



ARE YOU READY FOR

#GenMobile?

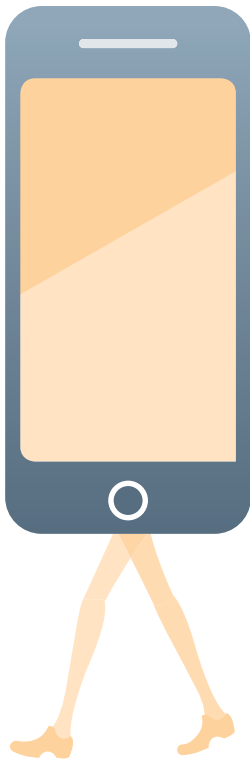
**How a new group is changing the way we
work, live and communicate**

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NETWORKS

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EXECUTIVE SUMMARY



We're on the move more than ever before: from increased global travel, to our escalating use of mobile devices on a daily basis. Let's face it, tweeting on smartphones and browsing on tablets have become as much a part of our day-to-day routines as brushing our teeth and getting dressed.

This increasingly mobile world has produced a new generation. #GenMobile are a group of people for whom smartphones have gone beyond personal entertainment and BYOD. In fact, they're now shaping their lives, especially their working lives, around mobile devices.

This report will give you a greater understanding of just how to spot #GenMobile, what they expect in the workplace and how, as an employer, you can best cater to their mobile needs.

#GenMobile covers respondents of all ages. We have also defined a younger #GenMobile group via a cross-section of the survey base who showed the highest preference for mobility at home and work. The younger #GenMobile group happen to be between the ages of 18-35.

#GenMobile believes...

in working anytime, anywhere

in purchasing mobile devices
more than other groups

in a more connected world, from cars to clothing



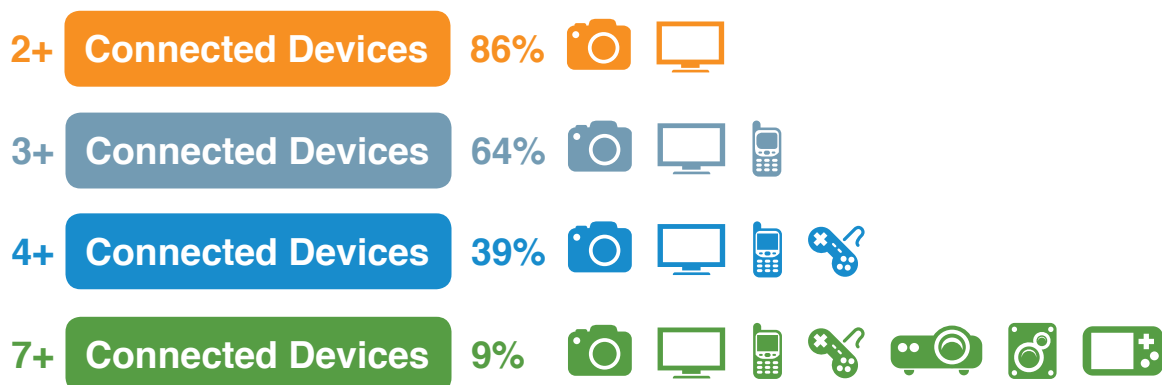
SURVEY RESULTS

Hold the phone: mobile leads the way

Aruba Networks has recently completed research to take stock of mobility's increasing prominence in our working lives. The online survey, carried out in November 2013 by Shape the Future, asked over 5,000 members of the public across the USA, UK, France, Spain, Germany, Sweden, South Africa, Saudi Arabia and UAE.

The aim of the research was simple: to expose how enterprise workers use their mobile devices in and out of the workplace and the importance of mobile devices to their lifestyles. The research showed that 86% of all respondents have two or more connected devices (those with the ability to connect to the internet), and nearly two thirds (64%) already own three or more connected mobile devices. Another 39% own four or more. The prevalence and effectiveness of tech devices is affecting the way we choose to work, in and out of the office, and this report will reveal how companies need to shape up for a generation of mobile-ready workers.

Worldwide mobile trends: How many connected devices do you own?



INTRODUCTION

Welcome to a new working world

Like it or not, we live in a world where our smartphones occupy nearly every pause in our day. Chances are your phone is on your desk, in your pocket, or in your bag right now.

The connected nature of today's technology means a close friend, or indeed that demanding work client, is only a text or email away. It also means stepping out of the office door, doesn't mean you've left work – for good and for bad. And this presents both challenge and opportunity.

Now, the notion of 'traditional' working hours is slipping away. Mobile devices allow us to hop on to Wi-Fi connections and work when we're not at 'work', making flexible working the order of the day. This is not borne out of laziness however; 45% of respondents say they work most efficiently before 9am or after 6pm. Introducing flexibility in the working day could help increase productivity.

Technology is giving us the choice, and the ability, to work outside of customary remits. As a result, employers need to consider whether their present regulations are becoming outdated. Particularly as 70% of people prefer flexible working than working 9 to 5 with an early finish on Fridays.

The demand for flexible working hours is not simply a nice-to-have, it's now a top priority. Over half of those surveyed said they'd prefer to work from home or remotely two to three days a week than receive a 10% higher salary. Therefore, flexibility might be an opportunity for companies to create cost-savings, as well as improve productivity.

Working out of the office is also on the up. Globally 37% expect an increase of remote working – just 4.5% foresee a decrease. By country, those in South Africa are likely to increase their remote hours by the most, with almost a quarter (23%) expecting an increase in remote working of over 25%.

For younger #GenMobile, this leaning towards remote working is amplified: 49% of the group forecast an increase in the time they spend working remotely in 2014.

The demand for flexibility is just one of the markers of a member of #GenMobile, of course. As

WE LOVE MOBILE DEVICES MORE THAN EVER

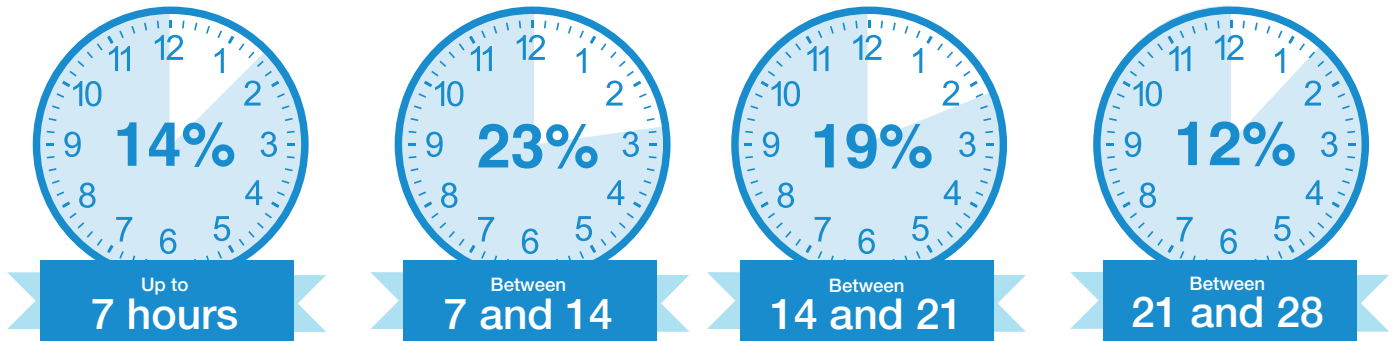
this report will reveal, trends for mobile device usage and the overwhelming preference for Wi-Fi connectivity over other forms of connectivity, look set to be extended still further by this new generation.

We love mobile devices more than ever

Mobile devices are everywhere – and their popularity shows no signs of abating. A third of us spend over a third of our day on mobile devices. Smartphones are still proving to be the go-to tech device, and was the most popular device bought across the globe last year, with over half (51%) of consumers purchasing them. However this figure was 70% for the younger #GenMobile respondent.

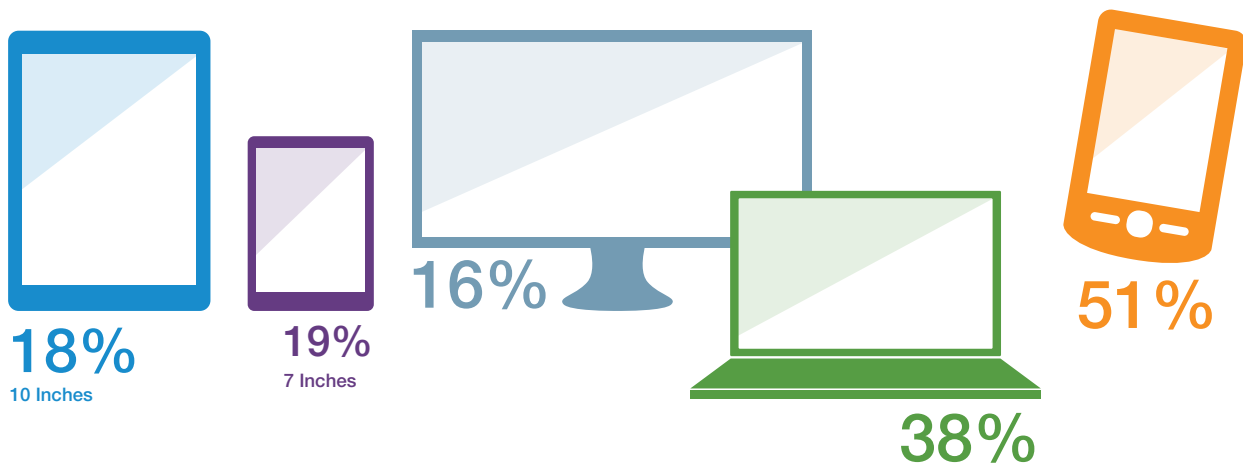
How many hours in your week are spent ‘mobile’?

Tablets, while slightly less prevalent, continue to prove a hit. Almost half (45%) of those



surveyed have bought tablets in the past 12 months. Somewhat unsurprisingly, these device purchasing habits are being driven by younger #GenMobile – who are acquiring more devices than any other demographic.

Which of the following technology devices have you bought or been given in the past twelve months?



Interestingly, over a third (35%) of consumers revealed they bought or had been given Wi-Fi-enabled audio or video entertainment equipment in the past 12 months (speakers, TVs, consoles). Clearly there is a drive towards more personal connected tech in the home – as well as in the workplace. Again, the younger #GenMobile is more interested in connected devices than any other group, with connected cars (54%), clothes (17%) and wallets (19%) of particular interest. While interest in connected cars may be expected, there is a clear demand from younger #GenMobile for the technology to go further, with almost a fifth expressing an interest in connected clothes and shoes. Employers need to pay attention to this demand for a more connected world.

The top 'connected' devices consumers plan to buy in the next 12 months

	All #GenMobile	Younger #GenMobile
Large tablets (~10 Inches)	16%	26%
Smaller tablets (~7 inches)	12%	19%
Laptop computer	18%	26%
Smartphone	23%	36%
Smart TV	11%	17%



#GenMobile are so attached to their mobile devices that they are 15 times more likely to give up coffee and seven times more likely to say goodbye to their televisions than their beloved smartphones.

While 64% of global consumers claim that their mobile devices make them more productive at work, it's worth noting that almost the same number (63%) of consumers still appreciate 'disconnected' time.

What smart/connected technology would you most like see in everyday use in the next five years?



All #GenMobile

45%

Younger #GenMobile

54%



All #GenMobile

31%

Younger #GenMobile

33%



All #GenMobile

14%

Younger #GenMobile

18%



All #GenMobile

11%

Younger #GenMobile

17%



All #GenMobile

9%

Younger #GenMobile

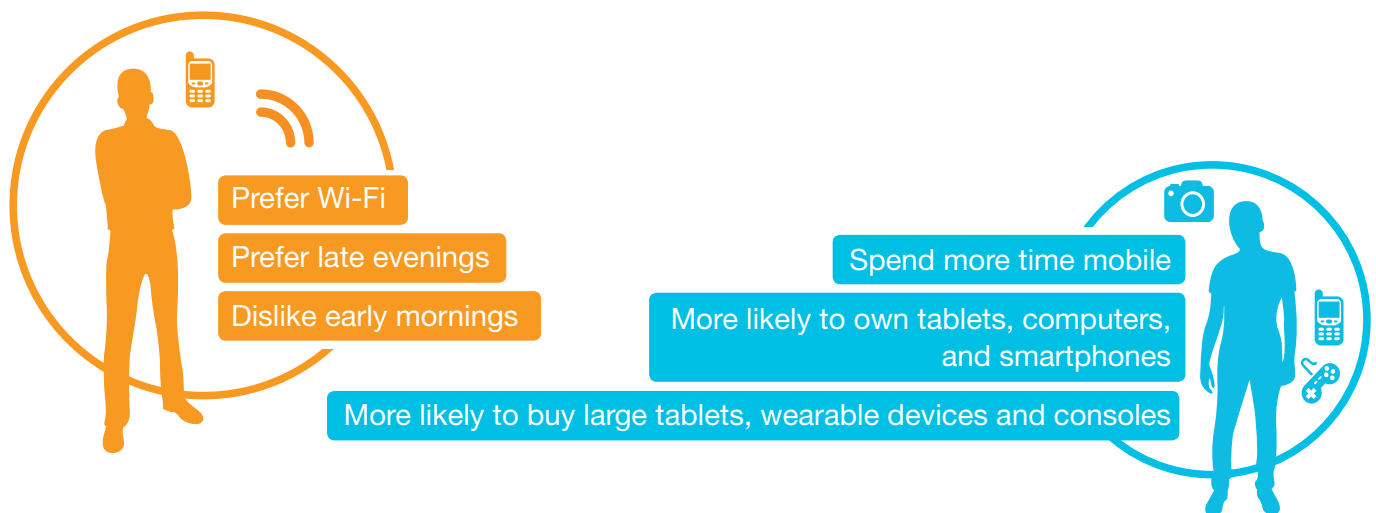
14%

HOW TO SPOT #GENMOBILE

We've talked a lot about this new generation afoot, but how do you go about identifying them? Well, it's a group defined by their preference for mobility – both in terms of the tech devices they use, and their approach to work. #GenMobile abides by the 'anywhere, anytime' principles of flexible working, where office hours are no longer constrained to the traditional workday.

It's important to remember that workforce talent is hidden in younger #GenMobile. So understanding, and then playing to, their needs will ensure your company is in a competitive position. The younger #GenMobile are more likely than other groups to access mobile apps such as Facebook (17%) and Twitter (14%). But they are also 20% more likely to access and respond to work emails on their mobile device. For #GenMobile, mobile is second nature to both a work and personal life.

So how do you go about spotting #GenMobile?



EMPLOYERS

#GenMobile: 3 things you didn't know about them

1. Nearly a half prefer non-traditional working hours (outside of 9am-6pm). Nearly a third (29.3%) of those prefer to work during late evenings
2. Almost two thirds (63%) think their mobile devices help them manage their lives better
3. That said, 64% of #GenMobile still appreciates 'disconnected' time when they can disengage from their devices.

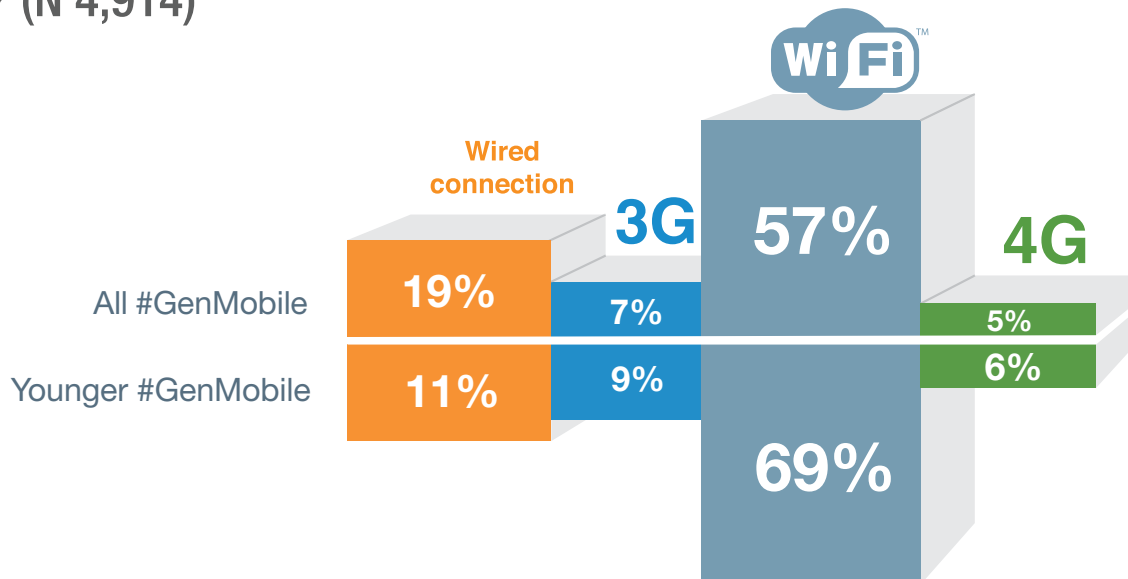
Employers: Providing untethered work options

The rise of #GenMobile leaves organisations with an opportunity. Over a quarter (28.9%) of those surveyed feel it is their company's responsibility to provide them with a smartphone or a tablet. Added to that, a further 29.2% would prefer to buy their own – but clearly see connected devices as a workplace necessity. The demand for employers to provide employees with smartphones or tablets increases in Spain (46.1%), South Africa (34.7%), UAE (54.9%) and Saudi Arabia (52.9%).

Alongside this demand for connected devices, employers need to take heed of employees' requisite internet requirements. The majority of respondents (80%) already want wireless over wired connectivity. But newer technologies like 4G and 3G are only preferred by 5.2% and 6.9% of us respectively. With 58% of the survey respondents and 69% of younger #GenMobile stating their preference for Wi-Fi, this appears to be the overwhelming choice of current and future employees.

Clearly, these trends call out an important concern for employers. They need to ensure the correct security measures are in place if employees are storing company information on mobile devices. What's more it's essential to ensure the internet connections used, particularly Wi-Fi, are safe and protected.

Which type of network do you prefer to use when connecting to the internet? (N 4,914)



Although at an earlier stage in their career and likely on the lower end of the salary scale, 49% of younger #GenMobile would rather work from home or remotely than receive a 10% higher wage. The same percentage would rather receive a device from their employers than lunch, and nearly two thirds (63%) state their preference for flexible working over a fixed office cubicle.

Mobile around the world

- Germany looks to be leading the way in mobile working models. Already 14% of respondents here indicate that they spend more than 8 hours per day (56 hours per week) on their mobile devices.
- In the US and Saudi Arabia, most people (55% and 59% respectively) prefer to work before 9am or after 6pm rather than more traditional working hours.
- The Spanish are the most entertainment gadget-friendly; with 68% having bought a connected TV, speakers or games console in the past twelve months.
- The UAE are the most pro-Wi-Fi with 75% indicating it is their network of choice.
- The UK continues to be a nation obsessed with mobile shopping – 56% of respondents here are already avid users.
- The French are the least trusting of mobile banking - 51% do not use it – but 76% of respondents in Sweden do make use of this service.



CONCLUSION

Be connected, be competitive

Mobility and mobile devices have become a more integrated part of everyday, including an anytime, anywhere working life. #GenMobile want flexible working hours, and mobile work stations with Wi-Fi connectivity. But more importantly, it's younger #GenMobile who really want flexibility and remote working. So employers that wish to attract #GenMobile must keep their needs front-of-mind.

To put themselves in a competitive position, and stand themselves in best stead for securing future #GenMobile talent, organisations need to be willing to buck traditional working hours, and typical working environments. While providing a secure Wi-Fi connection for their connected devices too.

If your organisation isn't ready for #GenMobile, you need to be soon – or risk losing out to the better-connected competition.

Key takeaways: How to prepare for #GenMobile

- Employees increasingly expect connected mobile devices to infiltrate their working lives. Most of them prefer Wi-Fi over any other form of connectivity. Employers need to set aside ample budget for making their workplace fully connected for employees – with the security and connections available to facilitate this shift.
 - Flexible and remote working is a top priority for #GenMobile. With the traditional 'productive' working hours slipping away, many people would preference working remotely over a higher salary. Employers need to put measures in place to cater to this growing need to work outside traditional office hours, or risk frustrating #GenMobile.
 - By taking into consideration #GenMobile's demands and priorities, companies will be able to position themselves competitively and consequently, attract and retain #GenMobile talent. Their ability to provide flexibility and mobility will become differentiating factors in the market.
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- For additional information, visit www.arubanetworks.com/allwireless/.