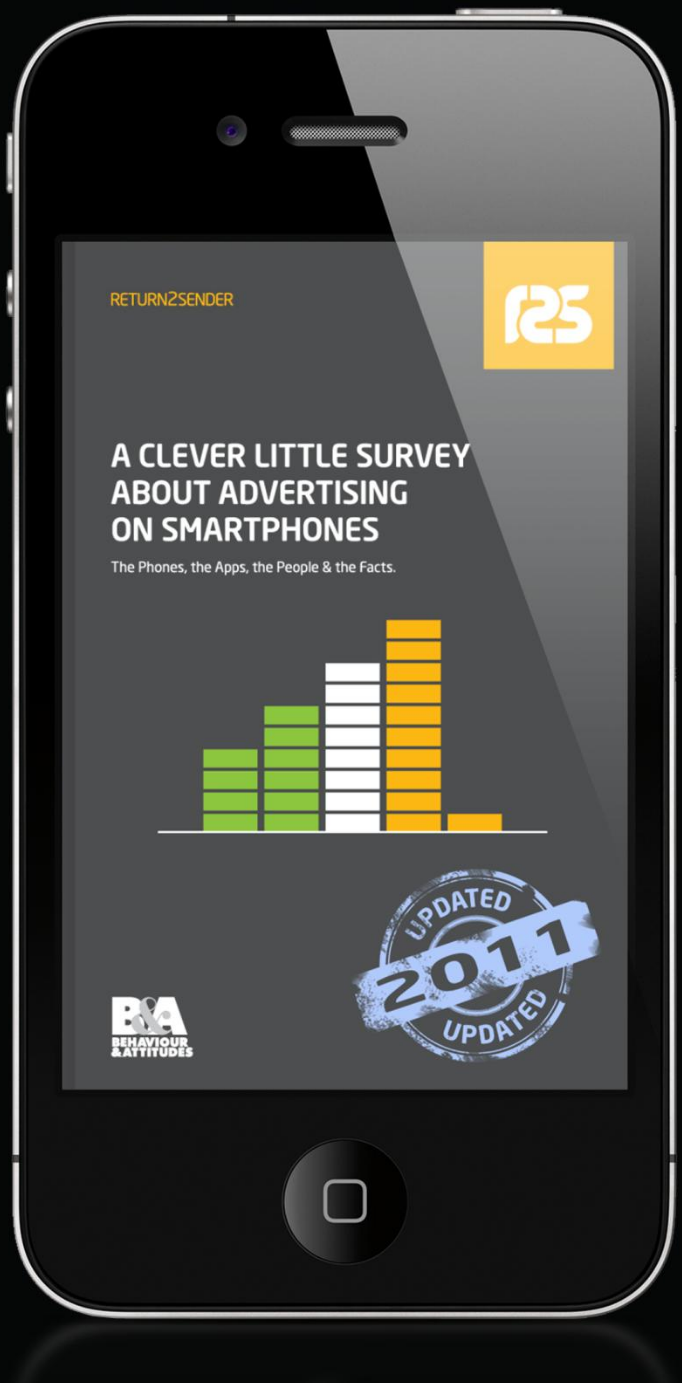


# Mobile Research
# June 2011

# Background & Objectives

- Decision taken to conduct a quantitative research survey of Irish adults aged 16 years +, the objective of which is to generate reliable market data of use in informing Return2Sender's strategic planning and PR efforts.
- Specific research objectives to gather statistically valid and reliable data from amongst a representative sample of Irish adults with regard to:
  - Ownership/usage of pre-identified mobile devices and applications
  - Potential future levels of uptake of specific mobile devices and applications
  - Proportion of population downloading apps (and average number downloaded)
  - Proportion of downloaded apps paid for/free
  - Average price paid for Apps purchased
  - Types of apps downloaded
  - Disposition towards various types of mobile phone advertising
  - Types of information searched for online via mobile phone
  - Levels of mobile phone discount offer redemption

# Methodology & Timing

- Survey conducted via the Behaviour & Attitudes Barometer Omnibus vehicle.
- The Barometer Survey is a nationally representative survey undertaken among 1,000 adults aged 16+. It involves a quota sample that closely matches the adult population in terms of sex, age, social class, region and area.
- Fieldwork for this study was conducted over the period 3rd - 17th June, 2011.

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# Findings

# Mobile Device Ownership

Base: all adults (n=1,002)

| | | CURRENTLY OWN % Sep-10 | CURRENTLY OWN % Jun-11 | Population Estimate Sep-10 | Population Estimate Jun-11 | LIKELY TO PURCHASE NEXT 6 MTHS % Sep-11 | LIKELY TO PURCHASE NEXT 6 MTHS % Jun-11 | Population Estimate Sep-11 | Population Estimate Jun-11 | Potential Market over next 6 months (Sep) | Potential Market over next 6 months (Jun) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| iPhone |  | 7 | 9 | 256,000 | 326,000 | 10 | 4 | 357,000 | 145,000 | 613,000 | 471,000 |
| Android-enabled phone |  | 3 | 6 | 123,000 | 219,000 | 3 | 2 | 97,000 | 70,000 | 220,000 | 289,000 |
| Other smartphone |  | 8 | 7 | 269,000 | 233,000 | 3 | 3 | 116,000 | 93,000 | 385,000 | 326,000 |
| Any smartphone |  | 17 | 21 | 611,000 | 741,000 | 14 | 9 | 509,000 | 308,000 | 1.12million | 1.04million |
| iPad |  | 2 | 2 | 85,000 | 57,000 | 3 | 2 | 97,000 | 70,000 | 182,000 | 127,000 |

Three-quarters of a million Irish adults now own a smartphone – an increase of over 100,000 users in just nine months. Based on last year's study, there would appear to be a realistic potential for sales of an additional 70,000-80,000 smartphones between now and next Spring.

Q.1 Which of the following do you currently own or use?
Q.2 And are you likely to __________(READ OUT OPTION) within the next six months or so?

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# Mobile Device User Profiles

## Base: All owning devices

| | Total | Currently own or use | |
|---|---|---|---|
| | | iPhone | Any Smartphone |
| *Base:* | *1011* | *94* | *214* |
| **Gender** | % | % | % |
| Male | 49 | **65** | **62** |
| Female | 51 | 35 | 38 |
| **Status** | | | |
| Shopper | 60 | 55 | 51 |
| Other | 40 | 45 | 49 |
| **Age** | | | |
| -24 | 16 | 17 | **27** |
| 25-34 | 22 | **45** | **36** |
| 35-49 | 27 | **31** | 29 |
| 50-64 | 20 | 4 | 7 |
| 65+ | 14 | 2 | 1 |
| **Social Class** | | | |
| ABC1 | 41 | 56 | 57 |
| C2DE | 51 | 40 | 41 |
| F | 8 | 4 | 2 |
| **Region** | | | |
| Dublin | 28 | 43 | 38 |
| Leinster | 27 | 21 | 27 |
| Munster | 28 | 23 | 25 |
| Conn/Ulster | 18 | 13 | 10 |
| **Area** | | | |
| Urban | 61 | 75 | 71 |
| Rural | 39 | 25 | 29 |

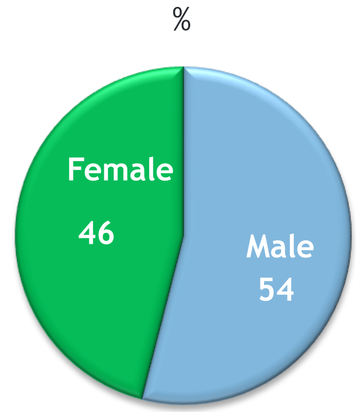
Users of the iphone a little older than general smartphone users

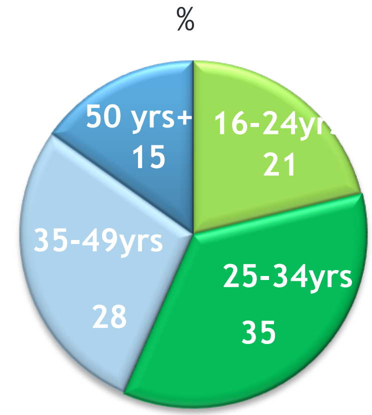
Q.1 Which of the following do you currently own or use?

# Mobile Apps – Usage Versus Download

Base: all adults (n=1,011)

355,000 claim to use mobile phone apps, of whom….




Of whom….

188,000 can estimate how many they have downloaded → With an average of 19 downloads per person → Resulting in a minimum estimated 3.55 million apps downloaded so far in Ireland

+

65,000 cannot estimate how many they have downloaded → Assuming an average 19 downloads per person → An additional estimated 1.24 million apps downloaded

↓

Resulting in a total estimated 4.8 million apps downloaded in Ireland to date

103,000 have not actually downloaded any themselves

**Approximately 5 million apps downloaded in Ireland by June, 2011**

Q.3 Approximately how many Apps have you downloaded to your phone altogether?

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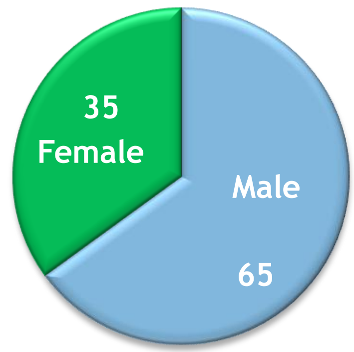
# Profile of Apps Downloaders, and Proportion Paid For

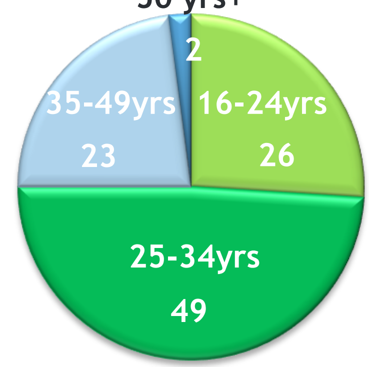
**Base: all aware how many apps downloaded (n=50 Pop Estimate 188,000)**

All apps downloaders 188,000

%




%




Estimated number of apps downloaded 4.8 million. Of which...

An estimated 672,000 were paid for (14%)

With an estimated 4.1 million downloaded free (86%)

While roughly half of all paid for apps cost less than €2, the evidence is that paid for apps represent a multi-million euro revenue stream.

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Q.4 And roughly what proportion of these Apps were paid for, and what proportion were free of charge?

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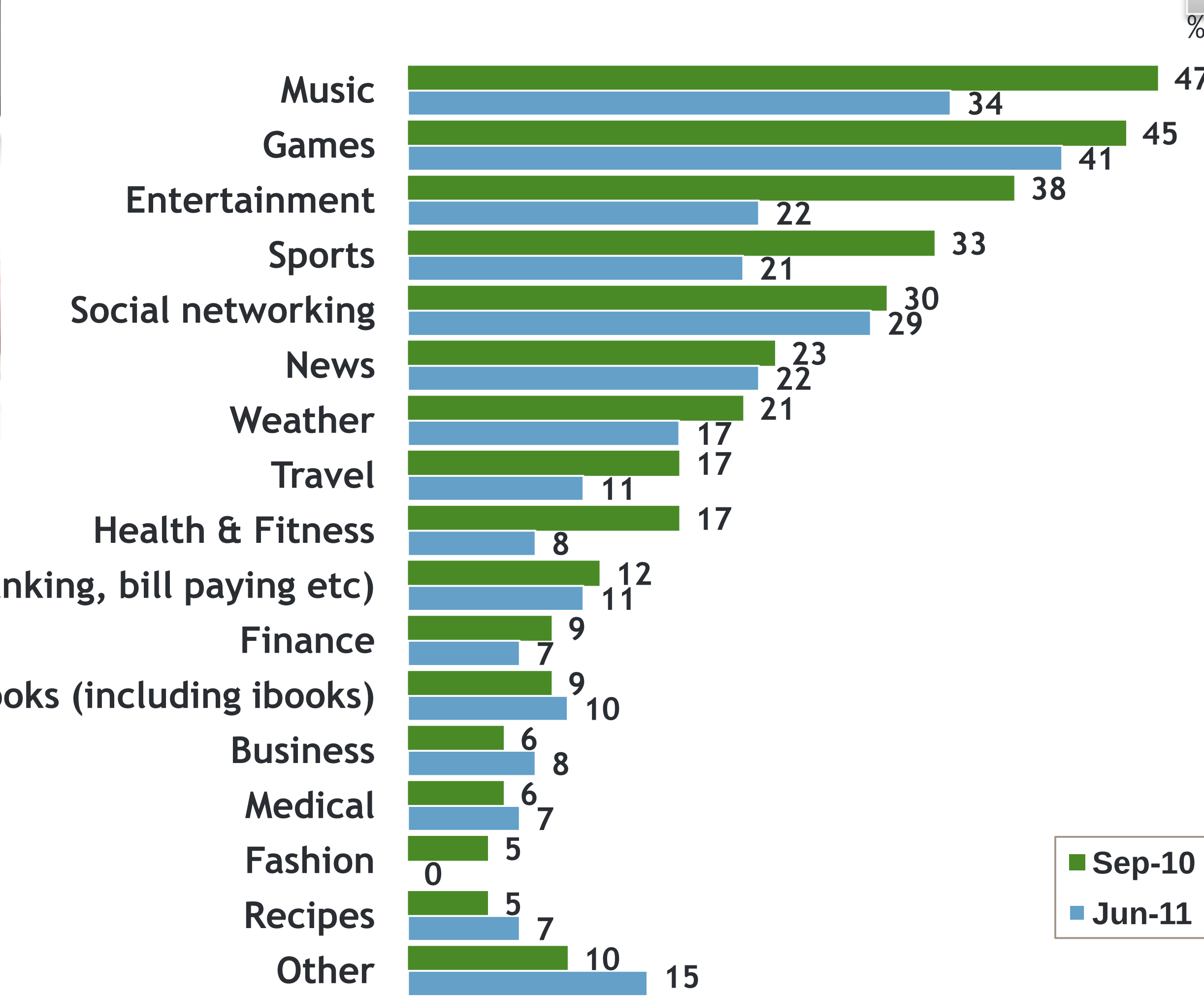
# Types of Apps. Downloaded so Far

Base: all downloading any apps (n=139. Pop Estimate 494,000)




| | Population Estimate (June 2011) |
|---|---|
| Music | 120,000 |
| Games | 147,000 |
| Entertainment | 78,000 |
| Sports | 74,000 |
| Social networking | 101,000 |
| News | 80,000 |
| Weather | 62,000 |
| Travel | 39,000 |
| Health & Fitness | 30,000 |
| Utilities (Banking, bill paying etc) | 39,000 |
| Finance | 25,000 |
| Books (including ibooks) | 37,000 |
| Business | 27,000 |
| Medical | 25,000 |
| Fashion | n/a |
| Recipes | 24,000 |
| Other | 52,000 |

Music, games and social networking, are the most popular type of apps downloads, with sports, entertainment, news and weather also performing strongly.

Q.5 Which of these types of Apps have you downloaded so far?

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# Likelihood of Looking at/Listening to Advertising by Way of….

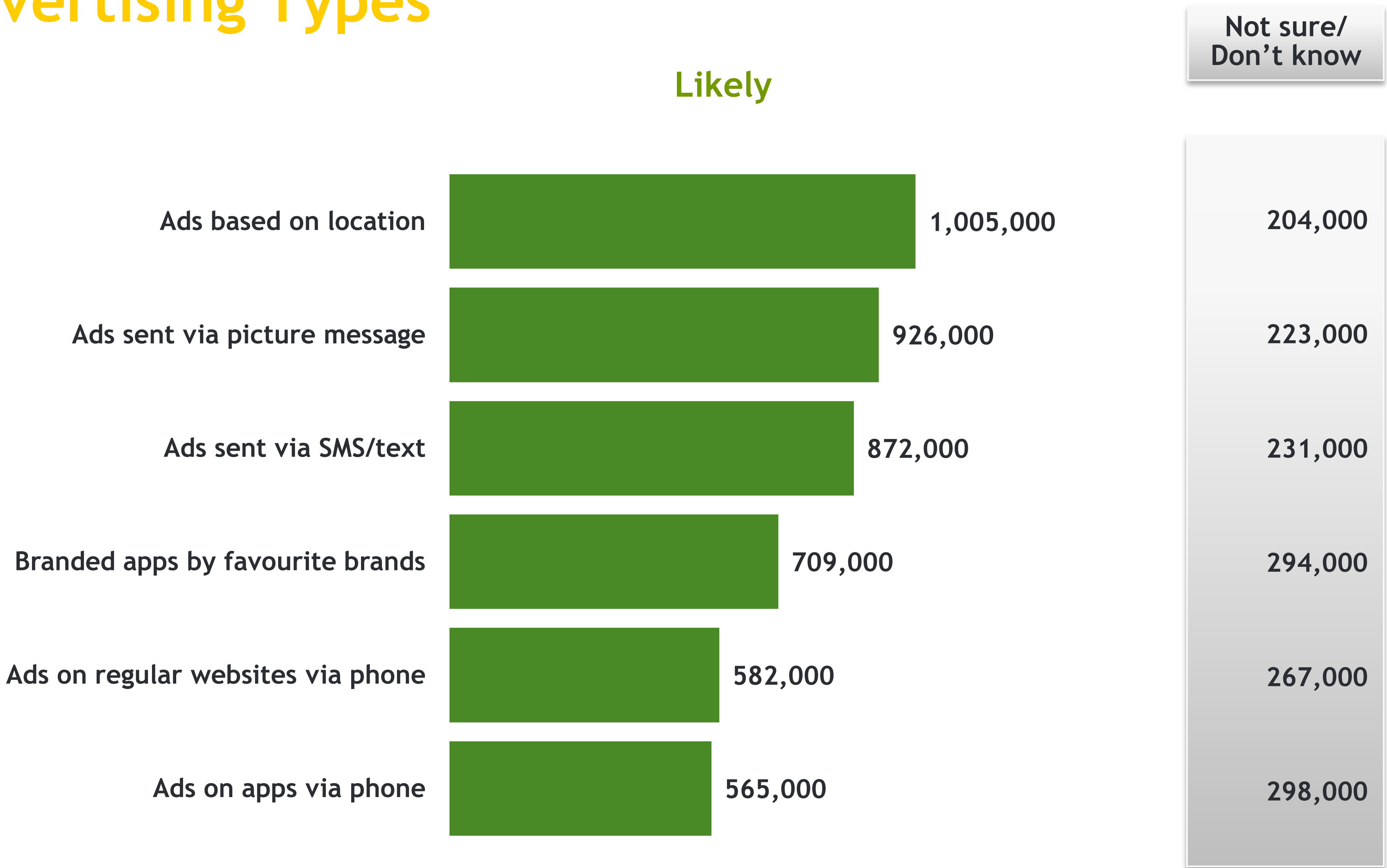
Base: all adults (n=1,002:1011)

| | Ads sent by SMS/text | | Ads Sent Via Picture message | Ads appearing on regular websites through your phone | | Ads appearing on Apps through your phone | | Branded apps - apps built by some of your favourite brands | | Ads Based on location |
|---|---|---|---|---|---|---|---|---|---|---|
| | *Sep10* | *Jun11* | *Jun11* | *Sep10* | *Jun11* | *Sep10* | *Jun11* | *Sep10* | *Jun11* | *Jun11* |
| | % | % | % | % | % | % | % | % | % | % |
| Would definitely listen to/look at | 16 | 7 | 7 | 3 | 3 | 3 | 3 | 3 | 3 | 7 |
| Would probably listen to/look at | 25 | 18 | 20 | 11 | 14 | 9 | 13 | 9 | 17 | 22 |
| Would probably not listen to/look at | 12 | 11 | 9 | 17 | 11 | 14 | 10 | 14 | 9 | 9 |
| Would definitely not listen to/look at | 37 | 58 | 58 | 48 | 65 | 46 | 65 | 45 | 63 | 56 |
| Don't know | 10 | 7 | 6 | 20 | 8 | 28 | 8 | 29 | 8 | 6 |
| **Summary** | | | | | | | | | | |
| Likely | 41 | 25 | 26 | 14 | 17 | 12 | 16 | 11 | 20 | 29 |
| Not Likely | 48 | 69 | 67 | 66 | 76 | 60 | 75 | 60 | 72 | 66 |

People are most receptive to mobile advertising based on location, as well as via MMS, SMS and branded apps. Interest in SMS advertising has declined, but has increased significantly for branded apps

Q.7 How likely would you be to listen to or look at advertising through your mobile by way of….

# Estimated Numbers Likely to Engage With Mobile Advertising Types




These figures suggest there is enormous potential for mobile phone advertising in the future, with well over a million people at least open to most of the main mobile advertising channels.

Q.7 How likely would you be to listen to or look at advertising through your mobile ph by way of….

# Profile of Those Likely to Engage With Mobile Advertising Types

Base: all likely to engage

| | Total | LIKELY TO LISTEN/LOOK | | | | | |
|---|---|---|---|---|---|---|---|
| | | Ads sent by SMS/text | Ads sent via picture message (mms) | Ads appearing on regular websites through your phone | Ads appearing on Apps through your phone | Branded apps - apps built by some of your favourite brands | Ads based on location |
| *Base:* | ***1011*** | ***254*** | ***266*** | ***173*** | ***168*** | ***206*** | ***292*** |
| **GENDER** | % | % | % | % | % | % | % |
| Male | 47 | 47 | 52 | 56 | 58 | 52 | 47 |
| Female | 53 | 53 | 48 | 44 | 42 | 48 | 53 |
| **AGE** | | | | | | | |
| 16-24 | 27 | 30 | 32 | 32 | 32 | 29 | 27 |
| 25-34 | 29 | 31 | 31 | 33 | 34 | 34 | 29 |
| 45-49 | 27 | 24 | 24 | 26 | 24 | 25 | 27 |
| 50-64 | 12 | 11 | 11 | 7 | 7 | 9 | 12 |
| 65+ | 4 | 4 | 3 | 2 | 2 | 3 | 4 |

Those open to mobile phone advertising are well spread across all age groups from 16 to 49 years, and fairly evenly balanced by gender.

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Q.7 How likely would you be to listen to or look at advertising through your mobile phone by way of….

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# Media Planning Insights:
# Mobile Advertising Touchpoint Overlap - June 2011

Base: all likely to engage

| | Total | LIKELY TO LISTEN/LOOK | | | | | |
|---|---|---|---|---|---|---|---|
| | | Ads sent by SMS/text | Ads sent via picture message (mms) | Ads appearing on regular websites through your phone | Ads appearing on Apps through your phone | Branded apps - apps built by some of your favourite brands | Ads based on location |
| *Base:* | *1011* | *254* | *266* | *173* | *168* | *206* | *292* |
| | % | % | % | % | % | % | % |
| Ads sent by SMS/text | 25 | 100 | **79** | 79 | 76 | 66 | 66 |
| Ads sent via picture message (mms) | 26 | **84** | 100 | 82 | 81 | 75 | 69 |
| Ads appearing on regular websites through your phone | 17 | 52 | 51 | 100 | 84 | 64 | 50 |
| Ads appearing on Apps through your phone | 16 | 49 | 49 | 82 | 100 | 70 | 48 |
| Branded apps - apps built by some of your favourite brands | 20 | 54 | 57 | 78 | 88 | 100 | 59 |
| Ads based on location | 29 | **76** | **75** | 86 | 86 | 84 | 100 |

Ads based on location are well received by all mobile phone advertising enthusiasts. There is also evidence of a more 'traditionalist' segment (SMS + MMS advocates).

Q.7 How likely would you be to listen to or look at advertising through your mobile phone by w

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# Types of Information Sourced Using Mobile Phone Online

Base: all adults (n = 1011)

| | Total | LIKELY TO LISTEN/LOOK | | | | | |
|---|---|---|---|---|---|---|---|
| | | Ads sent by SMS/text | Ads sent via picture message (mms) | Ads appearing on regular websites through your phone | Ads appearing on Apps through your phone | Branded apps | Ads based on location |
| *Base:* | *1011* | *254* | *266* | *173* | *168* | *206* | *292* |
| | % | % | % | % | % | % | % |
| News (current affairs, sports, business, celebrity gossip, etc.) | 14 | 23 | 25 | 30 | 31 | 36 | 30 |
| Entertainment listings/guides | 14 | 28 | 29 | 36 | 35 | 37 | 32 |
| Travel information | 12 | 22 | 22 | 28 | 27 | 29 | 25 |
| Work/business-related information | 8 | 12 | 11 | 16 | 17 | 18 | 15 |
| Product/brand information (clothes, cars, household goods, etc. ) | 8 | 15 | 14 | 20 | 22 | 21 | 18 |
| Personal/family finance information | 7 | 14 | 14 | 14 | 16 | 16 | 16 |
| School/college/education information | 6 | 12 | 12 | 19 | 19 | 19 | 14 |
| Government services information | 5 | 11 | 10 | 13 | 11 | 13 | 10 |
| Health/wellbeing/parenting information | 5 | 10 | 9 | 13 | 12 | 12 | 11 |
| Property/accommodation information | 4 | 8 | 7 | 12 | 10 | 13 | 9 |
| Other | 4 | 8 | 9 | 6 | 6 | 9 | 7 |
| None – never search for information on a mobile phone | 72 | 50 | 48 | 38 | 37 | 34 | 43 |

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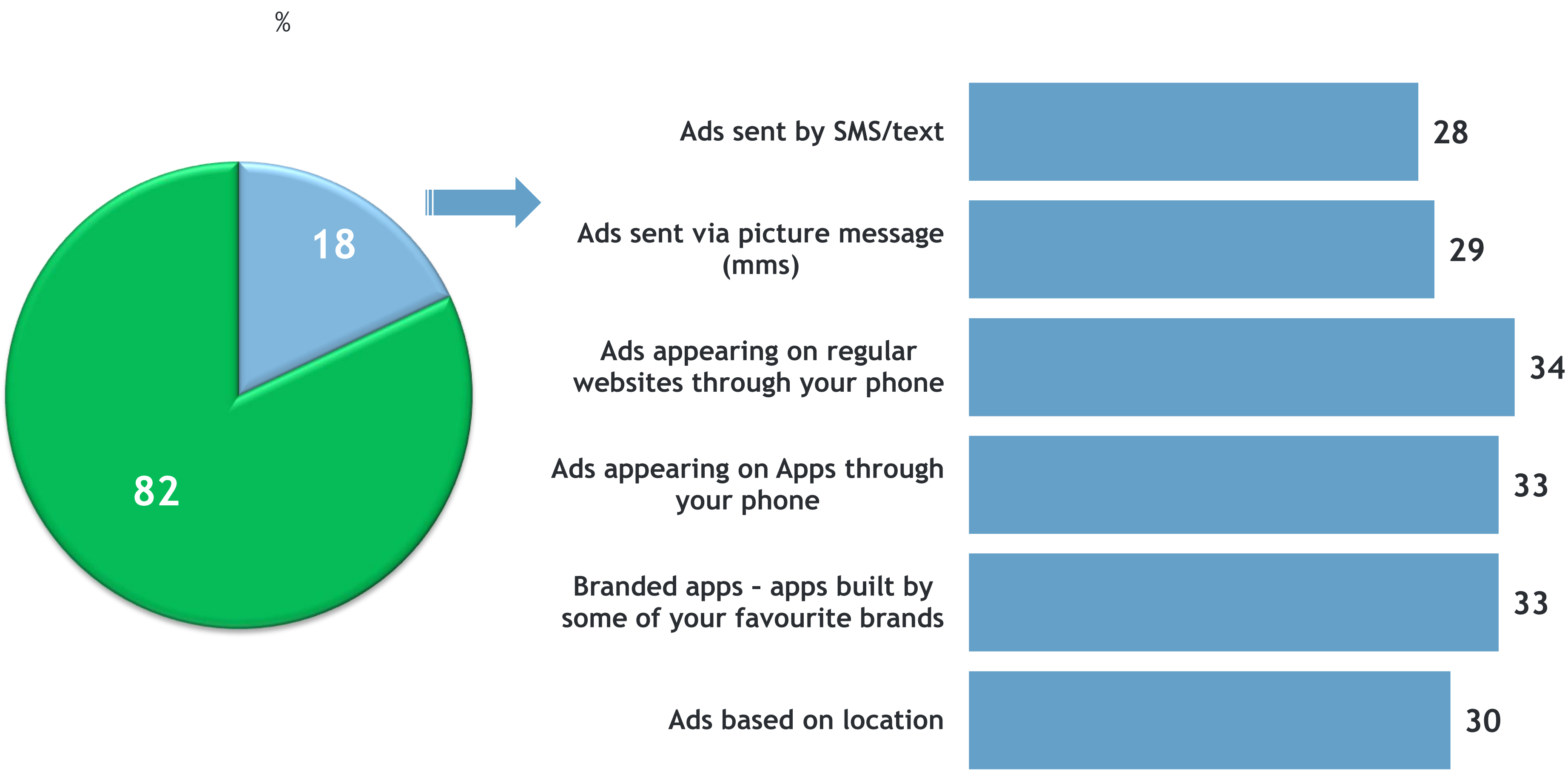
Over a quarter of all adults source online information via mobile phone (an estimated 990,000 people) with news, entertainment and travel information the most commonly searched for.

Q.8 Which of the following types of information do you ever search for online on our mobile phone?

# Mobile Discount Offers Availed of

Base: all adults (n = 1011)




**Over 600,000 people have availed of mobile phone discount offers, 80% of whom are aged 16-49 years.**

Q.9 Have you ever availed of any discount offers which you received on your mobile phone?

# Summary

# Summary

- Three-quarters of a million Irish adults now own a smartphone – an increase of over 100,000 users in just nine months. Based on last year's study, there would appear to be a realistic potential for sales of an additional 70,000-80,000 smartphones between now and next Spring.
- Users of the iphone are a little older than general smartphone users.
- Approximately 5 million apps have been downloaded in Ireland by June, 2011.
- While roughly half of all paid for apps cost less than €2, the evidence is that paid for apps represent a multi-million euro revenue stream.
- Music, games and social networking, are the most popular type of apps downloads, with sports, entertainment, news and weather also performing strongly.
- People are most receptive to mobile advertising based on location, as well as via MMS, SMS and branded apps. Interest in SMS advertising has declined, but has increased significantly for branded apps.

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# Summary

- These figures suggest there is enormous potential for mobile phone advertising in the future, with well over a million people at least open to most of the main mobile advertising channels.
- Those open to mobile phone advertising are well spread across all age groups from 16 to 49 years, and fairly evenly balanced by gender.
- Ads based on location are well received by all mobile phone advertising enthusiasts. There is also evidence of a more ‘traditionalist’ mobile advertising segment (SMS + MMS advocates).
- Over a quarter of all adults source online information via mobile phone (an estimated 990,000 people) with news, entertainment and travel information the most commonly searched.
- Over 600,000 people have availed of mobile phone discount offers, 80% of whom are aged 16-49 years.

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# Want to learn more or try it out?

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