



# Mobility Index Report Q4 2014

Report on App, Platform and  
Device Preferences from the  
Leader in Secure Mobility

February 2015

# Report on App, Platform and Device Preferences from the Leader in Secure Mobility

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This report marks the tenth quarterly installment of the Good Technology™ Mobility Index, an ongoing initiative to track and analyze the impact of mobile apps, platforms and device preferences. This document presents the details of the Good Mobility Index and the methodology behind it.

Good Technology serves more than 6,200 organizations worldwide, including 100% of the FORTUNE 100® commercial banks, aerospace and defense firms and more than half of the other FORTUNE 100 companies. By leveraging data collected from our extensive customer base, the broad portfolio of apps supported through our Good Secure Cloud as well as third-party and custom-built apps on the Good Dynamics® Secure Mobility Platform, Good is uniquely positioned to provide insight into the adoption of new mobile apps, platforms and devices.

# Executive Summary

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Mobile business is becoming more pervasive, and organizations are identifying the need to fortify their cyber resiliency. With the recent cyber attacks on both private and public sector organizations, this quarter's report spotlights the rapid adoption of a wide set of secure mobile apps.

First and foremost is a secure mobile browser, which saw a substantial quarter-over-quarter increase. Custom apps that both extend existing business processes and impact business transformation also continued to be rapidly adopted.

From the device perspective in Q4, we saw the pendulum swing back in favor of smaller form factors. iOS devices gained enterprise market share on the strength of the iPhone 6, which outpaced the larger iPhone 6 Plus. Among Android devices, a similar pattern emerged, with smaller form factors outpacing larger form factors.

# Overall Highlights



**Secure browser activations** nearly **tripled quarter-over-quarter** and grew by over tenfold year over year. **Secure instant message activations** grew **900% in 2014**.



**Custom app activations** continued to **grow** rising by an additional 26%, capping off a year that quadrupled activations year-over-year.



**On tablets, users** are increasingly **utilizing document editing and document access tools**. They ranked **#1** and **#2** respectively on this form factor.



**iOS activations rose to 73%, winning share from Android**. Continuing on the strength seen in September 2014, the iPhone 6 and iPhone 6 Plus powered gains for iOS.



**Android activation share is 25%**, with Samsung accounting for nine of the ten most popular Android devices.



**Smaller form factors outpaced larger ones**. On both the iOS and Android platforms top share went to the smaller model of phones, with the iPhone 6 and Samsung S4 Mini topping larger models.

A blurred background image of a business meeting. In the foreground, a person's hand holds a white tablet. In the background, another person in a suit holds a tablet. A document with various charts and graphs is visible in the lower foreground. The overall scene is professional and tech-oriented.

# DETAILED FINDINGS

Good Technology analyzed both the mobile apps and devices activated by its customers over the fourth quarter of 2014 to highlight trends in mobility, app and device preference.

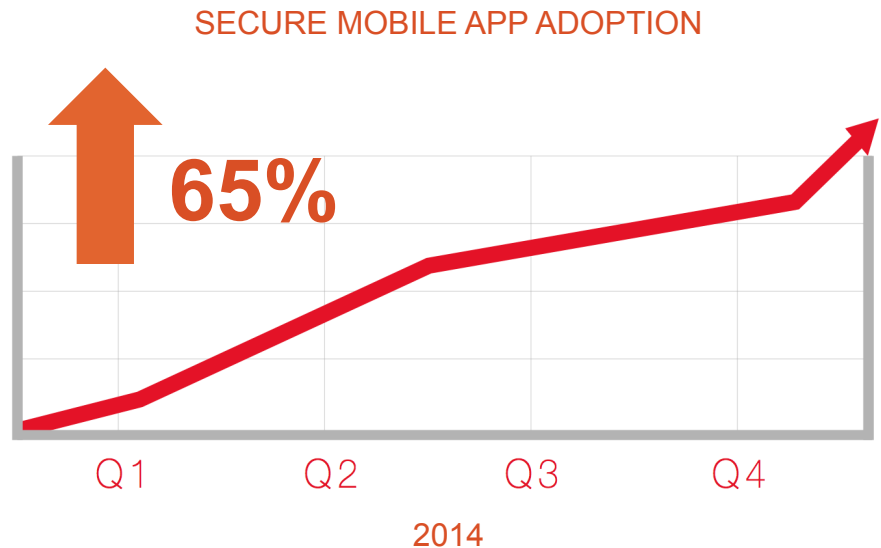


# Record App Growth Led by Secure Browser and Secure Instant Messaging

In the fourth quarter, organizations continued to **mobilize content and apps** at a rapid and accelerating pace. **Enhanced collaboration** and **access to corporate content** led the way, each experiencing dramatic growth.

**Overall app adoption** was up **65%** quarter-over-quarter and over **300%** year-over-year. The single biggest drivers were **secure browsers** and **secure IM**. Secure browser increased by **197%** quarter-over-quarter and was up by over tenfold year-over-year. Secure IM followed close behind with an increase of **131%** quarter-over-quarter and a ninefold year-over-year increase.

**Custom business apps**, the standout of our Q3 mobility index, continued healthy growth with a **26%** increase over its previous record in Q4. However, the growth in secure browser pushed custom apps into second place for all apps.





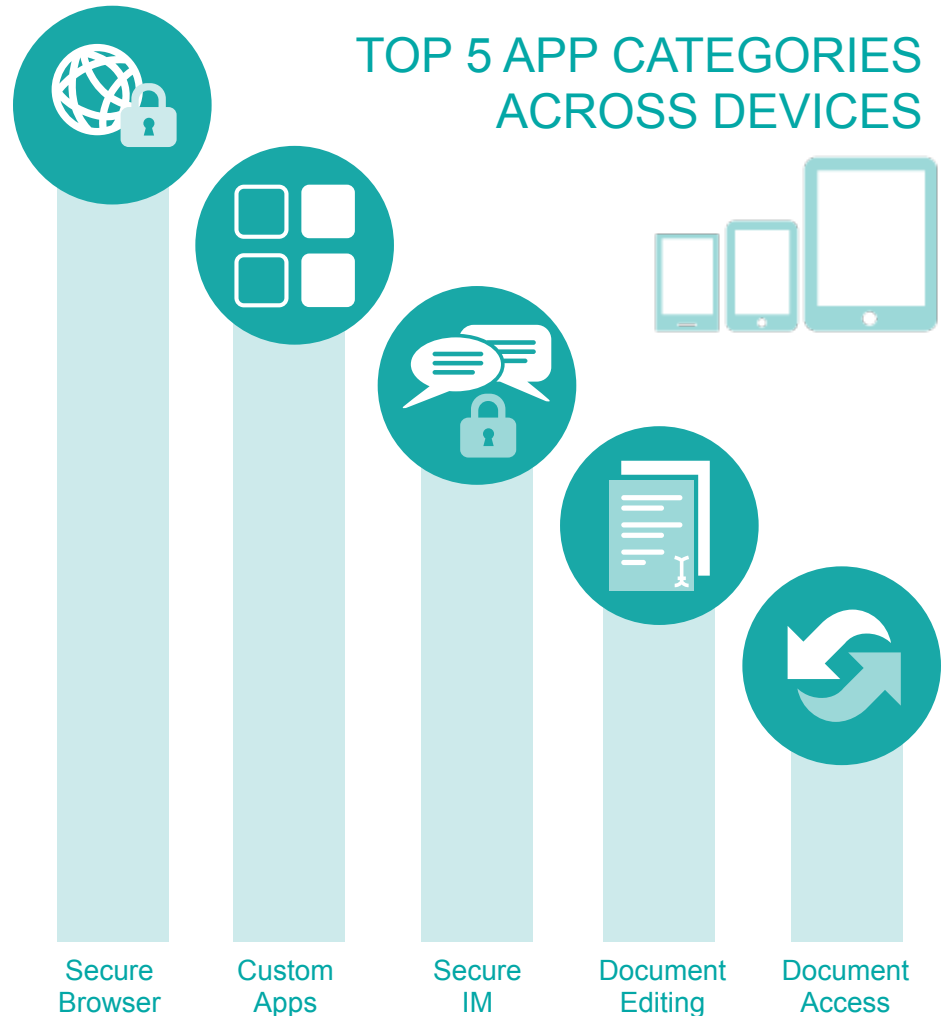
# Secure Browser Jumps Ahead with Custom Apps and Secure IM Close Behind

The rapid rise in secure browsing was the standout story of the quarter. Organizations are increasingly demanding secure access to the corporate intranet as well as data and content behind the corporate firewall.

Today, **secure browser** represents **27%** of all apps deployed by organizations. However, **custom business apps** and **secure IM** are close behind with approximately **20%** each.

They are followed by **document editing** and **document access**, again speaking to the importance of mobilizing business content.

## TOP 5 APP CATEGORIES ACROSS DEVICES





# App Usage Substantially Differs By Form Factor

On *smartphones*, **secure instant messaging** led all apps, but the margin between secure IM and **secure browser** was razor-thin, less than half a percent. **Custom apps** followed not far behind. Smartphone use cases continued to center around rapid access to information while on the go.

On *tablets* a completely different usage pattern emerged. **42%** of all tablet apps centered on **document editing**. This represented more than double the usage of second place **document access** with **custom apps** not far behind. Unlike smartphones, where quick access to information appears paramount, tablet users are undertaking more complex document-oriented tasks.

## TOP 5 APP CATEGORIES

SMARTPHONES			TABLETS		
Secure IM		1st		Document Editing	
Secure Browser		2nd		Document Access	
Custom Apps		3rd		Custom Apps	
Document Access		4th		Secure Browser	
Document Editing		5th		Sales Tools	

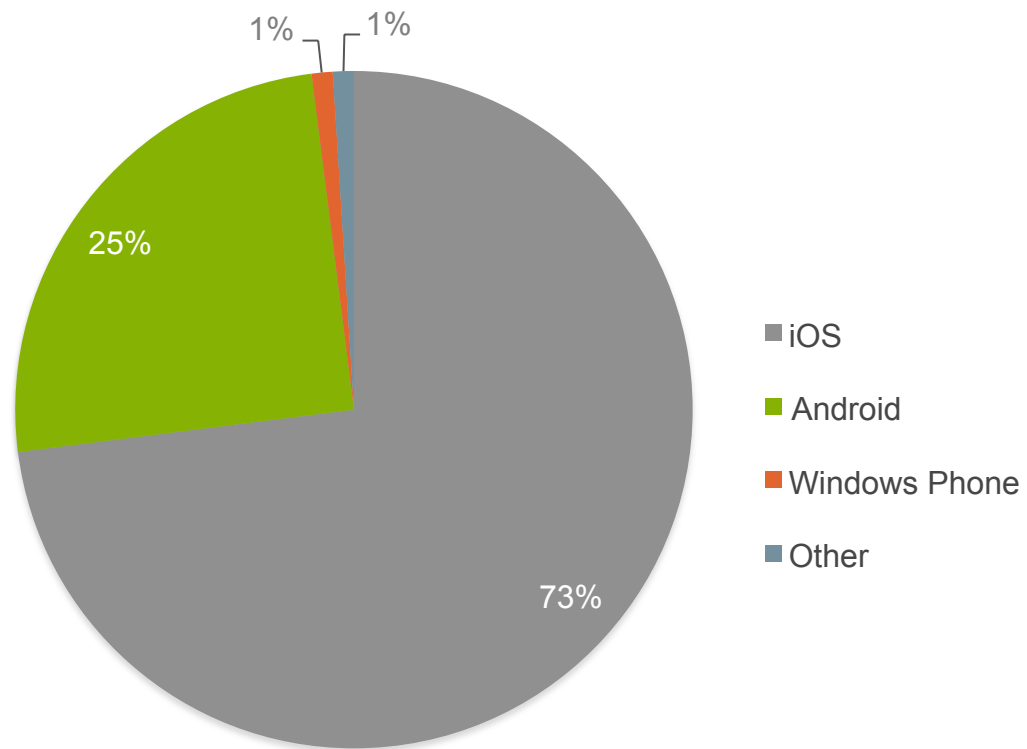


# iOS Retains Top Spot in Activations

Total **iOS activations** increased this quarter, now representing **73%**, up from **69%** in the quarter previous. Android activation share dropped from **29%** to **25%**.

The iOS market share upswing is largely due to the introduction of the *iPhone 6* and *iPhone 6 Plus* last September with their impact carrying over into Q4 2014.

Windows Phone and Microsoft Surface activations remain consistent with the six previous quarters and made up one percent of total device activations.



ACTIVATIONS BY PLATFORM



# iPhone 6 Becomes Most Popular Device

Late in Q3 2014, the release of the **iPhone 6** made an immediate impact on our Q3 Mobility Index.

This trend continued in Q4 2014. Combined the **iPhone 6** and **iPhone 6 Plus** made up **30%** of all activations in Q4. The smaller form factor of the iPhone 6 continued to prove more popular than the larger iPhone 6 Plus.

Of devices in the iPhone 6 family, **77%** were iPhone 6 devices as compared to **23%** iPhone 6 Plus devices. However, this was a shift from Q3 where **85%** of the devices were in the smaller form factor.





# Samsung Leads Android Devices

Among Android devices, **Samsung** took most of the top spots. Various models of Samsung Android devices made up *nine of the top ten* Android models.

Like iOS devices, smaller form factors outpaced Android devices with larger form factors. Top honors went to the **Samsung S4 Mini** while various other models of the **Galaxy S4** and **Galaxy S5** families of devices followed close behind.





# iOS Shows Particular Strength in Regulated Industries

The adoption of devices varied significantly between industries. **iOS significantly outpaced Android** in regulated industries. For example, iOS made up **95%** of devices in the legal industry, **82%** in public sector and **81%** in financial services. While no specific reason is reported, perhaps the perception of security issues across the fragmented Android landscape is slowing Android adoption in these industries. The [recent joint announcement](#) of [Good for Samsung KNOX](#) may alleviate this with time.

In industries with less stringent regulatory compliance restrictions, Android was more widely adopted. First among these was High Tech, where **45%** of all devices were Android devices. Manufacturing and transportation also had above average adoption of Android devices with **39%** and **35%** adoption respectively.

Windows Phone continues to be lightly adopted with the top three industries for these devices being Business and Professional Services, Financial Services and Manufacturing. Increased interest in Microsoft Surface is becoming evident in industries such as Financial Services, Business and Professional Services and Insurance.

# Overview of Good Mobility Index Methodology

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The metrics cited in this report have been directly generated from Good's internal data, as aggregated from all devices activated across Good's worldwide customer base in Q4 2014. Good analyzed activations, by month, among all its global customers that had at least five activated devices over the quarter, to draw conclusions on the overall trends for net new activations across iOS®, Android® and Windows Phone® and Microsoft Surface™ platforms.

Analyzing the long tail of net new device activations by platform provides unique insight into not only the popularity of individual devices and form factors, but also the platforms that enterprises prefer for enabling employees to access business data and applications. Due to the fact that RIM devices use only the BlackBerry® Enterprise Server for corporate email access, Good does not have insight into BlackBerry handset activation trends; and they are not reflected in this report.



# About Good

**Good Technology is the leader in secure mobility solutions, providing the leading secure mobility solution for enterprises and governments worldwide, across all stages of the mobility lifecycle.**

Good offers a comprehensive, end-to-end secure mobility solutions portfolio consists of a suite of collaboration applications, a secure mobility platform, mobile device management, unified monitoring, management and analytics, and a third-party application and partner ecosystem. More than 6,200 organizations in over 190 countries use Good Technology solutions, including FORTUNE® 100 leaders in commercial banking, insurance, healthcare, and aerospace and defense. Learn more at [www.good.com](http://www.good.com).

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