



**Global Digital Consumer Survey**  
China Edition





# Contents

Summary	4
Device usage	6
VR	12
Smartphone Purchase	15
Smartphone use	20
Subscription	22
Game	28
Cyber threat	32
Crypto-currency	37
Connection	41
Communication and socialization	46
Contacts	50

# Summary

1



## 90% of people use their smartphone everyday with a high dependence

Chinese consumers frequently use their phone for a plethora of digital activities. Young people, in particular, use their phone everyday. In addition, wearable gadgets such as smartwatches are also favored by consumers due to their technological features and portability.

2



## Focus on health and use smart devices to monitor health indicators

The high adoption rate of smartwatches and fitness bands has led more consumers to use smart devices to monitor their health indicators, especially steps, heartbeat and sleep. Most people are also in favor of doctors accessing their health data to improve the efficiency of medical consultations.

3



## Focus on environmental protection and become aware of carbon footprint

Most people are concerned about the carbon footprint issue and trust the authenticity of carbon footprint information. They can tell the carbon footprint of their phone and would be inclined to buy more environmentally friendly devices.

4



## Lack of understanding and high prices have led to low VR adoption

Many people are not familiar with VR headsets, coupled with high prices, resulting in a weak willingness to purchase. Even if they already have one, as the digital content is limited, male consumers have been tired of existing content. Female consumers do not use it frequently due to physical discomfort.

5



## New smartphones are being launched frequently, often at intervals shorter than two years

With the development of technology and the improvement of innovation capabilities, the introduction of new smartphones always attract consumers' attention. Most respondents purchased a new phone in the past two years and are very concerned about whether hardware configuration such as processors, battery capacity, and storage space can meet their expectations.

6



## People dispose of their old phone through a range of ways, and many will keep their old phone for backup use

Considering personal data and critical files in old phones, people are reluctant to sell or give their old phone to others. Some people also believe that with a new phone, the old one will still come in handy in case of phone damage or loss.

7



### A wide varieties of online activities to meet people's social-networking and entertainment needs

Smartphones have long been the most important means for people to communicate, entertain, and learn. Breaking the limitations of time and space, smartphones not only make our lives more convenient, but also provide diversified recreational and cultural activities.

8



### Paid subscription services become an important part of entertainment consumption

Many consumers are choosing video, music and sports subscription services, led by iQIYI and Tencent Video, which not only provide them with access to a wider variety of digital content, but also an ad-free, ultra-high-definition viewing experience. People will consider both digital content and economic factors to choose whether to renew a paid service.

9



### Focus on cybersecurity and stay alert to potential threats

The government, regulators, and relevant online platforms need to assume their responsibility for maintaining cybersecurity. Meanwhile, most users indicated that they are aware of potential risks and will avoid using certain devices and services due to privacy issues. They will also take care to give app permissions and block certain advertisements.

10



### People don't know much about crypto-currencies and don't have a strong willingness to buy

As a product of the metaverse, the concepts of crypto-currencies and non-fungible tokens are not well understood for the moment. This results in low currency holdings and a weak purchase willingness. However, there is no denying that emerging currencies will have a transformative effect on future economic and financial systems. People are also aware of the negative impact of crypto-currency mining on energy and the environment.

11



### 5G is gaining acceptance with moderate adoption

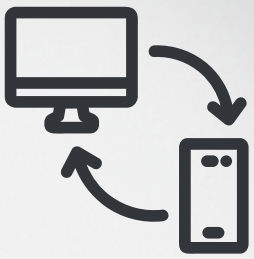
People has recognized 5G for its high transmission speed and low latency. Users acknowledge that 5G is an inevitable trend for the future. A considerable number of respondents regularly use 5G, but people's understanding of the technology needs to be improved. Network coverage and connection stability still limit the further application and wider adoption of 5G, which needs to be solved.

12



### Face-to-face communication and audio/video calls are preferred methods of socialization

People still choose to meet a first date, a colleague or a friend face-to-face, which can create a sense of closeness. However, audio/video calls which were widely used during the pandemic are here to stay as an important way to communicate with colleagues and connect with family and relatives who are far away, effectively breaking the distance.



## Device usage

89% of respondents reported daily use of smartphones, and the utilization rate varied significantly by device type

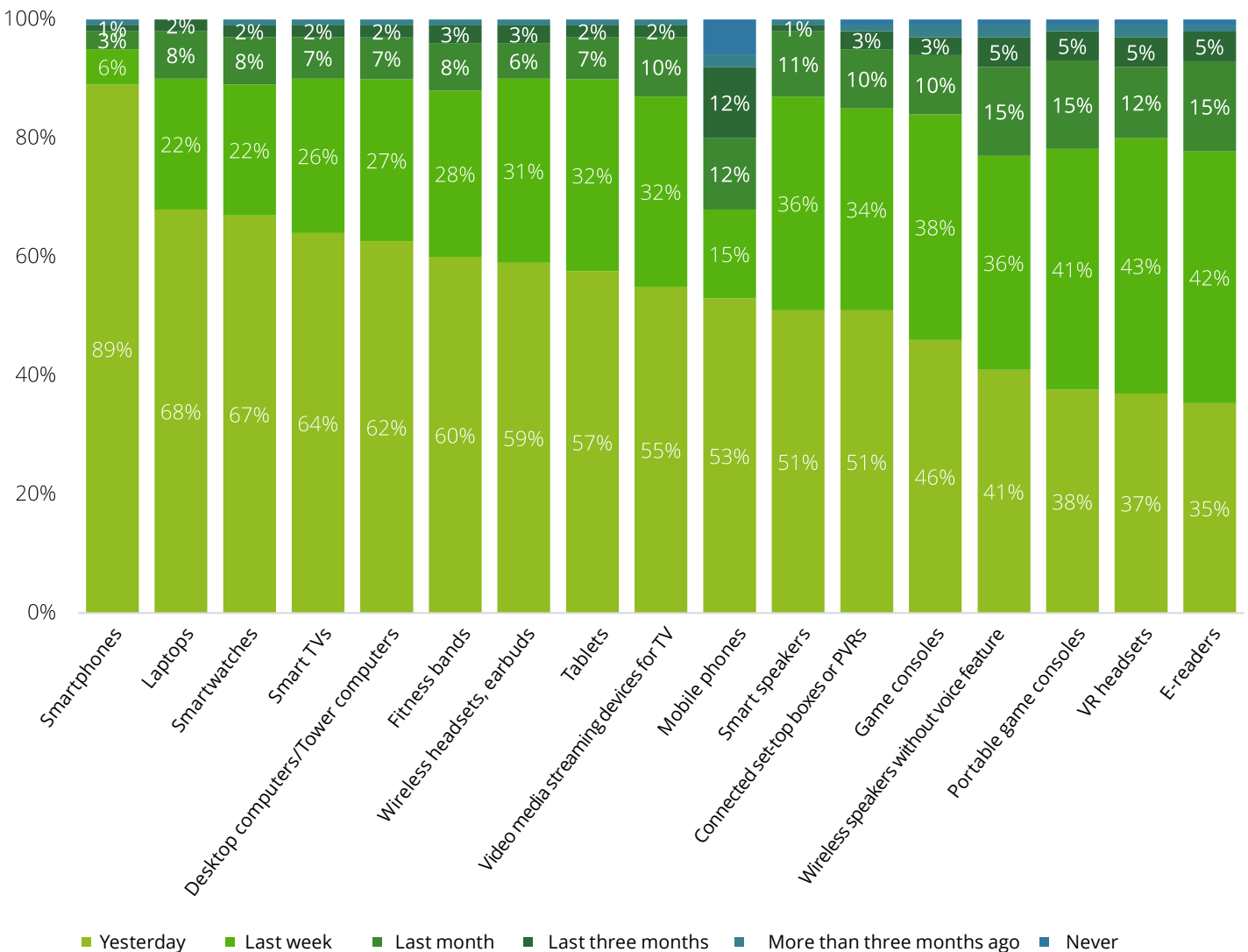


**When was the last time you used each device?**

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 1: Last time of using each device**



- Among all mobile devices, smartphones and personal computers (PC) are used most frequently by Chinese consumers (especially young people). Hardly anyone can do without them.
- In terms of use frequency, smartwatches are second only to laptops. The versatile wearables can be connected to phones and PCs. People use them everyday due to its portability.

A majority of consumers use smartphone everyday, with the youth age group using it more frequently than the middle age group

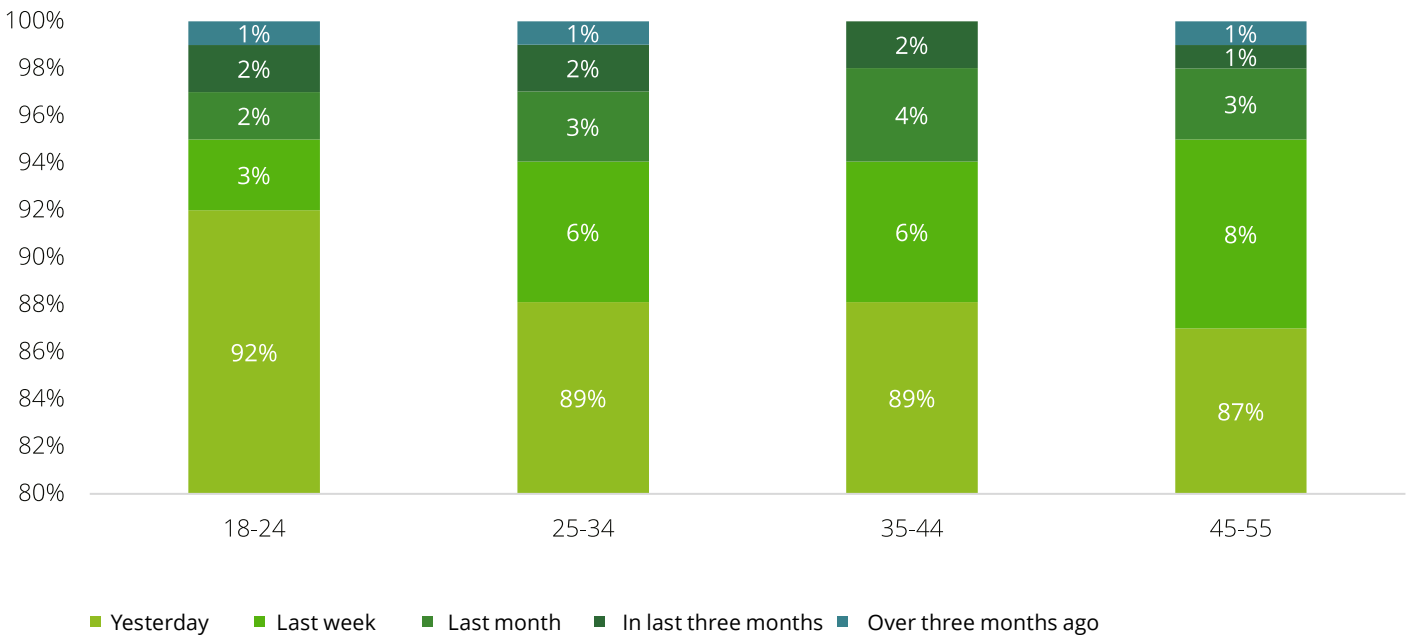


**When was the last time you used each device?**

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 2: Last time of using smartphone**



- Smartphones prove to be the most popular electronic device with the highest use frequency. Specifically, the youth age group use it more frequently than the middle age group; more than 90% of those aged 18-24 use it everyday; still, 89% of those aged 25-44 reported daily use.
- While 87% of those aged 45-55 reported last use being yesterday, slightly lower than the three younger demographic groups, the ratio indicates a high degree of acceptance and utilization.
- People use smartphones to communicate and connect with each other. The wide use in young people drives parents and grandparents to use it more often to catch up with their children and grandchildren. With the development of the mobile internet and smart devices, we expect the popularity and use to further increase.



The youth age group are more used to monitoring health by smart devices with more than 60% of them tracking steps and heartbeats

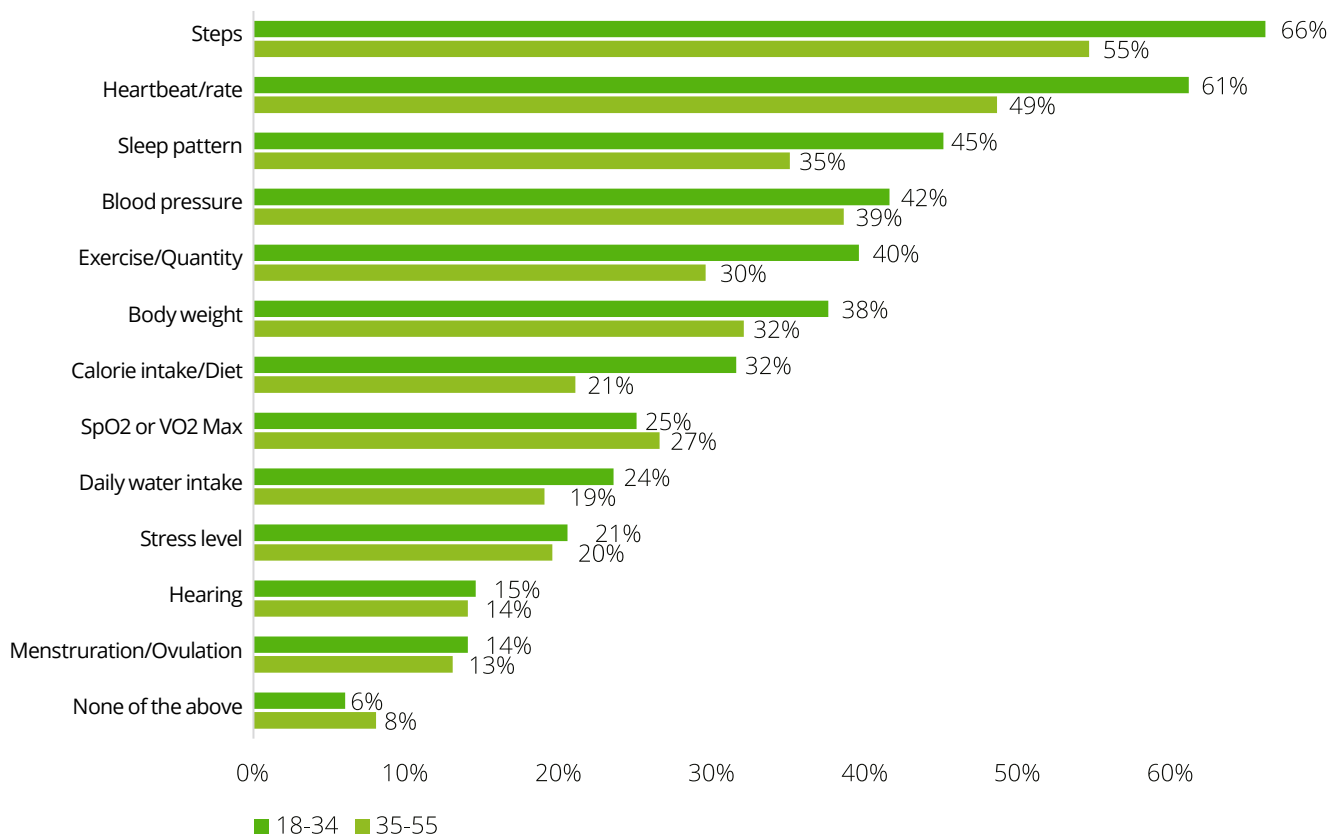


**Which health data (if any) are monitored by your smartphones, smartwatches, fitness bands, or other devices?**

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 3: Monitoring health data with electronics**



- Use of smart devices for monitoring health can increase people’s attention for their fitness status. According the survey, young people tend to use smart devices more for monitoring health data.
- Steps and heartbeat/rate are the two most tracked indicators. More than 60% of respondents aged 18-34 record the two; while for the middle age group the figure is around 50%, significantly higher than those of sleep pattern and blood pressure.
- With a high adoption of smartwatches and fitness bands, young people are more capable of exploring and using health monitoring features, which helps them pay more attention to their wellness. Those aged 35 or above are more used to adopting traditional means for health check, less adept in using smart devices than younger respondents.

Most respondents voiced support for doctors accessing their health data; with more from the middle age group approving the practice

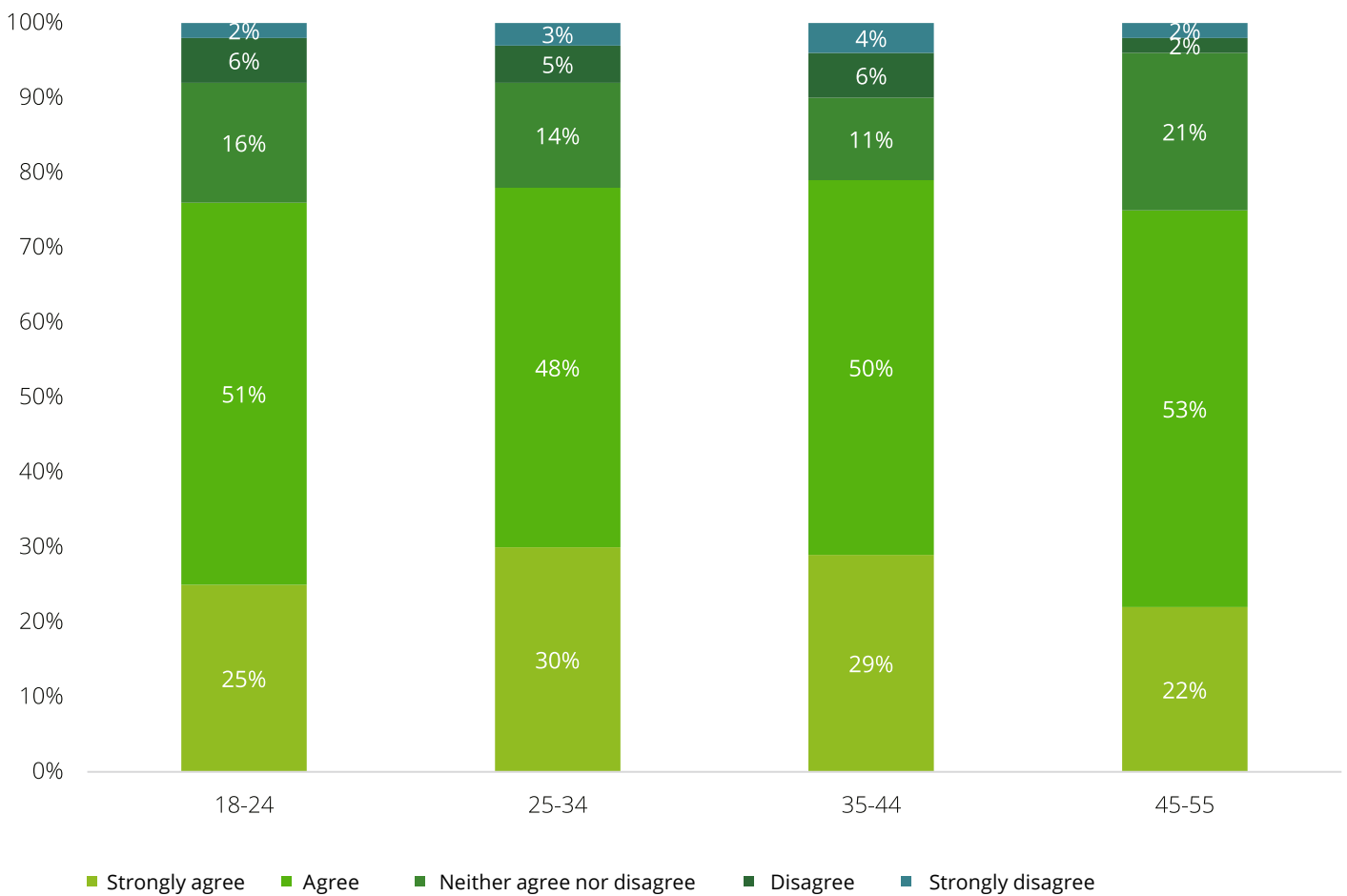


To what extent do you agree or disagree with the following statement? I am comfortable with doctors accessing my devices for health data (e.g., calorie, heartbeat, sleep data)

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

Figure 4: Attitude toward doctors accessing my devices for health data



- As health monitoring can improve the efficiency of medical consultations, around 70% of respondents are for the idea of doctors accessing their smart device for health data, just less than 10% are against it.
- Those aged 25-44 has a higher approval rate, which might indicate that the middle aged are more likely to visit a doctor for health issues. The younger age groups value personal privacy more; those aged above 44 are more conservative and their acceptance toward technological advancements needs to improve, as a result more of this age group are neutral to or against the practice.

## Environmental protection: Nearly 70% of consumers are aware of carbon footprint, and their environmental protection awareness will keep growing

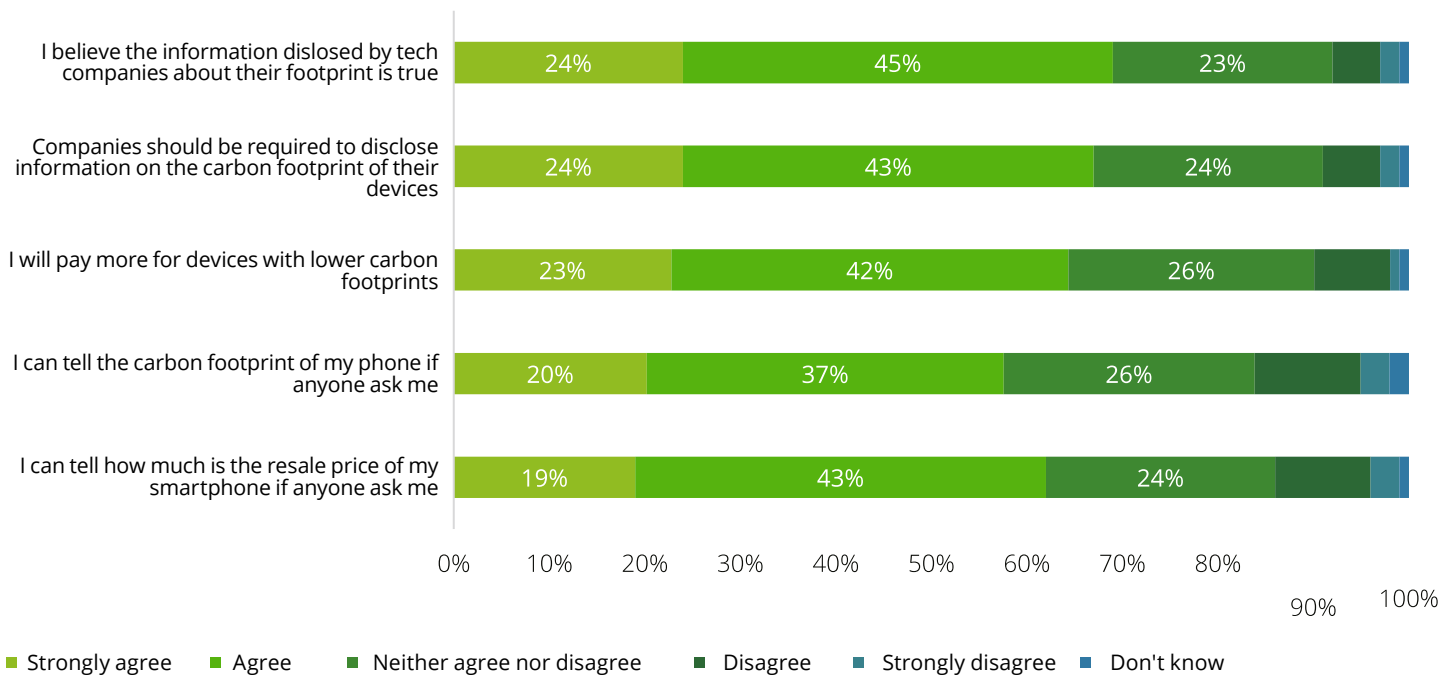


To what extent do you agree or disagree with the following statements?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

Figure 5: Attitude toward carbon footprint



- The survey shows, close to 70% of respondents are concerned about carbon footprint related issues, who believe and expect relevant companies should accurately disclose the information related to carbon footprint. Around 60% of respondents not only consider buying low-carbon products, but also are aware of the carbon footprint of their devices.
- More and more entities are now becoming interested in low-carbon manufacturing. Given the government publicity and the voice of the public, mobile device manufacturers will shoulder more social responsibility in producing more low-carbon products; consumers' increasing awareness on environmental protection will lead to a further rise of low-carbon footprint device purchase and adoption.



## A lack of understanding of the technology and high prices are two barriers for people to buy VR headsets

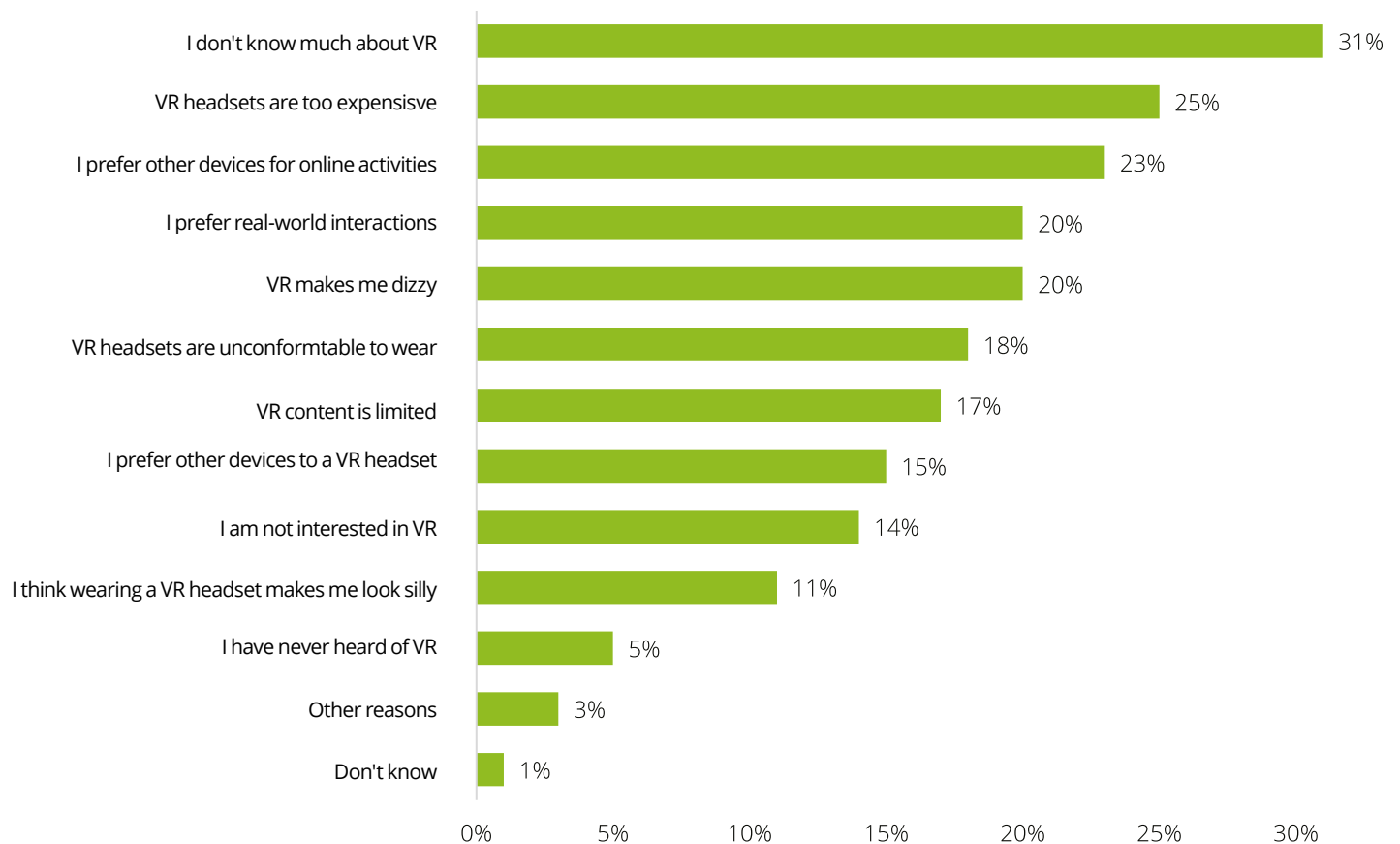


### Which of the following best describes your reason for not owning a Virtual Reality (VR) device?

Base: All adults 18-55 who do not have access to a virtual reality headset (1873)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 6: Reasons for not owning a VR headset**



- The VR technology is still in its early stages, with low device adoption. There are two important reasons behind respondents' reluctance to buy. On the one hand, people need more time to improve their understanding of novel devices. On the other hand, VR headsets are more expensive than most traditional devices like phones and laptops.
- Respondents also mentioned another two reasons. First, when people watch VR content, the discrepancy between what the eyes see and what the body feels causes dizziness; Second, due to the build, VR headsets often lead to discomfort of wearers.

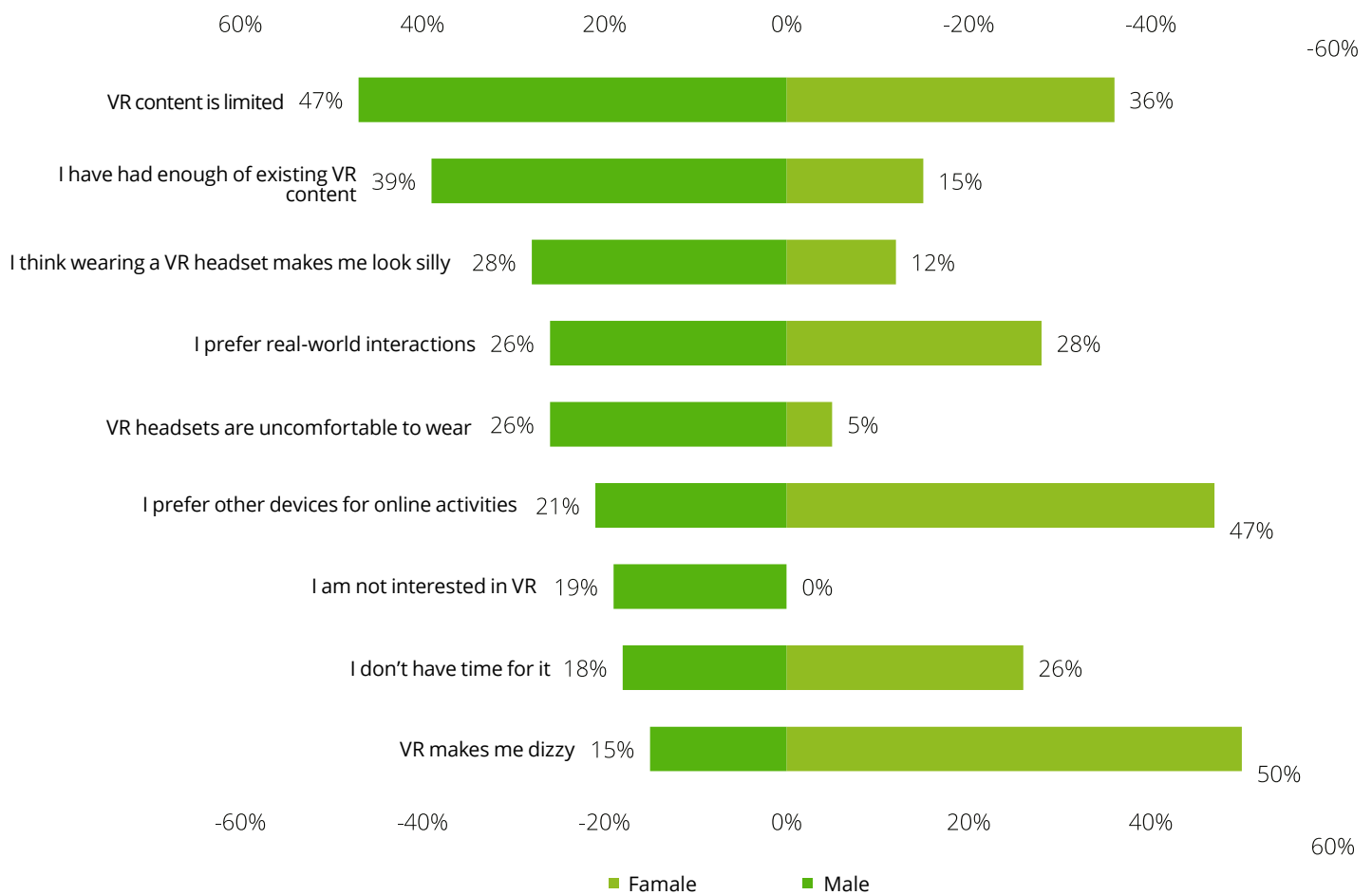
## Among VR headset owners, male users tend to complain more about the content, and female users are more likely to report physical discomfort



### Which of the following best describes your reason for not using a VR headset in the last month?

Base: All adults 18-55 who have access to a virtual reality headset but did not use it in the last month (27)  
 Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

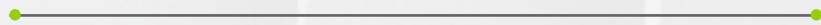
**Figure 7: Reasons for not using a VR headset in the last month**



- While the adoption of VR headsets increases, development of appealing and novel VR content fails to catch up, therefore consumers' needs for using VR are not satisfied. People hope to see more VR content with rich variety.
- Among owners who reported not using VR headsets in the last month, 47% of male users say VR content is limited, and 39% indicate they have had enough of existing content.
- Compared to male owners, 50% of female owners say they use VR less frequently because it induces dizziness, and 46% prefer other devices for online activities.
- More prone to the dizziness caused by the discrepancy between what the eyes see and what the body feels, female users more frequently suffer the physical discomfort brought by VR headsets, so they tend to use other devices for entertainment.



# Smartphone Purchase



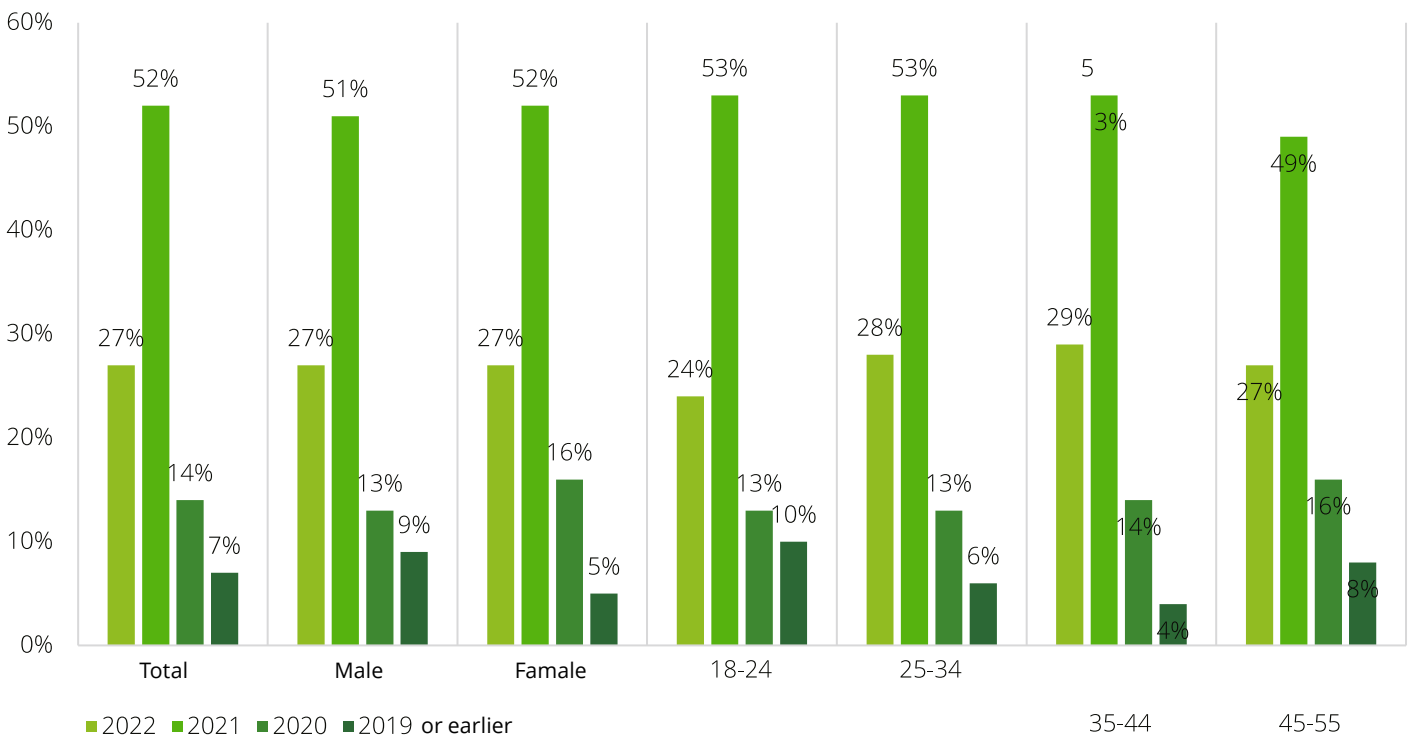
Around 80% of respondents reported their phone has been in use for less than 2 years; those aged 25-44 change their phone more frequently



**When did you purchase or receive your current phone?**

Base: All adults 18-55 who have a phone or smartphone  
 Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 8: Time of buying the current phone**



- Around 80% of respondents bought a new phone in last two years, with just less than 10% saying their phones were purchased in 2019 or earlier. As technological innovation leads to the creation of more new models of smartphones, people flock to shop the latest offerings.
- Among those aged 25-45, close to 30% bought their phone in 2022, higher than other age groups. As new devices come with better hardware and more advanced operating system or more distinctive appearance, they are attractive to those young and middle-aged adults.



## Hardware including processor and battery is a key consideration for phone purchase

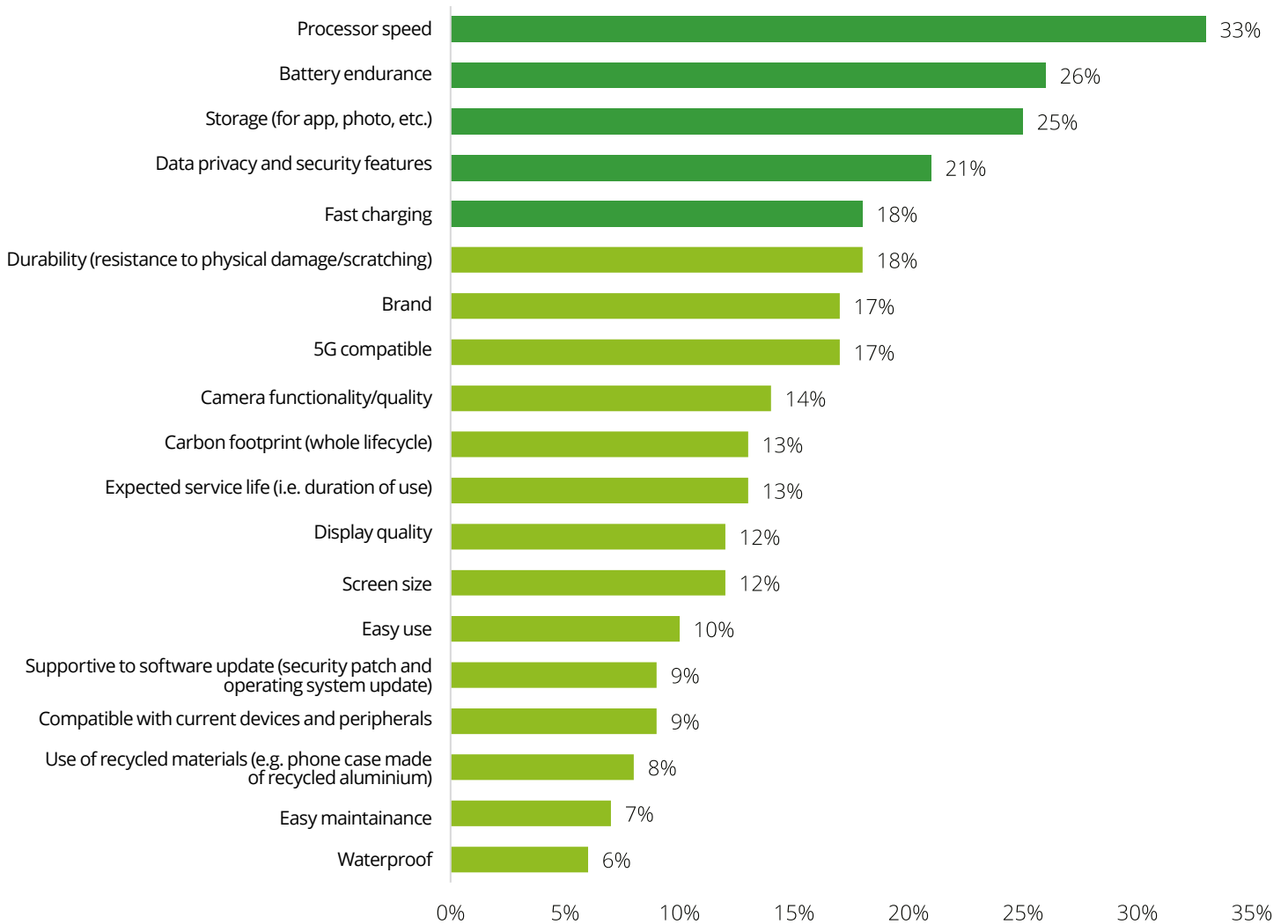


**Q. Price aside, which of the following (if any) is more important to your decision of purchasing a smartphone in the future?**

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 9: Considerations of buying a phone**



- Apart from price, people are more focused on a phone’s hardware: is the processor fast (33%), does its battery last long and charge fast (26%, 18%)? While wanting phones running faster, people also hope they can last longer.
- Note that, as cybersecurity and privacy have been stepping into the limelight over recent years, people become more concerned about an electronic device’s ability to protect their data and personal privacy: 22% of consumers claimed they will consider this factor.

## Young people tend to keep their old phone for backup use mainly because it carries their personal data

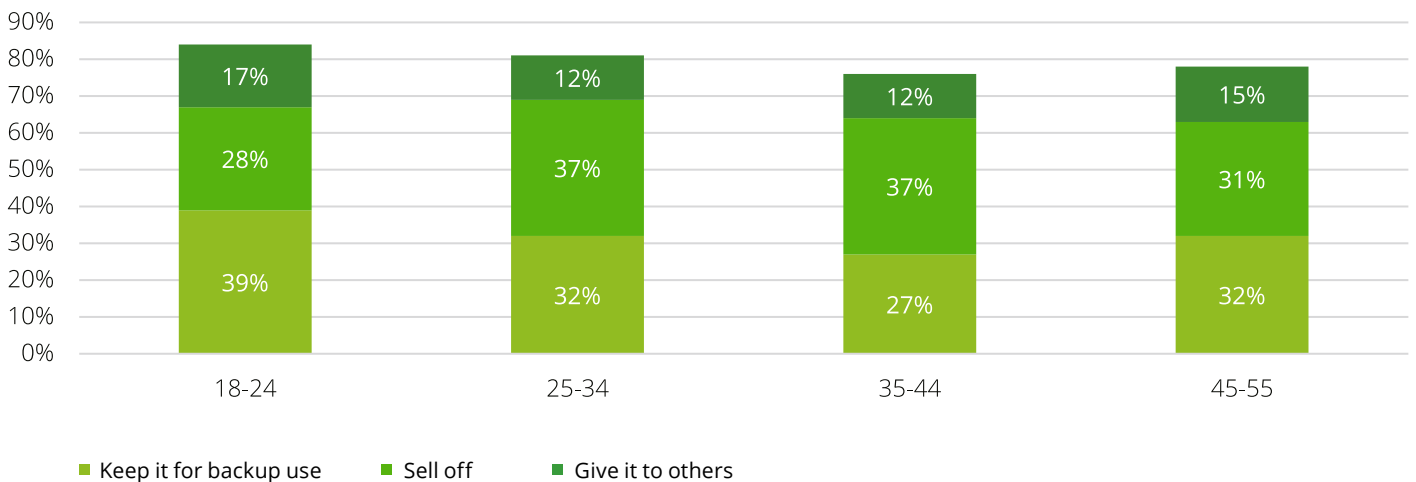


**Q. What did you do with your old phone after bought or received the current one?  
Why do you keep your old phone for backup use?**

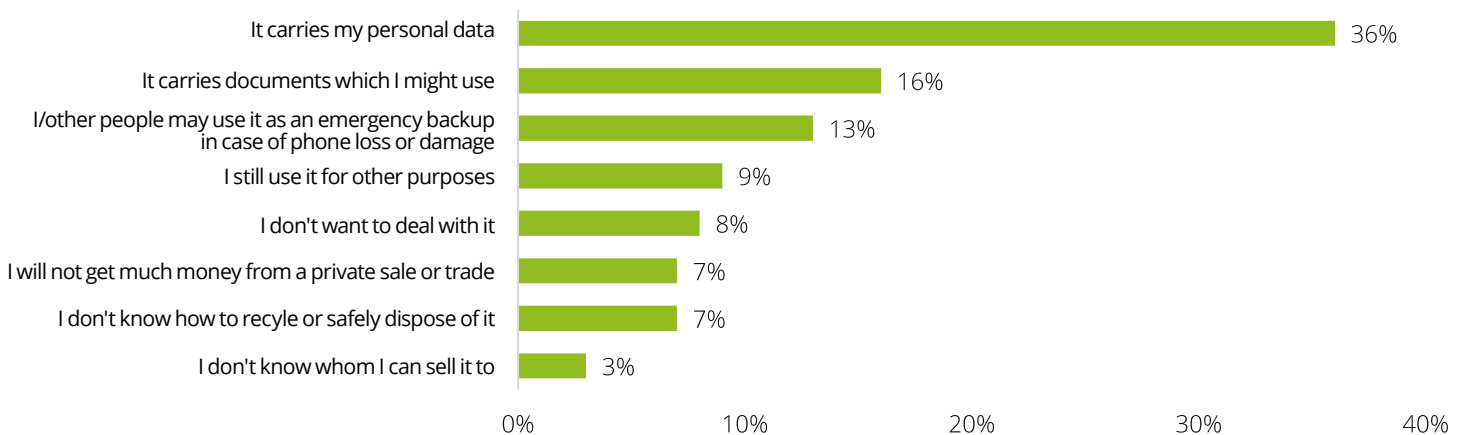
Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 10: How do you dispose of your old phone**



**Figure 11: Reasons for keeping the old phone for backup use**



- Respondents aged 18-24 tend to keep their old for backup use after buying a new one, while those aged 25 or above prefer to sell their old phone, with nearly 40% of them selling old phones through various channels.
- Transporting data and documents from old to new phones can be complicated, which is the most important reason that consumers choose to keep their old phone. Meanwhile, 13% say old phones are kept for an emergency use. With a new phone, the old one can continue to store data and documents.

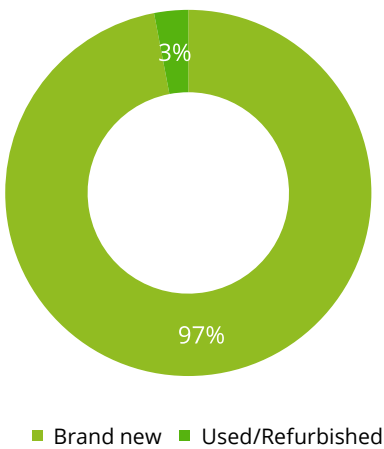
A vast majority of people choose to buy a new phone if they need to replace the old one, as a new device better serves their replacement needs



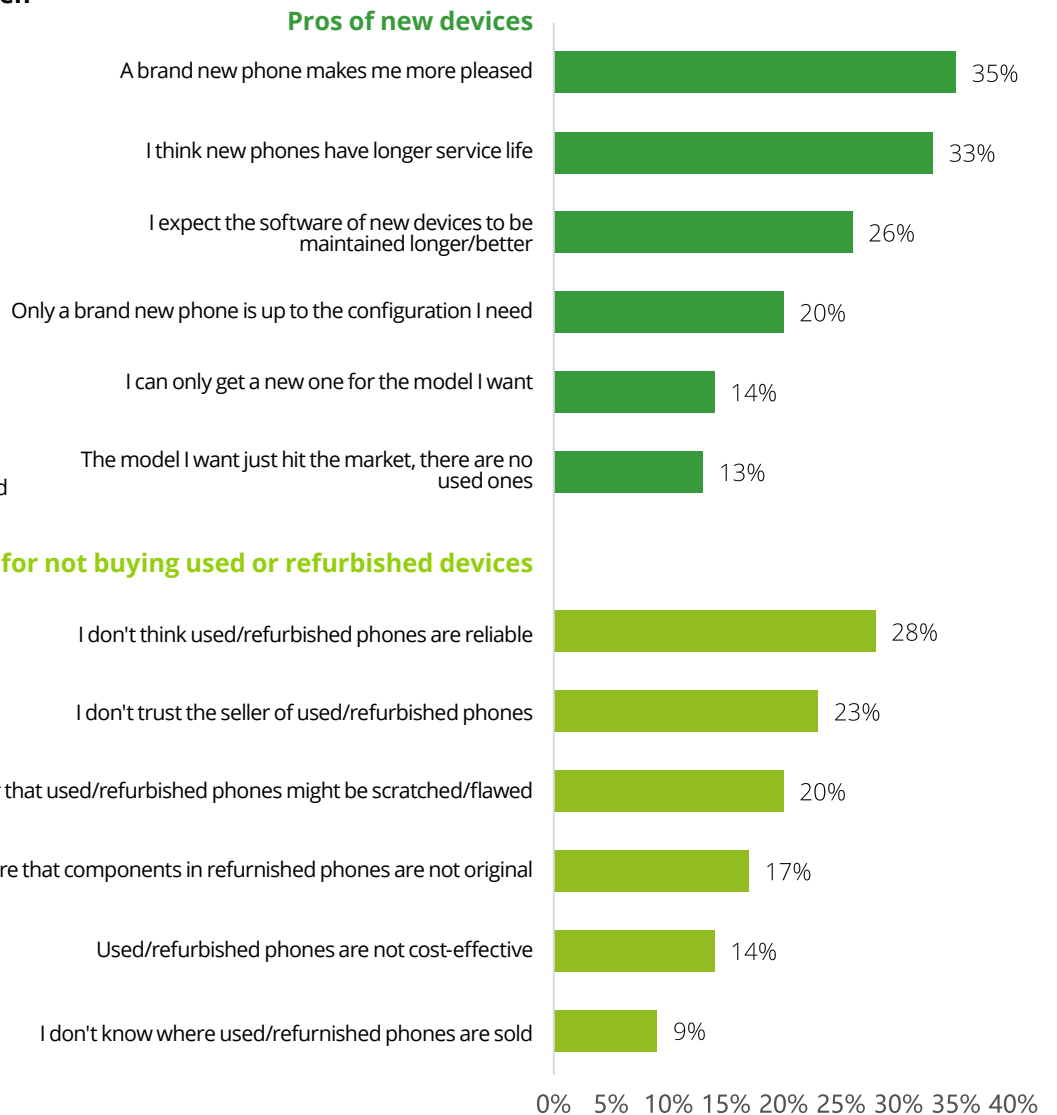
**Was your current phone new or used when you bought it?**

Base: All adults 18-55 who bought/received a new phone (2021)  
 Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 12: Was your current phone a brand new model when you bought it**



**Figure 13: Reasons for buying a new device**



- Instead of purchasing used/refurbished ones, 97% of consumers choose to buy a new one if they need to replace the old phone.
- On the one hand, a brand new phone can satisfy the buyer psychologically and practically with longer service life and all the new features; on the other hand, consumers often doubt about used phones' source and hardware quality.



# Smartphone use

Most respondents use their phones for a wide range of entertainment and to socialize online

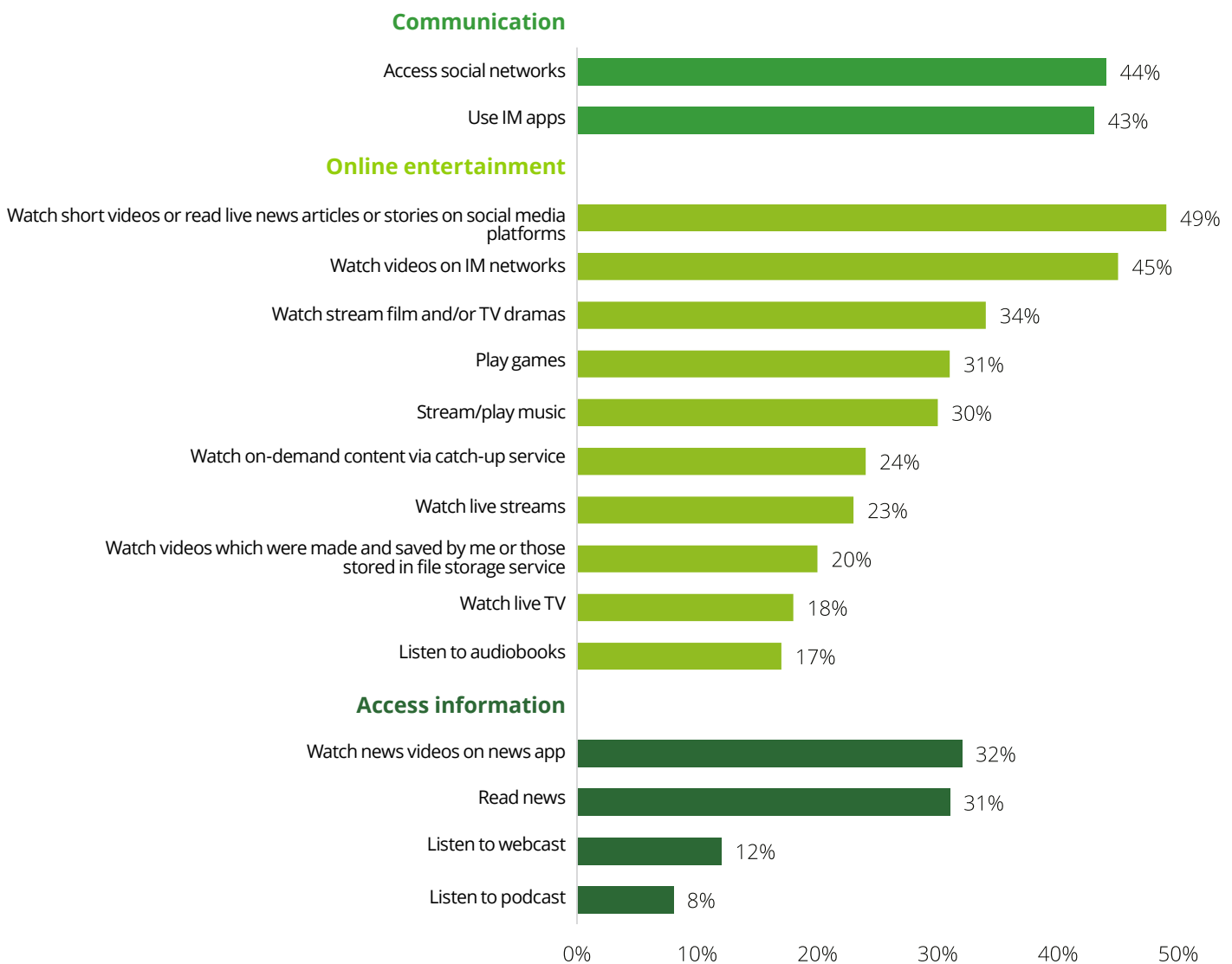


Below is a list of activities you can do with your smartphone. Which of these activities (if any) do you do at least once a day?

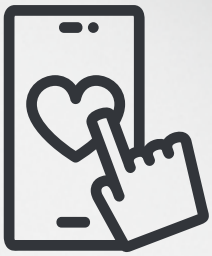
Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

Figure 14: Activities one can do with a smartphone



- People turn to their smartphones for a plethora of entertainment activities. Half of respondents entertain by watching short videos or reading live news articles everyday. Phones also play an indispensable role in enabling online social-networking and quick access to information.
- It is evident that with the growing ownership, smartphones have become indispensable in people's entertainment, communication, and life. They not only make our life easier, but also offer a rich variety of entertainment and cultural enjoyment.



# Subscription

Most consumers tend not to share an account with others; but female consumers have a slightly higher willingness to share

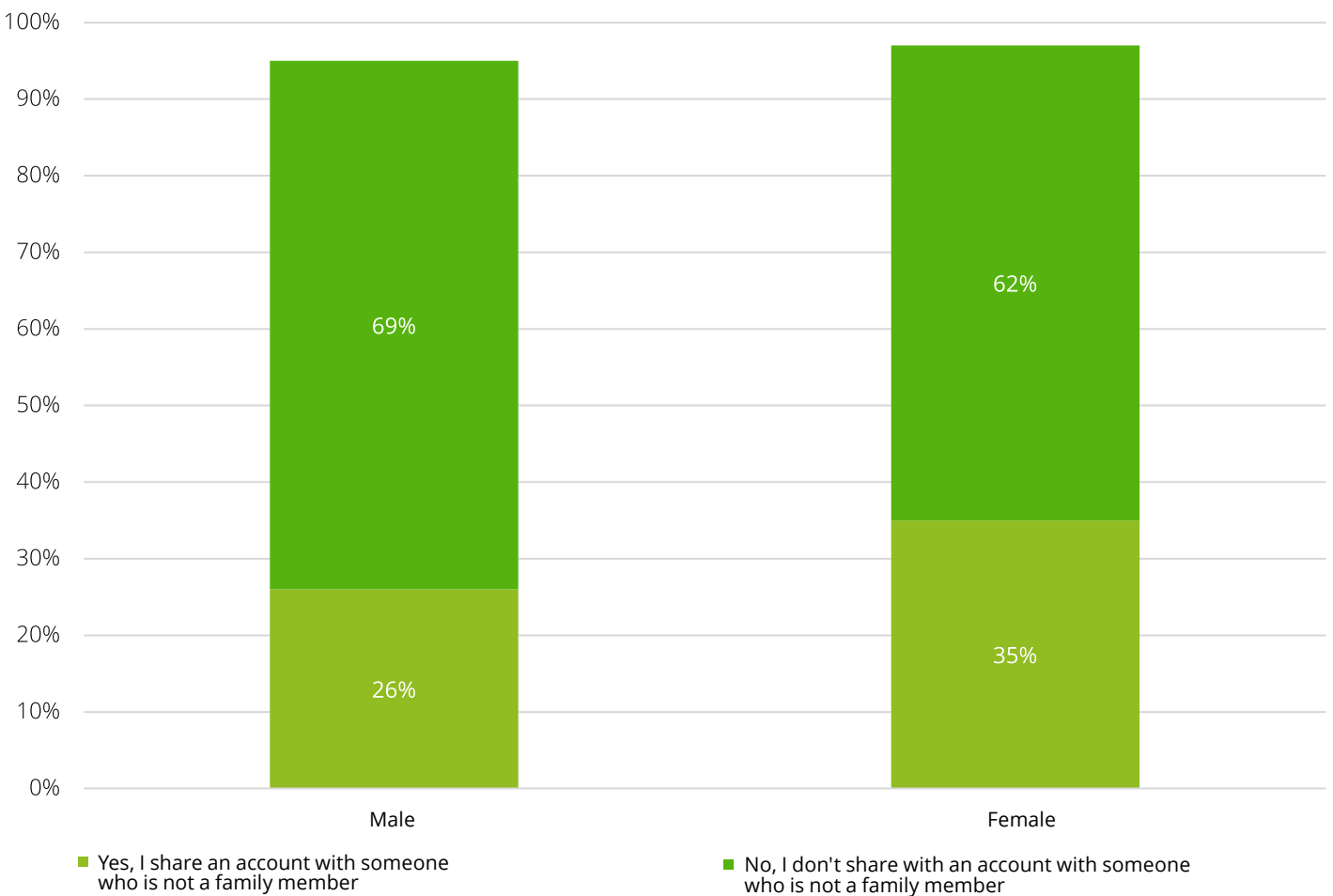


Please consider paid services or subscriptions that you have access to, do you share an account with someone who is not a family member?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

Figure 15: Do you share a subscription account with others



- 35% of female consumers choose to share a subscription account with someone who is not a family member, 9 percentage points higher than male consumers.
- As female consumers generally watch online videos and use subscription services less frequently than male consumers, sharing paid services with others may save resources and reduce costs while affording the same entertainment services when necessary.

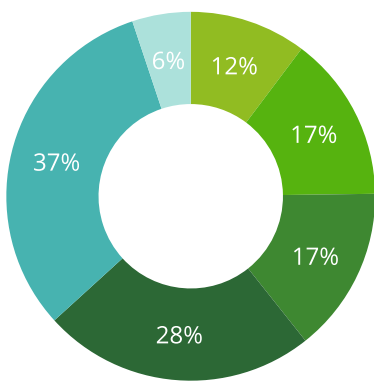
Nearly 30% of respondents have cancelled their subscription before, mainly for lack of appealing content or higher-than-expected fees



Have you or your family subscribed to or cancelled any paid streaming service (like iQIYI and Tencent Video) in the last 12 months?

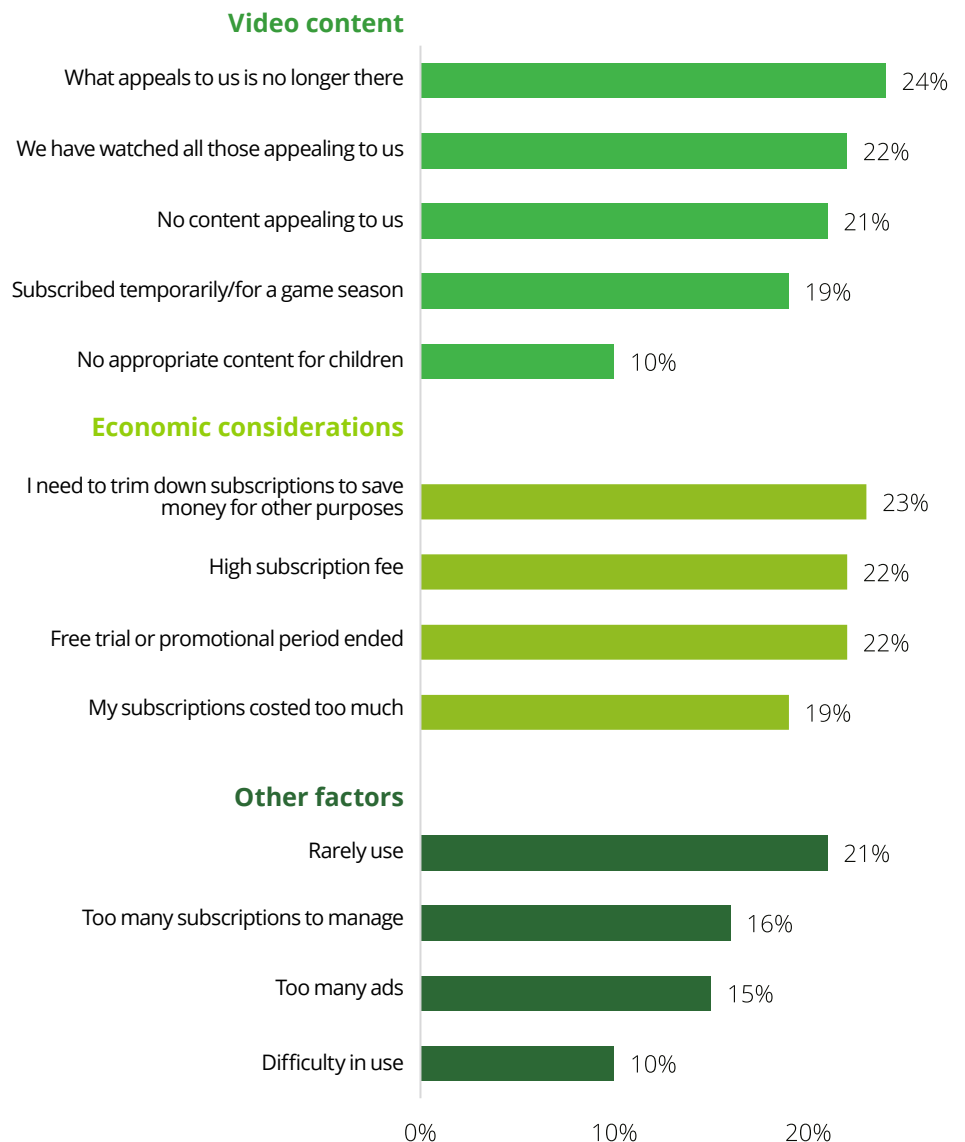
Base: All adults 18-55 who have cancelled a video streaming subscription service in the last 12 months  
Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 16: Family subscription behaviors**



- Cancelled with no plan for resubscribing
- Resubscribed
- Cancelled with plan for resubscribing
- Have not subscribed to or cancelled any service
- Subscribed to a new service
- Don't remember

**Figure 17: Reasons for cancelling subscription**



- Video content is an important consideration in subscription decisions. Over 20% of people will see if there is still any video content appealing to them before making a renewal decision.
- Price is another factor. 23% of respondents indicated subscription services need to give way to other services and products which are more important.



## People aged 35-44 are more willing to pay full price for video streaming services appealing to them

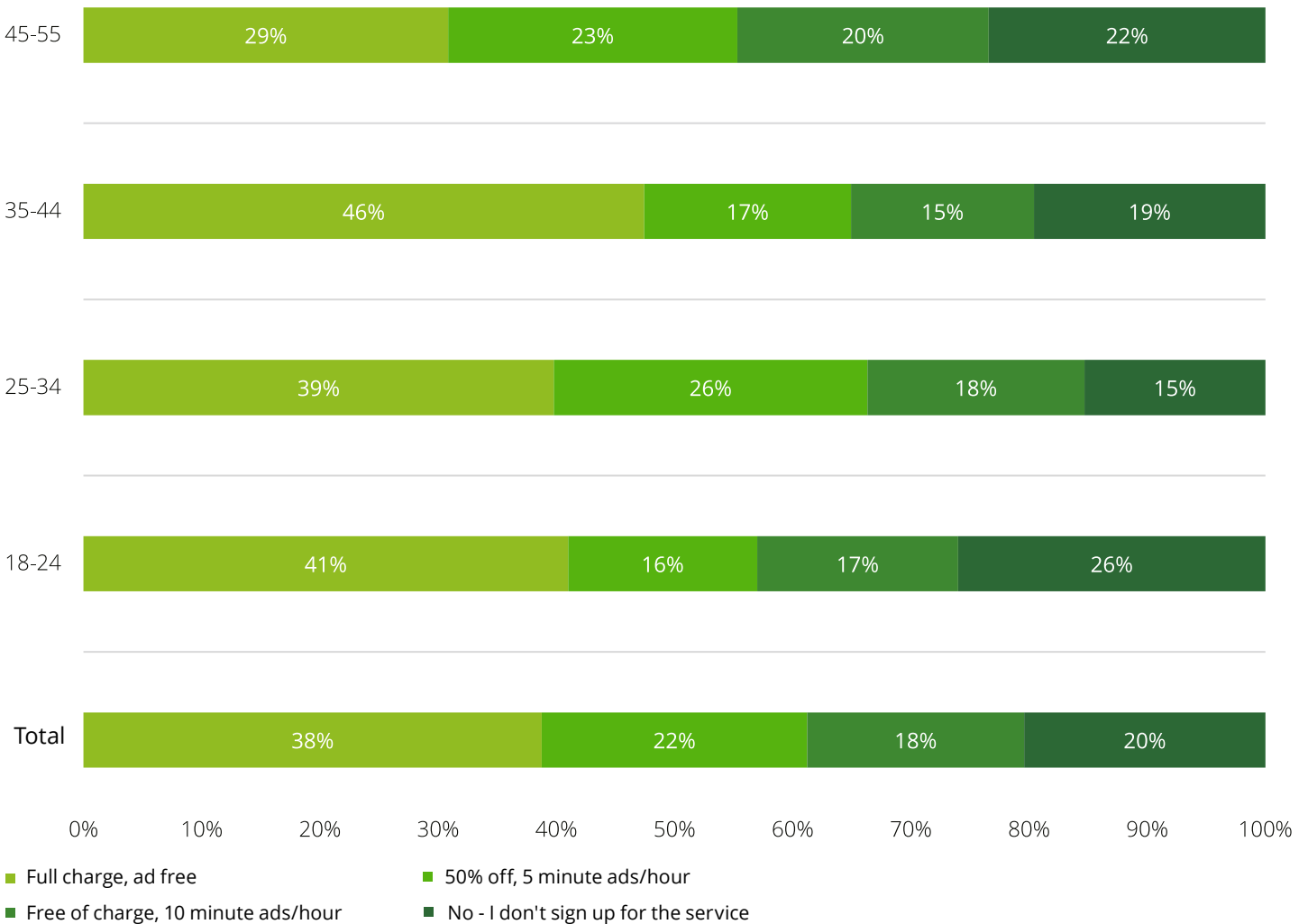


Now, assume there is a new video streaming service appealing to you. Which of the following (if any) is more appealing to you if you could watch ads in return of a lower subscription fee or a free subscription?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 18: Interest in ad-supported video streaming platforms**



- Respondents of different age groups show certain discrepancies in ad-free plan subscription. Notably, compared to young people aged 18-24 (41%), those aged 35-44 (46%) are more willing to pay for ad-free subscriptions to avoid disturbance or interruption. Stronger financial strength empowers them to subscribe to paid services based on preferences.
- People aged 25-34 are more tolerant to ads and less willing to pay for subscription, with those paying full price for subscription accounting for around 50%, and this age group is least interested in paid subscription (15%). Young people prefer to go out in their spare time instead of staying at home, and less willing to spend their money for those services.

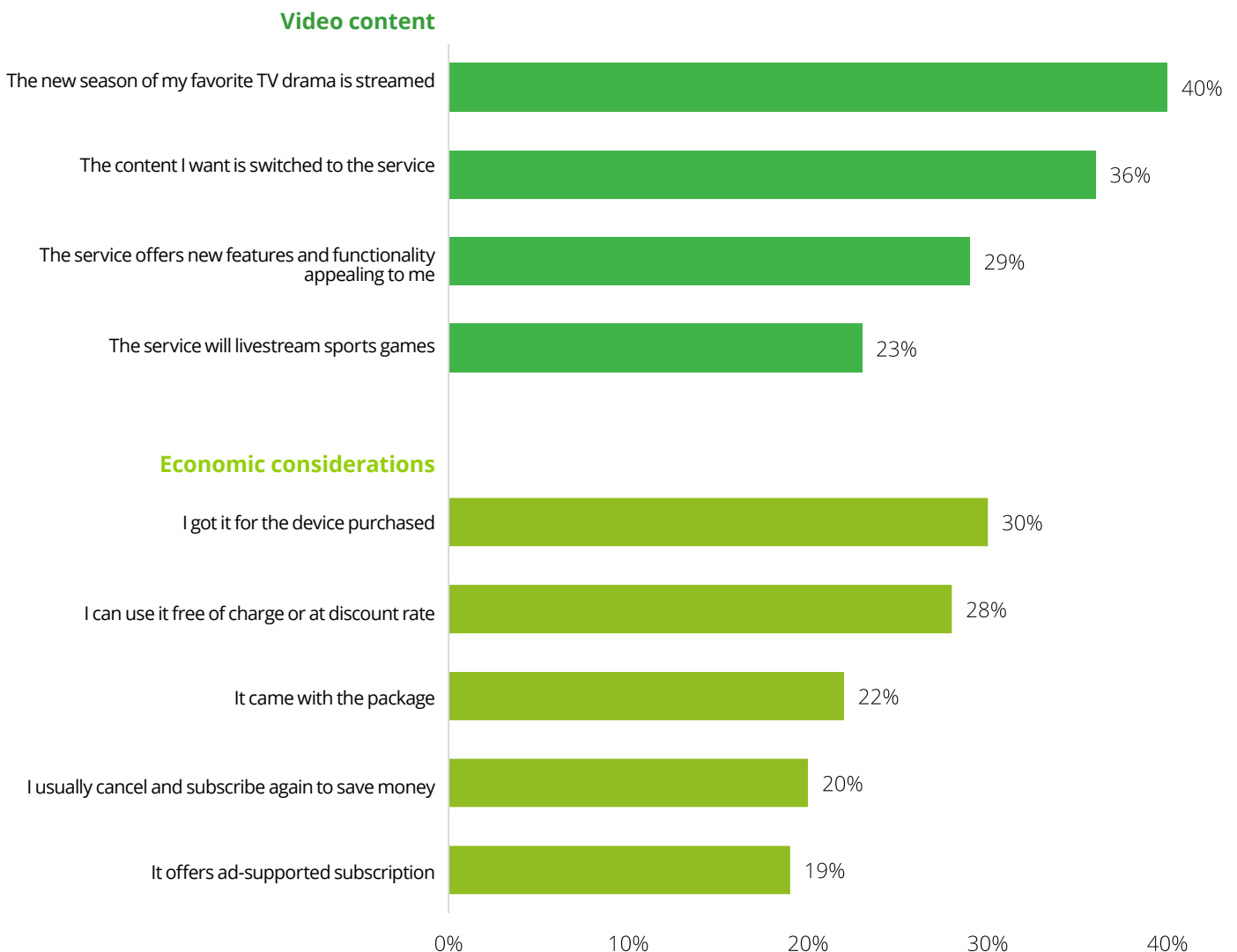
## Consumer will resubscribe to video streaming services out of preference for content



### Which of the following are reasons that you resubscribe to a video streaming service?

Base: All adults 18-55 who resubscribed to a video streaming subscription service in the last 12 months  
 Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 19: Reasons for resubscribing to video streaming services**



- In resubscribing to a video streaming service, respondents tend to consider the returning of TV dramas (40%) and platform switch of digital content (36%), while around 30% of people resubscribed to a service because they received it for the device purchased or a discount rate was offered.
- Digital content preference is an important factor in video stream service subscriptions. Some video platforms own exclusive rights to stream TV dramas and films, whose target audience will subscribe over and over to satisfy their cultural needs.

## Young people prefer to watch a movie at theaters while middle-aged ones like watching it at home

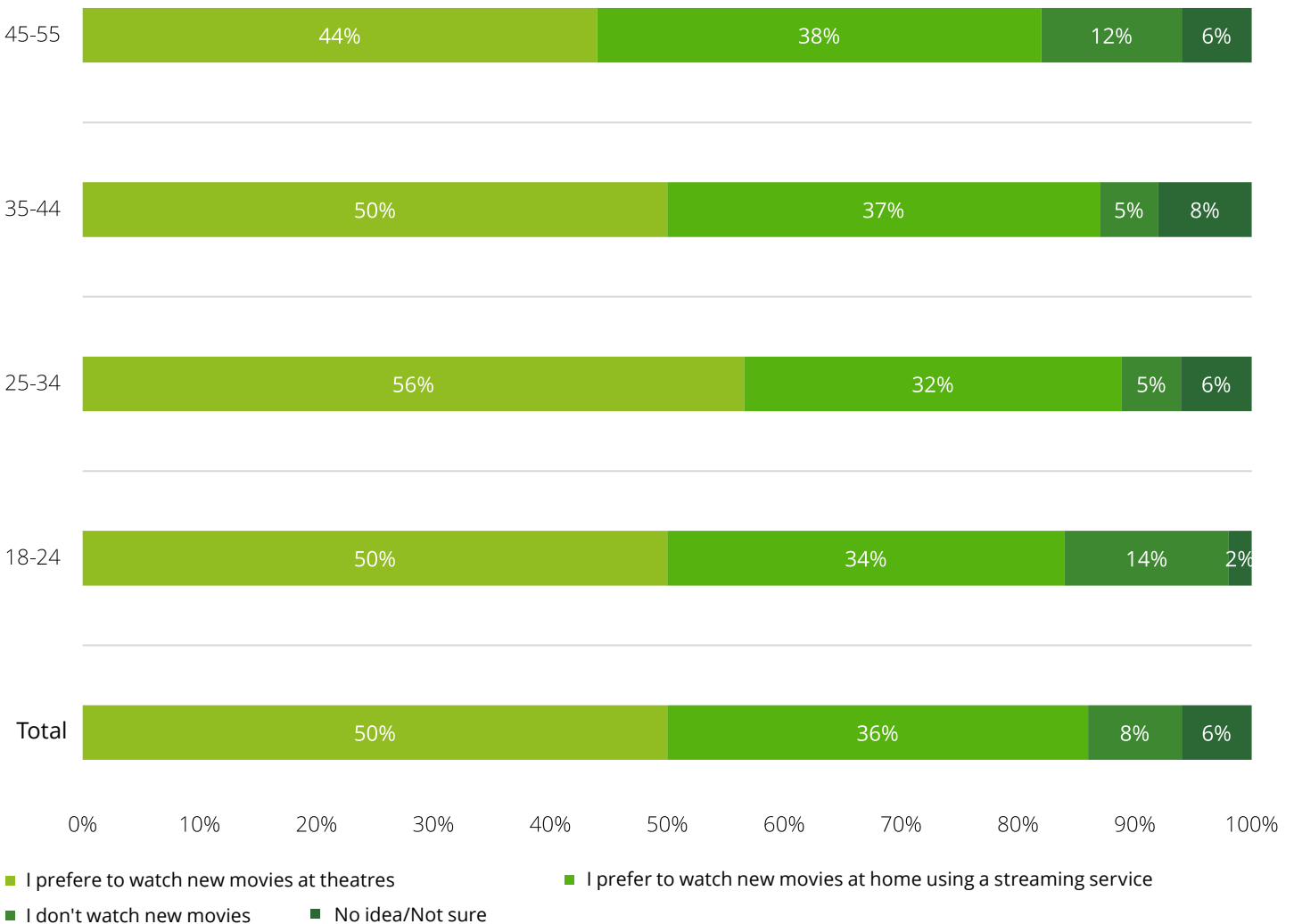


### Which is your preferred way to watch a new movie (regardless of cost)?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 20: Ways to watch new movies**



- Different age groups vary in ways to watch new movies. More than half of those aged 25-34 prefer to go to theatres, 12 percentage points higher compared to respondents aged 45 or above. People aged 25-34 not only show a strong interest toward new things, embracing the diversity of film culture, but also have more free time for outings than under 24 respondents who are under more academic pressure, so they are more willing to watch movies at theaters.
- People aged 45-55 who need to fulfill both family and work obligations have fewer time for outings and less desire for entertainment, so they tend to watch movies through online platforms.



Game



People use smartphones and PCs to play online games more often; respondents aged 25-34 own more types of gaming devices

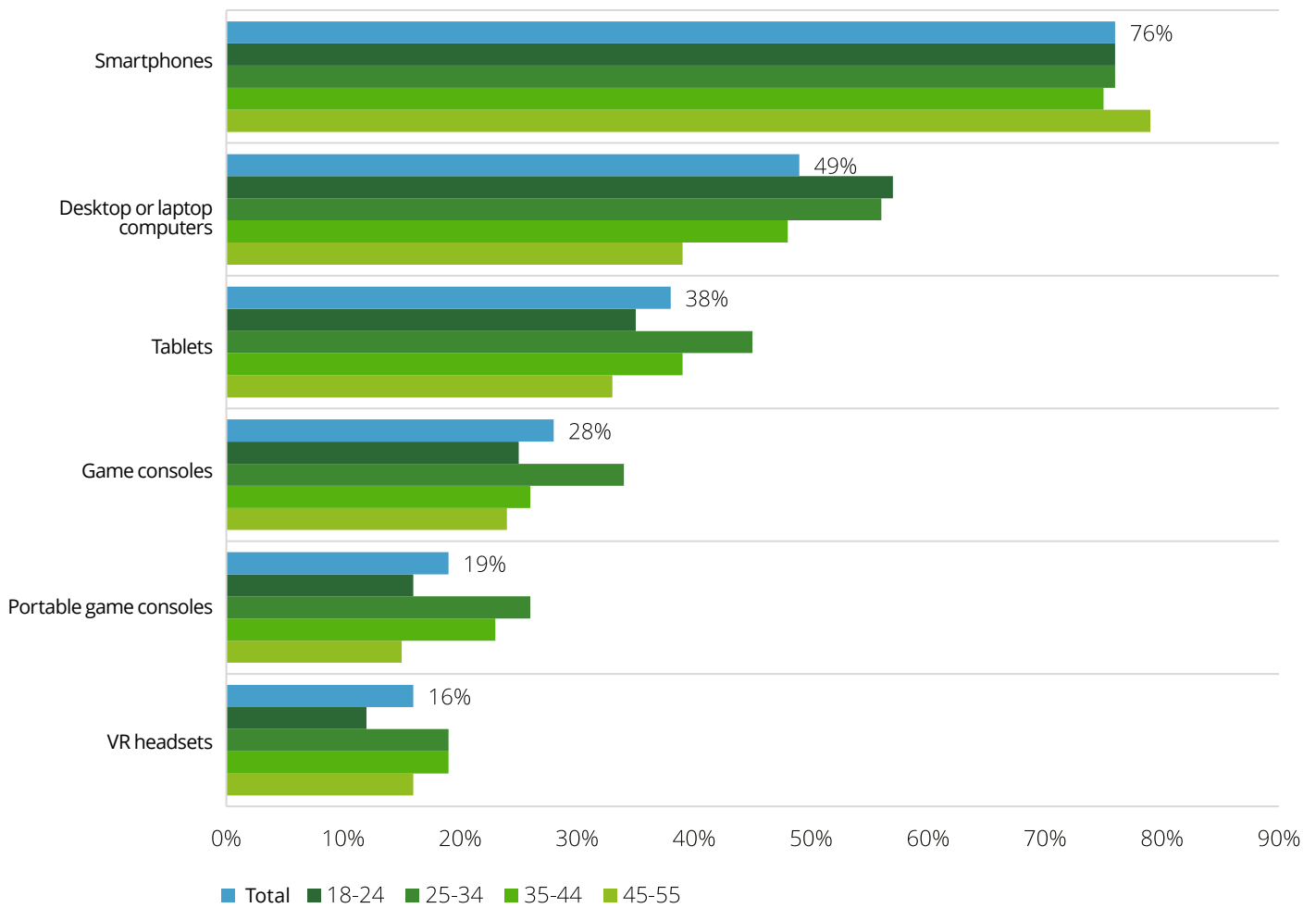


Which of the following (if any) do you often use to play games?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

Figure 21: Use of gaming devices



- Close to 80% of respondents play games on their smartphones which offer convenient and fast access to game apps of a rich variety to perfectly satisfy the entertainment needs of different age groups.
- Still more than half of young people use PCs which was the most popular gaming device before the emergence of smartphones.
- Notably, more gamers aged 25-34 use tablets, game consoles, and VR headsets. What makes game consoles and VR distinct from smartphones is that they offer exclusive access to some special varieties of games delivering more novel and unique gaming experience.

More than half of young people have purchased game credits which are mainly used for buying game skins and upgrading device

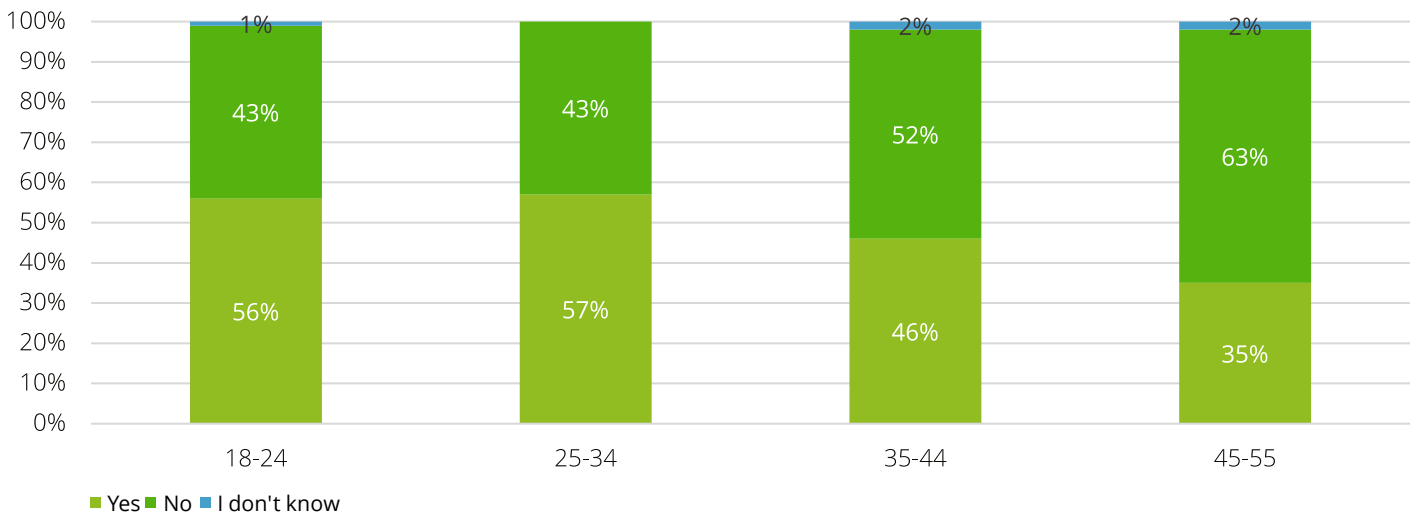


**Have you ever purchased game credits in the past 12 months?**

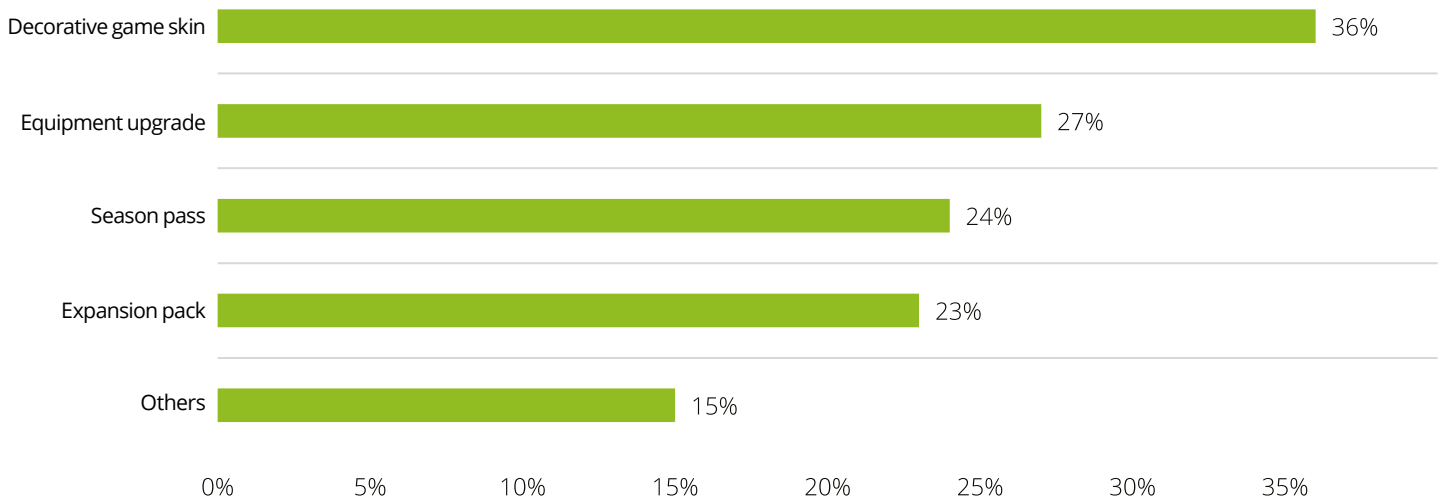
Base: All respondents aged 18-55, 2022 (2,200); All adults 18-55 who play games on any device (half sample - sample B)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 22: Purchasing of game credits**



**Figure 23: Spending of game credits**



- In terms of purchasing game credits, over half the respondents have purchased game credits, and young people aged 18-34 are clearly more interested than middle-aged people. The spending of game credits is diversified, mainly used for decorative game skins (36%) and device upgrades (27%).
- Online games are important leisure and entertainment for young people, who also like spending money on enhancing game experience and gaining a sense of satisfaction and achievement. In contrast, middle-aged people are more rational in their spending and are reluctant to splurge on virtual games.

People still know very little about the metaverse, with three in ten respondents aged over 45 having never heard of it

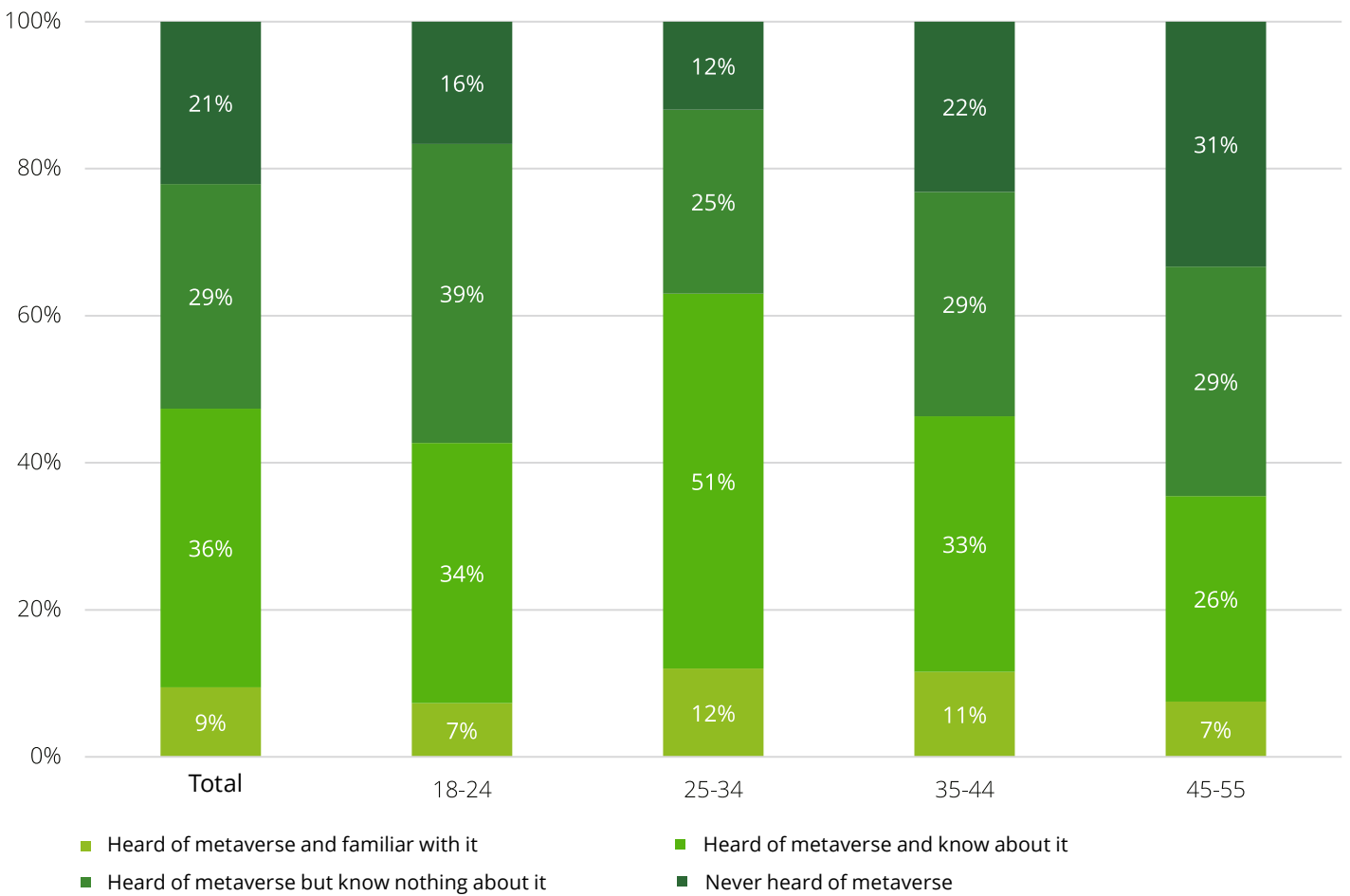


**How familiar are you with the concept of metaverse?**

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 24: Understanding of metaverse**



- The metaverse concept is moderately popular, but it is not well understood, with only 45% of respondents having a certain understanding of it. More young people aged 25-34 are familiar with the concept (12% + 51%), which is far exceeding those aged over 45.
- With the booming digital economy and the continuous advancement of digital technology, people's understanding of the metaverse will further improve.



# Cyber threat



## The government and relevant online platforms should take on more responsibility to maintain cyber security from all aspects

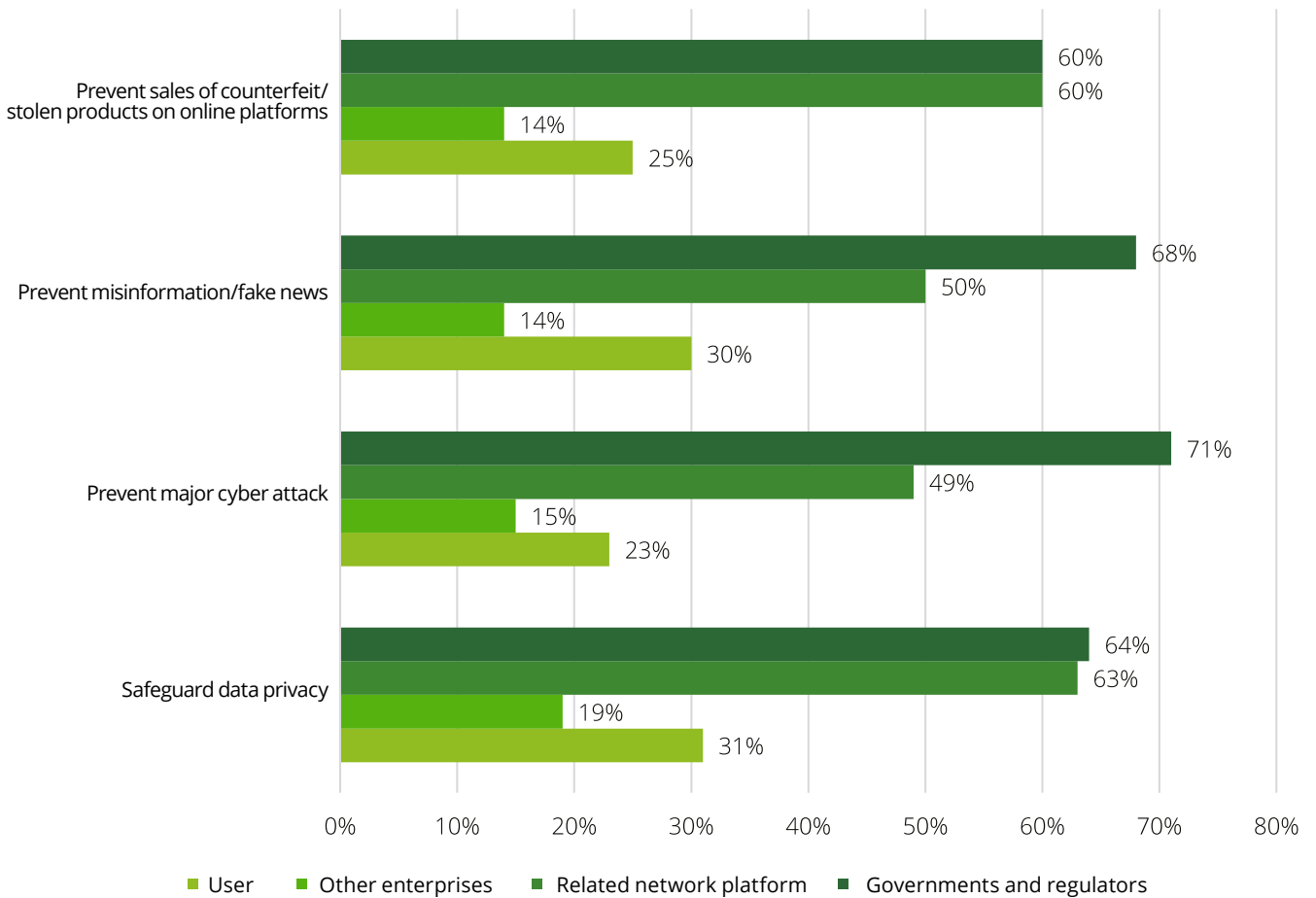


### Who do you think should be responsible for addressing the following cyber threats (if any)?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 25: Who should be responsible for cyber threats**



- In terms of four top concerns, including counterfeit goods, disinformation, cyber attacks and data privacy, more than 60% of respondents believe that governments and relevant regulators should take responsibility for addressing these threats. Relevant online platforms should also play an equally important role regarding counterfeit goods and data privacy.
- With the increasing popularity of the Internet, cyber security issues are increasingly attracting the attention of Internet users. The government should introduce more cybersecurity regulations, improve governance, and guide online platforms to optimize the online ecosystem.
- Meanwhile, Internet users should also continuously improve their cybersecurity awareness and build a strong defense against cyber threats.

More than half of the respondents are aware of the importance of privacy and security, and the awareness decreases with age

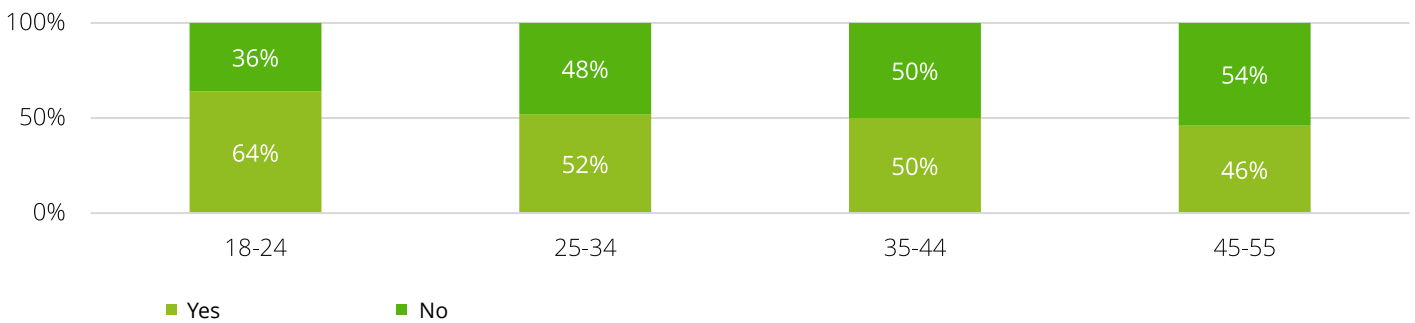


**Which of the following (if any) have you done?**

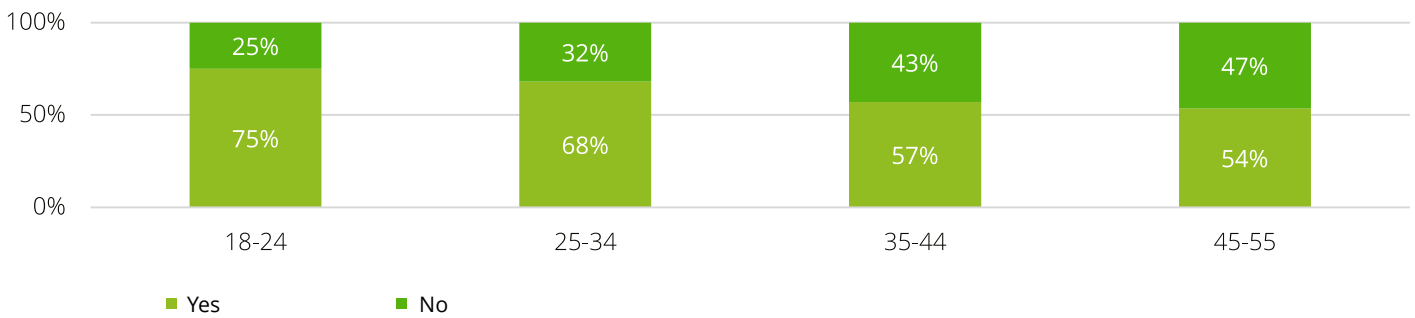
Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

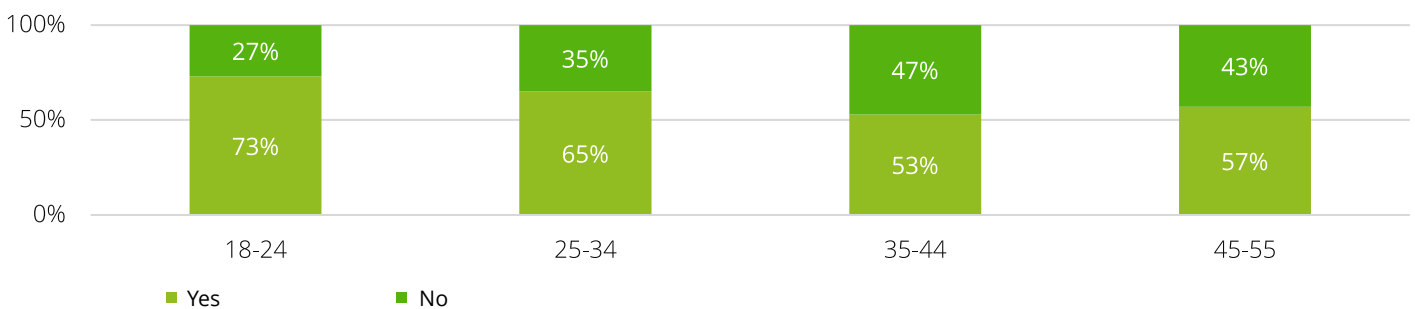
**Figure 26: Avoided buying a device due to privacy concerns**



**Figure 27: Avoided using a service due to privacy concerns**



**Figure 28: Avoided accessing certain feature of a device due to privacy concerns**



- Young people are more aware of privacy protection, and the level of awareness is inversely proportional to age. 64%, 73%, and 75% of young people say they would avoid using a device, a service, or a feature due to privacy concerns, which becomes less common in older people.
- In modern society, the circulation and transparency of personal information is increasing, therefore, young people who have grown up using the Internet are particularly aware of privacy protection. However, middle-aged people who are accustomed to the dissemination of information among acquaintances in traditional society still need to further enhance their awareness of privacy protection.

Most of the time, people are wary of cyber threats including those associated with ad tracking and access permissions

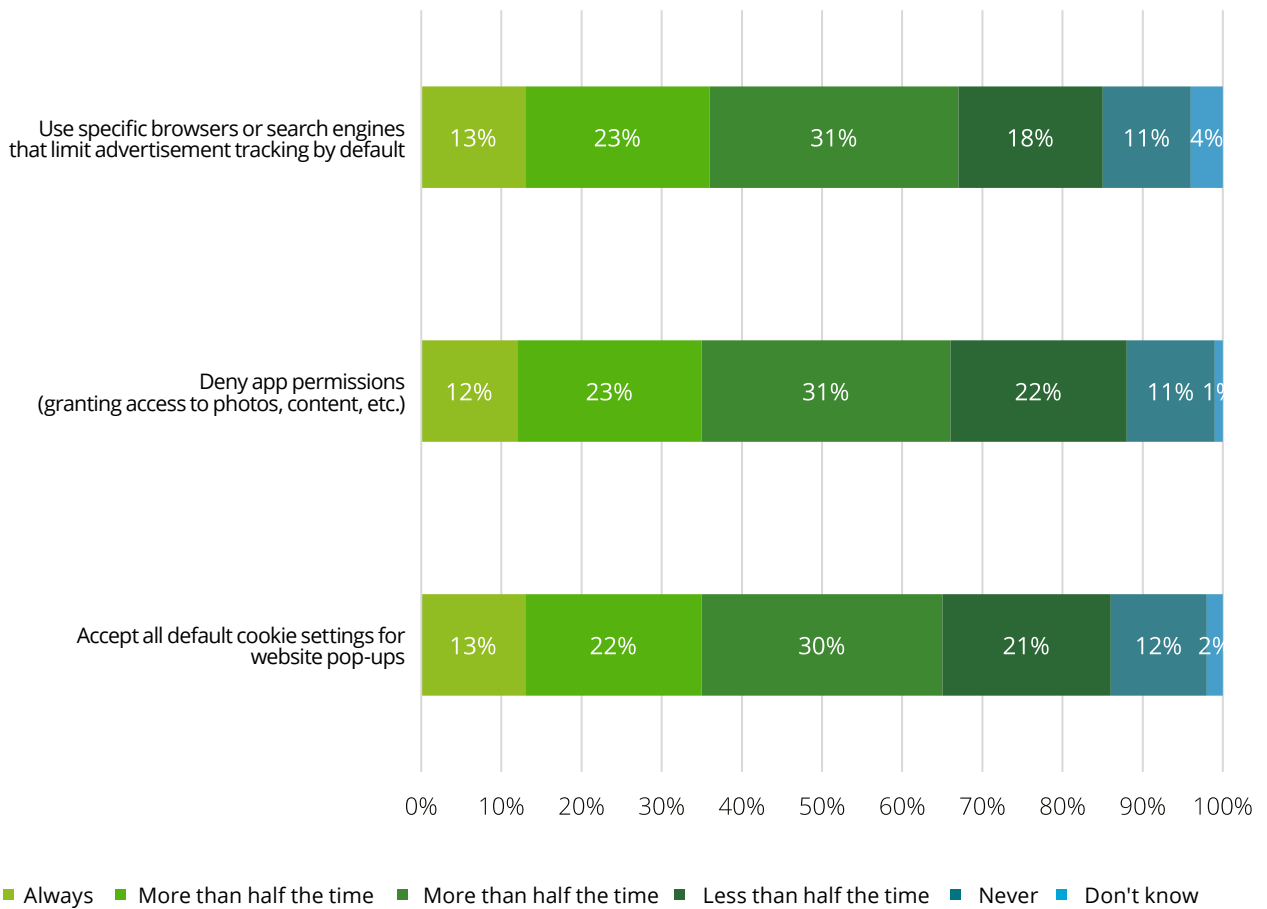


**How often do you use a web browser?**

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 29: Methods of preventing cyber threats**



- According to the survey, less than 40% of respondents regularly use search engines with default restrictions on advertising and deny application access, while 31% remain alert to this about half the time. In terms of cookie settings, only a small part (33%) of respondents reject default cookies more than half the time.
- When using the Internet, people tend to subconsciously accept cookies, access permissions, etc. that automatically pop up at the bottom of the browser. At that time, people are more focused on the target information and less vigilant.

## Respondents aged 25-34 prefer personalized ads, while middle-aged and older groups have no preference

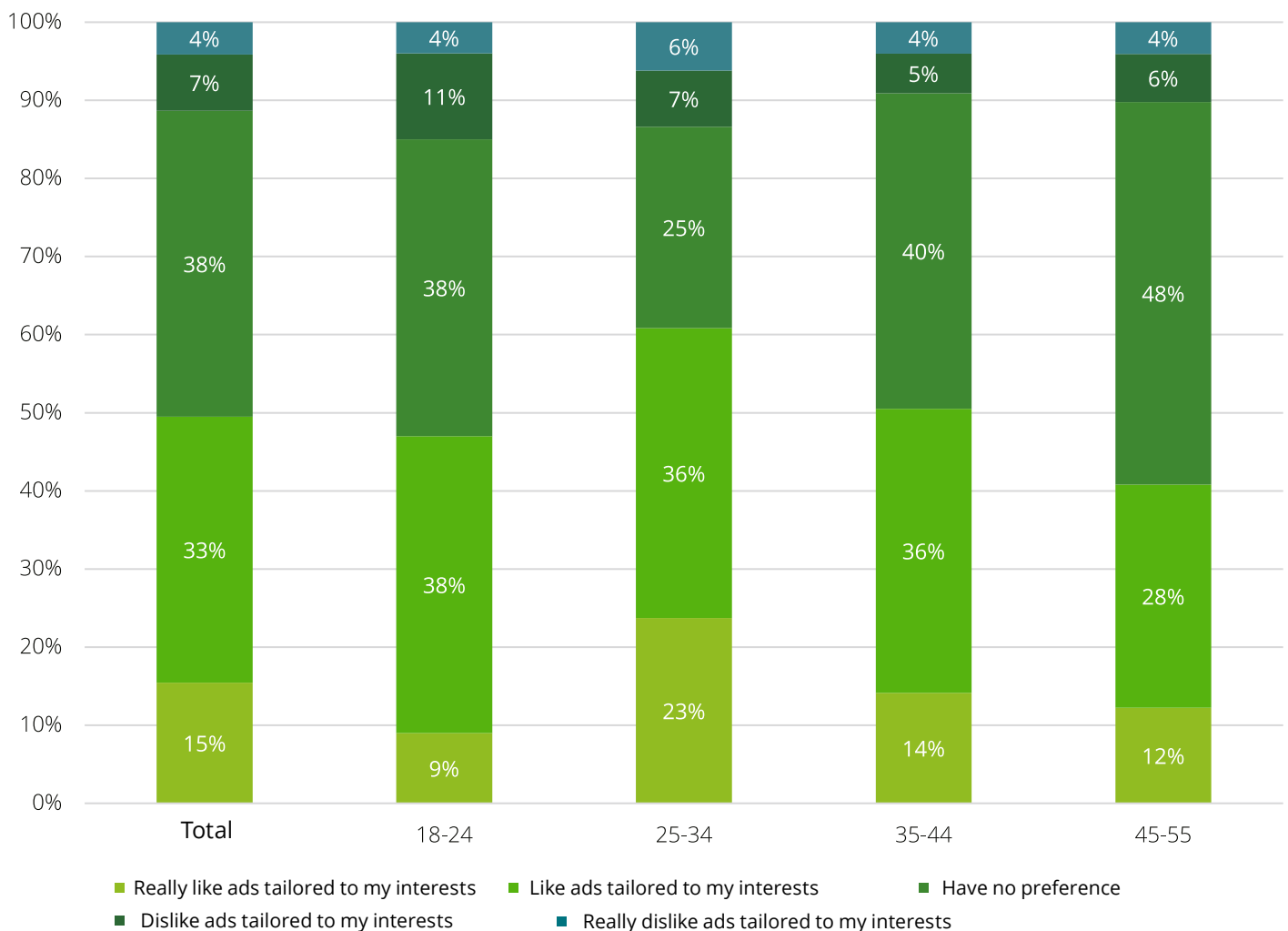


Consider the advertisements you see online and on social media. To what extent would you like the following advertisements to be tailored to your interests or web search content?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

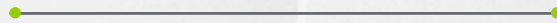
**Figure 30: Attitude toward personalized ads**



- Around 60% (23%+36%) of respondents aged 25-34 have a positive attitude towards personalized ads, significantly higher than other age groups. Among people over 45 years old, 48% hold a neutral opinion due to the lack of understanding and limited exposure to personalized ads.
- People want to see advertisements that match their buying habits and consumption preferences to optimize consumption choices. However, people also hold a wait-and-see attitude towards big data driven insights into consumer preferences.



# Crypto-currency



People are unfamiliar with crypto-currency, with some respondents having never heard of it

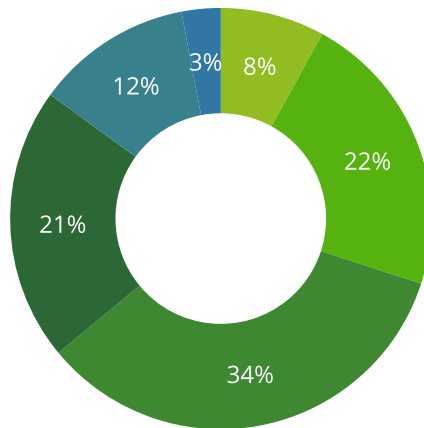


**How much do you know about the following (if any) previously?**

Base: All respondents aged 18-55, 2022 (2,200)

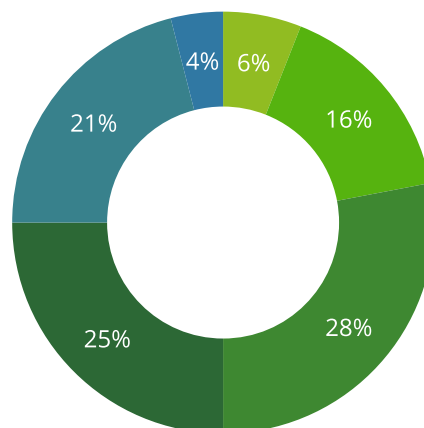
Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 31: Understanding of crypto-currency**



■ Know it very well  
 ■ Know something about it  
 ■ Know a little about it  
 ■ Have heard of it but hardly know anything about it  
■ Have never heard of it  
 ■ Don't know

**Figure 32: Understanding of non-fungible token**



■ Know it very well  
 ■ Know something about it  
 ■ Know a little about it  
 ■ Have heard of it but hardly know anything about it  
■ Have never heard of it  
 ■ Don't know



- Only 8% and 6% of respondents are very familiar with crypto-currency and NFT, while more than half of people have only heard of and know a little about both. Crypto-currencies such as Bitcoin are slightly better known than NFT: 21% have never heard of the latter.
- The concept of digital assets is a product of the metaverse, and people's knowledge about it needs further improvement. The future development paths and use of digital asset still need to be explored and promoted.

## Only 5% of respondents own digital currency; people's purchase intention is not strong

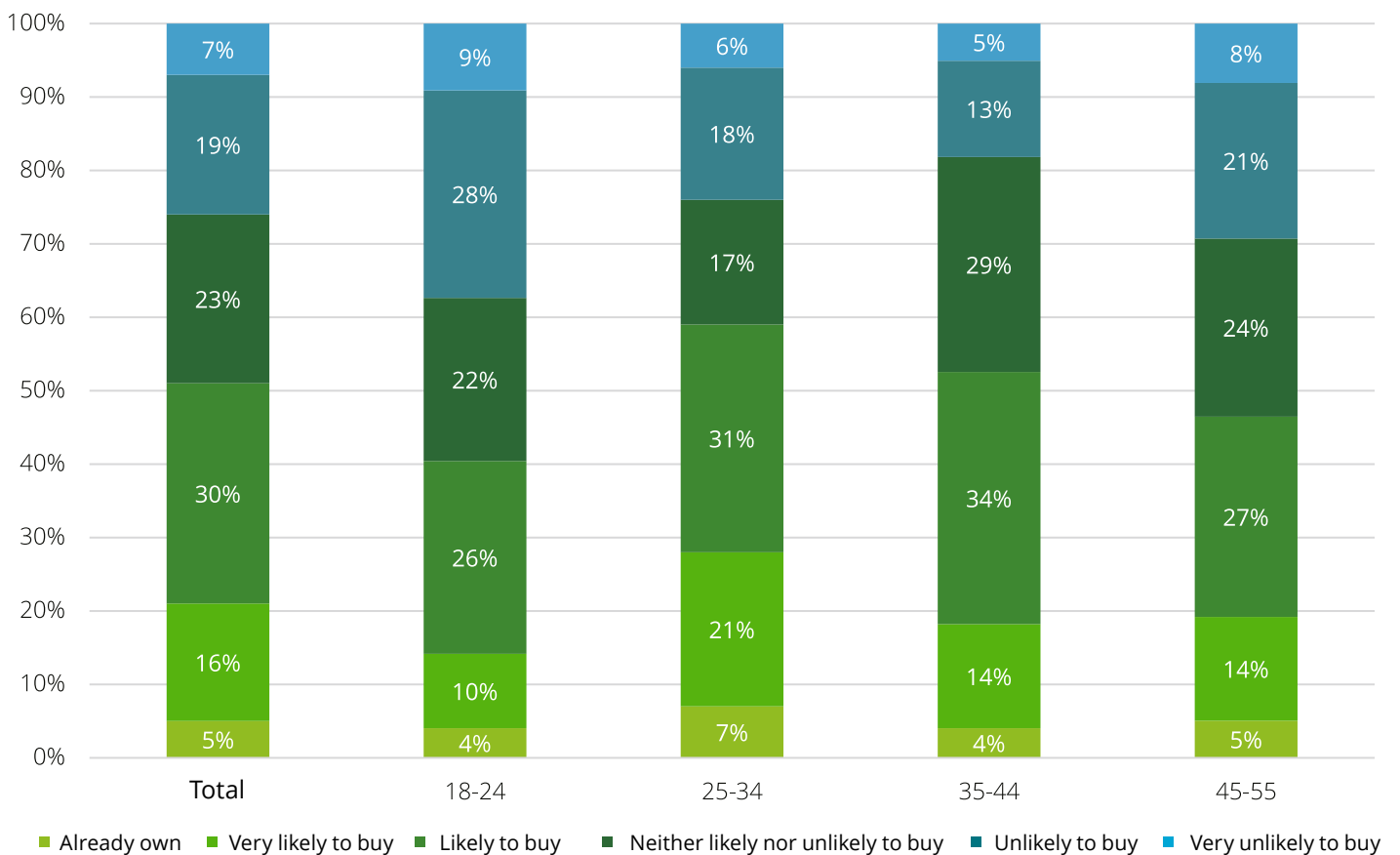


**Do you own any of the following assets? If not, how likely are you to purchase such assets in the next 12 months?**

Base: All adults 18-55 who have heard of crypto-currency/NFTs

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 33: Currency ownership/consumer purchase intention**



- Currently, only 5% of respondents own crypto-currency or NFT. Those aged 25-34 have the highest rate of ownership and the strongest willingness to buy the currency in the future: 21% think they are very likely to buy and 31% think they are likely to buy, which is significantly higher than other age groups.
- People in the middle age group not only have a higher degree of acceptance of technological development and new things, but also have stronger financial strength for digital currency purchasing and investment.

## There is not yet a unified understanding of the potential impact of crypto-currency/NFT on the economy and the environment

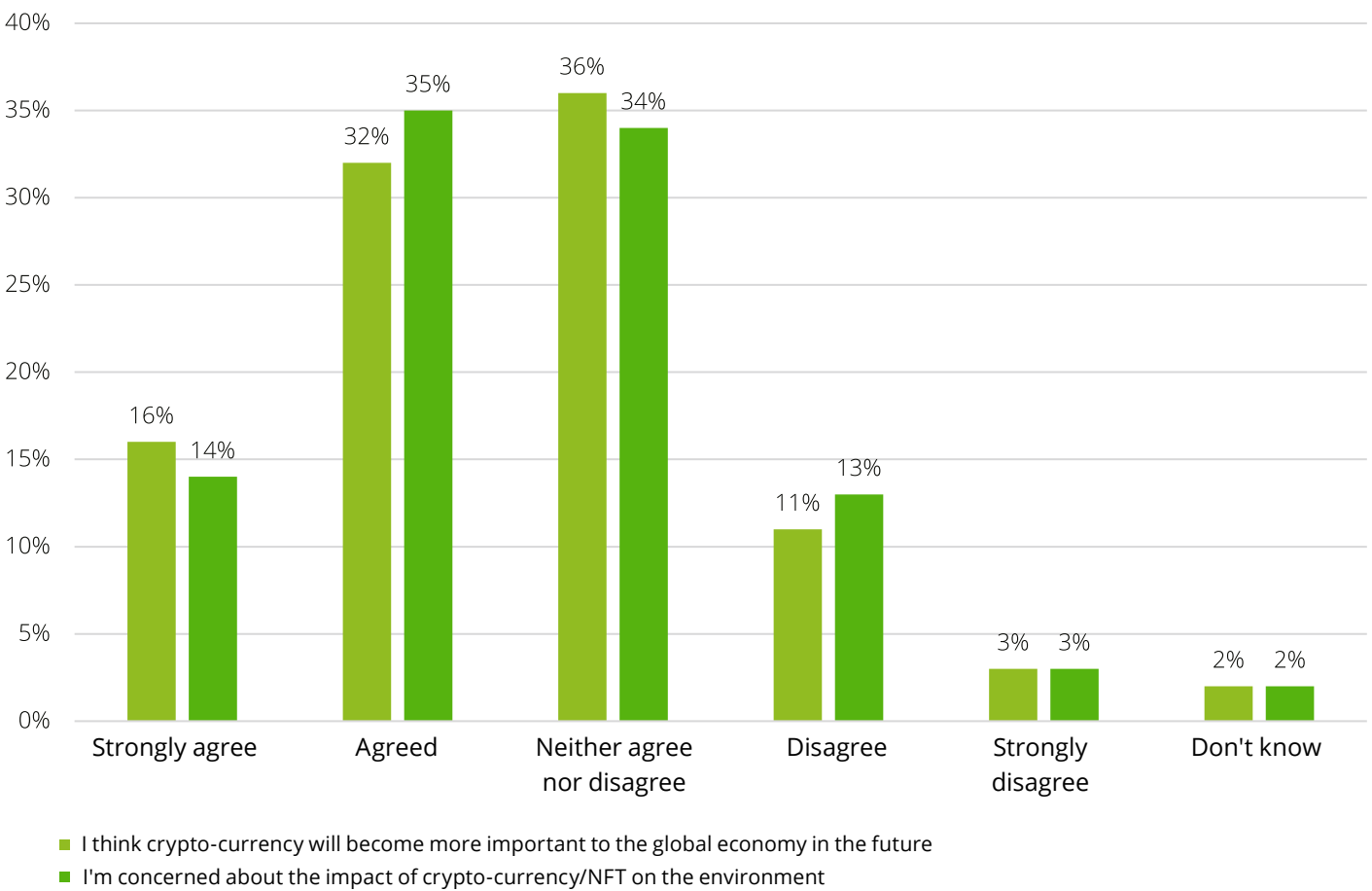


To what extent do you agree or disagree with the following statements?

Base: All adults 18-55 who have heard of crypto-currency

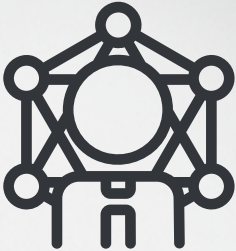
Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 34: Impact of crypto-currency/NFT on the economy and the environment**

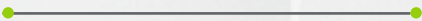


- Overall, people are equally concerned about the impact of emerging currencies on the economy and the environment. While nearly 50% people agree that crypto-currencies are having a significant impact on the economy, they are concerned about the environmental issues that ensue.
- Calculating the carbon footprint of crypto-currencies is more complicated. Mining crypto-currencies not only requires a lot of energy, but also generates a lot of electronic waste. Although crypto-currencies may have a significant impact on future economic and financial systems, people are still concerned about potential environmental issues.





# Connection



With the popularization of the Internet, people will continue to increase Internet services; young people will pay more attention to the quality of Internet services

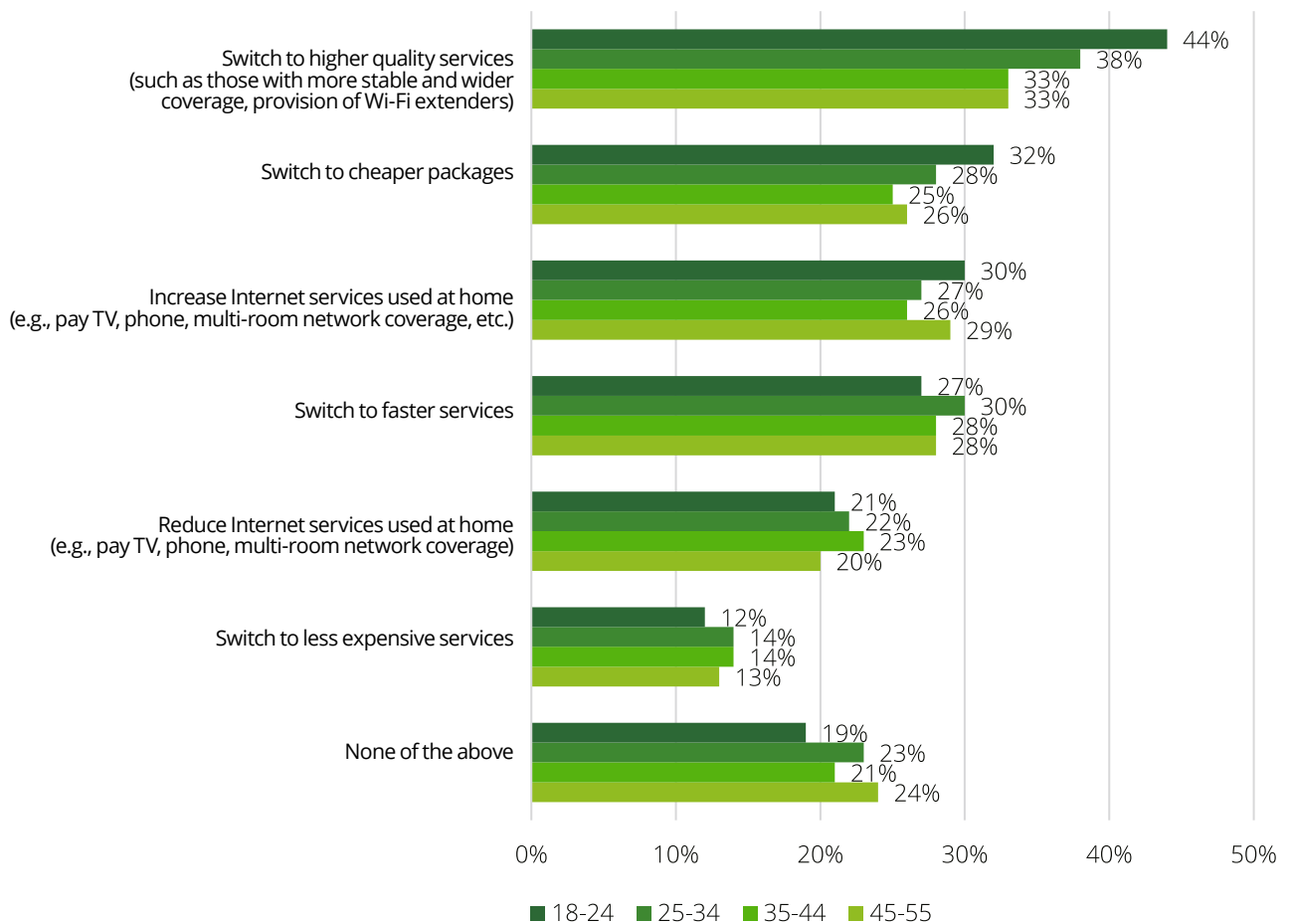


**Which of the following changes (if any) have you made to Internet service in the past 12 months?**

Base: All adults 18-55 who have broadband at home

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 35: Internet service switching behavior**



- According to the survey, around 30% of respondents will upgrade the quality and speed of their home Internet services to meet their needs. Meanwhile, they will also consider the cost-effectiveness to add services as appropriate.
- Specifically, 44% of those aged 18-24 will switch to high-quality services, significantly higher than other age groups.
- Young people tend to spend more time studying, working and entertaining online, and quality Internet services will bring them better experience.

More than 80% of respondents have not changed their Internet service providers (ISPs) in the past year; while consumers aged 25-34 are more likely to switch services

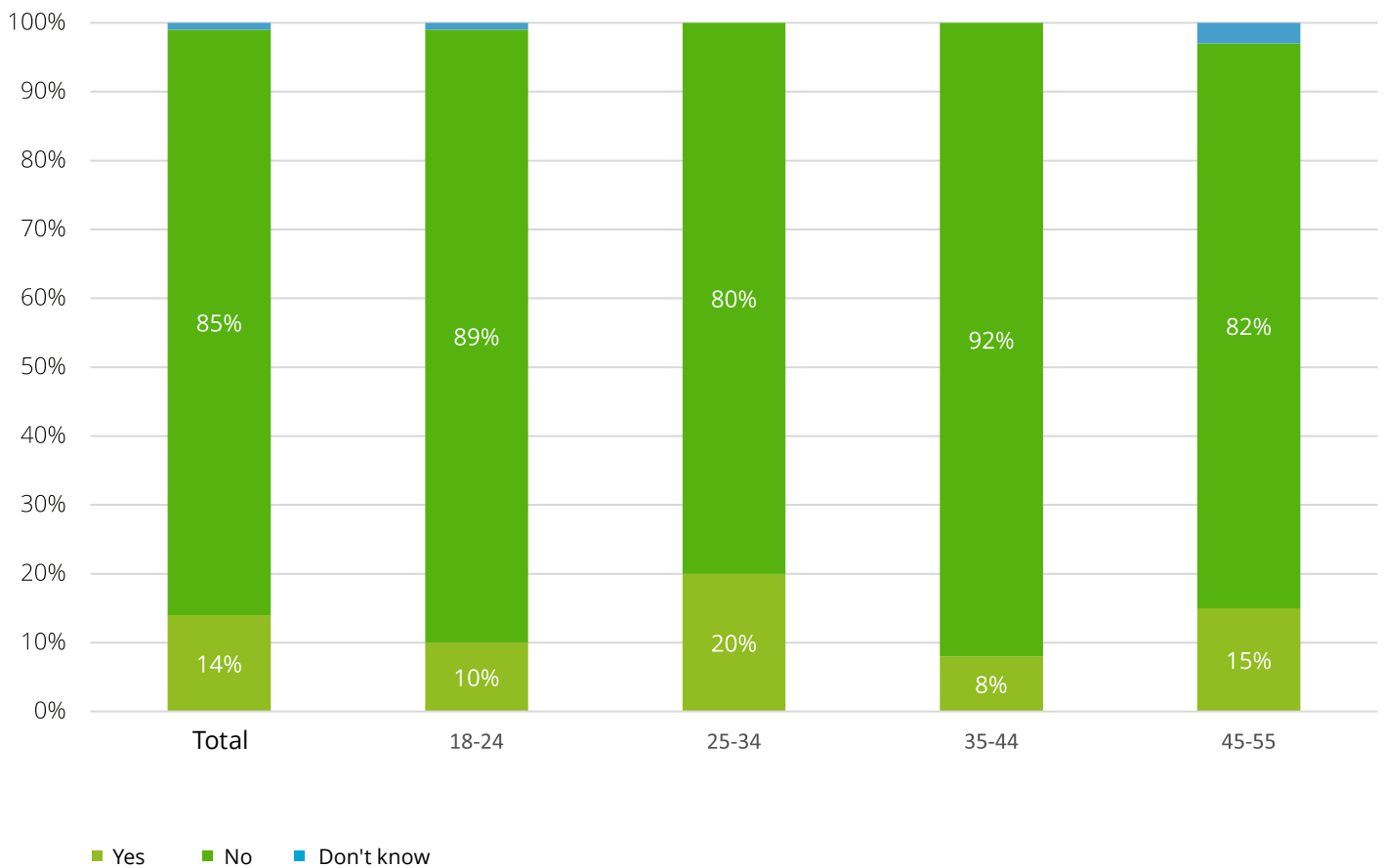


**Have you changed your Internet service provider in the last 12 months?**

Base: All adults 18-55 who have broadband at home

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

**Figure 36: Have you changed your Internet service provider**



- Most respondents have not changed their ISPs in the past year (85%), showing a relatively high user viscosity.
- 20% of those aged 25-34 switched to a different provider last year, significantly higher than other age groups. With the ongoing trend of working online, people may need more stable and high-quality Internet services during work hours, therefore, they will change service providers to fulfill new needs.

Although 40% of respondents are already using 5G, further penetration is still limited by device adoption and network coverage

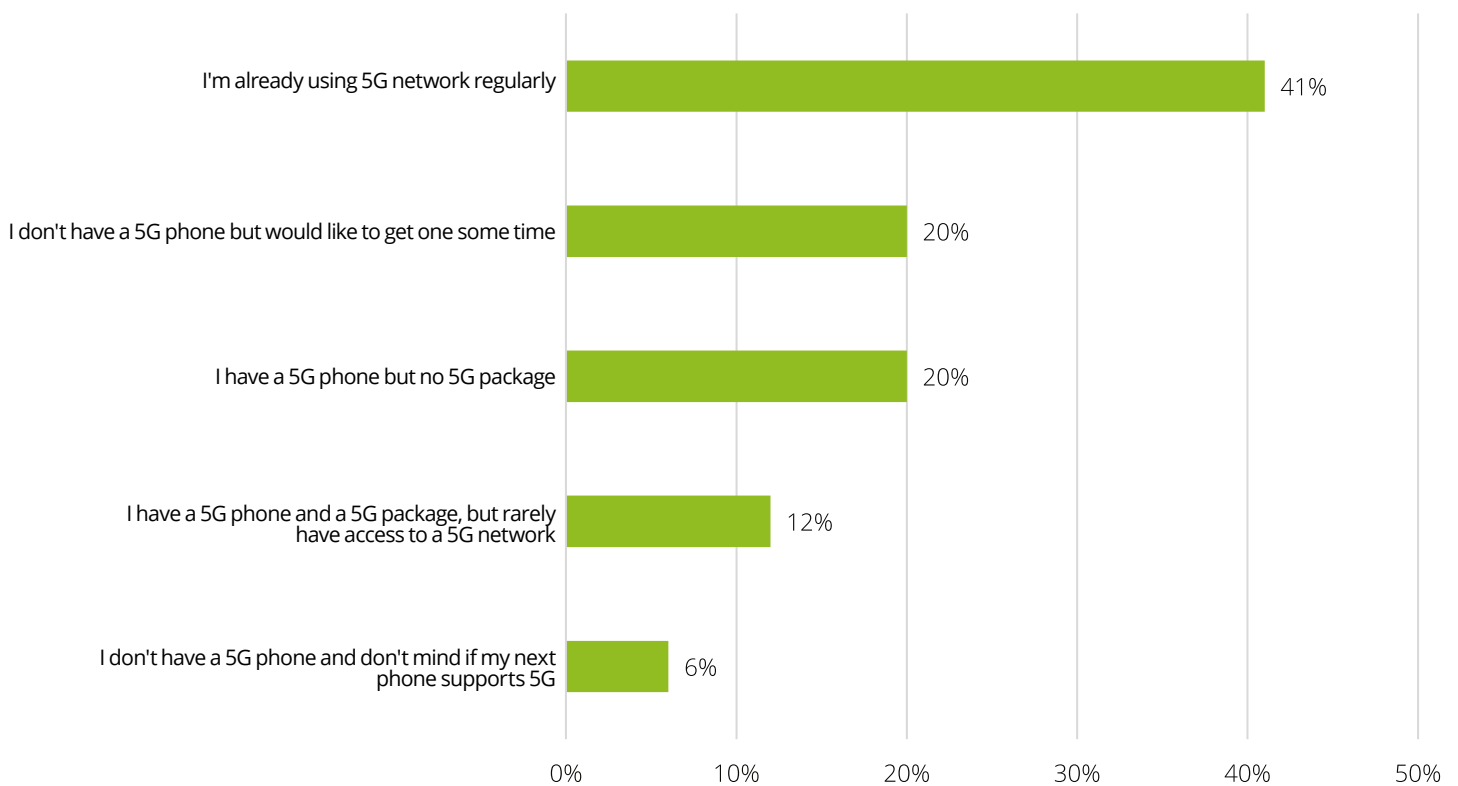


5G networks are shaping the next generation of mobile wireless communication, providing consumers with a mobile Internet approximately five times faster than current 4G/LTE networks. Which of the following best describes your attitude towards 5G networks?

Base: All adults 18-55 who have a phone or smartphone

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

Figure 37: 5G adoption and people's attitude



- The popularity of 5G is increasing. Currently, 41% of respondents said that they use 5G regularly and have already enjoyed the superior internet experience brought by 5G, which effectively replaced the old 4G network. The increased acceptance of 5G has also led to 20% of respondents wanting to purchase a 5G phone some time.
- One fifth of people say they have not yet got a 5G package. Connecting to 5G networks will significantly increase the phone's energy consumption and chance of overheating, greatly reducing the battery endurance. For people who are satisfied with 4G networks, even if they have a 5G phone, they will choose to turn off 5G and no longer use a 5G package.
- Meanwhile, there are problems with the low coverage of 5G single-station and insufficient distribution of base stations, making it difficult for some respondents (12%) to connect to a 5G network even if they have 5G phones and packages.

## Most people are embracing 5G given its better performance than 4G

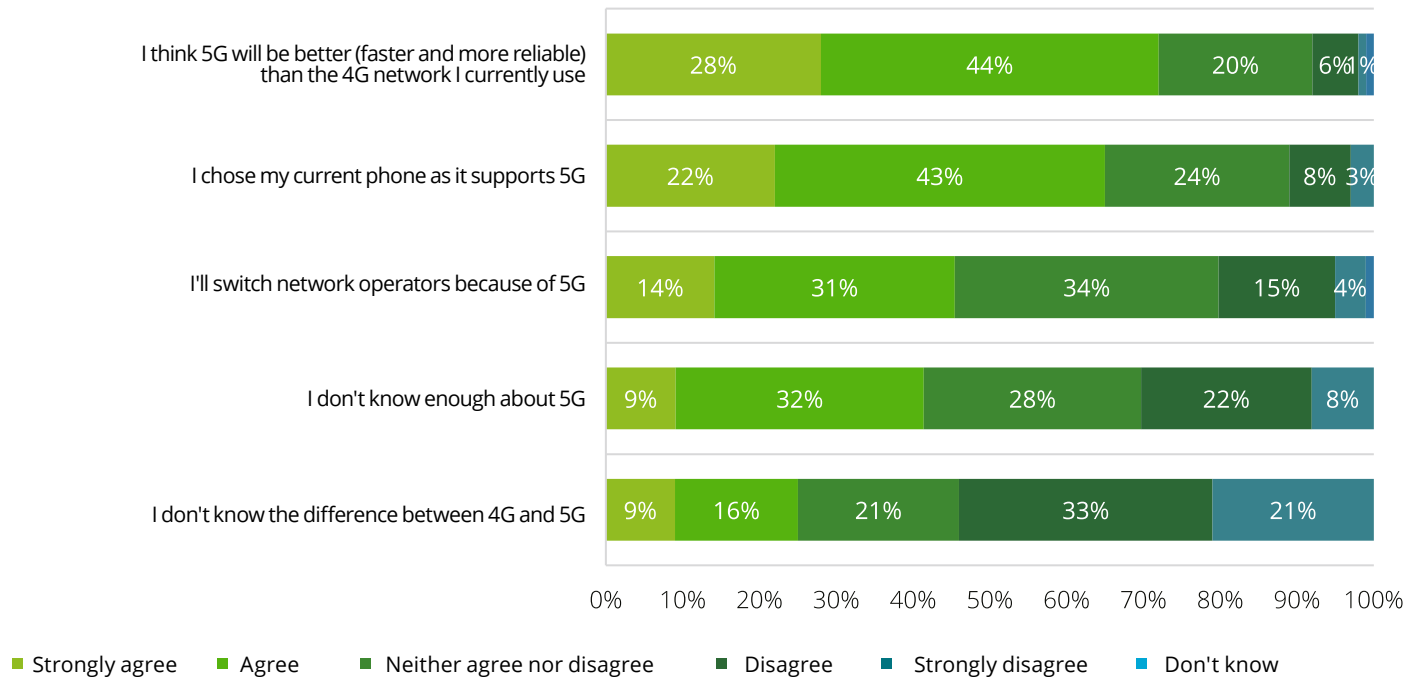


Please consider the rollout of 5G in China, to what extent do you agree or disagree with the following statements?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

Figure 38: Attitude towards the following statements regarding 5G



- 5G connection can bring better Internet experience. More than 70% of respondents believe that switching to 5G will bring them better mobile connectivity. With stronger signal, faster transmission, and lower latency, there is no doubt that 5G will offer users better Internet experience. However, a small number of people are still "neutral and unsure" about 5G connection, probably due to insufficient understanding of 5G and its differences with 4G.
- For better Internet experience, many respondents would choose to spend on a 5G phone (65%) and would also replace their original network service provider with a 5G carrier (45%). Acceptance of 5G is growing. More and more people see that in the future, 5G will become the common data network standard just like 4G replacing 3G, and they are less resistant to this change.



# Communication and socialization

While people tend to communicate face-to-face in most cases, audio/video calls have become the preferred choice for meetings and communication with relatives and family who don't live with them

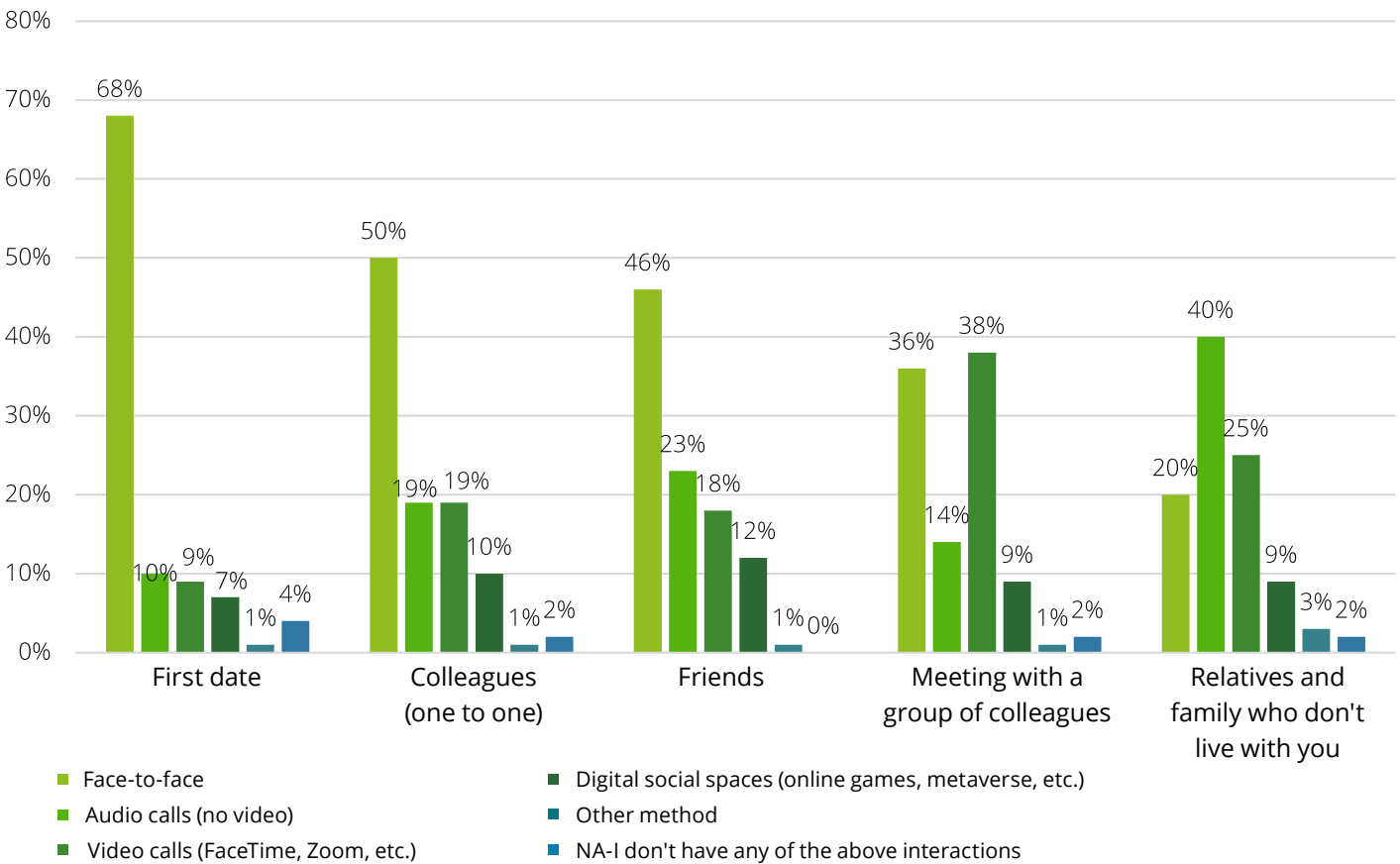


In the next question, please consider situations where you frequently “meet” with people. The situations can include face-to-face meetings, virtual meetings, or phone calls. If you have a choice, in each of the following situations, which method would you prefer to use?

Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

Figure 39: Method to communicate with different groups of people



- The survey found that people tend to choose face-to-face communication on a first date (68%), looking to express sincere emotions through physical contact and interaction.
- The COVID-19 pandemic has seen significant changes in the way people meet and communicate. This trend has continued over the past year.
- 65% of respondents choose to stay in touch with loved ones through voice and video calls. They stay in contact through virtual socializing to ease the longing for not being able to meet.
- More than half of people also use remote audio and video when meet with colleagues. The convenience and efficiency of online work breaks the space barrier and continues to be widely adopted in a post-pandemic world.

## People’s spending on tech products, subscriptions, and the Internet is steadily rising, especially among respondents aged 25-34

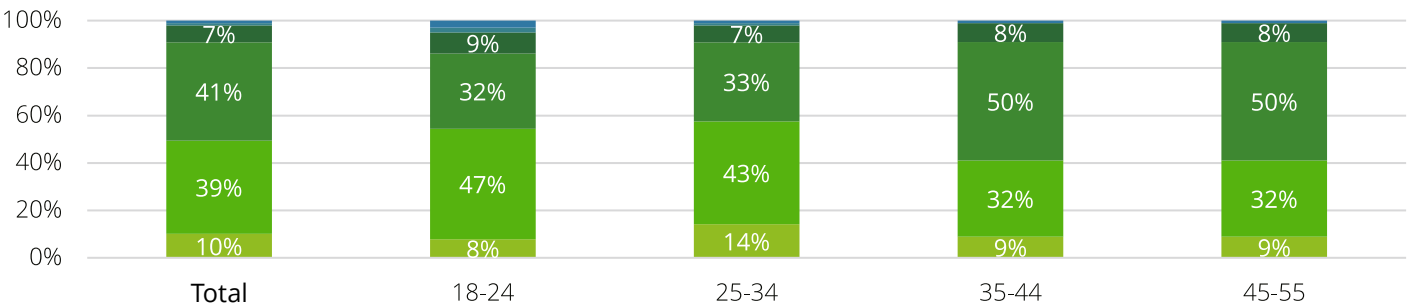


Compared with 2021, do you think your expenditures in the following areas will increase, decrease, or remain unchanged in 2022?

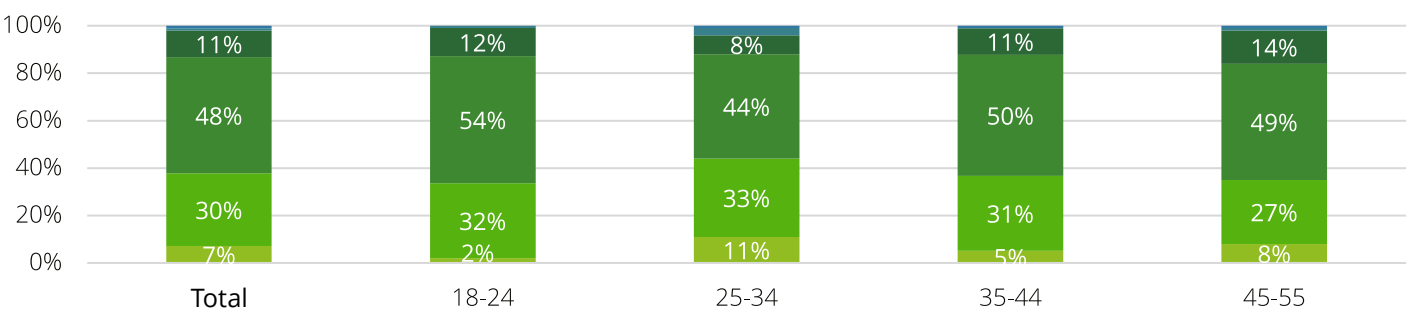
Base: All respondents aged 18-55, 2022 (2,200)

Source: Deloitte Global Mobile Consumer Survey, China edition, June-July 2022

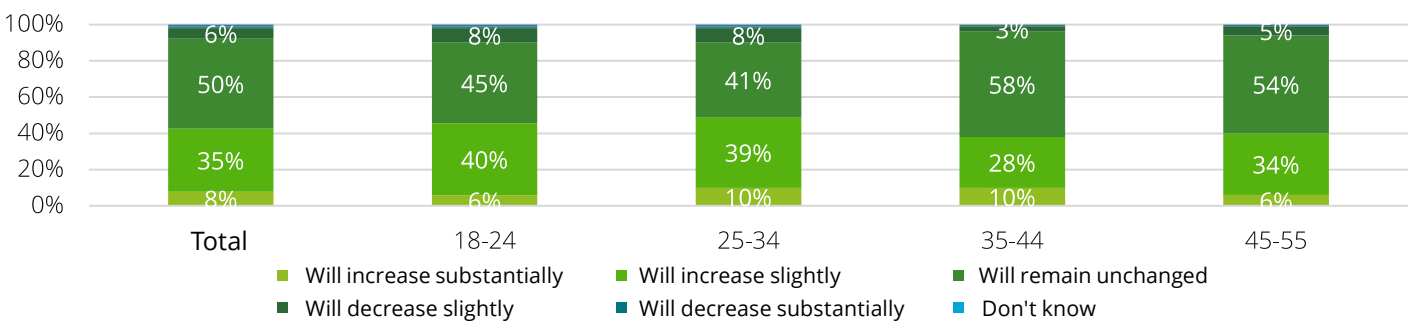
**Figure 40: Expenditures on tech products**



**Figure 41: Expenditures on subscriptions**



**Figure 42: Expenditures on the Internet**



- The Internet and new media are increasingly becoming an integral part of people's work, life and entertainment. With the improvement of living standards, people’s spending on tech products, subscription services and the Internet has steadily increased. They seek more advanced tech products, more varieties of services, and a higher quality of online environment. A significant portion of consumers expect their spending on these three things to increase in 2022 (49%, 37%, 43%), with only one in ten respondents believing they will reduce these expenditures. Specifically, people are more willing to spend on new gadgets to upgrade intelligent products and services.
- More respondents aged 25-34 expect to spend more in the future, at 57%, 44% and 49% respectively, significantly higher than the average and other age groups. Not only do they have more stable and higher incomes than younger people, but also use the internet more frequently for work and entertainment than the middle-aged and elderly.



# Global Digital Consumer Survey Coverage



6

Continents



22

Countries



35,150

Respondents

## Americas

Mexico

## Europe, Middle East and Africa

Austria Italy  
Belgium Netherland  
Denmark Norway  
Finland Poland  
Germany Sweden  
Ireland U.K.

## Asia pacific

China Philippines  
Japan Singapore  
Indonesia Thailand  
Malaysia Vietnam

# China Digital Consumer Survey



2,200

Representative consumers



18-55

Years of age

# Contacts

## Cheng Zhong

### Deloitte China

Technology, Media & Telecommunications Industry  
Leader

Tel: + 86 10 8520 7842

Email: zhongcheng@deloitte.com.cn

## Lisa Zhou

### Deloitte China

Technology, Media & Telecommunications Industry  
Senior Manager

Tel: +86 10 8512 5909

Email: liyzhou@deloitte.com.cn

## Roger Chung

### Deloitte China

Technology, Media & Telecommunications Industry  
Research Director

Tel: +86 21 2316 6657

Email: rochung@deloitte.com.cn

## Lavender Li

### Deloitte China

Technology, Media & Telecommunications Industry  
Assistant Manager

Tel: +86 23 8969 2507

Email: lavli@deloitte.com.cn

# Office locations

## Beijing

12/F China Life Financial Center  
No. 23 Zhenzhi Road  
Chaoyang District  
Beijing 100026, PRC  
Tel: +86 10 8520 7788  
Fax: +86 10 6508 8781

## Changsha

20/F Tower 3, HC International Plaza  
No. 109 Furong Road North  
Kaifu District  
Changsha 410008, PRC  
Tel: +86 731 8522 8790  
Fax: +86 731 8522 8230

## Chengdu

17/F China Overseas  
International Center Block F  
No.365 Jiaozhi Avenue  
Chengdu 610041, PRC  
Tel: +86 28 6789 8188  
Fax: +86 28 6317 3500

## Chongqing

43/F World Financial Center  
188 Minzu Road  
Yuzhong District  
Chongqing 400010, PRC  
Tel: +86 23 8823 1888  
Fax: +86 23 8857 0978

## Dalian

15/F Shenmao Building  
147 Zhongshan Road  
Dalian 116011, PRC  
Tel: +86 411 8371 2888  
Fax: +86 411 8360 3297

## Guangzhou

26/F Yuexiu Financial Tower  
28 Pearl River East Road  
Guangzhou 510623, PRC  
Tel: +86 20 8396 9228  
Fax: +86 20 3888 0121

## Hangzhou

Room 1206  
East Building, Central Plaza  
No.9 Feiyunjiang Road  
Shangcheng District  
Hangzhou 310008, PRC  
Tel: +86 571 8972 7688  
Fax: +86 571 8779 7915

## Harbin

Room 1618  
Development Zone Mansion  
368 Changjiang Road  
Nangang District  
Harbin 150090, PRC  
Tel: +86 451 8586 0060  
Fax: +86 451 8586 0056

## Hefei

Room 1506 Tower A China Resource  
Building  
No.111 Qian Shan Road  
Shu Shan District  
Hefei 230022, PRC  
Tel: +86 551 6585 5927  
Fax: +86 551 6585 5687

## Hong Kong

35/F One Pacific Place  
88 Queensway  
Hong Kong  
Tel: +852 2852 1600  
Fax: +852 2541 1911

## Jinan

Units 2802-2804, 28/F  
China Overseas Plaza Office  
No. 6636, 2nd Ring South Road  
Shizhong District  
Jinan 250000, PRC  
Tel: +86 531 8973 5800  
Fax: +86 531 8973 5811

## Macau

19/F The Macau Square Apartment H-L  
43-53A Av. do Infante D. Henrique  
Macau  
Tel: +853 2871 2998  
Fax: +853 2871 3033

## Nanchang

Unit 08-09, 41/F Lianfa Plaza  
No.129 Lv Yin Road  
Honggutang District  
Nanchang 330038, PRC  
Tel: +86 791 8387 1177  
Fax: +86 791 8381 8800

## Nanjing

40/F Nanjing One IFC  
347 Jiangdong Middle Road  
Jianye District  
Nanjing 210019, PRC  
Tel: +86 25 5790 8880  
Fax: +86 25 8691 8776

## Ningbo

Room 1702 Marriott Center  
No.168 Heyi Road  
Haishu District  
Ningbo 315000, PRC  
Tel: +86 574 8768 3928  
Fax: +86 574 8707 4131

## Sanya

Floor 16, Lanhaihuating Plaza  
(Sanya Huaxia Insurance Center)  
No. 279, Xinfeng street  
Jiyang District  
Sanya 572099, PRC  
Tel: +86 898 8861 5558  
Fax: +86 898 8861 0723

## Shanghai

30/F Bund Center  
222 Yan An Road East  
Shanghai 200002, PRC  
Tel: +86 21 6141 8888  
Fax: +86 21 6335 0003

## Shenyang

Unit 3605-3606,  
Forum 66 Office Tower 1  
No. 1-1 Qingnian Avenue  
Shenhe District  
Shenyang 110063, PRC  
Tel: +86 24 6785 4068  
Fax: +86 24 6785 4067

## Shenzhen

9/F China Resources Building  
5001 Shennan Road East  
Shenzhen 518010, PRC  
Tel: +86 755 8246 3255  
Fax: +86 755 8246 3186

## Suzhou

24/F Office Tower A, Building 58  
Suzhou Center  
58 Su Xiu Road, Industrial Park  
Suzhou 215021, PRC  
Tel: +86 512 6289 1238  
Fax: +86 512 6762 3338 / 3318

## Tianjin

45/F Metropolitan Tower  
183 Nanjing Road  
Heping District  
Tianjin 300051, PRC  
Tel: +86 22 2320 6688  
Fax: +86 22 8312 6099

## Wuhan

Unit 1, 49/F  
New World International Trade Tower  
568 Jianshe Avenue  
Wuhan 430000, PRC  
Tel: +86 27 8538 2222  
Fax: +86 27 8526 7032

## Xiamen

Unit E, 26/F International Plaza  
8 Lujiang Road, Siming District  
Xiamen 361001, PRC  
Tel: +86 592 2107 298  
Fax: +86 592 2107 259

## Xi'an

Unit 3003, 30/F China Life Finance Centre  
11 Tangyan Road, High-tech Zone  
Xi'an 710075, PRC  
Tel: +86 29 8114 0201  
Fax: +86 29 8114 0205

## Zhengzhou

Unit 5A10, Block 8, Kineer Center  
No.51 Jinshui East Road  
Zhengdong New District  
Zhengzhou 450018, PRC  
Tel: +86 371 8897 3700  
Fax: +86 371 8897 3710



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