Research Paper

Mobile Computing Trends: Insight into Today’s Workforce

Today’s workforce is in a state of constant change. Users can now work anytime, from any location, and do so with data that’s accessible from the company network, the Web, or the cloud. Users are working when they can and how they want to, on mobile devices that make it all possible. The catch is that more and more of these devices are personally owned.

While this new mobile workforce is increasing productivity across the business, it also presents complex challenges for IT security. It means that there are multitudes of potentially unsecured, unmanaged devices running on multiple platforms, and these devices may be compromising the integrity of the corporate network and sensitive business data.

In the regions surveyed, a large percentage of respondents were technology users (83 percent in the United States, and 92 percent in Germany). These users rely regularly on desktops, notebooks, tablets, or smart phones for work use.

Summary of Key Findings

Since 2006, IMR has been studying knowledge-worker behaviors using four overlapping themes:

- **Collaboration** – The nature of where, when, and with whom people are working, whether remotely, face-to-face, or individually
- **Information management** – The management and manipulation of data
- **Security** – The use of information that requires privacy or security, such as data and passwords
- **Location independence** – Describes where one works, whether at the office, at home, or “anytime, anywhere”

Intel Research Goes Straight to the Source

Intel wanted to take a closer look at these workforce behaviors to gain insight on current global mobility trends. To that end, Intel Market Research (IMR) surveyed over 1,700 knowledge workers1 in the United States and Germany in an effort to:

- Track the behavior of workers across four primary themes: collaboration, information management, security, and location independence.
- Identify changing trends, such as consumerization, that are driving workforce behaviors.
- Determine what factors are motivating user behaviors.

1. In the regions surveyed, a large percentage of respondents were technology users (83 percent in the United States, and 92 percent in Germany). These users rely regularly on desktops, notebooks, tablets, or smart phones for work use.
The results of this 2012 study, based on these four themes, are represented in comparison to the findings of a similar study done in 2006. The only difference between the two studies is that the more recent study allowed the inclusion of users in IT job roles. Key findings of the 2012 study include:

1. **Users value location independence most.**

Across both countries, the ability to work anytime, from any location, is deemed most important. Interestingly, it’s not the common everyday tasks that users deemed most important; it’s simply having the ability to access the information they need from a variety of locations to get things done at any time.

2. **Most users rely on personally owned devices daily for work.**

In both countries, users are relying on an average of 2.1 devices for work, every day. And these personally owned devices are frequently not part of a managed Bring Your Own Device (BYOD) program. Of these devices in the United States:

- 57 percent are using notebooks (39 percent of these are personally owned).
- 47 percent are using smart phones (77 percent of these are personally owned).
- 18 percent are using tablets (61 percent of these are personally owned).

3. **The need for anywhere, anytime data access is on the rise.**

Users continue to have high expectations around connectivity and data access. Across both countries, survey results showed an increasing demand for information access overall. There was also a substantial increase in the need to access data outside the office and while traveling.

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**Mobile Devices, Not Business Models, Driving Change**

Surprisingly, there was no significant increase in telecommuting. Although the telecommuting model may be more common in today’s business environment, it’s not the primary force driving the need for mobility. Workers want the flexibility to access information on the go, using the innovative mobile technologies they use at home. It’s these mobile devices that are driving changes in user behavior.

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### Location Independence

**General travel**

- Access your organization’s network when away from the office
- Work at client, customer, vendor, or other sites away from your primary office
- Drive to various sites as part of your job
- Work while traveling on airplanes or trains

<table>
<thead>
<tr>
<th>% doing activities weekly</th>
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<tbody>
<tr>
<td>US</td>
</tr>
<tr>
<td>39%</td>
</tr>
<tr>
<td>23%</td>
</tr>
<tr>
<td>26%</td>
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<td>5%</td>
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**Overnight travel frequency**

- Once a month or more
- Less than once a month
- Never

<table>
<thead>
<tr>
<th>% overnight travel</th>
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<tbody>
<tr>
<td>US</td>
</tr>
<tr>
<td>10%</td>
</tr>
<tr>
<td>35%</td>
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<tr>
<td>55%</td>
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**Work-at-home practice**

- Work from home one or more days a week
- Work from the office full time, but also work from home on an ad hoc basis
- Do not work from home at all

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<thead>
<tr>
<th>% work-at-home practice</th>
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<tbody>
<tr>
<td>US</td>
</tr>
<tr>
<td>15%</td>
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<tr>
<td>30%</td>
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<tr>
<td>55%</td>
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A Closer Look at Mobile Data Use

The research study also took a deeper look at the types of information management tasks that are performed when users have remote access.

Not surprisingly, searching for information and saving work to a network drive emerged as the top two tasks performed, followed by data management tasks.

Information Access and Management

<table>
<thead>
<tr>
<th>Activity</th>
<th>% doing activities weekly</th>
</tr>
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<tbody>
<tr>
<td>Search computer for information</td>
<td>87%</td>
</tr>
<tr>
<td>Save your work on your PC or the organization's network/shared drive</td>
<td>80%</td>
</tr>
<tr>
<td>Transfer data between applications</td>
<td>56%</td>
</tr>
<tr>
<td>Extract data from databases for analysis</td>
<td>51%</td>
</tr>
<tr>
<td>Perform what-if analysis</td>
<td>26%</td>
</tr>
</tbody>
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An Opportunity to Increase Productivity for All Users

Although the majority of respondents in this survey were technology workers, there were some who identified as nonusers—those who don’t rely on technology to do their jobs. Interestingly, even these nonusers are showing an emerging need for mobile technology to automate specific tasks and increase productivity.
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When compared to the findings of the 2006 research study, these results show a significant increase in the importance of being able to work from any location. Users across borders want the ability to work flexibly on the go. Yet the fact is that most employers are still providing stationary desktop PCs. And in an effort to fill this gap, users are increasingly relying on their own mobile devices—thus adding to the number of unmanaged devices accessing the corporate network.

You can address these challenges by making sure users have the right mobile device for the job. Learn more by exploring these Intel resources:

• Find out more about mobility in the enterprise at intel.com/mobileproductivity.

• Check out additional Intel research on BYOD in the enterprise.

• Get the latest business-class mobile devices:
  - Ultrabook™ devices in the enterprise: intel.com/ultrabookforbusiness
  - Tablets based on Intel® architecture: intel.com/tabletforbusiness

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Survey respondents were 18 years or older and employed full time in qualifying industries and occupations. The research method included a phone survey to measure overall segment sizing and a detailed web survey to develop in-depth profiles of user segments.