

**U.S. Regional &  
Small Carrier  
Smartphone  
Forecast, 2011-  
2016**

Market Study  
2Q 2012





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# **U.S. Regional & Small Carrier Smartphone Market Forecast, 2011-2016**

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## Market Study

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## Abstract

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It's no secret that the U.S. mobile handset market is maturing at a rapid pace. With a wireless subscriber base of more than 330 million according to the CTIA, dozens upon dozens of handsets available, and users clamoring for "always on" connectivity to their contacts, games, music and the web, operators, vendors and developers alike are trying to capture their share of the market.

In the U.S., four main operators (a.k.a. Tier One) provide devices and services to the majority of subscribers. Due primarily to their size and scale, these operators are typically the most aggressive in terms of network technology upgrades (particularly to 4G LTE), and in terms of obtaining the latest devices of increasing capability (e.g., faster processors, powerful cameras, etc.). However, smaller carriers and rural operators continue to compete, both in terms of technology and devices – MetroPCS, C-Spire, Leap and U.S. Cellular are all good examples of smaller/regional carriers who are innovating.

As time goes on, what will become of these smaller/regional operators? Will they be able to capitalize on the rise of smartphones and 4G? Or, will they be left behind?

The following report discusses *iGR's* forecast of total U.S. mobile handset sales, smartphone vs. non-smartphone sales, and mobile operating system (OS) sales across U.S. operators from 2011-2016, specifically in terms of operators.

### Key Questions Addressed:

- What device trends will impact U.S. handset sales from 2011-2016?
- What mobile operating system (OS) trends will impact U.S. handset sales from 2011-2016?
- What share of total U.S. mobile handset sales did smaller/regional carriers garner in 2011?
- What share of total U.S. mobile handset sales will smaller/regional carriers gain by the end of 2016?
- Will smaller/regional carriers see gains in non-smartphone device sales share by the end of 2016?
- Will smaller/regional carriers see gains in smartphone sales share by the end of 2016?
- What mobile OS trends will impact smaller/regional carriers from 2011-2016?

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This report is recommended for:

- Cellular carriers, particularly smaller/regional operators in the U.S.
- Private/ Independent mobile device retailers with U.S. customers
- Mobile device OEMs interested in the U.S. market
- Mobile software developers creating content for U.S. end users
- Financial and investment analysts.

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