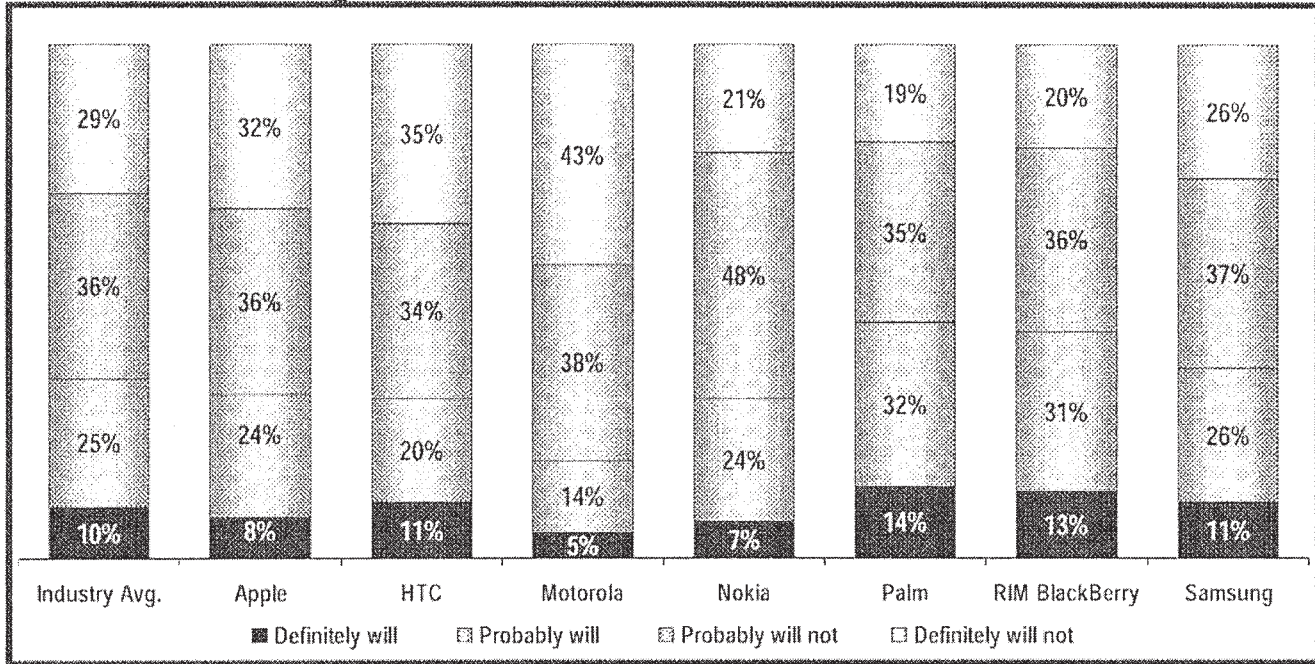
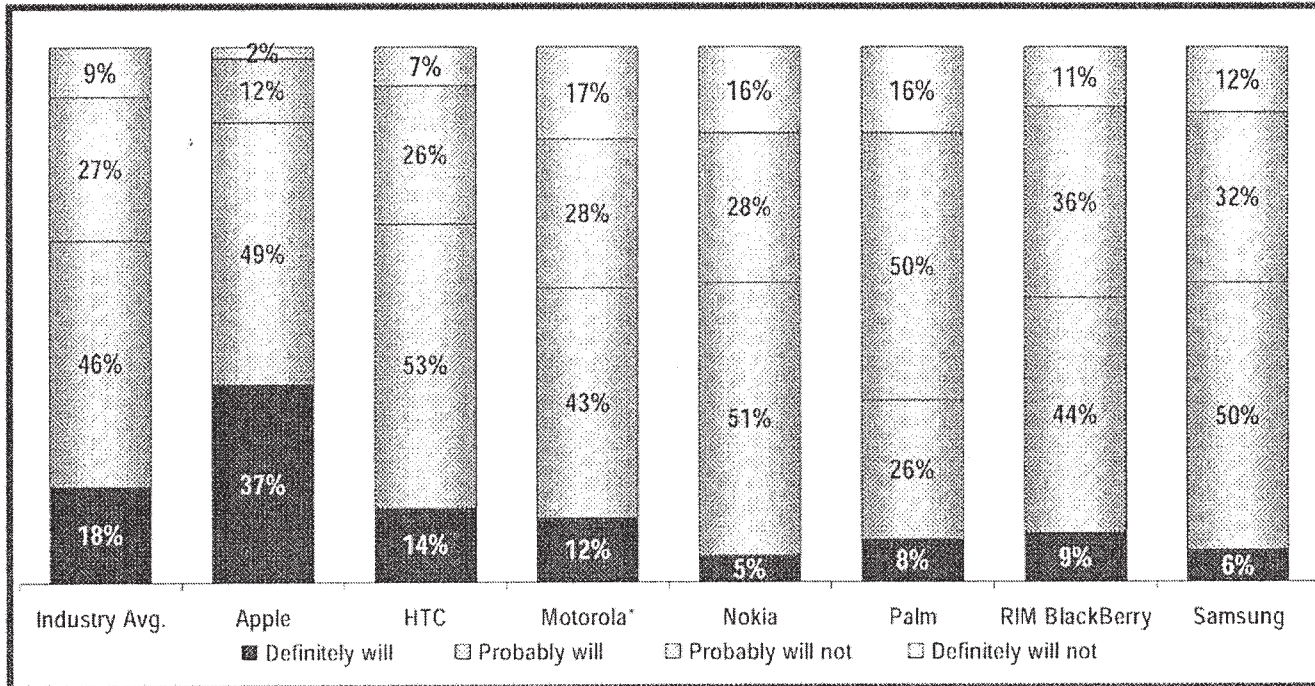




Future Purchasing¹ Likelihood—Manufacturers 2011 Vol. 1



Repurchase Likelihood of Current Brand—2011 Vol. 1



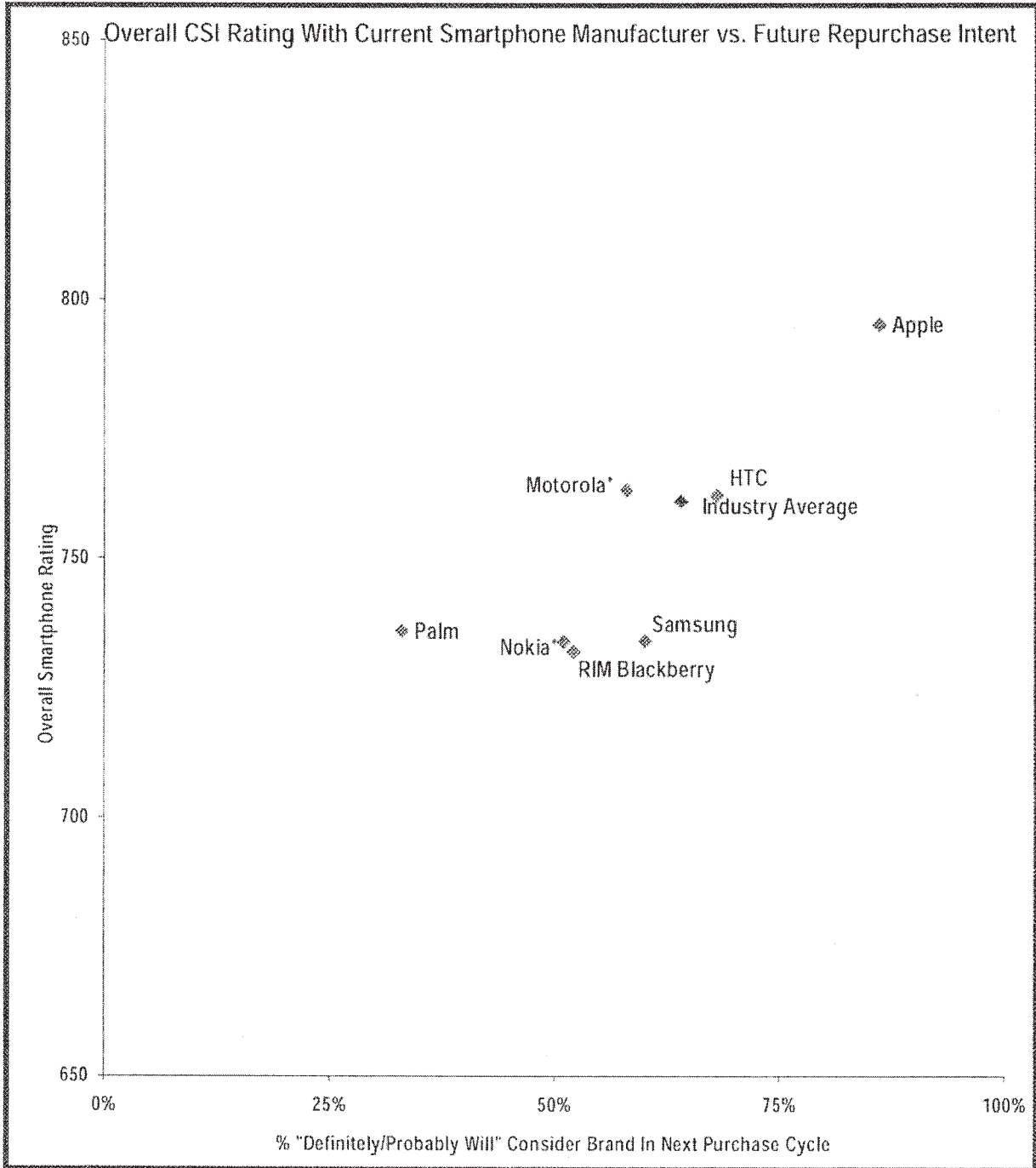
¹ Intent to purchase a new cell phone in the next 6 months.

*Caution: small sample size.

¹ For handsets used for less than 2 years.



Repurchase Likelihood and Overall Satisfaction

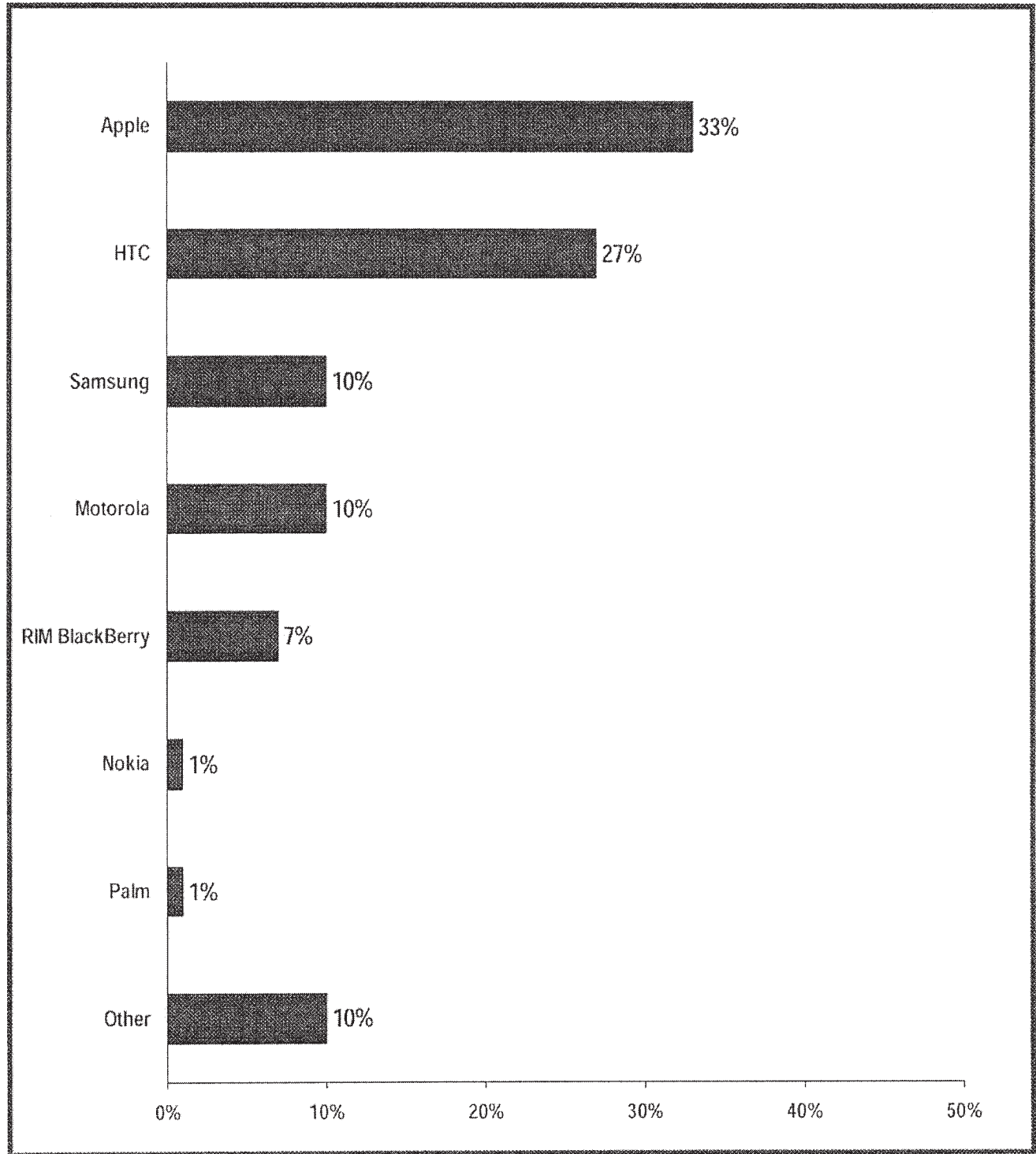


*Caution: small sample size.

Note: Based to those having owned their handset for less than 2 years.



Smartphone Future Consideration Set

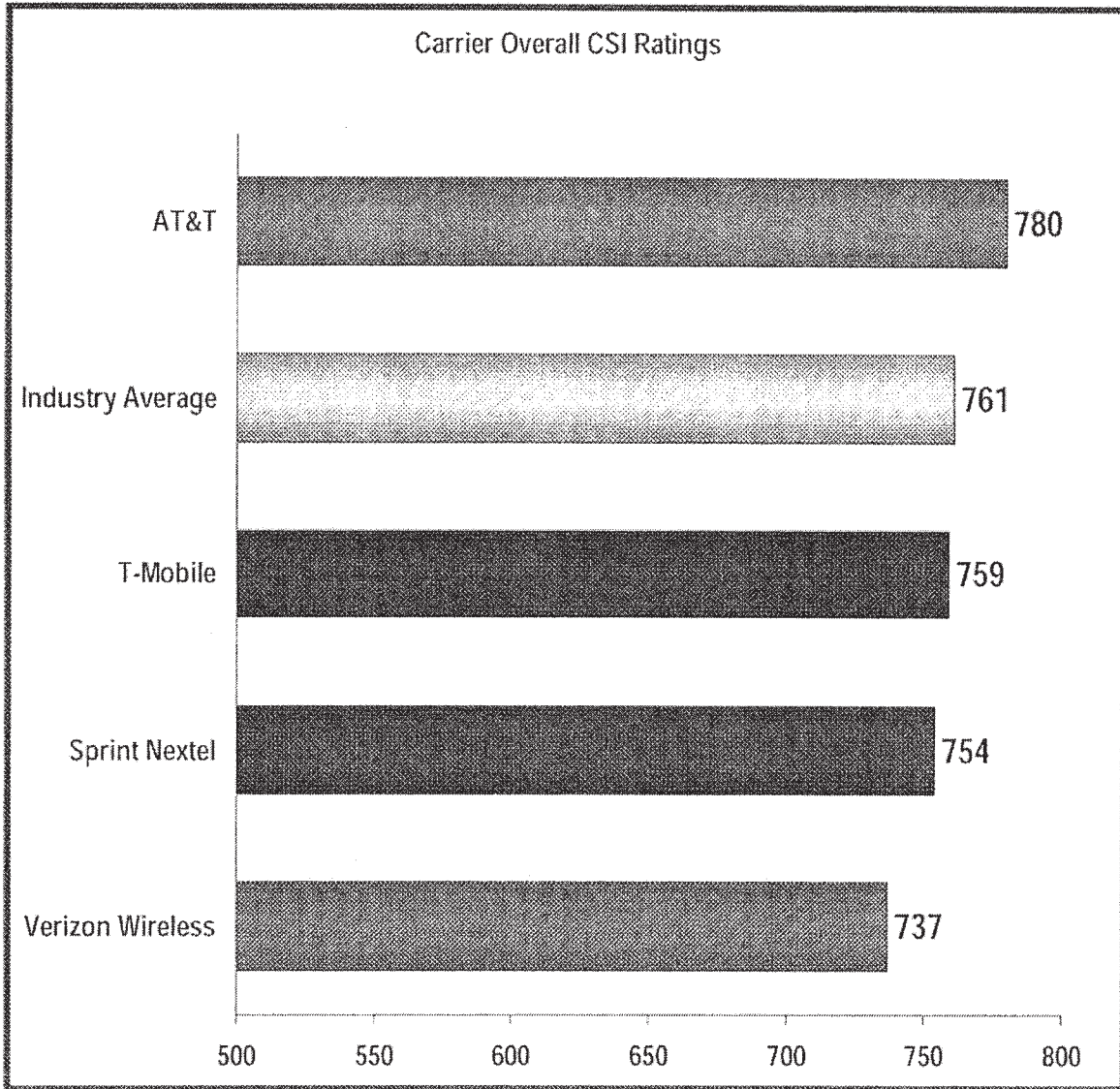




Smartphone CSI Ratings By Carrier



Overall Smartphone CSI Ratings by Carrier

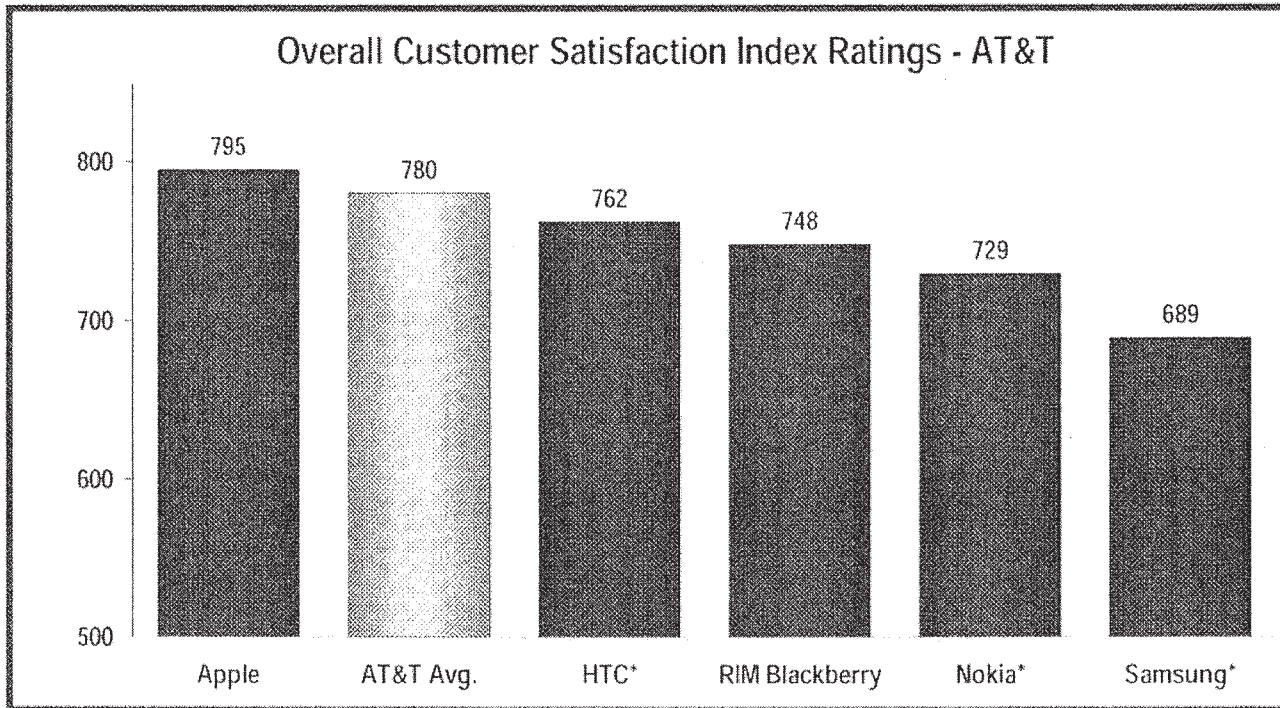


For handsets used for less than 2 years.

- = Significantly ABOVE Industry Average at 95% Confidence Level
- = Significantly BELOW Industry Average at 95% Confidence Level



Smartphone CSI Ratings by Carrier—AT&T



	AT&T Avg.	Apple	HTC*	RIM Blackberry	Nokia*	Samsung*
Overall	780	795	762	748	729	689
Ease of Operation	808	826	776	768	749	712
Operating System	751	769	732	710	682	647
Physical Design	815	831	796	779	765	729
Features	797	821	781	734	716	679
Battery Function	642	619	672	739	724	648

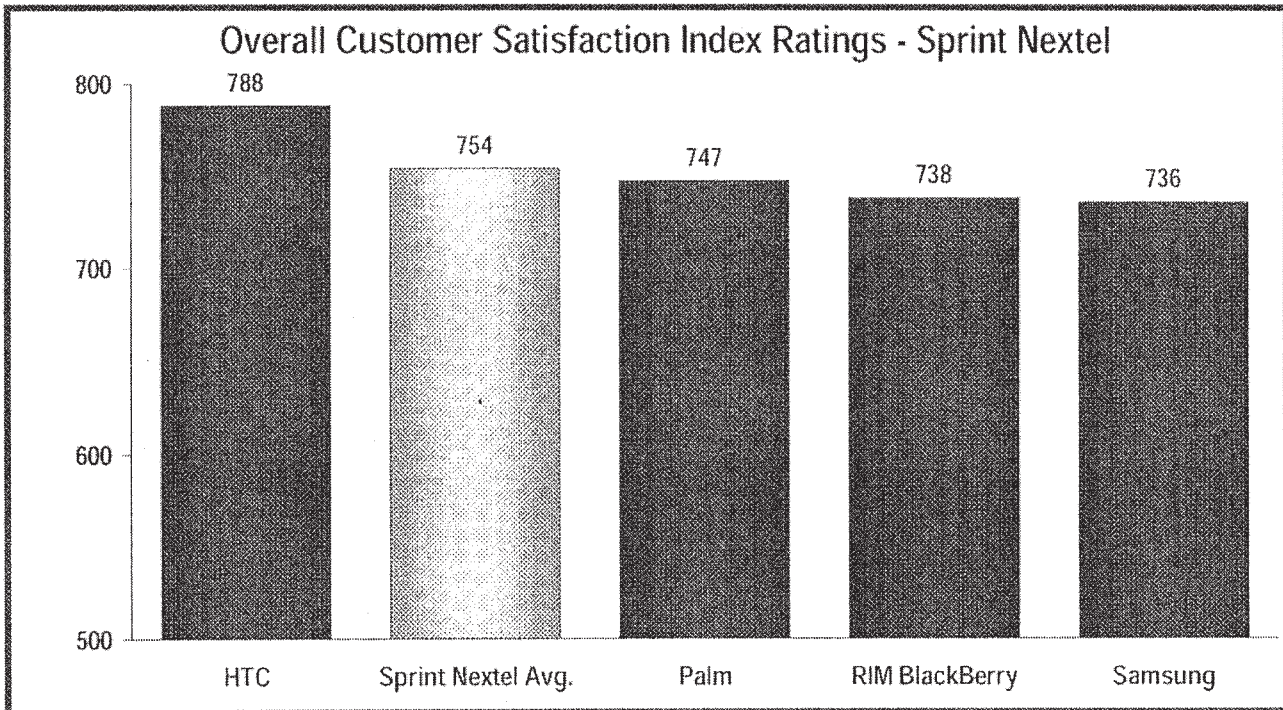
For handsets used for less than 2 years.

*Caution: small sample size.

Motorola and Palm not shown due to lack of availability.

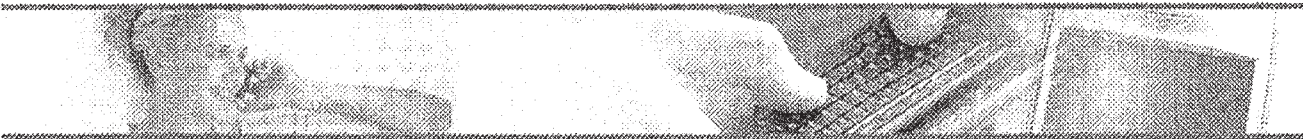


Smartphone CSI Ratings by Carrier—Sprint Nextel

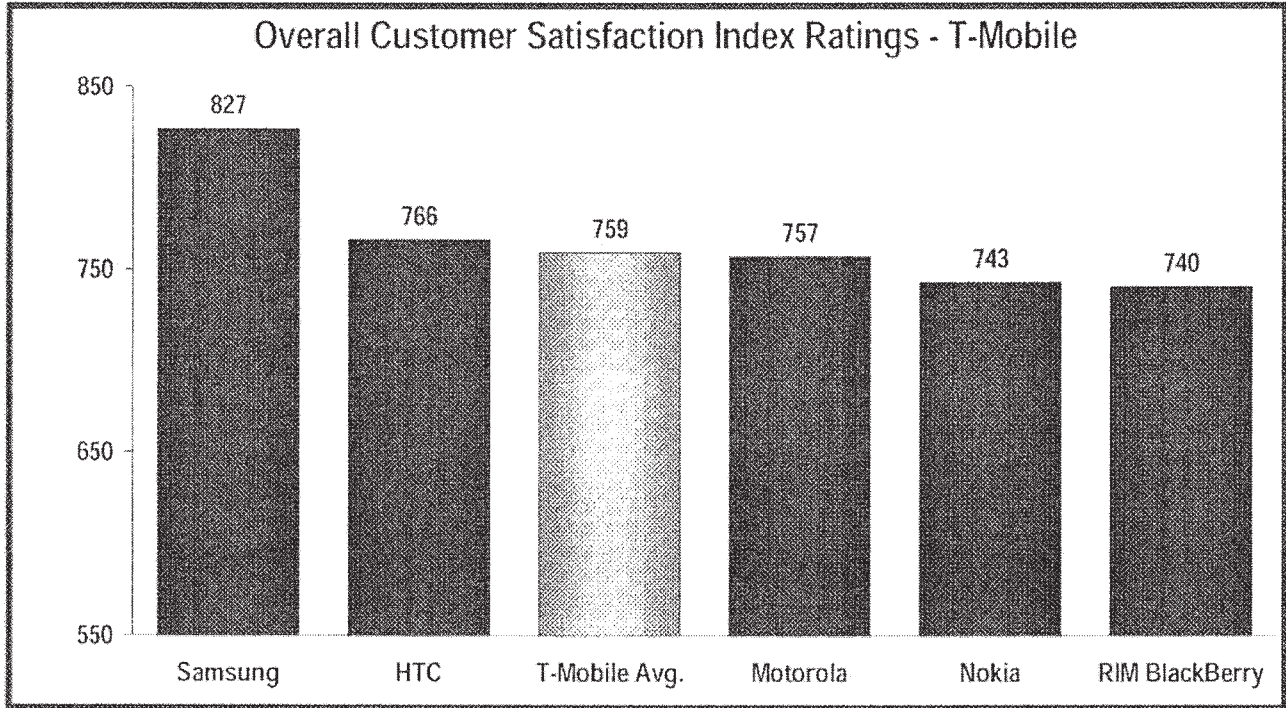


	Sprint Nextel Avg.	HTC	Palm	RIM BlackBerry	Samsung
Overall	754	788	747	738	736
Ease of Operation	785	805	786	776	769
Operating System	715	769	709	688	684
Physical Design	788	820	796	765	777
Features	769	832	739	731	756
Battery Function	645	611	613	698	626

For handsets used for less than 2 years.
 Apple, Nokia, and Motorola not shown due to lack of availability.



Smartphone CSI Ratings by Carrier—T-Mobile



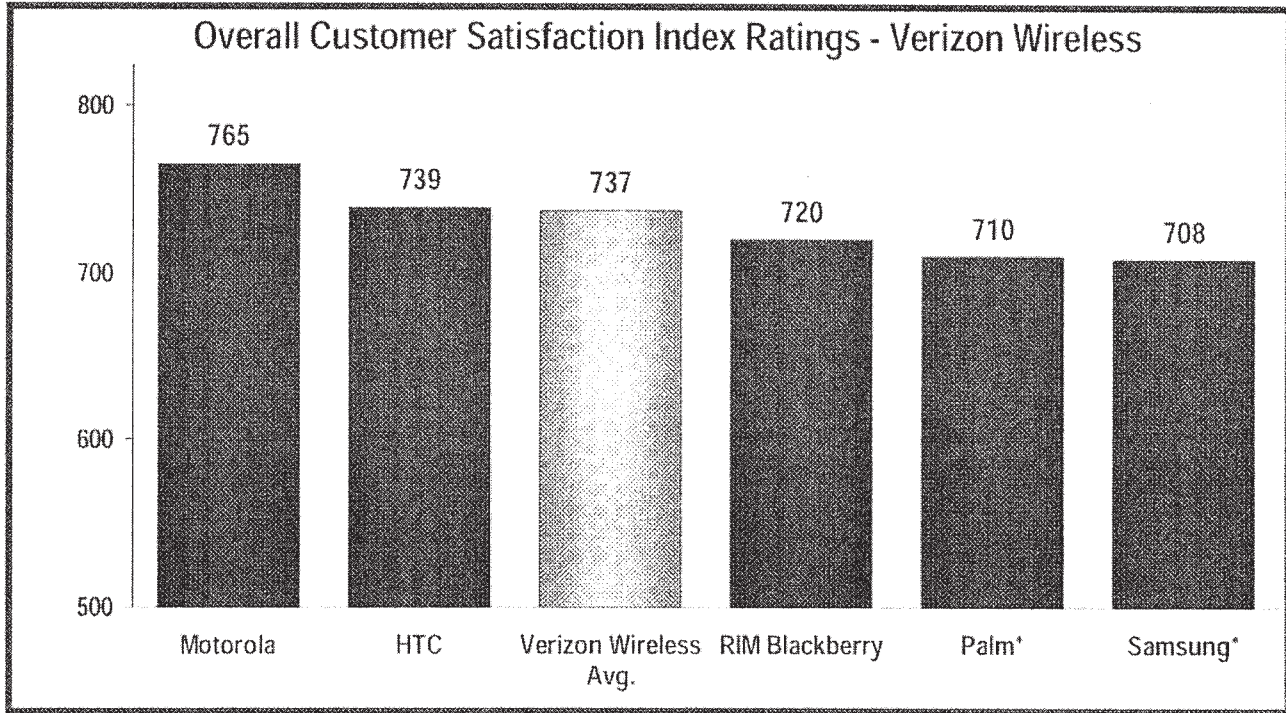
	T-Mobile Avg.	Samsung	HTC	Motorola	Nokia	RIM BlackBerry
Overall	759	827	766	757	743	740
Ease of Operation	790	848	802	785	759	773
Operating System	710	796	713	703	704	690
Physical Design	788	864	804	791	756	763
Features	767	843	785	783	747	731
Battery Function	699	711	660	671	751	728

For handsets used for less than 2 years.

Apple and Palm not shown due to lack of availability.

*Caution: small sample size.

Smartphone CSI Ratings by Carrier—Verizon Wireless



	Verizon Wireless Avg.	Motorola	HTC	RIM Blackberry	Palm*	Samsung*
Overall	737	765	739	720	710	708
Ease of Operation	754	780	740	748	707	700
Operating System	707	757	715	672	711	657
Physical Design	772	775	804	754	754	783
Features	748	796	761	716	696	698
Battery Function	646	646	579	675	629	692

For handsets used for less than 2 years.

Apple and Nokia not shown due to lack of availability.

*Caution: small sample size.



Smartphone User Profile



Smartphone User Profile

In addition to varied usage patterns between traditional handset and smartphone owners, their demographic profiles are slightly different. On average, smartphone users are 42 years old. Smartphone owners are also likely to be employed at a rate of 65% and have a household income of \$71,539. This is not surprising given the increased costs associated with both the purchase prices and service fees for smartphones. In addition, smartphone owners are more likely to replace technology they no longer see as necessary—36% of smartphone owners indicate they have replaced their landline with wireless calling.

Wireless smartphone satisfaction levels differ across the demographic profiles. For example, satisfaction is higher among those between the ages of 18 and 24 compared to the industry average (796 vs. 761). Those between 25-34 years old are also highly satisfied (771). Satisfaction is lowest among those ages 55 to 64 (732). There is little differentiation between income groups with regard to satisfaction.

A number of demographic profile differences exist between manufacturers as well. HTC users are just over 36 years of age, 2 years younger than average. While smartphone users are more educated than the population as a whole, 93% of Palm users have had some college education or more. Apple users report household incomes of \$88,250, more than \$5,000 above the industry average.



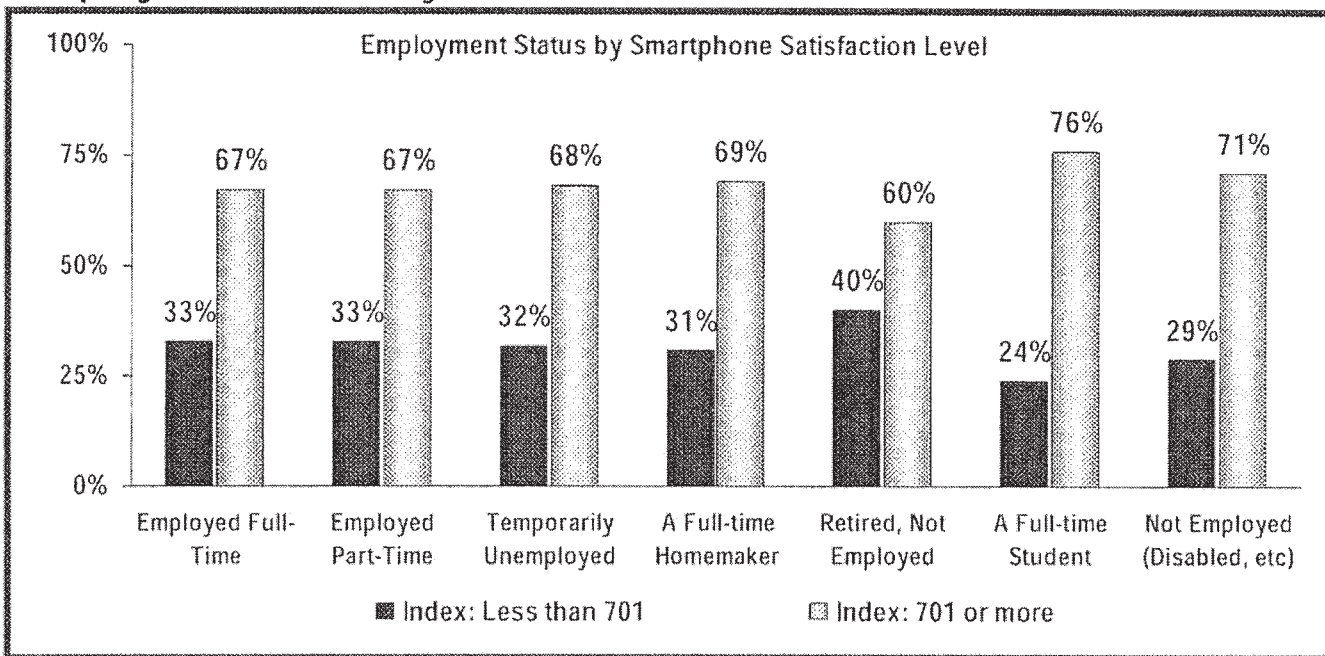
Demographic Summary of Smartphone Users

Demographic Breakout of Wireless Users

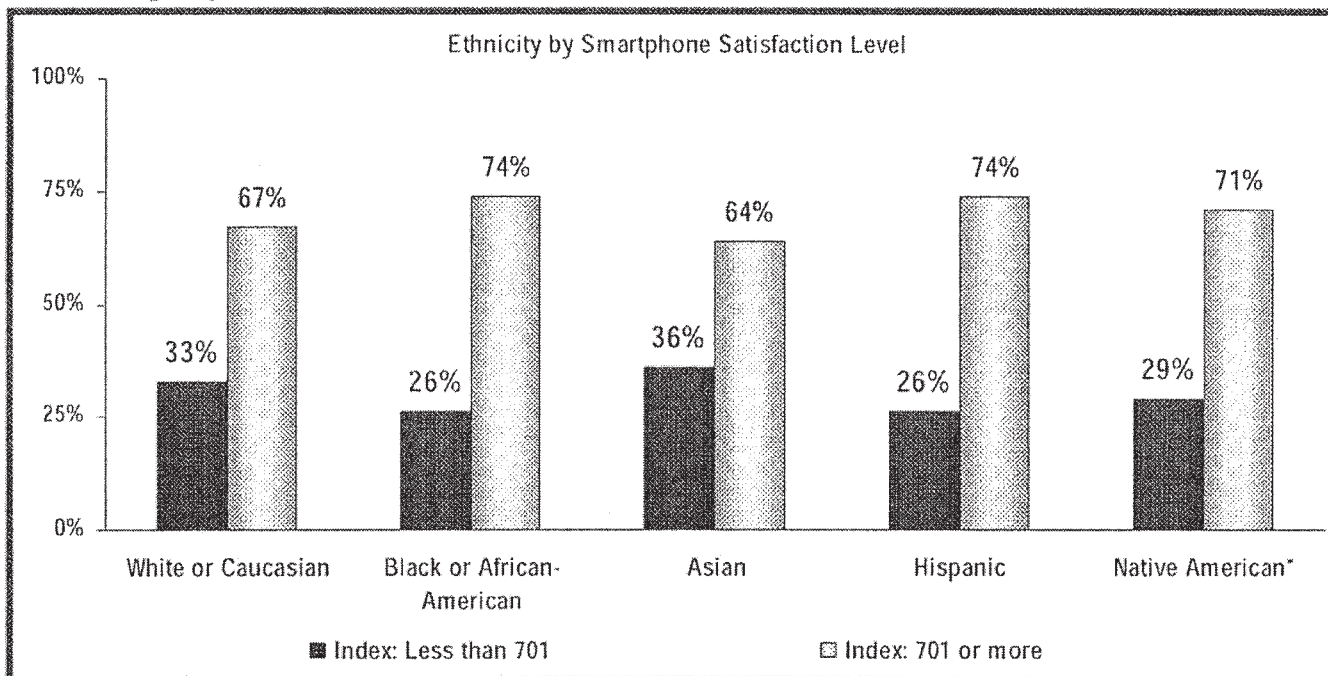
Demographic Category	Wireless Service Customers
% Employed	65%
Age (mean)	42
% With Some College Education or More	83%
Income (mean)	\$71,539
Ethnicity	
White/Caucasian	83%
African American	6%
Asian	6%
Hispanic	5%
Native American	1%
% Replaced landline calling with wireless service	36%
Number of Children Under 18 in Household (mean)	0.58

For handsets used less than 2 years.

Employment Status by Satisfaction Level



Ethnicity by Satisfaction Level

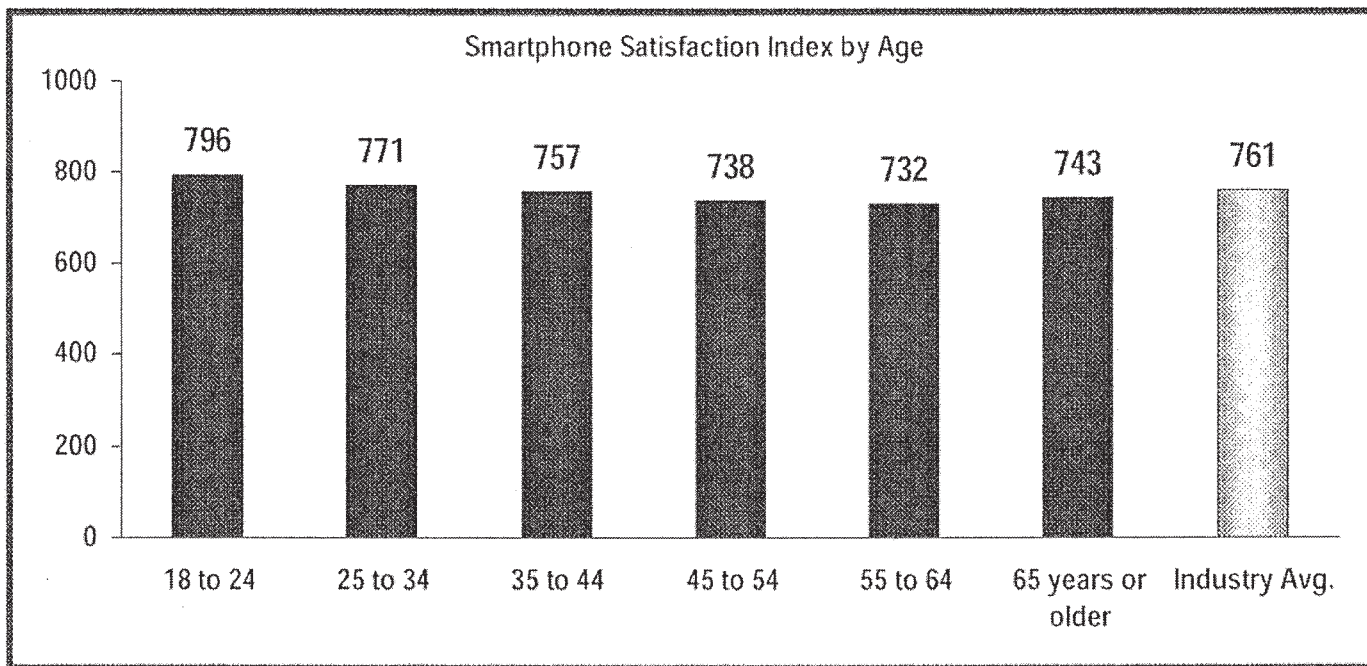


For handsets used less than 2 years.

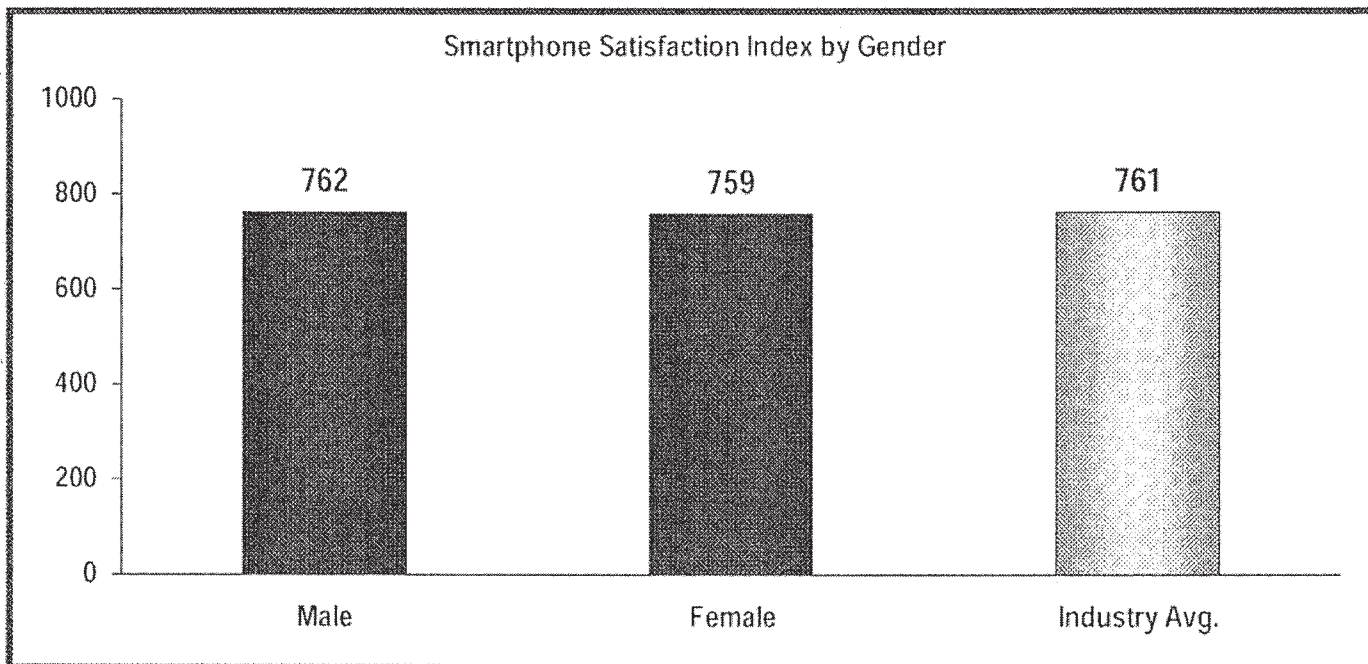
* Caution: small sample.



Age Index Differences



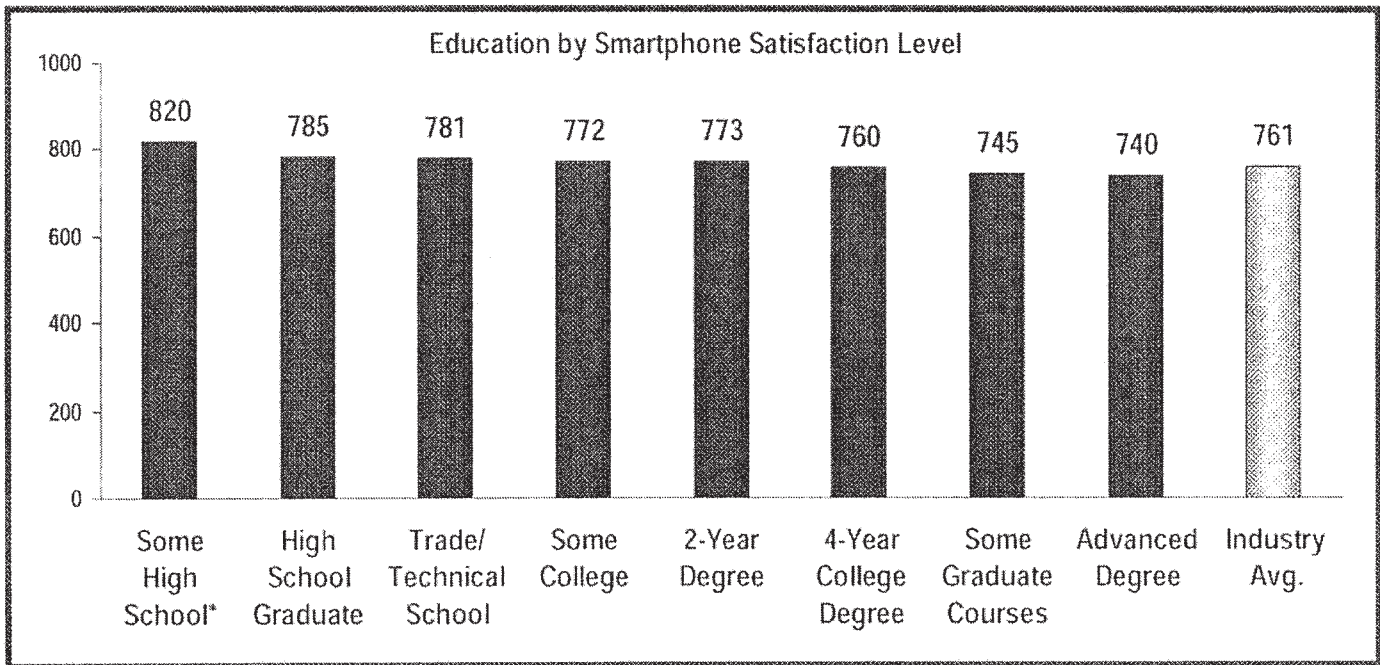
Gender Index Differences



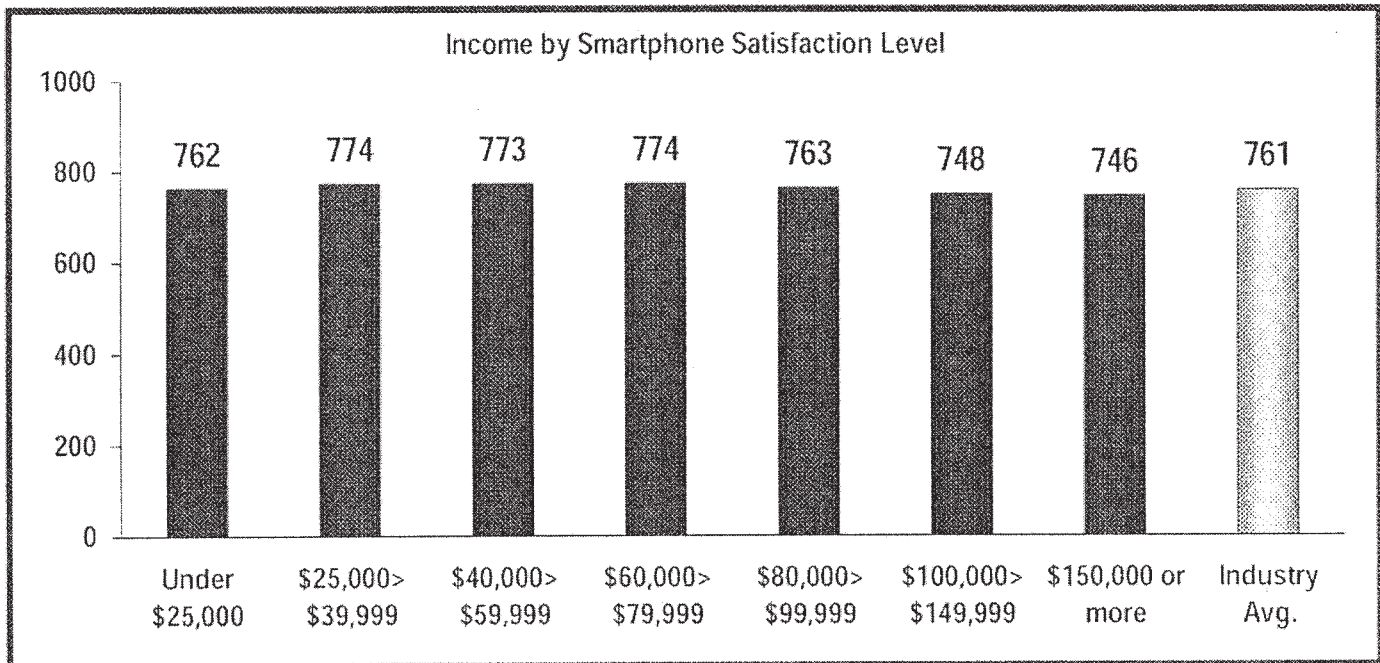
For handsets used less than 2 years.



Education OSAT Differences



Income OSAT Differences

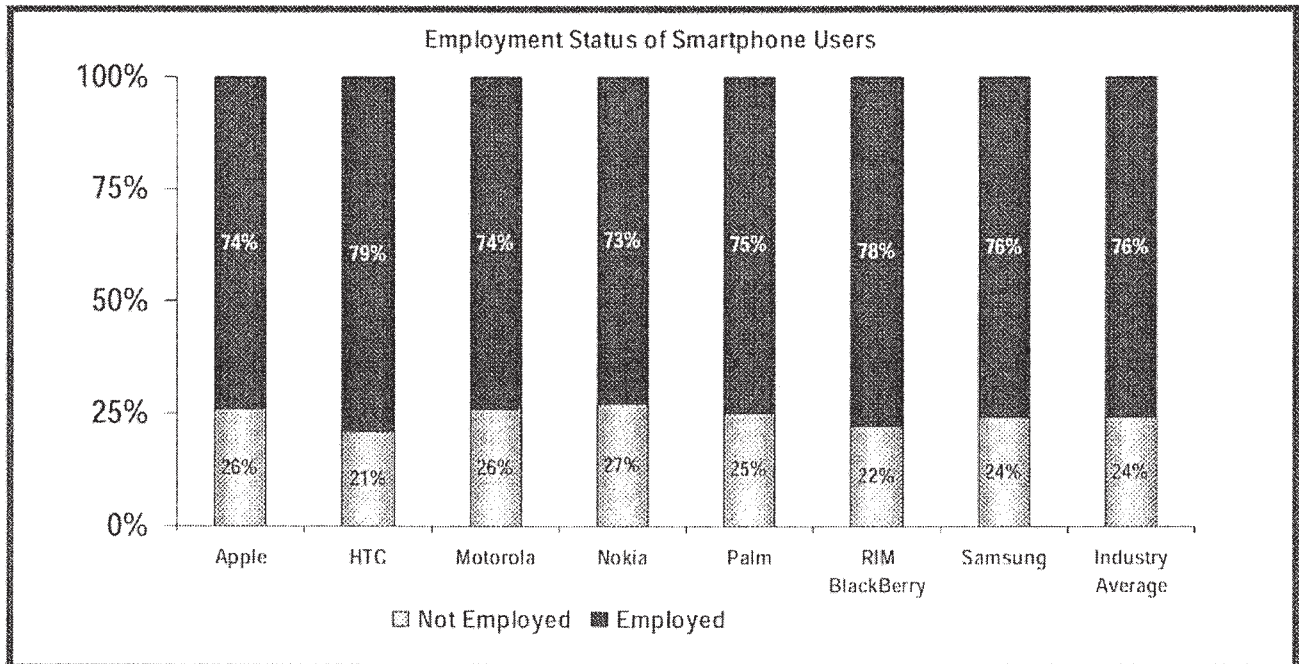


For handsets used less than 2 years.

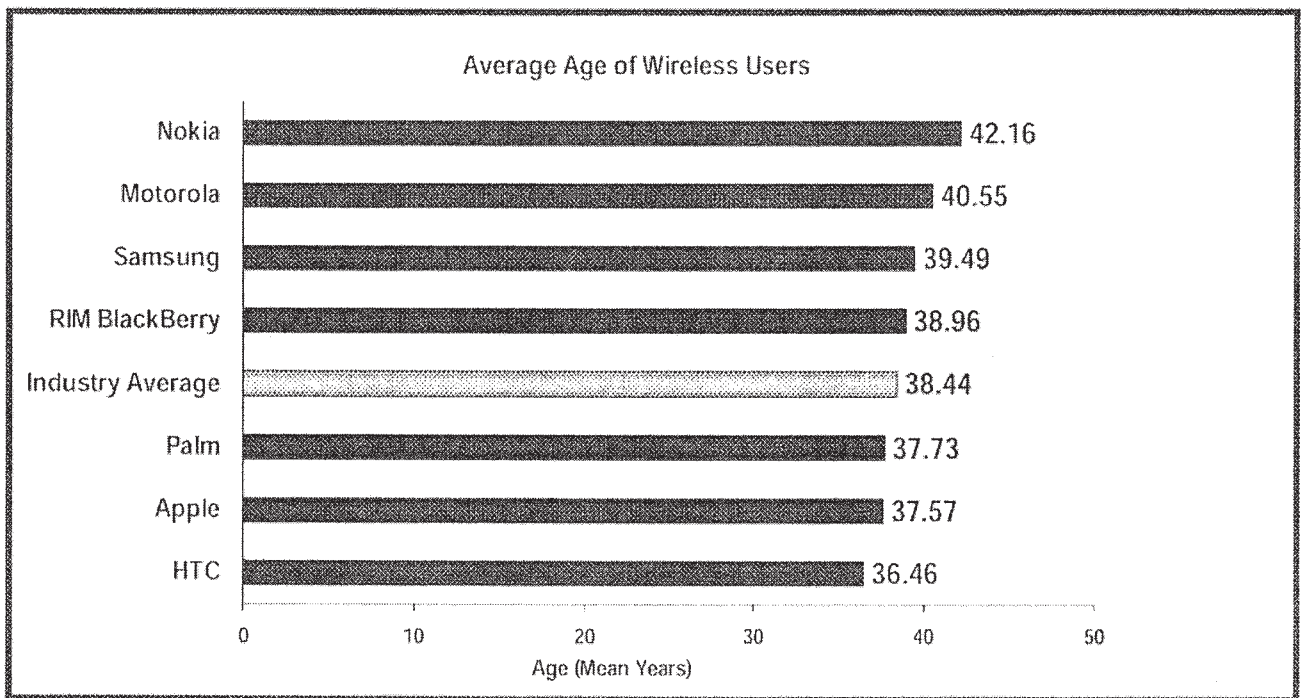
* Caution: small sample size.



Employment Status and Smartphone Brand



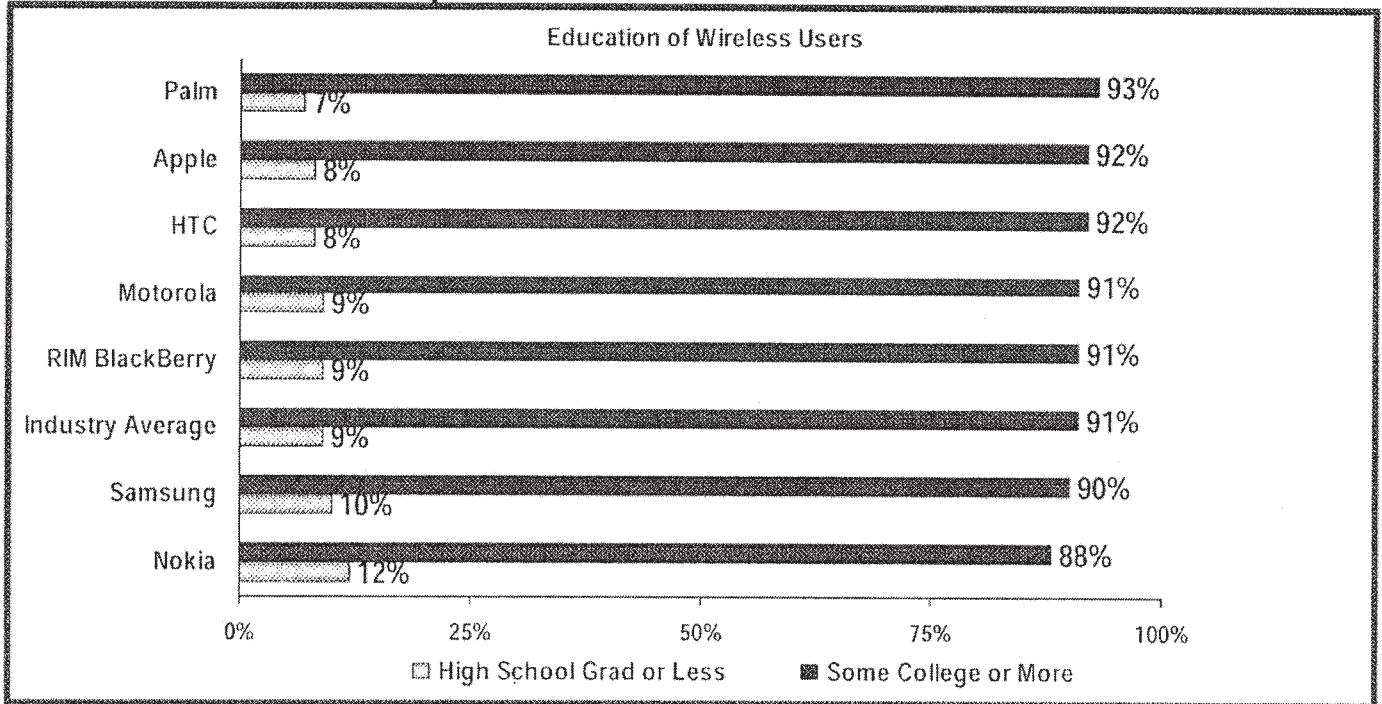
Age and Smartphone Brand



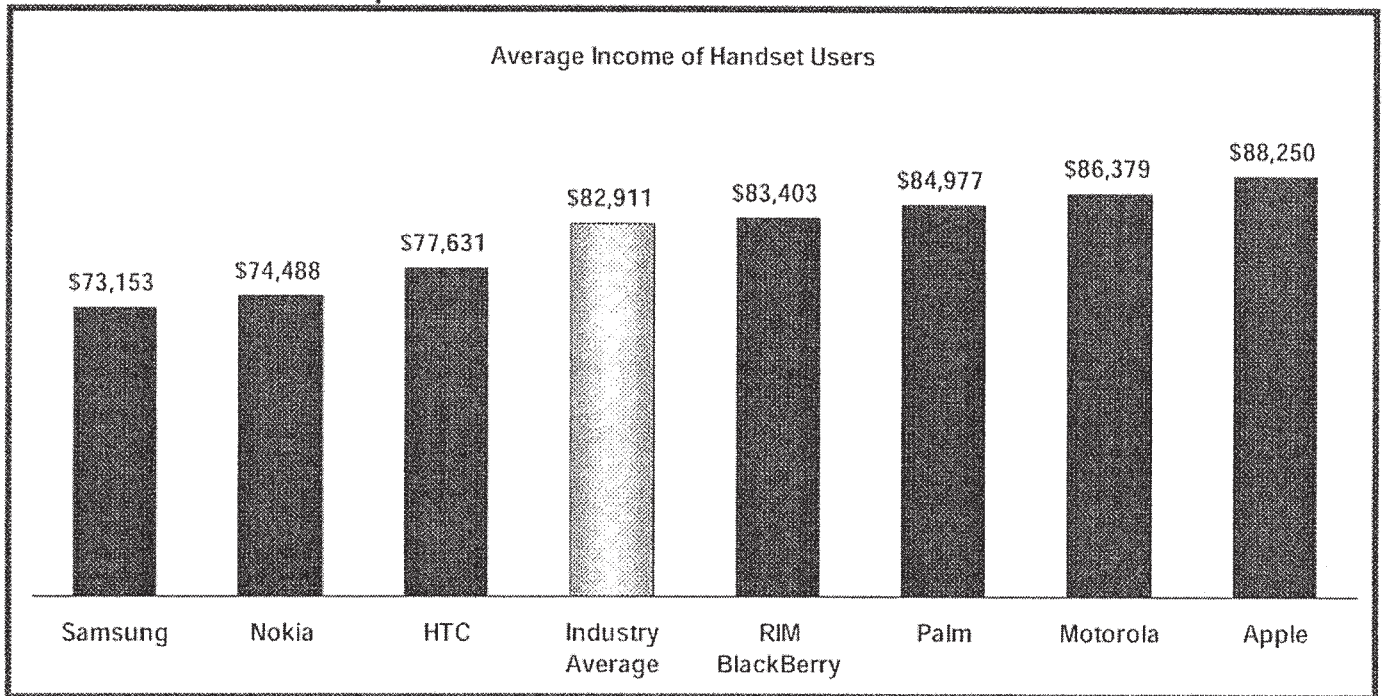
For handsets used less than 2 years.



Education and Smartphone Brand



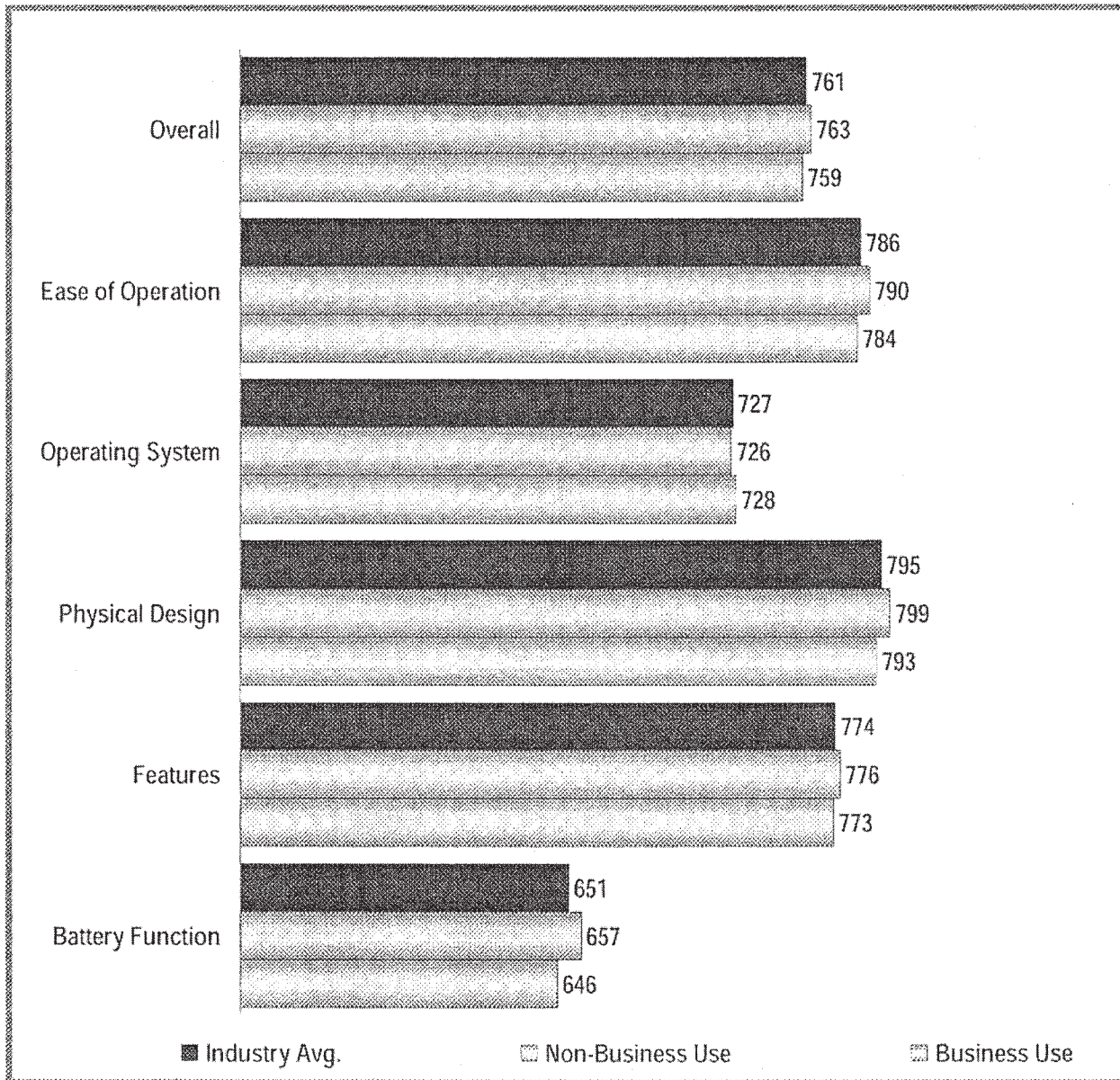
Income and Smartphone Brand



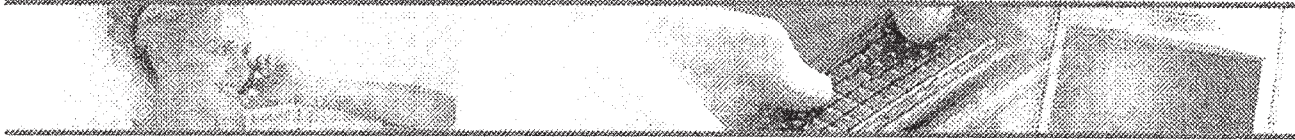
For handsets used less than 2 years.



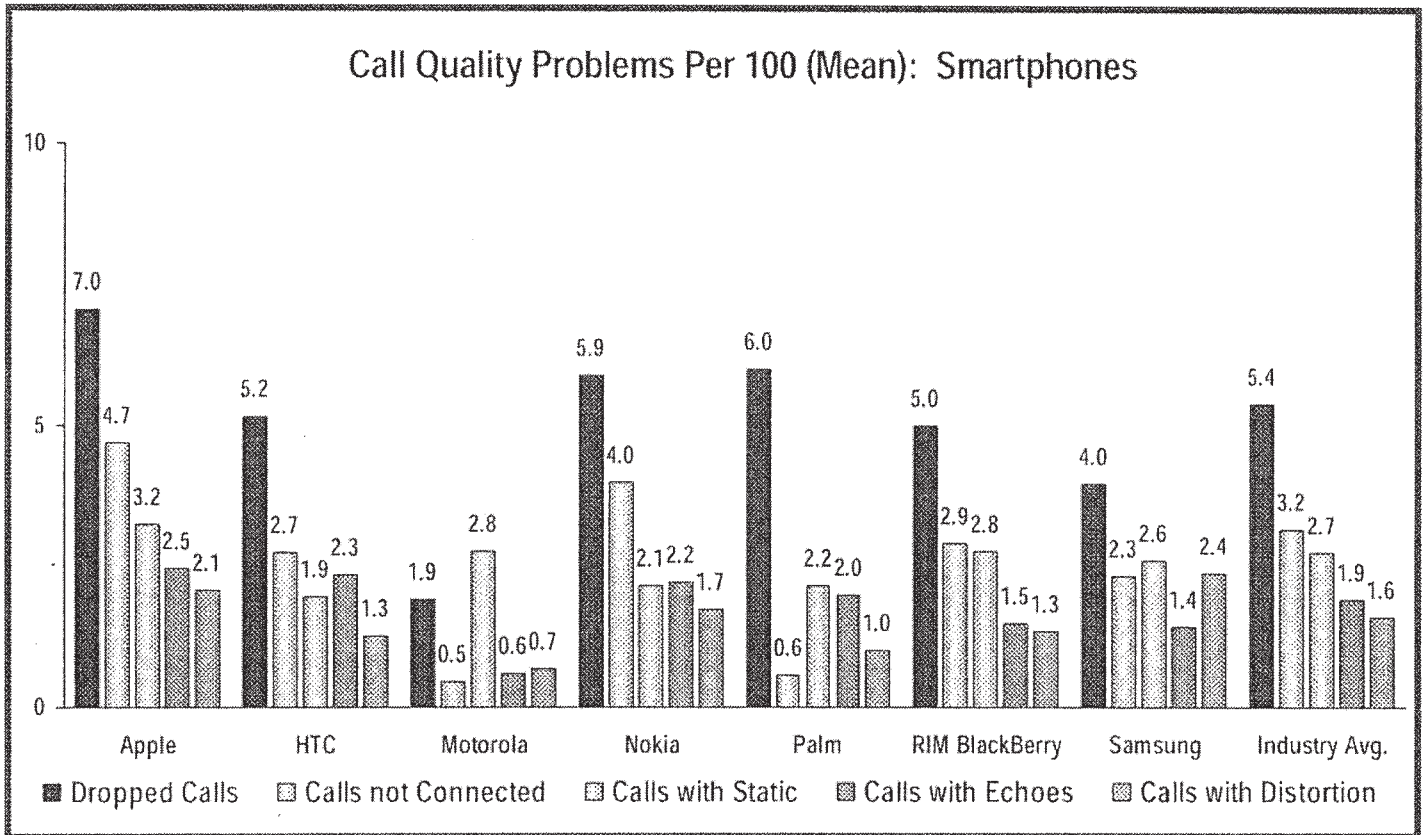
Smartphone CSI Ratings: Business Use Segmentation



Note: Industry Average is among handsets used for less than 2 years.



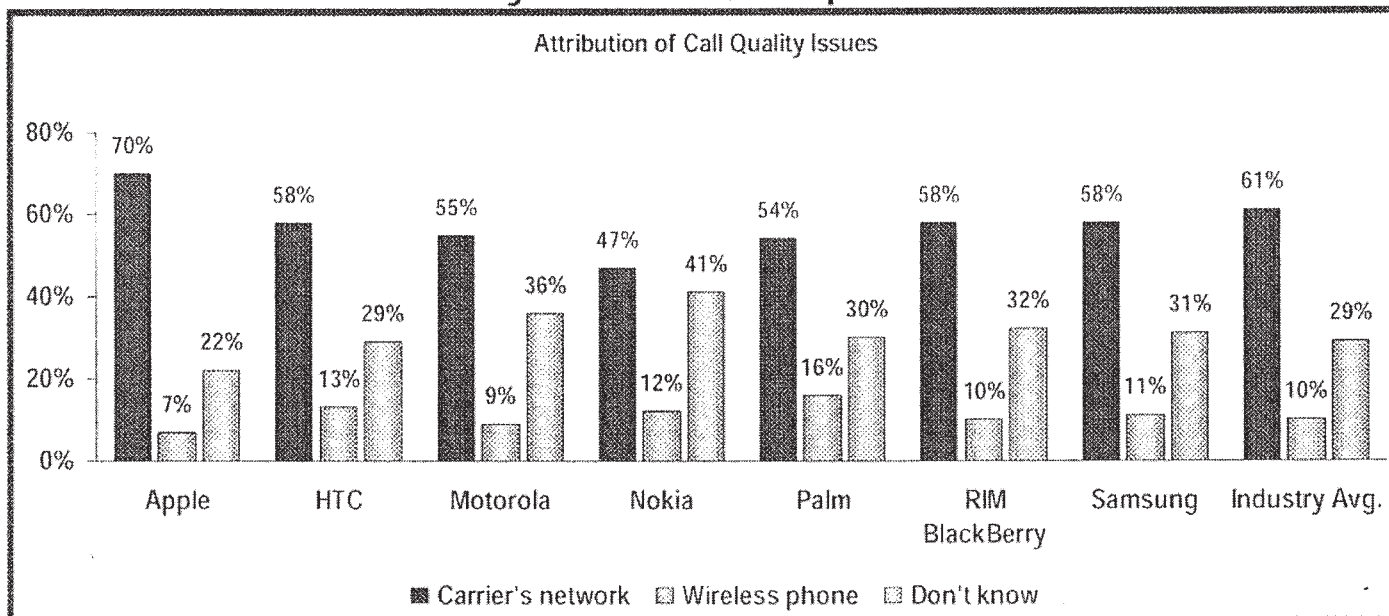
Call Quality Issues and Smartphone Brand



Note: Call Quality data is from 2011 Wireless Call Quality Performance Study, Vol. 1.

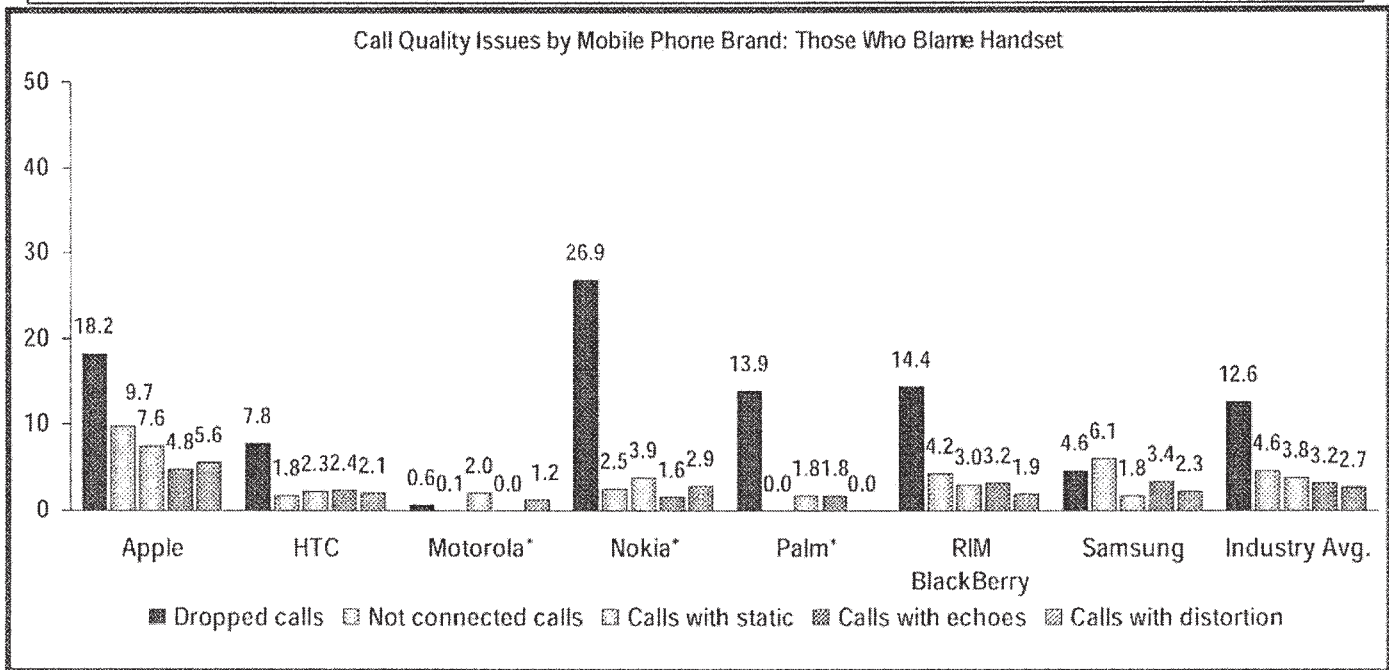


Attribution of Call Quality Issues & Smartphone Brand



Call Quality Issues and Smartphone Brand

PP100 Among Those Who Attributed Their Call Quality Problems to Their Handsets



*Caution: small sample size.

Note: Call Quality data is from 2011 Wireless Call Quality Performance Study, Vol. 1