Good ⬕ GOOD TECHNOLOGY™ MOBILITY INDEX REPORT Q2 2014

Report on App, Platform and Device Preferences from the Leader in Secure Mobility

This report is part of the Good Technology™ Mobility Index, an ongoing initiative to track and analyze the impact of mobile apps and platforms. This document presents the details of the Good Mobility Index and the methodology behind it.

With a diverse global customer base that includes FORTUNE 100™ leaders in commercial banking, insurance, healthcare, government, and aerospace and defense, Good is uniquely positioned to provide insight into the adoption of new mobile apps, platforms and devices. Leveraging data collected from our extensive customer base using Good for Enterprise® or the Good Dynamics® Secure Mobility Platform, Good is reporting on enterprise mobile application adoption in addition to device activations.

EXECUTIVE SUMMARY

In this quarter's Mobility Index Report, we continue to see organizations across industries progress along the mobile maturity curve and adopt a true 'platform' approach. Leveraging secure mobile enterprise applications, organizations are securely delivering critical but sensitive data to their employees, customers and partners and realizing the tremendous business benefits of doing so. From customer relationship management (CRM) to business intelligence to secure instant messaging, organizations are mobilizing business processes by moving away from legacy desktop apps and reinvesting those resources into building and deploying secure app-to-app workflows.

A recent report from Forrester notes that 70% of enterprises see providing more mobile support to employees over the next 12 months as a high or critical priority.[1] In addition, the report states, "In the very near future, technology management professionals must provide access to a host of corporate applications such as CRM, BPM, and HR. This is already evident, as we see more spending shift to software for mobile applications and middleware as well as the necessary management solutions to provision and manage mobile applications. At the end of the day, we may talk about mobile devices, but in reality it's all about the apps."

[1] Forrester: The State Of Enterprise Mobile Security, Q1 2014: Strategies Shift From Devices To Apps.

OVERALL HIGHLIGHTS:

Enterprise app activations shifted this quarter with Android apps claiming 12 percent of total activations, taking four percentage points of share from iOS.

Document editing continues to maintain the top spot for most widely-used enterprise app, but secure instant messaging (IM) edged out custom apps as the third most activated app category this quarter.

This quarter recorded significant growth in secure instant messaging apps, maintaining its lead as the top app for smartphones.

Custom app activations continued their streak of double digit growth quarter over quarter, recorded at 25 percent from Q1 to Q2.

After dropping last quarter, business intelligence regained its spot as the up and coming app, with over 200 percent growth in total activations quarter over quarter. This is a testament to the more advanced app-to-app workflows organizations are deploying to mobilize business processes.

Customer relationship management (CRM) looks to be the next fast rising star, with the total activations of this app category increasing by a factor of seven quarter over quarter. Much of this growth can be attributed to the introduction of Good for Salesforce1 in late Q2.

Overall, enterprise application activations continued to see significant double digit growth, increasing 20 percent quarter over quarter.

OS HIGHLIGHTS:

Android device activations jumped significantly quarter over quarter, increasing five percentage points to 32 percent of total activations, while iOS activations decreased that same amount and recorded 67 percent of total activations.

iOS enterprise app activations do continue to have a stronghold with 88 percent of total app activations this quarter. However, this is a four percentage point drop from last quarter, with Android recording 12 percent of enterprise app activations.

DEVICE TYPE HIGHLIGHTS:

In Q2, the gap seen in previous quarters in the number of tablet app activations versus smartphone activations significantly closed, coming in at 58 percent and 42 percent respectively.

Top three tablet apps activated. Maintaining the streak for six quarters, document editing, document access and custom apps made up the top three app categories activated across tablets in Q2. This demonstrates the primacy of tablets as a platform for document editing and document access.

Top three smartphone apps activated. For the second quarter in a row, secure instant messaging fell in the top three most activated smartphone apps this quarter, followed by document access and custom apps.

INDUSTRY HIGHLIGHTS:

Financial services, business and professional services, manufacturing and high tech all recorded a significant bump in activations quarter over quarter.

Government and public sector recorded an increase of five percentage points in total iPad activations.

DETAILED FINDINGS

Good Technology analyzed both the mobile apps and devices activated by its customers over the second quarter of 2014 to highlight trends in mobility, app and device preference.

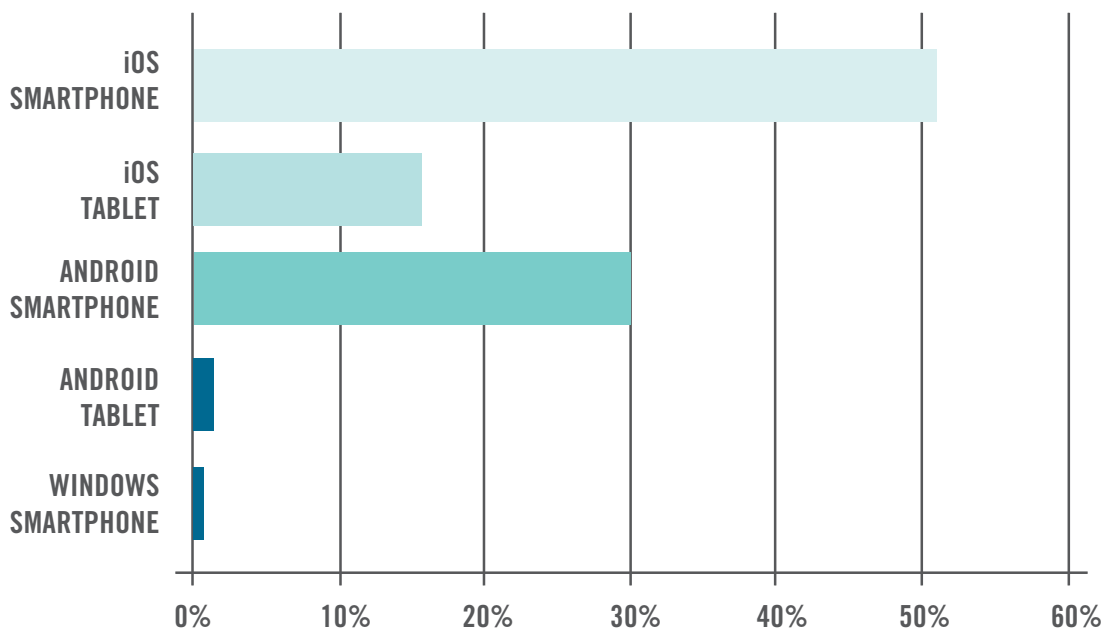## Net Activation by Platform Q2 2014: April thru June

Total Android device activations increased five percentage points from Q1 to Q2, and came in at 32 percent of total activations this quarter. Total iOS activations decreased the same number of percentage points and made up 67 percent of total device activations in Q2.

Windows Phone activations remain consistent with the five previous quarters and made up one percent of total device activations.
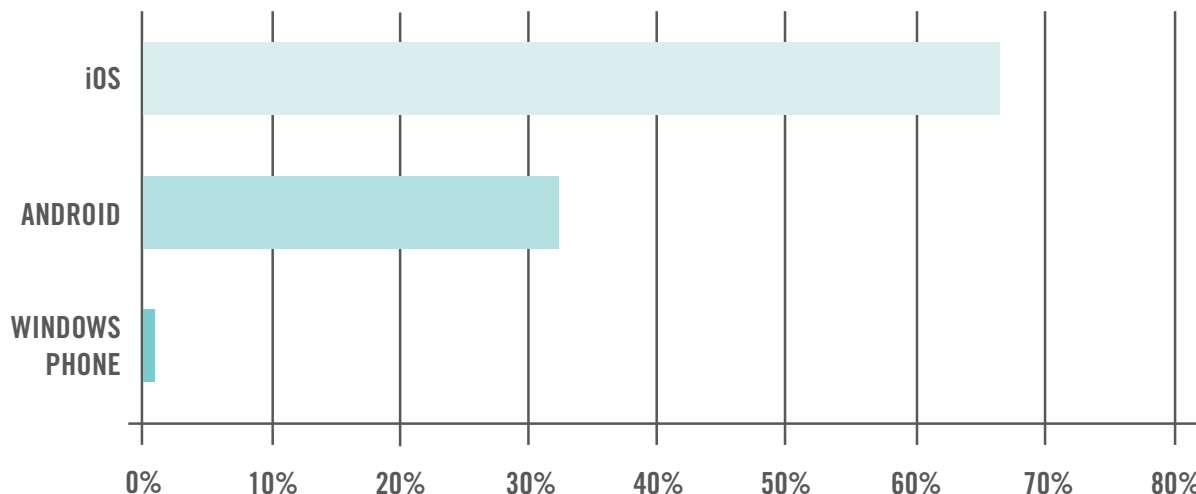
Net Activations by Type of Device Q2 2014: April thru June

In Q2, Android smartphone activations saw the largest increase of four percentage points quarter over quarter and came in at 30 percent of total device activations. iOS smartphone activations remained consistent quarter over quarter at 51 percent of total activations, while iOS tablet activations saw a slight decrease, coming in at 16 percent of total activations this quarter.
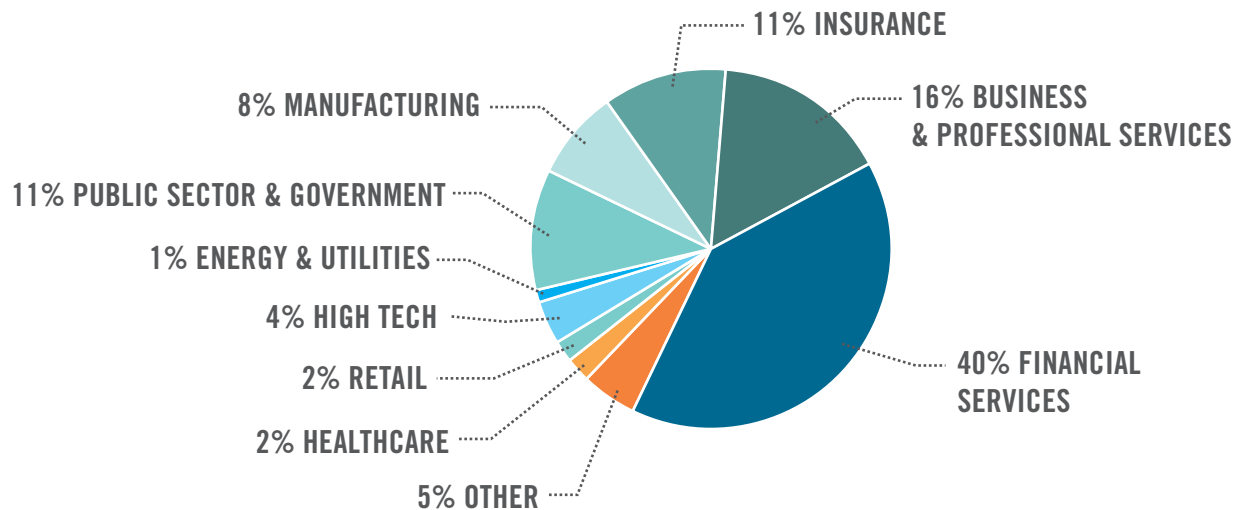
Net Activations by Industry Q2 2014: April thru June

This quarter, there was a bump in device activations in financial services, business and professional services and manufacturing.

11% INSURANCE

11% MANUFACTURING

23% BUSINESS
& PROFESSIONAL SERVICES

7% GOVERNMENT
& PUBLIC SECTOR

6% HIGH TECH

2% RETAIL

2% ENERGY & UTILITIES

2% HEALTHCARE

32% FINANCIAL SERVICES
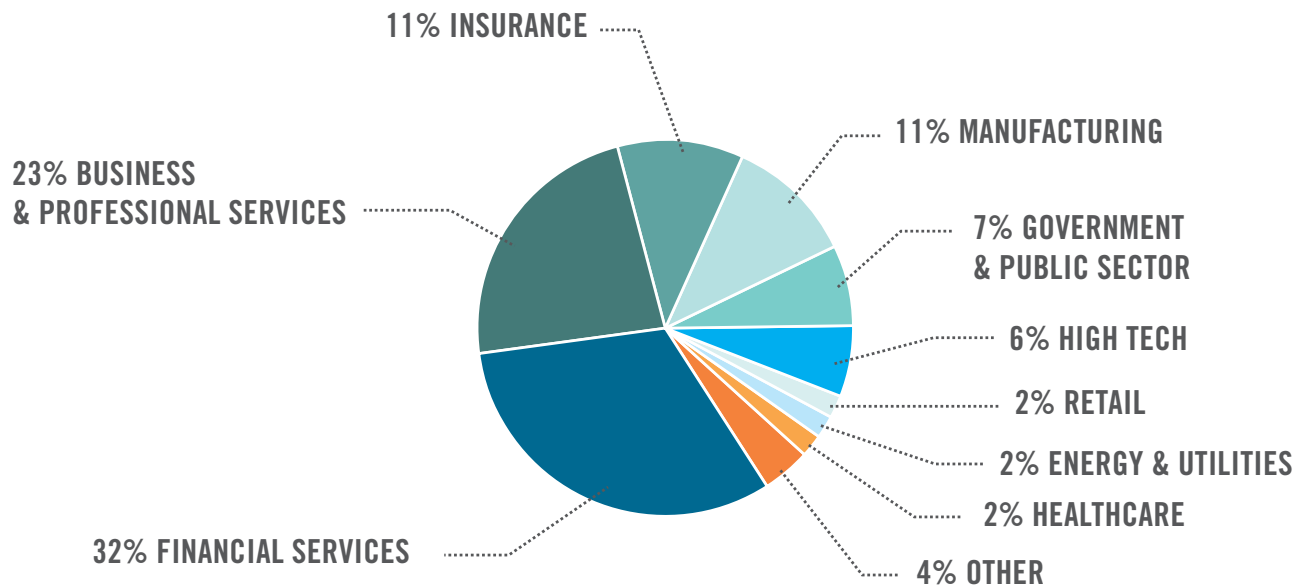
4% OTHER

iPad Activations by Industry Q2 2014: April thru June

This quarter, there was a significant increase in total iPad activations across Financial Services and Government and Public Sector. Other industries listed reported consistent percentages of iPad activations quarter over quarter.

11% INSURANCE

16% BUSINESS
& PROFESSIONAL SERVICES

8% MANUFACTURING

11% PUBLIC SECTOR & GOVERNMENT

1% ENERGY & UTILITIES

4% HIGH TECH

2% RETAIL

2% HEALTHCARE

40% FINANCIAL
SERVICES

5% OTHER

Tablet Activations Q2 2014: April thru June

While still maintaining a stronghold overall, iOS tablet activations saw a slight decrease this quarter and came in at 90 percent of total activations. Android tablet activations recorded 10 percent of total activations.
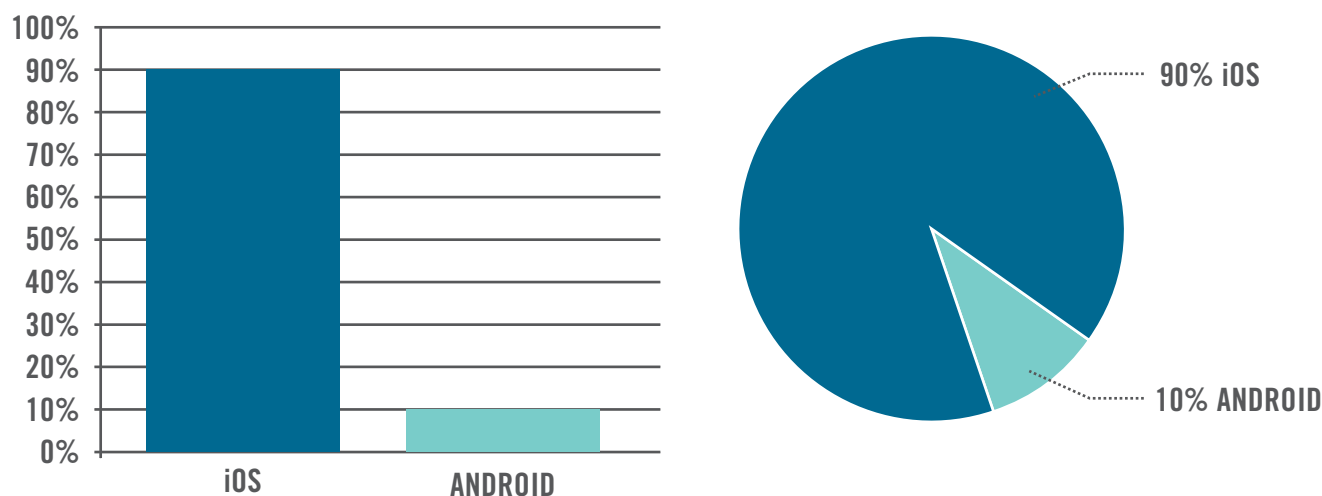
OVERVIEW OF GOOD MOBILITY INDEX METHODOLOGY

The metrics cited in this report have been directly generated from Good's internal data, as aggregated from all devices activated across Good's worldwide customer base in Q2 2014. Good analyzed activations, by month, among all its global customers that had at least five activated devices over the quarter, to draw conclusions on the overall trends for net new activations across iOS®, Android® and Windows Phone® platforms. Analyzing the long tail of net new device activations by platform provides unique insight into not only the popularity of individual devices and form factors, but also the platforms that enterprises prefer for enabling employees to access business data and applications. Due to the fact that RIM devices use only the BlackBerry® Enterprise Server for corporate email access, Good does not have insight into BlackBerry handset activation trends; and they are not reflected in this report.

ABOUT GOOD TECHNOLOGY

Good Technology is the leader in secure mobility, providing the leading secure mobility solution for enterprises and governments worldwide, across all stages of the mobility lifecycle. Good's comprehensive, end-to-end secure mobility solutions portfolio consists of a suite of collaboration applications, a secure mobility platform, mobile device management, unified monitoring, management and analytics and a third-party application and partner ecosystem. Good has more than 5,000 customers in 184 countries, including more than 50 of the FORTUNE 100™ companies. Learn more at www.good.com.