



press release
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Tablets revealed to cannibalise use of TV and PC in UK, according to Orange Exposure 2011

Only research of its kind to compare smartphone and tablet usage side by side – offering essential tool for advertisers to plan mobile marketing campaigns

Key findings include:

- **Tablets cannibalise, and smartphones complement, TV and PC usage**
- **Respondents more likely to make purchases on tablet than smartphone**
- **Browser more popular than applications for accessing internet for second year running across smartphones and tablets**

Orange today announces the results of Orange Exposure 2011 – an annual independent study by TNS into mobile media habits across UK, France, Spain and Poland.

Now in its fourth year, the survey reveals some striking differences in behaviour between mobile and tablet usage both inside and outside the home. With tablet data included for the first time, Orange Exposure 2011 allows advertisers to compare mobile and tablet habits side by side, analysing customers' media journey at each touch point and on each device.

Distinct characteristics between smartphone and tablet usage revealed

The research revealed that respondents use smartphones to 'kill time' – using mobile when they don't have access to other screens, whereas respondents use tablets to 'save time' – using tablets in place of other screens to be more efficient¹. The Exposure data reveals that habits are markedly different and influenced by factors such as form size. While tablet usage is more akin to PC usage in the UK with 95 per cent of usage at home, in Spain, mid-sized tablets such as Samsung's Galaxy Tab are being used as navigation devices outside the home, a usage pattern that is closer to that of smartphones. Advertisers must be aware of these nuances when planning their campaigns to understand precisely how to target their customers.

Smartphones and tablets impacting media consumption in opposite ways

There is evidence to suggest that tablet devices are actually cannibalising home TV viewing and PC usage. In the UK, 35 per cent of tablet users are watching on demand content, 40 per

¹ *mean grade of 7 on scale from 1 to 10



cent are watching streaming content and 39 per cent are 'watching TV' on their tablet. The UK has also seen a 15 per cent decrease in PC usage. Conversely, smartphones complement TV consumption. In France for example 19 per cent of users say they watch more TV as a result of their mobile media usage. The research also shines a light on how mobile media habits impact other media formats. Mobile has a positive impact on other media and device use; 20 per cent of UK customers feel they browse on the PC more and 15 per cent read more newspapers online as a result of engaging with mobile multimedia.

Bruce Hoang, Group Marketing Director, Orange Advertising Network, comments, "This is the first time we have included tablet usage in the Orange Exposure report and the findings are quite stark in their description of how people are using devices. Clearly the one size fits all approach for digital content across TV, PC, smartphone and tablet does not work and this has significant implications for content producers and advertisers."

Fused with the TGI database, the Exposure research provides rich insights for advertisers into what, when, why and where Europeans are using mobile media, creating a rich resource to help brands and advertisers better plan, execute and measure mobile marketing campaigns.

Tablet users more willing to spend than smartphone users

The research revealed that tablet users were 50 per cent more likely to purchase online than mobile users. And that more than 60 per cent of tablet users have made at least one 'm-commerce' transaction (paying, reserving or redeeming something). This compares to 47 per cent of mobile users. As consumers continue to opt for their tablet over their PC, this presents advertisers with unique opportunities to capture attention and engage consumers that encourage purchasing decisions.

Browser still king – but apps usage still growing

For the second year running, the mobile browser continues its dominance over mobile applications as the most frequent format for accessing online information and content across both mobile and tablet. In the UK, 76 per cent of mobile media users use their mobile browser to access content as opposed to 59 per cent using a mobile application. The same trend is also observed in tablet usage 78 per cent of UK tablet users access the internet via search compared to 64 percent who do so via apps.

Jon Mew, Director of Mobile and Operations, Internet Advertising Bureau (IAB) comments, "Without data and analysis advertisers cannot take full advantage of mobile advertising opportunities. As the industry grows it will be important to integrate mobile along with other advertising formats; attitudinal data such as the Orange Exposure research is welcomed as a fundamental resource for advertisers."



Sienne Veit, Social and Mobile Development Manager, Marks and Spencer, comments, “The Orange Exposure 2011 data mirrors our own experience that more consumers are interacting with brands via mobile and tablets. Brands will miss out on mobile opportunities to connect with the consumer if they don’t adapt for mobile and tablets taking into account local nuances and influencing factors such as screen size for example. With this research, brands can cut through the complexity to understand precisely how to target their consumers.”

For more information on Orange Exposure 2011 and the Orange Mobile Targeting Monitor:

<http://exposure2011.orangeadvertisingnetwork.co.uk/>

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About Orange Exposure 2011

The Orange Exposure 2011 research is taken from the Orange Mobile Targeting Monitor (OMTM) a campaign and planning tool developed for the advertising industry in Europe. The data is fused with the TGI database, providing a detailed picture of mobile media usage, illustrating how, where and why mobile users access content, information and entertainment. Advertisers and brands are able to use the data to analyse audiences and target mobile marketing campaigns more effectively.

Fieldwork was conducted by TNS, on behalf of Orange. Research conducted in UK, France, Spain and Poland. Calibration phase consisted of 2000 face-to-face interviews nationally representative 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

About Orange

France Telecom-Orange is one of the world’s leading telecommunications operators with 170,000 employees worldwide, including 102,000 employees in France, and sales of 33.8 billion euros in the first nine months of 2011. Present in 35 countries, the Group had a customer base of 221 million customers at 30 September 2011, including 145 million customers under the Orange brand, the Group’s single brand for internet, television and mobile services in the majority of countries where the company operates. At 30 September 2011, the Group had 162 million mobile customers and 14 million broadband internet (ADSL, fibre) customers worldwide. Orange is one of the main European operators for mobile and broadband internet services and, under the brand Orange Business Services, is one of the world leaders in providing telecommunication services to multinational companies.



With its industrial project, "conquests 2015", Orange is simultaneously addressing its employees, customers and shareholders, as well as the society in which the company operates, through a concrete set of action plans. These commitments are expressed through a new vision of human resources for employees; through the deployment of a network infrastructure upon which the Group will build its future growth; through the Group's ambition to offer a superior customer experience thanks in particular to improved quality of service; and through the acceleration of international development

France Telecom (NYSE:FTE) is listed on Euronext Paris (compartment A) and on the New York Stock Exchange.
For more information (on the internet and on your mobile): www.orange.com, www.orange-business.com, www.orange-innovation.tv

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