



2011 Cisco Connected World Technology Report

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Background and Research Objectives

- In Fall 2010, Cisco Systems partnered with InsightExpress for the execution of a research initiative that effectively gathered insights and feedback across End User and ITDM populations in 12 countries.
- Overall, the research was targeted towards understanding the challenges companies face in an increasingly mobile and security risk-prone world.
- In support of these efforts, the following investigation explores similar issues among a younger demographic—End Users and College Students between 18–29 years old.

Methodology

Timing and Sample Qualifications

- This report discusses the findings for 1,441 College Students (age 18–24) and 1,412 End Users (21–29) who completed an online survey between May 13 and June 8, 2011.
- The survey was translated into local languages and fielded in 14 countries to gain approximately 100 completes for each subgroup in each country (~200 total completes per country).
- End Users were screened to meet the following criteria:
 - College Graduate or Higher
 - Employed Full Time in a Non-IT role
 - Does not work for a company in the Market Research or Non Profit Industry
 - Works for an organization that employs 10+ people worldwide
- Quotas were set to ensure an even distribution of completes by gender.

Subgroup Analysis

- Statistical differences between country subgroups were tested at the 95% confidence level and are indicated with capital letters in the analysis that follows.

Conclusions and Key Findings

Conclusions and Key Findings

Attitudes Toward Remote Access

End User attitudes toward remote access in the workplace tend to be similar to College Students expectations. Both tend to lean toward the perception that it is unnecessary to be in an office everyday, however, End Users recognize that their bosses may feel differently.

- Although most College Students and End Users agree that being able to work remotely is a privilege in today's world, significantly large proportions from China and Russia consider it their right.
- Considerable division exists among those who'd like to work on a traditional schedule vs. those who'd like to work unconventionally in terms of time and location. Just over half (54%) of College Students prefer a traditional schedule, while a similar proportion of End Users (53%) desire one with more flexibility.
- Attitudes toward physical office presence and productivity are similar among End Users and College Students. Nearly half from each audience indicate that 'sometimes it may be important for special meetings, but unnecessary for my everyday job routines. 'Being confined to an office' is least important to Students and End Users in Mexico and China.
- In contrast to these perceptions, most End Users indicate that their boss feels it is necessary for them to be physically present in the office to work efficiently because nothing replaces daily in-person interaction.

Conclusions and Key Findings

Impact of Device and Access Flexibility on Recruitment

Although a relatively large proportion of College Students value device and access flexibility when it comes to plans for entering the workforce, salary is still the most important consideration.

- More than 1 in 4 (29%) College Students from the total sample, driven by those in Mexico and China, believe they would not join a company that did not allow their employees to access social media during work hours with company-issued devices. However, the majority of Students would, driven by more than 3 in 10 who would abide by the company policy.
- More than half of respondents would choose a job with a higher salary given the choice between that and a position with a lower salary that allowed greater flexibility in work schedule and device use. Relative to College Students (40%), a considerably larger proportion of End Users (45%) would choose the job offering more flexibility for less money.
- About one-third of Students anticipate that flexibility, social media access or freedom to use personal devices at work will be more important than salary when accepting a job offer in the future.
- Relative to End Users (33%) own experiences, a considerably larger proportion of College Students (64%) plans to ask prospective employers about their policy around social media and the use of personal devices in the workplace. Among them, 4 in 10 indicate that the policy will not have an impact on their decision to accept or reject the job offer.
- About 4 in 10 (41%) End Users recall that their company used a flexible device policy to attract new employees at the time they were hired and about 3 in 10 feel their social media skills played a factor in their own ability to get hired.

Conclusions and Key Findings

Use of Technology Devices

Both College Students and End Users believe that work-issued devices should be accessible for personal use. These audiences are divided on the optimal way for an organization to distribute devices; however, a significant proportion of Students would prefer to purchase their own at the company's expense. Workplace Smartphone use appears to be in line with Students' expectations, however, a considerable proportion may be surprised to find their future company may not cover the data plan expense.

- Driven by significantly large proportions in Mexico, Brazil, Spain, India and China, roughly 7 in 10 Students and End Users agree with the view that work-issued devices should be available for play because work time often blends with personal time.
- Most End Users tend to use more than 1 device during a typical workday and about one-third use 3 or more devices.
- The largest proportions of Students and End Users use a Laptop computer. Smartphone usage is significantly more prevalent among End Users as compared to College Students. Only a small proportion of Students or End Users use a tablet.
- End Users are largely divided in terms of their preference for acquiring work-related devices, however, the largest proportion (46%) of College Students would like their organization to provide a set budget and allow them to purchase their own devices once they enter the workforce.
- Student expectations of mobile device/tablet use in the workplace are in line with the proportion of End Users who use these devices. However, a considerably larger proportion of Students believe their employer would pay for their mobile data plan compared to the proportion of End Users who say their company actually does.

Conclusions and Key Findings

Remote Access: Expectations and Obstacles

While College Students tend to expect they will be able to access work applications from their home computer or Smartphone once they enter the workforce, End Users confirm that there are challenges.

- The vast majority of End Users feel that remote access is important, driven by more than 4 in 10 who consider it critical. Relative to other countries, seamless remote access is especially critical to End Users in Mexico, Brazil, and Spain.
- For those who are currently in the workforce, just over one quarter indicate that they can access information on their corporate network from anywhere at anytime. This level of unrestricted accessibility is driven by significant proportions of End Users in Mexico, Brazil, Spain, China, India and the US.
- While members of both audience groups tend to expect that they will be able to access work applications remotely from a home computer or personal mobile device in the future, Students' expectations are considerably greater for these devices.
- Corporate policy is cited as the leading challenge to being able to connect remotely, particularly among End Users in Japan.
- The greatest limitations to remote access are not being able to access information from different places and needing different devices to access different applications.

Detailed Findings

Impact of Devices and Access Flexibility on Recruitment

Salary vs. Device Use and Workplace Flexibility

For Future Employment, Mainly Influenced by Students from France, the UK, and Russia, the Most Important Aspect in Accepting a Job Offer for About 2 in 3 (67%) Students from the Total Sample Is Salary.

- About a quarter (24%) of Students from Spain indicate that the 'freedom to use social media at work' is the most important aspect in their future acceptance of a job offer.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Salary	67	66	71	60	56	81	83	71	62	55	80	54	50	75	75
Flexibility in working anywhere at anytime	16	10	22	16	17	9	11	20	8	23	13	27	19	15	14
Freedom to use social media at work	10	11	4	9	12	8	3	9	24	14	3	12	17	4	7
Freedom to use personal devices at work (e.g. iPads, mobile phones, etc.)	7	13	3	14	14	2	3	0	6	8	4	8	15	6	4

Q. Which of the following do you feel will be most important to you in accepting a job offer for future employment? (Select one)

Salary vs. Freedom to Work Remotely

Given the Choice, More than Half of End Users Indicate Being More Likely to Accept a Higher Offer Because Salary Is More Important than Working Remotely and Having Device Freedom.

- In contrast, significantly large proportions of End Users in Brazil, Russia and India would accept the lower offer with flexibility in terms of work place and device usage.

Imagine you were looking for a new job and received offers from 2 organizations that are equal in terms of opportunity and reputation.

One is offering a slightly higher salary (e.g. the difference is less than \$10,000), but restricts working remotely. The other offer is lower in terms of salary (e.g. the difference is less than \$10,000), but is from an organization that allows greater flexibility both in where you live and work as well as, the devices you can use in your job.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
The higher offer: Salary is more important to me than working remotely and having device freedom.	55	62	48	54	41	72	60	60	65	51	43	43	49	64	60
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.	45	38	52	46	59	28	40	40	35	49	57	57	51	36	40

Q. Which offer are you more likely to accept?

Salary vs. Freedom to Work Remotely

The Majority of Students Are More Likely to Accept the Higher Offer as Salary Is More Important to Them than Working Remotely and Having Device Freedom.

- More than half of Students from China and Australia are more likely to accept the lower offer with more flexibility as it would bring more productivity and happiness.

Imagine you were looking for a new job and received offers from 2 organizations that are equal in terms of opportunity and reputation.

One is offering a slightly higher salary (e.g. the difference is less than \$10,000), but restricts working remotely. The other offer is lower in terms of salary (e.g. the difference is less than \$10,000), but is from an organization that allows greater flexibility both in where you live and work as well as, the devices you can use in your job.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
The higher offer: Salary is more important to me than working remotely and having device freedom.	60	63	66	56	56	65	66	53	77	67	57	57	47	60	48
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.	40	37	34	44	44	35	34	47	23	33	43	43	53	40	52

Q. Which offer are you more likely to accept?

Motivations for Choosing a Higher Salary

More than One-Third of End Users, Who Would Rather Have a Position with a Higher Salary Even If It Limited Their Ability to Use Certain Devices and Work Remotely, Indicated It Is Because They Would Ignore or Circumvent the IT Policy Anyway.

- Relative to End Users in other countries, significantly large proportions in Mexico, Spain, China, Brazil and India indicated they would rather have a position with a higher salary because they could just ignore the IT policy.

Among End Users %	Total (n=779)	US (n=62)	CAN (n=48*)	MEX (n=54)	BRA (n=41*)	UK (n=73)	FRA (n=60)	DEU (n=60)	SPA (n=64)	ITA (n=51)	RUS (n=43*)	IND (n=43*)	CHN (n=52)	JPN (n=64)	AUS (n=64)
Yes	35	19	27	72	56	10	20	17	72	35	30	56	58	14	25
No	48	66	50	20	37	60	68	67	23	45	40	35	25	67	48
Don't know/ Not sure	17	15	23	7	7	30	12	17	5	20	30	9	17	19	27

Q. If you answered the higher salary, is that because you would ignore or circumvent IT policy regulating device and application usage anyway?

Motivations for Choosing a Higher Salary

Half of the Students Who Selected the Higher Salaried and More Restricted Position Did Not Select It Because They Were Planning on Ignoring or Circumventing IT Policy Regulating Device and Application Usage.

- More than half of Students from Spain, Brazil, and Mexico selected the higher salaried, more restricted position because they were planning to disregard the company's IT policy.

Among College Students %	Total (n=861)	US (n=63)	CAN (n=67)	MEX (n=59)	BRA (n=59)	UK (n=65)	FRA (n=66)	DEU (n=53)	SPA (n=79)	ITA (n=67)	RUS (n=60)	IND (n=64)	CHN (n=48*)	JPN (n=61)	AUS (n=50)
Yes	35	41	18	51	59	15	20	15	63	24	23	47	44	39	28
No	50	46	63	32	34	71	67	74	28	52	67	31	48	43	54
Don't know/Not sure	15	13	19	17	7	14	14	11	9	24	10	22	8	18	18

Q. If you answered the higher salary, is that because you plan on ignoring or circumventing IT policy regulating device and application usage anyway?

Social Media Access as a Job Criteria

About 4 in 10 College Students Plan to Ask Their Employers About Their Policy Around Social Media and Usage of Personal Devices in the Workplace but Cite that the Policy 'Will Not Have Any Effect on Their Decision Whether or Not to Accept a Job Offer.'

- Nearly half of Students from Brazil, China and Mexico indicate that their employers' policy about social media and usage of personal devices will be a key factor in deciding whether or not to accept a job offer.
- At least 1 in 3 (37%) Students from Germany plan to use their personal devices regardless of their employers' policy.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Yes, this will be a key factor in my deciding whether or not to accept a job offer	24	22	6	47	53	8	10	12	28	30	8	41	49	10	7
Yes but this will not have any effect on my decision whether or not to accept a job offer	40	47	52	44	37	28	35	27	55	31	47	40	42	24	50
No, because I plan on using my personal devices and applications regardless of their policy	16	18	20	8	5	12	16	37	5	22	28	15	9	22	12
No	20	13	22	1	5	52	39	24	12	17	16	4	0	45	32

Q. During future job interviews, will you ask employers about their policy around social media and use of personal devices in the workplace?

Social Media Access as a Job Criteria

One-Third of End Users Has Considered the Unrestricted Use of Mobile Devices and Social Media at Work When Making the Decision to Accept or Reject a Job Offer.

- Relative to other countries, significantly larger proportions of End Users in Mexico, China, Spain and Brazil have considered the unrestricted use of mobile devices and social media at work when making a decision to accept or reject a job offer.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Yes	33	19	12	76	54	13	9	10	57	38	27	47	71	10	13
No	57	72	72	20	37	79	82	81	37	49	55	46	22	72	72
Don't know/ Not sure	11	9	16	4	9	8	9	9	6	13	18	8	8	18	15

Q. Have you considered the unrestricted use of mobile devices and social media at work when making the decision to accept or reject a job offer?

Impact of Restricted Access on Recruitment

Even If a Prospective Company Does Not Allow Its Employees to Access Social Media, About 1 in 3 (32%) College Students Would Still Join that Company and Abide by Its Policy Especially Students in the UK (55%) and Australia (51%).

- Roughly 3 in 10 Students from Mexico and China would not join a company that does not allow its employees access to social media during work hours with company-issued devices because 'it is a fact of life and will be part of our generation's work-life balance and culture.'

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
No — allowing use of social media applications during work hours with company-issued devices is a fact of life and will be a part of our generation's work-life balance and culture	16	15	8	33	19	8	9	20	15	21	5	17	31	11	6
No — other businesses are benefitting from social media applications and that company is behind the times	13	15	12	14	11	7	6	13	14	19	8	24	16	18	5
Yes — I would still find a way to access my social media outlets, so I'm not worried	27	36	19	23	44	14	15	19	43	21	25	31	37	16	27
Yes — I would abide by their policy	32	29	41	22	21	55	41	32	21	25	41	26	13	40	51
Yes — they are not business applications and are a waste of time	12	5	21	8	5	16	29	16	8	14	21	3	3	16	12

Q. When choosing a job, if a prospective company does not allow its employees to access social media (e.g. Facebook, Twitter, etc.) during work hours and with company-issued devices (e.g. desktops, laptops, tablets, Smartphones, etc.), would you still join that company? (Select one)

Incenting New Hires with Flexible Technology Policies

While Most End Users Indicate that Their Organization Had No ‘Flexible,’ ‘Any-Device,’ ‘Any-Application’ Type of Policy to Attract Them as a New Employee, About 4 in 10 (41%) Recall that They Did, Even If It Were Subtle.

- More than 4 in 10 End Users in Spain indicated their company used a flexible, any-device, any-application type of policy to attract new employees when they were first hired.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Yes, it was obvious	16	9	3	34	28	5	2	4	43	12	12	22	31	7	7
Yes, but subtly	25	24	11	44	52	9	13	19	29	30	14	39	38	14	12
No, I had to ask if there was such a policy	14	13	10	10	15	13	9	8	9	20	16	14	16	30	15
Not at all, my organization does not have such a policy	45	54	76	12	5	73	76	69	19	38	58	26	15	49	66

Q. Thinking back to when you were first hired by your current organization, did your employer use a flexible, any-device, any-application type of policy to attract new employees?

Value of Social Media Skills at Work

About 3 in10 (31%) End Users Believe Their Experience and Comfort Level with Social Media Was a Factor in their Employer's Decision to Hire Them.

- Relative to other countries, significantly larger proportions of End Users in Mexico, Brazil and Spain believe their experience and comfort level with social media was a factor in their employer's decision.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Yes	31	14	15	71	63	9	11	4	62	34	17	45	59	18	7
No	53	73	72	23	27	80	77	82	24	51	52	26	22	62	74
Don't Know / Not sure	16	13	13	6	10	11	12	14	13	15	31	30	19	20	20

Q. Do you believe your experience and comfort level with social media was a factor in your employer's decision to hire you?

Attitudes Toward IT Policies in the Workplace

Strongly Encouraged by Students from China and Russia, Approximately Half of Students from the Total Sample Signified that Their Future Company 'Will Need to Be Flexible About Their Need to Stay Connected with Their Work and Personal Life at all Times.'

Among College Students %	Total	US	CAN	MEX	BRA	UK	FRA	DEU	SPA	ITA	RUS	IND	CHN	JPN	AUS
They need to be flexible and open-minded about my need to stay connected with my work and personal life at all times	47	46	42	57	55	31	32	33	54	53	65	59	69	21	35
They need to acknowledge my generation's workforce needs because they are different than my parents generation's needs	42	50	54	36	46	39	36	40	39	43	34	39	54	37	48
I will abide by IT policies whether I agree with them or not	30	29	21	20	28	58	41	52	21	21	23	17	15	34	42
IT policies won't stop me from using the device and accessing the information I want	17	16	20	14	18	8	12	10	14	21	20	27	36	10	9
I don't see the need for IT policies	8	16	7	7	9	6	5	6	8	9	8	6	12	6	5
IT policies are unfair	4	5	3	2	6	2	3	2	4	9	2	5	2	3	5
Don't know / Not sure	8	7	14	3	1	9	13	8	2	8	7	10	1	17	8

Q. When you enter the workforce, your company will probably have an IT policy governing the acceptable use of devices, applications and information. What are your thoughts about these types of IT policies in the workplace? (Select all that apply)

Detailed Findings

Use of Technology Devices

Devices Used in a Typical Workday

Driven by Significantly Large Proportions of End Users in Brazil, Spain and China, the Largest Proportion (44%) from the Total Sample Indicate Using About 2 Devices in a Typical Workday.

- More than 4 in 10 End Users in France and Japan indicate using just 1 device.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
1	23	24	29	9	7	27	42	21	10	26	27	15	23	45	16
2	44	37	35	50	59	34	32	44	60	44	38	46	58	37	42
3	25	32	26	26	23	33	19	21	21	27	25	32	15	14	32
4	5	6	7	6	7	2	6	11	5	3	3	5	4	2	6
5 or more	3	1	3	9	4	5	1	3	3	0	7	3	1	2	4

Q. How many work and personal devices (e.g. desktops, laptops, tablets, Smartphones, etc.) do you use during your typical workday?

Devices Used in Personal Life

Roughly Half of Students from the Total Sample Primarily Use a Laptop in Their Personal Lives, Followed by a Quarter Who Primarily Use a Desktop Computer.

- More than half of Students from Brazil and Italy primarily use a desktop computer in their personal lives.
- About 1 in 3 (37%) Students from Spain primarily uses a Smartphone.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Laptop	55	57	63	65	28	58	69	72	42	27	43	56	70	72	55
Desktop computer	26	20	16	22	62	14	10	15	20	53	38	32	21	14	27
Smartphone	16	22	21	10	9	27	20	11	37	10	15	12	6	10	17
Tablet	2	0	0	3	1	0	0	0	1	9	2	0	4	2	1
None of the above	1	1	0	0	1	1	1	2	0	1	2	1	0	2	0

Q. Which of these devices do you primarily use in your personal life? (Select one)

Attitudes Toward Work-Issued Devices

Mainly Influenced by Students from China (94%), Spain (88%) and Brazil (86%), Most College Students from the Total Sample Agree that 'Company-Issued Devices Should Be Available for Both Work and Play.'

- A significant proportion (41%) of Students from Japan believe that work-issued devices should not be used for personal reasons, compared to Students from other countries.

Because work time often blends with personal time, company-issued devices should be available for both work and play. Any company-issued device can and 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.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Yes	71	67	62	82	86	62	52	65	88	77	66	82	94	44	68
No	15	16	20	5	10	23	22	22	3	13	13	4	3	41	16
Don't know/Not sure	14	17	18	13	4	15	26	13	9	10	21	14	3	16	15

Q. Do you agree with the following perspective on work-issued devices (e.g. desktops, laptops, tablets, Smartphones, etc.)?

Attitudes Toward Work-Issued Devices

About Two-Thirds of End Users from the Total Sample Believe 'Company-Issued Devices Should Be Available for Both Work and Play.'

- Relative to Japan, France, Germany, Canada, the UK, and the US, significantly larger proportions of End Users in Mexico, Spain, China, India and Brazil agree with this point of view.

Because work time often blends with personal time, company-issued devices should be available for both work and play. Any company-issued device can and 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.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Yes	68	64	62	91	81	54	51	53	91	69	72	81	84	31	70
No	20	23	22	5	13	24	34	32	7	19	18	11	11	52	15
Don't know/Not sure	11	13	16	4	6	22	15	15	2	12	10	8	5	17	15

Q. Do you agree with the following perspective on work-issued devices (e.g. desktops, laptops, tablets, Smartphones, etc.)?

Preference for Acquiring Work-Related Devices

Once They Join the Workforce, Roughly Half (46%) of College Students Would Prefer Their Organization Give Them 'a Set Budget to Purchase Their Own Laptop, Smartphone and Other Devices of Their Choice.'

- About 1 in 3 Students from Spain, France and Brazil would like the organization to offer the same equipment to everyone and not allow the use of personal devices.
- Relative to other countries, a significant proportion of Students from Russia would prefer their organization to offer the same equipment to everyone, but also allow workers to use their own devices.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Your organization gives you a set budget to purchase your own laptop, Smartphone and other devices of your choice	46	45	48	64	50	37	34	38	42	45	34	45	75	41	48
Your organization provisions the same equipment to everyone and does not allow you to use personal devices	19	24	10	17	30	21	32	20	35	18	12	20	3	18	9
Your organization provisions the same equipment to everyone, but lets you bring and also use your own devices	35	31	43	19	21	42	34	42	23	37	54	35	22	42	43

Q. When you join the workforce, which of the following would you most prefer for your work-related devices (e.g. desktops, laptops, tablets, Smartphones, etc.)?

Preference for Acquiring Work-Related Devices

End Users Tend to Prefer Their Organization Provides the Same Devices to Everyone, but Are Divided on Whether They Should (or Shouldn't) Be Allowed to Use Their Own Personal Devices at Work.

- In China and Mexico, more than half of End Users would prefer their company allowed them to set a budget to purchase their own devices for work.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Your organization gives you a set budget to purchase your own laptop, Smartphone and other devices of your choice	34	38	26	56	39	21	11	22	42	31	26	38	58	31	32
Your organization provisions the same equipment to everyone and does not allow you to use personal devices	30	30	31	11	18	45	59	49	24	35	20	33	8	40	21
Your organization provisions the same equipment to everyone, but lets you bring and also use your own devices	36	32	43	33	43	35	30	29	34	34	54	30	34	29	47

Q. Thinking about your work-related devices (e.g. laptops, tablets, Smartphones, etc.), which of the following would you most prefer?

Workplace Smartphone Expectations

More than 7 in 10 (72%) Students Expect to Be Able to Use a Work-Issued Tablet or Smartphone Also for Personal Reasons.

- The vast majority of Students from China (97%), Brazil (90%), Mexico (89%) and Spain (86%) expect to use a work-issued tablet or Smartphone for personal reasons as well.
- A significantly larger proportion (59%) of Japanese Students do not expect to use a work-issued tablet or Smartphone for personal needs.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Yes	72	70	63	89	90	60	55	62	86	70	81	80	97	41	59
No	28	30	37	11	10	40	45	38	14	30	19	20	3	59	41

Q. Would you expect to be able to use a work-issued tablet or Smartphone also for personal use?

Workplace Smartphone Expectations

Nearly 3 in 4 (72%) Students Expect Their Employer to Pay for Their Mobile Data Subscription in the Future If They Were to Use Their Personal Smartphone or Tablet for Both Work and Personal Activities.

- This is mainly driven by Students from Spain, China, Italy and Russia, who would expect their employer to pay for their subscription.
- On the contrary, roughly 4 in 10 Students from the US, the UK, Mexico, India and Japan expect to pay for their own mobile data subscription if they were to use their own Smartphone or tablet for both work and personal activities.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
My employer would pay for my mobile data subscription	72	64	72	59	77	61	70	69	86	82	81	64	86	62	69
I would pay for my mobile data subscription	28	36	28	41	23	39	30	31	14	18	19	36	14	38	31

Q. In the future, if you were to use your personal Smartphone or tablet for both work and personal activities, which do you expect?

Most Valuable Personal Items on a Trip

Followed by Their Laptop (25%) and a Smartphone (17%), Half (51%) of College Students Could Least Afford to Lose Their Wallet/Purse (ID, Credit Cards) While They Were on a Trip.

- At least 7 in 10 Students from Japan, Russia and France could least afford to lose their wallet / purse while on a trip.
- About 3 in 10 Students from Spain, the UK, Italy and India could least afford to lose their Smartphone while on a trip.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Wallet/purse (ID, credit cards)	51	44	56	46	40	52	73	58	23	41	74	32	46	83	51
Laptop	25	28	17	41	44	17	18	25	38	23	14	28	34	6	21
Smartphone	17	17	14	9	9	28	8	15	33	27	8	27	18	9	19
Tablet	6	11	13	4	8	3	1	2	6	9	4	12	2	2	9

Q. If you were on a trip which of the following could you least afford to lose? (Select one)

Most Valuable Personal Items on a Trip

While the Largest Proportion of End Users Indicate They Could Least Afford to Lose Their Wallet/Purse (ID, Credit Cards) If They Were on a Business Trip, More than 1 in 4 Could Least Afford to Lose Their Laptop.

- A significantly large proportion of End Users in China, Mexico and Spain indicate they could least afford to lose their laptop on a business trip.
- Roughly one quarter of End Users in India, Italy, the UK, the US and Australia indicate that they could least afford to lose their Smartphone.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Wallet/purse (ID, credit cards)	51	47	62	35	59	51	51	66	46	50	67	30	41	66	49
Laptop	27	23	20	40	25	21	28	22	35	21	23	33	42	20	22
Smartphone	17	23	16	13	10	24	18	8	13	24	7	25	15	14	22
Tablet	5	7	2	12	6	4	3	4	6	5	3	13	3	0	8

Q. If you were on a business trip which of the following could you least afford to lose?
(Select one)

Expected Device Usage for Work

In the Future, Once They Have Entered the Workforce, Half of Students Anticipate Primarily Using a Laptop for Work.

- Relative to Students from other countries, significantly larger proportions of Students from Brazil and Italy anticipate primarily using a desktop computer for work in the future.
- Significantly large proportions of Students from Canada and Spain anticipate primarily using a Smartphone once joining the workforce.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Laptop	50	45	49	52	32	57	51	54	42	31	58	58	68	59	47
Desktop computer	28	33	21	23	58	21	26	26	20	49	25	19	16	29	31
Smartphone	12	11	23	11	6	15	14	8	33	6	5	12	6	9	13
Tablet	6	7	4	13	2	2	2	4	1	14	7	11	11	3	7
None of the above	3	4	4	1	2	5	7	8	4	0	5	0	0	0	3

Q. Thinking toward the future when you join the workforce, what do you expect will be your primary device for your work?

Devices Used in Work Life

More than 7 in 10 End Users Indicate Using a Desktop Computer in Their Work Lives. Just About 3 in 10 Use a Smartphone for Work.

- Relative to other countries, a significantly larger proportion of End Users in India, Spain and Mexico use a Smartphone in their personal lives.

Among End Users Work Life %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Desktop computer	73	65	78	71	80	72	80	77	62	82	88	68	75	45	78
Laptop	49	50	34	72	73	51	28	39	58	35	31	55	53	63	42
Smartphone	31	38	26	41	34	27	19	16	42	35	26	44	30	14	37
Tablet	8	5	4	22	24	2	2	0	13	6	4	6	13	4	8
None of these	1	1	4	1	1	0	2	1	2	1	1	0	0	6	0

Q. Please select any of the following device(s) you use in your personal life and work life.

Devices Used in Personal Life

More than 7 in 10 End Users Indicates Using a Laptop Computer in Their Personal Lives and More than Half Use a Smartphone.

- Relative to other countries, a significantly larger proportion of End Users in Australia, the UK, India and the US use a Smartphone in their personal lives.

Among End Users Personal Life %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Laptop	73	84	83	79	61	89	77	84	64	41	65	69	76	74	77
Smartphone	55	65	60	59	44	68	51	46	40	58	51	68	59	29	74
Desktop computer	49	39	45	59	71	21	47	39	64	68	66	50	45	35	37
Tablet	11	9	11	19	23	3	6	2	11	12	8	8	19	11	12
None of these	1	1	0	0	1	1	4	1	1	2	1	0	1	1	0

Q. Please select any of the following device(s) you use in your personal life and work life.

Company Provided Mobile Data

Just 3 in 10 End Users Use a Personal Smartphone or Tablet for Work and Are Able to Expense the Mobile Data Subscription Plan.

- Relative to other countries, a significantly larger proportion of End Users in Mexico and Brazil indicate they are allowed to expense their mobile data plan on their personal Smartphone or tablet device.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Yes	31	22	16	72	61	13	3	9	56	27	16	47	58	24	13
No	34	45	33	15	25	35	26	37	22	40	44	38	31	38	44
I do not use my personal Smartphone or tablet for work-related activities	35	33	51	13	14	52	71	54	21	33	40	16	11	38	42

Q. If you use your personal Smartphone or tablet for work-related activities, does your employer pay for your mobile data subscription?

Upgrading Technology

Strongly Driven by More than Half of French and Japanese Students, the Largest Proportion of College Students (30%) Want to Upgrade to the Latest Smartphone, Laptop, Tablet or Computing Device 'Only When They Break Down, Because They Like Using Their Devices as Long as Possible.'

- Nearly half (46%) of Spanish Students upgrade to the latest form of technology whenever the newest version comes out, while a similar amount (44%) of Brazilian Students upgrade every 12 months.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Whenever the newest version comes out — I want to have the latest version	24	21	8	38	30	10	3	14	46	37	19	33	39	20	11
Every 12 months	23	31	21	31	44	20	12	27	19	16	22	31	25	7	17
Every two years	23	25	32	9	19	34	31	30	22	23	18	15	10	20	34
Only when they break down, because I like using my devices as long as possible	30	23	40	22	7	36	54	29	13	24	42	21	25	53	38

Q. How often do you want to upgrade to the latest Smartphone, laptop, tablet, or computing device?

Upgrading Technology

Only 1 in 4 End Users Would Like Their IT Department to Upgrade Their Work Devices Whenever the Newest Version Comes Out. Most End Users Prefer to Wait 12 Months or Longer to Upgrade.

- More than half of End Users in Brazil, however, would like to be upgraded whenever newer versions of technology come out.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Whenever the newest version comes out — I want to have the latest version	24	17	14	40	52	12	3	6	41	14	34	36	42	16	7
Every 12 months	30	31	24	41	40	24	21	11	39	32	32	40	28	29	27
Every two years	26	33	33	11	6	31	37	59	10	30	9	11	13	29	49
Only when they break down, because I like using my devices as long as possible	21	19	29	8	2	34	39	24	10	24	25	14	17	26	17

Q. How often would you want your IT department to upgrade you to the latest laptop, tablet, Smartphone or computing device?

Desktop Computer Purchase Intent

Although One Quarter of Students Do Not Foresee Themselves Ever Buying a Desktop Computer in the Future, More than Half (56%) of Them Do.

- No less than 7 in 10 College Students from Brazil, Mexico, Spain, and China can foresee themselves buying a desktop computer in the future.
- Followed by Students from India (42%) and Canada (34%), more than half (55%) of Students from France do not foresee themselves shopping for a desktop computer.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Yes	56	58	44	74	75	54	22	45	71	69	58	42	71	45	52
No	26	24	34	10	19	25	55	30	17	16	29	42	11	22	23
Don't know/ Not sure	19	18	23	16	6	21	23	25	12	15	12	16	19	34	25

Q. Do you foresee yourself ever buying a desktop computer in the future?

Desktop Computer Purchase Intent

Similar to College Students, More than Half of End Users Envision Themselves Buying a Desktop Computer in the Future.

- Relative to other countries, a significantly larger proportion of End Users in Mexico, Spain, Brazil and China foresee buying a desktop computer.
- About 2 in 3 End Users from France do not foresee themselves ever buying a desktop computer in the future.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Yes	52	53	31	82	73	32	16	42	78	55	49	52	72	47	41
No	37	40	54	14	23	53	69	40	15	34	38	38	20	32	42
Don't know/ Not sure	12	7	15	4	4	15	15	18	7	11	13	10	8	21	17

Q. Do you foresee yourself ever buying a desktop computer in the future?

Detailed Findings

Attitudes Toward Remote Access

Remote Access: A Right or a Privilege?

The Majority (60%) of Students from the Total Sample Believe that Being Able to Work Remotely, in Today's World, Is a Privilege.

- More than 3 in 4 Students from Spain and the UK believe working remotely is a privilege whereas more than half of Students from China and Russia believe it is a right

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
A privilege	60	60	73	70	71	79	62	60	85	57	34	55	30	37	71
A right	29	30	18	23	24	16	30	20	10	37	57	33	65	36	14
Don't know/ Not sure	10	10	9	8	5	5	8	20	5	6	9	12	5	28	14

Q. In today's world, do you believe that being able to work remotely (e.g. from home, a coffee shop, etc.) is ... (Select one)

Remote Access: A Right or a Privilege?

About 6 in 10 End Users Believe that Being Able to Work Remotely Is a Privilege in Today's World.

- More than 8 in 10 End Users from Spain believe the ability to work remotely is a privilege.
- Relative to other countries, a significantly larger proportion of End Users in China and Russia believe it is a right to work remotely.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
A privilege	59	69	73	75	71	58	62	67	82	63	34	52	27	30	59
A right	30	23	13	18	23	28	19	21	13	26	59	38	65	42	26
Don't know/ Not sure	12	8	14	7	6	14	19	12	5	11	7	10	8	28	14

Q. In today's world, do you believe that being able to work remotely (e.g. from home, a coffee shop, etc.) is ... (Select one)

Attitudes Toward Office Presence and Productivity

Roughly Half (46%) of Students from the Total Sample Feel that Being in the Office ‘Sometimes May Be Important for Special Meetings, but Will Be Unnecessary for Their Everyday Job Routines.’

- Relative to other countries, a significantly large proportion (58%) of Students from China feel that being in the office will be unnecessary and that they can be more productive with their time by working from home / remotely.
- More than half of Students from the UK and Japan feel that being in the office is ‘necessary for them to make decisions more effectively and efficiently.’

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
It will be unnecessary to be confined to an office - I can be more productive with my time by working from home/remotely, and technology allows me to be more mobile and flexible	24	25	14	41	27	13	16	15	16	36	23	24	58	13	11
Sometimes it may be important for special meetings, but will be unnecessary for my everyday job routines.	46	48	52	43	63	34	43	51	58	46	46	41	33	35	49
It will be necessary for me to make decisions more effectively and efficiently - nothing replaces daily in-person interaction	30	27	34	16	10	53	41	34	26	18	31	35	9	52	40

Q. When you get a job after college, how do you feel about having to be “in the office”? (Select one)

Attitudes Toward Office Presence and Productivity

While 3 in 10 Employees Indicate that It Is Necessary for Them to Physically Be ‘in the Office’ in Order to Make Decisions More Effectively and Efficiently, Nearly Half (47%) Indicate that It Is Unnecessary for Everyday Job Routines.

- Relative to other countries, significantly larger proportions of End Users in France and Germany believe it is necessary to be physically ‘in the office.’

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
No, it's unnecessary to be confined to an office – I can be more productive with my time by working from home/remotely, and technology allows me to be more mobile and flexible	23	17	10	34	23	19	17	13	28	25	26	24	47	17	18
Sometimes, it's important for special meetings, but unnecessary for my everyday job routines	47	58	53	49	54	42	30	36	59	48	48	49	42	37	49
Yes, it's necessary for me to make decisions more effectively and efficiently - nothing replaces daily in-person interaction	31	25	37	17	23	40	53	51	13	27	26	28	10	46	33

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

Perceptions of Management Attitudes Toward Office Presence and Productivity

The Majority of End Users, Driven by Significantly Large Proportions in France, Russia, and Germany Indicate that Their Boss Thinks It's Necessary for Them to Be Physically 'in the Office.'

- Relative to other countries, significantly larger proportions of End Users in Spain, India, Mexico and China indicate that their boss does not think it is necessary for employees to be in the office.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
No, my boss believes it's unnecessary to be confined to an office	11	10	5	21	13	10	9	4	10	14	6	10	23	11	8
My boss believes that sometimes it's important for special meetings, but unnecessary for my everyday job routines	26	27	25	39	34	16	12	20	43	27	17	40	25	19	22
Yes, my boss believes it's necessary for me to make decisions more effectively and efficiently - nothing replaces daily in- person interaction	59	59	66	38	50	66	78	67	43	57	70	50	47	65	66
My boss does not trust me to work from home during the workday	4	4	4	2	3	8	1	9	4	2	7	1	6	5	4

Q. Does your boss feel that you need to be physically "in the office" to work efficiently? (Select one)

Attitudes Toward Working Hours

In the Future, There Is a Relatively Equal Division Among Students Who Would Like Conventional Work Schedules and Those Who Would Like to Make Their Own Unconventional Work Schedules; Although, There Is a Slight Advantage for Preference of a Traditional Work Schedule.

- Conventional work hours are preferred by more than 2 in 3 Students from Spain and the UK.
- The vast majority (81%) of Students from China would prefer to work 'unconventionally based on their own schedule, convenience, and lifestyle.'

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Conventionally based on traditional work schedules	54	57	60	61	63	69	49	38	76	49	43	63	19	63	48
Unconventionally based on my own schedule, convenience, and lifestyle	46	43	40	39	37	31	51	62	24	51	57	37	81	37	52

Q. Again thinking toward the future, when you get a job after college, would you prefer to work conventionally (e.g. 9-5 in an office) or unconventionally (e.g. being online and connected at anytime, from any place you choose throughout the day)?

Attitudes Toward Working Hours

Just over Half of End Users Would Prefer to Work 'Unconventionally' Based on Their Own Schedule, Convenience, and Lifestyle.

- Relative to other countries, significantly larger proportions of End Users in China and Russia would prefer an unconventional workday versus 9-5 in an office.
- In Spain, more than 6 in 10 End Users indicate preference for a traditional work schedule.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Conventionally based on traditional work schedules	47	50	47	47	44	47	59	49	62	37	34	50	29	58	48
Unconventionally based on my own schedule, convenience, and lifestyle	53	50	53	53	56	53	41	51	38	63	66	50	71	42	52

Q. Thinking about your typical work day, would you prefer to work conventionally (e.g. 9-5 in an office) or unconventionally (e.g. being online and connected at anytime, from any place you choose throughout the day)?

Detailed Findings

Remote Access: Expectations and Obstacles

Existence of Seamless Remote Access

More than Half (57%) of End Users Are Currently Able to Connect Seamlessly to Their Corporate Network from a Remote Location—including Significantly Large Proportions of End Users in Mexico, Brazil, Spain and China 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 Japan, France and Germany cannot access information on their corporate network from anywhere at anytime and do not believe they will ever be able to do so.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Yes, I can access information on my corporate network from anywhere at anytime	28	36	25	44	44	26	18	15	41	23	14	37	40	14	12
Yes, I can access information on my corporate network but not from everywhere I need to	29	26	19	44	40	22	10	20	46	34	13	41	34	20	35
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	22	21	23	6	10	26	31	26	9	29	40	17	20	22	31
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	21	17	33	6	6	27	41	39	4	14	33	6	7	44	22

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

Importance of Remote Access

Just over 4 in 10 End Users, Driven by Those in Mexico, Brazil, and Spain, Indicate It Is Critical that They Are Able to Seamlessly Connect to Their Corporate Network from a Remote Location (Whether that's a Coffee Shop or a Hotel Room) at Anytime.

- Relative to other countries, significantly larger proportions of End Users in Germany indicate that it is not at all important that they are able to seamlessly connect to their corporate network from a remote location.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
It is critical — I must be able to connect to my corporate network from anywhere (whether that's a coffee shop, my home, or a hotel room) at anytime	43	36	33	82	87	31	25	17	73	39	24	52	50	21	28
It is not imperative — it is nice to be able to do so but not critical	46	51	47	17	8	49	58	57	26	52	64	42	47	61	59
Not at all important	12	13	20	1	5	21	17	26	1	9	12	6	3	18	12

Q. How important is it that you are able to seamlessly connect to your corporate network from a remote location (e.g. work from anywhere at any time)?

Future Expectations for Remote Access

In the Future, Nearly 2 in 3 Students Expect to Be Able to Access Their Corporate Network Using Their Home Computer While About Half Expect to Do the Same Using Their Personal Mobile Devices.

- About 4 in 10 Students from Spain expect to access their corporate network using their car navigation screens.

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Home computer	63	55	75	54	56	76	49	73	35	67	65	51	72	76	74
Personal mobile devices	51	47	55	48	50	61	41	51	38	47	46	50	76	44	60
Any phone (work-issued or home device)	28	34	26	24	43	36	31	21	27	30	18	34	26	4	39
Any publicly available device (e.g. a PC in a library, coffee shop)	17	14	18	12	18	26	21	19	7	17	23	14	21	9	22
TVs	15	26	7	21	30	20	8	9	16	17	4	17	14	6	11
Car navigation screens	14	14	8	18	24	9	7	3	39	23	11	20	13	4	4
On airplanes in seatback screen consoles and/or by wifi connection	13	15	12	10	16	19	8	16	10	18	10	14	7	8	13
Gas station pumps (those with video screens)	2	3	4	3	4	1	2	1	1	4	2	6	1	0	0
Anywhere on any device	11	18	13	7	5	7	17	12	13	8	16	6	5	14	9

Q. In the future, on which of the following do you expect to be able to access your corporate network or work applications? (Select all that apply)

Future Expectations for Remote Access

The Largest Proportions of End Users from the Total Sample Expect to Be Able to Access Their Corporate Network from Their Home Computer or Personal Mobile Device in the Future.

- Nearly 1 in 5 expect to have access from anywhere on any device, including significantly large proportions of End Users in Brazil, Japan and Spain compared to other countries.

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Home computer	51	54	66	31	31	63	48	54	37	58	57	50	64	34	63
Personal mobile devices	40	46	42	41	32	40	35	25	27	31	48	50	66	28	44
Any phone (work-issued or home device)	26	24	31	30	34	32	31	19	19	24	20	34	22	16	34
Any publicly available device (e.g. a PC in a library, coffee shop, etc.)	20	32	16	27	16	19	9	8	18	22	28	18	34	9	22
On airplanes in seatback screen consoles and/or by wifi connection	16	17	16	26	14	14	10	12	22	14	14	25	20	6	16
Car navigation screens	12	8	9	24	10	6	5	3	16	19	7	25	23	6	8
TVs	11	13	13	15	17	12	8	5	16	13	6	14	9	6	10
Gas station pumps (those with video screens)	5	3	3	18	5	2	1	2	8	5	3	9	10	4	1
Anywhere on any device	18	14	14	23	35	17	20	10	26	16	12	15	10	27	17

Q. In the future, on which of the following do you expect to be able to access your corporate network or work applications?

Obstacles to Connecting Remotely

Roughly Half of End Users, Who Are Unable to Connect to Their Corporate Network from Remote Locations, Indicate that It Is Due to Corporate Policies.

- Relative to other countries, a significantly large proportion of End Users in China indicate that they are unable to connect because technology is an obstacle.

Among End Users %	Total (n=614)	US (n=38*)	CAN (n=56)	MEX (n=12**)	BRA (n=16**)	UK (n=53)	FRA (n=72)	DEU (n=65)	SPA (n=13**)	ITA (n=43*)	RUS (n=73)	IND (n=23**)	CHN (n=28*)	JPN (n=66)	AUS (n=56)
Corporate policies	48	26	38	25	56	34	49	51	62	56	48	61	64	65	39
My job role	29	37	48	17	25	28	26	34	0	21	32	22	18	23	38
Budget limitations for buying the appropriate technology	23	34	34	17	6	23	21	11	8	19	26	26	29	20	27
Technology	14	11	11	33	19	19	13	11	15	9	10	26	36	6	23
IT	13	21	14	17	6	17	19	20	15	0	7	9	14	3	16
My manager(s)	13	8	18	17	25	8	8	14	23	23	15	0	14	12	7
Me - I don't know how	8	5	5	8	6	9	1	8	0	9	8	13	4	14	11

Q. You indicated above that you are unable to connect to your corporate network from a remote location. Who or what do you believe is an obstacle? (Select all that apply)

Impact of Not Having Remote Access

Although Most (71%) End Users Indicate that Not Having Remote Access Is Not a Big Issue, About 1 in 10 Are Inclined to Look for Other Jobs or Don't Work as Hard Because They Don't Have the Means to Do So.

- More than 1 in 5 End Users in India indicate they will never join another company that does not acknowledge the benefits of remote workforces.

Among End Users %	Total (n=614)	US (n=38*)	CAN (n=56)	MEX (n=12**)	BRA (n=16**)	UK (n=53)	FRA (n=72)	DEU (n=65)	SPA (n=13**)	ITA (n=43*)	RUS (n=73)	IND (n=23**)	CHN (n=28*)	JPN (n=66)	AUS (n=56)
I am inclined to look for other jobs and leave sooner rather than later	11	11	11	25	13	13	6	9	8	14	15	17	11	2	14
I don't work as hard because I don't have the means to do so	9	5	11	17	13	4	11	8	0	2	18	17	0	6	11
I will never join another company that does not acknowledge the benefits of remote workforces - they're too old-fashioned in their thinking	8	3	5	8	19	2	4	5	8	14	7	22	7	14	7
My morale is lower	7	3	9	0	6	15	6	3	0	7	7	4	4	5	14
I don't work as hard because I care less about my job	5	11	5	8	6	8	7	0	0	0	4	4	4	2	11
It's not a big issue for me	71	74	73	42	56	81	75	83	85	70	58	48	75	76	71

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

Remote Access Limitations

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.

- In France and Russia, significantly large proportions of End Users indicate there are no limitations.

Among End Users %	Total (n=798)	US (n=62)	CAN (n=44*)	MEX (n=88)	BRA (n=84)	UK (n=48*)	FRA (n=28*)	DEU (n=35*)	SPA (n=85)	ITA (n=57)	RUS (n=57)	IND (n=27*)	CHN (n=78)	JPN (n=34*)	AUS (n=50)
Information is not always accessible depending on where I am physically located	22	23	20	24	20	13	18	29	21	19	19	23	29	21	28
I need different devices to access different applications	18	16	16	17	19	15	0	14	28	16	11	23	23	26	8
Our IT department sets too many policies prohibiting access to certain information on various devices	16	15	16	16	26	21	7	17	11	11	11	28	10	9	10
It's just too difficult to set up my devices to access my corporate network - it's not 'plug and play'.	14	18	14	13	11	15	11	6	16	19	7	10	10	18	22
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	10	10	7	17	13	4	14	9	6	9	11	4	13	6	12
I do not experience any limitations to remotely accessing information on my corporate network	20	19	27	14	11	33	50	26	18	26	41	12	14	21	20

Q. Which of these represents your greatest frustration regarding remotely accessing information on your corporate network? (Select one)

Respondent Profile

Age

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
21–24	24	16	13	45	30	23	22	9	39	22	25	35	12	25	16
25–29	76	84	87	55	70	77	78	91	61	78	75	65	88	75	84

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
18–20	31	5	39	43	26	47	38	17	49	7	54	17	18	39	38
21–24	69	95	61	57	74	53	62	83	51	93	46	83	82	61	62

Q. Which of the following best describes your age?

Gender

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Male	47	45	32	63	68	32	30	44	45	48	31	71	48	60	35
Female	53	55	68	37	32	68	70	56	55	52	69	29	52	40	65

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Male	56	49	34	78	67	46	29	46	80	70	55	83	69	50	32
Female	44	51	66	22	33	54	71	54	20	30	45	17	31	50	68

Q. What is your gender?

Education

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
College graduate (for example, B.A., A.B. or B.S.)	70	71	88	63	55	72	32	55	56	80	91	57	86	82	92
Completed some graduate school, but no degree	5	3	6	7	12	9	3	0	5	1	7	10	3	3	3
Completed graduate school (for example, M.S., M.D., Ph.D.)	25	26	6	30	33	19	65	45	39	19	2	33	11	15	6

Q. What is the highest level of education you have completed or the highest degree you have received so far?

Plans for Graduate School

Among College Students %	Total (n=1441)	US (n=100)	CAN (n=101)	MEX (n=106)	BRA (n=105)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=103)	ITA (n=100)	RUS (n=106)	IND (n=113)	CHN (n=102)	JPN (n=101)	AUS (n=104)
Yes, immediately after undergraduate	54	56	47	70	70	37	58	56	70	79	43	61	43	27	33
Yes, but a few years after undergraduate	16	24	25	20	25	20	4	9	17	6	11	15	25	3	18
No, I plan to start working immediately	19	13	15	3	2	24	20	15	3	10	35	18	26	58	22
Don't know/Not sure	12	7	14	8	3	19	18	20	11	5	10	6	6	12	27

Q. Are you planning to attend graduate school after receiving your undergraduate degree?
(Select one)

Job Title

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Chairman, CEO, Owner, Partner or President	5	1	0	23	5	0	0	1	28	8	2	1	1	1	1
Controller, Treasurer or CFO	1	1	4	2	2	1	0	0	5	2	2	1	0	0	1
Vice President, General Manager or Managing Director	2	7	0	8	9	1	0	0	1	2	2	0	1	0	1
Middle management (group director, department, supervisor or section manager)	27	27	26	29	45	27	19	21	31	16	23	43	46	10	19
Other management	9	12	3	4	5	6	29	6	4	13	8	9	10	7	4
Drafting, engineering or R&D	9	3	8	7	17	4	10	10	10	15	4	6	4	25	4
Professional staff (e.g. HR, marketing, purchasing, accountant, architect, doctor, lawyer or teacher)	46	49	59	27	17	61	42	62	21	44	59	41	38	57	71

Q. What is your job title or level of responsibility? (Select one)

Job Function

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Finance	18	16	12	33	25	20	10	13	34	12	24	20	5	8	18
Marketing/Sales	10	10	12	8	6	9	9	14	3	7	10	24	12	9	10
Customer Service	9	11	14	5	4	15	8	11	5	9	13	6	7	3	11
Operations	8	7	12	7	7	10	3	5	5	5	5	16	14	20	2
Research and Development	7	5	6	4	7	2	10	14	3	11	3	6	10	15	8
Human Resources	6	3	6	6	2	1	5	6	9	9	3	5	14	8	6
Manufacturing	6	5	1	13	2	0	7	4	11	1	8	6	8	5	0
Purchasing/Procurement	4	2	2	1	14	0	1	3	5	1	10	2	8	5	3
Senior Management	4	5	0	3	8	1	3	3	3	6	6	5	8	1	4
Training	4	5	3	4	3	8	5	3	4	2	6	3	6	1	7
Software Engineering	3	2	0	12	4	0	2	4	8	5	0	4	1	0	0
Hardware Engineering	3	2	1	0	17	1	5	1	3	3	1	1	3	1	1
Other	18	27	31	4	1	34	22	19	6	20	11	3	5	24	31

Q. Which one of the following best describes your job function? (Select one)

Industry

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Finance, Banking, Accounting	12	11	9	23	11	12	7	8	23	16	12	17	5	2	13
Manufacturing	12	5	3	12	5	5	13	11	13	14	16	15	29	29	1
Health/Medical/ Pharmaceutical	10	6	19	1	2	13	17	8	5	11	9	13	7	14	10
Education	9	19	9	14	1	26	8	7	3	3	6	2	10	9	10
Government (Public Admin)	7	7	11	3	9	7	8	23	5	1	4	0	8	2	13
Construction	6	2	3	5	10	1	8	3	10	4	11	4	6	6	7
Business Consulting	4	1	4	1	9	2	3	1	4	10	2	8	0	0	5
Insurance/Real Estate/Legal	4	6	5	2	9	5	2	3	2	4	3	5	4	3	5
Retailer (Non-Computer)	4	8	5	0	1	8	1	3	0	0	9	5	3	7	8
Hospitality	3	1	5	7	7	0	3	1	7	1	2	4	4	1	2
Internet, Computer, or Communications Software	3	1	0	10	6	0	0	2	3	4	2	3	5	1	2
Transportation	3	1	2	4	9	2	1	1	4	3	4	1	1	5	1
Shipping/Handling/Importing & Exporting/Trucking	2	1	0	1	1	0	0	4	3	0	1	4	7	0	4
Utilities	2	3	1	2	1	2	5	1	0	2	2	1	3	2	0
Entertainment	1	3	1	2	2	1	0	1	3	3	1	1	0	0	2
Government (Military)	1	2	0	0	0	1	0	2	0	1	1	1	0	0	1
Internet, Computer, or Communications Hardware	1	0	1	1	5	0	2	1	2	0	0	2	1	0	0
Software Development	1	1	0	3	4	0	0	3	2	1	0	5	1	0	0
Travel	1	1	1	1	2	2	0	1	1	1	1	3	1	0	3
Other General Industry	3	4	2	1	3	4	2	0	4	5	0	1	5	9	1
Other Service Businesses	3	4	4	6	0	2	6	10	0	5	2	2	1	3	2
Other, please specify	8	13	15	1	3	8	14	6	4	11	12	4	2	7	10

Q. Which industry are you in? (Select one)

Company Size

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
10–19	5	8	11	1	5	5	9	4	1	7	2	0	1	4	6
20–49	9	13	6	7	9	7	14	10	12	11	10	3	3	7	10
50–99	11	10	11	15	14	10	7	12	17	16	11	6	13	8	10
100–249	14	8	10	25	23	14	6	10	19	17	13	10	20	12	15
250–499	12	6	6	24	10	7	10	1	30	8	16	6	19	13	7
500–749	6	5	10	2	17	3	1	7	3	8	5	9	8	4	8
750–999	5	5	2	9	4	5	4	2	6	8	6	8	7	1	2
1000–9999	20	20	25	8	11	21	21	22	5	10	23	31	22	33	25
10,000 or more	18	25	19	9	7	29	28	32	6	15	14	28	8	18	18

Q. Approximately how many people does your company employ at all locations, worldwide?

Company Revenue

Among End Users %	Total (n=1412)	US (n=100)	CAN (n=100)	MEX (n=100)	BRA (n=100)	UK (n=101)	FRA (n=100)	DEU (n=100)	SPA (n=98)	ITA (n=100)	RUS (n=100)	IND (n=101)	CHN (n=106)	JPN (n=100)	AUS (n=106)
Less than \$25 million	17	23	20	8	13	19	19	18	11	16	28	18	10	17	18
\$25 million to just under \$100 million	14	13	10	15	14	10	11	15	15	10	10	30	26	7	11
\$100 million to just under \$500 million	14	6	6	18	36	6	7	9	15	15	14	16	22	16	9
\$500 million to just under \$1 billion	10	5	6	24	19	4	3	2	21	12	4	14	13	6	4
\$1 billion to just under \$5 billion	9	9	6	20	6	6	2	6	22	6	4	5	13	11	4
\$5 billion or more	9	6	5	8	7	16	13	12	8	15	5	8	7	13	10
Don't know	27	38	47	7	5	40	45	38	6	26	35	10	8	30	43

Q. Which of these categories captures your company's revenue for 2010? (Select one)

Thank you.

