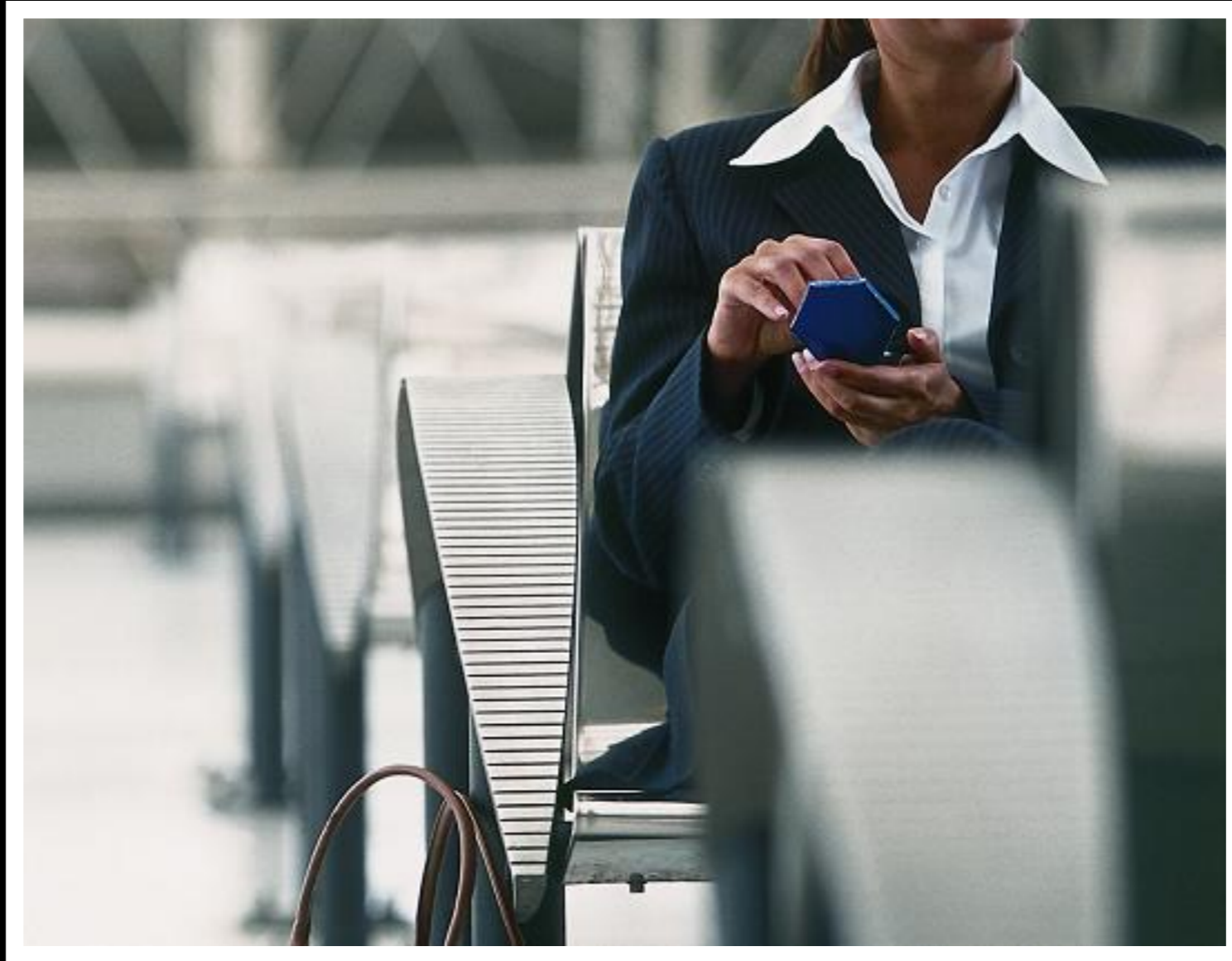


Exposure 2011



A report into how European consumers (UK, France, Spain, Poland) are engaging with mobile media and tablets.

Exposure 2011 Objectives

- Aim of the study was to reveal mobile internet and tablet device penetration as well as user habits across key European markets:
 - Discover how Europeans are using mobile and tablets to access the Internet and digital media.
 - Compare key markets to see what regional trends and differences exist.
 - Provide insight into what type of content Europeans are accessing, when and how often
 - Develop **insights** and guidelines for brands and agencies looking to use the mobile platform to reach European consumers.

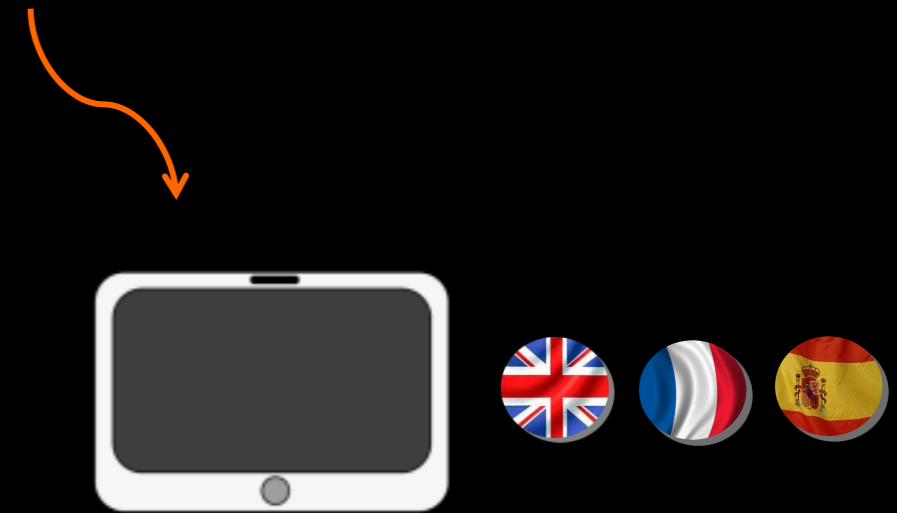


Methodology

Calibration phase on nationally representative sample of 2000, conducted face-to-face



- Main phase conducted on-line:
 - 1000 mobile media users
- Fieldwork :
 - June 2011



- Main phase conducted on-line:
 - 150 tablet media owners
- Fieldwork :
 - September 2011

What do we mean by mobile media ?

...from their mobile...

Access the Internet via free or paying applications

Communicate or interact with friends via social networks

Download music

Send & receive personal e-mails

Accessing music content on the Internet from your mobile

Access the Internet to search sites that you could search on a computer

Use streetmap, GPS or geolocalisation

Download videogames

Watch video/film/music on demand

Watch TV

Use instant messaging or chatting

Receive information associated with a particular place or product via bluetooth (i.e. when walking nearby)

What do we mean by tablet media usages?

Communicate or interact with friends via
social networks

Send & receive personal e-mails

Access the Internet via free or
paying applications

Access the Internet to
search sites that you
could search on a
computer

Download music or videogames

Send or receive pictures / videos

Access music content on
the Internet

Use streetmap, GPS or
geolocation

Use Bluetooth

Watch TV

Use instant messaging or
chatting

Watch downloaded content

Watch video/film/music
clips on demand

Watch content in
streaming

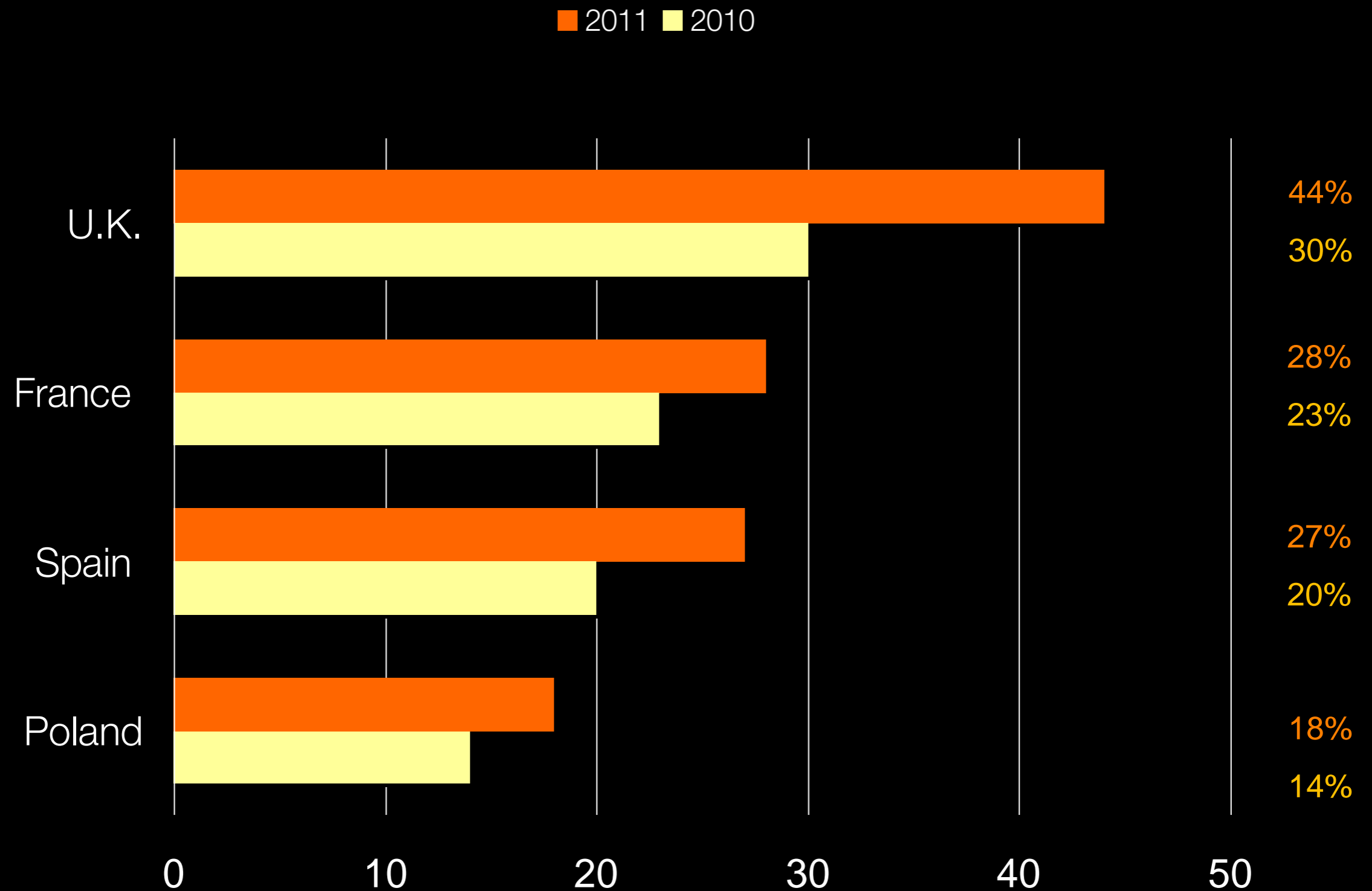
Read or download books

Read newspapers/magazines

European mobile media landscape

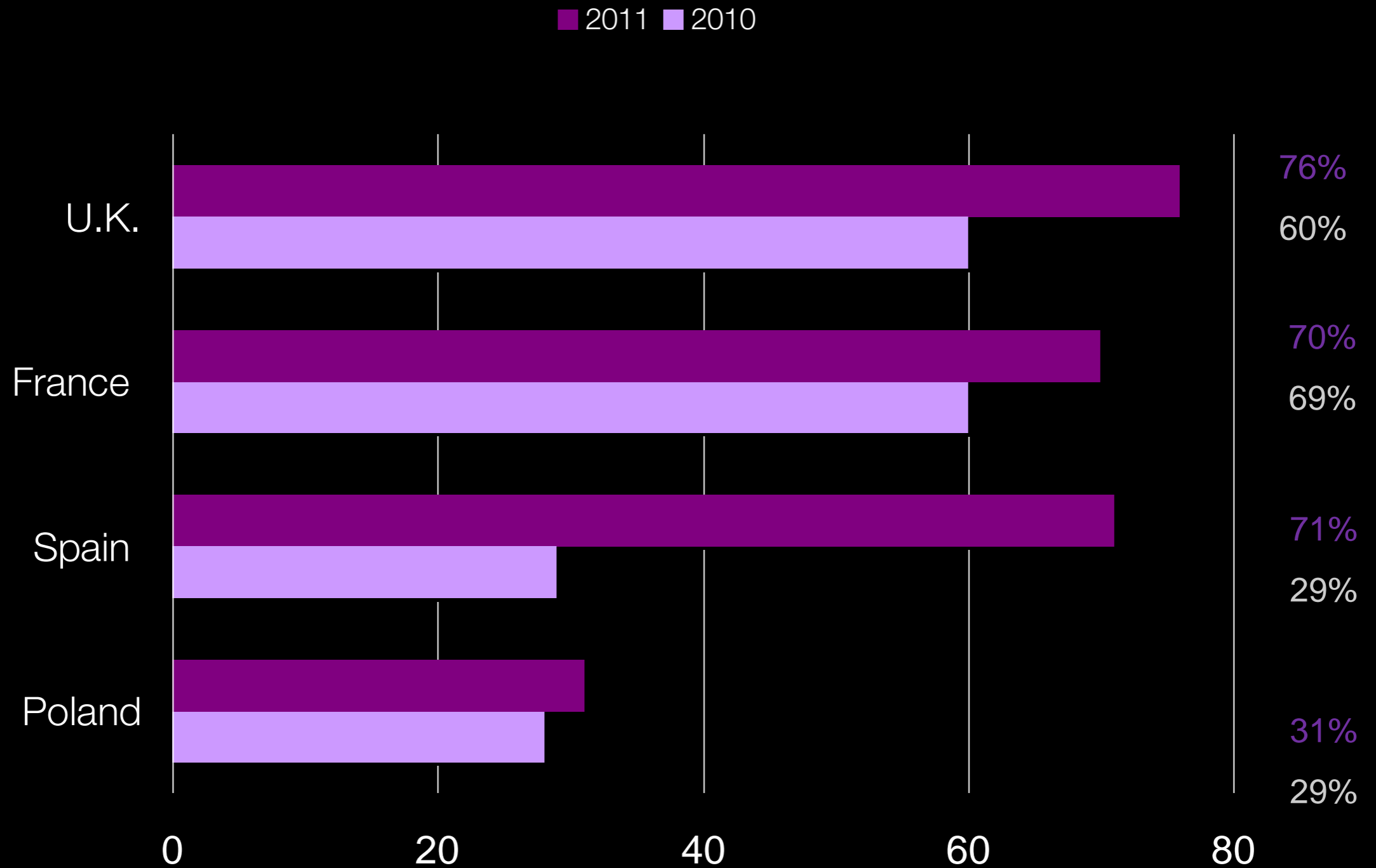


Mobile media is growing



Penetration rate for mobile media usage among mobile owners

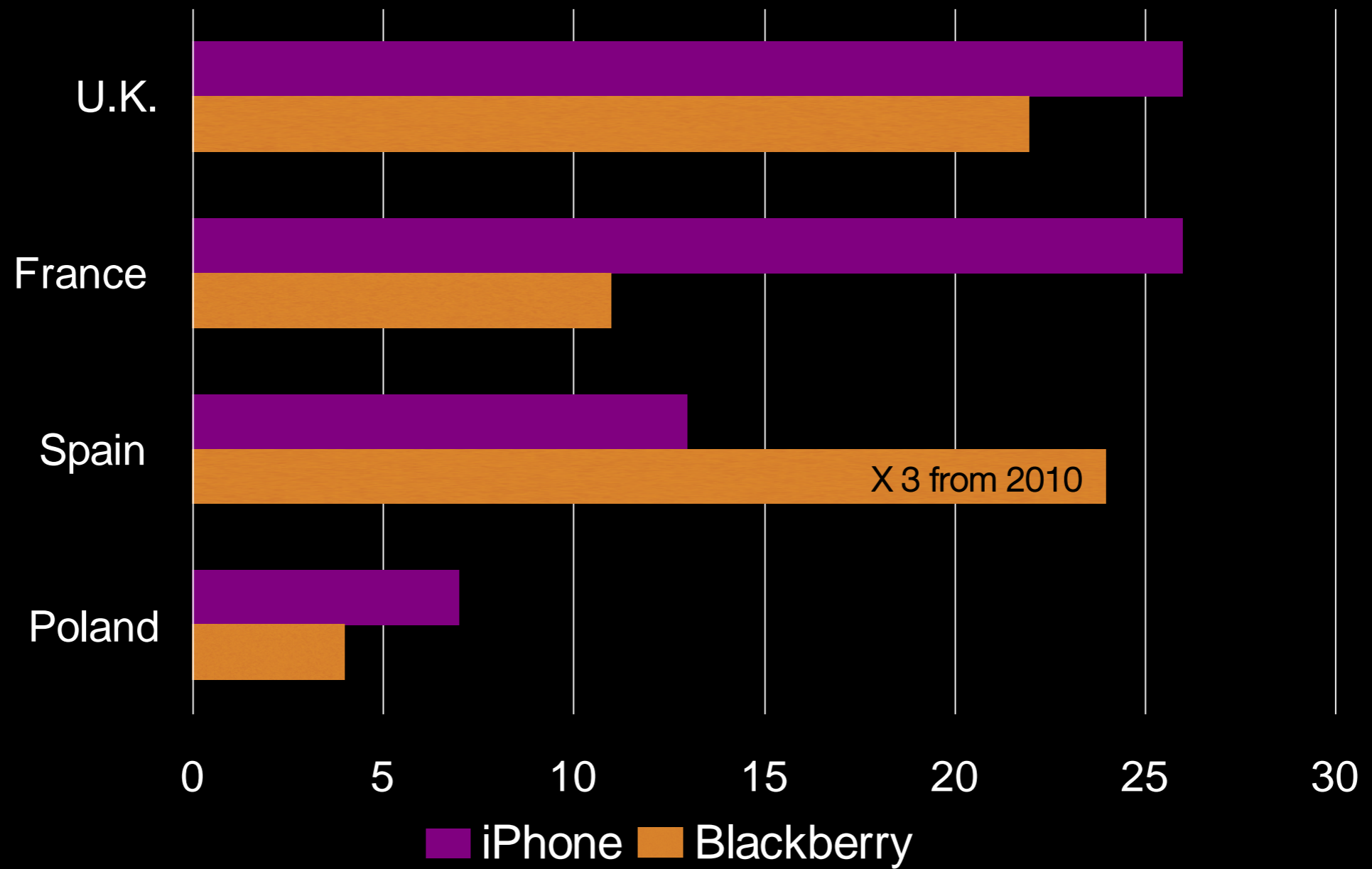
Smartphone penetration has ramped up in Spain



Penetration rate for mobile media usage among mobile population

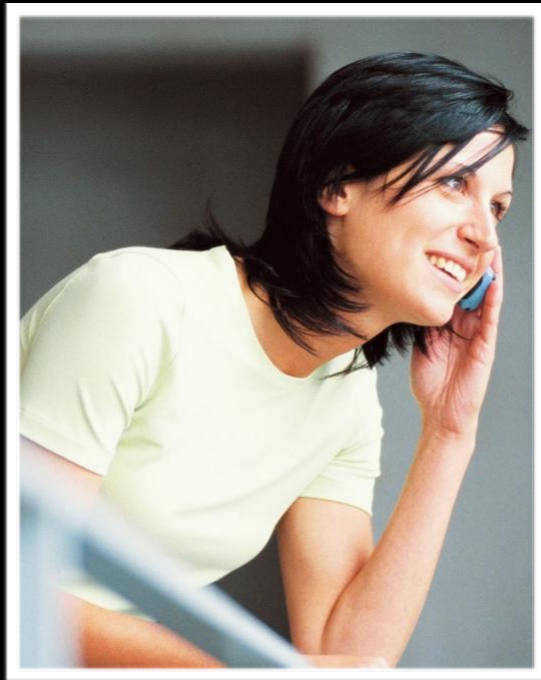
iPhone and BB make up large % of users

Smartphone ownership by brand (among mobile media users)



base: mobile media users

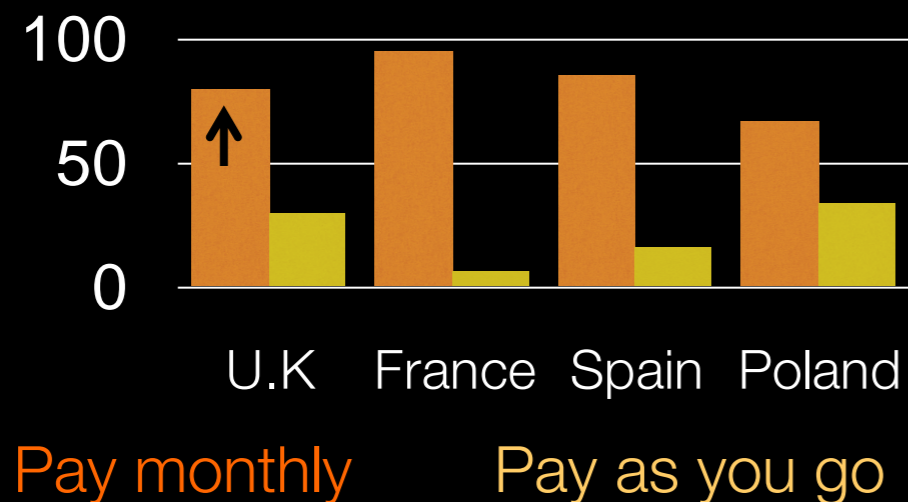
Photofit of a typical European mobile media user



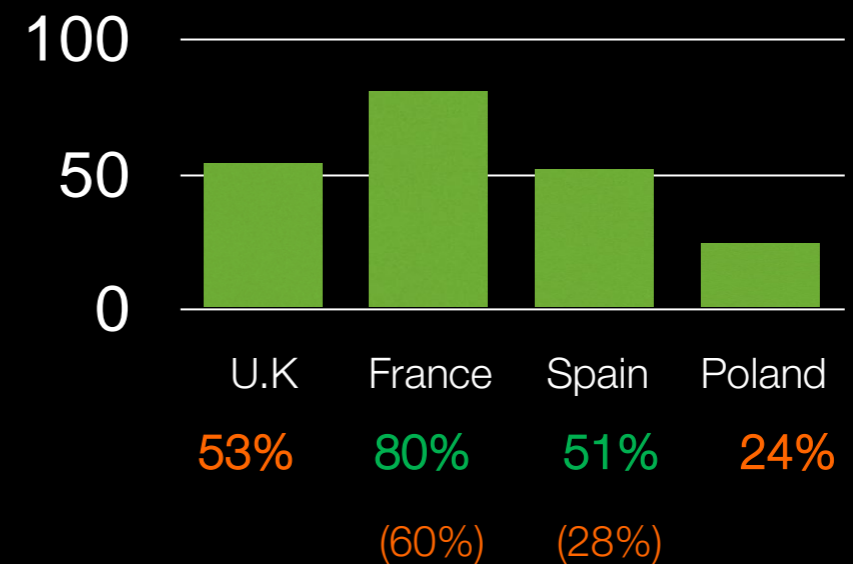
55% male
 45% female
 58% are under 35
 68% are fully employed
 16% are students



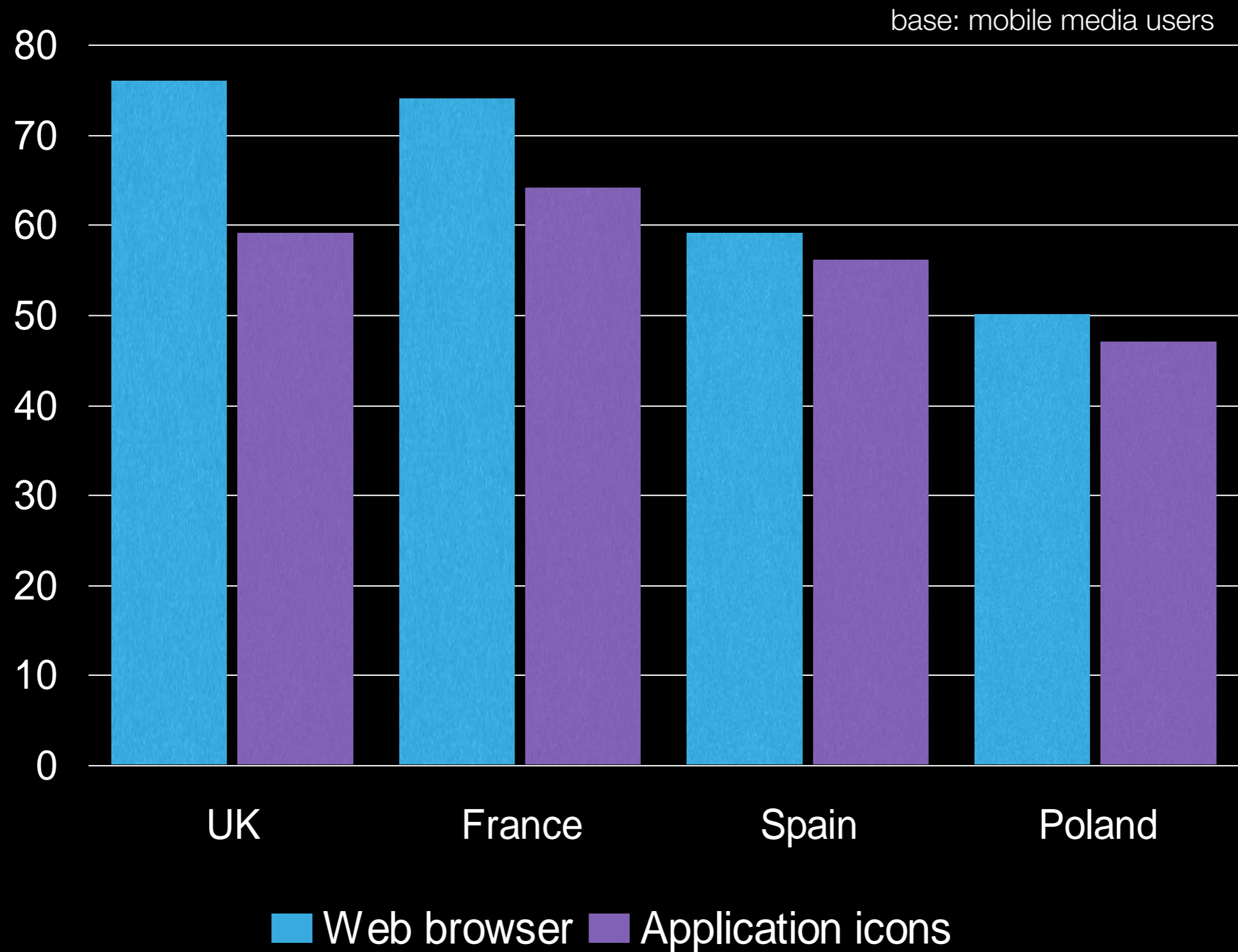
Contract Type



Data tariffs



Browser dominance confirmed, app icon access growing



Opportunities for mobile advertising



67%



59%



68%



71%

% of mobile media users
interested by at least one mobile advertising format*

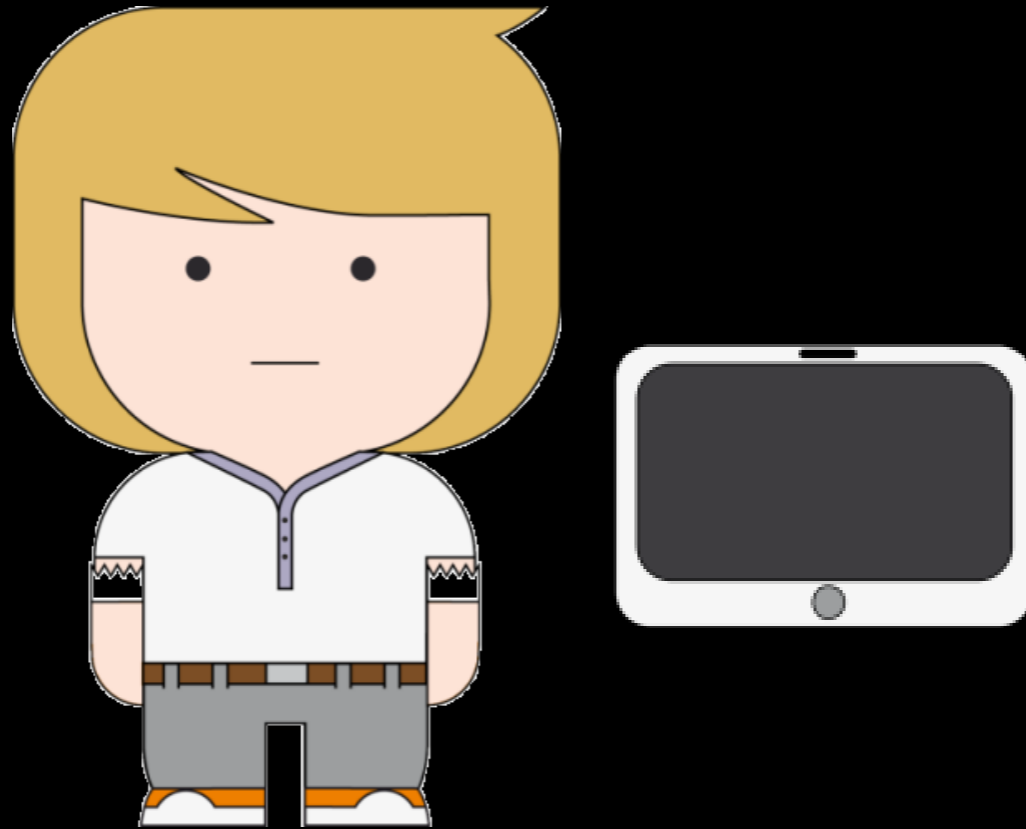
What opportunities for mobile advertising ?

% from 7 to 10 out of 10

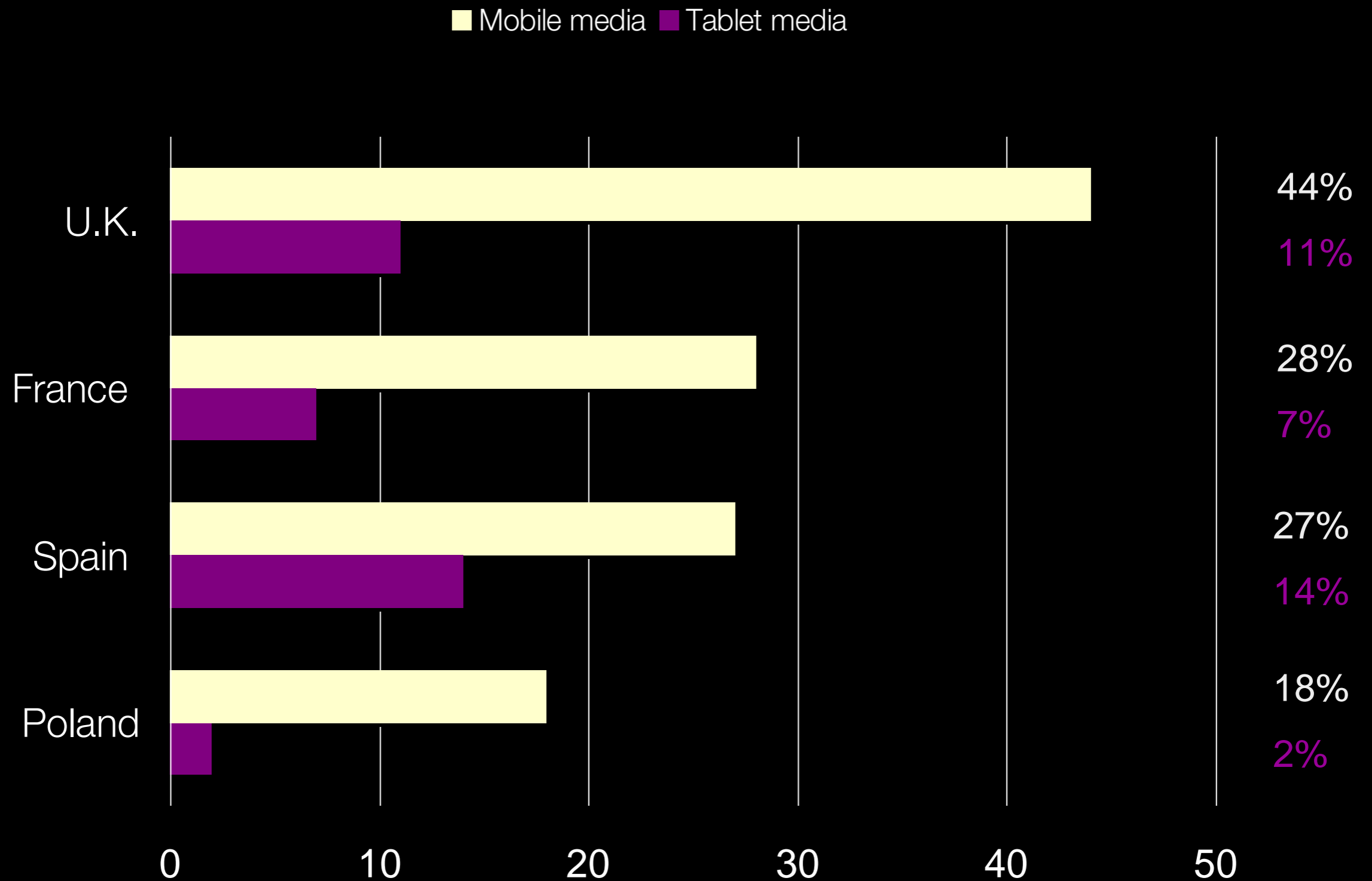


	UK	FR	ES	PL
Coupons	50% (41%)	38%	43%	45%
Alerts for special promotions /sales	31% (24%)	28% (34%)	30%	38%
Short text message advertisement	17%	16%	15%	13%
Text message sent to your phone that contained a link	24%	16%	19%	15%
Information on the area you're in via text message	28%	24%	29%	34%
Information via Bluetooth	24%	21%	26%	34%
Sponsored screen savers	24% (17%)	24%	20%	27%
Sponsored pages on the web	16%	16%	17%	15%
Sponsored games	29%	23%	28%	30%
Sponsored videos	18%	20%	19%	22%
Ads at the top or bottom of your screen	14%	11%	13%	8%
Picture or video message advertisement	16%	15%	15%	16%
Ads for tickets and reservations	23%	19%	23%	25%
Ringback tone	15%	17%	15%	35%

European tablet media landscape



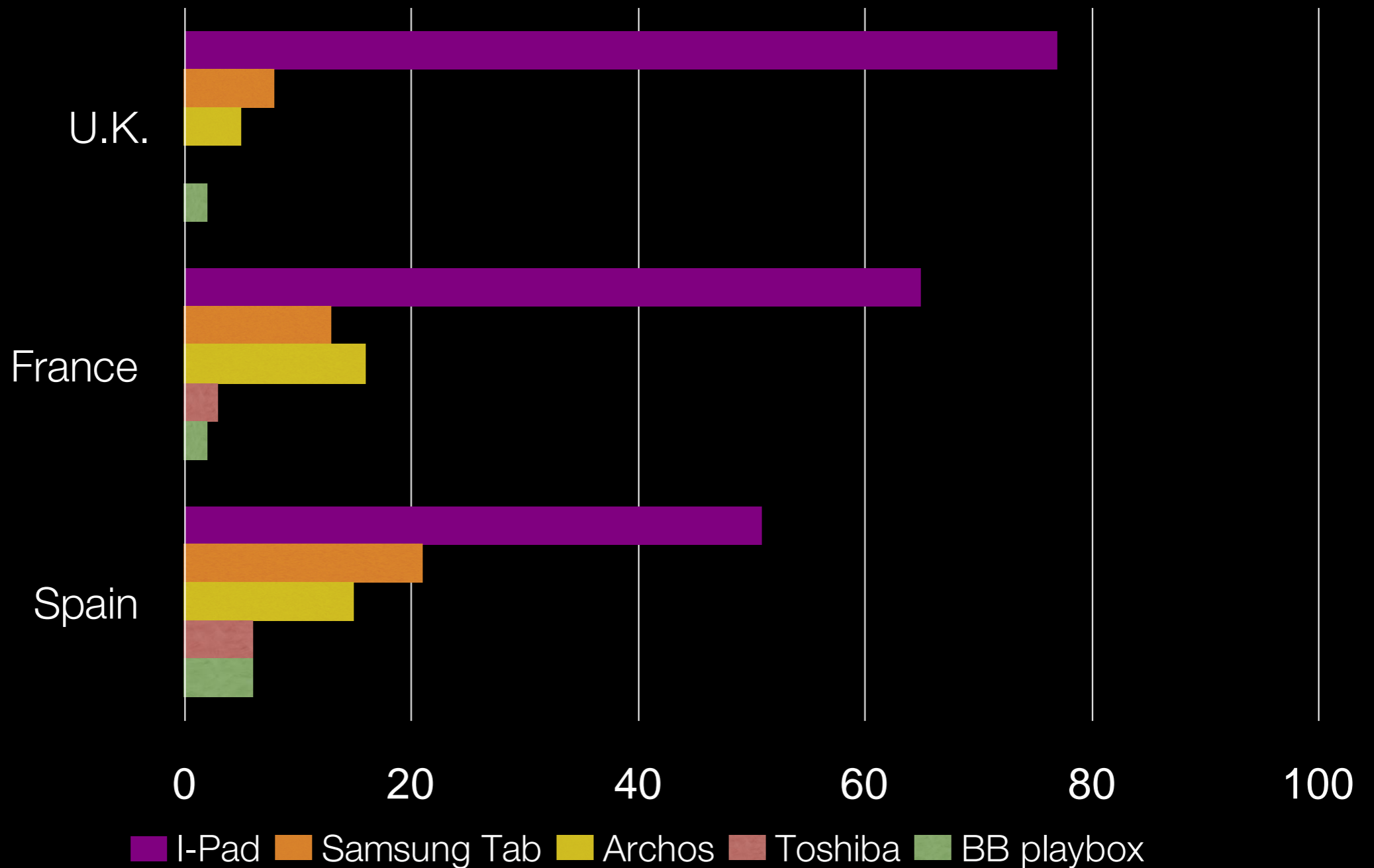
Tablet media is lagging behind mobile media



Mobile media: penetration rate among mobile owners
Tablet media: penetration rate among mobile media users




Tablet device ownership reveals major differences in Spain

Device ownership by brand (among tablet media users)

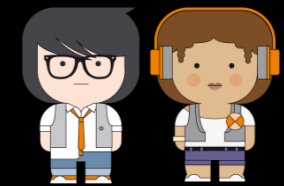


base: tablet media users

Spanish tablet user profile do not fit French and U.K. ones

				
Gender	Male	53%	55%	50%
	Female	47%	45%	50%
Age	< 35 y.o.	37%	54%	50%
Working Status	Working	78%	65%	67%

Who uses the tablet?

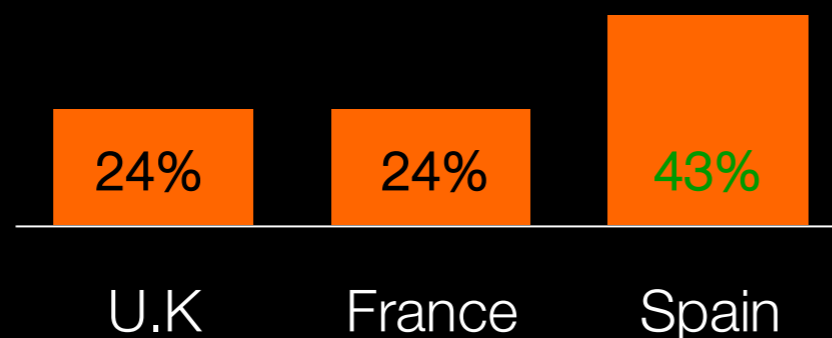


Around 2 people use the tablet in the household



83% the spouse / 44% the children

3G connection



Tablet devices do not have the same usage

Smartphone usage

Tablet usage



3.5"

on-the-go
3G



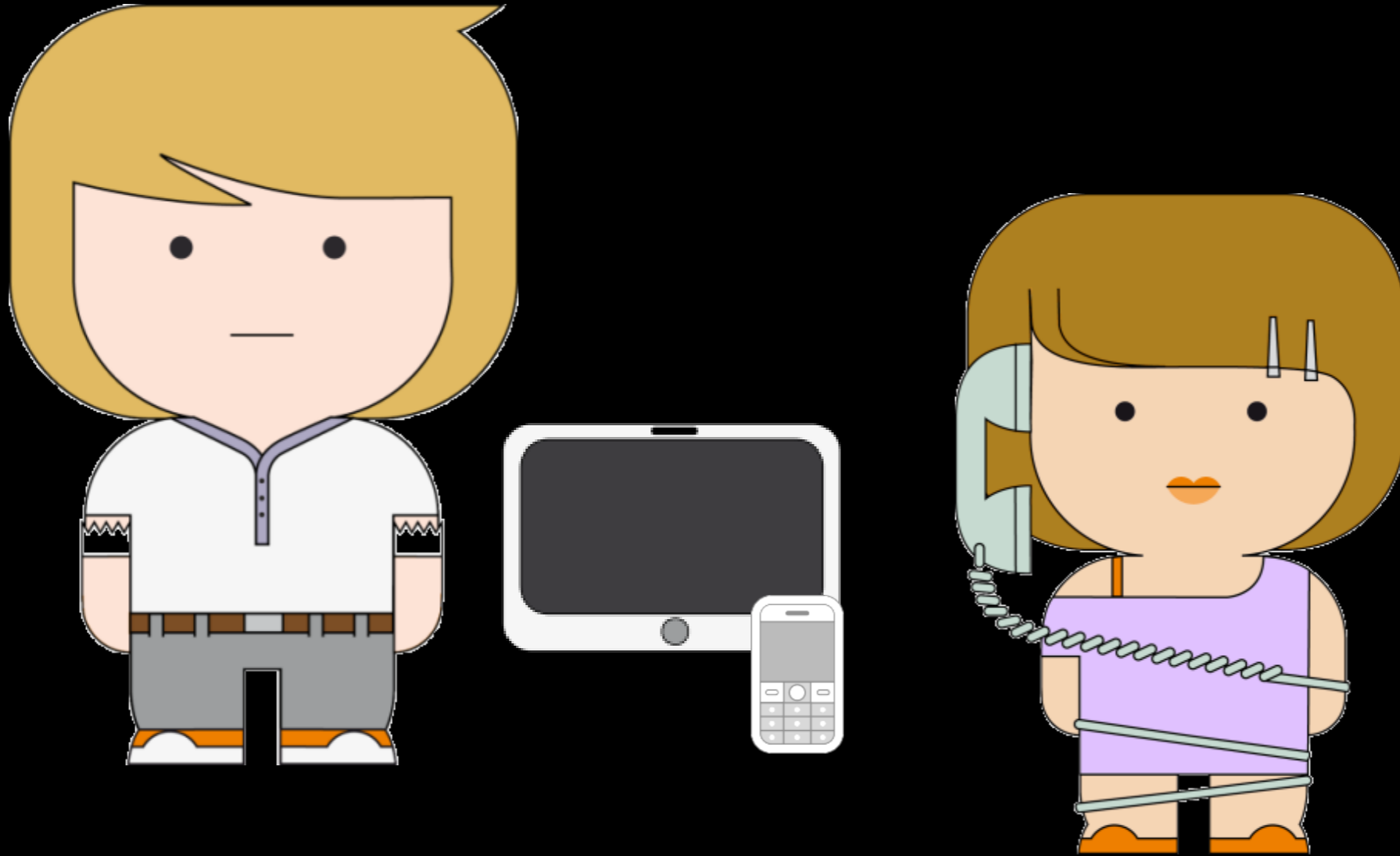
7"



9.7"

home
Wi-Fi

Mobile vs tablet media usage



Where are these devices being used?



79%

95%



50%

20%



72%

38%



57%

24%

average (UK-FR-SP-PL)

average (UK-FR)

What are these devices being used for?



“Kill time....”



“Save time....”

Mean grade of 7 on a scale from 1 to 10
'What people think about using mobile / tablet for media purpose'

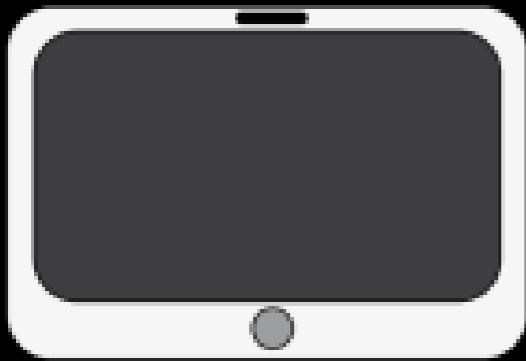
How do they effect PC (web) consumption?



Complimentary:

“...when we can't use a PC” creating new behaviours

16% increase in pc/laptop usage



Cannibalistic:

“...instead of a PC”

“more convenient”

13% decrease in pc/laptop usage

‘What people think about using mobile / tablet for media purpose’
‘What activities do people do more or less since they use mobile / tablet’

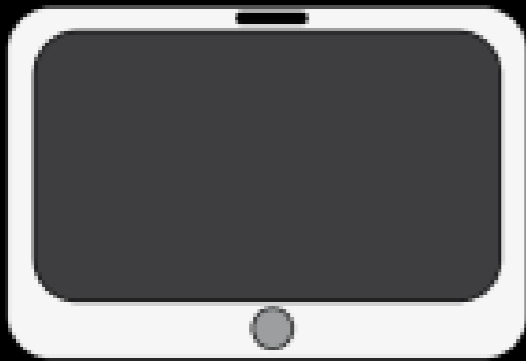
How do they effect traditional TV* consumption?



Complimentary:

2nd Screening: social + investigation

4% increase in traditional tv* consumption



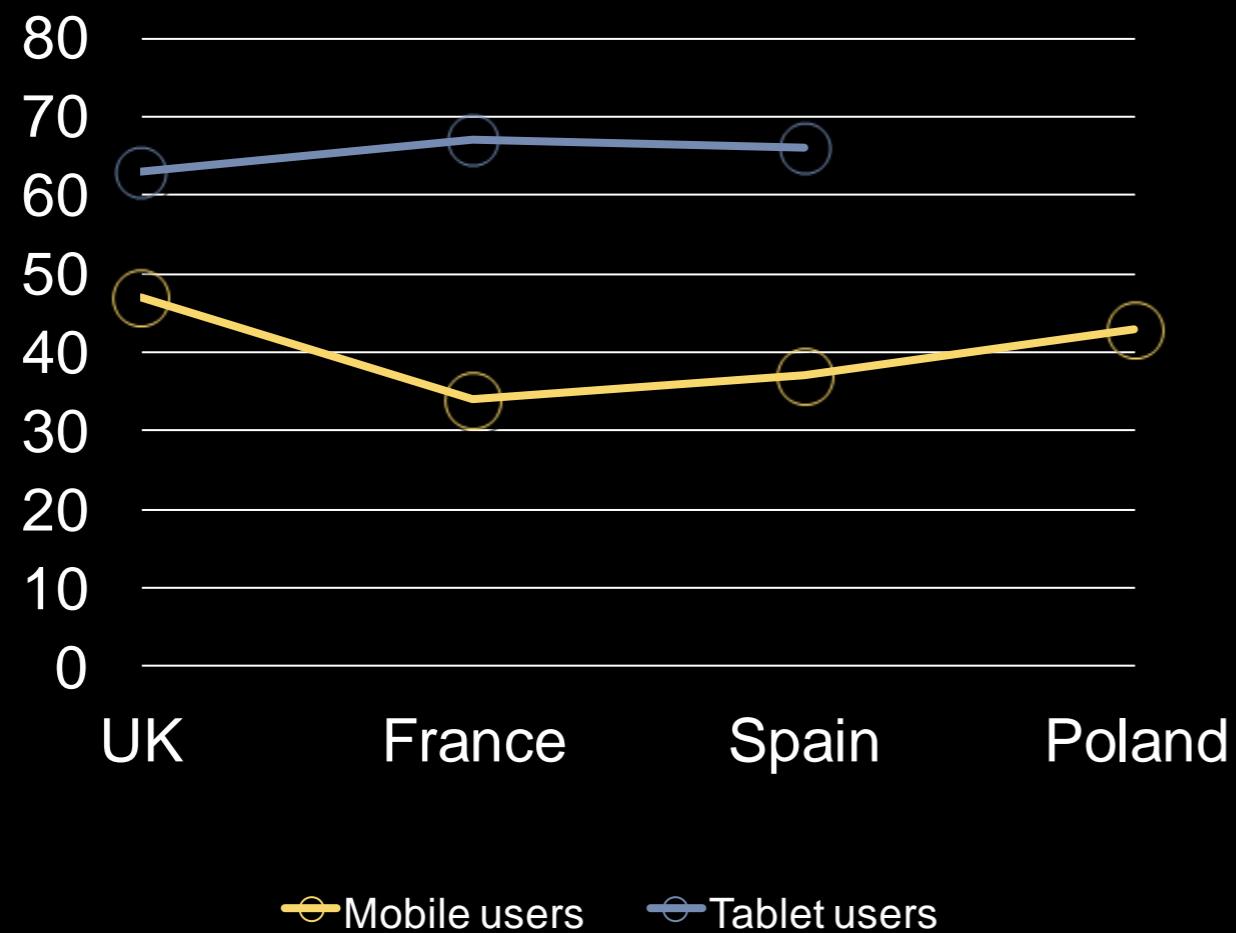
Cannibalistic:

On Demand (33%) – streaming (36%) – live TV (38%)

4% decrease in traditional tv* consumption

* traditional tv consumption: watching live tv on traditional tv set
'What activities do people do more or less since they use mobile / tablet'

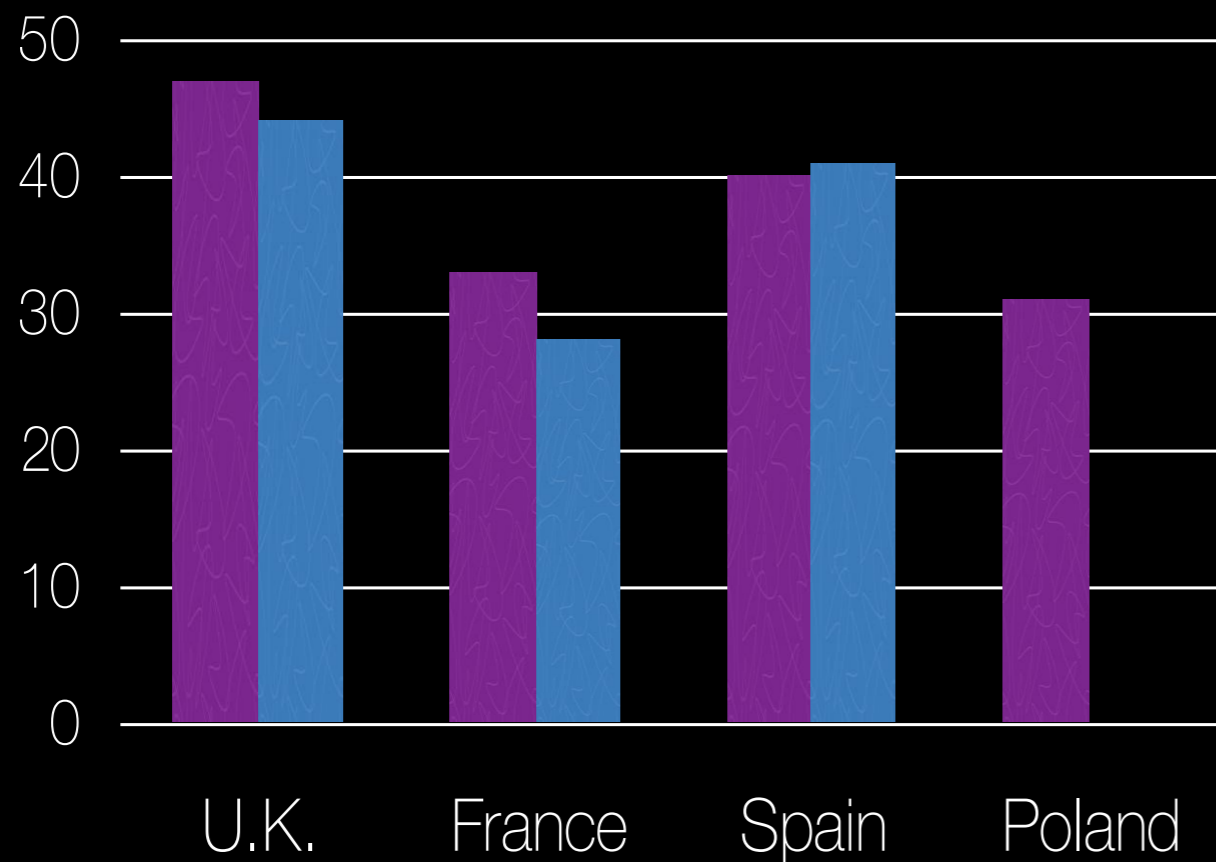
Tablet users are more likely to purchase via their devices



* M-commerce = using mobile phone to either pay, redeem or reserve something

Trust remains important on mobile and tablet

Importance of **knowledge and trust in brands** present on the Internet for mobile/tablet users



■ Mobile users ■ Tablet users



What opportunities for tablet advertising ?

Interested by at least one advertising format incl. Very interested

% At least one format from 7 to 10 out of 10
% At least one format at 10 out of 10



54%
17%



54%
19%



76%
27%

% from 7 to 10 out of 10



Coupons	39%	38%	51%	←←
Alerts for special promotions/sales	25%	32%	43%	
Information on the area you're in via text message	20%	23%	45%	
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Ads at the top or bottom of your screen	9%	15%	23%	
Ads for tickets and reservations	13%	23%	33%	←

