



The Cisco Connected World Report

Employee Expectations, Demands, and Behavior –
Accessing Networks, Applications, and Information
Anywhere, Anytime, And With Any Device

October 2010

Methodology

Timing and Sample Qualifications

- This report discusses the findings for 1,303 End Users and 1,309 IT Decision Makers (ITDMs) who completed an online survey between August 16 and September 7, 2010
- The survey was translated into local languages and fielded in 13 countries to gain approximately 100 completes for each subgroup in each country (~200 total completes per country)
- Countries included: U.S., Mexico, Brazil, United Kingdom, France, Spain, Germany, Italy, Russia, India, China, Japan, Australia
- Respondents were screened to meet the following criteria:
 - Adults (22+)
 - Employed (full or part time)
 - Does not work for a company in the market research or nonprofit industry
 - Works for an organization that employs 10+ people worldwide
 - End Users: 50% male/50% female; does not work for a company in the IT Consulting industry
 - IT Decision Makers: Carries the title of CIO, CSO, CISO, VP of IT, Director of IT, Network Manager/IT Manager, IT Administration, IT Consultant and has at least some influence in the technology purchasing decisions for their company



Key Findings

- 3 of every 5 (60%) employees believe they don't need to be in the office to be productive, efficient
- 2 of every 3 (66%) employees desire work flexibility
- 2 of every 3 (66%) employees would accept a lower-paying job with more work flexibility than a higher-paying job with inflexibility
- 45% of IT professionals are unprepared or struggling to make their workforces more mobile, distributed
- Employee behavior makes work flexibility more than a technology discussion – IT-employee relationship, policy, education



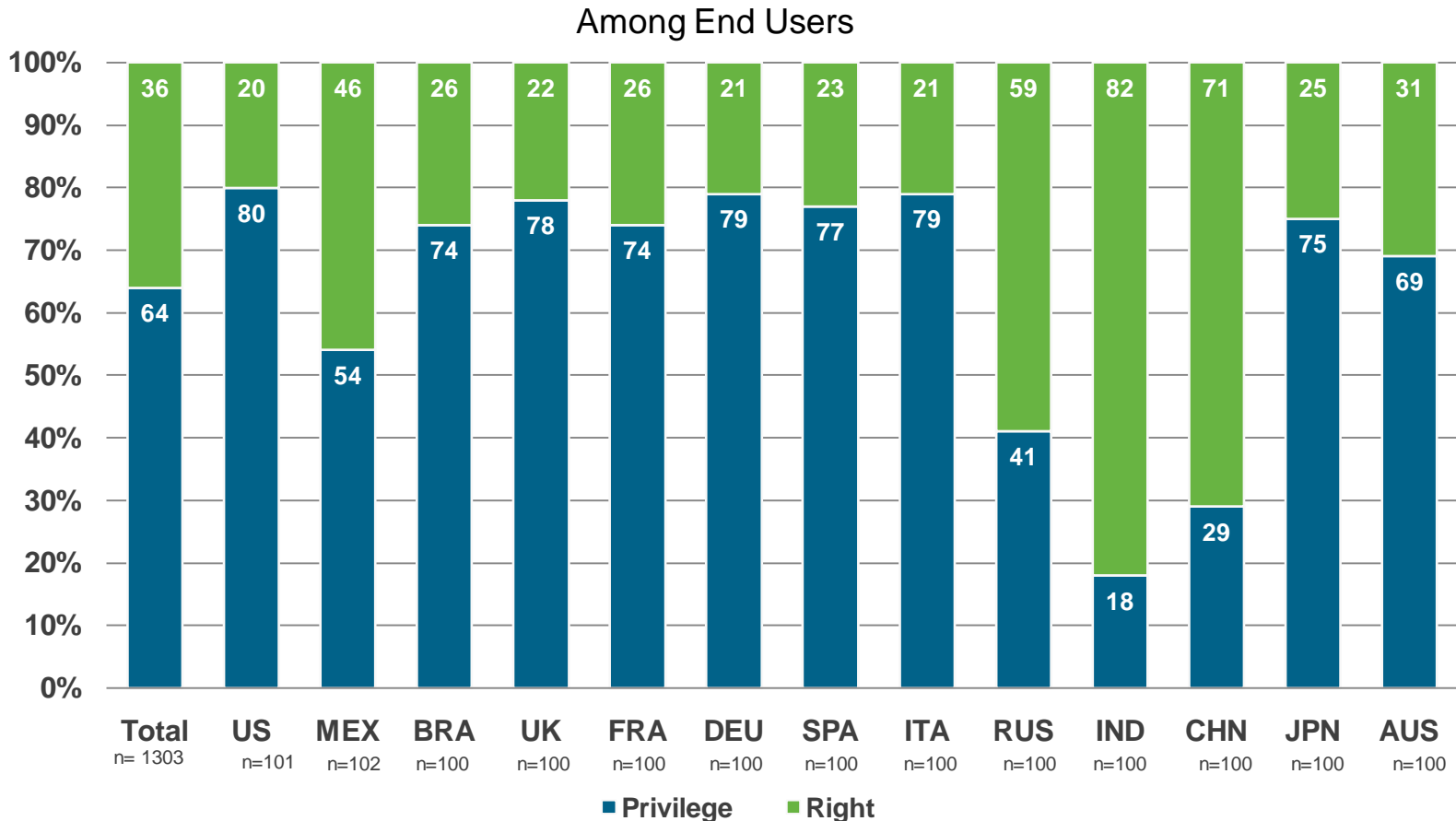
Office Presence and Productivity

Q. Do you feel you need to be physically “in the office” to work efficiently?

Percentage Among End Users	Total (n=1303)	US (n=101)	MEX (n=102)	BRA (n=100)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=100)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Yes, it's necessary for me to make decisions more effectively and efficiently—nothing replaces daily in-person interaction	39	41	41	23	45	44	57	42	53	39	7	19	56	43
Sometimes, it's important for special meetings, but unnecessary for my everyday job routines	24	25	22	34	21	19	16	25	25	20	14	44	21	27
No, I can be more productive with my time by working from home/remotely	8	7	4	10	12	7	6	2	5	10	35	1	5	6
No, it's unnecessary to be confined to an office—technology allows me to be more mobile and flexible	28	28	33	33	22	30	21	31	17	31	44	36	18	24

Remote Access: A Right or a Privilege?

Q. In today's world, being able to work remotely is... (Select one)

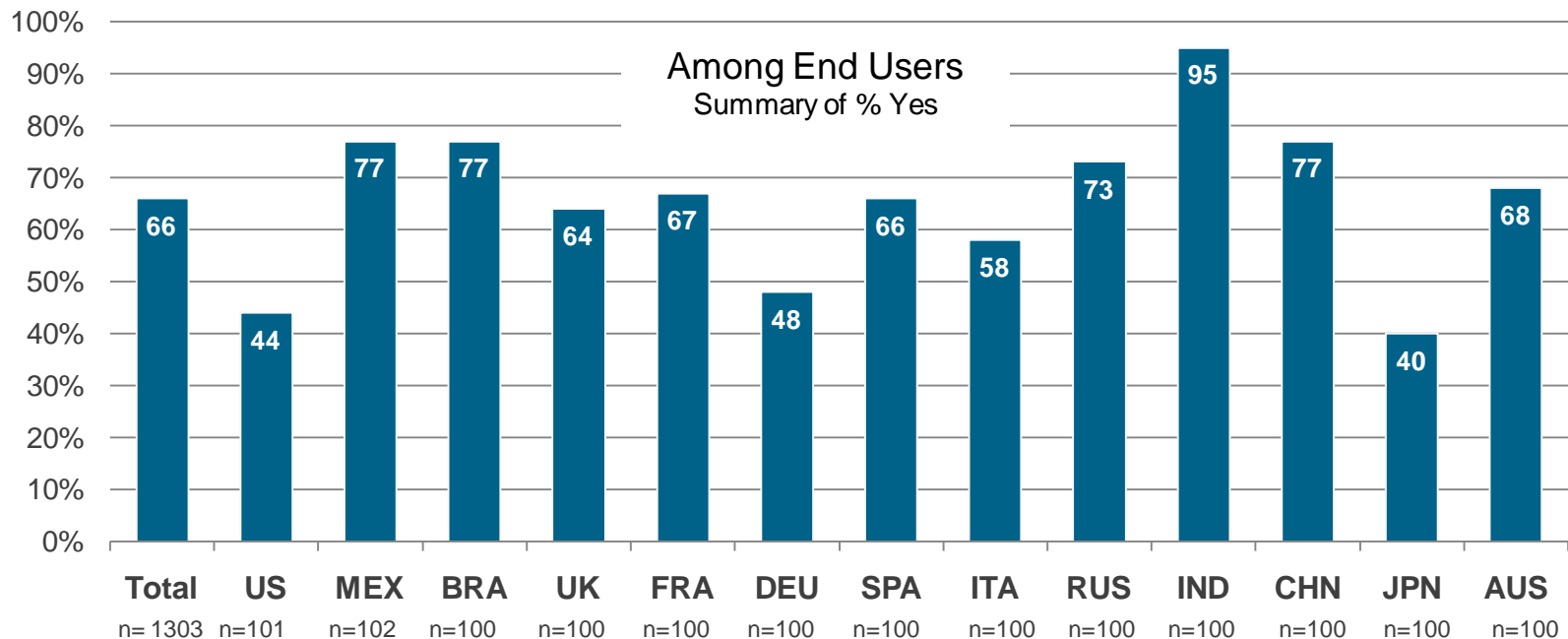


Any Device for Anything

Q. Do you believe in the following perspective on work-issued devices?

About two-thirds of End Users, driven by significantly large proportions in India, Mexico, Brazil and China, agree that company-issued devices should be available for both work and play.

“Because work time often blends with personal time, company-issued devices should be available for both work and play. Any device should be used for accessing any information at any time from any location. It’s the way it is today and the way it will be in the future.”



Value of Remote Access

Q. Imagine you were looking for a new job and received offers from two organizations that are equal in terms of opportunity and reputation...

Given a scenario where End Users have to choose between a job opportunity with a slightly higher salary (+10%) that restricts remote access and an opportunity with a slightly lower salary (-10%) that allows flexible access, most would take the lower offer

Percentage Among End Users	Total (n=1303)	US (n=101)	MEX (n=102)	BRA (n=100)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=100)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
The higher offer. Salary is more important to me than working remotely and having device freedom	34	48	27	17	44	37	52	22	32	30	22	31	50	27
The lower offer. Flexibility is more important to me—I would sacrifice the extra salary for the opportunity to work wherever I am most productive and happiest	66	52	73	83	56	63	48	78	68	70	78	69	50	73

Employee Attitudes Toward Not Having Remote Access

Q. Since your company does not support or allow you to work remotely, which of the following statements would apply? (Select all that apply)

Percentage Among End Users Without Remote Access	Total (n=557)	US (n=40*)	MEX (n=38*)	BRA (n=32*)	UK (n=32*)	FRA (n=63)	DEU (n=67)	SPA (n=37*)	ITA (n=33*)	RUS (n=54)	IND (n=24**)	CHN (n=40*)	JPN (n=62)	AUS (n=35*)
It's not a big issue for me	62	88	66	44	75	62	73	54	67	44	25	53	68	74
I don't work as hard because I don't have the means to do so	15	0	21	19	6	16	3	24	15	30	54	13	6	9
I am inclined to look for other jobs and leave sooner rather than later	13	8	21	19	13	8	9	16	15	15	58	13	3	6
I will never join a company that does not acknowledge the benefits of remote workforces - they're too old-fashioned in their thinking	12	5	8	25	3	10	12	5	6	9	54	18	10	11
My morale is lower	9	5	11	3	9	3	4	8	3	7	25	28	8	9
I don't work as hard because I care less about my job	5	0	5	0	6	5	3	3	3	6	29	5	6	3

Ability to Access Networks, Information Anywhere

Q. Are you currently able to connect seamlessly to your corporate network from a remote location (e.g., work from anywhere at any time)?

- More than half (57%) of employees are currently able to connect seamlessly to their corporate network from a remote location—including significantly large proportions of employees in the US and Spain who indicate they can access information on their corporate network from anywhere at anytime
- Relative to other countries, significantly large proportions of end users in France, Japan, Germany and Russia cannot access information on their corporate network from anywhere at anytime

Percentage Among End Users	Total (n=1303)	US (n=101)	MEX (n=102)	BRA (n=100)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=100)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Yes, I can access information on my corporate network from anywhere at anytime	31	44	33	32	33	28	23	44	35	17	26	28	22	35
NET: No	69	57	66	68	67	72	77	56	65	83	74	72	78	65
I can access information on my corporate network but not from everywhere I need to	26	17	29	36	35	9	10	19	32	29	50	32	16	30
No, I cannot access information on my corporate network from anywhere at any time but I believe I will be able to do so eventually	25	13	31	27	17	25	28	23	17	42	23	35	19	22
No, I cannot access information on my corporate network from anywhere at any time and I don't think I ever will be able to do so	18	27	6	5	15	38	39	14	16	12	1	5	43	13

Inability to Access Networks, Information Anywhere

Q. You indicated above that you are currently not able to connect seamlessly to your corporate network from a remote location (e.g., work from anywhere at any time). Do you expect to be able to in the near future?

- End Users who do not currently work for organizations that allow them to connect remotely are divided on expectations for the future; however, more than three in ten indicate their company is open to the idea and is actively working on policies. Relative to other countries, significantly larger proportions of End Users in:

Brazil, India and China indicate their company is working on policies to incorporate remote access.

The US, UK and Germany can't imagine being able to perform their role remotely.

- More than one in three End Users in the US, France, Germany and Japan would like remote access but believe their company is not open to the idea of its employees working outside of the office

Percentage Among End Users Without Remote Access	Total (n=1303)	US (n=40*)	MEX (n=38*)	BRA (n=32*)	UK (n=32*)	FRA (n=63)	DEU (n=67)	SPA (n=37*)	ITA (n=33*)	RUS (n=54)	IND (n=24**)	CHN (n=40*)	JPN (n=62)	AUS (n=35*)
Net: Yes	49	23	68	75	31	33	27	60	42	65	92	83	30	60
Yes, my company is open to the idea and actively working on policies	32	18	39	59	22	19	18	38	24	46	67	65	6	43
Yes, but I may have to change companies/jobs in order to do so	17	5	29	16	9	14	9	22	18	19	25	18	24	17
Net: No	51	78	31	25	69	67	73	41	57	36	8	18	70	40
No, I can't imagine being able to perform my role remotely	27	40	13	6	53	35	37	30	36	19	8	3	31	20
No, I would like to but my company is not open to the idea of its employees working outside of the office	24	38	18	19	16	32	36	11	21	17	0	15	39	20

Challenges to Seamless Access Anywhere

Q. Who or what do you believe is an obstacle to allowing you to work remotely and connect to its corporate network from outside the office? (Select all that apply)

Percentage Among End Users Without Remote Access	Total (n=557)	US (n=40*)	MEX (n=38*)	BRA (n=32*)	UK (n=32*)	FRA (n=63)	DEU (n=67)	SPA (n=37*)	ITA (n=33*)	RUS (n=54)	IND (n=24**)	CHN (n=40*)	JPN (n=62)	AUS (n=35*)
My job role	35	58	29	19	56	54	36	54	36	17	8	8	31	46
Budget limitations for buying the appropriate technology	29	20	39	28	31	19	15	32	33	31	50	35	34	31
Corporate policies	24	5	18	41	16	25	24	14	39	22	71	28	24	11
Technology	21	5	24	28	13	6	9	8	12	15	88	65	24	14
Executive mandates	17	8	8	31	0	0	31	16	21	20	17	33	21	6
Me, I don't see the value	13	18	8	0	6	16	25	8	15	7	4	8	19	9
IT	12	3	3	34	9	0	10	5	3	9	58	28	10	9
My manager(s)	8	10	8	6	3	8	9	14	21	6	4	3	8	11

Limitations to Seamless Access Anywhere

Q. Which of these represents your greatest frustration regarding limitations to remotely accessing information on your corporate network?

The greatest frustration regarding limitations to remote access is that information among End Users from the total sample is not always accessible depending on where employees are physically located

Percentage Among End Users Without Remote Access	Total (n=1303)	US (n=61)	MEX (n=64)	BRA (n=68)	UK (n=68)	FRA (n=37*)	DEU (n=33*)	SPA (n=63)	ITA (n=67)	RUS (n=46*)	IND (n=76)	CHN (n=60)	JPN (n=38*)	AUS (n=65)
Information is not always accessible depending on where I am physically located	26	18	38	31	18	22	18	27	25	30	32	28	13	28
I need different devices to access different applications	18	13	17	19	12	16	15	17	19	13	22	20	26	18
Our IT department sets too many policies prohibiting access to certain information on various devices	13	7	11	13	25	5	12	13	15	11	12	13	16	14
It's just too difficult to set up my devices to access my corporate network—it's not 'plug and play'	11	5	11	15	12	8	0	3	15	2	28	10	8	9
Accessing my corporate network is not easy when I am physically outside of the office	7	8	8	6	9	3	9	8	3	17	1	3	18	5
Our IT department does not enable us to work from anywhere at any time with any device—we're restricted by device and location and that affects employee productivity and job satisfaction	6	2	3	6	9	14	3	6	6	4	5	15	8	3
I do not experience any limitations to remotely accessing information on my corporate network	19	48	13	10	16	32	42	25	16	22	0	10	11	23

Working “Extra” Hours Outside of the Office

Q. How many ‘extra’ hours of work a day do you estimate you do because you are able to work remotely?

Nearly half (45%) of End Users from the total sample, driven by significantly large proportions in India and China, work an extra 2-3 hours per day because they are able to work outside of the office

Percentage Among End Users With Remote Access	Total (n=1303)	US (n=61)	MEX (n=64)	BRA (n=68)	UK (n=68)	FRA (n=37*)	DEU (n=33*)	SPA (n=63)	ITA (n=67)	RUS (n=46*)	IND (n=76)	CHN (n=60)	JPN (n=38*)	AUS (n=65)
Up to 1 hour	29	49	23	31	34	41	42	27	21	17	12	28	39	32
2-3 hours	45	28	44	41	35	38	27	40	46	54	66	60	50	45
4 hours or more	15	11	17	22	19	16	30	14	18	13	13	7	11	12
I am always online and work throughout my waking hours	10	11	16	6	12	5	0	19	15	15	9	5	0	11

IT's Ability to Support a Mobile and Distributed Workforce

Q. From an IT perspective, how prepared is your company to support a “mobile and distributed” workforce?

- Almost half (45%) indicate their company is unprepared or struggling to support a mobile and distributed workforce
- In China and Brazil, more than half of ITDMs indicate their organization is actively working towards enabling a mobile and distributed workforce as they believe it will provide competitive advantage and benefit productivity

Percentage Among IT Decision Makers	Total (n=1309)	US (n=104)	MEX (n=100)	BRA (n=100)	UK (n=100)	FRA (n=104)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=101)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Net: Unprepared / Struggling	45	47	47	26	37	49	22	42	42	58	85	23	58	46
Completely unprepared. The organization is not looking to support information access from outside of the office	14	13	7	11	11	10	2	5	10	26	48	8	20	9
Completely unprepared. While support for telecommuting has been discussed, it has not been identified as a corporate imperative	15	13	11	6	13	16	10	8	8	18	30	5	26	26
We are struggling to support a small group of mobile workers and we do not expect to expand this capability	16	21	29	9	13	23	10	29	24	14	7	10	12	11
We are actively working towards enabling a mobile, distributed workforce as we believe it will provide competitive advantage and benefit productivity	40	32	43	57	39	37	50	37	33	38	12	65	39	39
We already have state-of-the-art IT support for a “mobile and distributed” workforce	15	21	10	17	24	14	28	21	25	5	3	12	3	15

IT Challenges to Enabling Mobile, Distributed Workforces

**Q. What is the biggest challenge you face in supporting a mobile and distributed workforce?
(Select all that apply)**

Percentage Among IT Decision Makers	Total (n=1309)	US (n=104)	MEX (n=100)	BRA (n=100)	UK (n=100)	FRA (n=104)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=101)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Security	57	45	66	60	52	40	72	59	53	62	49	68	65	53
Corporate culture	38	37	42	35	26	31	33	40	41	50	57	44	24	36
Not enough budget for technology investments	34	33	23	31	41	35	14	13	33	47	32	55	50	30
Not enough staff	17	20	7	20	16	24	11	9	16	11	27	14	33	19
Other	1	6	1	0	2	1	2	4	0	0	1	0	0	2

Data Loss by Employees

Q. Do you feel more data is leaked or lost by employees when they are inside or outside the office? (Select one)

- More than one in three ITDMs feel more data is leaked or lost by employees when they are outside the office
- Relative to other countries, significantly larger proportions of ITDMs in India, Japan and the US feel data is leaked or lost inside the office

Percentage Among IT Decision Makers	Total (n=1309)	US (n=104)	MEX (n=100)	BRA (n=100)	UK (n=100)	FRA (n=104)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=101)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Inside the office	19	28	14	17	14	12	22	12	14	9	50	12	31	19
Outside the office	38	29	54	37	35	35	35	45	30	34	30	49	39	46
It is equal	34	31	29	38	32	43	42	34	52	46	19	32	25	21
Don't know/not sure	8	13	3	8	19	11	1	9	4	12	1	7	5	14

Lost or Stolen Devices

Q. Of the total devices your company has issued to employees in the past 12 months, what percentage (approximately) has been reported lost or stolen? (Select one)

One in four ITDMs indicate that at least 25% or more of the devices their company has issued to employees in the past 12 months have been lost or stolen

Percentage Among IT Decision Makers	Total (n=1309)	US (n=104)	MEX (n=100)	BRA (n=100)	UK (n=100)	FRA (n=104)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=101)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
None	22	15	17	13	13	20	24	18	30	59	5	17	39	10
1% to 24%	47	41	50	60	55	54	59	47	42	29	25	63	38	42
25% to 49%	15	19	17	10	16	10	6	18	18	3	39	13	9	22
50% to 74%	8	11	7	7	5	6	8	5	4	0	27	6	10	15
75% to 99%	2	3	3	5	2	0	0	3	3	0	1	1	0	2
100%	1	3	2	2	3	0	0	1	0	0	0	0	0	2
Don't know/not sure	5	8	4	3	6	11	3	8	3	9	3	0	4	7

Employee Concerns About Security Threats

Q. How concerned are you about security threats when accessing corporate information from outside of your office?

Percentage Among End Users Who Have Remote Access	Total (n=557)	US (n=61)	MEX (n=64)	BRA (n=68)	UK (n=68)	FRA (n=37*)	DEU (n=33*)	SPA (n=63)	ITA (n=67)	RUS (n=46*)	IND (n=76)	CHN (n=60)	JPN (n=38*)	AUS (n=65)
Net: Concerned	70	42	74	83	58	57	67	62	60	72	84	98	74	64
Extremely concerned	21	11	19	29	12	8	15	16	12	20	37	40	8	26
Moderately concerned— I think twice before accessing sensitive information from outside my office	49	31	55	54	46	49	52	46	48	52	47	58	66	38
Net: Not concerned	27	52	24	15	40	35	24	32	35	22	16	2	21	34
Not at all concerned— I never think about security threats	13	11	13	9	16	24	9	19	22	7	16	0	8	12
Not at all concerned— security is the IT department's problem, not mine	14	41	11	6	24	11	15	13	13	15	0	2	13	22
I'm not able to access corporate information from outside my office	4	5	3	1	3	8	9	6	4	7	0	0	5	2

While Working in Public

Q. When working from a remote location in a public setting, I have...(Select all that apply)

Percentage Among End Users Who Have Remote Access	Total (n=1303)	US (n=61)	MEX (n=64)	BRA (n=68)	UK (n=68)	FRA (n=37*)	DEU (n=33*)	SPA (n=63)	ITA (n=67)	RUS (n=46*)	IND (n=76)	CHN (n=60)	JPN (n=38*)	AUS (n=65)
Used a personal email account to send information to coworkers, customers, and prospects	36	11	42	38	26	30	30	44	40	37	49	55	18	26
Noticed a stranger looking at my screen	19	7	14	25	15	27	3	11	10	20	41	42	5	14
Forgotten to monitor my surroundings to make sure no one is looking at my work	19	10	14	10	13	22	6	8	19	24	54	27	13	11
Noticed someone listening to my work-related calls	17	11	11	19	18	24	12	8	16	13	38	25	8	14
Left my belongings and devices unattended (e.g., while getting something to eat or drink, going to the restroom, etc.)	17	8	11	7	12	11	0	13	10	11	46	43	13	15
Accessed an unauthorized wireless connection	15	10	27	10	15	14	3	10	7	9	36	20	5	17
None of the above	30	67	30	19	37	27	55	27	27	35	0	3	47	40

Unsupervised Use of Company Computer

Q. Which of the following people have you allowed to use your company-issued computer without supervision? (Select all that apply)

Percentage Among End Users	Total (n=1303)	US (n=101)	MEX (n=102)	BRA (n=100)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=100)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Coworkers (excluding any installations or repairs conducted by members of your Information Technology staff)	38	18	38	32	37	45	43	40	31	36	56	52	22	39
Family members	20	6	17	14	13	16	7	14	15	35	57	47	2	15
Friends	16	6	16	15	10	13	5	8	8	18	67	24	4	10
Business partners	14	2	10	9	17	4	3	3	9	8	75	16	8	14
People who I don't know	2	1	3	0	1	2	2	3	1	2	7	0	1	1
I have never allowed other people to use my computer without supervision	42	72	41	45	37	36	51	43	49	36	6	25	67	38

Time Spent Doing Personal Activities at Work

Q. What percent of your typical workday is spent doing personal activities (e.g. texting, phone calls, online shopping, checking personal email, video games, etc.)?

In India, nine in ten End Users spend 25% or more of their workdays doing personal activities

Percentage Among End Users	Total (n=1303)	US (n=101)	MEX (n=102)	BRA (n=100)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=100)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
None	19	33	16	17	27	24	22	31	15	7	1	8	30	19
1% to 24%	59	62	70	64	57	59	73	57	62	74	8	68	50	60
25% to 49%	13	1	11	10	8	11	3	5	14	15	45	23	16	10
50% to 74%	7	2	4	4	7	3	2	5	9	3	44	1	3	9
75% to 99%	1	1	0	4	1	2	0	1	0	1	2	0	1	2
100%	0	1	0	1	0	1	0	1	0	0	0	0	0	0

Future Access Expectations

Q. In the future, from where do you expect to be able to access your corporate network or work applications?

Percentage Among End Users	Total (n=1303)	US (n=101)	MEX (n=102)	BRA (n=100)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=100)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Home computer	59	70	48	54	64	63	63	42	49	75	58	73	45	61
Personal mobile devices	45	42	44	42	49	26	31	31	46	54	57	75	44	49
Any phone (<i>work-issued or home device</i>)	34	33	39	28	38	31	19	41	28	38	51	32	28	33
Any publicly available device (<i>e.g., a PC in a library, coffee shop, etc.</i>)	34	26	46	38	34	18	16	45	35	40	59	42	22	23
Car navigation screens	20	14	29	32	21	7	7	18	13	17	41	24	14	19
On airplanes in seatback screen consoles	18	16	24	23	19	3	4	19	15	17	41	21	10	19
TVs	16	15	19	17	24	5	2	17	21	8	20	15	23	16

Summary

- Desire for work flexibility growing strong
- More important than salary
- IT mixed in supporting employee needs
- Employee behavior, experiences raise stakes for IT
- IT's role goes beyond technology—policy, education, relationship
- Customer needs driving Cisco's BN strategy, architecture, offerings





CISCO *together*