

# Executive Summary

**Thin is in!**  
**The IT Desktop Strategy**  
**in the UK Insurance Industry**



## Foreword

The impact of technology on the financial services industries over the past decade has been immense, none more so than in the insurance sector. So, it should come as no surprise that this research shows the sector is currently experiencing a shift in its IT desktop strategy away from a PC environment towards thin and zero desktops.

The change appears to be driven by the need for IT to be ever faster and more flexible to cope with the changing demands of the sector and the need for ever more rigorous data security. There is no doubt that a thin or zero client on the desktop is the perfect way to meet this brief. More surprising, however, was the lack of loyalty or commitment to any particular software or hardware vendor. It appears IT managers in the insurance sector know thin is in but are not sure just which diet to follow.

Although the financial services sector can be notoriously tough when making purchasing decisions, often gravitating towards the most competitive deal available at the time, there must also be a failure on the part of the IT industry. With the mix of technologies and desktop providers, no vendors appear as yet to have convinced the insurance industry of their vision on how best to deploy a thin desktop environment.

It will be interesting to see if the insurance industry follows one path overtime and if vendors become more effective in delivering their messages of differentiation.

I hope you find this first research helpful and informative when considering your desktop strategy and look forward to sharing our second survey results with you in 12 months time.

If you wish to join our Financial Services sector panel to assist with future research projects, do please get in touch.

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***80% have thin desktops***

***Adoption set to rise from 20–39%***

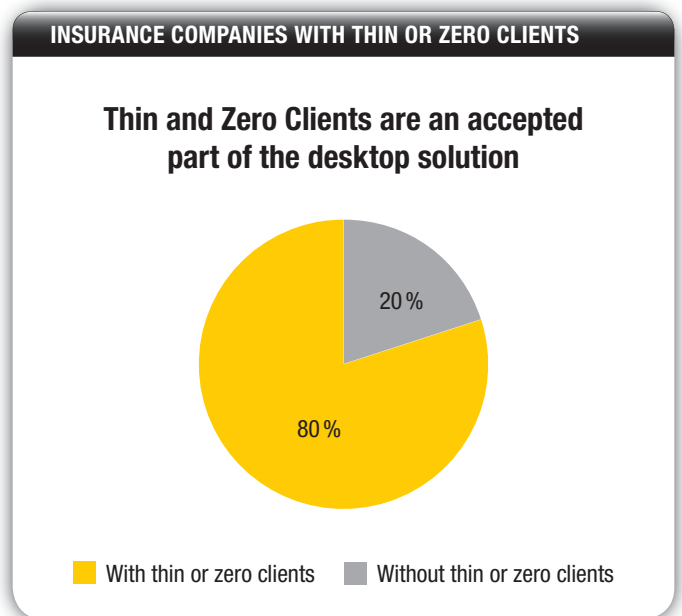
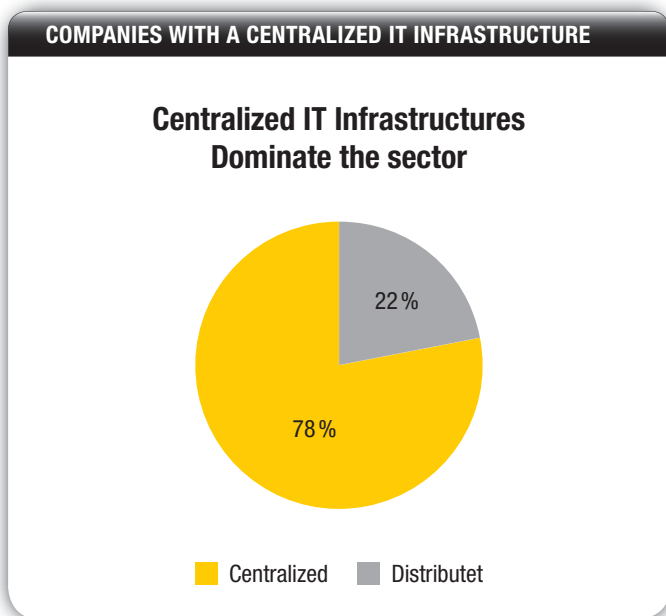
***56% say flexibility biggest benefit***

***58% of insurance companies have more than three brands of thin client on their desktops***

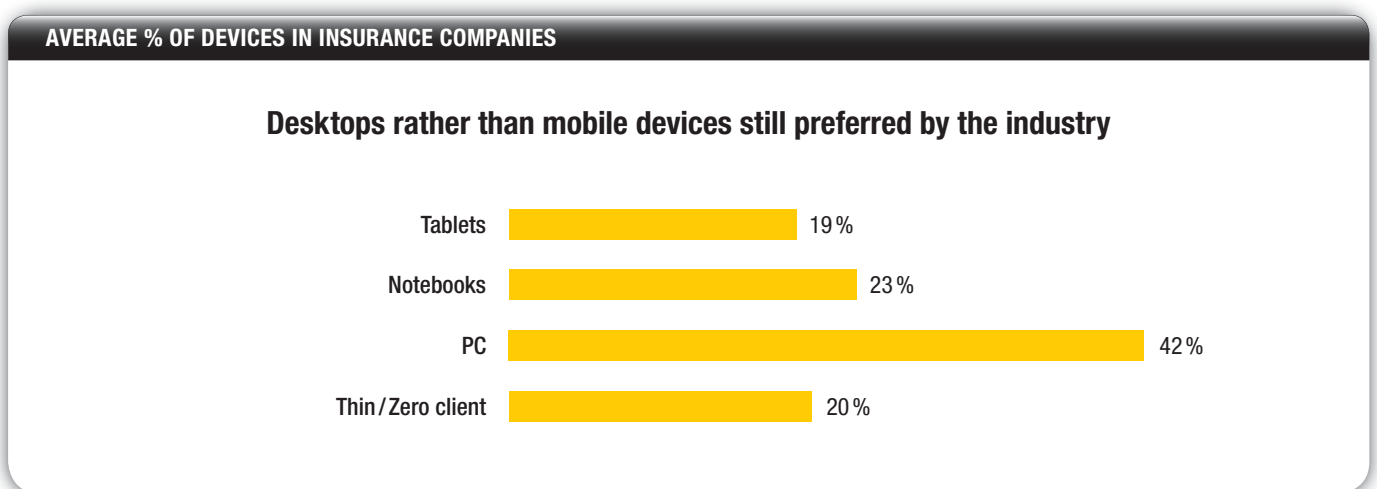
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## The desktop and IT infrastructure of Insurance companies

Currently 78% of the Insurance companies surveyed run a centralized IT infrastructure, with 80% of organizations using some thin or zero client desktops.

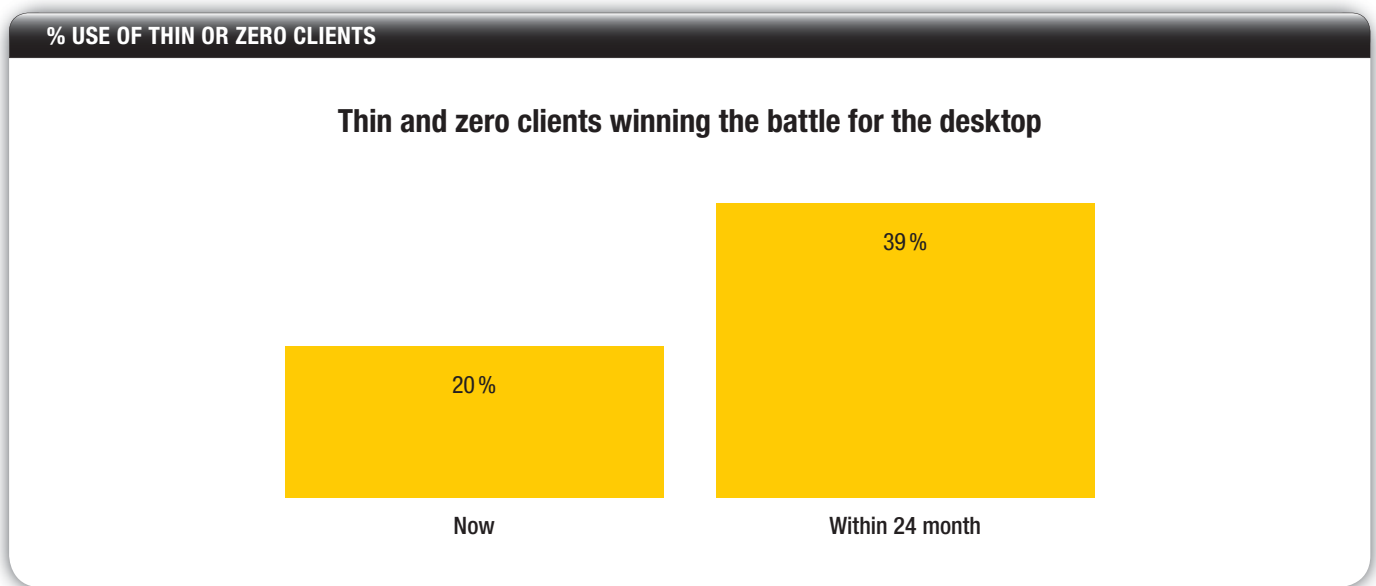


The average number of desktops that are thin or zero clients is 20%, with PC's still dominating at 42%. 23% of users are also using notebooks and 19% tablets.



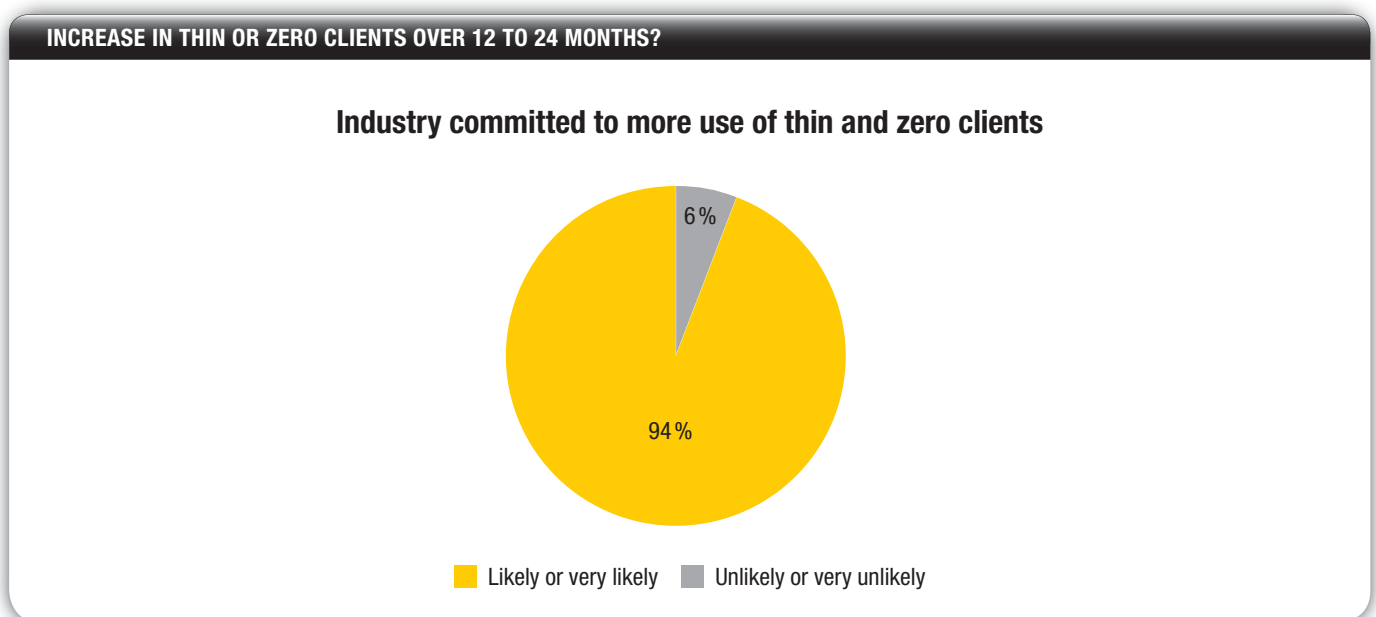
## Insurance desktops to become thinner over next 24 months, say IT managers

UK Insurance industry IT managers plan to put to their desktops on diets over the next 24 months as research shows thin and zero client adoption looks set to rise from 20% to 39%.



Source: Q12: What proportion of desktop users in your business do you anticipate will use thin / zero client technology in 24 months' time? Base: All respondents (50)

With almost all those surveyed (94%) saying an increase in the number of thin and zero clients on their desktops was likely or very likely, a third (32%) also confirmed that this increase could very likely in part come from converting existing hardware into centrally managed thin client-like devices.



## Primary benefits reported

IT managers report the primary benefits of thin or zero clients on the desktop is flexibility (56%), improved security (46%) and speed of deployment (44%).

### PRIMARY BENEFITS OF THIN OR ZERO CLIENTS

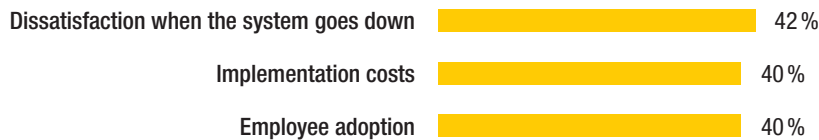
#### The Benefits of Thin and Zero Clients Well Understood



The three top concerns with thin client deployment are: user dissatisfaction when the system goes down (42%), implementation costs (40%) and employee adoption (40%).

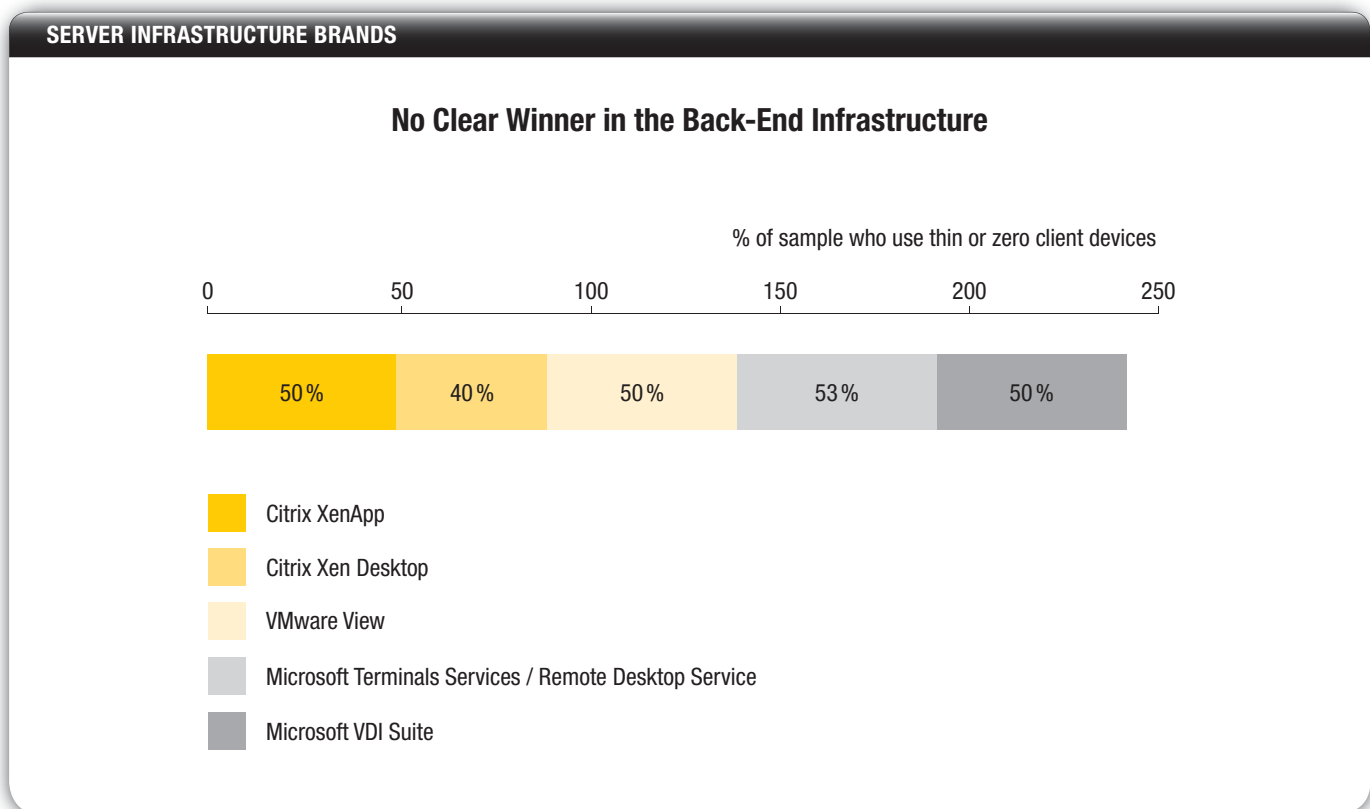
### THREE TOP CONCERNS WITH THIN CLIENT DEPLOYMENT

#### Implementation costs are a surprising concern with 78% already operating Centralized Infrastructures



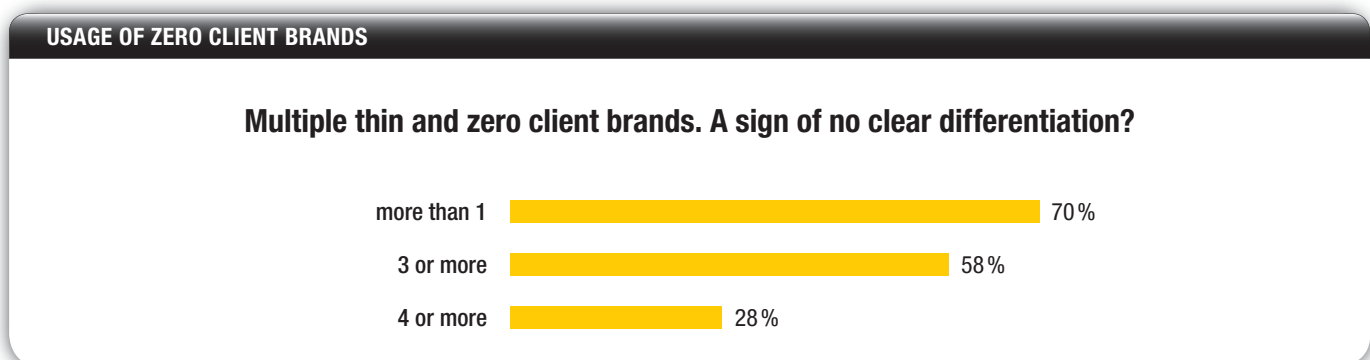
## Little favouritism amongst software or hardware vendors

The research found little favoritism among the server-based computing providers with Citrix, VMware and Microsoft software all present in roughly half of all organizations with thin clients.



Source: Q7: Which of the following server infrastructures does your company use? Base: All respondents (50)

When it came to the desktop, 70% of the Insurance companies surveyed have more than one brand of thin client, 58% have three or more and 28% use four or more.





## Methodology

All respondents confirmed prior to interview that they have either full or partial responsibility for desktop IT in their company. In terms of respondents' seniority, 9% are the owners / founders of their companies, while 26% describe themselves as C-level / VP level and another 23% are directors. 29% are senior managers while 13% are at middle manager level. Anyone less senior than this was excluded from the research.

Company turnovers range from less than £50 million (12%) to over £1 billion (7%) and 83% of companies have multiple sites. Indeed, 73% have sites in different countries and 68% are listed on at least 1 financial market.

Most of the sample are based in the south of England (54%) with 23% based in the North.

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