

CONNECTED LIVING 2025

An international study of consumer expectations for mobile operators, smart cities and the connected workplace

We asked 1,200 young people from all over the world to predict what mobile technology will look like in 10 years' time. This is what they told us...

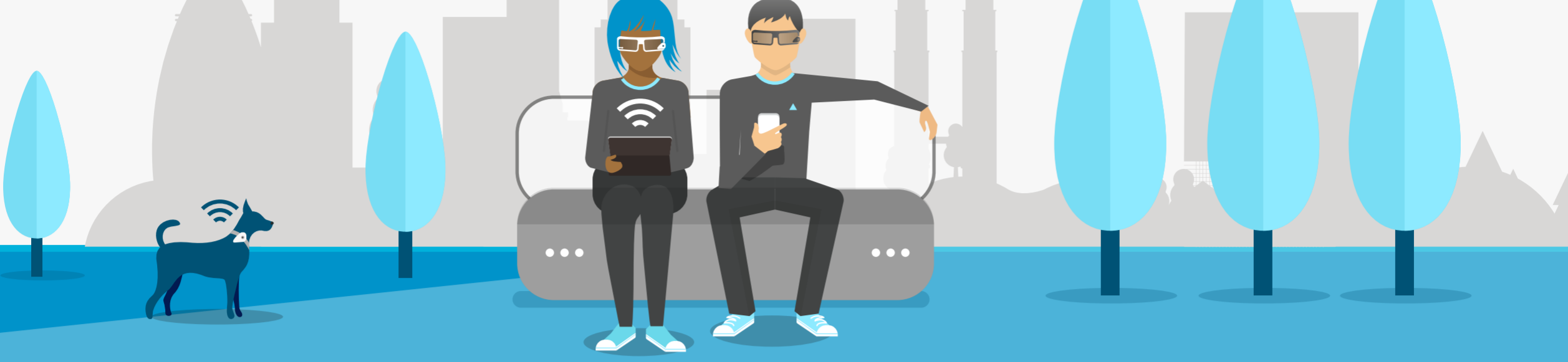
gemalto
security to be free

High-speed internet and super-smart devices

61% expect always on mobile data and seamless wi-fi offloading wherever they are

87% expect high-speed 5G internet access to make accessing any online content a painless experience

67% still expect to unlock their phone with a fingerprint, but 43% expect to scan their retinas and 33% think their phones will be able to identify their DNA



Travelling around the smart city of the future

56% expect NFC-based, paperless travel to be the norm.
You won't even have to tap your card or phone - the barriers will open automatically as you approach

69% expect high-speed connectivity aboard all public transport,
above and below ground. 44% expect transport systems to automatically adapt to surges in demand

59% also expect car keys to be made obsolete in favour of touch-based DNA recognition
Over a quarter even expects to be able to take a nap on a flat bed while their car does the hard work!

If you don't want to drive, you won't have to!
63% expect driverless cars to be commonplace in 2025

A healthy, hyper-connected society

63% expect healthcare trackers to show you a 3D display of your heart

50% expect to be able to view a 3D display of their teeth in their smart glasses while they brush

59% expect a connected implant to provide them and their doctor with real-time access to blood pressure levels

43% Forgot the shopping? Don't worry. **43%** expect your virtual PA to order what you need automatically.

61% think they'll never miss a meeting in 2025 thanks to virtual PAs organising their schedule. **42%** expect them to plan their social lives too!

32% expect coins to be a thing of the past. **42%** expect to be able to buy anything with their mobile, and **69%** expect to be using dynamic smart cards whose details change every minute

A new era of work

63% think our employers will use fingerprints to control access to our places of work

49% think our workplaces will be able to identify our faces, while **42%** expect to get into the office simply by using their voice

43% think employers will monitor productivity via wearable trackers, and **25%** expect computers to be able to read thoughts directly from their brain

Over half of consumers still think we'll be using smartphones, tablets and laptops at work in 2025

The global picture

USA
42% of Americans still expect to be paranoid about data security
50% expect their virtual PA to shop for them without needing any prompt
92% expect to be enjoying super-fast 5G access
78% expect high-speed internet access whenever and wherever they travel

UK
86% expect 5G to grant them access to any online content seamlessly
40% believe there will be no limits to what you can buy with your phone in 2025
Over half (52%) expect to be using smart glasses in the workplace
Fewer Brits expect driverless cars to be commonplace in 2025 than the other countries surveyed

GERMANY
40% of German youths expect a paranoid mind-set around data security
58% expect contactless payments to take a quarter of a second to complete
Germans are the least confident (78%) about the availability of ultra fast 5G in 2025
Germans are the least confident in the ability of technology to read our minds, with only 10% expecting a direct brain interface

BRAZIL
37% expect people to be complacent about data security
74% believe contactless payments will take quarter of a second to complete
97% expect 5G connections to make access to all online content seamless
77% expect the satellite navigation systems of 2025 to show a detailed 3D display to stop you getting lost

FRANCE
French consumers in general had lower expectations about mobile technology than the other countries surveyed
Only 22% expect the end of coins thanks to contactless payments
Less than a fifth (19%) expect all mobile payments to provide the option of credit card, carrier billing or third party payment payments
Just over a fifth (21%) expect activity trackers to be making exercise recommendations to boost flexibility, compared with over half of Chinese and Brazilians

CHINA
The Chinese are the most confident (63%) about using retina scanning to unlock their phones
84% expect to be using dynamic bank cards which continuously adapt
65% expect mobile operators to track your safety by monitoring your movements and a voice-activated panic alarm built into your phone
70% expect to spend commuting time browsing interactive, personalised ads

Six challenges mobile operators should evaluate today

- 1 Move towards dynamic infrastructure management**
Network infrastructures will have to flex between different needs. Dynamic management could be a potential new business model for MNOs
- 2 Position as an IoT connectivity aggregator**
MNOs will have a responsibility to play a "hub" role for the connected world. They can make the connected world accessible to every service provider
- 3 Take some risks to enable the IoT**
A wide range of new connected devices or use cases will develop very fast. Operators will need to follow the pace of new trends, and be ready to try anything
- 4 Provide the next level of Customer Experience**
MNOs will need to provide the most reliable connectivity experience to make consumers feel they can easily embrace the new world of mobility
- 5 Develop a marketing service offering**
Intelligent marketing is high on the expectation list for the world's youth. MNOs will need to facilitate exchanges of information of mutual benefit to their customers and themselves
- 6 Defend the data and enable the security of end-users**
Consumer expectation in the study is that their providers - including their mobile operators - need to take a bigger role in securing them and protecting their data

For more information, and to read the full Connected Living 2025 report, visit: www.gemalto.com/connected-living-2025

About the research:
Just over 1,200 consumers aged 18-30 were surveyed by Smart Survey in an online poll in December 2015, on behalf of Gemalto. Respondents were approximately evenly split between Brazil, China, France, Germany, the United Kingdom and the United States.