

UK Fast Facts

Key Findings: UK

General

- In the UK, the penetration of mobile media users increased from 30% of mobile phone owners in 2010 to 44% in 2011
- 54% are male, mobile media users are getting older: 48% are aged 35 years old and older which represents an increase compared to 2010 (41% in 2010)
- 91% of users think it is important that the sites they access from their mobile are for brands they know and trust (incl 47% very important)
- 70% of UK mobile media users pay monthly, 52% have an unlimited data package
- Mobile media users now account for 41% of the population in the UK, up from 27% last year
- UK – 44% are using mobile multimedia, up from 30% last year

Devices/ Operating Systems

- In the UK, 77% use Apple iOS (iPad), 8% Samsung and 2% BlackBerry
- There is an important increase in Smartphone ownership in the UK: 60% in 2010 to 76% in 2011. The percentage of iPhone owners also increased since 2010 (26% vs. 19% in 2010). 18% own a Samsung and 22% a Blackberry (16% in 2010)
- 24% of mobile media users have Android as their mobile OS

Activity

- Tablets are used mostly at home (95%). Only 40% use it out and about
- Most of tablet usage is done during the evening
- 76% mobile media users choose to find information and content via a browser (70% in 2010), and 59% via application. 64% of mobile media users who search the internet via browser do it from home. 71% of mobile media users who search the internet via browser do it on the move.
- Top pursuits at home are downloading games (82%) and watching TV, which is characterized by a very important growth of 30% from 2010 to 2011 (79% vs. 61% in 2010)
- The most popular mobile media activity is emailing, as in 2010 (74% vs. 60% in 2010), followed by social networking (56% vs. 44% in 2010). We can also note an increase in geolocation (53% vs. 39% in 2010) and instant messaging/chatting (37% vs. 32% in 2010)

Smartphone vs tablet use

- 70% of respondents use smartphones to 'kill time'
- 70% of respondents use tablets to 'save time'
- 63% of smartphone users use their device for finding their way around compared to 47% for tablet users

Consumption of media

- 35% of tablet users are watching on demand content, 40% are watching streaming content and 39% are 'watching TV' on their tablet
- 20% of UK customers feel they browse on the PC more because of their smartphone and 15% in the UK say they read more newspapers because of their smartphone

eCommerce

- Tablet users are 50% more likely to purchase than mobile users
- More than 60% of tablet users have made at least one m-commerce transaction (paying, reserving or redeeming something) versus 40% for mobile users
- More than 50% of tablet users have purchased online via tablet over the last 6 months (vs 24% at most for mobile users)

Browser vs apps

- In the UK, 76% of mobile media users use their mobile to browse for content, 64% do so regularly. This compares to 70% and 56%, respectively, in 2010
- Comparatively, 59% of mobile media users in the UK access online content and information via an application, 48% do so regularly



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- 35 and 28% of users in the UK use an application to access news and entertainment content, respectively
- The same trend is also observed in tablet usage; 78% of UK tablet users access the internet via search compared to 64% who do so via apps
- In the UK and France, tablet users accessed the internet more via browser - 78%, than via app icons - 64%

Mobile Advertising

- On tablets, 54% of consumers in the UK are interested in at least one advertising format
- On smartphones 67% of UK consumers said they were interested in advertising – indicating a greater acceptance of advertising on mobile
- Coupons are the most popular ad form for consumers on tablets

Mobile Media User Profile Comparison

Average Mobile Media User	Beauty & Care Product Users	Automotive Product Users
<ul style="list-style-type: none"> • 44% of UK mobile phone owners • Gender: Male 54% / Female 46% • Age <ul style="list-style-type: none"> ▪ 25% are 16-24 years old (vs 29% in 2010) ▪ 27% are 25-34 years old (vs 30% in 2010) ▪ 34% are 35-49 years old (vs 30% in 2010) ▪ 14% are 50+ (vs 11% in 2010) • Employment: 71% working 	<ul style="list-style-type: none"> • 22% of mobile media users (4.7M vs 3.2 in 2010) • Gender: Male 15% / Female 85% • Age <ul style="list-style-type: none"> ▪ 39% are 16-24 years old (vs 51% in 2010) ▪ 30% are 25-34 years old ▪ 26% are 35-49 years old (vs 20% in 2010) ▪ 5% are 50+ (vs 2% in 2010) • Employment: 67% working (vs 48% in 2010) 	<ul style="list-style-type: none"> • 15% of mobile media users (3.2M vs 2.2M in 2010) • Gender: Male 76% (vs 87% in 2010) / Female 24% (vs 13% in 2010) • Age <ul style="list-style-type: none"> ▪ 21% are 16-24 years old (vs 26% in 2010) ▪ 30% are 25-34 years old ▪ 31% are 35-49 years old (vs 36% in 2010) ▪ 18% are 50+ (vs 10% in 2010) • Employment: 78% working

About Exposure

Orange Exposure 2011 is an annual, independent consumer study by TNS that examines the usage and habits of mobile media users across four European markets. The in-depth data powers the *Orange TGI fusion in partnership with Kantar Media*, a campaign-planning tool for advertisers that features unrivalled European market intelligence. Exclusive to the Orange Advertising Network, the Orange TGI fusion is designed to help brands better understand and target mobile media users and ensure the best blend of digital and mobile media in brand and product campaigns.

Methodology

Fieldwork conducted by TNS on behalf of Orange in UK, France, Spain and Poland. Calibration phase consisted of 2000 face-to-face interviews in each country. Main research conducted online with:

- UK: 1,000 mobile media users and 150 tablet users
- France: 1,000 mobile media users and 150 tablet users
- Spain: 1,000 mobile media users and 150 tablet users
- Poland: 1,000 smartphone users and 450 iPhone users

For more information visit: <http://www.exposure2011.orangeadvertisingnetwork.co.uk/>