iPass Mobile Professional Report 2016

iPass

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Introduction

The iPass Mobile Professional Report 2016 analyzes some of the biggest connectivity trends affecting mobile professionals in the U.S. and Europe. In this report, you'll learn how mobile professionals are managing to remain productive and connected on-the-go, and to what extent internet connectivity has impacted their professional and personal lives. The report highlights the fact that today's mobile professional is heavily reliant on Wi-Fi and is increasingly choosing Wi-Fi over other connectivity methods. Furthermore, many professionals are making their travel choices based on the Wi-Fi experience.

- **Wi-Fi more important than sex, chocolate or alcohol**
  Internet connectivity has become an essential part of our daily lives, to such an extent that Wi-Fi has surpassed many other human luxuries and necessities in importance. Forty percent of respondents said that Wi-Fi is more important to them than sex, chocolate or alcohol.

- **Mobile professionals would choose a Wi-Fi hotspot over mobile data services**
  Mobile professionals want to go Wi-Fi first. Despite mobile data services being instantly available to users on the go, those services still have a way to go in terms of catching up to Wi-Fi in terms of speed, cost, convenience and performance. Our report shows that 63 percent of respondents would choose a Wi-Fi hotspot over mobile data services.

40%
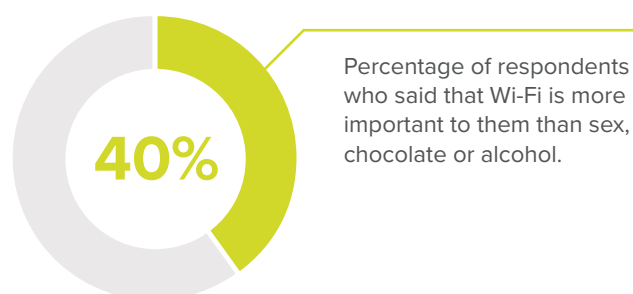
Percentage of respondents who said that Wi-Fi is more important to them than sex, chocolate or alcohol.

"Internet connectivity has become an essential part of our daily lives, to such an extent that Wi-Fi has surpassed many other human luxuries and necessities in importance."

- **Mobile professionals are choosing their hotels, flights and destinations based on Wi-Fi connectivity**
Wherever people are and whatever they are doing, they expect to be connected. Seventy-two percent of people have chosen a hotel based on the Wi-Fi experience, with 21 percent saying they do so all the time. A further 35 percent of respondents stated the Wi-Fi experience had influenced their choice of airline.

- **Employees know the security risks of public Wi-Fi, but many still use it anyway**
Sixty-six percent of respondents say that they are worried about the security of Wi-Fi hotspots. However, 42 percent have accessed corporate data via public networks, and many (38 percent) have never used a VPN (Virtual Private Network) to help secure their data.
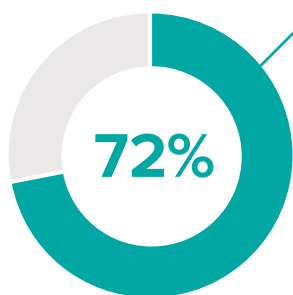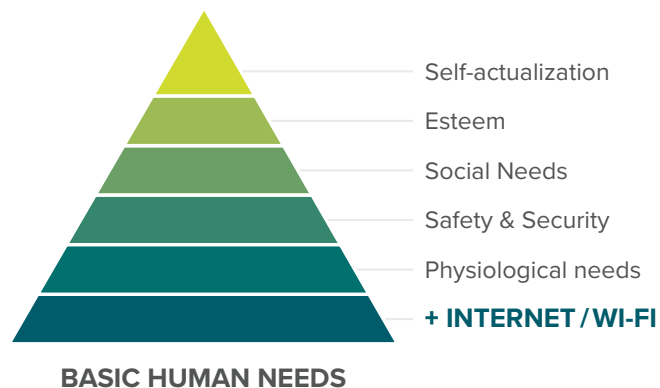
72% Percentage of people who have chosen a hotel based on the Wi-Fi experience. Of those, 21% say they do so all the time.

Wi-Fi more important than sex, chocolate or alcohol

Wi-Fi is not only the most popular method of internet connectivity, it has surpassed many other human luxuries and necessities.
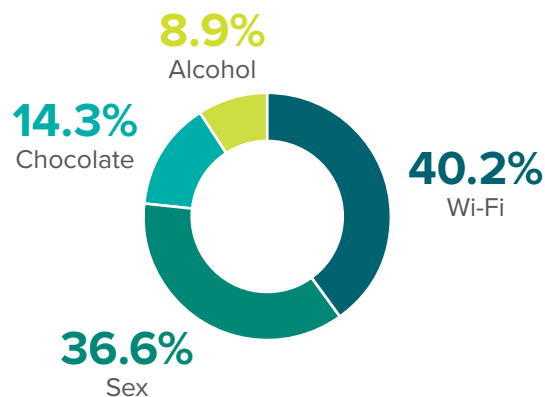
The idea that Wi-Fi would be considered more important than sex, alcohol and chocolate would have been unthinkable just a few years ago. Yet, 40 percent of respondents chose Wi-Fi as their number one, daily essential, ahead of sex (37 percent), chocolate (14 percent) and alcohol (9 percent).

For some time now, the internet has appeared on the bottom line of Maslow's hierarchy of needs, almost as a longstanding joke in geek culture. Recently, the idea has gone mainstream.

Self-actualization
Esteem
Social Needs
Safety & Security
Physiological needs
+ INTERNET / WI-FI

BASIC HUMAN NEEDS

SURVEY QUESTION:

Please rank in order which of the following is most important to you on a daily basis (with 1 being least important and 4 being most important).

	Score
Wi-Fi	3.0
Sex	2.8
Chocolate	2.3
Alcohol	1.9

Score: 0 1 2 3 4 5

8.9% Alcohol

14.3% Chocolate

40.2% Wi-Fi

36.6% Sex
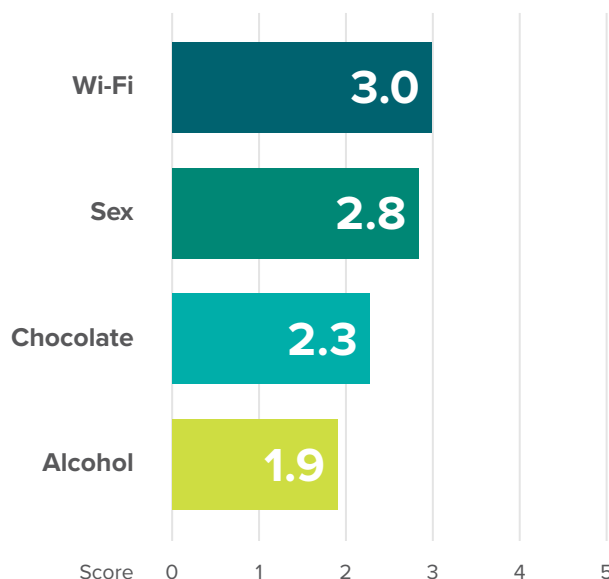
Wi-Fi is making a tangible difference in people's lives

Wi-Fi is more than just a luxury; it is making a tangible difference in people's day-to-day lives. Three-quarters of respondents said that Wi-Fi has improved their quality of life. For many of us, Wi-Fi is indispensable, from the minute we wake up to the minute we go to sleep.

The most popular reasons why respondents said Wi-Fi had improved their quality of life include allowing people to work from anywhere (60 percent) and download/stream content from the comfort of their sofa or bed (60 percent). Wi-Fi has also improved people's travel / commute experience (52 percent), brought people closer to their friends and family (48 percent), and has saved them money (44 percent), since Wi-Fi is more cost effective than mobile data.

SURVEY QUESTION:

Has Wi-Fi improved your quality of life?

25.1%
No

74.9%
Yes
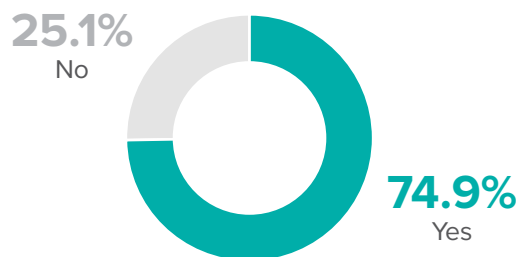
SURVEY QUESTION:

If you answered yes, how has Wi-Fi improved your life? (please select all that apply)

I can work from anywhere (including my home) meaning I have a better work/life balance	**60.3%**
I can download/stream content from the comfort of my own sofa or bed	**59.6%**
Made my experience travelling / commuting more bearable	**52.0%**
Brought me to closer to friends and family	**48.2%**
It has saved me money, as it is more cost effective than 3G/4G services	**44.2%**
Made my home/workplace tidier (fewer cables!)	**36.3%**
It has made me better at my job as I am now more productive	**32.7%**

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

Choices, choices, choices

There are a variety of connectivity options available to businesses and mobile professionals, determining the most suitable comes down to several factors, including performance, cost, speed, security and convenience. However, it is abundantly clear that mobile professionals want to go Wi-Fi first where possible. Nearly two-thirds of respondents (63 percent) said they would choose Wi-Fi over mobile as their preferred connectivity method.

For the respondents who choose Wi-Fi hotspots over mobile data services, cost is the determining factor (42 percent). Convenience comes in second (27 percent), while one-fifth of mobile professionals said they would choose Wi-Fi over mobile data, because of superior speed.

Conversely, for respondents who chose mobile data services over Wi-Fi, security was cited as the top reason (48 percent), which highlights the growing need for businesses to provide their mobile workforces with the tools needed to securely connect, e.g. a VPN (Virtual Private Networking VPN).
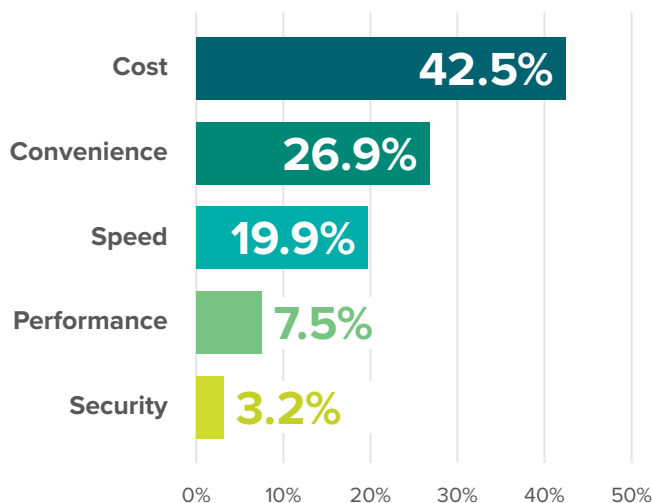
SURVEY QUESTION:

If given the option to connect to a Wi-Fi hotspot or use mobile data services, which would you use first?

36.9%
Mobile data services

63.1%
Wi-Fi hotspot

SURVEY QUESTION:

If you answered Wi-Fi hotspot, what was your reason for doing do? (select one answer)

Cost	**42.5%**
Convenience	**26.9%**
Speed	**19.9%**
Performance	**7.5%**
Security	**3.2%**

0% 10% 20% 30% 40% 50%

SURVEY QUESTION:

If you answered mobile data service, what was your reason for doing do? (select one answer)

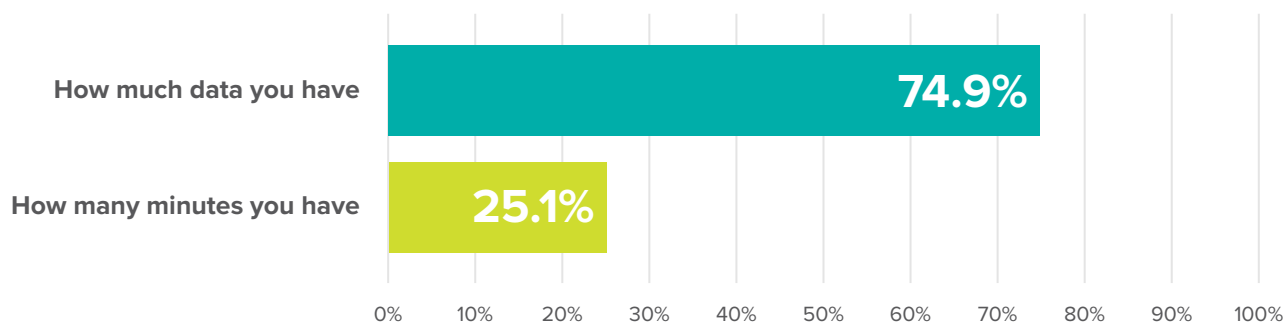|	
Security	**47.6%**
Convenience	**24.2%**
Cost	**10.9%**
Speed	**10.4%**
Performance	**6.9%**

0% 10% 20% 30% 40% 50%
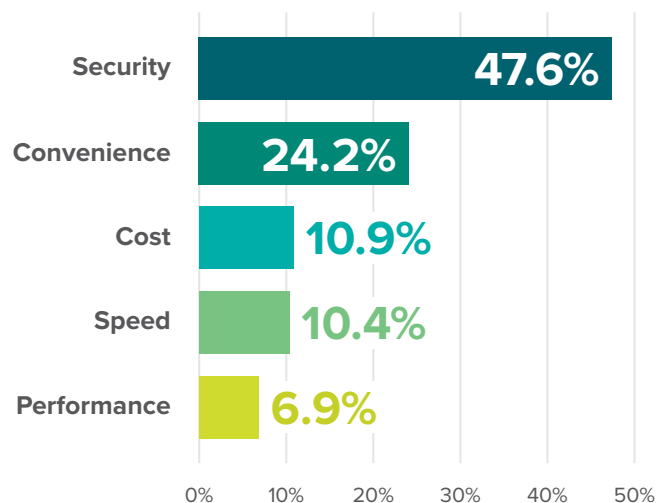
Data is key

Internet-based services and mobile applications like Whatsapp and Facetime have superseded many traditional phone functions. Moreover, many of the things people do regularly on their smartphones are wholly dependent on internet connectivity, including maps, social media and email. Given our dependence on internet connectivity in the office, at home and while traveling, it's no surprise that mobile data is now the principal consideration when choosing a cellular contract. Three-quarters of respondents said that data is more important than minutes when choosing a cellular contract.

"...mobile data is now the principal consideration when choosing a cellular contract."

SURVEY QUESTION:

When choosing a mobile/cellular contract, which is most important to you?

How much data you have **74.9%**

How many minutes you have **25.1%**

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
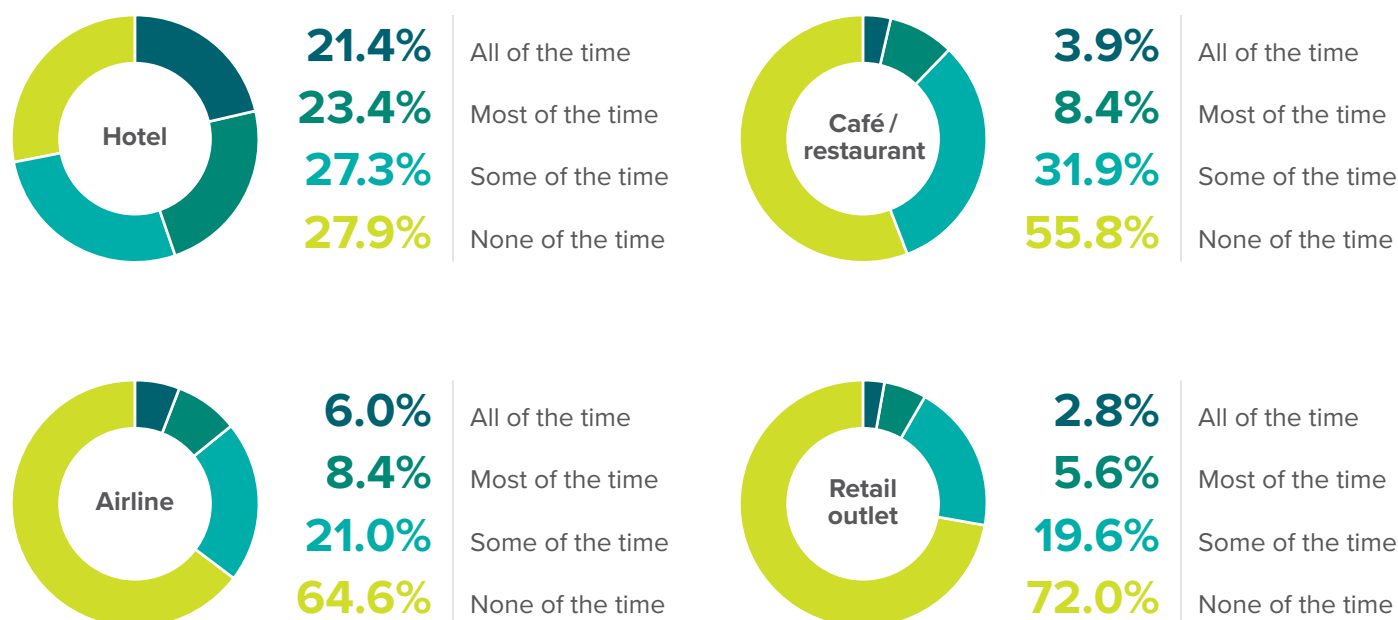
Staying connected on the go

For mobile professionals who don't want to be stung by data bills or exorbitant roaming charges, Wi-Fi has become a travel essential, influencing hotel, airport and travel choices.

Seventy-two percent of respondents say they have chosen a hotel based on the Wi-Fi experience, with 21 percent stating they do this all the time. Nearly half of all respondents (45 percent) have done so for a café or restaurant.

Perhaps more surprising is the fact that 35 percent have chosen their airline based on Wi-Fi. In the past, Wi-Fi has always been a bonus for mobile professionals. Today though, wherever people are, there is an expectation of connectivity—even at 30,000 ft.

SURVEY QUESTION:

How much does the Wi-Fi experience influence your choice of (Café/restaurant, Hotel, Airline, Retail outlet):

Hotel

21.4%	All of the time
23.4%	Most of the time
27.3%	Some of the time
27.9%	None of the time

Café / restaurant

3.9%	All of the time
8.4%	Most of the time
31.9%	Some of the time
55.8%	None of the time

Airline

6.0%	All of the time
8.4%	Most of the time
21.0%	Some of the time
64.6%	None of the time

Retail outlet

2.8%	All of the time
5.6%	Most of the time
19.6%	Some of the time
72.0%	None of the time

Users demand free airport Wi-Fi

Mobile professionals who travel regularly will spend a significant portion of each business trip at the airport. However, they are no longer content to just sit and wait for their flights. Instead they want to remain productive or simply unwind during this valuable time. As a result, our report shows that a significant majority of respondents (72 percent) will use free airport Wi-Fi when available.

Mobile professionals aren't just making use of airport Wi-Fi, they are using it as much as they possibly can. Of those respondents who use airport Wi-Fi, more than half (52 percent) say they use airport Wi-Fi for as long as it remains free. An additional 19 percent said they would use it until their plane takes off, even if that means paying for it.
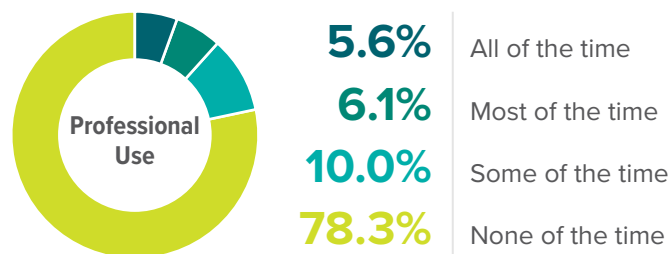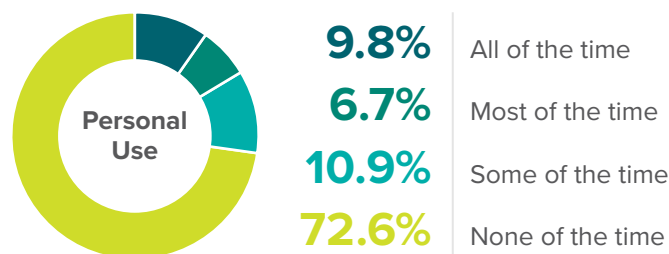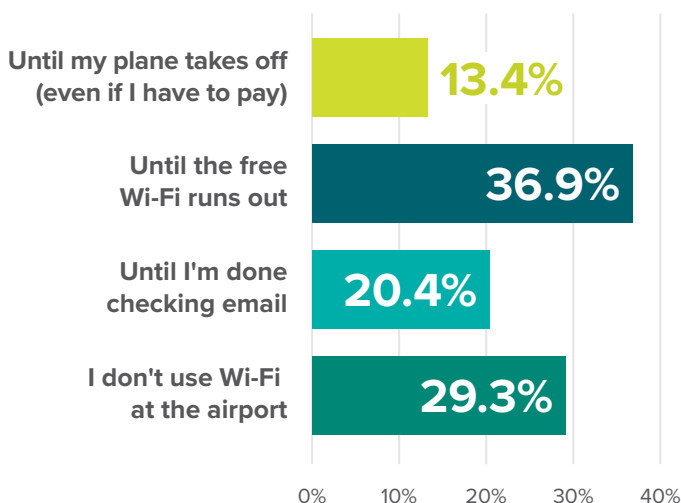
While on-demand Wi-Fi or free trials may be seen as an effective means of introducing additional revenue into airports, providing a good user experience and ensuring customer loyalty is paramount. It's clear that many users simply won't pay for airport Wi-Fi. Seventy-three percent of respondents have never paid for airport Wi-Fi for professional use. This number rises to 78 percent for personal use.

SURVEY QUESTION:

Do you use free Wi-Fi at airports if it's available?

28.1%
No

71.9%
Yes

SURVEY QUESTION:

How long do you typically use Wi-Fi at the airport?

Until my plane takes off (even if I have to pay) — **13.4%**

Until the free Wi-Fi runs out — **36.9%**

Until I'm done checking email — **20.4%**

I don't use Wi-Fi at the airport — **29.3%**

0%   10%   20%   30%   40%

SURVEY QUESTION:

When you use paid Wi-Fi at an airport, how often is it for (Personal Use and Professional Use):

Personal Use

9.8% All of the time
6.7% Most of the time
10.9% Some of the time
72.6% None of the time

Professional Use

5.6% All of the time
6.1% Most of the time
10.0% Some of the time
78.3% None of the time

The IT security disconnect

Wi-Fi is known for being fast, convenient and reliable, but free Wi-Fi hotspots are increasingly seen as an IT security risk. In an age where data breaches make headline news on a nearly daily basis, businesses would be forgiven for wanting to shut down access to their systems from the outside world entirely. But for others, it seems the demands of modern business take priority over security. For these businesses, the benefit of having their employees able to access email and corporate data while on-the-go far outweighs possible IT security risks. As a result, just over half (51 percent) of mobile professionals said that their companies allow them to use personal devices to access corporate data via public Wi-Fi.

SURVEY QUESTION:

Does your company allow you to use your personal devices (smartphone, tablet, laptop, etc.) to access corporate data/systems via public or remote Wi-Fi?

47.3%
No

52.7%
Yes

These findings are supported by iPass' Mobile Security Report 2016, which found that 94 percent of organizations see public Wi-Fi as a threat. At the same time, 88 percent of organizations admit to finding it difficult to consistently enforce a safe mobile usage policy. All of which suggests that businesses are struggling to create security policies that provide mobile professionals with the flexibility they demand.

SURVEY QUESTION:

Are you worried about data security when using free Wi-Fi hotspots?

34.8%
No

65.7%
Yes
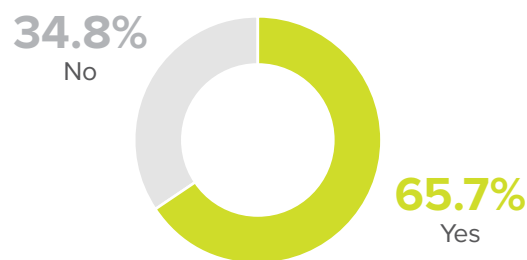
Not only are businesses of two minds on the IT security versus productivity issue, many employees still choose high risk connectivity options despite knowing the potential risks. Sixty-six percent of mobile professionals said they were worried about data security when using free Wi-Fi hotspots, yet 42 percent will still access company data using those hotspots.

SURVEY QUESTION:

How often do you access company data using public Wi-Fi?

Access company data

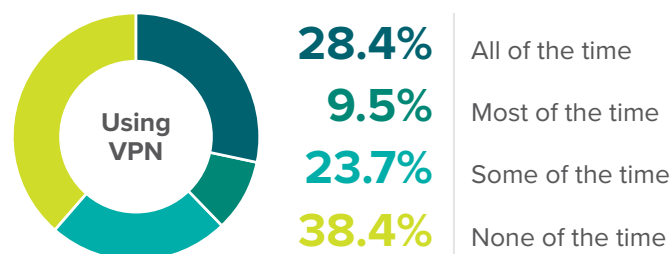|	
5.5%	All of the time
3.9%	Most of the time
33.0%	Some of the time
57.6%	None of the time
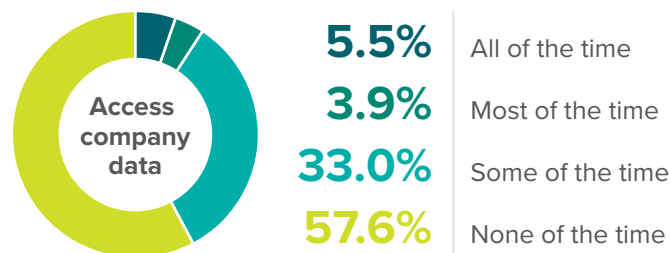
How mobile professionals are using public Wi-Fi hotspots is also an issue. Only 28 percent of respondents say they use a VPN all the time; and more than a third (38 percent) never do. VPNs are an incredibly effective way of ensuring valuable data, personal and corporate, remains secure while users are connected to public Wi-Fi hotspots. VPNs should be an essential tool for mobile workers. These findings suggest that businesses and their employees are not always on the same page when it comes to protecting corporate data and using Wi-Fi hotpots for business activities.

Unfortunately, the priorities of companies and their employees are also worlds apart. Employees have vast troves of valuable data on their smartphones, but are considerably less concerned about losing sensitive corporate data, compared to personal information. Less than one in ten employees (9 percent) list corporate data loss if their device were lost or stolen as one of their main fears. By contrast, six times as many respondents were likely to be worried about losing contact info (57 percent) and almost half (49 percent) feared losing their photos.

In fact, almost as many people feared getting lost without access to Google Maps (or a similar application), as they feared their corporate data/systems being hacked.
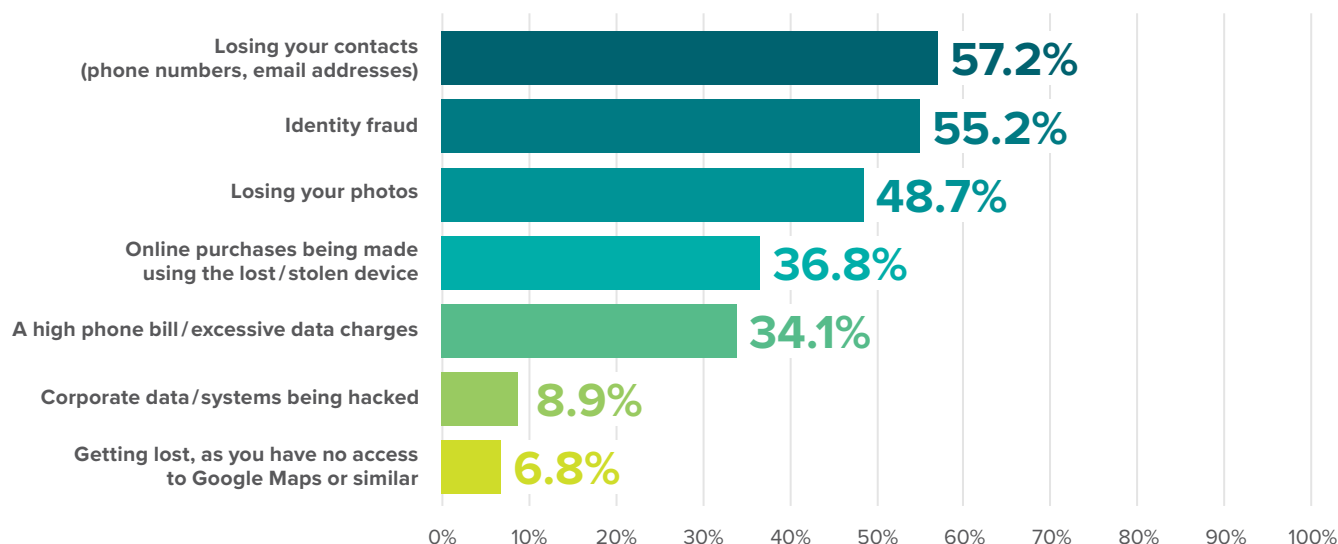
SURVEY QUESTION:

If you access company data using public Wi-Fi, how often do you use a VPN?

Using VPN

28.4% All of the time

9.5% Most of the time

23.7% Some of the time

38.4% None of the time

SURVEY QUESTION:

If your smartphone was lost/stolen, what would do you fear the most? (please select all that apply)

Losing your contacts (phone numbers, email addresses)	**57.2%**
Identity fraud	**55.2%**
Losing your photos	**48.7%**
Online purchases being made using the lost/stolen device	**36.8%**
A high phone bill/excessive data charges	**34.1%**
Corporate data/systems being hacked	**8.9%**
Getting lost, as you have no access to Google Maps or similar	**6.8%**

Conclusion

Wi-Fi is changing the world for the better, faster than anyone ever expected. Whether mobile professionals are at home, traveling between client meetings, at their hotel on a business trip or even inflight, they expect to remain connected and productive at all times, working and unwinding as they see fit, not as dictated by their internet connection. Mobile workers don't want to waste their mobile data on draining business/personal applications either, or use slower connectivity options which may not provide the reliability and performance they require. They want to go Wi-Fi first.

Knowing how vital Wi-Fi is in today's society and how frequently it is used by on-the-go employees, businesses cannot afford to ignore it. For employers, the financial cost of unproductive and unhappy employees can be severe. In today's Wi-Fi-first world, mobile professionals need to be given the tools to get online and remain productive wherever they are, while simultaneously ensuring that the use of public Wi-Fi doesn't expose their corporate data to ever-growing IT security risks. On the flip side of the coin, for organizations in travel and hospitality, not catering to customers' demands for connectivity can have a significant negative impact on revenues.

For both, the answer is simple, giving customers or employees what they want most—more than sex, chocolate or alcohol—secure and reliable Wi-Fi connectivity.

Survey Methodology

This report is based on information obtained from more than 1,700 respondents to an iPass survey of mobile professionals. Survey respondents were asked about their connectivity habits, preferences and expectations, and were asked to provide opinions about their level of dependence on mobile connectivity.

The survey was conducted between August 12, 2016 and August 31, 2016, representing mobile professionals across multiple age groups and geographies. 60 percent of respondents came from North America, and 40 percent were from European countries. Responses were examined by region, age range and gender.

About iPass

iPass (NASDAQ: IPAS) is the leading provider of global mobile connectivity, offering simple, secure, always-on Wi-Fi access on any mobile device. Built on a software-as-a-service (SaaS) platform, the iPass cloud-based service keeps its customers connected by providing unlimited Wi-Fi connectivity on unlimited devices. iPass is the world's largest Wi-Fi network, with more than 57 million hotspots in more than 120 countries, at airports, hotels, train stations, convention centers, outdoor venues, inflight, and more. Using patented technology, iPass SmartConnect™ takes the guesswork out of Wi-Fi, automatically connecting customers to the best hotspot for their needs. Customers simply download the iPass app to experience unlimited, everywhere, and invisible Wi-Fi.

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iPass Corporate Headquarters
3800 Bridge Parkway
Redwood Shores, CA 94065

phone: +1 650-232-4100
fax: +1 650-232-4111

www.ipass.com