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

This report is part of the Good Technology Mobility Index, an ongoing initiative to track and analyze the impact of mobile apps and platforms. This document presents the details of the Good Mobility Index and the methodology behind it.

With a diverse global customer base that includes FORTUNE 100™ leaders in commercial banking, insurance, healthcare, retail, government, and aerospace and defense, Good is uniquely positioned to provide insight into the adoption of new mobile apps, platforms and devices. Leveraging data collected from our extensive customer base using the Good Dynamics® Secure Mobility Platform, Good is now reporting on enterprise mobile application adoption in addition to device activations.

Executive Summary

In this Q4 report, we see the use of enterprise applications continue to permeate across our customer base. With a 54 percent growth rate quarter over quarter, it's becoming more and more apparent that organizations are leveraging mobile apps to make employees more collaborative, productive and engaged.

While document editing remains the most activated enterprise app, file access and custom apps are gaining significant ground. This aligns with the progression that as enterprises start leveraging mobile apps, they tend to begin with editing capabilities. But, as these organizations seek to maximize the investment they've made in their mobile strategies and truly take advantage of the mobile devices their employees are carrying, accessing documents and deploying custom apps are rapidly becoming the next major area of focus. Other up-and-coming categories include business intelligence, social business, and secure browser.

From a device perspective, we continued to see an increase in iOS activations this quarter, which we can attribute to two new iPhone models coming to market just before the start of the quarter. The overall number of device activations has increased 34 percent from Q1 to Q4 of this year, indicating strong, continued growth and adoption of the Good Secure Mobility Solution. As many organizations are migrating away from BlackBerry to meet end user demand and embrace newer platforms like iOS and Android, they are deploying Good's cross-platform solution to secure both their data and devices.

Overall Highlights:

Total enterprise app activations grew 54 percent quarter over quarter, up from a 43 percent growth rate from Q2 to Q3 2013. The continued momentum around enterprise app growth is a testament to organizations recognizing the power of mobile applications as a collaboration and productivity tool.

Custom app development continues to grow at the rapid rate of 55 percent quarter over quarter. This is a futher increase from the significant 52 percent growth rate reported in last quarter's report.

Doc editing continues to maintain the top spot for most widely used enterprise app, but lost seven points of share this past quarter.

File access exceeded 20 percent share of total activations for the first time.

Business intelligence is the up and coming app this quarter, surging past cloud storage to place in the top five most popular enterprise apps.

While document editing continues to dominate as the enterprise app of choice, **the app categories that reported the greatest amount of growth quarter over quarter include business intelligence, secure browser and social business.**

OS Highlights:

iOS smartphones made up 54 percent of total device activations, and iOS devices claimed the top ten spots for most popular devices among users. As noted in the executive summary, this can be attributed to two new iOS device models coming to market in the last quarter.

While Android's share of activations continued to decrease quarter over quarter at 26 percent, the total number of Android device activations is still three percentage points higher than reported one year ago.

Windows Phone activations remained steady at one percent of total device activations in both quarters. This is equal to the percentage of total activations seen in Q2 and Q3.

Device Type Highlights:

Top three tablet apps activated. Document editing, custom apps and file access made up 86 percent of the total enterprise apps activated on the tablet form factor in Q4.

Top three smartphone apps activated. Surprisingly, given the smaller form factor, document editing also took the top spot for smartphones, outpacing custom apps. File access edged out mobile UC this quarter to round out the top three smart phone apps.

Android tablet activations held steady from Q3 to Q4, while smartphone activations slightly decreased by one percentage point quarter over quarter.

Industry Highlights:

Financial Services continues to lead by a large margin in total iPad activations, recording over 46 percent of total tablet activations in Q4. This is likely attributed to the many use cases for the tablet form factor in this particular sector.

For the first time this quarter, the Energy and Utilities sector was reported as one of the top ten industries in total number of device activations. Rising concerns about cybercrime may be encouraging the industry to utilize mobile technologies more across their vast networks.

Detailed Findings

Good Technology analyzed both the mobile apps and devices activated by its customers over the fourth quarter of 2013 to highlight trends in mobility, app and device preference.

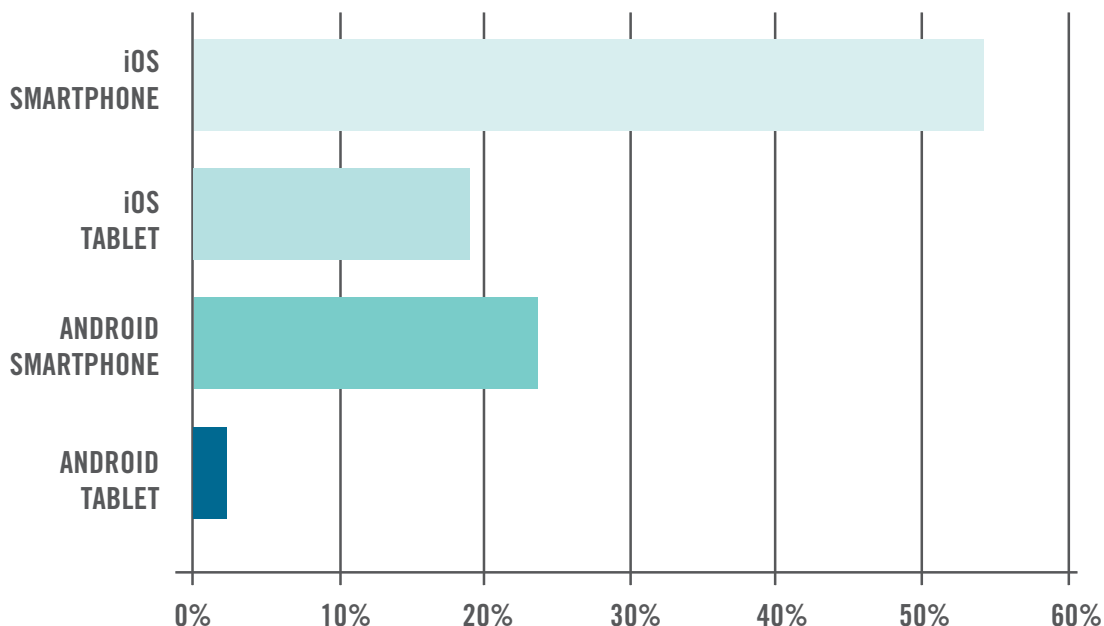**Good ▶ Net Activation by Platform**
Q4 2013: October thru December

iOS activations made up 73 percent of total device activations in Q4, up from 72 percent in Q3 and 69 percent in Q2 of 2013. Android activations decreased one percentage point quarter over quarter and came in at 26 percent of total device activations.

Windows Phone activations made up one percent of total activations each quarter, holding steady in the total number of activations reported in the previous two quarters.
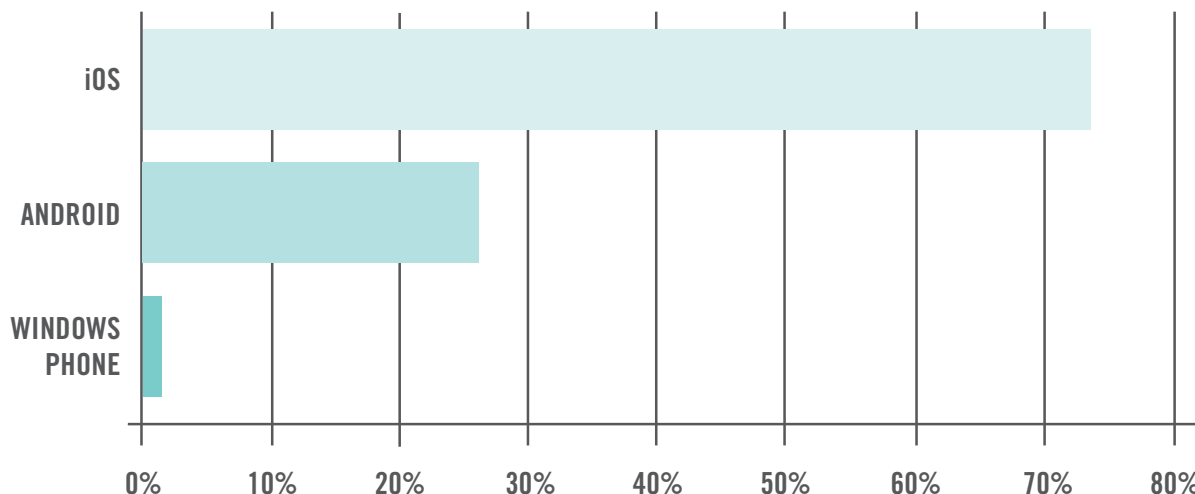
Good ▶ Net Activations by Type of Device
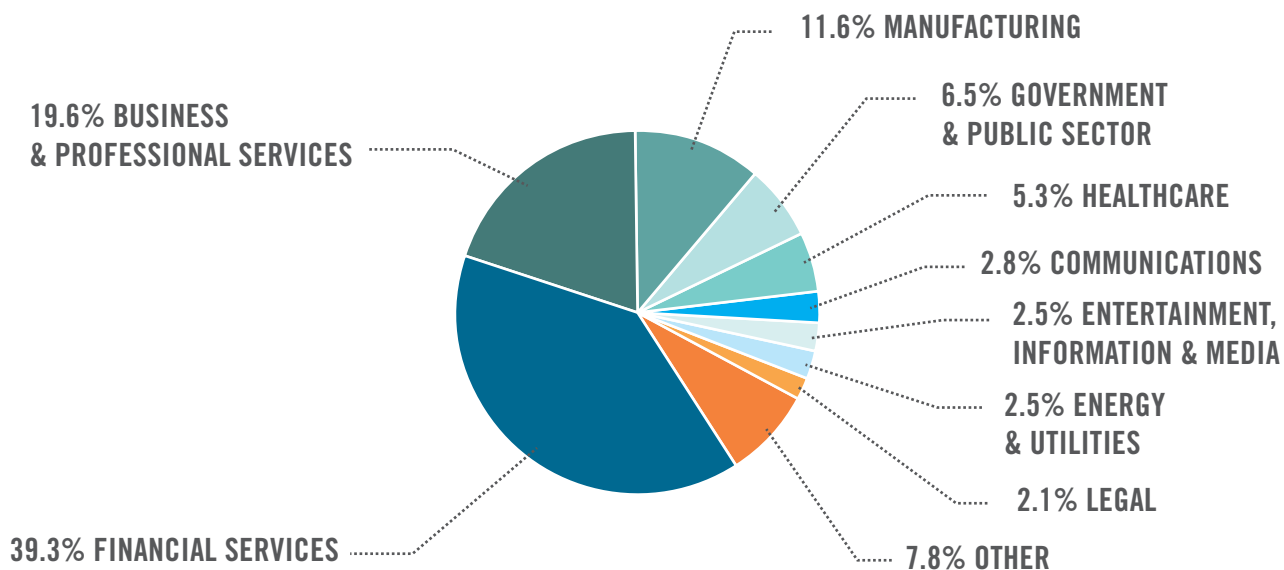Q4 2013: October thru December

Total activations for iOS smartphones increased slightly from Q3 to Q4 and came in at 54 percent. iOS tablet activations, on the other hand, continued to see a decline from 22 percent of activations in Q3 to 19 percent of total activations in Q4. Android tablet activations also held consistent share of total activations at two percent this quarter.
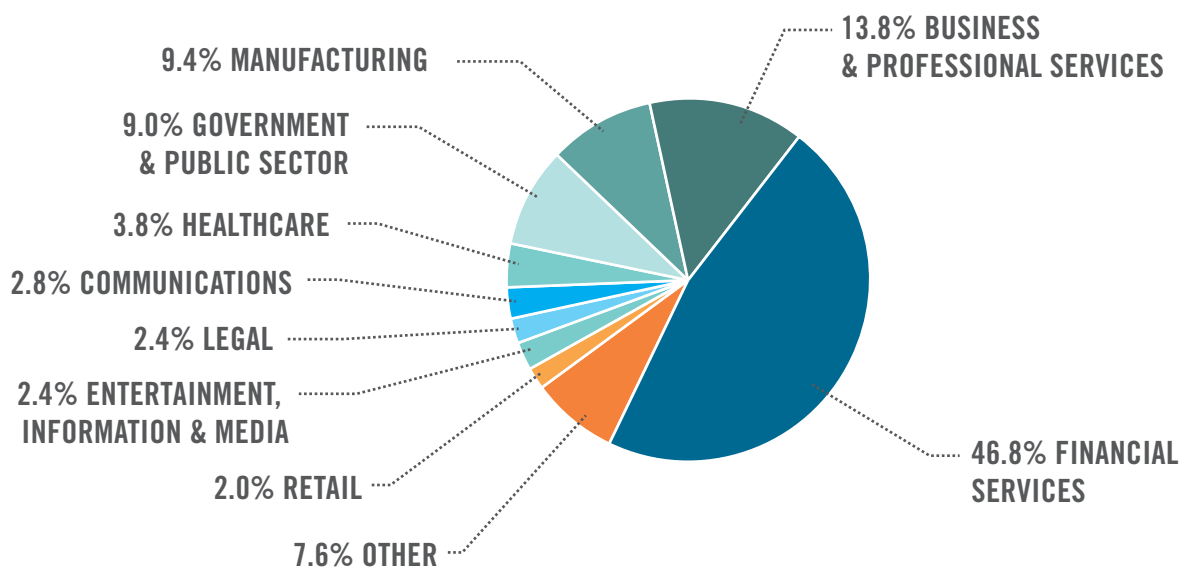
Both Financial Services and Business and Professional Services continued to experience growth this quarter, with Financial Services jumping two percentage points. The Legal sector also experienced a bump quarter over quarter, as did the Energy and Utilities sector.

11.6% MANUFACTURING

6.5% GOVERNMENT & PUBLIC SECTOR

5.3% HEALTHCARE

2.8% COMMUNICATIONS

2.5% ENTERTAINMENT, INFORMATION & MEDIA

2.5% ENERGY & UTILITIES

2.1% LEGAL

7.8% OTHER

39.3% FINANCIAL SERVICES

19.6% BUSINESS & PROFESSIONAL SERVICES

In line with the growth noted above in the Financial Services industry and Business and Professional Services, iPad activations across both also saw significant growth quarter over quarter. After a slight dip last quarter, the Legal sector also saw a bump in activations, as did the Communications sector.

9.4% MANUFACTURING

9.0% GOVERNMENT & PUBLIC SECTOR

3.8% HEALTHCARE

2.8% COMMUNICATIONS

2.4% LEGAL

2.4% ENTERTAINMENT, INFORMATION & MEDIA

2.0% RETAIL

7.6% OTHER

13.8% BUSINESS & PROFESSIONAL SERVICES

46.8% FINANCIAL SERVICES

Up slightly from last quarter, iOS continues to have a stronghold on tablet use within the enterprise, recording 91.4 percent of total tablet activations in Q4.
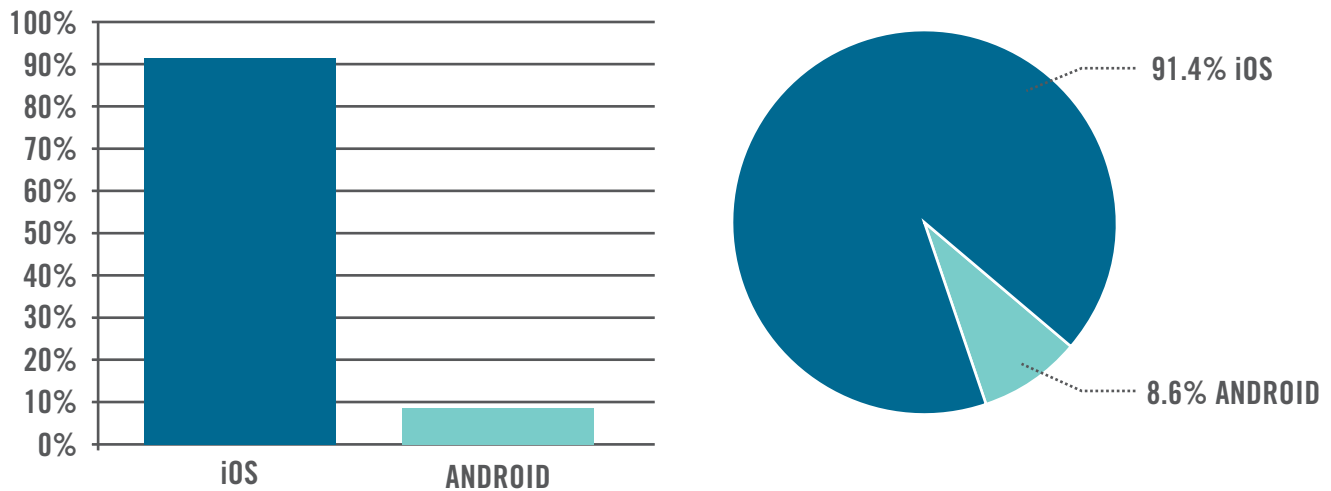
Overview of Good Mobility Index Methodology

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 2013. Good analyzed activations, by month, among its enterprise and government 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™ 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 Technology

Good Technology is the innovation leader in secure mobility solutions; enabling business to move freely and engage at the edge. Good's comprehensive solution consists of a secure mobility platform, mobile device management, a suite of collaboration applications, and a broad third-party application and partner ecosystem that unlocks your mobile potential. More than 5,000 organizations in 130 countries use Good Technology solutions, including FORTUNE 100™ leaders in commercial banking, insurance, healthcare, retail, government, manufacturing and aerospace and defense. Learn more at www.good.com.

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