



# Dell Global Technology Adoption Index

Revealing decision points around technology adoption,  
use and benefits in midsize organizations



Big Data



Cloud



Mobility



Security



# Dell Global Technology Adoption Index Overview

Dell prioritizes developing a deep understanding of our customers' specific technology needs to provide the best possible solutions to unleash their organizations' full potential — regardless of industry. We know that security, cloud, mobility and big data are top IT priorities in organizations around the world. Dell launched the Global Technology Adoption Index (GTAI) and announced its findings at Dell World 2014 to provide a greater awareness of how midsize organizations across the globe are benefitting from these disruptive technologies and what obstacles, if any, are holding them back from harnessing the promised competitive edge.

To develop the GTAI, Dell commissioned TNS to conduct quantitative surveys and qualitative interviews with critical IT decision-makers at midsize organizations (workforces ranging from 100 to 5,000 employees) worldwide. To enable the deep analysis necessary to maximize our research — including industry- and region-specific findings — TNS surveyed 2,038 employees of midsize public and private organizations, distributed across 11 regions worldwide and multiple industries. The survey was conducted between July 15 and Sept. 2, 2014, and has a confidence interval of +/- 2.2 percent.

Below is an in-depth look at the quantitative findings. For more intricate details of the results, please visit [Dell.com/TechAdoption](http://Dell.com/TechAdoption) and the [Dell GTAI Virtual Press Kit](#).

Additionally, to the right are excerpts from the qualitative interviews conducted with IT decision-makers worldwide who completed the survey to provide additional perspective on these disruptive technologies.

## | Security Is a Top Concern

The Dell GTAI findings clearly convey that security creates barriers to adoption of cloud, mobility and big data, as indicated by:

- IT decision-makers still consider security the biggest barrier for expanding mobility technologies (44 percent), using cloud computing (52 percent) and leveraging big data (35 percent).
- While security concerns are holding organizations back from further investing in major technologies, a lack of readily available security information is similarly preventing organizations from being prepared during a security breach. Only 30 percent of respondents said they have the right information available to make risk-based decisions, and only one in four organizations surveyed actually have a plan in place for all types of security breaches.
- The security barrier becomes even more serious as the C-suite becomes less engaged. Only 28 percent of organizations polled have a C-suite mindset that is fully engaged with security initiatives.
- However, in organizations where executive leadership is involved in security, confidence is markedly increased. Among organizations that are very confident in their security, 84 percent of senior leaders are fully or somewhat engaged, compared to only 43 percent of senior leaders at organizations who are not confident in their security.

**"While we still have our data protected, we have a competitive advantage compared to bigger companies."**

— Male  
25-29 from  
Entertainment  
Industry in Brazil



- Security resources are primarily spent on protecting against hackers (43 percent) and adhering to compliance regulations (37 percent).
- Only 39 percent of respondents have a workforce that is fully aware of the organization's own security rules.
- Only 13 percent of those surveyed are using security to enable new things, while only 18 percent are using security as a competitive advantage.

**“Management does not take much interest [in security] and does not see it as a top priority, regardless of increased potential security risks.”**

— Female 25-29 from Engineering & Architecture Industry in Canada

## Plans in Case of Breach



IT decision-makers' perceptions of their organizations' readiness for a breach.

## 🗣️ | The Cloud Era Has Arrived

Cloud usage correlates with revenue growth as cloud adopters see significant benefits — which are even greater for organizations with a deeper commitment to cloud — over those that have not adopted cloud solutions, according to the following findings of the Dell GTAI:

- Nearly every IT decision-maker surveyed said their company either uses or plans to use cloud solutions. Merely 3 percent of respondents are not planning to leverage cloud solutions.
- There's a strong correlation between cloud use and company growth. Of those using cloud, 72 percent of organizations surveyed experienced 6 percent growth or more in the last three years, with just 4 percent experiencing zero or negative growth. This is in sharp contrast with companies not using cloud, where just 24 percent have growth rates of 6 percent or more, and 37 percent experienced either zero or negative growth.
- The business benefits of cloud computing are even more prevalent when organizations use more than one type of cloud solution. For example, organizations using three or more types of cloud solutions experienced a 15 percent increase in employee productivity relative to those using only one type of cloud solution.
- Despite cloud usage rates and the benefits stated above, there are notable challenges facing cloud computing adoption and implementation, most of which stem from a lack of understanding and experience as well as security concerns.

**“We were unable to store and manage the bigger data and after using cloud we can easily manage and use the data, so it is very beneficial for us.”**

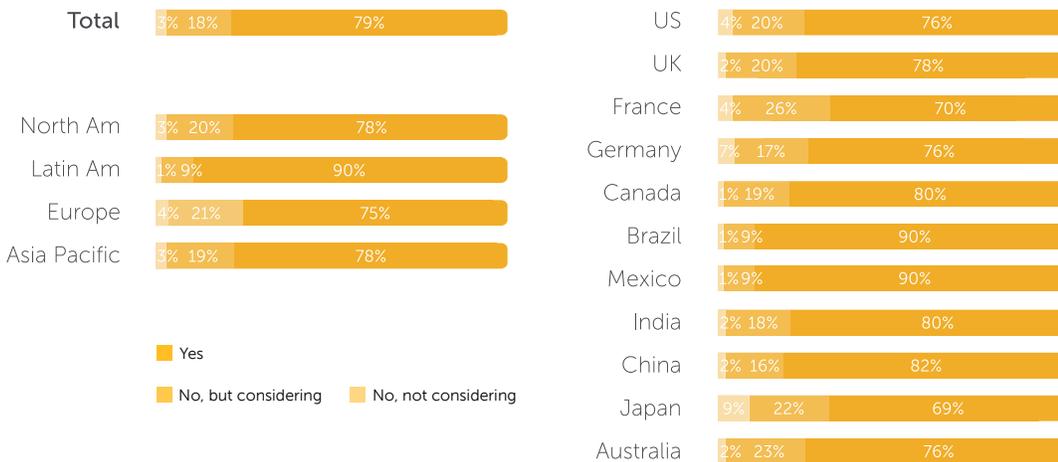
— Male 25-29 from Miscellaneous Industry in India

- Organizations rely heavily on third parties for information about cloud, with 58 percent of those surveyed turning to an IT partner and 45 percent using vendor websites for information.
- Organizations' limited experience with cloud computing was one of the top three reasons (33 percent) why they haven't yet implemented cloud. Security was the top concern at 52 percent.
- Better allocation of IT resources (44 percent), cost savings (42 percent) and efficiency (40 percent) are the three most commonly realized benefits by those using cloud.
- 50 percent of organizations are using one type of cloud, while 26 percent are using more than two types of cloud.

**"We are concerned about security of operations running from the cloud and their susceptibility to interruption by hacker threats. We've taken a 'wait and see' stance for possible future cloud investment."**

— Male 50-54 from Hospitality Industry in the U.S.

## Cloud Usage



The vast majority of midsize organizations are using cloud.

## Mobility Adoption Proceeds Cautiously

The Dell GTAI results clearly reveal that a mobile workforce provides immediate efficiency and productivity benefits. However, security concerns and a lack of cohesive strategy are holding back many organizations from experiencing complete mobility benefits, according to the following data:

- 41 percent of respondents listed efficiency as the biggest mobility benefit, while 32 percent listed employee productivity.
- With mobile use so prevalent in developing countries, organizations in those countries had higher adoption rates of a formal bring-your-own-device (BYOD) policy (34 percent in Latin America and 37 percent in Asia Pacific compared to 30 percent in North America and 20 percent in Europe/Middle East/Africa).
- There are still challenges in the space, with security at the top of the list. Half of respondents cited "risk of data breach from lost devices and unprotected wireless networks" as the biggest mobility risk and 44 percent listed "fear of security breach" as the primary barrier to expanding mobile within the organization.

**"The use of mobile devices brings optimization and efficiency. For example, IT employees don't need to be in the company to solve problems; all he needs is the device in his hands."**

—Male 25-29 in Financial Services Industry in Brazil

- Results show that having a formal BYOD policy is tightly linked to being successful with mobility; however, only 32 percent of respondents have one.
- 28 percent of respondents listed expanding network bandwidth as a key mobile priority, particularly in developing countries. Developing tools to make employees more efficient (25 percent) and applications (22 percent) are also important.
- While access to cloud databases (76 percent), email (81 percent) and intranets (70 percent) are included in most BYOD plans, end-of-life/asset retirement protocols are only covered in 55 percent of plans.
- After security, cost (40 percent) and the complexity of managing multiple platforms and devices (36 percent) are cited as the biggest mobility risks.

**“The main risk [of mobility] is the loss of data and the unprotected wireless networks as they can leak the data of the company.”**

—Female 35-39 in Engineering & Architecture Industry in Mexico

## Barriers to Expanding Mobile



IT decision-makers cite barriers to expanding mobile within their organization.

## | Big Data Has Room to Grow

Dell GTAI respondents indicated that big data is less of a pressing issue than security, cloud and mobility. While most organizations collect some form of big data, many are not leveraging it because they have yet to identify an effective approach. Those that do effectively leverage big data experience higher revenue growth rates, according to the following results:

- While 61 percent of global respondents said they had big data that could be analyzed, only 39 percent understood how to extract value from big data and are pursuing it.
- Big data presents a major competitive opportunity, as those organizations that are the most effective in deriving business insights from big data are seeing much higher growth rates than those that are not. The average three-year growth rate (14 percent) for those most effective in leveraging big data is almost twice as high as that of organizations least effective in using big data (8 percent).
- While big data has proven marketing benefits, infrastructure costs (35 percent) and security (35 percent) tend to be the primary obstacles for implementing big data initiatives.
- Analytics/operational costs (34 percent), lack of management support (22 percent) and lack of technical skills (21 percent) are additional barriers in big data strategies.

**“The more data we have on our customers the more we can understand them and thus we can categorize their needs and provide those services. It helped us improve customer satisfaction as well as increase our customer foothold.”**

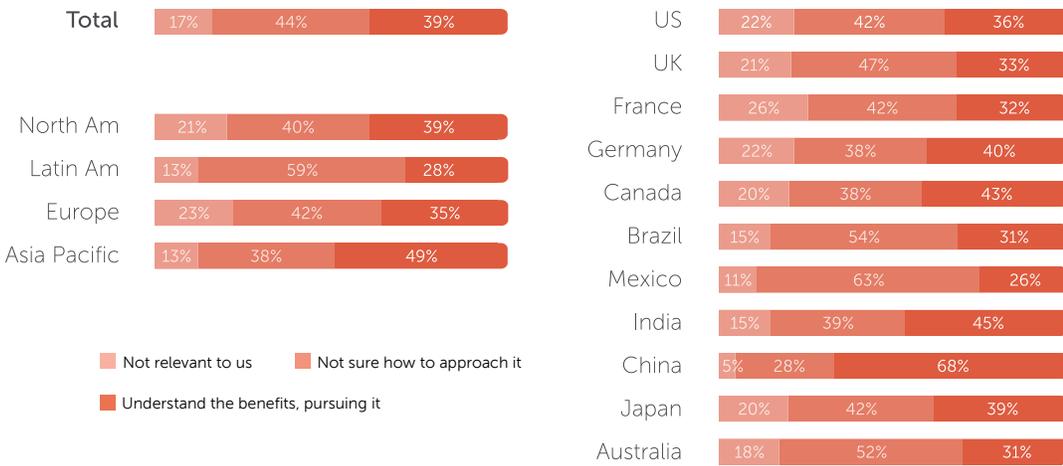
—Female 25-29 in Financial Services & Banking Industry in the UK

- In response to security concerns, most organizations are leveraging private clouds (43 percent) or traditional servers (24 percent) instead of public clouds (11 percent) to store big data.
- Operations make up the most common type of data set leveraged, with 67 percent of organizations responding their organizations use operations data. CRM (47 percent), sales (39 percent) and social (34 percent) make up the other common types of data sets.
- Organizations on average feel they are getting only 53 percent of the potential insights from their available data.
- Industries such as financial (57 percent) and healthcare and telecom (both at 56 percent) are more apt to take advantage of their big data than others.

**“Sometimes we feel frustrated that the return on investment [on big data] is lower than expected. It costs us a lot to collect the huge amount of data; however, we cannot analyze them efficiently.”**

—Male 30-34 in Manufacturing & Natural Resources Industry in China

## Thinking About Big Data



Many IT decision-makers are not sure how to use big data to their advantage.