APPLE IN THE ENTERPRISE
A Global Survey of IT Employee Device Stakeholders
August 2023
The current economic climate is causing a major shift across large enterprises. With business leaders facing uncertainty, every decision made must positively impact the bottom line – including how to effectively deliver the devices used by employees. Apple devices have emerged as a dominant force, captivating corporate users at all levels. IT stakeholders responsible for purchasing and managing technology solutions within large enterprises have increasingly turned their attention to Apple’s lineup of Mac notebooks and desktops as well as iPhone and iPad devices to drive better business outcomes.

This research, based on a survey of over 300 IT stakeholders responsible for selection, delivery, or management of Apple devices at a large company (more than 1,000 employees), examines these trends and endeavors to answer important questions including:

- How is the use of Apple devices changing at large enterprises?
- Do Apple devices provide business advantages to users?
- How do IT stakeholders perceive the productivity and security of Apple devices compared to other options?
- What is the status of existing device management technology for Apple devices?
KEY FINDINGS

Apple use is growing in the enterprise
- 76% of large enterprises report an increase in the use of Apple devices
- iPhone use increased the most (66%) among the different types of Apple devices used by employees
- 57% report that the use of Apple devices grew faster than other types of devices (Windows, Android)

Apple device use is tied to better business outcomes – especially productivity and security
- 87% report that their organization has benefitted by providing Apple devices to employees
- Employee productivity (67%) and improved security (48%) top list of benefits
- Almost four times as many report iPhone and iPad devices are better for the productivity of remote or hybrid employees (56%) compared to Android devices (15%)
- 75% say Apple devices are more secure than other types of devices
- Apple devices are less likely to be targeted by cyber attacks (7% compared to 76% Windows/Android)
- Apple devices are less likely to be breached in an attack (12% compared to 64% Windows/Android)

Implementing device management is a work in progress
- Only 35% characterize their device management capabilities as “Mature”
- 93% would benefit from additional technical capabilities for managing Apple devices
DETAILED FINDINGS

APPLE USE IS GROWING IN THE ENTERPRISE
76% OF LARGE ENTERPRISES REPORT AN INCREASE IN THE USE OF APPLE DEVICES

Overall, how has the number of Apple devices used by your organization’s employees changed in the past year?

- 76% Increased significantly
- 68% Increased slightly
- 20% No change
- 4% Decreased
For each of the following types of Apple devices, please indicate how the number of devices used by your organization’s employees has changed in the past year.

<table>
<thead>
<tr>
<th>Devices</th>
<th>Increased significantly</th>
<th>Increased slightly</th>
<th>No change</th>
<th>Decreased</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>iPhone devices</td>
<td>13%</td>
<td>53%</td>
<td>28%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>iPad devices</td>
<td>10%</td>
<td>38%</td>
<td>42%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Mac notebook</td>
<td>14%</td>
<td>33%</td>
<td>37%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Mac desktop computers</td>
<td>7%</td>
<td>15%</td>
<td>48%</td>
<td>14%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Types of Apple Devices Used

- iPhone: 99%
- iPad: 95%
- Mac notebook: 90%
- Mac desktop: 84%
57% report that Apple device use is growing faster than other options

How has the use of Apple devices changed in the past year compared to other types of employee devices (Windows, Android)?

Choose the one answer that most closely applies.

- Use of Apple devices has increased much faster (57%)
- Use of Apple devices has increased slightly faster (44%)
- There is no difference (31%)
- Use of Windows/Android devices has increased slightly faster (10%)
- Use of Windows/Android devices has increased much faster (2%)
What types of tablets are most frequently requested by your organization’s employees? 
Choose the one answer that most closely applies.

- iPad: 53%
- Android tablet: 20%
- Microsoft Surface: 7%
- Not applicable - employees can’t make requests: 20%

Exclude “Not Applicable”

iPad: 67%
Android tablet: 25%
Microsoft Surface: 8%
INCREASED USE OF IPAD DEVICES IS DRIVEN BY A WIDE RANGE OF BUSINESS NEEDS

What factors are driving increased employee use of iPads at your company? Choose all that apply.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Mobility needs</td>
<td>55%</td>
</tr>
<tr>
<td>Employee demand</td>
<td>51%</td>
</tr>
<tr>
<td>Positive perception of Apple brand</td>
<td>39%</td>
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<tr>
<td>Hybrid and remote work</td>
<td>38%</td>
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<tr>
<td>Security</td>
<td>31%</td>
</tr>
<tr>
<td>Enables more creativity</td>
<td>29%</td>
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<tr>
<td>Wide range of app availability</td>
<td>29%</td>
</tr>
<tr>
<td>Technology innovations delivered by Apple</td>
<td>22%</td>
</tr>
<tr>
<td>Growth in number of employees</td>
<td>21%</td>
</tr>
<tr>
<td>Cost savings (less expensive than laptops)</td>
<td>16%</td>
</tr>
<tr>
<td>Customizable accessibility features</td>
<td>15%</td>
</tr>
<tr>
<td>Other. Please specify:</td>
<td>6%</td>
</tr>
</tbody>
</table>

Most frequent other: Applications that only supported for iPads

n = iPad use has increased in past year
DETAILED FINDINGS

APPLE DEVICE USE IS TIED TO BETTER BUSINESS OUTCOMES
87% HAVE BENEFITED FROM THEIR EMPLOYEES USING APPLE DEVICES

What business benefits has your organization realized by providing Apple devices to your employees? Choose all that apply.

- Increased employee productivity: 67%
- Improved security: 48%
- Reduced TCO: 30%
- Created additional revenue opportunities: 20%
- Other: 7%
- Use of Apple devices has not benefitted our organization: 13%

Most frequent other: Employee satisfaction, morale, or prestige; App availability or support
55% OF EXECUTIVES REPORT THAT APPLE DEVICES ENABLE HIGHER PRODUCTIVITY FOR EMPLOYEES

At your company, how does the productivity of employees using Apple devices compare to the productivity of equivalent work on other types of devices?

- 11% Apple devices enable much higher productivity
- 44% Apple devices enable slightly higher productivity
- 38% There is no difference
- 7% Apple devices slightly less productive for employees
- 0% Apple devices are much less productive for employees
ALMOST FOUR TIMES AS MANY (56% VS. 15%) SAID IPHONE/IPAD DEVICES ARE BETTER FOR REMOTE OR HYBRID PRODUCTIVITY

In your experience, which of these type of devices are better for the productivity and experience of REMOTE or HYBRID employees?

- iPhone and iPad: 56%
- Android smartphones and tablets: 15%
- There is no difference: 29%
MOST (75%) IT PROFESSIONALS BELIEVE THAT APPLE IS MORE SECURE THAN OTHER TYPES OF DEVICES

In your opinion, how does security of Apple devices compare to other types of end user devices?

- 75%: Apple is much more secure
- 45%: Apple is slightly more secure
- 30%: There is no difference
- 22%: Apple is slightly less secure
- 3%: Apple is much less secure
- 0.3%: Other

"Apple takes enterprise security, compliance, and privacy concerns more seriously than other vendors."
APPLE DEVICES ARE LESS LIKELY TO BE TARGETED OR BREACHED IN A CYBERATTACK

In your experience, what type of device is more likely to be TARGETED by a cyber attack?

- Apple devices are more likely to be targeted by cyber attacks: 7%
- Windows or Android devices are more likely to be targeted by cyber attacks: 76%
- There is no difference: 17%

In your experience, how likely is it that a cyberattack on an Apple device will be SUCCESSFUL (i.e. result in a breach) compared to an attack on a Windows or Android device?

- Apple devices are MORE likely to be breached in an attack: 12%
- Apple devices are LESS likely to be breached in an attack: 64%
- There is no difference: 24%
DETAILED FINDINGS

APPLE OFFERS ADVANTAGES FOR THE ENTERPRISE
90% REPORT THAT APPLE DEVICES DELIVER BUSINESS ADVANTAGES

When you think about deploying and managing Apple devices for employees, what advantages come to mind? Choose all that apply.

- Very reliable: 56%
- Devices have a long lifecycle: 53%
- Superior security: 46%
- Good options for device management: 43%
- Technically innovative: 34%
- Other, Please specify: 3%
- Apple devices have no advantages: 10%

Agree 72%
Disagree 28%

"iPhone and iPad are technically superior to Android alternatives."
86% OF LARGE ENTERPRISES ARE PREPARING FOR ECONOMIC UNCERTAINTY

What steps is your IT organization taking to prepare for possible economic uncertainty in the coming year? Choose all that apply.

- Reviewing existing contracts for value: 59%
- Closer scrutiny on new spending: 56%
- Budget cuts: 44%
- Freezing new hires: 33%
- Layoffs: 20%
- Other. Please specify:
  - Layoffs: 2%
  - Freezing new hires: 14%
  - Budget cuts: 0%
  - Closer scrutiny on new spending: 0%
  - Reviewing existing contracts for value: 0%
  - Layoffs: 0%
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THE MAJORITY (82%) OF IT PROFESSIONALS AGREE TOUCH SCREENS ARE PREFERRED BY THEIR EMPLOYEES

"Our employees strongly prefer touch screens over traditional screens."
DETAILED FINDINGS

IMPLEMENTING DEVICE MANAGEMENT IS A WORK IN PROGRESS
ONLY A THIRD (35%) REPORT HAVING A MATURE DEVICE MANAGEMENT PRACTICE

How would you characterize your company’s existing device management capabilities for Apple devices? Choose the one answer that most closely applies.

- **We have a fully mature device management practice with sophisticated tools and processes**: 35%
- **We are in process with our device management practices but are continuing to make investments in tools and processes**: 50%
- **We are just starting our device management practice, and have a plan in place to move forward**: 11%
- **We don’t have a device management practice and have no plans for one**: 5%
Companies with more devices are most likely to report their Apple device management is mature.

How would you characterize your company’s existing device management capabilities for Apple devices? Choose the one answer that most closely applies.

- **More than 20,000**
  - We have a fully mature device management practice with sophisticated tools and processes: 41%
  - We are in process with our device management practices but are continuing to make investments in tools and processes: 44%
  - We are just starting our device management practice, and have a plan in place to move forward: 11%
  - We don’t have a device management practice and have no plans for one: 4%

- **1,000 - 20,000**
  - We have a fully mature device management practice with sophisticated tools and processes: 35%
  - We are in process with our device management practices but are continuing to make investments in tools and processes: 50%
  - We are just starting our device management practice, and have a plan in place to move forward: 12%
  - We don’t have a device management practice and have no plans for one: 3%

- **500 - 1,000**
  - We have a fully mature device management practice with sophisticated tools and processes: 24%
  - We are in process with our device management practices but are continuing to make investments in tools and processes: 60%
  - We are just starting our device management practice, and have a plan in place to move forward: 2%
  - We don’t have a device management practice and have no plans for one: 13%
Which of the following types of tools does your team use to protect your organization's Apple devices? Choose all that apply.
93% of large enterprises would benefit from additional technical capabilities for managing Apple devices.

What additional technical capabilities for device management would allow your company to get more from investments in Apple devices? Choose all that apply.

- Software update management: 56%
- Security enforcement: 50%
- Increased automation: 45%
- Ability to customize for our specific needs: 45%
- Increased visibility across entire Apple fleet: 44%
- Lost device tracking: 39%
- Other: Please specify:
  - Lost device tracking: 1%
  - Increased automation: 45%
  - Increased visibility across entire Apple fleet: 44%
  - Ability to customize for our specific needs: 45%
  - Security enforcement: 50%
  - Software update management: 56%
- We have no need for additional device management capabilities for Apple devices: 7%

Other options:
- Better software management
- Remote screen sharing/support
- Integration with other systems like Microsoft AD

We have no need for additional device management capabilities for Apple devices: 7%
METHODOLOGY AND DEMOGRAPHICS
# GOALS AND METHODOLOGY

## Research Goal
The primary research goal was to capture hard data on experiences and opinions of Apple devices used by employees of large enterprises.

## Methodology
An online survey was sent to independent sources of IT professionals responsible for deployment and management of employee devices in large enterprises. A quota was set to ensure a minimum of 100 C-level (CIO, CTO, CISO, etc.) executives.

A variety of questions were asked on current use and opinions of Apple devices including Mac notebooks and desktops, and iPhones and iPad devices. The survey was fielded in English. Survey responses were collected between May 25 to June 2, 2023.

## Participants
A total of 315 qualified participants completed the survey. All participants had direct responsibility for selection, delivery, or management of Apple devices to employees and worked at a company with more than 500 end-user devices and more than 1,000 employees. Participants represented a wide range of job levels, industries, and global regions.
PARTICIPANT DEMOGRAPHICS

**Company Size**
- More than 20,000 employees: 22%
- 5,000 - 20,000 employees: 21%
- 1,000 - 5,000 employees: 57%

**Number of User Devices**
- 500 - 1,000: 14%
- 1,000 - 5,000: 39%
- More than 20,000: 25%
- 5,000 - 20,000: 22%

**Industry**
- Financial Services and Insurance: 12%
- Technology - Software: 12%
- Education: 12%
- Healthcare: 12%
- Manufacturing: 12%
- Services: 6%
- Telecommunications: 6%
- Government: 6%
- Technology - Other: 6%
- Retail: 6%
- Energy and Utilities: 3%
- Transportation: 3%
- Media: 2%
- Non-profit: 1%
- Food and Beverage: 1%
- Other: 2%
PARTICIPANT DEMOGRAPHICS (CON’T)

**Job Level**
- C-level executive: 32%
- Individual contributor: 25%
- Team manager: 23%
- VP-level executive: 21%

**Region**
- US or Canada: 73%
- Europe: 13%
- Middle East or Africa: 1%
- Australia or New Zealand: 3%
- Asia: 6%
- Mexico, Central, or South America: 3%

**% of Employee Devices that are Apple**
- Less than 20%: 25%
- 20% - 49%: 38%
- 50% or more: 37%
FOR MORE INFORMATION…

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Dimensional Research® provides practical market research for technology companies. We partner with our clients to deliver actionable information that reduces risks, increases customer satisfaction, and grows the business. Our researchers are experts in the applications, devices, and infrastructure used by modern businesses and their customers.

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About Kandji
Kandji is the Apple device management and security platform. Kandji empowers companies to manage and secure Apple devices in the enterprise and at scale. By centrally securing and managing your Mac, iPhone, iPad, and Apple TV devices, IT and InfoSec teams can save countless hours of manual, repetitive work with features like one-click compliance templates and more than 150 pre-built automations, apps, and workflows.

Learn more at http://www.kandji.io.