



Our Mobile Planet: Germany

Understanding the Mobile Consumer

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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 29% of the population and these smartphone owners are becoming increasingly reliant on their devices. 64% 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 73% using their phone while doing other things such as watching TV (43%). **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. 82% of smartphone users look for local information on their phone and 80% 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 97% having researched a product or service on their device. Smartphone research influences buyer decisions and purchases across channels. 28% 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 80% of smartphone users. Smartphones are also a critical component of traditional advertising as 59% 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

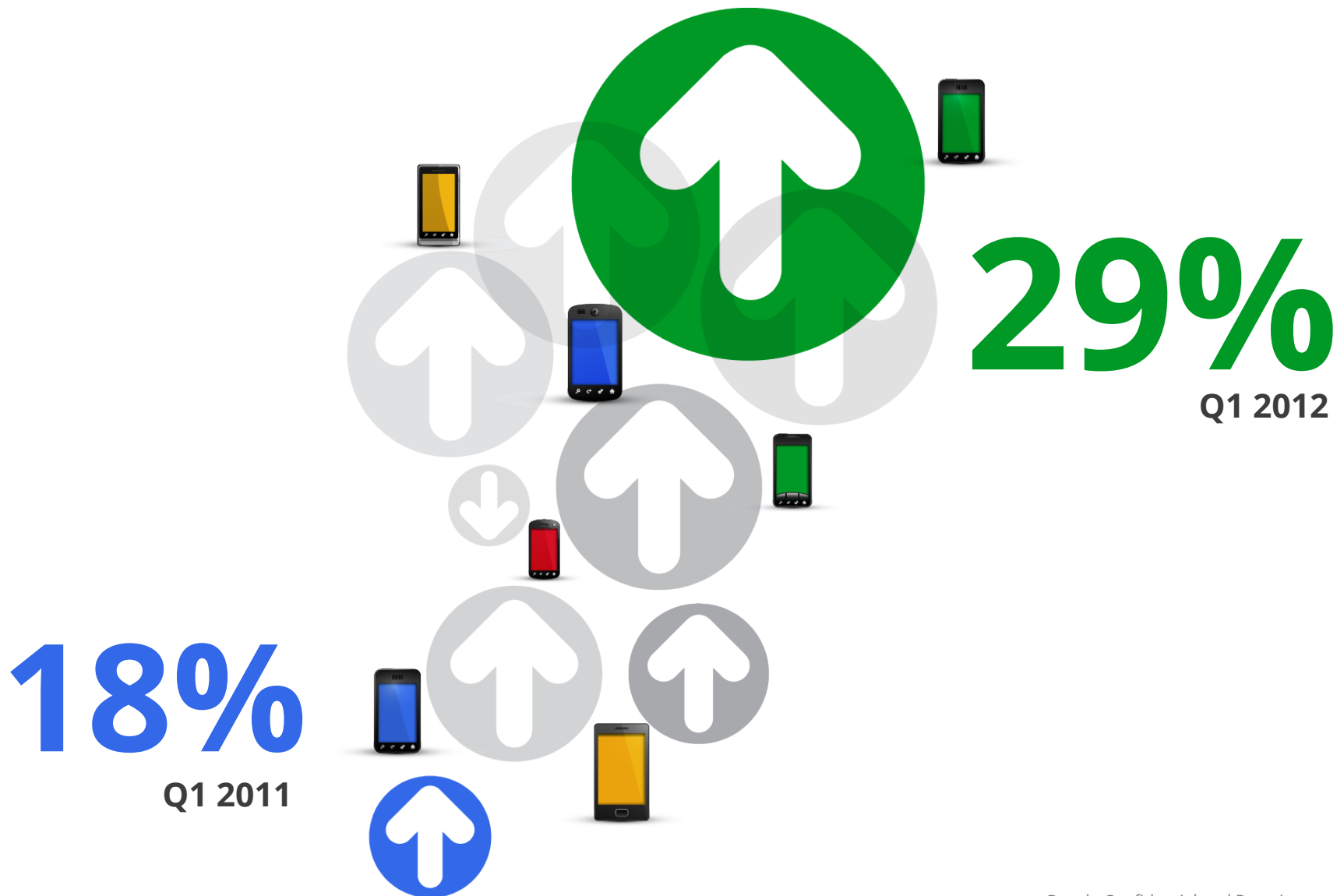
- 4** Smartphones Change the Way Consumers Shop

- 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

50%

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

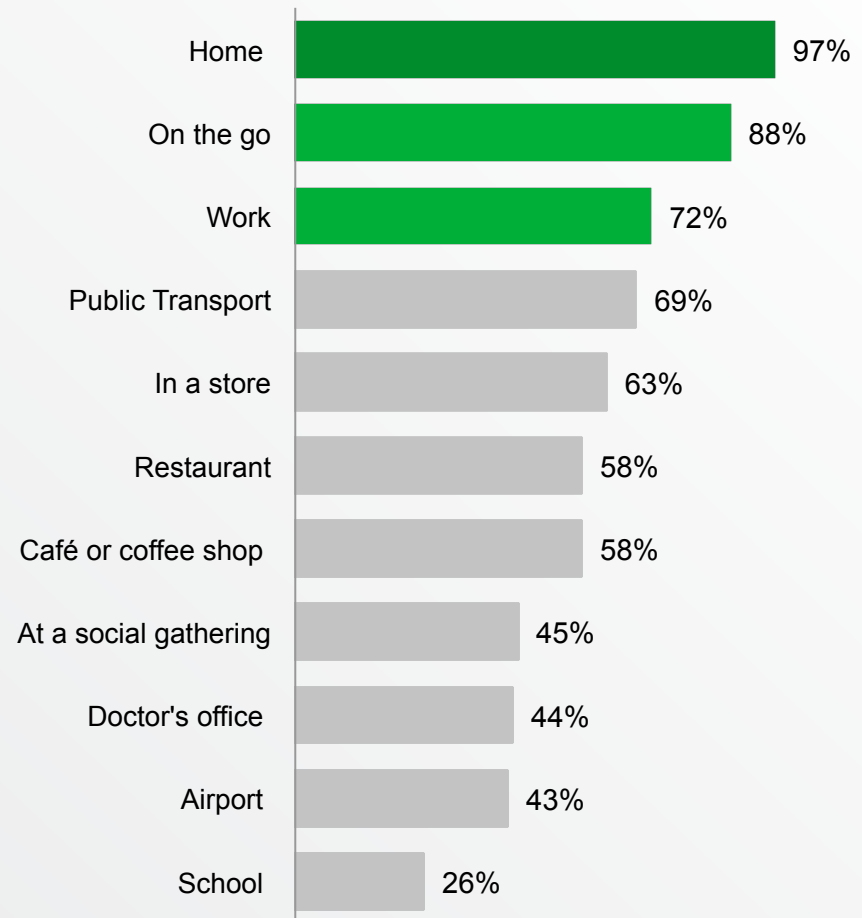
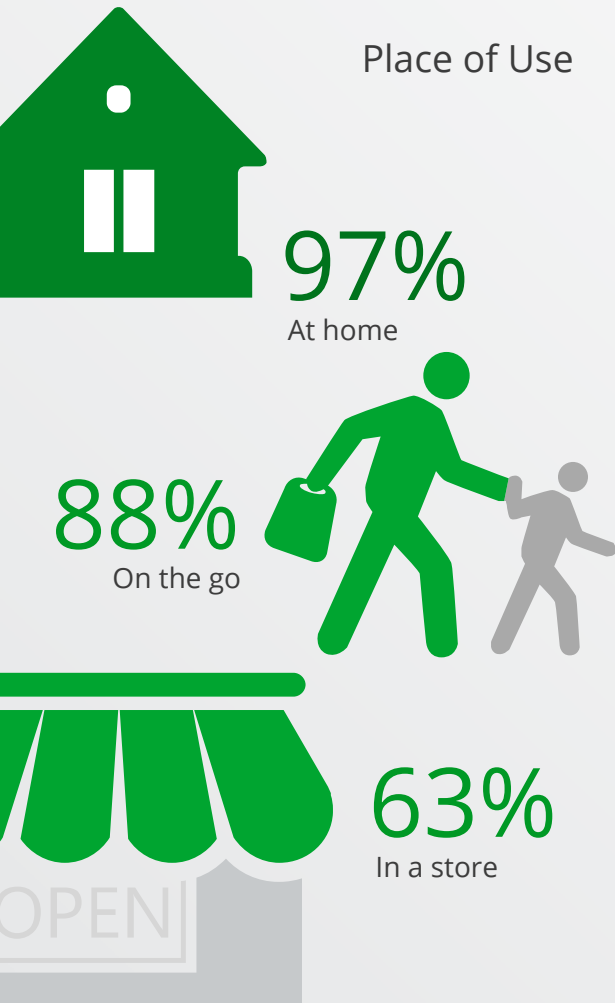


64%
don't leave home
without their device

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

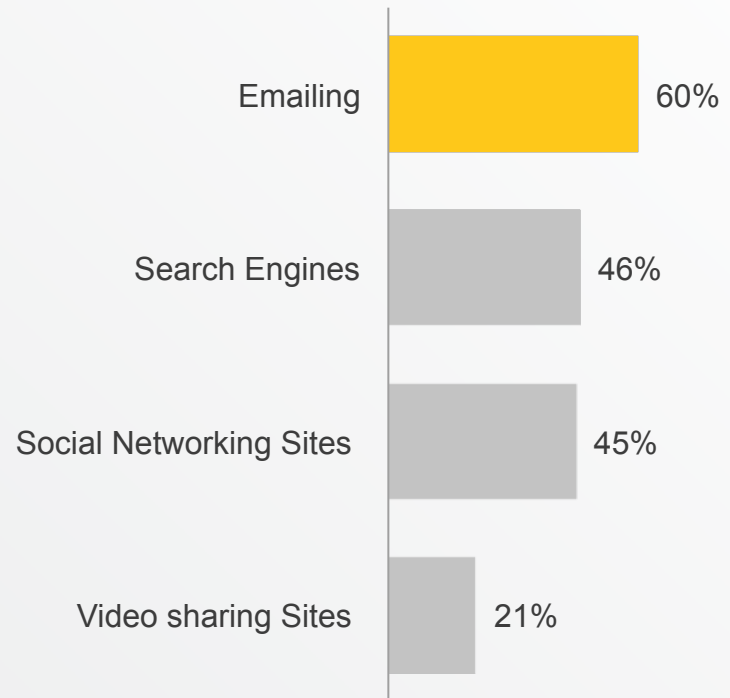


Allowing Users to Stay Fully Connected



53%

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

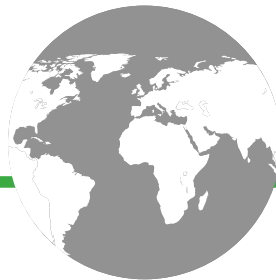
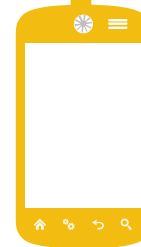
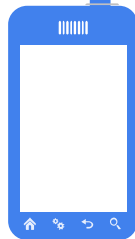
Q9: Using the scale below, please indicate approximately how frequently you use the Internet in general and specific services and types of websites through your browser or apps on your smartphone? Responses reflect at least once a day.

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Smartphone Use is Expected to Increase

28%

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



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

Q21: Thinking about the next 12 months, what do you expect, how will you be using the internet with your...?

Google Confidential and Proprietary

Smartphones Have Become so Important to Consumers that ...

22%

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'

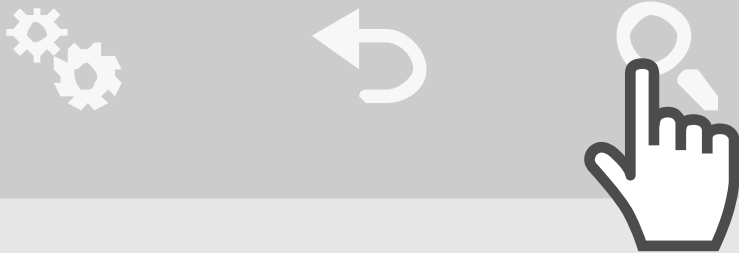
SMARTPHONES
HAVE TRANSFORMED
CONSUMER BEHAVIOR



Smartphones are a Major Access Point for Search

40%

search on their smartphones
every day



Smartphones Inform Our Daily Life



Smartphones are a Multi-Activity Portal



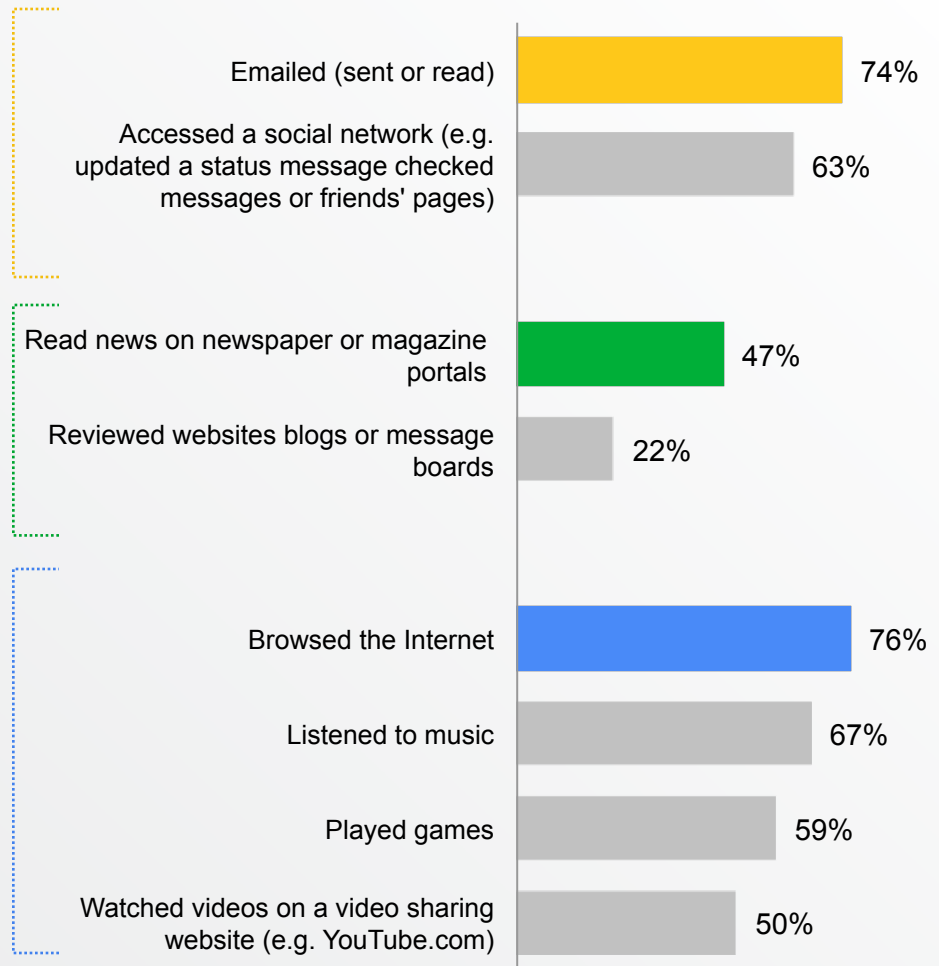
84%
Communication



52%
Stay Informed



90%
Entertainment



App Usage is Ubiquitous



24 apps installed
on average

9 apps used in the
last 30 days

10 paid apps installed
on average

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

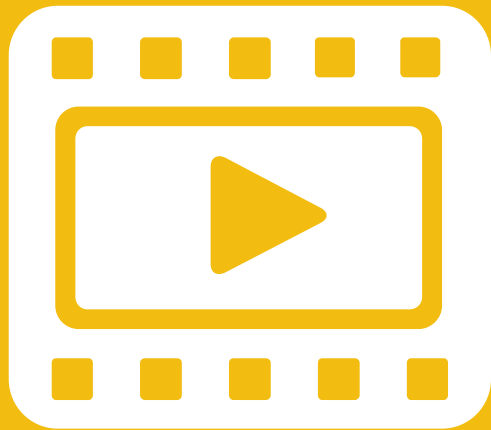
Q24: How many apps do you currently have on your smartphone?

Base: Private smartphone users who use the internet in general and who have at minimum one app on their smartphone, n= 949

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



CLICK TO WATCH VIDEO

73%

watch video

11%

use video at least
once a day

Smartphone Users are Frequent Social Networkers

73%

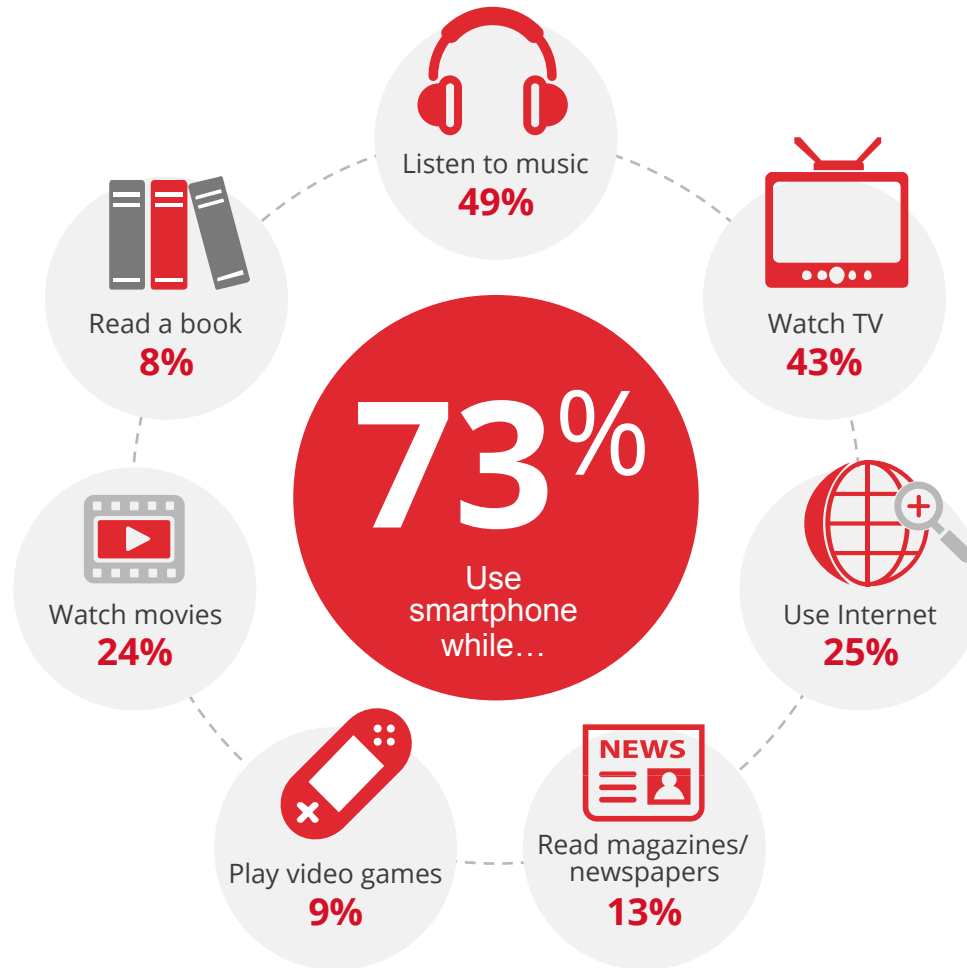
visit social
networks

38%

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





82%

of smartphone users
have looked for local
information

80%

have taken action as
a result

Base: Private smartphone users who use the internet in general. Smartphone n=1,000
Q3: How often do you look up 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 on the internet. Q3: Which of the following actions have you taken after having
looked up local businesses or services on your smartphone? (Select all that apply)

Looking for Local Information is a Frequent Smartphone Activity



42%

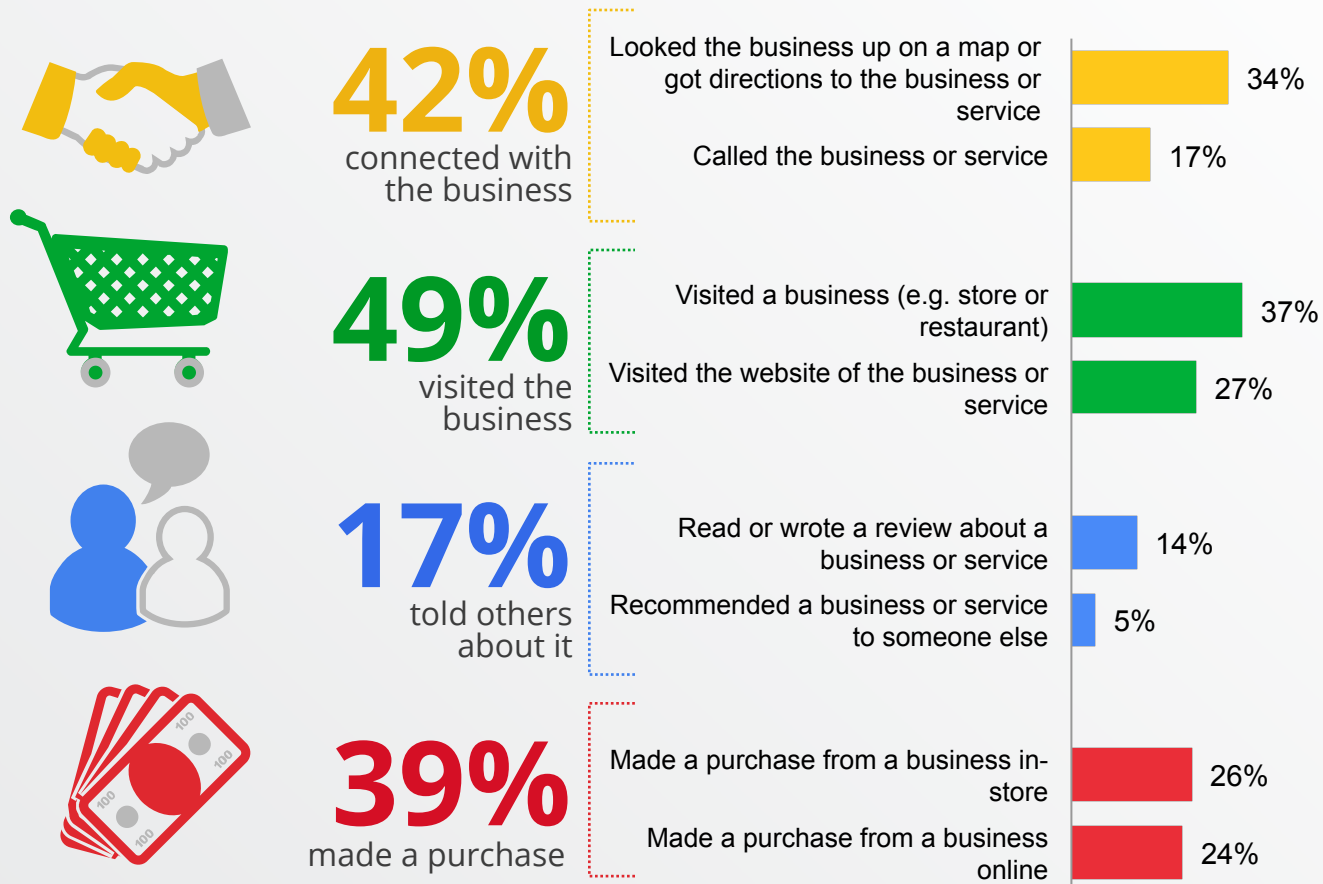
Look for local information at least **once a week**



14%

Look for local information **daily**

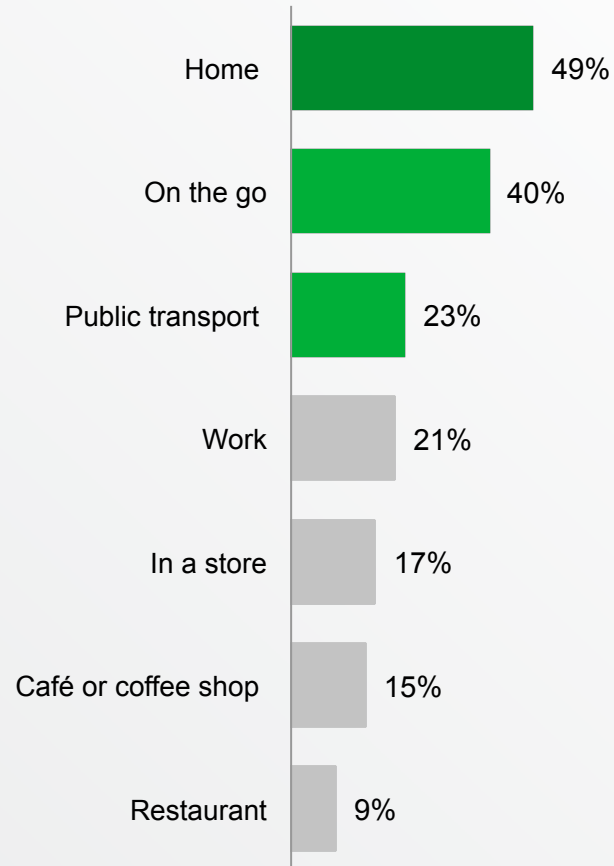
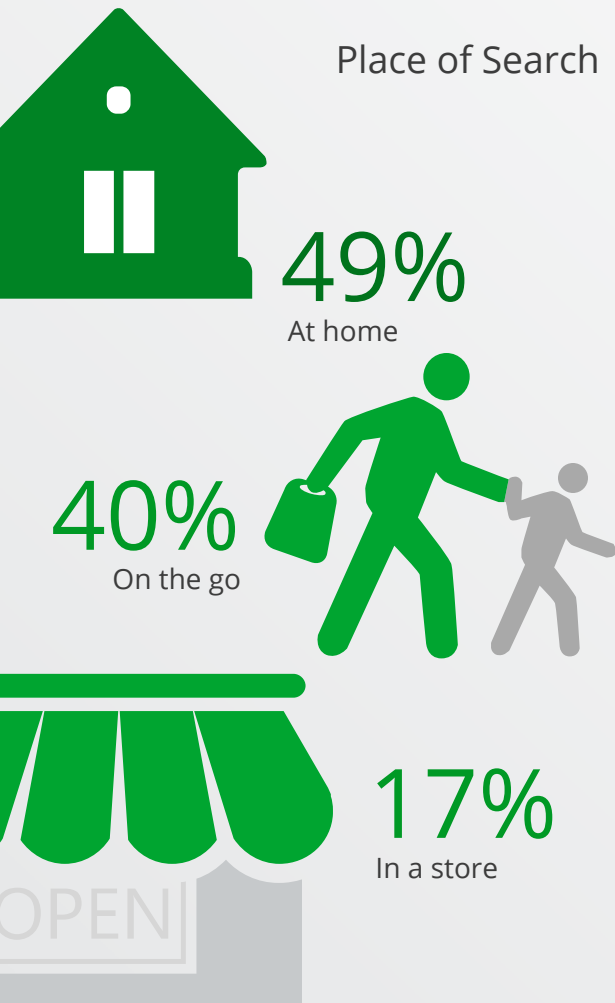
Local Information Seekers Take Action



SMARTPHONES
CHANGE THE WAY
CONSUMERS SHOP



Smartphones Allow Users to Research Products Anytime, Anywhere



97%

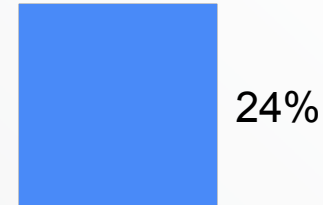
have researched
a product or service
on their phone



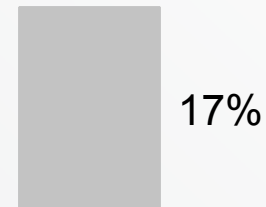
Smartphones are Our Primary Shopping Companions



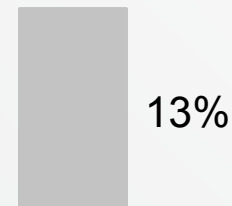
I intentionally have my smartphone with me
to compare prices and inform myself about products.



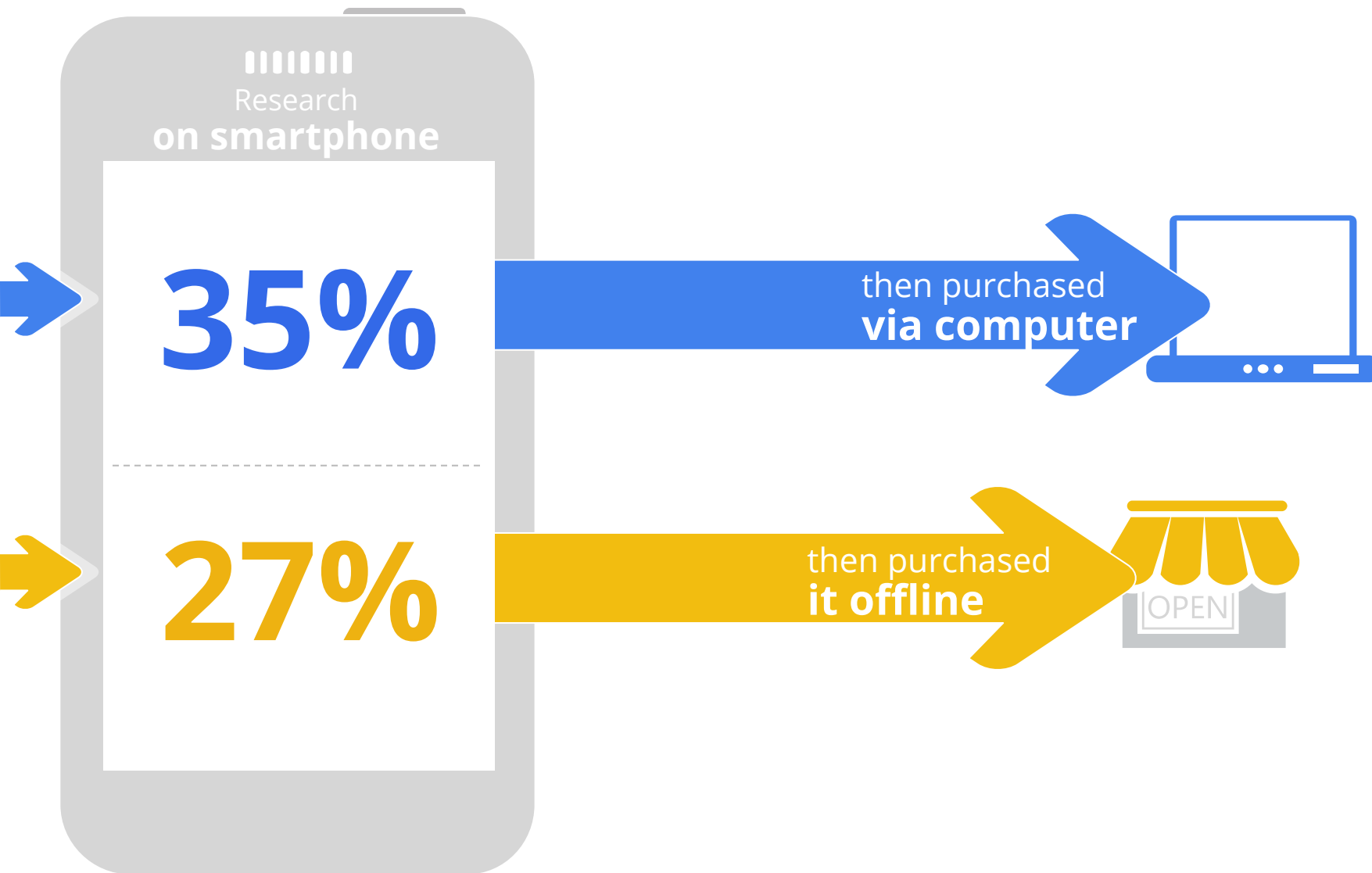
I have changed my mind about purchasing a product or service in store as of a result of information I gathered using my smartphone.



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



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



28%

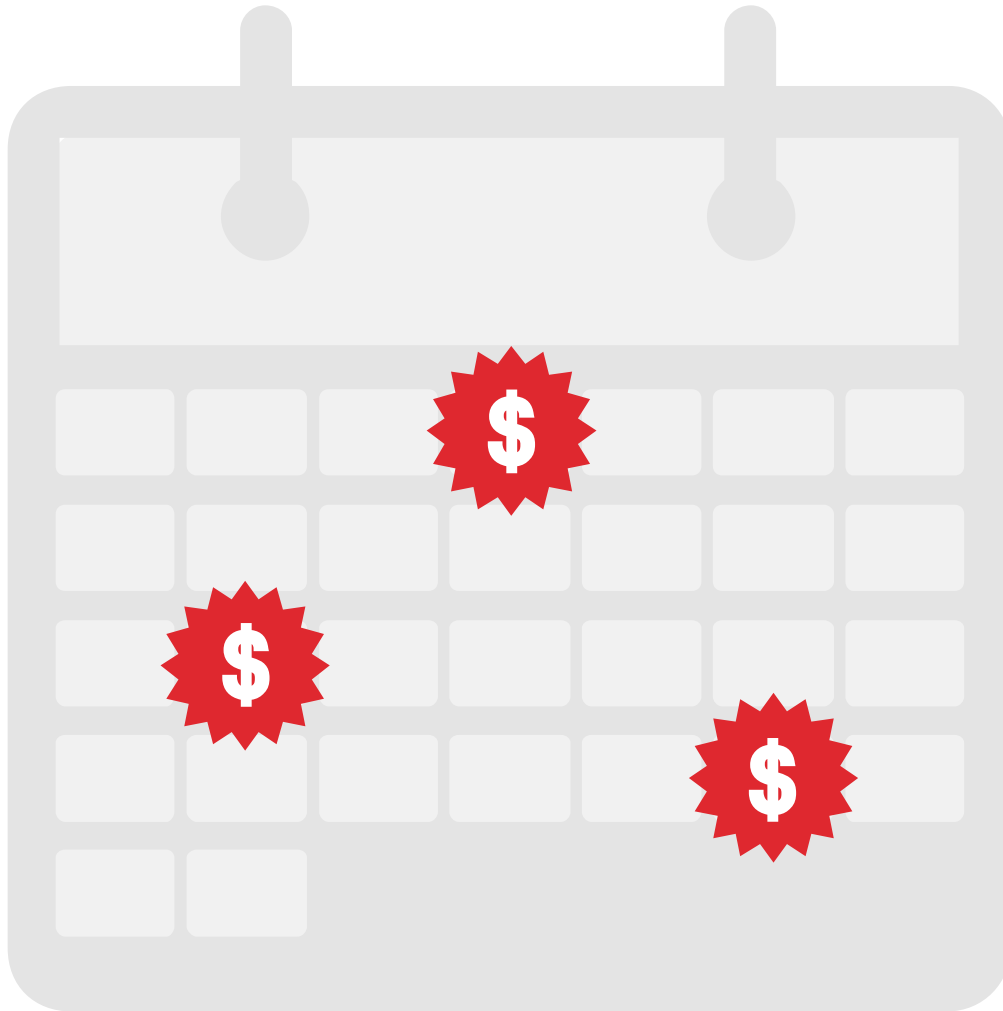
of smartphone users
have purchased a
product or service
on their smartphone

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? With product or service we mean everything you can excluding apps. Base: Private smartphone users who use the internet in general and who purchased via internet on their smartphone n= 276
Q45: Have you made a purchase by using your smartphone in the past month?

Smartphones Shoppers are Frequent Buyers



56%

make mobile purchases
at least once a month

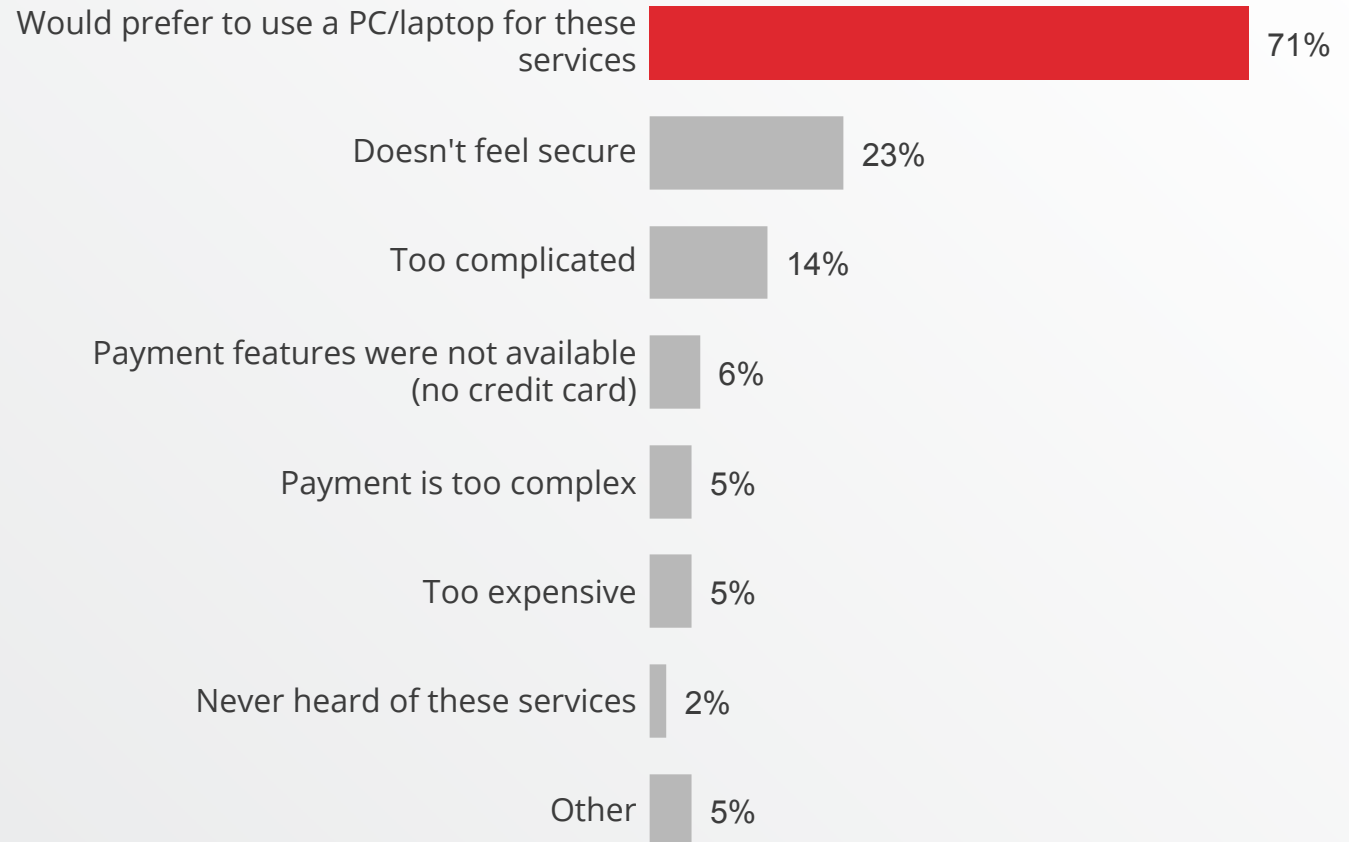
Mobile Commerce will Continue to Grow



16%

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

Barriers to Mobile Commerce Still Exist

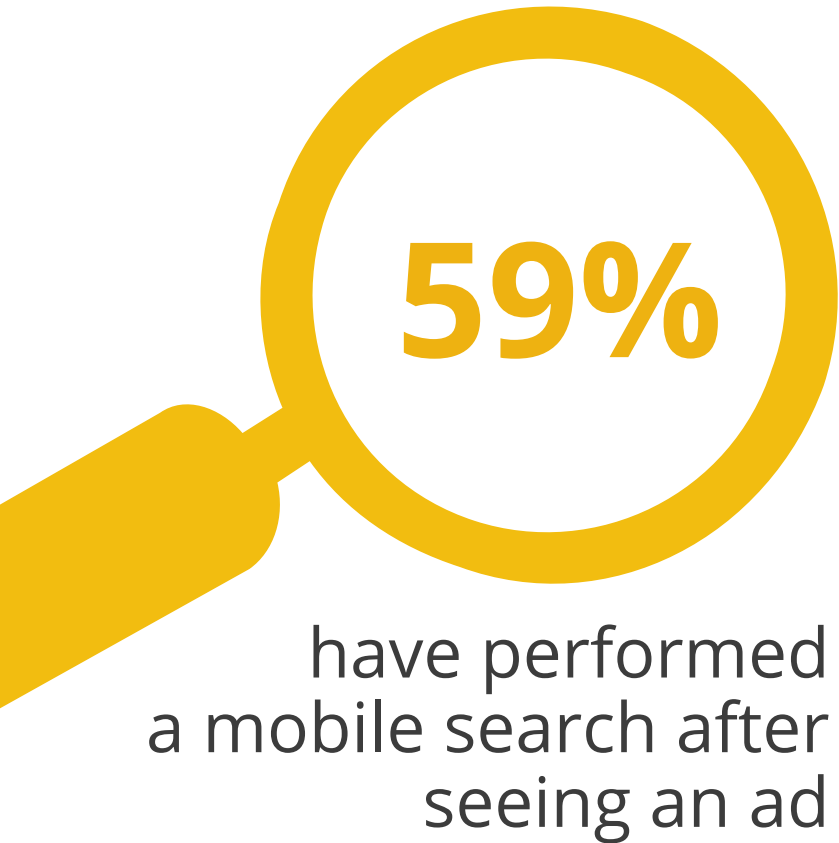


Smartphones

Help Advertisers Connect With Their Customers



Offline Ad Exposure Leads to Mobile Search



Ad location



TV
53%



Shop / Business
51%



Magazines
50%



Posters / Billboards
44%

The First Page of Mobile Search Results is Key

45%

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



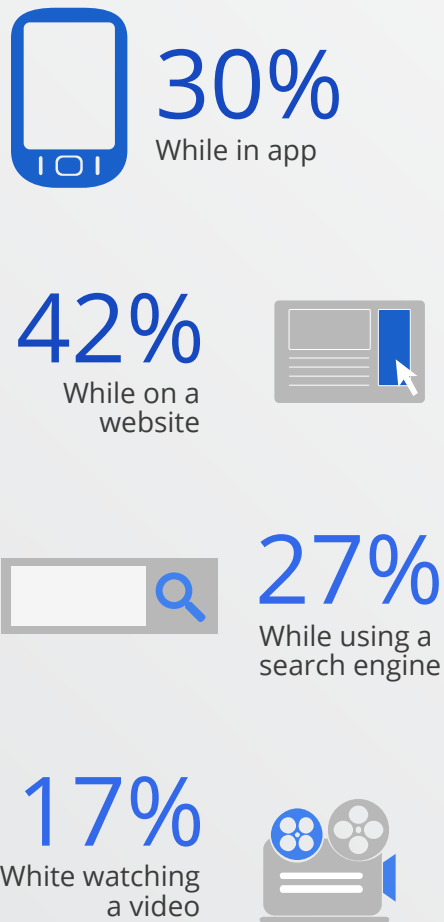


80%

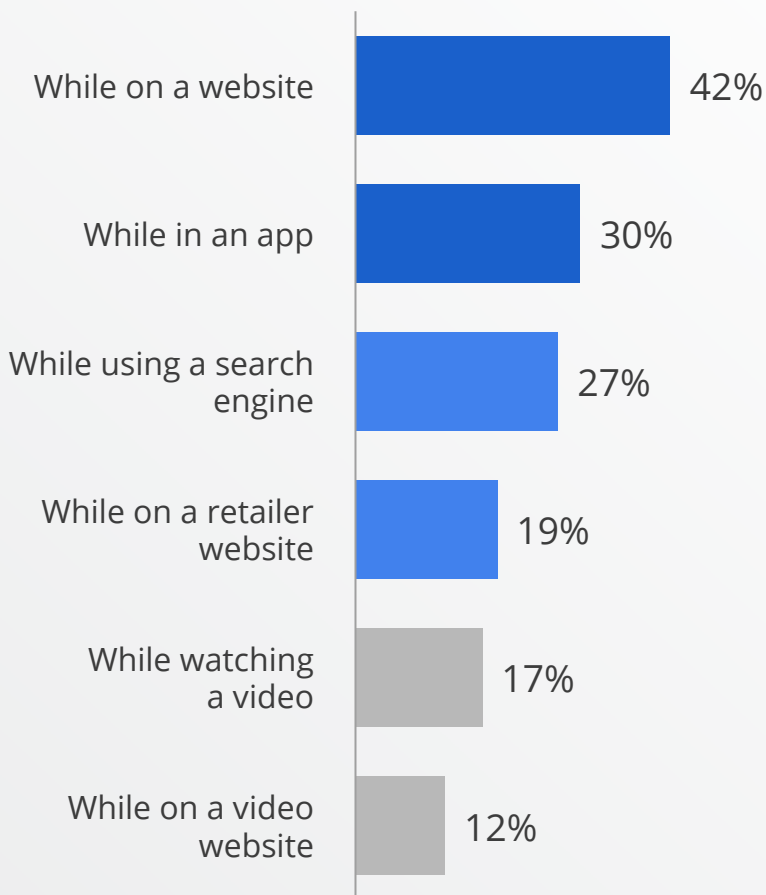
of smartphone users
notice mobile ads

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



Where Mobile Ads Are Noticed



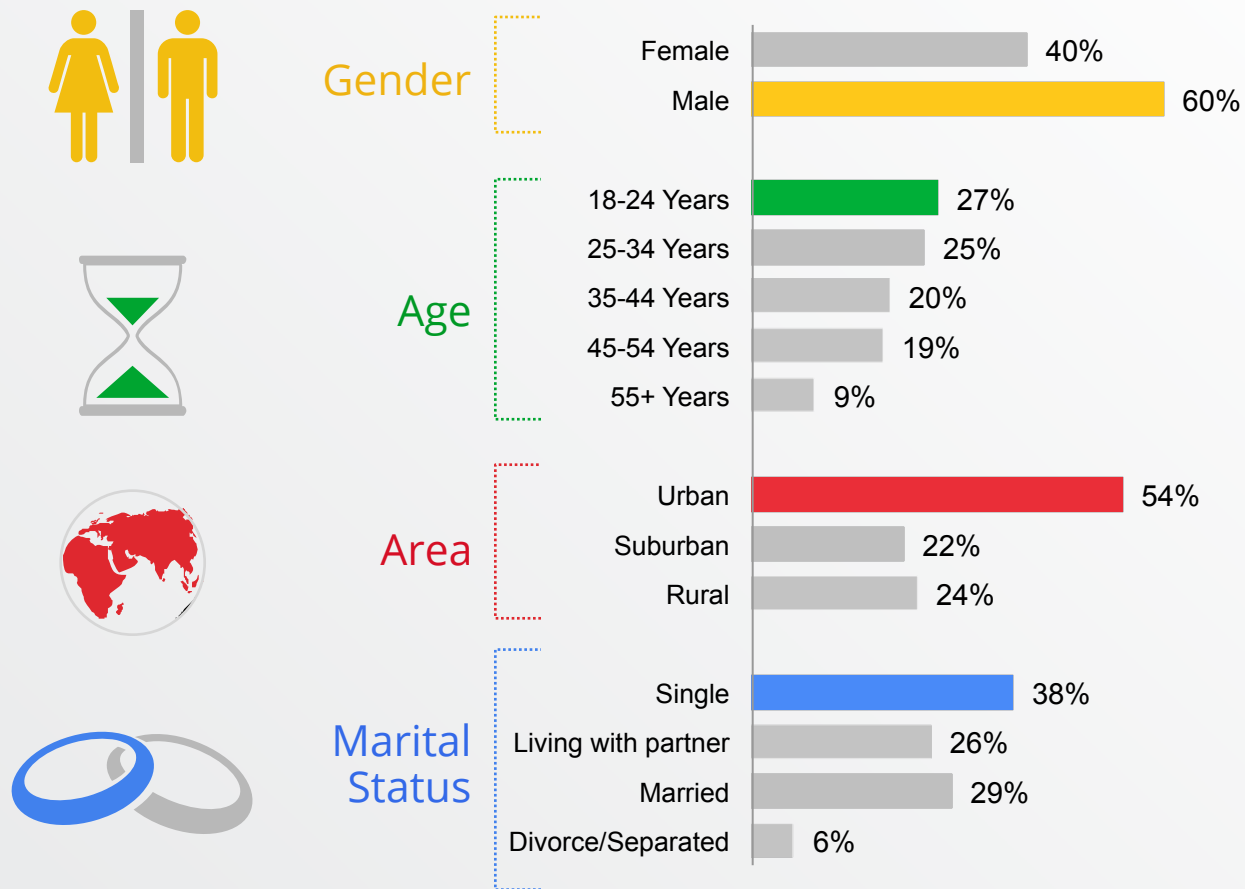
Background



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 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

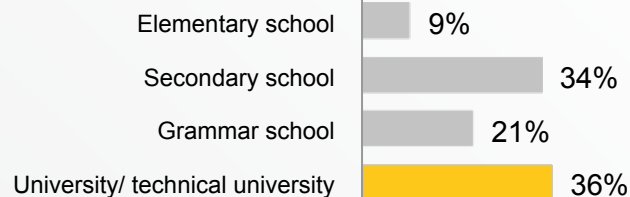
Demographics



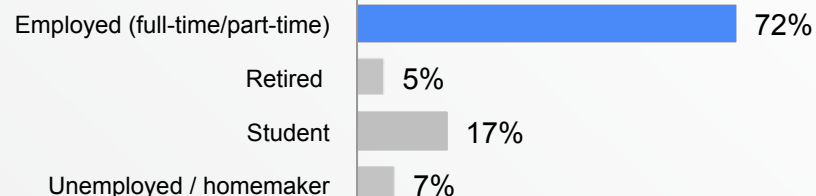
Demographics



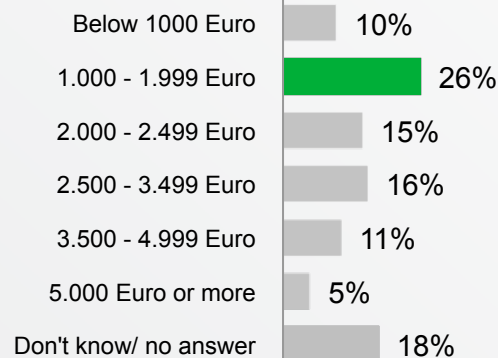
Education



Employment Status



Income



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

D4. What is the highest level of education 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 tax National Insurance (Social security) pension schemes etc.?