

# Desktop Virtualization Demand Continues To Grow In Harmony With BYO

## Introduction

The prevalence of consumer smartphones and tablets and mature enterprise mobile applications has empowered workers to demand flexible and mobile working styles — adding pressure on IT to change how it supports multiple devices, applications, and different segments of the workforce. In this era of evolving work styles — where workers are always connected and work online across many locations — virtualization offers the flexibility to drive higher levels of employee satisfaction, efficiency, security, and even a competitive advantage.

This 1E-commissioned profile of IT decision-makers at US and UK enterprises evaluates how they are shifting to embrace end user centricity within IT, based on Forrester's own market data and a custom study of a similar audience.

## The Most Motivated Employees Close The Tech Gap With BYO

The consumerization of IT has enabled workers to demand the freedom to choose their devices, applications, and even operating systems. As a result, IT is becoming more end user-centric to accommodate workers who:

- › **Are indifferent to service and technology that IT provides.** Forrester's Forrsights Applications And Collaboration Workforce Survey, Q4 2013, showed more than 50% of US and UK enterprise workers are generally indifferent/neutral to the services and technology provided by IT.
- › **Can work from any location.** Today's employees seek technology that will enable them to work in all the places that they might want to, such as at home, in public places, and when commuting (see Figure 1).
- › **Value technology to do their jobs.** Forrester's Forrsights Applications And Collaboration Workforce Survey, Q4 2013, also revealed that 38% of employees in the US and UK who describe themselves as putting a lot of time and energy into their careers would be willing to contribute their own funds to buy technology for work to close the technology gap.

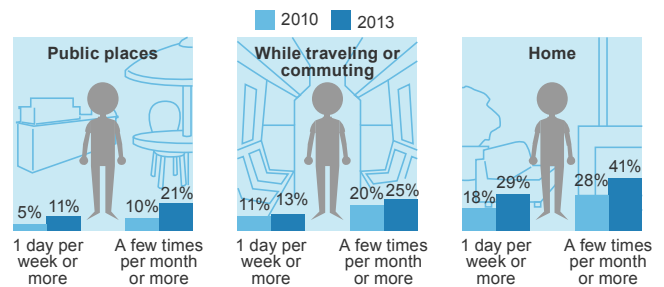
## Employee Centricity And Flexibility Are Key To Competitive Advantage

Results from the custom study revealed that IT organizations are interested in improving employee centricity for (see Figure 2):

- › **Greater employee flexibility.** Almost two-thirds of organizations surveyed said that improving employee centricity within IT is critical to enable greater employee flexibility. Workers value choice and flexibility to make autonomous decisions about how and where they do their work.
- › **Improvement in the organizations' competitive advantage.** In the age of the customer, the key to organizational success is to ensure that customer interactions meet customer experience requirements.<sup>1</sup> Sixty-three percent of those surveyed stressed that employee centricity within IT improves their competitive advantage as a company. Enabling employees to help and respond quickly and effectively to customers'

requirements will improve the organizations' competitiveness.

**FIGURE 1**  
Employees Work From Many Locations



2010 Base: 5,519 global information workers

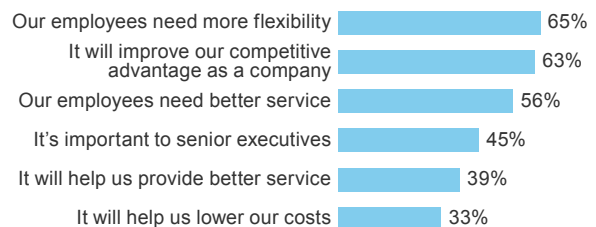
2013 Base: 9,235 global information workers

Source: Forrester's Forrsights Workforce Employee Survey, Q3 2010, Forrester's Forrsights Global Workforce Benchmark Survey, Q4 2013

**FIGURE 2**  
Employee Need For Flexibility Is Driving Increased Employee Centricity Within IT

**"Why is your company interested in improving employee centricity within IT?"**

(Select all that apply)



Base: 109 IT professionals in the US and UK

Source: A commissioned study conducted by Forrester Consulting on behalf of 1E, July 2014

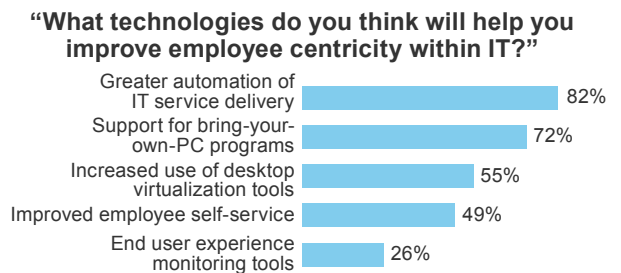
## IT Uses Service Delivery Automation, BYO, And Desktop Virtualization As Enablers For Employee Centricity

The custom study also explored the technologies that IT decision-makers will use to help improve employee centricity within IT. The vast majority of survey respondents (82%) identified greater automation of IT service delivery as the key enabler of employee centricity (see Figure 3). Further support for bring-your-own-PC (BYOPC) (72%) and desktop virtualization tools (55%) also play an important role.

IT decision-makers are seeing a number of benefits from implementing a bring-your-own (BYO) policy for their department. When asked about the potential benefits for employees using personally owned devices for work, respondents said they seek (see Figure 4):

- › **The adoption of newer and better security approaches.** Exposing company data to noncompany-controlled devices poses a challenge for IT. Providing advice to users and leveraging security tools to enable workers to secure their own devices is high on the agenda. IT decision-makers surveyed did not shy away from the challenges; instead, 58% said BYO will drive them to adopt newer and better security approaches.
- › **Reduced support costs.** Half of the respondents surveyed said that BYO will enable IT to reduce support in the long term. Enabling additional self-service support for BYO employees frees up IT's time to focus on business-critical technology initiatives.

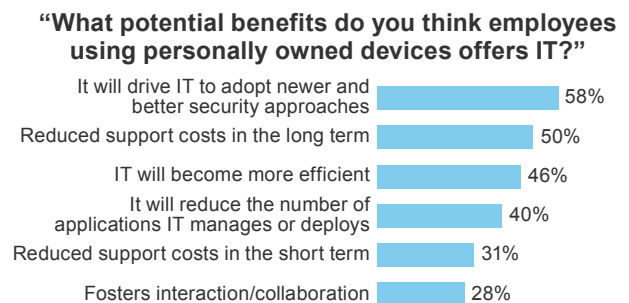
**FIGURE 3**  
Service Delivery Automation, BYO, And Desktop Virtualization Will Enable Greater Employee Centricity



Base: 109 IT professionals in the US and UK

Source: A commissioned study conducted by Forrester Consulting on behalf of 1E, July 2014

**FIGURE 4**  
Better Security Approaches And Reduced Support Costs Are The Benefits Of BYO For IT



Base: 109 IT professionals in the US and UK

Source: A commissioned study conducted by Forrester Consulting on behalf of 1E, July 2014

## IT Faces Challenges

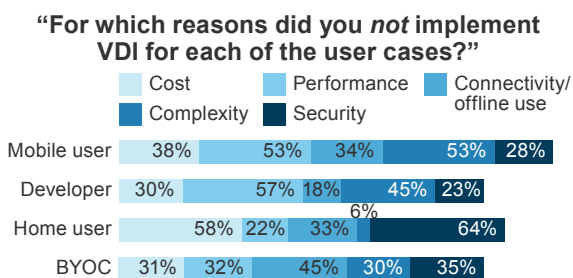
When asked about IT readiness to be more employee-centric, over half of respondents surveyed said they either were somewhat ready or have a long way to go (52%). To investigate further, respondents were asked about one of the enablers of end user centricity — the usage and adoption of virtual desktop infrastructure (VDI).

VDI penetration in the workforce remains low. Forty-four percent of survey respondents said that less than 20% of workers are using a server-hosted desktop (such as VDI) as their primary desktop. In addition, the study revealed that VDI is primarily deployed to mobile users (71%).

Respondents were asked the primary reasons for not implementing VDI for a number of different use case (see Figure 5). IT professionals are challenged to implement VDI primarily due to the complexity of integrating with different aspects of the organizations' ecosystems and maintaining performance.

VDI inherently requires a reliable, always-on, high-performance network, which presents a challenge for an increasingly mobile workforce because the network quality they may have available may not be good enough for VDI to work for them. VDI also relies on expensive, high-performance data center hardware and hypervisor technology that requires highly specialized skills to deploy and maintain.

**FIGURE 5**  
IT Struggles With VDI Complexity And Performance



Base: 109 IT professionals in the US and UK

Source: A commissioned study conducted by Forrester Consulting on behalf of 1E, July 2014

## Locally Deployed Virtual Desktops Can Accelerate Employee Centricity Within IT

Given the challenges that IT organizations face, it is unsurprising that Forrester's Forrsights Hardware Survey, Q3 2013, revealed that VDI interest among IT decision-makers is not growing as fast as other desktop virtualization technologies — particularly compared with local virtual desktop technology.

A local virtual desktop, where the entire desktop environment executes in a protected environment on the employee's device, offers IT a powerful way to enable and support different working styles. As workers continue to broaden their usage and adoption of personal devices within the office, the ability for virtual machines to run business applications on top of an existing operating system gives employees the flexibility to securely access work data while providing privacy of personal files and applications across all devices — even while they are offline.

For IT, all the data and applications are fully managed and secured by the same policies that govern the physical device, making it easier to manage and support frequently travelling employees, those who work offline, or those who want to use their own personal devices for work.

## Key Takeaways

This custom Technology Adoption Profile commissioned by 1E yielded three key takeaways:

- › IT organizations that put employee centricity at the core of their strategy expect to enable workforce flexibility and opportunities for competitive advantage.
- › Bring-your-own-device (BYOD) will require the adoption of new and innovative security approaches to control the exposure of company and employee sensitive data across different form factors.
- › Local virtual desktops can provide IT with a powerful employee-centric tool to enable it to support its ever mobile workers through BYOD initiatives.

## Methodology

This Technology Adoption Profile was commissioned by 1E. To create this profile, Forrester leveraged its Forrsights data. Forrester Consulting supplemented this data with custom survey questions asked of IT decision-makers. The auxiliary custom survey was conducted in July 2014. For more information on Forrester's data panel and Tech Industry Consulting services, visit [www.forrester.com](http://www.forrester.com).

## Endnotes

<sup>1</sup> Forrester Research defines the age of the customer as "a 20-year business cycle in which the most successful enterprises will reinvent themselves to systematically understand and serve increasingly powerful customers." Source: "Technology Management In The Age Of The Customer," Forrester Research, Inc., October 10, 2013.

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