Usage of Mobile Internet and Mobile Apps in Slovenia

Scientific background

- The study was conducted by poolpilots, an Austrian online research & IT development company, in cooperation with MindTake, an online market research agency that functioned as a panel partner.

- Timeframe: September – October 2010.

- Our study is representative in terms of sex, age and region for the Slovenian online population (71% =1,2 Mio).

- We did several datachecks in order to filter out happy clickers and recurrent respondents.

- The sample size of n=702 provides for the given population an confidence interval of +/- 3,7 % (95% probability). This is a good compromise from a research-economic view.

- Only statistics for groups of n=50+ are shown in the presentation.

- The drop-out quote was very low.

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Method & Sample

Study description	
Method	Online Survey
Field period	2010-09-13 – 2010-10-05
Sample	N=702, representative for the Slovenian online population over 14 (71% according to GFK online monitor q2 2010; about 1,2 Mio.). Sample criterias: sex, age, region; Sample provided by mindtake.

Age	
Under 20 years	5%
20 – 29 years	23%
30 – 39 years	22%
40 – 49 years	23%
50 – 59 years	17%
60 years or older	10%

Sex	
Male	50%
Female	50%

Base: n=702 (All)

Education	
Primary School	2%
Apprenticeship or other vocational schools	16%
Matura	39%
University	42%

Occupation	
employed (working man / clerk)	31%
employed (in a leading position)	12%
self employed	7%
in education (pupils)	3%
at university (students)	16%
currently unemployed (Parental leave, …) / looking for employment	8%
in military service / compulsory social service	8%
Pensioner	14%

Sample

Region	
Pomursko - Podravska	23%
Koroško - Savinjska	16%
Osrednja Slovenija in Zasavska regija	28%
JZ Slovenija (Dolenjska in Posavska regija)	11%
Gorenjska	9%
Primorska	13%

Characterisation of the own (most used) mobile device	
A fairly simple and reliable device (e.g.: Nokia 3120, Sony Ericsson K700)	45%
A classical but stylish device (e.g.: LG Chocolate)	9%
A device optimized for music or photo (e.g.: Sony Ericsson Walkmanhandy W910i, Nokia 5700)	19%
A smartphone or device optimized for business related issues with a broad feature set (e.g.: BlackBerry 8300, Nokia E71)	9%
Touchscreen Device (e.g.: Samsung Omnia, iPhone, HTC G2 Magic)	18%

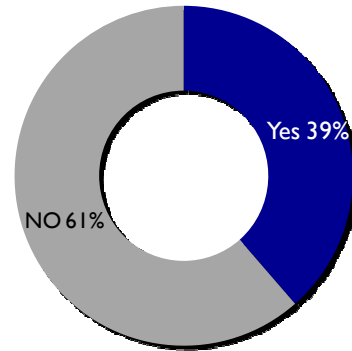| Who pays for the (most used) cell phone?	
I pay these bills completely by myself.	81%
I carry more than half of those costs on my own.	2%
Mainly, somebody else is carrying those costs.	17%

Base: n=702 (All)

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Mobile Internet Usage & Billing

Do you surf the web with your
Mobile- / smartphone?

Yes 39%

NO 61%

Base: n=702 (all)

Size of the data package

up to and including 100 MB	52%
up to and including 250 MB	4%
up to and including 500 MB	4%
up to and including 1 GB	16%
Unlimited	6%
Don't know.	18%

If yes: Is there a data package attached to your
mobile phone contract, or have you supplemented
your contract with such a package?

Yes, included.	76%
No, not included.	16%
Don't know.	8%

Base: n=271 (Mobile internet user)

Base: n=206 (data package sub.)

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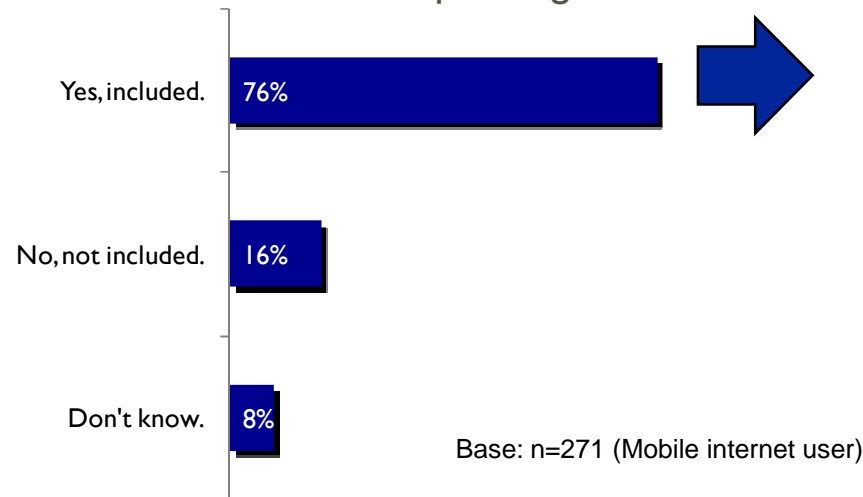
Mobile Internet User Profile

Gender chart:

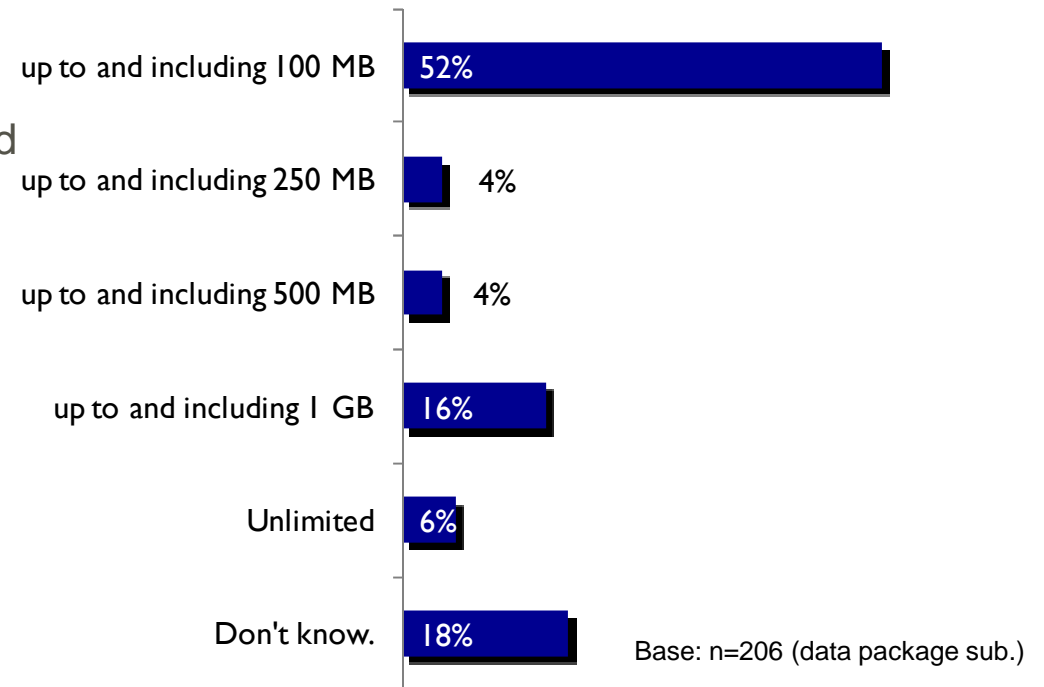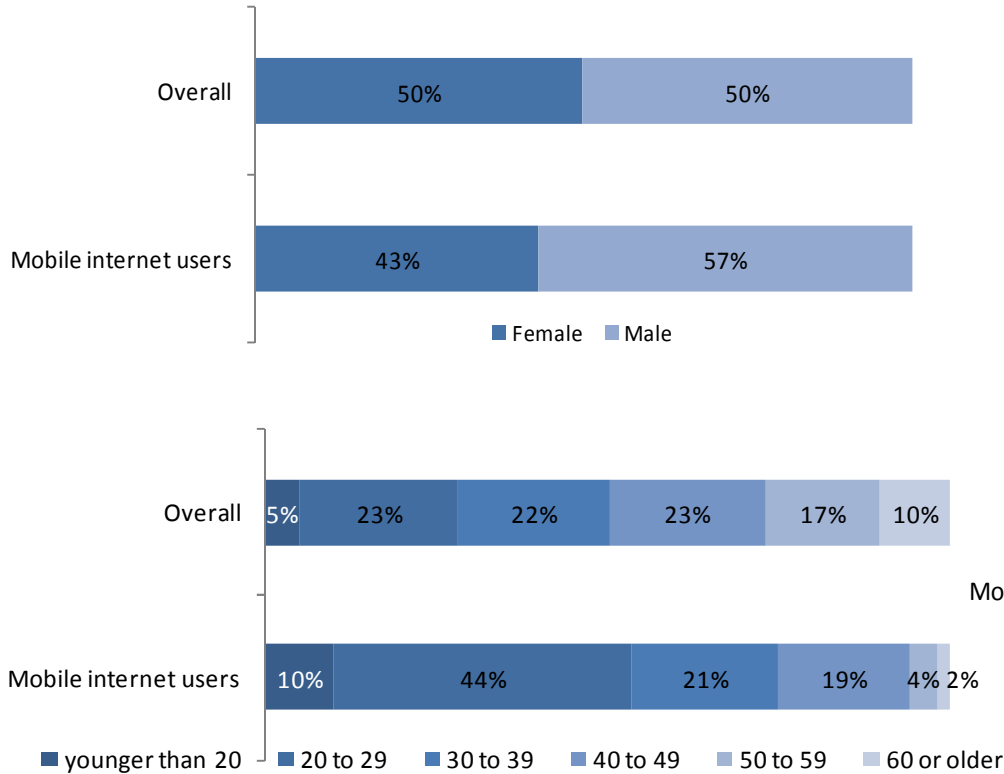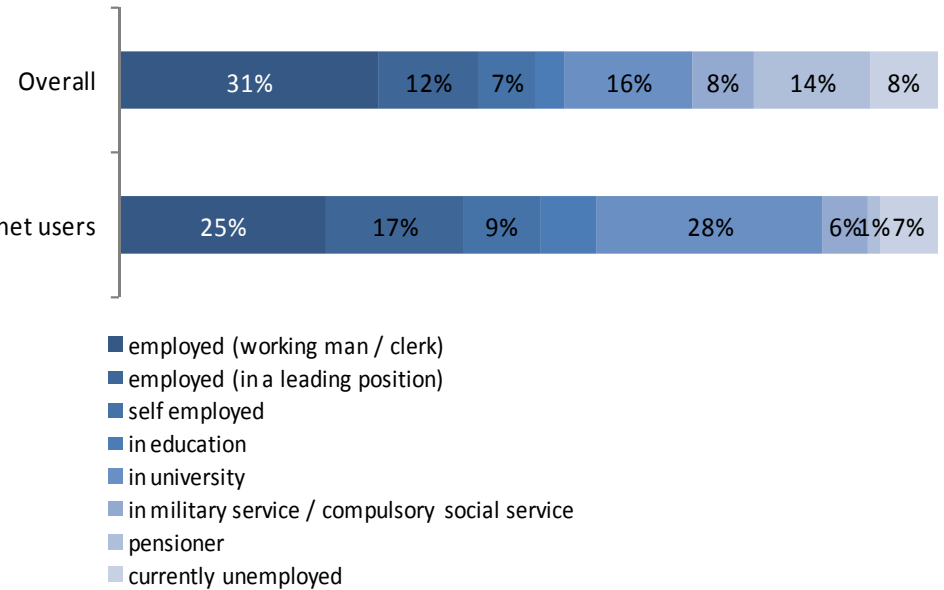|	Female	Male
Overall	50%	50%
Mobile internet users	43%	57%

Legend: ■ Female ■ Male

Age chart:

	younger than 20	20 to 29	30 to 39	40 to 49	50 to 59	60 or older
Overall	5%	23%	22%	23%	17%	10%
Mobile internet users	10%	44%	21%	19%	4%	2%

Legend: ■ younger than 20 ■ 20 to 29 ■ 30 to 39 ■ 40 to 49 ■ 50 to 59 ■ 60 or older

Mobile Internet User are mainly:

- Male
- Overrepresented in age groups up to 30
- Students

Employment chart:

	employed (working man / clerk)	employed (in a leading position)	self employed	in education	in university	in military service / compulsory social service	pensioner	currently unemployed
Overall	31%	12%	7%	16%	8%		14%	8%
Mobile internet users	25%	17%	9%	28%		6%	1%	7%

Legend:
■ employed (working man / clerk)
■ employed (in a leading position)
■ self employed
■ in education
■ in university
■ in military service / compulsory social service
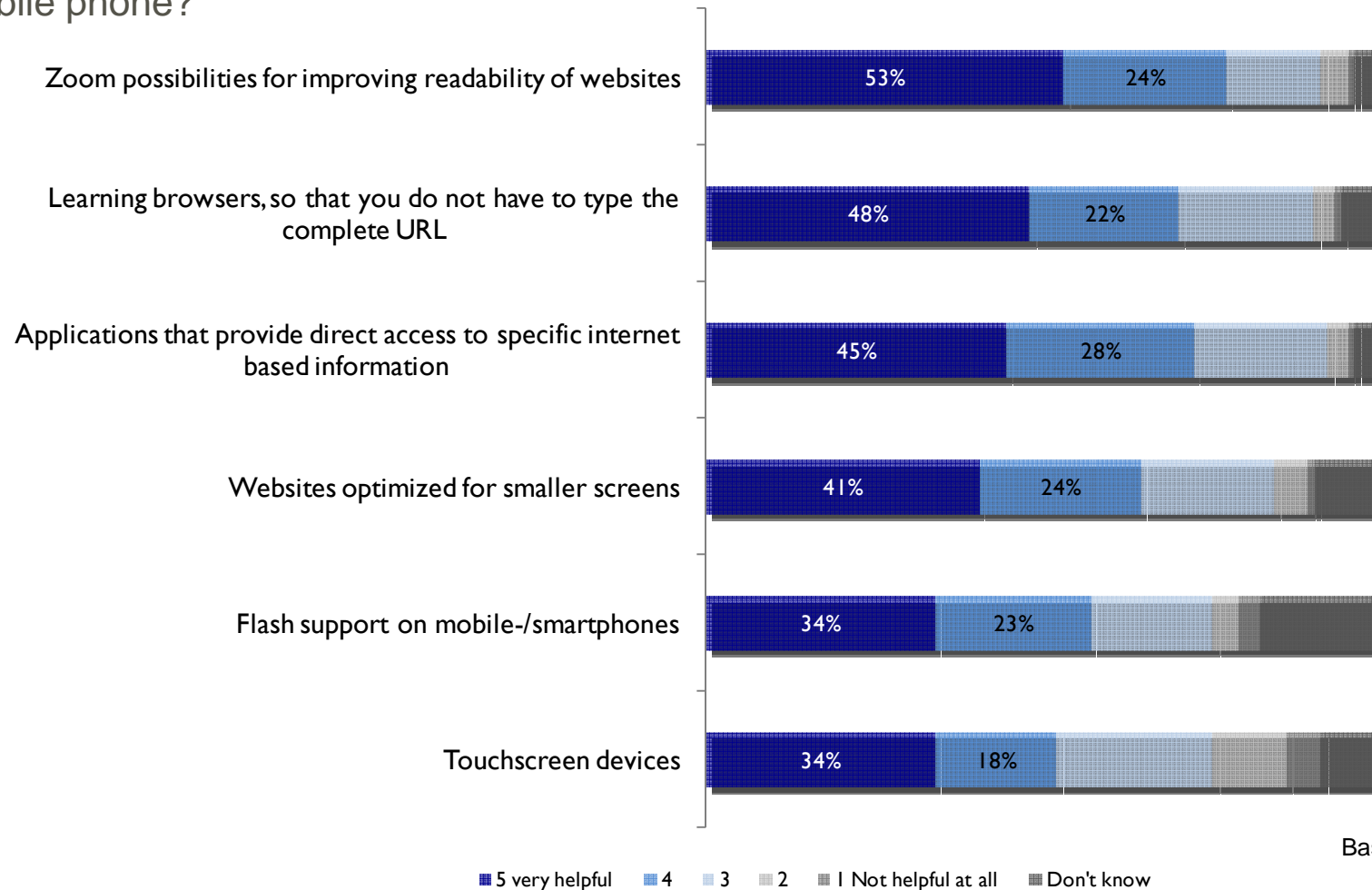■ pensioner
■ currently unemployed

Base: n=702 (all); n=271 (Mobile internet user)

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Optimization of the Internet User Experience on Mobile Phones

How helpful do you experience the following possibilities to improve the internet usage on the mobile phone?

Possibility	5 very helpful	4
Zoom possibilities for improving readability of websites	53%	24%
Learning browsers, so that you do not have to type the complete URL	48%	22%
Applications that provide direct access to specific internet based information	45%	28%
Websites optimized for smaller screens	41%	24%
Flash support on mobile-/smartphones	34%	23%
Touchscreen devices	34%	18%

Base: n=271 (Mobile internet user)

■ 5 very helpful ■ 4 ■ 3 ■ 2 ■ I Not helpful at all ■ Don't know

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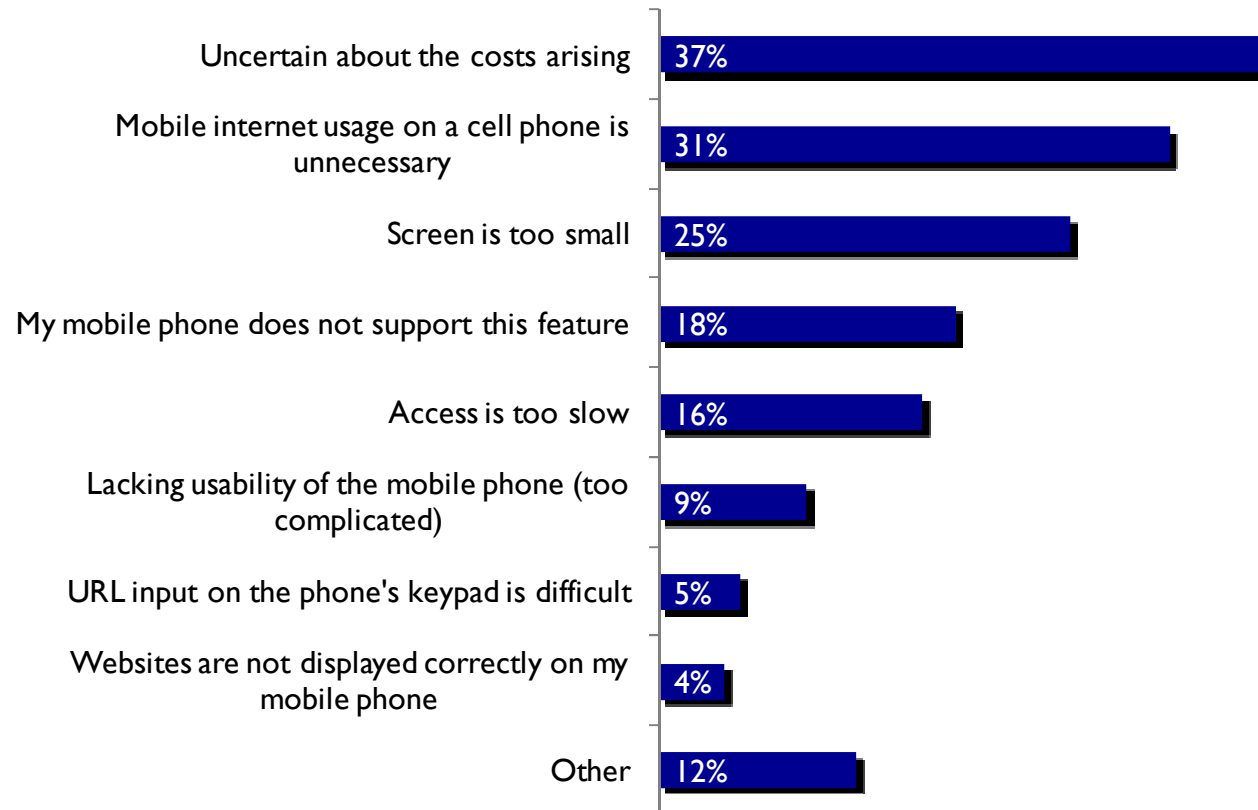OVI

Barriers for Using the Internet on Mobile- / Smartphones

Why don't you use the internet access on your mobile phone?

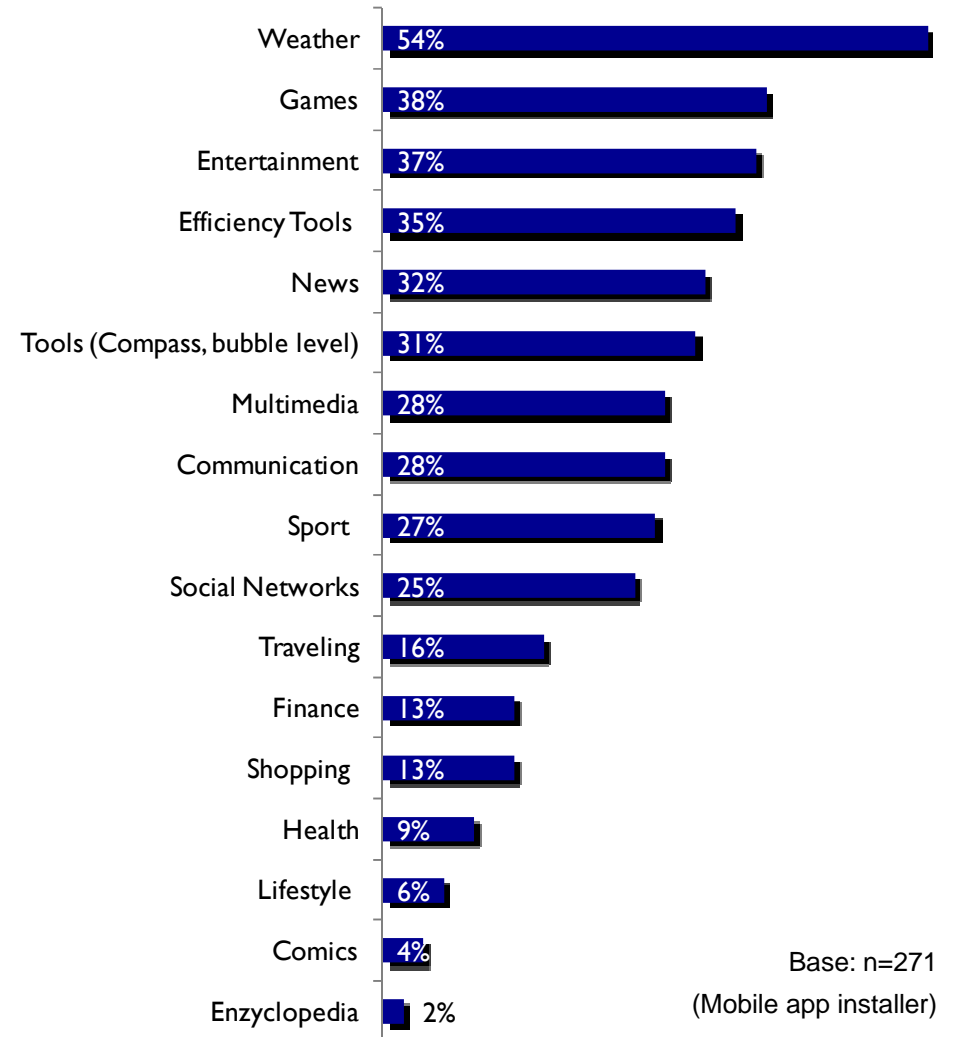| Barrier	Percentage
Uncertain about the costs arising	37%
Mobile internet usage on a cell phone is unnecessary	31%
Screen is too small	25%
My mobile phone does not support this feature	18%
Access is too slow	16%
Lacking usability of the mobile phone (too complicated)	9%
URL input on the phone's keypad is difficult	5%
Websites are not displayed correctly on my mobile phone	4%
Other	12%

Base: n=431 (non-mobile internet user)

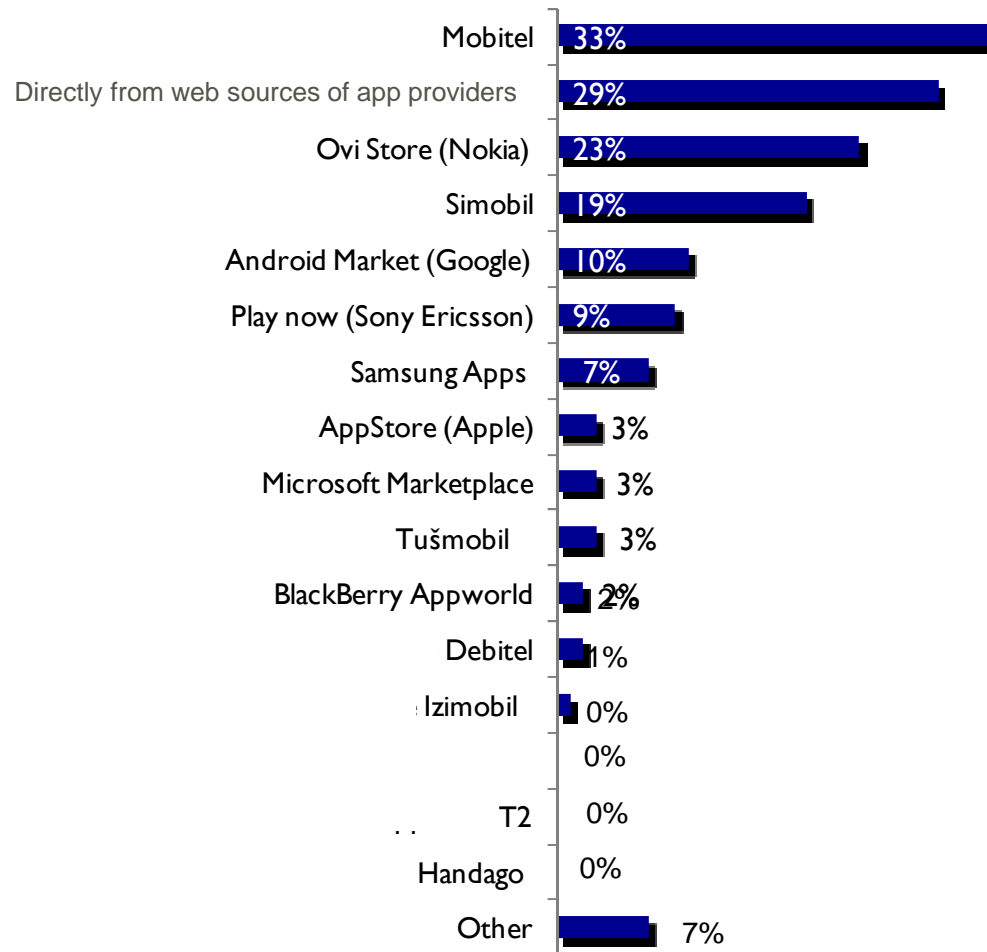NOKIA
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Usage of Mobile Apps

- 39% of all respondents already used an mobile app on their smartphone.

- On average, app users in Slovenia have currently installed approximately 15 apps.

- 18 % of the current mobile app user already bought a charged app in the past.

Favourite App Categories

Category	Percentage
Weather	54%
Games	38%
Entertainment	37%
Efficiency Tools	35%
News	32%
Tools (Compass, bubble level)	31%
Multimedia	28%
Communication	28%
Sport	27%
Social Networks	25%
Traveling	16%
Finance	13%
Shopping	13%
Health	9%
Lifestyle	6%
Comics	4%
Enzyclopedia	2%

Base: n=271
(Mobile app installer)

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Apps Sources

From what sources have you downloaded your Apps in the past?
(aided, multiple responses possible)

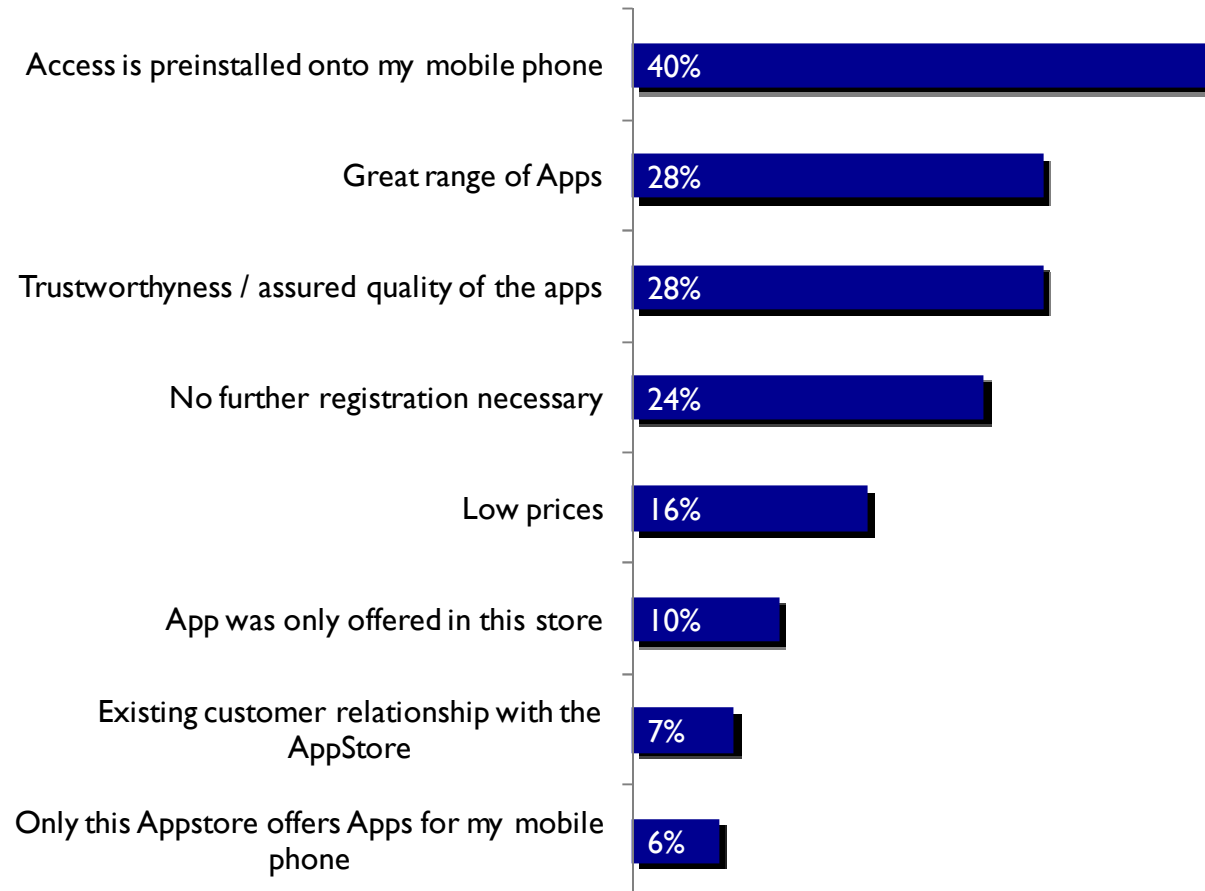| Source	Percentage
Mobitel	33%
Directly from web sources of app providers	29%
Ovi Store (Nokia)	23%
Simobil	19%
Android Market (Google)	10%
Play now (Sony Ericsson)	9%
Samsung Apps	7%
AppStore (Apple)	3%
Microsoft Marketplace	3%
Tušmobil	3%
BlackBerry Appworld	2%
Debitel	1%
Izimobil	0%
	0%
T2	0%
Handago	0%
Other	7%

Base: n=271 (Mobile app installer)

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Reasons for Using Specific App Stores

Why have you decided for a specific AppStore? (aided, multiple responses possible)

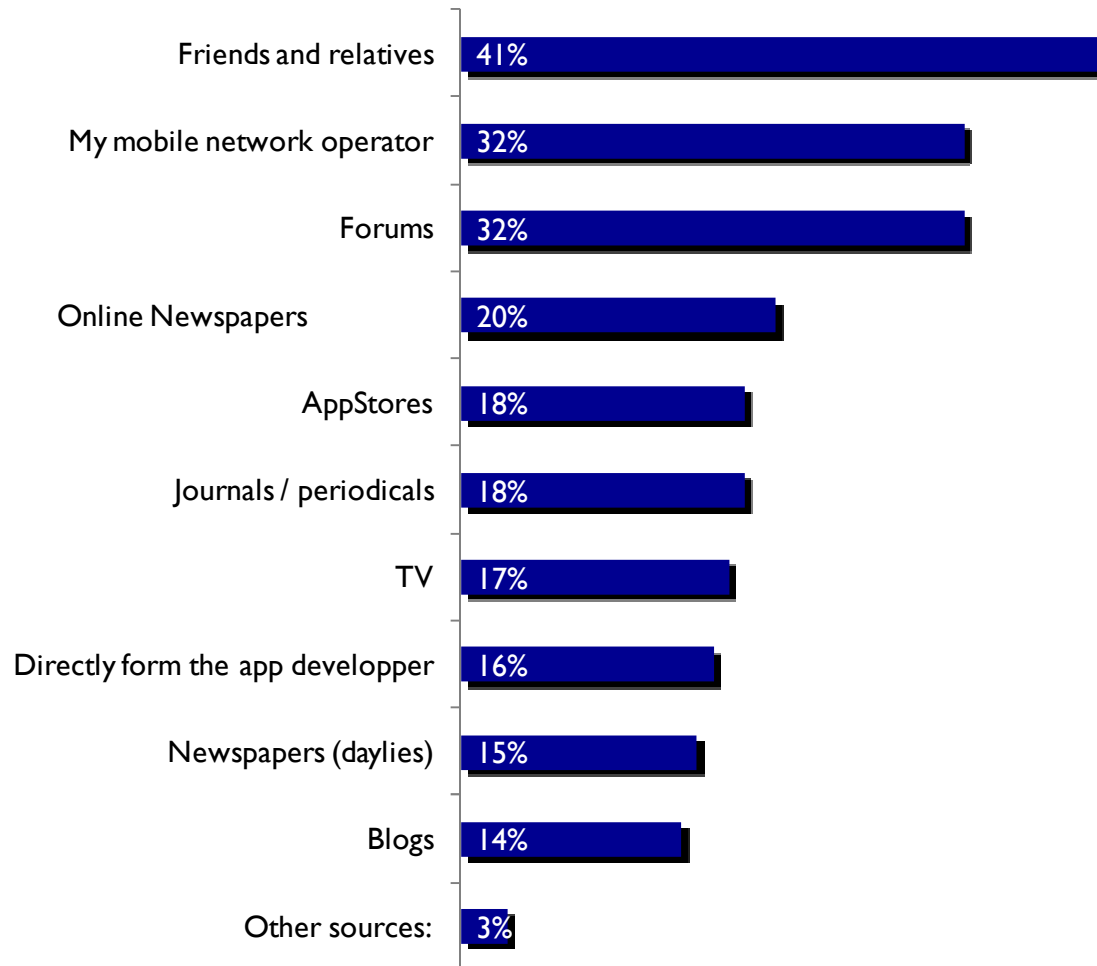| Reason	Percentage
Access is preinstalled onto my mobile phone	40%
Great range of Apps	28%
Trustworthyness / assured quality of the apps	28%
No further registration necessary	24%
Low prices	16%
App was only offered in this store	10%
Existing customer relationship with the AppStore	7%
Only this Appstore offers Apps for my mobile phone	6%

Basis: n=271 (Mobile app installer)

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Information Sources for Apps

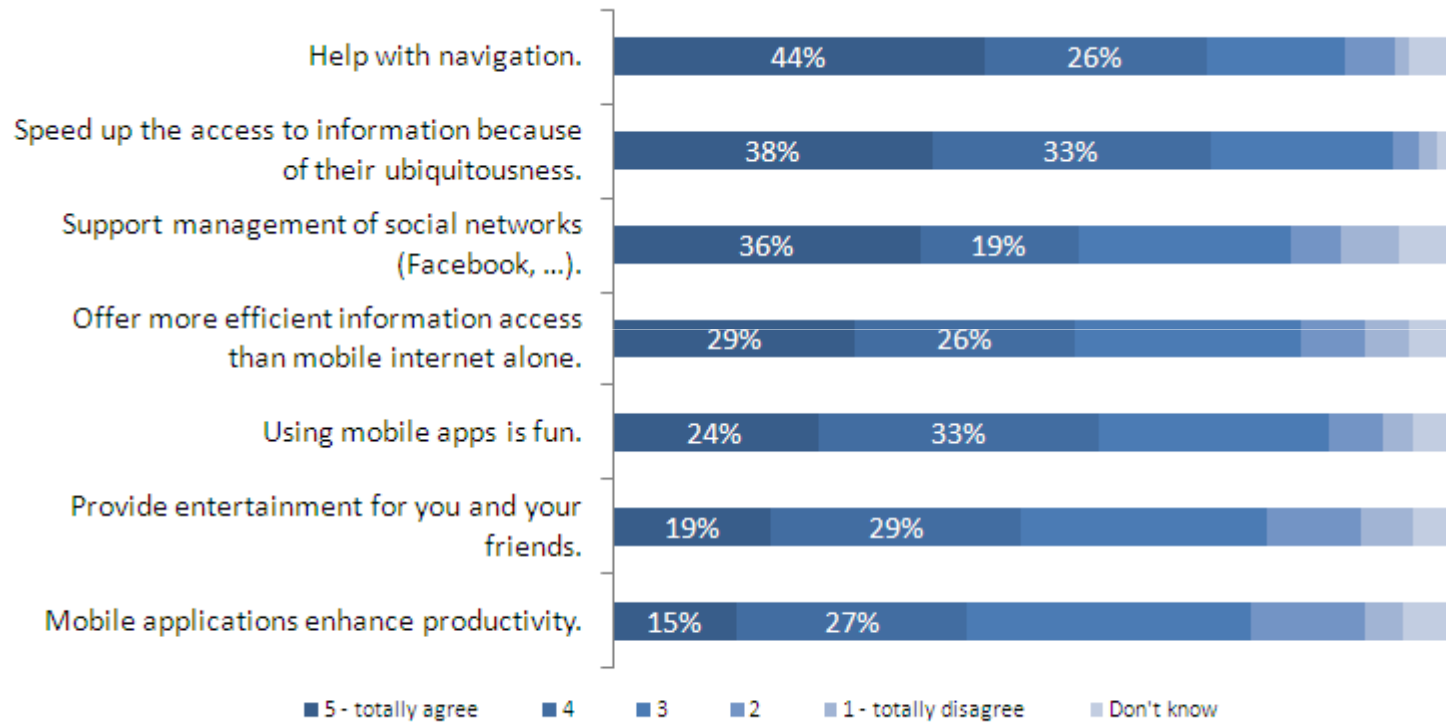What sources inform you about mobile applications? (aided, multiple responses possible)

Source	Percentage
Friends and relatives	41%
My mobile network operator	32%
Forums	32%
Online Newspapers	20%
AppStores	18%
Journals / periodicals	18%
TV	17%
Directly form the app developper	16%
Newspapers (daylies)	15%
Blogs	14%
Other sources:	3%

Base: n=271 (Mobile app installer)

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Reasons for Apps Usage

What benefits do you see in using mobile apps? (Please rate the following statements)

Statement	5 - totally agree	4
Help with navigation.	44%	26%
Speed up the access to information because of their ubiquitousness.	38%	33%
Support management of social networks (Facebook, ...).	36%	19%
Offer more efficient information access than mobile internet alone.	29%	26%
Using mobile apps is fun.	24%	33%
Provide entertainment for you and your friends.	19%	29%
Mobile applications enhance productivity.	15%	27%

Legend: ■ 5 - totally agree ■ 4 ■ 3 ■ 2 ■ 1 - totally disagree ■ Don't know

Base: n=252 (current mobile app user)

App Wishes by Brands #1

BRAND	%	INDUSTRY	TOP 3-5 APP IDEAS/CONTEXT
Meteorološki zavod Sloveni	36%	Goverment	weather reports and forecast, fresh news about weather in Slovenia
AMZS	28%	Transport	information- road conditions, roadside assistance, quick info
POP TV	25%	Media	news, TV listings, latest news
NLB	20%	Finance	bank account balance check, info about NLB Klik, information about exchange rate
Mimovrste	19%	Electronics	offer, prices, discounts,
Davčna uprava Slovenije	17%	Goverment	info- taxes,legislative changes, tax liabilities,overview - tax obligations
Slovenske železnice	17%	Transport	train timetable, info about delays and disruptions
Turistična zveza Slovenije	16%	Tourism	touristic info- offer in Slovenia and abroad, prices, excursions and new travel packages
Žurnal	14%	Media	news
Mercator	13%	Trade	information-(discounts, sales actions)
Big Bang	13%	Electronics	information-(discounts, sales actions), information -products and prices, online shopping
LPP	12%	Transport	information-timetable- arrival and departure of the buses
Kulinarična Slovenija	12%	Gastronomy	Recipes, list of recommended restaurants
KANAL A	10%	Media	TV listings
Delo	10%	Media	news (daily, breaking news)
Časopis finance	10%	Media	financial news, articles,

Base: n=702 (All)

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App Wishes by Brands #2

BRAND	%	INDUSTRY	TOP 3-5 APP IDEAS/CONTEXT
Tuš	9%	Trade	information-(discounts, sales actions)
Zavarovalnica Triglav	9%	Insurance	information-(insurance policies, news and informative calculation)
Abanka	8%	Finance	information- bank account balance check
Comshop	7%	Electronics	information -offer, prices, discount
SKB	6%	Finance	bank account balance check, info about SKB-net
McDonalds	6%	Gastronomy	offer- prices, new menu
Merkur	4%	Electronics	information-(offers, discount and prices)
Elektro Ljubljana	4%	Energy	information -(electricity meter counter; cost calculator)
Zavarovalnica Maribor	4%	Insurance	information - conditions, offers, calculation
Harvey Norman	4%	Electronics	offer, price, discounts
Adriatic Slovenica	3%	Insurance	information -conditions, offers, calculation
Elektro Maribor	2%	Energy	electricity costs, online access to accounts
Gen-I	2%	Energy	electricity-costs, information - used electricity
Droga Kolinska	1%	Trade	information- prices and discount

Summary

- Already 39% of the Slovenian online population (fixed net) is currently using their phone/smartphone for surfing the internet.

- The typical mobile internet user is male and younger than 30. Students and employees in leading positions are overrepresented among the mobile internet surfers.

- 3 out of 4 mobile internet users have already a data package included in their tarif plan.

- Main reasons for not using the internet via cell phones are the uncertainty about arising costs and the impression that there is no need.

- Nearly 40% of all respondents have made first experiences with mobile apps.

- Overall – the network providers' app stores are very well known and often used. Weather is the most popular app category, followed by Games and Entertainment.