



# Global Mobile Consumer Survey

U.S. Edition  
October 2013



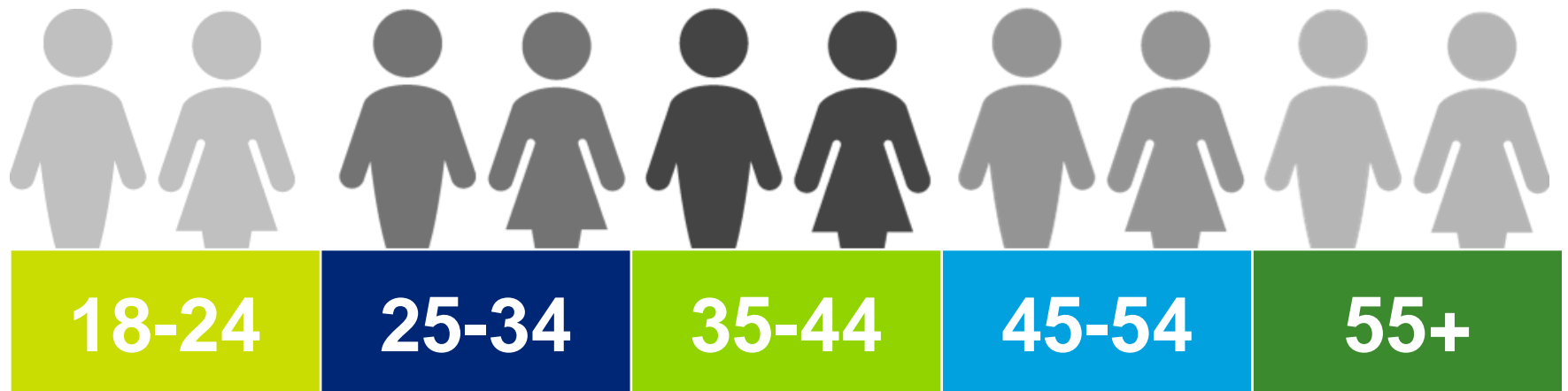
# The 2013 Global Mobile Consumer Survey:

**37,600** responses, **20** countries, **four** continents



# About the Global Mobile Consumer Survey and U.S. data

- The survey was commissioned by Deloitte’s global Technology, Media and Telecommunications (TMT) practice. It is based on an online survey of consumers across 20 countries. The survey was fielded by an independent research firm between May-July 2013 and yielded 37,600 responses globally.
- This Global Mobile Consumer Survey presentation highlights findings from the United States survey results. In the U.S., the survey yielded 2,000 respondents. This presentation offers insight into consumer purchasing habits, wants and trends in the U.S., with a focus on mobile devices and services. The survey includes five age groups:



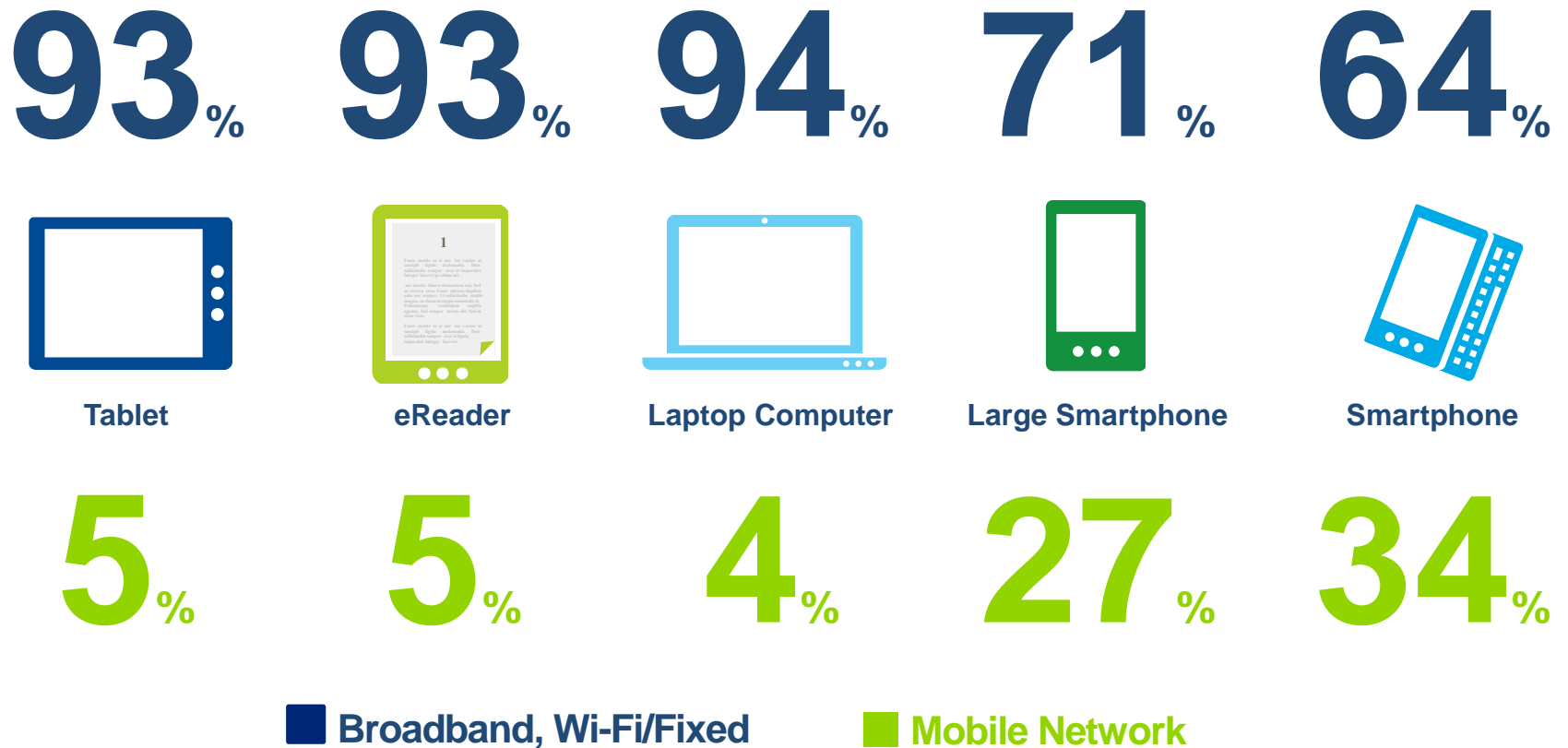
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# About the Global Mobile Consumer Survey and U.S. data

- Survey responses for all countries, including the U.S., are weighted to the U.S. population (2011 U.S. census data).
- The survey is now in its third year and includes selected trending data for 2012 and 2013. When relevant, we have included trending data to show changes in consumer behavior and opinions.
- Globally, the question set for this survey was standard, except where information about the local market was specifically requested. For example, in the United States, we asked additional questions about BYOD (Bring Your Own Device) trends. U.S. questions were asked in English. Questions pertaining to spend were all asked in local currency.

# Wi-Fi is the predominant Internet connection across portable devices in the U.S.

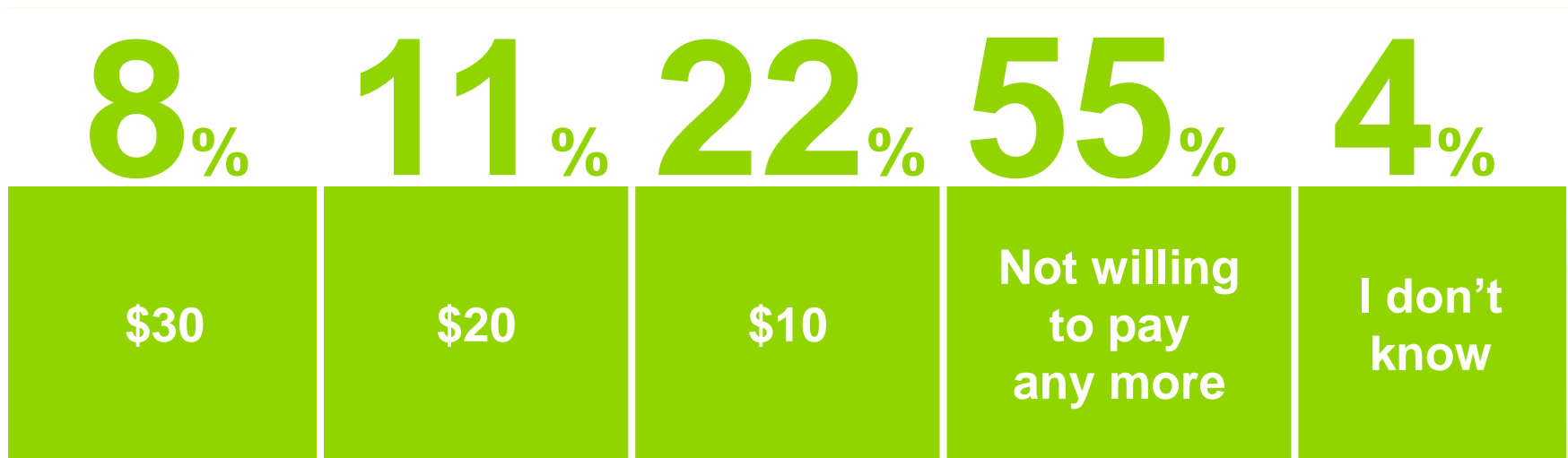
Thinking about how you connect your devices to the Internet, which type of connectivity do you use most often?



**Base:** Total respondents that connect to the internet using their portable devices ,1,921; Tablet 519; eReader 130; Laptop Computer 1231; Large Smartphone 55; Smartphone 826

# 41% of subscribers would be willing to pay more for substantively faster wireless speeds

How much would you be willing to pay if your wireless carrier would offer you speeds between 3 to 5 times higher than your current speeds?



Base: Total respondents – All those who want faster wireless download speeds: 639

# Performance is the key driver when choosing Wi-Fi over mobile networks

For which of the following reasons do you use Wi-Fi to connect to the Internet instead of your mobile carrier's network (2G, 3G or 4G/LTE)?

All figures in %

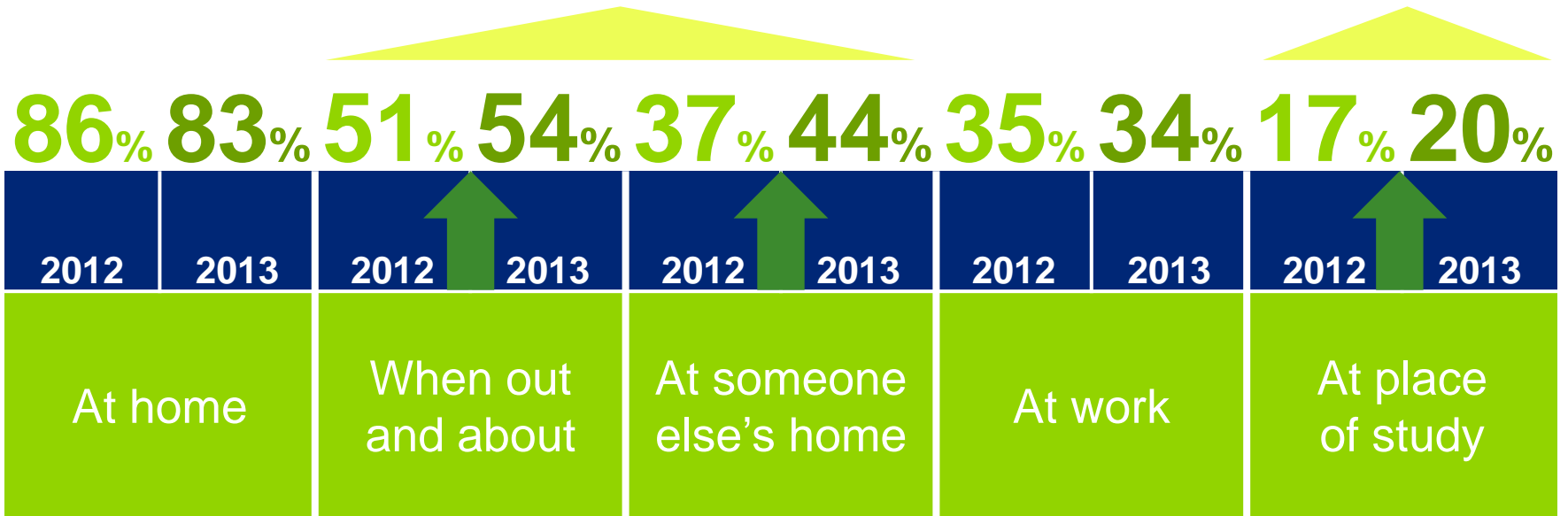
Criteria / Reasons		Subscribe to 4G/LTE	Do not subscribe to 4G/LTE
1	Faster speeds	49	38
	Faster response time (e.g., when browsing)	38	36
2	To save money on my mobile phone bill	36	37
	To save on my monthly internet allowance from my mobile carrier	38	33
	A more reliable connection	36	31
	It uses less battery	23	22
	Poor or lack of 3G/4G coverage in general	21	18

Base: Total respondents who connect to Wi-Fi on their mobile 747, Respondents that subscribe to 4G 331, Respondents that do not subscribe to 4G 416

# Use of Wi-Fi is increasing outside out of home and work use

In which of the following Wi-Fi enabled places do you use your phone to connect to Wi-Fi?

*The findings imply that the use of Wi-Fi at home and at work is being **augmented by use in more social settings**, creating new dynamics and potential interactions among consumers.*



Base: Total respondents using Wi-Fi to connect to the internet on their mobile (2013) 747, (2012) 501



# Device cost is #1 for standard phone owners; last for smartphone owners

When choosing your current phone, which, if any, of the attributes did you consider to be most important?

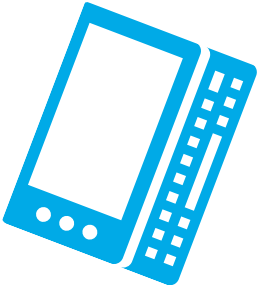
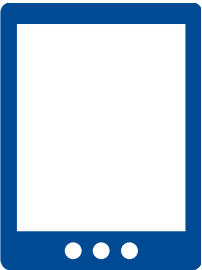
## 2013 Results – Standard Phone vs. Smartphone

Selection Criteria	Standard phone	Smartphone	All respondents
Phone size	34	40	37
Cost of monthly service plans	37	37	37
Battery life	27	40	35
Design (look and feel)	25	40	34
Device brand	18	38	30
Lower cost of device	40	20	28
Touchscreen usability/availability	7	41	27
The operating system in use	6	40	26
Camera quality and usability	11	35	25

*All figures in %*

**Base:** Total respondents who use... Any phone 1,698; Standard phone users: 698, Smartphone users: 999

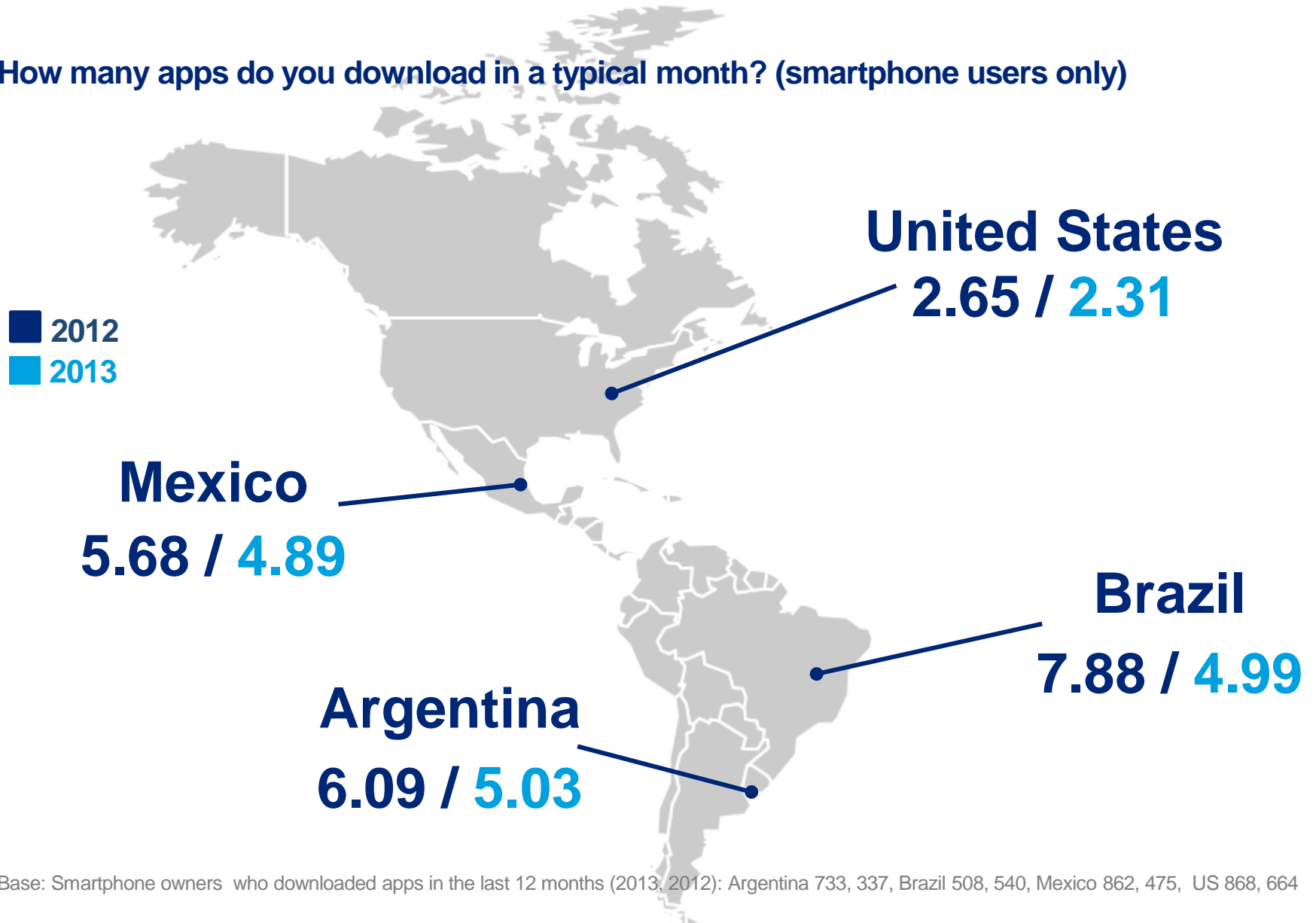
# App downloads and per-app spending has decreased year-over-year, with the biggest reduction in tablets

Device	Year	How many apps do you download in a typical month?	How much do you spend per month on apps and other downloadable content?	Per App
	2012	2.65	\$1.75	2012 per app spending: \$0.66
	2013	<b>2.31</b>	<b>\$1.29</b>	2013 per app spending: <b>\$0.56</b>
	2012	3.05	\$3.51	2012 per app spending: \$1.15
	2013	<b>2.37</b>	<b>\$1.72</b>	2013 per app spending: <b>\$0.73</b>

**Base:** Graph 1 & 2 Total respondents who have downloaded apps in the last 12 months. For 2012: Tablets (334), Smartphones (647), for 2013: Tablets (520), Smartphones (966)

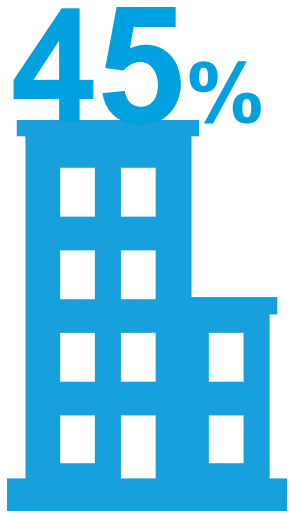
This decline in app downloads is consistent across other countries

How many apps do you download in a typical month? (smartphone users only)



Base: Smartphone owners who downloaded apps in the last 12 months (2013, 2012): Argentina 733, 337, Brazil 508, 540, Mexico 862, 475, US 868, 664

# Executive Summary: many employers have BYOD policies – providing reimbursement and support for personal devices



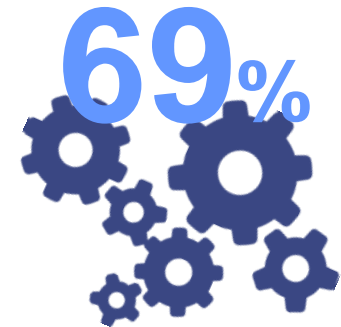
...of companies have BYOD policies



...of employees who work where BYOD policies are offered primarily use their personal device on the job – with significantly more males and younger age demographics adopting



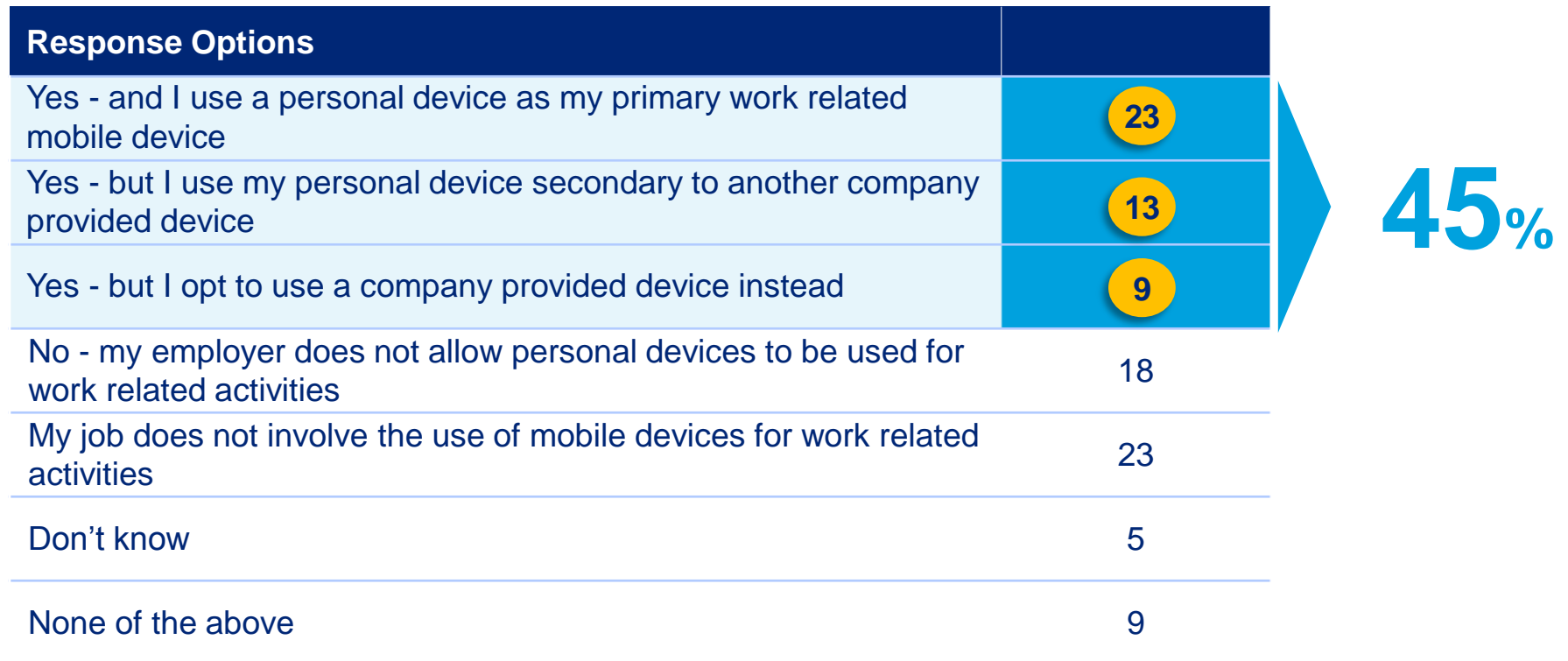
...of personal device users receive the same or more reimbursement amount from their employers



...of personal device users do not encounter challenges as a result of using a personal device at the workplace

# Almost half of companies have BYOD-friendly policies

Does your employer currently have a policy that allows use of personal devices in the workplace?

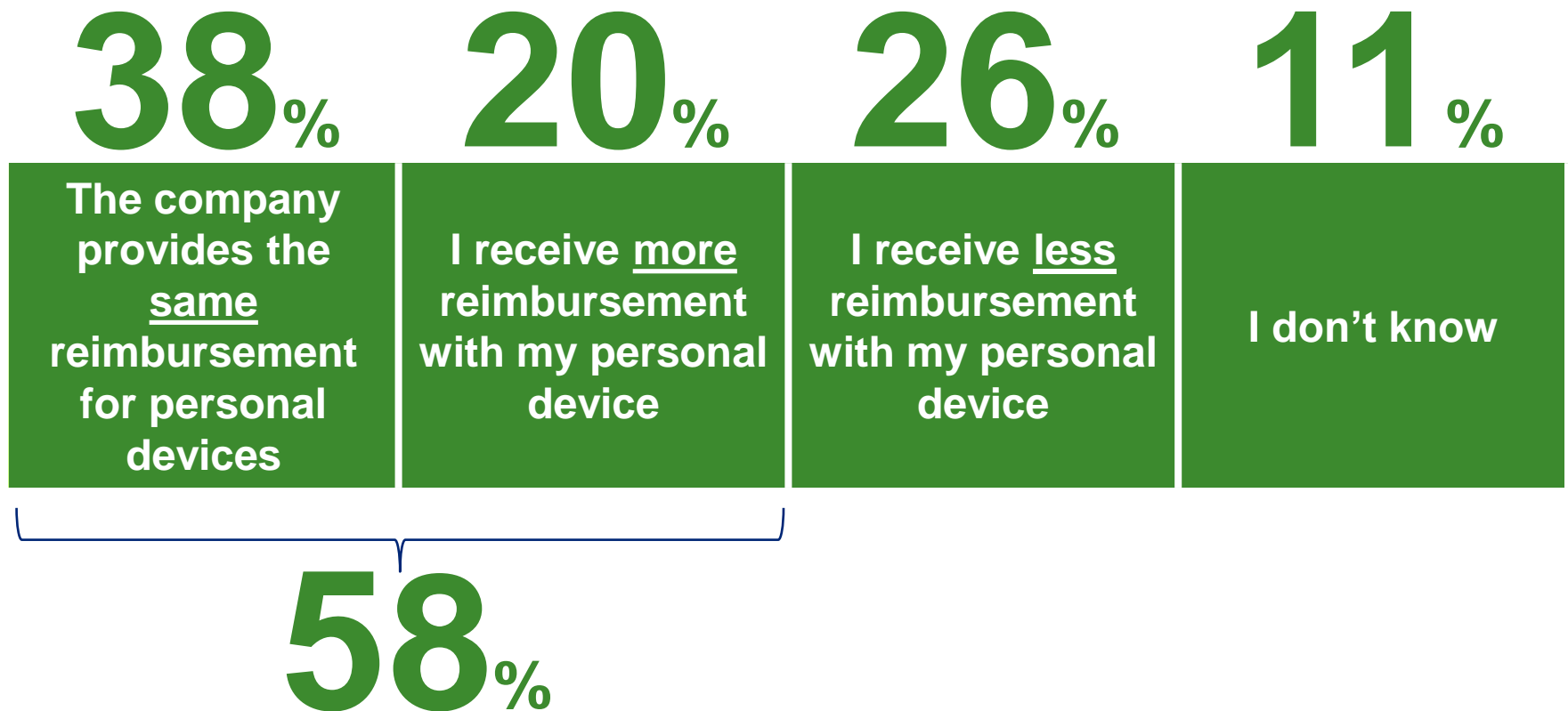


All figures in %

Base: Total respondents who work and own at least one portable device: 1,921

58% of personal device owners receive the same or more reimbursement as a result of using their personal device at work

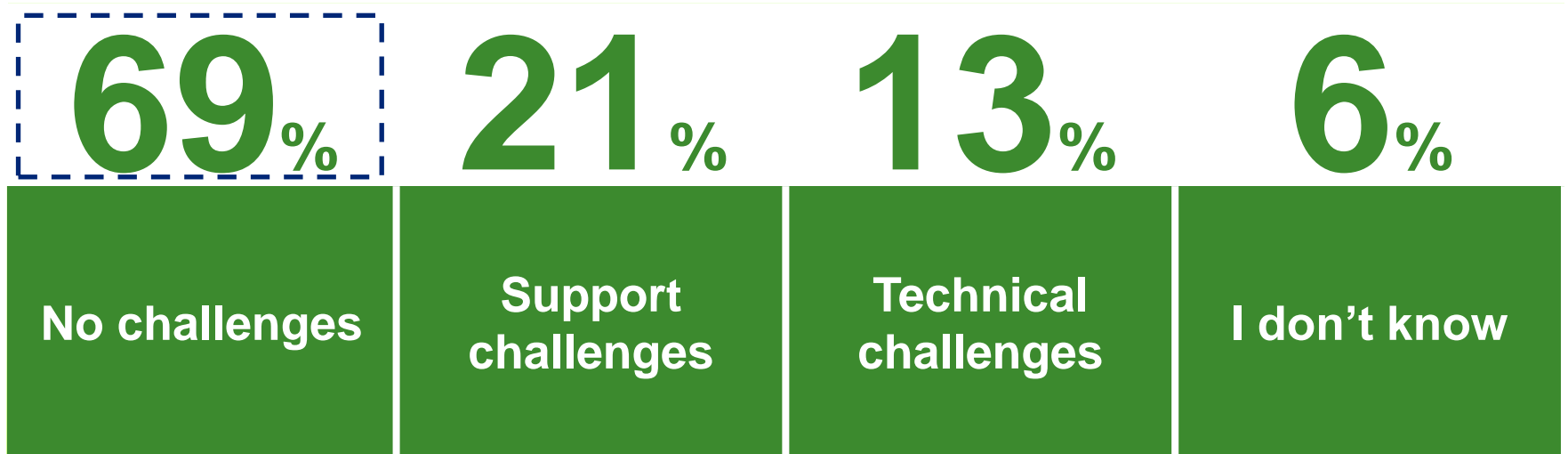
Does your employer's reimbursement policy differ if the device is personal or company provided?



Base: Total respondents who have an employer who reimburses costs: 173 (Those who chose 'None of the above' are excluded in the chart above)

# Most personal-device users do not encounter technical or support challenges as a result of BYOD

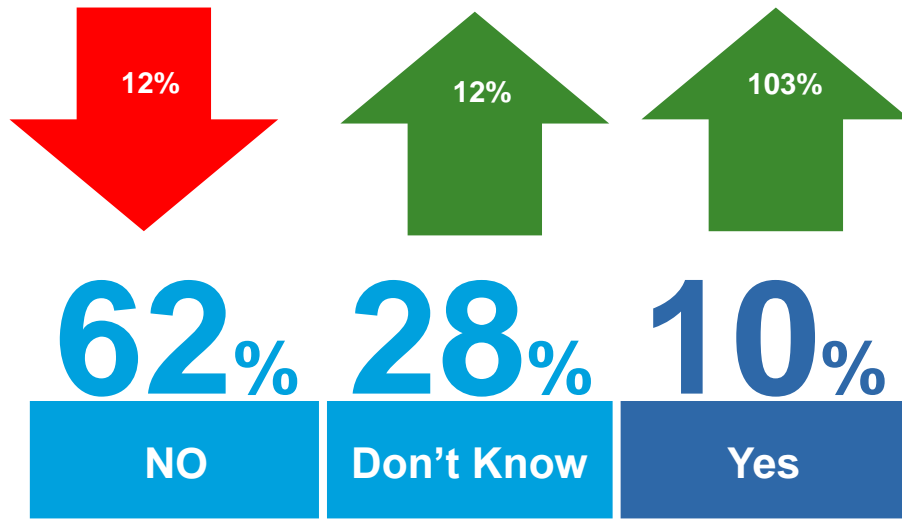
Have you ever encountered any challenges as a result of using your own device as opposed to a company approved / provided device?



Base: Total respondents who use personal devices in the workplace: 535

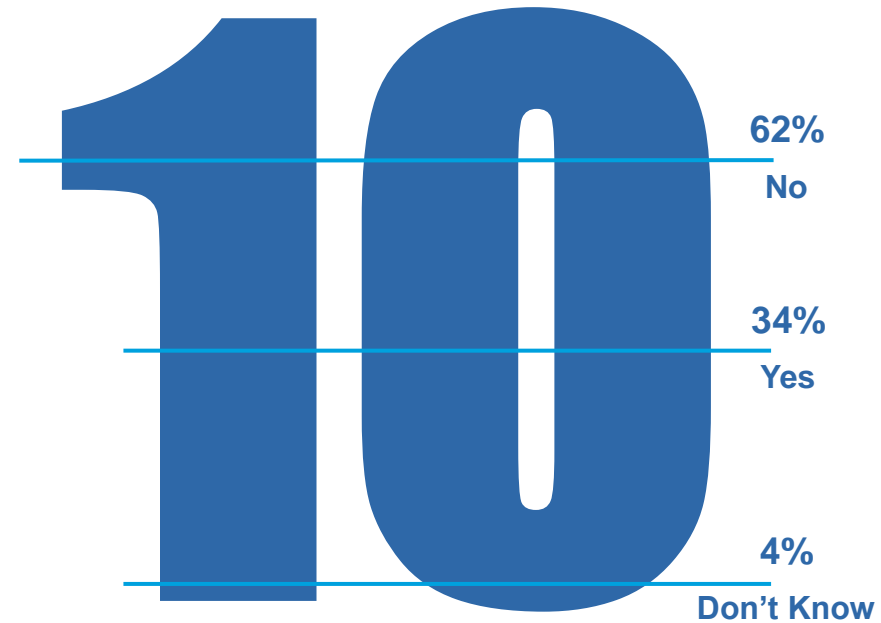
# While NFC has a small user base, its numbers are growing and its users show commitment to the technology

Does your phone have NFC technology?



▲▼ Increase/Decrease in % Y-Y change (2012 – 2013)

Have you used the NFC capability on your device during the last month?



Base: Total respondents: (2012) 1722, (2013) 1752



# Significantly more males have – and use – NFC technology

**Does your phone have Near Field Communication (NFC) technology?**

	Yes	No	Don't know
Male	13	60	26
Female	7	63	30

*All figures in %*

**Have you used the NFC capability on your device during the last month?**

	Yes	No	Don't know
Male	39	56	6
Female	26	71	3

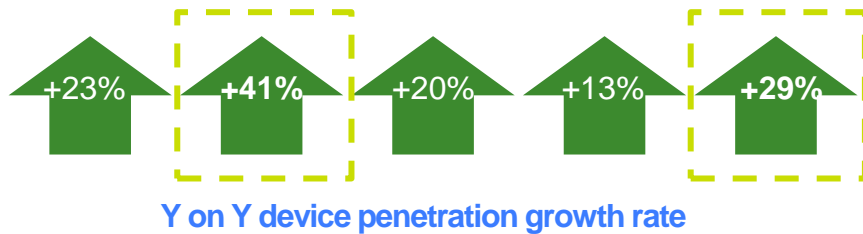
*All figures in %*

Base: Total respondents: (2012) 1722, (2013) 1752

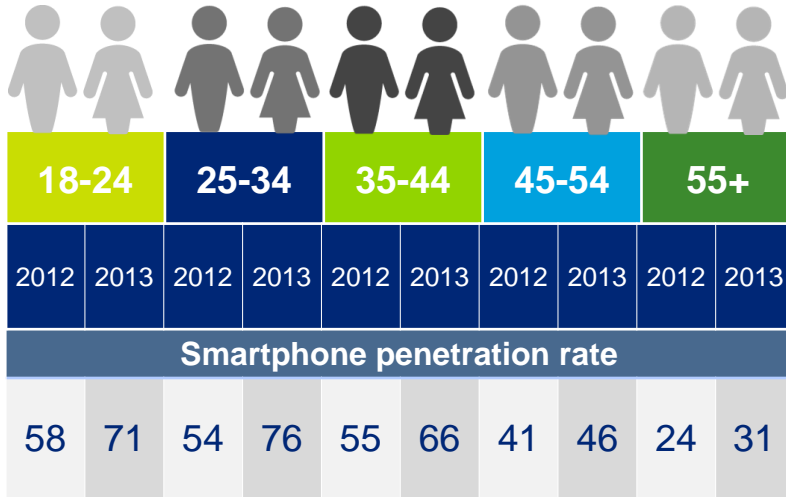
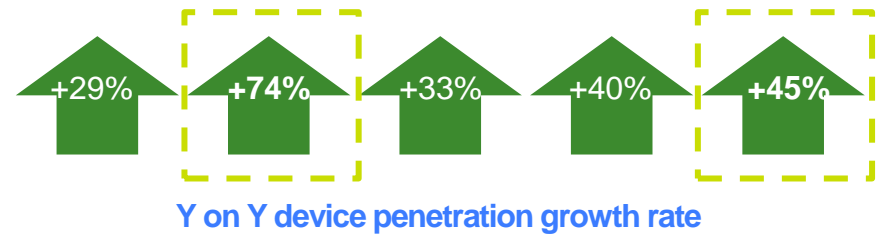
# Tablet growth is skyrocketing among 25-34 year olds and smartphone growth is still strong; 55+ shows the second-highest growth

Which of the following portable devices do you own or have ready access to?

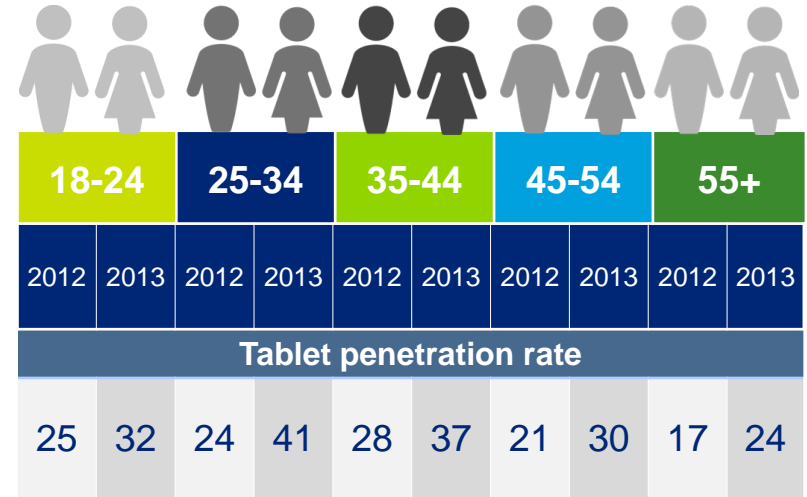
## Smartphone ownership by age group



## Tablet ownership by age group



All figures in %

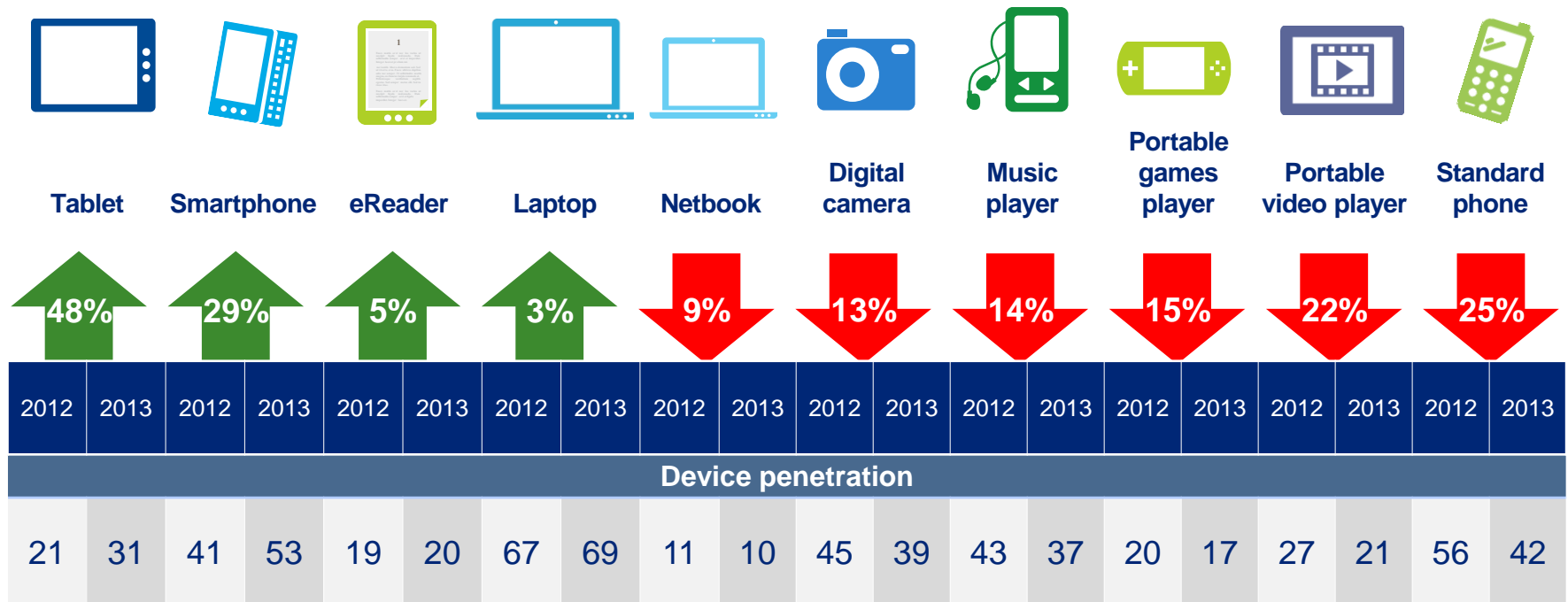


All figures in %

Base: Graph 1 & 2 Total respondents (2012) 2,022, Total respondents (2013) 2,000

In 2013, the tablet is the device with the fastest growth in ownership, well above smartphones; tablet/smartphone replacing other devices

Which of the following portable devices do you own or have ready access to?



▲ Increase/▼ Decrease in % Y-Y change (2012 – 2013)

All figures in %

Base: Total respondents (2012) 2,022, Total respondents (2013) 2,000

# Tablet use drives more smartphone use but less laptop use

Since you have owned a tablet, do you use your ...



Laptop

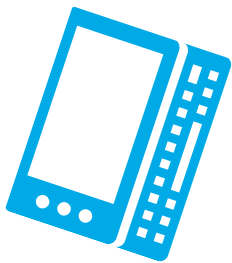
20% 43% 34% 3%

More frequently

Same amount

Less frequently

Don't know



Smartphone

27% 50% 19% 4%

More frequently

Same amount

Less frequently

Don't know

Base: Total respondents who own both a smartphone and a tablet : 437

Base: Total respondents who own both a laptop and a tablet : 494

# Tablets and smartphones have unique usage profiles

In the last week, for which of the following activities did you use your device? (Top 18 activities)

Activities	Smartphone	Rank	Tablet	Rank
Email (for work, or personal)	73%	1	50%	1
Social networks	63%	2	43%	3
Using search engines	60%	3	45%	2
Taking photos and video	56%	4	20%	10 (t)
Navigation or maps	41%	5	17%	13 (t)
Online banking	36%	6	22%	9
News and sport websites	35%	7	28%	7
Browsing retailers websites	33%	8	37%	4
Playing games offline	33%	8 (t)	36%	5
Listening to music saved on device	29%	10	17%	13 (t)
Playing games online	23%	11	23%	8
Listening to online radio	22%	12	18%	12
Streaming music	18%	13	8%	18
Online payments	15%	14	11%	17
Buying goods	11%	15	17%	13 (t)
Reading books	10%	16	30%	6
Streaming/Watching TV or Movies online	9%	17	20%	10 (t)
Watching TV/movies/video saved on your device	8%	18	17%	13 (t)

Base: Total respondents (2013) Smartphone – 999, Tablets – 624

## To learn more

This overview contains just a small percentage of the data gathered in this year's survey.  
For more information, please contact:

Press inquiries:

Anisha Sharma

+1 917 464 3713

[anishsharma@deloitte.com](mailto:anishsharma@deloitte.com)

Sam Johnston

Hill & Knowlton Strategies

+1 212 885 0499

[Sam.johnston@hkstrategies.com](mailto:Sam.johnston@hkstrategies.com)



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