

SURVEY RESULTS

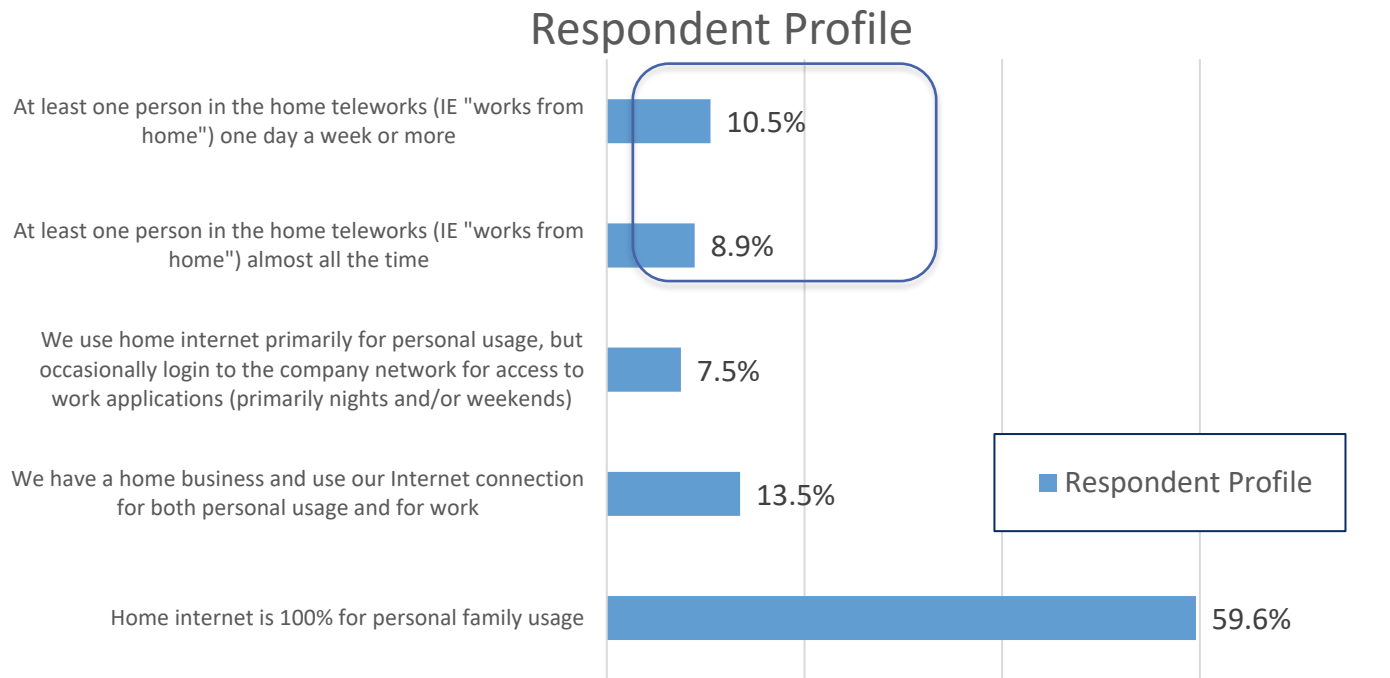
U.S. Telecommuter Connectivity Analysis

FEBRUARY 2020

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Survey Respondent Make-up

Which of the following statements best describes your household internet usage? (All survey respondents)



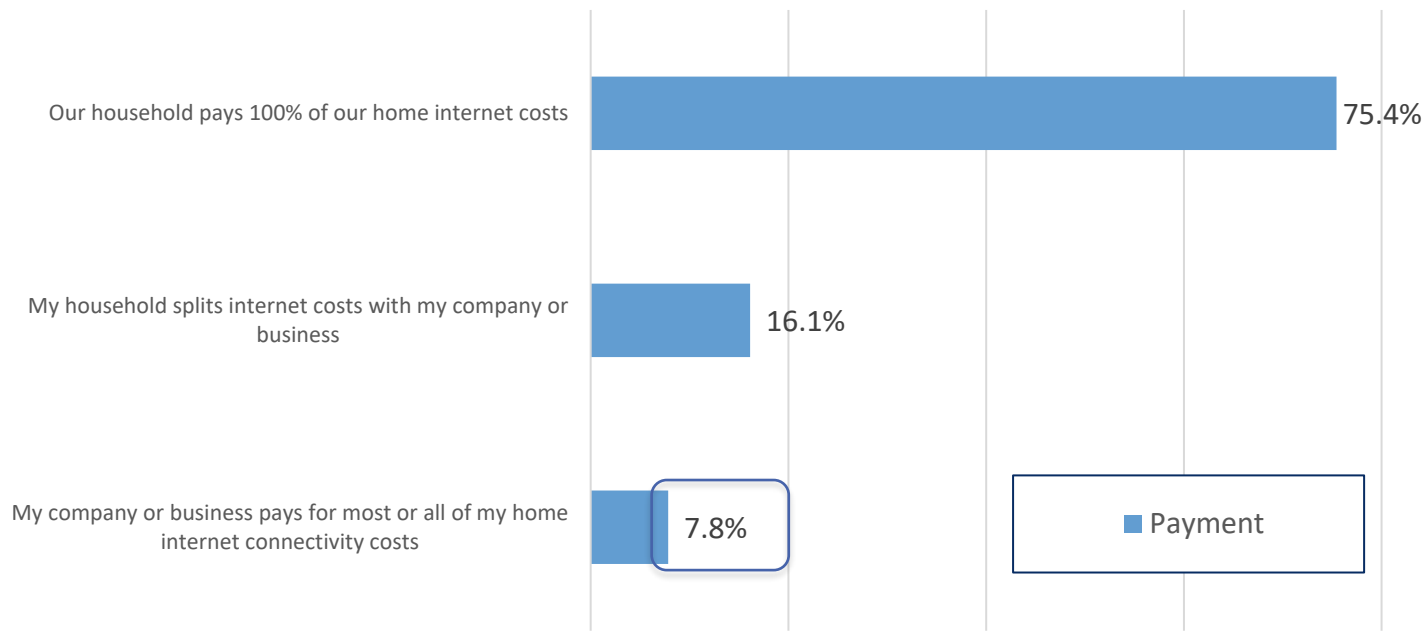
N=2733

Almost 20% of respondents indicated working from home multiple times per week – this equates to approximately 32 million U.S. employees

**This data closely aligns with 2016 Gallup polling and 2020 projections based on U.S. Census information*

Company payment for telecommuter internet

Which of the following most closely describes your home internet situation?



75% of telecommuters indicate that they pay for their own internet connectivity

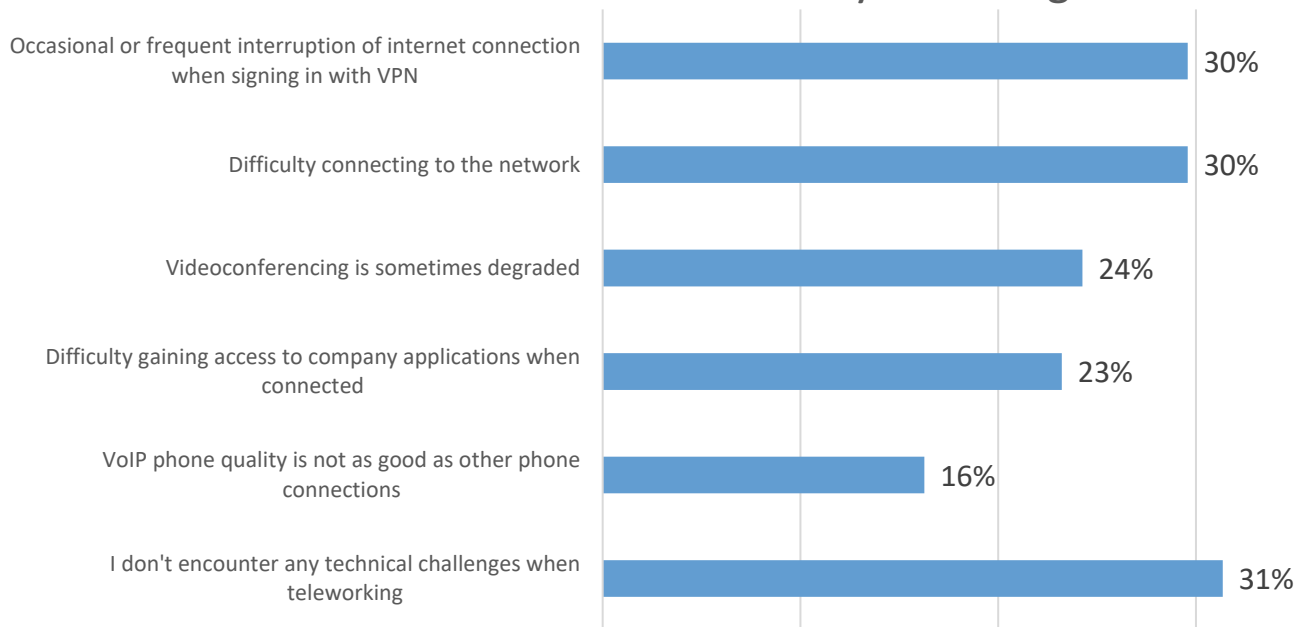
Only 7.8% indicate their employer pays 100% of their home internet connection costs – even when they are working from home most of the time...

N=676

Telecommuter Challenges

What are the biggest technological challenges you face when connecting to your company's network? *(Please select all that apply)*

Telecommuter Connectivity Challenges



Almost 70% of telecommuters indicate there are technological challenges associated with their work at home arrangement

N=676

About the Research

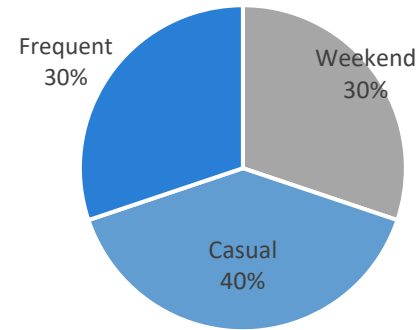
Principal Analyst, Matt Davis is the founder of Independence Research and the author of this report. Matt has 20 years of experience analyzing broadband deployment strategy and service provider competition.

Today's Presentation:

- Deep dive on U.S. Telecommuter technology usage
- Highlights telework applications and VPN options
- Examines on-boarding and training of teleworkers by company

Survey Methodology: This report highlights survey findings from over 650 telecommuters spanning the U.S. marketplace. This online survey utilizes a panel and was sent to field and returned in January 2020.

Telecommuter Categories



Frequent: At least one person in the home teleworks (IE "works from home") almost all the time

Casual: At least one person in the home teleworks one day a week or more

Weekend: We use home internet primarily for personal usage, but occasionally login to the company network for access to work applications (primarily nights and/or weekends)

Other questions..

- ✓ *What work-related applications do you typically access when teleworking? (Please check all that apply)*
- ✓ *For your teleworking activity, does your company supply you with a software or hardware VPN?*
- ✓ *What is your view of your company's customer support for your teleworking situation*
- ✓ *In what areas could your teleworker experience be made better? (Please select all that apply)*
- ✓ *When setting up your telework situation, did your company provide training or any other type of on-boarding to help you get set up?*

Thank You for your interest in our survey.

For the full results please contact me at the address below...

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