

## Press information

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### **Android edges toward 70% in Europe as battle emerges between manufacturers**

*LG, Sony and Motorola look to build on recent success at Mobile World Congress*

The latest smartphone sales data from Kantar Worldpanel ComTech, for the three months to January 2014, shows Android retain its top spot as the leading OS across Europe with 68.5% share, although Samsung's dominance of this market is being eroded. Apple holds second place with 19.0% while Windows Phone remains the fastest growing European OS, with 10.1% share.

Dominic Sunnebo, strategic insight director at Kantar Worldpanel ComTech, comments: "In Europe Android continues to move towards 70% share, and the real battle now is among the Android manufacturers. Samsung is dominant, with 39.5% of sales, but this is lower compared with last year. Its position is being eroded by the likes of LG (6.9%), Sony (9.4%) Motorola (1.7%) and new brand Wiko (2%) which are all increasing their share of sales. All of these brands will be hoping their new releases at Mobile World Congress will be well received and help boost performance in 2014."

Despite underwhelming fourth quarter results, Windows Phone has managed to hold onto double digit share across Europe for four consecutive months. Its success continues to be driven by Nokia's budget Lumia 520 which was the fourth highest selling handset in Britain during the past three months, only just behind the Apple 5C.

Sunnebo continues: "Nokia has continued its successful tactic of sucking up remaining featurephone owners across Europe. Even in Britain, where smartphone penetration is at 70%, there are over 14 million featurephone consumers for it to target. At some point Nokia will have to start making serious inroads into the smartphone competition, but for the time being its strategy in Europe is working. Crucial for Nokia will be its ability to keep low-end owners loyal and upgrade them to mid to high-end models."

For Apple, there are encouraging signs as sales of its 5C model start to take off. When Apple first launched its new iPhones in Britain the 5S outsold the 5C by 3:1. However, the iPhone 5C has gained momentum and was the third best-selling smartphone over the past three months, reducing the 5S/C ratio to 2:1. There is a stark gender divide between 5C and 5S buyers – in Britain 74% of 5C buyers are female versus just 36% for the 5S. There are also clear differences in how each device is used. 5S users are more engaged with their device, particularly for data heavy functions such as watching mobile TV or downloading music.

### **China's phablet phenomenon**

The phablet trend continues to power ahead in China, where almost a third (31%) of smartphones sold in the past three months had screen size of over 5". Some 9% sold had screens larger than 5.5".

Sunnebo comments: "Phablet sales across Europe and US have been gradually rising, but it's China which is driving demand. Phablet owners are less likely than the average consumer to own a tablet, indicating that phablets are increasingly being used as the primary device to browse online in China.

"Interestingly, phablet ownership in China is skewed heavily to women, running counter to Europe and the US where it tends to be young, male early adopters. It's too early to forecast the long-term trends for China, but in Europe where the first wave of phablet owners are now coming to upgrade, over 40% are down-sizing to a smaller device. Manufacturers targeting the Chinese market should bear this trend in mind in the coming years."

Smartphone % penetration in Great Britain stood at 70% in January, with 86% of devices sold in the past three months being smartphones.

\*The big five European markets includes UK, Germany, France, Italy and Spain.

**Kantar Worldpanel ComTech will release a new report at Mobile World Congress on Wednesday 26 February entitled '*Mobile Trends That Matter Tomorrow*'.**

**Please visit [www.kantarworldpanel.com](http://www.kantarworldpanel.com) from 12.30pm (GMT) to access the report on consumer behaviours that will drive tomorrow's trends in mobile. If you're at Mobile World Congress, come visit us at Hall 8.1 Stand D51.**

**Historic global OS share data can now be viewed online. Visit <http://www.kantarworldpanel.com/smartphone-os-market-share> for more information.**

Basically this will help to view charts with the OS market share in any country and even to compare shares in two countries or in two different times in every country.

Ends

### Smartphone OS Sales Share (%)

Germany	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change	USA	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change
Android	70.3	75.1	4.8	Android	48.8	54.8	6.0
BlackBerry	0.6	0.8	0.2	BlackBerry	1.0	0.6	-0.4
iOS	21.7	16.2	-5.5	iOS	46.6	38.9	-7.7
Windows	3.9	6.8	2.9	Windows	3.0	5.0	2.0
Other	3.4	1.1	-2.3	Other	0.6	0.7	0.1
GB	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change	China	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change
Android	55.9	55.2	-0.7	Android	72.7	80.9	8.2
BlackBerry	5.7	2.4	-3.3	BlackBerry	0.0	0.2	0.2
iOS	31.0	30.7	-0.3	iOS	22.1	17.4	-4.7
Windows	6.4	11.3	4.9	Windows	1.4	0.7	-0.7
Other	1.1	0.3	-0.8	Other	3.9	0.8	-3.1
France	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change	Australia	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change
Android	62.2	65.2	3.0	Android	57.9	57.7	-0.2
BlackBerry	5.1	1.8	-3.3	BlackBerry	0.5	0.3	-0.1
iOS	24.9	22.2	-2.7	iOS	36.0	35.1	-0.9
Windows	6.4	9.6	3.2	Windows	3.4	5.1	1.8
Other	1.4	1.2	-0.2	Other	2.3	1.7	-0.6
Italy	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change	Japan	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change
Android	56.8	67.3	10.5	Android	32.2	30.5	-1.7
BlackBerry	2.4	2.1	-0.3	BlackBerry	0.3	0.0	-0.3
iOS	22.4	12.6	-9.8	iOS	66.1	68.7	2.6
Windows	13.2	17.0	3.8	Windows	0.6	0.0	-0.6
Other	5.2	1.0	-4.2	Other	0.8	0.8	0.0
Spain	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change	EU5	3 m/e Jan 2013	3 m/e Jan 2014	% pt. Change
Android	89.6	86.6	-3.0	Android	65.1	68.5	3.4
BlackBerry	2.1	0.0	-2.1	BlackBerry	3.4	1.5	-1.9
iOS	5.2	7.2	2.0	iOS	22.9	19.0	-3.9
Windows	1.0	5.3	4.3	Windows	6.1	10.1	3.9
Other	2.2	1.0	-1.2	Other	2.5	0.9	-1.5

#### About Kantar Worldpanel ComTech's Smartphone OS market share data

Kantar Worldpanel ComTech's smartphone OS market share data provides the media and businesses with access to the most up to date sales market share figures for the major smartphone OS.

This information is based on the research extracted from the Kantar Worldpanel ComTech global consumer panel. ComTech is the largest continuous research consumer mobile phone tracking panel of its kind in the world, conducting over one million interviews per year in Europe alone. ComTech tracks mobile phone behaviour, including purchasing of phones, mobile phone bills/airtime, source of purchase and phone usage and delivers beyond market share tracking to understand drivers of share changes, market dynamics through consumer insight - the data included in this release is excluding enterprise sales  
For US-specific data or comment, please contact Carolina Milanesi, director at Kantar Worldpanel ComTech, at [Carolina.Milanesi@kantarworldpanel.com](mailto:Carolina.Milanesi@kantarworldpanel.com)

## **About Kantar Worldpanel**

Kantar Worldpanel is the world leader in consumer knowledge and insights based on continuous consumer panels. Its **High Definition Inspiration™** approach combines market monitoring, advanced analytics and tailored market research solutions to deliver both the big picture and the fine detail that inspire successful actions by its clients. Kantar Worldpanel's expertise about what people buy or use – and why – has become the market currency for brand owners, retailers, market analysts and government organisations globally.

With over 60 years' experience, a team of 3,000, and services covering more than 50 countries directly or through partners, Kantar Worldpanel delivers High Definition Inspiration™ in fields as diverse as FMCG, impulse products, fashion, baby, telecommunications and entertainment, among many others.

For further information, please visit us at [www.kantarworldpanel.com/comtech](http://www.kantarworldpanel.com/comtech) and follow us on Twitter [https://twitter.com/kwp\\_comtech](https://twitter.com/kwp_comtech)

## **About Kantar**

Kantar is the data investment management division of WPP and one of the world's largest insight, information and consultancy groups. By connecting the diverse talents of its 13 specialist companies, the group aims to become the pre-eminent provider of compelling and inspirational insights for the global business community. Its 28,500 employees work across 100 countries and across the whole spectrum of research and consultancy disciplines, enabling the group to offer clients business insights at every point of the consumer cycle. The group's services are employed by over half of the Fortune Top 500 companies.

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