

△ DEFENDANT △	United States District Court Northern District of California
	Case No. <u>4:20-cv-05640-YGR</u>
	Case Title <u>Epic Games, Inc. v. Apple, Inc.</u>
	Exhibit No. <u>DX-3441</u>
	Date Entered _____ By: _____, Deputy Clerk Susan Y. Soong, Clerk

Android to iPhone Switcher Study

US, UK, France, Germany, Japan, and China

Apple Market Research & Analysis
Fielded September 2015

APPLE
CONFIDENTIAL 1

Why this report?

The purpose of this study is to better understand the key drivers and barriers of switching from an Android smartphone to an iPhone.

Topic areas of this report include:

- Basic switcher and potential switcher statistics
- Barriers to switching
- Brand perceptions
- Satisfaction
- Drivers of switching
- Brand associations
- Set up and migration
- iPhone features
- Satisfaction with features

Methodology

Android to iPhone Switcher Study

Who did we survey?

“Switchers:” iPhone owners who replaced an Android smartphone, and

“Potential Switchers:” Android smartphone owners who are seriously considering an iPhone for their next smartphone purchase.

When did they buy?

Switchers purchased their iPhone within the past 9 months.

Potential Switchers were planning their next smartphone purchase in the next 6 months and have owned their current Android smartphone for over 6 months.

Which products

Switchers acquired one of the iPhone models below.

Potential Switchers had to have been most seriously considering an iPhone 5s, iPhone 5c, iPhone 6, iPhone 6 Plus, or a ‘new iPhone model not yet launched.’



iPhone 6 Plus



iPhone 6



iPhone 5s



iPhone 5c



iPhone 5



iPhone 4s

Where?

US, UK, France, Germany, Japan and China

How did we reach them?

The survey was fielded from August 1 thru September 8, 2015 using sample from consumer internet panels. Compared with the general population, Internet panels over-represent urban and metro areas and affluent consumers with Internet access.

Other notes

Data for which the base of respondents is less than 50 is not reported and noted as “small base.” To simplify reporting, chart labels for values under 3% may not be shown. The term “Top-2 box” refers to the total of the top 2 results in a 5-point scale. Totals, sub-totals, and nets may be off by a point or two due to rounding.

Other key screening criteria: Respondents were required to be 14 years old or older. Potential Switchers must have actively researched iPhone in the context of their next smartphone purchase.

Apple worked with db5 to conduct this study.

Drivers of switching to iPhone (Max-Diff data)

Maximum difference (Max-Diff) technique

- We used a statistical technique called “Max-Diff” to quantify the drivers of switching from an Android smartphone to iPhone. Max-Diff is used when a higher degree of differentiation is desired when measuring the importance of attributes, and when understanding the relative difference across attributes is helpful.
- In this study, respondents answered questions that forced trade-offs between statements (representing potential drivers of switching). Answers to these questions were used to calculate an Importance Index for each attribute. Importance Index scores are indexed to 100 = average (e.g. Importance Index of 200 is twice as important as 100).
- Switchers answered the question below 15 times but were shown a list of 4 attributes (out of 29) that varied according to a mathematical design. Potential switchers followed the same process but Which of these statements about smartphones was most and least important in your decision to switch to the iPhone? st and least (Please select one in each column.)

	Most Important	Least Important
Large screen	<input type="radio"/>	<input type="radio"/>
Camera takes high quality pictures	<input type="radio"/>	<input type="radio"/>
Fast smartphone	<input type="radio"/>	<input type="radio"/>
iMessage text messaging with family and friends	<input type="radio"/>	<input type="radio"/>

53% complete
[Next Page](#)

The top drivers of switching to iPhone are reliability and speed, followed by quality device construction, durability and battery

Importance Index (among Switchers)

	US	UK	France	Germany	Japan	China
Reliability (e.g., crashes and freezes less)	200	185	178	196	204	207
Long battery life	171	173	147	173	198	141
Fast smartphone	162	151	179	181	184	206
Durability	160	139	160	166	153	158
High quality device construction	158	151	172	173	162	193
Operating system that is always up-to-date	145	122	130	121	85	94
High quality screen	134	140	153	158	126	134
Better privacy of my personal information	121	117	94	114	145	163
Camera takes high quality pictures	121	123	130	144	98	113
OS that delivers a consistent experience across smartphone	120	105	51	86	54	72
Good value for the money	115	115	110	105	132	118
Manufacturer has good service and support	115	96	53	80	104	109
Better security	104	100	86	105	131	141
Works well with other technology products, services and	88	90	66	60	59	107
Features that are easily learned	85	97	101	89	133	48
Intuitive operation	83	81	109	120	112	80
Manufacturer continues to innovate	82	65	82	70	46	90
Physical appearance and design	82	98	102	127	121	91
Access to better quality apps	81	82	110	64	88	131
Easy to hold and operate in my hands	76	98	144	144	171	96
Large screen	75	80	72	80	79	51
Simple online backup (to protect data from loss) and sync	73	74	73	83	86	64
Is a smartphone I'm proud to own	67	68	88	57	47	64
Ease of migrating files from other devices (e.g., old	62	65	62	69	57	48
iMessage text messaging with family and friends	59	71	52	27	18	30
Simple experience where everything is already set up for me	55	81	84	44	46	52
FaceTime video calling with family and friends	49	56	54	22	10	33
Many people I know have this smartphone	29	39	38	18	34	36
Large selection of available music and video	27	34	20	25	19	30
n=	481	470	186	286	451	467

Index: 101-125 | 126-150 | 151-175 | 176+

Base: iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

APPLE
CONFIDENTIAL

6

The top drivers of switching among potential switchers are similar to those for switchers

Importance Index (among Potential Switchers)

	US	UK	France	Germany	Japan	China
Reliability (e.g., crashes and freezes less)	214	220	200	211	216	213
Long battery life	186	203	203	203	211	161
Durability	183	173	193	186	161	165
High quality device construction	174	166	178	176	171	189
Fast smartphone	164	160	174	181	192	216
Better privacy of my personal information	156	146	126	159	154	182
Good value for the money	150	147	166	154	139	139
High quality screen	142	149	160	157	127	139
Operating system that is always up-to-date	139	120	110	118	95	98
Better security	127	126	111	135	140	156
Camera takes high quality pictures	122	127	142	137	87	119
OS that delivers a consistent experience across smartphone	116	103	53	77	61	71
Manufacturer has good service and support	112	96	72	90	111	115
Works well with other technology products, services and	84	91	59	69	73	119
Features that are easily learned	76	80	88	79	104	39
Easy to hold and operate in my hands	75	99	138	134	154	101
Large screen	75	75	100	83	66	37
Intuitive operation	73	74	89	94	103	63
Simple online backup (to protect data from loss) and sync	72	80	80	89	87	70
Physical appearance and design	69	73	84	79	114	75
Ease of migrating files from other devices (e.g., old)	67	77	77	88	74	61
Access to better quality apps	60	66	71	40	86	113
Manufacturer continues to innovate	58	47	59	42	45	68
Simple experience where everything is already set up for me	55	77	73	41	32	53
Is a smartphone I'm proud to own	41	30	32	22	37	43
iMessage text messaging with family and friends	38	31	20	19	15	21
FaceTime video calling with family and friends	31	30	19	17	10	31
Large selection of available music and video	24	21	9	13	16	24
Many people I know have this smartphone	15	13	11	6	18	17
n=	483	470	276	339	261	461

Index: 101-125 | 126-150 | 151-175 | 176+

Base: Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

APPLE
CONFIDENTIAL

7

Switchers assign more importance than do potential switchers to ease of use, innovation, design, and better quality apps

Importance Index: Differences between Switchers and Potential Switchers

	US	UK	France	Germany	Japan	China
Reliability (e.g., crashes and freezes less)	+	+++	++	+	+	
Long battery life	+	+++	+++	+++	+	++
Fast smartphone						+
Durability	++	+++	+++	++		
High quality device construction	+	+				
Operating system that is always up-to-date			++		+	
High quality screen						
Better privacy of my personal information	+++	++	+++	+++		+
Camera takes high quality pictures			+		+	
OS that delivers a consistent experience across smartphone	+++	+++	+++	+++		
Good value for the money	+++	+++	+++	+++		++
Manufacturer has good service and support			+	+		
Better security	++	++	++	+++		+
Works well with other technology products, services and					+	+
Features that are easily learned		+	+	+	++	
Intuitive operation	+		++	++		+
Manufacturer continues to innovate	++	+	++	++		++
Physical appearance and design	+	++	+	+++		+
Access to better quality apps	++	+	+++	++		+
Easy to hold and operate in my hands				+	+	
Large screen			++		+	+
Simple online backup (to protect data from loss) and sync						
Is a smartphone I'm proud to own	++	+++	+++	+++	+	++
Ease of migrating files from other devices (e.g., old		+	+	+	+	+
iMessage text messaging with family and friends	++	+++	+++			
Simple experience where everything is already set up for me			+		+	
FaceTime video calling with family and friends	+	++	+++			
Many people I know have this smartphone	+	++	++	+	+	+
Large selection of available music and video		+	+	+		

• 10 pts. higher than other group
 • 20 pts. higher than other group
 • 30+ pts. higher than other group

Switcher

Potential

Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone? (Switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone? (Potential Switchers)

APPLE
CONFIDENTIAL X

Brand associations

Smartphone brand associations

- A brand association question was asked to understand how iPhone smartphones compare to key competitive smartphones on the same dimensions tested in the Max-Diff exercises
 - Respondents could select up to 10 dimensions per smartphone brand, to understand key brand associations
 - The same dimension could be associated with multiple smartphone brands
 - Switchers were shown three brands: iPhone, the brand they switched from, and the top brand from the priority list below that was their 2nd choice when switching to iPhone (or the top brand, if none considered)
 - Potential Switchers were shown three brands: iPhone, the Android brand they currently own, and the top brand from the priority list they are seriously considering for the next smartphone (or the top brand, if none considered)

Priority order	US	UK	France	Germany	Japan	China
1	Samsung	Samsung	Samsung	Samsung	Sony	Xiaomi
2	HTC	Sony	Sony	Sony	Sharp	Huawei
3	LG	Nokia	Nokia	Nokia	Fujitsu	Lenovo
4	Motorola	LG	LG	LG	Samsung	Samsung

- This allows us to see how iPhone “performs” against competitive brands, on the dimensions driving switching

APPLE
CONFIDENTIAL X

Items related to performance, camera, screen, design, and construction, top the iPhone associations for switchers

Statement describes smartphones from Apple (switchers)

	US	UK	France	Germany	Japan	China
Fast smartphone	39%	38%	48%	48%	38%	48%
Camera takes high quality pictures	39%	42%	39%	50%	34%	40%
Reliability (e.g., crashes and freezes less)	38%	35%	43%	44%	35%	46%
Operating system that is always up-to-date	37%	38%	42%	44%	30%	25%
High quality screen	37%	37%	39%	42%	28%	37%
Long battery life	36%	23%	16%	34%	43%	23%
High quality device construction	34%	31%	36%	48%	32%	42%
Video calling with family and friends	33%	31%	24%	21%	11%	26%
Is a smartphone I'm proud to own	32%	36%	50%	34%	23%	36%
Manufacturer continues to innovate	32%	27%	39%	27%	37%	28%
Physical appearance and design	32%	38%	39%	52%	37%	27%
OS that delivers a consistent experience across smartphone	31%	28%	19%	25%	13%	19%
Text messaging with family and friends	30%	32%	30%	22%	8%	27%
Many people I know have this smartphone	30%	31%	31%	20%	42%	30%
Better security	29%	26%	23%	28%	26%	37%
Access to better quality apps	29%	35%	38%	33%	24%	29%
Durability	28%	21%	32%	36%	13%	36%
Simple online backup (to protect data from loss) and sync	28%	27%	30%	27%	14%	22%
Manufacturer has good service and support	27%	19%	20%	20%	15%	26%
Large screen	27%	25%	23%	25%	29%	21%
Easy to hold and operate in my hands	26%	34%	41%	39%	29%	28%
Works well with other technology products, services and	26%	26%	23%	21%	13%	15%
Features that are easily learned	25%	28%	33%	30%	25%	14%
Intuitive operation	24%	24%	30%	31%	30%	21%
Better privacy of my personal information	24%	20%	22%	23%	18%	26%
Ease of migrating files from other devices (e.g., old	23%	21%	21%	20%	12%	16%
Simple experience where everything is already set up for me	22%	24%	25%	15%	10%	18%
Good value for the money	21%	13%	11%	15%	27%	16%
Large selection of available music and video	19%	23%	15%	17%	20%	15%
n=	481	470	186	286	451	467



Base: iPhone owners (switchers)

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

APPLE
CONFIDENTIAL

The top iPhone associations for potential switchers parallel those for switchers

Statement describes smartphones from Apple (potential switchers)

	US	UK	France	Germany	Japan	China
Camera takes high quality pictures	44%	39%	44%	44%	23%	45%
High quality screen	42%	42%	54%	45%	31%	41%
Fast smartphone	38%	39%	50%	41%	36%	52%
Manufacturer continues to innovate	37%	35%	46%	40%	49%	33%
Operating system that is always up-to-date	35%	34%	34%	40%	38%	24%
Reliability (e.g., crashes and freezes less)	34%	29%	33%	37%	23%	49%
Physical appearance and design	33%	36%	48%	45%	42%	31%
Text messaging with family and friends	33%	33%	18%	23%	13%	27%
Access to better quality apps	32%	31%	27%	30%	29%	33%
Durability	31%	26%	34%	31%	11%	40%
Better security	31%	23%	27%	24%	25%	40%
Many people I know have this smartphone	31%	36%	34%	14%	48%	38%
Large screen	30%	29%	39%	27%	21%	20%
Is a smartphone I'm proud to own	30%	33%	32%	30%	28%	37%
High quality device construction	30%	34%	54%	42%	33%	41%
Video calling with family and friends	28%	30%	20%	23%	12%	30%
Easy to hold and operate in my hands	28%	28%	28%	32%	27%	27%
OS that delivers a consistent experience across smartphone	27%	22%	14%	21%	18%	17%
Manufacturer has good service and support	27%	24%	19%	23%	14%	26%
Simple online backup (to protect data from loss) and sync	25%	20%	22%	25%	16%	25%
Large selection of available music and video	25%	30%	15%	21%	27%	18%
Works well with other technology products, services and	24%	21%	13%	19%	17%	13%
Long battery life	24%	23%	20%	29%	19%	20%
Better privacy of my personal information	23%	18%	18%	25%	14%	28%
Features that are easily learned	22%	23%	22%	22%	21%	15%
Intuitive operation	21%	25%	36%	22%	39%	18%
Good value for the money	17%	13%	13%	10%	27%	17%
Simple experience where everything is already set up for me	17%	17%	17%	15%	10%	14%
Ease of migrating files from other devices (e.g., old)	17%	19%	13%	22%	10%	17%
n=	483	470	276	339	261	461



Base: Android smartphone owners (potential switchers)

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

APPLE
CONFIDENTIAL
10

Reliability and battery life are among the areas switchers associate with iPhone more so than potential switchers

Statement describes smartphones from Apple: Differences between Switchers and Potential Switchers

	US	UK	France	Germany	Japan	China
Fast smartphone				+		
Camera takes high quality pictures	+		+	+	++	+
Reliability (e.g., crashes and freezes less)		+	++	+	++	
Operating system that is always up-to-date			+			+
High quality screen	+	+	+++			
Long battery life	++			+	++++	
High quality device construction			+++	+		
Video calling with family and friends	+					
Is a smartphone I'm proud to own			+++		+	
Manufacturer continues to innovate	+	+	+	++	++	+
Physical appearance and design			+	+		+
OS that delivers a consistent experience across smartphone	+	+	+			+
Text messaging with family and friends			++			+
Many people I know have this smartphone	+			+	+	+
Better security						
Access to better quality apps			++			+
Durability	+			+		
Simple online backup (to protect data from loss) and sync	+	+				
Manufacturer has good service and support	+					
Large screen			+++		+	
Easy to hold and operate in my hands	+	++	+			
Works well with other technology products, services and	+	++				
Features that are easily learned	+	++	+			
Intuitive operation			+	+	+	
Better privacy of my personal information						
Ease of migrating files from other devices (e.g., old	+		+			
Simple experience where everything is already set up for me	+	+	+			
Good value for the money				+		
Large selection of available music and video	+	+			+	

Each + represents a score of 5 pts. higher for one group over the other group

Switcher | Potential

Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

APPLE
CONFIDENTIAL

X

Switchers: iPhone brand associations and Importance Index

Statement describes smartphones from Apple

	US	UK	France	Germany	Japan	China
Fast smartphone	39%	38%	48%	48%	38%	48%
Camera takes high quality pictures	39%	42%	39%	50%	34%	40%
Reliability (e.g., crashes and freezes less)	38%	35%	43%	44%	35%	46%
Operating system that is always up-to-date	37%	38%	42%	44%	30%	25%
High quality screen	37%	37%	39%	42%	28%	37%
Long battery life	36%	23%	16%	34%	43%	23%
High quality device construction	34%	31%	36%	48%	32%	42%
Video calling with family and friends	33%	31%	24%	21%	11%	26%
Is a smartphone I'm proud to own	32%	36%	50%	34%	23%	36%
Manufacturer continues to innovate	32%	38%	39%	52%	37%	27%
Physical appearance and design	32%	27%	39%	27%	37%	28%
OS that delivers a consistent experience across smartphone	31%	28%	19%	25%	13%	19%
Text messaging with family and friends	30%	32%	30%	22%	8%	27%
Many people I know have this smartphone	30%	31%	31%	20%	42%	30%
Better security	29%	26%	23%	28%	26%	37%
Access to better quality apps	29%	35%	38%	33%	24%	29%
Durability	28%	21%	32%	36%	13%	36%
Simple online backup (to protect data from loss) and sync	28%	27%	30%	27%	14%	22%
Manufacturer has good service and support	27%	19%	20%	20%	15%	26%
Large screen	27%	25%	23%	25%	29%	21%
Easy to hold and operate in my hands	26%	34%	41%	39%	29%	28%
Works well with other technology products, services and	26%	26%	23%	21%	13%	15%
Features that are easily learned	25%	28%	33%	30%	25%	14%
Intuitive operation	24%	24%	30%	31%	30%	21%
Better privacy of my personal information	24%	20%	22%	23%	18%	26%
Ease of migrating files from other devices (e.g., old	23%	21%	21%	20%	12%	16%
Simple experience where everything is already set up for me	22%	24%	25%	15%	10%	18%
Good value for the money	21%	13%	11%	15%	27%	16%
Large selection of available music and video	19%	23%	15%	17%	20%	15%
n=	481	470	186	286	451	467

Importance Index: 101-125 | 126-150 | 151-175 | 176+

Base: iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

APPLE
CONFIDENTIAL

X

Potential Switchers: iPhone brand associations and Importance Index

Statement describes smartphones from Apple

	US	UK	France	Germany	Japan	China
Camera takes high quality pictures	44%	39%	44%	44%	23%	45%
High quality screen	42%	42%	54%	45%	31%	41%
Fast smartphone	38%	39%	50%	41%	36%	52%
Manufacturer continues to innovate	37%	35%	46%	40%	49%	33%
Operating system that is always up-to-date	35%	34%	34%	40%	38%	24%
Reliability (e.g., crashes and freezes less)	34%	29%	33%	37%	23%	49%
Physical appearance and design	33%	36%	48%	45%	42%	31%
Text messaging with family and friends	33%	33%	18%	23%	13%	27%
Access to better quality apps	32%	31%	27%	30%	29%	33%
Durability	31%	26%	34%	31%	11%	40%
Better security	31%	23%	27%	24%	25%	40%
Many people I know have this smartphone	31%	36%	34%	14%	48%	38%
Large screen	30%	29%	39%	27%	21%	20%
Is a smartphone I'm proud to own	30%	33%	32%	30%	28%	37%
High quality device construction	30%	34%	54%	42%	33%	41%
Video calling with family and friends	28%	30%	20%	23%	12%	30%
Easy to hold and operate in my hands	28%	28%	28%	32%	27%	27%
OS that delivers a consistent experience across smartphone	27%	22%	14%	21%	18%	17%
Manufacturer has good service and support	27%	24%	19%	23%	14%	26%
Simple online backup (to protect data from loss) and sync	25%	20%	22%	25%	16%	25%
Large selection of available music and video	25%	30%	15%	21%	27%	18%
Works well with other technology products, services and	24%	21%	13%	19%	17%	13%
Long battery life	24%	23%	20%	29%	19%	20%
Better privacy of my personal information	23%	18%	18%	25%	14%	28%
Features that are easily learned	22%	23%	22%	22%	21%	15%
Intuitive operation	21%	25%	36%	22%	39%	18%
Good value for the money	17%	13%	13%	10%	27%	17%
Simple experience where everything is already set up for me	17%	17%	17%	15%	10%	14%
Ease of migrating files from other devices (e.g., old	17%	19%	13%	22%	10%	17%
n=	483	470	276	339	261	461

Importance Index: 101-125 | 126-150 | 151-175 | 176+

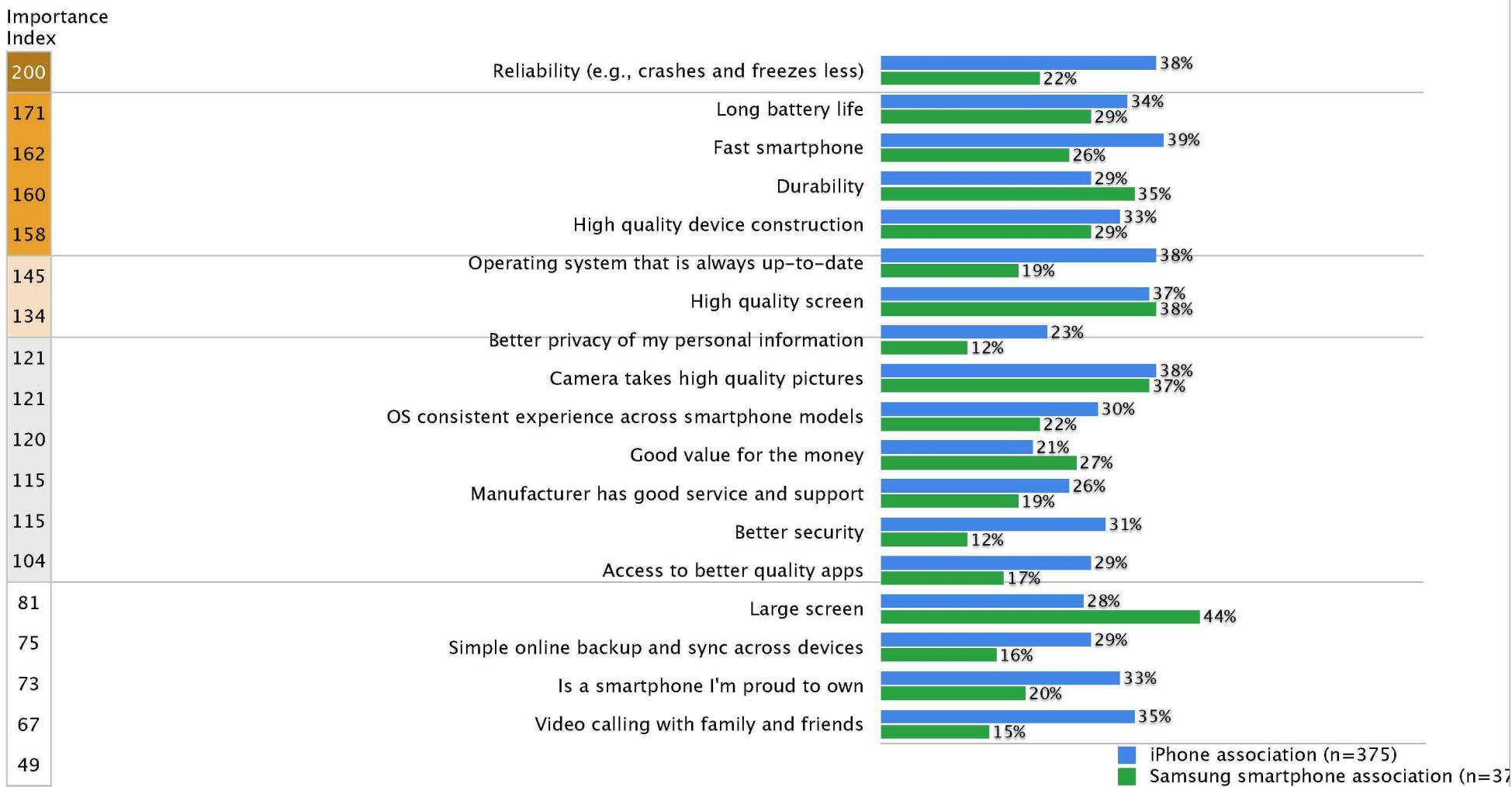
Base: Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

APPLE
CONFIDENTIAL X

iPhone and competitive brand associations relative to Importance Index

iPhone vs. Samsung smartphone brand associations (US switchers)



Base: US iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

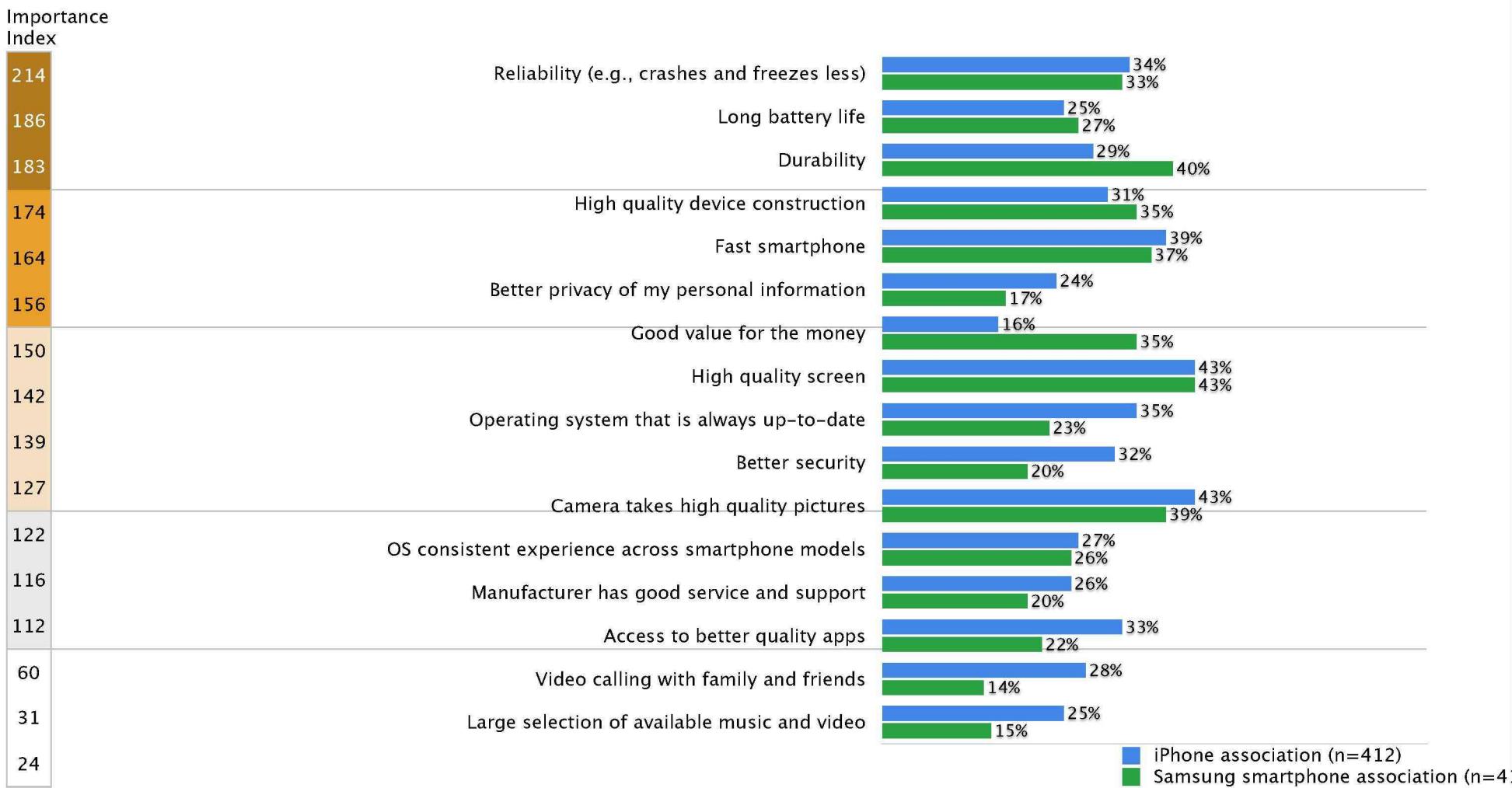
Base: US iPhone owners (switchers) who owned a Samsung smartphone before their iPhone or seriously considered Samsung when switching to iPhone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison brand

APPLE
CONFIDENTIAL
12

iPhone vs. Samsung smartphone brand associations (US potential switchers)



Base: US Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

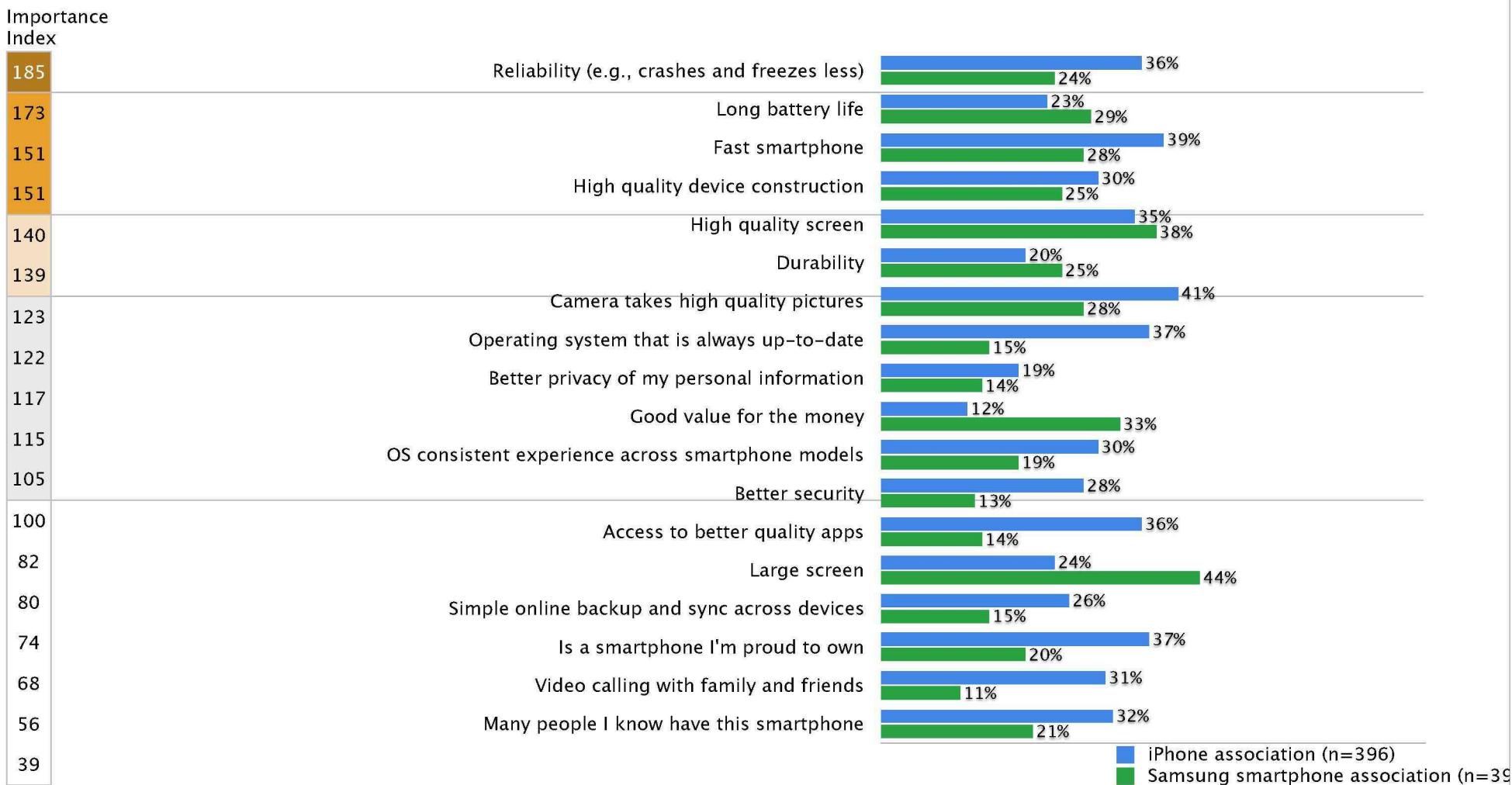
Base: US Android smartphone owners (potential switchers) who currently own a Samsung smartphone or are seriously considering Samsung as their next smartphone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

APPLE
CONFIDENTIAL

13

iPhone vs. Samsung smartphone brand associations (UK switchers)



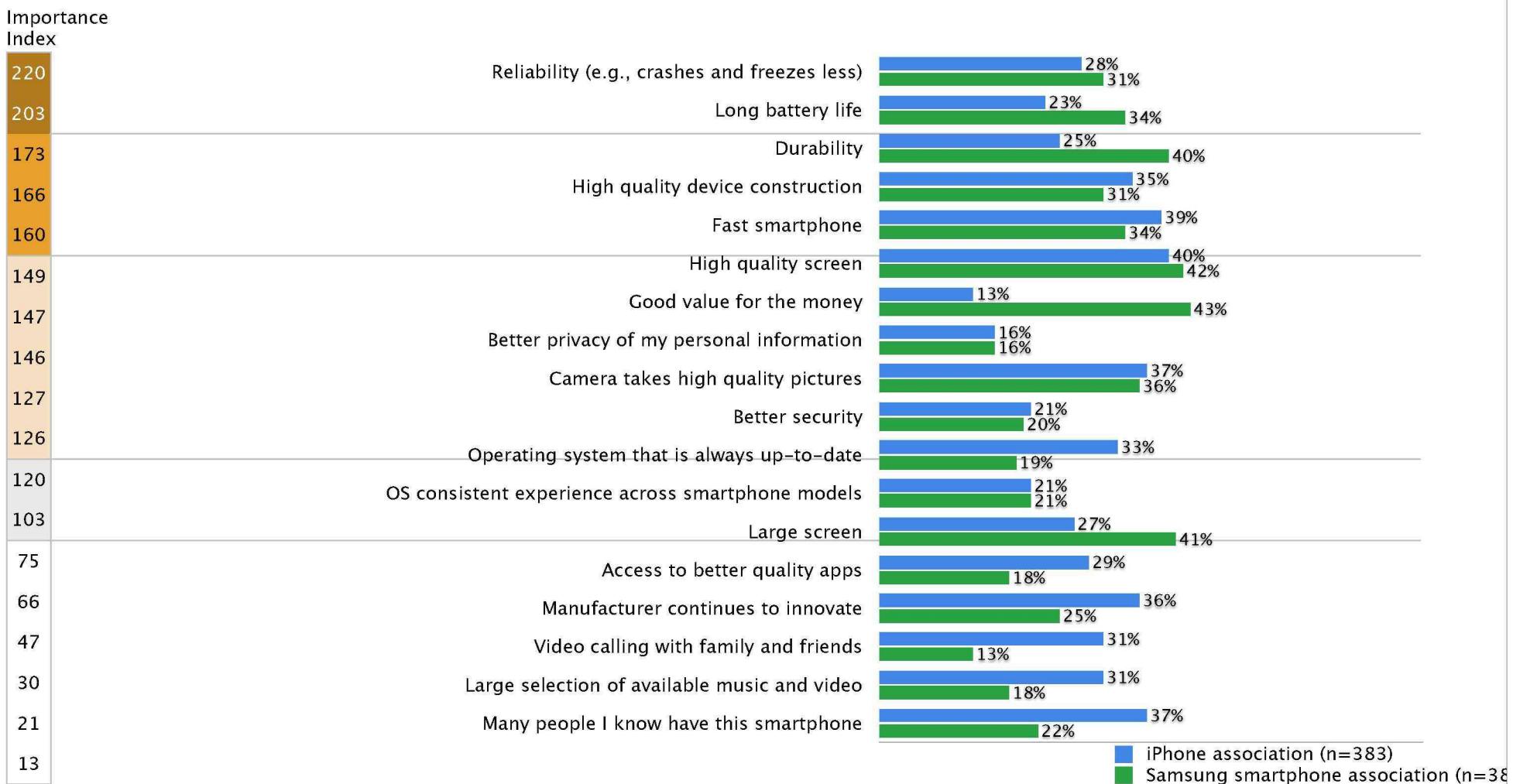
Base: UK iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

Base: UK iPhone owners (switchers) who owned a Samsung smartphone before their iPhone or seriously considered Samsung when switching to iPhone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

iPhone vs. Samsung smartphone brand associations (UK potential switchers)



Base: UK Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

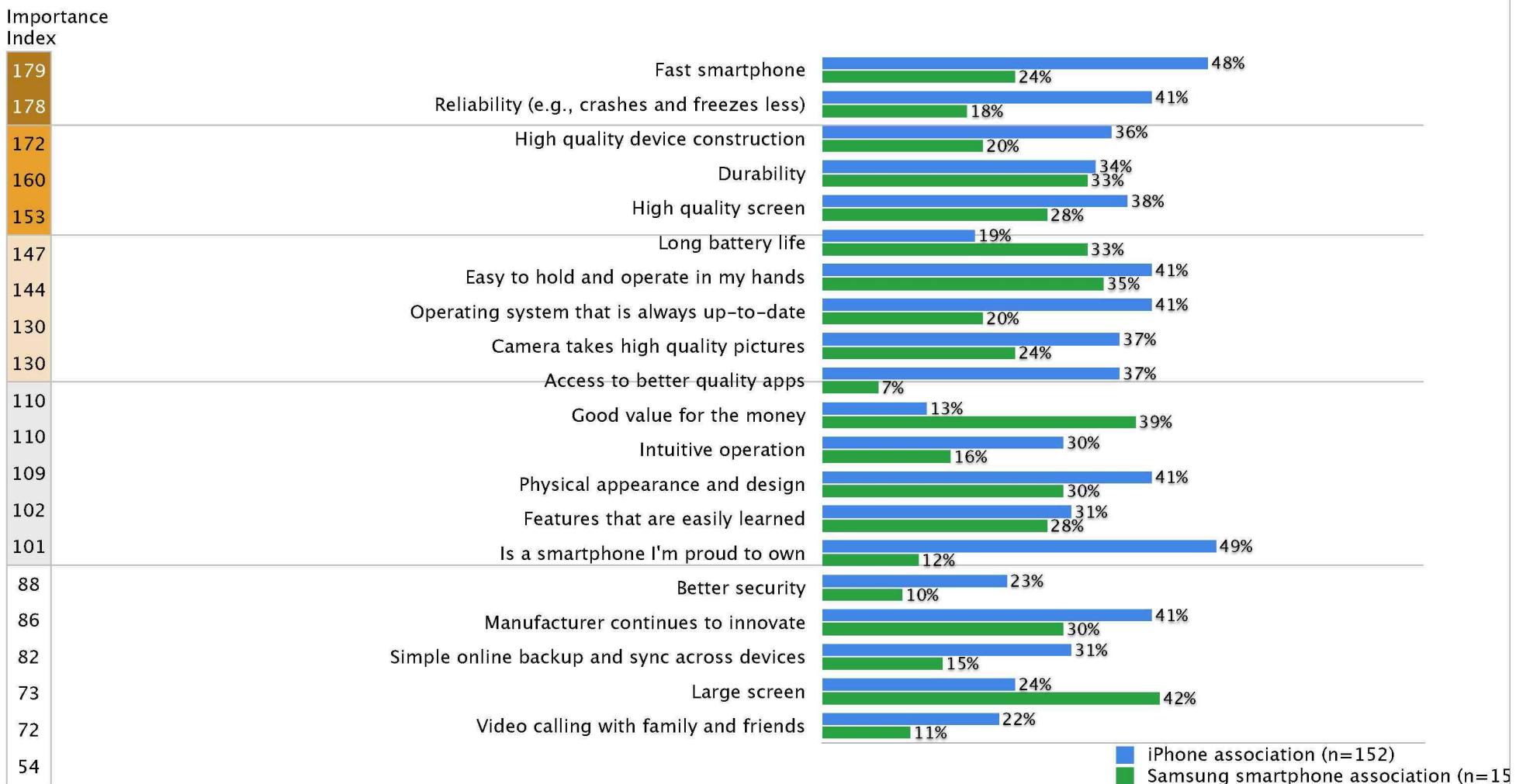
Base: UK Android smartphone owners (potential switchers) who currently own a Samsung smartphone or are seriously considering Samsung as their next smartphone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

APPLE
CONFIDENTIAL

15

iPhone vs. Samsung smartphone brand associations (France switchers)



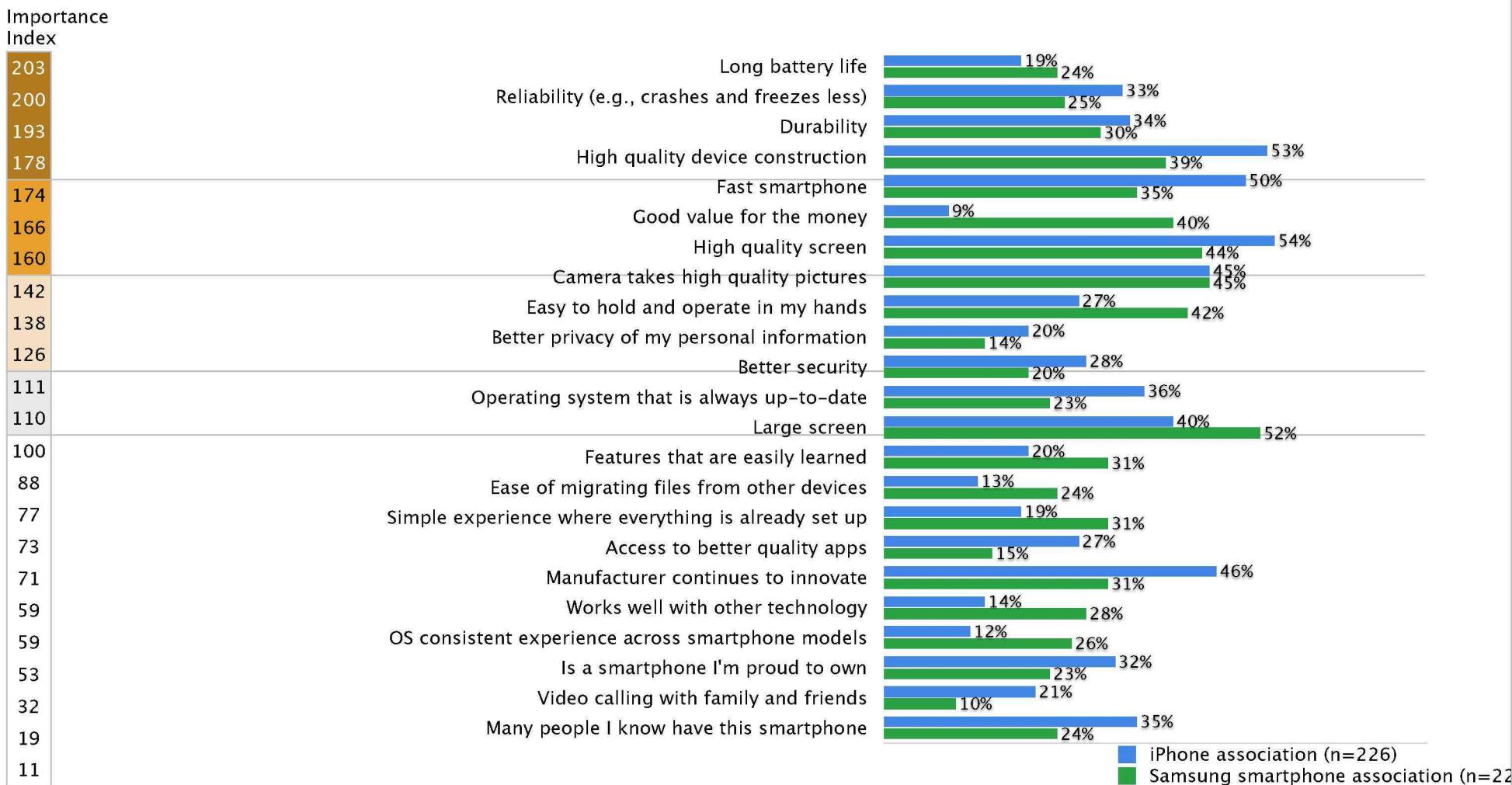
Base: France iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

Base: France iPhone owners (switchers) who owned a Samsung smartphone before their iPhone or seriously considered Samsung when switching to iPhone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

iPhone vs. Samsung smartphone brand associations (France potential switchers)



Base: France Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

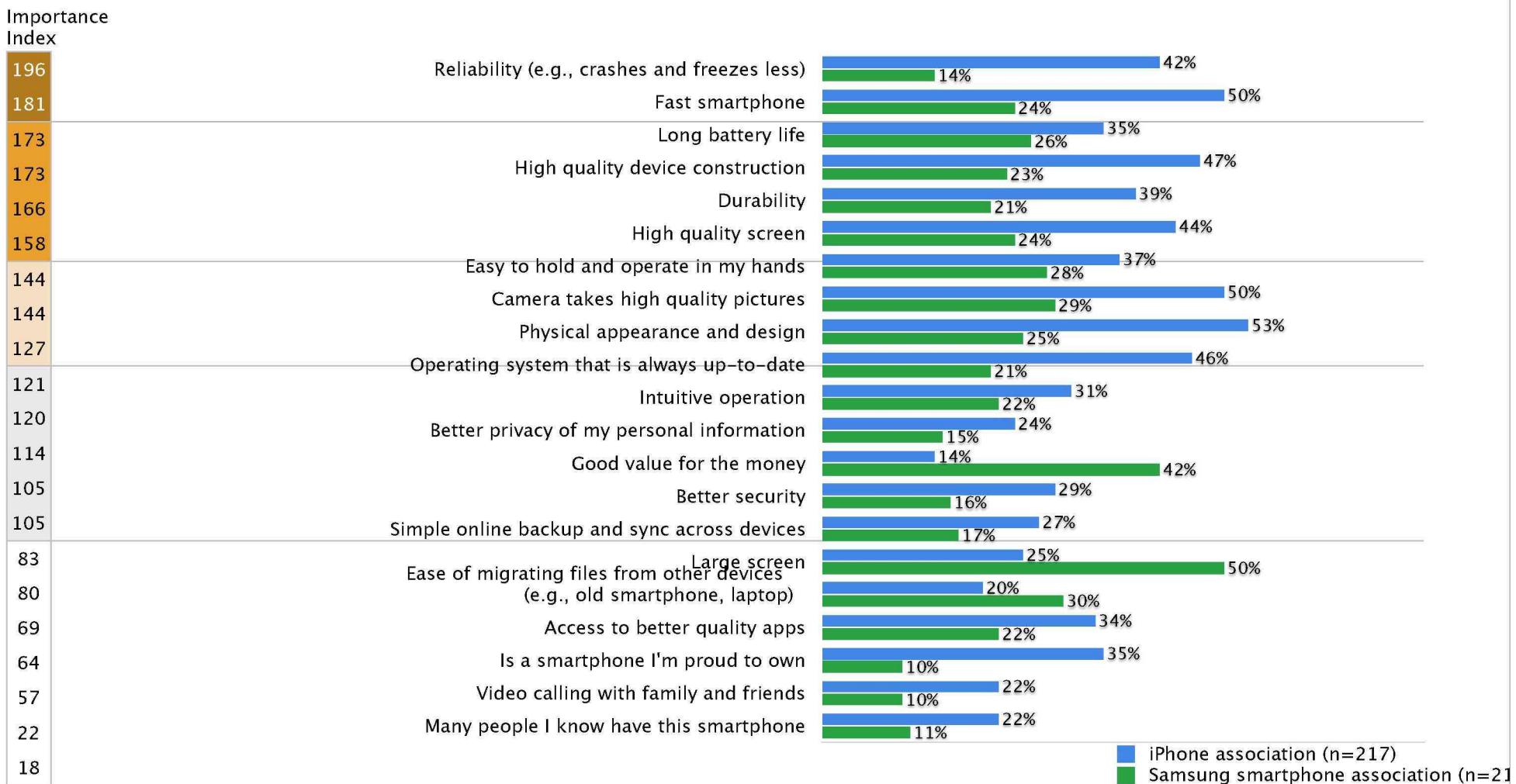
Base: France Android smartphone owners (potential switchers) who currently own a Samsung smartphone or are seriously considering Samsung as their next smartphone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

APPLE
CONFIDENTIAL

17

iPhone vs. Samsung smartphone brand associations (Germany switchers)



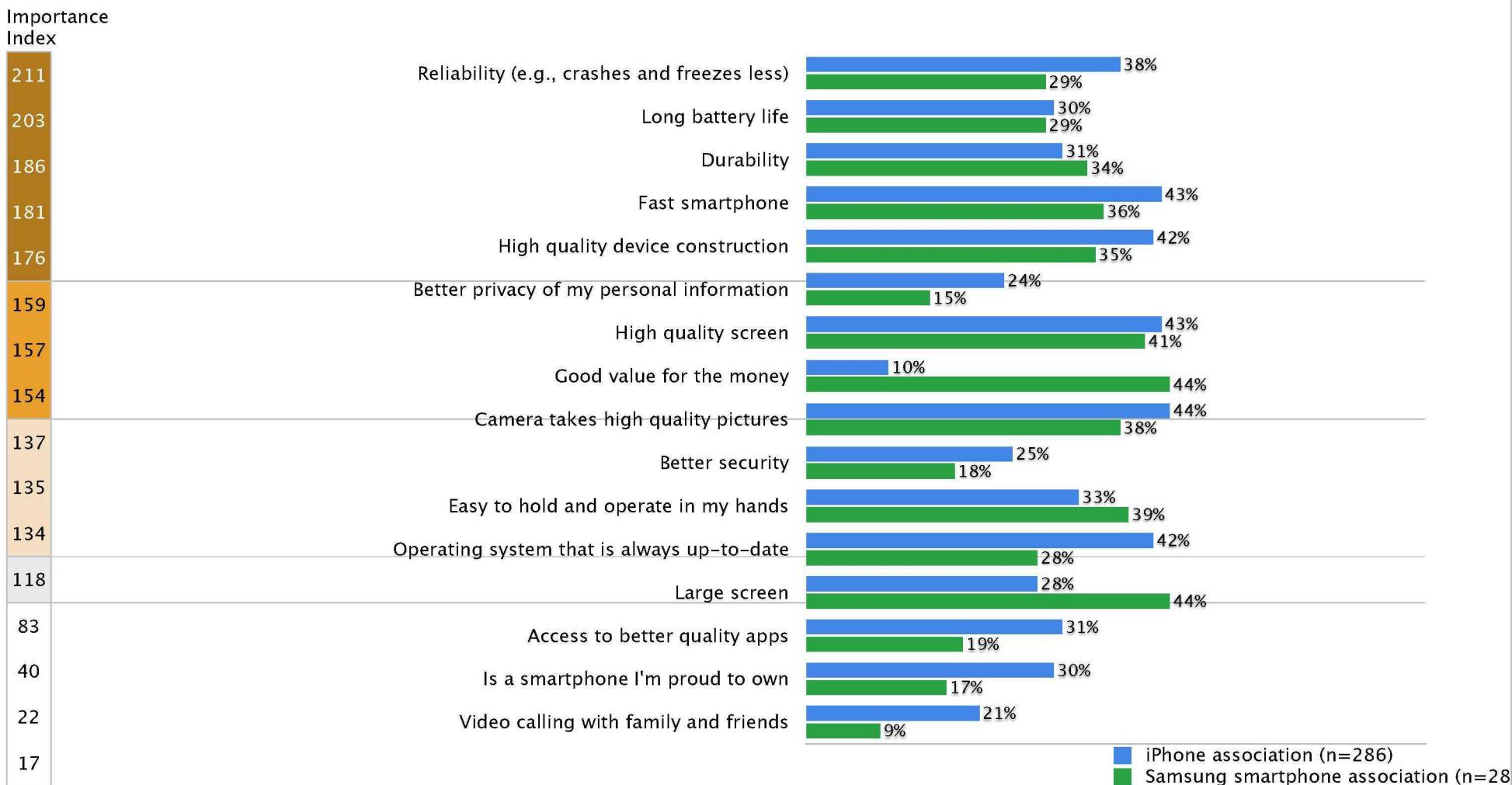
Base: Germany iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

Base: Germany iPhone owners (switchers) who owned a Samsung smartphone before their iPhone or seriously considered Samsung when switching to iPhone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

iPhone vs. Samsung smartphone brand associations (Germany potential switchers)



Base: Germany Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

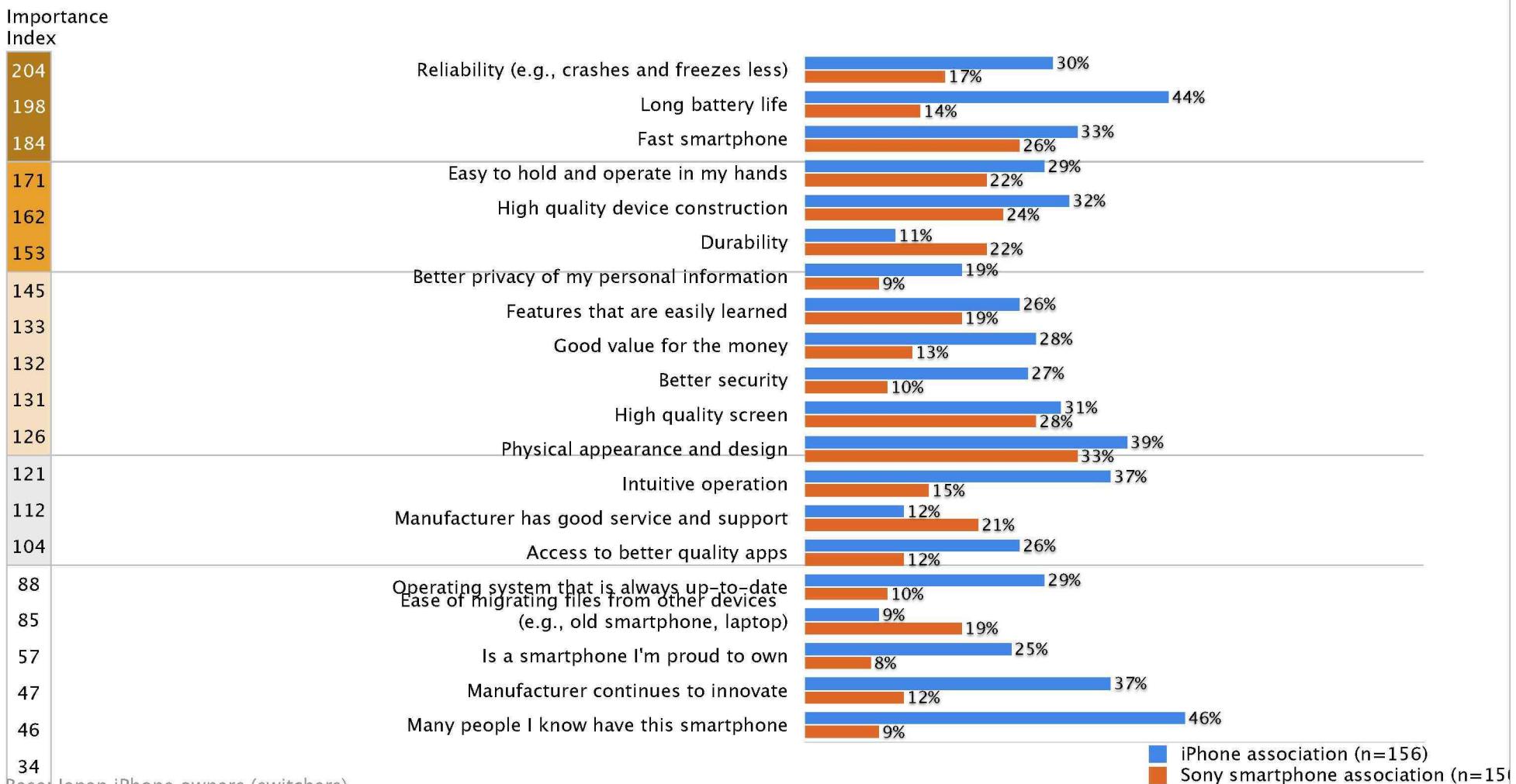
Base: Germany Android smartphone owners (potential switchers) who currently own a Samsung smartphone or are seriously considering Samsung as their next smartphone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison brand

APPLE
CONFIDENTIAL 19

iPhone vs. Sony smartphone brand associations (Japan switchers)



Base: Japan iPhone owners (switchers)

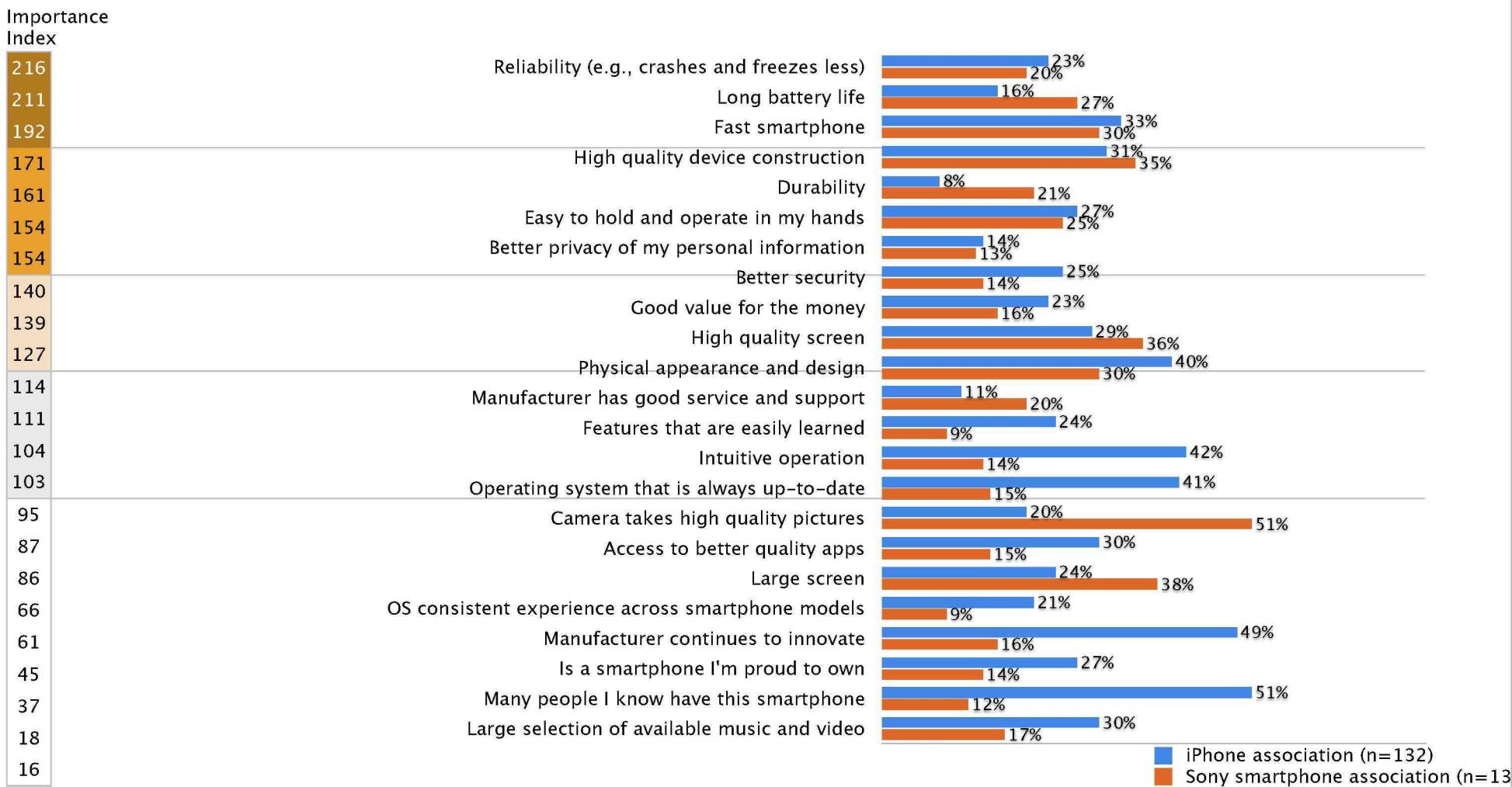
Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

Base: Japan iPhone owners (switchers) who owned a Sony smartphone before their iPhone or seriously considered Sony when switching to iPhone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison

iPhone vs. Sony smartphone brand associations (Japan potential switchers)



Base: Japan Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

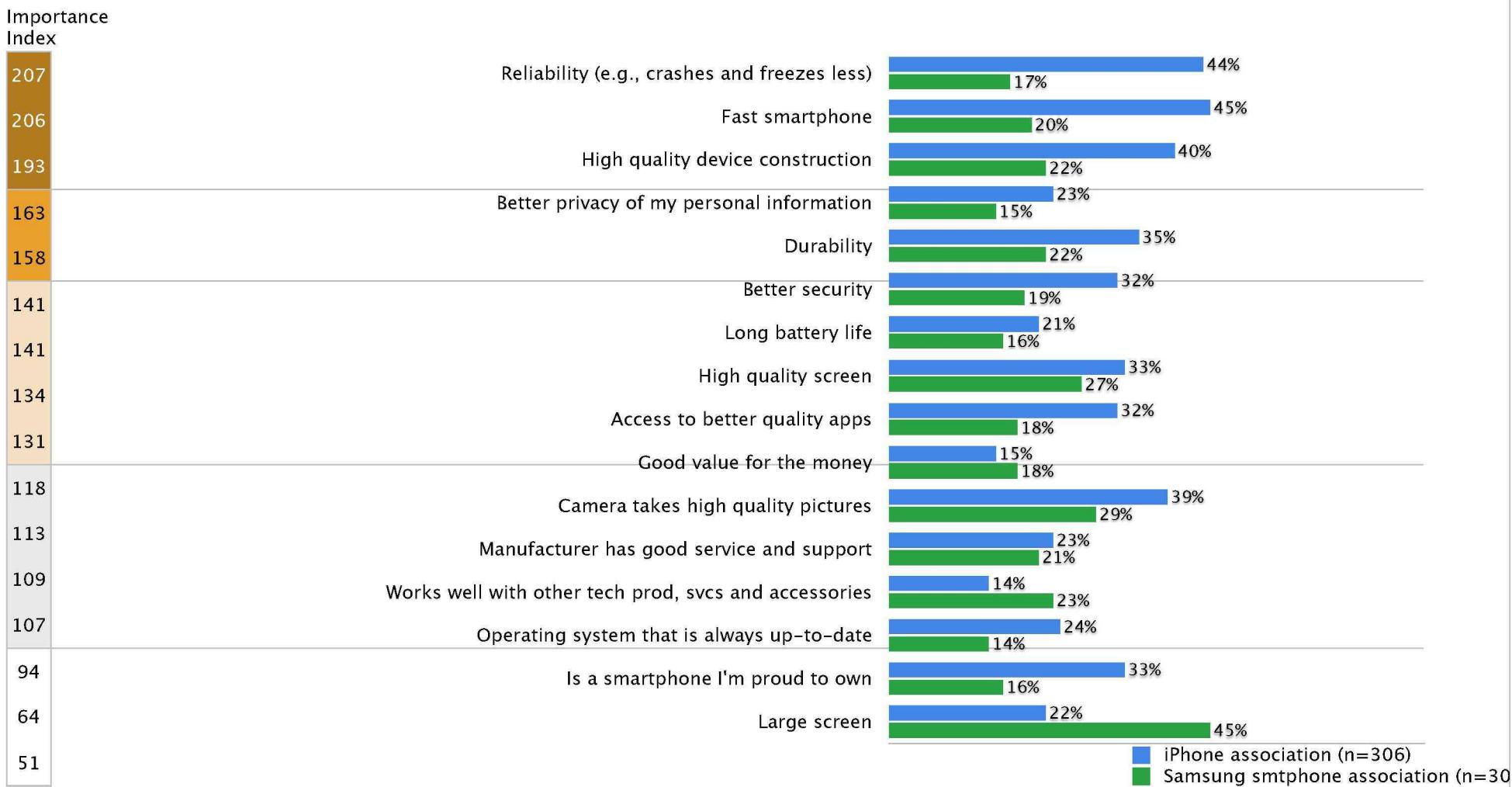
Base: Japan Android smartphone owners (potential switchers) who currently own a Sony smartphone or are seriously considering Sony as their next smartphone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

APPLE
CONFIDENTIAL

21

iPhone vs. Samsung smartphone brand associations (China switchers)



Base: China iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

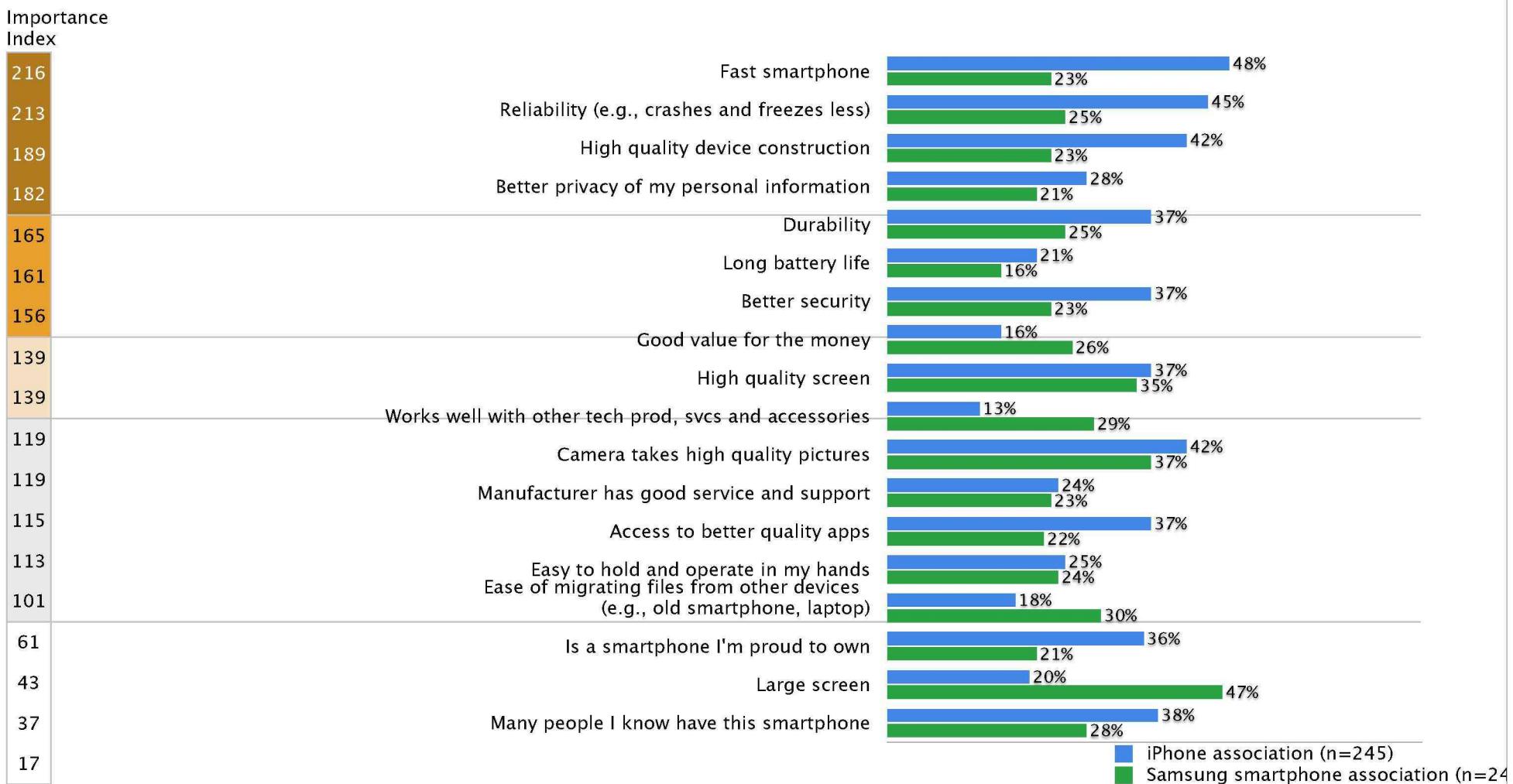
Base: China iPhone owners (switchers) who owned a Samsung smartphone before their iPhone or seriously considered Samsung when switching to iPhone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison brand

APPLE
CONFIDENTIAL 22

iPhone vs. Samsung smartphone brand associations (China potential switchers)



Base: China Android smartphone owners (potential switchers)

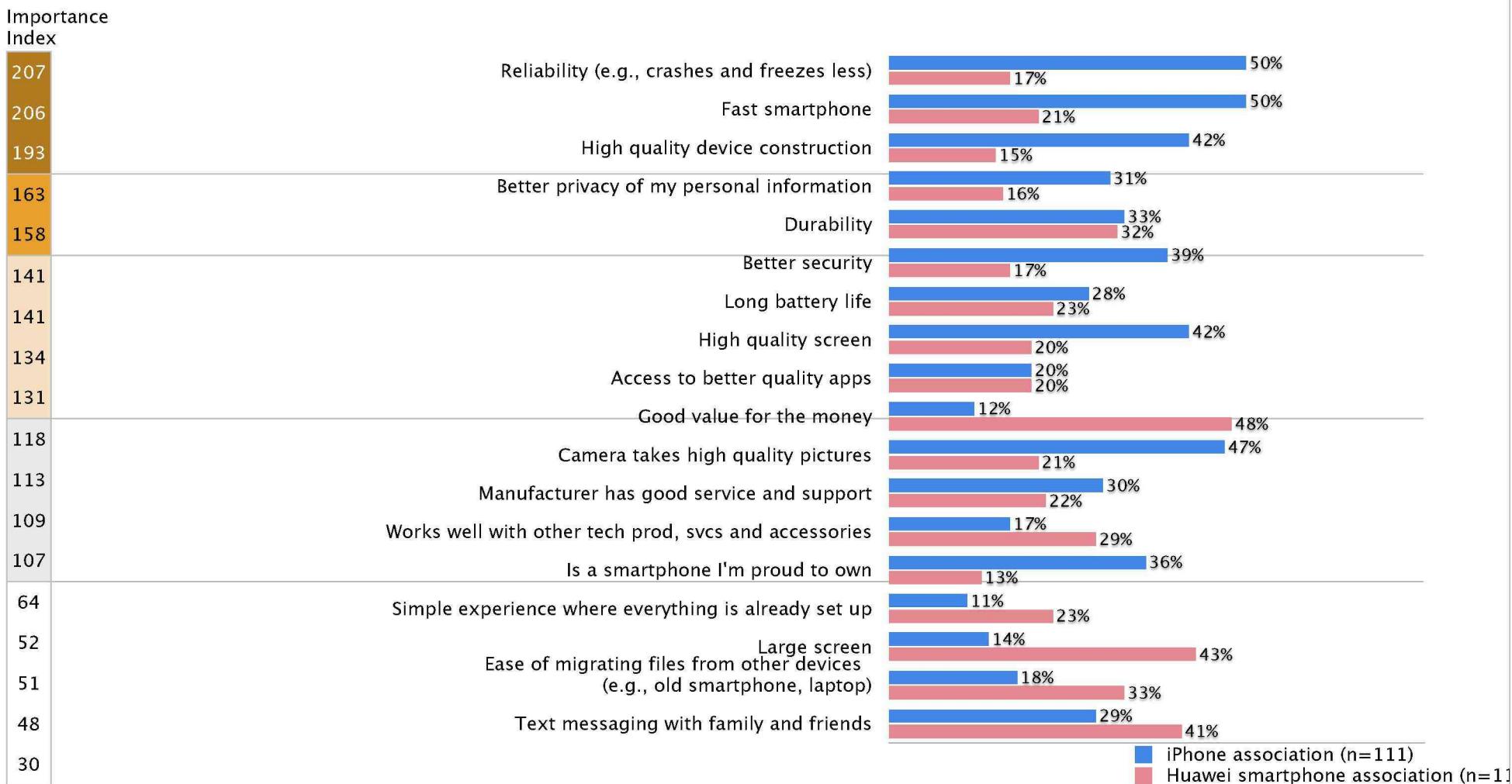
Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

Base: China Android smartphone owners (potential switchers) who currently own a Samsung smartphone or are seriously considering Samsung as their next smartphone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison brand

iPhone vs. Huawei smartphone brand associations (China switchers)



Base: China iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

Base: China iPhone owners (switchers) who owned a Huawei smartphone before their iPhone or seriously considered Huawei when switching to iPhone

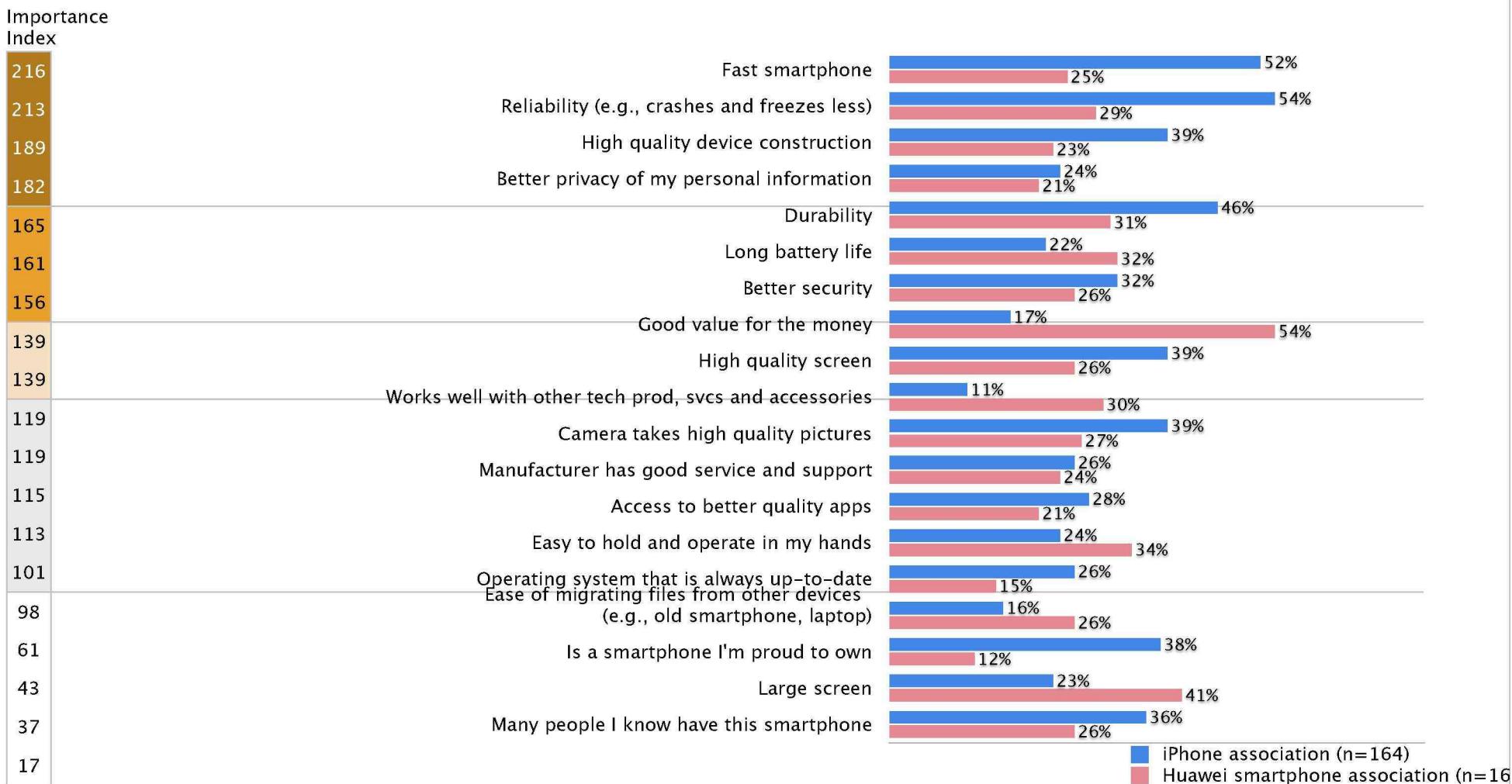
Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison brand

APPLE
CONFIDENTIAL

X

iPhone vs. Huawei smartphone brand associations (China potential switchers)



Base: China Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

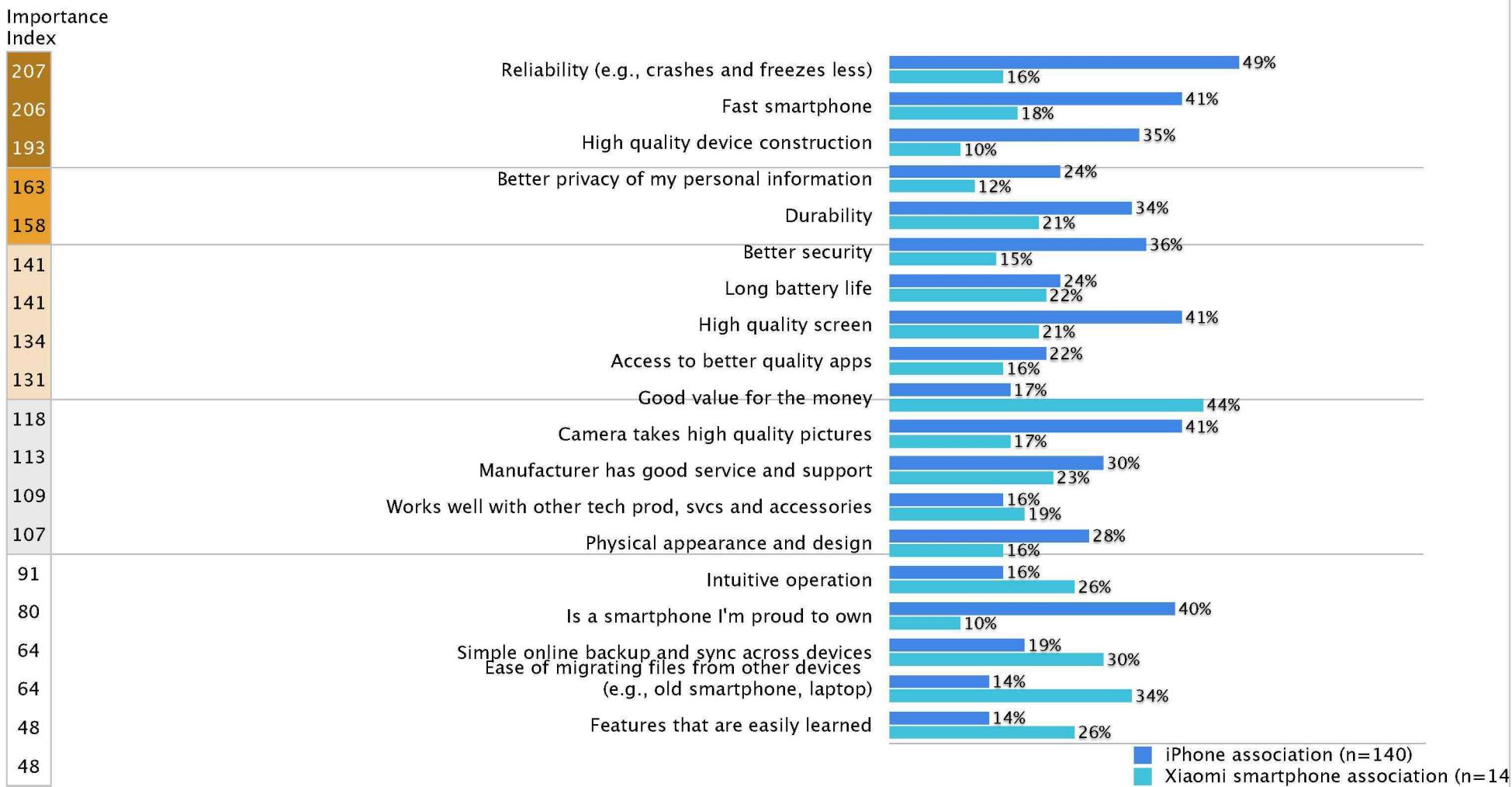
Base: China Android smartphone owners (potential switchers) who currently own a Huawei smartphone or are seriously considering Huawei as their next smartphone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison brand

APPLE
CONFIDENTIAL X

iPhone vs. Xiaomi smartphone brand associations (China switchers)



Base: China iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

Base: China iPhone owners (switchers) who owned a Xiaomi smartphone before their iPhone or seriously considered Xiaomi when switching to iPhone

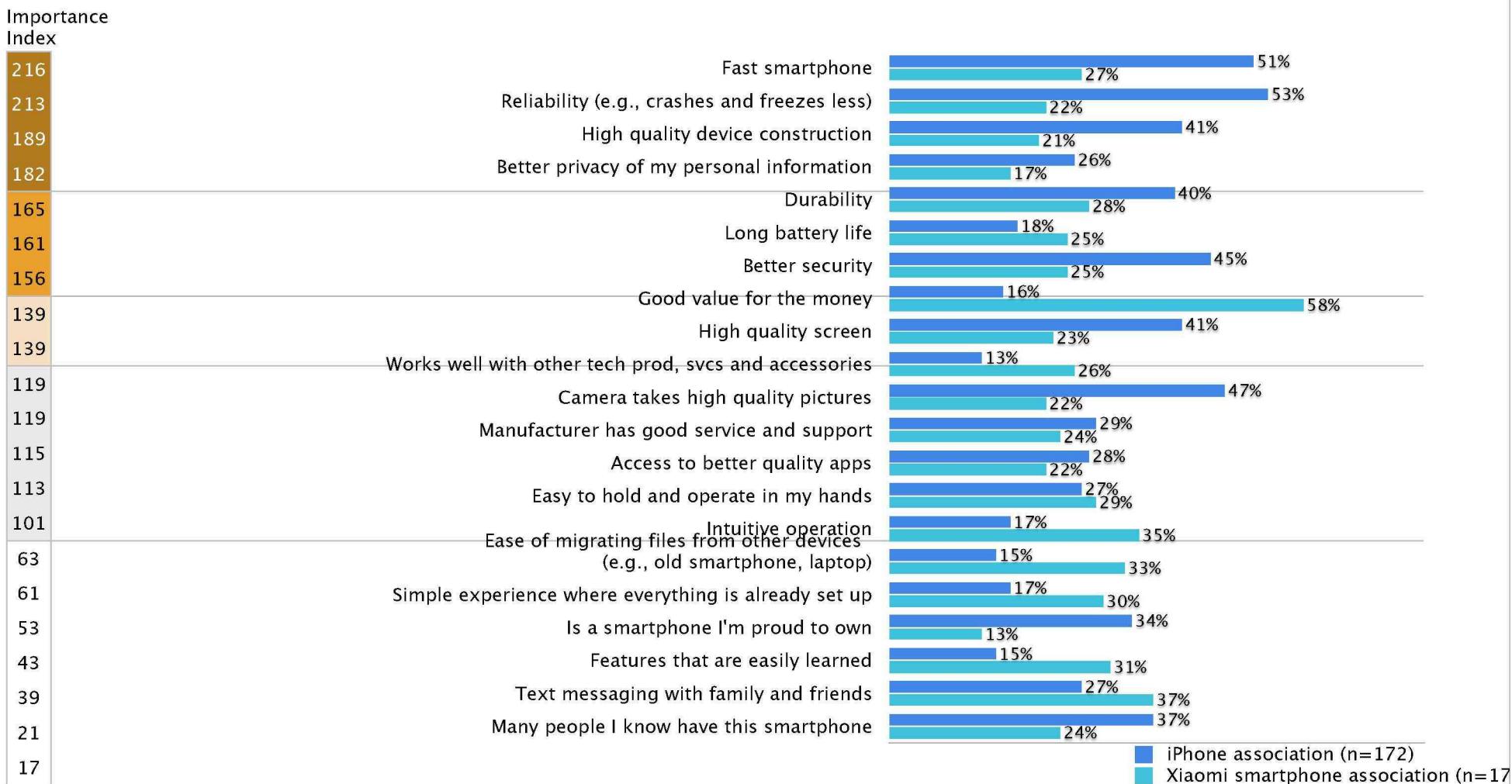
Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison brand

APPLE
CONFIDENTIAL

X

iPhone vs. Xiaomi smartphone brand associations (China potential switchers)



Base: China Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

Base: China Android smartphone owners (potential switchers) who currently own a Xiaomi smartphone or are seriously considering Xiaomi as their next smartphone

Q6: Please indicate which of the following statements best describes smartphones from each of these brands. (select up to 10 per brand)

Showing items with above average (>100) Importance Index or iPhone association +/- 10+ pts. compared to comparison brand

APPLE
CONFIDENTIAL X

Switchers to hero models assign higher importance to screen quality, screen size, long battery life, and quality construction

Differences between iPhone 6/6 Plus and iPhone 4s/5/5c/5s (importance index*)

	US	UK	France	Germany	China
High quality screen	++	++	+++	++	++
Large screen	+++	+++	++	+++	++
Long battery life		++	+	+	+
High quality device construction		+	+	+	+
Manufacturer continues to innovate	+	+	++		+
Physical appearance and design	+	+	+	+	
Intuitive operation		++	+		
Is a smartphone I'm proud to own		+		+	
Good value for the money	+	+++	+++	++	++
Easy to hold and operate in my hands	+	++	++	+	
Simple experience where everything is already set up for me	+	++	++		++
FaceTime video calling with family and friends	+	+	+		+
iMessage text messaging with family and friends		++	++		++
Features that are easily learned		++	+		+
Ease of migrating files from other devices (e.g., old smartphone,			+	+	+
Many people I know have this smartphone				++	+
Simple online backup (to protect data from loss) and sync across			++		+
Durability		+	+		
Reliability (e.g., crashes and freezes less)		++	+		++
Fast smartphone					+++
Operating system that is always up-to-date	+++	++	+		
Better privacy of my personal information			++		
Manufacturer has good service and support				+	
Large selection of available music and video	+	+	++	+	+
Works well with other technology products, services and accessories			+		
Camera takes high quality pictures				+	+
Better security		+			+
Access to better quality apps					
OS that delivers a consistent experience across smartphone models					

+ 10 pts. higher than other group
++ 20 pts. higher than other group
+++ 30+ pts. higher than other group

iPhone 6/6

Older

Base: iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

*Japan not shown due to low base of older iPhone models

APPLE
CONFIDENTIAL X

Potential switchers less satisfied with their smartphone assign higher importance to camera, ease of handling, and simplicity

Differences between “very satisfied” and less satisfied with current Android smartphone (importance index*)

	US	UK	France	Germany	Japan	China
Camera takes high quality pictures		+++	+	+		+
Easy to hold and operate in my hands		+	+	+	+	+
Good value for the money	+		+++	++		
Simple experience where everything is already set up for me	+	++	+	++	+	
Reliability (e.g., crashes and freezes less)					+	+
Is a smartphone I'm proud to own		+	++	+	+	++
Operating system that is always up-to-date	+	+++	+		++	
Manufacturer continues to innovate		+	+			++
Large selection of available music and video			+		+	
Fast smartphone			+	+		
Intuitive operation			+++	++		+
Long battery life	++		+++		++	
Large screen	+		++		+	
Many people I know have this smartphone	++				+	+
Ease of migrating files from other devices (e.g., old				++		
Works well with other technology products, services and						+
Manufacturer has good service and support	+					
OS that delivers a consistent experience across smartphone				+		
Simple online backup (to protect data from loss) and sync				+		
iMessage text messaging with family and friends			+			
Physical appearance and design	+	+	++	+	++	+
Durability		+	+++	+	++	
Better privacy of my personal information		+	+	++	+	
Better security		+	+	+	+	
Features that are easily learned			+		+	
Access to better quality apps		+	+			
High quality device construction	+			+		
High quality screen			+			+
FaceTime video calling with family and friends	+					+

• 10 pts. higher than other group
 • 20 pts. higher than other group
 • 30+ pts. higher than other group Very Less

Base: Android smartphone owners (potential switchers)

Q5/Q5a. Which of these statements about smartphones do you find most/least important when considering whether to switch to an iPhone smartphone?

APPLE
CONFIDENTIAL X

Drivers of switching to iPhone (by Apple ownership status)

Differences between “using Apple product(s) at time of iPhone acquisition” vs. “not using...” (importance index*)

	US	UK	France	Germany	Japan	China
Works well with other technology products, services and		++	+	++		+
Better privacy of my personal information				+		+
OS that delivers a consistent experience across smartphone	+				+	
Simple online backup (to protect data from loss) and sync	+			++		
Better security				+		+
Large screen	+					+
FaceTime video calling with family and friends		++				+
Good value for the money	+	++	+	+++	+	+
Durability		+		++	++	
Easy to hold and operate in my hands	+		+	++	+	
Reliability (e.g., crashes and freezes less)		++		+	+	+
Camera takes high quality pictures		+		++		
Long battery life	+				+	+
iMessage text messaging with family and friends		+	+			+
Features that are easily learned		+	+		+	
Intuitive operation			+++		+	++
Operating system that is always up-to-date	++	++	+	+	+	++
Is a smartphone I'm proud to own		+	+			++
Large selection of available music and video						+
Manufacturer continues to innovate				+		
Ease of migrating files from other devices (e.g., old	+					
Manufacturer has good service and support		+		+++		
Simple experience where everything is already set up for me		+	++			
High quality screen				+		++
High quality device construction			+			+
Fast smartphone						
Access to better quality apps						
Physical appearance and design						
Many people I know have this smartphone						
• 10 pts. higher than other group	• 20 pts. higher than other group	• 30+ pts. higher than other group	Using	Not using		

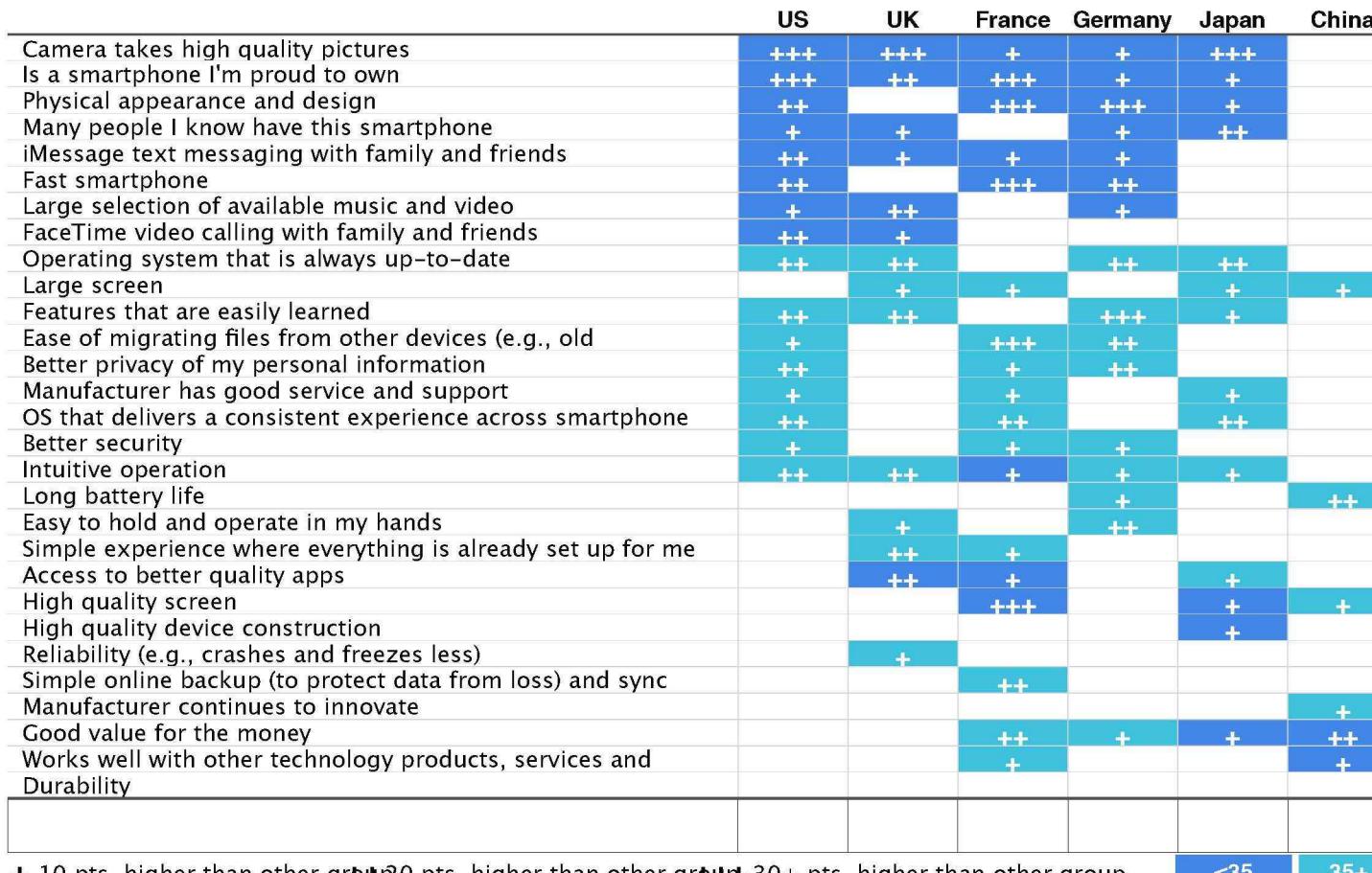
Base: iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

APPLE
CONFIDENTIAL X

Switchers under age 35 assign higher importance to camera, pride in owning, design, iMessage, speed, and content selection

Differences between under 35 and 35+ yrs. old (importance index*)



Base: iPhone owners (switchers)

Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

APPLE
CONFIDENTIAL X

Switchers who are female assign more importance to durability, privacy of personal information, simplicity, and camera

Differences between males and females (importance index*)

	US	UK	France	Germany	Japan	China
Durability		+	+		+	+
Better privacy of my personal information	+		++	+	+	
Simple online backup (to protect data from loss) and sync	++		++	++	+	
Camera takes high quality pictures	+	+	++	+	+++	
Simple experience where everything is already set up for me		++	+	+	++	+
Features that are easily learned		+++	++		+++	
Ease of migrating files from other devices (e.g., old)	+		+	++		
iMessage text messaging with family and friends		+	+	+		
FaceTime video calling with family and friends		+	+	+		
Manufacturer continues to innovate	+	++	++	++	+	
Large screen	+++	++	+	+++	+	
High quality screen	+	+	+	++		
High quality device construction		+	++	++	+	
Manufacturer has good service and support		+	+	+		
Operating system that is always up-to-date		+			+++	
Fast smartphone			+	+		
Intuitive operation		+	+	++	++	
Access to better quality apps			+	+	+	++
OS that delivers a consistent experience across smartphone		++				++
Is a smartphone I'm proud to own			++		+	
Reliability (e.g., crashes and freezes less)	+					
Long battery life				+		
Better security	+					
Easy to hold and operate in my hands		+++				
Large selection of available music and video				+		
Works well with other technology products, services and					+	
Physical appearance and design	++		++	+		
Many people I know have this smartphone	+		+		+	
Good value for the money	+	+				

+ 10 pts. higher than other group
++ 20 pts. higher than other group
+++ 30+ pts. higher than other group

Male

Female

Base: iPhone owners (switchers)

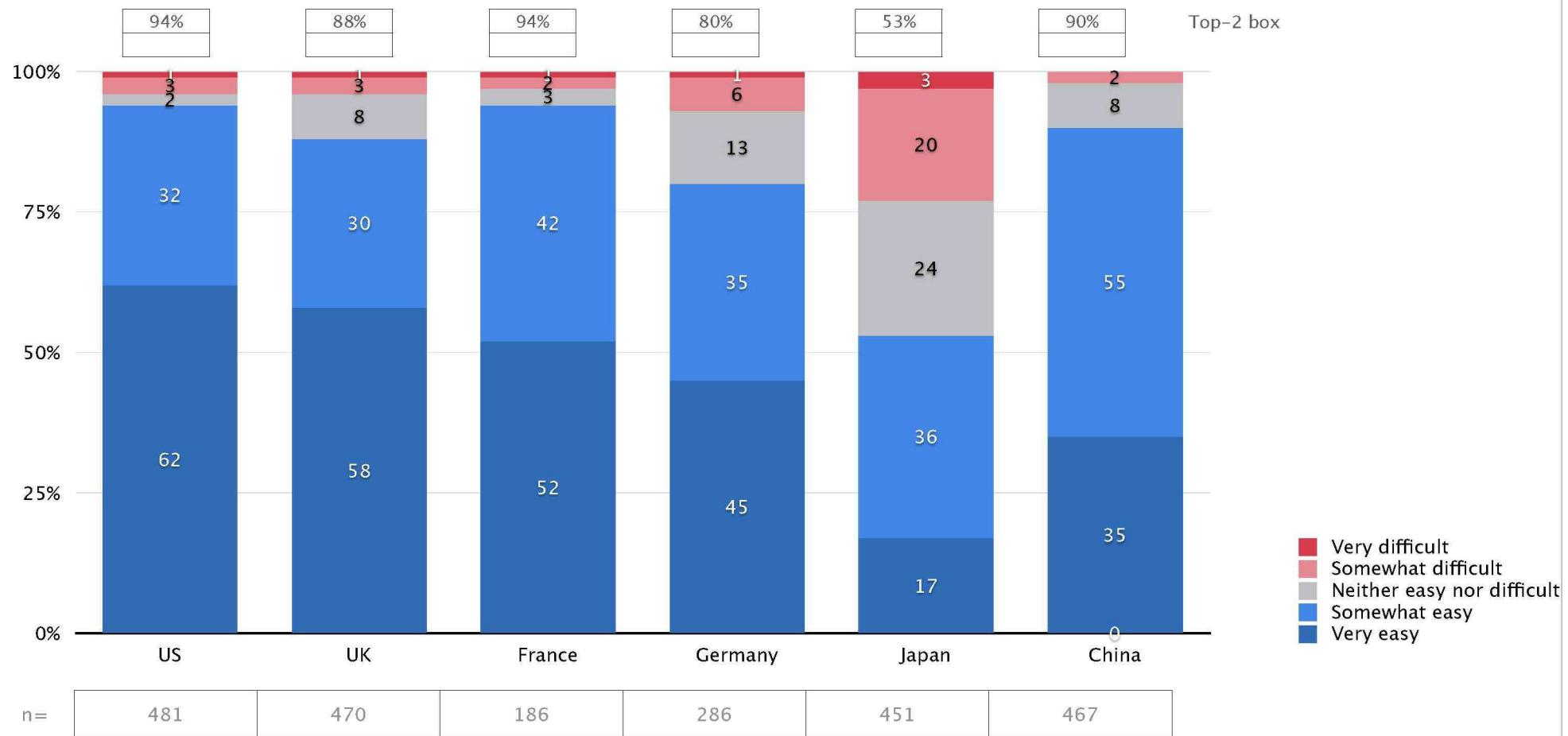
Q5/Q5a. Which of these statements about smartphones was most/least important in your decision to switch to the iPhone?

APPLE
CONFIDENTIAL X

Setup and migration

Perceived ease of iPhone setup is generally high among switchers, but lower in Germany and Japan

Ease of iPhone setup (among switchers)



Base: iPhone owners (switchers)

Q9: Think back to when you first acquired your iPhone smartphone. Overall, how easy or difficult was the process of setting up your iPhone smartphone?

CONFIDENTIAL 25

Potential switchers' top setup concerns are contact transfer, photo/video transfer, and getting the apps on their old phone

iPhone setup concerns (top-2 box, among potential switchers)

	US	UK	France	Germany	Japan	China				
Transferring contacts from my old phone	67%	55%	72%	53%	57%	87%				
Transferring photos or videos from my old phone	64%	54%	63%	47%	52%	79%				
Getting the apps I had on my old phone	63%	48%	54%	45%	46%	69%				
Operating system (iOS) updates	51%	37%	43%	22%	33%	77%				
Setting up email or additional email accounts	49%	36%	53%	27%	46%	60%				
Transferring music from my old phone	48%	33%	36%	32%	30%	52%				
Transferring text messages from my old phone	42%	37%	46%	40%	39%	57%				
Transferring calendar entries from my old phone	42%	32%	33%	32%	30%	46%				
Using the App Store	40%	22%	26%	16%	23%	76%				
Using iTunes	37%	20%	24%	21%	20%	62%				
n=	483	470	276	339	261	461				
%	10	20	30	40	50	60	70	80	90	100

Base: US Android smartphone owners (potential switchers)

Q18: How concerned or unconcerned are you about each of the following when considering the iPhone for your next smartphone purchase?

APPLE
CONFIDENTIAL

26

iPhone setup tasks performed

iPhone setup tasks performed (among switchers)

	US	UK	France	Germany	Japan	China
Operating system (iOS) updates	97%	95%	95%	95%	85%	97%
Setting up email or additional email accounts	96%	94%	91%	94%	88%	94%
Transferring contacts from my old phone	92%	89%	82%	92%	92%	96%
Getting the apps I had on my old phone	84%	80%	81%	89%	73%	89%
Transferring photos or videos from my old phone	79%	70%	69%	81%	69%	93%
Transferring music from my old phone	69%	64%	64%	80%	54%	90%
Transferring calendar entries from my old phone	67%	60%	53%	76%	55%	88%
Transferring text messages from my old phone	67%	60%	53%	72%	61%	89%
n=	481	470	186	286	451	467



Base: iPhone owners (switchers)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

Setting up email accounts and OS updates are the setup tasks with the highest satisfaction levels among switchers

Satisfaction with iPhone setup (top-2 box, among switchers who performed each task)

	US	UK	France	Germany	Japan	China
Setting up email or additional email accounts	88%	85%	85%	81%	45%	72%
Operating system (iOS) updates	88%	81%	88%	85%	56%	79%
Getting the apps I had on my old phone	78%	71%	73%	65%	32%	60%
Transferring contacts from my old phone	78%	68%	73%	60%	55%	70%
Transferring photos or videos from my old phone	76%	64%	68%	52%	33%	63%
Transferring calendar entries from my old phone	71%	63%	58%	48%	32%	53%
Transferring music from my old phone	67%	61%	57%	49%	29%	59%
Transferring text messages from my old phone	60%	58%	52%	42%	28%	59%



Base: iPhone owners (switchers) who performed task (base sizes vary by task)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL 27

Switchers have higher levels of dissatisfaction with setup tasks around photo, video, music and text message transfer

Dissatisfaction with iPhone setup (bottom-2 box, among switchers who performed each task)

	US	UK	France	Germany	Japan	China
Setting up email or additional email accounts	4%	3%	2%	7%	22%	4%
Operating system (iOS) updates	5%	6%	2%	4%	10%	5%
Getting the apps I had on my old phone	11%	10%	9%	14%	28%	14%
Transferring contacts from my old phone	10%	17%	12%	23%	20%	10%
Transferring photos or videos from my old phone	15%	19%	14%	24%	31%	11%
Transferring calendar entries from my old phone	11%	13%	10%	19%	25%	9%
Transferring music from my old phone	16%	20%	18%	28%	24%	12%
Transferring text messages from my old phone	18%	21%	22%	25%	26%	14%



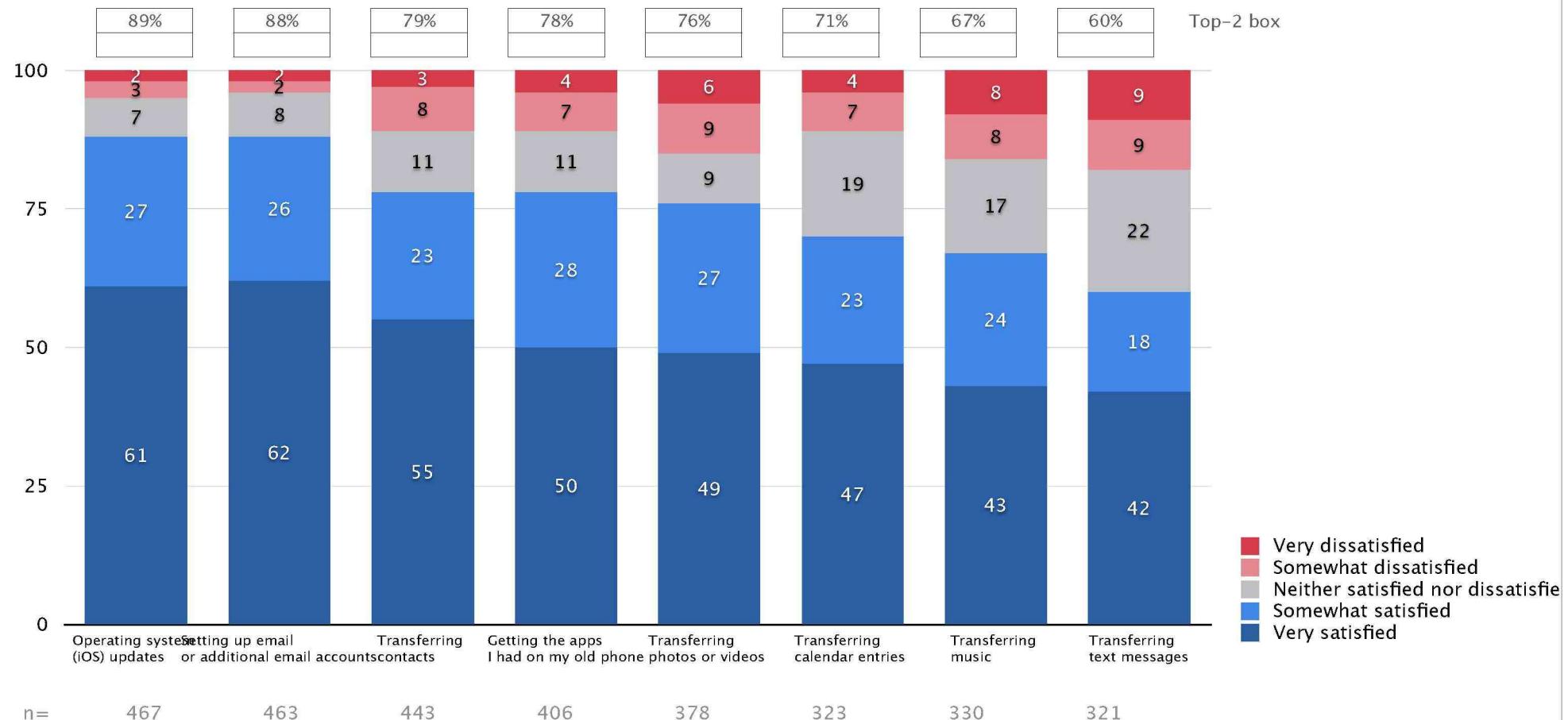
Base: iPhone owners (switchers) who performed task (base sizes vary by task)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL 28

Satisfaction with iPhone setup tasks (US)

Satisfaction with iPhone setup tasks (among US switchers who performed task)



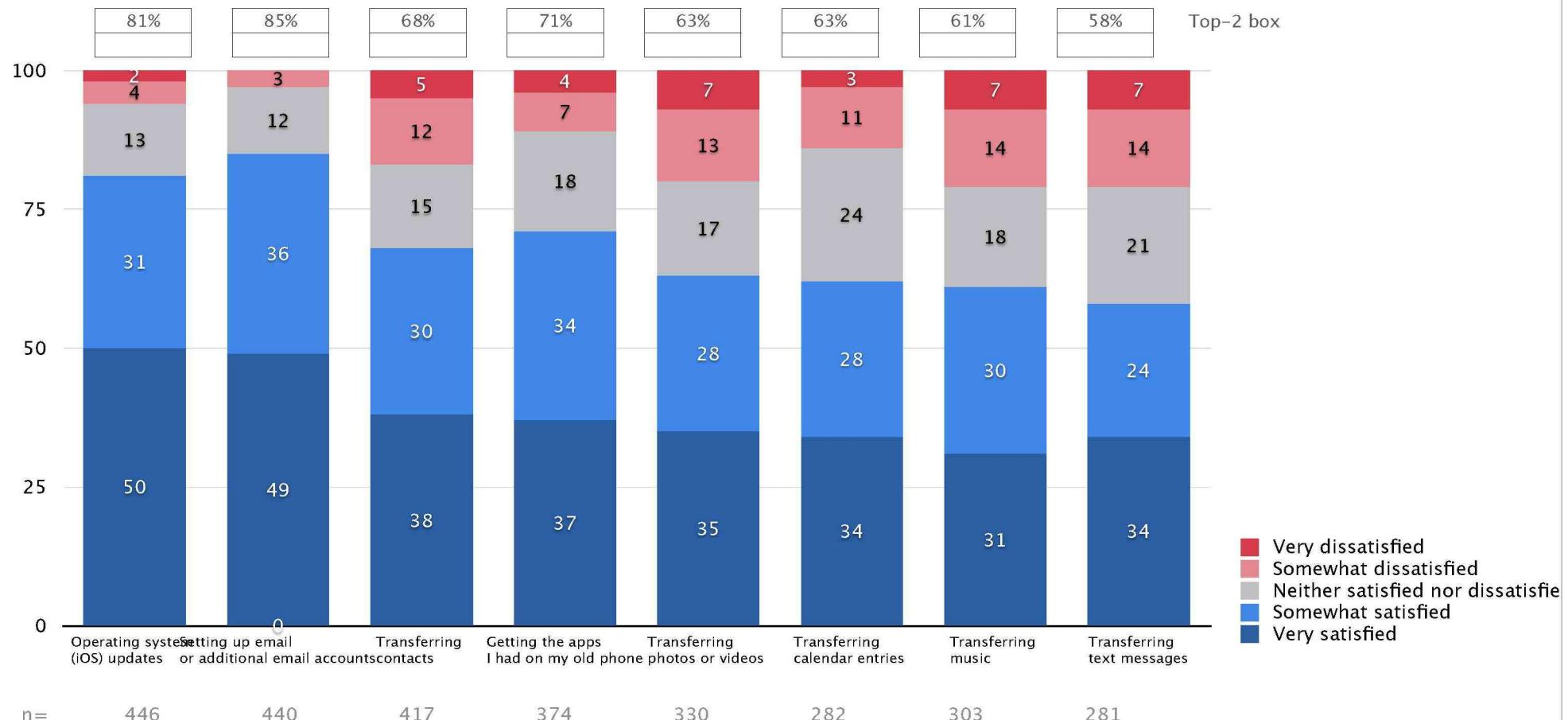
Base: US iPhone owners (switchers) who performed task (base sizes vary by task)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with iPhone setup tasks (UK)

Satisfaction with iPhone setup tasks (among UK switchers who performed task)



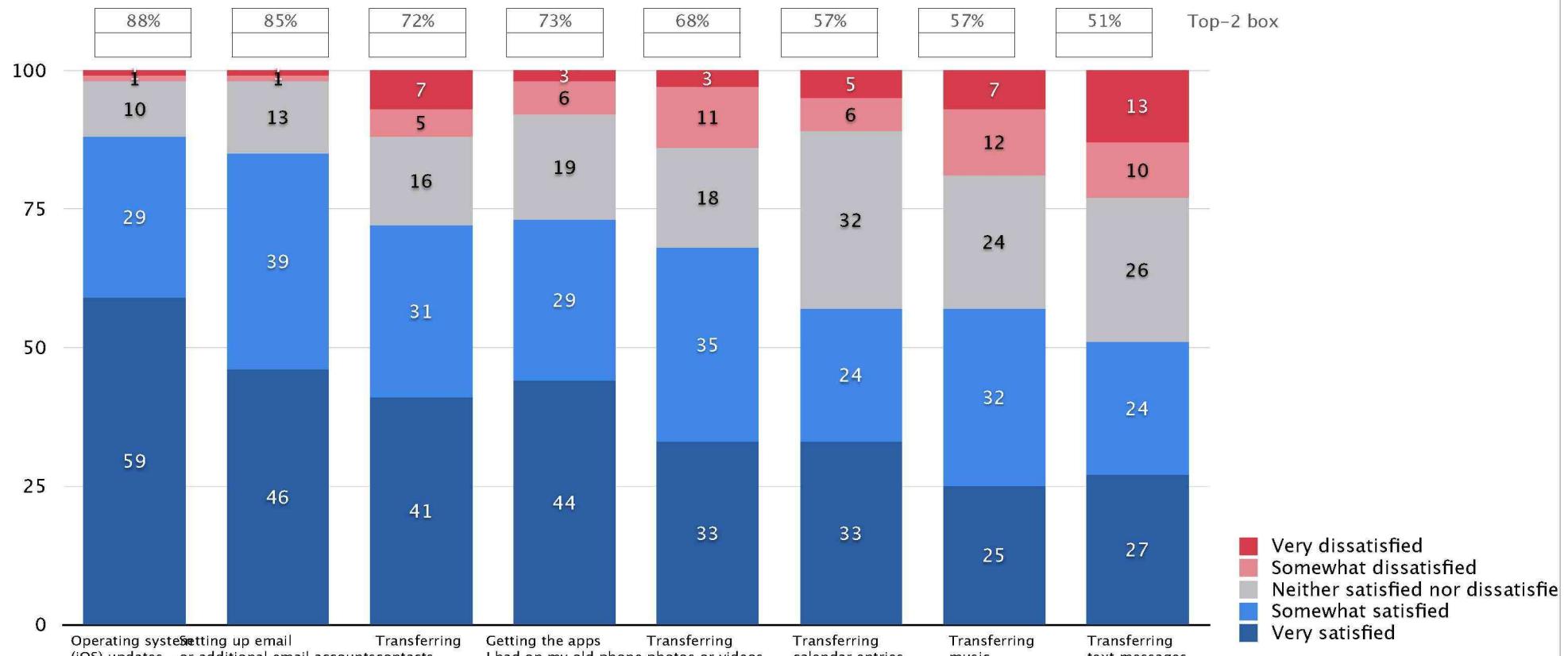
Base: UK iPhone owners (switchers) who performed task (base sizes vary by task)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with iPhone setup tasks (France)

Satisfaction with iPhone setup tasks (among France switchers who performed task)



n= 177 169 153 151 129 99 119 99

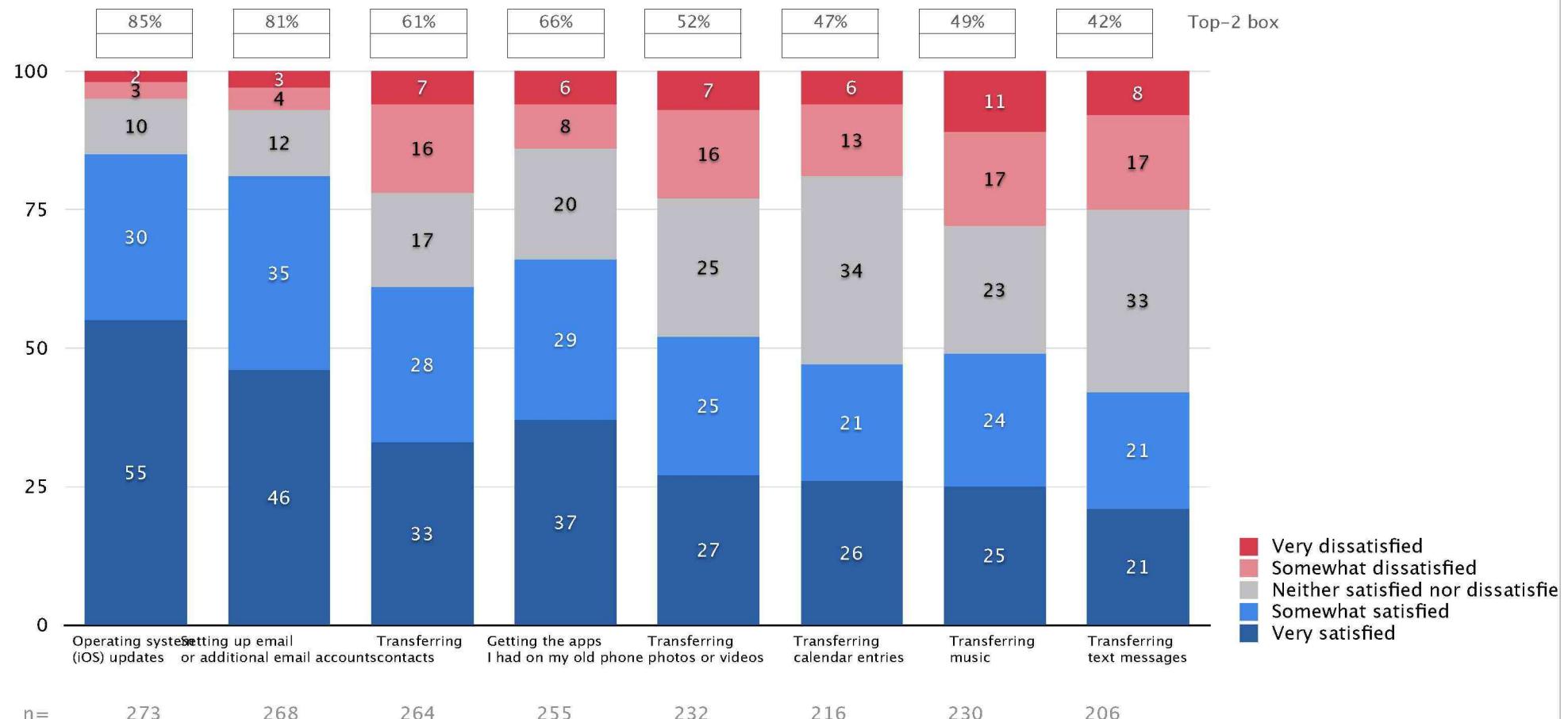
Base: France iPhone owners (switchers) who performed task (base sizes vary by task)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with iPhone setup tasks (Germany)

Satisfaction with iPhone setup tasks (among Germany switchers who performed task)



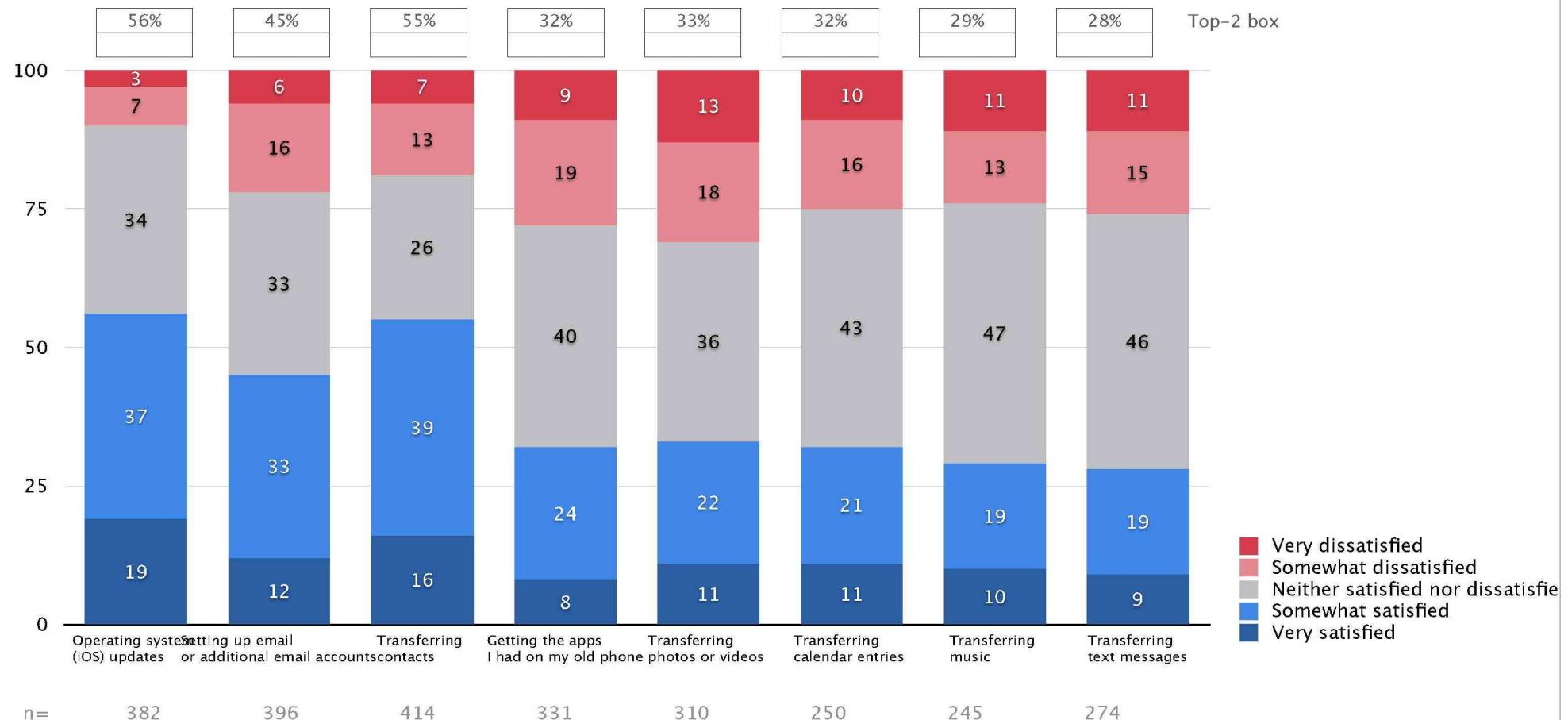
Base: Germany iPhone owners (switchers) who performed task (base sizes vary by task)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with iPhone setup tasks (Japan)

Satisfaction with iPhone setup tasks (among Japan switchers who performed task)



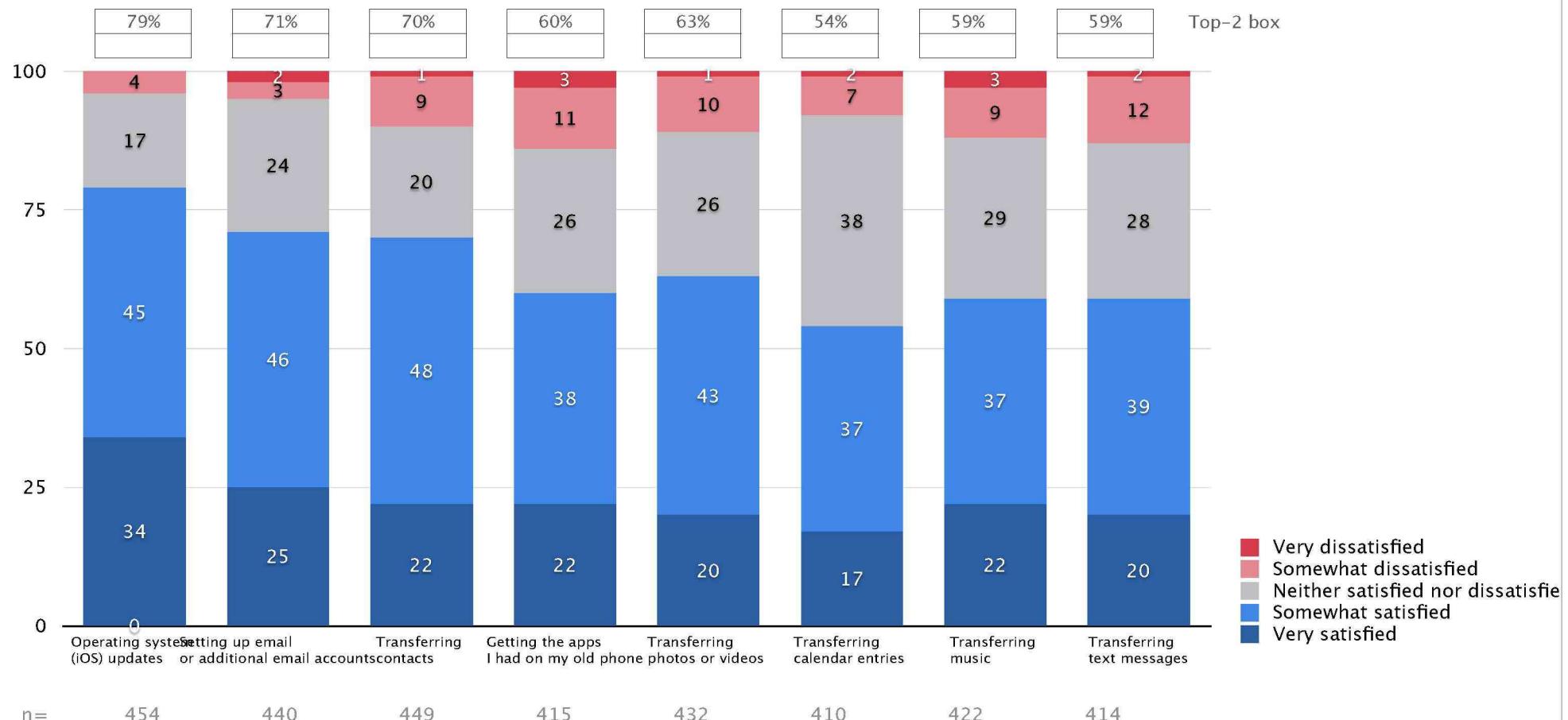
Base: Japan iPhone owners (switchers) who performed task (base sizes vary by task)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with iPhone setup tasks (China)

Satisfaction with iPhone setup tasks (among China switchers who performed task)



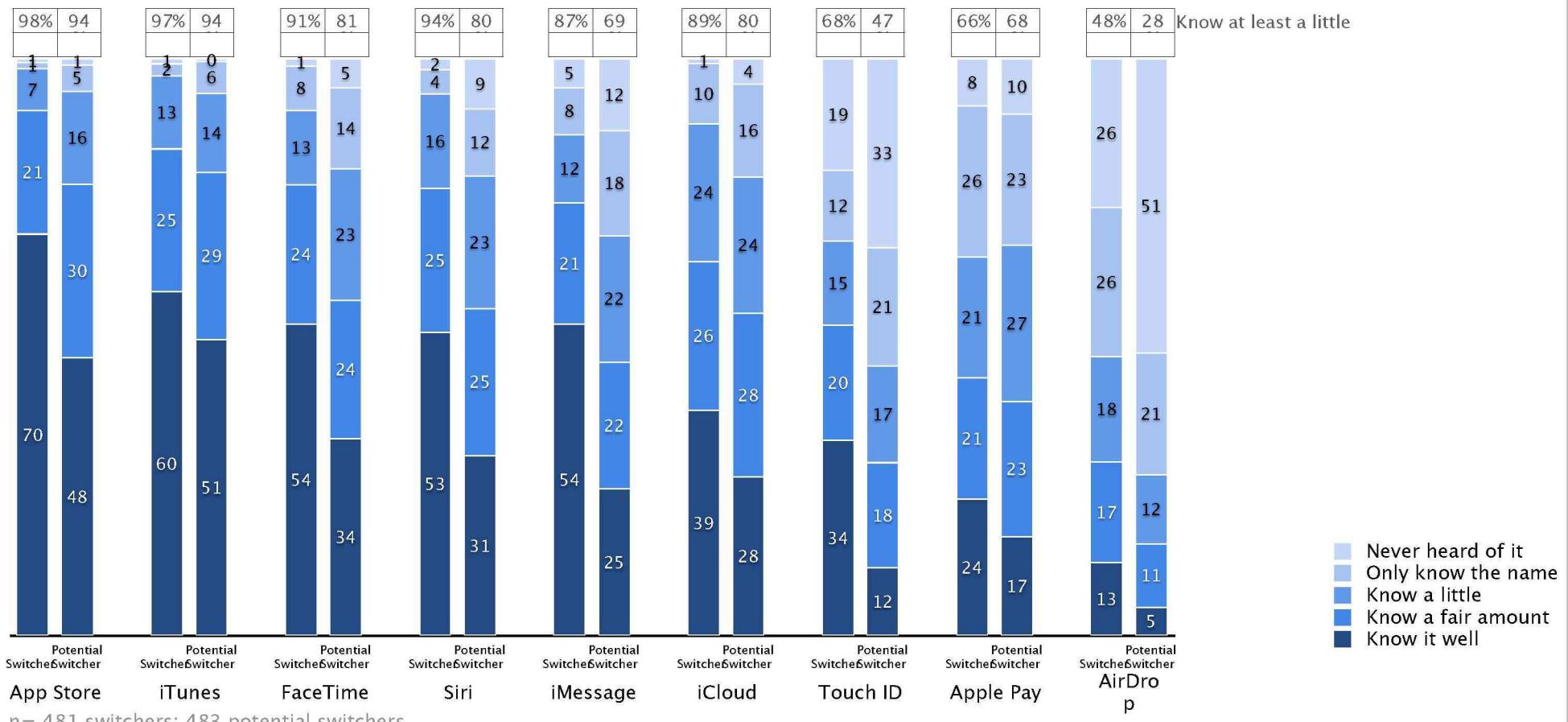
Base: China iPhone owners (switchers) who performed task (base sizes vary by task)

Q10: How satisfied or dissatisfied were you with the following when switching to your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

iPhone features

Apple feature familiarity (US)

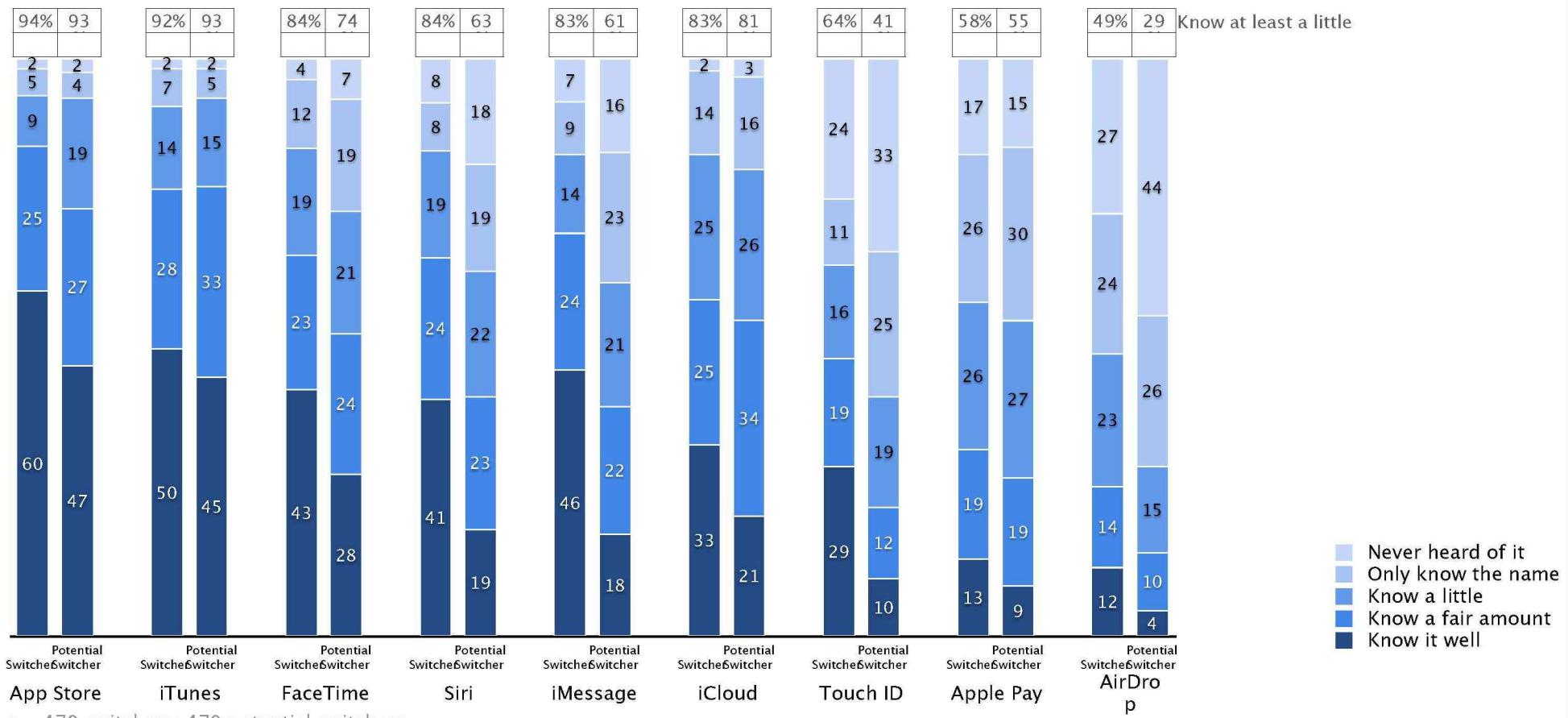


Base: US iPhone owners (switchers); Android smartphone owners (potential switchers)
Q14: How familiar are you with the following?

Never heard of it
Only know the name
Know a little
Know a fair amount
Know it well

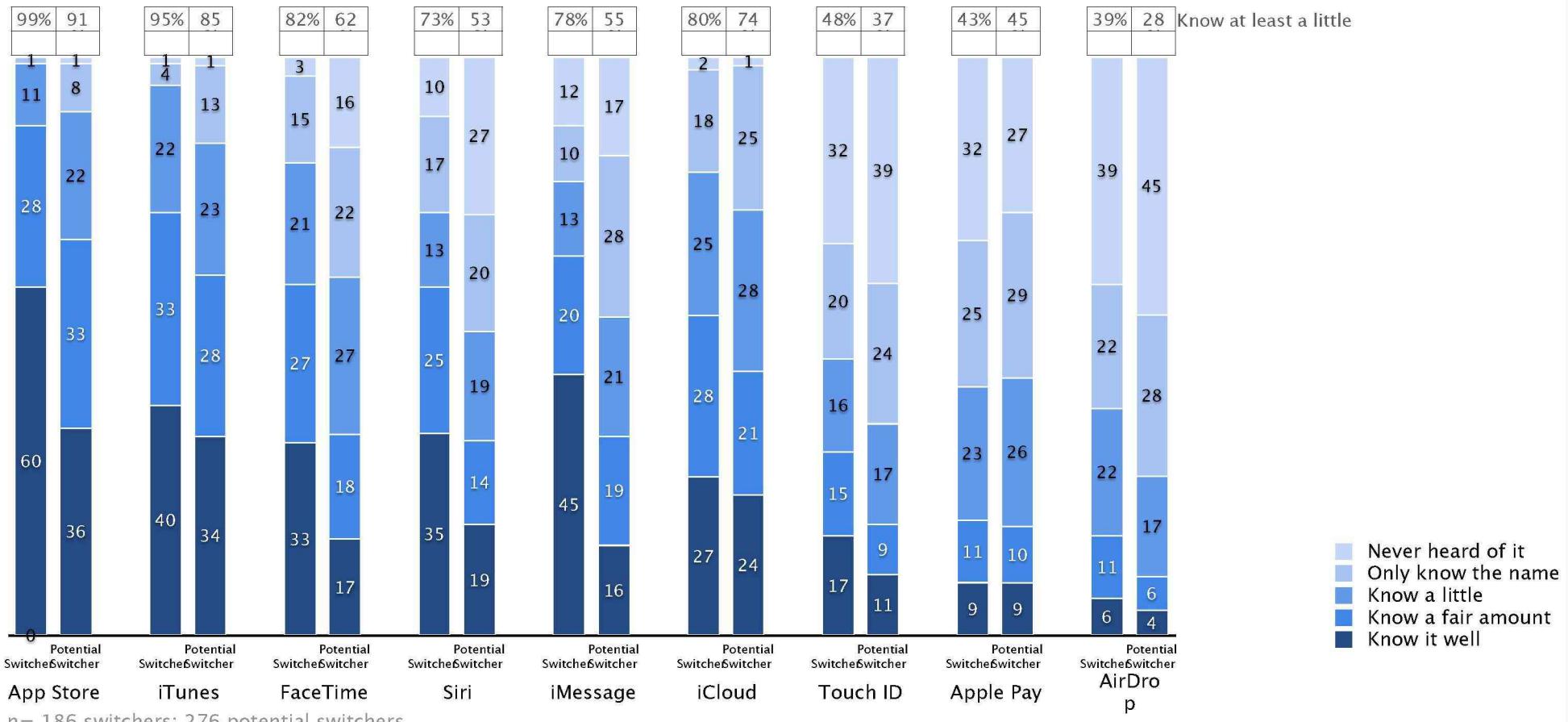
APPLE
CONFIDENTIAL 30

Apple feature familiarity (UK)



Base: UK iPhone owners (switchers); Android smartphone owners (potential switchers)
Q14: How familiar are you with the following?

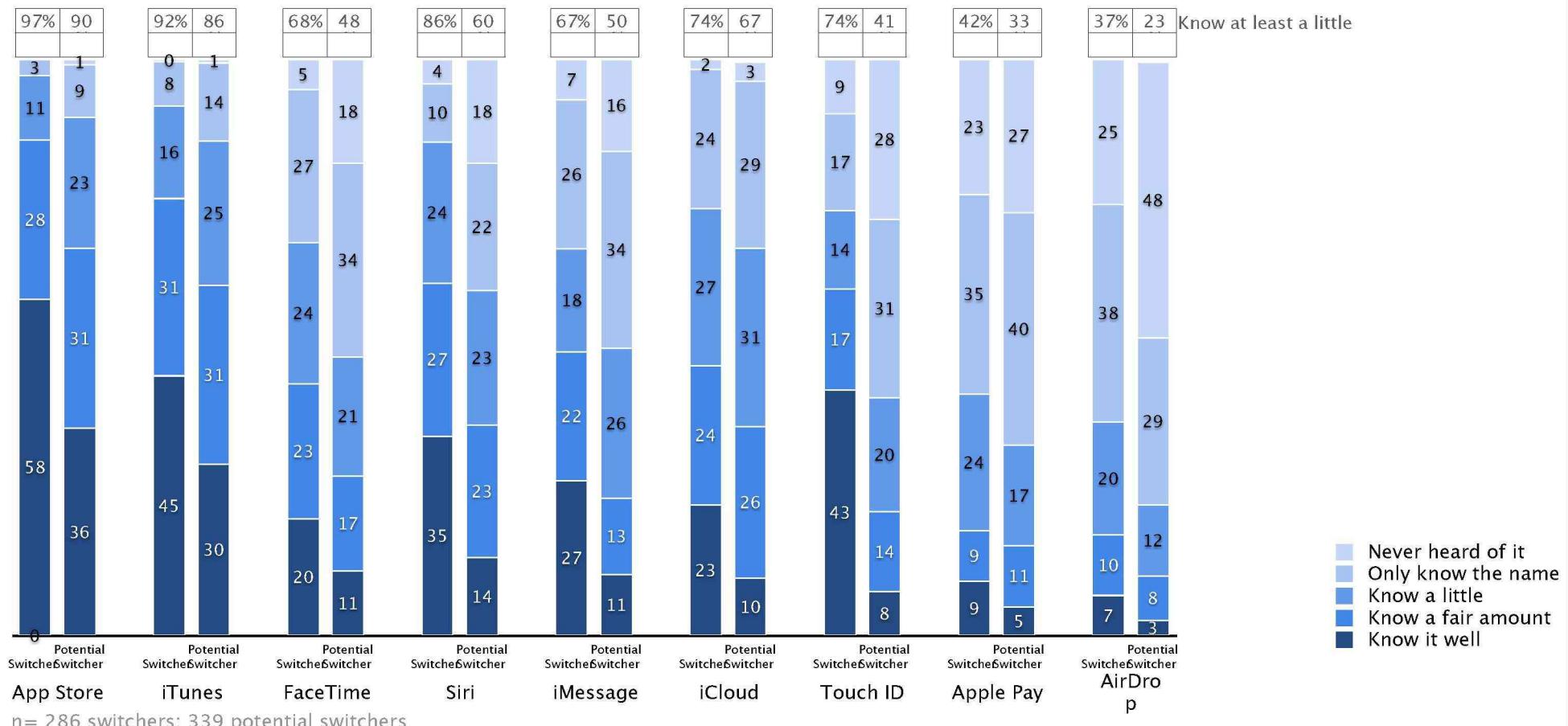
Apple feature familiarity (France)



Base: France iPhone owners (switchers); Android smartphone owners (potential switchers)
Q14: How familiar are you with the following?

APPLE
CONFIDENTIAL 32

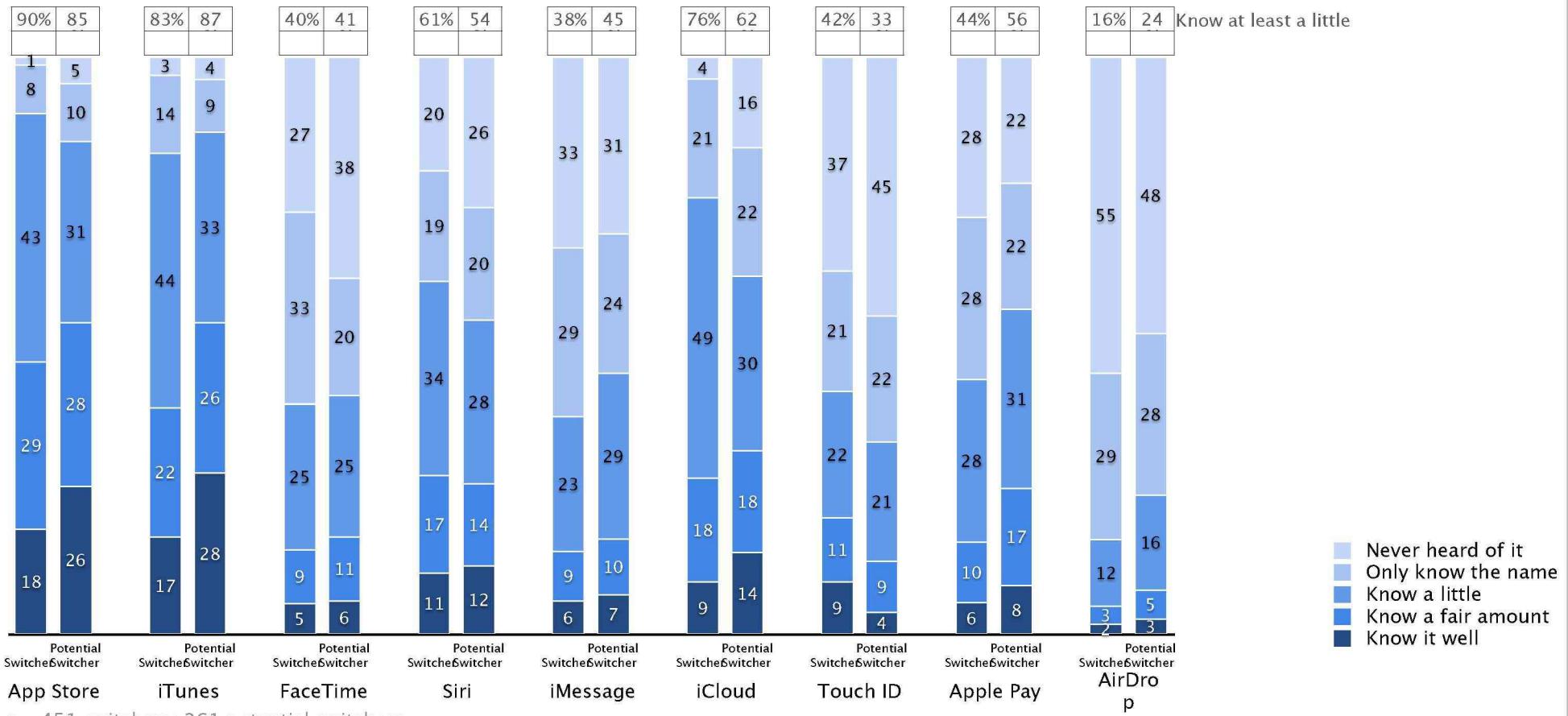
Apple feature familiarity (Germany)



Base: Germany iPhone owners (switchers); Android smartphone owners (potential switchers)
Q14: How familiar are you with the following?

APPLE
CONFIDENTIAL 33

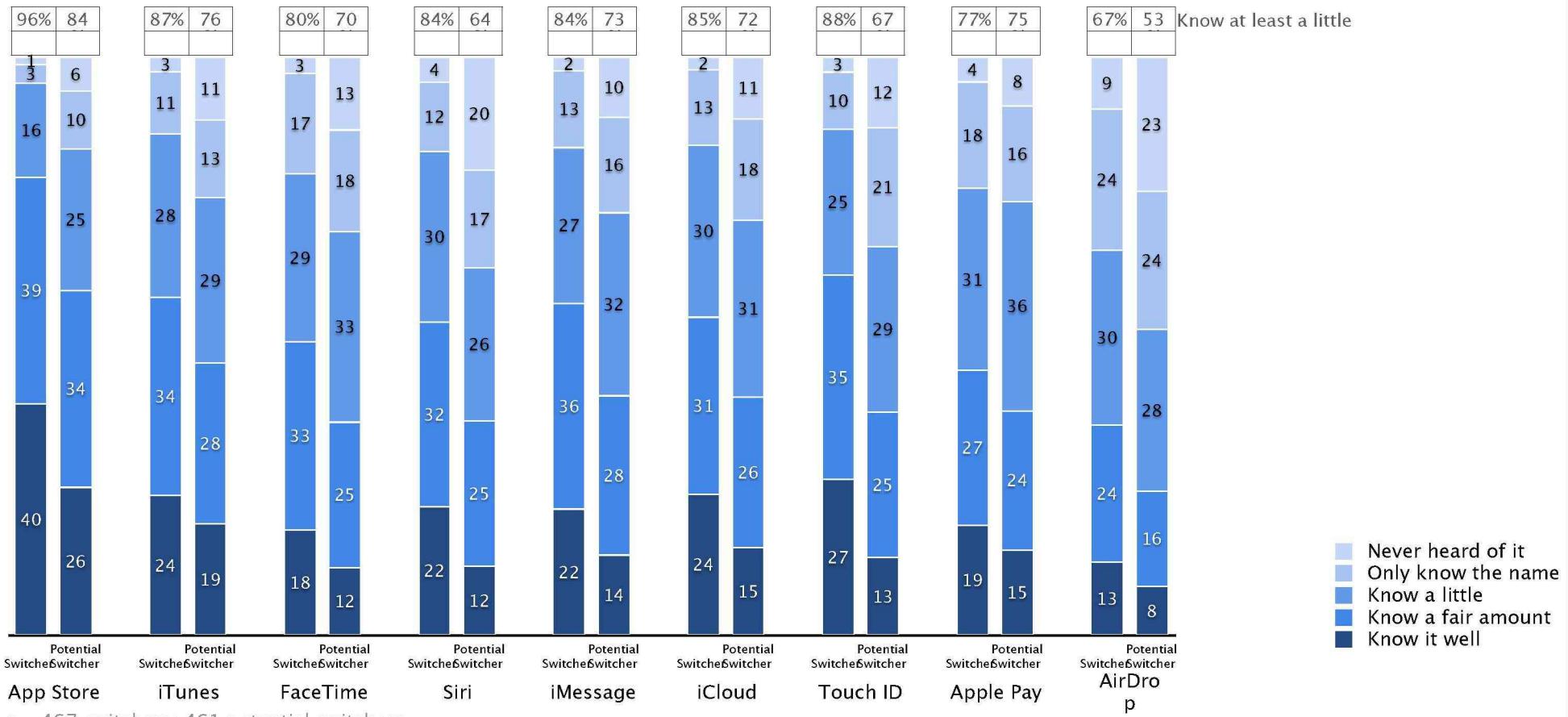
Apple feature familiarity (Japan)



Base: Japan iPhone owners (switchers); Android smartphone owners (potential switchers)
Q14: How familiar are you with the following?

APPLE
CONFIDENTIAL 34

Apple feature familiarity (China)



Base: China iPhone owners (switchers); Android smartphone owners (potential switchers)
Q14: How familiar are you with the following?

APPLE
CONFIDENTIAL 35

Apple feature familiarity (top-2 box)

Top-2 box (know it well/know a fair amount): Differences between Switchers and Potential Switchers

	US	UK	France	Germany	Japan	China
App Store	+	+	++	+		+
iTunes Store			+	+	+	+
FaceTime	++	+	++	+		+
Siri	++	++	++	++		+
iMessage	++	+++	+++	++		+
iCloud				+		+
Touch ID	++	++	+	+++		++
Apple Pay						
AirDrop	+	+				+

+ 10 pts. higher than other group +20 pts. higher than other group +30+ pts. higher than other group

Switcher Potential

Base: iPhone owners (switchers) and Android smartphone owners (potential switchers)
Q14: How familiar are you with the following?

APPLE
CONFIDENTIAL X

App Store, iMessage, and Touch ID (and others in China) are rated high in importance

Feature importance—top-2 box (among those who know feature well/know a fair amount/know a little)

	US		UK		France		Germany		Japan		China	
	Switchers	Potential Switchers										
App Store	78%	82%	74%	76%	65%	65%	64%	63%	44%	63%	83%	88%
iMessage	71%	71%	66%	63%	58%	59%	45%	47%	32%	43%	64%	72%
Touch ID	67%	70%	56%	56%	46%	63%	56%	50%	38%	40%	77%	74%
iTunes Store	66%	69%	60%	64%	42%	51%	54%	53%	33%	51%	70%	79%
FaceTime	64%	63%	54%	54%	47%	55%	39%	45%	17%	31%	62%	68%
Siri	60%	61%	42%	43%	53%	50%	40%	38%	24%	38%	59%	71%
iCloud	59%	71%	56%	62%	36%	56%	49%	47%	36%	53%	68%	78%
Apple Pay	51%	54%	39%	45%	—	—	—	—	—	—	—	—
AirDrop	49%	59%	37%	42%	29%	43%	37%	45%	18%	44%	62%	69%



*Base sizes vary by feature (Apple Pay not shown outside the US/UK)

Base: iPhone owners (switchers); Android smartphone owners (potential switchers) aware (know it well/know a fair amount/know a little) of feature

Q15: How important or unimportant were each of the following in your decision to acquire the [PHONE MODEL] smartphone? (Switchers)

Q15: How important or unimportant are each of the following in your consideration of an iPhone for your next smartphone purchase? (Potential Switchers)

CONFIDENTIAL 36

Apple feature importance in purchase/consideration

Top-2 box: Differences between Switchers and Potential Switchers

	US	UK	France	Germany	Japan	China
App Store					+	
iMessage					+	
Touch ID			+			
iTunes Store					+	
FaceTime					+	
Siri					+	+
iCloud	+		++		+	+
Apple Pay			--	--	--	--
AirDrop	+		+		++	

+ 10 pts. higher than other group +20 pts. higher than other group +30+ pts. higher than other group

Switcher Potential

*Base sizes vary by feature (Apple Pay not shown outside the US/UK)

Base: iPhone owners (switchers); Android smartphone owners (potential switchers) aware (know it well/know a fair amount/know a little) of feature

Q15: How important or unimportant were each of the following in your decision to acquire the [IPHONE MODEL] smartphone? (Switchers)

Q15: How important or unimportant are each of the following in your consideration of an iPhone for your next smartphone purchase? (Potential Switchers)

CONFIDENTIAL X

Usage

X

Smartphone usage (iPhone)

At least weekly usage on iPhone (among switchers)

	US	UK	France	Germany	Japan	China
Email (personal or work)	84%	77%	82%	81%	72%	40%
Web browsing (anything done within a web browser, as opposed to apps)	79%	76%	84%	85%	67%	69%
Viewing photos	75%	70%	75%	83%	51%	70%
Check/update social networking sites (e.g., Facebook, etc.)	75%	70%	68%	73%	40%	47%
Game apps	63%	58%	63%	49%	38%	48%
Front-facing camera (touchscreen side of smartphone)	61%	51%	47%	55%	23%	46%
Music (streaming or downloaded)	60%	53%	52%	58%	22%	56%
Instant messaging/chat (e.g., WhatsApp, iMessage, WeChat, etc.)	58%	67%	49%	74%	61%	74%
Back-facing camera (opposite side of touchscreen)	56%	54%	60%	65%	25%	53%
Watching video (films/movies, TV shows, video clips, etc.)	56%	42%	43%	42%	15%	64%
Non-game apps	53%	48%	53%	55%	37%	31%
Video calling (e.g. Skype, FaceTime, etc.)	40%	35%	28%	21%	5%	29%
Making payments by NFC	22%	15%	8%	3%	1%	31%
Working on documents, spreadsheets or presentations	12%	10%	8%	12%	4%	24%
None of the above	1%	2%	1%	0%	2%	0%
n=	481	470	186	286	451	467



Base: US iPhone owners (switchers)

Q11. Which of these, if any, are you currently using or doing on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL X

In Japan/China, higher percentages of potential switchers are doing various activities on their Androids, compared to switchers

At least weekly usage on smartphone: Differences between iPhone and Samsung/Sony* owners

	US	UK	France	Germany	Japan	China
Email (personal or work)					+	
Web browsing (anything done within a web browser, as opposed to apps)						
Viewing photos	+				+	+
Check/update social networking sites (e.g., Facebook, etc.)					++	
Game apps						
Front-facing camera (touchscreen side of smartphone)						
Music (streaming or downloaded)		+	+		+	+
Instant messaging/chat (e.g., WhatsApp, iMessage, WeChat, etc.)	+		+			
Back-facing camera (opposite side of touchscreen)					+	+
Watching video (films/movies, TV shows, video clips, etc.)					+	+
Non-game apps						
Video calling (e.g. Skype, FaceTime, etc.)	+	+				
Making payments by NFC					+++	
Working on documents, spreadsheets or presentations						
None of the above						

+ 10 pts. higher than other group +20 pts. higher than other group +30+ pts. higher than other group iPhone | Competitor

Ranked on US switchers

*Samsung, except in Japan where it is Sony

Base: US iPhone owners (switchers); Android smartphone owners (potential switchers) asked about current Samsung/Sony smartphone Q11. Which of these, if any, are you currently using or doing on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL X

Smartphone usage (US)

At least weekly usage on smartphone (among owners of each brand)

	iPhone	Samsung								
Email (personal or work)	84%	82%								
Web browsing (anything done within a web browser, as opposed to apps)	79%	81%								
Viewing photos	75%	78%								
Check/update social networking sites (e.g., Facebook, etc.)	75%	72%								
Game apps	63%	63%								
Front-facing camera (touchscreen side of smartphone)	61%	54%								
Music (streaming or downloaded)	60%	59%								
Instant messaging/chat (e.g., WhatsApp, iMessage, WeChat, etc.)	58%	42%								
Back-facing camera (opposite side of touchscreen)	56%	58%								
Watching video (films/movies, TV shows, video clips, etc.)	56%	64%								
Non-game apps	53%	49%								
Video calling (e.g. Skype, FaceTime, etc.)	40%	27%								
Making payments by NFC	22%	20%								
Working on documents, spreadsheets or presentations	12%	16%								
None of the above	1%	1%								
n=	481	283								
%	10	20	30	40	50	60	70	80	90	100

Base: US iPhone owners (switchers); Android smartphone owners (potential switchers) asked about current Samsung smartphone Q11. Which of these, if any, are you currently using or doing on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL X

Smartphone usage (UK)

At least weekly usage on smartphone (among owners of each brand)

	iPhone	Samsung	HTC	Sony						
Email (personal or work)	77%	72%	83%	78%						
Web browsing (anything done within a web browser, as opposed to apps)	76%	80%	81%	86%						
Check/update social networking sites (e.g., Facebook, etc.)	70%	65%	75%	80%						
Viewing photos	70%	81%	71%	80%						
Instant messaging/chat (e.g., WhatsApp, iMessage, WeChat, etc.)	67%	59%	60%	58%						
Game apps	58%	54%	56%	50%						
Back-facing camera (opposite side of touchscreen)	54%	62%	69%	62%						
Music (streaming or downloaded)	53%	43%	48%	42%						
Front-facing camera (touchscreen side of smartphone)	51%	48%	35%	38%						
Non-game apps	48%	50%	42%	46%						
Watching video (films/movies, TV shows, video clips, etc.)	42%	43%	37%	42%						
Video calling (e.g. Skype, FaceTime, etc.)	35%	22%	8%	16%						
Making payments by NFC	15%	21%	4%	8%						
Working on documents, spreadsheets or presentations	10%	18%	15%	8%						
None of the above	2%	3%	0%	0%						
n=	470	310	52	50						
%	10	20	30	40	50	60	70	80	90	100

Base: UK iPhone owners (switchers); Android smartphone owners (potential switchers) asked about current Samsung/HTC/Sony smartphone
Q11. Which of these, if any, are you currently using or doing on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL

X

Smartphone usage (France)

At least weekly usage on smartphone (among owners of each brand)

	iPhone	Samsung								
Web browsing (anything done within a web browser, as opposed to apps)	84%	83%								
Email (personal or work)	82%	85%								
Viewing photos	75%	81%								
Check/update social networking sites (e.g., Facebook, etc.)	68%	63%								
Game apps	63%	55%								
Back-facing camera (opposite side of touchscreen)	60%	67%								
Non-game apps	53%	59%								
Music (streaming or downloaded)	52%	39%								
Instant messaging/chat (e.g., WhatsApp, iMessage, WeChat, etc.)	49%	37%								
Front-facing camera (touchscreen side of smartphone)	47%	48%								
Watching video (films/movies, TV shows, video clips, etc.)	43%	34%								
Video calling (e.g. Skype, FaceTime, etc.)	28%	19%								
Working on documents, spreadsheets or presentations	8%	12%								
Making payments by NFC	8%	5%								
None of the above	1%	0%								
n=	186	190								
%	10	20	30	40	50	60	70	80	90	100

Base: France iPhone owners (switchers); Android smartphone owners (potential switchers) asked about current Samsung smartphone Q11. Which of these, if any, are you currently using or doing on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL X

Smartphone usage (Germany)

At least weekly usage on smartphone (among owners of each brand)

	iPhone	Samsung								
Web browsing (anything done within a web browser, as opposed to apps)	85%	83%								
Viewing photos	83%	81%								
Email (personal or work)	81%	74%								
Instant messaging/chat (e.g., WhatsApp, iMessage, WeChat, etc.)	74%	69%								
Check/update social networking sites (e.g., Facebook, etc.)	73%	68%								
Back-facing camera (opposite side of touchscreen)	65%	58%								
Music (streaming or downloaded)	58%	50%								
Non-game apps	55%	51%								
Front-facing camera (touchscreen side of smartphone)	55%	52%								
Game apps	49%	49%								
Watching video (films/movies, TV shows, video clips, etc.)	42%	48%								
Video calling (e.g. Skype, FaceTime, etc.)	21%	13%								
Working on documents, spreadsheets or presentations	12%	13%								
Making payments by NFC	3%	4%								
None of the above	0%	1%								
n=	286	232								
%	10	20	30	40	50	60	70	80	90	100

Base: Germany iPhone owners (switchers); Android smartphone owners (potential switchers) asked about current Samsung smartphone
Q11. Which of these, if any, are you currently using or doing on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL X

Smartphone usage (Japan)

At least weekly usage on smartphone (among owners of each brand)

	iPhone	Sony	Sharp							
Email (personal or work)	72%	86%	84%							
Web browsing (anything done within a web browser, as opposed to apps)	67%	69%	64%							
Instant messaging/chat (e.g., WhatsApp, iMessage, WeChat, etc.)	61%	53%	42%							
Viewing photos	51%	65%	51%							
Check/update social networking sites (e.g., Facebook, etc.)	40%	60%	42%							
Game apps	38%	42%	45%							
Non-game apps	37%	45%	38%							
Back-facing camera (opposite side of touchscreen)	25%	37%	27%							
Front-facing camera (touchscreen side of smartphone)	23%	28%	16%							
Music (streaming or downloaded)	22%	32%	15%							
Watching video (films/movies, TV shows, video clips, etc.)	15%	26%	24%							
Video calling (e.g. Skype, FaceTime, etc.)	5%	5%	9%							
Working on documents, spreadsheets or presentations	4%	12%	9%							
Making payments by NFC	1%	33%	16%							
None of the above	2%	0%	0%							
n=	451	78	55							
%	10	20	30	40	50	60	70	80	90	100

Base: Japan iPhone owners (switchers); Android smartphone owners (potential switchers) asked about current Sony/Sharp smartphone Q11. Which of these, if any, are you currently using or doing on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL X

Smartphone usage (China)

At least weekly usage on smartphone (among owners of each brand)

	iPhone	Samsung	Xiaomi	Huawei						
Instant messaging/chat (e.g., WhatsApp, iMessage, WeChat, etc.)	74%	83%	87%	83%						
Viewing photos	70%	81%	75%	67%						
Web browsing (anything done within a web browser, as opposed to apps)	69%	78%	82%	73%						
Watching video (films/movies, TV shows, video clips, etc.)	64%	77%	75%	61%						
Music (streaming or downloaded)	56%	68%	61%	60%						
Back-facing camera (opposite side of touchscreen)	53%	63%	65%	64%						
Game apps	48%	57%	52%	43%						
Check/update social networking sites (e.g., Facebook, etc.)	47%	54%	45%	57%						
Front-facing camera (touchscreen side of smartphone)	46%	48%	44%	45%						
Email (personal or work)	40%	45%	44%	43%						
Non-game apps	31%	30%	27%	35%						
Making payments by NFC	31%	34%	25%	27%						
Video calling (e.g. Skype, FaceTime, etc.)	29%	36%	18%	27%						
Working on documents, spreadsheets or presentations	24%	30%	25%	32%						
None of the above	0%	0%	0%	0%						
n=	467	183	77	75						
%	10	20	30	40	50	60	70	80	90	100

Base: China iPhone owners (switchers); Android smartphone owners (potential switchers) asked about current Samsung/Xiaomi/Huawei smartphone Q11. Which of these, if any, are you currently using or doing on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL

X

App Store, Touch ID, and iMessage have the highest usage levels of the iPhone features shown to switchers

At least weekly usage (among switchers)

	US	UK	France	Germany	Japan	China
App Store	61%	54%	61%	55%	23%	66%
iMessage	58%	52%	54%	28%	8%	28%
Siri	46%	31%	34%	36%	11%	28%
FaceTime	40%	31%	24%	16%	3%	15%
Touch ID*	39%	46%	40%	59%	21%	42%
iTunes Store	37%	32%	26%	32%	10%	24%
iCloud	27%	25%	21%	26%	16%	31%
Apple Pay*	12%	7%	—	—	—	—
AirDrop	6%	8%	5%	3%	2%	12%
n=	481	470	186	286	451	467



For those who "only know the name" or who have "never heard of it," non-usage is assumed (i.e. feature not seen)

*Touch ID base is those with an iPhone 5s/iPhone 6/iPhone 6 Plus; Apple Pay base is those with an iPhone 5 or newer (Apple Pay not shown outside the US/UK)

Base: iPhone owners (switchers)

Q16: Which of these, if any, do you use on your iPhone smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL X

Competitive feature usage (at least weekly) on current smartphone

	US		UK		France		Germany		Japan		China	
	Switchers	Potential Switchers										
YouTube	70%	73%	62%	65%	61%	59%	64%	62%	35%	53%	—	—
Gmail/Google Mail	61%	71%	40%	60%	48%	72%	28%	40%	24%	40%	8%	6%
Google Maps	44%	53%	31%	47%	34%	53%	30%	48%	27%	34%	25%	29%
Google+	21%	30%	12%	21%	27%	33%	14%	21%	10%	21%	7%	10%
WhatsApp	16%	14%	50%	52%	24%	20%	92%	88%	1%	1%	8%	5%
Google Play	12%	43%	6%	32%	8%	32%	6%	31%	3%	33%	5%	5%
Google Drive	11%	15%	6%	11%	3%	16%	3%	7%	2%	5%	5%	7%
Hangouts	7%	11%	4%	7%	3%	8%	1%	6%	0%	0%	3%	2%
Google Now	4%	6%	3%	5%	3%	6%	2%	6%	1%	4%	7%	5%
Google Cast	2%	2%	2%	3%	1%	1%	0%	1%	1%	1%	4%	3%
WeChat	—	—	—	—	—	—	—	—	—	—	87%	89%
Alipay Wallet	—	—	—	—	—	—	—	—	—	—	78%	83%
QQ Instant Messaging	—	—	—	—	—	—	—	—	—	—	73%	80%
WeChat Payment	—	—	—	—	—	—	—	—	—	—	49%	48%
Youku	—	—	—	—	—	—	—	—	—	—	29%	33%
None of these	11%	7%	13%	8%	10%	8%	2%	3%	38%	23%	0%	1%
n=	481	483	470	470	186	276	286	339	451	261	467	461
	%	10	20	30	40	50	60	70	80	90	100	

Base: iPhone owners (switchers); Android smartphone owners (potential switchers) asked about current smartphone
Q13. Which of these, if any, do you use on your [BRAND] smartphone at least once a week? (select all that apply)

APPLE
CONFIDENTIAL X

Satisfaction with features

Switchers generally report higher satisfaction with their iPhone than potential switchers report with their current smartphone

Top-2 box satisfaction

	us	UK	France	Germany	Japan	China				
	Switchers	Potential Switchers								
Speed of the smartphone	93%	67%	89%	70%	91%	62%	91%	60%	79%	38%
Operating system	91%	86%	86%	85%	91%	85%	89%	76%	67%	51%
Screen quality	91%	80%	89%	85%	89%	80%	95%	77%	80%	61%
Ease of holding and operating in my hands	90%	86%	87%	84%	94%	89%	91%	83%	71%	64%
Physical appearance and design	90%	78%	90%	83%	90%	78%	95%	77%	81%	62%
Screen size	89%	76%	87%	84%	88%	81%	86%	77%	79%	69%
Picture quality from the camera	89%	70%	87%	77%	87%	71%	90%	60%	75%	54%
Reliability (e.g., crashes and freezes less)	88%	65%	82%	66%	80%	57%	84%	52%	69%	38%
Selection of content available	87%	77%	84%	75%	72%	63%	79%	67%	53%	45%
Durability	85%	81%	76%	79%	72%	68%	73%	68%	45%	50%
Security	83%	68%	75%	71%	75%	62%	71%	55%	55%	43%
Privacy of my personal information	79%	69%	69%	68%	71%	52%	66%	48%	51%	43%
Value for price paid	77%	78%	70%	80%	57%	82%	33%	45%	61%	43%
Ease of online backup (keeping data safe from loss)	77%	59%	67%	55%	67%	50%	65%	43%	44%	37%
Storage space	76%	63%	70%	63%	73%	57%	70%	49%	64%	51%
Battery life	74%	54%	60%	54%	47%	55%	64%	39%	66%	30%
Ease of sharing files across other devices	73%	64%	64%	63%	65%	64%	57%	65%	39%	36%
Ease of synchronization across my devices	72%	57%	67%	60%	67%	62%	59%	56%	40%	39%
n=	481	483	470	470	186	276	286	339	451	261
					%	10	20	30	40	50
						60	70	80	90	100

Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL 38

Satisfaction with current smartphone features (top box)

	US Switchers	Potential Switchers	UK Switchers	Potential Switchers	France Switchers	Potential Switchers	Germany Switchers	Potential Switchers	Japan Switchers	Potential Switchers	China Switchers	Potential Switchers
Screen quality	67%	39%	56%	40%	59%	33%	64%	33%	29%	15%	38%	27%
Physical appearance and design	65%	37%	57%	38%	55%	30%	69%	31%	29%	18%	34%	25%
Operating system	65%	42%	52%	40%	58%	36%	60%	34%	22%	10%	38%	20%
Speed of the smartphone	64%	28%	54%	27%	59%	15%	56%	17%	25%	7%	40%	18%
Picture quality from the camera	63%	30%	54%	34%	51%	30%	57%	24%	30%	16%	39%	22%
Ease of holding and operating in my hands	62%	44%	52%	43%	59%	37%	57%	37%	20%	14%	30%	20%
Screen size	59%	42%	49%	41%	43%	37%	52%	37%	31%	18%	27%	25%
Reliability (e.g., crashes and freezes less)	58%	27%	50%	29%	45%	20%	57%	23%	22%	7%	41%	18%
Durability	56%	43%	39%	35%	31%	25%	39%	25%	9%	10%	36%	19%
Selection of content available	54%	30%	48%	26%	38%	14%	45%	28%	16%	6%	24%	16%
Security	53%	25%	39%	26%	33%	17%	37%	16%	15%	8%	36%	19%
Privacy of my personal information	50%	27%	33%	24%	33%	16%	30%	13%	13%	7%	26%	20%
Battery life	47%	18%	23%	18%	17%	16%	31%	12%	22%	8%	20%	13%
Ease of sharing files across other devices	44%	27%	31%	24%	33%	21%	27%	24%	9%	8%	24%	21%
Ease of online backup (keeping data safe from loss)	44%	26%	36%	19%	35%	16%	33%	15%	10%	5%	23%	17%
Ease of synchronization across my devices	44%	22%	36%	25%	33%	26%	33%	21%	11%	6%	22%	17%
Value for price paid	42%	36%	28%	37%	21%	33%	12%	14%	16%	10%	21%	25%
Storage space	40%	25%	38%	24%	34%	16%	38%	19%	20%	12%	27%	13%
n=	481	483	470	470	186	276	286	339	451	261	467	461

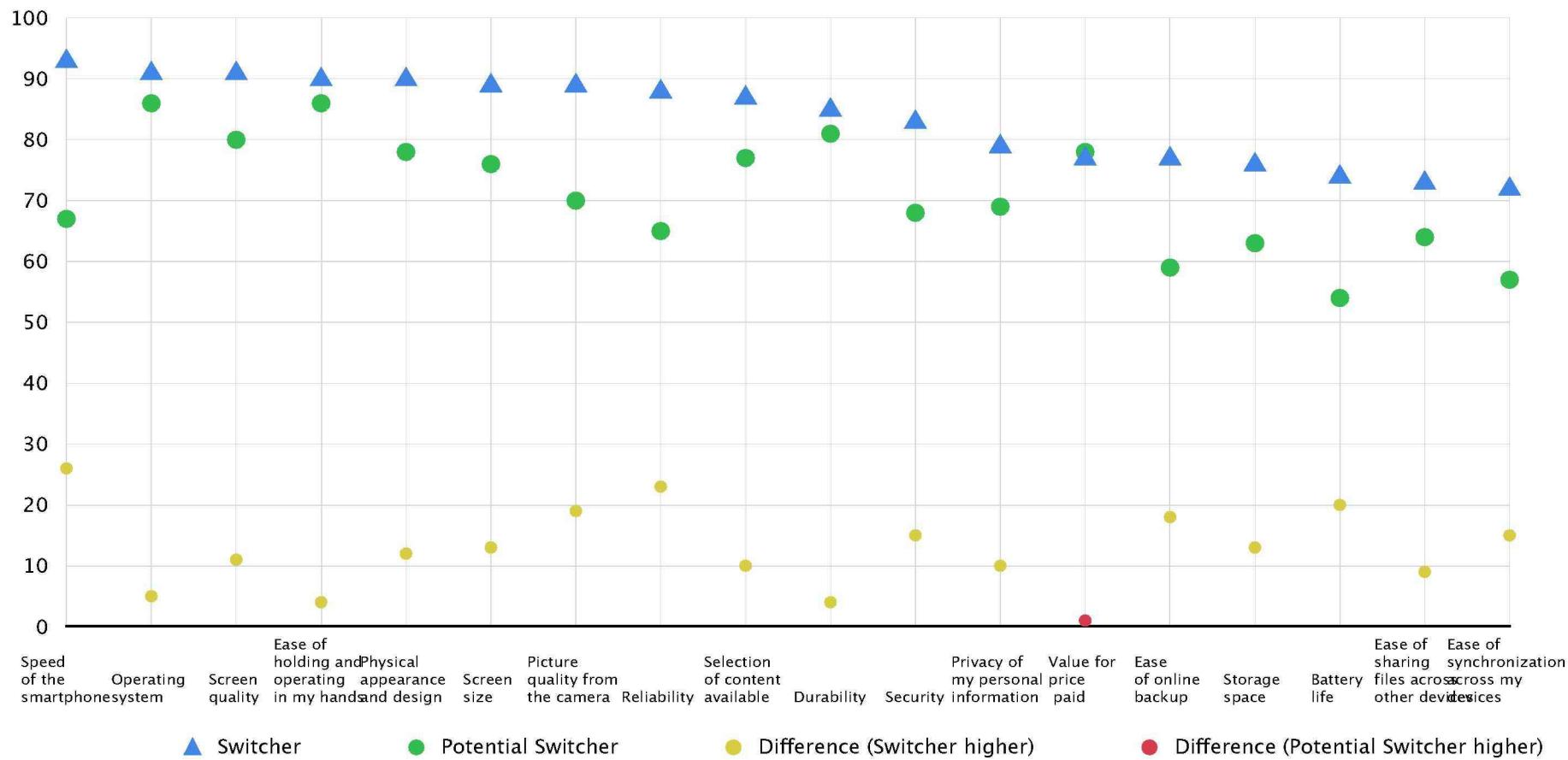


Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)-US



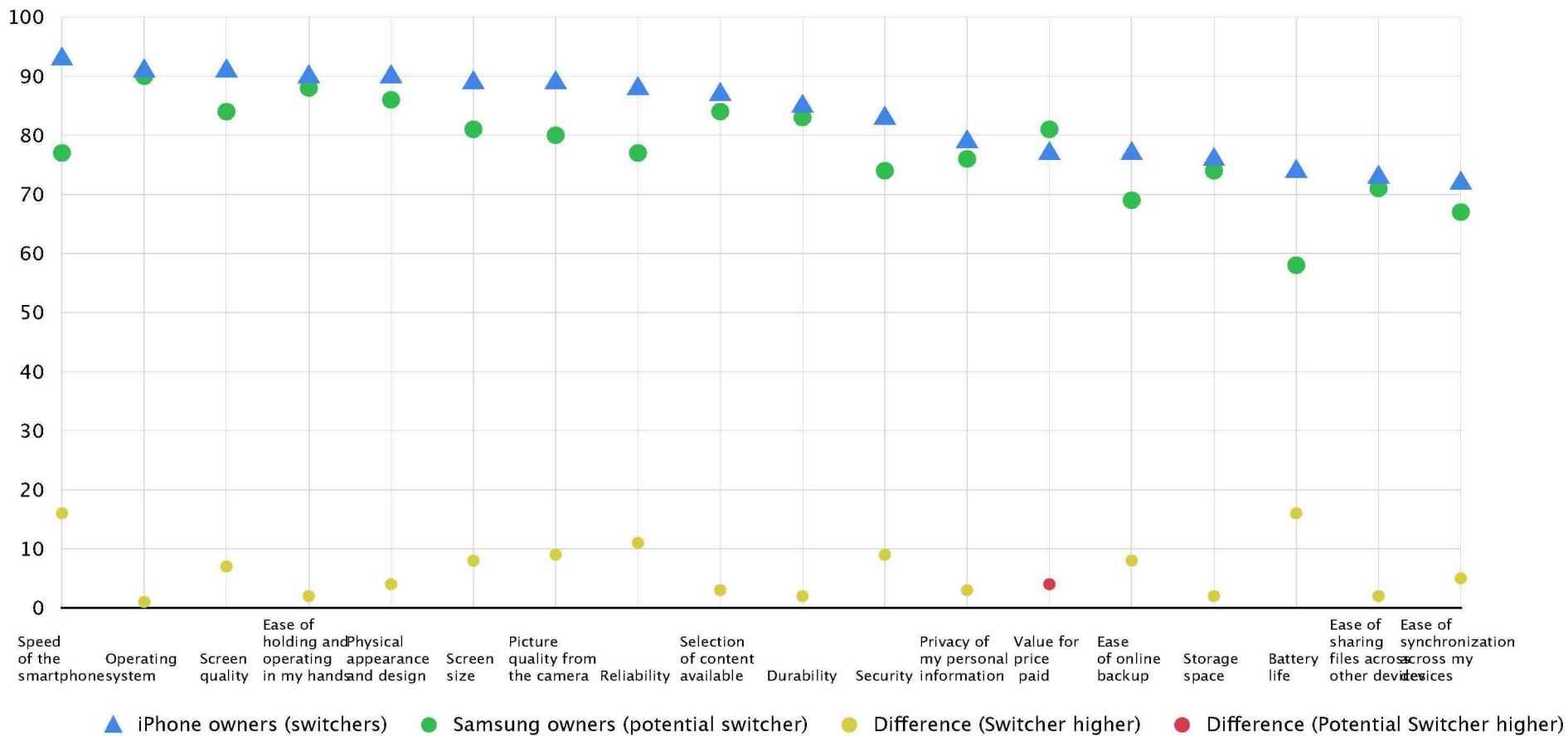
n= 481 switchers; 483 potential switchers

Base: US iPhone owners (switchers); Android smartphone owners (potential switchers)

Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)-US (iPhone vs. Samsung owners)

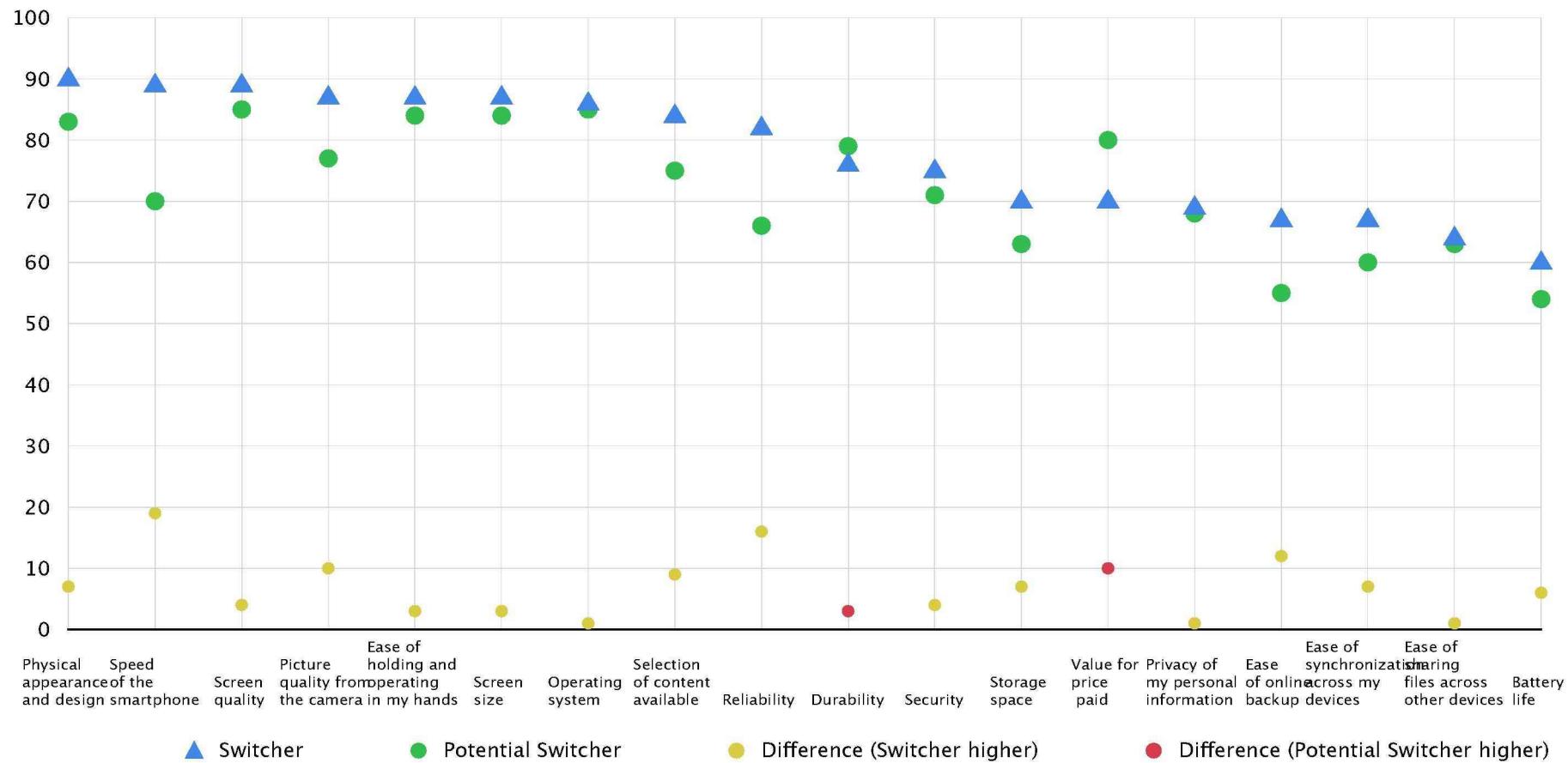


n= 481 switchers; 283 potential switchers

Base: US iPhone owners (switchers); Samsung Android smartphone owners (potential switchers)
Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)-UK

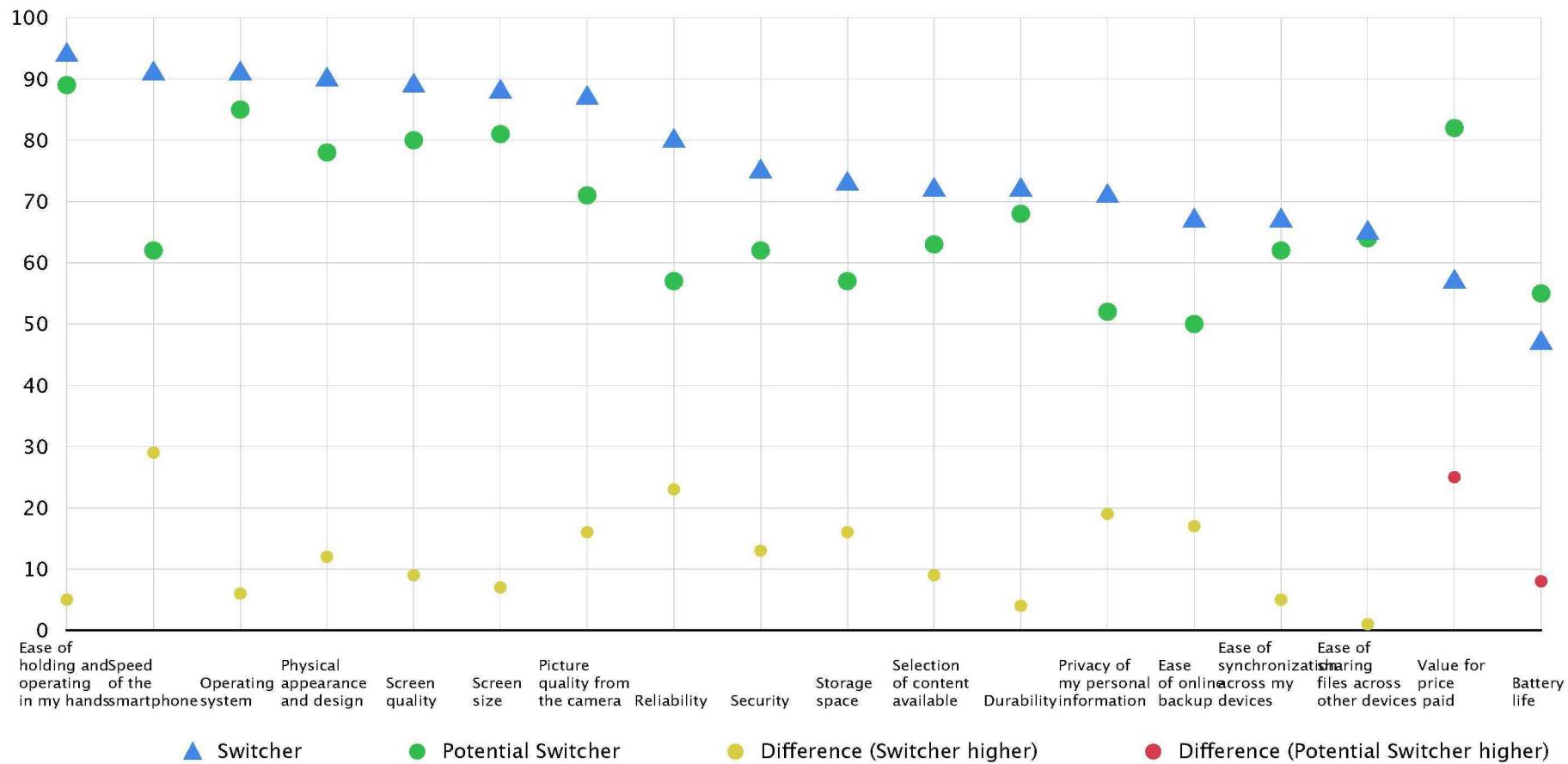


n= 470 switchers; 470 potential switchers

Base: UK iPhone owners (switchers); Android smartphone owners (potential switchers)
Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)-France

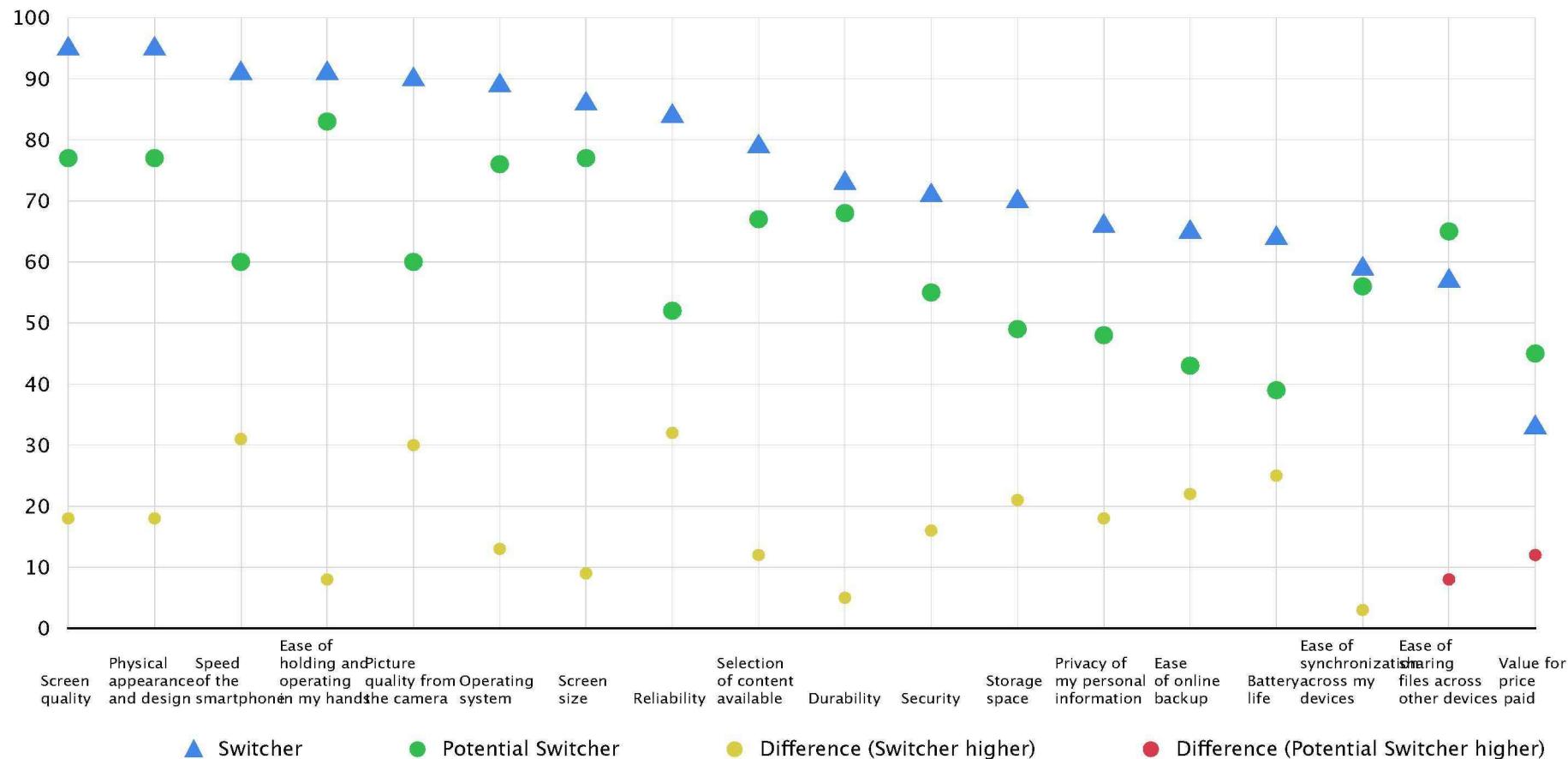


n= 186 switchers; 276 potential switchers

Base: France iPhone owners (switchers); Android smartphone owners (potential switchers)
Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)-Germany

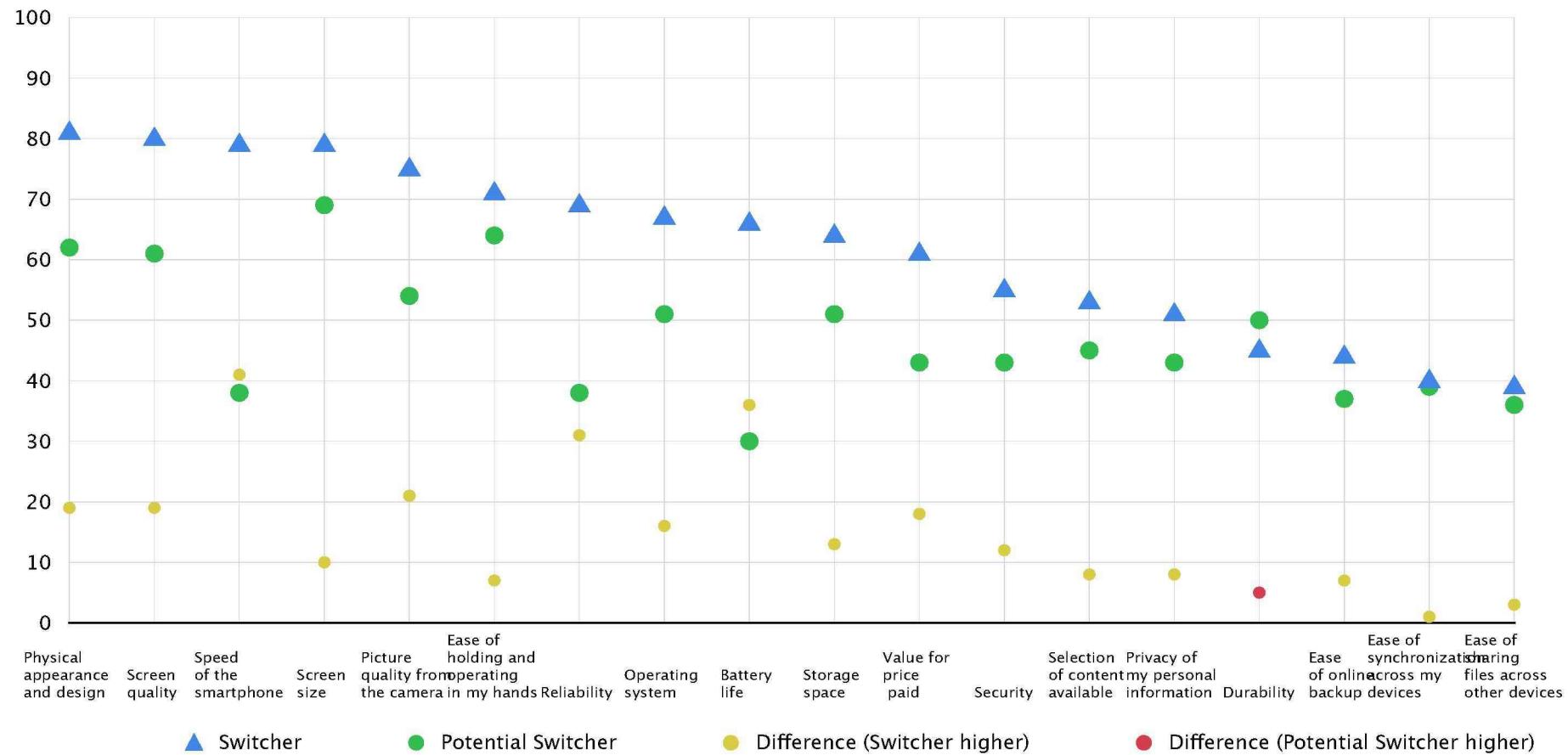


n= 286 switchers; 339 potential switchers

Base: Germany iPhone owners (switchers); Android smartphone owners (potential switchers)
Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)-Japan

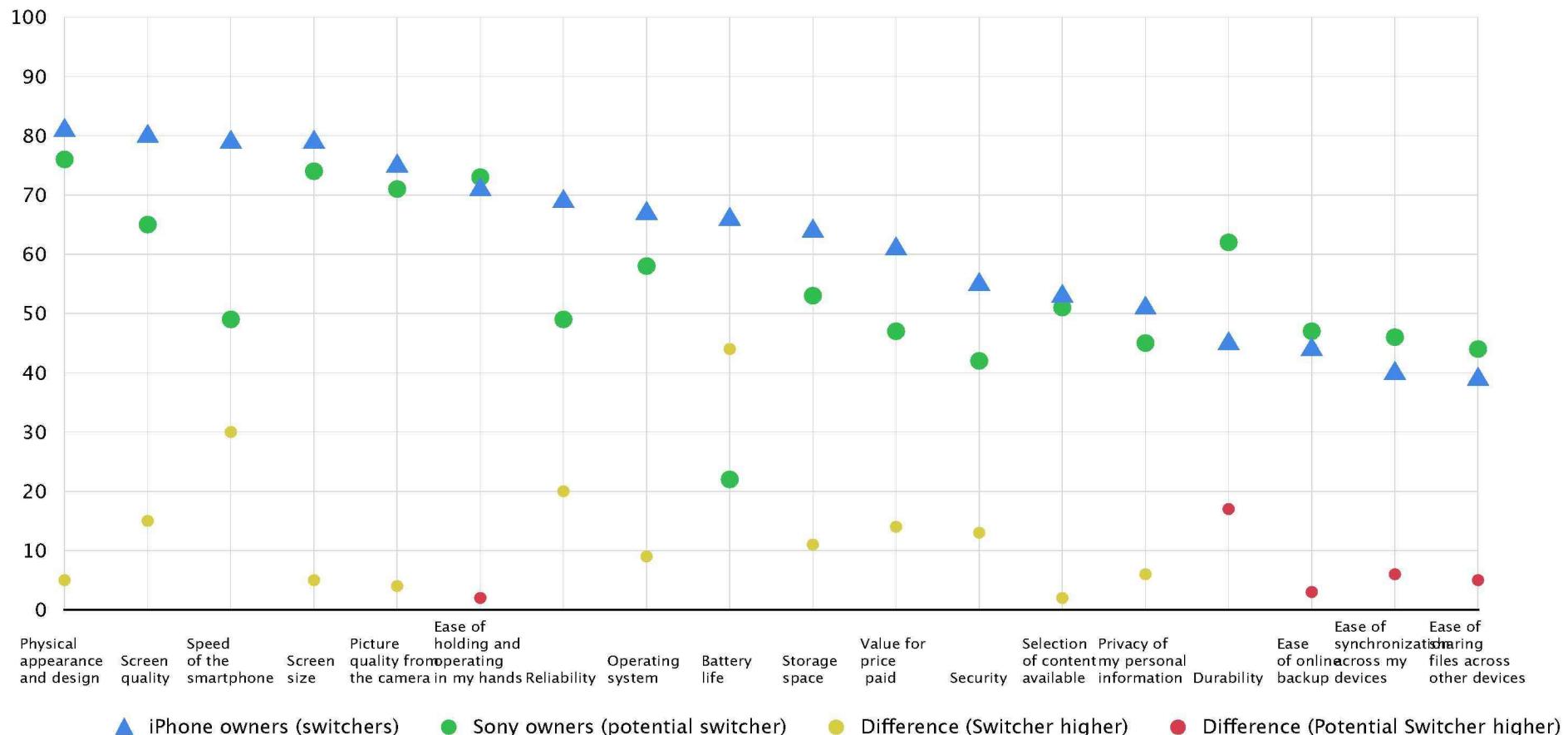


n= 451 switchers; 261 potential switchers

Base: Japan iPhone owners (switchers); Android smartphone owners (potential switchers)
Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)-Japan (iPhone vs. Sony owners)



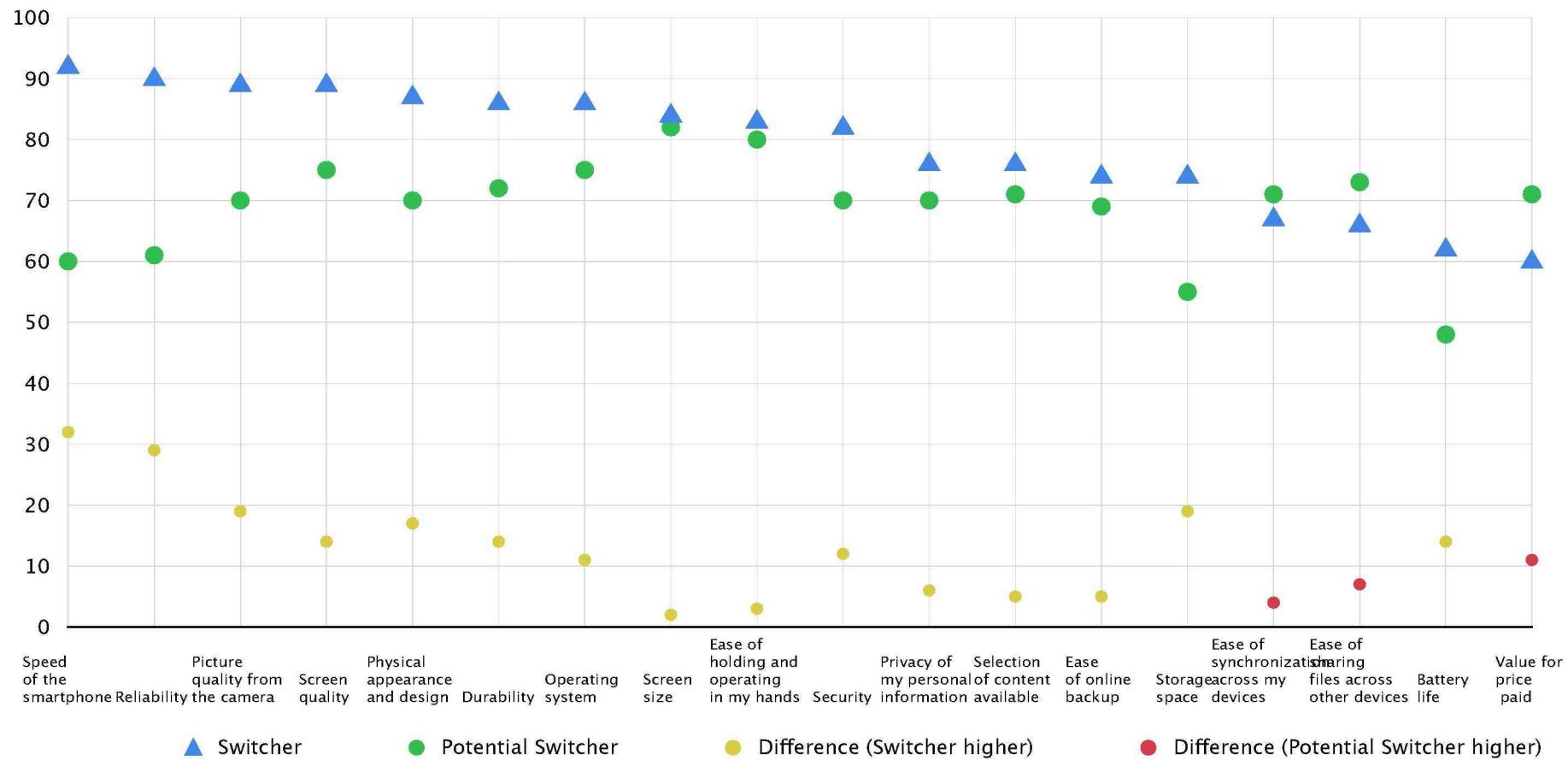
n= 451 switchers; 78 potential switchers

Base: Japan iPhone owners (switchers); Sony Android smartphone owners (potential switchers)

Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)-China

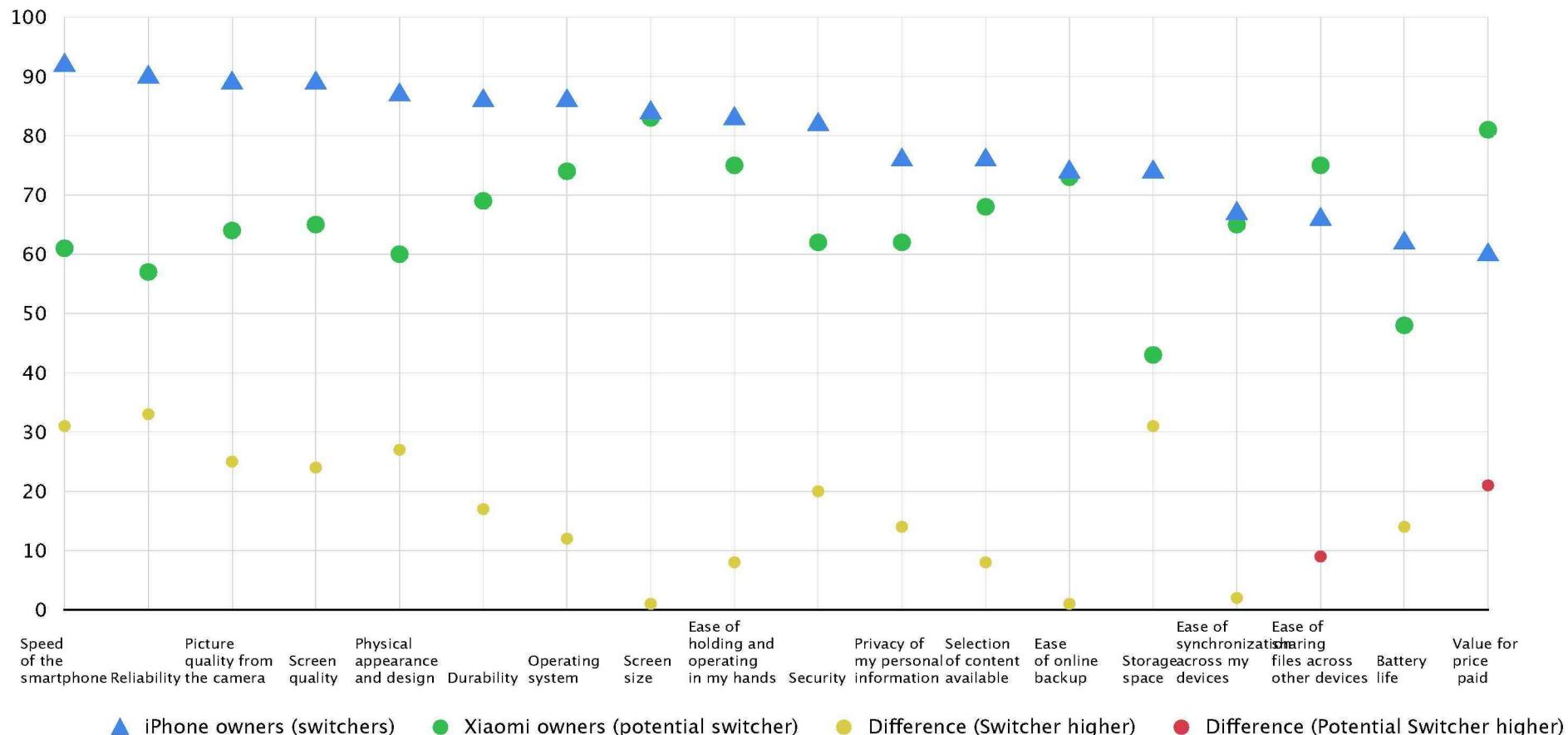


n= 467 switchers; 461 potential switchers

Base: China iPhone owners (switchers); Android smartphone owners (potential switchers)
Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)- China (iPhone vs. Xiaomi owners)

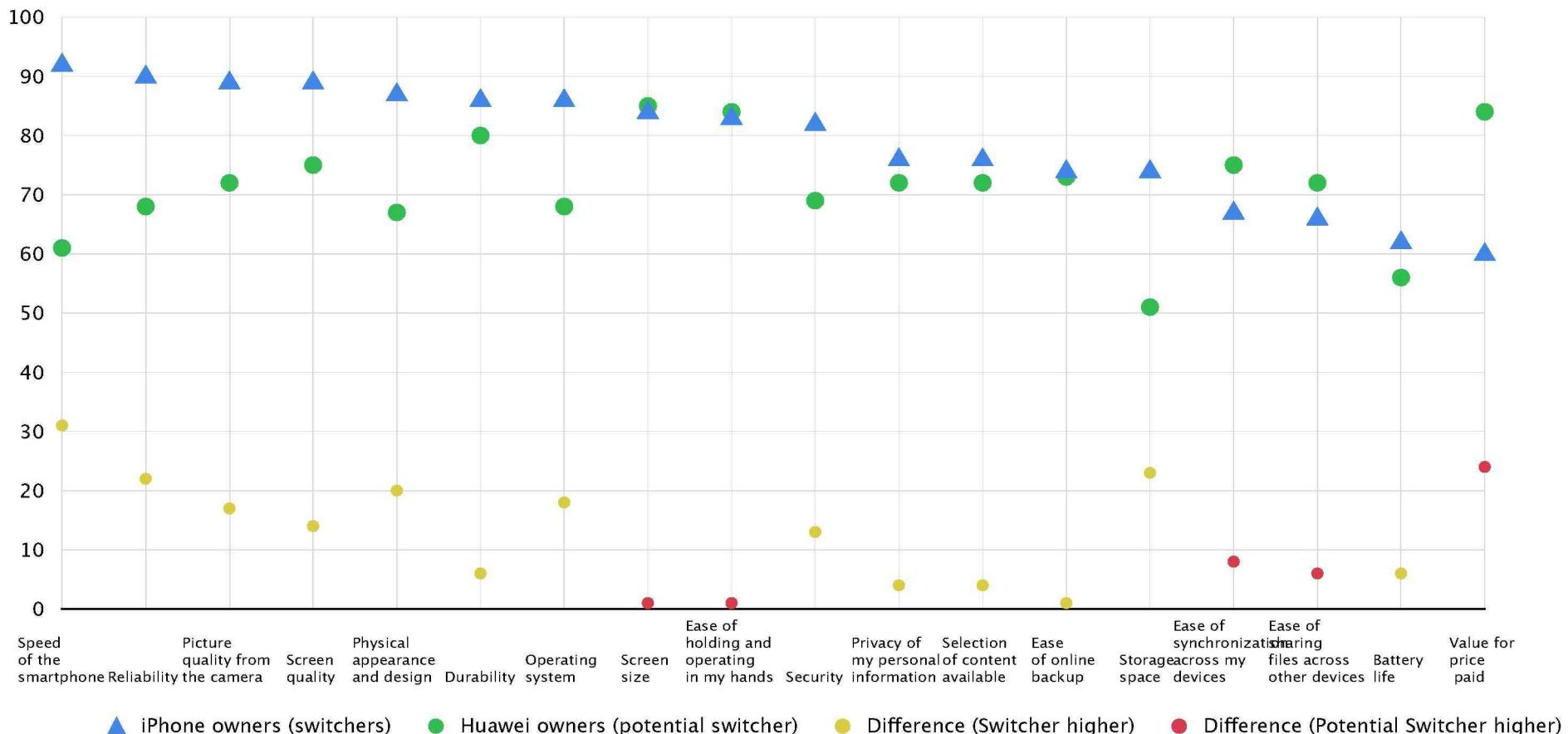


n= 467 switchers; 77 potential switchers

Base: China iPhone owners (switchers); Xiaomi Android smartphone owners (potential switchers)
Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Satisfaction with smartphone features (top-2 box)- China (iPhone vs. Huawei owners)



n= 467 switchers; 75 potential switchers

Base: China iPhone owners (switchers); Huawei Android smartphone owners (potential switchers)
Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

Switchers vs. Potential Switchers: smartphone feature satisfaction

Smartphone feature satisfaction (top-2 box) differences

	US	UK	France	Germany	Japan	China
Speed of the smartphone	++	+	++	+++	+++	+++
Operating system (e.g., Android, iPhone iOS)				+	+	+
Screen quality	+			+	+	+
Ease of holding and operating in my hands						
Physical appearance and design	+		+	+	+	+
Screen size	+				+	
Picture quality from the camera	+	+	+	+++	++	+
Reliability (e.g., crashes and freezes less)	++	+	++	+++	+++	++
Selection of content (e.g. apps, music, video) available	+			+		
Durability						+
Security	+		+	+	+	+
Privacy of my personal information	+		+	+		
Value for price paid		+	++	+	+	+
Ease of online backup (keeping data safe from loss)	+	+	+	++		
Storage space	+		+	++	+	+
Battery life	++			++	+++	+
Ease of sharing files (e.g. photos, documents, music, video) across other devices						
Ease of synchronization across my devices	+					

+ 10 pts. higher than other group
++ 20 pts. higher than other group
+++ 30+ pts. higher than other group

Switcher | Potential

Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL X

There are several attributes where dissatisfaction with current smartphone among potential switchers is high

	US Switchers	Potential Switchers	UK Switchers	Potential Switchers	France Switchers	Potential Switchers	Germany Switchers	Potential Switchers	Japan Switchers	Potential Switchers	China Switchers	Potential Switchers
Battery life	14%	30%	24%	29%	29%	30%	20%	38%	11%	54%	17%	34%
Storage space	12%	22%	17%	19%	11%	28%	16%	33%	6%	22%	9%	29%
Value for price paid	9%	8%	7%	6%	18%	4%	8%	4%	8%	20%	15%	9%
Ease of synchronization across my devices	5%	10%	5%	8%	10%	9%	10%	12%	7%	12%	9%	5%
Durability	5%	8%	8%	5%	8%	16%	3%	15%	10%	18%	2%	13%
Selection of content available	5%	7%	3%	5%	3%	5%	4%	5%	4%	11%	3%	6%
Reliability (e.g., crashes and freezes less)	4%	22%	4%	19%	5%	22%	3%	25%	5%	36%	1%	23%
Picture quality from the camera	4%	17%	3%	10%	3%	17%	3%	20%	3%	21%	3%	17%
Security	4%	5%	2%	3%	4%	6%	5%	6%	1%	9%	4%	5%
Ease of sharing files across other devices	3%	10%	6%	6%	7%	5%	17%	11%	7%	11%	9%	4%
Screen size	3%	9%	3%	6%	4%	8%	3%	9%	4%	11%	2%	4%
Screen quality	3%	7%	2%	4%	4%	9%	1%	6%	2%	10%	2%	8%
Ease of holding and operating in my hands	3%	5%	3%	3%	1%	3%	2%	6%	8%	14%	2%	4%
Speed of the smartphone	2%	19%	2%	14%	3%	20%	2%	23%	4%	35%	1%	27%
Ease of online backup	2%	8%	3%	5%	4%	9%	5%	11%	5%	13%	3%	6%
Operating system	2%	5%	3%	4%	2%	4%	1%	9%	4%	14%	1%	5%
Privacy of my personal information	2%	5%	3%	3%	9%	5%	6%	6%	2%	9%	4%	6%
Physical appearance and design	2%	5%	1%	3%	1%	4%	0%	5%	2%	8%	1%	5%
n=	481	483	470	470	186	276	286	339	451	261	467	461



Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q12. How satisfied or dissatisfied are you with each of these features or capabilities of your smartphone?

APPLE
CONFIDENTIAL 39

iPhone feature satisfaction (top-2 box)

iPhone feature satisfaction (top-2 box, among switchers who use feature)

	US	UK	France	Germany	Japan	China
FaceTime	97%	95%	95%	94%	92%	89%
iMessage	96%	96%	97%	94%	78%	93%
Touch ID*	96%	95%	100%	93%	83%	92%
App Store	95%	95%	96%	97%	77%	92%
iCloud	95%	91%	92%	89%	77%	91%
iTunes Store	94%	95%	94%	97%	81%	89%
Apple Pay*	93%	97%	—	—	—	—
Siri	92%	92%	95%	92%	75%	88%
AirDrop	89%	83%	80%	89%	100%	91%



*Touch ID base is those with an iPhone 5s/iPhone 6/iPhone 6 Plus; Apple Pay base is those with an iPhone 5 or newer (Apple Pay not shown outside the US/UK)

Base: iPhone owners (switchers) who use the feature (base sizes vary by feature)

Q17: How satisfied or dissatisfied are you with using each of the following on your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

iPhone feature satisfaction (top box)

iPhone feature satisfaction (top box, among switchers who use feature)

	US	UK	France	Germany	Japan	China
iMessage	79%	68%	72%	59%	33%	38%
Touch ID*	77%	71%	59%	69%	41%	46%
FaceTime	74%	64%	70%	64%	38%	39%
App Store	74%	59%	61%	67%	28%	42%
iTunes Store	70%	60%	51%	64%	30%	39%
Apple Pay*	68%	72%	—	—	—	—
Siri	68%	56%	59%	55%	25%	48%
iCloud	66%	59%	41%	54%	24%	44%
AirDrop	56%	53%	50%	44%	43%	41%



*Touch ID base is those with an iPhone 5s/iPhone 6/iPhone 6 Plus; Apple Pay base is those with an iPhone 5 or newer (Apple Pay not shown outside the US/UK)

Base: iPhone owners (switchers) who use the feature (base sizes vary by feature)

Q17: How satisfied or dissatisfied are you with using each of the following on your [IPHONE MODEL] smartphone?

APPLE
CONFIDENTIAL X

Appendix

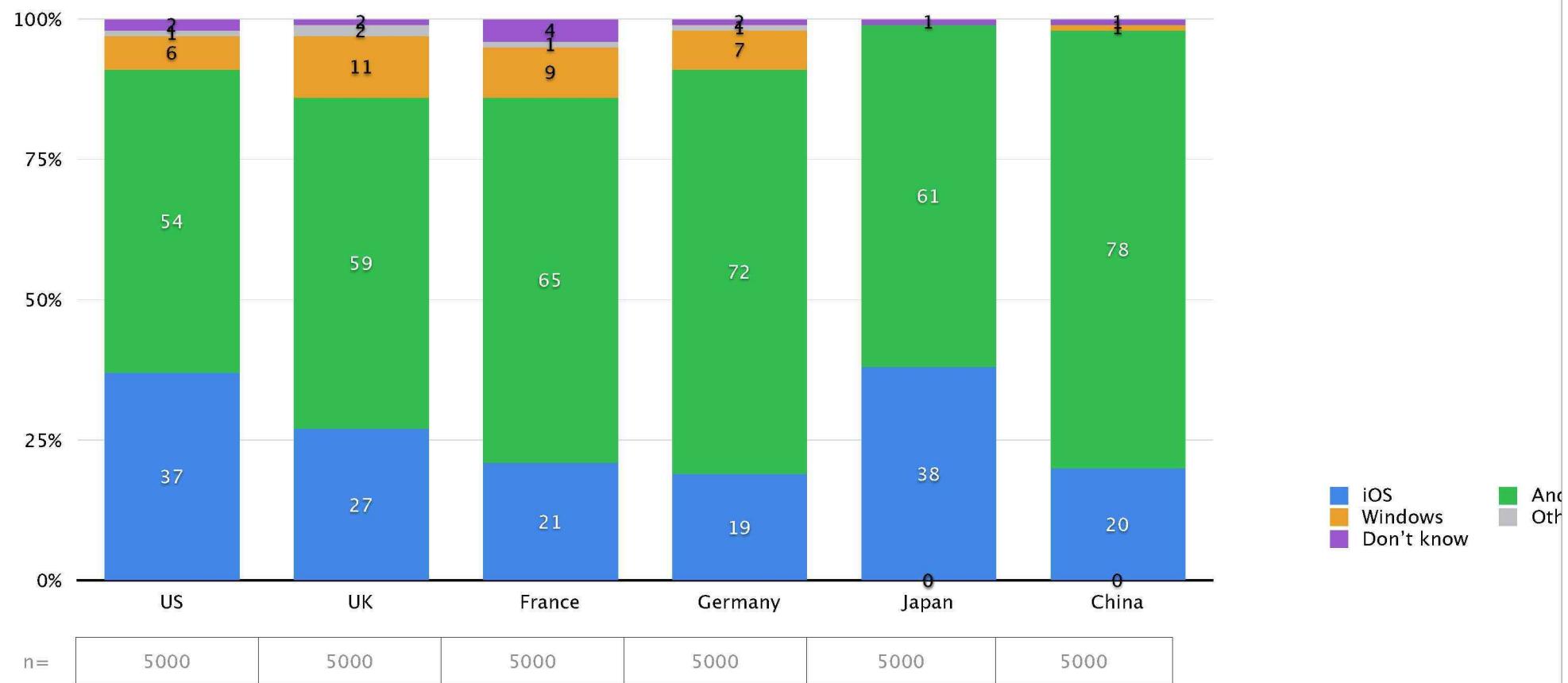
X

Market Statistics

X

OS of most recently acquired smartphone closely resembles installed base data we have from other studies

OS of most recently acquired smartphone

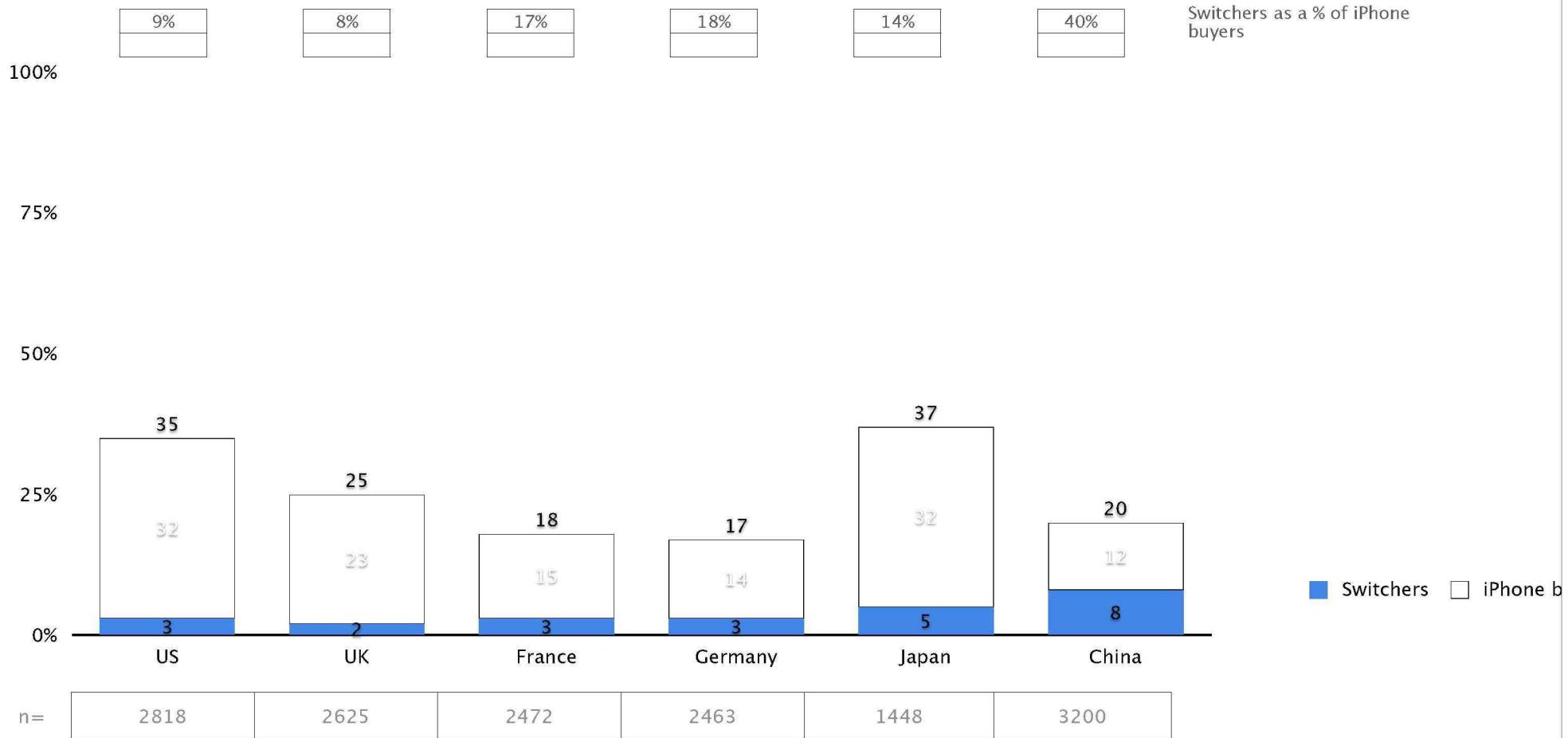


Base: Total smartphone owners (includes those not meeting all screening criteria)—general population age/gender representative
S9. What is the operating system of your [BRAND] smartphone?

APPLE
CONFIDENTIAL X

Switching accounts for a higher percentage of past 9 month iPhone purchase in China

Switchers (as a percentage of past 9 month smartphone buyers)

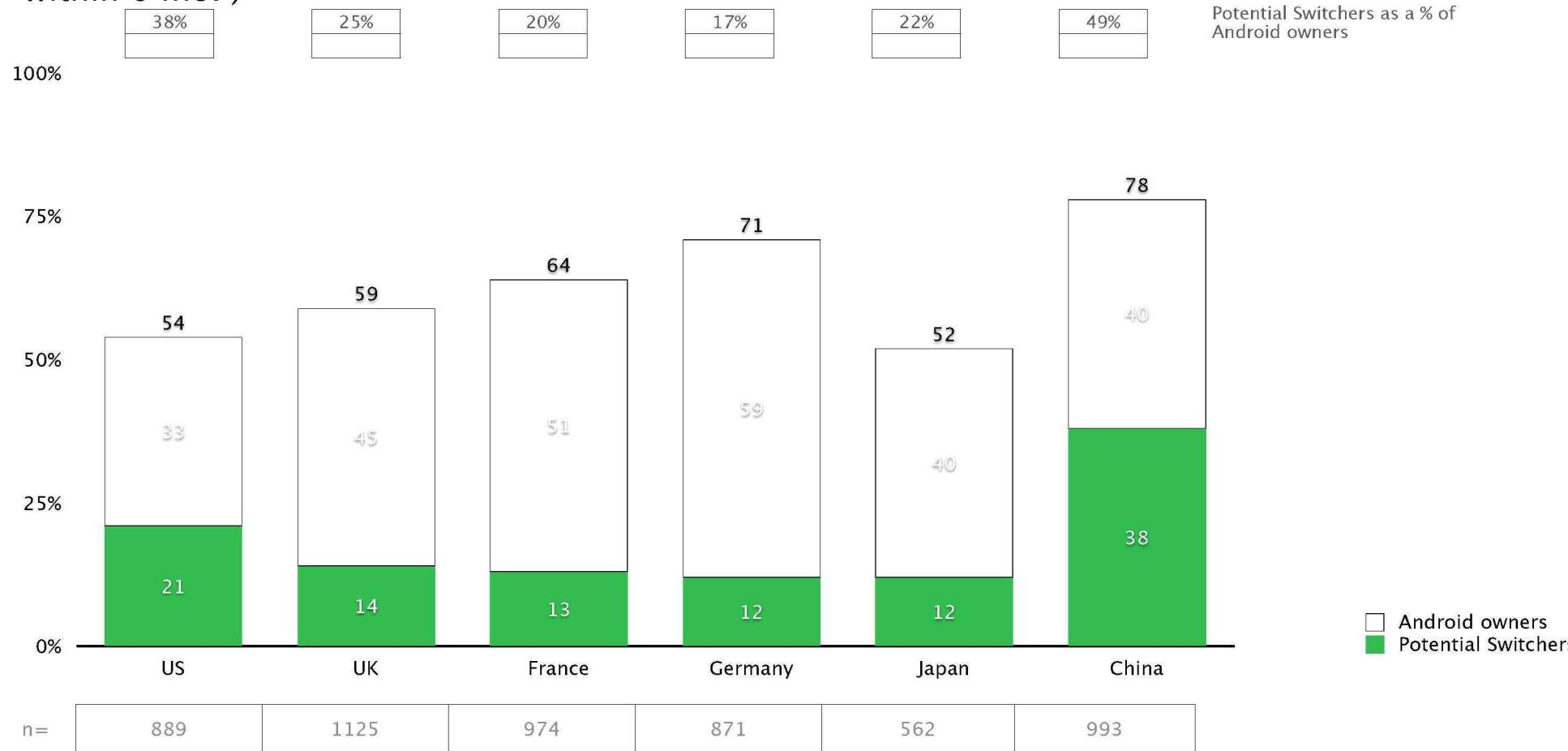


Base: Smartphone buyers within the past 9 months (includes those not meeting all screening criteria)
 Switchers are iPhone buyers (within the past 9 months), and their last smartphone was an Android

APPLE
CONFIDENTIAL X

The opportunity around potential switchers is highest in China, followed by the US

Potential switchers (as a percentage of >6 mo. smartphone owners, planning next purchase within 6 mo.)



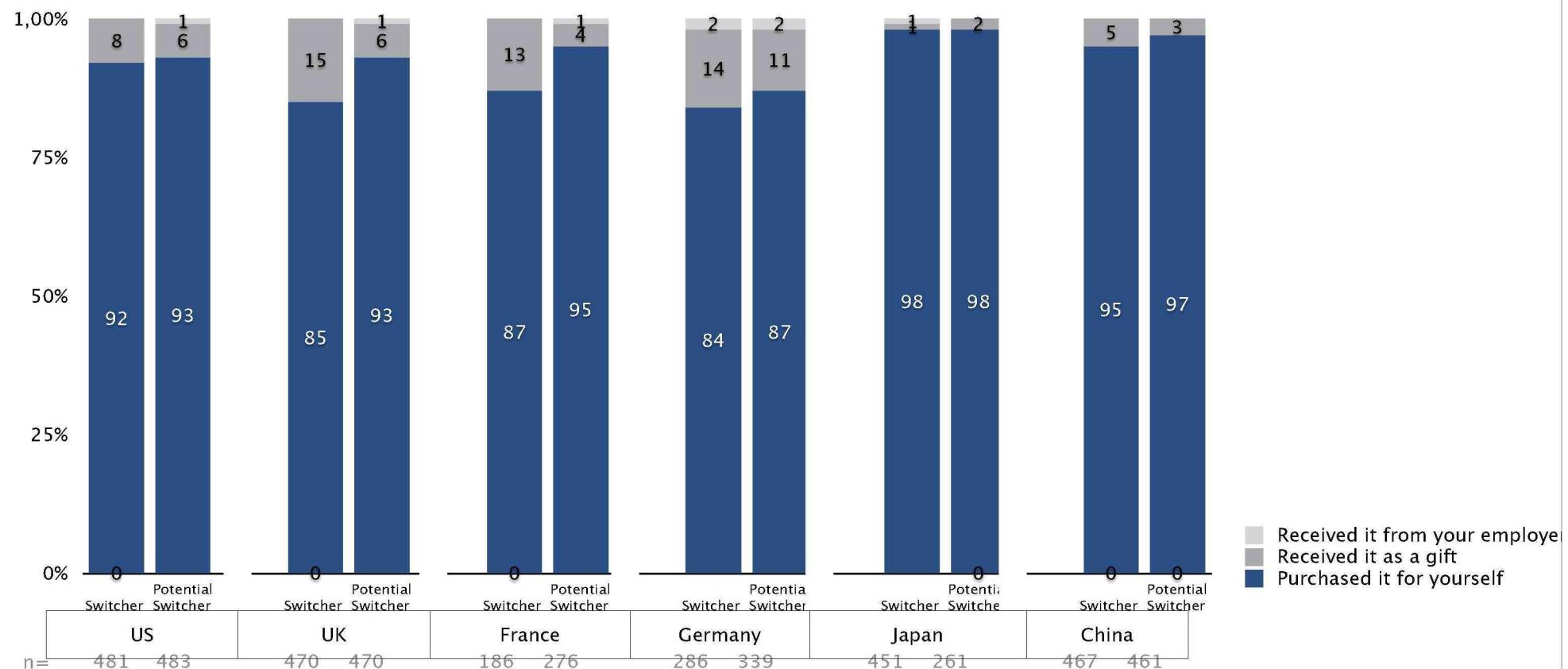
Base: Smartphone owners (for more than 6 months) whose next smartphone purchase is within 6 months (includes those not meeting all screening criteria)
 Potential switchers are Android smartphone owners (for more than 6 months), and are seriously considering an iPhone for their next purchase (within 6 months)

APPLE
CONFIDENTIAL X

Current smartphone acquisition

X

Current smartphone acquisition



Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

S6a: Thinking about the smartphone you most recently acquired, how did you acquire this smartphone?

APPLE
CONFIDENTIAL X

Location of current smartphone purchase

	US Switchers	US Potential Switchers	UK Switchers	UK Potential Switchers	France Switchers	France Potential Switchers	Germany Switchers	Germany Potential Switchers	Japan Switchers	Japan Potential Switchers	China Switchers	China Potential Switchers
Retail (NET)	69%	73%	50%	62%	56%	57%	55%	63%	92%	88%	61%	54%
Wireless service provider retail store	45%	45%	20%	31%	14%	23%	22%	22%	65%	43%	2%	4%
Apple-owned retail store	13%	—	13%	—	9%	—	11%	—	2%	—	29%	—
Consumer electronics retail store	8%	14%	6%	6%	7%	9%	13%	25%	21%	25%	12%	14%
Another retail location	4%	8%	2%	3%	3%	5%	2%	2%	1%	0%	0%	0%
Phone manufacturer-owned retail store	—	6%	—	7%	—	5%	—	5%	—	15%	—	19%
Multi-carrier phone shop	—	—	9%	16%	23%	15%	8%	8%	4%	6%	—	—
Mass merchant store (e.g., Jiangsu Five Star)	—	—	—	—	—	—	—	—	—	—	11%	10%
TCS/ITS	—	—	—	—	—	—	—	—	—	—	6%	7%
Online/on the web (NET)	28%	25%	42%	36%	32%	40%	34%	32%	7%	11%	19%	22%
Website of wireless service provider	17%	12%	17%	14%	11%	12%	14%	12%	2%	3%	2%	1%
Auction website	4%	2%	5%	4%	2%	2%	7%	3%	1%	1%	1%	0%
Website of a phone manufacturer	3%	3%	6%	3%	1%	4%	2%	2%	2%	1%	8%	12%
Website of a consumer electronics store	2%	4%	4%	5%	8%	12%	4%	4%	0%	1%	8%	9%
Website of multi-carrier phone shop	—	—	7%	7%	5%	4%	4%	6%	2%	3%	—	—
E-commerce site (eg. JD.com, Tmall, Taobao)	—	—	—	—	—	—	—	—	—	—	19%	23%
Another website	1%	4%	3%	3%	5%	5%	3%	6%	0%	2%	0%	0%
Elsewhere	2%	2%	6%	1%	8%	3%	9%	4%	0%	1%	1%	0%
Don't know	1%	1%	3%	0%	4%	1%	2%	1%	1%	0%	0%	0%
n=	481	483	470	470	186	276	286	339	451	261	467	461
	%	10	20	30	40	50	60	70	80	90	100	

Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q20: Where was your [BRAND] smartphone purchased?

APPLE
CONFIDENTIAL X

How current smartphone was purchased

	US Switchers	US Potential Switchers	UK Switchers	UK Potential Switchers	France Switchers	France Potential Switchers	Germany Switchers	Germany Potential Switchers	Japan Switchers	Japan Potential Switchers	China Switchers	China Potential Switchers
Paying for it monthly	36%	16%	—	—	—	—	—	—	—	—	—	—
Discounted phone for signing a 2-year contract	34%	40%	—	—	—	—	—	—	76%	65%	—	—
Paid full price upfront	28%	42%	45%	42%	74%	83%	58%	60%	20%	33%	—	—
Paying in monthly installments over a period of time	—	—	30%	42%	10%	8%	20%	21%	—	—	—	—
Paid an upfront fee along with monthly installments over a period of time	—	—	19%	12%	11%	5%	13%	12%	—	—	—	—
Pay full price (without subsidy)	—	—	—	—	—	—	—	—	—	—	80%	80%
Discounted mobile tariff for buying the phone	—	—	—	—	—	—	—	—	—	—	5%	7%
Discounted phone for signing contract	—	—	—	—	—	—	—	—	—	—	5%	7%
Pay monthly (without subsidy)	—	—	—	—	—	—	—	—	—	—	10%	6%
Paying for it monthly	—	—	—	—	—	—	—	—	0%	0%	—	—
Another way	1%	1%	6%	4%	4%	3%	6%	4%	2%	2%	0%	0%
Don't know	1%	1%	1%	0%	2%	0%	4%	3%	1%	0%	0%	0%
n=	481	483	470	470	186	276	286	339	451	261	467	461
	%	10	20	30	40	50	60	70	80	90	100	

Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q21: How was your [BRAND] smartphone purchased?

APPLE
CONFIDENTIAL X

Current mobile provider

	US Switchers	US Potential Switchers	UK Switchers	UK Potential Switchers	France Switchers	France Potential Switchers	Germany Switchers	Germany Potential Switchers	Japan Switchers	Japan Potential Switchers	China Switchers	China Potential Switchers
Verizon Wireless	32%	26%	—	—	—	—	—	—	—	—	—	—
AT&T	27%	26%	—	—	—	—	—	—	—	—	—	—
T-Mobile	18%	19%	3%	6%	—	—	22%	21%	—	—	—	—
Sprint	14%	11%	—	—	—	—	—	—	—	—	—	—
O2	—	—	28%	25%	—	—	20%	22%	—	—	—	—
EE	—	—	27%	18%	—	—	—	—	—	—	—	—
Vodafone	—	—	12%	19%	—	—	33%	24%	—	—	—	—
Three	—	—	11%	12%	—	—	—	—	—	—	—	—
Orange	—	—	2%	5%	38%	38%	—	—	—	—	—	—
SFR	—	—	—	—	20%	23%	—	—	—	—	—	—
Free Mobile	—	—	—	—	20%	21%	—	—	—	—	—	—
Bouygues	—	—	—	—	18%	14%	—	—	—	—	—	—
E-Plus	—	—	—	—	—	—	12%	15%	—	—	—	—
NTT DoCoMo	—	—	—	—	—	—	—	—	53%	62%	—	—
KDDI	—	—	—	—	—	—	—	—	31%	25%	—	—
Softbank Mobile	—	—	—	—	—	—	—	—	15%	9%	—	—
China Mobile	—	—	—	—	—	—	—	—	—	—	76%	73%
China Unicom	—	—	—	—	—	—	—	—	—	—	15%	14%
China Telecom	—	—	—	—	—	—	—	—	—	—	8%	13%
Another wireless service provider	9%	18%	17%	15%	4%	5%	12%	17%	1%	5%	0%	0%
n=	481	483	470	470	186	276	286	339	451	261	467	461



Base: iPhone owners (switchers); Android smartphone owners (potential switchers)
Q22: Which wireless service provider are you using with your [BRAND] smartphone?

APPLE
CONFIDENTIAL X

Devices owned at time of smartphone purchase

	US Switchers	US Potential Switchers	UK Switchers	UK Potential Switchers	France Switchers	France Potential Switchers	Germany Switchers	Germany Potential Switchers	Japan Switchers	Japan Potential Switchers	China Switchers	China Potential Switchers
Laptop computers (NET)	79%	78%	77%	81%	85%	89%	83%	82%	65%	73%	75%	80%
Apple Mac	23%	12%	14%	10%	18%	10%	18%	12%	6%	9%	11%	9%
Lenovo	4%	5%	8%	8%	3%	4%	6%	10%	3%	7%	27%	30%
Tablets (NET)	78%	70%	76%	66%	74%	74%	61%	52%	28%	39%	76%	74%
Apple iPad	54%	29%	50%	31%	42%	20%	32%	21%	16%	24%	51%	43%
Kindle Fire	19%	23%	10%	9%	0%	1%	4%	5%	0%	2%	7%	2%
Samsung Galaxy tablet	12%	20%	15%	21%	21%	29%	21%	18%	0%	2%	7%	11%
HDTVs (NET)	66%	72%	69%	67%	71%	79%	55%	51%	8%	11%	63%	67%
Samsung HDTV	26%	29%	27%	26%	25%	34%	32%	27%	0%	0%	17%	16%
Desktop computers (NET)	57%	64%	51%	51%	64%	75%	54%	60%	43%	57%	66%	78%
Lenovo	4%	3%	4%	5%	2%	6%	3%	4%	2%	2%	26%	32%
Blu-ray, DVD, home theater systems (NET)	52%	68%	46%	52%	49%	55%	40%	45%	27%	43%	28%	29%
Sony Blu-ray, DVD player, or home theater	21%	25%	17%	15%	9%	10%	12%	12%	6%	12%	10%	10%
Samsung Blu-ray, DVD player, or home theater	19%	21%	13%	14%	13%	16%	14%	16%	0%	1%	9%	9%
Media streamers (NET)	33%	36%	26%	23%	32%	36%	22%	13%	4%	4%	50%	52%
Smart watches (NET)	12%	11%	11%	7%	18%	20%	8%	5%	2%	3%	31%	30%
None of the above	3%	3%	3%	4%	1%	1%	2%	3%	9%	4%	2%	1%
n=	481	483	470	470	186	276	286	339	451	261	467	461
	%	10	20	30	40	50	60	70	80	90	100	

*Showing all NETs and individual selections above 20% in any country (except for "Other" [device category] brands)

Base: iPhone owners (switchers); Android smartphone owners (potential switchers)

Q23: At the time you acquired your [BRAND] smartphone, which of these devices – if any – did you own and use at least once a month?

APPLE
CONFIDENTIAL X

Influential research sources in iPhone purchase

Influential research sources (among switchers)

	US	UK	France	Germany	Japan	China
Talking to friends, family, co-workers either in-person or online (email, social media, etc.)	41%	40%	41%	34%	22%	34%
Trying a friend, family member or co-worker's phone	29%	35%	52%	34%	27%	38%
Reading product blogs, reviews, or articles (online or print)	28%	23%	18%	36%	17%	27%
Trying the phone at a retail store	25%	18%	17%	13%	22%	27%
Visiting a wireless service provider's retail store	20%	14%	8%	10%	19%	7%
Saw advertising	20%	13%	12%	17%	10%	20%
Visiting the smartphone manufacturer's website	19%	23%	19%	24%	24%	26%
Speaking to a salesperson	13%	8%	17%	7%	15%	6%
Visiting the smartphone manufacturer's retail store	11%	12%	11%	6%	7%	13%
Using a comparison shopping website	10%	10%	13%	18%	7%	22%
Visiting some other retail store	6%	5%	4%	4%	6%	4%
Visiting some other website	5%	7%	3%	6%	4%	7%
Receiving a demonstration from a salesperson	5%	5%	2%	5%	2%	9%
Visiting a TCS/ITS	—	—	—	—	—	7%
Some other type of research	3%	2%	3%	3%	1%	0%
n=	481	470	186	286	451	467

1st Highest

2nd Highest

3rd Highest

Base: iPhone owners (switchers)

Q4: What kind of research – if any – was most influential in your decision to acquire your [IPHONE MODEL] smartphone? [Select up to 3]

APPLE
CONFIDENTIAL

X

iPhone owners (non-switchers)

X

Why purchased iPhone over an Android smartphone?

Reasons for buying iPhone over Android (among iPhone repeat owners)—select all that apply

	US	UK	France	Germany	Japan	China
Easier to use	43%	39%	35%	43%	49%	28%
Wanted apps made by Apple for the iPhone	36%	36%	28%	30%	11%	26%
I didn't want to lose the apps and other content I had purchased on my	33%	37%	38%	36%	31%	15%
Didn't want to learn how to use something new	31%	25%	22%	23%	7%	4%
The operating system is always up-to-date	30%	34%	28%	43%	10%	24%
Wanted a reliable smartphone (e.g., crashes or freezes less)	30%	28%	19%	41%	15%	36%
Better physical appearance and design	27%	33%	35%	44%	19%	24%
Wanted access to iTunes	27%	31%	21%	28%	14%	11%
Wanted better integration with Apple products and services	26%	29%	17%	24%	13%	22%
Preferred the size of the phone	26%	23%	17%	21%	13%	25%
Access to better quality apps	25%	25%	23%	25%	11%	36%
Camera takes higher quality pictures	25%	27%	26%	28%	11%	34%
Wanted a faster smartphone	24%	25%	22%	23%	9%	38%
Ease of sharing files (e.g., photos, documents, music, video) across	23%	21%	19%	29%	8%	13%
Wanted a higher quality screen	23%	21%	20%	23%	7%	36%
Wanted a simple experience where everything is already set up for me	19%	20%	17%	16%	2%	11%
Better security	19%	15%	14%	24%	16%	35%
Better value for the money	16%	11%	9%	10%	9%	18%
Wanted better battery life	16%	13%	9%	12%	6%	15%
More durable	16%	12%	13%	10%	3%	19%
Moving between different screens and apps is intuitive	14%	14%	15%	14%	7%	8%
Better privacy of my personal information	12%	6%	8%	19%	5%	11%
Android smartphones slow down over time	8%	6%	6%	14%	1%	22%
Wanted a smartphone that fewer people have	3%	3%	3%	3%	0%	5%
Other reasons	8%	5%	5%	5%	4%	0%
n=	898	630	457	408	901	204



Base: iPhone non-switchers, who currently own iPhone and whose prior phone was also iPhone (terminated respondents, did not qualify for survey)
 S21: Thinking about your most recent smartphone purchase, which of the following best describes why you decided to buy an iPhone rather than an
 Android-based smartphone?

HIGHLY CONFIDENTIAL
X

Why purchased iPhone over an Android smartphone?

Reasons for buying iPhone over Android (among first-time smartphone owner)—select all that apply

	US	UK	France	Germany	Japan	China
Wanted a smartphone with the iPhone OS (iOS)	38%	39%	26%	40%	37%	38%
Easier to use	37%	39%	37%	35%	27%	30%
Familiarity with other Apple products	33%	34%	28%	38%	8%	20%
Wanted a reliable smartphone (e.g., crashes or freezes less)	26%	25%	20%	25%	14%	30%
Camera takes higher quality pictures	25%	25%	27%	25%	7%	25%
Better value for the money	23%	14%	14%	11%	7%	20%
Wanted apps made by Apple for the iPhone	21%	28%	22%	19%	8%	17%
The operating system is always up-to-date	21%	25%	5%	27%	5%	21%
Wanted a simple experience where everything is already set up for me	21%	16%	19%	10%	2%	14%
Preferred the size of the phone	20%	17%	15%	19%	15%	22%
Better physical appearance and design	20%	24%	28%	28%	16%	22%
Wanted a higher quality screen	20%	18%	24%	16%	5%	35%
Wanted access to iTunes	19%	22%	18%	20%	8%	10%
Access to better quality apps	19%	23%	24%	19%	11%	32%
Wanted a faster smartphone	18%	18%	21%	19%	5%	30%
More durable	17%	10%	19%	10%	3%	26%
Ease of sharing files (e.g., photos, documents, music, video) across	17%	18%	16%	20%	4%	14%
Better security	17%	16%	13%	20%	15%	38%
Wanted better integration with Apple products and services	16%	19%	13%	19%	6%	15%
Wanted better battery life	15%	13%	10%	12%	4%	18%
Moving between different screens and apps is intuitive	11%	14%	15%	11%	4%	8%
Better privacy of my personal information	11%	12%	8%	13%	4%	15%
Wanted a smartphone that fewer people have	5%	5%	6%	7%	1%	11%
Android smartphones slow down over time	5%	6%	6%	9%	1%	14%
Other reasons	14%	11%	6%	9%	11%	1%
n=	606	359	288	248	627	169



Base: First-time smartphone owners (first mobile or first smartphone) who own an iPhone (terminated respondents, did not qualify for survey)

S22: Thinking about your most recent smartphone purchase, which of the following best describes why you decided to buy an iPhone rather than an Android-based smartphone?

HIGHLY CONFIDENTIAL
X

TM and © 2016 Apple Inc. All rights reserved.

APPLE
CONFIDENTIAL 40