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Global Mobile Consumer Survey, US Edition

Overview of results

Smartphones front and center

Mobile phones are still on the rise, in number and importance

Smartphone ownership reached *85%*

(a YoY increase of 3 percentage points)

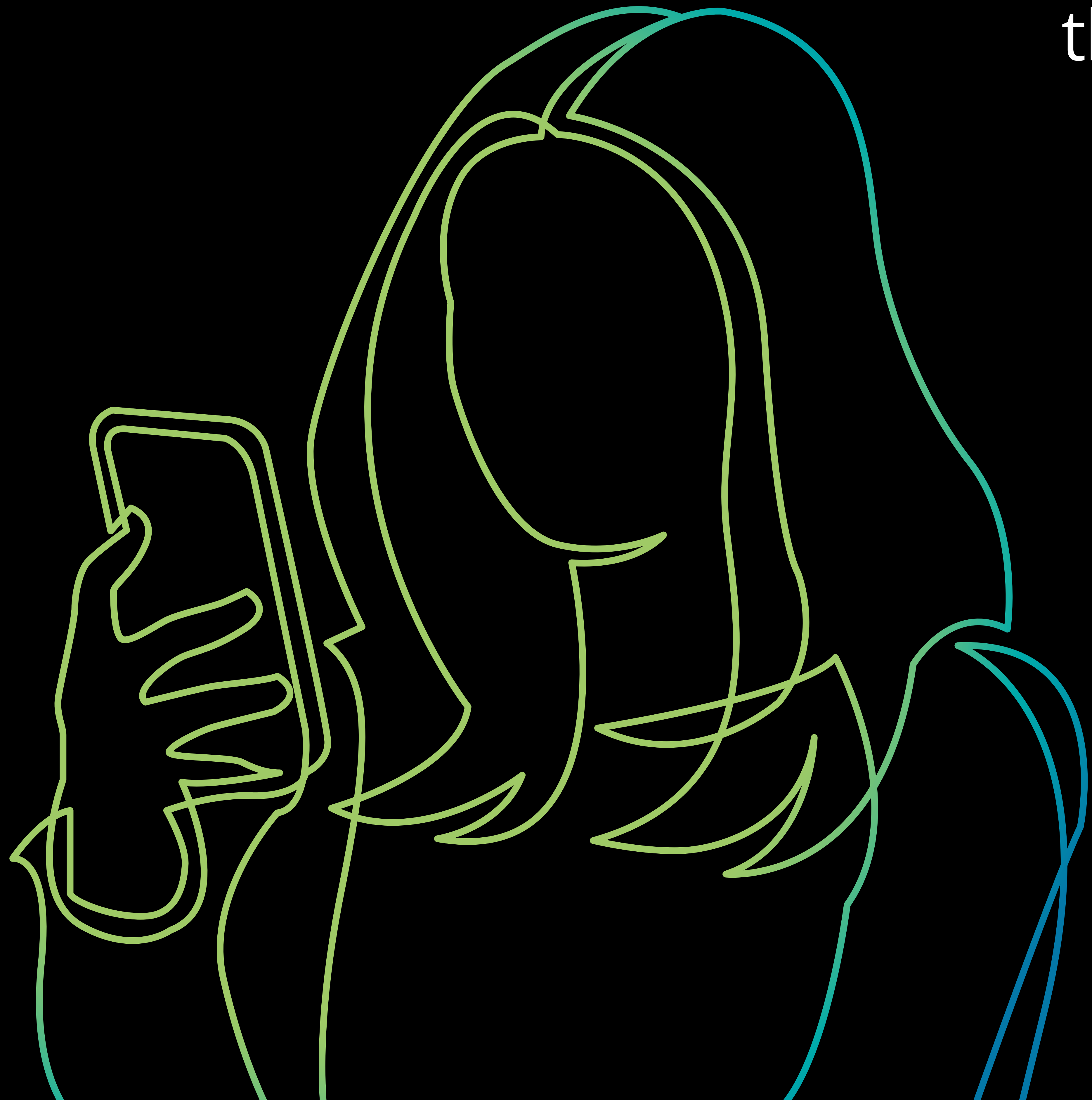
Consumers look at their phones an average of

52 times every day

Smartphone adoption in older generations outpaced Millennials:

7% increase

in penetration for 45+ age group



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

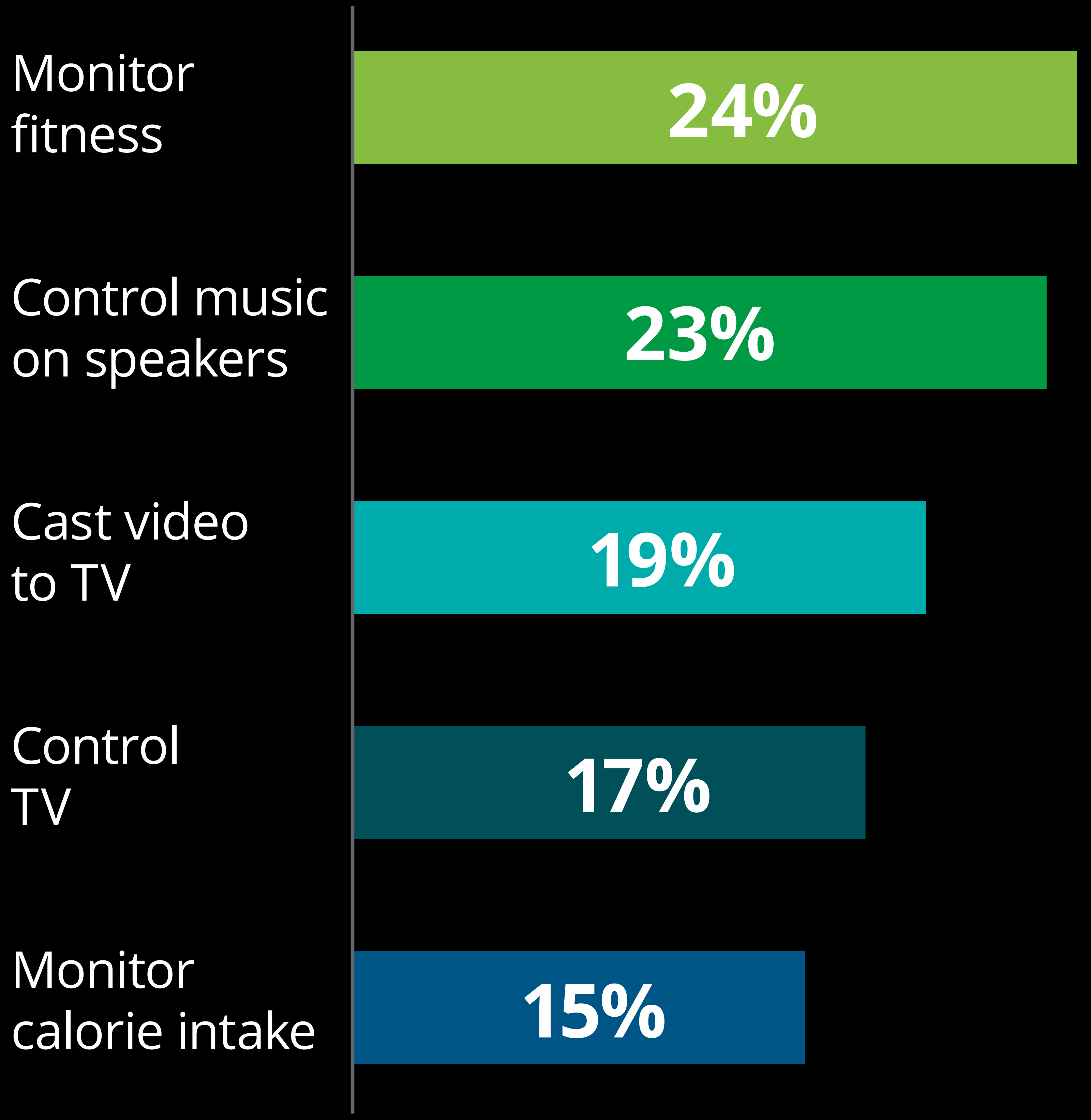
63% of consumers are trying to limit their usage

Texting continues to be the top communication service, with *93%* of consumers using it

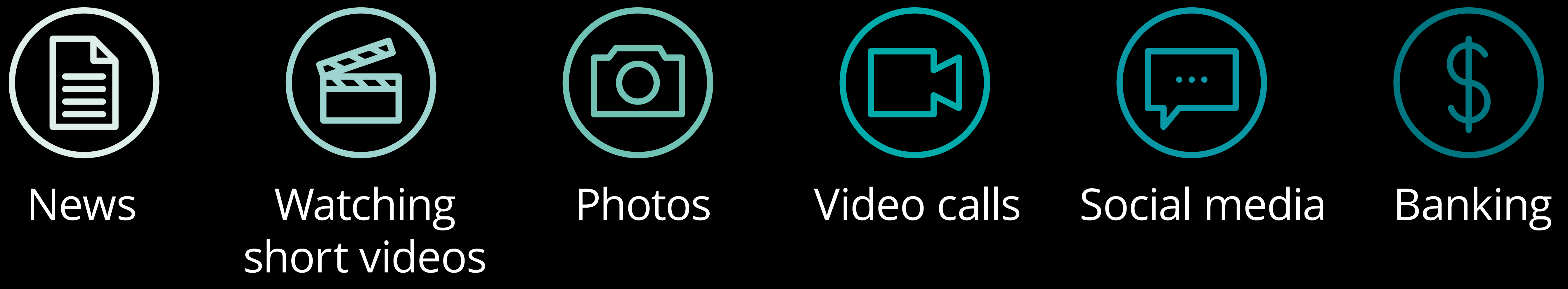
Smartphones act as a hub for myriad activities

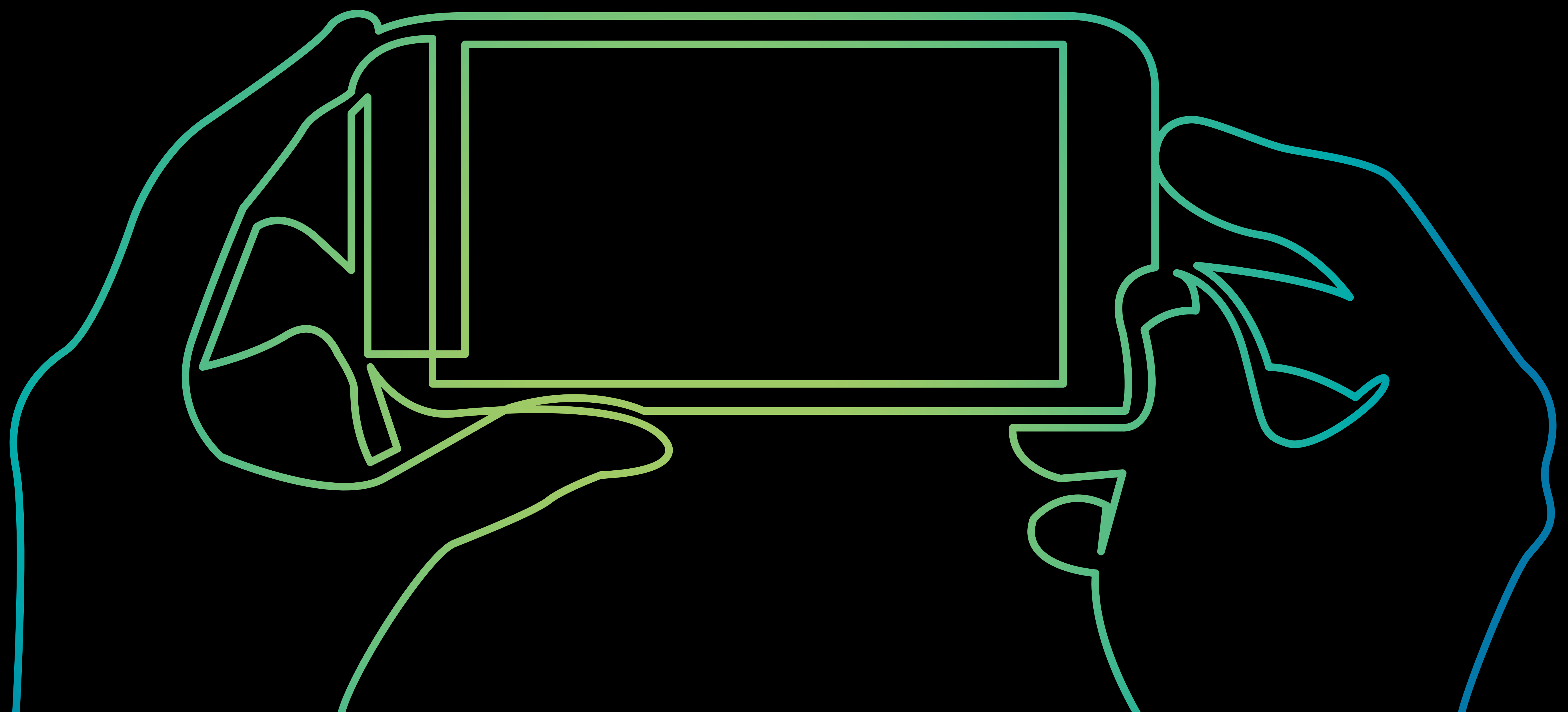
Smartphones continue to be the preferred device to connect with others, control devices, and access information

Consumers use their smartphones to



Smartphone is the preferred device for these activities

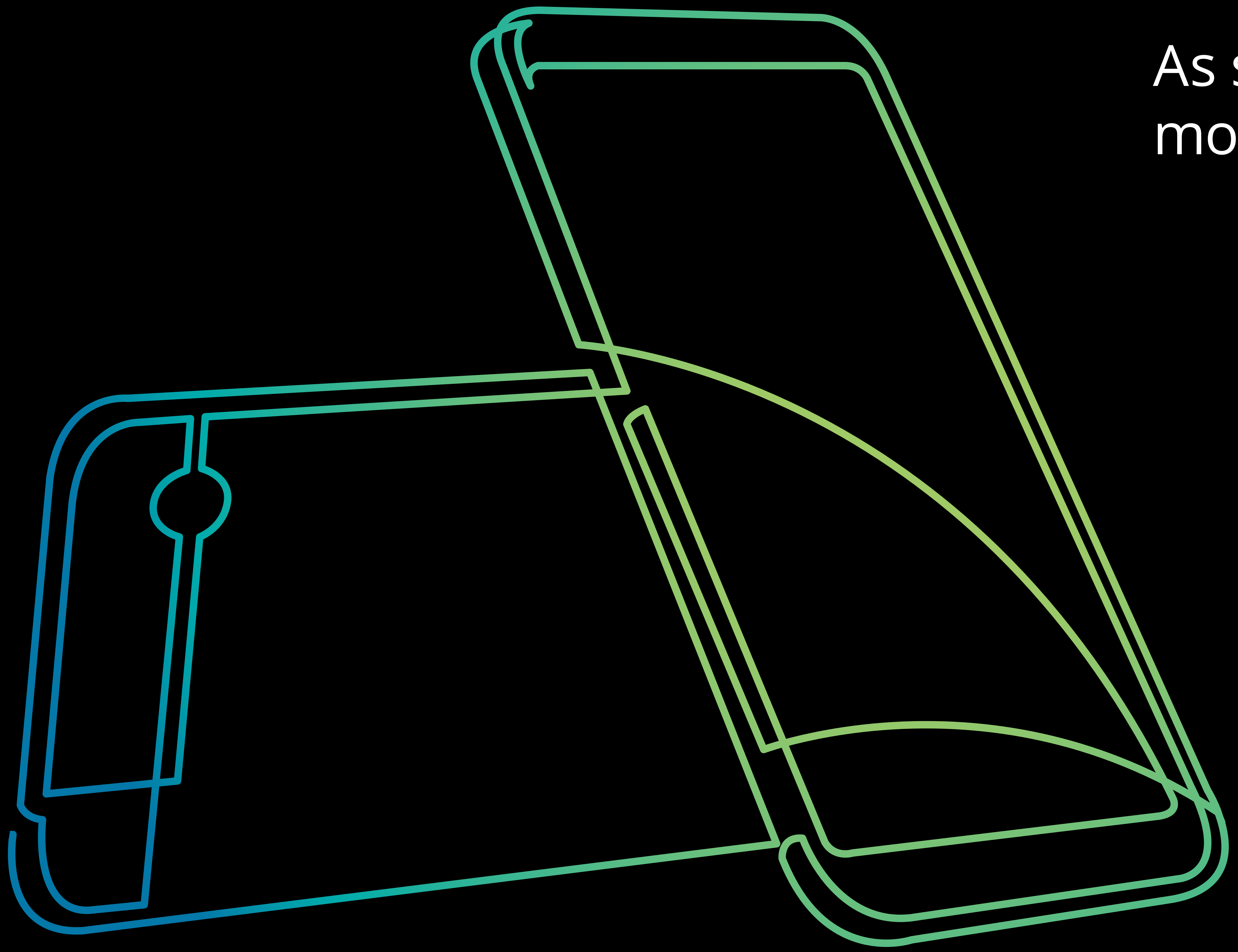




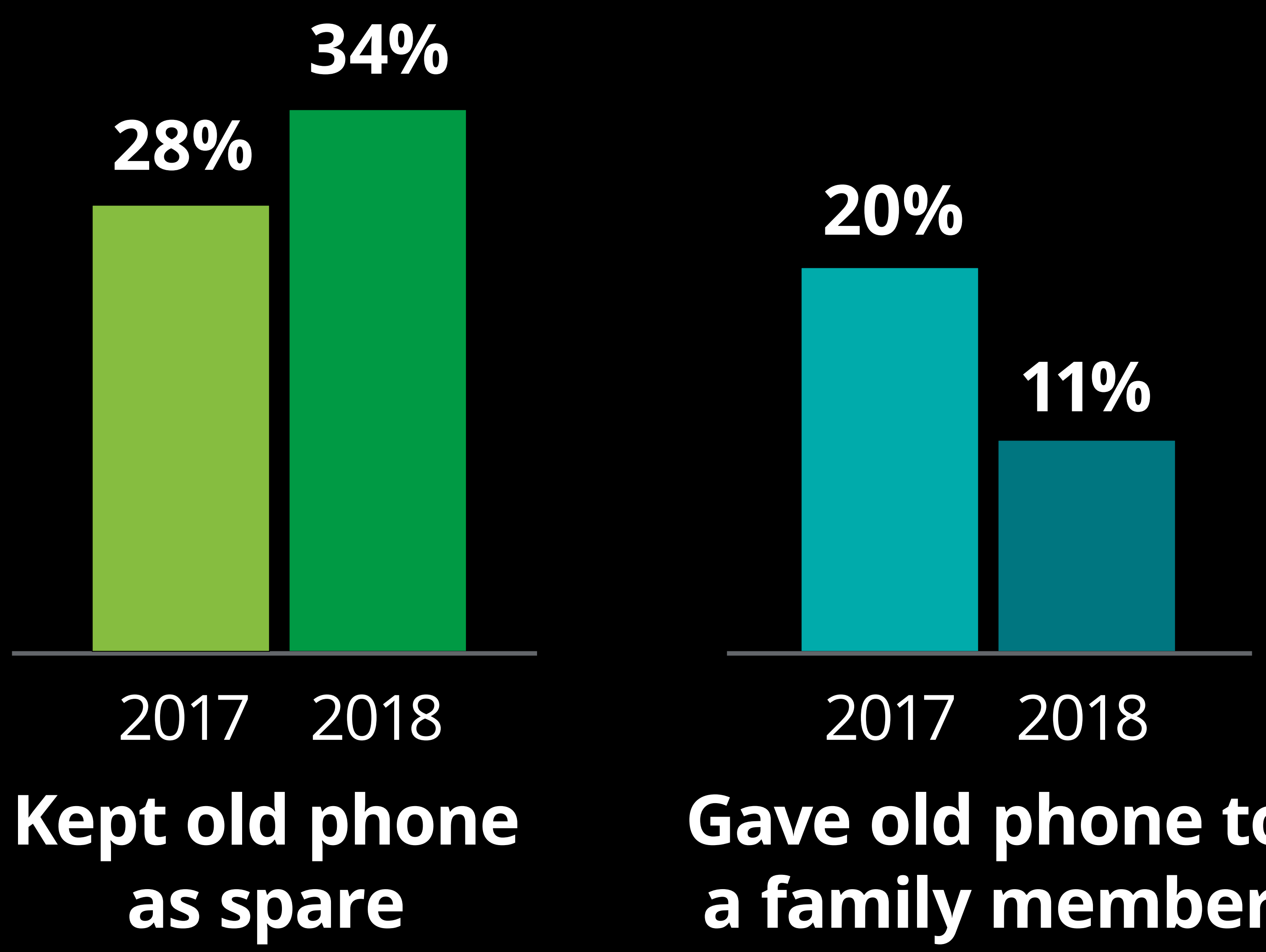
Secondhand phones

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



Smartphones at work

Lines continue to blur between personal and work use

70% of working adults use their work phones outside work

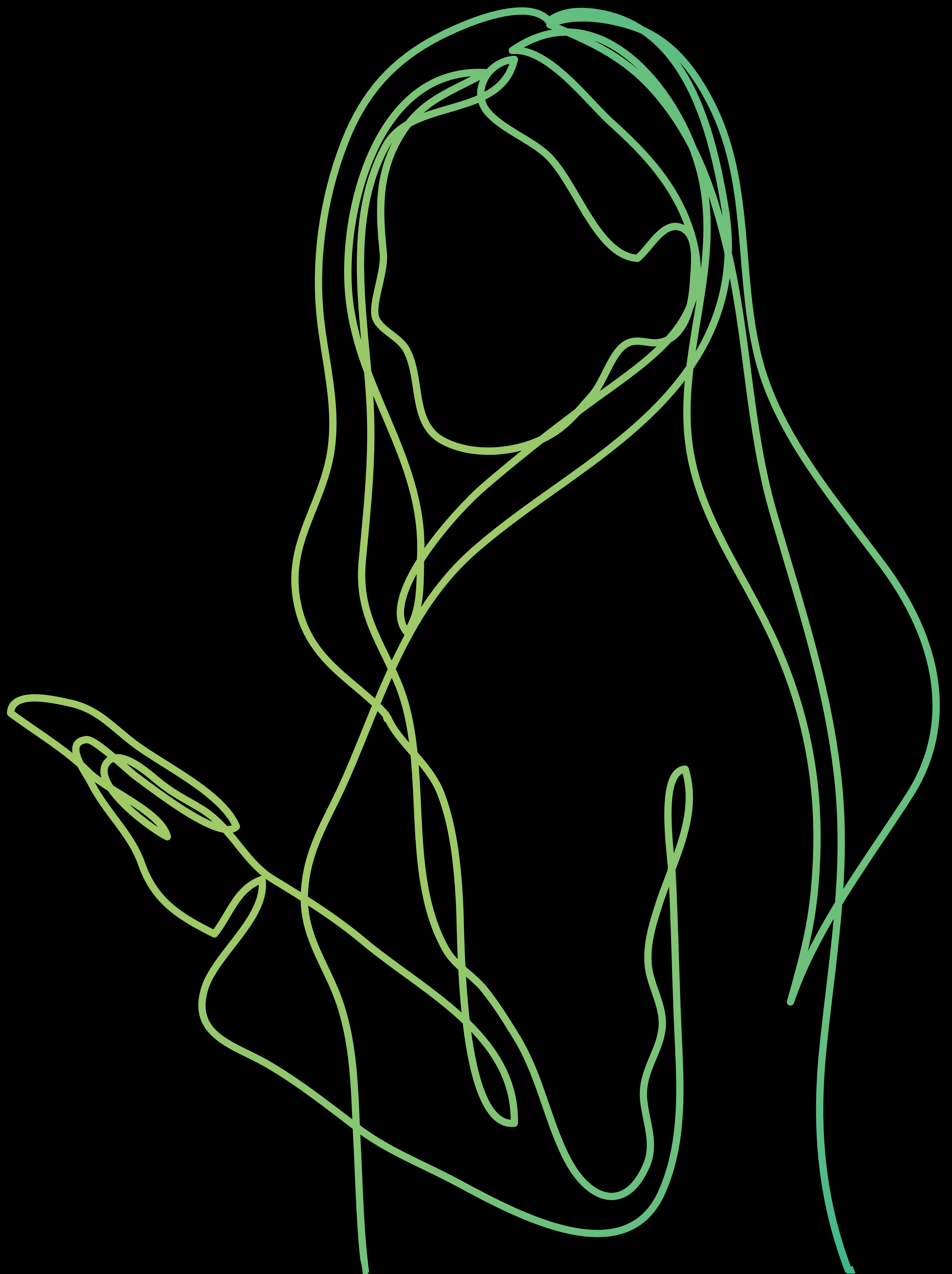
84% of working adults use their personal phones during working hours

Top 5 work-related smartphone activities

Consumer habits are maturing

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

	At work	Out shopping	Watching TV	Talking to family/friends	Eating in a restaurant
2018	94%	93%	88%	87%	82%
2017	92%	92%	89%	90%	81%



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

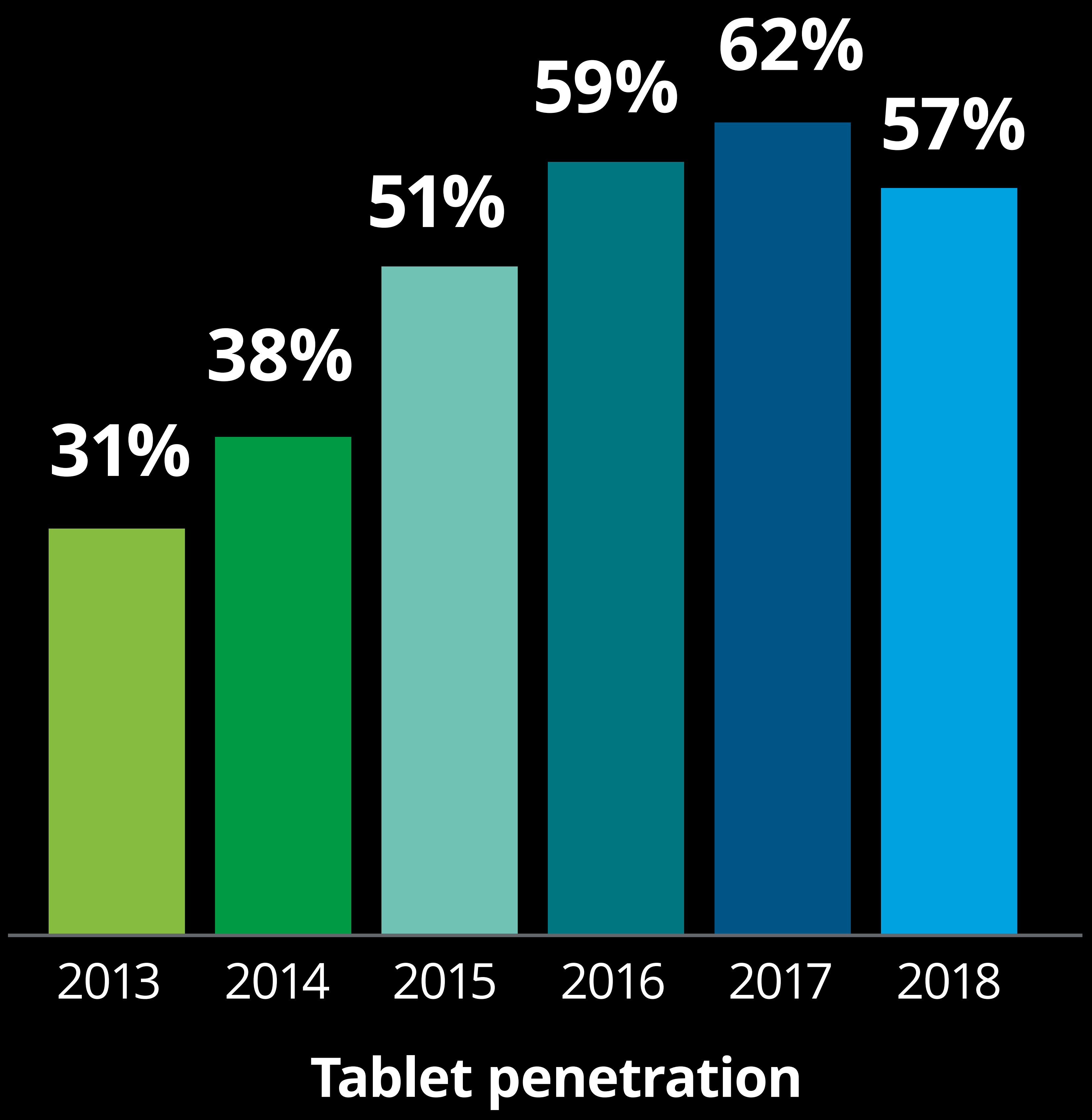
42%

Lack of clear benefits

vs. 41% in 2017

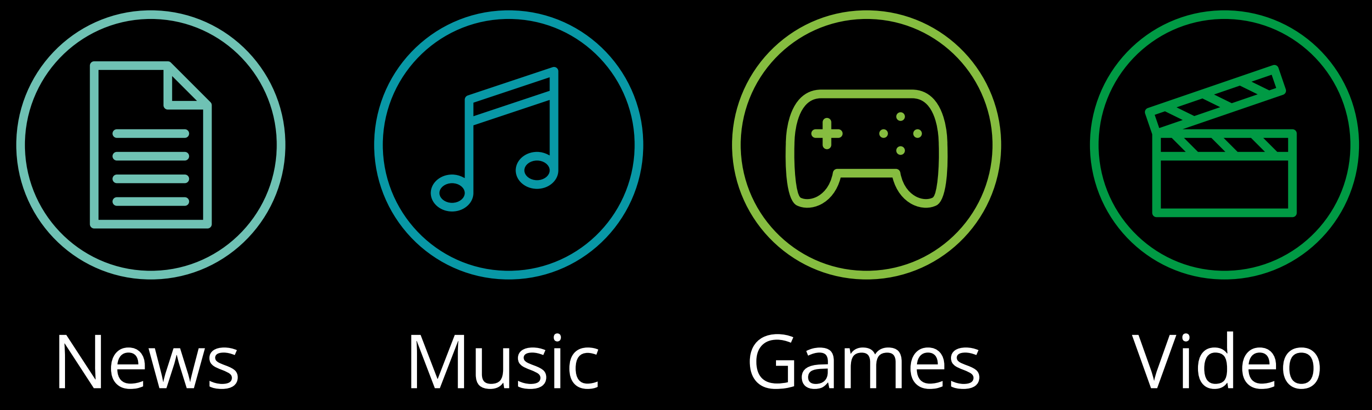
Tablets and wearables are under pressure

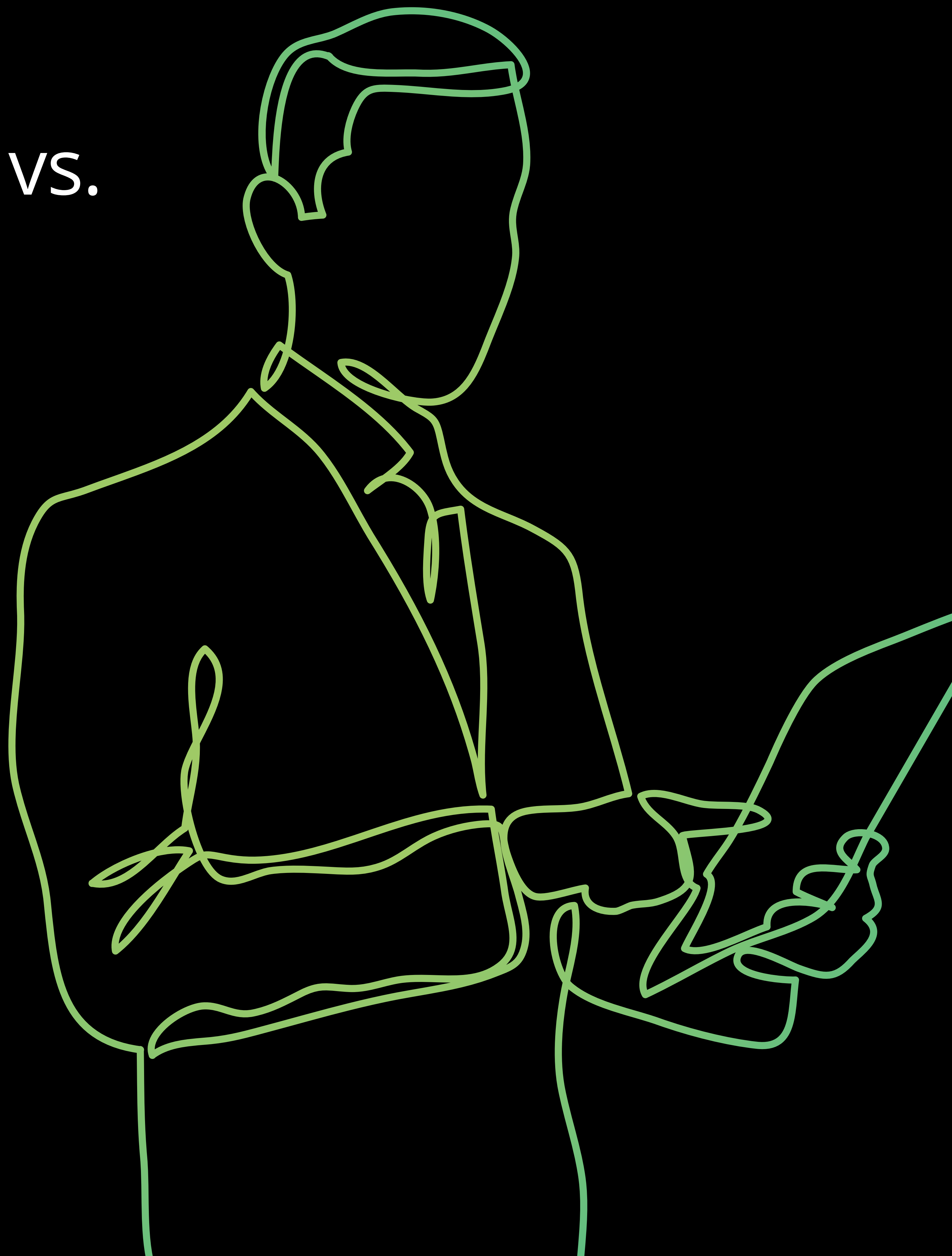
Tablets recorded the largest YoY decline; smartphones were the only device to show consistent growth over the past 5 years



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

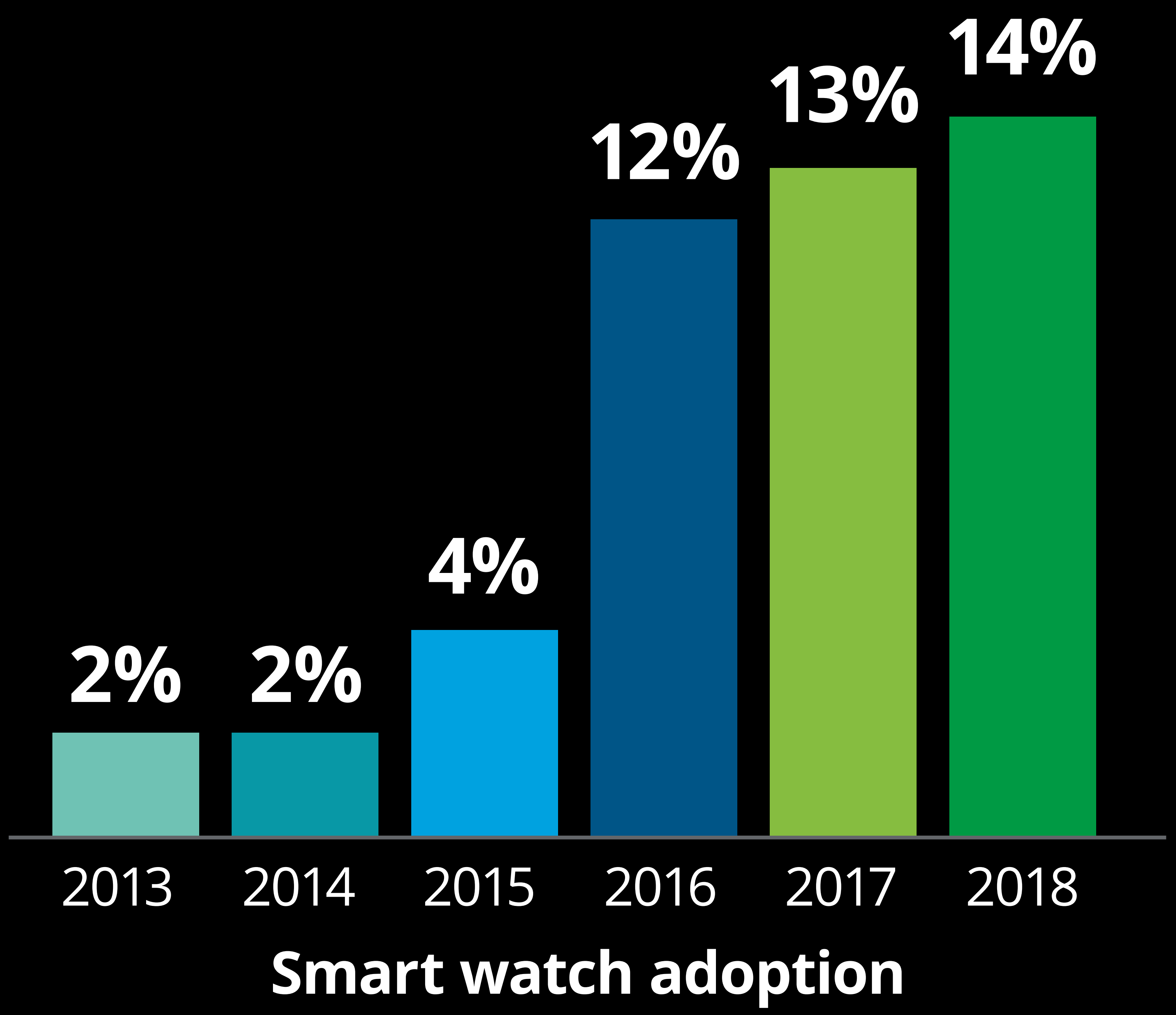
Tablets are not the preferred device for any of the major activities



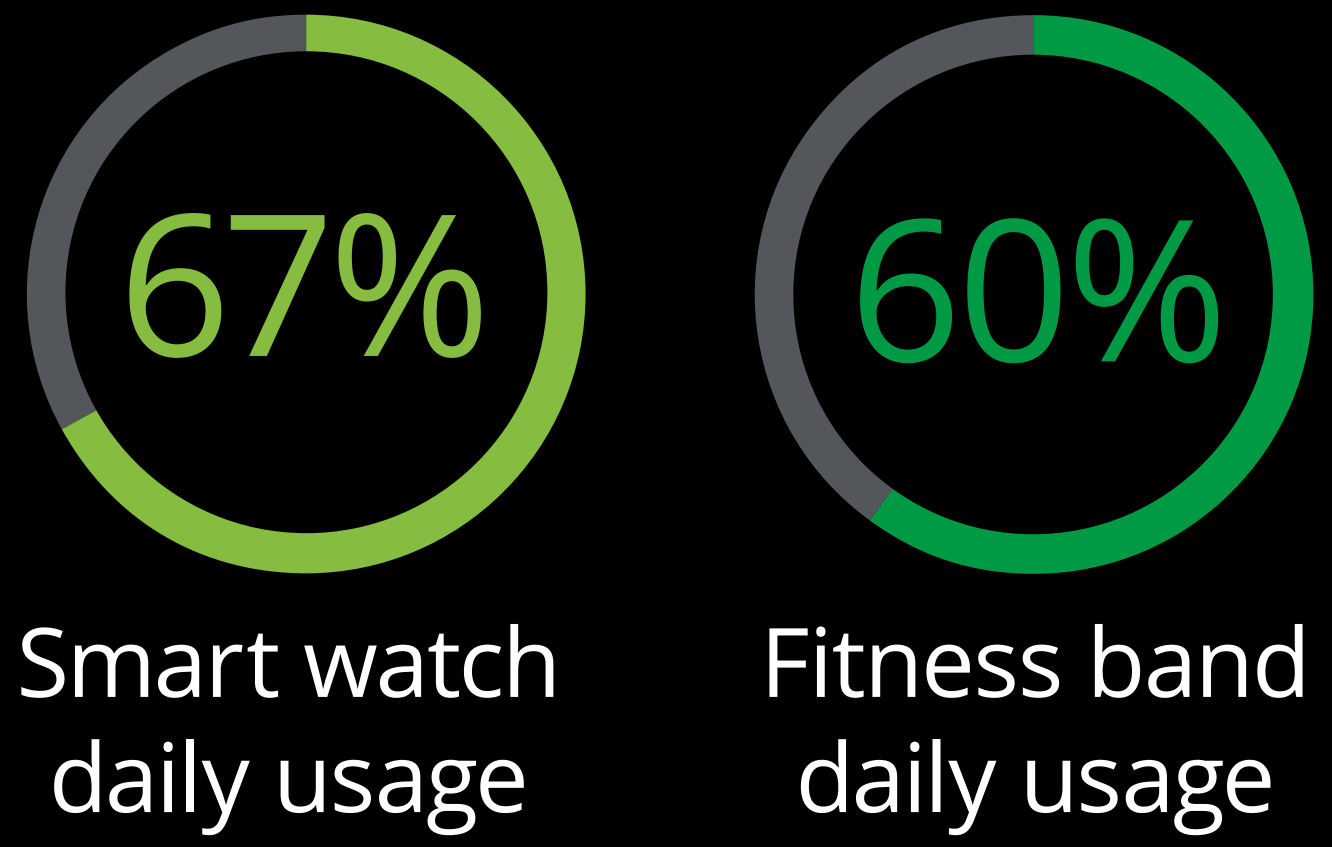


Tablets and wearables are under pressure

Wearables run the risk of topping out as a niche product: Growth is slow, despite enthusiasm among consumers who own wearables

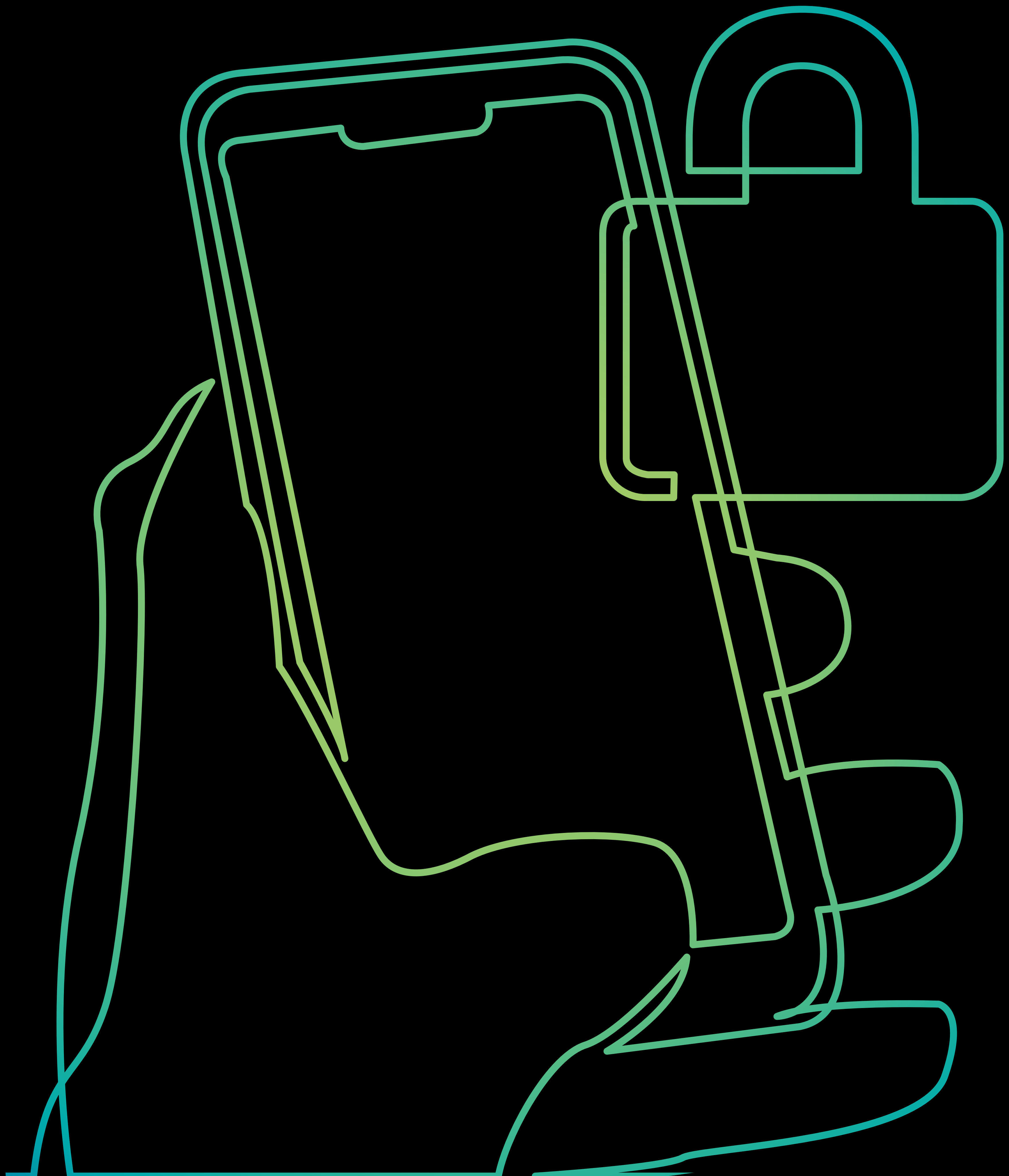


Daily use is strong for those who own wearables



Security and data privacy remain open issues

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

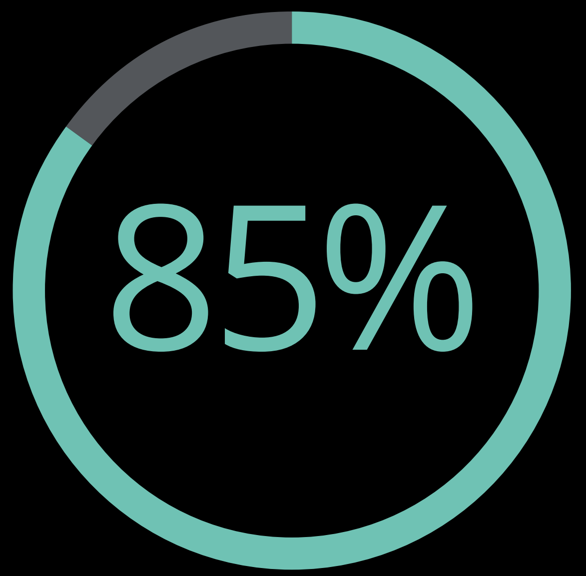


Consumers concerned about personal data

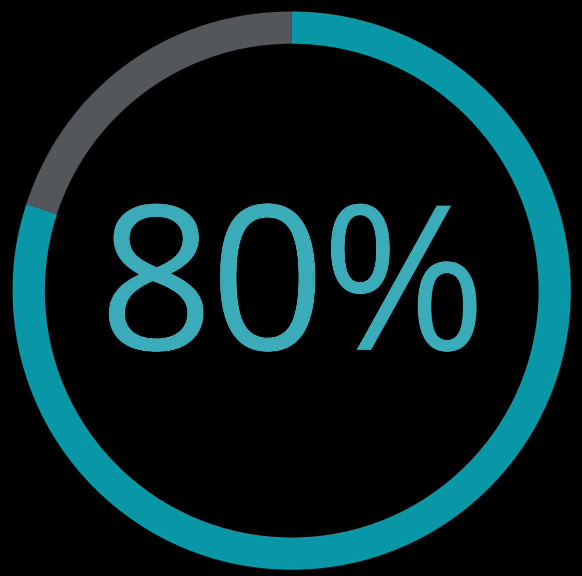
86% sharing personal data with third parties

86% use of personal data

83% storing of personal data



believe companies use their personal data

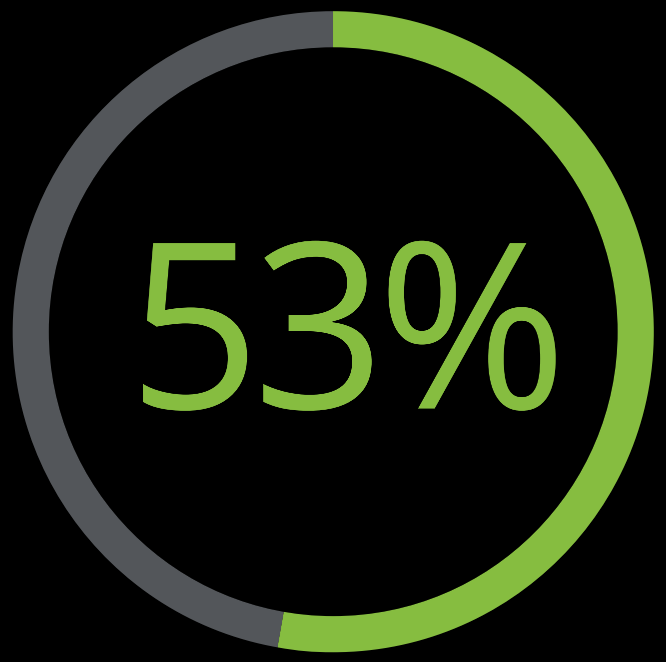


believe companies share their personal data

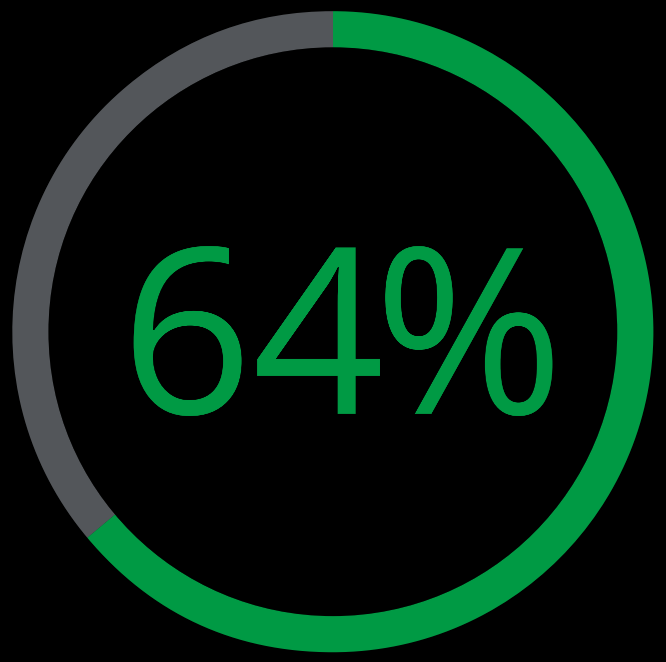
Voice assistants speak up

Smartphone voice assistants continue to gain momentum

Nearly 2/3 of consumers use their smartphone voice assistant, a YoY increase of 11 percentage points



used voice assistants in 2017



used voice assistants in 2018

46% of this group used voice assistants on a weekly basis

Voice-assisted speakers have already penetrated more than 20% of the market

69% of consumers who own voice-assisted speakers use them weekly

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

69%

of those with unlimited plans rate 5G important

More than 80% of people who watch video regularly on a smartphone 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

55% Home control

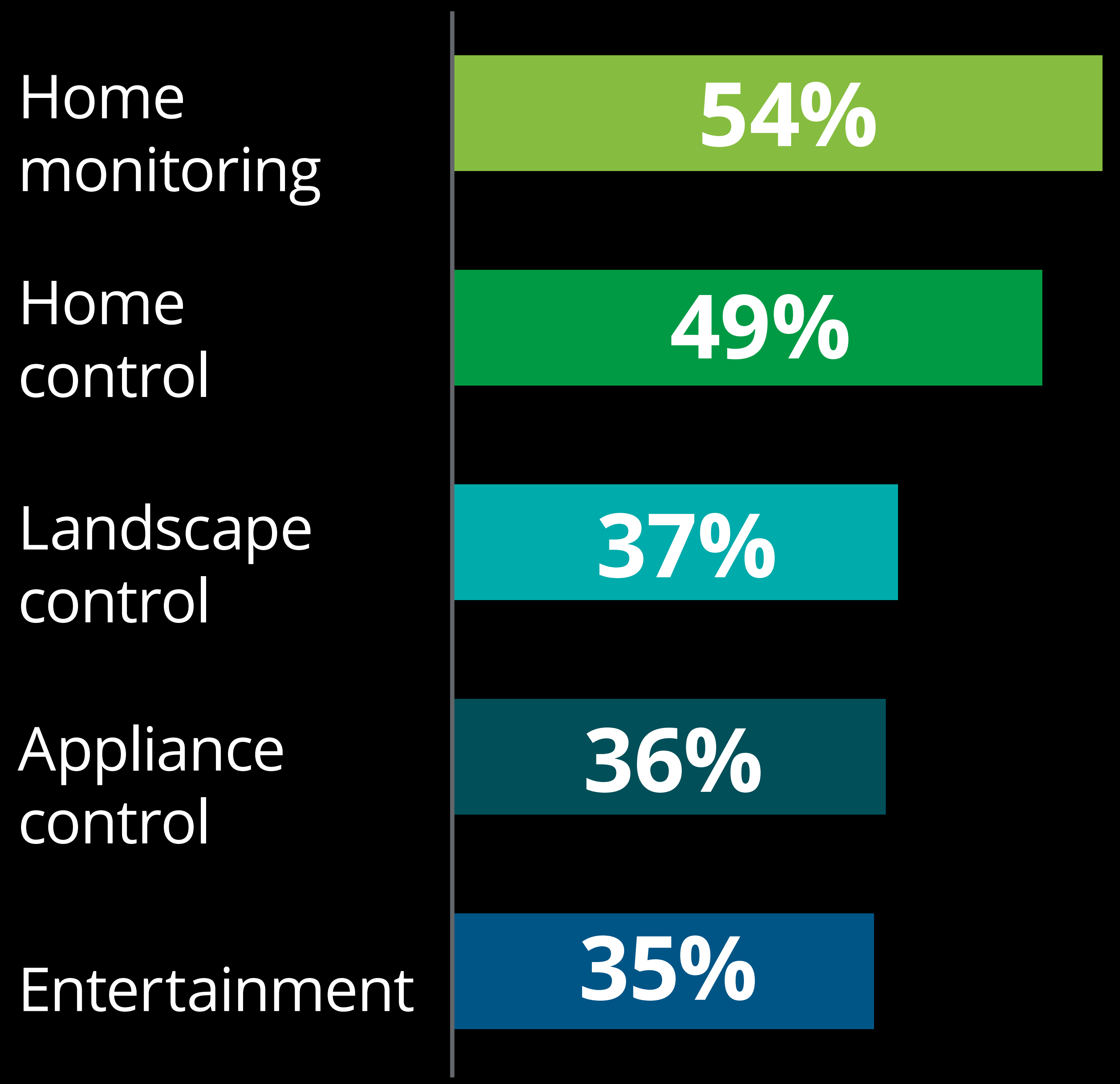
27% Entertainment

53% Home monitoring

19% Landscape control

28% Appliance control

Willingness to pay for any form of connected home has plateaued



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

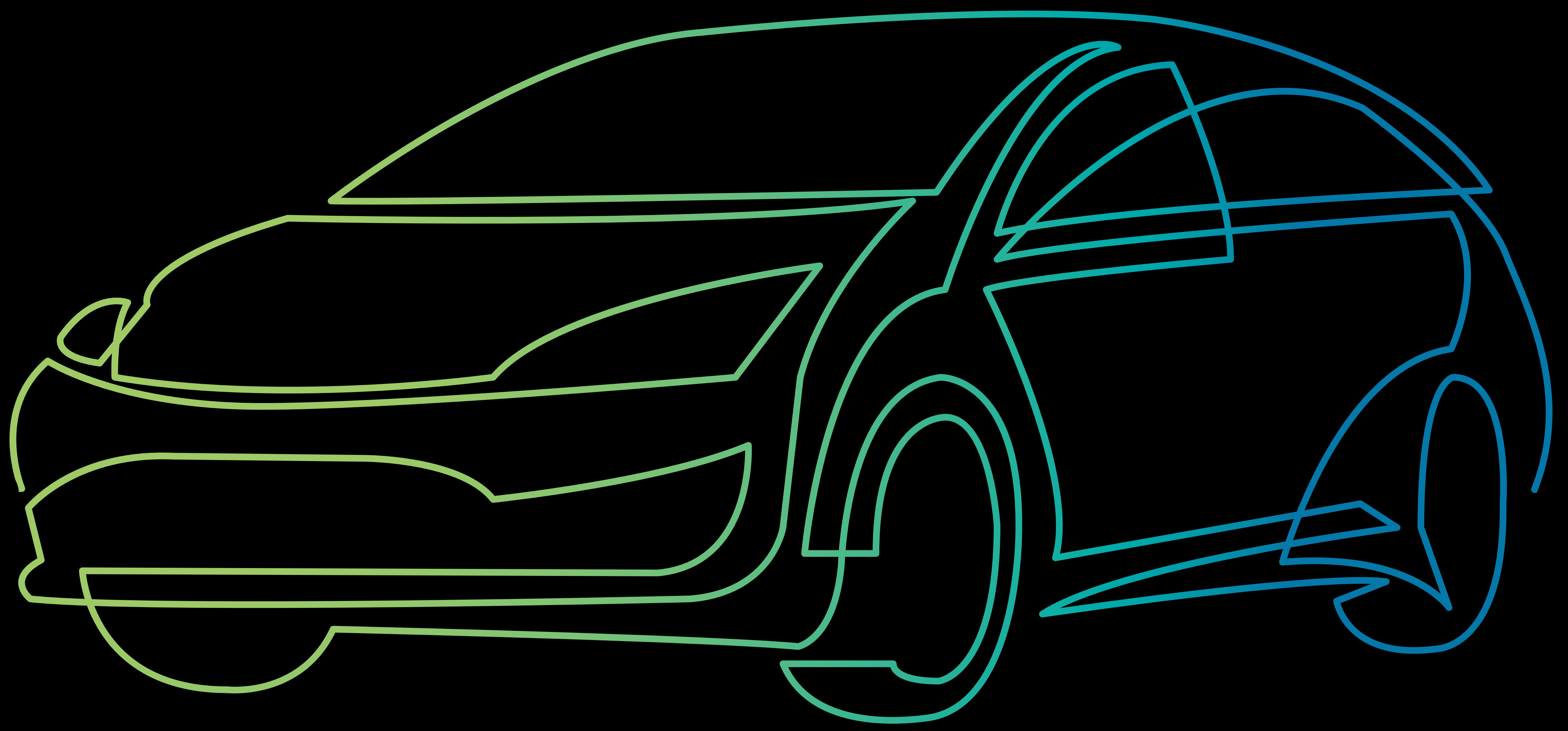
45% Route tracking

43% Maintenance

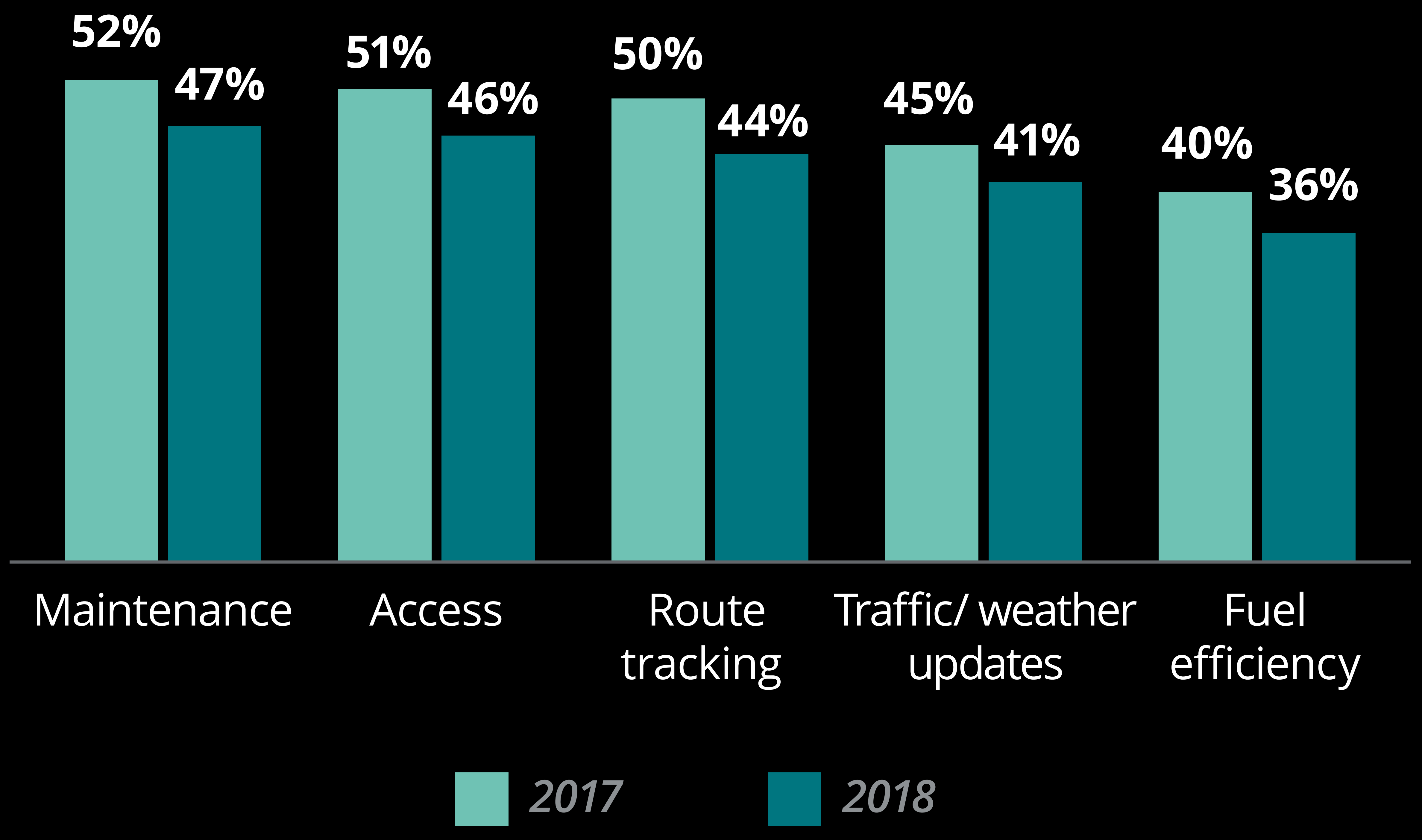
43% Traffic/ weather

27% Access

22% Fuel efficiency



Willingness to pay



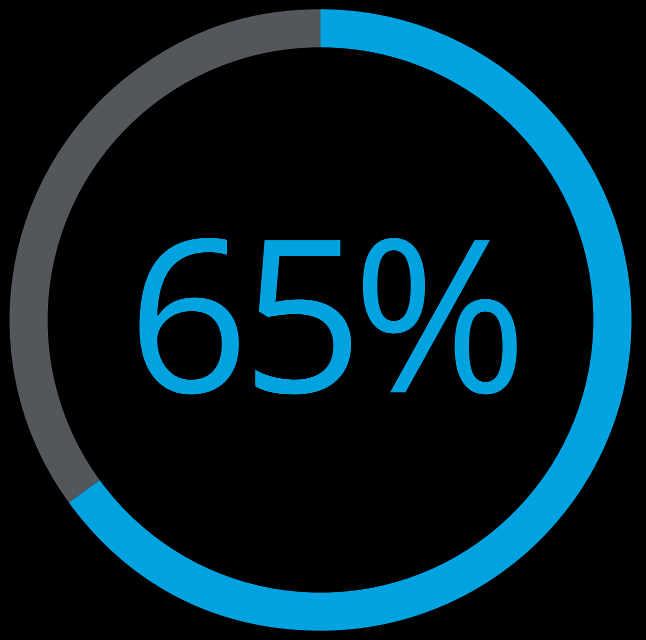
A reality check for autonomous cars

After many years of increase, consumer interest in self-driving cars decreased

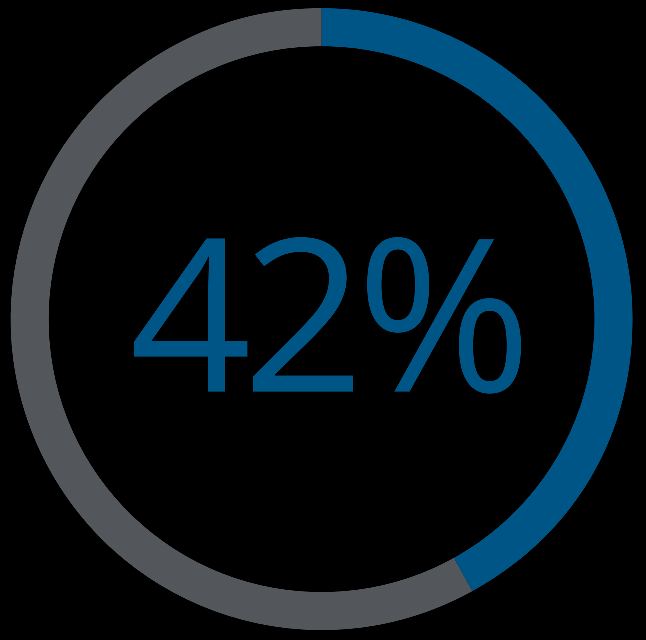
Intent to buy, ride in, rent, or hire an autonomous vehicle decreased significantly

- ↓ 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

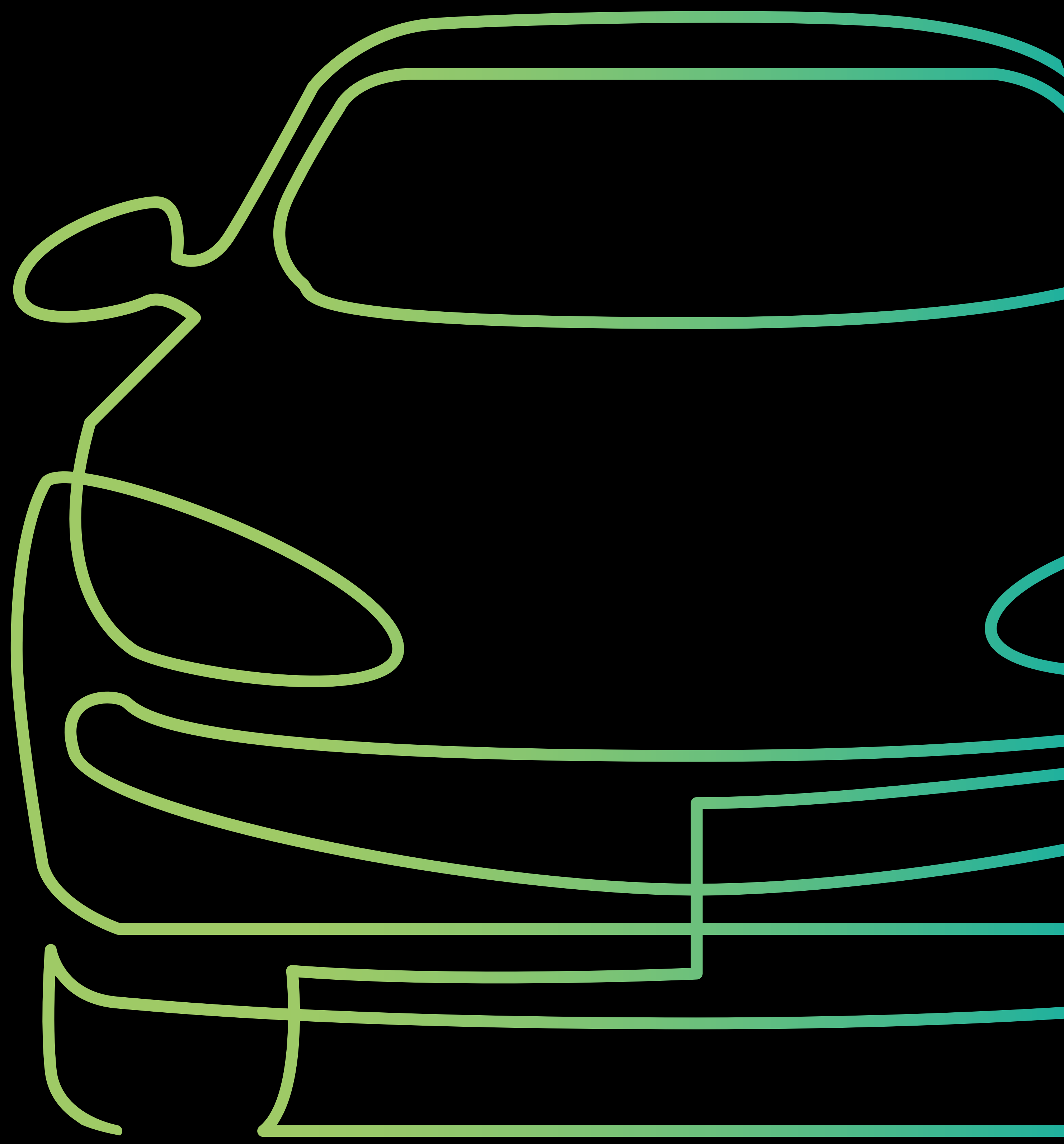
More than 1/3 would never consider riding or owning an autonomous car



think people won't trust the technology to prevent accidents



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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