

The changing face of mobile

The 2014 U.S. edition of Deloitte's Global Mobile Consumer Survey of 2,000 people across the United States offers insight into consumer purchasing habits, wants and trends, with a focus on mobile devices, services and technologies.

DEVICE OBSESSION



50% of all consumers aged 18-24 check their phones within 5 minutes of waking up

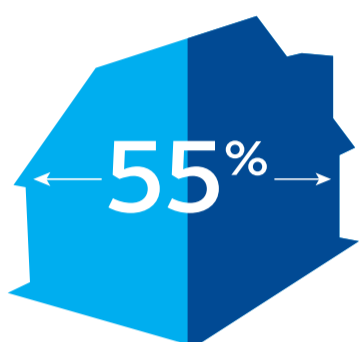
Almost **10%** of consumers check their smartphones more than 100 times a day

For all age groups, the top three morning routines include:

- ▶ **Email**
- ▶ **Texting**
- ▶ **Social Networks**

HUNGRY FOR IoT

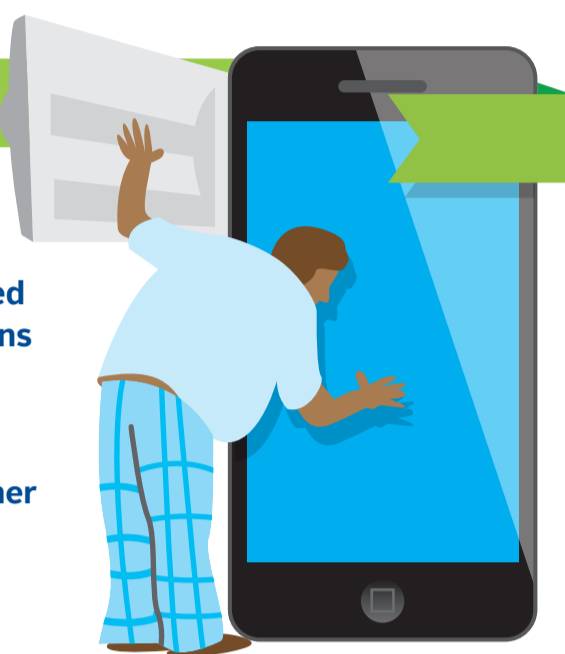
Smartphone owners overindex for both connected home and connected car.



of consumers are interested in home-based IoT

Four most desired in-car IoT solutions

- 1 **Navigation**
- 2 **Traffic/weather**
- 3 **Maintenance**
- 4 **Access**



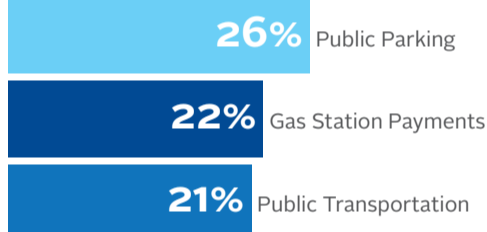
BUYING INTO mPAYMENT

Real growth opportunity exists within the mPayment landscape, as consumer interest exceeds current capabilities.

7% of consumers currently use their mobile device for in-store payments

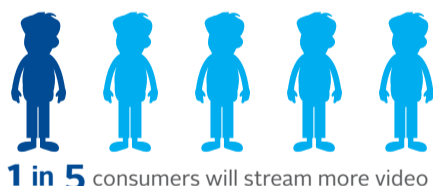
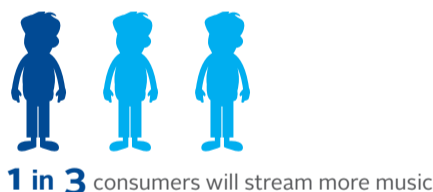
48% of consumers aged 18-24 would like to use their phones for in-store payments

People most want mPayment for:

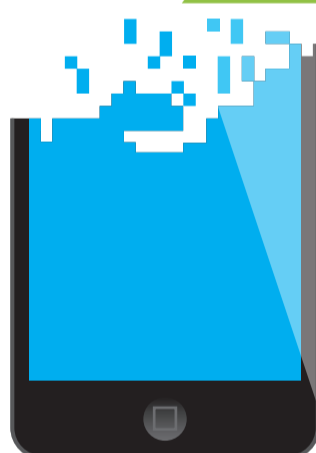
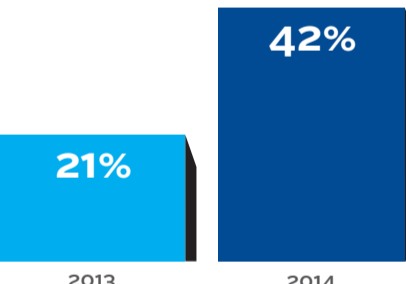


STREAM ON!

Streaming services are on the rise, with music being the leading service for growth.



Playing games on a mobile device has doubled in the last year

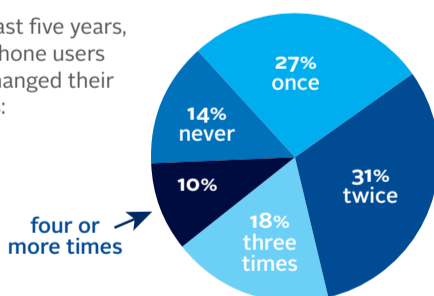


WIRELESS STABILITY

Most consumers started using a smartphone in 2012 and their appetite for new devices remains constant.

63% of smartphone users intend to maintain the same purchasing cadence in the future

In the last five years, smartphone users have changed their devices:



App downloads **down 32%**

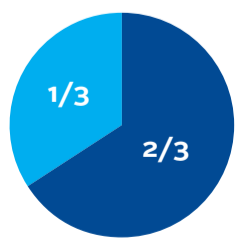
Spending per app **up 148%**



NEED FOR SPEED?

Most people are satisfied with current speeds, although younger aged users are still demanding faster connections.

71% of 4G users are satisfied



Users aged 18-44 2/3 want faster speeds 1/3 satisfied with current speed

66% of consumers say 4G speeds have improved and are now the same or faster than Wi-Fi

