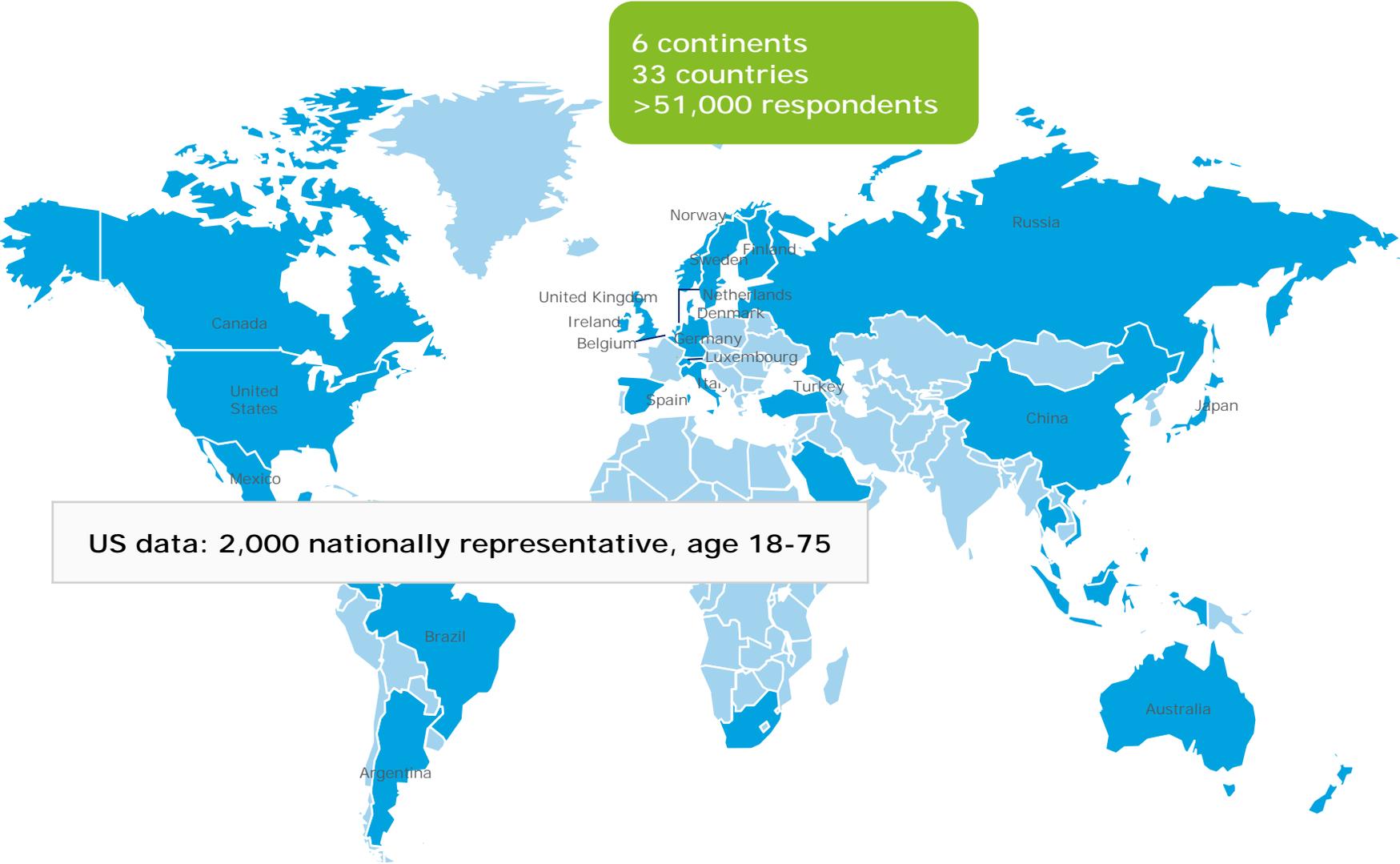


Deloitte.



Global Mobile Consumer Survey
US results

Deloitte Global Mobile Consumer Survey 2017



Summary themes

Device addiction shifts to device etiquette

After consecutive years of increasing usage of mobile phones, there are signs that usage habits are maturing and becoming more well defined.

Older generations mirror the younger

The older generations (55+) are the source of the highest CAGR smartphone growth, the most consistent users of smartwatches, and have some of highest daily use of smartphones.

Wireless is everywhere

In terms of both usage of services and device penetration, wireless has penetrated nearly every aspect of society.



Networks: The Core of wireless

In 2017 Wi-Fi took two important leads: jumping in preference for internet connectivity, and breaking a multi-year lead 4G had in terms of performance.

Connecting the dots on IoT

As IoT continues to progress, what's popular is becoming clearer, and cars are beating the home for the ultra-connected environment.

Consumer privacy

Consumers continue to express concerns about security and privacy, captured in the data regarding the risks they perceive with IoT, mPayments, and autonomous vehicles.

Device addiction shifts to device etiquette



After consecutive years of increasing usage of mobile phones, there are signs that usage habits are maturing and becoming better defined. Whether it is our usage frequency, timing or the activities, all categories are stabilizing and pointing out to the formation of set of habits in the society and a naturally developed device etiquette.

We check our phones all day, every day: **47** times per day.
Last year this number was also 47, while it was 46 in 2015.



We check our phones first **89%** within an hour.
This number was 88% in 2016 and 2015.



We check our phones before we go to sleep: **81%** within an hour.
This number was 81% in 2016, and 79% in 2015.



We check our phones at night: **52%** of us don't check their phones at night.
This number was 50% last year.

We also try to limit our phone usage:

47%

try to reduce/limit their smartphone usage, mostly by keeping it out of sight or turning its functions off



Top 5 steps taken to limit the usage

38%

Keep their phone in handbag/pocket when meeting other people

32%

Turn off audio notifications

27%

Keep phone in bag/pocket when on my own

26%

Turn off phone at night

26%

Deleted apps

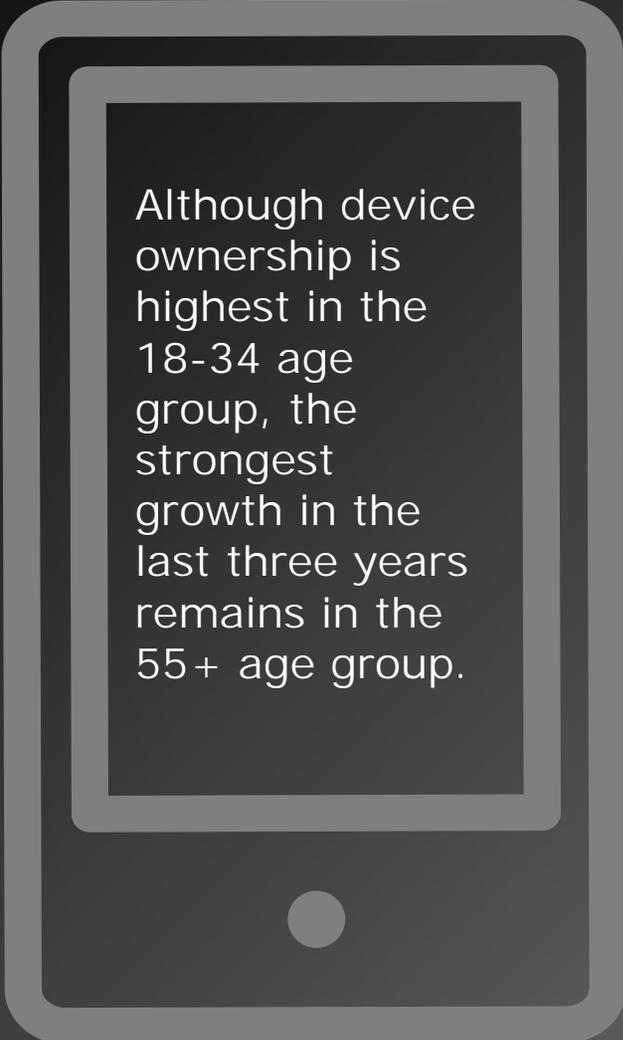
They are part of our daily lives

Most of us — **92%** — use our phones while shopping. 
This number was 93% in 2016 and 92% in 2015.

89% of us use phones while watching TV. 
Same as last year, and 87% in 2015.

Older generations mirror the younger

The older generations (55+) are mobile-relevant! They are the source of the highest CAGR smartphone growth, the most consistent users of wearables such as smartwatches, and have some of the highest daily use of smartphones.



Although device ownership is highest in the 18-34 age group, the strongest growth in the last three years remains in the 55+ age group.

Outside of the 18-24 year olds,



the oldest generations have equal or higher frequency of use for smartphones



Older generations have a comparably high daily usage profile in smart watches



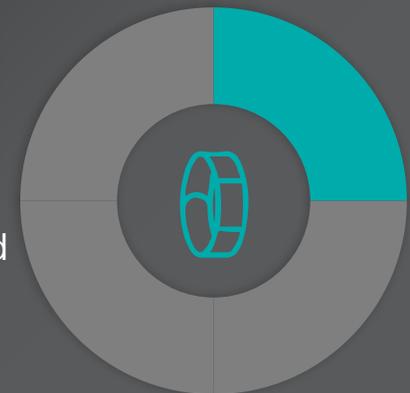
Mobile devices continues to fuel the growth of connectivity

Over the last several years, interest in purchasing mobile electronic devices has risen considerably. With the introduction of new options including fitness bands, VR headsets and smartwatches, the device ownership still continues to grow.

Smartphone ownership reaches



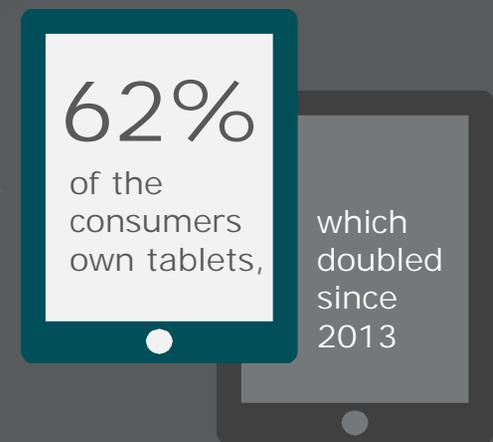
Almost a quarter of all consumers own a fitness band



of consumers own VR headsets



Smartwatch ownership increased from 4% to 13% since 2015



Device usage, again on the rise

Smartphones entered our lives approximately a decade ago.

Since then, we cannot think of our daily routines without their help.



57%

of consumers use their phones to read the news



52%

watches short videos or live posts



46%

uses maps for navigation



45%

stream and play music



31%

streaming films



and **27%**

watching live TV

Longer form video is gaining popularity with:



mPayments continue to make inroads to our daily lives

Those who said they made an in-store mobile payment with a smartphone or other device reached

29%
in 2017

Nearly
50%
increase
over 2016



Key barriers remain the concerns

About **45%** don't think it is secure enough.

42% don't see any benefits of using mPayments

Networks: The Core of Wireless



67%
uses Wi-Fi
most often

Wi-Fi remains the most commonly used form of connectivity

Most data-intensive applications are not used while connected to the mobile network

In 2017
16%
consumers stated that 4G speeds are slower compared to **11%** in 2016.



50%
Stream/play music



35%
Listen to online radio



33%
Stream films

Connecting the dots on IoT

As IoT continues to progress ultra-connected environment is becoming a reality.



Connected entertainment has the highest growth in 2017 while connected home growth is relatively weak



All individual categories of car and wearables IoT have improved in 2017. Those not finding value in connected car functions has decreased from **32%** to **14%**



Those willing to pay less than **\$10 a month** is up across the board, particularly for connected cars





Autonomous vehicles:

Autonomous vehicles are emerging as one of the most intriguing use-cases of IoT—one in which consumers are increasingly interested.



The number of consumers who said they would never consider owning, or riding in, an autonomous vehicle has dropped significantly since 2015.

In the 2017 survey, **28%** said they would never consider riding in or owning one.



That's down from **38%** in 2015—and an increase of nearly 1/3 among those who are interested.



When it comes to demographics, **twice as many men** compared to women express an interest in riding in or owning an autonomous vehicle.

Interest also wanes significantly with age. More than half of people over age 65 say they would never consider owning or riding in such a vehicle.



That contrasts with just

13%

in the age segment 25 to 34.

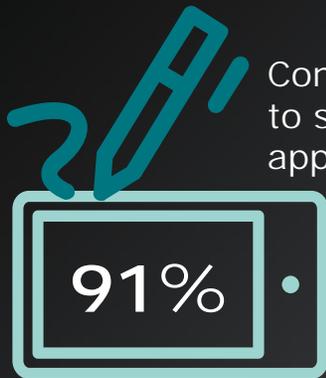
Nearly 60%

of all ages do not trust that autonomous driving technology will prevent accidents.



Consumer privacy

Consumers continue to express concerns about security and privacy, a concern captured in the data regarding the risks they perceive with IoT, mPayments, and autonomous vehicles.



Consumers have been more open to signing agreements with mobile app and service providers—

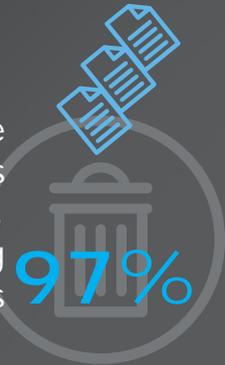
willingly accept legal terms and conditions without reading.



Only **13%**

say they never share personal information such as name, email address, phone number, photos, contact list, browsing activity, purchase history, and health metrics.

For ages 18 to 34, the rate of acceptance of terms and conditions, without reading them, reaches



78%

believe that their personal data is shared with third parties.



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