

Mobile's Role in a Consumer's Media Day: Smartphones and Tablets Enable Seamless Digital Lives

An IAB Mobile Center of Excellence Research Program
July 2012

1) “Sound Bites”

2) Methodology

3) Key Findings

4) Analysis of Key Questions:

- How does mobile usage impact (substitute or complement) other media usage?
- How does mobile usage and impact vary for different consumer demographic or psychographic segments?
- How do consumers perceive mobile as a part of their daily lives?
- What is the receptivity, interest and action towards advertising – across key usage and impact scenarios identified?
- What does this mean for members of the advertising and marketing ecosystem?

5) Supplemental Tables and Charts

“Tablets do not only cannibalize print media, 24% of users watch less traditional TV due to tablet based viewing. This is especially pronounced for Women.”

“77% of users interact with ads whilst using a tablet compared to only 53% on smartphones.”

“Men are more likely to respond to ads and then purchase high quality goods, especially whilst using a tablet.”

“When people are at home relaxing and when on public transport are the prime times when consumers are most receptive to ads; although in the case of public transport, their general engagement is comparatively low.”**

“Location is the 4th most important factor enticing smartphone users to interact with ads after coupons, specific product searching, and favorite brands. It is far less important for tablet users who identify the sites they visited, apps they used, fun activities and daily routine as bigger factors than location when clicking on ads.”

*** Note: The total available market is significantly smaller for users of public transportation in the US than the total available market of the general population.*

ABI Research employed an approach leveraging an online consumer survey targeting smartphone and tablet device users that use mobile data services.

As part of this program, ABI Research tested a hypothesis examining that the role of mobile in consumers' media lives is very closely related to three key attributes – time, location and device. Some of the areas examined to test this hypothesis included:

- How do time, location and device type impact media consumption and behavior? How can consumers' media profile/ activities be holistically characterized by these three attributes?
- How do consumer mobile activities and behaviors revolve around these three attributes? And how is media consumption impacted?
- How can mobile consumer interest, receptivity and action towards advertising be characterized based on these three attributes? (or key profiles – e.g. tablets at home, tablets at work, smartphones at shopping centers, etc.)

Survey Sample:

- For this study, sample was sent to 50% males and 50% females in the US; and aimed for the following typical census age groups: 18-29, 30-39, 40-49, 50-64, and 65+.
- To make sure that we found people who had a tablet or smartphone, respondents were specifically invited who were previously profiled as owning these devices. This means that the final results are close to how tablet and smartphone owners would respond, but they are not representative of the general population.
 - US Consumers that use a smartphone at least weekly and use data services – 552 completes
 - US Consumers that use a tablet at least weekly and use data services – 563 completes

KEY FINDINGS

- **Mobile audience not monolithic.** When, where and on what device matters.
- **Mobile value propositions vary by device type:**
 - **Smartphones** are mission-critical devices for “life,” with nearly 70% of smartphone users saying they “won’t leave home without it.”
 - **Tablets** are a media consumption hub, with nearly 70% of tablet users reporting that their tablet is an “entertainment device.”
- **Traditional media consumption affect of mobile.** Two audiences are emerging – one that drives traditional media through mobile; another that detracts.
- **‘Mobile’ does not mean ‘remote’.** Nearly all smartphone and tablet users (91% and 97%, respectively) report using their device at home – the most widely used location for mobile activity.



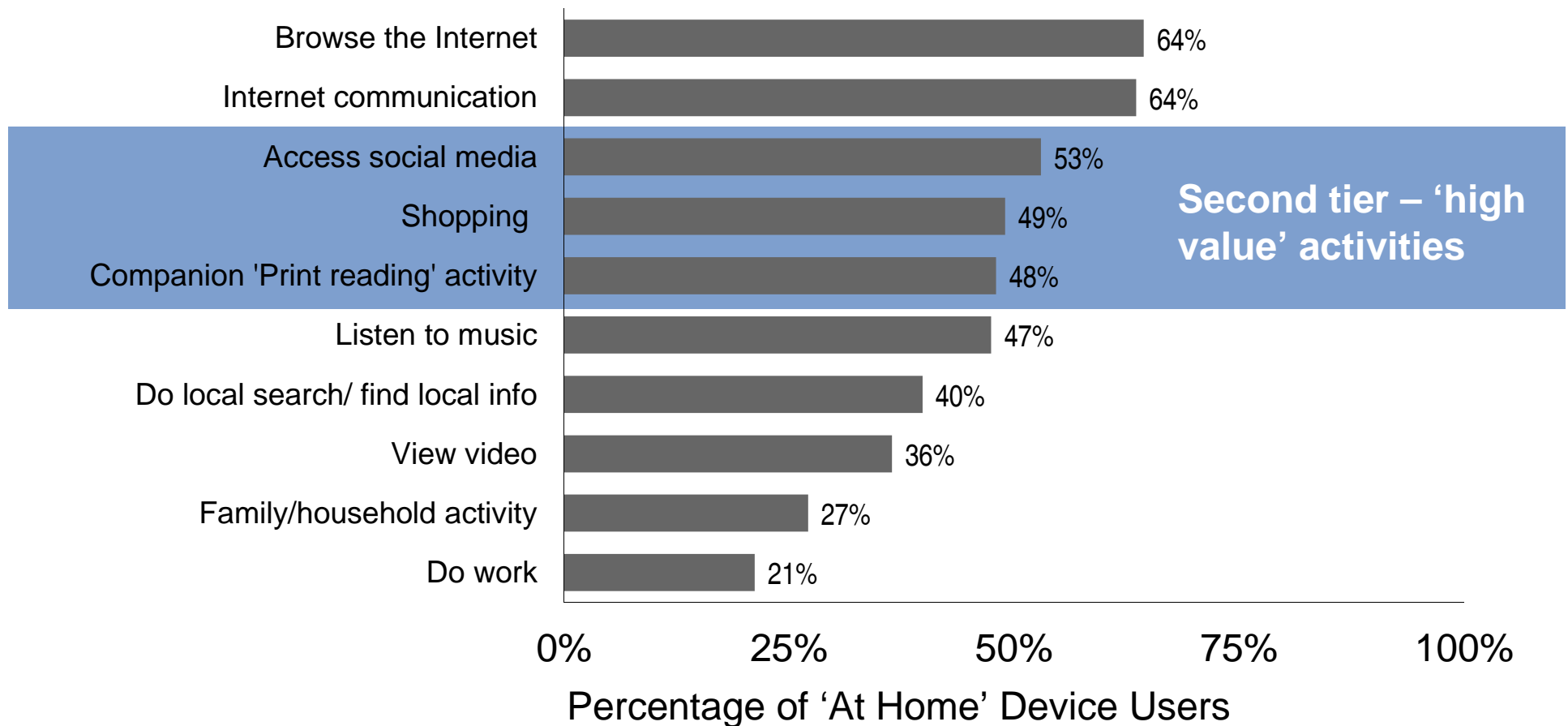
Photo: Creative Commons (vernieman)

- **Time of day makes a difference. Leisure activities at home are when consumers say most likely to use mobile and also when they are most receptive to advertising – on both devices.**
- **Engagement on tablets surpasses engagement on smartphones. Across key dimensions – use/consumption, the receptivity and action related to advertising, and the activity of shopping – tablet users are more easily engaged.**
- **Smartphone engagement surprising. With wider usage, clear reliance on their smartphones across high-value activities at home → while reading print, watching TV and while traveling.**
- **Use of Mobile OS shows few profound differences in user base. Some key differences include:**
 - iOS users show more engagement with advertising
 - iOS users also show more propensity for on-device purchasing

MOBILE'S IMPACT ON OTHER MEDIA USAGE

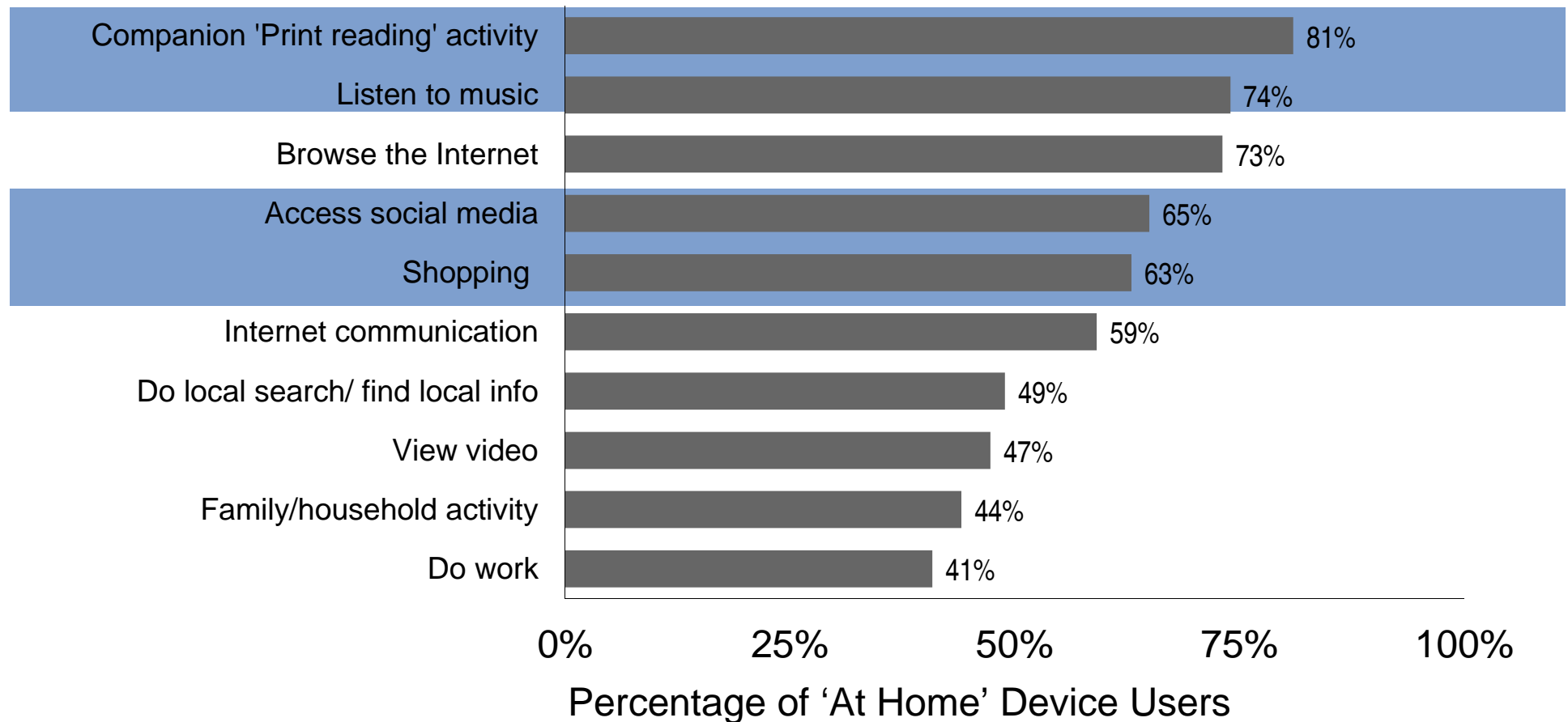
- **The Device impacts traditional media consumption and the type plays a role in the magnitude of that change.**
 - Approximately one-quarter of smartphone users report that their device is changing the volume of print and TV content.
 - Tablet's effect appears to be nearly double the effect of smartphone
- **Device types enable users to interact with advertising in contextually relevant and/or most receptive situations. Like consumption, device type also plays role in the magnitude.**
- **Shopping and purchase behavior on mobile follows suit – the device type enables effective and efficient shopping interactions in contextually relevant or user's most receptive situations.**
- **While a higher percentage of users shop with their smartphone, tablet users report spending more on average from their device.**

Use of Smartphone While Reading Print Magazines/ Newspapers – at Home



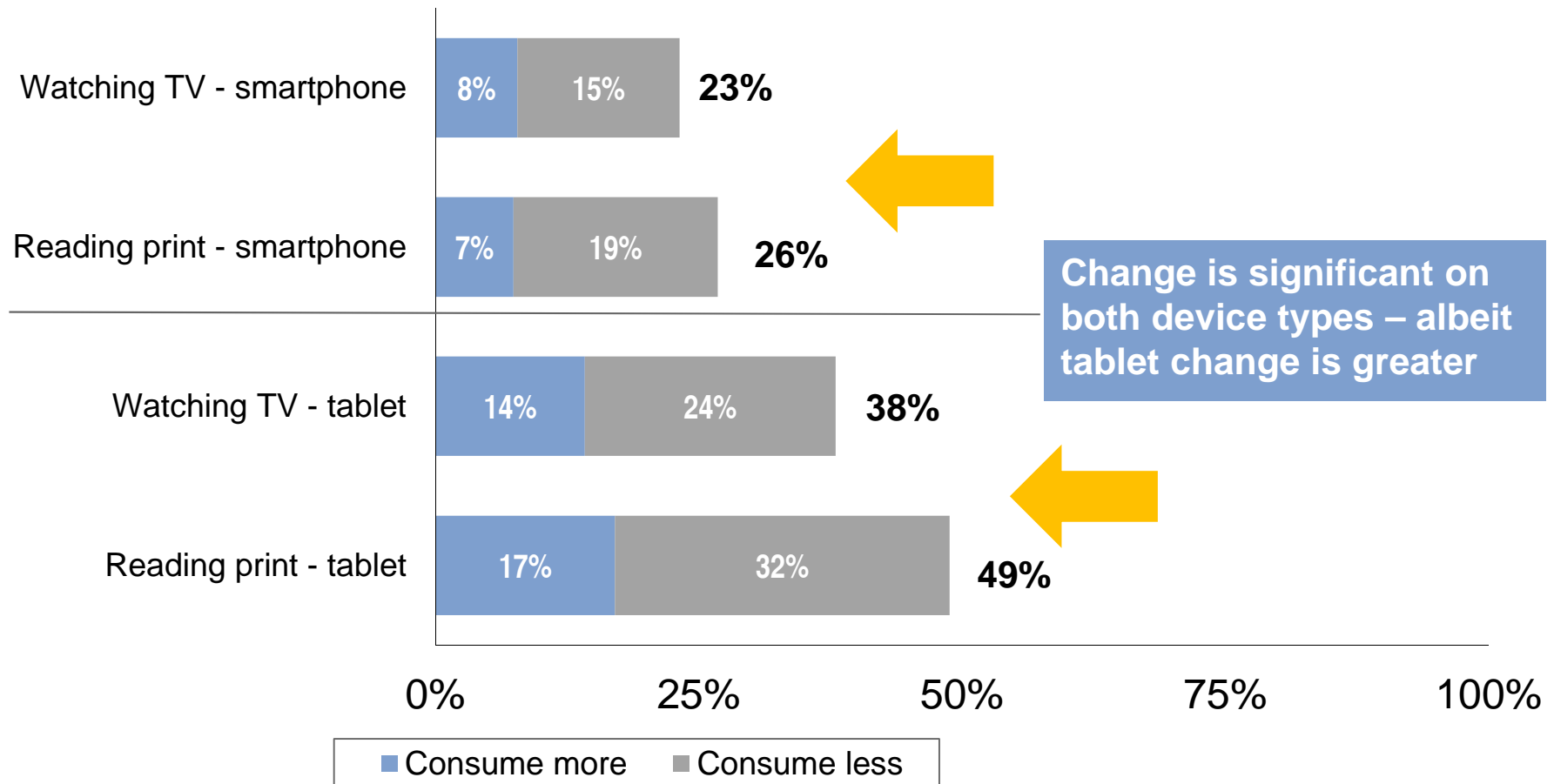
Question: Which of the following activities have you done with your [device] while reading a print magazine or newspaper? (please select all that apply)

Use of Tablet While Reading Print Magazines/ Newspapers – at Home



Question: Which of the following activities have you done with your [device] while reading a print magazine or newspaper? (please select all that apply)

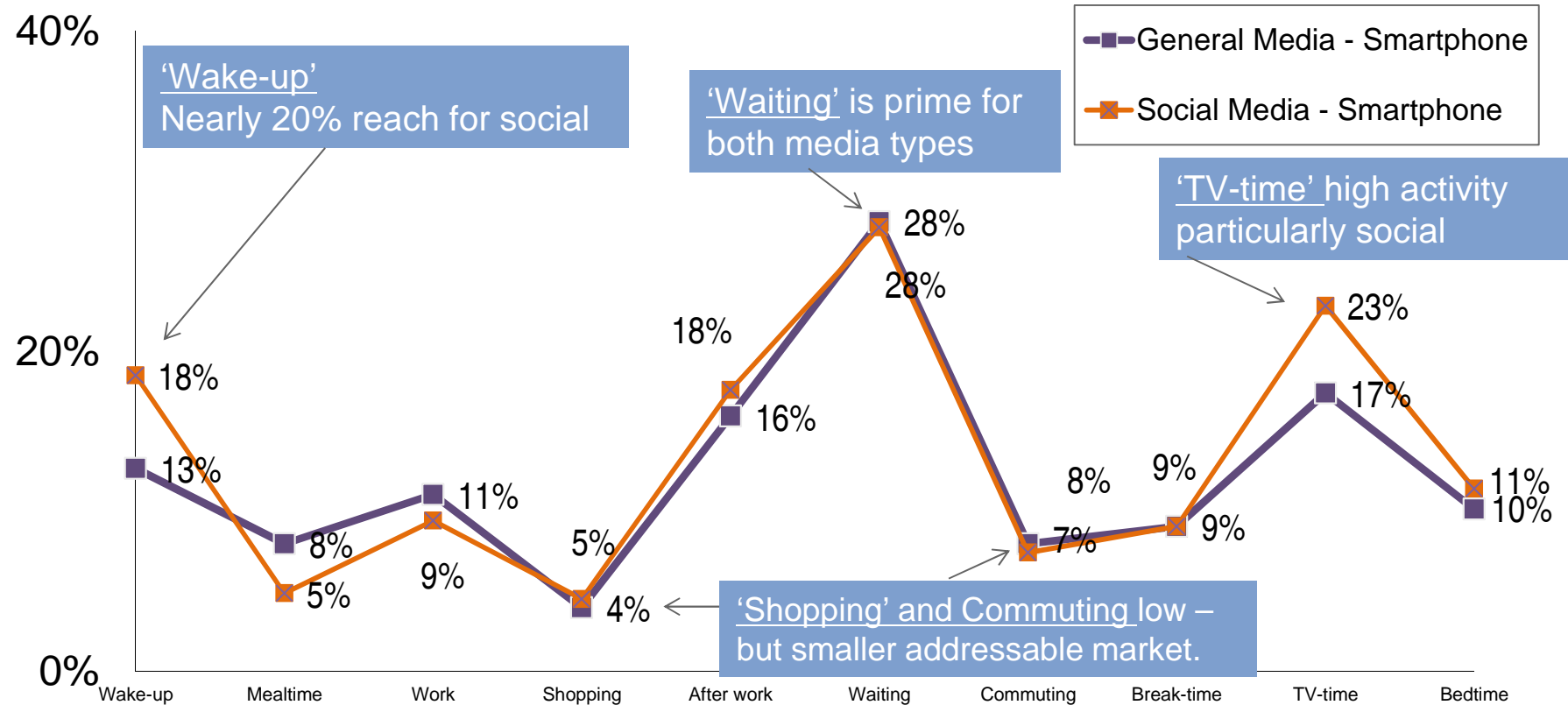
Mobile Is Driving Change in Traditional Media Consumption



Percentage of Mobile Data Service Users on Device Type

Question: How, if at all, has accessing entertainment, video, news and other content on your [device] affected your [TV watching/ Print News/ magazine reading] in the past year? (Select one)

Smartphone Media Usage Patterns

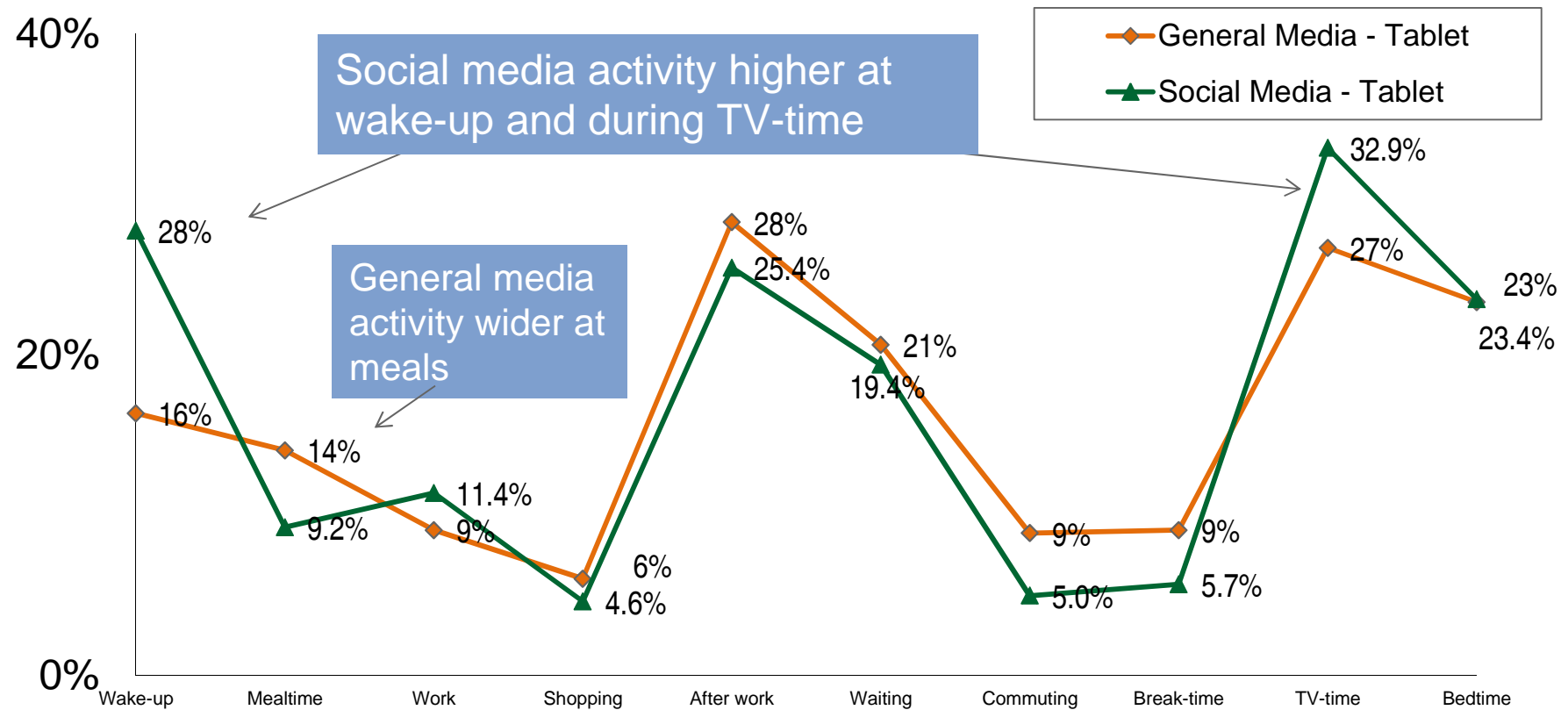


Percentage of Smartphone Mobile Services Users

Question: When, if at all, do you **most** use [general media] on your smartphone? (Select up to 3)

Question: When, if at all, do you **most** use [social media] on your smartphone? (Select up to 3)

Media Usage Patterns on Tablet



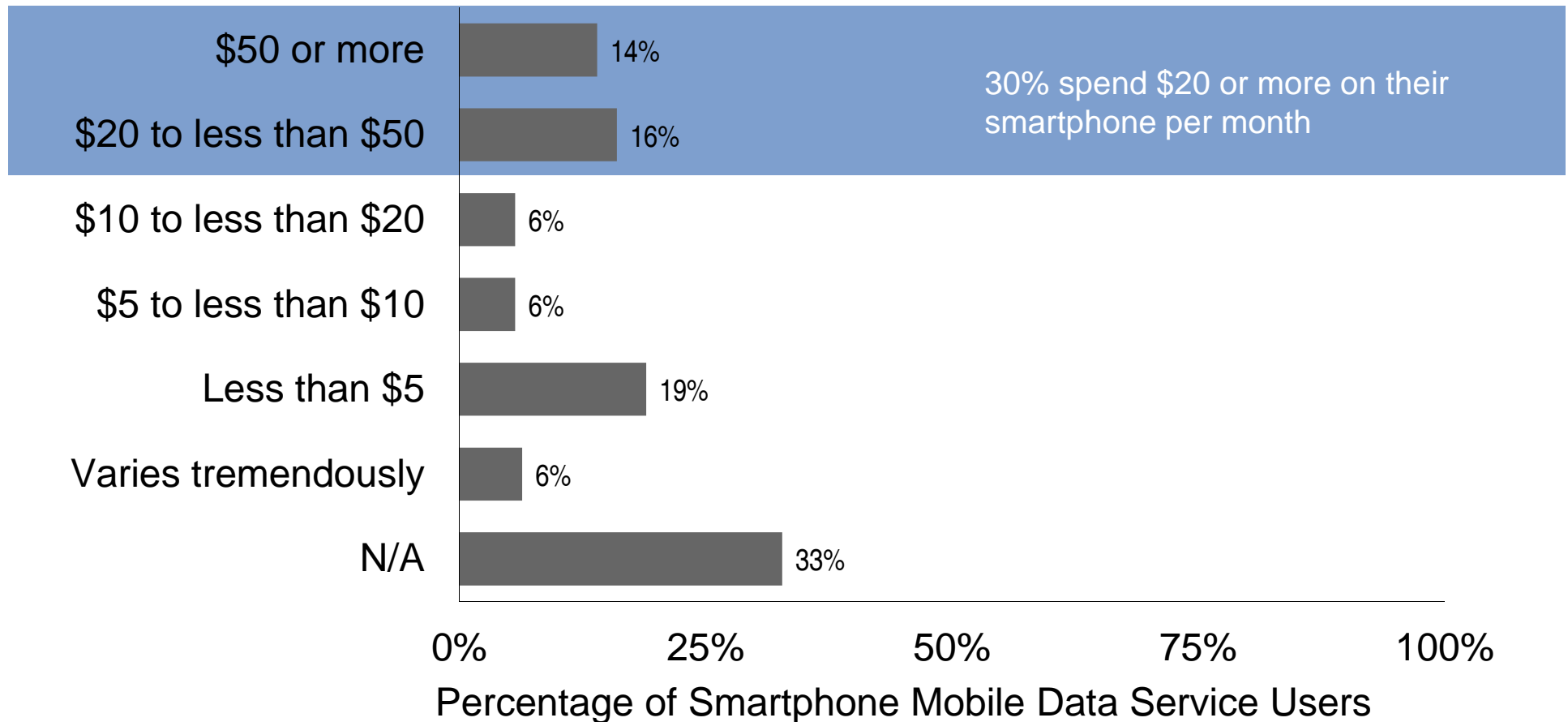
Percentage of Mobile Services Users by Device

Question: When, if at all, do you **most** use [general media] on your tablet? (Select up to 3)

Question: When, if at all, do you **most** use [social media] on your tablet? (Select up to 3)

MOBILE USAGE AND IMPACT VARIATIONS FOR CONSUMER DEMOGRAPHIC OR PSYCHOGRAPHIC SEGMENTS

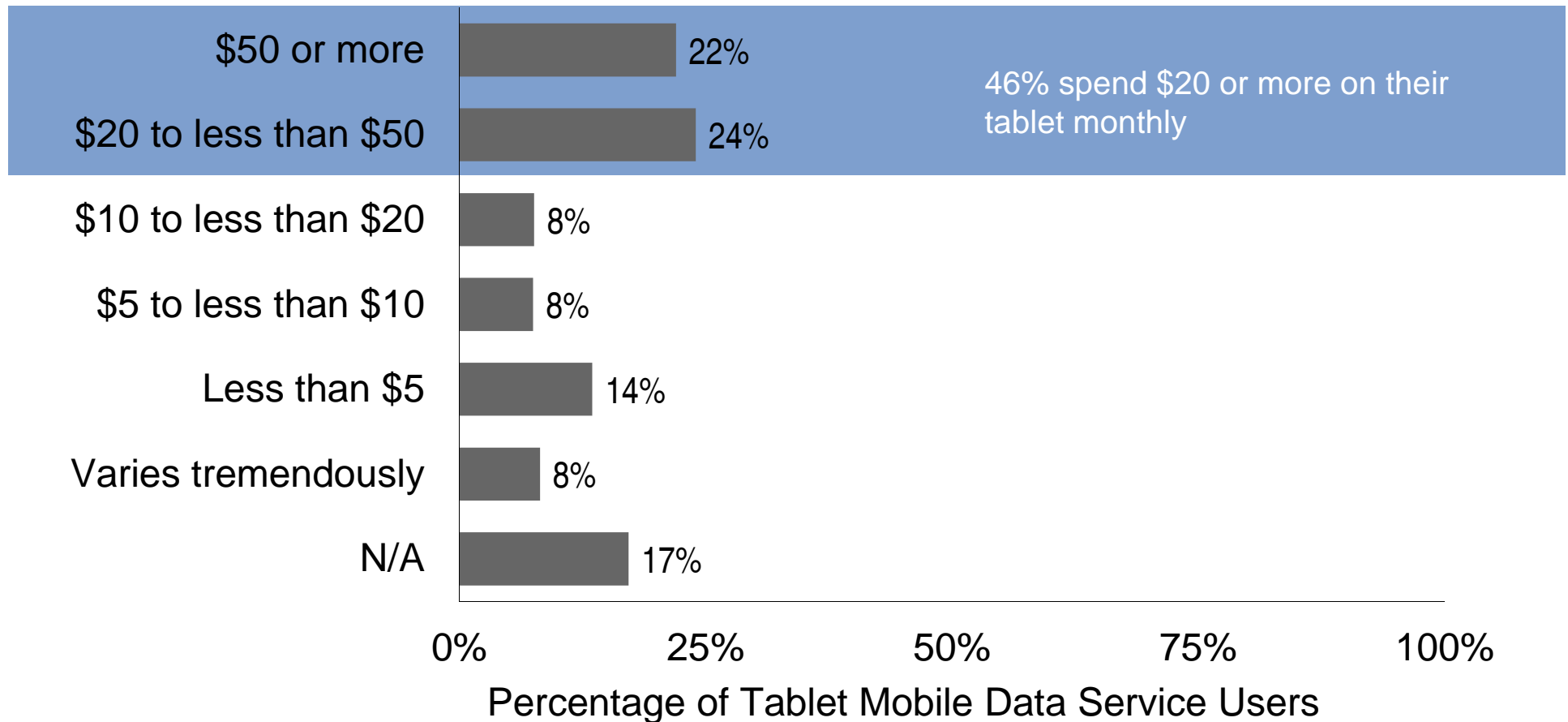
Monthly Spend from Smartphone



Question: Approximately how much, if anything, would you estimate that you spend on your smartphone (e.g. purchases of digital or physical goods on a smartphone) in a typical month?

Over 80% Make Purchases from their Tablet

Monthly Spend from Tablet



Question: Approximately how much, if anything, would you estimate that you spend on your tablet (e.g. purchases of digital or physical goods on a tablet) in a typical month?

Tablet
'Big Spenders'

Spend \$50 or more

"Tablets use shows significant change in media consumption for these influencer types"

- **22% of tablet mobile data service users**
- 49% Male, 32% under 29
- 56% 1 or more children in HH
- 73% respond to ads on tablet – weekly or more frequently
- Ad types most receptive to: 'shopping', 'fun' and 'coupons'
- **28% watch less TV due to tablet; 28% watch more TV**
- **37% read less content from print due to tablet; 32% more print**

"My tablet makes me more efficient" (64%)

Smartphone
'Big Spenders'

Spend \$20 or more

"Driving personal and business success for these influencer types"

- **20% of smartphone mobile data service users**
- 53% Male, 37% under 29
- 52% 1 or more children in HH
- **45% respond to ads on smartphone – weekly or more frequently**
- 25% watch less TV due to smartphone; 14% watch more TV
- 33% read less content from print due to phone; 15% more print

"My smartphone makes me more efficient" (56%)

*Note – does not include those that do not spend and those reporting spend varies tremendously.

Scottsdale

New York

London

Singapore

Smartphone
'Ad Responders'

Respond to ads from
smartphone

"Skewing a Bit Older"

52% of smartphone mobile data service users

- 53% Male, **19% under 29**
- 38% 1 or more children in HH
- Ad types most receptive to: current shopping', 'coupons', 'favorite brands'
- 84% use social media on smartphone
- **23% watch 'less TV' and 26% read 'less print' due to smartphone activity**
- **73% make purchases** monthly from smartphone

Tablet 'Ad
Responders'

Respond to ads from
tablet

"Young and Active Socially"

77% of tablet mobile data service users

- 52% Male, **31% under 29**
- 50% 1 or more children in HH
- Ad types most receptive to: current shopping', 'coupons', 'favorite brands'
- 91% use social media on tablet
- **27% watch 'less TV' and 36% read 'less print' due to tablet activity**
- **89% make purchases** monthly from tablet

TV Media
'Cannibals'

Consume 'Less TV'
due to tablet use

"Tablet serving as foundation for media consumption and purchase for nearly 1/3 of users"

32% of tablet mobile data service users

51% Male; 30% under 29

53% 1 or more children in HH

55% respond to ads on tablet – weekly or more frequently

Most receptive ad types: current shopping', 'coupons', and 'favorite brands'

92% make purchases monthly from tablet

Print
'Media Cannibals'

Consume 'Less Print'
due to tablet use

"Younger influence shows drive for new consumption profile"

23% of tablet mobile data service users

48% Male, **37% under 29**

52% 1 or more children in HH

59% respond to ads on tablet – weekly or more frequently

Ad types most receptive to: 'current shopping', 'coupons', and 'fun'

93% make purchases monthly from tablet

Identifying as 'Multi-taskers' – 'Duals' Use Mobile Devices to Drive Entertainment and Efficiency

| | | |
|-----------------------|--|---|
| Smartphone 'Duals' | View device for entertainment and efficiency | <p>General</p> <ul style="list-style-type: none"> • 25% of smartphone mobile service users • 56% women (vs. 51% average) • Somewhat lower income <p>Use</p> <ul style="list-style-type: none"> • Very active across locations and activities, particularly social media, shopping and local search and mapping/ navigation • Social media activities (86% of the segment use social media on smartphone) • Media consumption tends on average with the overall audience <p>Responsiveness</p> <ul style="list-style-type: none"> • 32% respond to ads on smartphone – weekly or more frequently ; higher than avg. • More likely to 'take action' from an ad – investigate a product and 'visit local business' vs. average • More likely 'bargain hunters, brand loyalists and multi-taskers' than average |
| | View device for entertainment and efficiency | <p>General</p> <ul style="list-style-type: none"> • 29% of tablet mobile service users • 54% women (vs. 51% average) • Income on par with average <p>Use</p> <ul style="list-style-type: none"> • Very active across locations and activities - particularly mapping/ navigation, music listening • Social media activities (95% of the segment use social media on tablet) • 42% say 'read 'less print news and magazines' because of tablet (vs. 32% on average) <p>Responsiveness</p> <ul style="list-style-type: none"> • More likely to 'take action' from an ad – investigate a product and 'view a video' vs. the average • 93% purchase from tablet (vs. average of 83%) • More likely are 'multi-taskers' and 'pay more for high quality products' than average |

Device Use Shows A Different 'Shopper' Story

Smartphone 'Shoppers'

Use Device 'While Out Shopping'

General

- 56% of smartphone mobile service users
- 56% women
- **Income and age** tends to **the average**

Use

- Particularly active user of smartphone **in car** and **other locations outside of the home**
- **Social media** activities (80% of the segment use social media on smartphone)
- **Media consumption trends similar to the overall audience**

Responsiveness

- 26% **respond to ads** on smartphone – **weekly or more frequently** – **similar to average**
- More likely to **'take action'** from an ad – actions taken are similar to average
- Types of ads interested similar to average
- More likely **'bargain hunters, brand loyalists and multi-taskers'** than average

Tablet 'Shoppers'

Use Device 'While Out Shopping'

General

- 28% of tablet mobile service users
- 57% report **kids present** in household
- 44% **are 29 and under**

Use

- **Very active** across locations/activities particularly at home - **while watching TV** and **other leisure activities**
- **Social media** activities (94% of the segment use social media on tablet)
- More likely to **consume more traditional TV** because of tablet

Responsiveness

- 74% **respond to ads** on tablets – **weekly or more frequently** – particularly receptive during **leisure time at home**
- More **likely to 'take action'** from an ad across ad types; those based on **location, daily routine** and **'fun'** are more widely used in this group than the average
- 64% spend **more than \$20 per month** from tablet
- More likely to **'pay more for high quality products'** than average

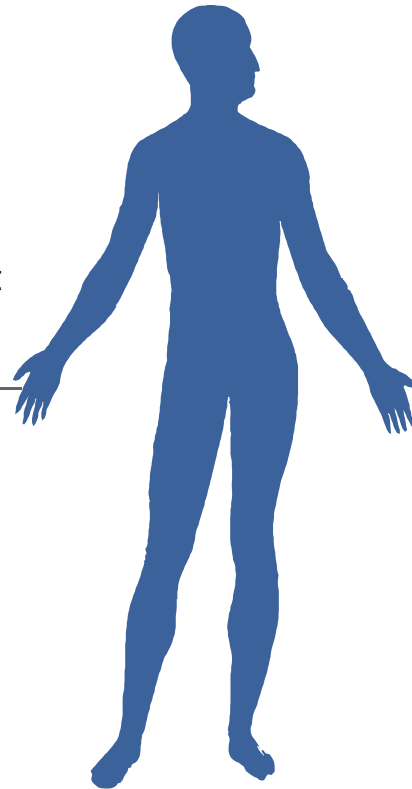
Female

Smartphone

- Bias to **social media** activities (81% of women using on smartphone)
- 26% **respond to ads** on smartphone – **weekly or more frequently**
- 18% **watch 'less TV content'** due to smartphone media consumption
- Women **prefer smartphone** over tablet for social media

Tablet

- **Social media** bias (90% using)
- 42% **respond to ads** on tablet – **weekly or more frequently**
- Women love **getting bargains** (69% vs. 53% of men) and much **more likely multi-taskers.**



Male

Smartphone

- Less social (68% use on smartphone) with some bias to **work** activities
- 24% **respond to ads** on smartphone – weekly or more frequently
- 11% **watch 'more TV content'** due to smartphone media consumption
- Men **prefer tablet** over smartphone for social media

Tablet

- Men more likely to respond to **ads on tablets and more frequently - weekly or more often (50%)**
- Men more **willing to pay for high quality** products (37% vs. 22% for women)
- 69% of men **have no kids** in HH (vs. 50% of women)

Ad preferences and actions taken from advertising similar for the genders - though magnitude can vary.

Kids Present
Smartphone HH's

Mobile Data Service Users

General

- 35% of smartphone mobile service users

Use

- **Tend to be very social media active** (85% of the segment use social media on smartphone vs. 69% of those w/ no kids)
- More likely to use smartphone **while out shopping** (62% vs. 52% of those w/ no kids)
- More likely to **watch 'less TV'** as a result of smartphone activity (21% vs. 12% of those w/out kids)

Responsiveness

- **31% respond to ads** on smartphone – **weekly or more frequently** (vs. 21% of those w/ no kids) and widely across activities/ situations with the exception of 'at work or while working'
- More likely to **respond to ads generally**; show more propensity towards **recent activity** (online, TV watching, online)purchases) vs. those with kids
- More likely to **take action** as a result of viewing an ad (87% vs. 76% of those w/out kids)
- **77% make purchases** from smartphone

'Kids Present'
Tablet HH's

Mobile Data Service Users

General

- 54% of tablet mobile service users

Use

- More likely to use tablet **across activities and locations** – particularly **while out shopping** (34% vs. 21% of those w/ no kids).
- **Very social media active** (90% of the segment use social media on tablet)

Responsiveness

- **55% respond to ads** on tablet – **weekly or more frequently** (vs. 38% of those w/ no kids)
- More likely to **report change in media consumption** (TV and Print) – changes however both directions '**watching TV/ reading Print more**' and '**watching TV/ reading Print less**'
- **90% make purchases** from tablet

Ranking of Ad Receptiveness By Ad Type By Smartphone OS

| | All | iOS | BlackBerry | Android | Windows Phone/Mobile |
|---|-----|-----|------------|---------|----------------------|
| Ads for coupons related to something you are shopping for | 1 | 1 | 3 | 1 | 1 |
| Ads related to something you are shopping for | 2 | 2 | 1 | 2 | 2 |
| Ads related to your favorite brands | 3 | 3 | 2 | 3 | 6 |
| Ads related to your location | 4 | 4 | 4 | 7 | 3 |
| Ads related to sites you've visited online or an app you use | 5 | 6 | 6 | 4 | 4 |
| Ads that you think are fun | 6 | 7 | 5 | 6 | 11 |
| Ads related to your daily routine | 7 | 8 | 6 | 4 | 11 |
| Ads related to recent online purchases | 8 | 5 | 10 | 8 | 6 |
| Ads based on information you give the ad at the beginning | 9 | 11 | 10 | 9 | 8 |
| Ads related to recent TV/ radio viewing | 10 | 9 | 6 | 11 | 8 |
| Ads related to your age/ gender, if you have kids or other demographic information | 11 | 9 | 10 | 12 | 8 |
| Ads based on information that that you have shared publicly via Facebook, Twitter, etc. | 12 | 13 | 6 | 10 | 4 |
| Some other type of ad | 13 | 11 | 13 | 13 | 13 |

Question: What kinds of ads are you most likely to respond to on your smartphone? (please select all that apply)

Ranking 1-13 with 1 representing most device users to respond to ad type; 13 least number of device users that respond to ads

Ranking of Ad Receptiveness By Ad Type By Tablet OS

| | All | iOS | Android | Windows |
|---|-----|-----|---------|---------|
| Ads related to something you are shopping for | 1 | 1 | 1 | 1 |
| Ads for coupons related to something you are shopping for | 2 | 2 | 2 | 2 |
| Ads related to your favorite brands | 3 | 3 | 3 | 5 |
| Ads that you think are fun | 4 | 4 | 4 | 3 |
| Ads related to sites you've visited online or an app you use | 5 | 5 | 5 | 5 |
| Ads related to your daily routine | 6 | 6 | 6 | 7 |
| Ads related to your location | 7 | 7 | 10 | 8 |
| Ads related to recent online purchases | 8 | 8 | 9 | 8 |
| Ads related to recent TV/ radio viewing | 9 | 9 | 6 | 4 |
| Ads based on information you give the ad at the beginning | 10 | 10 | 6 | 12 |
| Ads related to your age/ gender, if you have kids or other demographic information | 11 | 11 | 11 | 10 |
| Ads based on information that that you have shared publicly via Facebook, Twitter, etc. | 12 | 12 | 12 | 11 |
| Some other type of ad | 13 | 13 | 13 | 13 |

Question: What kinds of ads are you most likely to respond to on your tablet? (please select all that apply)

Ranking 1-13 with 1 representing most device users to respond to ad type; 13 least number of device users that respond to ads

Over 50s
Smartphone

Mobile Data Service Users

General

- 41% of smartphone mobile service users

Use

- Tend to be less active – particularly with social media, video and music; **slightly** more likely to use **local search/ navigation in some situations** – outside the home and shopping
- **Social media** activities (60% of the segment use social media on smartphone)
- More likely to read **digital versions of magazines at work** and **look up items while at work** computer (vs. ‘under 50’ audience)
- More likely to say smartphone **hasn’t changed TV or Print** consumption (vs. ‘under 50’ group)

Responsiveness

- 23% **respond to ads** on smartphone – **weekly or more frequently**; close to ‘under 50’
- **Less likely** to show interest or **respond to ads across the board** with the **exception of items related to ‘current shopping’ activities.**
- 56% **make purchases** from smartphone (vs. 73% of the ‘under 50’ group)

Over 50s
Tablet

Mobile Data Service Users

General

- 64% of tablet mobile service users

Use

- Tend to be less active; tend to be closer to the ‘under 50’ group for **reading related** and **local search activities**
- **Social media** activities (78% of the segment use social media on tablet - use is high but there is less propensity to use across activities)
- More likely **active at work or during work activities**

Responsiveness

- 32% **respond to ads** on tablets – **weekly or more frequently** (vs. 54% of the ‘under 50’ group)
- 82% **will take action** from an ad (vs. 93% of the ‘under 50’ group)
- 73% **make purchases** from tablet (vs. 88% of the ‘under 50’ group)
- More widely report that smartphone **hasn’t changed TV or Print** consumption (vs. ‘under 50’ group)

CONSUMER PERCEPTIONS OF MOBILE AS A PART OF THEIR DAILY LIVES



Photo: Steve J O'Brien

- **An “always on my person” device: Smartphone users navigate inside, outside and in-between destinations.**

“I never leave home without it”
69% of smartphone respondents

- **An entertainment hub: tablet users regularly reach for these devices regardless of location.**

“It’s for entertainment”
68% of tablet respondents

- **Users report clear use cases and preferences for each device type.**
 - Usage is wide-reaching and runs the gamut across location (activity) and time.
 - “I never leave without it” – also reported by 25% of tablet owners
 - “It’s for entertainment” - also reported by nearly half (48%) of smartphone users

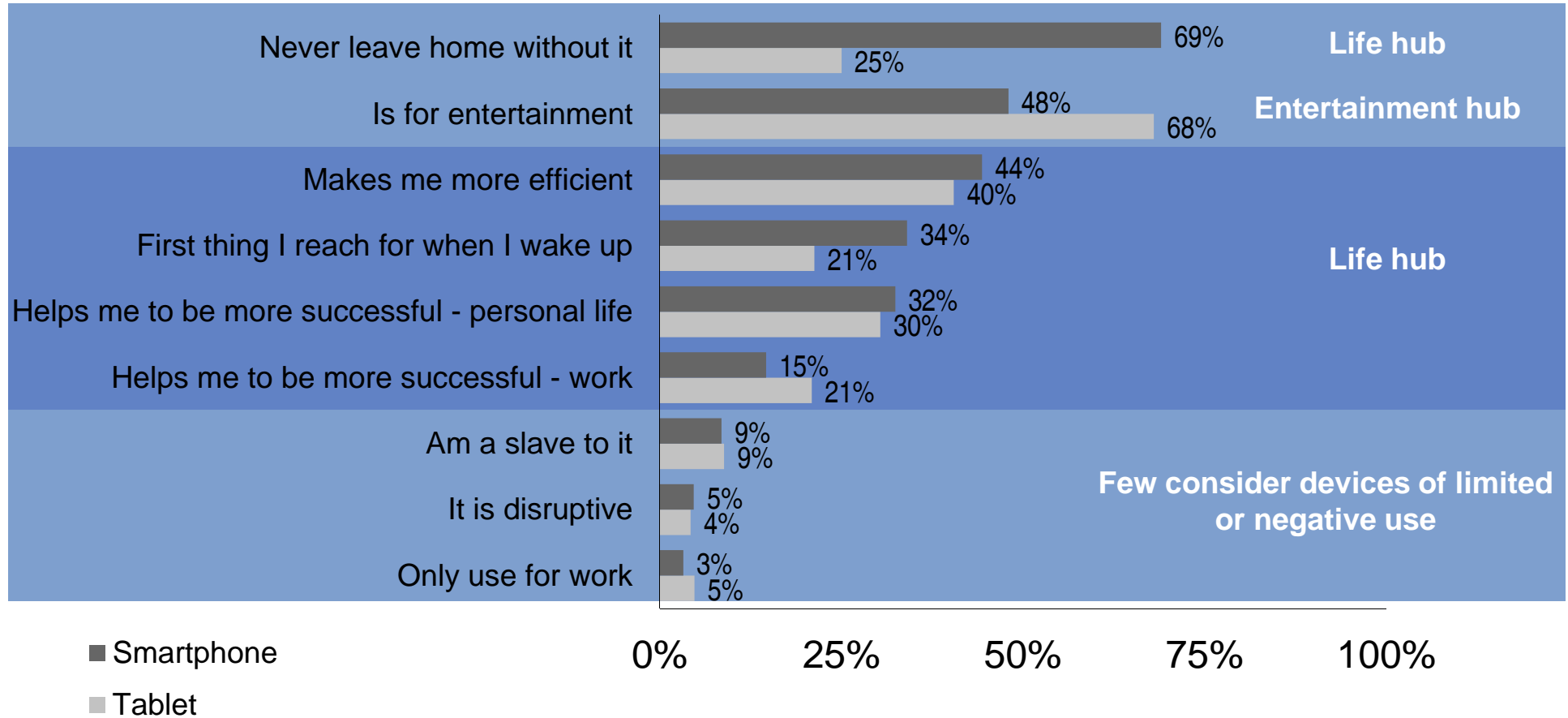
Scottsdale

New York

London

Singapore

Attitudes on Mobile Device Types



Percentage of Mobile Data Service Users by Device Type

Question: Which, if any, of the following statements apply to you? (please select all that apply)

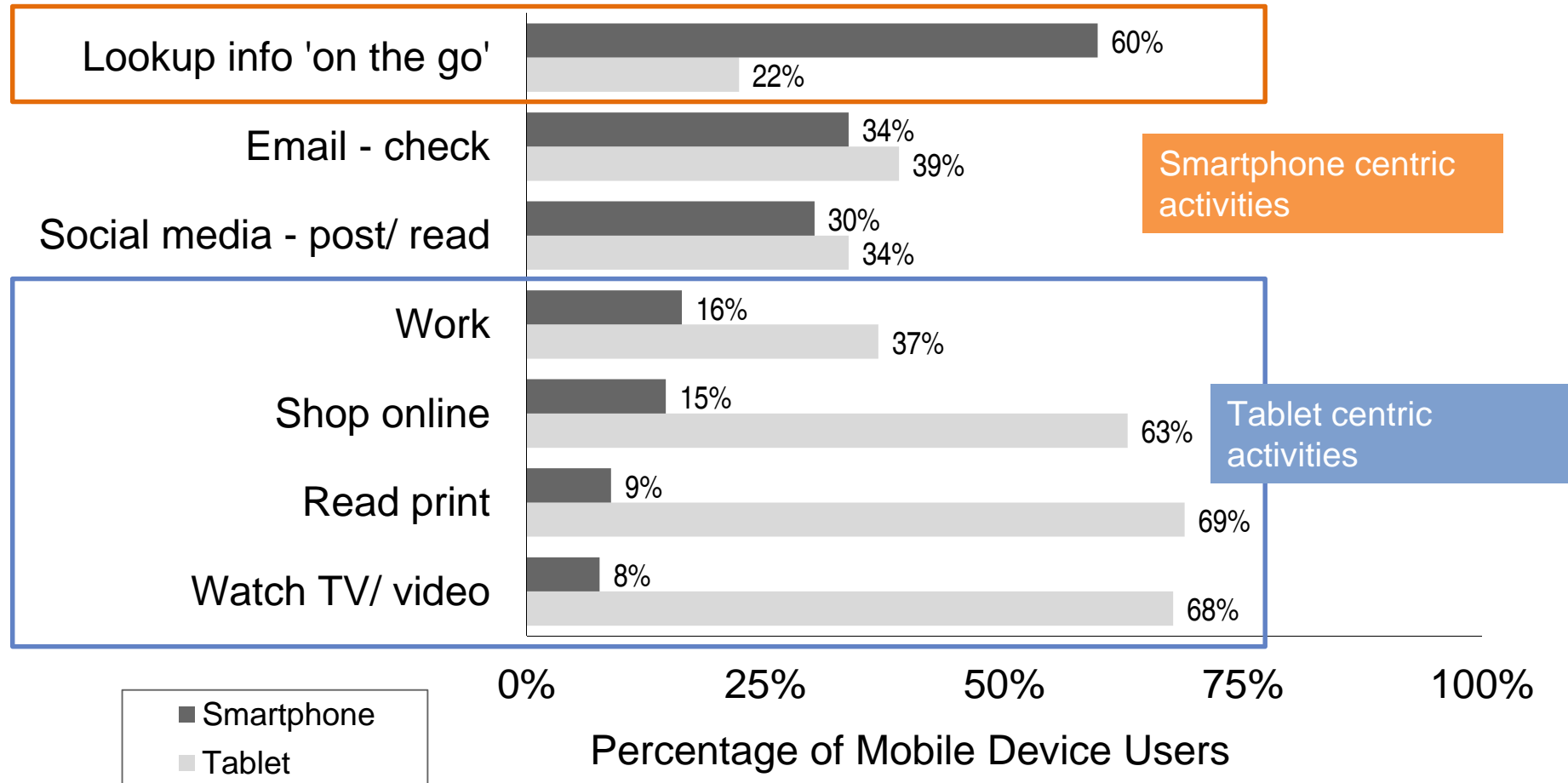
Scottsdale

New York

London

Singapore

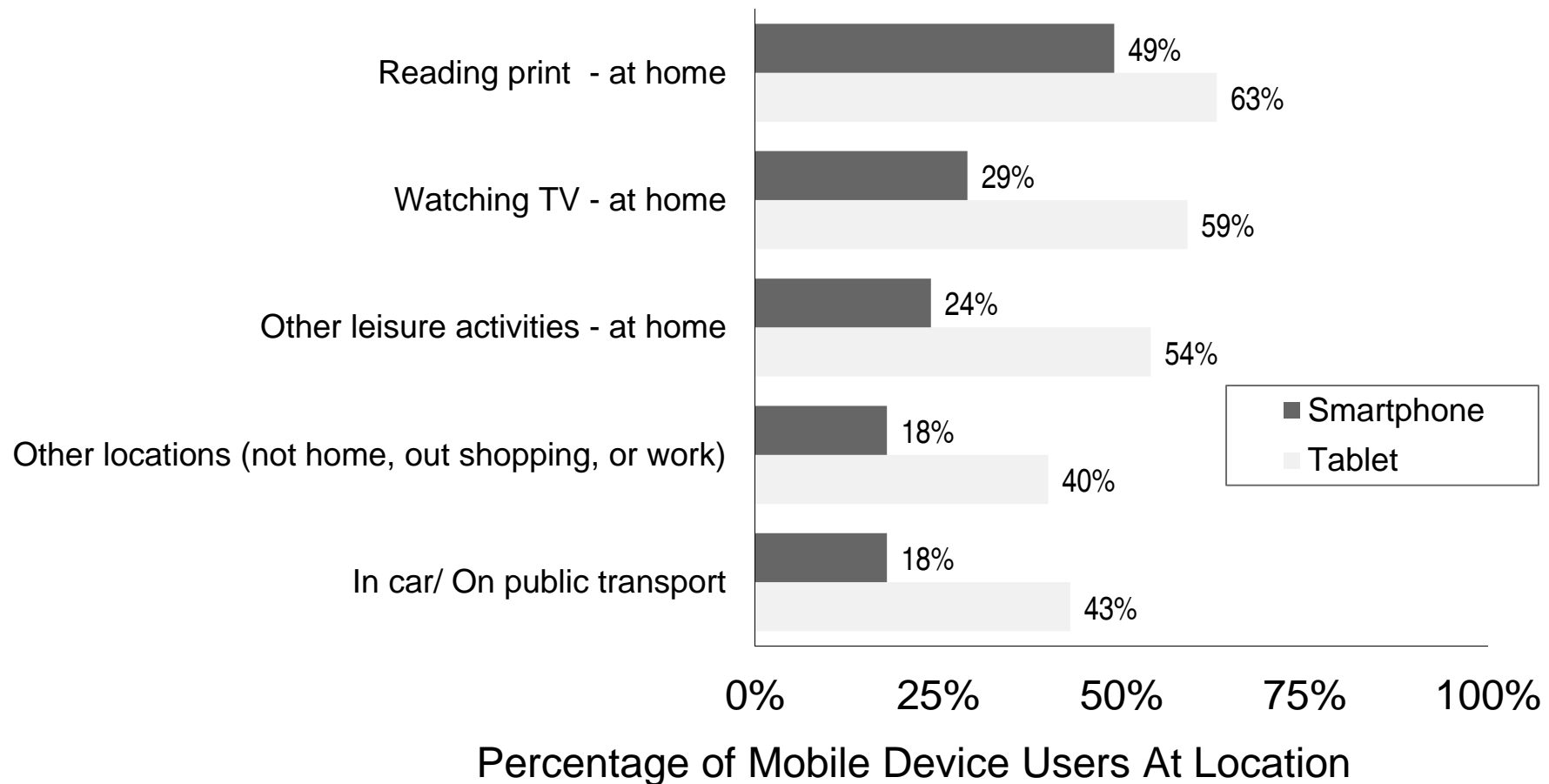
Device Preference for Activity



Question: Which device do you prefer to use to do [activity]?

“Out Shopping” Use*
 Smartphone: 56%
 Tablet: 28%

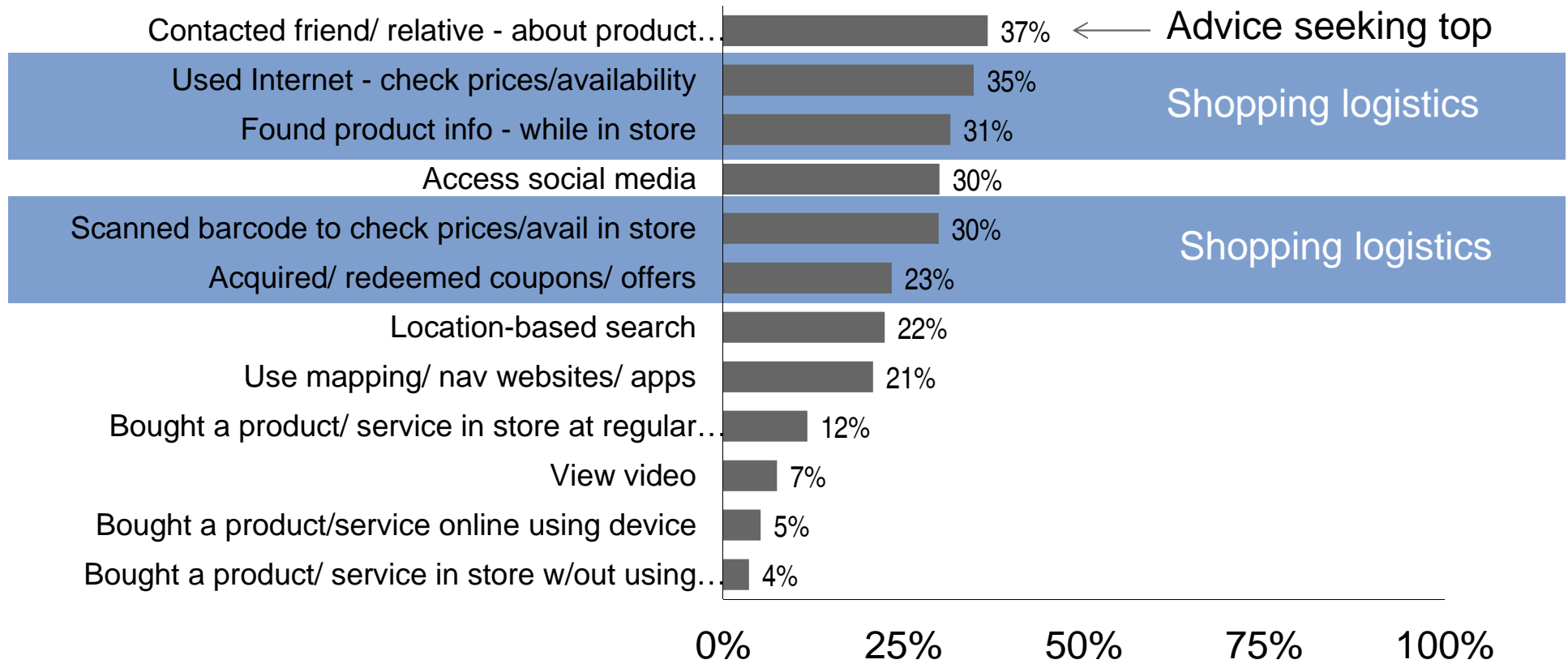
Shopping Activity Enabled by Device



Question: Which of the following have you done [in location/ situation]? Data represents shopping activity.

*Out shopping represents percentage of mobile device users

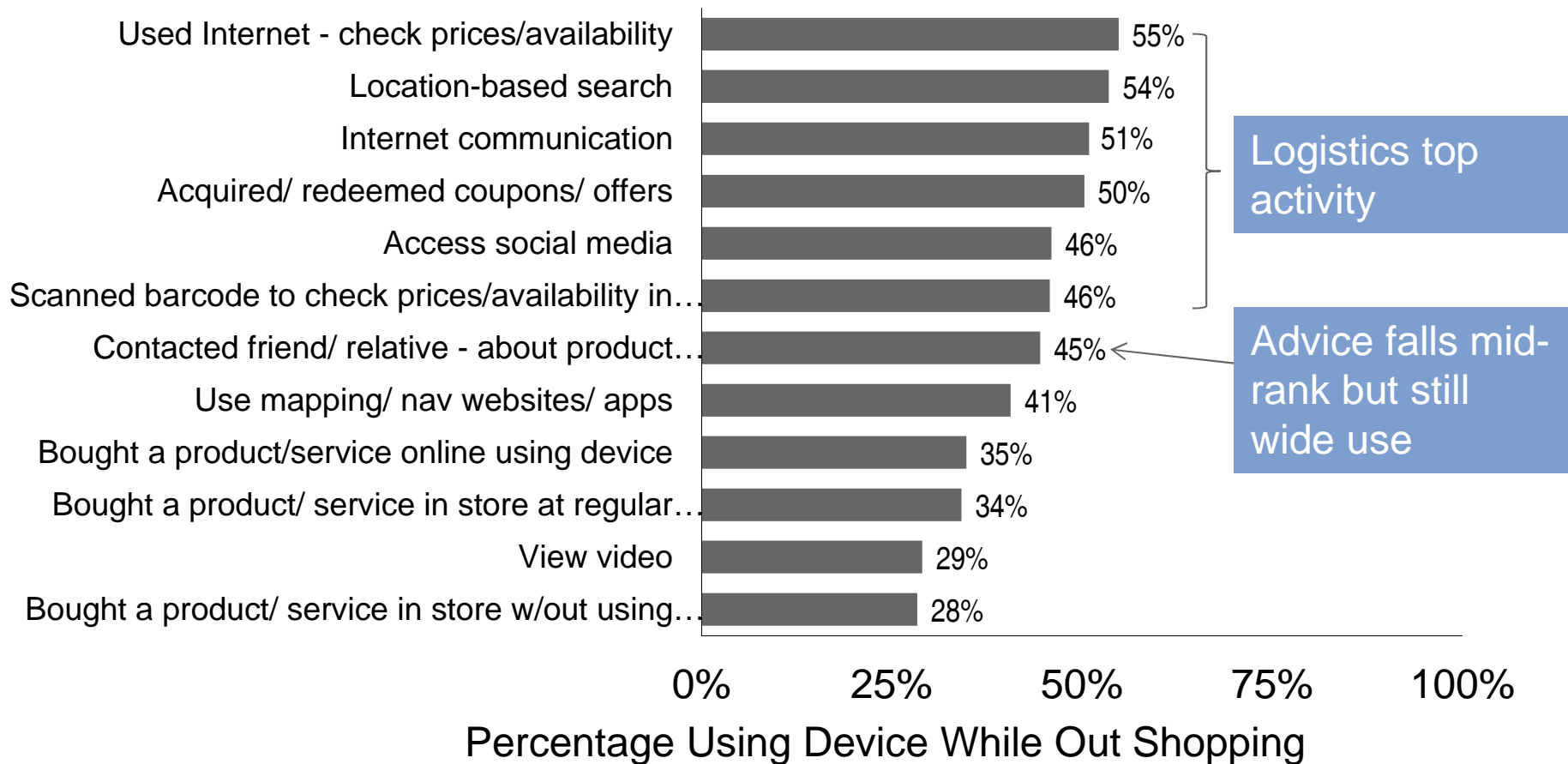
Use of Smartphone While Out Shopping



Percentage Using Device While Out Shopping

Question: Which of the following activities have you done with your smartphone while you are shopping in the last 3 months? (please select all that apply)

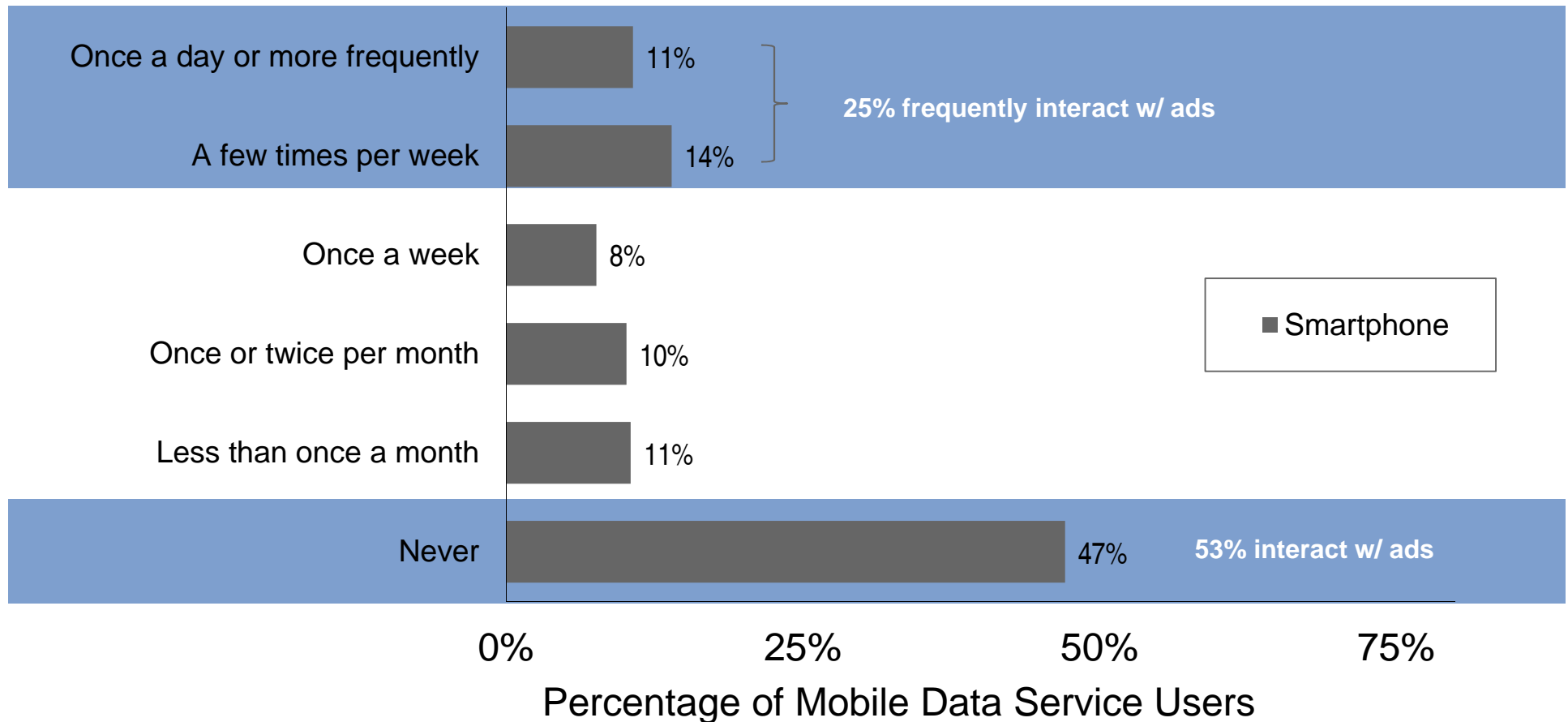
Use of Tablet While 'Out Shopping'



Question: Which of the following activities have you done with your tablet while you are shopping in the last 3 months? (please select all that apply)

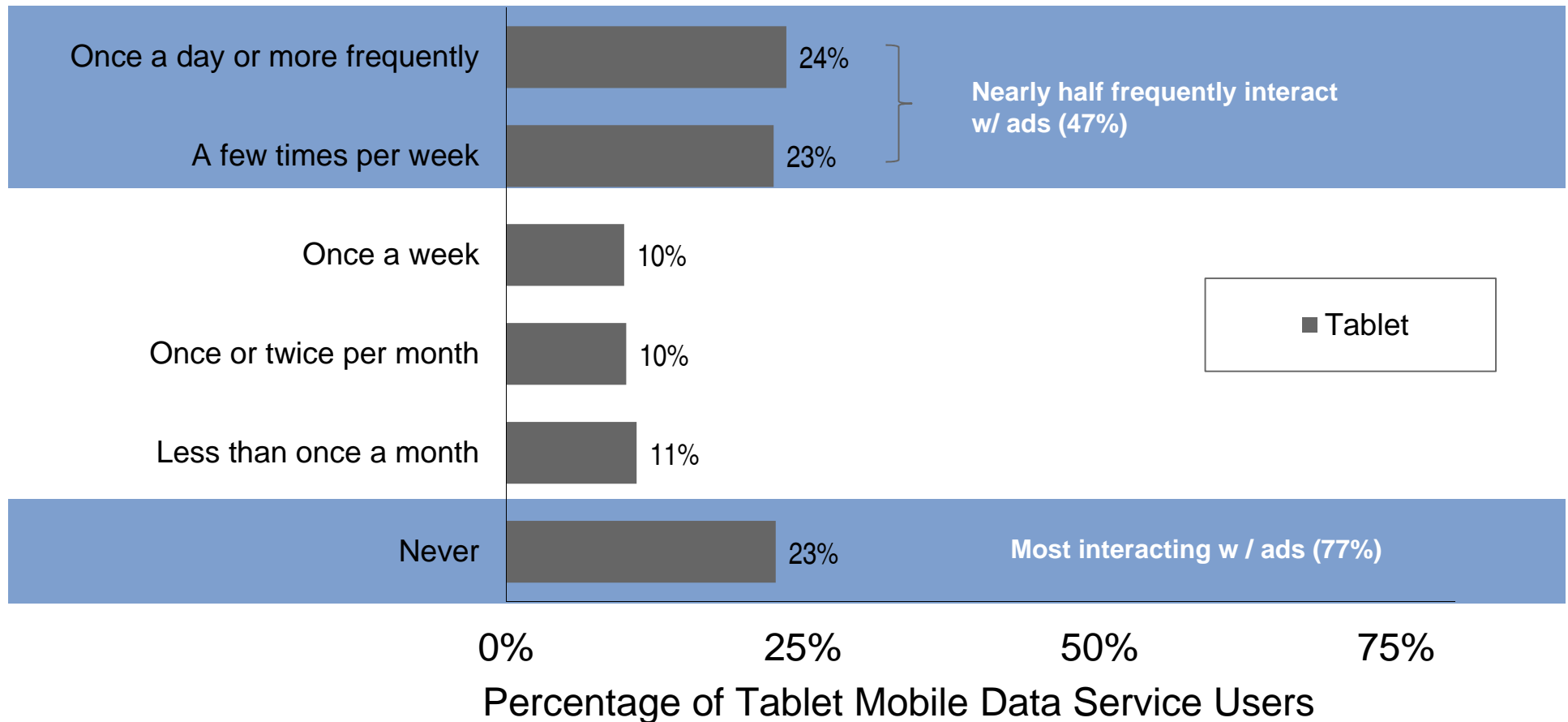
RECEPTIVITY, INTEREST AND ACTION TOWARDS ADVERTISING – ACROSS KEY USAGE AND IMPACT SCENARIOS

Frequency of Mobile Ad Interaction on Smartphone



Question: In the past 3 months, how often would you say you typically interact with, tap, view, get more information or respond to an advertisement you see on your [device]? (select one)

Frequency of Mobile Ad Interaction on Tablet



Question: In the past 3 months, how often would you say you typically interact with, tap, view, get more information or respond to an advertisement you see on your [device]? (select one)

Contextual Relevance Driving Interest In Ads

| | Smartphone | Tablet |
|-----------------------------------|------------|----------|
| Coupons related to shopping items | 1 | 2 |
| Something shopping for | 2 | 1 |
| Favorite brands | 3 | 3 |
| Location | 4 | 7 |
| Sites visited / apps used | 5 | 5 |
| Fun | 6 | 4 |
| Daily routine | 7 | 6 |
| Recent purchases | 8 | 8 |
| Info given to ad | 9 | 10 |
| Recent TV/ radio activity | 10 | 9 |
| Demos | 11 | 11 |
| Info shared publicly | 12 | 12 |

Contextually relevant top

Location important – 'on the go'

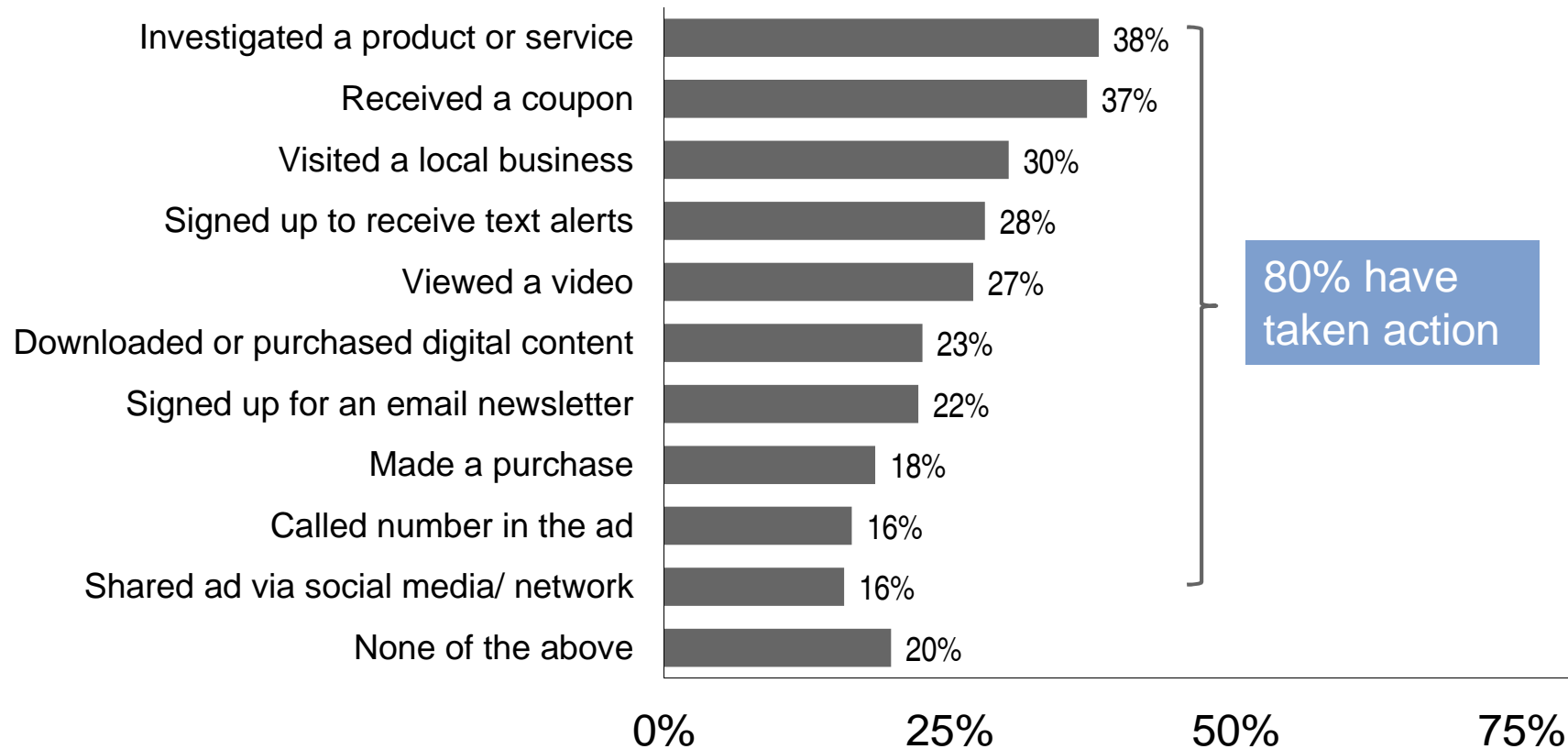
Allegiances valued

Least receptive – specific action or personal info

Question: What kinds of ads are you most likely to respond to on your [device]? (please select all that apply)

Ranking 1-12 with 1 representing most device users to respond to ad type; 12 least number of device users that respond to ads

Action Taken After Ad Interaction

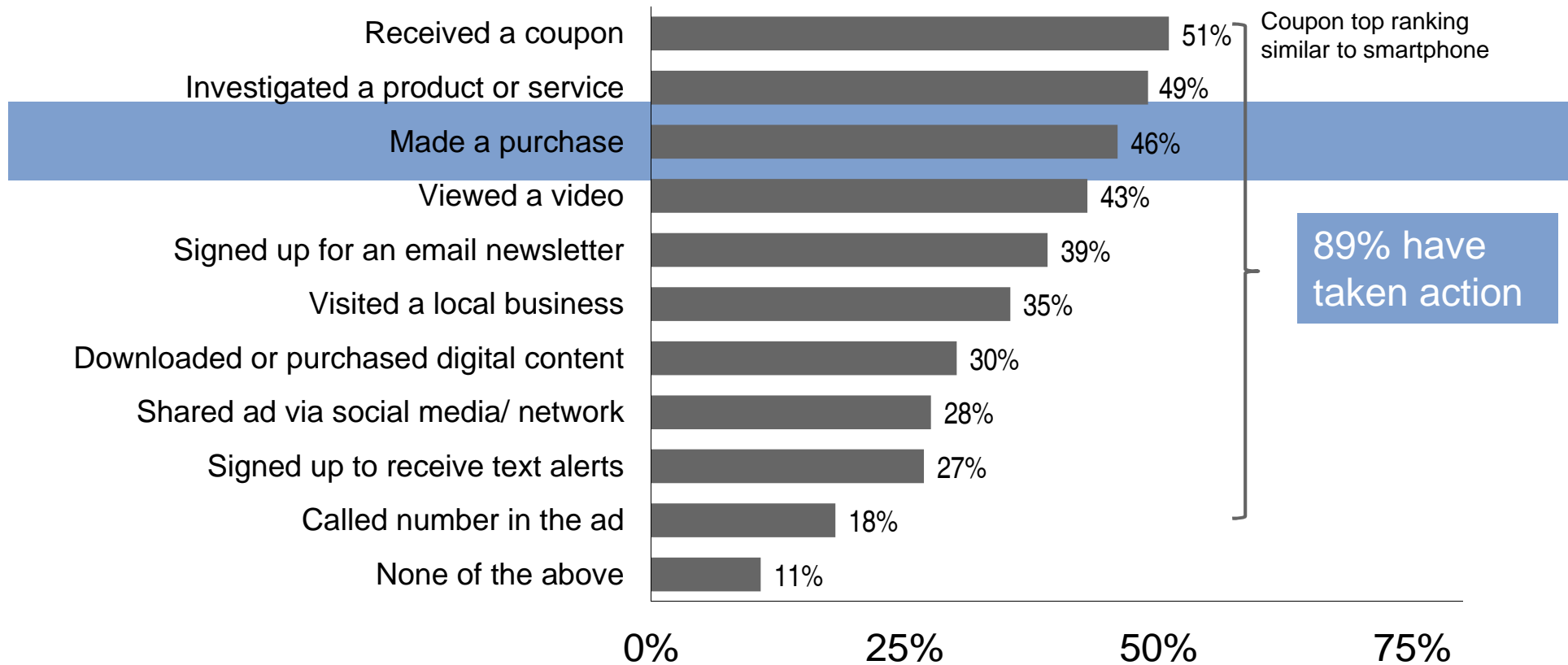


Percentage of Mobile Data Users That Interact w/ Ads on Device

Question: Which, if any, of the following have you done as a result of viewing or clicking on an ad on your smartphone? (please select all that apply)

“Purchase” Ranks in Top 3 Action Items After Tablet Ad Interaction

Action Taken After Ad Interaction



Percentage of Mobile Data Users That Interact w/ Ads on Device

Question: Which, if any, of the following have you done as a result of viewing or clicking on an ad on your tablet? (please select all that apply)

Ranking of Ad Receptiveness By Device Type & Location

| | Smartphone | Tablet |
|--------------------------------------|------------|--------|
| At home – leisure time | 1 | 1 |
| On public transport | 2 | 2 |
| At home – doing chores | 3 | 4 |
| While out shopping | 4 | 3 |
| Working at home (e.g. telecommuting) | 5 | 8 |
| At work – outside home | 6 | 7 |
| Other locations – outside home | 7 | 5 |
| In car | 8 | 6 |

Most receptive
- captive and relaxed

Least receptive -
distracted/
stressed

Question: How likely are you to tap, interact with, view, get more information or respond to an advertisement you see on your [device] in the following situations:: [activity]

Represents those indicating ‘very likely’;
Ranking 1-8 with 1 representing most likely to respond in situation; 8 least likely

WHAT DOES THIS MEAN FOR MEMBERS OF THE ADVERTISING AND MARKETING ECOSYSTEM?

Consumers enter brand dialogue using preferred form of communications:

- Receive SMS/MMS messaging
- Sign up for email
- Scan a QR code
- Visit a website URL
- Vote / take a survey

No one-size-fits-all method.

Mobile devices enable an immediate call-to-action.



Photo: Stig Nygaard

GUINNESS QR CUP

A first of it's kind, product-activated QR code.

- When special glass filled with Guinness beer, a scannable QR Code reveals.
- If the glass was filled with something else, not readable.
- Multiple interactions with user – social media, offers, and permission-driven awareness to “friends”



When the pint glass is empty, the QR code is unreadable.



When the pint glass is filled with ordinary beer, the QR code is unreadable.



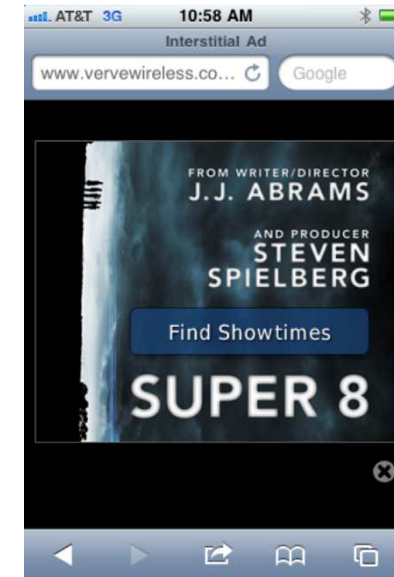
When the pint glass is filled with Guinness, the black liquid completes the code and turns the glass, (and the drink itself!) into a dynamic content & social media experience.



BBD0, May 2012

How a simple ad leads to multiple user engagements:

- Click to view a movie trailer
- Read reviews and recommendations
- Find showtimes and purchase tickets (even pre-assigned seats)
- Invite friends and family to join you (social media)
- Pre-order popcorn, candy and soda
- Scan a digital ticket on device



Drive relational and hyper-local messages:

- At a mobile Weather website, for example, the user is looking for this weekend's forecast in a specific ZIP code.
 - Drive a local ad for tee times at the golf course (press to select a time now)
 - It looks like a good weekend for that DIY project (present a video interstitial for the home improvement store with a "click to speak to an expert" link to call the local store)

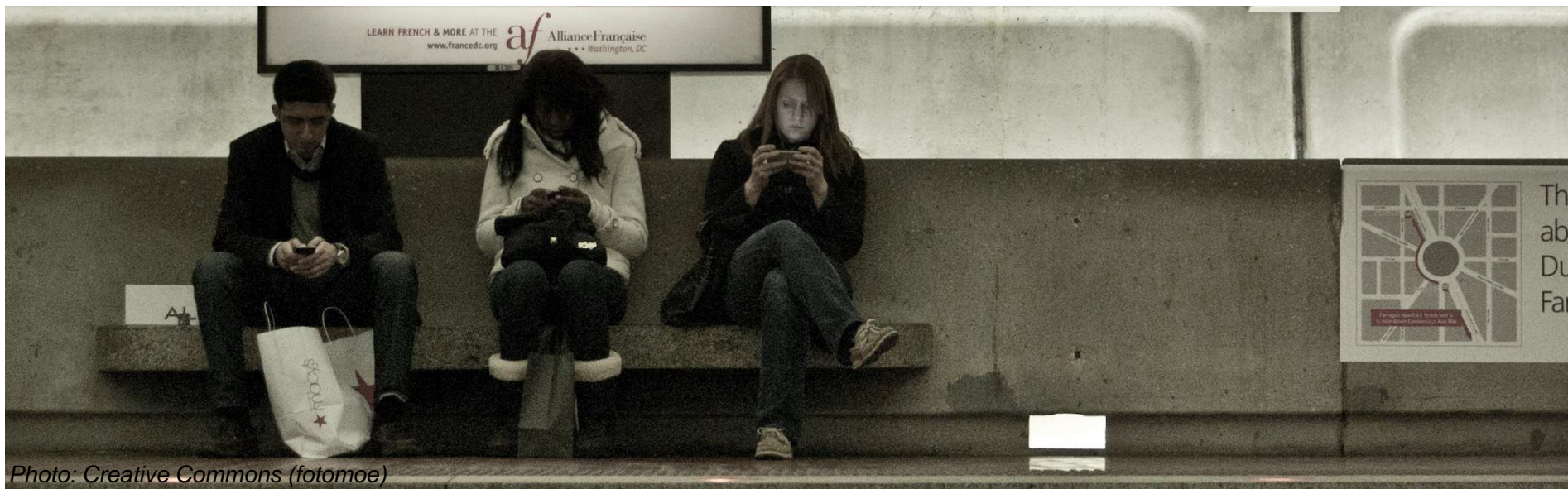


Photo: Creative Commons (fotomoe)

Scottsdale

New York

London

Singapore

Augmented reality

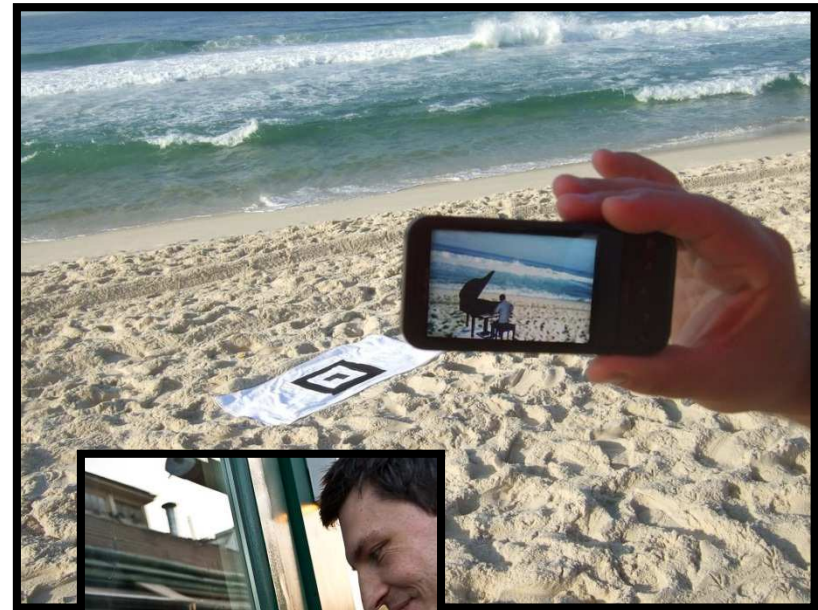
- “Try” before you buy
 - Shoe or sunglasses shopping
 - Cosmetics selection
- Audio matching
 - TV bonus content
- Opportunity to pair mobile campaigns with other media formats

Near-Field Communications (NFC)

- Identification
- Payment

Device Sensors

- Aware of device position
- Alert the device to proximity of offer
- Enables geo-fenced rules



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SUPPLEMENTAL TABLES, CHARTS AND ANALYSIS

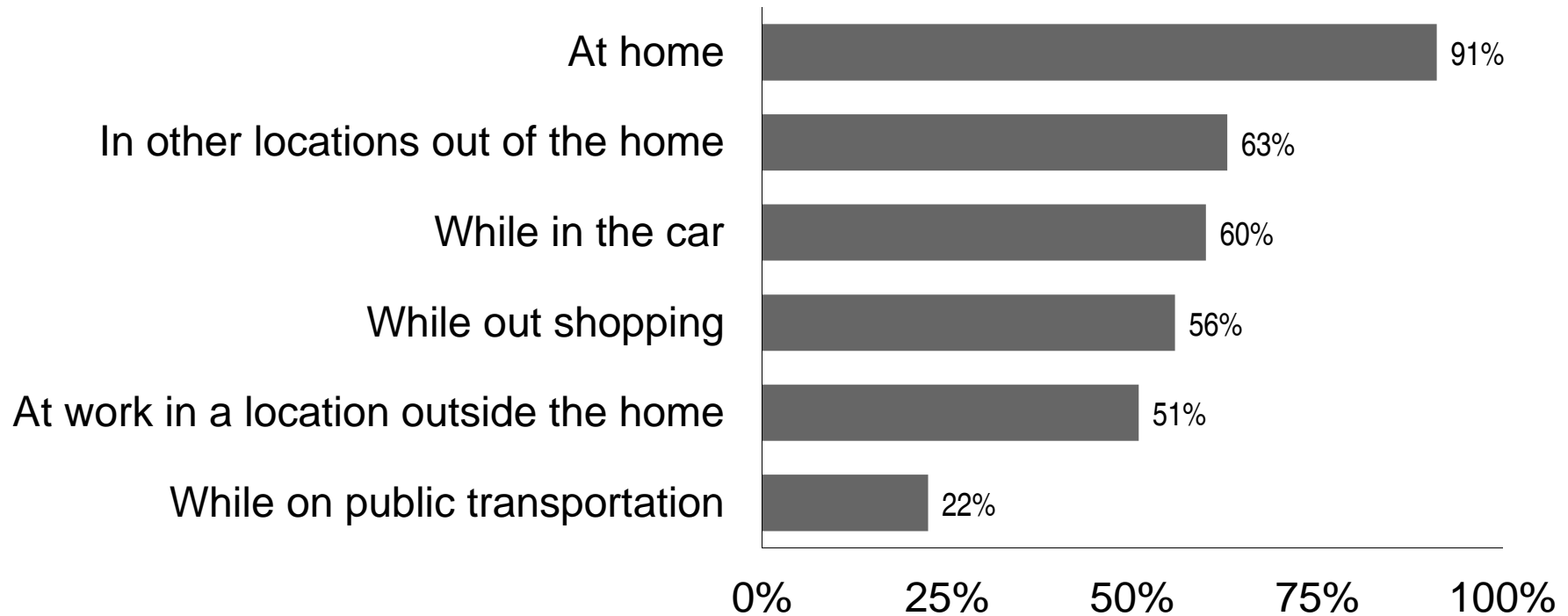
Mobile Device Usage - Locations

SUPPLEMENTAL

- **Mobile does not mean ‘remote’.** There is an opportunity to reach nearly all device users ‘in-home’.
 - At home use is reported by 91% of smartphone and 97% of tablet users.
- **In home captures two of the top three locations where users are most receptive – during leisure time (#1) and doing chores (#3).**
- **Rounding out the top 3, public transport representing a smaller – but highly engaged captive audience.**
- **Areas with potential for distraction and stress are where users tend to be most unreceptive to advertising and opportunity – at work, working from home, and in the car.**

Ironically - Smartphones Most Widely Used 'At Home'

Locations Using Smartphone

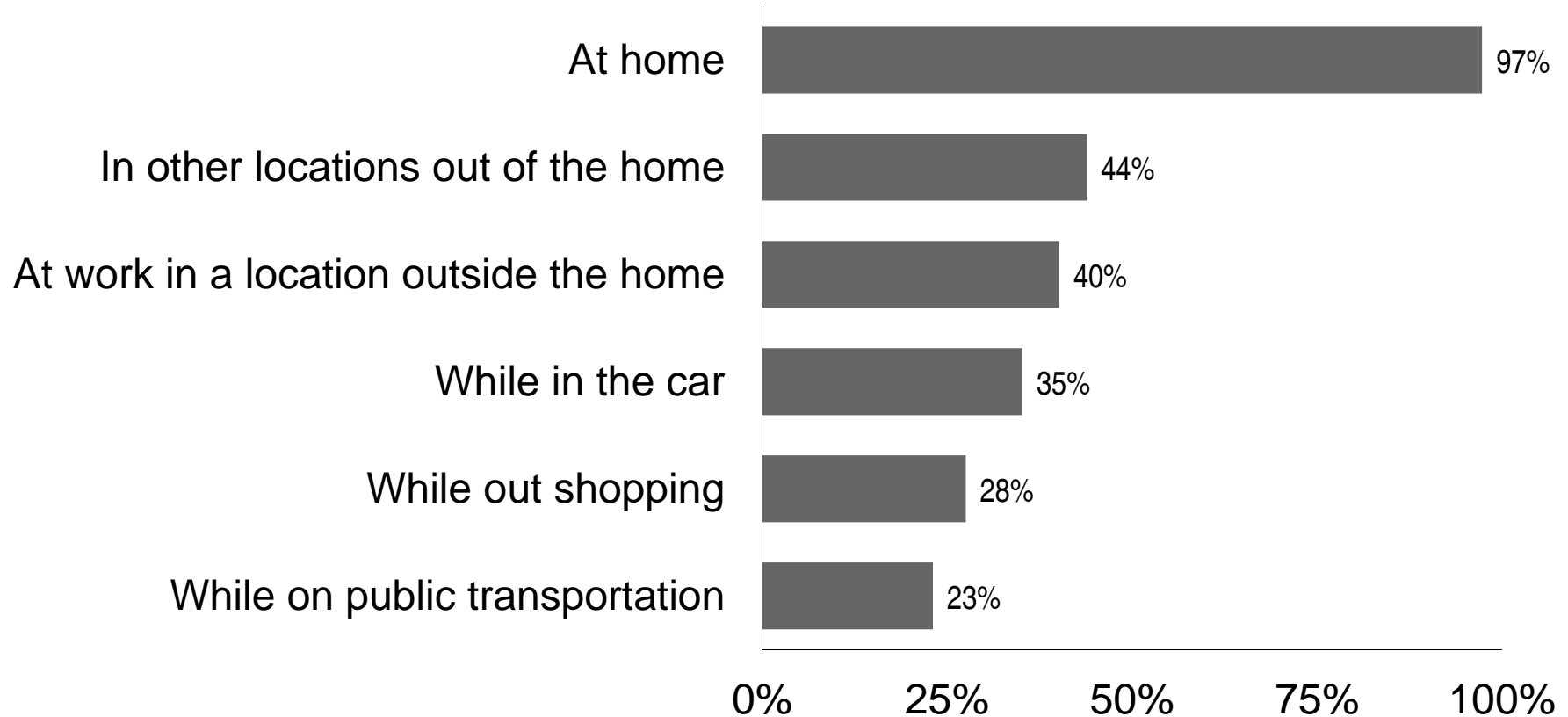


Percentage of Smartphone Mobile Data Service Users

Question: In this survey, we will be asking you about using your [device] to access "mobile data services". By this, we mean services that enable you to use your tablet to browse the Internet, shop, search for information, read digital content (e.g. newspapers, social networks/media), use mobile apps, etc. Where have you used your [device]? (Select all that apply)

Tablet Activity Centered At Home

Locations Using Tablet



Percentage of Tablet Mobile Data Service Users

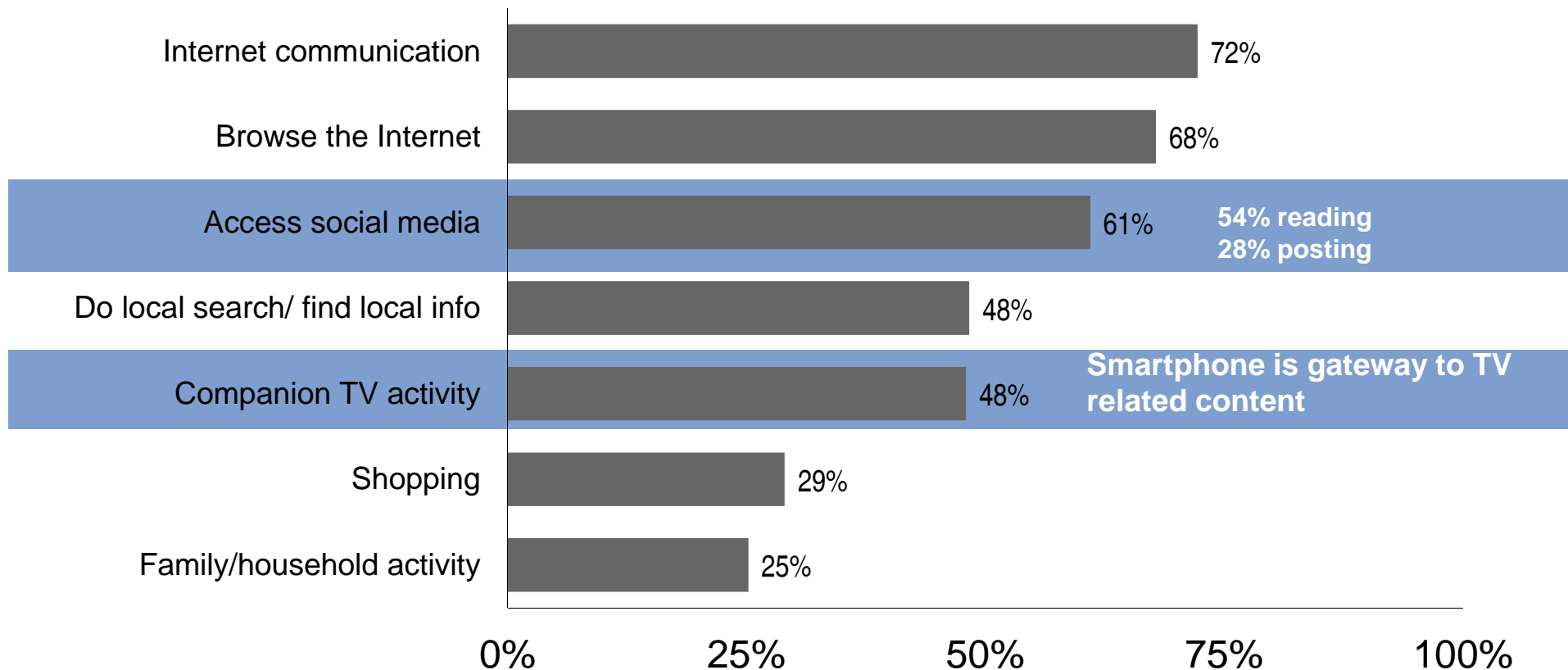
Question: In this survey, we will be asking you about using your tablet to access "mobile data services". By this, we mean services that enable you to use your tablet to browse the Internet, shop, search for information, read digital content (e.g. newspapers, social networks/media), use mobile apps, etc. Where have you used your smartphone? (Select all that apply)

Consumers & the Digital Day

SUPPLEMENTAL

- **Users are connecting digitally throughout the day. Media consumption follows a pattern regardless of device type.**
- **Time/ day part provides window into consumer habits.**
- **High frequency of use times are represented by personal time – at ‘wake-up, ‘waiting’, ‘bedtime’, ‘TV time’, ‘after work’.**
- **While shopping and commuting show smaller frequency of use – this may be due to the ‘addressable market’:**
 - **Not always a daily activity:** unlike ‘waking up’, ‘shopping’ may only happen once a week or a few times per week.
 - **Limited audience:** similarly ‘commuting’ is not applicable to all as is ‘bedtime’

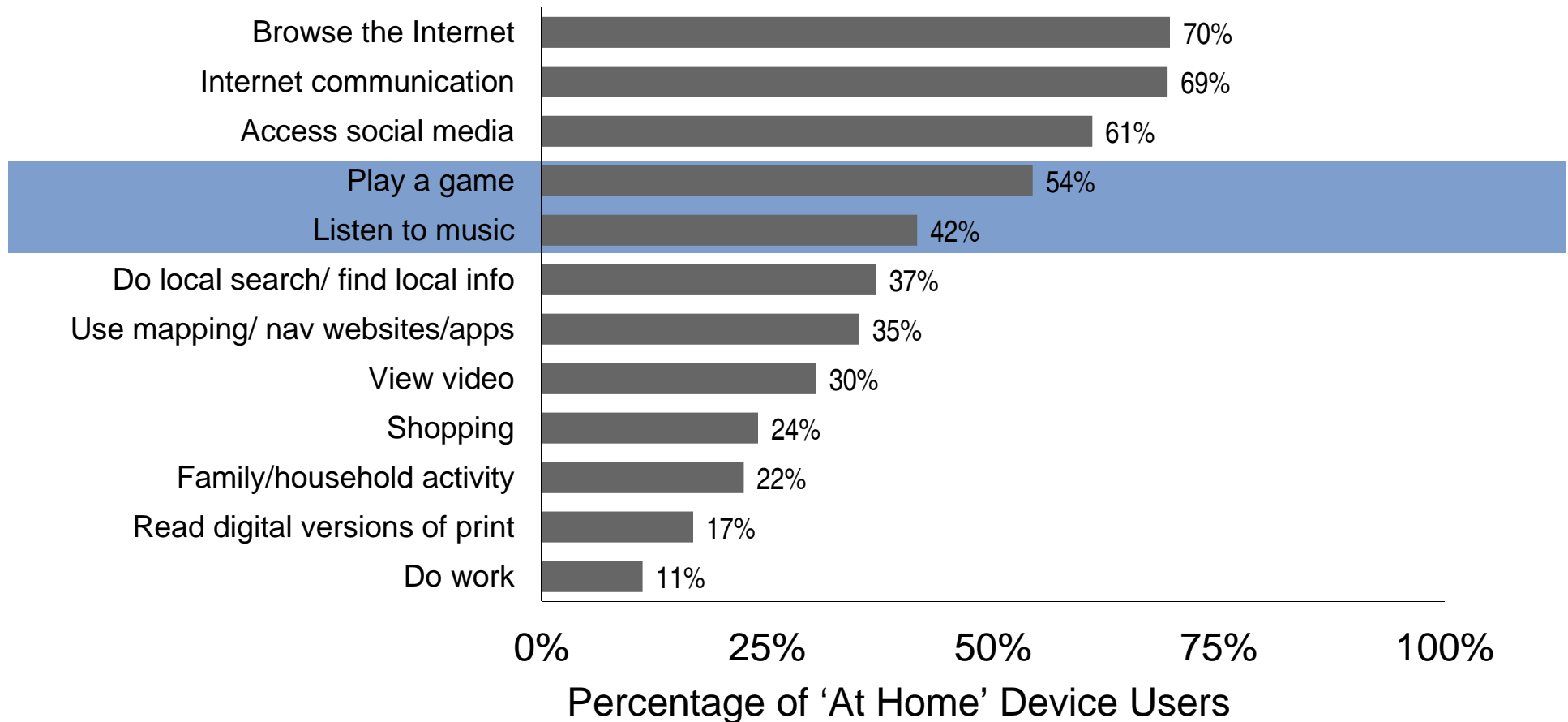
Use of Smartphone While Watching TV – at Home



Percentage of TV Watching Device Users

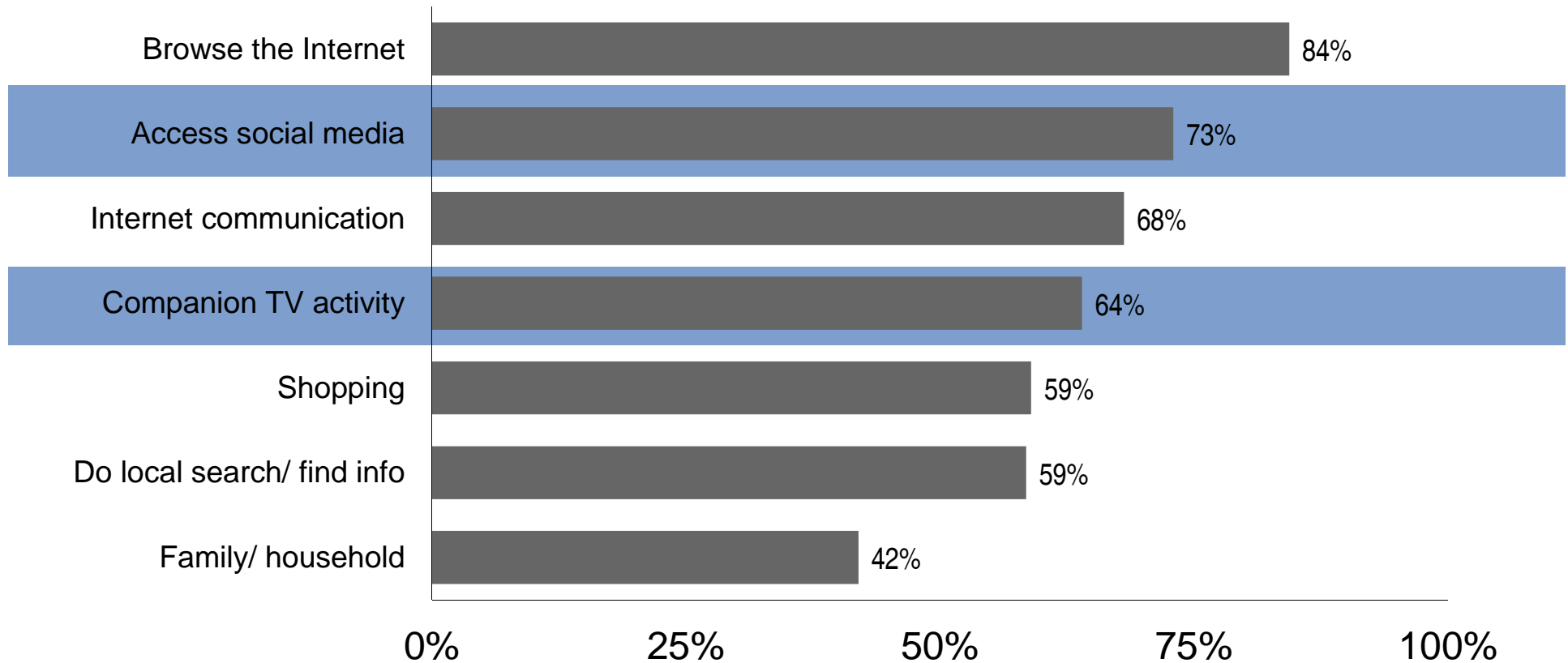
Question: Which of the following have you done on your smartphone while watching TV at home in the last 3 months? (please select all that apply)

Use of Smartphone During 'Other' Leisure Activities – at Home



Question: Which of the following have you done on your [device] while doing other leisure activities at home in the last 3 months? (please select all that apply)

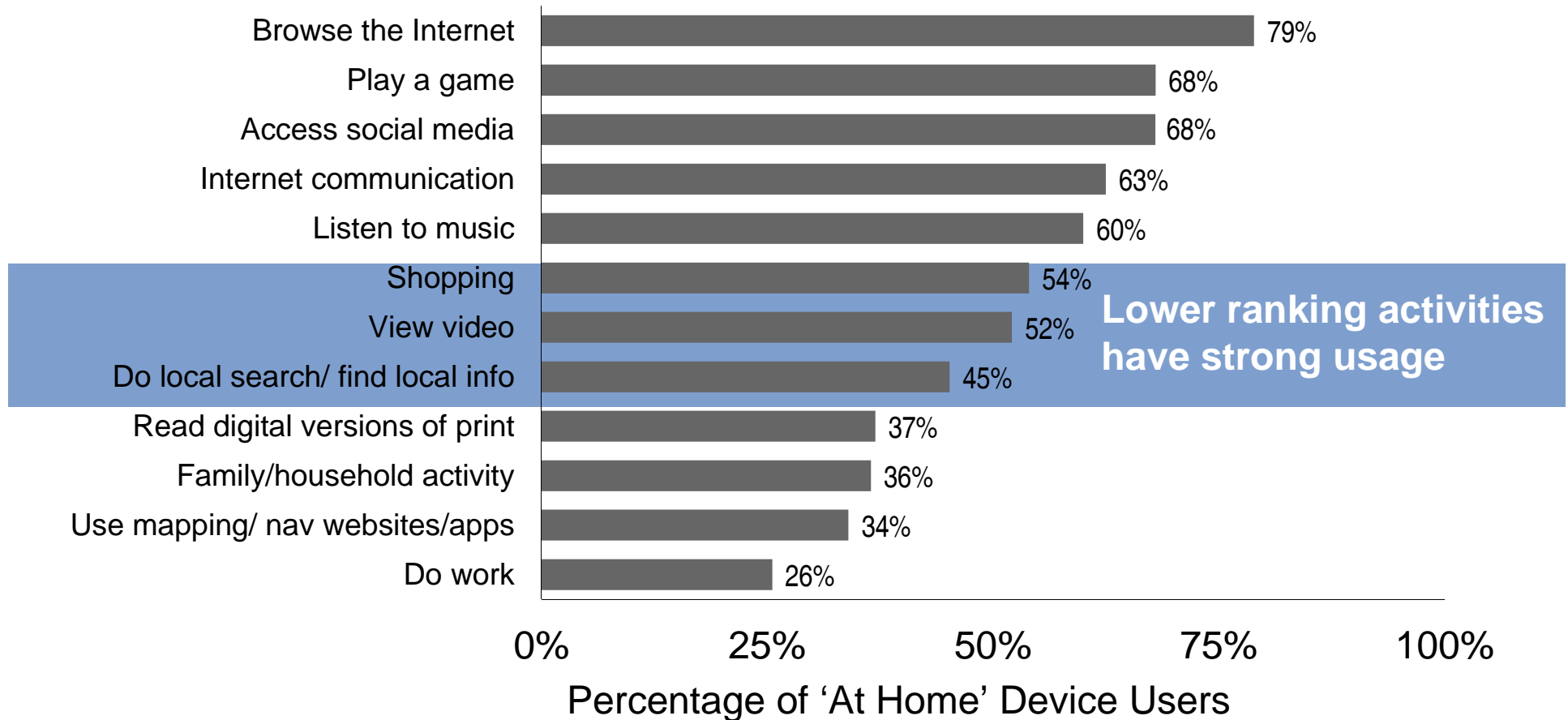
Use of Tablet While Watching TV – at Home



Percentage of TV Watching Device Users

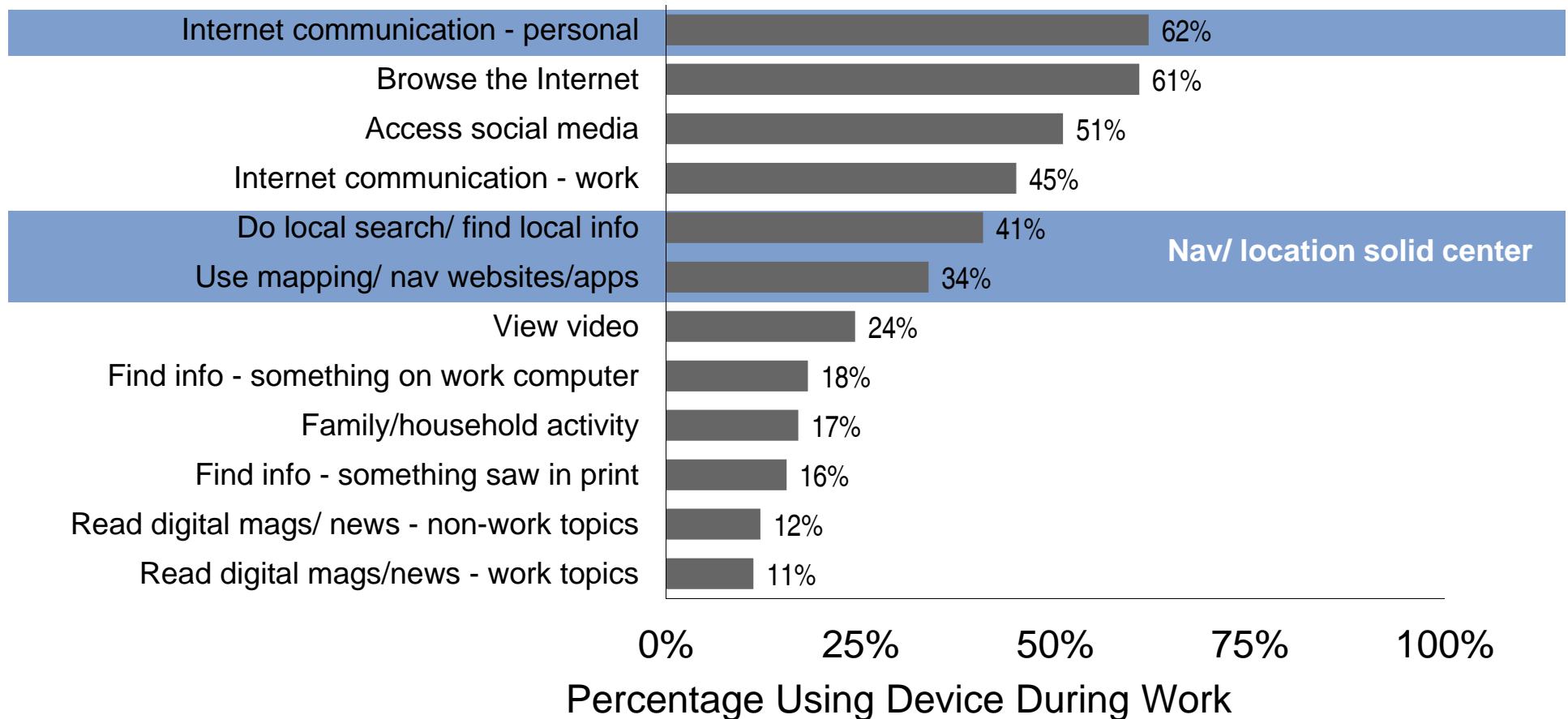
Question: Which of the following have you done on your tablet while watching TV at home in the last 3 months? (please select all that apply)

Use of Tablet During 'Other' Leisure Activities – at Home



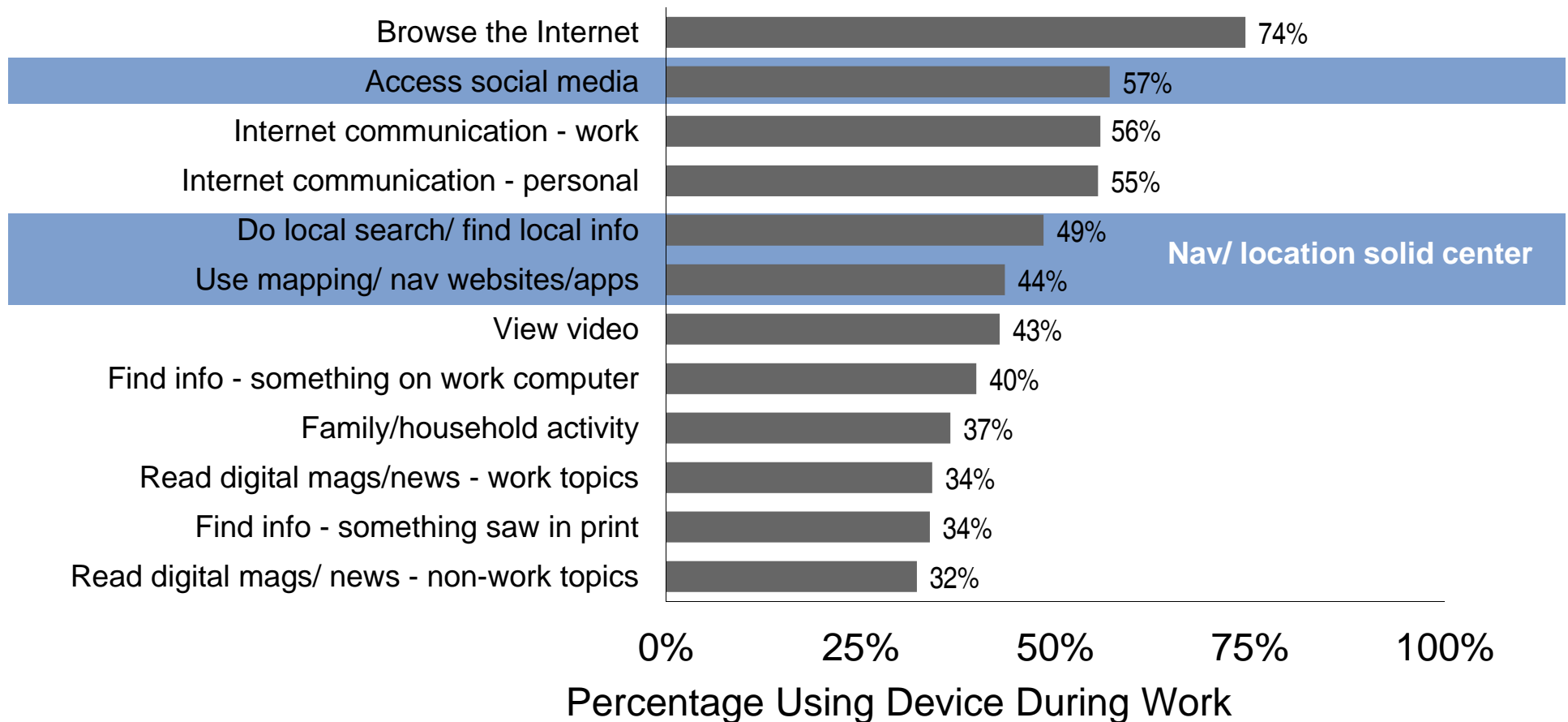
Question: Which of the following have you done on your [device] while doing other leisure activities at home in the last 3 months? (please select all that apply)

Use of Smartphone While At Work/ Working



Question: Which of the following activities have you done on your [device] while you are at work or working in the last 3 months? (please select all that apply)

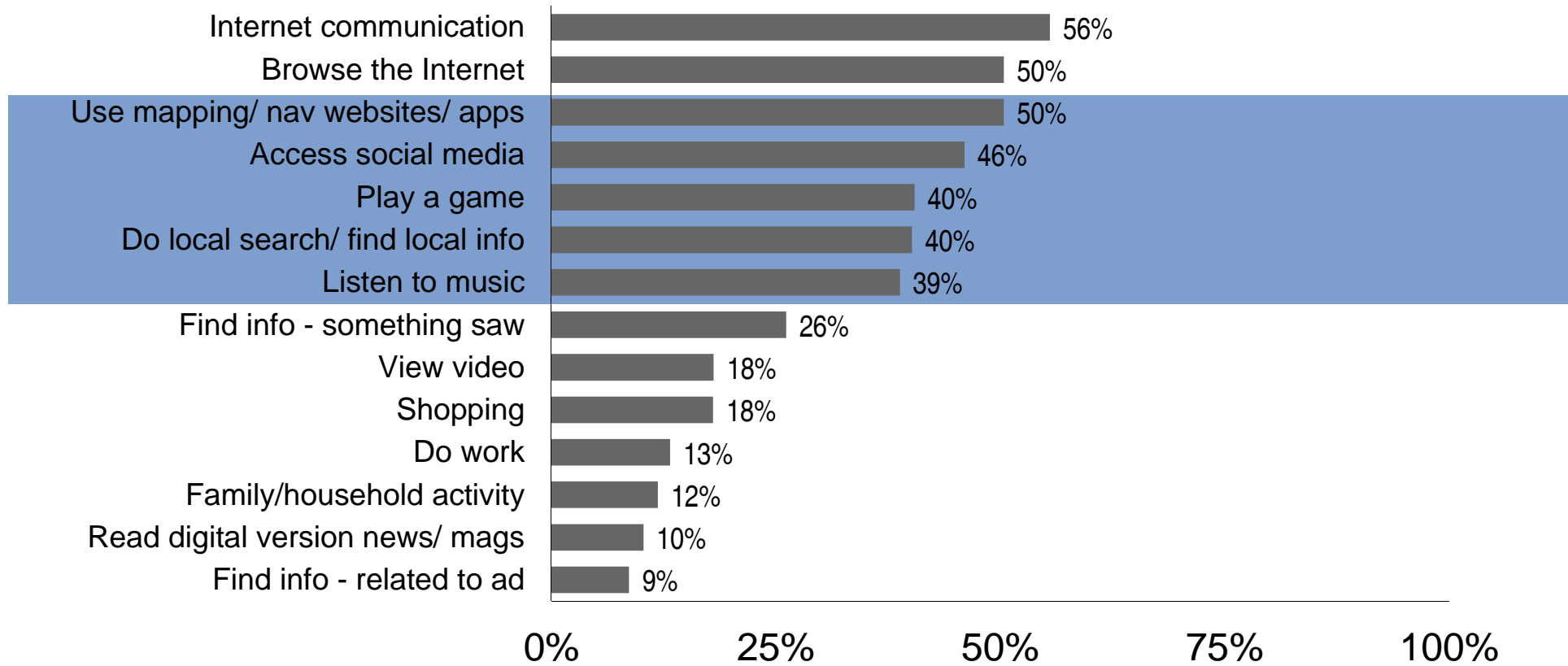
Use of Tablet While At Work/ Working



Nav/ location solid center

Question: Which of the following activities have you done on your [device] while you are at work or working in the last 3 months? (please select all that apply)

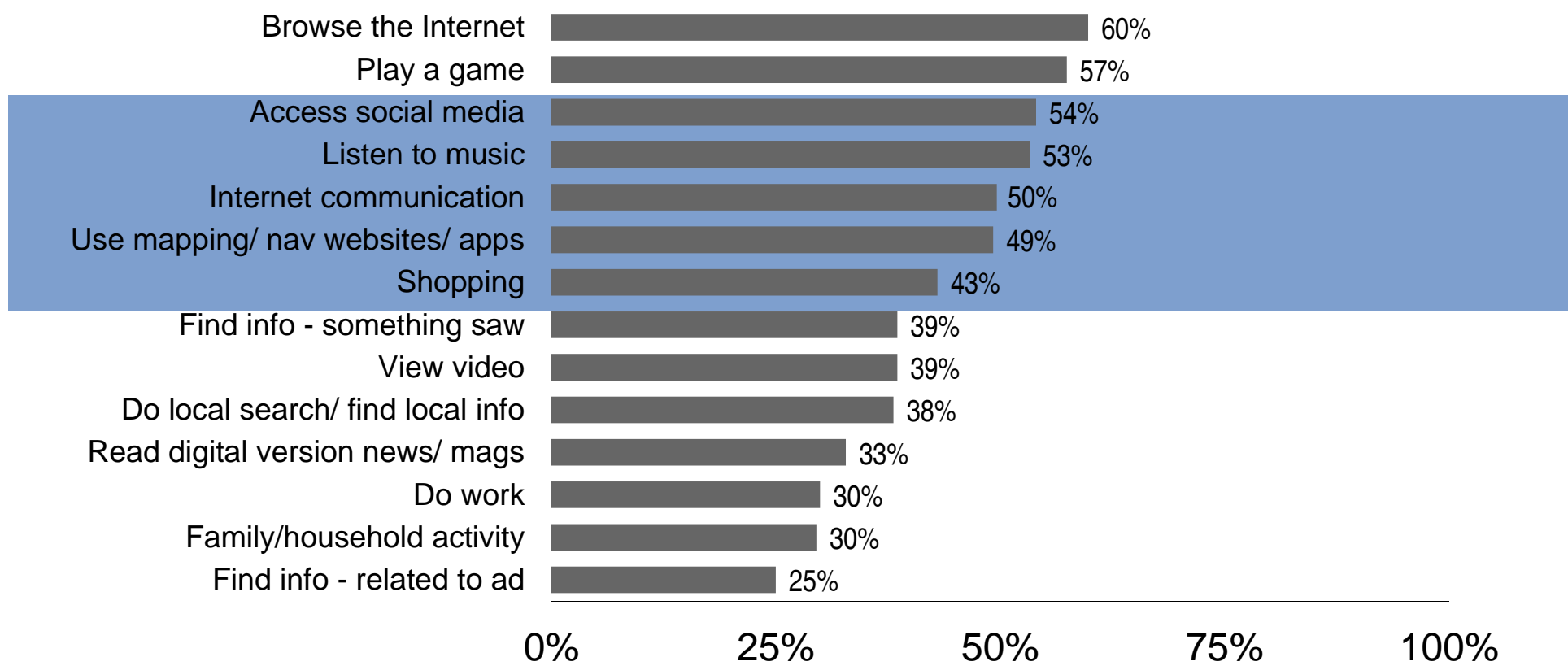
Use of Smartphone While Using Car/ Public Transportation



Percentage Using Device While Using Car/ Public Transport

Question: Which of the following activities have you done with your [device] while you are using public transportation and/or while in a car in the last 3 months? (please select all that apply)

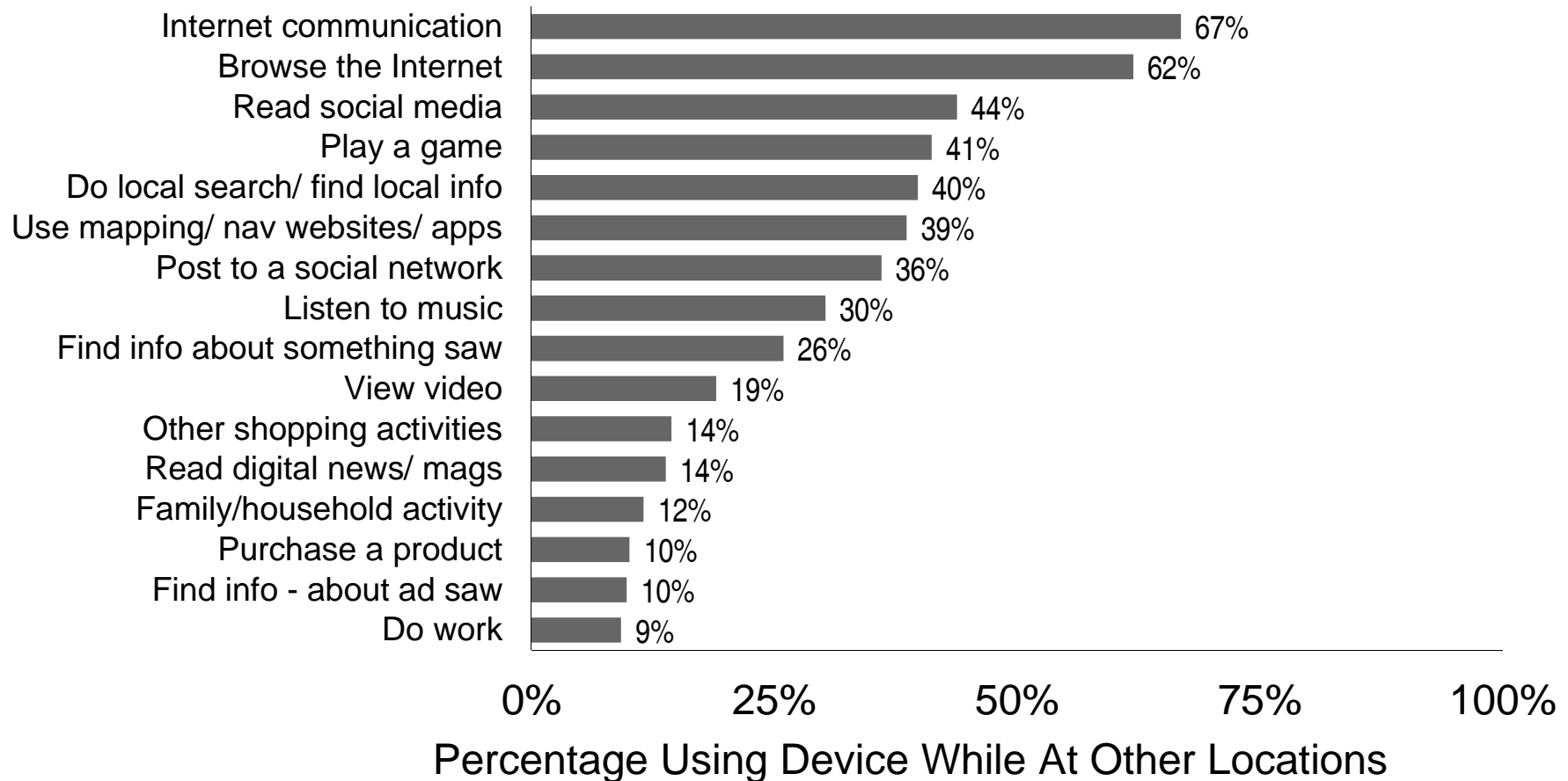
Use of Tablet While Using Car/ Public Transportation



Percentage Using Device While Using Car/ Public Transport

Question: Which of the following activities have you done with your [device] while you are using public transportation and/or while in a car in the last 3 months? (please select all that apply)

Use of Smartphone When At Other Locations – Outside the Home

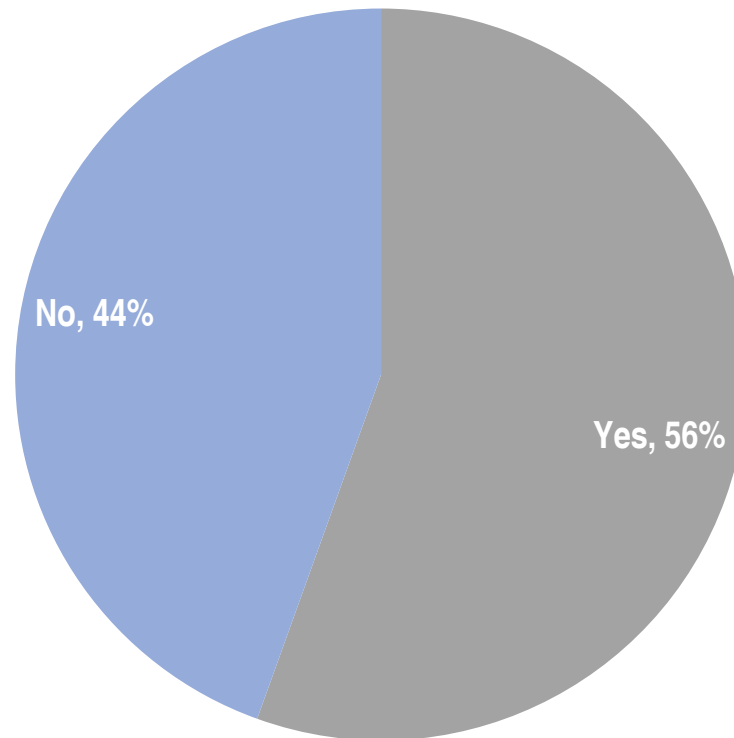


Question: Which of the following activities have you done with your smartphone when you are at other locations outside of the home (excluding public transportation, in the car, at a store or mall, or at work) in the last 3 months (e.g., restaurant, airport, park, etc.)? (please select all that apply)

Consumers' Simultaneous Use of Smartphone & Tablet

SUPPLEMENTAL

Use Devices Simultaneously



Over half use their devices simultaneously.

Percentage of Smartphone and Tablet Mobile Data Users

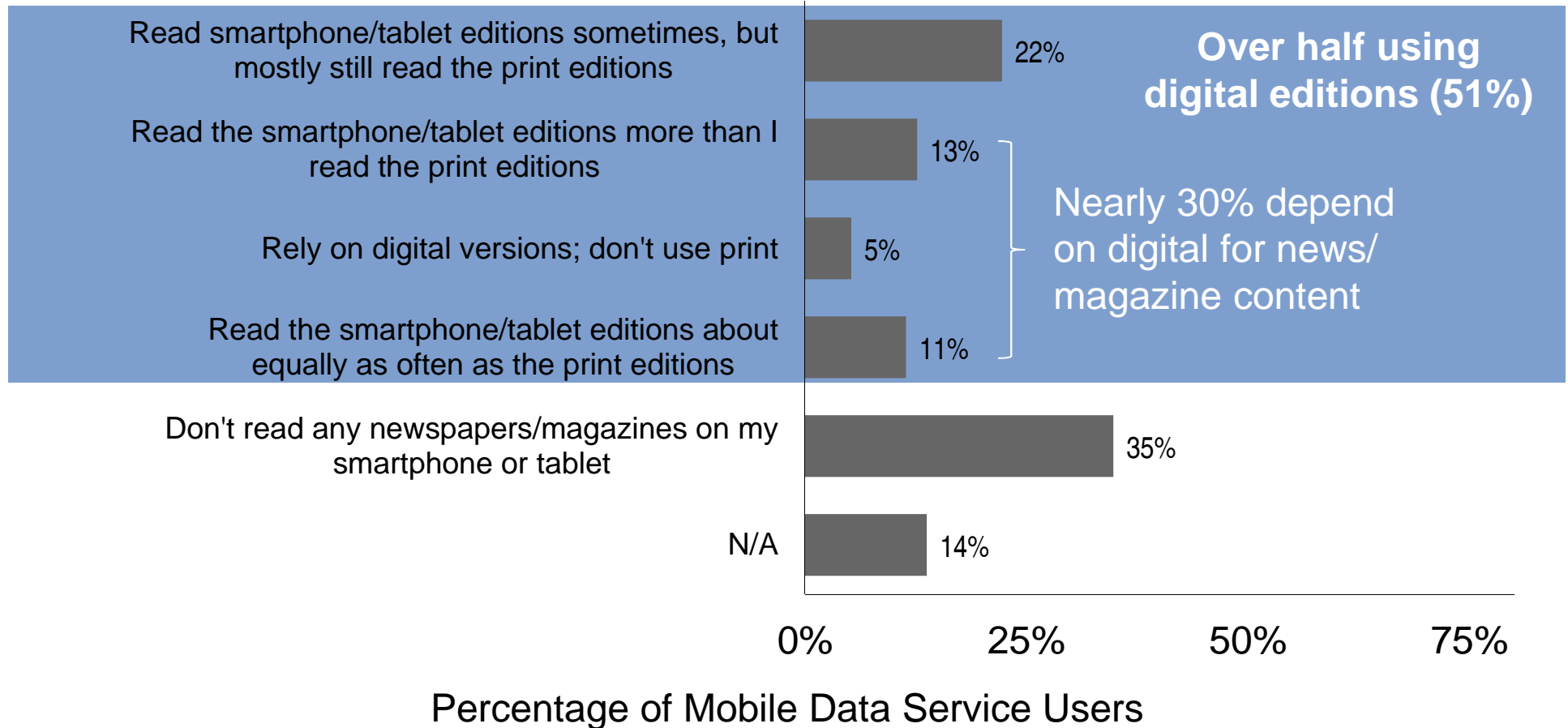
Question: You've indicated that you have both a smartphone and a tablet. Do you ever use the two devices simultaneously?

Usage of Digital Versions of Print Publications

SUPPLEMENTAL

Nearly 30% Depend on Digital Versions of Traditional Print Pubs

Usage of Digital Versions of Print Publications

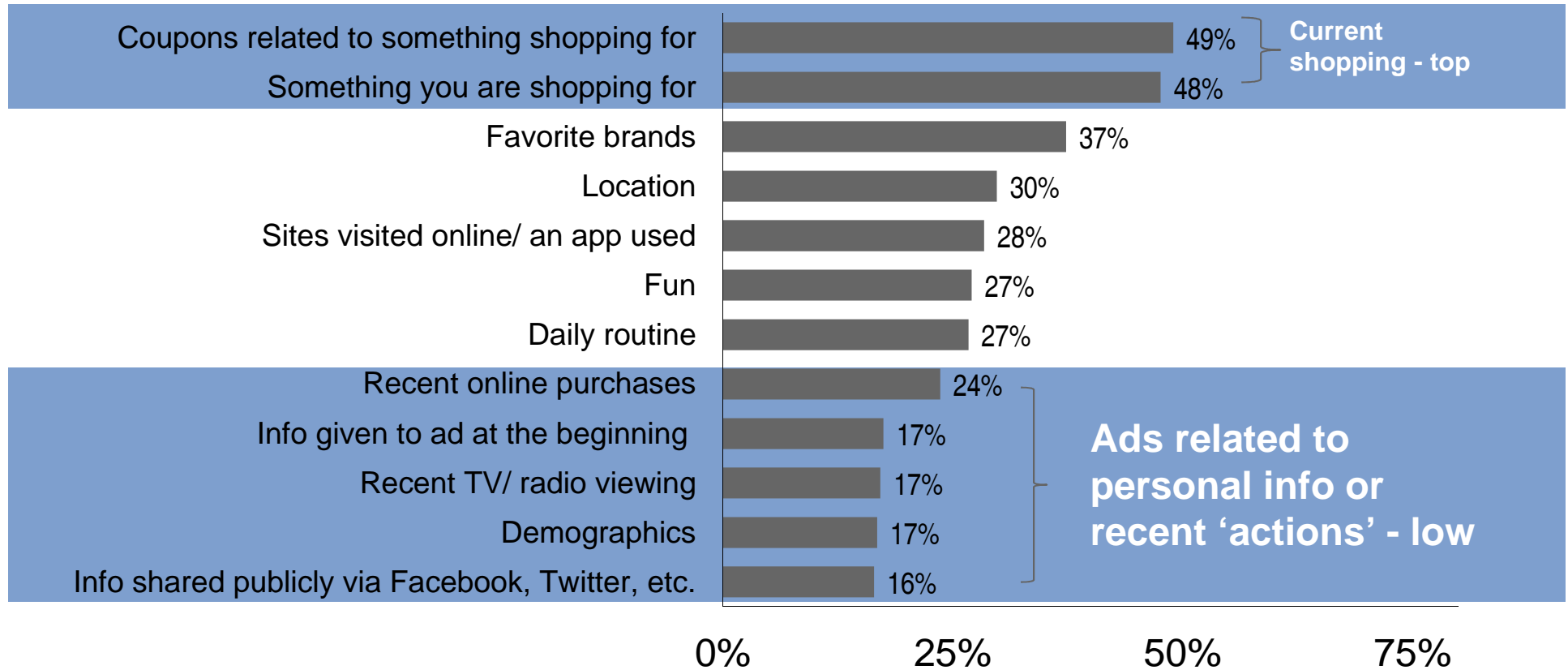


Question: Many print publications (newspapers and magazines) have come out with digital versions for smartphones or tablets. Thinking about the newspapers and magazines that you read, how much, if at all, are you using their smartphone/tablet editions?

Ad Types Driving Most Likely Response for Smartphone Users

SUPPLEMENTAL

Ad Types Driving Most Likely Response on Smartphones



Percentage of Mobile Data Users That Interact w/ Ads on Device

Question: What kinds of ads are you most likely to respond to on your [device]? (please select all that apply)