



The Cisco Connected World Report

Employee Expectations, Demands, and Behavior –
Accessing Networks, Applications, and Information
Anywhere, Anytime, and with Any Device
October, 2010

Methodology

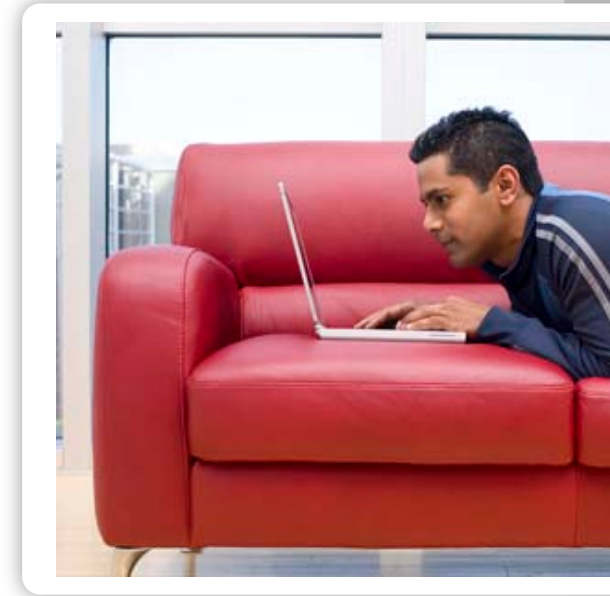
Timing and Sample Qualifications

- 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: US, 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



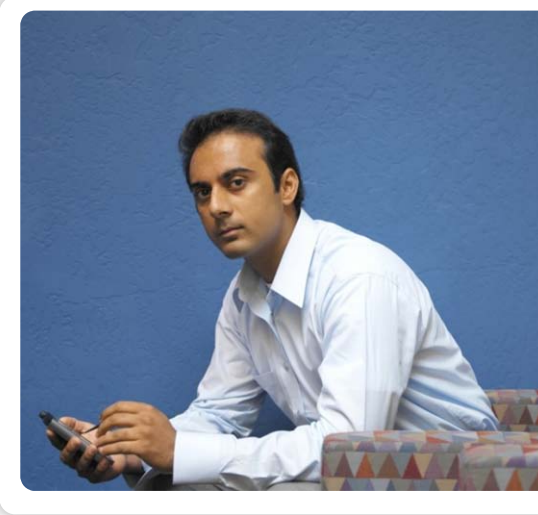
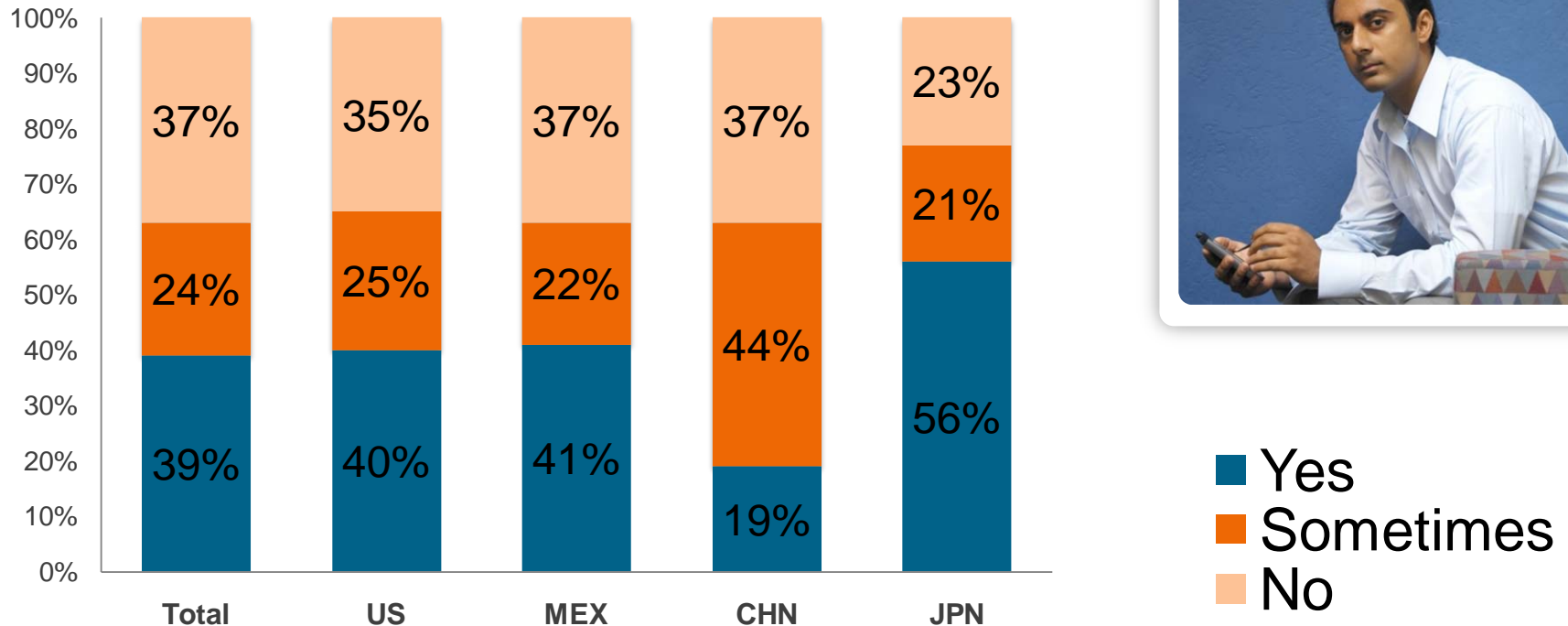
Key Findings

- Employees expect greater mobility in the workplace
- Despite down economy, employees value flexibility higher than salary – all else being equal
- Borders between professional and private continue to blur – work can be anywhere; over any device
- Wireless networks increasingly perceived as mission-critical and a requirement for doing business
- Mobile device proliferation is driving investment in wireless networks; Employees starting to rely on more than one mobile data device
- Emerging markets like China, India, and Mexico at the leading edge of the mobility market transition
- US lags behind in many areas, although France and Germany often times far behind



Work is an Activity, No Longer a Place

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



61% of employees globally believe they don't need to be in an office to be productive

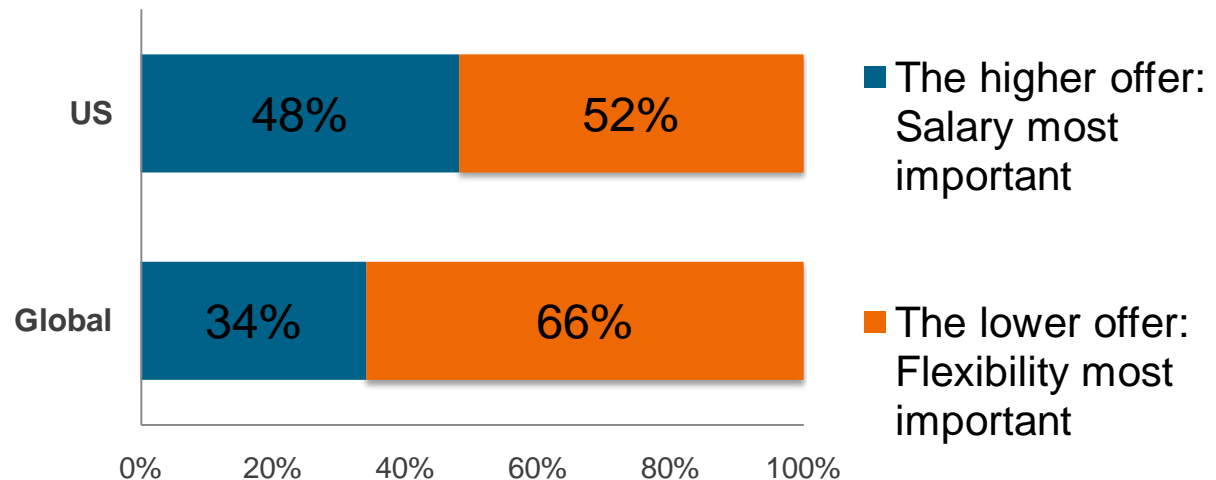
Employees Place Value on Mobility



Q. You received offers from two organizations that are equal in terms of opportunity and reputation...

Offer A: Higher salary, but no workplace flexibility

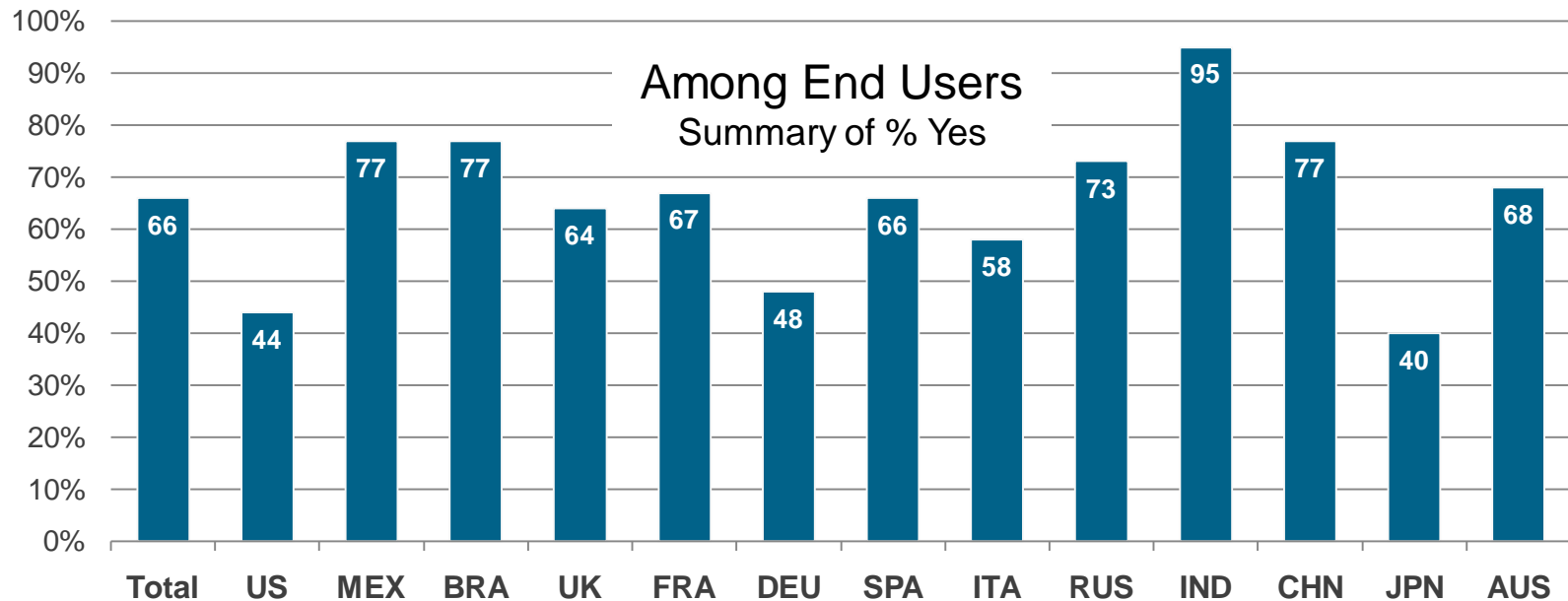
Offer B: Lower salary, with workplace flexibility



2/3 of employees globally place a higher value on workplace flexibility than salary

Blurring the Lines Between Professional and Personal

Q. Do you believe company-issued devices should be available for both work and play?



About two-thirds of end users globally agree that company-issued devices should be available for both work and play.

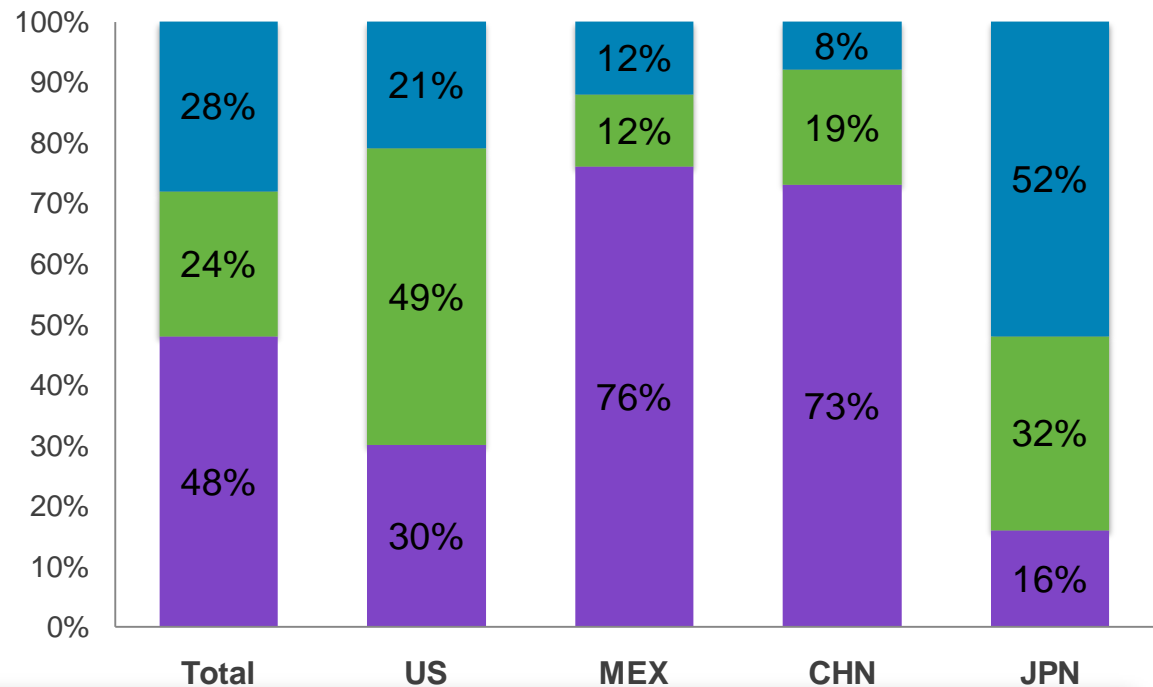
The US is a laggard, with only 44% believing that company-issued devices should be used for work and personal.

Wireless Gradually Becoming Critical to Business Operations



Q. Is your corporate wireless network mission-critical to your company's operations and productivity?

■ Yes
■ No
■ Don't Know

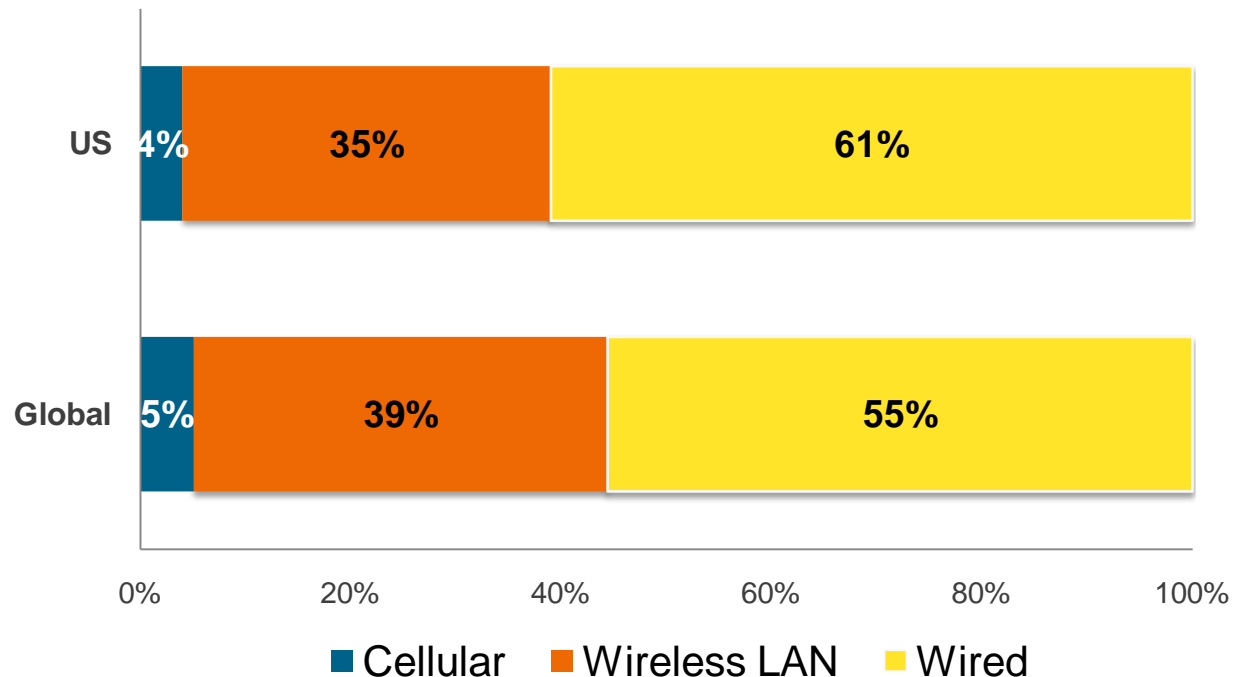


~50% of global enterprises consider WLANs to be mission critical to business operations

Wireless Emerging as a Primary Network



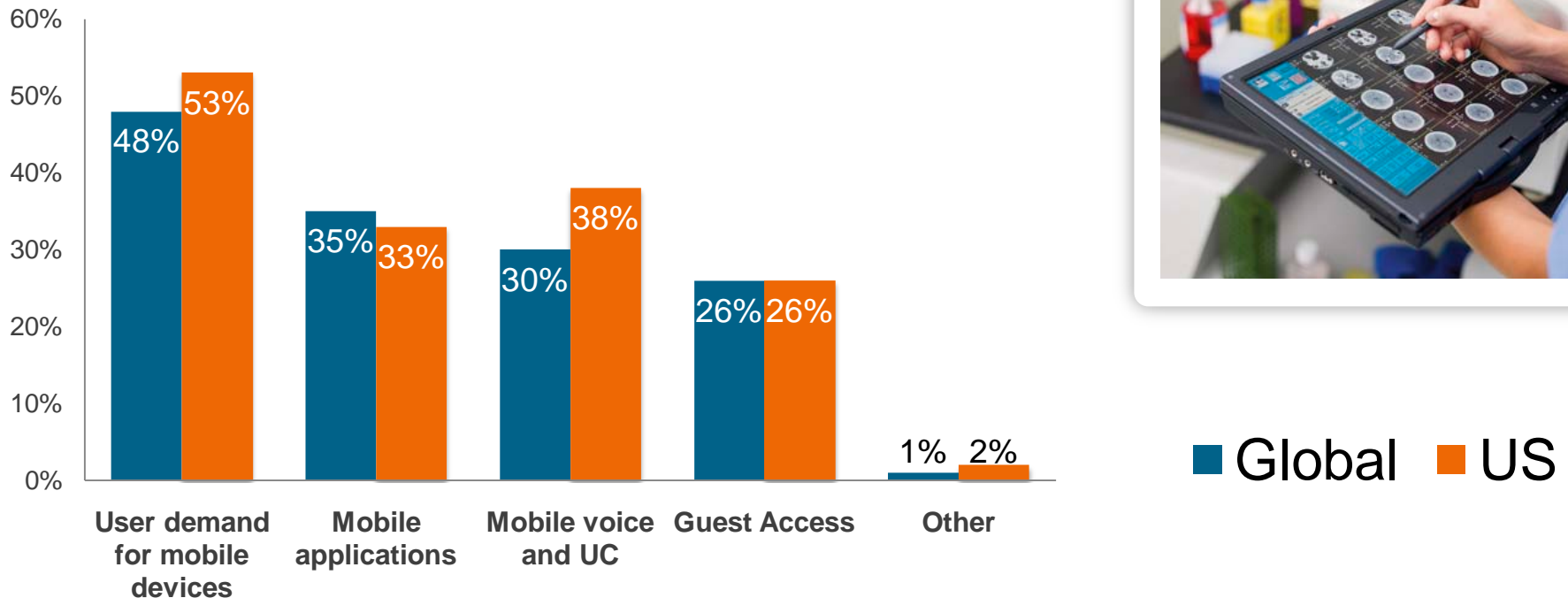
Q. What is your primary network connection when working on location at your company?



4 out of 10 of employees globally connect to the Wireless LAN as a primary network

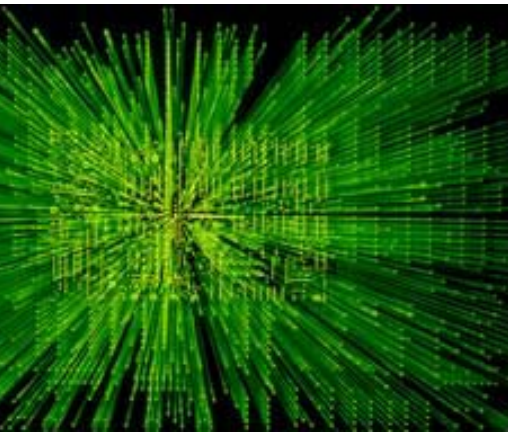
Mobile Device Growth Driving WLAN Investments

Q. What are the primary drivers for wireless LAN (WLAN) adoption in your enterprise?



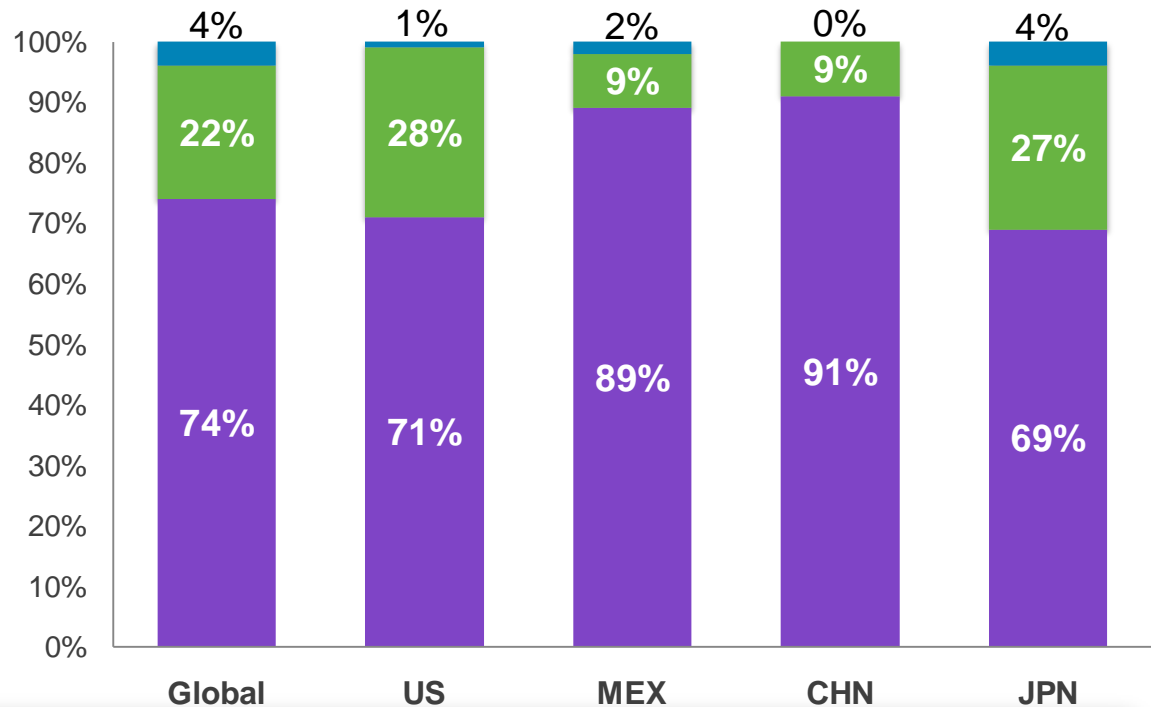
Supporting mobile devices is driving incremental investments in Wireless LANs

Wireless Interference is Impacting WLAN Performance



Q. Is your corporate network performance impacted by wireless interference?

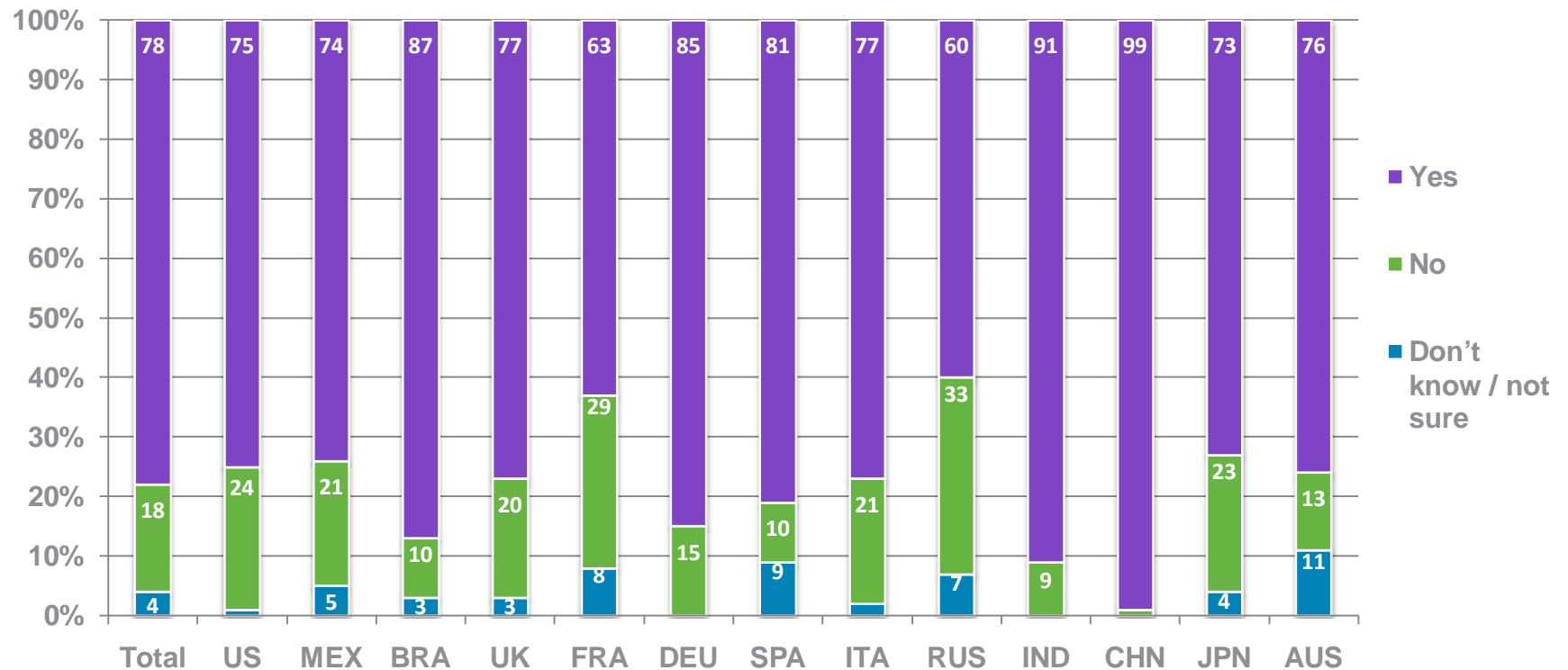
- Yes
- Not at All
- Don't Know



Three quarters of global enterprises are experiencing WLAN performance issues caused by RF interference

Wireless Access Critical for Out of Office Productivity

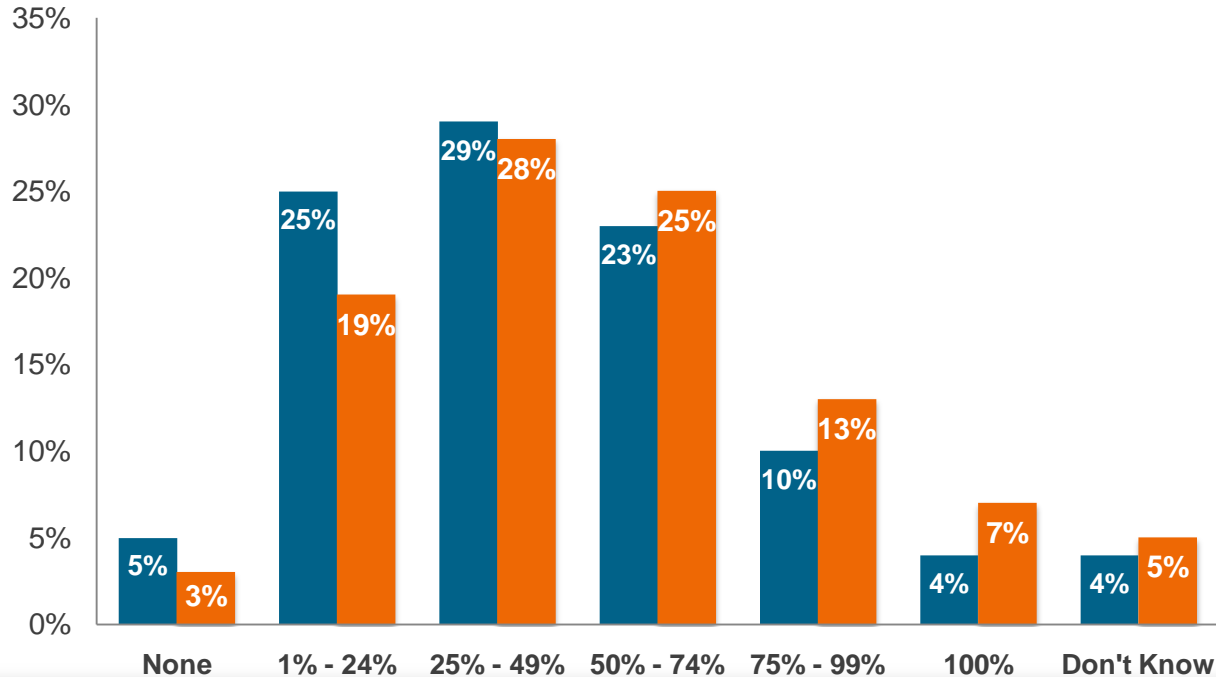
Q. Do you rely on cellular or WLAN connectivity to perform your job when outside of the office?



More than 4 in 5 End Users globally rely on cellular or WLAN connectivity to perform their job when outside of the office.

Smart Phones Emerging as Primary Device

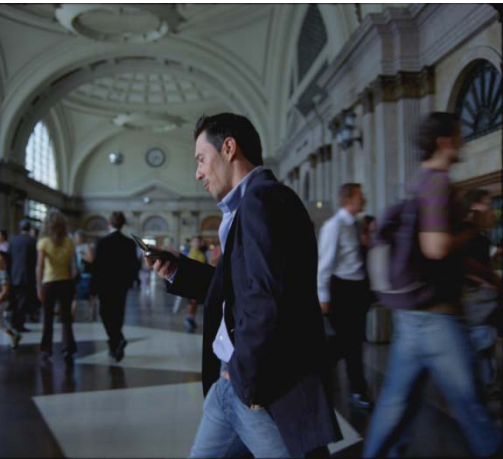
Q. What percentage of your company's mobile workers use a smart phone as their primary communication device?



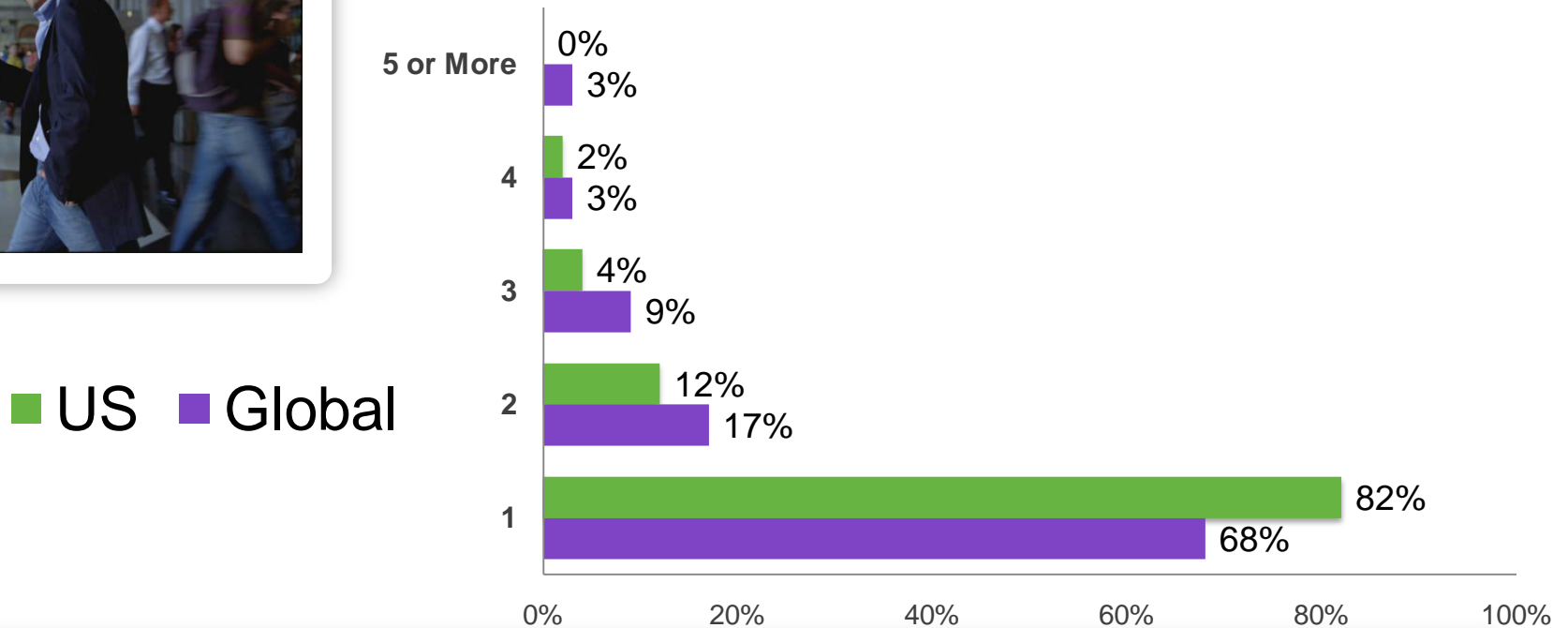
■ Global
■ US

More than one out of three IT professionals worldwide (37%) said that at least half of their end users rely on smartphones as their primary communication device

Devices Used During the Workday



Q. How many [data] devices (e.g. PC, laptop, smartphone, iPad, etc.) do you use during your typical workday?



32% of employees globally now rely on more than one mobile data device during their typical workday

Summary

- Mobility is going mainstream in the workplace
- Wireless access is critical for productivity both inside and outside the enterprise
- Mobile devices and applications driving increased investment in wireless infrastructure
- Desire for the flexibility that mobility delivers is growing and for many is more important than salary
- Customer needs driving Cisco's BN strategy, architecture, offerings





CISCO *together*

Office Presence & Productivity

- Just over one-third of End Users indicate they need to be in the office to be more productive, while two-thirds of respondents find it unnecessary to be in the office to do their work

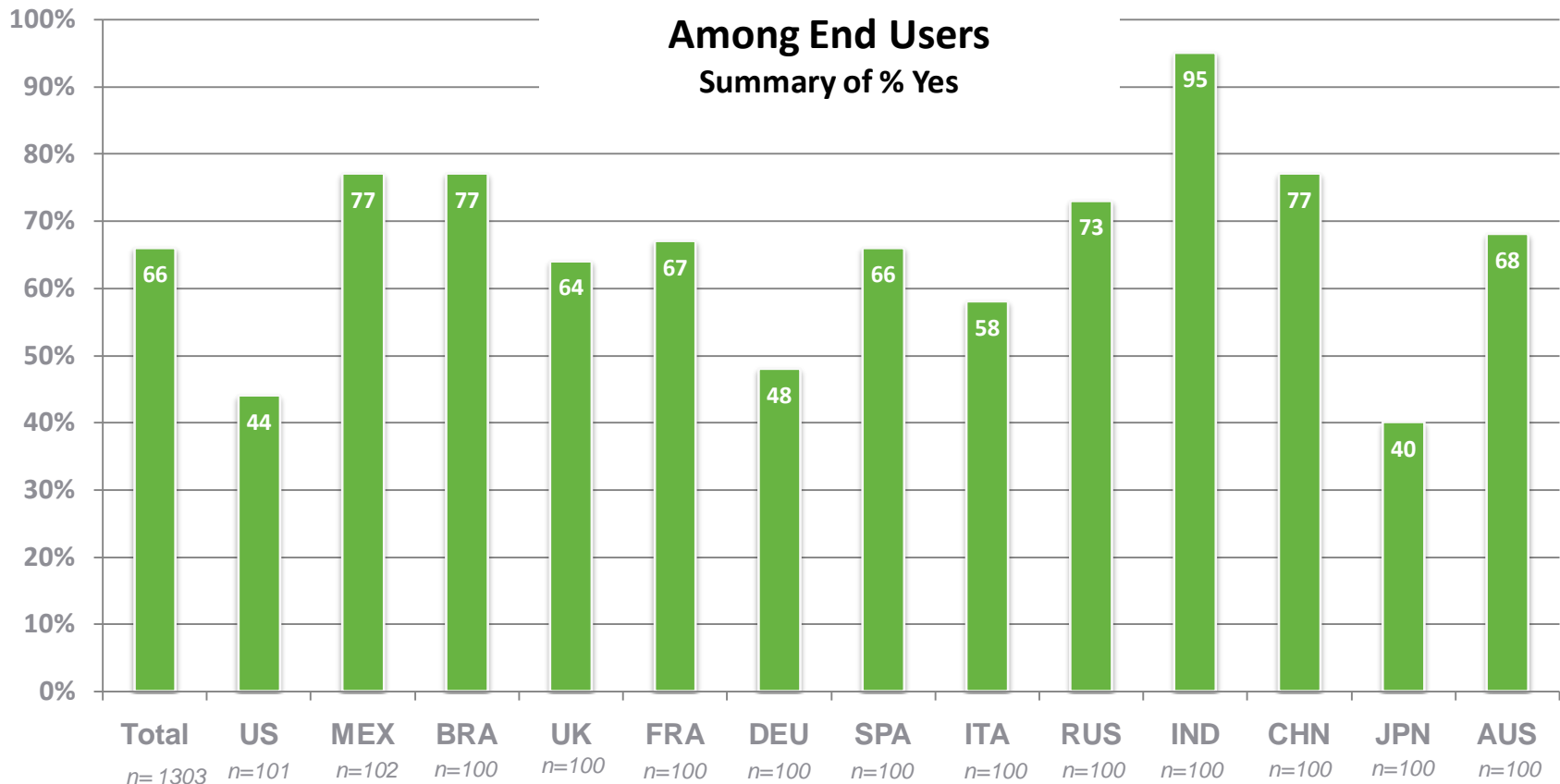
Among End Users %	Total (n=1303)	US (n=101)	MEX (n=102)	BRA (n=100)	UK (n=100)	FRA (n=100)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=100)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Yes, it's necessary for me to make decisions more effectively and efficiently - nothing replaces daily in-person interaction	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

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

Any Device for Anything

- 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.” (survey participant comment)



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

Value of Remote Access

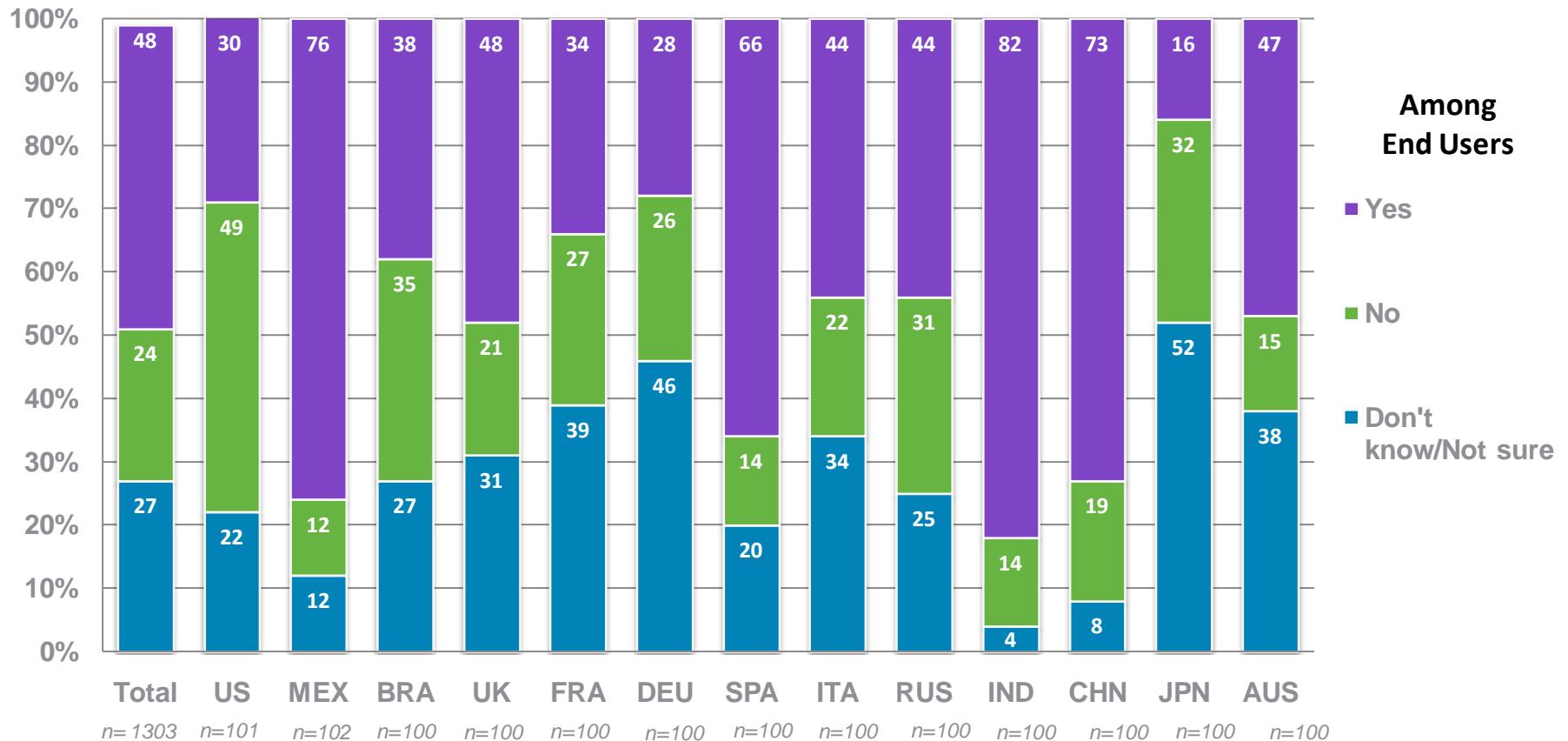
- Given a scenario where End Users have to choose between a job opportunity with a slightly higher salary (+10%) that restricts remote access and an opportunity with a slightly lower salary (-10%) that allows flexible access, most would take the lower offer.

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

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

Wireless Network & Productivity

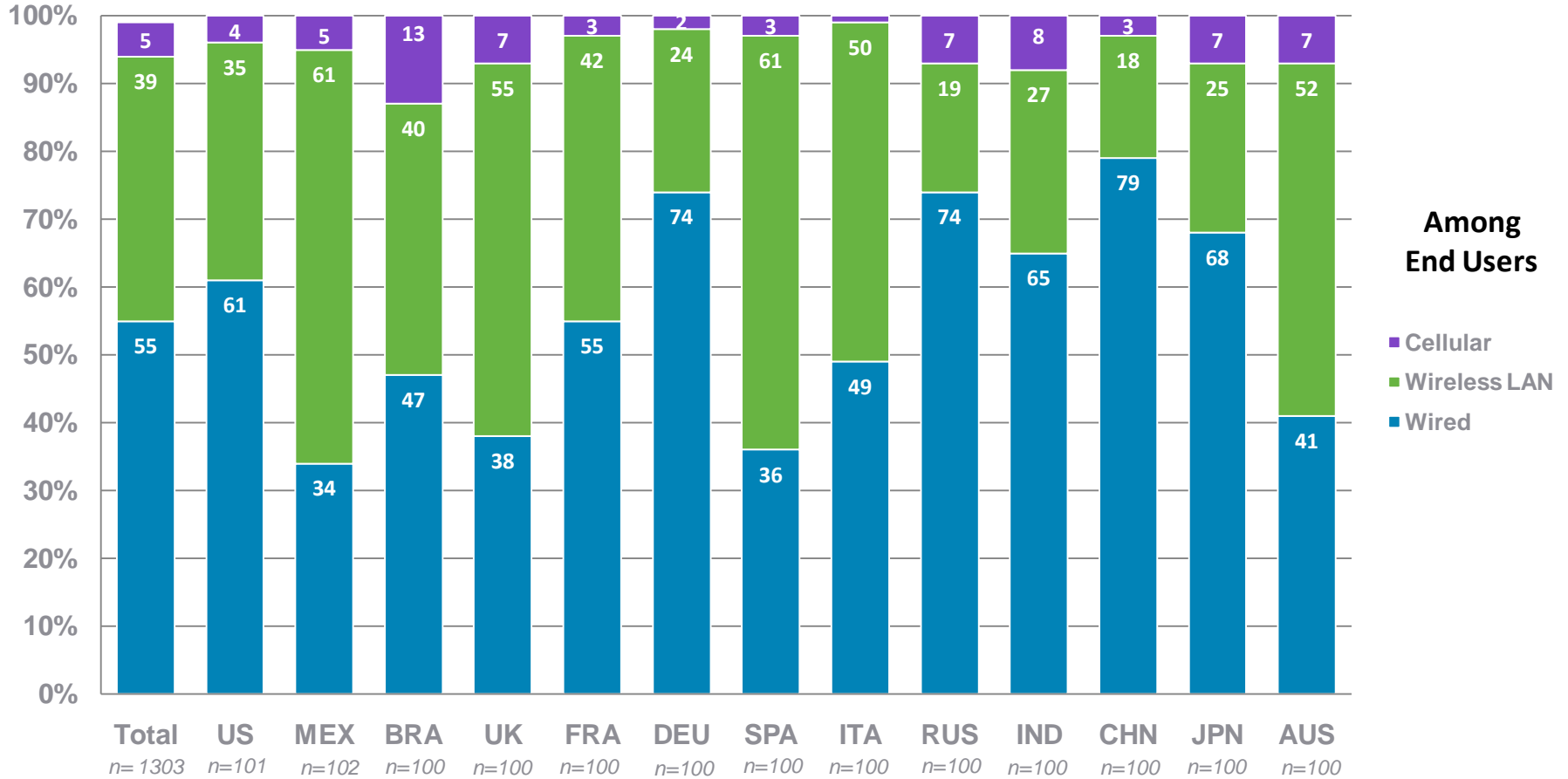
- Roughly half (48%) of End Users agree that their corporate wireless network is mission-critical to their company's operations and productivity – particularly those in India, Mexico, China and Spain.
- Relative to other countries, a significantly larger proportion of End Users in the US indicate their corporate wireless network is not mission-critical to their company's operations and productivity.



Q. Is your corporate wireless network mission-critical to your company's operations and productivity?

Primary Network Connection

- While more than half of End Users indicate the primary network connection when working on location at their company is wired, about 4 in 10 indicate it is wireless LAN.
- Relative to other countries, significantly larger proportions of End Users in Mexico and Spain have a wireless LAN connection.



Q. What is your primary network connection when working on location at your company?

Primary Drivers for Wireless LAN Adoption

- The number one driver of adoption of WLAN technology is demand by End Users for connectivity to mobile devices.

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)
Satisfy user demand for mobile device connectivity	48	53	57	47	49	40	42	47	37	44	52	77	35	41
Enable new mobile applications and business processes (e.g. mobile point-of-sale in retail stores)	35	33	47	45	30	32	33	35	35	27	35	40	32	32
Support for mobile voice and unified communications	30	38	24	33	33	19	32	28	22	22	39	41	24	33
Guest access	26	26	21	27	26	38	30	16	26	23	26	41	15	21
Other	1	2	0	0	2	1	2	3	0	0	0	0	5	0

Q. What are the primary drivers for wireless LAN (WLAN) adoption in your enterprise? (Select all that apply)

Impact of Wireless Interference

- About 3 in 4 ITDMs, driven by significantly larger proportions in India, China and Mexico, indicate their corporate network performance is impacted by wireless interference.
- Relative to other countries, significantly larger proportions of ITDMs in India indicate that the impact of wireless interference is a major issue for their company's network performance.

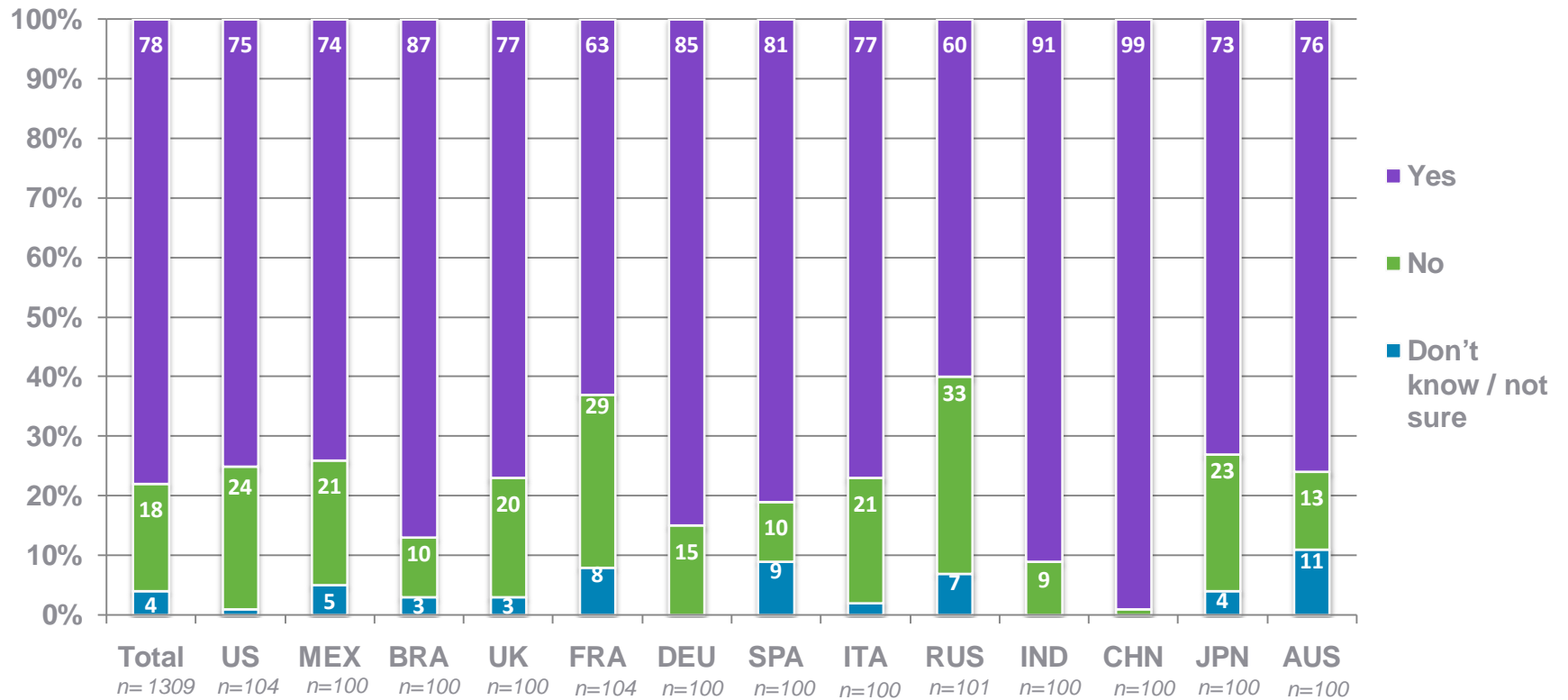
Among IT Decision Makers %	Total (n=1309)	US (n=104)	MEX (n=100)	BRA (n=100)	UK (n=100)	FRA (n=104)	DEU (n=100)	SPA (n=100)	ITA (n=100)	RUS (n=101)	IND (n=100)	CHN (n=100)	JPN (n=100)	AUS (n=100)
Yes	74	71	89	65	75	79	63	70	73	56	94	91	69	74
Not at all	22	28	9	31	19	16	34	28	26	33	5	9	27	19
Don't know / not sure	4	1	2	4	6 K	4	3	2	1	12	1	0	4	7

Q. Is your corporate network performance impacted by wireless interference? (Select one)

Reliance on Cellular / WLAN Connections

- More than 3 in 4 End Users rely on cellular or WLAN connectivity to perform their job when outside of the office.
- The vast majority of ITDMs, driven by significantly larger proportions in China, India and Brazil, rely on cellular or WLAN connectivity to perform their job when outside of the office.

Among IT Decision Makers



Q. Do you rely on cellular or WLAN connectivity to perform your job when outside of the office? (Select one)

Devices Used During the Workday

- More than 2 in 3 End Users, driven by significant proportions of End Users in Germany, Japan and the US, use only 1 device during a typical workday.
- Relative to other countries, significantly larger proportions of End Users in India and Mexico use more than 1 device at work.

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)
1	68	82	58	61	74	74	87	69	72	68	8	79	83	71
2	17	12	30	20	13	21	7	21	15	21	24	17	10	15
3	9	4	6	10	7	2	4	7	5	8	45	3	4	10
4	3	2	3	2	2	3	1	3	5	3	11	1	0	1
5 or more	3	0	3	7	4	0	1	0	3	0	12	0	3	3

Q. How many devices (e.g. PC, laptop, smartphone, iPad, etc.) do you use during your typical workday?

Use of Smartphones

- About 3 in 10 ITDMs, driven by significantly large proportions in India and Italy, indicate that 25%-49% of their company's mobile workers use a smartphone as their primary communication device.

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	5	3	2	0	1	4	4	1	5	17	0	0	19	5
1% to 24%	25	19	15	18	24	33	43	22	25	48	19	11	30	14
25% to 49%	29	28	22	31	27	26	28	33	42	16	47	33	24	24
50% to 74%	23	25	25	26	24	23	17	20	16	13	30	36	19	27
75% to 99%	10	13	22	13	10	8	6	12	8	1	3	13	2	24
100%	4	7	10	8	6	0	1	4	2	0	1	5	0	3
Don't know / not sure	4	5	4	4	8	7	1	8	2	6	0	2	6	3

Q. What percentage of your company's mobile workers use a smartphone as their primary communication device? (Select one)

Use of Personal Devices At Work

- While most End Users indicate using just one personal device (defined as a smartphone, tablet device, or personal laptop) during the typical workday, nearly 1 in 3 use more personal devices.
- Relative to other countries, significantly larger proportions of End Users in Mexico and India use more than 1 device at work that was not issued by their company.

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)
1	68	82	59	61	74	74	86	69	73	69	8	79	83	71
2	18	12	30	20	13	21	8	21	15	21	24	17	10	15
3	9	4	6	10	7	2	4	7	5	6	45	3	4	10
4	3	2	3	2	2	3	1	3	5	2	11	1	0	1
5 or more	3	0	3	7	4	0	1	0	3	1	12	0	3	3

Q. How many of these devices are not company-issued (e.g. they may be your own or that of a spouse, friend, co-worker, etc.)?