Overview of results
Consumers look at their phones an average of 52 times every day.

Smartphone adoption in older generations outpaced Millennials: 7% increase in penetration for 45+ age group.

Smartphone ownership reached 85% (a YoY increase of 3 percentage points).

60% of 18- to 34-year-olds and nearly 40% of all consumers say they use their phones too much.

63% of consumers are trying to limit their usage.

Texting continues to be the top communication service, with 93% of consumers using it.
Smartphones act as a hub for myriad activities
Smartphones continue to be the preferred device to connect with others, control devices, and access information

Consumers use their smartphones to

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor fitness</td>
<td>24%</td>
</tr>
<tr>
<td>Control music on speakers</td>
<td>23%</td>
</tr>
<tr>
<td>Cast video to TV</td>
<td>19%</td>
</tr>
<tr>
<td>Control TV</td>
<td>17%</td>
</tr>
<tr>
<td>Monitor calorie intake</td>
<td>15%</td>
</tr>
</tbody>
</table>

Smartphone is the preferred device for these activities

<table>
<thead>
<tr>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>News</td>
</tr>
<tr>
<td>Watching short videos</td>
</tr>
<tr>
<td>Photos</td>
</tr>
<tr>
<td>Video calls</td>
</tr>
<tr>
<td>Social media</td>
</tr>
<tr>
<td>Banking</td>
</tr>
</tbody>
</table>
Secondhand phones
With values rising, consumer preferences are changing

More than 80% of all smartphone owners—almost 90% of 18- to 24-year-olds—purchased their current phone within the past two years.

As secondhand smartphones continue to increase in value, more are sold or kept as spares, while fewer are given away.

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kept old phone as spare</td>
<td>28%</td>
<td>34%</td>
</tr>
<tr>
<td>Gave old phone to a family member</td>
<td>20%</td>
<td>11%</td>
</tr>
</tbody>
</table>
Smartphones at work
Lines continue to blur between personal and work use

70% of working adults use their work phones outside work
84% of working adults use their personal phones during working hours

Top 5 work-related smartphone activities

- Email: 56%
- Standard calls: 52%
- Calendar management: 37%
- Maps app: 34%
- IM: 24%
Consumer habits are maturing
A decade after the introduction of current-generation smartphones, consumers have developed preferences for how and when they use them

<table>
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<th>Activity</th>
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<tr>
<td>At work</td>
<td>92%</td>
<td>94%</td>
</tr>
<tr>
<td>Out shopping</td>
<td>92%</td>
<td>93%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>89%</td>
<td>88%</td>
</tr>
<tr>
<td>Talking to family/friends</td>
<td>90%</td>
<td>87%</td>
</tr>
<tr>
<td>Eating in a restaurant</td>
<td>81%</td>
<td>82%</td>
</tr>
</tbody>
</table>
Mobile payments use has stabilized
Consumers appear to have developed habits for mobile payments with their smartphone

31% Use smartphone for mobile payments
vs. 29% in 2017

Top two reasons for not using mobile payments

42% Security
vs. 43% in 2017

42% Lack of clear benefits
vs. 41% in 2017
Tables and wearables are under pressure
Tablets recorded the largest YoY decline; smartphones were the only device to show consistent growth over the past 5 years.

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

Tablets are not the preferred device for any of the major activities:
- News
- Music
- Games
- Video
Tablets and wearables are under pressure

Wearables run the risk of topping out as a niche product: Growth is slow, despite enthusiasm among consumers who own wearables.
Security and data privacy remain open issues

Data concern and risk awareness continue to grow but have not driven 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

85% believe companies use their personal data
80% believe companies share their personal data
Voice assistants speak up
Smartphone voice assistants continue to gain momentum

Nearly $\frac{2}{3}$ of consumers use their smartphone voice assistant, a YoY increase of 11 percentage points

- 53% used voice assistants in 2017
- 64% used voice assistants in 2018
- 69% of consumers who own voice-assisted speakers use them weekly

Voice-assisted speakers have already penetrated more than 20% of the market
Data on the rise
Consumers rely on mobile data for a variety of applications—and speed is critical

Unlimited plans are gaining subscribers
- 25% in 2017 → 37% in 2018

5G has grown in importance
- 55% in 2017 → 60% in 2018

More than 80% of people who watch video regularly on a smartphone rate 5G important

69% of those with unlimited plans rate 5G important
IoT waiting to connect
Despite widespread penetration of connected devices, results are mixed on willingness to pay and interest in advanced features

85% interested in connected car
73% interested in connected home
65% interested in connected self/wearables

Top 5 connected devices used on a daily basis among owners

- **81%** Smart TV
- **67%** Smart camera
- **63%** Smart lighting
- **71%** DVR
- **64%** Smart thermostat
IoT waiting to connect: In the home

Most consumers are interested in the connected home but willingness to pay has plateaued.

Connected-home features consumers value:
- Home control: 55%
- Home monitoring: 53%
- Appliance control: 28%
- Entertainment: 27%
- Landscape control: 19%

Willingness to pay for any form of connected home has plateaued:
- Home monitoring: 54%
- Home control: 49%
- Landscape control: 37%
- Appliance control: 36%
- Entertainment: 35%
IoT waiting to connect: In the car

The large majority of consumers are interested in the connected car but willingness to pay has declined.

Connected-car features consumers value

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<tr>
<th>Feature</th>
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<th>2018</th>
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<tbody>
<tr>
<td>Route tracking</td>
<td>45%</td>
<td>47%</td>
</tr>
<tr>
<td>Maintenance</td>
<td>43%</td>
<td>46%</td>
</tr>
<tr>
<td>Traffic/weather</td>
<td>43%</td>
<td>44%</td>
</tr>
<tr>
<td>Access</td>
<td>27%</td>
<td>45%</td>
</tr>
<tr>
<td>Fuel efficiency</td>
<td>22%</td>
<td>41%</td>
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Willingness to pay

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2017 data compared to 2018 data.
A reality check for autonomous cars
After many years of increase, consumer interest in self-driving cars decreased

**Intent to buy, ride in, rent, or hire an autonomous vehicle decreased significantly**

- **6%** Buy an autonomous car
- **8%** Ride in someone else’s autonomous car
- **9%** Rent an autonomous car
- **6%** Hire an autonomous car
- **8%** Ride in an autonomous public transit vehicle

**More than 1/3** would never consider riding or owning an autonomous car

- **65%** think people won’t trust the technology to prevent accidents
- **42%** think people won’t trust the car to give them manual control if needed
About the survey

This Global Mobile Consumer Survey covers 6 continents, 35 countries, and more than 54,000 respondents. The insights in this particular report are extracted and analyzed from data gathered from approximately 2,000 survey respondents within the United States. 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 year-over-year results and key insights, the survey is also designed to highlight differences among consumers across generational divides—capturing findings from six distinct age groups, ranging from ages 18 to 75.
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