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Mobilemania Sweeps the Enterprise

The iPass Global Mobile Workforce Report

Understanding Enterprise Mobility Trends and Mobile Usage

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To receive a briefing on iPass research regarding enterprise mobility trends and management [Contact Us](#).



The iPass 2011 Mobile Enterprise Report

Q4 2011: Understanding Enterprise Mobility Trends and Mobile Usage

Executive Summary

This quarter's iPass Mobile Workforce report examines trends and habits in the usage of mobile tools. It also reveals some interesting facts about how these tools are affecting the lifestyle of mobile workers:

- The median age of a mobile employee is 41, five years younger than in 2010.
- 95 percent of mobile workers now have smartphones, up from 85 percent in 2010.
- 91 percent use their smartphones for work, compared to 69 percent in 2010.
- Tablet ownership has grown to 44 percent of mobile employees, up from 33 percent in Q2 of 2011.
- The iPhone is now the top smartphone in the enterprise with 45 percent marketshare among mobile workers, up from 31 percent in 2010.
- 58 percent of mobile employees are provisioned smartphones by their companies; this is down from nearly two-thirds a year ago. 42 percent of employees have individually liable smartphones.
- Only 28 percent of mobile workers are given no choice when it comes to smartphone selection; the majority of enterprises offer their employees some choice (62 percent) - 44 percent can select from a list of smartphones, and an additional 19 percent can use any device they choose to access corporate resources.
- 42 percent of mobile employees leave their laptop at work and just use a smartphone or tablet in the evenings or on the weekends, at least occasionally.
- 59 percent of mobile employees gave an emotional response when asked how they would feel if they went without their smartphones for a week. Among mobile employees with an emotional response, 40 percent would feel disoriented, 34 percent would feel distraught, and 10 percent would feel lonely without their smartphone.
- One in four mobile workers sleeps less than six hours a night. And one in three mobile workers claimed that they got less sleep because of work.
- While 45 percent of mobile workers exercise regularly, 56 percent exercise erratically or not

at all. 60 percent cited work as the number one reason that they didn't get as much exercise as they should.

- When traveling, 44 percent believe travel contributes negatively to their overall health. Only 9 percent consider travel a positive, and 47 percent see no effect at all.
- Mobile workers don't waste much time during the day on technology distractions - only about 28 minutes on average. The top two reasons are work-related (one email and two technical issues), followed by social media.
- Most mobile workers described themselves as highly proficient when it comes to technology (69 percent), compared to 6 percent who rated themselves as fairly proficient or non-proficient. And mobile workers only contacted IT as a last resort (81 percent), while 2 percent had IT on speed dial.

Introduction

The mobile workforce appears to be getting younger, as companies loosen up their smartphone and tablet liability policies, and mobile devices proliferate deeper in the enterprise. In fact the median age of a mobile worker has dropped from 46 in 2010, to 41 in 2011. Perhaps this "youthening" of the mobile workforce is a result of another great change in the workforce, that mobile employees are no longer the elite, they are pretty much every knowledge worker with a smartphone, now allowed to access corporate resources.

And how many mobile workers use smartphones? In 2010, 69 percent of mobile employees used a smartphone for work (although 85 percent owned a smartphone). Today, work usage on a smartphone has grown to 91 percent. Tablet usage has grown 30 percent in first three quarters of this year, to 44 percent market share among the mobile employees.

The saturation of the smartphone and the tablet has enabled a hyperconnected workforce that is self-admittedly emotionally attached to its smartphones. The thought of being without a smartphone for even



a week solicited an emotional response among nearly 59 percent of mobile employees surveyed. Of those with an emotional response, 40 percent said they would feel disoriented, 34 percent would feel distraught, and 10 percent would feel lonely without their smartphone.

In this quarter's survey, we also explored whether mobile work impacted health for the good or for the bad. What we found was both surprising and disturbing. While only 13 percent of mobile employees believed that a mobile work environment was having a negative impact on their health - mainly because they were working all the time - one in four mobile workers didn't get enough sleep a night, and half exercised erratically, if at all. And the reason for the lack of sleep and lack of exercise: Work.

And while mobile employees are working around the clock, they are taking breaks... Facebook has replaced the "smoke break" of old, without the nasty health side effects. Although in the recent past, corporate managers have worried about workers wasting time on social media sites, this simply is not the case. Mobile employees are working on average 240 more hours a year, but only wasting 28 minutes a day on "technology distractions." The top technology distractions were work email (we have all experienced the joy of spam), followed by technical difficulties. Both are side effects of working in a hyper-connected culture.

But don't jump to any conclusions when it comes to technical difficulties. The mobilocracy is in full force, and mobile employees report that they are highly proficient when it comes to technology. 81 percent only contact IT as a last resort. As we predicted last year, the role of IT has evolved and mobile workers are increasingly taking an interest in—and responsibility for—their personal and professional mobility strategy. The era of the dependent worker whose computer won't boot because he didn't plug it in is over. Today's highly capable mobile workers can troubleshoot most technical problems, go to the Internet for help—instead of the IT helpdesk—and will work around the rules if need be. The era of the "corporate mobilocracy" (mobility rule) is underway.

Survey Methodology

This quarter's iPass Mobile Workforce Report is based on information obtained from more than 2,300 responses to an iPass survey of mobile workers at over 1,100 enterprises worldwide. The survey respondents were asked a set of questions about their productivity, efficiency, work habits, and other related experiences. The survey also looked at smartphone usage and tablet trends, and how the mobile work lifestyle was affecting the health of respondents.

The survey was conducted between September 27 and October 26, 2011, and represented employees across multiple age groups and geographies. 49 percent of respondents were from North America, 32 percent from Europe, and 12 percent from the Asia/Pacific region.

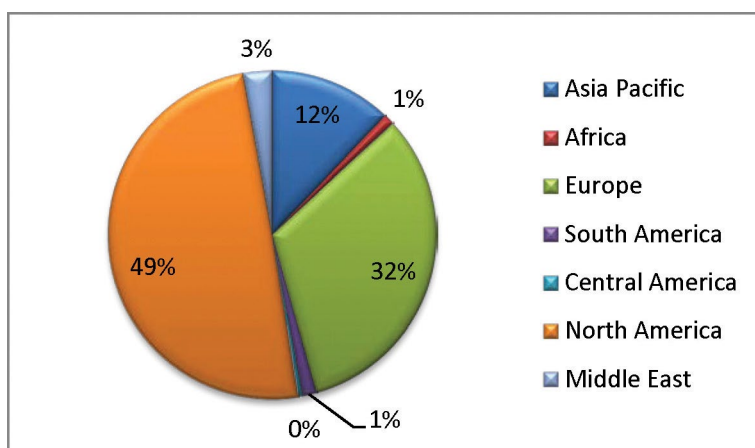


Figure 1: Location breakdown of iPass survey respondents.

66 percent of respondents in this quarter's survey were between the ages of 35 and 54.

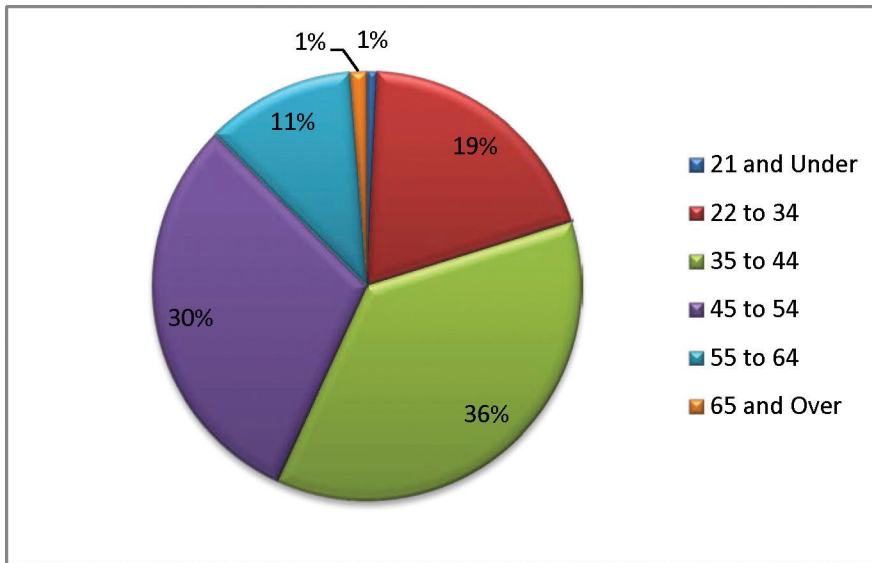


Figure 2: Age breakdown of iPass survey respondents.

iPass Mobile Employee Definition: Any worker using any mobile device (including laptop, smartphone, cellphone, or tablet) who accesses networks for work purposes.

There are Apples and Androids in the Enterprise

In 2010, we determined that the median age of a mobile worker was 46. This year it dropped five years to 41. Why? It has everything to do with Apples and Androids in the enterprise, the loosening of corporate liability policies, and the expansion of the mobile workforce. This quarter's survey revealed that we are reaching saturation of the smartphone among mobile employees, with tablets not far behind. Specifically:

- 95 percent of mobile workers now have smartphones, up from 85 percent in 2010. 91 percent use their smartphone for work, compared to 69 percent in 2010.
- Tablet ownership has grown to 44 percent of mobile employees, up from 33 percent in the second quarter of this year.

The iPhone is now the top smartphone in the enterprise with 45 percent marketshare among mobile workers, up from 31 percent in 2010. Interestingly, iPhone market share is 10 percentage points above BlackBerry's market share last year when it held the number one spot.

And the BlackBerry has not really fallen from the top spot in so much as other smartphones have grown faster. BlackBerry market share has only declined slightly from 35 percent in 2010 to 32 percent today, while Android nearly doubled market share year over year, growing into the number three spot (surpassing Nokia/Symbian) with a 21 percent market share. This is reflective of more choice in the enterprise. According to the recent [iPass Mobile Enterprise Report](#), 73 percent of enterprises now allow non-IT managed devices to access corporate resources.

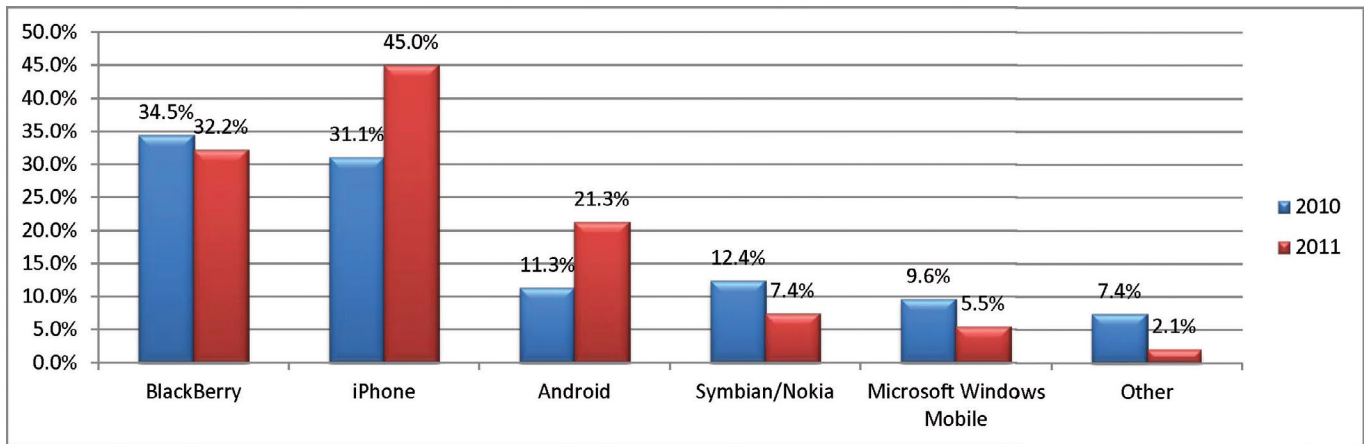


Figure 3. Do you currently have any of the following smartphones?

In 2012, it looks like iPhone will continue to lead in the enterprise, followed by Android smartphones with Microsoft Windows Mobile smartphones a distant third.

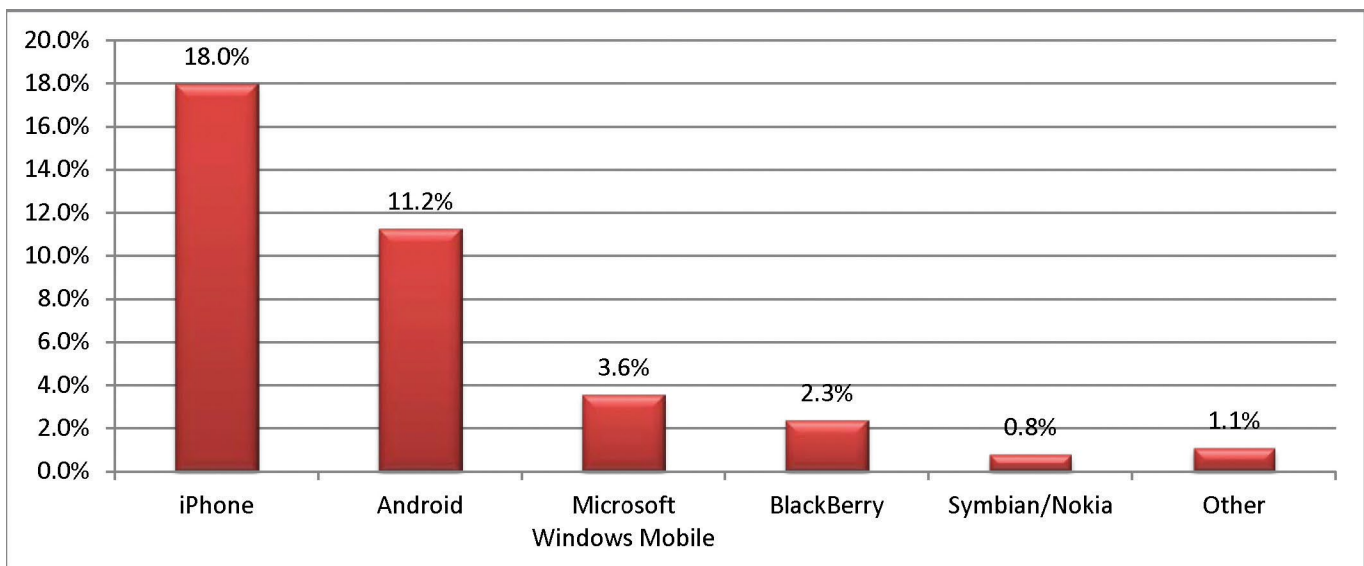


Figure 4. Do you intend to receive or purchase any of the following smartphones in 2012?

The mix of corporate-provisioned versus individually liable has also shifted. Today 58 percent of companies provision smartphones to their employees; this is down from nearly two-thirds a year ago. 42 percent of employees have individually liable smartphones - they purchase and pay for their own devices. This validates the trend we are seeing as companies loosen the reigns of liability; more employees in the enterprise are allowed to use smartphones.

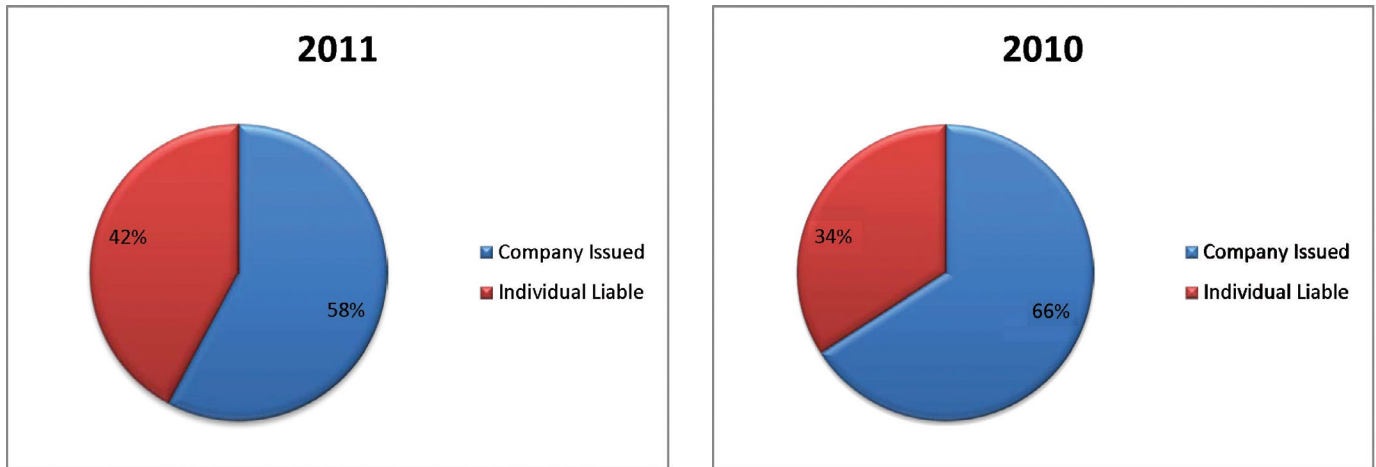


Figure 5. Is your smartphone a company-issued or a personally liable device?

We are still seeing a blended approach to smartphone usage, and we don't expect this to change anytime soon. 79 percent of mobile workers use their smartphones for some combination of work and personal business. Only seven percent use their smartphone exclusively for work. As we all work more hours and become increasingly reliant on our smartphones, they continue to be a powerful tool in keeping our lives in order.

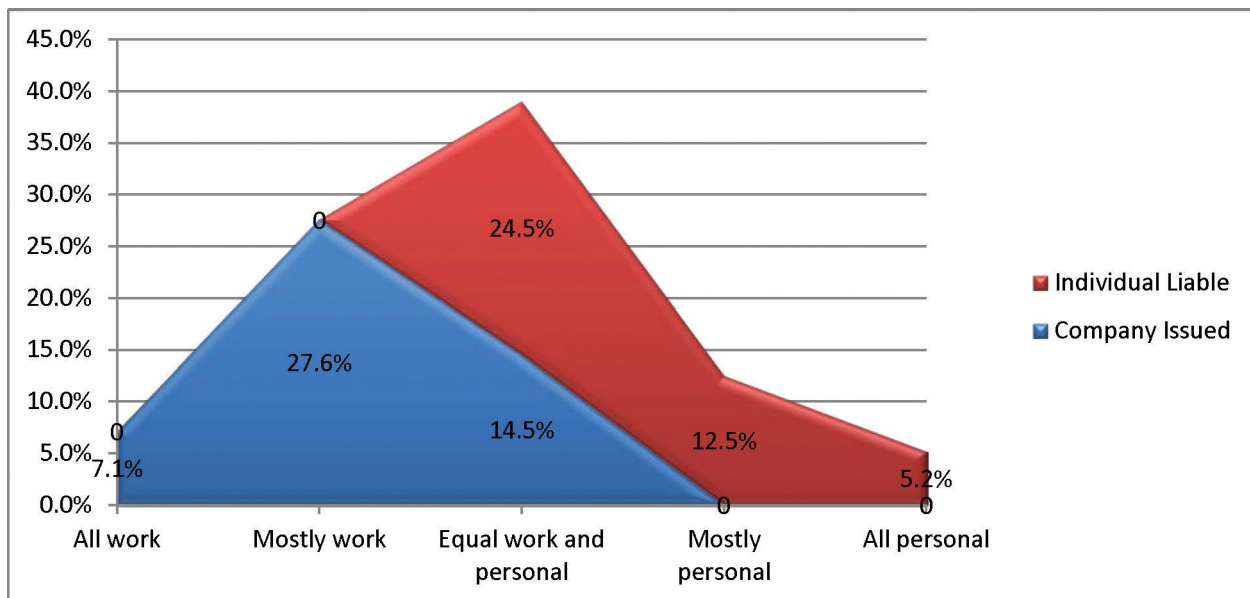


Figure 6. Do you view your smartphone as primarily a work or a personal device?



The tablet market also continues to inch up and advance penetration in the workplace. 44 percent of mobile employees have some form of tablet, compared to 41 percent in the third quarter of this year and 33 percent in the second quarter. iPad remains the dominant tablet with 59 percent of tablet owners owning an iPad, and 47 percent owning the newer iPad 2. When you look at those who already have or intend to buy an iPad 2 within six months, the responses were remarkably consistent across all age groups at approximately 56 percent. The third most popular tablet with nine percent usage among tablet owners was the Samsung Galaxy. This is the strongest showing this year for a non-iPad tablet, indicating that there might just be a competitive marketplace yet for tablets. Also of note, the new Amazon, BlackBerry Playbook and Windows 8 tablets are making a showing, at least on the wish list for mobile employees in 2012.

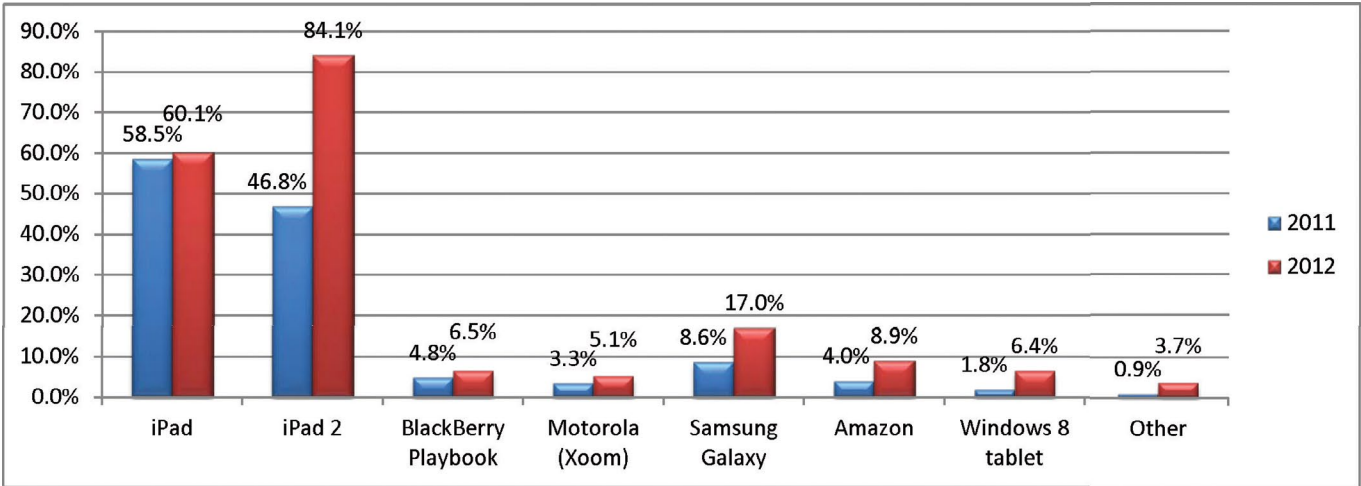


Figure 7. Do you currently have, or intend to receive or purchase any of the following tablets in the next six months?

Within the workplace, tablets remain a personal device that is useful for work. While 75 percent of tablet owners use their tablet for some work at least occasionally, only four percent use them for just work. And the majority of tablets used in the enterprise are purchased and paid for by employees (77 percent).

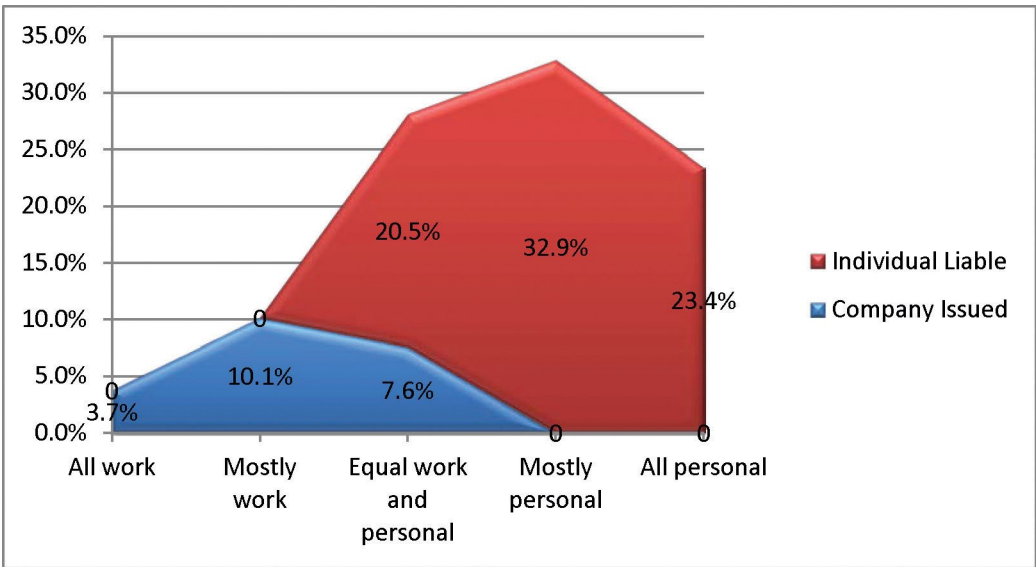


Figure 8. Do you view your tablet device as primarily a work or a personal device?



As companies allow mobile workers to use their personal devices, they are also allowing more employee choice. The day of the BlackBerry-only shop is becoming a thing of the past, with only 28 percent of mobile workers given no choice when it came to smartphone selection. Meanwhile, the majority of enterprises offer their employees some choice (63 percent) - 44 percent can select from a list of smartphones, and an additional 19 percent can use any device they choose to access corporate resources.

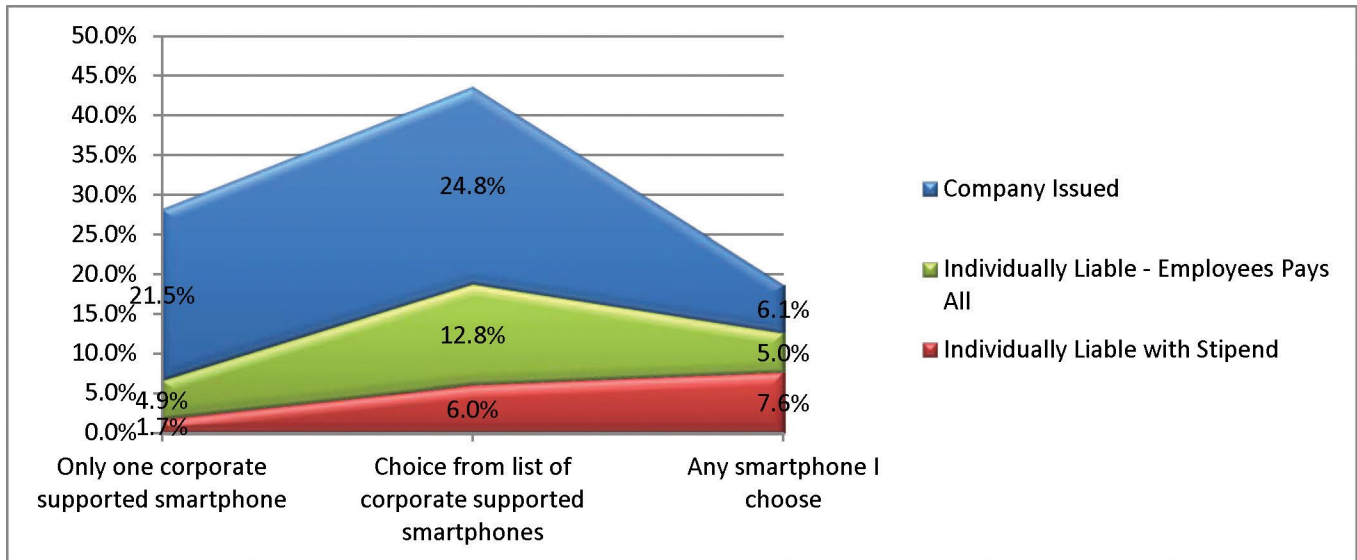


Figure 9. What is the corporate policy on your smartphone?

While companies are adding support for iPhone (20 percent) and Android (14 percent), they are slowing down their investments in BlackBerry. Four percent of mobile employees reported that their companies had or were in the process of discontinuing support for the BlackBerry, followed by the Nokia/Symbian, and Microsoft Windows Mobile. In 2012, as the mobile workforce grows and as iPhone and Android deployments soar, BlackBerry adoption will remain stagnant. These numbers remain consistent globally.

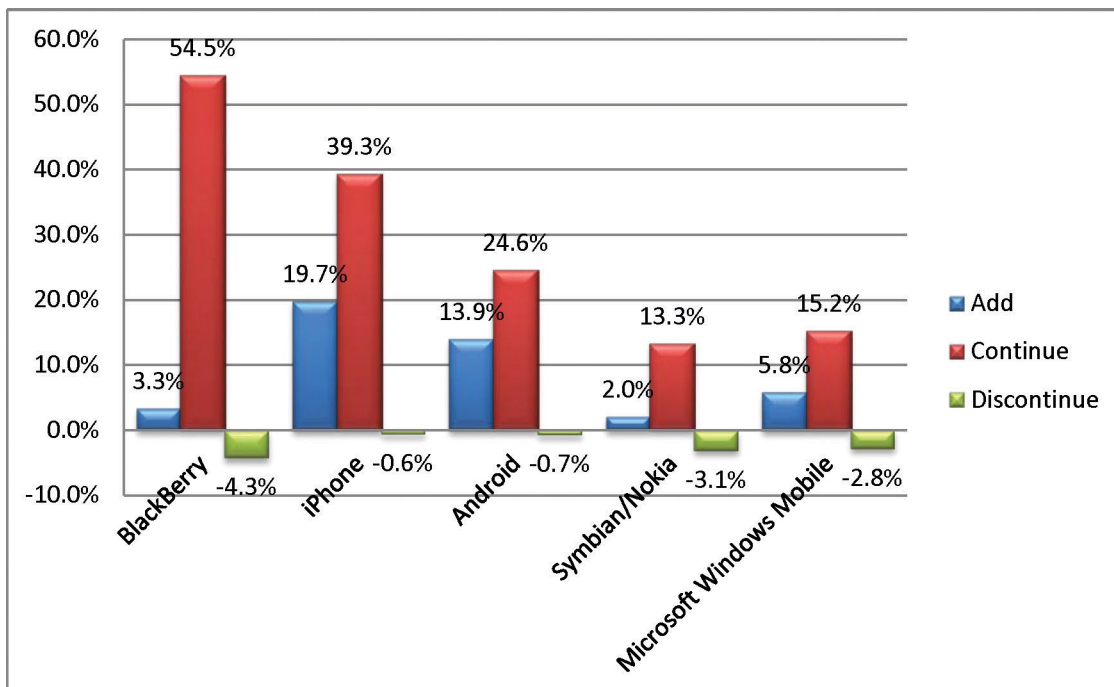


Figure 10. Has your company's smartphone policy (as stated above) recently changed or do you anticipate it will change over the next 12 months? If so has your company added support, continued support or discontinued support for any smartphones or will it in the next 12 months? (Multiple selections allowed)

We are seeing mass adoption of smartphones and astounding growth of tablets, but are mobile employees abandoning their laptops, chaining them to their desks when they leave for the day? The answer is mobile employees are doing this increasingly. 42 percent of mobile employees leave their laptop at work and just use a smartphone or tablet in the evenings or on the weekends, at least occasionally. This was up from 38 percent in 2010.

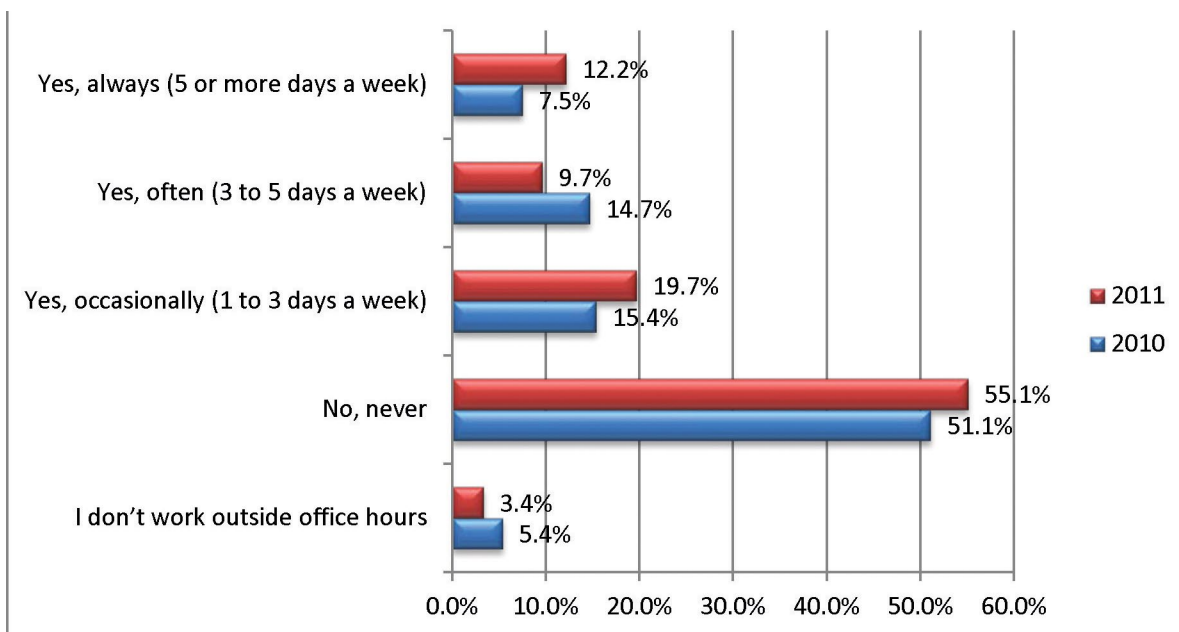


Figure 11. Do you leave your business laptop at work on weekends/evenings and just use your smartphone or tablet?

The habit of leaving the laptop at work was more frequent among younger employees than older.

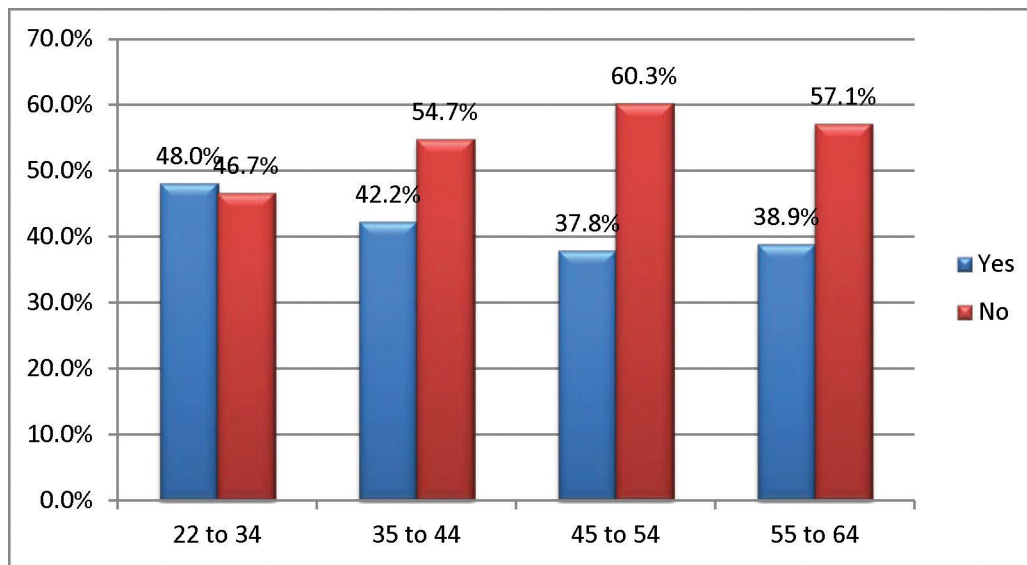


Figure 12. Do you leave your business laptop at work on weekends/evenings and just use your smartphone or tablet? (By age)

While mobile workers see themselves using tablets (59 percent) and smartphones (51 percent) more in 2012, 25 percent believe they will use the laptop less. When we looked at the ratios between using a device more versus less, some interesting numbers emerged. The laptop had a ratio of .61, meaning 14.9 percent will use them more and 24.6 percent will use it less. The tablet had a whopping 49.8 ratio, so respondents are nearly 50 times more likely to increase their tablet usage than decrease it. The ratio for use of the smartphone was 19. We believed that ratio would have been closer to even, because that tool has always been a stable part of the business arsenal. The desktop computer ratio was a predictable low .18, with respondents nearly six times more likely to reduce its usage than to increase it. Again we are seeing the laptop become the new desktop computer - tethered to the wall and used less often in favor of more convenient smartphones and tablets.

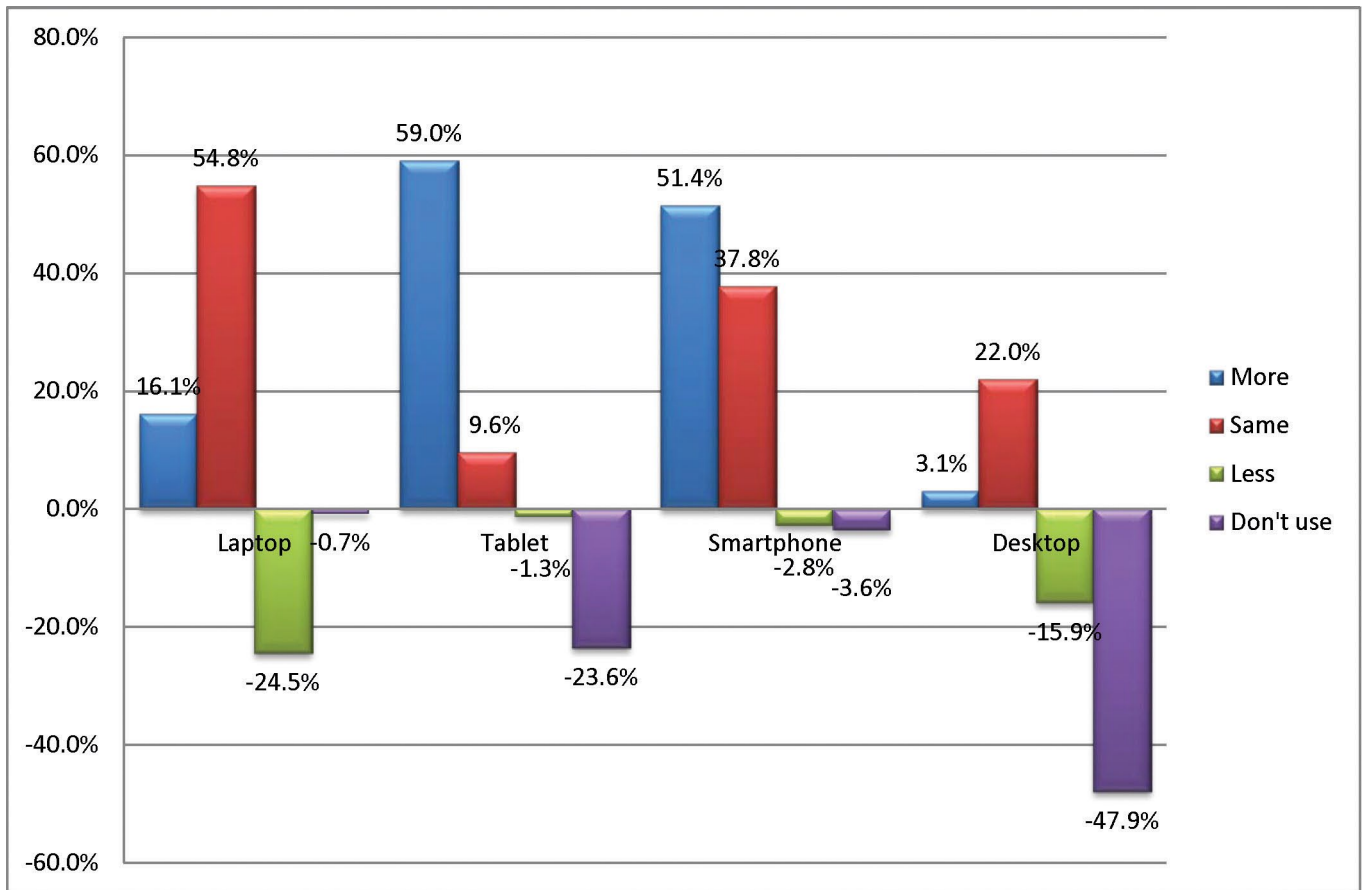


Figure 13. In 2012, do you see yourself using any of the following devices that you now use more or less?

With this increased smartphone penetration in the enterprise, security remains an issue for enterprises among their smartphone users. 21 percent of mobile workers had experienced a security issue related to a smartphone (lost, stolen, hacked, or contracted a virus) similar to 2010 (19 percent). Workers in the 22-34 age group were nearly three times more likely to have their smartphones lost or stolen (20 percent) versus the oldest (55-64) age group at eight percent.

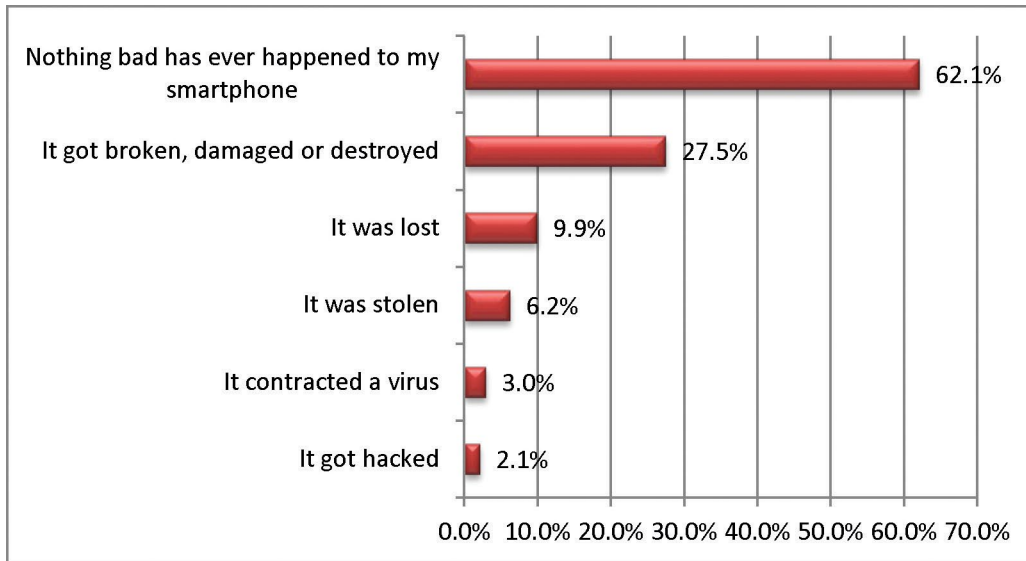


Figure 14. What was the worst thing that has happened to your smartphone containing business data? (Multiple selections allowed)

Recommendations for IT

- Embrace “bring your own device.” Smartphones and tablets are highly personal devices. Assume multi-device within your enterprise, whether you ask employees to select from a list of IT-endorsed devices, or you let them choose any device they want.
- Invest in security protection in case of lost or stolen smartphones. One in five mobile employees is claiming a security issue, and with the increased population of smartphone users in your enterprise--it is better to be safe than sorry.
- Put policies for tablets in place. This is newer technology, so there are more potential issues and problems. If you are not including tablets as part of your mobility strategy, you should. Policies should be consistent across smartphones and tablets. So review your policies to make sure you are not leaving openings that put your information at risk by ignoring some devices or securing some devices less than others.
- Know what technology your employees are using and plan accordingly. Today it is iPhones, iPads, and Android devices – and this looks to remain the theme for the next few years.

Mobile Work Lifestyle and its Effect on Your Health

There is a potentially disturbing story when it comes to a mobile work lifestyle and health. We know that mobile workers are working around the clock, putting in 240 hours more a year on the job on average, but feel happier and satisfied. But are they healthy... not just physically, but mentally? Have they become addicted to their smartphones, and what are the implications of "hyperconnectedness" on their health?

Smartphone Attachment

The thought of one week without a smartphone is enough to elicit a panic attack from many of us. Our hearts beat faster, our palms get sweaty, and the anxiety builds. What will we miss? Will we be off our game? How will we occupy downtime?

59 percent of mobile employees gave an emotional response when asked how they would feel if they went without their smartphones for a week – 52 percent would have a negative emotional response, and only seven percent would have a positive response. Among mobile employees with an emotional response, 40 percent would feel disoriented, 34 percent would feel distraught, and 10 percent would feel lonely without their smartphone.

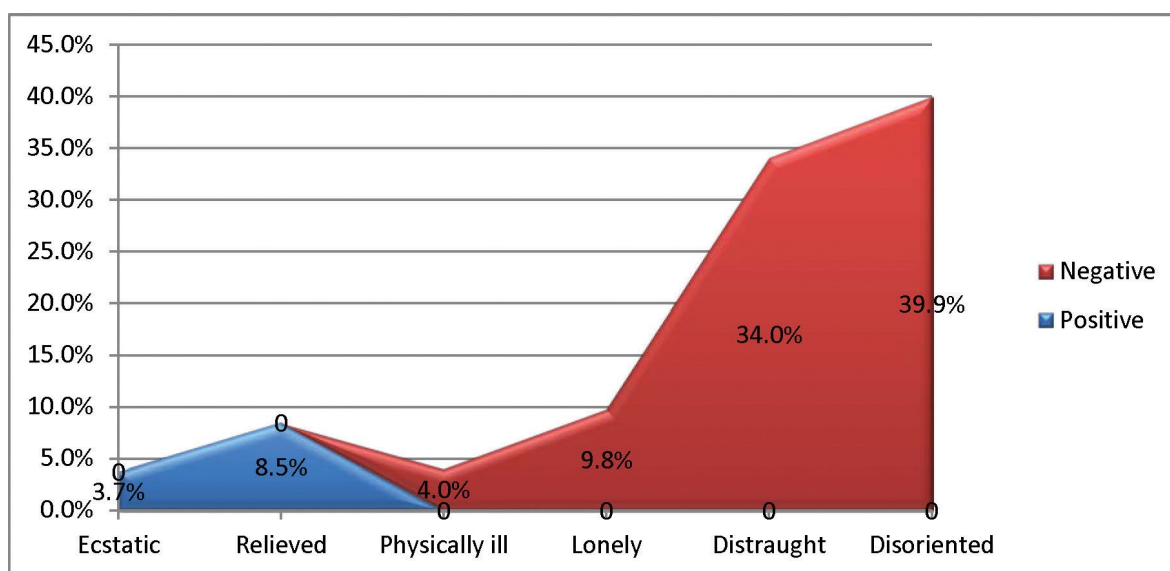


Figure 15. If you were without your smartphone for a working week, how would you feel? (those with an emotional response)

Although 91 percent of mobile workers described their health as good or excellent, nine percent described their health as fair, poor, or unknown. However, most mobile employees saw their mobile work environment contributing to their overall health. Nearly half saw a mobile work environment as positive to their overall health because of the flexibility of working when and where they chose. Conversely 13 percent found this work style as impacting their health negatively, because they were working all the time. Interestingly, when we looked at some of the pillars of good health -- sleep and exercise -- even mobile employees who saw themselves as healthy were not getting enough of either.

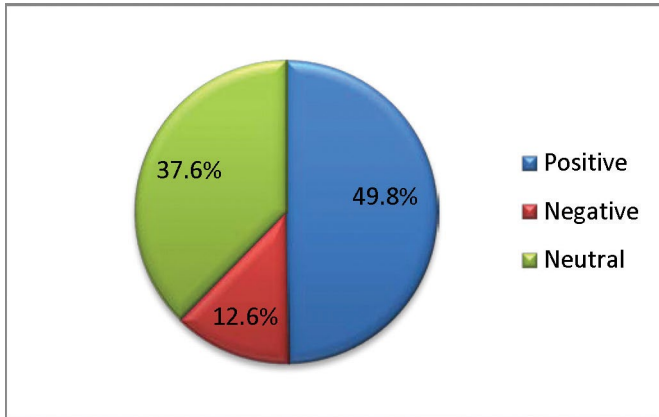


Figure 16. Does a mobile work environment (mobile technology keeps you connected to the office, giving you the ability to work anytime, anywhere) contribute positively or negatively to your overall health?

Getting Enough Sleep?

Studies show the average adult needs seven to nine hours of sleep per night, and many mobile workers average nearly seven hours. However, one in four mobile workers didn't sleep enough (less than six hours a night). This was highest among 35 to 54 year olds, which could also tie in with the pressures of the high earning and parenting years. Higher job stress based on the current economic environment could also be a factor. Researchers from the University of Warwick, England and the Federico II University medical school in Naples, Italy, analyzed 16 studies (published in the May 2010 issue of Sleep) that covered 1.3 million people. The studies found that people who got fewer than six hours of shuteye per night were 12 percent more likely to die before the age of 65 than people who got six to eight hours of sleep a night.

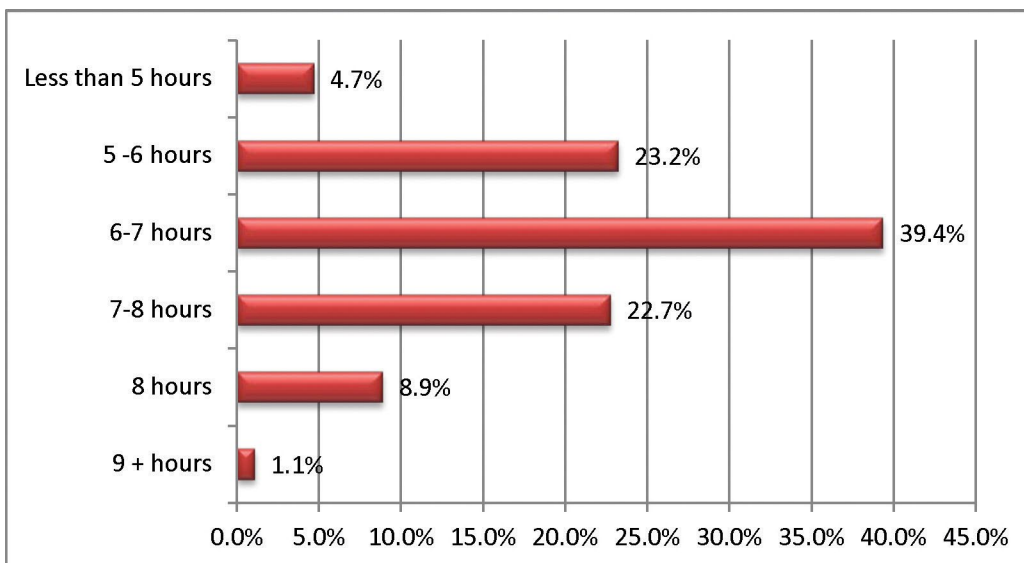


Figure 17. How many hours do you sleep on average each work night?



And one in three mobile workers claimed they got less sleep because of work. When asked about sleep, 52 percent of mobile workers said that their mobile work habits affected their sleep - 35 percent negatively, and 16 percent felt more tired and went to sleep earlier.

Older mobile workers were more likely to claim that they got plenty of sleep and did not let their work habits impact their sleep, with 31 percent in the 22-34 age group making the claim, and ramping up to 48 percent in the 55-64 age group. Is it that older mobile employees are less hyperconnected? Or is it that they are better able to manage their work stress and not let it affect their sleep patterns?

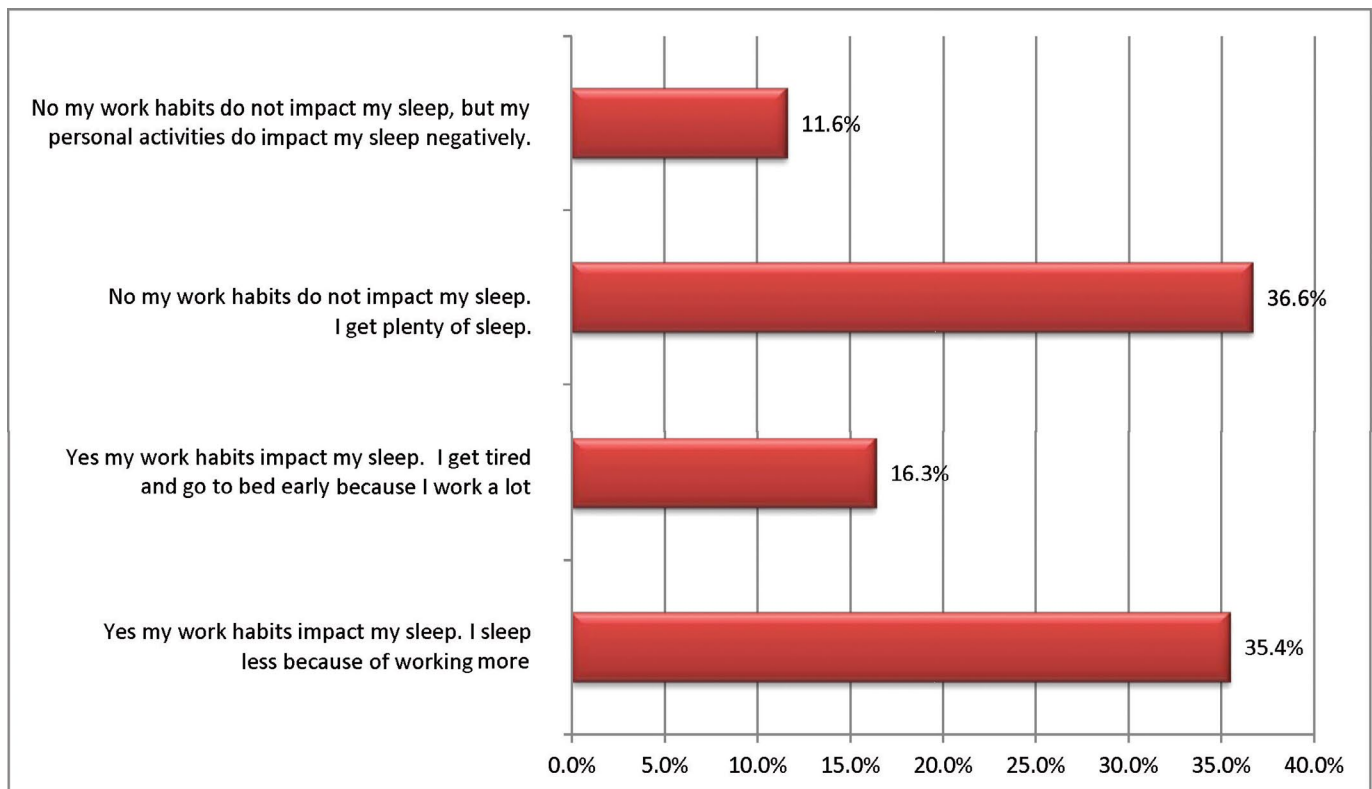


Figure 18. Do your work habits impact your sleep?

Is Exercise a Priority?

The Mayo Clinic recommends 75 to 150 minutes of exercise a week. Yet many mobile employees are not exercising at all. While 45 percent of mobile workers exercised regularly within the recommended weekly total, 56 percent exercised erratically or not at all.

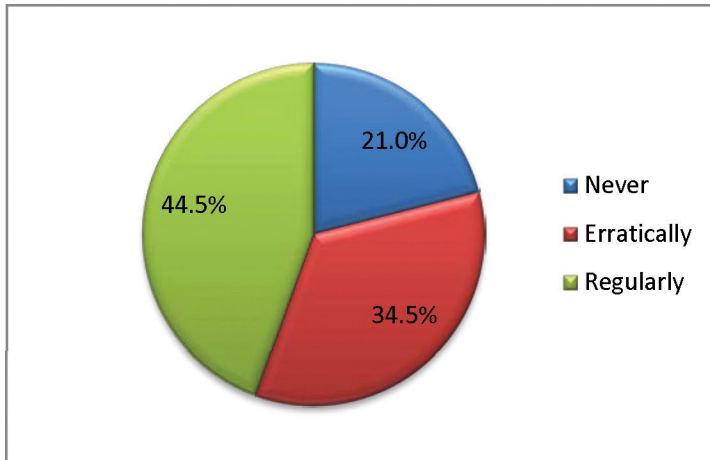


Figure 19. Do you exercise?

60 percent cited work as the number one reason that they didn't get as much exercise as they should. For those who never exercised, the number one reason was that they didn't have the time (22 percent).

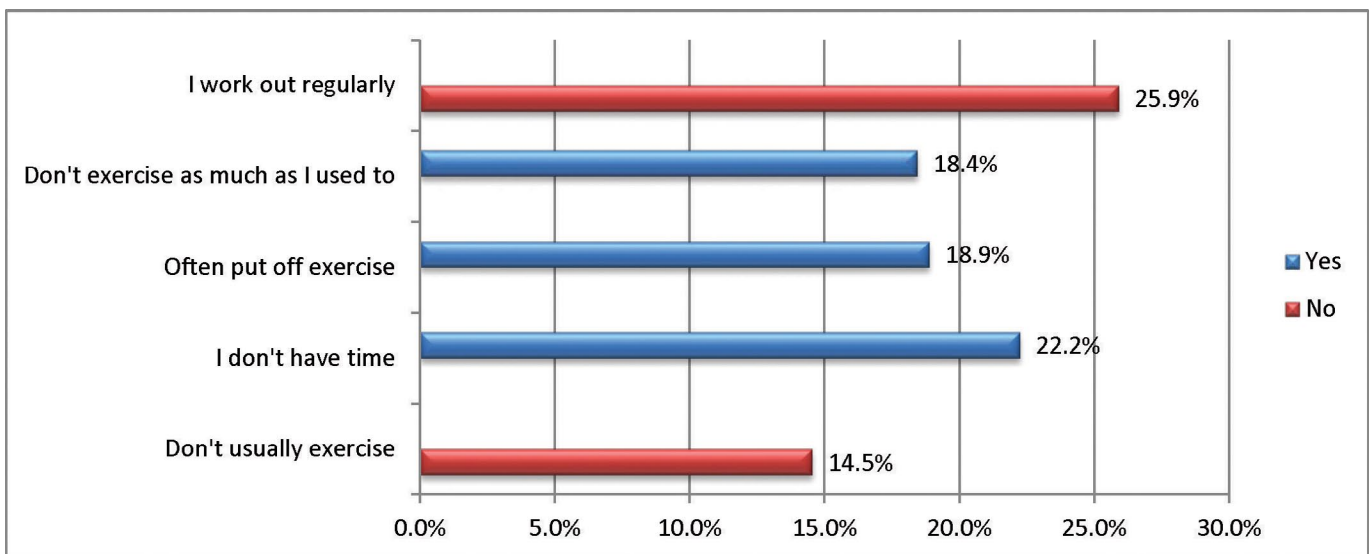


Figure 20. Does your work lifestyle impact your exercise routine?

Does Business Travel Impact Your Health?

Our survey respondents included a healthy population of business travelers, but were they healthy? This quarter's survey revealed that the average mobile worker in our survey traveled three to five days a month for work. More than a third (35 percent) spent more than a week a month on the road.

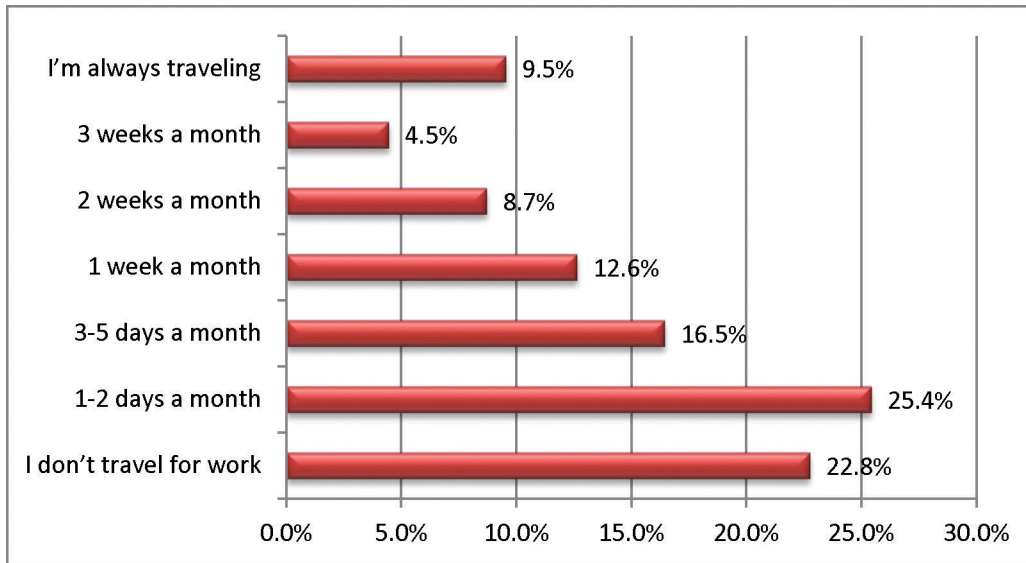


Figure 21. How often do you travel for work?

Between a packed schedule and eating out every night, it is a struggle to be healthy on the road. When traveling, 44 percent saw it contributing negatively to their overall health. Only nine percent saw it as a positive, and 47 percent saw no effect at all.

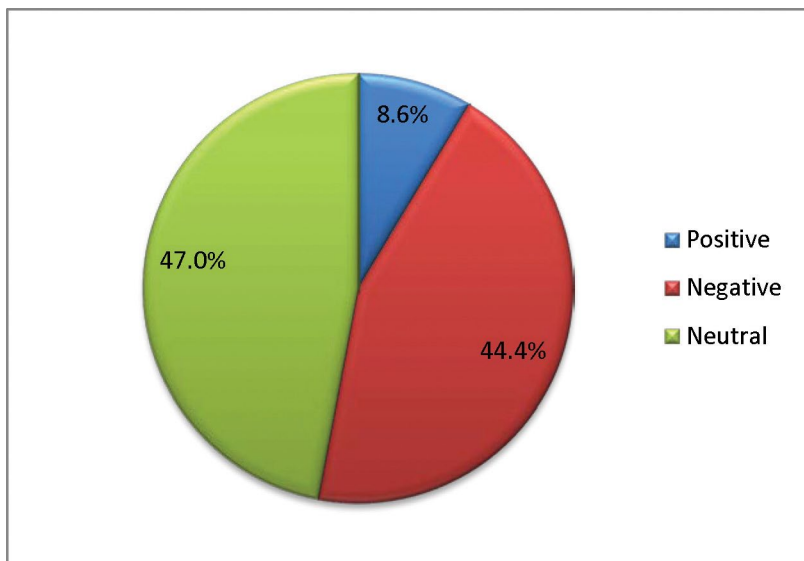


Figure 22. Does business travel contribute positively or negatively to your overall health?

Do Mobile Employees Take Vacation?

Now here is some good news. 67 percent of mobile workers took all or nearly all of their vacation days a year, while only 17 percent took less than half of their vacation time. When we looked at it by region, 81 percent of those in Europe, 63 percent those in North America, and 56 percent of those in Asia Pacific took all or nearly all of their vacation days. Only seven percent of those in Europe took less than half of their vacation time, compared to 21 percent of those in North America, and 24 percent in Asia Pacific.

Taking vacation time to unwind and relax is healthy, although we do know that mobile employees check in to work regularly while on vacation. Vacations are not only good for the employees' health, but it takes liability off the books, thus is also good for their company's bottom line.

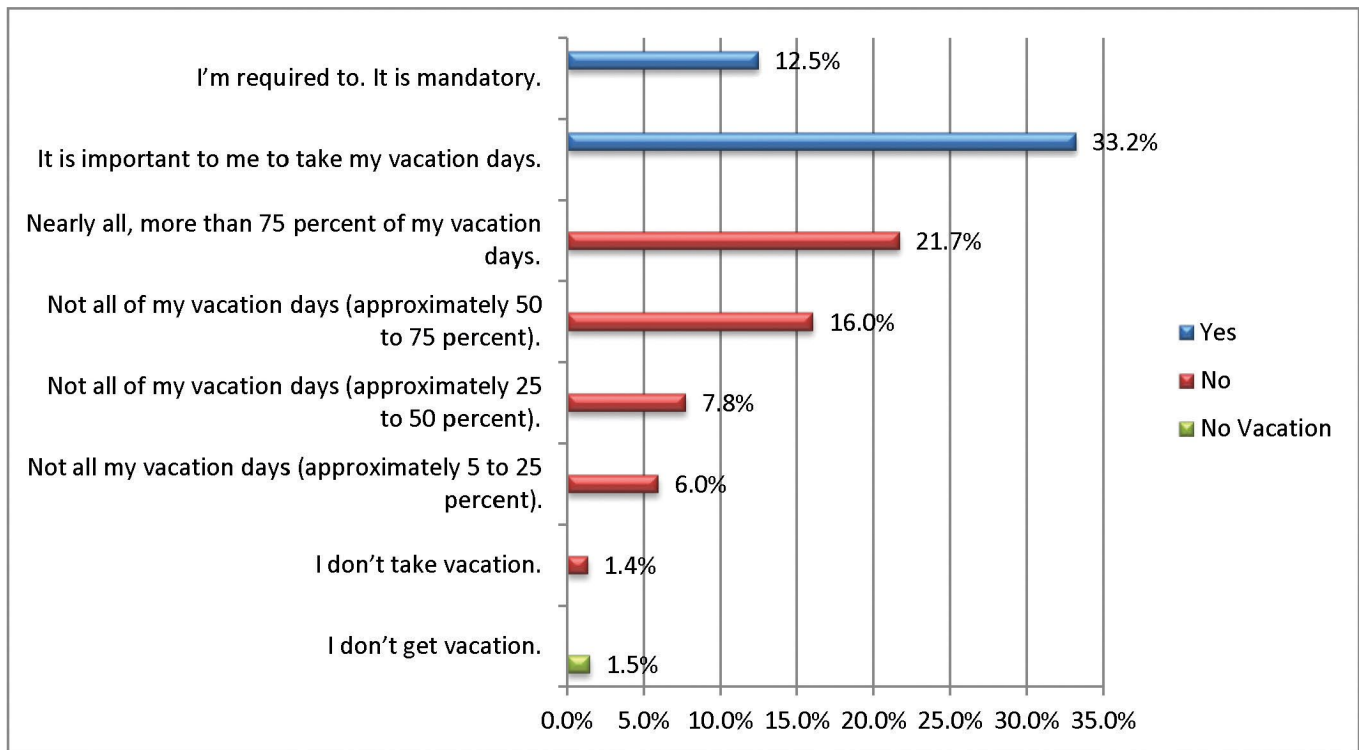


Figure 23. Do you take all of your vacation days each year?

Recommendations for IT

- In the case of “hyperconnectedness” and health, there is not much for IT to do. Mobile employees are grown-ups and make their own lifestyle decisions. However, approximately 20 percent of our respondents came from IT, so here’s some advice to you. When it comes to getting the job done, just as much can be accomplished when you take time to exercise, eat right, and get enough sleep. All of those elements contribute to a sharp mind and higher productivity at work.
- Remember that the health of your mobile workforce is key to your success. Consider giving, as a reward for performance, a year’s membership in a health club. Most cities have clubs that will honor these memberships for one-day usage by business travelers!

Facebook, the New Smoke Break (Without the Side Effects)

Facebook has now become the new 15 minute break at the water cooler, with all of the catch-up and gossip that mobile workers (that don't even bother to take a lunch) need. One in three mobile employees listed social media as one of their main technical distractions during the day.

As much as it has been reported (and enterprises have fretted over abuse), it turns out that the according to Nielson the average Facebook visitor spends approximately **10 minutes per day on its site**. Mobile employees are no exception. In fact, split between the possible technology distractions during the workday, social media sites ranked third.

The real surprise was that on average, mobile workers really didn't waste that much time during the day on technology distractions - only about 28 minutes - and the top two reasons were work-related (one email and two technical issues). 59 percent wasted 30 minutes or less, and 41 percent wasted 30 minutes or more. 18 percent wasted more than one hour a day on technical distractions. Now one could argue that work email by its nature is not a waste of time, but anyone who has ever slogged through hundreds of emails would surely disagree. The younger age groups were found to be more likely to spend at least 30 minutes distracted (48 percent for the 22-34 year olds), with older groups gradually decreasing to 33 percent for the 55-64 age group.

In net, the average productivity gains that mobile workers reported far outweighed technology distractions.

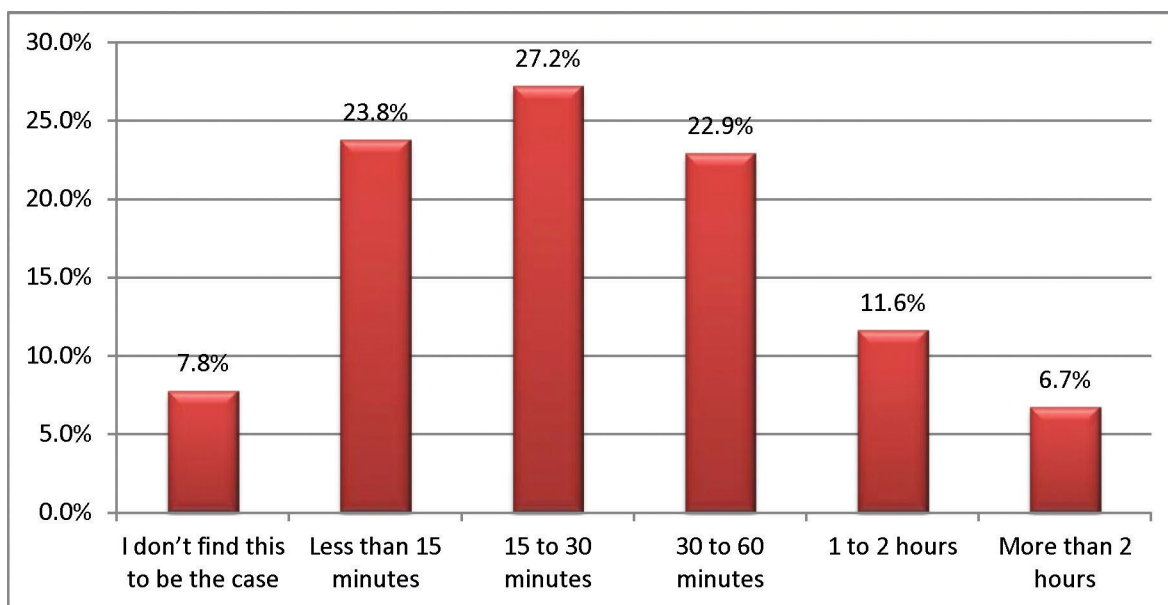


Figure 24. How much time do you waste on technology distractions during the workday?

The most time-consuming technology distractions were keeping up with work email (43 percent), followed by technical issues (30 percent), and social media sites (13 percent). When looking at the top three, those that reported work email spent the most time - 51 percent more than 30 minutes a day, 27 percent more than an hour. Only 16 percent spent more than an hour on social media sites, and only 10 percent spent more than an hour on technology issues during the typical workday.

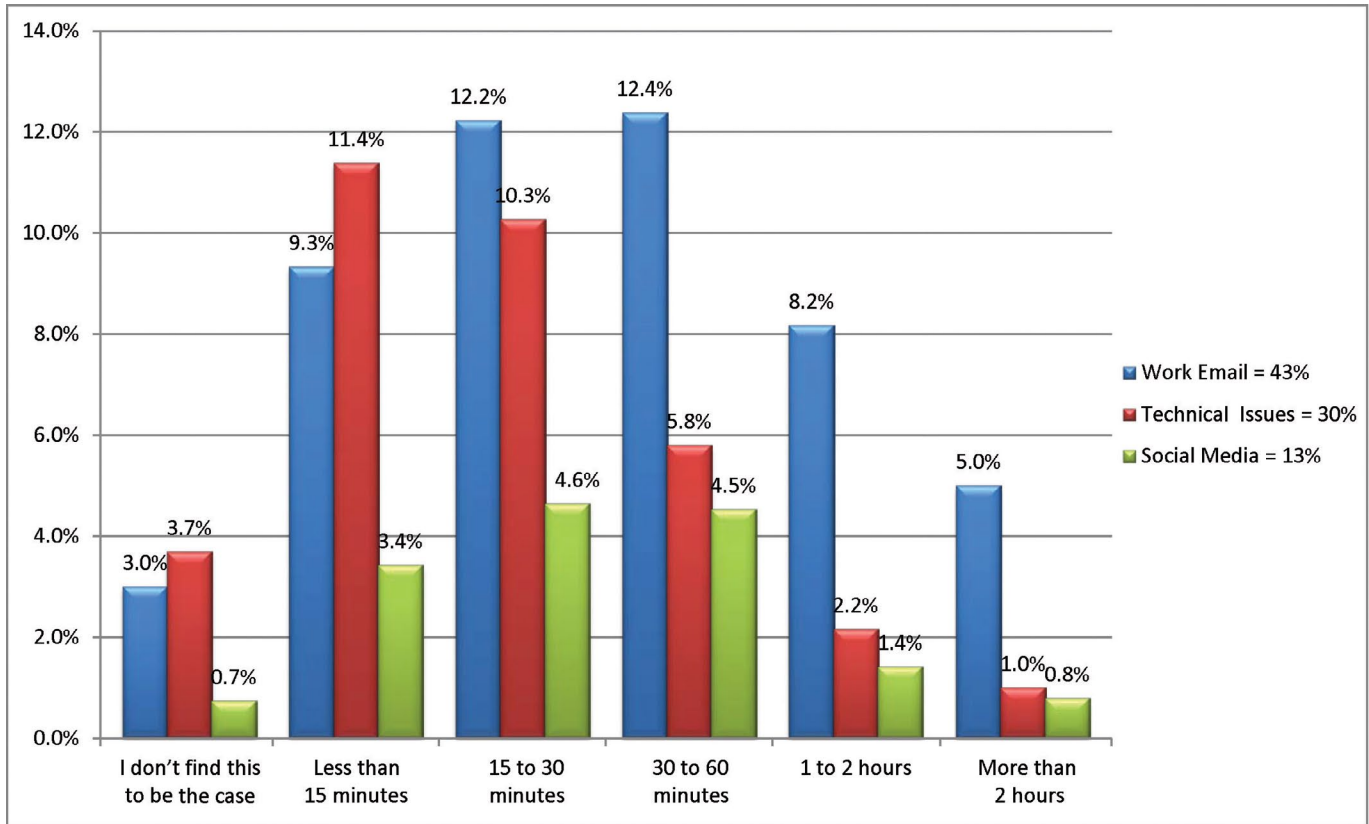


Figure 25. How much time do you waste on technology distractions (as defined above) during the workday? (technical difficulty)

When employees wasted time on technology distractions during the day, both their personal and professional life suffered. Productivity at work was the biggest individual cost (60 percent). 68 percent of mobile employees also found that their personal life suffered, including 26 percent who lost personal time, 18 percent spent less time with family and friends, and 15 percent couldn't exercise as often as they would like.

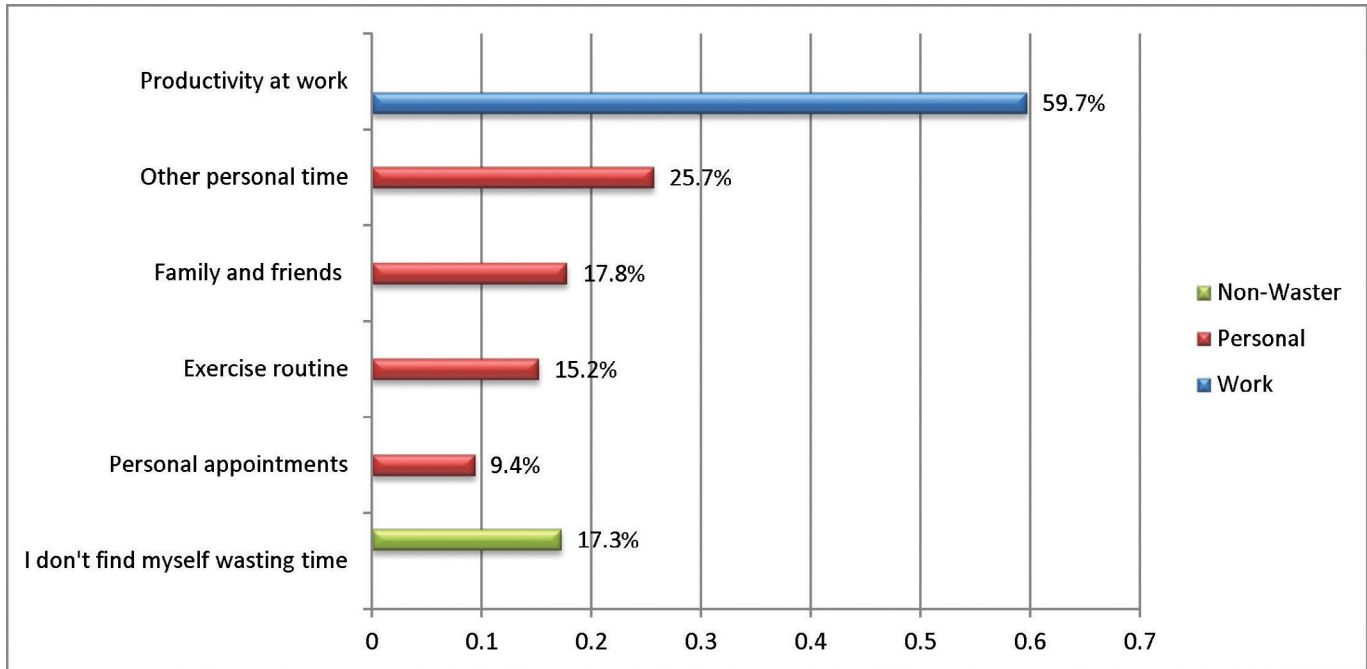


Figure 26. If you find yourself wasting time on technology distractions (as defined above) during the workday, what typically suffers as a result? (Check all that apply)

Technology issues not only wasted time for the mobile worker, but were also the biggest barrier to mobile working. 33 percent named network coverage outside the office as their biggest barrier, followed by access to applications on the go (25 percent). This proves, once again, that a gating factor to mobile work is the technology to enable employees to work mobile.

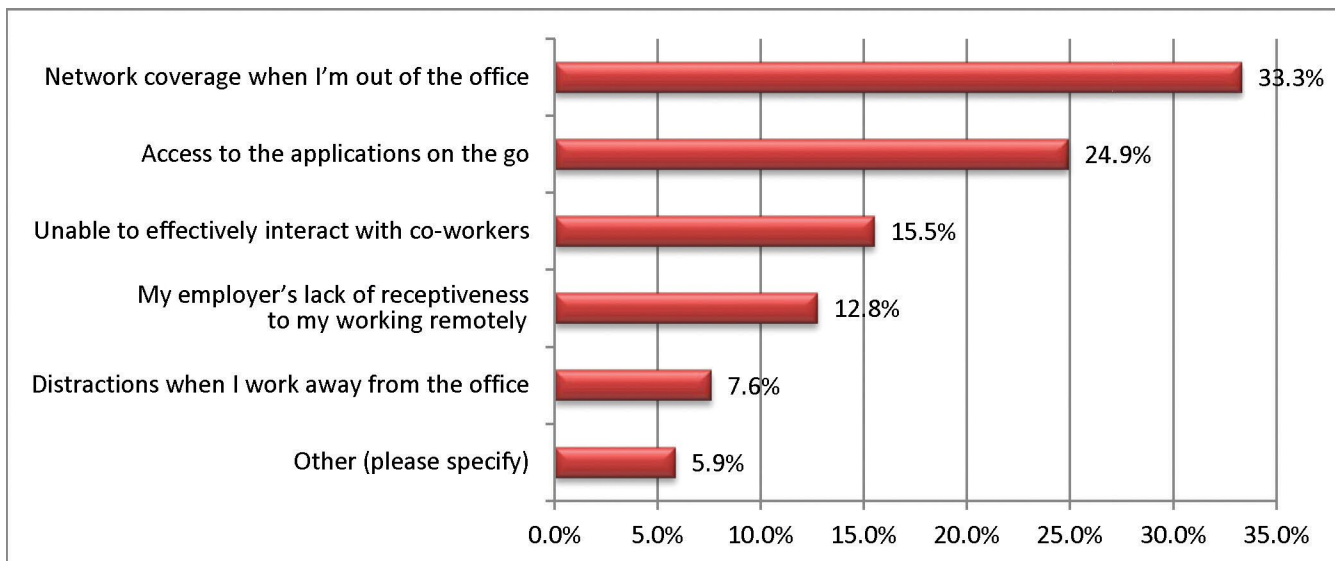


Figure 27. In your experience, what's the biggest barrier to successful mobile working?

Mobilocracy: Don't Call IT

While technology issues were the biggest time wasters and barriers to mobile work for mobile employees, one should not assume that they are technology luddites. Most mobile workers described themselves as highly proficient when it comes to technology (69 percent), compared to six percent who rated themselves as fairly proficient or non-proficient. This high level of proficiency is out of necessity. Members of this new mobilocracy have been trained in the consumer world and are power users of mobile technology.

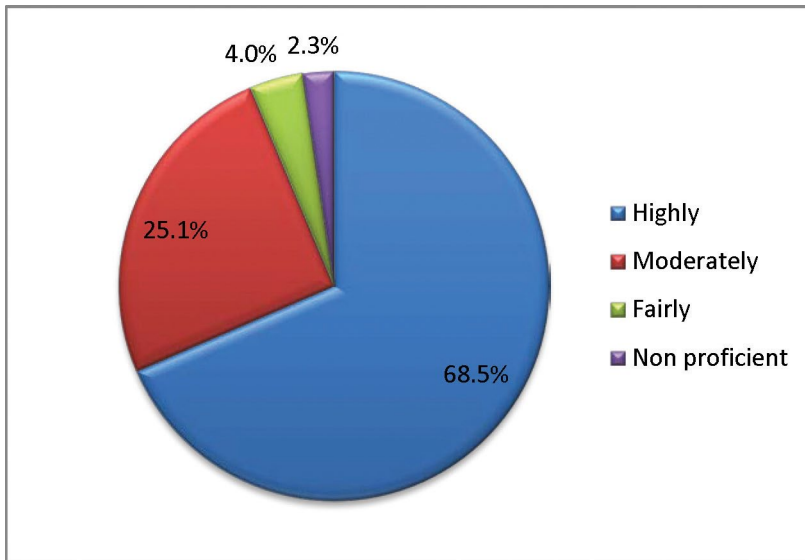


Figure 28. Do you consider yourself technically proficient when it comes to mobile technology?

Younger workers felt more technically capable, with 75 percent of those between age 22 and 34 stating they were highly proficient. These workers were weaned on technology, with almost all of the mobile tools they are using available to them at an early age. However, the big differences in technical proficiency existed mainly between those under 54 and those over 55.

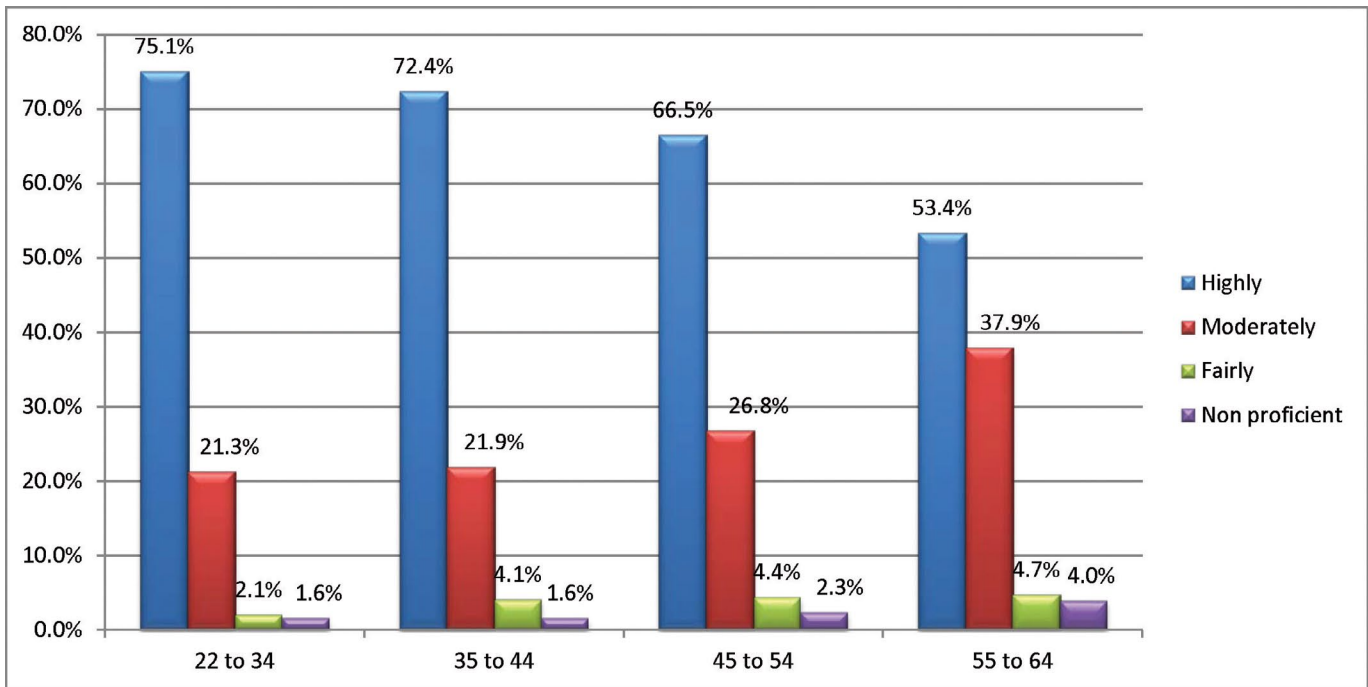


Figure 29. Do you consider yourself technically proficient when it comes to mobile technology?

And mobile workers only contacted IT as a last resort (81 percent), while two percent had IT on speed dial. Younger workers were far more likely to never contact the IT department with a technical problem, with 30 percent in the 22-34 age group, while only 12 percent responded this way in the oldest age group.

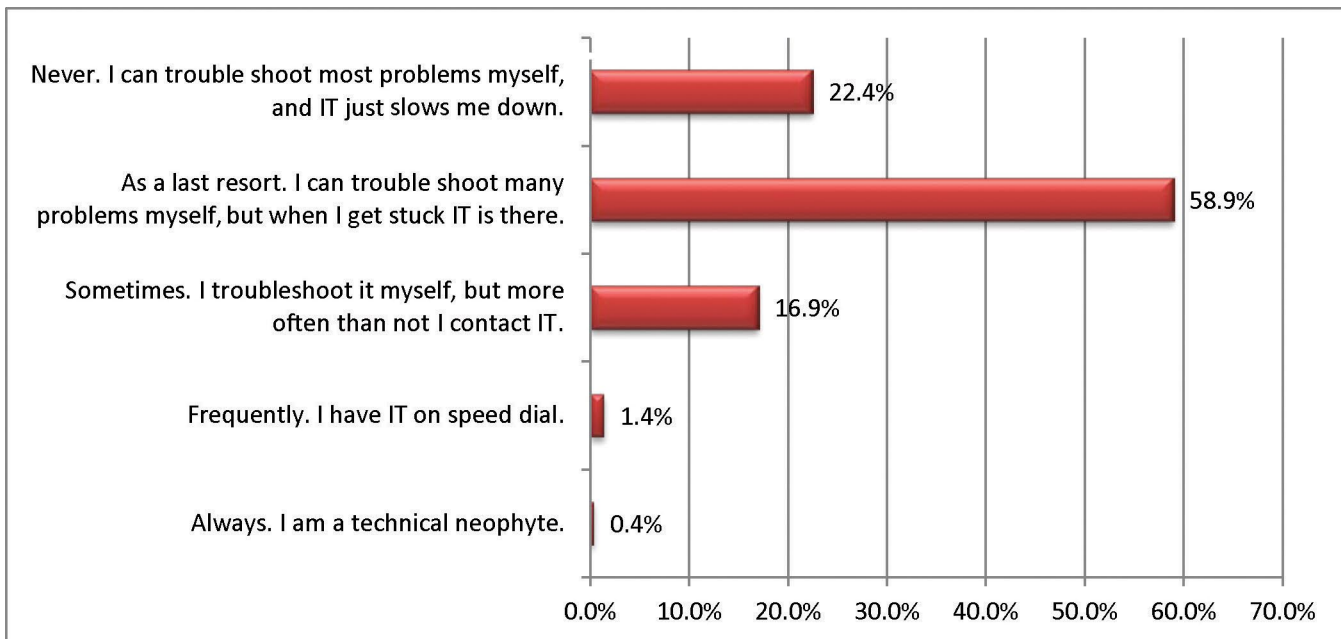


Figure 30. When do you contact IT with an issue?

And in the future, an optimistic 58 percent saw future mobility developments making technology easier and contributing to their increased proficiency, 39 percent thought this might happen, while three percent believed it will never be so or is unlikely.

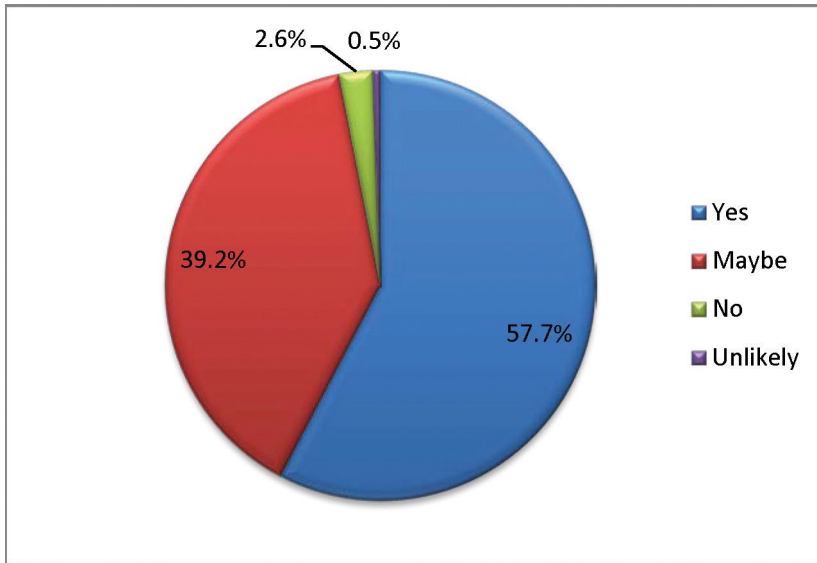


Figure 31. Do you think future mobility developments will make you more or less technically proficient when it comes to mobile technology?

Recommendations for IT

- Stop worrying about social media in the workplace. It is not as big a time waster as you thought. And those underperforming players that spend hours on social media will probably be managed out of a job when they do not meet their commitments. Social media can also help improve productivity, especially when it is used for employee self-service and troubleshooting.
- Focus on [removing technical barriers to mobile work](#), including connectivity outside the office and access to more corporate applications in the cloud.
- The fact is that while people are more self-sufficient; according to the [Mobile Enterprise Report](#), IT is reporting that their support needs are increasing. There is an opportunity for IT to invest in tools that help self sufficiency - like discussion boards at work that focus on mobile issues and support that enable employees to share ideas amongst themselves.
- As the mobile technology tsunami continues, mobile employees will be even more technically capable. Structure IT accordingly to address more difficult issues and leave the easy stuff to self-service portals and Wikis.



Conclusion

Today's mobile workers are proving to be a vital and capable part of nearly every company. Their commitment is outstanding, the mobile technology stack is an intimate part of both their work and personal environments, and they truly use them as productivity-boosters. Mobile employees are now able to choose their tools, and even to fix them when they break.

But a serious device dependency has developed. The majority of today's mobile employees would be lost and anxious without these tools, and they are constantly seeking new and better devices (e.g., tablets) to make their jobs easier. Yet work email and technology issues provide the biggest technology distractions for the mobile workforce.

Top 5 Predictions for 2012 and Beyond

1. As every knowledge worker adopts a [mobile stack](#) (the triumvirate of devices: smartphone, laptop, and tablet), the laptop will morph from a heavy, antiquated device, used only for desktop publishing and other back office applications, to include more lightweight tablet-like features. The real question will be if tablet innovation can push laptops out? Perhaps, but tablets have some room to grow for this to happen. Tablet and smartphone adoption and advancement will continue to be key drivers behind mobile employee behavior. Smartphones will supplant cell phones in enterprises (how embarrassing to be the last employee in your department without a smartphone). In 2012, as the tablet market will continue to explode, number two and three tablet manufacturers will emerge to challenge Apple.
2. Work and life will remain imbalanced, as mobile employees learn to manage the work/life blend. As the ranks of mobile employees rise, workshifting will be the norm, as well as longer workdays and hyperconnectivity. This will have physical and mental tolls on some employees. While most will figure it out, some will need professional help.
3. The role of IT will change drastically with the rise of the mobilocracy. Strategic IT roles will remain, however tactical roles like IT help desk will be outsourced. The cost of help desk support and connectivity will be pushed down to departments, and employees will be encouraged to troubleshoot issues themselves. IT should focus on providing the backbone (negotiating rates, ensuring access exists, and removing barriers) but not necessarily paying for that backbone.
4. The mantra in 2012 will be, "it's not where you work, it's what you do." Offices will stand empty as more employees workshift or telecommute. Employees will take advantage of more flexible work policies which will become standard at most businesses.
5. Mobile device liability will continue to shift to the individual. This will help grow the mobile workforce radically, and will help hasten the penetration of smartphones and tablets in the enterprise. Companies will take advantage of the mass deployment of these little computers among their workforce, and set policies to make it work for their own security and risk profile. At the same time, this could create an outcry from employees as data plans get more expensive and limited. Employees may pick and choose how they use their personal devices for work (for example, not watching that mandatory training video on their smartphone). This may lead to a requirement of more enterprise funding of individual liable devices as data access costs and data throughput requirements for mobile applications increase.



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iPass helps **enterprises** and **service providers** ensure their employees and customers will be well connected. Founded in 1996, iPass (NASDAQ: IPAS) delivers the world's largest commercial-grade Wi-Fi network and most trusted connectivity platform. With over 600,000 connection venues, iPass gives its customers always-on, frictionless connectivity anywhere in the world - easily, quickly, securely and cost effectively. Additional information is available at www.iPass.com or on **Smarter Connections**, the iPass blog.



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