

2012 Mobile User Survey

Mobile User Preferences, Habits, and Expectations



Keynote Competitive Research

**leader in Internet and mobile
cloud monitoring**

Methodology

- Keynote Competitive Research, Keynote's Industry Analysis group, conducted a survey of 25-50 questions focused on mobile user habits and preferences designed to understand usage patterns and expectations.
- The survey included 5,388 panelists from the Keynote Research Panel
 - 3,145 were smartphone users
 - 1,976 were tablet users
- Survey conducted 1H of 2012

Key Insights on Mobile Device Usage

Smartphone Usage

- Android was the most popular operating system at 43%, followed by iOS at 37%
- 57% of users reported using a 3G service, with only 27% using 4G
- The **top three activities** performed on a **smartphone** were accessing **local information** (88%), **searching** for information (82%), and participating in **social media/networking** sites (76%)
- Smartphone users **preferred** to use **mobile apps** over mobile websites for map information, social media updates, e-mail, and banking information
- Users **preferred mobile websites** for **news, food/entertainment** info, **travel** info, shopping info, and **shopping**
- Two-thirds of smartphone users (64%) **want a site to load in less than 4 seconds**
- “Web page slow to load” top mobile frustration

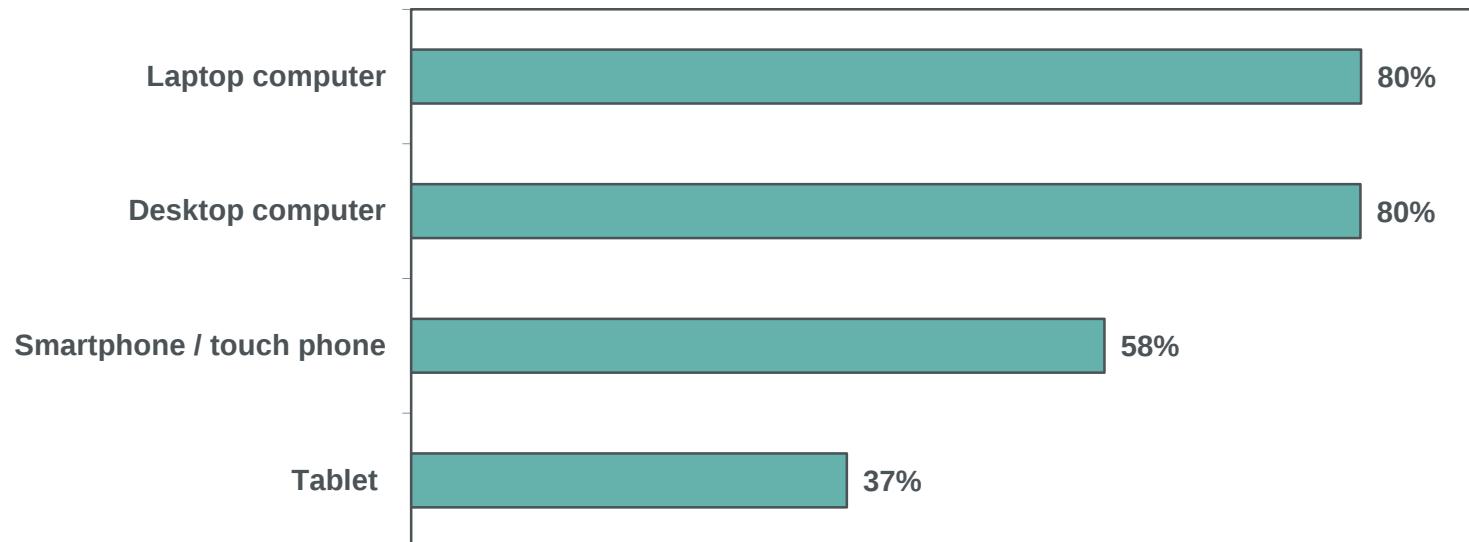
Key Insights

Tablet Usage

- Apple was the most common tablet brand at 53%, followed by the Amazon at 20% and Hewlett-Packard at 7%
- iOS beat out Android operating systems for tablets (43% to 35%)
- 77% of tablet users reported using Wi-Fi, versus 12% for 3G and 7% for 4G
- **Top activities** for **tablets** were to **read news** and entertainment, **search** for information, and watch **videos**
- Tablet users were mostly **indifferent** about choosing a **mobile app** or **mobile website** for their various activities
- 6 of 10 tablet users **want a sub-three second download**
- **“Web page slow to load”** top frustration

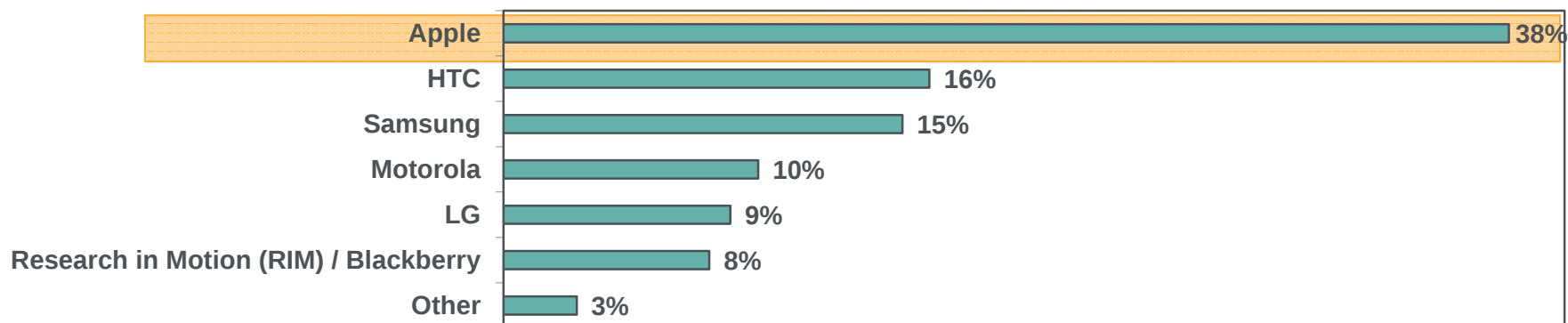
Device Distribution

Q2. Which of the following devices do you currently own? [Check all that apply]

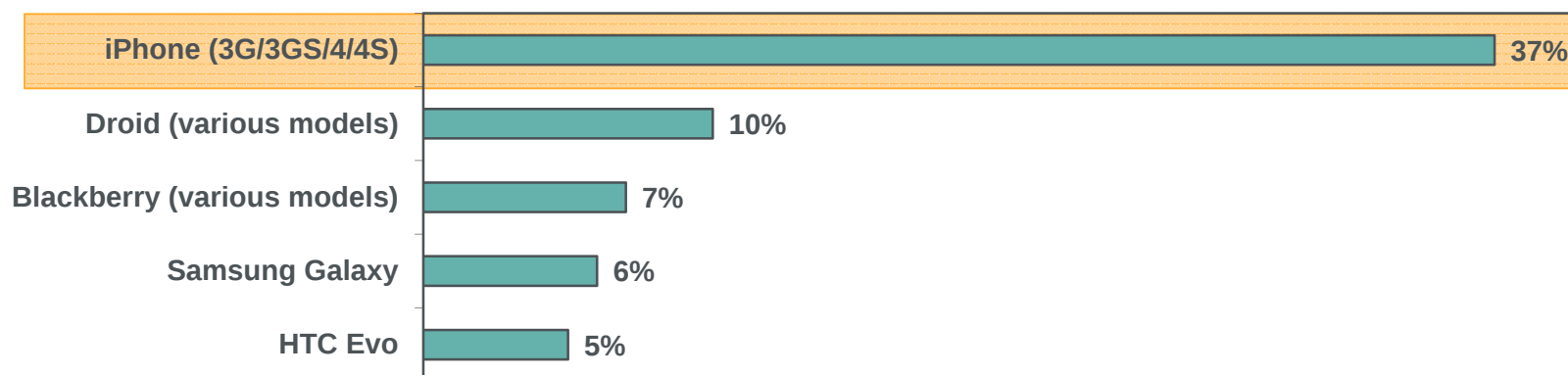


Smartphone Device Preferences

Q3. What brand is your smartphone / touch phone?

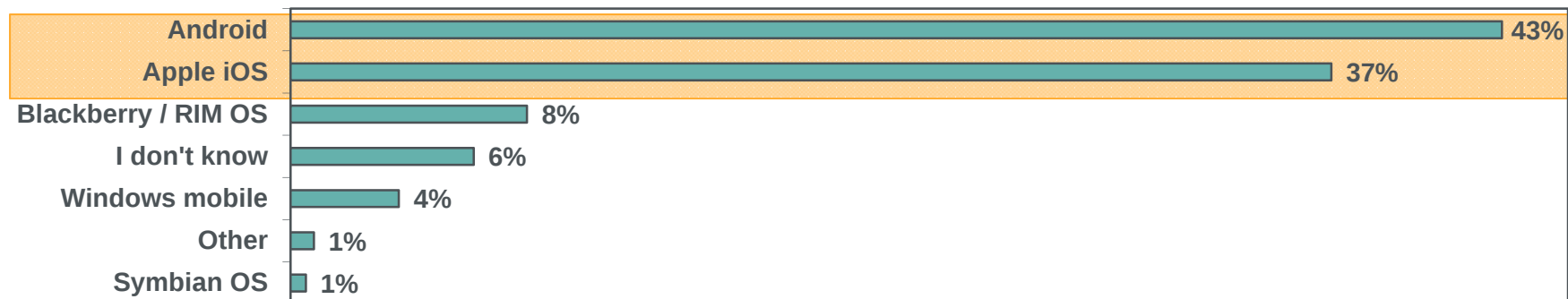


Q4. Specifically, what is the model name of your smartphone / touch phone?

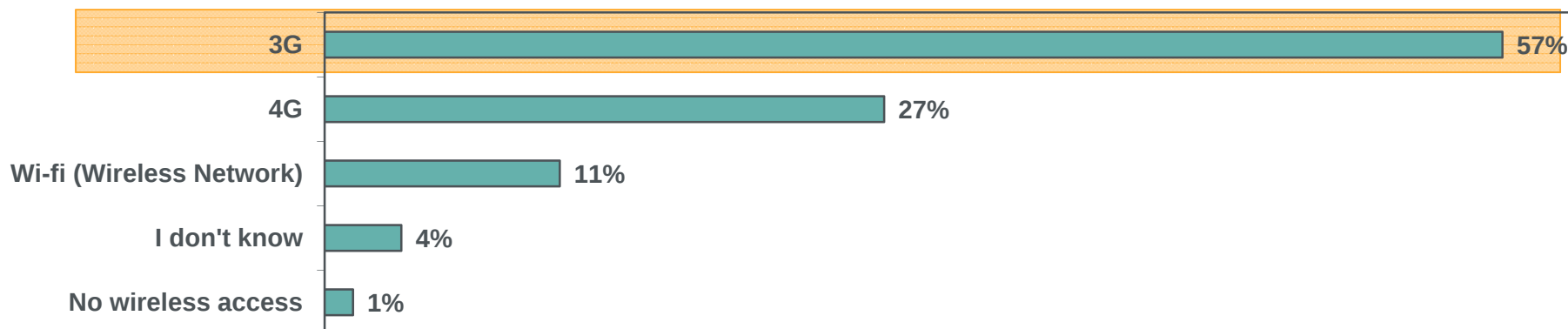


Smartphone OS and Wireless Access Preferences

Q5. What operating system does your smartphone / touch phone use?

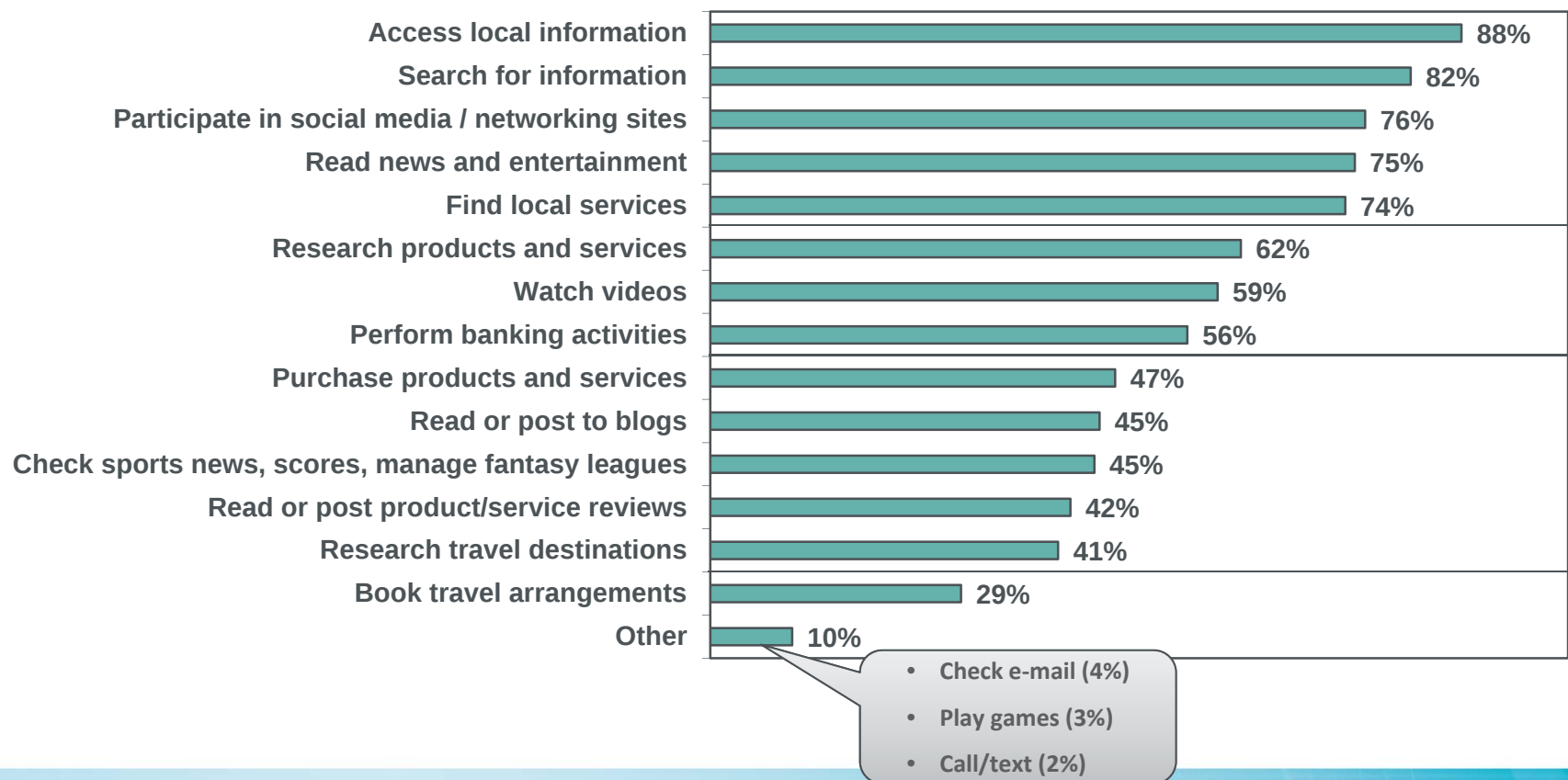


Q6. What kind of wireless data access do you currently have for your smartphone / touch phone?



Smartphone User Habits – Activity Preferences

*Q7. Which of the activities below do you typically perform on your smartphone / touch phone?
[Check all that apply]*



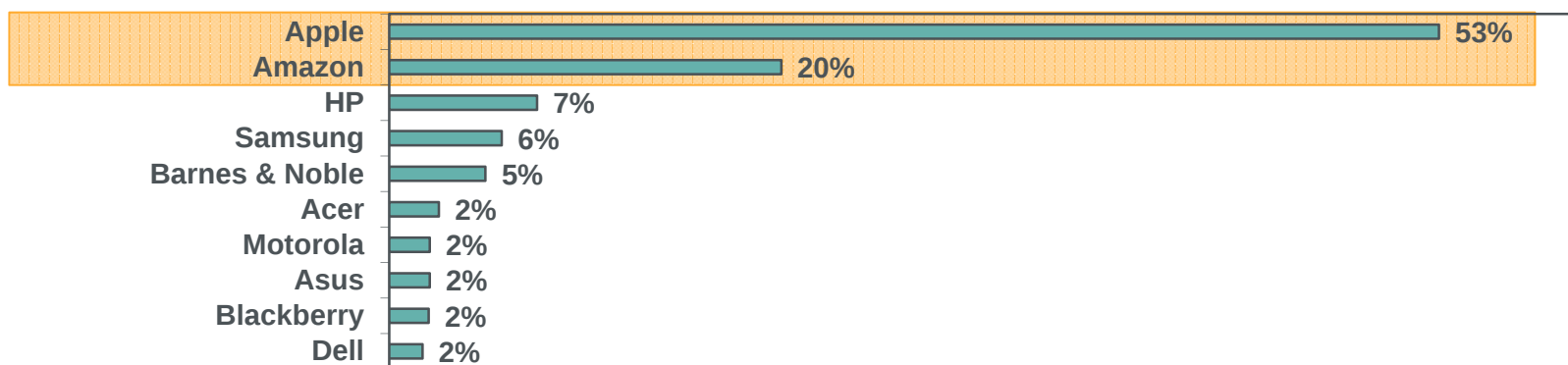
Smartphone Interaction Preferences

Q8-Q16. How do you prefer to access / interact with the following from your smartphone / touch phone?

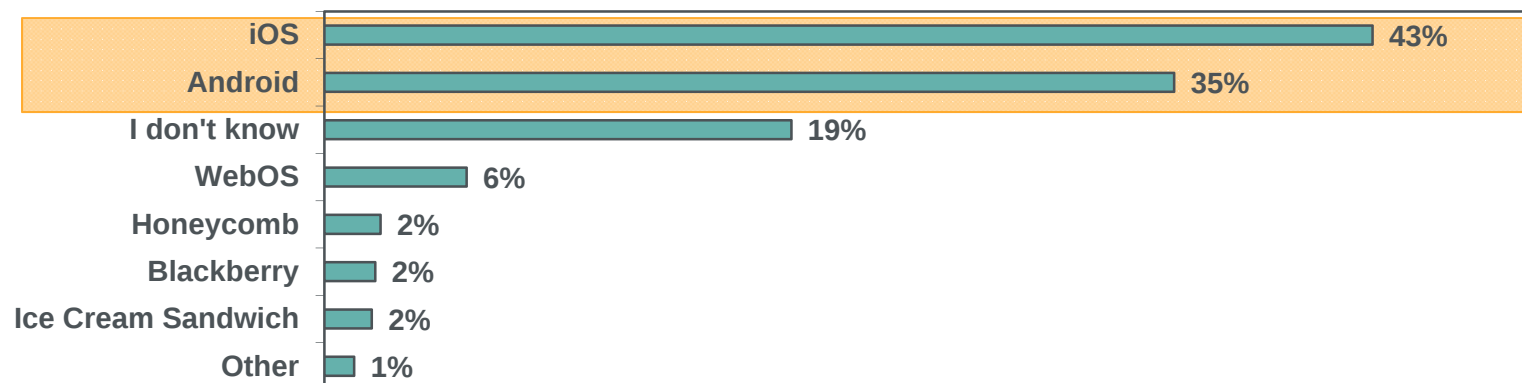
	Mobile app	Mobile website	Either mobile app or mobile website	I do not use my phone for this activity
Map information	50%	13%	30%	6%
Social media updates	46%	12%	26%	16%
E-mail	41%	19%	33%	7%
Banking information	30%	15%	22%	33%
News	24%	27%	40%	10%
Food / entertainment information	18%	27%	46%	10%
Travel information	17%	25%	39%	20%
Shopping	14%	23%	40%	22%
Product information	11%	35%	42%	13%

Tablet Brand and Operating System Preferences

Q17-1. What brand is your tablet?

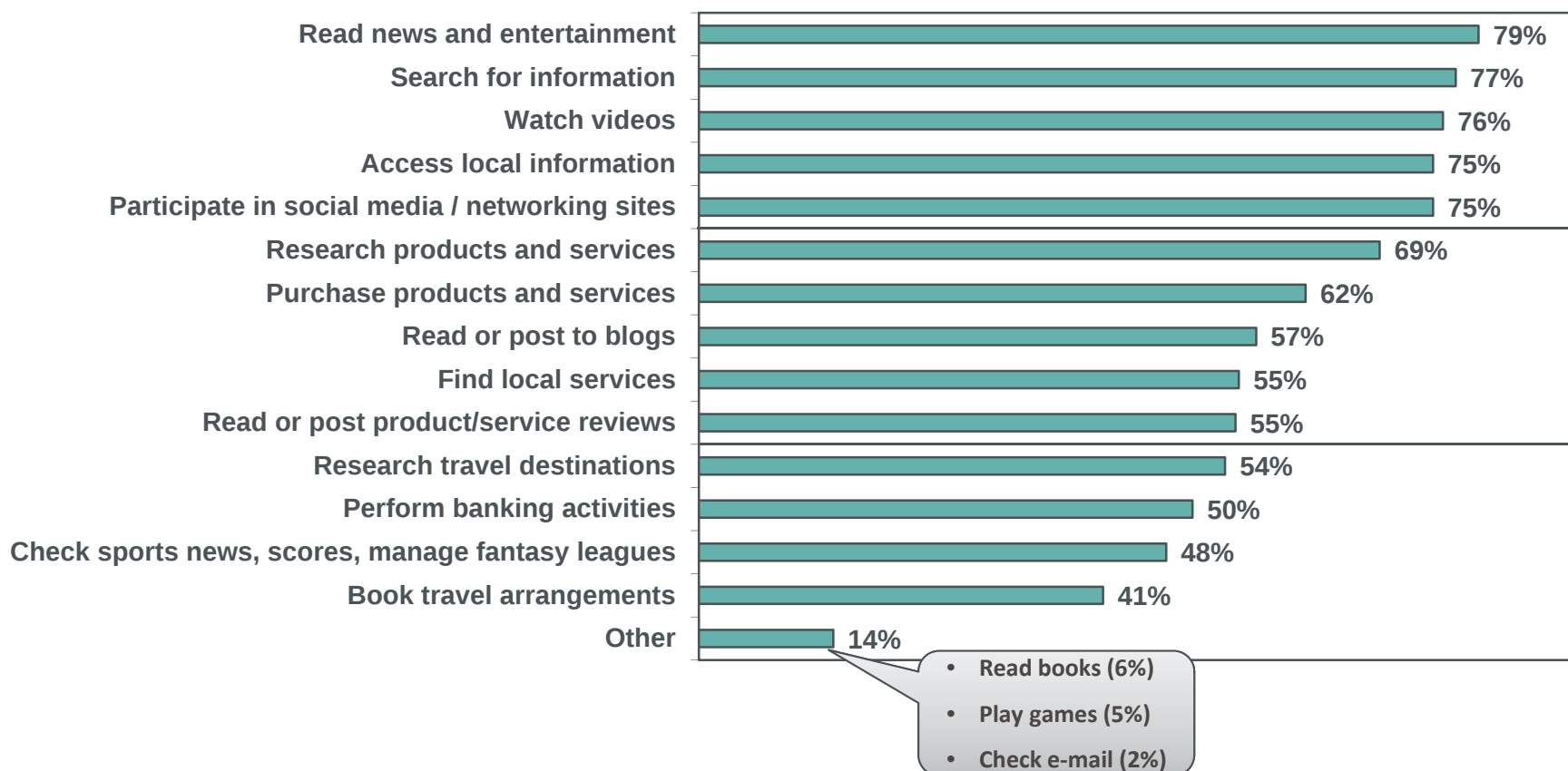


Q17-2. What operating system does your tablet(s) use?



Tablet User Habits – Activity Preferences

Q19. Which of the activities below do you typically perform on your tablet? [Check all that apply]



Tablet Interaction Preferences

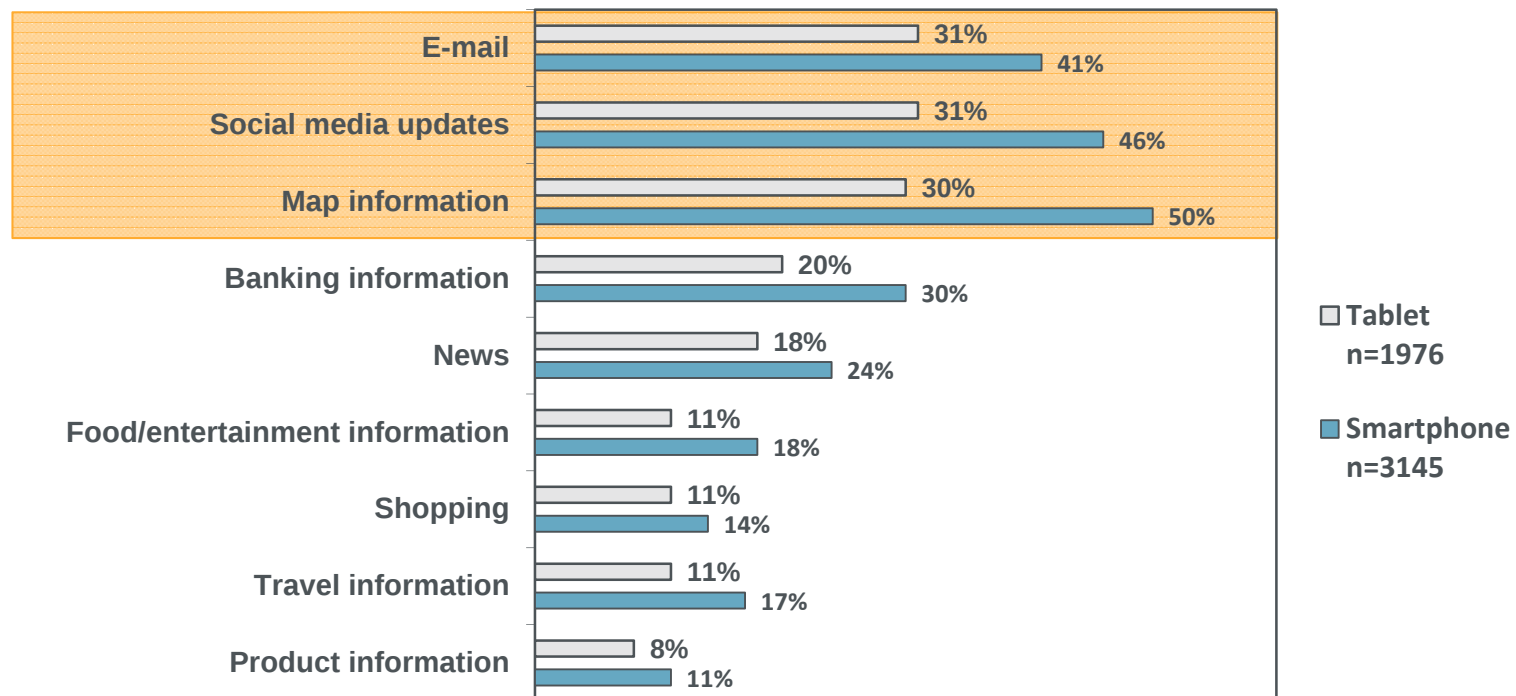
Q20-Q28. How do you prefer to access / interact with the following from your tablet?

	Mobile app	Mobile website	Either mobile app or mobile website	I do not use my tablet for this activity
E-mail	31%	22%	36%	10%
Social media updates	31%	18%	36%	15%
Map information	30%	18%	38%	13%
Banking information	20%	20%	27%	32%
News	18%	26%	47%	9%
Food / entertainment information	11%	29%	47%	12%
Shopping	11%	29%	45%	16%
Travel information	11%	28%	43%	18%
Product information	8%	34%	47%	10%

Smartphone vs. Tablet: Usage Preferences

Q8-Q16: How do you prefer to access / interact with the following from your smartphone / touch phone?

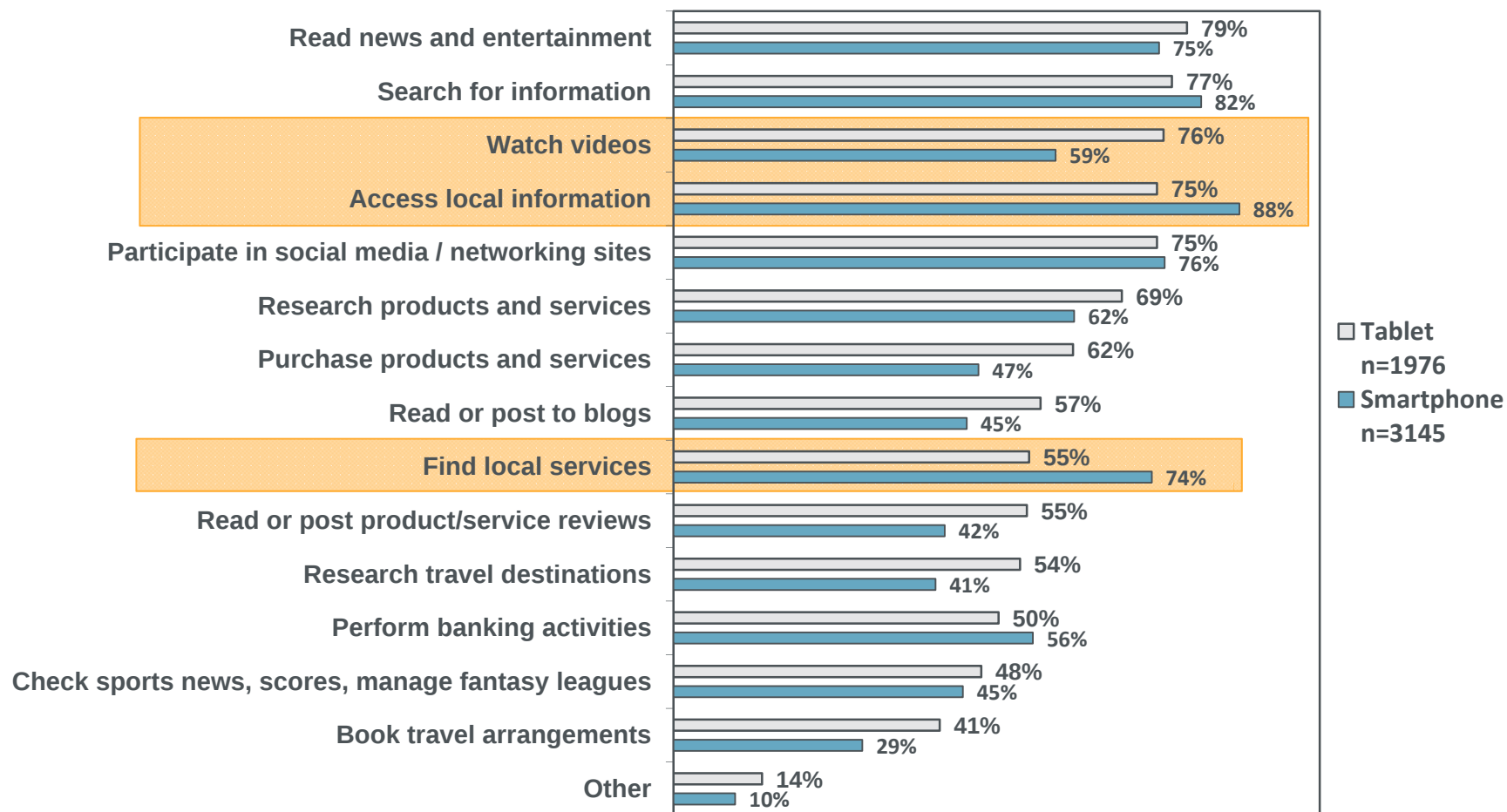
Q20-Q28: How do you prefer to access / interact with the following from your tablet?



% of users who answered "Mobile Apps" in Q8-16 (Smartphone) or Q20-28 (Tablet)

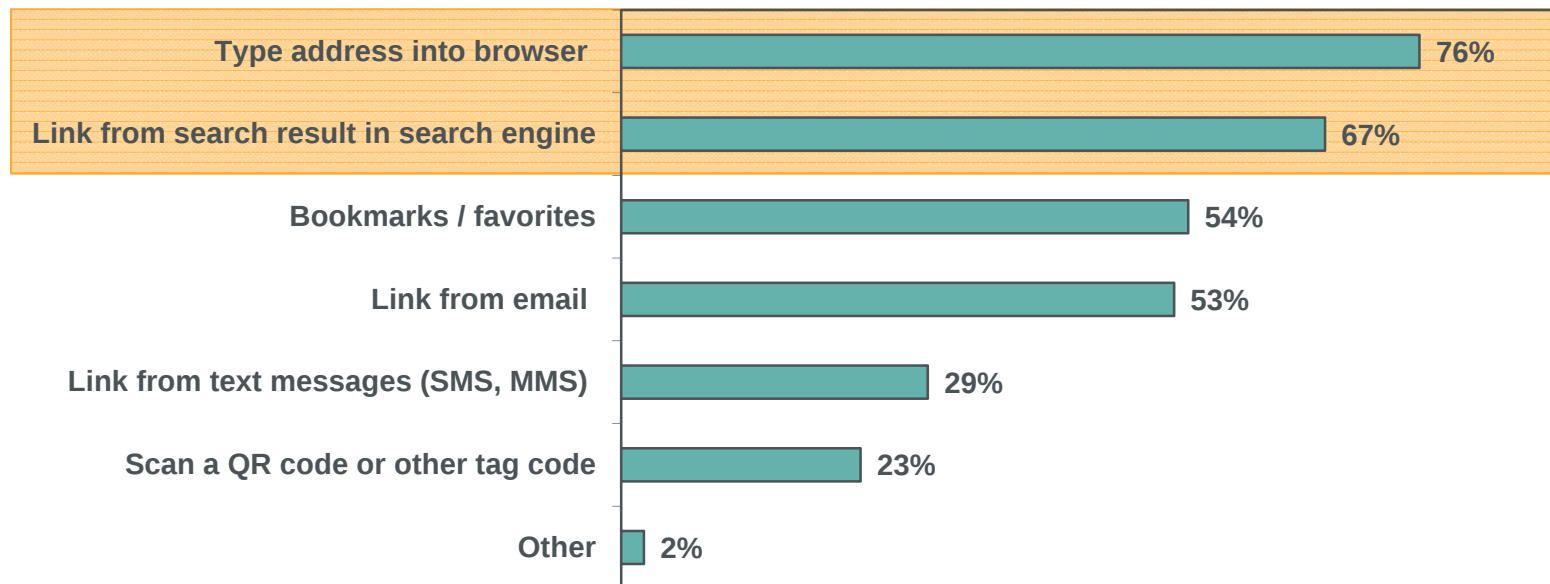
Smartphone vs. Tablet - Activities Comparison

Q19. Which of the activities below do you typically perform on your tablet? [Check all that apply]



Website Access Preferences

Q29. How do you typically access a websites on either your smart phone or tablet? [Check all that apply]



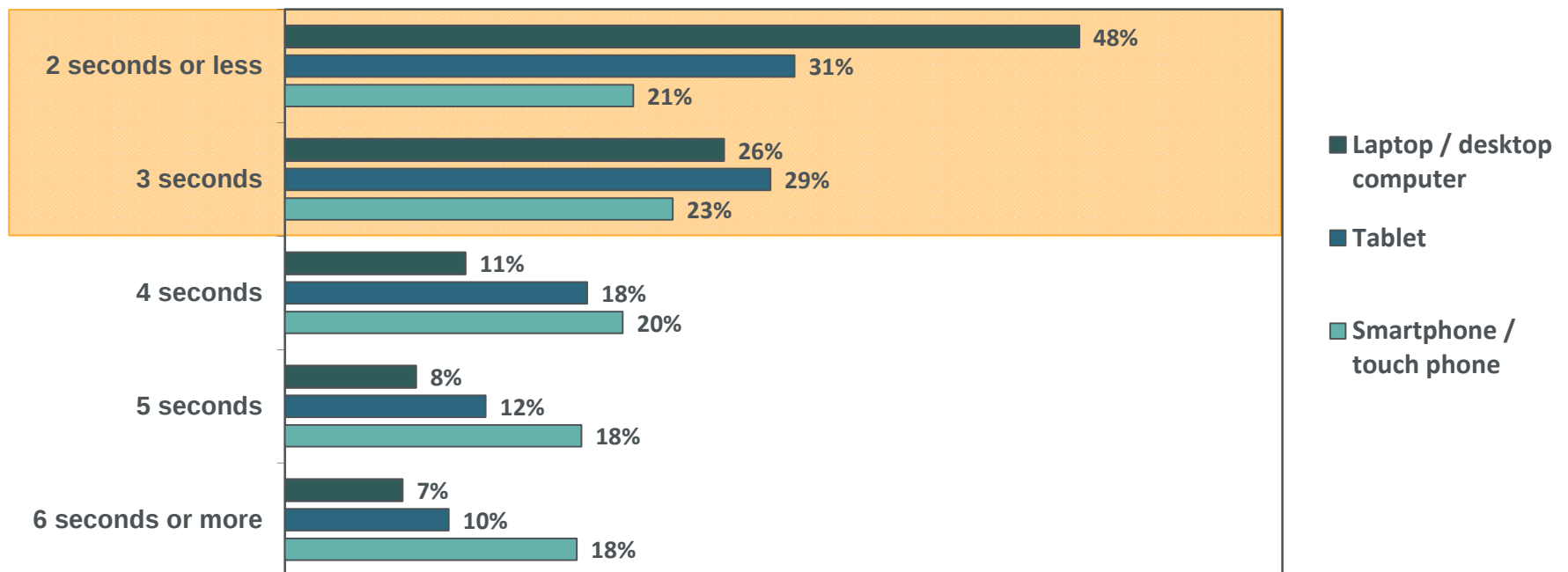
Average Time Spent Browsing / Using Apps via Mobile Devices

Q30-Q33. On average, how much time per day do you spend on the following?

	Browsing the Web from a mobile phone n=3432	Browsing the Web from a tablet n=2293	Browsing the Web from a home computer n=5290	Using mobile apps (applications) n=3542
Less than 1 hour	60%	45%	14%	45%
1 - 2 hours	29%	37%	34%	39%
3 - 4 hours	7%	12%	28%	10%
5 - 6 hours	2%	4%	11%	3%
More than 6 hours	2%	3%	13%	2%

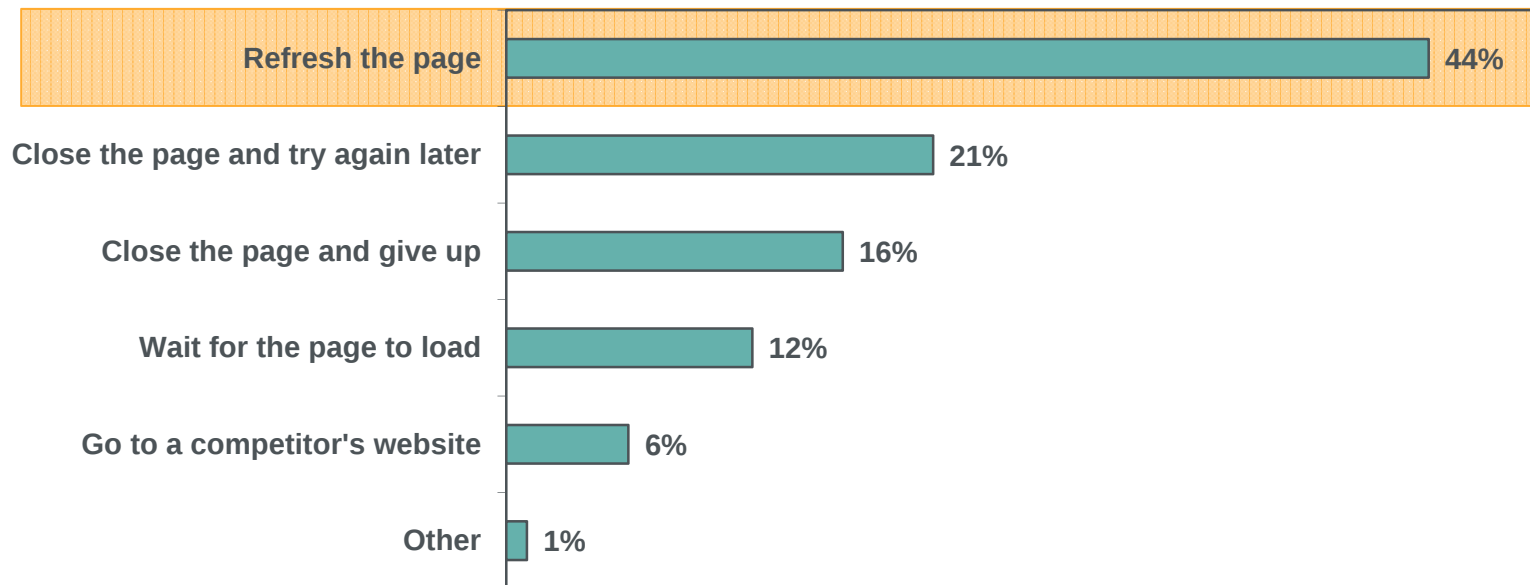
Mobile Device Website Loading Expectations

Q36. How long would you expect to wait for a webpage to load while using the following devices?



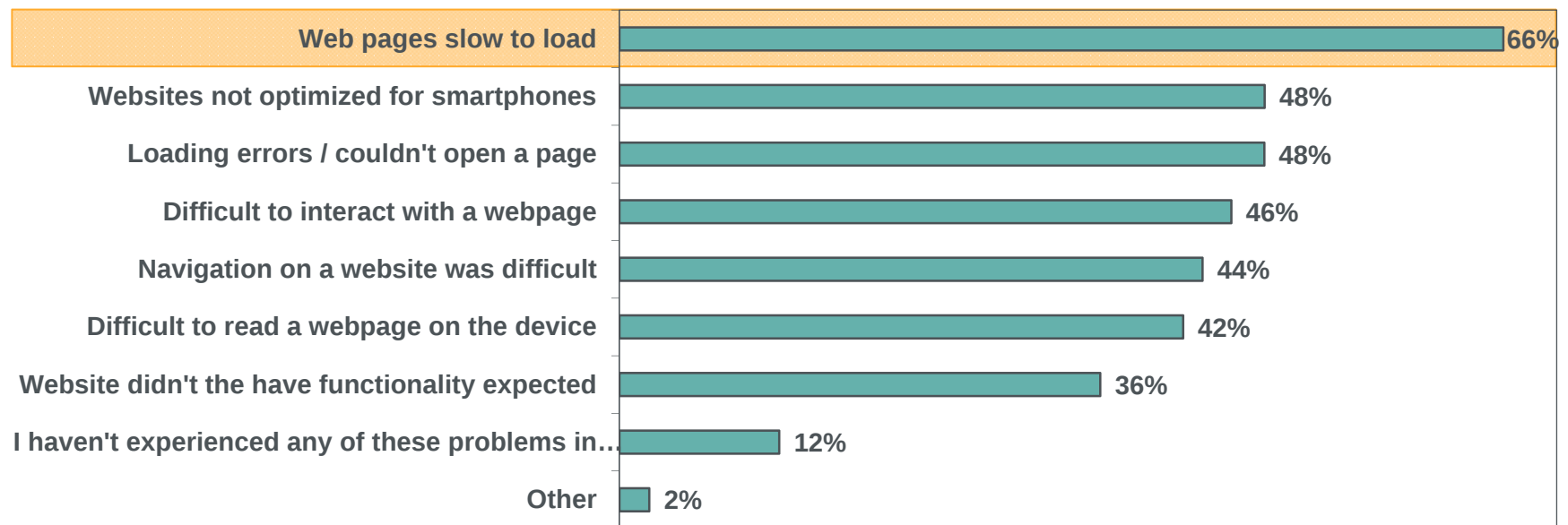
Mobile Webpage Load Time Reactions

Q37. If a mobile webpage took too long to load, what would you typically do?



Mobile Website Problems and Frustrations

Q38. Which of the following problems / frustrations have you experienced in the last 3 months while using your smartphone and / or tablet? [Check all that apply]

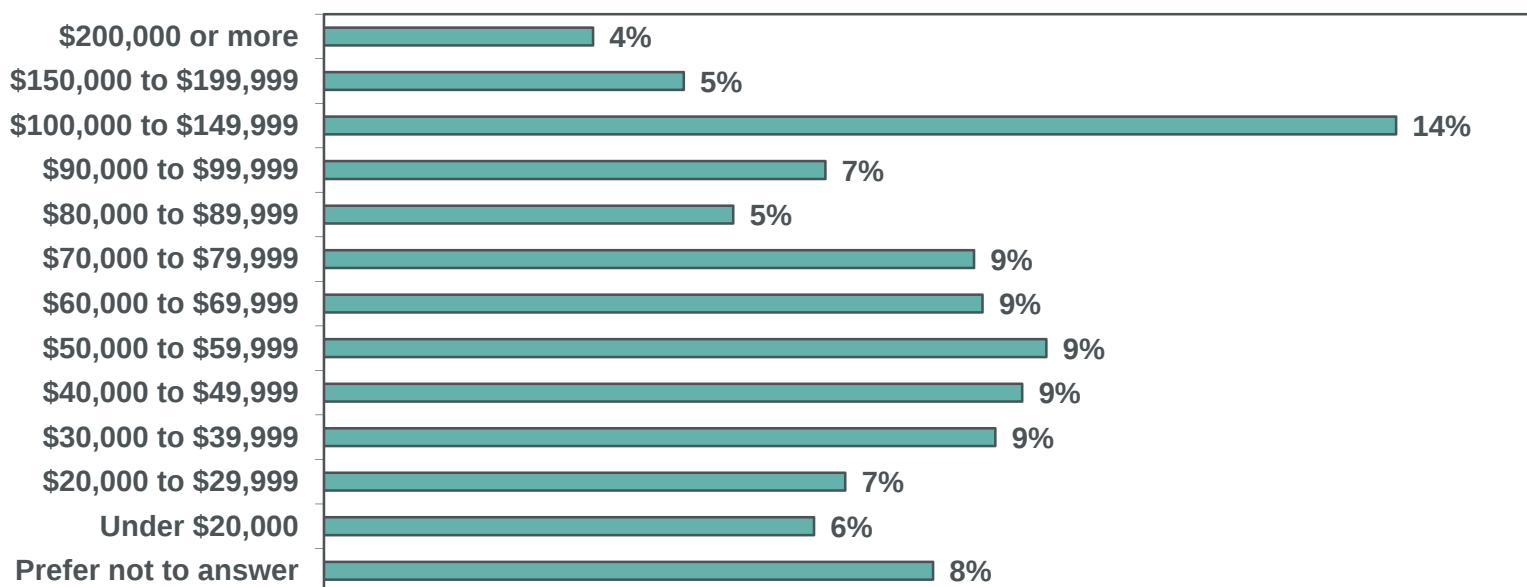


Mobile User Survey Demographics

Appendix

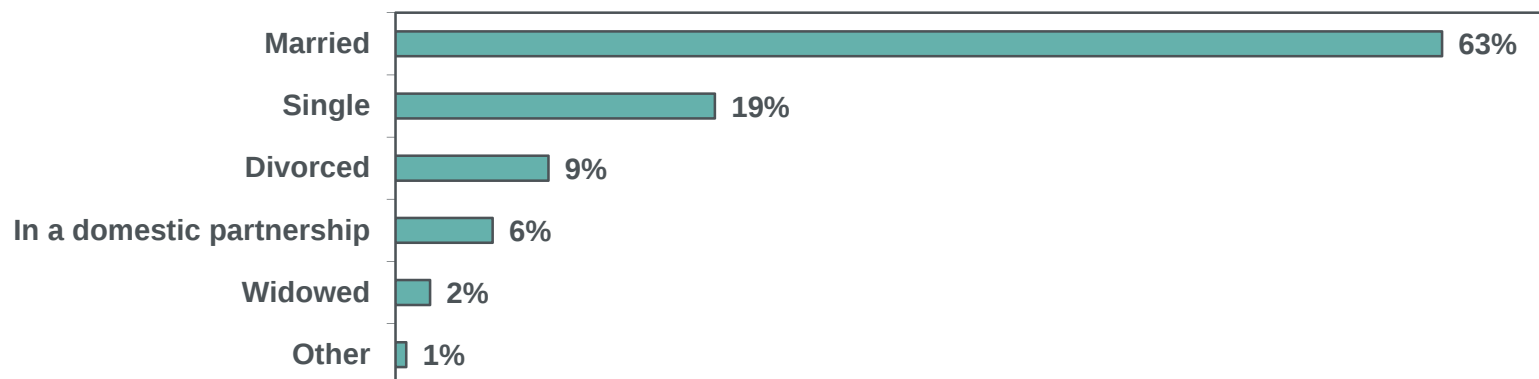
Demographics – Annual Household Income

Q42. Which of the following categories contains your Annual Household Income?



Demographics – Marital Status and Ethnic Background

Q43. What is your marital status?

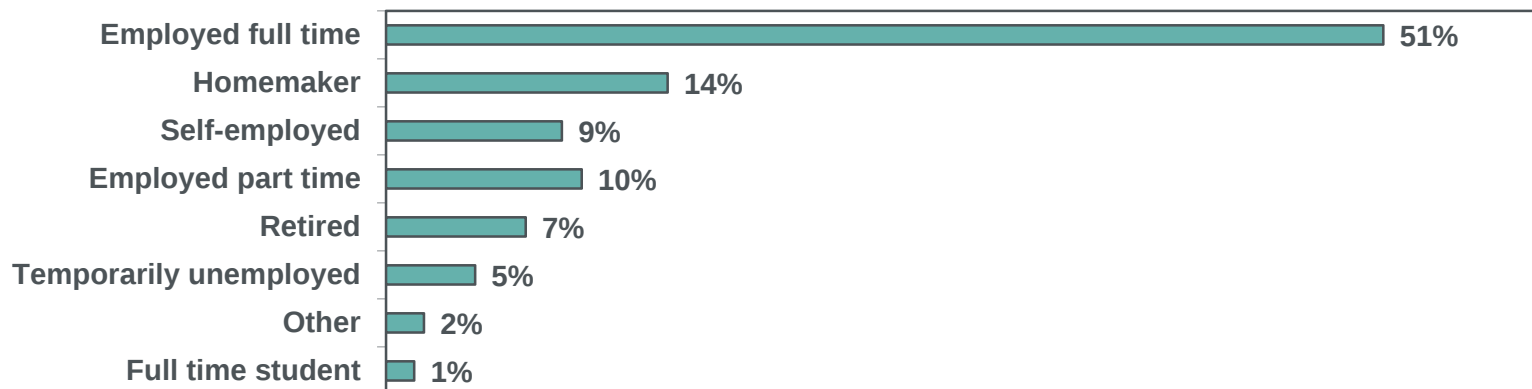


Q44. Which of the following best describes your ethnic background?



Demographics – Employment Status and Education

Q45. Which of the following best describes your current employment status?



Q46. What is the highest level of education that you have completed?

