# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Background, Objectives and Methodology</td>
<td>4</td>
</tr>
<tr>
<td>Key Highlights</td>
<td>5</td>
</tr>
<tr>
<td>Device Ownership</td>
<td>9</td>
</tr>
<tr>
<td>Smartphone Type and Use</td>
<td>11</td>
</tr>
<tr>
<td>Smartphone Apps</td>
<td>18</td>
</tr>
<tr>
<td>Use of Smartphone for Payment</td>
<td>21</td>
</tr>
<tr>
<td>Importance of Smartphone</td>
<td>25</td>
</tr>
</tbody>
</table>
INTRODUCTION
Background, Objectives & Methodology

• iamota and Insights West partnered to conduct a study on Smartphone use among British Columbians.
• The specific objectives of the study were to measure:
  o Overall Smartphone use and behavior;
  o Smartphone attitudes and relationship;
  o Device techno- graphic information;
  o Attitudes towards marketers use of mobile; and
  o Participation and attitudes towards m-commerce.

• The Smartphones Study was conducted online with Your Insights panelists from June 1<sup>st</sup> to 4<sup>th</sup>, 2013.
  o A total of 849 residents of BC, aged 18+ participated in the study
    ▪ A sample of this size has a margin of error of +/-3.2%, 19 times out of 20.
  o 540 smartphone owners were included among the respondents.
    ▪ A sample of this size has a margin of error of +/-4.2%, 19 times out of 20.

• The data has been statistically weighted according to Canadian census figures for BC for age, gender, and region.
Key Highlights
**Key Highlights**

**Majority of British Columbians Own Smartphones**
- 64% currently own a Smartphone.
- 22% plan on upgrading their non-Smartphone to a Smartphone in the next year.

**Most Use their Smartphones Frequently**
- Average active use is 1.7 hours per day.
- Majority (62%) estimate that they check their device at least hourly.
  - A compulsive 6% believe they check every 10 minutes.

**Consumers take to mobile for a huge range of activities**
- Beyond using their Smartphone as a telephone or for texting, most also use their device for a wide variety of other activities.
- Smartphone owners have an average of 27 apps.
  - 43% have 25 or more apps on their device.

**Key Insight:**
- The Smartphone market in BC has DOUBLED in the past two years, and is poised for even further growth.

**Key Insight:**
- Smartphone usage approaching TV viewing and Internet usage #’s, suddenly elevating the medium significantly in a short period of time.

**Key Insight:**
- As use and comfort with mobile grows, Smartphones are likely to become more ingrained in users’ lives and the preferred device for more activities.
Key Highlights Continued

Smartphone Owners are Dedicated to their Devices

- One in five (18%) consider themselves “addicted” to their smartphone—27% among 18-34 year-olds.
  - 3% consider their addiction “unhealthy”.
- Three-quarters (76%) would return home to retrieve their smartphone if they left without it.
  - 31% would travel 10 minutes or more to pick up their device.
- When given a series of “small sacrifices”, only 30% would chose to “lose” their smartphone for 3 days.
  - 56% would rather give up Facebook; and
  - 17% would rather get stood up on a date.

Key Insight:

- Device ‘stickiness’/loyalty is unlike any other. ‘Addicted’ users represent a special segment.

Smartphones Play a Significant Role in Social Media Use

- 62% access social media at least weekly with their smartphone.
  - Just over half (54%) use their Smartphone to access Twitter more than any other device.
  - Over one-third (36%) use their Smartphone to access Facebook more than any other device.

Key Insight:

- Social media and smartphone use are growing hand in hand, and a number of social media sites (Instagram, Vine) are now designed specifically with these devices in mind.
Smartphones Play a Budding Role in Direct Purchases and Purchase Making Decisions

• 50% have made a purchase directly through their smartphone (up from 8% two years ago), most often (40%) using an app.
  o 34% have used an app with an authorized connection to their credit card.
• 28% are likely to make a purchase using their smartphone in the next three months, and 40% look forward to a day when they can make more purchases directly through their smartphone.
• Most use their device to research products/services (69%) and search for nearby retail stores/services (65%) at least monthly.

Smartphone owners today expect good mobile experiences from brands and businesses

• 79% expect a good mobile experience from the brands they trust, like and engage with.
• 54% are more likely to do business with brands and companies who are thoughtful and surprising with the mobile experiences they provide.
• 54% think less of brands with poor mobile websites

Key Insight:
• Mobile purchases are gaining traction and there is an appetite for more m-commerce providing organizations can make it easy and secure for consumers.

Key Insight:
• Providing customers with a high quality and engaging mobile experience has moved from a “nice to have” to a “need to have” for brands in today’s marketplace.
Device Ownership
### Device Ownership

<table>
<thead>
<tr>
<th>Device</th>
<th>18 - 34</th>
<th>18 - 34</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital camera (non-Smartphone)</td>
<td>83%</td>
<td>81%</td>
</tr>
<tr>
<td>Home phone/landline</td>
<td>71%</td>
<td>44%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>64%</td>
<td>86%</td>
</tr>
<tr>
<td>iPod or other MP3 player</td>
<td>55%</td>
<td>74%</td>
</tr>
<tr>
<td>PVR</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>iPad or other Tablet computer</td>
<td>42%</td>
<td>45%</td>
</tr>
<tr>
<td>Other wireless/cellphone</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>Nintendo Wii</td>
<td>31%</td>
<td>41%</td>
</tr>
<tr>
<td>eReader</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>Sony PlayStation 3</td>
<td>18%</td>
<td>31%</td>
</tr>
<tr>
<td>Microsoft Xbox 360</td>
<td>17%</td>
<td>30%</td>
</tr>
<tr>
<td>Nintendo Wii U</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>None of these</td>
<td>1%</td>
<td>-</td>
</tr>
</tbody>
</table>

Base: BC Residents (n=849)

Q1. Which of the following do you currently own?

36% plan to upgrade next year
Smartphone Type and Use
Smartphone Operating System and Wireless Carrier

Operating System

- Apple iOS: 48%
- Android: 40%
- Blackberry: 15%
- Windows: 4%
- Other: 1%
- Don’t know: 2%

Wireless Carrier

- TELUS: 38%
- Rogers: 27%
- Bell: 16%
- Fido: 12%
- Virgin: 5%
- Koodoo: 5%
- Wind Mobile: 2%
- Mobilicity: 1%
- Other: 3%

Base: Smartphone owners (n=540)

Q3. Which operating system does your Smartphone have? Q4. Which wireless carrier do you have for your Smartphone?
Q12. In an average week, how many hours do you spend actively using your Smartphone?

- 0 hours: 1%
- 1 to less than 7 hours: 40%
- 7 to less than 14 hours: 22%
- 14 to less than 21 hours: 21%
- 21 to less than 28 hours: 5%
- 28 hours or more: 11%

Average: 12 hours/week (1.7 hours/day)

More than 14 hours/week (2 hours/day): 27%

Base: Smartphone owners (n=540)
Number and Frequency of Daily Smartphone Checks

M13a. In an average day how many times do you think you check your Smartphone?

- More than every 10 minutes: 6%
- Every 10-14 minutes: 8%
- Every 15-29 minutes: 15%
- Every 30-59 minutes: 19%
- Every hour: 14%
- Every couple of hours: 24%
- Less often: 13%
- Don’t know: 1%

Q13b. During an average day, how frequently do you check your Smartphone?

- Average: 19 times
- Base: Smartphone owners (n=540)
Top Smartphone Activities

As a telephone (making/taking calls) 52% 30% 8% 91%
Texting 61% 19% 8% 88%
Sending/reading email 57% 14% 6% 77%
Searching for information 31% 25% 13% 69%
Taking pictures 17% 28% 23% 68%
Checking the weather 16% 32% 16% 64%
Accessing social media 43% 13% 7% 62%
Sending/receiving IM 33% 15% 7% 56%
Reading online news 20% 22% 10% 52%
Researching products or services 13% 21% 16% 50%
Playing games 16% 18% 12% 45%
Searching for nearby retail store/service 8% 18% 19% 45%

Q5. How often do you use your Smartphone for each of the following?

Multiple times/day  Multiple times/week  At least weekly

Base: Currently own device (n=varies)
Q5. How often do you use your Smartphone for each of the following?

- **Sharing/Posting photos**: 8% Multiple times/day, 18% Multiple times/week, 14% At least weekly
- **As a GPS/Search for maps/directions**: 5% Multiple times/day, 15% Multiple times/week, 17% At least weekly
- **Streaming videos/music/podcasts (not previously downloaded)**: 8% Multiple times/day, 13% Multiple times/week, 12% At least weekly
- **Online banking**: 5% Multiple times/day, 14% Multiple times/week, 12% At least weekly
- **Downloading (music/videos/podcasts)**: 7% Multiple times/day, 10% Multiple times/week, 7% At least weekly
- **Recording video**: 5% Multiple times/day, 10% Multiple times/week, 7% At least weekly
- **Sharing/Posting video**: 7% Multiple times/day, 7% Multiple times/week, 7% At least weekly
- **Video chat**: 6% Multiple times/day, 7% Multiple times/week, 16% At least weekly
- **Making a purchase online directly through your Smartphone**: 5% Multiple times/day, 12% At least weekly
- **Making a purchase in store directly through an app on your Smartphone**: 4% Multiple times/day, 9% At least weekly
- **Scanning QR Codes**: 5% Multiple times/day, 9% At least weekly
- **Online stock trading**: 7% Multiple times/day
# Device Used Most Often Among Social Media Users

<table>
<thead>
<tr>
<th></th>
<th>Facebook</th>
<th>Twitter</th>
<th>Instagram</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>36%</td>
<td>54%</td>
<td>79%</td>
</tr>
<tr>
<td>Laptop computer</td>
<td>31%</td>
<td>19%</td>
<td>8%</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>23%</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>iPad or other tablet</td>
<td>10%</td>
<td>11%</td>
<td>5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Pinterest</th>
<th>LinkedIn</th>
<th>Vine*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>24%</td>
<td>17%</td>
<td>80%</td>
</tr>
<tr>
<td>Laptop computer</td>
<td>36%</td>
<td>46%</td>
<td>10%</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>21%</td>
<td>30%</td>
<td>7%</td>
</tr>
<tr>
<td>iPad or other tablet</td>
<td>19%</td>
<td>7%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: Smartphone owners who use social media type (n=varies)

M6. Which one device do you use **most often** for accessing each of the following social media sites? If you don’t use any of these sites, please choose “don’t use” for all.

*Warning: very small base size, interpret with extreme caution*
Q10. How many apps do you currently have on your Smartphone?

Number of Apps Currently on Smartphone

- 0 apps: 3%
- 1 to less than 25 apps: 53%
- 25 to less than 50 apps: 26%
- 50 to less than 75 apps: 11%
- 75 or more apps: 6%

Average: 27 Apps

Base: Smartphone owners (n=540)
Types of Apps on Smartphone

- Weather: 76%
- Social media (Net): 76%
- Facebook: 70%
- Twitter: 38%
- Instagram: 22%
- LinkedIn: 15%
- GPS/maps/navigation: 75%
- Games: 70%
- Photo/video: 68%
- Utilities: 67%
- Music/audio: 62%
- Instant messaging: 48%
- News: 47%
- Banking/finance: 46%
- Entertainment: 34%
- Food/drinks/restaurants: 33%
- Movies: 33%
- Productivity: 33%
- Sports news/teams: 32%
- Health/fitness: 30%
- Books: 29%
- Reference: 28%
- Shopping/lifestyle: 26%
- Travel/tourism: 23%
- Business: 20%
- Coffee shop: 19%
- Education: 19%
- Passbook: 19%
- Traffic: 17%
- Medical: 13%
- Yoga: 6%
- Ski resort: 6%
- Other: 26%

Base: Have Apps on their Smartphone (n=523)
Q11. Which of the following apps or types of apps do you currently have on your Smartphone?
Use of Smartphone for Payment
Use of Smartphone for Payment

Q7. Which of the following have you ever used to pay for a purchase using your Smartphone?

A website accessed through Smartphone: 27%
An App: 40%
Calling in and providing credit card information via an automated answering service: 16%

Don’t know: 3%
None: 47%

Base: Smartphone owners (n=540)

Q8B. How did you pay for the purchases you made directly through your Smartphone?

Provided credit card/other payment info: 46%
App with authorized connection to credit card: 34%
PayPal: 29%
Credit card/other payment provided upon delivery: 26%
Store card saved somewhere on Smartphone: 22%
Apple Passbook: 7%
Google Wallet: 4%
Other: 1%

Base: Made payment with Smartphone (n=220)

Statistically significantly higher than other group(s)
Bought Using Smartphone in Past 3 Months

Q8A. In the past three months, which of the following have you bought directly using your Smartphone?

- Items from a website viewed on your mobile phone: 20%
- Parking (through call in or an app): 18%
- Coffee or tea etc. (through a Starbucks or other coffee shop app): 15%
- Movie tickets (through a Cineplex Scene or other theater app): 14%
- Other: 3%
- None: 59%

Base: Smartphone owners (n=540)
Q8. How likely are you to make a payment with your Smartphone in the next three months?

Q9. What would encourage you to use your Smartphone more often for purchases?
Importance of Smartphone
### Relationship to Phone

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>An unhealthy addiction</td>
<td>3%</td>
</tr>
<tr>
<td>A strong addition, but manageable</td>
<td>15%</td>
</tr>
<tr>
<td>Not addicted, but it's very important in my life</td>
<td>43%</td>
</tr>
<tr>
<td>It's a useful device, but I'm not attached to it</td>
<td>31%</td>
</tr>
<tr>
<td>I could do with or without it</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Addicted:** 18%

**Base:** Smartphone owners (n=540)

Q16. How would you characterize your relationship with your Smartphone?
Q14. If, after leaving home for the day, you realized that you had forgotten your Smartphone at home, how far would you travel to go back home and get it?

- Less than 5 minutes: 23%
- 5 to less than 10 minutes: 22%
- 10 to less than 15 minutes: 12%
- 15 to less than 30 minutes: 11%
- 30 minutes or more: 8%
- I wouldn’t go back to get it: 24%

Would return home: 76%
Less than 15 min.: 58%
## Preference of Smartphone Loss for 3 Days Vs. Other Sacrifice

<table>
<thead>
<tr>
<th>Sacrifice</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give up Facebook for 3 days</td>
<td>56%</td>
</tr>
<tr>
<td>Have your computer Internet be down for 3 days</td>
<td>19%</td>
</tr>
<tr>
<td>Get stood up on a date</td>
<td>17%</td>
</tr>
<tr>
<td>Lose your driver's license</td>
<td>10%</td>
</tr>
<tr>
<td>Minor fall down the stairs (no broken bones but some scrapes and bruises)</td>
<td>9%</td>
</tr>
<tr>
<td>Get into a minor car accident</td>
<td>5%</td>
</tr>
<tr>
<td>None, rather lose my Smartphone</td>
<td>30%</td>
</tr>
</tbody>
</table>

Prefer multiple sacrifices to losing Smartphone: **26%**

Base: Smartphone owners (n=540)

Q17. Would you rather lose your Smartphone for 3 days or have one of the following happen?