

# Cisco Broadband Index

Workforce Insights  
on Access to  
Internet Services



The bridge to possible



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# Executive summary

Governments and policymakers across Europe have committed to improving connectivity – but workers demand that they accelerate efforts to bridge the digital divide.

Our working lives are changing fast. The Covid-19 pandemic has caused the vast majority of the workforce to be temporarily shut out of their office roles, and some may never be back on-site full time.

With flexible working increasing and people spending more time online comes a clamour for better internet access. Across Europe, many are struggling for reliable connection as they try their best to remain productive.

To discover how people feel about their current connectivity Cisco has surveyed thousands of workers in six major European countries.

Governments in all of the markets we surveyed have publicly committed to improve connectivity.

It's a political hot potato: 81% of the workforce are calling on their leaders to accelerate plans for high-speed and reliable internet as Europe strives to leave the pandemic behind.

Our study found out that 76% think quick and reliable internet is crucial for rebuilding economies, while 78% of employees believe it's a "necessity".

Meanwhile, 72% say access to broadband is essential to developing a well-educated and informed population. A further 53% state investment in universal connectivity is now as important as spending to maintain public utilities infrastructure. 47% would pay more for a safer connection.

Urgency is clear – as is the digital divide that threatens inclusive recovery from the pandemic crisis: 46% say unreliable connection across the countries we surveyed meant they missed out on access to critical services such as online doctor check-ups and virtual school lessons.

In addition, 66% believe affordability will soon become a major issue across Europe in the absence of action from policymakers and service providers (SPs) – who, for their part, are starting to tackle the issue. This is vital, because without SP expertise our internet infrastructure would collapse.



## A new digital deal

Insufficient access is a wide-reaching problem that touches people across all age groups, income brackets, and levels of education.

To underpin sustainable recovery, changing the economics of the internet by transforming our network infrastructure is essential, as is close collaboration between policymakers and SPs.

We need to ensure connectivity creates an equal level playing field – working faster, harder and reaching everyone.

Digital connectivity has been described as a “precondition” for the EU achieving its digital agenda. We welcome the Recovery and Resilience fund’s digital focus that will help pave the way for long-term recovery. The European Commission’s Digital Compass is another important initiative, in addition to national governments’ strategies to ensure broadband infrastructure reaches every household.

The existing efforts are encouraging, but there’s much more to do. Demand and intent are abundant – now time is of the essence.

**81% of workers are calling on governments to accelerate plans for high-speed and reliable internet**



# Spotlight: United Kingdom

Workers need improved internet access wherever they want to connect, and are keen for ministers and providers to deliver promised programmes



The UK Government has stated aim to ‘build back better’ following the pandemic, with a focus on **levelling up** opportunity across the country. Connectivity is a key part of this goal.

The target is for at least 85% of UK premises to have access to gigabit-broadband by 2025. Ministers will “seek to accelerate roll-out further to get as close to 100% as possible”.

Despite that, 72% of UK-based workers want an even quicker upgrade. It’s an issue that spans age groups, with consensus among older and younger workers. 48% even believe Government investment in fast, reliable internet is just as important as maintaining the national water and energy infrastructure.

## Upgrade urgency

63% say affordability of reliable broadband is set to become a major issue in the UK, and 66% view secure, fast, reliable connection as a necessity.

A majority also think that economic growth must be built on better internet access: 69% of workers state this. Furthermore, almost two thirds (65%) say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population.

Strongly linked to this sentiment, more than half of UK workers (55%) believe broadband should be free.

Collaboration between SPs and government is crucial to transforming the UK internet infrastructure to build a network that will satisfy immediate and future demand for strong, reliable connectivity.

## Key takeaways



**66%** say access to secure, fast, reliable connection is a necessity



**72%** think the Government should accelerate its plans to ensure high-speed, reliable internet for everyone in the UK



**69%** agree accessibility of fast and reliable internet is critical to future economic growth



**65%** say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population

Connection strength and reliability is an additional concern for UK users.

More than half of UK workers (54%) spend seven or more hours online per day, suggesting lines are blurring between personal and work use of internet at home; 43% of households saying three people or more who share their home connect throughout the day.

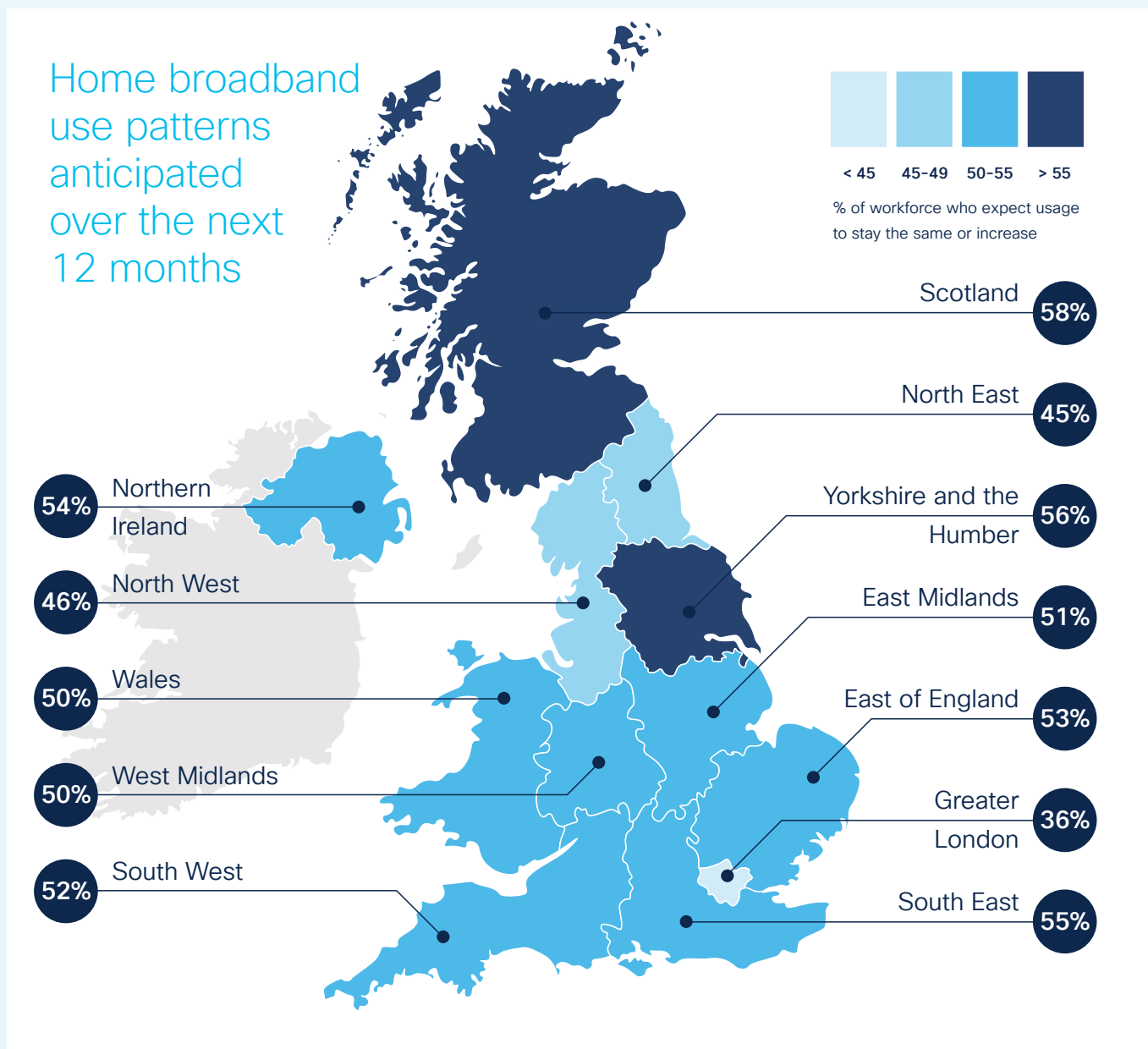
During the next 12 months, 50% expect their overall internet usage to stay the same or grow. A further quarter expect to use the internet less than they do at present, but suspect their time online will not return to pre-pandemic levels.

### Access anxiety

50% rate connectivity a critical factor in where they choose to live. Of this figure, 18% say they either moved home recently without realising their new location has poor internet connection, or they have pinpointed where they'd like to move to but there is no connection available.

Meanwhile, 71% of workers in the UK say broadband services must improve dramatically in order for people to be able to work anywhere.

Nearly 4 in 10 (38%) hybrid workers, and 30% of those who work remotely full-time, claim their home connection is only average or weak meaning they cannot rely on a strong connection. As a result, almost three in 10 (29%) hybrid workers claim they'll upgrade within a year.



# Spotlight: France

While France is making significant efforts to boost internet access the country's workforce is eager for the Government to go even faster



The French Government is working with Service Providers to deliver fast broadband access (30Mbps) to all households by 2022 via the France Très Haut Débit programme, with fibre installation promised by 2025.

2020 was a record year for the initiative, with 5.8 million properties made eligible for fibre. The Government is also expected to invest €240m in broadband as part of a post-Covid stimulus package, partly funded through the EU Recovery Fund.

Despite this more than four in five workers in France (82%) think the upgrade should be quicker.

Over half (51%) also believe government investment in fast, reliable internet is just as important as maintaining other public utilities such as the national water and energy infrastructure.

## Going for growth

Almost six in ten respondents (56%) think affordability of reliable broadband is set to become a major issue in France, while 80% view secure, fast, reliable connection as a necessity.

A majority also think that economic growth must be built on better internet access: 74% of workers state this. A similar proportion of people (71%) say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population.

Strongly linked to this sentiment, more than two thirds of France's workers (69%) believe broadband should be free.

Meanwhile, not being able to access reliable internet at home during lockdown meant 42% were unable to tap into critical services such as virtual medical appointments.

## Key takeaways



**80%** say access to secure, fast, reliable connection is a necessity



**82%** think the Government should accelerate its plans to ensure high-speed, reliable internet for everyone in France



**74%** agree accessibility of fast and reliable internet is critical to future economic growth



**71%** say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population

82% of French workers say broadband must improve dramatically across the country in order for people to be able to work anywhere.

Nearly four in 10 workers in France (39%) spend seven or more hours online per day, suggesting lines are blurring between personal and work use of the internet at home; 43% of households say three people or more share their home connection throughout the day.

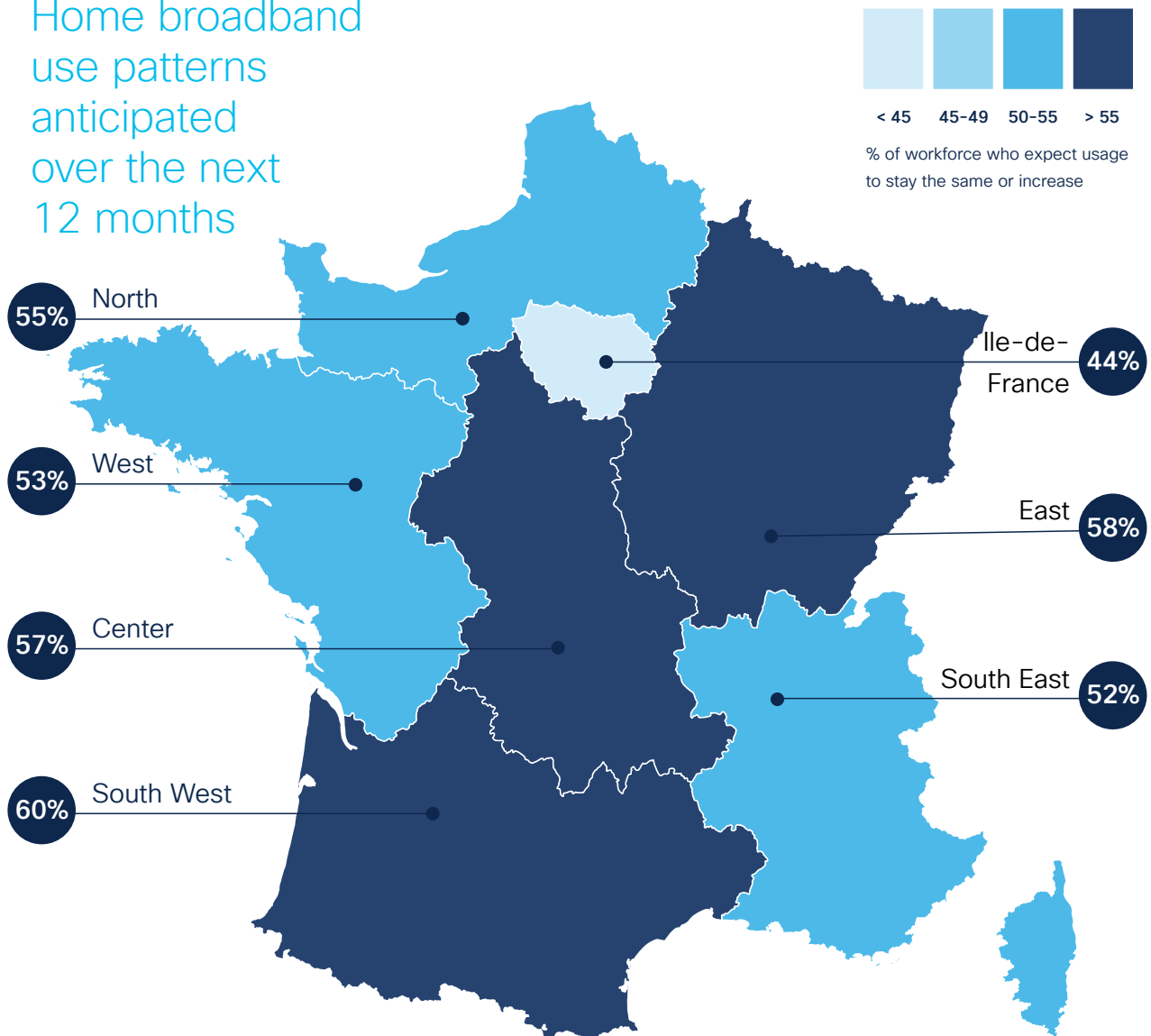
During the next 12 months, more than half (55%) believe their overall internet usage will stay the same or grow. A further 20% expect to use the internet less than they do at present, but suspect their time online will not return to pre-pandemic levels.

## Upgrade urgency

Over half (53%) rate connectivity a critical factor in where they choose to live. Of this figure, 17% say they either moved home recently without realising their new location has poor internet connection, or they have pinpointed where they'd like to move to but know there is no connection available.

Nearly 4 in 10 (38%) hybrid workers, and 28% of those who work remotely full time, claim their home connection is only average or weak meaning they cannot rely on a strong connection. As a result, almost four in 10 (38%) hybrid workers claim they'll upgrade within a year.

## Home broadband use patterns anticipated over the next 12 months





# Spotlight: Germany

The proposed shift to gigabit-capable networks is not quite fast enough in the eyes of the German workforce, who are demanding a more rapid upgrade



Germany's federal Government has set itself a target of installing nationwide gigabit-capable networks by 2025 and has also developed a 5G strategy. The goal is to expand the fibre infrastructure in each region and every community – preferably directly to people's homes.

In April 2021, Parliament voted to support the right to fast internet, with a focus on connectivity in rural/countryside areas. Of course, the success of such an ambitious programme will rely on strong collaboration between Service Providers and German lawmakers.

There's high demand for improved internet access among the population: 75% of Germany's workforce think the Government's action isn't fast enough and are demanding a quicker upgrade.

More than half (52%) also believe government investment in fast, reliable internet is just as important as maintaining other public utilities such as the national water and energy infrastructure.

## Route to growth

A huge 80% say affordability of reliable broadband is set to become a major issue in Germany, while 69% view secure, fast, reliable connection as a necessity.

A majority also think that economic growth must be built on better internet access: 66% state this. A similar proportion (65%) say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population. Strongly linked to this sentiment, nearly two thirds of German's (62%) believe broadband should be free.

## Key takeaways



**69%** say access to secure, fast, reliable connection is a necessity



**75%** think the Government should accelerate its plans to ensure high-speed, reliable internet for everyone in Germany



**66%** agree accessibility of fast and reliable internet is critical to future economic growth



**65%** say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population



The German workforce has a keen eye on the ability of internet services to support changes to their working lives.

70% of respondents say broadband services must improve dramatically across the country in order for people to be able to work anywhere.

More than four in 10 (44%) spend seven or more hours online per day, suggesting lines are blurring between personal and work use of the internet at home; 46% of households say three people or more share their home connect throughout the day.

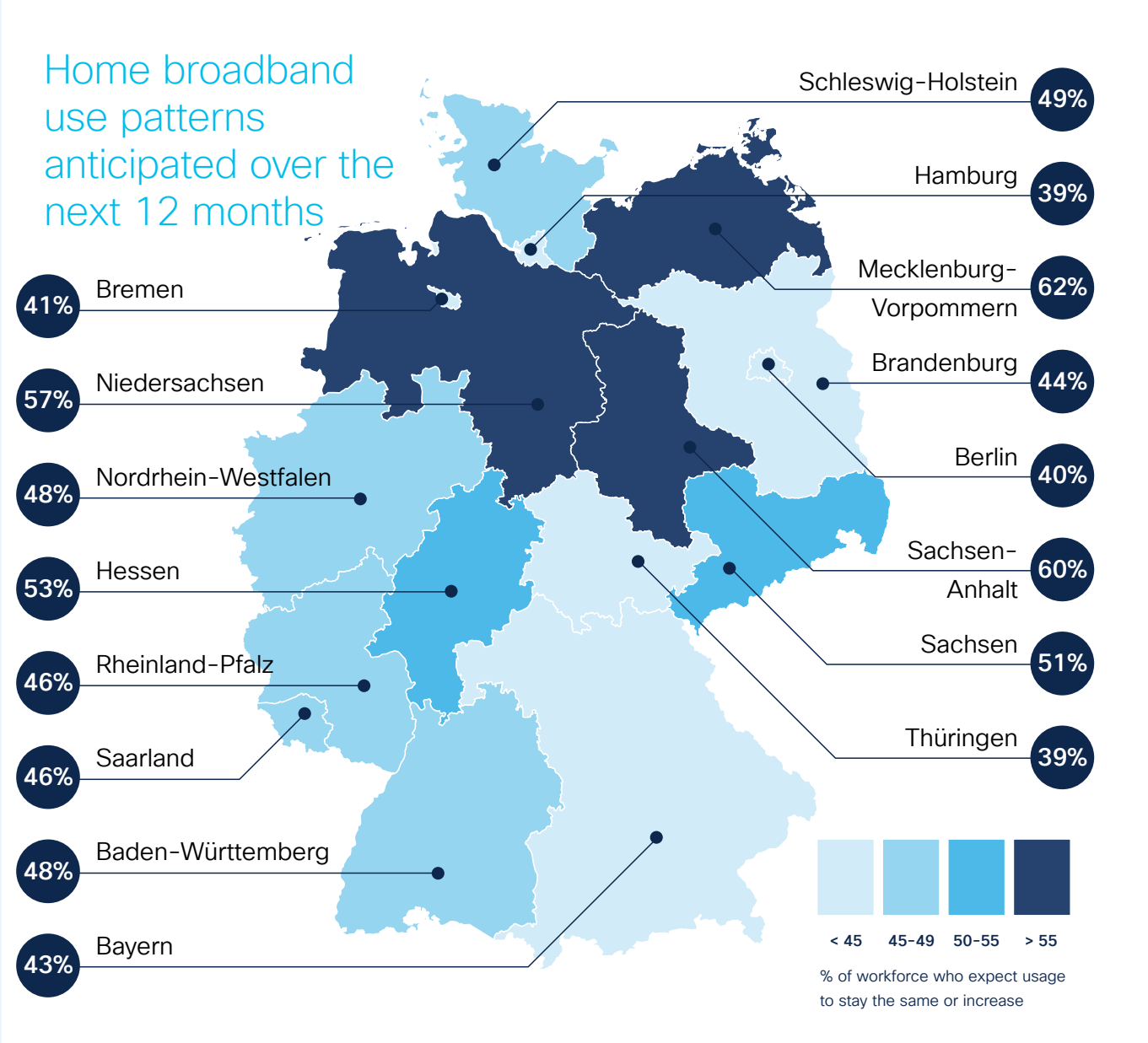
During the next 12 months, 47% believe their overall internet usage will stay the same or

grow. A further 22% expect to use the internet less than they do at present but suspect their time online will not return to pre-pandemic levels.

**New connections**

Almost half (48%) rate connectivity a critical factor in where they choose to live. Of this figure, 18% say they either moved home recently without realising their new location has poor internet connection, or they have pinpointed where they'd like to move to but know there is no connection available.

Nearly 4 in 10 (38%) hybrid workers, and 37% of those who work remotely full time, claim their home connection is only average or weak meaning they cannot rely on a strong connection. As a result, almost three in 10 (29%) hybrid workers claim they'll upgrade within a year.



# Spotlight: Italy

The Italian workforce wants faster progress for better internet connections, with the Government committing billions to a universal upgrade



As part of the Italian Recovery Plan, the Government is prioritising universal provision of ultra-fast broadband for all. Officials aim to spend €6.7bn from the EU Recovery Fund on the programme.

Overall, the Government has committed to spend more than €8bn on broadband, 5G and satellite technologies, desiring superfast connections of 1GB available for all Ital-ians by 2026.

Yet Italian workers need this done faster: 86% think programmes to ensure high-speed and reliable internet for everyone should be accelerated further.

The vast majority (79%) think that economic growth must be built on better internet access. A large proportion of people (72%) also say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population.

## Affordability agenda

90% of Italian workers think affordability of reliable broadband is set to become a major issue in their country, while 81% view secure, fast, reliable connection as a necessity.

Almost three-quarters (74%) state broadband should be provided free of charge. 53% of workers believe investment in fast, reliable internet is just as important as maintaining other public utilities such as the national water and energy infrastructure.

Furthermore, 84% believe broadband must improve dramatically across the country in order for people to be able to work anywhere.

Workers say there have already been consequences born of poor connectivity: not being able to access reliable internet at home during the pandemic meant 44% were unable to access critical services such as virtual medical appointments.

## Key takeaways



**81%** say access to secure, fast, reliable connection is a necessity



**86%** think the Government should accelerate its plans to ensure high-speed, reliable internet for everyone in Italy



**79%** agree accessibility of fast and reliable internet is critical to future economic growth



**72%** say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population



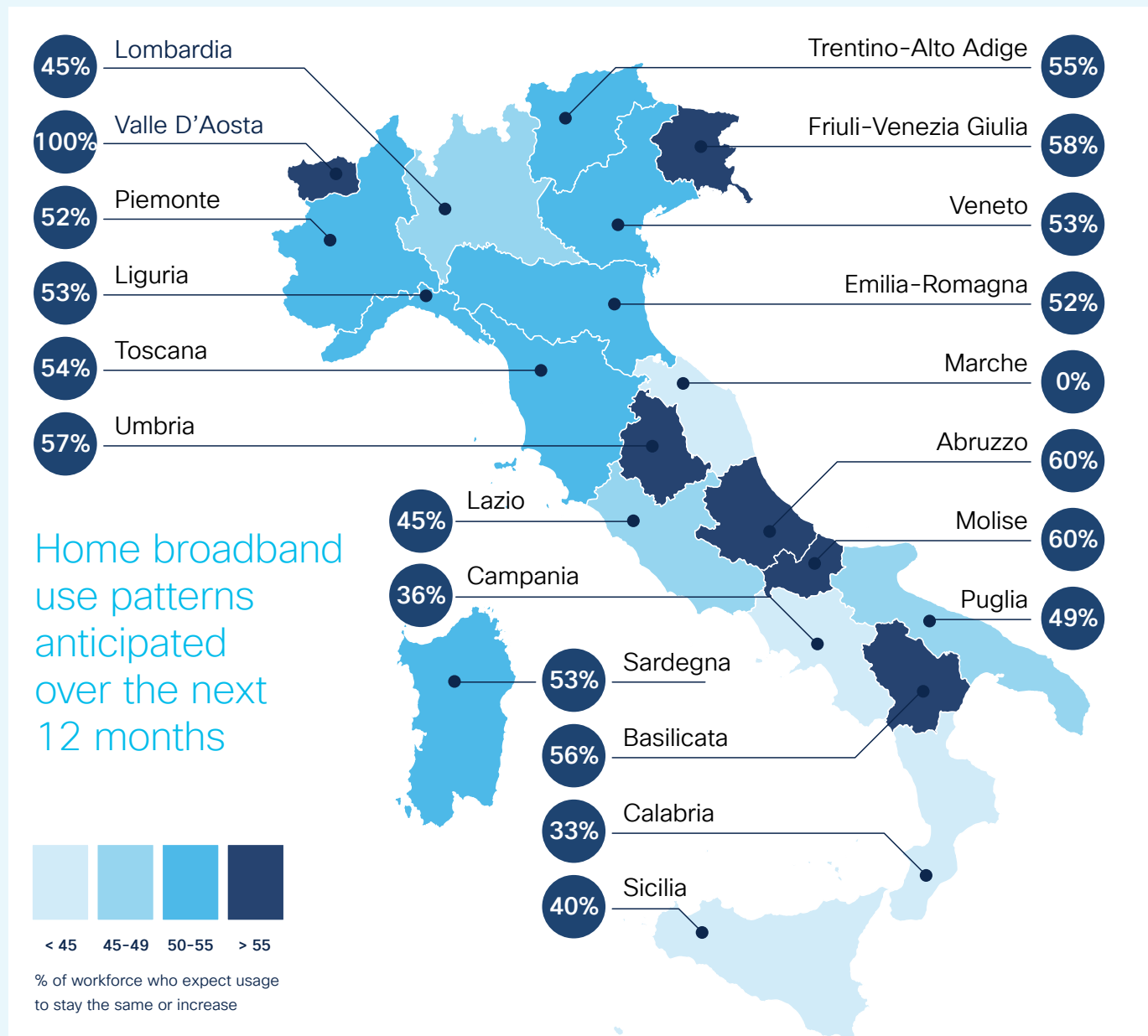
More than four in 10 Italian workers (45%) spend seven or more hours online per day, suggesting lines are blurring between personal and work use of the internet at home; 51% of households say three people or more share their home connection throughout the day.

During the next 12 months, 47% of respondents believe their overall internet usage will stay the same or grow compared to current levels. A further 26% expect to use the internet less than they do at present but suspect their time online will not return to pre-pandemic levels.

## Building connectivity

Nearly half (48%) rate connectivity a critical factor in where they choose to live. Of this figure, more than one in 10 (12%) say they either moved home recently without realising their new location has poor internet connection, or they have pinpointed where they'd like to move to but know there is no connection available.

44% of the hybrid workers polled, and 36% of those who work remotely full time, claim their home connection is only average or weak meaning they cannot rely on a strong connection. As a result, more than four in 10 hybrid workers (44%) state they'll upgrade within a year.



# Spotlight: Russia

The workforce in Russia hold some of the strongest views in Europe about internet access, with a big majority believing it is a necessity



Russian workers are forthright in pushing for better internet services: 86% think it is a necessity, and the same proportion say that plans to provide faster and more reliable connections should be accelerated.

These are some of the most strongly held views across the European markets we surveyed – and there are other areas where workers are keen to comment on efforts to upgrade services.

The vast majority (83%) think that economic growth must be built on better internet access. A similar proportion of people (81%) say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population.

## As vital as water and electricity

Overall, 60% of workers believe investment in fast, reliable internet is just as important as maintaining other public utilities such as the national water and energy infrastructure.

Meanwhile, 41% think affordability of reliable broadband is set to become a major issue in Russia, while 72% say state broadband should be provided free of charge.

Furthermore, 86% believe broadband must improve dramatically across the country in order for people to be able to work anywhere.

## Key takeaways



**86%** say access to secure, fast, reliable connection is a necessity



**86%** think that plans to ensure high-speed, reliable internet for everyone in Russia should be accelerated



**83%** agree accessibility of fast and reliable internet is critical to future economic growth



**81%** say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population



Nearly half of Russian workers (48%) spend seven or more hours online per day, suggesting lines are blurring between personal and work use of the internet at home; 51% of households say three people or more share their home connection throughout the day.

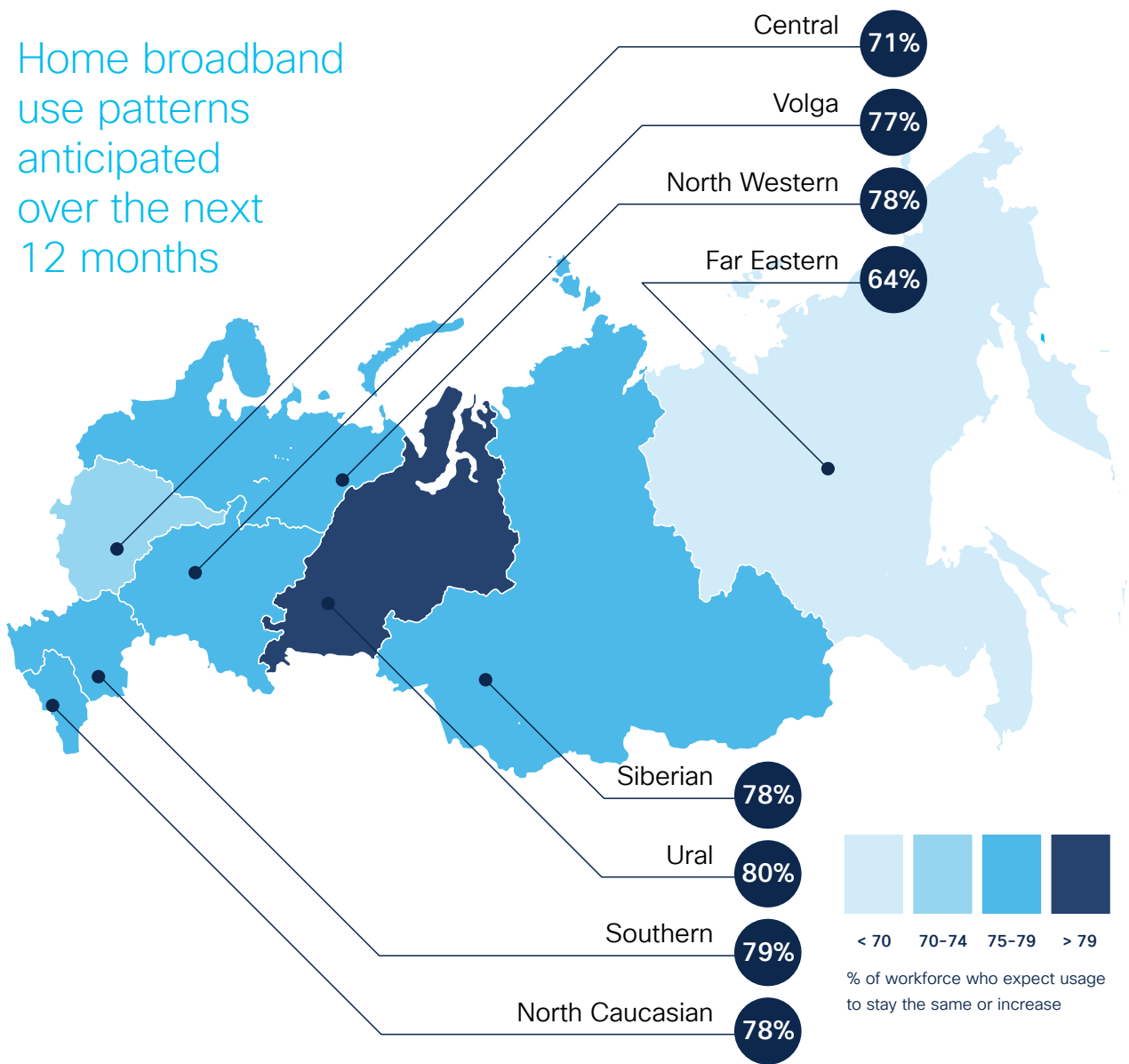
During the next 12 months, three quarters of respondents believe their overall internet usage will stay the same or grow compared to current levels. A further 12% expect to use the internet less than they do at present, but suspect their time online will not return to pre-pandemic levels.

### Access everywhere

Over four in 10 (42%) rate connectivity a critical factor in where they choose to live. Of this figure, almost one in 10 (9%) say they either moved home recently without realising their new location has poor internet connection, or they have pinpointed where they'd like to move to but know there is no connection available.

More than half of the hybrid workers polled (51%), and 44% of those who work remotely full time, claim their home connection is only average or weak meaning they cannot rely on a strong connection. As a result, almost a third of hybrid workers (32%) state they'll upgrade within a year.

### Home broadband use patterns anticipated over the next 12 months



# Spotlight: Poland

Big plans are afoot from Government and Service Providers to propel better broadband – but Poland’s workforce want a faster roll-out



Poland aims to expand fibre-to-the-home network coverage to 100% by 2022. The Government’s state broadband fund will continue to subsidise roll-out in rural areas where it is not economically viable for Service Providers to do so; their collaboration speaks to how seriously industry and ministers take the connectivity challenge.

The Polish Government has requested €23.9bn in grants from the EU Recovery Fund, with a view to dedicating €1.4bn to the network and improving broadband access.

There’s high demand for improved internet among the population: 83% of Poland-based workers think the Government’s action isn’t fast enough and are demanding a quicker upgrade.

More than half (53%) also believe government investment in fast, reliable internet is just as

important as maintaining other public utilities such as the national water and energy infrastructure.

## Right to reliable access

A huge 79% say affordability of reliable broadband is set to become a major issue in Poland, while 80% view secure, fast, reliable connection as a necessity.

A big majority also think that economic growth must be built on better internet access: 78% of workers state this. Almost three quarters (74%) say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population.

Strongly linked to this sentiment, more than two thirds of Poland’s workers (69%) believe broadband should be free.

## Key takeaways



**80%** say access to secure, fast, reliable connection is a necessity



**83%** think the Government should accelerate its plans to ensure high-speed, reliable internet for everyone in Poland



**78%** agree accessibility of fast and reliable internet is critical to future economic growth



**74%** say having access to fast and reliable internet is critical to developing and maintaining a well-educated and informed population



80% of respondents say broadband services must improve dramatically across the country in order for people to be able to work anywhere.

Nearly half of Polish workers (47%) spend seven or more hours online per day, suggesting lines are blurring between personal and work use of the internet at home; 55% of households say three people or more share their home connect throughout the day.

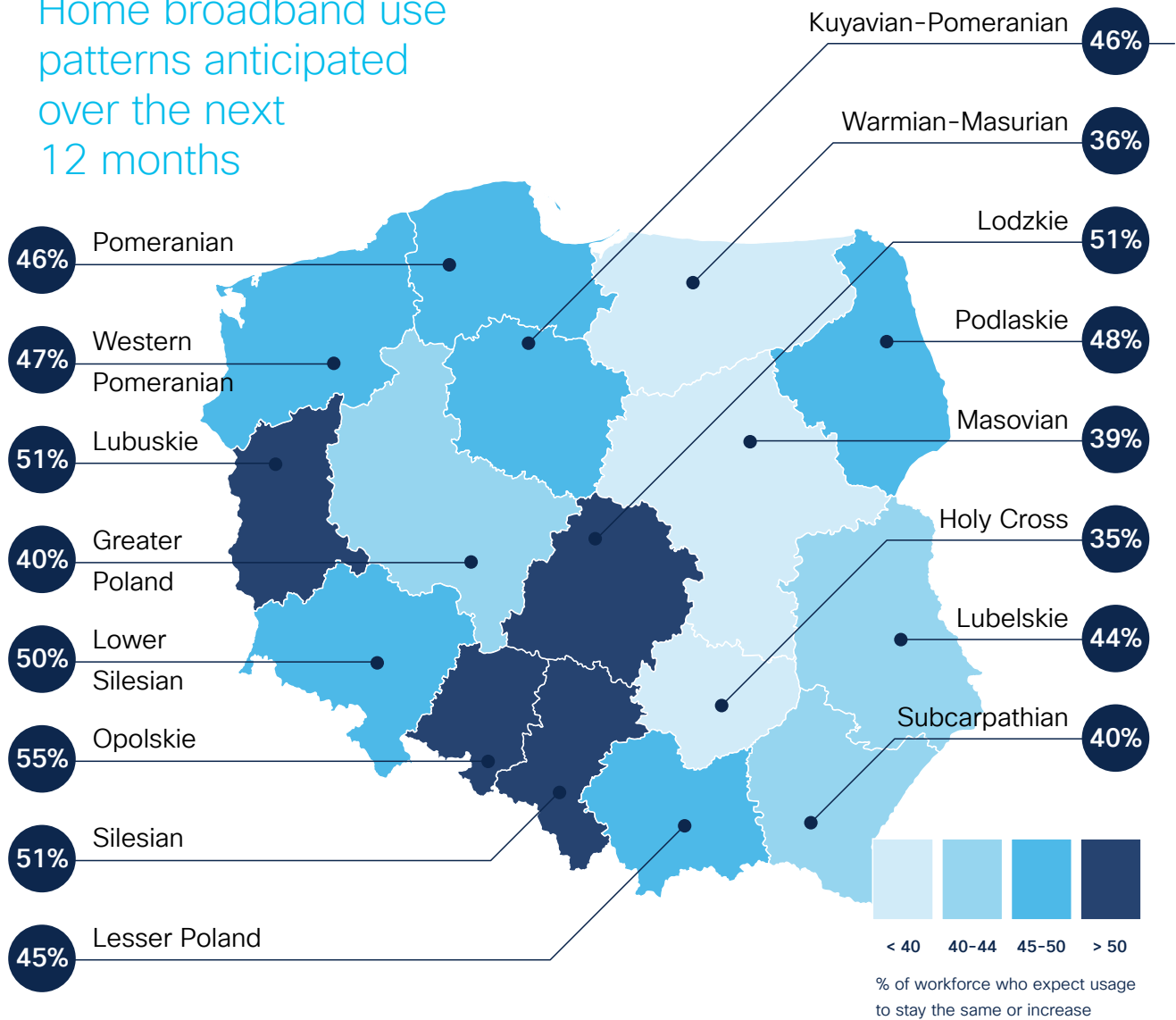
During the next 12 months, 45% believe their overall internet usage will stay the same or grow. A further 26% expect to use the internet less than they do at present, but suspect their time online will not return to pre-pandemic levels.

### Connectivity comes home

Exactly half of workers rate connectivity a critical factor in where they choose to live. Of this figure, 16% say they either moved home recently without realising their new location has poor internet connection, or they have pinpointed where they'd like to move to but know there is no connection available.

Nearly 4 in 10 (37%) hybrid workers, and 35% of those who work remotely full time, claim their home connection is only average or weak meaning they cannot rely on a strong connection. As a result, more than four in 10 (43%) hybrid workers claim they'll upgrade within a year.

### Home broadband use patterns anticipated over the next 12 months



# Methodology

Cisco Broadband Index is based on a survey of 13,617 workers in the UK, Germany, France, Italy, Poland and Russia. It was completed in May 2021.

The sample included respondents based in every region of each country, who either work full-time remotely; full-time in an office; hybrid, between home and the office; or on the frontline.

The poll was conducted by independent research consultancy Censuswide, who abide by and employ members of the Market Research Society - which is based on the ESOMAR principles.

## Supporting Resources:

**Cisco Cloud Native Broadband Network Gateway**

**Cisco Routed Optical Networking**

**Cisco 5G Network Architecture**

**The Cisco Converged SDN Transport architecture**

**Cisco Crosswork Network Automation**