
■ The Jigsaw24 Apple in business survey 2014: The results

February 2015

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■ Introduction

In 2013, we ran our first Apple in business survey, aiming to see what the barriers to and benefits of adoption were for businesses in Britain. After a year in which we've seen iPhone become supersized, iPad become quicker and the Mac Pro take on an entirely new shape, we thought it was time to review how our customers are using their technology.

What's different about this year's survey?

Given Apple's reputation as a creative platform, we also thought we'd reach out to creative businesses and see if their usage differs from those offering core services like manufacturing and retail. To that end, this year's survey was split into two tracks – one for core businesses, one for creative. The results are presented separately below.

The surveys were largely identical, but we added an extra section on content delivery for creative users, to see if the rise of tablets, smartphones and 'phablets' had any impact on the kind of content they were being asked to deliver, and how their customers want it optimised.

Who's answering the questions?

The survey was distributed to a database of our business and design and publishing customers. They were asked to self-define whether they worked for a core or creative company – 64.34% chose creative, while 36.43% chose core.

Of our core business respondents, 96.97% said they used Apple on a day to day basis, as did 96.92% of the respondents in creative companies.

The structure of the survey is explained in Appendix I on page 24.

Of our core business respondents, 96.97% said they used Apple on a day to day basis, as did 96.92% of the respondents in creative companies.

■ Apple use in core businesses

Executive summary

Which devices are being used for business? The majority of participants said that their smartphone was the most-used device in the workplace, despite the fact that the majority of smartphones were personally owned and only 27% of businesses surveyed have a formal bring your own device policy.

Laptops and tablets were both more likely to be used day to day than desktop computers, with 75%, 69% and 66% of participants using these devices in the workplace respectively.

What are these devices being used for? Mobile devices such as iPad and iPhone tend to be organisational devices, used for managing emails, contacts and calendars. Users in creative roles tended not to use mobile devices for creative work. Tasks such as email, internet browsing, spreadsheets and word processing were predictably common among users of desktops. Graphic design and video editing also ranked highly, reinforcing the perception of Mac computers as creative tools.

Perception of Apple devices 70% of Apple users agreed or strongly agreed that it was easy to integrate Apple products into their existing workflow. While the vast majority of users were aware that Mac computers could run virtual Windows desktops, over half thought that Mac computers could not run software needed by their business. However, respondents were generally confident that Mac computers could interface with their clients' systems.

The number of respondents who felt Mac computers were too expensive compared to PCs fell considerably, and most Apple users feel they would encounter little internal resistance to bringing more Apple devices into the business.

Barriers to adoption Two thirds of participants felt that confusion over whether Mac computers would work with clients' and colleagues' machines or mission-critical applications was a major concern when considering adopting Mac. Despite the reported quality of Mac support falling since the 2013 survey, users' confidence in their own technical knowledge of using and managing Apple devices has increased.

About the respondents

The majority of respondents work in IT or creative roles (22.22% and 19.44% respectively), with a further 13.89% identifying themselves as working in marketing roles and 11.11% acting as a director, CEO or general manager.

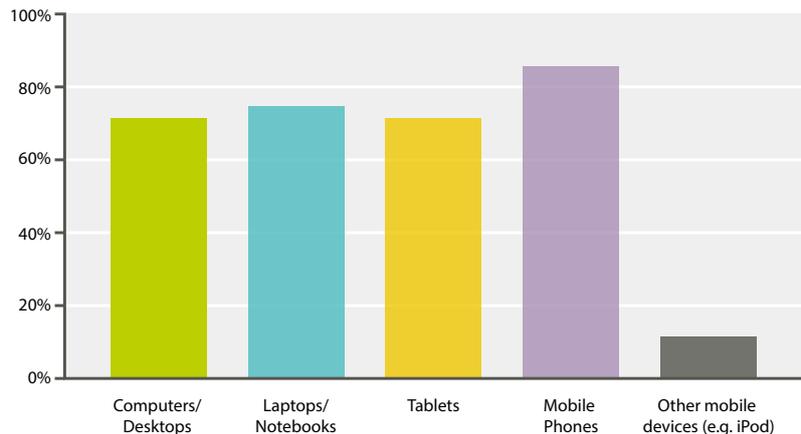
The most well-represented industries were service providers, manufacturing and wholesale/resale. 52.78% of companies had an in-house creative team, and 36.11% had fewer than ten employees. (22.22% had fewer than 50, 11.11% fewer than 200, and businesses with 201-500, 1001-5000 and 5001+ employees each made up 8.33% of the surveyed group.)

84.85% of those surveyed used smartphones daily. 69.7% used tablets every day.

Respondents were asked to select all devices that they used on a day to day basis. As the graph below shows, smartphones were by far the most used device, with 84.85% of those surveyed using them daily. 69.7% used tablets every day.

75.76% use laptops or notebooks. Perhaps surprisingly for a traditional business environment, only 66.67% of respondents said they use desktop computers on a day to day basis, making them the least common of all four devices.

Q8 What devices are people using day to day?



Who owns business devices?

48.48% of people use their own smartphone for business purposes, a slight increase on last year's 44.44%.

48.48% of people use their own smartphone for business purposes, a slight increase on last year's 44.44%. 30.3% use their own tablet. 27% use their own laptop and 9% use their own desktop (in all but one instance, these users worked in companies with fewer than ten employees).

However, 36.36% of those surveyed only used devices owned by their employer, and only 27% said their workplace had a formal BYOD policy that they were aware of.

In 2013, 39.68% of tablets were personally owned, a figure which fell to 30.3% this year, despite there being no significant increase in the number of companies offering BYOD schemes, suggesting companies are beginning to provide iPad as a formal business device. Perhaps the most significant change is the number of users using their own laptops, which rose from 17.46% in 2013 to 27.27% in 2014.

Individuals' perception and use of Apple products

Perception and use of Apple products

Q12 statements

1. It is easy to integrate Apple products into my workplace.
2. Apple products cannot run some of the software products we use in our workplace.
3. Windows-based systems interface better with our customers and suppliers than Apple-based products.
4. I would have resistance internally switching to or using more Apple-based products.
5. Most people in our office would rather have Apple-based products.
6. There are key synergies with existing Apple-based products when buying additional Apple-based products.
7. Apple IT products are too expensive compared to other Windows-based products.

This question was also put to non-Apple users, but as they only made up 3.03% of the sample surveyed, the results may not be particularly representative.

96.97% of respondents use an Apple device on a day to day basis – up from 90.91% in 2013. In a series of questions to investigate these participants' perception and use of Apple products, we asked them to what extent they agreed with a series of statements about Apple products.

It is easy to integrate Apple products into my workplace. Apple products cannot run some of the software products we use in our workplace.

70% of Apple users agreed or strongly agreed that it was easy to integrate Apple products into their existing workflow compared to 84% last year, although 56.67% also agreed or strongly agreed that Apple computers could not run software needed for their role. (Interestingly, in question 19, these same users were asked if they were aware that Mac computers could run Windows software, and 93.33% said yes, suggesting that wariness about Mac compatibility goes beyond users knowing their software is optimised for PC.)

Windows-based systems interface better with our customers and suppliers than Apple-based products.

While 33.33% of participants were unsure about the third statement, 'Windows-based systems interface better with our customers and suppliers than Apple-based products', 40% either disagreed or strongly disagreed. While this is perhaps a surprising result given that core businesses are historically considered a largely PC domain, it is consistent with last year's figures (also 40%) and is perhaps testament to Apple's popularity among consumers and prosumers. Only 6.67% strongly agreed with the statement.

I would have resistance internally switching to or using more Apple-based products. Most people in our office would rather have Apple-based products.

73.33% of participants disagreed or strongly disagreed that 'I would have resistance internally switching to or using more Apple-based products', which suggests that institutional support for Apple devices is high, and that they are seen to deliver strong ROI. Given this, the spread of responses to the fifth statement "Most people in our office would rather have Apple-based products", are unexpectedly even, with 26.67% strongly agreeing, 23.33% agreeing, 26.67% unsure and 20% disagreeing. Only 3.33% strongly disagreed.

Paired with the strong response to statement one (in which 70% of respondents thought Apple products were easy to integrate), we can assume that this resistance wouldn't be IT-based, but perhaps based on a reluctance to change and retrain staff, a high initial investment or the pervasive idea that Mac computers cannot run certain software, even in a virtual PC environment.

There are key synergies with existing Apple-based products when buying additional Apple-based products.

None of our Apple users strongly disagreed with the statement, “There are key synergies with existing Apple-based products when buying additional Apple-based products” and 70% agreed or strongly agreed. However, 23.33% were unsure, suggesting that there is a lack of knowledge about how to best link up different Apple devices, despite many respondents using multiple devices on a day to day basis.

Apple IT products are too expensive compared to other Windows-based products.

43.34% of Apple users agreed that “Apple IT products are too expensive compared to other Windows-based products” (down from 54.25% last year), while 33.34% disagreed and 23.33% were unsure. However, given the enthusiasm for taking on more Apple devices and the perceived lack of internal resistance, this does not seem to be a significant barrier to adoption once Apple is in the organisation (100% of our small sample of non-users agreed with this statement).

Which Apple devices are being used in business?

Of our core business respondents, 92.31% use iPhone for business, up from 86% last year – correspondingly, use of non-Apple phones fell from 11% to 7.69% this year. No participants reported that they did not use a smartphone.

79.17% use iPad for business, up from 77% last year, and the number of people not using a tablet device fell from 18% to 16%. The number of respondents saying they used a non-Apple tablet remained steady, suggesting that iPad is a popular choice for users new to tablet devices – perhaps due to the proliferation of iPhone.

73.08% of participants said they used MacBook notebooks, up from 67% last year. Correspondingly, the number reporting that they used a PC laptop or notebook fell from 32% to 23.08%, and those not using either rose from 1% of last year’s cohort to 3.85%.

A similar trend can be seen in desktop usage, with the number using PC desktops falling from 32% to 26.67%, although the number using Mac desktops rose slightly from 62% to 63.33%. Most interestingly, 10% reported not using desktop computers for work at all – double the percentage that said the same in 2013.

What are desktops being used for?

The most common tasks for desktop users are much the same as last year, with email, internet browsing, word processing and spreadsheets all in the top five. The popularity of graphic design (the second most frequently chosen task at 69.23% of users) and video editing (sixth, with 26.92%) even within core businesses conforms to the idea of Mac computers as a primarily creative tool.

Of our core business respondents, 92.31% use iPhone for business, up from 86% last year.

What are iPad and iPhone being used for?

Among the participants, the most popular tasks on iPad were managing emails (72.73%), internet browsing (68.18%), note-taking (54.55%), managing calendars (50% – compared to just 15.79% of respondents from the creative sector) and presentations (40.91%, as compared to just 28.95% in the creative sector).

Later in the survey, we asked participants to gauge how iPad was being used across the organisation as a whole. The results above were nearly mirrored, with email being a key use in 68.42% of cases, internet browsing scoring 63.16%, calendaring scoring 57.89% and presentations scoring 42.11%.

iPhone usage follows a similar pattern, with 80% of participants using it for email, 72% for internet browsing and 60% for calendaring. Surprisingly given the amount of publicity Apple's FaceTime service has received, only 16% of respondents reported that they use iPhone for video conferencing. Far fewer respondents were comfortable note-taking and word processing on their iPhone compared to their iPad (these tasks were performed by 28% and 4% of iPhone users respectively), while the popularity of managing calendars and contacts on iPhone rather than iPad suggests users do use the two for separate functions, and that iPad isn't seen as a 'giant iPhone.'

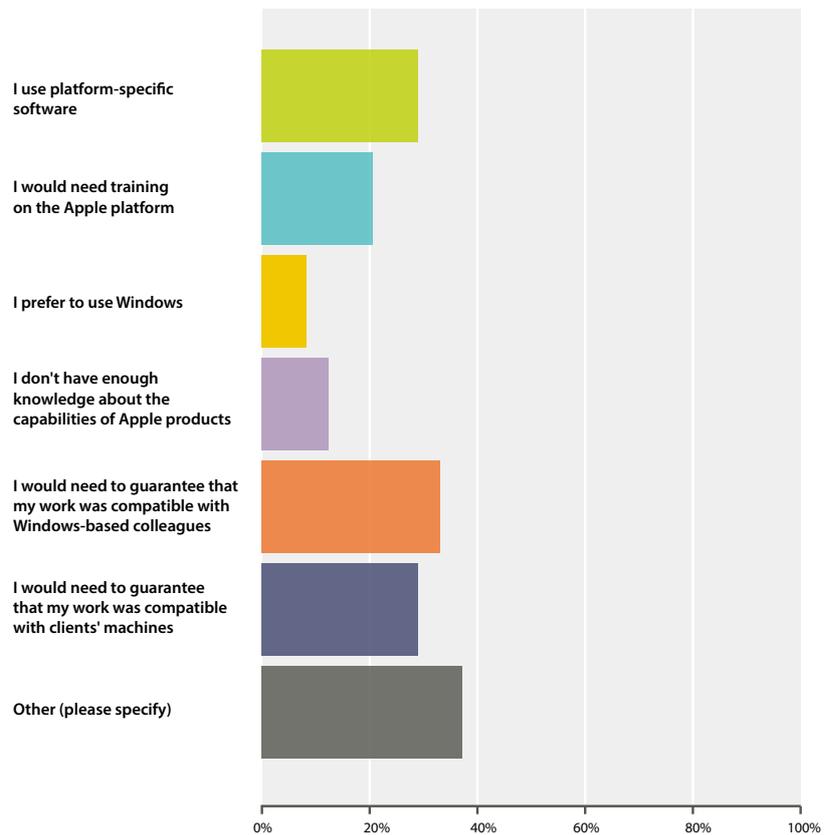
Do Apple products help you do your job better?

86.67% of participants agreed with this statement, compared to 96.43% last year. When asked to qualify their statements, participants were quick to cite the reliability and usability of Mac computers, the impression that they 'just work better than Windows' and are 'linked together so [I] don't miss communications and can share easily with other users.' The only negative comment noted a lack of support for OS X Server, resulting in it not performing as promised, but there were no negative comments about OS X as a platform for end users, or Mac workstations.

86.67% of participants agreed that Apple products help them do their job better, compared to 96.43% last year.

Perception and use of Apple in the business as a whole

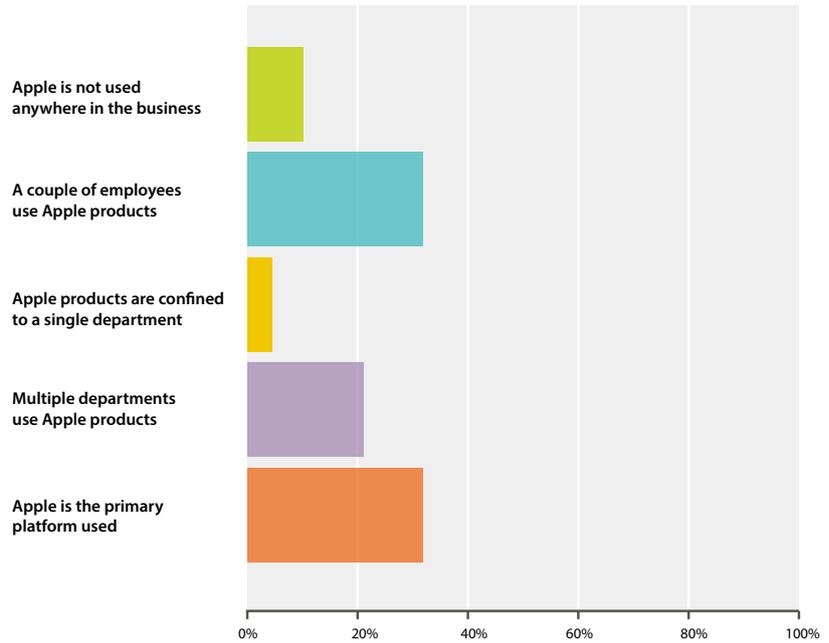
Q20 What are the barriers to Apple adoption?



When asked what they thought the barriers preventing their businesses from rolling out more Apple devices were, 33% of participants cited 'I would need to guarantee that my work was compatible with Windows-based colleagues' as their main concern, with 29.17% choosing 'I use platform-specific software' and 'I would need to guarantee that my work was compatible with clients' machines', despite over 93% saying they were aware that their Mac computers could run the Windows operating system and its apps.

Among the reasons listed in 'other' were arguments that financial software 'runs better on a native PC', hardware costs of Mac computers themselves and Mac servers. Only 12.5% said that they'd struggle to roll out Mac computers because 'I don't have enough knowledge about the capabilities of Apple products,' down from 25% in 2013, suggesting information about the business capabilities of Mac is beginning to penetrate corporate IT environments.

Q24 Where in the business are Apple devices used?



Despite the overall positive response to Mac computers in business, 32.14% of participants admitted that only ‘a couple of employees use Apple products’ in their business, although this obviously doesn’t extend to more personal devices such as iPhone and iPad.

53.43% said that Apple was their primary platform or that it was used across multiple departments, and only 3.57% said that Apple products were used in a single department (down from 10.94% last year), going against the traditional view of marketing departments as the lone Mac users in PC-dominated businesses.

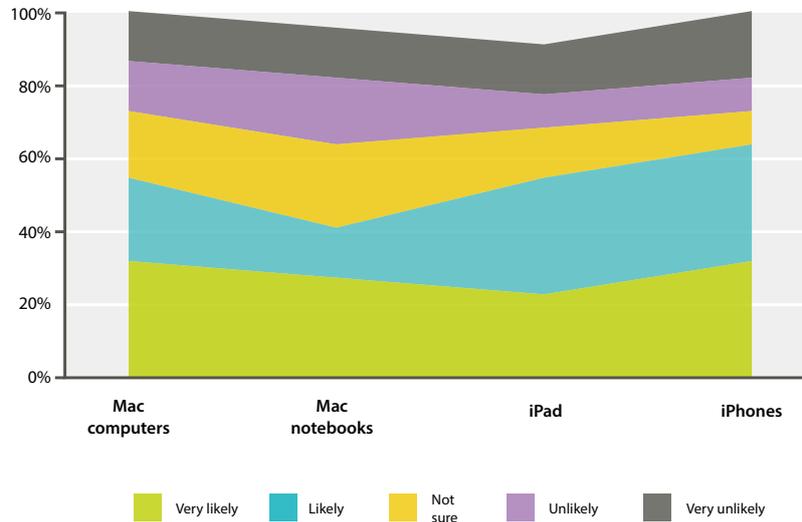
Customised apps and content

25% of companies surveyed had their own in-house app, compared with just 7% last year, suggesting that understanding of app development among corporates has increased over the past year, possibly aided by the increase in the availability of device management and deployment tools for Mac and iOS devices. However, 5% of users remain unsure whether their business has a custom app or not, which could indicate that end users are not aware of the extent to which corporate IT are controlling their devices, and the extent to which third party solutions are being used.

25% of companies surveyed had their own in-house app, compared with just 7% last year.

The future of Apple in the business

Q28 How likely are businesses to purchase more Apple products?

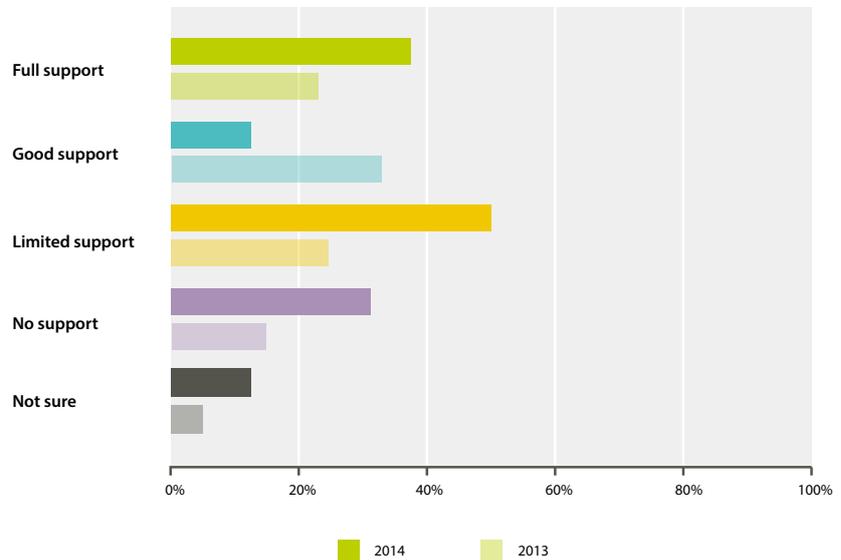


55% of participants thought their company was likely to increase the number of desktop Mac computers in their organisation, nearly a 10% increase on 2013's 46.67%. However, the percentage of respondents who think their company was going to purchase more Mac notebooks fell correspondingly – from 55.77% in 2013 to 43% in 2014, and 33.34% thought it was unlikely that their company would purchase more, compared to 27% of desktop users.

55% of respondents think it's likely that their company will purchase more iPad.

Paired with optimistic numbers for iPad (55% of respondents think it's likely that their company will purchase more), this could indicate a move away from notebooks as power users and mobile workers cluster around iMac and iPad. However, there's also a case to be made for device saturation; the number of people saying it's very unlikely that their company will buy any more iPhones has tripled in the past year, but with over 80% of respondents saying that they already use some model of iPhone, it could simply be that there's not high enough turnover within the company to demand any new devices.

Q29 How well supported are Mac computers?



The number of users reporting that they receive ‘Good support’ – for example, there is no formal programme in place to set up or troubleshoot Mac devices, but the IT staff does have the knowledge and ability to do this’ for their Mac computers has fallen sharply over the last year, from 32% to 8.7%. This seems to have been replaced by ‘Limited support – for example, the IT department has little experience with or knowledge about setting up or troubleshooting Mac devices but will try to help employees if they can’, which rose from 24% to 34.78%, and ‘No support’, which rose from 14% to 21.74%. Despite this, the number of people reporting ‘Full support’ also rose 4% across the year, from 22% to 26%.

This could mean that IT departments are leaving more of their Mac maintenance up to end users, whom they expect to be familiar with these devices given the prevalence of iOS (Apple themselves encourage a self-service support philosophy). However, it should also be noted that the 2014 sample skews toward slightly larger companies than 2013 sample, so the dip in the number of well-supported companies could be a result of fewer self-supporting Mac specialists being represented.

■ Apple use in creative businesses

Executive summary

Which devices are being used for business? In contrast to the business sector, over 90% of respondents still use a desktop computer as their day to day working device, although the vast majority combined this with a laptop or smartphone. Less than a third of companies have a formal bring your own device policy, but 65% of respondents reported using a personally owned device for work outside of formal business policy.

The few respondents who did not use Apple machines as their primary work device all worked in 3D animation or visual effects (VFX), where PC-optimised software dominates.

What are these devices being used for? As in the business sector, mobile devices were primarily used for organisation and productivity tasks, with the majority of creative work taking place on iMac or MacBook notebooks. However, 38% of respondents feel the amount of work they create on mobile devices has increased over the last 18 months.

Perception of Apple devices 79.03% of Apple users strongly agreed that 'It is easy to integrate Apple products into my workplace.' Apple machines are perceived as integrating well with back end systems, clients' systems and suppliers. Again, the percentage of respondents who knew that Mac computers could run Windows was extremely high, but there were concerns about Mac computers' ability to run role-specific PC software.

Almost 90% felt that they would not encounter internal resistance to using more Apple products, and the vast majority agreed that the synergy between OS X and iOS were beneficial.

Barriers to adoption Barriers were generally less pronounced than in the business sector, though Apple devices are still considered relatively expensive. While many users agreed that Apple was easy to integrate into their business and knew Mac computers could run Windows software, there were concerns that Mac computers could not run role-specific software and that it would be difficult and time-consuming to change platforms.

Mobile working and delivery 38.98% reported an upturn in the amount of content they've had to optimise for mobile devices over the last 18 months, and over half of respondents had increased the amount of content they delivered to clients and colleagues over the cloud. 41.37% agree that they are using more mobile applications than before, even if people are using them for organisational rather than creative work.

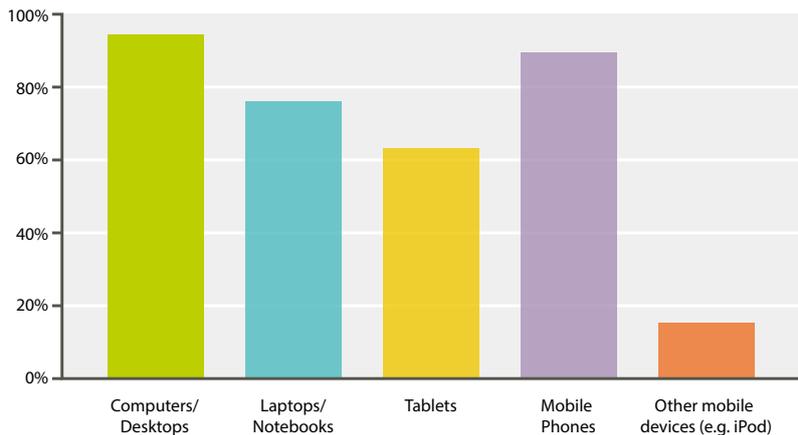
About the respondents

59.7% of our respondents in the creative sector worked in creative roles. When asked to define which medium they worked in, 82.5% said graphic design, 62.5% said print design, 75% said web design, 25% specified web development and 22.5% worked in video production, with minorities from audio, 3D animation, VFX and app development also present.

Among those respondents who did not work as creatives, marketing, purchasing, IT and general management were the most common job roles. The companies they worked for were most commonly design agencies (28.7%), production companies (13.64%) and architectural practices (13.64%).

68.18% of those surveyed worked in companies with fewer than five employees, 7.58% had between six and ten, 16.68% employed 11-50 people, 3.03% employed 51-100 people and 4.55% employed over 500.

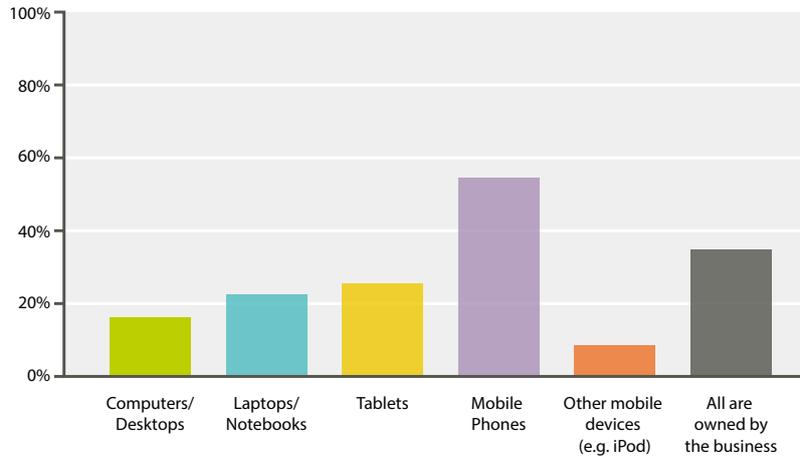
Q40 What devices are people using day to day?



Desktop computer use is far higher in the creative sector than in core businesses, with 93.85% of respondents using desktop computers every day.

Unsurprisingly, desktop computer use is far higher in the creative sector than in core businesses, with 93.85% of respondents using desktop computers every day – more than use smartphones every day (89.23%). 75.38% use laptops or notebooks, and 63.08% use tablets on a daily basis.

Q41 Who owns business devices?



Despite the high penetration of mobile devices like smartphones and tablets, only 29.23% of those who answered thought their company had a formal BYOD policy.

Despite the high penetration of mobile devices like smartphones and tablets, only 29.23% of those who answered thought their company had a formal BYOD policy. However, only 35.38% of people only used devices owned by their employer, suggesting that personal devices are being used outside of formal IT policies.

Looking at which devices are most likely to be personally owned, we can see that over half of respondents (55.38%) use their own phone for business, 26.15% use their own tablet and 23.08% provide their own laptop or notebook. 16.92% use a personally owned desktop computer for work (again, this figure is far higher than that for core businesses), but all these were from companies with five or fewer employees, suggesting these respondents were likely to be freelance or self-employed.

Individuals' perception and use of Apple products

Q4+ statements

1. It is easy to integrate Apple products into my workplace.
2. Apple products cannot run some of the software products we use in our workplace.
3. Windows-based systems interface better with our customers and suppliers than Apple-based products.
4. I would have resistance internally switching to or using more Apple-based products.
5. Most people in our office would rather have Apple-based products.
6. There are key synergies with existing Apple-based products when buying additional Apple-based products.
7. Apple IT products are too expensive compared to other Windows-based products.

Perception and use of Apple products

96.92% of participants use Apple devices on a day to day basis – a very similar figure to the percentage of users in core businesses (although as an Apple reseller, we probably have a biased sample of businesses). The 3.18% who did not use Apple products on a daily basis all worked in 3D animation or VFX, areas where PC-optimised software dominates.

In a series of questions to investigate these participants' perception and use of Apple products, we asked them to what extent they agreed with a series of statements about Apple products.

It is easy to integrate Apple products into my workplace. 79.03% of Apple users strongly agreed that 'It is easy to integrate Apple products into my workplace', with a further 12.9% agreeing and only 3% disagreeing (100% of our small sample of non-Apple users answered that they were not sure, suggesting that there isn't widespread knowledge of integration best practice among non-users).

Apple products cannot run some of the software products we use in our workplace. Windows-based systems interface better with our customers and suppliers than Apple-based products. Despite all being Apple users, only 39% of respondents agreed that 'Apple products cannot run some of the software products we use in our workplace', compared to 67% who disagreed. However, 66% disagreed that "Windows-based systems interface better with our customers and suppliers than Apple products" while 100% of non-Apple users agreed, suggesting that Mac and PC users tend to be working in isolation from each other, and that certain processes or practices are still strongly associated with one platform, despite 98.33% of participants being aware that Mac computers can run Windows and PC software.

I would have resistance internally switching to or using more Apple-based products. Most people in our office would rather have Apple-based products. Only 5% of respondents agreed that 'I would have resistance internally switching to or using more Apple-based products', with 62.3% strongly disagreeing and 26.23% disagreeing. As you might expect from this, 76.67% of respondents agreed that 'Most people in our office would rather have Apple-based products'.

There are key synergies with existing Apple-based products when buying additional Apple-based products. 84% agreed that 'There are key synergies with existing Apple-based products when buying additional Apple-based products', suggesting that many of the companies surveyed encourage employees to work on multiple devices.

Apple IT products are too expensive compared to other Windows-based products. Much as in the business sector, 44% of participants agreed that, 'Apple IT products are too expensive compared to other Windows-based products', but this does not seem to have been a barrier to adoption, and 33% of respondents actually disagreed with the statement, with 23% unsure of the relative cost of Mac.

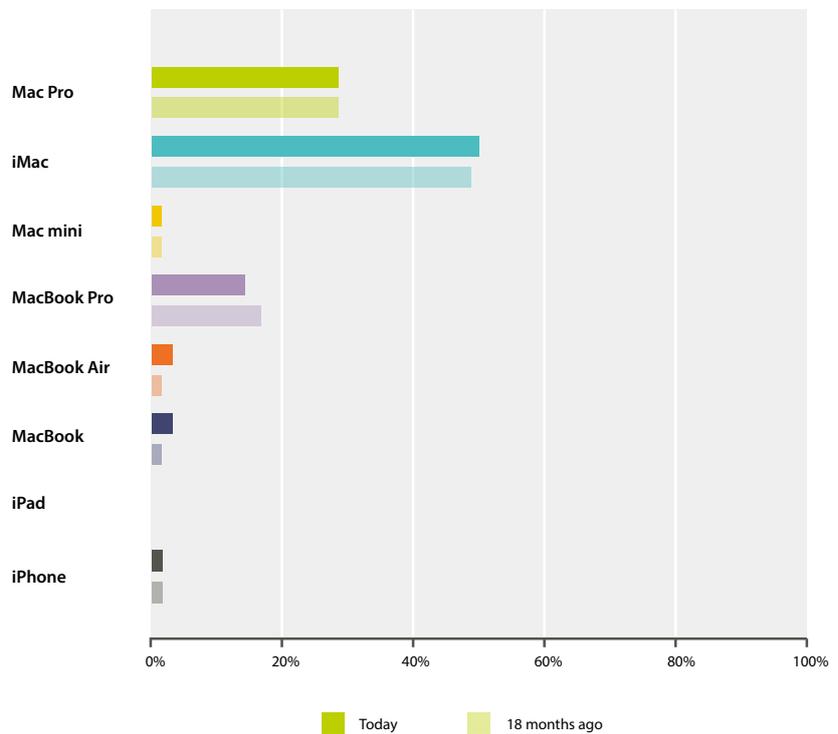
Q58 Do you think Apple products help you do your job better?

94.92% of respondents felt that Mac computers helped them do their job better. By far the most popular reason for this was 'ease of use' or that Mac computers were intuitive, with one user explaining that: "I don't feel 'on edge' with Mac like I did using Windows. The filing system feels much better and more secure [...] I feel much more comfortable and safe working on Mac." Ease of integration with backend systems and between different Apple devices was also cited as a major benefit.

Perception and use of Apple in the business as a whole

Q46 Which Apple devices are being used in business?

Given the long refresh cycle of the last generation of Mac Pro and the subsequent shift toward using iMac or PC workstations such as HP's Z400 series, and the increasing power and resolution of the MacBook Pro range, we wanted to see which devices creative users were working on, and if their primary work device had changed.



50.82% of people use iMac and Mac Pro maintains a respectable 27.87% share, with notebooks accounting for 18%.

The obvious lead here is the all-in-one iMac, with 50.82% of the vote. Mac Pro maintains a respectable 27.87% share, with notebooks accounting for 18% of the vote, including one user who was still holding tight to a 2009 MacBook. iPhone was only the primary device for 1.64% of users, and as yet no-one uses iPad as their primary work device.

Asked what device they primarily used 18 months ago (mid-2012), participants' answers were remarkably similar. While the number of users on Mac Pro, MacBook Air and Mac mini remained the same, with only ten participants changing devices in that time. Interestingly, there is an even split between users who moved up a device class (eg from iMac to Mac Pro, or MacBook to MacBook Pro) and those who downsized their setup (eg from Mac Pro to iMac).

What are desktops being used for?

Mac Pro and iMac remain the most popular desktop devices, with 27.87% and 54.1% of participants naming them as their work devices respectively. As in the business sector, the most popular task is emailing, with 81.13% of users preferring to send from their desktop Mac.

69.81% of participants used their Mac computers for graphic design, a very similar number to those in the business sector, further supporting the idea that Mac computers are typically confined to creative departments. However industry-neutral tasks like internet browsing (52.83%), word processing (41.51%) and spreadsheets (26.42%) also scored highly, beating out specialist uses like video and audio editing or app development. CAD, an area traditionally dominated by PC software and hardware, was a popular choice among respondents who answered 'Other, please specify', racking up 11% of the vote.

What are desktops and notebooks being used for?

21.31% of users said they don't use laptops or notebooks regularly for work. Among those who did, MacBook Pro was understandably the most common laptop choice, with 45.9% of those who use a laptop choosing this more powerful model. 14.75% of users have upgraded to MacBook Pro with Retina display, with the rest split evenly between MacBook Air, older MacBooks and PC laptops.

As on desktops, the most common task was managing emails (65.85%), followed by internet browsing (41.46%), graphic design (39.02%), word processing (34.15%) and spreadsheets (24.39%).

What are tablets and smartphones being used for?

59.02% of participants stated that they used an iPad for work, with 4.92% preferring Android tablets and the remainder not using any tablet device. Here, emails and internet browsing were by far the most popular results, both tasks being performed by 71.05% of users. All other tasks were relatively unpopular, with the third most popular, presentations, only performed by 28.95% of users.

However, the percentage of respondents using iPad for organisational tasks such as managing contacts, calendars and Skype or video conferencing was comparable to the percentage who performed those tasks on a laptop but significantly lower than the percentage who performed them on a desktop. This could imply that iPad is currently seen as an extension of users' laptops rather than as a tool with its own unique uses, and appeals more to people who are already used to mobile working.

85.25% of participants use an iPhone for work, with 8.2% choosing an Android device, 1.64% using an alternative platform such as Blackberry or Windows Phone, and a further 8.2% saying they do not use a smartphone for work. By far the most common smartphone tasks were managing emails (85.45% of users), internet browsing (54.55%) and personal calendaring (41.82%). Only 16% of users felt the need to use the other column to point out that they still used their smartphone for calls and texts.

59.02% of participants stated that they used an iPad for work, with 4.92% preferring Android tablets.

Mobile devices and content creation

As newer and more powerful mobile devices are released, more and more major software vendors are producing iOS apps. In order to see what kind of takeup these have seen in the creative sector, we asked participants how the amount of work they created on mobile devices has changed over the last 18 months, and what kind of applications they used to create it.

13.33% of respondents felt that the amount of work they created on mobile devices had increased significantly over the last 18 months. 43.33% reported no change.

How much work is created on mobile devices? Only 13.33% of respondents felt that the amount of work they created on mobile devices had increased significantly over the last 18 months, though 25% felt it had increased slightly. 43.33% reported no change in the amount of work they created on mobile devices.

Does this predict a future trend? While one reading of these figures is that use of mobile devices for creative work remains relatively stable, it is worth noting that only 1.67% of respondents reported any kind of decrease in their use of mobile devices. This could mean that those who are reporting increased usage are in fact early adopters, and we can expect to see a continuing upward trend in mobile device usage for creative work.

What apps are people using? Of the major vendors participants reported using on their iPad and iPhone, Adobe apps were the most popular – possibly because their offering spans the sector. Vectorworks and building information modelling (BIM) tools also rated highly, which is to be expected given BIM's emphasis on uniting project workers from different sites, roles and devices.

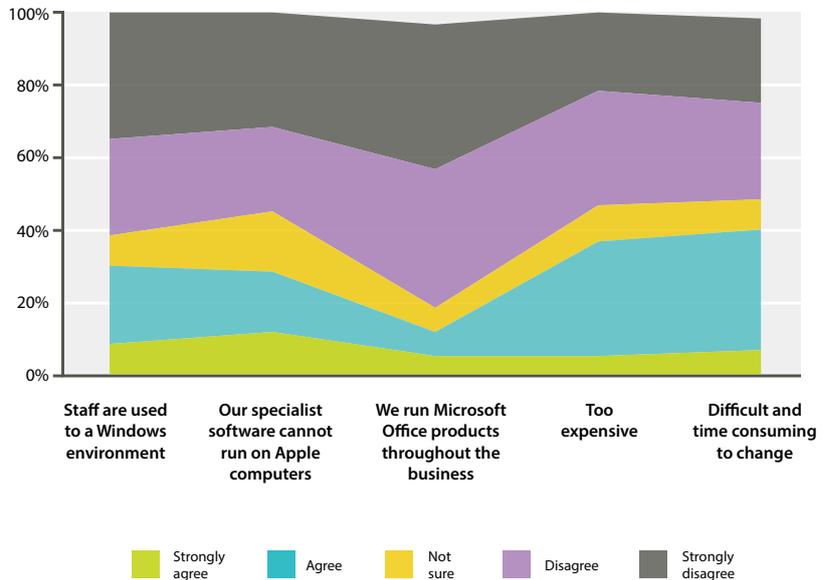
By far the most commonly used tools were Apple's iWork and Microsoft Office apps that had been ported to iOS, but other organisational apps that made an appearance included project management tools like Projectplace and Slack, the iOS version of Mac FTP solution Transit, and note-taking tools like Keynote and Evernote. Multiple users said that they 'rarely create things on iPhone' but transfer files to iOS devices from their desktop in order to tweak and review, or use it for project organisation and correspondence while creating the main deliverable on a more powerful desktop or laptop.

Barriers to Mac adoption

Here are some statements people have made about why they do not use Mac computers in the workplace.

1. Staff are used to a Windows environment.
2. We need specialist software which cannot run on Apple computers.
3. We run Microsoft Office products throughout the business.
4. Apple IT products are too expensive compared to other Windows-based products.
5. It would be difficult and time-consuming to change.

We showed all the participants a list of statements people had made about why they did not use Mac computers, and asked them to rate how strongly they agreed or disagreed.



Staff are used to a Windows environment. Of our participants, only 30% agreed that 'staff are used to a Windows environment', with 61.67% disagreeing and 8.33% unsure.

We need specialist software which cannot run on Apple computers. 28.34% agreed that 'we need specialist software that cannot run on Apple computers' – surprising given the number of participants who said they were aware that Mac computers could run Windows software, and potentially highlights continuing concerns about the power and reliability of virtual PCs. We saw comparable results when a similar question was put to core business users, suggesting that even PC users in Mac-dominated fields have the same concerns as those in more traditional environments.

We run Microsoft Office products throughout the business. Only 12.7% of participants agreed that Microsoft Office use was a key barrier to adoption, with 80.96% disagreeing, which could indicate a high level of awareness around Office for Mac, or mean that our creative users are using iWork or third party tools to perform everyday tasks.

Apple IT products are too expensive compared to other Windows-based products. 40.68% of creative users agreed that the perceived cost of Apple machines was a barrier, very similar to the 43.34% who agreed in the core business sector. However only 10% of creative users were unsure compared to 23.33% of business users, and the percentage who disagreed that Apple were overpriced was 53.34% to the business sector's 23.33%, suggesting that creative users are more likely to perceive the benefits of Mac computers as weighing out the costs, or at least have done their TCO research.

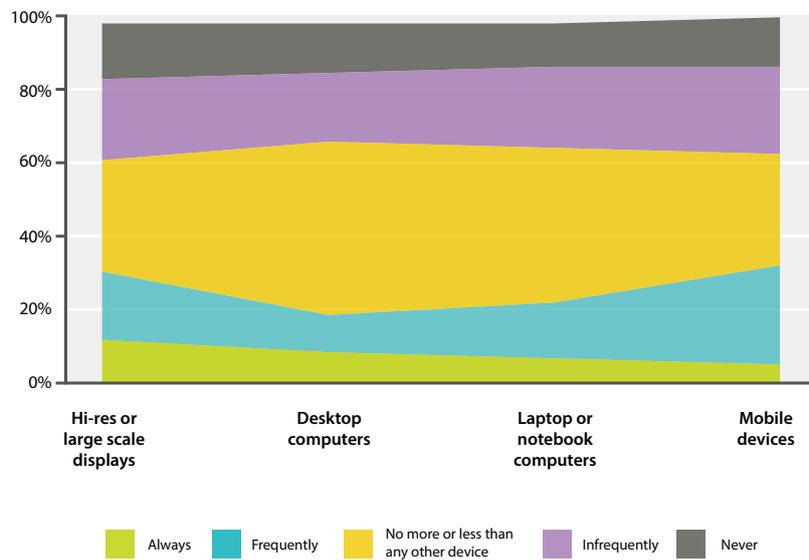
It would be difficult and time-consuming to change. 40.68% thought it would be 'difficult and time consuming to change' while 50.85% disagreed, despite the fact that earlier in the survey 91.92% agreed that 'It is easy to integrate Apple products into my workplace.'

The future of Apple in the business

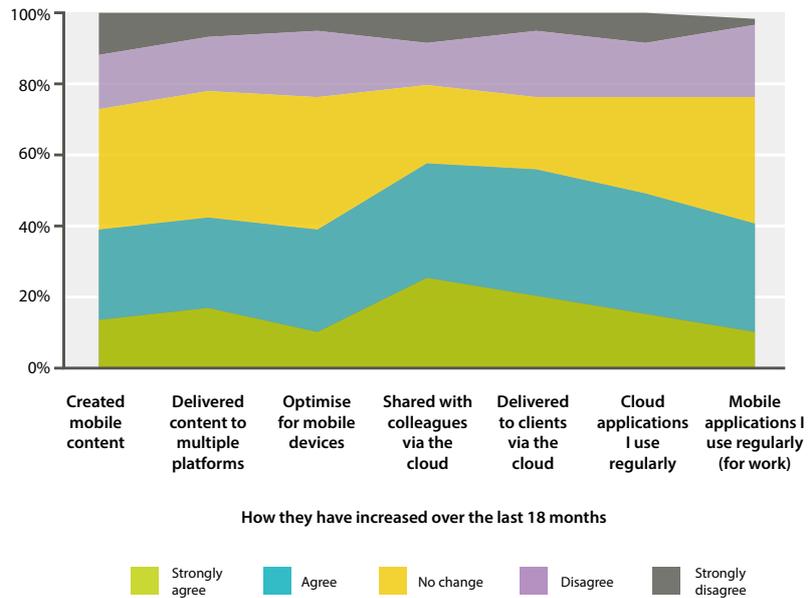
Delivering to clients

Having asked them about their use of Apple devices in-house, we then wanted to find out which devices our respondents used when interacting with clients.

When asked, 'When meeting with or presenting to clients, which of the following do you commonly use?', 64.41% of respondents predictably used laptops. However, iPad was the second most popular option, with 44.07% of the vote. Apple TVs and smartphones were both overlooked as presentation tools, being used by just 6.78% of respondents each.



Of the companies surveyed, 31.04% are frequently asked to optimise content for large scale displays, 18.96% are frequently asked to optimise for desktops, 22.42% for laptops and 32.2% for mobile devices. However, in every category the most popular option was 'I am not asked to optimise for this device more or less than any other', so we can conclude that the predicted consumer exodus to tablets and touchscreens hasn't quite happened yet.



This trend continued when we asked participants about their use of mobile services such as cloud storage, with a significant proportion reporting no change in each field.

That said, 43.37% agreed that their company had taken on more multi-platform projects over the last 18 months, and 38.98% reporting an upturn in the amount of content they've had to optimise for mobile devices.

Cloud delivery has seen the most significant increase, with 56.62% agreeing that they use cloud services more frequently than they did 18 months ago.

Cloud delivery has seen the most significant increase, with 56.62% agreeing that they use cloud services to share content with colleagues more frequently than they did 18 months ago, and 55.93% agreeing that they deliver more work to clients via the cloud than before. A further 49.15% agree that they are using more cloud applications now than they were 18 months prior to the survey, and 41.37% agree that they are using more mobile applications than before, even if previous answers have shown that they're unlikely to be using them for creative work.

■ Appendix I: Survey structure

The survey was distributed via an email marketing campaign to customers and prospect contacts on the Jigsaw24 database. Participants were invited to fill in a series of questions that were hosted on SurveyMonkey.com, with an incentive to win a £100 voucher. Participants were asked to identify themselves via name and email address (both required questions) for entry into the competition, but were not asked to identify the company they worked for or other contact details.

The survey was split into two parts, one for creative businesses and one for businesses offering core services. Question one asked participants to self-report which sector they worked in. Participants were then directed onto separate tracks depending on which sector they were in.

For core businesses

- **Questions 2-10** asked participants to identify themselves and their role in the business.
- **Question 11** asked if the participant used Apple products day to day – those who answered yes and no would be split onto two separate tracks.
- **Questions 12 – 19** asked Apple users about their perceptions and day to day use of Apple hardware.
- **Questions 20 – 23** asked non-Apple users about their business's perception of Apple hardware.
- **Questions 24 – 30** asked participants about the use of Apple in their business as a whole.
- **Questions 31 – 33** were included for market research purposes.

For creative businesses

- **Questions 2-10** asked participants to identify themselves and their role in the business.
- **Question 11** asked if the participant used Apple products day to day – those who answered yes and no would be split onto two separate tracks.
- **Questions 12 – 25** asked Apple users about their perception of and day to day use of Apple devices, with additional questions about how their use of mobile devices for content creation had increased that did not appear in the core business survey.
- **Questions 26 – 30** asked non-Apple users about their business's perception of Apple hardware.
- **Questions 31 – 37** asked participants about the use of Apple in their business as a whole.
- **Questions 38 – 41** asked about changes in the ways participants had been asked to deliver to clients over the past 18 months.
- **Questions 42-44** were included for market research purposes.

■ Appendix II: Resources

How much do Mac computers really cost? (August 2014)

7 things to consider if you're all about price.

Read more: <http://bit.ly/1AraiuM>

iOS apps in business whitepaper (August 2013)

This document provides a top-level overview of all aspects of iOS app procurement, development, distribution and lifecycle management.

Read more: <http://bit.ly/1zsof9n>

The myths of Mac (September 2013)

Can the Mac be considered a genuine business alternative to Windows-based desktops and laptop computers?

Read more: <http://bit.ly/1Ac9Odh>