

Our Mobile Planet: Global Smartphone Users

February 2012







Agenda



General Smartphone Usage

2 Mobile Local Usage

Mobile Commerce

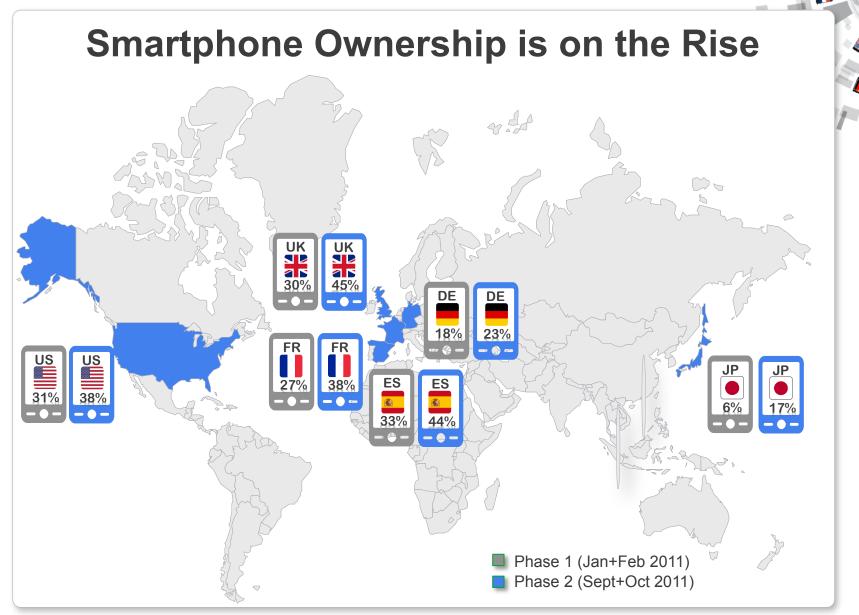
Background





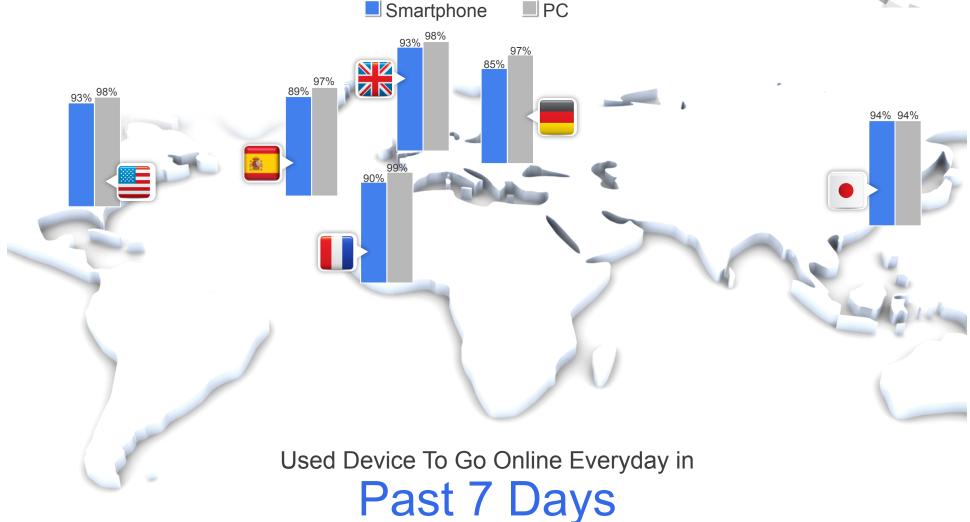
General Smartphone Usage





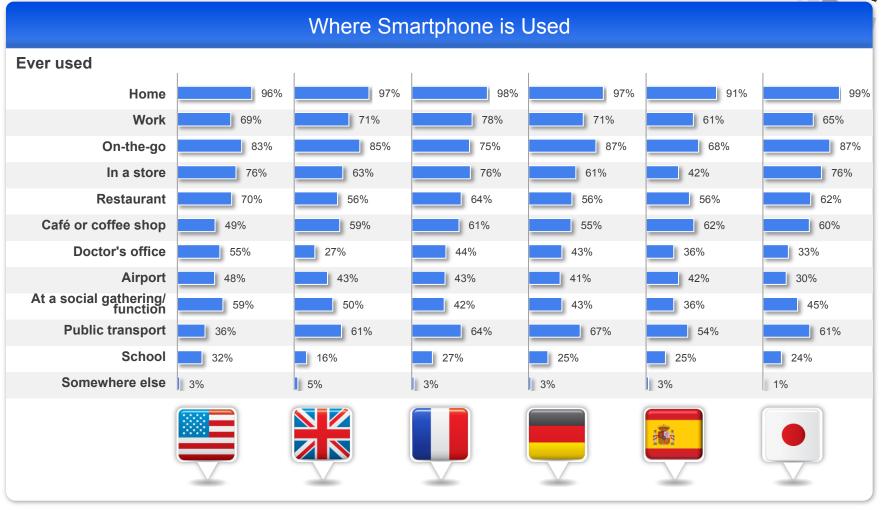
Users are Accessing the Web Through Desktop, and Now Mobile





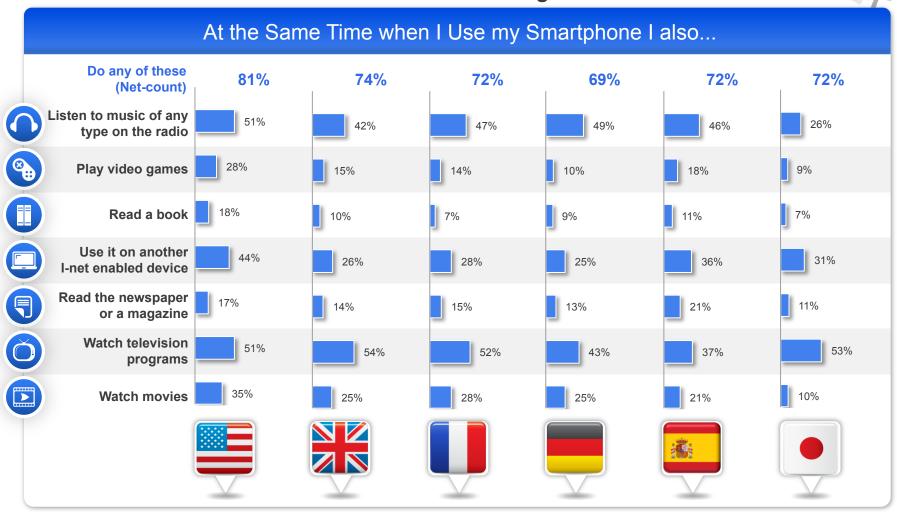
Smartphones are Consumers' Always-on Companion





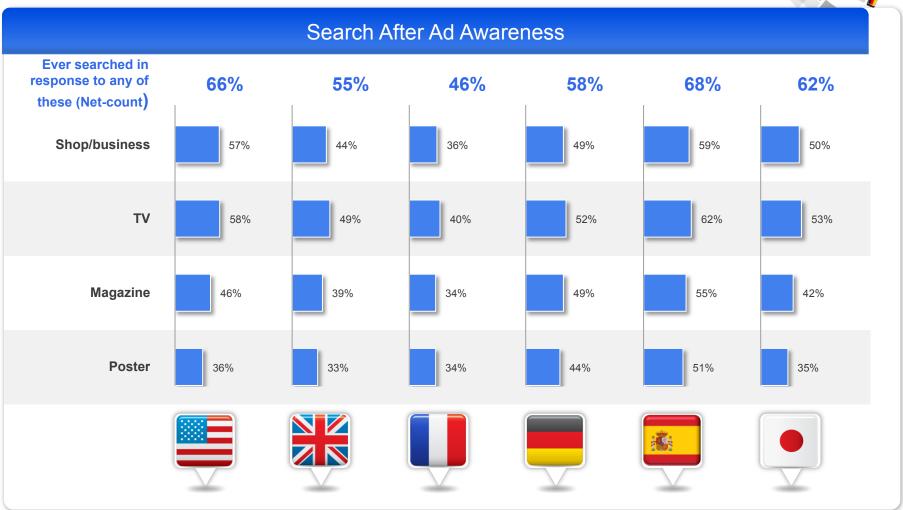
Smartphones Are Used While Consuming Other Media

Parallel media usage



Offline Media Influences Mobile Search





Base: Private smartphone users who use the internet in general and who at least rarely notice advertising; wave 2 (US: 881; UK: 831; FR: 849; DE: 786; ES: 861; JP: 911).

Q43a. How often do you use your smartphone to do a search in response to an ad you have seen in a magazine, on a poster, on TV or in a shop/business?

Search Engines Are a Frequent Touchpoint

Usage of search engines Usage of search engines on Smartphone once a week or more on Smartphone in general 95% 82% 96% 81% 95% 77% 92% 70% 96% 84% 99% 95%

Base: Private Smartphone users who use the internet in general (US: 1000; UK: 1000;,FR: 1000; DE: 1000; ES: 1000; JP:1000).

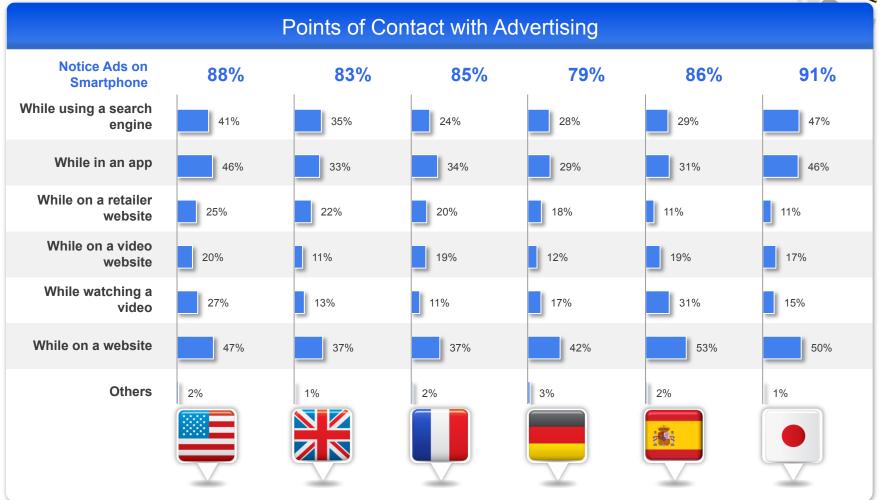
29. Which of the following search engines do you use to search for information on your ...?

Base: Private Smartphone users who use the internet in general and who are searching via search engine (US: 954; UK: 959; FR: 951; DE: 919; ES: 960; JP: 986).

Q31. How often do you do searches (via Google Yahoo! Bing etc.) on your ...?

Smartphone Users Notice Mobile Ads





Base: Private Smartphone users who use the internet in general; wave 2 (US: 1000; UK: 1000; FR: 1000; DE: 1000; ES: 1000; JP: 1000).

Q41. How often do you notice advertising when you are using the browser or an app on your smartphone?

Base: Private smartphone users who use the internet in general and who at least rarely notice advertising;

wave 2 (US: 881; UK: 831; FR: 849; DE: 786; ES: 861; JP: 911).

Q42. Where have you noticed the advertising when using your Smartphone?

App Usage Is Prevalent

	Average Number of Apps Installed	Average Paid Apps	Average Apps Used in Past 30 Days
United States	26	6	11
United Kingdom	23	6	8
France	29	6	10
Germany	23	9	9
Spain	19	6	8
Japan	42	6	8

Base: Private Smartphone users who use the internet in general (US: 1.000; UK: 1.000; FR: 1.000; DE: 1.000; ES: 1.000; JP: 1.000).

How many apps do you currently have on your Smartphone?

Private Smartphone users who use the internet in general and who have at minimum one app on their Smartphone (US: 1.000 (963);UK: 1.000 (954); FR: 1.000 (971); DE: 1.000 (938); ES: 1.000 (991); JP: 1.000 (992)).

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?

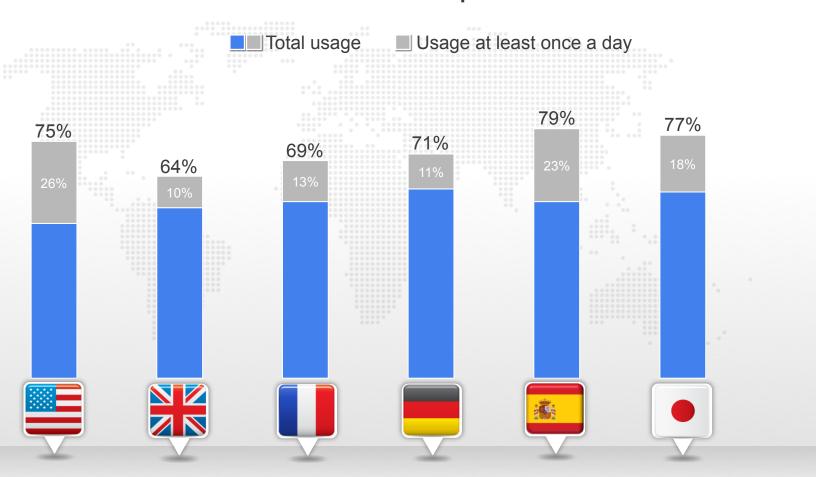
Q25. And of the apps you currently have installed on your Smartphone, how many have you used actively in the last 30 days?

Google Confidential and Pro

Smartphone Users Are Avid Video Watchers



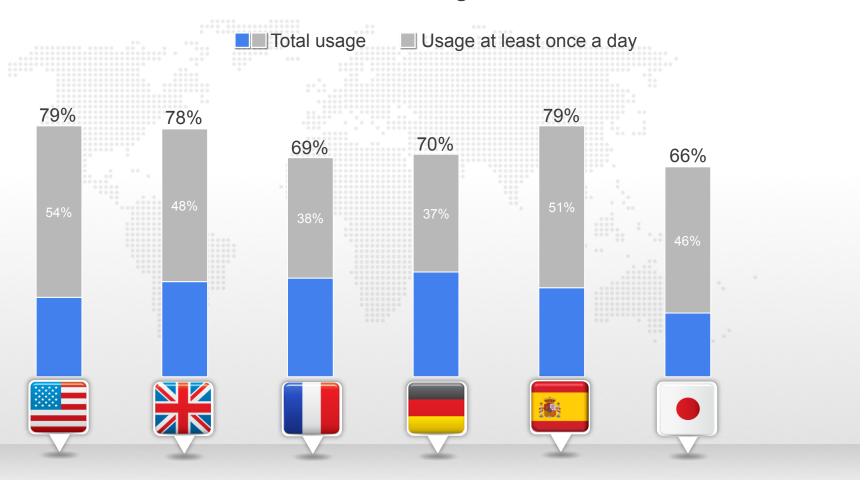
Online Video Consumption



Smartphone Users Are Frequent Social Networkers



Social Media Usage





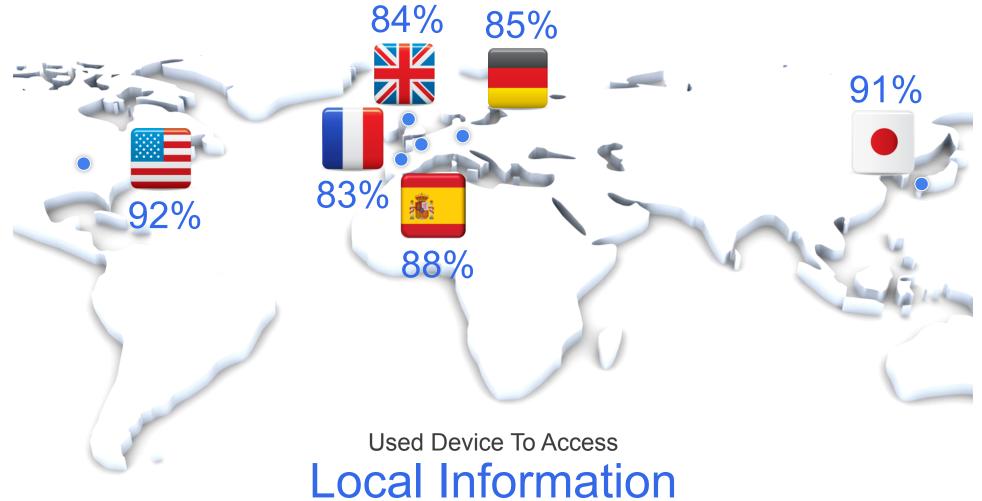


Mobile Local Usage



Smartphone Users Seek Local Information





...And, These Local Information Seekers Take Action

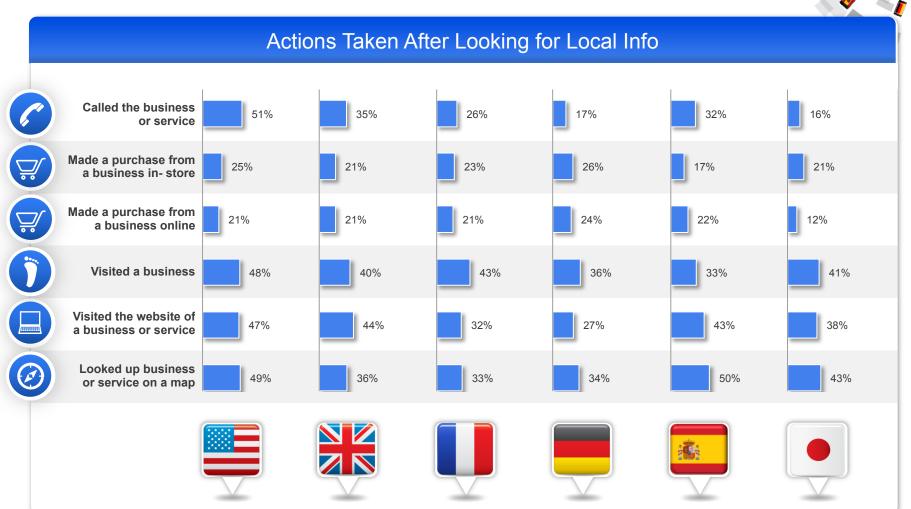


Have Taken Action After Looking Up Local Content



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; wave 2 (US: 920; UK: 840; FR: 834; DE: 852; ES: 885; JP: 913).

1 in 5 Make a Purchase after Looking for Local Info







Mobile Commerce



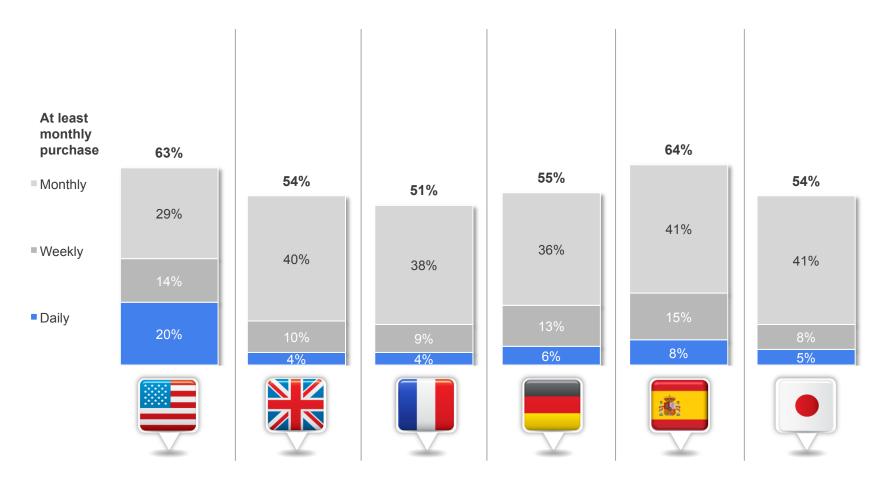
Mobile Is an Emerging Point of Purchase





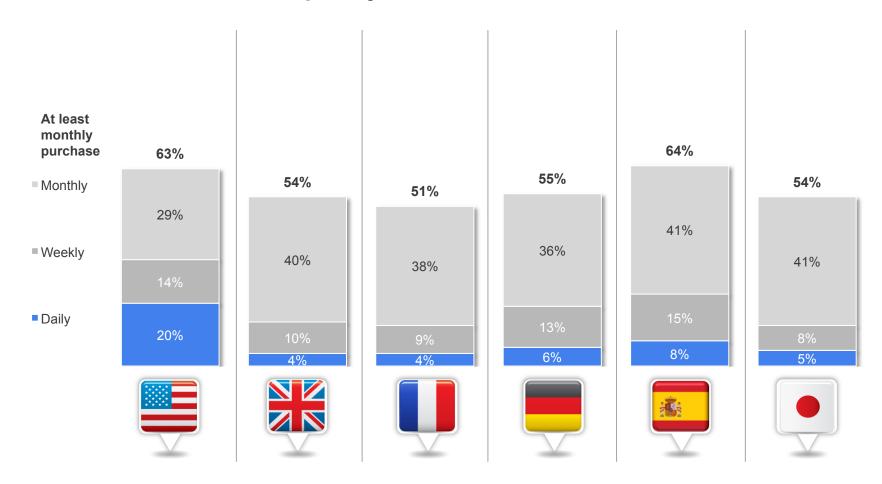
At Least Half of Mobile Shoppers Make Purchases Monthly on Their Smartphones

Frequency of Mobile Purchase

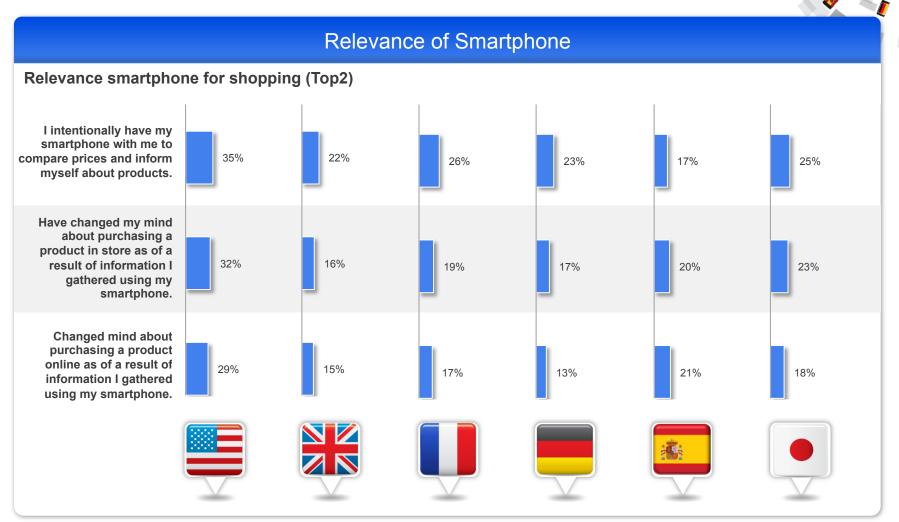


At Least Half of Mobile Shoppers Make Purchases Monthly on Their Smartphones

Frequency of Mobile Purchase

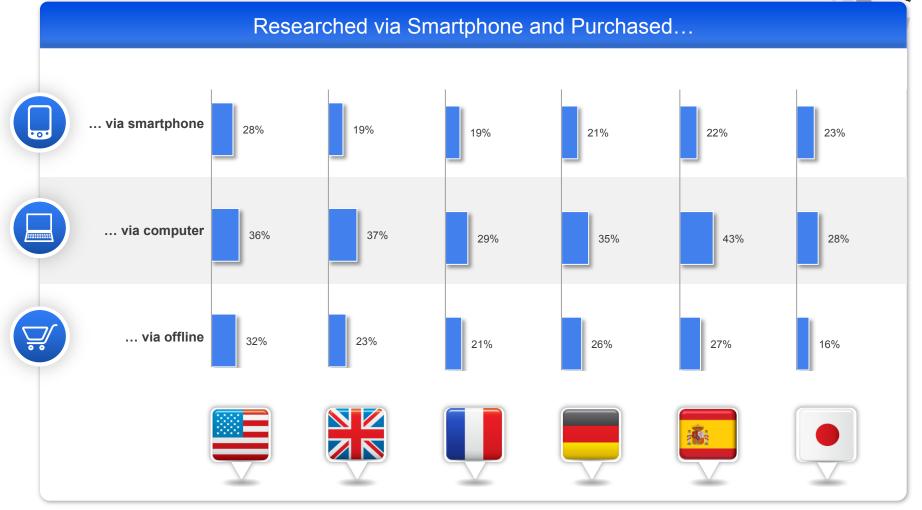


Smartphones Influence Consumer Purchase Decisions



Smartphone Research Also Leads to Purchase Online and In-store









Background



Demographics 1/2



			Age				
18 - 24 Years	25%	21%	26%	26%	18%	28%	
25 - 34 Years	24%	29%	33%	27%	32%	32%	
35 - 44 Years	18%	27%	23%	25%	29%	20%	
45 - 54 Years	24%	15%	14%	16%	15%	13%	
55 + Years	9%	8%	5%	6%	6%	7%	
Gender							
Female	49%	45%	43%	39%	42%	38%	
Male	51%	55%	57%	61%	58%	62%	
			Education				
High	43%	41%	65%	57%	43%	44%	
Middle	41%	40%	18%	35%	35%	34%	
Low	17%	19%	15%	9%	22%	21%	
			Area				
Urban	33%	35%	49%	52%	84%	34%	
Suburban	50%	46%	25%	23%	9%	46%	
Rural	17%	19%	26%	26%	7%	21%	

Base: Private smartphone users who use the internet in general, wave 2 (US: 1.000; UK: 1.000, FR: 1.000; DE: 1.000; ES: 1.000; JP: 1.000). Demographics

Demographics 1/2



		IV	larital Status			
Single	35%	35%	34%	36%	35%	51%
Living with partner	11%	18%	28%	27%	22%	7%
Married	42%	38%	32%	30%	38%	38%
Widowed	1%	1%	0%	0%	1%	0%
Divorced/ separated	11%	7%	4%	5%	4%	3%
Prefer not to answer	0%	0%	1%	1%	1%	0%
			Income			
High	23%	34%	60%	31%	27%	29%
Middle	53%	32%	19 %	28%	37%	37%
Low	16%	22%	5%	23%	20%	18%
		Emp	loyment Stat	us		
Employed	62%	75%	68%	67%	64%	65%
Retired	6%	3%	7%	4%	3%	2%
Student	13%	9%	16%	17%	13%	14%
Unemployed/homemaker	19%	13%	9%	12%	20%	19%

Base: Private smartphone users who use the internet in general, wave 2 (US: 1.000; UK: 1.000, FR: 1.000; DE: 1.000; ES: 1.000; JP: 1.000). Demographics

Research Methodology

- Online interviews with private smartphone users who use the Internet on their smartphone (aged 18+) in 26 countries
- Distribution according to national representative CATI Study
- Interviews were conducted in Q1 2012 (Fieldwork in January / February)
- This presentation will focus on the following markets:
 - United States (n=1,000)
 - United Kingdom (n=1,000)
 - France (n=1,000)
 - Germany (n=1,000)
 - Spain (n=1,000)
 - Japan (n=1,000)
- Data for other countries released over next few months
- Global Smartphone User surveys conducted by Ipsos Gmbh and Enumeration Study conducted by TNS Infratest Gmbh

Research Objectives

Gain a deep understanding of smartphone consumer behavior, specifically with regard to:



How are smartphones used in daily life?



How do consumers multi-task with their smartphones?



What types of info are consumers searching for on mobile?

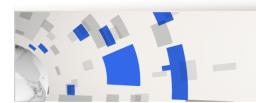


How do consumers use their smartphones to find local info?



How do smartphones influence the shopping process and behavior?





Thank you