

## ***Consumer Intelligence Series***

Mobile advertising:  
What do consumers want?  
Cross-country comparison

*Through PwC's ongoing Consumer Intelligence Series, we gain directional insights on consumer attitudes and behaviors in the rapidly changing media and technology landscape.*



## Series overview and study objectives

As data usage on smartphones continues to outpace voice usage, mobile phones and tablets continue to find new ways to integrate into users' lives. They are one of the few devices that have entered the "inner circle of trust". As such, these devices are a treasure trove for marketers as they contain thousands of data points for advertisers including everything from your locations, likes, thoughts, and more. Apps and even the mobile platforms themselves are collecting huge amounts of customer preference data. Mobile devices are also a strong advertisement delivery mechanism as they enable marketers to send a targeted ad directly to an individual, versus broadcasting to the masses, which may or may not increase the ad's relevancy and efficacy. Many consumers expect advertisers to not only provide relevant ads, but also ones that meet demands around nature and frequency so that they are delivered at the right time of day on the right day(s) of the week, and preferably with a coupon delivered over a banner ad. To get this right, there are many hurdles for advertisers to jump. Advertising on mobile devices is still a new frontier, but given the unique capabilities that mobile advertising can provide, marketers and advertisers must quickly learn how to best take advantage of the medium within the boundaries of consumers' willingness and attitudes towards receiving mobile ads.

Through PwC's ongoing *Consumer Intelligence Series*, we gain directional insights on consumer attitudes and behaviors in the rapidly changing media and technology landscape. This report summarizes key



findings from a four-country (Brazil, China, United Kingdom, and United States) global survey among 3,800 respondents conducted in October-November, 2013, exploring the topic of consumer attitudes and behavior relative to "Mobile Advertising." Specific objectives of this research were to understand and explore target desires and attitudes toward:

- reasons behind consumer's current attitudes and behavior relative to advertising received on their mobile devices,
- critical factors of influence for decision to click or not click on a mobile ad,
- connection between ad relevance and mobile advertising interest/engagement,
- willingness to share personal information relative to cost/frequency of ads,
- preference drivers for coupon and banner ads, and
- attitudes around ad-targeting and tracking.

# Survey demographics

3,800 respondents participated in this survey



Brazil

**Percentage of respondents:**

61%: Male  
39%: Female

**Age range:**

25%: 18–24  
38%: 25–34  
28%: 35–49  
7%: 50–59  
2%: 60+



China

**Percentage of respondents:**

52%: Male  
48%: Female

**Age range:**

20%: 18–24  
35%: 25–34  
35%: 35–49  
20%: 50–59  
0%: 60+



United Kingdom

**Percentage of respondents:**

60%: Male  
40%: Female

**Age range:**

10%: 18–24  
25%: 25–34  
40%: 35–49  
20%: 50–59  
5%: 60+



United States

**Percentage of respondents:**

40%: Male  
60%: Female

**Age range:**

11%: 18–24  
34%: 25–34  
35%: 35–49  
15%: 50–59  
5%: 60+

## Mobile device summary

- ◆ For smart phones and tablets, Apple dominates in the more well-developed countries (UK and US) for both smartphone (skewing to younger age demos 18–34) and tablet ownership, while Android has higher incidences in the developing countries (China and Brazil).
- ◆ Windows device incidence is significantly lower in all four countries, although Brazil has the highest smartphone incidence and China the highest tablet incidence.
- ◆ Blackberry device incidence is significantly lower in all four countries, with the UK having the highest smartphone incidence and tablet incidence across all territories is virtually non-existent.

Brazil	
Smartphone	Tablet
24% Apple	35% Apple
56% Google/Android (driven by 25–49: 58%)	51% Google/Android
12% Windows	9% Windows
2% Blackberry	4% Don't Know; 1% Blackberry
China	
Smartphone	Tablet
28% Apple	26% Apple
65% Google/Android (driven by 18–24: 71%)	50% Google/Android
4% Windows	11% Windows
1% Blackberry	10% Don't Know; 2% Other; 1% Blackberry
United Kingdom	
Smartphone	Tablet
54% Apple (driven by 18–34's: 60%)	68% Apple
34% Google/Android (skew to 50+: 41%)	25% Google/Android
7% Blackberry	4% Don't know
4% Windows	2% Other; 1% Windows; 1% Blackberry
United States	
Smartphone	Tablet
57% Apple (driven by 18–24's: 71%)	60% Apple
39% Google/Android (skew to 50+: 44%)	31% Google/Android (skew to 50+: 38%)
2% Windows	4% Don't know
1% Blackberry	3% Other; 2% Windows

# Key findings

## 1. What activities are consumers engaging in on their mobile devices—at least once per week or more? Plenty!

Activity	Brazil	China	United Kingdom	United States
Checked news, weather & sports	87%	95%	95%	97%
Used app to find location	81%	81%	74%	87%
Accessed social network (e.g. Facebook)	95%	88%	79%	87%
Played a game	90%	86%	66%	77%
Used a GPS	80%	65%	63%	73%
Accessed a video website (e.g. YouTube)	93%	80%	56%	79%
Conducted bank transaction; bill pay	77%	67%	67%	67%
Used app to access business network (e.g. LinkedIn)	77%	59%	44%	40%
Purchased merchandise from website	59%	71%	43%	32%
Download/stream TV show	68%	69%	25%	25%
Download/stream movie	73%	71%	17%	21%
Purchase movie/show tickets	51%	32%	11%	7%
Made dinner reservations	48%	37%	15%	13%
Purchased tickets to live show/sporting event	45%	22%	7%	5%
Made a hotel or flight reservation	40%	23%	10%	10%
Checked into a flight	40%	21%	10%	12%
Purchased travel (air, hotel, railway, car rental) online	38%	31%	15%	8%
Bought/sold stock	36%	35%	7%	5%
Other purchases	6%	5%	3%	2%

 Highest across countries

 Lowest across countries

- ◆ Overall, Brazil and China have fully integrated mobile activities into their daily lives to a greater degree relative to the US and UK.
- ◆ In Brazil, respondents are the most actively engaged in mobile activities across-the-board than in any other country.
  - Of nineteen activities listed (including “other”), Brazil’s population is the most heavily engaged in fifteen of them.
- ◆ In China, more respondents engage in purchasing merchandise from a website and downloading/streaming TV shows (practically tied with Brazil) than in any other country.
- ◆ In the US, more respondents are engaged in using an app to find a location and checking news/weather/sports than in any other country.
- ◆ Of all mobile activities, checking news/weather/sports is the most highly engaged-in activity across all countries except Brazil, where more people are accessing a social network than engaging in any other activity.
- ◆ Of all activities listed, (not including “other”), the US and the UK tie for least incidence across countries for seven mobile activities, with the greatest disparity existing between the UK and Brazil (56% difference) in downloading/streaming a movie.
  - While app-related activities seem to be highly engaging across all countries (e.g. games, weather, geo-location, social/business networks, etc.), Brazil and China far outpace US and UK in engaging in “everyday” online mobile activities such as entertainment (e.g. downloading/streaming movies/TV); making purchases or hotel/flight reservations or finance-related (e.g. buying/selling stock).
  - It’s probably a good assumption that Brazilian and Chinese consumers spend more time on/interacting with their mobile devices.

## 2. Mobile app behavior: How are consumers engaging with mobile apps?

Number of apps downloaded	Brazil	China	United Kingdom	United States
In the past year	35.6	41.7	23.4	20.0
In the past six months	20.1	23.7	11.9	11.0
In the past three months	9.9	12.0	5.9	7
Intend to download in the next 1–2 months	16.3	11.8	6.9	11.8
	All skew 18–24	All skew 25–34	Skew 25–34	All skew 18–24

- ◆ Of the four countries surveyed, China downloads the most apps in a given year and the US downloads the fewest.
- ◆ However, Brazil intends to download the most apps over the next 1–2 months and the UK intends to download the fewest number of apps.
- ◆ Downloading behavior is highest among the 18–34 age groups, consistent across countries.
  - In the UK, intent to download is highest among the 35–49 group, which had been among the lowest group in past year app downloading behavior.

App download behavior	Brazil	China	United Kingdom	United States
% of FREE apps downloaded in past 60 days	73	89	88	91
Willingness to pay depends on:				
Content value	67	80	72	69
Frequency of use	62	55	62	68
Differentiation in feature set from paid version	47	54	43	49
Ability to use app without seeing ads	46	34	40	38
Uniqueness	37	41	26	27
Desire to not share my usage history with 3rd parties	25	28	28	26
Preference to support app developers	20	9	12	13
None of the above	5	6	13	15

- Highest across countries
- Lowest across countries

- ◆ When apps are downloaded—no matter the age group or country—they are most likely to be free, with a skew to the US, where 91% of apps downloaded over the past 60 days were not paid for.
  - ~ “I just don’t see any reason to pay for apps, for the most part, when there’s a half million apps out there and the majority of them are free for me to get.” (US Consumer Focus Groups/NY; Age 21–35)
- ◆ Of all countries, more Brazilian respondents (27%) download pay apps than in any other country.
- ◆ Across countries, the amount consumers are willing to pay depends most often on “**Content value**” and “**Frequency of downloads.**”
  - **Chinese** consumers willingness to pay is more influenced by “differentiation of feature set from paid version” and “uniqueness” than consumers in any other country.
  - For **Brazilian** consumers, the “ability to use the app without seeing ads” and “preference to support app developers” is more influential on willingness to pay than in the other countries.
  - For **American** consumers, “frequency of use” is more influential on willingness to pay than it is in other countries.
- ◆ Interestingly, across all countries, the privacy issue (“share history with 3rd parties”) is relatively less influential on willingness to pay for apps than any of the other contingencies presented (with the exception of “preference to support app developers” and “none of the above”).

### 3. Mobile advertising: Attitudes and behavior:

There is a disparity in attitudes and behavior toward mobile advertising as well as for flexibility for disclosing personal information between the UK/US and China/Brazil. China and Brazil have much more open-minded attitudes toward mobile advertising.

Brazilians are more engaged in mobile advertising. Consumers are more willing to interact with ads than they are to ignore them or click on them accidentally.

- ◆ Relative to the US, Brazil/China consumers are much more willing to share personal information for free apps or fewer ads. UK lands somewhere in between skewing closer to the Brazil/China attitudes than to US.
  - The US is more very/extremely unwilling to share personal information than they are willing.
- ◆ Similarly, relative to the US and UK consumers, Brazil and China consumers are much more likely to click an ad if the content is personally relevant. This suggests a profound aversion to mobile advertising on the parts of Brits and Americans and an actual interest in mobile ads among Brazilians and Chinese if content is relevant.
  - Hypothetically, the UK/US aversion could be due to the sheer number of ads these consumers have to see.
  - Perhaps Brazilians and Chinese see fewer ads?

Attitudes and behavior	Brazil	China	United Kingdom	United States
<b>Willingness to share personal information:</b>				
To get free app (extremely/very/somewhat)	68	58	28	30
To get fewer ads (extremely/very/somewhat)	72	59	27	26
<b>Mobile ad clicks:</b>				
Likelihood to click on ad if content is more relevant	82/yes 18/no	78/yes 22/no	33/yes 67/no	29/yes 77/no
<b>Past month nature of mobile ad clicks:</b>				
Did not click on an ad	20	34	44	37
Clicked intentionally and interacted with brand	32	20	7	6
Clicked intentionally and did not interact with brand	23	20	10	9
Clicked accidentally	25	26	39	49

 Highest across countries

 Lowest across countries

- ◆ Relative to past month ad clicks, Brazil consumers are more likely to have clicked on ads and intentionally interacted with the brand than consumers of any other country.
  - Further, they are more likely to do this than to click accidentally, click and not interact or not click at all.
- ◆ For the US and UK, behavior reflects attitudes.
  - Of the four countries, more UK consumers claim to have not clicked on *any ads at all* in the past month, and intentionally clicked and interacted with brands only 7% of the time.
  - Of the four countries, nearly 50% of American consumers claim to have clicked on an ad *accidentally* (compared to only 25% of Brazil consumers) and intentionally clicked and interacted with brands only 6% of the time.

#### 4. Mobile advertising: What are the most preferred formats?

##### Mobile advertising/preferred formats—key conclusions:

- ◆ Among US mobile device owners, mobile coupons and banner ads are the two most preferred mobile advertising formats.
  - US focus group consumers explain that a coupons means they save money, and so these types of ads are the most tolerated.
  - Regarding banner ad preference, US focus groups indicate it's because they are small and out of the way and the least interruptive to whatever else they're doing on their mobile device.
  - Comparatively, Brazilian and British consumers are much less enamored with mobile coupons.
- ◆ For Brazilians, video ads are overwhelmingly most preferred (55%). This compares to UK and US where video ads are significantly lower in preference (20% and 12%, respectively).
  - In US focus groups, consumers explain that video ads are often too long, too much of a time commitment.

Mobile advertising format: % ranked first	Brazil	China	United Kingdom	United States
Mobile coupon	11	33	13	27
Banner	12	9	28	25
Video	55	36	20	12
Search	5	7	12	10
Text	6	4	11	10
Ad displayed after in-app activity	5	8	9	8
Audio	2	2	1	1
Other	3	1	7	7

##### Most preferred within country

- ◆ Among Chinese mobile device owners, video ads and mobile coupons are the two most preferred mobile advertising formats.
- ◆ And among UK mobile device owners, banner ads are the most preferred format.
- ◆ Across all countries, the least preferred mobile advertising format is an audio message. Search and text ads do not rank very highly either.

## 5. Mobile advertising: What are the most important factors?

◆ “Relevant ad content” is the most important attribute of mobile advertising across all countries.

- This is not surprising as the “rules” of mobile advertising are the same as any effective advertising—so it seems obvious that in order to promote mobile ad engagement, the content of the ads have to be inherently interesting/relevant to the viewer.
- US focus group learning also indicates that ads should not just be relevant to their interests, but relevant to what they’re doing and where they are when they are seeing the ad.
- ◆ For both US and UK, “Duration/size of ad” is a virtually tied with “Relevant ad content” as most important.
  - US focus group consumers explained that ads are more tolerated if they are of an acceptable duration (referring to video, primarily). Most respondents said that is about 15 seconds. Something like two minutes was considered “too much.”
  - Further, US consumers explained that an ad can’t cover an overwhelming proportion of the screen’s “real estate”, thus obstructing mobile activity.

Mobile advertising: Level of importance	Brazil	China	United Kingdom	United States
Relevant ad content	86	77	59	56
Get freebies	78	68	36	40
Products/services specific to my location	76	62	46	51
Duration/size of ad	74	63	58	57
Offers good for a limited time	67	64	26	23
Ad format	62	47	21	16
Personalized (uses my name)	54	35	9	5

### Highest importance factor within country

- ◆ For both Brazil and Chinese markets, “Getting freebies” is the second most important factor for mobile advertising.
  - Relatively less important to US/UK consumers since US focus group respondents offer that “freebies” are usually not free, as many require too many click-thrus and therefore too much of their time or giving up too much information.
- ◆ The biggest disparity seen across countries is the importance attributed to an ad being “Personalized/uses my name.” In fact, there is a polarity of importance rating on this attribute between Brazil/China where—it is significantly more important—and US/UK, where it is significantly less important.
  - US focus group consumers explain that while it does seem to be more the norm today, they don’t particularly like “being known by the world out there” especially relative to increasing the number of [personal] solicitations.
- ◆ There is also a great disparity between countries relative to the importance of “Ad format” and “Offers good for a limited time.” Once again Brazil and China align for both these attributes, which are considered much more important than they are to US/UK consumers.
  - For “Ad content”, as much as three times more important for Brazilians and double for Chinese (v. US/UK).
  - For “Offers good for a limited time”—at least twice as important for Brazil/China.
- ◆ Ads for “Products specific to my current location” are more important for Brazil, China and US relative to UK consumers.
  - US focus group respondents explain these types of ads are considered a “service”—something that provides helpful, relevant information to them, and so they are much more tolerant—even welcoming—of the ad.

## 6. Mobile advertising: How often do consumers want to be targeted?

◆ Once again there is clear disparity between the mobile advertising targeting frequency desired by Brazil/China consumers versus that of US/UK consumers.

- For Brazil and China, being targeted with mobile advertising on a daily basis is preferable.
- For US/UK consumers, the optimal targeting frequency for mobile advertisements is actually—not at all.
  - US focus group respondents explain that mobile ads are generally annoying and frustrating and usually interruptive and distracting to something else they are engaged in doing on their mobile device. In a perfect world, they'd rather not be bothered at all.

Preferred targeting frequency	Brazil	China	United Kingdom	United States
Hourly	9	4	0	0
Daily	44	47	10	10
Weekly	27	34	24	22
Monthly	10	8	14	12
Not at all	9	7	52	56

 Most preferred frequency of targeting within country

## 7. Mobile advertising: What's the best criteria for targeting?

- ◆ **Being targeted by interest is the #1 criteria among consumers in all four countries.** To an equal degree among US/UK consumers and to a higher degree among Brazil/China consumers.
- ◆ Being targeted by current location is the #2 criteria among consumers of Brazil, US and UK. For China, it's being targeted by their online purchase history, which is also the #3 criteria for US and UK.
- ◆ Brazil stands out with its #3 criteria being targeted by their name.
- ◆ **For respondents in all countries, the least acceptable criteria for mobile ad targeting is by accessing keywords from their texts, emails or phone calls.**
  - Numbers are significantly lower for all three of these criteria among US and UK consumers versus China and Brazil.
  - US focus group respondents explain that this is considered way too personal and too much of an invasion of privacy. Consumers don't want "big brother" knowing the content of their "private" texts and phone calls. It's "just wrong" and they feel "more violated." Push notifications were seen to be more preferable since they are "not a direct form of communication."
- ◆ Being targeted by their route to work is not very acceptable to US (5%)/UK (7%) consumers, while Brazil (19%) and China (18%) consumers have a significantly higher tolerance for this form of targeting.

Acceptable mobile advertising targeting criteria	Brazil	China	United Kingdom	United States
By interests	74	76	54	54
By online purchase history	37	50	35	25
By current location	44	40	41	44
Types of sites visited on mobile phone	28	36	20	24
Types of sites visited on PC or tablet	25	30	23	19
By previous offline purchase history	13	20	6	5
By route to work	19	18	7	5
By keywords used in your email	15	16	3	1
By keywords used your texts	15	14	1	2
By your name	41	14	9	5
By keywords used in your phone calls	12	12	1	1

■ #1 within country

■ #2-3 within country

## 8. Mobile advertising: What's the best time of day to be mobile ad-targeted?

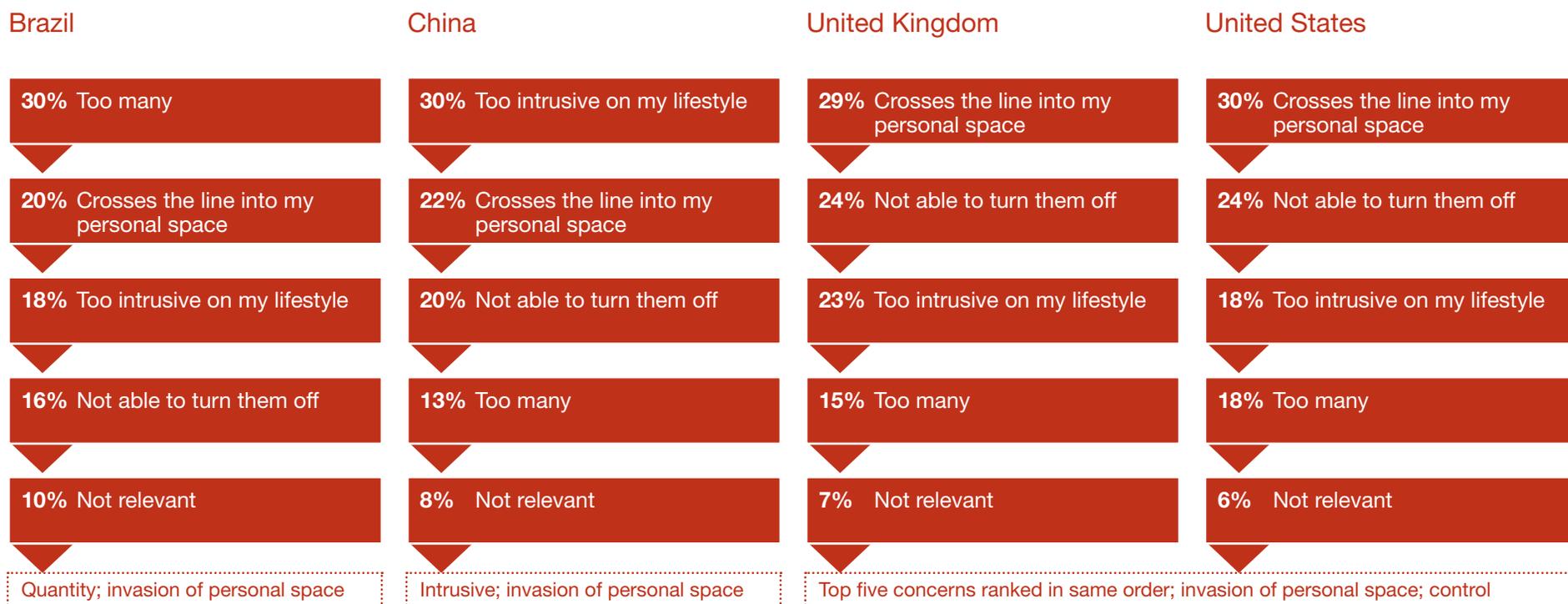
### Mobile advertising: Best time of day to be targeted—key conclusions:

- ◆ For US and UK consumers, it appears there is never an optimal time to be targeted with mobile advertising, since majority of respondents in these countries selected “none of the above.”
- ◆ Brazilians mostly prefer to look at mobile ads in the morning, when they first wake up.
- ◆ Chinese respondents mostly prefer to view ads on their way to work or over the weekend.
- ◆ The one common denominator across countries for time of day preference, is **that globally, most consumers don't want to see mobile ads:**
  - When they're out and about
  - When they're at work
  - Before they go to sleep
- ◆ US focus group respondents explained the propensity for better reception of ads during times of leisure (e.g. over the weekend) in that they have more time to look, click or ignore as the case may be. In general, advertising is simply not as bothersome to them during these times, when they have more time to take action. In fact, they are more likely to engage in rather than ignore ads seen during these times.

Best time to be targeted with mobile ads (ranked)	Brazil	China	United Kingdom	United States
Morning when I wake up	33	10	8	10
On my way to work	14	29	12	4
At work	10	8	5	8
In the evening before dinner	13	8	10	6
When I'm out & about	3	3	4	7
Before I go to sleep	6	10	2	5
Overnight when I am asleep	3	3	11	13
Over the weekend	11	24	16	16
None of the above	7	5	32	31

 Highest ranked within country

## 9. Mobile advertising: What are the biggest concerns?



◆ **Among the top two concerns in all four countries is about “invasion of personal space.”**

- ◆ For both UK and US respondents, more people are concerned with this than any other concern.
- ◆ For Chinese respondents, the largest percentage is concerned about there being simply too many mobile advertisements.
- ◆ For Brazilian respondents, the largest percentage is concerned about mobile ads being an “intrusion” on their lifestyle.

- US focus group respondents helped explain the difference between “too intrusive” and “crosses the line”, where “too intrusive on my lifestyle” is more about interrupting their daily activities, this is where mobile ads can get to be annoying and frustrating—when it interrupts something else they’re trying to do that’s important to them at the time (e.g. getting directions, playing a game).
- “Crossing the line into personal space” relates to privacy issues such as tracking texts and email messages or advertisements received as a text. That activity is described as “wrong” and consumers “feel violated” as a result.

- ◆ Interestingly, the relative order of concerns about mobile advertising among respondents in the UK and US are exactly the same. This mirrors the similarities found between these two countries throughout the survey.

## 10. Mobile advertising: What's the most appealing location-based coupon/alerts scenario?

- ◆ Survey respondents were given six scenarios to consider, each involving a location-based coupon or a mobile alert about something of interest/relevant to them.

### Location-based scenarios provided:

**Coffee shop/LTO:** You walk by a coffee shop and receive a message on your phone with a coupon for a discounted drink at that coffee shop if you buy within the next 10 minutes.

**Competitor coffee shop/LTO:** You enter a coffee shop and receive a message on your phone with a coupon for a discounted drink at a COMPETITOR'S coffee shop if you buy within the next 10 minutes.

**Soup aisle/ad for new flavor:** You are in the soup aisle of the grocery store and receive an ad on your phone suggesting you try a new flavor of Campbell's soup, as it is on sale this week.

**Michael Jordan shoe alert:** Your phone knows you're a fan of Michael Jordan. As you're walking around the mall you receive an alert for a store that sells the new Air Jordan shoes.

Location-based coupon/alert scenario (Top 2 box appeal)	Brazil	China	United Kingdom	United States
Coffee shop	80	72	59	58
Mall/Air Jordan	67	54	21	22
Milk reminder	65	58	30	24
Passing tracking alarm	64	51	19	21
Grocery store soup aisle	63	55	34	37
Competitor coffee shop	61	46	20	14

 Most appealing within country

 Least appealing within country

**Milk reminder/guidance to nearest grocery store:** You purchased milk 7 days ago. As you get ready to leave work, your phone (which receives data from your shopper's rewards card) reminds you that you are likely out of milk and provides route guidance to the nearest supermarket to your commute home. It knows your route home because it has passively tracked your daily commute.

**Passive tracking alarm:** Through passive tracking, your phone knows you leave your house for work each day at 7:30am. Sensing that it is 7:30am and the phone is still located at home on a work day, the phone plays an alarm in case you overslept. The alarm is not silenced until an ad is viewed.

- ◆ Among the six scenarios from which to choose, the “Coffee shop” scenario was most appealing across all countries. The popularity of this scenario was skewed by the 18–24 segments in each country, with the exception of Brazil, where it was skewed by 25–34's.

- ◆ Interestingly, the “Competitor coffee shop” scenario was relatively least appealing across all countries. Hypothetically, it would appear that coupons are meaningful only if they are convenient to the consumer. This presents a scenario where the consumer would have to leave where they were to go somewhere else in a given time.

# Implications

1. Globally, mobile will continue to be a highly-coveted medium of reach and targeting for advertisers. Consumers are highly engaged on their mobile devices, using them to do things that help them, are convenient for them, provide a service for them or simplify their lives in some way. **They are looking for advertising content and messaging to do the same thing.**

2. Overall, Brazil/China and US/UK are much more aligned in attitudes and behavior relative to mobile advertising. May be some economies of scale—especially in US/UK—relative to future research. **There is an opportunity to better understand the similarities between Brazil and China across measures such as culture, politics, socio-economic, entertainment and lifestyle to better understand the impact and opportunities for mobile advertising.**

**3. The most acceptable way to target consumers—across all countries—is by interests, followed by “current location.”**

This will continue to be the more effective means of mobile ad targeting. **Targeting by keywords tracked by texts, emails or phone calls is the least acceptable way to target** and will only annoy them and potentially have a negative effect on brand attitudes.

- Given the top two concerns about mobile ads across all four countries is about “invasion of personal space”, tracking keywords in texts, emails or phone calls is a perfect example of how NOT to engage consumers in mobile advertising.

4. Given Brazil and China far outpace US and UK in engaging in “everyday” online mobile activities such as entertainment (e.g. downloading/streaming movies/TV); making purchases or hotel/flight reservations or finance-related (e.g. buying/selling stock), **it’s a good assumption that Brazilian and Chinese consumers spend more time on/interacting with their mobile devices and are likely to be more receptive to advertising messages. Opportunities exist in these countries for increasing media spend allocation to mobile.**

5. Across countries, app downloading behavior is highest among the 18–34 age cohort, with China downloading more apps than any other country. **This would indicate targeting free app-based mobile advertising to this age group—especially among Chinese advertisers—would be most efficient.**

6. Given consumers don’t pay for mobile apps (Brazil downloads more paid apps than other countries), **using “free” apps as an incentive for watching advertising is not a relevant offer.**

7. The amount willing to be paid for an app has mostly to do with perceived content value (relatively more important to China respondents) and frequency of app use (relatively more important to US respondents)—this relates to how valuable the service is that’s being provided overall. This determines how big the “annoyance factor” will be in tolerating ads and whether or not it’s worth it to pay the money. **It will be important to understand how consumers in each country define and what comprises “content value” and “frequency of use.”**

8. Given China and Brazil are much more willing to share personal information for free apps or fewer ads (relative especially to the US), **there is an opportunity in these countries to use these as incentives and exchange for consumer personal data.**

9. Given that Brazil and China consumers are much more likely (vs. US and UK consumers) to click on an ad if the content is personally relevant, this suggests more of an active interest in mobile advertising and therefore more general receptivity.



**Brazil is especially more engaged in mobile advertising.** They are more willing (relative to the other countries) to interact with ads than they are to ignore them or click on them accidentally.

- There is an opportunity for Brazil advertisers to capitalize on consumers' interest and willingness to interact with mobile advertising, by allocating a greater portion of media dollars to this medium.

10. Consistent with attitudinal alignment, Brazil and China are more open to more frequent (e.g. daily) mobile-ad targeting than US/UK This is puzzling for Brazil, given their #1 concern is “too many ads.” However, **there is an opportunity to capitalize on receptivity for ad frequency in China and Brazil.**

11. Since **“getting freebies” is significantly more important to China and Brazil** consumers than to US and UK consumers, advertisers in these countries should consider “free” offers as incentive to mobile ad engagement.

**12. Using consumers' name in mobile ads is likely to be more effective in Brazil** (especially) and China than in US and UK.

**13. There is little alignment across countries relative to preferred advertising format.**

However, given Brazil's overwhelming preference for video ads combined with the importance of ad format to them, Brazilian advertisers should consider allocating more media support behind video ads.

**14. The best time of day to be targeted with mobile ads varies by country,** with US and UK consumers not being receptive to any specific time of day (given they are less receptive to mobile advertising in general). Brazil is most receptive to viewing ads “when I wake up” and China “when I am on my way to work.”

- There is an opportunity to schedule advertising during times of days when consumers claim to be most receptive to receiving mobile ad messages.

**15. Location-based coupons are appealing based on convenience.**

Given that the most appealing location-based coupon scenario (“Coffee shop”) was the same across all four countries, and driven in each country by the 18–34 age cohort, this would suggest that:

- Getting a coupon at the exact time of brand/ service interaction is most effective because it represents instant gratification and the ultimate in convenience.
- The 18–34 age group is even more receptive to instant, location-based coupons.
- But there is a limit to the appeal of money-saving coupons when it comes to convenience, since consumers in all four countries found the “Competitive coffee shop” scenario which required leaving current location to go somewhere else within a limited time, least appealing.

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***For more information on this research, the PwC Consumer Intelligence Series, or how changing consumer preferences are shaping the entertainment, media, and communications industries, please contact one of our specialists:***

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