The iPass Mobile Workforce Report

Understanding Enterprise Mobility Trends and Mobile Usage

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Executive Summary

Recent advances in mobile device technology and broadband connectivity are driving the growth of the mobile enterprise workforce. Sophisticated and affordable new smartphones and other mobile devices, faster connectivity, as well as the advent of Software as a Service (SaaS) have all shifted the connection point from the corporate network to the off-campus hotspot, making mobile working much simpler, faster, and more cost effective.

But new technology advances are not the only drivers causing the rapid growth in mobility. There are several cultural shifts and changes in employee usage patterns that are having as much or more impact than the many technical advances. Employees are now logging in more frequently, from more locations, from an ever-increasing array of different devices.

There has also been a dramatic move away from a manufacturing-led economy to one which is heavily service-driven over the last twenty years or more. This evolution has led to a shift in the world's workforce from the production line into the office. Flexible work is the norm, not just in usage, but acceptance, even for traditionally office-based workforces such as government employees.

The Quarterly iPass Mobile Workforce Report reveals the behaviors of the mobile employees and identifies common characteristics to segment users into five categories: mobile minimalists, mobile minority, mobile majority, mobile masters, and mobile maniacs. The iPass Mobile Workforce Survey conducted as part of the report asked mobile employees what technologies provided a gain or a drain to their productivity, how often they were checking their smartphones during downtime, how often they worked from home, and if mobility influenced their work/life balance.

Methodology

The Quarterly iPass Mobile Workforce Report includes enterprise mobile broadband usage data collected by iPass across its user base of employees at 3,500 enterprises from January 1 through March 31 of 2010. It also summarizes the responses to a survey by more than 1,400 mobile enterprise employees between April 26 and May 7, 2010. The survey respondents were asked about their mobile productivity, work habits, and tele-commuting experiences.

Segmenting the Mobile Workforce

The U.S. Bureau of Labor Statistics estimated the average workday at 8.8 hours in 2008. The Quarterly iPass Mobile Workforce Report found the average workday for mobile workers is one hour longer, closer to 10 hours a day. Using the new average workday as the starting point, data was grouped, and mobile employees were segmented into three categories:

- **Mobile Masters** (34 percent of respondents) worked 55 hours or more a week. They telecommuted more frequently than the other segments (62 percent telecommuted at least one day a week). They saw no productivity costs from mobile technology, but 13 percent did see a negative impact on work/life balance. Mobile maniacs (30 percent) and mobile masters (25 percent) were also more likely to see social media as positively contributing to workplace productivity.
- **Mobile Majority** (47 percent of respondents) most represent the mobile population at large. They worked 45 to 55 hours a week; in line with modern workday averages.
- **Mobile Minority** (18 percent of respondents) worked 40 or fewer hours a week, and are most likely to go into the office every day, and less likely to telecommute. In fact 19 percent did not telecommute at all. For this group, mobile technology does provide productivity gains, it also enables personal freedom. Almost half saw mobile technology as enabling more work/life balance, although 23 percent admitted to not checking their smartphone during downtime.
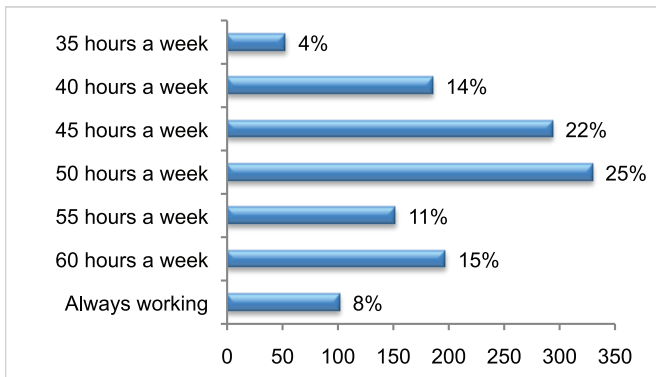
Figure 1. How many hours per week do you typically work?

Figure 2. How productive does mobile technology make you?

The report also identified two additional segments of mobile employees:

- **Mobile maniacs** (6 percent of respondents) are those that admitted that they check their smartphones obsessively during downtime. Fifty-four percent of mobile maniacs worked more than 60 hours a week. 23 percent see a negative impact on their work/life balance due to mobile technology.
- **Mobile minimalists** (12 percent of respondents) are those that admitted that they don't check their smartphone during downtime. Thirty-seven percent of mobile minimalists worked 40 hours a week or fewer. 40 percent of mobile minimalists saw a positive impact on their work/life balance due to mobile technology.

Mobile Workforce Survey Results

Mobile Technology Is a Must for Employee Productivity

For an increasing number of professionals, mobility is essential. Recent advances in sophisticated and affordable mobile devices, faster connectivity, as well as cloud computing have enabled employees to be far more effective and productive while on the move.

According to the survey, 93 percent of respondents believed mobile technology made them more productive. Only 5 percent saw no influence from mobile technology on their productivity, and just one percent felt less productive because of mobile technology. The mobile masters were more likely to feel that mobile technology made them much more productive (80 percent) compared to the mobile maniacs (77 percent), mobile majority (67 percent) and the mobile minority (49 percent). Alternately, the mobile minority (14 percent) were more likely than the mobile majority (6 percent), the mobile maniacs (6 percent), and the mobile masters (4 percent) to see mobile technology as either having no influence on productivity or making them less productive:
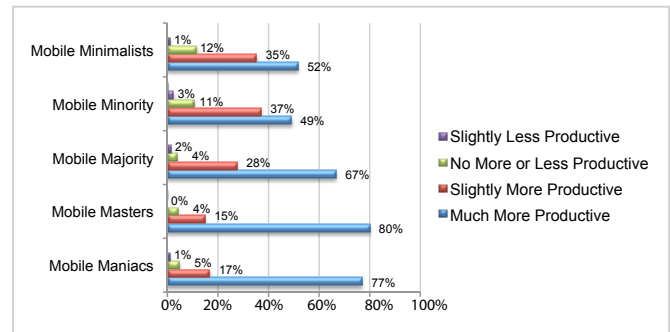
Productivity Comments

Comments from the survey included:

"I am able to check email from anywhere for work or personal, so when something comes up that takes me away from my desk I can stay on top of it."
- Sales manager, tech company

"I can find the answers to questions quickly, be aware of problems and issues right away, and at least be thinking about solutions. Oftentimes I can speed processes by quickly approving things or delegating work on the go."
- Manager, large bank

"The flexibility offered by mobile solutions means that you have the opportunity to deal with things as they arise. You do not have to wait until you get to your destination to deal with work."
- IT, large bank

"I am able to VPN into work when I am working out on the street. If I had to come back into the office every time I needed to do remote work, I would only get half the work done."
- Network engineer, Transportation Company

"Mobile technology gives me the ability to keep in touch with my team more effectively and get immediate responses to critical emails, thus providing solutions in half the time."
-IT manager, pharmaceutical company

"Having the ability to respond when on the go, rather than having to fire up my computer, allows me to respond quickly rather than having to address an accumulation of email and messages upon my return to the office."
- Operations supervisor, retailer

Email and Phones Still Primary Tools; Social Media Considered Productivity Drain

Tools that contributed positively to employee productivity included email (85 percent), telephones (75 percent), text messaging (67 percent), and instant messaging (66 percent). Mobile employees were fairly evenly split on the value of meetings (54 percent) and travel (48 percent) to their productivity. And despite its recent rise in popularity, 78 percent of mobile employees saw social media as drain on their work productivity:
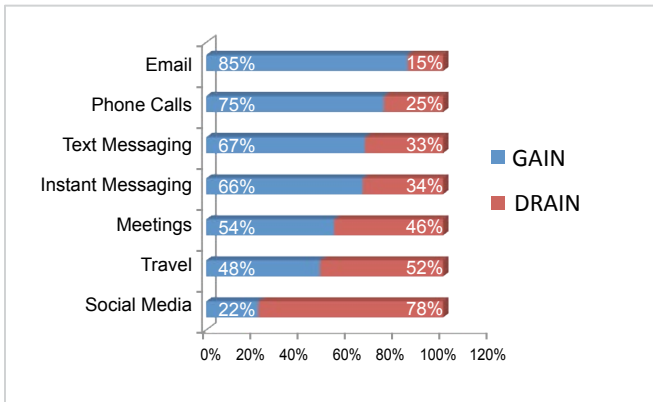

Figure 3. Do you view these are a drain or gain to your productivity?

Mobile maniacs (30 percent) and mobile masters (25 percent) are more likely to see social media as a productivity gain versus the mobile majority (20 percent) and the mobile minority (22 percent):
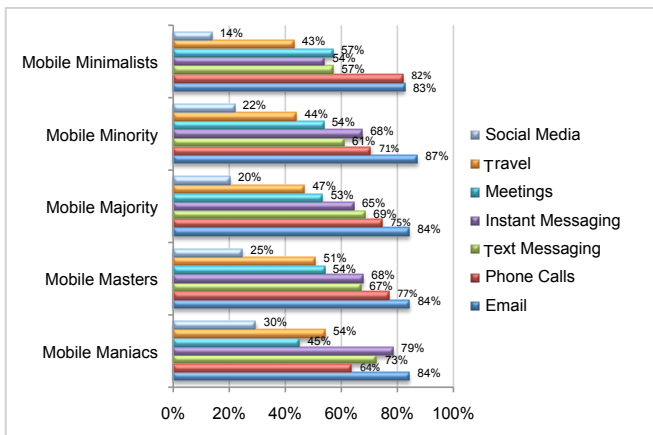

Figure 4. View these as a gain to productivity by hours an employee works

Technology Productivity Comments

"Mobile technology allows me to prioritize tasks, rather than spend time responding to tasks that are not urgent... but the owner of the problem can get hold of you when they need to (e.g., phone). It also saves me tons of travel time (both overseas and locally)."

- Business analyst, mining and exploration

"Being connected makes it possible to resolve situations quickly, develop ideas, and make things happen when needed. On the other hand, it increases everyone's email traffic, sometimes without so much purpose."

- University professor

More Employees are Telecommuting

The iPass survey also found that mobile employees are not only working longer hours, they are also more likely to telecommute. More than half (54 percent) of mobile employees worked from home at least one day per week. Mobile masters (62 percent) are more likely to work from home at least one day a week, than mobile maniacs (55 percent), the mobile minority (51 percent), and finally the mobile majority (50 percent). Almost 20 percent of the mobile minority did not telecommute at all:
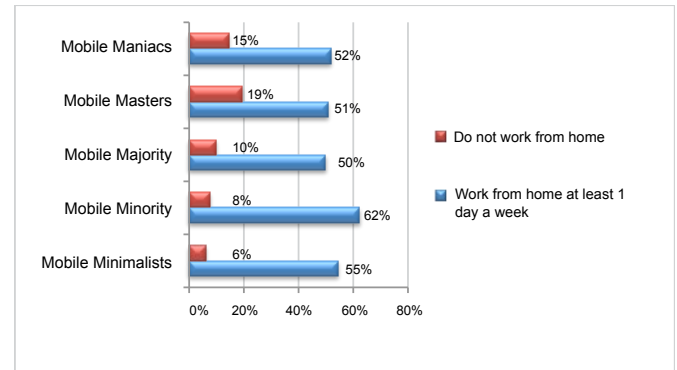
Figure 5. Do you work from home? If so, how many hours per week?

Telecommuting Comments

"Working from home eliminates my travel time, so if I am working on an issue I continue until completion. Figure I would have been on the road anyway. So more productive..."

- Accounting, large consumer packaged goods company

"As someone who telecommutes most of the time, all I need to work is a solid Internet connection. Having a connection available when I am away from home means I can work from anywhere."

- Editor, academic book publisher

Employees Are Becoming Addicted to their Mobile Devices

According to the iPass survey, mobile employees are committed communicators. 88 percent are checking their smartphones during downtime, 55 percent do it usually, and 6 percent (mobile maniacs) admitted to checking their smartphones obsessively. For the mobile masters 10 percent check their smartphone obsessively, 61 percent do it usually, while 23 percent of the mobile minority admit to never checking their smartphone during downtime.
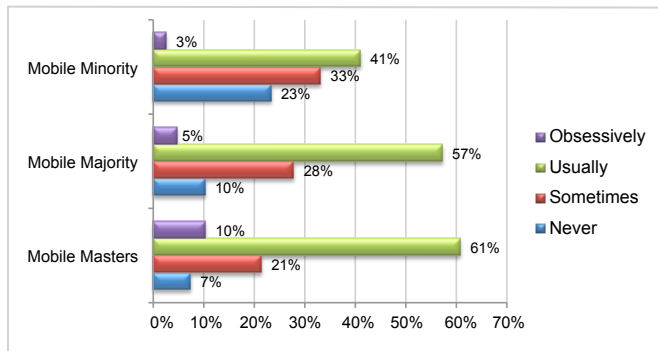
Figure 6. Do you check your smartphone during downtime?

Smartphone Comments

"The convenience of retrieving and responding to emails while not in front of the computer enables quicker response time, resulting in more productivity."

          - Project manager, large bank

"My smartphone allows me to check email and keep track of colleagues in Europe and Asia offices after hours, versus waiting until the next work day."

          - Marketing engineer, electronics company

Mobile Devices Can Improve the Work/Life Balance

The iPass survey also asked mobile workers if mobile technology had any effect on their work/life balance. Only 11 percent saw mobile technology as a detriment to their work/life balance, while 35 percent thought it gave them more work/life balance. Most mobile employees (44 percent) thought it was situational, sometimes helping with work/life balance and other times hindering it.

Mobile maniacs (23 percent) were more likely to see mobility as a detriment to their work/life balance compared to mobile masters (13 percent), the mobile majority (11 percent), and the mobile minority (5 percent).

The mobile minority are more likely to claim improved work/life balance due to mobile technology (46 percent), compared to the mobile majority (34 percent), mobile masters (32 percent), and mobile maniacs (25 percent):
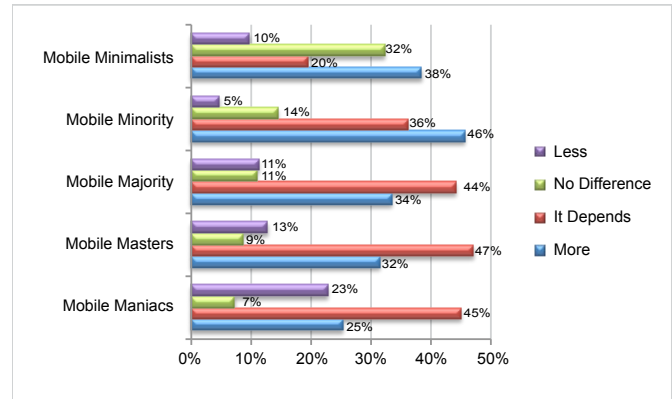

Figure 7. Does mobile technology give you more or less work/life balance?

Work/Life Balance Comments

"Without mobile communication, I could not work effectively. With it, I can work flexibly from home or virtually anywhere which allows me to fulfill my role as a father and husband better and, amazingly, I can achieve the extended working day required to support my job. My job involves dealing with people as far flung as Hong Kong and Vancouver - with the countries in-between - on an almost daily basis; this role does not fit at all with a 9-5 office-bound approach."

          - Systems manager at a large bank

"When I first learned how to use a Palm Pilot in the late 90's, technology has been my friend. I can get so much more done, in less time. This allows me to either 1) get a lot more done in the same time as others, or 2) get all my work done and relax more."

          - Director, manufacturer

"I can work from home, airports, Starbucks, and hotels when traveling. It gives good balance between work and family time."

          - Engineer, chemical company

iPass Mobile Usage Data

In stark contrast to the highly mobile employees that responded to the survey, iPass mobile usage data collected from January 1 through March 31 of 2010 indicated that while employees were working from home – for more than 53 percent it was less than two times a month. However, 28.3 percent logged in from home at least once a week, and approximately 16 percent logged in at least twice a week:

	<2 times	2-5 times	5-10 times	10-15 times	15-20 times	>20 times
Q1 2010	53.2%	18.6%	12.3%	7.2%	5.4%	3.4%
Q4 2009	51.3%	19%	12.8%	7.4%	5.6%	3.8%

Figure 8. Average number of times mobile workers logged in from home per month during the fourth quarter of 2009 and first quarter of 2010. (Results are based on 500K users and 7.5M user sessions.)

Mobile workers had a slight increase in days on the road in the first quarter of 2010. The majority (68.4 percent) traveled between one and five days per quarter, but over 13 percent were on the road for six or more days during the quarter:

	<1 day	1-5 days	6-10 days	11-15 days	16-20 days	> 20 days
Q1 2010	18.3%	68.4%	9.4%	2.4%	<1 %	<1%
Q4 2009	19%	71%	8%	2%	<1%	<1%

Figure 9. Number of days mobile workers who traveled were on the road in the fourth quarter of 2009 and the first quarter of 2010. (Results are based on 250K users and 1.3M user sessions.)

Mobile employees had more connectivity sessions during the first quarter of 2010 than in the fourth quarter of 2009 at hotels, airports, retail locations, restaurants, and convention centers. Hotels continued to be the most popular place to log in when on the road followed by airports, but mobile workers logging in from convention centers tended to connect for longer sessions:

	Q1 2010 Sessions per 100 workers	Average Session Length (minutes)	% Total	Q4 2009 Sessions per 100 workers	Average Session Length (minutes)	% Total
Hotel	287.1	90.9	41.6%	243.7	91.5	42.6%
Airport	187.5	33.6	27.2%	155.6	32.6	27.2%
Retail	137.9	52.3	20%	97.3	55.9	17%
Restaurant	65.4	45.1	9.5%	58.1	46	10%
Convention Center	3.6	131.7	0.5%	2.9	107.4	0.5%
Other	7.8	39.9	1.1%	14.4	52	2.5%

Figure 10: Locations and length of time for employee logins. (Results based on 250K users and 1.9M user sessions.)

Frankfurt led the list of airports, with 5.6 percent of mobile employee logins in Q1 of 2010. In fact, European airports held the top three spots, indicating that large companies are relaxing restrictions on International business travel:

Q1 10 Top 20 Airports Worldwide	Sessions per 100 Workers	Average Session Length (min.)	% Total	Q4 09 Top 20 Airports Worldwide	Sessions per 100 Workers	Average Session Length (min.)	% Total
1. Frankfurt	10.5	50	5.6%	1. O'Hare (Chicago)	9.4	32	6.1%
2. Charles de Gaulle (Paris)	10	27	5.3%	2. Frankfurt	8.5	48	5.5%
3. Heathrow (London)	8.9	33	4.7%	3. Charles de Gaulle (Paris)	7.9	28	5.1%
4. Dallas Fort-Worth	7.6	29.3	4.1%	4. Dallas-Fort Worth	6.1	29	3.9%
5. O'Hare (Chicago)	7.5	32	4%	5. Minneapolis-St. Paul	5.8	31	3.8%
6. Schiphol (Amsterdam)	7.3	29.7	3.9%	6. San Francisco	5.8	30	3.7%
7. San Francisco	7.3	31	3.9%	7. Schiphol (Amsterdam)	5.5	28	3.6%
8. Munich	6.5	31.1	3.5%	8. Hartsfield (Atlanta)	4.5	41	2.9%
9. Minneapolis- St. Paul	6	31.1	3.2%	9. Heathrow (London)	4.1	33	2.6%
10. Hartsfield (Atlanta)	5.7	43.1	3%	10. Munich	4	39	2.6%
11. Zurich	5	26.1	2.7%	11. Zurich	4	27	2.5%
12. Detroit Metro	4.5	32	2.4%	12. Brussels	3.3	30	2.1%
13. Brussels	4.1	31.7	2.2%	13. Los Angeles	3.1	32	2.0%
14. Los Angeles	3.6	32	1.9%	14. Detroit Metro	3	30	1.9%
15. Houston Intercontinental	3	30.7	1.6%	15. Houston Intercontinental	2.4	31	1.5%
16. Madrid	2.6	34.2	1.4%	16. Newark	2.1	34	1.4%
17. Stockholm	2.6	29.6	1.4%	17. Stockholm	2.1	27	1.4%
18. Newark	2.3	34.7	1.2%	18. Tokyo Narita Chiba	1.8	25	1.1%
19. Tokyo Narita Chiba	2.2	27	1.2%	19. Geneva	1.7	24	1.1%
20. Geneva	2.1	25.9	1.1%	20. Logan (Boston)	1.5	35	1.2%

Figure 11. Number and percentage of employee logins by airport. (Results are based on 250K users and nearly 500K user sessions.)

Conclusion

The Quarterly iPass Mobile Workforce Report found that mobile workers are increasingly reliant on their smartphones, with most workers checking their smartphones frequently, and an emerging group admitting that they check their phones obsessively. iPass predicts that with the introduction of useful and engaging mobile devices like the iPad, the number of employees that check obsessively will only increase. The iPass research also found that in contrast to declarations by pundits such as John Dvorak, email is not dead. Consistently across all segments of mobile workers (85 percent), email is considered a contributor to productivity and not a detractor. And finally, social media is a drain on mobile workers productivity across all user segments: despite the hype, most workers (78 percent) see it as a drain on their productivity.

iPass Recommendations

Enterprises need to accept the fact that every enterprise employee is now a potential mobile user. But excess fragmentation in the number and types of devices is making it impossible for the enterprise to manage and support them all.

Every week, new consumer mobility products and services are announced, with technology and features changing overnight. Inevitably, many of these new products will creep into the office – if they are not there already. And if corporate management stands in their way, employees will find ways to work around the enterprise's device and connectivity restrictions.

Instead, organizations now have the opportunity to embrace mobility. Mobile workers are quite often the enterprise's best and most productive employees – the technical support engineer that works with a customer late into the night, the sales representative who brings in the big numbers at the very last minute of the quarter, the consultant that collaborates with colleagues after a full day with a client, and the financial whiz who always gets the numbers right – even while on the road.

Enterprises must also understand that there are different segments of mobile workers. Policy and mobile technology cannot be offered in a one-size-fits-all approach. The mobile masters have different needs and style of working than the mobile minority. It is essential to understand the importance of segmenting users – by different needs, behaviors, expectations, productivity drivers, and other differentiators.

It is also important to note that embracing mobility does not mean settling for a weakened security posture for your organization. Enterprises need to take a close look at their overall security policies and evaluate how they can adapt them based on your segments of mobile users. IT should consider providing different levels of mobile access based on who the user is, the type of device they use for access, and the sensitivity of the information they have access to. And finally the enterprise needs to ensure its security and mobility policies are not only in place, but well communicated to all employees.

The world is now moving into an age where all enterprises will need to embrace their mobile workforce. The technologies for enabling and securing the mobile workforce are here. Enterprises need to give their workers the tools they want and need to succeed, accepting and addressing the challenges presented by the increasingly mobile workforce. Devices and access methods leveraged matter less; the solutions in place to control the chaos, are of infinite more value and necessity.

About iPass

Founded in 1996 iPass (NASDAQ:IPAS) is a leading provider of enterprise mobility services with over 3,500 customers, including more than 370 of the Forbes Global 2000. The company's mission is to be the voice of the enterprise in the market for mobility services by providing solutions that simply, smartly and openly facilitate access from any device on any network, while providing the visibility and control necessary to contain spiraling mobility costs, maximize mobile user productivity and maintain security in a world where consumers drive enterprise IT.

For more information, visit **www.iPass.com** or follow iPass on Twitter at **www.twitter.com/iPass**

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