

McLAUGHLIN & ASSOCIATES
CTIA- THE WIRELESS ASSOCIATION
NATIONAL SURVEY OF IT DECISION-MAKERS
JULY 27, 2012

1. WHAT IS YOUR AGE? ARE YOU BETWEEN...

Total	500
18-29	11.0
30-40	35.8
41-55	36.2
56-65	14.4
OVER 65	2.6
Mean	43.08

2. GENDER:

Total	500
MALE	60.2
FEMALE	39.8

3. REGION:

Total	500
NORTHEAST	18.4
MIDWEST	22.2
SOUTH	34.4
WEST	25.0

4. DO YOU WORK IN THE IT DEPARTMENT OF ANY TYPE OF BUSINESS, ORGANIZATION OR GOVERNMENT OFFICE, OR DO YOU WORK FOR AN IT FIRM THAT PROVIDES IT SERVICES TO CLIENTS?

Total	500
YES, IT DEPT.	100.0

5. ARE YOU INVOLVED IN MAKING THE FINAL RECOMMENDATIONS OR DECISIONS ABOUT WHAT TYPE OF IT RELATED HARDWARE, SOFTWARE, HOSTING OR SERVICES YOUR ORGANIZATION USES?

Total	500
YES	100.0

6. IS YOUR PRIMARY AREA OF RESPONSIBILITY?

Total	500
IT SERV./OUTSOURC./SYS. INTEG./CONSULT.	31.2
IT STRATEGY	24.8
TECH. SPPRT./HELP DESK	12.0
NETWORK ENGIN./SYS. DEVL.	9.4
APP. DEVELP./PROGRAM.	6.8
E-COMMERCE	4.6
WEB DEVL./MNGMNT.	4.4
SECURITY/PRIVACY	2.4
COMPLIANCE	1.6
OTHER	2.8

7. WHAT BEST DESCRIBES YOUR MANAGEMENT LEVEL?

Total	500
OFFICER/EXEC. VP/S.VP/VP	40.4
CORPORATE OFFICER	28.4
EXEC. VP/SENIOR VP/VP	12.0
DIRECTOR/MANAGER	53.4
DIRECTOR	22.2
MANAGER	31.2
OTHER	6.2

8. WHAT BEST DESCRIBES YOUR ORGANIZATION'S INDUSTRY OR FUNCTION?

Total	500
MANUFACTURING	17.8
BUSINESS SERV./CONSULT.	13.4
EDUCATION	7.4
FINANCE/BANKING	7.4
HEALTHCARE/MEDICAL	7.4
RETAIL	5.6
CONSTRUCTION	5.2
TRANSPORTATION	5.2
INS./REAL ESTATE/LEGAL	4.8
GOV'T/STATE OR LOCAL	3.0
GOV'T/FED. OR MILITARY	2.4
WHOLESALE/DISTRIBUTOR	2.4
UTILITIES	2.2
NON-PROFIT	2.0
AEROSPACE/DEFNS.	1.4
MEDIA/CONTENT/ ADVERTISING	1.4
AGRICULTURE	1.2
MINING/OIL/GAS	-
OTHER	9.8

9. ROUGHLY, HOW MANY EMPLOYEES DOES YOUR ORGANIZATION HAVE (WORLDWIDE)?

Total	500
UNDER 100	22.8
LESS THAN 25	13.0
25-99	9.8
100-999	36.4
100-499	17.6
500-999	18.8
OVER 1000	40.6
1000-4999	21.4
OVER 5000	19.2
DON'T KNOW	0.2

10. IF YOU HAD A TOTAL OF 100-POINTS TO DISTRIBUTE AMONG THE FOLLOWING CYBER-SECURITY CHALLENGES, HOW MANY POINTS WOULD YOU ASSIGN TO EACH ONE BASED ON ITS LEVEL OF IMPORTANCE? THE DISTRIBUTION OF YOUR POINTS NEEDS TO ADD UP TO 100. THE MORE IMPORTANT THE ISSUE IS TO YOU, THE MORE POINTS YOU SHOULD ASSIGN IT.

Total	500
COMPANY INFO/SYSTEMS	29.55
PERSONAL COMP.	22.10
WORK INFO/CLOUD	17.75
GOV'T INFO/SYSTEMS	15.61
SMARTPHONE/TABLETS	14.99

11. HOW VULNERABLE DO YOU THINK SMARTPHONES ARE TO CYBER-ATTACKS, INCLUDING THINGS LIKE SPAM, MALWARE, PHISHING, TROJANS, AND BOTNETS?

Total	500
VULNERABLE	86.4
VERY	30.4
SOMEWHAT	56.0
NOT VULNERABLE	13.6
NOT REALLY	12.2
NOT AT ALL	1.4

12. HOW VULNERABLE DO YOU THINK TABLETS ARE TO CYBER-ATTACKS, INCLUDING THINGS LIKE SPAM, MALWARE, PHISHING, TROJANS, AND BOTNETS?

Total	500
VULNERABLE	88.4
VERY	32.2
SOMEWHAT	56.2
NOT VULNERABLE	11.6
NOT REALLY	10.0
NOT AT ALL	1.6

13. DO YOU THINK ABOUT CYBER-SECURITY ON A MOBILE DEVICE THE SAME WAY AS ON A PERSONAL COMPUTER (FOR EXAMPLE, APPLYING ANTI-SPAM OR ANTI-VIRUS TOOLS)?

Total	500
YES	68.0
NO	32.0

14. WHEN YOU THINK ABOUT APPLICATION STORES, MOBILE NETWORKS, SMARTPHONE OPERATING SYSTEMS AND APPLICATIONS, DO YOU THINK THEY NEED TO WORK TOGETHER TO PROVIDE END-TO-END CYBER-SECURITY?

Total	500
YES	95.2
NO	4.8

15. IF YOU HAD A TOTAL OF 100-POINTS TO DISTRIBUTE AMONG THE FOLLOWING MOBILE CYBER-SECURITY ISSUES, HOW MANY POINTS WOULD YOU ASSIGN TO EACH ONE BASED ON ITS LEVEL OF IMPORTANCE? THE DISTRIBUTION OF YOUR POINTS NEEDS TO ADD UP TO 100. THE MORE IMPORTANT THE ISSUE IS TO YOU, THE MORE POINTS YOU SHOULD ASSIGN IT.

Total	500
LACK/CYBER SEC.	27.75
LACK/CONSUMER EDU.	25.79
LACK COOP./MOBILE INDSTRY	24.50
LACK INFO SHARE./GOV'T	21.96
INDUSTRY & GOV'T	

16. HOW WELL DO YOU THINK THE MOBILE INDUSTRY IS ADDRESSING CYBER-SECURITY AND OFFERING SOLUTIONS?

Total	500
POSITIVE	49.4
EXCELLENT	10.2
GOOD	39.2
NEGATIVE	50.6
FAIR	39.6
POOR	11.0

17. WHO DO YOU THINK IS BETTER EQUIPPED TO DEFINE CYBER-SECURITY STANDARDS?

Total	500
THE MOBILE INDUSTRY	77.4
THE GOVERNMENT	22.6

18. DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT? "GOVERNMENT SHOULD ALLOW COMPANIES TO EXCHANGE INFORMATION TO HELP IDENTIFY VULNERABILITIES AND PROTECT USERS FROM HACKING AND CYBER-FRAUD."

Total	500
AGREE	96.0
STRONGLY	49.4
SOMEWHAT	46.6
DISAGREE	4.0
SOMEWHAT	2.2
STRONGLY	1.8

19. HOW SHOULD INDUSTRY AND GOVERNMENT PROCEED ON CYBER-SECURITY?

- 1.INDUSTRY AND GOVERNMENT SHOULD SHARE INFORMATION ON THREATS WITHOUT DEFINING STANDARDS.
- 2.INDUSTRY AND GOVERNMENT SHOULD SHARE INFORMATION ON THREATS, AND WORK COLLABORATIVELY TO DEFINE STANDARDS.
- 3.GOVERNMENT SHOULD TAKE THE LEAD IN DEFINING STANDARDS.
- 4.INDUSTRY SHOULD TAKE THE LEAD IN DEFINING STANDARDS.

Total	500
SHARE INFO.	81.2
SHARE/WITHOUT	13.2
DEFINING STANDARDS	
SHARE/DEFINE	68.0
STANDARDS	
GOV'T TAKE LEAD	4.0
INDUSTRY TAKE LEAD	14.8

20. WHEN YOU THINK ABOUT YOUR CURRENT MOBILE IT STRATEGY AND DEPLOYMENT WHAT IS YOUR PRIMARY FOCUS?

Total	500
INTERNAL/STAFF	46.2
DEPLOYMENT	
CONSUMER/CUSTOMER	31.8
AUTOMATION OF PROCESSES	20.0
OTHER	2.0

21. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"QUANTIFYING RETURN ON INVESTMENT (ROI)"

Total	500
MOST IMPORTANT/ CHALLENGING	39.4
IMPORTANT/CHALLENGING	42.8
LEAST IMPORTANT/ CHALLENGING	17.8

22. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"CHOOSING A DEVICE AND PLATFORM"

Total	500
MOST IMPORTANT/ CHALLENGING	37.8
IMPORTANT/CHALLENGING	46.0
LEAST IMPORTANT/ CHALLENGING	16.2

23. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"DETERMINING CORPORATE POLICY: WHO SHOULD HAVE, WHO'S LIABLE, BILLING ETC."

Total	500
MOST IMPORTANT/ CHALLENGING	37.2
IMPORTANT/CHALLENGING	43.6
LEAST IMPORTANT/ CHALLENGING	19.2

24. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"HELP DESK ISSUES"

Total	500
MOST IMPORTANT/ CHALLENGING	23.4
IMPORTANT/CHALLENGING	51.6
LEAST IMPORTANT/ CHALLENGING	25.0

25. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"SECURITY"

Total	500
MOST IMPORTANT/ CHALLENGING	79.4
IMPORTANT/CHALLENGING	17.0
LEAST IMPORTANT/ CHALLENGING	3.6

26. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"CHOOSING THE RIGHT VENDOR/WIRELESS PARTNER"

Total	500
MOST IMPORTANT/ CHALLENGING	32.8
IMPORTANT/CHALLENGING	49.0
LEAST IMPORTANT/ CHALLENGING	18.2

27. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"APP MANAGEMENT"

Total	500
MOST IMPORTANT/ CHALLENGING	32.0
IMPORTANT/CHALLENGING	49.2
LEAST IMPORTANT/ CHALLENGING	18.8

28. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"COST AND EXPENSE"

Total	500
MOST IMPORTANT/ CHALLENGING	61.6
IMPORTANT/CHALLENGING	31.0
LEAST IMPORTANT/ CHALLENGING	7.4

29. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
 "BRING YOUR OWN DEVICE (BYOD)"

Total	500
MOST IMPORTANT/ CHALLENGING	16.8
IMPORTANT/CHALLENGING	37.8
LEAST IMPORTANT/ CHALLENGING	45.4

30. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
 "INTEGRATING MOBILE INTO EXISTING LEGACY SYSTEMS"

Total	500
MOST IMPORTANT/ CHALLENGING	40.0
IMPORTANT/CHALLENGING	43.6
LEAST IMPORTANT/ CHALLENGING	16.4

SumMOST. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
 "MOST IMPORTANT & CHALLENGING"

Total	500
SECURITY	79.4
COST AND EXPENSE	61.6
INTEGRATING MOBILE INTO EXISTING LEGACY SYSTEMS	40.0
QUANTIFYING RETURN ON INVESTMENT (ROI)	39.4
CHOOSING A DEVICE AND PLATFORM	37.8
DETERMINING CORPORATE POLICY: WHO SHOULD HAVE, WHO'S LIABLE, BILLING ETC.	37.2
CHOOSING THE RIGHT VENDOR/WIRELESS PARTNER	32.8
APP MANAGEMENT	32.0
HELP DESK ISSUES	23.4
BRING YOUR OWN DEVICE (BYOD)	16.8

SumIMPRT. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"IMPORTANT & CHALLENGING"

Total	500
HELP DESK ISSUES	51.6
APP MANAGEMENT	49.2
CHOOSING THE RIGHT VENDOR/WIRELESS PARTNER	49.0
CHOOSING A DEVICE AND PLATFORM	46.0
DETERMINING CORPORATE POLICY: WHO SHOULD HAVE, WHO'S LIABLE, BILLING ETC.	43.6
INTEGRATING MOBILE INTO EXISTING LEGACY SYSTEMS	43.6
QUANTIFYING RETURN ON INVESTMENT (ROI)	42.8
BRING YOUR OWN DEVICE (BYOD)	37.8
COST AND EXPENSE SECURITY	31.0
	17.0

SumLEAST. IN CONSIDERING THIS STRATEGY, WHAT ARE YOUR PRIMARY PAIN-POINTS AND CHALLENGES?
"LEAST IMPORTANT & CHALLENGING"

Total	500
BRING YOUR OWN DEVICE (BYOD)	45.4
HELP DESK ISSUES	25.0
DETERMINING CORPORATE POLICY: WHO SHOULD HAVE, WHO'S LIABLE, BILLING ETC.	19.2
APP MANAGEMENT	18.8
CHOOSING THE RIGHT VENDOR/WIRELESS PARTNER	18.2
QUANTIFYING RETURN ON INVESTMENT (ROI)	17.8
INTEGRATING MOBILE INTO EXISTING LEGACY SYSTEMS	16.4
CHOOSING A DEVICE AND PLATFORM	16.2
COST AND EXPENSE	7.4
SECURITY	3.6