

# 2011 Cisco Connected World Technology Report

# 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.

# Detailed Findings

## The Internet



# Primary Way of Getting Information and News

The Largest Proportion of College Students Indicate that Their Laptop Is Their Primary Way of Getting Information and News

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	45	49	60	46	20	64	48	52	27	27	39	35	67	48	46
Desktop computer	22	19	13	22	51	9	7	16	18	48	38	15	21	12	18
TV	13	16	8	15	9	11	23	9	15	12	15	17	2	18	15
Smartphone	10	12	10	5	4	9	9	8	36	4	3	10	6	10	11
Newspapers, magazines or books in print e.g. paper, not online	7	1	7	9	10	2	10	7	1	4	2	23	2	7	9
Radio	2	2	2	0	0	3	3	6	1	1	3	0	0	0	1
Tablet	1	1	0	2	6	0	0	0	2	4	0	0	3	3	0
None of the above	1	0	0	1	0	2	0	2	0	0	1	0	0	3	0

Q. What is your primary way of getting information and news? (Select One)

# Primary Way of Getting Information and News

The Largest Proportion of End Users Indicate that Their Laptop Is Their Primary Way of Getting Information and News

Among End Users %	Total (n=1441)	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	36	44	30	46	24	46	27	38	26	23	38	40	46	42	30
Desktop computer	26	23	26	25	52	18	15	24	26	37	31	14	41	18	22
TV	16	8	15	9	12	10	27	19	21	21	22	16	4	22	15
Smartphone	11	16	12	15	3	18	13	7	11	3	3	13	6	11	23
Newspapers, magazines or books in print e.g. paper, not online	5	2	7	1	5	4	5	1	11	9	1	18	0	2	6
Radio	4	5	9	1	0	4	12	10	3	1	2	0	2	2	5
Tablet	2	0	1	3	4	0	1	0	2	6	3	0	2	3	0
None of the above	0	2	0	0	0	1	0	1	0	0	0	0	0	0	0

Q. What is your primary way of getting information and news? (Select One)

# Buying Books

More than One-Third of College Students from the Total Sample Indicate They Last Bought a Physical Book at a Bookstore Within the Past Month, Driven by a Significantly Large Proportion in Spain and Japan.

- About 1 in 3 College Students from Brazil and Italy indicate it has been at least 2 years since they last purchased a physical book.
- Relative to other countries, a significantly larger proportion of College Students in Brazil indicate that the last physical book they purchased was 4–5 years ago.

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)
In the past month	37	36	31	37	30	38	40	45	51	30	31	30	47	55	25
Between 1 and 12 months ago	42	38	50	41	36	38	49	44	38	37	42	49	41	33	52
Two to three years ago	11	14	11	11	13	19	9	6	2	13	9	11	12	10	14
Four to five years ago	6	6	4	5	19	3	2	4	7	11	10	4	0	1	6
I have never purchased a physical book in a bookstore	4	6	5	7	2	2	0	1	2	9	8	7	0	1	3
<b>Net: 2+ years ago</b>	<b>21</b>	<b>26</b>	<b>20</b>	<b>23</b>	<b>34</b>	<b>24</b>	<b>11</b>	<b>11</b>	<b>11</b>	<b>33</b>	<b>27</b>	<b>22</b>	<b>12</b>	<b>12</b>	<b>23</b>

Q. When was the last time you bought a physical book at a bookstore (not a textbook for college classes)?

# Buying Books

Nearly Half (43%) of End Users Last Bought a Book at a Bookstore Within the Past Month, Driven by a Significantly Large Proportion in Spain and Japan.

- No less than a quarter of End Users from India and Australia last purchased a physical book at a bookstore more than two years ago.

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)
In the past month	43	28	40	45	43	39	44	37	66	51	32	34	47	64	30
Between 1 and 12 months ago	42	50	41	42	46	50	43	48	27	41	46	40	44	28	45
Two to three years ago	9	13	13	11	9	6	7	5	5	4	15	16	5	6	13
Four to five years ago	4	8	2	1	2	5	3	8	0	2	7	7	3	0	7
I have never purchased a physical book in a bookstore	2	1	4	1	0	0	3	2	2	2	0	4	1	2	5
<b>Net: 2+ years ago</b>	<b>15</b>	<b>22</b>	<b>19</b>	<b>13</b>	<b>11</b>	<b>11</b>	<b>13</b>	<b>15</b>	<b>7</b>	<b>8</b>	<b>22</b>	<b>27</b>	<b>9</b>	<b>8</b>	<b>25</b>

Q. When was the last time you bought a physical book at a bookstore (not a textbook for college classes)?

# The Internet as a Necessity

More than Half of College Students Indicate They Could Not Live Without the Internet, It Is an Integral Part of Their Daily Life.

- Relative to other countries, significantly larger proportions of College Students in China, Italy and Brazil could not live without the internet.

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)
I could live without the Internet, the Internet is not an integral part of my daily life	8	7	7	8	3	3	4	4	8	7	18	20	4	7	4
I could live without the Internet but it would be a struggle based on my lifestyle	37	35	39	58	31	33	32	40	28	24	52	30	25	51	38
I could not live without the Internet, it is an integral part of my daily life	55	58	54	34	66	64	64	56	64	69	30	50	71	42	58

Q. Which of the following statements best describes your views on the Internet? (Select one)



# The Internet as a Necessity

More than 6 in 10 End Users Indicate They Could Not Live Without the Internet, It Is an Integral Part of Their Daily Life.

- Relative to other countries, significantly larger proportions of End Users in China, Brazil, the US and the UK could not live without the Internet.

Among End Users %	Total (n=141)	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)
I could live without the Internet, the Internet is not an integral part of my daily life	6	6	1	7	5	5	9	5	6	4	16	10	4	6	4
I could live without the Internet but it would be a struggle based on my lifestyle	31	21	39	33	20	22	23	49	27	37	46	29	18	38	38
I could not live without the Internet, it is an integral part of my daily life	62	73	60	60	75	73	68	46	67	59	38	61	78	56	58

Q. Which of the following statements best describes your views on the internet? (Select one)

# Importance of the Internet

About One-Third (32%) of College Students Indicate the Internet Is as Important to Them as Water, Food, Air and Shelter.

- Nearly 2 in 3 College Students in China and Brazil agree that the Internet is as important to them as water, food, air and shelter.

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, it is that important to the way I live my life	32	32	19	16	65	22	13	18	50	50	19	41	64	28	18
No, but the Internet is pretty close	49	37	58	63	32	44	39	65	37	34	76	53	31	62	49
No, the Internet is not that important in my life	19	31	23	21	3	34	48	17	14	16	5	6	5	10	33

Q. Do you consider the internet as important to your life as water, food, air, and shelter?

# Importance of the Internet

Similar to College Students, About One-Third (32%) of End Users Indicate the Internet Is as Important to Them as Water, Food, Air, and Shelter. Roughly Half (47%) Indicate the Internet Is Not as Important—but that It's Pretty Close.

- About 7 in 10 End Users in China agree that the Internet is as important to them as water, food, air and shelter.

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 is that important to the way I live my life	32	15	16	44	61	6	10	12	48	30	23	37	69	48	28
No, but the Internet is pretty close	47	58	47	38	31	57	39	76	34	44	72	56	28	44	37
No, the Internet is not that important in my life	21	27	37	18	8	37	51	12	18	26	5	7	3	8	35

Q. Do you consider the internet as important to your life as water, food, air, and shelter?

# Most Important Technology in Daily Life

Nearly Half (46%) of College Students Indicate Their Laptop Is Most Important to Them in Daily Life.

- More than one-third of College Students in Spain and the UK, indicate that their Smartphone is most important in daily life.

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	46	43	50	59	27	49	54	52	36	24	43	50	66	46	43
Desktop computer	20	17	11	21	52	6	6	12	17	42	29	23	18	11	17
Smartphone	19	20	28	8	8	36	25	13	40	13	12	12	13	13	26
TV	6	6	5	7	6	3	8	8	5	10	2	4	0	10	6
Newspapers, magazines or books in print e.g. paper, not online	4	3	4	4	4	1	3	8	2	3	4	8	1	7	1
Radio	1	4	0	0	0	0	2	3	0	0	2	1	0	1	0
Tablet	1	0	0	0	3	0	1	0	0	5	3	1	3	1	1
None of the above	4	7	3	2	1	5	1	4	1	3	5	2	0	12	6

Q. Which of the following is most important to you in your daily life? (Select one)

# Most Important Technology in Daily Life

The Largest Proportion of End Users Indicate Their Laptop Is Most Important to Them in Daily Life.

- In the US and Australia, the largest proportions of End Users indicate that their Smartphone is most important.

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)
Laptop	37	25	31	42	32	43	38	44	33	15	40	51	51	44	24
Desktop computer	25	19	20	30	47	12	12	24	24	39	35	20	32	18	13
Smartphone	19	37	26	18	4	31	21	7	12	18	9	20	11	15	42
TV	8	11	9	2	4	7	15	12	15	7	8	3	1	15	8
Newspapers, magazines or books in print e.g. paper, not online	4	2	5	2	9	1	2	6	9	9	1	5	1	3	3
Radio	2	1	3	2	0	1	4	3	0	1	3	0	1	1	2
Tablet	2	1	1	2	2	1	0	0	6	6	3	1	1	2	0
None of the above	3	4	5	2	2	5	8	4	0	5	1	0	2	2	8

Q. Which of the following is most important to you in your daily life? (Select one)

# Internet vs. Social Activities

Given a Choice Between the Internet, Social Activities, Romance, and Music, the Largest Proportion of College Students Indicate that the Internet Is Most Important in Their Daily Life.

- 72% of College Students in Brazil indicate that the Internet is most important.
- France is the only country where College Students place greater importance on dating than using the Internet.

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)
Internet	40	33	38	39	72	30	7	30	55	46	28	54	59	24	38
Going out with friends/partying	25	23	24	25	17	33	28	36	28	15	24	25	21	25	26
Dating	13	8	16	15	7	5	54	4	4	25	25	3	6	10	7
Music	10	12	8	16	2	10	6	21	3	9	10	12	4	13	13
None of the above	12	24	15	5	2	22	5	9	10	5	13	7	11	29	17

Q. Which of the following is most important to you in your daily life? (Select one)

# Internet vs. a Car

Most College Students (64%) from the Total Sample Would Prefer to Have Access to the Internet than a Car.

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)
Access to the Internet	64	46	67	59	63	72	47	75	67	66	37	77	85	84	56
A car	36	54	33	41	37	28	53	25	33	34	63	23	15	16	44

Q. If you could only have one of the following, what would be more important to you in your life?

# Online Shopping vs. In-Store Shopping

The Majority (61%) of College Students Shop More in Person Rather than Online.

- At least 3 in 4 Students from Russia, France, Mexico and Japan shop more in store than online.
- In contrast, most Students from Brazil and China buy more online instead of in person.

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)
Buy more in person than online	61	54	74	75	34	50	76	45	50	54	89	72	40	75	67
Buy more online than in person	39	46	26	25	66	50	24 J	55	50	46	11	28	60	25	33

Q. When you shop, what do you do typically?



# Detailed Findings

## Social Media



# Facebook vs. Social Activities

More than 1 in 4 (27%) College Students Prioritize Keeping up to Date on Facebook Above Dating, Listening to Music and Going to Parties. However, a Larger Proportion (39%) Indicate that Spending Time with Friends Is Most Important on a Typical Day.

- Significantly large proportions of College Students in Brazil, Spain, Italy, India, and China indicate that keeping up to date on Facebook is most important.

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)
Spending time with friends	39	36	47	37	30	60	45	58	29	26	39	31	23	39	43
Keeping up to date on Facebook	27	18	12	35	50	19	8	10	54	38	10	45	41	6	22
Going on a date	10	10	8	9	10	2	21	2	5	20	19	2	17	9	5
Listening to my favorite music	10	12	12	10	6	9	8	18	4	8	18	12	5	15	10
Going to a party	2	6	0	4	2	1	6	0	1	3	1	2	5	0	0
None of the above	12	18	22	5	4	9	12	12	7	5	13	8	10	32	20

Q. On a typical day, what is most important to you? (Select one)

# Social Media Distractions

Largely Influenced by Nearly a Quarter Who Are Distracted Three to Five Times, More than 4 in 10 (43%) College Students from the Total Sample Admit to Being Distracted or Interrupted by Social Media, IM, Phone Calls, or a Desire to Check Facebook Three or More Times in a Typical Hour.

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)
Never	16	11	10	12	20	7	19	16	19	12	15	11	14	48	9
Once	19	14	17	19	21	21	26	25	19	17	18	20	18	18	13
Twice	23	24	24	27	14	19	16	24	20	17	19	26	35	23	27
Three to five times	24	29	27	25	21	29	29	26	22	26	25	27	19	7	30
Six or more times	7	8	8	11	17	5	2	6	7	5	8	4	7	2	5
I lose count	12	14 G	15	6	7	19	8	3	12	23	16	12	8	3	17
<b>Net: Three or more times</b>	<b>43</b>	<b>51</b>	<b>50</b>	<b>42</b>	<b>45</b>	<b>53</b>	<b>39</b>	<b>35</b>	<b>41</b>	<b>54</b>	<b>49</b>	<b>43</b>	<b>34</b>	<b>12</b>	<b>52</b>

Q. Let's say that you need to focus on a project or homework assignment. In a typical hour, how many times are you distracted or interrupted by social media, IM, phone calls, a desire to check Facebook, etc.? (Select one)

# Accessing Facebook

About 8 in 10 (81%) College Students Indicate Accessing Their Facebook Page at Least Once a Day or More Frequently.

- Relative to other countries, College Students in Spain, Brazil and Italy tend to access their page most often because it is always up.

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)
<b>Net: At least once a day</b>	<b>81</b>	<b>79</b>	<b>75</b>	<b>91</b>	<b>82</b>	<b>89</b>	<b>77</b>	<b>76</b>	<b>88</b>	<b>84</b>	<b>85</b>	<b>92</b>	<b>73</b>	<b>46</b>	<b>82</b>
It's always up	17	16	12	18	25	20	13	10	39	24	14	18	9	3	13
At least once every 10 minutes	4	6	2	6	6	2	3	1	3	6	3	6	3	2	3
At least once an hour	12	11	10	12	10	16	8	4	9	24	15	12	11	7	16
At least a few times a day	33	33	38	36	15	42	39	49	24	3	41	38	33	24	40
Once a day	15	13	13	19	26	9	14	12	13	27	12	18	17	10	10
At least a couple times a week	11	15	17	6	13	6	12	12	9	5	8	7	18	15	9
I don't have a Facebook page	9	6	9	4	5	5	11	12	4	11	7	1	10	40	9

Q. During a typical day, how often do you access your Facebook page?

# Accessing Facebook

Most End Users Indicate Accessing Their Facebook Page at Least Once a Day or More Frequently.

- End Users in Mexico and Spain tend to access Facebook most frequently with about 1 in 4 mentioning that the page is always up.

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's always up	11	9	10	25	15	4	2	3	26	11	7	12	16	11	5
At least once every 10 minutes	3	1	0	8	3	0	1	1	8	4	2	4	4	1	1
At least once an hour	8	10	7	7	11	5	2	3	2	22	3	16	7	4	7
At least a few times a day	30	39	37	29	27	50	35	20	20	0	39	37	30	18	42
Once a day	21	17	15	23	26	17	23	14	29	44	18	23	9	13	20
At least a couple times a week	15	15	22	7	10	18	21	22	11	12	18	7	21	15	15
I don't have a Facebook page	12	9	9	1	8 C	7	16	37	4	7	13	2	13	38	10

Q. During a typical day, how often do you access your Facebook page?

# 'Friending' Co-Workers on Facebook

Seven in Ten End Users, Who Use Facebook, Have 'Friended' Either Their Colleagues, Manager or Both on Facebook.

- Relative to other countries, significantly larger proportions of End Users in Japan, France and Germany have not 'friended' co-workers because they like to keep work and personal life separate.

Among End Users Who Use Facebook %	Total (n=1236)	US (n=91)	CAN (n=91)	MEX (n=99)	BRA (n=92)	UK (n=94)	FRA (n=84)	DEU (n=63)	SPA (n=94)	ITA (n=93)	RUS (n=87)	IND (n=99)	CHN (n=92)	JPN (n=62)	AUS (n=95)
Yes, I have "friended" both my manager and my work colleagues	32	23	19	58	43	18	4	11	50	35	26	58	52	18	15
Yes but only my manager	5	4	2	14	25	1	2	0	12	0	0	6	1	5	0
Yes but only my work colleagues	33	40	48	13	17	48	40	38	21	42	40	21	21	19	54
No, I try to keep my work and personal life separate	30	33	31	15	14	33	54	51	17	23	33	15	26	58	32

Q. Have you "friended" your manager and work colleagues on Facebook?

# Accessing Twitter

More than 4 in 10 (42%) End Users from the Total Sample Have a Twitter Page. Those Who Do, Tend to Access the Page at Least Once a Day or More Often.

- Relative to other countries, significantly larger proportions of End Users in Mexico and Brazil are using Twitter. In China, considerably large proportions of End Users tend to use a Twitter equivalent called Weibo.

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's always up	6	4	2	21	15	0	0	1	16	3	0	2	11	8	2
At least once every 10 minutes	3	1	0	6	3	0	0	1	10	3	1	3	7	3	0
At least once an hour	4	3	1	4	14	3	1	0	3	11	1	6	8	3	1
At least a few times a day	9	6	5	20	14	5	2	2	9	0	5	14	21	15	6
Once a day	10	5	6	22	27	8	0	2	20	2	6	18	16	5	3
At least a couple times a week	10	6	11	8	11	11	3	4	8	9	13	13	24	11	11
I don't have a Twitter page	58	75	75	19	16	73	94	90	33	72	74	45	13	55	77

Q. During a typical day, how often do you access your Twitter page?

# Following Co-Workers on Twitter

Nearly 7 in 10 (68%) End Users, Who Use Twitter, Follow Either Their Colleagues, Manager or Both on Twitter.

Among End Users Who Use Twitter %	Total (n=595)	US (n=25*)	CAN (n=25*)	MEX (n=81)	BRA (n=84)	UK (n=27*)	FRA (n=6**)	DEU (n=10**)	SPA (n=66)	ITA (n=28*)	RUS (n=26*)	IND (n=56)	CHN (n=92)	JPN (n=45*)	AUS (n=24**)
Yes, I follow both my manager and my work colleagues	42	16	16	52	50	0	0	20	56	57	27	48	57	22	17
Yes but only my manager	10	20	4	23	21	0	17	0	21	0	0	5	0	0	0
Yes but only my work colleagues	16	24	16	12	15	30	33	20	12	21	27	18	10	13	29
No, I try to keep my work and personal life separate	32	40	64	12	13	70	50	60	11	21	46	29	34	64	54

Q. Do you follow your manager or your work colleagues on Twitter?



# Detailed Findings

## Use of Technology Devices

# 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.'

*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.)?

# 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.

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.

- 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)

# Desktop Computer Purchase Intent

Although One Quarter of Students Do Not Foresee Themselves Ever Buying a Desktop Computer 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	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, one of three End Users Do Not Intend to Buy 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?

# Expected Device Usage for Work

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

- 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

Half of End Users Indicate Using a Laptop 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.

# 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.

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?

# 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?

# Detailed Findings

## Remote Access: Expectations and Obstacles

# 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?

# 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)?

# Impact of Not Having Remote Access

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)

# 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.

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)



# 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.

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)

# Detailed Findings

## Attitudes Toward Remote Access



# Remote Access: A Right or a Privilege?

Three of 10 Students Believe that Being Able to Work Remotely, in Today's World, 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 3 of 10 End Users Believe that Being Able to Work Remotely Is a Right in Today's World.

- 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 Working Hours

In the Future, Almost Half of Students Would Like Unconventional Work Schedules.

- 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)?

# Attitudes Toward Office Presence and Productivity

One in Four Students from the Total Sample Feel that Being in the Office Is 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.

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

Almost One in Four Indicate That It Is Unnecessary 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, 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)

# Detailed Findings

## Impact of Devices and Access Flexibility on Recruitment



# Impact of Restricted Access on Recruitment

If Confronted With a Job Opportunity at a Company That Is Inflexible With Social Media Access, More Than Half (56%) Would Decline a Job Offer or Accept It And Find a Way to Circumvent the 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)
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)

# Salary vs. Device Use and Workplace Flexibility

For One in Three, the Most Important Aspect in Accepting a Job Offer Is Flexibility in Device Choice, Social Media Access, and Remote Working.

- 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)

# 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.

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?

# 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 Was 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?



# Salary vs. Freedom to Work Remotely

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

*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

## Two of Five Students Are More Likely to Accept the Lower Offer.

- 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

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?

# 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?

# Detailed Findings

## Attitudes Toward IT Restrictions



# Restricted Access

No Less than 3 in 10 End Users Indicate Their Company Restricts Access to Online Games and Social Networking Sites.

- Relative to other countries, significantly larger proportions of End Users in Russia indicate their company does not currently restrict access to any of these websites, applications or devices.

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)
Online games	37	36	31	50	44	37	27	28	39	31	38	51	51	20	28
Social networking sites (e.g. Facebook, Twitter, YouTube)	31	31	38	17	31	49	29	22	22	27	47	43	22	21	34
Blogging	22	19	22	27	32	31	20	16	17	15	25	35	18	11	17
IM	19	14	17	27	19	20	10	22	23	27	24	19	18	11	22
Web-based personal email	18	16	18	17	19	22	15	18	17	11	15	29	20	16	18
iPod/media player	15	9	11	25	23	16	12	12	14	19	8	29	6	9	12
Web portals	12	12	12	11	13	10	9	18	12	5	16	18	13	4	8
Non-company issued mobile phone (e.g. iPhone)	11	5	12	16	14	5	14	7	16	5	7	23	10	6	8
PC	11	5	9	16	11	9	10	8	12	7	6	20	16	16	8
iPad/tablet	10	8	10	8	10	9	14	14	20	4	6	12	7	7	12
Mac	8	5	7	16	6	7	9	13	9	1	10	14	7	5	5
None of these	25	29	28	28	25	18	31	32	20	27	34	12	21	18	27
Don't know / not sure	15	17	17	0	4	21	29	27	7 C	19	6	4	6	38	18

Q. To which of the following Web sites, applications, and/or devices does your company currently restrict access?

# Attitudes Toward Restricted Access

More than 4 in 10 End Users, Driven by Those in China, India and Brazil, Believe It Is in the Best Interest of a Company that These Websites, Applications, and Devices Are Restricted, but It Would Be Nice If the Company Would Be a Bit More Flexible for Work-Life Balance.

- Relative to other countries, significantly larger proportions of End Users in Mexico and Russia indicate their company needs restrictions because they would waste a huge amount of time if the sites were available.

Among End Users %	Total (n=845)	US (n=54)	CAN (n=55)	MEX (n=72)	BRA (n=71)	UK (n=62)	FRA (n=40*)	DEU (n=41*)	SPA (n=71)	ITA (n=54)	RUS (n=60)	IND (n=85)	CHN (n=78)	JPN (n=44*)	AUS (n=58)
Yes, it is in the best interest of the company in general, but it would be nice if the company would be a bit more flexible for work-life balance	42	35	42	32	52	39	43	49	39	28	32	54	59	41	33
Yes, my co-workers and I would waste a huge amount of time on these sites if available	33	30	33	51	30	27	43	20	44	33	48	27	27	30	22
No, the restrictions are not in the best interest of the company - we should be able to have access for work-life balance reasons	16	20	18	13	10	18	13	20	8	24	15	15	12	18	28
No, the restrictions are not in the best interest of the company - other businesses are benefitting from social media and information access on multiple devices and we are falling behind	9	15	7	4	8	16	3	12	8	15	5	4	3	11	17

Q. Do you believe it is in the best interest of the company that these Web sites, applications and devices be restricted? (Select one)

# 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 (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)
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)



# Attitudes Toward Corporate IT Policy

Half of End Users Indicate Their Company's IT Policy Could Use Some Slight Improvement or Updating.

- Relative to other countries, significantly larger proportions of End Users in China, Spain, Brazil and Mexico indicate their company's IT policy could use some improvements.
- One in five End Users in the US, and an even larger proportion in Japan, indicate they aren't sure if their company has an IT policy covering acceptable uses of company resources.

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)
Does not need any significant improvements or updates	21	23	23	24	29	24	28	24	14	16	19	22	11	22	20
Could use some slight improvement or updating	50	40	43	59	58	45	26	45	60	53	46	53	77	42	44
Needs to be significantly improved or updated	17	17	15	12	10	16	29	15	13	20	26	18	9	10	23
I don't know if my company has such a policy	13	20	19	5	3	16	17	16	12	11	9	7	2	26	13

Q. Which of the following best describes how you feel about your company's IT policy covering acceptable uses of company resources (e.g. desktops, laptops, tablets smart phones etc.)?

# Attitudes Toward Corporate IT Policy

More than 6 in 10 End Users Believe Their Organization's Corporate IT Policy Is Fair.

- The small proportion who believe their organization's corporate IT policy is unfair is driven by significantly large proportions of End Users in Russia, Japan and Italy.

Among End Users Who's Company Has an IT Policy %	Total (n=1235)	US (n=80)	CAN (n=81)	MEX (n=95)	BRA (n=97)	UK (n=85)	FRA (n=83)	DEU (n=84)	SPA (n=86)	ITA (n=89)	RUS (n=91)	IND (n=94)	CHN (n=104)	JPN (n=74)	AUS (n=92)
Fair	62	56	60	83	78	54	53	63	78	51	51	65	59	58	53
Unfair	16	19	12	11	12	11	11	10	12	24	26	19	14	26	21
Don't know/ Not sure	22	25	27	6	9	35	36	27	10	26	23	16	27	16	26

Q. If you are aware that your company has such a policy, do you feel it is...?

# IT Policy Adherence

The Vast Majority of End Users Admit They Break IT Policy to Varying Degrees.

Among End Users Who's Company Has an IT Policy %	Total (n=1235)	US (n=80)	CAN (n=81)	MEX (n=95)	BRA (n=97)	UK (n=85)	FRA (n=83)	DEU (n=84)	SPA (n=86)	ITA (n=89)	RUS (n=91)	IND (n=94)	CHN (n=104)	JPN (n=74)	AUS (n=92)
All of the time	30	34	28	51	31	34	43	27	47	27	24	21	9	30	21
Most of the time	50	53	60	33	51	44	39	58	36	51	54	50	77	47	46
Sometimes	15	11	9	13	16	14	17	13	14	15	18	20	11	19	20
Not very often	4	3	2	2	2	4	1	1	1	6	2	6	4	4	11
Never	1	0	0	2	0	5	0	0	2	2	2	2	0	0	3

Q. If you are aware that your company has such a policy, how often do you adhere to it?

# Reasons for Non Compliance

About One Third of End Users Who Do Not Always Adhere to Their Company's IT Policy Indicate They Are Not Doing Anything Wrong.

Among End Users Who Don't Always Adhere %	Total (n=245)	US (n=11**)	CAN (n=9**)	MEX (n=16**)	BRA (n=18**)	UK (n=19**)	FRA (n=15**)	DEU (n=12**)	SPA (n=15**)	ITA (n=20**)	RUS (n=20**)	IND (n=27*)	CHN (n=15**)	JPN (n=17**)	AUS (n=31*)
I'm not doing anything wrong	33	64	56	13	28	16	33	33	33	35	40	33	20	29	42
I need access to programs and applications not sanctioned by my company's IT policy to get my job done	22	36	22	44	17	16	13	8	20	15	25	26	27	12	23
My company's IT policy isn't enforced	19	36	67	13	6	11	7	17	13	5	30	30	20	12	23
I'm too busy to think about my company's IT policy	18	9	11	31	6	26	33	25	13	10	20	19	20	12	19
It is not convenient	16	36	22	6	11	11	20	17	7	5	25	15	20	12	19
My work computer is my only computer, and I use it for personal activity too	16	18	11	13	17	16	7	17	20	5	25	19	33	12	16
Other co-workers do not abide by corporate policy	16	18	11	25	6	5	20	33	13	10	20	15	7	12	23
I forget sometimes	15	18	11	13	22	21	0	8	13	10	10	22	20	18	13
My boss isn't watching me	14	27	11	13	0	16	13	25	7	10	20	7	7	12	29
None of the above	9	9	0	6	11	16	20	25	13	15	0	4	7	6	3

# Responsibility for Securing Work Devices and Data

More Than Half (52%) Believe They Are Not Responsible for Securing their Work Devices and Data – Service Providers and IT Are.

- More than half of End Users in France believe that IT is responsible for securing work devices and data.

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)
Me	39	32	32	62	50	32	17	36	52	45	19	51	36	55	32
IT	30	36	35	19	27	38	55	36	22	22	38	15	33	6	35
IT and the service provider	16	10	20	11	13	13	18	16	13	11	31	18	20	11	24
Service provider	6	11	3	7	5	4	4	3	7	12	1	11	8	9	2
Don't know/ Not sure	8	11	10	1	5	14	6	9	5	10	11	5	4	19	8

Q. Who do you believe is most responsible for securing your work devices and data?  
(Select one)

# Respect for IT

## One in Three End Users Indicate Their Company's IT Team Is Not Respected or Undecided by Its Employee Base

Relative to other countries, significantly larger proportions of End Users in Australia, the UK and Russia indicate their company's IT team is not respected by its employee base.

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)
Respected by its employee base	64	62	66	85	81	50	67	60	81	69	56	72	83	32	39
Not respected by its employee base	18	20	15	13	10	31	17	18	11	10	25	18	9	24	37
Don't know/ Not sure	17	18	19	2	9	19	16	22	8	21	19	10	8	44	25

Q. Do you feel that the IT team in your company is for the most part...?

# Detailed Findings

## Risky Technology Behaviors

# Unsupervised Use of Computer

More than 2 in 3 (70%) Students Have Allowed Their Family Members to Use Their Laptop, Tablet or Smartphone Without Supervision, While a Slightly Smaller Amount Have Allowed Their Friends to Do the Same.

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)
Family members	70	78	75	59	77	76	68	58	80	68	87	62	76	39	74
Friends	63	63	71	64	57	69	59	68	65	58	76	59	72	33	64
People who I don't know	4	5	5	3	1	1	1	1	11	2	6	9	4	0	2
I have never allowed other people to use my device without supervision	14	9	11	13	8	18	18	16	6	22	5	12	4	46	17

Q. Which of the following people have you allowed to use your laptop, tablet or Smartphone without supervision? (Select all that apply)



# Unsupervised Use of Computer

More than Half (56%) of End Users Have Allowed Someone to Use Their Company-Issued Computer Without Supervision—Particularly Those in China.

- More than half of End Users in Russia and China have allowed their coworkers to use their company-issued computer without supervision.

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)
Coworkers (excluding any installations or repairs conducted by members of your Information Technology staff)	32	23	19	33	41	25	16	28	41	33	51	36	61	16	25
Family members	21	15	11	30	21	15	12	10	20	21	39	24	50	10	12
Friends	16	10	5	23	17	11	3	11	19	10	28	22	39	10	11
Business partners	11	3	3	22	16	3	1	3	21	8	10	20	23	10	5
People who I don't know	4	1	1	11	1	0	3	2	8	8	4	4	5	2	1
I have never allowed other people to use my computer without supervision	44	62	70	27	30	56	68	59	24	43	19	35	8	64	58

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

# Extreme Behavior for Internet Access

Under Desperate Circumstances, at Least 1 in 5 College Students Have Either Asked Their 'Neighbor to Use Their Computer or Internet Access' or 'Paid an Outrageous Fee to Access the Internet at a Public Location, Such as a Hotel, Coffee Shop, etc.'

- More than 1 in 4 Students from Canada, Spain, the UK and the US have 'hijacked their neighbor's wireless without telling them' in a desperate attempt to access the internet.

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)
Asked my neighbor to use their computer or Internet access	23	26	13	38	31	14	14	19	17	25	28	39	37	4	7
Paid an outrageous fee to access the Internet at a public location, such as a hotel, coffee shop, etc.	20	18	15	16	44	12	6	18	16	14	34	31	27	4	22
Stood outside of a retail store to access free wireless Internet	19	26	22	25	14	14	5	18	25	24	17	19	24	9	27
Hijacked my neighbor's wireless without telling them	19	26	31	17	14	27	13	20	31	23	10	16	16	2	22
Attempted to hack into a secured wireless network	13	12	18	8	10	13	6	13	20	19	15	12	22	2	13
Asked or begged a stranger to use their mobile phone	9	13	6	2	6	5	3	6	20	7	12	12	25	0	5
Asked or begged a stranger for wireless access	7	12	4	9	10	2	2	2	15	7	8	9	17	2	3
None of the above	32	29	36	19	4	41	57	40	13	28	25	19	16	80	43

Q. Under desperate circumstances, what is the most extreme action you have taken to get internet access? (Select all that apply)

# Extreme Behavior for Internet Access

Three in Ten End Users Have Paid an Outrageous Fee to Access the Internet at a Public Location Under Desperate Circumstances.

- More than 1 in 4 End Users in Spain have hijacked their neighbor's wireless without telling them.

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)
Paid an outrageous fee to access the Internet at a public location, such as a hotel, coffee shop, etc.	30	16	23	42	57	28	20	20	35	19	34	44	38	5	39
Stood outside of a retail store to access free wireless Internet	17	22	21	27	15	9	10	13	13	13	14	17	32	6	23
Asked my neighbor to use their computer or Internet access	16	9	7	29	18	9	9	8	12	13	31	35	34	1	7
Hijacked my neighbor's wireless without telling them	15	21	20	15	11	18	11	12	27	21	9	8	18	2	15
Attempted to hack into a secured wireless network	9	9	8	13	8	6	4	2	13	6	9	13	22	2	6
Asked or begged a stranger to use their mobile phone	6	3	3	5	8	1	2	5	7	4	6	7	25	4	4
Asked or begged a stranger for wireless access	5	1	3	9	7	2	0	3	13	8	1	4	15	3	2
None of the above	36	42	45	9	9	51	55	50	10	39	37	19	10	80	42

Q. Under desperate circumstances, what is the most extreme action you have taken to get internet access?

# Lost or Stolen Devices

Almost One in Five College Students Have Lost or Had Their Laptop, Tablet, Smartphone or Other Computing Device Stolen in the Past 12 Months.

- About 1 in 3 Students from Brazil, Spain, India, Mexico and the US has lost or had a computing device stolen in the past 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)
None	81	72	91	72	66	88	87	91	68	84	88	71	77	93	90
Once	13	22	8	19	25	9	10	6	17	7	11	19	20	5	9
Twice	4	2	1	8	9	3	2	2	14	6	1	7	3	2	0
Three or more times	1	4	0	1	1	0	1	1	1	3	0	3	0	0	1
<b>Net: At least once</b>	<b>18</b>	<b>28</b>	<b>9</b>	<b>28</b>	<b>35</b>	<b>12</b>	<b>13</b>	<b>9</b>	<b>32</b>	<b>16</b>	<b>12</b>	<b>29</b>	<b>23</b>	<b>7</b>	<b>10</b>

Q. In the past 12 months, how often have you lost or had your laptop, tablet, Smartphone or other computing device stolen? (Select one)

# Lost or Stolen Devices

15% Say They Have Lost or Had Their Mobile Phone, Laptop or Other Device Stolen in the Past 12 Months.

- Relative to other countries, a significantly larger proportion of End Users in Mexico, India, Brazil and China have lost or had a device stolen in the past year.

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)
None	84	83	94	65	76	91	95	96	79	84	84	69	77	96	91
Once	13	14	6	27	19	6	5	3	15	12	12	27	21	2	9
Twice	2	3	0	7	5	2	0	0	4	4	4	3	1	2	0
Three or more times	0	0	0	1	0	1	0	1	2	0	0	1	1	0	0
<b>Net: At least once</b>	<b>15</b>	<b>17</b>	<b>6</b>	<b>35</b>	<b>24</b>	<b>9</b>	<b>5</b>	<b>4</b>	<b>21</b>	<b>16</b>	<b>16</b>	<b>31</b>	<b>23</b>	<b>4</b>	<b>9</b>

Q. In the past 12 months, how often have you lost or had your mobile phone, laptop, or other computing device stolen? (Select one)

# Personal Experience with Identity Theft

One in Four College Students Have Experienced Identity Theft of Their Personal Information by Age 23.

- Roughly half of Students from China and 1 in 3 Students from Spain, Russia and India have had their identity stolen at least once in their lives.

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)
Never	77	73	85	74	78	86	88	89	65	75	66	67	53	91	88
Once in my life	16	16	12	15	14	14	9	9	22	16	29	24	27	6	9
Twice in my life	5	8	2	8	5	0	2	2	12	6	3	4	9	2	2
Three or more times in my life	3	3	1	4	3	0	1	0	1	3	2	4	11	1	2
<b>Net: At least once in my life</b>	<b>24</b>	<b>27</b>	<b>15</b>	<b>27</b>	<b>22</b>	<b>14</b>	<b>12</b>	<b>11</b>	<b>35</b>	<b>25</b>	<b>34</b>	<b>32</b>	<b>47</b>	<b>9</b>	<b>13</b>

Q. Have you ever experienced identity theft of your personal information...

# Personal Experience with Identity Theft

More than 1 in 5 End Users Have Experienced Identity Theft of Their Personal Information at Some Point.

- Relative to other countries, a significantly larger proportion of End Users in China and the US have experienced identity theft.

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)
Never	78	70	76	78	78	77	88	95	80	80	72	78	41	94	81
Once in my life	16	25	19	19	19	17	11	3	13	10	22	19	27	4	15
Twice in my life	4	4	5	2	2	4	1	2	5	5	4	3	13	1	3
Three or more times in my life	3	1	0	1	1	2	0	0	2	5	2	0	19	1	1
<b>Net: At least once in my life</b>	<b>23</b>	<b>30</b>	<b>24</b>	<b>22</b>	<b>22</b>	<b>23</b>	<b>12</b>	<b>5</b>	<b>20</b>	<b>20</b>	<b>28</b>	<b>22</b>	<b>59</b>	<b>6</b>	<b>19</b>

Q. Have you ever experienced identity theft of your personal information?

# Awareness of Identity Theft Experiences

Two of Five Students Know Friends and/or Family Who Have Experienced Identity Theft.

- A significantly larger proportion (67%) of Students from China know of friends and / or family who have experienced identity theft.

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	40	46	32	52	50	40	24	21	33	46	49	51	67	16	26
No	60	54	68	48	50	60	76	79	67	54	51	49	33	84	74

Q. Do you know of any friends and/or family who have experienced identity theft?



# Password Management

More than 1 in 4 College Students Indicate Never Changing Their Passwords.

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)
I change my password(s) regularly	29	23	17	56	58	15	12	21	57	38	12	53	24	6	10
I change my password(s) occasionally	43	54	55	34	23	40	32	49	26	45	59	35	52	48	58
I never change my password(s)	28	23	28	10	19	45	56	30	17	17	28	12	25	47	33

Q. How careful are you in managing your computer and online passwords? (Select one)

# Password Management

Only About One-Third of End Users from the Total Sample Indicate that They Change Their Computer/Online Passwords on a Regular Basis.

- Roughly 1 in 3 End Users in France, Canada and the US indicate they never change their passwords.

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)
I change my password(s) regularly	35	28	28	57	58	22	27	28	60	37	14	61	30	31	16
I change my password(s) occasionally	46	44	42	41	34	52	38	53	26	49	68	31	55	43	60
I never change my password(s)	19	28	30	2	8	26	35	19	14	14	18	8	15	26	24

Q. How careful are you in managing your computer and online passwords? (Select one)

# Protecting Password Confidentiality

About Half (45%) of College Students Are Somewhat Careless in Protecting the Confidentiality of Their Passwords.

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)
I keep my password on my device itself	18	20	17	23	28	9	8	12	27	9	7	27	17	29	13
I store my password in a document on my computer	17	14	6	25	28	6	4	10	26	18	21	20	25	14	13
I share my passwords with friends and family	11	16	8	7	14	8	11	3	22	7	4	5	28	4	13
I keep my password on a Post-It note on my desk or computer screen	11	13	6	11	22	4	1	7	21	26	10	10	5	7	4
I don't do any of these	55	52	65	42	27	78	76	72	33	43	64	50	42	58	65

Q. How careful are you in protecting the confidentiality of your passwords? (Select all that apply)

# Protecting Password Confidentiality

Nearly 4 in 10 (37%) End Users Are Somewhat Less Careful in Protecting the Confidentiality of Their Passwords Because They Store It on the Device Itself, in a Computer Document, on a Post-It Note Near Their Computer, or Because They Share It with Friends and Family.

- Relative to other countries, significantly larger proportions of End Users in Mexico, Brazil and Spain are less careful in protecting the confidentiality of their passwords.

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)
I keep my password on my device itself	14	19	9	24	17	7	5	4	23	11	8	20	25	13	7
I store my password in a document on my computer	13	8	8	23	24	6	7	7	22	11	14	13	20	11	9
I keep my password on a Post-It note on my desk or computer screen	9	5	5	22	13	1	3	8	26	12	10	6	2	5	4
I share my passwords with friends and family	6	5	4	10	14	11	4	5	7	6	3	2	12	2	5
I don't do any of these	63	66	76	36	38	76	82	78	40	61	70	62	50	71	79

Q. How careful are you in protecting the confidentiality of your passwords? (Select all that apply)

# Detailed Findings

## Securing Privacy



# Using a Wireless Device in a Public Setting

Mainly Influenced by More than Half of College Students from Russia and China, the Majority (31%) of College Students from the Total Sample Have Noticed a Stranger Looking at Their Screen When Using a Wireless Device (e.g. Laptop, Tablet, Smartphone) in a Public Setting.

- About 3 in 10 Students from China and Canada have left their 'belongings and devices unattended' when using them in a public setting.

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)
Noticed a stranger looking at my screen	31	29	31	27	39	25	24	22	19	31	57	32	51	21	19
Accessed an unauthorized wireless connection	27	35	39	14	16	33	25	28	30	24	24	28	30	10	36
Forgotten to monitor my surroundings to make sure no one is looking at my work	24	26	31	16	18	22	23	24	32	21	26	24	31	15	25
Noticed someone listening to my phone calls	19	23	15	22	39	12	17	8	26	10	30	23	21	4	12
Left my belongings and devices unattended (e.g. while getting something to eat or drink, going to the restroom, etc.)	16	22	27	18	17	15	3	14	17	10	7	17	31	14	15
I never use a wireless device in a public setting	14	7	6	14	7	12	24	17	11	12	15	21	5	29	12
None of the above	19	20	19	19	10	32	22	24	12	23	6	8	11	29	29

Q. When using a wireless device (e.g. laptop, tablet, Smartphone) in a public setting, I have...(Select all that apply)

# Using a Wireless Device in a Public Setting

One Quarter of End Users Have Used a Personal Email Account to Send Information to Coworkers, Customers, and Prospects While Working from a Remote Location in a Public Setting.

- Significantly large proportions of End Users in China have left their belongings and devices unattended or accessed an unauthorized wireless connection while working 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)
Used a personal email account to send information to coworkers, customers, and prospects	24	20	14	46	36	16	8	17	21	16	34	33	51	8	16
Noticed a stranger looking at my screen	16	11	3	24	39	4	7	9	20	14	30	25	31	4	8
Noticed someone listening to my work-related calls	15	8	8	22	34	6	4	6	22	16	19	27	23	7	8
Forgotten to monitor my surroundings to make sure no one is looking at my work	13	6	8	20	6	15	5	11	15	15	16	22	28	7	8
Left my belongings and devices unattended (e.g. while getting something to eat or drink, going to the restroom, etc.)	12	15	6	12	2	9	5	11	18	15	14	15	27	9	10
Accessed an unauthorized wireless connection	10	16	10	17	8	13	7	2	12	3	8	11	25	5	9
None of the above	15	22	16	18	10	21	5	14	21	22	6	10	5	14	25
I never work from a remote location in a public setting	34	33	53	7	10	44	75	56	10	26	39	18	14	57	42

Q. Please select the statements that best describe you. When working from a remote location in a public setting, I have...?

# Most Valuable Personal Items on a Trip

Half of College Students Would Rather Lose Their Wallet/Purse (ID, Credit Cards) Instead of Their Computing Device.

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

Half of Employees Would Rather Lose Their Wallet/Purse (ID, Credit Cards) Than Their Computing Device.

- 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)

# Concern About Internet Security Threats

At Least 7 in 10 Students from the Total Sample Believe Their Generation Is Extremely/Moderately Concerned About Internet Security Threats.

- More than 4 in 10 Brazilian and Spanish Students believe their generation is extremely concerned about Internet security threats.
- On the contrary, about 1 in 3 French and Canadian Students believe their generation is not at all concerned or never thinks about Internet security threats.

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)
Net: Extremely/Moderately concerned	73	66	63	82	83	68	53	82	79	65	72	78	79	94	66
Extremely concerned	22	20	20	32	46	14	11	13	42	13	16	35	10	21	18
Moderately concerned	51	46	43	50	37	54	42	69	37	52	56	43	69	73	48
Not at all concerned — They never think about security threats	15	19	30	10	9	17	35	16	11	12	16	11	9	1	23
Not at all concerned — They believe security is their service providers' problem, not theirs	7	8	5	4	5	11	4	1	10	13	8	8	13	3	6
Not at all concerned — They believe security is the IT department's problem, not theirs	4	7	3	4	4	4	8	1	1	10	4	3	0	2	5

Q. How concerned do you think your generation is about internet security threats? (Select one)

# Concern over External Security Threats

One of Four Are Not Concerned About Security Threats When Accessing Corporate Information from Outside Their Office.

- More than 1 in 4 End Users in Russia and Australia are not at all concerned because security is the IT department's problem.

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)
Extremely concerned	18	11	6	40	32	8	13	12	37	12	7	46	6	18	4
Moderately concerned — I think twice before accessing sensitive information from outside my office	40	41	36	45	62	42	28	37	40	44	29	41	54	34	29
Not at all concerned — I never think about security threats	12	21	20	9	1	11	10	8	4	13	10	7	25	7	23
Not at all concerned — security is the IT department's problem, not mine	14	14	19	5	3	21	15	17	15	17	28	3	9	8	27
I'm not able to access corporate information from outside my office	16	13	19	1	2	19	34	26	4	14	26	4	6	33	17

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

# Attitudes Toward Privacy

One in Three Students Are Not Guarded With the Type of Information They Share Online.

- A quarter of Students from China indicate that they 'don't mind sharing their personal information online,' while nearly 1 in 5 (15%) Students from Japan don't really think about privacy.

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)
I am guarded with the type of information I share online	68	61	69	72	81	68	85	60	78	65	57	59	59	69	63
I don't mind sharing my personal information online	15	21	16	16	7	16	4	12	10	11	16	19	25	10	19
The boundaries around privacy are loosening - it's a fact of life that I just accept	10	9	9	8	10	13	9	17	5	10	14	9	13	6	11
I don't really think about privacy	8	9	6	5	2	3	2	11	8	14	13	12	3	15	7

Q. How much of an issue is privacy to you? (Select all that apply)

# 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)