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device selection increases and usage profiles change

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Nov. 20, 2013 — When it comes to their mobile devices, American consumers are “addicted to speed” and are often willing to pay more to get it. They also toggle between Wi-Fi and 4G wireless technologies to get the fastest possible connection for their devices. That's according to the latest “Global Mobile Consumer Survey” from Deloitte. The study offers insight into consumer purchasing habits, wants and trends in the U.S., with a focus on mobile devices, technologies and services.

The survey reveals that Wi-Fi has grown significantly in the U.S. marketplace. In fact, nearly two-thirds of consumers now report that they most often connect their smartphones to Wi-Fi networks as opposed to a mobile network when using the

Internet. Similarly, U.S. consumers also reported a willingness to spend more to get

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Usage of Wi-Fi “out and about” and “at someone else's home” is also increasing (with 44 percent of respondents indicating use at someone else's home), particularly in comparison to “at home” and “at work.”

“What drives mobility and enables everything in the ecosystem is ultimately the wireless network,” said Craig Wigginton, vice chairman and U.S. telecommunications sector leader, Deloitte LLP. “As consumers become more comfortable moving between types of networks, we anticipate a 'peaceful co-existence' between Wi-Fi and 4G to support all types of activities, be it for work, play or new types of social interactions.”

Price matters...for Some

The survey also reveals that when choosing a particular smartphone device, consumers were split with regard to price based on whether they are smartphone owners or not. For non-smartphone owners, “cost of the device” was listed as the #1 reason for selecting their device, while it was last amongst the most common reasons for smartphone owners – no other response in the survey was less important than price for this group of tech-savvy consumers.

App Saturation?

The survey reveals that the number of app downloads, as well as per app spending actually decreased from 2012 to 2013 – with the greatest reduction coming in tablets. This decrease occurred not only in the U.S. (decreasing 13 percent), but is also consistent across other countries surveyed with Brazil downloads decreasing 36 percent, Argentina decreasing 17 percent, and Mexico decreasing 14 percent.

“The good news is, we see a lot of potential remaining in the apps marketplace over the long term,” said Wigginton. “We believe that the overall declines indicated in this year's survey may be due to increasing sophistication among consumers. It is

likely that they have already obtained the core apps they prefer for work and play,

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incompatibility/ challenges) around BYOD may be less of a factor than anticipated with 69 percent of organizations who implemented a BYOD policy reporting they experienced no technical, or support related challenges.

The Future of NFC and Mobile Payments

Near-Field Communication (NFC) technology, while still niche, is showing strong use amongst a small group of consumers. The survey reveals that 10 percent of respondents say that their phone has NFC technology, a 103 percent increase from 2012. Additionally, over one third of the people who have the technology, have used it in the past month –indicating a small but loyal following.

The Tablet Effect

The survey shows that of all mobile devices, tablets have the fastest growth of ownership, increasing 48 percent since 2012. From a demographic standpoint, growth is greatest among those aged 25-34 with 74 percent year over year growth, and the second largest growth is with those aged 55 and older (45 percent year over year growth). Tablets and smartphones are also replacing many other types of single-purpose devices including e-readers, music players, game players and video players; and there is strong growth in dual ownership of smartphones and tablets as well as of laptops and tablets.

Furthermore, tablet use is driving more smartphone use but less laptop use, with 34 percent of tablet owners indicating they now use their laptop less often. At the core of this phenomenon is that tablets are being used more as 'fixed' devices (albeit portable) than truly 'mobile' devices. The survey also notes that the most popular activities for tablets are those when consumers are typically fixed for longer periods of time – watching movies, streaming content, reading books, etc. – while smartphones are most popular for more dynamic activities, such as navigation, email and photos.

“Growth in tablets, particularly among select age groups, is still very strong. It's also

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