



App Economy – Paradigmenwechsel oder Evolution?

Die Nutzer von Apps: Nutzertypen, Nutzungsverhalten, Usability, Zahlungsbereitschaft



18.11.2011

Sven Koebler

MobiLens Methodik Grundlagen – Deutschland

Sample

- **Monatliche** Befragung von **mehr als 5.000 Handybesitzern in Deutschland** (Befragung von mehr als 23.000 Handybesitzern der EU5-Region monatlich - Drei-Monats-Durchschnitt von über 39.000 Befragten in den USA; 70.000 in der EU5-Region (UK, F, D, ES and I))
- Die comScore MobiLens Panel bestehen aus national repräsentativen Mobilfunknutzern
- Um demografische Repräsentation sicher zu stellen, wird ein **landesspezifisches Quotenauswahlverfahren** angewendet (basierend auf Zensusdaten, regionsabhängige Geschlecht- und Altersverteilung – in Zusammenarbeit mit unabhängigem Research-Unternehmen, Face-to-Face Interviews)
- Befragte sind **13 Jahre oder älter**
- Jeden Monat werden **unterschiedliche Personen** befragt (Digital Fingerprinting und hauseigene Algorithmen)
- Kontinuierliche Überprüfung der Stichproben und Erhebungsmethoden durch umfangreiche Analysen und Markt-Validierung, einschließlich Vergleichen mit Mobilfunkanbieter-Marktanteilen, Marktanteilen der Gerätehersteller, Download-Aktivitäten und anderen Nutzerdaten
- Befragung konzentriert sich **ausschließlich auf das meistgenutzte Gerät**
- Bei der MobiLens-Befragung handelt es sich um eine **Online-Umfrage** mit einer dynamischen Steuerung der Befragung

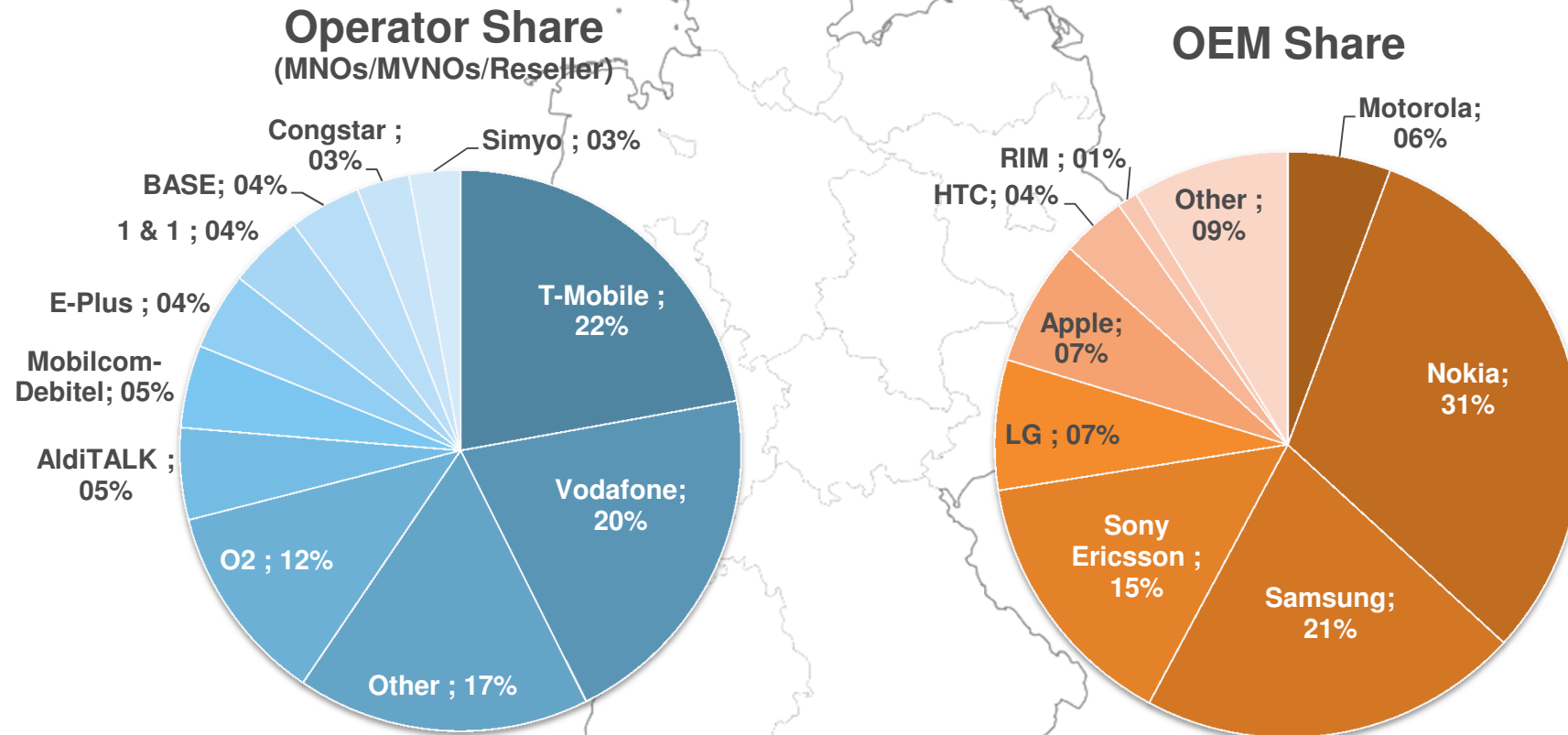
Der deutsche Mobilfunkmarkt - Überblick

Stand des deutschen Mobilfunkmarkts im August 2011 (3-Monatsdurchschnitt)



Der deutsche Mobilfunkmarkt - Überblick

Gesamt Mobilfunkmarkt Deutschland: 57,500,000



MobiLens data is derived from an intelligent online survey of a nationally representative sample of mobile subscribers age 13 and above. Data on mobile phone usage refers to a respondents primary mobile phone and does not include data related to a respondent's secondary device

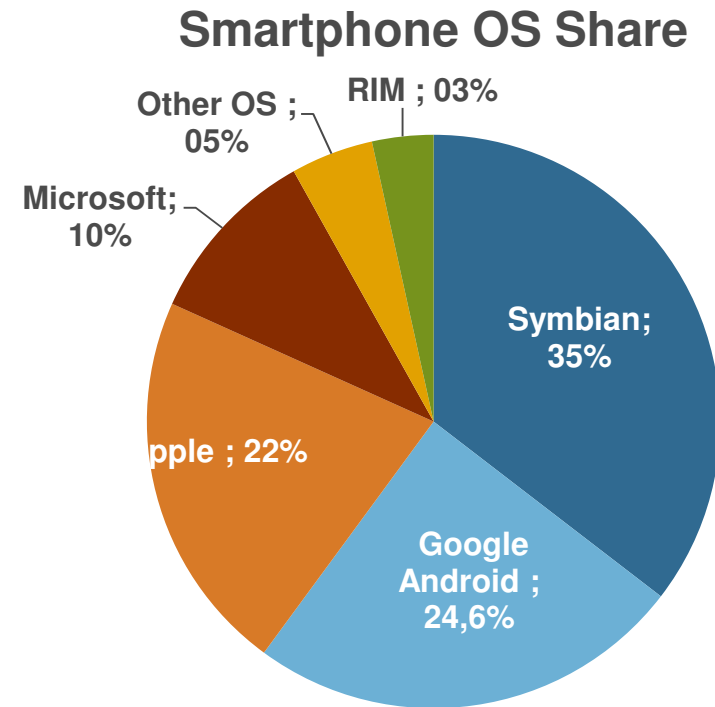
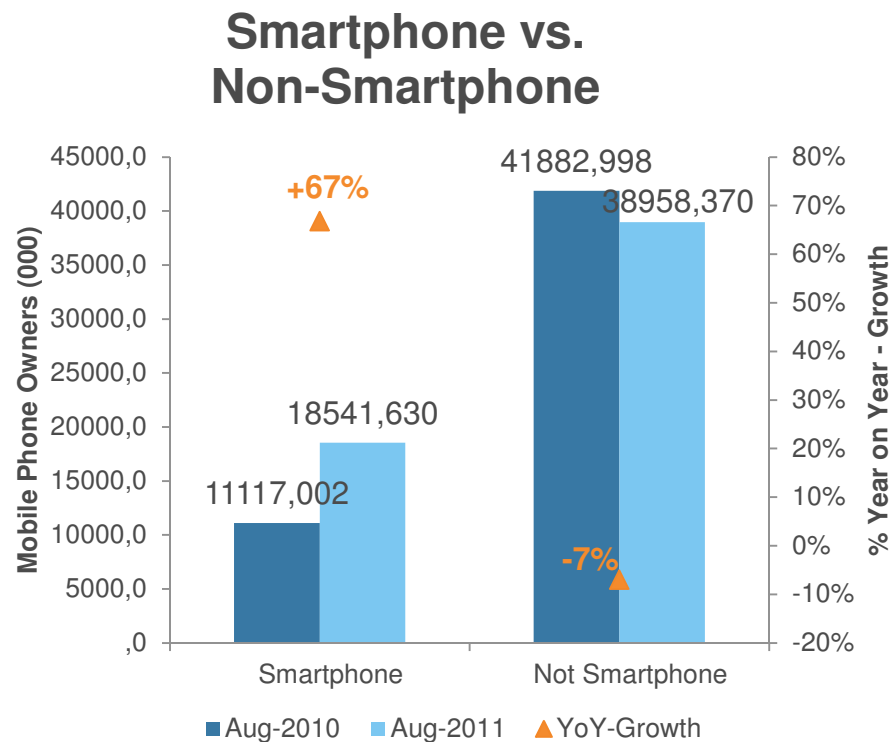
Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15,169

Smartphones und Betriebssysteme

- Im August 2011 nutzten 18,5 Millionen Handybesitzer Smartphones (32% vom Gesamtmarkt)
- Das Smartphone nimmt auch weiterhin an Beliebtheit zu: Penetration wuchs um 67% p.a.
- Smartphones mit dem Symbian Betriebssystem machen noch immer die Mehrheit aus (35,4%).



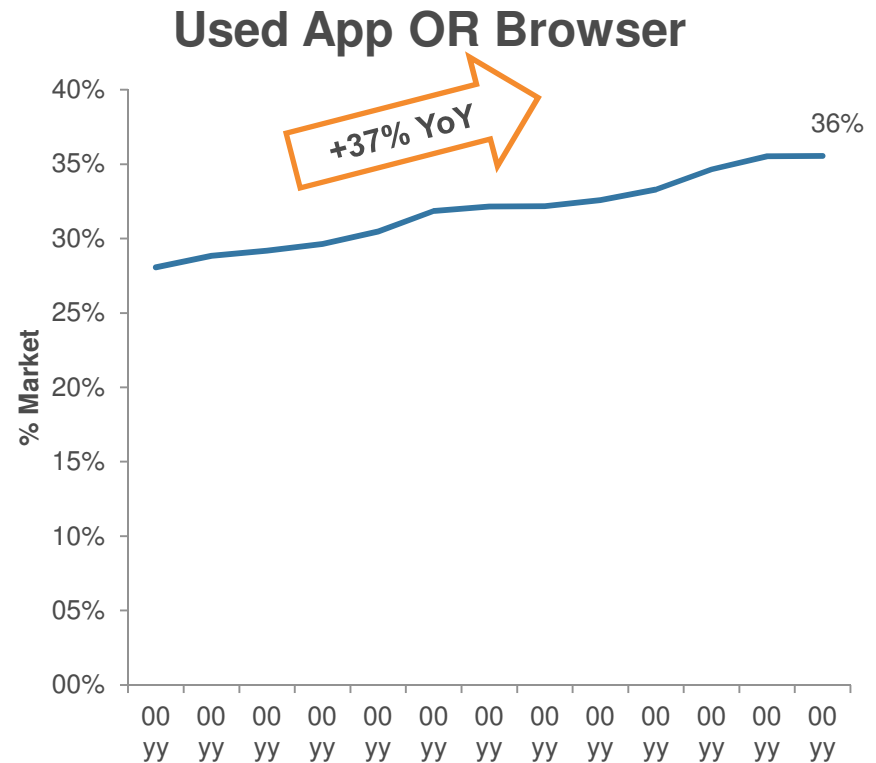
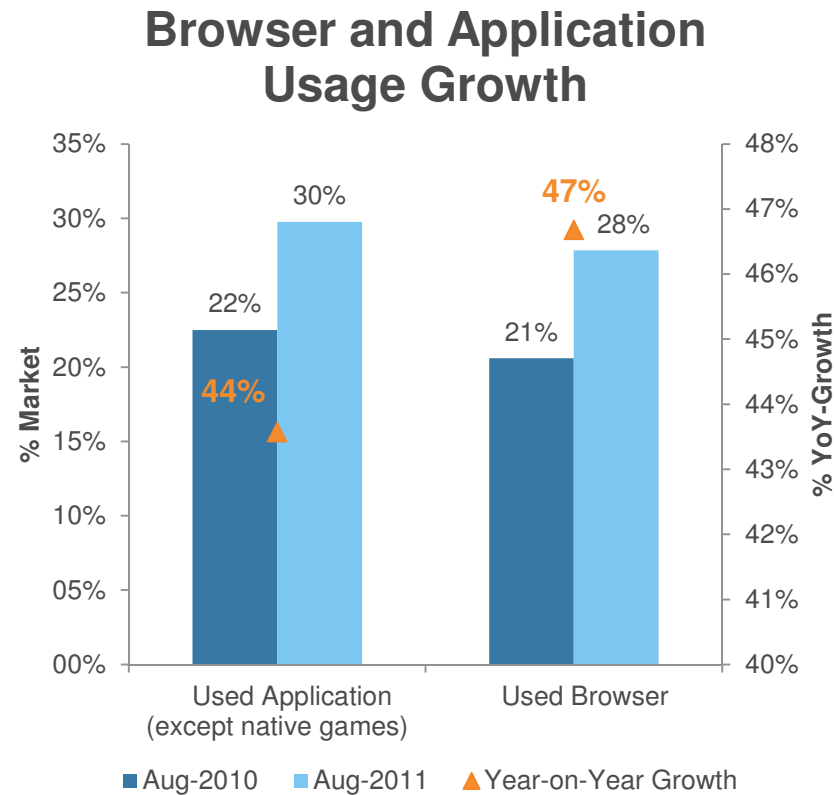
Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15,169

Die Nutzung von Anwendungen und mobilem Browser wächst kontinuierlich

- Nutzung von Anwendungen und mobilem Browser zeigt kontinuierliches Wachstum, beides auf ähnlichem Level.
- 35.5% des deutschen Mobilfunkmarkts nutzen mittlerweile Anwendungen oder den Browser ihres Handys. Nutzung stieg um 37% (2010 zu 2011) an.



Product: MobiLens

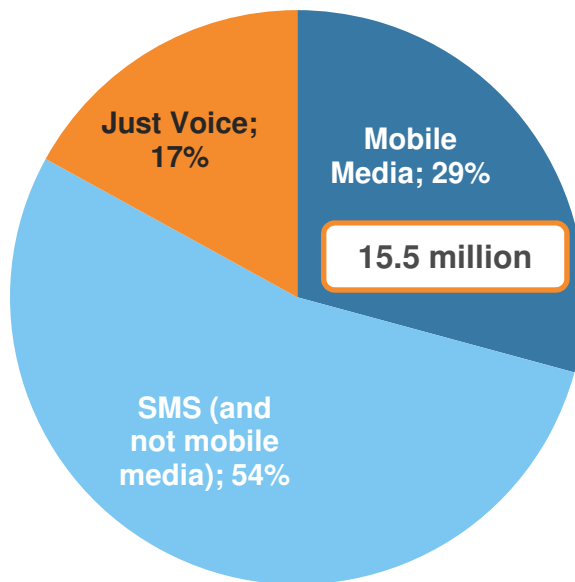
Data: Three month average ending August 2011

Country: DE, N=15,169

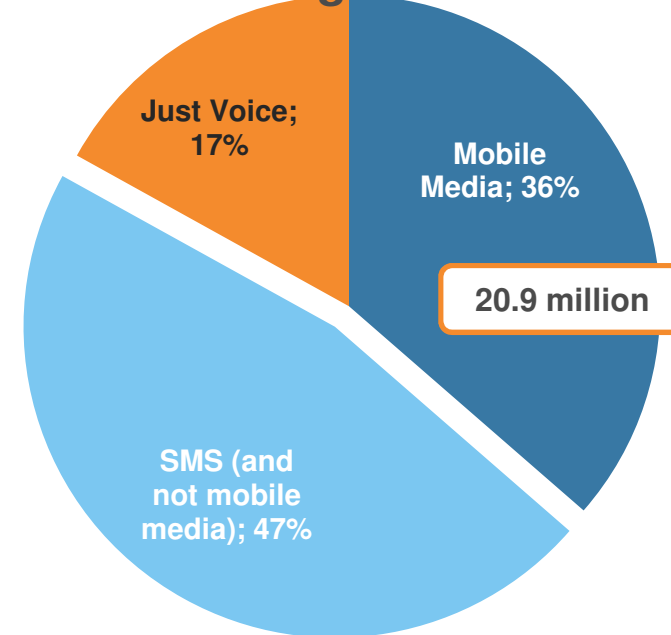
36.4% der deutschen Handybesitzer surfen das mobile Internet, nutzen Anwendungen oder laden Inhalte herunter (Mobile Media Nutzer)

- Die Anzahl der Personen, die nur SMS versenden (und Mobile Media nicht nutzen) ist im letzten Jahr um 7,2 %Punkte gefallen.
- Die Mobile Media Nutzung ist 35% gestiegen und August 2011 brachte 5,4 Millionen zusätzliche Mobile Media Nutzer.

**Mobile Market Segments
August 2010**



**Mobile Market Segments
August 2011**



Mobile Media User = Used browser, application, native email, stream or download music and broadcast or on demand video (does not include SMS)

Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15,169

Top 10 Recently Acquired Devices (Acquired Within Past 6 Months) – Germany



1. Apple-iPhone 4 16GB

500,000



2. Apple-iPhone 4 32GB

253,000



3. Samsung-Galaxy S I9000
8GB
247,000



4. Samsung-S5230

199,000



5. Samsung-Galaxy S II 16GB

143,000

6. Samsung-Star S5230

139,000



7. Nokia-N8

126,000



8. HTC-Desire HD

124,000



9. Motorola-Defy

110,000



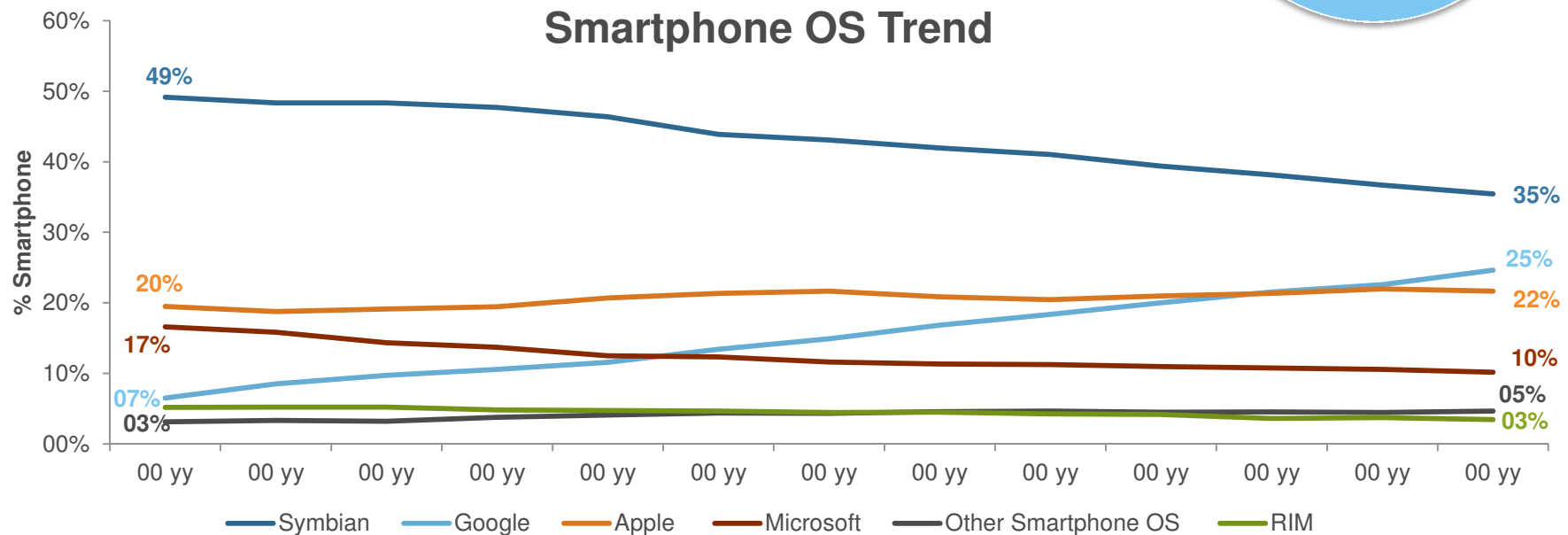
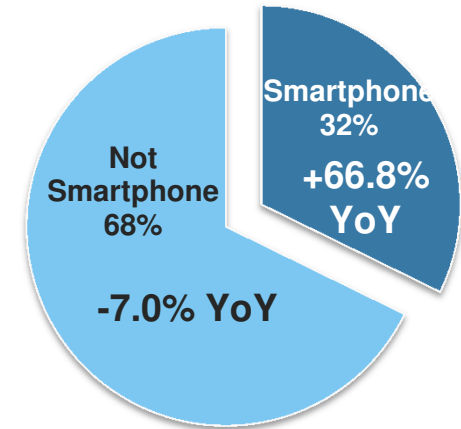
10. Apple-iPhone 3G S 16GB

106,000



Google's Android Has Rapidly Grown its Smartphone Market Share and Has Taken the Lead in the Race with Apple

- While the number of Smartphone owners has increased 67% year on year, there have been significant changes in the share by operating system.
- Google's Android has rapidly grown to represent 24.6% of Smartphone owners in Germany, overtaking Apple for the first time. With 21.7% Smartphone share, Apple takes 3rd position.
- Symbian based devices still account for the highest amount of Smartphones, however, market share has dropped rapidly from almost 50% to just over 35%.



Product: MobiLens

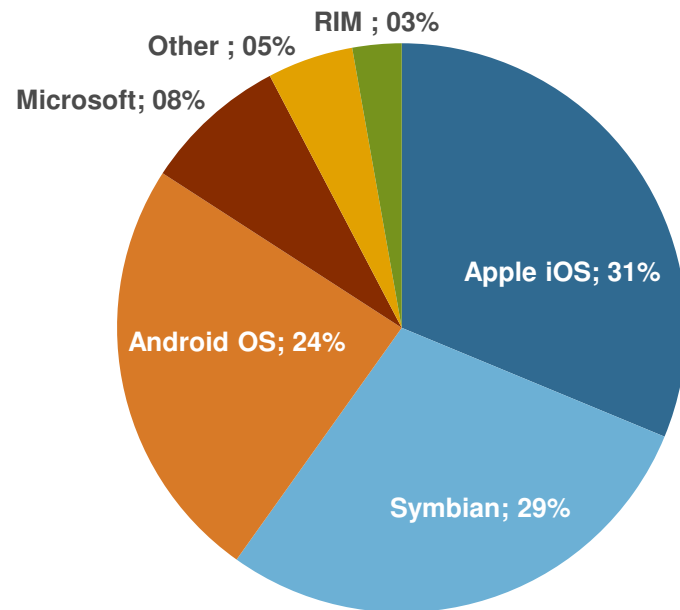
Data: Three month average ending August 2011

Country: DE, N=15, 169

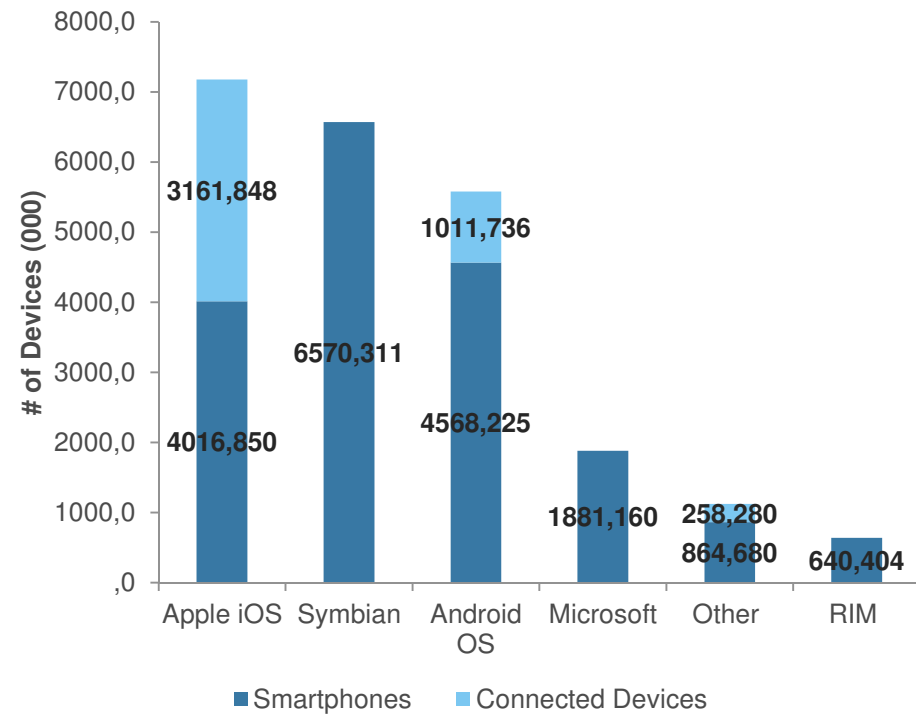
iOS Platform Leads the Market in Installed Base For Tablet Devices

- Total number of Primary Smartphone Handsets and Connected Devices (excluding e-reader): 22.9 million devices
- iOS based devices account for 31.2% of this combined installed base.

Platform Installed Base Share
(Smartphones & Connected Devices)



Platform Split by Device Type



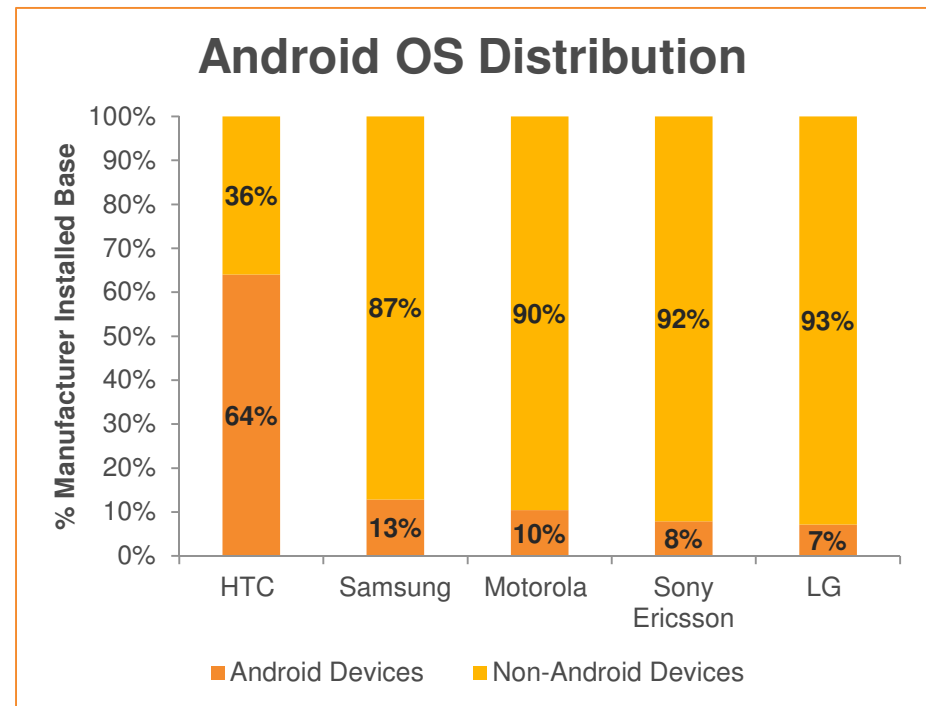
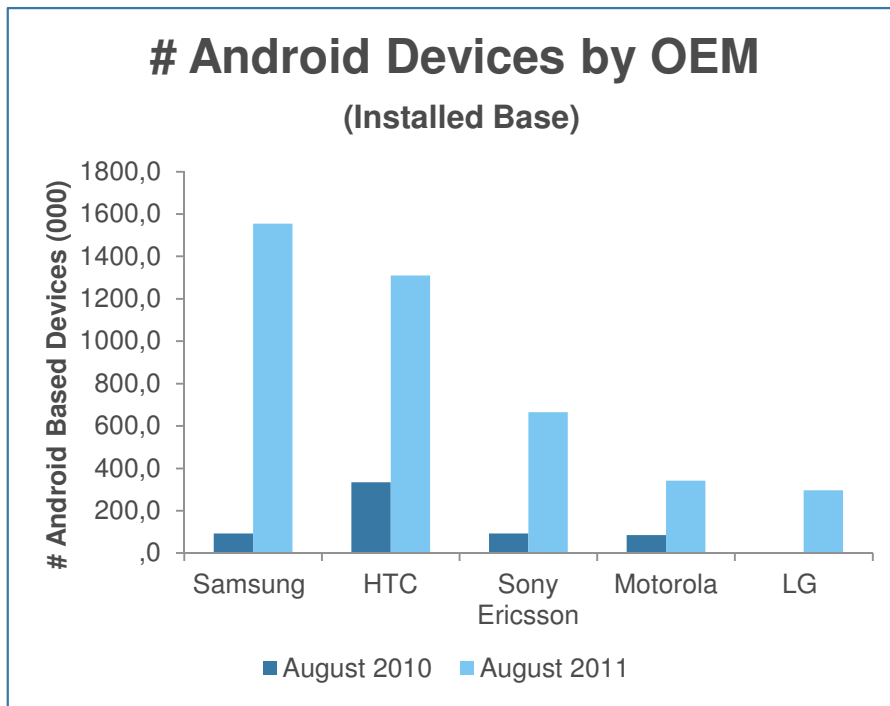
Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15, 169

Android OS Distribution by OEM – Installed Base

- Samsung currently has the highest amount of Android based devices installed, followed by HTC.
- When looking at the total number of devices installed, Android devices only account for 10% of Motorola’s device range, whereas 64% of HTC’s installed devices run on Android OS.
- It will be interesting to see how or if this will change in the coming year, after the Google takeover of Motorola Mobility is complete.



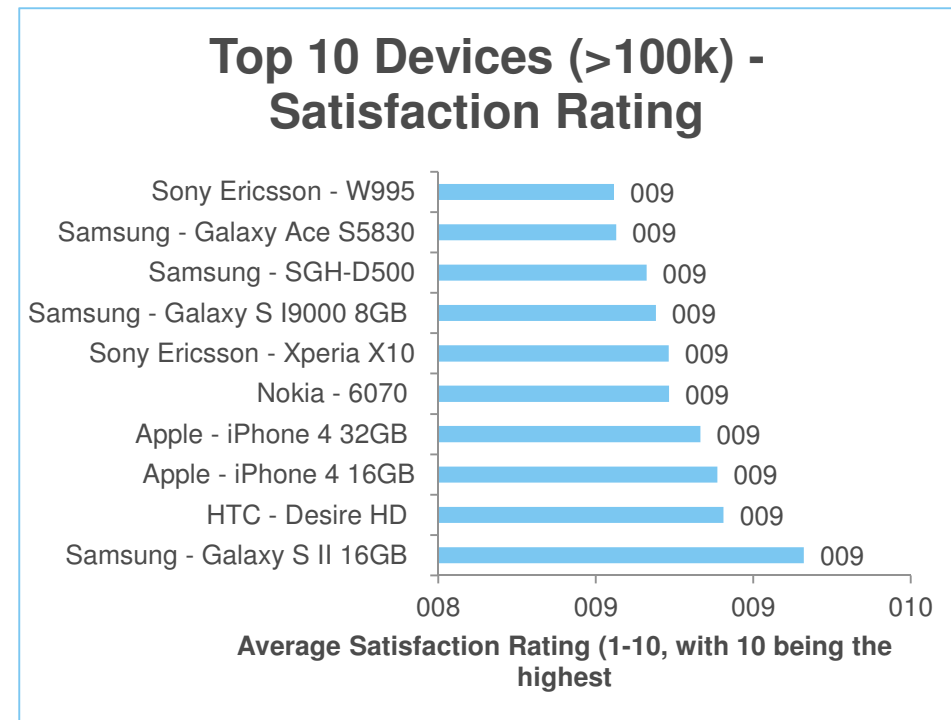
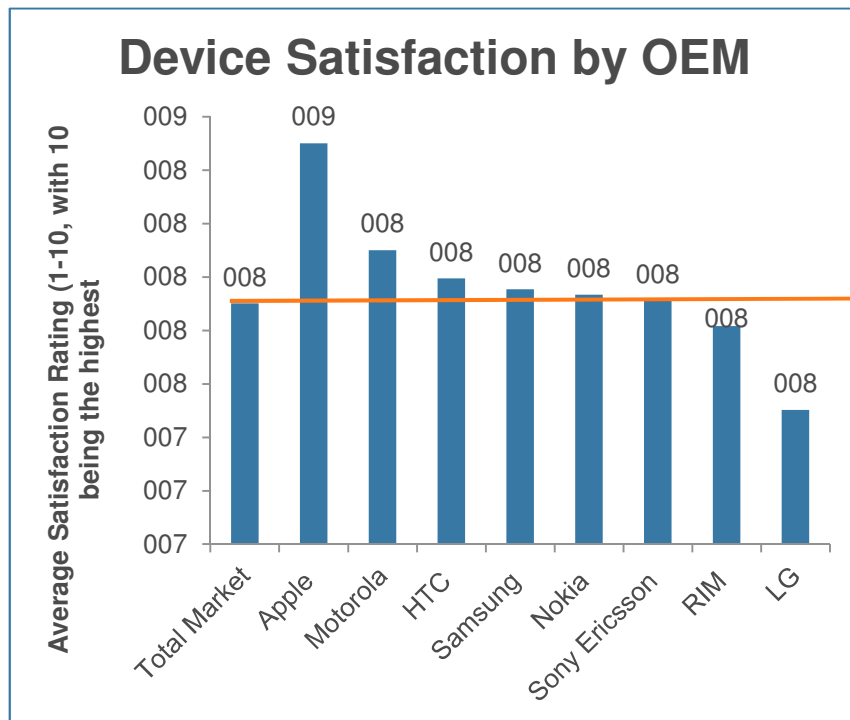
Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15, 169

Device Satisfaction – Apple Score the Highest Average Satisfaction

- When it comes to device satisfaction on OEM level, Apple's iPhones have the highest satisfaction.
- On handset model level, the Samsung Galaxy S II 16GB leads with the highest average satisfaction rating (9.16)
- Compared to the Total Market, Motorola also score above average.



Product: MobiLens

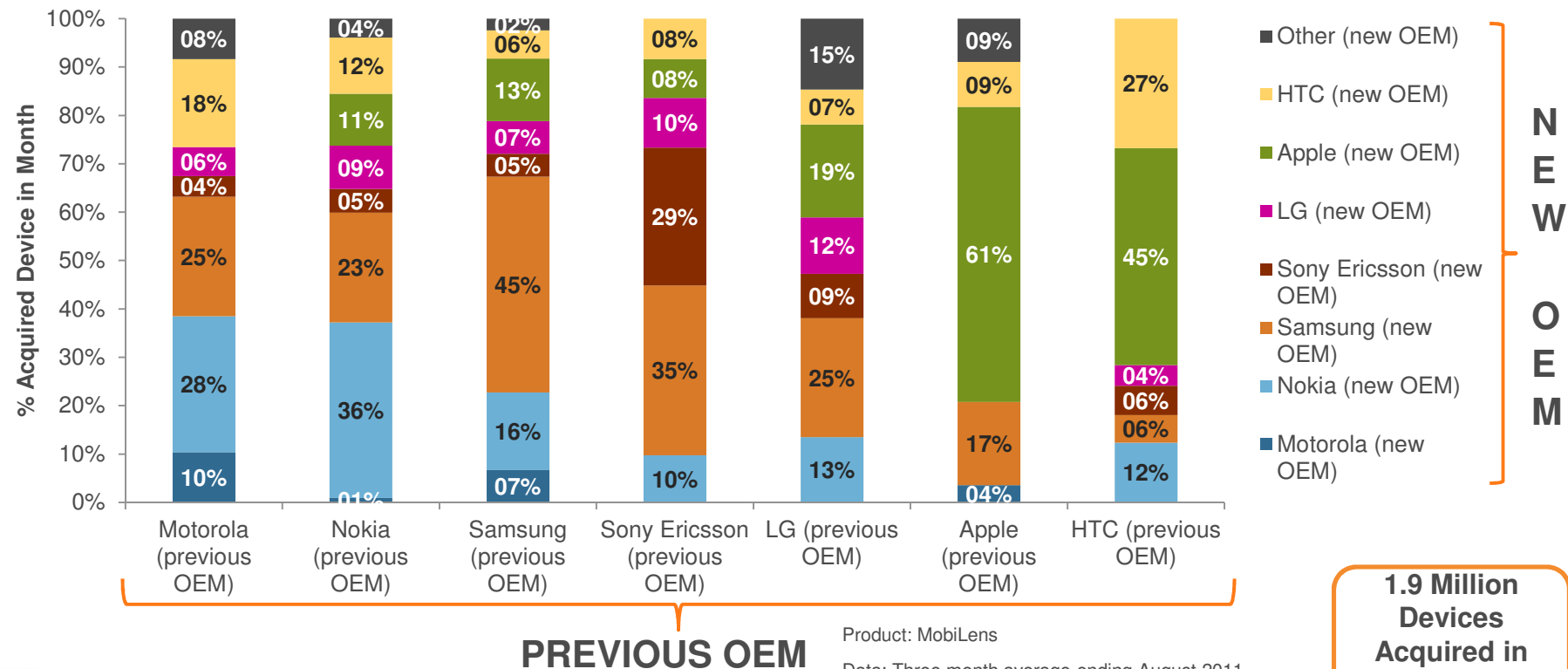
Data: Three month average ending August 2011

Country: DE, N=15, 169

Customer's Loyalty and Churn Rate: In August 2011, 61.0% of Former iPhone Owners Switched for Another Apple Phone

- With 61.0% Apple has the highest retention rate among the OEMs in comparison, followed by Samsung with 44.6%.
- 44.8% of former HTC phone owners acquired an iPhone, 12.3% changed to Nokia.
- Nokia's retention rate for August 2011 was 36.3% and 22.7% changed from a Nokia to a Samsung device.

OEM Churn Rates

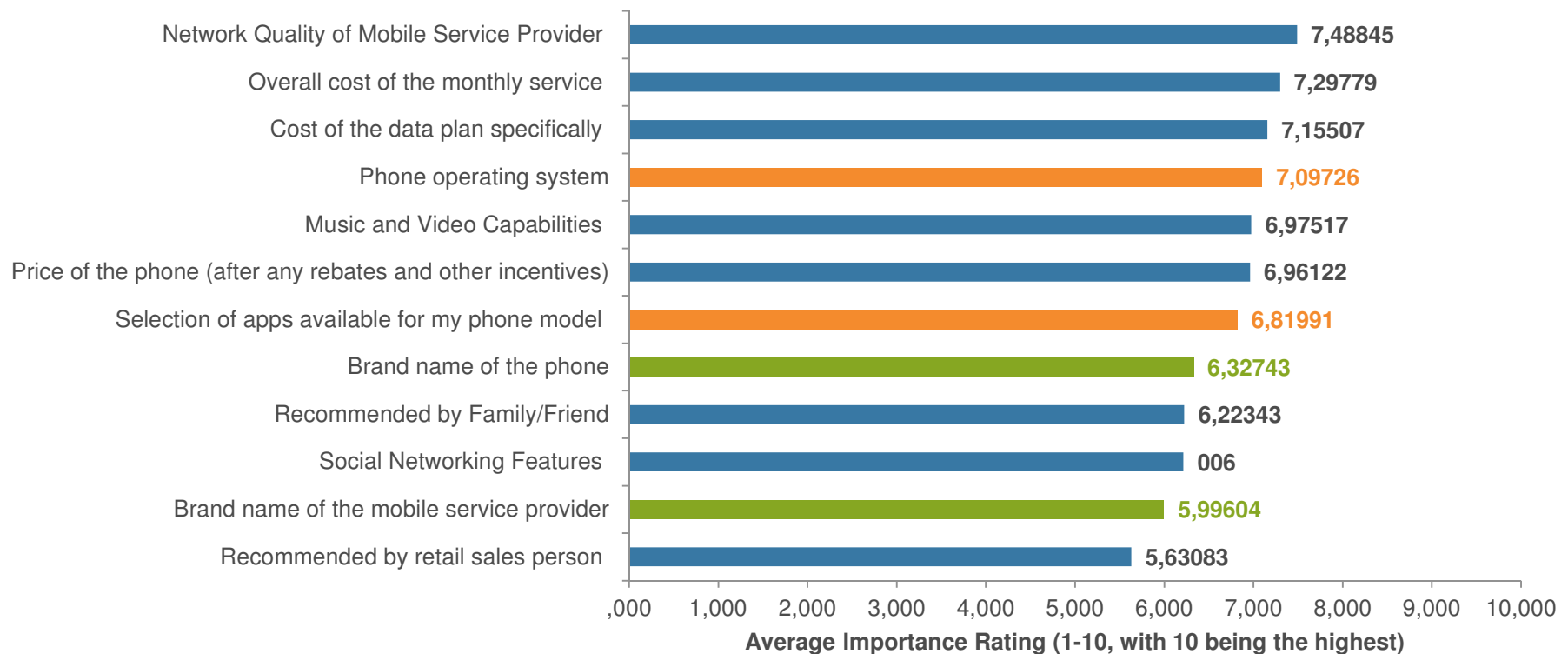


1.9 Million Devices Acquired in Month

Network Quality, Overall Service and Data Plan Costs Top Priorities For Customers Acquiring Smartphones

- Very interesting to see: Smartphone owners consider **phone operating system** and **selection of apps** more important than **OEM** or **operator**!

Handset Purchase Consideration - DE Smartphone Owners



Product: MobiLens

Data: Three month average ending August 2011

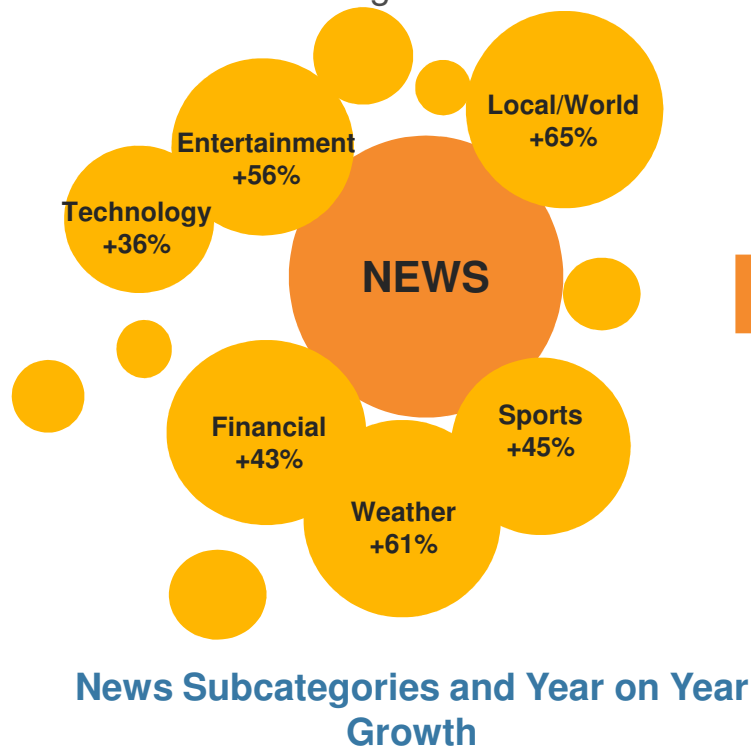
Country: DE, N=15, 169

Nutzertypen und Nutzungsverhalten



Erhöhter Konsum in allen sechs Nachrichten-Kategorien

- Das Handy ist längst ein stetiger Begleiter und bietet rund um die Uhr Zugang zu Nachrichtendiensten aus Bereichen wie Sport, Finanzen, Technik, Unterhaltung, Lokale und Welt-Nachrichten oder den Wetterbericht.
- Alle 6 Nachrichten-Kategorien befinden sich in den Top 20 beliebtesten Kategorien, die mit dem Handy genutzt werden. Die Nutzerschaft wächst sogar noch weiter.
- Der Handyzugriff auf Wettervorhersagen zum Beispiel wuchs 61% p.a., während Zugriff auf Lokale und Welt-Nachrichten sogar um 65% zu nahm.



Top 10 German News Brands	
Brand	Year on Year Growth
Google	+41%
Wetter.com	+78%
Wetter.de	+82%
Bild	+61%
Yahoo!	+30%
n-tv	+127%
Der Spiegel	+51%
T-Online	+27%
Tagesschau	+157%
Focus	+45%

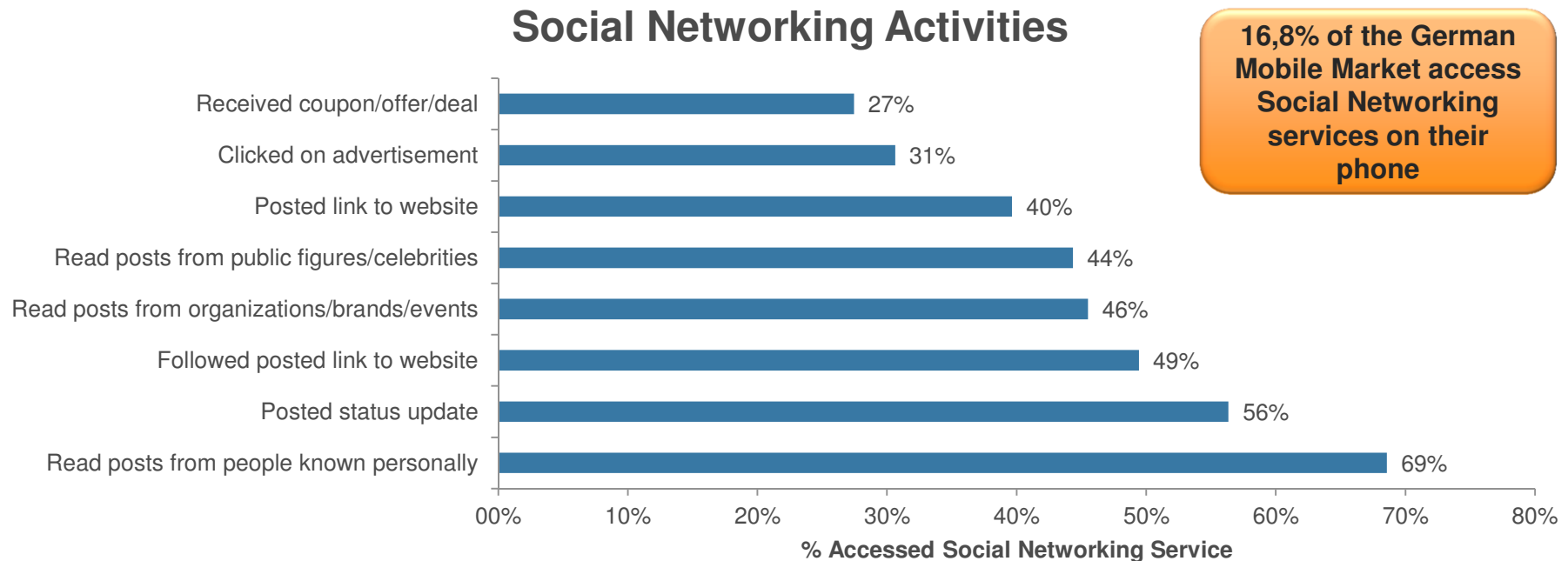
Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15, 69

Hinter verschlossenen Türen: Was passiert innerhalb Deutschlands Sozialen Netzwerken?

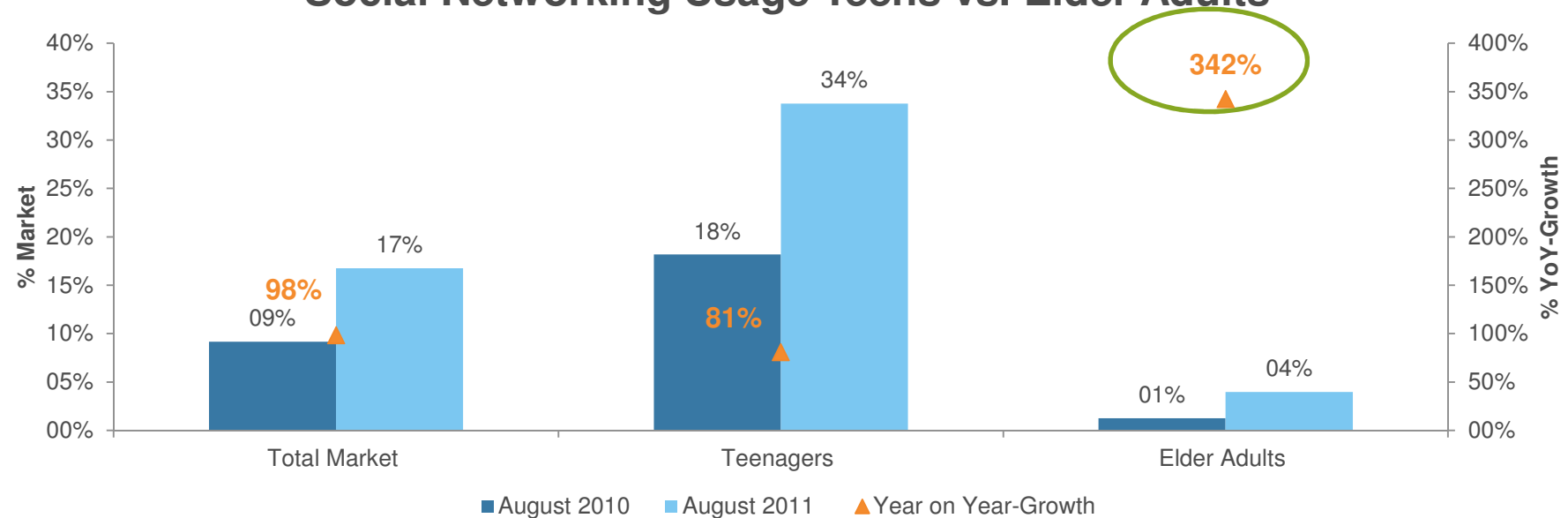
- 16,8% der deutschen Handybesitzer haben im August 2011 mit ihrem Handy auf Soziale Netzwerke zugegriffen
- 42% der Social Networking User machen jeden Tag von diesem Service Gebrauch – Haben Sie sich je gefragt, was genau der Nutzer macht, wenn er/sie sich ins Soziale Netzwerk einloggt?
- Bei weitem die beliebtesten Aktivitäten sind das Lesen von Status Updates von Familie oder Bekannten, sowie das Posten einer eigenen Statusmeldung



Mobile Social Networking Also Attracts Older Audience

- More than 30% of all Teenagers* now access Social Networking services with their mobile device, compared to around 4% of Elder Adults**.
- However, comparing annual growth rates, the elder adults segment is showing stronger growth of Social Networking service usage: 342.2% - high above average for Total Market.
- * Teenagers: mobile subscribers aged 13-19 years (4.9 million = 10.1% Total Market), **Elder Adults: mobile subscribers aged 55+ years (16.3 million = 33.5% Total Market)

Social Networking Usage Teens vs. Elder Adults



Product: MobiLens

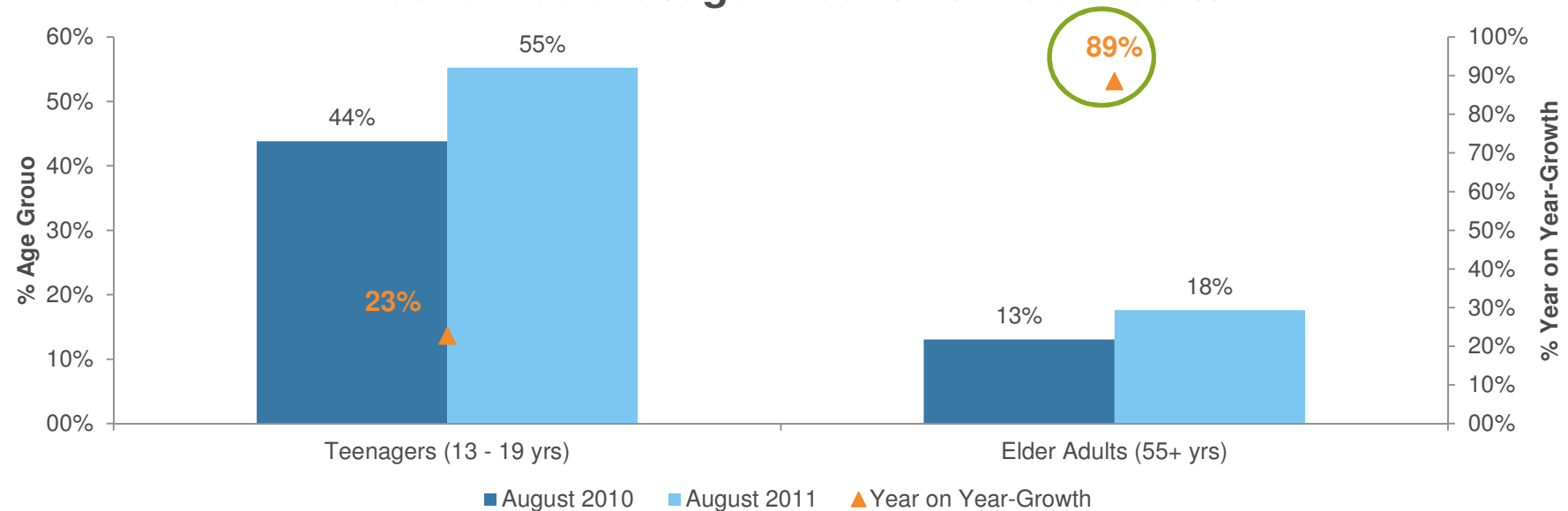
Data: Three month average ending August 2011

Country: DE, N=15, 169

Elder Adults Show Interest in Mobile Media

- Teenagers* use almost 3x the mobile media as elder adults**, but elders grew stronger in mobile media usage, 88.5% growth compared to teenagers, 22.7% growth year on year.
- The rapid year on year growth of mobile media by elder adults proves that teens are not the only age group who are getting heavier into connected media.
- *Teenagers: mobile subscribers aged 13-19 years (4.9 million = 10.1% Total Market), **Elder Adults: mobile subscribers aged 55+ years (16.3 million = 33.5% Total Market)

Mobile Media Usage - Teens vs Elder Adults



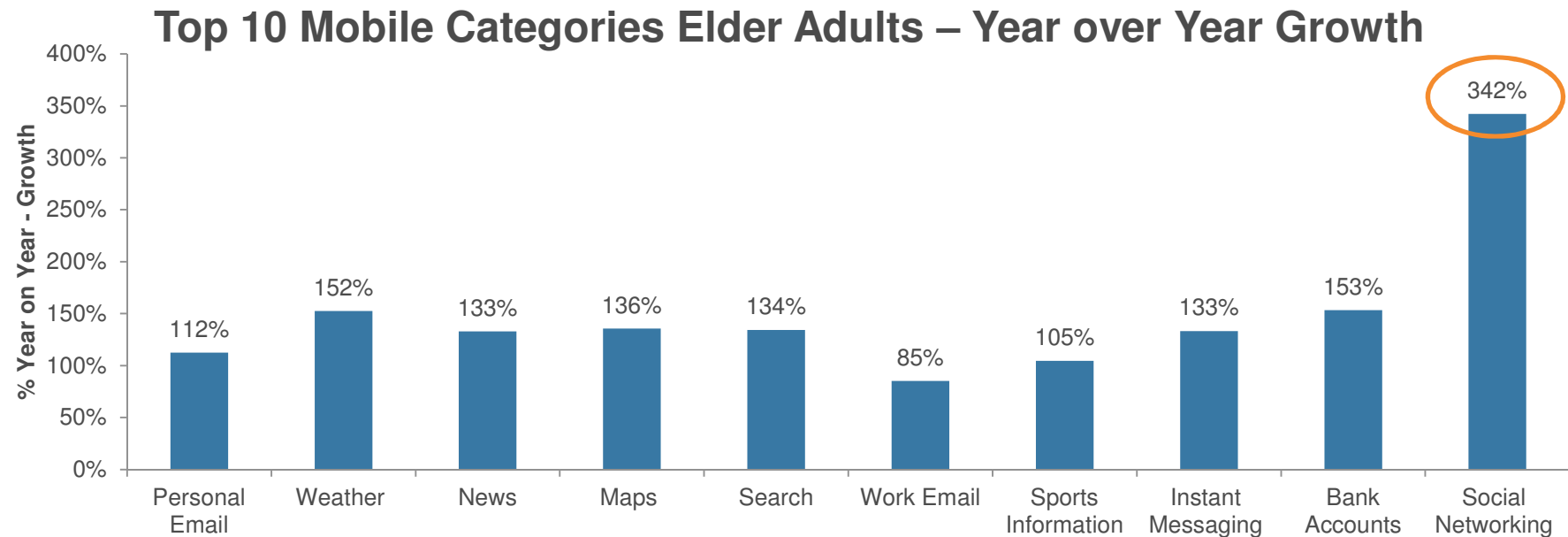
Mobile Media User = Used browser, application, native email, stream or download music and broadcast or on demand video (does not include SMS)

Product: MobiLens

Data: Three month average ending August 2011

Triple Digit Growth in All But One Major Categories Accessed by Elder Adults

- Overall usage of apps or the mobile browser has risen 95% year on year with the Elder Adults**. 17% of this segment now use apps or their mobile browser.
- The most popular categories all show strong growth: Personal Email is now used by 11% of Elder Adults and usage has increased 122% over the past year.
- Social Networking services are becoming increasingly popular with the 55+ age group.
- **Elder Adults: mobile subscribers aged 55+ years (16.3 million = 33.5% Total Market)



Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15, 169

Nutzung der Apps



The Average iTunes Apps User has Downloaded 70.38 Apps Ever

- The average paid apps downloader **has downloaded about 16 paid apps**
- 6 of the Top 10 Apps belong to the Social Networking Genre

Top 10 iTunes Apps - EuroZone

Rank	Title	Developer	Genre	Free / Paid	% Reach of all Apps Downloaders
1	Facebook	Facebook	Social Networking	-	36.3%
2	Skype	Skype Software S.a.r.l	Social Networking	-	35.4%
3	Google Earth	Google	Travel	-	35.4%
4	Paper Toss	Backflip Studios	Games	-	24.4%
5	Shazam	Shazam Entertainment Ltd.	Music	-	24.0%
6	Touch Hockey: FS5 (FREE)	FlipSide5, Inc.	Games	-	19.8%
7	Windows Live Messenger	Microsoft Corporation	Social Networking	-	19.7%
8	Bump	Bump Technologies LLC	Social Networking	-	18.2%
9	WhatsApp Messenger	WhatsApp Inc.	Social Networking	0.83	17.2%
10	Viber - Free Phone Calls	Viber Media, Inc.	Social Networking	-	16.1%

Product: iTunes App Tracker

Data: Downloads Ever – June 2011

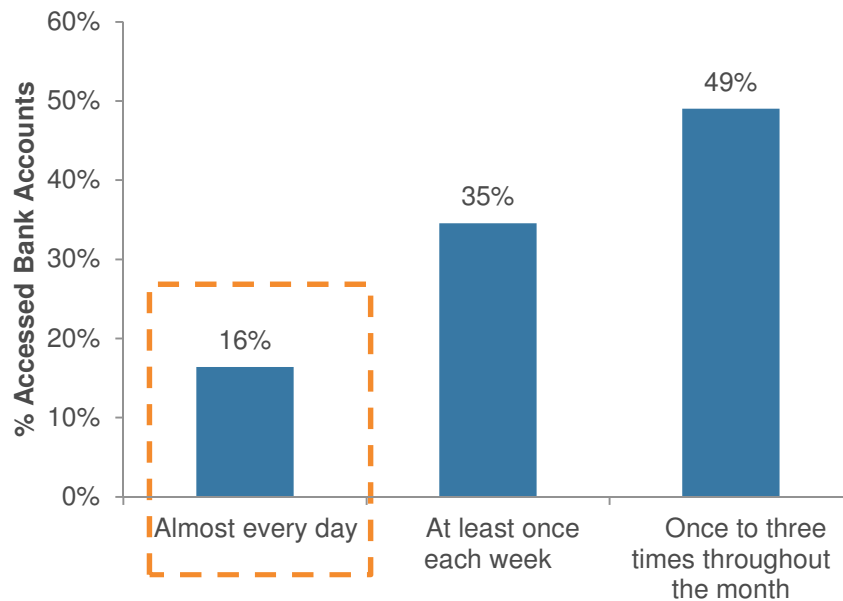
Country: EuroZone (FR, DE, IT, ES)

Mobile Banking Up 58% Since August 2010

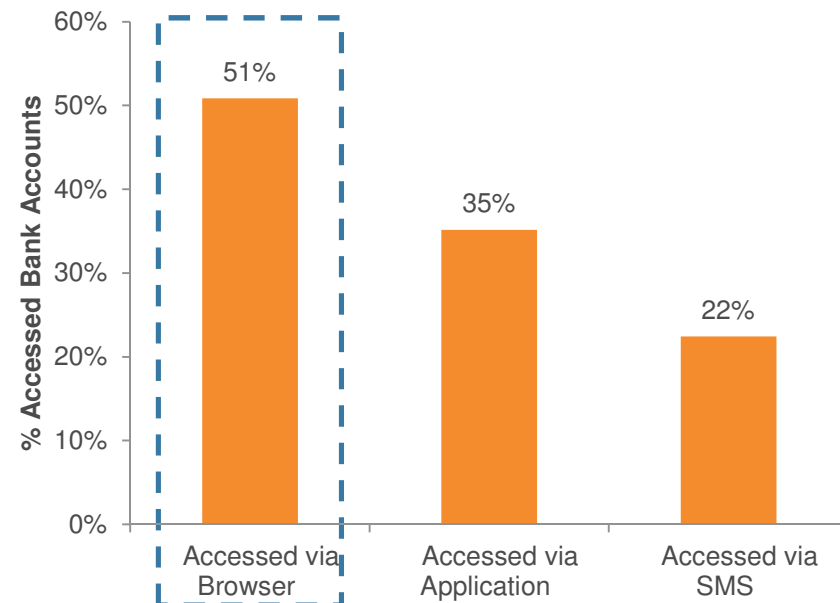
- 4.9 Million accessed bank accounts on mobile, that's 8% of the total German Mobile Audience.
- 16% access their accounts almost every day and 51% access via their mobile browser.



Frequency of Accessing Bank Accounts



Methods of Accessing Bank Accounts



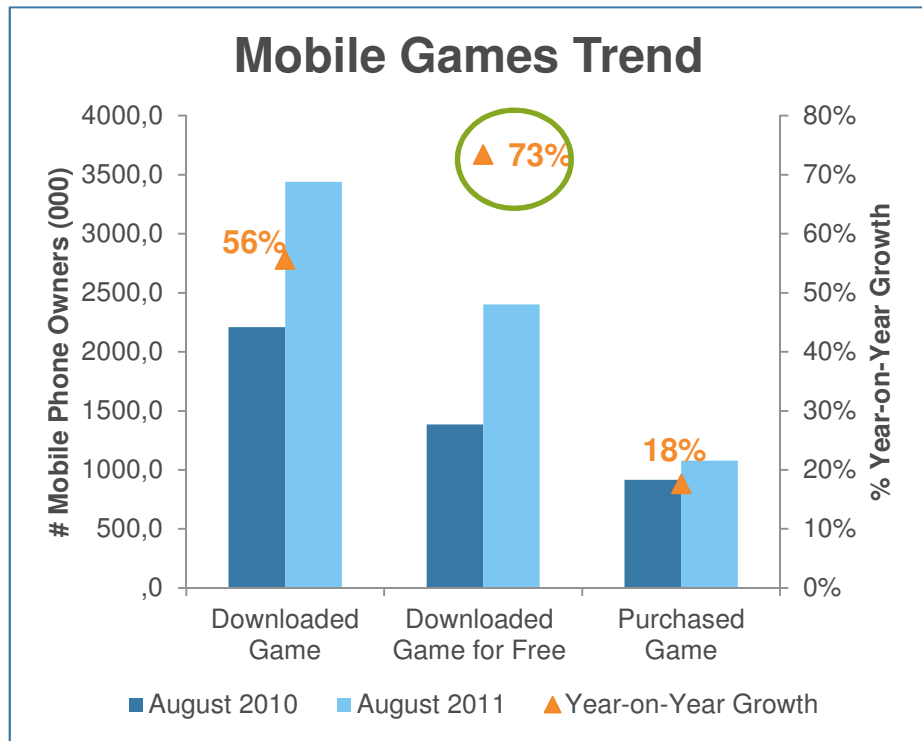
Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15, 169

Free Games Downloads Surpass Games Purchase

- The overall number of people downloading games has risen 56% over the past year.
- Free games downloads are up 73%, whereas the number of people purchasing games has grown by only 18%
- The majority of growth in the mobile games downloading is therefore coming from free downloads



Top 5 Stores for Free Game Downloads	% Reach Among Free Games Downloaders
Android Market	27%
Apple iTunes App Store	24%
Operator Store	10%
Ovi Store	6%
EA Mobile	5%

Product: MobiLens

Data: Three month average ending August 2011

Country: DE, N=15, 169

Zahlungsbereitschaft



15% of German Mobile Games Players Made In-Game Purchase

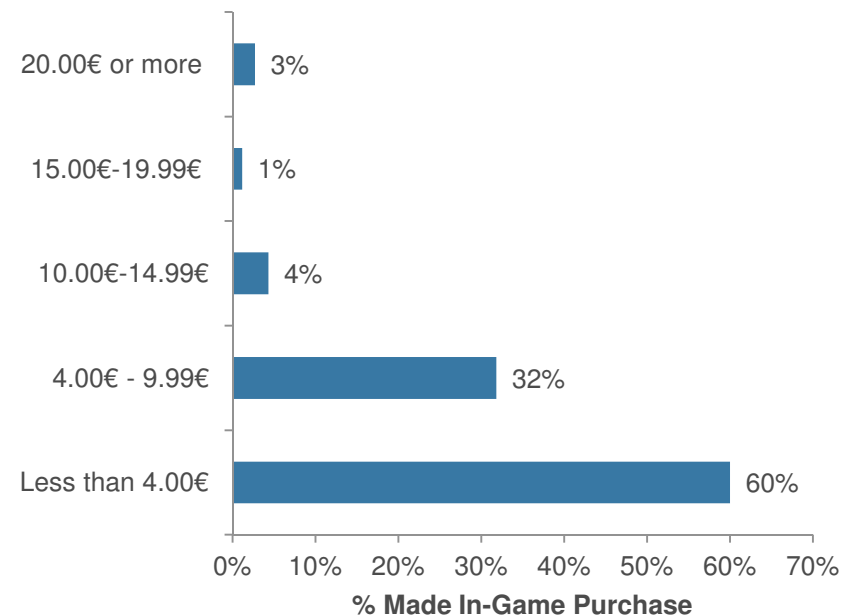
- August 2011 saw 14.5 million German mobile owners (25%) playing games on their phone.
- 15% of those have spent money to either purchase virtual goods, cash, points, or tokens, a gift for another player or to upgrade game or add levels.
- Around 40% spent more than 4.00€ , with 3% even spending 20.00€ or more

14.5 million played mobile games, that's 25% of the Total German Mobile Market



15% of those made in-game purchase

In-Game Spend



Product: MobiLens

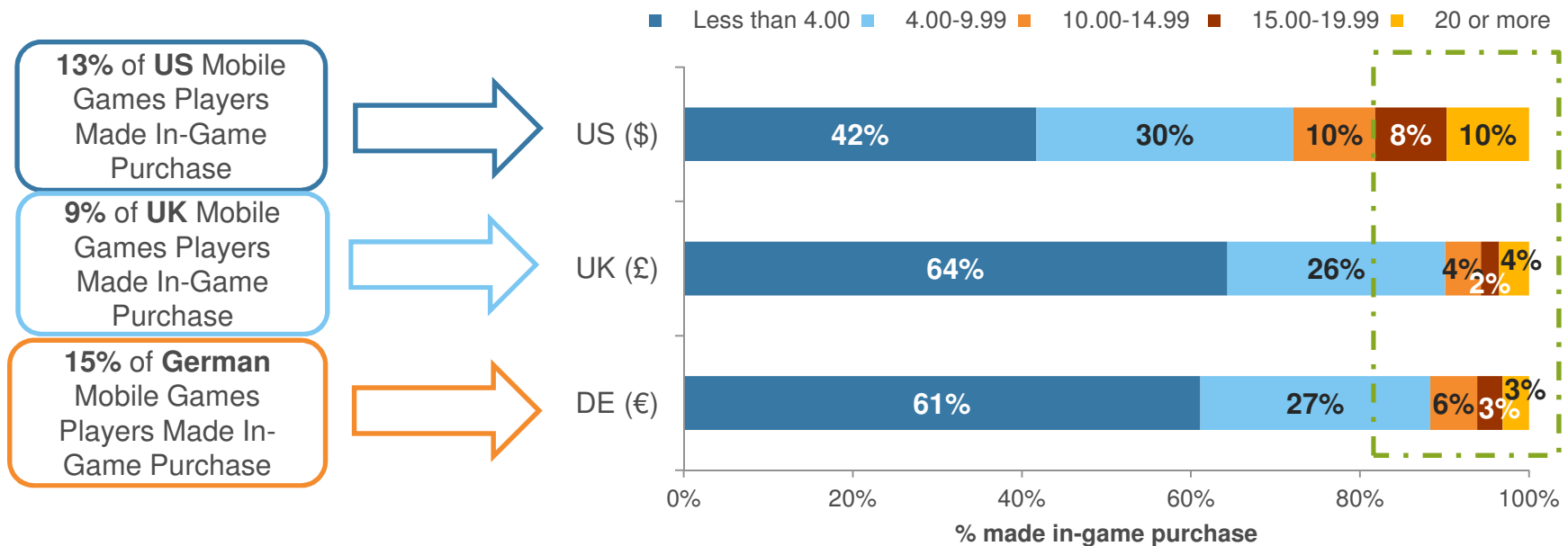
Data: Three month average ending August 2011

Country: DE, N=15, 169

15% of German Mobile Games Players Made In-Game Purchase

- 13% of US Mobile Games Players made an in-game purchase and 10% of those spent \$20.00 or more on virtual goods
- In Germany, 15% of mobile games players made an in-game purchase but only 3% spent more than €20.00 or more.
- The UK Mobile Games players have a spent smaller amounts, with 64% spending less than £4.00.

Amount of In-Game Spend
(in respective currency)



Product: MobiLens

Data: Three month average ending September 2011

Country: DE, N=15,144; UK, N=15,130; US, N=30,659

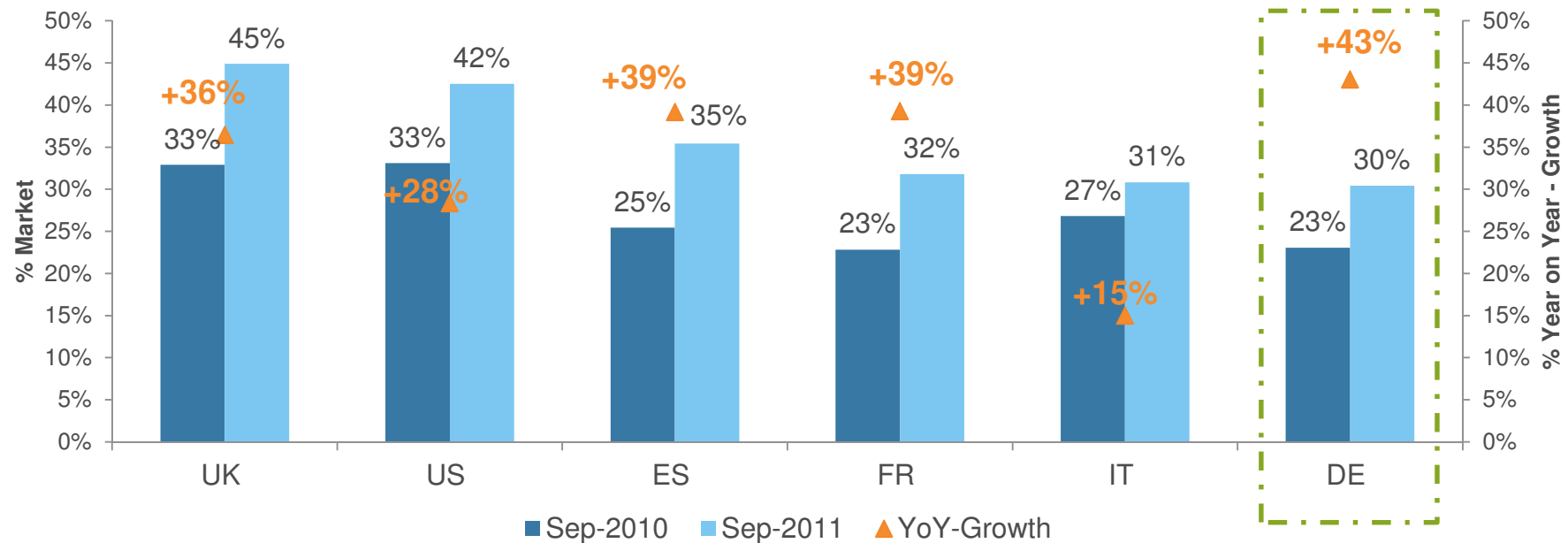
Internationaler Vergleich



Application Usage and Growth – US & EU5 Regions

- 30% of Germany's mobile phone owners now use applications.
- Compared to the US, France, Italy, Spain and the UK, Germany has a smaller penetration but when looking at the annual growth rates, Germany is leading with 43% year on year growth.

Application Usage and Trend



Product: MobiLens

Data: Three month average ending September 2011

Country: DE, N=15,144; UK, N=15,130; ES, N=12,225; IT, N=12,298; FR, N=12,206; US, N=30,659



Thank You.

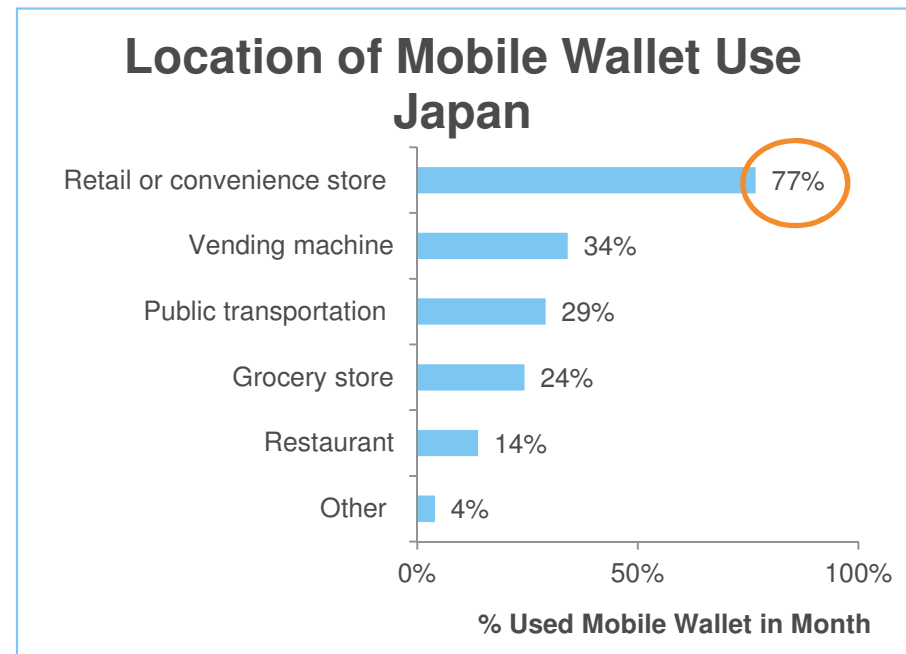
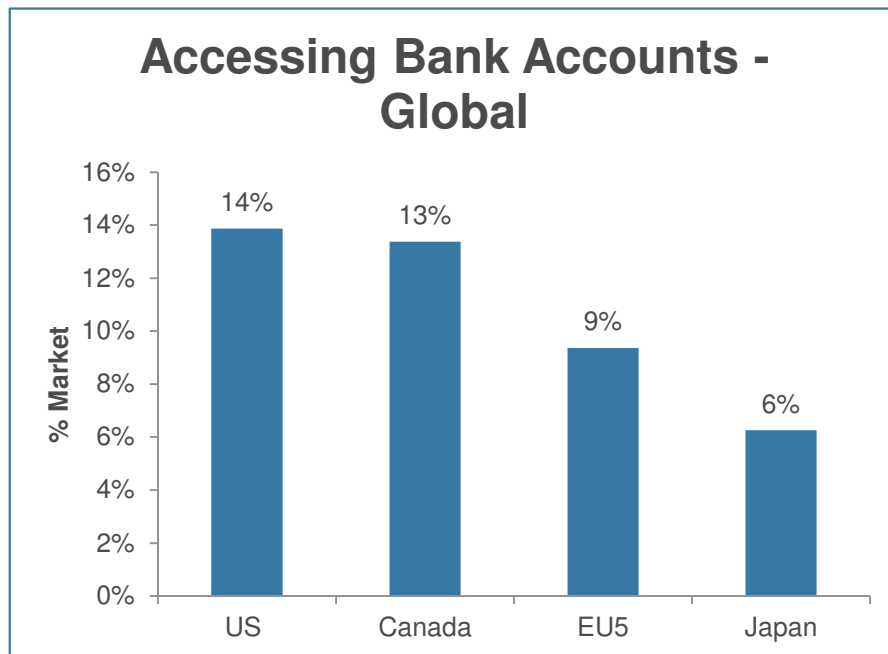


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Sven Koebler – skoebler@comscore.com

US and Canada Ahead of EU5 and Japan in Mobile Banking

- Mobile Banking in Japan has less than half the penetration in the US. Only 6% made use of the service in June 2011.
- The Japanese market does however profit from a service called 'Mobile Wallet', which allows consumers to use their mobile phones to pay for a variety of services – instead of using cash or credit/debit cards.
- 8.5 million made a purchase using Mobile Wallet in June 2011, 77% of those in a retail or convenience store.



Product: MobiLens

Data: Three month average ending June 2011*

(*with the exception of Japan , Canada - 1 month data June 2011)

Country: US, N= 30,966, EU5, N=66,737, JP, N= 5,000 , CA, N= 5,500

Tablet Advisor Coming 2012

How are consumers using their tablets? Who owns and what tablets do they own? How are consumers using these devices in conjunctions with their other media devices. All questions that will be answered in our Tablet Advisor.

- **Data From**
 - Survey 4000 – 5000 Tablet users
 - Device Essentials Data
- **4 Quarterly Deliverable**
- **Available 2012**



iPad 2

