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Mobile Internet Insights

Report Poland



Ipsos MediaCT Germany
The Media, Content and Technology Research Specialists

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Worldwide Smartphone Shares



Agenda



1 Background & Objectives



2 Research Design



3 Management Summary



4 Mobile Internet Insights



5 Demographics





1. Background

- The mobile internet is today's main driver of growth in time spent online.
- Its rapid adaptation by consumers will offer opportunities to establish significant revenue streams.
- Gaining deep insight into usage patterns provides the base and starting point for offering products, services as well as information satisfying true customer demands.





1. Objectives

- This survey is designed to gain insight into usage of the mobile internet on smartphones across the world.
- In detail:
 - Facts and Figures about smartphones, their usage and relevance
 - Internet Usage in general, search, video, social networking, mobile advertising and m-commerce via smartphones – partly in comparison to PCs.



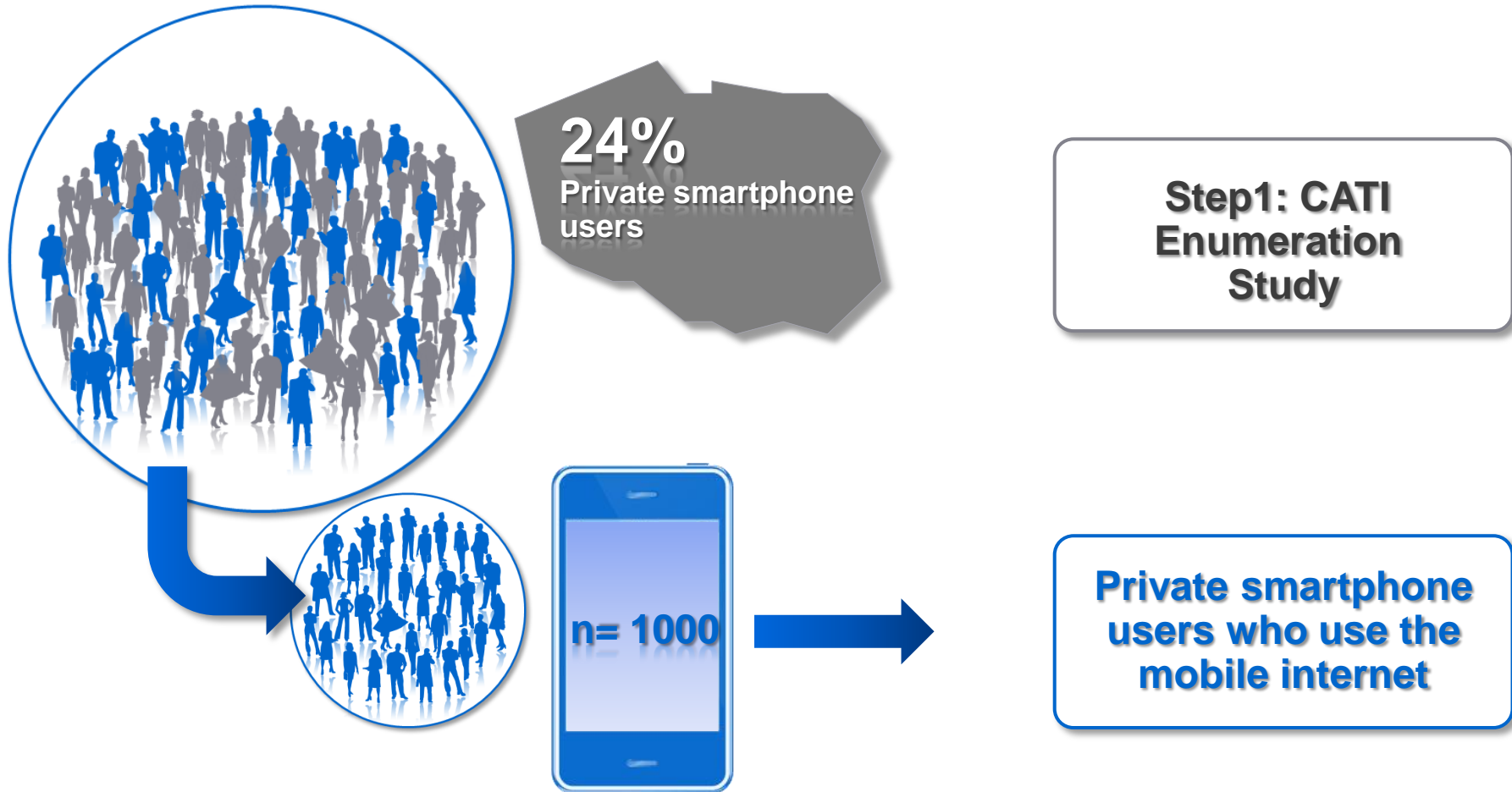


2. Research Design

- Method: Online interviews
- Target group:
 - Private smartphone users who use the internet
 - Distribution according to Enumeration Study
- Sample Size: n= 1000



The Universe of this Survey



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3. Management Summary



» Management Summary: Facts and Figures about Smartphones

■ The typical smartphone user: 18-34 years old, educated and full-time working

Smartphones are not a gadget of the very young only – the majority of users are between 18-34 years old, are educated with full-time employment and an annual net income of more than zł 2.401. Many users are new to this smart world (71% first device), more than one half joined within the past 12 months.

■ Devices, their role and usage: Important accessory - always and everywhere

Nokia (34%) followed by Samsung (27%) with highest market share and with distance to other brands. Rather un-mobile location usage place number 1: at home followed by on-the-go and at work. The user expect an easy navigation and the smartphone is important as purse and key – more than the half don't leave the house without. The users are driven by the need to kill time and to have the information via internet at hand by taking the smartphone along. Internet usage – especially browsing (36% last week) and emailing (35%) – are very important for smartphone users. Every fourth user does not have cross-media usage habits: the majority does something in parallel when using the smartphone like listening to music (59%), using the internet on a further device (37%) or watching TV (30%) or movies (27%).

» Management Summary: Internet Activities in Detail

■ Internet Usage: High frequency and number of daily sessions

The typical smartphone user accesses the web almost every day (25% mobile, 74% fixed) with several sessions on a usage day – however rather short ones on mobile and longer ones on PC. Almost one fourth expect to spend more time on the mobile web via smartphone in the future. Future web usage on PC is on a higher level.

■ Search: High frequency and Google the one

Search engines of major relevance in everyday search (36% mobile, 93% fixed). 29% never use local search and almost 90% mention further actions after looking up specific information, with 44% making a purchase. For the majority Google is not only one of the used search engines but the number one search engine.

■ Videos: Low frequency and YouTube the one

Almost every second smartphone is used to watch videos at least on a monthly base. YouTube (81% mobile, 89% fixed) is on first place followed by facebook (33% mobile, 42% fixed) – wrzuta (38%) also used via Computer.

■ Social Networking: High frequency and Facebook the one

21% of the smartphone users access social networks via smartphone every day – 13% post personal updates daily. THE social network is Facebook (78% mobile & 79% fixed) – Nasza Klasa with 71% usage via Computer.

» Management Summary: Mobile Advertising and Commerce

■ Mobile Advertising: Accepted on high level with high awareness

41% would not mind mobile ads as long as they receive a goody. 14% have used a mobile coupon in a store. Almost 84% has noticed mobile advertising a least sometimes – mostly on search engines. 50% have taken action after seeing a mobile ad.

■ Mobile Commerce: Growing shopping channel hindered by security and convenience

18% use the smartphone for price comparison or product information when shopping – 15% have changed their mind on purchase as a result of retrieving information via smartphone. One fifth does not only use the smartphone when shopping physically but shops directly via this device – 46% of them within the past month. Preference of fixed PC and fear that purchase might not be secure are main barriers of mobile commerce. 18% anticipate a higher purchase rate via smartphone within the next 12 months.

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4. Mobile Internet Insights



4. Mobile Internet Insights



4.1 Smartphones: Devices, Usage and Relevance

4.2 Internet Usage

4.3 Search

4.4 Video

4.5 Social Networking

4.6 Mobile Advertising

4.7 M-Commerce

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4.1 Smartphones: Devices, Usage and Relevance

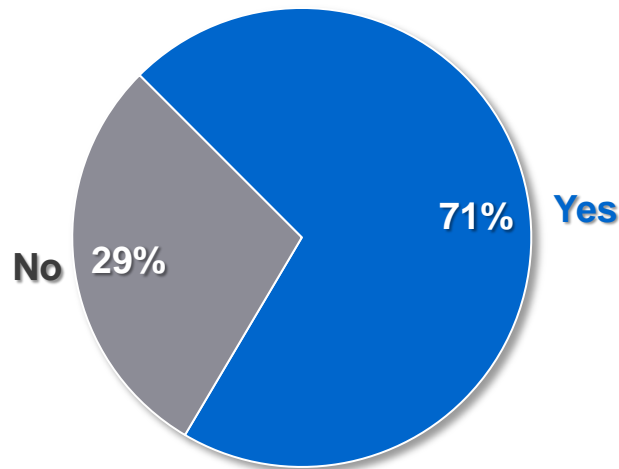


Duration of Smartphone Usage

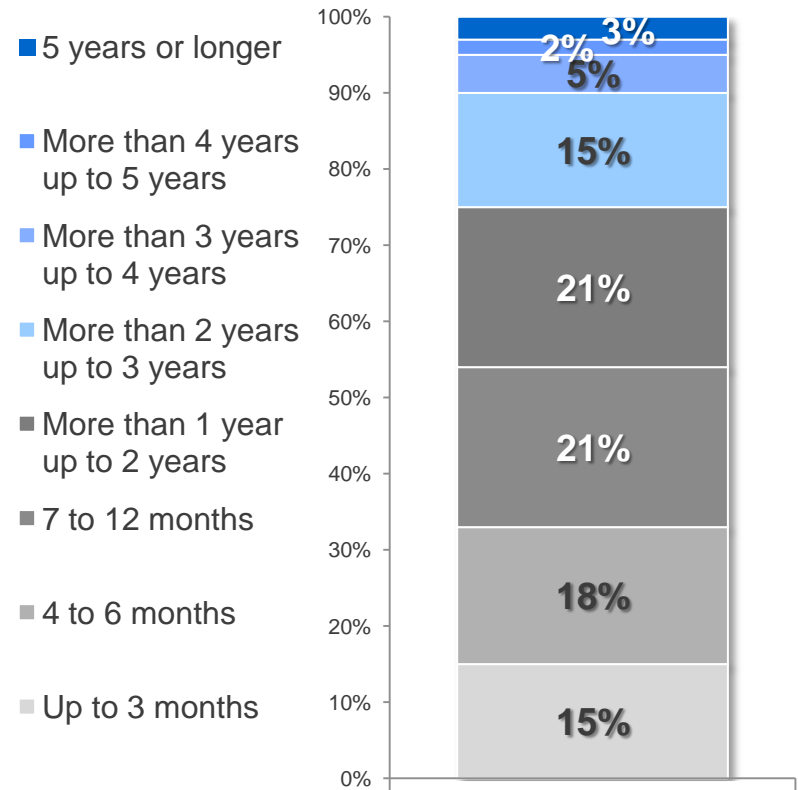


» For 71% the current phone is the first one – more than half of the users are rather new, joined the smart world within the past 12 months.

First Smartphone



Duration of Smartphone Usage

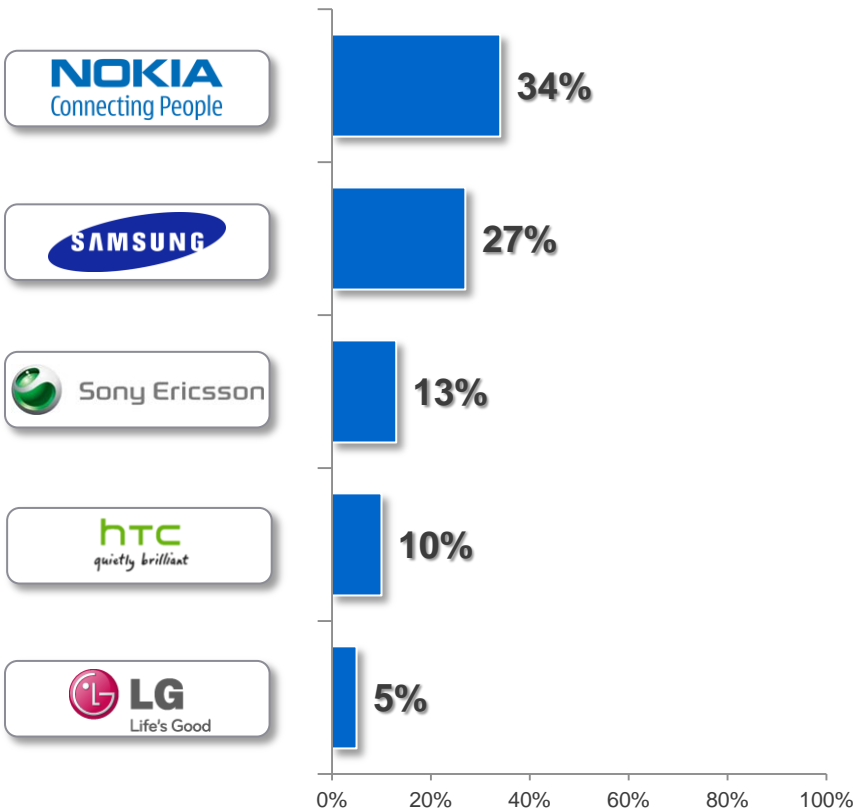


Used Top 5 Brands & Operation Systems

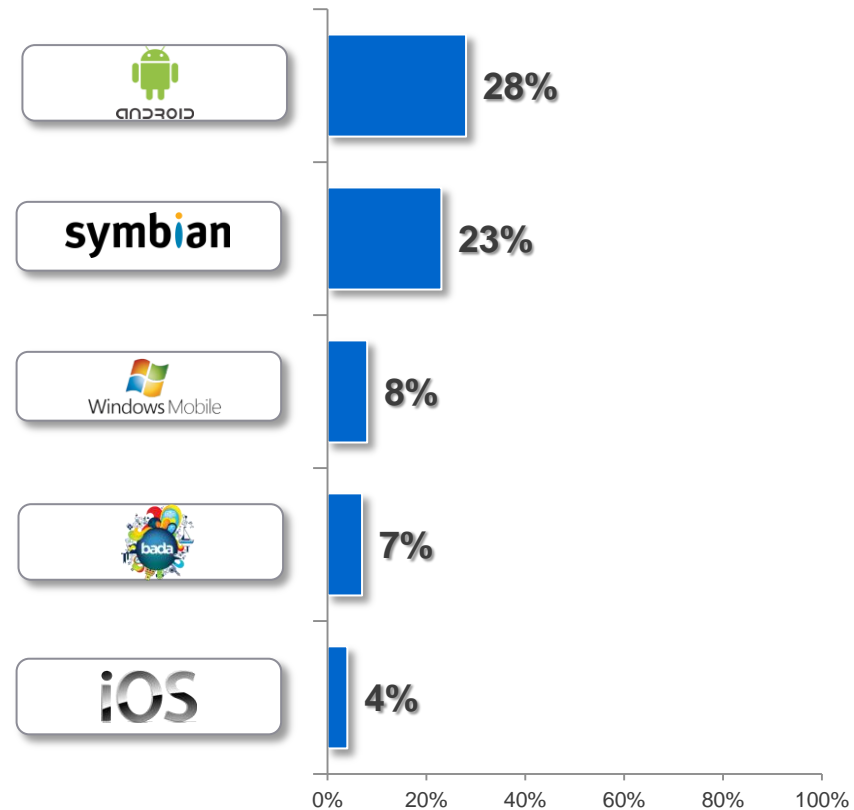


» Nokia with the highest market share followed by Samsung – android is most used OS followed by symbian.

Brands



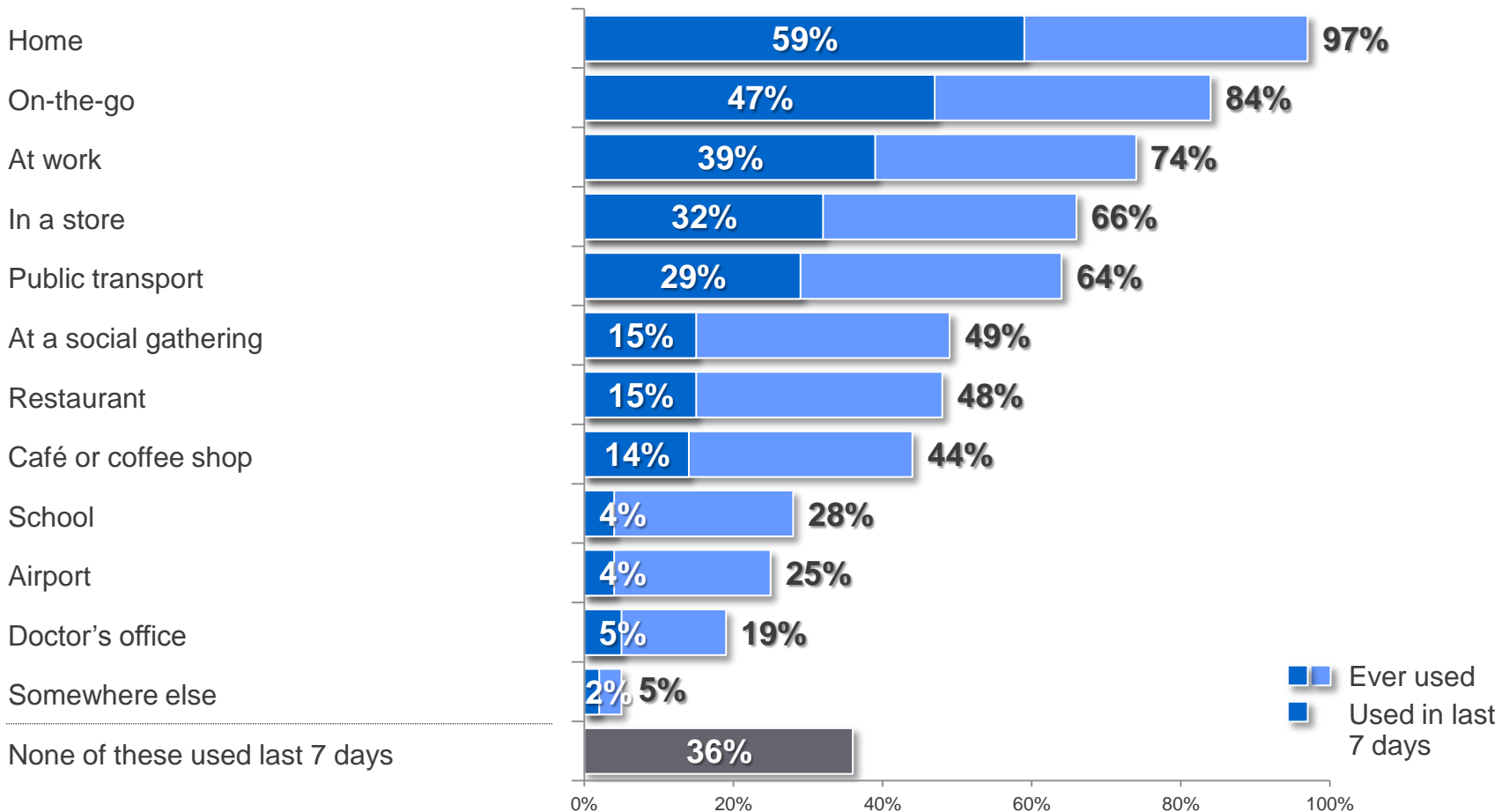
Operating Systems



Smartphone Usage Places



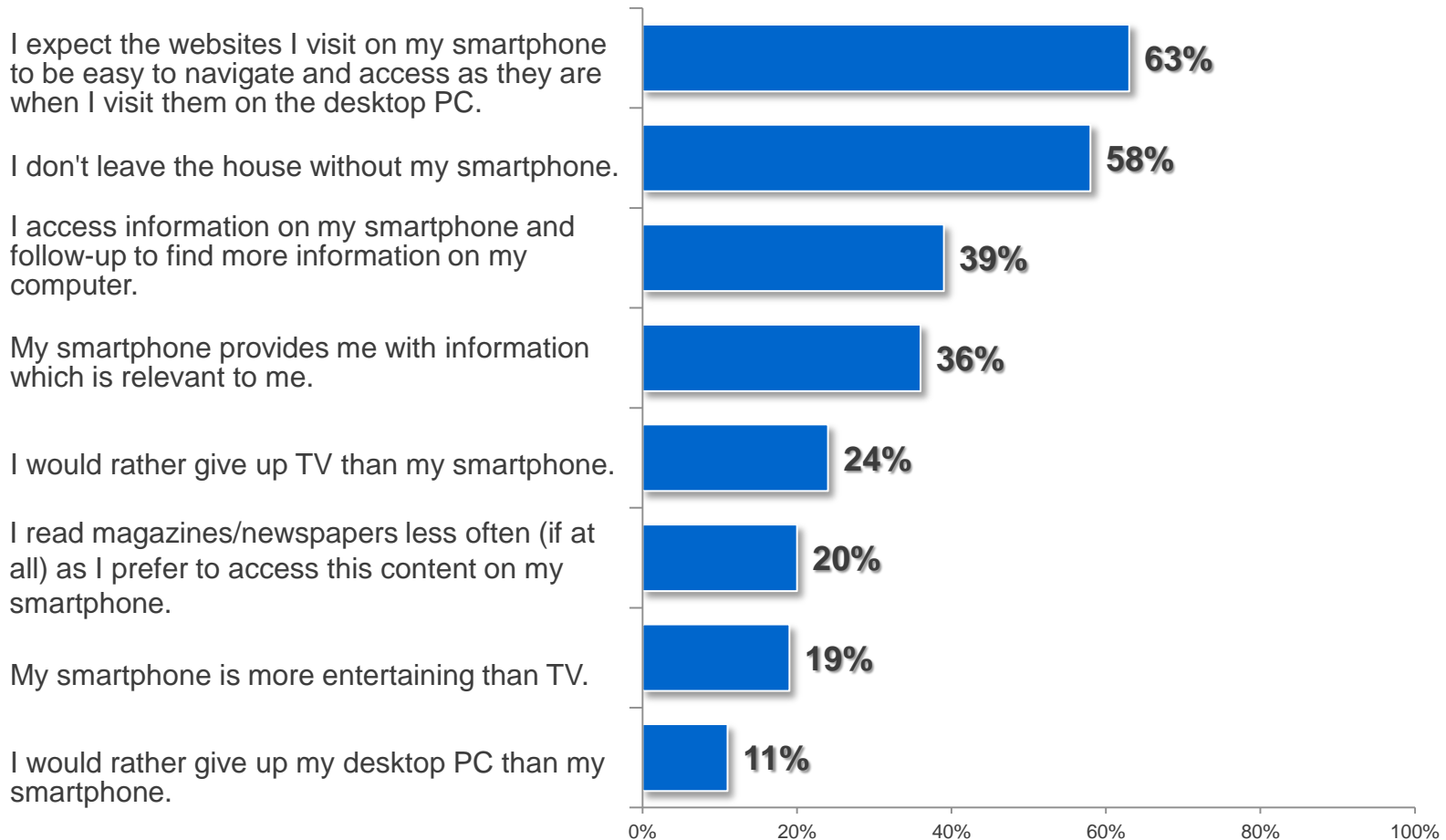
» Home is the usage place No. 1 – also on-the-go and at work.



Relevance of the Smartphone



» **Easy navigation of website via Smartphones expected – smartphones as important as purse and key: house not left without.**



Triggers of Smartphone Usage



» **Passing away time and having information at hand are the top triggers for mobile web.**

My smartphone is good to pass away some time while I'm waiting e.g. for the train or bus.

I use the Internet on my smartphone to get information when I'm not in front of a computer or other Internet

I'm a modern person and feel that I should have Internet on my mobile as a kind of accessory.

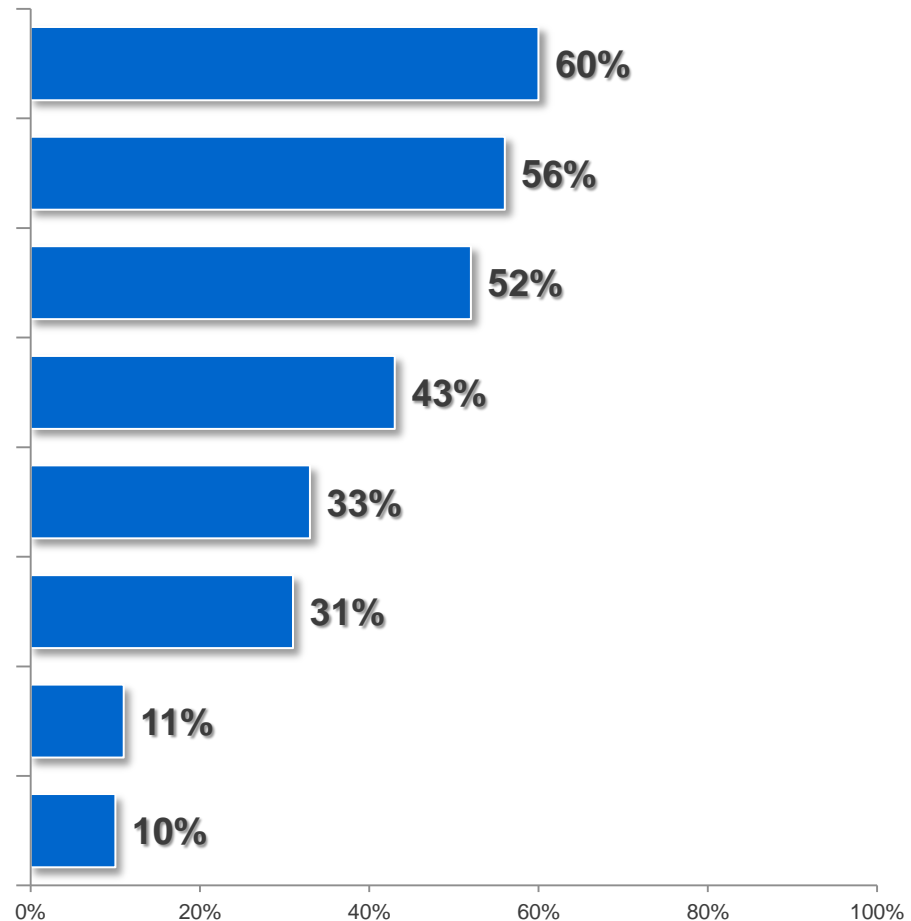
My smartphone provides me with the answer to my questions quickly when I need an immediate answer.

I want to use websites/functions of the Internet via my smartphone without being seen easily.

I don't want to miss out on anything when I'm on the go.

I use the Internet on my smartphone because it costs less than on my computer or other Internet enabled device.

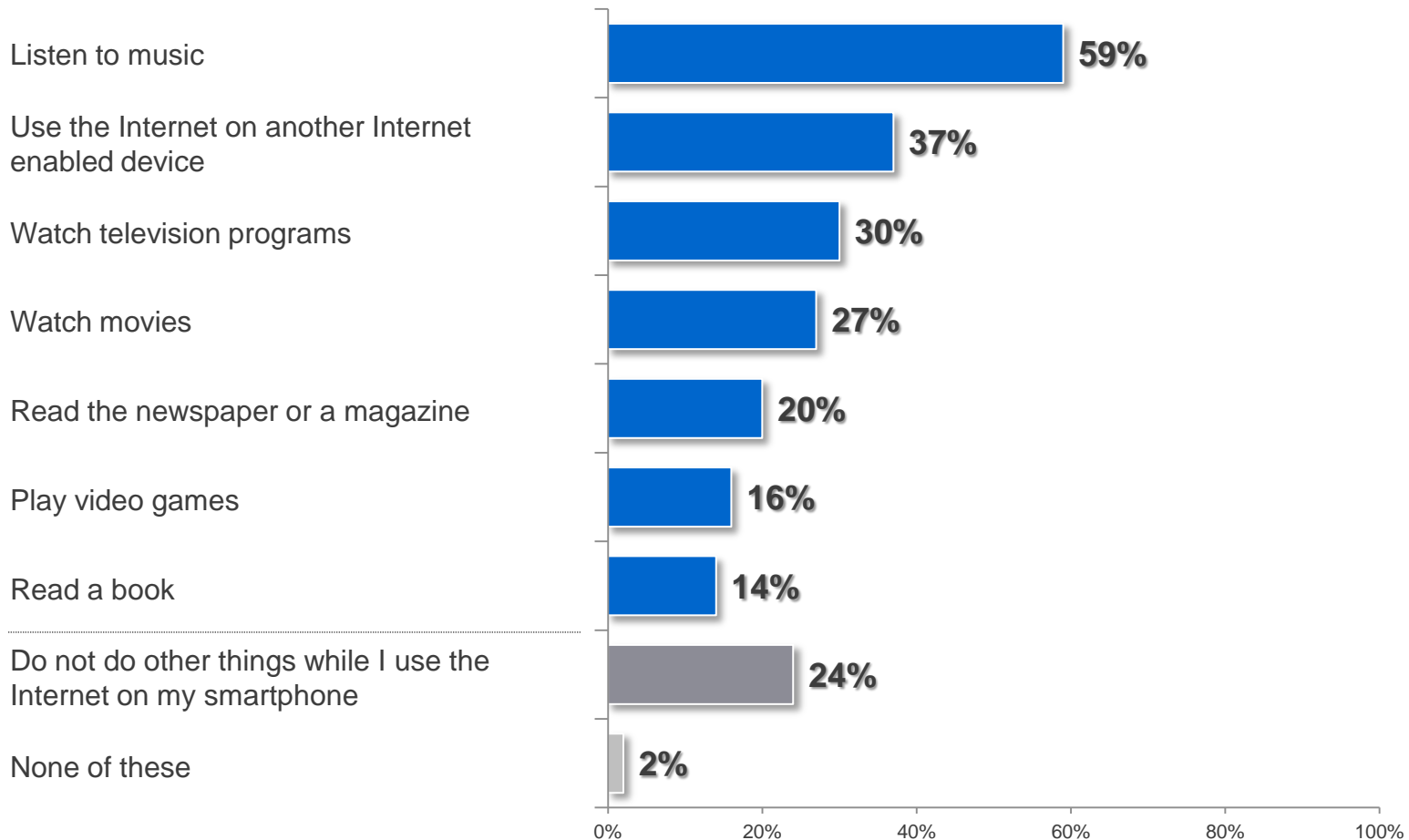
I have no other Internet access at home – so I use my smartphone.



Parallel Media Usage



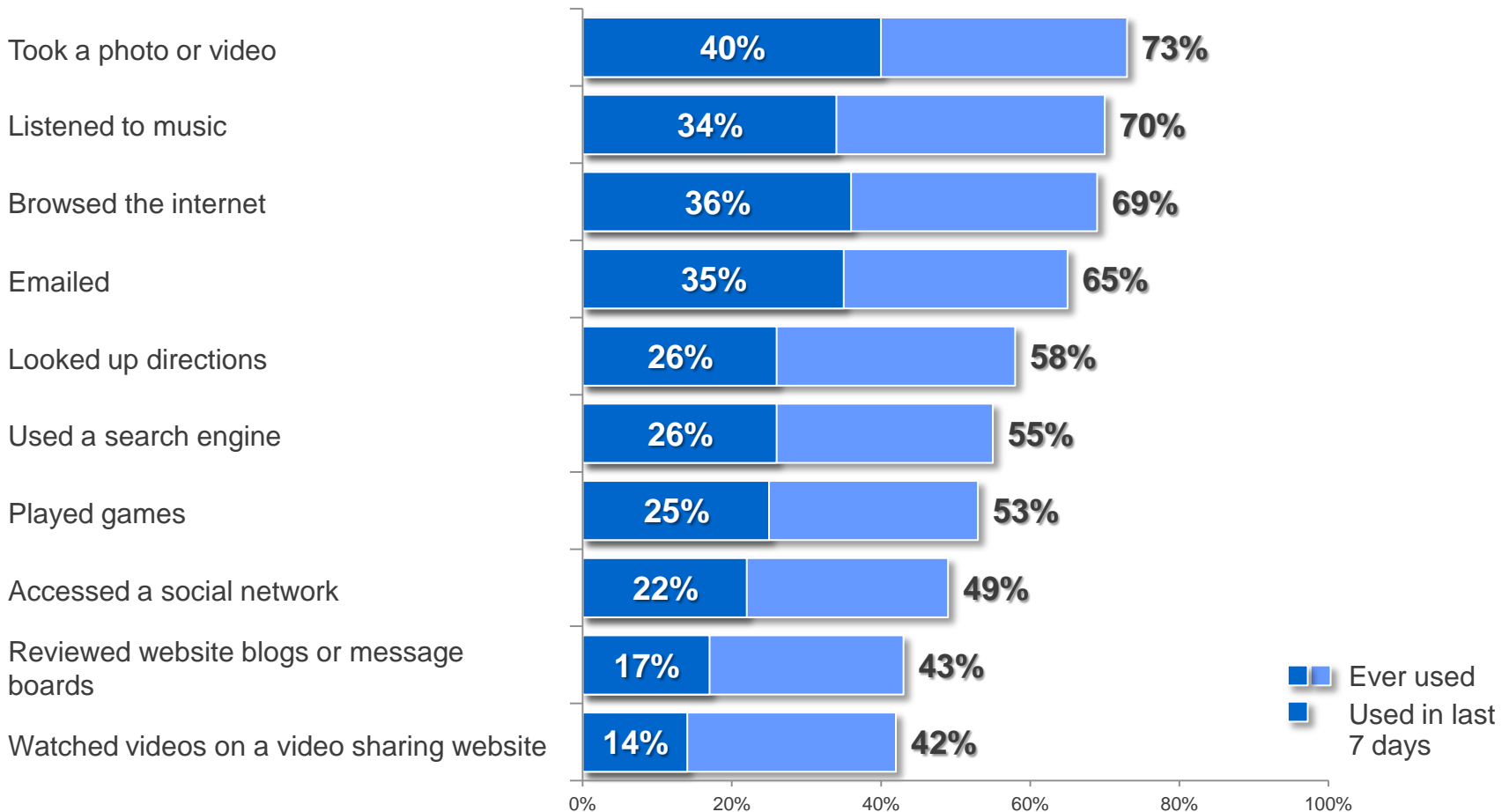
» **76% with parallel media usage – listening to music, using the internet on another device and watching TV or movies are main parallel activities.**



Activities with the Smartphone – Top 10



» Taking a photo or video, listening to music and the mobile web (browsing & emailing) and are main activities.



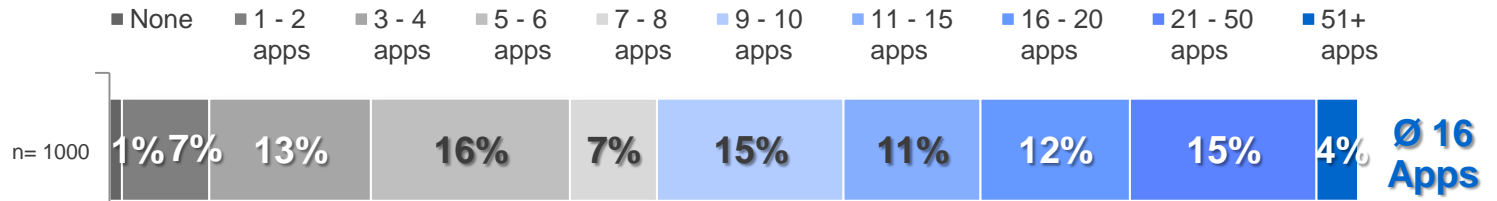
Usage of Apps



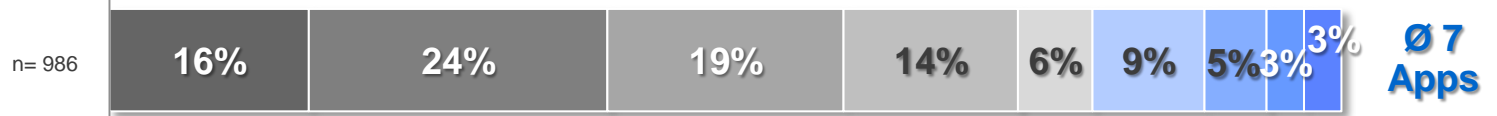
» Approx. one half of all Apps (Ø 16) with monthly active usage – every fourth is a paid one – Apps: increasing anticipated usage.



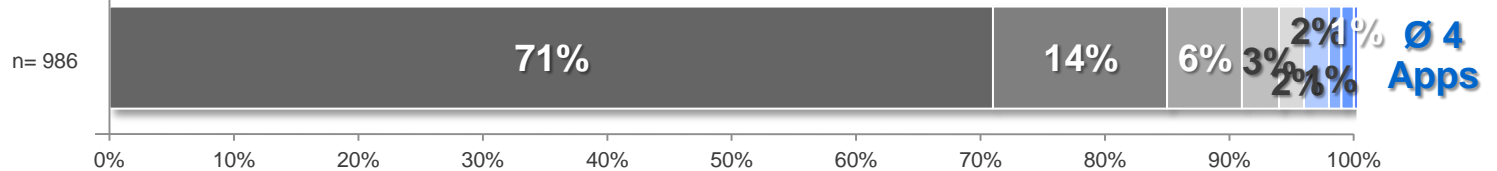
Numbers of owned Apps



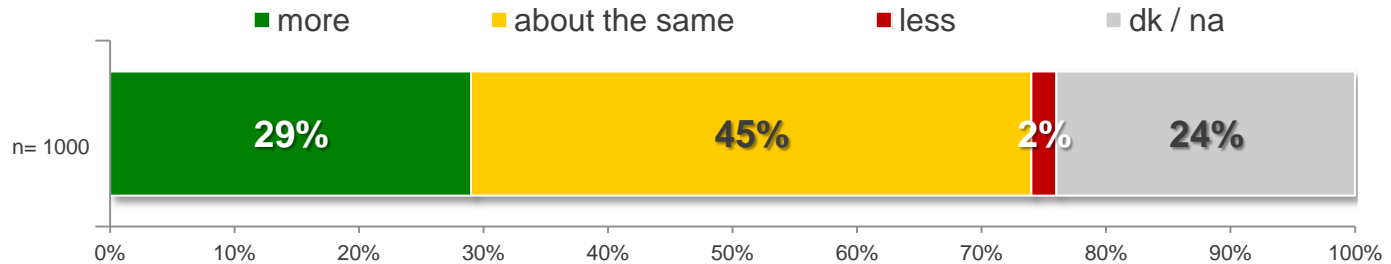
Usage of Apps in last 30 days



Numbers of purchased Apps



Usage of Apps in next 12 months



Base: Private smartphone users who use the internet in general, n= 1000
Q24: How many apps do you currently have on your smartphone?
Q25: How many have you used actively in the last 30 days?
Q26: How many have you purchased for a certain amount in an app store?
Q28: Please think about the usage of apps in the next 12 months. How will your app usage change?

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4.2 Internet Usage

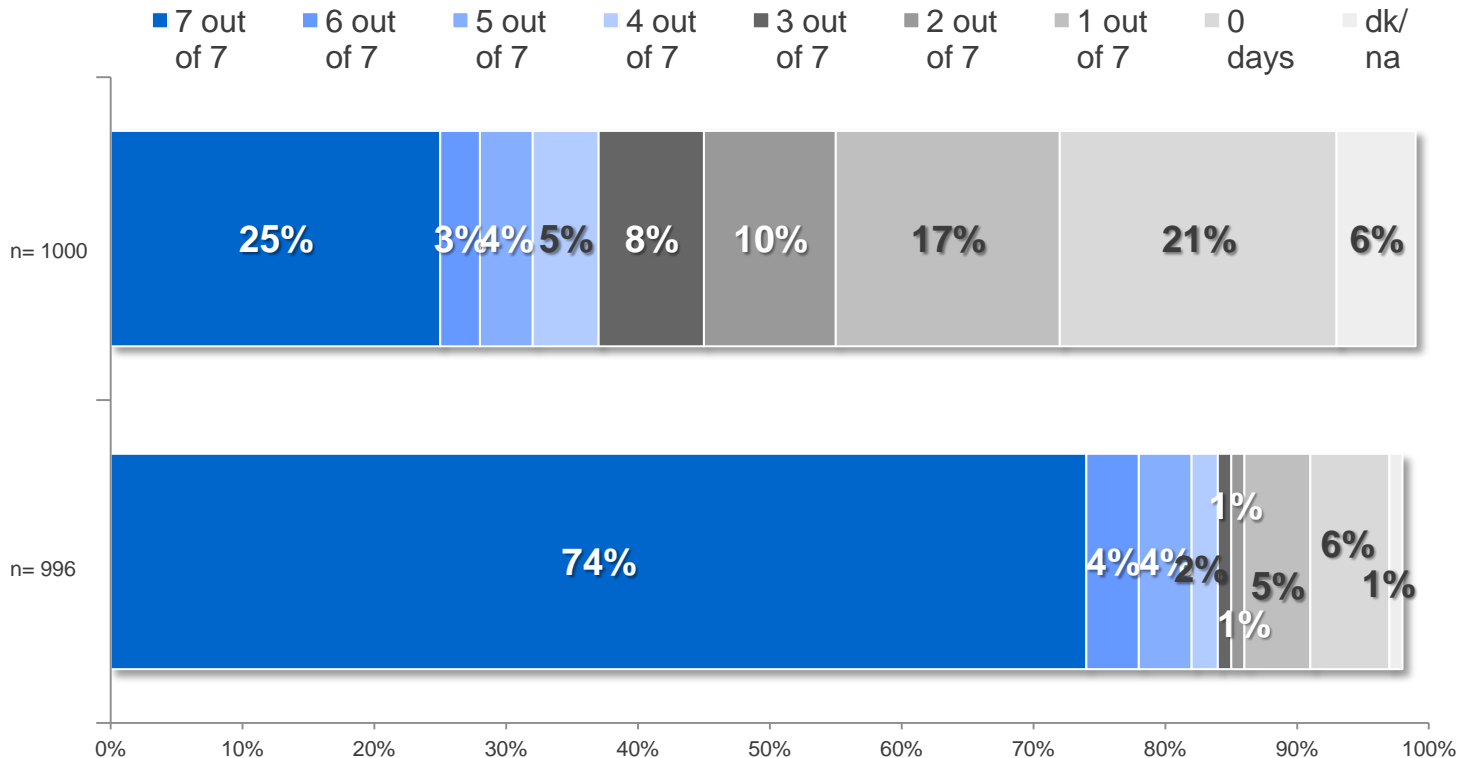


Online Days: Per Week



» 25% use mobile web daily, 37% at least on 4 out of 7 days – computer with a much higher usage frequency.

Smartphone



Computer

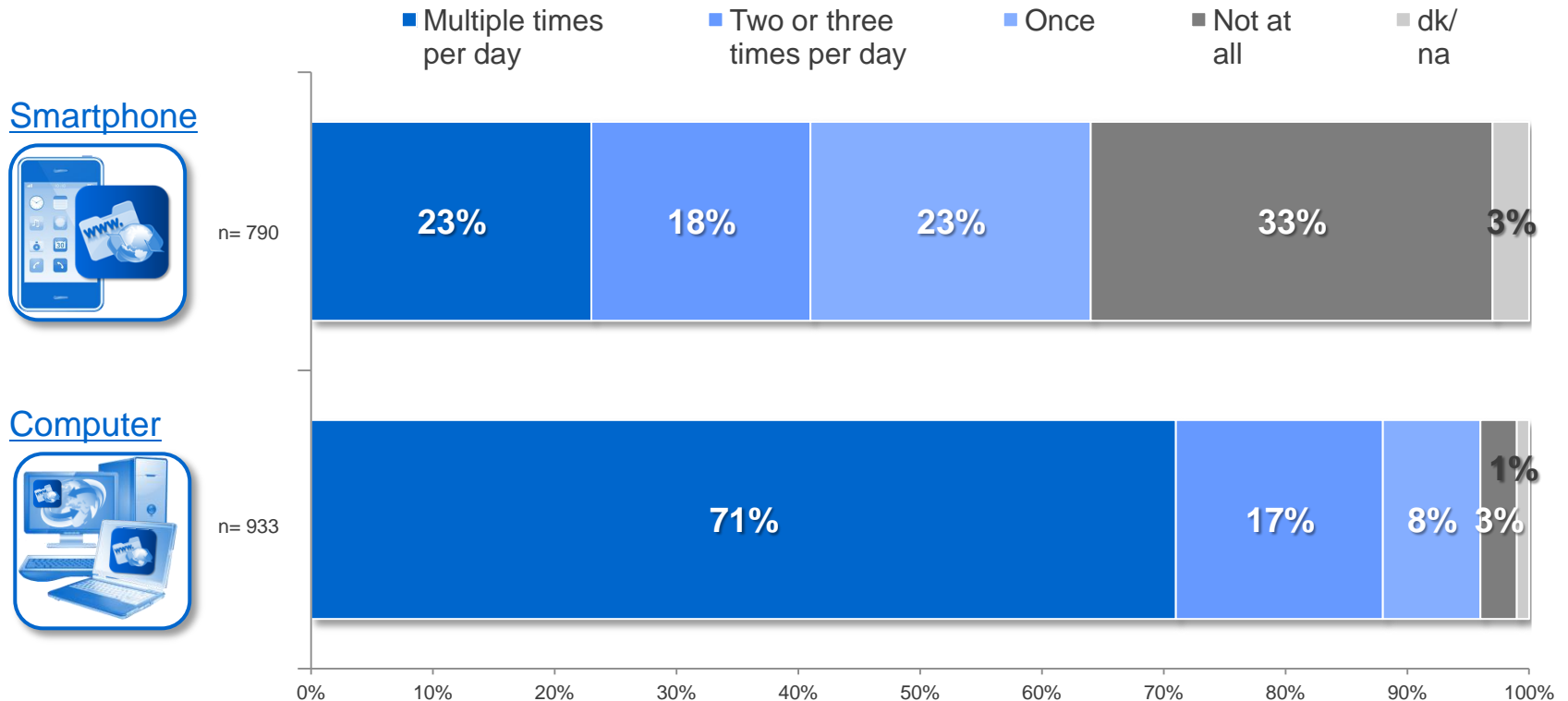


n = 996

Online Sessions per Day: Yesterday



» More than 20% have multiple sessions with mobile web per day – higher degree of usage on the computer.

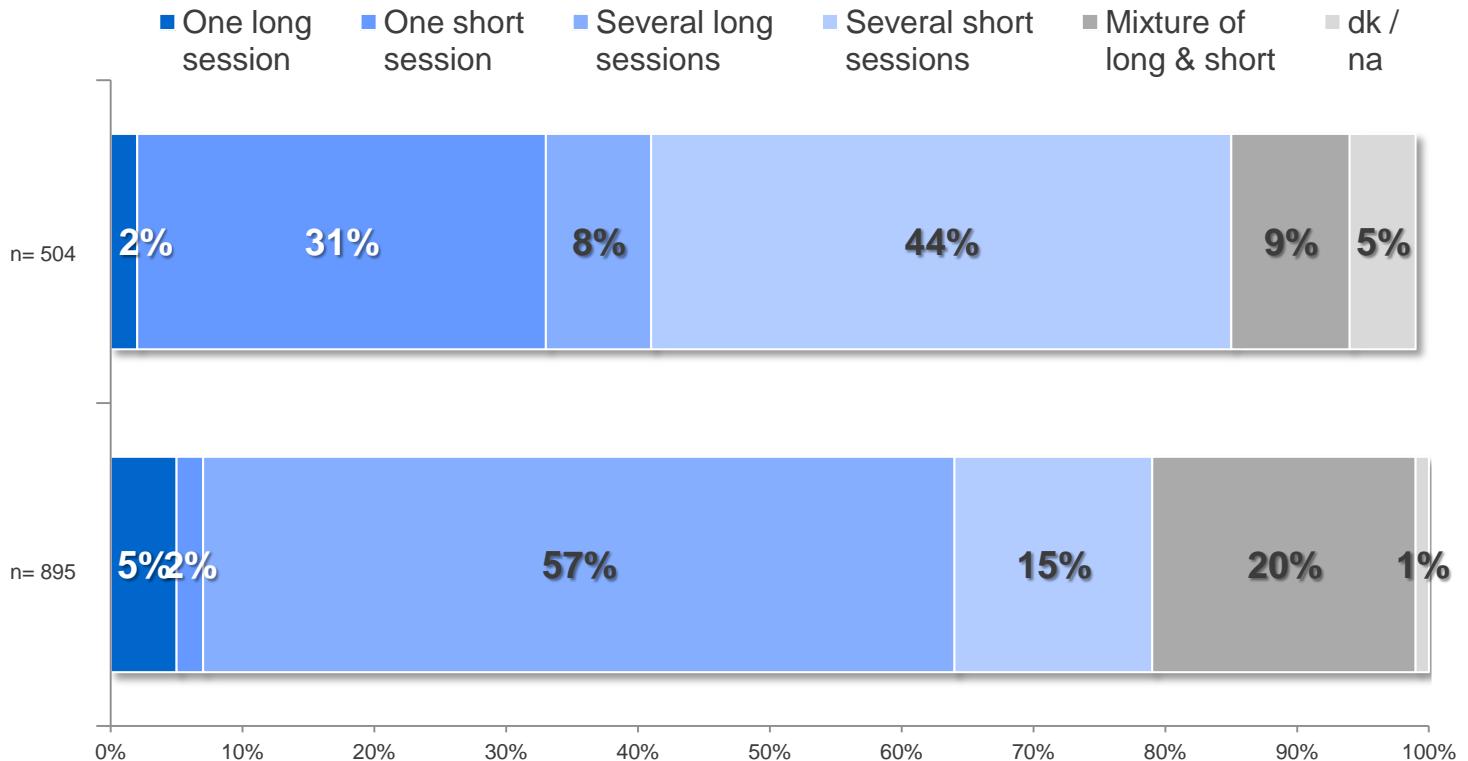


Duration of Online Sessions: Yesterday

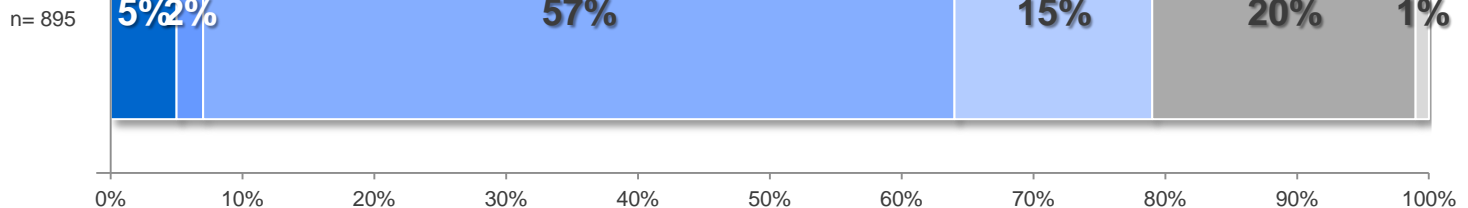


» Mobile web on smartphone mostly used for one or several short sessions – computer for longer ones.

Smartphone



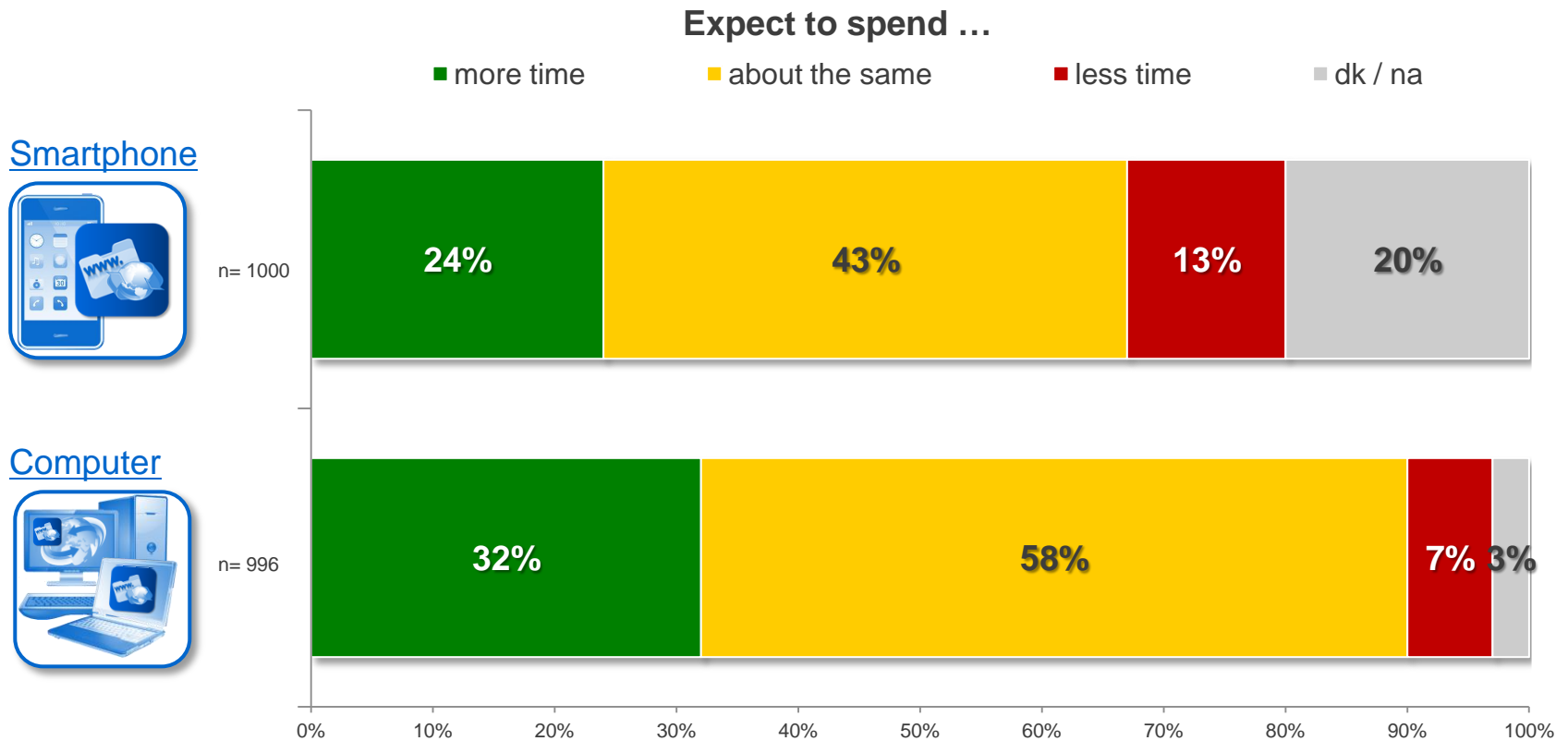
Computer



Future Internet Usage



» Almost one fourth expect increasing future usage of mobile internet – higher increase of fixed internet usage anticipated.



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4.3 Search



Usage Frequency of Search Engines



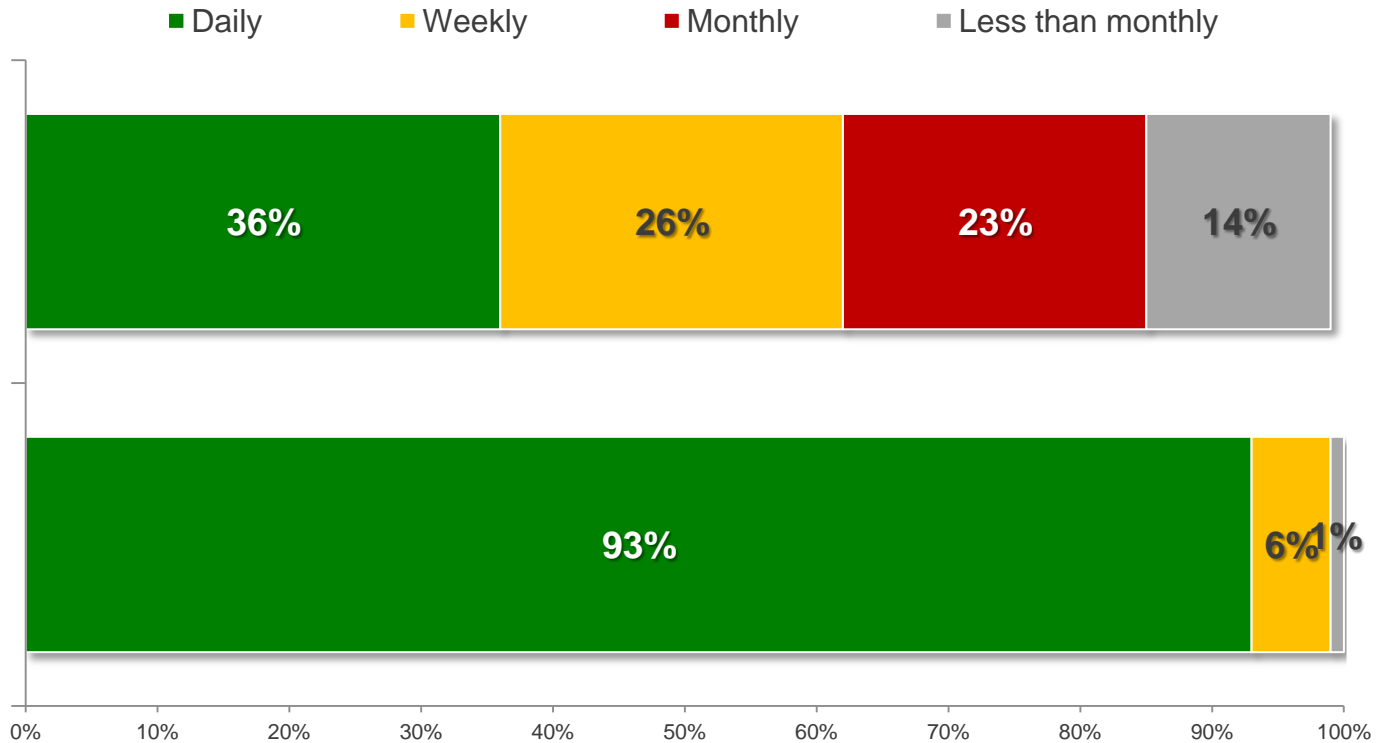
» Search engines with high usage – daily: 36% on smartphone – computer with much higher usage (93%).



Smartphone



n= 860



Computer

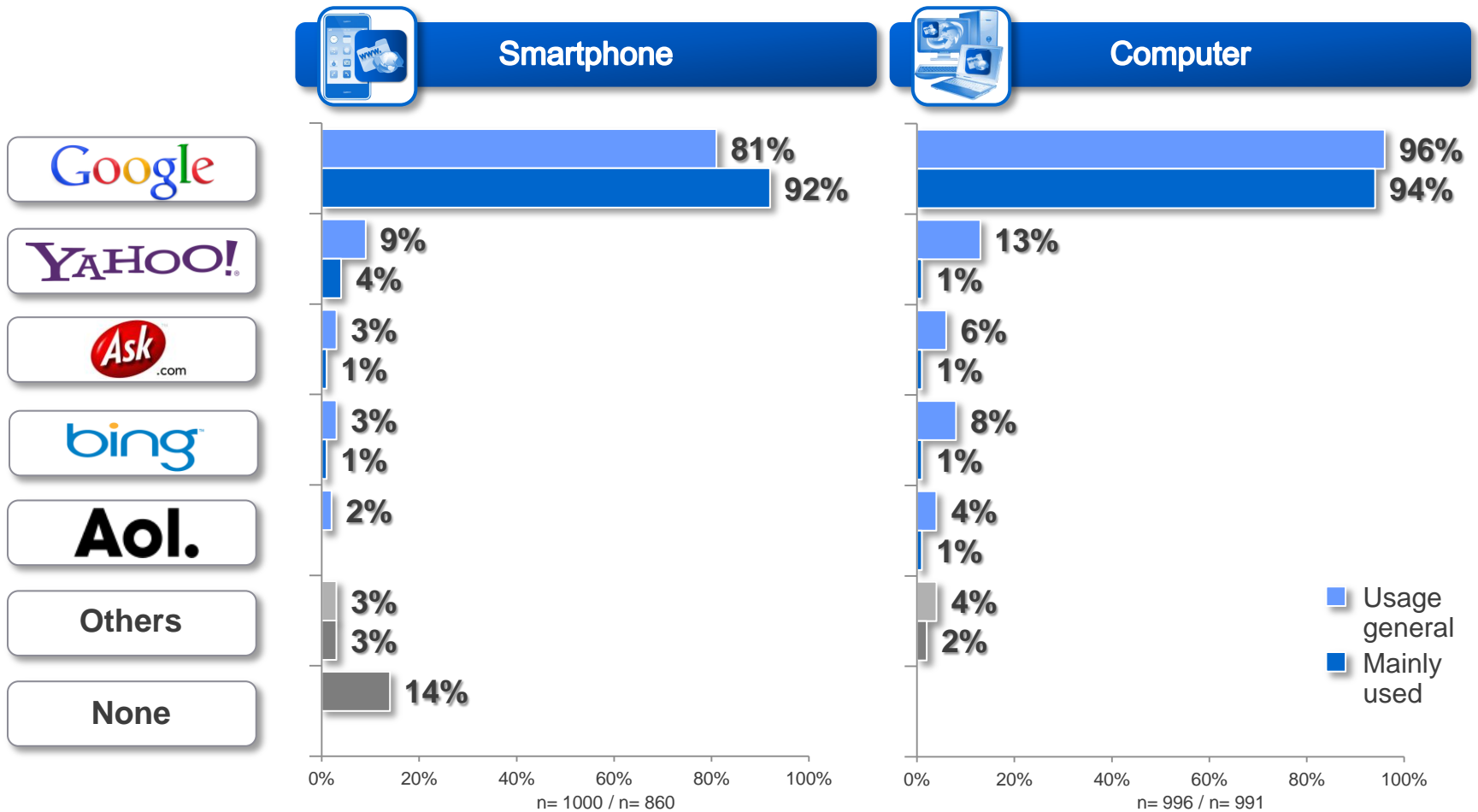


n= 991

Used Search Engines



» Google No. 1 with competitive advantage – no matter on which device.

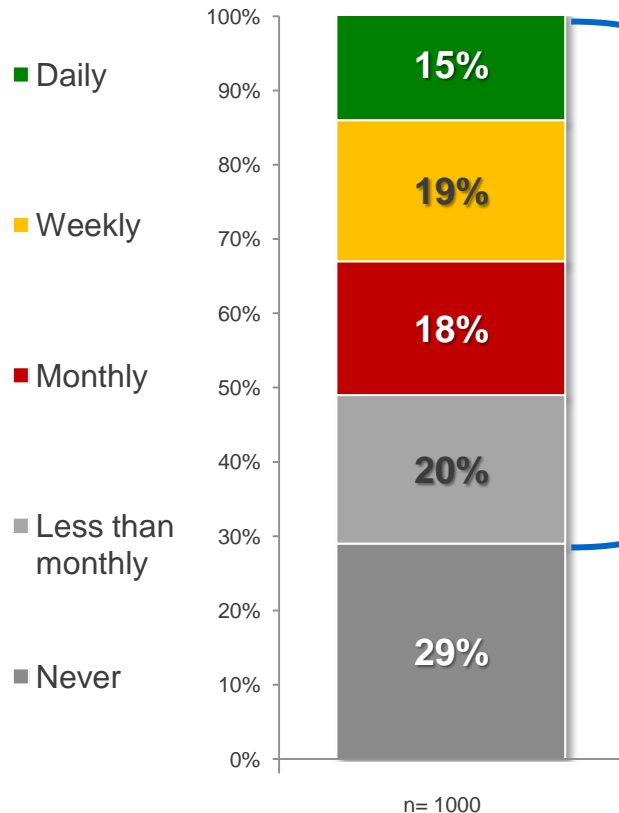


Local Searches on the Smartphone



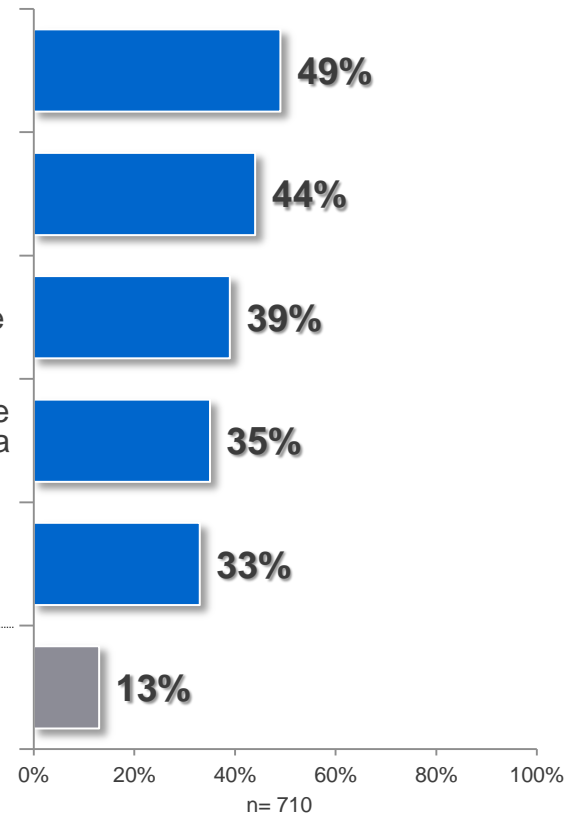
» 52% with at least monthly usage – purchase by more than 40%.

Usage of Local Searches



Top 5 of Local Searches

Visited the website of a business or service



Made a purchase (net)

Called the business or service

Looked up business or service on a map or got directions to a business or service

Made a purchase from a business online

Have not taken any action as a result of looking up local information

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4.4 Video



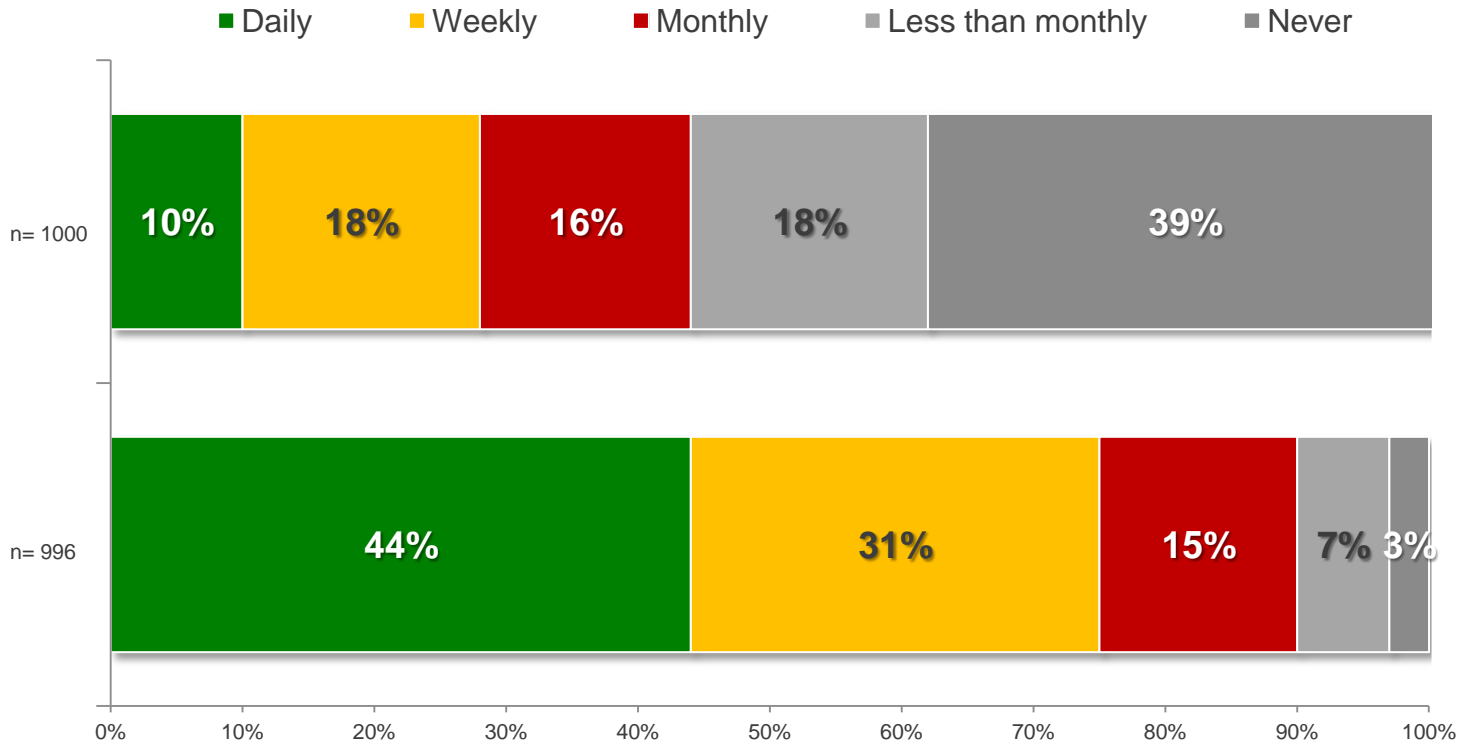
Usage Frequency of Watching Videos



» 44% with at least monthly usage of videos on smartphone – higher frequency via computer.



Smartphone



Computer



Frequency of Forwarding Online Videos



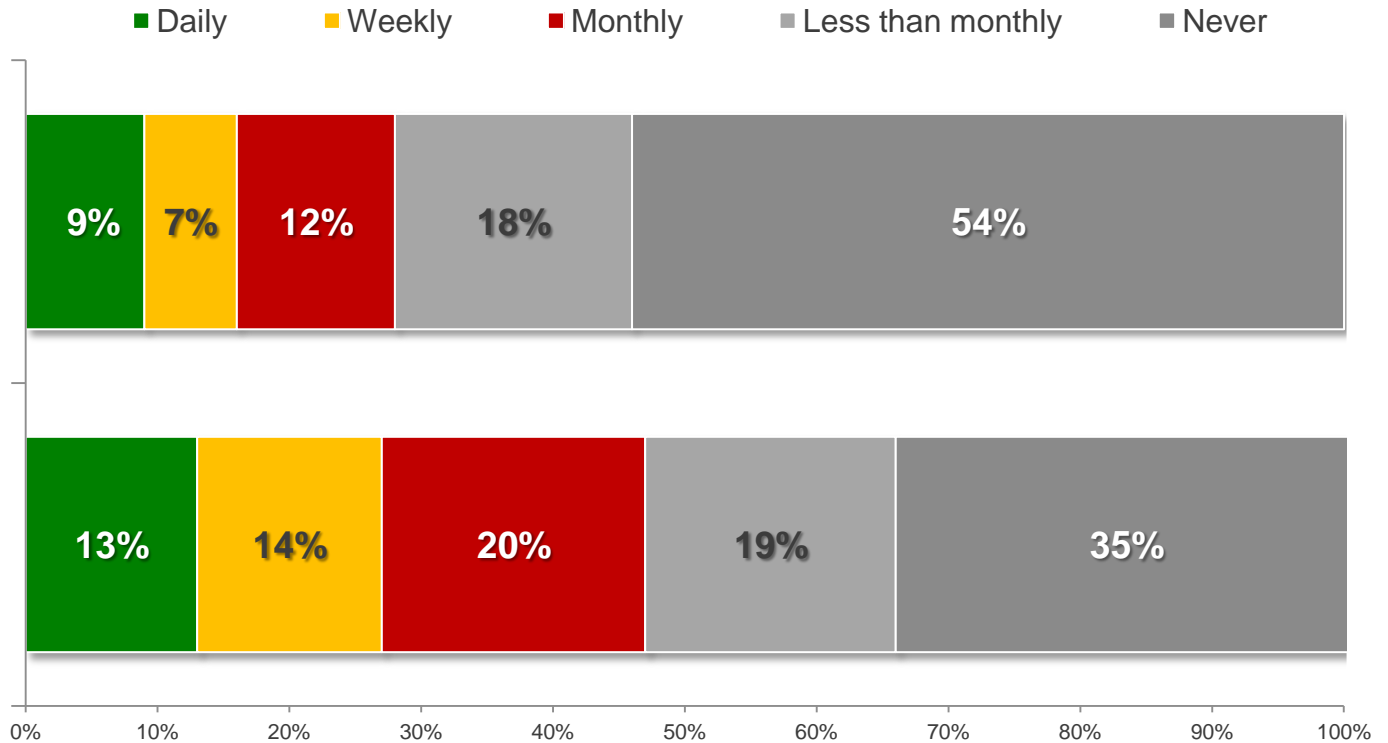
» Every tenth of user forward videos on the smartphone on a daily base – higher amount on the computer on a at least monthly base.



Smartphone



n= 613



Computer

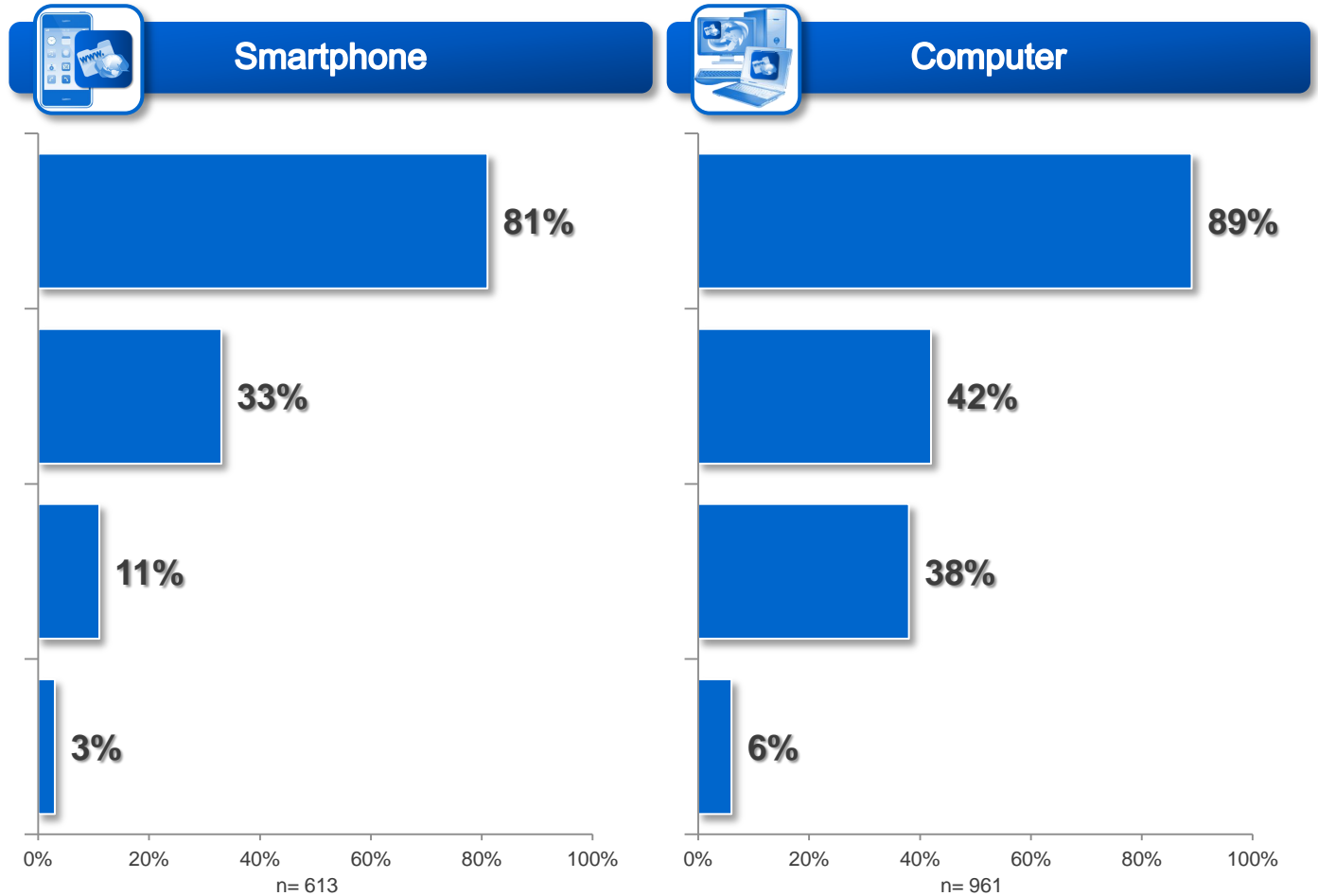


n= 961

Used Video Sites



» YouTube with higher video usage on smartphones and computer than facebook – wrzuta also common on Computer.



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4.5 Social Networking



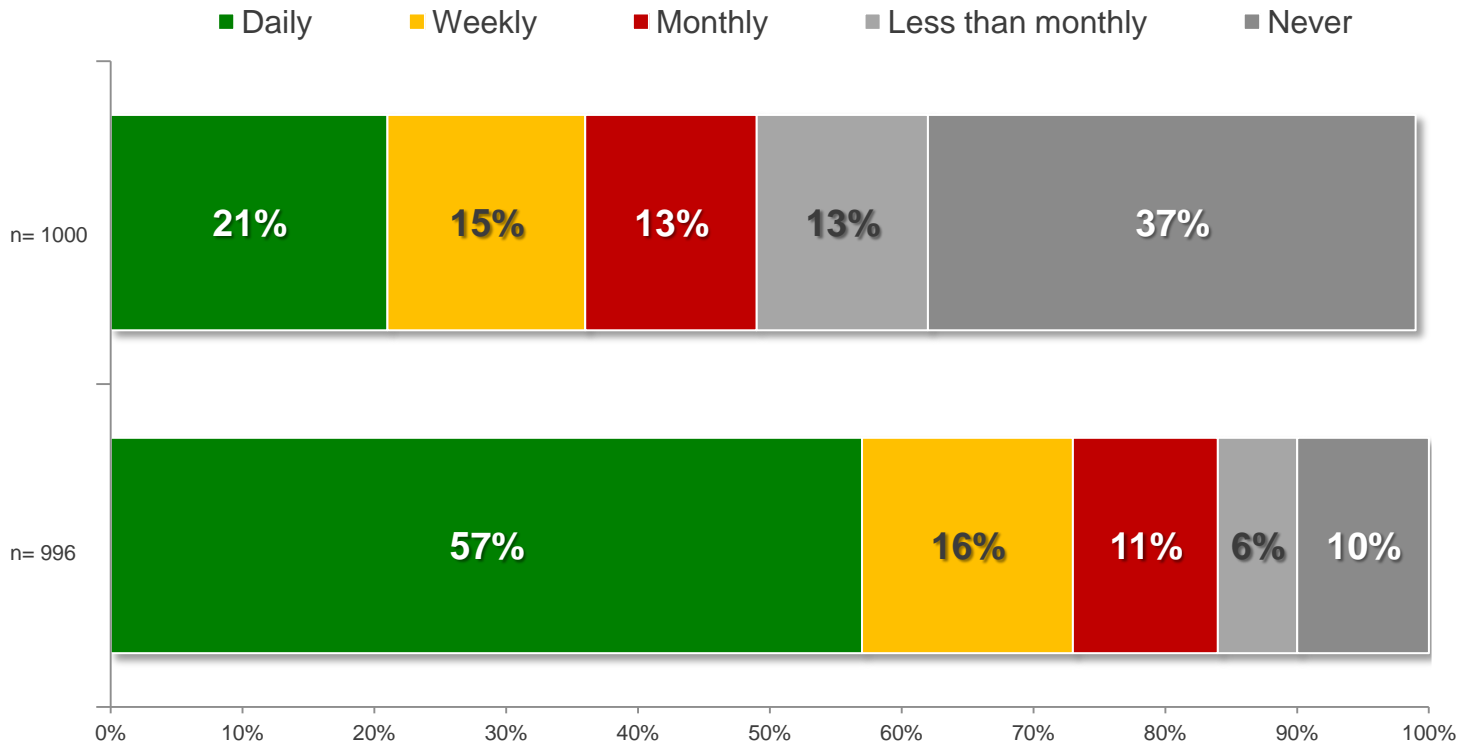
Usage Frequency of Social Networks



» Daily visits of social networks via smartphone by more than 20% – almost 60% via computer.



Smartphone



Computer



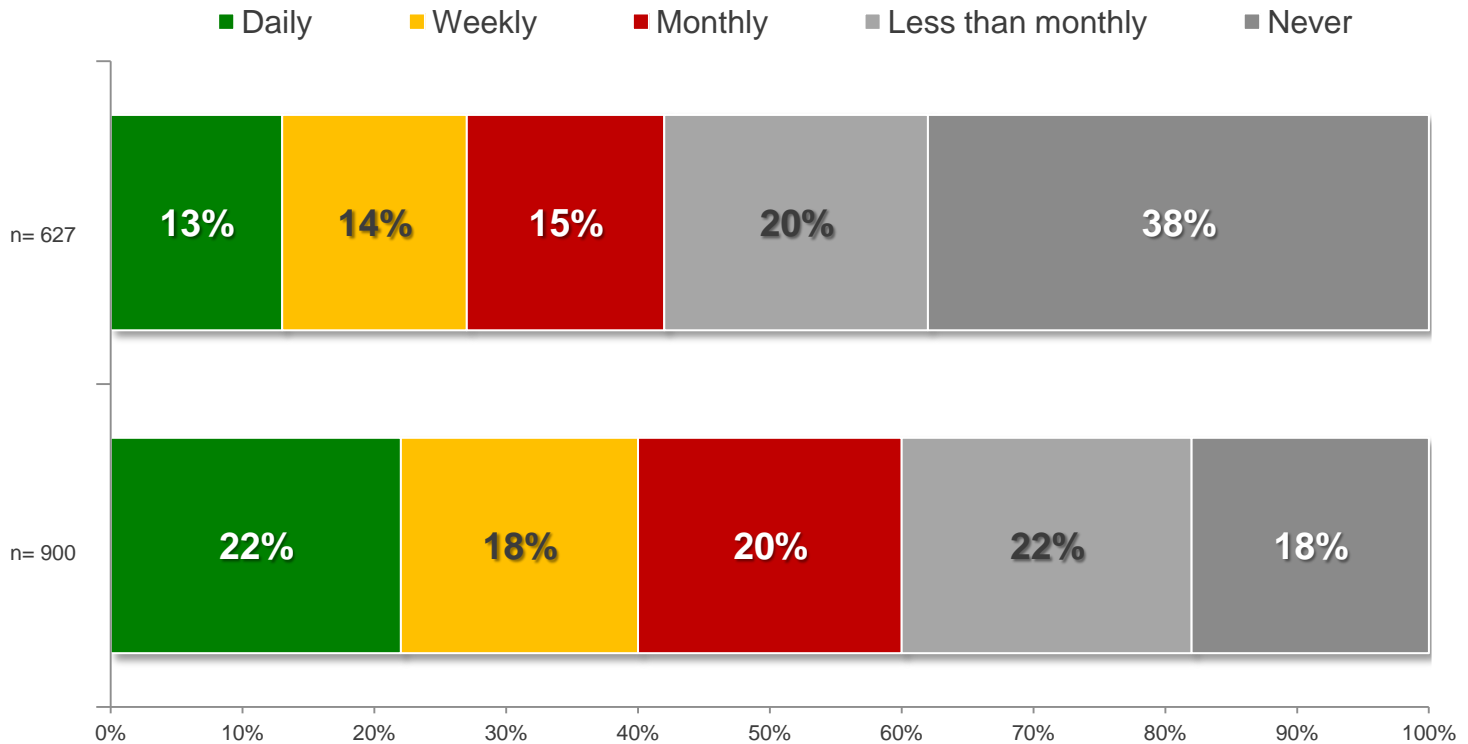
Frequency of Posting Personal Information



» Every fourth with a at least weekly update of new content on social networks via smartphone – higher usage behavior via computer.



Smartphone



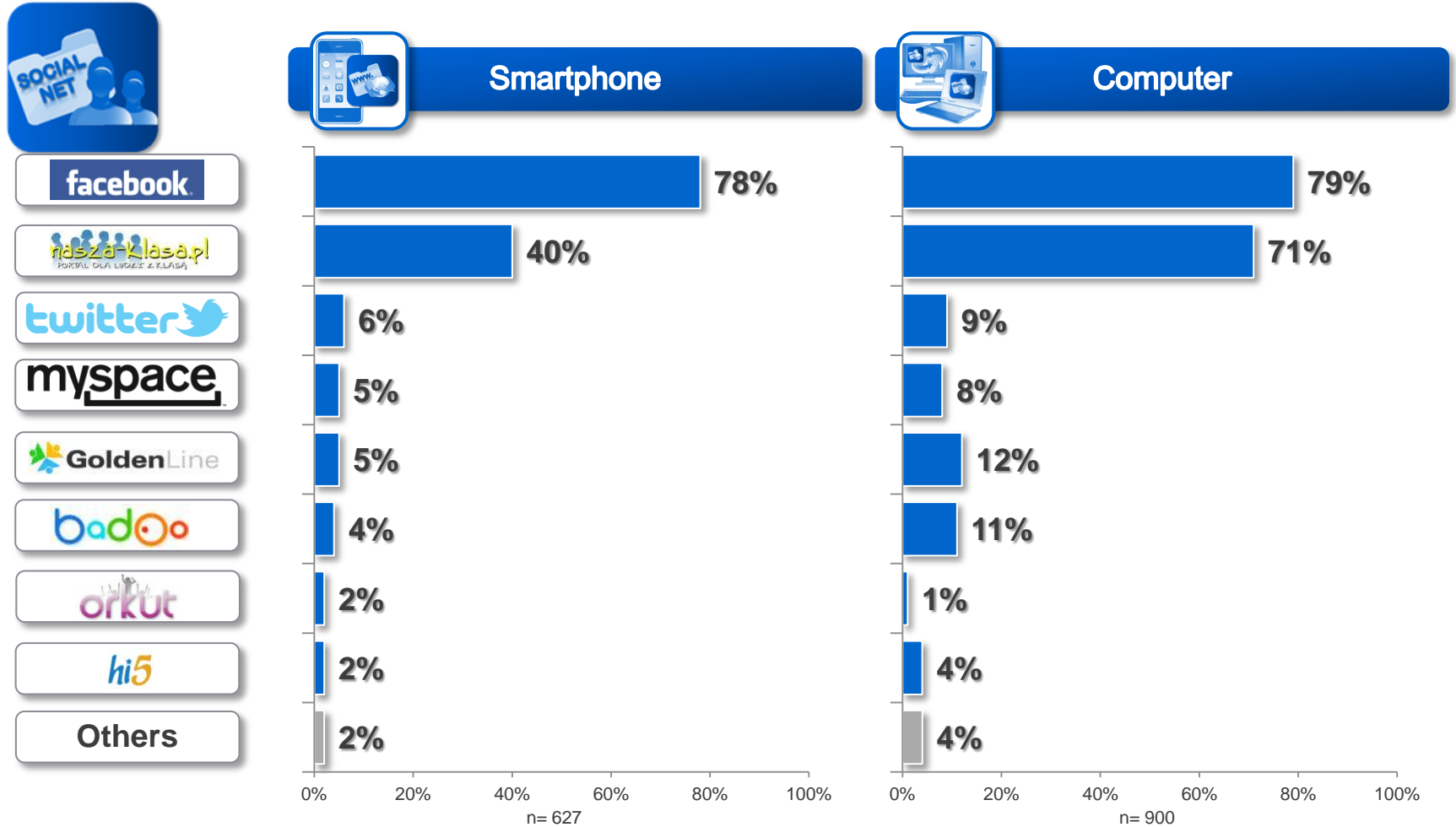
Computer



Used Social Networking Sites



» Facebook with highest usage with competitive advantage on smartphones – not on the Computer where Nasza Klasa is on 2nd place.



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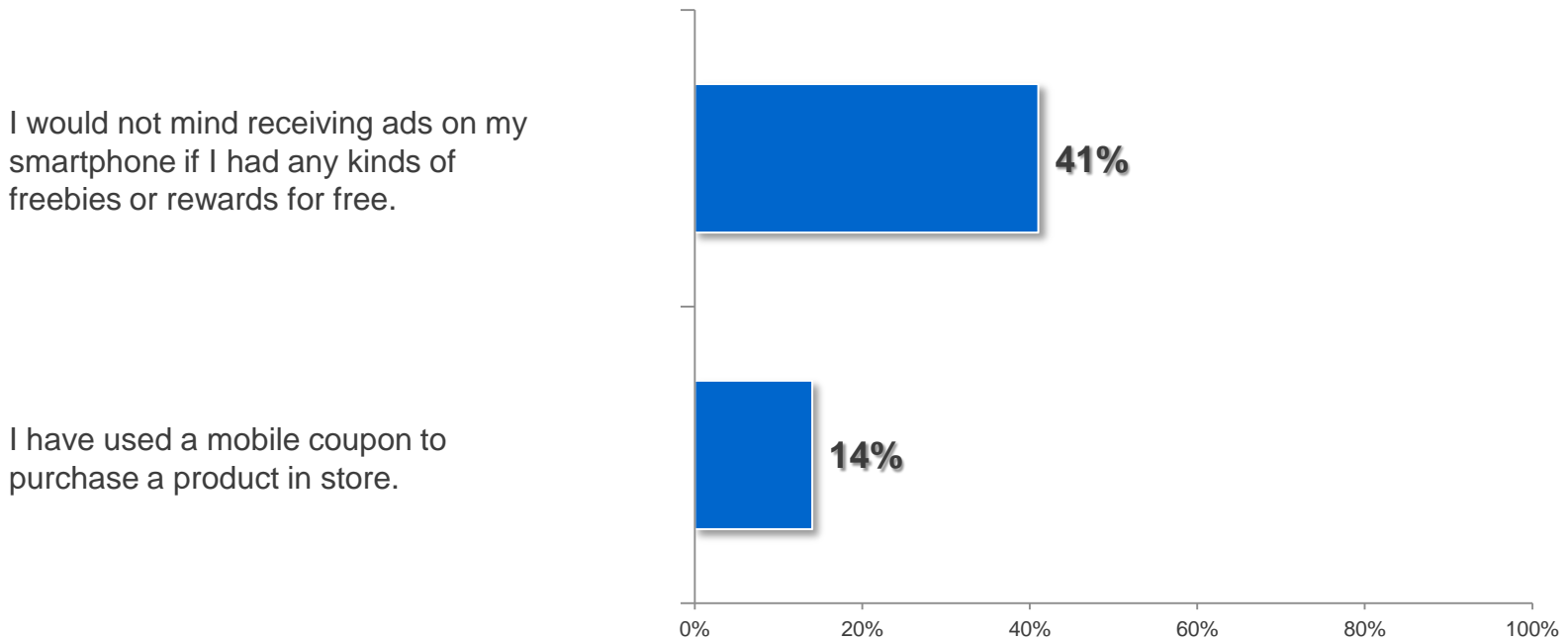
4.6 Mobile Advertising



Attitude towards Mobile Advertising



» More than 40% would permit advertising on their smartphone if they would get rewards or freebies.

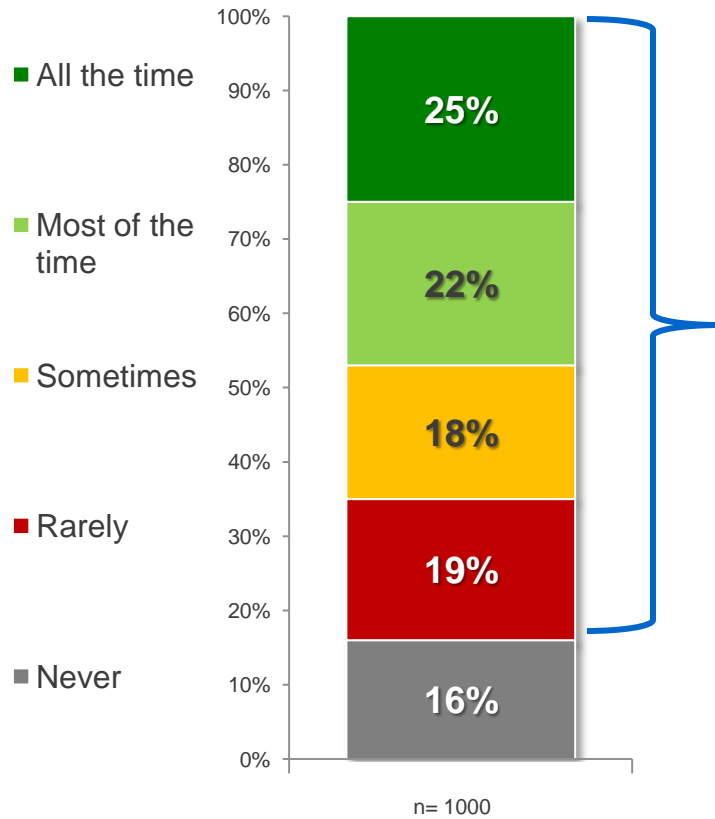


Awareness of Mobile Advertising

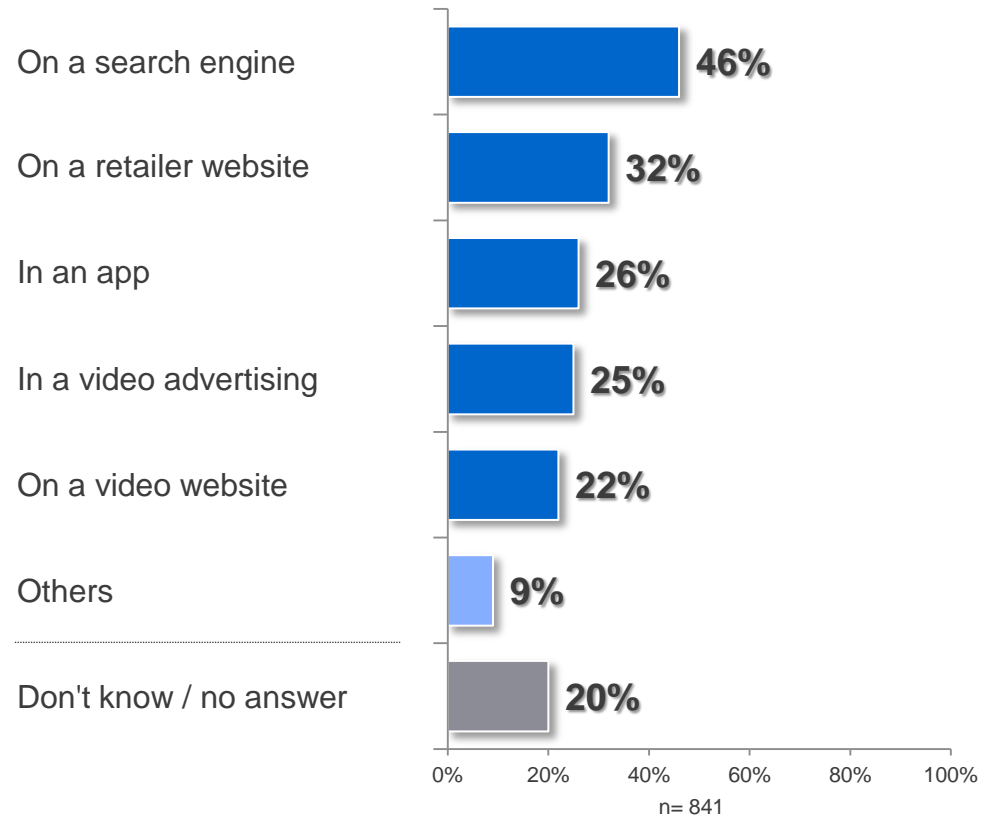


» 65% notice advertising at least sometimes – search engines with highest advertising recall.

Notice of Advertising



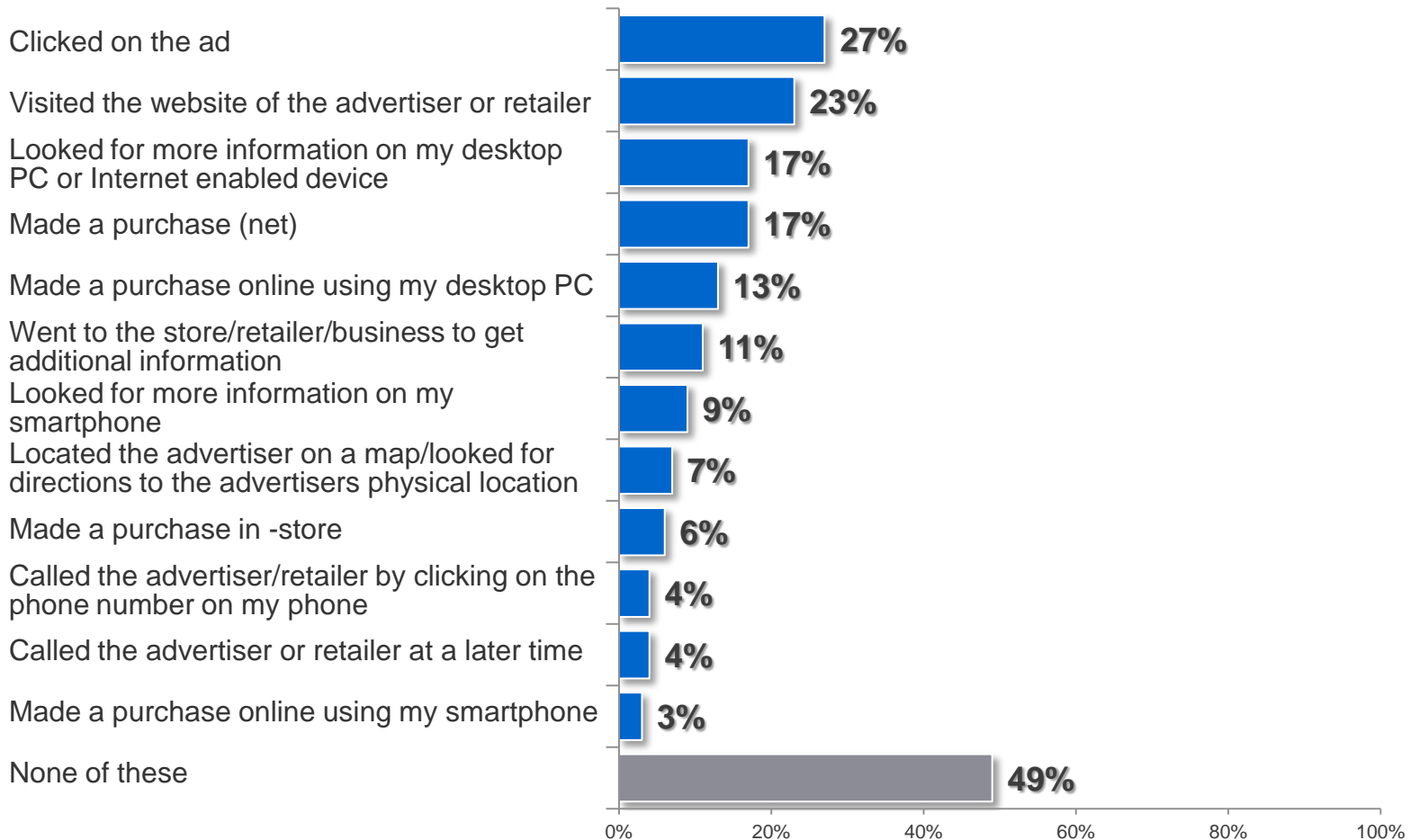
Where



Actions Taken on Advertising



» More than one half with “action after ad attention”.



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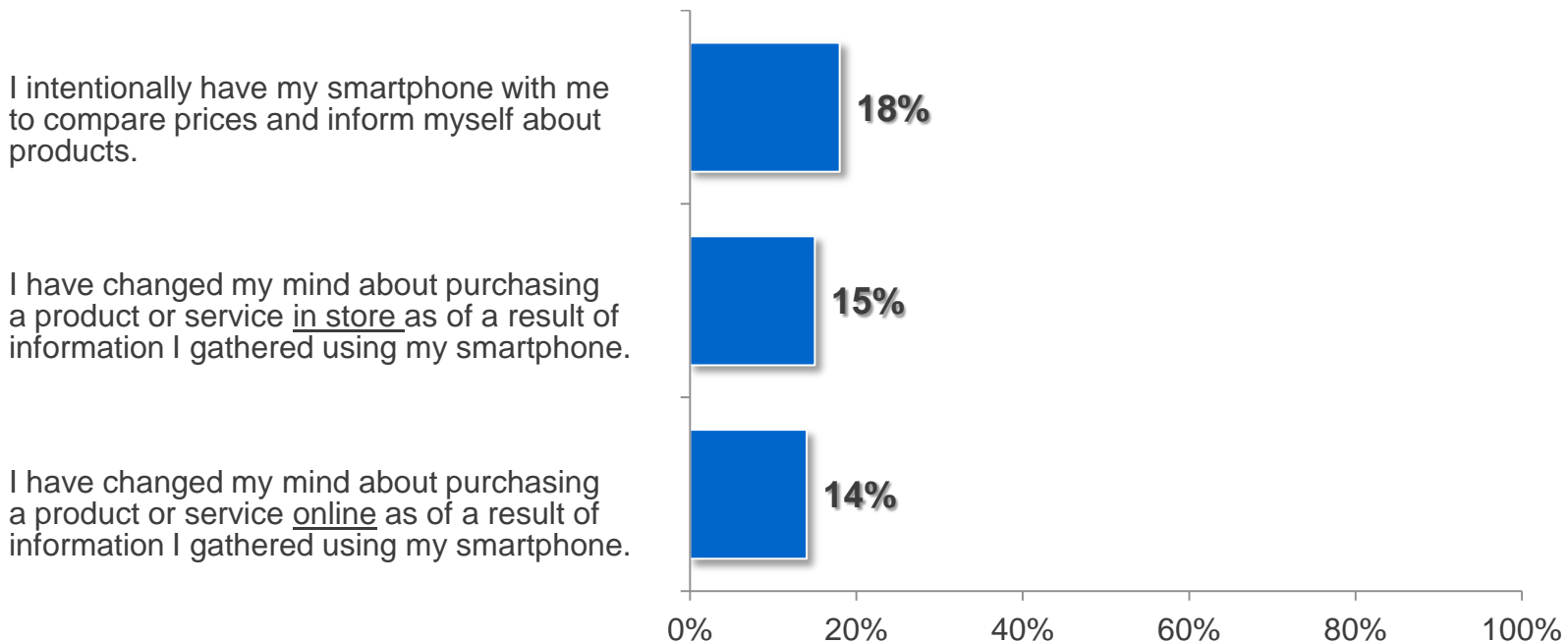
4.7 M-Commerce



Relevance of Smartphone for Shopping



» Almost 20% use the smartphone for price comparison or product information. Similar amount has changed their mind about purchasing a product as a result of information retrieved via smartphone.

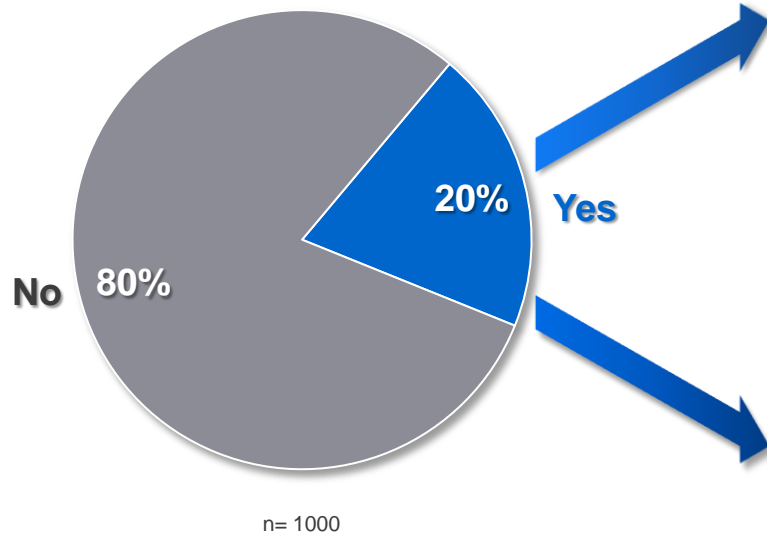


Purchase Behaviour via Mobile

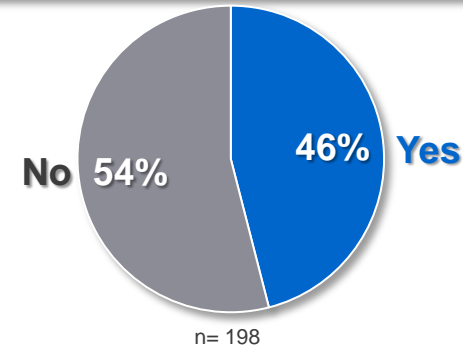


» 20% with mobile web purchase – 46% of them with a purchase in the past month.

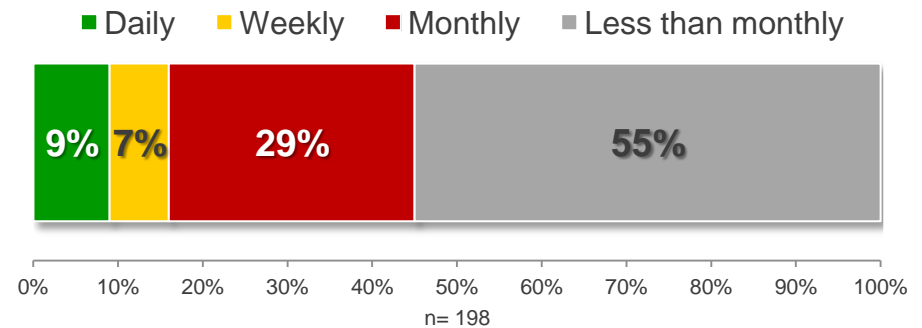
Product Purchase via Smartphone



Product Purchase in Past Month



Purchase Frequency



Kind of Goods purchased online/ offline



» After search on smartphone preference of purchase via computer.

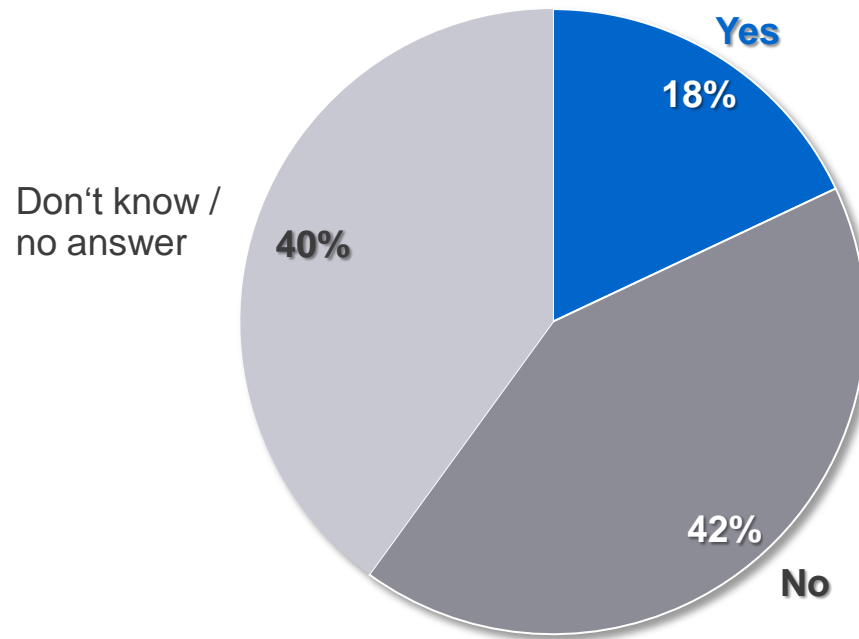
Researched via Smartphone

	and purchased via smartphone	and purchased via computer	and purchased offline	and didn't purchase it after research	Did not research this product via smartphone
All products	19%	33%	23%	34%	93%
Electronics	5%	13%	5%	13%	65%
Entertainment items	5%	10%	5%	11%	70%
Automobiles or auto-related parts or accessories	4%	8%	4%	10%	73%
Beauty and cosmetic items	4%	9%	5%	7%	75%
Clothing or Apparel	4%	12%	6%	10%	69%
Grocery and food items	4%	5%	4%	7%	81%
Home improvement products	4%	5%	3%	7%	80%
Financial products	3%	9%	4%	9%	75%
Home furnishings	3%	10%	4%	7%	76%
Household cleaning/laundry products	3%	4%	3%	6%	84%
Jewellery or watches	3%	9%	4%	6%	77%
Television service	3%	6%	5%	10%	76%
Business travel	4%	6%	3%	7%	79%
Leisure travel	3%	9%	4%	9%	75%
Wireless or cell phone service	5%	8%	5%	14%	67%
Office supplies products or technology	4%	7%	3%	7%	80%
Tickets	3%	11%	5%	10%	71%

Future plans M-Commerce



» Almost every fifth with higher expected purchase rate in the next 12 months via smartphone.

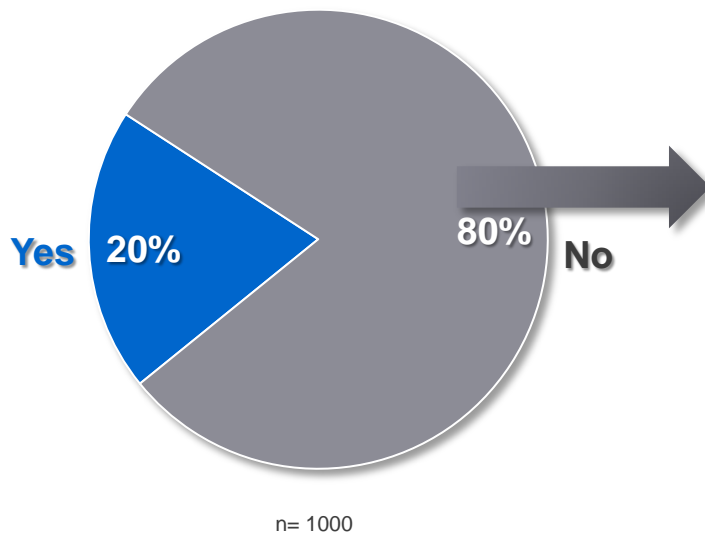


Barriers for M-Commerce

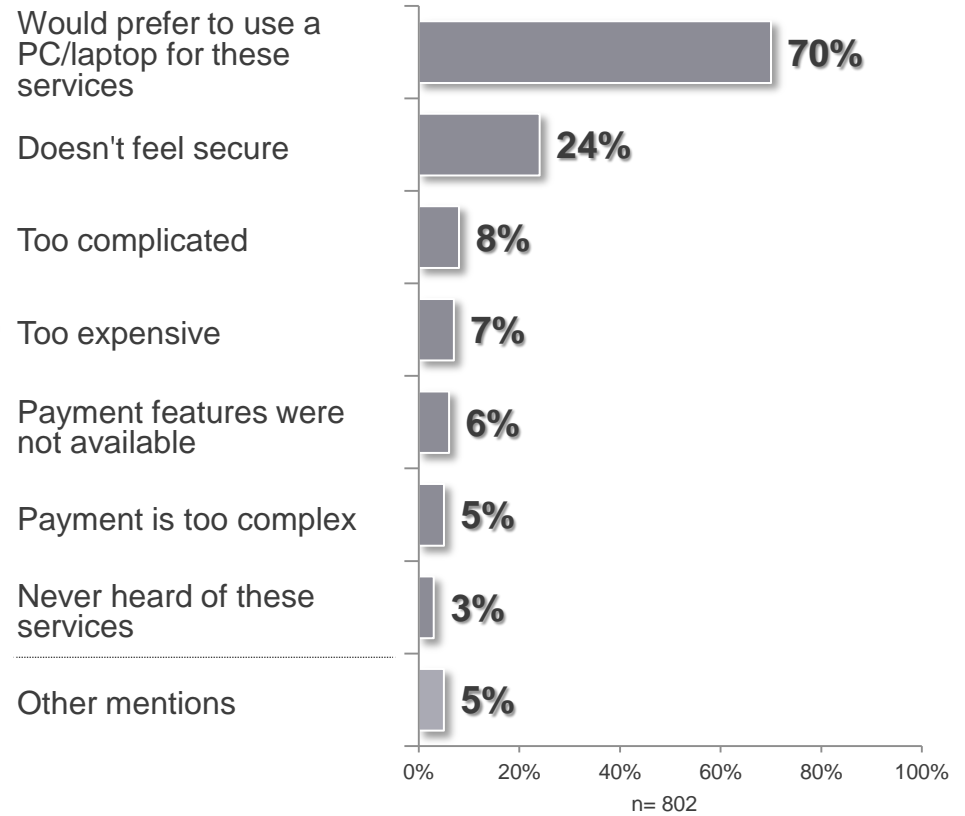


» Preferred closure of buying process via computer – almost one fourth with security concerns regarding purchase via smartphone.

Product Purchase via Smartphone



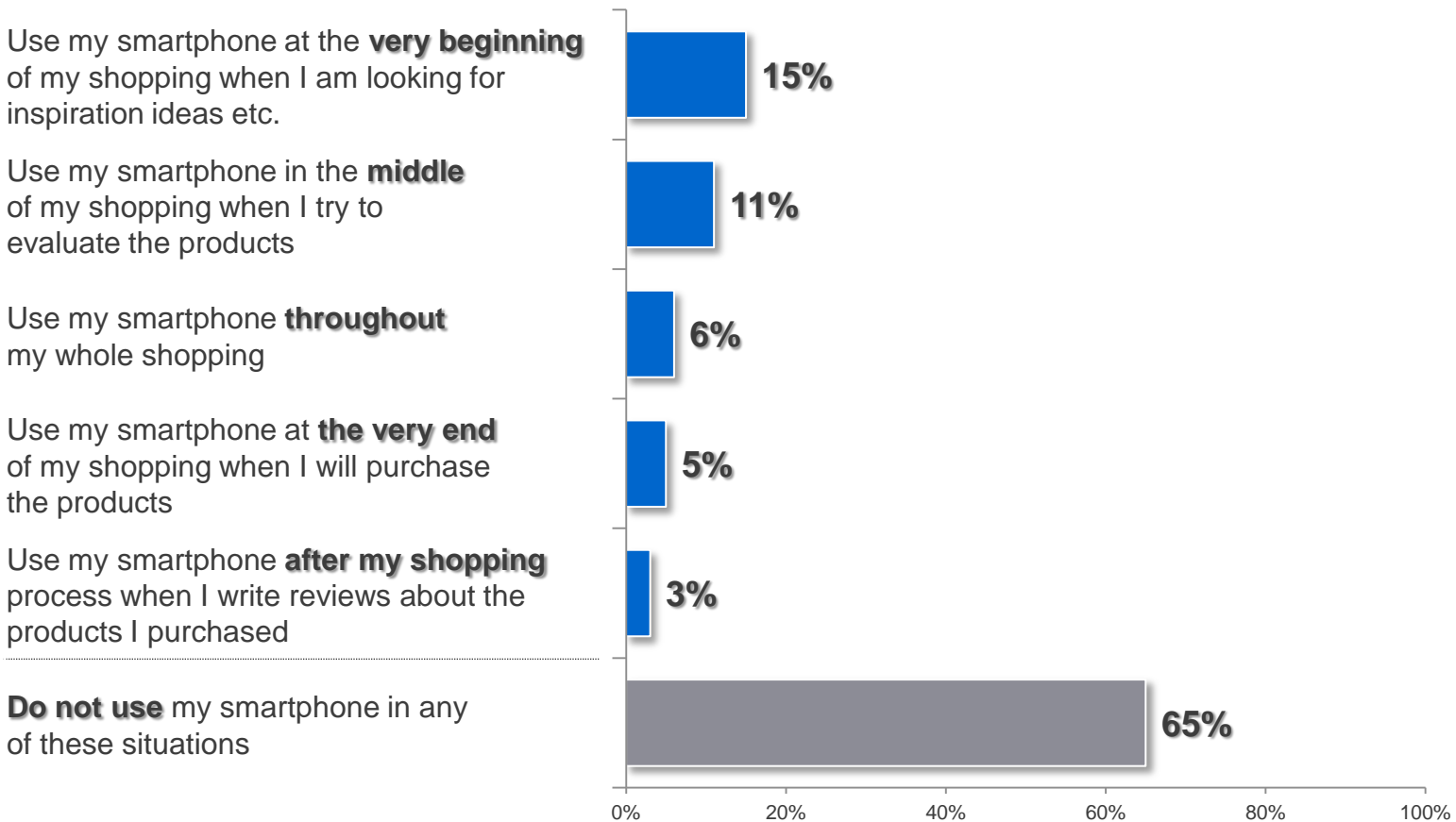
Reasons for NO Purchase via Smartphone



Purchases from Smartphone



» **35% use their smartphone during the shopping process – mostly at the beginning when looking for inspiration.**



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Demographics



Demographics 1/2



Private smartphone users
who use the internet in general

Age

18 - 24 Years	25%
25 - 34 Years	36%
35 - 44 Years	16%
45 - 54 Years	11%
55 + Years	12%
Average	Ø 34,6

Gender

Male	64%
Female	36%

Education

Low	6%
Middle	46%
High	47%

Employment Status

Working full-time	61%
Working part-time	9%
Housewife	4%
Student	13%
Retired	8%
Unemployed	5%

Demographics 2/2



Private smartphone users
who use the internet in general

Marital Status	Alone	36%
	Together	62%
Household size	1 Person	6%
	2 Persons	22%
	3 Persons	25%
	4 Persons	23%
	5 Persons and more	23%
Number of children	0 Children	57%
	1 Child	27%
	2 Children	12%
	3 Children and more	3%
Annual household income	Top (over zł 4.200)	33%
	Middle (zł 2.401 - zł 4.200)	41%
	Low (uo two zł 2.400)	26%
Region	Urban	77%
	Suburban	11%
	Rural	12%

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