



MOOSYLVANIA

MOOSE TRACKER MOBILE APP CHECK

DECEMBER 2010

IT'S ALL ABOUT THE APPS, OR IS IT?

It's been a great year for technology bragging rights.

First the iPad became the status symbol of 2010. Now the word "app" has found its place in mobile phone commercials whose competitive advantage are great 4G connections "for your favorite apps."

So, as marketers, we should focus on apps, right? Or is the hype greater than the apps themselves? At Moosylvania, we decided to field a survey to find out.

Before you create an app or place advertising on one, read on to find out who uses them and why, plus what makes an app a "favorite."

For more information and slices of data, please contact:
Norty Cohen, CEO, Moosylvania, 314-644-7900.
View <http://tracker.moosylvania.com> for a library of 700+ social and mobile case studies.

METHODOLOGY

IN OCTOBER 2010, MOOSYLVANIA COMMISSIONED GREAT QUESTIONS, LLC TO FIELD A NATIONAL CONSUMER RESEARCH SURVEY WITH THE FIRST CHOICE FACILITIES RESEARCH NETWORK, SURVEYING CONSUMERS ON THEIR SMARTPHONE USAGE.

- Topics included free vs. paid apps, favorite apps, mobile web, making mobile purchases and mobile advertising
- 3,500 male and 3,500 female respondents
- Results are incorporated into an ongoing survey site, <http://tracker.moosylvania.com>, which catalogs 700+ mobile and social case studies

RESEARCH PARTNERS:

Survey design and analysis by Great Questions, LLC
Survey management by Hatch Global Research, St. Louis

Survey markets:

First Choice Facility Network members:

Superior Research in Atlanta
Copley Focus Centers/National Field & Focus Boston
Focuscope, Inc in Chicago
Dallas By Definition in Dallas
Trotta Associates in Los Angeles/Orange County
Ask Miami in Miami
Reckner Associates in Milwaukee
Reckner Associates in Philadelphia
Reckner Associates in White Plains
Focus Market Research in Minneapolis
Focus Market Research in Scottsdale
Gilmore Research in Portland
Gilmore Research in Seattle
Fleischman Field Research in San Francisco
Hatch Global Research in St Louis

Additional support by:

Focus Crossroads in East Rutherford, NJ



▼ OBSERVATIONS

- 1 Apps can be an incredible brand experience and provide a level of connectivity with consumers not seen since desktop icons were the rage. The challenge is that phones are like desktops - consumers only have mindshare for 10 to 30, on average.
- 2 There are 300,000 apps available that can be found on the majority of platforms - and out of those, a handful of apps completely dominate - leaving 299,900 fighting for an audience.
- 3 It takes tremendous functionality, usability and media to get adoption - or just a fluke of luck - but it's really hard to get into the top 10.
- 4 App development requires minimally three platforms - Android, iPhone/iPad and Blackberry - over 90% of the smart phone circulation in the US. Beyond development costs, budgets need to account for on-going development and technology updates.
- 5 Selling apps reduces consumer adoption significantly, as the vast majority of consumers say most of their apps were free.
- 6 Offering an app may be for vanity - it may be for publicity - or it may be to truly deliver something special to a unique audience - but it's probably not a mass marketing strategy.



OBSERVATIONS

- 7 About half of consumers are using the mobile web as much as they're using apps - so marketers should be very clear what they're trying to achieve when deciding which approach to take.



APPS

- A highly engaging user interface that can create an immersive experience by leveraging smartphone technology
- Excitement and buzz that can deliver PR value
- Existing marketplace and review sites can help drive awareness
- Installation delivers implicit opt-in for future communication

MOBILE WEB

- Potentially more cost efficient when the dissemination of information is the primary objective
- Plug-ins for popular content management systems (such as Wordpress) allow traditional sites to be mobile enabled almost instantly
- Supports SEO
- One build for all - development does not require multiple platforms

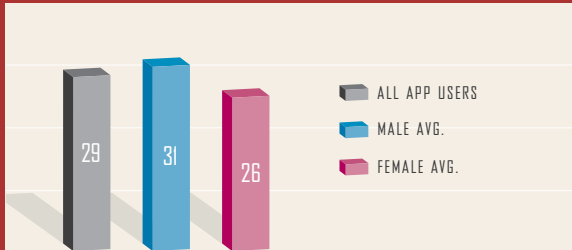


RESULTS



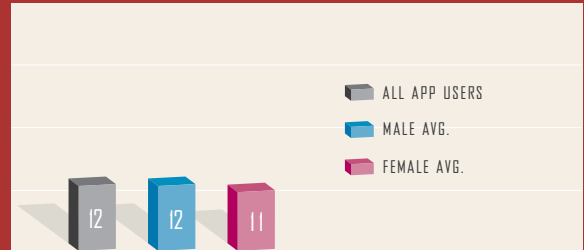
30 APPS ARE THE NORM PER PHONE BUT MOST PEOPLE USE ONLY 10-12 REGULARLY

NUMBER OF APPS



APPROXIMATELY HOW MANY APPS ARE ON YOUR SMARTPHONE PRESENTLY?

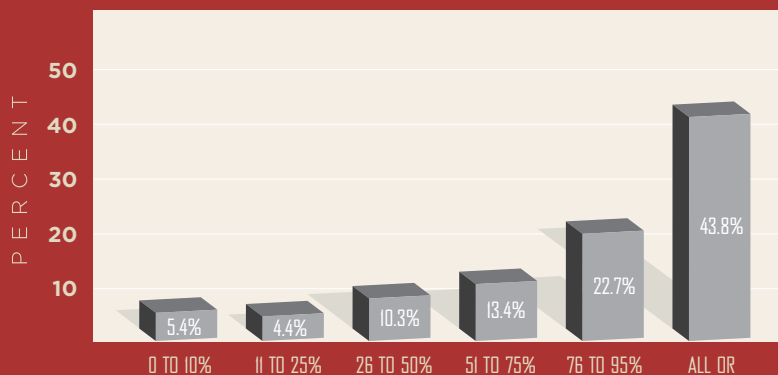
- 80% of all respondents with smartphones use apps.
- Males are more likely to use apps – 85% of men and 75% of women use apps.
- Those 25 and younger index highest in app usage at 88%, and usage decreases gradually to 65% of those 61 and older.



APPROXIMATELY HOW MANY APPS DO YOU ACTIVELY USE, AT LEAST ONCE A WEEK?

- In general, smartphone owners tend to actively use fewer than half of the apps on their phones.
- Males average approximately 31 apps on their smartphones and actively use about 12 of them. On average, females have about 26 apps on their phones and actively use about 11 of them.

EVERYONE LOVES FREE

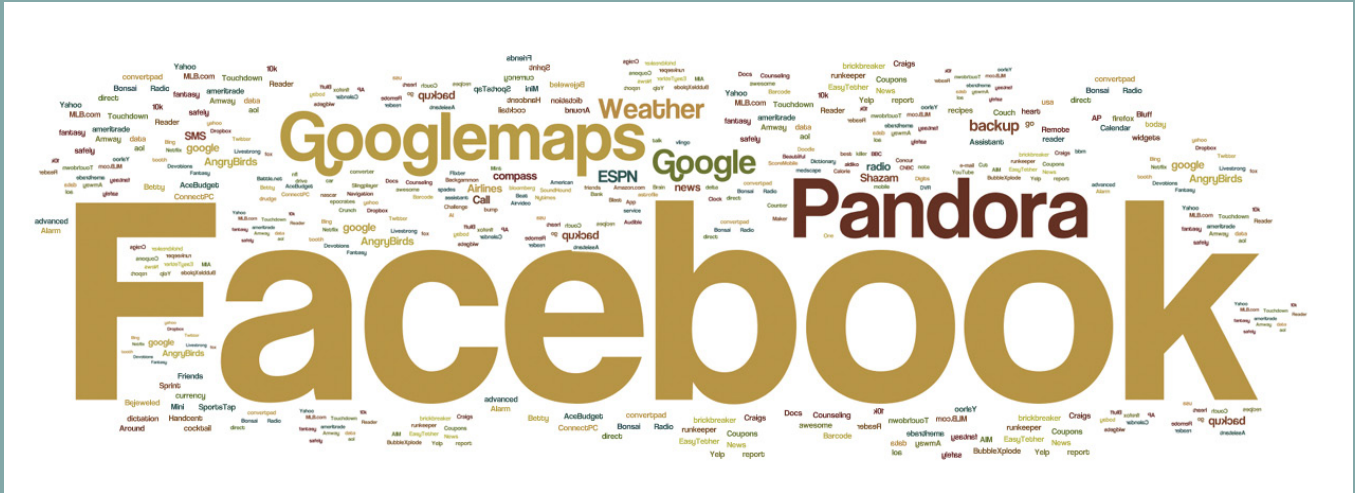


APPROXIMATELY WHAT PERCENTAGE OF YOUR APPS WERE FREE?

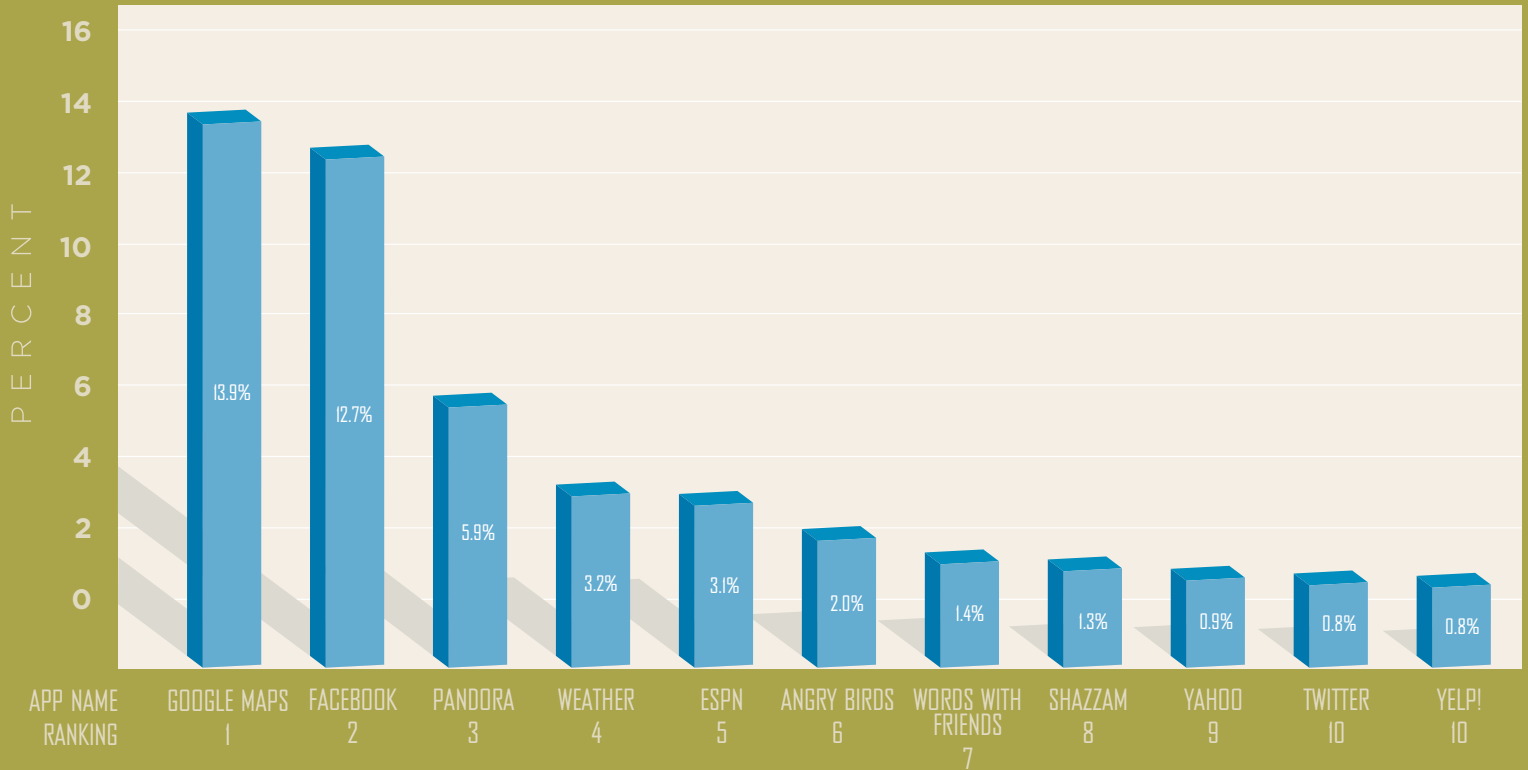
- 44% of all app users indicate that all or nearly all of their apps were free.
- Females are more likely to have more free apps – 52% of women indicated all or nearly all of their apps were free, versus 38% of males.



THERE'S A TOP 10 AND THOUSANDS OF DISTANT RUNNERS UP



TOP 10 FAVORITE APPS FOR MALES



"I drive a lot, and it comes in handy when trying to find the fastest route to where I'm going," • "It's a portable GPS," and because • "I get lost a lot."



"24/7 access to friends and group activities," • "I can keep up with my friends while I am on the go," • "I can stay connected with my friends and family," and it's • "Easy and quick to use."



To request a complete list of Apps men included as favorites **CLICK HERE.**

WHY?

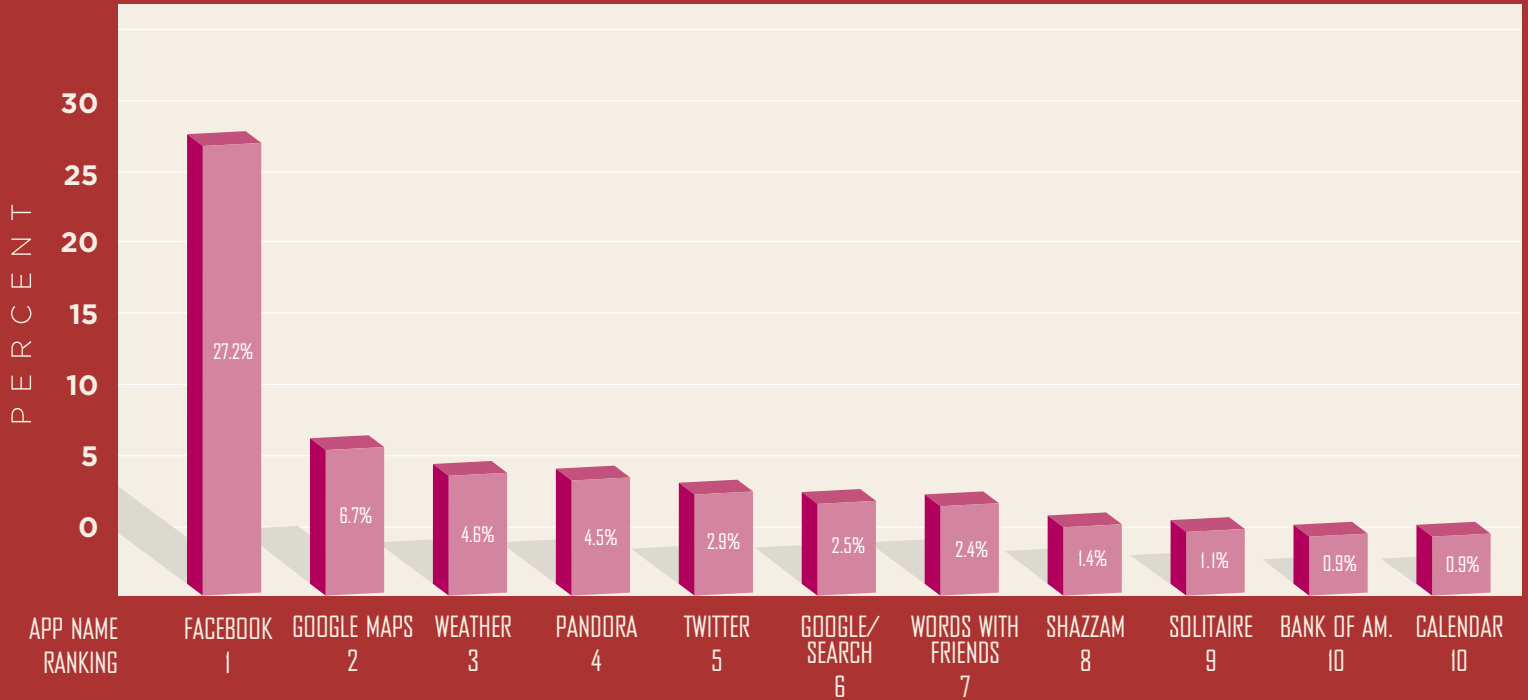
"It's a great way to listen and discover new music," • "Variety of music," and • "I have an ever-changing selection of music when driving."




THE TOP APPS AMONG MALES ARE GOOGLE MAPS/GPS OR NAVIGATION APPS (NAMED AS FAVORITE BY 14%), FACEBOOK (A FAVORITE OF 13%) AND PANDORA (CITED BY 6%).



TOP 10 FAVORITE APPS FOR FEMALES



"I can connect with my friends from anywhere,"
 • "I can check updates and update my status faster than going online," • "I don't have to have a PC to check my Facebook," and it • "keeps me looped into the social network."




"It gets me where I'm going,"
 • "Provides directions based on current location," and • "It's the best turn-by-turn navigation I have found to date."



To request a complete list of Apps women included as favorites **CLICK HERE.**

WHY?

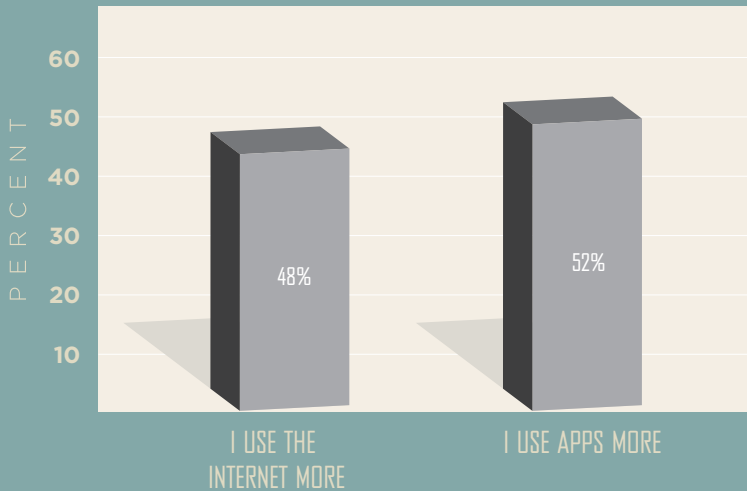
"It helps me make plans for the day or week, based on the weather," • "I use it every morning before I dress for the day," and • "Wherever I'm traveling, the app provides current and forecasted weather conditions."




FOR FEMALES, THE #1 FAVORITE APP IS FACEBOOK, CITED BY 27% OF RESPONDENTS, FOLLOWED BY GOOGLE MAPS/GPS OR NAVIGATION WITH 7% AND AT #3, WEATHER APPS WITH 5%.



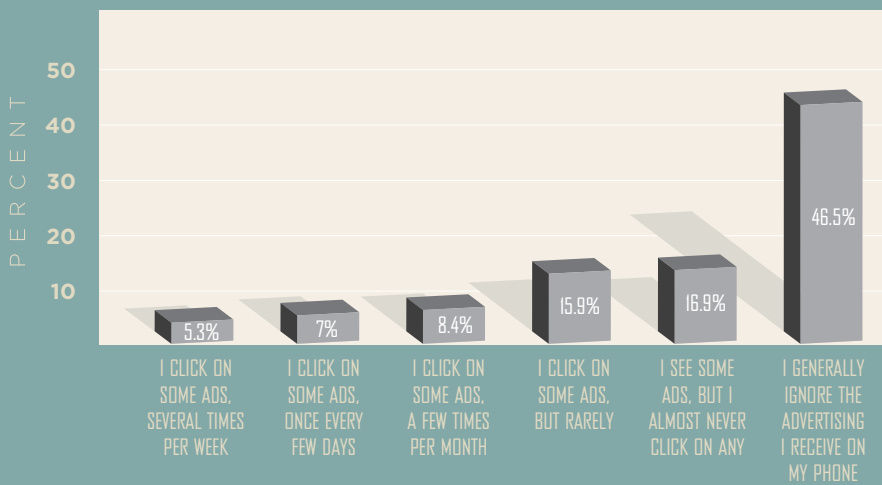
MOBILE WEB USERS = APP USERS



Despite the popularity of the many apps mentioned by app users, almost half said they use the internet more than apps on their smartphones, making a mobile website a viable and, in some cases, more cost-efficient option to consider.

WHICH DO YOU USE MORE ON YOUR SMART PHONE-THE INTERNET OR APPS?

CLICK-THROUGH ADS ON PHONES ARE PRETTY LONELY



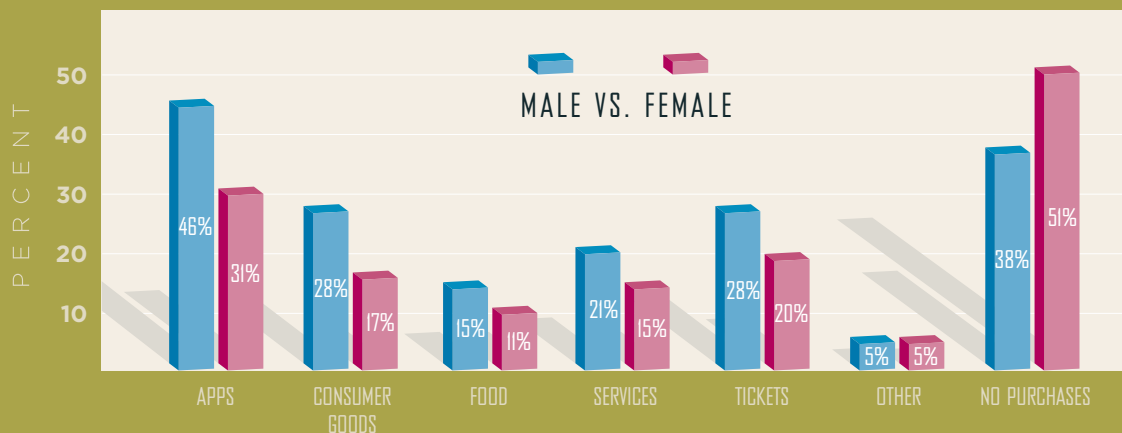
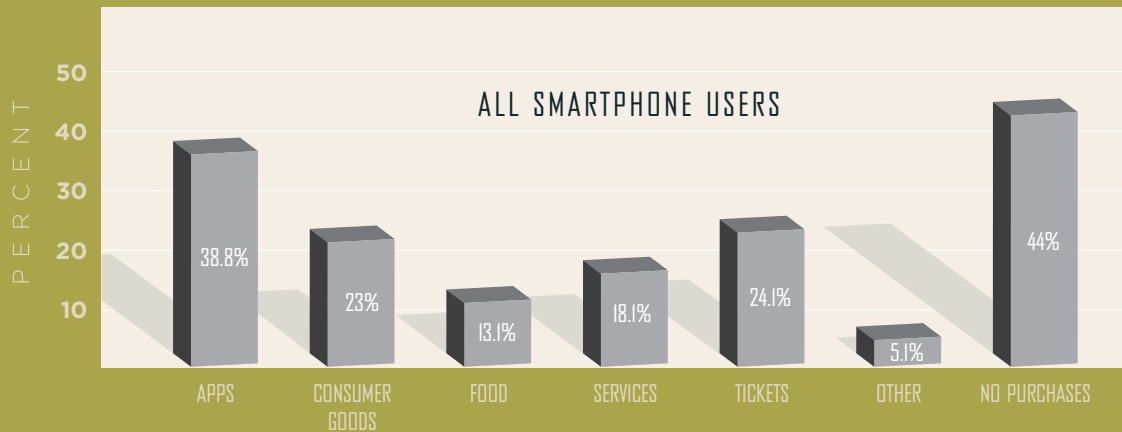
WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU RESPOND TO ADVERTISING YOU RECEIVE ON YOUR PHONE?

When considering whether to advertise on an app be aware **nearly half** of smartphone users said they generally ignore the advertising they receive on their smartphones, and another **17%** said they see some ads, but almost never click on them.

- 46% of smartphone users indicate that they generally ignore the advertising they receive on their phones.
- 69% of females and 59% of males say they almost never click on or generally ignore ads on their smartphones.
- 55% of smartphone users 51 and older say they generally ignore the advertising they receive on their smartphones, and it drops to 47% or fewer of those 50 and younger.



APPS LEAD FOR PURCHASES MADE USING PHONES



WHICH OF THE FOLLOWING, IF ANY, HAVE YOU PURCHASED USING YOUR SMART PHONE IN THE PAST MONTH?



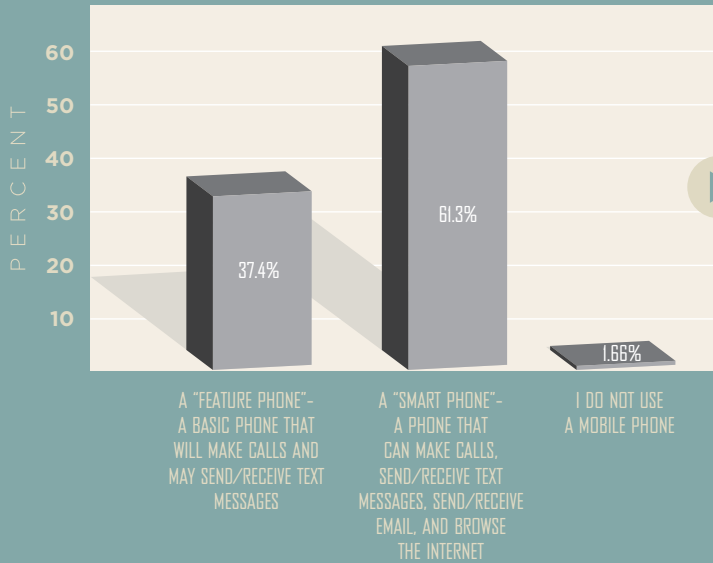
- For every category of item surveyed, males are more likely than females to have made a purchase with their smartphone.
- 49% of females and 62% of males have made a purchase with their smartphone.
- The most popular categories of purchases are apps, tickets and consumer goods.



APPENDIX

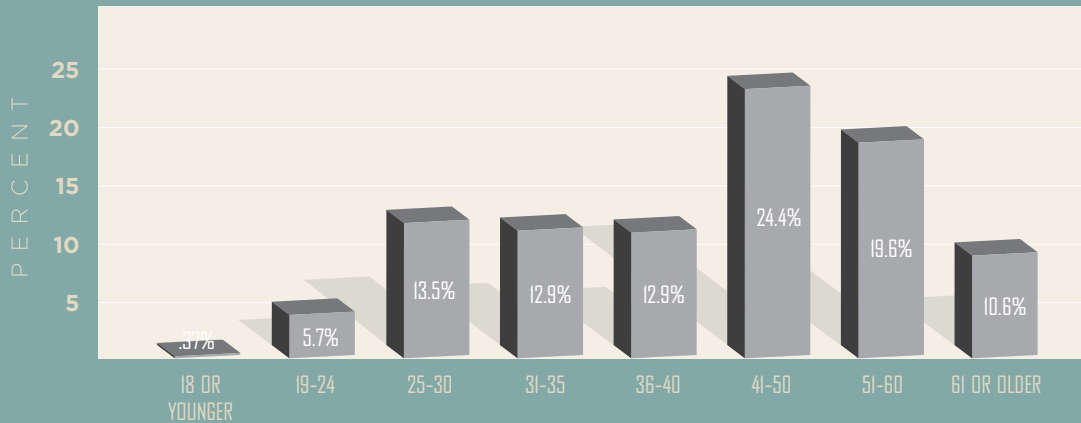


TYPE OF MOBILE PHONE

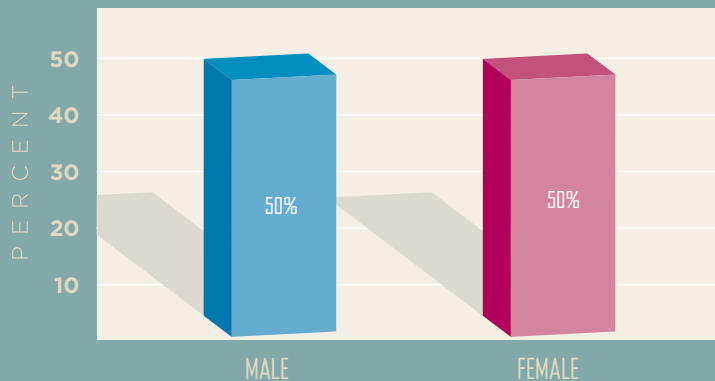


- 61% of all respondents use a smartphone.
- 57% of females use a smartphone, while 66% of males use a smartphone.
- Over 70% of respondents 40 or younger use a smartphone, while fewer than 60% of those aged 41 and older use a smartphone.
- Single and married respondents are least likely to use a smartphone, at 59% and 58% respectively, while 71% of those who are casually dating or in a committed relationship use a smartphone.
- Respondents with children under 18 are more likely to use a smartphone, with 66% of them using smartphones, versus 59% of respondents without children under 18.
- 63% of respondents with a household income greater than \$50,000 use a smartphone, versus 57% of respondents with incomes less than \$50,000.

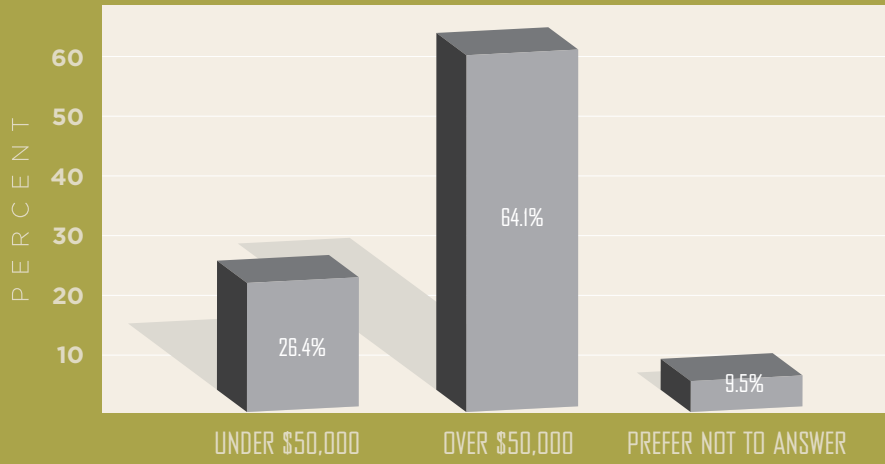
AGE



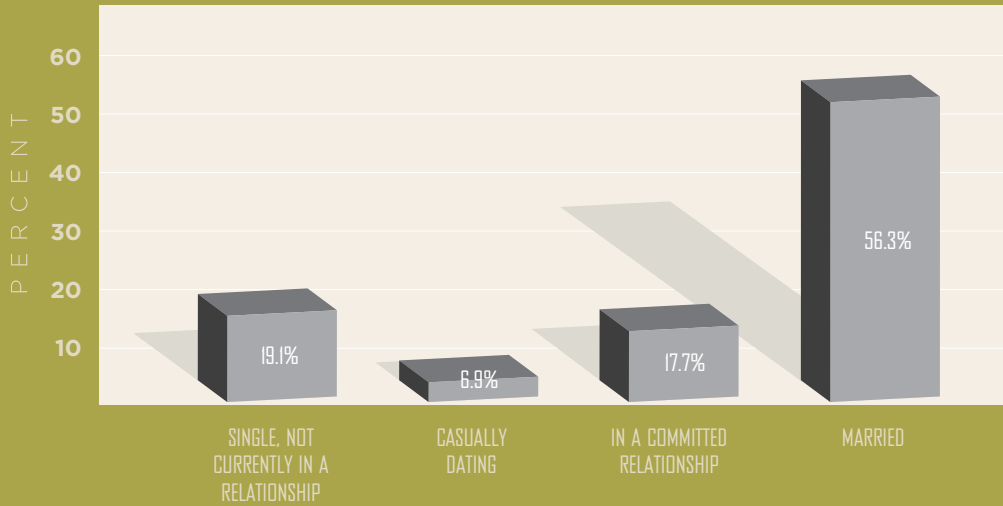
GENDER



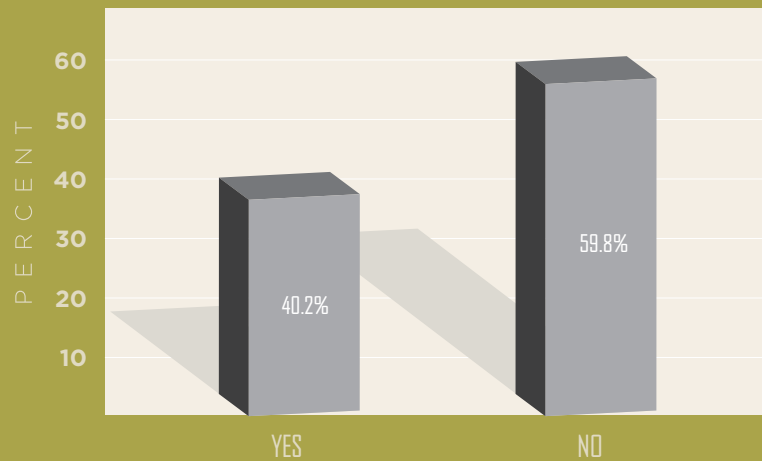
HOUSEHOLD INCOME



RELATIONSHIP STATUS



CHILDREN UNDER 18





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