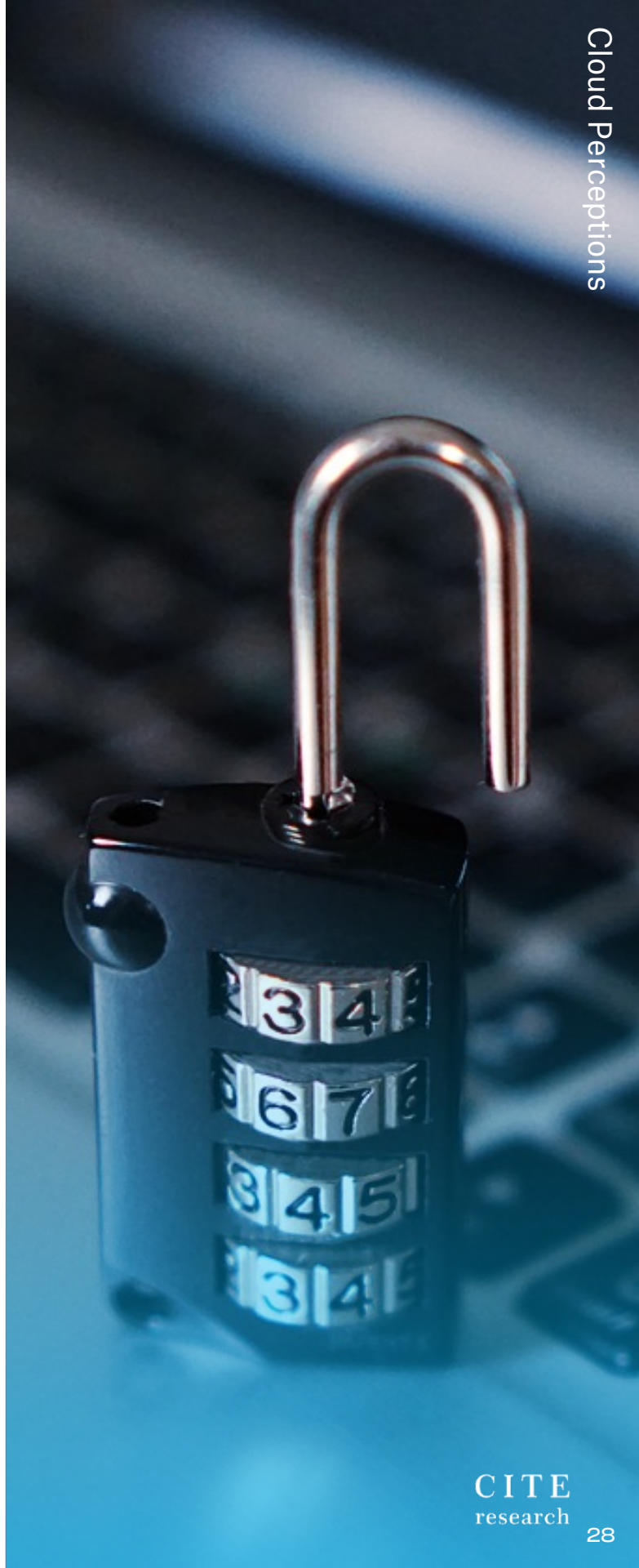
Encryption & two-step authentication used to protect cloud storage

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

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

Concerns about reliability (26%) and costs (24%) are most common reasons for not having cloud storage yet.



plan to buy cloud storage
next year

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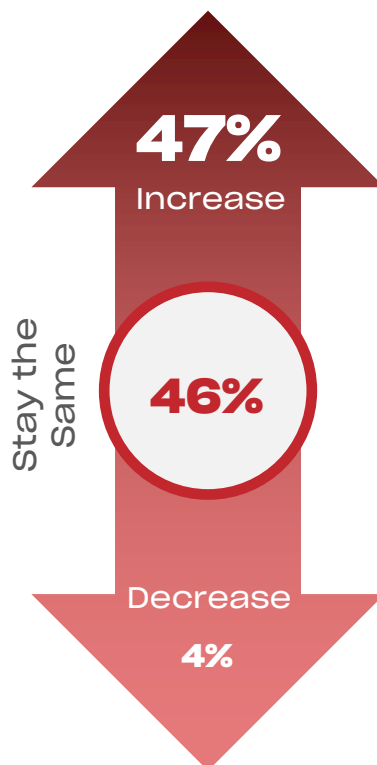
Regulations



The impact of regulations are staying the same or increasing

Among construction ITDMs, **the GDPR is the most common regulation** they are required to follow.

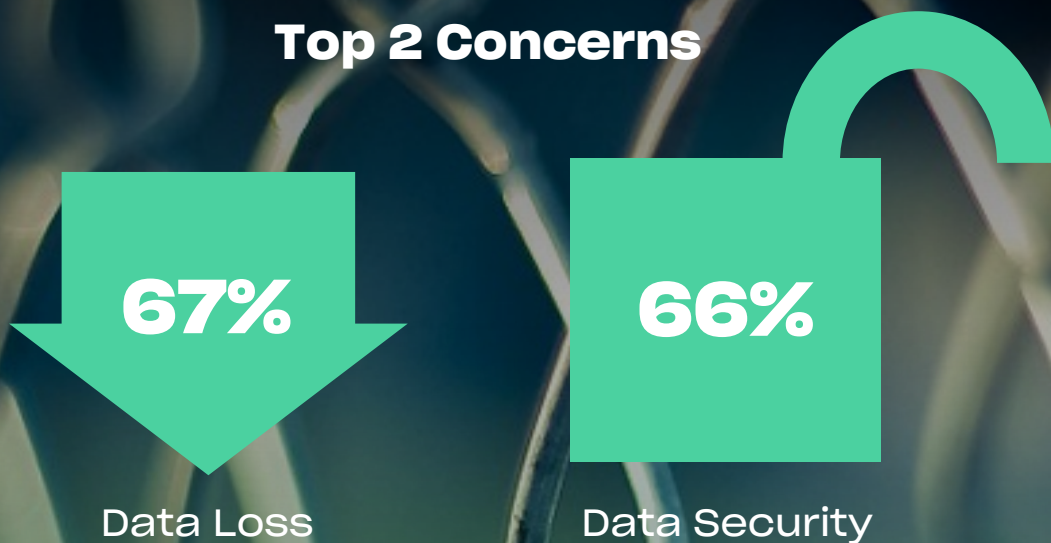
Change in regulations over the last 3 years.



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Concerns Now & In the Future

Top 2 Concerns



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.

41%

are already using
Collaboration
platforms

30%

are
already
using
Machine
Learning

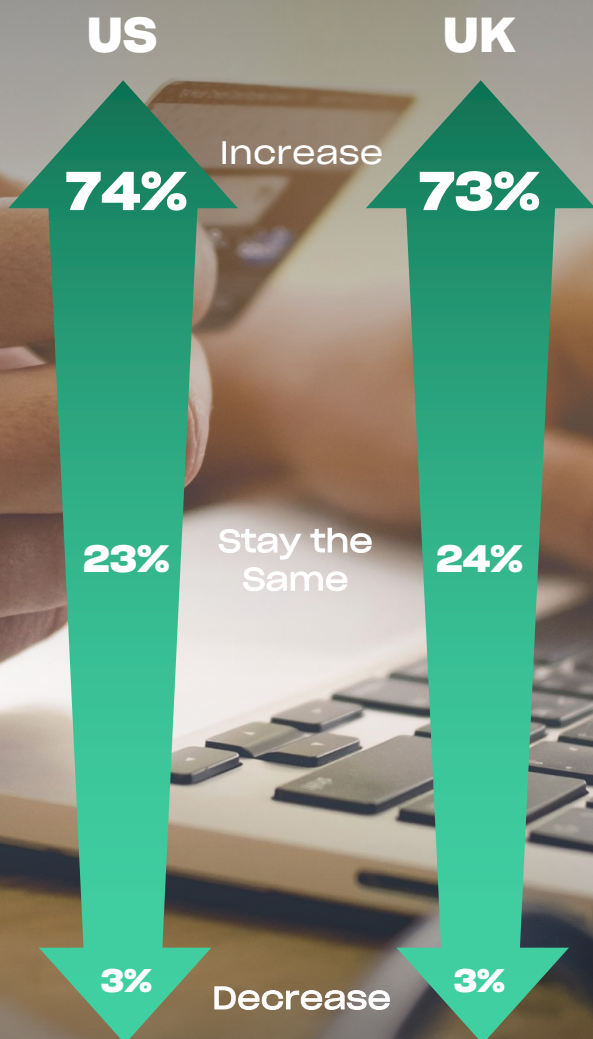


14%

will not
use AI



Budget will...



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.

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