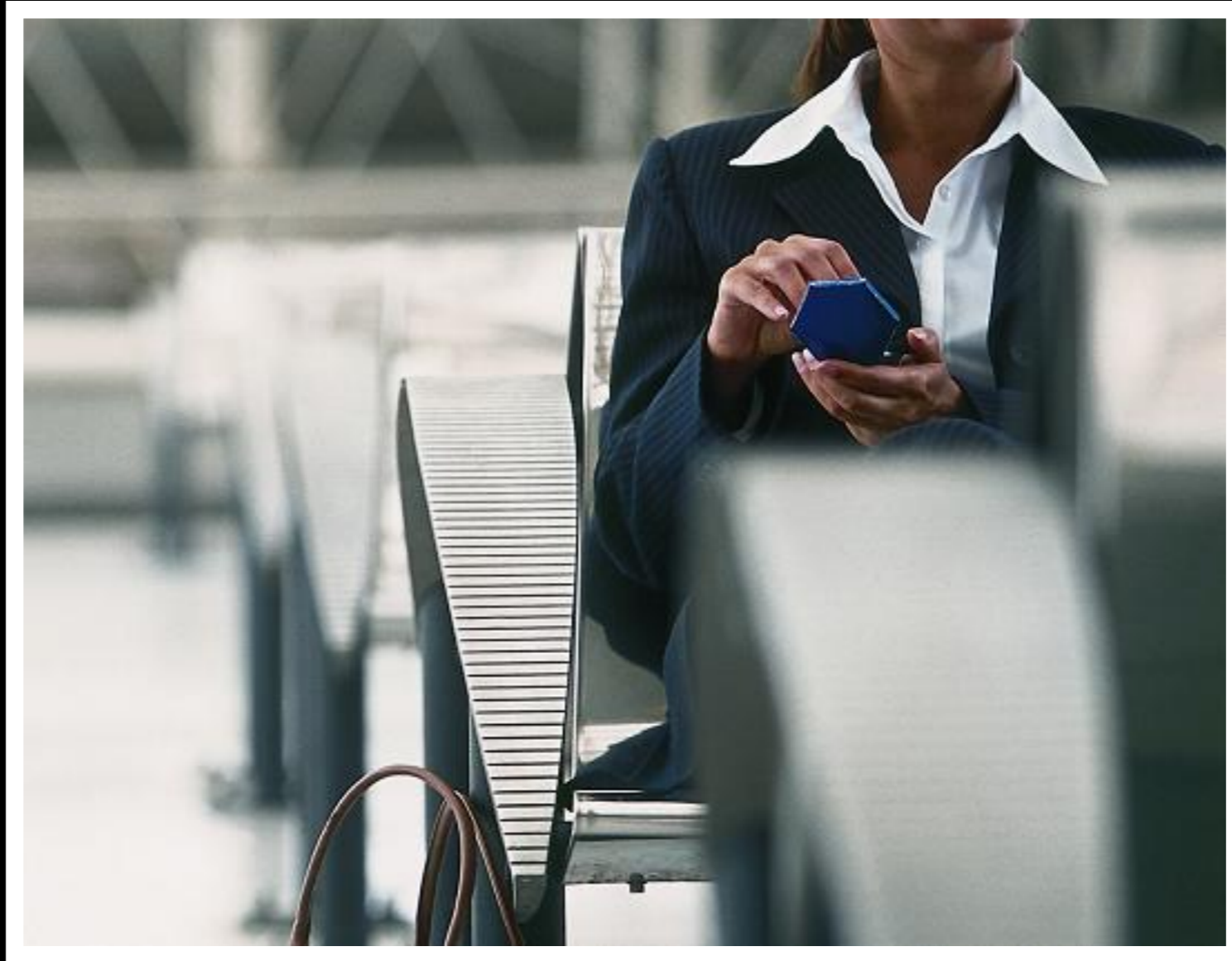


# Exposure 2011



*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.

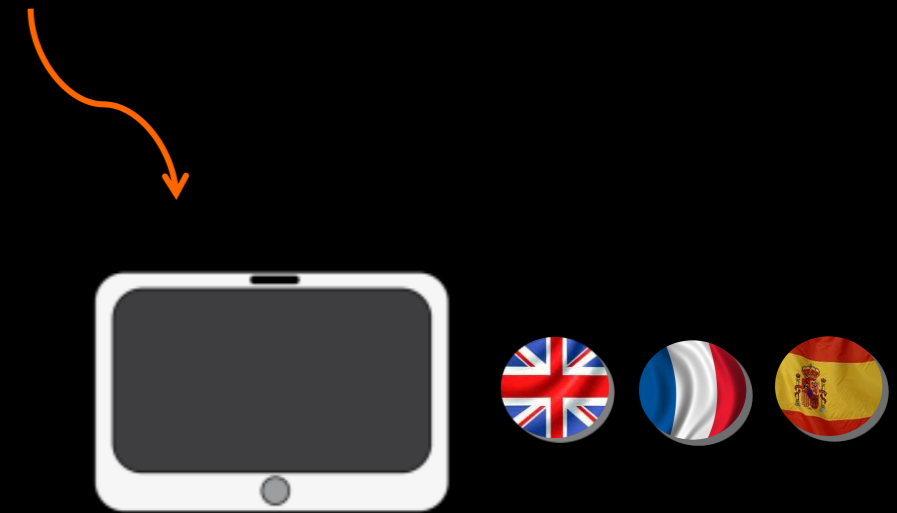


# Methodology

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

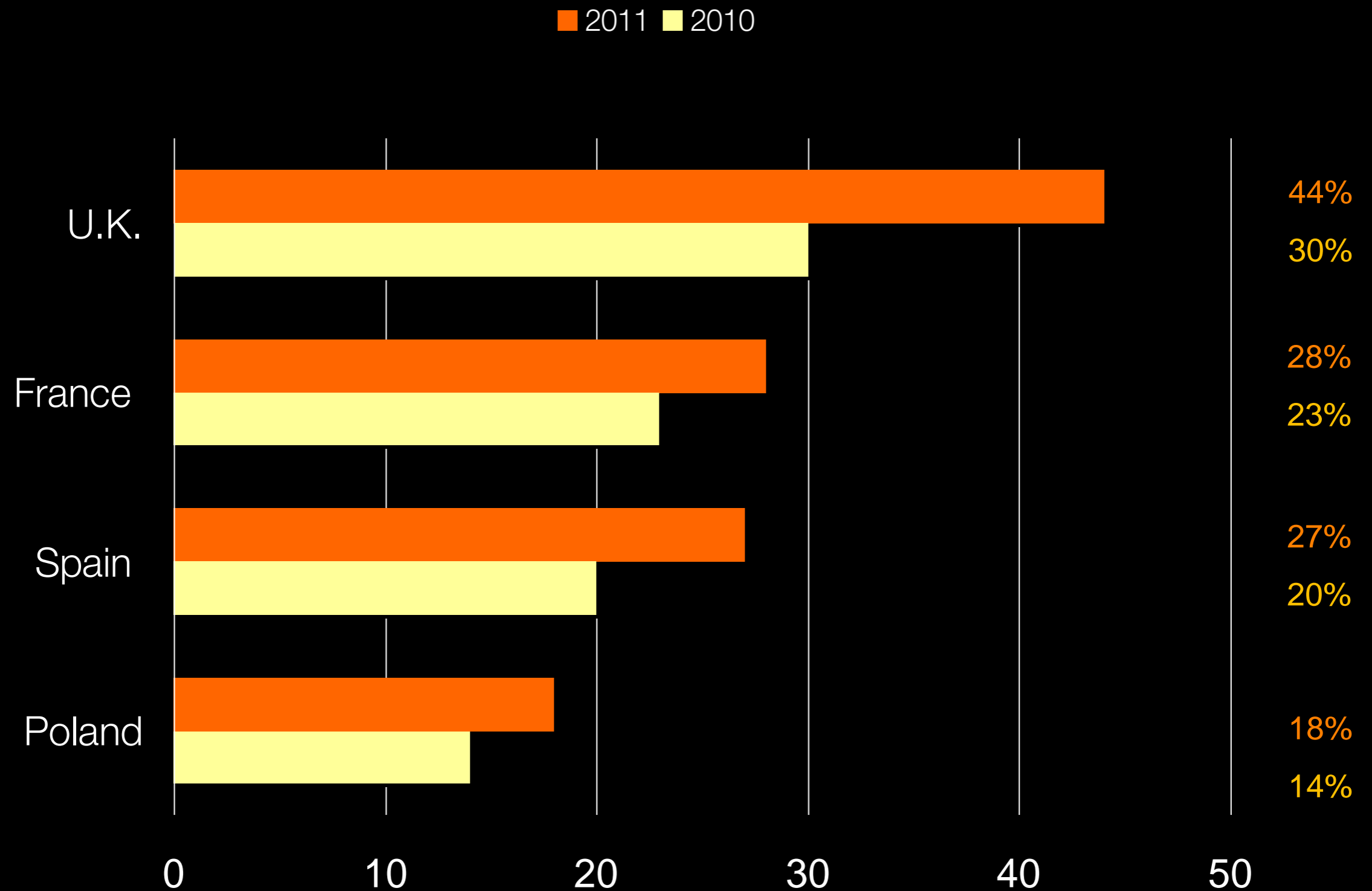
Read or download books

Read newspapers/magazines

# European mobile media landscape

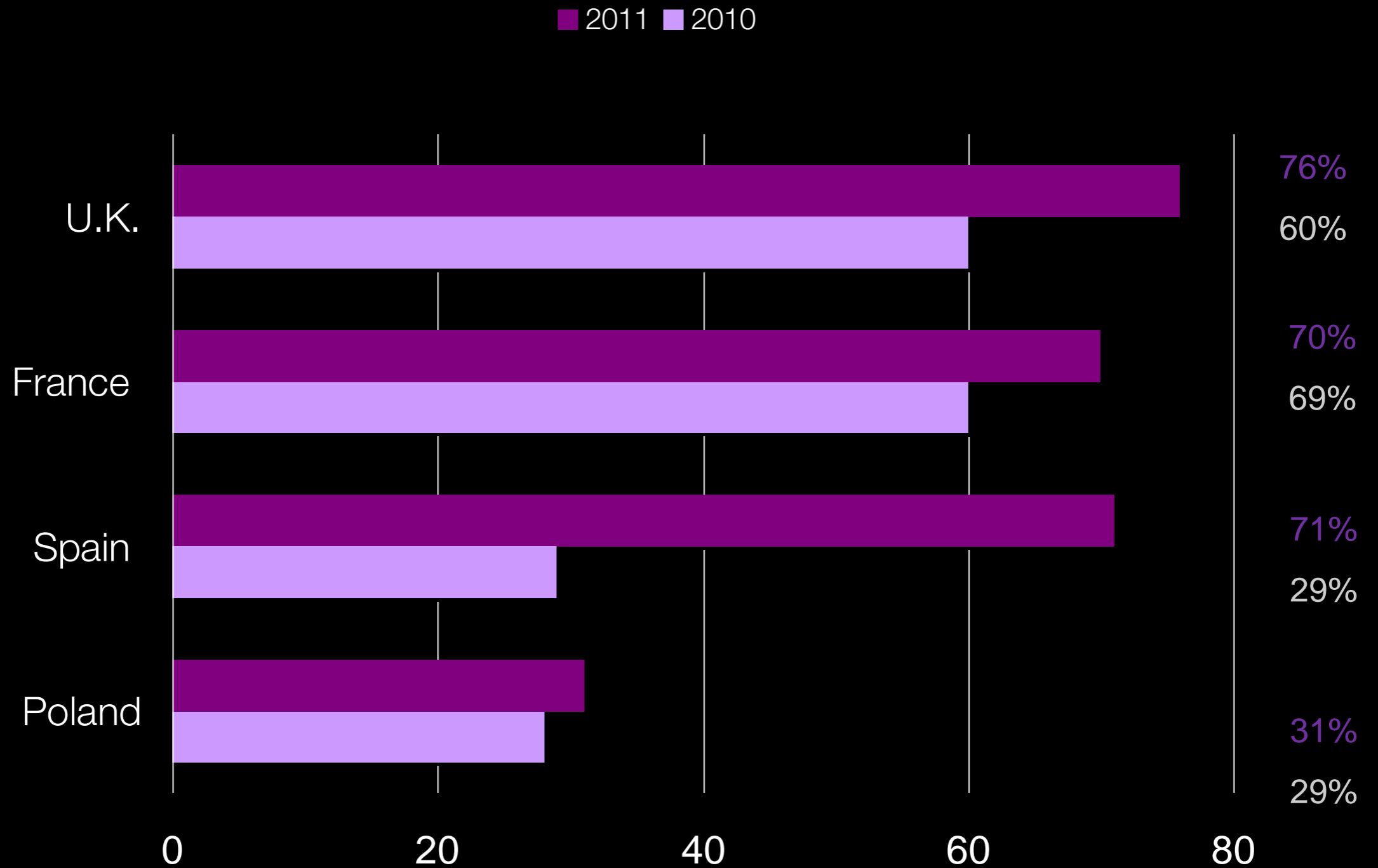


# Mobile media is growing



Penetration rate for mobile media usage among mobile owners

# Smartphone penetration has ramped up in Spain

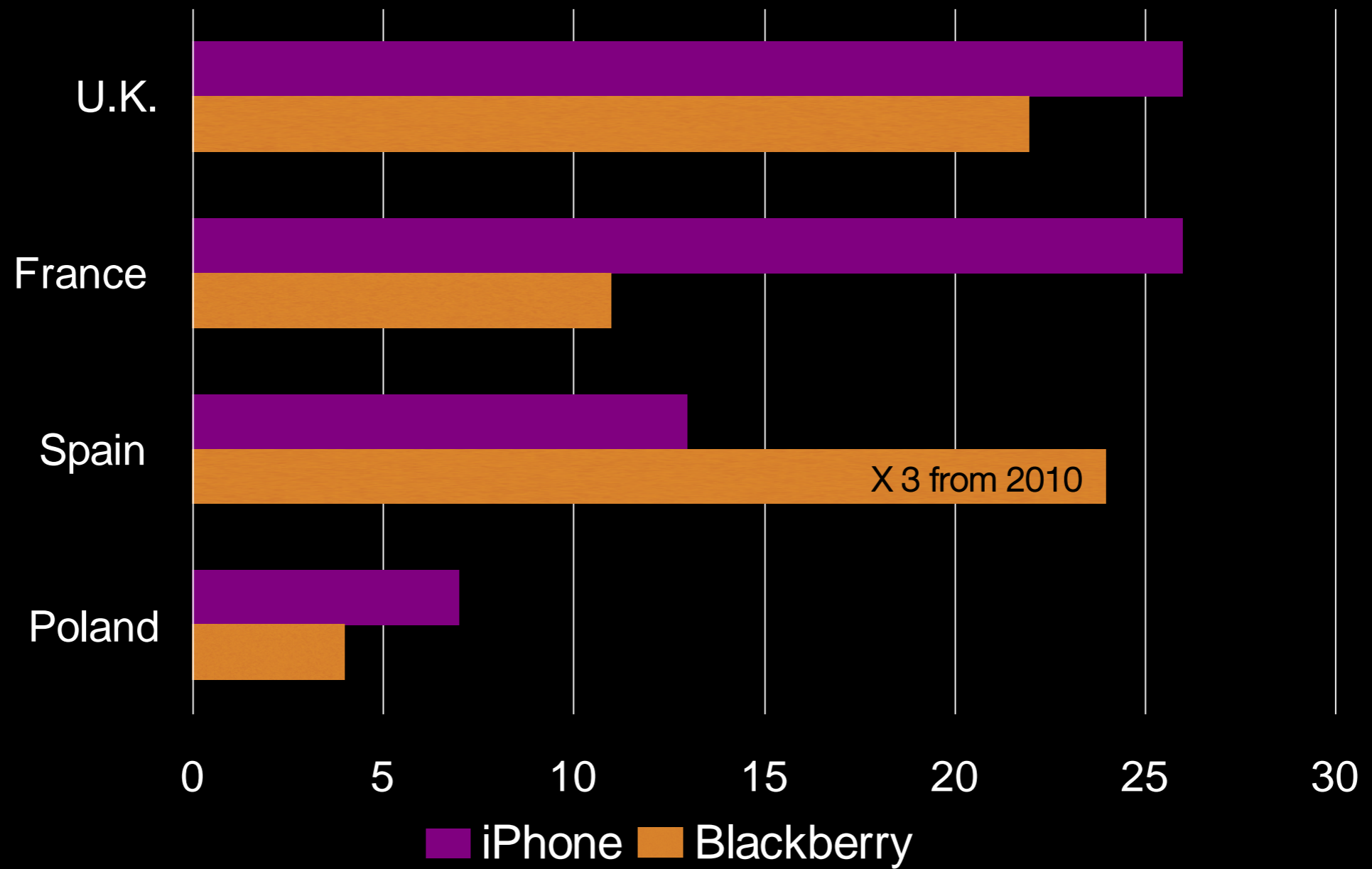


Penetration rate among mobile media users



# iPhone and BB make up large % of users

Smartphone ownership by brand (among mobile media users)



base: mobile media users

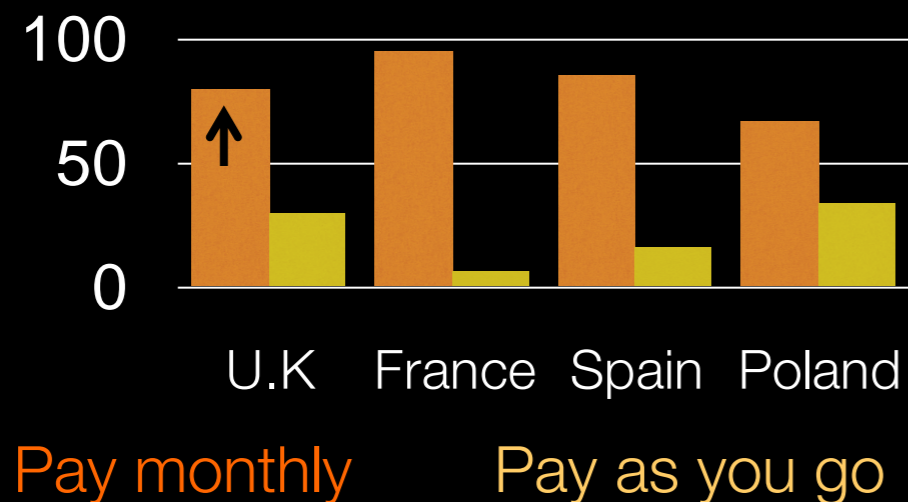
# Photofit of a typical European mobile media user



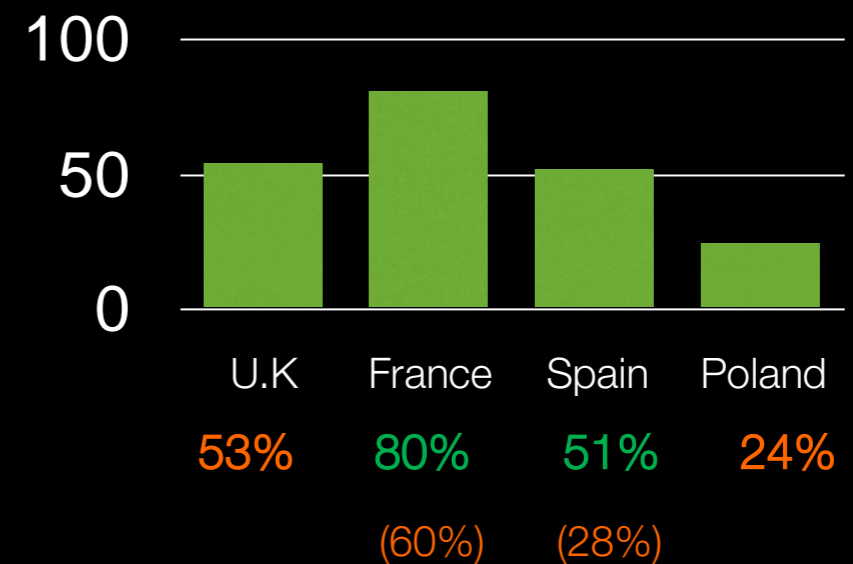
55% male  
 45% female  
 58% are under 35  
 68% are fully employed  
 16% are students



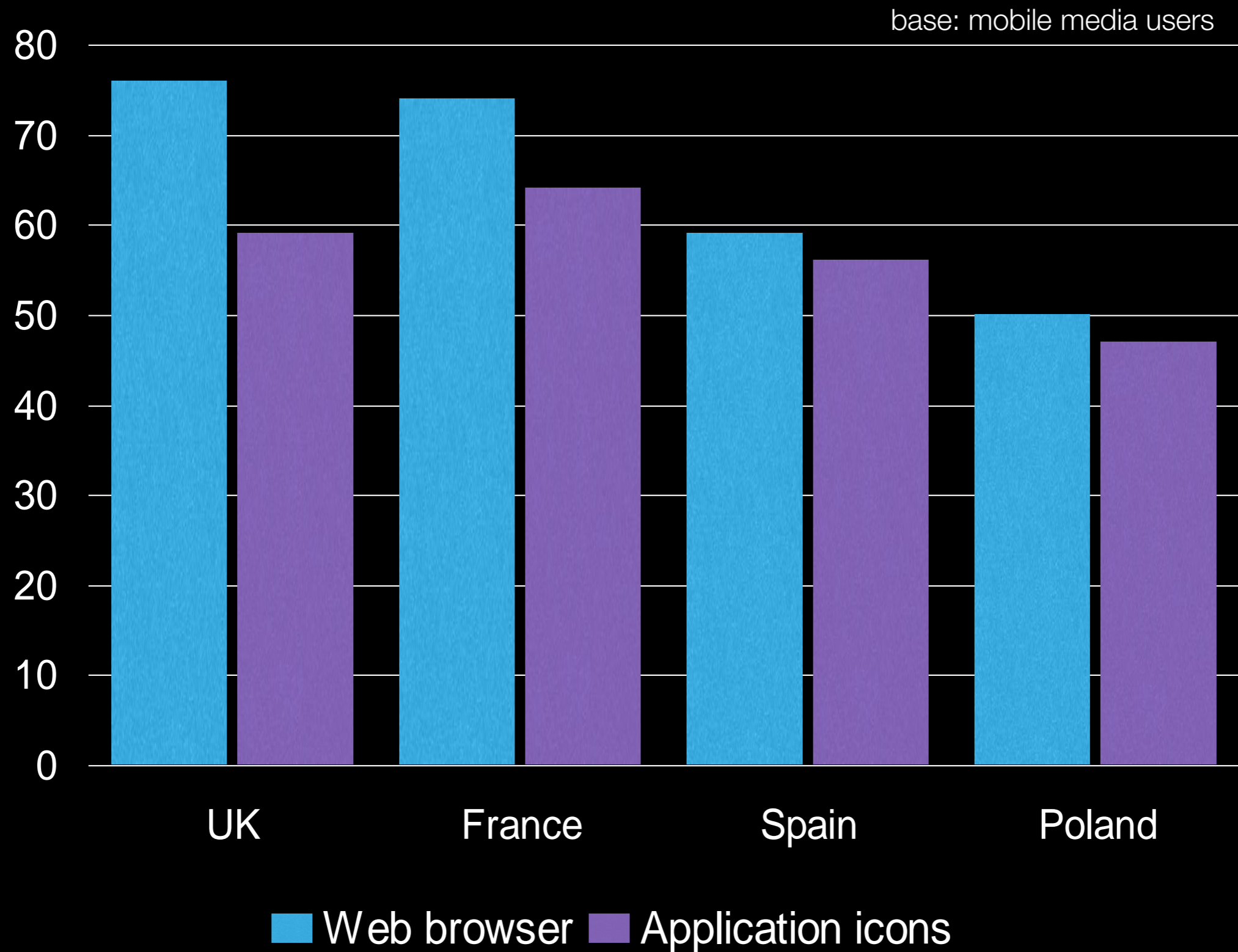
## Contract Type



## 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\*

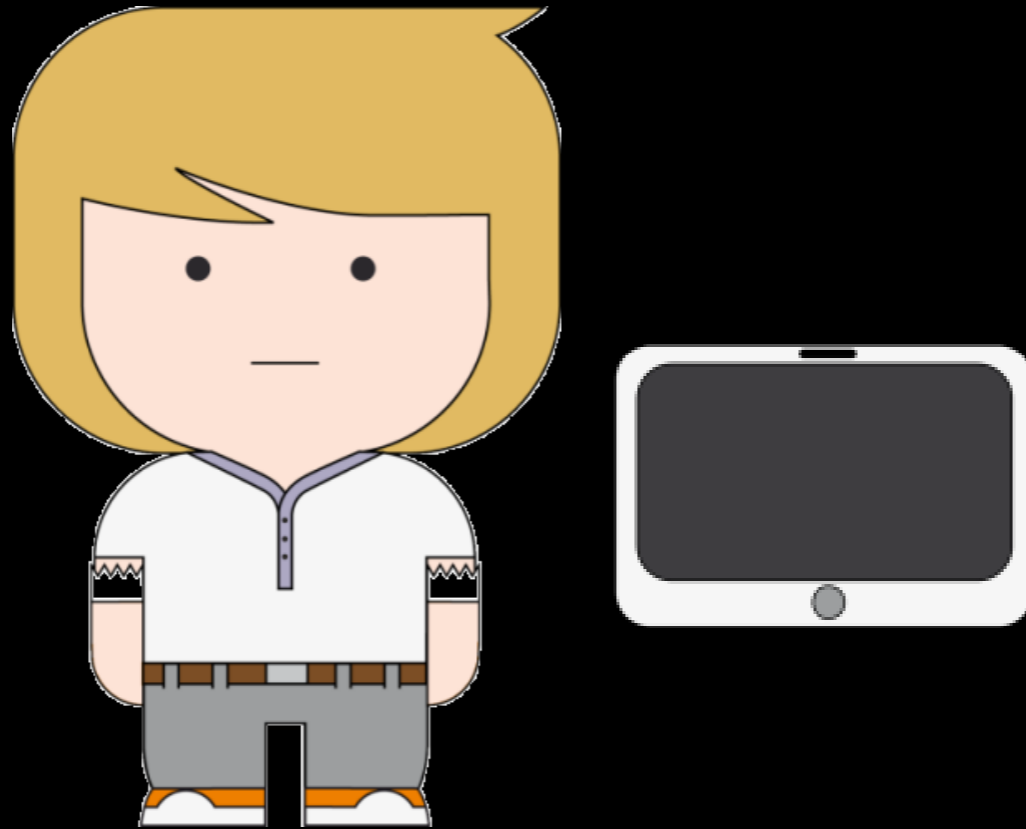
# What opportunities for mobile advertising ?

% from 7 to 10 out of 10

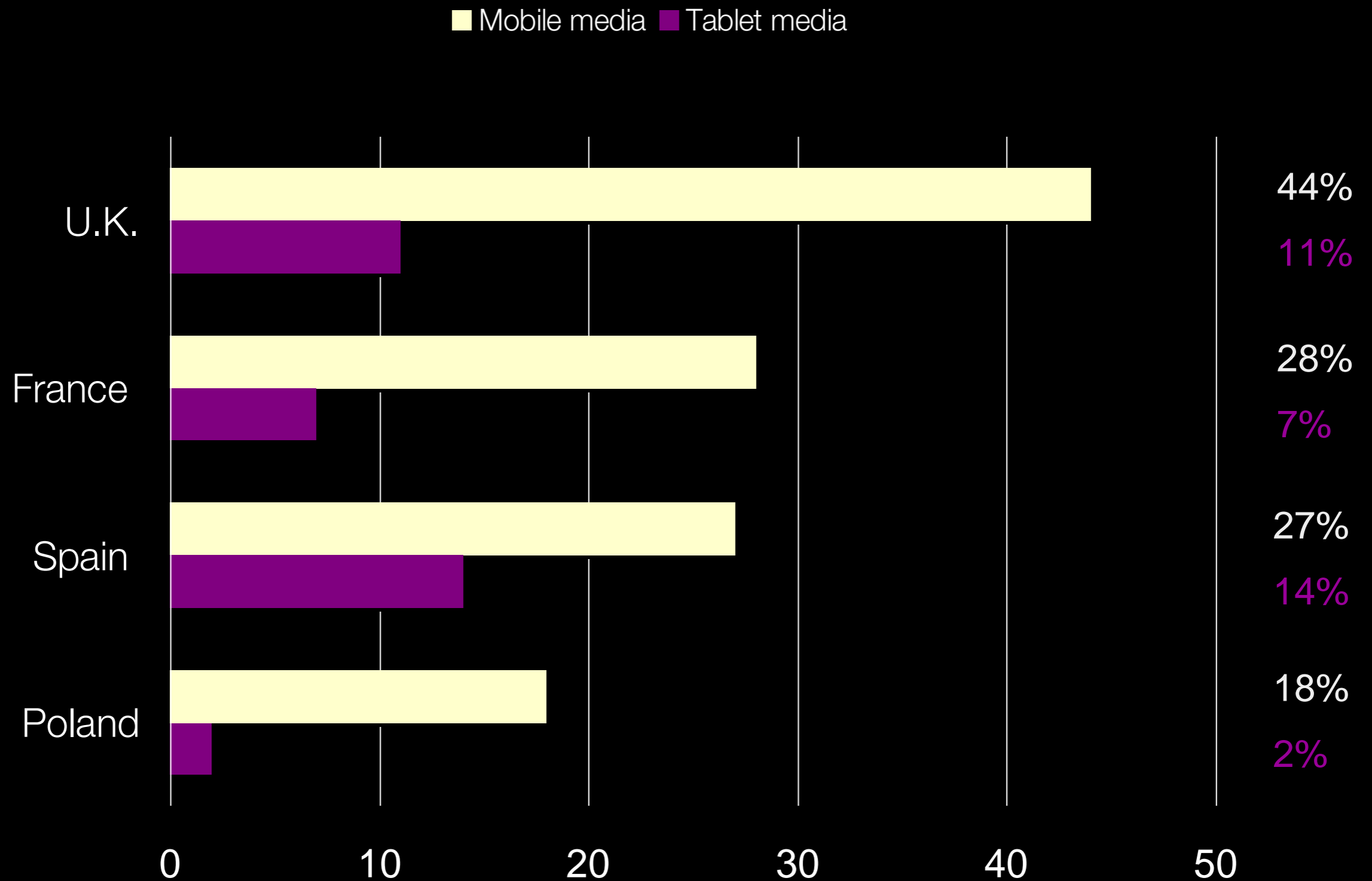


	UK	France	Spain	Poland
<b>Coupons</b>	50% (41%)	38%	43%	45%
<b>Alerts for special promotions /sales</b>	31% (24%)	28% (34%)	30%	38%
<b>Short text message advertisement</b>	17%	16%	15%	13%
<b>Text message sent to your phone that contained a link</b>	24%	16%	19%	15%
<b>Information on the area you're in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

# European tablet media landscape



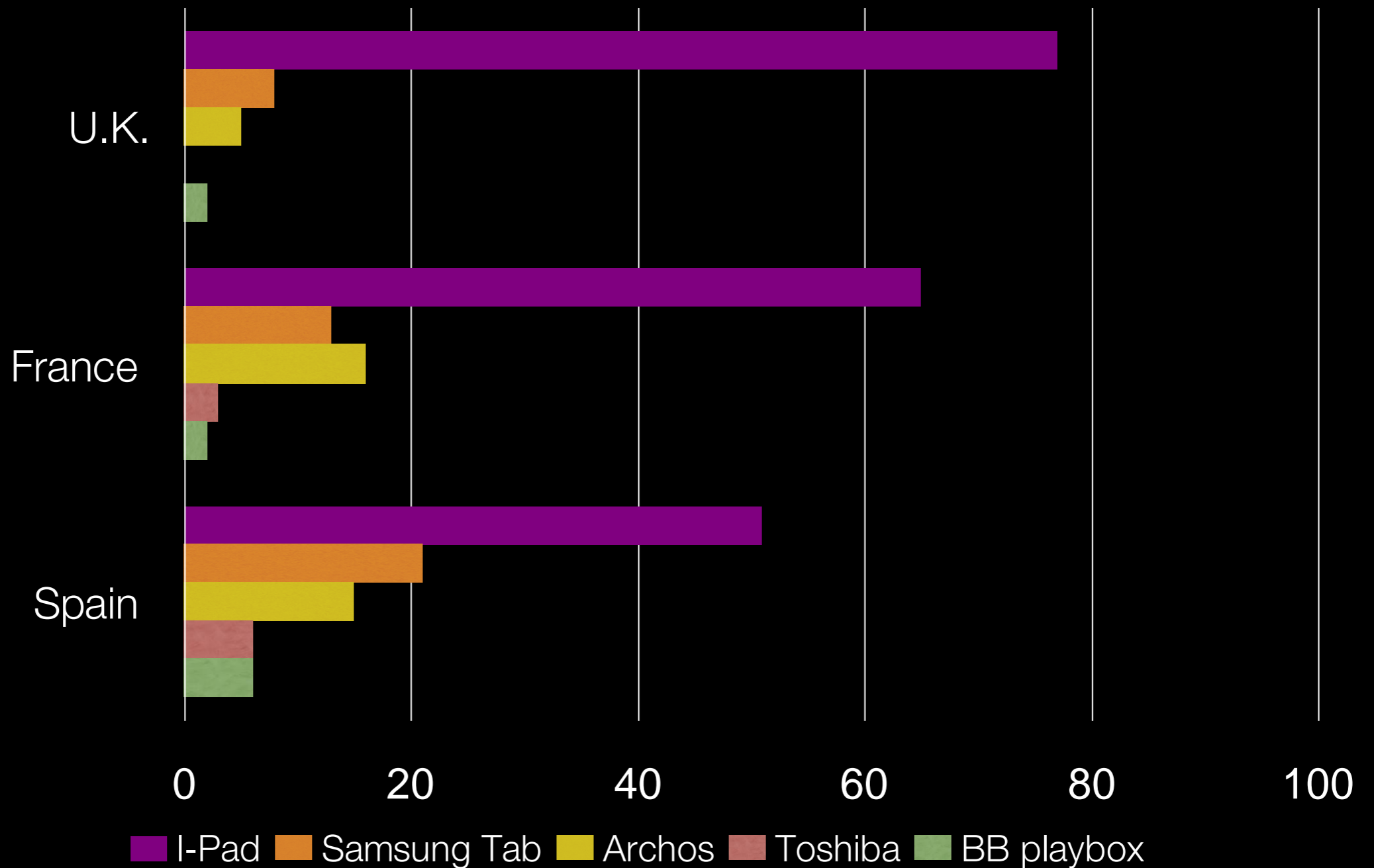
# Tablet media is lagging behind mobile media



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)



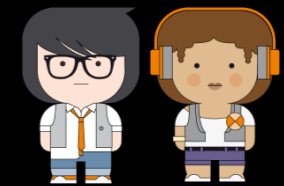
base: tablet media users



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

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

Who uses the tablet?

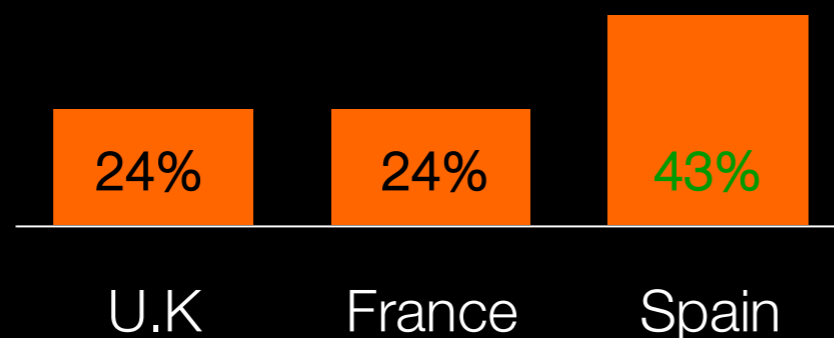


Around 2 people use the tablet in the household



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'

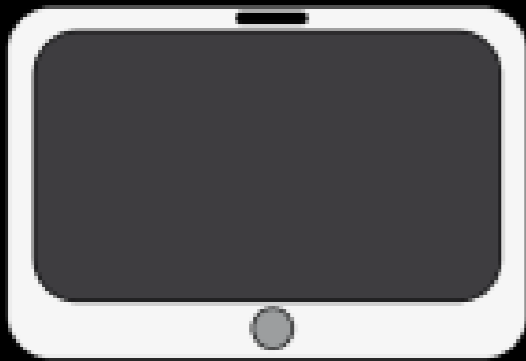
# How do they effect PC (web) consumption?



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’

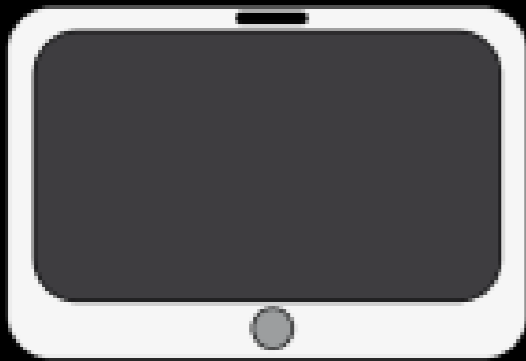
# How do they effect traditional TV\* consumption?



Complimentary:

2<sup>nd</sup> Screening: social + investigation

4% increase in traditional tv\* consumption



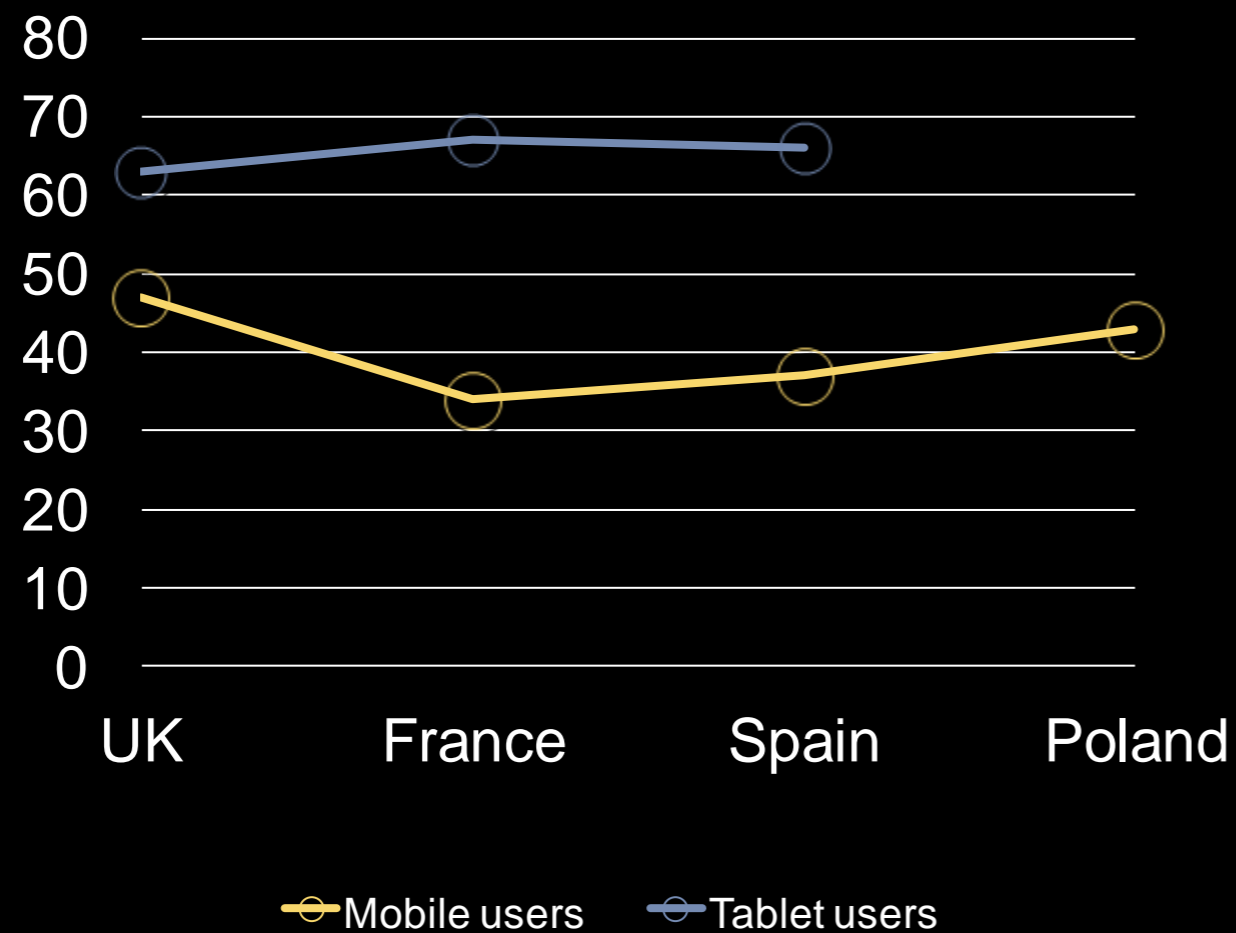
Cannibalistic:

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

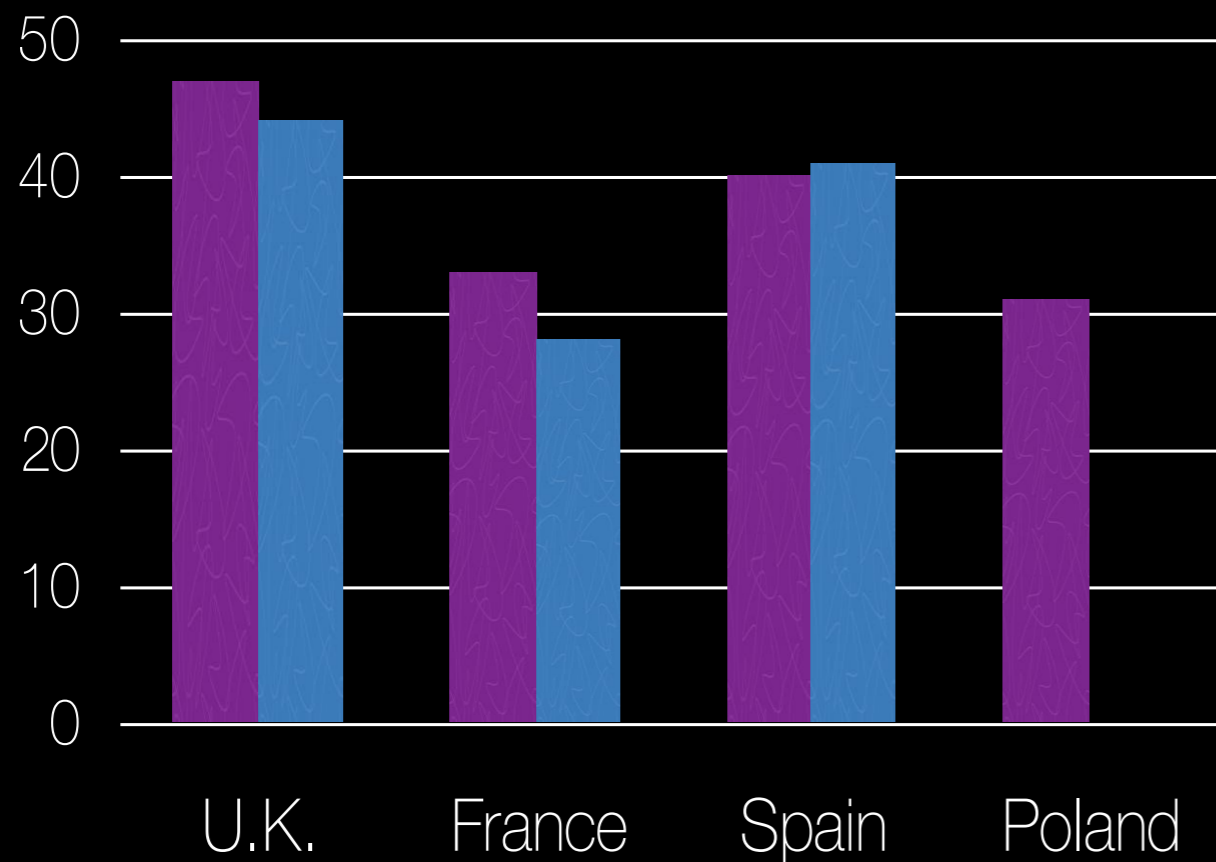


\* M-commerce = using mobile phone to either pay, redeem or reserve something



# 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



<b>Coupons</b>	39%	38%	51%	←←
<b>Alerts for special promotions/sales</b>	25%	32%	43%	
<b>Information on the area you're in via text message</b>	20%	23%	45%	
<b>Information via Bluetooth</b>	18%	21%	33%	
<b>Sponsored screen savers</b>	17%	18%	32%	
<b>Sponsored pages on the web</b>	9%	17%	28%	
<b>Sponsored games</b>	23%	22%	37%	
<b>Sponsored videos</b>	11%	23%	27%	
<b>Ads at the top or bottom of your screen</b>	9%	15%	23%	
<b>Ads for tickets and reservations</b>	13%	23%	33%	←

