Business Traveler Connectivity

An iPass Mobile Workplace Report

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iPass

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Executive Summary

This report summarizes the challenges faced by business travelers when looking for Internet connectivity when they're on the road. Getting connected to Wi-Fi is essential when the work needs to get done—from meetings, to online collaboration, to sharing files. Yet with more devices that are Wi-Fi dependent and the demand for high-bandwidth services—many in the cloud—they are faced with a number of challenges when they try to connect.

Business travelers hit the road with an average of three connected devices. Those devices make it possible for travelers to stay connected close to 100 percent of their waking hours. Respondents listed "lack of connectivity" as a huge challenge to business travel.

Business travelers spoke loud and clear: finding and accessing Wi-Fi is one of the top challenges they face when they travel. It's so important to them that the majority of business travelers haven't gone longer than four hours without connecting.

Looking at the big picture, business travelers really want four things from their Wi-Fi connection when they are on the road: cost, ease, security and ad-free.

Making Wi-Fi accessible for business travelers has emerged as a pressing business requirement.

> " The cost for a short period of time is more than my monthly service fee! "

> " It takes time to fill in all the details [to log in] and it's not worth it unless I'm going to use it. for a long time. "

1. *Fiscally-responsible access to hassle-free Wi-Fi.* They feel an obligation to be fiscally responsible when using their company's money for business expenses and the high cost of credit card Wi-Fi doesn't leave them with a good feeling.

2. *A single, consistent log-in across all networks so getting on is fast and easy.* Many reported their experience logging into so many different networks, with different log-in requirements, is as tedious and a time-waster. Often, after all that effort, respondents reported still having trouble making the actual connection.

> **I don't want to give my credit card details in public places.**

> **I hate the advertisements.**

3. *Personal security by eliminating the need to provide credentials, credit card numbers, etc.* **To use credit card-based Internet, travelers have to provide their credentials and credit card numbers wherever they are. This can put them in a vulnerable and risky position if they are at a public place like a coffee shop.**

4. *A friction-free experience without advertising and other noise that can interrupt business users.* **Before travelers can get online, they often have to deal with interstitials, advertisements and other disruptions that slow their ability to connect.**

It's a Wi-Fi First Culture

Wi-Fi connectivity is the method of choice, thanks to its speed, cost-effectiveness and bandwidth.

74 percent of business travelers would choose Wi-Fi over cellular data when traveling—if they can get it.

Almost 77 percent reported that simple Wi-Fi connectivity is their greatest challenge to productivity when they're on the road.

And 87 percent of respondents reported that they feel frustrated, annoyed, angry or anxious when connectivity isn't available.
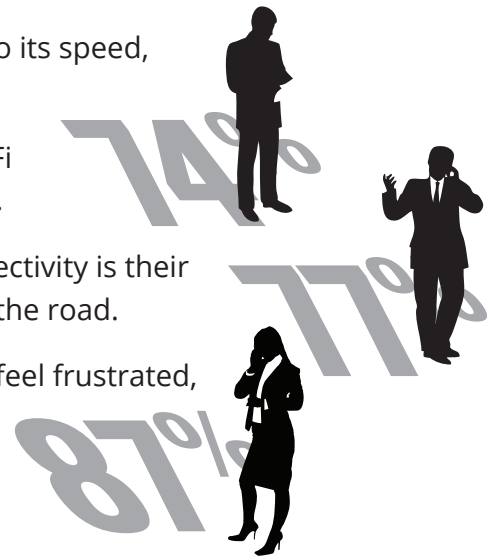
The fact is, business travelers don't just rely on Wi-Fi, they expect it.

In fact, Wi-Fi access in hotels and airports is expected, globally, by more than 90 percent of all travelers, regardless of region. They also expect access in cafes, airplanes and convention centers. While venues scramble to add as many hotspots as possible, the high percentage of travelers who say their expectations are not being met indicates that a gap still exists.

Wi-Fi is an Essential Business Ingredient

While away from home, business travelers want to connect with the things that matter most. When it comes to business, the need for access to high-bandwidth cloud applications like Skype, Microsoft Office 365, Salesforce, Lync, Google Apps, SAP and videos, means access to Wi-Fi is essential to make work happen.

Making connections extends to a number of critical activities. Here's what they reported as most important.

95% of respondents said that access to email is most important to them while traveling

55% rated access to online maps at their destination as *Important*

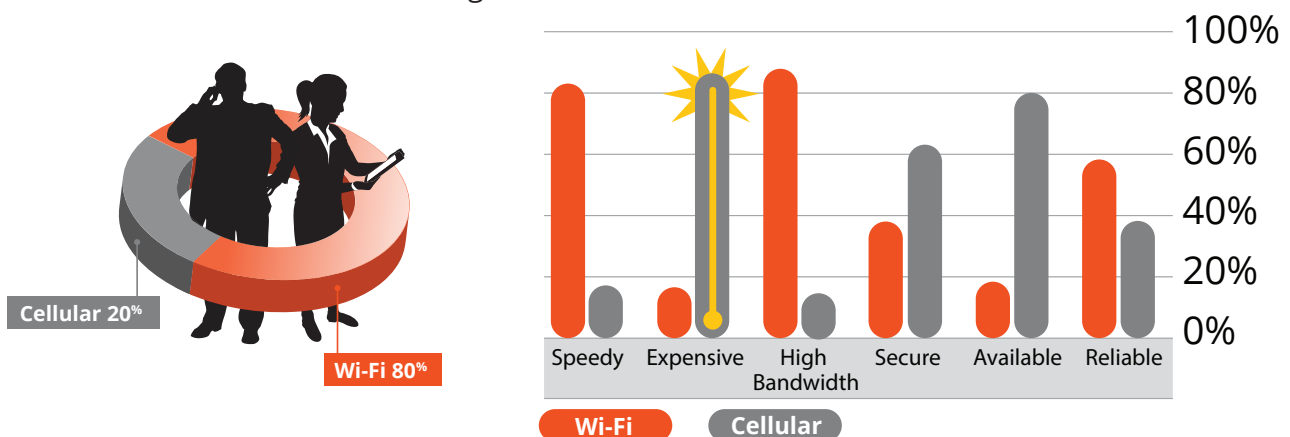**45%** want access to Skype or other types of videoconferencing to stay in touch with loved ones

43% want to access cloud business apps while traveling

Wi-Fi is Preferred over Cellular Data

Wi-Fi continues to be the first choice for mobile connectivity. Respondents overwhelmingly preferred Wi-Fi. 80 percent of business travelers prefer to use Wi-Fi over mobile data when working outside the office.

Why is Wi-Fi preferred? Respondents told us that Wi-Fi has notable advantages: it's faster, cheaper, offers higher bandwidth for video and cloud-based applications, and is more reliable than cellular data. The biggest advantage of cellular data is availability, but the expense associated with it is high.

Cellular 20%

Wi-Fi 80%

| | Speedy | Expensive | High Bandwidth | Secure | Available | Reliable |

Wi-Fi   Cellular

Tablets Increase the Need

Tablets are part of the global workplace. Often used as a lightweight laptop replacement, tablets are becoming the business device of choice. The result is that the demand for Wi-Fi has increased. Informa reports 75 percent of tablets sold today are Wi-Fi only. Our study found 70 percent of our respondents travel with a tablet.

We expect to see the use of tablets increase. 47 percent of respondents indicated that they expect to be using tablets more in 2014, and 45 percent said they expect to use smartphones more this year. Only 13 percent said they don't have a tablet. Interestingly, 36 percent of business travelers reported that they don't even use a desktop computer anymore.

Tablets are becoming the business device of choice.

Informa reports nearly **75%** of tablets sold today are Wi-Fi only. **70%** of respondents travel with a tablet.

47% expect to be using tablets more in 2014, and **47%** said they expect to use smartphones more this year.

Only **13%** said they don't have a tablet.

36% reported that they don't even use a desktop computer anymore.

Barriers to Using Wi-Fi

So why are business travelers so frustrated with Wi-Fi when they are on the road? 76 percent told us that simple access to Wi-Fi is a barrier to successful mobile working. Their expectations of Wi-Fi are not being met, particularly in critical locations such as airports and hotels.

Relieved 1%
Fine
Anxious 5%
Angry 5%
Fine 12%
Annoyed 31%
Frustrated 46%
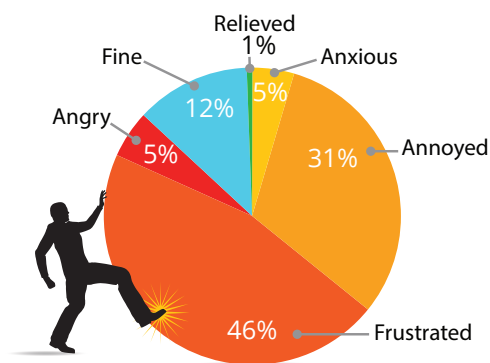
When traveling, if workers can't get connected, it's a problem. 87 percent of respondents reported that they feel "frustrated," "annoyed," "anxious" or "angry" when connectivity isn't available to them during travel. One European traveler's frustration was obvious: "It's 2014! Why is it so hard [to stay connected]?" In North America, a business traveler had practical reasons for annoyance. "If I can't connect, I have unproductive time," the respondent explained. "That generally ends up eating into sleep time later, since I have stuff to get done."
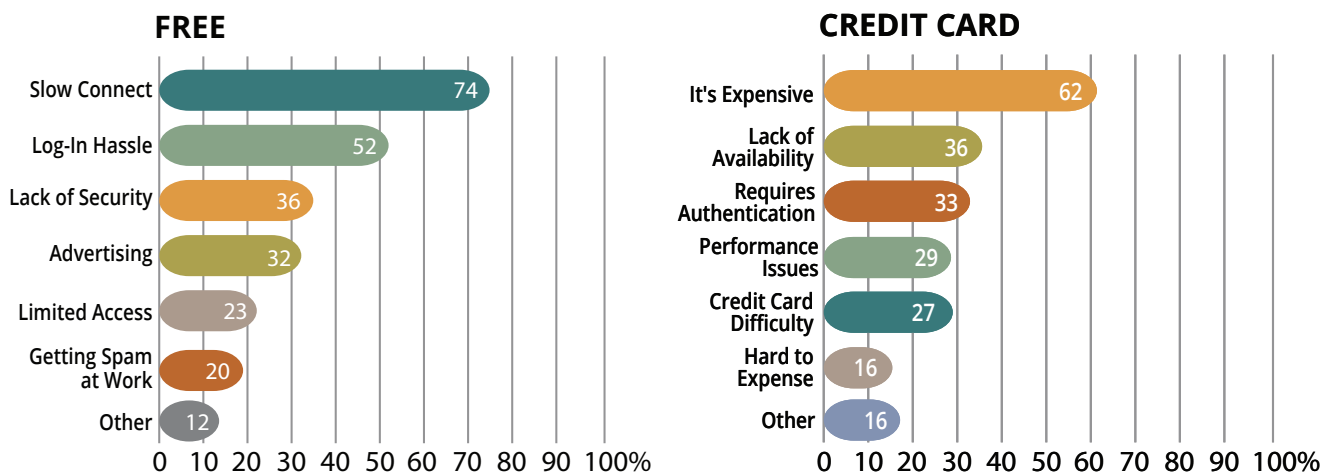
Another agrees, saying, "The more urgent the work is, the more frustrated, mad and annoyed I become."

When it comes to airplanes, 60 percent expect in-flight Wi-Fi and 58 percent are disappointed when they don't have access. Based on what's available today, 63 percent felt that in-flight Wi-Fi was both too expensive and not available on enough planes.

The Challenges of "Transient" Wi-Fi

There are intrinsic problems with transient Wi-Fi: (both free services and access via credit card purchase). Here are the challenges business travelers experience with these kinds of services:

- 36% of free Wi-Fi users suffer from a lack of confidence in security, and 32% report that having to deal with intrusive advertising is a nuisance.

- 63% of users feel that fee-based Wi-Fi is overpriced, and they hate the hassle of having to enter their credit card details (27%).

- Both free and fee-based Wi-Fi users endure cumbersome log-in and registration processes (53% and 33% respectively), which creates friction for users.

FREE

Category	Value
Slow Connect	74
Log-In Hassle	52
Lack of Security	36
Advertising	32
Limited Access	23
Getting Spam at Work	20
Other	12

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

CREDIT CARD

Category	Value
It's Expensive	62
Lack of Availability	36
Requires Authentication	33
Performance Issues	29
Credit Card Difficulty	27
Hard to Expense	16
Other	16

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

The result of these barriers is that business travelers report not being willing to pay the high fees required by credit card-based services. In our study we found more than 75 percent saying they seldom (40%) or never (36%) purchase these services when they are traveling for business.

Conclusion

Our world is changing with the unprecedented growth of smartphones and tablets driven by cloud computing. Business travelers are now mobile first and that translates to Wi-Fi first. Unfortunately, in today's ad hoc Wi-Fi word, there's a gap between the promise of connectivity and mobile devices—and it's fueled by fragmented networks owned by private venues (like Starbucks and Hilton). This ad hoc mega-network creates pain for business people who are on the move and simply want to get their jobs done—no matter where they are.

iPass is working to close the gap by providing easy network connectivity no matter where the work is getting done. We deliver when people need us most. We are focused on delivering:

- A single log-on for users so getting online is fast, easy and private.

- Personal security so email, credentials, credit card numbers, etc. are protected. They shouldn't be required to log onto a network.

- A cost-effective solution so businesses can plan expenses and travelers don't have to micro-manage their finances to get their jobs done.

- A friction-free experience that doesn't interrupt business people trying to work or connect with the ones they love.

We offer high-performance network connections with 95 percent coverage at the top 100 airports around the world. We are also available on 21 participating airlines and on Wi-Fi equipped aircraft. We are available on trains in Switzerland, Denmark, the UK, Germany, Ireland, Japan, China and the US. We also have venues that include more than 72,000 hotel and convention center locations, and millions of hotspots in urban areas, restaurants, cafes, outdoor venues, retail stores, etc.

We want to make sure business travelers can connect to the things that matter most.

Survey Methodology

This report is based on information obtained from 2,202 respondents to an iPass survey of business travelers and mobile workers. Survey respondents were asked about their connectivity habits, preferences and expectations while on a business trip, and were asked to provide opinions about their dependence level on mobile connectivity from all devices, emotions about connectivity and barriers to successful mobile work.

The survey was conducted between December 12, 2013 and January 17, 2014 and represented employees across multiple age groups and geographies. 37 percent of respondents came from North America, and 38 percent were from European Union countries; 12 percent came from the Asia Pacific region, and nine percent came from the Middle East. Smaller percentages, representing six percent of the survey totals, responded from Africa, South America, Central America, or other regions. Responses were examined by region, age range and gender, and represent a cross section of the average business traveler around the world.

Specifically, 90 percent of respondents are highly experienced business travelers. 40 percent of respondents said they travel more than ten times a year, or approximately every month, and 20 percent reported between six and ten business trips annually; another 30 percent travel up to five times per year.

About iPass

With the world's largest commercial Wi-Fi network and trusted connectivity platform, iPass provides seamless connectivity virtually anywhere. With more hotels, airports, planes and business venues than any other network, iPass reduces the cost of mobility and improves user productivity on Smartphones, tablets and laptops. Try iPass for free—get a 14-day trial for your organization or a 24-hour trial for individual users: ipass.com/try-it. Or, for more information contact iPass: ipass.com/contact-ipass/.

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