



The Future of Work: Information Access Expectations, Demands, and Behavior of the World's Next-Generation Workforce

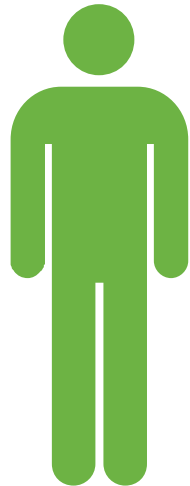
November 2, 2011

Methodology

Timing and Sample Qualifications

THE SECOND ANNUAL CISCO CONNECTED WORLD TECHNOLOGY REPORT

1400



COLLEGE
STUDENTS

(18–23 YEARS OLD)



1400

YOUNG
PROFESSIONALS

(UNDER 30 YEARS OLD)

- The survey was translated into local languages and fielded in 14 countries to gain approximately 100 completes for each subgroup in each country
- Countries: United States, Canada, Mexico, Brazil, United Kingdom, France, Spain, Germany, Italy, Russia, India, China, Japan, Australia

Chapter 1 Summary of Key Findings

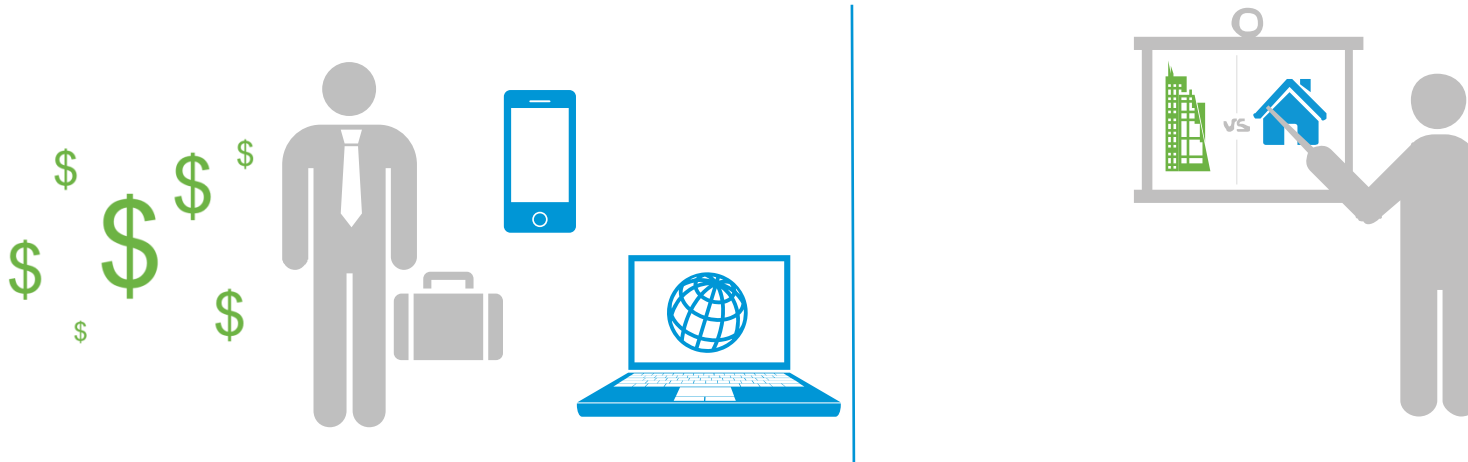
September 21, 2011

- The Internet is integral in the lives of the world's next generation of workers
- Online communications are challenging face-to-face contact as the primary method of interpersonal communications
- Attitudes toward information access, mobile devices, and social media will influence the future of work—from business communications and work lifestyles to corporate cultures and talent acquisition
- As a result, increasing demands for information access will put new demands on businesses and their networks



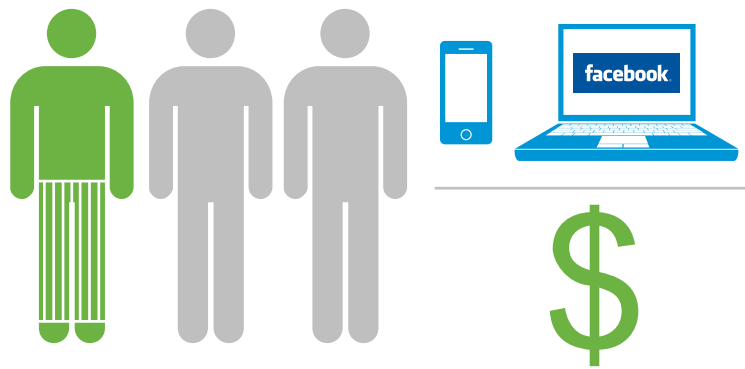
Chapter 2 Summary of Key Findings

November 2, 2011



- The expectations and priorities of the next generation of the world's workforce are not exclusively tied to money
- The importance of devices and the information they carry rivals the importance of money
- Companies acknowledge the value Millennials provide in utilizing technology to help companies' efficiency and competitive advantage
- The growing use of mobile devices for work use is creating strains on corporate networks
- The expectation of the next-generation workforce is increasingly emphasizing work flexibility, mobility, and non-traditional workstyles – and may align with how innovative companies can be

The Job Search: What the Next Workers Want



1 in 3

WOULD PRIORITIZE SOCIAL MEDIA FREEDOM, DEVICE FLEXIBILITY, AND WORK MOBILITY OVER SALARY IN ACCEPTING JOB OFFERS

2 of 5 (40%) COLLEGE STUDENTS

AND

2 of 5 (45%) YOUNG EMPLOYEES

WOULD ACCEPT A LOWER-PAYING JOB WITH MORE FLEXIBILITY WITH DEVICE CHOICE, SOCIAL MEDIA, AND MOBILITY THAN A HIGHER-PAYING JOB WITH LESS FLEXIBILITY

The Job Search: What the Next Workers Want

Influence of Social Media and Mobile Device Policies on Job Choice

More than half (56%)
OF COLLEGE STUDENTS

IF ENCOUNTERED A COMPANY THAT BANNED ACCESS TO SOCIAL MEDIA, THEY WOULD EITHER NOT ACCEPT A JOB FROM THEM OR WOULD JOIN AND FIND A WAY TO CIRCUMVENT CORPORATE POLICY

ABOUT
2 of 3
(64%)
COLLEGE STUDENTS

PLAN TO ASK ABOUT SOCIAL MEDIA USAGE POLICIES DURING JOB INTERVIEWS

1 in 4
(24%)
COLLEGE STUDENTS

IT WOULD BE A KEY FACTOR IN THEIR DECISION TO ACCEPT AN OFFER



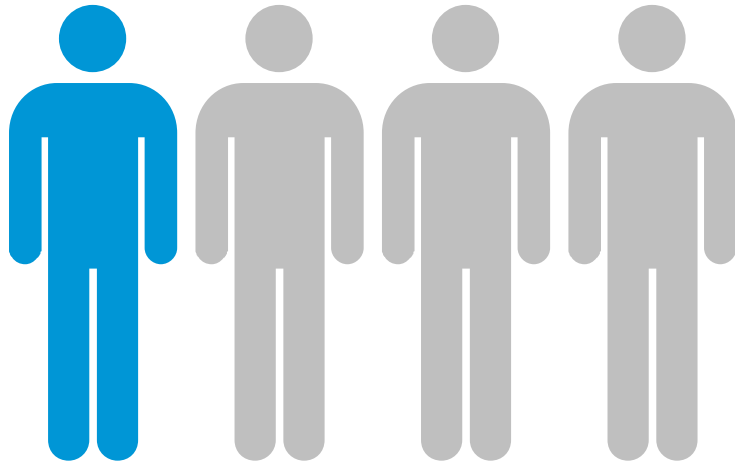
The Job Search: What the Next Workers Want

Remote Access, Flexible Work Hours, And Job Choice

EMPLOYEES ARE EXPECTING GREATER WORK FLEXIBILITY

AT
LEAST **1 in 4**
EMPLOYEES

SAID THE ABSENCE OF REMOTE
ACCESS WOULD INFLUENCE
THEIR JOB DECISIONS



- ✓ Leaving the company sooner than later
- ✓ Slacking off
- ✓ Lowering morale
- ✓ Declining job offers outright

When the Next Workers Arrive

Influence of Social Media and Mobile Device Policies on Job Choice

2 of 5 (41%)

EMPLOYEES

SAID THEIR COMPANIES MARKETED A FLEXIBLE DEVICE AND SOCIAL MEDIA POLICY TO RECRUIT AND ATTRACT THEM

31%

OF EMPLOYEES

BELIEVE THEIR COMFORT LEVEL WITH SOCIAL MEDIA AND DEVICES WAS A FACTOR IN THEIR HIRING



When the Next Workers Arrive: Connectivity Everywhere

Importance of Mobile Devices

THE DAYS OF ONE DEVICE ARE OVER


MORE THAN **3 of 4** (77%)
EMPLOYEES

HAVE MULTIPLE DEVICES, SUCH AS A LAPTOP AND A SMARTPHONE OR MULTIPLE PHONES AND COMPUTERS

1 in 3 (33%)
EMPLOYEES

USE AT LEAST THREE DEVICES FOR WORK

7 out of 10
COLLEGE STUDENTS



BELIEVE THAT COMPANY-ISSUED DEVICES SHOULD BE ALLOWED FOR PERSONAL AND BUSINESS USE BECAUSE OF THE BLENDING OF WORK AND PERSONAL COMMUNICATIONS IN THEIR DAILY LIFESTYLES

When the Next Workers Arrive: Connectivity Everywhere

Importance of Mobile Devices: The Mobile Device Wish List



81%

(4 of 5)

OF COLLEGE STUDENTS

WANT TO CHOOSE THE DEVICE FOR THEIR JOBS—EITHER BUDGET TO BUY THEIR OWN OR USE THEIR OWN PERSONAL DEVICE

68%

(more than 2 of 3)

OF EMPLOYEES

BELIEVE THEIR COMPANIES SHOULD ALLOW THEM TO ACCESS SOCIAL MEDIA AND PERSONAL SITES WITH THEIR WORK-ISSUED DEVICES

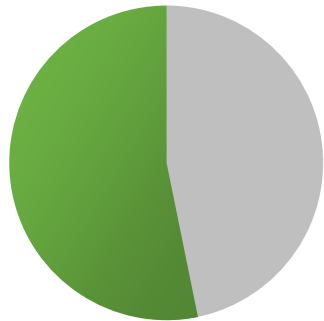
42%

(2 of 5)

OF COLLEGE STUDENTS

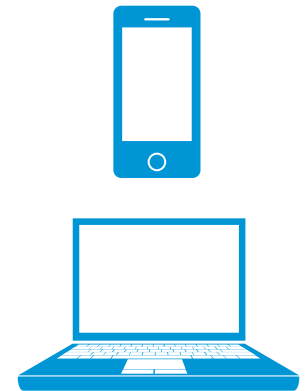
BELIEVE COMPANIES SHOULD BE FLEXIBLE AND EMPATHETIC TO THEIR NEED TO STAY CONNECTED VIA SOCIAL MEDIA AND PERSONAL WEB SITES

Importance of Mobile Devices: Your Money or Your Smartphone?



MORE THAN
HALF

WOULD RATHER LOSE THEIR
WALLET OR PURSE BEFORE
LOSING THEIR SMARTPHONE
OR MOBILE DEVICE



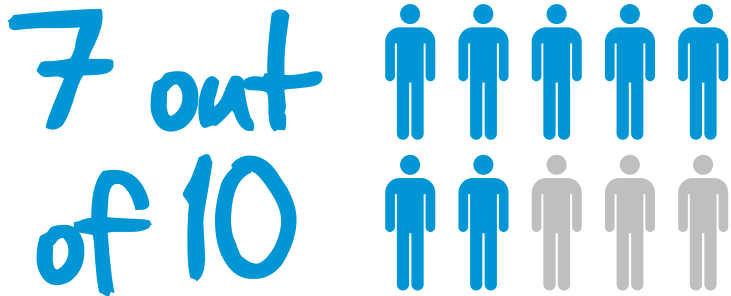
Connectivity Anywhere on Anything: Attitudes Toward Workplace Flexibility and Remote Network Access



3 of 10 (29%)

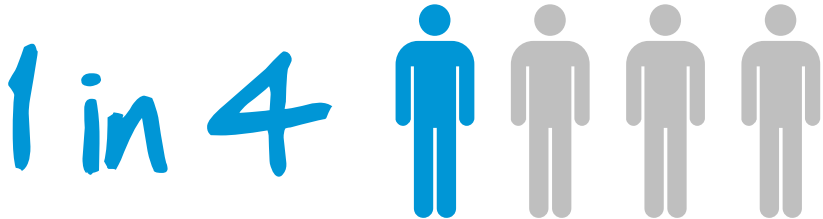
COLLEGE STUDENTS

FEEL THAT ONCE THEY BEGIN WORKING, IT WILL BE THEIR RIGHT—MORE THAN A PRIVILEGE—TO BE ABLE TO WORK REMOTELY WITH A FLEXIBLE SCHEDULE



COLLEGE STUDENTS

BELIEVE IT IS UNNECESSARY TO BE IN THE OFFICE REGULARLY



COLLEGE STUDENTS

FEEL THEIR PRODUCTIVITY WOULD INCREASE IF THEY WERE ALLOWED TO WORK FROM HOME OR REMOTELY

Connectivity Anywhere on Anything: Attitudes Toward Workplace Flexibility and Remote Network Access



57%

OF EMPLOYEES

CAN SEAMLESSLY CONNECT TO THEIR CORPORATE NETWORK FROM REMOTE LOCATIONS

BUT ONLY

28%

OF EMPLOYEES

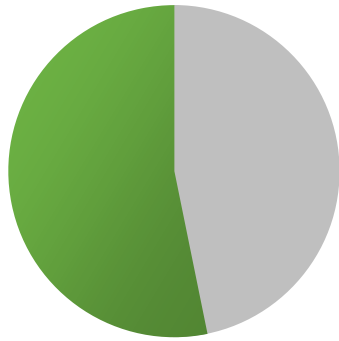
CAN DO SO AT ANYTIME, FROM ANY LOCATION

43%

OF EMPLOYEES

CONSIDER THIS ABILITY TO BE A CRITICAL FUNCTION OF THEIR JOBS

Connectivity Anywhere on Anything: Attitudes Toward Workplace Flexibility and Remote Network Access



MORE THAN
HALF

OF COLLEGE STUDENTS
AND EMPLOYEES

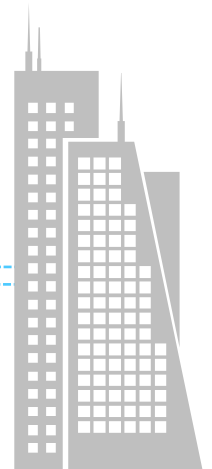
WANT TO ACCESS CORPORATE NETWORKS
USING THEIR HOME COMPUTERS AND
PERSONAL MOBILE DEVICES



63%
HOME
COMPUTERS



51%
PERSONAL MOBILE DEVICES



- In the future, the next generation of the world's workforce expects to access corporate networks and applications on numerous non-company devices, such as car navigation screens, seatback screens on airplanes, or televisions

Summary

- The growing use of the Internet and mobile devices in the workplace is creating a significant impact on job decisions, hiring and work-life balance
- The ability to use social media, mobile devices, and the Internet more freely in the workplace is strong enough to influence job choice, sometimes more than salary
- Mobile networking, device flexibility, and the blending of personal and work lifestyles are components of a work environment that will determine which companies land the top talent



