

## Consumer Mobile Behaviour in Europe, USA and Japan

According to **ComScore's excellent 2010 Mobile Year in Review** (February 2010) Japanese consumers are still much more advanced in their mobile usage, with 55.4 percent accessing the mobile Web and 57.1 percent using email, but US and European consumers are catching on fast.

Even in developed nations (where smartphone penetration is higher), more people use mobile Web than mobile apps. Very few use either mobile apps or mobile Web exclusively.

Only 6 percent of app users in the US and 7 percent in Europe don't use their browser.

While 8 percent of browser users in the US and Europe don't use apps.

This makes a mockery of the people who claimed the download app would kill the mobile Web.

Despite all the media hype, the massive advertising campaigns and unfathomable amounts of money that has been invested in developing and promoting apps for proprietary handsets, mobile consumers still use the mobile Web more.

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<b>Mobile behavior in Japan, United States and EU5 (UK, Germany, France, Spain and Italy) – October, November, December 2010</b> Percent of total mobile audience (Age 13+)			
	<b>Japan</b>	<b>United States</b>	<b>Europe</b>
<b>Used connected media (browser, app or download)</b>	46.7%	41.1%	76.8%
<b>Used browser</b>	36.4%	28.8%	55.4%
<b>Used application</b>	34.4%	28.0%	53.3%
<b>Used messaging</b>			
<b>Sent text message</b>	68.0%	82.7%	41.6%
<b>Instant messaging</b>	17.2%	14.2%	3.6%
<b>Email</b>	30.5%	22.2%	57.1%
<b>Accessed entertainment/social media</b>			
<b>Took photos</b>	52.4%	57.5%	62.9%
<b>Social networking or blog</b>	24.7%	18.0%	19.3%
<b>Played games</b>	23.2%	25.3%	16.3%
<b>Recorded video</b>	20.2%	26.1%	15.8%
<b>Listened to music</b>	15.7%	25.0%	12.9%

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<b>Watched TV and/or video</b>	5.6%	5.7%	22.8%
<b>Accessed financial services</b>			
<b>Bank accounts</b>	11.4%	8.0%	7.0%
<b>Financial news or stock quotes</b>	10.2%	8.0%	16.5%
<b>Accessed news, sports, weather, search, retail, travel, reference</b>			
<b>News and information</b>	39.5%	32.2%	57.6%
<b>Weather reports</b>	25.2%	16.4%	34.7%
<b>Search</b>	21.4%	14.9%	31.5%
<b>Maps</b>	17.8%	13.0%	17.1%
<b>Sports news</b>	15.8%	12.0%	18.2%
<b>Restaurant info</b>	10.0%	6.5%	9.7%
<b>Traffic reports</b>	8.4%	7.4%	14.0%
<b>Retail site</b>	6.5%	5.2%	8.5%
<b>Classifieds</b>	7.3%	4.8%	3.6%
<b>Travel service</b>	4.4%	4.6%	2.9%

### What do mobile users do online?

**IDC** believes the most popular activities today are: mobile search, reading news and sports information, downloading music and videos, and sending/receiving email and instant messages. Over the next four years, IDC predicts the fastest growing activities will be purchasing, social networking and blogging. Accessing online business applications and corporate email systems will also grow rapidly.

**CINIC** reports (July 2010) that among China's mobile Web users – the world's biggest mobile Web community – the most popular activities are: instant messaging (62 percent); search (48 percent); web music (45 percent); web literature (43 percent); social networking 36 percent; games (21 percent); video (20 percent); email (16 percent); and m-commerce (6 percent).

### The top 10 ways consumers will use mobile in 2012, as predicted by Gartner

Order was determined by impact on consumers and industry players, considering revenue, loyalty, business model, consumer value and estimated market penetration):

- **No. 1: Money transfer** – most services offering person-to-person transfers, using Short Message Service (SMS), signed up several million users within their first year.
- **No. 2: Location-based services** – Gartner predicts that the LBS user base will grow globally from 96 million in 2009 to more than 526 million in 2012.
- **No. 3: Mobile search** – the user experience of mobile search needs to improve to drive customer loyalty and drive sales and marketing opportunities.
- **No. 4: Mobile browsing** – 60 percent of handsets shipped in 2009 can browse the mobile Web, rising to approximately 80 percent in 2013. Therefore, the mobile Web will be a key part of most corporate B2C mobile strategies.
- **No. 5: Mobile health monitoring** – i.e. using IT and mobile telecommunications to monitor patients remotely. So far it has been limited to pilot projects.

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- **No. 6: Mobile payment** – paying for goods and services over the mobile Web
  - **No. 7: Near-field-communication services** – NFC allows contactless data transfer between devices and terminals typically to pay for transport or to cash in a mobile coupon.
  - **No. 8: Mobile advertising** – Gartner expects spending on mobile advertising to reach US\$7.5 billion in 2012 from US\$530.2 million in 2008.
  - **No. 9: Mobile instant messaging** – Gartner thinks users really desire Mobile IM, especially in developing markets. This presents an opportunity for mobile advertising and social networking.
  - **No. 10: Mobile music** – apart from ring tones and ring-back tones, which have turned into a multibillion-dollar service, mobile music has so far has been disappointing.
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“Even though applications received much more attention by the media throughout 2010 , application usage is still second to browser usage when it comes to the mobile web. Across all regions mobile browsing and application usage is growing in the range of 7 to 9 percentage points. Further analysis of browser use and application access shows that the two activities are not mutually exclusive. In fact, most users that utilize one method use the other. In the U.S only 6 percent of app users don’t utilize their browser, while 8 percent of browser users don’t utilize apps. In Europe just 7 percent of app users don’t use browser, while 8 percent of browser users don’t utilize apps