



Always On -

A Global Perspective of Mobile Consumer Experience

June 2017

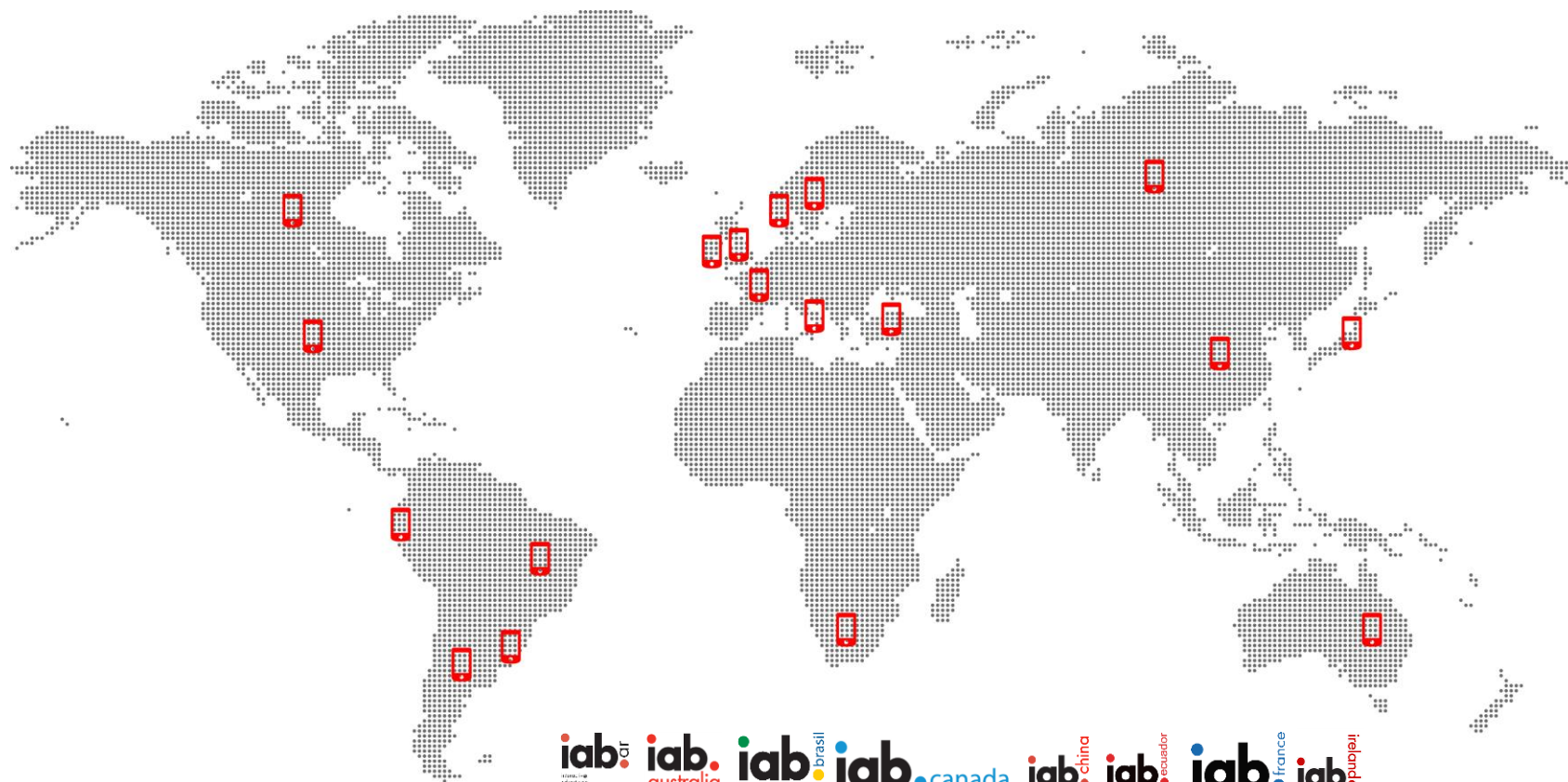
Objectives and Background

Today's consumers around the globe are living in an "always-on" world due to the ubiquity of mobile devices and mobile internet access. The IAB Mobile Marketing Center of Excellence, in conjunction with 17 IABs from around the globe, aims to uncover the latest trends of mobile behaviors and perceptions, particularly among global smartphone owners and mobile internet users. This study examines how consumers access and use the mobile internet and how they perceive and react to mobile advertising.

Specifically, the key interests lie in understanding and comparing the usage pattern of mobile web and mobile apps to access the internet among smartphone users across the participating countries. This deck focusses on Australia and how our market compares to the rest of the world.

The main objectives for this research project are to:

- Understand consumers' mobile internet usage and perceptions toward the experience on mobile web and mobile apps.
- Examine whether there are differences in consumer reaction and perceptions to advertising on these two mobile platforms.



18 countries participated in the research, 200 representative smartphone owners from each country.

All respondents must access the internet via mobile web and/or mobile apps.

When referencing global average or regional average throughout this report, the results are derived from the 18 participating countries.

See Appendix for more details on methodology and sample specification.

The global mobile adoption and usage is prevalent. Mobile devices are an integral part of consumers' daily lives.

- The majority (63%) of smartphone owners worldwide claim to use their mobile device at least every 30 minutes, Australians are higher than average with 70% claiming to do so. This usage includes any and all different ways a mobile device can be used, from making calls, to checking the time, to accessing the internet.
- Consumers are moving fluidly between mobile web and mobile apps with over 50% of smartphone users accessing both multiple times a day.

Despite the clear potential and the current success of mobile advertising in cutting through and motivating actions, consumers perceptions of mobile advertising exhibit both improvements and challenges. There is a similar pattern of advertising perceptions on mobile web and mobile apps.

- Smartphone users worldwide report having seen improvements in ad loading speed and creative quality on both platforms.
- Australians have noticed more improvement in creative and have been less sensitive to increased intrusiveness than other markets. While 60% of Australians have noticed an increase in ads on mobile devices, one in three have noticed an improvement in creative quality over the last 12 months

Consumer's preference towards using mobile web and mobile apps varies by type of activities and type of content. Generally speaking, mobile web leans towards functionality and utility, whereas mobile apps skew personal and social.

- Among consumers who use both mobile web and mobile apps to access the internet, there is a clear preference for mobile web when conducting utility-oriented activities as search, booking services, and purchasing products.
- When it comes to entertainment and communications which could be considered personal and social in nature, such as messaging, calling, social networking, watching video, listening to music etc., mobile apps are preferred.
- The functional/utility vs. personal/social distinction is further evident in consumers' preference by content type. The mobile web environment is clearly preferred when it comes to accessing information about education/work, travel, and news. For entertainment content, such as videos and gaming, and social networking, mobile apps are preferred.

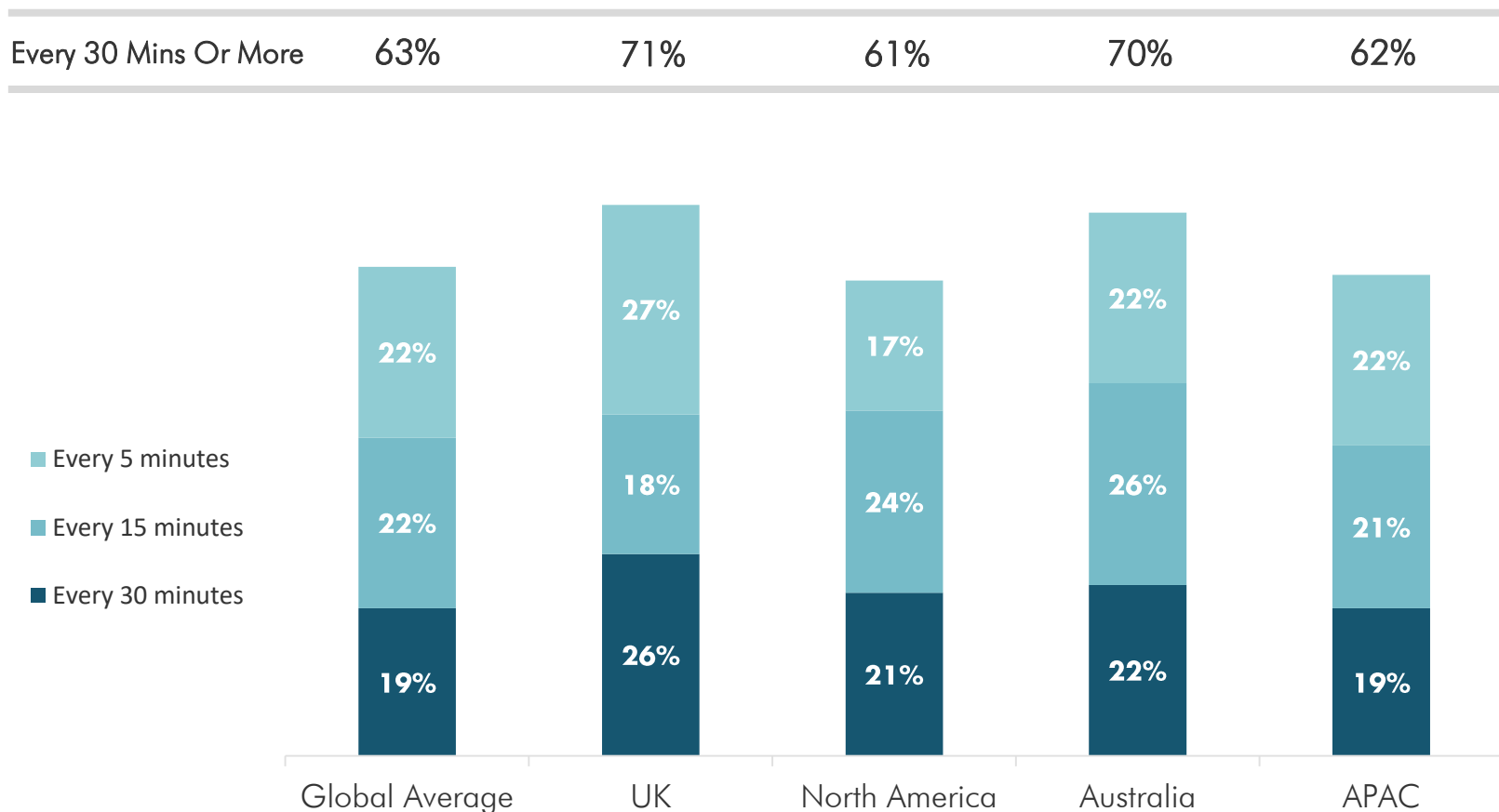
Mobile usage is global and prevalent.
Mobile devices are an integral part of
consumers' daily lives.



63% of global smartphone users claim to use their mobile device at least every 30 minutes, over a fifth do so every 5 minutes. One in seven Australians claim to use their device at least every 30 minutes

Q8. On a typical day when you use a mobile device, how frequently would you say you use it? By using your mobile device we mean anything and everything you can do with it. From making a call, to checking the time, to accessing the internet, reading a book, playing a game or taking a photo. All the different actions you use your mobile device for.

Frequency of Mobile Device Usage (on a typical day)

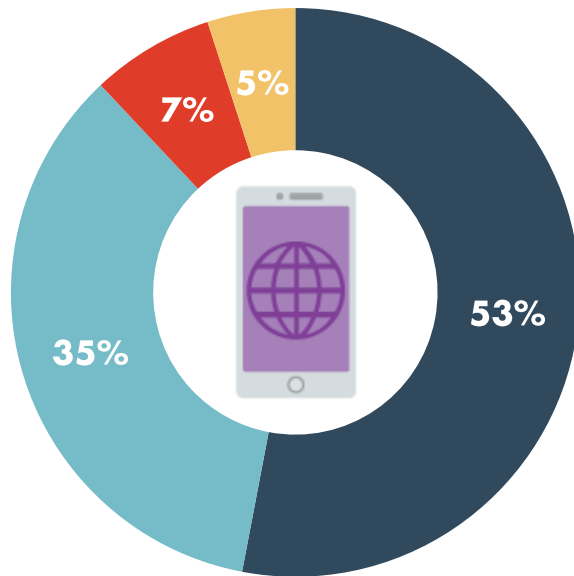


Base: Smartphone users who access the internet via mobile web and/or mobile app

Global: Both mobile web and mobile apps are used frequently by smartphone owners to access the internet. This pattern is similar across all regions and countries.

Q12 & Q13. How frequently do you access or use the internet on your mobile device using...?

Mobile Web

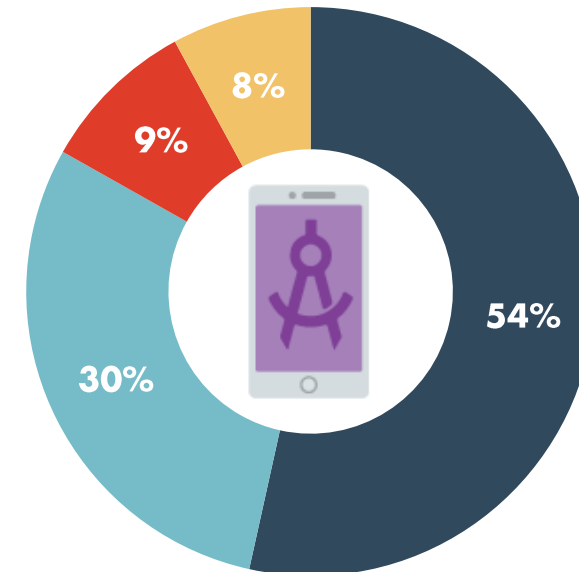


**Daily/Multiple times
a day: 88%**

Frequency of Usage

- Multiple times a day
- Daily
- 1-2 times a week
- Monthly or less

Mobile App

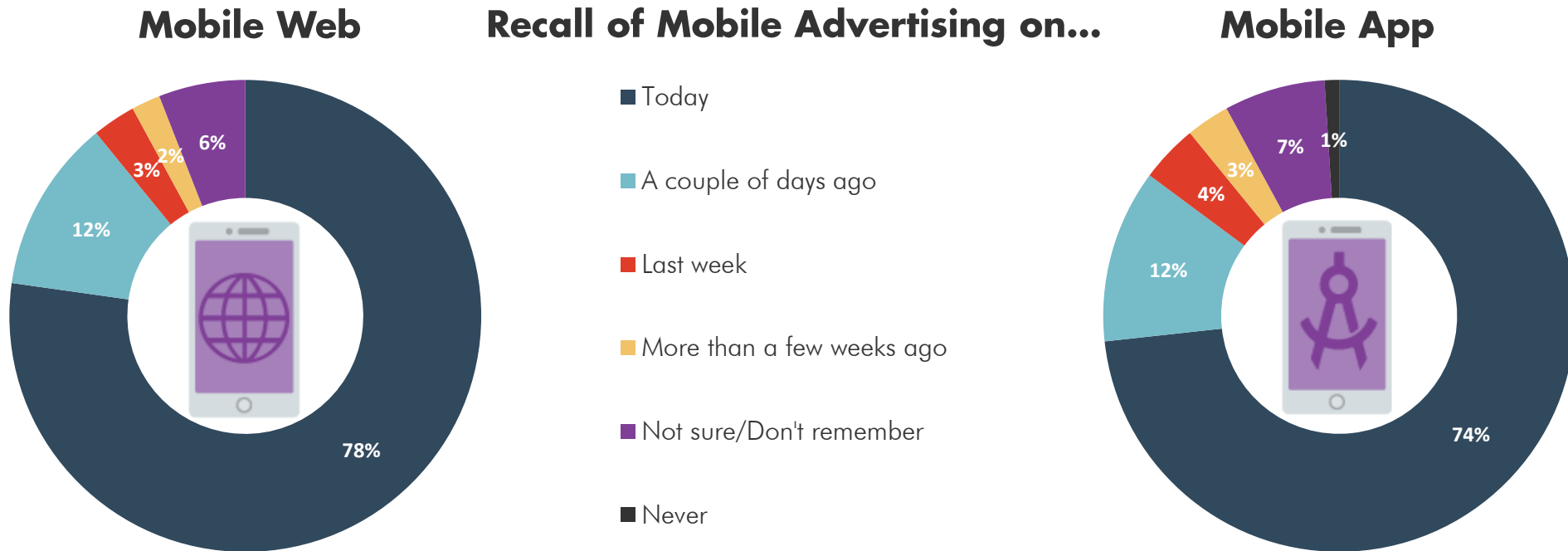


**Daily/Multiple
times a day: 84%**

Base: Smartphone users who access the internet via mobile web and/or mobile app

Global: Awareness of advertising on both mobile platforms is high – nearly all remember seeing mobile advertising within the first couple of days. This is consistent across regions and countries.

Q20/Q22. When was the last time you remember seeing an ad on your mobile device when accessing the mobile internet on the mobile web/using a mobile app?



Base: Smartphone users who access the internet via mobile web and/or mobile app

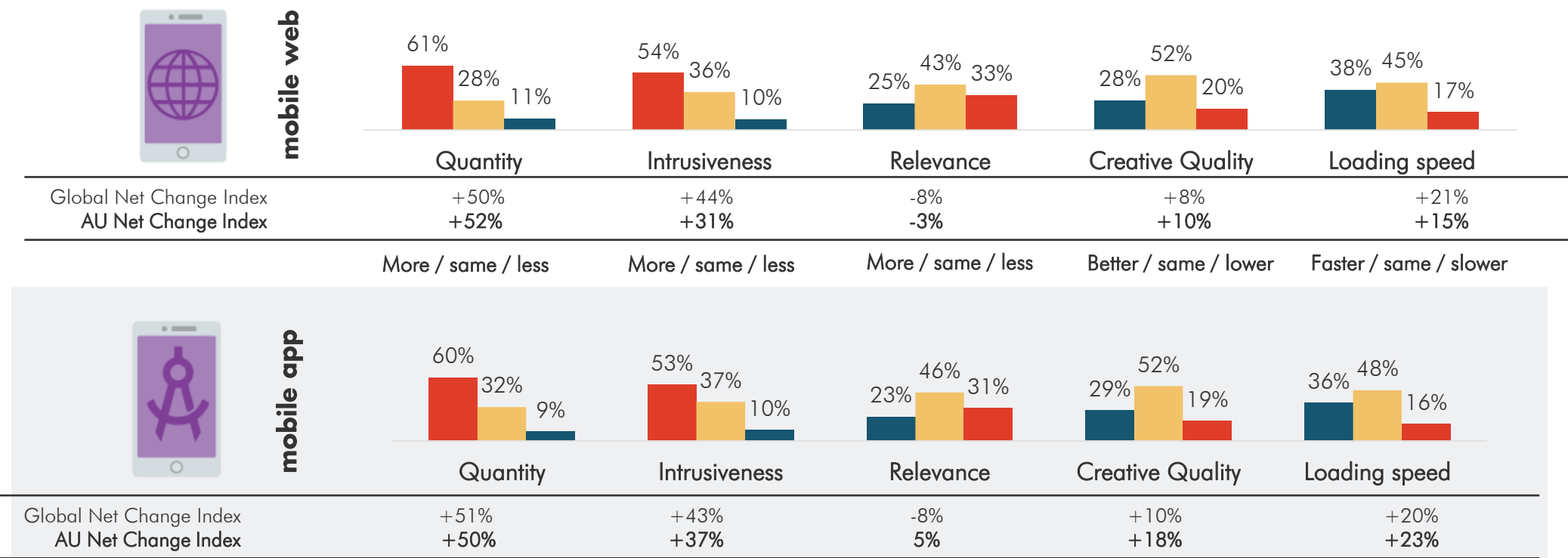
Smartphone users worldwide report both improvements and challenges about their mobile advertising experiences.



Global Results: Smartphone users report positive changes to ad loading speed & creative quality on both mobile web & mobile apps; however, there are consistent concerns across the globe about increased quantity & intrusiveness of ads.

Q24/Q28 Advertising Diagnostics mobile web v mobile app: Now we'd like you to think about a few aspects of the mobile ads you see when accessing the mobile internet. How do you feel about the mobile ads compared to a year ago when using the mobile web/a mobile app?

Summary – Mobile advertising perception compared to a year ago

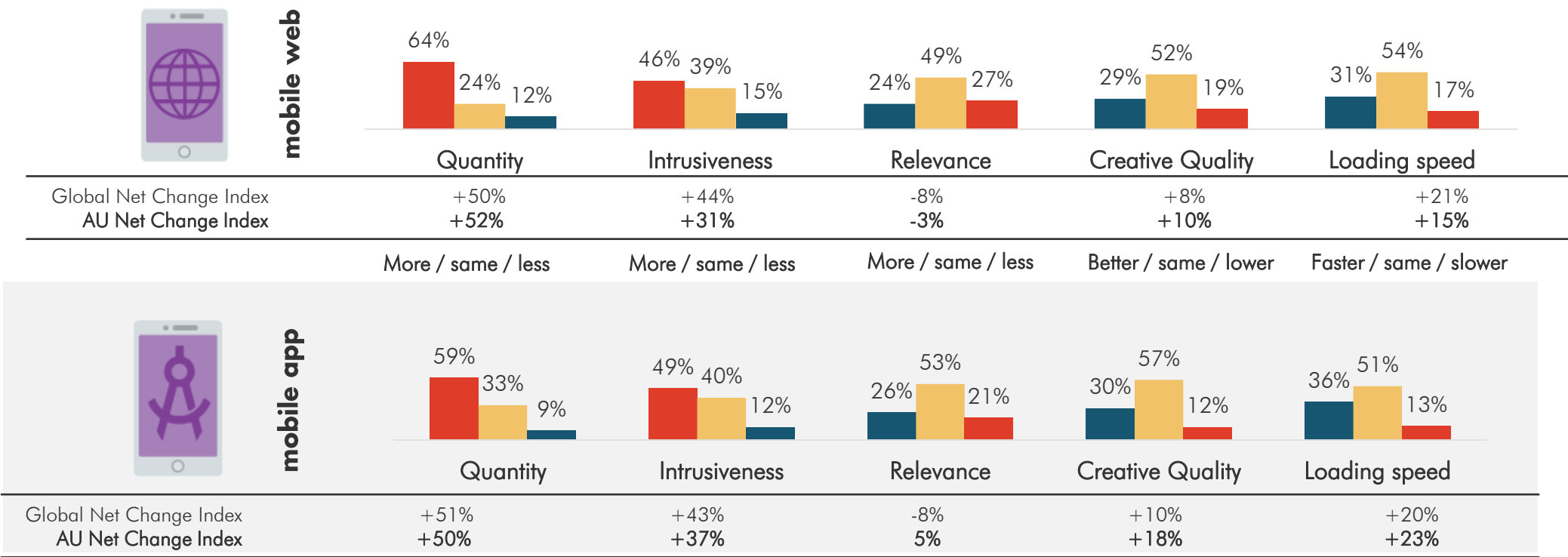


Base: Smartphone users who access the internet via mobile web and/or mobile app

Aus Results: Australians have noticed more improvement in creative and have been less sensitive to increased intrusiveness

Q24/Q28 Advertising Diagnostics mobile web v mobile app: Now we'd like you to think about a few aspects of the mobile ads you see when accessing the mobile internet. How do you feel about the mobile ads compared to a year ago when using the mobile web/a mobile app?

Summary – AU Mobile advertising perception compared to a year ago



Base: AU Smartphone users who access the internet via mobile web and/or mobile app

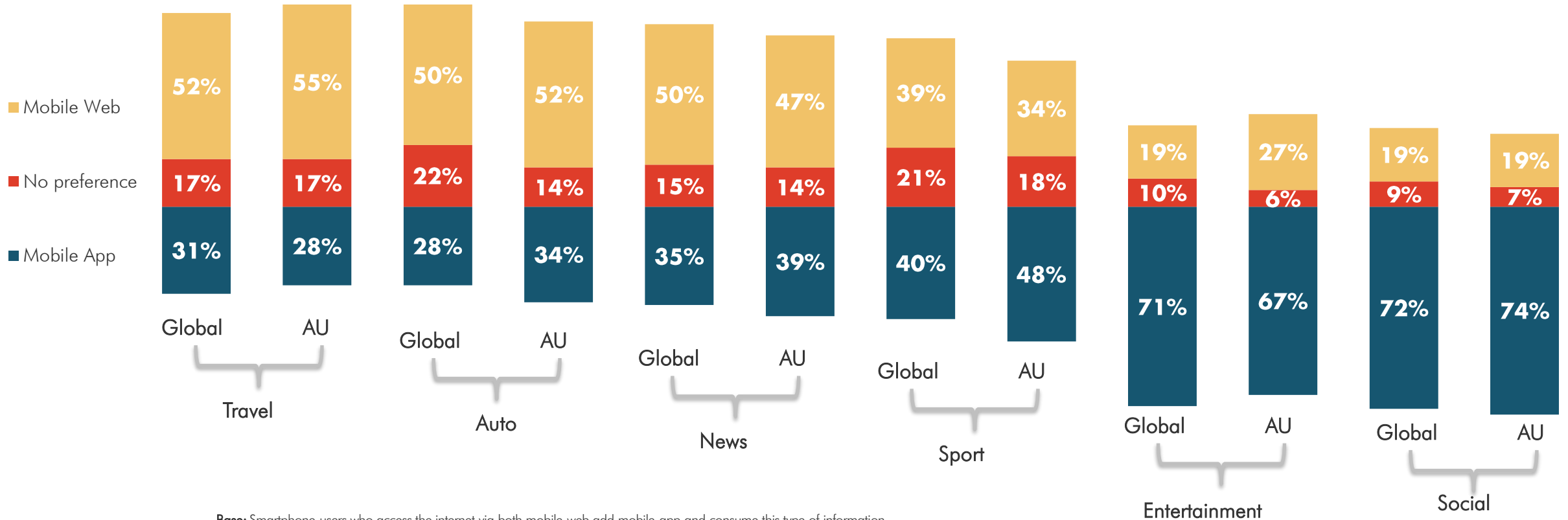
Platform distinction - mobile web: the functional environment, mobile app: the personal and social one.



Smartphone users generally gravitate towards mobile app for entertainment and social content. Australian preferences are similar to the rest of the world apart from a slightly higher preference for sporting apps

Q18. Now let's talk about the type of information you can access and consume via the mobile internet. What types of categories or genres do you prefer to use the mobile web or a mobile app to do?

Consumer Preference – Content Type

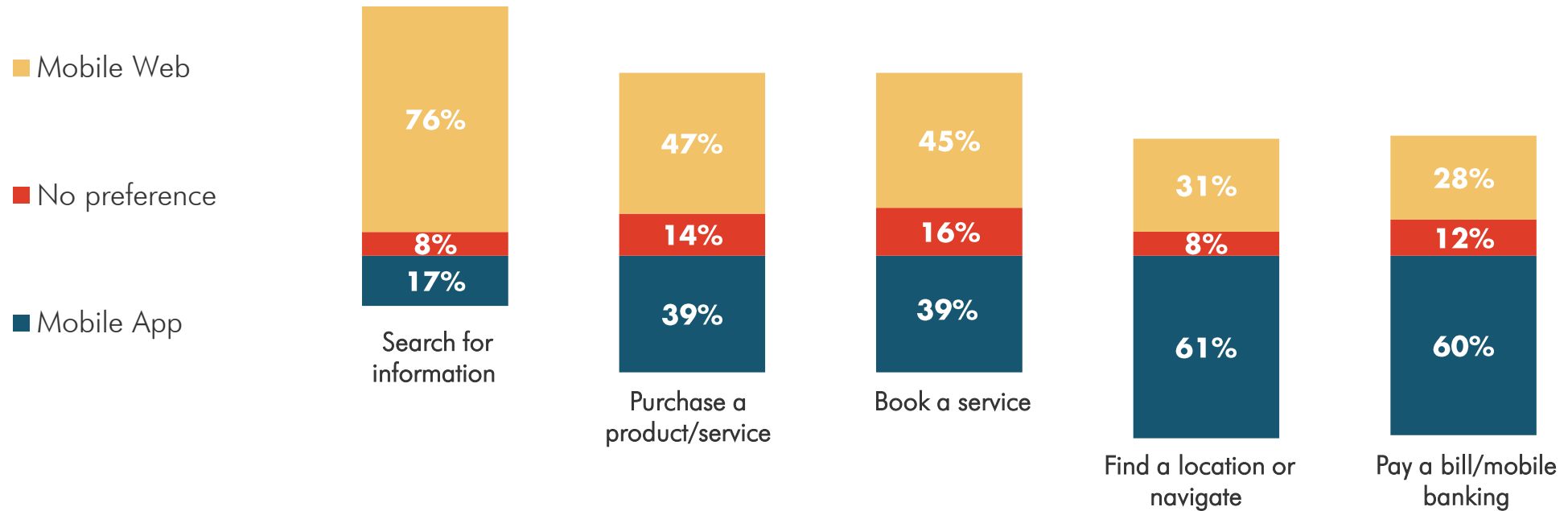


Base: Smartphone users who access the internet via both mobile web and mobile app and consume this type of information

Global: Search, purchasing, and booking products or services are dominant mobile web functions; for navigation and banking, mobile apps are more preferred.

Q17. Think about the following activities you can do via the mobile internet, which of these do you prefer to use the mobile web or a mobile app to do?

Consumer Preference - Utility/Functionality

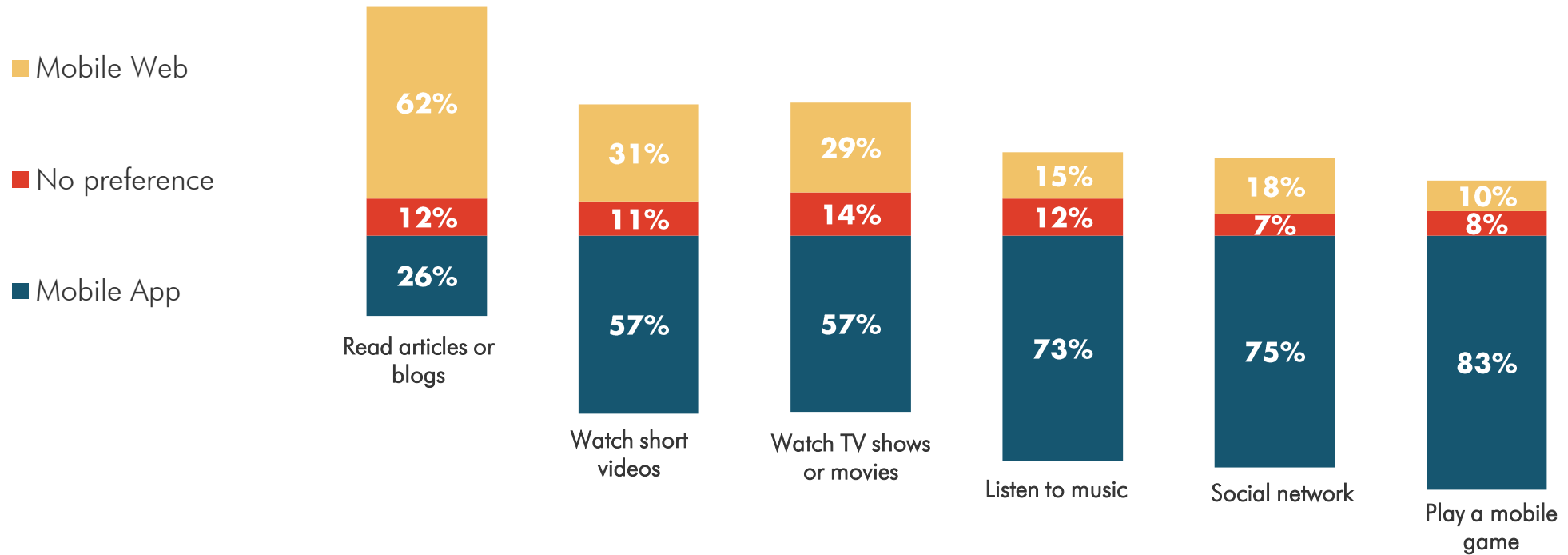


Base: Smartphone users who access the internet via both mobile web and mobile app and do this activity

Global: When it comes to entertainment such as videos, movies, music, gaming, and social networking, consumers consistently prefer mobile apps.

Q17. Think about the following activities you can do via the mobile internet, which of these do you prefer to use the mobile web or a mobile app to do?

Consumer Preference - Entertainment

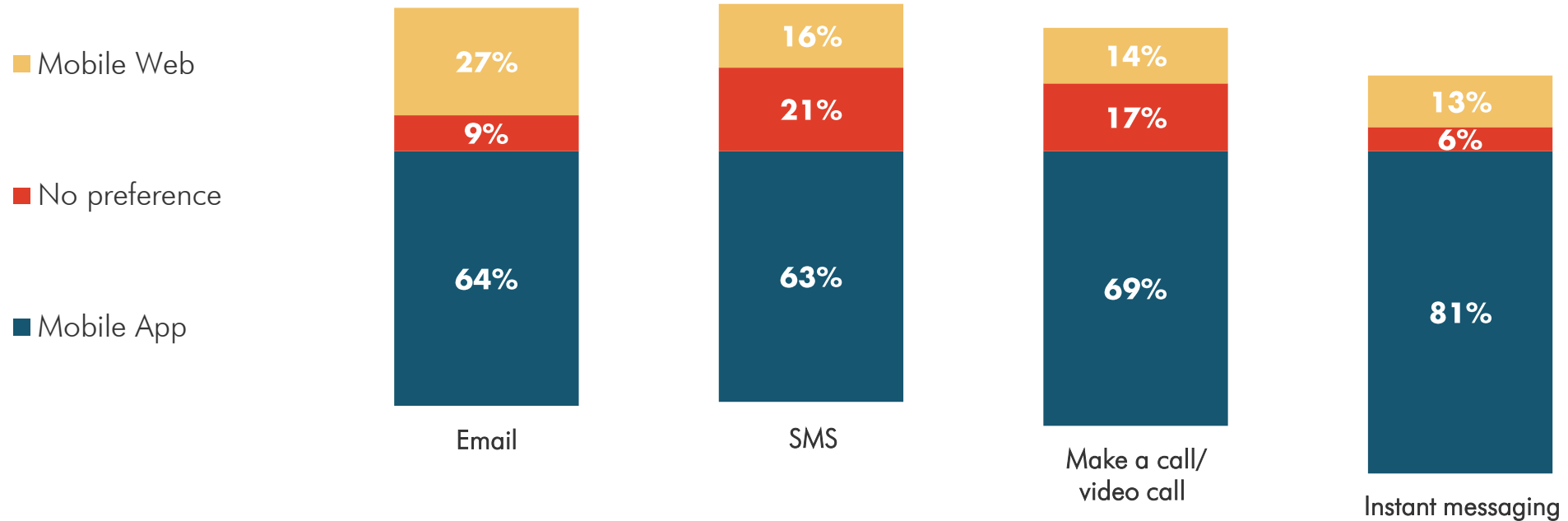


Base: Smartphone users who access the internet via both mobile web and mobile app and do this activity

Global: Mobile apps are the choice of communications functionalities including email, messaging and calling/video calling.

Q17. Think about the following activities you can do via the mobile internet, which of these do you prefer to use the mobile web or a mobile app to do?

Consumer Preference - Communications



Base: Smartphone users who access the internet via both mobile web and mobile app and do this activity

About IAB Australia

The Interactive Advertising Bureau (IAB) Limited is the peak trade association for online advertising in Australia and was incorporated in July 2010. As one of 44 IAB offices globally, and with a rapidly growing membership, IAB Australia's principal objective is to support and enable the media and marketing industry to thrive in the digital economy.

The role of the IAB is to work with its members and the broader advertising and marketing industry to assist marketers to identify how best to employ online as part of their marketing strategy, to better target and engage their customers and build their brands.

By addressing the core pillars of growth of the online advertising industry - simplified and standard online audience measurement, research, and online operational standards and guidelines, and regulatory affairs, IAB Australia leverages the skills, experience and commitment of its members to advocate the benefits of online advertising by acting as an authoritative and objective source for all online advertising issues whilst promoting industry-wide best practice.

IAB Australia is a registered not-for-profit organisation; membership fees and revenue generated is invested back into the IAB's membership benefits such as resources, events, reporting, and industry representation.

APPENDIX

Research Sample

Method:

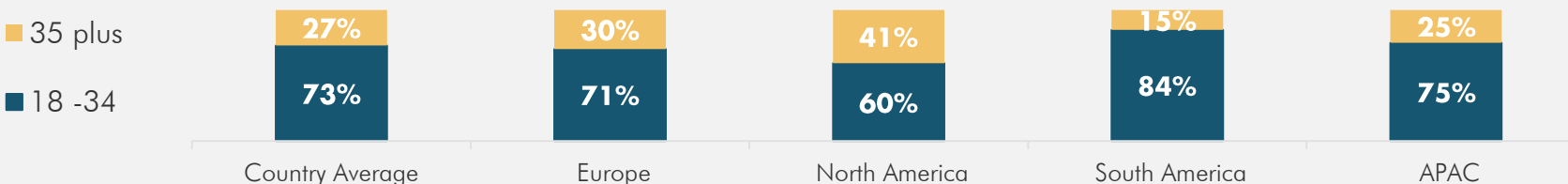
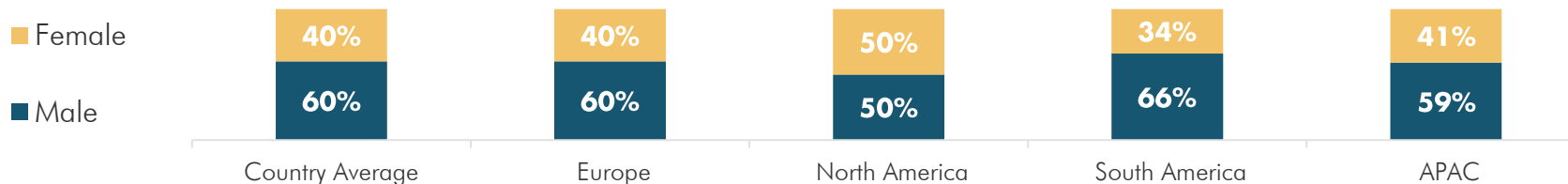
- 22 question survey was designed and fielded in 18 markets
- All respondents were asked the same questions.

Sample Target:

- N=200 per market
 - o 18 years or older
 - o Own and use a smartphone,
 - o Aware of and use either mobile web and/or mobile apps to access the internet on their mobile device.

Fieldwork Period:

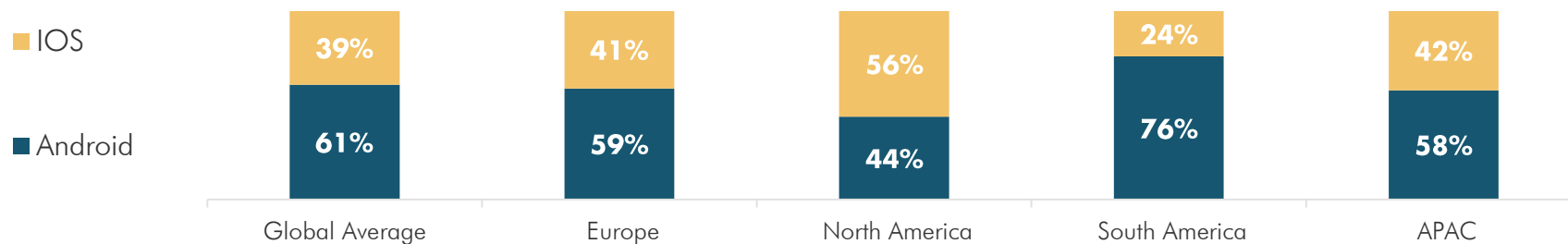
From – 21st April 2017
To – 8th May 2017



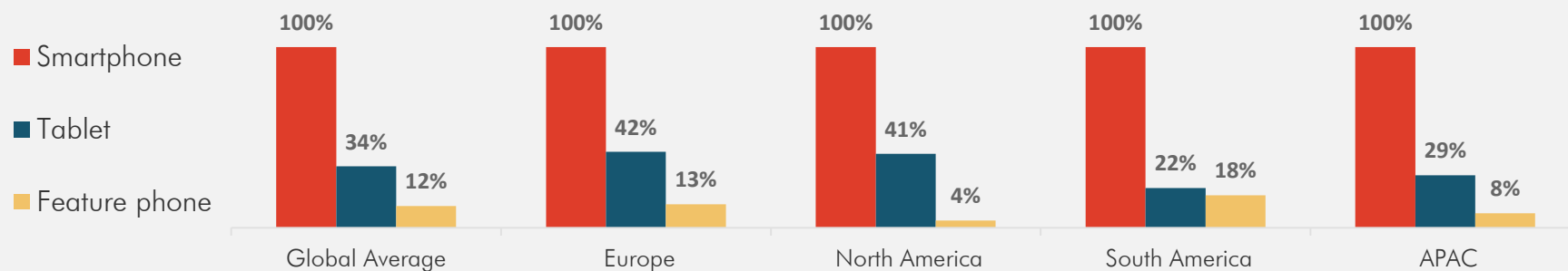
Base: All Participating Countries (3600), per market (200)

Research Sample (Cont.)

Operating System



Ownership by Device Type



Base: All Participating Countries (3600), per market (200)