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**SYNOPSIS**

**360 View:** Mobility and the App Economy provides a comprehensive analysis of the market for mobile data services. It features an overview of the mobile phone market including trends in smartphone and tablet adoption, device OS, and ARPs and explores the current mobile data plans used by subscribers as well as their ideal mobile data plan. The desired mobile data limit, number and types of devices, and number of people using the plan are all specifically assessed. It also analyzes app usage on smartphones, including time spend by app genre and app expenditures, and assesses the emerging smart watch product category.

**ANALYST INSIGHT**

“Consumers are showing strong demand for unsubsidized handsets, and their choice of handset is having a notable impact on their mobile data use. Those using iPhones have more robust usage and higher ARPs. This presents both opportunities and challenges for operators, handset makers, and OS providers to work together to further encourage and monetize mobile data use.”

— John Barrett, Director, Consumer Analytics, Parks Associates
Mobility and the App Economy

About the Research

Previous Research

- Smartphones: King of Convergence (3rd Edition) (Q1/14)
- Lifetime Value of Mobile Subscribers (Q4/13)
- Optimization and Monetization of Mobile Data Traffic (Q3/13)
- Digital Lifestyle: U.S. (Q2/13)
- Connected CE: 2012 Year in Review (Q1/13)

Key Findings

Recommendations

Adoption of Mobile Devices

- Smartphone and Tablet Adoption (2010 – 2014)
- Brand of Tablet Owned (2011 – 2014)
- % of U.S. Broadband Household Owning Smartphones, Tablets, or Both (2011 - 2014)
- Smartphone Operating System (2011 - 2014)
- Smartphone OS by Household Income (2012 - 2014)
- Smartphone OS by Education Level (2012 - 2014)

Use of Wireless Service

- Wireless Carrier Market Share (2011 - 2014)
- Average Monthly Wireless Service Cost by Carrier (2011 - 2014)
- Average Monthly Wireless Service Cost by Smartphone OS (2012 - 2014)
- Smartphone OS by Wireless Carrier - AT&T (2011 - 2014)
- Smartphone OS by Wireless Carrier - Verizon (2011 - 2014)
- Smartphone OS by Wireless Carrier - Sprint (2011 - 2014)
- Smartphone OS by Wireless Carrier - T-Mobile (2011 - 2014)
- Likelihood of Making Changes to Mobile Services (Q1/14)
- Likelihood of Switching to a New Wireless Service Provider by Current Provider (Q1/14)
- Likelihood of Canceling Mobile Service by Provider (Q1/14)
- Likelihood of Downgrading Mobile Service by Provider (Q1/14)
- Likelihood of Upgrading Mobile Service by Provider (Q1/14)
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Current Mobile Data Plan
- Use of Smartphone Data Plan (Q1/14)
- Use of Smartphone Data Plan by Service Provider (Q1/14)
- Mobile Data Plan by Smartphone OS (Q1/14)
- Data Plan Sharing Between Devices (Q1/14)
- Data Plan Sharing Between Devices by Service Provider (Q1/14)
- Devices Sharing Mobile Data Plan by Service Provider (Q1/14)

Preferred Mobile Data Plan
- Choice Preferences when Exceeding Data Limit (Q1/14)
- Preferences for Smartphone & Plan Pricing Features (Q1/14)
- Preferences for Smartphone & Plan Pricing Features by Income (Q1/14)
- Preferences for Smartphone & Plan Pricing Features by Provider (Q1/14)
- Data Plan Preferences: Shared Plan vs. Individual Plan (Q1/14)
- Data Plan Preferences by Service Provider (Q1/14)
- Data Plan Preferences for Device Coverage (Q1/14)
- Data Plan Preferences for Device Coverage by Device Ownership (Q1/14)
- Data Plan Preferences for Device Coverage by Income (Q1/14)
- Data Plan Preferences for Device Coverage by Service Provider (Q1/14)
- Preferences for Multi-Device Data Plan Limits (Q1/14)
- Ideal Mobile Data Plan (Q1/14)
- Ideal Mobile Data Plan by Single vs. Multiple Devices Covered (Q1/14)
- Ideal Mobile Data Plan by Desire for Shared Data Plans (Q1/14)
- Ideal Mobile Data Plan by Smartphone OS (Q1/14)

Mobile App Ecosystems
- Mobile App Usage (Q1/14)
- Average Number of Apps Purchased by Household Income (Q1/14)
- Smartphone App Downloads by Smartphone OS (Q1/14)
- Monthly Use of Smartphone Apps by Smartphone OS (Q1/14)
- Monthly Number of Apps Purchased by Smartphone OS (Q1/14)
- Tablet App Downloads by Tablet Operating System (Q1/14)
- Monthly Use of Tablet Apps by Tablet Operating System (Q1/14)
- Number of Tablet Apps Purchased by Tablet Operating System (Q1/14)
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- Average Spending on Mobile App Purchases (Q1/14)
- Average Spending on Smartphone App Purchases by Income (Q1/14)
- Average Spending on Tablet App Purchases by Children at Home (Q1/14)
- Monthly Expenditure for Smartphone Apps by Smartphone OS (Q1/14)
- Monthly Expenditure for Tablet Apps by Tablet Operating System (Q1/14)
- In-App Purchases on Smartphones or Tablets (Q1/14)
- % Spending on In-App Purchases on Smartphones by Smartphone OS (Q1/14)
- Average Expenditure on In-App Purchases (Q1/14)
- Average Expenditure on In-App Purchases on Smartphone by Smartphone OS (Q1/14)
- % Spending on In-App Purchases on Tablets by Tablet OS (Q1/14)
- Top Discovery Methods for Smartphone Apps (Q1/14)
- Top App Selection Criteria (Q1/14)

Mobile App Ecosystems: Usage Patterns

- Use of Mobile App: Smartphones vs. Tablets (Q1/14)
- Type of Mobile App Used by Smartphone OS (Q1/14)
- Type of Tablet App Used by Tablet Operating System (Q1/14)
- Time Spent on Smartphone Apps (Q1/14)
- Times Spent Weekly on Smartphone App Types by Age (Q1/14)
- Time Spent Weekly on Smartphone App Types by Gender (Q1/14)
- Time Spent Weekly on Smartphone Apps by Smartphone OS (Q1/14)
- Time Spent Weekly on Smartphone Apps by Service Provider (Q1/14)
- Time Spent Weekly on Smartphone Apps by Brand of New Phone Purchased (Q1/14)
- Average Minutes Using Smartphone Apps in Individual Sittings (Q1/14)
- Average Minutes Using Smartphone Apps: iPhone vs. Android Phones (Q1/14)

Wearable Computing Devices

- Consumer Electronics Purchases Made in 2013 (Q1/14)
- Smart Watch Brands Purchased (Q1/14)
- Smart Watch Purchase Price (Q1/14)
- Smart Watch Purchase Price and Occasion (Q1/14)
- Intention to Purchase a Smart Watch (Q1/14)
- Smart Watches: 2013 Purchase vs. Purchase Intention (Q1/14)

Additional Research from Parks Associates