



Our Mobile Planet: Global Smartphone Users

February 2012

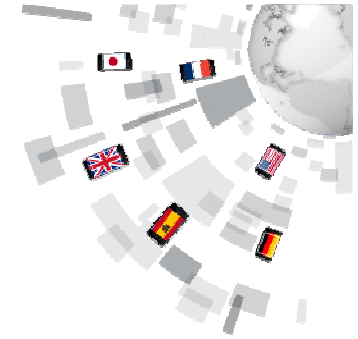


Ipsos OTX MediaCT
The Media, Content and Technology Research Specialists



Google Confidential and Proprietary

Agenda



1 General Smartphone Usage

2 Mobile Local Usage

3 Mobile Commerce

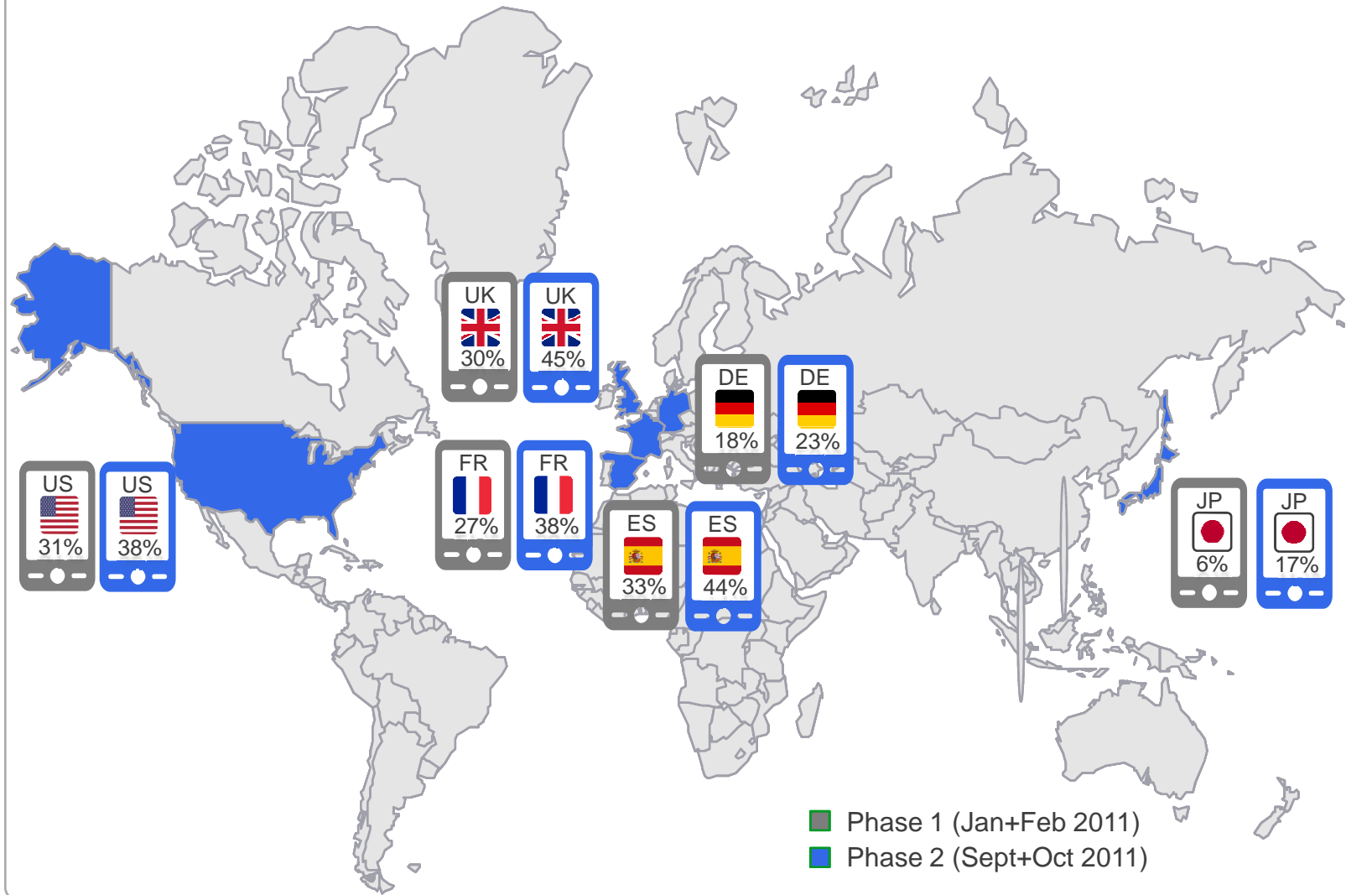
4 Background



General Smartphone Usage

1

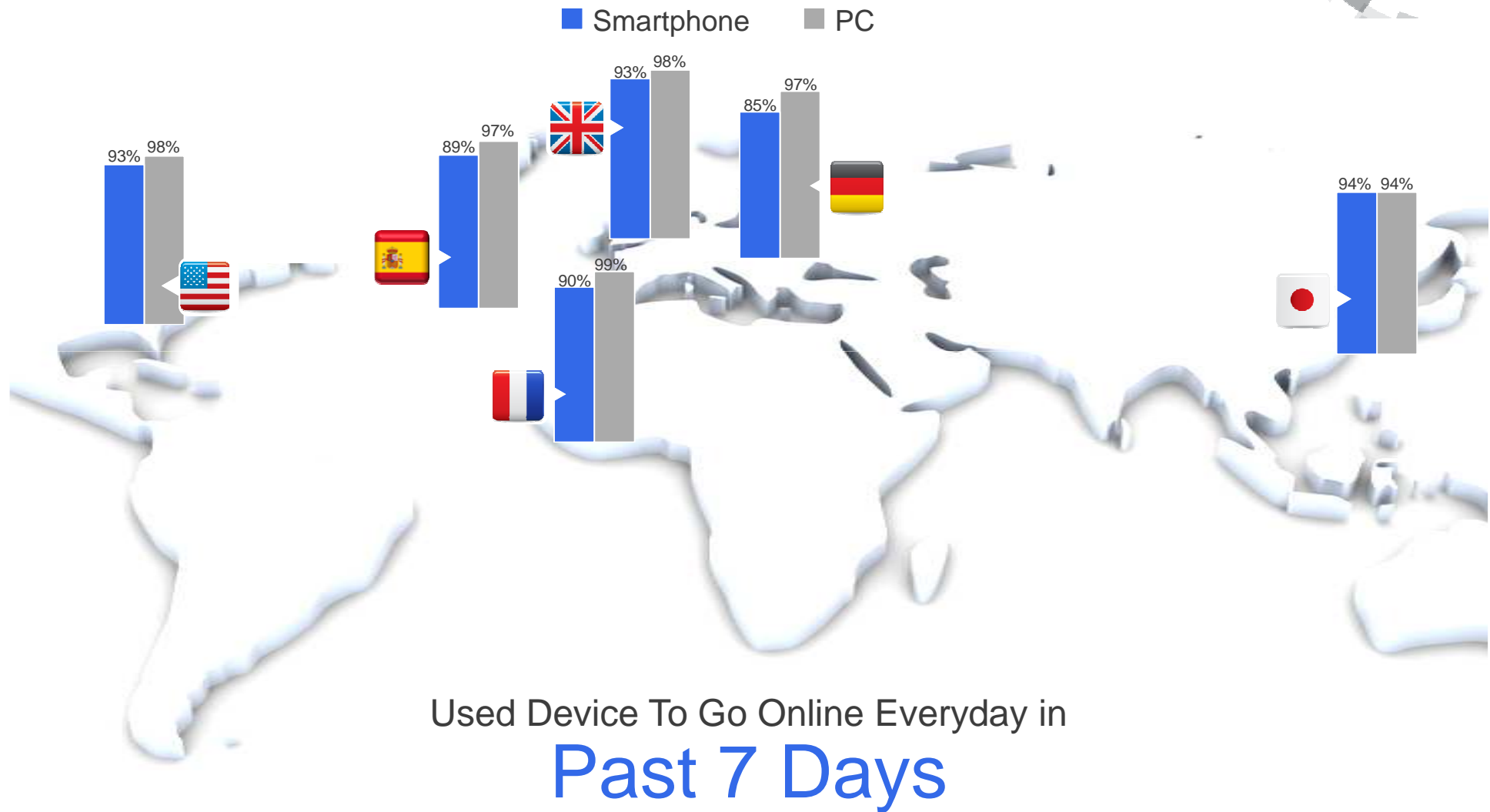
Smartphone Ownership is on the Rise



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?

Google Confidential and Proprietary

Users are Accessing the Web Through Desktop, and Now Mobile

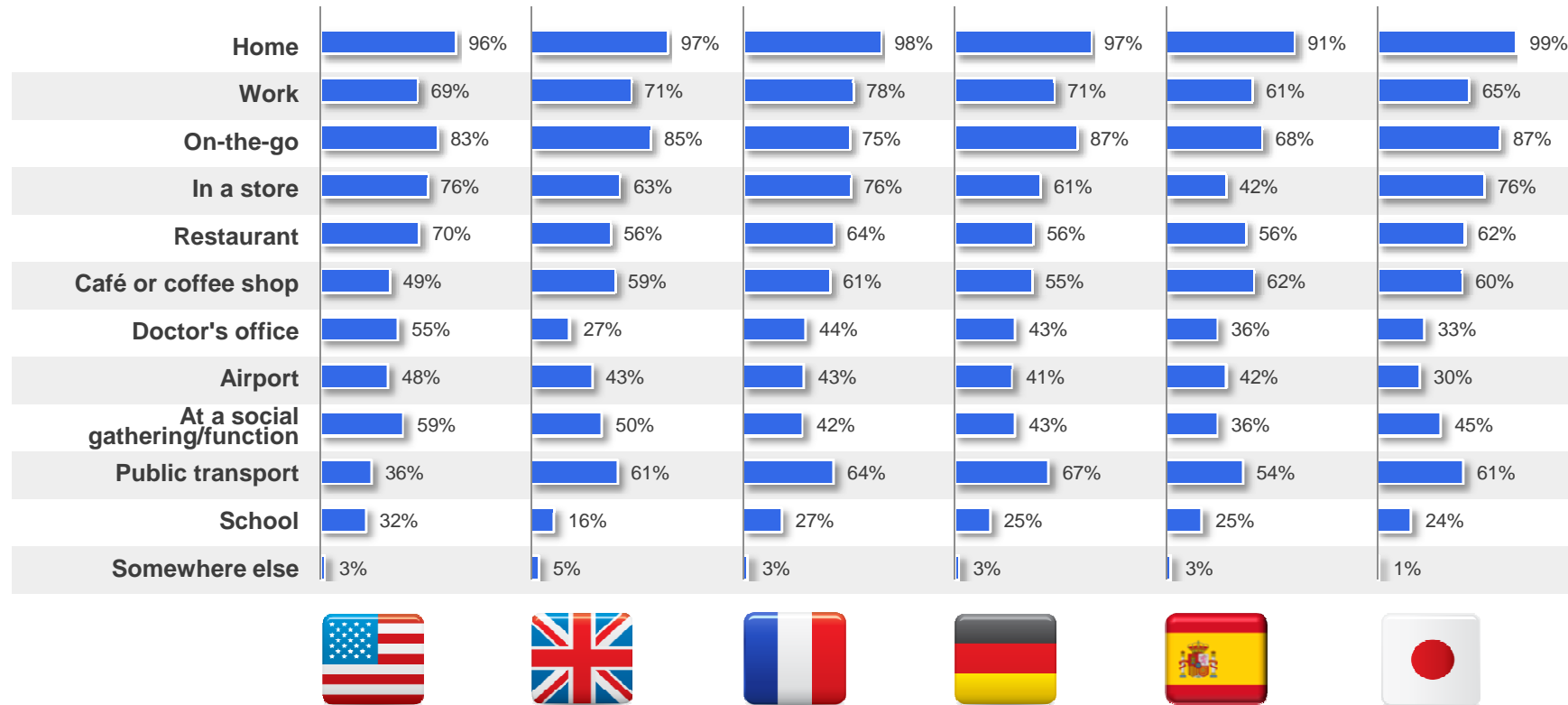


Smartphones are Consumers' Always-on Companion



Where Smartphone is Used

Ever used

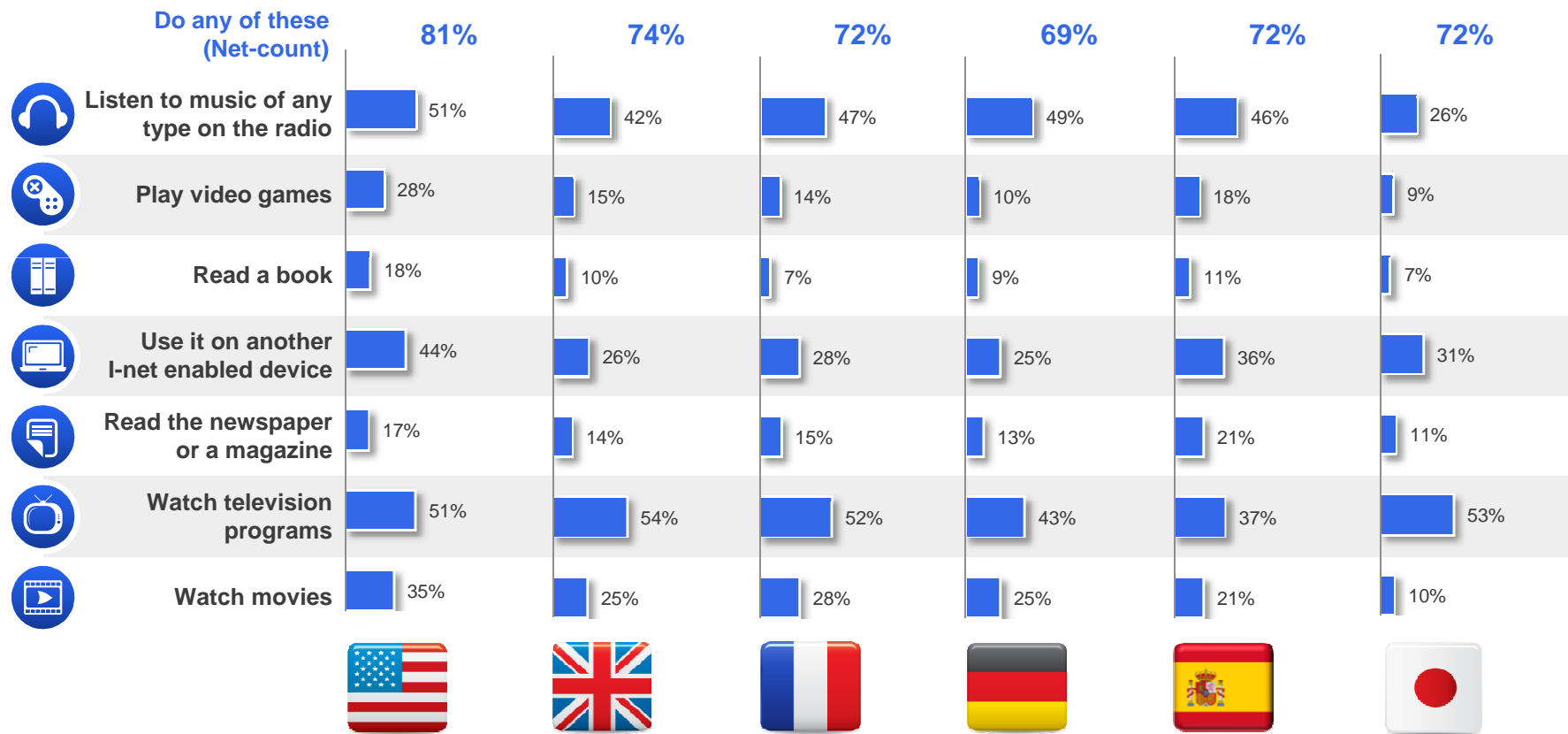


Smartphones Are Used While Consuming Other Media



Parallel media usage

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



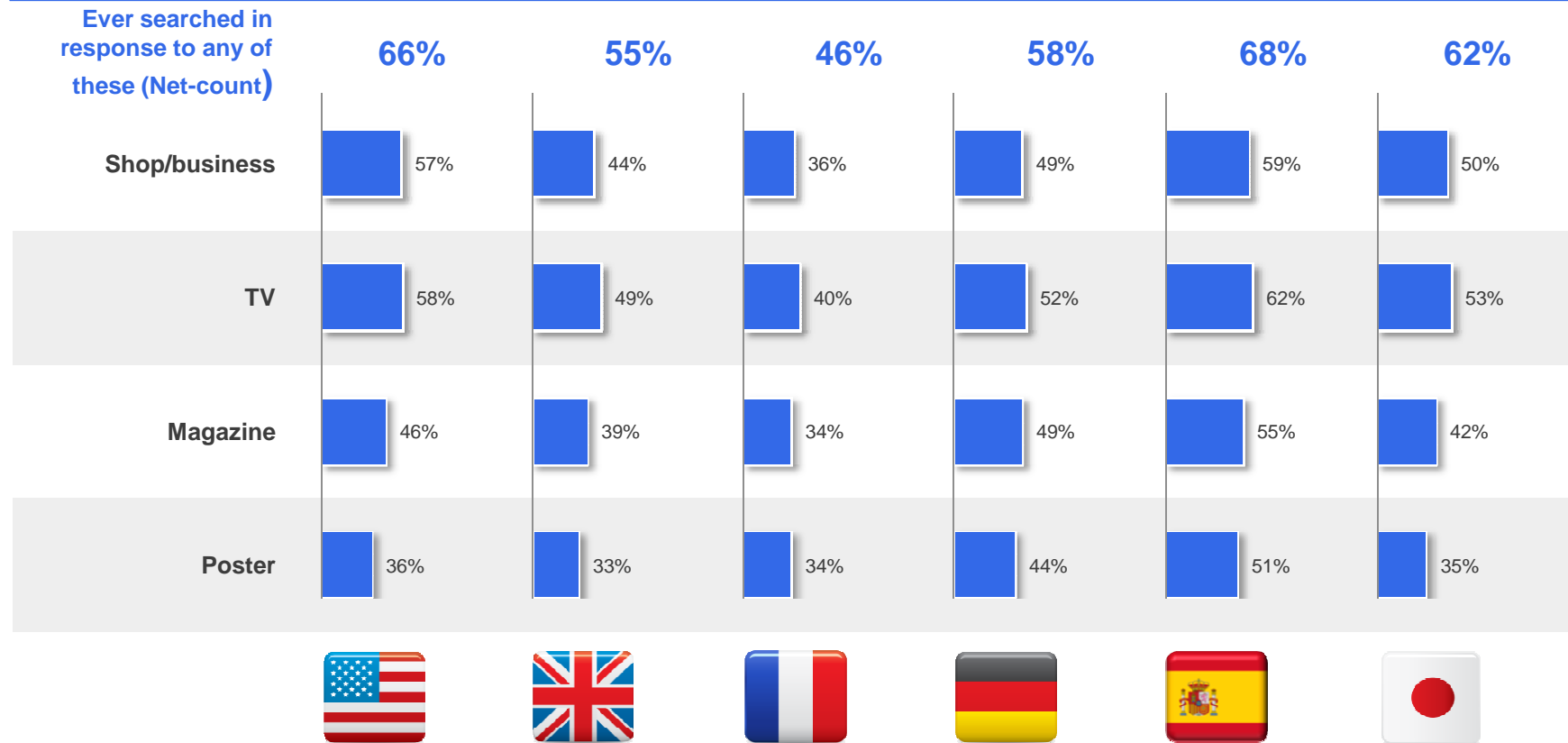
Base: Private Smartphone users who use the internet in general and who were online yesterday with their Smartphone; wave 2 (US: 817; UK: 784; FR: 778; DE: 720; ES: 752; JP: 910).

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



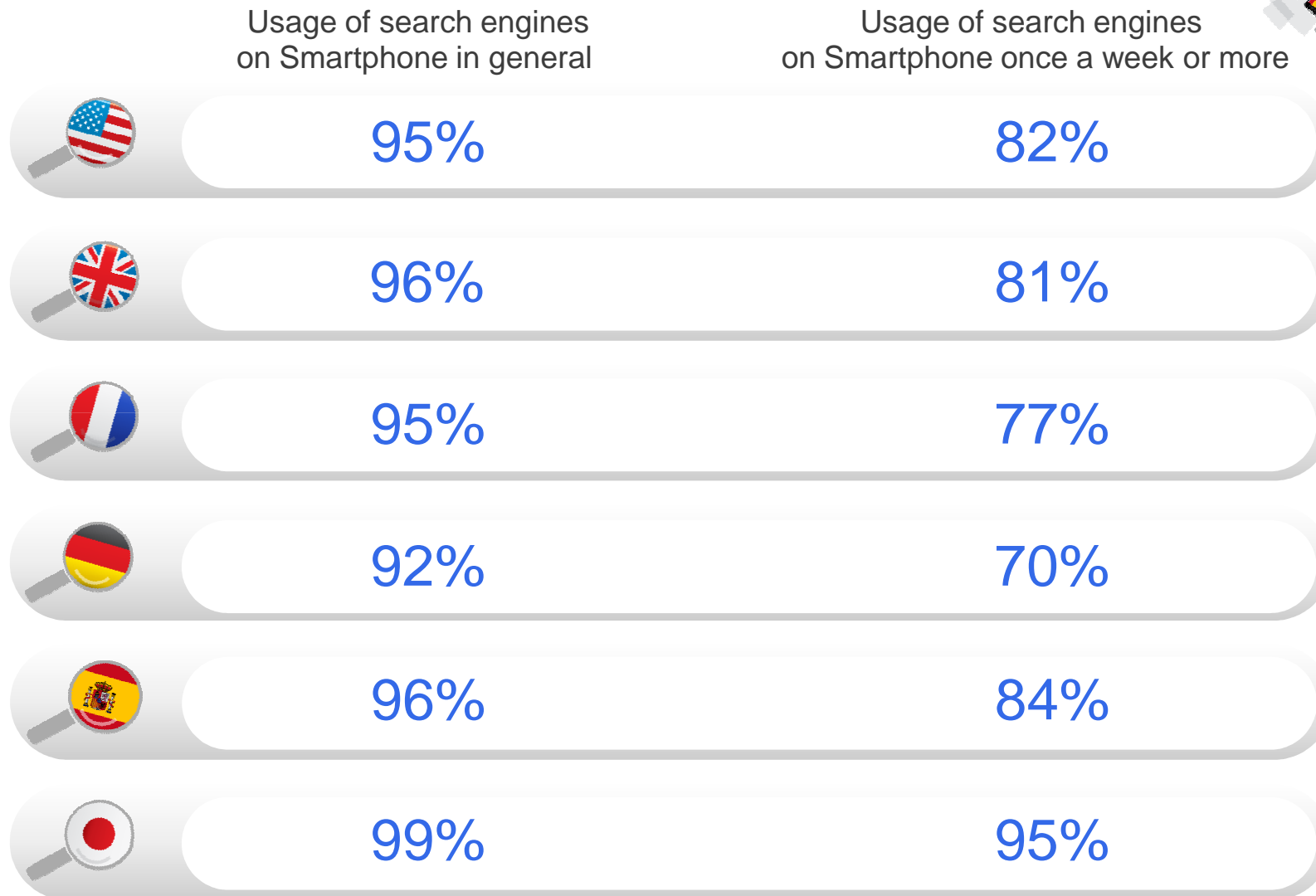
Search After Ad Awareness



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



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 ... ?

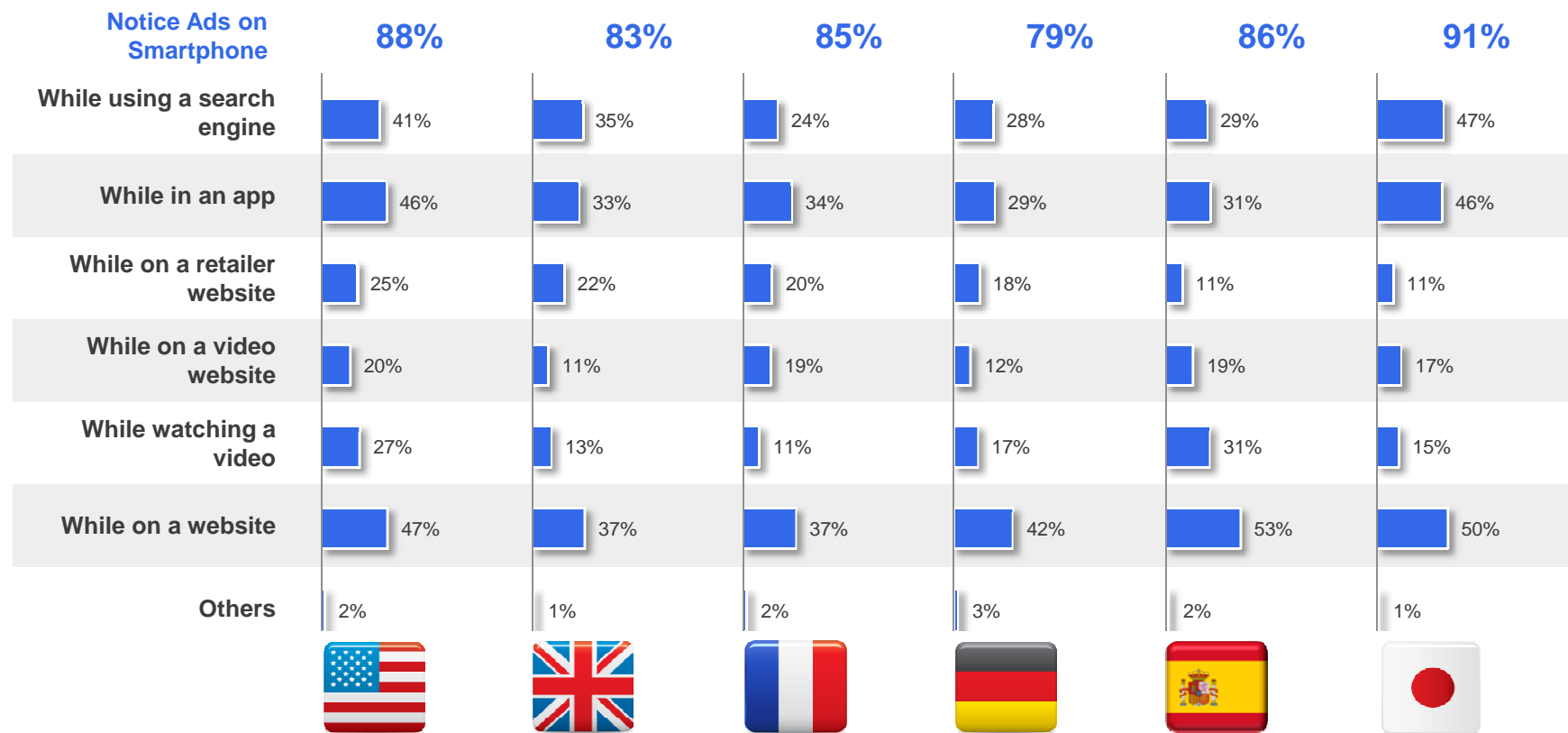
Base: Private Smartphone users who use the internet in general and who are searching via search engine (US: 954; UK: 959; FR: 951; DE: 919; ES: 960; JP: 986).

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

Smartphone Users Notice Mobile Ads



Points of Contact with Advertising



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?

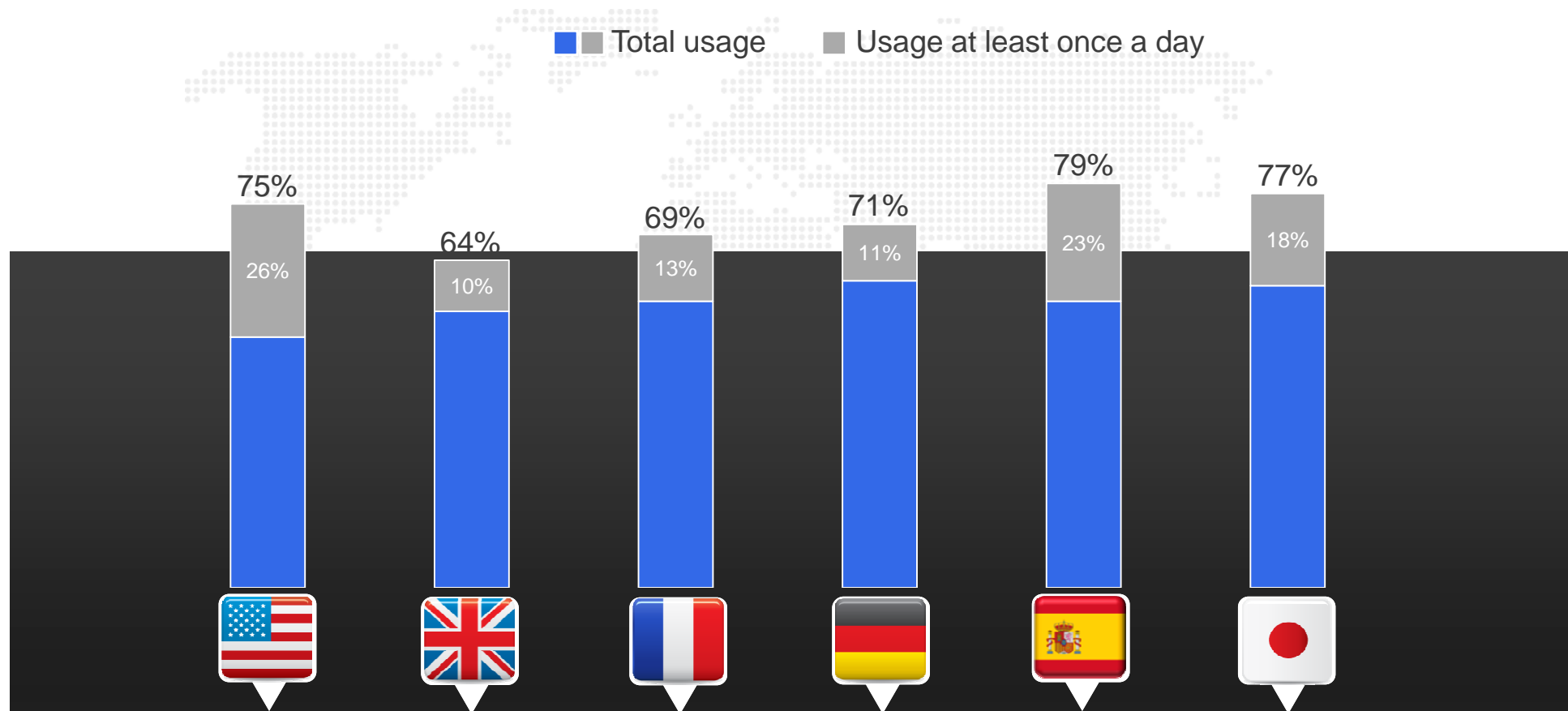
Google Confidential and

11

Smartphone Users Are Avid Video Watchers



Online Video Consumption

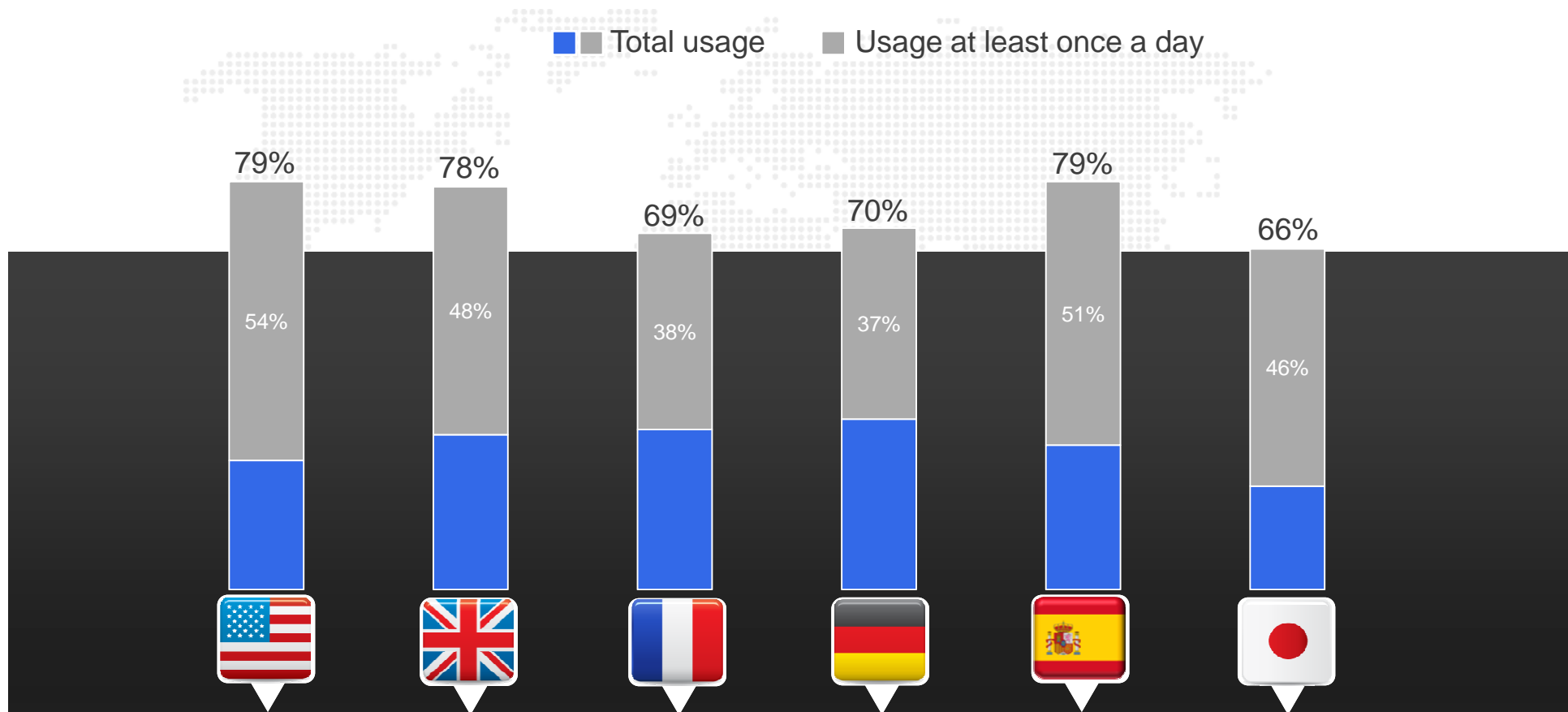


Base: Private Smartphone users who use the internet in general, wave 2 (US: 1.000; UK: 1.000; FR: 1.000; DE: 1.000; ES: 1.000; JP: 1.000).
Q38. How often do you visit a social network (via websites or apps) on your...?

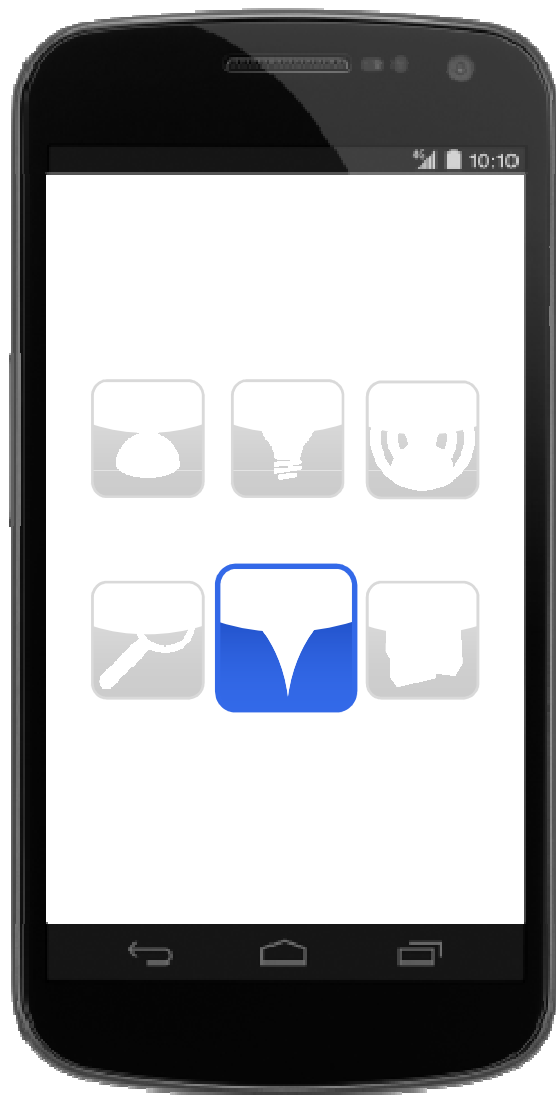
Smartphone Users Are Frequent Social Networkers



Social Media Usage



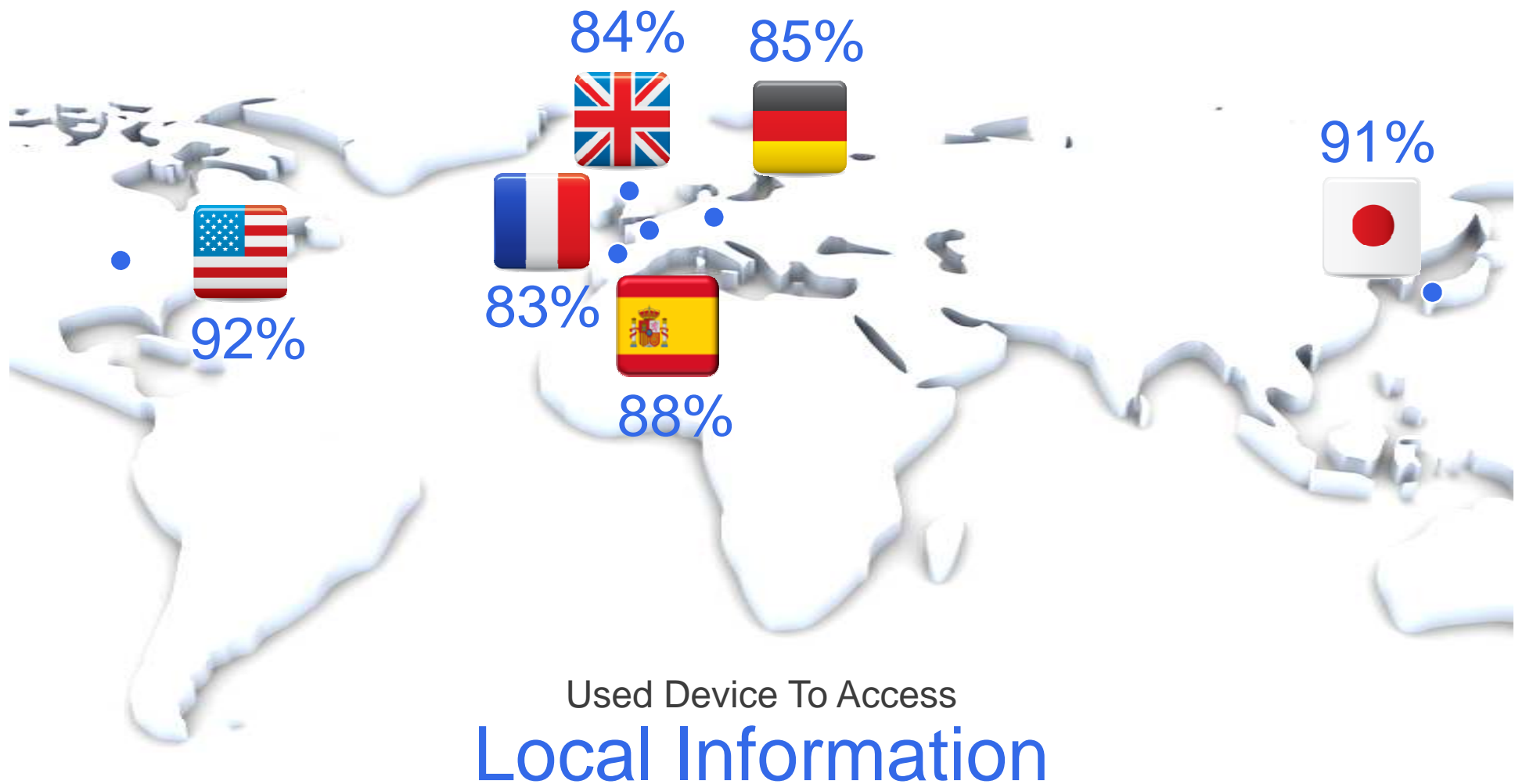
Base: Private Smartphone users who use the internet in general, wave 2 (US: 1.000; UK: 1.000; FR: 1.000; DE: 1.000; ES: 1.000; JP: 1.000).
Q38. How often do you visit a social network (via websites or apps) on your...?



Mobile Local Usage

2

Smartphone Users Seek Local Information

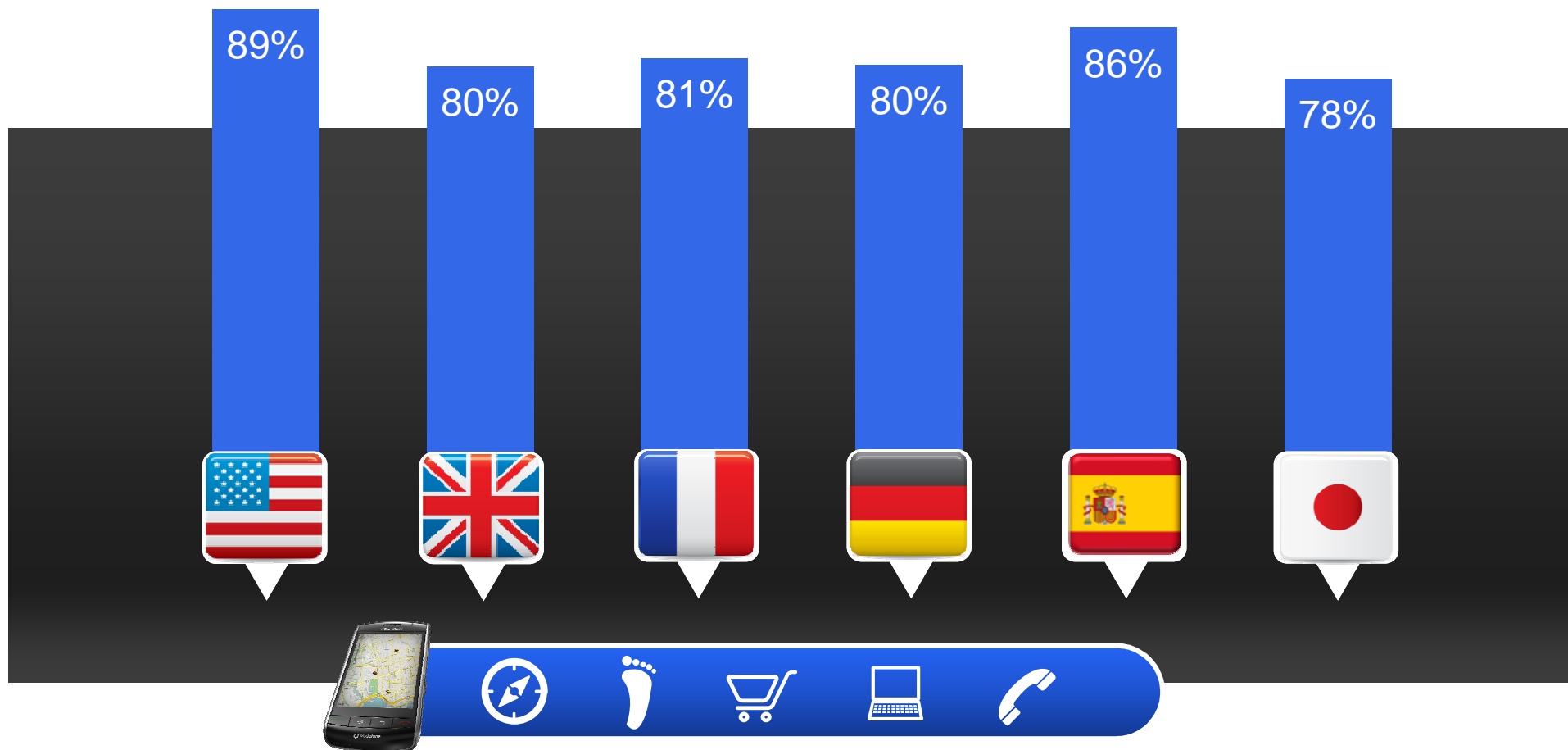


Base: Private Smartphone users who use the internet in general (US: 1.000; UK: 1.000; FR: 1.000; DE: 1.000; ES: 1.000; JP: 1.000).
Q33. How often do you look for information about local businesses or services on your Smartphone? Think about any information you may access in your immediate location, in your home area, while traveling, etc.

...And, These Local Information Seekers Take Action



Have Taken Action After Looking Up Local Content

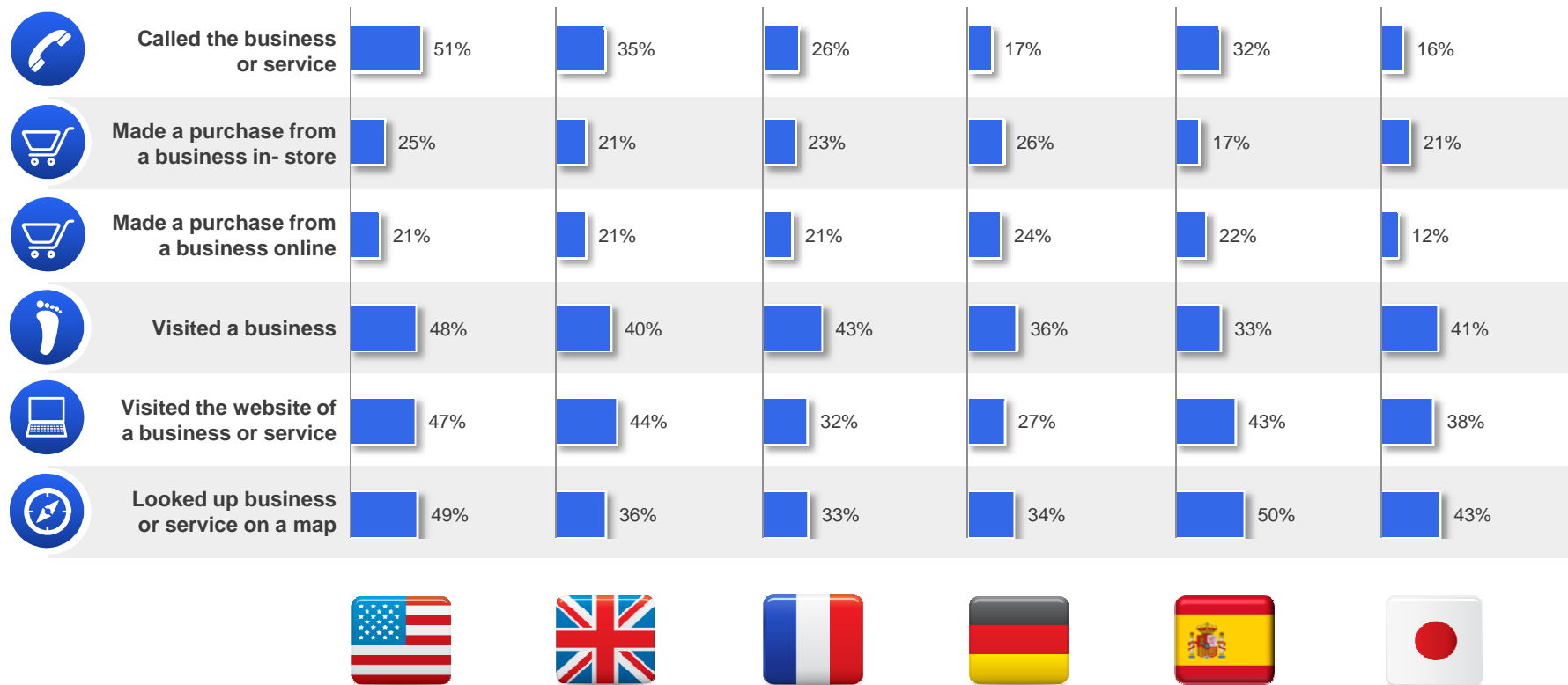


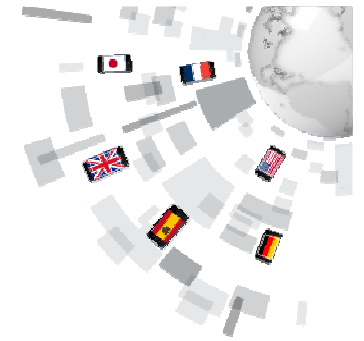
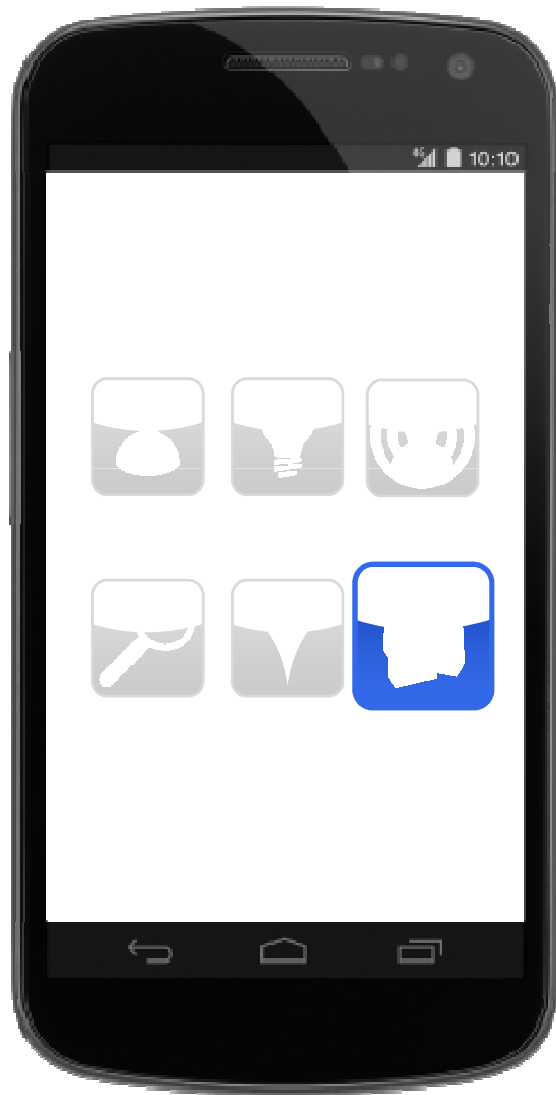
Base: Private Smartphone users who use the internet in general and who look at least less than once a month for information on their Smartphone; wave 2 (US: 920; UK: 840; FR: 834; DE: 852; ES: 885; JP: 913).
Q34. Which of the following actions have you taken after having looked up this type of information (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

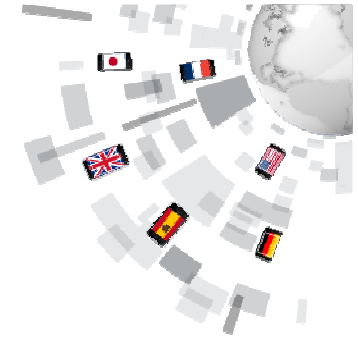




Mobile Commerce

3

Mobile Is an Emerging Point of Purchase



Have Purchased on Smartphone

40%

34%

30%

27%

24%

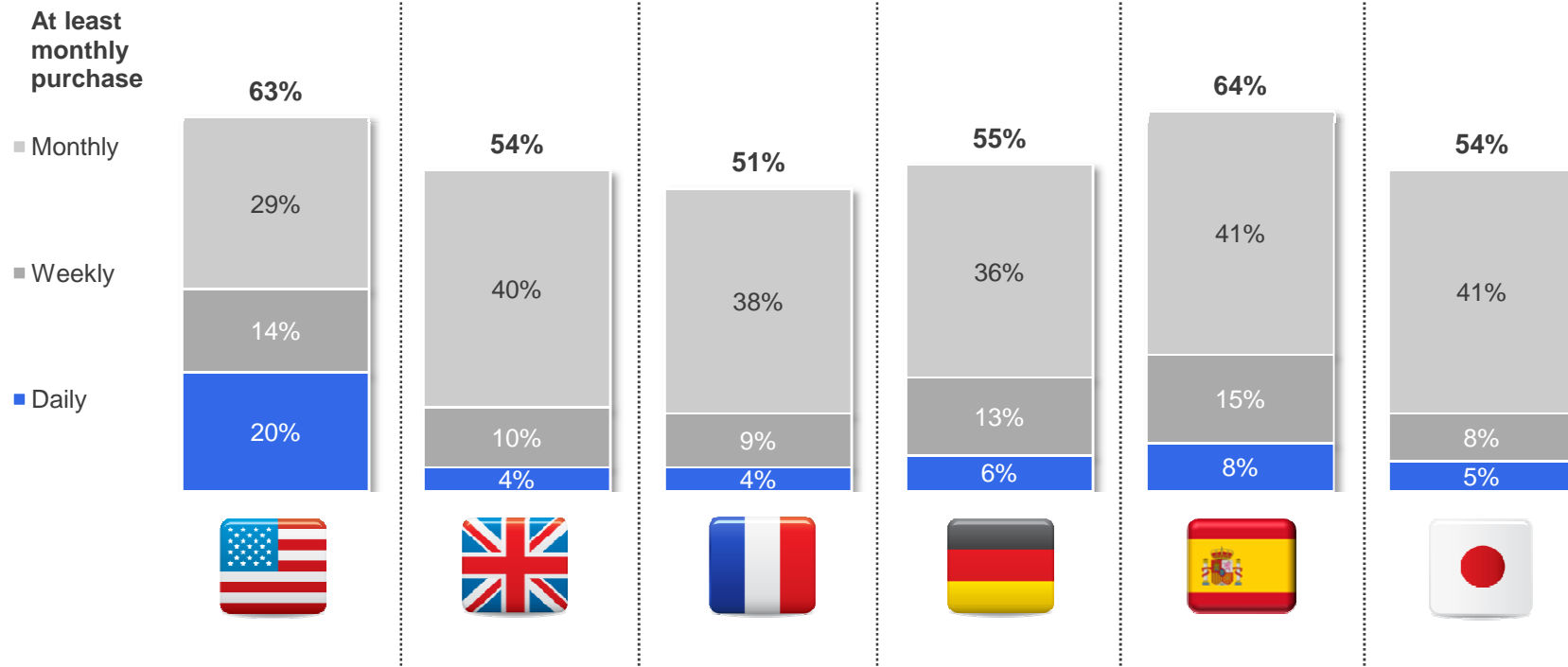
24%

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).
Q44. Have you ever purchased a product or service over the Internet on your Smartphone?

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



Frequency of Mobile Purchase



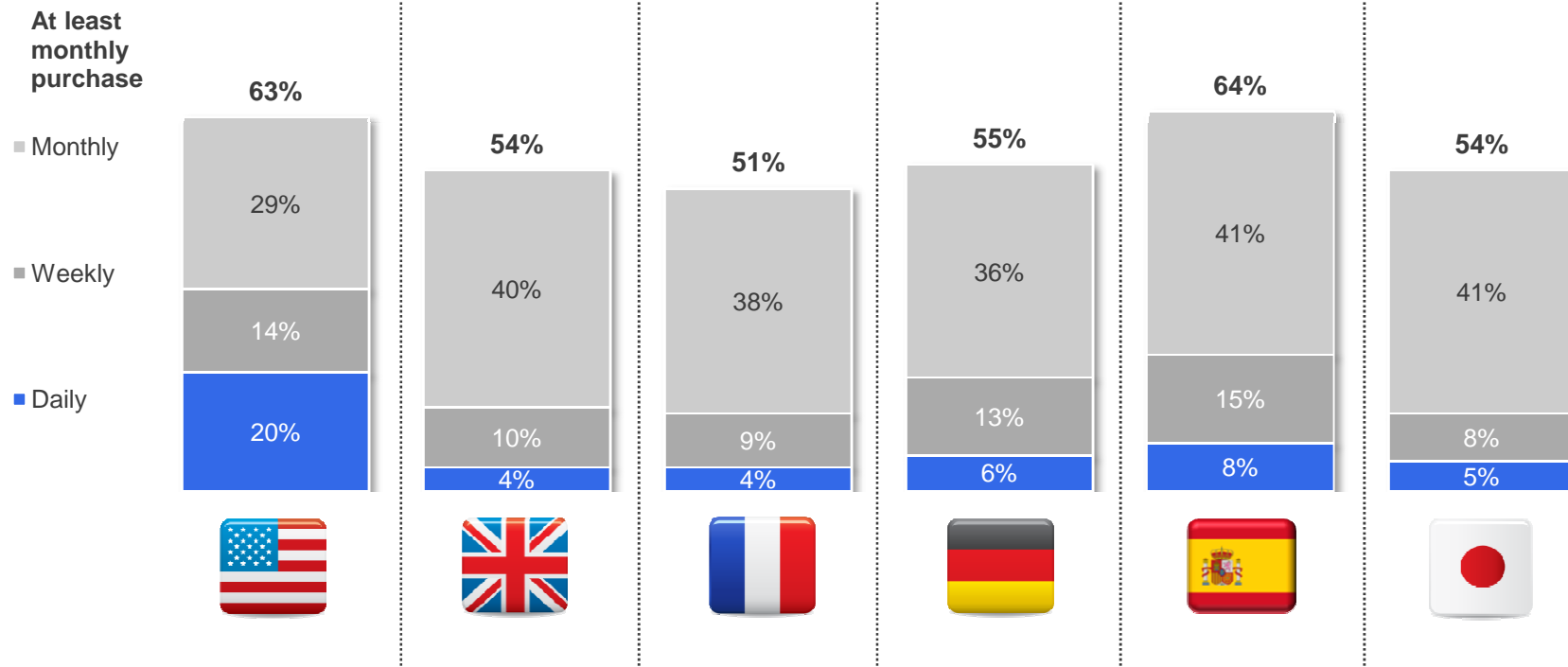
Base: Private smartphone users who use the internet in general and who purchased via internet on their smartphone wave 2 (US: 336; UK: 304; FR: 240; DE: 271; ES: 242; JP: 400).

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

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).

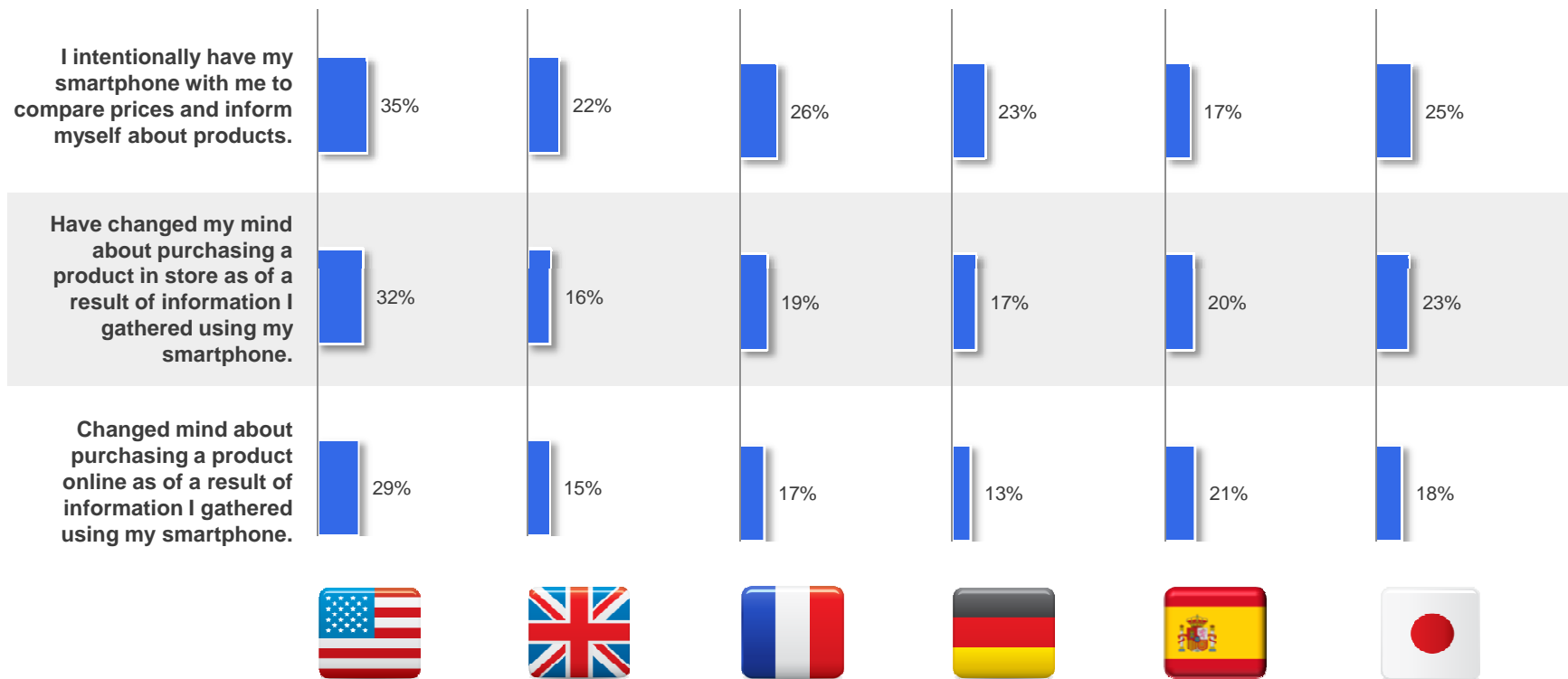
Q47. How frequently do you purchase products or services with your smartphone?

Smartphones Influence Consumer Purchase Decisions



Relevance of Smartphone

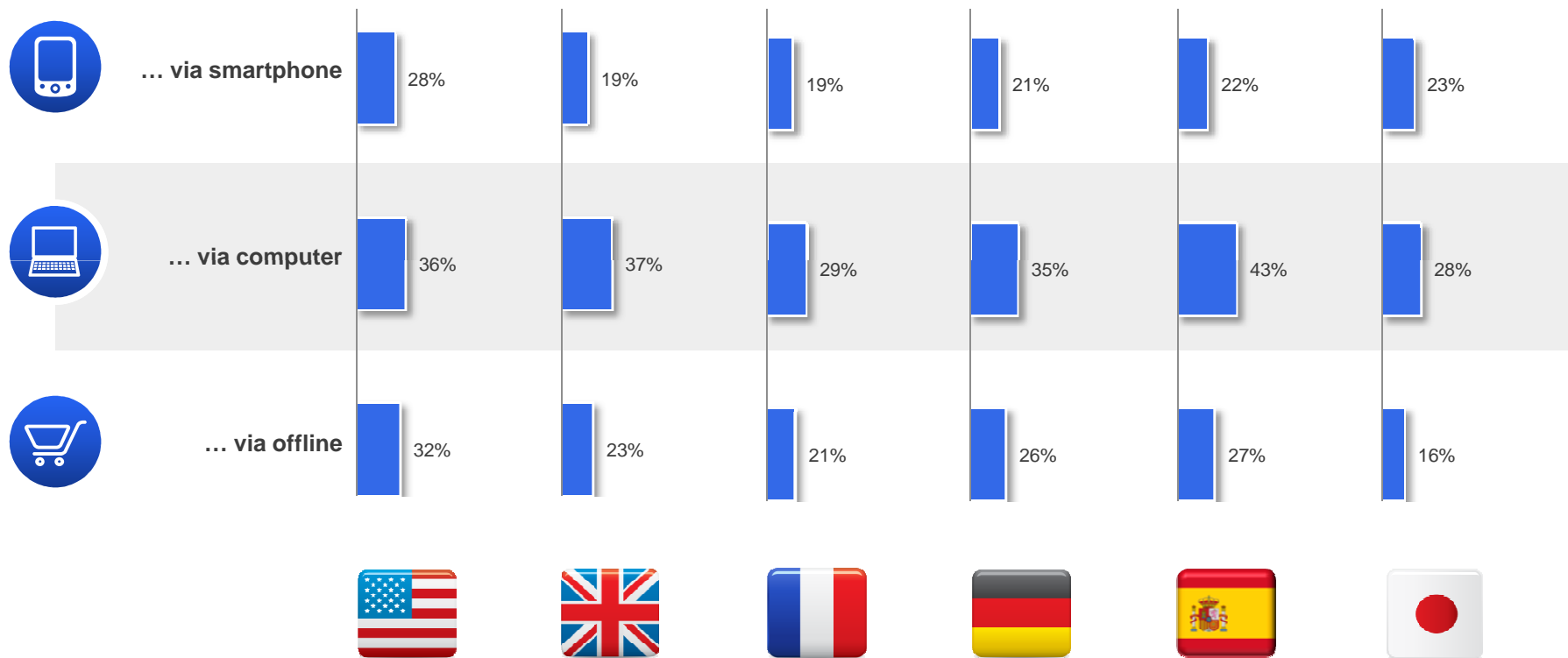
Relevance smartphone for shopping (Top2)



Smartphone Research Also Leads to Purchase Online and In-store



Researched via Smartphone and Purchased...



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).
 Q48. Listed below are various products or services. For each of these products or services please indicate which statement applies to you.
 (Net-count overall mentioned products.)

Google Confidential and Proprietary 23



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%



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