



December 2013

# Small Business Employee Survey

## INTRODUCTION

Technology has changed the way we communicate, socialize and do business. Every day, millions of employees in the US use some form of technology as part of their daily work and personal activities, contributing to the growth and success of the companies that they work for.

Many surveys that focus on small and medium businesses (SMBs) often do not take into account what employees feel, do or have to say about their job or the company they work for. The respondents are either owners and senior executives or IT admins who provide excellent insight into the challenges and problems facing small businesses on a daily basis.

However, it would also be interesting to understand what their employees are going through, how satisfied they are at work, what is troubling them, how they use social media, how they connect to their company networks, how they feel about their management teams, their confidence in protection from cybercrime, and much more.

To this end, GFI Software commissioned a scientific study that provides a profile of the American small business employee and looks at their opinions on a number of pertinent issues affecting not only their lives but also the businesses they work for.

*“GFI Software commissioned a scientific study that provides a profile of the American small business employee and looks at their opinions on a number of pertinent issues”*

## METHODOLOGY

This survey was sponsored by GFI Software Inc. and conducted online by the GfK Group (formerly Knowledge Networks) using sample from the probability-based KnowledgePanel®, which is designed to be representative of all adults in the United States. The survey was conducted September 28 to October 7, 2013, with screening that yielded 1,119 U.S. adults who work full-time at firms with 2-99 employees and who use a desktop or laptop computer at work. Mike Mokrzycki of Mokrzycki Survey Research Services produced the survey for GFI.

KnowledgePanel members are recruited using address-based sampling (ABS), a probability-based selection of addresses from the U.S. Postal Service's Delivery Sequence File. ABS is estimated to cover 97 percent of U.S. households, including more than a third that today have only cell phones, according to federal government surveys. Individuals at randomly sampled addresses are invited to join KnowledgePanel through a series of mailings, with follow-up telephone calls in some cases. A small number of current KnowledgePanel members were recruited using the random-digit-dial (RDD) sampling technique before Knowledge Networks turned to ABS on a large scale in 2009. KnowledgePanel members who do not have their own Internet access – 30 of the 1,119 respondents in this survey – are provided with it and a netbook computer if needed.

Respondents randomly selected from KnowledgePanel received an email notification to take this survey. Automatic email reminders were sent to non-respondent panel members after three days, with automated phone calls following several days thereafter if necessary. GfK operates a modest incentive program to encourage participation and create member loyalty.

### **Sample design:**

Probability-based online sample, from national panel recruited almost entirely using address-based sampling (ABS)

### **Study population:**

1,119 U.S. adults who work full-time at firms with 2-99 employees and who use a desktop or laptop computer at work

### **Field dates:**

Sept. 28-Oct. 7, 2013

### **Sampling error:**

+/- 4.2 percentage points for the full sample, factoring in design of the sample; higher or subgroups

Results were statistically adjusted, or weighted, in multiple stages so that KnowledgePanel as a whole matches known population benchmarks for the U.S. population and to reconcile differences between the sample for this study and all KnowledgePanel members who meet the same employment criteria. Weighting variables were gender, age, race, education, household income, Census region and whether or not the respondent lives in a metropolitan area. Additionally, a minor adjustment was made to the distribution of respondents by enterprise employment size, using targets derived from the U.S. Census Bureau’s Statistics of U.S. Businesses.

The margin of sampling error for survey estimates from the full sample is plus or minus 4.2 percentage points, factoring in effects from the design of the sample. Sampling error is higher for subgroups. While sampling error can be quantified statistically in a probability-based survey, as with any survey this study is subject to other, non-quantifiable sources of error, such as from question wording and order.

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|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Data collection/<br/>tabulation:</b><br>GfK Group, formerly<br>Knowledge Networks,<br>sampling from<br>probability-based<br>KnowledgePanel®,<br>which is designed to be<br>representative of<br>all U.S. adults |
| <b>Survey sponsor:</b><br>GFI Software Inc.<br>( <a href="http://www.gfi.com">http://www.gfi.com</a> )                                                                                                             |
| <b>Survey producer:</b><br>Mokrzycki Survey<br>Research Services<br>( <a href="http://mjmsurvey.com">http://mjmsurvey.com</a> )                                                                                    |
| Additional details about<br>the methodology of this<br>survey are available<br>for download                                                                                                                        |

## KEY FINDINGS

- Nearly 6 in 10 respondents (59 percent) said that if they could snap their fingers and remove from the Internet all information that someone could find about them personally, they would.
- 87 percent of respondents admitted they feel at least a little risk of becoming the victim of identity theft or another crime while using work computer systems. This number includes 6 percent who see “a great deal” of risk and 37 percent who perceive “some” risk.
- 75 percent of small business employees surveyed said mobile computing has improved their lives because they can work from anywhere, as opposed to 25 percent who said it has made life more stressful because it’s harder to escape work.
- 33 percent of respondents said they use social networks for personal reasons while they are working; 18 percent of these respondents admitted it makes them less productive.
- Nearly all respondents with employer-owned mobile computing devices said they use them for things not related to work; 22 percent said they do so often, 38 percent sometimes and 30 percent rarely.
- 37 percent of small business employees surveyed said they use Facebook at least daily.
- Among workers at small businesses that have IT support on staff or on contract, only 53 percent said their company has written policies governing work computer use, and 24 percent who do admitted having violated those policies.

*“75 percent of small business employees surveyed said mobile computing has improved their lives because they can work from anywhere”*



- 81 percent of respondents indicated that they are satisfied with their job overall, compared with only 68 percent of all full-time US employees surveyed in a Rutgers University Heidrich Center for Workforce Development study of January 2013.
- Asked to grade the management team where they work, More than half gave an A (22 percent) or B (38 percent), 27 percent said C, 10 percent gave a D and 3 percent flunked their management. The average grade came out to a B-minus.
- 43 percent of small business employees have connected to their work networks remotely using a mobile computing device.
- 7 percent acknowledge they have at some point lost a mobile computing device that contained company data.
- Only 36 percent of respondents said their employer's computers are set up to block them from visiting certain websites.

*“43 percent of small business employees have connected to their work networks remotely using a mobile computing device”*

## ANALYSIS

The survey of employees in small to medium businesses in the US highlights a number of interesting facts about their attitudes towards work and their use of technology and, of equal importance, their views of technology within a working environment.

While the majority of employees believe that mobile computing has improved their lives because they can work from anywhere, they are also concerned about privacy and data protection. Six in 10 respondents would remove all their personal information from the Internet at the snap of a finger, if they could; and 87 percent admit they feel at least a little risk of becoming the victim of identity theft or another crime while using work computer systems.

Employees in small and medium businesses in the US (81 percent) are also satisfied with their job overall. This percentage is higher than the 68 percent of all full-time US employees surveyed in a Rutgers University Heidrich Center for Workforce Development study of January 2013.

Employees' views on the management team in the business they work may also indicate the importance of good management. Six in 10 gave their management team an A or B, with only 3 percent giving a failing grade to their bosses.

Overall, the GFI survey pictures a workforce in small businesses to be happy, confident with technology and displaying attitudes towards technology that reflect a broad acceptance of mobility and dependency on it to do their job.

*“Six in 10 respondents would remove all their personal information from the Internet at the snap of a finger, if they could”*

*“Six in 10 gave their management team an A or B, with only 3 percent giving a failing grade to their bosses”*

## PROFILE OF SMALL-BUSINESS WORKERS

One in five respondents reported that they work at least 50 hours a week.

- A quarter of respondents (25 percent) in our sample work for firms with fewer than 10 employees (but sole proprietors were excluded); 23 percent are in firms with 10 to 19 employees, 12 percent are in the 20-29 employee category, 16 percent are in firms with 30-49 employees and the remaining 23 percent work for companies with 50 to 99 employees.
- On average, respondents to the GFI survey reported working 44 hours a week at their main job. The median was 40 hours. About one in five (19 percent) reported working at least 50 hours a week, including 6 percent who work 60 or more hours.

*“On average, respondents to the GFI survey reported working 44 hours a week at their main job.”*

## JOB SATISFACTION

Full-time, computer-using small-business employees in the GFI survey expressed significantly more job satisfaction in general and on several specific aspects of their jobs than did American workers overall in a separate survey conducted earlier this year.

- 81 percent said they were satisfied with their job overall, compared to 68 percent of all full-time U.S. workers surveyed by Rutgers University’s Heidrich Center for Workforce Development in January 2013 (also conducted online via Knowledge Networks).

*“About one in five (19 percent) reported working at least 50 hours a week, including 6 percent who work 60 or more hours”*



- Small-business workers also were significantly more likely than the overall full-time workforce to say they were satisfied with their job security (62 percent vs 51 percent), opportunities for advancement (46 percent vs. 35 percent) and the age at which they'll probably retire (40 percent vs. 31 percent).
- Small-business employees and American workers overall expressed about the same level of satisfaction with their overall annual income (52 percent in GFI, 50 percent in the Rutgers poll) and health and medical coverage provided by their employer (47 percent GFI, 46 percent Rutgers).
- A total of 17 percent of GFI survey respondents expressed satisfaction with their job overall and with all six of the individual job aspects tested.
- Women were more likely than men to be dissatisfied with their job overall and on particular facets of work: advancement opportunities, total annual income and their likely retirement age.
- Managers were more satisfied than non-managers with total annual income and advancement opportunities, but there were no significant differences between these groups on other satisfaction measures including on their jobs overall.
- Perhaps not surprisingly, respondents with greater educational attainment were more apt than those with less education to be satisfied with their income, health and medical coverage and job security. But there was no difference by education in overall job satisfaction.

*“A total of 17 percent expressed satisfaction with their job overall and with all six of the individual job aspects tested.”*

- Also not surprisingly, the higher the respondent's total annual household income, the more likely they were to express satisfaction with their jobs overall and all six work-related aspects tested in this survey. In fact there was a big jump in satisfaction across all the items from the \$100,000-\$150,000 category (19 percent) to those making more than \$150,000 (34 percent). At the other extreme, only 10 percent of small-business workers with less than \$50,000 total income expressed satisfaction across the board, as did 18 percent of those in the \$50,000-\$100,000 bracket.

## JOB SECURITY

Small-business employees also were less likely than the broader population to fear being laid off. 11 percent said that was very or fairly likely in the next 12 months, compared to 18 percent of American adults in an April 2013 Gallup poll.

## GRADING MANAGEMENT

Asked to grade the management team where they work, more than half gave an A or B while 10 percent gave a D and 3 percent flunked their management. **The average grade came out to B minus.** Respondents who managed other people at work – 48 percent of respondents – were a slightly more likely to view their management colleagues favorably, giving them an average grade of a B, but they weren't wholly uncritical – 8 percent gave the management team a D and 2 percent a failing grade.

*“Respondents who have ever worked remotely from home score their management teams more highly than workers who have never worked remotely”*

- Respondents who have ever worked remotely from home score their management teams more highly than workers who have never worked remotely.

## WORKING REMOTELY

The survey found 57 percent of computer-using small-business employees have at some point worked remotely, including 47 percent who have connected to work using mobile computing devices.

- In all, 32 percent have worked full days from home, including 7 percent who do so “often,” 9 percent “sometimes” and 15 percent “rarely.”
- Half (50 percent) work from home outside of regular working hours - such as at night or on weekends - at least rarely, including 20 percent who do so “sometimes” and 13 percent “often.”
- Nearly as many work remotely at least rarely while on days off for holidays (43 percent) or while on vacation (38 percent).
- Those who have worked remotely at some point are more likely to be men and have higher income and educational attainment. There were no significant differences in remote work experience by the size of the respondent’s company, though.
- Those who have worked remotely are more likely than those who haven’t to report satisfaction with their total annual income and advancement opportunities. But there were no significant differences on other job satisfaction measures, including family/work balance.
- Respondents who have ever worked remotely are far more likely to report longer work weeks: 26 percent say they work 50 or more hours a week, compared to 10 percent of those who have never worked remotely. Those who do at least some work from home also registered higher job satisfaction than those who don’t on several measures, including the ability to balance work and family.

*“Respondents who have ever worked remotely are far more likely to report longer work weeks: 26 percent say they work 50 or more hours a week, compared to 10 percent of those who have never worked remotely”*

Among those who work full days from home “often” or “sometimes,” 31 percent said they do so one day in a typical week; 20 percent said two days; 13 percent said three or four days; 18 percent said five days; and 8 percent said they work full days from home six or seven days in a typical week.

Respondents at the smallest companies – with fewer than 10 employees – are a bit more likely to work full days from home, at least rarely (39 percent do) than are those who work for larger firms (30 percent).

In all, 43 percent of all respondents have used a mobile computing device to connect remotely to a work network, and a large majority are happy for the opportunity to do so: Asked to choose which statement comes closer to their view, 75 percent said “Mobile computing has improved my life because I can work from anywhere” while the remaining 25 percent said “Mobile computing has made my life more stressful because it’s harder to escape work.”

Small-business workers who have ever worked remotely are most likely to connect using laptops (52 percent say they do so often; just 13 percent say they never use a laptop) and smartphones (51 percent often, just 16 percent never). Use of iPads or other tablets is a little less widespread – 35 percent connect to work with those devices often and 25 percent say they have never used a tablet to connect to work.

*“Respondents at the smallest companies – with fewer than 10 employees – are a bit more likely to work full days from home, at least rarely (39 percent do) than are those who work for larger firms (30 percent)”*

Small-business workers who do remote work are apt to use devices they own:

- Of those who connect to work networks using laptops, 49 percent say they own the laptop, 41 percent say their employer issued the laptop and 10 percent say they use both their own and employer-issued laptops
- Of those who connect using smartphones, 75 percent own the device; just 19 percent only use an employer-issued smartphone and 5 percent use both.
- Of those who use iPads or other tablets to connect to work, 70 percent use their own devices, 21 percent use employer-issued tablets and 8 percent use both.

Seven percent acknowledge they have at some point lost a mobile computing device – their own, or company-issued – that contained company data.

## SOCIAL NETWORKING:

As with the population overall, Facebook use is widespread among small-business workers - 37 percent use it at least daily and 12 percent use it “not daily, but regularly.” Another 26 percent use it occasionally or rarely; 25 percent say they’ve never used Facebook.

- 48 percent of managers say they are Facebook “friends” with employees they supervise, but just 29 percent of non-managers say they’re “friends” with any of their managers.

*“Of those who connect to work networks using laptops, 49 percent say they own the laptop, 41 percent say their employer issued the laptop and 10 percent say they use both their own and employer-issued laptops”*

*“Of those who use iPads or other tablets to connect to work, 70 percent use their own devices, 21 percent use employer-issued tablets and 8 percent use both”*

- Other social networking services were far less popular; only YouTube is used by majority of respondents to this survey.
  - In all, 64 percent say they use some kind of social network service regularly, including 42 percent who do so at least daily. At the other extreme, 8 percent say they have never used any of the 10 types of social networks listed in the survey.
- **A third (33 percent) say they use social networks for personal reasons while they are working; among them, 72 percent says it has no effect on their productivity but 18 percent acknowledge it makes them at least a little less productive.** Managers are about as likely as non-managers to engage in this behavior and acknowledge that it impinges on their productivity.

*“A third (33 percent) say they use social networks for personal reasons while they are working; among them”*

## PERSONAL USE OF WORK COMPUTERS

In a broader measure not limited to social networking but also including things like personal email and shopping online, **only 9 percent of those who have employer-owned mobile computing devices said they never use them for things not related to work;** 22 percent said they do so often, and 38 percent “sometimes” and 30 percent “rarely.”

## IT SERVICES AND POLICIES

More than three in four respondents report there is information technology support where they work. A quarter (26 percent) said there’s a full-time IT manager on their company’s staff; 21 percent said someone on staff handles IT part-time, 30 percent said the business has hired outside help to handle IT and 22 percent said there is no designated IT support where they work.



The larger the firm, the more likely there was full-time IT support.

- Among workers at small businesses with IT support, 53 percent said their company has written policies on acceptable use of work computers - and **24 percent of them said they had knowingly violated those policies at some point.**
- Thirty-six percent of respondents said their employer's computers are set up to block them from visiting certain websites from work.
- Twelve percent consider themselves expert computer users; 41 percent describe themselves as advanced; 40 percent say they have intermediate-level computer skills and 6 percent call themselves novices.
  - Those who work full days from home at least rarely if not more often are much more likely to consider themselves expert or advanced computer users (69 percent) than those who never do (47 percent).
- Those who have IT support at work tend to use it pretty infrequently: 16 percent say they ask for IT help at least weekly, 27 percent say they do so less than weekly but at least once a month, and 57 percent say they seek tech help less often than that or never.
- **Close to half (45 percent) say that to their knowledge, there are both wired and wireless networks where they work;** 22 percent say there's only a wired network, 18 percent say there's only a wireless network and 4 percent say there's no computer network at all.

*“Among workers at small businesses with IT support, 53 percent said their company has written policies on acceptable use of work computers”*

*“Twelve percent consider themselves expert computer users; 41 percent describe themselves as advanced”*

## PRIVACY AND CYBERCRIME

The survey found considerable concern about online privacy and cybercrime:

- Half the sample was asked “If you could snap your fingers and remove from the Internet all information that someone could find out about you personally, would you?” and a whopping six in 10 (59 percent) said yes. The other respondents were asked if there is any information on a social networking site that they wish could be removed, and while just 8 percent said yes, another 30 percent said they didn’t know if there is or there isn’t.
- Asked how much risk they perceive that they could personally become the victim of identity theft or other crime while using work computer systems, only 13 percent said “none at all” - 6 percent said “a great deal,” 37 percent said “some” and 44 percent said “not much.”
  - Small-business employees who ever work full days from home were significantly more likely to see a great deal or some risk of this – 51 percent vs 39 percent who never work full days from home.

*“Asked how much risk they perceive that they could personally become the victim of identity theft or other crime while using work computer systems, only 13 percent said “none at all””*



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