



— 2019 —

ANNUAL SURVEY

HIGHLIGHTS

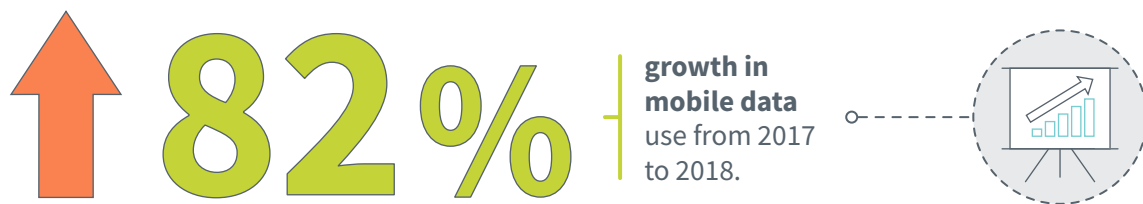


Executive Summary

Since 1985, CTIA has tracked the evolution of the U.S. wireless industry with a comprehensive annual survey. Our 2019 Annual Survey report provides an in-depth look at the facts and figures that tell the story of America's wireless industry.

The story of the past year begins with unprecedented consumer demand. In 2018, wireless use was up across nearly every metric we track—from voice minutes, to text messages, to data use.

Mobile data use nearly doubled in one year.



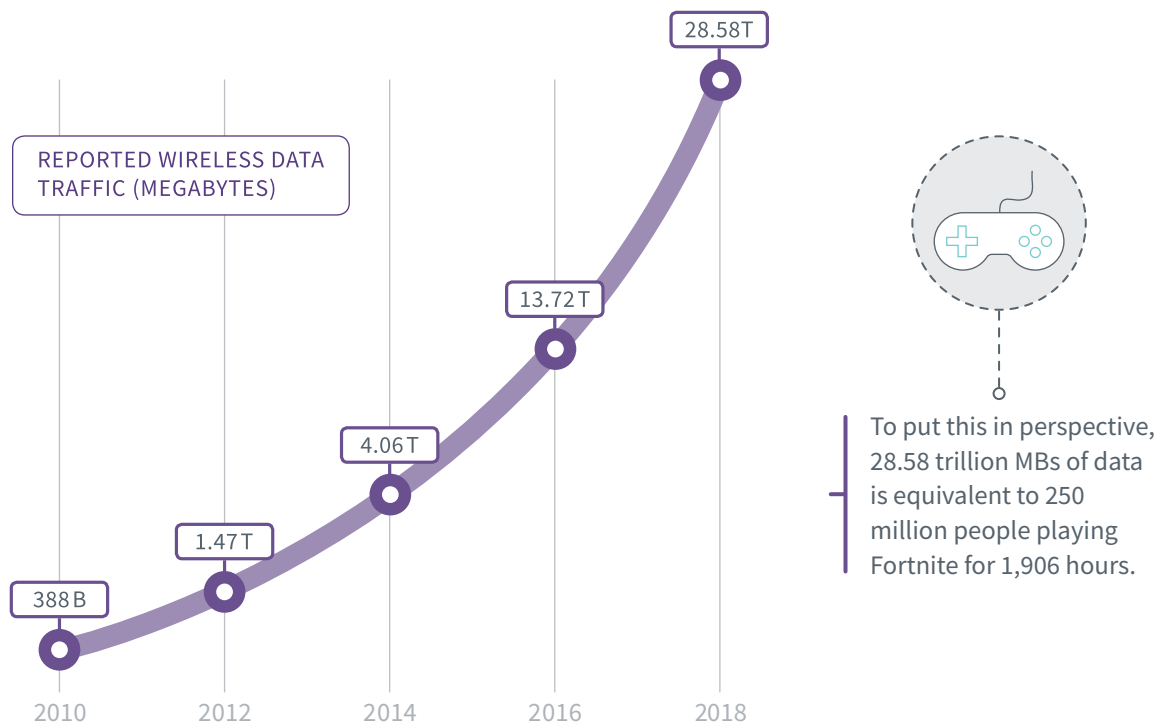
Wireless has never played a more central role in how we live, work, and play.

To meet this demand for everything wireless and prepare for the needs of tomorrow, the industry increased their capital investment in 2018—expanding their networks' capabilities, deploying more cell sites, and launching the next generation of wireless. 5G's speed, capacity, and responsiveness are poised to transform our industries and the way we connect with the world around us.

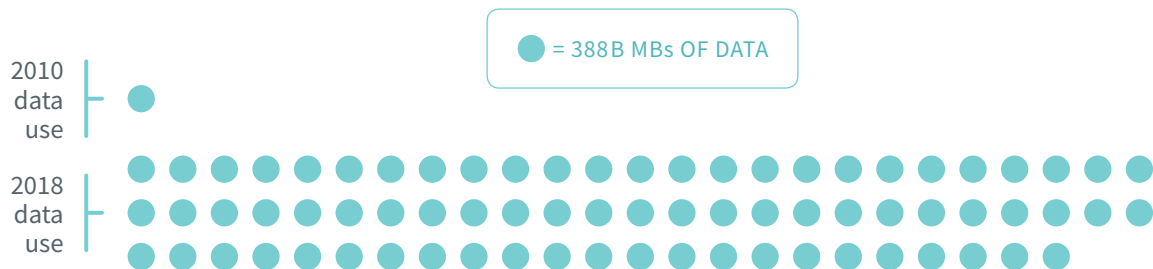
While America's wireless industry is leading the way on 5G, we need policymakers to make more spectrum available for commercial wireless use and continue to ease barriers to 5G deployment. Unlocking more spectrum will enable us to meet tomorrow's demand for wireless services and continue our global wireless leadership.

Wireless data use almost doubles in just one year.

Wireless data puts the internet in the palm of our hand and allows us to access nearly anything or anyone on the go, and its tremendous value to consumers shows no signs of slowing. This year, we saw mobile data grow by **12.89 trillion MBs** to a **total of 28.58 trillion**.



That's an **over 82 percent increase** in the last year alone and is more data than was used in the first six and a half years of this decade—combined. In fact, data use is up over **73x since 2010**.

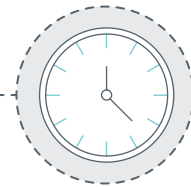


Voice minutes and text messages are up too.

While much of today's wireless communication is now wireless data, the number of voice calls and traditional text messaging grew over the past year too.

2.4T

The number of minutes consumers spent talking on their mobile devices—a **9.6 percent increase** over 2017.



That is equivalent to about 58K people spending their whole lives talking on the phone.



2T

The number of text messages exchanged in 2018—a **15.8 percent increase** over 2017.



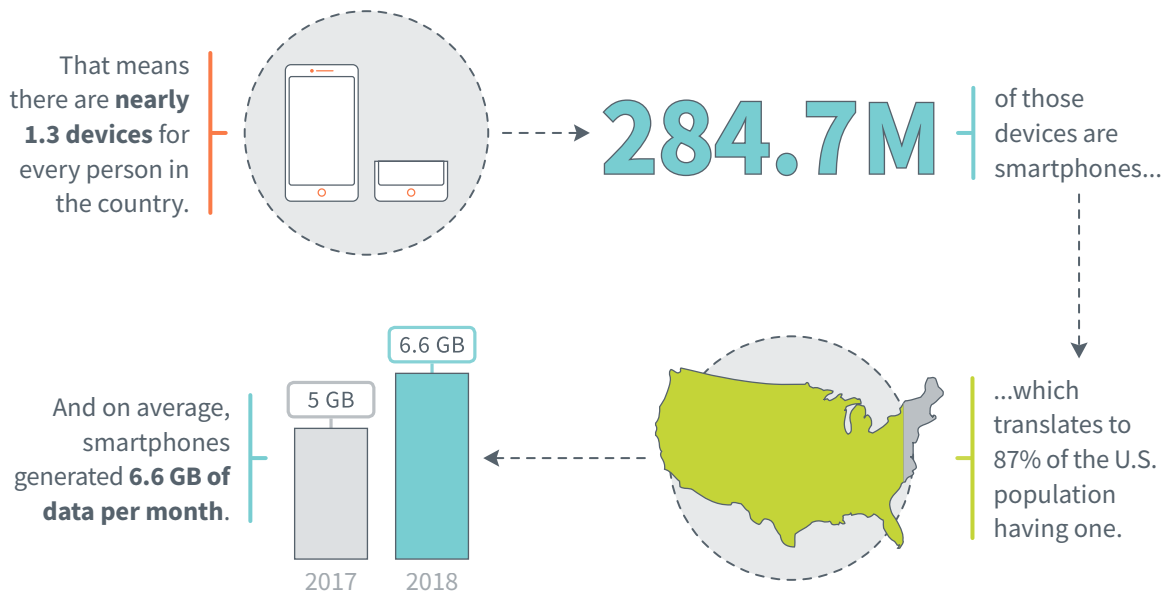
= **5.5B** → = **63K**

TEXTS PER DAY

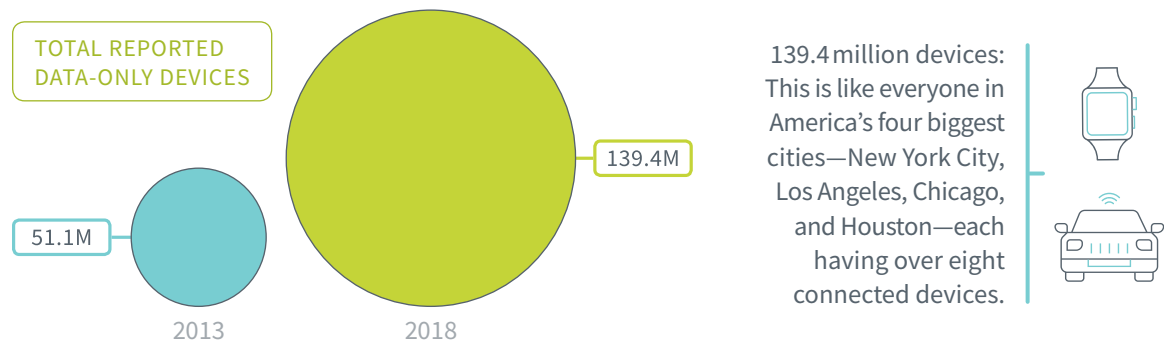
TEXTS PER SECOND

Americans continue to connect more devices—and not just smartphones.

This growth in voice calls, texts, and data is driven in part by the increasing number of wireless devices in the U.S. In 2018, Americans connected another 21.5 million mobile devices for a **total of 421.7 million devices**.



This tremendous growth in data is also being driven by the increasing number of data-only devices, like connected cars, smartwatches, and health monitors. These devices, connected by wireless networks, jumped over **10 percent** this year to **139.4 million devices**.



To power this growth, America's wireless industry increased investment.

This story of growth is made possible because of the industry's continued investment in infrastructure, technology, and people.



— in wireless industry capital investment in 2018.

Since the launch of 4G in 2010, the industry has made **over \$253 billion** in capital investments. This year, the industry's investments increased \$1.8 billion to a total of \$27.4 billion.

Much of this investment goes toward expanding the capacity and coverage of wireless networks and upgrading their technology to support 5G, including through increased infrastructure deployment.

In 2018, **349,344 cell sites** were in operation—up 8 percent.

This investment also helps wireless providers innovate to create better products and services for our customers. For instance, wireless providers continue to invest in improving network speeds to support more and more data-intensive applications—today, consumers benefit from **90 percent faster** download speeds than just five years ago.

In addition to this investment in their networks, wireless providers also directly employed 206,855 people in 2018. Wireless jobs are good jobs, paying **over fifty percent** more than the average wage in the United States.

Supporting the wireless needs of tomorrow.

Beyond this direct investment in networks and people, the wireless industry invests in the American economy and contributes to the U.S. government too.

America's wireless industry supports over 4.7 million jobs and contributes \$475 billion annually to the economy. And since the first spectrum auction in 1994, we've contributed over \$116 billion to the U.S. Treasury through investment in spectrum licenses.

4.7M

U.S. JOBS SUPPORTED

\$475B

TO U.S. GDP

\$116B

TO U.S. TREASURY

And these investments are just the beginning. Looking ahead, 5G promises to contribute even more to America's economic success story. Wireless providers are starting to **invest a projected \$275 billion** to deploy 5G, creating **three million jobs** and adding **\$500 billion to U.S. GDP**.

But to realize 5G's potential and meet tomorrow's wireless needs, we need policymakers to act to free up key low-, mid-, and high-band spectrum. More spectrum will unleash additional economic benefits too.



A five-year
auction
schedule
would add

\$391B + 1.8M

TO U.S. ECONOMY

NEW JOBS

Taking steps to unlock more spectrum and support 5G networks will help us continue the success story of wireless in the United States—one that is built on investment, innovation, and global leadership.