The iPass Global Mobile Workforce Report

Understanding Enterprise Mobility Trends and Mobile Usage
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The iPass Global Mobile Workforce Report
UNDERSTANDING ENTERPRISE MOBILITY TRENDS AND MOBILE USAGE

Executive Summary
Social boundaries are being redrawn and polite society is changing yet again. This quarter’s Mobile Workforce Report reveals where the lines are being drawn between life and work – separating personal from business time.

Highlights of this quarter’s study include:
- 41 percent of mobile workers have a tablet and an additional 34 percent of mobile workers intend to purchase a tablet in the next six months.
- 87 percent of mobile workers that own tablets use their tablets for at least some work. Among tablet owners, 27 percent have a tablet provided by their workplace and 73 percent have a personally owned tablet.
- The average mobile worker works 240 hours a year longer than the workforce in general.
- On the road, 68 percent of mobile workers will pay for a faster connection at a hotel even when a free network is also available.
- 43 percent of mobile workers store their smartphone within arm’s reach when they sleep at night. Those that do this are 60 percent more likely than average to wake during the night to check their smartphone.
- Those living in Asia Pacific are the least rested with 55 percent of mobile workers waking at least occasionally to check their smartphone or tablet, and 19 percent wake every night. Europeans are the most rested with only 27 percent waking at least occasionally, and 4 percent waking every night.
- 29 percent of mobile workers find that their mobile technology usage causes friction in their personal relationships, specifically with their significant other or spouse.
- When mobile workers wake up in the morning, 35 percent check email before anything else, including getting dressed or eating breakfast.

Among mobile employees, the top-five business applications for the smartphone or tablet beyond email are:
- Note taking applications (47 percent)
- Contract or contact management (39 percent)
- Office suites (33 percent)
- Social media for work (30 percent)
- Web conferencing (25 percent)
- 94 percent of mobile workers have a smartphone today.

Introduction
When you sleep, where do you store your smartphone? The answer to this question says a lot about what kind of mobile worker you are.

Most mobile workers are frequently connected, highly responsive, and ready to be engaged outside of traditional office hours. Their mobility helps them stay competitive in a fast-paced and challenging business environment. They work longer hours than the workforce in general – 240 hours more per year to be exact. Work does not keep the majority of mobile workers up at night, and their mobility does not cause friction in their personal relationships, since more than half store their smartphone out of arm’s reach.

Some mobile workers can be defined as hyperconnected (on call 24 hours a day, ready to check email or collaborate with a colleague in any time zone) and many are experiencing the downside of an always-on, always-connected lifestyle. Surprisingly, it is not the road warriors (those who travel more than one month a year). It is a portion of the 43 percent who sleep with their smartphone within arm’s reach who exhibit many of the behaviors of the hyperconnected worker.

For those who keep their smartphone close at hand at night, they are 60 percent more likely than the average mobile worker to wake during the night to check their smartphone. The number one reason for doing this is because their smartphone pings. They are 65 percent more likely to check their smartphone obsessively during downtime, and they are 10 percent more likely to report that their mobile technology usage causes friction in their personal relationships — typically with a
spouse or significant other.

Today’s mobile workforce is diverse and highly productive. In this report, we will highlight many of these social boundary issues as the mobilocracy continues to grow within businesses. In the last year, we have seen smartphone adoption grow to 94 percent of the mobile workforce. Our survey also demonstrated significant tablet adoption among mobile workers; today 41 percent have a tablet, and that number is projected to grow to 75 percent within six months. We have also seen an increase in the number of individuals who admit to obsessively checking their smartphones during downtime, as well as a slight decline in the number of road warriors.

**Methodology**

This quarter’s iPass Mobile Workforce Report is based on information from more than 3,700 responses to an iPass survey of mobile enterprise employees at over 1,100 enterprises worldwide. The survey was conducted between April 1 and April 15, 2011, and represented employees across multiple age groups and geographies. The survey respondents were asked about their mobile productivity, work habits, and related experiences.

![Location Breakdown of iPass Survey Respondents](image1.png)

**Figure 1: Location breakdown of iPass survey respondents**

![Age Breakdown of iPass Survey Respondents](image2.png)

**Figure 2: Age breakdown of iPass survey respondents.**
**iPass Mobile Employee Definition:** Any worker using any mobile device (including laptop, netbook, smartphone, cellphone, or tablet) who accesses networks (other than the corporate LAN or WLAN) for work purposes.

**Mobilocracy Definition:** 1) the mobilocracy is a powerful class of worker who relies on mobile devices for greater productivity; 2) the common worker, esp. as a mobile workforce. Within corporations, the mobilocracy increasingly plays a larger role in IT decisions and directions.

**Redefining Social Boundaries**
“Silence your cell phones!” The battle hymn of the 90s played in office building waiting rooms, in movie theaters, and on public transportation. With the emergence of smartphones and web-enabled cell phones – the activities of checking email, surfing the web, texting, or using an application like Facebook or Twitter are much less obtrusive – but still potentially annoying. Ever try to have a conversation with someone engrossed in their smartphone? Or started checking your email to mentally check out of a dreadfully boring meeting? The rules are being rewritten, and mobile workers have an opinion on what is acceptable and what is unacceptable behavior. At the same time, nearly 90 percent of mobile workers admit to having engaged in at least one of the behaviors they find unacceptable.

Social boundaries are not only defined by how polite society behaves, but where the lines are drawn between personal and public, life and work. The smartphone and tablets are highly personal devices and occupy our free time in increasing amounts. In fact, 91 percent of mobile workers check their smartphone during downtime, and 61 percent store it somewhere in their bedroom — most within arm’s reach. Smartphones and tablets give us the ability to check email as soon as we wake up in the morning. 76 percent of mobile workers do so before starting the commute or entering their office. And for many, smartphones and tablets keep us up at night, with gentle pings letting us know that the rest of the world has not gone to sleep.

In this section, we will examine smartphone and tablet penetration, how often mobile employees check their smartphones during downtime, where people store their smartphones and tablets at night, and what mobile employees think is acceptable and unacceptable behavior. But first, we will look at work and productivity.

**What works for you**
The number of hours worked by the mobile workforce has not changed much between 2010 and 2011. The average mobile worker still works 240 hours per year longer than the workforce in general. 42 percent work less than 50 hours a week, compared to 41 percent in 2010. 58 percent work more than 50 hours a week, compared to 59 percent in 2010.

Mobile workers living in North America claim to work longer hours. 65 percent claim to work 50 hours per week or more, and only 50 percent of those in Europe and 49 percent of those in Asia Pacific claim to work 50 hours per week or more.

Overall, 86 percent of mobile workers telecommute, down just a few percentage points from 88 percent in 2010. Europeans telecommute the most at 91 percent, followed by 90 percent of those living in Asia Pacific, and only 81 percent of those living in North America. The top day to telecommute worldwide is Friday with 22 percent of mobile workers telecommuting, followed by Monday with 18 percent of mobile workers.
With the flexibility of telecommuting, employers realize less impact to productivity during times of severe weather or emergency situations. 81 percent of mobile workers telecommute when external causes keep them from getting to the office, and only 3 percent do not work from home at all. A small group of 17 percent will still try to go into the office anyway.

**Stacking the mobile stack**

Smartphones have reached close to 100 percent penetration among mobile workers. Across the generations, 96 percent of mobile workers under the age of 45 have a smartphone and 91 percent of those over the age of 55.

Relatively new on the market, tablets continue to be the big story of 2011. Currently, 41 percent of mobile workers have a tablet and an additional 34 percent of mobile workers intend to purchase a tablet in the next six months. Taken together, we expect to see 75 percent of mobile workers with a tablet this fall.

Among tablet-owning mobile workers, iPads dominate with 72 percent of the current market share in this study. It looks like this will remain the case this year with 63 percent of mobile employees indicating that they plan to purchase or receive an iPad 2 in the next six months, bringing the potential future market share for iPads to 71 percent of tablet-carrying mobile workers.
Tablets continue to have huge work appeal to mobile workers. 87 percent of mobile workers that own tablets use their tablets for at least some work. Among tablet owners, 27 percent have a tablet provided by their workplace, and 73 percent have a personally owned tablet.

Downtime is smartphone time
Downtime is personal time or “me-time”, when you are waiting for something or otherwise not occupied. And during downtime, 91 percent of mobile workers check their smartphone, up from 86 percent in 2010. More than 7 percent of mobile workers admit to checking their smartphone obsessively, up from nearly 6 percent in 2010.
Figure 7: Do you check your smartphone during downtime?

When you look at downtime by generation, overall those 35 to 44 are most likely to check their smartphone at least occasionally (94 percent) during downtime. And those 34 and under are most likely to admit to checking their smartphone obsessively.

Figure 8: - Do you check your smartphone during downtime? [By age]

**Sleeping with the smartphone**

One of the surprises of the survey is the causal relationship between sleeping with your smartphone and hyperconnected workaholic behaviors. It seems to relate that when your smartphone is close at hand, it is more tempting to
check it when you wake in the middle of the night. According to our survey, 43 percent of mobile workers store their smartphone within arm’s reach when they sleep at night. 27 percent store it in a specific place elsewhere within their house. 12 percent of mobile employees who keep their smartphone within arm’s reach at night check their smartphone obsessively, compared to 7 percent of the overall mobile worker population.

Figure 9: When you go to sleep at night, where do you store your smartphone?

Figure 10: When you go to sleep at night, where do you store your smartphone? (By age)
When looking at tablet owners, nearly 31 percent store their tablets in a specific place elsewhere within their house when they sleep at night; over 25 percent store it within arm’s reach.

Figure 11: When you go to sleep at night, where do you store your tablet?

While the majority of mobile workers do not wake during the night to check their smartphone or tablet, 38 percent wake at least occasionally and 8 percent wake every night. More than half of those who sleep with their smartphone within arm’s reach wake at least occasionally to check their smartphone (58 percent), and 11 percent wake every night.

Figure 12 - How often do you wake during the night to check your smartphone/tablet?

Mobile workers age 34 and under wake most often to check their smartphone or tablet during the night. 46 percent wake at least sometimes, and 10 percent wake every night.
Those living in Asia Pacific are the least rested with 55 percent of mobile workers waking at least sometimes to check their smartphone or tablet, and 19 percent waking every night. Europeans are the most rested with only 27 percent waking at least sometimes, and 4 percent waking every night.

The primary reason for waking to check their smartphone (47 percent) is for work (work with people outside the country; don’t want to miss anything; or they’re working on something important that requires their immediate attention). Mobile workers also wake to check their smartphone “because it pings” (36 percent) and “because I can’t sleep” (36 percent). The group that wakes for work the most are those age 45 to 54, where 76 percent of those that wake to check their smartphone or tablet do so for work. Waking for work is also rampant among those living in Asia Pacific, where 61 percent wake for work.
Figure 15 - Why do you wake during the night to check your smartphone/tablet?

Woke up, fell out of bed... checked email
When mobile workers wake-up in the morning, 35 percent check email before anything else, while 16 percent wait until they start their workday [once they get to the office] before checking email. Among mobile workers who sleep with their smartphone within arm’s reach, 53 percent check email first thing every morning before they do anything else.

Figure 16 - When you wake in the morning when do you first check your email?
The younger the worker, the more likely they will check email first thing in the morning before they do anything else. 44 percent of those age 22 to 34 check email first thing, and 39 percent of those ages 35 to 54. In contrast, 24 percent of those over the age of 55 don’t check email until they start their workday.
Mobile manners and interpersonal relationships

29 percent of mobile workers find that their mobile technology usage causes friction in their personal relationships. Mobile technology usage causes the most friction for those age 35 to 44 (32 percent). Similarly, for those who sleep with their smartphone within arm’s reach, 32 percent see their mobile technology causing friction in their personal relationships.
For 90 percent, the friction is with their significant other or spouse; for 21 percent it is with their children. For those ages 22 to 34, friends outweigh children in the friction department at 17 percent to 10 percent. The most common complaint was that when they are engrossed in their mobile technology, others feel they are not paying attention to what is happening around them.

Figure 19 – With whom does your mobile technology usage cause the most friction? (By age)

Mobile workers find the following behaviors unacceptable:

- Taking a call on a smartphone or a cellphone during a meeting (84 percent find it unacceptable)
- Checking a smartphone during a face-to-face meeting with clients or colleagues when someone else is presenting (83 percent find it unacceptable)
- Checking a smartphone while driving (82 percent find it unacceptable)

Mobile workers are mixed on whether the following behaviors are acceptable or unacceptable:

- Checking a smartphone during a meal or out with friends (56 percent find it acceptable)
- Letting a child under the age of seven use a smartphone as entertainment when out to dinner (54.2 percent find it unacceptable)
- Taking a call from a smartphone/cellphone in a public toilet (64 percent find it unacceptable)
Although the majority of mobile workers find these behaviors unacceptable, 40 percent admit to having taken a call on a smartphone or a cellphone during a meeting, 48 percent have checked a smartphone during a face-to-face meeting with clients or colleagues when someone else is presenting, and 49 percent have checked a smartphone while driving.

And while mobile workers were mixed on whether the following behaviors are acceptable or unacceptable, 73 percent admit to checking a smartphone during a meal or out with friends, 31 percent have let a child under the age of seven use a smartphone as entertainment when out to dinner, and 29 percent have taken a call from a smartphone/cellphone in a public toilet.

Overall, 89 percent of mobile workers have engaged in at least one of these behaviors. By generation, 93 percent of those under the age of 45, and 80 percent of those over the age of 55 have engaged in at least one of these behaviors.

Recommendations for IT:

- Do not fight the tide of mobile workers using rogue devices, such as smartphones and tablets. Mobile workers are highly productive and work more hours annually than their non-mobile peers. It is clear that your mobile professionals value tablets as a work device, and they already have a smartphone – so embrace these devices regardless if they are IT managed or not, but definitely put policies in place on acceptable use and train employees on those policies so that they understand how to secure the data on these devices.

- Ensure your employees at least have access to work email on their unprovisioned smartphone or tablet. Most employees will check email before they start their workday, and this simple, but powerful tool ensures that they can be more responsive to business demands.
The Right Tools for the Job
With the increased penetration of the smartphone and the rise in popularity of the tablet, social boundaries are not only being redefined, but the tools and applications that mobile employees use are changing and adapting to the new work modus operandi.

In this section, we explore what applications employees are using on their smartphones, tablets, and laptops. Which are their favorite tools for each application? Surprisingly, note taking applications are popular with mobile workers even on smartphones, and if you have a tablet, your tablet is your preferred device for note taking and video streaming.

You are what you use
Wi-Fi/Internet connectivity applications continued to top the list of what mobile employees are using on their tablets and smartphones. 77 percent said they use Wi-Fi/Internet connectivity applications, and we see this continuing as devices remain inexpensive, network costs continue to climb, and Wi-Fi remains cheap and plentiful.

The practice of using a smartphone as a personal hotspot is still fairly new to mobile employees. Only 31 percent of mobile employees use their smartphone as a personal hotspot. 12 percent don’t use it because their company turned the service off, and 15 percent don’t use it because their smartphone doesn’t support this capability. This will be an interesting trend to watch as more phones come equipped with this capability, cellular networks continue to be bogged down, and data plans become more expensive.

Looking at traditional business applications, the top five native business applications for the smartphone or tablet among mobile employees (other than email and Wi-Fi) are:

1. Note taking applications (47 percent)
2. Contract/contact management (39 percent)
3. Office suites (33 percent)
4. Social media for work (30 percent)
5. Web conferencing (25 percent)

The vast majority of mobile employees are comfortable using native business applications on their smartphones and tablets. Only 20 percent of mobile employees do not have any native business applications other than email on their smartphone or tablet. From an IT planning perspective, it is important to note what applications employees are using and how they get the applications on their smartphone and tablets. More than half of mobile workers purchased the business applications from an application store, 34 percent downloaded them from a PC, and 25 percent had them preinstalled on their smartphone.

![Figure 21 – How did you get your mobile business applications onto your smartphone?](image)
In terms of web applications (applications accessed through the browser, but not installed), the top business applications accessed by mobile employees from their smartphone or tablet are:

1. Social media for work (21 percent)
2. Information management (20 percent)
3. Web conferencing (19 percent)
4. Note taking (17 percent)
5. Office suites (17 percent)

A third of mobile workers do not access business applications from their browser on their smartphone or tablet. But as more powerful applications move to the cloud, we expect these numbers to increase.

Separately, there has been a lot of discussion about wallet technology. Slightly more than half of all mobile workers would use their smartphone as a wallet. However, those that will not voiced security as their primary concern.

**Post-PC Era - The right tools for the job**

As employees carry what we call a mobile stack – a combination of laptop, smartphone, and increasingly tablets – we wanted to find out which device they prefer to use for popular applications such as email, video streaming, web conferencing, and note taking. The surprise was how much having a tablet changed their preferences. For the general mobile worker population, the laptop was the most popular choice for email (44 percent), video streaming (58 percent), document editing (87 percent), web conferencing (74 percent), and note taking in meetings (47 percent).
Figure 22 – What is your favorite mobile device (tablet, smartphone, netbook, or laptop) for the following tasks? (General mobile worker population and tablet owner)
Recommendations for IT

- We have entered a collaborative era, and employees are increasingly comfortable using mobile business applications outside of email. There is a huge opportunity for companies to look outside the traditional front office suite for applications that employees will find extremely useful.

- While distributing business applications for smartphones and tablets to employees remains a challenge, most employees are comfortable getting their business applications from a variety of sources, including application stores. Also, make sure to support proper password policies and data security even for personal devices. This is a good consideration to help protect the data.
On the Road with Mobile Workers

The mobile workers we surveyed have several things in common; they have smartphones, increasingly have tablets, telecommute, and travel on business. In fact, 94 percent expect to travel on business this year. 49 percent expect to spend at least 30 days on the road for business.

One interesting point is that extensive business travel does not necessarily equate to hyperconnectivity among mobile workers. Those that spend at least 30 days annually on the road on business, mirror the general mobile workforce population when it comes to social boundaries.

In this section, we look at business travel. Are employees traveling more or less than in 2010? Do they use hotel Wi-Fi, and how much of their mobile stack (laptop, smartphone, and increasingly tablet) are they connecting to hotel Wi-Fi?

Business travel

49 percent of mobile workers expect to spend a month or more on business travel, compared to 56 percent that made that prediction in 2010. This represents a 7 percent decline. While 27 percent of mobile workers expect to travel more than last year, more than 18 percent expect to travel less.

<table>
<thead>
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<th>Time Expectation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;30 days</td>
<td>49.0%</td>
</tr>
<tr>
<td>10 to 20 days</td>
<td>21.6%</td>
</tr>
<tr>
<td>5 to 10 days</td>
<td>13.3%</td>
</tr>
<tr>
<td>&lt; 5 days</td>
<td>10.2%</td>
</tr>
<tr>
<td>I don’t expect to travel for business</td>
<td>5.9%</td>
</tr>
</tbody>
</table>

Figure 23 – How much time do you expect to spend traveling for business this year?
From the survey, we are seeing collaborative applications, such as web conferencing, play a role in why 18 percent of mobile employees expect to travel less this year, although it is not the primary reason. According to survey respondents, cutbacks in travel are due to:

1. Their role within their company requires less travel (47 percent)
2. Their company has cut back on travel (40 percent)
3. Their company is using more web conferencing in lieu of travel (34 percent), or
4. They have personally decided to travel less this year (12 percent)

For 35 percent of mobile workers, more than half of their travel will be international. Not surprisingly, nearly 53 percent of Europeans believe that more than half of their travel will be international, while 37 percent of those in the Asia Pacific region believe this, and only 19 percent of those in North America believe this.
**Hotel Wi-Fi**

On the road, nearly 68 percent of mobile workers will pay for a faster connection at a hotel when a free network is also available. 28 percent will only pay if the free connection is too slow, and almost 33 percent will pay depending on what they are using the connection for.

![Graph](image)

**Figure 26** – At a hotel, would you pay more for a faster connection when a free network is also available?

Mobile workers also connect their complete mobile stack to Wi-Fi at the hotel. To start with, almost 96 percent of mobile workers use hotel Wi-Fi. 71 percent connect two or more devices, and nearly 16 percent connect three or more devices.

![Graph](image)

**Figure 27** – How many devices (smartphone, laptop, tablet, etc.) do you typically connect to Wi-Fi [when available] when staying at a hotel for business travel?
**Recommendation for IT:**

- Employees that travel for business need tools to ensure that they can connect. Most connect to Wi-Fi in their hotels and connect multiple devices. Due to limited technical resources at hotels, connection tools should be simple and easy to use.

- Speed often matters. Most mobile employees will pay for a faster Wi-Fi connection even when free Wi-Fi is available.

- Travel is still a fact of life and is increasing in some areas. Make sure that the cost of mobility does not rise out of control. IT should implement reports and policies to help ensure that 3G roaming is not abused and that free Wi-Fi is used when practical. The user experience should be simple so that support requirements are not bogging down IT.
Conclusion
Social boundaries are being redefined and workforce rules are being rewritten — whether we like it or not. While social boundaries define how polite society behaves, this new paradigm also blurs the lines between personal and public, work and life.

Mobile workers have several things in common. They have the appropriate tools of their trade: laptops, smartphones and increasingly tablets. In fact, this population is approaching the 100 percent penetration mark for smartphones, while at the same time they are surpassing the majority mark for tablets. The mobile stack — the trinity of devices — is indeed the new unit of computing for mobile workers as increasingly they are carrying a laptop, a smartphone, and a tablet.

But what does smartphone saturation mean to mobile workers? Smartphones and tablets, for that matter, are deeply personal devices and occupy more of the mobile workforce’s free time than ever before. We have brought them into our bedrooms, and they keep us up at night with gentle pings letting us know that the rest of the world has not gone to sleep. We also consult them before we start our workday, to reassure ourselves that we didn’t miss anything, to collaborate with a co-worker in a different time zone, or to fight a work issue that has erupted while we slept.

In this quarter’s report, we not only saw a redefinition of social boundaries, but a change in the tools and applications that mobile employees use as they adapt to the new work modus operandi. New productivity applications, like note taking, are gaining legs among the highly mobile workers, and as our tools evolve, our preferences for the right tool for the job are also changing.

Most mobile workers are constantly connected, highly responsive, and ready to be engaged outside of traditional office hours. They telecommute and travel on business. Their mobility helps them stay competitive in a fast-paced and challenging business environment. They manage to work 240 hours longer annually than their less mobile peers. Work does not keep them up at night, and their mobility does not cause friction in their personal relationships – more than half store their smartphone out of arm’s reach. Still, how the mobilocracy defines their personal boundaries determines the effects of their mobility on their work and their personal life.
Summary of Recommendations for IT

- Do not fight the tide of mobile workers using rogue devices, such as smartphones and tablets. Mobile workers are highly productive and work more hours annually than their non-mobile peers. It is clear that your mobile professionals value tablets as a work device, and they already have a smartphone – so embrace these devices regardless if they are IT managed or not. But definitely put policies in place on acceptable use and train employees on those policies so that they understand how to secure the data on these devices.

- We have entered a collaborative era, and employees are increasingly comfortable using mobile business applications outside of email. There is a huge opportunity for companies to look outside the traditional front office suite for applications that employees will find extremely useful.

- While distributing business applications for smartphones and tablets to employees remains a challenge, most employees are comfortable getting their business applications from a variety of sources, including application stores. Also, make sure to support proper password policies and data security even for personal devices. This is a good consideration to help protect the data.

- Speed often matters. Most mobile employees will pay for a faster Wi-Fi connection even when free Wi-Fi is available.

- Travel is still a fact of life and is increasing in some areas. Make sure that the cost of mobility does not rise out of control. IT should implement reports and policies to help ensure that 3G roaming is not abused and free Wi-Fi is used when practical. The user experience should be simple so that support requirements are not bogging down IT.

About iPass

Founded in 1996, iPass (NASDAQ: IPAS) manages mobile connectivity for large enterprises and global carriers through mobility and cloud services. With thousands of enterprise customers, iPass is a leading provider of enterprise mobility services which simply, smartly and openly facilitate access from any device on any network, while providing IT with the visibility and control necessary to support the demands of the enterprise workforce. iPass also provides in-country and international WiFi off-load and roaming services robust enough to support both the business and mass market requirements of telecom carriers.

Additional information is available at www.iPass.com or on Smarter Connections, the iPass blog.