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The Landscape of IT Decision Makers

2018

Introduction

The Landscape of IT Decision Makers Study was conducted independently by CITE Research (www.citeresearch.com) and commissioned by Dropbox among 1,000 IT decision makers (ITDMs), with 500 respondents in the US and 500 respondents in the UK from more than 30 industries 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.
- Flexibility is the top benefit, while security, data migration, and costs are the biggest challenges.

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 is key in purchasing IT products

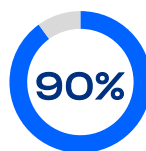
The vast majority of ITMDs - 90% - say that reliability is important in purchasing IT products, closely followed by:

- Competitive pricing (85%)
- Superior customer support (84%)
- Innovation (83%)
- Ease of installation (82%)

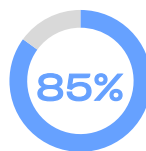
Nearly half of ITMDs rate **all of the following factors as extremely important** when purchasing IT products for their organization:

- Reliability (68%)
- Competitive pricing (50%)
- Superior customer support (50%)
- Innovation (46%)
- Ease of installation (46%)
- Knowledgeable sales representatives (44%)

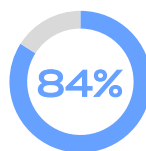
Most important factors for purchase decisions. (Top 5)



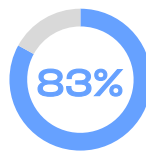
Reliability



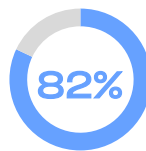
Competitive Pricing



Superior Customer Support



Innovation



Ease of Installation

ITDMs spend significant time and resources researching products

Almost half of ITDMs **spend 11 hours or more researching new products**, utilizing product reviews, tech sites and vendor demos the most.



ITDMs spend significant time and resources researching products

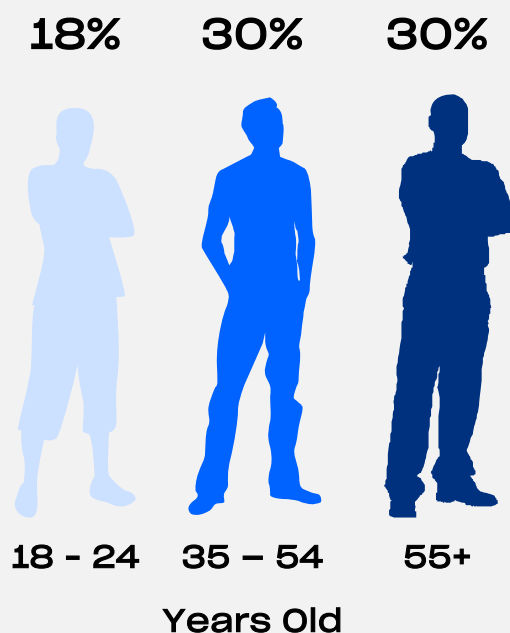
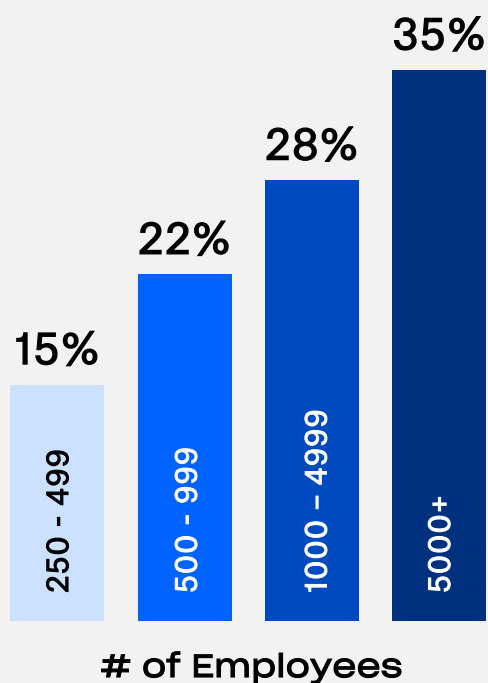
Those at larger companies (500+ employees) are more likely to spend more time researching

- 15% of those at companies with 250-499 employees spend 21+ hours researching
- 22% with 500-999 employees
- 28% with 1,000-4,999 employees
- 35% with 5,000+ employees

Those 35-54 years-old (30%) and 55+ (30%) are more likely to spend 21+ hours researching than their younger counterparts (18% of those 18-24 years-old)



The larger the company and/or the older the respondent the more likely to research 21+ hours.



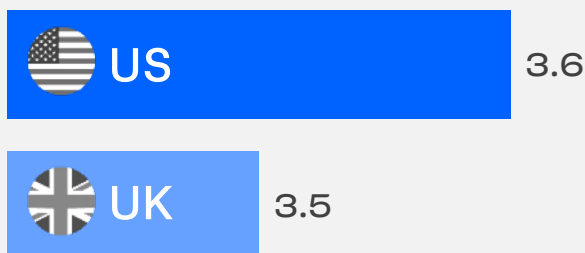
All parts of purchase process create some challenges

ITDMs rate different parts of the purchase process **almost equally challenging**.

Those in the US are significantly more likely to rate vetting new vendors as more difficult than those in the UK (mean rating of 3.6 in the US with 1 being "not at all challenging" and 5 being "extremely challenging" compared to 3.5 in the UK).

Challenging parts of purchase process

Vetting new vendors and/or products



Determining compatibility with current products

Getting approval across departments

Getting sufficient information from vendors

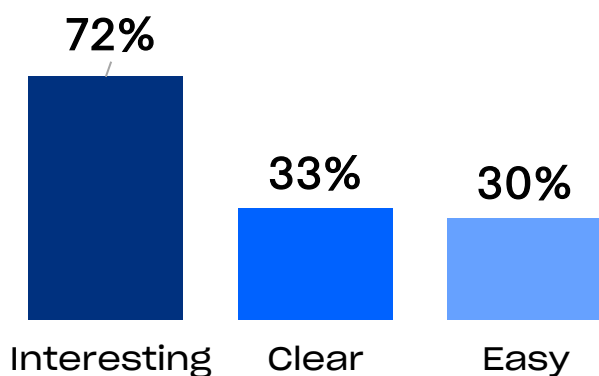
Researching a product

Getting support from my superiors

Engaging with product sales representatives

Most find process of purchasing new technologies to be interesting

Have mixed feelings about the process.

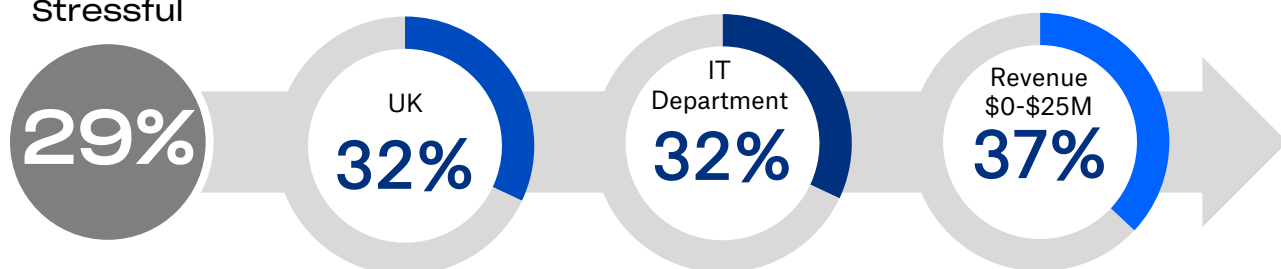


ITDMs appear to **have mixed feelings about the purchase process** for new and emerging technologies. The majority (72%) say it is interesting, and approximately a third say it is clear (33%) and easy (30%).

Conversely, **about a third (29%) also find the process to be stressful.**

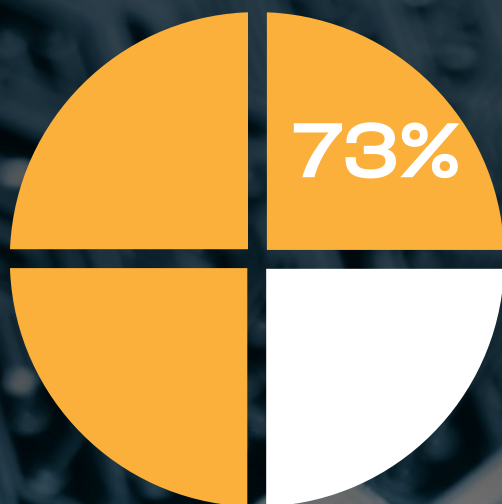
- The groups most likely to find this process stressful:
 - In the UK (32%)
 - Those who work in the IT department rather than C-suite decision makers (32%)
 - Companies with revenues of \$0-\$25M (37%)

Find the Process Stressful



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Data Security & Protection



of ITDMs have experienced some type of security issue



30% in the US say they have not had a security issue

significantly more than those in the UK



24% in the UK say they have not had a security issue

The majority of ITDMs have faced some type of security issue this year

Approximately **three-quarters (73%)** of ITDMs have experienced some type of security issue – although those in the US are significantly more likely to say they have not (30% in the US have not, compared to 24% in the UK).

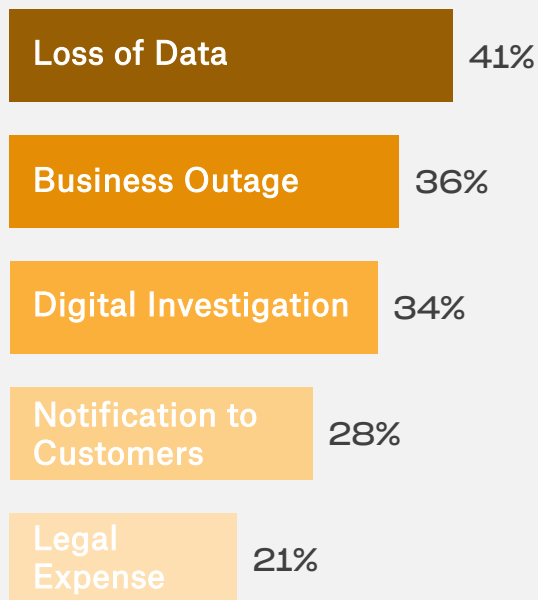
- Those in the US are also more unlikely to use a security re-seller (56% compared to 48% in the UK).

Data loss is the most common result of security issues

Loss of data (41%), business outages (36%) and a digital investigation (34%) are the most common results from a security issue.

- Loss of data is particularly common in the US (45% compared to 37% in the UK have experienced this).

Percentage of organizations that had the following results from security issue(s). (Top 5)



Privacy policies & antivirus software are top security measures

While **antivirus software** is the top way ITDMs protect company files across regions (66%), **those in the US (72%) are significantly more likely to use it than those in the UK (61%).**

- In the UK, ITDMs are more commonly using whole disk encryption (36%) compared to the US (25%).

Those in the **US are also more likely to use privacy certifications (64%)** to protect company data than those in the UK (57%).



72%

more likely to use antivirus software

64%

more likely to use privacy certifications



61%

likely to use antivirus software

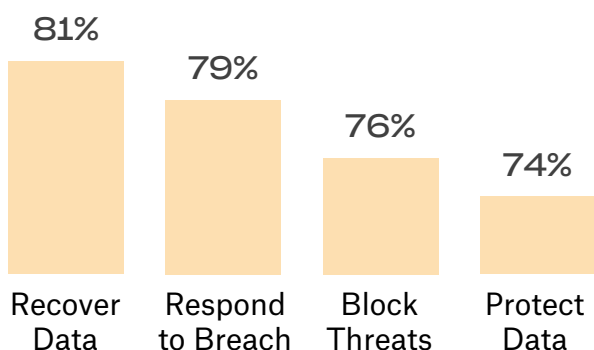
57%

likely to use privacy certifications

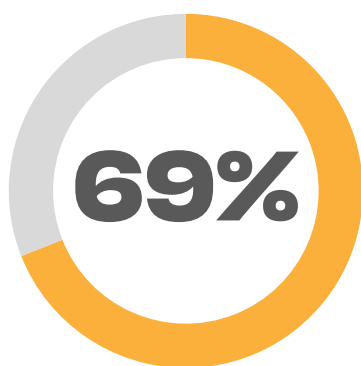




Feel their organization is prepared to:



HOWEVER



say their company would benefit from stronger security measures.

While confident in security practices, ITDMs still want stronger security measures

Interestingly, the **majority of ITDMs feel that their organization is prepared to**

- Recover data (81%)
- Respond to a breach (79%)
- Block threats (76%)
- Protect data (74%)

Yet, 69% also say their company **would benefit from stronger security measures.**

- This is particularly true amongst US respondents (73% in the US compared to 64% in the UK).

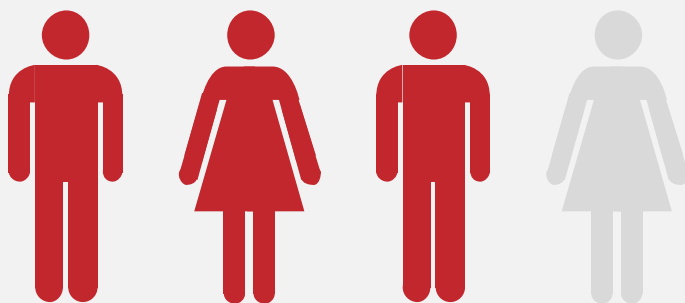
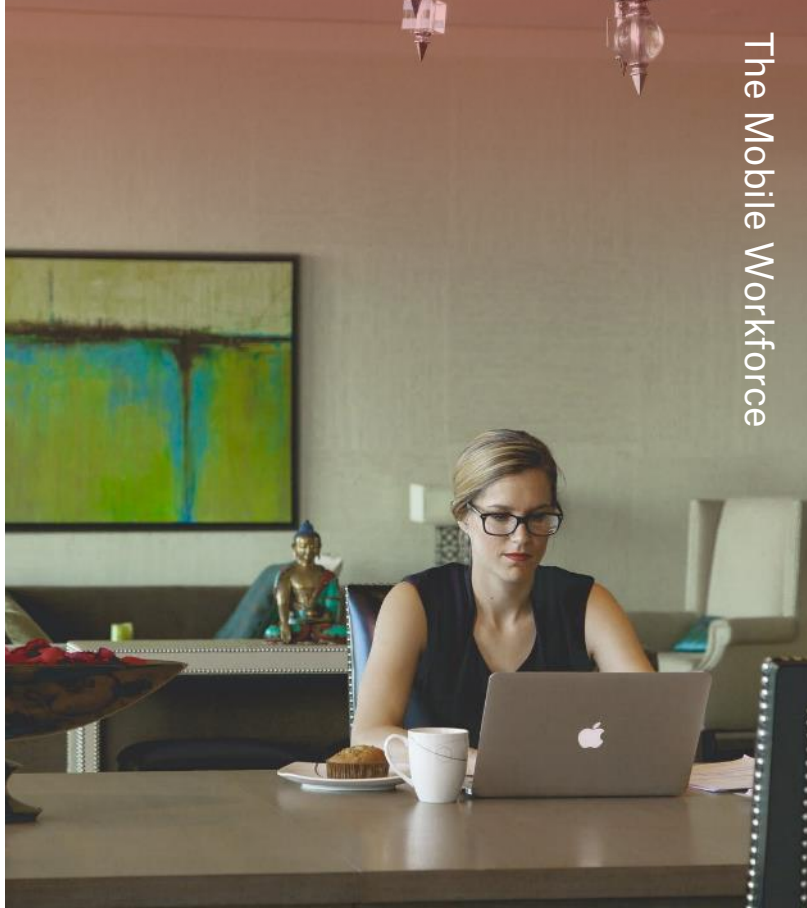
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The Mobile Workforce

A mobile workforce is commonplace and expected to rise

Three-quarters of ITDMs work at companies with a mobile workforce (75% in the US and 74% in the UK). Furthermore, over sixty percent believe the number of employees working remotely will increase in the next year.

- Larger companies with 5000+ employees (81%), and those with revenues over \$1.1B (85%) are most likely to have a remote workforce.

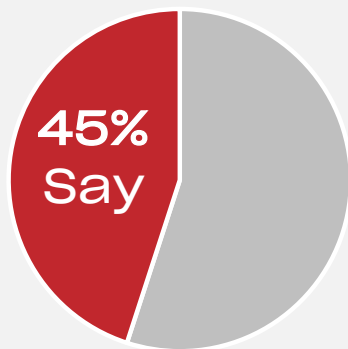


74% - 75%

of ITDMs work at
companies with a mobile
workforce

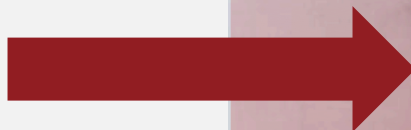
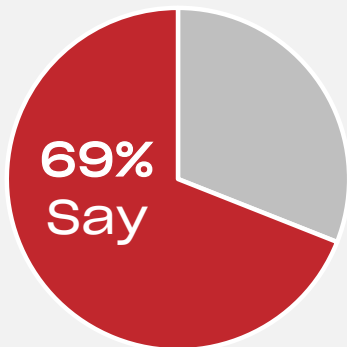
While portions of organizations utilize remote capabilities, fully remote organizations are rare

Almost half (45%) of ITDMs say that 25% or less of their employees work remotely the majority of the time, and two-thirds (69%) say that 50% or less of their employees work remotely one day a week.



25%

or less of their employees work remotely the majority of the time

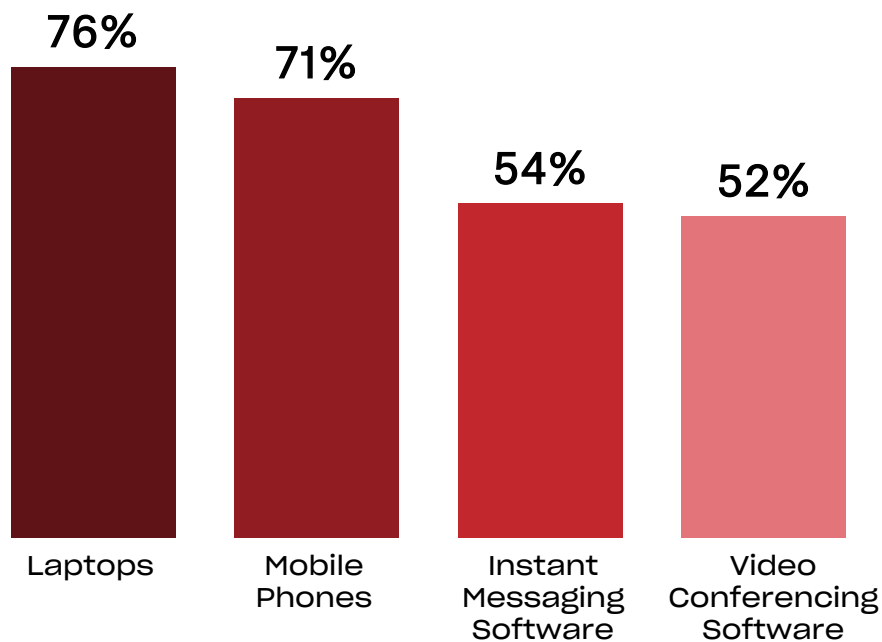


50%

or less of their employees work remotely one day a week

Laptops & phones keep mobile workforce connected

*Top ways organizations mobile workforce stays connected.
(Top 4)*

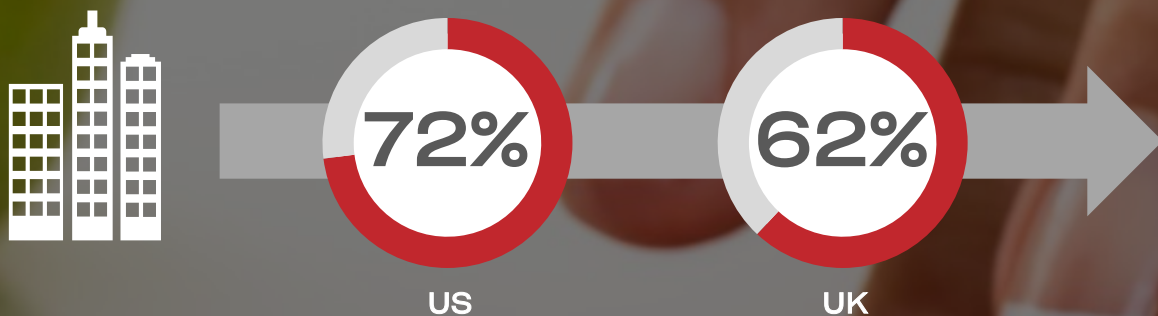


The focus on tools for the mobile workforce seem to be for **communications over file storage**. The majority of organizations use:

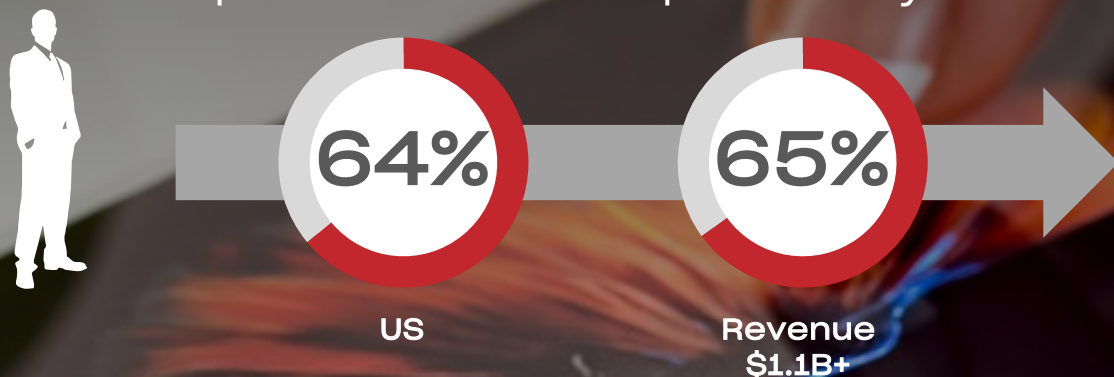
- Laptops (76%)
- Phones (71%)
- Messaging (54%)
- Videoconferencing software (52%)

Those in the **UK are more likely to use cloud-based solutions (39%) to keep the workforce connected** than those in the US (33%).

67% of ITDMs say mobile workforce increases company productivity overall:



64% of ITDMs say their mobile device is important to their own productivity:



Perceived increase in productivity from having mobile capabilities

Most ITDMs (67%) across regions say the **mobile workforce increases company productivity overall**. Those in the US (72%) are significantly more likely to say so than those in the UK (62%).

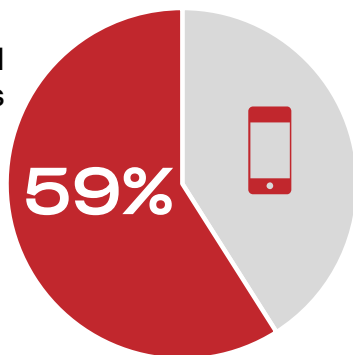
Most (64%) also say that **their mobile device is important to their own productivity**, with those in the US (64%) and those at companies with revenues \$1.1B+ (65%) especially likely to say it is very important.

BYOD policy frequently allowed for phones

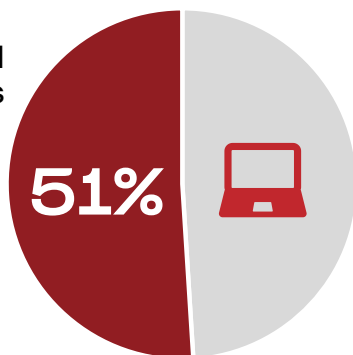
More than half (59%) of organizations allow for employees to use their **own phones** to access privileged information, while **half (51%) allow personal laptops** to do so. Most commonly ITDMs say that 26-50% of their employees utilize the BYOD policy (72% of ITDMs estimate between 26-50% of their employees utilize the BYOD policy).

- Organizations in the US more frequently allow phones (63%) than those in the UK (55%), while those in the UK more frequently allow tablets (43%) than those in the US (36%).
- Those at companies with 5000+ employees (17%) and those in the US (14%) are more likely to say over 75% of their employees use the BYOD policy.

Allow Personal Cellphones



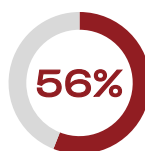
Allow Personal Laptops



Employee satisfaction is key benefit to BYOD policy

Increased employee satisfaction, cost savings and/or productivity gains are top advantages from a BYOD policy.

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



Increased Employee Satisfaction



Cost Savings



Productivity Gains



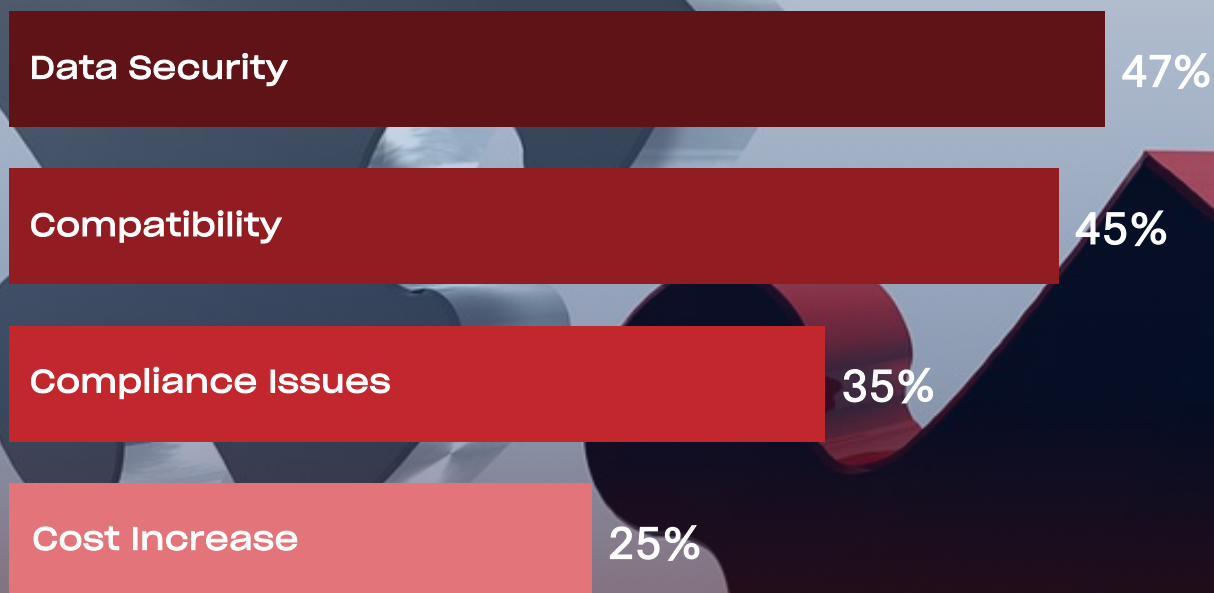
Attracting New Hires

Security & compatibility are top issues that come with BYOD policy

Almost half of ITDMs say they have faced issues with data security and compatibility with their BYOD policy. Approximately a third have had compliance issues.

- Cost increases are a significantly larger issue in the UK (28%) than the US (22%).

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



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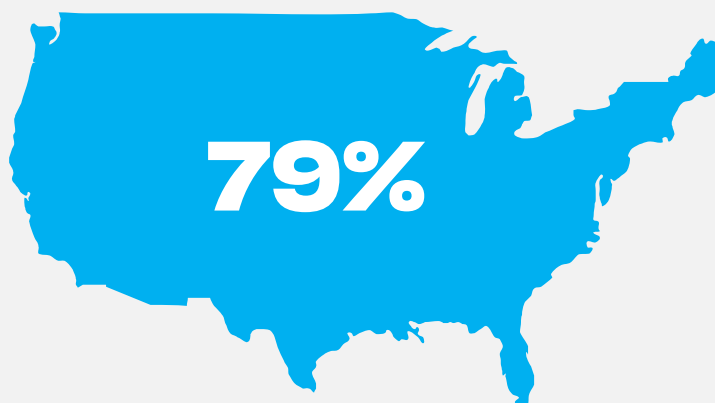
Cloud Perceptions



Majority of ITDMs use cloud storage

Cloud storage is used significantly more by those in the US (79% compared to 72% in the UK).

Furthermore, those at companies with revenues \$250.1M-\$1B (81%) and those at companies with revenues \$1.1B+ (81%) **use cloud storage significantly more.**



\$250.1M –
\$1B



\$1.1B+

Most have some sort of issue with their VPN or server

Over a third of ITDMs have experienced reliability (37%) and/or security issues (34%) with their VPN or server. Almost as many complain of:

- High costs (30%)
- Complex Implementation (29%)
- Incapability problems (27%)

Around one third of ITDMs have experienced...



37%

Reliability
Issues



34%

Security
Issues



30%

High Costs



29%

Complex
Implementation



27%

Incompatible
with Other
Solutions

More likely to completely trust cloud storage

39%

C-suite/non-IT
department
respondents

37%

US

30%

UK

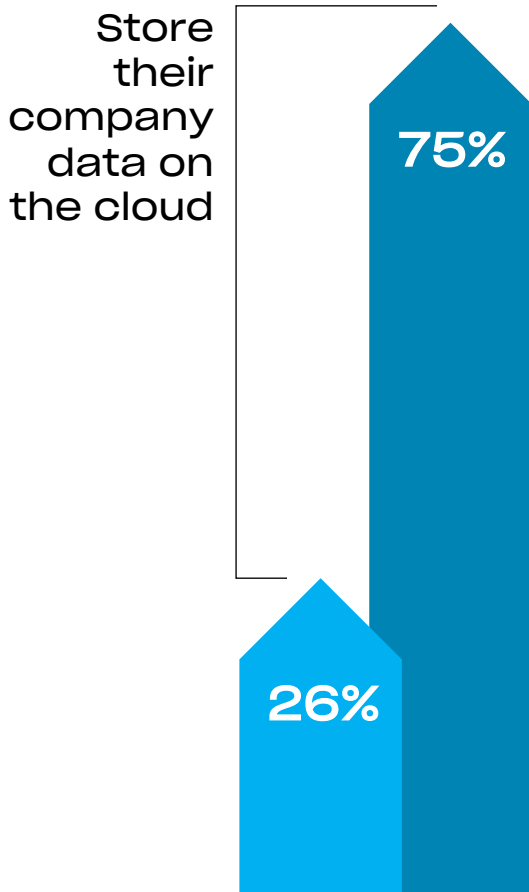
Most trust cloud storage when it comes to data security

Those who are **most likely to completely trust cloud storage include:** C-suite/non-IT department respondent decision makers (39%), and those in the US (37% vs. 30% in the UK).

Cloud storage usage expected to increase in the next year

Most ITDMs (79%) say their organizations are **storing between 26% and 75% of their company data on the cloud.**

The majority – 71% – say this amount will increase over the next 12 months.



Encryption, two-step authentication, & automated updates protect cloud storage

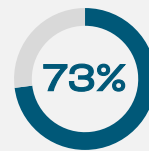
ITDMs are **most commonly using encryption** to protect data on the cloud.

- Two-step authentication and automated updates are used by over half of respondents as well.

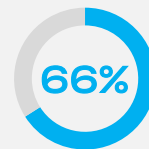
In the UK, sharing controls (40%) are used more often than in the US (28%).



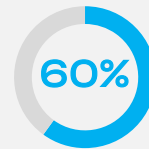
Percentage of organizations that use the following cloud storage security features. (Top 5)



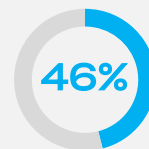
Encryption



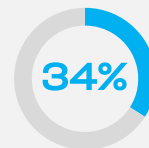
Two-step Authentication



Automated Updates



Mobile Passcode



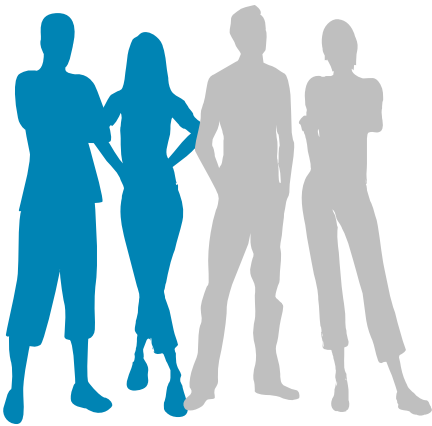
Sharing Controls

ITDMs find various benefits from cloud storage

Flexibility is the most selected benefit of cloud storage, followed closely by remote access and security.

- Those who **work in the IT-department are significantly more likely to say this is a benefit** compared to C-suite decision makers (66% vs. 58%).

Percentage of ITDMs that say these features are the top benefits of cloud storage. (Top 5)



50%

choose every aspect listed to be a benefit of cloud storage

Flexibility 63%

Remote Access 54%

Security 53%

Disaster Recovery 48%

Collaboration Ability 45%

Security issues, data migration & costs are top issues with cloud storage

Cloud storage **issues are less prevalent than benefits**. About a quarter say they have:

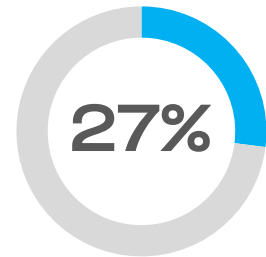
- Security issues (27%)
- Data migration difficulty (26%)
- High costs (23%)

Those in the **US are more likely to say they have no issues** (21% vs. 15% in the UK).

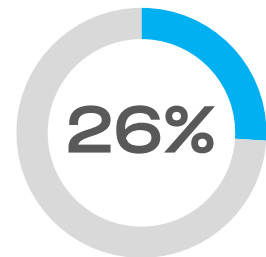
Two-thirds of ITDMs (64%) **who do not currently use cloud storage plan to begin doing so in the next year**.

About a quarter of ITDMs who do not use cloud storage yet say that security issues (30%) and/or high costs (23%) are the reasons their organization has not used cloud storage.

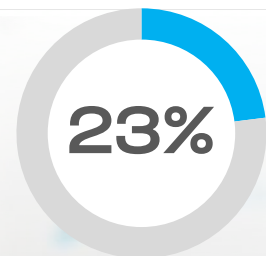
About one forth say they have had...



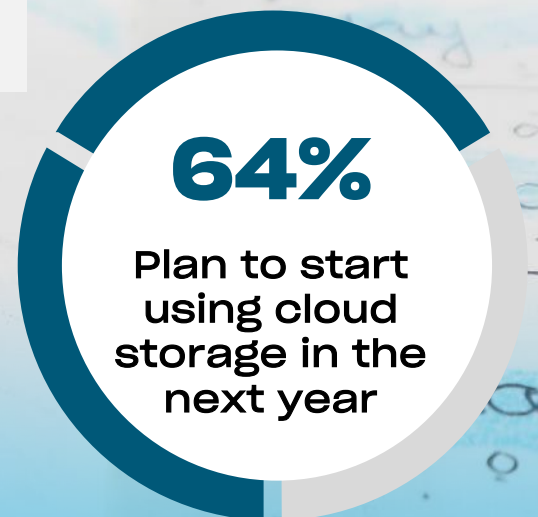
Security Issues



Data Migration Difficulty



High Costs

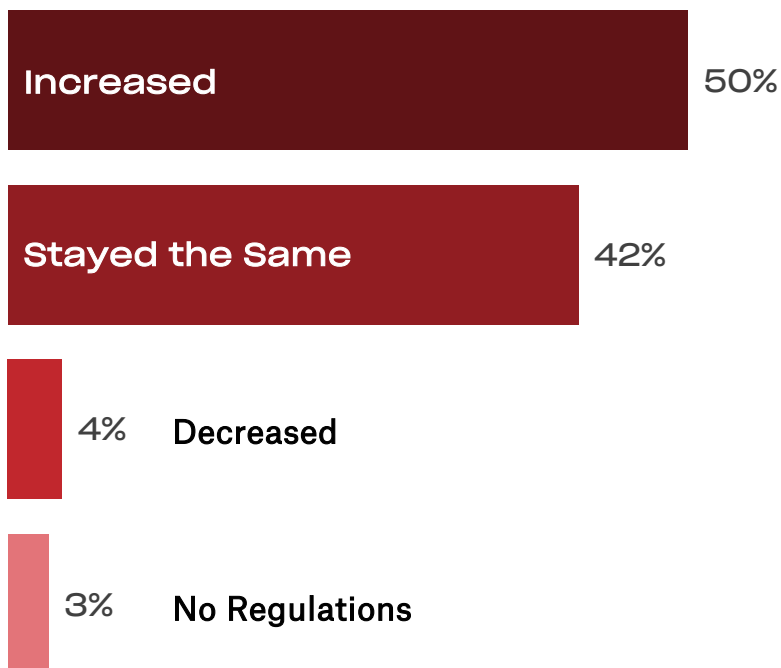


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Regulations

Regulations have increased for many ITDMs

Change in regulations over the last 3 years.



UK ITDMs are particularly likely to say they have faced an increase in regulations (56% vs. 45% in the US), and more often feel the impact of GDPR (60% vs. 50% in the US).

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Concerns Now & In the Future

Keeping data safe & secure is of utmost concern

Maintaining data security (69% say this is very or somewhat concerning) and preventing data loss (67%) are the top two concerns for ITDMs.

A third of respondents (30%) say that **maintaining data security is their top concern.**

This is especially worrisome for:

- US ITDMs (34%)
- IT department employees (33%)
- Those who work at companies with 1,000-4,999 employees (37%)
- Those 35-54 years-old (32%) or 55+ (46%)

Top two concerns for ITDMs...



69%

Say
Maintaining
Data Security



67%

Say
Preventing
Data Loss

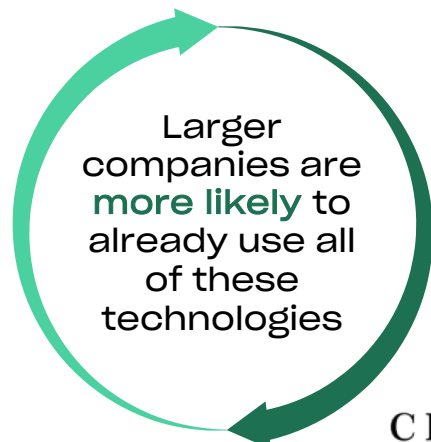
Collaboration platforms are used more often currently than Machine Learning & AI

About a quarter of ITDM's organizations currently use **Machine Learning (26%) and AI (22%), while 38% use collaboration platforms.**

Larger companies are more likely to already use all of these technologies: companies with 1,000 employees or more and/or companies with revenues \$250.1M+ are significantly more likely to use these.



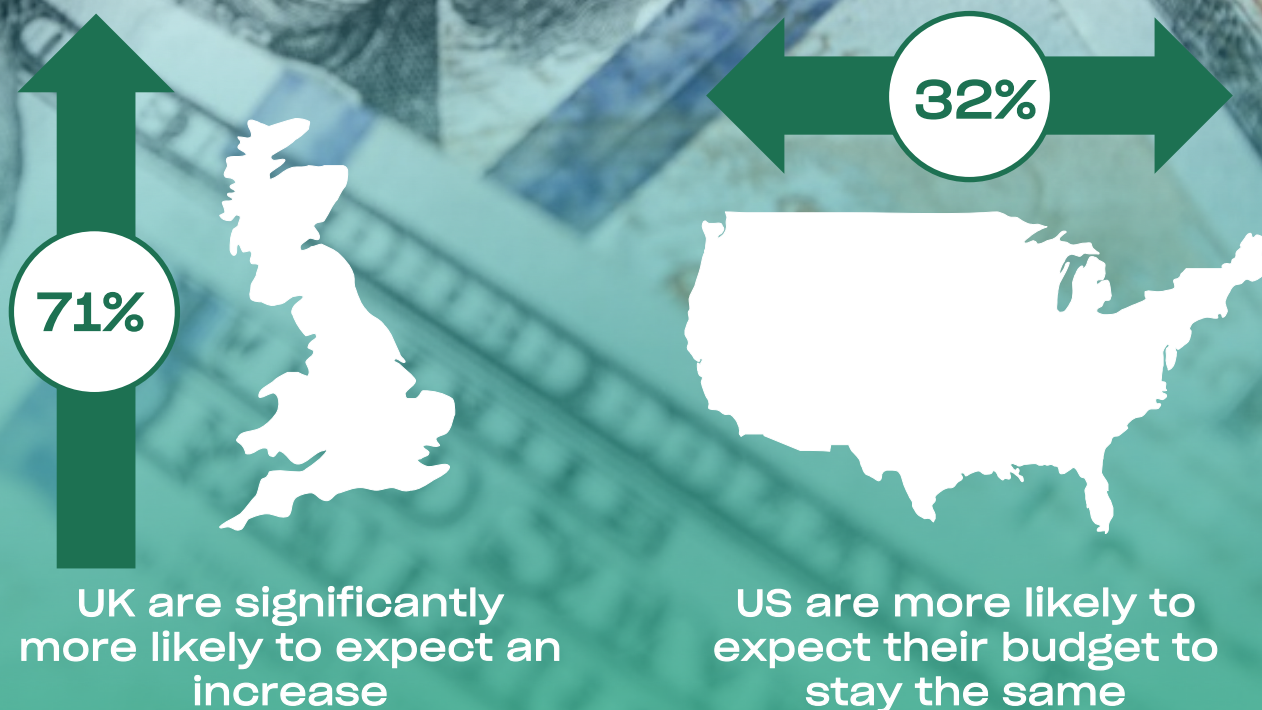
Four in ten organizations use collaboration platforms.



Most expect their budget to increase next year

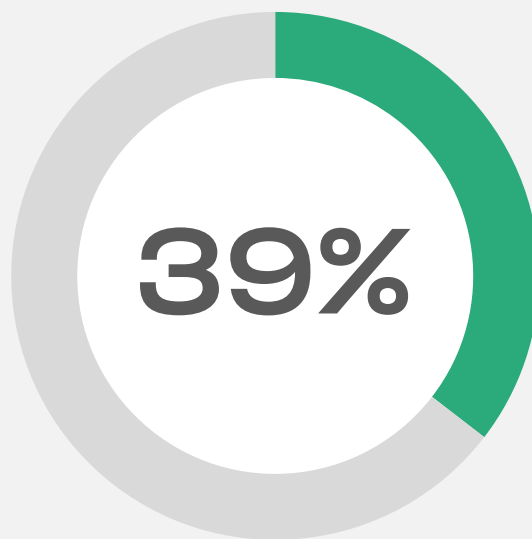
Overall, most expect their budget to increase. Those in the **UK are significantly more likely to expect an increase** (71% vs. 64% in the US), while those in the **US are more likely to expect their budget to stay the same** (32% vs. 23% in the UK).

Companies with revenues \$250.1M-\$1B also expect to see an increase more often (74%).



Increasing cybersecurity should be priority in 2018

Over one-in-three ITDMs (36%) say that without any budgetary constraints, they would want the top priority for their department to be increasing cybersecurity. This is **particularly true among those in the US (39%), and those who work in the IT department (39%).**



in the **US** and in **IT departments** ITDMs believe cybersecurity should be the top priority if the budget was not a concern

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Implications

Implications

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.

Implication

Empower IT decision makers to be able to sort through information quickly by providing links to reviews, news stories and demonstrations. **Developing reliable products with few outages and easily compatible with current systems** will attract with this audience.

2. Mobile workforces are widespread and on the rise.

- Remote capabilities lead to increased productivity and happier employees.

Implication

Products should offer **preeminent security measures**. Statistics on the frequency of security breaches and data losses in cloud products will be important to decision makers.

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.
- Flexibility is the top benefit, while security, data migration, and costs are the biggest challenges.

Implication

Products and service offerings make it **easier for remote workforces to collaborate and connect**.

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.

Implication

Cloud storage as a flexible solution is critical to IT decision makers. Educate IT decision makers on **superior security, easy ways to migrate data, and competitive costs** from cloud solutions.

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