



智能手机调查报告

Survey Report of Smart Phones

2014Q4

(简版)

(Abbreviated Version)

QQSurvey 中国在线调研

QQSurvey China Online Research

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目录

Contents

调查要求

Survey Requirements

智能手机消费者调查

Smart Phone Consumers Research

教育程度

Educational Status

个人收入

Personal Income

家庭月收入

Family Monthly Income

购买智能手机的渠道

Purchase Channel of Smart Phones

预期购买哪些品牌智能手机

Mobile Brands of Anticipated Buying Smart Phones

购买智能手机价格段

Price Range of Smart Phones

法律声明

Legal Notice

调查问卷

Questionnaire

调查要求

Survey Requirements

配额

Quota

区域配额	
珠三角地区(含广州、深圳、东莞、惠州、中山、珠海及周边等城市)	344
长三角地区(含上海、杭州、南京、苏州、无锡、扬州、温州、义乌及周边等城市)	343
环渤海地区(含北京、烟台、天津、大连、威海、青岛等城市)	343

Regional quota	
Pearl river delta region (including Guangzhou, Shenzhen, Dongguan, Huizhou, Zhongshan, Zuhai, and other surrounding cities)	344
Yangtze river delta region (including Shanghai, Hangzhou, Nanjing, Suzhou, Wuxi, Yangzhou, Wenzhou, Yiwu, and other surrounding cities)	343
Circum-bohai sea region (including Beijing, Yantai, Tianjin, Dalian, Weihai, Qingdao, and other cities)	343

性别配额	
男	515
女	515

Gender quota	
Male	515
Female	515

年龄配额	
25 岁及以下	360
26-35 岁	450
36-45 岁	160
46 岁及以上	60

Age quota	
25 years old and under	360
26 to 35 years old	450
36 to 45 years old	160
46 years old and above	60

智能手机消费者调查

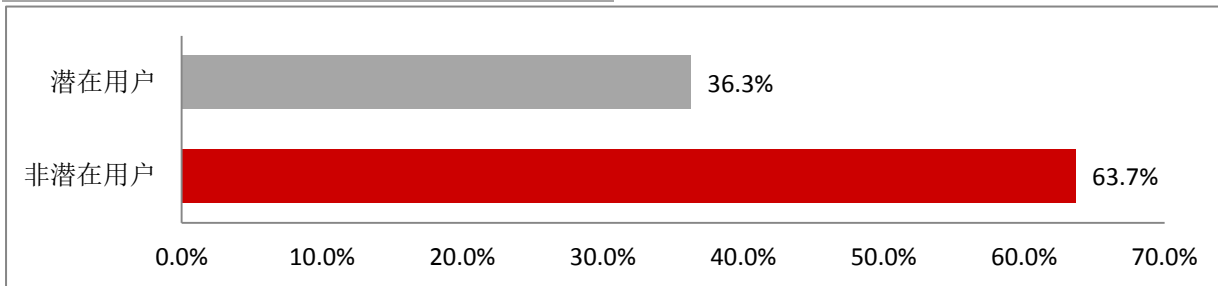
Smart Phone Consumers Research

QQSurvey 中国在线调研 2014Q4 智能手机调查是基于对中国 3846 位网民进行“预期未来三个月内(2014 年 12 月-2015 年 2 月底)是否会购买智能手机”，其中有 36.3%的消费者愿意未来三个月内购买智能手机，我们称之为潜在消费者；63.7%的网民没有意向在未来三个月内购买智能手机，我们称之为非潜在的消费 者。

QQSurvey China online research 2014Q4 smart phone survey is based on 3846 Chinese netizens’ replies on whether or not they will purchase smart phones over the next three months (from Dec.2014 to the end of Feb. 2015). 36.3% consumers are willing to buy smart phones within the coming three months, which we call potential consumers; 63.7% have no intention of buying any smart phones in three months, which are named as non-potential consumers.

图表 1: 2014Q4 智能手机消费者指数图

Chart One: 2014Q4Smart Phone Consumer Index



教育程度

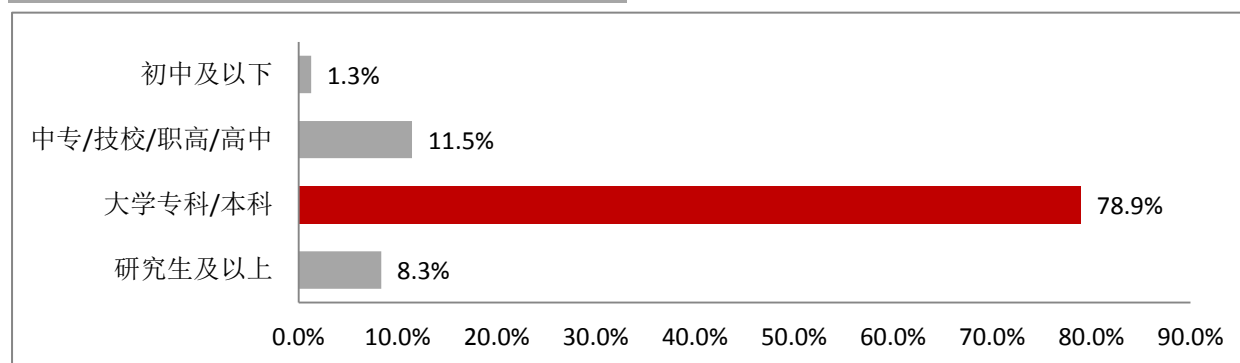
Educational Status

QQSurvey 中国在线调研 2014Q4 智能手机调查是基于对中国 1030 位“未来三个月内会购买智能手机”的网民进行的调研。在这 1030 位智能手机潜在使用者中，学历为大学专科/本科的占据 78.9%，成为最主要的消费群体。学历在高中及其以下的占据了 12.8%。而拥有研究生及以上的被访者则占据了 8.3%。整体来看，智能手机潜在消费者学历主要集中为大学专科/本科。

QQSurvey China online research 2014Q4 smart phone survey is based on the investigation of 1030 Chinese netizens who will purchase smart phones over the next three months. Among the 1030 potential users of smart phones, 78.9% of them are Junior college/ undergraduate college degree holders, becoming the major consumer group. 12.8% achieved education in high school and the following education, while respondents with graduate or above for 8.3%. All things considered, education status of smart phone potential consumers mainly concentrates on Junior college/ undergraduate college.

图表 2：2014Q4 智能手机消费者教育程度指数图

Chart One: 2014Q4 Smart Phone Consumer Index



个人收入

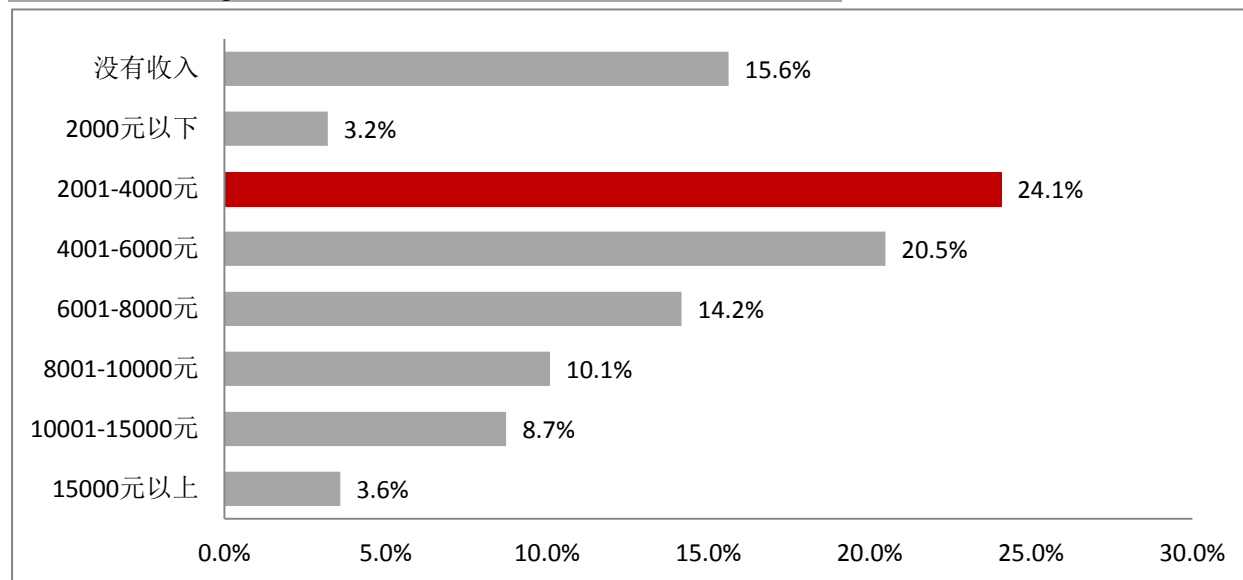
Personal Income

QQSurvey 中国在线调研数据显示，参与调查的 1030 位智能手机潜在消费者可支配个人月收入集中在 2000-15000 元，累计占比接近八成。其中个人月收入在 2001-4000 元的潜在消费者占了 24.1%，成为最主要的消费群体。其次是 4001-6000 元，占 20.5%，而没有收入的用户则以学生居多，他们对流行趋势较为敏感，占到了 15.6% 的比例。

Data from QQSurvey China online research shows that governable personal monthly income of the 1030 smart phone potential consumers participating in the survey focuses on 2000-15000 yuan, around eighty percent of the total. Among them, potential consumers with personal monthly income of 2001-4000 yuan account for 24.1%, being the major consumer group. Next is 4001-6000 yuan, holding 20.5%. Users with no income are mostly students, who are sensitive to fashion trends and take up 15.6%.

图表 3: 2014Q4 智能手机消费者个人收入指数图

Chart Two: 2014Q4 Smart Phone Consumer Education Status Index



家庭月收入

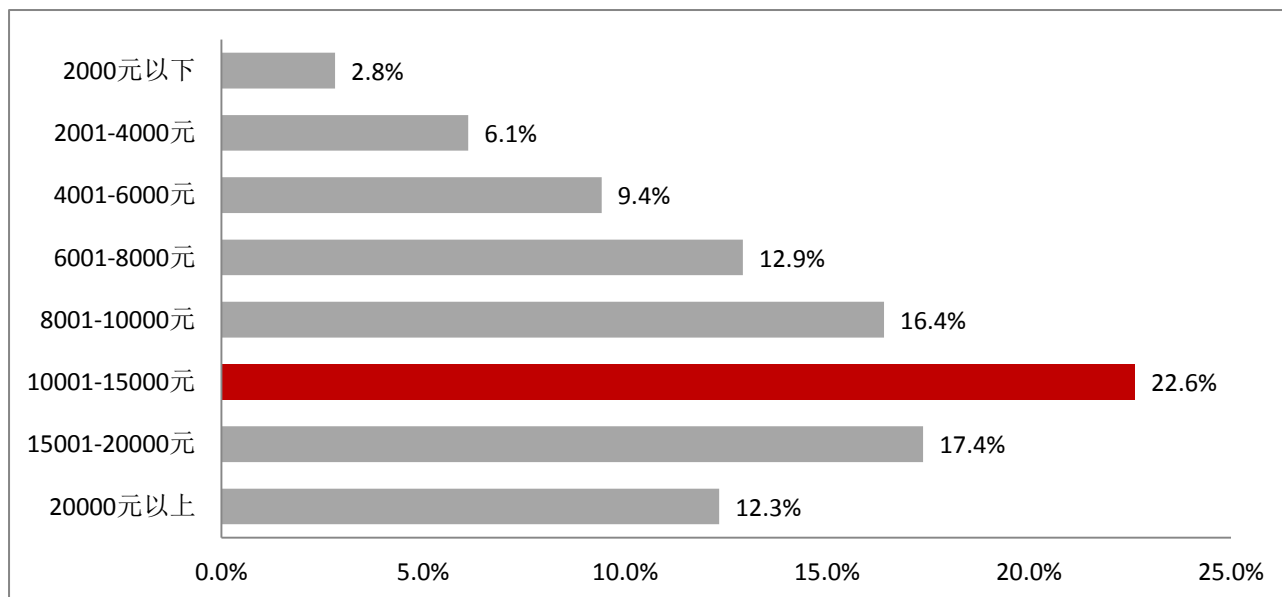
Family Monthly Income

QQSurvey 中国在线调研数据显示，参与调查的 1030 位智能手机潜在消费者可支配家庭月收入集中在 4000 元以上，累计占比超过九成。而其中家庭月收入在 10001-15000 元的潜在消费者占了 22.6%，成为最主要的消费群体。

Data from QQSurvey China online research presents that governable family monthly income of the 1030 smart phone potential consumers participating in the survey concentrates on 4000 yuan and above, more than ninety percent of the total. Moreover, potential consumers with family monthly income of 10001-15000 yuan account for 22.6%, which are the main consumer group.

图表 4: 20134Q4 智能手机消费者家庭收入指数图

Chart Four: 2014Q4 Smart Phone Consumer Family Income Index



购买智能手机的渠道

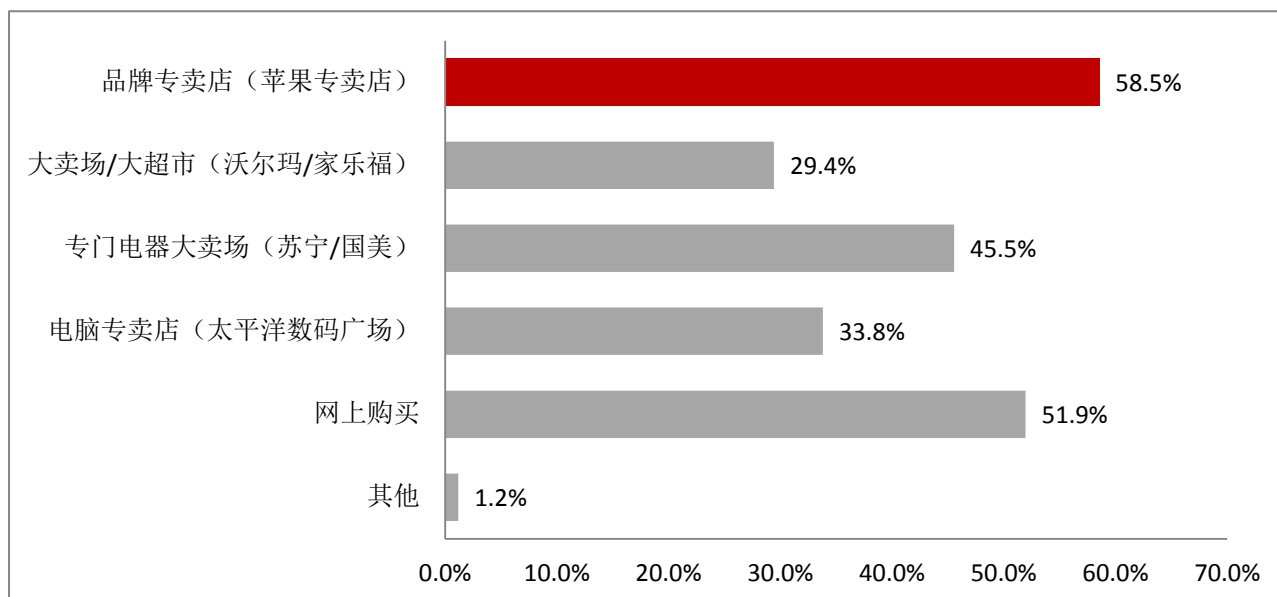
Purchase Channel of Smart Phones

QQSurvey 中国在线调研数据显示，参与调查的 1030 位智能手机潜在消费者在购买智能手机时的主要渠道是品牌专卖店，所占比例为 58.5%，其次是网上购买和专门电器大卖场，所占比例分别为 51.9%、45.5%，电脑专卖店和大卖场/大超市紧追其后，分别占据 33.8%、29.4%。

QQSurvey China online research reveals that purchase channels of 1030 smart phone potential consumers participating in the survey are mainly brand monopolized shop, accounting for 58.5%. Next are on-line shopping, holding and specialized appliance hypermarket, 51.9% and 45.5% of the total respectively. The above channels are followed by computer store and shopping mall/ hypermarket , taking up 33.8% and 29.4% separately.

图表 5: 2014Q4 智能手机消费者购买智能手机的渠道指数图

Chart Five: 2014Q4 Smart Phone Consumer Purchase Channel Index



预期购买哪些品牌

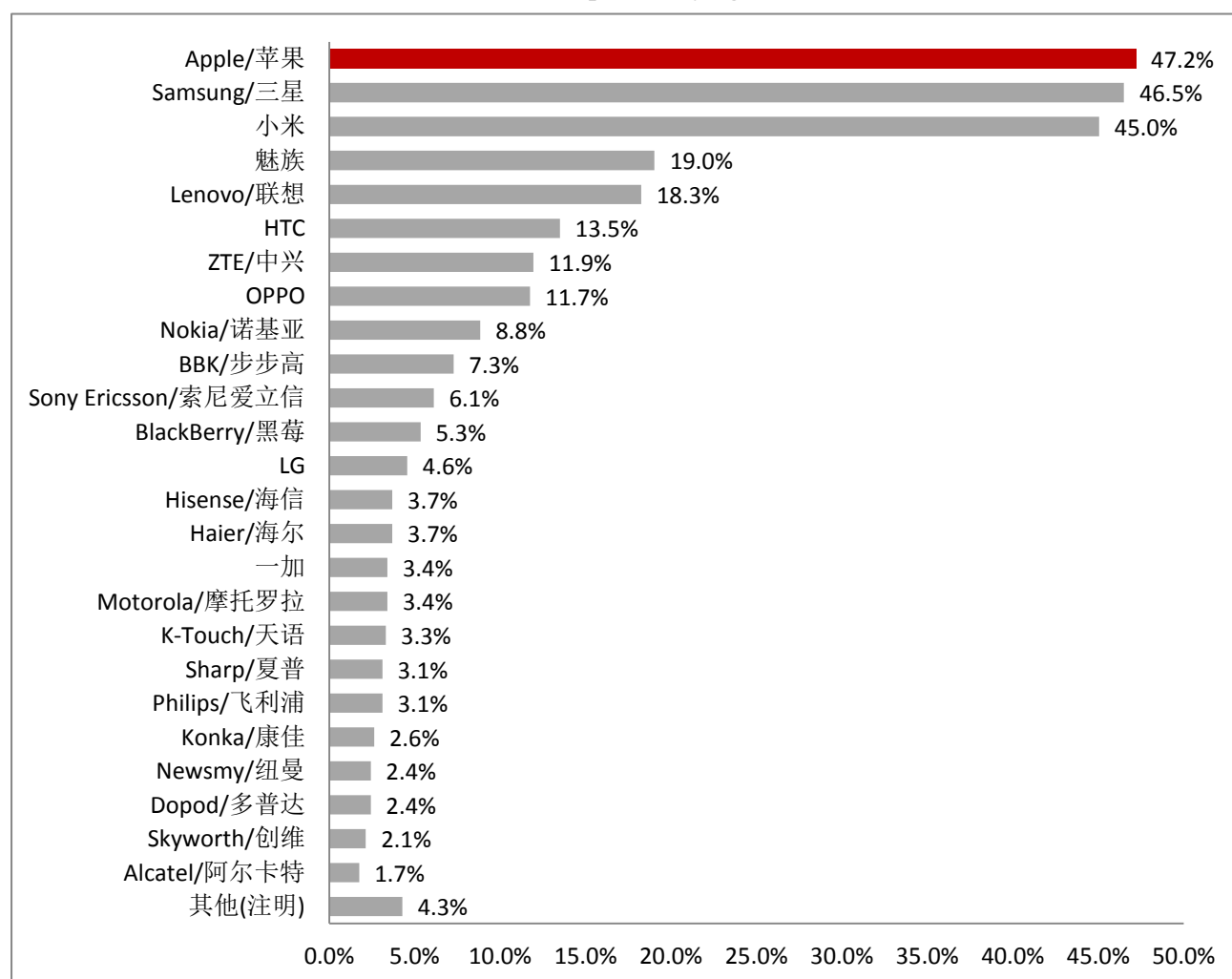
Mobile Brands of Anticipated Buying Smart Phones

智能手机潜在消费者中针对“预期购买哪些品牌”方面，苹果(Apple)、三星(Samsung)和小米占主导地位，分别占了 47.2%、46.5%和 45.0%比例。其次是魅族、联想，分别占了 19.0%、18.3%，紧追其后的是 HTC、ZTE 和 OPPO，占了 13.5%、11.9%和 11.7%。其他品牌的购买意向都低于百分之十，由此可以看出在消费者心目中苹果(Apple)、三星(Samsung)和小米还是占据绝对主导地位。

As for anticipated buying brands of smart phone potential consumers, Apple 、 Samsung and MI have absolute predominance, accounting for 47.2% 、 46.5%、 45.0% respectively. Next are MEIZU、Lenovo, accounting for 19.0% 、 18.3% respectively. which are followed by HTC、ZTE and OPPO accounting for 13.5%、11.9% 、 11.7% respectively. Purchase intentions of other brands are all below 10%. Thus we can see that Apple 、 Samsung and MI are still predominant powers in the eyes of consumers.

图表 6: 2014Q3 智能手机消费者预期购买哪些品牌指数图

Chart Six: 2014Q3 Smart Phone Consumers' Anticipated Buying Mobile Brands Index



智能手机价格段

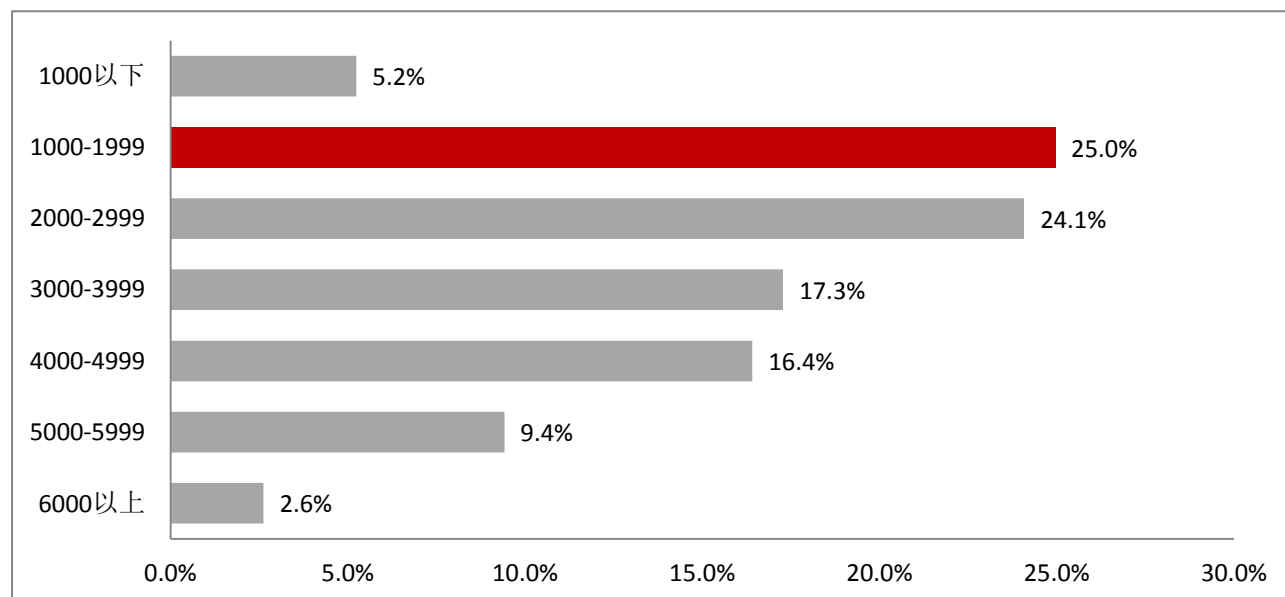
Price Range of Smart Phones

QQSurvey 中国在线调研数据显示,参与调查的 1030 位智能手机潜在消费者中针对“购买智能手机价格”方面,集中在 1000-4999 元,累计占比超过八成。分别为 1000-1999 元的占 25.0%、2000-2999 元的占 24.1%、3000-3999 元的占 17.3%和 4000-4999 元的占 16.4%, 由此可以看出消费者对智能手机的心理价位在 1000-4999 元这个趋势。

Data from QQSurvey China online research shows that anticipated buying price of the 1030 smart phone potential consumers participating in the survey centers on 1000-4999 yuan, More than eighty percent of the total. Going into details, they are respectively: 1000-1999 yuan, 25.0%; 2000-2999 yuan, 24.1%; 3000-3999 yuan, 17.3%; 4000-4999 yuan, 16.4%. Obviously there is a tendency that ideal price range of smart phones for consumers is 1000-4999 yuan.

图表 7: 2014Q4 智能手机消费者预期购买智能手机价格段指数图

Chart Seven: 2014Q3 Smart Phone Consumers' Anticipated Buying Price Range Index



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QQSurvey operates China's most active view sharing site --- 1diaocha (www.1diaocha.com)

QQSurvey 是中国信息协会市场研究业分会(CMRA)和欧洲市场研究协会(ESOMAR)会员

QQSurvey holds memberships of China Marketing Research Association (CMRA) and European Society for Opinion and Marketing Research (ESOMAR).

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附：调查问卷

Attachment: Questionnaire

智能手机 Smart Phones

S1. 您的性别? (单选)[控制配额, 避免男性答题者过多]

S1. Your gender? (Single choice) [Control quotas to avoid too many male respondents]

男	1
女	2

Male	1
Female	2

S2. 请问您的年龄是? (单选)

S2. Your age? (Single choice)

25 岁及以下	1
26-35 岁	2
36-45 岁	3
46 岁及以上	4

25 years old and under	1
26 to 35 years old	2
36 to 45 years old	3
46 years old and above	4

S3. 请问您所在的区域是? (单选)

S3. Your location? (Single choice)

珠三角地区(含广州、深圳、东莞、惠州、中山、珠海及周边等城市)	1
长三角地区(含上海、杭州、南京、苏州、无锡、扬州、温州、义乌及周边等城市)	2
环渤海地区(含北京、烟台、天津、大连、威海、青岛等城市)	3

Pearl river delta region (including Guangzhou, Shenzhen, Dongguan, Huizhou, Zhongshan, Zuhai, and other surrounding cities)	1
Yangtze river delta region (including Shanghai, Hangzhou, Nanjing, Suzhou, Wuxi, Yangzhou, Wenzhou, Yiwu, and other surrounding cities)	2
Circum-bohai sea region (including Beijing, Yantai, Tianjin, Dalian, Weihai, Qingdao, and other cities)	3

S4. 请问您的教育程度是? (单选)

S4. Your educational status? (Single choice)

初中及以下	1
中专/技校/职高/高中	2
大学专科/本科	3
研究生及以上	4

Junior high school or under	1
Technical secondary school/ vocational school/ professional high school/ high school	2
Junior college/ undergraduate college	3
Graduate or above	4

S5. 请问您的婚姻状况? (单选)

S5. Your marital status? (Single choice)

单身	1
同居/已婚	2
其他(如离婚/丧偶等)	3

Single	1
Cohabiting/married	2
Others (such as divorced, widowed, etc.)	3

S6. 请问您的工作? (单选)

S6. Your job? (Single choice)

全职人员	1	追问 S7 题
兼职人员	2	追问 S7 题
失业	3	跳问 S9 题
学生	4	跳问 S9 题
退休	5	跳问 S9 题
全职家庭主妇	6	跳问 S9 题

Full-time staff	1	Get to S7
Part-time staff	2	Get to S7
Unemployed	3	Jump to S9
Student	4	Jump to S9
Retired	5	Jump to S9
Full-time housewife	6	Jump to S9

S7. 请您告诉我您的职业? (单选)

S7. Your vocation? (Single choice)

高级行政管理(董事长/总经理/行政总裁)	1
部门经理/主管	2
私营业主/合伙人/个体户	3
专业人员-医生、律师、会计师等	4
政府人员/机关干部	5

其他技术白领	6
非技术白领/文员	7
技术蓝领	8
非技术蓝领	9
自由职业者	10
其他(注明_____)	11

Senior executive manager (board chairman/ general manager/ chief executive officer)	1
Department manager/ supervisor	2
Private owner/ partner/ individual household	3
Specialized persons – doctor, lawyer, accountant, etc	4
Governmental personnel/ government functionary	5
Other technical white-collar worker	6
Non-technical white-collar worker/ clerk	7
Technical blue-collar worker	8
Non-technical blue-collar worker	9
Freelance worker	10
Others (indication_____)	11

高级行政管理(董事长/总经理/行政总裁)	1
部门经理/主管	2
私营业主/合伙人/个体户	3
专业人员-医生、律师、会计师等	4
政府人员/机关干部	5
其他技术白领	6
非技术白领/文员	7
技术蓝领	8
非技术蓝领	9
自由职业者	10
其他(注明_____)	11

Senior executive manager (board chairman/ general manager/ chief executive officer)	1
Department manager/ supervisor	2
Private owner/ partner/ individual household	3
Specialized persons – doctor, lawyer, accountant, etc	4
Governmental personnel/ government functionary	5
Other technical white-collar worker	6
Non-technical white-collar worker/ clerk	7
Technical blue-collar worker	8

Non-technical blue-collar worker	9
Freelance worker	10
Others (indication_____)	11

S8. 请问下列哪一项最能形容您个人每月的平均收入? (单选)

S8. Which of the following best describes your personal monthly income? (Single choice)

2000 元以下	1
2001-4000 元	2
4001-6000 元	3
6001-8000 元	4
8001-10000 元	5
10001-15000 元	6
15000 元以上	7

2000 yuan and under	1
2001-4000 yuan	2
4001-6000 yuan	3
6001-8000 yuan	4
8001-10000 yuan	5
10001-15000 yuan	6
15000 yuan and above	7

S9. 请问下列哪一项最能代表您家庭每月的总收入呢? (含工资、奖金和补贴等所有收入)? (单选)

S9. Which of the following best represents your family monthly income (including wage, bonus, subsidy, and all other earnings)? (Single choice)

2000 元以下	1
2001-4000 元	2
4001-6000 元	3
6001-8000 元	4
8001-10000 元	5
10001-15000 元	6
15001-20000 元	7
20000 元以上	8

2000 yuan and under	1
2001-4000 yuan	2
4001-6000 yuan	3
6001-8000 yuan	4
8001-10000 yuan	5
10001-15000 yuan	6
15001-20000 yuan	7
20000 yuan and above	8

S10. 您最近三个月内(2014年6月-8月底)购买以下哪些类数码产品? (复选)[选项随机]

S10. What digital products did you purchase over the past three months from Jun., 2014 to the end of Aug., 2014)? (Multiple choice) [Random options]

S11. 您预期未来三个月内(2014年9月-11月底)购买以下哪些类数码产品? (复选)[选项随机]

S11. What digital products do you anticipate to buy over the next three months (from Sep., 2014 to the end of Nov., 2014)? (Multiple choice) [Random options]

	S10	S11
智能手机(可以自己下载安装软件)	1	1
掌上游戏设备(如 PSP, NDSL)	2	2
MP4 等不能上网的视频播放器	3	3
专业车载导航仪	4	4
台式电脑	5	5
笔记本电脑	6	6
上网本(较为小巧轻薄配置较低的笔记本)	7	7
电子阅读器	8	8
平板电脑	9	9
全都没有使用过	10	10

注: S11 未选择“智能手机”终止访问

	S10	S11
Smart phone (able to download and install software personally)	1	1
Handheld game device (like PSP and NDSL)	2	2
Mp4 and other video players that can't connect to the internet	3	3
Professional vehicular navigator	4	4
Desktop computer	5	5
Laptop	6	6
Netbook (small and thin but low-profile laptop)	7	7
Electronic reading	8	8
Tablet computer	9	9
Have not used the above all	10	10

Attention: terminate the questionnaire if “smart phone” is not selected in S11.

S12. 您预期未来三个月内(2014年9月-11月底)将会通过哪些购买渠道来购买智能手机? (复选)

S12. What purchase channels will you choose to buy smart phones over the next three months (from Sep., 2014 to the end of Nov., 2014)? (Multiple choice)

品牌专卖店(苹果专卖店)	1
大卖场/大超市(沃尔玛/家乐福)	2
专门电器大卖场(苏宁/国美)	3
电脑专卖店(太平洋数码广场)	4
网上购买	5
其他	6

Brand monopolized shop (e.g. apple store)	1
Shopping mall/ hypermarket (e.g. Wal-Mart/ Carrefour)	2
Specialized appliance hypermarket (Suning/ Gome)	3
Computer store (e.g. the Pacific Digital Plaza)	4
On-line shopping	5
Others	6

S13. 您预期未来三个月内(2014年9月-11月底)最有可能购买哪些品牌的智能手机? (复选)[选项随机]

S13. Which mobile brands of the following will you be most likely to buy over the next three months (from Sep., 2014 to the end of Nov., 2014)? (Multiple choice) (Random options)

Nokia/诺基亚	1
Samsung/三星	2
Sony Ericsson/索尼爱立信	3
HTC	4
Motorola/摩托罗拉	5
LG	6
Lenovo/联想	7
K-Touch/天语	8
Philips/飞利浦	9
Apple/苹果	10
OPPO	11
Sharp/夏普	12
BBK/步步高	13
ZTE/中兴	14
BlackBerry/黑莓	15
Dopod/多普达	16
Konka/康佳	17
Alcatel/阿尔卡特	18
Newsmy/纽曼	19
Skyworth/创维	20
Haier/海尔	21
Hisense/海信	22
其他(注明____)	23

Nokia	1
Samsung	2
Sony Ericsson	3
HTC	4
Motorola	5
LG	6
Lenovo	7

K-Touch	8
Philips	9
Apple	10
OPPO	11
Sharp	12
BBK	13
ZTE	14
BlackBerry	15
Dopod	16
Konka	17
Alcatel	18
Newsmy	19
Skyworth	20
Haier	21
Hisense	22
Others (indication _____)	23

S14. 您预期未来三个月内(2014年9月-11月底)最有可能购买那个价格范围内的智能手机? (单选)

S14. Which one of the following is your ideal smart phone price range that you are most likely to choose over the next three months (from Sep., 2014 to the end of Nov., 2014)? (Single choice)

1000 以下	1
1000-1999	2
2000-2999	3
3000-3999	4
4000-4999	5
5000-5999	6
6000 以上	7

1000 yuan and under	1
1000-1999 yuan	2
2000-2999 yuan	3
3000-3999 yuan	4
4000-4999 yuan	5
5000-5999 yuan	6
6000 yuan and above	7