International Smartphone Study

Hannu Verkasalo
COIN Event 27.02.2007
Nokia’s SP360 research has acquired data from five different countries, most extensively from Finland. In Finland the collaboration includes…

- Nokia
- TKK / COIN project
- TeliaSonera
- Elisa
- DNA Finland

- A pioneering method of doing empirical research in the mobile market!
- Lots of accurate international early-adopter data available
- 2 M.Sc. theses, 1 Lic.Sc. thesis, 1 journal paper and 4 conference papers published
- Doctoral dissertations under work
  - Automation of data mining
  - Longitudinal and cross-country comparisons
  - Adoption studies
  - Role of challenger services (e.g. Internet) and radio access (e.g. WLAN)
Research Method is Nokia’s Invention

The client SW is transparent to the panelist. Client SW observes applications and services usage on the device and makes a daily datalog.

Data transfer is automatic. Application uploads data daily. Datalogs are sent compressed and encrypted over packet data / Internet link.

Data in servers is anonymous. Each panelist is identified by an anonymous person ID. Aggregated and anonymous raw data is used for reporting.
Voice and SMS Still Drive Usage of Smartphones!

Only the most common (highest coverage) services experience frequent usage (high usage frequency).

Offline multimedia playback, imaging, browsing and MMS have all attracted more than 60% of smartphone users! Smartphones are getting closer to computers!
Finland Lags Other Markets – Bundling is not Irrelevant

Bundled Finnish subscriptions have taken steps towards the leading markets:
- More capable handsets (3G)
- Bundling of data + voice plans (pricing)
- Subsidized handset price
- Better marketing and promotion

Base: USA + Europe 2005-2006
The Mobile Internet is Coming – USA Leads

Mean Traffic / Month / User

- Finland 2006: 6.4 MB
- Finland 2005: 2.0 MB
- France 2006: 9.8 MB
- Germany 2005-2006: 6.6 MB
- UK 2005-2006: 5.3 MB
- USA 2005: 12.4 MB

Usage of Mobile Internet Services

- Email: Americans dominate in email and other Internet services (IM, Internet portals). Strong legacy of the Internet and operator strategies might drive usage!
- Internet Services: Base: 2,424 panelists

- Finland 2006: 16%
- France 2006: 23%
- Germany 2005-2006: 24%
- UK 2005-2006: 29%
- USA 2005: 35%

Finland has caught up in packet data usage! Data plans seem to be the main driver…

Base: 2,424 panelists