GfK Verein

Everything, everywhere – and all the time? Mobile communication in Europe 2014

Results from 9 countries

GfK Verein 2014

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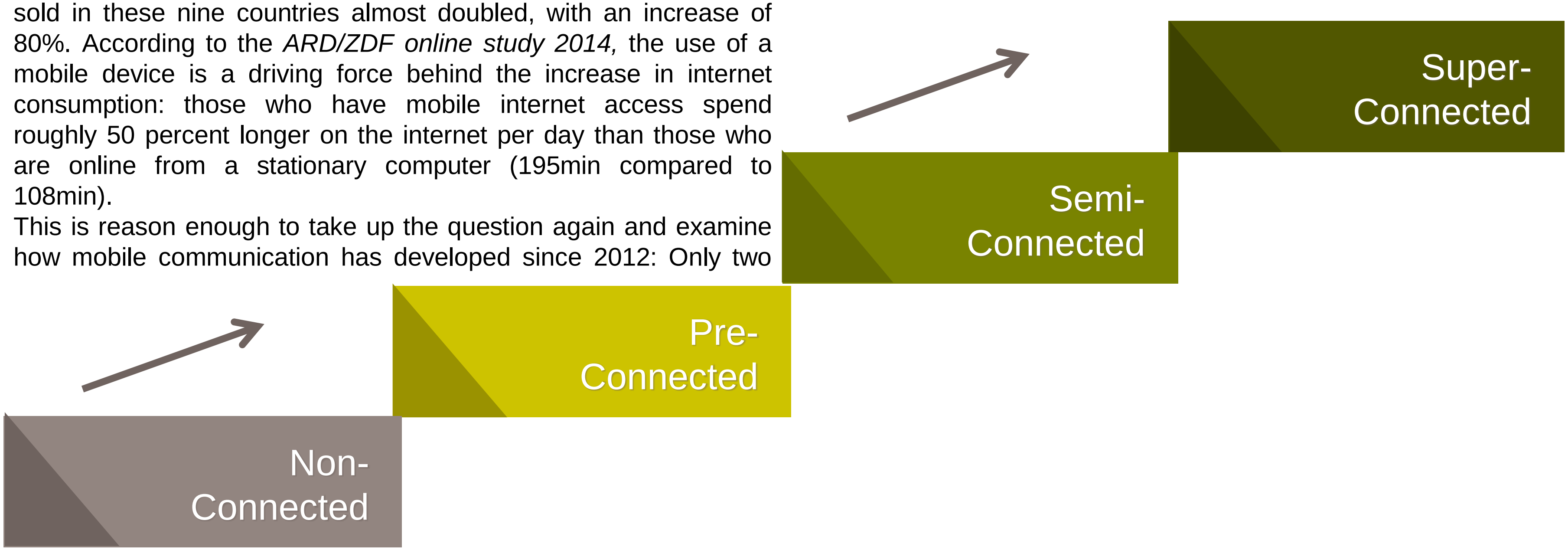
1. Introduction

The 2012 GfK conference dealt with the question **"Mobility, Communication and Consumption: Everything, Everywhere and all the time?"** A multinational study in Europe showed what separated the avant-garde mobile internet users from the mainstream in the different European markets: in 2012 mobile phones and smartphones had already become an important means of everyday communication for two thirds of consumers in the nine European countries included in the study. For one in six consumers mobile internet was already an indispensable part of their everyday life – they were "super-connected".

If we look only at the sales of mobile devices with internet use, it becomes clear that users' behaviour must also have changed: between 2011 and 2013 the number of smartphones and tablets sold in these nine countries almost doubled, with an increase of 80%. According to the *ARD/ZDF online study 2014,* the use of a mobile device is a driving force behind the increase in internet consumption: those who have mobile internet access spend roughly 50 percent longer on the internet per day than those who are online from a stationary computer (195min compared to 108min).
This is reason enough to take up the question again and examine how mobile communication has developed since 2012: Only two years later almost every second person in these nine countries can be seen as being at least "semi-connected", i.e. practical use regardless of location and time, the ability to communicate with others and the availability of internet on the go are now essential in the lives of European consumers. On the following pages you will learn the meaning of **mobile evolution** and how it is represented in Europe.

Ronald Frank
GfK Verein



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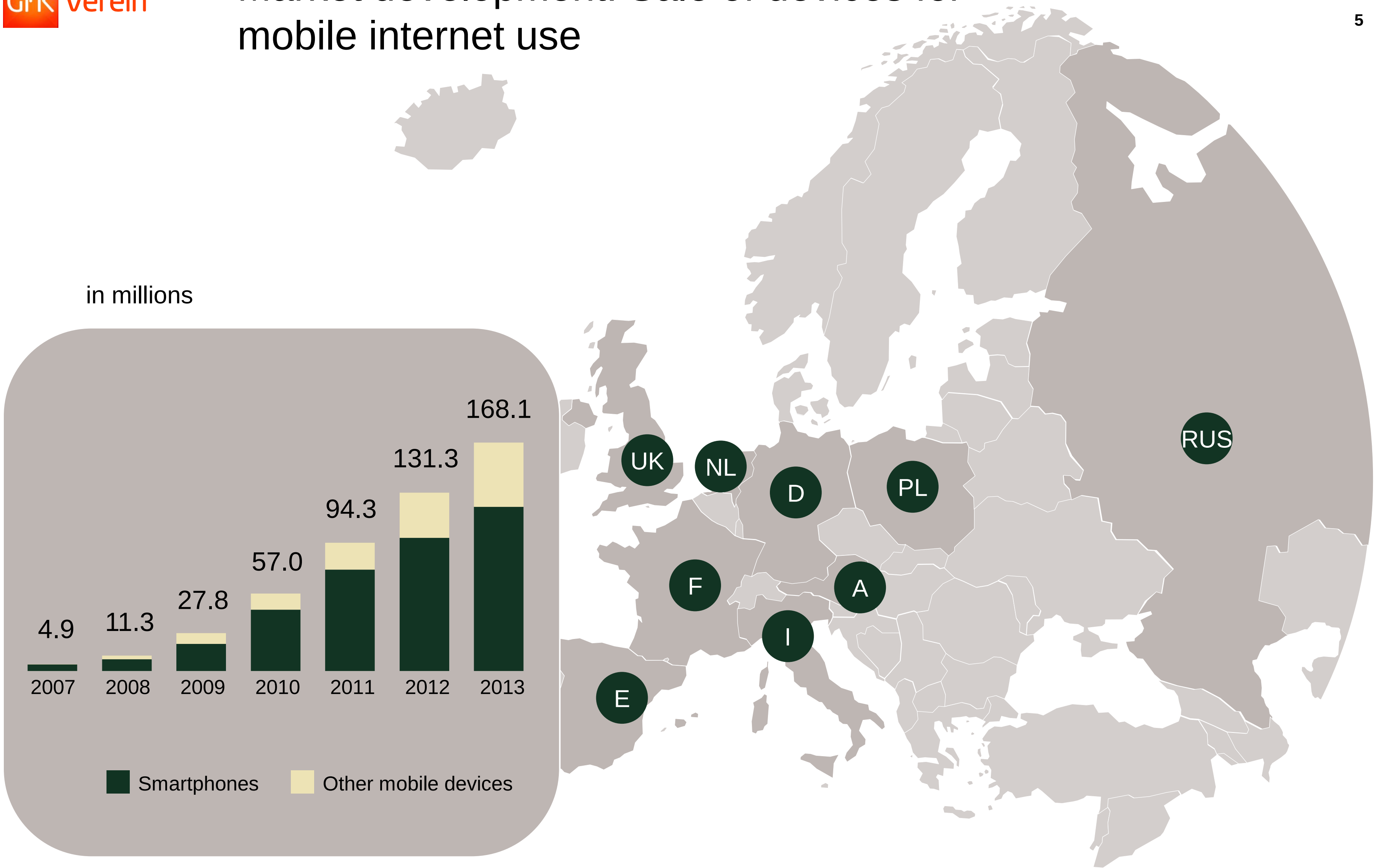
Market development: Sale of devices for mobile internet use



Source: GfK Consumer Choices; Sales Units Smartphones, Netbooks, Media Tablets, January to December of the respective year accumulated in Germany, France, Spain, Austria, Poland, Italy, the Netherlands, UK, Russia

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Mobile communication in Europe

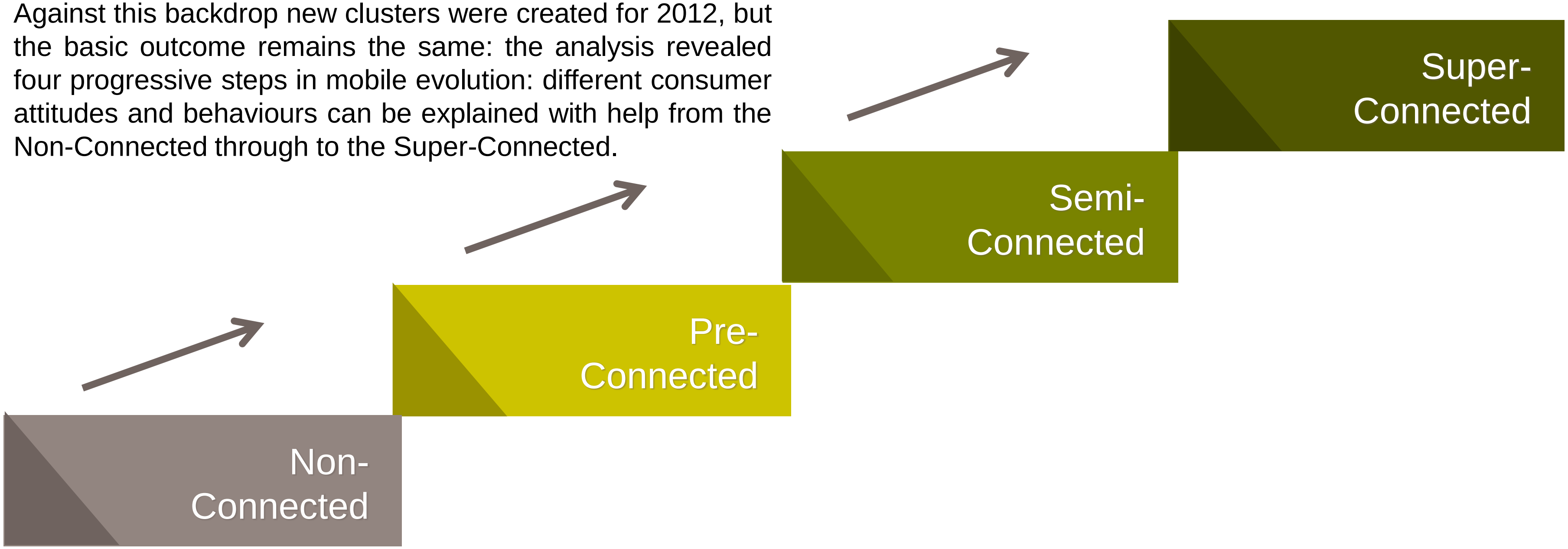
This report carefully examines the topic of internet, in particular mobile internet. The following topics were investigated: how mobile internet changes people's everyday lives – for example with new communication channels, the ability to maintain social contacts, self-organisation, but also basic consumer attitudes.

It is also examining Europeans' specific user behaviour concerning internet and mobile phones/smartphones, as well as making calls using either a landline or a mobile device.

Cluster analysis was used to determine user types based on attitudes and to update the results of the 2012 study. An optimised process was used to produce more stable results. Against this backdrop new clusters were created for 2012, but the basic outcome remains the same: the analysis revealed four progressive steps in mobile evolution: different consumer attitudes and behaviours can be explained with help from the Non-Connected through to the Super-Connected.

Because the steps of mobile evolution have already been identified for the second time in 2014, we can not only recognise the differences between the nine countries and the status quo of each population, but we can also measure developments that have taken place over the last two years.

It mainly concerns the differences that signify the evolutionary steps. There are also similarities and basic needs spanning all evolutionary steps; these will be described at the end of this report.



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2. Changes in everyday life

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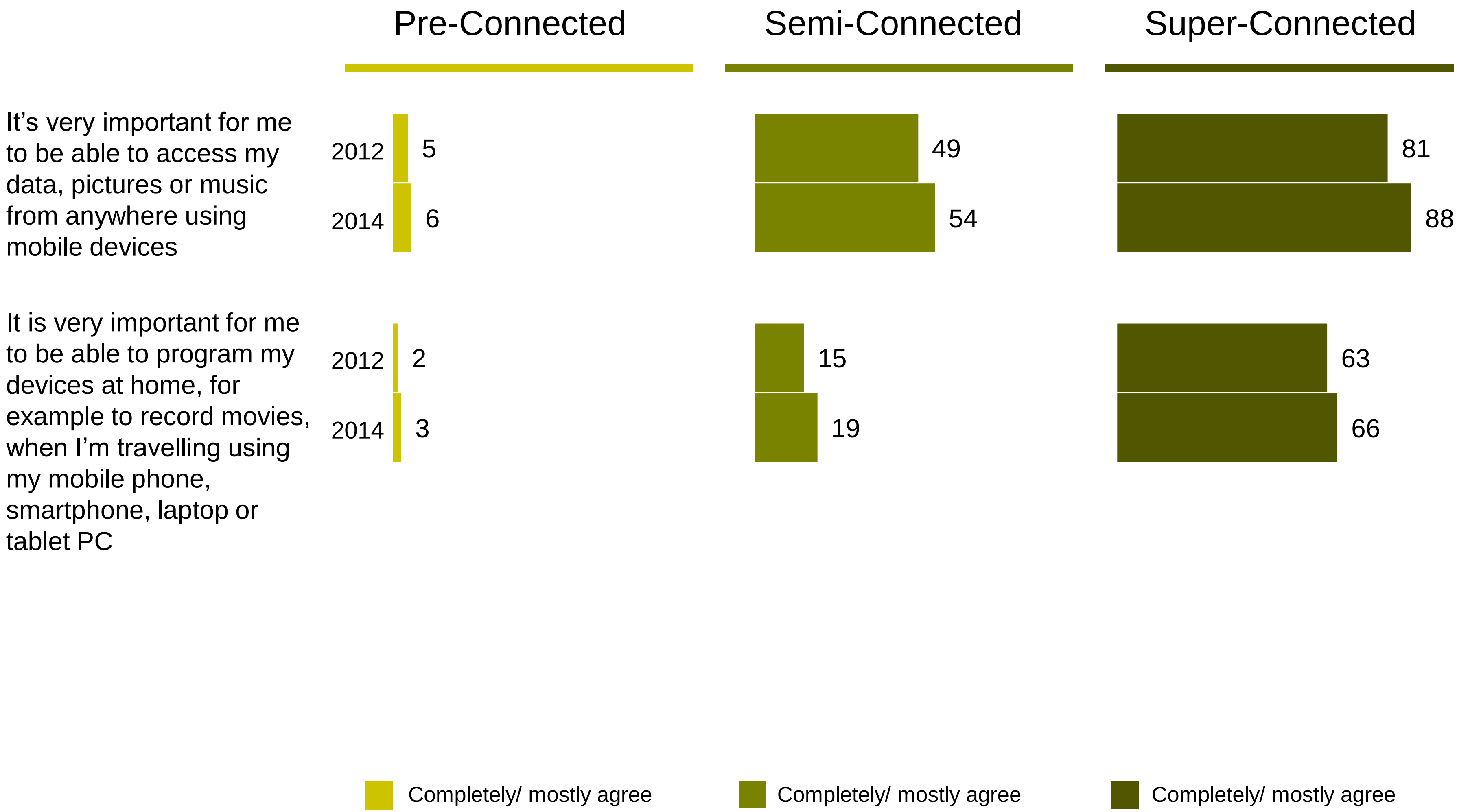
Cloud Computing



Answers in %, Top 2 on the following scale: 1=Completely agree, 2=Mostly agree, 3=Agree less, 4=Completely disagree
Base 2014: 93.4 m Pre-Connected (n=2,359), 122.1 m Semi-Connected (n=2,821) 94.3 m Super-Connected (n=2,122)

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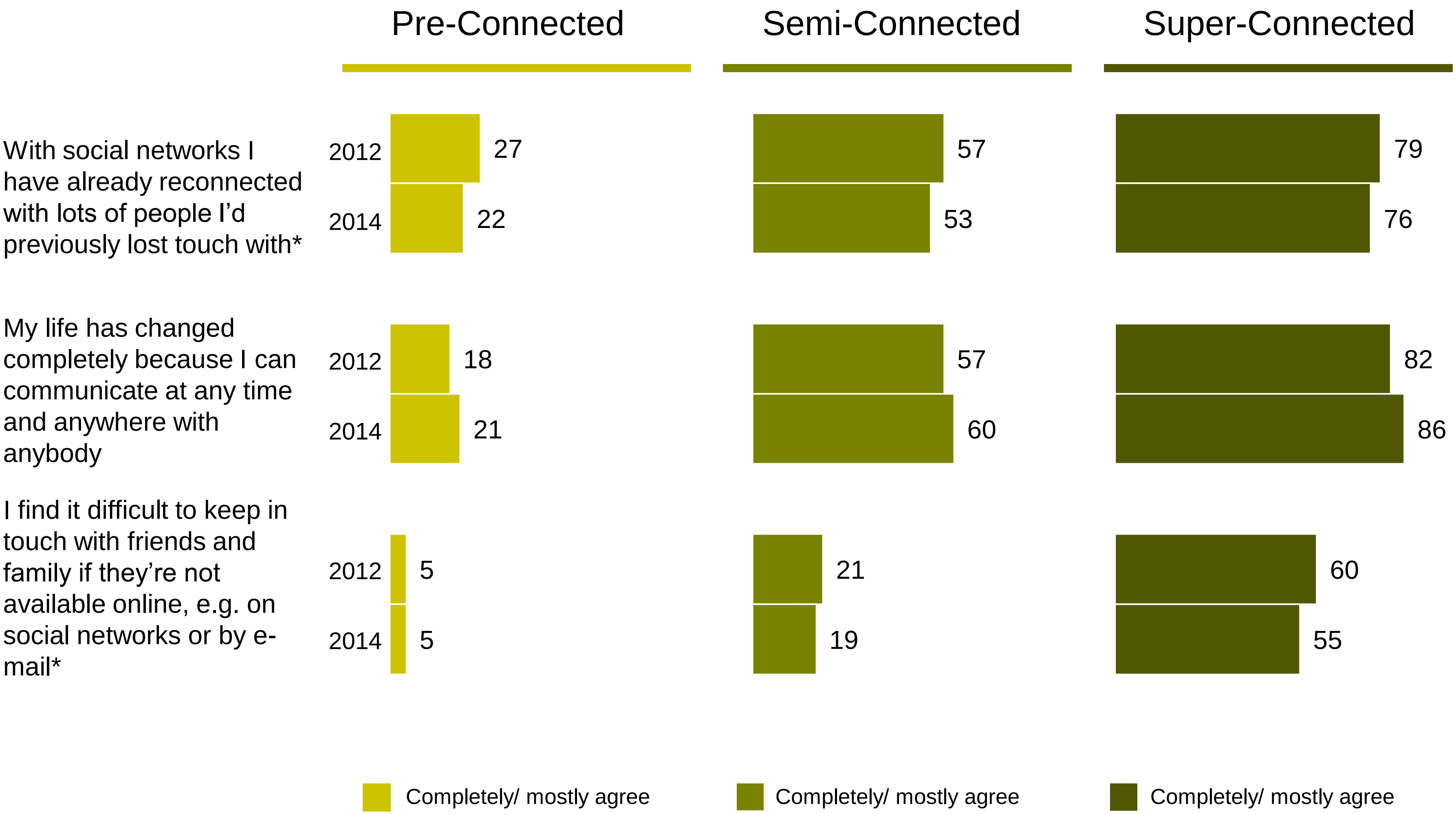
Changes in communication channels



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*Subgroup internet users
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Variety and choice of communication channels

	Pre-Connected	Semi-Connected	Super-Connected
I only give out my mobile phone number, not the landline number*	41	73	84
If I have the option to choose between landline number and mobile phone number, I always call the mobile phone number first	34	67	82
If I have the option, I always prefer to call online/use Voice over IP, e.g. via Skype, compared to calling via the landline or mobile phone*	9	24	50
It is a major plus for me that I can also see the other person when calling by videophone***	11	29	56

Completely/ mostly agree | Completely/ mostly agree | Completely/ mostly agree

Answers in %, Top 2 on the following scale: 1=Completely agree, 2=Mostly agree, 3=Agree less, 4=Completely disagree
*Subgroup mobile phone users; **Subgroup internet users; ***Subgroup mobile phone or internet users
Base 2014: 93.4 m Pre-Connected (n=2,359), 122.2 m Semi-Connected (n=2,826), 94.8 m Super-Connected (n=2,133)

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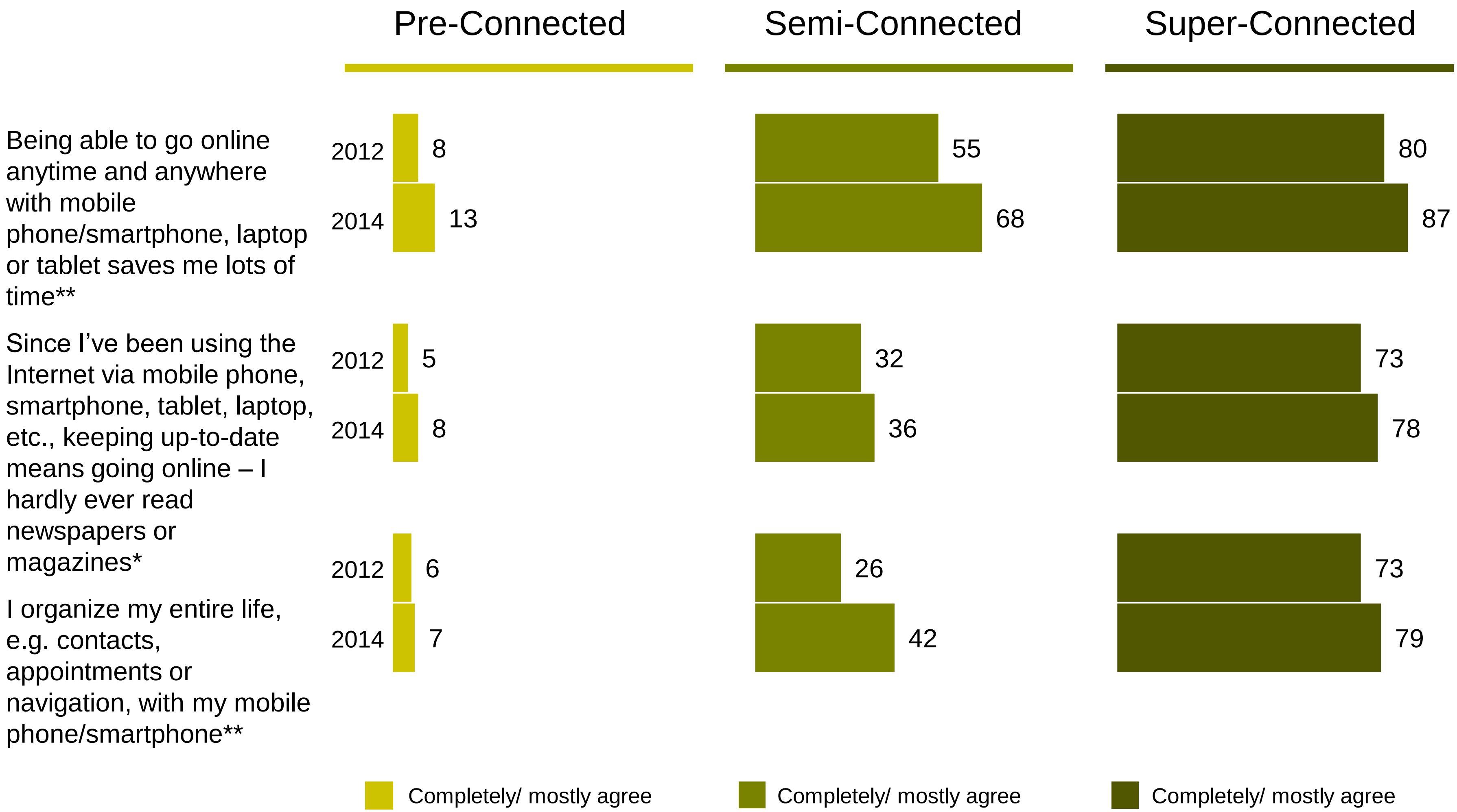
Mobile time management and organisation (1/2)



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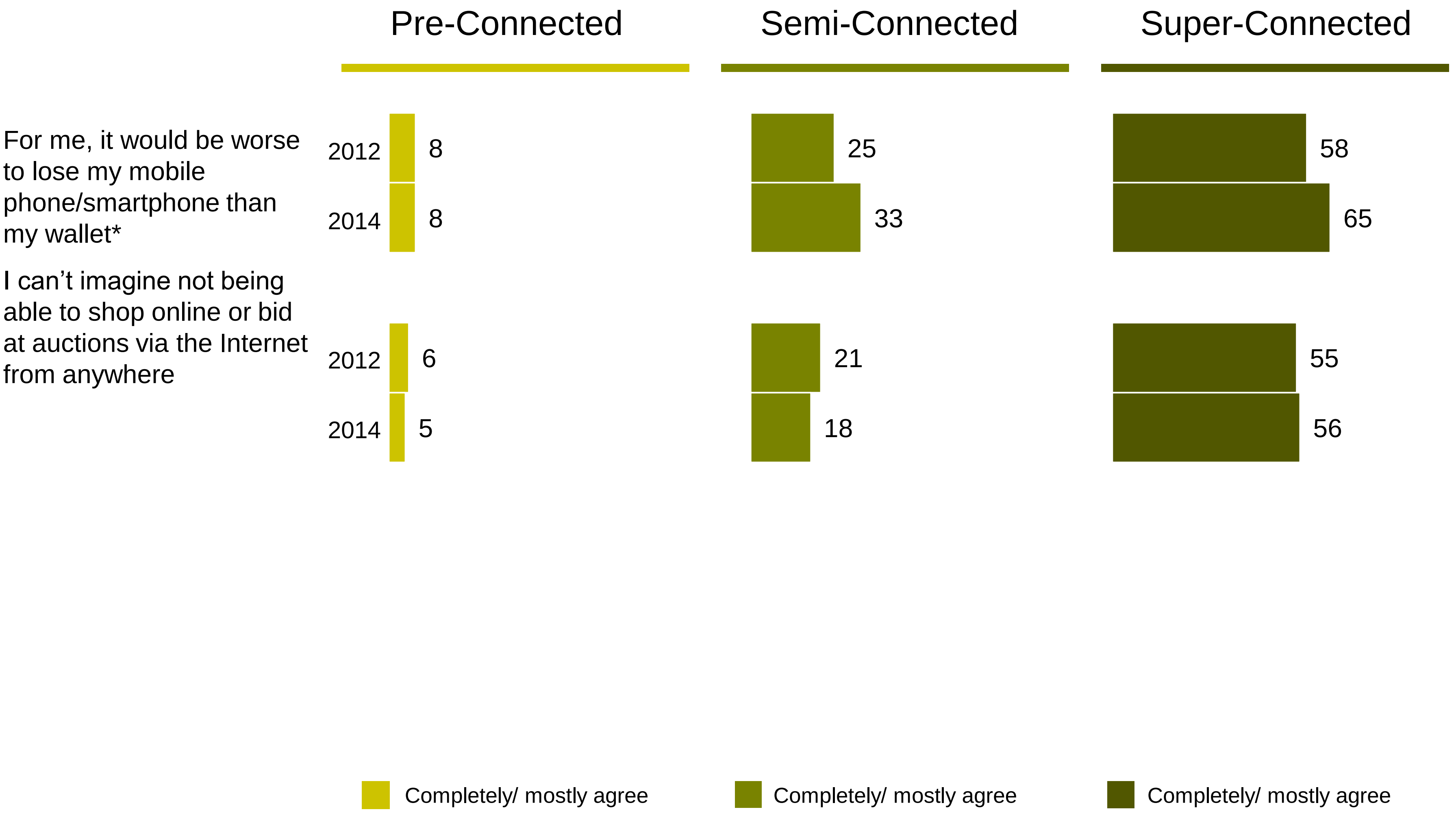
Mobile time management and organisation (2/2)



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Basis 2014: 93.4 m Pre-Connected (n=2,359), 122.1 m Semi-Connected (n=2,821) 94.3 m Super-Connected (n=2,122)

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Roper Consumer Styles: eight lifestyle groups with individual value preferences

Need: to have

Materialism, price orientation

Need: live a passionate life

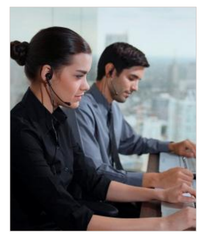
Hedonism, pleasure

Dreamers – dream of great fortune

Homebodies– yearning for material security and status

Settled – desire for peace and harmony

Adventurers – living passions



Rational-realists – hard work and respect for the nature

Demanding – sense of duty, discipline and enjoyment of life

Open-minded – between self-realization, social responsibility and enjoyment

Organics – search for sustainability and intellectual enrichment

Puritanism, security orientation

Need: peace and security

Need: to be

Postmaterialism, quality orientation

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Roper Consumer Styles: Most important lifestyles per evolutionary step

Non-Connected

36% Settled

17% Homebodies

15% Demanding

Pre-Connected

20% Homebodies

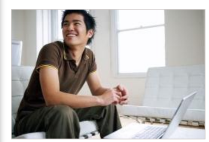
19% Open-minded

18% Demanding

Semi-Connected

24% Open-minded

21% Homebodies



18% Adventurers

Super-Connected

33% Adventurers

24% Open-minded

Base 2014: 131.7 m Non-Connected (n=2,966), 93.4 m Pre-Connected (n=2,359), 122.2 m Semi-Connected (n=2,826), 94.8 m Super-Connected (n=2.133)

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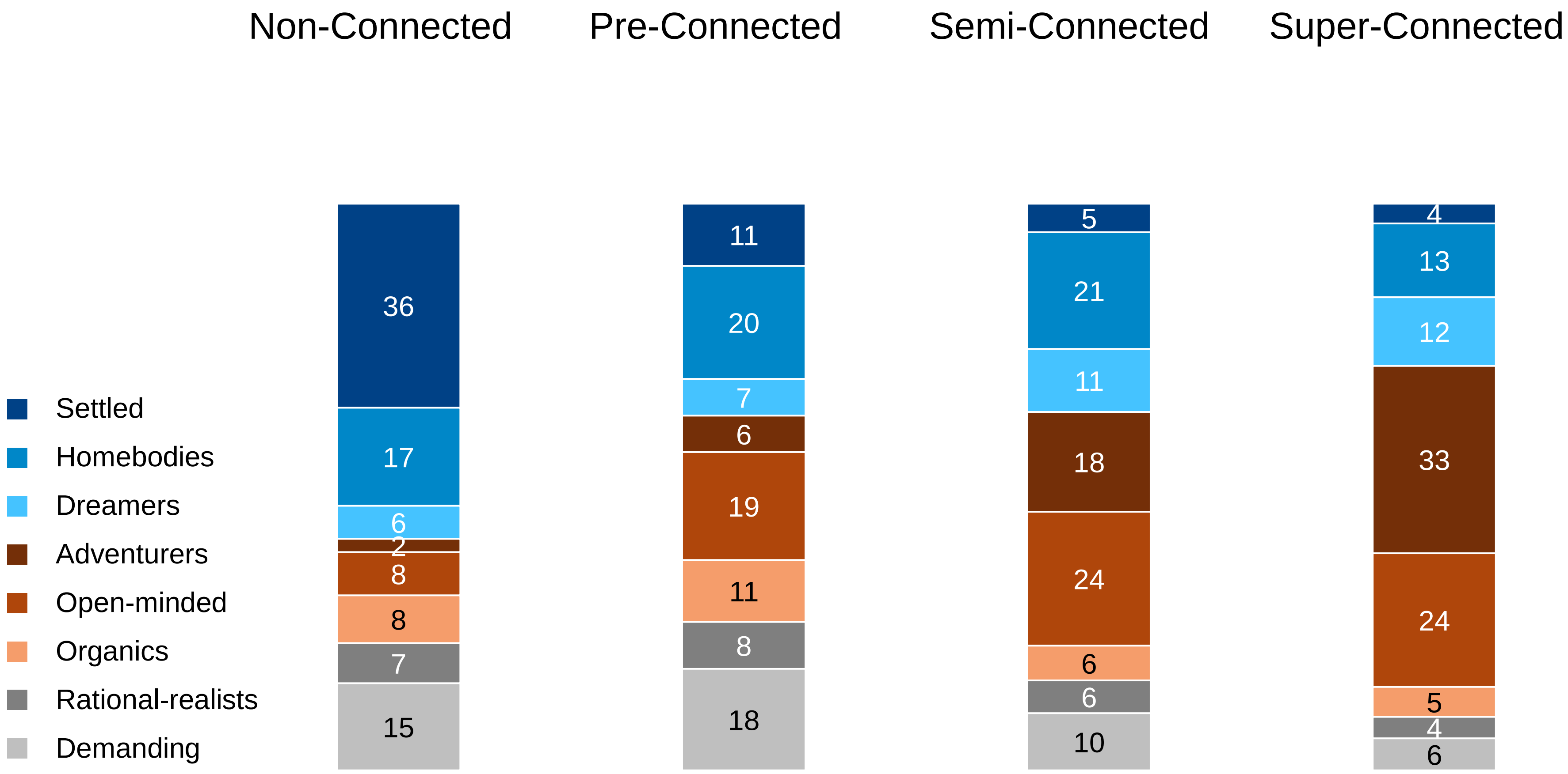
Roper Consumer Styles by evolutionary step: an overview



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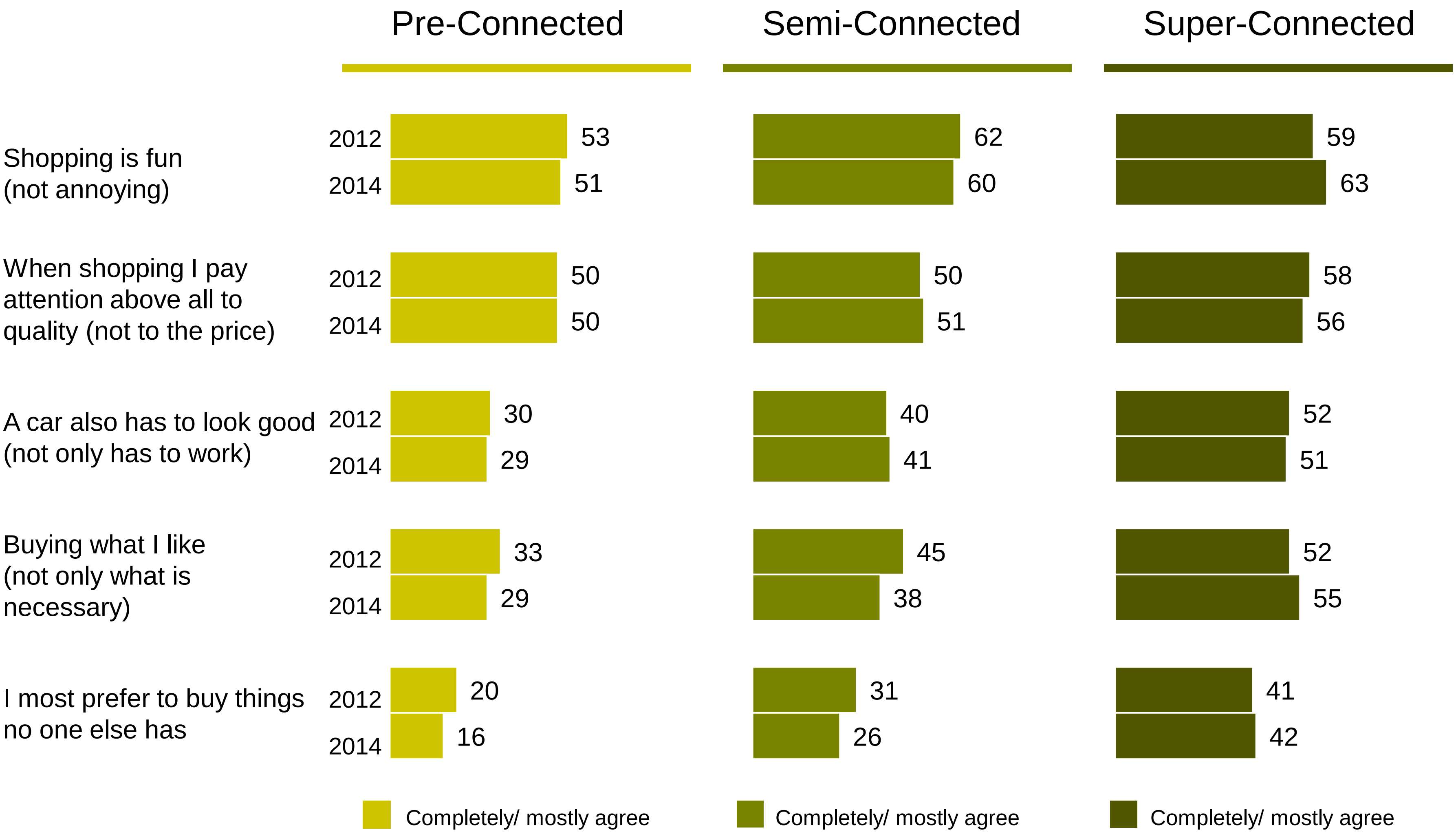
Consumer attitudes



Answers in %; *bipolar scale with four characteristics, opposite poles in brackets
Base 2014: 93.4 m Pre-Connected (n=2,359), 122.2 m Semi-Connected (n=2,826), 94.8 m Super-Connected (n=2,133)

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Mobile evolution: attitudes, values and consumption

Non-Connected

Use of a “normal” mobile

Nominal internet use

Values: “down-to-earth” or “domestic”

Consumption: buys what is needed; low consumption of “unique” products”

Pre-Connected

Generally little enthusiasm for mobile phones, internet and the opportunities they provide

But mobile communication is well received: 4 in 10 almost always give out only their mobile phone number and a third call the mobile number first.

Semi-Connected

Recognition of added value, practical and useful qualities have priority:

Increasing amounts of time saved thanks to mobile internet

Revival of contacts thanks to social networks

Access to pictures, music in the Cloud

Communication with everyone, everywhere

Super-Connected

Indispensability of mobile internet use in all areas of life:

Organising everything

Media use: from print to online

Social life: expanded online

Values: “adventurer” or “cosmopolitan”

Consumption: hedonism and aesthetics; defining oneself by the possession of certain things

3. User behaviour

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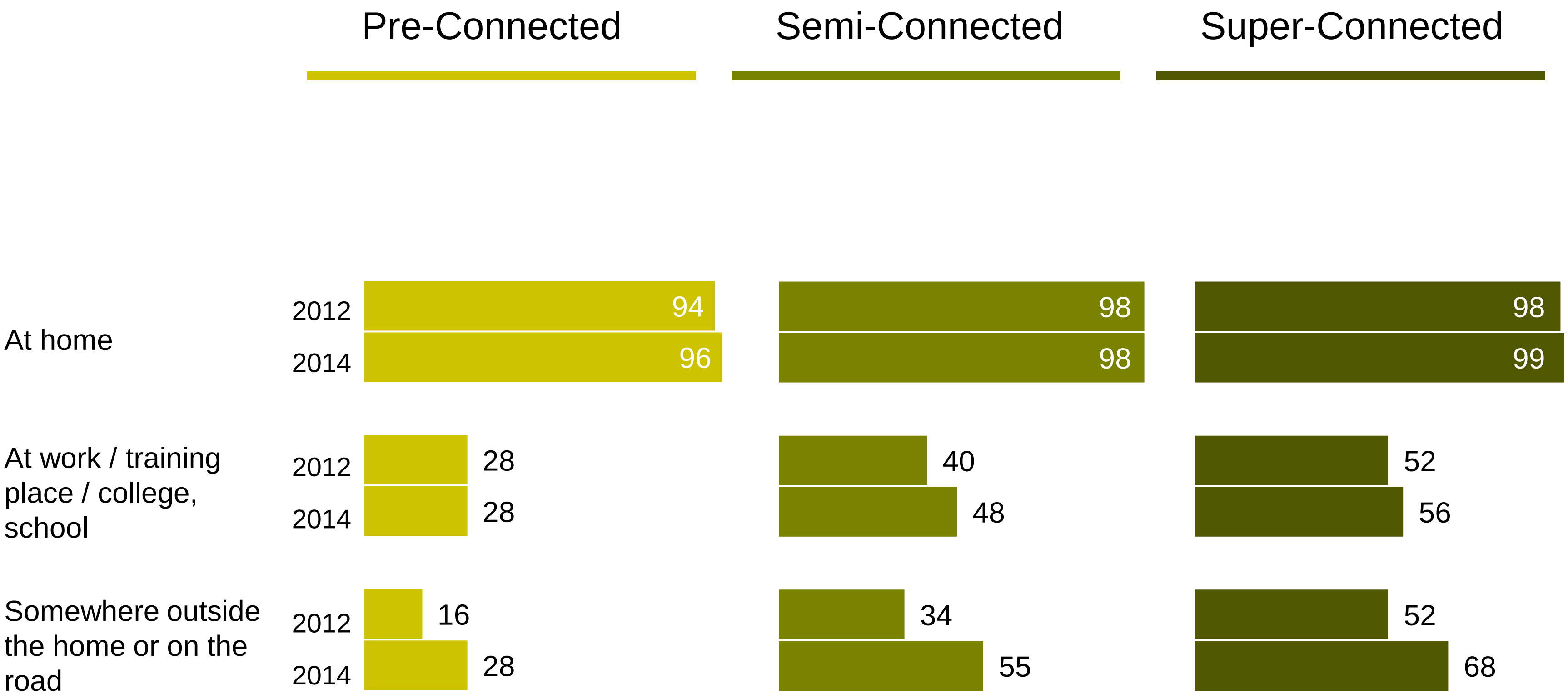
Internet use by location in Europe



Answers in %, multiple use possible
Base 2014, internet users: 93.2 m Pre-Connected (n=2,356), 114.1 m Semi-Connected (n=2,647), 84.3 m Super-Connected (n=1,928)

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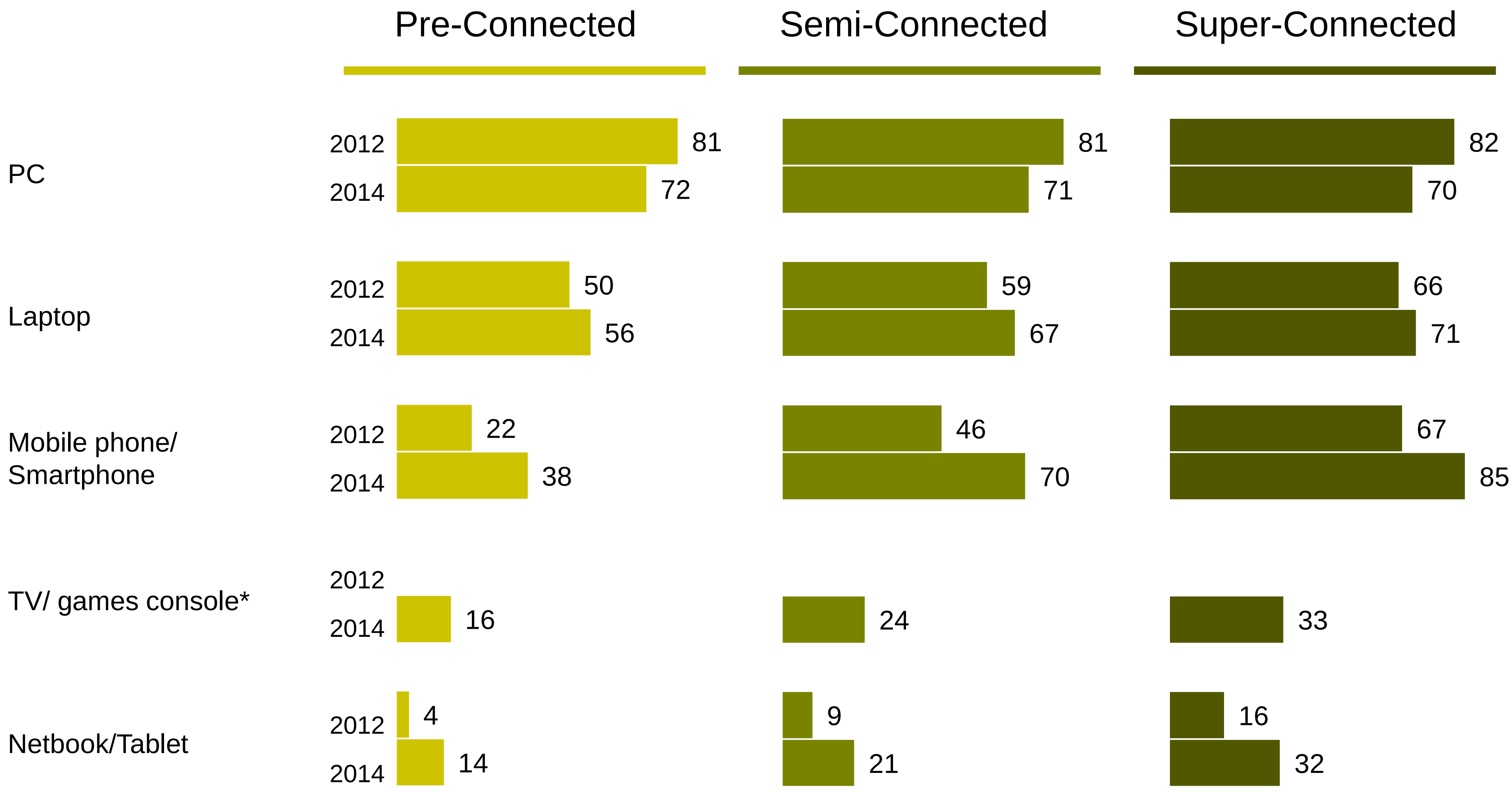
Internet use by device in Europe



Answers in %; *no time comparison possible as only included in 2014
Base 2014, internet users: 93.2 m Pre-Connected (n=2,356), 114.1 m Semi-Connected (n=2,647), 84.3 m Super-Connected (n=1,928)

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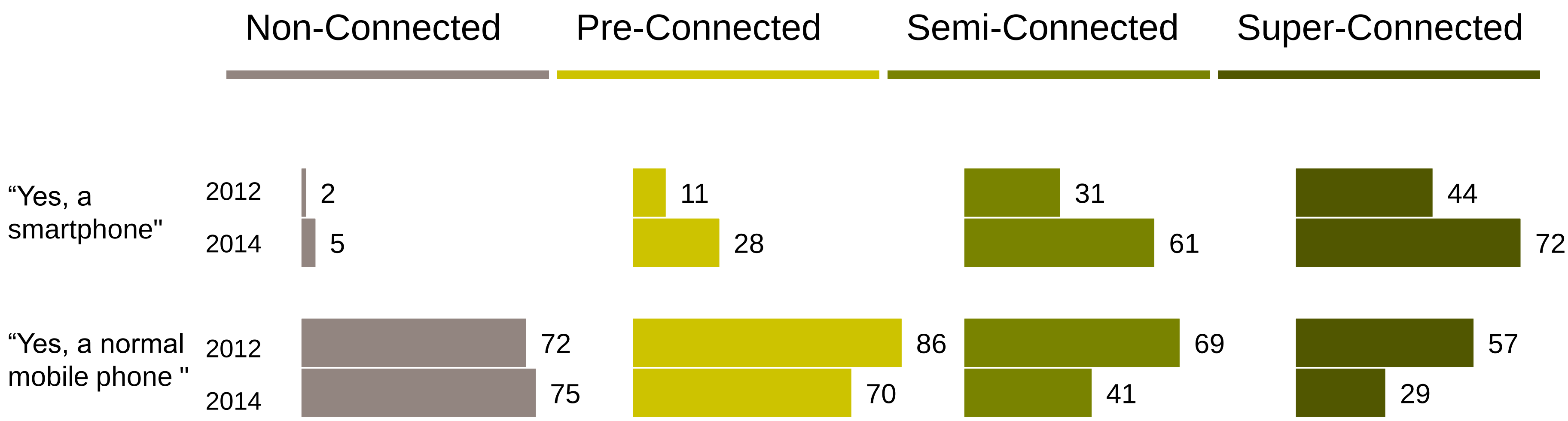
Ownership of mobiles and smartphones in Europe



Answers in %, multiple use possible
Base 2014: 131.7 m Non-Connected (n=2,966), 93.4 m Pre-Connected (n=2,359), 122.2 m Semi-Connected (n=2,826), 94.8 m Super-Connected (n=2,133)

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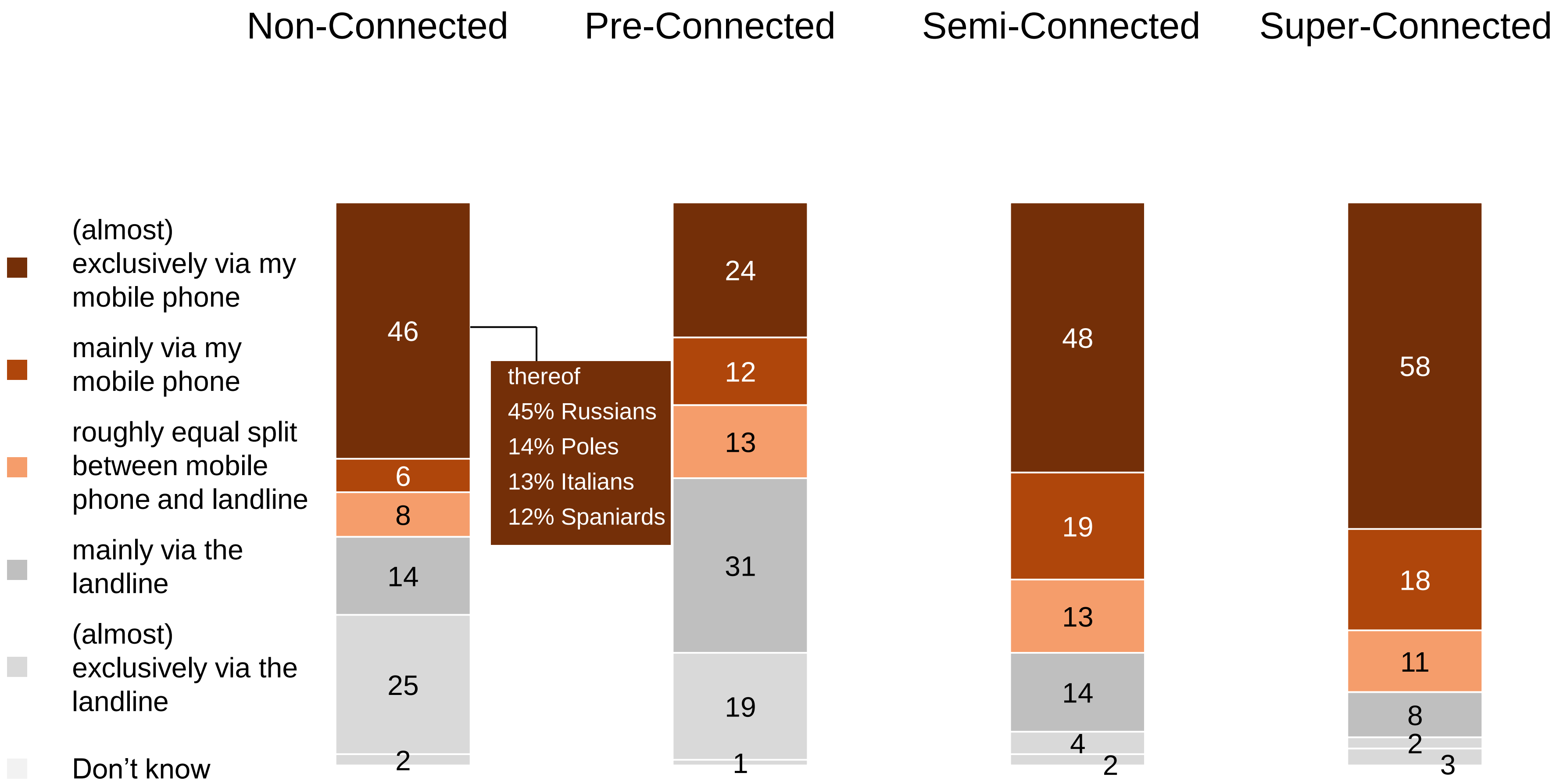
Call behaviour in Europe



Answers in %
Base 2014: 131.7 m Non-Connected (n=2,966), 93.4 m Pre-Connected (n=2,359), 122.2 m Semi-Connected (n=2,826), 94.8 m Super-Connected (n=2,133)

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Mobile evolution: devices, features and use

Non-Connected

- Use of a “normal” mobile
- Nominal internet use
- High percentage make calls almost exclusively using their mobile, primarily in Russia and Poland (reason: better mobile avai-lability/network)

Pre-Connected

- General: Use of mobile phone and internet
- Mobile phone: Mostly “normal” mobile phones, but smartphones are on the increase
- Internet is used mainly on stationary PCs and laptops, but also increasingly on mobile phones/smartphones
- Use mainly landlines for making calls

Semi-Connected

- Mobile phone: Now use mainly smartphones
- Internet still used mainly stationary on a laptop
- But: Internet now available on various devices; enormous increase in mobile phone/smartphone use and therefore internet on the go
- Use mainly mobile phones for making calls

Super-Connected

- Smartphone percentage clearly dominates
- Three-quarters make calls mainly using a mobile phone
- At least average internet use on all devices, including PC; internet use on mobile phone/smartphone has taken over use on all other devices.
- Highest percentage of internet users with tablet PC and television/games console (each a third)

4. Countries and target groups

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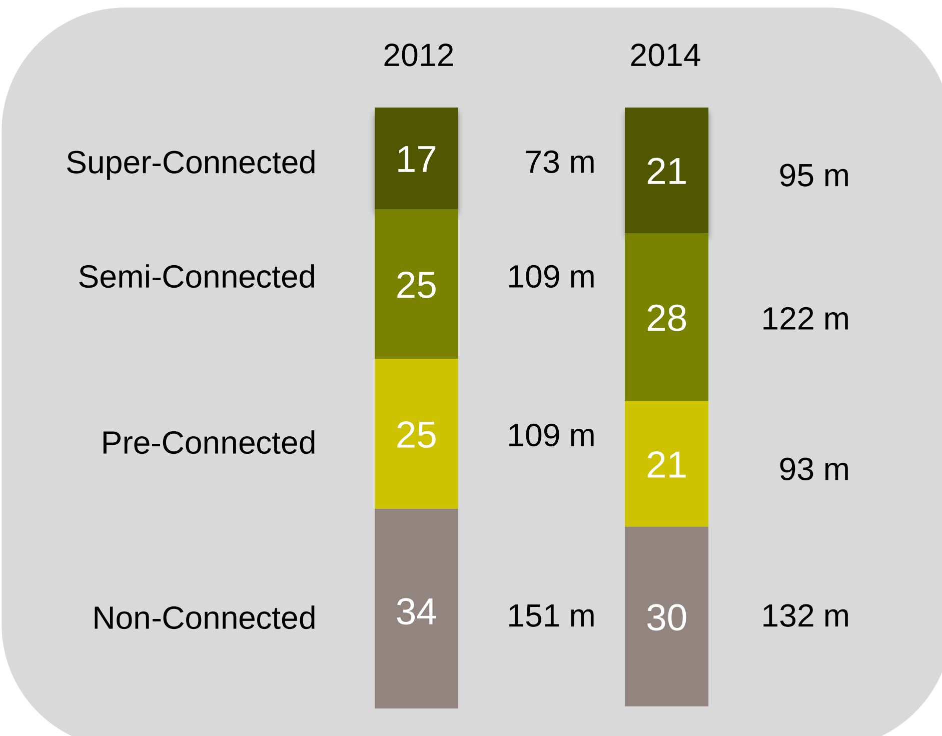
Steps in mobile evolution: Distribution in Europe

in %



Base 2014: 70.7 m Germans (n=2,076), 52.6 m French (n=1,007), 40.1 m Spaniards (n=1,034), 7.2 m Austrians (n=564), 32.7 m Poles (n=1,015), 51.9 m Italians (n=1,023), 13.9 m Nehterlands (n=501), 53.3 m Britons (n=1,041), 119.5 m Russians (n=2,023)

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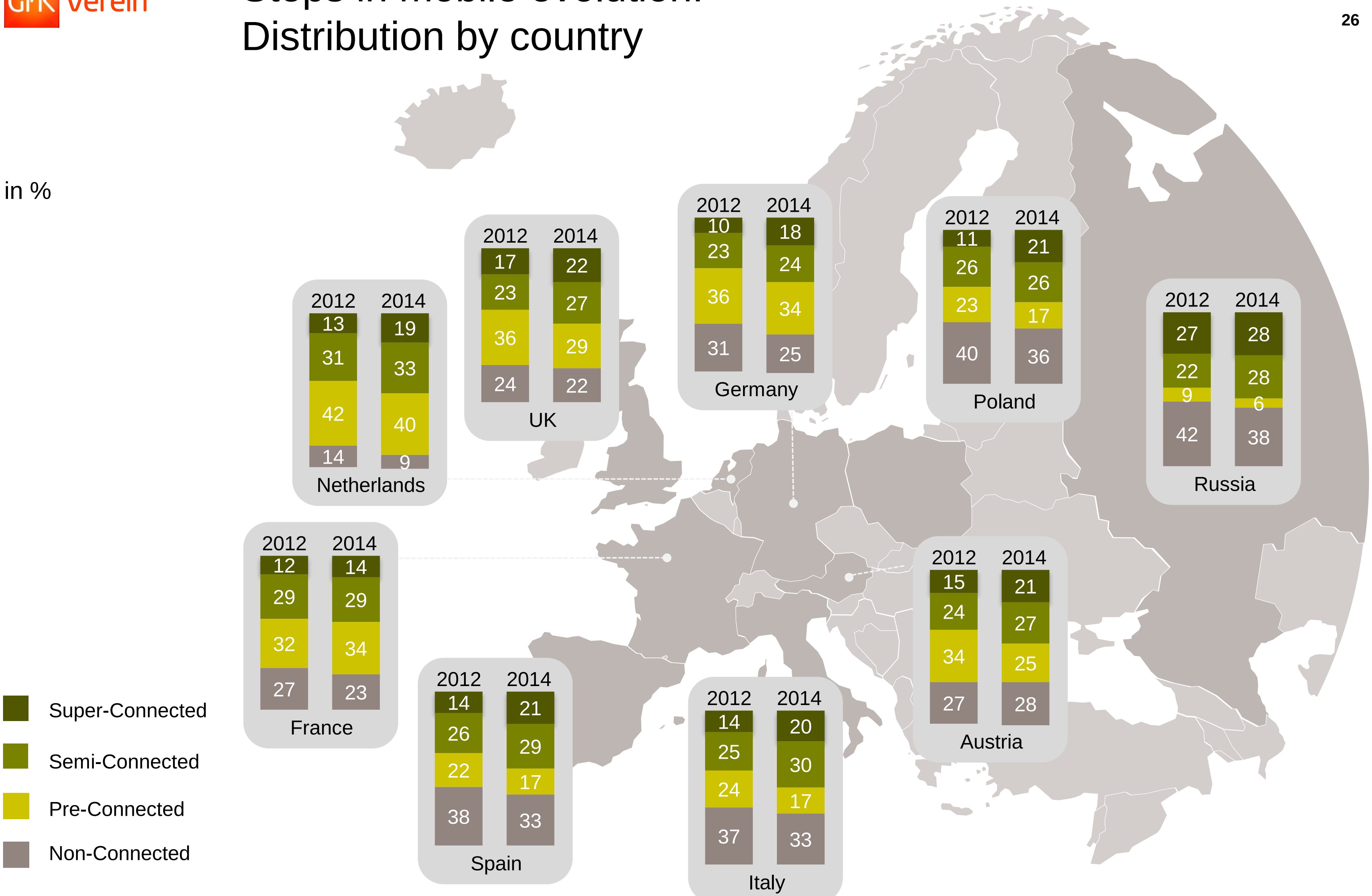
Steps in mobile evolution: Distribution by country

in %



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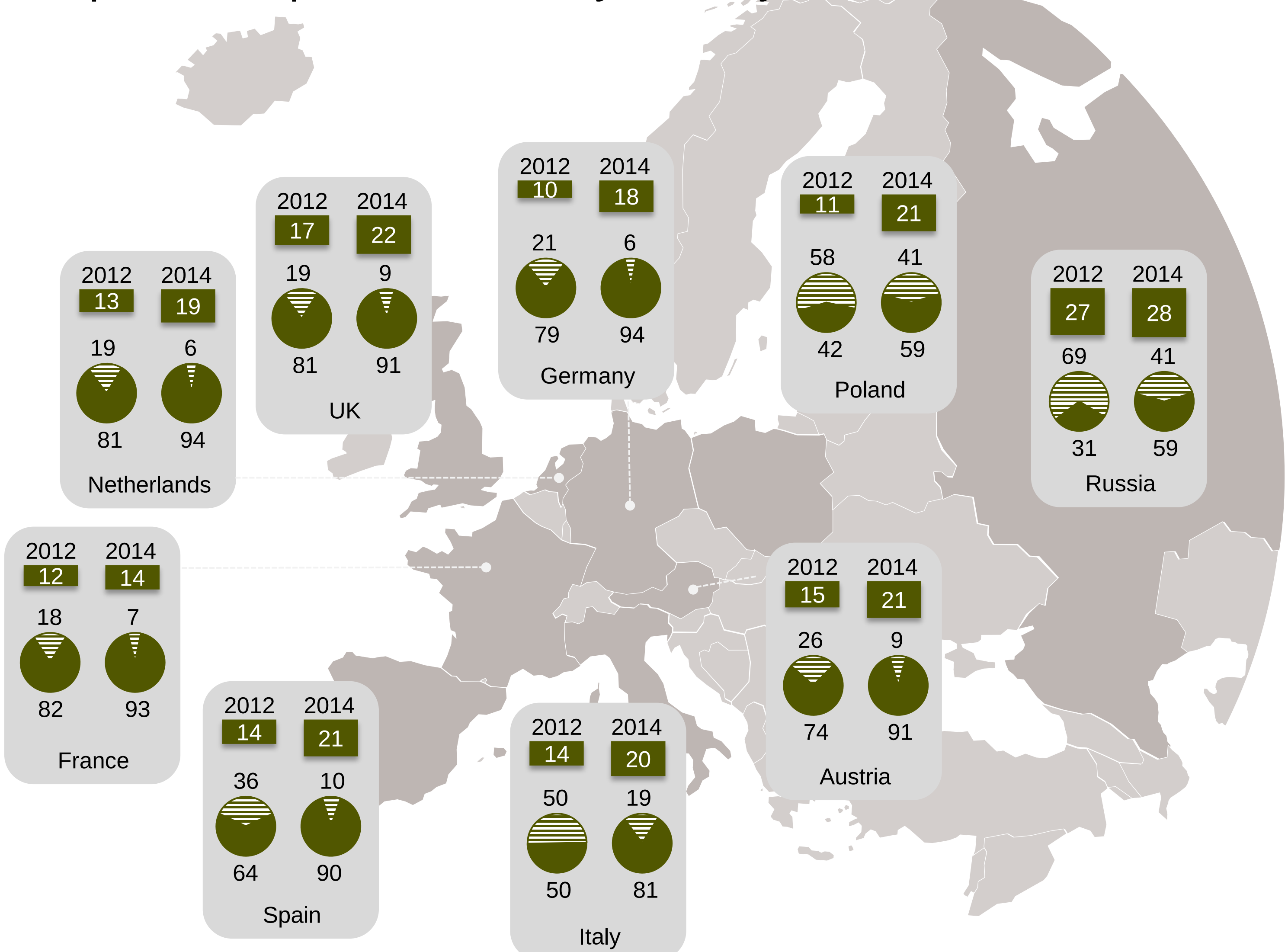
Steps in mobile evolution:
Deep Dive Super-Connectedy country

in %



Super-Connected incl. usage (= smartphone use or internet use with laptop, mobile phone or tablet/ netbook somewhere outside the home

Super-Connected excl. usage

Base 2014: 70.7 m Germans (n=2,076), 52.6 m French (n=1,007), 40.1 m Spaniards (n=1,034), 7.2 m Austrians (n=564), 32.7 m Poles (n=1,015), 51.9 m Italians (n=1,023), 13.9 m Nehterlands (n=501), 53.3 m Britons (n=1,041), 119.5 m Russians (n=2,023)

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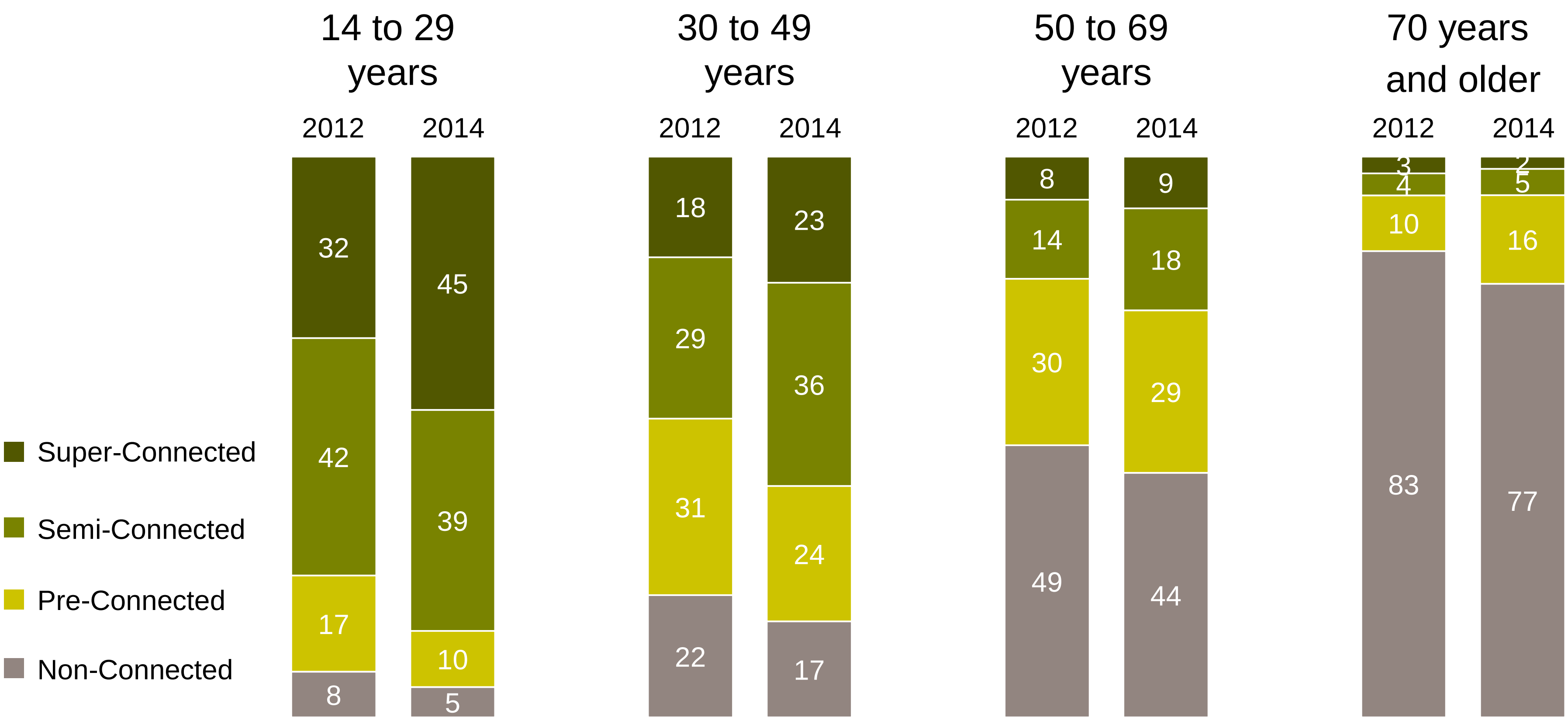
Steps in mobile evolution: Distribution by age group over time



Answers in %

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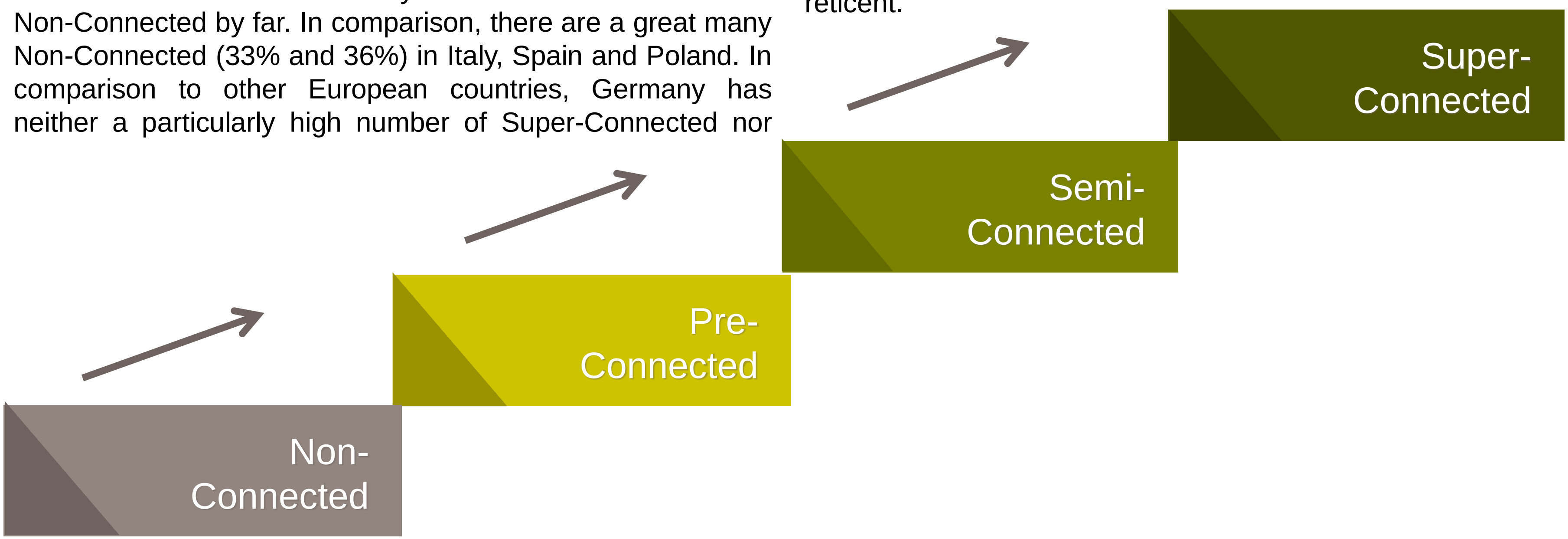
Mobile evolution: Countries and target groups

It comes as no surprise to discover that mobile evolution has advanced in all of the studied countries over the last two years. In total, the number of Pre-Connected and Non-Connected has decreased in favour of the Semi-connected and Super-Connected. The overview of individual countries will include both the highest and second highest evolutionary step.

At 20% and 21%, there is roughly the same percentage of Super–Connected in Austria, Spain, Poland and Italy. Great Britain lies just ahead with 22%, the Netherlands and Germany just behind with 19% and 18% respectively. At 33%, the Netherlands boast a very high number of Semi-Connected – and with 9% they have the lowest number of Non-Connected by far. In comparison, there are a great many Non-Connected (33% and 36%) in Italy, Spain and Poland. In comparison to other European countries, Germany has neither a particularly high number of Super-Connected nor Non-Connected.

Russia is a special case – and to a lesser a extent so is Poland: With 28%, Russia has the highest percentage of Super-Connected – and with 38% the most Non-Connected. But only around 60% of Super-Connected in Russia use a smartphone or use the internet on a mobile device away from home, the rest have been allocated to this group because of their attitudes – and would probably get started as soon as they had the technical possibilities.

Almost half of 14-29 year-olds are “super connected”. Although it has increased since 2012, the percentage is lower in higher age groups – only the over-70s continue to be very reticent.



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5. Shared basic needs

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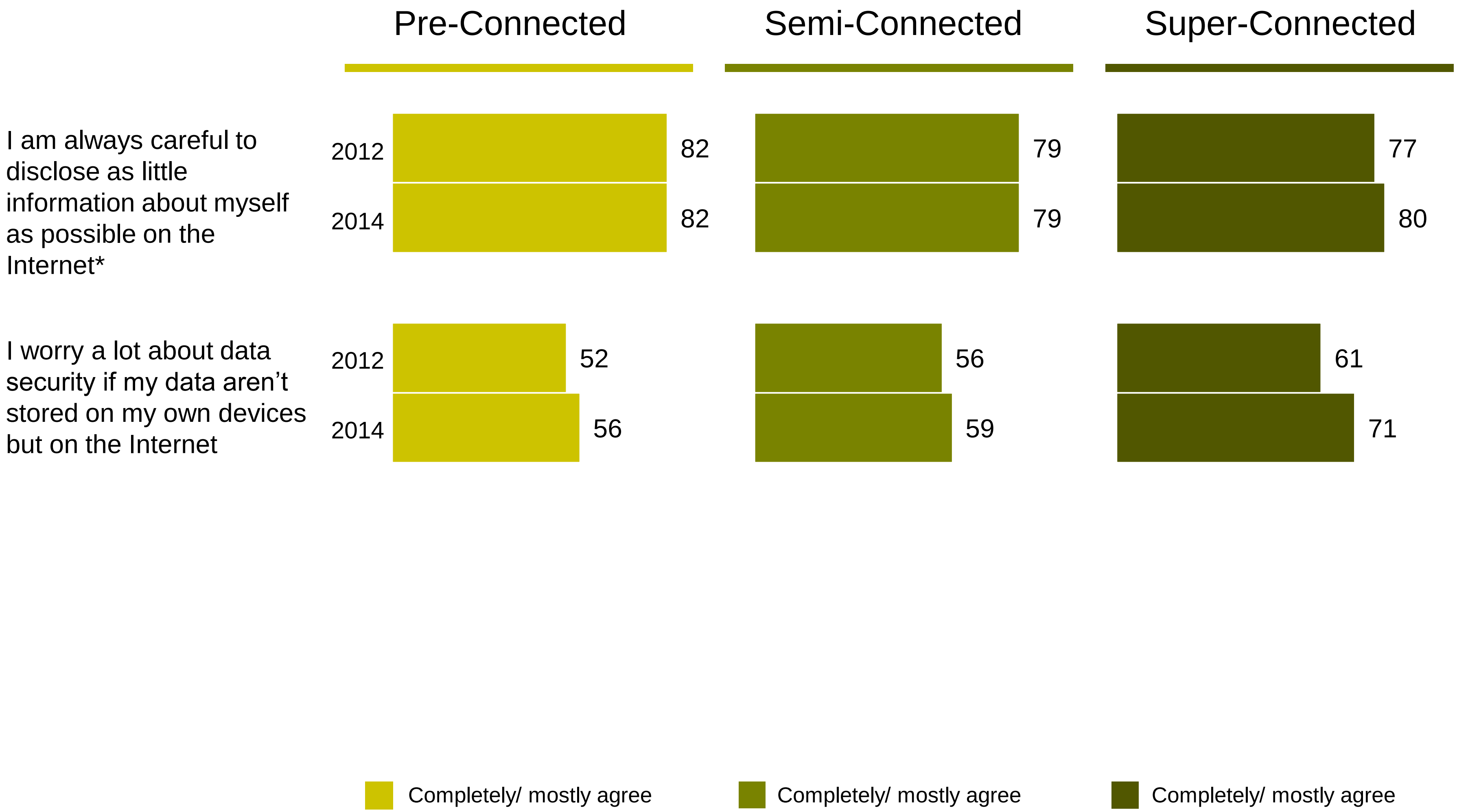
Similarities: Security



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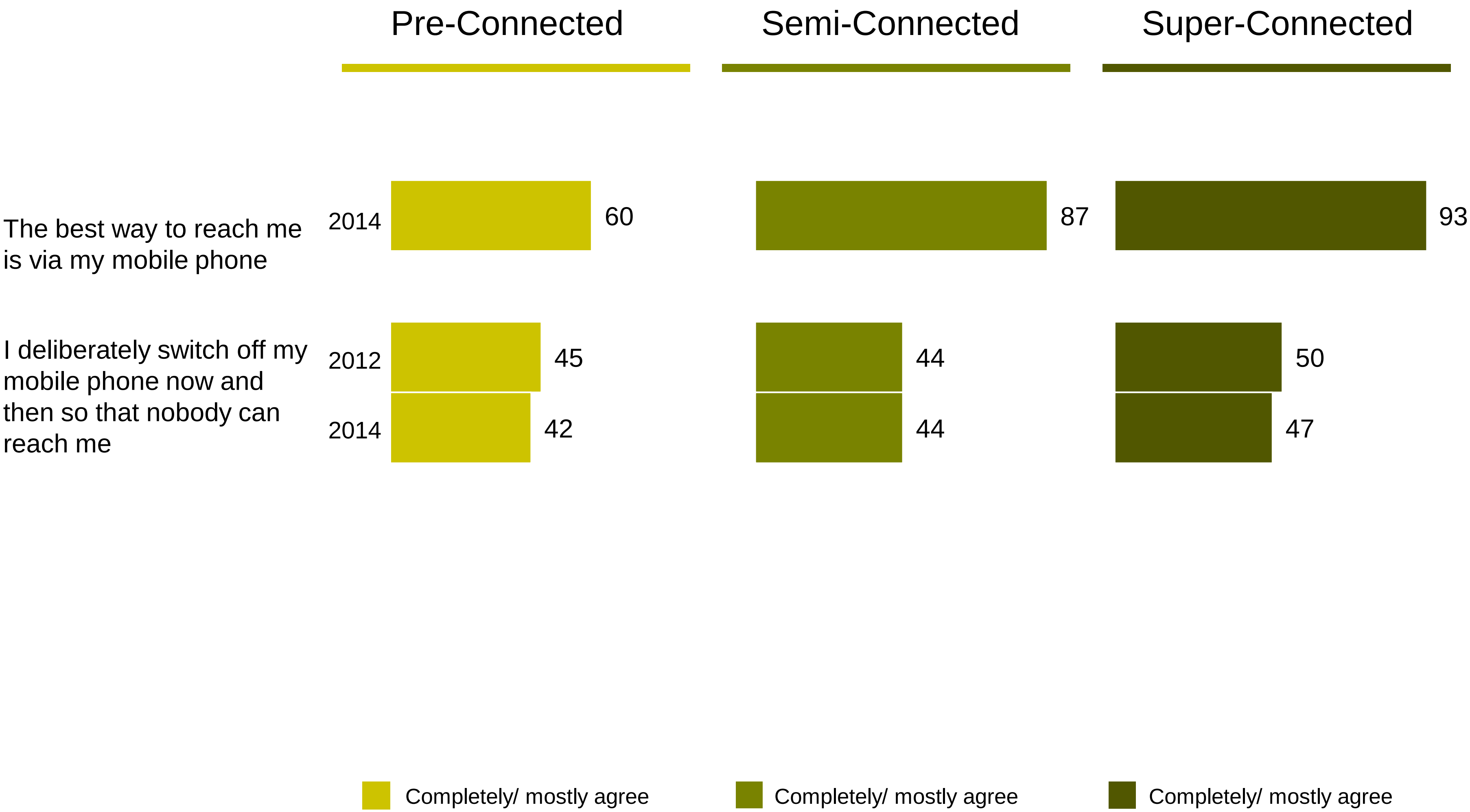
Similarities: Availability & time management



Answers in %, Top 2 on the following scale: 1=Completely agree, 2=Mostly agree, 3=Agree less, 4=Completely disagree
Base 2014 mobile phone users: 90.4 m Pre-Connected (n=2,282), 121.2 m Semi-Connected (n=2,799) 93.7 m Super-Connected (n=2,109)

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Mobile evolution: Shared basic needs

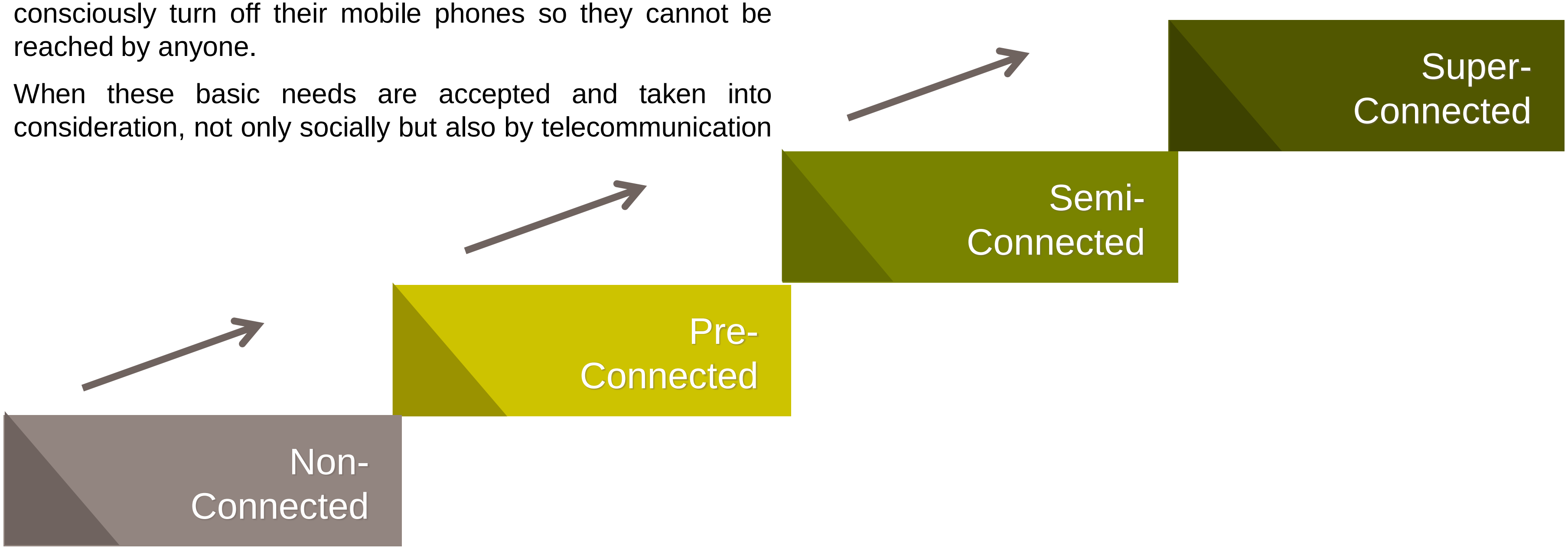
While the differences between the user types dominate, they also have similarities that are best regarded as shared basic needs.

This also includes the need for security: in each evolutionary step there is widespread awareness of giving out as little personal data as possible on the internet – even if it is surely understood differently by the different types. Accordingly, almost the same level of skepticism about data security prevails across the different user groups, especially if the data is saved online or in a Cloud, respectively.

The wish to manage one's own time represents another key need: for this reason roughly four in ten Europeans consciously turn off their mobile phones so they cannot be reached by anyone.

When these basic needs are accepted and taken into consideration, not only socially but also by telecommunication service providers and manufacturers, nothing will stand in the way of mobile availability.

It will come as no surprise that the Super-Connected can be reached far more easily on a mobile than on a landline. And this is true even for 60% of the Pre-Connected. The developments in this dynamic market continue to be exciting.



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6. Methodology

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Sample & Methodoloy

Country	2012		2014	
	Sample size	Population in million	Sample size	Population in million
Germany	2,099	71.7	2,076	70.7
France	1,005	52.5	1,007	52.6
Spain	1,011	40.5	1,034	40.1
Austria	525	7.2	564	7.2
Poland	1,016	32.4	1,015	32.7
Italy	1,029	52.7	1,023	51.9
Netherlands	514	13.8	501	13.9
Great Britain	1,056	52.2	1,041	53.3
Russia	2,017	119.6	2,023	119.5
Total	10,272	442.6	10,284	442.0

Fieldwork: Winter 2011/2012 and Winter 2013/2014

Methodology: Face-to-Face-Interviews via CAPI and PAPI (Russia)

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