MEF
MOBILE ECOSYSTEM FORUM

FULL REPORT

MOBILE APPS USER SURVEY

2021

FOREWORD

Smartphones have moved the mobile telephony game along so much further than ever was conceived all those decades ago when truly portable devices appeared. Whilst it's undeniable that many of today's devices are beautifully designed, the real game-changer has been the stuff you can't physically see from the outside. I am of course talking about applications - apps. Android rules the roost in terms of app downloads but it's the sheer variety of apps today that is frankly mindblowing.

The days of the reason for being of a mobile phone being pure basic communication (think texting and speaking) alone have been well and truly consigned to annals of history. Think of anything you can do on the internet today and thanks to the millions of apps available and widespread mobile internet coverage globally, those capabilities move seamlessly over to mobile. Over half of all internet visits today are carried out using mobile devices, smartphones leading the way here.

Personally I have played on Xbox for 19 years now (since the beginning here in the UK) but have never taken my gaming mobile. Thankfully for companies everywhere, I am an exception as you'll see from the report that gaming just pips listening to music to the post as the absolute top smartphone activity, chosen by 68% of all the 6,500 people globally across 10 countries surveyed.

This all means that at best, 1/3 of smartphone owners still need that little bit of extra encouragement to start doing things new to them, so there is clear headroom for growth. Much of this comes back to ease of use and given the rapid (genuine) digital transformation that was forced upon so many given the measures put in place to limit the spread of COVID-19, millions of people new to the online digital world have found themselves thrust into it. My mother (in her 80s) is one of them and is now perhaps rather too proficient with her smartphone and that well known chat app...

Talking about chat apps, had I not seen the findings of the report, I would never have believed that those in the 55+ year age group access social media at least once per week, more than any other. It might appear that the real youth of today are leading the way here but leave it to the silver surfers. A surprising reality. So keep an eye out for this. And something enterprises really need to understand and get their heads around properly in their customer engagement channel mix. WhatsApp Business messaging and the like should not just be aimed at younger demographics.

One area which threw up a large disparity in how smartphones are used is something I am quite partial to myself – ordering food. What really hit me was how people in China have embraced this use case so much more than the level of the closest country surveyed, to the tune of more than 50%. 79% of people in China order food once or more per week using their smartphones. I thought I reached rather too readily for my smartphone and those food related apps but clearly I have some way to go myself!

Our Mobile Apss User Survey 2021 has some great insights and is well worth a read. But then you'd know because you're reading this! Enjoy.

JAMES WILLIAMS
DIRECTOR OF PROGRAMS

ABOUT MEF

Mobile Ecosystem Forum is **a not-for-profit global trade body** that acts as an impartial and authoritative champion for addressing issues affecting the broadening mobile ecosystem. We provide our members with a global and cross-sector platform for networking, collaboration and advancing industry solutions. The goal is to accelerate the growth of a sustainable mobile ecosystem that delivers trusted services worldwide. Established in 2000 and headquartered in the UK, MEF's members are active across Africa, Asia, Europe, Middle East, North and Latin America.

MEF provides a community that offers **Insight** (reports, surveys, market guidance); **Interaction** (events, networking, visibility) and **Impact** (advocacy, code of conducts, industry initiatives).

To join the MEF communities please email info@mobileecosystemforum.com.

Contact Sam if you'd like to contribute an article.

If you would like to explore the range of MEF Member sponsorship opportunities available at any MEF CONNECTS then please contact Susan.

Follow us on LinkedIn, register for the member area and subscribe to MEF's newsletters to keep up to date with MEF activities throughout the month.

DARIO BETTI
CEO

SUSAN FINLAYSON-SITCH
DIRECTOR OF OPERATIONS

JAMES WILLIAMS
DIRECTOR OF PROGRAMS

EWA PEPPITT
GLOBAL MEMBER MANAGER

SAM HILL
GLOBAL COMMUNICATIONS MANAGER

CAROL BENITES
MEMBER & MARKETING COORDINATOR

MIKE ROUND
PROJECT DIRECTOR REGISTRY

NIKKI BAILEY
REGISTRY OPERATION MANAGER

ANDREW PARKIN-WHITE
ADVISOR IoT

DANIEL MENSI
ADVISOR BLOCKCHAIN

DHONI IBRAHIM
DESIGNER

CONTENTS

THE MOBILE ECOSYSTEM FORUM OFFERS MARKET DATA TO ITS MEMBERS AND TO THE INDUSTRY TO PROMOTE CONSUMER UNDERSTANDING AND ADVANCING OF LONG TERM SUSTAINABLE PRACTICES AND BUSINESS MODELS

AN EXECUTIVE SUMMARY IS AVAILABLE FOR FREE TO ALL

MEF MEMBERS HAVE ACCESS TO THE FULL REPORT AND THE DATA SET

EXECUTIVE SUMMARY

MOBILE APP SURVEY : SCOPE

This report provides detailed insight and analysis into what people use their smartphone for around the world. In addition, the report also provides a deep dive analysis of 6 key uses including gaming, watching video content, and using social media.

Usage penetration for 16 different smartphone activities

Deep dive into frequency of usage for 6 key activities, including analysis by country, user gender, user age group and user profile

Analysis of barriers to greater usage including trust and confidence

The analysis looks at barriers to increased app usage as well as the end user perception of the balance between spend, risk and ease of use.

Other MEF reports to look out for in 2021 will cover areas such as Messaging, Payments, Security & Personal Data, and Data apps.

MOBILE APP USAGE - SNAPSHOT

APP USAGE. Playing games is the most popular smartphone activity, alongside social media, watching video content and listening to music.

OPPORTINITY FOR GROWTH. There is significant room to increase smartphone usage by making current activities more compelling. Globally the most popular activities are still only used by up to 68% of users.

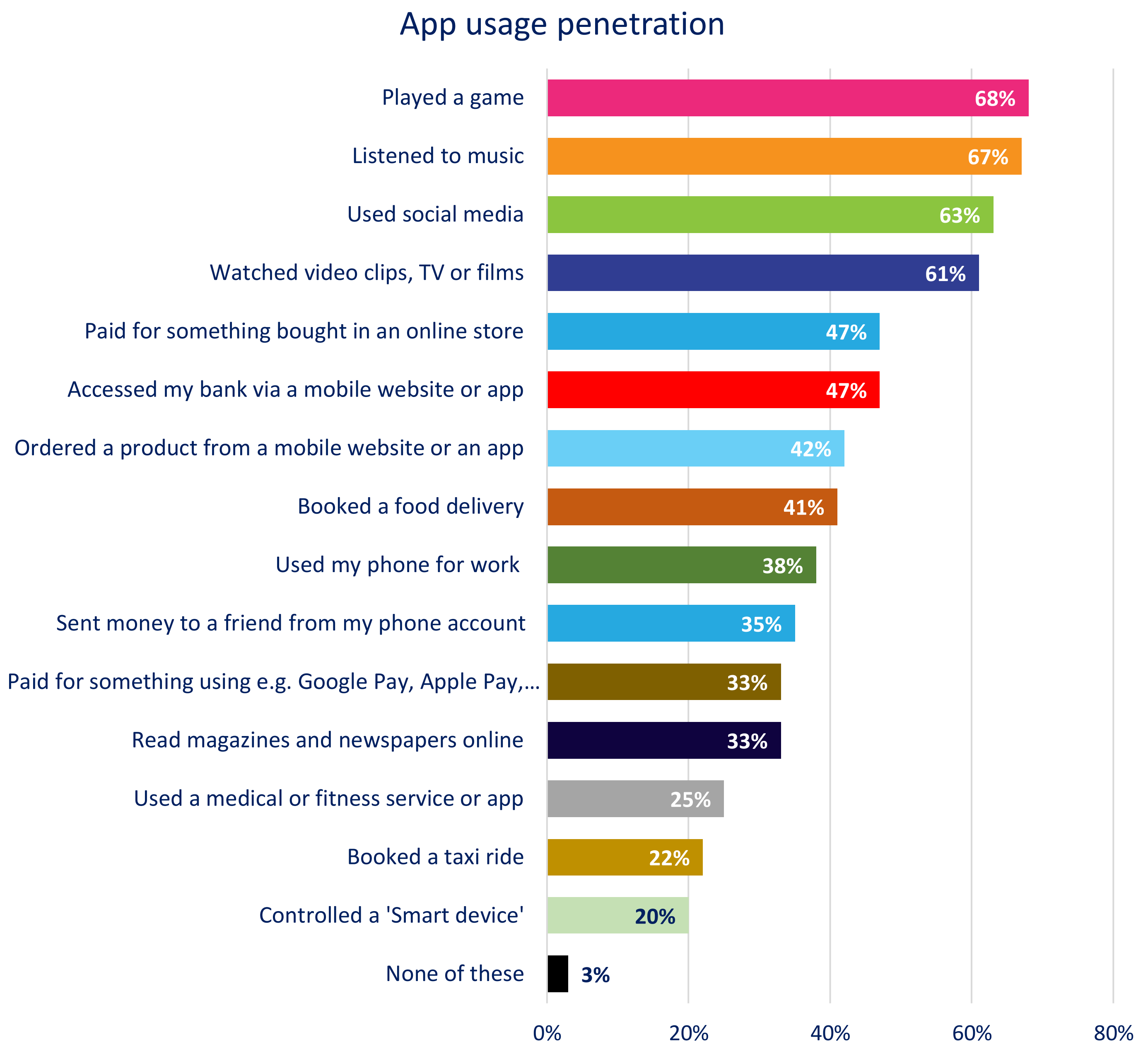
BARRIERS TO HIGHER USAGE. The biggest barrier to increased usage is that users currently don't see a need.

EASE OF USE. Most users agree that ease of use of smartphone apps and activities is important, and the overall experience is positive. Brazil appears least concerned about ease of use.

BRAZIL. Brazil presents a unique case amongst countries surveyed. All the smartphone activities are popular in Brazil, yet data costs appear to be a major constraint on frequent usage.

INNOVATION. Higher levels of smartphone usage will be driven by new innovative and compelling activities and applications.

SIGNIFICANT GROWTH OPPORTUNITY IN APP USAGE

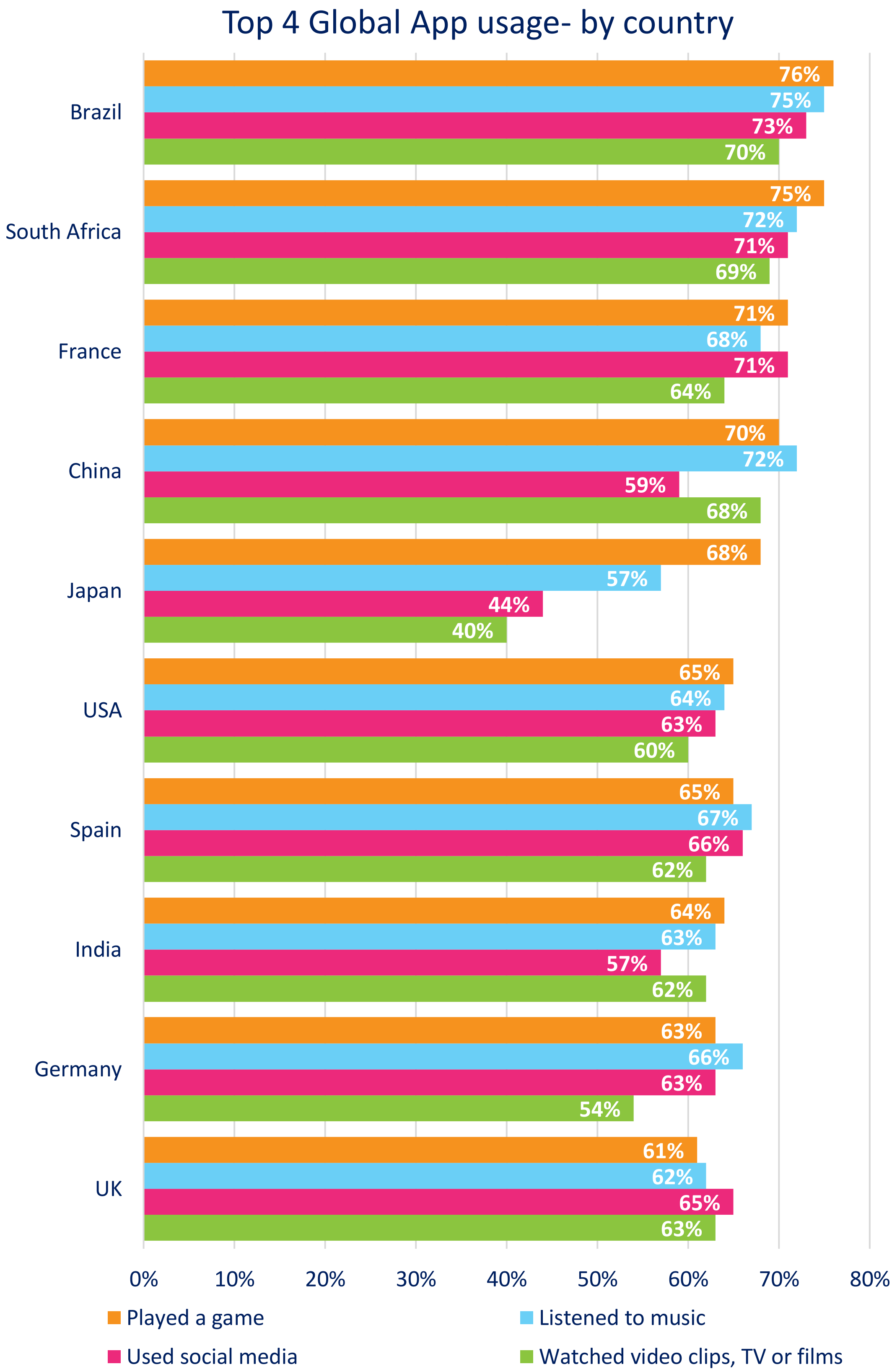


Globally around two-thirds of smartphone users have played a game, listened to music, used social media, or watched video content on their smartphone. These are the leading uses by some margin though there is still plenty of headroom for growth.

Other activities have a more significant growth opportunity and we can see emerging uses such as using fitness services and booking taxi rides starting to have a presence.

It is worth pointing out that only 3% of global smartphone users have never used their phone for any of these activities – just using their smartphone as a phone.

SOUTH AFRICA AND BRAZIL LEAD IN APP USAGE



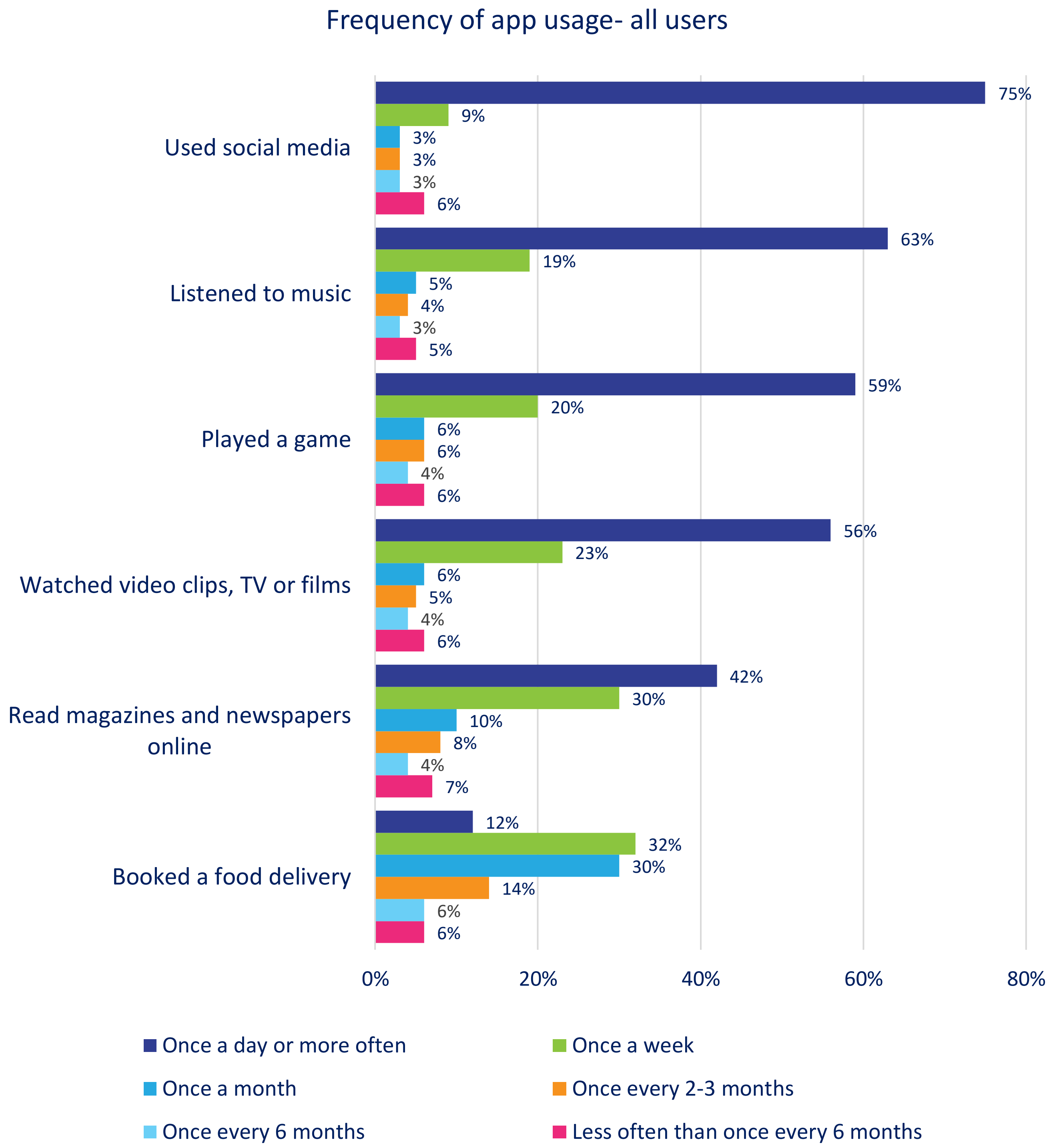
Playing games is the most popular app activity around the world, led by Brazil and South Africa.

After games though, users in Japan are far less likely to have listened to music, watched video or used social media. Watching video in Japan seems especially low at 40%.

Social media activity by app in China is also low at 59%, considering the levels for gaming and listening to music.

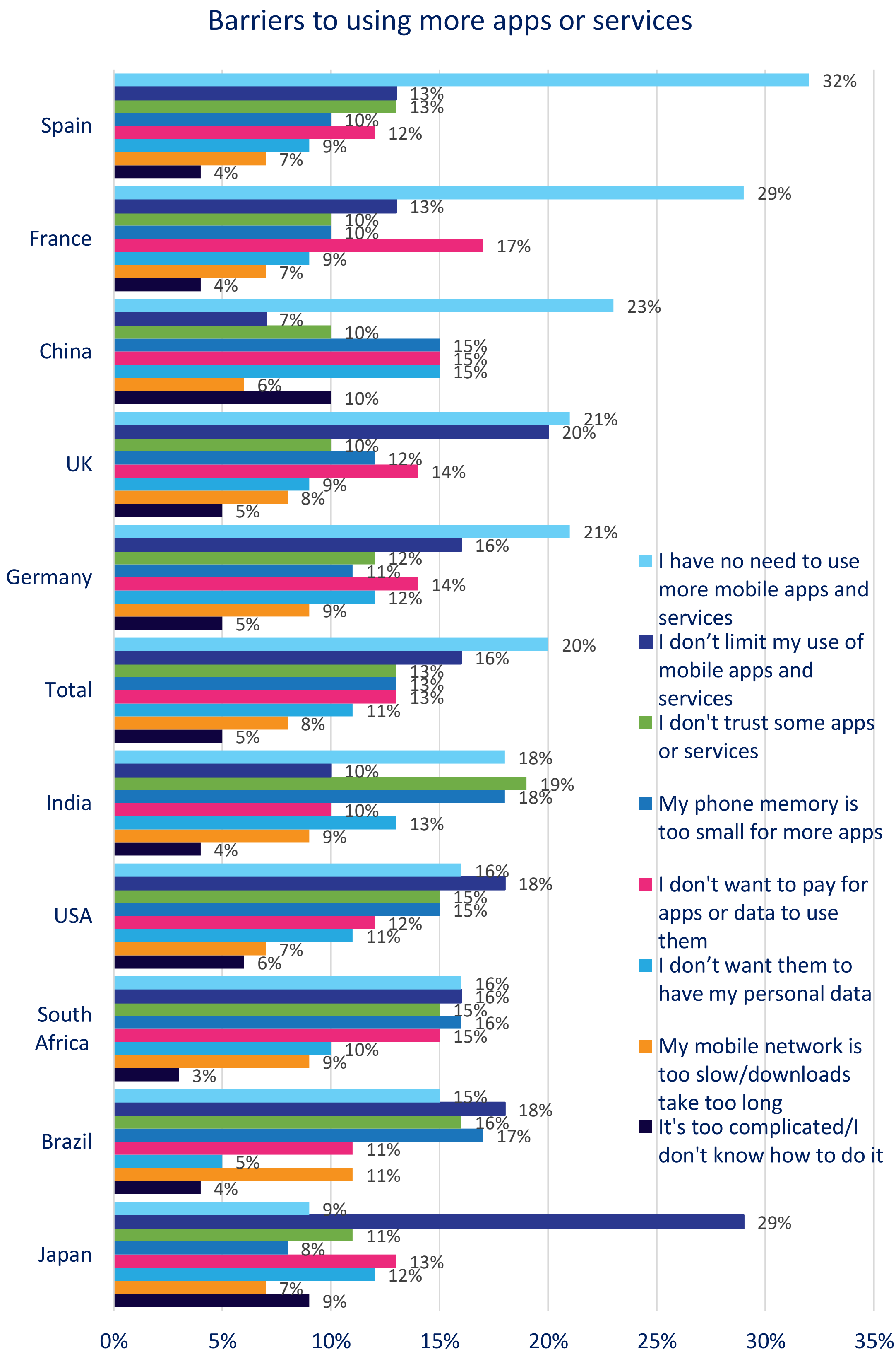
Similarly, we can see that in Germany, the prevalence of watching video content at 54% is quite low compared to other activities.

'SOCIAL' APPS ARE USED EVERY DAY



App usage fall into 2 groups – those social apps that tend to be used daily, and those that are just used as needed or are transactional.

COMPELLING NEW APPS AND SERVICES WILL UNLOCK HIGHER USAGE



The biggest barrier to increased usage is a lack of need.

Growth will therefore be driven by apps and services that are innovative and compelling.

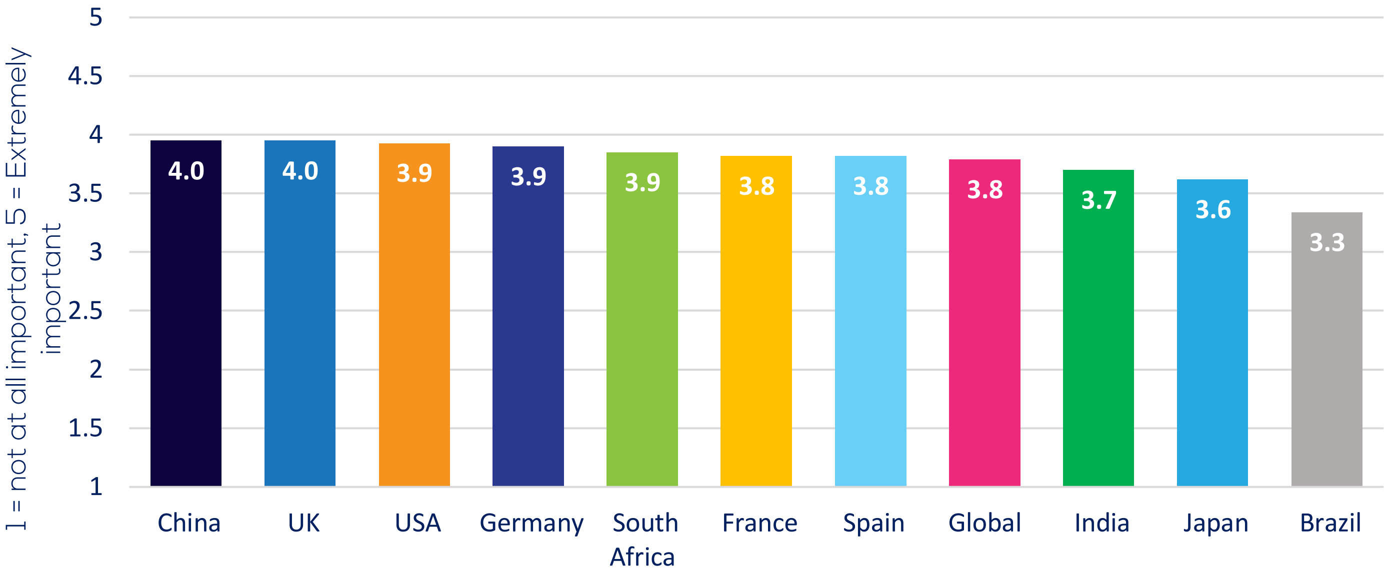
There are also some persistent barriers related to trust, as well as some resistance to paying for services (or for the necessary data).

However we can also see that activity or app complexity is not a notable barrier. Overall only 5% of users say activities or apps are too complicated.

Only 16% of users overall place no limits on their app usage so are easily open to higher usage. This figure rises to 29% in Japan but is only 7% in China.

THE EXPERIENCE OF EASE OF USE IS NOT A BARRIER

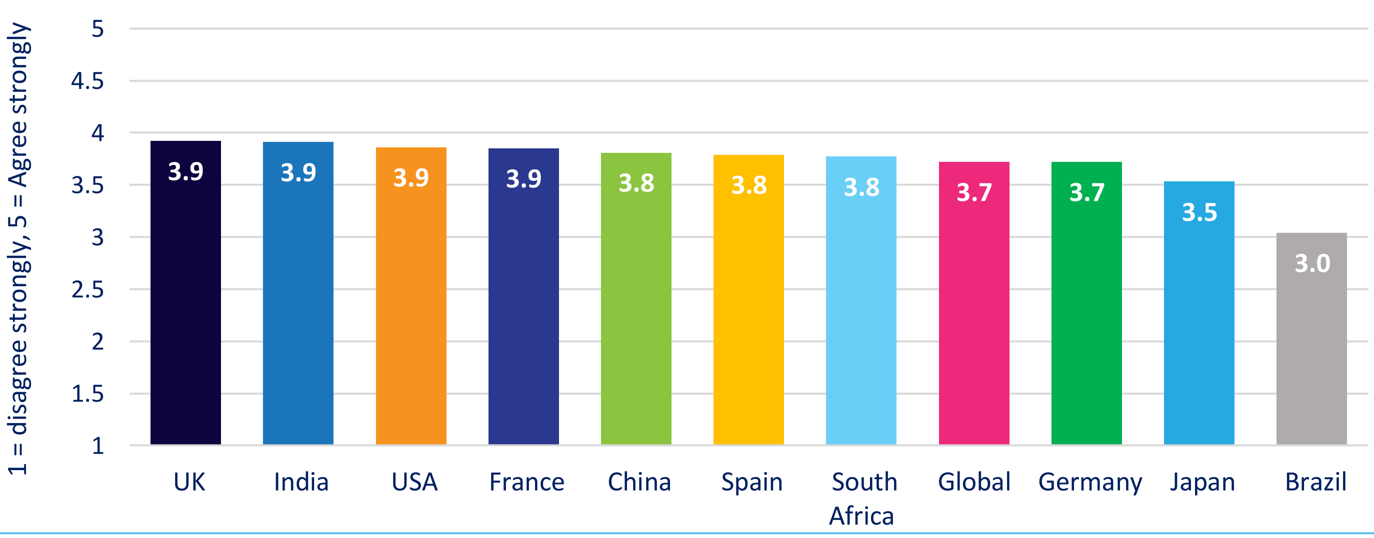
Importance that Mobile apps and services that are convenient, easy to use



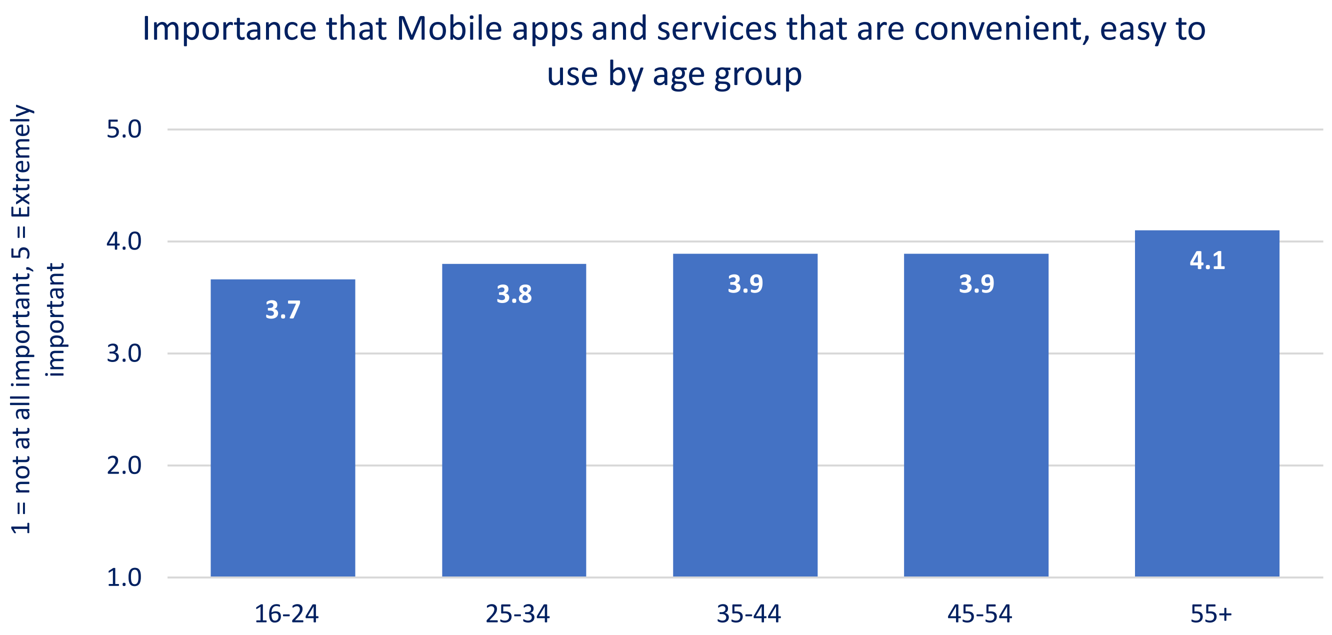
There is broad consensus that mobile apps and services must be easy to use. In reality users do find that apps and services are quite easy to use, though there is still clear room to improve. This is more noted in Brazil where there seems to be greater need for improvement although ease of use is felt a little less important.

We can note that, for example, users in India are a little less concerned about ease of use, yet their experience of ease of use is good.

Agreement that Mobile apps and services are actually convenient and easy to use

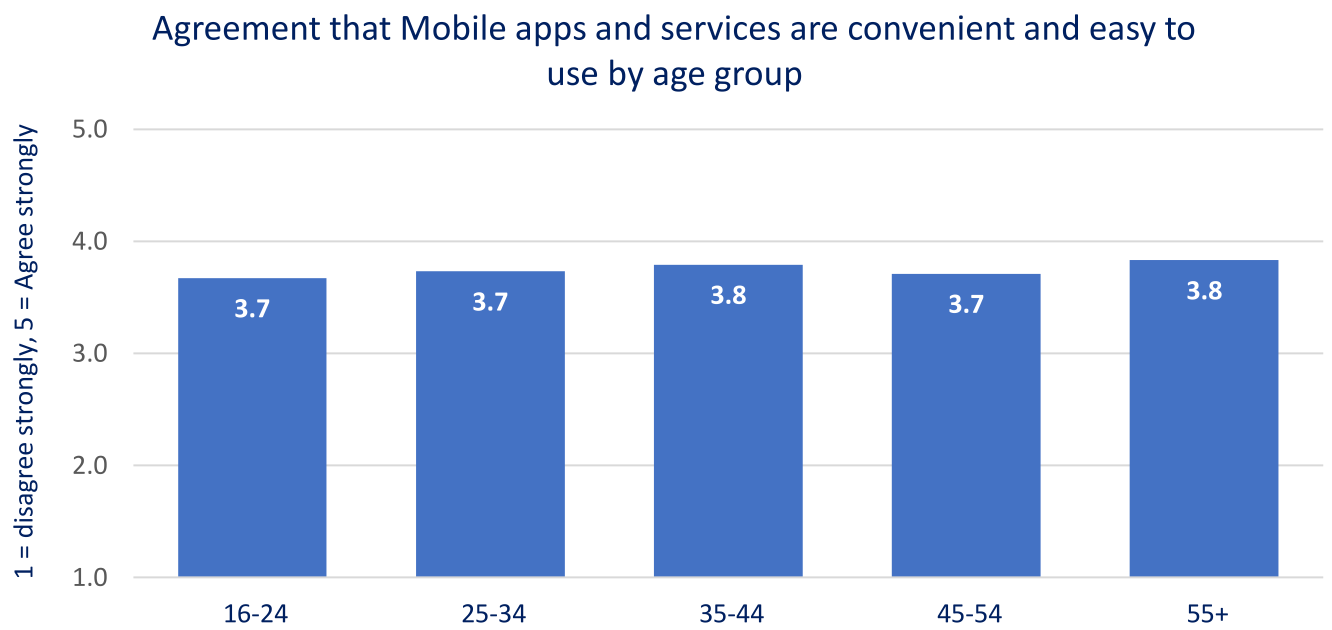


OLDER USERS FEEL A GREATER NEED FOR EASY SERVICES



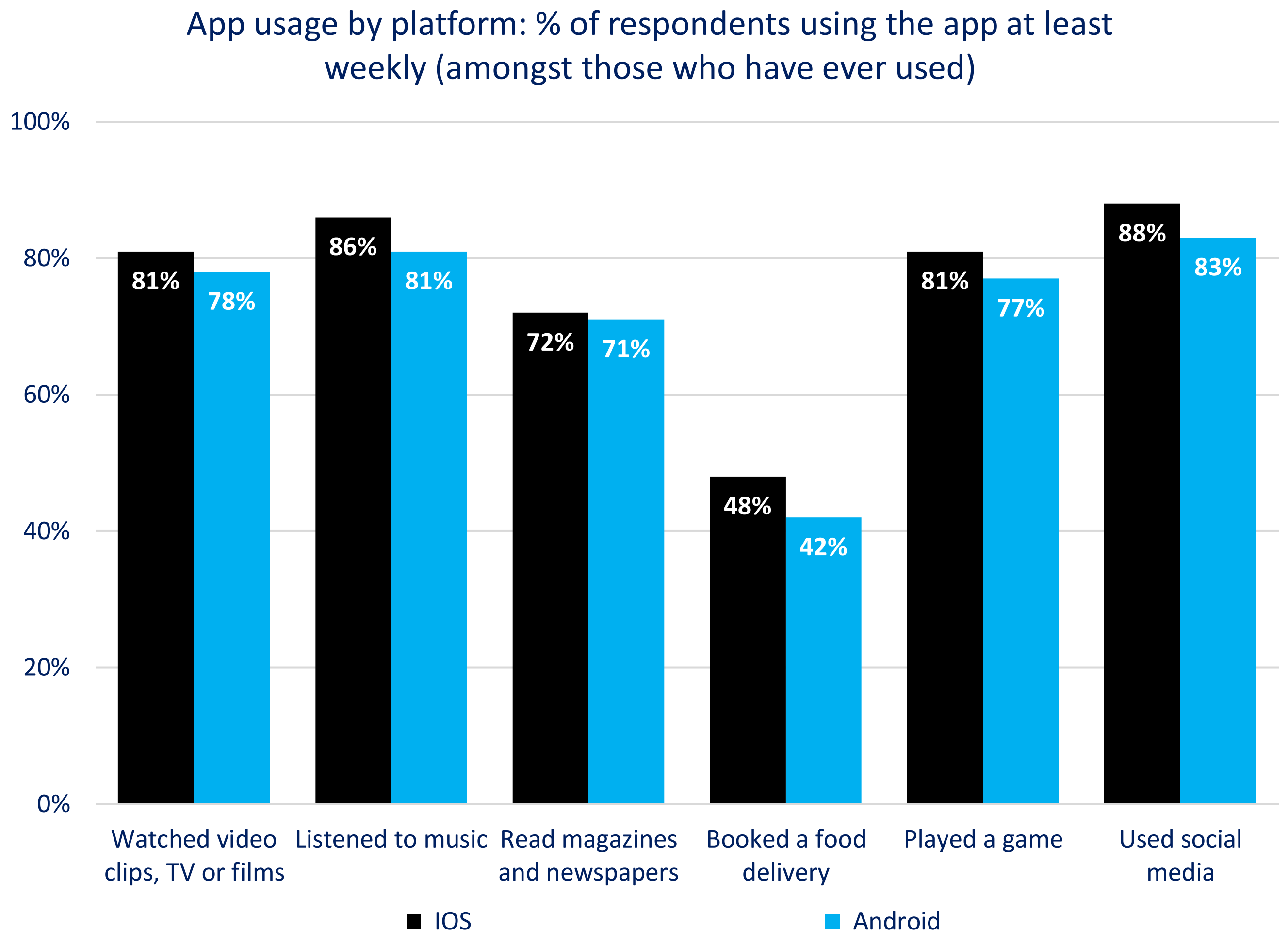
The importance of convenience and ease of use rises with age group, with the oldest age group scoring 4.1 vs the global average of 3.8.

The actual experience is mostly consistent across age groups suggesting that while complexity is not a major barrier for older users, simple convenience and ease of use may be.



APP USAGE BY PLATFORM

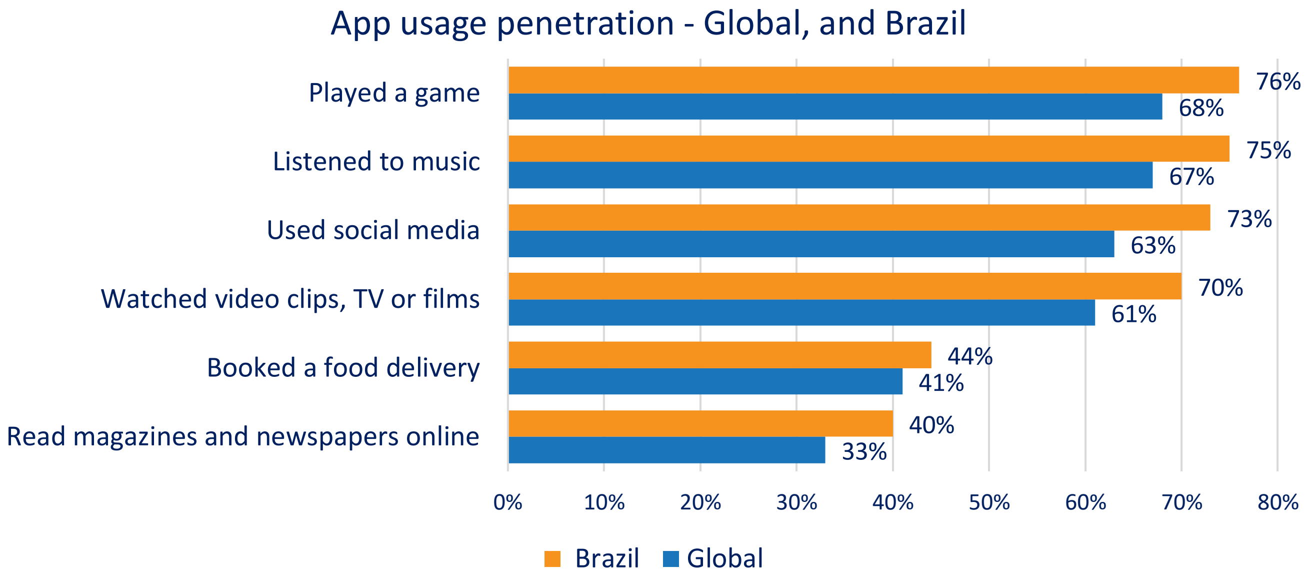
If we look at frequency of app usage by mobile platform (all those who have done the activity at least once per week), we can see that generally those users on IOS tend to be a little more active than those on Android.



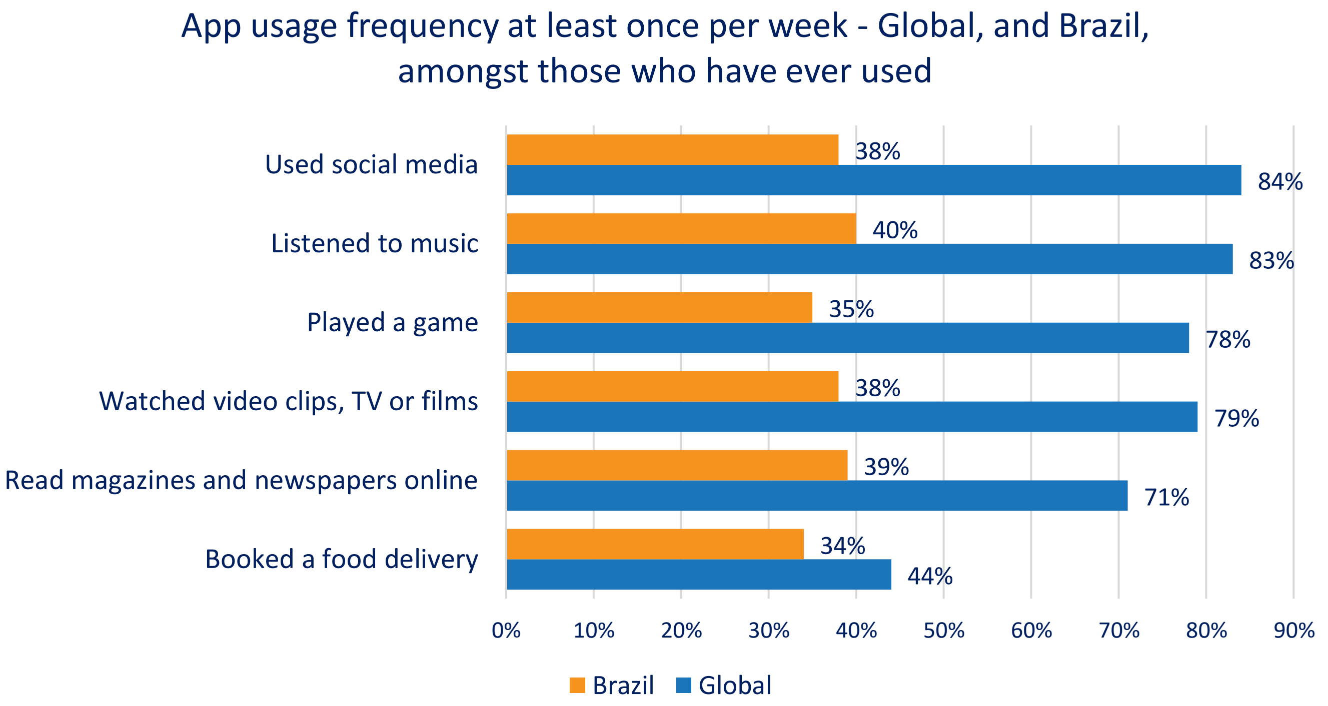
The difference in usage frequency is most pronounced in booking food delivery, but least pronounced for reading newspapers and magazines.

SMARTPHONE ACTIVITY - BRAZIL

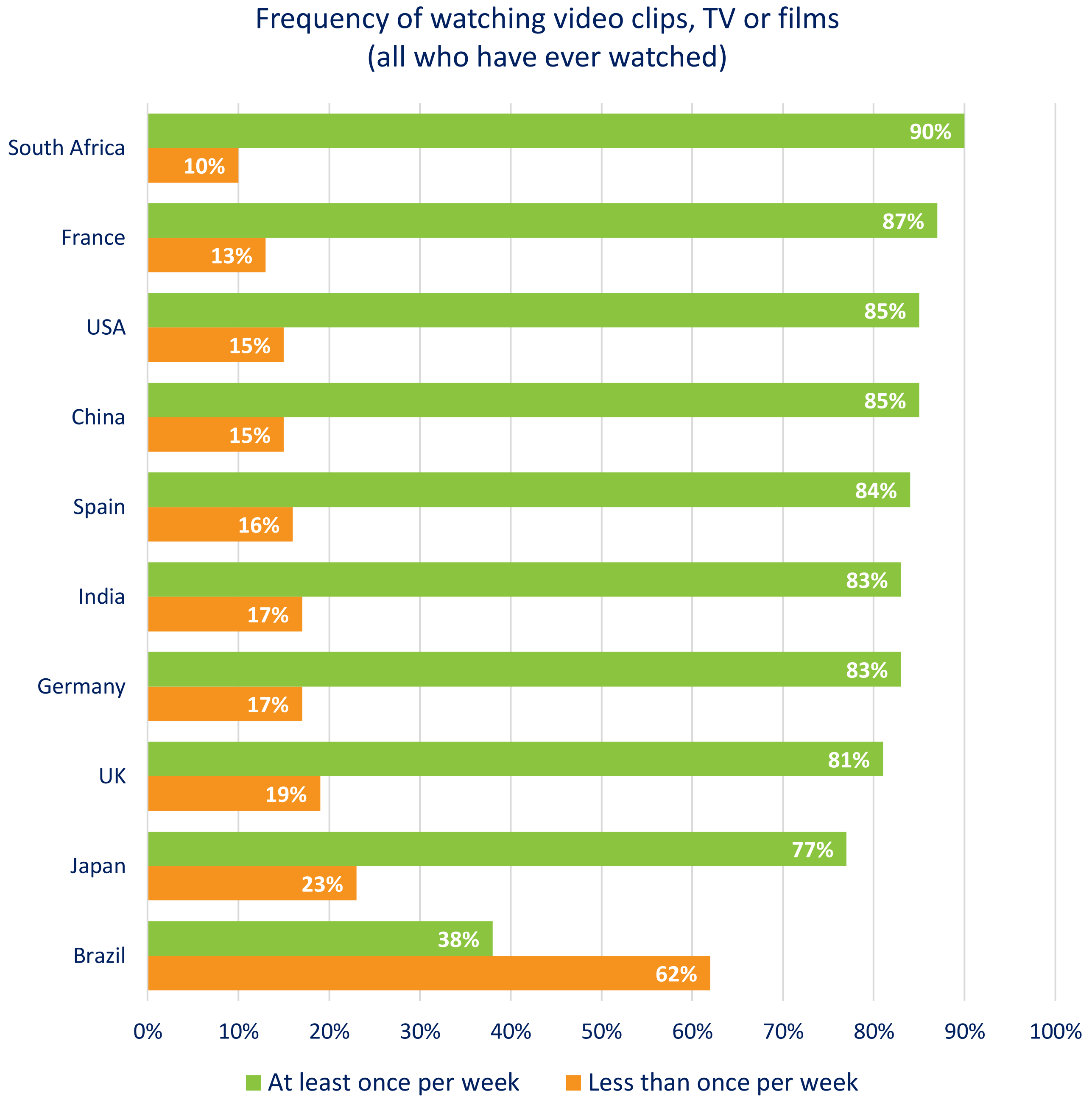
Analysed by country, the % of users who ever undertake any of 6 core activities is reasonably consistent. We can see here that in terms of the % of smartphone users ever taking part in one of these activities, Brazil is actually ahead of the global average.



But if we analyse by how often these users actually take part in an activity, frequency of use is far lower in Brazil than the global average. Further checking within the market suggests this is due to local data costs that inhibit more frequent usage. Users in Brazil tend to be very careful with their data usage!



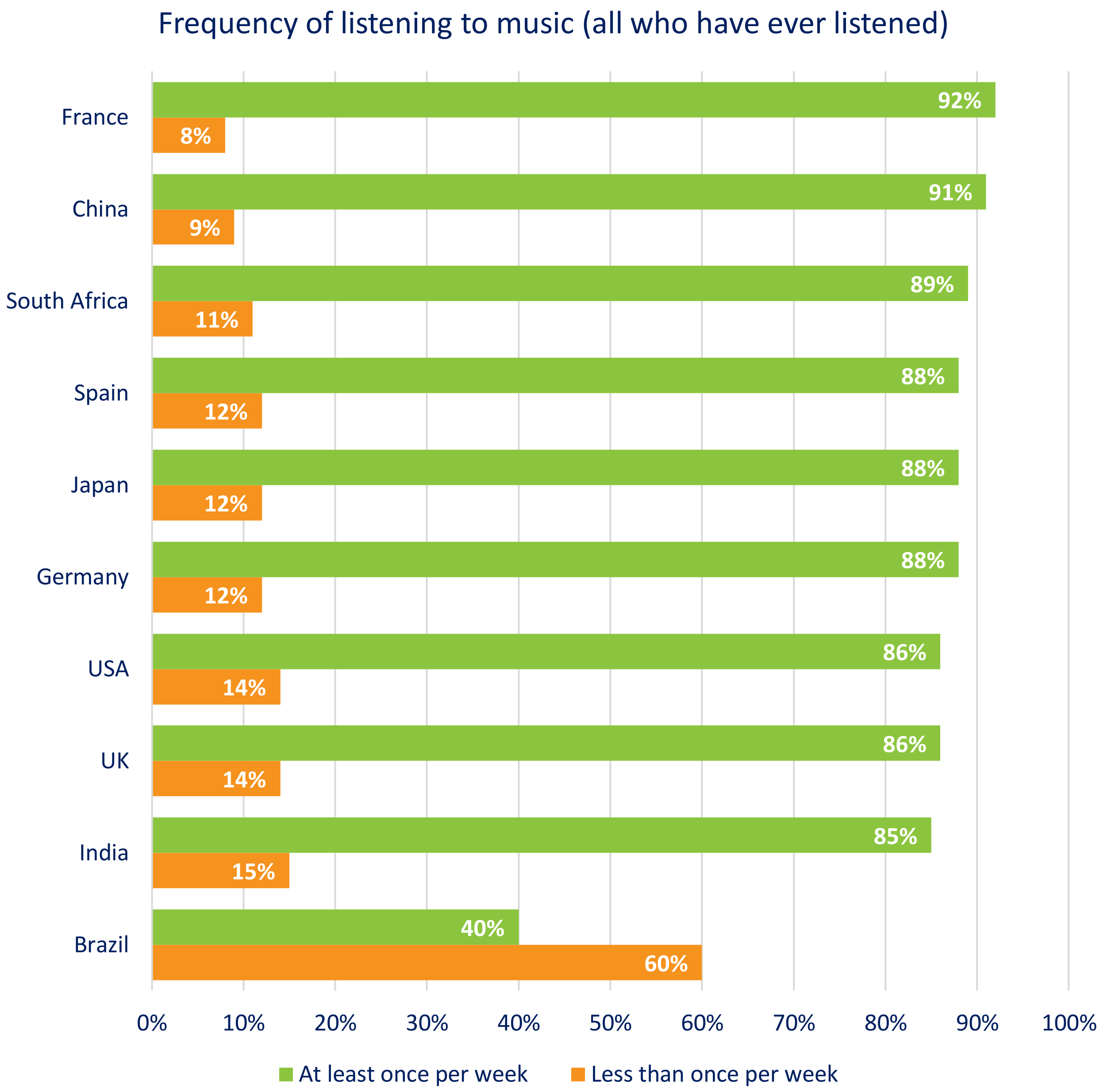
VIDEO IS WATCHED MOST OFTEN IN SOUTH AFRICA



Watching video content is the 4th most frequent global app activity, at 61% of all users. By far the majority of those who watch video content do so at least once every week, in every country except Brazil.

Watching video content is more popular in Brazil than most other countries – but those that do watch video watch it much less frequently than users in other countries. In Brazil, only 38% of those who listen to music do so more than once per week, compared to 90% in South Africa.

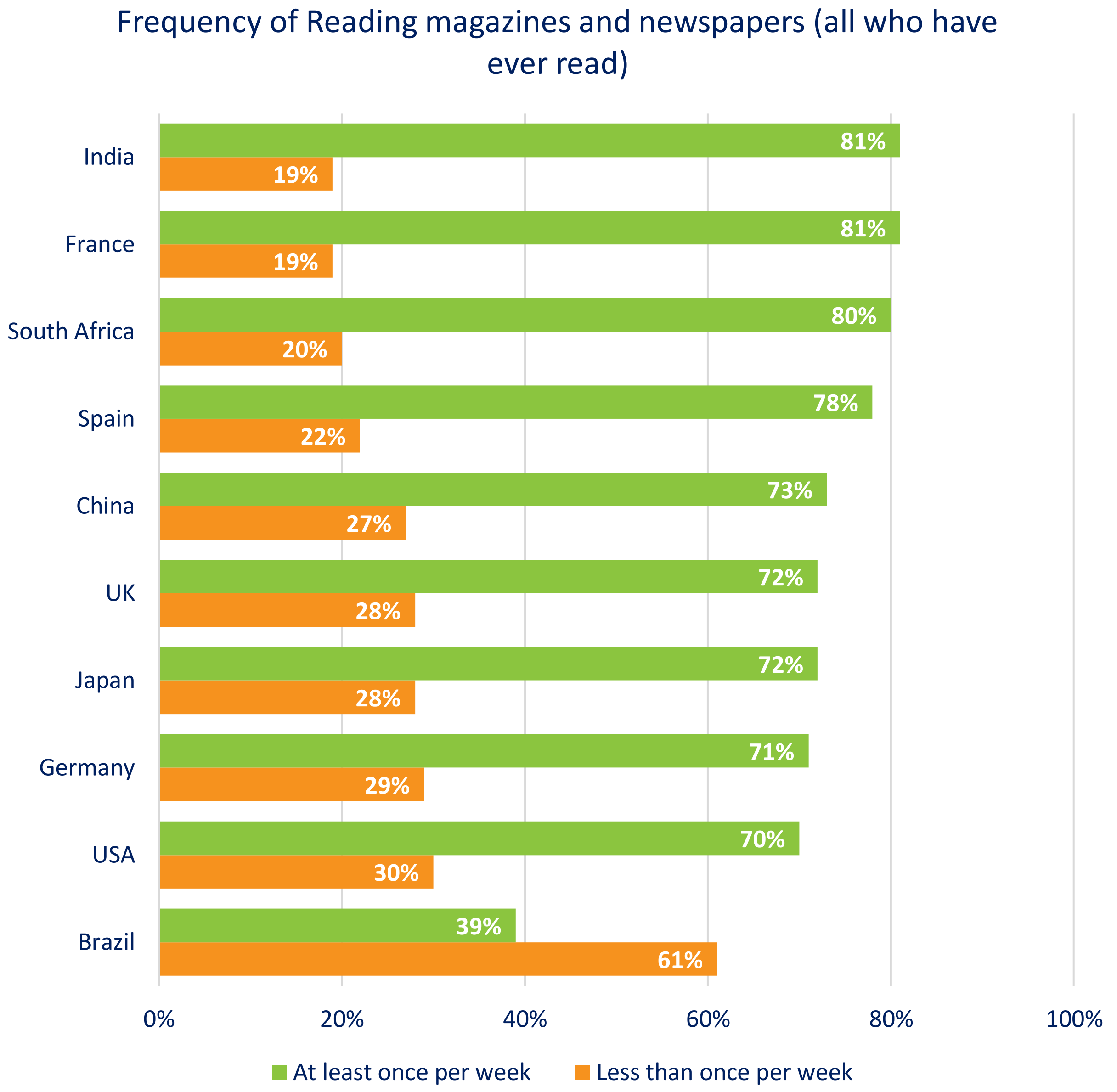
FRANCE AND CHINA LEAD IN LISTENING TO MUSIC



Listening to music is the 2nd most frequent global app activity, at 67% of all users. By far the majority of those who listen to music do so at least once every week, in every country except Brazil.

At 75% of users, listening to music is more popular in Brazil than all other countries surveyed – but those that do listen do it much less frequently than users in other countries. In Brazil, only 40% of those who listen to music do so more than once per week, compared to 92% in France

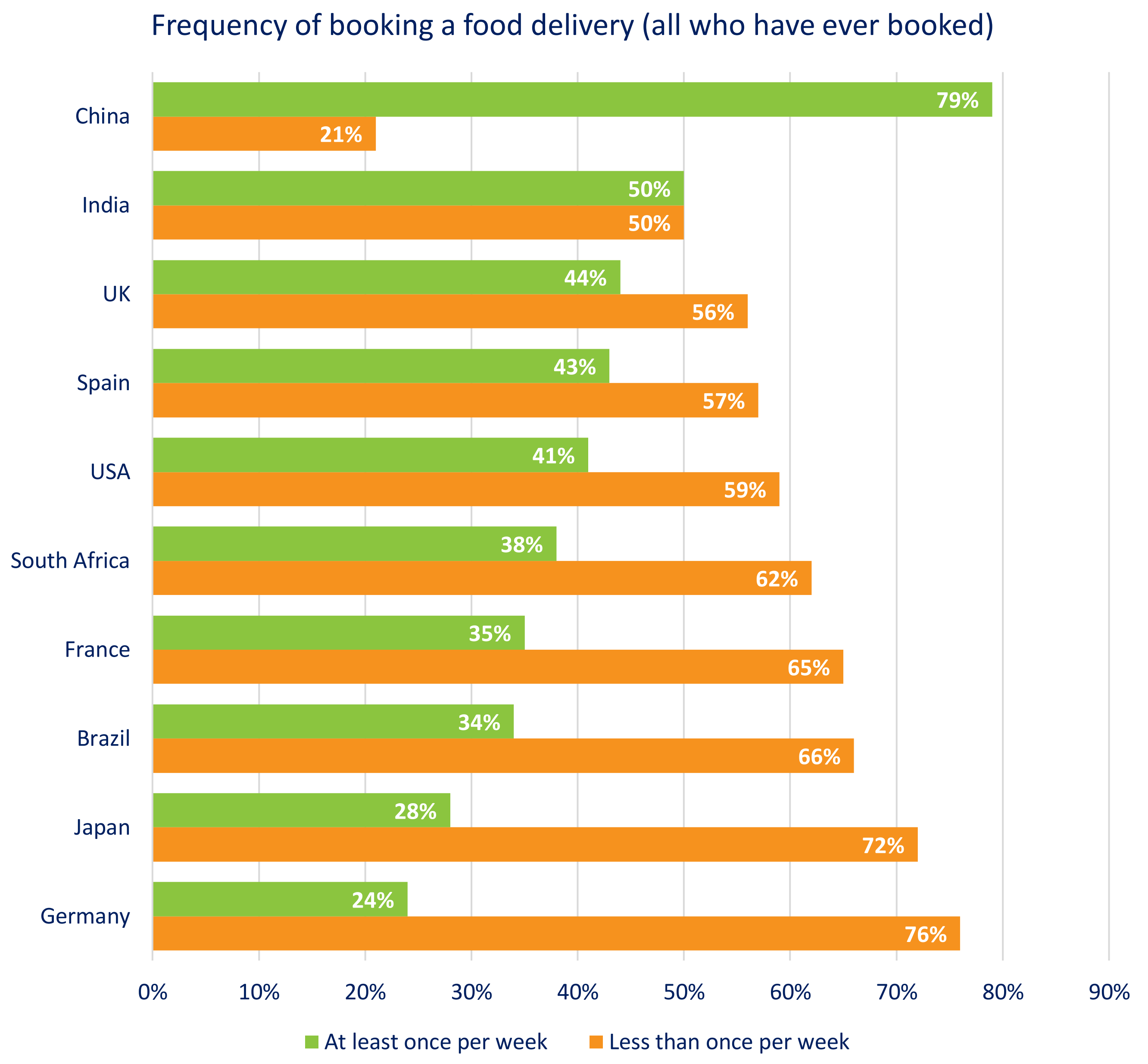
INDIA AND FRANCE EMERGE AS AVID READERS



Globally only 33% of all users read newspapers or magazines on their devices. For those that do read, this is not quite such a common activity as watching video or listening to music, though the majority of those who read do so at least once every week, in every country except Brazil.

At 40% of users, reading newspapers and magazines apps is more popular in Brazil than all other countries surveyed – but those that do read do so much less frequently than users in other countries. In Brazil, only 39% of those who read do so more than once per week, compared to 81% in India.

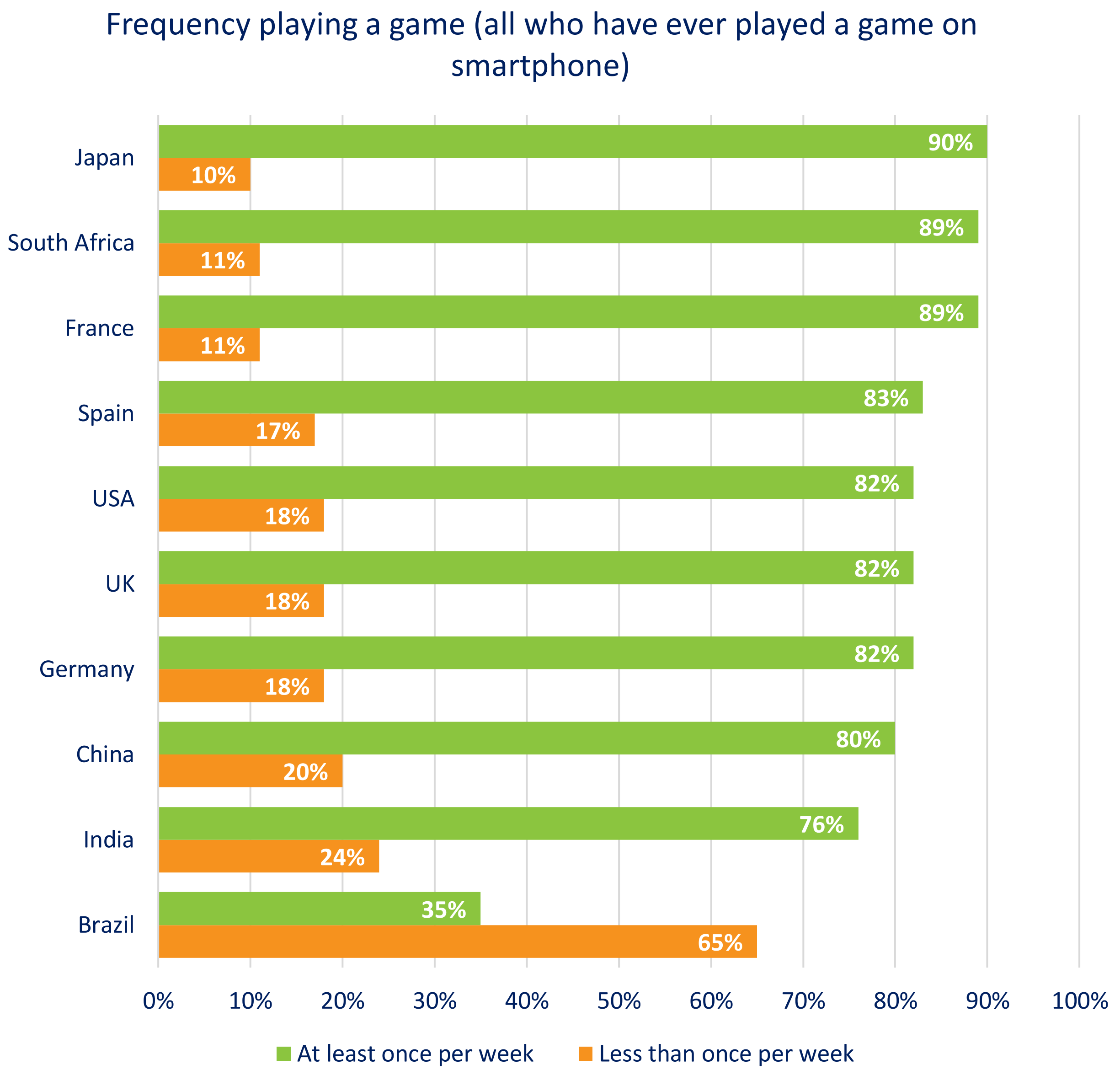
BOOKING A FOOD DELIVERY IS BECOMING MAINSTREAM IN CHINA



Booking a food delivery is an emerging app except in China and is constrained by availability of such a service. Only 41% of users worldwide have ever booked a food delivery via their smartphone although we note that this rises to 60% in China.

China also leads in frequency of use where of those who have ever booked a food delivery, some 79% do so at least every week.

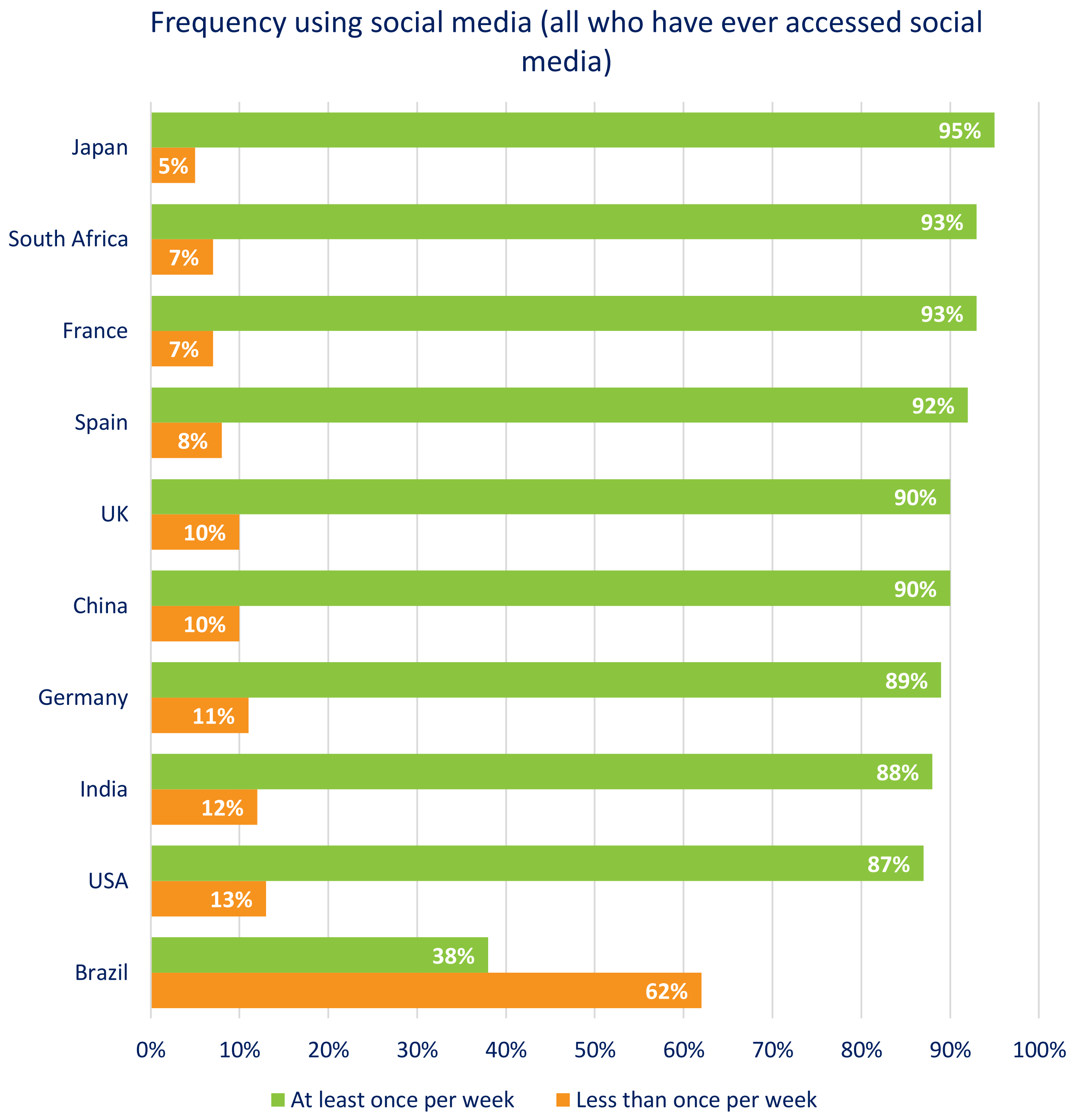
JAPAN, SOUTH AFRICA AND FRANCE ARE GAMERS



Playing games apps is the leading activity globally, where 68% of users have ever played a game app on their smartphone. Of those that do play, users in Japan lead the way where 90% play a game at least once a week.

Frequency of gaming in Brazil is again low.

JAPAN LEADS THE WAY WITH SOCIAL MEDIA



Social media is one of the most popular apps with 63% of all users globally using social media at some point.

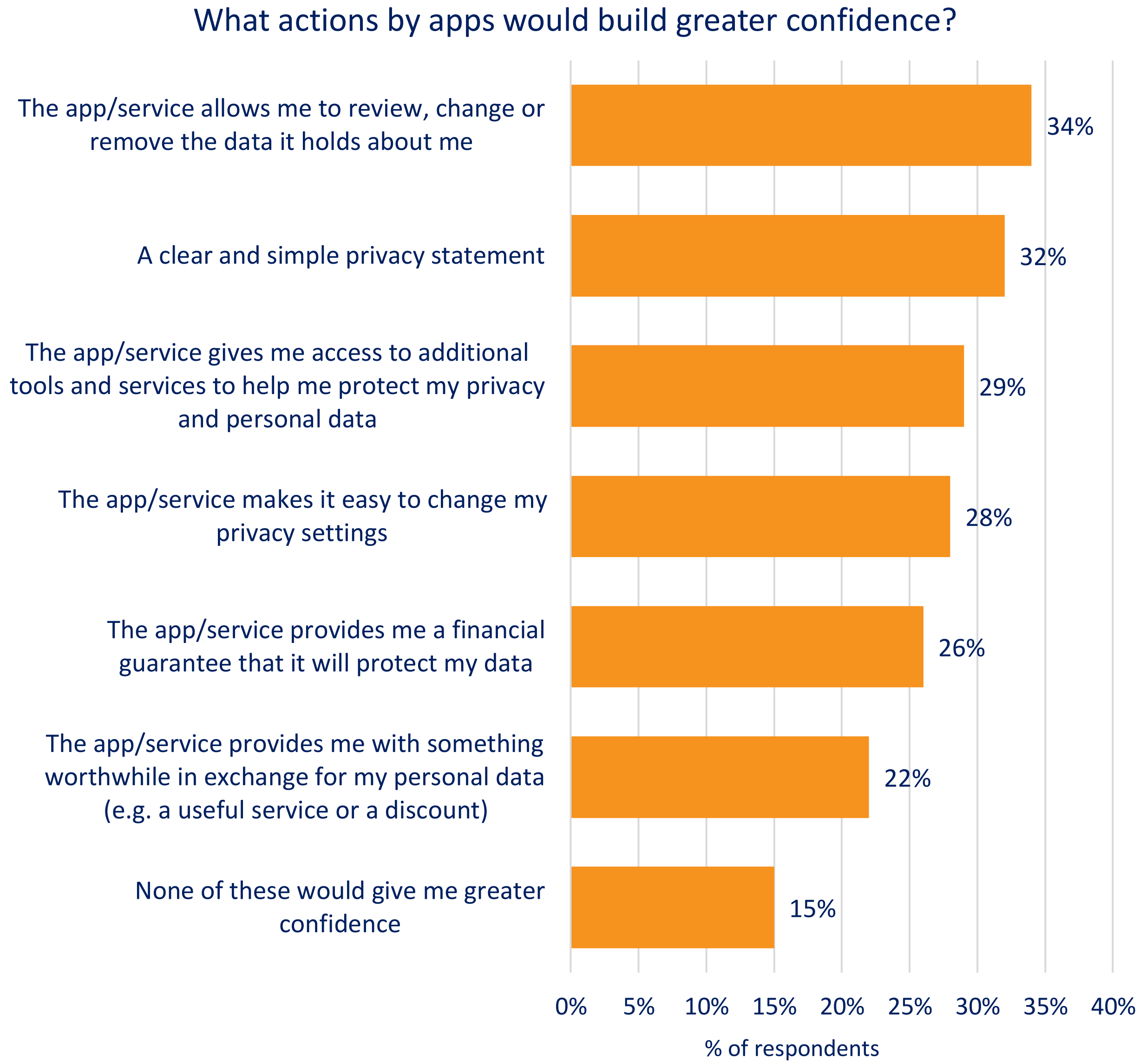
Amongst those who do use social media, Japan leads the way with 95% of social media users being active on platforms at least every week.

CONFIDENCE IN THE HANDLING OF PERSONAL DATA IS DRIVEN BY APPS LETTING USERS HAVE CONTROL

Globally, apps can drive increasing confidence that they are handling personal data safely by giving users control over reviewing, changing or deleting the personal data that the app holds.

- 34% of global users felt this would build their confidence in the app.

We can also see that at the other end of the scale, 15% of global users felt that none of these actions would build confidence in apps. However, there are also clear national differences driven by specific user attitudes.

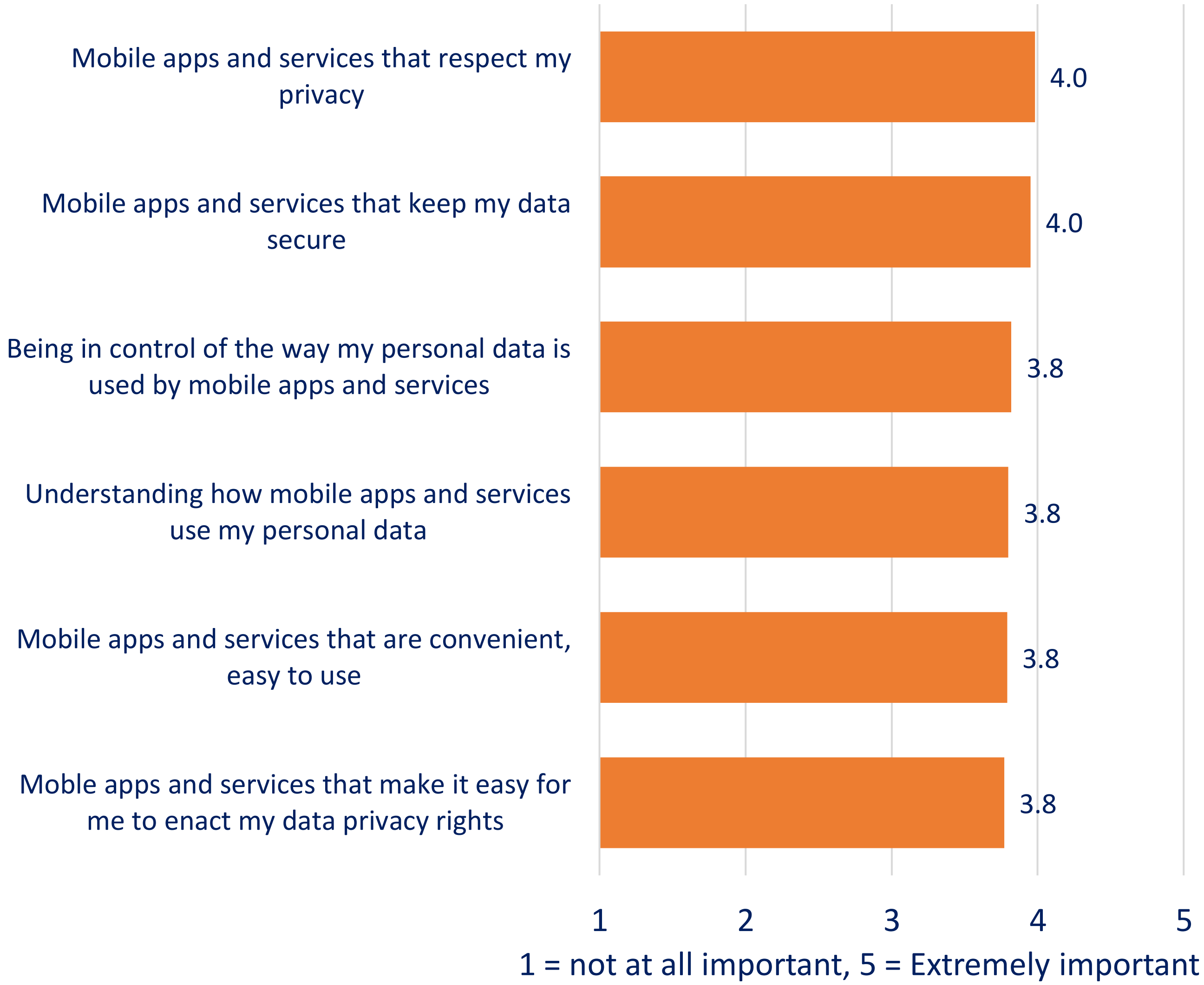


APPS CAN BUILD TRUST WITH USERS

Apps can help build trust with users. At a global level, all six attributes have a similar positive impact on trust. The most effective are:

- Respecting user privacy.
- Keeping personal data secure.

Building trust: What is important to users about apps and services?



HOW ARE APPS USED?

ROOM FOR GROWTH IN APP USAGE

5 key points on app usage

1. **There are significant growth opportunities in app usage**

   There is an opportunity for growth in all app usage, even gaming and social media

2. **South Africa and Brazil lead the way with app usage**

   South Africa and Brazil are generally the leading countries by activity. Usage in some countries such as Japan is shaped by local norms

3. **New and emerging activities vary significantly by country**

   Newer app usage, such as taxi ride and food delivery booking is driven by specific service availability

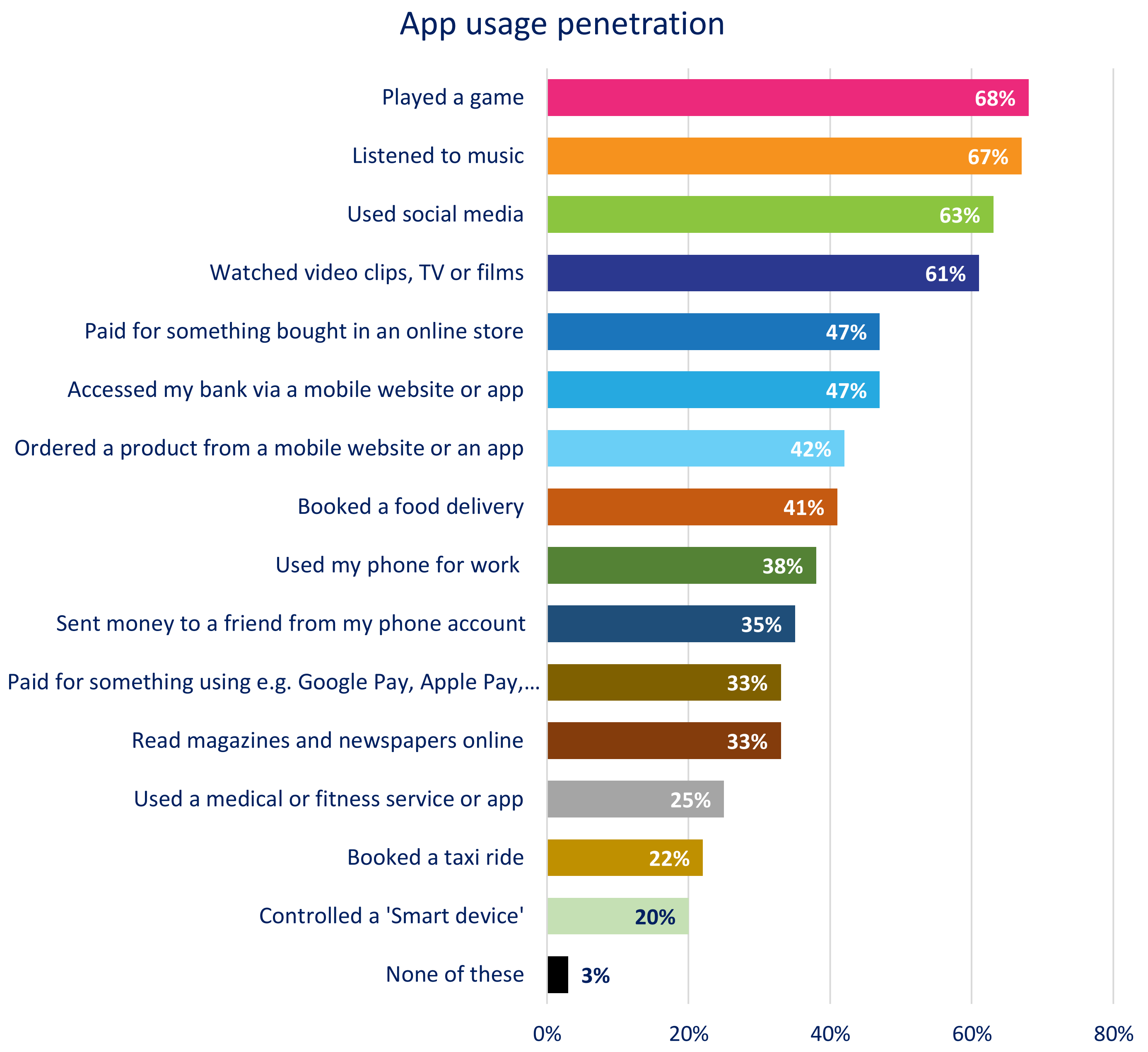
4. **Female users lead the way**

   For nearly all activities, penetration is greater among female and male users, especially for social media and payments

5. **App activity can be a daily habit, or just transactional**

   Frequency of activity can be split into those that are social daily habits such as gaming, social media, and watching video content, and those uses that are transactional such as booking a taxi.

STILL SIGNIFICANT GROWTH OPPORTUNITY IN APP USAGE

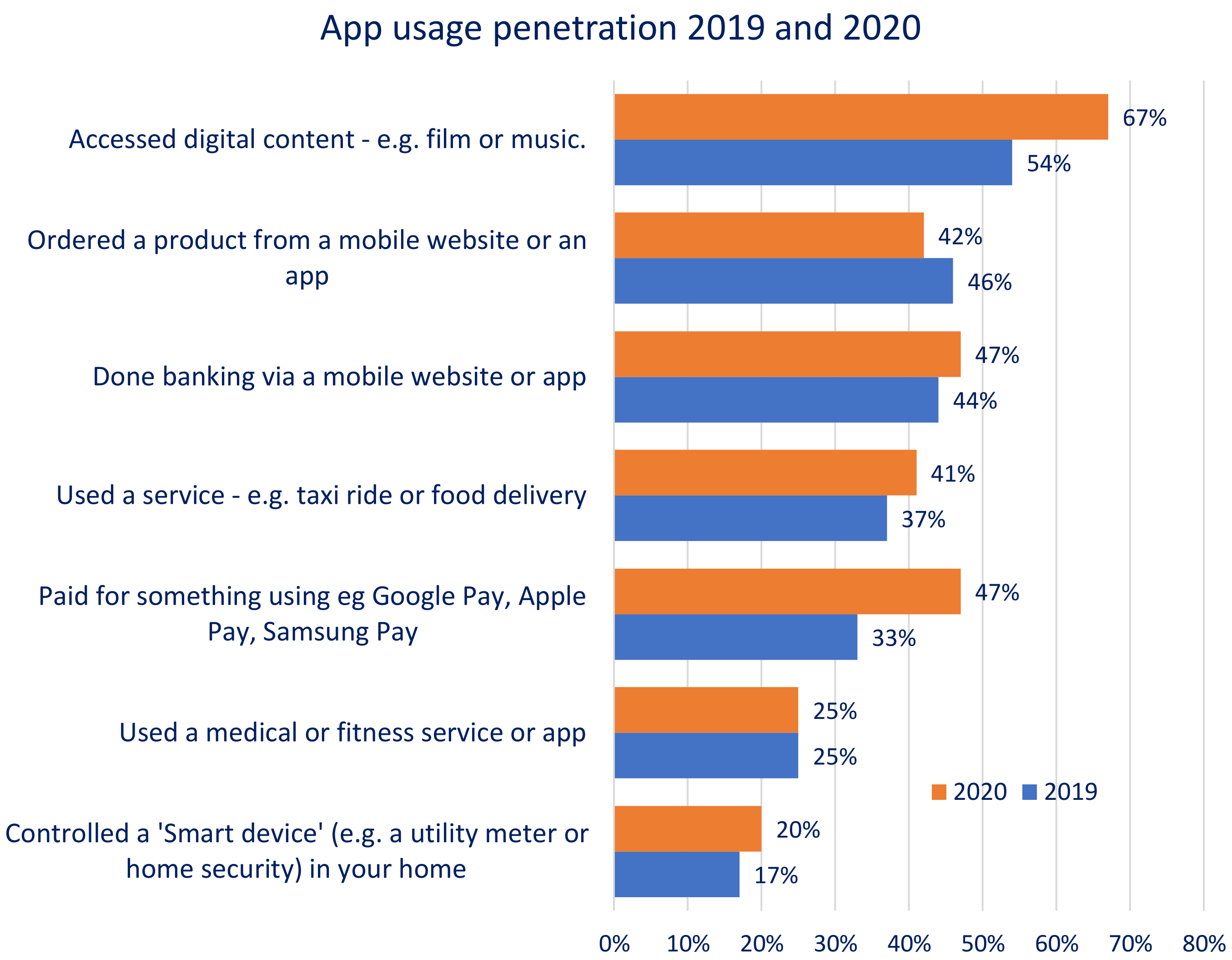


Globally around two-thirds of smartphone users have played a game, listened to music, used social media, or watched video content on their smartphone. These are the leading uses by some margin though there is still plenty of headroom for growth.

Other activities have a more significant growth opportunity and we can see emerging uses such as using fitness services and booking taxi rides starting to have a presence.

It is worth pointing out that only 3% of global smartphone users have never used their phone for any of these activities – just using their smartphone as a phone.

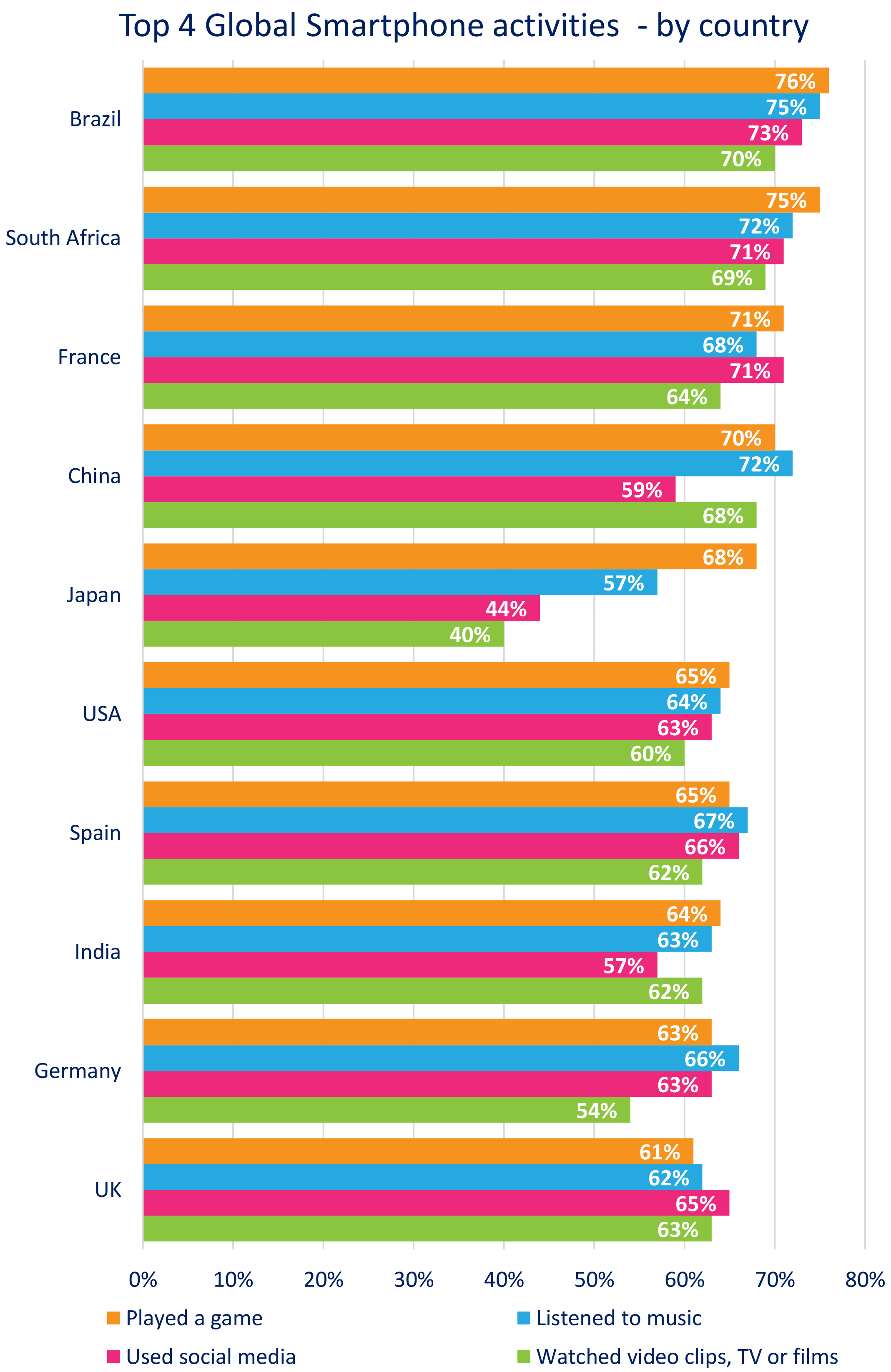
GROWTH IN APP USAGE SINCE 2019



Most app usage has grown since 2019, except for ordering products which may be a victim of a year when COVID has changed online behaviour in unexpected ways globally.

The biggest growth is in accessing digital content, and in mobile payments.

SOUTH AFRICA AND BRAZIL LEAD IN APP USAGE



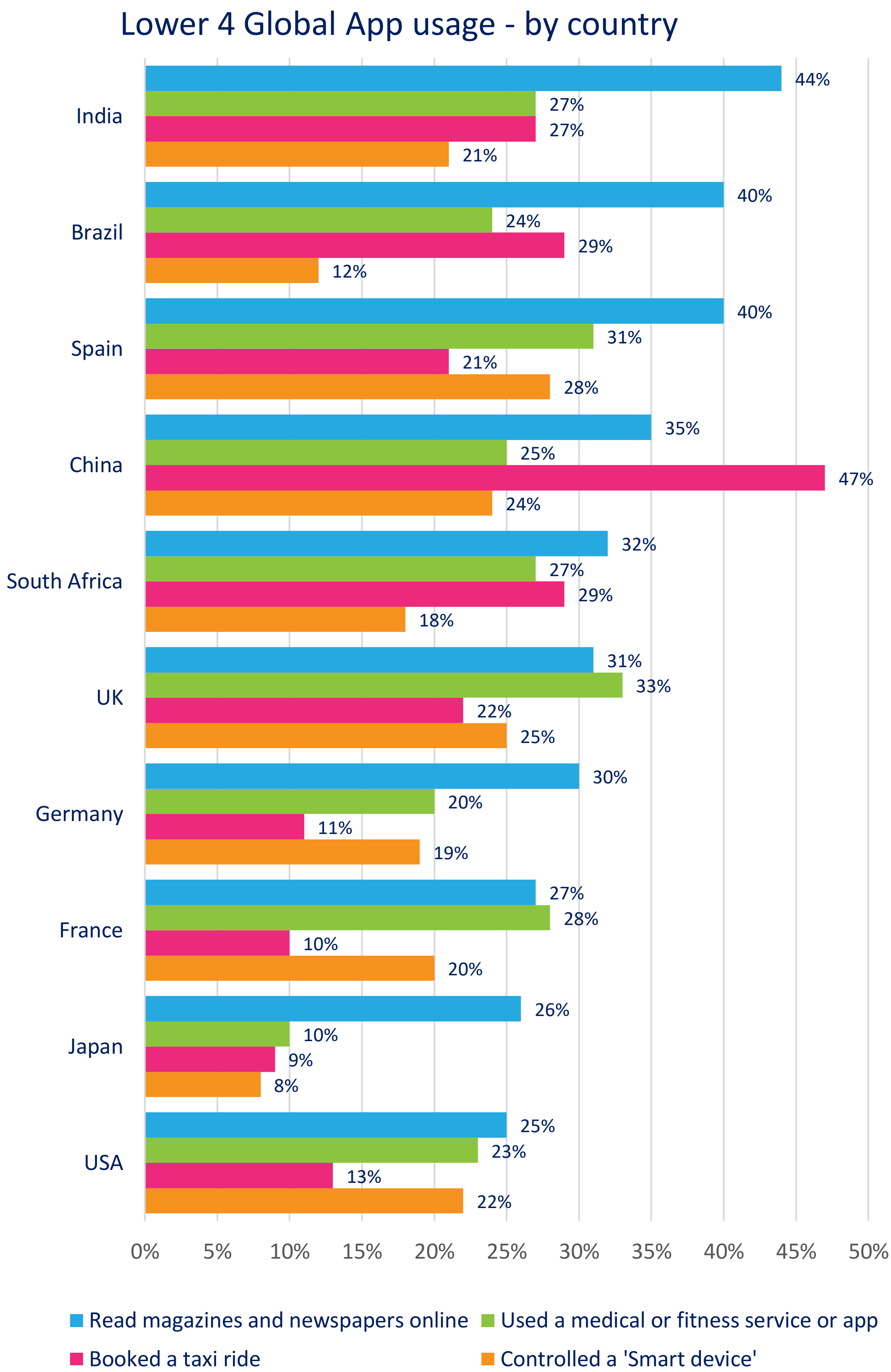
Playing games is the most popular app activity around the world, led by Brazil and South Africa.

After games though, users in Japan are far less likely to have listened to music, watched video or used social media. Watching video in Japan seems especially low at 40%.

Social media activity by app in China is also low at 59%, considering the levels for gaming and listening to music.

Similarly, we can see that in Germany, the prevalence of watching video content at 54% is quite low compared to other activities.

NEW APPS OFFER GREATEST OPPORTUNITIES



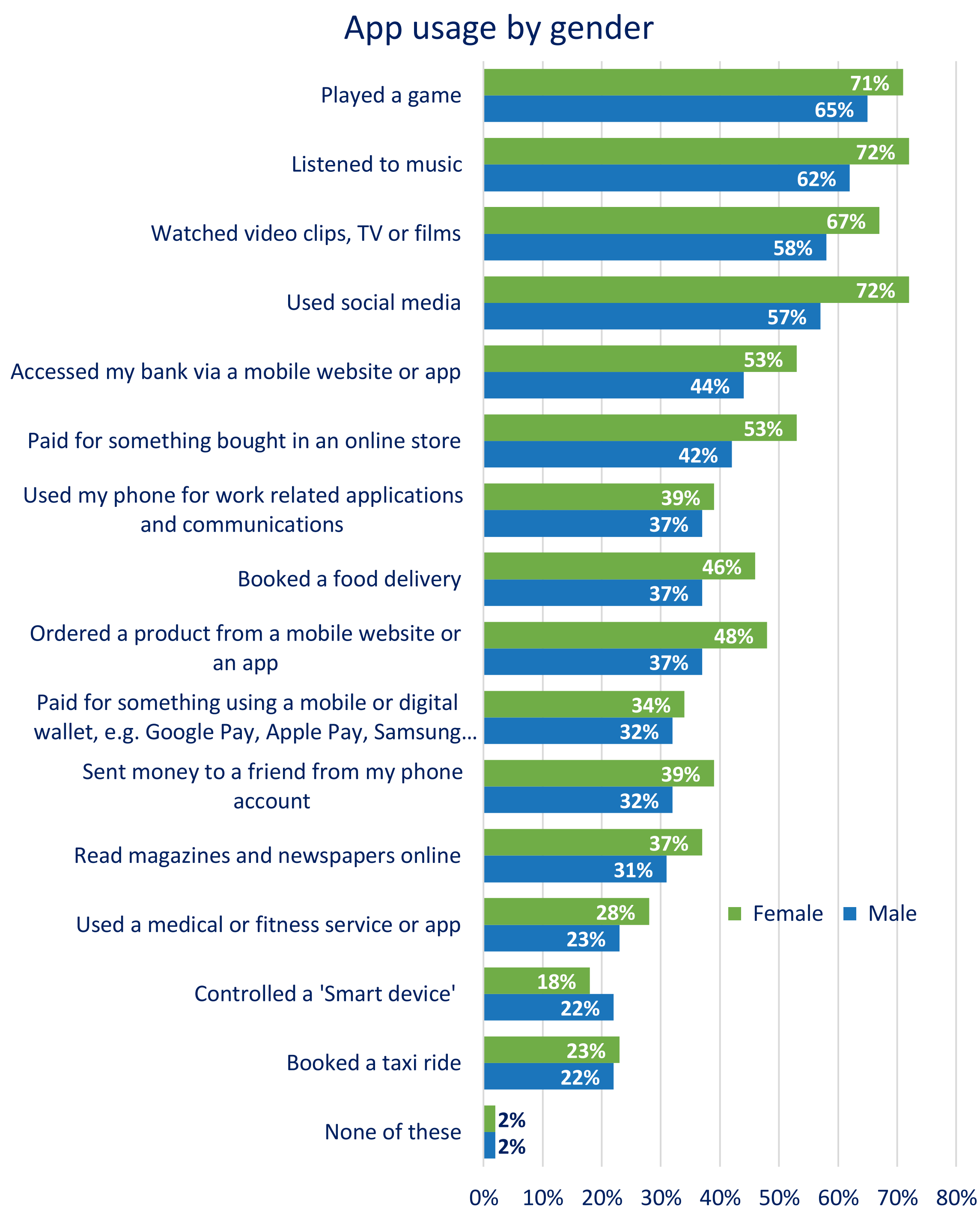
App usage with lower penetrations will be influenced by country norms as well as infrastructure availability.

But we can see a lot more variation between countries for these smartphone activities.

Reading newspapers and magazines has a surprisingly low global penetration at 33%. India has the highest country penetration at 44% but falls to just 25% in the USA.

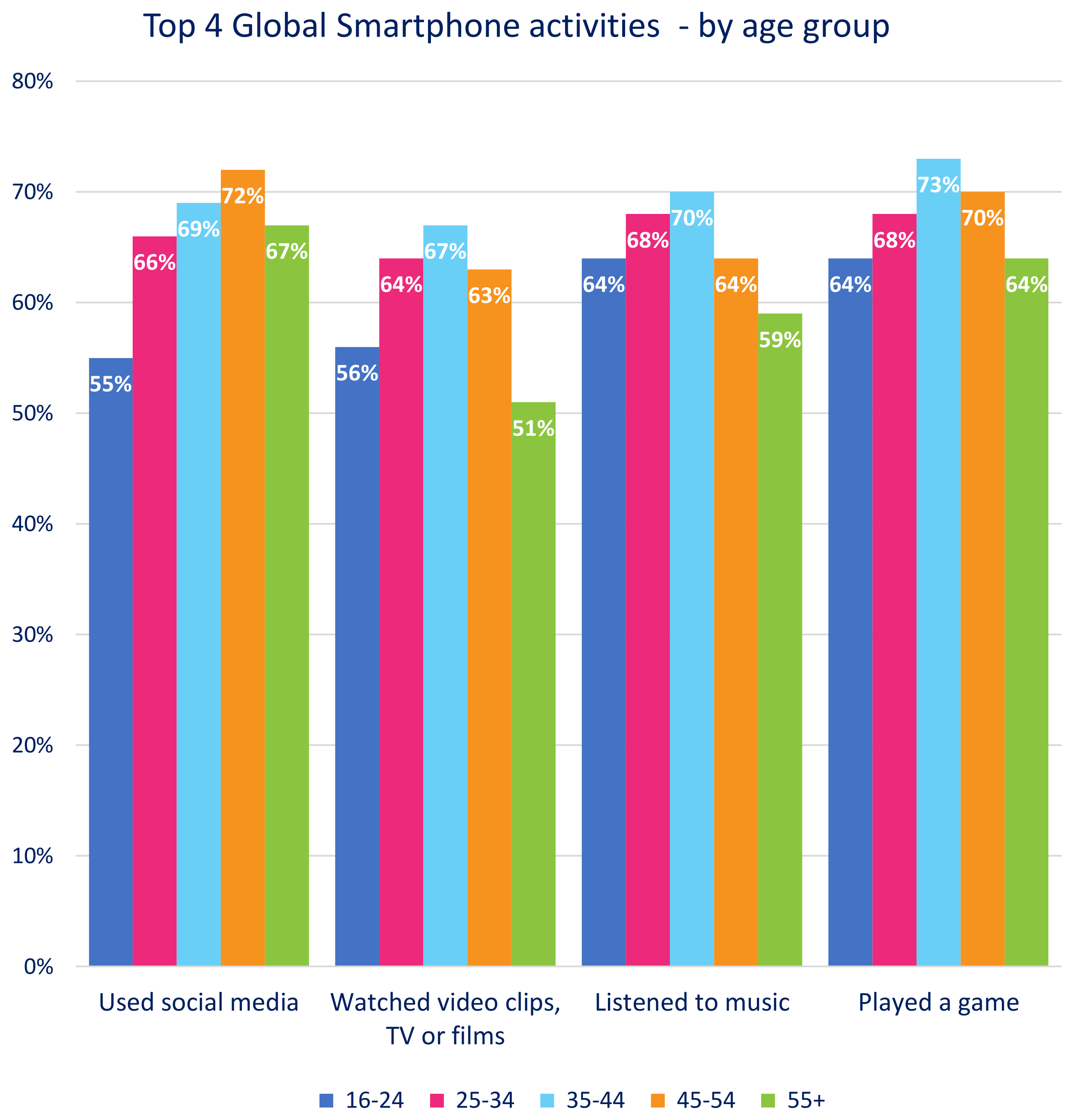
Booking a taxi has a notable high penetration in China at 47%.

FEMALE USERS LEAD THE WAY



We can clearly see that smartphone activity is more commonplace with female users for nearly all these activities, but especially for using social media and for purchase payment online.

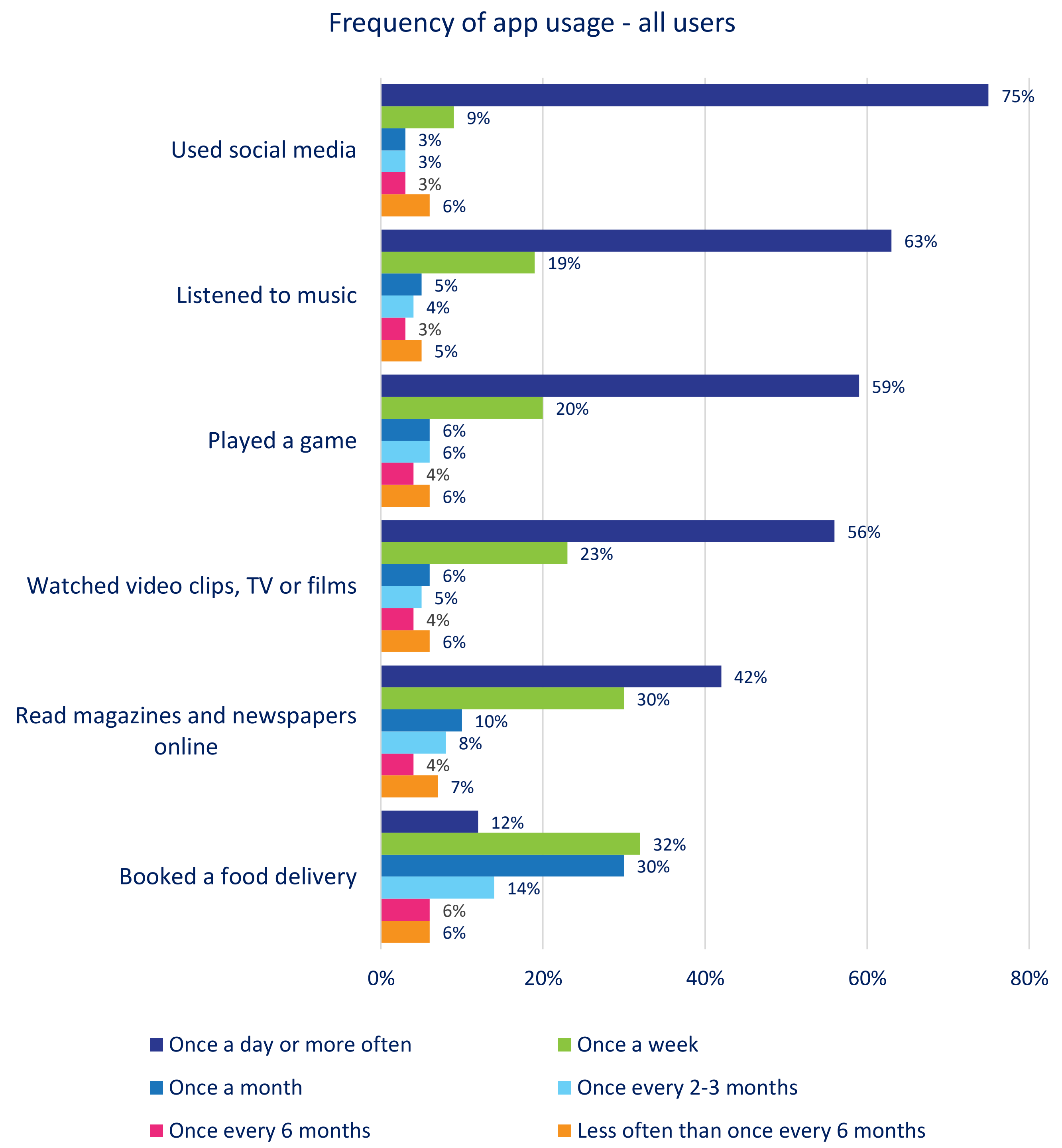
GROWTH OPPORTUNITIES WITH YOUNGER, AND OLDER USERS



We can see that the penetration for most app usage peaks in the mid age groups then falls back.

Surprisingly then, the youngest and older age groups offer the most growth opportunity in app usage generally.

'SOCIAL' APPS ARE USED EVERY DAY



App usage fall into 2 groups – those social apps that tend to be used daily, and those that are just used as needed or are transactional.

BARRIERS TO APP USAGE

INNOVATION IS THE KEY TO HIGHER APP USAGE

5 key points on app usage barriers

1

Compelling apps will drive higher usage

The biggest barrier to greater usage is a lack of perceived need. New apps therefore need to be innovative and compelling

2

Female users are more open to using more apps

Yet female users also consider they don't need more services

3

Older users need more reasons to increase app usage

More than other age groups, older users see no need to use more applications and services

4

Users in Brazil and Japan are least concerned about ease of use

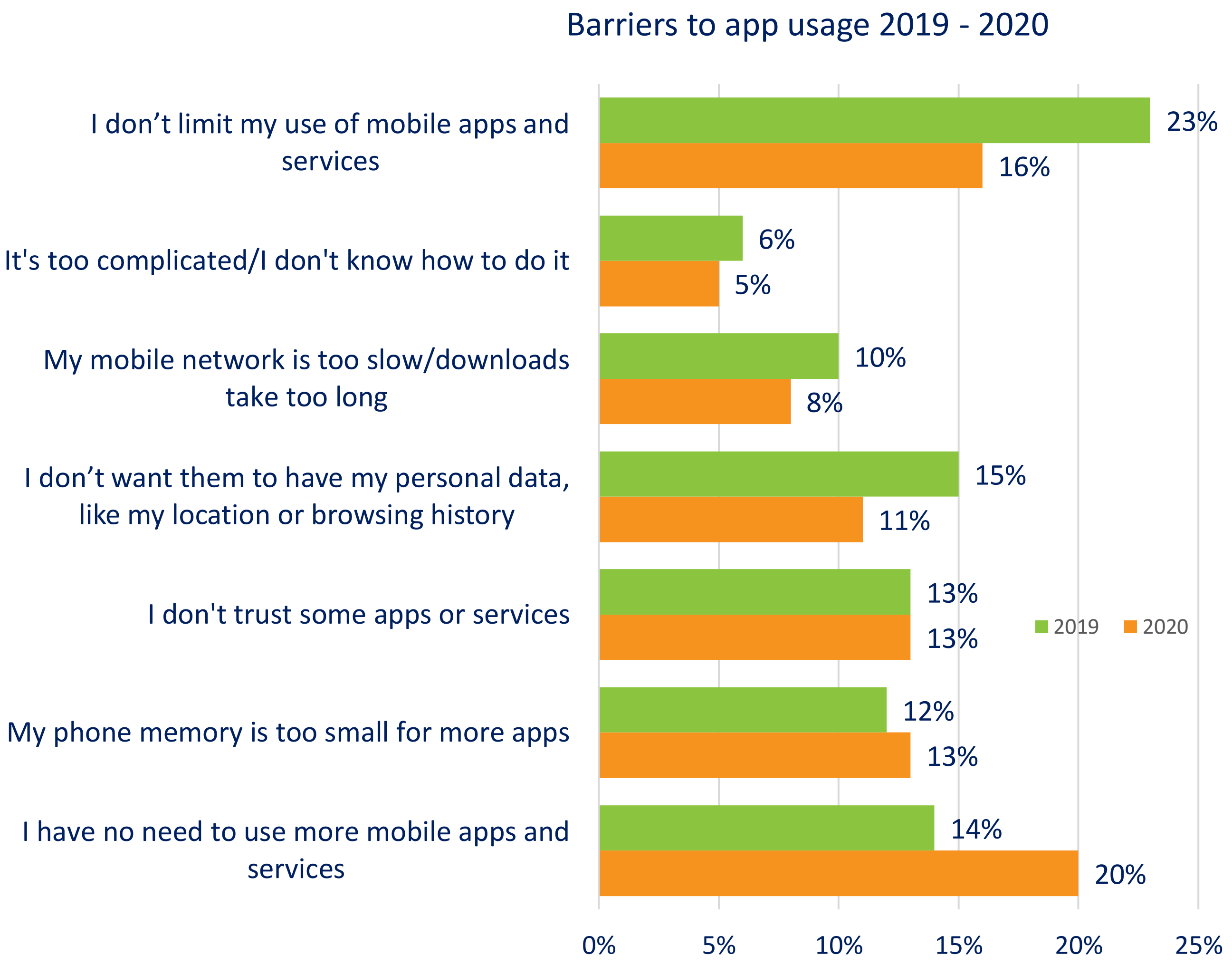
Importance of ease of use is consistent except in Brazil and Japan where it is lower. Yet the actual experience of ease of use is also a little lower in Brazil and Japan

5

Older users want easy to use applications

Older users want easy to use applications, but the actual experience of ease of use is consist across all age groups

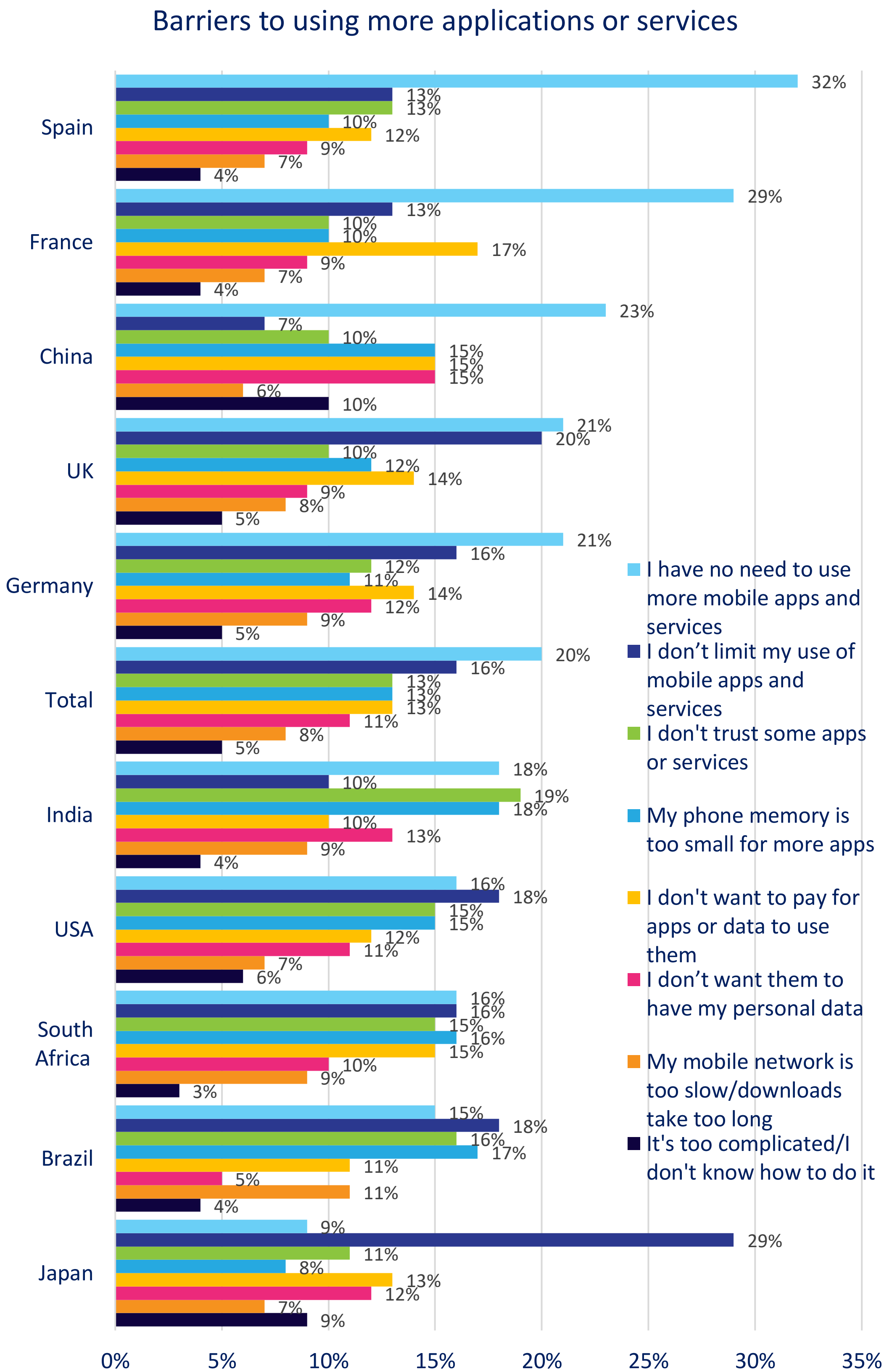
MOST BARRIERS TO USAGE HAVE REDUCED SINCE 2019



Most barriers to app usage have dropped since 2019, except for the feeling that phone memory is too small for modern apps.

But more users in 2020 feel no need for more apps. At the same time, more users in 2020 now do not limit their usage if apps.

COMPELLING NEW APPS AND SERVICES WILL UNLOCK HIGHER USAGE



The biggest barrier to increased usage is a lack of need.

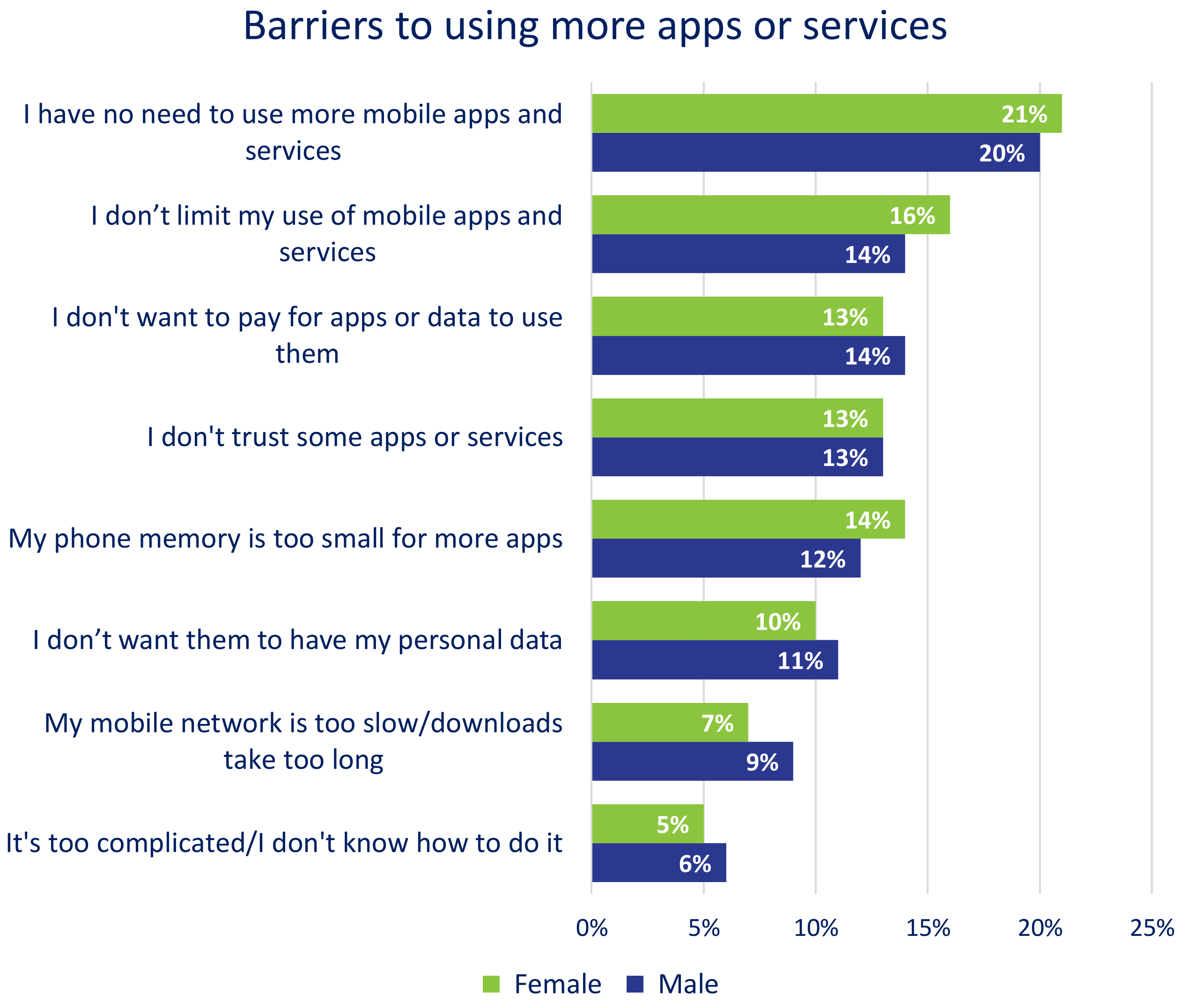
Growth will therefore be driven by apps and services that are innovative and compelling.

There are also some persistent barriers related to trust, as well as some resistance to paying for services (or for the necessary data).

However we can also see that activity or app complexity is not a notable barrier. Overall only 5% of users say activities or apps are too complicated.

Only 16% of users overall place no limits on their app usage so are easily open to higher usage. This figure rises to 29% in Japan but is only 7% in China.

MALE AND FEMALE USERS HAVE DIFFERENT CONCERNS

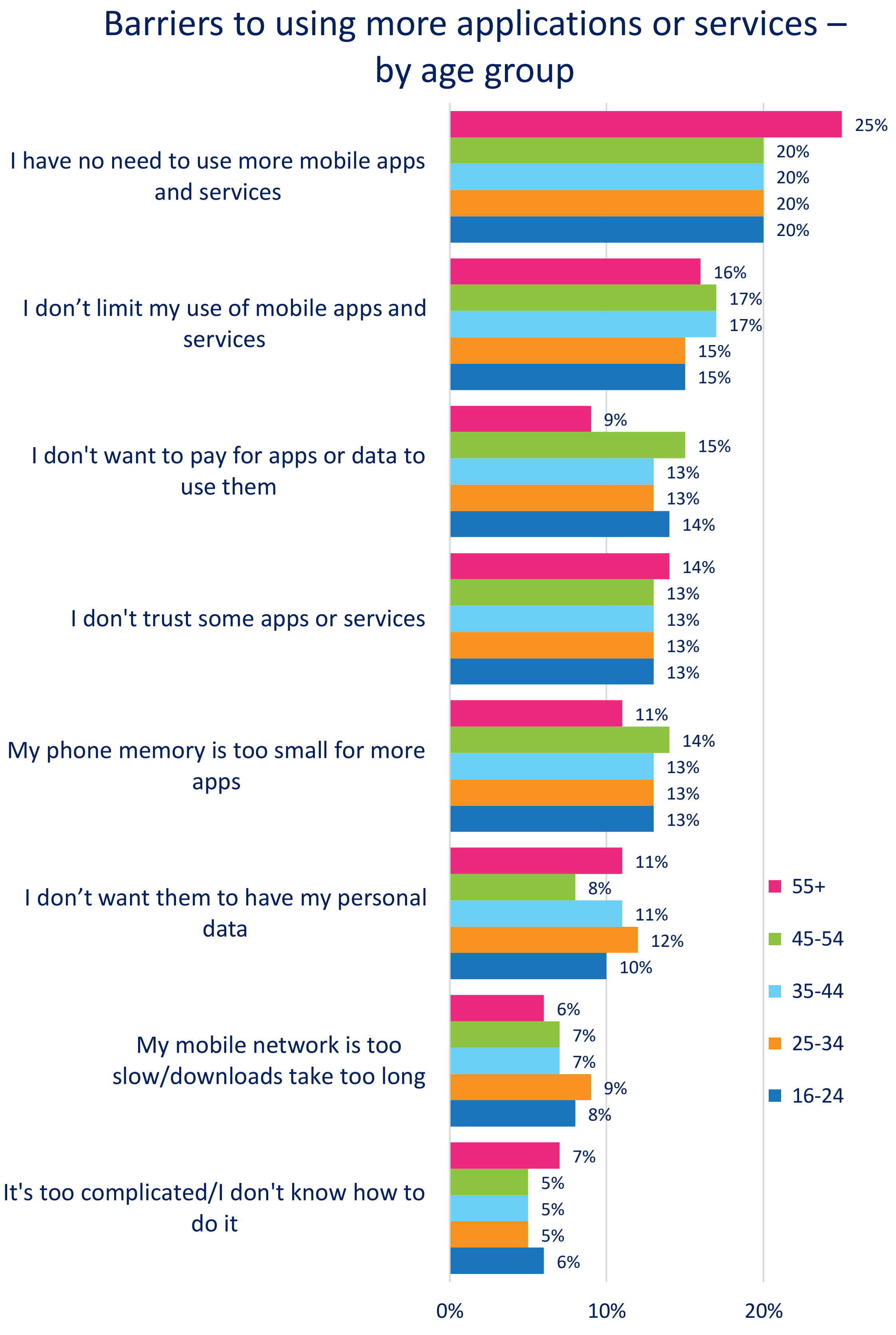


There are some small differences between male and female users. Female users will need slightly more persuading to use new services, but they are also slightly more limited by their phone capacity.

Male users are slightly more resistant to paying for services, have slightly more reservations about data trust and security, plus concerns about download speed.

We can also note that female users are slightly more open to increased usage of services.

OLDER USERS NEED MORE REASONS TO INCREASE THEIR USE OF APPS

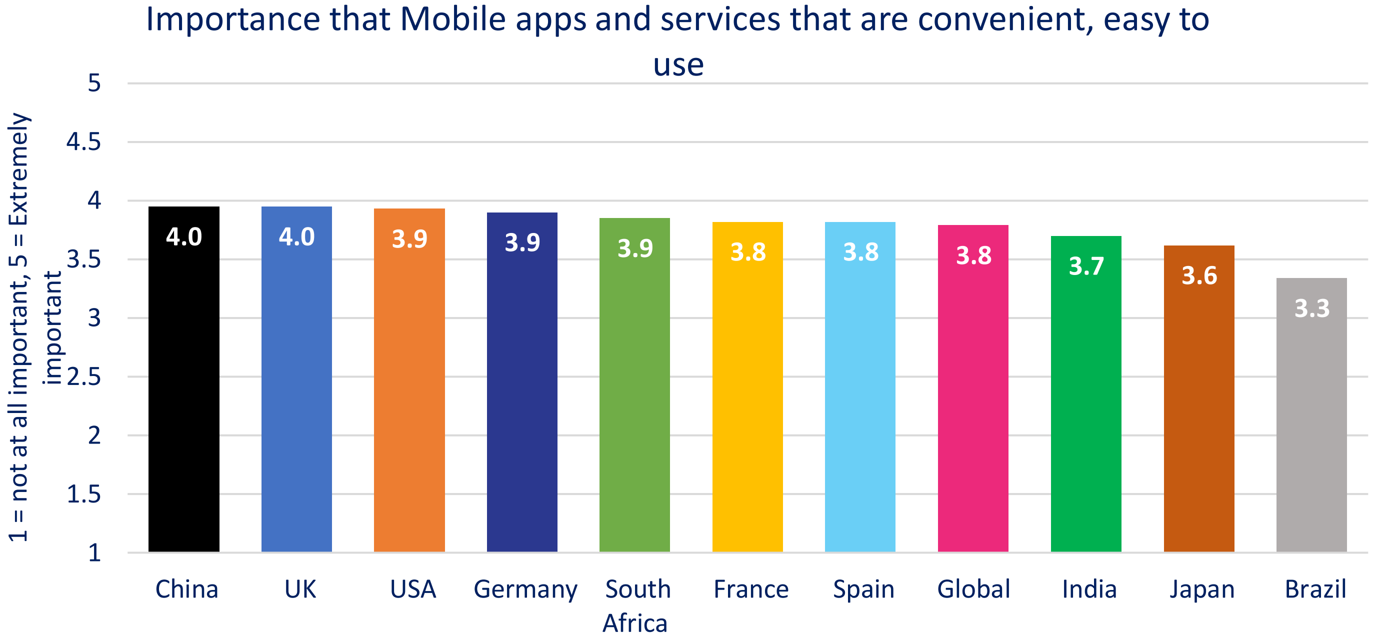


There is a general level of consistency across the age groups on barriers to usage.

Although the oldest age group feel they have the least need to use more services.

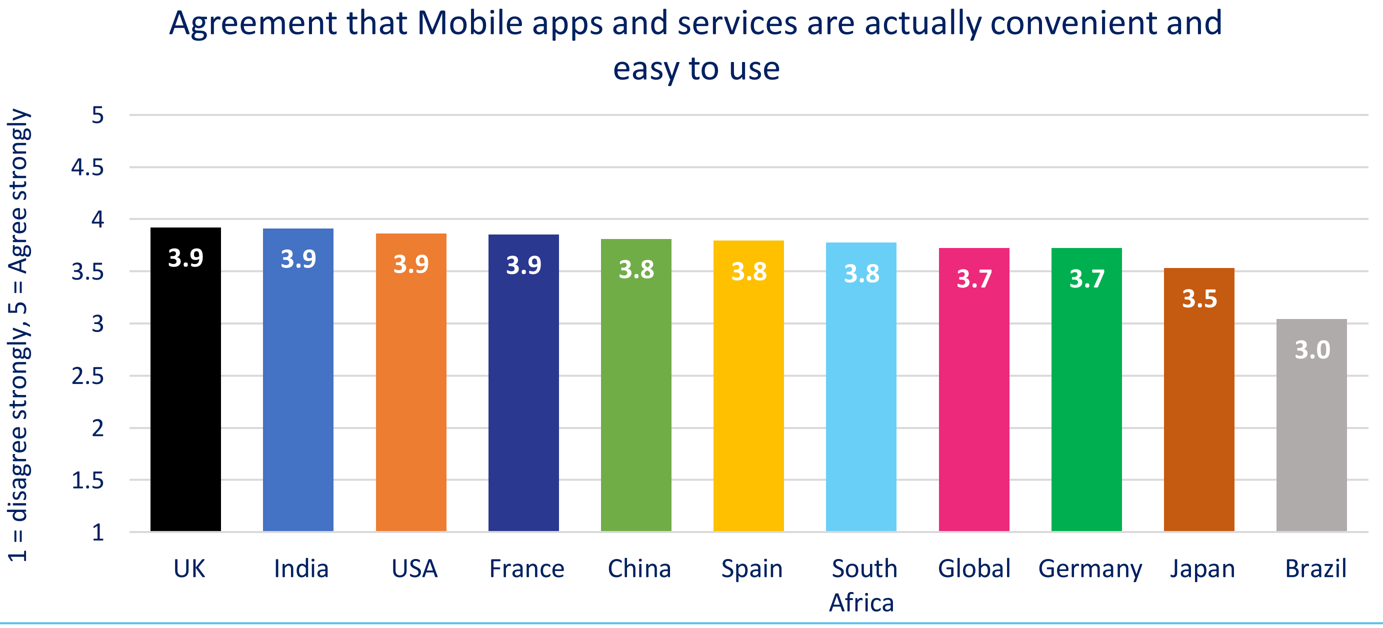
The oldest age group is also least concerned about paying for new services or data.

THE EXPERIENCE OF EASE OF USE IS NOT A BARRIER

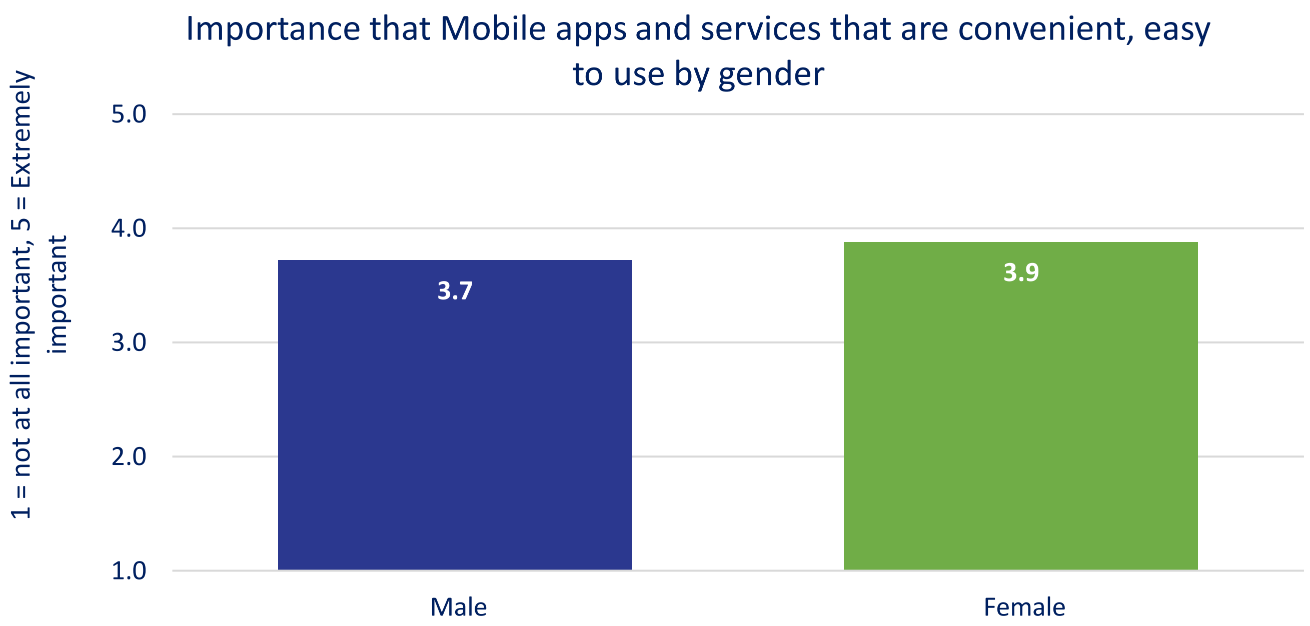


There is broad consensus that mobile apps and services must be easy to use. In reality users do find that apps and services are quite easy to use, though there is still clear room to improve. This is more noted in Brazil where there seems to be some greater need for improvement although ease of use is felt a little less important.

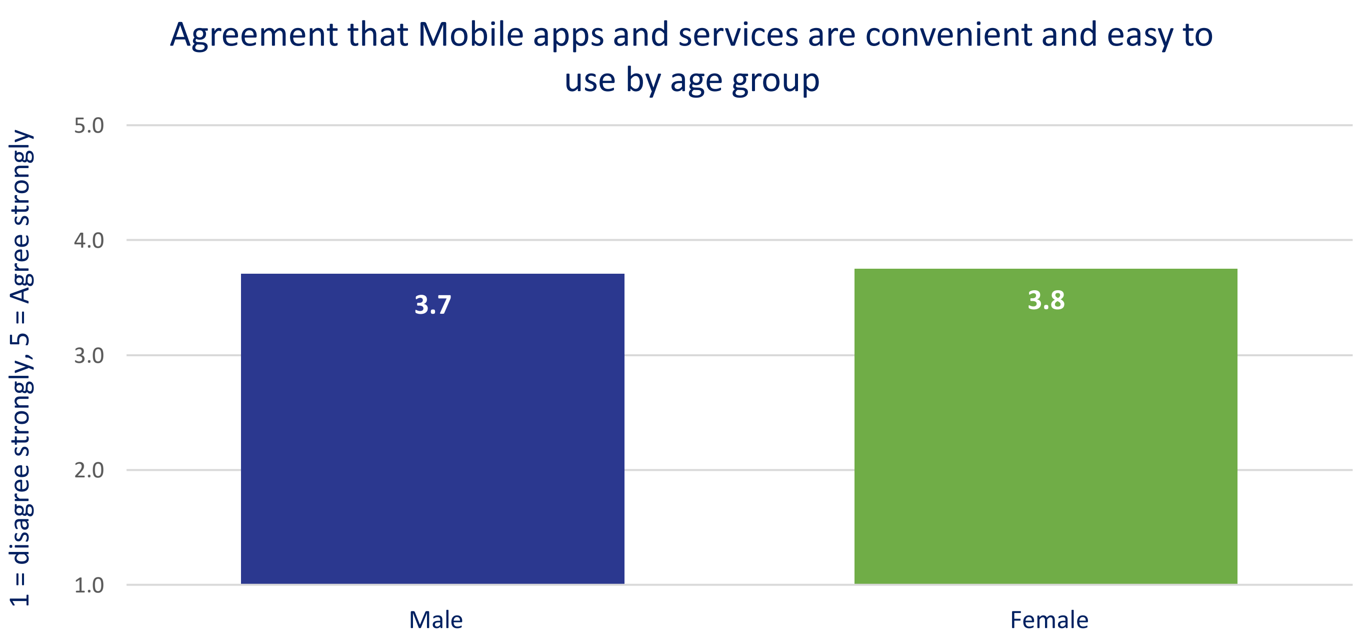
We can note that, for example, users in India are a little less concerned about ease of use, yet their experience of ease of use is good.



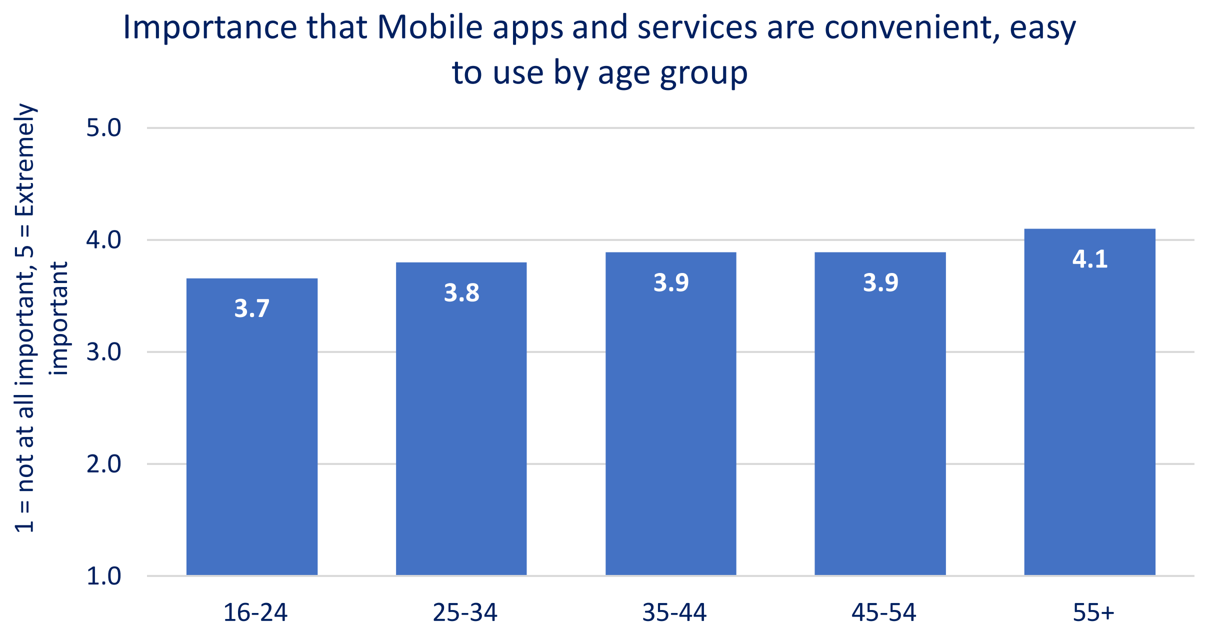
THERE IS A SIMILAR GENDER EXPERIENCE OF EASE OF USE



Female users feel it is slightly more important that apps and services are easy to use. Their experience of apps and services convenience and ease of use though is similar.

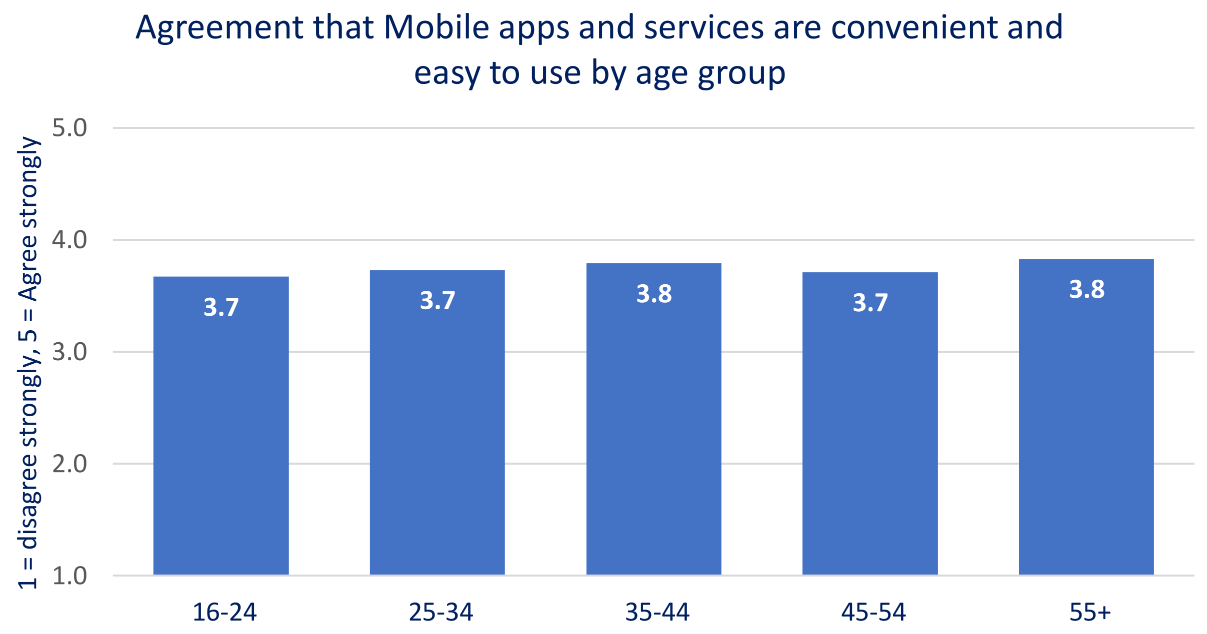


OLDER USERS FEEL A GREATER NEED FOR EASY SERVICES

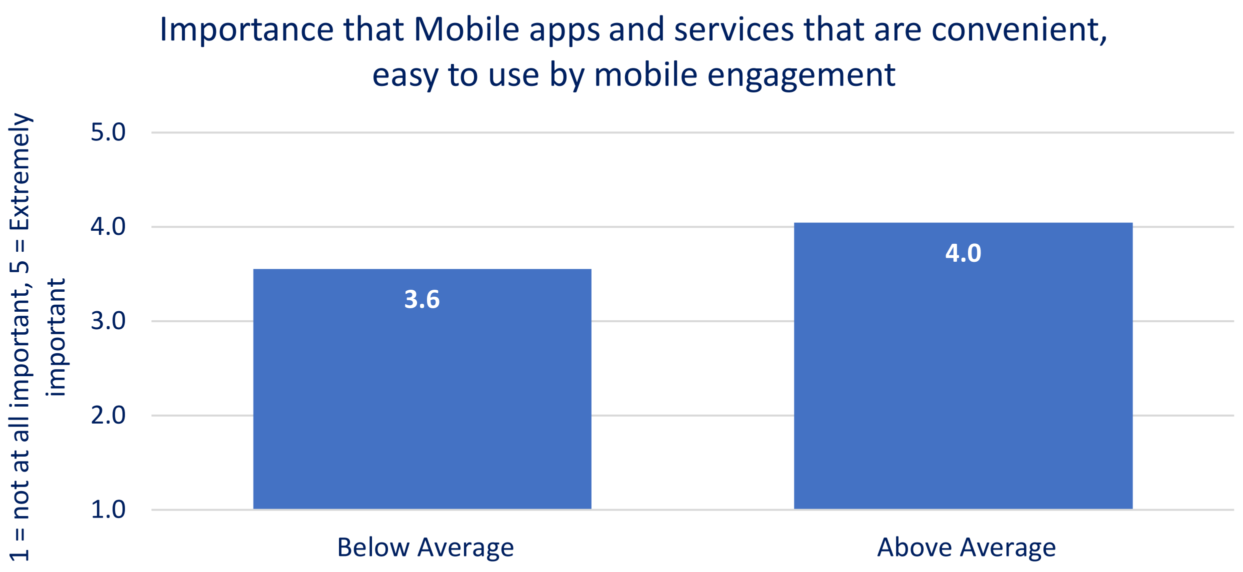


The importance of convenience and ease of use rises with age group, with the oldest age group scoring 4.1 vs the global average of 3.8.

The actual experience is mostly consistent across age groups suggesting that while complexity is not a major barrier for older users, simple convenience and ease of use may be.

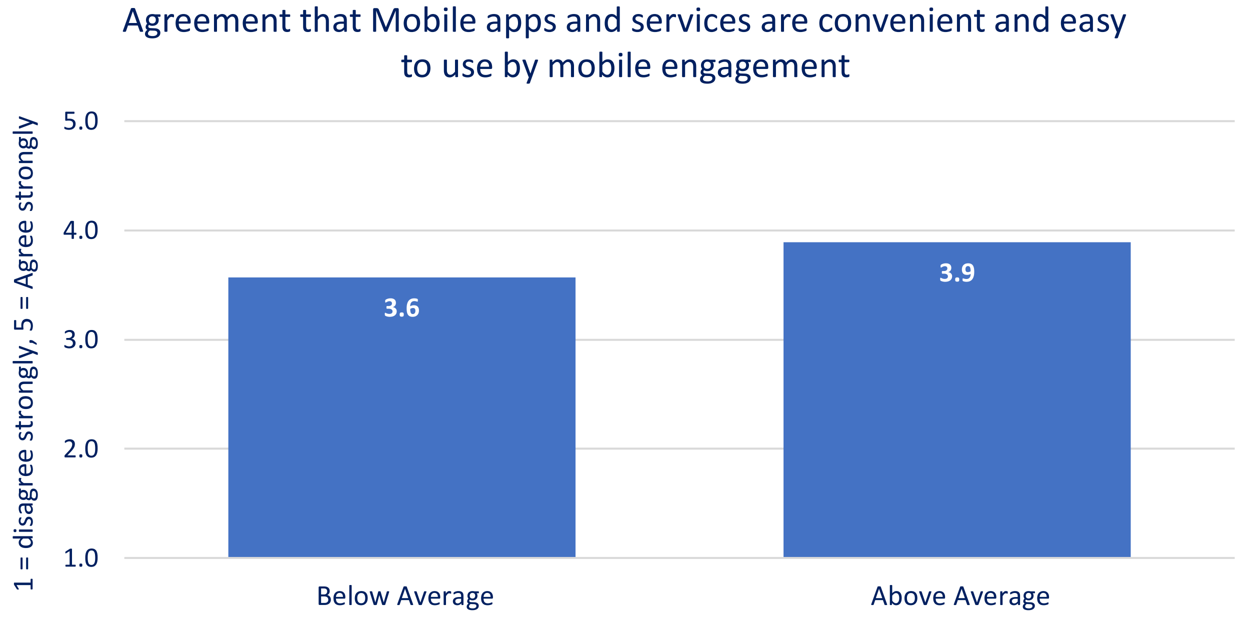


EXPERIENCED USERS FEEL A GREATER NEED FOR EASY SERVICES



Users with above average mobile engagement see a clear greater need for ease of use and convenience in the apps and services they use.

And this seems to be matched by their experience.



APP USAGE DEEP DIVE

IOS, OLDER USERS, AND SOCIAL MEDIA LEAD THE WAY

5 key points on activity deep dive

1. **IOS drives more frequent app usage**

   More IOS users are more regularly active in each of these 6 apps than Android users.

2. **Brazil usage is heavily constrained by cost**

   Despite being very popular, frequency of application usage in Brazil is significantly lower than other countries. High data costs mean that users must be very careful with their data.

3. **Social media is the most compelling app**

   Social media drives the most frequent usage. In Japan, while only 44% of smartphone users say they use social media, 95%of those indulge at least once every week

4. **Food delivery in China is becoming mainstream**

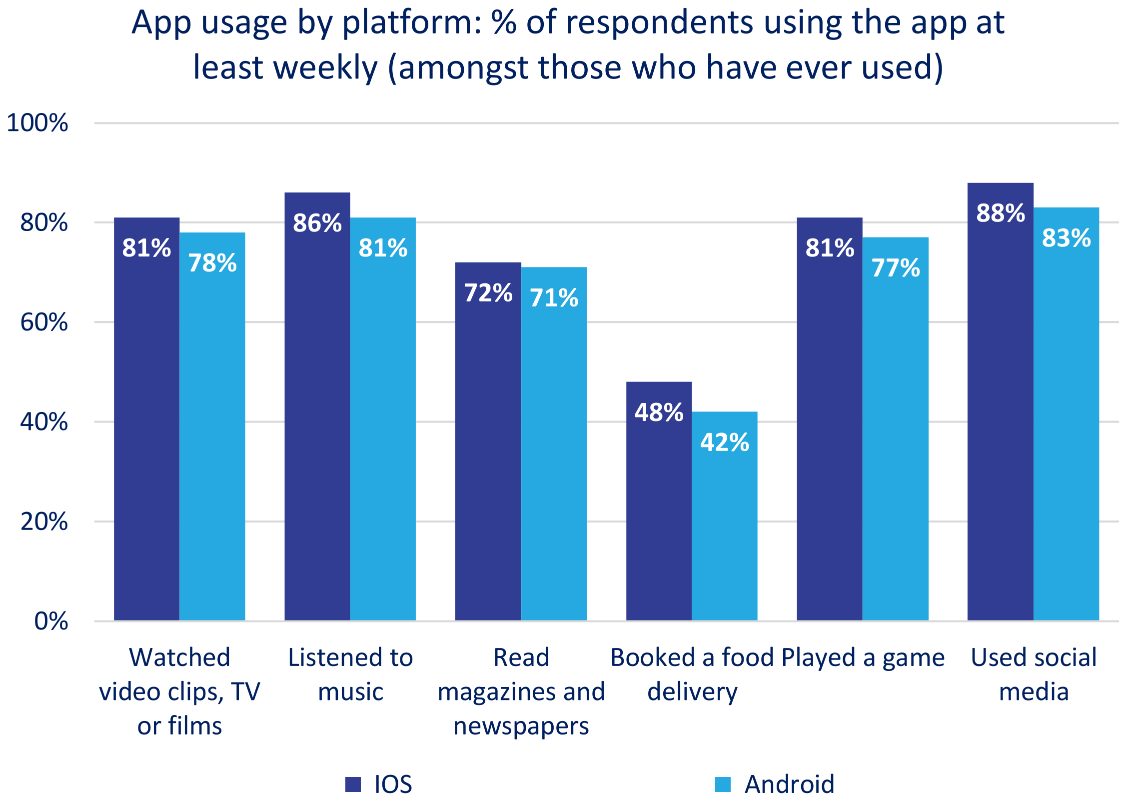
   While availability of ordering a food delivery is still an emerging activity, China has embraced it with 47% of those who ever book a delivery doing so at least every week.

5. **Older users like gaming on smartphones**

   While a respectable 64% of older users have ever played a smartphone game, we see that 87% of those do so at least once per week.

APP USAGE BY PLATFORM

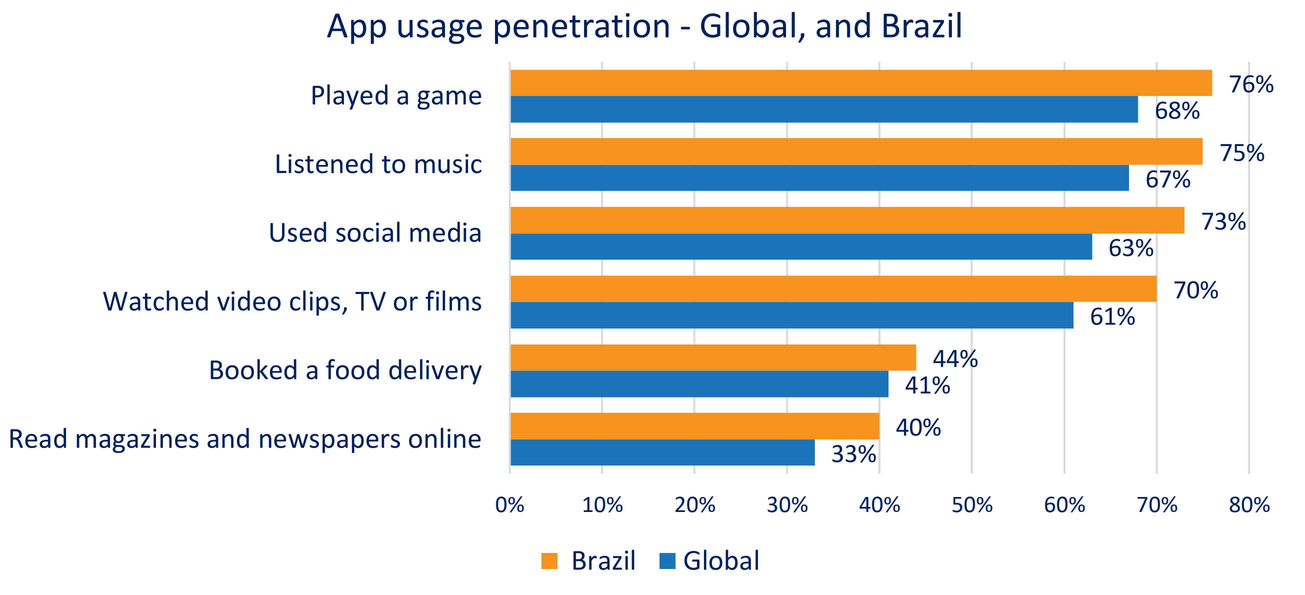
If we look at frequency of app usage by mobile platform (all those who have done the activity at least once per week), we can see that generally those users on IOS tend to be a little more active than those on Android.



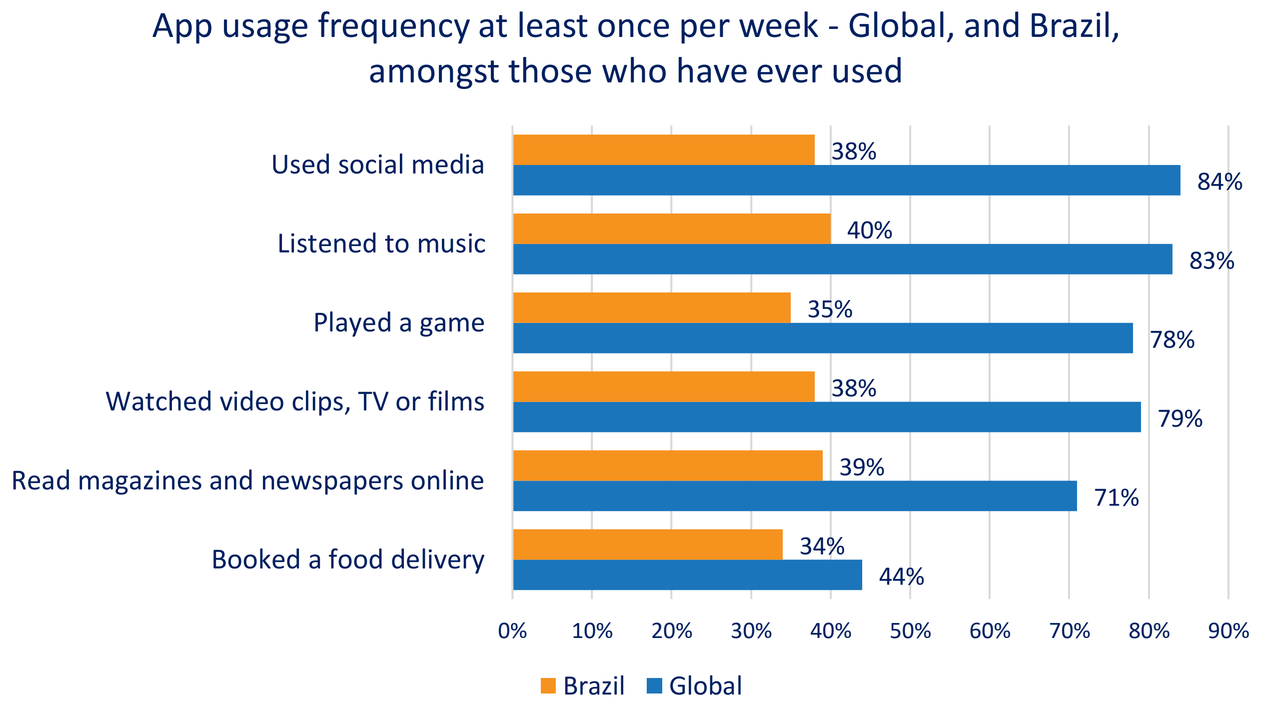
The difference in usage frequency is most pronounced in booking food delivery, but least pronounced for reading newspapers and magazines.

SMARTPHONE ACTIVITY - BRAZIL

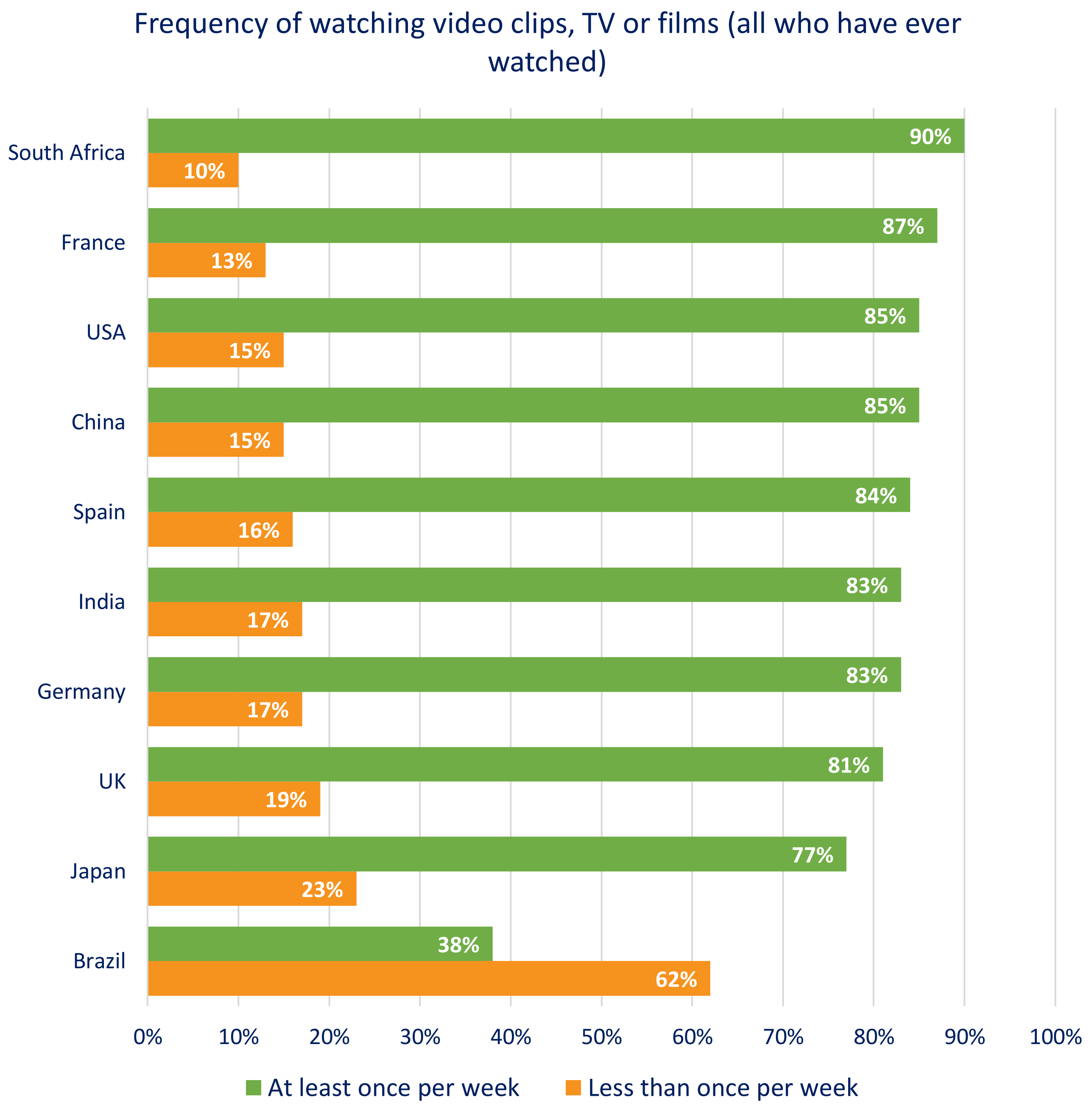
Analysed by country, the % of users who ever undertake any of 6 core activities is reasonably consistent. We can see here that in terms of the % of smartphone users ever taking part in one of these activities, Brazil is actually ahead of the global average.



But if we analyse by how often these users actually take part in an activity, frequency of use is far lower in Brazil than the global average. Further checking within the market suggests this is due to local data costs that inhibit more frequent usage. Users in Brazil tend to be very careful with their data usage!



VIDEO IS WATCHED MOST OFTEN IN SOUTH AFRICA

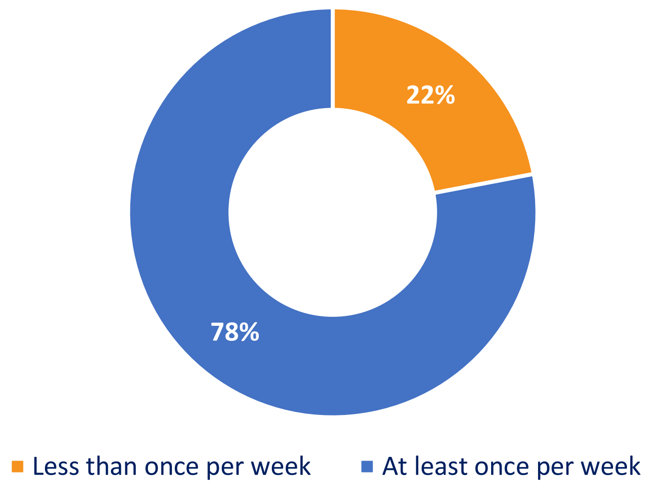


Watching video content is the 4th most frequent global app activity, at 61% of all users. By far the majority of those who watch video content do so at least once every week, in every country except Brazil.

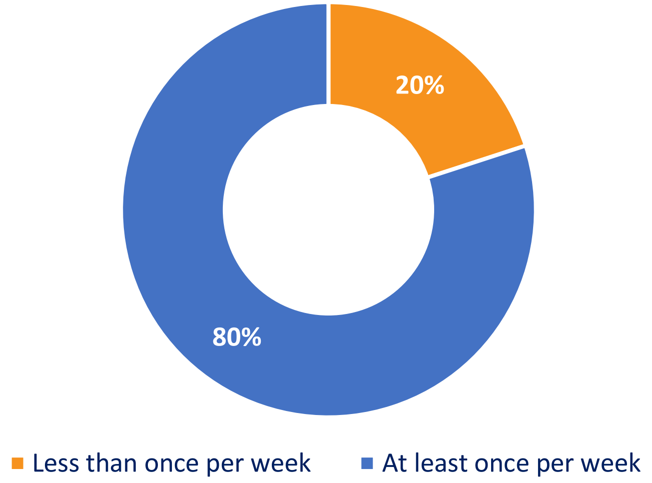
Watching video content is more popular in Brazil than most other countries – but those that do watch video watch it much less frequently than users in other countries. In Brazil, only 38% of those who listen to music do so more than once per week, compared to 90% in South Africa.

WATCHING VIDEO IS LED BY FEMALE USERS

Frequency of watching video clips, TV or films (all male users who have ever watched)

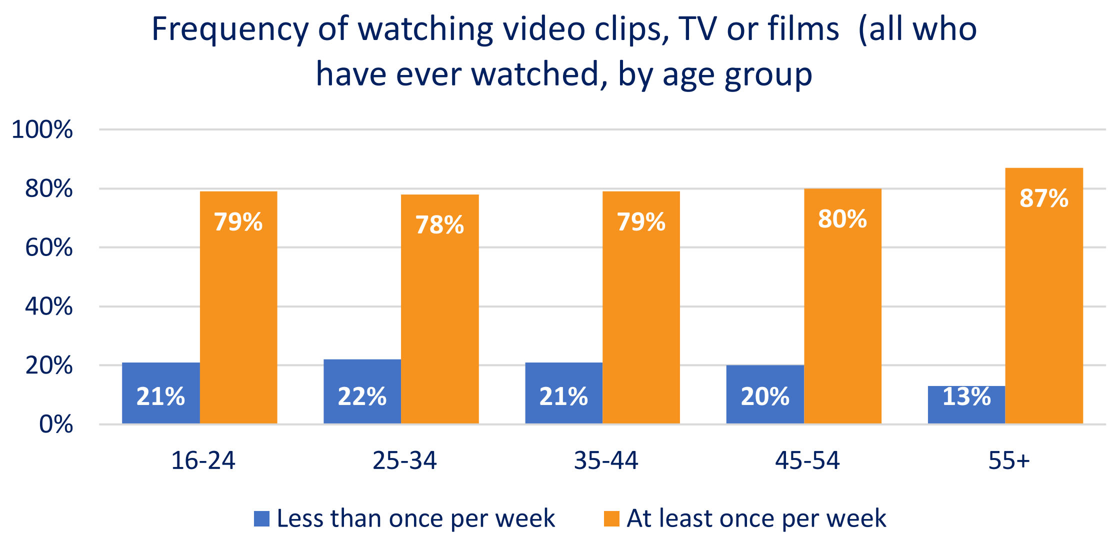


Frequency of watching video clips, TV or films (all female users who have ever watched)



Globally, female users watch video more often than male users. 80% of female users watch video at least once per week, compared to 78% of male users.

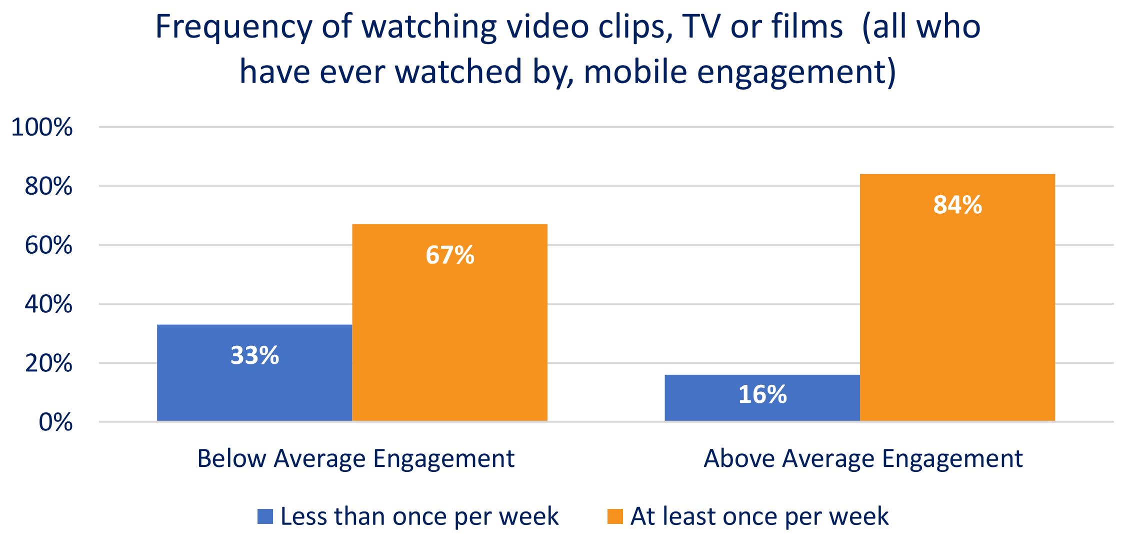
OLDER AGE GROUPS WATCH MORE VIDEO CONTENT



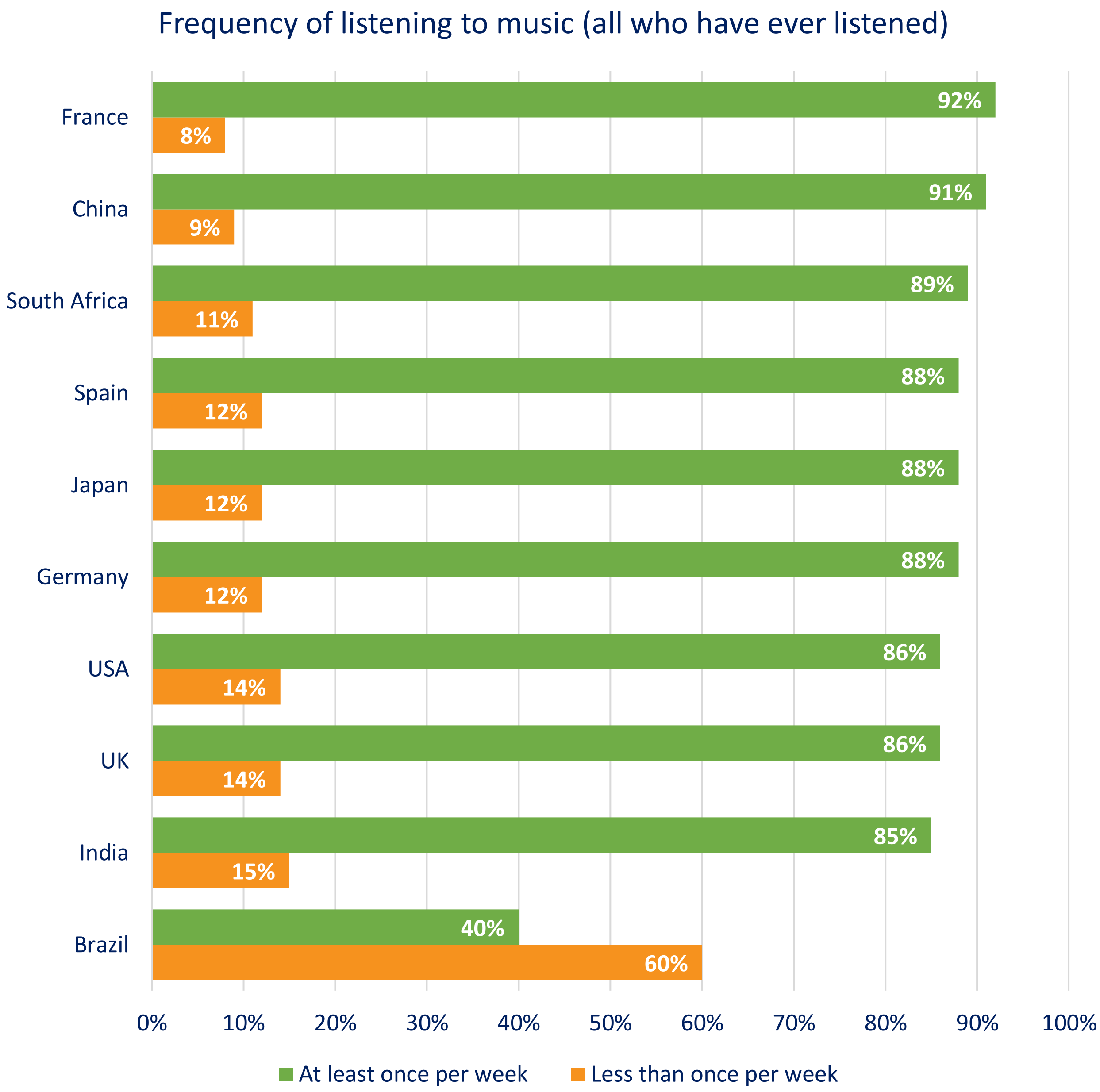
Watching video, TV or film content apps increases with age group.

- 79% of 16 – 24-year-old age group watch video at least once per week compared to 87% of the 55+ year old group.

Analysed by the level of mobile engagement, we can see that 84% of users with above average engagement watch video content at least once every week, compared to just 67% of those with low mobile engagement.



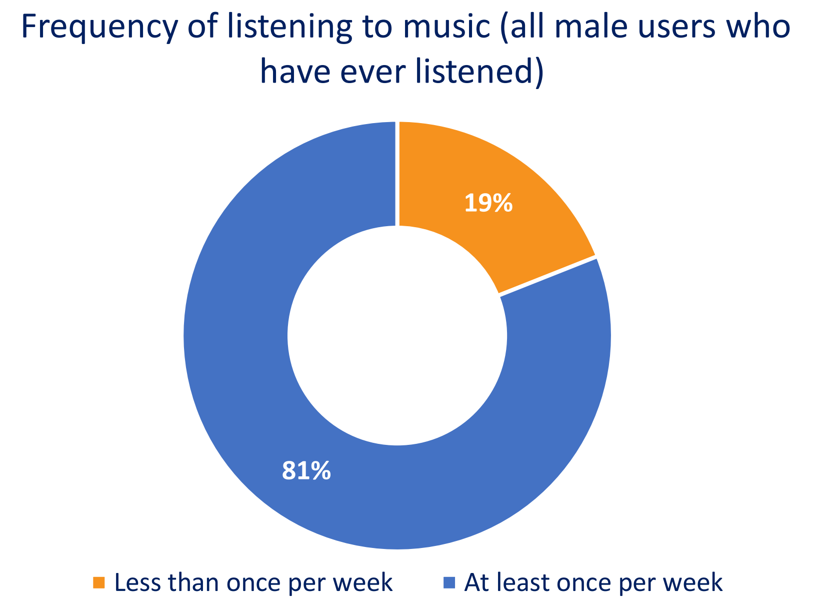
FRANCE AND CHINA LEAD IN LISTENING TO MUSIC

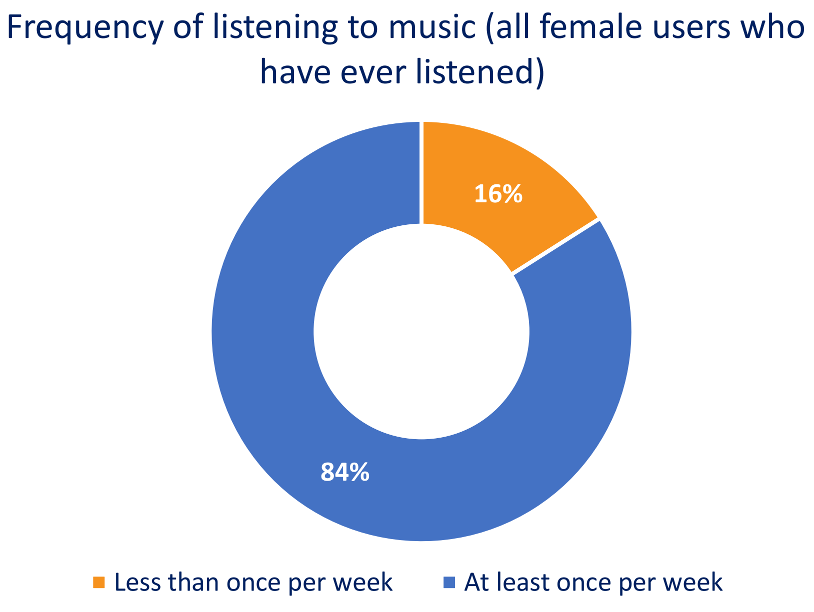


Listening to music is the 2nd most frequent global app activity, at 67% of all users. By far the majority of those who listen to music do so at least once every week, in every country except Brazil.

At 75% of users, listening to music is more popular in Brazil than all other countries surveyed – but those that do listen do it much less frequently than users in other countries. In Brazil, only 40% of those who listen to music do so more than once per week, compared to 92% in France.

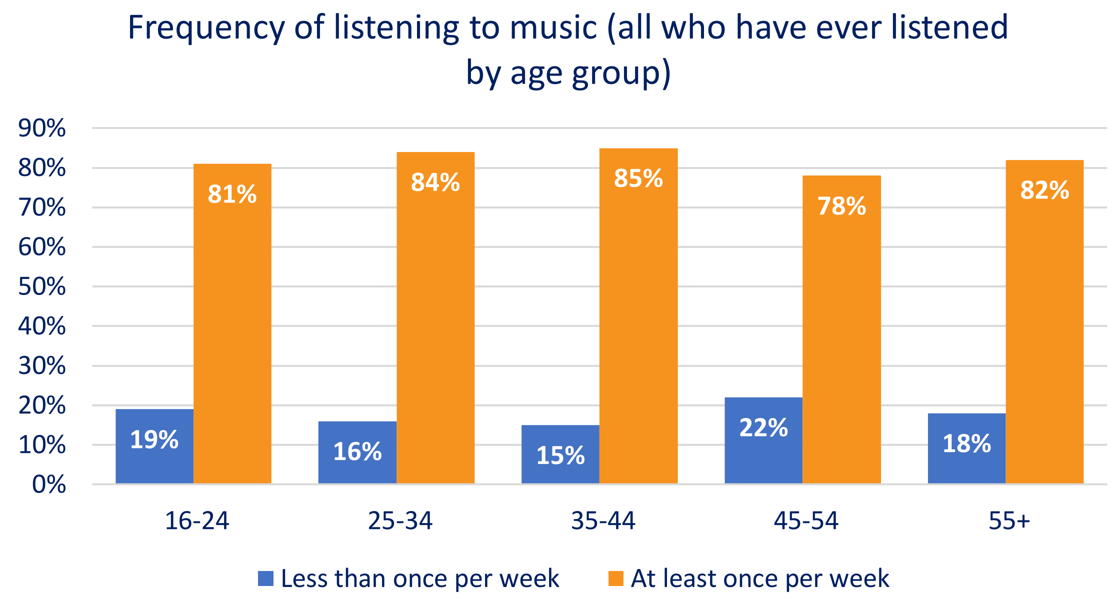
MALE USERS LEAD IN LISTENING TO MUSIC





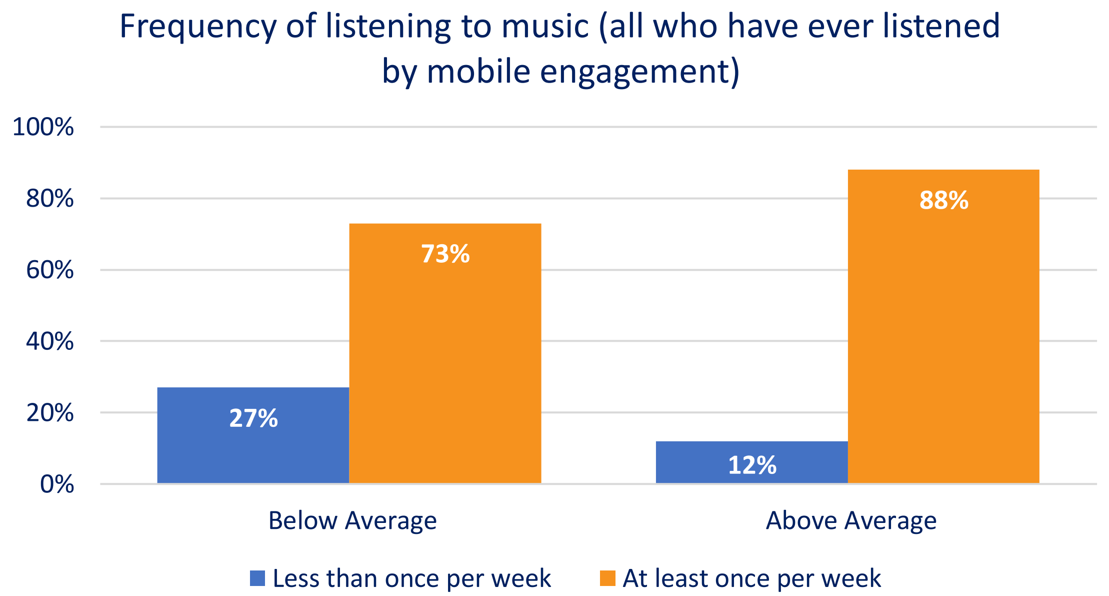
Similar to watching video, globally female users listen to music more often than male users. 84% of female users watch video at least once per week, compared to 81% of male users.

OLDER AGE GROUPS WATCH MORE VIDEO CONTENT

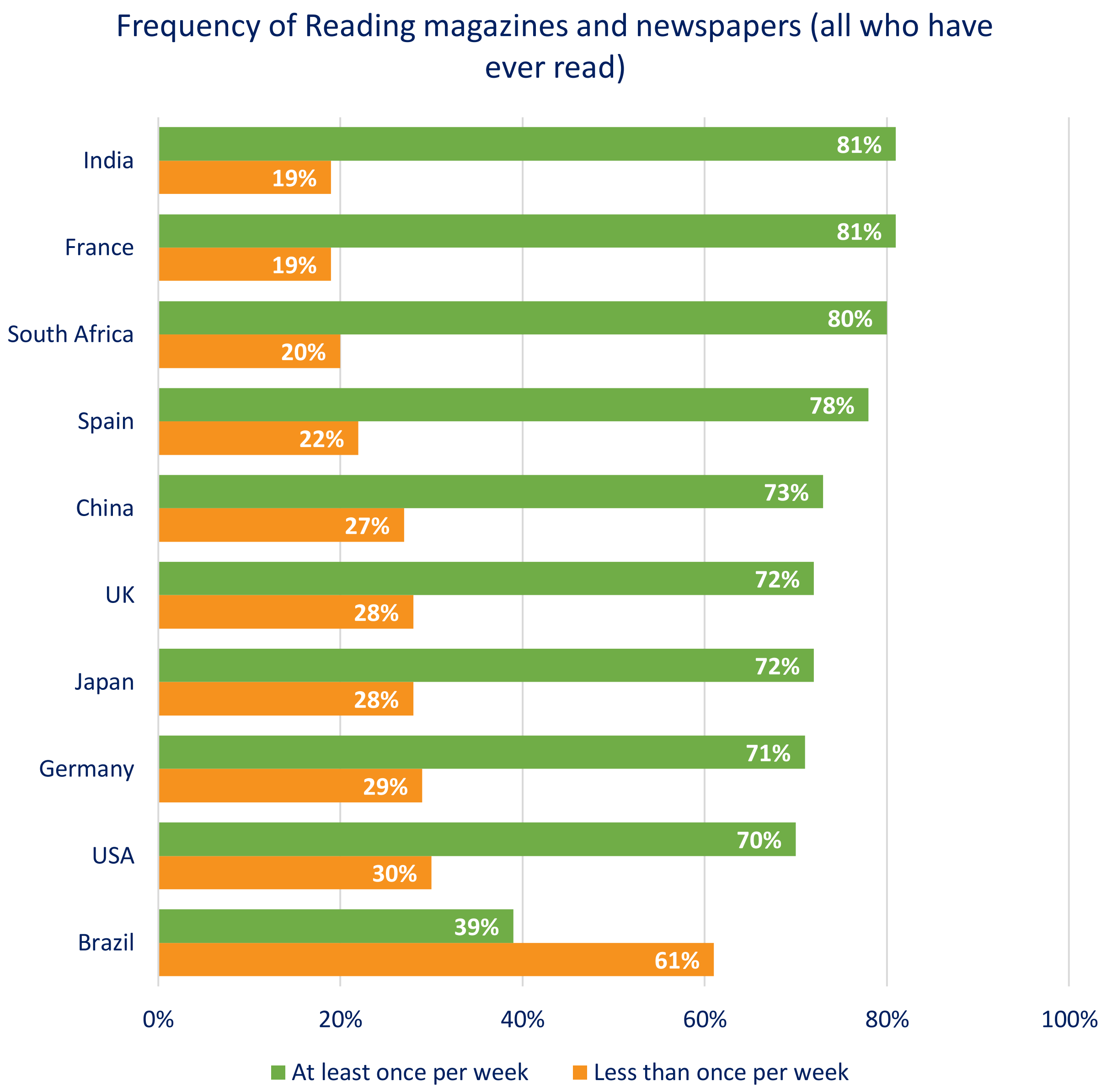


Listening to music tends to peak with the mid age groups, at 35 to 40 years.

Analysed by the level of mobile engagement, we can see that 88% of users with above average engagement watch video content at least once every week, compared to just 73% of those with low mobile engagement.



INDIA AND FRANCE EMERGE AS AVID READERS

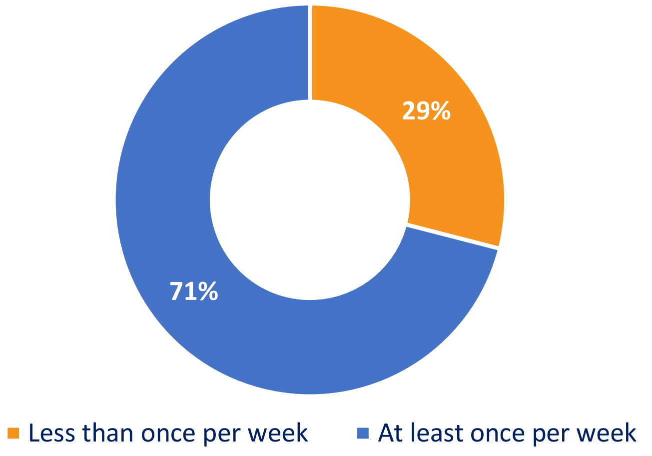


Globally only 33% of all users read newspapers or magazines on their devices. For those that do read, this is not quite such a common activity as watching video or listening to music, though the majority of those who read do so at least once every week, in every country except Brazil.

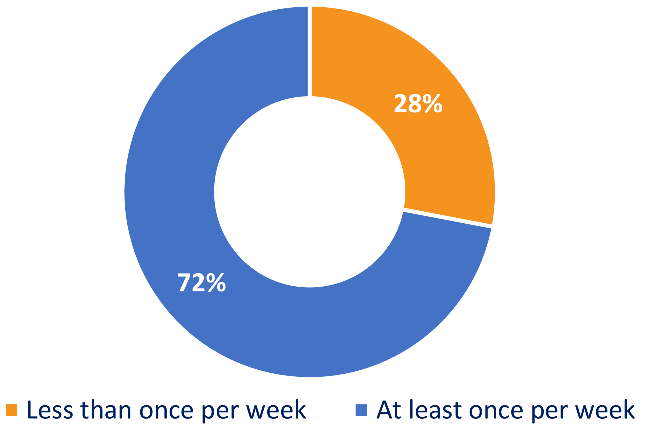
At 40% of users, reading newspapers and magazines apps is more popular in Brazil than all other countries surveyed – but those that do read do so much less frequently than users in other countries. In Brazil, only 39% of those who read do so more than once per week, compared to 81% in India.

READING MAGAZINES AND NEWSPAPERS IS UNIVERSAL BY GENDER

Frequency of Reading magazines and newspapers
(all male users who have ever read)

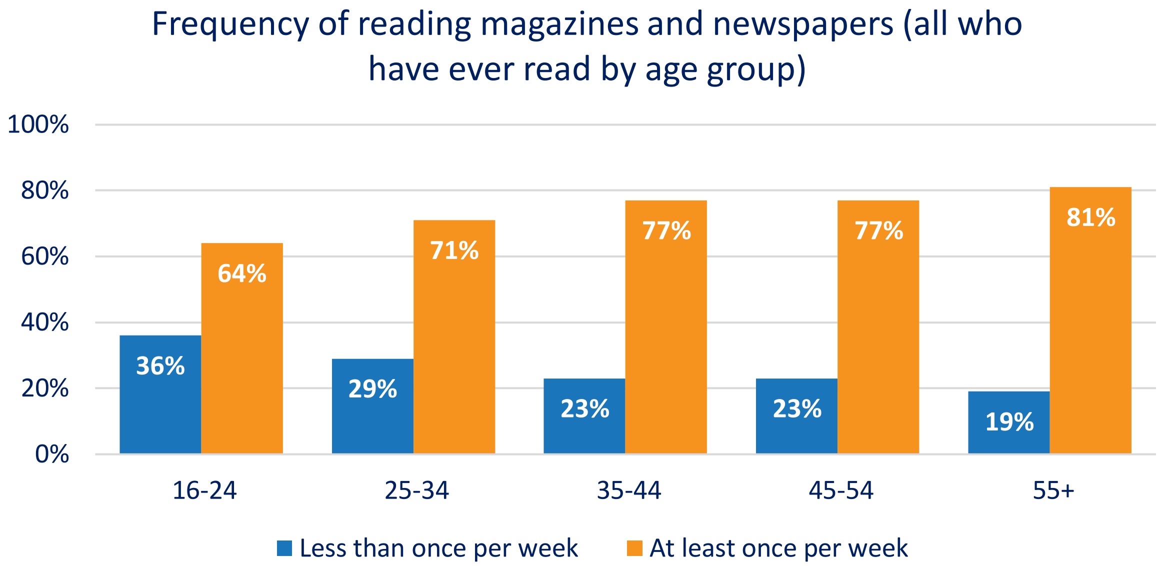


Frequency of Reading magazines and newspapers
(all female users who have ever read)



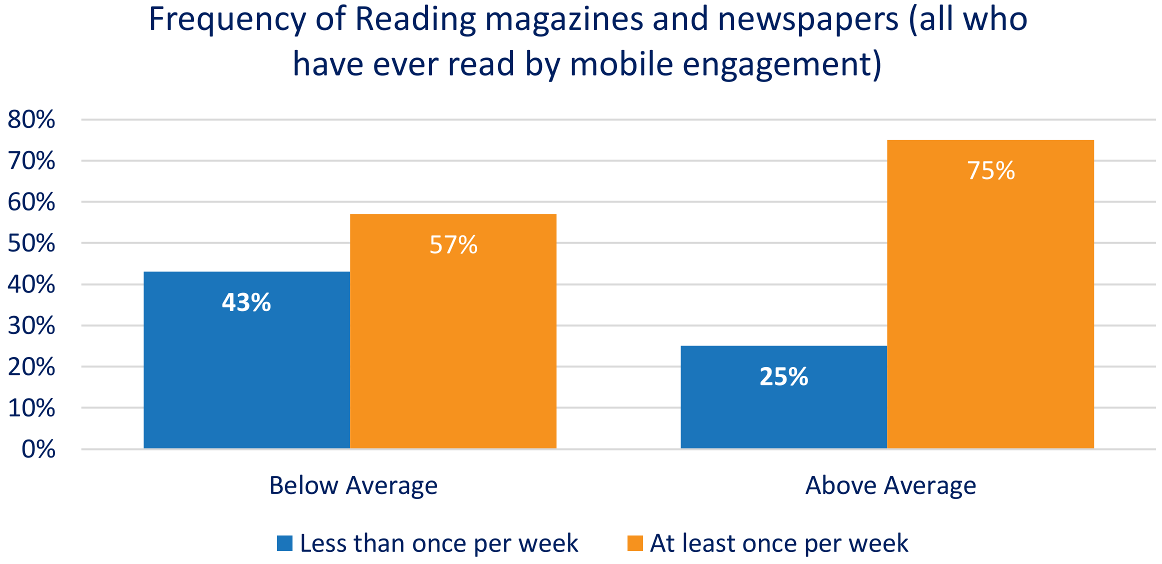
Both male and female users read newspapers and magazines apps more or less equally, but generally quite a lot less so than watching video or listening to music.

OLDER AGE GROUPS READ MORE



There is a consistent rise across age groups in reading magazines and newspapers. Of those that do read, 81% of the 55+year age group read every week.

Analysed by the level of mobile engagement, we can see that 75% of users with above average engagement read magazines and newspapers at least once every week, compared to just 57% of those with low mobile engagement.



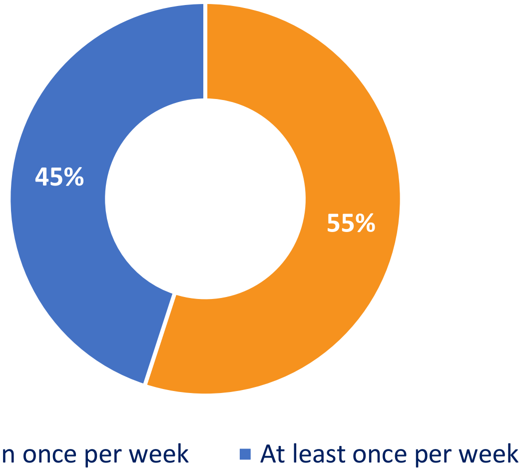
BOOKING A FOOD DELIVERY IS BECOMING MAINSTREAM IN CHINA

Booking a food delivery is an emerging app except in China and is constrained by availability of such a service. Only 41% of users worldwide have ever booked a food delivery via their smartphone although we note that this rises to 60% in China.

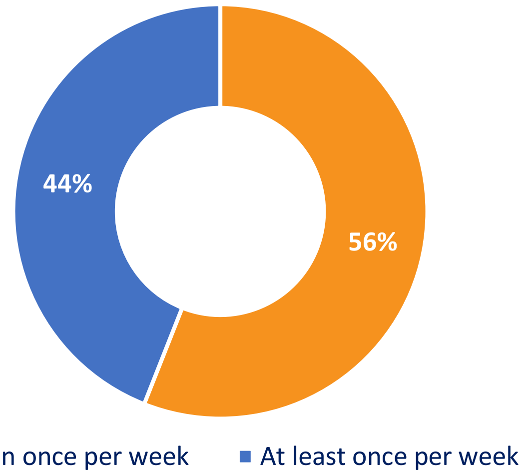
China also leads in frequency of use where of those who have ever booked a food delivery, some 79% do so at least every week.

BOOKING A FOOD DELIVERY IS UNIVERSAL BY GENDER

Frequency of booking a food delivery (all male users who have ever booked)

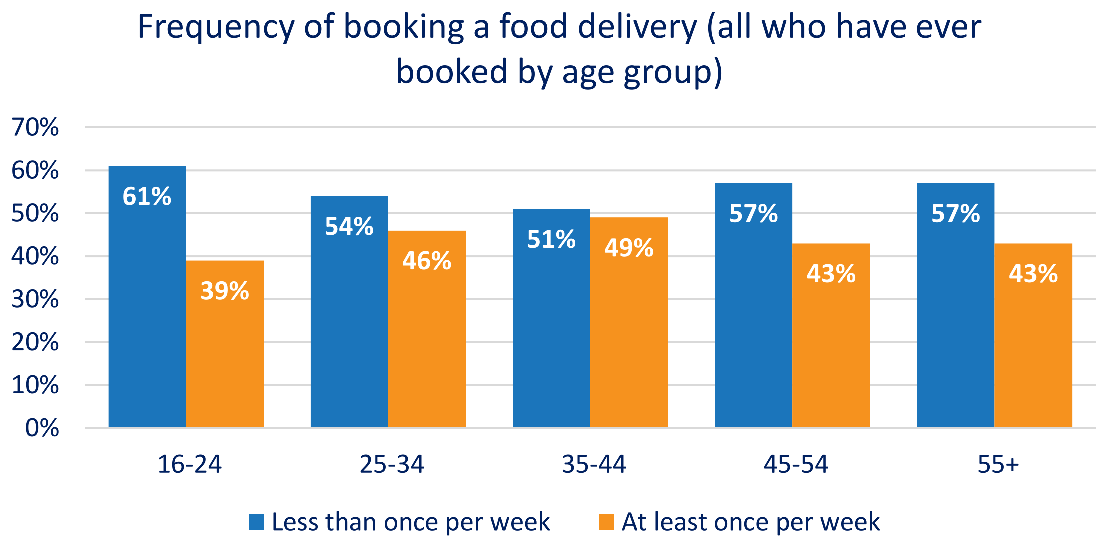


Frequency of booking a food delivery (all female users who have ever booked)



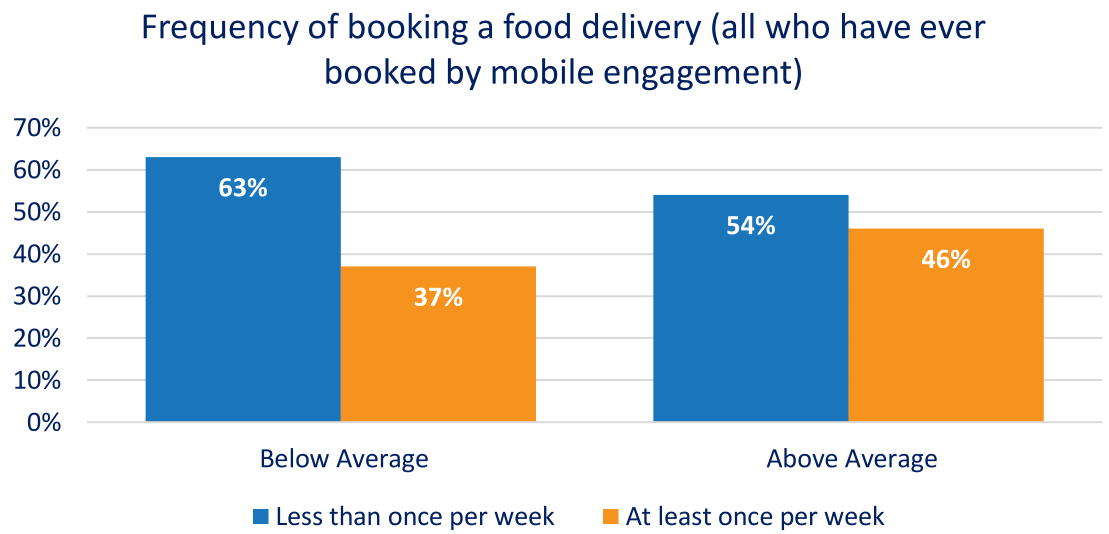
Both male and female users book food delivery more or less equally, but we can see that this is still an emerging app with relatively low global usage levels.

OLDER AGE GROUPS BOOK MORE FREQUENT FOOD DELIVERIES



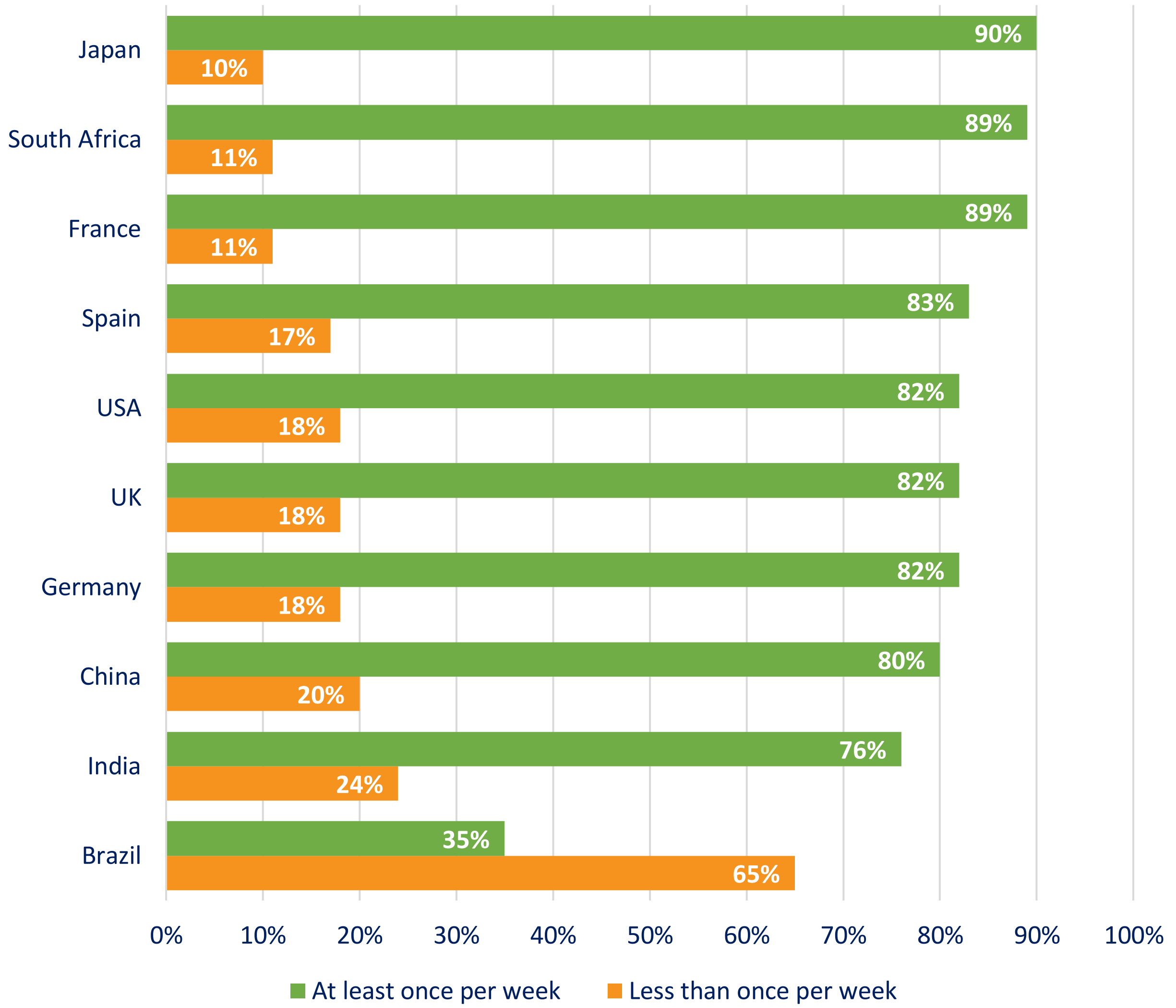
Booking food delivery peaks in the mid age groups, with 49% of the 35-to-44-year age group booking food every week.

Analysed by the level of mobile engagement, we can see that 46% of users with above average engagement have booked a food delivery at least once every week, compared to just 37% of those with low mobile engagement.



JAPAN, SOUTH AFRICA AND FRANCE ARE GAMERS

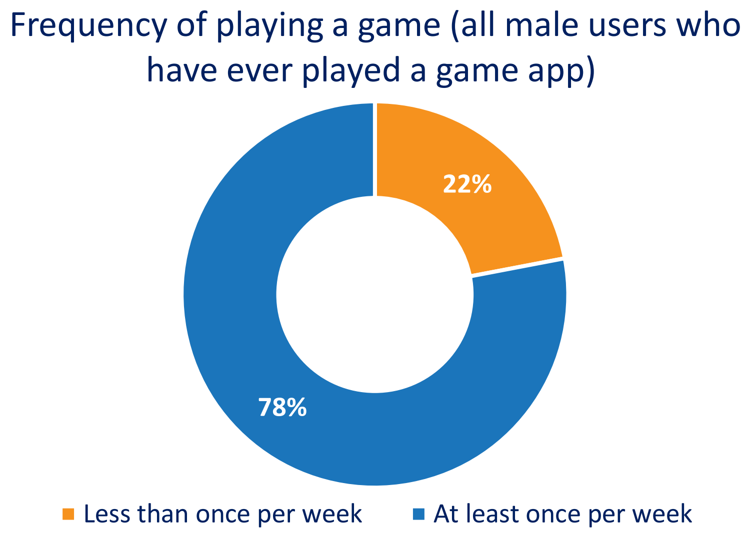
Frequency playing a game (all who have ever played a game on smartphone)

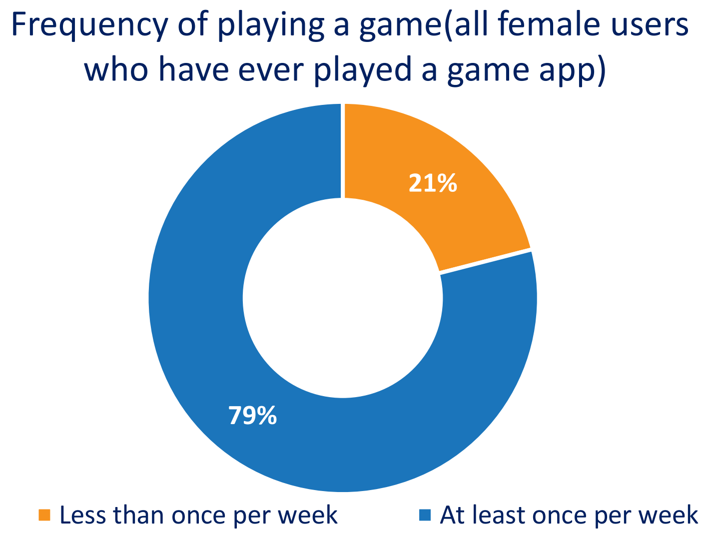


Playing games apps is the leading activity globally, where 68% of users have ever played a game app on their smartphone. Of those that do play, users in Japan lead the way where 90% play a game at least once a week.

Frequency of gaming in Brazil is again low.

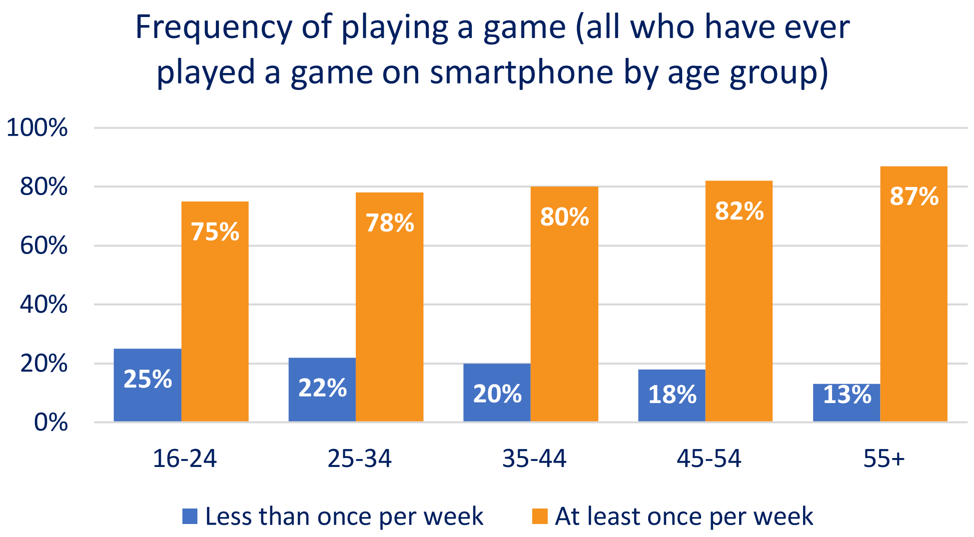
PLAYING GAMES IS UNIVERSAL BY GENDER





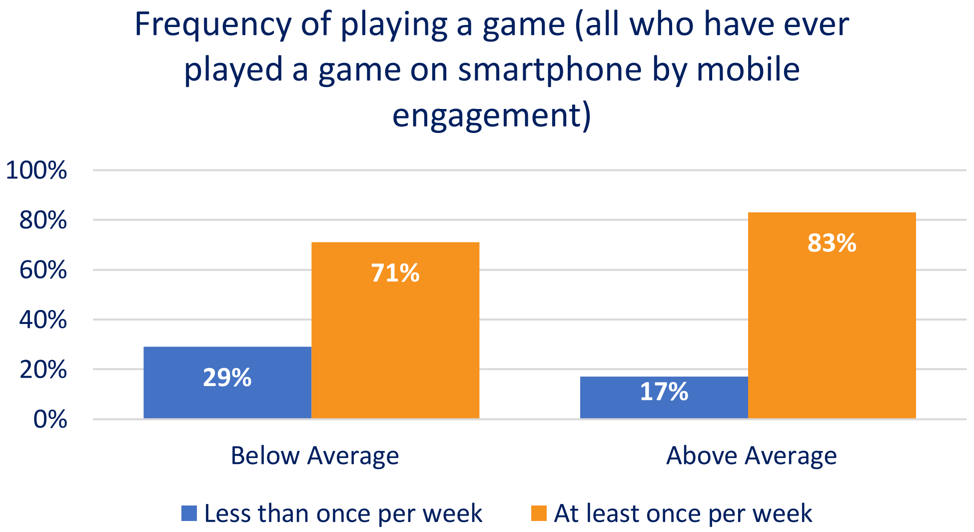
Frequency of game playing is comparable between male and female smartphone users. We can see that many more users play a game rather than, for example, book a food delivery and is more comparable to watching video content.

GAMING IS MORE PREVELANT WITH HIGHER AGE GROUPS

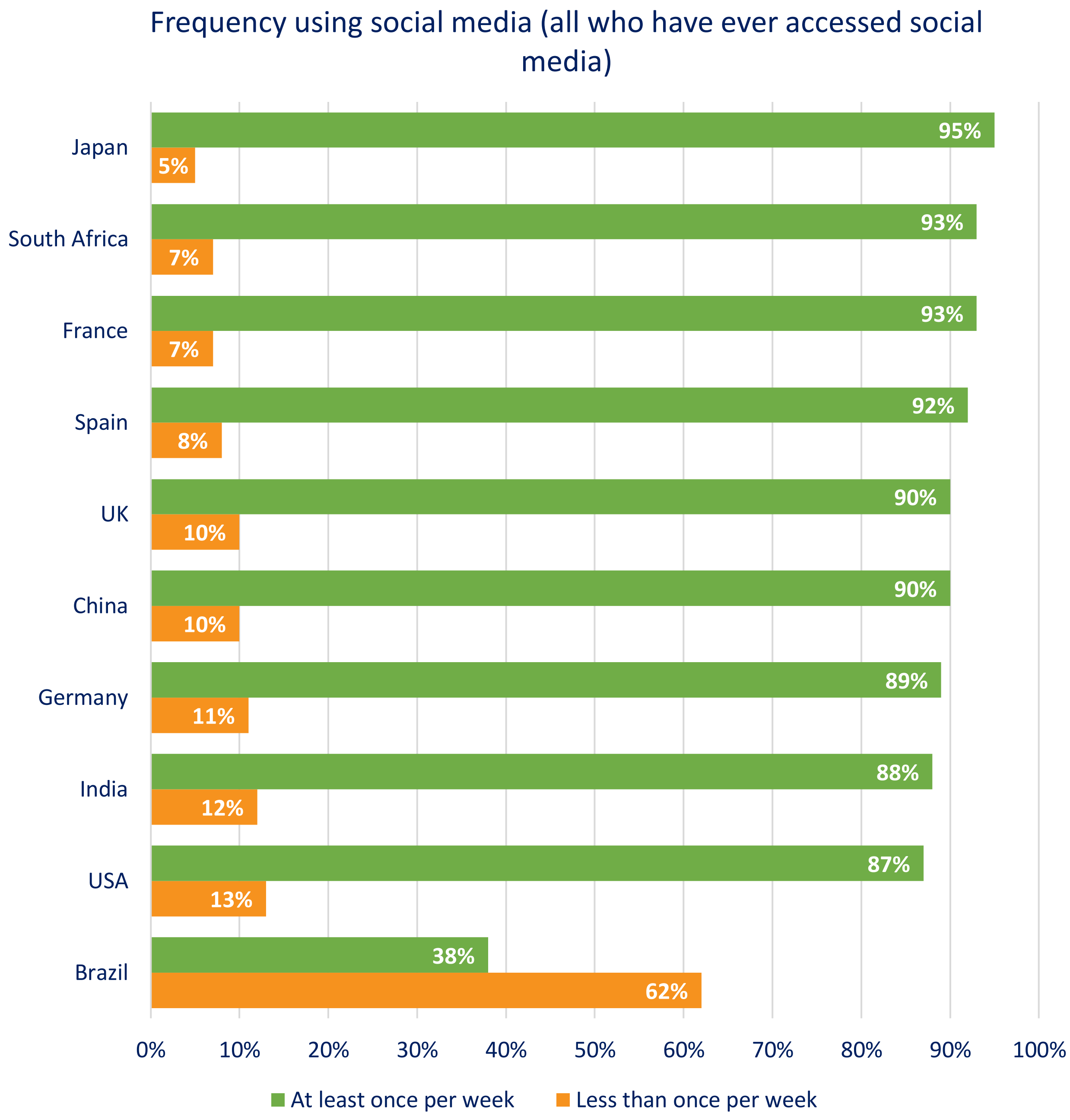


Interestingly the frequency of playing a game rises with age group with 87% of the 55+ year old age group playing at least once per week

Analysed by the level of mobile engagement, we can see that 83% of users with above average engagement play games at least once every week, compared to 71% of those with low mobile engagement.



JAPAN LEADS THE WAY WITH SOCIAL MEDIA

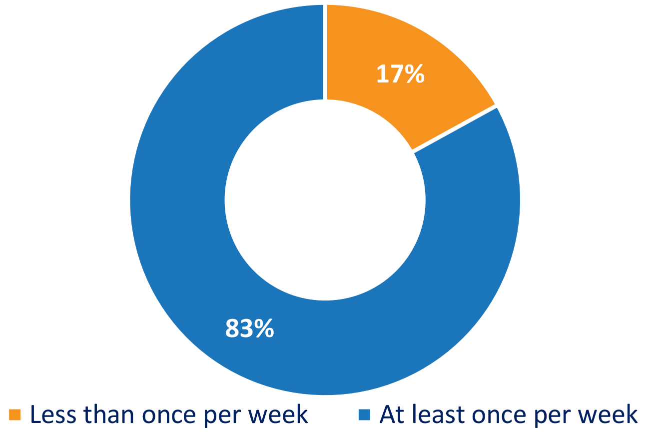


Social media is one of the most popular apps with 63% of all users globally using social media at some point.

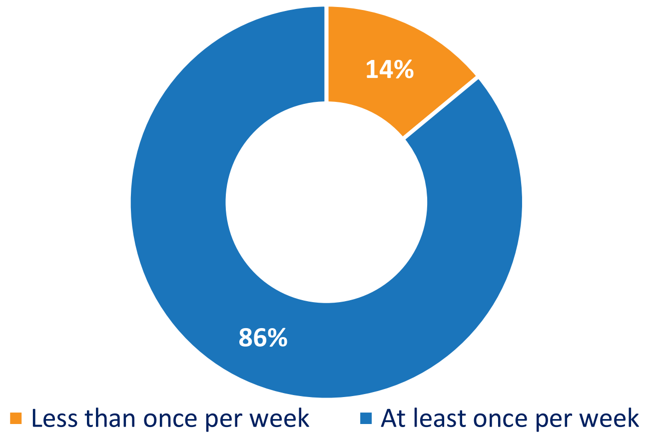
Amongst those who do use social media, Japan leads the way with 95% of social media users being active on platforms at least every week.

FEMALE USERS ARE MORE REGULAR SOCIAL MEDIA APP USERS

Frequency of using social media apps (all male users who have ever used social media apps)

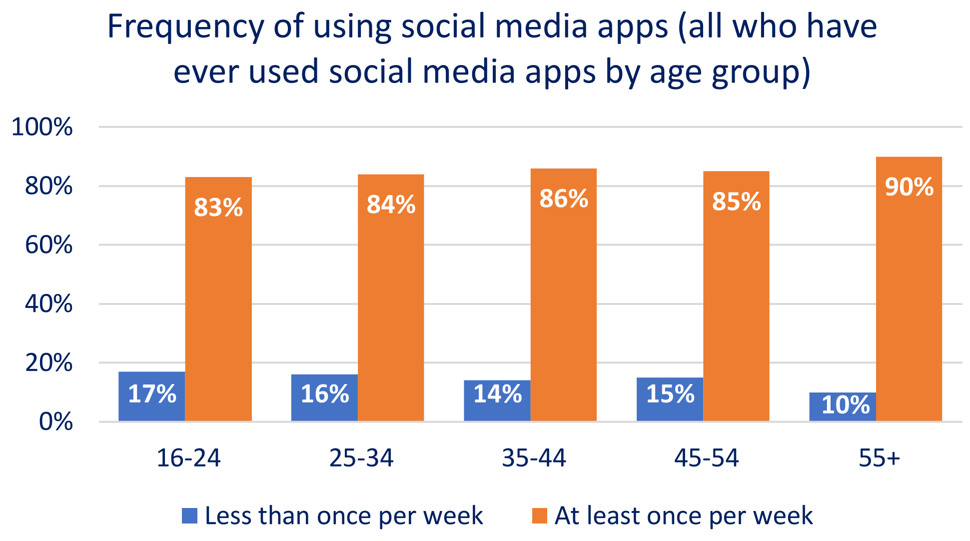


Frequency of using social media apps (all female users who have ever used social media apps)



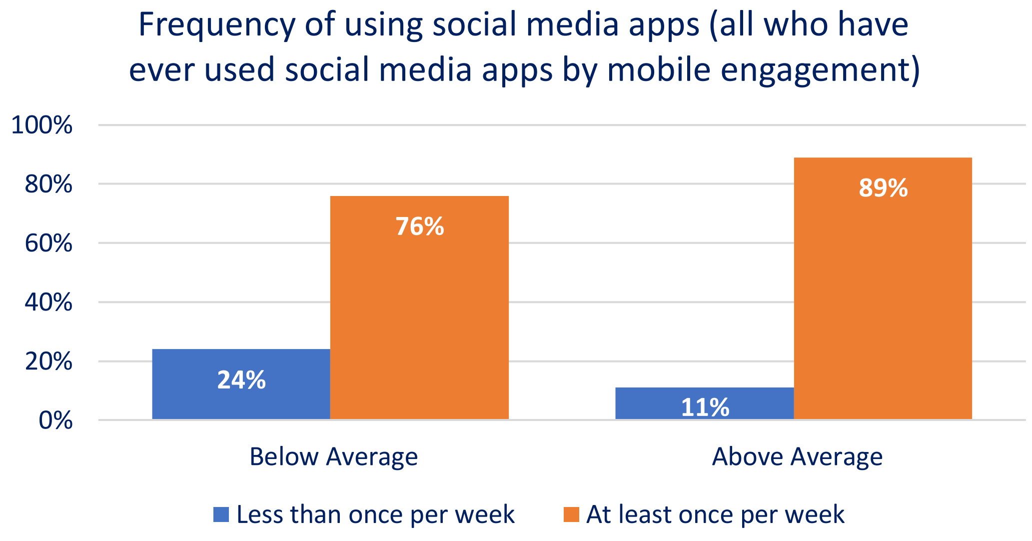
Social media apps are more regularly used by female smartphone users, with 86% of those who have ever used using social media doing so at least weekly compared to 83% of male users. Social media usage is similar therefore to watching video content or playing games.

SOCIAL MEDIA IS MORE PREVALENT WITH HIGHER AGE GROUPS



Of those who use social media on their smartphone, we find that frequency of usage rises with age group with 90% of the 55+ year old age group accessing social media at least once per week, compared to 83% of the 16 – 24-year age group.

Analysed by the level of mobile engagement, we can see a large difference. 89% of users with above average engagement access social media at least once every week, compared to 76% of those with low mobile engagement.



DRIVING CONFIDENCE AND TRUST IN APPS

IT'S ALL ABOUT GIVING USERS CONTROL AND RESPECTING PRIVACY

• 5 key points to boost confidence and trust in apps

1. **Allowing users to change, edit or delete personal data gives the biggest boost to confidence in apps**

   A clear privacy statement is also very effective

2. **Users in China are generally more likely to have their confidence in apps raised**

   Users in the UK are least likely to have confidence raised in apps

3. **Male users are more willing to trade their personal data for something**

   Female users respond better to all the other confidence raising actions by apps

4. **Respecting privacy and keeping user data safe are most effective at building trust**

   Respecting user privacy appears universally effective in building trust in apps

5. **Younger users see other trust building issues as generally less important than older users**

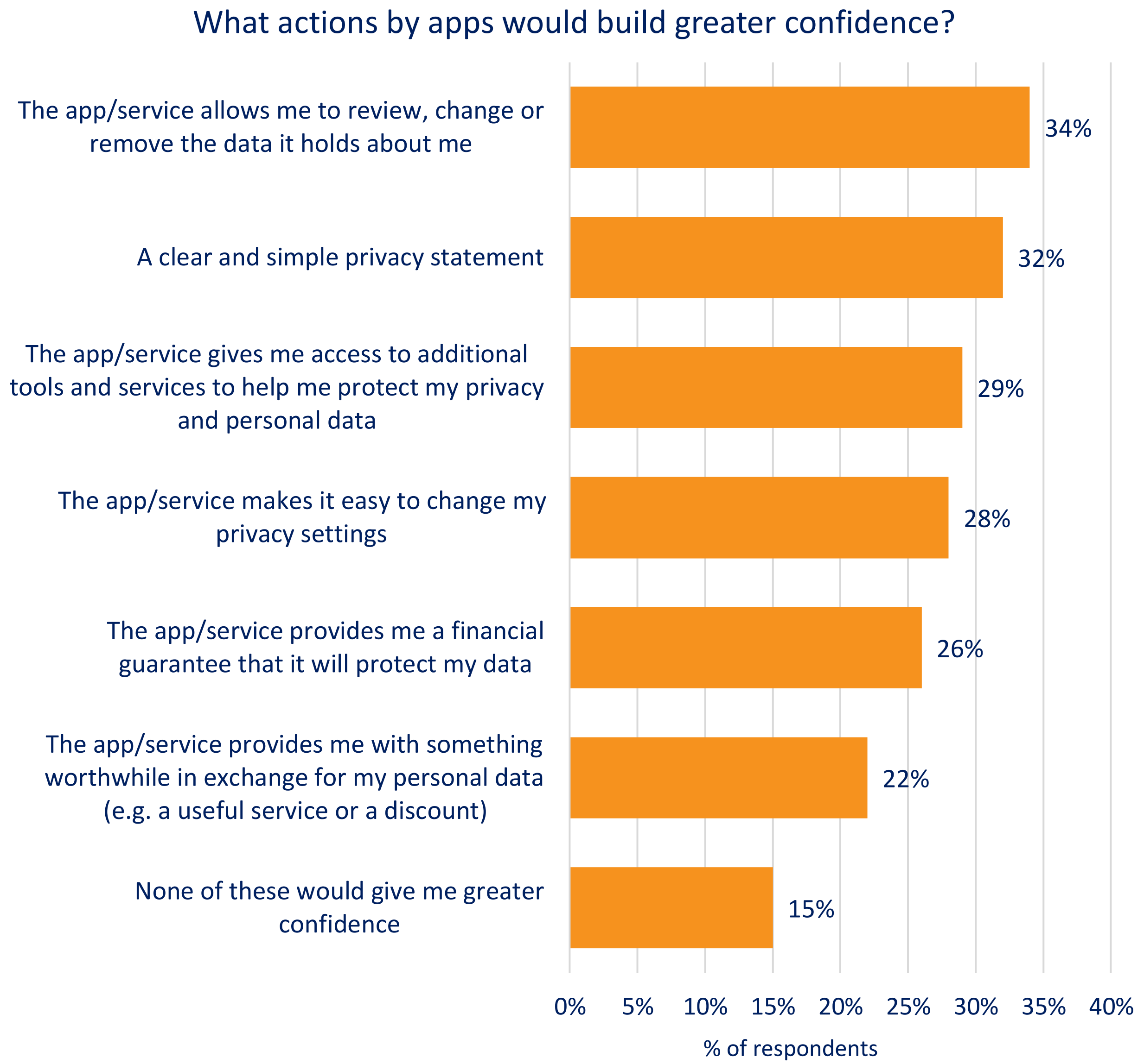
   Older users also see ease of use as a way for apps to build trust

CONFIDENCE IN THE HANDLING OF PERSONAL DATA IS DRIVEN BY APPS LETTING USERS HAVE CONTROL

Globally, apps can drive increasing confidence that they are handling personal data safely by giving users control over reviewing, changing or deleting the personal data that the app holds.

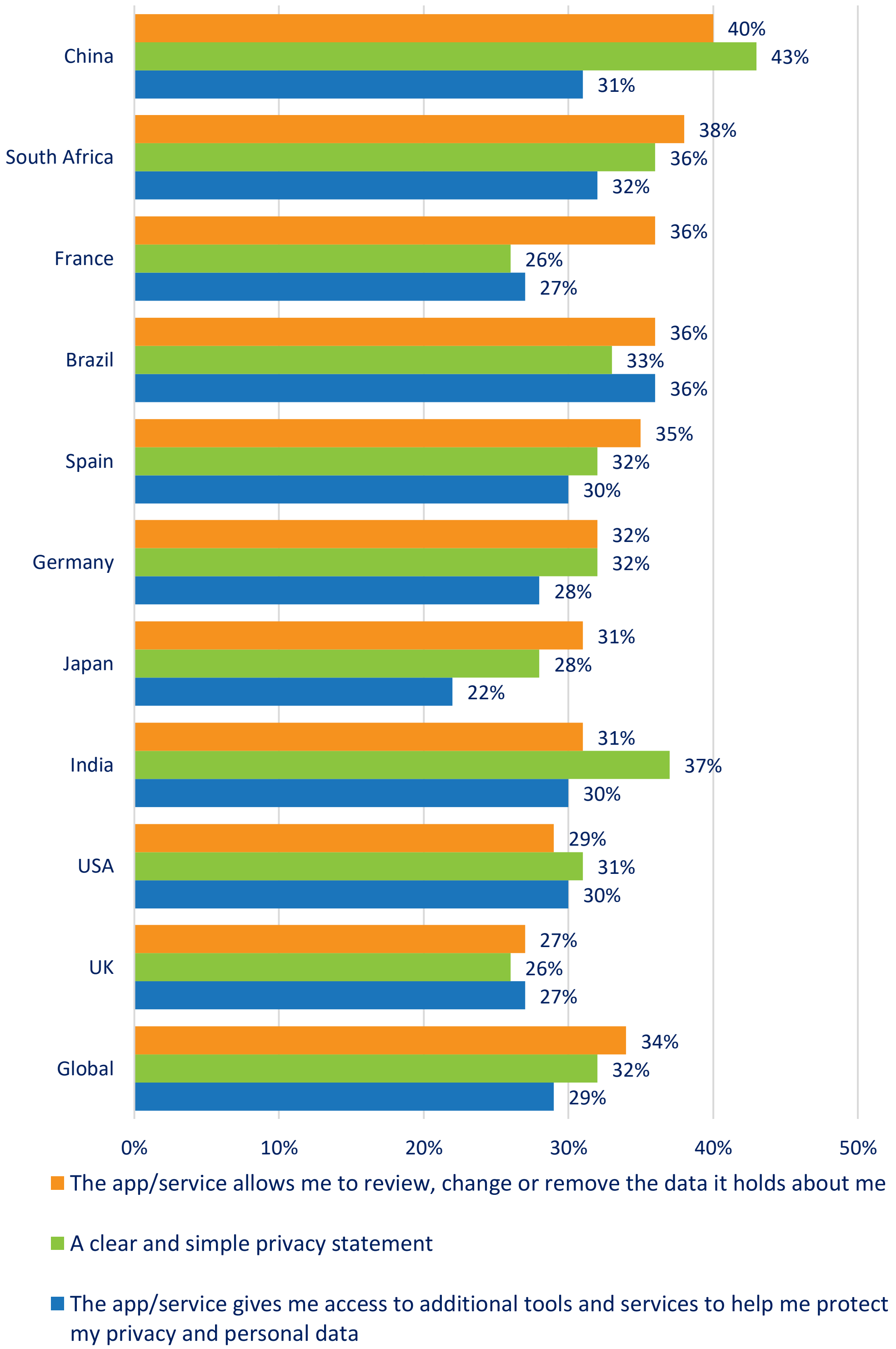
- 34% of global users felt this would build their confidence in the app.

We can also see that at the other end of the scale, 15% of global users felt that none of these actions would build confidence in apps. However, there are also clear national differences driven by specific user attitudes.



UK AND JAPAN ARE LEAST INFLUENCED BY THE TOP THREE CONFIDENCE BUILDING MEASURES

Top 3 actions by apps that would build greater confidence, by country



Although these are the top three actions that apps can take to drive confidence and usage, there are clear country differences.

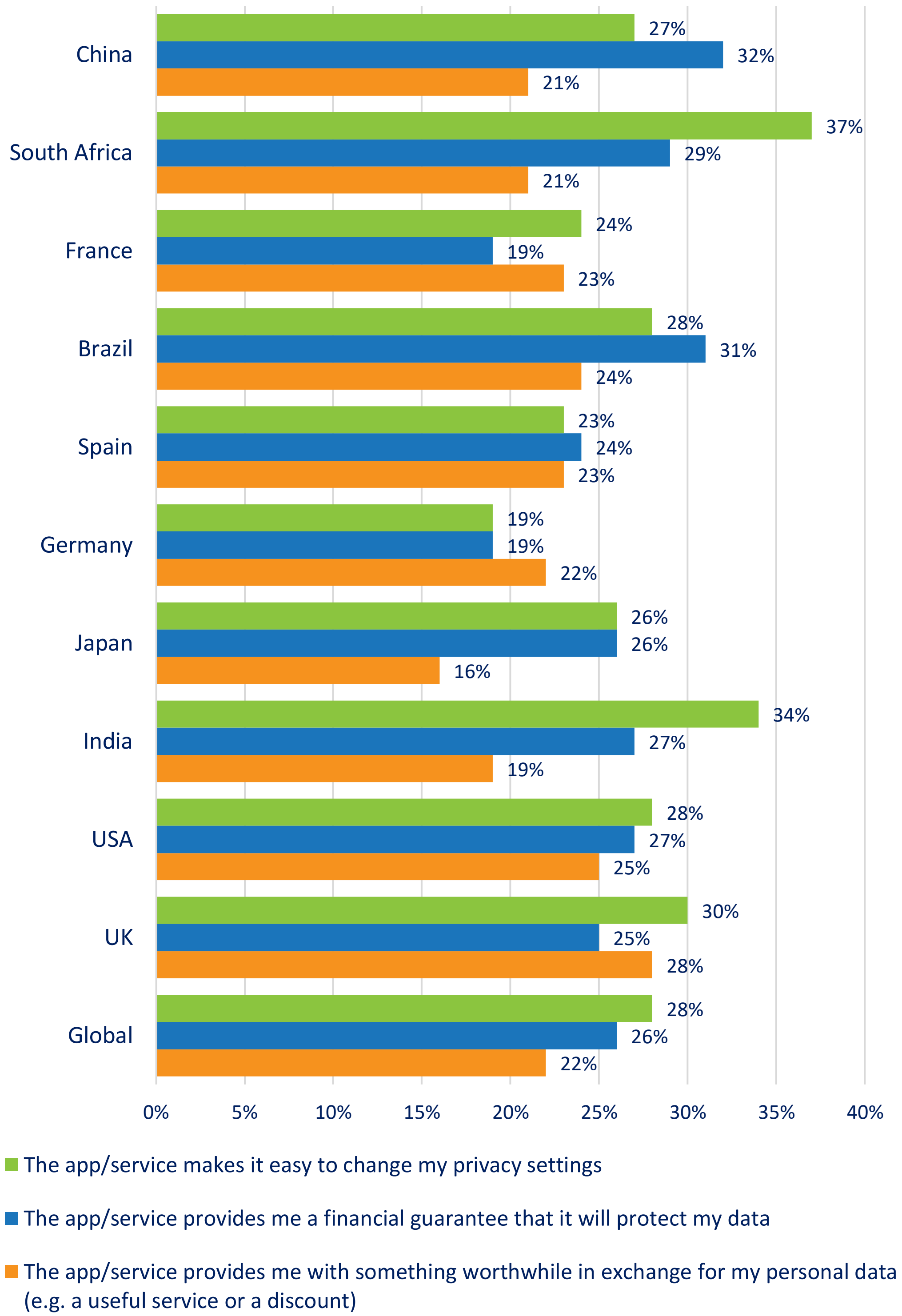
While allowing users to manage their own personal data has broadly universal appeal, we can also see that:

- A clear privacy statement has the greatest impact in China and India, while users in the UK and France are skeptical over its impact on confidence.
- Providing additional data tools has the greatest impact in Brazil, but least impact in Japan

Overall, these three actions have the least impact on confidence in the UK and Japan.

CONFIDENCE IN APPS IN SOUTH AFRICA AND INDIA IS MOST INFLUENCED BY BEING ABLE TO CHANGE PRIVACY SETTINGS

Lower 3 actions by apps that would build greater confidence, by country



Making it easy to change privacy settings has a significant impact in South Africa and India, where it is the 2nd most powerful action to drive confidence there.

Providing a free financial guarantee regarding data protection has its biggest impact on confidence in China and Brazil.

Lastly, the idea of an app offering something in exchange for personal data has the lowest impact on confidence in Japan.

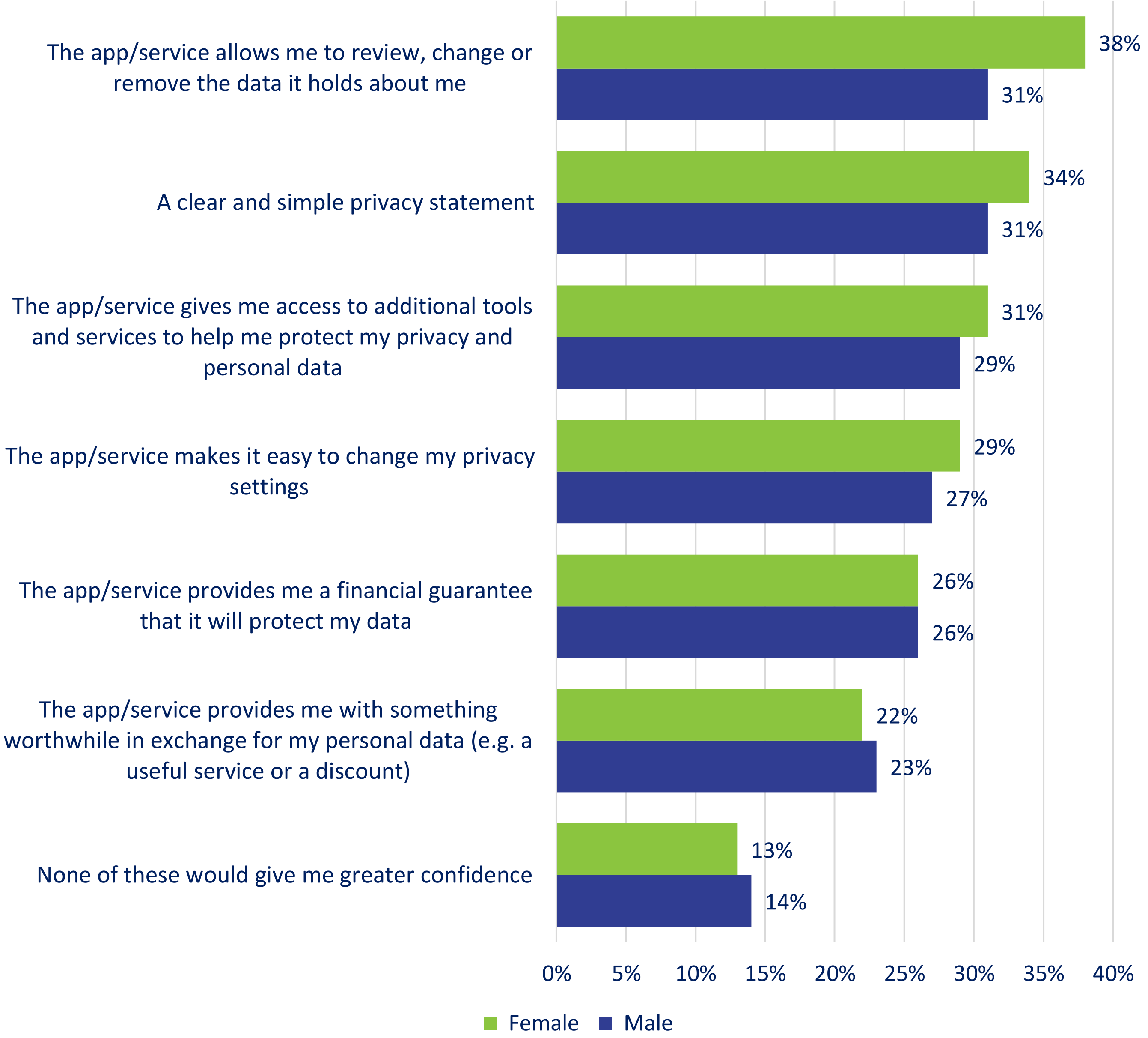
Germany, Japan and Spain are the three countries where confidence is least influenced by these app actions.

FEMALE USERS RESPOND WELL TO CONFIDENCE BUILDING ACTIONS

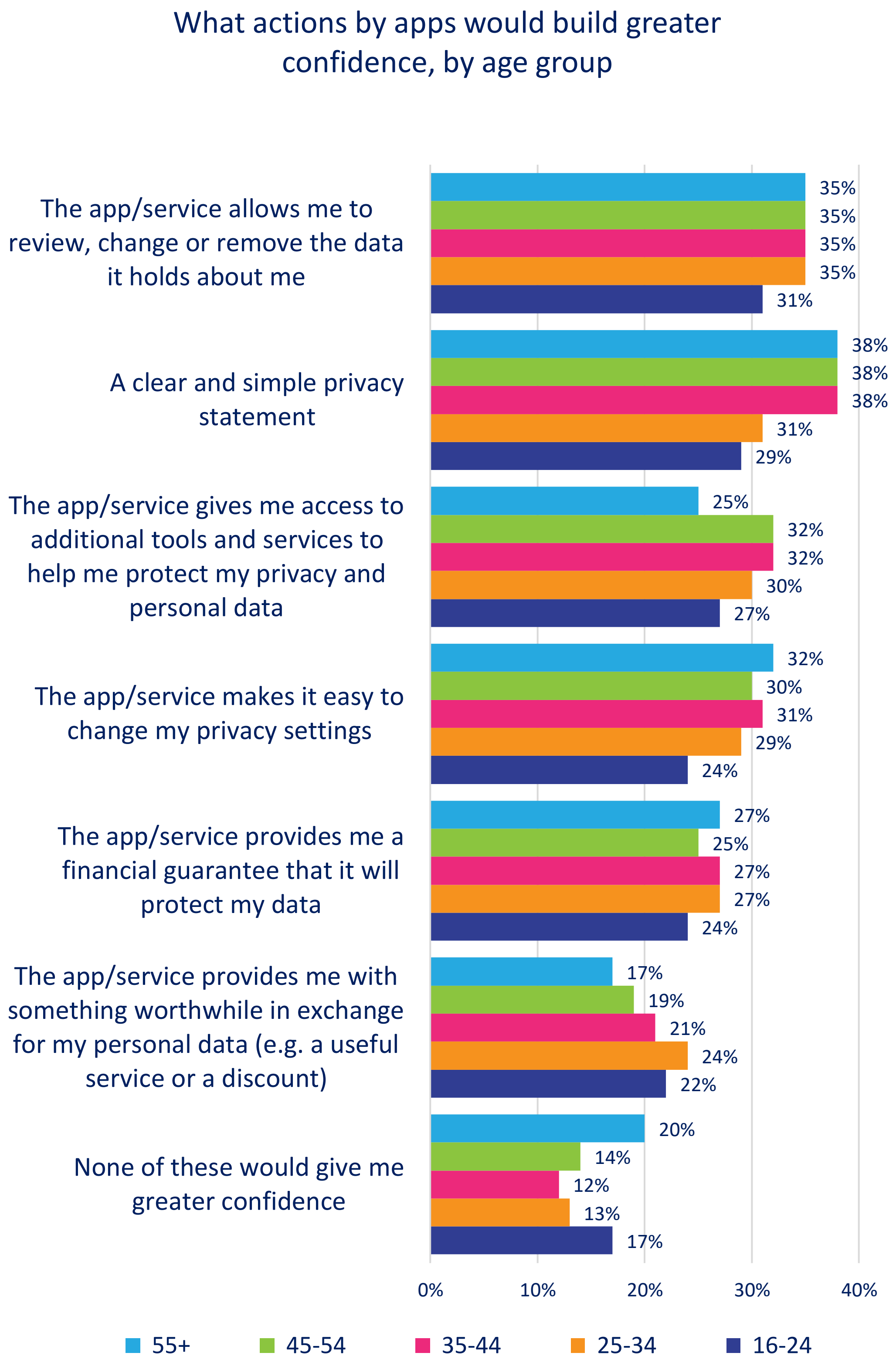
38% of female users would have more confidence in mobile apps if they were able to review, change or delete personal data. This compared to 31% of male users.

The only action that results in more male than female users having more confidence in mobile apps is where the app offers something in exchange for the user's personal data.

What actions by apps would build greater confidence, by gender



IT IS HARDER TO BUILD CONFIDENCE IN MOBILE APPS AMONGST YOUNGEST, AND OLDEST, USERS



Despite responding well to certain actions, 20% of the 55 year age group don't feel any of these actions are effective. Both the younger age band (16 – 24 yrs) and older age band (55+ yrs) are generally less influenced by confidence building measures.

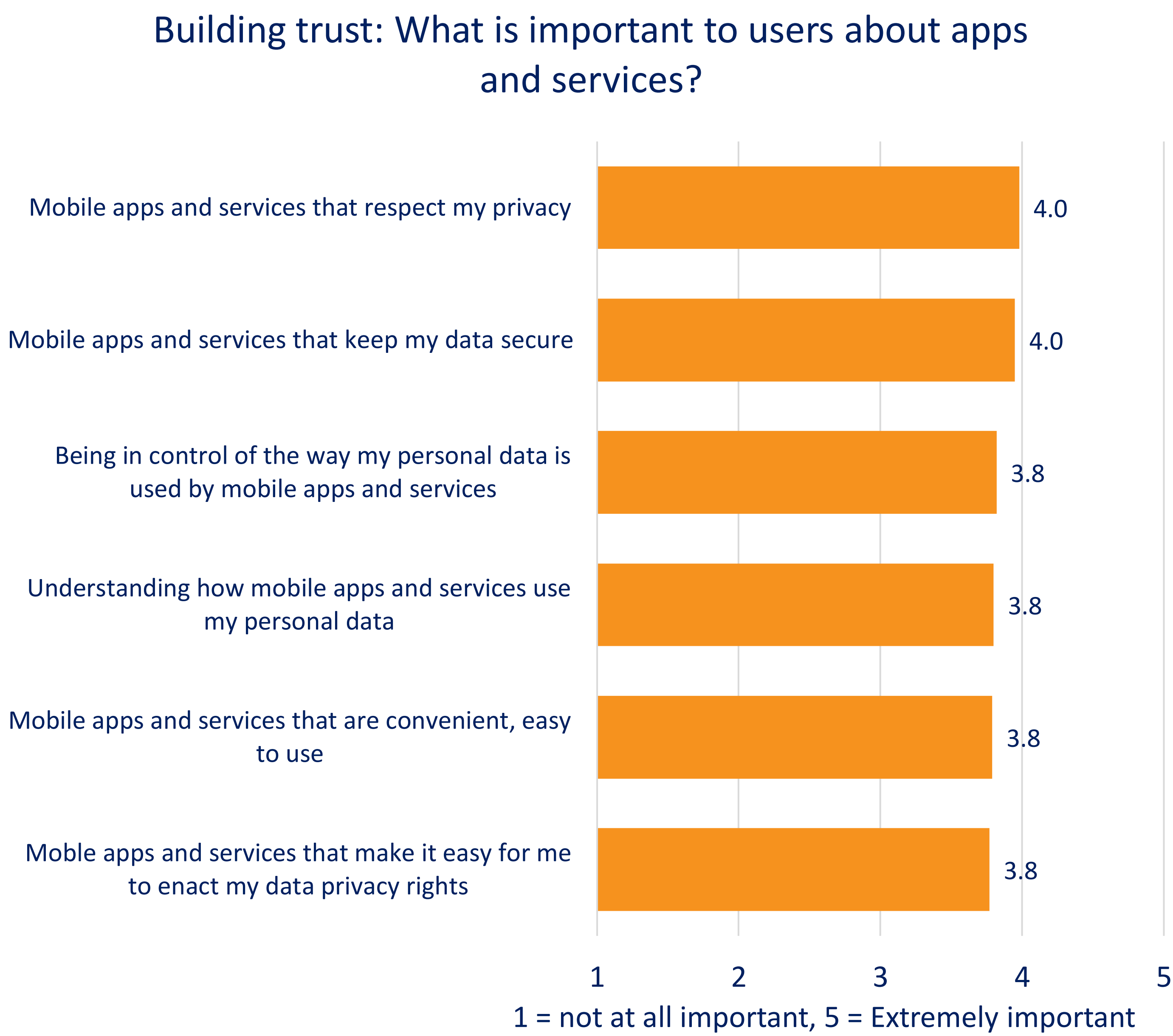
A simple privacy statement has broadly universal impact, along with the ability to change, edit or delete personal data.

But an app offering something in exchange for personal data has most impact with younger age groups

APPS CAN BUILD TRUST WITH USERS

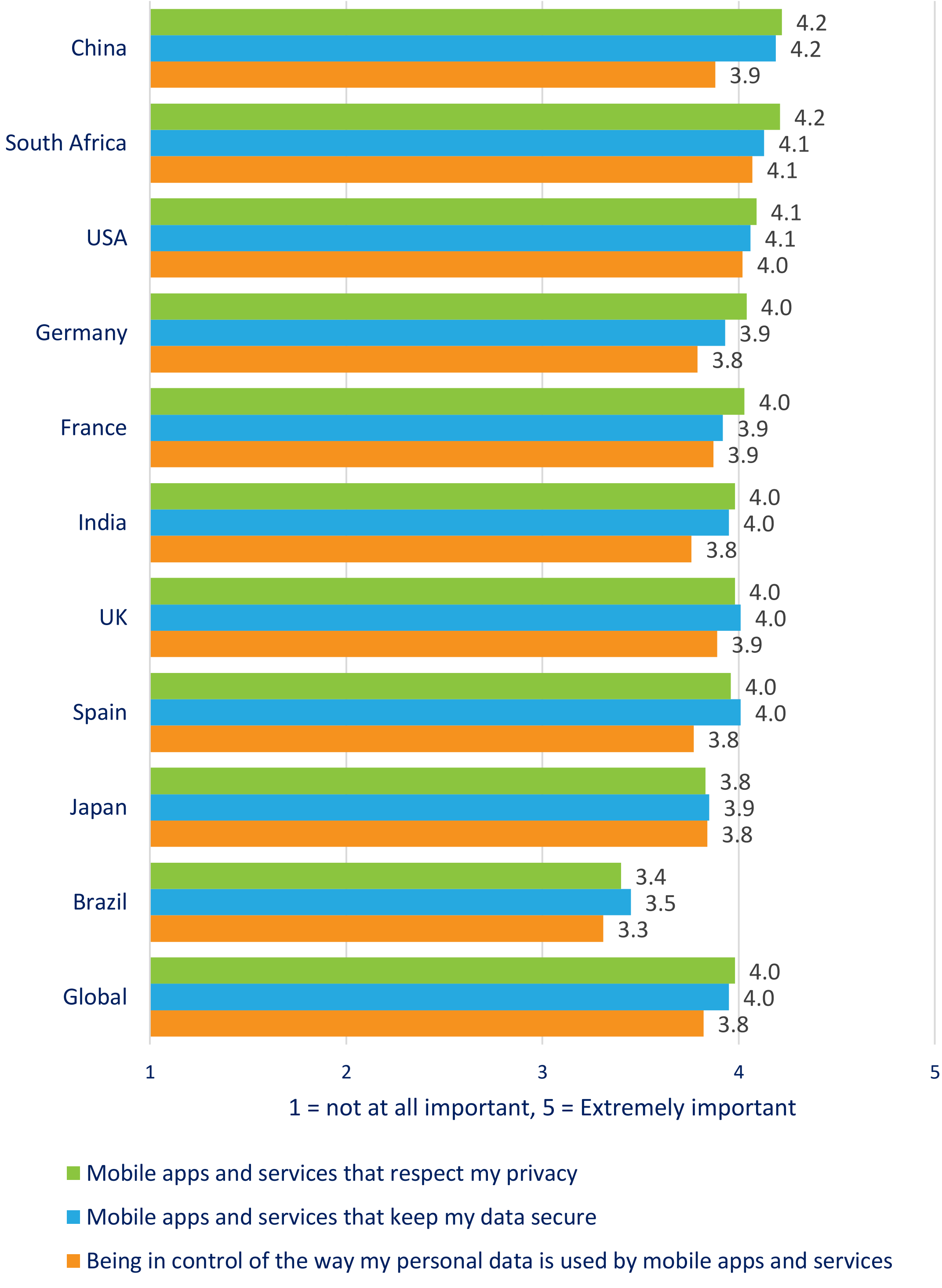
Apps can help build trust with users. At a global level, all six attributes have a similar positive impact on trust. The most effective are:

- Respecting user privacy.
- Keeping personal data secure.



APPS RESPECTING PRIVACY IS IMPORTANT IN NEARLY ALL COUNTRIES

What is important to users about apps and services, by country (top 3 issues)

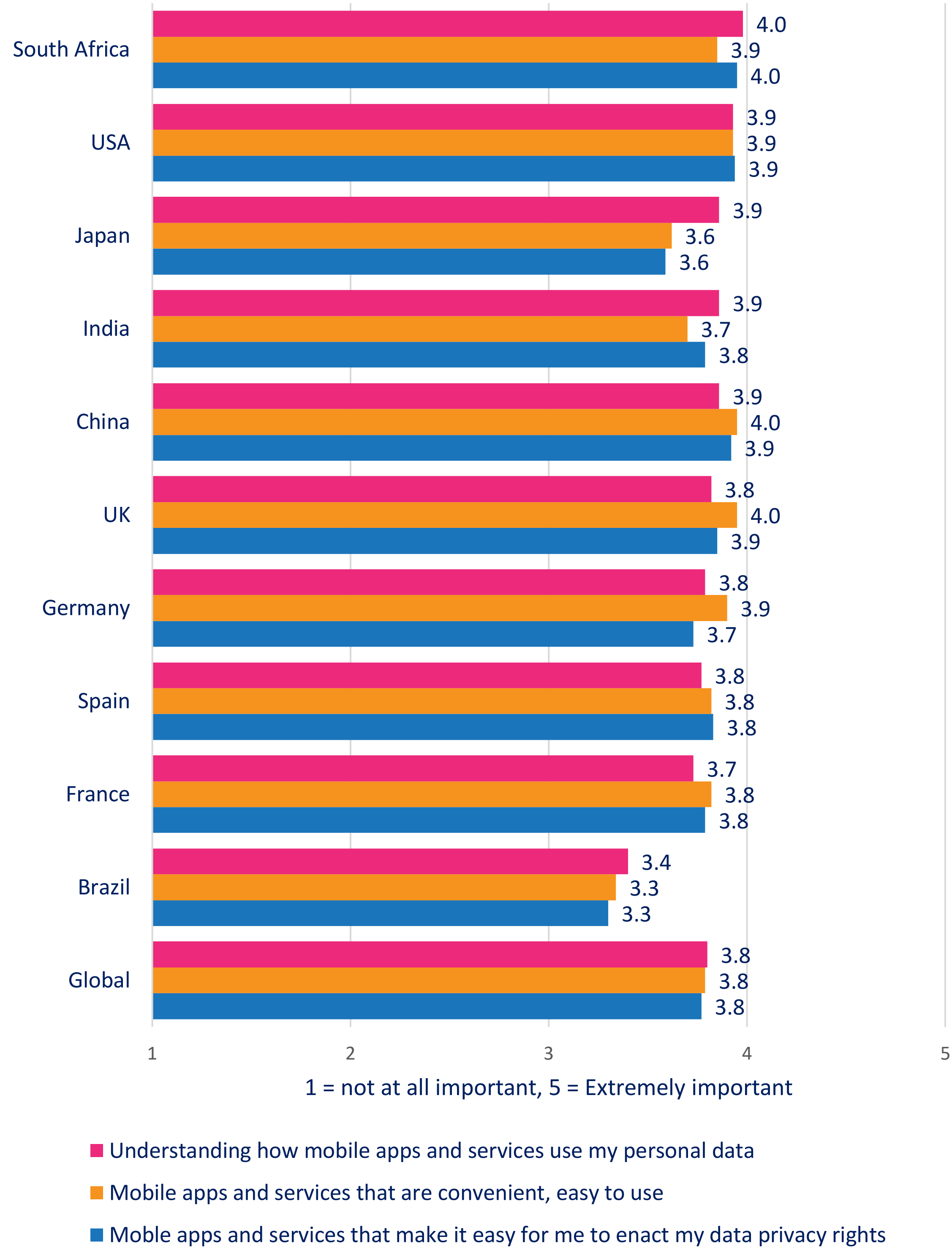


For the top 3 issues, users in China and South Africa see these as most important though users in most countries do see issues that build trust in apps as quite important.

Brazil differs in that users see these trust building issues as less important than any other country.

UNDERSTANDING HOW APPS USE PERSONAL DATA IS KEY TO BUILDING TRUST

What is important to users about apps and services, by country (next 3 issues)



For these next three trust building issues, there is again broad consistency between countries.

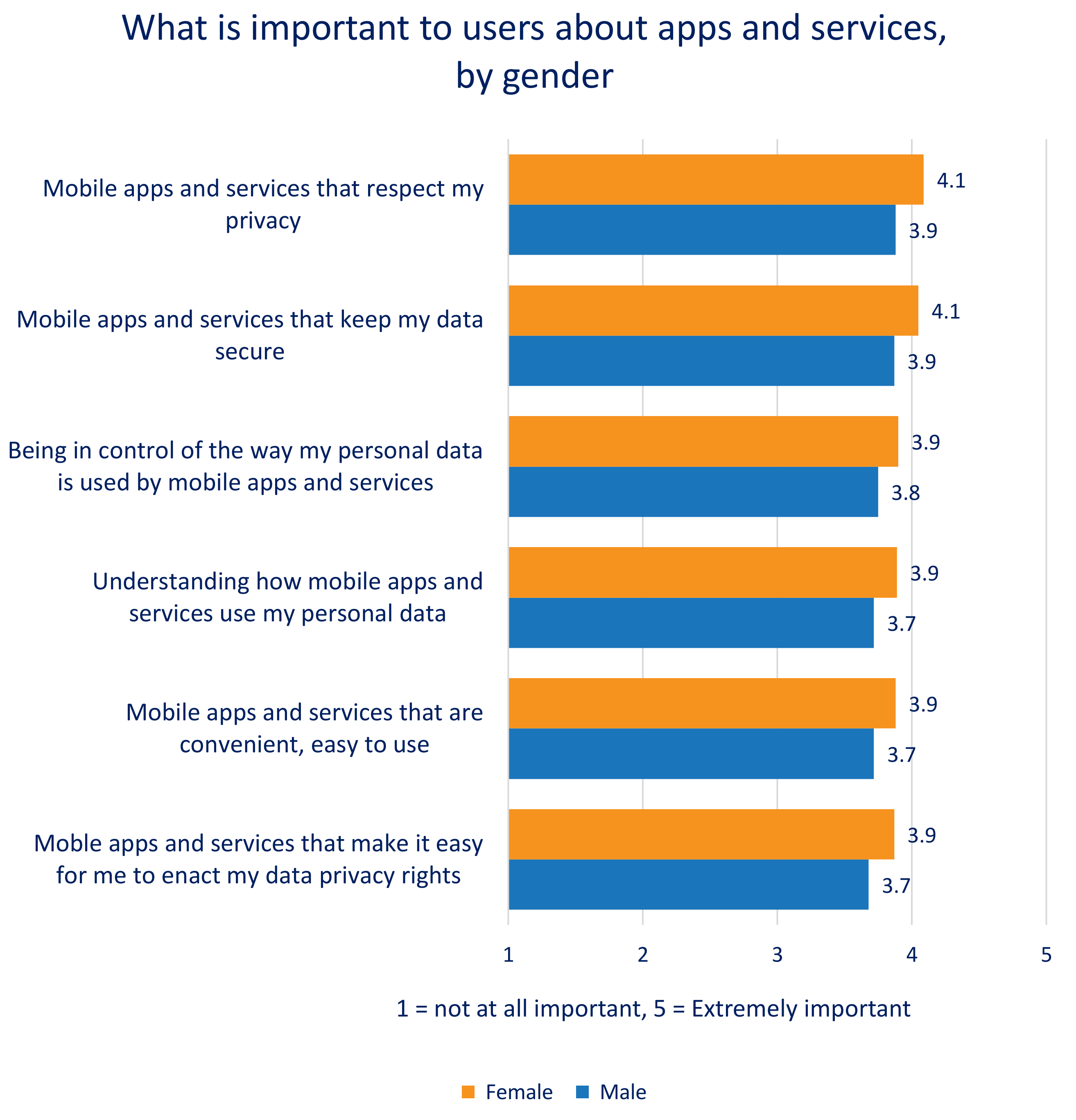
How apps use personal data is most important to users in South Africa, but is also quite important in most countries.

However, there is a little more variability in the importance of ease of use as a driver of trust.

FEMALE USERS GENERALLY SEE TRUST BUILDING ISSUES AS SLIGHTLY MORE IMPORTANT THAN MALE USERS.

Across all these issues, female users are more sensitive to trust building than male users.

We can see that both male and female users follow the global trend quite closely.



METHODOLOGY AND ACKNOWLEDGEMENTS

MOBILE APPS USAGE : SURVEY METHODOLOGY

The Mobile Apps 2021 report is based on a comprehensive online survey of 6500 smartphone users

10 countries, 650 respondents per country

Sample segmented by age band, gender, mobile platform and hardware manufacturer

Calculated segmentations including low and high mobile engagement

ABOUT THE STUDY

MEF's 7th Annual Smartphone Study was carried out in November and December 2020 . On behalf of MEF, *On Device Research* surveyed 6,500 smartphone users, 650 in each of 10 markets .

This year the question sets were simplified and some questions added regarding the impact of COVID-19.

Acknowledgements

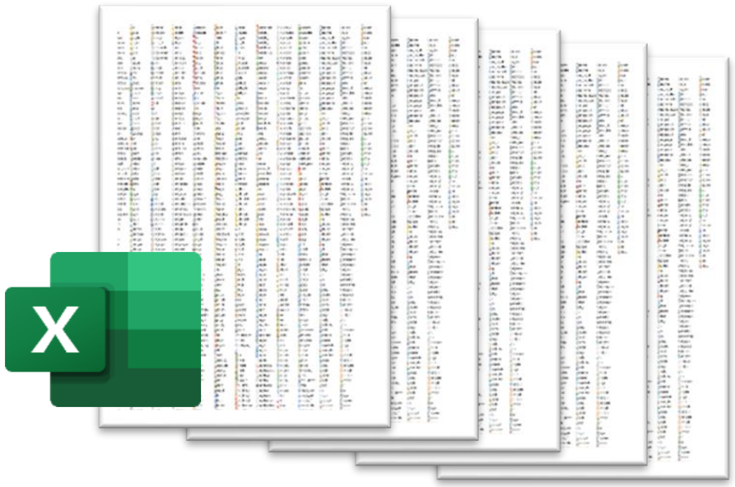
We'd like to thank the following contributors to this study:

MEF - Dario Betti, James Williams, Susan Finlayson-Sitch and Dhoni Ibrahim.

Consultant: Phil Todd, Stereoscope.

MORE FOR MEF MEMBERS

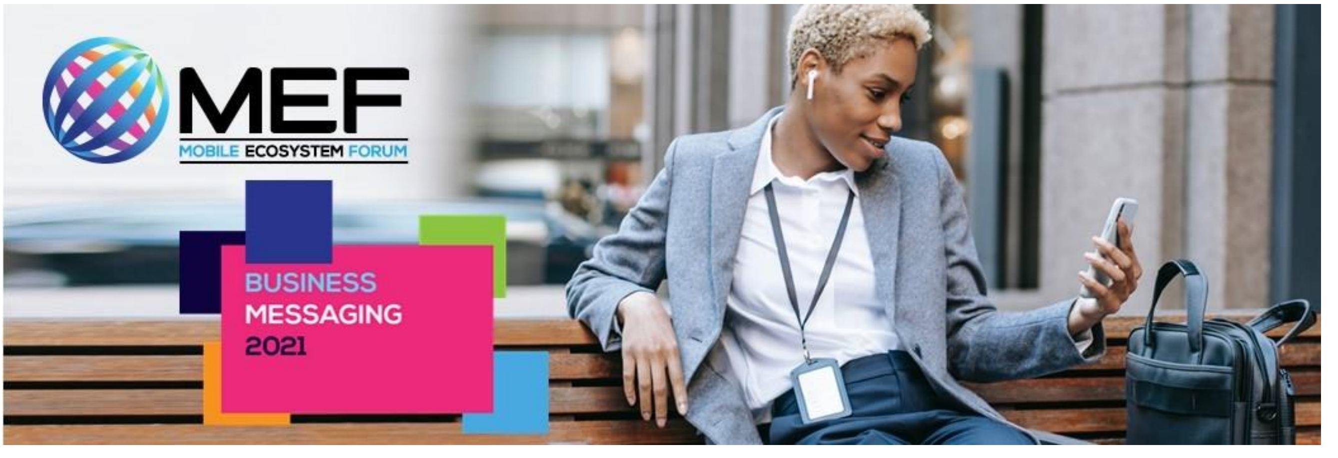
Full survey data sets are available for downloading



Visit:

MOBILEECOSYSTEMFORUM.COM

OTHER MEF REPORTS



THE MOBILE ECOSYSTEM FORUM OFFERS A RANGE OF INDUSTRY REPORTS FOR FREE, AND EXCLUSIVE REPORTS FOR ITS MEMBERS

VIST MEF AT https://mobileecosystemforum.com/reports/ FOR A FULL LIST

MOBILEECOSYSTEMFORUM.COM

Disclaimer

Mobile Ecosystem Forum Ltd. makes no representation, warranty or undertaking with respect to and does not accept any responsibility for, and hereby disclaims liability for the accuracy, completeness or timeliness of the information provided.