



Wi-Fi Intelligence

Holiday Hotspots

A Wi-Fi Roaming Case Study



Holiday Hotspots: A Wi-Fi Roaming Case Study

7,800
Customers

+40
Countries

Devicescape Network Usage
April, 2017

1.5TB
Wi-Fi Data

243k
Wi-Fi Hours

Most of us can't do without Wi-Fi when we're on holiday.

But how much time do we actually spend on Wi-Fi, where do we use the most Wi-Fi, and how can operators help their customers to get and stay connected?

To find answers to these questions, Devicescape studied the roaming Wi-Fi usage of 7,800 UK smartphones during April 2017.

All smartphones in the study had Devicescape software installed, which automatically connects devices to the Devicescape Curated Virtual Network (CVN) of high quality public Wi-Fi, in the UK and abroad.

Access To Wi-Fi Is A Holiday Essential

40% of travellers in the 16 – 24 age group consider access to free Wi-Fi more important than a swimming pool or easy access to shops and bars.*

77% of British holidaymakers use social media on holiday, rising to 90% in the 16 – 24 age group. 34% post to social media throughout their vacation.*

Almost one quarter of UK mobile users have been hit by big roaming bills. 17% have spent £75 or more and one in ten have incurred charges of more than £100.**

30% of users have suffered bill shock as a result of forgetting to switch off data roaming and 27% because they wrongly thought they had Wi-Fi switched on.**

The importance of Wi-Fi to the holiday experience is well documented, as are the financial risks of using mobile data while overseas.

Devicescape software auto-activates smartphones' Wi-Fi radios when it senses devices are roaming, making sure users stand the best chance of a great free connection, and helping to protect customers against bill shock

* <https://www.aviva.com/media/news/item/uk-sun-sea-and-selfies-has-social-media-killed-the-holiday-postcard-17781/>

** <https://www.uswitch.com/media-centre/2017/04/holidaymakers-beware-brits-risk-3000-holiday-roaming-bill/>

Key Findings

1. We Use A Lot More Public Wi-Fi On Holiday

Travellers to the US
consumed almost 12x
the amount of public
Wi-Fi they would
typically use in the UK

UK Smartphone users are far more dependent on public Wi-Fi when travelling overseas than they are at home.

Our study revealed that travellers to the U.S. consumed almost 12 times as much data over public Wi-Fi as they would during the same period of time in the UK.

Across all countries surveyed, travellers spent between 1.5 and 9 times as many hours connected to public Wi-Fi, on average, as they typically do at home.

2. Auto-Connectivity Has A Dramatic Impact

**Auto-Connectivity
accounted for 30% of
all time on Wi-Fi,
effectively increasing
time spent connected
by more than 40%**

The study showed that the need for connectivity drives people to manually connect while they're travelling.

However, good quality Wi-Fi is not always easy to find, users can become 'black-holed' in broken captive portals, and connections can be easily lost.

Our findings indicate that automatically connecting smartphone users to good quality Wi-Fi means they stay connected for longer.

On average, auto connectivity accounted for one third of time spent on Wi-Fi at the 10 most popular destinations.

3. Wi-Fi Saves Travellers A Fortune

CVN usage exceeded
100MB / user at 15
long haul destinations,
saving customers
thousands of Pounds in
data roaming charges

Average data consumption on Devicescape's CVN ranged from 27MB over the duration of the trip in one long haul destination up to 400MB in another.

Mobile data charges for long haul destinations from some UK operators can be as high as £8/MB.

Some operators recommend their customers search for Wi-Fi to help keep costs down.

Devicescape-enabled operators auto-connect customers to great quality Wi-Fi, delivering connectivity which would cost thousands on the mobile network.

Results In Detail

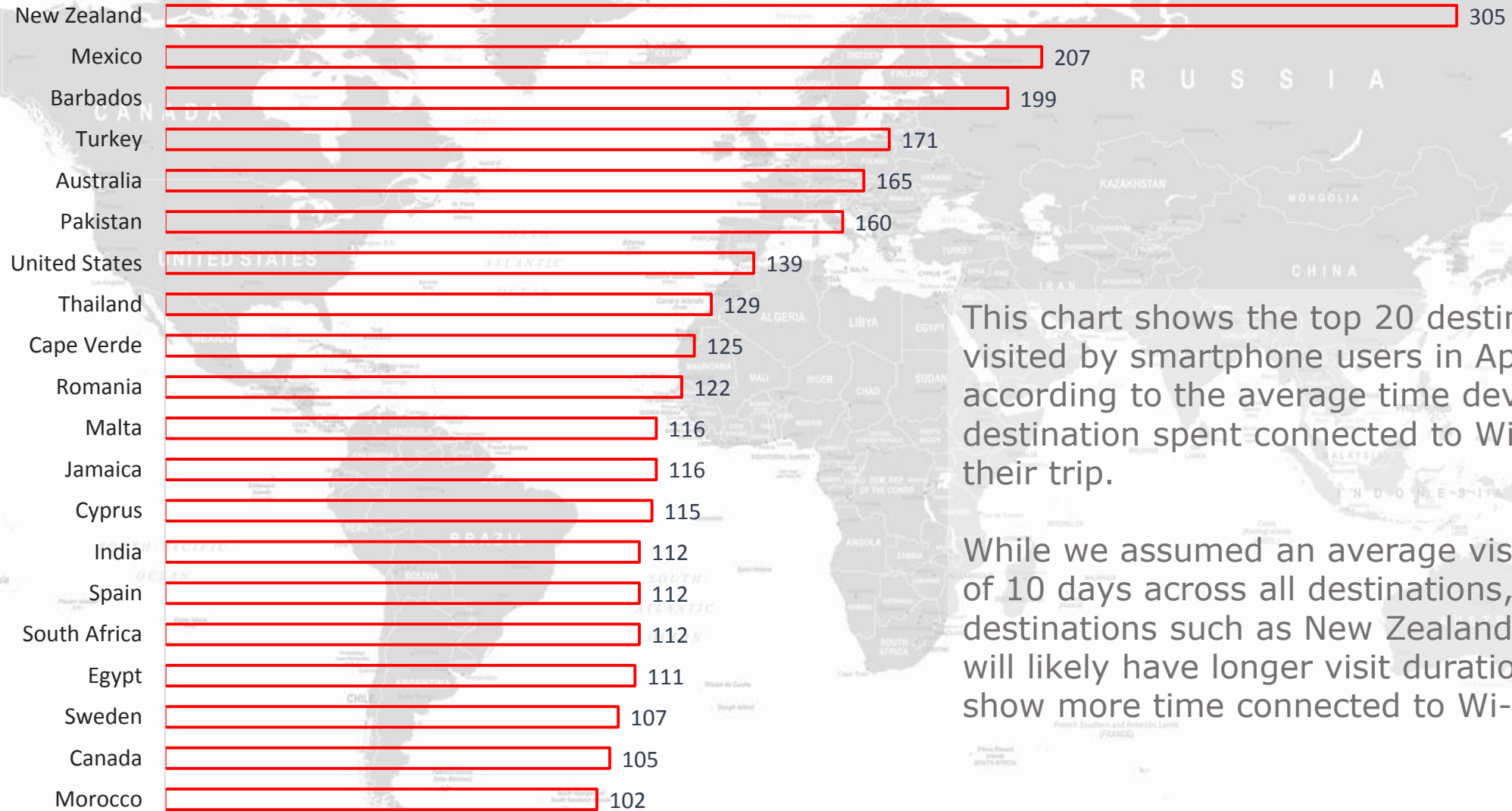
UK Smartphone Users Travelled Far And Wide

10 Most Popular Destinations:

1. Spain
2. France
3. USA
4. Portugal
5. Italy
6. Ireland
7. Germany
8. Netherlands
9. United Arab Emirates
10. Cyprus



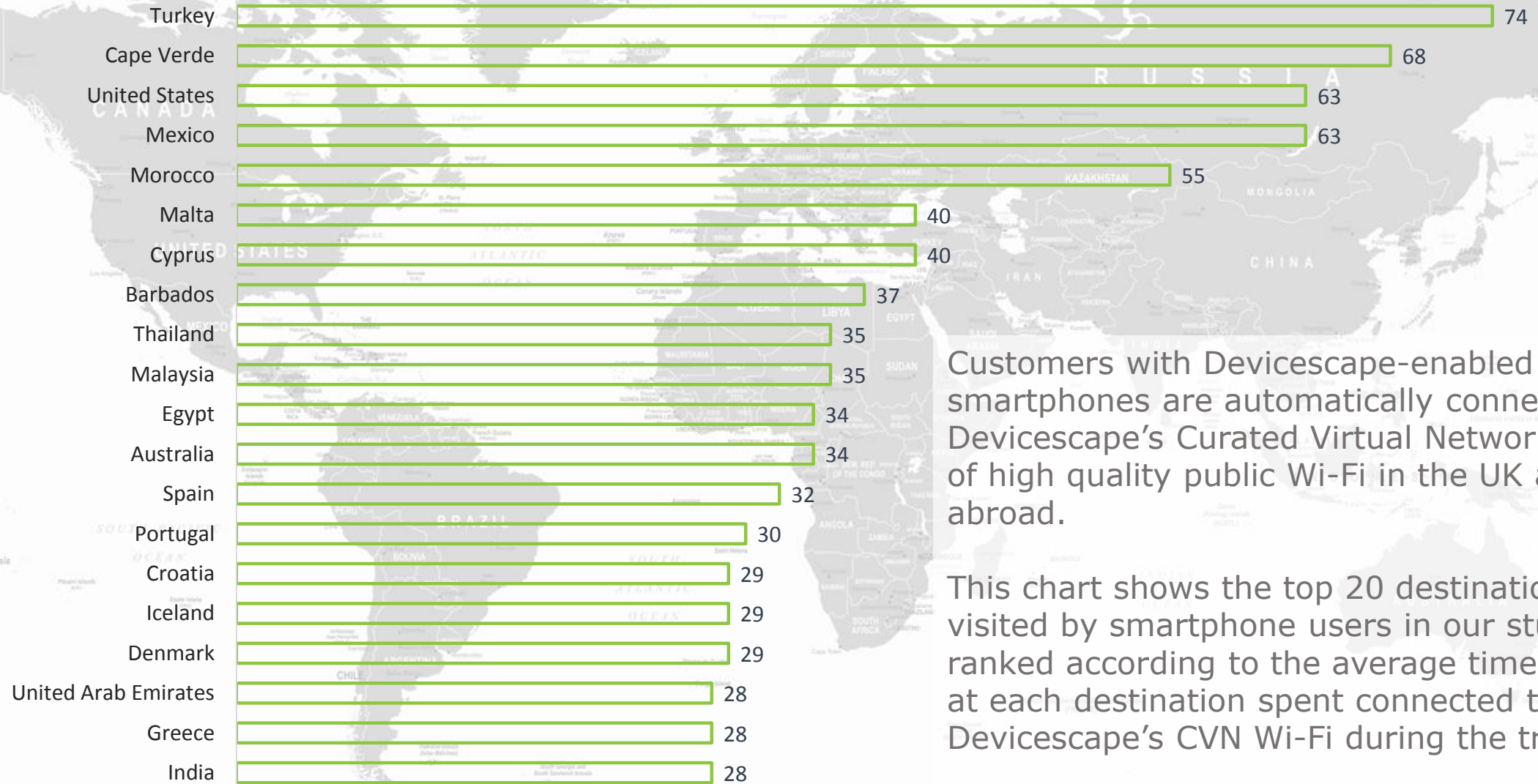
Average Total Wi-Fi Hours / Device



This chart shows the top 20 destinations visited by smartphone users in April, ranked according to the average time devices at each destination spent connected to Wi-Fi during their trip.

While we assumed an average visit duration of 10 days across all destinations, long haul destinations such as New Zealand and Mexico will likely have longer visit durations, and show more time connected to Wi-Fi.

Average CVN Wi-Fi Hours / Device

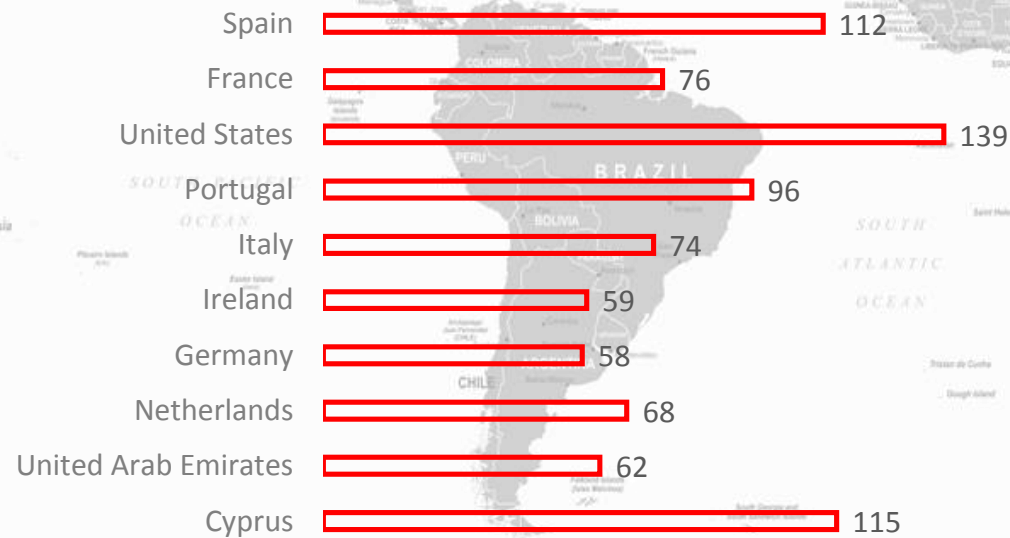


Customers with Devicescape-enabled smartphones are automatically connected to Devicescape's Curated Virtual Network (CVN) of high quality public Wi-Fi in the UK and abroad.

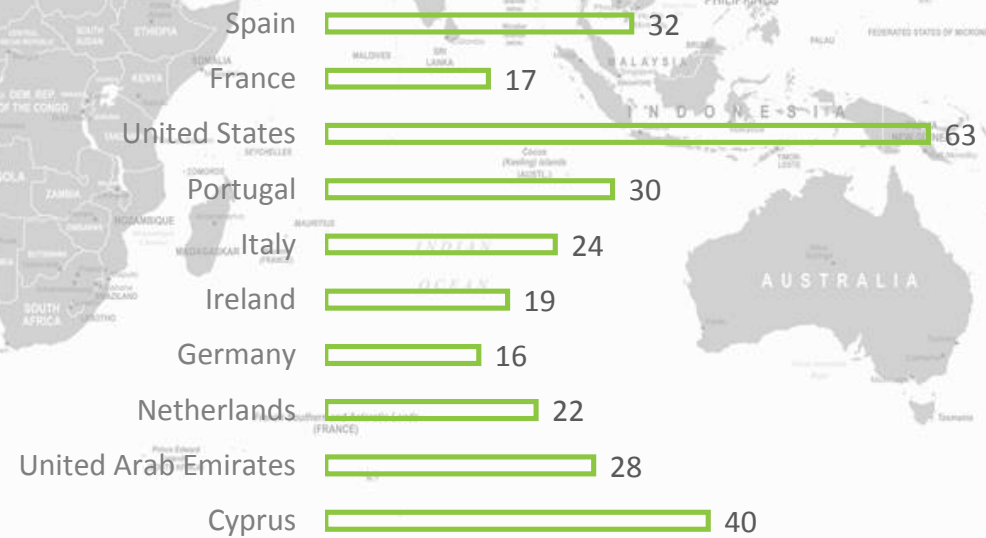
This chart shows the top 20 destinations visited by smartphone users in our study, ranked according to the average time devices at each destination spent connected to Devicescape's CVN Wi-Fi during the trip.

Wi-Fi Usage At 10 Most Popular Destinations

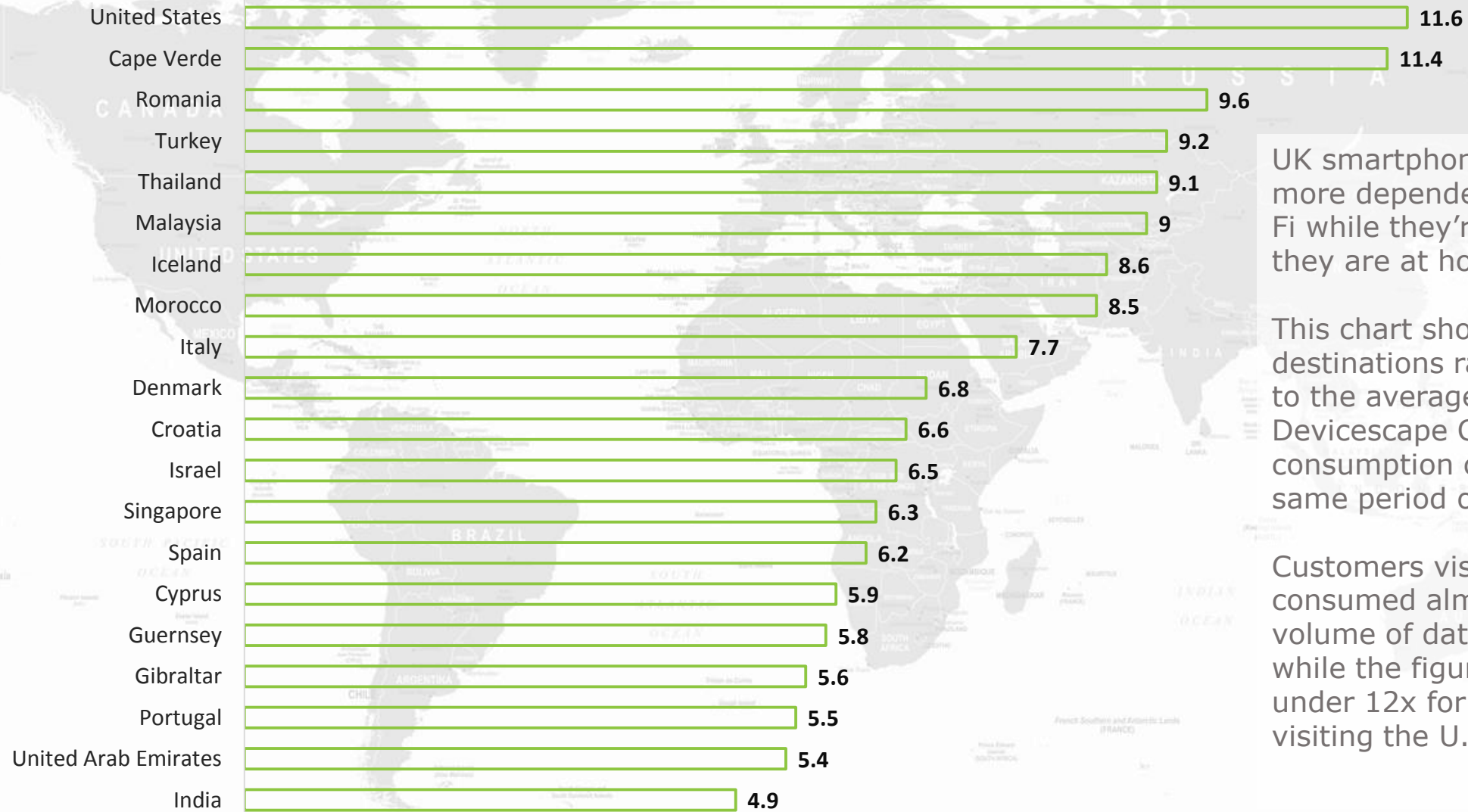
Average Total Wi-Fi Hours / Device



Average CVN Wi-Fi Hours / Device



Destinations By Factor Increase In CVN Wi-Fi MB

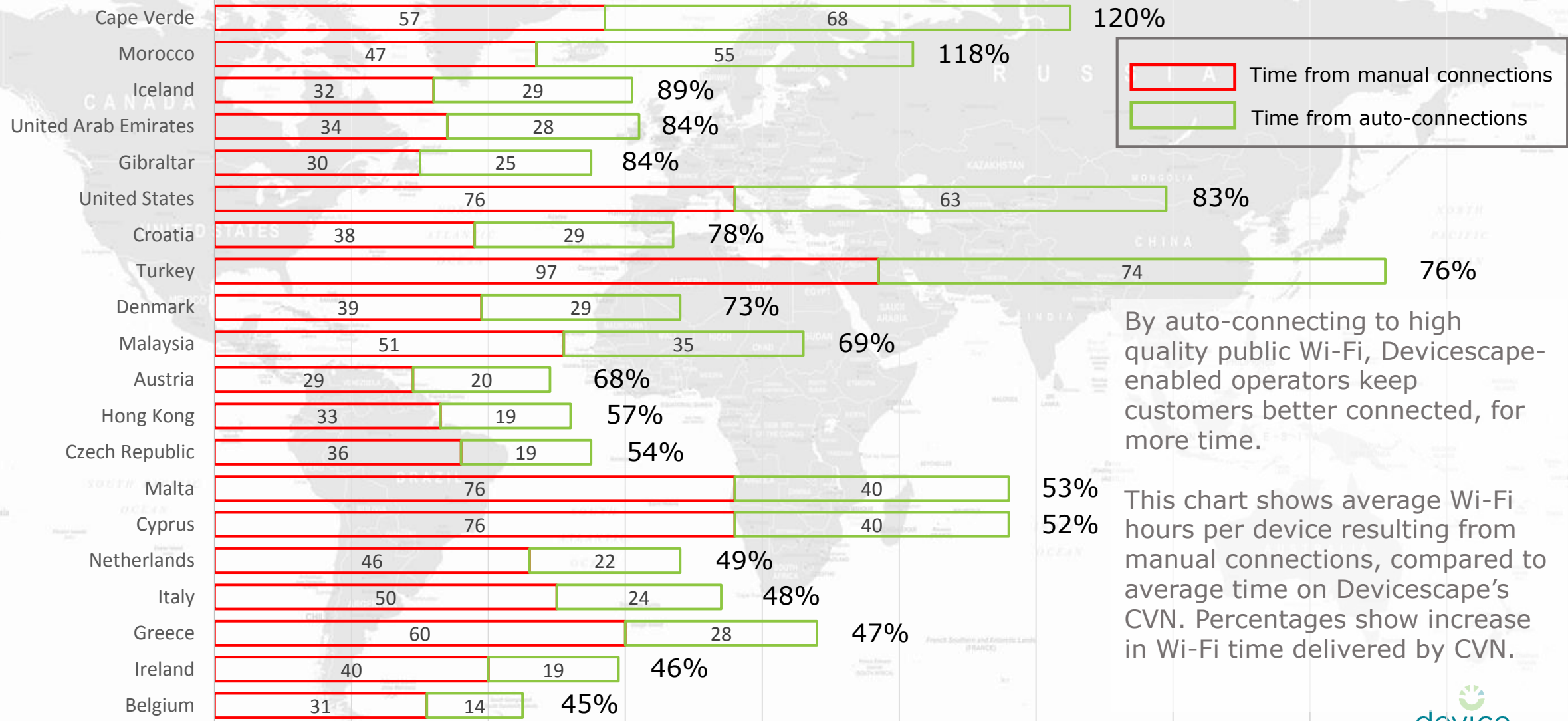


UK smartphone users are far more dependent on public Wi-Fi while they're on holiday than they are at home.

This chart shows the top 20 destinations ranked according to the average increase in Devicescape CVN Wi-Fi data consumption compared to the same period of time in the UK.

Customers visiting Italy consumed almost 8x the volume of data over the CVN, while the figure rose to just under 12x for customers visiting the U.S.

Impact Of Auto Connect On Hours Of Wi-Fi



By auto-connecting to high quality public Wi-Fi, Devicescape-enabled operators keep customers better connected, for more time.

This chart shows average Wi-Fi hours per device resulting from manual connections, compared to average time on Devicescape's CVN. Percentages show increase in Wi-Fi time delivered by CVN.

Conclusions And Takeaways

With the smartphone second only to the passport in importance for many UK travellers — and mobile roaming charges remaining high outside of the EU and unpredictable within it — access to Wi-Fi is a holiday essential. As this Case Study shows:

- Smartphone users are heavily dependent on public Wi-Fi for data connectivity while travelling internationally
- Both time spent connected to public Wi-Fi and the volume of data consumed over public Wi-Fi increase significantly for roaming users.
- Automatically locating and connecting customers to high quality public Wi-Fi, as Devicescape-enabled operators do, greatly improves customers' time spent connected.
- Auto-connecting customers to quality public Wi-Fi while travelling internationally helps them to save significant sums on mobile data roaming costs.

Devicescape enables brands and service providers to auto-connect customers to high-quality Wi-Fi — and deliver targeted proximity engagement messages — at numerous popular consumer destinations. At the heart of the Devicescape solution is the Curated Virtual Network of more than 300 million Wi-Fi access points worldwide. One network, millions of locations, limitless opportunities to connect and engage.



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