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Mobile applications

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**MMA GERMANY
MOBILE CONSUMER
BRIEFING**

Executive Summary:

• This month we surveyed German mobile phone owners to discover how they were engaging with downloadable applications to mobile phones available through “app stores.” The results confirm Mobile apps are now a viable “medium within the medium”, offering significant reach for advertisers via free entertainment apps, and unmet consumer demand for new app utilities in many business categories.

Key Findings:

- 28% of mobile phone users had downloaded an application, with 8% downloading 10 or more
- The app “sub-medium” has enormous potential for advertisers: free applications account for 82% of downloads, with about 1 / 4 of these supported by ads
- In addition to significant reach, the sub-medium also offers frequency, as 19% of applications downloaded are used everyday
- Respondents’ most-used Apps offer: Entertainment (51%); are useful on the go (50%); and provide news or current information (49%)
- Next year, average app downloads may dip slightly, though largest number (27%) expect to download apps at same rate as this year

Insights For Marketers:

- Consider developing an app utility to connect mobile consumers to your offline business: interest in new apps among mobile consumers now extends to virtually every product category and vertical
- Its not enough to get your app downloaded; learn the app features that make consumers use them frequently, such as entertainment value and relevance while “on the go”

MMA-Lightspeed *Germany Mobile Consumer Briefing* – Mobile Applications



Key Questions Asked

- Number of applications downloaded
- Response for no use of applications
- Breakdown of free vs paid for applications
- Frequencies of use
- Future plans for mobile application download
- Brand of mobile phone
- Current mobile phone operator.
- Message (text) plan used
- Standard Demographics

Methodology

MMA ran an online survey on the Lightspeed Research omnibus in Germany from the 20 to the 24 August 2010. Respondents who owned a mobile phone were asked about the number and type of applications they had downloaded and what features and functions they preferred.

Access To Topline Report & Full Segmentation Tables

MMA members have access to the full top line report and segmentation tables, where results are cross-tabbed by standard demographics, mobile operator, and mobile handset manufacturer; some restrictions apply.)

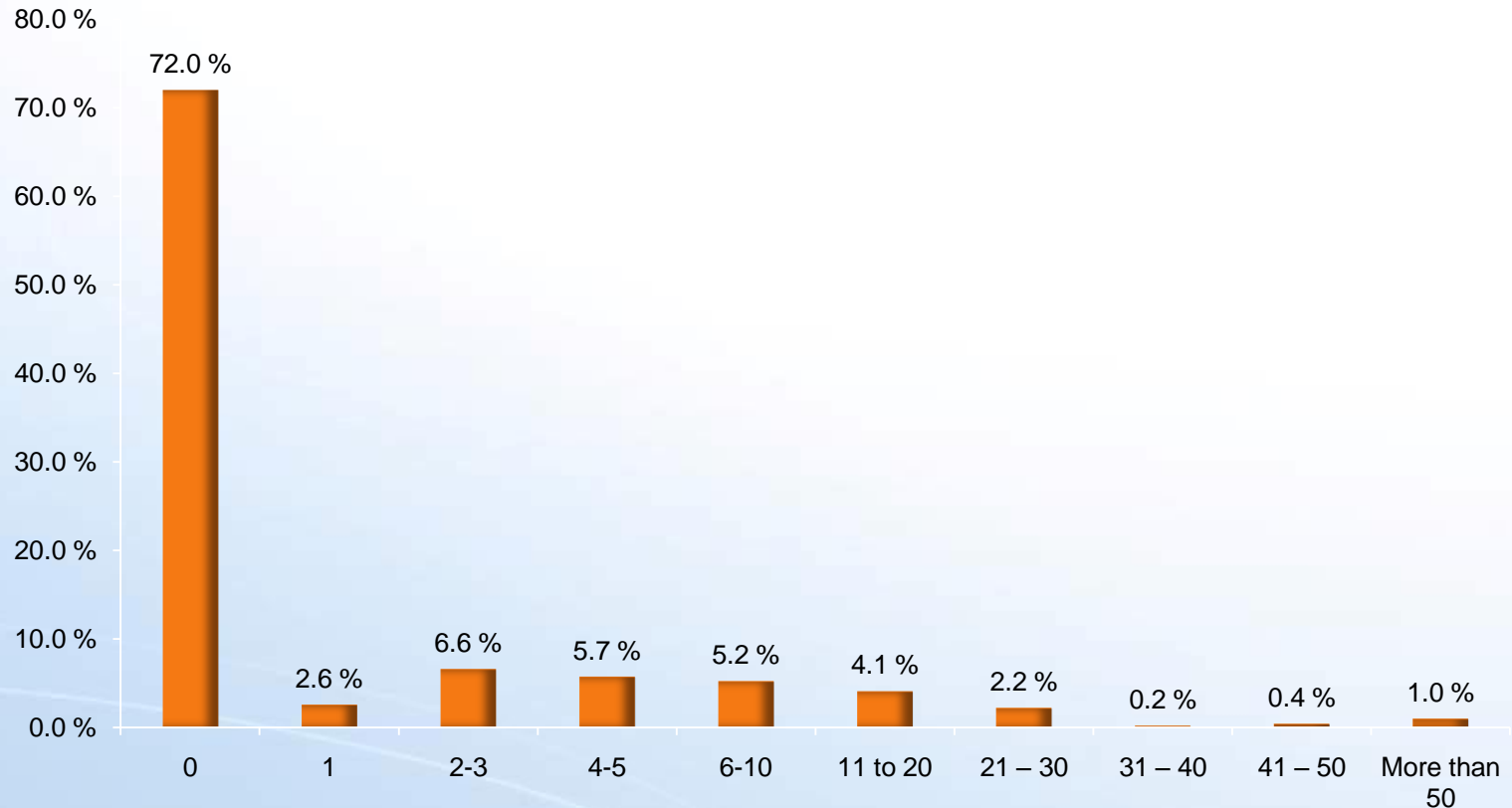
Non-members may purchase the reports at US\$1495.00 each by contacting

info@mma-germany.com

28% of mobile phone users had downloaded an application, with 8% downloading 10 or more

Number of applications downloaded onto the mobile phone

Base: All Mobile Phone Users



Males and younger mobile users were more likely to have downloaded an app

N = 1000

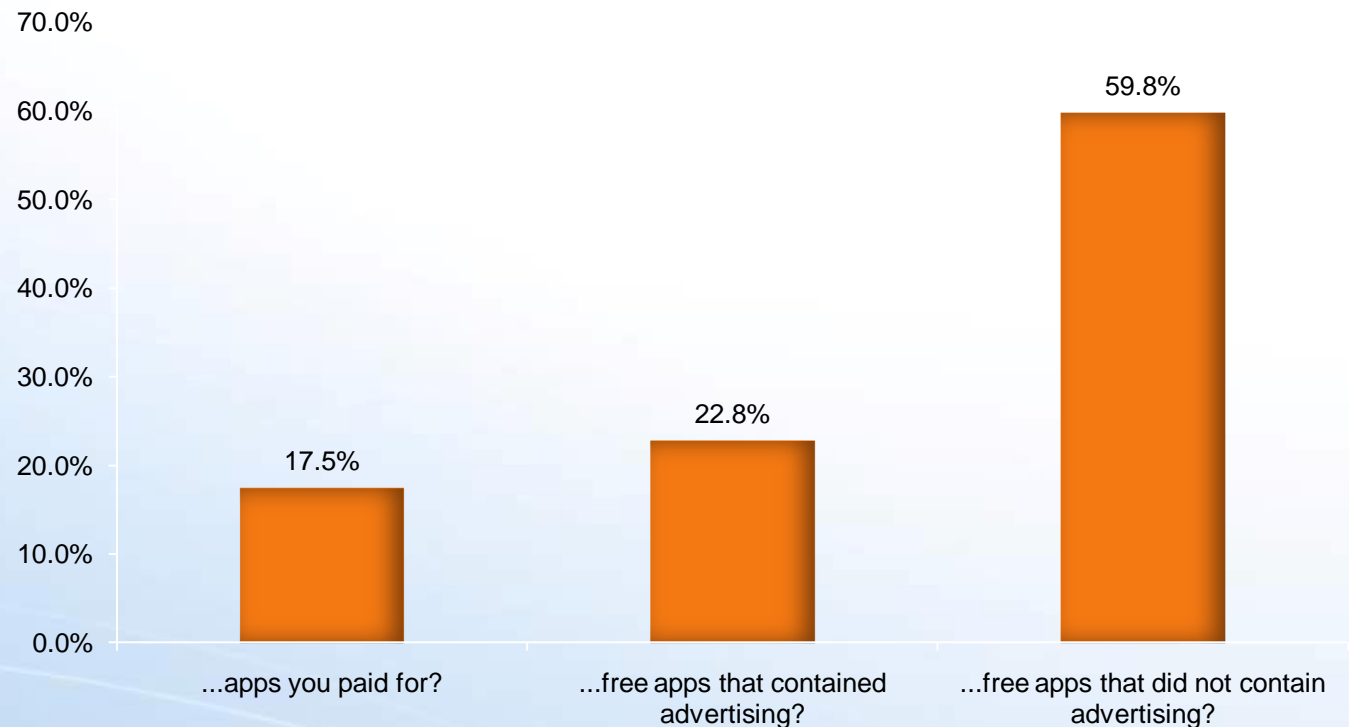
Q: About how many Mobile Apps in total have you downloaded onto your current mobile phone?

Free applications account for 82% of downloads, with about 1 / 4 of these supported by ads

Type of application downloaded

Base: Mobile phone users who had downloaded an application

Males were less likely to have paid for apps than females (14% vs 21%)



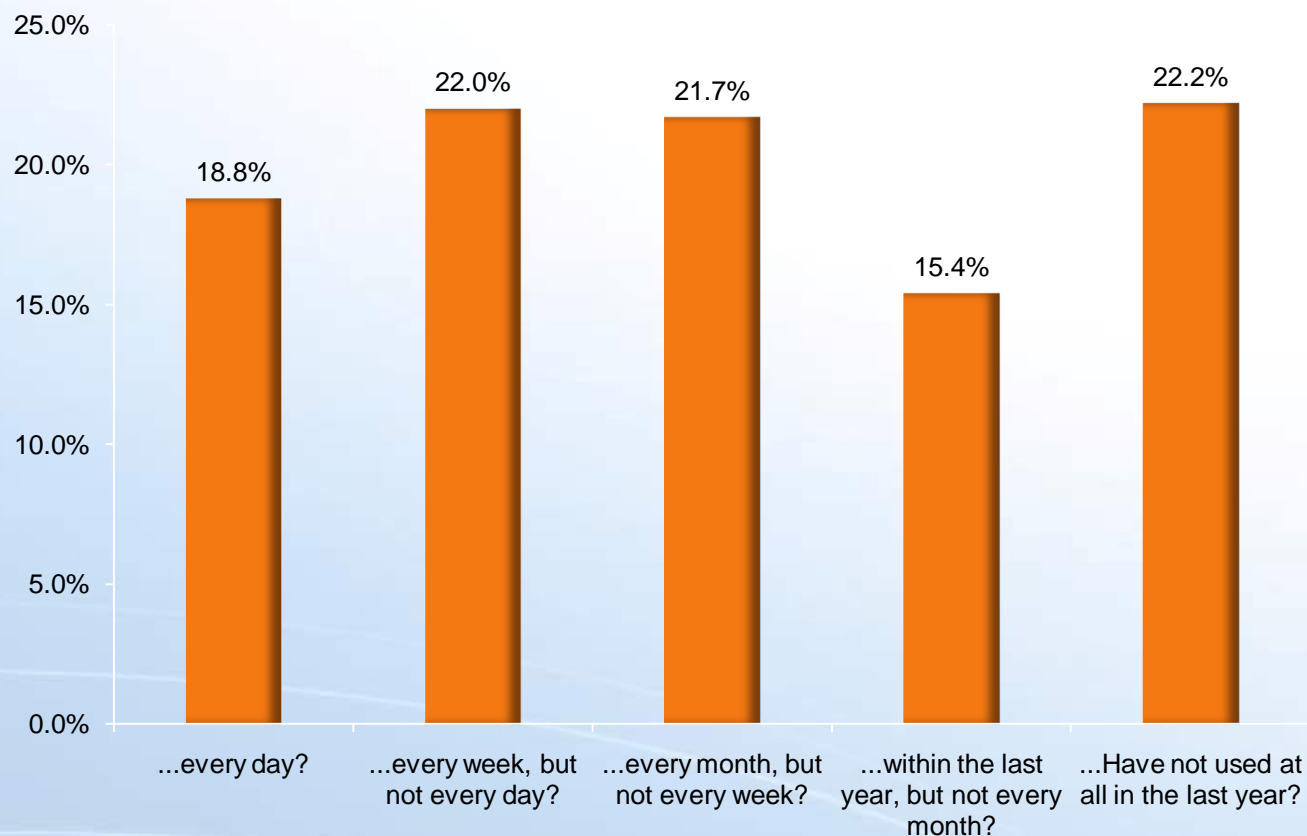
N = 280

Q: Thinking about all the mobile apps you downloaded onto your current cellphone, about what percentage were...

19% of applications downloaded are used everyday

Frequency of application use

Base: Mobile phone users who had downloaded an application



Younger mobile phone users use more of their applications every day

18-34 – 25%
35-54 – 19%
55-64 – 8%

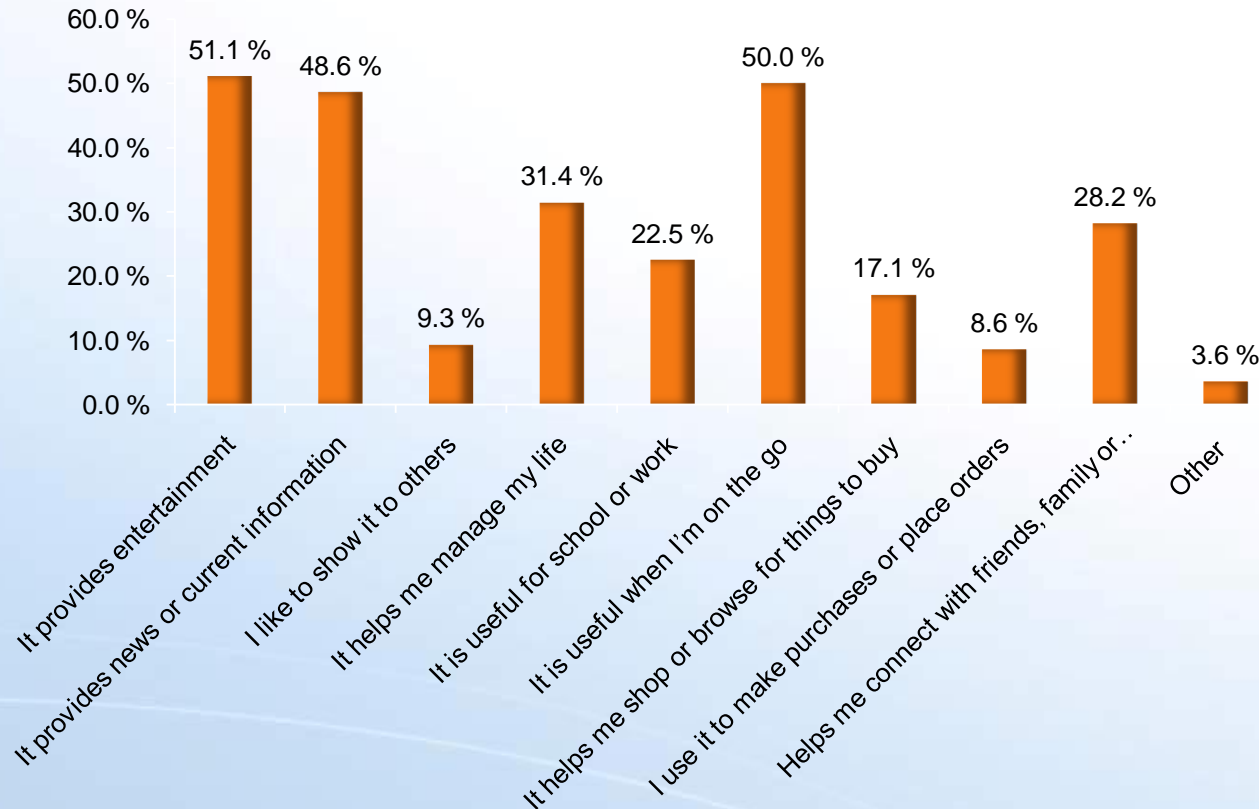
N = 280

Q: What percentage of the apps you've downloaded onto your current cellphone do you use ...

Respondents' most-used Apps offer: Entertainment (51%); are useful on the go (50%); and provide news or current information (49%)

Popular functions of applications

Base: Mobile phone users who had downloaded an application



Providing news or current information was more popular with males (53%) compared to females (42%), Females use the application for school or work more than males (26% vs 20%)

N = 280

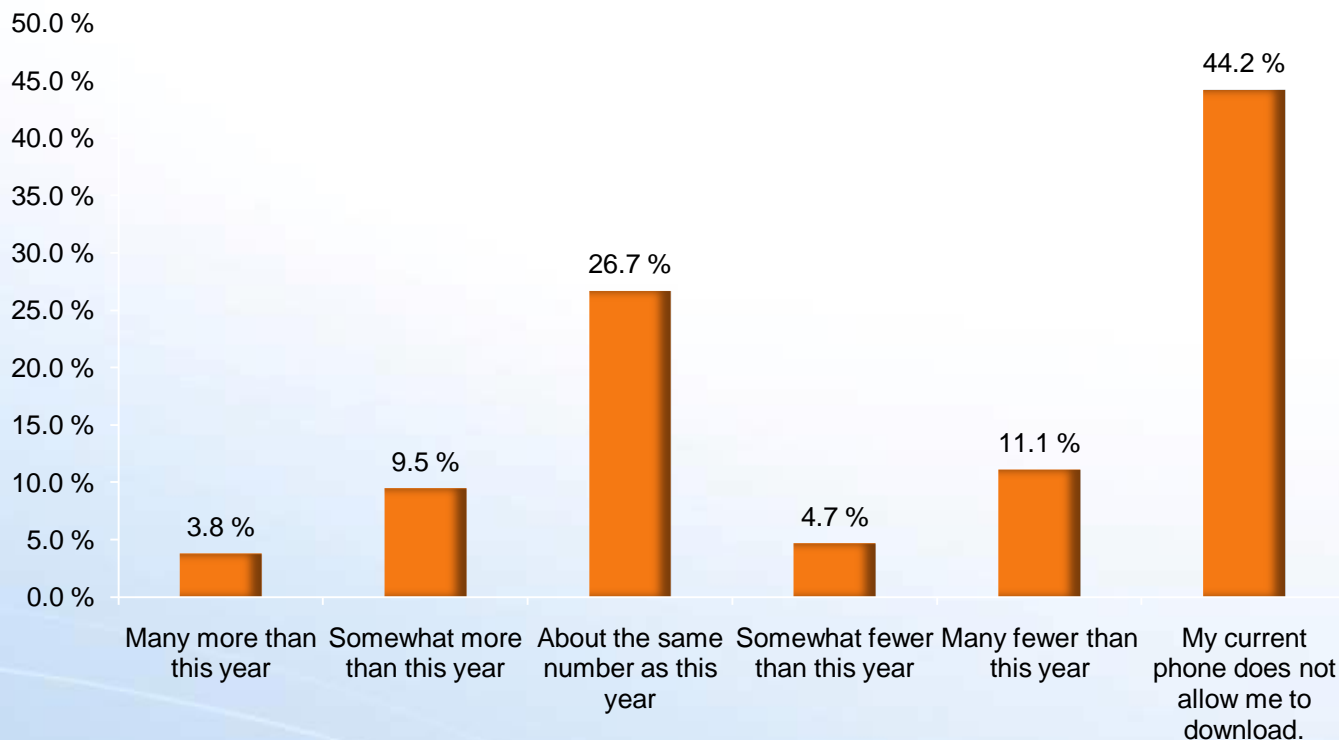
Q: Thinking about the mobile app you downloaded and use most often, which of the following describes the functions and features of this app?

Next year, average app downloads may dip slightly, though largest number (27%) expect to download apps at same rate as this year

Expectations For Number of Downloads In 2011

Base: All Mobile Phone Users

Males and younger mobile users were more likely to download more applications next year



N = 1000

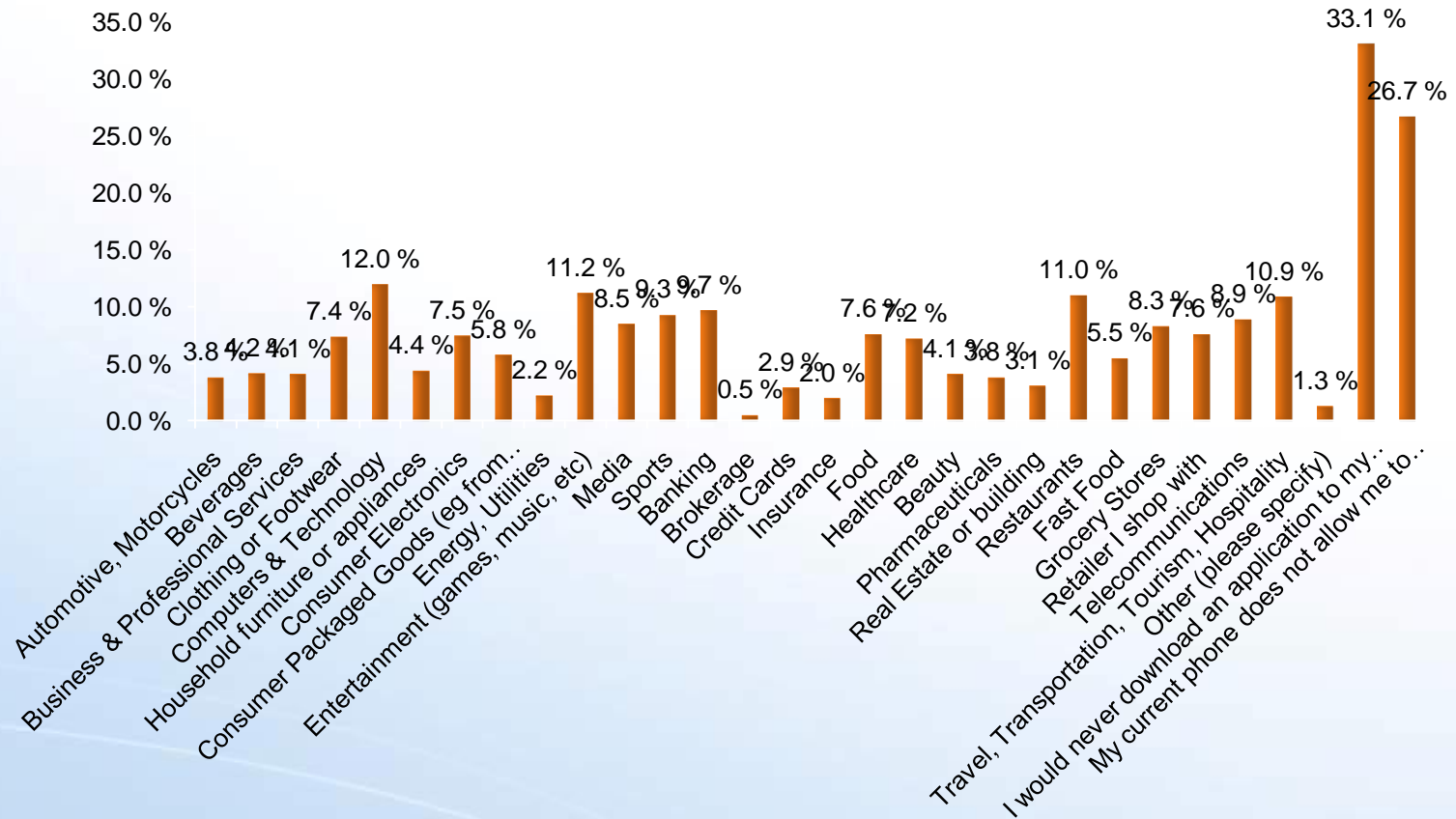
Q: Thinking about the next year, do you expect to download more apps, fewer apps, or about the same number as this year?

Next year, downloaders will seek apps for Computers and technology (12%) followed by entertainment; restaurants (both 11%)

15% of males and 4% of females were interested in downloading a banking application

Popular application categories

Base: All Mobile Phone Users



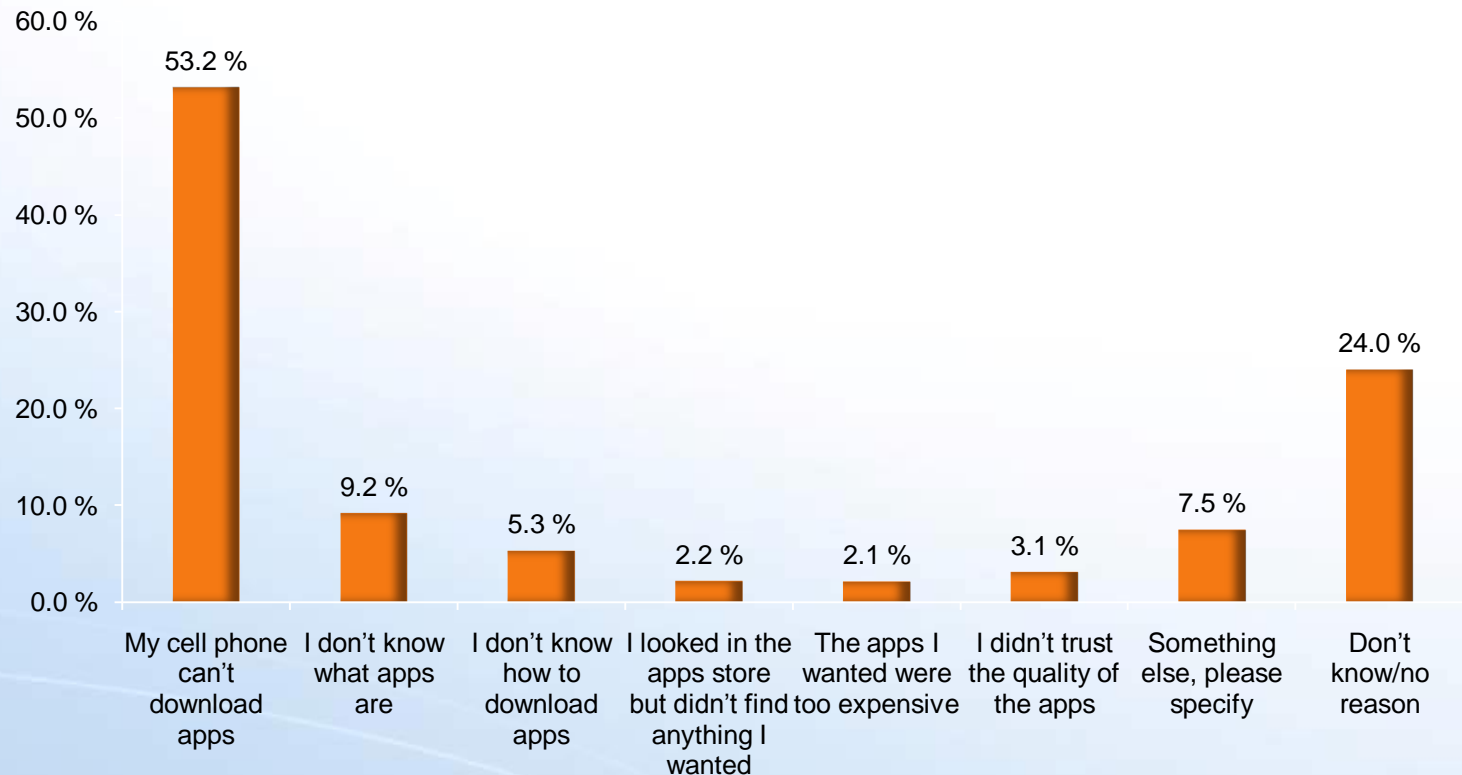
N = 1000

Q: For which of the following categories of goods or services would you be most interested in downloading a new or additional app over the next year, assuming it had the features you wanted, and it was not something you already had?

53 % of respondents who had not downloaded an app blamed their mobile phone's lack of capability

Reasons for not downloading an application

Base: Mobile phone users who had not downloaded an application



11% of 35-64 year olds don't know what apps are compared to 4% of 18-34 year olds

N = 720

Q: Which of the following reasons explain why you have not downloaded any apps onto your current cell phone?

ABOUT MMA-LIGHTSPEED *MOBILE CONSUMER BRIEFINGS*:



Each month, MMA leverages Lightspeed Research's online survey panel to survey a demographically representative sample of 1000 adult consumers about their latest mobile marketing behaviours and opinions. Each *Consumer Briefing* contains a 2-3 page executive summary, all survey questions asked, and approximately 50 tables of detailed results. Survey responses are provided not only in aggregate, but are also cross-tabulated by standard audience demographics, such as age, gender, and income, as well as wireless carrier and handset manufacturer. Together, MMA and Lightspeed Research aim to make these briefings uniquely powerful tools for creating up-to-the-minute mobile campaigns, and are available free to MMA members. To learn more about MMA's market research benefits, visit MMA's [Research Home Page](#) or contact Peter A. Johnson, Vice President of Market Intelligence, at peter.johnson@mmaglobal.com. MMA *Consumer Briefings* on this topic are also available for the US, French, and German markets.

ABOUT LIGHTSPEED RESEARCH:

Lightspeed Research was launched in May 2000 by Kantar, one of the world's largest research, insight and consultancy networks and part of WPP. Through our online global panels and products, we deliver valuable market insights to help businesses make informed decisions. We actively manage our panels in North America, Europe, and Asia Pacific to provide responsive and engaged survey participants. Lightspeed Research provides customers with ad-hoc and continuous online research services as well as access to a weekly global online Omnibus. For more information, contact us directly on mma@lightspeedresearch.com or visit our website at www.lightspeedresearch.com.

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