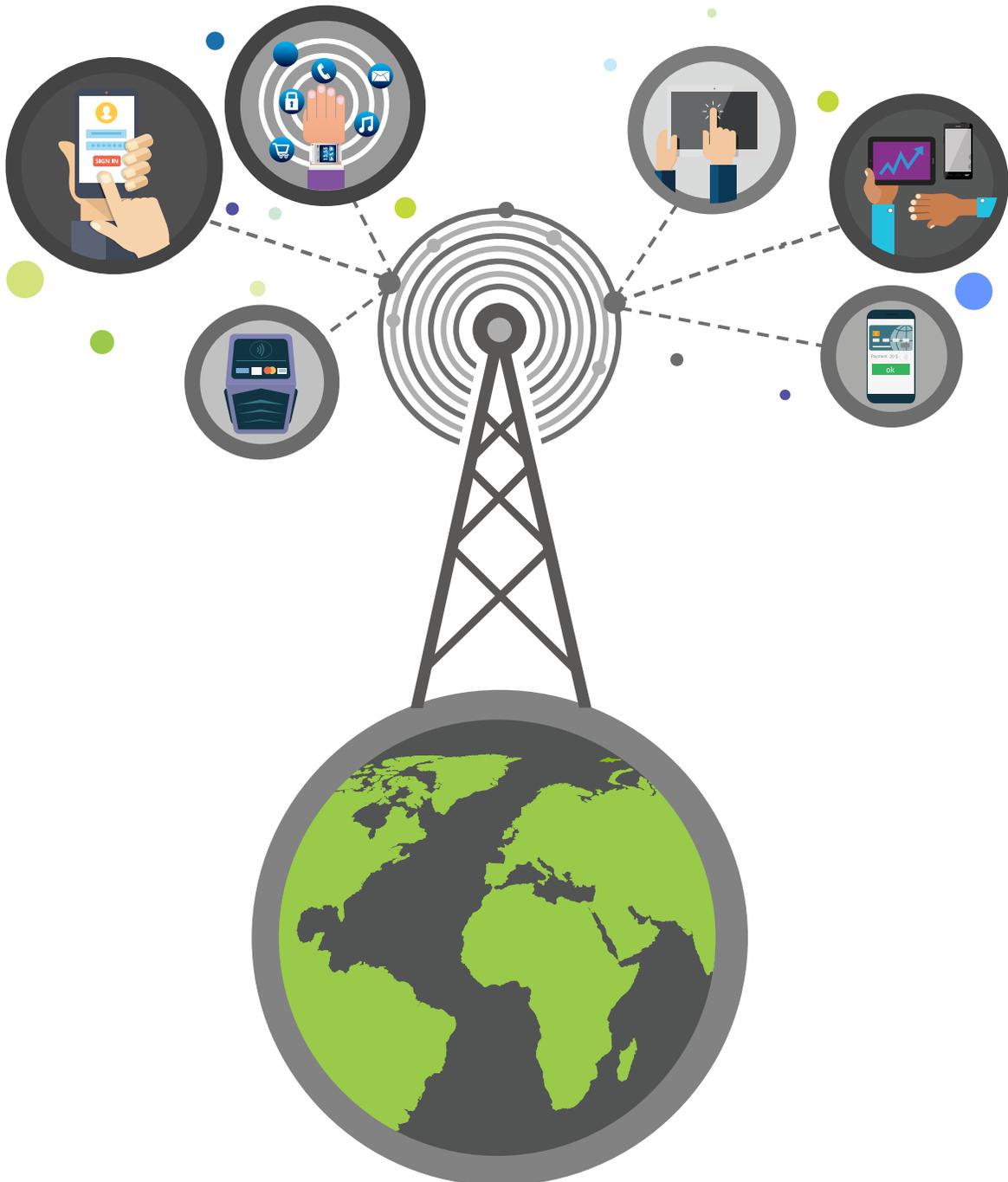


Global mobile consumer trends: 1st Edition

Mobile proves to be indispensable in an always-connected world



About the report

Getting ahead of connected consumers' fast-changing user habits is one of the keystones of Deloitte's global Technology, Media & Telecommunications (TMT) practice. As a testament to our dedication to this industry, for the past five years we have commissioned an extensive online survey that reveals the key trends are driving the global mobile markets.

Fielded by an independent research firm, the survey focuses on consumer behaviors, trends and opinions for a broad range of wireless and mobility products and services. In addition to exploring developed versus emerging market results and key insights, the survey is also designed to highlight differences in consumer usage habits between specific countries.

The report is based on our Global Mobile Consumer Survey, the biggest and most extensive to date, covering 6 continents, 31 countries, and 49,500 respondents—which represents close to 70% of the world's total population. The findings in this report are based on the analysis of this collective data.

In developed markets, samples were nationally representative and based on 2,000 or more responses. In emerging markets, the survey polled a high concentration of urban professionals. All samples included 2,000 or more individuals, except for Turkey, in which the target sample was 1,000 respondents.

Five key trends shaping the future of mobile connectivity

1 Mobility comes in all shapes and sizes

It should come as no surprise that the number of consumers who own devices continues to increase with emerging markets taking the lead. 78% of global consumers have smartphones, nearly 10% own wearables, and more than 50% have tablets. The percentage of consumers who own all three devices is 7.

Contrary to what we might think, smartwatch and fitness band ownership in emerging markets surpasses the global average. In emerging markets, 26% of consumers are planning to purchase a wearable device. Similarly, 20% are planning to purchase a tablet within the next 12 months. In developed markets wearables garner interest from 13% of the consumers and 20% of them are planning to purchase a tablet in the next 12 months.

When we analyzed the combination of device penetration and “likelihood to buy” survey categories, in developed markets, we found that Singapore leads the world in connected consumers. Poland also ranks near the top in each category with the US, Australia and Italy not far behind.

Which, if any, of the following devices do you own or have ready access to?

Developed markets

76%
Smartphone

8%
Wearables

54%
Tablet

6%
Own all 3

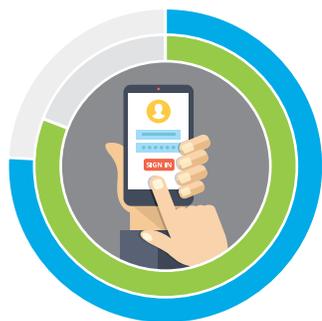
Emerging markets

81%
Smartphone

11%
Wearables

53%
Tablet

8%
Own all 3



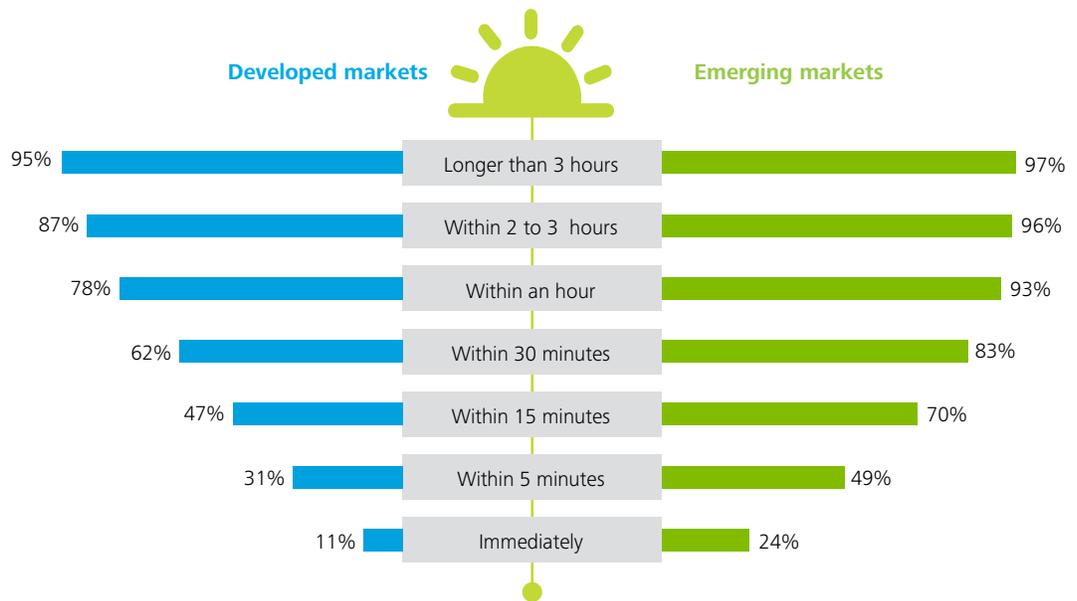
2 Consumers can't get enough mobile screen time

Globally, we all have something in common—almost all mobile consumers check their phones within three hours of waking up. 93% of the consumers in emerging markets look at their phone within an hour or less of waking up. For developed markets, this number is 78%. The trend is especially pronounced in Asia-Pacific as countries there hold three of the four top slots across both developed and emerging markets for the number of consumers who check their phone within an hour or less of waking up.

In terms of the number of times consumers check their phones, the global average is around 40 times per day. When we look at developed markets, we see that an average of 6% of people check their phones at least 100 times a day. For emerging markets, that number is 14%.

Singapore consistently ranks as one of the most connected mobile consumer markets, and here again topping the list with more than one in 10 of its citizens checking their phones more than 100 times a day.

Typically, how long is the interval between you waking up and looking at your phone for the first time?



3 Text and instant message are consumer favorites

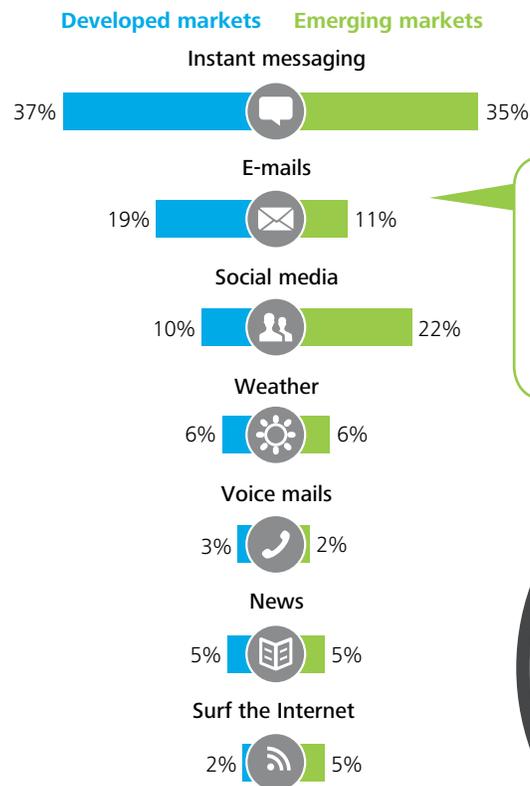
Now that we know we are all checking our devices within three hours of waking, what exactly are we checking? Across all of the countries, consumers are most commonly checking text messages and instant messages (IM) first thing every day. In developed markets, email follows this trend with 19% of consumers checking email. In emerging markets, social media is the contender with 22% of consumers checking it first thing in the morning.

Despite the consistent focus on data services, traditional voice service remains the most commonly used application across the developed world. 76% of consumers in developed markets indicated that they used the voice service in the last week. Text messages follow closely behind with 74% of consumers frequently using this feature. When we look at emerging markets, the trend is similar. 70% of consumers in emerging markets use voice calls the most to communicate with others, 68% use IM frequently, 67% text, and 64% are frequent social network users.

Consumers in emerging markets are finding more ways to engrain mobile phones in their daily lives compared to their counterparts in developed markets. In fact, 95% of consumers in emerging markets use their devices while at work and 93% use them while shopping and spending leisure time with friends and family.

Consumers in developed markets are also never far from their devices, but the amount they use them is a little less. In emerging markets, 95% of consumers use their mobile phones while at work, 93% while shopping and 91% while watching TV. For developed markets, 89% of consumers use their mobile phones while at work, 86% while shopping and 80% while watching TV.

Typically, what is the first thing you access on your phone every day?



Consumers in the emerging markets prefer social media as the first thing to access more than 2X compared to developed markets

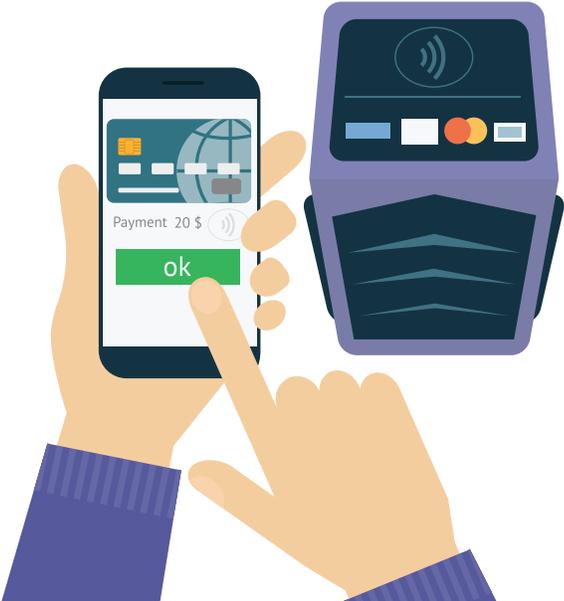


4 mPayment usage is picking up speed

Still a relatively new application, mPayment usage is gaining traction globally. 47% of the consumers in emerging markets reported using their phones to make in-store payments. In developed markets, 20% of the consumers reported using their phones to make in-store payments and 30% indicated interest.

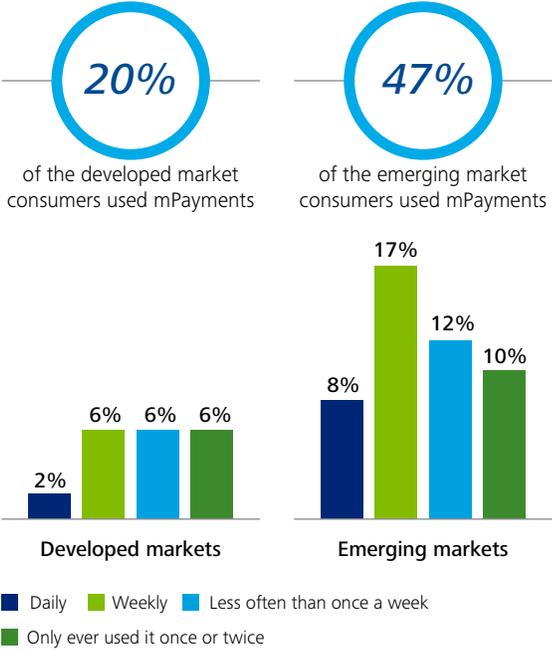
As an example, China, which has predominantly been a cash market, over the past year has been one of the fastest countries to adopt mobile payments for instore purchases with a 66% increase over last year. It is certainly interesting that consumers in technologically advanced countries like Germany, France, and US are far more reluctant to use mobile payment solutions. Despite the perception that mPayments hasn't had widespread success in the US market, there is still significant use in select categories.

When we look at where consumers are making mPayments, we saw that in developed markets public transport leads the list. In emerging markets, consumers are using mPayments while shopping, at restaurants and in taxis. In developed markets, more northern Europeans use mPayments for transport whereas central and southern Europe uses them more on food / shopping (lifestyle).



However, despite differences in likelihood to use mobile payment services, one thing that's unambiguous is the number one reason consumers would not want to use mPayments. Globally, approximately 40% of the consumers are concerned that mobile payments are not secure enough, pointing to the need for consumer education, considering that these systems are as secure, if not more, compared to the traditional payment methods.

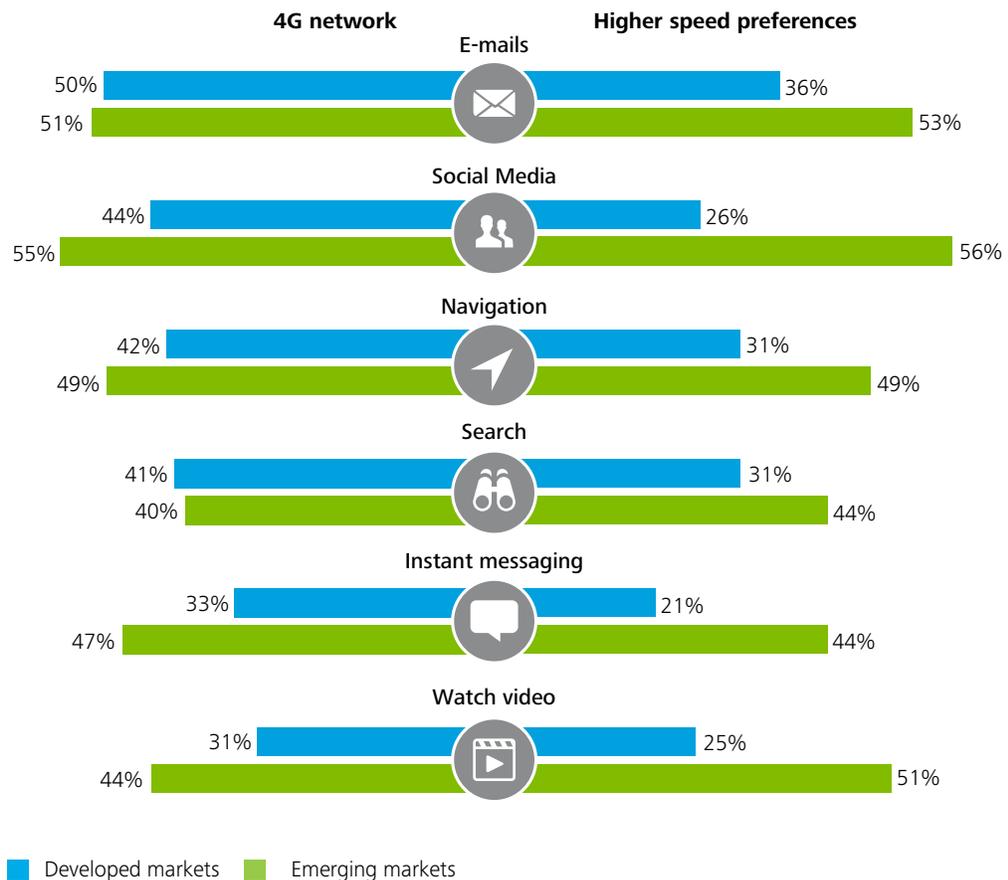
How frequently, if at all, do you use your phone to do at least one of these things? (make in-store payments)



5 Network versus Wi-Fi—a regional preference

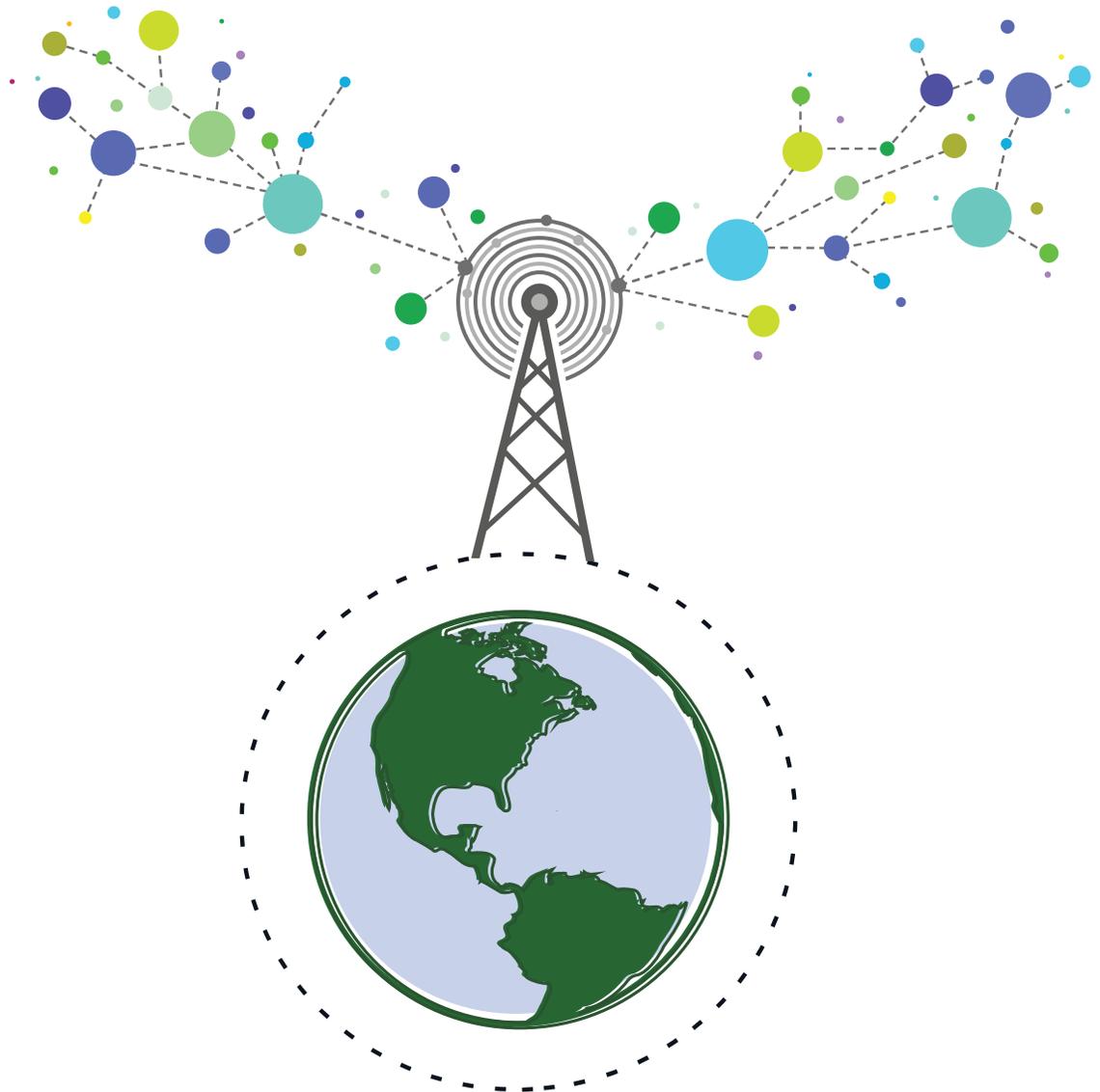
Bringing it altogether, how are consumers making calls and using applications; is it network or Wi-Fi? In developed markets, 4G speeds are consistently higher than Wi-Fi speeds. Users in China consider 4G speed to be faster while commuting and in malls, whereas in Mexico users feel otherwise. Moreover, users in Brazil consider Wi-Fi to be faster in all places.

In the Americas region, Wi-Fi is the preferred method to connect to the internet, while Europe and Asia-Pac prefer mobile (e.g., 4G). On the whole, though 4G provides substantially faster speeds, the activities / applications people use most don't require high-bandwidth services (e.g., email, search). When asked about application preferences on a higher speed network, emerging markets provided similar results, but consumers in developed markets skewed towards activities that don't particularly require high speed.



Increased connectivity for everyone

When we consider the five key trends listed in this report, the high level theme is apparent. Between the rising device penetration numbers, increased mobile phone usage during daily activities, and new areas of mobile integration such as mPayments, it is evident that the connected-consumer is here to stay. The question will ultimately be how the experiences will continue to be shaped and created.



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