

iPass Mobile Professional Report 2017

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Executive summary

The iPass Mobile Professional Report 2017 analyzes some of the biggest connectivity trends impacting mobile workers in the US and Europe. In this report, you'll learn how Wi-Fi affects their behavior, choices, and ability to do their job effectively. You'll discover that mobile professionals are addicted to their smartphones and to Wi-Fi access—wanting to be connected always, instantly, and in every setting imaginable. They are anxious when not connected to Wi-Fi and need it to work effectively. Key findings include:

- **Mobile professionals want to stay connected EVERYWHERE**

Nearly two thirds of mobile professionals said they feel anxious when they're not connected to Wi-Fi, and there seems to be no setting where they won't use their smartphone. More than half (53 percent) use their smartphone during meetings, 72 percent admitted to checking their smartphone on the toilet, 11 percent from a funeral and seven percent during sex. Indeed, Wi-Fi has become so important to mobile professionals that it is now the number one determining factor when choosing a hotel—a room with a view isn't the be-all and end-all after all.

- **Wi-Fi is more addictive than sex, drugs or alcohol**

More than just wanting to get connected to do their job, modern mobile professionals are addicted to Wi-Fi/connectivity. They believe it is even more difficult to give up than sex, drugs or alcohol—not to mention junk food and smoking. Some respondents even choose it above other daily necessities such as human contact or a bath/shower, such is their dependence on it.

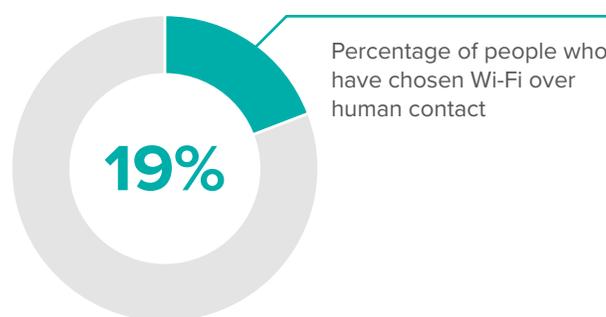
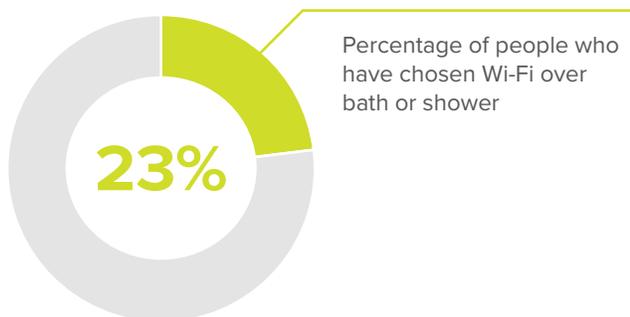
- **Wi-Fi for work**

The benefit of Wi-Fi access for mobile professionals is plain to see. More than half of mobile workers say that a lack of Wi-Fi when working remotely would negatively impact their ability to do their job in some capacity. This is evidenced by the fact that mobile workers behave vastly differently when they're connected to Wi-Fi, compared to their use of mobile/cellular data. Data intensive tasks such as video conference calls are far more popular on Wi-Fi, likely due to its superior performance, reliability, and lack of data limits.

Wi-Fi now a daily necessity

The internet has become a necessity the world over. It is critical to the operations of every modern enterprise and to the day-to-day life of virtually every employee, none more so than the mobile professional or remote worker. Without it, even the most basic of tasks, such as internal communications and access to files/services, become nigh-impossible outside of the office. These employees will always try to connect to Wi-Fi wherever possible, to the extent that 22 percent of people said that they need it more on a daily basis than a bath or shower; 19 percent even said that they need Wi-Fi more than human contact.

Nearly two thirds of people say they feel anxious when they're not connected to Wi-Fi, primarily because it prevents them from doing certain tasks or working remotely. Ultimately, Wi-Fi has become essential to mobile professionals, who clearly have such an insatiable appetite for Wi-Fi that they will try to connect wherever they are and by whatever means possible.

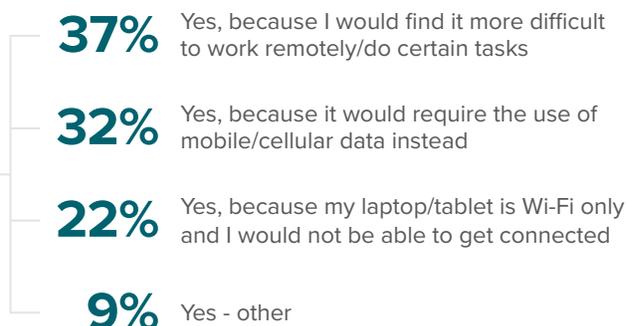


SURVEY QUESTION:

Does the concept of not having Wi-Fi make you anxious?



Breakdown of 'yes' responses:



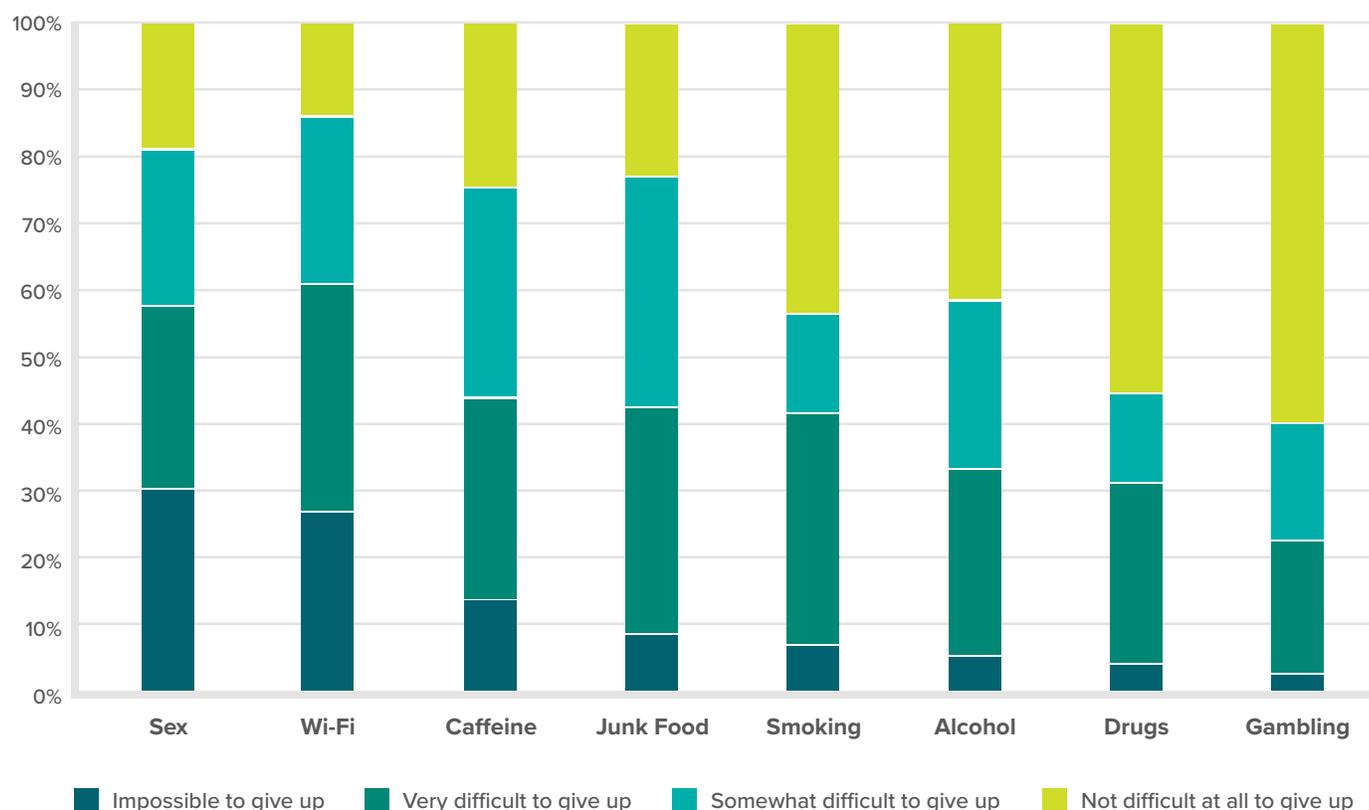
Wi-Fi more addictive than smoking—harder to quit than sex, drugs or alcohol

Given everything that can be done with a smart device and an internet connection, it's no wonder that mobile professionals believe Wi-Fi is highly addictive. In fact, more than a quarter (27 percent) said that Wi-Fi was “impossible to give up”. By contrast, only five percent and seven percent said the same of alcohol and smoking respectively. Wi-Fi even edged out sex in terms of how many people said they'd find it impossible or very difficult to give up (61 percent vs 58 percent).

*More than **27 percent** of people say Wi-Fi is “impossible to give up.”*

SURVEY QUESTION:

Which of the following do you think is the hardest to give up?



Internet anywhere, everywhere

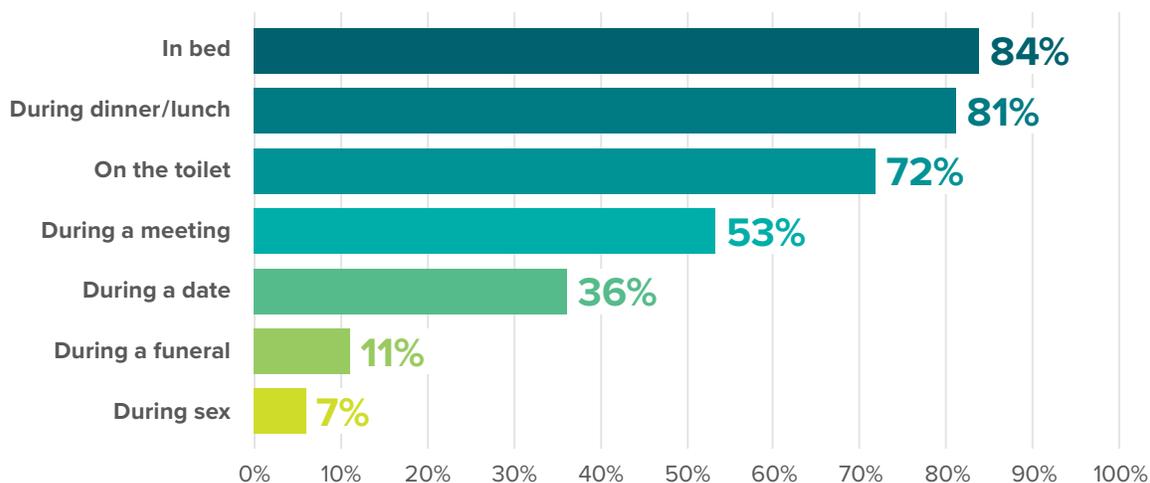
Cafés, hotels and airports are all popular de-facto offices for mobile workers, yet this is only the tip of the iceberg in terms of the places in which people use their smartphones. People simply cannot bear to be apart from their devices, so much so that they use them anywhere and everywhere. And we mean everywhere. It will come as no surprise that 83 percent of people check or use their smartphone in bed. More shocking perhaps is the fact that seven percent have done so during sex. The vast majority, 72 percent, have also admitted to using their phones on the toilet.

While some would consider it an entirely normal thing to do, there may be many others who are grossed out by the thought that the last text message they received came to them from the toilet.

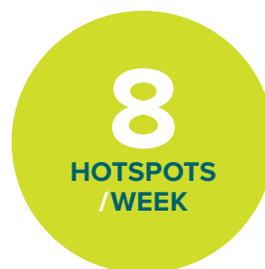
Everyone knows someone who would take their smartphone to the grave, but this is quite literally the case, with 11 percent admitting to using a smartphone at a funeral. For some, there seems to be no location or event that would preclude smartphone use—bedroom, bathroom and beyond.

SURVEY QUESTION:

Have you ever used/checked your smartphone in any of the following scenarios?



The idea that people want to be connected at all times and in all places is emphasized by the number of times mobile professionals connect to public Wi-Fi hotspots (e.g., not including home or work). On average, mobile professionals connect to eight hotspots per week, and a significant proportion (20 percent) access them 20 times a week or more. Enterprises with a large mobile workforce need to be aware of these mobile “power workers,” who connect to Wi-Fi hotspots thousands of times per year. It is their responsibility to ensure these connections are as cost effective, reliable and secure as possible.



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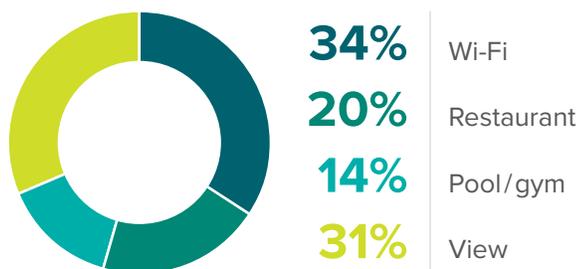
Connected in an instant

Mobile professionals have also indicated that they want to be connected to the internet as quickly as possible, instantly even. This is certainly the case for mobile professionals' most commonly visited venues—such as hotels, airports, train/bus stations, and business meetings. Half of respondents said they want to be instantly connected to Wi-Fi on arrival at a hotel (50 percent), business meeting (53 percent), or airport (48 percent).

In total, 75 percent people said they wanted to be connected within ten minutes of arriving at their hotel. It's a stat supported by the fact that Wi-Fi is now the number one determining factor when choosing a hotel (it's no longer a 'room with a view'), and 42 percent of respondents state that a poor Wi-Fi experience has negatively impacted a hotel stay.

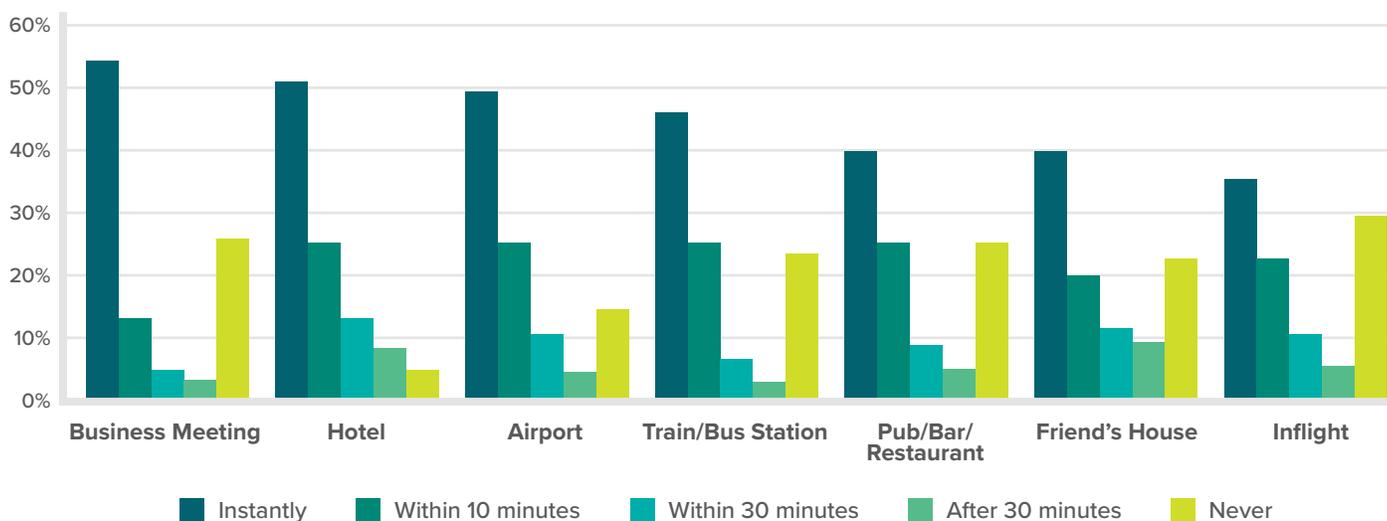
SURVEY QUESTION:

Assuming cost and location are equal, what is the most important factor when choosing a hotel? (Chosen as #1)



SURVEY QUESTION:

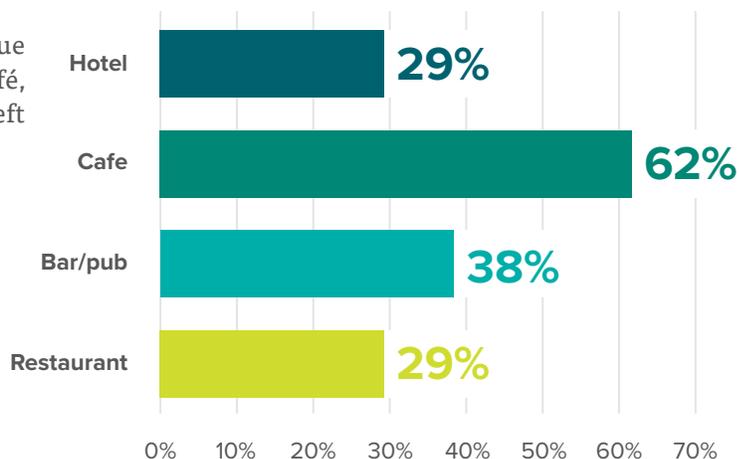
Ideally, when do you want to be connected to Wi-Fi in the following locations?



SURVEY QUESTION:

From respondents who answered yes to leaving a venue due to poor/no Wi-Fi

Of the respondents that said they had left a given venue because it had no/poor Wi-Fi, 62 percent had left a café, 38 percent had left a pub or bar, and 29 percent had left a hotel.



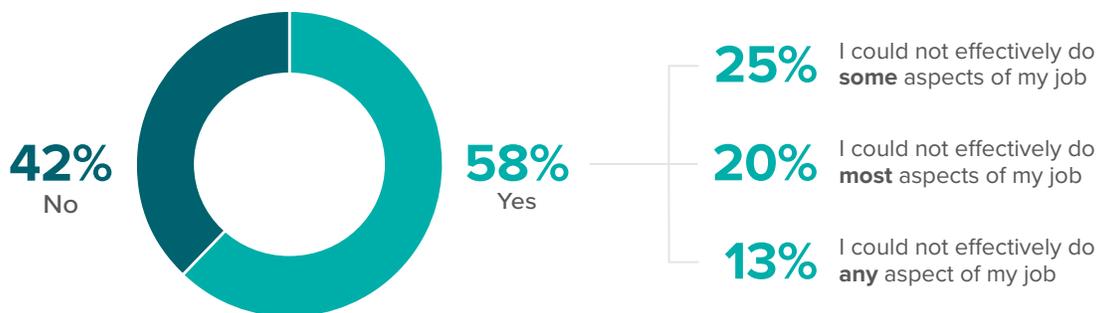
Wi-Fi and the workplace

Earlier we alluded to the idea that mobile professionals can feel anxious without Wi-Fi connectivity, primarily because a lack of Wi-Fi limits their productivity and ability to work remotely. In total, more than half of mobile workers (58 percent) said that a lack of Wi-Fi access would negatively impact their ability to work remotely in some capacity.

The reliance on Wi-Fi among the mobile workforce is easy to understand when you see the extent to which people use Wi-Fi in comparison to mobile/cellular data. While cellular/mobile connectivity has improved significantly in recent years, it's still possible to do far more on Wi-Fi—due to cellular/mobile data restrictions, as well as reliability

SURVEY QUESTION:

Would a lack of remote access to Wi-Fi impact your ability to do your job?

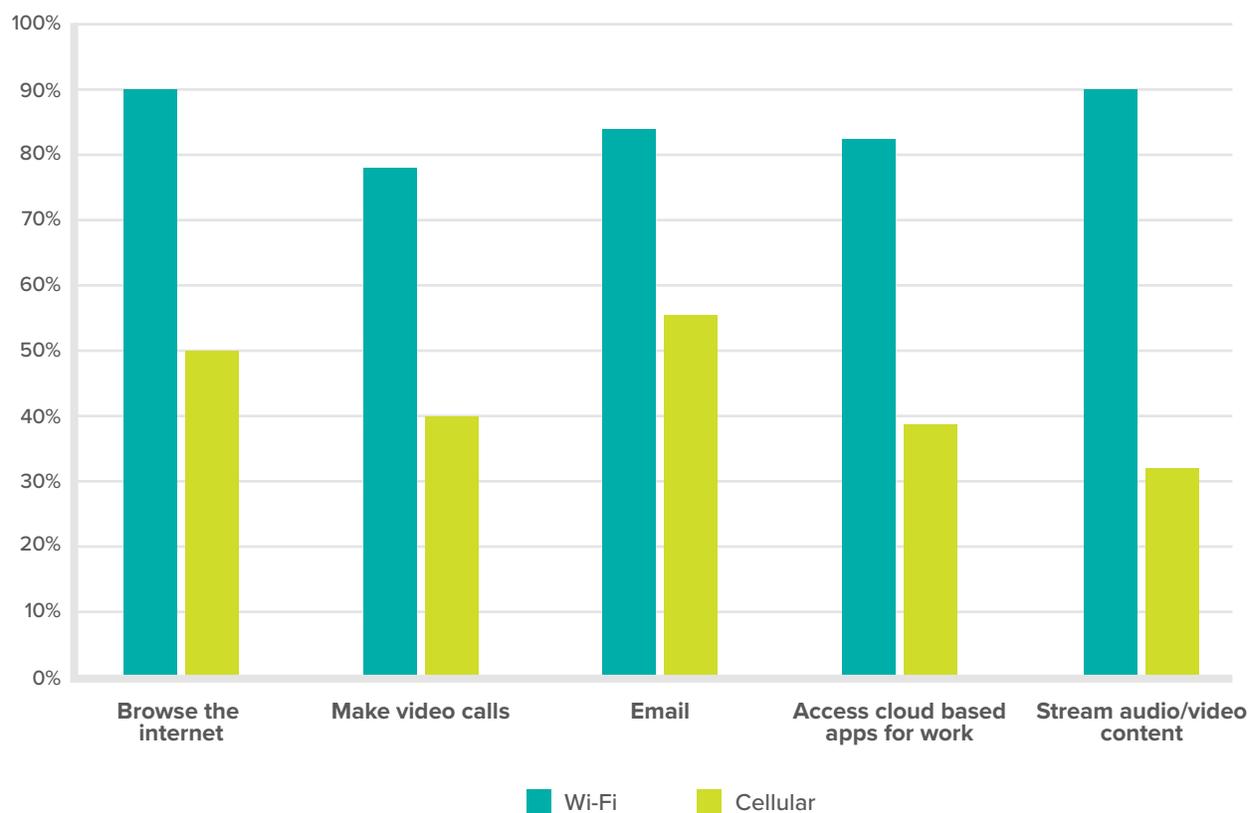


and performance issues. This is particularly true of data intensive tasks such as video calls. This is highlighted by the fact that common internet tasks such as streaming audio/video, making video calls, accessing cloud services, and even shopping, are all twice as popular over a Wi-Fi connection than using mobile/cellular data.

Mobile service providers are not blind to this fact, with many looking to offload mobile data services to Wi-Fi wherever possible. Encouragingly for them, 86 percent of mobile professionals said they would use an unlimited Wi-Fi connectivity service that gives them access to Wi-Fi in chosen venues such as hotels, cafés, trains, airports, and even in-flight, if it was offered by their mobile provider.

SURVEY QUESTION:

Which of the following tasks do you regularly do while connected?



SURVEY QUESTION:

If your mobile operator offered unlimited Wi-Fi connectivity at chosen venues such as hotels, cafés, trains, airports and inflight, how likely would you be to use this service?

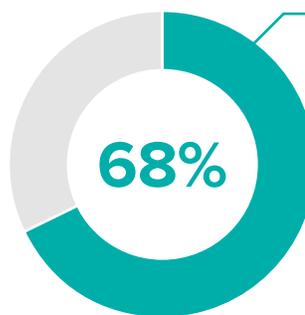


51% Very likely
36% Somewhat likely
8% Not likely
6% Not likely at all

The trouble with missed connections

Wi-Fi access isn't always as straightforward as arriving in a location and getting online. Nearly seven out of ten mobile professionals (68 percent) say that they have decided against using a Wi-Fi hotspot service simply because the registration process was an overly frustrating or time-consuming process.

Given the importance of Wi-Fi connectivity, this could have a significant impact on worker productivity in the short and long term. The numbers bear this out. Nearly 20 percent of mobile professionals estimate they miss more than three hours of working time a week not being able to get connected to the internet—that's 156 hours a year, nearly a full working month. Perhaps it's no surprise, therefore, that nearly half of respondents said that they would be more likely to join a prospective employer if they offered global Wi-Fi access as a perk for all employees.



Percentage of people who said they have decided against using a Wi-Fi hotspot service due to poor experience



Nearly 20 percent of mobile professionals estimate they miss more than three hours of working time a week not being able to get connected to the internet—that's 156 hours a year, nearly a full working month.

Conclusion

When it comes to the preferred connectivity method of mobile professionals, they don't just *want* Wi-Fi, they *crave* it. Wi-Fi is still unmatched in terms of its reliability and performance, despite the undoubted progress of mobile/cellular connectivity in recent years. Wi-Fi empowers mobile and remote working to such an extent that it is mobile professionals' first consideration when choosing a hotel—and they expect to be instantly connected on arrival of course.

This report also shows the impact of not being connected, with mobile professionals losing hours, days, or even weeks of work when disconnected. Employees need to

stay connected to Wi-Fi in order to do their job effectively, and businesses cannot afford to ignore the connectivity requirements of their mobile workforce. The financial cost of unproductive and unhappy employees can be severe, especially when you consider that some mobile professionals are connecting to Wi-Fi hotspots thousands of times per year.

In today's Wi-Fi-first world, mobile professionals need to be given the tools to get online instantly and remain productive wherever they are. After all, it's clear there's nowhere that mobile workers won't try using their smartphones!

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 dependency on mobile connectivity.

The survey was conducted between September 22, 2017 and October 14, 2017, representing mobile professionals across multiple age groups from North America and Europe. Responses were examined by region, age range and gender.

About iPass

iPass (NASDAQ: IPAS) is a 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 64 million hotspots in more than 180 countries and territories where iPass customers have connected successfully at airports, hotels, train stations, convention centers,

outdoor venues, inflight, and more. Using patented technology, the iPass SmartConnect™ platform takes the guesswork out of Wi-Fi, automatically connecting customers to the best hotspot for their needs. Customers simply download the iPass SmartConnect app to experience unlimited, everywhere, and invisible Wi-Fi.

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