Adobe Mobile Experience Survey: What Users Want from Media, Finance, Travel & Shopping

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Executive Summary

Advances in wireless devices, coupled with the relatively cheap and easy access to mobile broadband, portend major changes in how consumers interact with content. As cell phones get smarter, people are using them less to make calls and more to text, shop, read news, play games, engage with social networks and perform routine tasks.

Our first-ever mobile consumer survey, *Adobe Mobile Experience Survey: What Users Want from Media, Finance, Travel and Shopping*, is designed to help businesses gain actionable insights on how to improve the mobile user experience. This first-of-its-kind, quantitative study measures mobile user characteristics, behavior, preferences, satisfaction levels and other experiential factors across four key consumer categories: 1) Media & Entertainment; 2) Financial Services; 3) Travel; 4) Consumer Products/Shopping.

The study was conducted by Keynote Services, which surveyed 1,200 U.S. consumers across a wide range of age groups and mobile device ownership. The survey responses were analyzed for gender, device and age differences.

Key Findings

- ***Media & Entertainment is the most penetrated category, both by number of users and time spent; Consumer Products/Shopping is the least penetrated by number of users.*** Whereas only 3% of those surveyed say they have not interacted with media content in the last six months, 38% say they have not purchased from their devices during the same period[1]. Media & Entertainment and Consumer Products/ Shopping also drew the most satisfied users.
- ***Respondents generally favor the browser experience over downloadable mobile apps, except when it comes to games, social media, maps and music.*** Two-thirds say they prefer the mobile web over downloadable mobile apps for accessing Consumer Products/Shopping and Media & Entertainment content.
- ***Overall, respondents report equal satisfaction levels with their browser and app experiences, and spend nearly equal amounts of time interacting with each.*** While downloadable mobile apps have drawn considerable buzz, they do not appear to surpass the mobile web in user satisfaction and engagement. Overall, respondents report equal satisfaction levels with their browser and app experiences, and spend nearly equal amounts of time interacting with each.
- ***Mobile's most active content consumers tend to be male, 30-49 years old and own iPhones; they also purchase more frequently and spend the most.*** Specifically, men spend more time than women on Financial and Travel content. However, women lead men in social networking (80% vs. 70%).
- ***Accessing maps and directions is the no. 1 mobile activity (81%), followed by three media-related activities: social networking (76%) accessing local information (73%) and reading news (68%).*** The top mobile Finance activity is reviewing bank account information (67%).
- ***The most popular consumer goods category is shrink-wrapped entertainment including movies, music and games, purchased by 43% of the respondents,*** followed by clothing, shoes and jewelry purchased by 30% of the respondents.

Conclusions and Recommendations

Though mobile is still in its nascent days, our study suggests that early adopters, as represented by our smartphone-dominated panel, are paving the way for greater adoption of services and behavior that, until recently, have been the purview of desktops. As the pace of smartphone adoption quickens globally, businesses have to be invested in the channel and move beyond the planning stages to start executing and gain some learnings on how users are interacting with the mobile channel.

1 The mobile commerce adoption rate by the survey participants is significantly higher compared to current estimates for the general U.S. population. This is due to their high adoption rate of browser-enabled smartphones compared to the broader population. Likewise, their adoption rates of other activities like travel booking and securities trading appear higher than current estimates for the general population.

Some considerations and recommendations for planning and executing a mobile strategy:

Where possible, businesses should utilize existing investments, tools, technologies and applicable know-how from their desktop-delivery approaches to develop mobile-optimized experiences. As devices get smarter, consumers are using them as mini-computers to do everything from reading news to personal banking to shopping. In turn, marketers need to deliver rich experiences to engage these users, applying best practices from their desktop delivery arsenal where it makes sense. Some of the desktop practices that translate well to mobile include full-screen viewing for images and video and larger text and buttons. No matter the industry, a richer experience will lead to greater interaction and engagement. Clean graphical interfaces with minimal clutter optimized for touchscreen interactions are a must. Above all, make it easy for consumers to interact with your brand; when they're on the go, users want information quickly with minimal fuss.

To maximize reach, invest in a mobile-optimized web experience and look beyond a single device. There is no one-size-fits-all approach in mobile, especially given the industry's proliferation of devices and operating systems.

For mobile strategies that call for reaching the broadest user base, a browser approach is the baseline threshold; a hybrid approach that delivers both web and app experiences is ideal.

We believe consumers do not prefer apps over browsers to access content partly because they like the convenience of simply typing their queries and destinations right into the browser, compared to frequently searching for applications, then downloading them from an app store. Users are also transferring their desktop behavior to the mobile browsing and search environment, which for many devices, mirror the familiar desktop experience. Moreover, most consumers have a limited appetite for the number of applications they are willing to download and maintain on their devices.

If the objective, however, is to offer a new utility or service for a loyal base, an app may be adequate. Ultimately, the choice will depend on the experience being delivered: the browser is more suited for researching, for instance, while apps are better for utilities and contained experiences like games.

With regards to device, the iPhone currently has a lot of buzz among marketers. But other operating systems, most notably Android, are gaining ground. Beyond that, a mobile strategy should be executed in a phased approach, with the understanding that mobile covers not only cell phones but all wirelessly connected devices. Today, e-readers, tablets, netbooks, portable gaming handhelds are all fair game, each requiring a nuanced, fine-tuned approach.

Mobile is a channel in flux, so monitor consumer mobile behavior, satisfaction levels and expectations continuously. Businesses that invest early in mobile will benefit, as current consumer expectations lag the technology, as corroborated by our survey. For instance, most respondents are not differentiating between mobile- and PC-optimized websites and they appear largely satisfied with the small-screen experience. With consumers not yet driving expectations for mobile, it's a great opportunity for businesses to get ahead of the curve, staying tuned to changing behavior and user demands.

For instance, mobile shopping is far from maturity, but the study suggests that consumers are moving beyond buying digital goods like music and ringtones and becoming comfortable buying physical goods through their mobile devices—even in high-touch categories like clothing, shoes, electronics and toys.

This suggests that mobile is and will be a real purchase channel even for businesses selling high-ticket, discretionary goods. These vendors will want to consider integrating commerce and other shopping features into their mobility roadmap.

Finally, keep in mind that our survey results were compiled based on responses from U.S. consumers and expectations and user preferences will vary by region or country. They will also vary by industry, influenced by age, gender and device differences.

Don't be myopic and focus on narrow user segments. Mobile is engaging users across the board, though some segments appear more tuned into their devices than others. However, as smartphone adoption gains wider momentum, differences in user engagement should narrow.

Today, iPhone users, compared to their peers, appear more engaged with their devices as more of them consume content across all categories. This may be partly due to Apple's loyal following and iPhone's dominance in the apps space. We expect other device user groups, most notably Android, to register greater engagement and popularity, as heated competition among smartphone makers and the vast potential of mobility continue to spur innovation and better user experiences.

Likewise, men also appear to be more active on their devices, shopping and spending more than women—likely because they tend to be early adopters and over index on smartphone adoption, corroborated by our survey participants, of which 78% of males own touchscreen devices versus 72% of females. The browser-enabled smartphones providing a PC-like experience make it easy and convenient to research and comparison-shop across different storefronts. We expect this gap to narrow as smartphone adoption becomes more pervasive.

While delivering a positive user experience is paramount to growing the mobile channel, the industry continues to be challenged by rapid changes and complexities such as device fragmentation, short battery life, processing power, and bandwidth usage demands. Although today's innovative mobile devices are capable of delivering PC-like experiences, providing the optimal experience for small form factors will require continuous monitoring of consumer mobile behavior, satisfaction levels and expectations. Businesses should continue to apply their know-how in desktop delivery to smaller touchscreens and stay ahead of consumers' ever increasing demands and expectations.

Methodology and Participants

Survey results are based on online responses from 1,200 U.S. participants surveyed by Keynote Services between August 25 and 30, 2010.

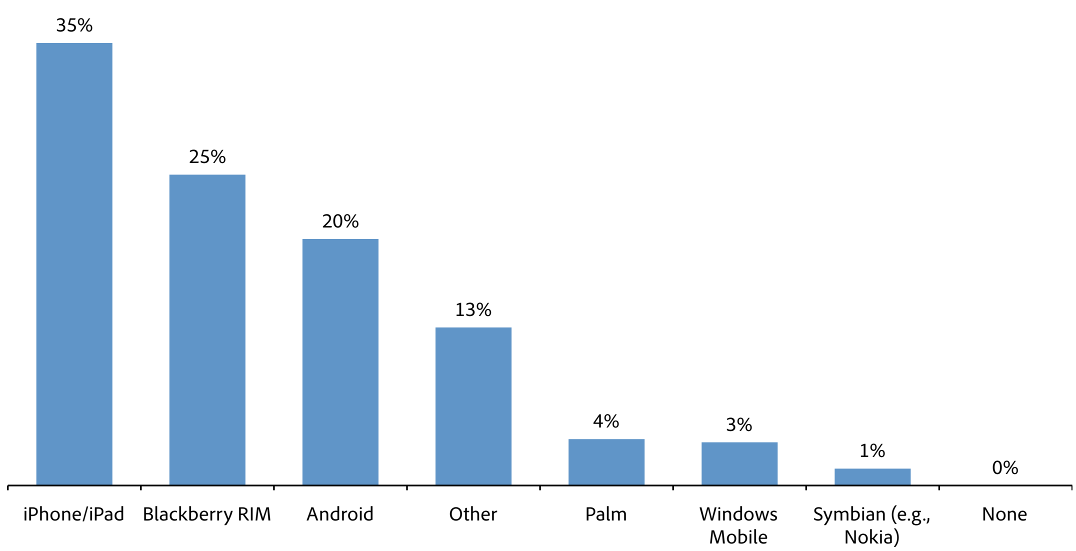
Participants skew female and young and over-index on browser-enabled smartphone adoption:

- The ratio of females to males is three to two, with more women in the 18-29 age group than the overall participant pool. Close to half of the participants (47%) are between ages 18-29; 42% are between ages 30-49.
- Just over a third of the participants use iPhones or iPads; a quarter of them use Research In Motion's Blackberry devices and a fifth use Android devices. Interestingly, iPhones/iPads appear to be the device of choice among men, while women have no clear favorite.

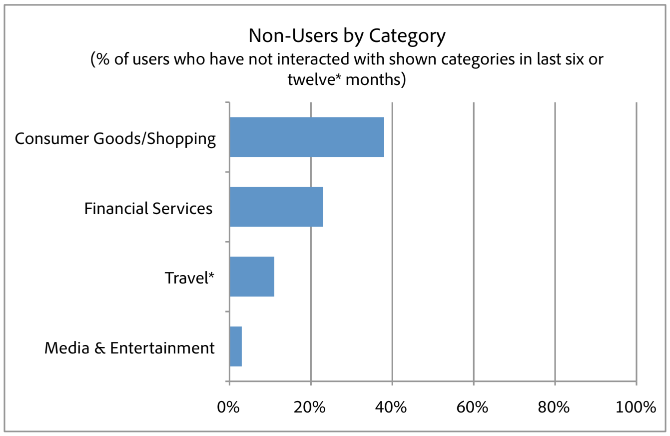
Respondents who have never used their device to interact with content in a specific category were not asked to respond to questions related that category.

For survey participant details, please see Appendix 1.

Survey Participants Mobile Device Ownership



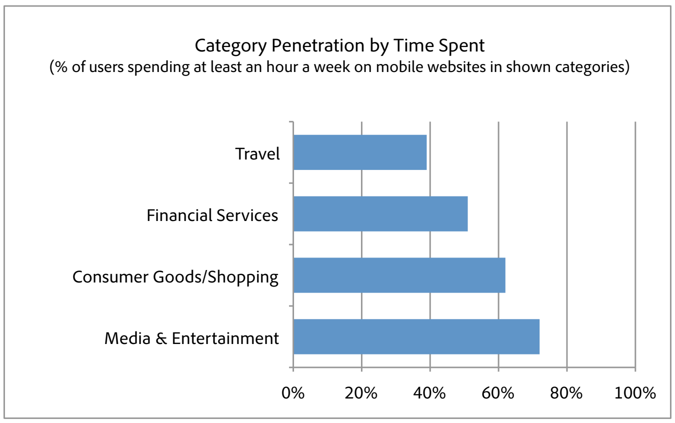
Users migrate to mobile. Who are they? Where do they spend their time?



Media & Entertainment is most popular category by number of users and time spent.

Drawing the most users, Media & Entertainment is the top penetrated category, followed by Travel, Finance, and Consumer Products/Shopping.

Travel is the second-most penetrated category due to the usage of maps by 81% of the respondents.

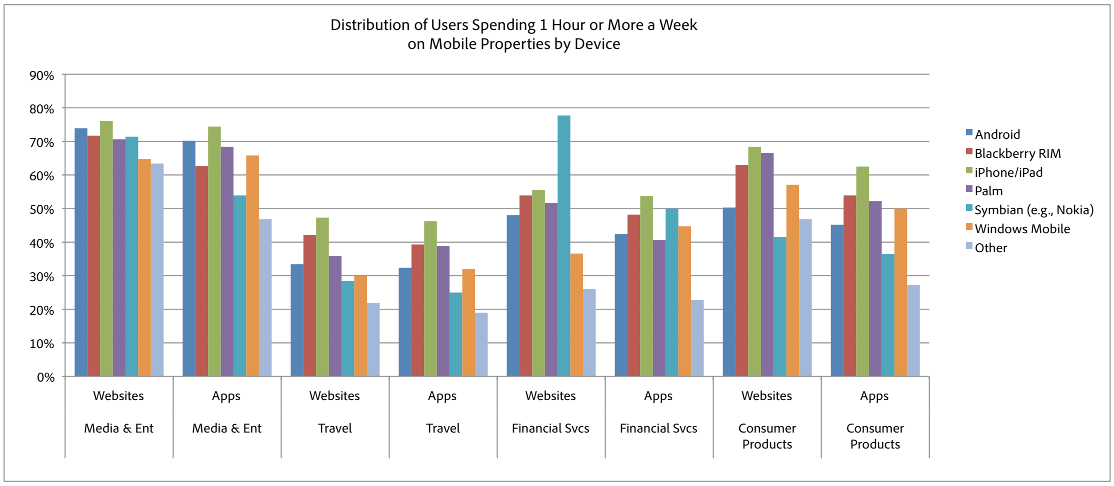


But measured by time spent, Travel is the least popular category.

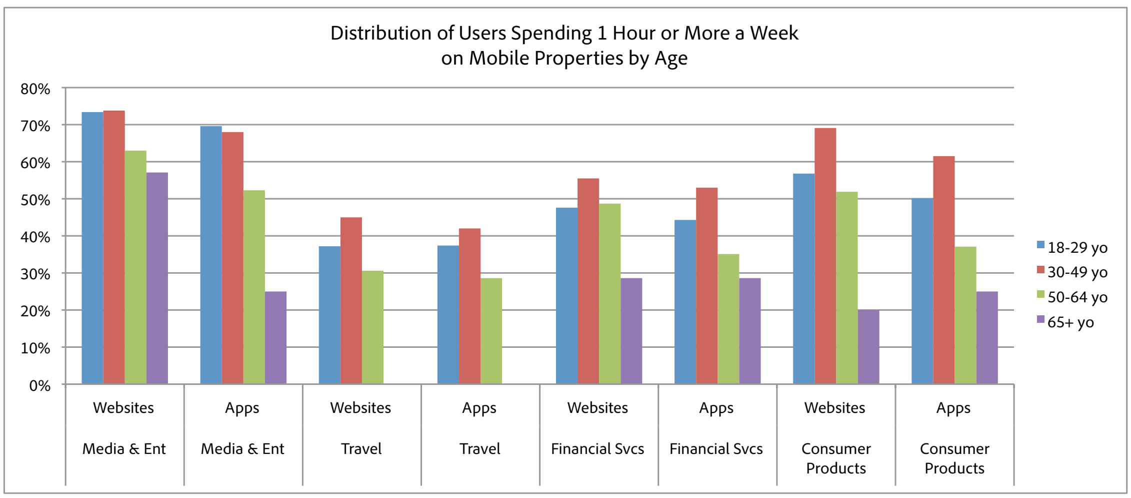
Media & Entertainment was again the most popular category by time spent. Consumer Products/ Shopping ranks second; Financial Services, third.

iPhone owners, 30-49 year olds and men generally interact the most with mobile content, both by time spent and engagement with a variety of activities across each category.

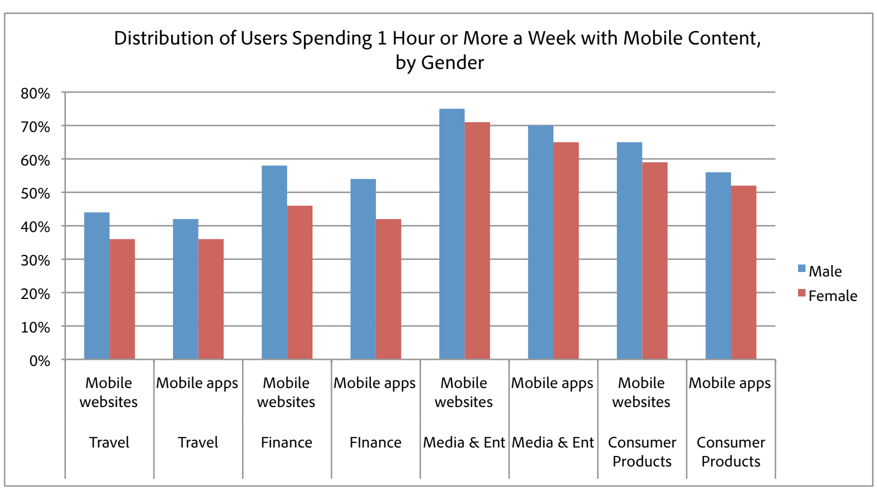
- From checking stocks to grocery shopping, iPhone/iPad owners overall interact the most with mobile content, leading their peers in all activities across Consumer Products/Shopping and the majority of Finance and Travel categories. In some Media & Entertainment areas, however, the proportion of Android device owners interacting with content is on a par with iPhone users. In other instances like social networking, the proportion of Android owners surpasses that of iPhone owners. Blackberry users check bank accounts and interact with social media on a par with iPhone users. For details on the various activities measured across device ownership, please see the device charts under each category in Appendix 2.



- 30-49 year olds interact with content in Finance, Travel and Shopping more frequently than other age groups. This group, however, consumes content on a par with 18-29 year olds in the Media & Entertainment category. The older groups, those between 50-64 years old access news and other information on a daily basis at a rate on par with 30-49 year olds. For details on the various activities measured across age groups, please see the age charts under each category in Appendix 2.



- Men spend significantly more time on Travel and Finance mobile properties than women. For details on the various activities measured across gender, please see the gender charts under each category in Appendix 2.



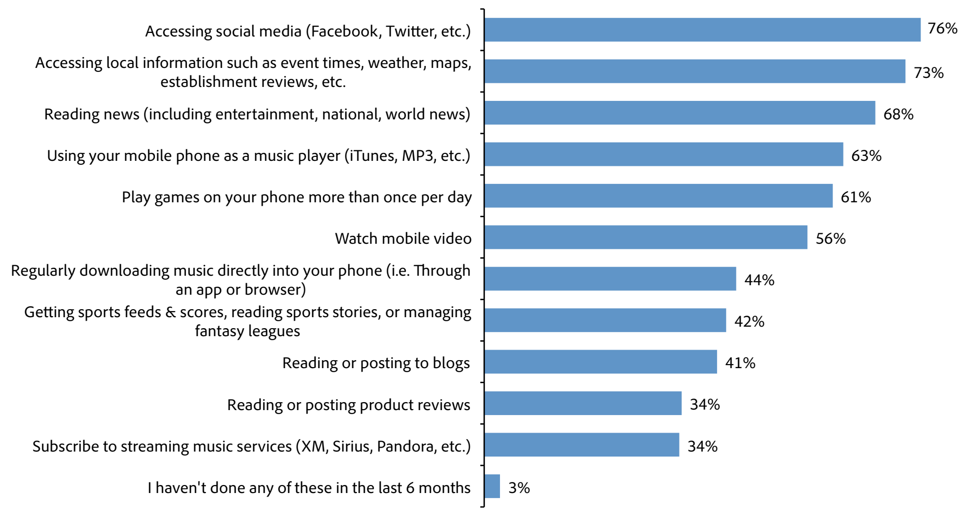
By Industry: What are they actually doing?

Media & Entertainment

The top three activities in the Media & Entertainment category are social networking (76%), accessing local information (73%), and reading news (68%).

- Using the mobile device as a music player (63%) and playing games (61%) were the next highest activities.
- More women than men and 18-29 year olds use mobile devices to access social media; men access sports feeds and other information at higher rates. Only 3% of all respondents say they have not interacted with mobile media in the last six months.

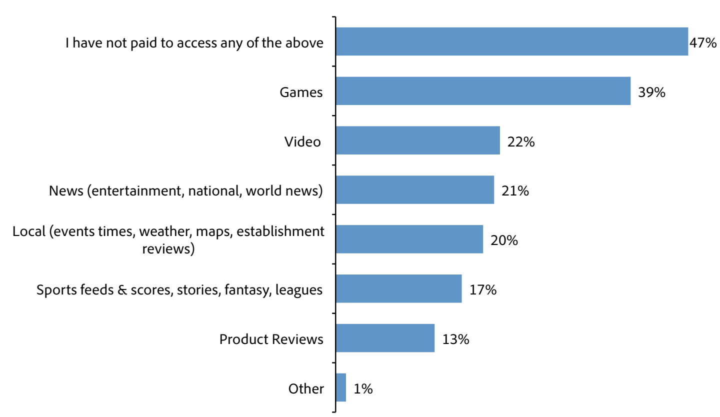
Media & Entertainment Activities Initiated from Mobile Devices



Almost half of those (47%) who perform media-related activities have not paid for media content.

- The top paid Media & Entertainment content is games, purchased by 39% of the respondents. All other content including video, news, and sports are purchased by less than 22% of the respondents.
- Significantly more men are willing to pay for media content overall than women: 53% of all women say they have not paid for mobile media and entertainment compared to 38% of men who say so. Similarly, iPhone users are more likely to pay for mobile media content overall compared to their peers.
- Three out of every four respondents say they prefer ad-supported content to paid subscriptions.

Mobile Media & Entertainment Content Purchased by Consumers
(% of users who have paid to access shown content categories)



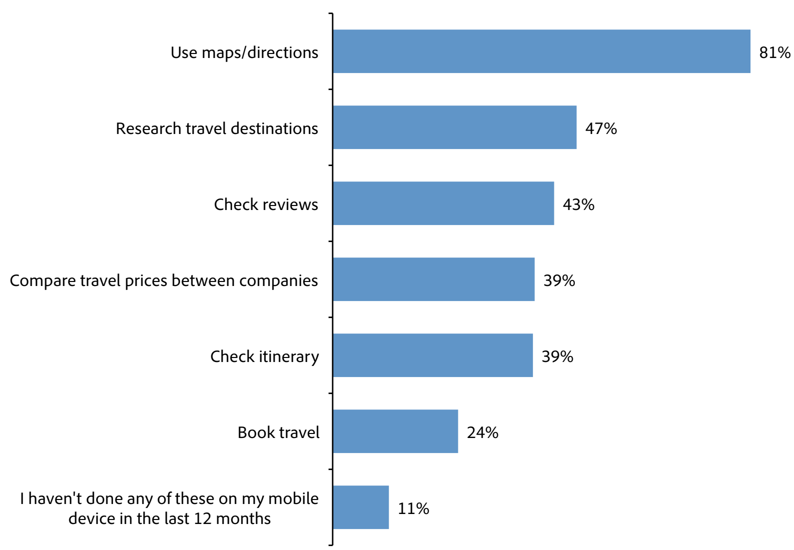
For details on the effect of gender, device and age differences on mobile media consumption, please see Appendix 2 and refer to the figures under the header, "Mobile Media & Entertainment Consumption by Gender, Device and Age."

Travel

Accessing maps and directions is the top mobile activity, used by 81% of all respondents in the last 12 months. Travel, however, is least engaging by time spent, as respondents are not interacting with other travel-related activities in high numbers.

- The travel-related activity drawing the next largest number of users is researching places and destinations, performed by 47% of respondents. About one in 10 respondents say they performed no travel-related activities from their devices in the 12 months.
- About a quarter of the respondents say they have initiated travel bookings from their mobile devices, with men more likely to do so than women (29% vs. 21%). Likewise, 18-49 year olds initiate travel bookings from their phones at higher rates than respondents 50 years or older (25% vs. 16%); 39% of iPhone users say they have tried to book travel from their devices, versus 22% of Blackberry users, the next biggest device user group that have tried to book travel from their devices.

Travel Activities Initiated from Mobile Devices
(% of users who have interacted with shown content)



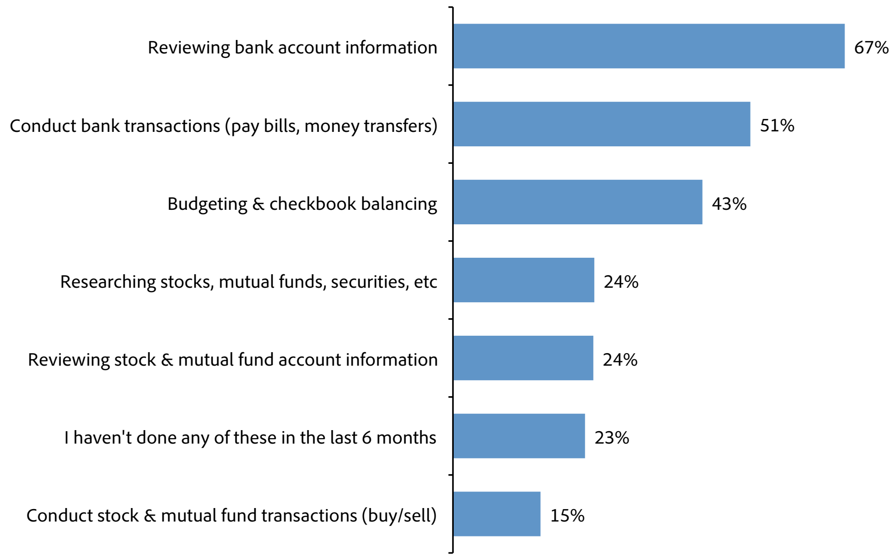
For details on the effect of gender, device and age differences on travel-related mobile content interactions, please see Appendix 2 and refer to the figures under the header, "Mobile Travel Content Consumption by Gender, Device and Age."

Finance

The top Finance activities initiated from a mobile device using an app or browser are personal banking activities.

- They include reviewing bank account information (67%); conducting bank transactions, such as bill-pay and money transfers (51%); and budgeting & checkbook balancing (43%).
- Significantly more users review their bank account information from their devices compared to all other finance activities.
- Men were more likely to research and trade stocks, mutual funds and other securities than women.

Financial-related Activities Initiated from Mobile Devices
(% of users who have interacted with shown content)



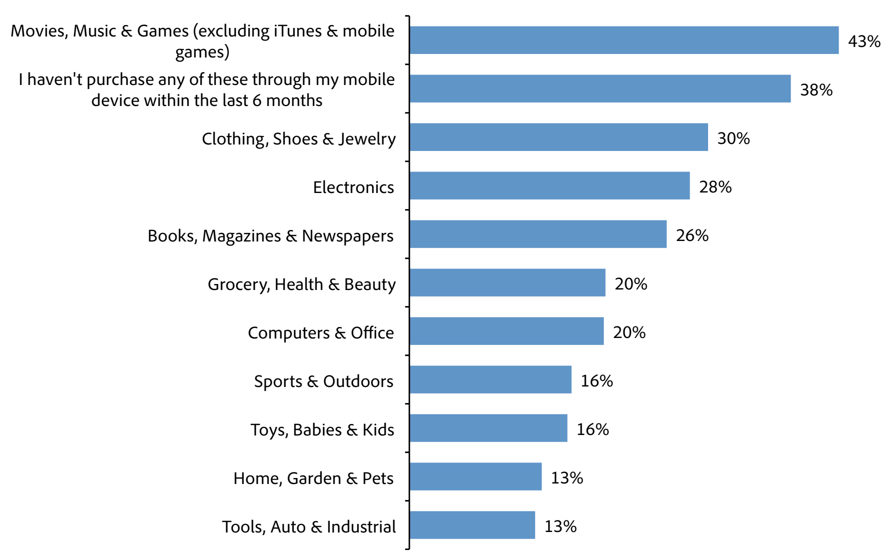
For details on the effect of gender, device and age differences on travel-related mobile content consumption, please see Appendix 2 and refer to the figures under the header, "Mobile Finance Content Consumption by Gender, Device and Age."

Mobile Shopping. Who buys? What are they buying and spending?

Shrink-wrapped entertainment, including movies, music and games, is the top hard goods category, purchased by the greatest percentage of respondents.

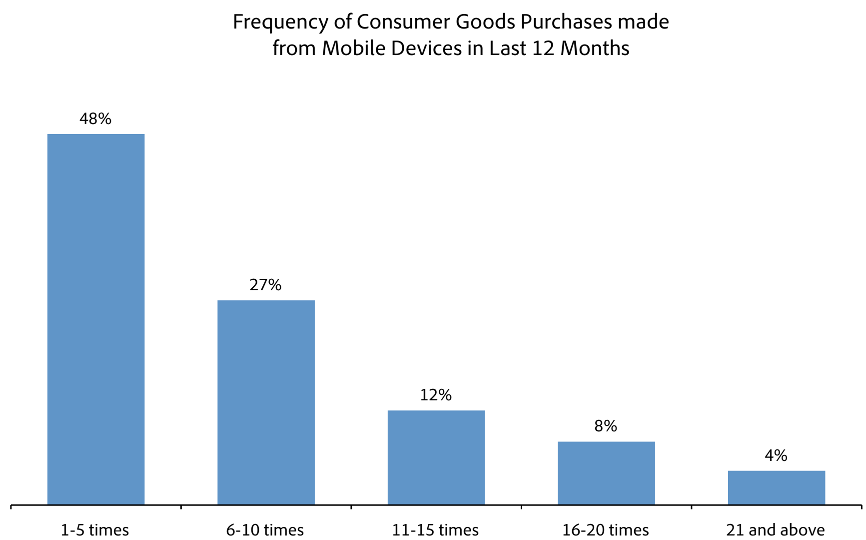
- 43% of the respondents say they have bought movies, music and games from their devices in the last six months. The next largest group (38%) say they have not purchased anything in the last six months.
- Clothing, shoes and jewelry is the second most popular category, purchased by 30% of the respondents. More men than women bought movies, games, music, electronics , tools and computer/office-related items.

Consumer Products Purchased through Mobile Devices in Last 6 Months



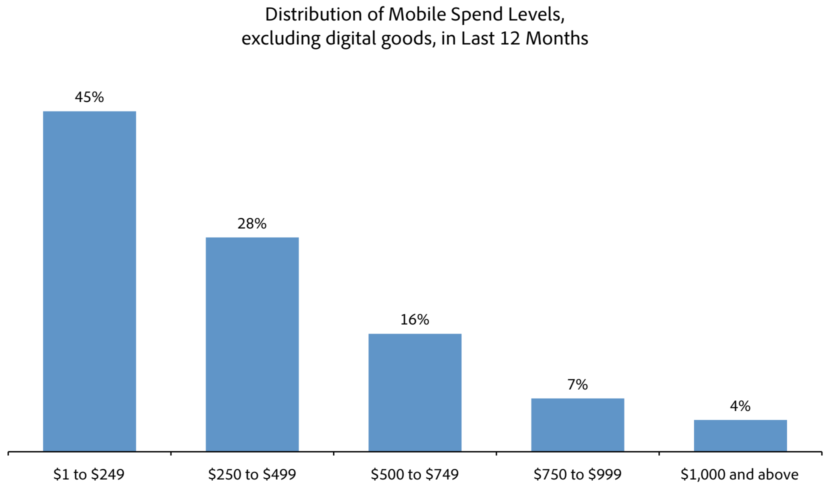
The most active shoppers tend to be male, between 30-49 years old and own an iPhone.

- Just over 50% of the respondents say they purchased at least six times from their mobile devices in the last six months, compared to those who say the same among iPhone owners (64%), men (61%) and 30-49 year olds (60%).
- Compared to other device owners, proportionally more iPhone/iPad owners purchase goods through their devices across every product category measured by the survey.
- More women than men (43 vs. 32%) have not purchased from their mobile devices.
- Of the men who made purchases in the last 12 months through their mobile devices, 61% did so at least six times compared to 44% of women who purchased at least six times in the same period.
- Older age groups (50-64 year-olds) shop significantly less in all categories, with 56% saying they have never purchased through mobile devices compared to more than 35% of 18-49 year olds who say that.



Spend levels vary by gender, device and age, with top spenders being iPhone owners, men and older consumers.

- Of those who made a consumer goods purchase in the last 12 months, the vast majority (73%) spent $499 or less.
- Compared to their peers in other age groups, more 30-64 year olds report spend levels of $250 or more in the last 12 months.
- Compared to other device users, more iPhone users report spending $250 or more in the last 12 months, followed by Blackberry users who report the same.
- Men spend more than women overall, with more than 60% having spent $250 or more in the last 12 months, versus less than 50% of women who have done so.

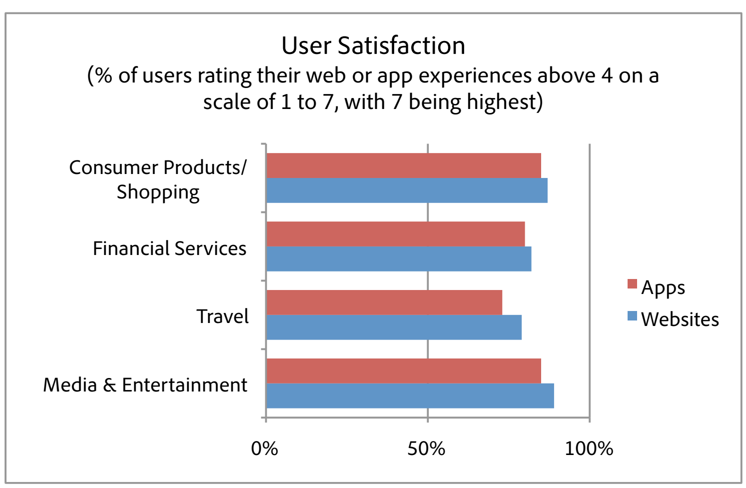


For details on how gender, device and age affect the frequency of mobile purchases, spend levels and goods purchased, please see Appendix 3.

User experience: How Satisfied are they? Who likes Apps?

Media & Entertainment and Consumer Products rank first by most satisfied users.

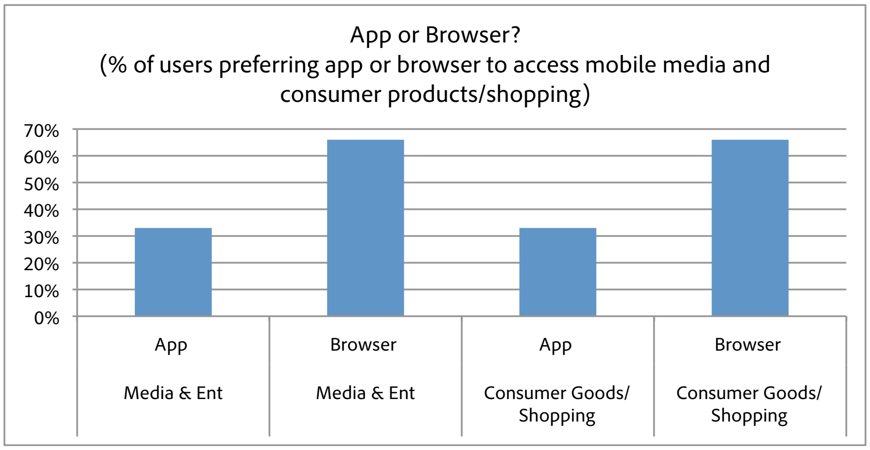
- Compared with other categories, Media & Entertainment and Consumer Products/Shopping fared best in user satisfaction, garnering the most respondents who rated their experience above average. Travel and Finance fared worst, garnering the fewest respondents rating their experience above average.
- That Financial Services and Travel drew the fewest satisfied users may be a spillover of how consumers have historically rated their experience in these categories. The results align with the historically lower satisfaction scores accorded to these industries, as measured by Forrester Research, Inc. in its annual Customer Experience Index studies[2].
- Conversely, Consumer Products/Shopping garnered the most satisfied users, as consumers have historically rated retail higher in satisfaction. As for Media & Entertainment, this category likely owes its overall popularity to its maturity. Long before smartphones were the rage, consumers enjoyed downloading music and ringtones to their phones and getting news and sports scores delivered to them through SMS. Their familiarity with media content should have a positive, reinforcing influence on the category's user perception and satisfaction.



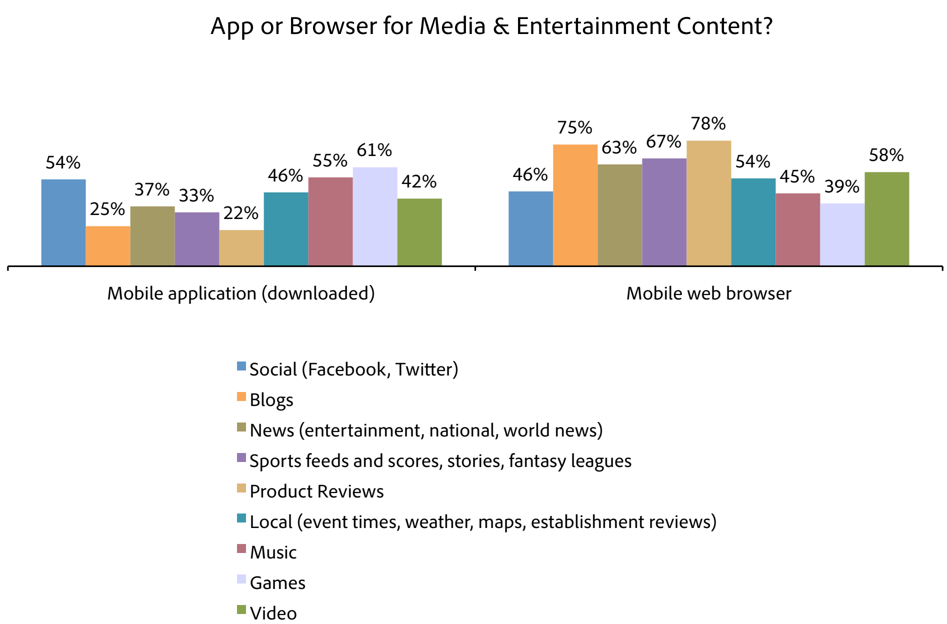
2 Airlines, banks, credit card issuers score lower in user satisfaction than retailers and hotels which ranked first and second, respectively, according to Forrester's Customer Experience Index.

Users prefer mobile browsers over downloadable mobile apps for accessing content.

- Across all categories, respondents generally prefer using mobile web browsers to downloadable mobile applications except when interacting with social media, games, maps and music.
- For the Media & Entertainment and Consumer Products/Shopping categories overall, users were asked how they prefer to access content or shop on their mobile devices. In both categories, 66% of the respondents say they prefer browsers.



A majority of respondents prefer apps for downloading games (61%), consuming music (55%) and social networking (54%). The differences in user preference for using apps or browsers to access maps were not statistically significant (see Travel section in Appendix 4 for more information).



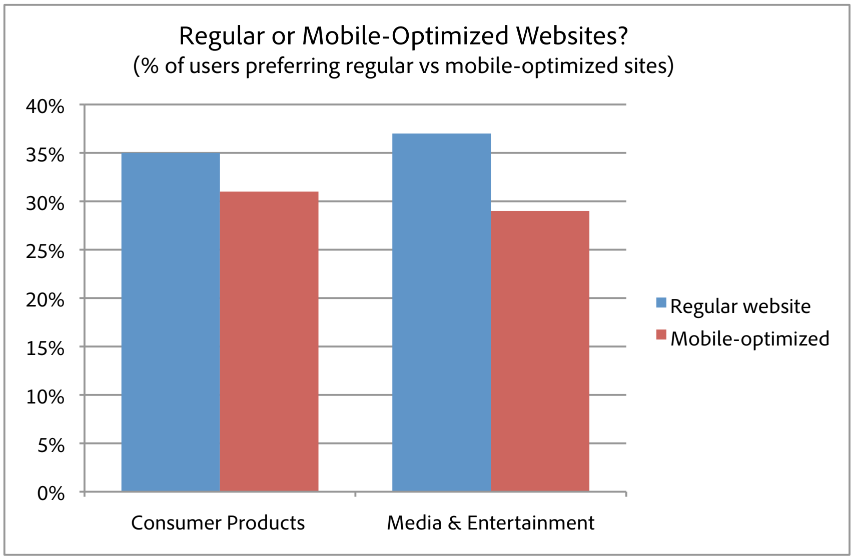
When users are segmented by age and device, preferences for apps are more pronounced:

- The majority of respondents say they use browsers as their entry point to access content, but Android users are nearly split in their usage of browsers and apps to access Media & Entertainment and Consumer Products/Shopping content for the first time. Additionally, all user groups except Windows Mobile and Blackberry say they prefer applications over browsers for accessing maps.
- While iPhone and Android users generally prefer using browsers to access content in all the categories measured, as a group, they tend to favor apps for shopping at a higher rate compared to their peers.

For details on browser and app preferences measured across various activities, please see the charts under the section "Browser vs Apps" in Appendix 4. For details on the preferred consumer product/shopping experience by device segmentation, please see "Preferred Shopping Experiences" section in Appendix 4.

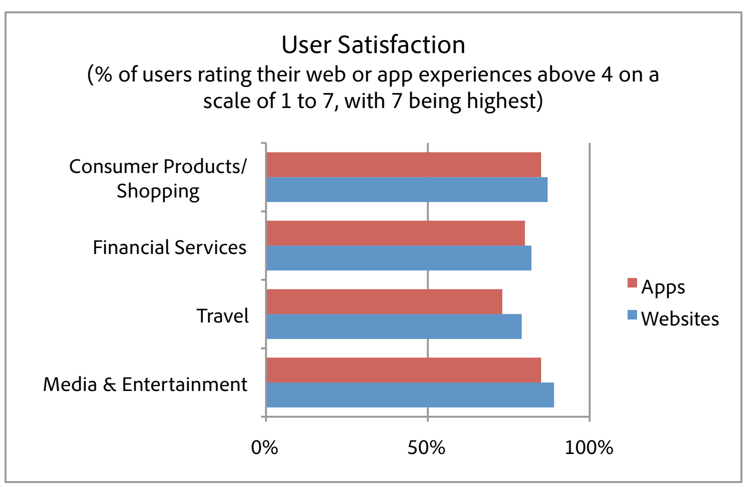
Consumers are not differentiating between mobile-optimized and PC-optimized websites.

- For the Media & Entertainment and Consumer Products/Shopping categories, respondents were asked whether they prefer mobile apps, regular website or mobile-optimized websites for accessing content. Respondents chose regular websites at slightly higher rates, suggesting a low awareness of optimized experiences for the mobile web.

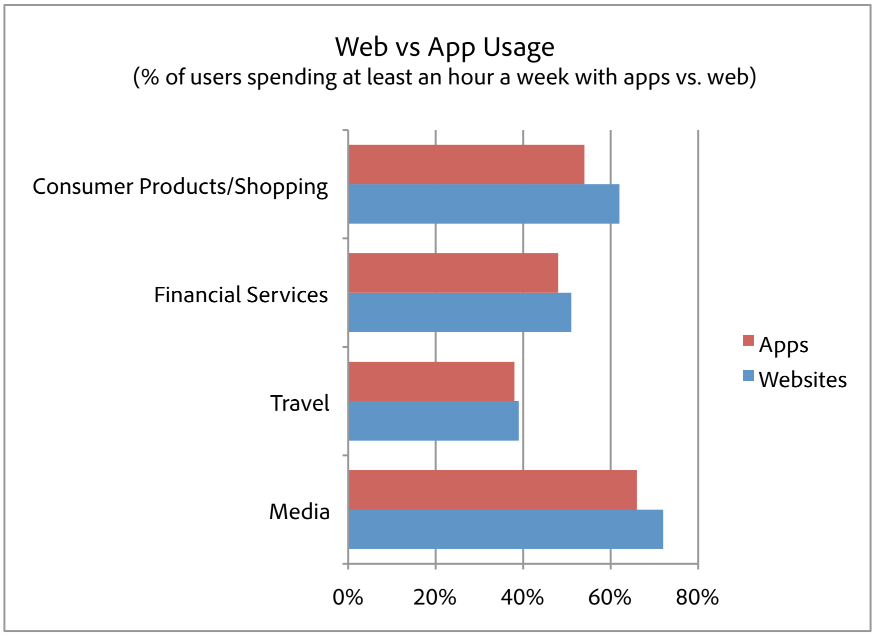


Despite their reputed superior user experience, apps are not engaging consumers more by time spent compared to the mobile web nor are they delivering greater satisfaction.

- Reported user satisfaction for the browser versus app experience generally tracks one another pretty closely not only in the aggregate but also across device, gender and age.
- For example, 89% of Media & Entertainment consumers reported above average satisfaction with their mobile website experience compared to 85% who reported the same for their mobile app experience, a difference that is not statistically significant.



- In general, respondents report spending nearly equal time with websites and apps across all categories.



Users most satisfied with their app and web experiences tend to interact with content the most.

- Across every category, iPhone owners and 30-49 year olds are most consistently satisfied with their app and web experiences compared to their peers. One exception is the browser experience in the Travel category, where equal percentages of iPhone and Palm owners rate their experience above average. As well, the percentage of satisfied users in the shopping category is about equal across most age groups.
- Men are generally more satisfied than women, particularly comparing their experiences with Travel and Consumer Products/Shopping apps.

For details on user satisfaction across device, age and gender, please see "User Satisfaction" section in Appendix 4.

Appendix 1: Survey Participants Profile

Demographic summary:

- Participants skew young and female
- Male participants skew older

	% of total	Age groups as % of total			
		18-29	30-49	50-64	65+
Male	41%	39%	47%	13%	1%
Female	59%	51%	39%	9%	>1%

Mobile device ownership:

- A majority own browser-enabled smartphones
- Android skews young, with majority of its owners between 18-29 years old
- iPhone/iPad ownership skews male
- 78% of males own touchscreen devices versus 72% of females

	Android	Blackberry	iPhone/iPad	Palm	Symbian	Windows Mobile	Other
Total	20%	25%	35%	13%	3%	4%	1%
Male	20%	22%	41%	4%	1%	4%	8%
Female	19%	26%	31%	4%	1%	3%	16%

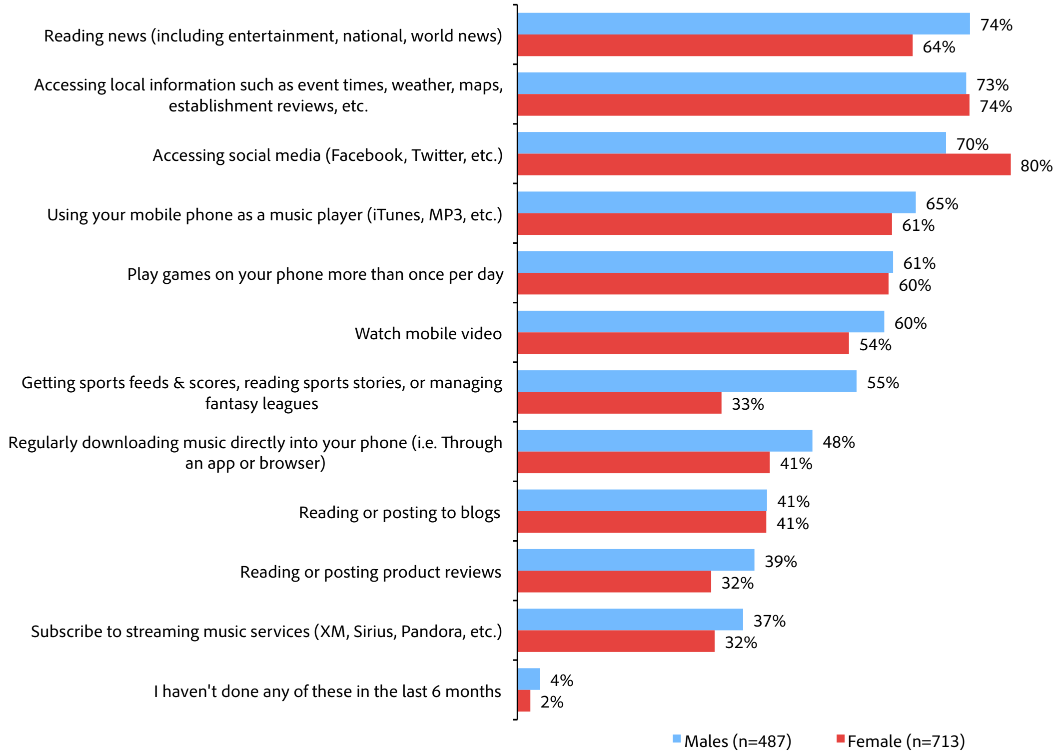
	Android	Blackberry RIM	iPhone/iPad	Palm	Symbian (e.g., Nokia)	Windows Mobile	Other
18-29	23%	22%	35%	3%	1%	3%	13%
30-49	17%	27%	39%	4%	1%	3%	10%
50-64	15%	29%	18%	7%	3%	7%	22%
65+	11%	11%	33%	0%	0%	0%	44%

% of users owning touchscreen devices: 75%			
Male		Female	
78%		72%	
18-29	30-49	50-64	65+
78%	75%	59%	78%

Appendix 2: Most Active Mobile Consumers

Mobile Media & Entertainment Consumption by Gender, Device and Age

Media & Entertainment Activities Initiated from Mobile Device via Mobile Application or Browser in Last 6 Months, By Gender



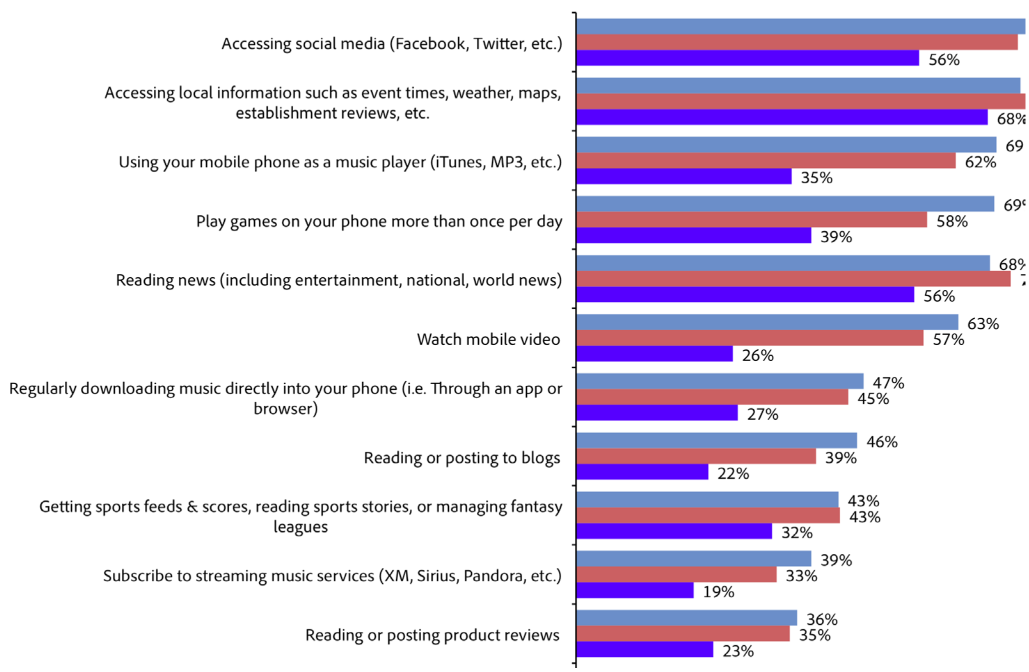
Media & Entertainment Activities Initiated from Mobile Device via Mobile Application or Browser in Last 6 Months, By Device

	Accessing social media (Facebook, Twitter, etc.)	Accessing local information such as event times, weather, maps, establishment reviews, etc.	Play games on your phone more than once per day	Watch mobile video	Reading news (including entertainment, national, world news)	Using your mobile phone as a music player (iTunes, MP3, etc.)	Subscribe to streaming music services (XM, Sirius, Pandora, etc.)
Android	85%	80%	70%	69%	68%	67%	48%
Blackberry Rim	77%	71%	54%	44%	68%	50%	26%
iPhone	78%	78%	72%	69%	75%	79%	46%
Other	63%	62%	31%	30%	53%	42%	5%
Palm	66%	66%	64%	57%	64%	59%	27%
Symbian	50%	56%	56%	38%	75%	50%	6%
Windows Mobile	61%	59%	49%	46%	59%	44%	10%

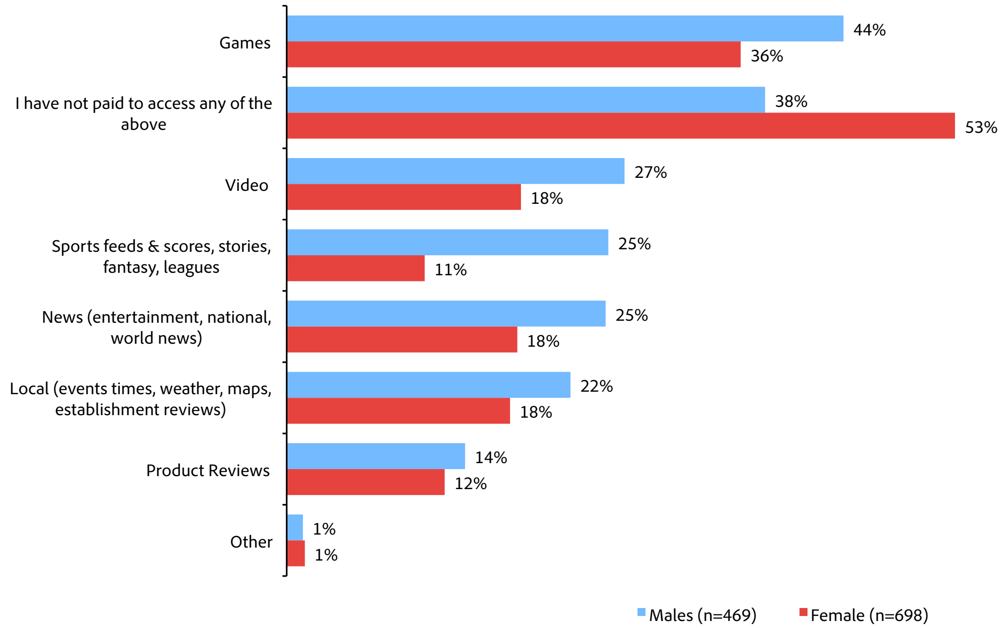
Media & Entertainment Activities Initiated from Mobile Device via Mobile Application or Browser in Last 6 Months, By Device (cont'd)

	Regularly downloading music directly into your phone (i.e. Through an app or browser)	Reading or posting to blogs	Getting sports feeds & scores, reading sports stories, or managing fantasy leagues	Reading or posting product reviews	I haven't done any of these in the last 6 months
Android	46%	44%	41%	34%	0%
Blackberry Rim	35%	36%	39%	31%	2%
iPhone	59%	51%	53%	47%	0%
Other	22%	26%	21%	13%	10%
Palm	39%	30%	36%	25%	5%
Symbian	19%	31%	31%	38%	13%
Windows Mobile	34%	20%	44%	22%	10%

Media & Entertainment Activities Initiated from Mobile Device via Mobile Application or Browser in Last 6 Months, By Age



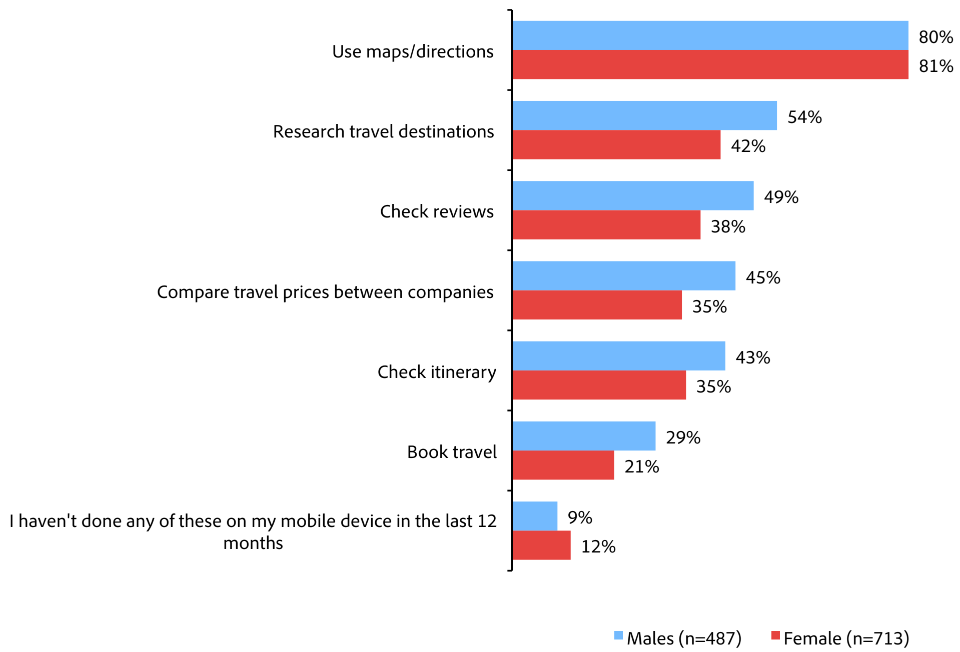
Mobile Media & Entertainment Content Purchased, by Gender
(% of users who have ever paid to access content)



Media & Entertainment Activities Initiated from Mobile Device via Mobile Application or Browser in Last 6 Months, By Device

	I have not paid to access any of the above	Games	Video	Local (events times, weather, maps, establishment reviews)	News (entertainment, national, world news)	Sports feeds & scores, stories, fantasy, leagues	Product Reviews	Other
Android	57%	35%	18%	15%	14%	14%	9%	1%
Blackberry Rim	51%	32%	16%	18%	23%	15%	12%	1%
iPhone	32%	51%	33%	26%	28%	25%	20%	1%
Other	62%	30%	10%	16%	11%	4%	4%	2%
Palm	55%	33%	14%	14%	14%	10%	10%	0%
Symbian	36%	29%	29%	14%	21%	7%	14%	14%
Windows Mobile	57%	30%	16%	14%	14%	11%	5%	3%

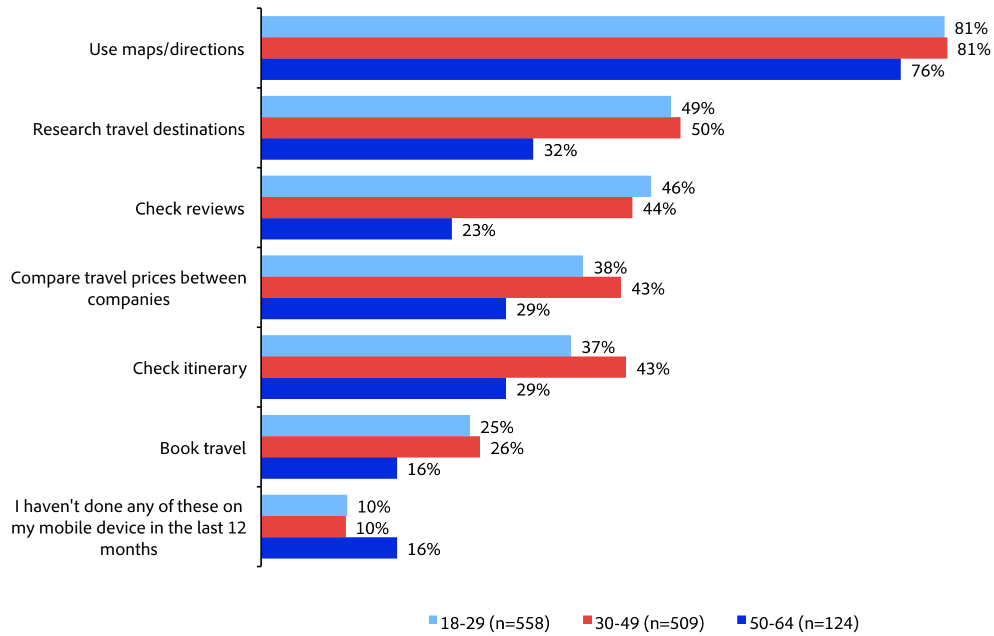
Travel-related Activities Initiated from Mobile Device via Mobile Application or Browser in Last 12 Months, By Gender



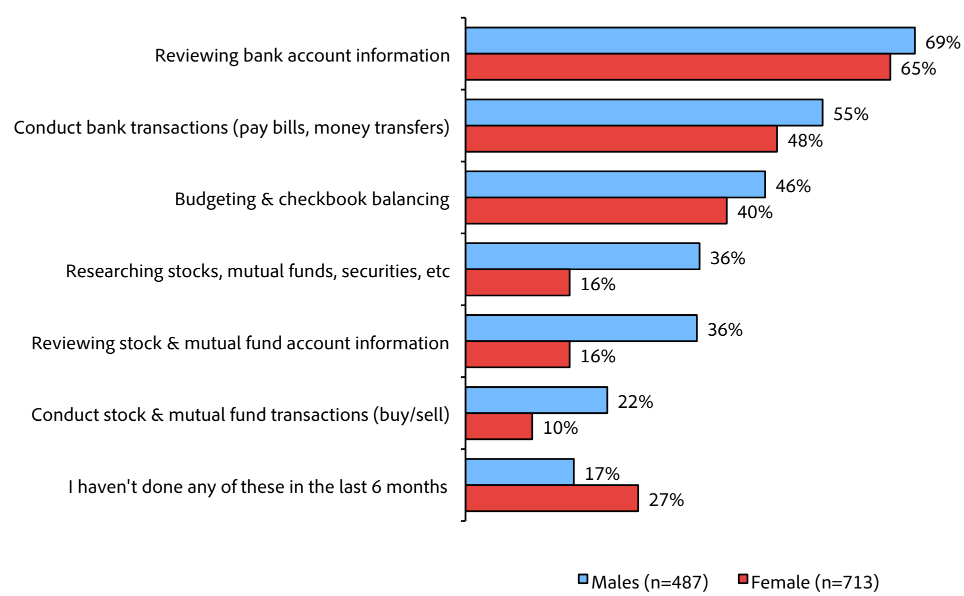
Travel-related Content Purchased, by Device (% of users who have ever paid to access content)

	Android	Blackberry RIM	iPhone/iPad	Palm	Symbian (e.g., Nokia)	Windows Mobile	Other
Book travel	19%	22%	39%	9%	19%	15%	3%
Research travel destinations	48%	46%	59%	39%	25%	34%	22%
Check itinerary	33%	42%	50%	23%	38%	24%	17%
Compare travel prices between companies	31%	37%	56%	27%	38%	15%	16%
Check reviews	43%	38%	56%	34%	44%	32%	19%
Use maps/ directions	85%	83%	83%	84%	75%	73%	63%
I haven't done any of these on my mobile device in the last 12 months	8%	9%	6%	11%	6%	24%	30%

Travel-related Activities Initiated from Mobile Device via Mobile Application or Browser in Last 12 Months, By Age



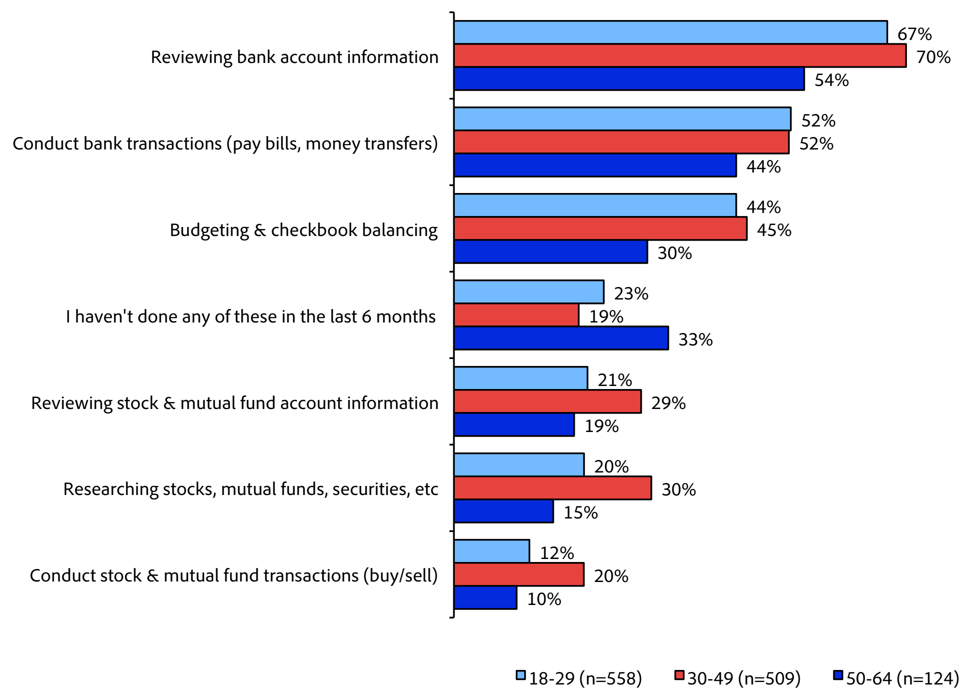
Finance-related Activities Initiated from Mobile Device via Mobile Application or Browser In Last 6 Months, By Gender



Finance-related Activities Initiated from Mobile Device via Mobile Application or Browser In Last 6 Months, By Device

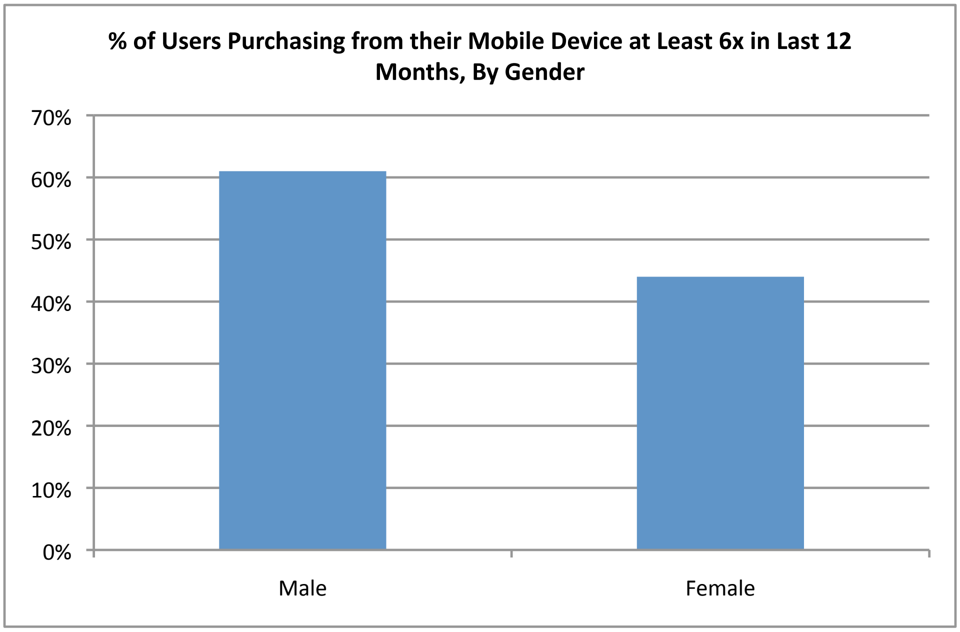
	Reviewing bank account information	Conduct bank transactions (pay bills, money transfers)	Budgeting & checkbook balancing	I haven't done any of these in the last 6 months	Researching stocks, mutual funds, securities, etc	Reviewing stock & mutual fund account information	Conduct stock & mutual fund transactions (buy/sell)
Android	67%	48%	39%	23%	22%	18%	9%
Blackberry Rim	72%	49%	41%	21%	17%	19%	13%
iPhone	75%	65%	55%	11%	38%	41%	27%
Other	38%	26%	20%	52%	5%	1%	1%
Palm	57%	36%	41%	30%	18%	11%	5%
Symbian	56%	38%	38%	38%	25%	25%	13%
Windows Mobile	68%	39%	34%	27%	17%	17%	7%

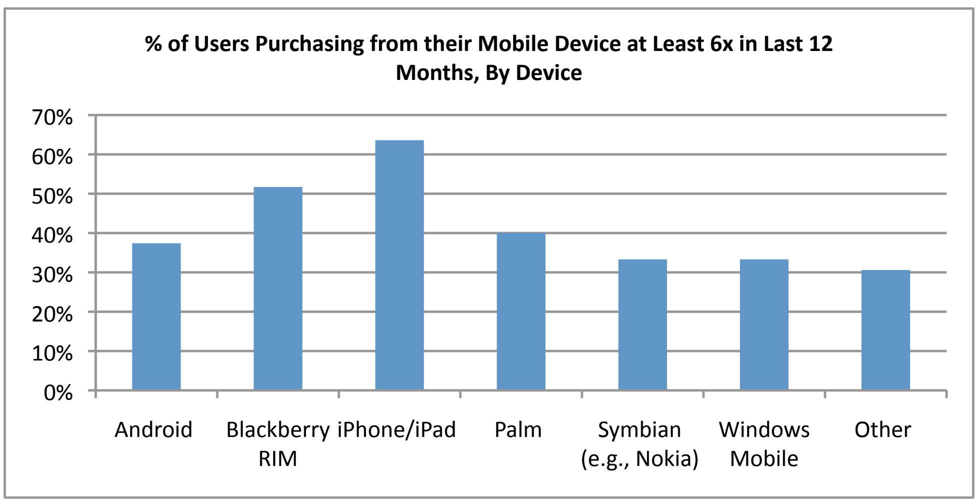
Finance-related Activities Initiated from Mobile Device via Mobile Application or Browser In Last 6 Months, By Age

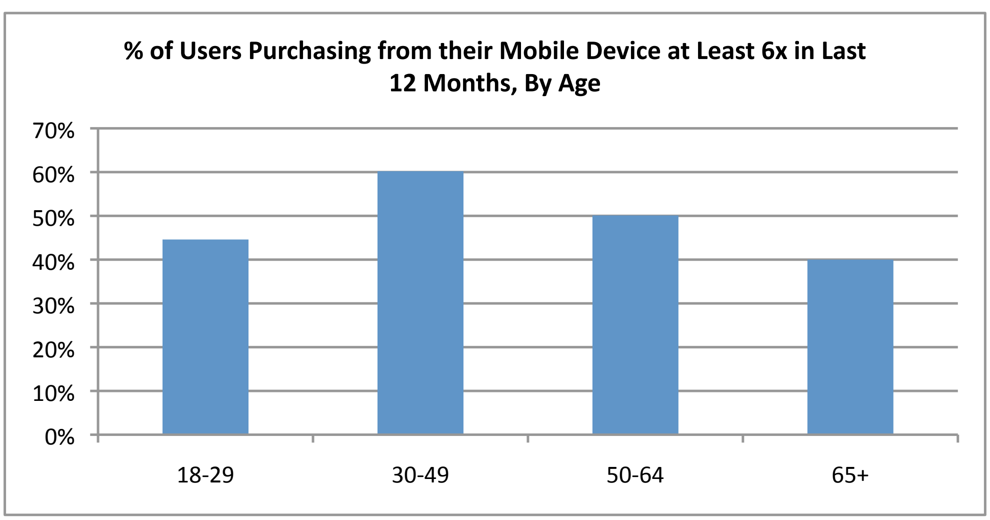


Appendix 3: Mobile Shopping and Purchases

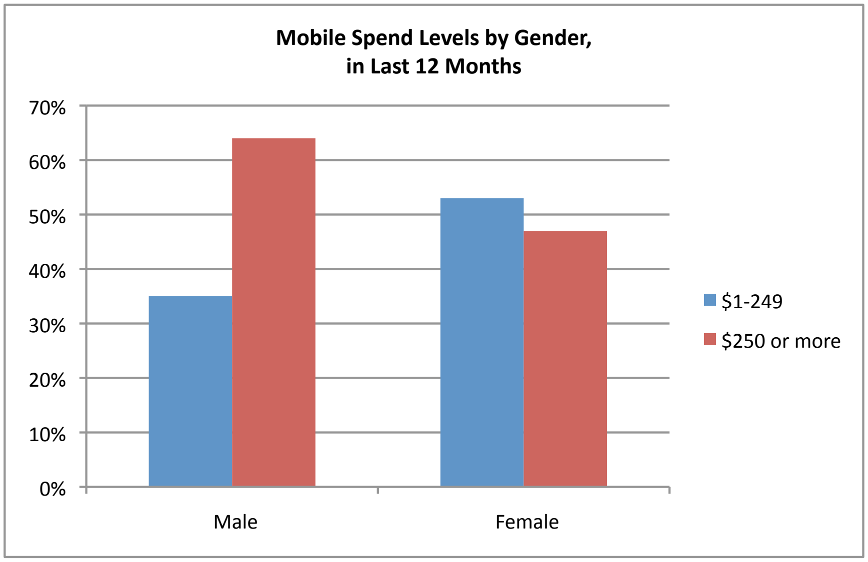
Frequency of Mobile Purchases by Gender, Device, and Age

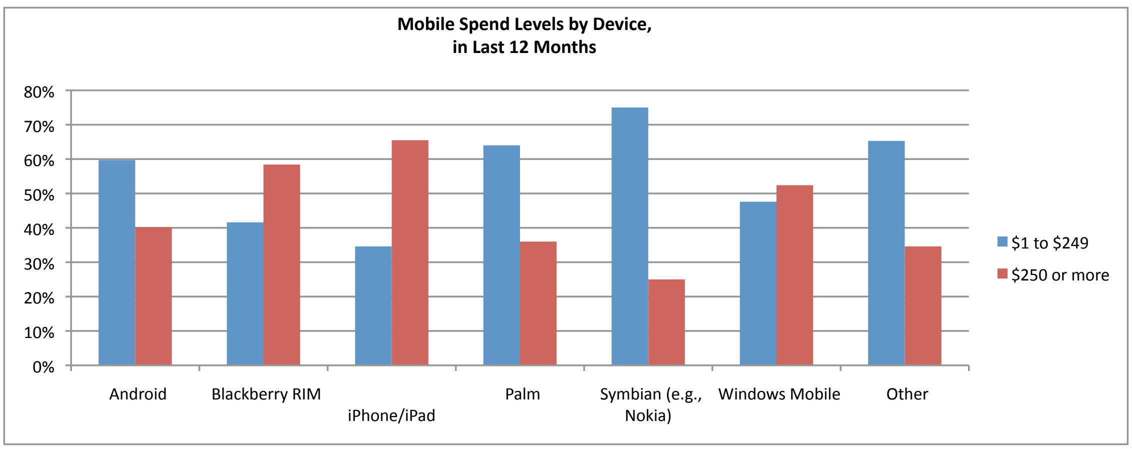


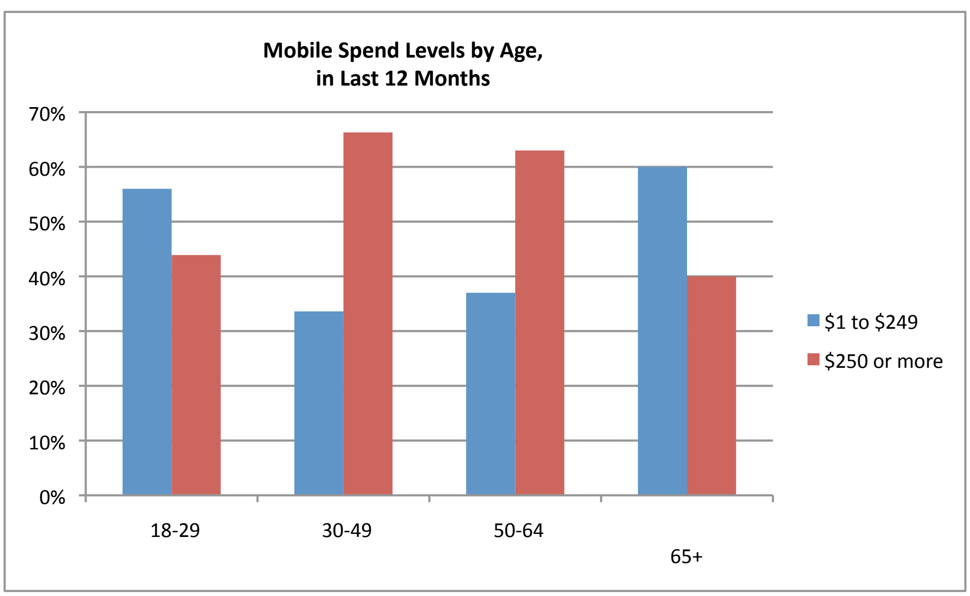


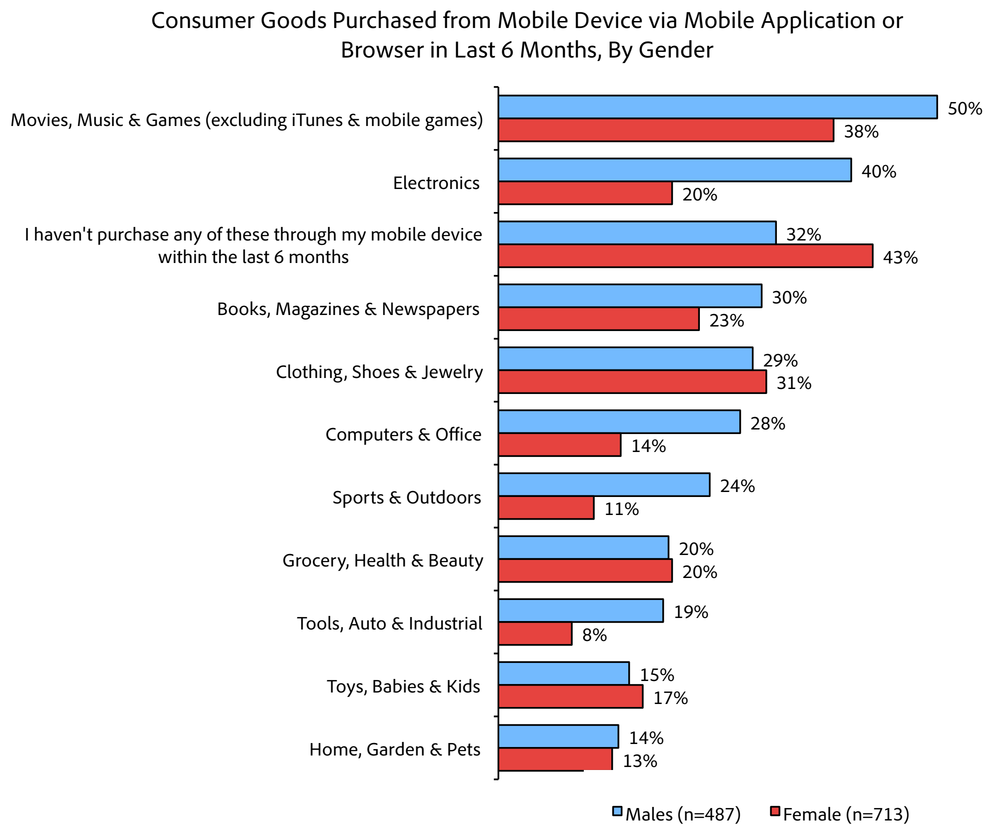


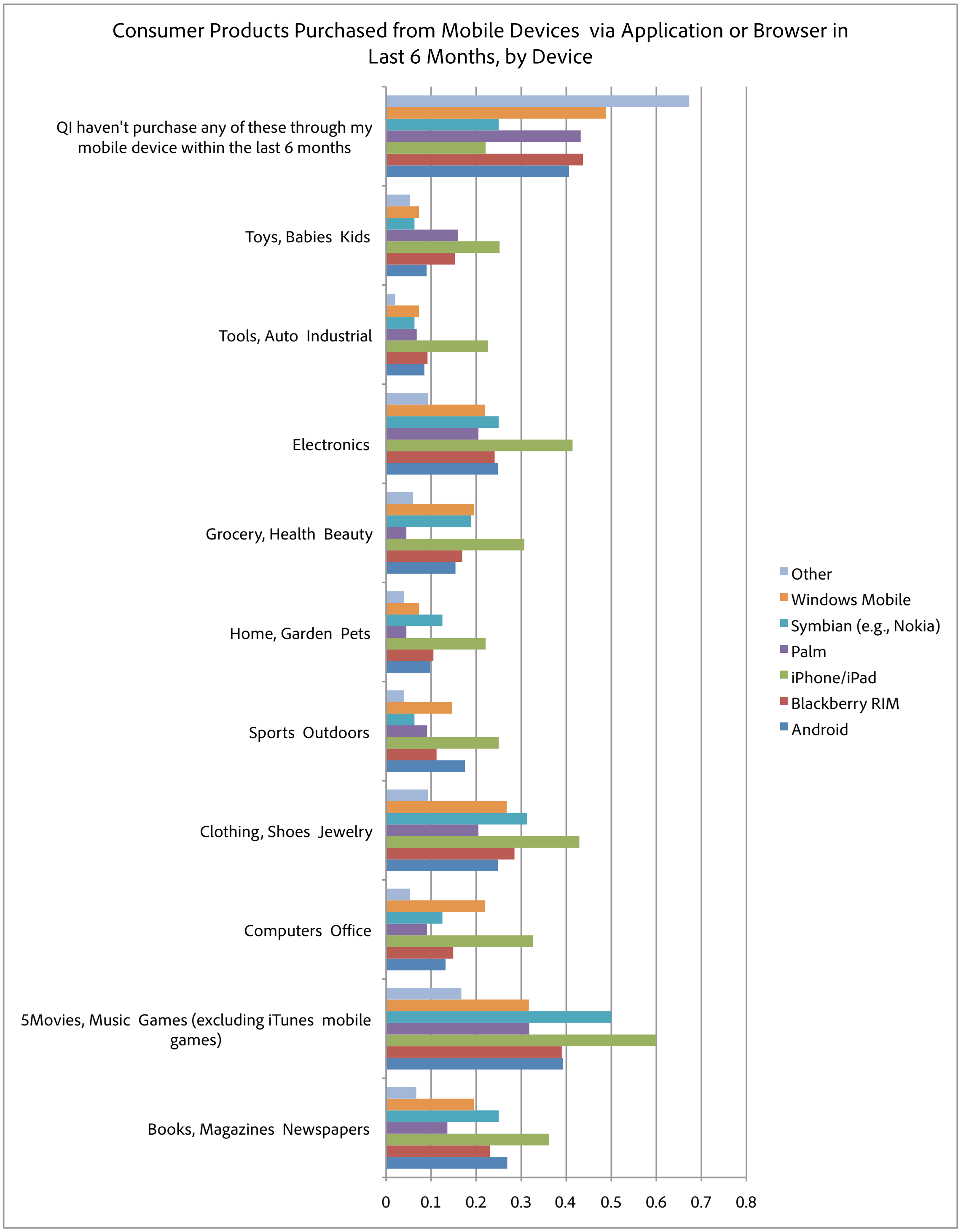
Mobile Spend by Gender, Device and Age



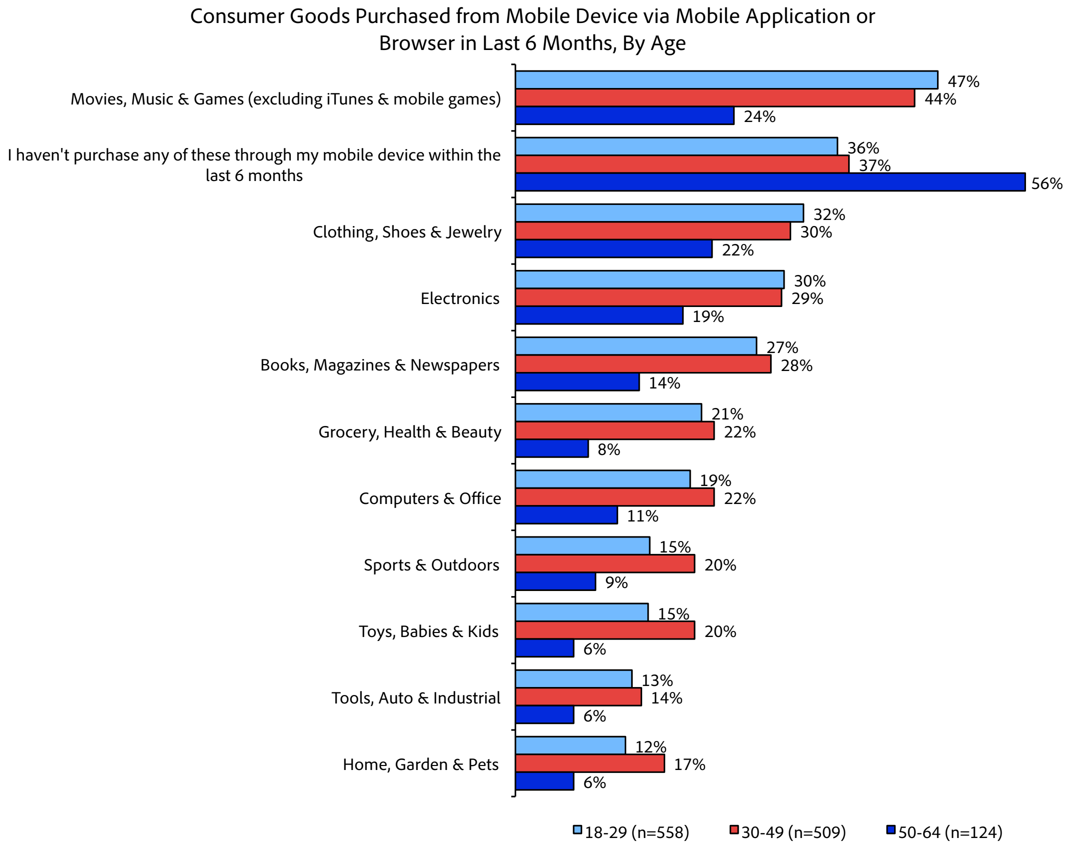





Consumer Goods Purchased from Mobile Device via Mobile Application or Browser in Last 6 Months, By Gender
Movies, Music & Games (excluding iTunes & mobile games)
50%
38%
Electronics
40%
20%
I haven't purchase any of these through my mobile device within the last 6 months
32%
43%
Books, Magazines & Newspapers
30%
23%
Clothing, Shoes & Jewelry
29%
31%
Computers & Office
28%
14%
Sports & Outdoors
24%
11%
Grocery, Health & Beauty
20%
20%
Tools, Auto & Industrial
19%
8%
Toys, Babies & Kids
15%
17%
Home, Garden & Pets
14%
13%
Males (n=487)
Female (n=713)



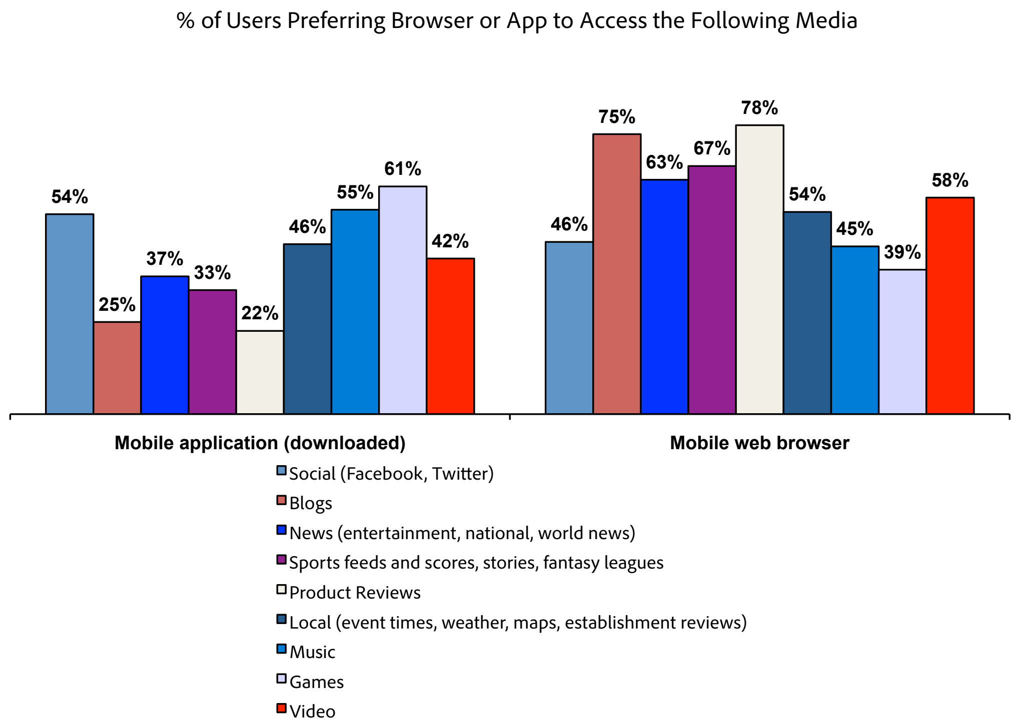
Consumer Products Purchased from Mobile Devices via Application or Browser in Last 6 Months, by Device
QI haven't purchase any of these through my mobile device within the last 6 months
Toys, Babies Kids
Tools, Auto Industrial
Electronics
Grocery, Health Beauty
Home, Garden Pets
Sports Outdoors
Clothing, Shoes Jewelry
Computers Office
5Movies, Music Games (excluding iTunes mobile games)
Books, Magazines Newspapers
0
0.1
0.2
0.3
0.4
0.5
0.6
0.7
0.8
Other
Windows Mobile
Symbian (e.g., Nokia)
Palm
iPhone/iPad
Blackberry RIM
Android

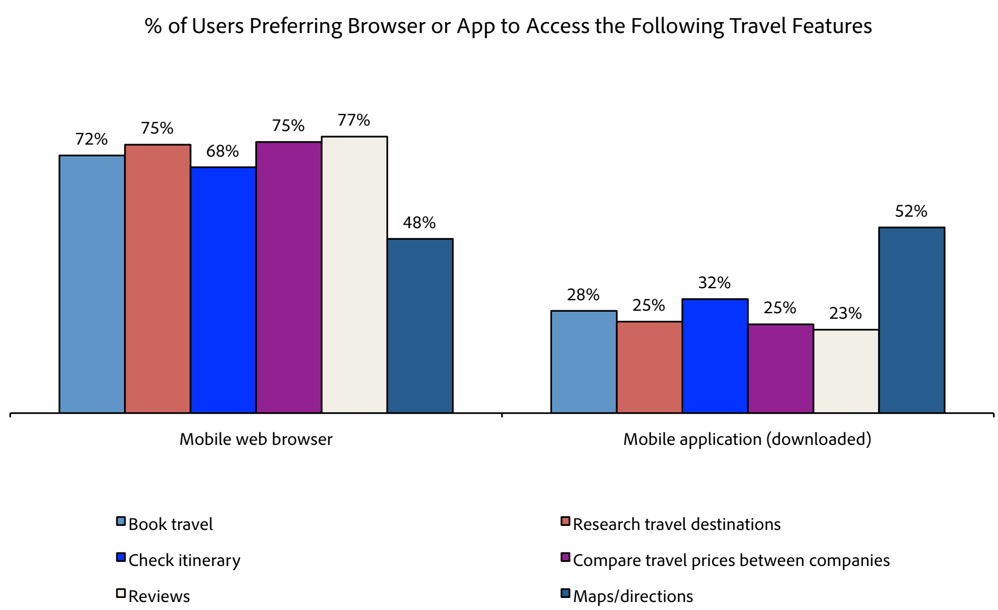


Consumer Goods Purchased from Mobile Device via Mobile Application or Browser in Last 6 Months, By Age
Movies, Music & Games (excluding iTunes & mobile games)
47%
44%
24%
I haven't purchase any of these through my mobile device within the last 6 months
36%
37%
56%
Clothing, Shoes & Jewelry
32%
30%
22%
Electronics
30%
29%
19%
Books, Magazines & Newspapers
27%
28%
14%
Grocery, Health & Beauty
21%
22%
8%
Computers & Office
19%
22%
11%
Sports & Outdoors
15%
20%
9%
Toys, Babies & Kids
15%
20%
6%
Tools, Auto & Industrial
13%
14%
6%
Home, Garden & Pets
12%
17%
6%
18-29 (n=558)
30-49 (n=509)
50-64 (n=124)

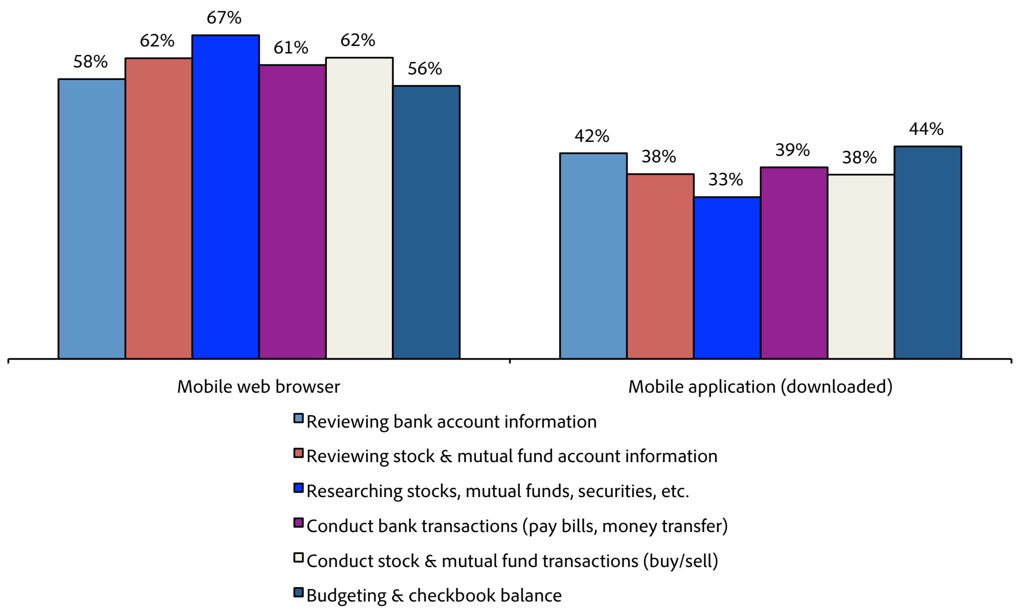
Appendix 4: User Experience

Browser vs. Apps

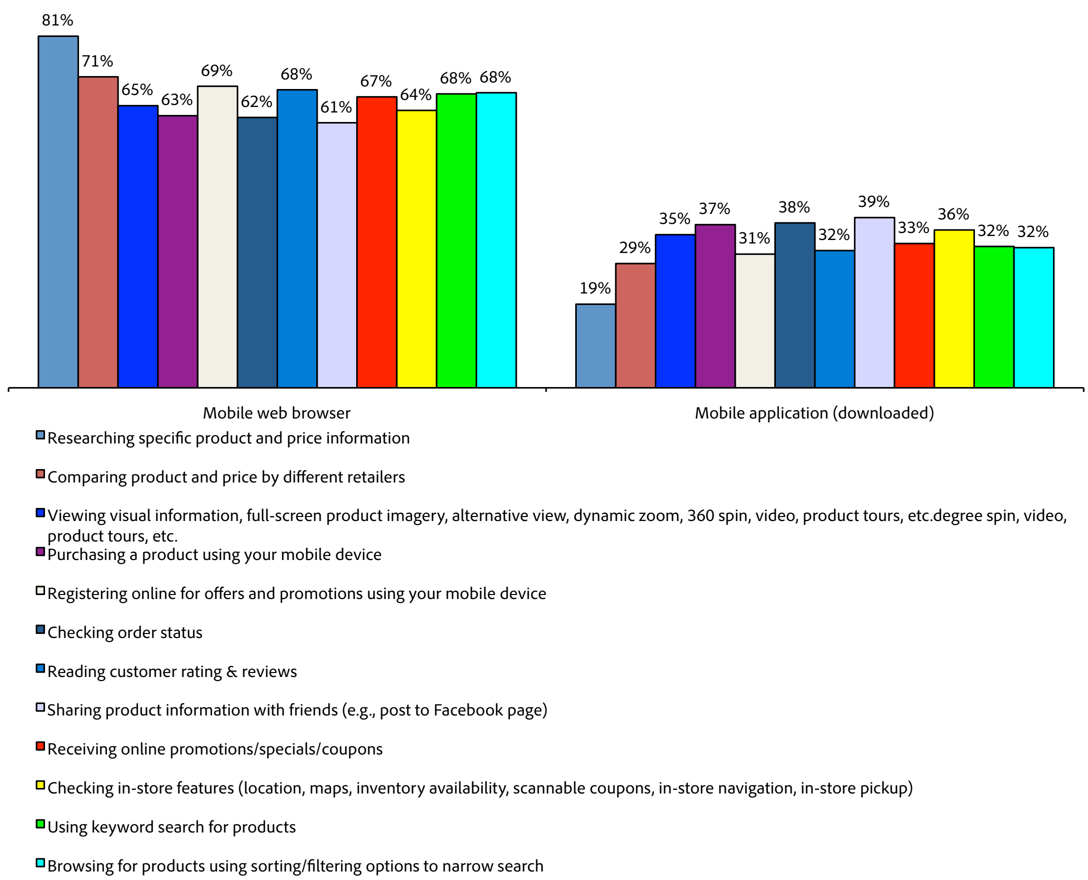




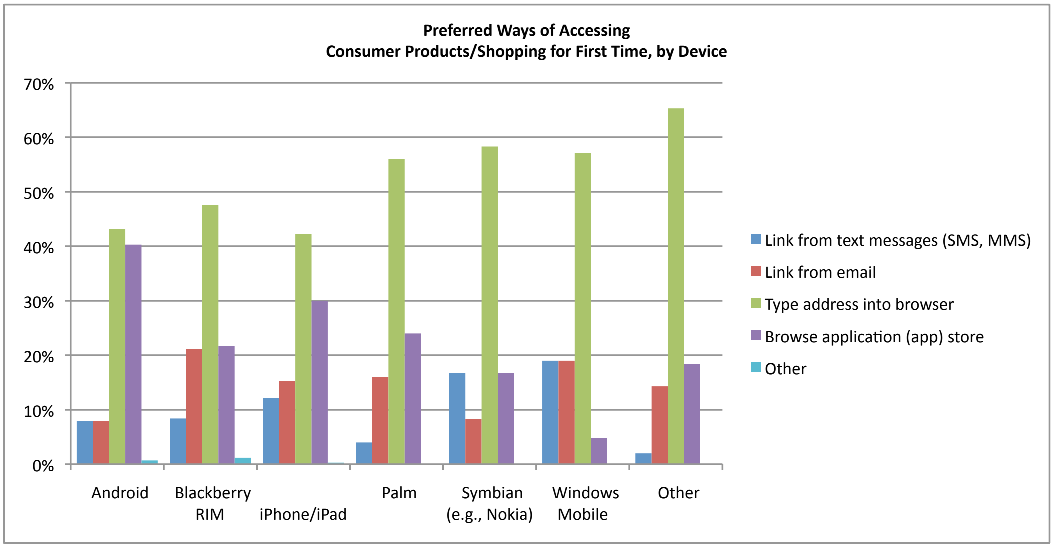
% of Users Preferring Browser or App to Access the Following Financial Features

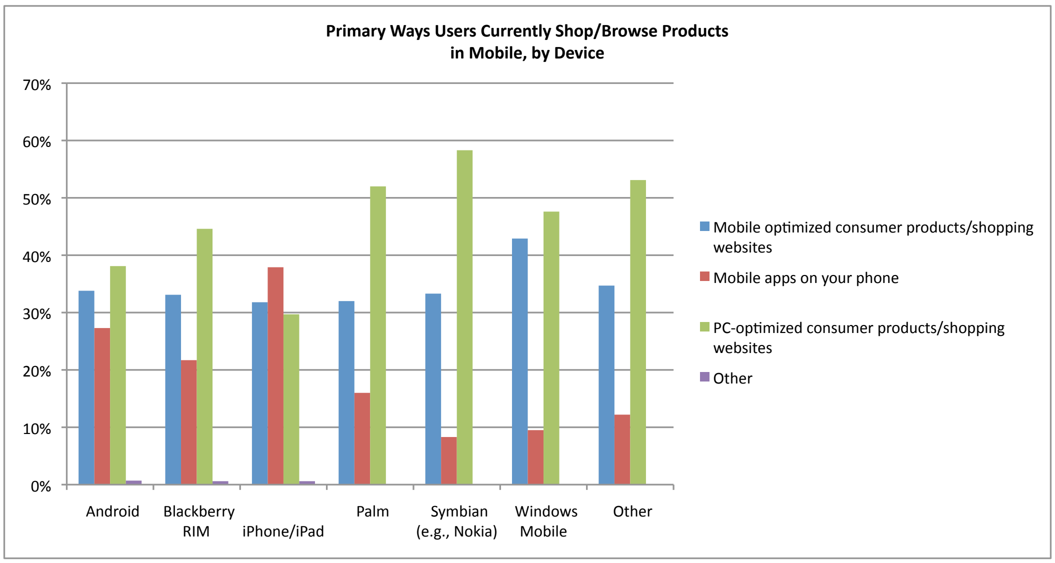


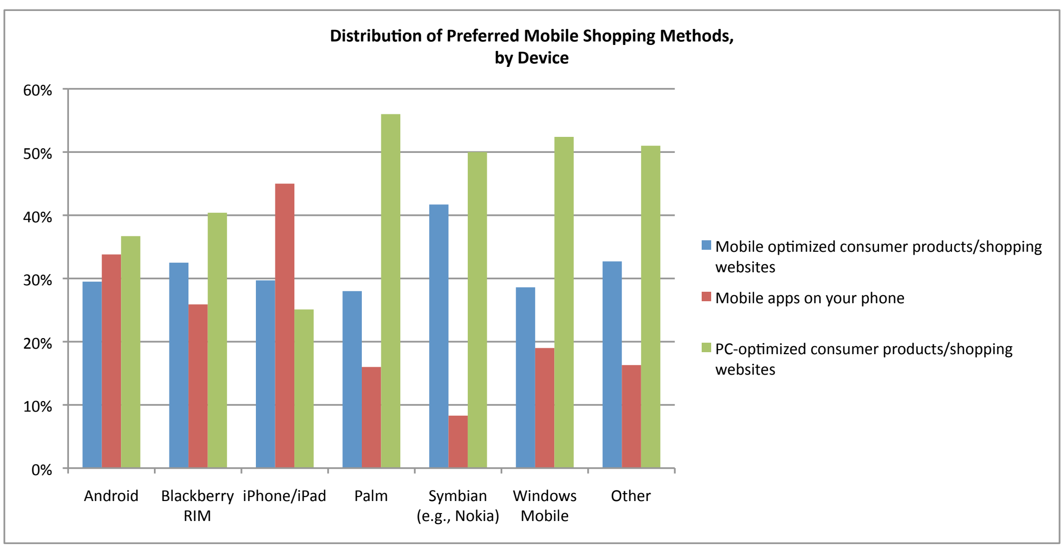
% of Users Preferring Browser or App to Perform the Following Shopping Tasks



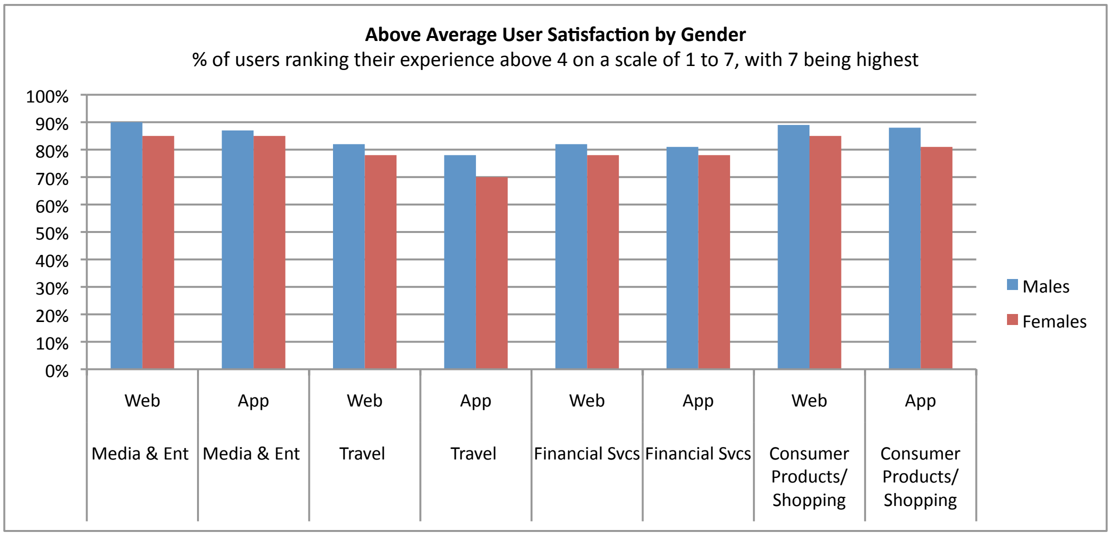
Preferred Shopping Experiences, by Device

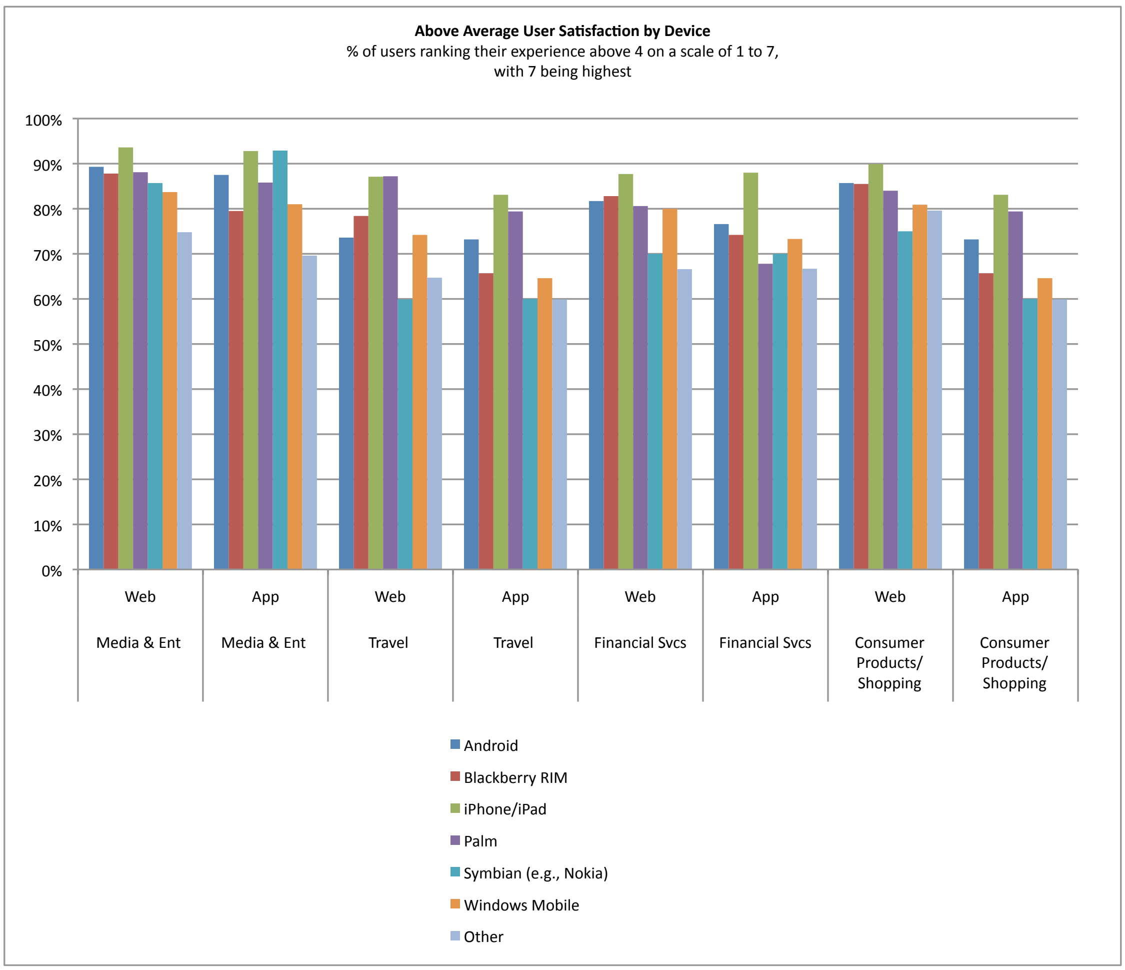


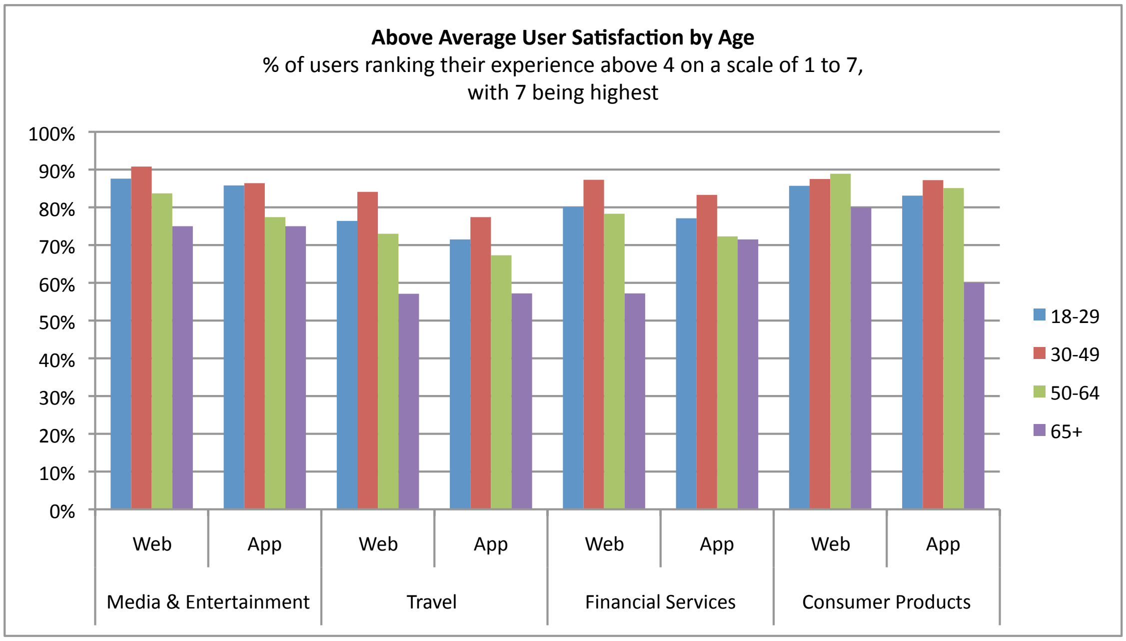




User Satisfaction for Apps vs. Web by Gender, Device, Age






Above Average User Satisfaction by Age
% of users ranking their experience above 4 on a scale of 1 to 7,
with 7 being highest
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Web
App
Web
App
Web
App
Web
App
Media & Entertainment
Travel
Financial Services
Consumer Products
18-29
30-49
50-64
65+

Further in-depth Mobile Shopping Research

A supplemental report derived from the same panel study further analyzes mobile shopping behavior and preferences. Please email: s7marketing@adobe.com if you are interested in receiving this additional research.

About the Adobe Online Marketing Suite

The Adobe® Online Marketing Suite, powered by Omniture®, offers an integrated and open platform for online business optimization, a strategy for using customer insight to drive innovation throughout the business and enhance marketing efficiency. The Suite consists of integrated applications to collect and unleash the power of customer insight to optimize customer acquisition, conversion and retention efforts as well as the creation and distribution of content. For example, using the Suite, marketers can identify the most effective marketing strategies and ad placements as well as create relevant, personalized and consistent customer experiences across digital marketing channels, such as onsite, display, e-mail, social, video and mobile. The Suite enables marketers to make quick adjustments, automate certain customer interactions and better maximize marketing ROI, which, ultimately, can positively impact the bottom line. www.omniture.com

About Adobe Scene7

The Adobe Scene7 cross media publishing platform is the industry-leading solution for delivering dynamic content to any channel – web, email, print and mobile. With Scene7, businesses can improve the entire selling and marketing cycle from attracting customers, to guiding them to the right products and services, to successfully converting them into loyal buyers. Scene7 is performance optimized to dynamically generate and deliver unlimited variations from master imagery—shortening time to market and drastically reducing costs. Solutions for managing, enhancing and delivering dynamic media include Scene7 Publishing System, Media Portal, Dynamic Imaging, Dynamic Banners, eCatalogs, eVideos, Visual Configurators, Web-to-Print, Web & Social, Email & Print, and Mobile & Multi-Screen. Leading companies using Adobe Scene7 solutions include QVC, Harrods, Macy's, Office Depot, Polo Ralph Lauren, La-Z-Boy, Blockbuster, VF Corporation and Levi Strauss & Co. For more information about the Adobe Scene7 cross media platform, visit www.scene7.com.

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