Mobile Internet & Smartphone Adoption

New Insights into Consumer Usage of Mobile Devices, the Shift to Smartphones & the Emergence of Tablets

United States (US), United Kingdom (UK), Germany (DE), France (FR) & Japan (JP)

Ipsos MediaCT Germany
The Media, Content and Technology Research Specialists

January 2011
Research conducted in January+February 2011 (phase 1) and September+October 2011 (phase 2).
To gain greater insight into consumer usage of mobile devices, the shift to smartphones and the emergence of tablets as a fourth screen we conducted original research amongst the total population in the US, UK, Germany, France and Japan. Phase 1 of the research was conducted in January and February 2011 and Phase 2 in September and October 2011.

**Key insights include:**

- More consumers use a mobile phone (feature phone or smartphone) than a computer (desktop or laptop) across all five countries.
- Consumers are clearly shifting from feature phones to smartphones and are increasingly using their smartphones for Internet access. However, smartphone owners are continuing to get online on their computers.
- Consumers are embracing tablets as the fourth screen. Tablet usage increased across all five countries with the highest penetration in the US. The rate of tablet usage is even higher amongst smartphone owners - hitting 17% in the US, 11% in Japan and 10% in the UK.
- The demographics of smartphone users are also shifting, with an increasing percentage of women and those aged 45+ adopting smartphones. Smartphone users continue to be comparatively highly educated and have higher than average income.

*smartphones measured are all what consumers named “private” or “personal” devices, does not include devices provided by employers.*
**Consumer Usage by Device**

**More Consumers Use a Mobile Phone than Use a Computer**

**Base:** All respondents, n=2000 per country per wave

**Q1:** Which, if any, of the following devices do you currently use?

**Phase 1 (Jan+Feb 2011)**

- **Feature phone / Smartphone:**
  - USA: 78%, 76%
  - UK: 69%, 68%
  - France: 87%, 89%
  - Germany: 74%, 80%
  - Japan: 76%, 96%

- **Netcount Laptop / Desktop:**
  - USA: 64%, 60%
  - UK: 49%, 47%
  - France: 43%, 43%
  - Germany: 53%, 52%
  - Japan: 60%, 60%

- **Desktop PC:**
  - USA: 51%, 49%
  - UK: 43%, 43%
  - France: 56%, 56%
  - Germany: 46%, 46%
  - Japan: 51%, 51%

- **Laptop / Notebook:**
  - USA: 60%, 60%
  - UK: 43%, 37%
  - France: 47%, 47%
  - Germany: 56%, 56%
  - Japan: 63%, 63%

- **Media player with web access:**
  - USA: 24%, 16%
  - UK: 17%, 16%
  - France: 17%, 18%
  - Germany: 23%, 18%
  - Japan: 4%, 4%

- **Netbook / Webbook:**
  - USA: 2%, 2%
  - UK: 9%, 9%
  - France: 3%, 3%
  - Germany: 8%, 8%
  - Japan: 4%, 4%

- **TabletPC / Slate / Pad:**
  - USA: 8%, 8%
  - UK: 4%, 4%
  - France: 6%, 6%
  - Germany: 5%, 5%
  - Japan: 6%, 6%

- **Handheld gaming device:**
  - USA: 15%, 13%
  - UK: 15%, 15%
  - France: 14%, 14%
  - Germany: 15%, 15%
  - Japan: 2%, 2%

- **eReader:**
  - USA: 3%, 2%
  - UK: 3%, 2%
  - France: 1%, 1%
  - Germany: 1%, 1%
  - Japan: 2%, 2%

**Phase 2 (Sept+Oct 2011)**

- **Feature phone / Smartphone:**
  - USA: 87%, 87%
  - UK: 69%, 68%
  - France: 74%, 80%
  - Germany: 73%, 79%
  - Japan: 86%, 86%

- **Netcount Laptop / Desktop:**
  - USA: 51%, 51%
  - UK: 43%, 43%
  - France: 56%, 56%
  - Germany: 46%, 46%
  - Japan: 63%, 63%

- **Desktop PC:**
  - USA: 49%, 49%
  - UK: 43%, 43%
  - France: 56%, 56%
  - Germany: 46%, 46%
  - Japan: 51%, 51%

- **Laptop / Notebook:**
  - USA: 37%, 37%
  - UK: 24%, 24%
  - France: 24%, 24%
  - Germany: 33%, 33%
  - Japan: 34%, 34%

- **Media player with web access:**
  - USA: 17%, 17%
  - UK: 17%, 17%
  - France: 15%, 15%
  - Germany: 14%, 14%
  - Japan: 4%, 4%

- **Netbook / Webbook:**
  - USA: 4%, 4%
  - UK: 6%, 6%
  - France: 6%, 6%
  - Germany: 5%, 5%
  - Japan: 5%, 5%

- **TabletPC / Slate / Pad:**
  - USA: 6%, 6%
  - UK: 4%, 4%
  - France: 6%, 6%
  - Germany: 5%, 5%
  - Japan: 6%, 6%

- **Handheld gaming device:**
  - USA: 13%, 13%
  - UK: 13%, 13%
  - France: 14%, 14%
  - Germany: 14%, 14%
  - Japan: 2%, 2%

- **eReader:**
  - USA: 2%, 2%
  - UK: 2%, 2%
  - France: 1%, 1%
  - Germany: 1%, 1%
  - Japan: 2%, 2%
Smartphone Ownership is on the Rise

Base: All respondents, n=2000 per country per wave
Q1: Which, if any, of the following devices do you currently use?
Q6: And which of the following best describes your phones?
Share of Feature Phones vs. Smartphones
Clear Consumer Shift from Feature Phones to Smartphones

Base: All respondents, n=2000 per country per wave
Q1: Which, if any, of the following devices do you currently use?
Q6: And which of the following best describes your phones?
* a mobile phone without PC-like capabilities but can access mobile-specific sites, has GPS, wallet-function and/or MP3 capabilities (only Japan)

Phase 1 (Jan+Feb 2011)  Phase 2 (Sept+Oct 2011)

Smartphone

Feature Phone

JP only
High-spec/Feature Phone*: W1: 72% W2: 65%
Daily Internet Usage on Smartphones

Consumers Increasingly Using Smartphones for Internet Access

Base: All main privately used smartphones
Q9: And how frequently do you use the Internet in general and specific services and types of websites on your smartphone?

<table>
<thead>
<tr>
<th>Country</th>
<th>Phase 1 (Jan+Feb 2011)</th>
<th>Phase 2 (Sept+Oct 2011)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>UK</td>
<td>50%</td>
<td>54%</td>
</tr>
<tr>
<td>France</td>
<td>41%</td>
<td>36%</td>
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<tr>
<td>Germany</td>
<td>39%</td>
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<tr>
<td>Japan</td>
<td>91%</td>
<td>88%</td>
</tr>
<tr>
<td>Overall</td>
<td>63%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Phase 1: Jan+Feb 2011
Phase 2: Sept+Oct 2011
Smartphone Users: Daily Internet Usage on Desktop or Laptop Computer

Smartphone Owners Continue to Access the Internet on their Computer

Base: All private smartphone users with PC or laptop
Q10: And how frequently do you use the Internet in general and specific services and types of websites on your computer?

Phase 1 (Jan+Feb 2011)
Phase 2 (Sept+Oct 2011)
Smartphone Users: Usage of Laptops, Desktops and Tablets

More Laptops than Desktop across all countries, Tablets gaining share

**Base:** All private smartphone users

**Q2a:** For which purposes do you use [device]? Displayed is private usage.

**Phase 2 (Sept+Oct 2011)**
Duration of Smartphone Usage

More Consumers are Long-Time Smartphone Owners

Base: All main privately used smartphones
Q8: How long have you been using your smartphone?
# Demographics of Smartphone Users - 1/2

**Base:** All private smartphone users

<table>
<thead>
<tr>
<th>Age</th>
<th>Wave 1</th>
<th>Wave 2</th>
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<th>Wave 2</th>
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<th>Wave 2</th>
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<tr>
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<tr>
<td>25 - 34 Years</td>
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<td>24%</td>
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<tr>
<td>45 - 54 Years</td>
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<td>17%</td>
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<td>19%</td>
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<td>55 + Years</td>
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<td>14%</td>
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<tr>
<td><strong>Average</strong></td>
<td>Ø 38,2</td>
<td>Ø 38,6</td>
<td>Ø 37,5</td>
<td>Ø 37,8</td>
<td>Ø 34,9</td>
<td>Ø 37,5</td>
<td>Ø 37,3</td>
<td>Ø 38,4</td>
<td>Ø 35,9</td>
<td>Ø 33,7</td>
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<table>
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<th>Wave 2</th>
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<tbody>
<tr>
<td>Female</td>
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<tr>
<td>Male</td>
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<th>Wave 2</th>
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<th>Wave 2</th>
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<tbody>
<tr>
<td>Low</td>
<td>32%</td>
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<td>24%</td>
<td>7%</td>
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</tr>
<tr>
<td>Middle</td>
<td>28%</td>
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<td>38%</td>
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<td>25%</td>
<td>24%</td>
<td>31%</td>
<td>32%</td>
<td>43%</td>
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<td>High</td>
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<td>35%</td>
<td>67%</td>
<td>69%</td>
<td>54%</td>
<td>51%</td>
<td>56%</td>
<td>39%</td>
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</table>

<table>
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<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
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<tbody>
<tr>
<td>Active (full + part time)</td>
<td>74%</td>
<td>71%</td>
<td>75%</td>
<td>73%</td>
<td>65%</td>
<td>68%</td>
<td>70%</td>
<td>73%</td>
<td>82%</td>
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<tr>
<td>Inactive</td>
<td>25%</td>
<td>29%</td>
<td>25%</td>
<td>26%</td>
<td>35%</td>
<td>32%</td>
<td>30%</td>
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<td>29%</td>
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Demographics of Smartphone Users - 2/2

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<th>Marital Status</th>
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<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone (US: Not married)</td>
<td>44%</td>
<td>49%</td>
<td>44%</td>
<td>45%</td>
<td>43%</td>
<td>38%</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Together (US: Married)</td>
<td>55%</td>
<td>51%</td>
<td>55%</td>
<td>55%</td>
<td>56%</td>
<td>62%</td>
<td>59%</td>
<td>59%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Household size</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Person</td>
<td>13%</td>
<td>14%</td>
<td>9%</td>
<td>11%</td>
<td>16%</td>
<td>16%</td>
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<td>19%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>2 Persons</td>
<td>22%</td>
<td>25%</td>
<td>30%</td>
<td>28%</td>
<td>29%</td>
<td>30%</td>
<td>32%</td>
<td>34%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>3 Persons</td>
<td>23%</td>
<td>23%</td>
<td>20%</td>
<td>23%</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
<td>20%</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td>4 Persons and more</td>
<td>42%</td>
<td>38%</td>
<td>41%</td>
<td>38%</td>
<td>37%</td>
<td>37%</td>
<td>31%</td>
<td>27%</td>
<td>55%</td>
<td>59%</td>
</tr>
<tr>
<td>Average</td>
<td>Ø 3,2</td>
<td>Ø 3,1</td>
<td>Ø 3,2</td>
<td>Ø 3,1</td>
<td>Ø 3,0</td>
<td>Ø 2,9</td>
<td>Ø 2,8</td>
<td>Ø 2,7</td>
<td>Ø 3,4</td>
<td>Ø 3,6</td>
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</table>

<table>
<thead>
<tr>
<th>Number of children</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 1</th>
<th>Wave 2</th>
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<td>57%</td>
<td>55%</td>
<td>64%</td>
<td>65%</td>
<td>56%</td>
<td>63%</td>
</tr>
<tr>
<td>1 Child</td>
<td>20%</td>
<td>17%</td>
<td>18%</td>
<td>18%</td>
<td>15%</td>
<td>18%</td>
<td>18%</td>
<td>17%</td>
<td>18%</td>
<td>12%</td>
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<td>2 Children</td>
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<td>19%</td>
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<td>13%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>3 Children and more</td>
<td>12%</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
<td>10%</td>
<td>8%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Average</td>
<td>Ø 1,0</td>
<td>Ø 0,8</td>
<td>Ø 0,8</td>
<td>Ø 0,8</td>
<td>Ø 0,8</td>
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<td>Ø 0,6</td>
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<td>Ø 0,7</td>
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<table>
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<tr>
<th>Household income</th>
<th>Wave 1</th>
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<th>Wave 1</th>
<th>Wave 2</th>
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<tbody>
<tr>
<td>Top</td>
<td>39%</td>
<td>40%</td>
<td>59%</td>
<td>51%</td>
<td>45%</td>
<td>42%</td>
<td>40%</td>
<td>29%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Middle</td>
<td>35%</td>
<td>31%</td>
<td>11%</td>
<td>11%</td>
<td>23%</td>
<td>17%</td>
<td>17%</td>
<td>14%</td>
<td>36%</td>
<td>28%</td>
</tr>
<tr>
<td>Low</td>
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<td>19%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
<td>6%</td>
<td>16%</td>
<td>14%</td>
<td>14%</td>
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<td>23%</td>
<td>35%</td>
<td>27%</td>
<td>43%</td>
<td>33%</td>
<td>36%</td>
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</table>

Base: All private smartphone users
<table>
<thead>
<tr>
<th>Background:</th>
<th>Research Design:</th>
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<tbody>
<tr>
<td>• The mobile internet is today’s main driver of growth in time spent online.</td>
<td>• Method: CATI interviews (random digital dial, fixed / mobile sample depending on country)</td>
</tr>
<tr>
<td>• Rapid consumer adaptation creates opportunities for businesses to engage with consumers.</td>
<td>• Target group: General population aged 18+ years</td>
</tr>
<tr>
<td>• Gaining deep insight into usage patterns provides the base and starting point of offering products, services as well as information satisfying true customer demands.</td>
<td>• Sample Size: n=2000 per country, representative of the population</td>
</tr>
</tbody>
</table>

**Research Objectives:**

• This survey is to measure the significance of mobile Internet usage on smartphones across the world.

• It accomplishes the mission of covering not only the digitally educated population – knowing what device they are using – but also users unaware of technical differences. The developed procedure is key to valid figures on a highly representative base.

• Use of brands and operating systems

• Internet usage behaviour, demographics