



# Our Mobile Planet: Global Smartphone Users

February 2012



**Ipsos OTX MediaCT**  
The Media, Content and Technology Research Specialists

# Agenda



## 1 General Smartphone Usage

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## 2 Mobile Local Usage

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## 3 Mobile Commerce

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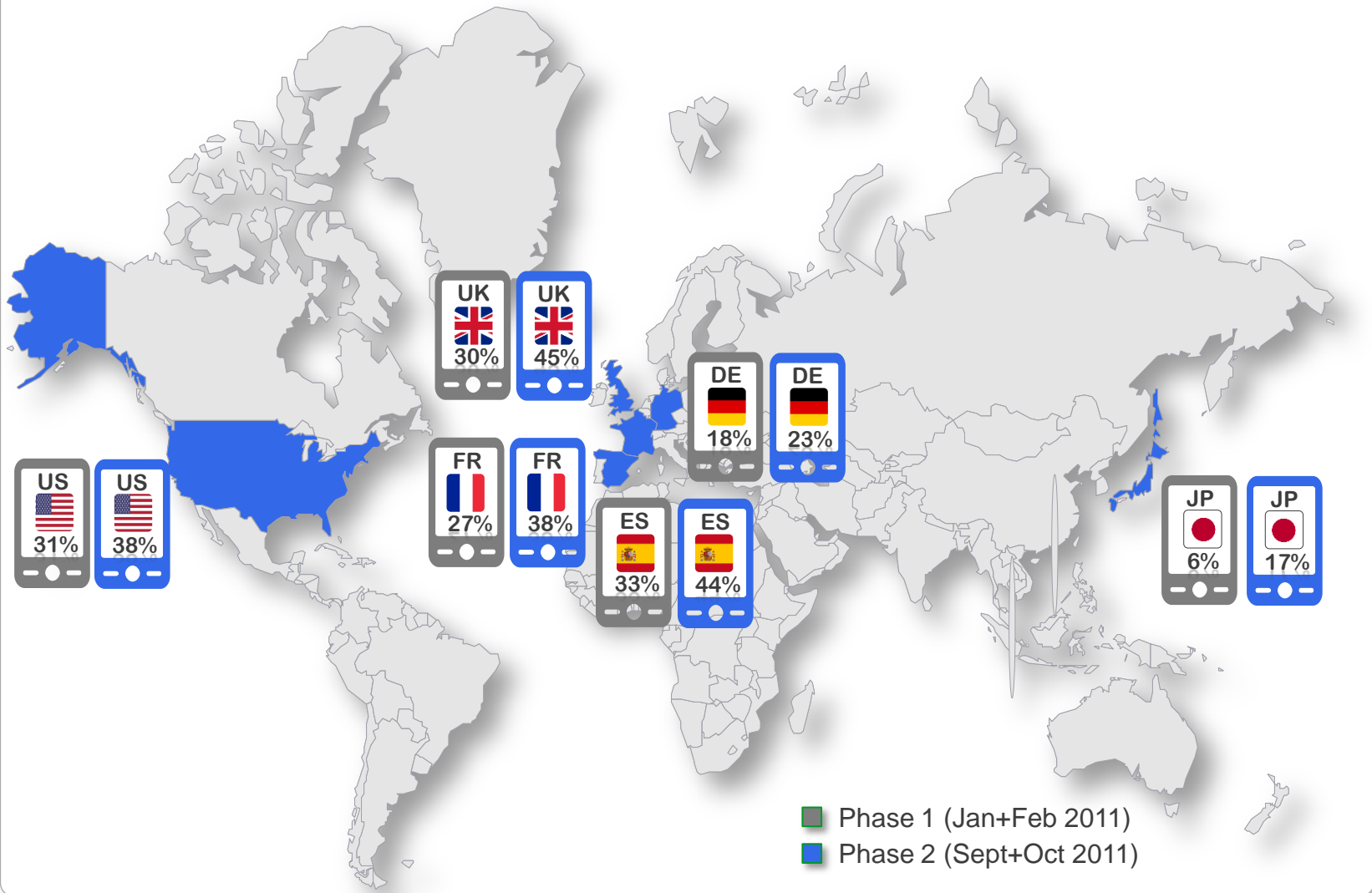
## 4 Background



# General Smartphone Usage

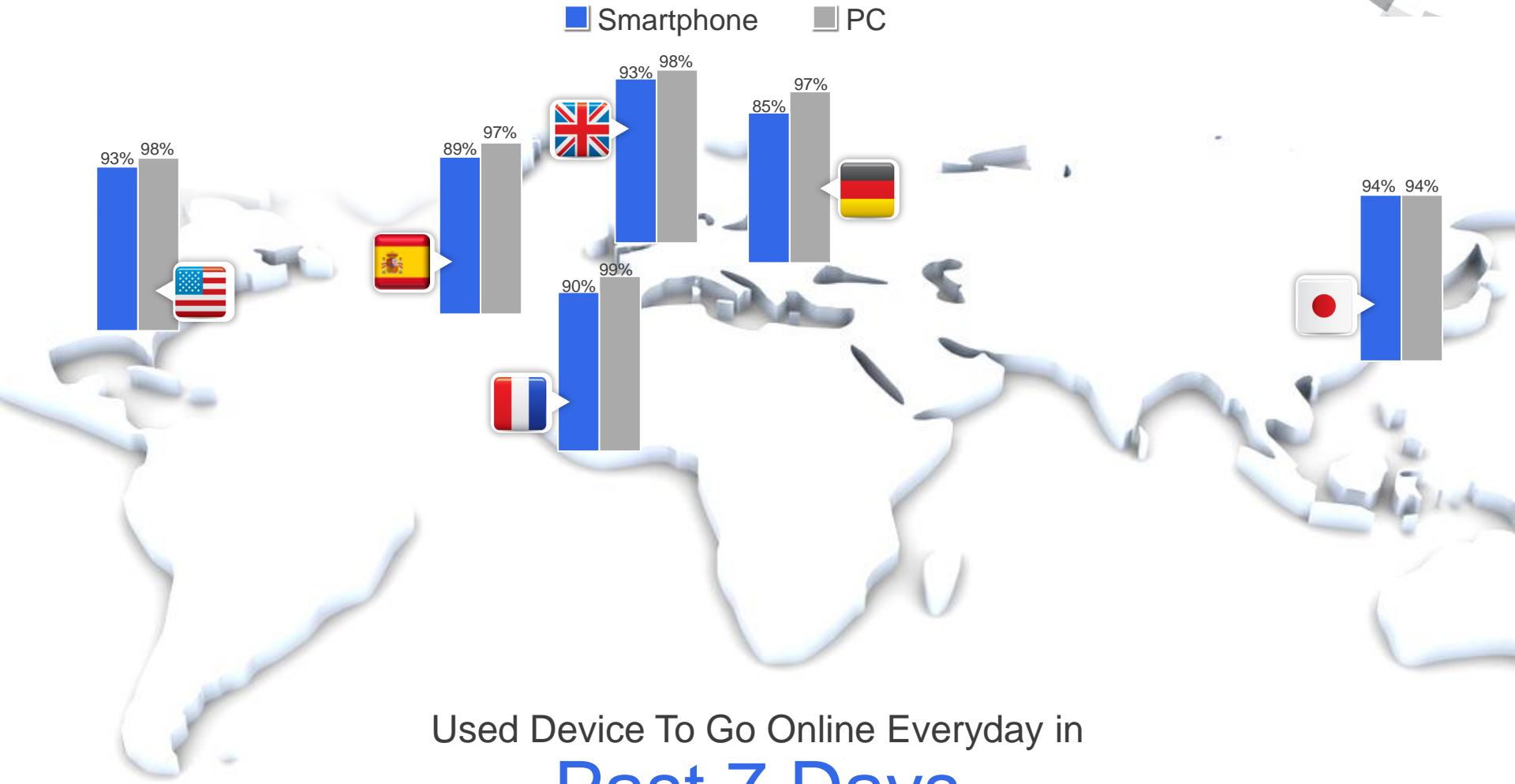
1

# Smartphone Ownership is on the Rise



Base: Enumeration Study I + II 2011: All respondents (UK: 2,000; US: 2,000; FR: 2,000; DE: 2,000; JP: 2,000).  
Q1. Which if any of the following devices do you currently use?  
Q6. And which of the following best describes your phones?

# Users are Accessing the Web Through Desktop, and Now Mobile



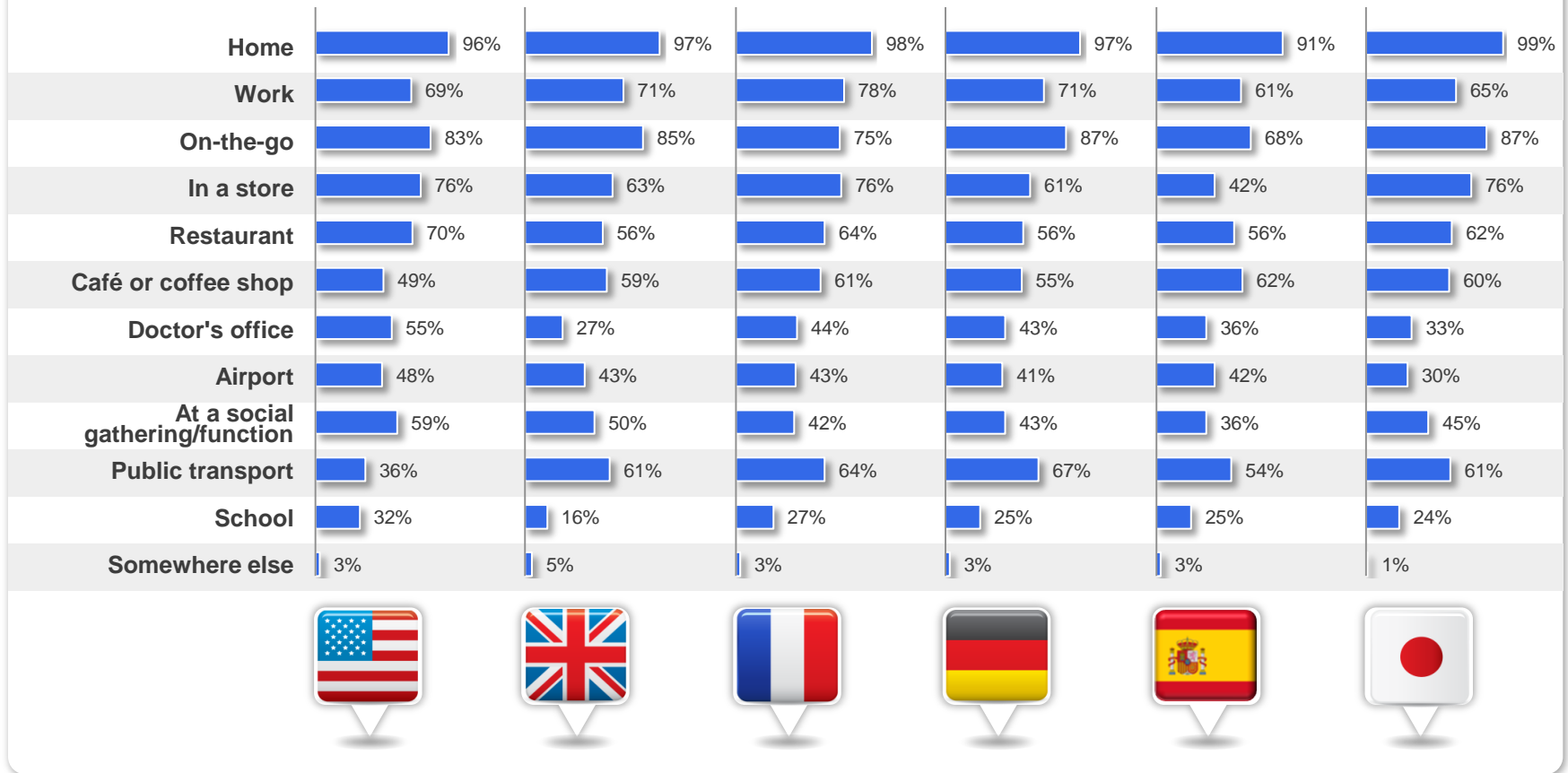
Used Device To Go Online Everyday in  
**Past 7 Days**

# Smartphones are Consumers' Always-on Companion



## Where Smartphone is Used

Ever used

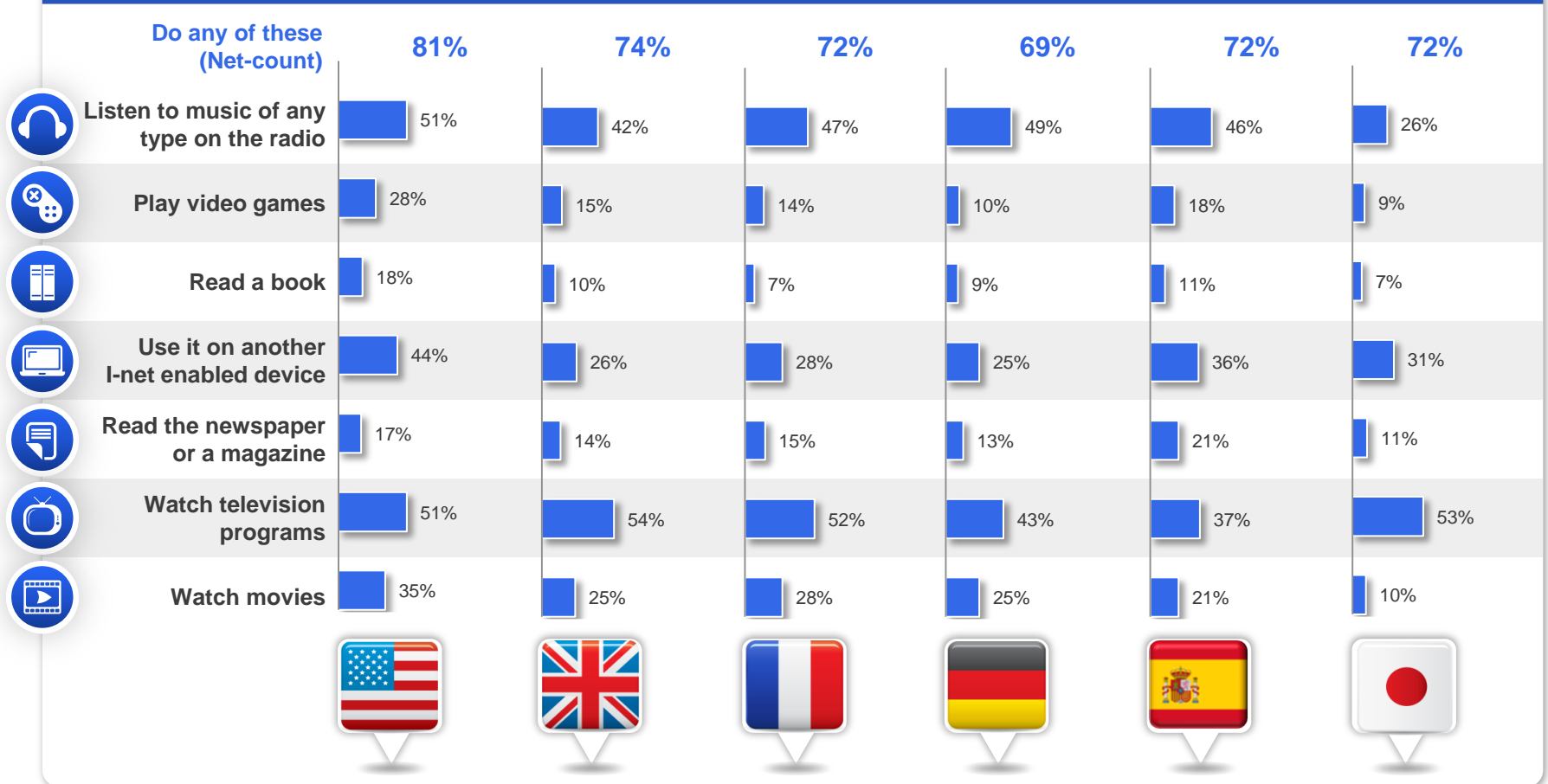


# Smartphones Are Used While Consuming Other Media



## Parallel media usage

At the Same Time when I Use my Smartphone I also...



Base: Private Smartphone users who use the internet in general and who were online yesterday with their Smartphone; wave 2 (US: 817; UK: 784; FR: 778; DE: 720; ES: 752; JP: 910).

Q22. When you use the Internet on your Smartphone which if any of the following - do you do at the same time?

# Offline Media Influences Mobile Search



## Search After Ad Awareness

Ever searched in response to any of these (Net-count)

66%

55%

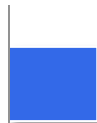
46%

58%

68%

62%

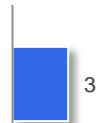
Shop/business



57%



44%



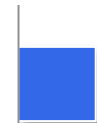
36%



49%



59%

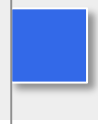


50%

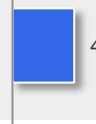
TV



58%



49%



40%



52%



62%



53%

Magazine



46%



39%



34%



49%



55%



42%

Poster



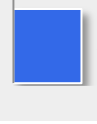
36%



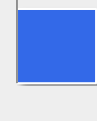
33%



34%



44%



51%



35%



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?

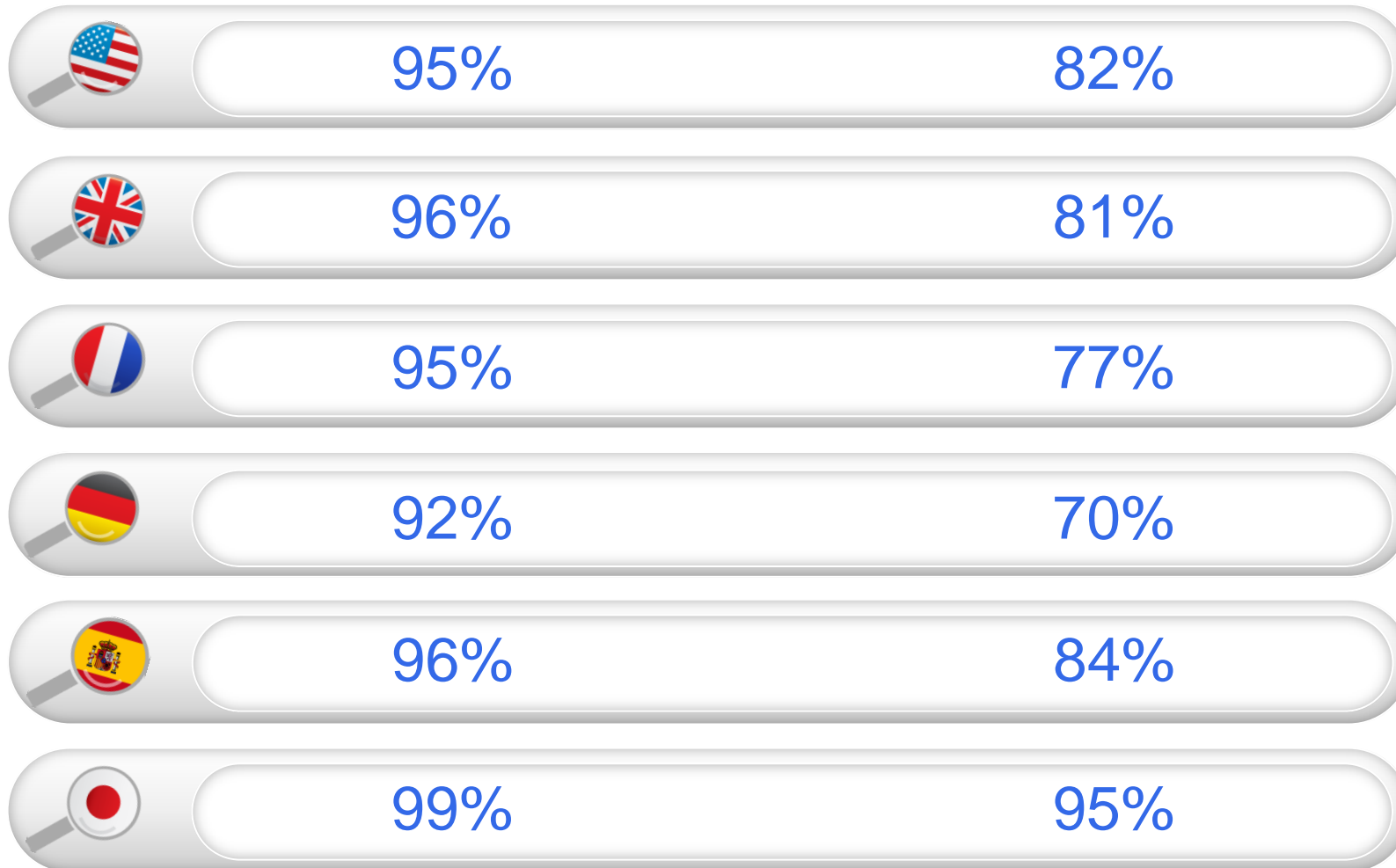


# Search Engines Are a Frequent Touchpoint



Usage of search engines  
on Smartphone in general

Usage of search engines  
on Smartphone once a week or more



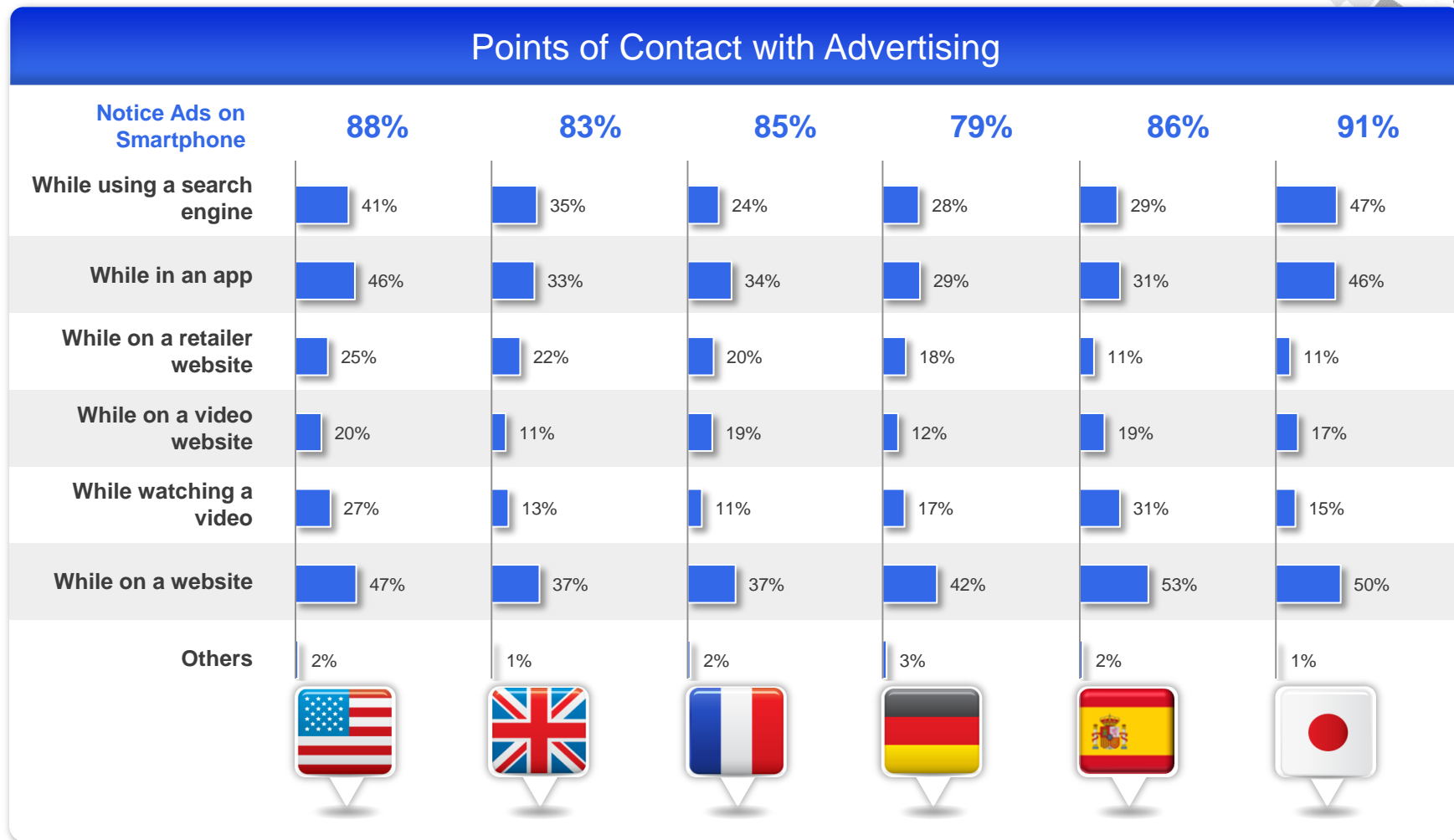
Base: Private Smartphone users who use the internet in general (US: 1000; UK: 1000; FR: 1000; DE: 1000; ES: 1000; JP: 1000).

Q29. 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).

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 (US: 1,000 (963); UK: 1,000 (954); FR: 1,000 (971); DE: 1,000 (938); ES: 1,000 (991); JP: 1,000 (992)).

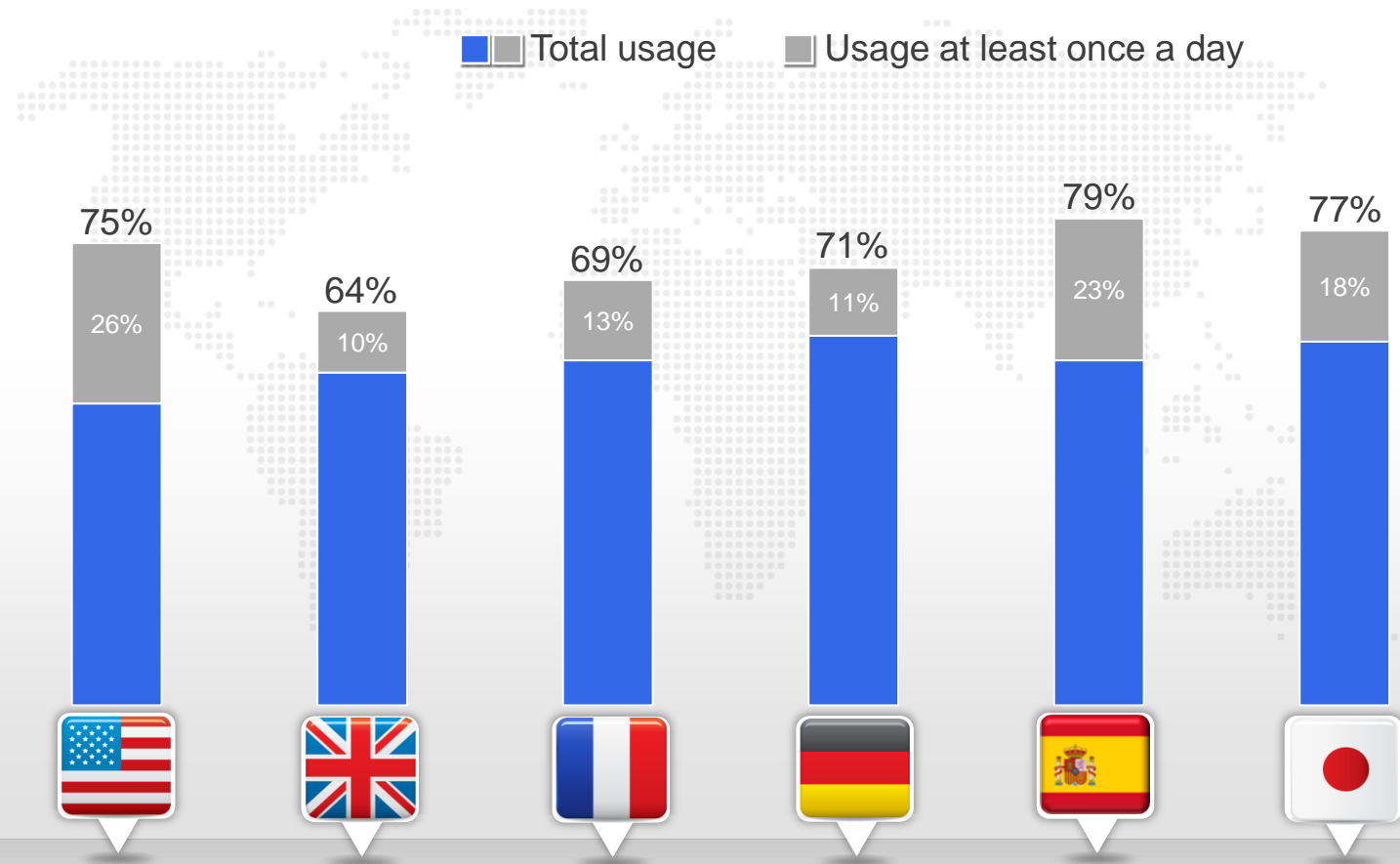
Q26. And of the apps you currently have installed on your Smartphone how many have you purchased for a certain amount in an app store?

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

# Smartphone Users Are Avid Video Watchers



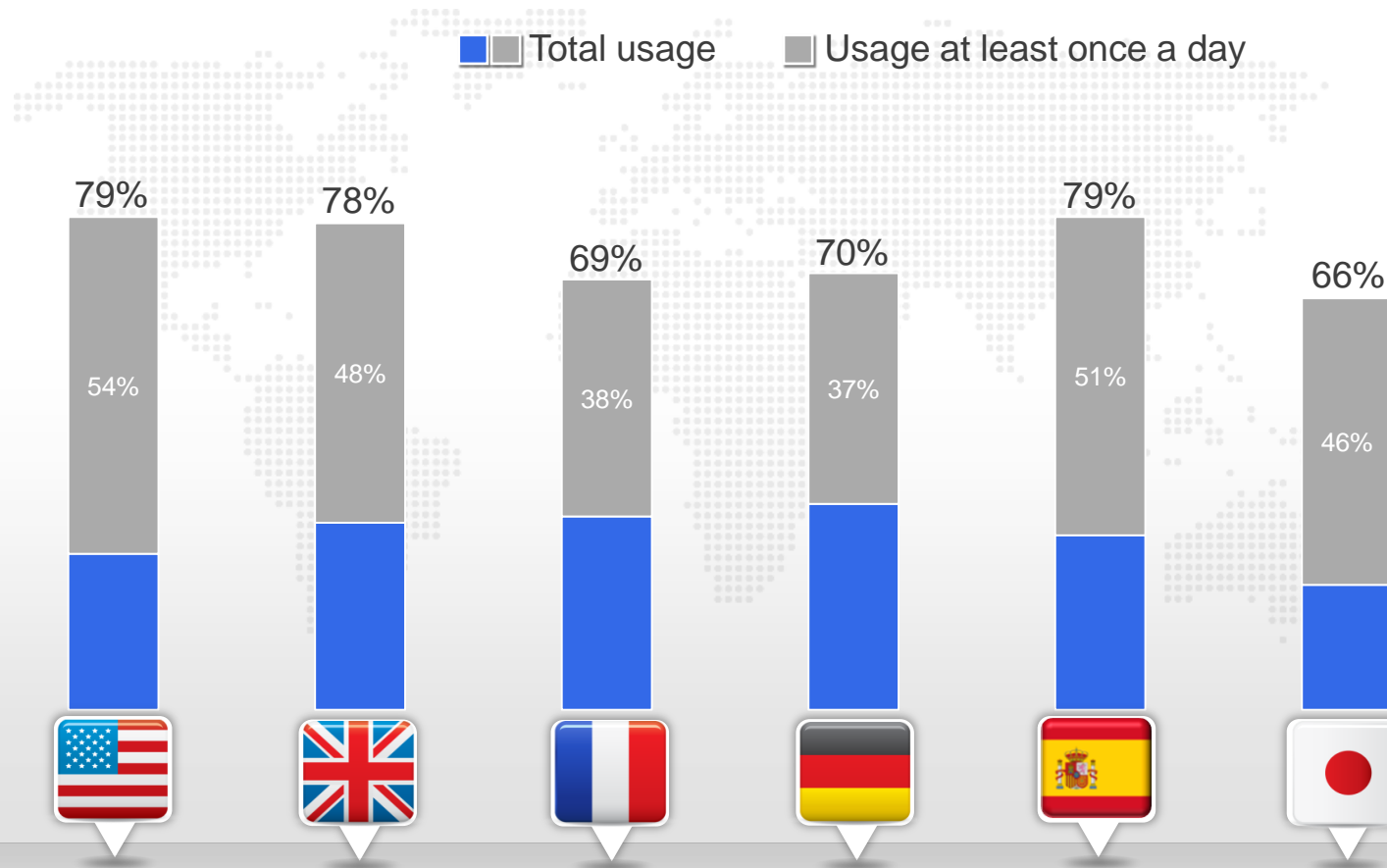
## Online Video Consumption



# Smartphone Users Are Frequent Social Networkers



## Social Media Usage

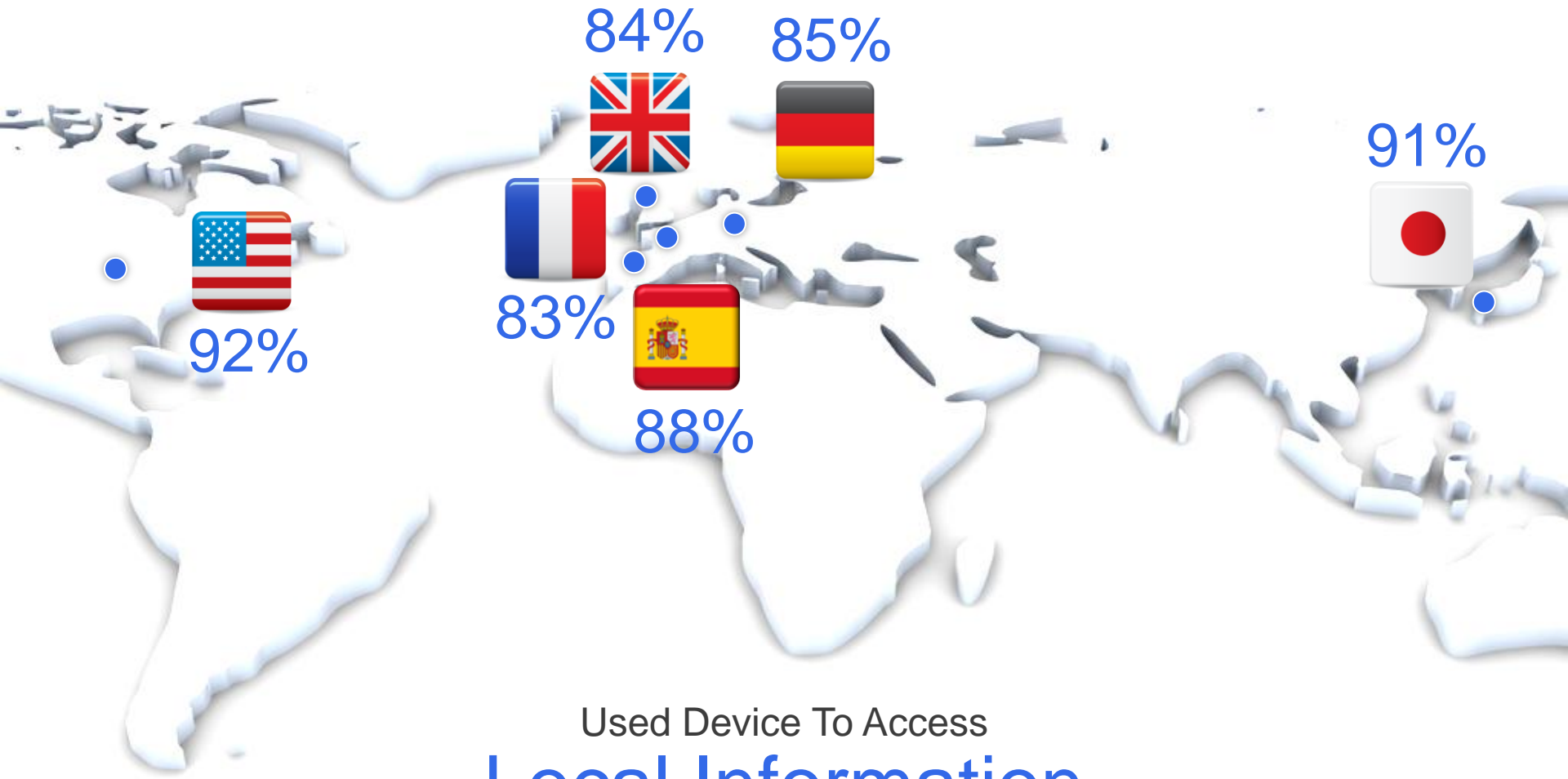




# Mobile Local Usage

# 2

# Smartphone Users Seek Local Information

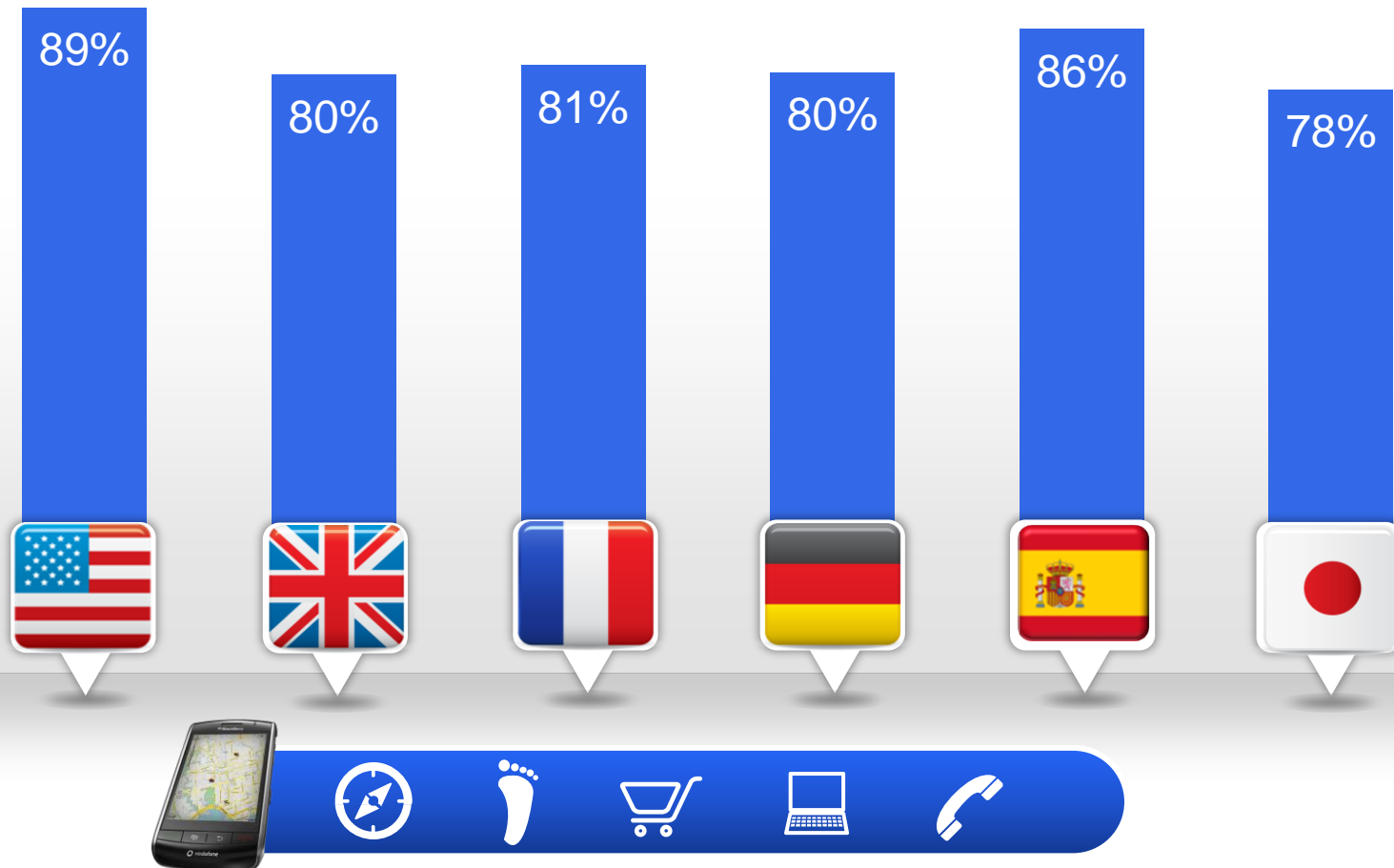


Used Device To Access  
**Local Information**

# ...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).

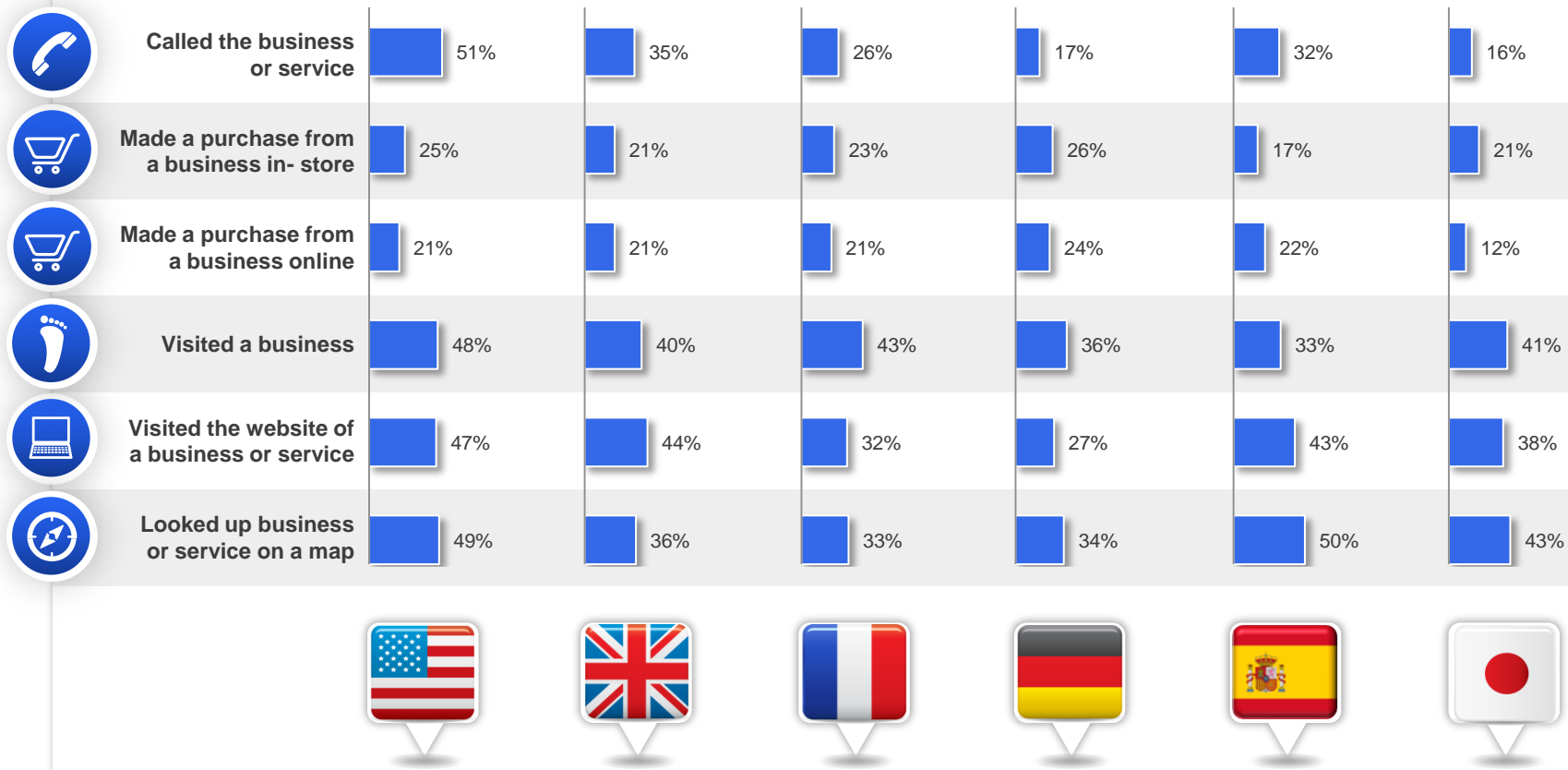
Q34. Which of the following actions have you taken after having looked up this type of information (business or services close to your location)?



# 1 in 5 Make a Purchase after Looking for Local Info



## Actions Taken After Looking for Local Info





# Mobile Commerce

# 3

# Mobile Is an Emerging Point of Purchase



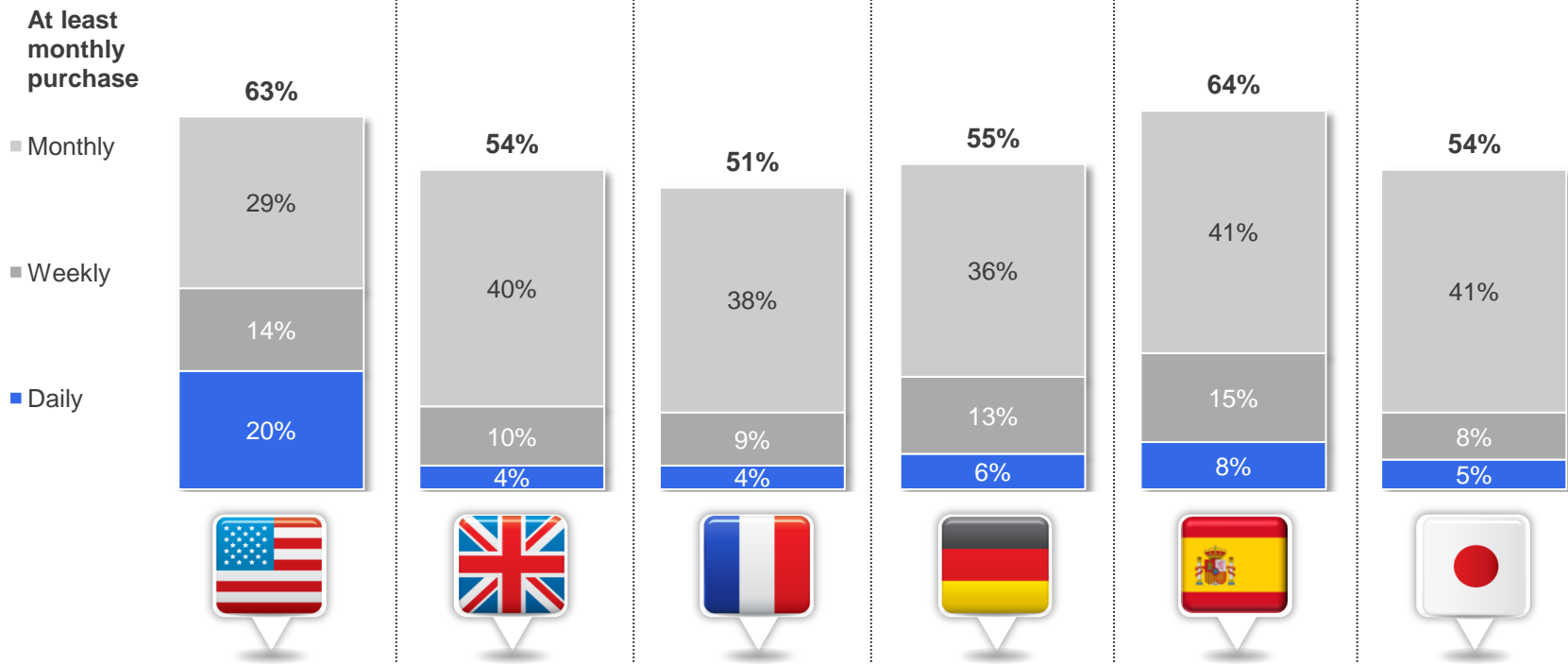
Have Purchased on Smartphone



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



## Frequency of Mobile Purchase



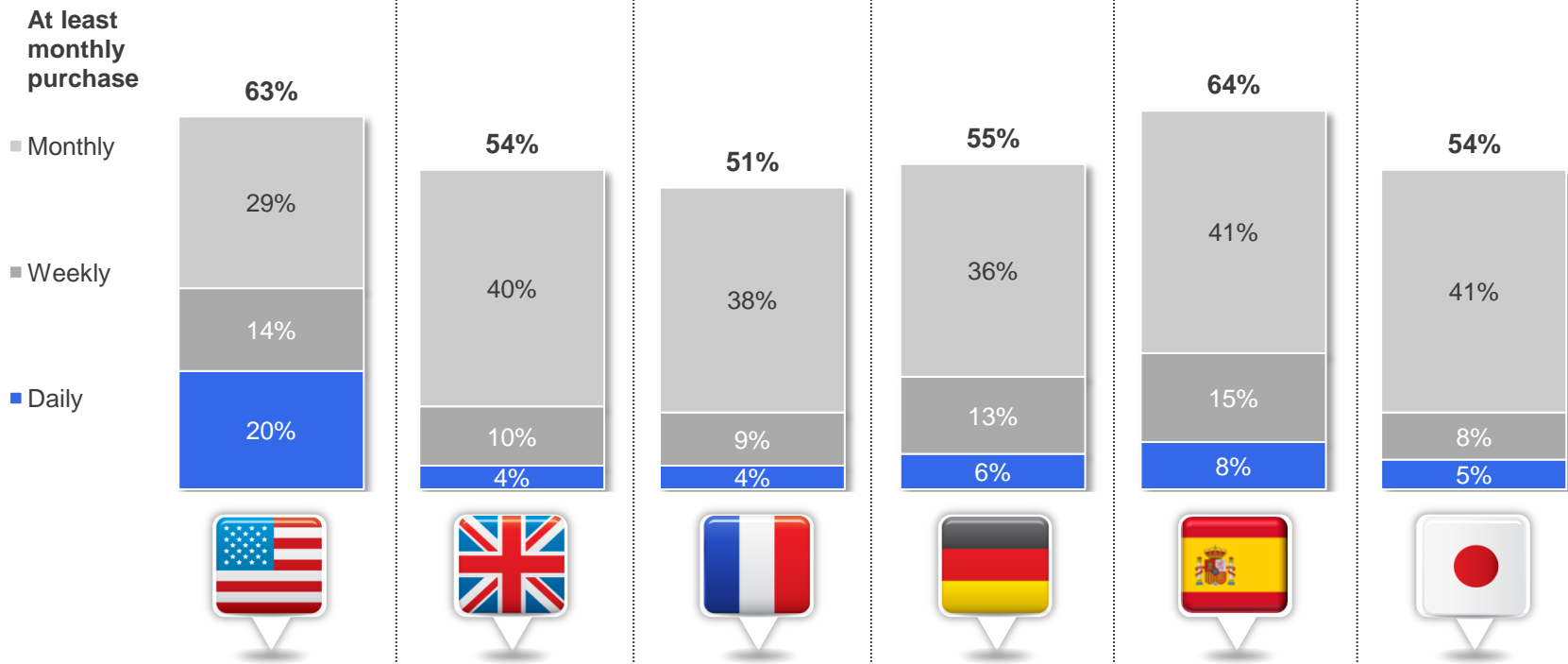
Base: Private smartphone users who use the internet in general and who purchased via internet on their smartphone wave 2 (US: 336; UK: 304; FR: 240; DE: 271; ES: 242; JP: 400).

Q47. How frequently do you purchase products or services with your smartphone?

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



## Frequency of Mobile Purchase



Base: Private smartphone users who use the internet in general and who purchased via internet on their smartphone wave 2 (US: 336; UK: 304; FR: 240; DE: 271; ES: 242; JP: 400).

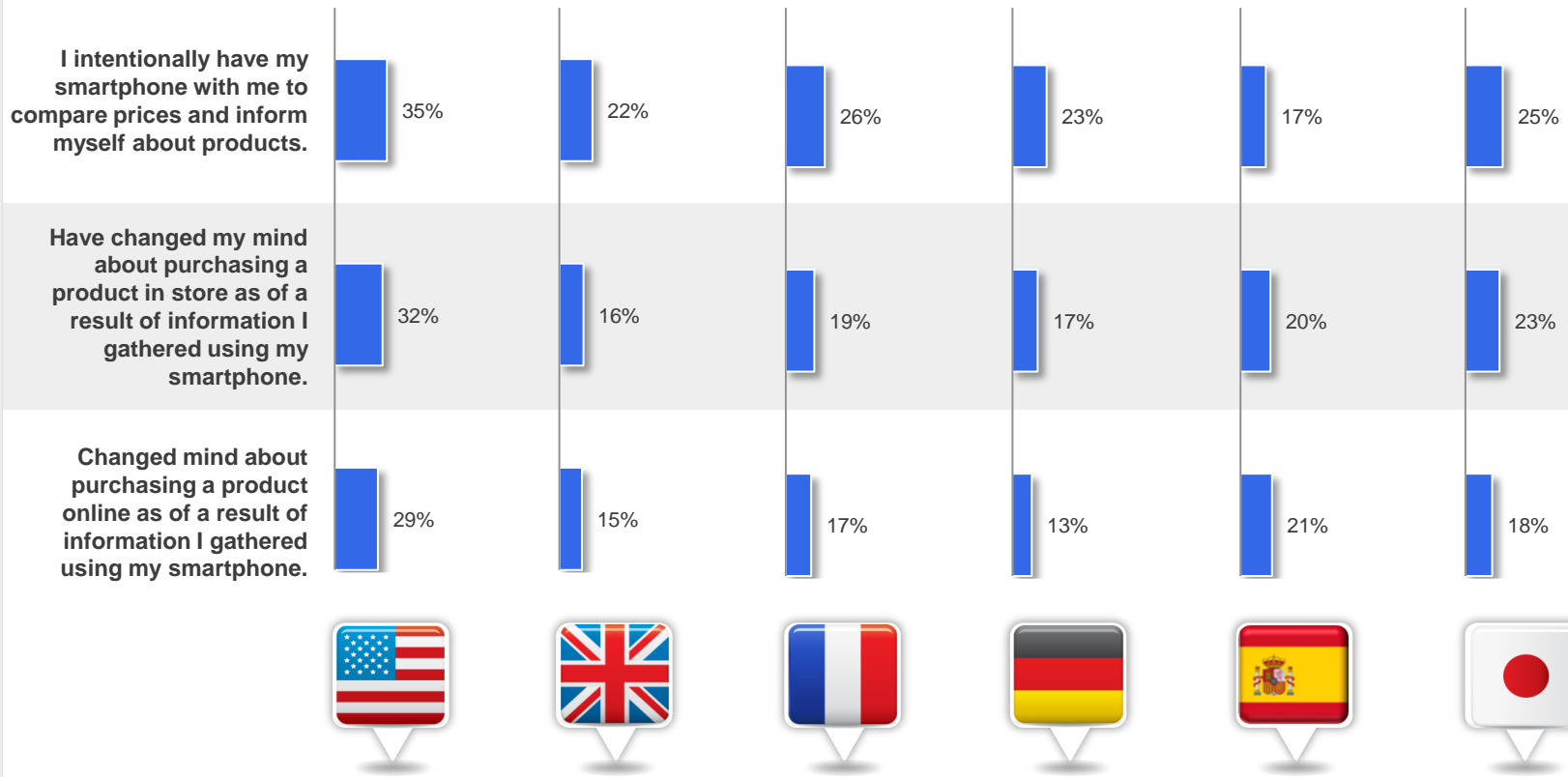
Q47. How frequently do you purchase products or services with your smartphone?

# Smartphones Influence Consumer Purchase Decisions



## Relevance of Smartphone

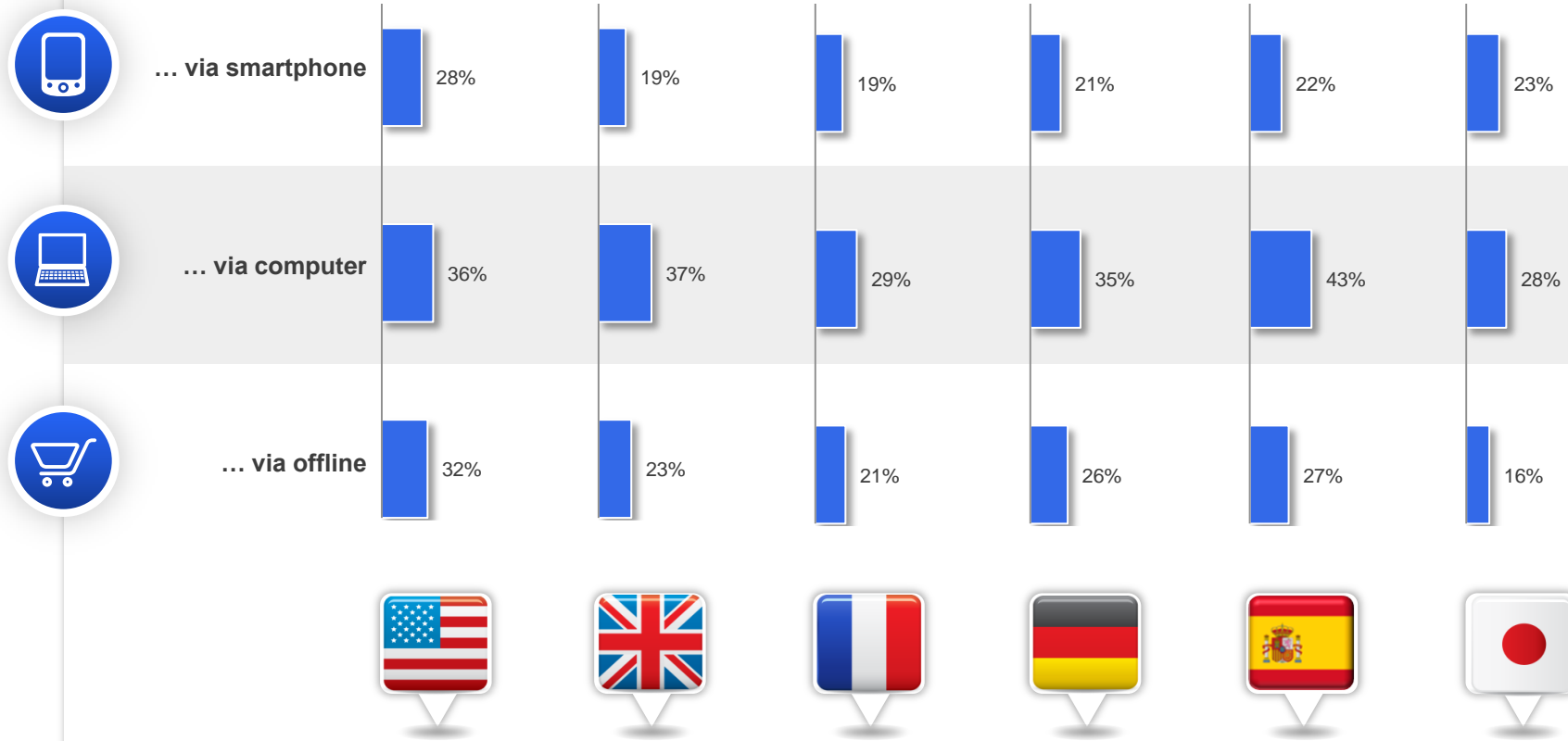
### Relevance smartphone for shopping (Top2)



# Smartphone Research Also Leads to Purchase Online and In-store



## Researched via Smartphone and Purchased...





# Background

# 4



# 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%



# Demographics 1/2



## Marital 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%

## Employment Status

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%



# 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

