The Smartphone Consumer 2012

June 2012
Methodology

• In January/February 2012, Edison Research and Arbitron conducted a national telephone survey offered in both English and Spanish language (landline and mobile phone) of 2,020 people aged 12 and over
• Data were weighted to national 12+ population figures
• This is the 20th study in this series, dating to 1998
Half of Cell Phone Owners Have a Smartphone

Cell Phone Ownership

- Smartphone: 44%
- Non-Smartphone Cell Phone: 44%
- Do Not Own a Cell Phone: 12%
Smartphone Ownership Has Increased 40% in the Last Year

Own iPhone, Android, BlackBerry, or Windows Smartphone
Nearly One Third of Smartphone Users Purchased Their First Smartphone in the Last 12 Months

“How long have you been a smartphone owner?”

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 Months to &lt; 1 Yr.</td>
<td>15%</td>
</tr>
<tr>
<td>3 Months to &lt; 6 Months</td>
<td>8%</td>
</tr>
<tr>
<td>Less Than 3 Months</td>
<td>9%</td>
</tr>
<tr>
<td>1 Yr. to &lt; 3 Yrs.</td>
<td>38%</td>
</tr>
<tr>
<td>3 Yrs. to &lt; 5 Yrs.</td>
<td>16%</td>
</tr>
<tr>
<td>5 Yrs. or More</td>
<td>12%</td>
</tr>
<tr>
<td>Don't Know</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Base: Own a Smartphone
Android Phones Remain the Most Popular

"Do you currently own..."

<table>
<thead>
<tr>
<th>Device</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Android Phone</td>
<td>13</td>
<td>22</td>
</tr>
<tr>
<td>Apple iPhone</td>
<td>9</td>
<td>17</td>
</tr>
<tr>
<td>BlackBerry</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Windows OS Phone</td>
<td>N/A</td>
<td>8</td>
</tr>
</tbody>
</table>
Demographic Composition of Smartphone Owners

More Than Half of Smartphone Owners Are Age 12-34

Base: Own a Smartphone
Nearly Four in Ten 18-34s Own an Android Phone

Android Smartphone Ownership

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Male 2011</th>
<th>Male 2012</th>
<th>Female 2011</th>
<th>Female 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-17</td>
<td>15</td>
<td>16</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>18-24</td>
<td>21</td>
<td>22</td>
<td>36</td>
<td>37</td>
</tr>
<tr>
<td>25-34</td>
<td>22</td>
<td>23</td>
<td>36</td>
<td>36</td>
</tr>
<tr>
<td>35-44</td>
<td>14</td>
<td>14</td>
<td>26</td>
<td>27</td>
</tr>
<tr>
<td>45-54</td>
<td>9</td>
<td>10</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>55-64</td>
<td>9</td>
<td>10</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>65+</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>
iPhone Ownership Concentrated Age 12-44

iPhone Ownership

[Bar chart with percentage data for iPhone ownership by age group and gender for 2011 and 2012]
BlackBerry Ownership Down Significantly Among 35-64s

BlackBerry Ownership

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Male 2011</th>
<th>Female 2011</th>
<th>Male 2012</th>
<th>Female 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-17</td>
<td>6</td>
<td>8</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>18-24</td>
<td>12</td>
<td>14</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>25-34</td>
<td>10</td>
<td>8</td>
<td>19</td>
<td>11</td>
</tr>
<tr>
<td>35-44</td>
<td>15</td>
<td>10</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>45-54</td>
<td>9</td>
<td>5</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>55-64</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Male Female 12-17 18-24 25-34 35-44 45-54 55-64 65+
Windows OS Phone Ownership Skews Slightly Female

Windows OS Phone Ownership

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-17</td>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>18-24</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>25-34</td>
<td>8</td>
<td>11</td>
</tr>
<tr>
<td>35-44</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>45-54</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>55-64</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>65+</td>
<td>7</td>
<td>9</td>
</tr>
</tbody>
</table>

percent

2012
Smartphone Ownership Increases With Income

Smartphone Ownership by Household Income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $25K</td>
<td>18</td>
<td>30</td>
</tr>
<tr>
<td>$25K-$50K</td>
<td>29</td>
<td>40</td>
</tr>
<tr>
<td>$50K-$75K</td>
<td>34</td>
<td>44</td>
</tr>
<tr>
<td>$75K-$100K</td>
<td>37</td>
<td>55</td>
</tr>
<tr>
<td>Over $100K</td>
<td>55</td>
<td>70</td>
</tr>
</tbody>
</table>

Edison Research
One in Five Smartphone Owners Listen to Radio Most at Work Through a Mobile Device

“Thinking about how you listen to the radio while at work, do you most often listen...?”

- On a Regular Radio: 59%
- On Your Computer Over the Internet: 18%
- On a Mobile Device Such as a Smartphone: 20%
- Don't Know: 3%

Base: Smartphone Owners Employed Full/Part-Time and Listen to the Radio While at Work (51% of Smartphone Owners)
Smartphone Owners Are Far More Likely to Keep Their Phones Close at All Times

“How often is your cell phone with you or nearby, when it is within arm’s length?”

Non-Smartphone Cell Phone Owners

- Always 44%
- Most of the Time 33%
- Sometimes 15%
- Rarely 5%
- Almost Never 3%

Own a Smartphone

- Always 60%
- Most of the Time 31%
- Sometimes 7%
- Rarely 1%
- Almost Never 1%
Nearly Half of Smartphone Owners Browse the Mobile Web Several Times Per Day

% Who (Item) on a (Non-Smartphone Cell Phone/Smartphone) “Several Times Per Day” or More

- Make Calls or Receive Calls: 86%
- Send or Receive Text Messages: 78%
- Take Pictures with Phone's Camera: 78%
- Browse the Internet: 46%
- Use Social Networking Sites: 34%
- Listen to Downloaded Music: 25%
- Play Games: 21%
- Listen to Online Radio: 12%
- Watch Video: 11%
- Purchase an App: 10%
- Download Coupons From Retailers: 4%

Non-Smartphone Cell Phone Owners

Own Smartphone

edison research
Half of Smartphone Owners Use Voice Commands on Their Phones

“How often do you use voice commands on your cell phone such as dialing a contact from your address book, playing music by a certain artist or looking up information from the Internet all with just your voice?”

- **Never**: 51%
- **A Few Times Per Month or Less**: 18%
- **At Least Once a Week**: 11%
- **About Once a Day**: 7%
- **Several Times Per Day**: 13%

**Base**: Cell Phone Has the Ability to Take Voice Commands (74% of Smartphone Owners)
“How interested would you be in the ability to use voice commands on your cell phone such as dialing a contact from your address book, playing music by a certain artist or looking up information from the Internet all with just your voice?”

Smartphone Owners Show Greater Interest in Voice Command Features

Smartphone Owners Without Voice Capability

- Somewhat Interested: 25%
- Not Very Interested: 26%
- Very Interested: 18%
- Not at All Interested: 19%
- Don't Know: 29%

Non-Smartphone Cell Phone Owners

- Somewhat Interested: 19%
- Not Very Interested: 14%
- Very Interested: 18%
- Not at All Interested: 48%
- Don't Know: 1%

Base: Cell Phone Does Not Have the Ability to Take Voice Commands
Three in Ten Smartphone Owners Also Own a Tablet

“Do you currently own...”

<table>
<thead>
<tr>
<th>Device</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>iPod</td>
<td>50</td>
</tr>
<tr>
<td>Non-iPod MP3 Player</td>
<td>27</td>
</tr>
<tr>
<td>iPad</td>
<td>21</td>
</tr>
<tr>
<td>Portable eReader</td>
<td>20</td>
</tr>
<tr>
<td>Android-Based Tablet</td>
<td>12</td>
</tr>
</tbody>
</table>

Base: Own a Smartphone
Smartphone Owners Spend as Much Time Daily Online as They Do Watching Television

“In the last 24 hours, approximately how much time did you spend...”

(All Times Are Self-Reported)
Smartphone Owners Are Far More Likely to Use Social Networks

% Who Ever Use/Have a Profile Page on...

- Any Social Network
  - Do Not Own Smartphone: 41
  - Own Smartphone: 76
- Facebook
  - Do Not Own Smartphone: 40
  - Own Smartphone: 73
- LinkedIn
  - Do Not Own Smartphone: 7
  - Own Smartphone: 21
- Twitter
  - Do Not Own Smartphone: 4
  - Own Smartphone: 17
- Google+
  - Do Not Own Smartphone: 3
  - Own Smartphone: 14
- Location-based Services
  - Do Not Own Smartphone: 1
  - Own Smartphone: 6
How often do you use social networking Web sites or services?

More Than Half of Smartphone Owners Use Social Networks Nearly Every Day or More

- Nearly Every Day: 20%
- Several Times Per Day: 35%
- At Least Once a Week: 13%
- At Least Once Per Month: 6%
- Less Often Than Once Per Month: 4%
- Never Use Social Networking Sites: 22%
Smartphone Owners Are More Likely to Post Status Updates

“Do you ever post status updates to any social networking Web sites or services?”

Do Not Own a Smartphone

- Yes: 59%
- No: 41%

Own a Smartphone

- Yes: 71%
- No: 29%

Base: Use Social Networking Web Sites or Services
One in Three Smartphone Owners Who Post Status Updates Use Their Phones to Do So Nearly Every Day

“About how often do you update your status on social networks by cell phone?”

- Nearly Every Day: 15%
- Several Times Per Day: 20%
- At Least Once a Week: 30%
- At Least Once Per Month: 14%
- Less Often Than Once Per Month: 8%
- Never Update Status in This Way: 13%

Base: Own a Smartphone and Ever Post Status Updates to Social Networking Web Sites
Nearly Eight in Ten Smartphone Owners With a Facebook Profile Access it Through Their Phones

“Do you ever access Facebook on a cell phone?”

- Yes: 78%
- No: 22%

Base: Own a Smartphone and Have a Profile Page on Facebook
One-Quarter of Smartphone Owners Use a Tablet to Access Facebook

“Do you ever access Facebook on a tablet?”

Yes  26%

No  74%

Base: Own a Smartphone and Have a Profile Page on Facebook
More Smartphone Owners Access Their Facebook Profiles on a Cell Phone Than on a Desktop/Laptop/Tablet

“Which one way do you access Facebook most?”

- Cell Phone: 51%
- Desktop/Laptop: 45%
- Tablet: 4%

Base: Own a Smartphone and Have a Profile Page on Facebook
Smartphone Owners Check Their Facebook Accounts About Five Times Per Day

“In the last 24 hours, approximately how many times did you check your Facebook account?”

Mean # of times

- Do Not Own a Smartphone: 2.8
- Own a Smartphone: 4.8

Base: Have a Profile Page on Facebook
On Average, Smartphone Owners Report Having Nearly Twice as Many Facebook Friends

“Approximately how many Facebook friends do you have?”

Mean # of friends

- Do Not Own a Smartphone: 170
- Own a Smartphone: 327

Base: Have a Profile Page on Facebook
Smartphone Owners Who Use Twitter Do So Very Frequently

“How often do you use Twitter?”

- Nearly Every Day: 13%
- Several Times Per Day: 33%
- At Least Once Per Week: 23%
- At Least Once Per Month: 13%
- Less Than Once Per Month: 18%

Base: Smartphone Owners Who Currently Ever Use Twitter (17% of Smartphone Owners)
Half of Smartphone Owners Who Use Twitter Started Using it in the Last Year

“How long have you been a Twitter user?”

- 6 Months to < 1 Yr.: 30%
- 1 Yr. to < 2 Yrs.: 27%
- 2 Yrs. to < 3 Yrs.: 11%
- 3 Yrs. to < 4 Yrs.: 9%
- 5 Yrs. or More: 3%
- Less Than 6 Months: 20%

Base: Smartphone Owners Who Currently Ever Use Twitter
“How often do you hear about Twitter feeds – commonly called ‘tweets’ – through traditional media outlets such as TV, radio, newspapers or websites other than Twitter?”

Smartphone Owners Very Attuned To “Tweets” Mentioned In Other Media

- Almost Every Day: 57%
- Regularly, But Not Daily: 17%
- Sometimes: 10%
- Rarely: 7%
- Never: 4%
- Have Not Heard of Twitter: 5%

Base: Own a Smartphone
Four in Ten Smartphone Owners Follow a Company or Brand Via Social Networks

“Do you follow any companies or brands on any social networking sites such as Facebook or Twitter?”

- Yes: 41%
- No: 59%

Base: Own a Smartphone
Smartphone Owners Mostly Choose Facebook to Connect with Brands or Products

“Which social networking site or service do you use most to connect with brands or products?”

- Facebook: 76%
- Twitter: 10%
- Other: 9%
- None: 5%

Base: Smartphone Owners Who Follow Companies or Brands on Any Social Networking Sites
Nearly Half of Smartphone Owners Who Use Social Networks Say Facebook Most Influential Social Platform For Purchases

“Which social networking site or service influences your buying decisions the most?”

- Facebook: 45%
- Twitter: 7%
- Other: 6%
- None/Don't Know: 42%

Base: Smartphone Owners Who Use Social Networking Websites or Services at Least Once Per Month
Three Times as Many Smartphone Owners Are Members of a Daily Deals Site

“Are you a registered user of any daily deals sites or services such as Groupon or LivingSocial?”

- Do Not Own a Smartphone:
  - Yes: 8%
  - No: 92%

- Own a Smartphone:
  - Yes: 24%
  - No: 76%
Six in Ten Smartphone Owners Who Use Daily Deals Sites Registered in the Last Year

“How long have you been a registered user of daily deals services?”

- Less Than 6 Months: 29%
- 6 Months to < 1 Yr.: 32%
- 1 Yr. to < 2 Yrs.: 33%
- 2 Yrs. to < 3 Yrs.: 4%
- 3 Yrs. or More: 2%

Base: Smartphone Owners Who Are Registered Users of Daily Deals Sites/Services
“Have you watched video clips or other Internet video programming from YouTube in the last week?”

- **Do Not Own a Smartphone**
  - Yes: 23%
  - No: 77%

- **Own a Smartphone**
  - Yes: 55%
  - No: 45%
Smartphone Owners Are More Likely to Share YouTube Videos

“Have you shared a YouTube video with anyone in the last month?”

- **Do Not Own a Smartphone**
  - Yes: 32%
  - No: 68%

- **Own a Smartphone**
  - Yes: 49%
  - No: 51%

Base: Have Watched Video Clips or Other Internet Video Programming from YouTube in the Last Month
Three Times as Many Smartphone Owners Report Weekly Online Radio Listening

% Listening to Online Radio (AM/FM Streams & Internet-Only) in Last Week

- Do Not Own a Smartphone
  - Yes: 16%
  - No: 84%

- Own a Smartphone
  - Yes: 45%
  - No: 55%

Edison Research
Three in Ten Smartphone Owners Are Weekly Pandora Listeners

% Listening to Pandora Internet Radio in Last Week

- **Do Not Own a Smartphone**
  - Yes: 6%
  - No: 94%

- **Own a Smartphone**
  - Yes: 30%
  - No: 70%

edison research
Three in Ten Smartphone Owners Have Listened to Internet Radio in the Car Through Their Phones

“Have you ever listened to Internet Radio in a car by listening to the stream from a cell phone that you connected to a car stereo?”

<table>
<thead>
<tr>
<th>Yes</th>
<th>29%</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>71%</td>
</tr>
</tbody>
</table>

Base: Own a Smartphone
Nearly One in Five Smartphone Owners Have Ever Watched TV Programming Through Their Phone

% Watching TV Programming by Streaming or Downloading Shows to be Viewed on a Cell Phone...

- Ever: 19%
- In the Last Month: 13%

Base: Own a Smartphone