



Our Mobile Planet: Germany

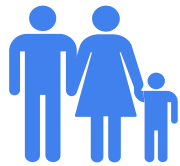
Understanding the Mobile Consumer

May 2013



Ipsos 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 40% of the population and these smartphone owners are becoming increasingly reliant on their devices. 61% access the Internet every day on their smartphone and 67% 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 behaviour. Mobile search, video, app usage and social networking are prolific. Smartphone users are multi-tasking their media with 76% using their phone while doing other things such as watching TV (49%). **Implication:** Extending advertising strategies to include mobile and developing integrated cross-media campaigns can reach today's consumers more effectively.



Smartphones help users navigate the world. Appearing on smartphones is critical for local businesses. 88% of smartphone users look for local information on their phone and 78% take action as 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 that consumers shop. Smartphones are critical shopping tools with 76% of users having researched a product or service on their device. Smartphone research influences buyer decisions and purchases across channels. 32% of smartphone users have made a purchase on their phone. **Implication:** Having a mobile-optimised 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 76% of smartphone users. Smartphones are also a critical component of traditional advertising as 49% 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 behaviour via smartphones
- This country report is part of a global smartphone study conducted in multiple countries. Visit thinkwithgoogle.com/mobileplanet 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?

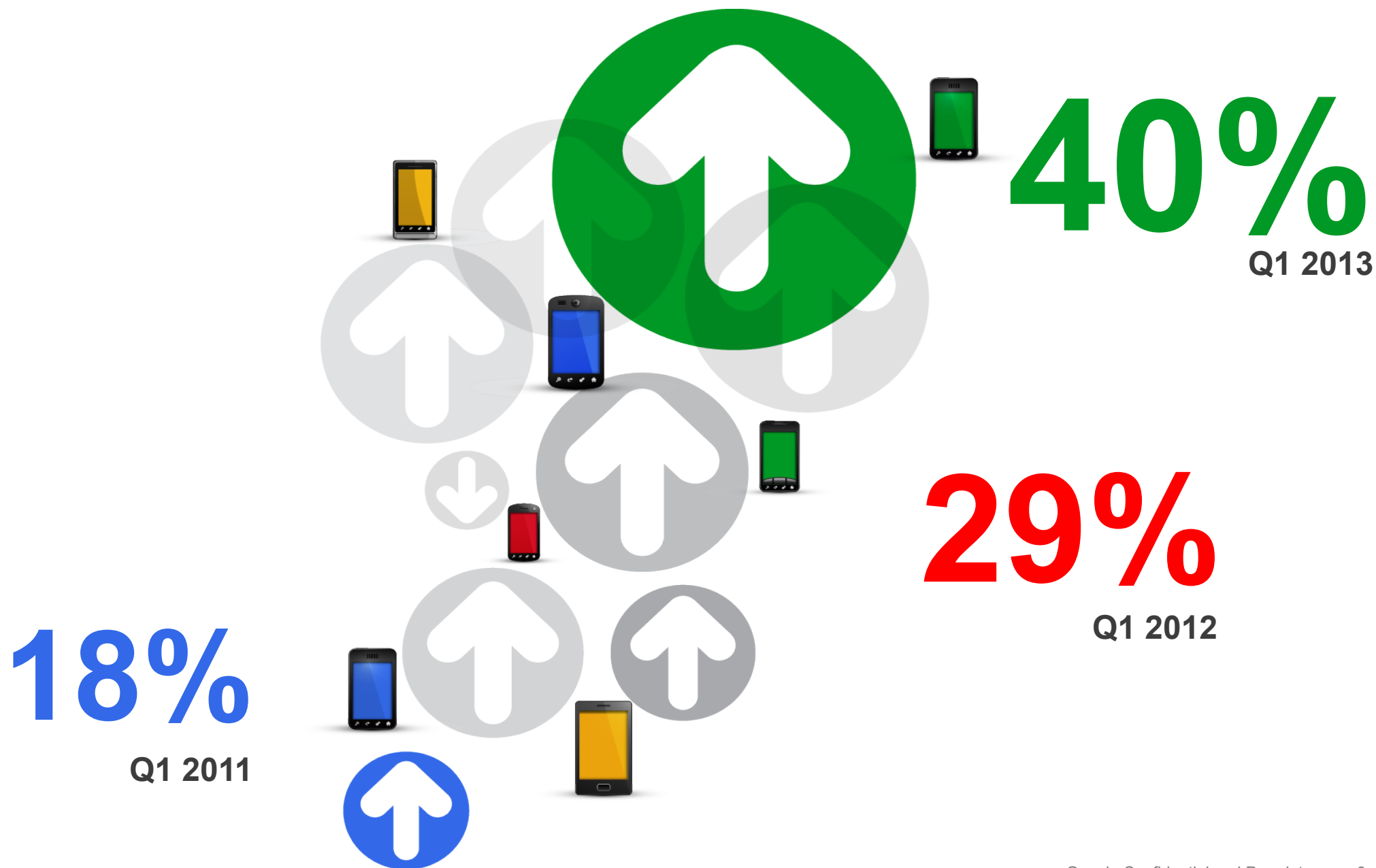
Agenda

- 1** Smartphones are Indispensable to Daily Life
- 2** Smartphones Have Transformed Consumer Behaviour
- 3** Smartphones Help Users Navigate the World
- 4** Smartphones Change the Way that 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

61%

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

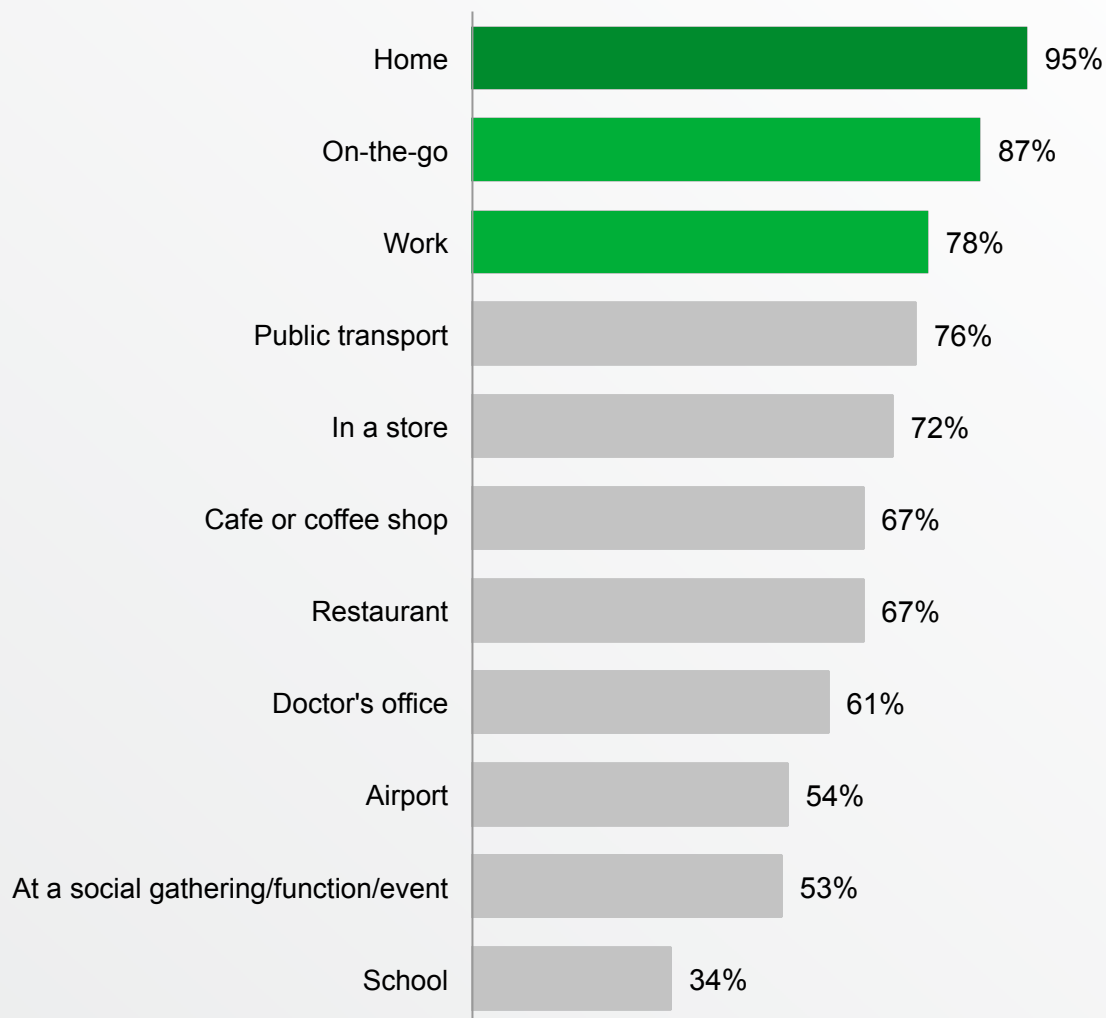


67%
don't leave home without
their device

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"

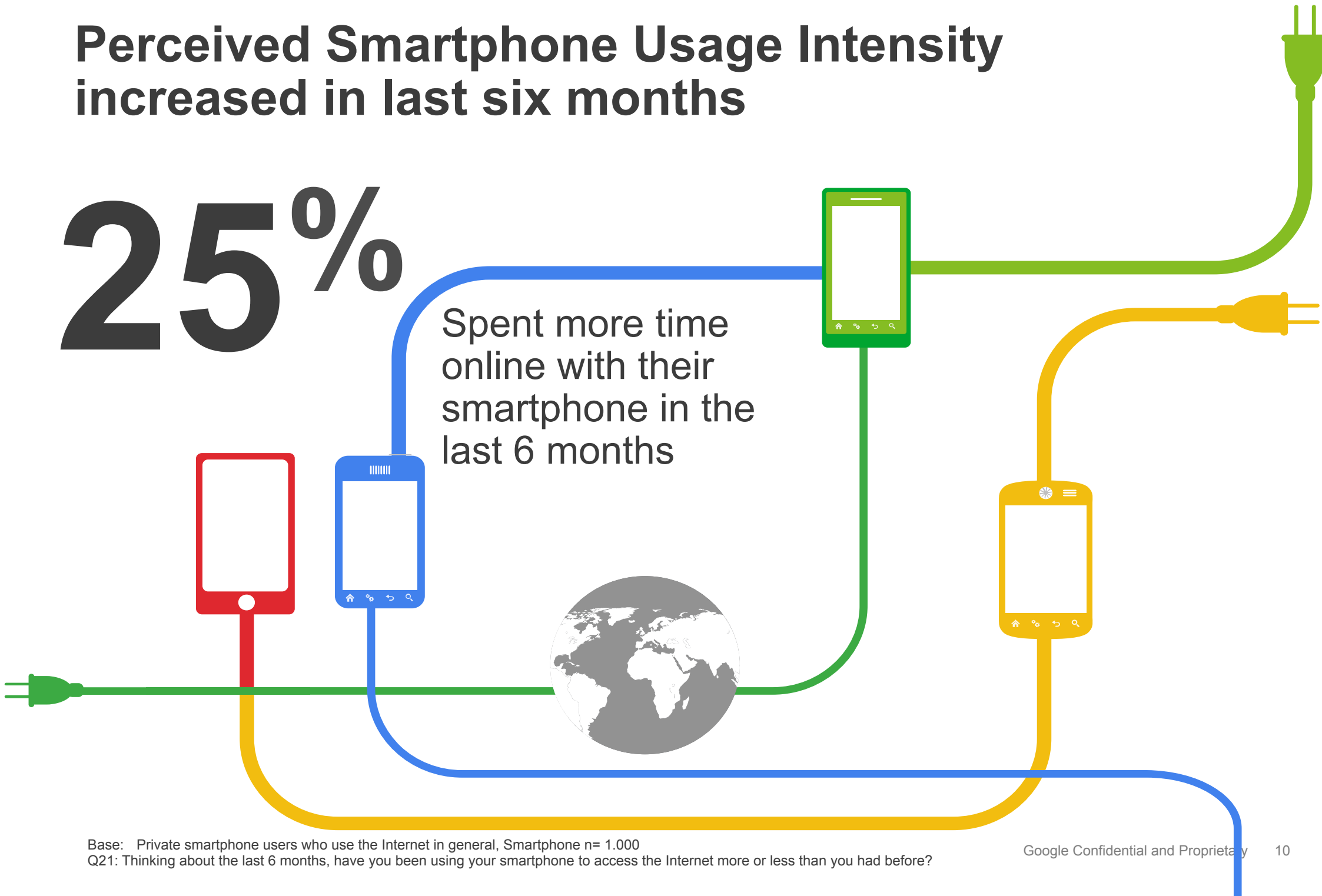
Smartphones Are Used Everywhere



Perceived Smartphone Usage Intensity increased in last six months

25%

Spent more time online with their smartphone in the last 6 months



Base: Private smartphone users who use the Internet in general, Smartphone n= 1,000

Q21: Thinking about the last 6 months, have you been using your smartphone to access the Internet more or less than you had before?

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Smartphones Have Become so Important to Consumers that ...

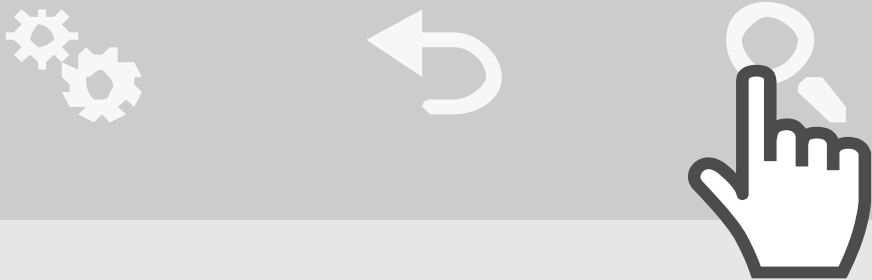
28%
would rather give up
TV than their smartphone



SMARTPHONES HAVE TRANSFORMED **CONSUMER BEHAVIOUR**



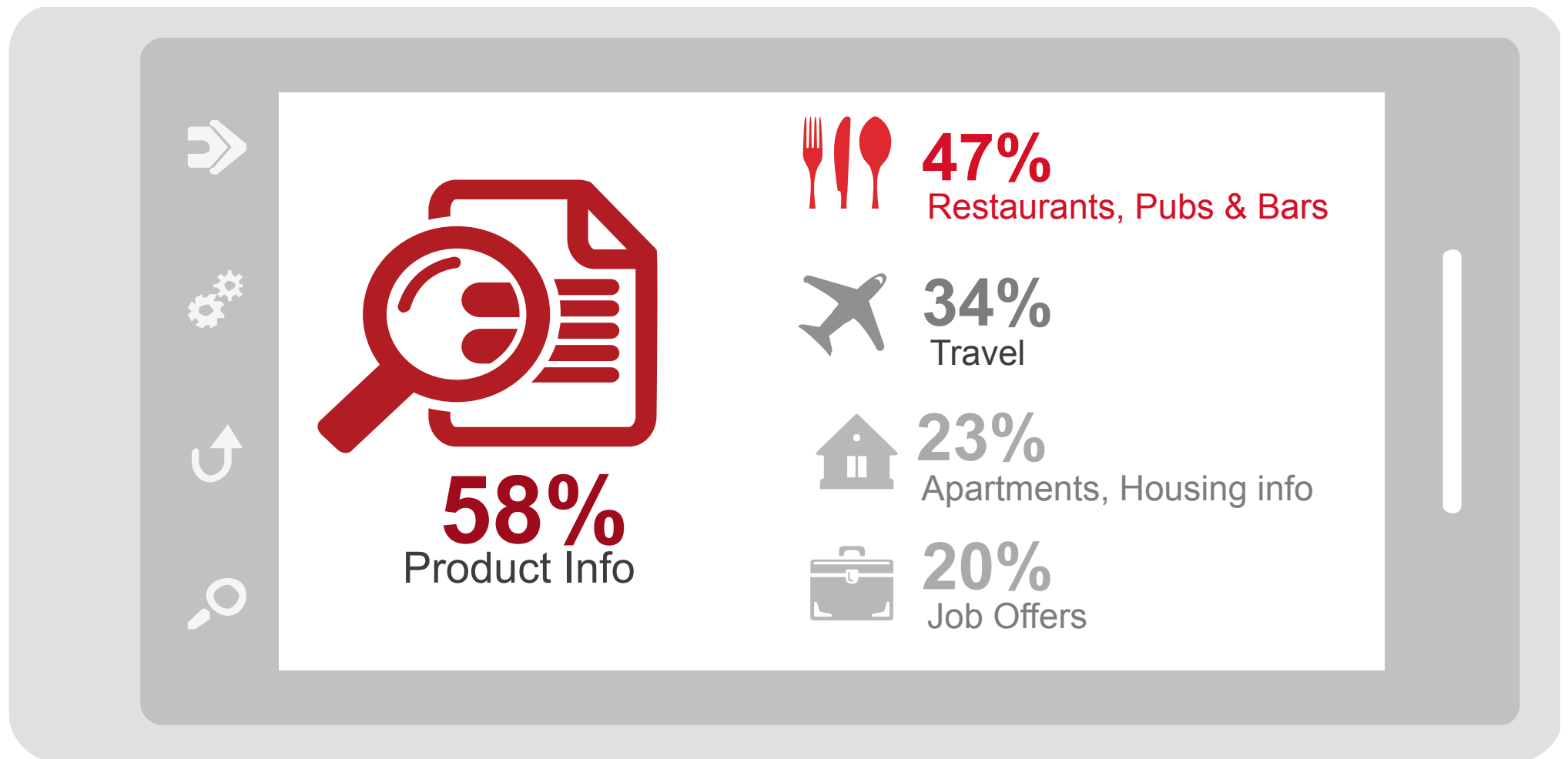
Smartphones are a Major Access Point for Search



38%

search on their
smartphones
every day

Smartphones Inform Our Daily Life



Smartphones are a Multi-Activity Portal



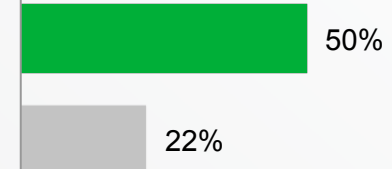
86%
Communication

Emailed (sent or read)
Accessed a social network (e.g. updated a status message, checked messages or friends' pages)



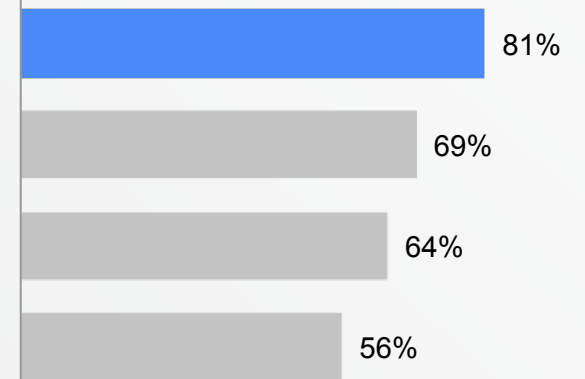
55%
Stay Informed

Read news on newspaper or magazine portals
Reviewed websites blogs or message boards



90%
Entertainment

Browsed the Internet
Listened to music
Played games
Watched videos on a video sharing website (e.g. YouTube.com)



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

Q23: Which of the following activities do you do with your smartphone? Please indicate whether you ever do this at all.

App Usage is Ubiquitous



28

apps installed
on average

11

apps used in the
last 30 days

6

paid apps installed
on average

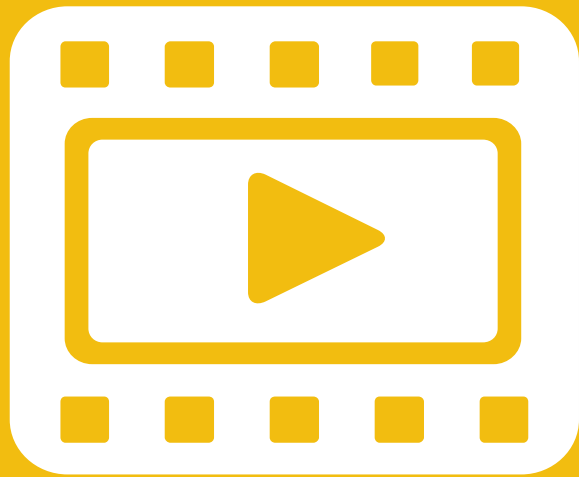
Base: Private smartphone users who use the Internet in general, Smartphone n= 1.000 Q24: How many apps do you currently have on your smartphone?

Base: Private smartphone users who use the Internet in general and who have, at minimum, one app on their smartphone, n= 975

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

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

Smartphones Users are Avid Video Watchers



CLICK TO WATCH VIDEO

71%

watch video

11%

use video at least
once a day

Smartphone Users are Frequent Social Networkers

72%

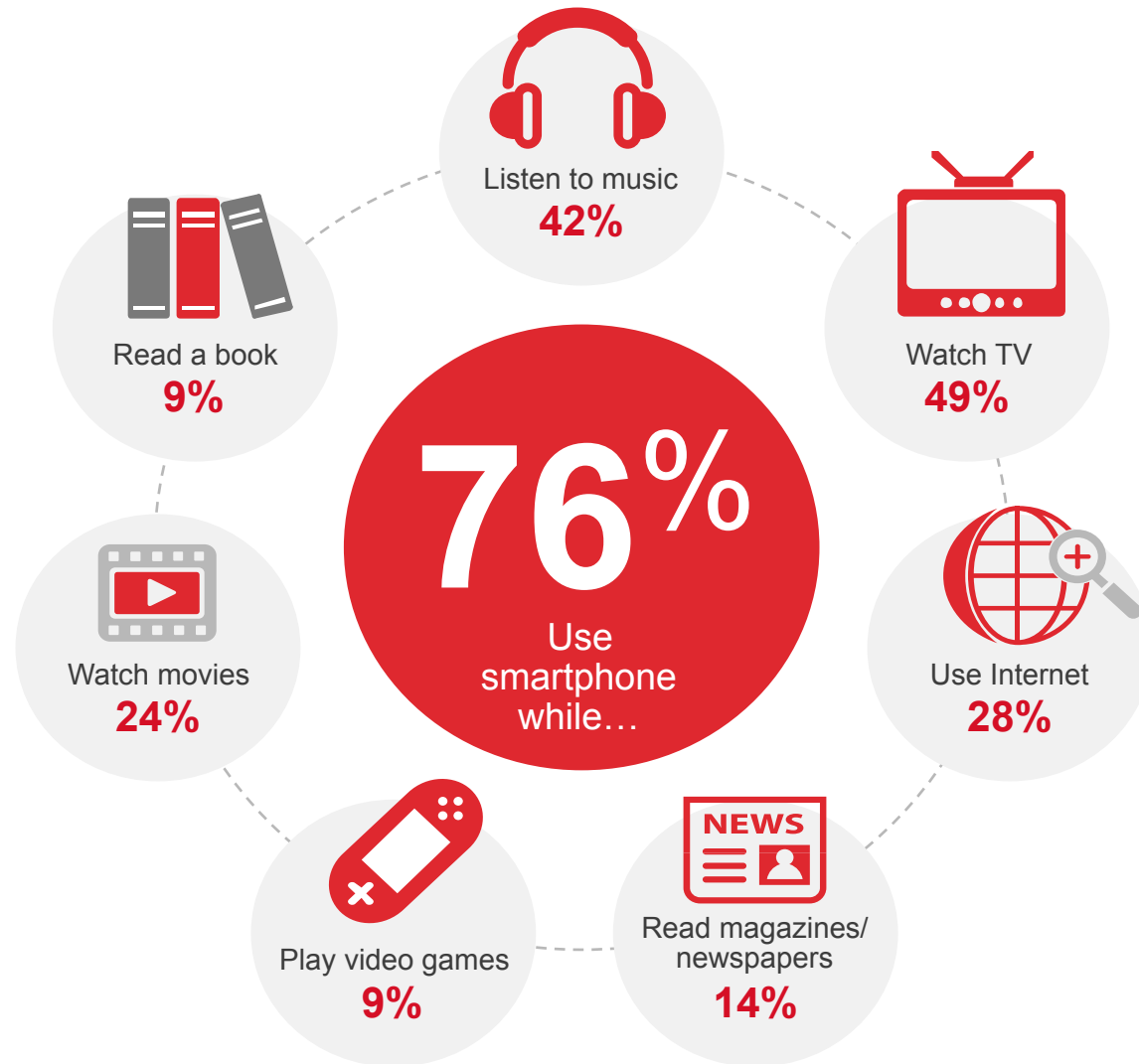
visit social
networks

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 smartphone?

Smartphones Are Used While Multi-tasking with Other Media



SMARTPHONES HELP USERS NAVIGATE THE WORLD AROUND THEM





88%

of smartphone users have
looked for local
information

78%

have taken action as
a result

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

Q33: How often do you look for information about local businesses or services on your smartphone? (Ever)

Base: Private smartphone users who use the Internet in general and who look at least less than once a month for information
their smartphone, Smartphone n= 867

Q34 Which of the following actions have you taken after having looked up this type of information (business or services close to your
location)?

on

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Looking for Local Information is a Frequent Smartphone Activity



44%

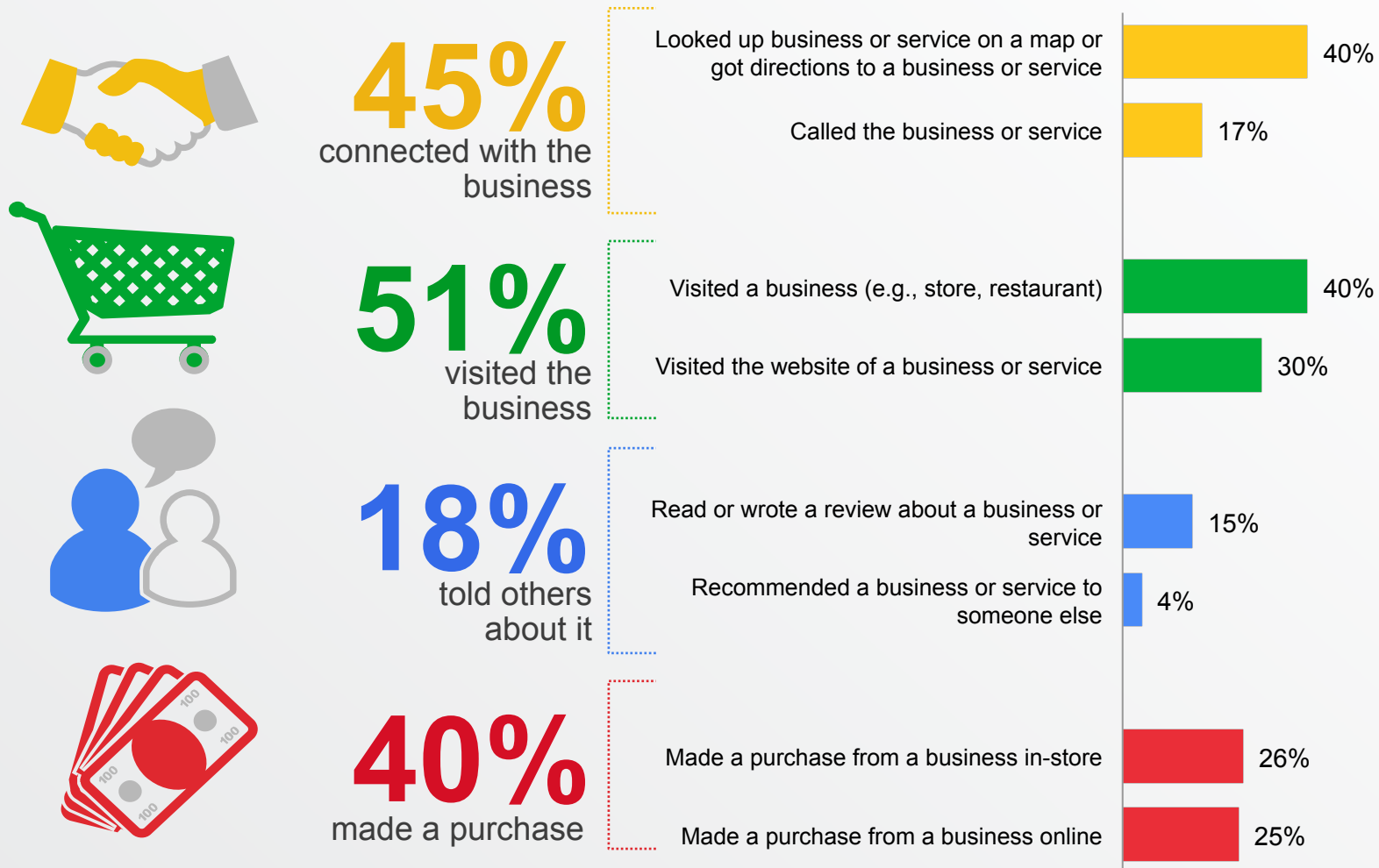
Look for local information
at least **once a week**



16%

Look for local information
daily

Local Information Seekers Take Action



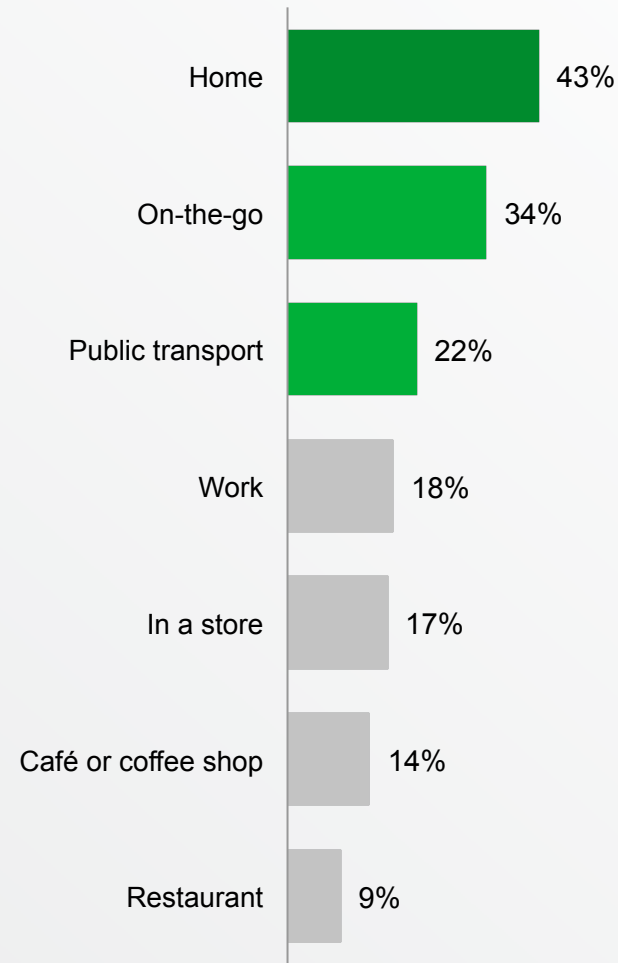
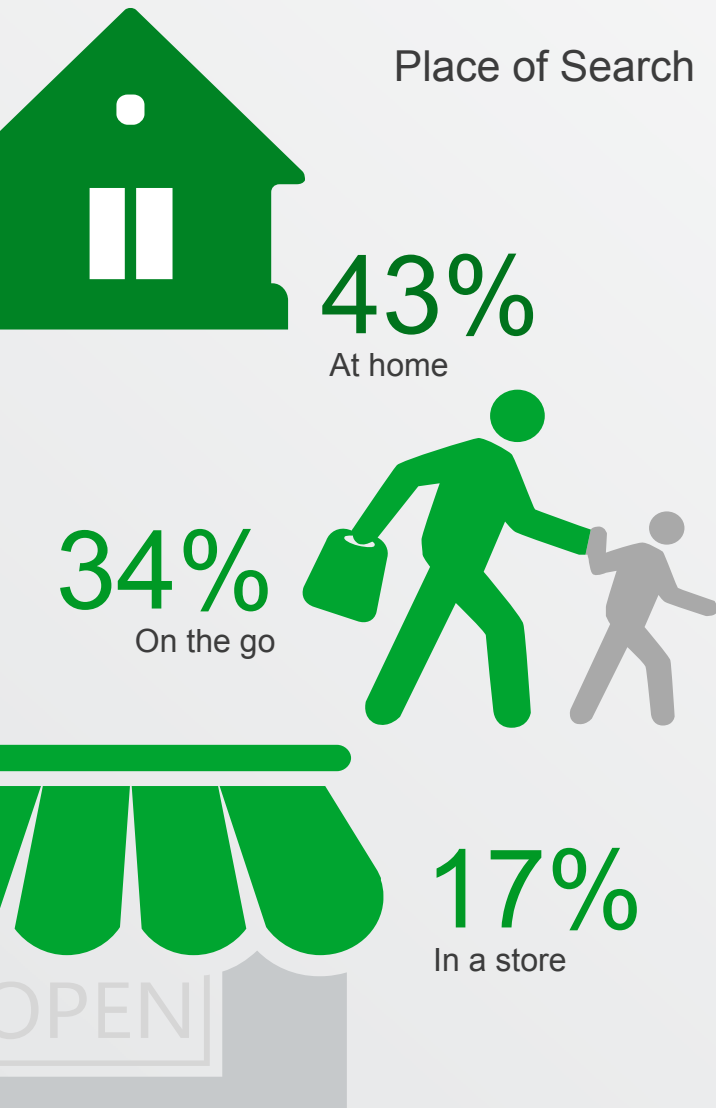
Base: Private smartphone users who use the Internet in general and who look at least less than once a month for information on their smartphone, Smartphone n= 879

Q34: Which of the following actions have you taken after having looked up this type of information (business or services close to your location)?

SMARTPHONES
CHANGE THE WAY THAT
CONSUMERS SHOP

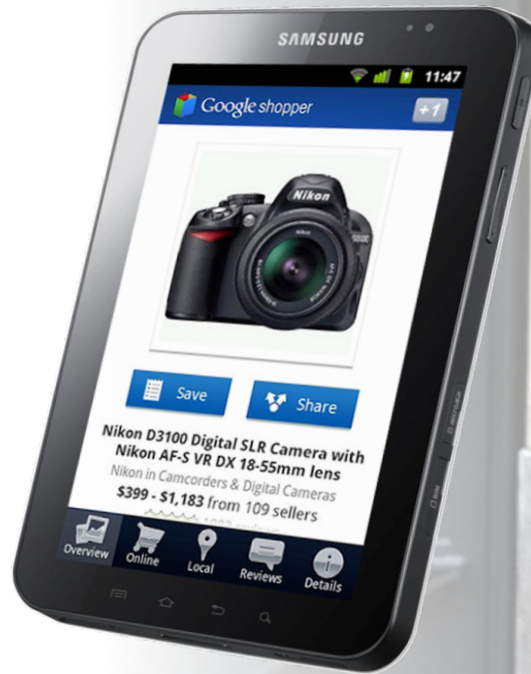


Smartphones Allow Users to Research Products Anytime, Anywhere



76%

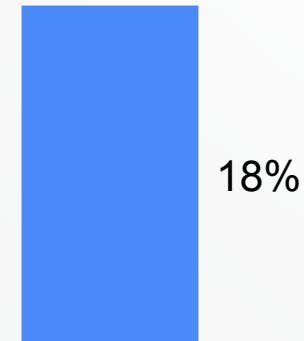
have researched
a product or service
on their phone



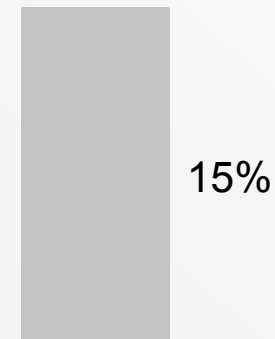
Smartphones are Our Primary Shopping Companions



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



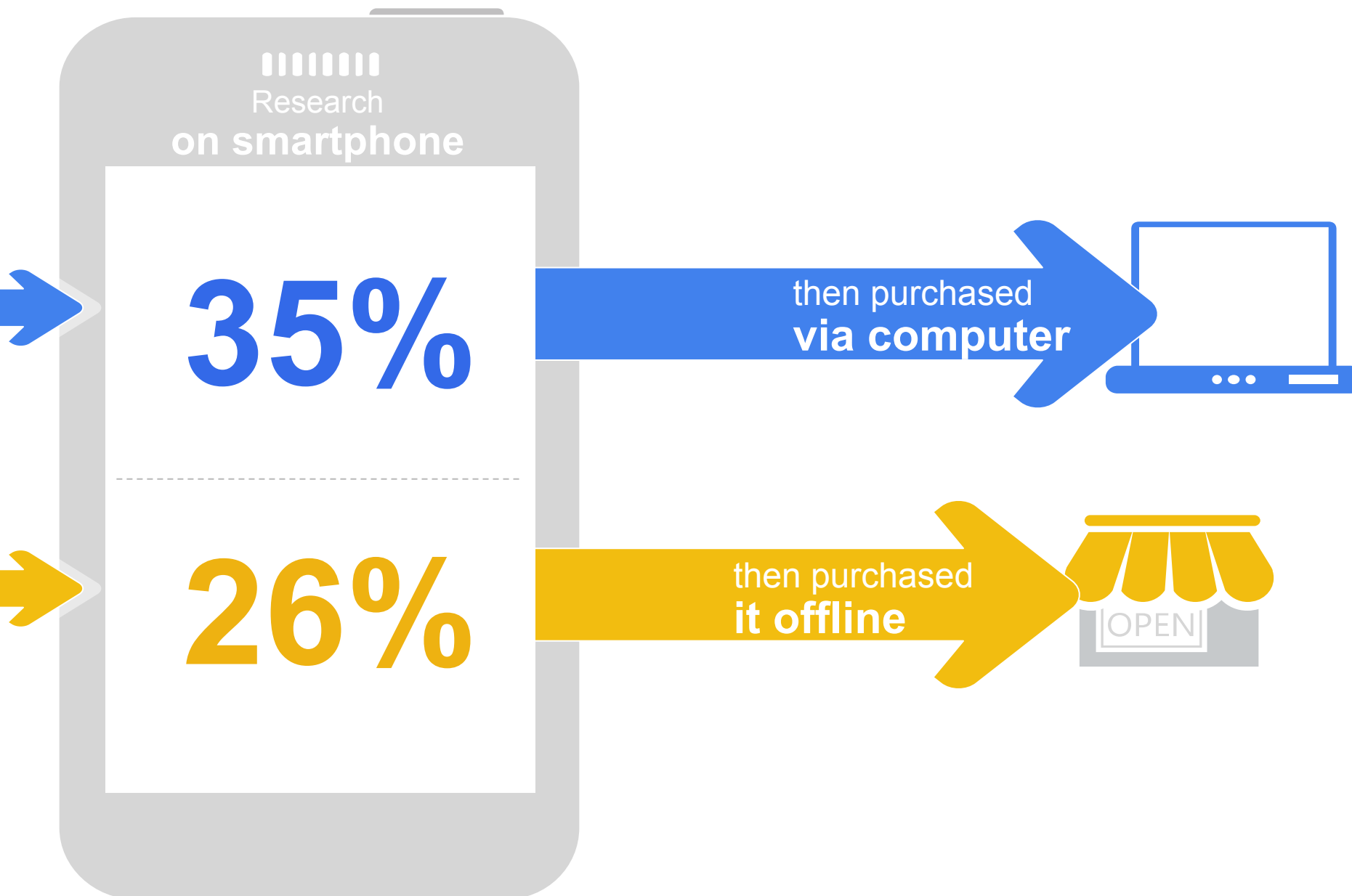
I have changed my mind about purchasing a product or service online as of a result of information that I gathered using my smartphone.



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? Please answer on a scale from 1 to 5. A "1" means that you completely disagree with the statement, a "5" means that you completely agree with the statement.

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.

Smartphones Are an Emerging Point of Purchase



32%

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

59%

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? By product or service we mean everything that you can buy excluding apps.

Base: Private smartphone users who use the Internet in general and who purchased via Internet on their smartphone n= 315

Q45: Have you made a purchase by using your smartphone in the past month?

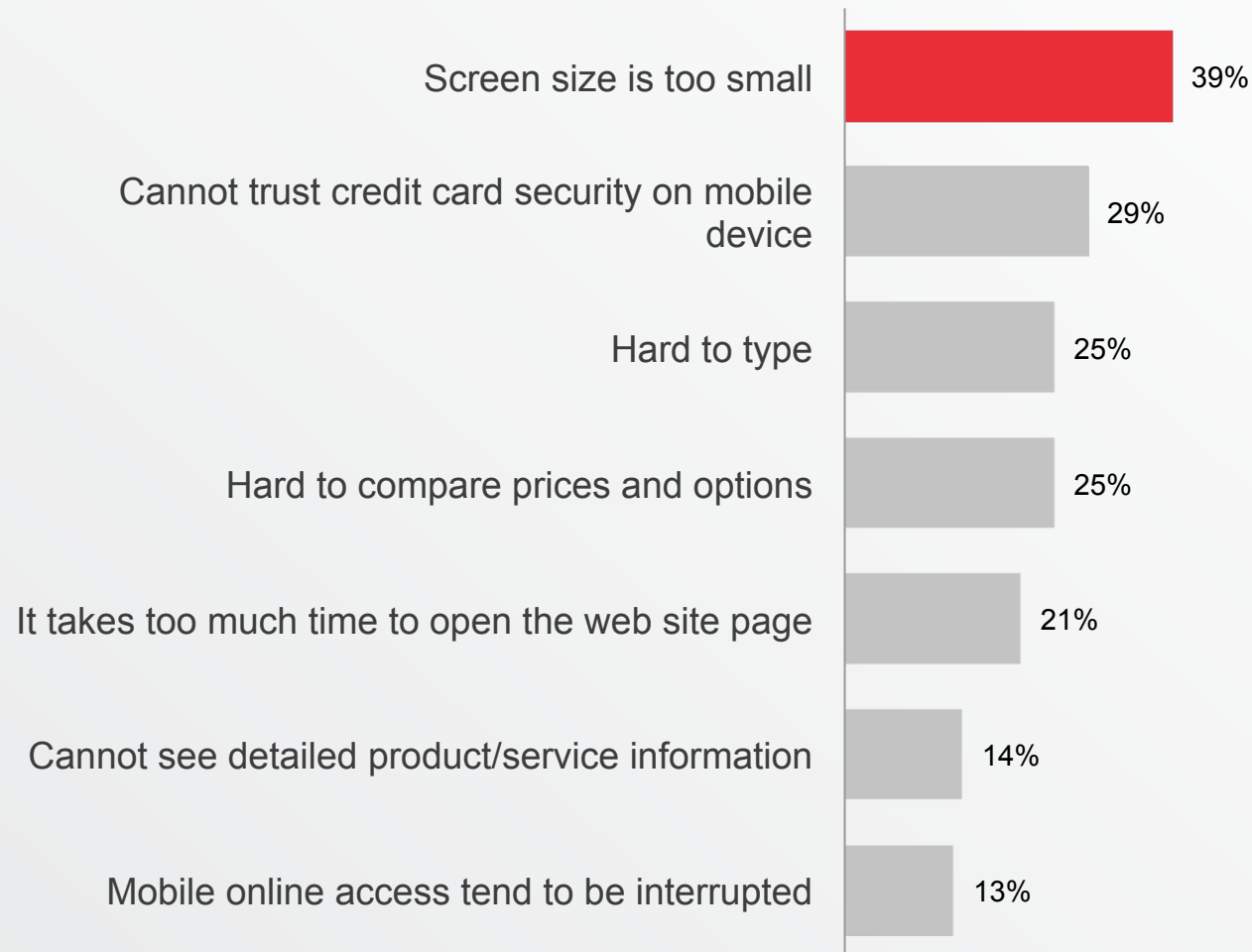
Smartphones Shoppers are Frequent Buyers



57%

make mobile purchases
at least once a month

Barriers to Mobile Commerce Still Exist

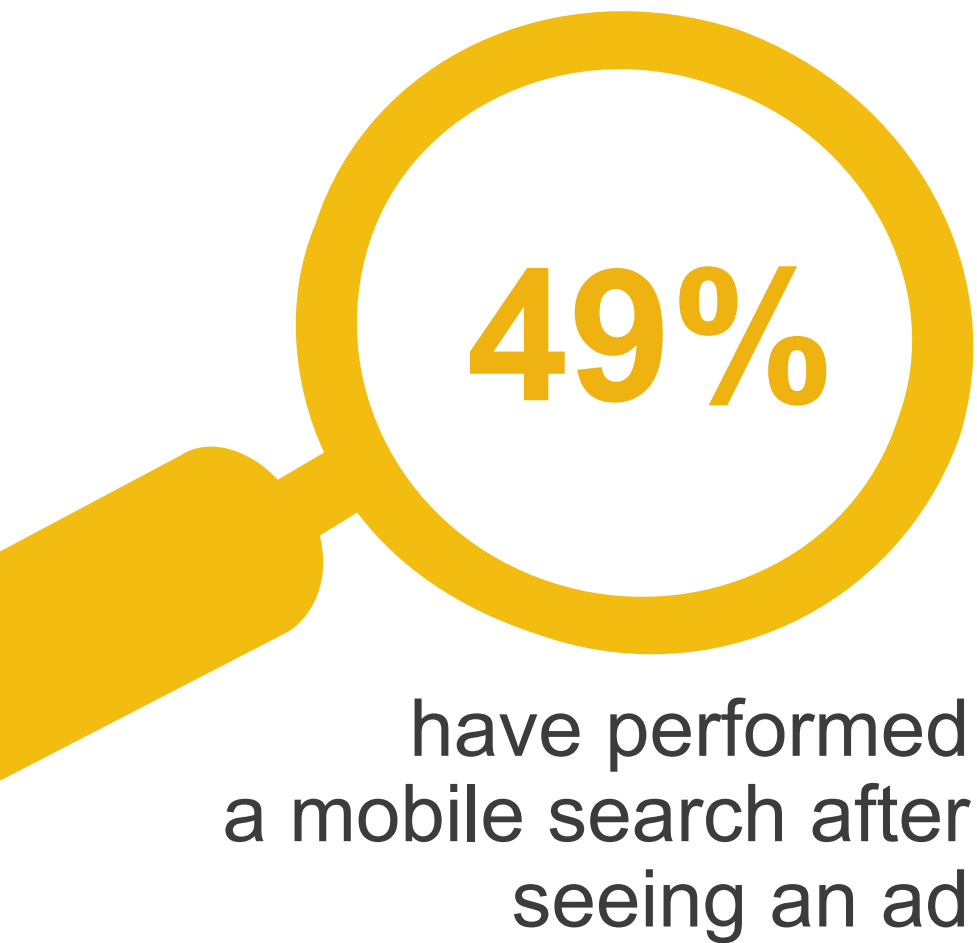


Smartphones

Help Advertisers Connect With Their Customers



Offline Ad Exposure Leads to Mobile Search



Ad location



TV
42%



Shop/business
39%



Magazines
36%



Posters / Billboards
29%



76%

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

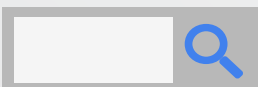


43%

While in app

40%

While on a website



24%

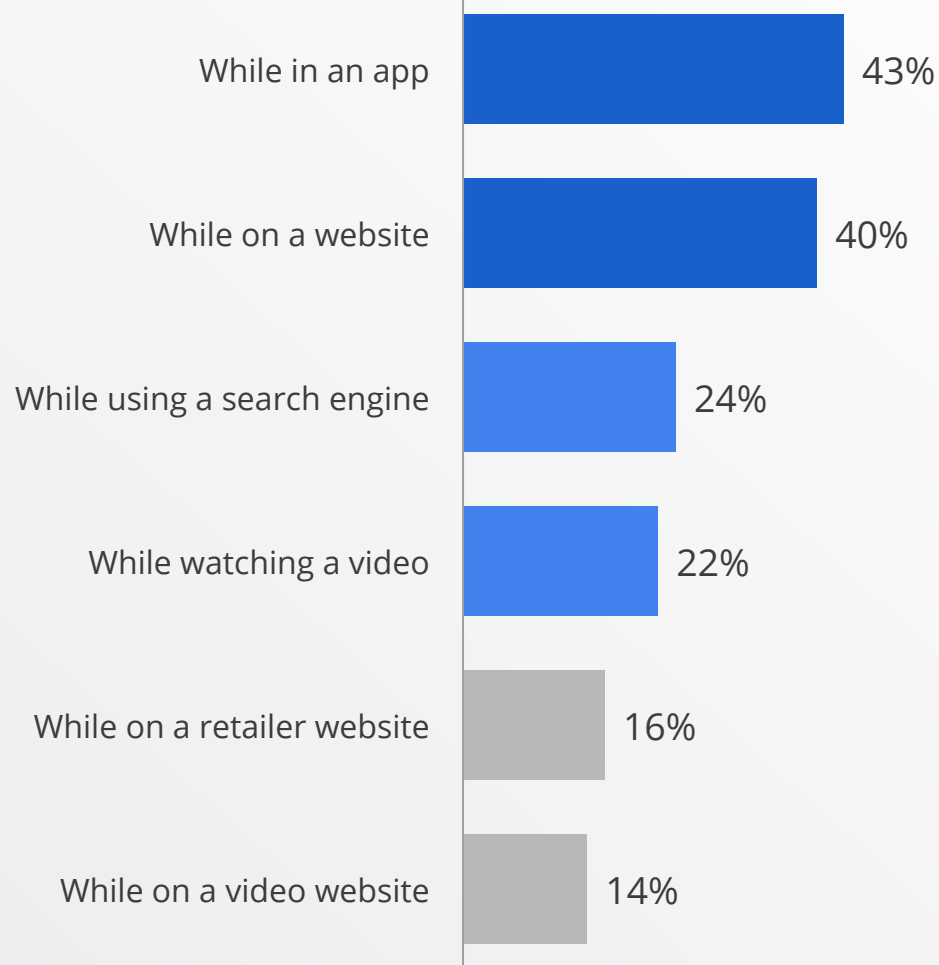
While using a search engine

22%

While watching a video



Where Mobile Ads Are Noticed



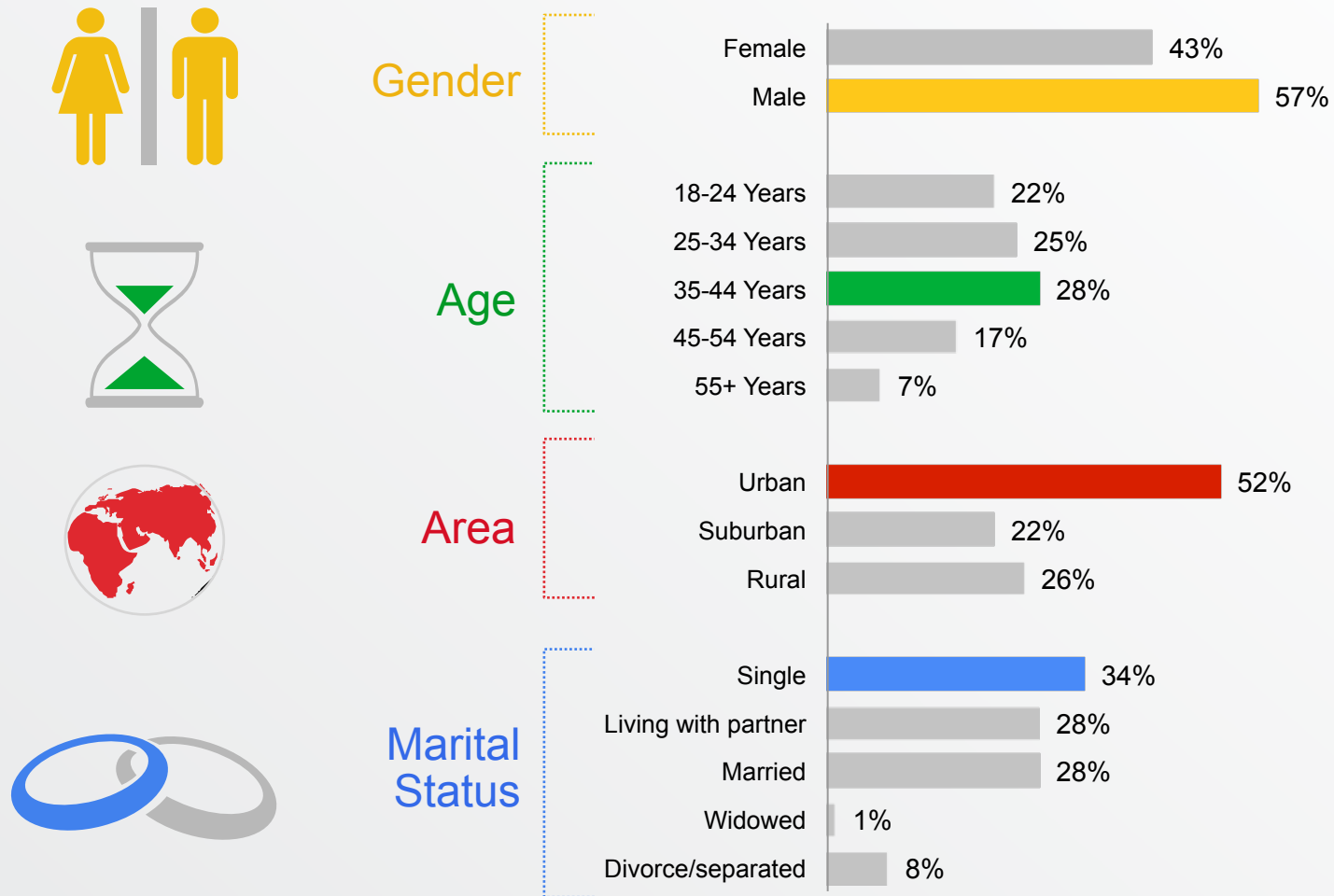
Background



Research Methodology

- In partnership with Ipsos MediaCT, we interviewed a total of 1,000 German 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 study and the data is weighted on age, gender, region, brand of smartphone, mobile internet usage frequency and tablet usage
- 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 behaviour and mobile advertising
- Interviews were conducted in Q1 2013

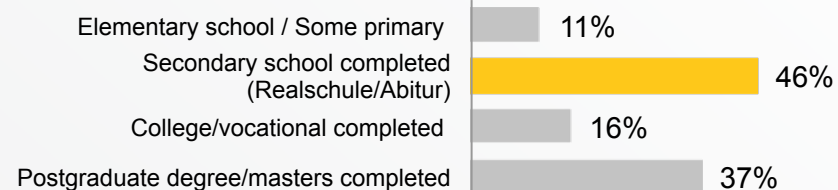
Demographics



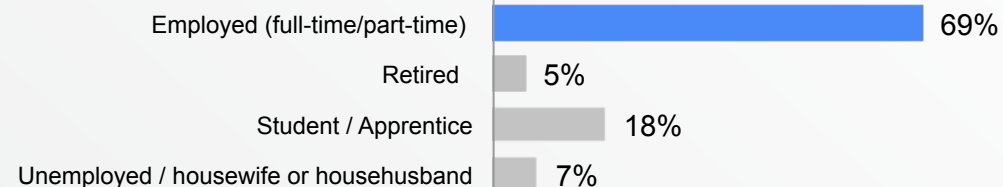
Demographics



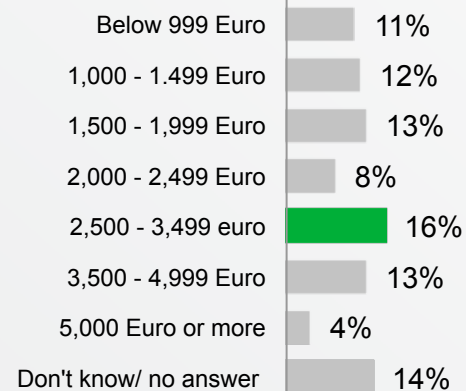
Education



Employment Status



Income



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

D4. What is the highest level of education that you have completed? D5. Which of the following best describes your employment status? D8. Which of these ranges comes closest to the total (annual) income of your household before anything is deducted for VAT, National Insurance (Social security), pension schemes, etc.?