LETTER FROM THE PRESIDENT

Nick Hulse

When I joined Boingo, I made connecting with our partners and understanding their challenges and goals my top priority. I learned that our customers were eager for a better understanding of their traveler base, more detailed data on wireless usage, and an opportunity to share feedback directly.

In response, we bolstered our team of account managers, increased the detail and frequency of our reporting, and instituted quarterly, in-person business reviews, to better share information and understand your ongoing needs.

To lead our continued investment in products and services that benefit airports and passengers, I am delighted to introduce Marc Patterson, our new vice president of product management.

Marc brings more than 20 years of customer-focused experience in wireless and mobility to Boingo, most recently as vice president and general manager of Mobile Data Services at BT Global Services.

This year, Marc will focus on three overarching deliverables for our airport partners:

Marc Patterson

Developing Next Generation Networks
We are developing networks to next generation standards, which will provide increased speeds and greater network flexibility. We've kicked off 2014 by launching Passpoint-enabled Wi-Fi networks at 21 airports, providing seamless access for passengers to secure Wi-Fi networks. We are also developing tiered wireless offerings to serve the most prevalent passenger use cases, to ensure that all travelers enjoy an even better connected experience.

Innovation in Customer Engagement
To help airports provide an enhanced, mobile-first experience to their travelers, Boingo is delivering new content management tools, enhanced survey capabilities, and a suite of location-based services that provide increased passenger visibility to airports.

Consumer Behavior and Experience Visibility
Boingo is also enhancing analytics offerings for partners. We are working to provide advanced insights into your networks and their performance, as well as visibility into passenger behavior. Our standard reports are already available, and soon our reports will align experience data with advanced analytics to provide more robust insights into passenger preferences.

As always, we would love to hear from you. I can be reached at nhulse@boingo.com, and Marc can be reached at mpatterson@boingo.com.

My very best,

Nick Hulse, President
Boingo Wireless

Airport Wi-Fi Usage

On average, **24%** of departing passengers use free Wi-Fi at U.S. airports.
However, the range varies from a few percent to almost 35% depending on the quality
of the network and dwell time (from the time they clear security to boarding).

Data Consumption

Q3 2013 → **Q4 2013** **+22%**

Data consumption across Boingo's U.S.
airport network increased **22% in Q4 2013.**

44 MB

Airport Wi-Fi users typically consume
44 MB of data per session.
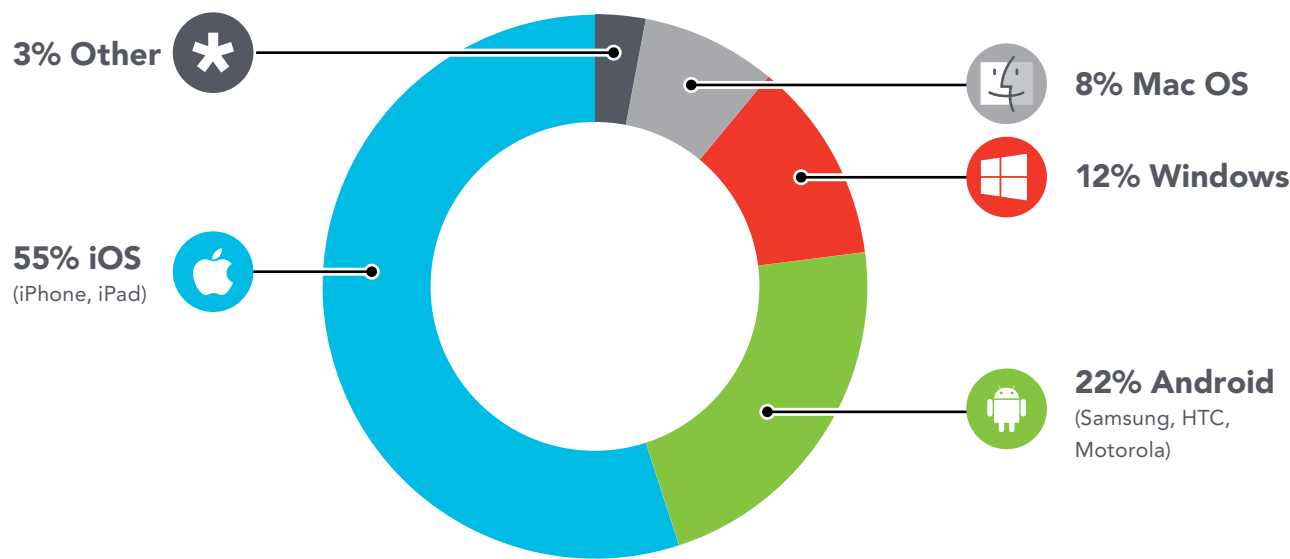
Device Type

55% Mobile

24% Tablet

21% Laptop

Mobile devices like smartphones continue to represent the majority of devices connecting to airport Wi-Fi. Tablets represent nearly one in four devices, and laptop usage remains steady accounting for one in five devices.
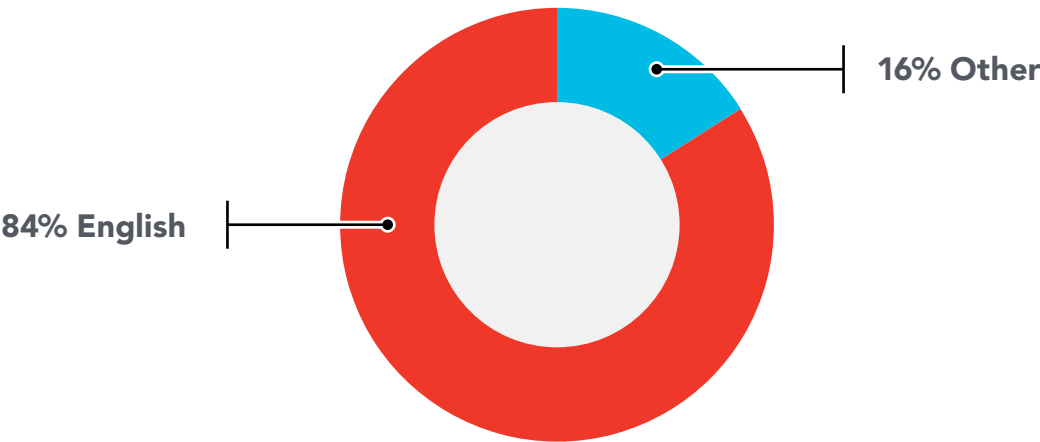
Operating System

3% Other

8% Mac OS

12% Windows

55% iOS
(iPhone, iPad)

22% Android
(Samsung, HTC, Motorola)

More than half of airport Wi-Fi users continue to connect with Apple devices on the iOS platform (iPhones and iPads), and nearly one-quarter use Android-powered smartphones and tablets.
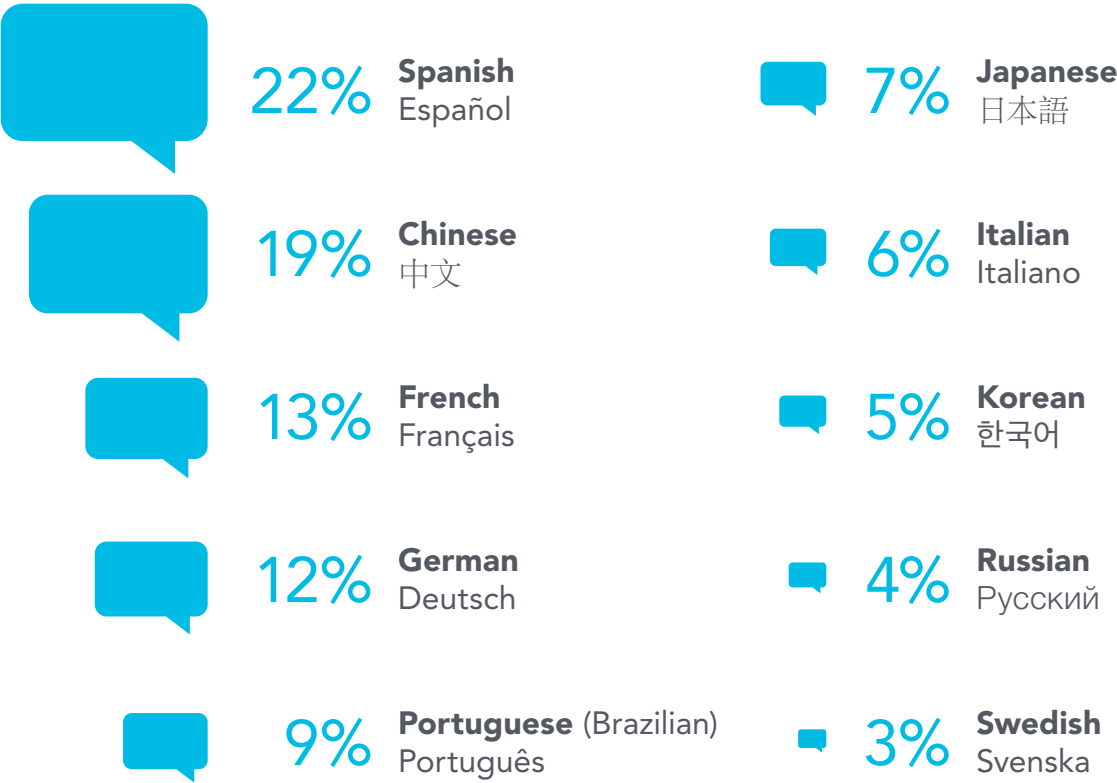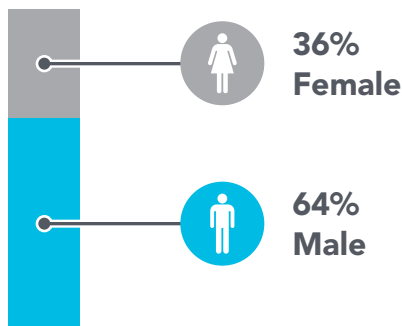
Languages

84% English

16% Other

More than one in ten browsers that connect to Wi-Fi in U.S. airports are set to a language other than English.

Top 10 Non-English Languages

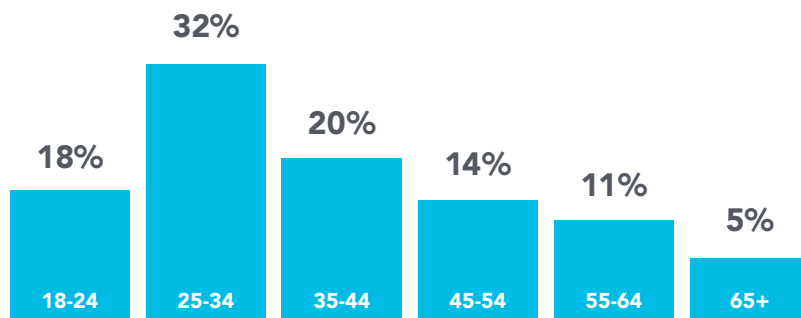22% **Spanish**
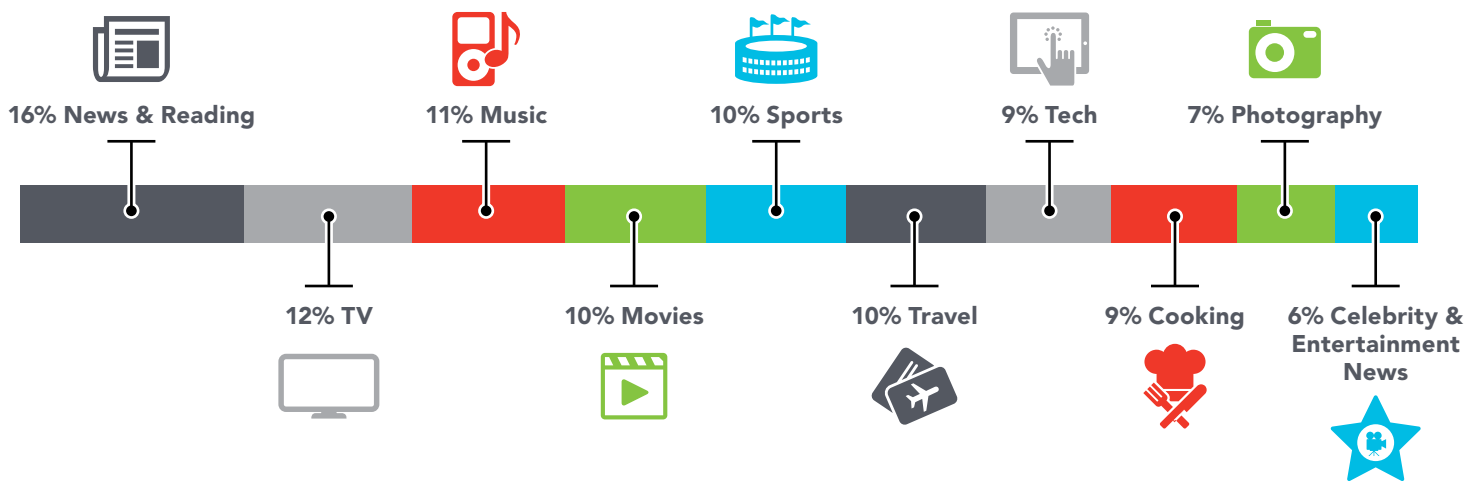Español

19% **Chinese**
中文

13% **French**
Français

12% **German**
Deutsch

9% **Portuguese** (Brazilian)
Português

7% **Japanese**
日本語

6% **Italian**
Italiano

5% **Korean**
한국어

4% **Russian**
Русский

3% **Swedish**
Svenska

Visitor Profile

36% Female

64% Male

Nearly two-thirds of airport Wi-Fi users are men.

18%	18-24
32%	25-34
20%	35-44
14%	45-54
11%	55-64
5%	65+

Half of airport Wi-Fi users are Millennials, a valuable demographic of digital natives who have largely grown up with technology and social media.

Lifestyles/Interest Categories

16% News & Reading

11% Music

10% Sports

9% Tech

7% Photography

12% TV

10% Movies

10% Travel

9% Cooking

6% Celebrity & Entertainment News

Airport Wi-Fi users have demonstrated interests across a broad range of categories, but staying informed or reading while traveling trumps all other topics of interest.

Want to learn more about airport wireless trends?

Have a burning question that only Boingo can answer? Let's talk!

Reach us by telephone or email: 310.586.5180 | newbiz@boingo.com

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