GLOBAL MOBILE MEDIA CONSUMPTION
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Foreword

Of all the marketing opportunities new forms of digital media are creating, the mobile platform is facilitating some of the most scalable methods for advertisers to target and reach their audiences. The use of mobile devices represents an unprecedented and unparalleled shift in how consumers use media. The mobile channel's growth as a marketing and advertising vehicle has been so fast that marketers are continuously finding new ways to leverage its power. This is an opportune time for marketers to try and understand the mobile media behaviors among global consumers in order to craft a winning mobile strategy.

InMobi’s second Global Mobile Media Consumption survey provides unique insights into the mobile consumer behavior of 15,000 respondents across 14 markets.

The Global Mobile Media Consumption report provides a view of some of the key trends that the survey results have revealed, both by looking at the individual country picture and at the consolidated global level.

We hope you find these insights from the InMobi Global Mobile Media Consumption survey useful and we welcome further conversation around the data and its implications.

InMobi Insights Team
Executive Summary

The pace of innovation around the mobile landscape is stimulating. Mobile has become instilled into the lives of consumers, and it is already having an impact on commerce and payments, sales in physical retail stores, and e-commerce. Mobile is emerging as the preferred channel of choice for large groups of consumers globally. As mobile is evolving into one of the most influential technologies for consumers, marketers are taking necessary steps to understand customer behavior within specific product categories. As the device wars widen with the launch of new smartphones and mobile operating systems, the entire mobile ecosystem, including mobile apps, mobile social media, mobile data and mobile advertising, are exploding.

According to data from the International Telecommunication Union (ITU), total mobile subscriptions topped 6 billion globally with more than 1 billion mobile broadband subscriptions worldwide. Smartphone use as a primary Internet device for shopping and social media has become mainstream and the rollout of 4G around the world will further drive smartphone engagement in the multichannel shopping experience. Mobile is becoming an important channel for advertisers as it enables them to be with the customer through the purchase process, from initial awareness through consideration to final purchase, thereby allowing them to engage audiences at each step of the process.
It is time for marketers to deliberate on investments to develop and leverage appropriate mobile capabilities to support the needs of the customer through the purchase funnel. Marketers must make a bigger investment into this space and look at new technologies to help develop richer relationships and trust with consumers.

Developing an understanding of the mobile behaviors of your target audience is key to building and refining a strong mobile strategy. InMobi and research partners On Device Research and Decision Fuel have tracked media consumption behaviors across 14 key global markets as part of our mobile media consumption study. The study reveals that consumers are actively initiating brand engagements during the course of their mobile sessions, influencing everything from social connections to buying intentions. The findings demonstrate how mobile advertising can play a key role in assisting advertisers that is increasingly challenging in a fragmented media environment.
About Research

Research Objectives:
Explore the behaviors of mobile data users globally to understand:
- How they consume different media?
- How they engage and interact with mobile?
- How mobile and traditional media influence their shopping behavior?
- How do they respond to mobile advertising?
- Do they engage in M-Commerce?

Research Methodology:
- Recruited via InMobi global mobile ad network between August and November 2012.
- Used Decision Fuel & On Device Research mobile web platforms to collect a representative sample, including a full range of smartphones and feature phones.
- Weighted according to available mobile web demographics.

Geographic Coverage:
- To better understand changing media consumption usage and behaviors across the world, InMobi conducted a research study among over 15,000 mobile web users in 14 markets, including: China, India, Japan, Korea. Singapore, Australia, New Zealand, UK, US, France, Germany, Kenya, Nigeria, South Africa
Key Findings

- Mobile devices rule media consumption: Globally mobile ranks first in media consumption, comprising 1.8 hours of the 7 hours spent consuming media - this is more than a quarter of time spent with media, outpacing TV (1.5 hours), PCs (1.6 hours) and any other channel.

- Globally consumers are increasingly connected and our survey shows they are increasingly multitasking when it comes to multi-media. 62% of mobile web users engage in mobile media activities while watching TV.

- Across emerging and developed markets, mobile web is no longer just about early adopters and its moving into the mainstream.

- 27% of respondents stated they have actively used 6-10 apps in the last 30 days.

- Growth in mobile use in the coming year will be primarily driven by social media, app download and search activities.

- 59% of mobile users globally are as comfortable with mobile advertising as they are with TV or online advertising.

- Sources where users discover mobile ads: 54% via apps, 40% on a search engine, 27% on a retailer website, 23% on a video website and 17% others.

- Only 15% of mobile web users frequently click on mobile ads unintentionally.

- Mobile ads are almost on par with TV and online in terms of impact on purchase decisions globally.

- 80% of consumers plan to conduct mobile commerce in the next 12 months.
Mobile is Getting Bigger

To see how big of an opportunity the mobile market is, we must take a deeper look at the actual numbers:

- Machines are all set to outnumber humans on planet earth. By the end of 2013, the number of mobile-connected devices will exceed the number of people on earth, and by 2017 there will be nearly 1.4 mobile devices as against every human.
- 91% of all smartphone users have their phone within arm’s reach 24/7 - (Morgan Stanley, 2012)
- Mobile marketing will account for 15.2% of global online ad spend by 2016. (Berg Insight, 2012)
- According to Gartner, Global mobile ad expenditure is forecast to be US$11.4b in 2013, up from $9.8b in 2012, rising to $24.6b in 2016. Asia will continue to be the largest mobile ad market, initially driven by Japan and South Korea, and later by China and India. However the North American market is catching up fast.
- eMarketer estimates that 1.7 billion people around the world will access the internet via a mobile device in 2013. By 2016, there will be a staggering 2.5 billion mobile internet users worldwide.
- Global technology giant Ciscos Global Mobile Data Traffic Forecast says that global mobile data traffic grew 70% in 2012. Last year’s mobile data traffic was nearly 12 times the size of the entire global internet in 2000.
Introduction

In today’s technologically advanced world, where consumers are demanding access to services and content on the move, mobile is rapidly evolving into one of the most influential technology for the marketer and mobile media is moving business away from traditional media and is becoming more integrated and central part of consumer’s media consumption.

The world of communication now shifting from TV to desktops and now to mobile and with the mobile population about to breach the 1 Billion mark, marketers are now realigning their advertisement strategies to incorporate mobile based advertising. Internet has been the catalyst in this revolution by keeping people connected. As the consumer behavior is undergoing a change in terms of their thinking and behavior, marketers are also changing the way they engage their consumers to drive engagement and loyalty. They are looking to understand, leverage and measure mobile advertising and also look to integrate online and offline customer acquisition and relationship building.

As more people use their smartphones to research products, the mobile is the channel to drive advertisements that are not only relevant, but also precise and targeted. With the potential intimacy, personalization and contextual content offered by mobile, a significant opportunity exists not only in advertising but also lower funnel marketing or engaging with existing customers.

It is important for the marketers to understand the behavior of consumers in today’s world where people spend majority of their time on mobile. Mobile holds true potential of being the ultimate channel for advertisers and it is imperative for marketers to have a strategy that is mobile ready.

Here are few insights gathered from the global mobile media consumption study by INMOBI and their research partners.
General Media Consumption

Mobile is becoming a hot favorite in consumers’ media world

Mobile devices rule media consumption:
Globally mobile ranks first in media consumption with 1.8 hours of the 7 hours spent consuming media - this is more than a quarter of time spent on mobile, outpacing TV (1.5 hours), PCs (1.6 hours) and any other channel. Clearly, mobile asserts its dominance over Internet & traditional media.

Globally mobile is the preferred media for communication, entertainment and search among consumers.

Q1: In a typical day, approximately how much time do you spend on media?

N=12,723

*Note: Data excludes UK & US as options are not asked in these markets
Across Markets

Mobile takes up a significant share of media time across markets and has surpassed time spent online in many markets.

Q1: In a typical day, approximately how much time do you spend on media?

<table>
<thead>
<tr>
<th>Market</th>
<th>Using Mobile</th>
<th>Listening to Radio</th>
<th>Online via desktop/laptop</th>
<th>Watching TV</th>
<th>Using a tablet device</th>
<th>Reading Newspapers/Magazines</th>
</tr>
</thead>
<tbody>
<tr>
<td>GLOBAL</td>
<td>26%</td>
<td></td>
<td>22%</td>
<td>12%</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>SOUTH AFRICA</td>
<td>27%</td>
<td></td>
<td>16%</td>
<td>17%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>KENYA</td>
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<td></td>
<td>12%</td>
<td>22%</td>
<td>4%</td>
<td>9%</td>
</tr>
<tr>
<td>SINGAPORE</td>
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<td>25%</td>
<td>19%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>NEW ZEALAND</td>
<td>21%</td>
<td></td>
<td>22%</td>
<td>25%</td>
<td>18%</td>
<td>7%</td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td>22%</td>
<td></td>
<td>21%</td>
<td>18%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>FRANCE</td>
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<td>24%</td>
<td>15%</td>
<td>8%</td>
<td>7%</td>
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<tr>
<td>NIGERIA</td>
<td>28%</td>
<td></td>
<td>13%</td>
<td>17%</td>
<td>6%</td>
<td>11%</td>
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<tr>
<td>CHINA</td>
<td>27%</td>
<td></td>
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<td>5%</td>
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</tr>
<tr>
<td>GERMANY</td>
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<td>5%</td>
<td>8%</td>
</tr>
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<td>INDIA</td>
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<td>23%</td>
<td>22%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>KOREA</td>
<td>24%</td>
<td></td>
<td>24%</td>
<td>26%</td>
<td>7%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Sample size: Global n=12,723; Australia n=1,008; China n=2,001; France n=626; Germany n=411; India n=2,004; Japan n=1,010; Korea n=1,381; Kenya n=1,027; New Zealand n=763; Nigeria n=1,053; Singapore n=757; South Africa n=682

Note: Data excludes UK & US as options are not asked in these markets
Marketing Implications

So far, mobile ad spend has not kept up with the growth in actual consumer engagement in this channel, and represents only 1% of the global ad spending. Mobile media is becoming an integrated and central part of consumer media consumption with customers demanding access to content and services anywhere and at any time. According to Forrester, smartphones and tablets will put power in the pockets of a billion global consumers by 2016. Mobile has opened a variety of different techniques for marketing and has enormous potential to connect advertising in the physical world. Here are a few reasons as to why mobile marketing is important today:

- Mobile search has been consistently on the rise with consumers searching for things daily and often multiple times a day
- Mobile is highly contextual which includes consumer’s preferences; situation and position meaning the mobile device will know more about consumers than any other device
- Mobile is essentially changing the consumer’s lifestyle on how they interact with world around them
- Mobile marketing is very personal and acts as a bridge that makes advertising more accessible and actionable to each and every consumer
- More and more people are accessing internet on mobile phones and tablets than desktops and laptops
- Mobile marketing is immediate unlike other forms of marketing or advertising with promotions reaching the target audience without any delay.
- Mobile offers a diverse medium in mobile search, apps, mobile websites and SMS for advertisers to interact with consumers
Multitasking Between Media Channels is the New Norm

- Globally consumers are increasingly connected and our recent survey shows they are increasingly multitasking when it comes to multimedia. 62% of mobile web users engage in mobile activities while watching TV.

- What are audiences doing while watching TV? 48% of mobile web users are mainly engaged in social networking, 46% messaging, and 30% playing games. Interestingly, advertisers should take note that while viewers may be splitting attention between two (or three) screens, 18% of mobile web users searched for product information while the television was on.

Multitasking has changed the way we use mobile which has made possible for us to do different things at the same time.

Marketing Implications

Mobile devices are an integral part of consumer habits and are able to receive and process multiple streams of messages at the same time. Attention around a body of content across multiple channels creates opportunities for advertisers to leverage synergies between these channels. Hence it is imperative for marketers to correlate multiple channels such as TV consumption and consumer Internet behavior; using portable devices to create a dialogue and influence purchasing behavior can have a multiplier effect.
Across Markets

At least 1 out of 2 mobile web users would engage in dual screen activity (between TV and mobile)

Q2: For mobile activities like surfing the web (excludes calls and SMS), do you typically use your mobile when? While watching TV

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>GLOBAL</td>
<td>62%</td>
</tr>
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<td>SOUTH AFRICA</td>
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<tr>
<td>NEW ZEALAND</td>
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<tr>
<td>FRANCE</td>
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<tr>
<td>GERMANY</td>
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<tr>
<td>UK</td>
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<td>US</td>
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<tr>
<td>KENYA</td>
<td>66%</td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td>64%</td>
</tr>
<tr>
<td>JAPAN</td>
<td>63%</td>
</tr>
<tr>
<td>INDIA</td>
<td>58%</td>
</tr>
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<td>SINGAPORE</td>
<td>56%</td>
</tr>
<tr>
<td>NIGERIA</td>
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</tr>
<tr>
<td>CHINA</td>
<td>54%</td>
</tr>
<tr>
<td>KOREA</td>
<td>50%</td>
</tr>
</tbody>
</table>

Sample size: Global n=14,777; Australia n=1,008; China n=2,001; France n=626; Germany n=411; India n=2,004; Japan n=1,010; Korea n=1,381; Kenya n=1,027; New Zealand n=763; Nigeria n=1,053; Singapore n=757; South Africa n=682; UK n=999; US n=1,055
Mobile App Usage Soars

- Mobile app use is accelerating; 27% of respondents stated they have actively used 6-10 apps in the last 30 days.

Marketing Implications

Apps are now an integral part of the mobile marketing mix as they utilize all the functionality of a smartphone, provide useful and engaging brand experiences and can connect brands and products directly to consumers.

Q3: Of all the apps you currently you have, how many have you actively used in the last 30 days?

N=9,372

*Note: Data excludes UK & US as options are not asked in these markets
French mobile web users top the list in terms of active apps usage.

Across Markets

Q3: Of all the apps you currently have, how many have you actively used in the last 30 days?

Sample size: Global n=9,372; Australia n=734; China n=1,530; France n=411; Germany n=217; India n=1,535; Japan n=551; Korea n=924; Kenya n=927; New Zealand n=622; Nigeria n=766; Singapore n=596; South Africa n=557

*Note: Data excludes UK & US as options are not asked in these markets
Mobile Devices Becoming Medium of Choice to Access the Internet

Across emerging and developed markets, mobile web is no longer just about early adopters and its moving mainstream. Our study clearly demonstrates that mobile Internet usage is now a mass market phenomenon. 50% of average global mobile web users now use mobile as either their primary or exclusive means of going online.

Marketing Implications
In today’s world of better network coverage, faster connections and affordable smartphones and tablets, mobile devices are rapidly becoming the primary medium to access the Internet. This has opened up tremendous opportunities for players in the communications and media industries.

Q4: How do you typically go online to surf the web?

- Mostly via a desktop/laptop: 15%
- Mostly via mobile phone: 32%
- Evenly split between mobile and desktop/laptop: 35%
- Only via mobile phone: 18%

N=14,632
Across Markets

Mobile is becoming a major component of Internet behavior, especially in developing markets.

Q4: How do you typically go online to surf the web?

Sample size: Global n=14,632; Australia n=1,008; China n=2,001; France n=626; Germany n=411; India n=2,004; Japan n=1,010; Korea n=1,381; Kenya n=1,027; New Zealand n=763; Nigeria n=1,053; Singapore n=757; South Africa n=682; UK n=925; US n=984
Mobile Media Behaviors: Who?

Our study clearly demonstrates that Mobile Web is no longer just about early adopters.

Q5: How do you feel about the following statement: “I am usually the first among my friends to acquire new technology”?

New wave of mobile users includes a proportion of ‘regular’ consumers (not only early adopters)

Sample size: Global n=14,468; Australia n=1,008; China n=2,001; France n=611; Germany n=402; India n=1,912; Japan n=1,005; Korea n=1,368; Kenya n=1,006; New Zealand n=756; Nigeria n=988; Singapore n=739; South Africa n=662; UK n=999; US n=1,055
Mobile Media Behaviors: Why?

Mobile has been thoroughly adopted among users largely because of its convenience and on-the-go availability. 47% of users say they prefer mobile because "it's easy to use" and “it's constantly with them” and finally, 28% agree that a mobile device is a more private way to consume information and communicate.

Q6: Which of the following best describes why you use your mobile device to access content or use applications?

- It’s always there: 47%
- It’s easy to use: 47%
- I can use it privately: 28%
- Boredom: 20%
- Save money: 18%

N=14,777
Mobile Media Behaviors: Where?

Mobile is becoming an important companion, particularly for the in between times. 85% of mobile web users globally use their device while waiting for something, 82% use it while lying in bed and 62% while watching TV. Other usage occasions include while spending time with family (48%), at a social event (45%), commuting (60%) and shopping (43%).

Q7: For mobile activities like surfing the web (excludes calls and SMS), do you typically use your mobile when .... ?

- 85% Waiting for someone
- 82% Lying in bed
- 62% While watching TV
- 60% Commuting
- 48% Spending time with family
- 45% At social gatherings
- 43% Shopping
- 30% In the bathroom

Sample size: n=12,723
*Note: Data excludes UK & US as options are not asked in these markets
Mobile Media Behaviors: What?

Social Media (20%), Entertainment (19%), and Games (17%) are the top 3 mobile media activities among mobile web users globally.

Mobile media activities are only going to continue to grow. The rapid development of social networking sites and the consequent need to be constantly connected are fuelling this mobile growth.

Marketing Implications

On the go and convenience, including the ability to access media anytime and anywhere has made mobile the device of choice for consumers. This represents an opportunity for brands to engage consumers in the mobile space and earn their attention and trust in the path to purchase. Consumers can now respond to a TV ad by conducting product research, comparing prices and reading reviews on mobile without interrupting their viewing experience.

Q8: In a typical day, approximately how much time did you spend on your mobile doing the following:

- Social Media: 20%
- Entertainment: 19%
- Games: 17%
- General Info & Search: 15%
- E-Mail: 12%
- Local Search: 9%
- Shopping: 9%

N: 7,403
Growth in mobile use in the coming year will be primarily driven by social media, app downloads, and search activities.

**Q9: In the next 12 months, for which two mobile activities would you expect your usage to increase the most?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Expected Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media</td>
<td>39%</td>
</tr>
<tr>
<td>Search/Download Apps</td>
<td>26%</td>
</tr>
<tr>
<td>Search for general information</td>
<td>25%</td>
</tr>
<tr>
<td>Watching videos / listening to music</td>
<td>23%</td>
</tr>
<tr>
<td>Playing games</td>
<td>21%</td>
</tr>
<tr>
<td>Send and receive e-mail</td>
<td>20%</td>
</tr>
<tr>
<td>Mobile banking and bill payments</td>
<td>19%</td>
</tr>
<tr>
<td>Shopping</td>
<td>15%</td>
</tr>
<tr>
<td>Search for local information and deals</td>
<td>12%</td>
</tr>
</tbody>
</table>

Sample size: n=12,723

*Note: Data excludes UK & US as options are not asked in these markets*
Comfort Levels are already High with Mobile as an Advertising Platform

Q10: Compared to other forms of advertising like TV or online, how comfortable are you with mobile web and mobile app advertisements (not SMS)?

- More comfortable, I find them to be very useful: 29%
- Equally comfortable, I'm getting used to seeing them: 30%
- Less comfortable, I find them intrusive: 20%
- No opinion, I don't think much about ads on my phone: 21%

59% of mobile users are as comfortable with mobile advertising as they are with TV or online advertising.

N: 14,439
Across Markets

Q10: Compared to other forms of advertising like TV or online, how comfortable are you with mobile web and mobile app advertisements (not SMS)?

Sample size: Global n=14,439; Australia n=997; China n=1,985; France n=615; Germany n=404; India n=1,930; Japan n=1,007; Korea n=1,373; Kenya n=1,013; New Zealand n=756; Nigeria n=1,010; Singapore n=743; South Africa n=666; UK n=942; US n=998
Mobile Ads Present Enormous Opportunities

- 87% of users have noticed mobile ads on their devices
- Mobile ads In-apps are the most noticed among mobile users
- Other sources where users remember seeing mobile ads: 40% on a search engine, 27% on a retailer website 23% on a video website and 17% others

In-app ads has high visibility among mobile users globally.

Q11: I have noticed advertising on my mobile device before.... (Select all that apply)

- In an app: 54%
- On a search engine: 40%
- On a retailer website: 27%
- On a video website: 23%
- Others: 17%

*Note: Data excludes UK & US as options are not asked in these markets

Mobile ads drive action. After seeing mobile ads:

- 80% of users downloaded an app
- 67% of users visited the website of the advertiser
- 52% of users visit the store/retailer/business to get additional information
- 46% of users have purchased products via mobile
- 45% of users locate an advertiser on map
- 37% of users call the advertiser
Accidental clicks on mobile ads are a rarity

- Only 15% of mobile web users frequently click on mobile ads unintentionally.

Q12: How often do you unintentionally click on a mobile ad (i.e. ads displayed on mobile phone e.g. banners, rich media ads)?

- Never
- Rarely (less than 5% of the time)
- Occasionally (5-10% of the time)
- Frequently (10-25% of the time)
- Very frequently (over 25% of the time)

ONLY 15% OF MOBILE WEB USERS FREQUENTLY CLICK ON MOBILE ADS UNINTENTIONALLY

Marketing Implications:

According to Berg Insights, mobile will account for 4.4 percent of total global ad spend across all media as early as 2017 and the global mobile marketing and advertising market will grow from $5 billion in 2011 to $26 billion in 2017. The majority of the users are comfortable with mobile advertising and this is only bound to increase as advertisers create more engaging experiences through rich media and as publishers optimize their sites for mobile.

N=9,127
*Note: Data excludes UK & US as options are not asked in these markets
Across Markets

Q12: How often do you unintentionally click on a mobile ad (i.e. ads displayed on mobile phone e.g. banners, rich media ads)?

Very frequently (over 25% of the time)
Frequently (10-25% of the time)
It is fairly unlikely to click on mobile ads by mistake across markets

Sample size: Global n=9,127; Australia n=716; China n=1,494; France n=397; Germany n=208; India n=1,480; Japan n=545; Korea n=908; Kenya n=914; New Zealand n=609; Nigeria n=734; Singapore n=580; South Africa n=541

*Note: Data excludes UK & US as options are not asked in these markets
Mobile ads are on par with TV and online in terms of impact on purchase decisions globally.
Mobile Ads Throughout the Purchase Process

- Mobile devices have become an indispensable shopping tool and are used across channels and throughout the research and decision-making process.

- Mobile advertising is also proving to be effective across purchase funnel: 75% of respondents claim they have been introduced to something new via their device, 67% feel that it has provided them with better options and 46% said they had made purchases using their mobile device.

Marketing Implications

The rapid adoption of smartphones and mobile Internet is clearly making mobile an end-to-end transactional. Beyond creating brand awareness, mobile ads are now creating a unique medium of location-based, social communication to help influence and drive the purchase process. The role of mobile advertising will continue to expand with technological advances as advertisers focus on reaching consumers with targeted and personalized information depending on user context.

Q14: Has mobile advertising ever.

- Awareness: 75% - Introduced you to something new.
- Favorable opinion: 67% - Provided you with better options.
- Consideration: 69% / 55% - Helped you find something nearby. Caused you to reconsider a product.
- Shopping: 45% - Influenced your in-store purchase.
- Sale: 46% - Influenced you to buy via your mobile.

N=12,723

*Note: Data excludes UK & US as options are not asked in these markets
M-commerce

- Mobile advertising drives mobile purchases - 66% have conducted transactions via mobile

- Commerce behavior is extending past digital goods and now includes physical goods, financial transactions, travel and entertainment purchases

Q15: Which, if any, of the following goods have you ever purchased via your mobile? (Select all that apply)

- Digital goods (e.g. apps, games, e-books, music, videos, ringtones)
- Physical goods (e.g. electronics, clothes)
- Financial (e.g. bill payments, peer-to-peer payments)
- Entertainment (e.g. movie tickets)
- Travel (e.g. train tickets)

66% have spent money on an activity via mobile.

Commerce behavior is extending past digital goods, and now includes financial and physical goods.

N=12,723

*Note: Data excludes UK & US as options are not asked in these markets
GROWTH

80% of consumers plan to conduct mobile commerce in the next 12 months, a 14% increase from where we are today.

N=12,723
*Note: Data excludes UK & US as options are not asked in these markets

Marketing Implications
Retailers can incorporate mobile by offering special discounts, mobile coupons and mobile shopping options with targeted advertising. Consumers searching for convenient options are looking at smartphones to browse digital storefronts, research products, look for deals and make purchases while on the move.
Across Markets

Q16: Have you ever purchased via your mobile?

<table>
<thead>
<tr>
<th>Country</th>
<th>Ever spent via Mobile</th>
<th>Would ever spent via Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>66%</td>
<td>14%</td>
</tr>
<tr>
<td>Kenya</td>
<td>78%</td>
<td>14%</td>
</tr>
<tr>
<td>Korea</td>
<td>72%</td>
<td>12%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>70%</td>
<td>12%</td>
</tr>
<tr>
<td>Australia</td>
<td>70%</td>
<td>9%</td>
</tr>
<tr>
<td>Nigeria</td>
<td>70%</td>
<td>19%</td>
</tr>
<tr>
<td>Japan</td>
<td>67%</td>
<td>7%</td>
</tr>
<tr>
<td>South Africa</td>
<td>66%</td>
<td>18%</td>
</tr>
<tr>
<td>China</td>
<td>64%</td>
<td>17%</td>
</tr>
<tr>
<td>Singapore</td>
<td>62%</td>
<td>15%</td>
</tr>
<tr>
<td>India</td>
<td>61%</td>
<td>18%</td>
</tr>
<tr>
<td>France</td>
<td>57%</td>
<td>11%</td>
</tr>
<tr>
<td>Germany</td>
<td>50%</td>
<td>8%</td>
</tr>
</tbody>
</table>

2 out of 3 mobile users have spent via their mobile phones

Sample size: Global 12,723; Australia n=1,008; China n=2,001; France n=626; Germany n=411; India n=2,004; Japan n=1,010; Korea n=1,381; Kenya n=1,027; New Zealand n=763; Nigeria n=1,053; Singapore n=757; South Africa n=682
Conclusion

In an increasingly mobile world, digital and multi device behavior is now mainstream with a full breadth of options open to marketers. Mobile devices are always on and highly personal with access to services and content anywhere and at any time, transforming the way consumers interact with brands. This has created a situation where the expectations of personalized information are high.

Mobile now represents a healthy share of overall media consumption and marketers need to look at how to define success in marketing and tailor their messages to each of the many devices now available. Marketers should evaluate mobile behavior patterns to create campaigns that will connect with consumers. Mobile continues to be a key and growing strategy for many companies as browsing, shopping and networking are all literally shifting to mobile. The growing percentage of Internet traffic from connected mobile devices demonstrates the importance of this channel.
Next Steps for Marketers

- **Define Objectives** – Clearly define your approach across all the channels and how mobile fits into this strategy

- **Research and Analyze** - It is important for marketers and advertisers to collect the right data, find those using services such as mobile shopping and mobile payments, and understand how they want to be communicated with

- **Integrate and innovate** – Add mobile to an integrated campaign comprising existing offline and online channels and deliver consistent messaging. Create interactive and innovative campaigns on mobile to connect in places and times other channels don’t serve to attract consumers

- **Get the basics right, but don’t stop there**: While optimizing websites and E-mails for mobile is important, mobile marketing can go so much further. Make the most of the real opportunity that mobile presents – to reach consumers on the go, when they are at specific locations, with appropriate messages and interactive content that engages them in new and exciting ways

- **Tap social via mobile**: Marketers can enable mobile users to easily and quickly enter a company’s social media sphere. Mobile apps and icon-embedded marketing content are perfect gateways for mobile users to follow or like a company, or to post reviews. Give users a fun reason to do so, or reward them when they do to increase engagement

- **M-Commerce**: Make it easy for consumers to make purchases on a mobile device by streamlining the check-out process and reducing the number of clicks to purchase
References

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2. Unlocking the Power of Mobile, Initiative
5. Mobile Web Watch 2012, Accenture
7. The Connected Consumer, the e-tailing group, 2011
8. The Rise of Mobile Marketing New Opportunities for Consumer Companies and Mobile Operators, Booz & Company

Additional Resources

This whitepaper represents a fraction of the valuable findings in the Global Mobile Media Consumption Study conducted by InMobi, Decision Fuel, and On Device Research.

If you would like to see more detailed presentations, you can download the latest InMobi Global Mobile Media Consumption Presentations for free here: www.inmobi.com/insights
InMobi is an innovative mobile technology company that enables the world’s leading brands, developers, and publishers to engage global consumers. InMobi builds mobile-first technology platforms that leverage advances in big-data, user behavior, and cloud-based architectures to simplify advertising. Agencies and advertisers leverage InMobi platforms to create HTML5 rich media ads and engage 578M consumers across 165 countries. Developers and premium publishers use InMobi platforms to acquire and monetize their mobile apps and their mobile websites across the globe. With offices in multiple continents, InMobi provides global reach with local service and support across the globe. InMobi is venture-backed by investors including: SoftBank, Kleiner Perkins Caufield & Byers and Sherpalo Ventures.

To learn more, please visit www.inmobi.com, follow us on Twitter @InMobi, or discover the latest mobile insights at www.inmobi.com/insights/. 
On Device Research uses the mobile internet to gain access to consumer opinions any time or location. Mobile research brings fresh, instant responses that accurately capture consumer’s feelings, thoughts and opinions, in a quick and cost effective way.

Through our proprietary technology and skill at creating mobile surveys On Device Research transcend geographical barriers, delivering meaningful, targeted data from profiled global respondents. Our technology allows clients to commission projects they've never been able to do before, especially in emerging markets. So far On Device Research has delivered 1 million surveys across 50 countries.

Specialties

Research Partners

At Decision Fuel, we take a fresh approach to consumer insights. We help our clients reach informed decisions through quality research that's simple to use, lightning-fast and surprisingly cost-effective.

We use a custom-built technology platform to design and deliver short, tailored consumer surveys over mobile devices. Research can be set up in minutes, deployed instantly and tracked in real time. Full analytics and insight are delivered with unprecedented speed and clarity.

Decision Fuel combines all the features research buyers need and strips away anything that gets in the way of better, faster, more informed decisions. We can help your company unlock consumer thinking in the world's most challenging, dynamic and high-growth markets.

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