



# Ipsos Mori 4<sup>th</sup> Annual SMB Survey

## Switzerland Results

June 2015

# Ipsos Mori Methodology

Ipsos MORI interviewed **5,555** employees of SMBs (Small to Medium-sized Businesses) in the following countries: **Great Britain, Poland, Spain, the Netherlands, the Czech Republic, Denmark, Italy, Belgium, Sweden, Switzerland, Hungary, Romania, Ukraine, Greece, Norway and Finland.**



All participants fulfilled three key criteria: they worked for companies which were headquartered in these countries, they used some form of mobile computing and/or a computer at their place of work and they worked for companies that employ 250 people or fewer.

Interviews were conducted online via the Ipsos Interactive panel between 9th January and 9th February 2015. Data are unweighted.



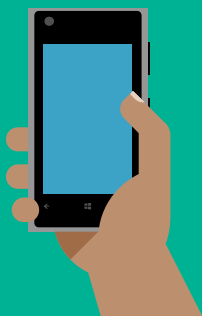
# Snapshot of SMB Workers





84%

say they are **contactable**  
by work outside  
working hours



9%


Work 51+ hrs per  
week



4%

spend over 60 minutes  
**commuting** to and from  
work each day





SMB Workers  
receive an average of

**16** work  
emails per day

& an average of

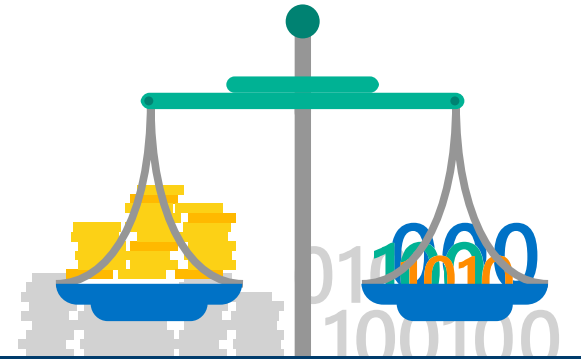
**16** personal  
emails per day



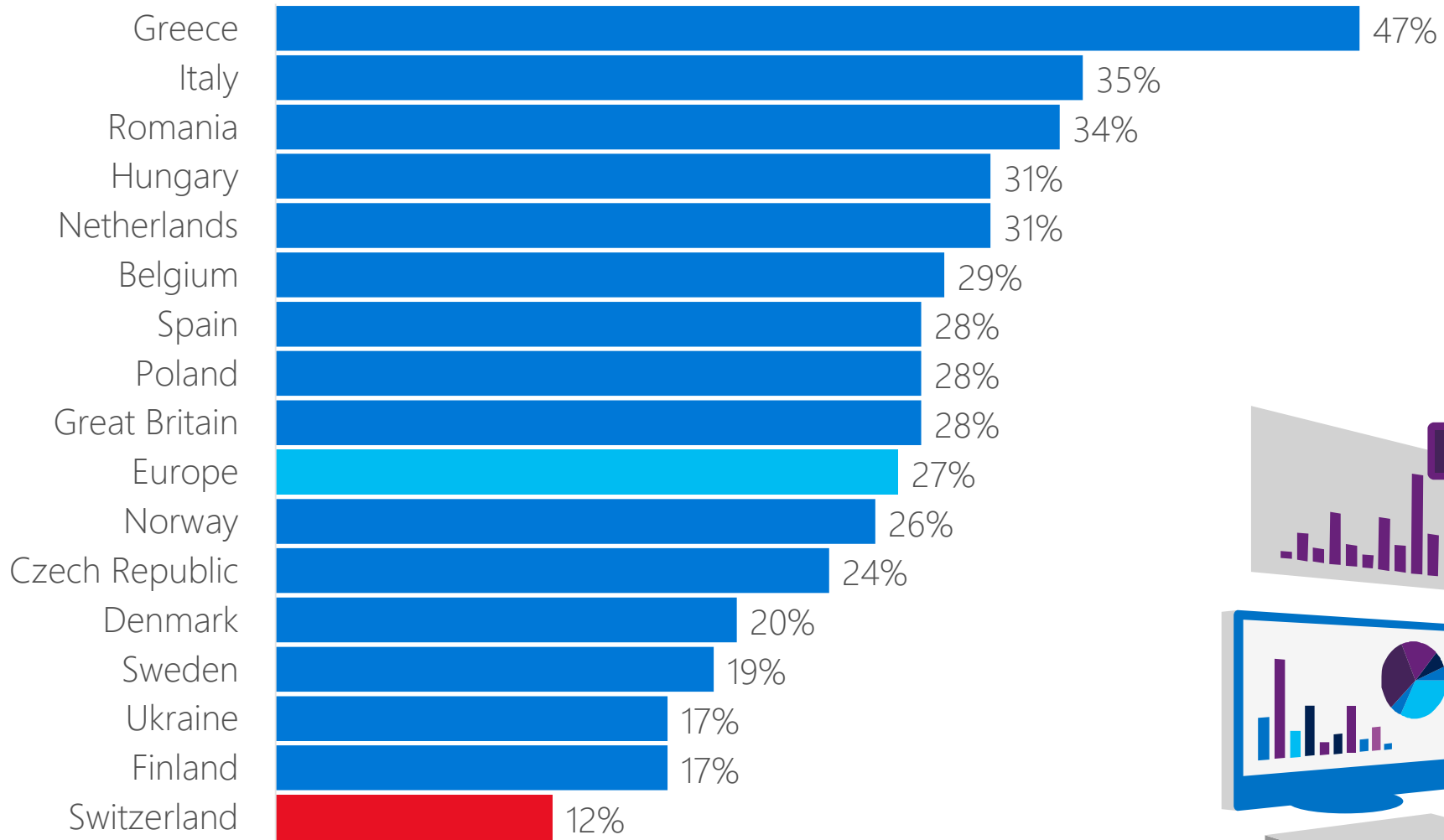
# Information overload



12%  
agree always  
overloaded with emails  
and information



62%  
disagree that this is the  
case



Mobility





# The Mobile Revolution

**25%** of SMBs that use mobile services more intensively see their revenues growing up to 2x faster and add jobs up to 8x faster than their peers

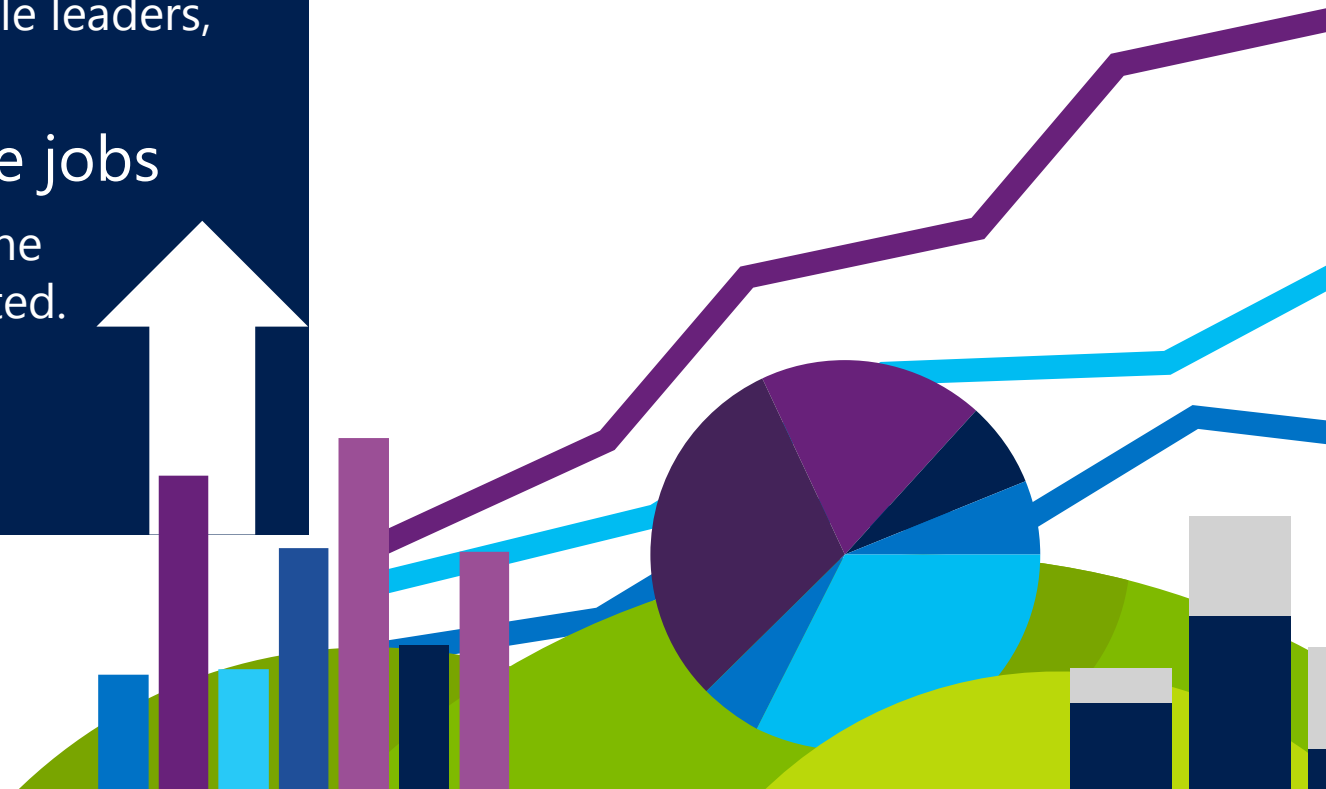
Greater mobile adoption by SMEs can create jobs. If more SMEs expand their businesses at the rate of the mobile leaders,

**7 million more jobs**

could be added in the six countries evaluated.

**BCG** Boston Consulting Group  
How Mobile Technologies Drive a Trillion Dollar Impact

<https://www.bcgperspectives.com/content/articles/telecommunications technology business transformation mobile revolution/>



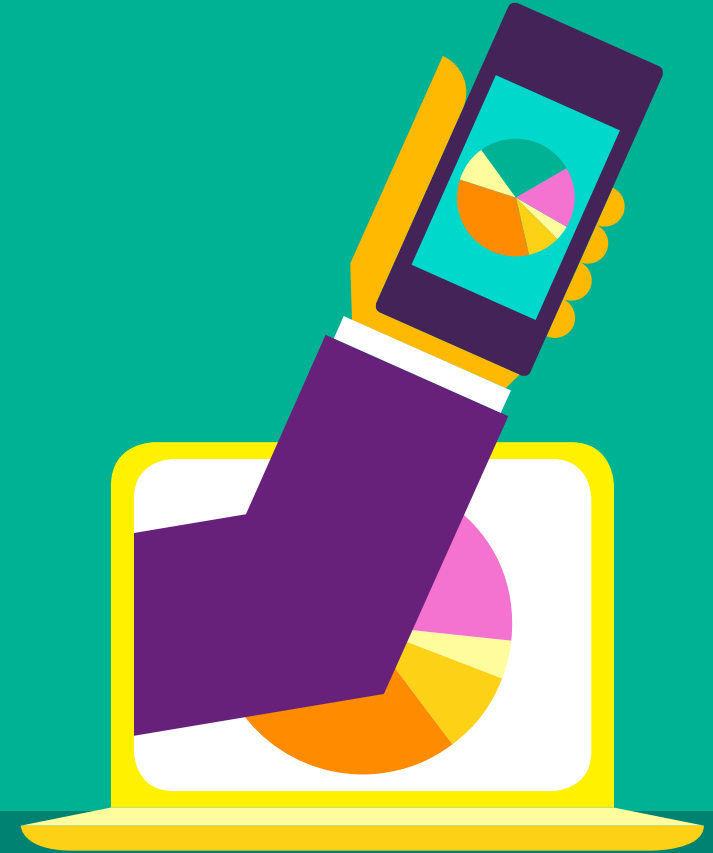
# Mobility not yet the new normal

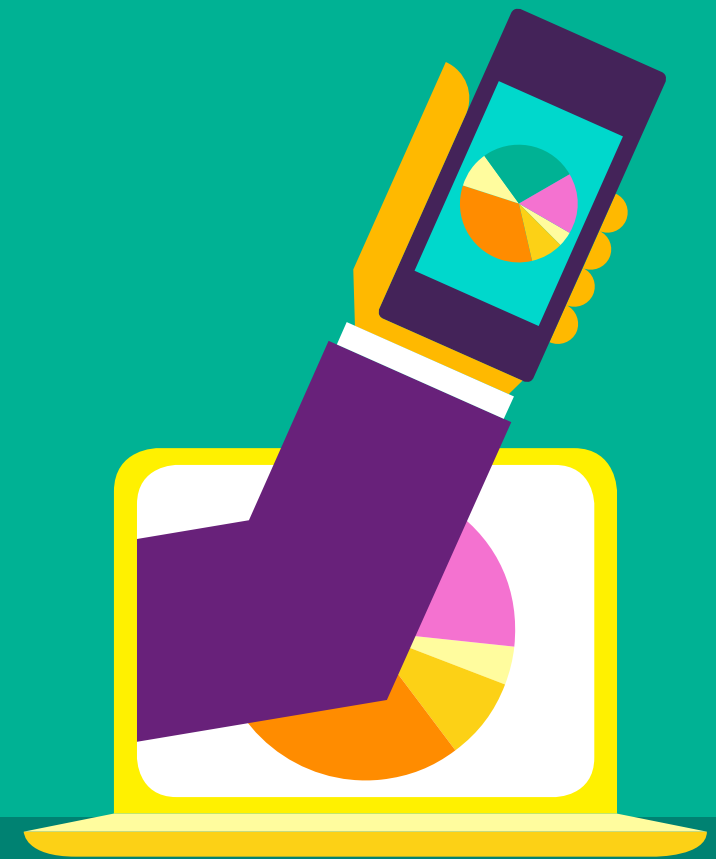
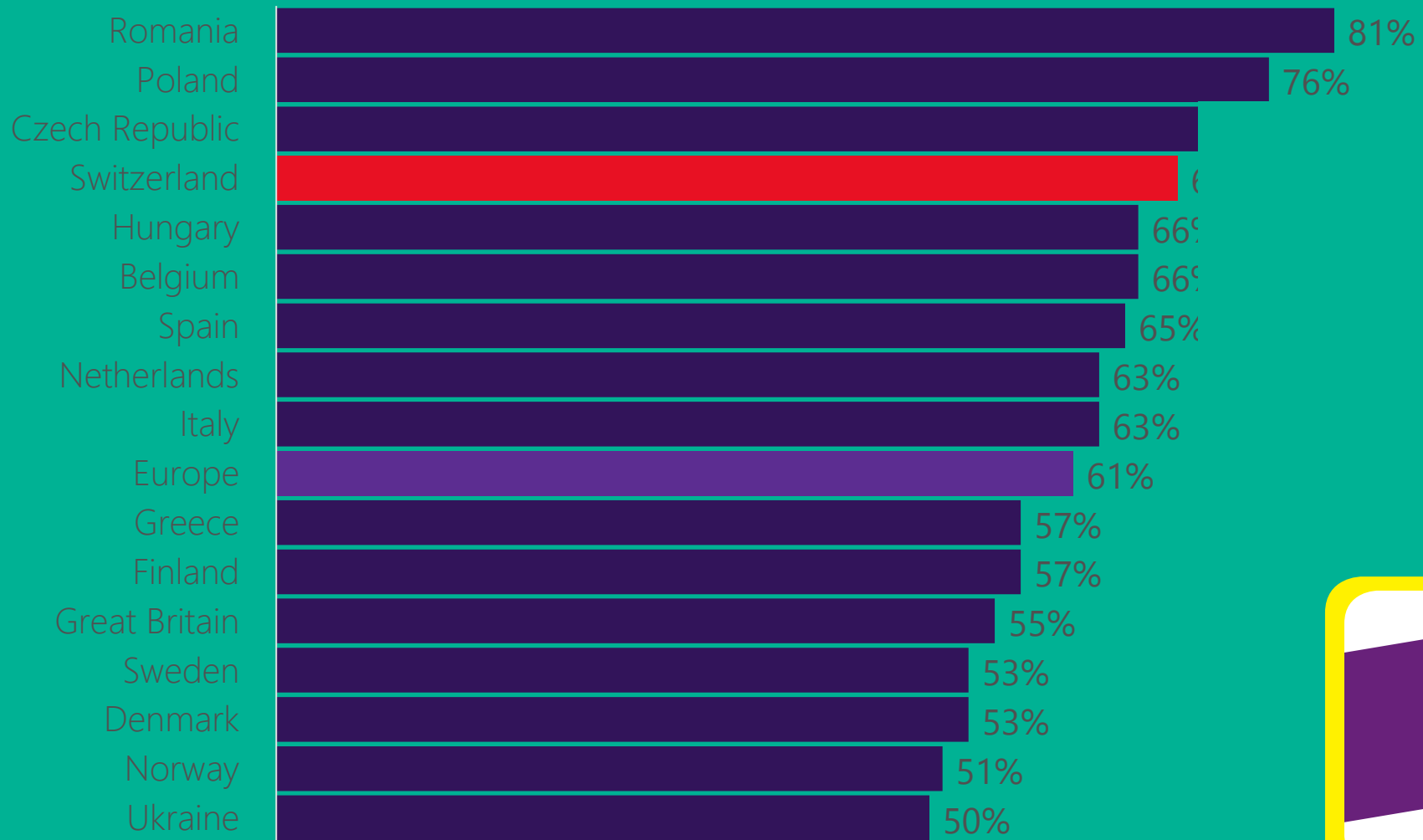
31%

say they don't need to be present to get their work done

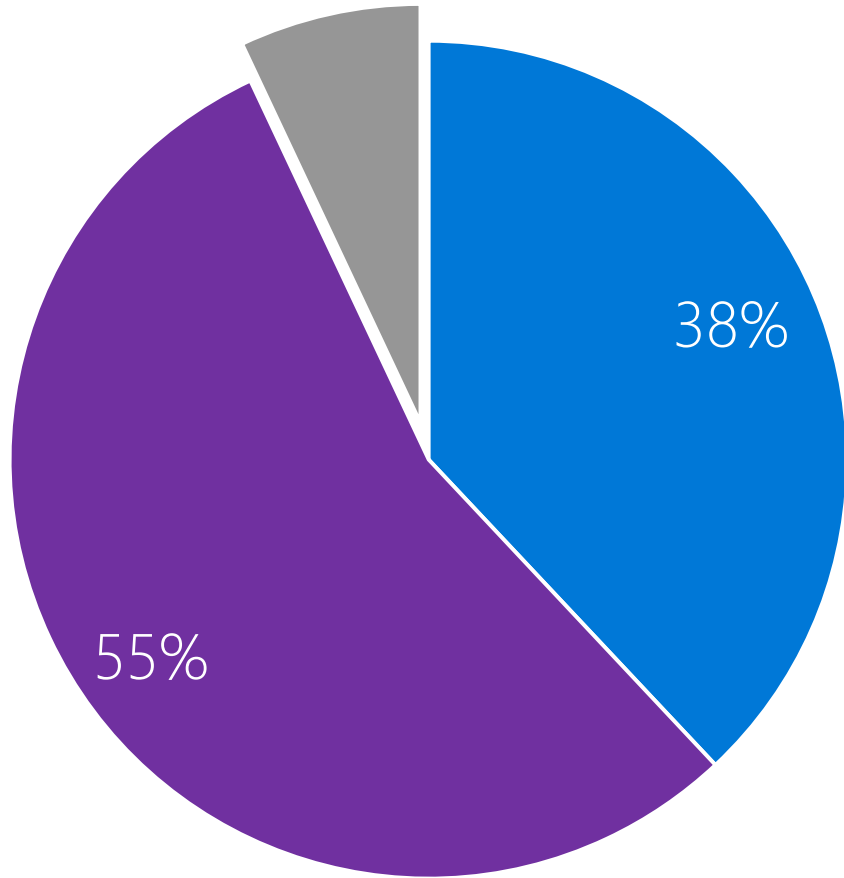
69%

say yes they need to be present to get their jobs done





# Why presence is necessary...



It is not possible to work remotely

My work is attendance based



# Why it's not necessary...

46%

I can choose where I get my work done

42%

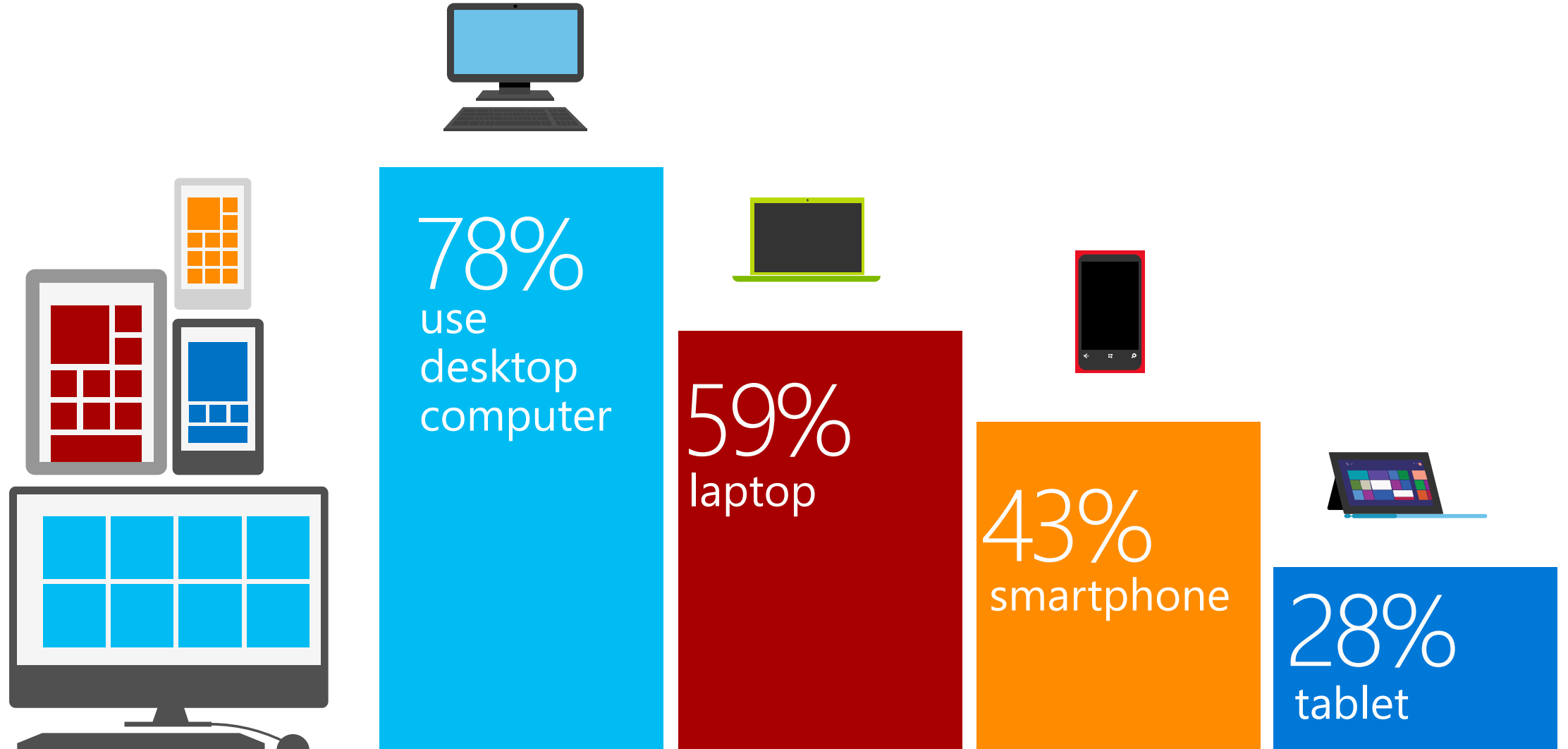
I can choose when I get my work done

40%

I regularly do additional work outside of normal work hours



# The devices they use for work





Desktop Computer



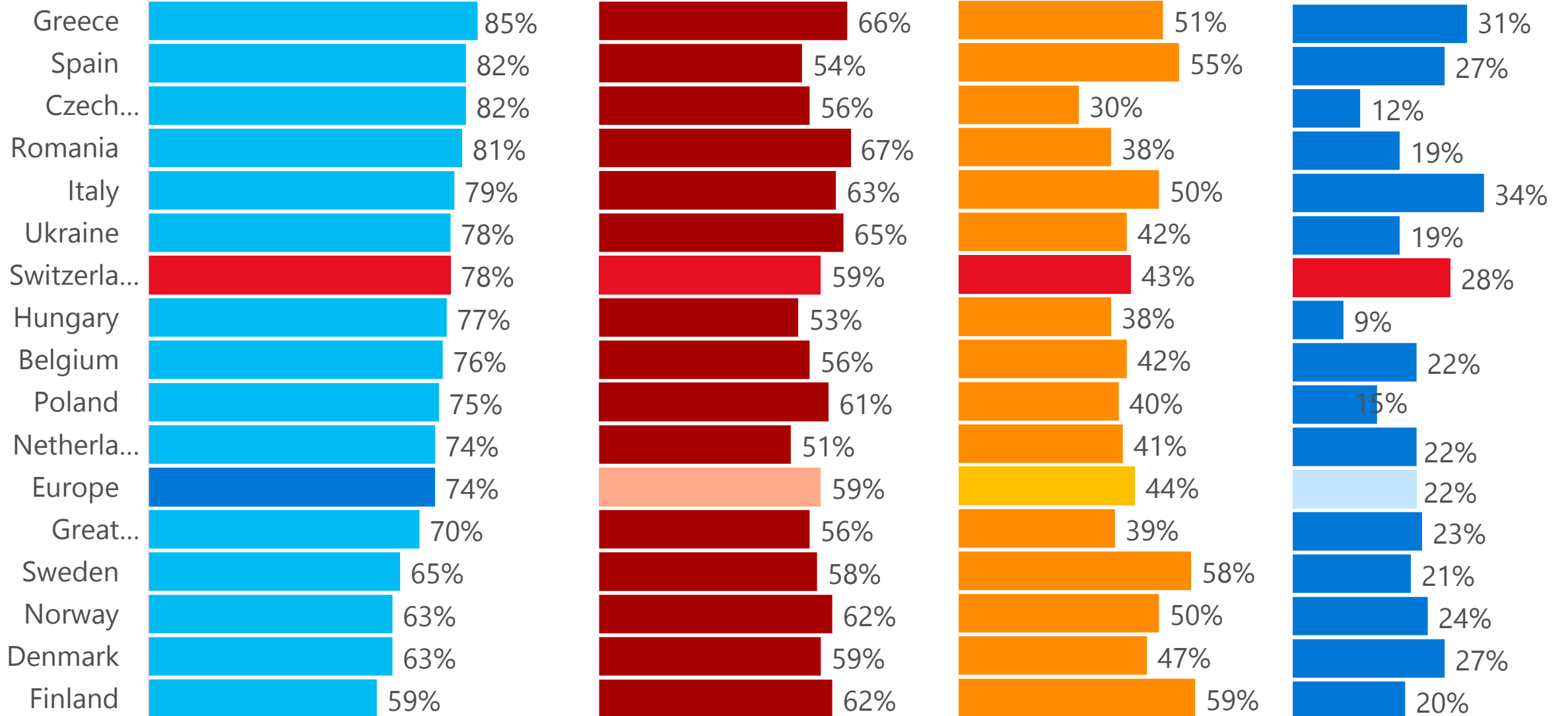
Laptop

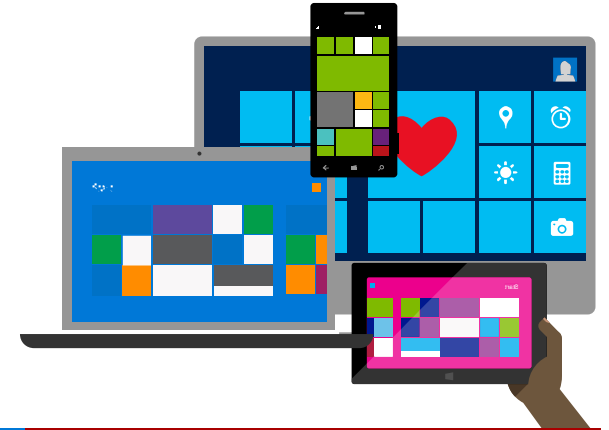
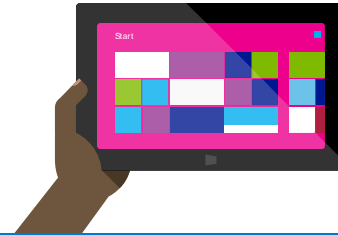
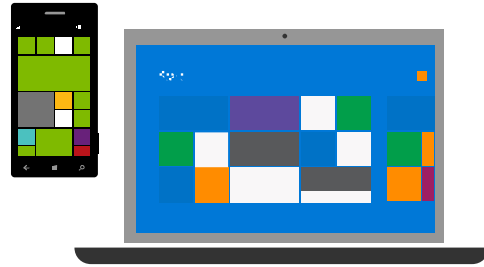
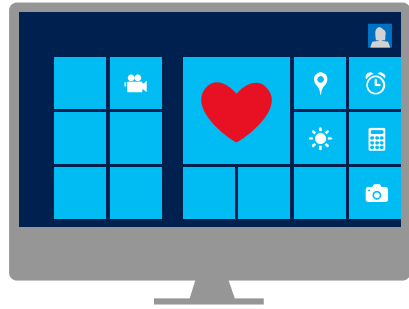


Smartphone



iPad / Tablet





29%

use a desktop PC  
only

9%

use a  
smartphone &  
laptop only

12%

Use desktop,  
laptop, &  
smartphone

10%

Use all 4 devices  
– desktop,  
laptop, tablet &  
smartphone

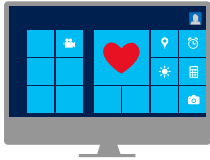


# Who owns the devices...

Employer Owned

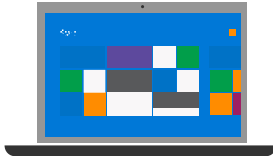
Personal

53%



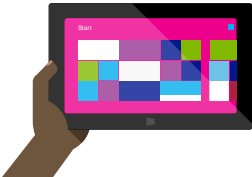
23%

32%



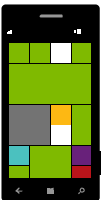
30%

9%

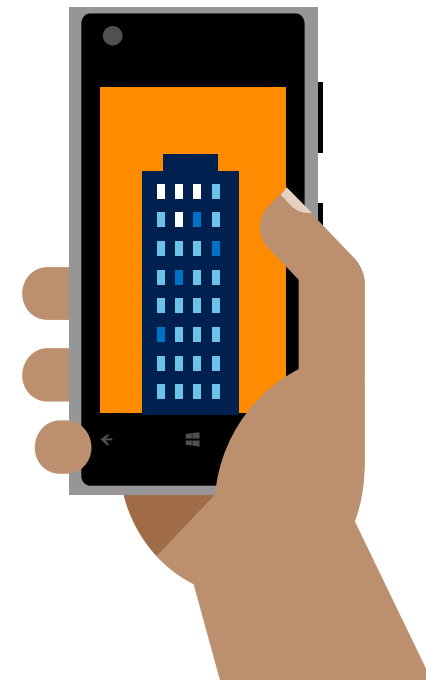
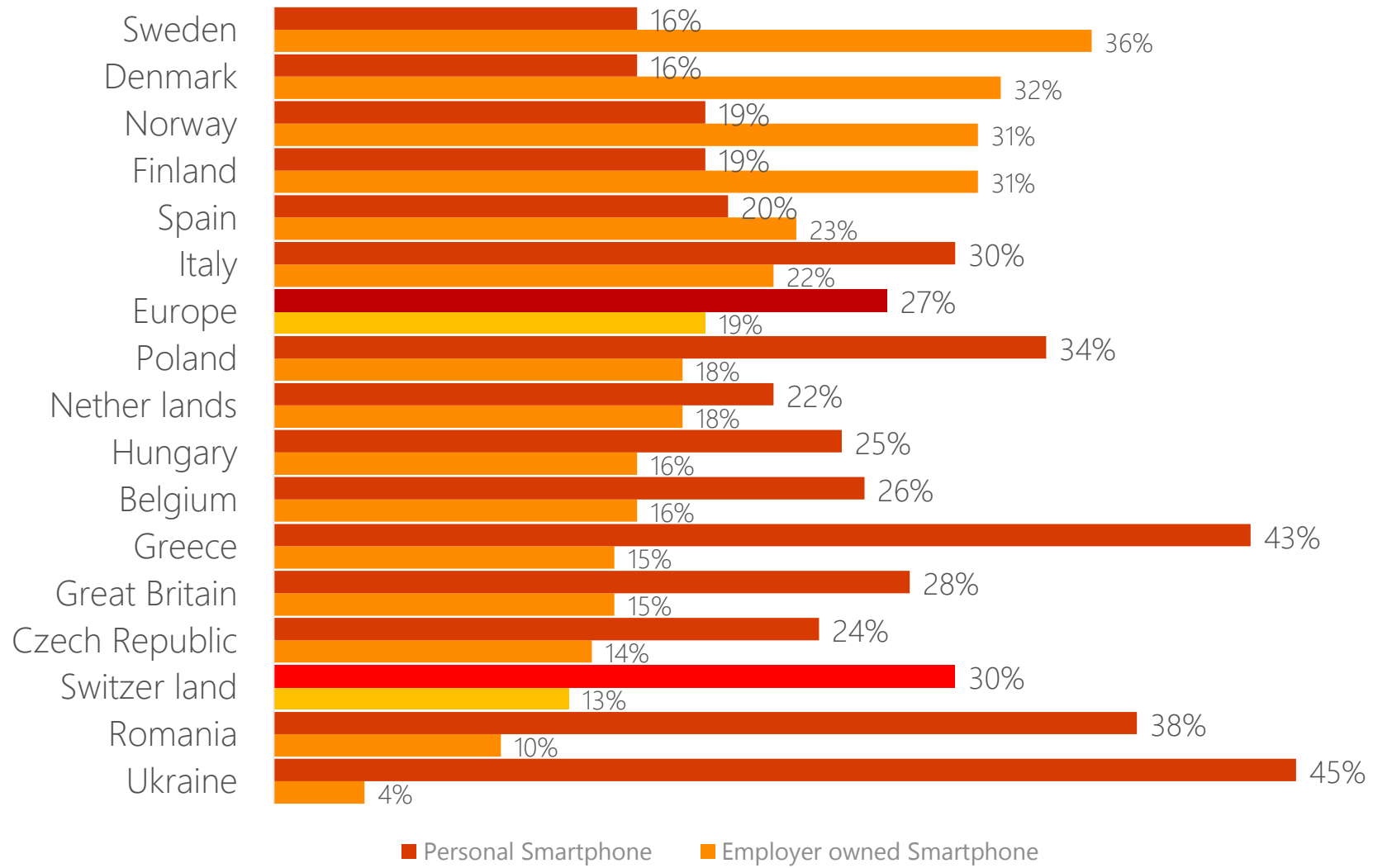


13%

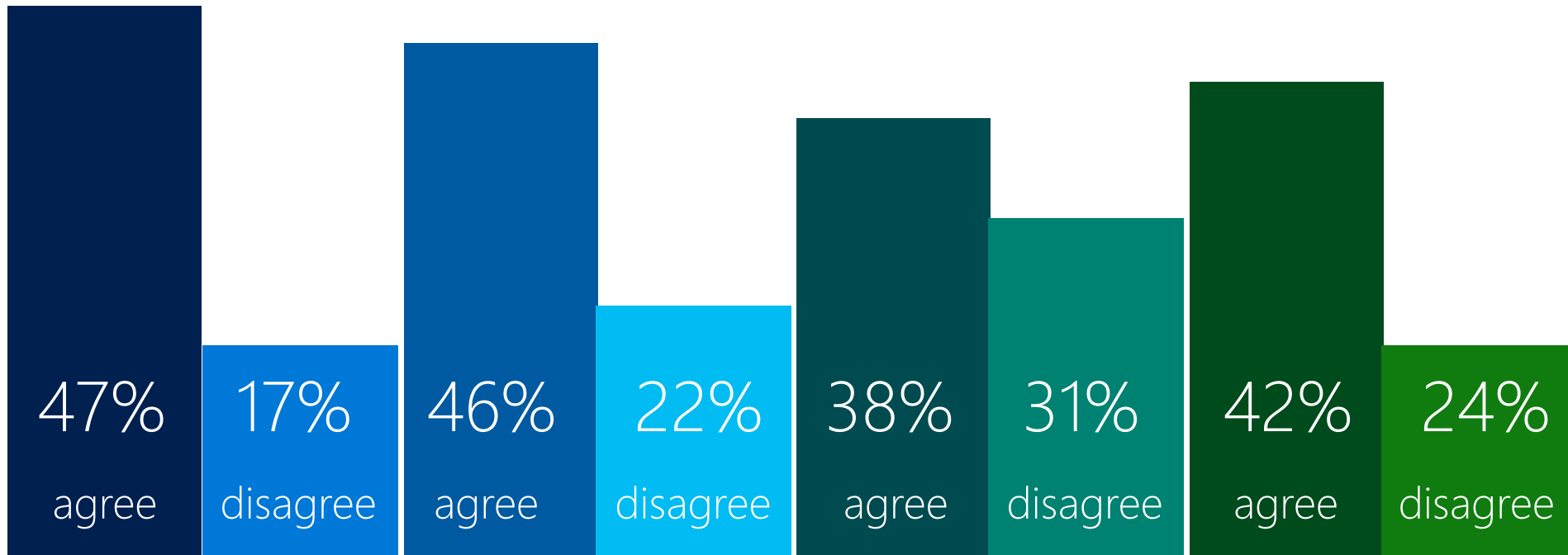
14%



25%



# Impact of mobile technology

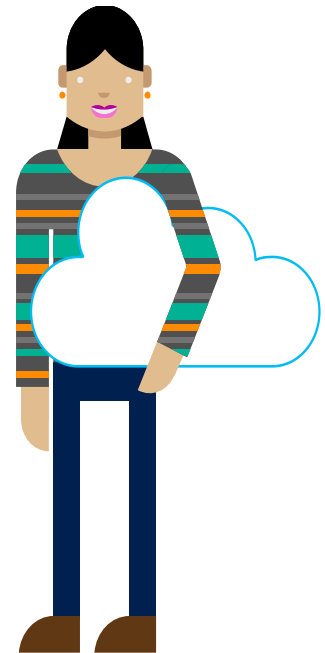


Helps me save time & boosts productivity so that I can better balance work & family or personal life

Makes me more productive when out of the office

Takes quality time away from my personal life as it makes it harder to escape work

Makes work more demanding as there's an overload of too much information and email





Getting things done at work

# Communicating

68%

say email is most important to get the job done



59%

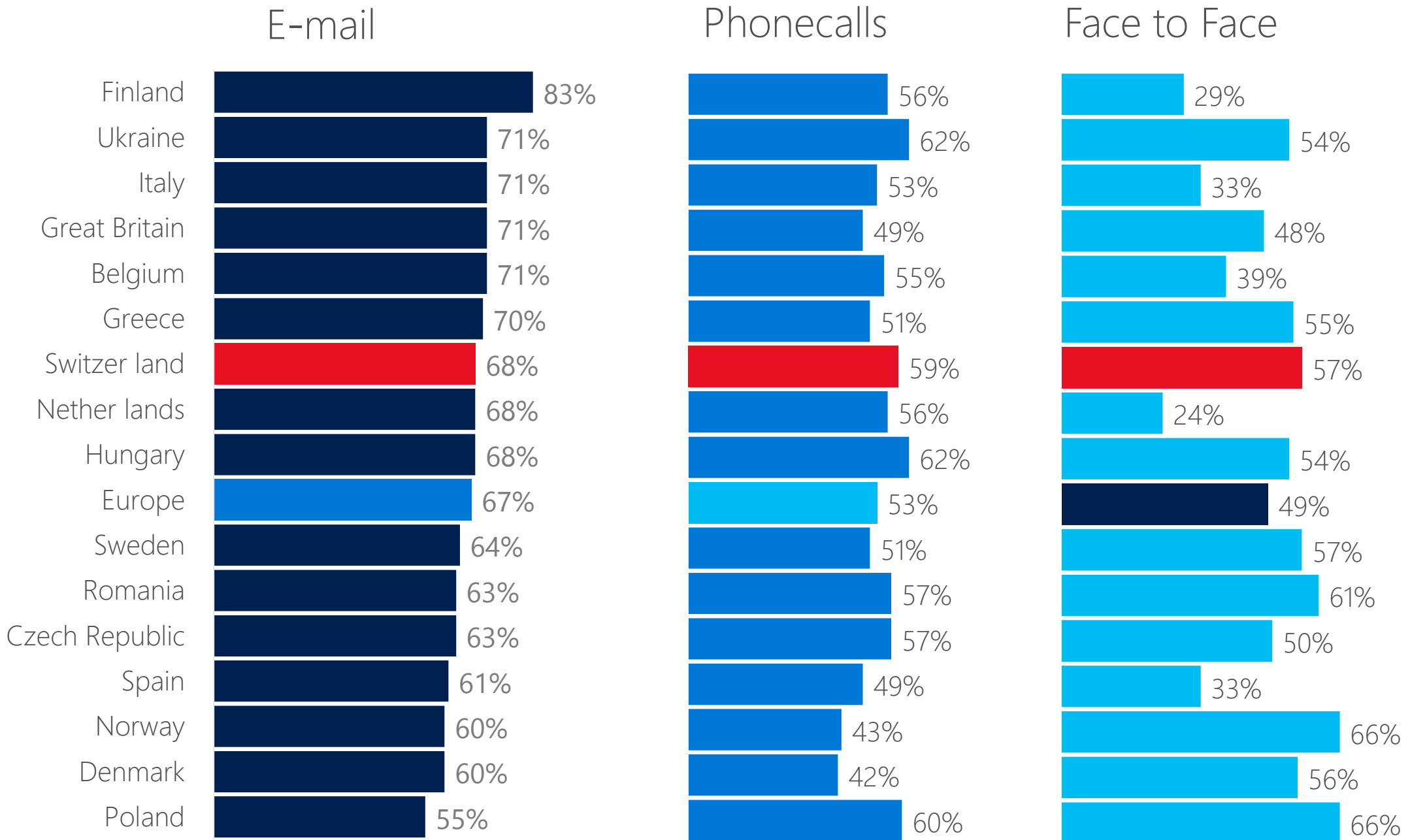
say  
phonecalls



57%

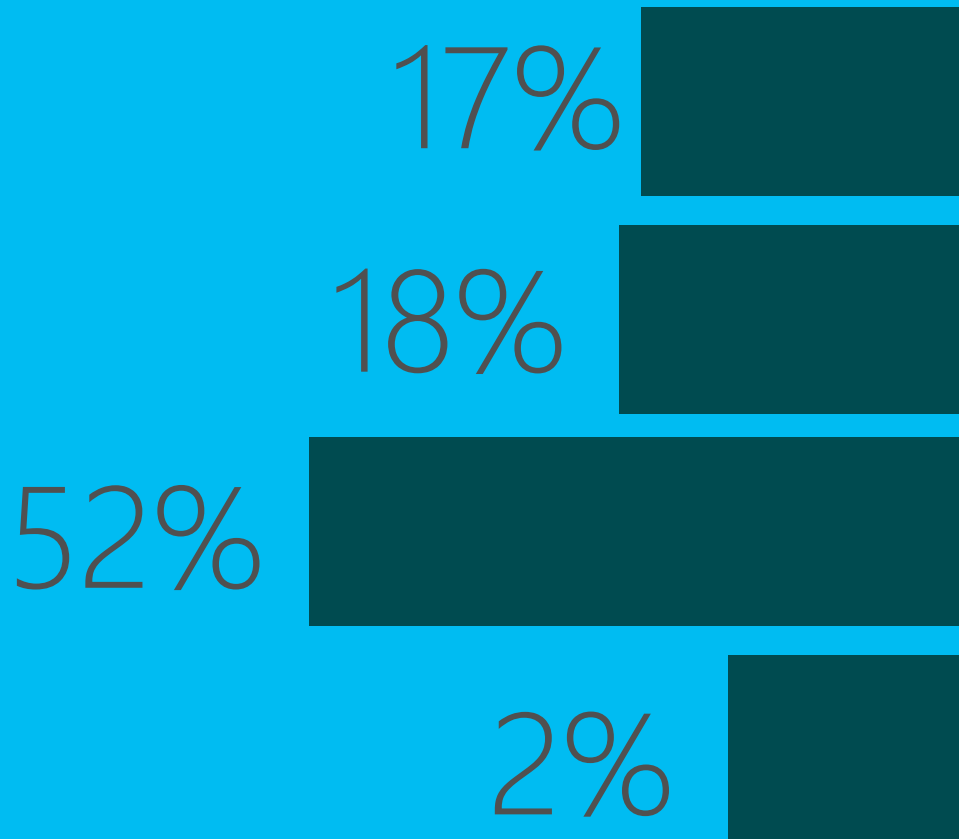
Face to face  
meetings



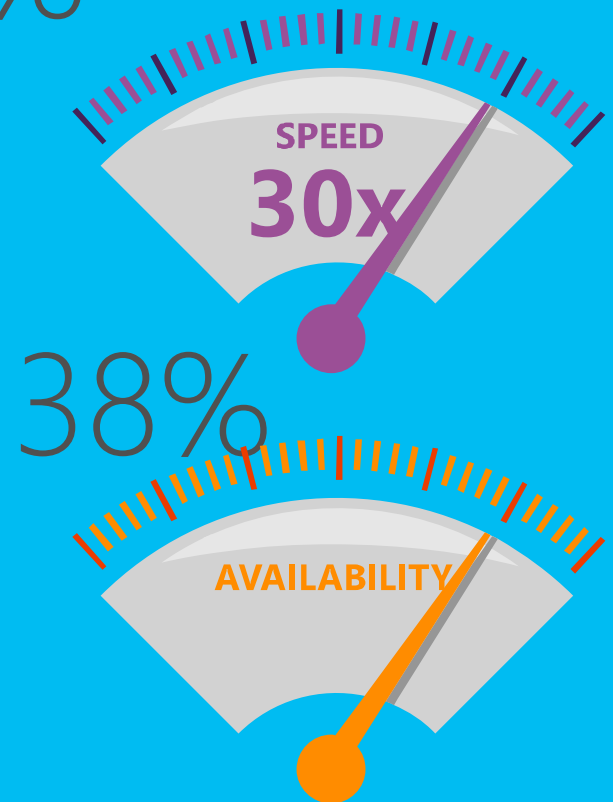
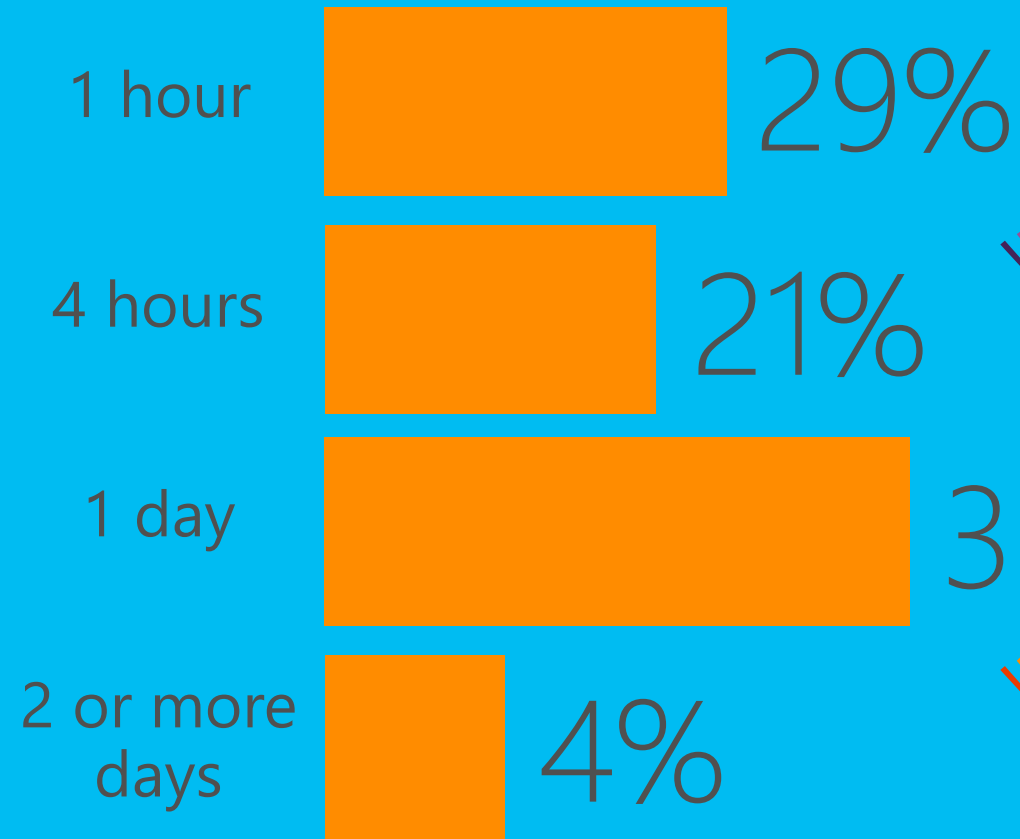


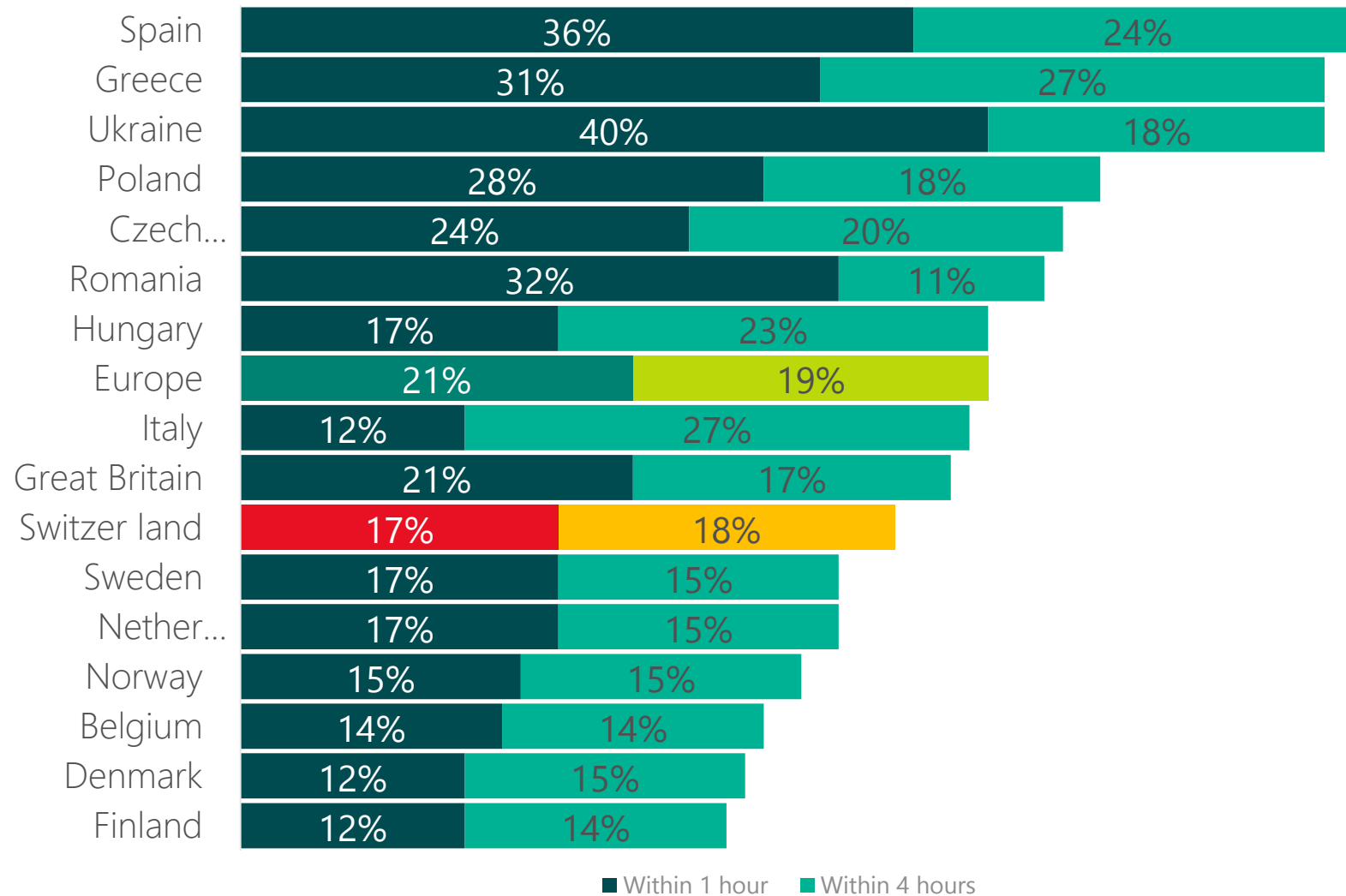
# Responsiveness

## Customers or Clients



## Colleagues







# A 'productive' day at work means...

76% ticking off everything on 'to-do' list

81% feel like they have an impact

50% zero email in inbox

75% helping out co-workers

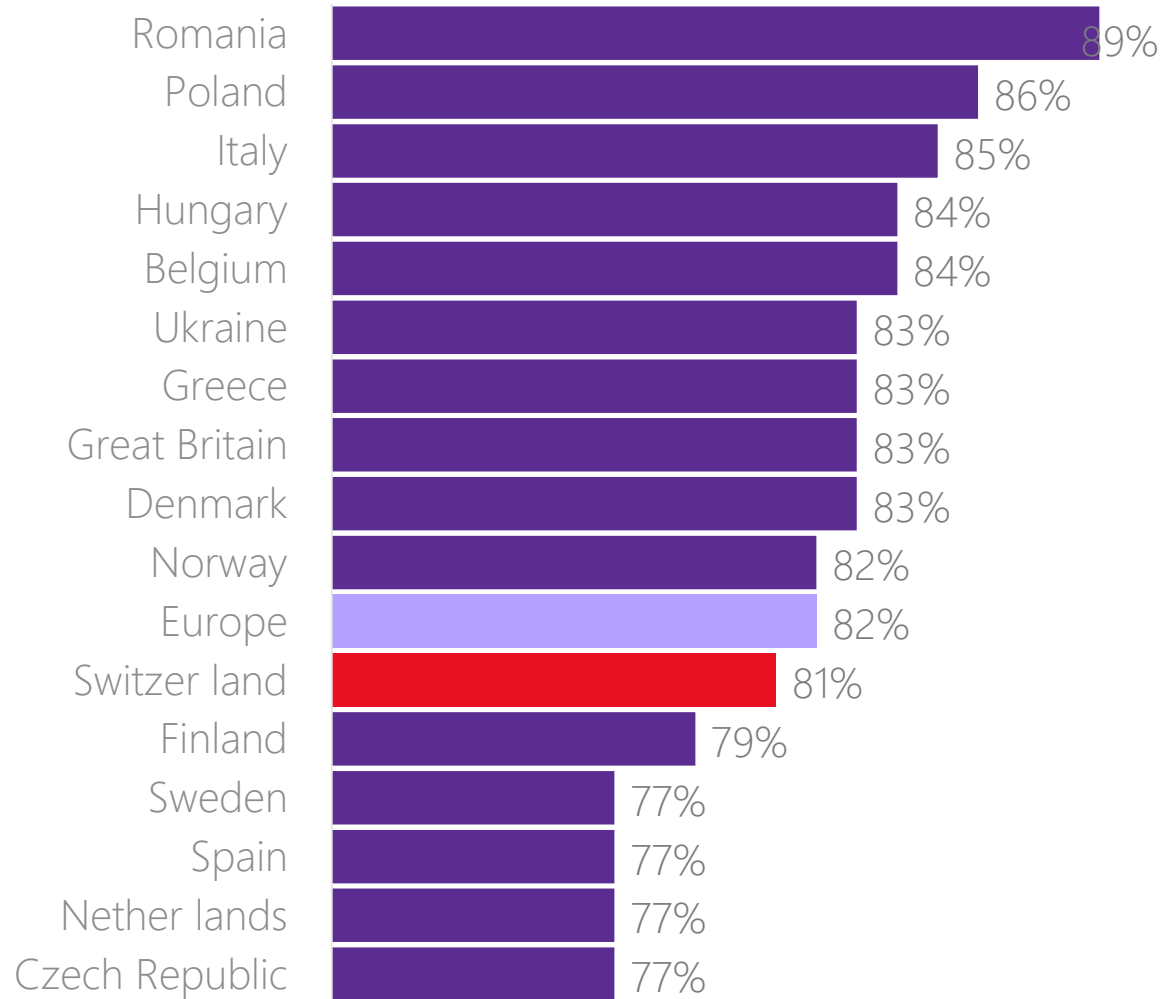
49% attending all meetings

64% generate new business

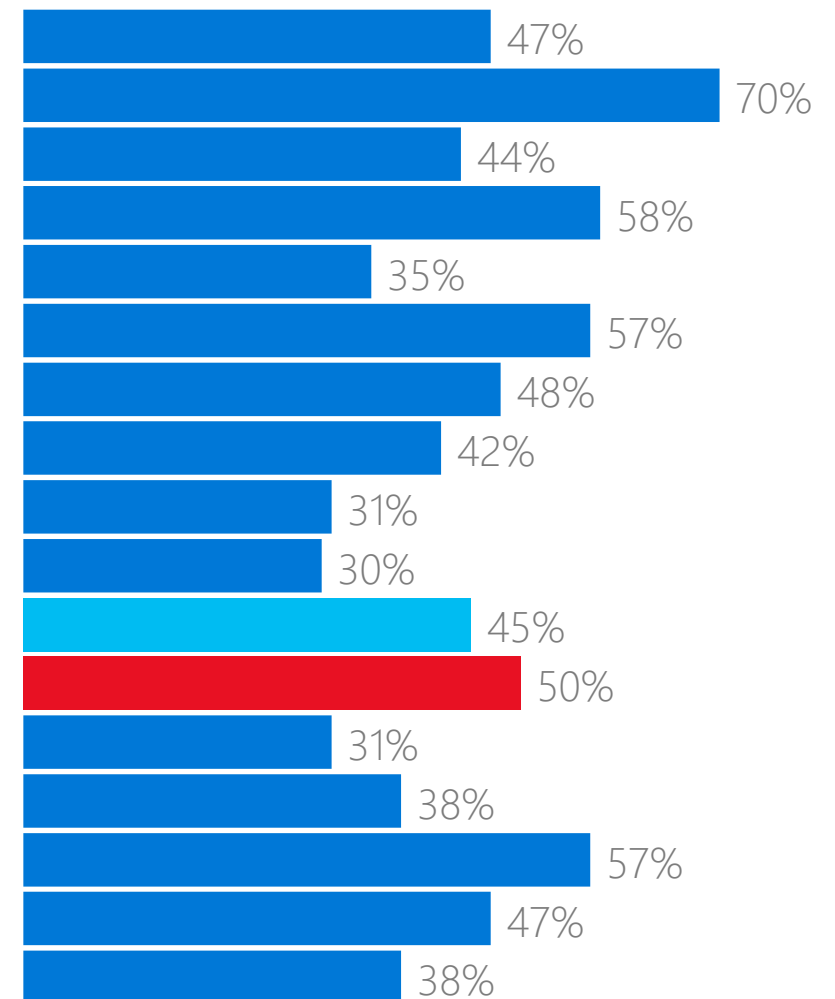
40% leaving work on time



## Having an impact



## Zero email in inbox



# What would help...

Fewer administrative tasks

30%

More effective meetings

24%

Fewer distractions

23%

More flexible work culture

13%

Smarter Software tools and applications

11%



# Keeping up with it all



28%

eat lunch  
away from  
their desk



35%

drink coffee



37%

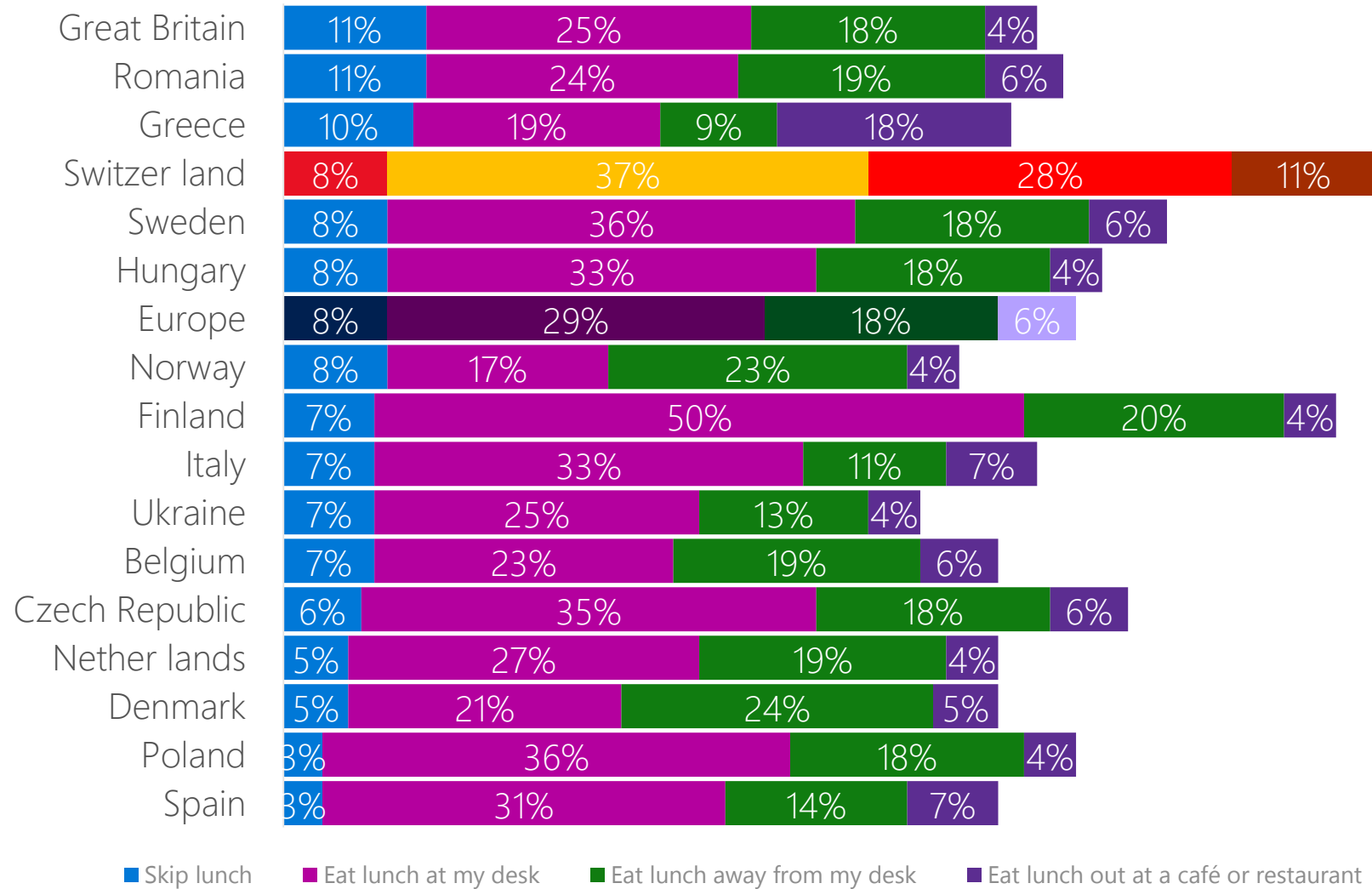
take regular  
breaks



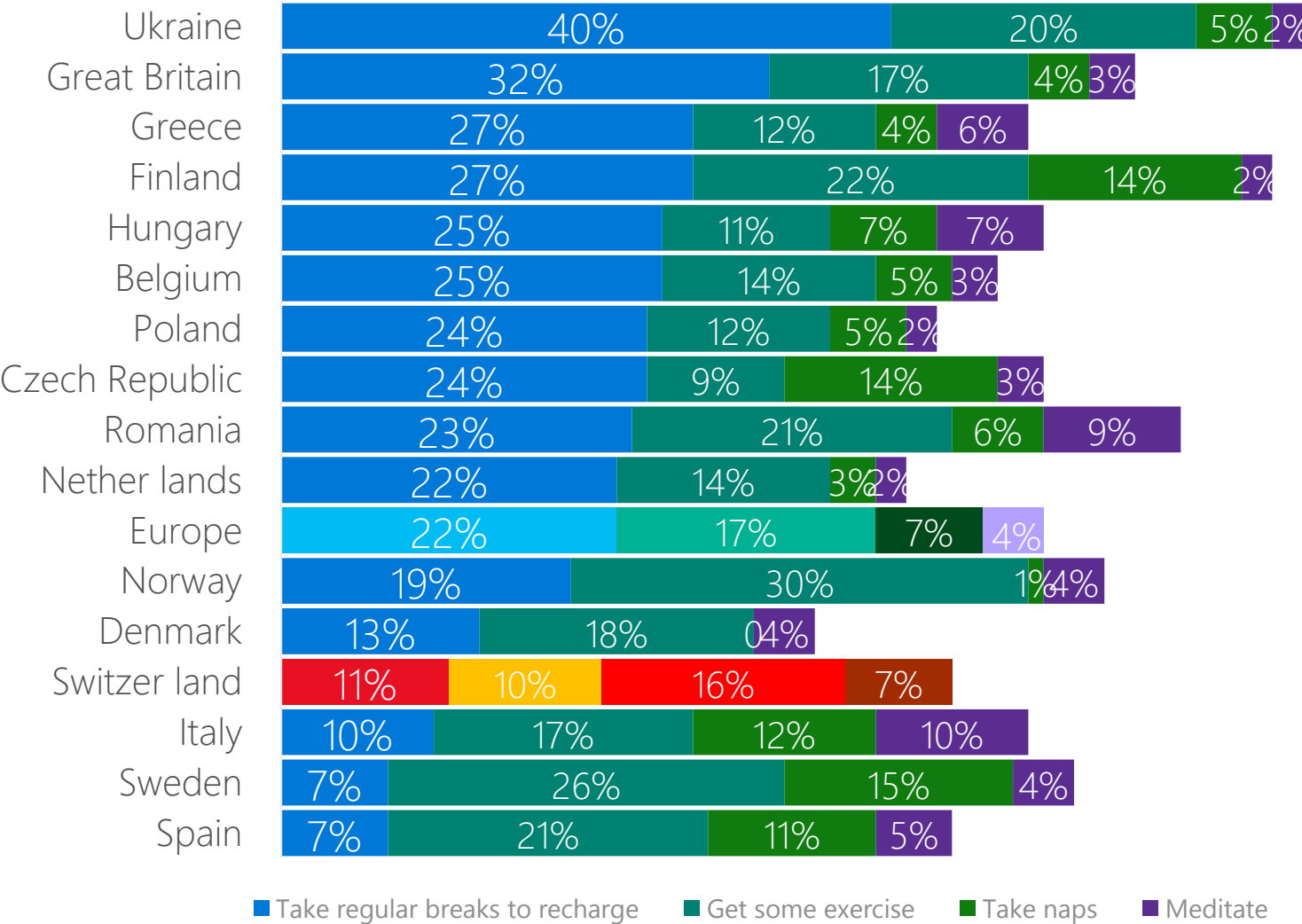
10%

get some  
exercise

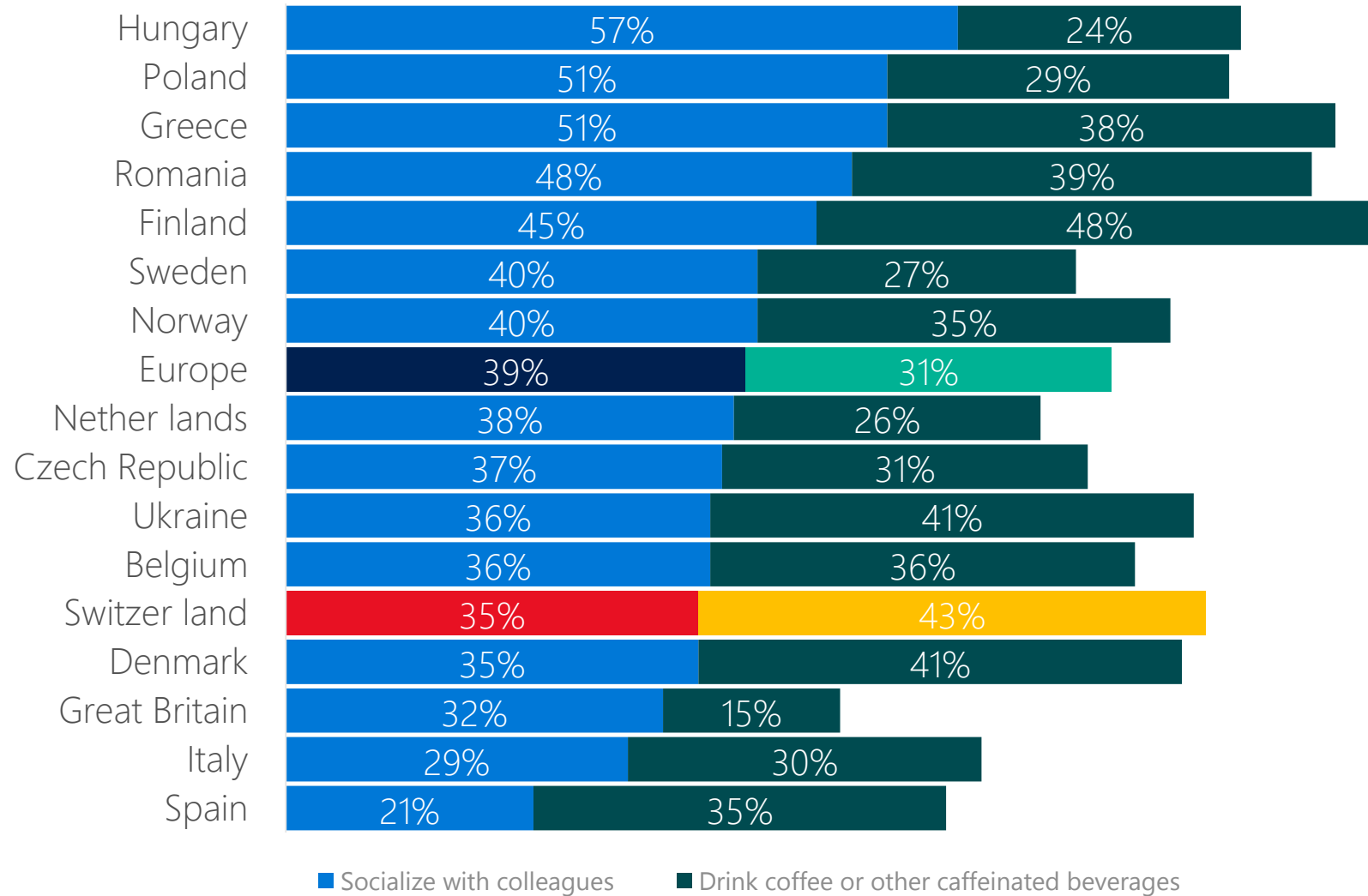
# Lunch habits



# Well-being



# Social at work

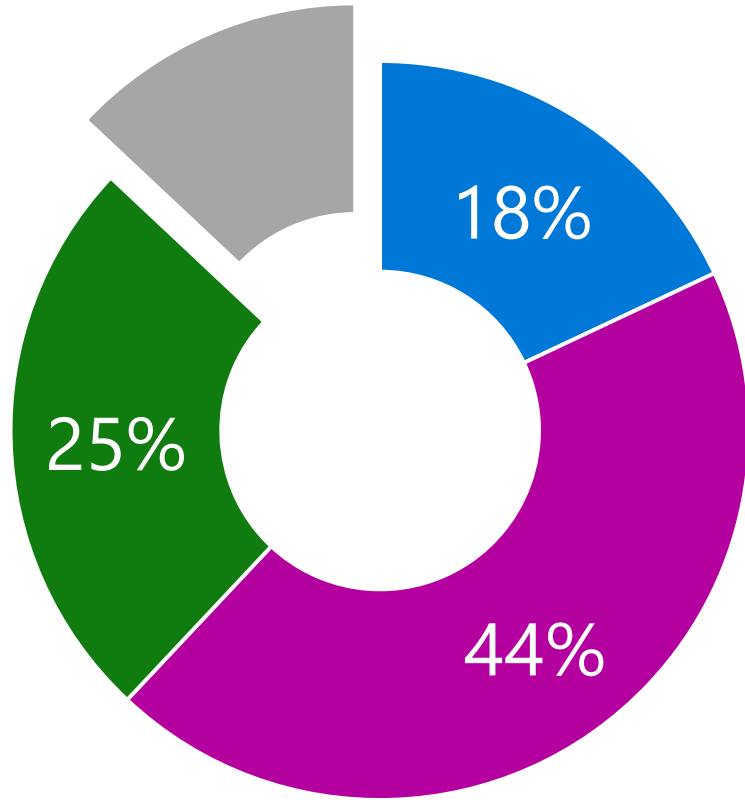




Business Success



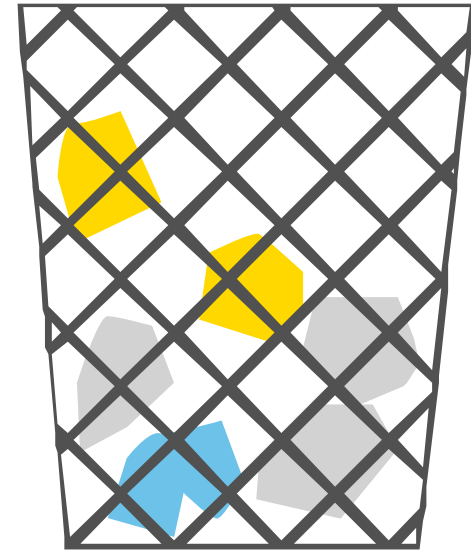
# Use of IT by SMBs

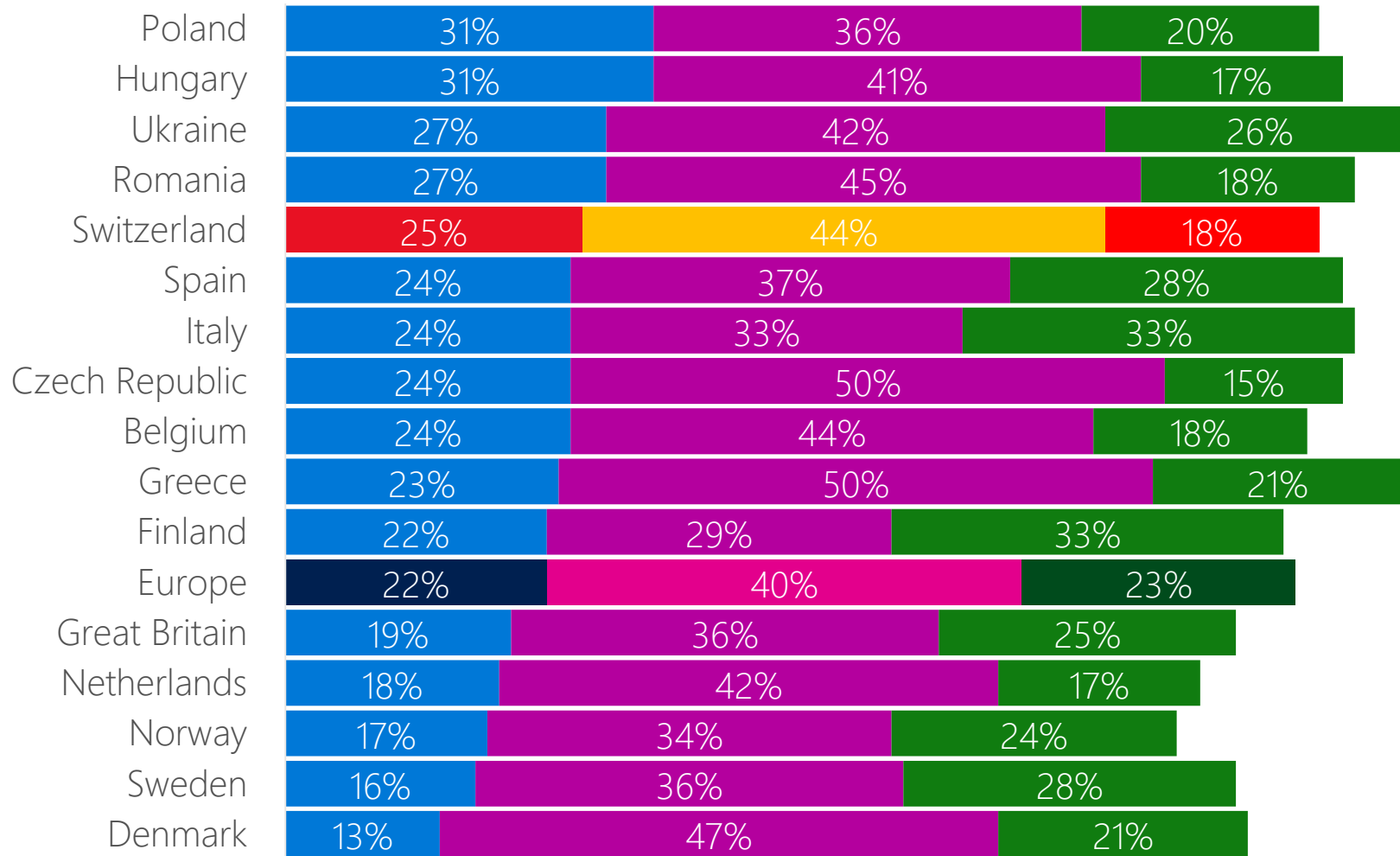


Almost paperless, very connected online and a lot of our processes are automated

We're updating our processes and putting them online

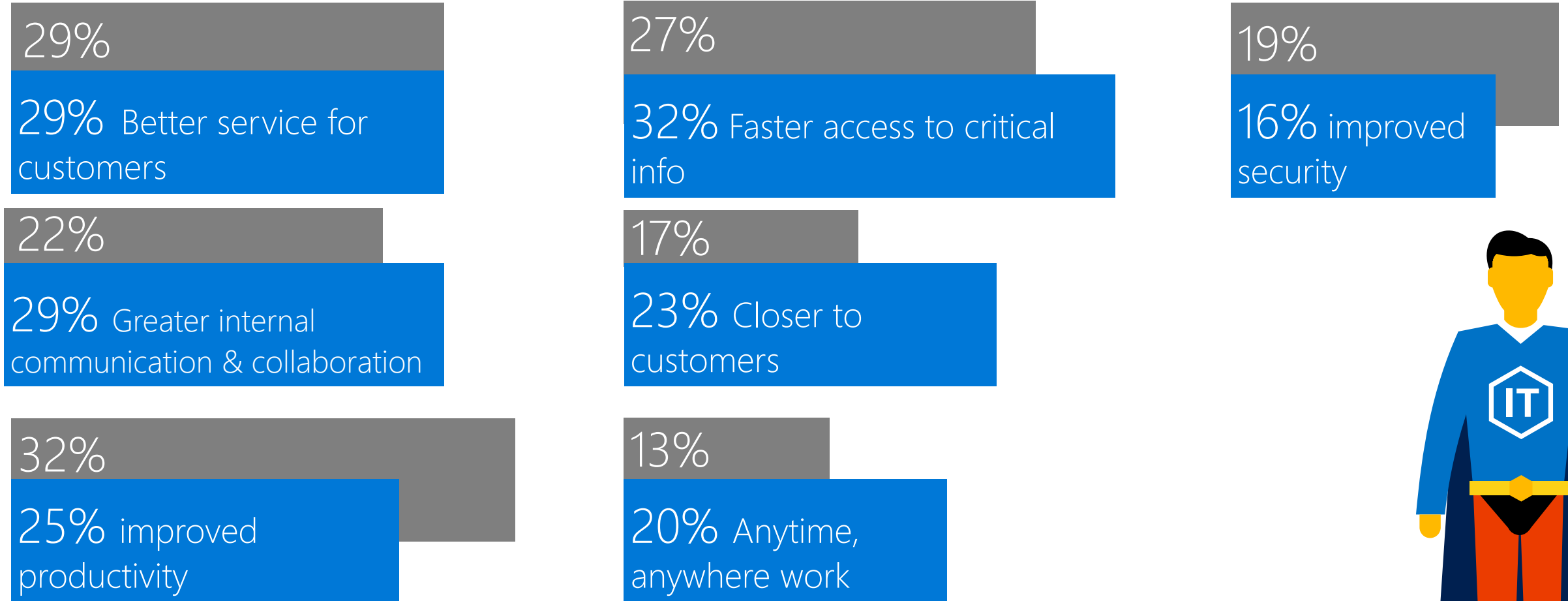
High volumes of paper in our day to day work and most of our processes are offline



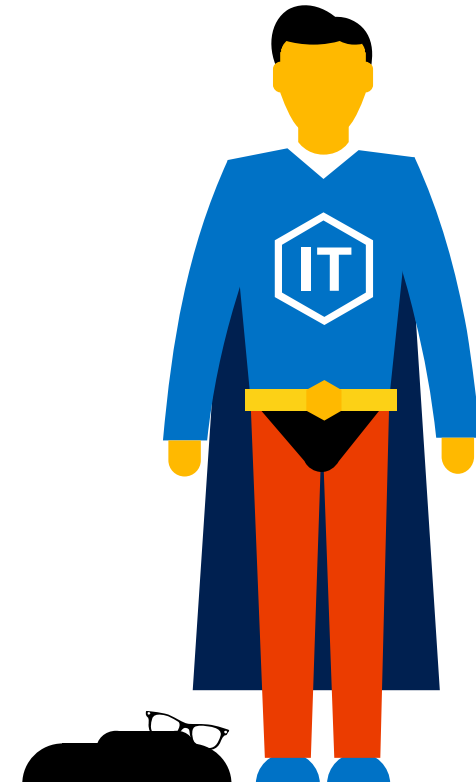


- We're almost paperless, very connected online and a lot of our processes are automated and online
- We're updating our processes and putting them online, but we still use paper for some processes
- We use high volumes of paper in our day to day work and most of our processes are offline

# Benefits of IT...



■ Have Resulted    ■ Would Achieve



# Priority for the Business

Connect better with customers

36%

Enable anywhere working

30%

Use technology to reduce costs

24%

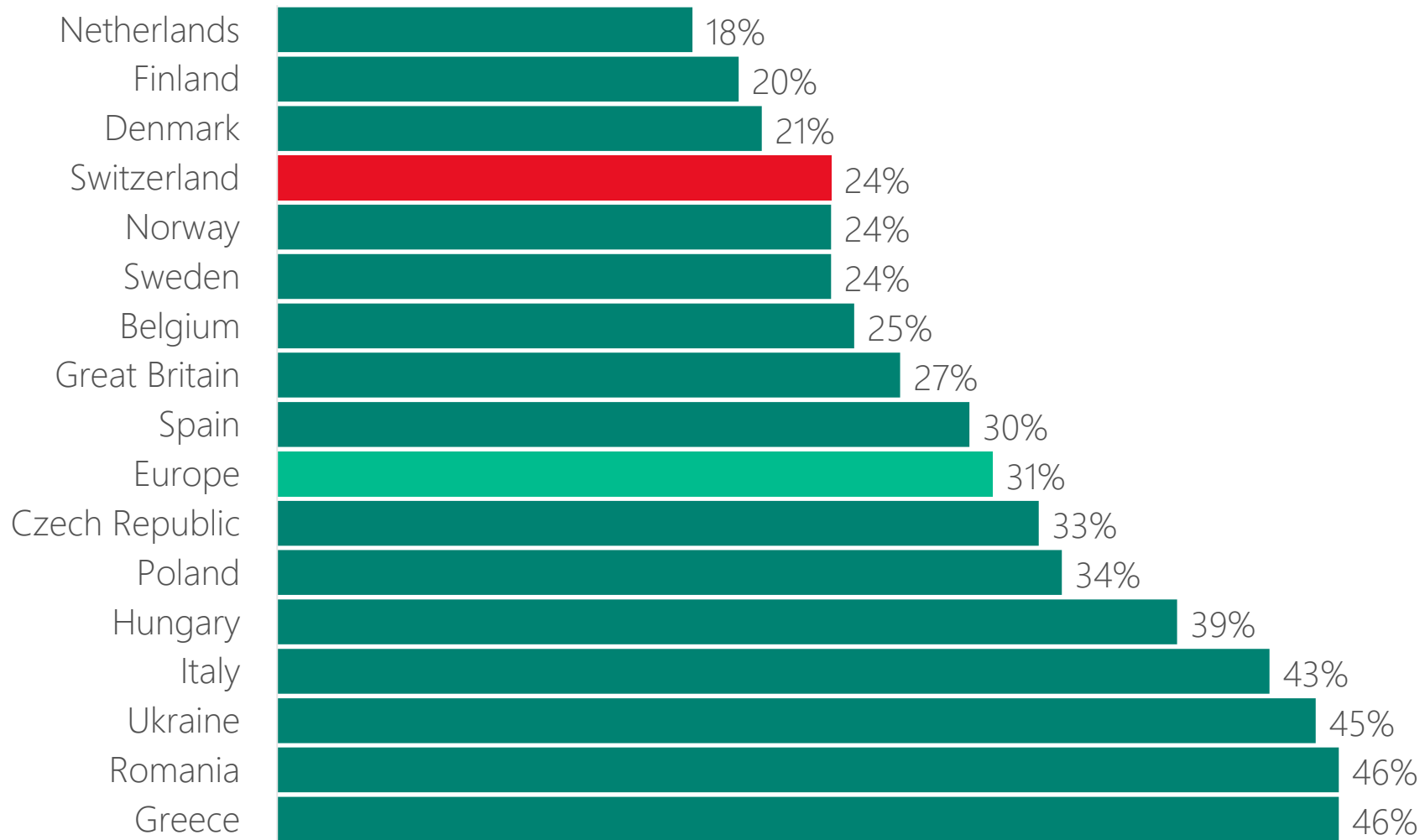
Use technology to enable business growth

24%

Keep Data Protected

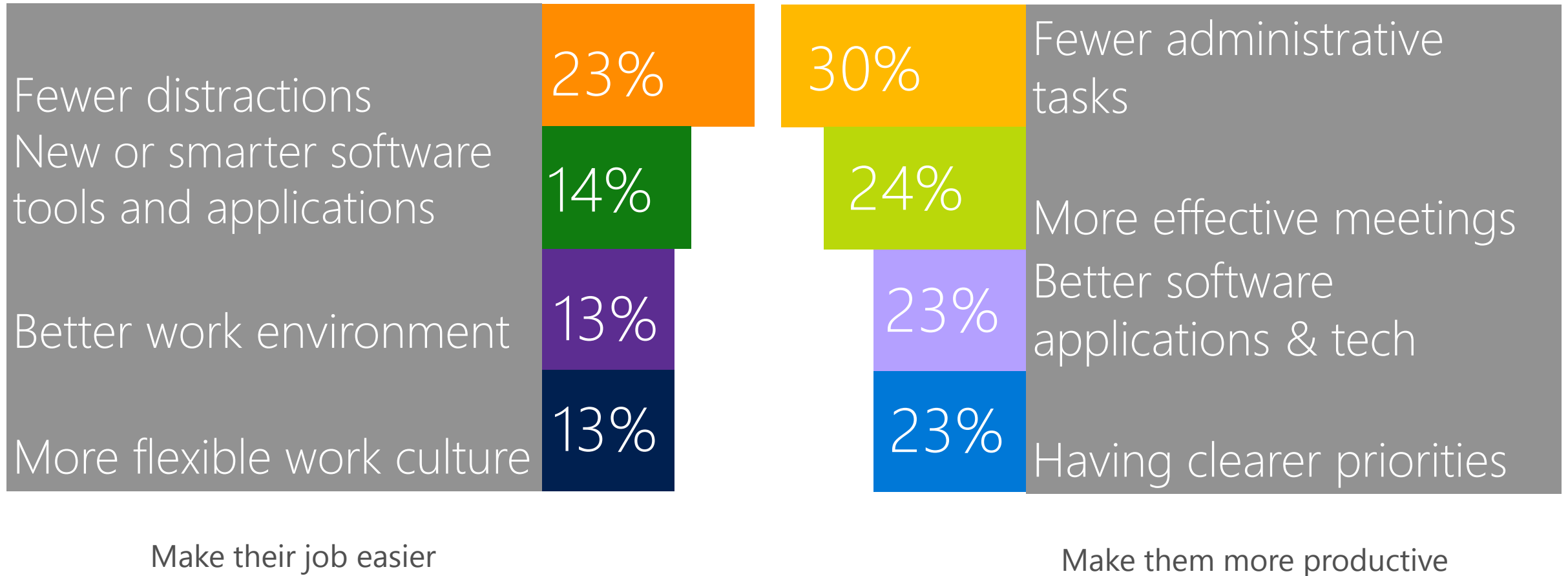
15%





Think it's a priority to use technology to reduce costs

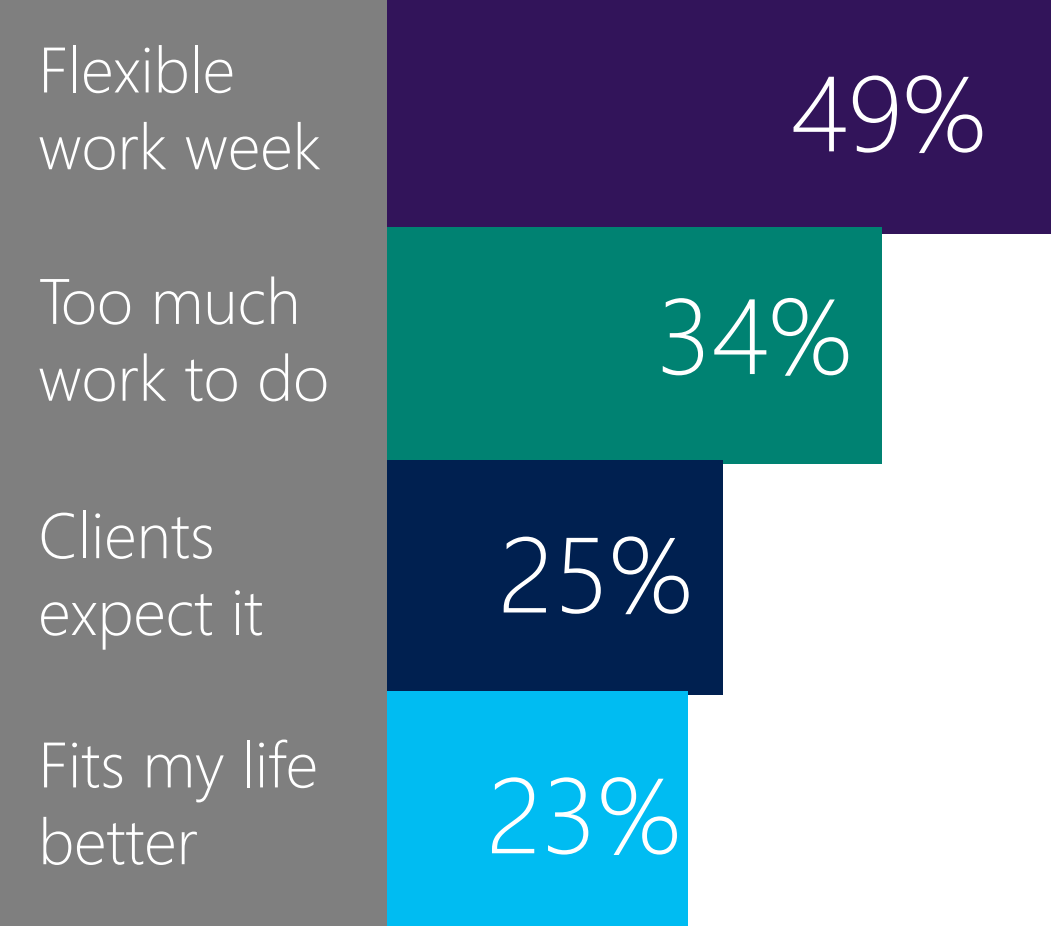
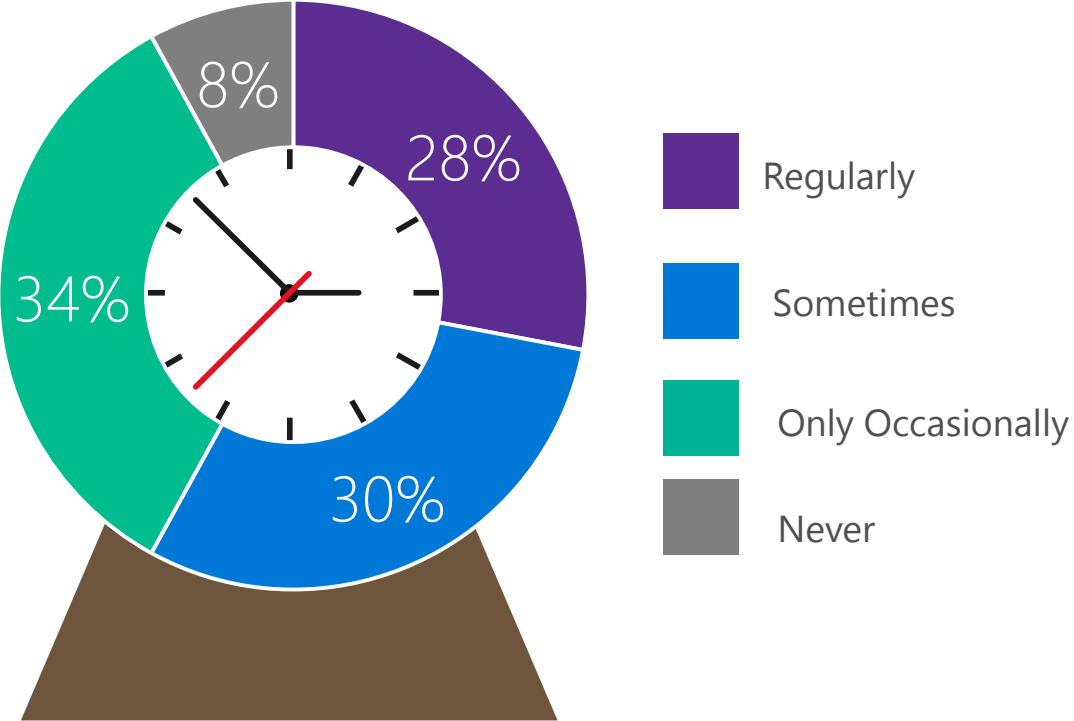
# ...and for the employees





Work anytime, anywhere

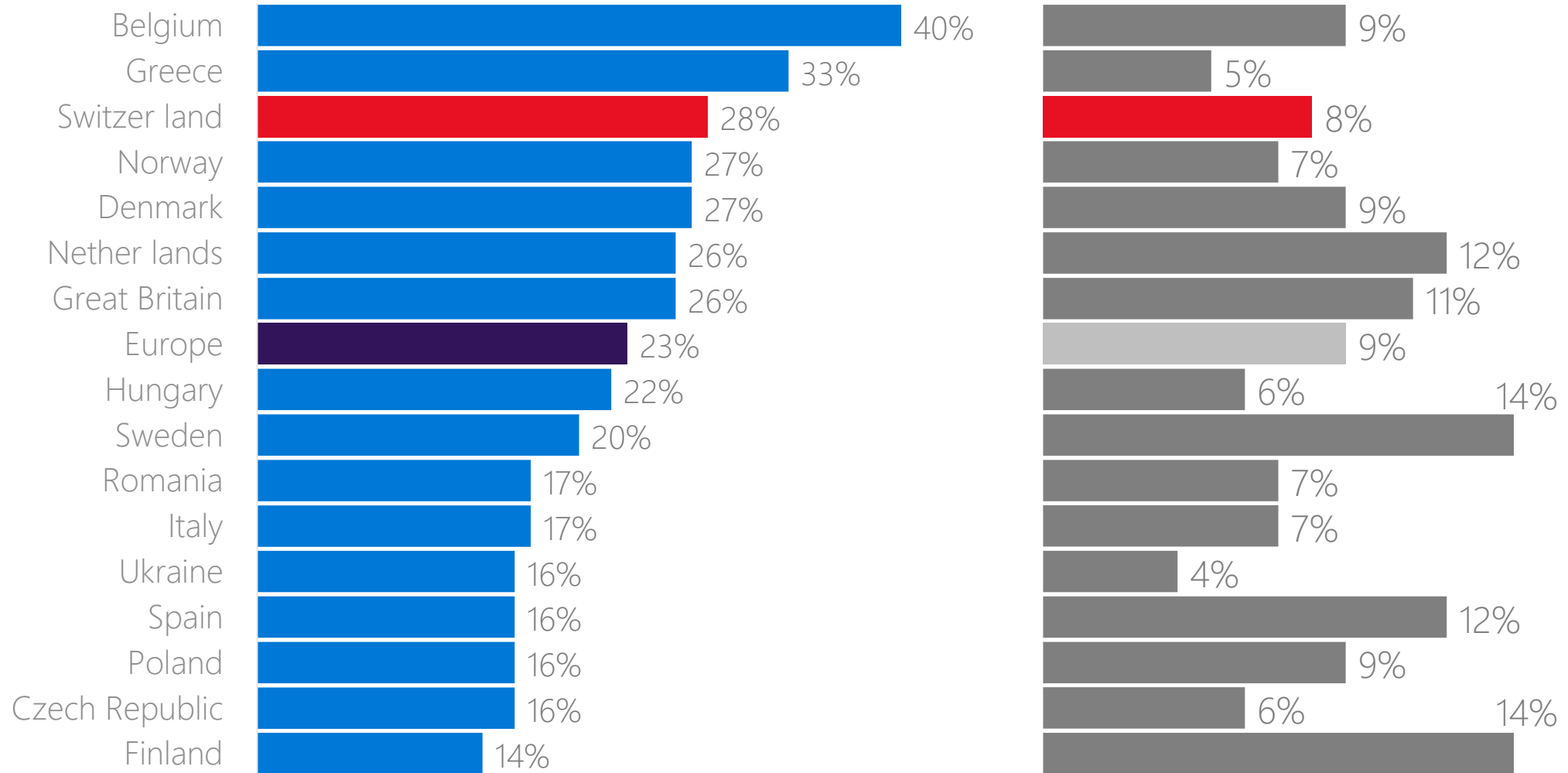
# Working outside regular hours



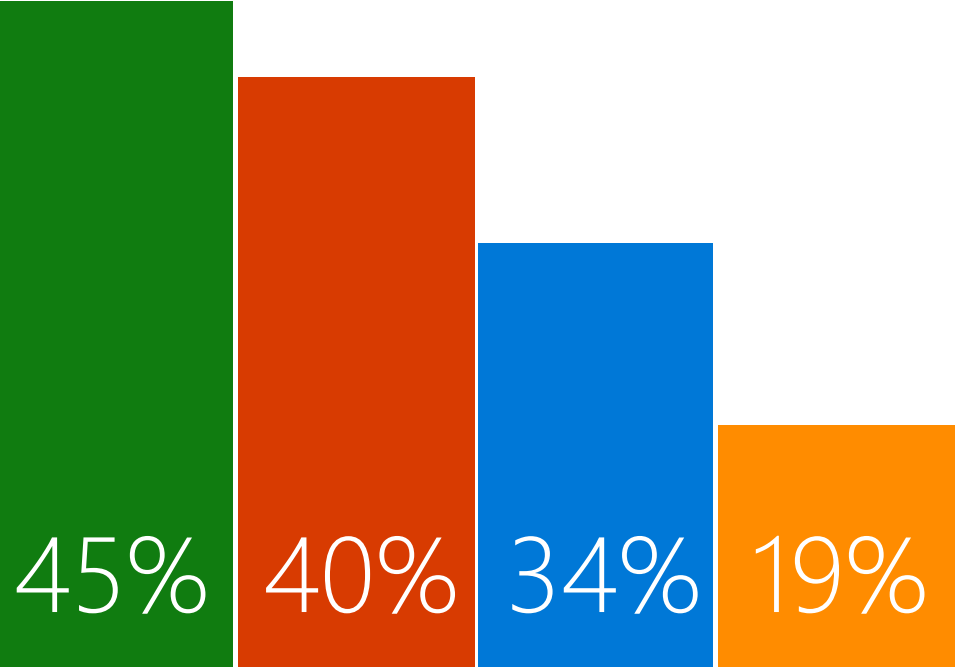


## Regularly

## Never



# Ways to access work remotely

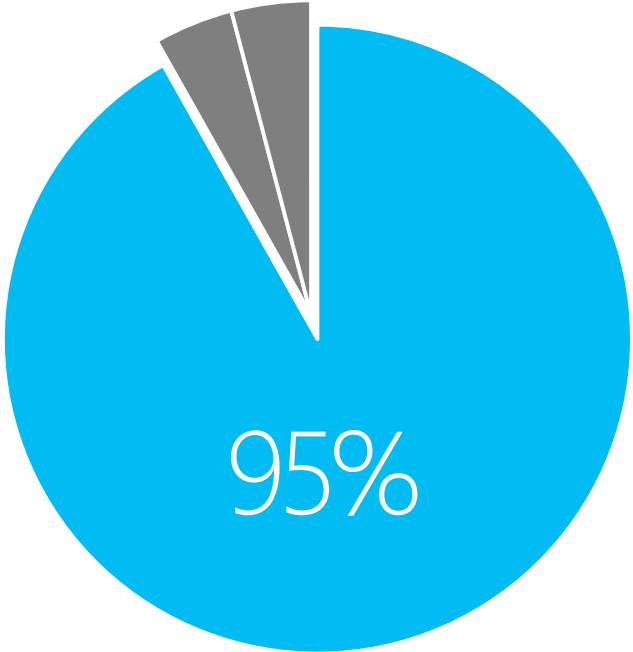


Remote Desktop

Cloud service

Personal Email Transfer

Cloud File Transfer



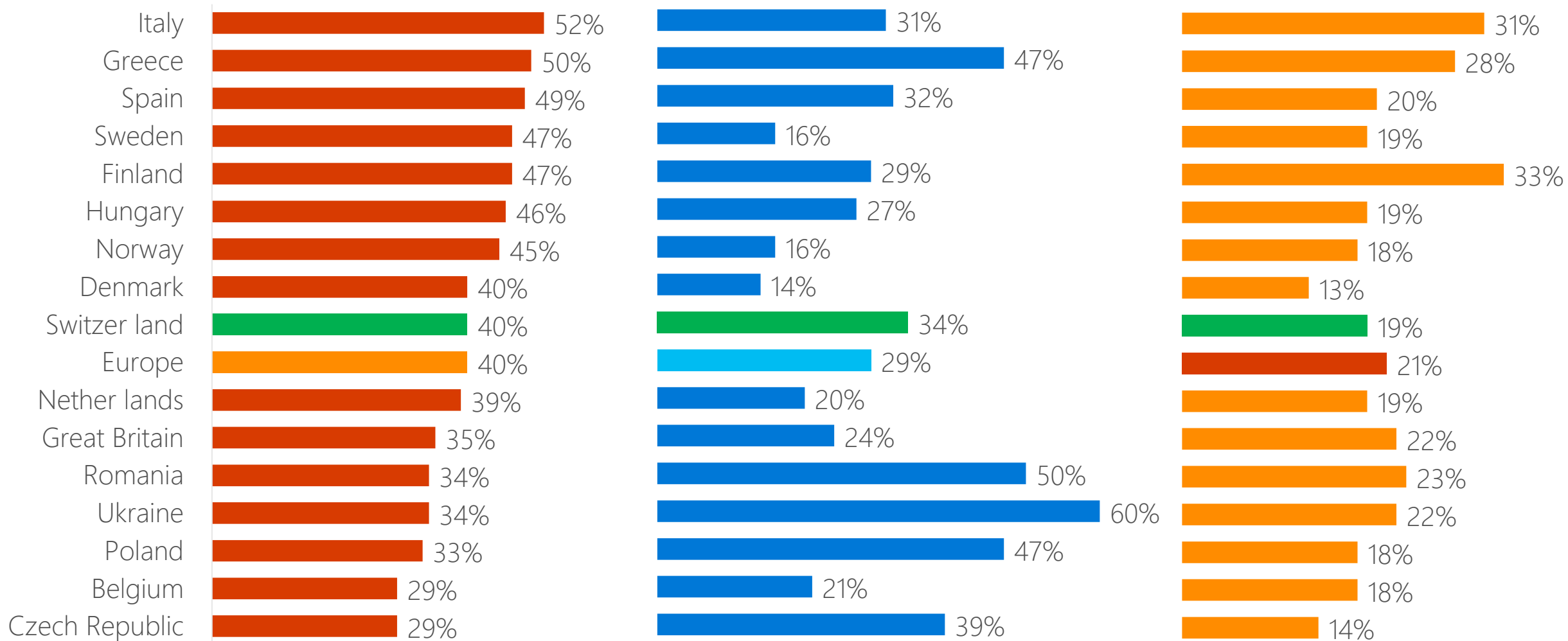
Yes my company is aware that I access files by using my personal mail or cloud file transfer



## Email Cloud Service

## Transfer through personal email

## Transfer through cloud service

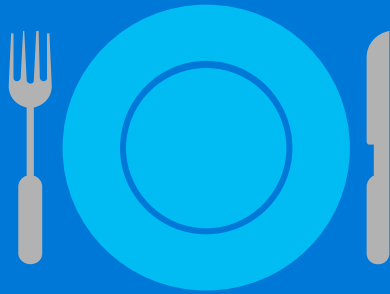


# Getting work done: anytime, anywhere



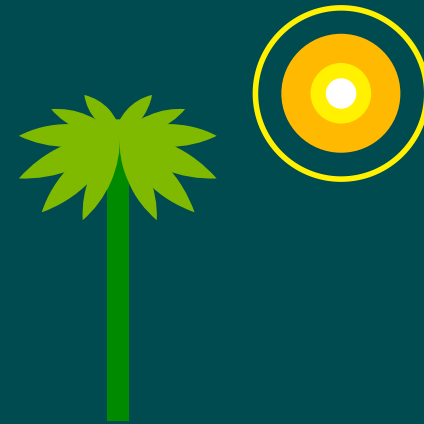
24%

first thing in the morning



22%

right after the evening meal



17%

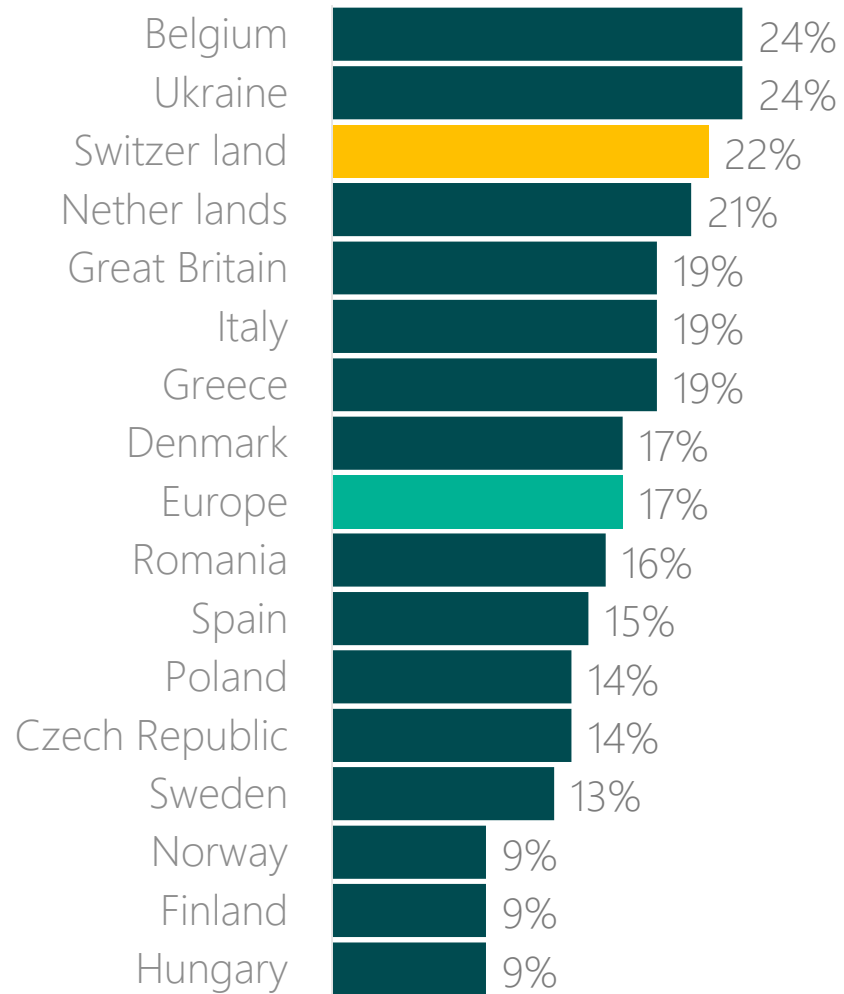
while on holiday



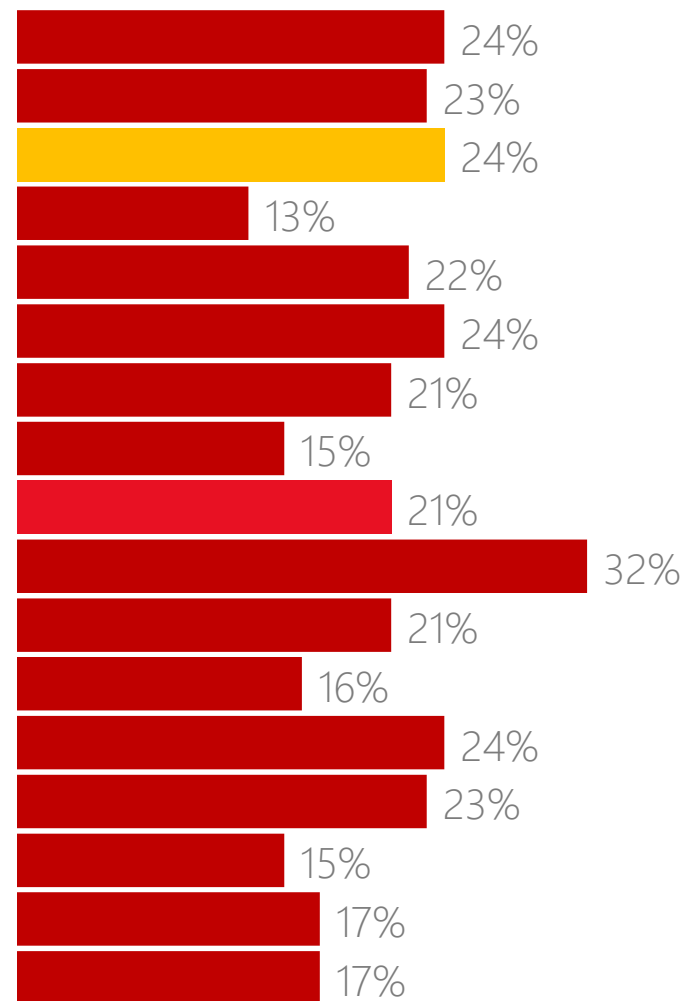
4%

during the commute (public transport)

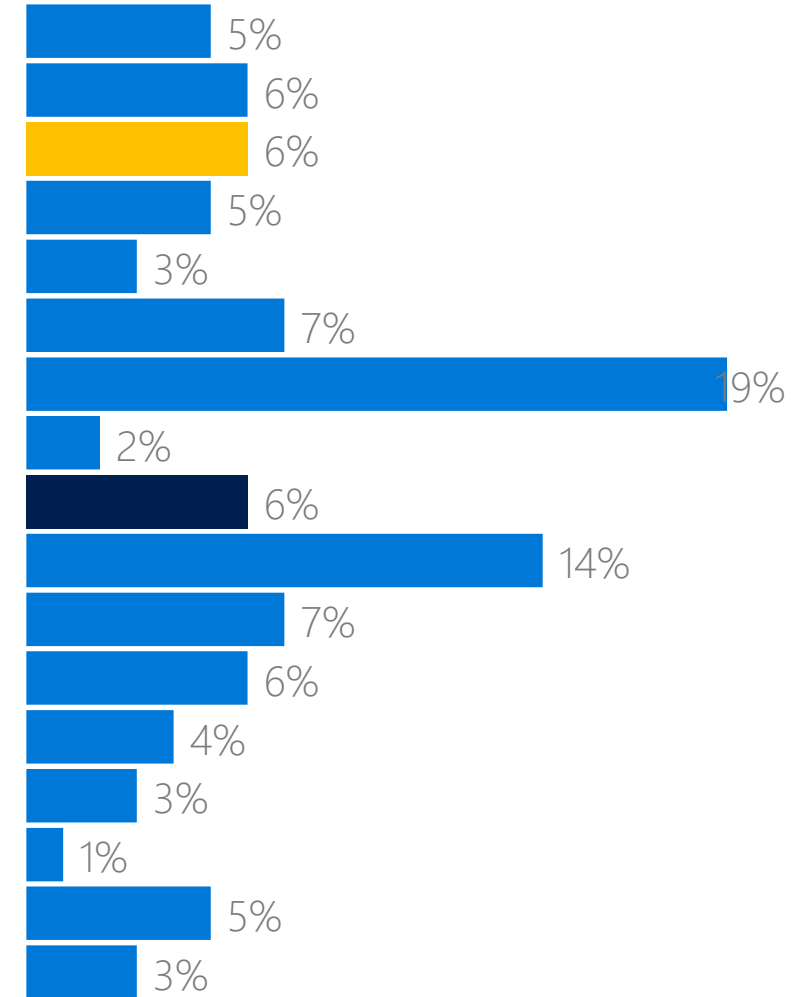
## While on vacation



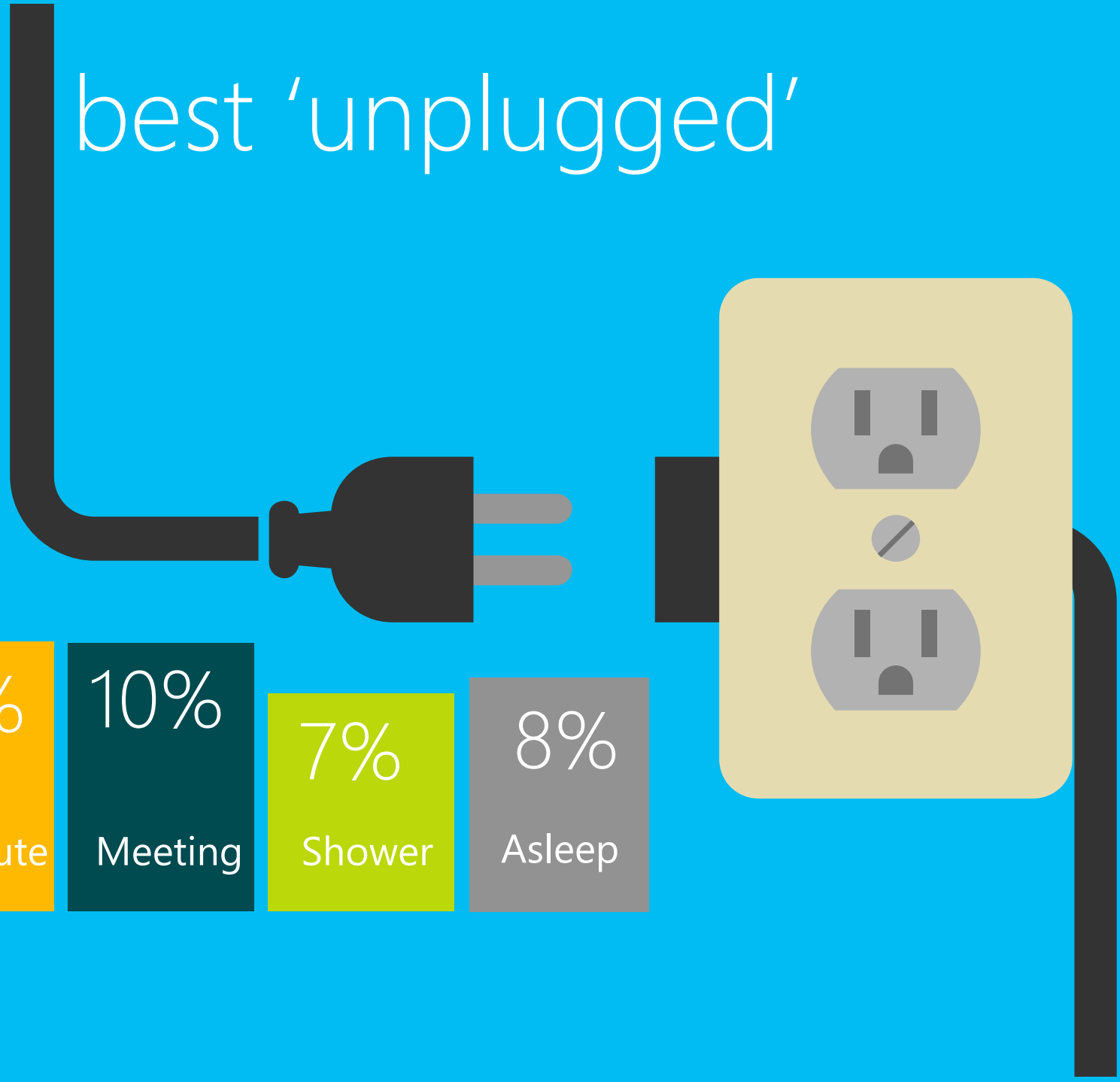
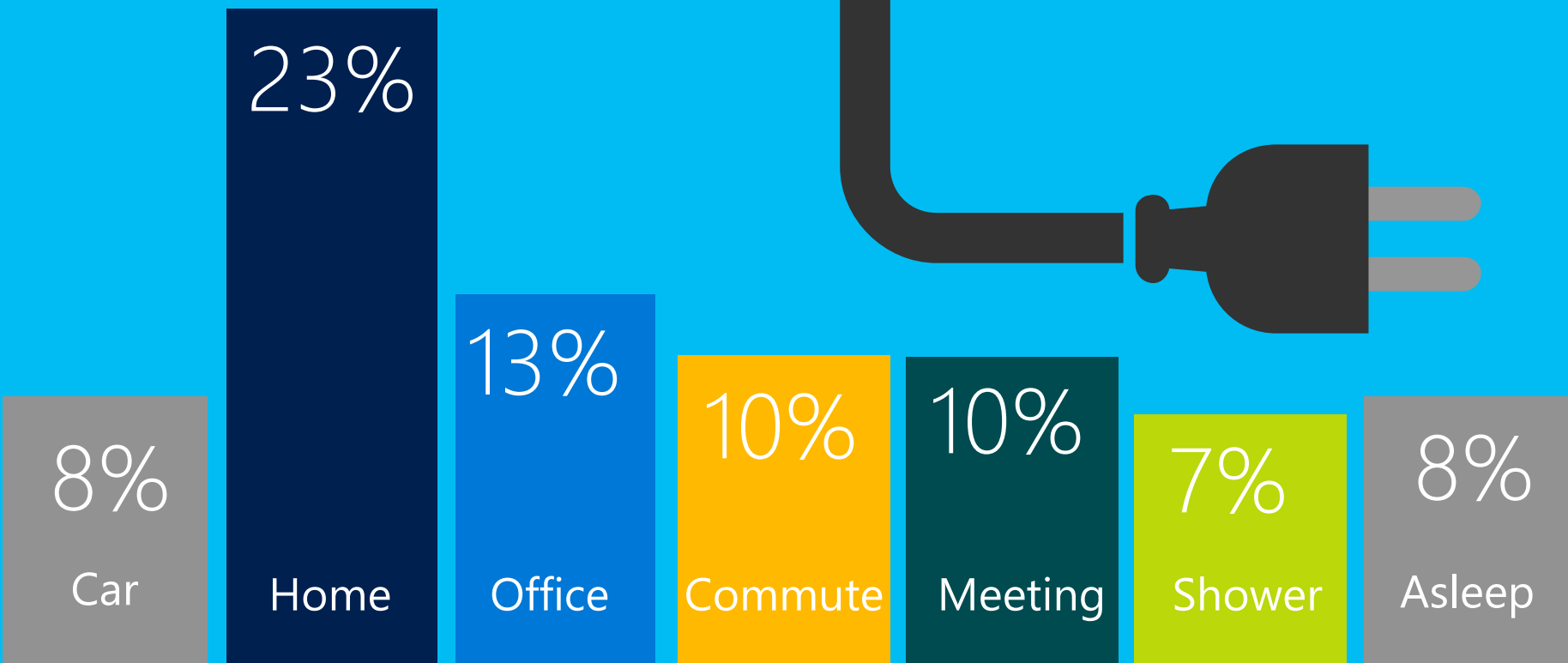
## First thing in the morning



## Socializing with friends



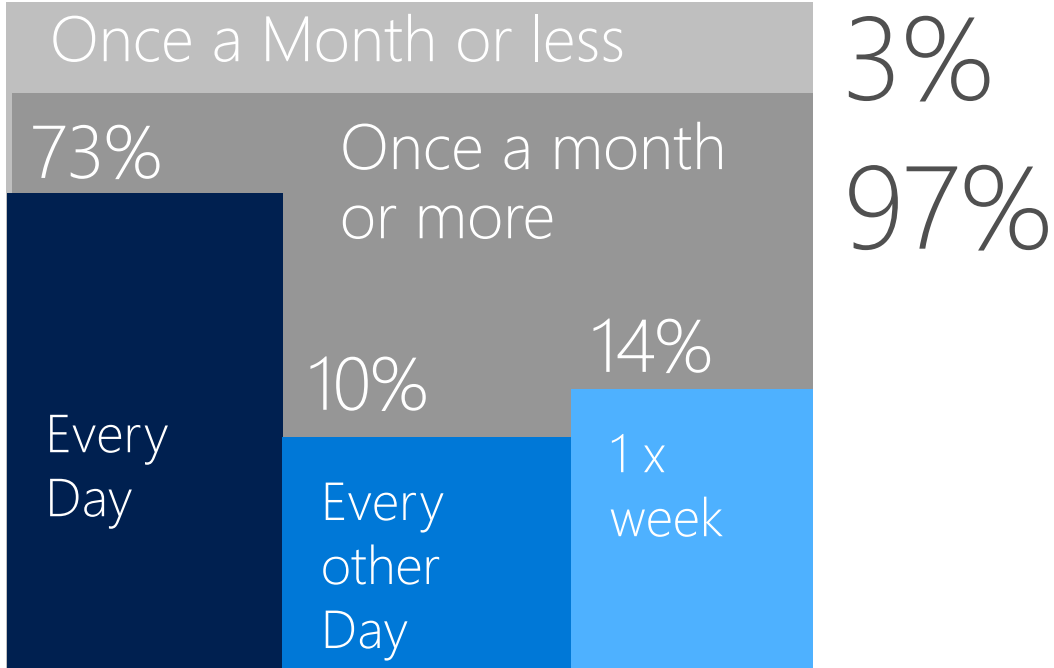
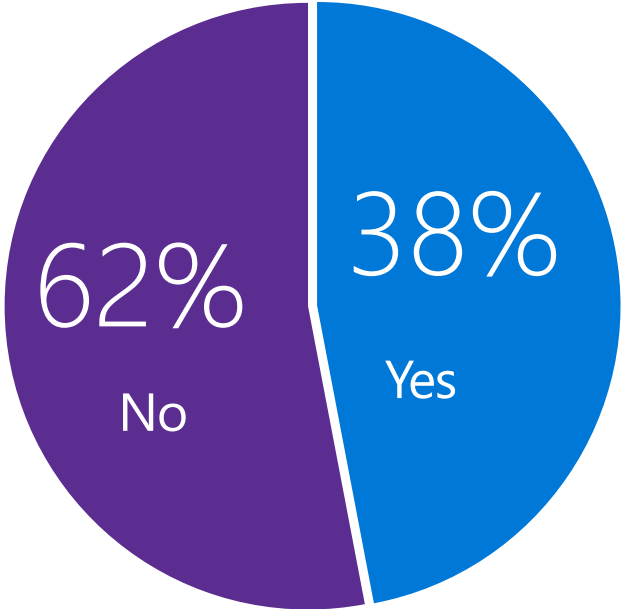
# Inspiration comes best 'unplugged'





It's not just work...

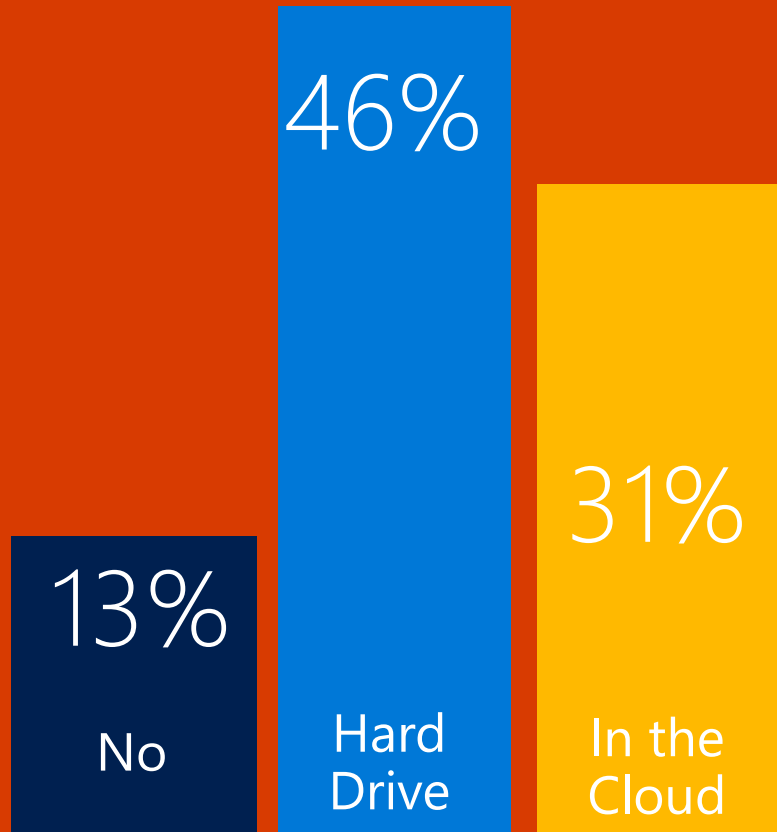
# Work devices but for personal use...



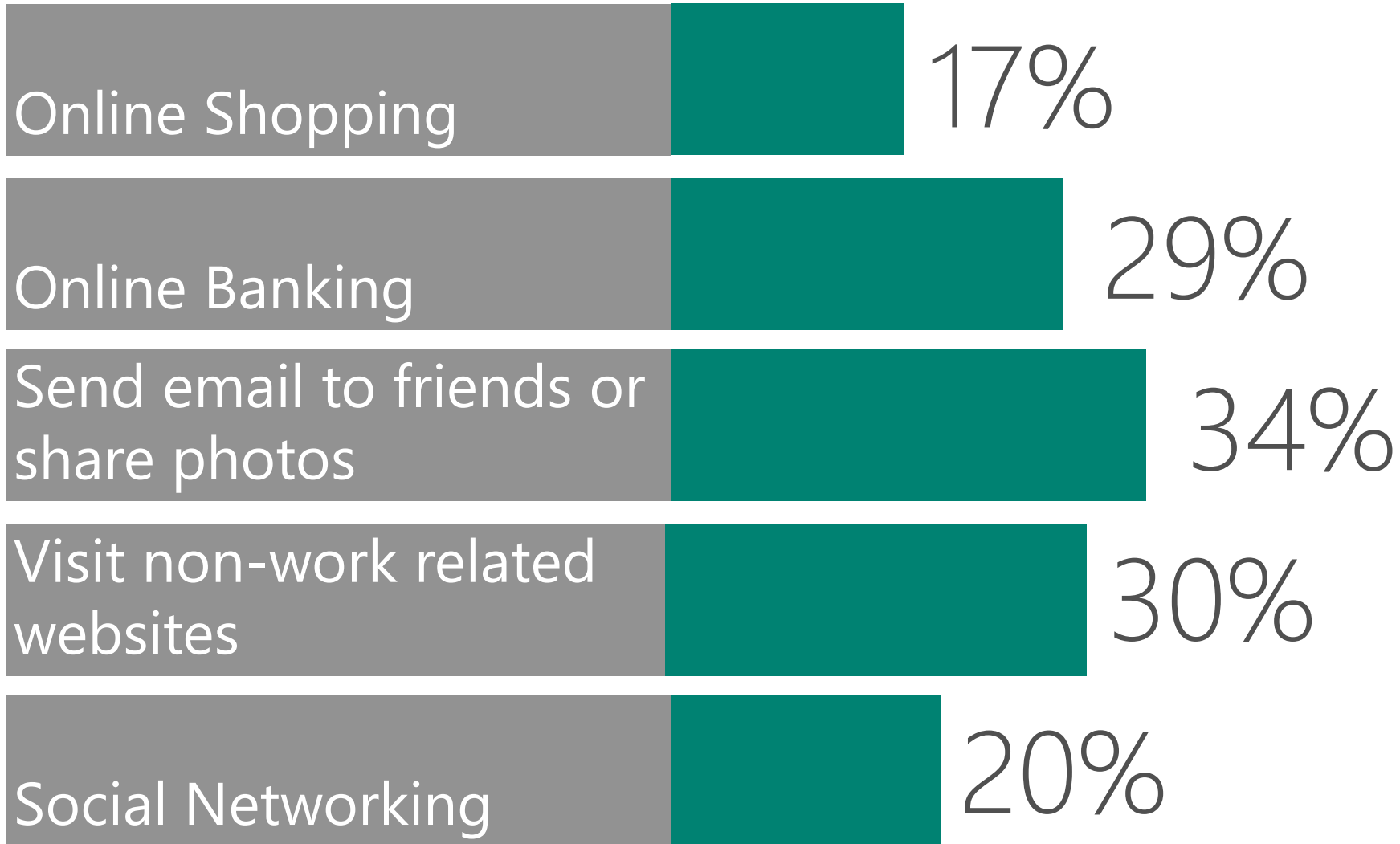
Those who use an employer-owned device for work say they use it for social networking, gaming, online shopping or personal email.



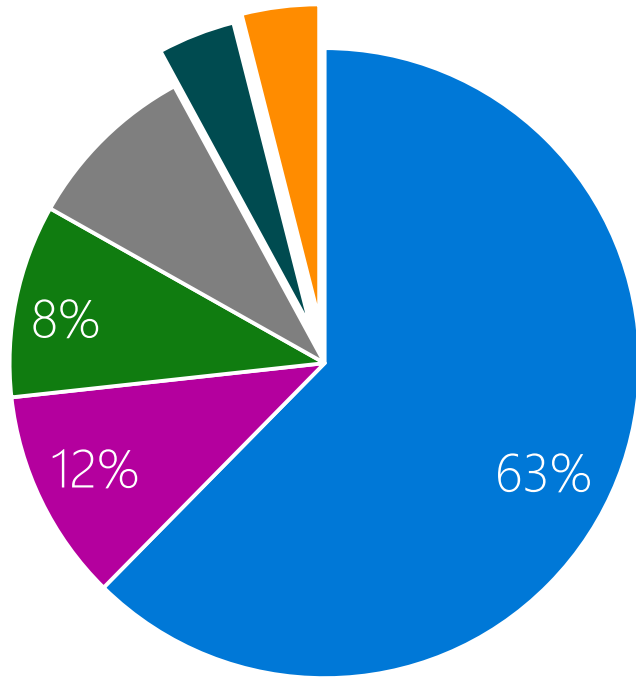
# Have their data backed-up...



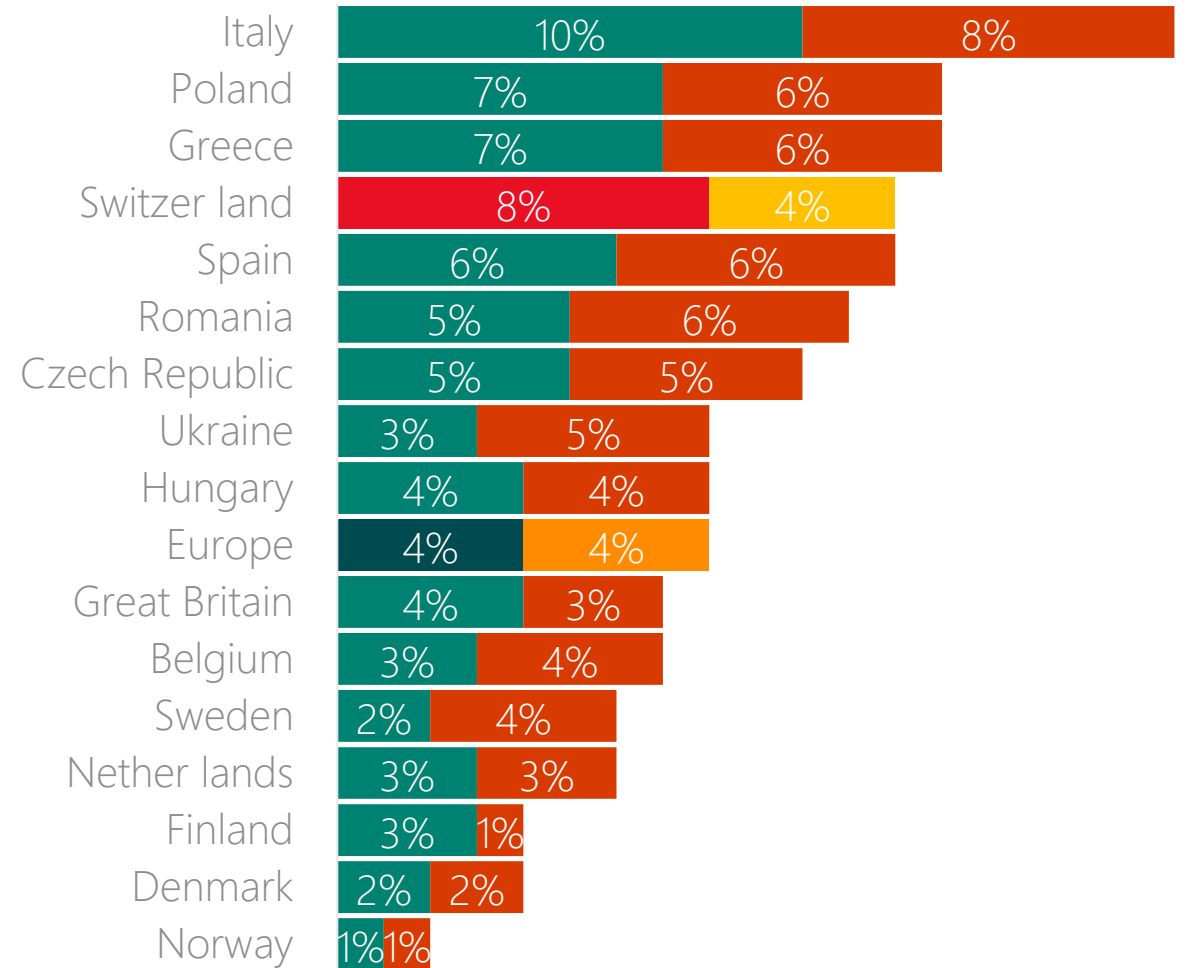
# 'Homing from Work'...



# ...with their manager's consent



- Have manager's approval
- Outside of regular working hours
- Not allowed but do it anyway



- Not allowed & have to keep it secret
- Not allowed and social media, gaming, shopping sites are blocked

# What's most important for employees...

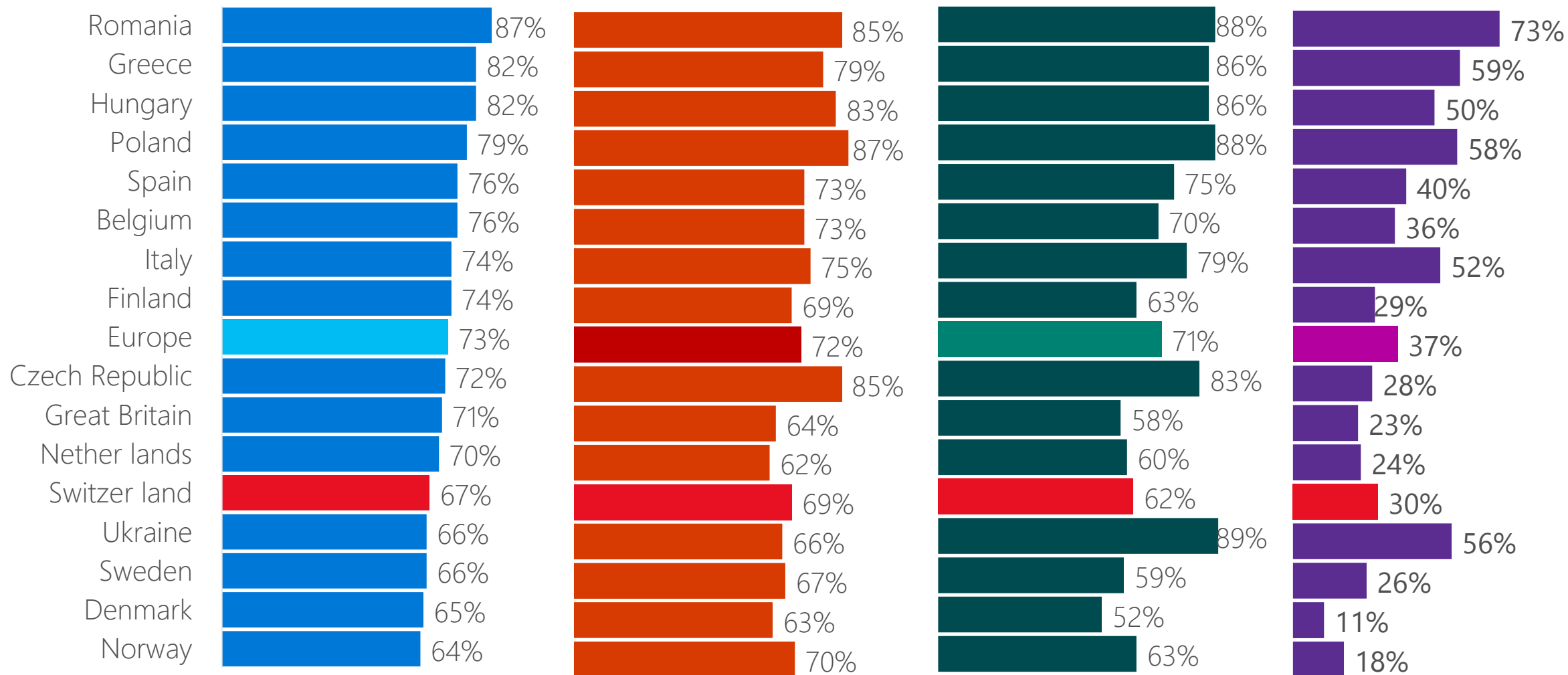


## Work/life balance

## Job Security

## Salary

## Promotion Prospects



# An extra hour in the day...

