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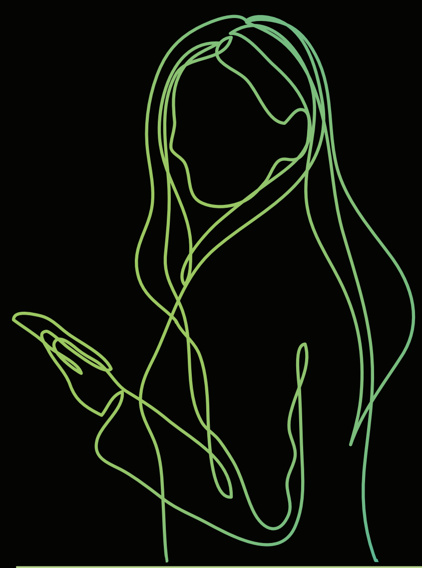
Global Mobile Consumer Survey



Consumer habits mature

A decade after the introduction of current-generation smartphones, consumers have developed preferences for how and when they use them

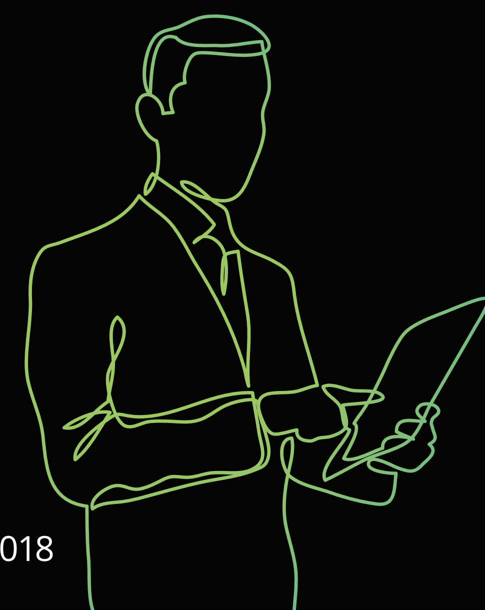
- 94% At work *vs. 92% in 2017*
- 93% Out shopping *vs. 92% in 2017*
- 88% Watching TV *vs. 89% in 2017*
- 87% Talking to family/friends *vs. 90% in 2017*
- 82% Eating in a restaurant *vs. 81% in 2017*

The percentage of consumers using mobile payments has changed very little

31% in 2018 vs. 29% in 2017

Tablets and wearables are under pressure

Attacked from multiple sides including larger screen smartphones and laptops, tablets and wearables run the risk of becoming passive or niche products



Tablet penetration

2018	57%
2017	62%
2016	59%

Tablets are not the preferred device for any of the major activities

News, Games, Music, Video

37% of consumers use voice assistants on tablets vs. 64% on smartphones

Despite enthusiasm among wearable owners, numbers remain low and growth is slow *12%* 2016 *13%* 2017 *14%* 2018

Security and data privacy

Data concerns and awareness continue to grow but have not led to significant change yet

Consumers concerned about personal data

- 86% sharing personal data with third parties
- 86% use of personal data
- 83% storing of personal data

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