

## 2008 Mobile Trust Survey Report

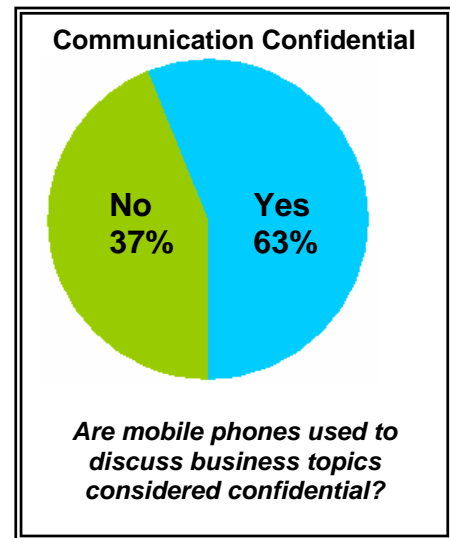
***This survey report provides an analysis of the demand for secure cellular/mobile communications, and sheds light on responses by organization type. It is based on an independent survey of IT professionals and identifies trends in the mobile secure voice market.***

### *Summary:*

The broad-scale acceleration of mobile and smartphone use within commercial enterprises, government organizations and social environments continues to trigger awareness and concern for fraud, privacy concerns, corporate espionage and terrorism on mobile phone networks.

From eavesdropping to the rise of more sophisticated attack techniques, confidential communication is more exposed than ever. *The Mobile Trust Survey* gauges awareness levels, market perceptions, and identifies top-level trends that gain insight into the secure voice imperative and the demand for solutions.

Survey findings reveal: Large, highly-distributed, multi-national corporations and government organizations are among the first to take steps to adopt secure mobile voice solutions.



**Analysis by organization type:** A year-to-year analysis of data by respondent organization type provides deeper insight into awareness and adoption patterns. Large and medium-sized enterprises continue to be among the early adopters of secure mobile voice communications. Small enterprises remain interested and aware of the secure voice imperative, but survey analysis shows more active and planned deployment among large and medium-sized enterprises. Following is a breakdown:

**Large enterprise focus** (more than 5,000 employees): Eighteen percent of surveyed large enterprise respondents have either deployed or are planning to deploy a secure voice solution. This year as well as last year, 55 percent of all large enterprise respondents said they would be interested in a secure voice option the next time they buy a mobile phone.

**Midsize enterprise focus** (between 1,000 and 5,000 employees): The number of midsize enterprise respondents who have either deployed or are planning to deploy a secure voice solution, rose to 21 percent in 2008. Sixty-two percent of midsize enterprise respondents said they would be interested in a secure voice option the next time they purchase a mobile phone.

**Small enterprise focus** (organizations with under 1,000 employees): Just 11 percent of small enterprise respondents had deployed or were considering deploying a secure voice option. Thirty-seven percent (up 9% from the previous year) who had not deployed would consider doing so if it were easy and cost-effective. More than half of all small enterprise respondents said they would be interested in a secure voice option the next time they purchase a mobile phone.

**Government organizations:** Fifteen percent of government organization respondents have already deployed or are considering deploying a secure voice option, while 48 percent would consider doing so if it were easy and cost-effective.



*Overall findings:*

Concern for the increasing risk and exposure of confidential communications on 'untrusted' networks is the fundamental driver behind the growing demand for secure voice solutions.

What's triggering awareness and driving the demand for secure mobile voice communication? Mobile phones are easy to acquire and use, highly ubiquitous and essential to on-demand communication. Yet communication over mobile phones remains exposed to the threat of corporate espionage, eavesdropping and terrorism.

The *2008 Mobile Trust Survey* found nearly 40 percent of all respondents reported being aware of compromises to voice communication on mobile/cellular networks, with approximately half of all respondents reporting an interest in a secure voice option the next time they purchase a mobile phone.

Among all respondents surveyed, 63 percent said mobile phones are used to discuss business topics considered confidential, while 44 percent reported being aware of employees traveling on business in areas where the cellular networks are considered 'untrusted'.

Smartphone-PDA adoption is significant. According to the survey, 70 percent of all respondents said employees within their organization use smartphones or PDAs. These and other mobile devices are traditionally supported by closed and proprietary mobile networks that have shown to be more vulnerable to malicious compromise.

BlackBerry, Windows Mobile and Palm remain among the most popular smartphone operating systems year-to-year.

***Other interesting facts:***

73 percent of all large organization respondents say their organizations have offices internationally.

67 percent of all large organization respondents said mobile phones are used to discuss business topics considered confidential.

Just over 70 percent of all midsize respondents said employees at their company travel in areas where they must use 'un-trusted' networks.

Based on our research and analysis, we predict the gap between secure voice communication and the rapid pace of mobile/cellular technology innovation and adoption will continue to narrow over the next 12 to 18 months. We can expect to see a marked increase in the availability of smartphones, PDAs and mobile/cellular devices equipped with always-on, integrated security that's both scalable and easy to maintain.