Cisco Connected Government Study

A Survey of Federal, State and Local Government IT Decision Makers

October 2013

SURVEY INFORMATION AND METHODOLOGY

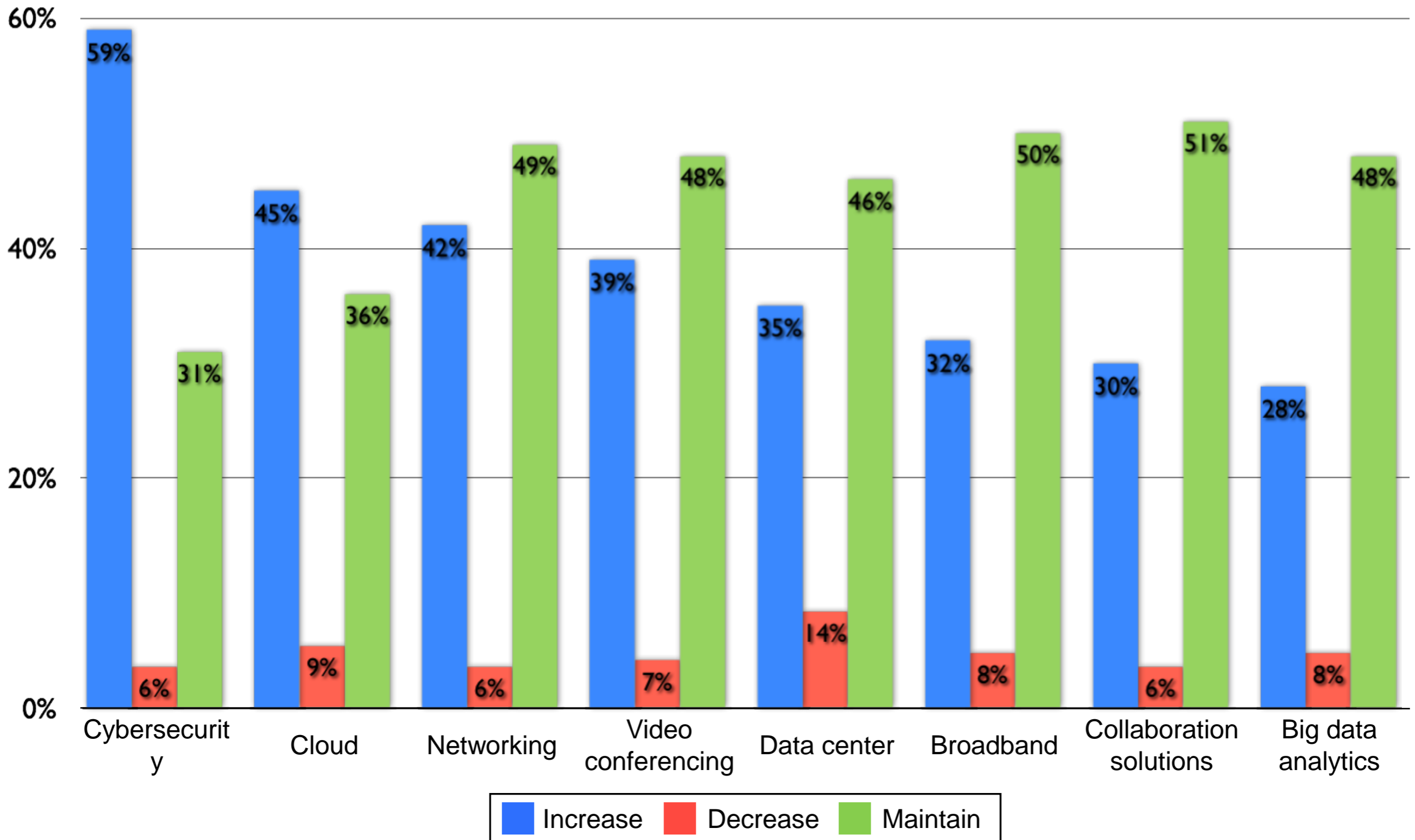|	
Date Conducted	September 3-13, 2013
Sample Size	N = 400
Sample Universe	Public Sector IT Decision Makers and Influencers
Methodology	Telephone and Online Interviewing
Rounding	Columns do not always add up to 100% because of rounding
Conducted by	CLARUS RESEARCH GROUP
Analysis	Ronald A. Faucheux, Ph.D., President and Chief Analyst Michael Hutshneker, MPS Analyst

Most Important Technology Goal

Which ONE of the following would you say is your organization's or agency's most important technology goal in the coming year — would you say it is … improving delivery of services, boosting efficiency, reducing costs, enhancing mobility, or improving security?

	All
Reducing costs	28%
Improving security	22
Boosting efficiency	19
Improving delivery of services	18
Enhancing mobility	9
Don't know (volunteered)	3

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Investments Over the Next Year

Greatest Threat to IT Infrastructure

Which one of the following would you say is the greatest threat to your organization's IT infrastructure — budget constraints, cyber attacks, limited network bandwidth, increased demand for constituent services … or … employee personal devices on the network?

	All
Budget constraints	35%
Cyber attacks	17
Employee personal devices on the network	9
Increased demand for constituent services	8
Limited network bandwidth	6
All (volunteered)	22
None (volunteered)	1
Don't know (volunteered)	2

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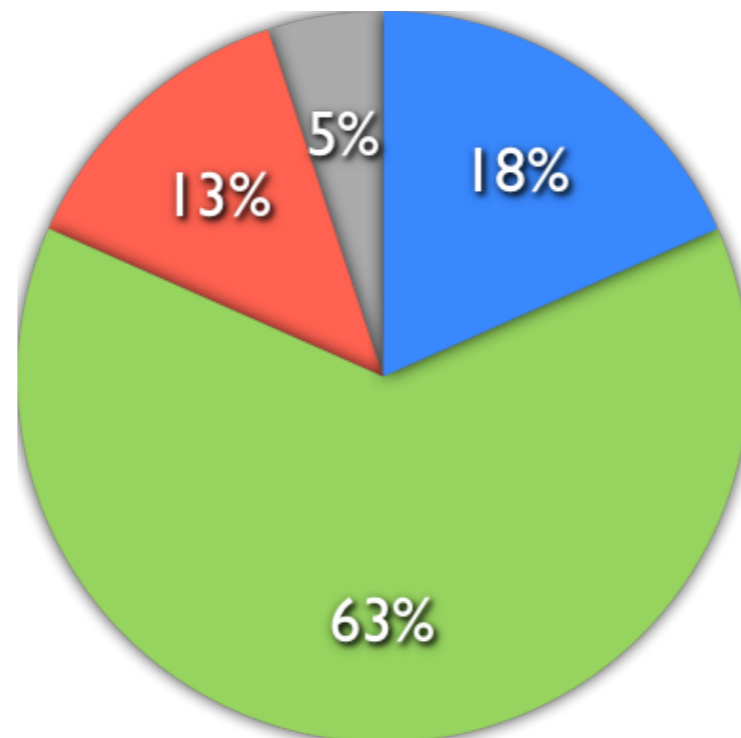
Strengthening the Nation's Cybersecurity

If you had to choose ONE, which of the following would you say is the most effective way to strengthen the nation's cybersecurity — better technology, better employee training … or … better enforcement of policies?

	All
Better technology	21%
Better enforcement of policies	18
Better employee training	15
All (volunteered)	42
None (volunteered)	1
Don't know (volunteered)	3

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Confidence in the Reliability of Cloud Computing

Would you say you have great confidence, some confidence or no confidence in the RELIABILITY of cloud computing?

	All
Great confidence	18%
Some confidence	63
No confidence	13
Don't know (volunteered)	5

- Great confidence
- Some confidence
- No confidence
- Don't know

18%
5%
13%
63%

Confidence in the Security of Cloud Computing

Would you say you have great confidence, some confidence or no confidence in the SECURITY of cloud computing?

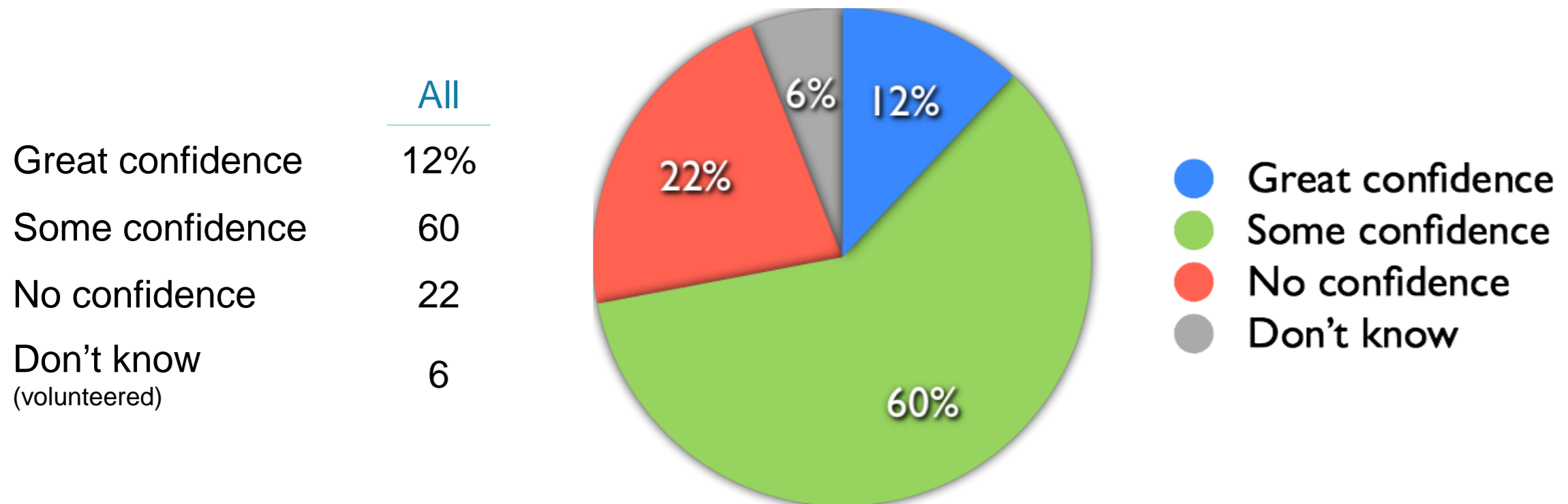|	All
Great confidence	12%
Some confidence	60
No confidence	22
Don't know (volunteered)	6

Legend:
- Great confidence
- Some confidence
- No confidence
- Don't know

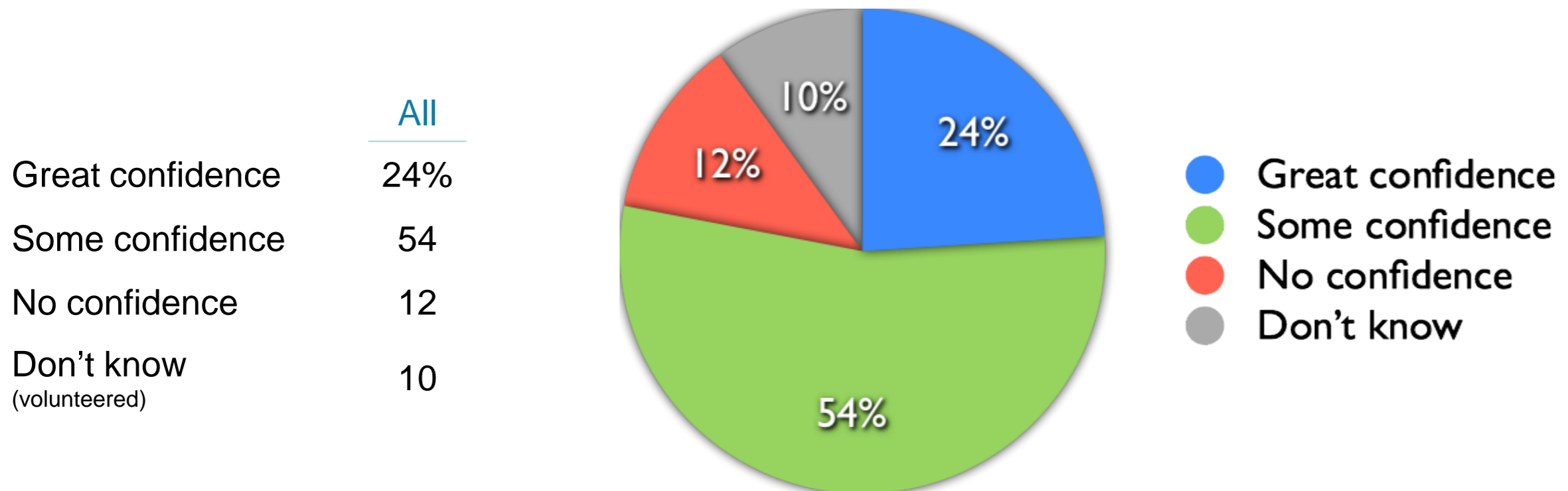*Cisco Connected Government Study – Oct 2013*

Confidence in the Cost Effectiveness of Cloud Computing

Would you say you have great confidence, some confidence or no confidence in the COST EFFECTIVENESS of cloud computing?

	All
Great confidence	24%
Some confidence	54
No confidence	12
Don't know (volunteered)	10

Legend:
- Great confidence — 24%
- Some confidence — 54%
- No confidence — 12%
- Don't know — 10%

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Software Defined Networking

Are you very familiar, somewhat familiar or not familiar with something called "Software Defined Networking" or SDN?

	All
Very familiar	19%
Somewhat familiar	46
Not familiar	33

Asked only of those familiar with "Software Defined Networking": Do you expect SDN to become a viable solution within the next year, sometime in the next few years, sometime in the distant future … or … never?

	All
Within the next year	13%
Sometime in the next few years	58
Sometime in the distant future	21
Never	2
Don't know (volunteered)	6

Internet of Everything

Would you say that you are very familiar, somewhat familiar or not familiar with the concept known as the "Internet of Everything," which is also called the "Internet of Things"?

	All
Very familiar	15%
Somewhat familiar	42
Not familiar	41

Asked only of those familiar with the "Internet of Everything" and/or "Internet of Things": What do you think would be the greatest benefit of the "Internet of Everything," also called the "Internet of Things," for your organization… would you say it would be to streamline processes, enable new services, reduce costs … or … would it have no benefit for your organization?
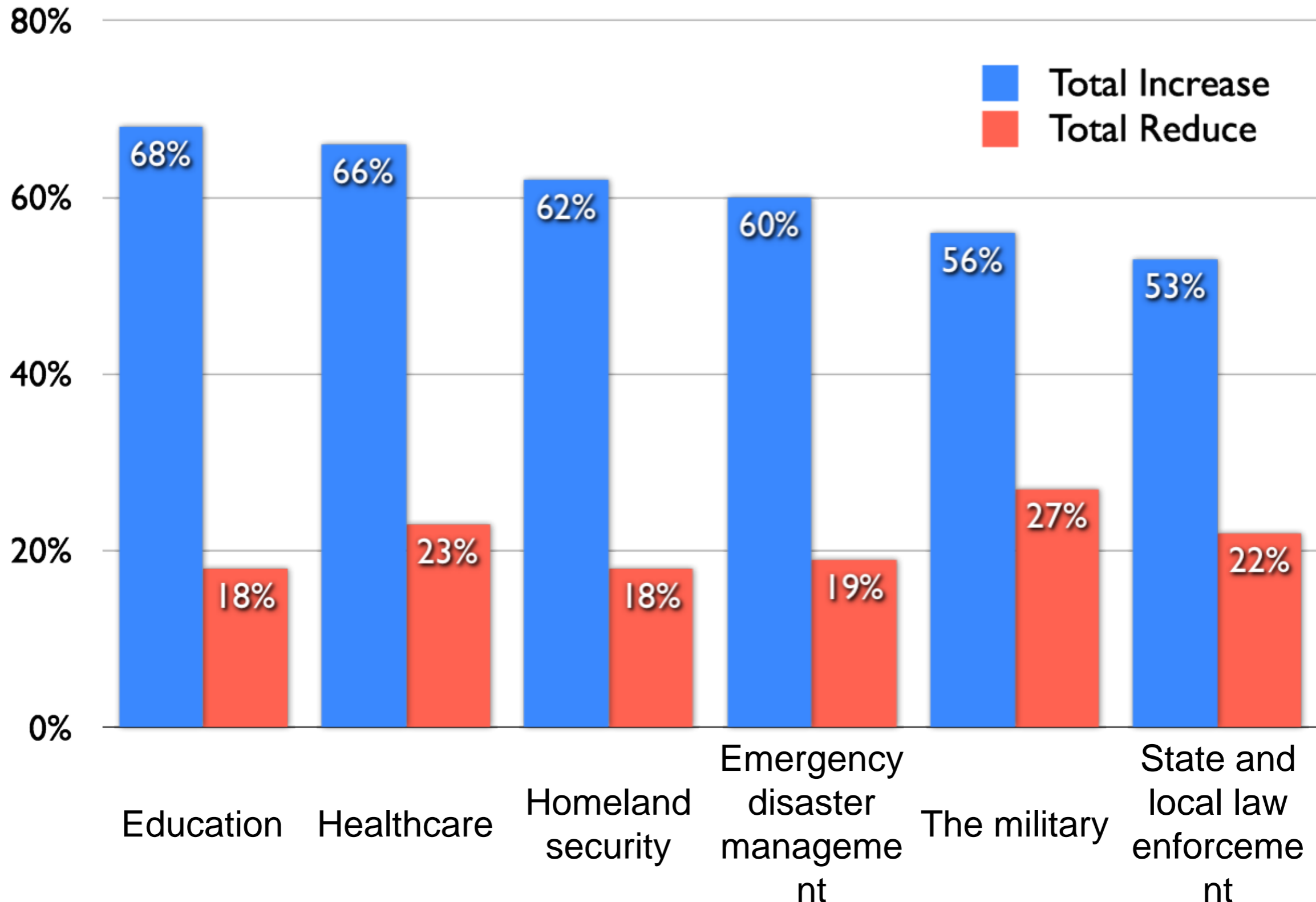
	All
Enable new services	34%
Streamline processes	29
Reduce costs	22
Have no benefit for my organization	9
Don't know (volunteered)	5

U.S. Deployment of Broadband

When it comes to the deployment of broadband, do you think the United States is running ahead of other developed countries, is falling behind other developed countries … or … is about even with other developed countries?
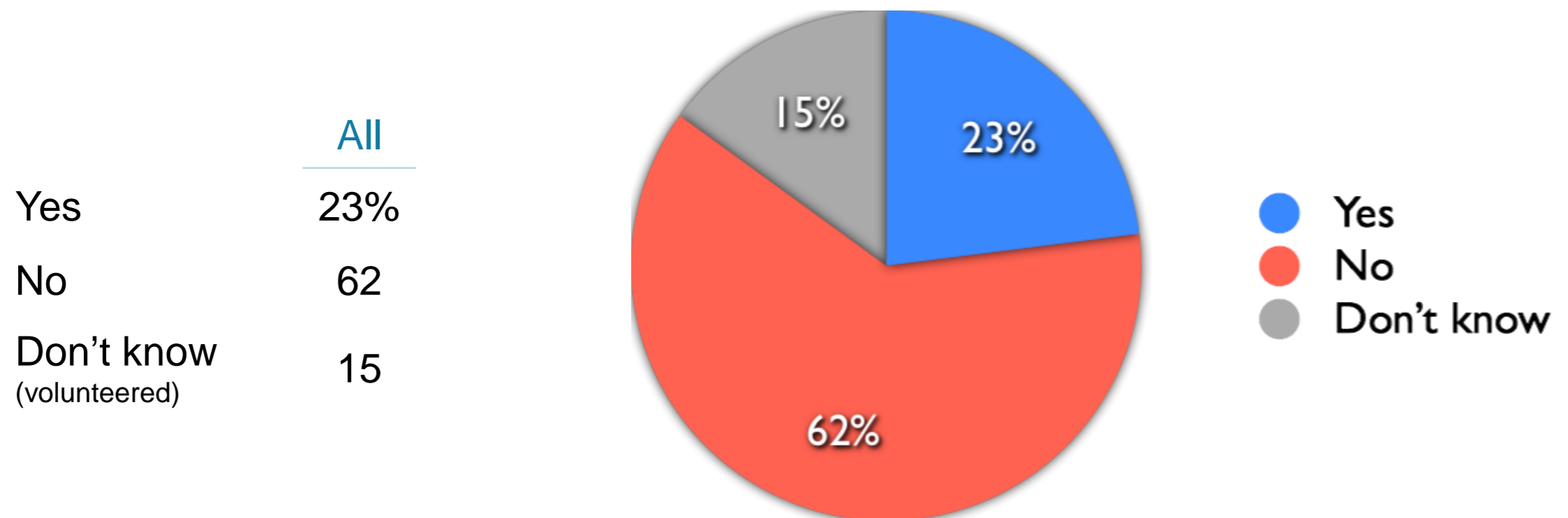
	All
Falling behind other developed countries	47%
Is about even with other developed countries	25
Running ahead of other developed countries	22
Don't know (volunteered)	7

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Desired Funding Changes Over the Next Year

Law Enforcement Using Latest Technologies

Do you think most local and state police departments in the United States are fully using the latest law enforcement technologies to keep the public safe — yes or no?
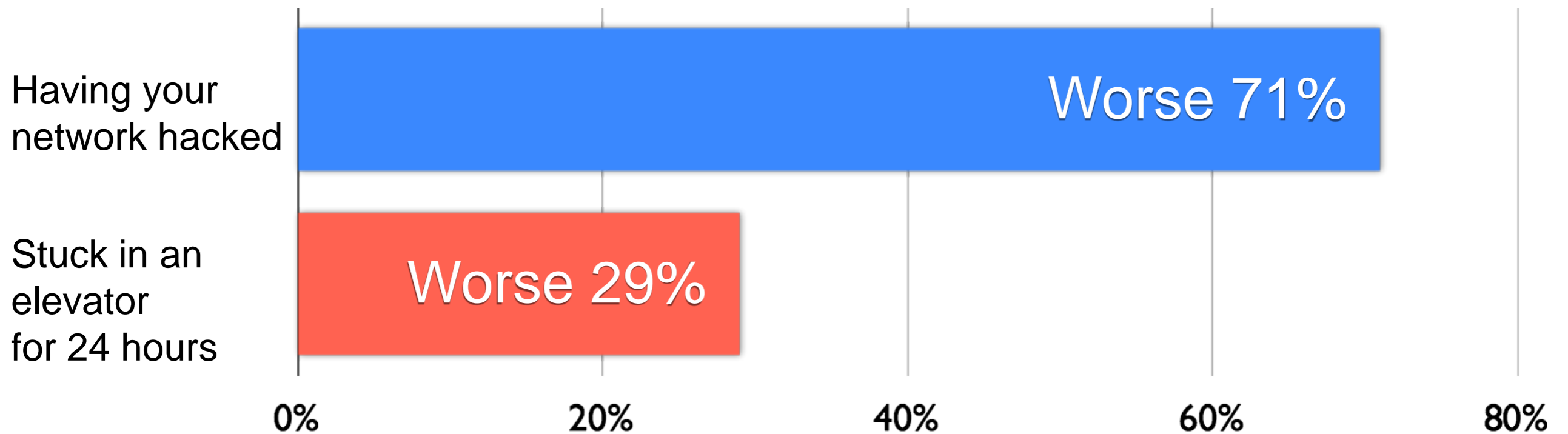
	All
Yes	23%
No	62
Don't know (volunteered)	15

Pie chart:
- 23% Yes (blue)
- 62% No (red)
- 15% Don't know (gray)

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Hacked network vs. Stuck in an elevator

Which of these two possibilities would be worse — having your network hacked … or … getting stuck in an elevator for 24 hours?

	All
Having your network hacked	71%
Stuck in an elevator for 24 hours	29

Having your network hacked — Worse 71%

Stuck in an elevator for 24 hours — Worse 29%

0% 20% 40% 60% 80%

Key Findings

Most important technology goal

- Reducing costs was rated the top goal, followed by improving security, boosting efficiency, and improving delivery of services.
    - Improving security was rated the top goal within the federal sector and reducing costs was the top concern of the state/local sector.

Investments over the next year

- Cybersecurity is expected to experience the greatest increase in investment over the next year. That's followed by cloud computing and networking, rounding out the top three.
- Cybersecurity and cloud is expected to increase more rapidly in the federal sector. On the other hand, networking is expected to increase more rapidly in the state/local sector.
- Big Data analytics is expected to see a greater rise in federal investment than state/local investment.

Greatest threats to IT infrastructure

- Budget constraints are seen as the top threat — especially among the state/local sector.
- Cyber attacks is a bigger concern in the federal sector than the state/local sector.
- It should be noted that a significant percentage of all respondents surveyed (22%) *volunteered* that all the possible threats we offered (i.e., budget constraints, cyber attacks, limited bandwidth, increased demand, employee personal devices) should be considered "the greatest threat."

Strengthen nation's cybersecurity

- While better technology leads the three options provided as the most effective way to strengthen the nation's cybersecurity, better enforcement and training followed closely behind.
  - Significantly, 42% of those surveyed *volunteered* that all three solutions, combined, should be viewed as "the most effective."

Cloud computing

- Most respondents surveyed have "some confidence" in the reliability, security, and effectiveness of cloud computing.
  - Few said they had either "great confidence" or "no confidence."

SDN/Internet of Everything

- 65% of respondents were familiar with SDN — and, of those who are, most of them (58%) expect that it will become a viable solution "sometime in the next few years."
- 57% of respondents were familiar with the concept of the "Internet of Everything" or the "Internet of Things" — and, of those who are, most see its greatest benefit as enabling new services, followed by streamlining processes and reducing costs.

Where new technology spending increases are most needed

- Education was the top choice to "greatly increase spending" — followed by healthcare, homeland security, and emergency disaster management.

General interest issues

- A plurality of respondents (47%) believe the U.S. is falling behind other developed countries in the deployment of broadband; 25% said the U.S. is about even and 22% said the U.S. is running ahead.
  - Interestingly, there was little difference between the federal and state/local sectors on this question.

- 62% of respondents do *not* believe most local and state police departments are fully using the latest law enforcement technologies (among state/local sector respondents, it was 66%).
- 71% of respondents surveyed would rather get stuck in an elevator for 24 hours than have their networks hacked.

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Investments Over the Next Year

Over the next year, will your organization or agency likely increase, decrease or maintain current levels of investment in the following?

	Increase	Decrease	Maintain
Cybersecurity	59%	6%	31%
Cloud	45	9	36
Networking	42	6	49
Video conferencing	39	7	48
Data center	35	14	46
Broadband	32	8	50
Collaboration solutions	30	6	51
Big Data analytics	28	8	48

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Funding Over the Next Year

Thinking about the various ways the U.S. government invests in new technology … For each of the following areas of new technology development, please tell me whether you think the U.S. government should greatly increase spending, somewhat increase spending, somewhat reduce spending, or greatly reduce spending …

	Greatly Increase	Somewhat Increase	TOTAL INCREASE	Greatly Reduce	Somewhat Reduce	TOTAL REDUCE	Keep Same (volunteered)
Education	34%	34%	68%	7%	11%	18%	13%
Healthcare	29	37	66	10	13	23	10
Homeland security	26	36	62	5	13	18	18
Emergency disaster management	18	42	60	4	15	19	20
The military	21	35	56	9	18	27	16
State and local law enforcement	17	36	53	6	16	22	23

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