



Our Mobile Planet: Italy

Understanding the Mobile Consumer

May 2012



Ipsos OTX MediaCT
The Media, Content and Technology Research Specialists

Executive Summary



Smartphones have become an indispensable part of our daily lives. Smartphone penetration has risen to 28% of the population and these smartphone owners are becoming increasingly reliant on their devices. 47% access the Internet every day on their smartphone and most never leave home without it. **Implication:** Businesses that make mobile a central part of their strategy will benefit from the opportunity to engage the new constantly connected consumer.



Smartphones have transformed consumer behavior. Mobile search, video, app usage, and social networking are prolific. Smartphone users are multi-tasking their media with 63% using their phone while doing other things such as watching TV (33%). **Implication:** Extending advertising strategies to include mobile and developing integrated cross-media campaigns can more effectively reach today's consumers.



Smartphones help users navigate the world. Appearing on smartphones is critical for local businesses. 90% of smartphone users look for local information on their phone and 86% take action a result, such as making a purchase or contacting the business. **Implication:** Ensuring that clickable phone numbers appear in local results and leveraging location based services on mobile make it easy for consumers to connect directly with businesses.



Smartphones have changed the way consumers shop. Smartphones are critical shopping tools with 82% having researched a product or service on their device. Smartphone research influences buyer decisions and purchases across channels. 25% of smartphone users have made a purchase on their phone. **Implication:** Having a mobile optimized site is critical and a cross-channel strategy is needed to engage consumers across the multiple paths to purchase.



Smartphones help advertisers connect with consumers. Mobile ads are noticed by 86% of smartphone users. Smartphones are also a critical component of traditional advertising as 62% have performed a search on their smartphone after seeing an offline ad. **Implication:** Making mobile ads a part of an integrated marketing strategy can drive greater consumer engagement.

Understanding the Mobile Consumer

This survey is designed to gain insights into how consumers use the Internet on their smartphones

In detail:

- Facts and figures about smartphone adoption and usage
- Internet usage in general, search, video, social networking, mobile advertising and m-commerce behavior via smartphones
- This country report is part of a global smartphone study conducted in multiple countries. Visit OurMobilePlanet.com for access to additional tools and data



How are smartphones used in **daily life**?



How do consumers **multi-task** with their smartphones?



What **activities** are consumers conducting on their smartphones?



What role do smartphones play in the **shopping** process?



How do consumers respond to **ads**, offline and on mobile?

Agenda

- 1** Smartphones are Indispensable to Daily Life

- 2** Smartphones Have Transformed Consumer Behavior

- 3** Smartphones Help Users Navigate the World

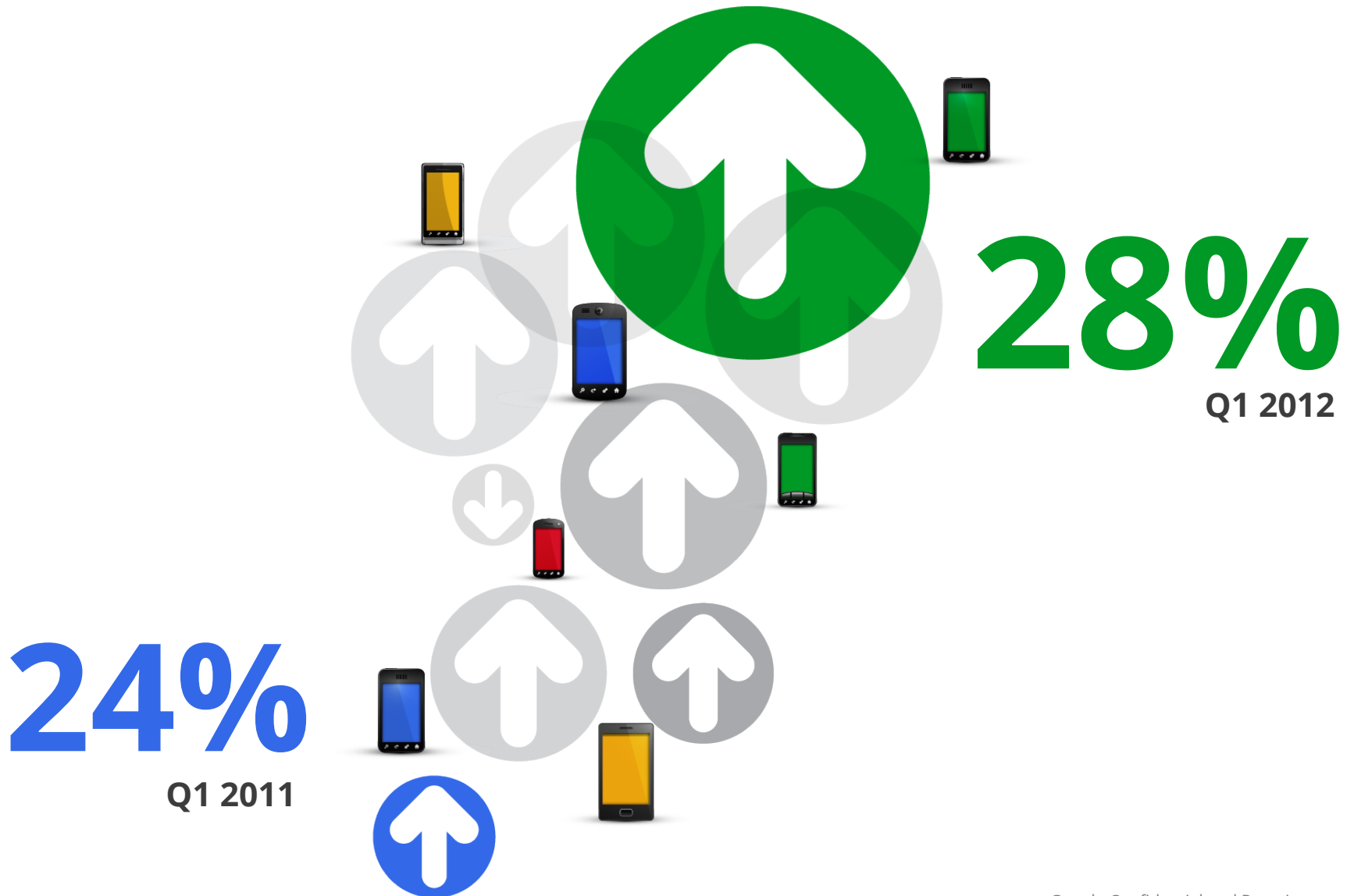
- 4** Smartphones Change the Way Consumers Shop

- 5** Smartphones Help Advertisers Connect with Customers

SMARTPHONES
ARE INDISPENSABLE
TO DAILY LIFE



Smartphone Penetration is on the Rise



Base: National representative population 16+, n= 1.000
Q1: Which if any of the following devices do you currently use?

Smartphones are a Central Part of Our Daily Lives

47%

have used their smartphones every day in the past 7 days

Base: Private smartphone users who use the internet in general, Smartphone n= 1,000
Q18: Thinking about the last seven days on how many days were you online with ...?

Smartphones are Always On, Always with You

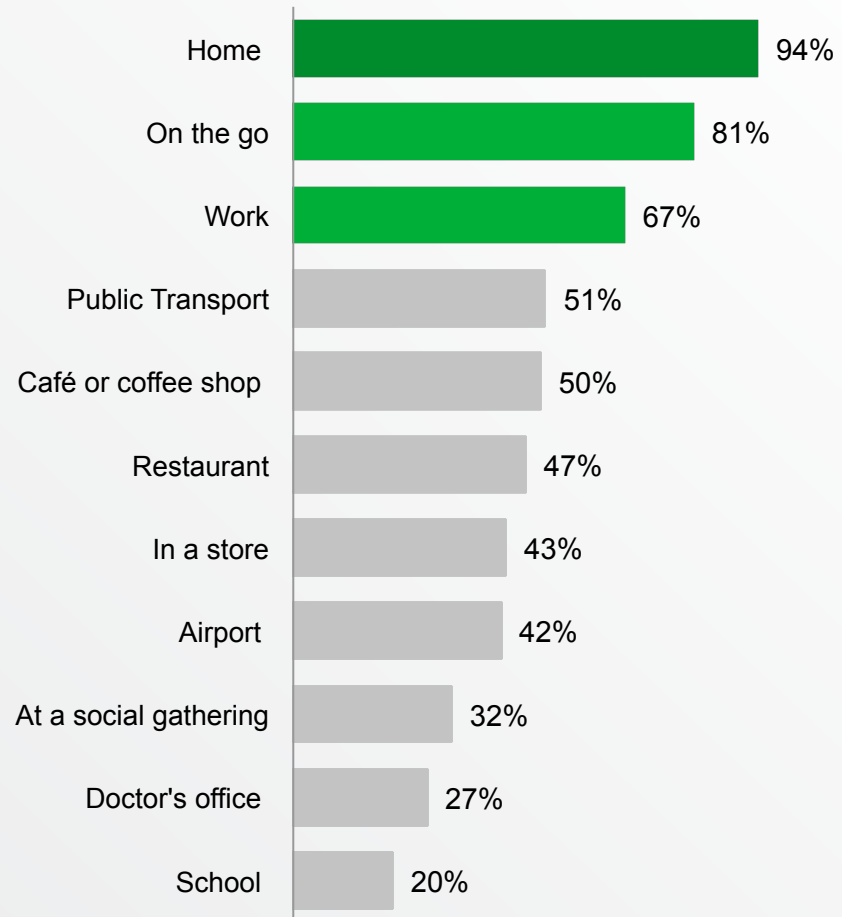
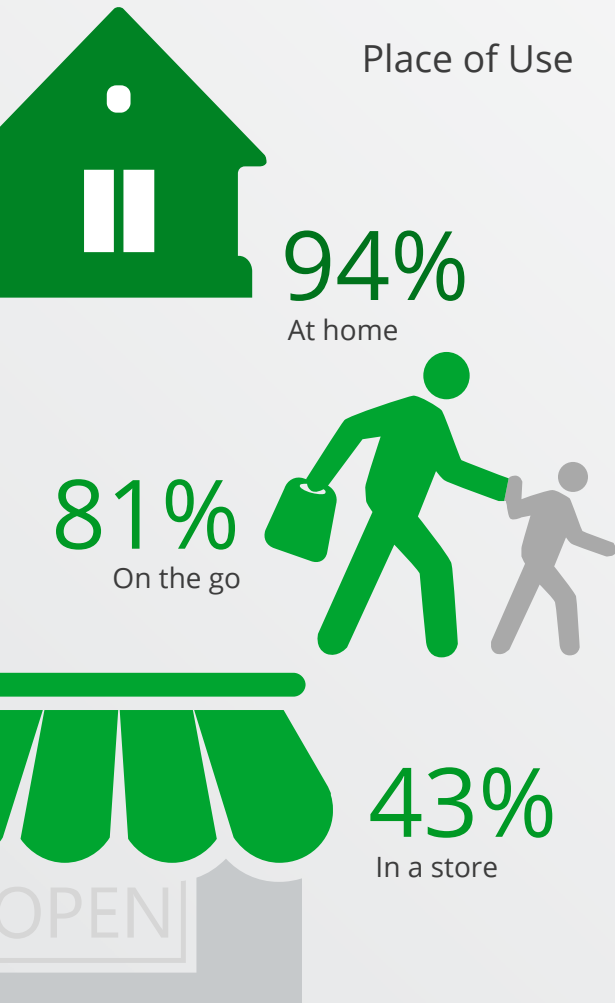


69%
don't leave home
without their device

Base: Private smartphone users who use the internet in general, Smartphone n= 1.000

Q52: To what extent do you agree to each of these statements?, Top2 Boxes; scale from 5 – completely agree to 1 – completely disagree. "I don't leave house without my smartphone"

Smartphones Are Used Everywhere

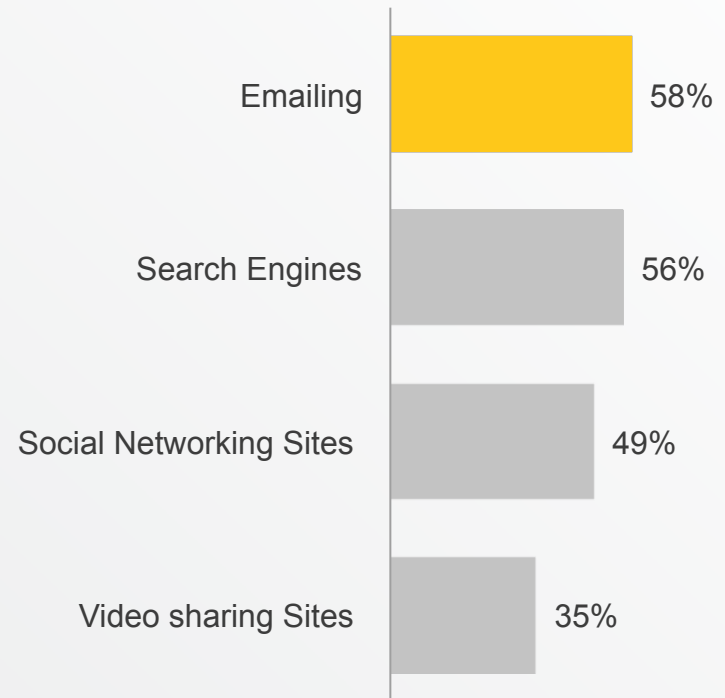


Allowing Users to Stay Fully Connected



50%

access the Internet on their smartphones at least once a day



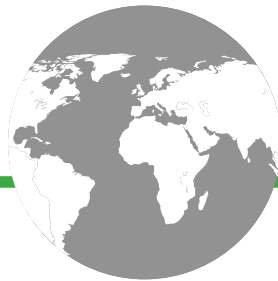
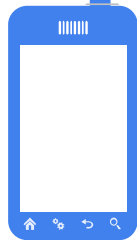
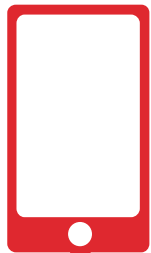
Base: Private smartphone users who use the internet in general, Smartphone n= 1.000

Q9: Using the scale below, please indicate approximately how frequently you use the Internet in general and specific services and types of websites through your browser or apps on your smartphone? Responses reflect at least once a day.

Smartphone Use is Expected to Increase

31%

expect to use their smartphone more to access the Internet in the future



Smartphones Have Become so Important to Consumers that ...

31%

would rather give up
TV than their smartphone



Base: Private smartphone users who use the internet in general, Smartphone n= 1,000
Q52: To what extent do you agree to each of these statements?, Top2 Boxes; scale from 5 - completely agree to 1 - completely disagree. I would rather give up TV than my smartphone, "I would rather give up my TV / desktop PC than my smartphone"

SMARTPHONES
HAVE TRANSFORMED
CONSUMER BEHAVIOR



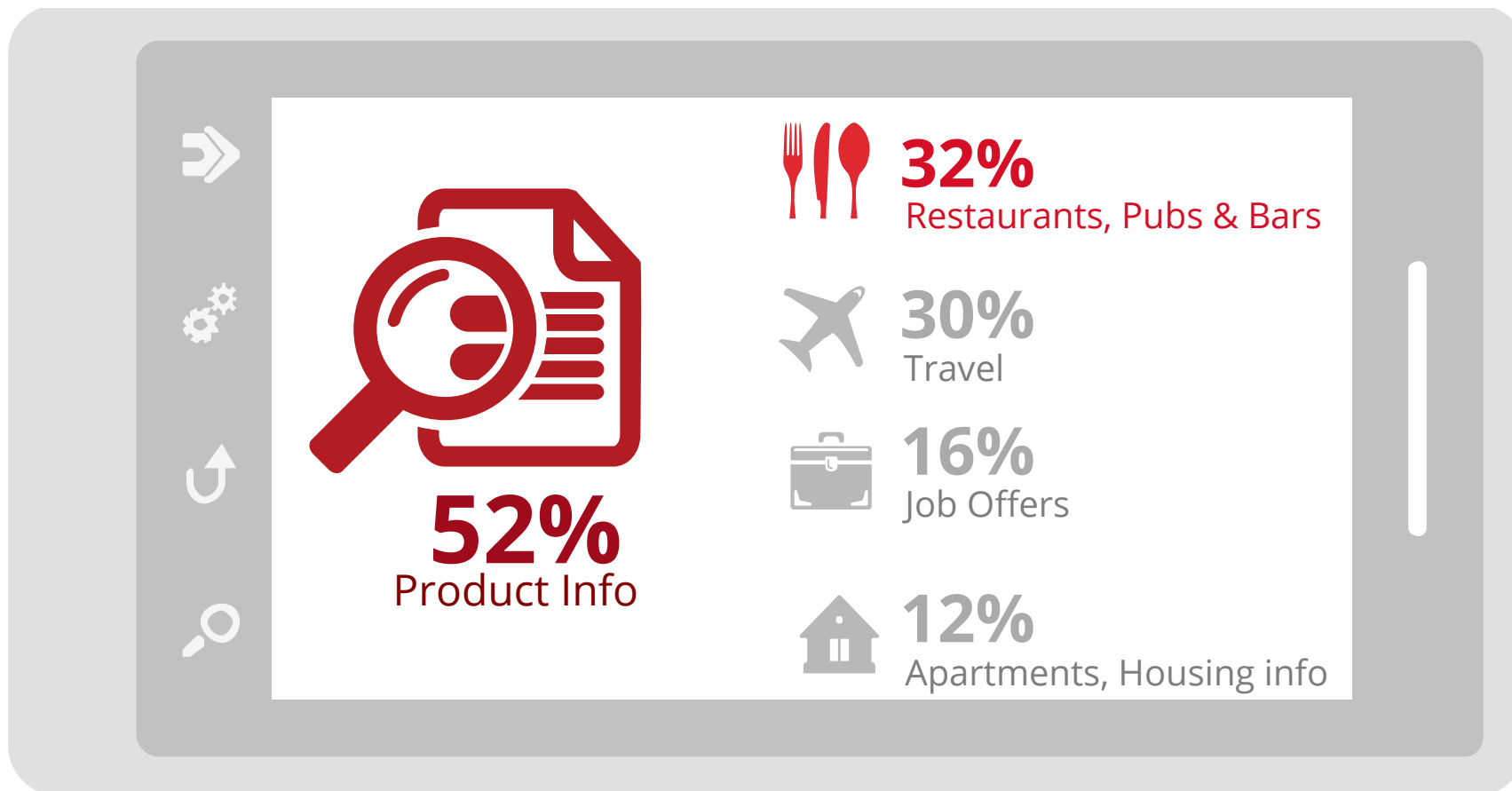
Smartphones are a Major Access Point for Search

47%

search on their smartphones
every day



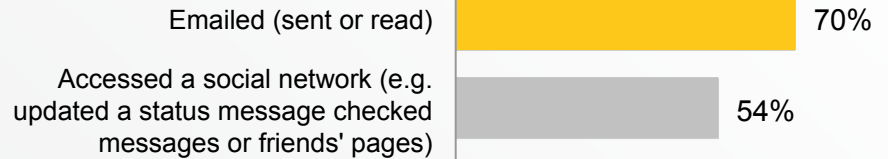
Smartphones Inform Our Daily Life



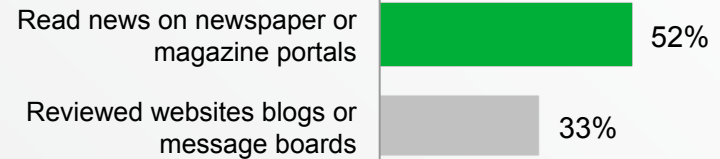
Smartphones are a Multi-Activity Portal



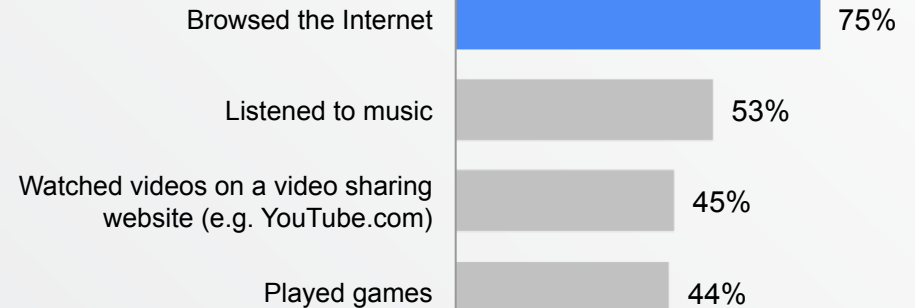
78%
Communication



61%
Stay Informed



87%
Entertainment



App Usage is Ubiquitous



21

apps installed
on average

8

apps used in the
last 30 days

4

paid apps installed
on average

Base: Private smartphone users who use the internet in general, Smartphone n= 1.000

Q24: How many apps do you currently have on your smartphone?

Base: Private smartphone users who use the internet in general and who have at minimum one app on their smartphone, n= 973

Q25: And of the apps you currently have installed on your smartphone, how many have you used actively in the last 30 days?

Q26: And of the apps you currently have installed on your smartphone, how many have you purchased for a certain amount in an app store?

Smartphones Users are Avid Video Watchers



76%

watch video

18%

use video at least
once a day

Base: Private smartphone users who use the internet in general, Smartphone n= 1.000
Q35: How often do you watch videos via websites or apps (e.g. short video clips, videos of TV shows, TV movies online, etc.) on your ... ?

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Smartphone Users are Frequent Social Networkers

75%

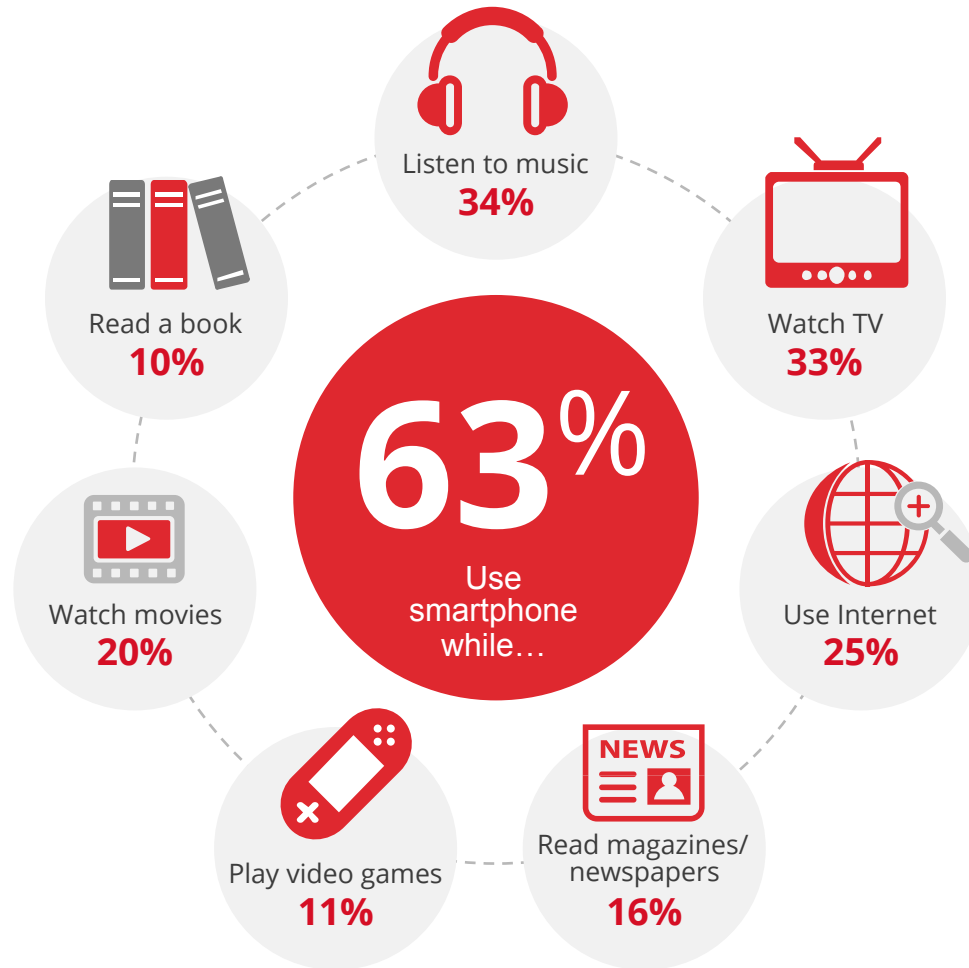
visit social networks

41%

visit at least once a day

Base: Private smartphone users who use the internet in general, Smartphone n= 1.000 . Q38: How often do you visit a social network (via websites or apps) on your ... ?

Smartphones Are Used While Multi-tasking with Other Media



SMARTPHONES
HELP USERS
**NAVIGATE THE WORLD
AROUND THEM**



Looking for Local Information is a Frequent Smartphone Activity



56%

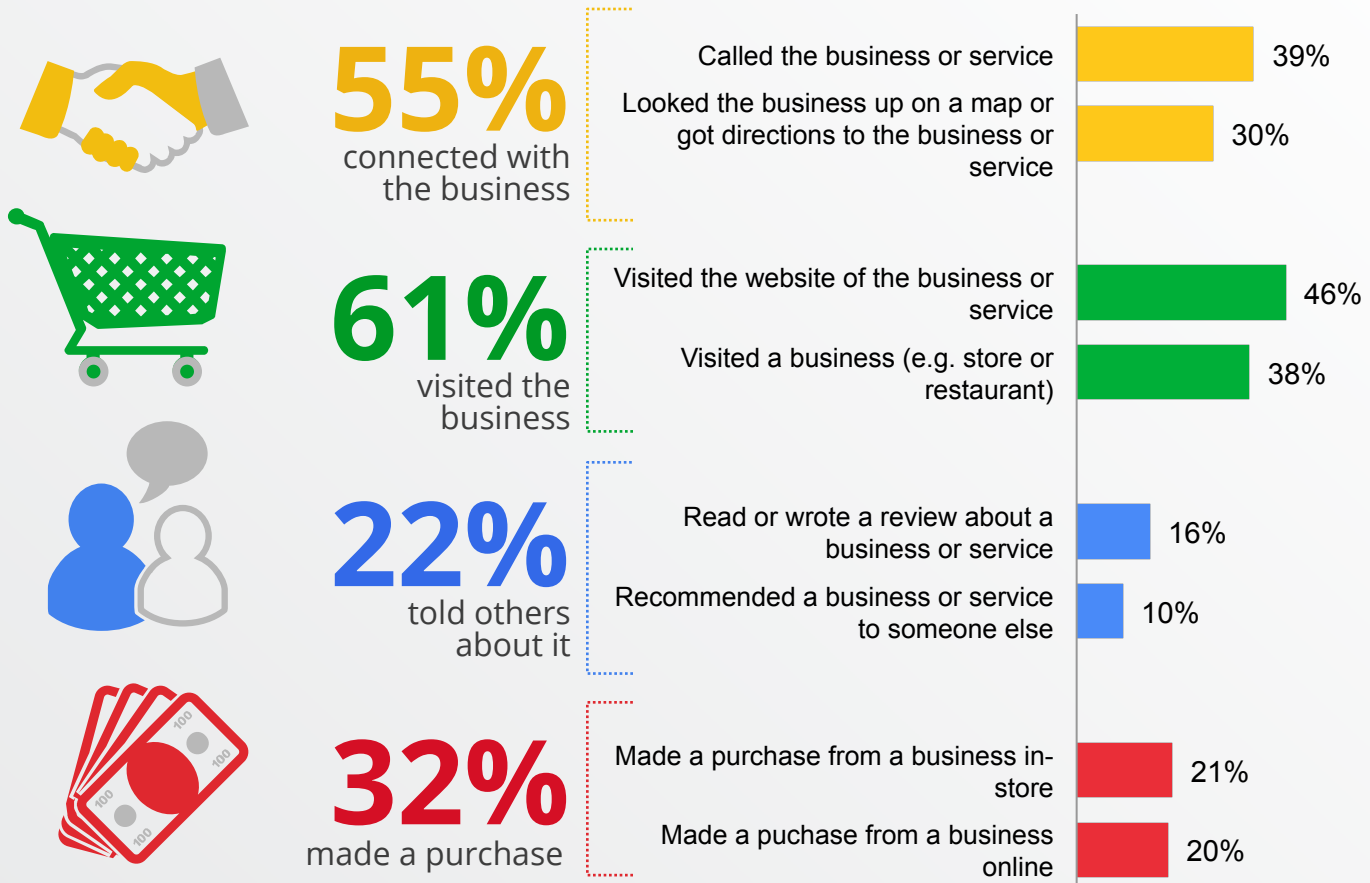
Look for local information at least **once a week**



22%

Look for local information **daily**

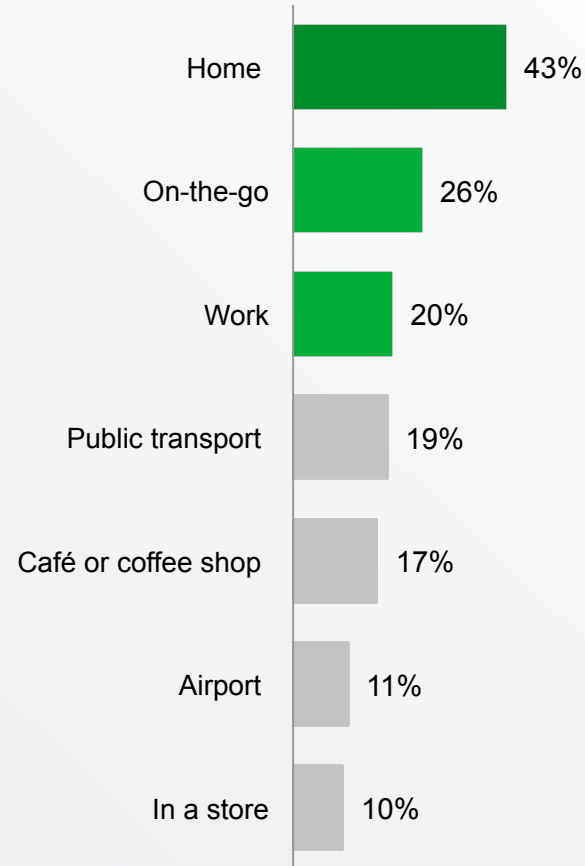
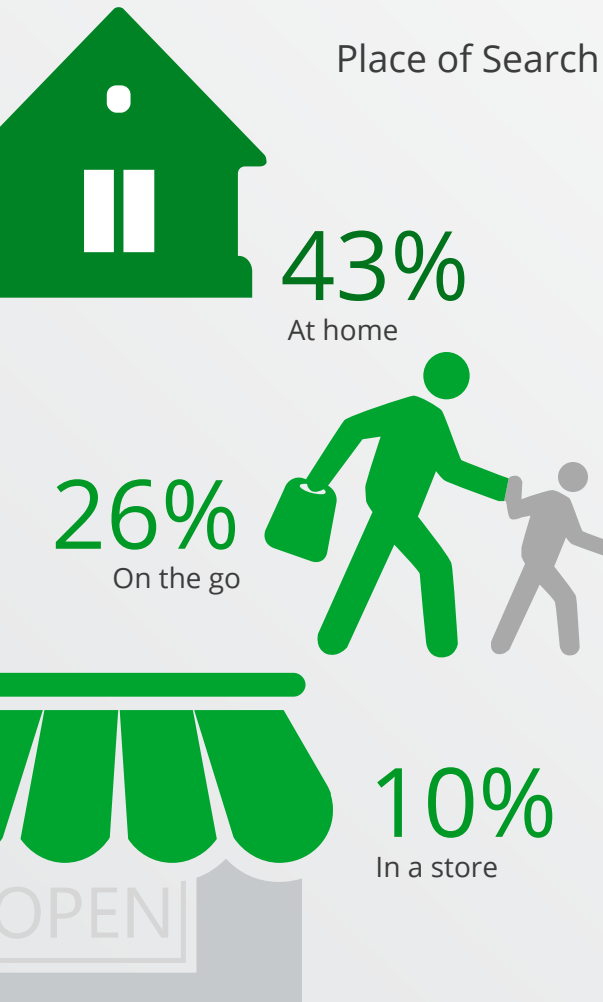
Local Information Seekers Take Action



SMARTPHONES
CHANGE THE WAY
CONSUMERS SHOP



Smartphones Allow Users to Research Products Anytime, Anywhere



82%

have researched
a product or service
on their phone



Smartphones are Our Primary Shopping Companions

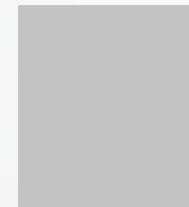


I intentionally have my smartphone with me **to compare prices and inform myself about products.**



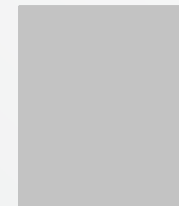
27%

I have changed my mind about purchasing a product or service in store as of a result of information I gathered using my smartphone.



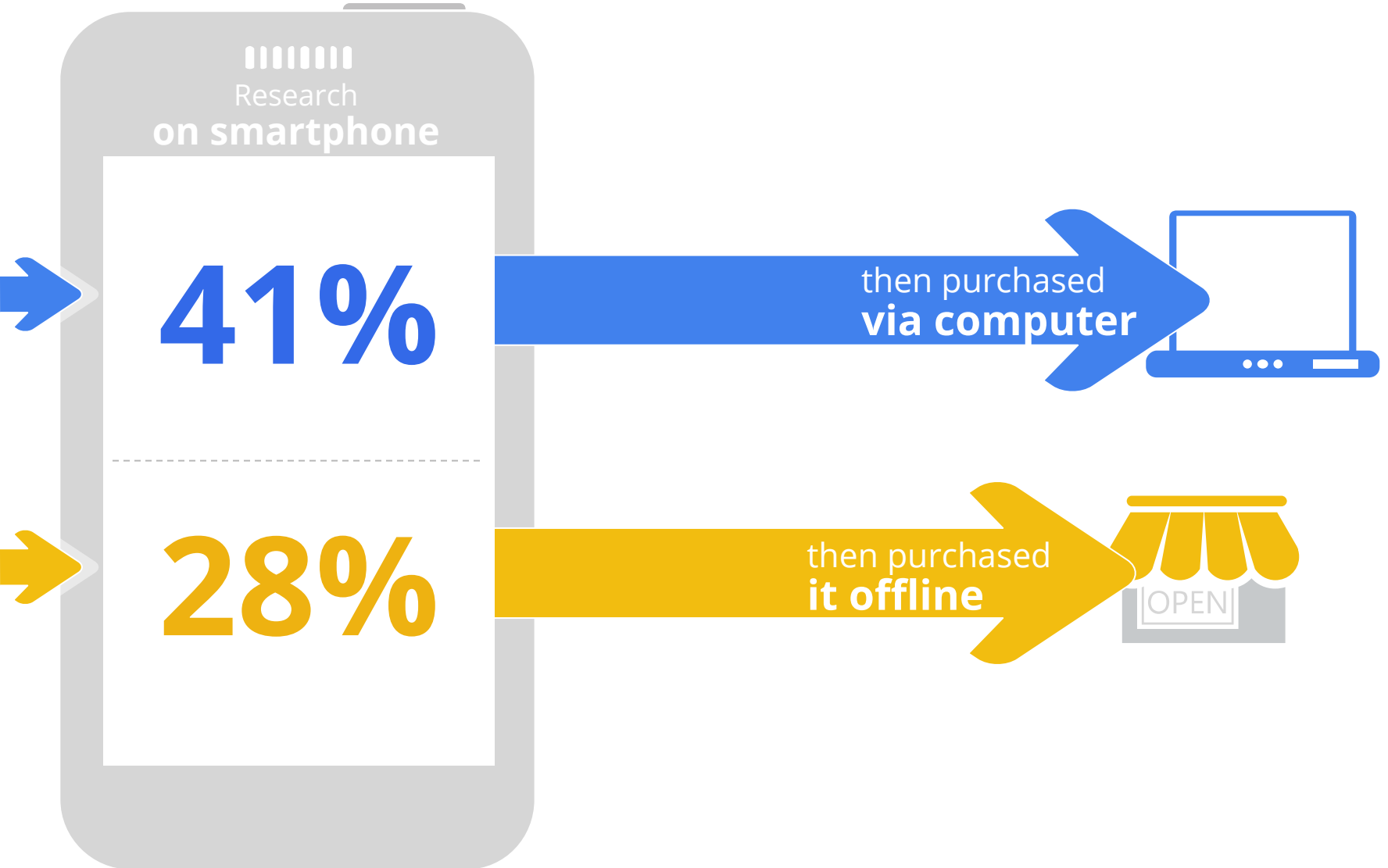
22%

I have changed my mind about purchasing a product or service online as of a result of information I gathered using my smartphone.



21%

Research that Starts on Smartphones Leads to Purchases Across Channels



Base: Private smartphone users who use the internet in general, Smartphone n= 1.000

Q48: Listed below are various products or services. For each of these products or services please indicate which statement applies to you.

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Smartphones Are an Emerging Point of Purchase



25%

of smartphone users have purchased a product or service on their smartphone

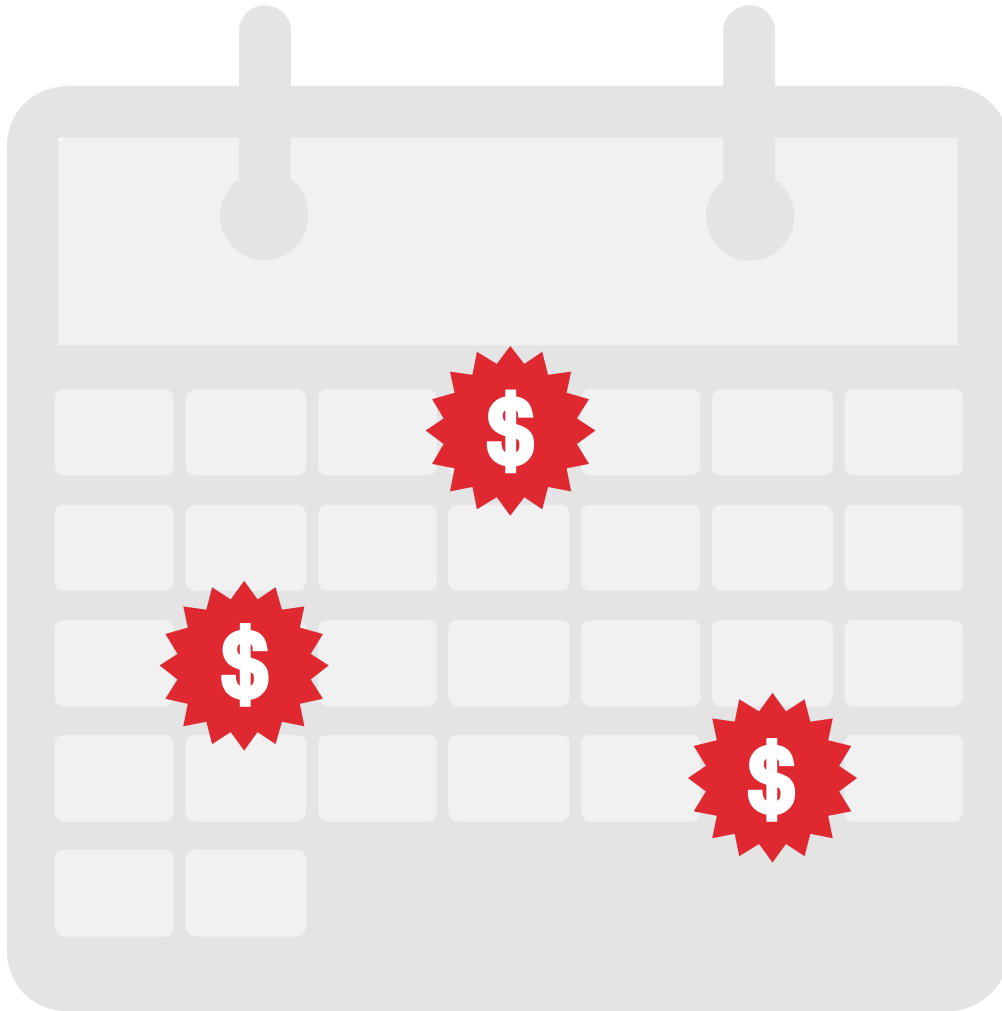
63%

of these smartphone shoppers have made a purchase in the past month

Base: Private smartphone users who use the internet in general, Smartphone n= 1,000
Q44: Have you ever purchased a product or service over the internet on your smartphone? With product or service we mean everything you can buy excluding apps. Base: Private smartphone users who use the internet in general and who purchased via internet on their smartphone n= 255
Q45: Have you made a purchase by using your smartphone in the past month?

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Smartphones Shoppers are Frequent Buyers



59%

make mobile purchases
at least once a month

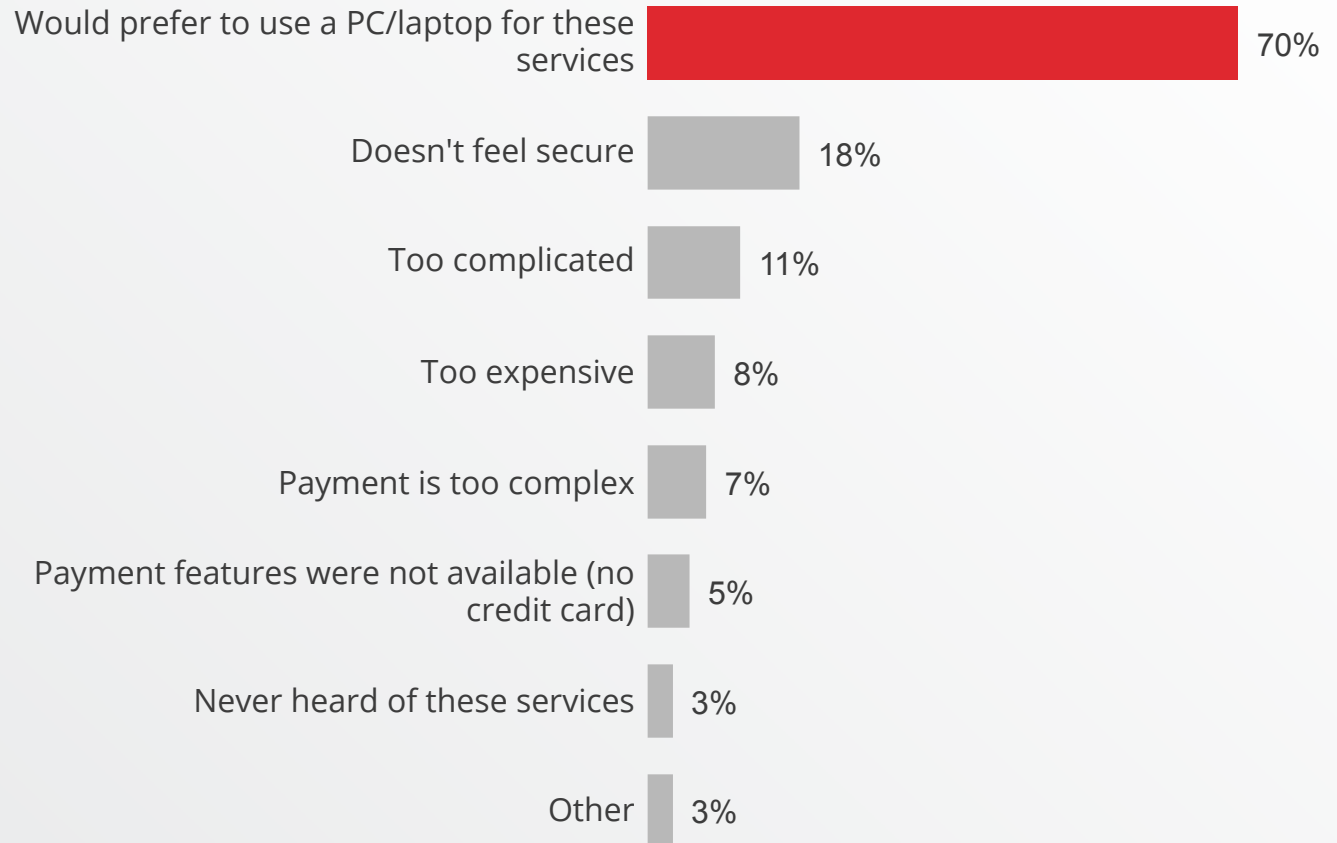
Mobile Commerce will Continue to Grow



26%

expect to make **more mobile purchases** in the future

Barriers to Mobile Commerce Still Exist

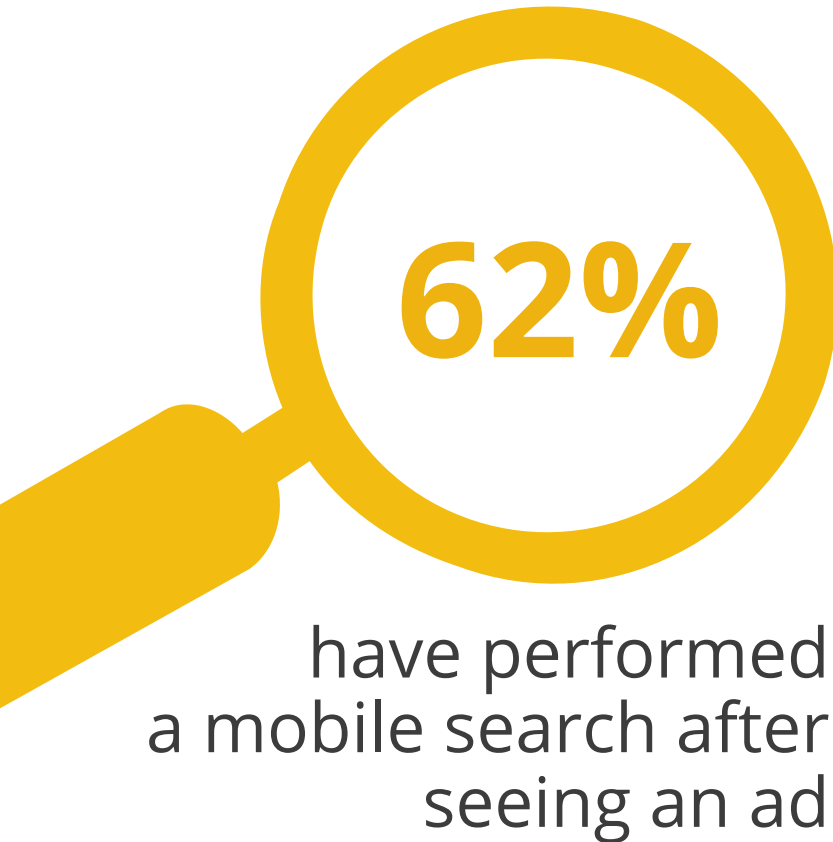


SMARTPHONES
HELP ADVERTISERS
**CONNECT WITH THEIR
CUSTOMERS**



Offline Ad Exposure Leads to Mobile Search

Ad location



TV
55%



Shop/business
54%



Magazines
51%



Posters / Billboards
50%

The First Page of Mobile Search Results is Key

55%

only look at the **first page of results** when conducting a search on their smartphone





86%

of smartphone users
notice mobile ads

Base: Private smartphone users who use the internet in general, Smartphone n= 1.000
Q41: How often do you notice advertising when you are using the browser or an app on your smartphone? (Ever)

Mobile Ads Make an Impression

45%

While on a website



30%

While in app



29%

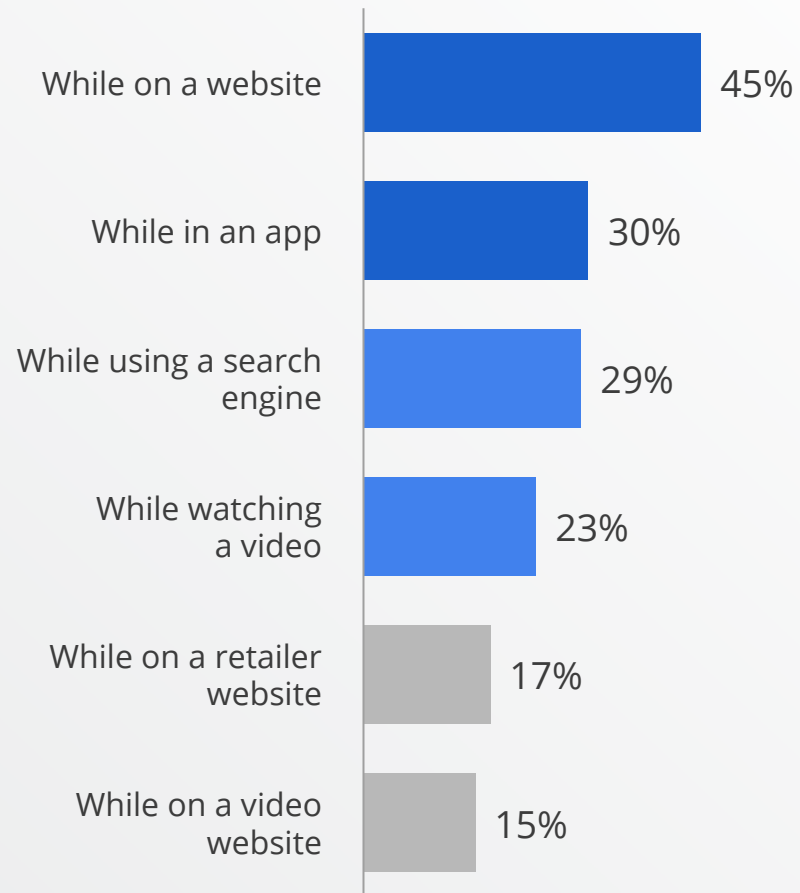
While using a search engine

23%

While watching a video



Where Mobile Ads Are Noticed



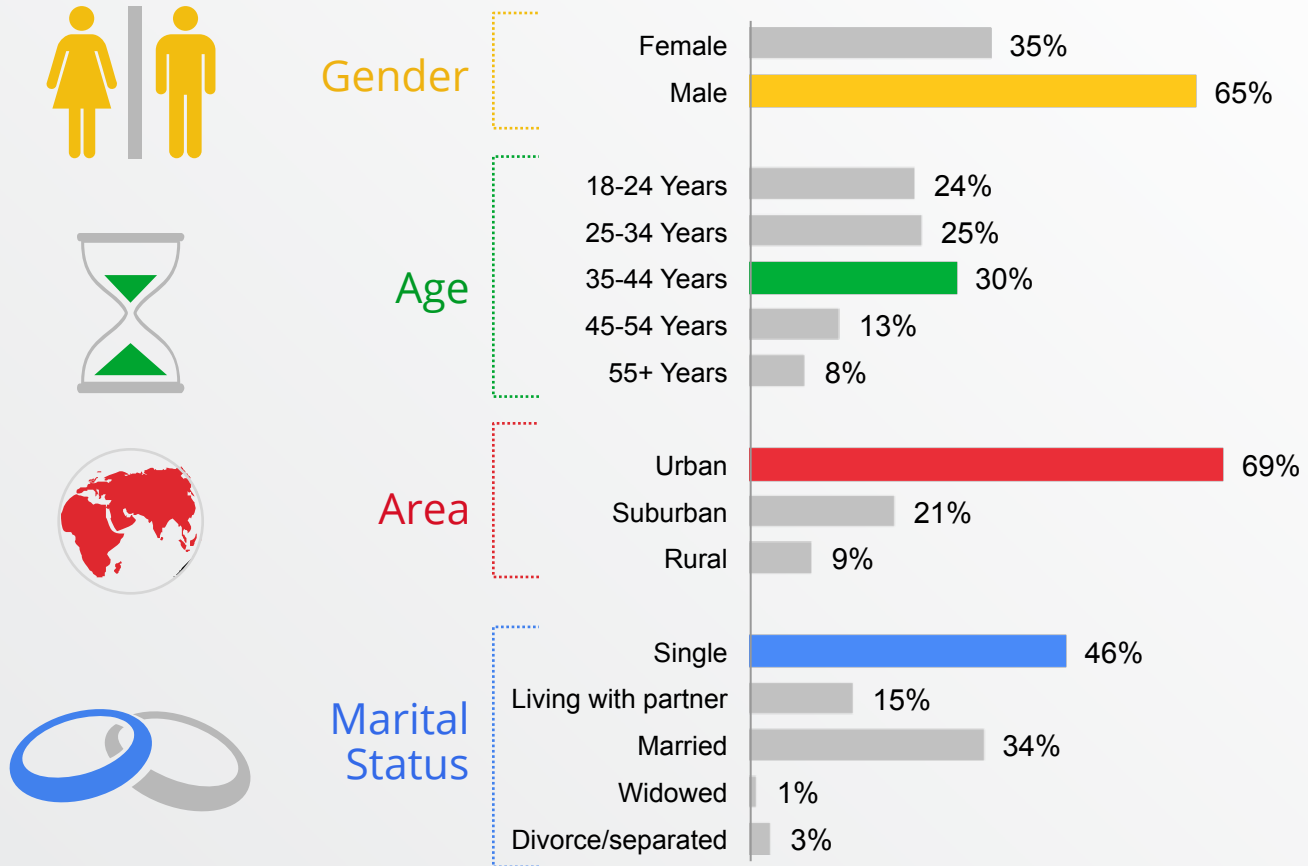
BACKGROUND



Research Methodology

- In partnership with Ipsos MediaCT, we interviewed a total of 1,000 Italian online adults (18-64 years of age) who identified themselves as using a smartphone to access the Internet
- The distribution is according to a national representative CATI Study
- A smartphone is defined as “a mobile phone offering advanced capabilities, often with PC-like functionality or ability to download apps”
- Respondents were asked a variety of questions around device usage, mobile search, video, social, web and commerce behavior and mobile advertising
- Interviews were conducted in Q1 2012

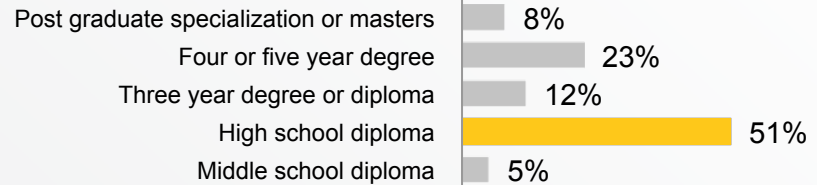
Demographics



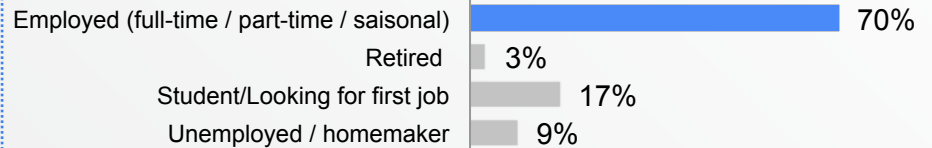
Demographics



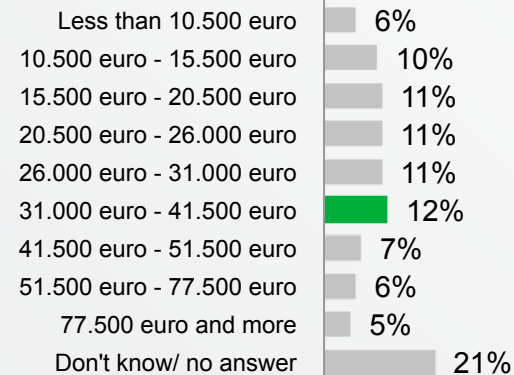
Education



Employment Status



Income



Base: Private smartphone users who use the Internet in general, wave 2, n= 1.000

D4. What is the highest level of education you have completed? D5. Which of the following best describes your employment status? D9. Which of these ranges comes closest to the total (annual) income of your household before anything is deducted for tax National Insurance (Social security) pension schemes etc.?