Mobile Barometer

Q1 2013 EU5

MOBILE MARKETING ASSOCIATION

comScore

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Foreword

“The end of 2012 marked a milestone for mobile device ownership as for the first time smartphone penetration in all of the major European markets surpassed 50%. Smartphone growth continues apace in 2013 and has spurred a pivotal shift In how people engage online in particular with brands as well as with each other. Add to the mix the steely rise in tablet ownership and the ubiquity of mobile broadband connectivity and we are witnessing the consumption of digital media in ever greater amounts across an increasingly diverse range of devices. With mobile central to people’s daily lives its place as an indispensible part of the marketing mix cannot be stressed enough.

Understanding the dynamics and trends in mobile behaviour is therefore imperative in order to optimise your marketing strategy and more fundamentally grow your business. With this endeavour in mind, the Mobile Marketing Association is delighted to be working in partnership with comScore to provide you valuable mobile insights for five key European markets. This is the first in a series of quarterly reports aimed at professionals working across the mobile value chain that provides demographic data for a set of key mobile measures. We hope that you find this report of strategic value and that it helps you understand your audience better.”

Paul Berney
CMO & Managing Director EMEA
Mobile Marketing Association

MOBILE MARKETING ASSOCIATION

Summary (Millions)

	UK	Germany	France	Spain	Italy
Installed Base	**49.5**	**61.0**	**47.5**	**35.0**	**48.0**
Access internet	33.9	32.9	26.3	24.6	27.1
Use Social Media	22.4	17.8	14.2	15.3	15.7
Watch Video	12.3	12.1	8.1	10.3	10.5
Use Application	30.8	29.6	21.9	22.2	23.2
Scan QR Code	3.3	6.1	3.4	3.2	3.4
Play Game	19.9	19.4	9.1	12.8	17.5
Send Text	45.4	48.1	42.3	25.3	40.0
Own Android Phone	16.6	19.6	14.1	16.0	11.8
Own iPhone	9.4	7.3	6.0	2.4	4.3
Own BlackBerry Phone	4.1	0.5	2.1	1.6	1.2
Own Windows Phone	1.5	1.7	1.3	0.8	2.2
Own Tablet	10.8	7.6	7.2	5.2	6.1

Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Summary (% of Base)

	UK	Germany	France	Spain	Italy
Installed Base	**49.5**	**61.0**	**47.5**	**35.0**	**48.0**
Access internet	69%	54%	55%	70%	56%
Use Social Media	45%	29%	30%	44%	33%
Watch Video	25%	20%	17%	30%	22%
Use Application	62%	49%	46%	63%	48%
Scan QR Code	7%	10%	7%	9%	7%
Play Game	40%	32%	19%	37%	36%
Send Text	92%	79%	89%	72%	83%
Own Android Phone	34%	32%	30%	46%	25%
Own iPhone	19%	12%	13%	7%	9%
Own BlackBerry Phone	8%	1%	4%	4%	2%
Own Windows Phone	3%	3%	3%	2%	5%
Own Tablet	22%	12%	15%	15%	13%

Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

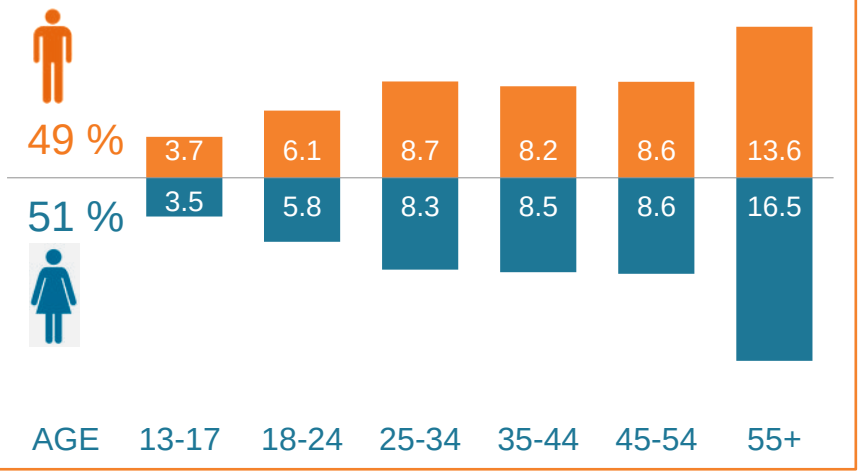


United Kingdom

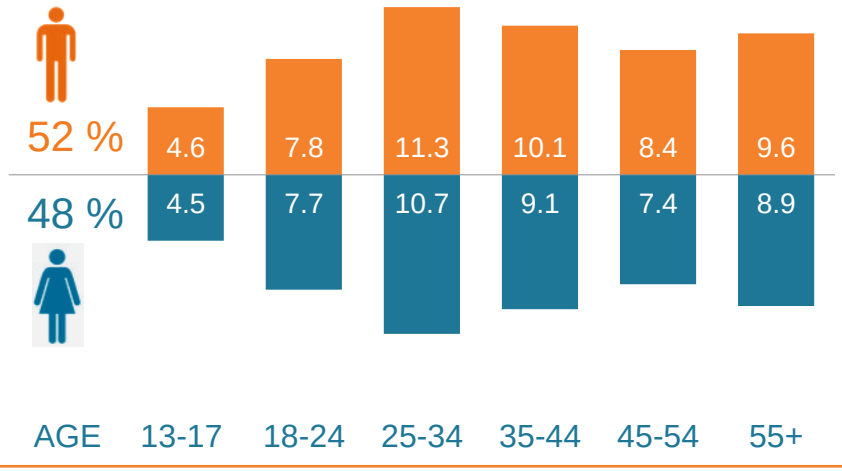


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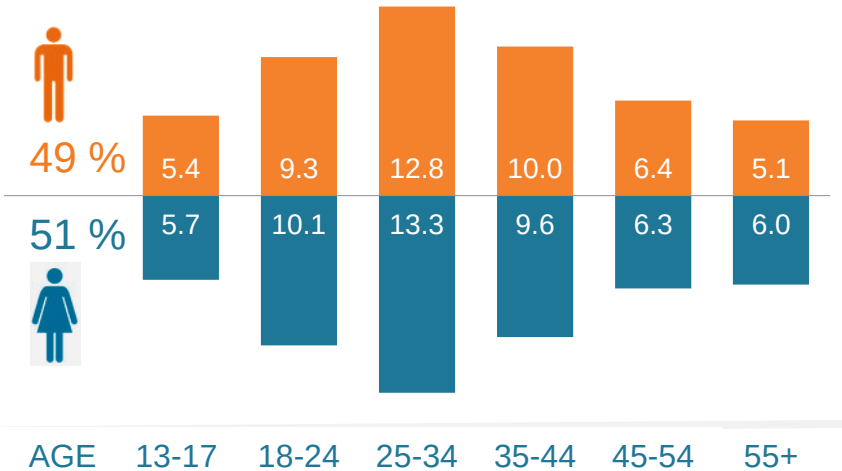
Total Mobile Audience - 49.5 million



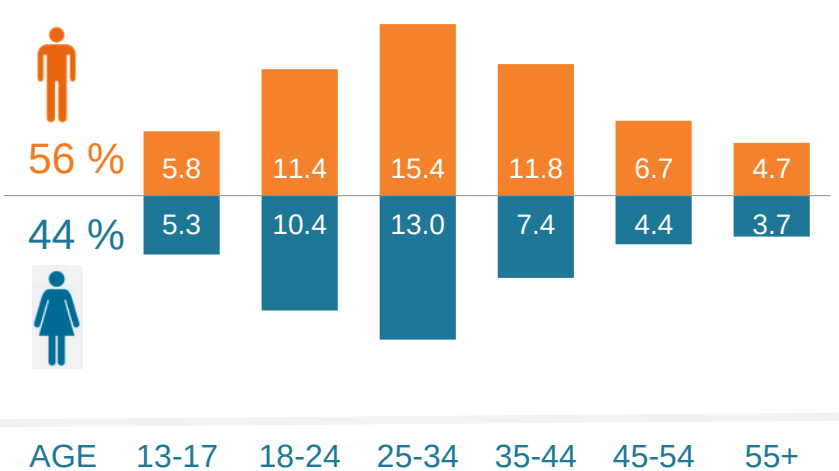
Connect to Internet - 33.9 million



Use Social Media – 22.4 million



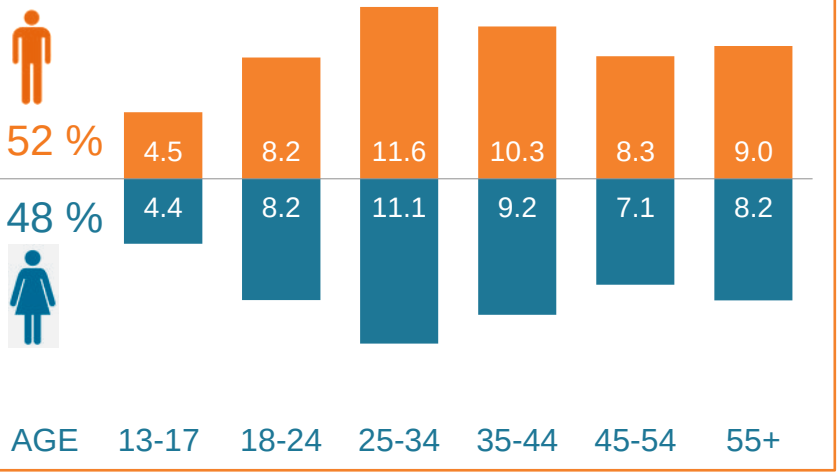
Watch Video - 12.3 million



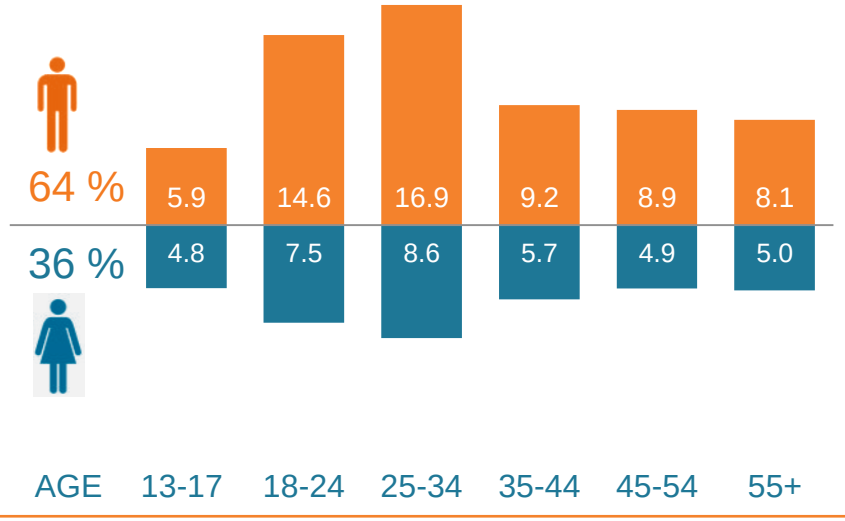
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

United Kingdom

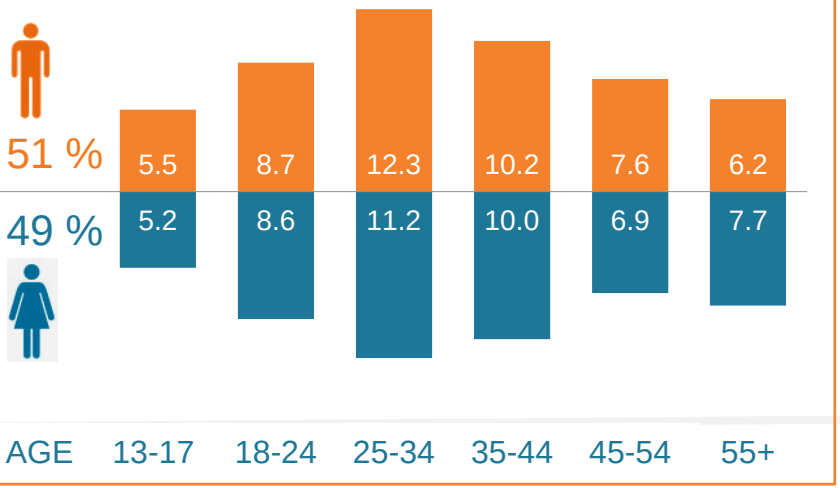
Use Application - 30.8 million



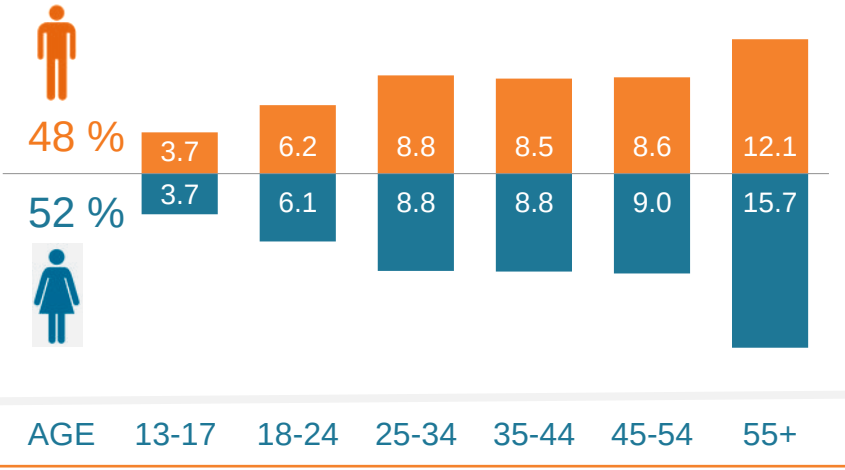
Scan QR Code - 3.3 million



Play Game - 19.9 million



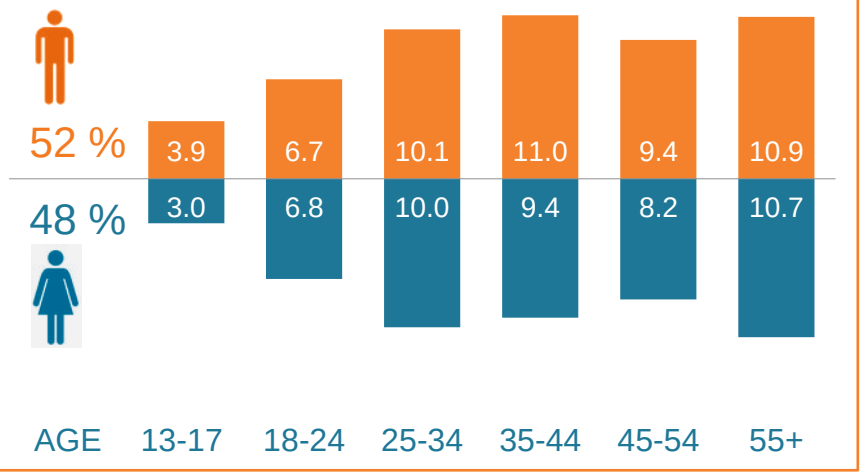
Send Text - 45.4 million



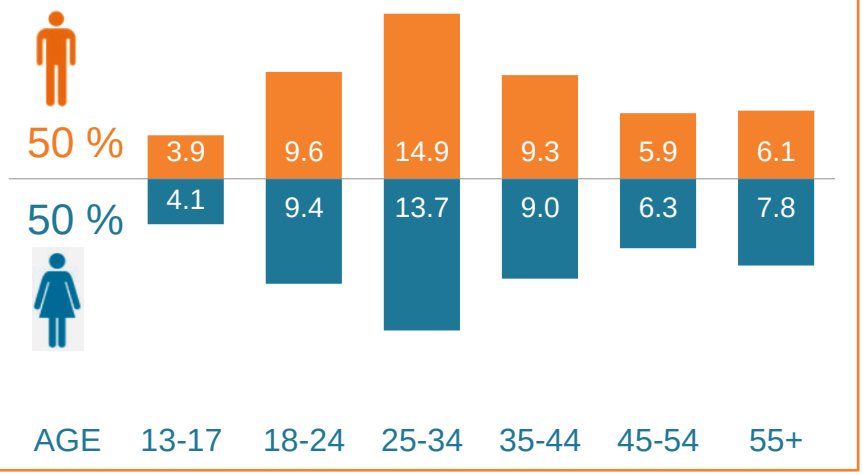
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

United Kingdom

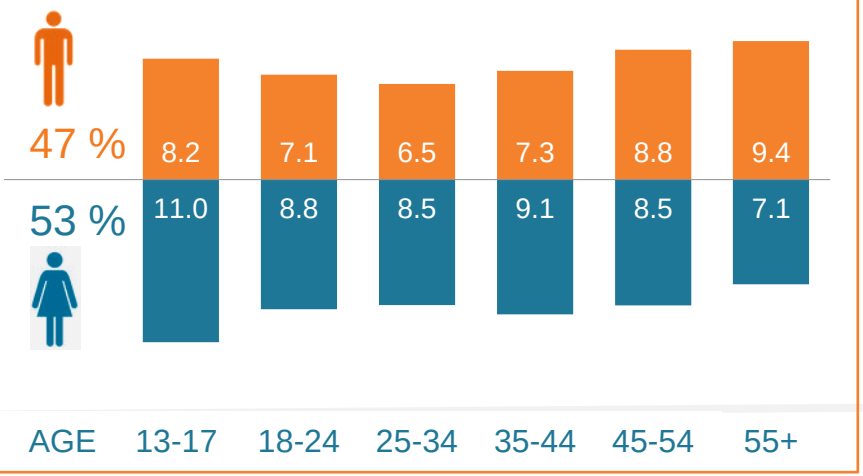
Own Android Device - 16.6 million



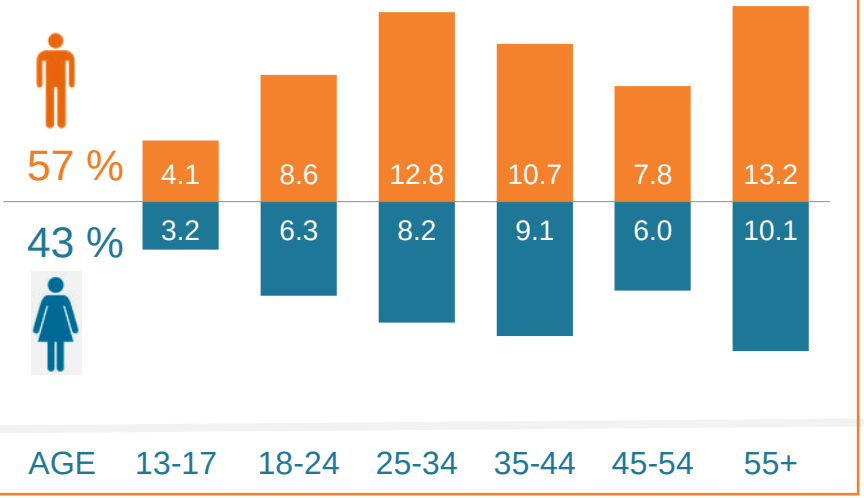
Own iPhone - 9.4 million



Own BlackBerry - 4.1 million



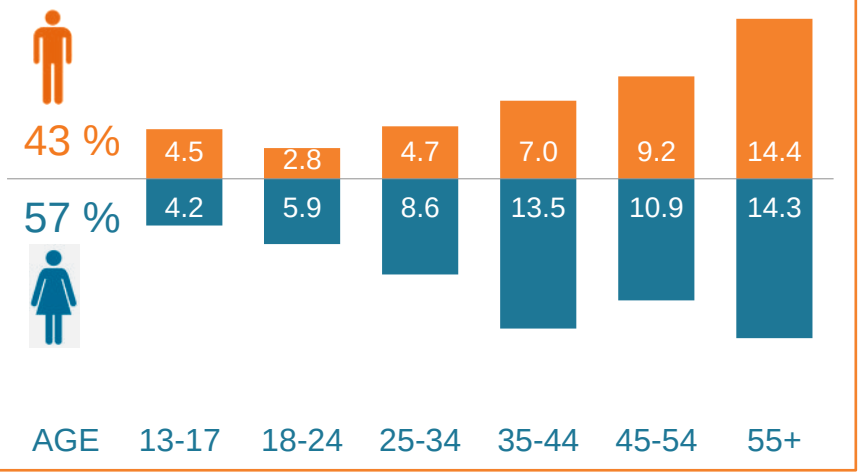
Own Windows Phone - 1.5 million



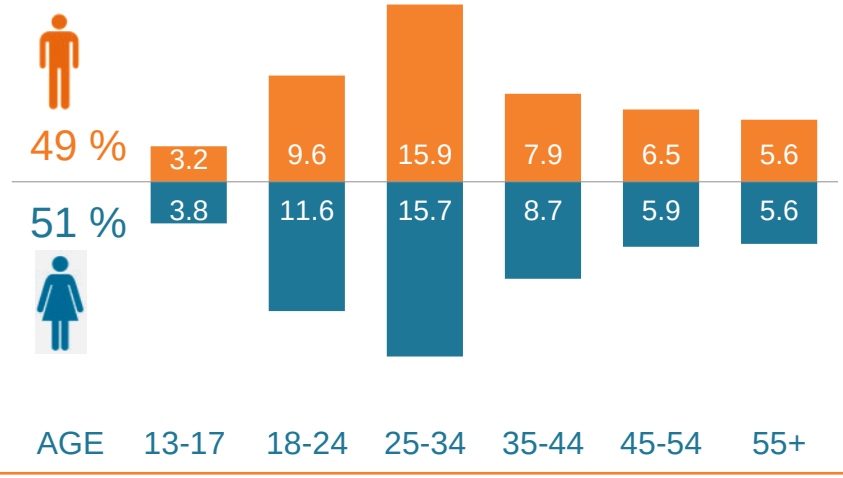
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

United Kingdom

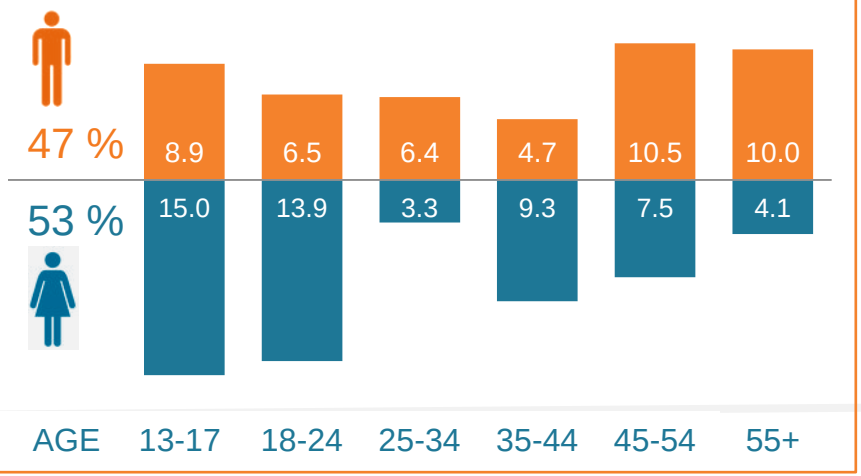
Top Samsung: Galaxy Ace S5830 - 2.1 million



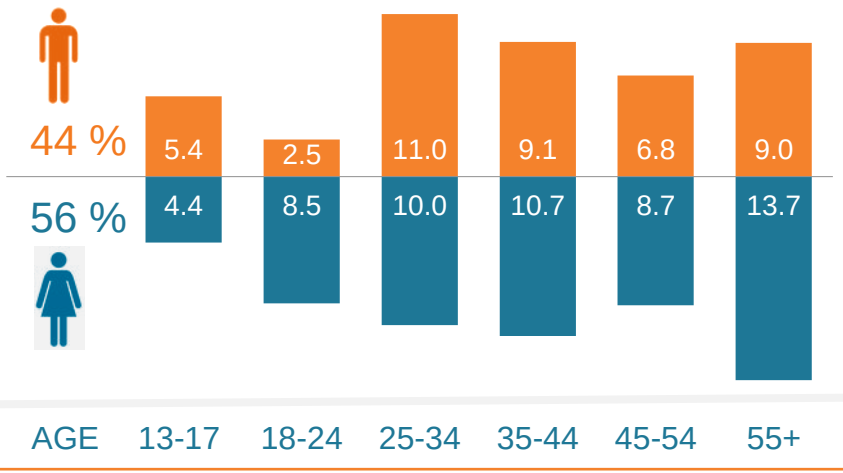
Top Apple: iPhone 4S - 3.1 million



Top Blackberry: Curve 8520 - 0.7 million



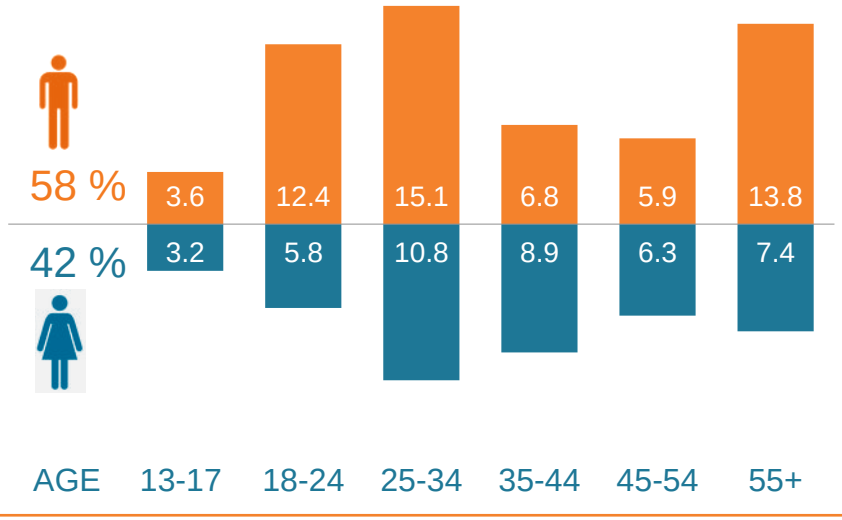
Top HTC: Wildfire S - 1.0 million



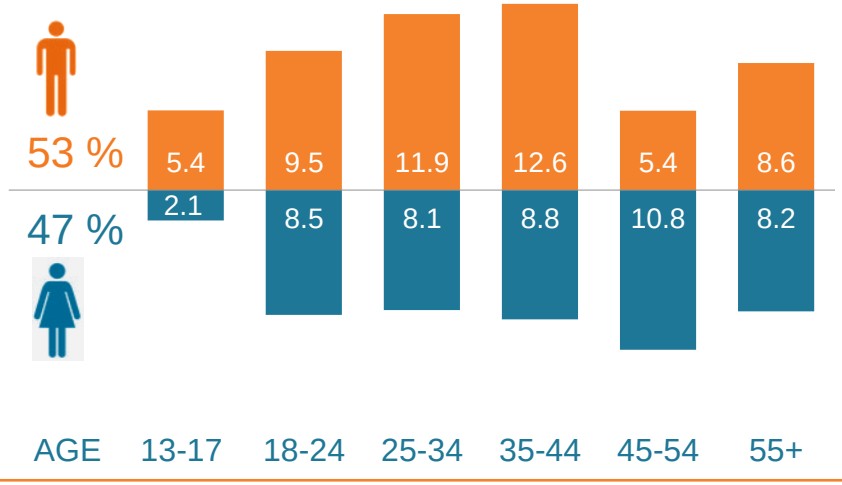
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

United Kingdom

Top Nokia: Lumia 800 - 0.4 million

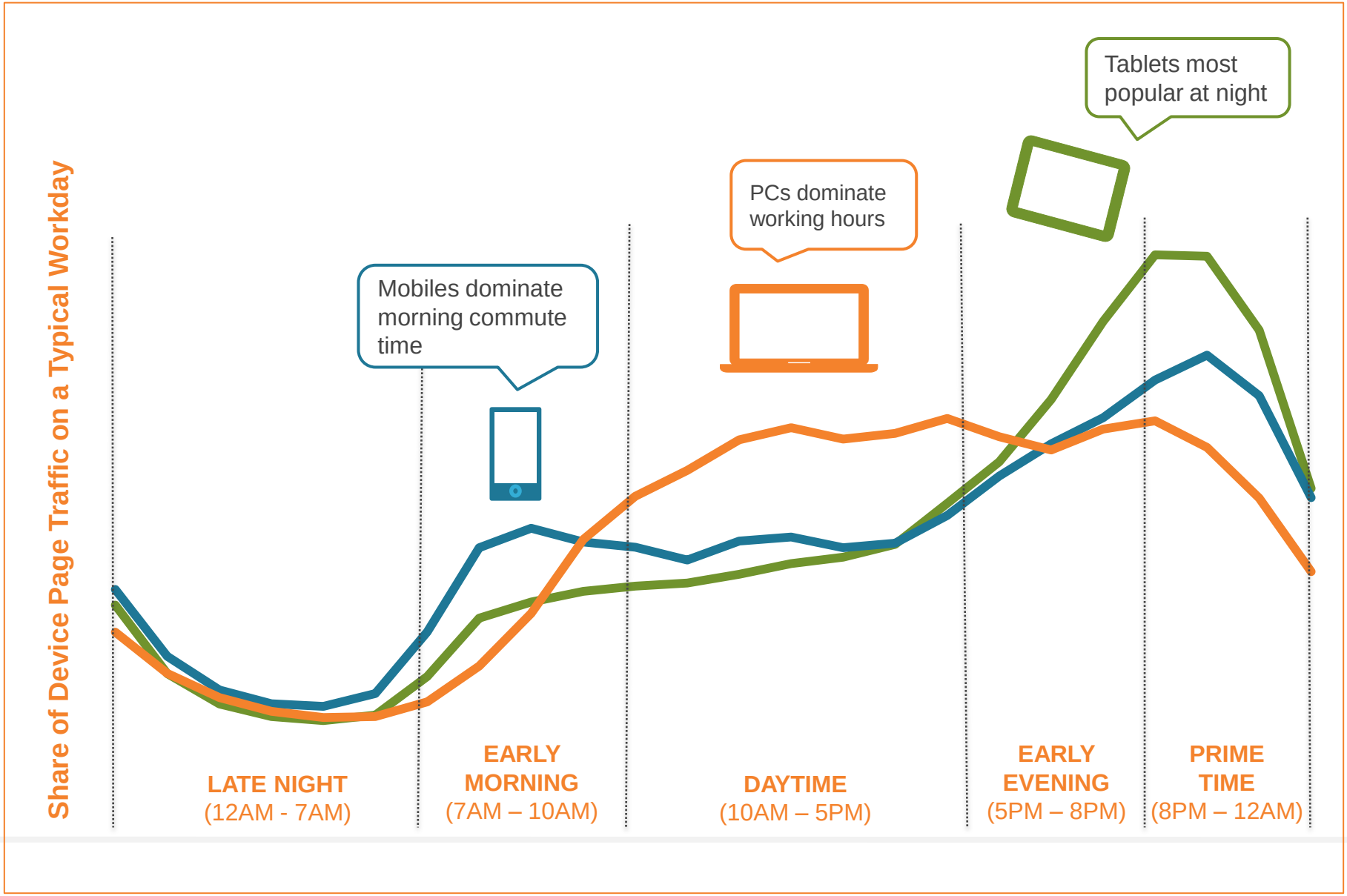


Top Sony: Xperia S - 0.2 million



Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

United Kingdom



Source: comScore Custom Analytics based on 21st Jan 2013 UK data

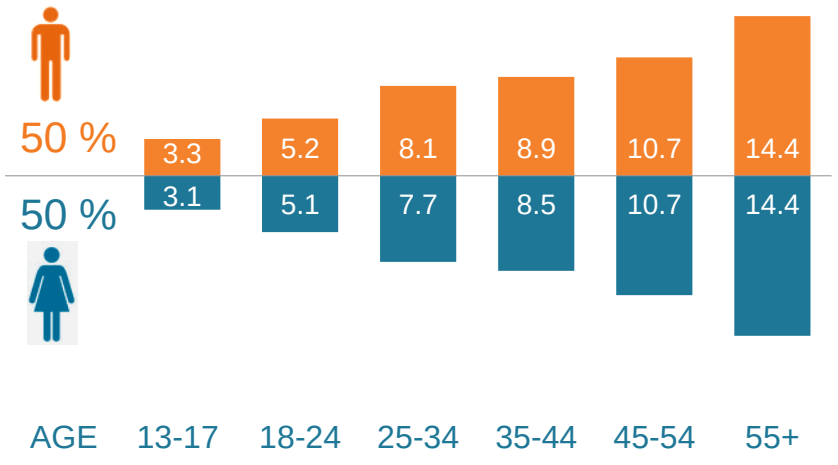


Germany

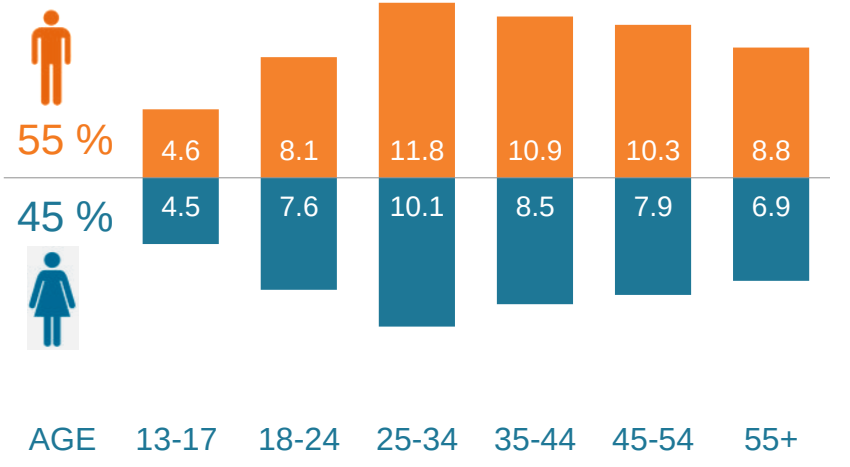


Germany

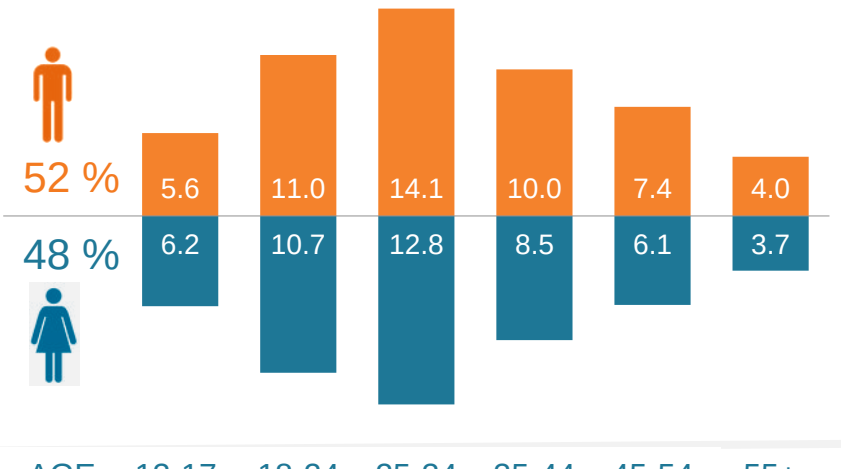
Total Mobile Audience - 61 million



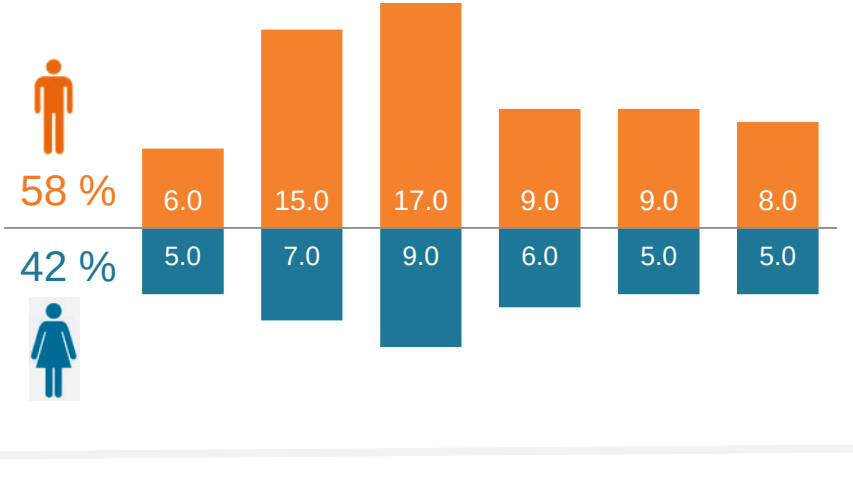
Connect to Internet - 32.9 million



Use Social Networking - 17.8 million



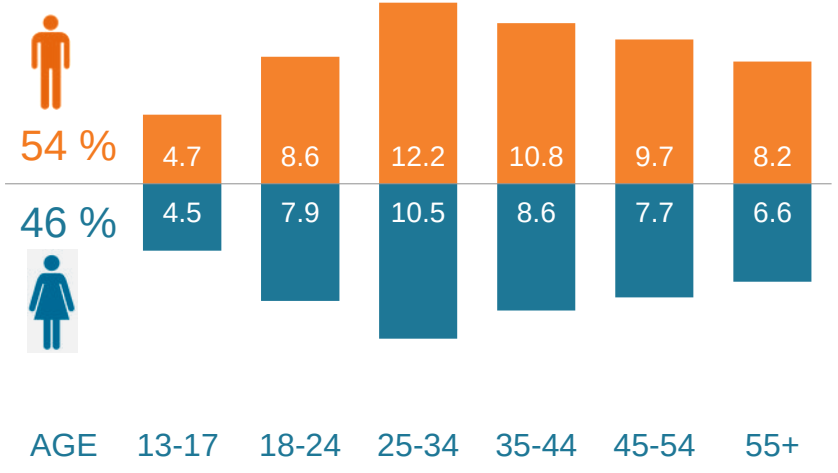
Watch Video -12.1 million



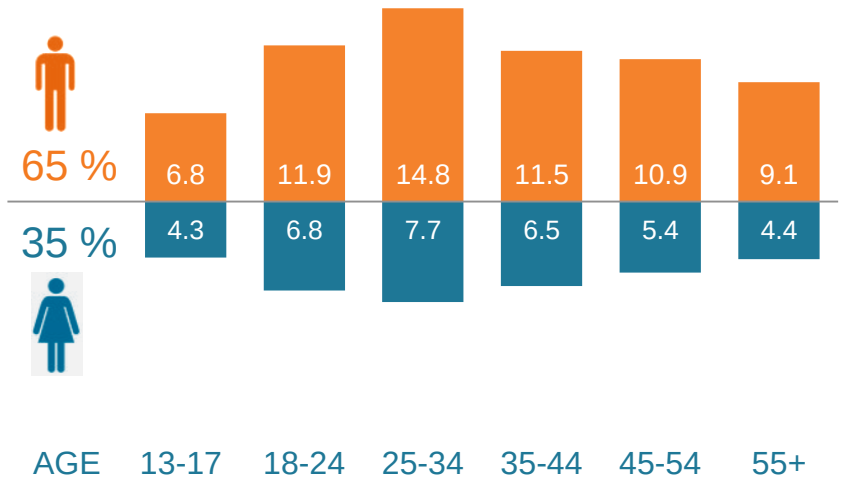
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Germany

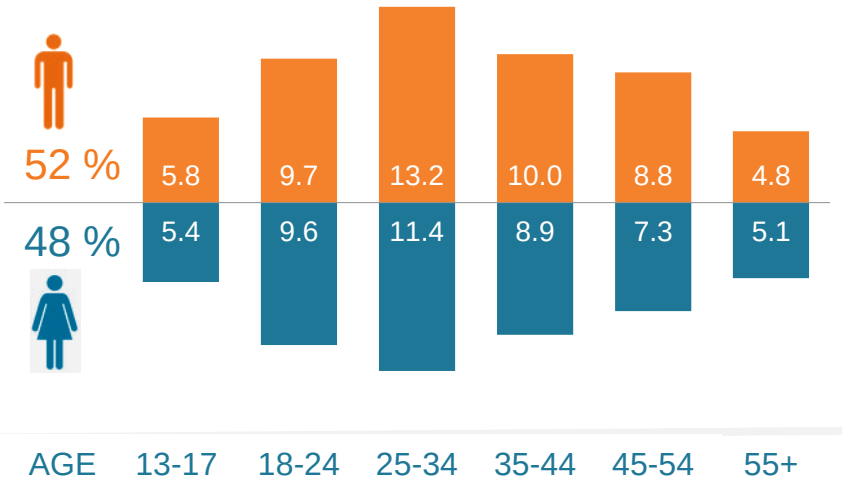
Use Application - 29.6 million



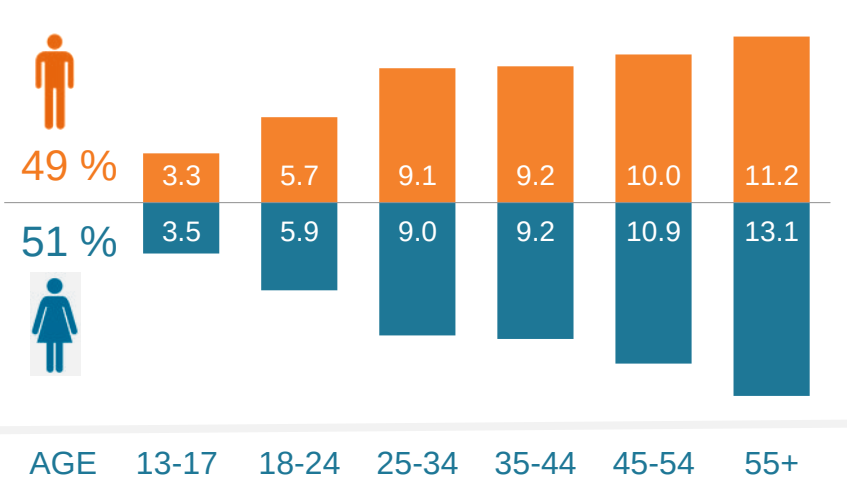
Scan QR Code - 6.1 million



Play Game - 19.4 million



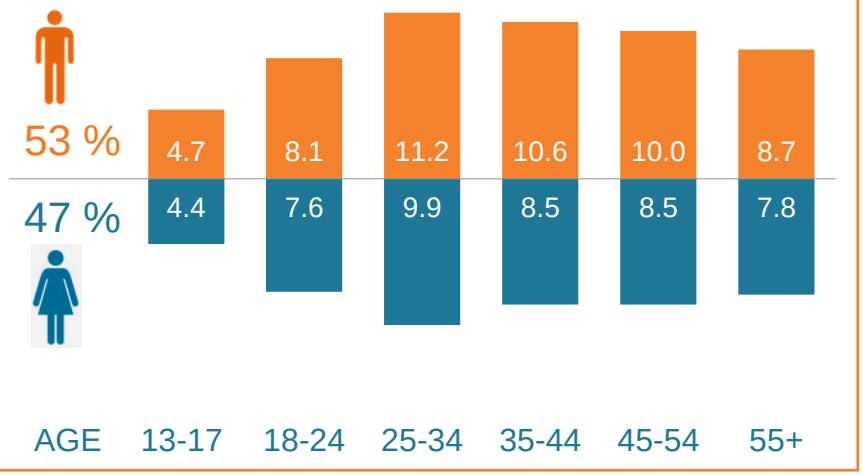
Send Text - 48.1 million



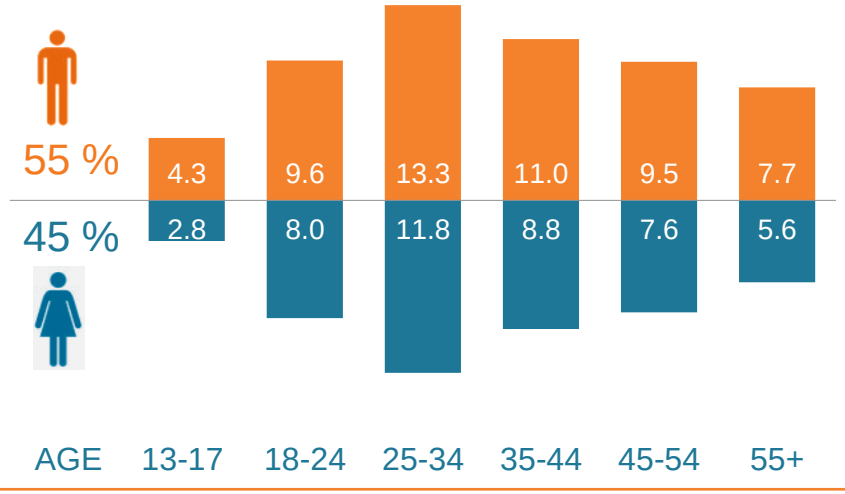
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Germany

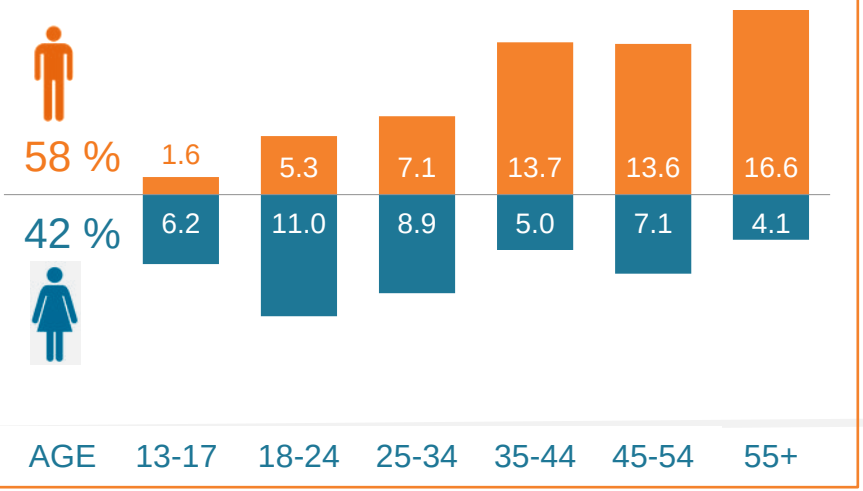
Own Android Device - 19.6 million



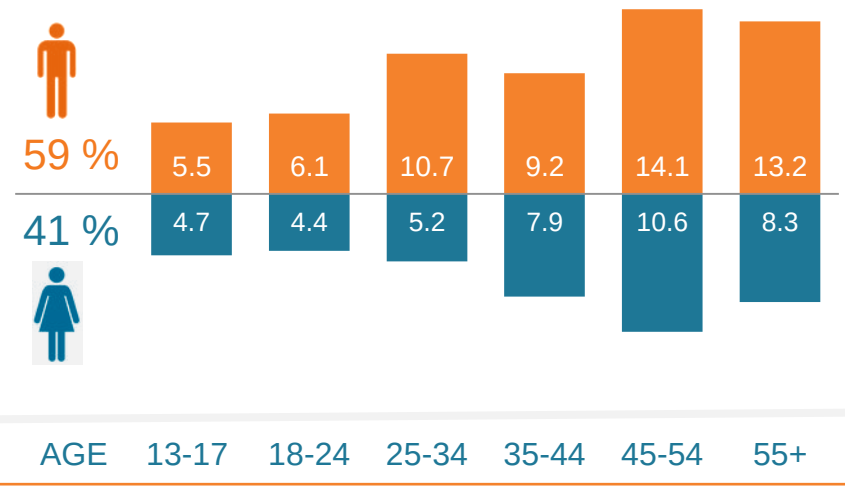
Own iPhone - 7.3 million



Own BlackBerry - 0.5 million



Own Windows Phone - 1.7 million



Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

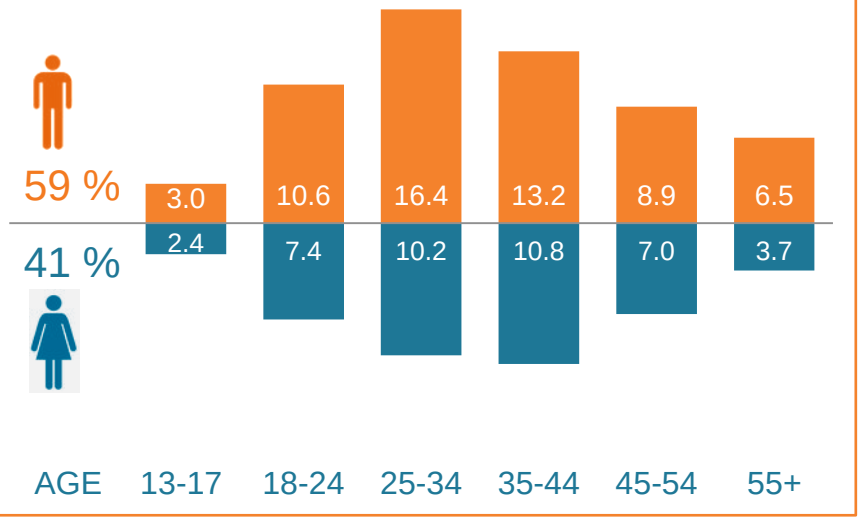
Germany



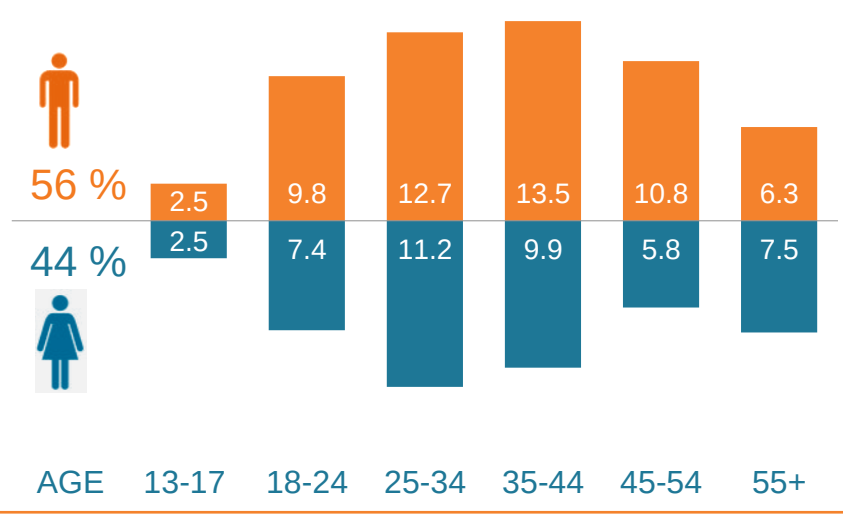
MOBILE MARKETING ASSOCIATION

comScore

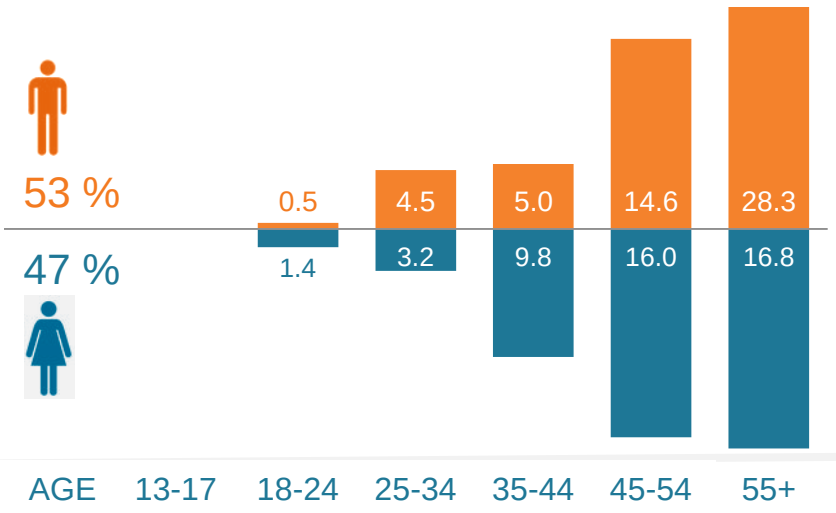
Top Samsung: Galaxy S3 - 2.4 million



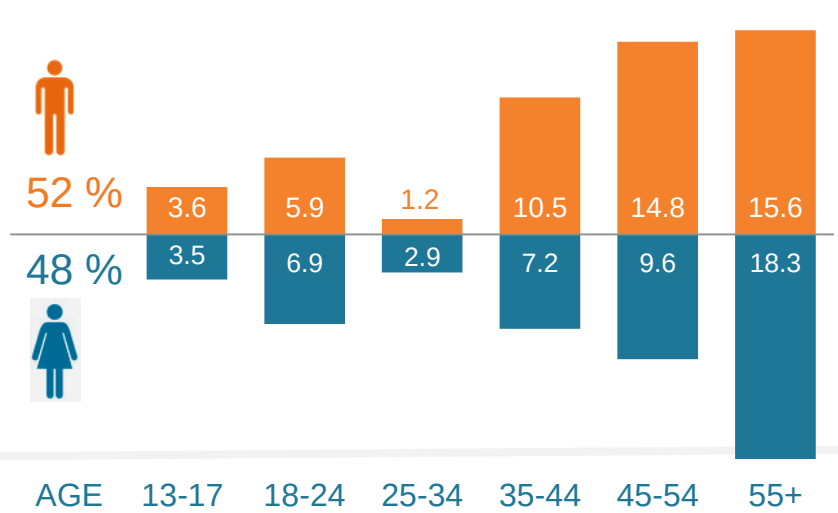
Top Apple: iPhone 4S - 2.0 million



Top Nokia: 6300 - 0.5 million



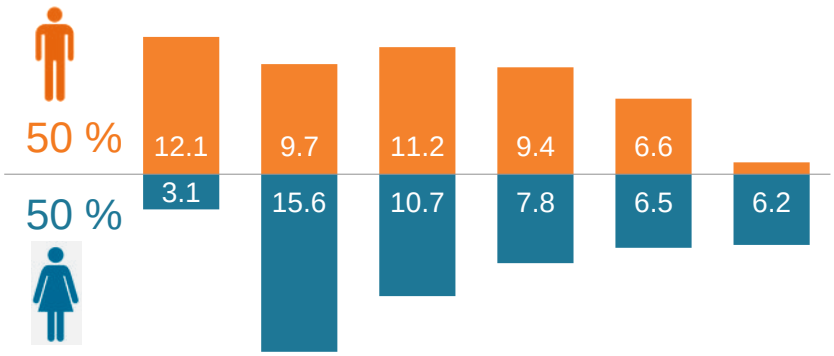
Top LG: Cookie KP500 - 0.4 million



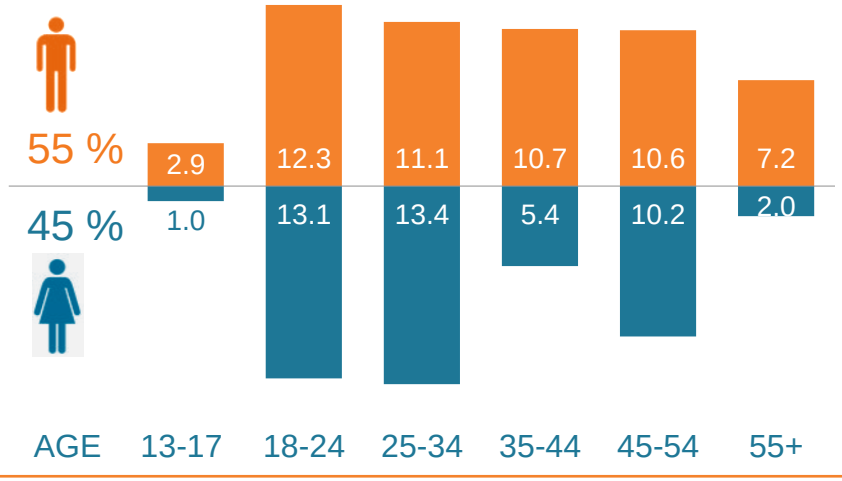
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Germany

Top Sony : SE Xperia arc S - 0.3 million



Top HTC: One S - 0.3 million



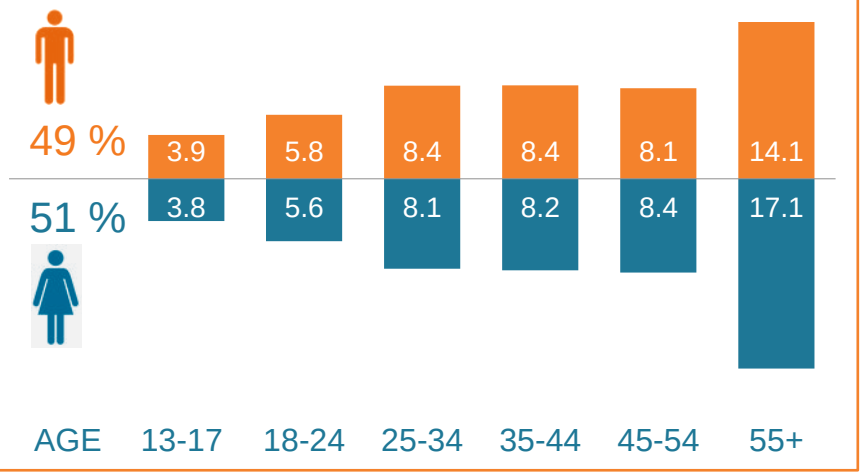
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

France

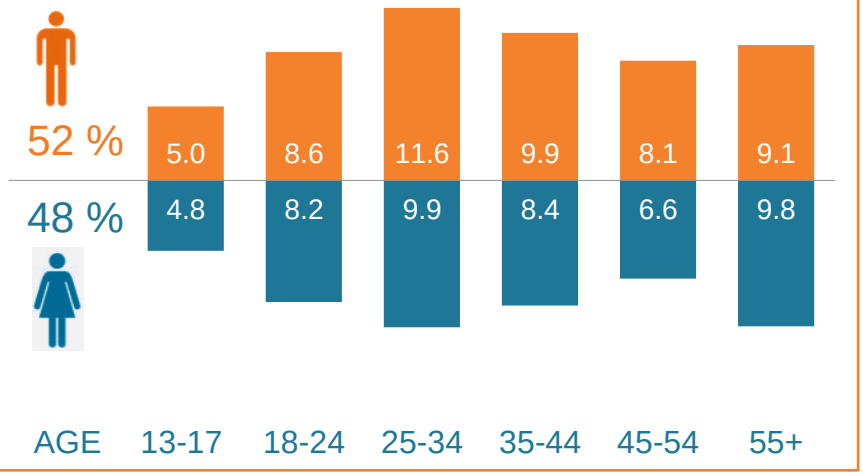


France

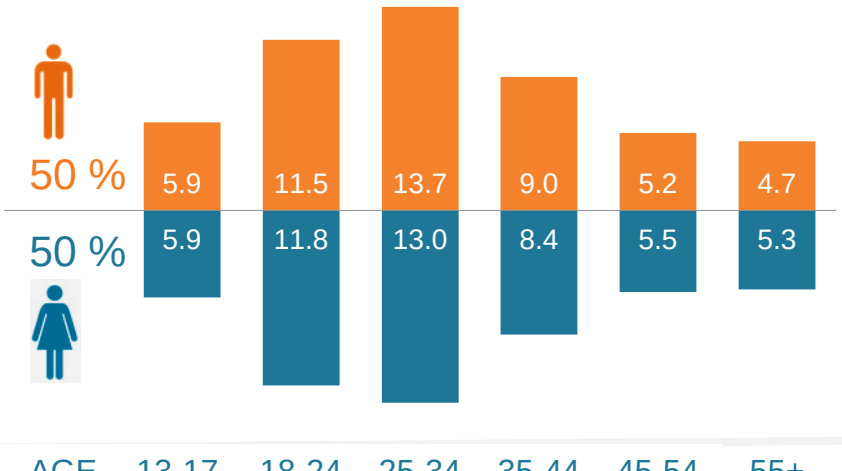
Total Mobile Audience - 47.5 million



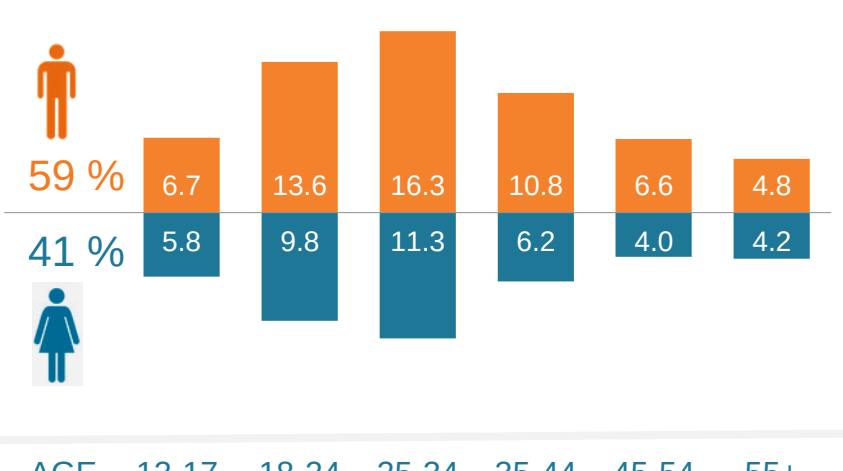
Connect to Internet - 26.3 million



Use Social Media - 14.2 million



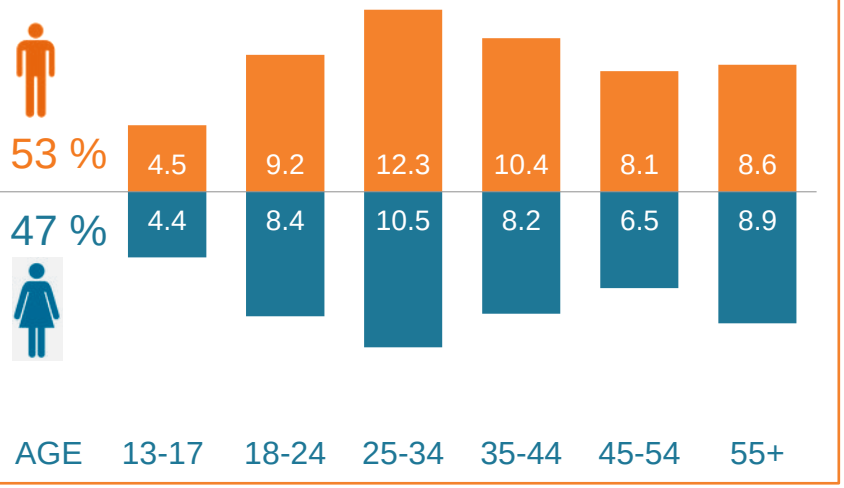
Watch Video - 8.1 million



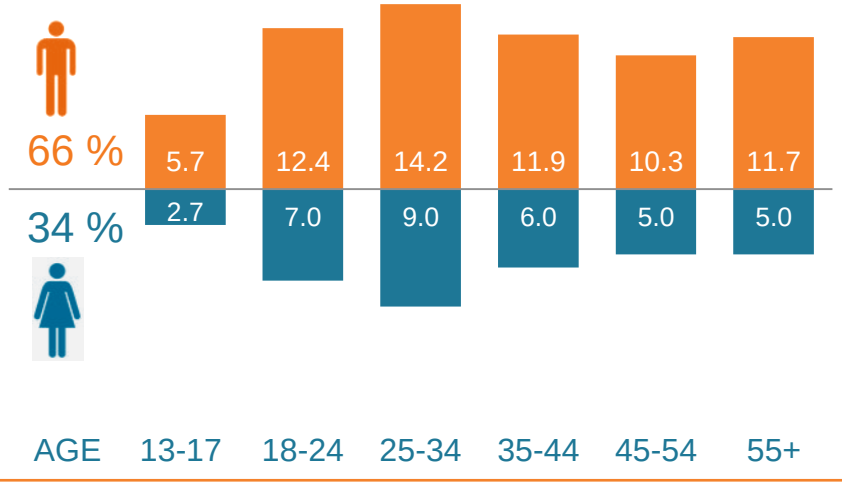
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

France

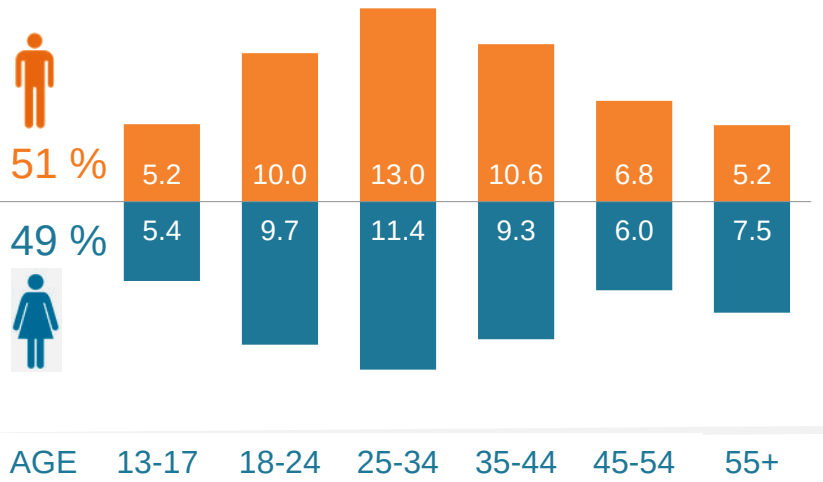
Use Application - 21.9 million



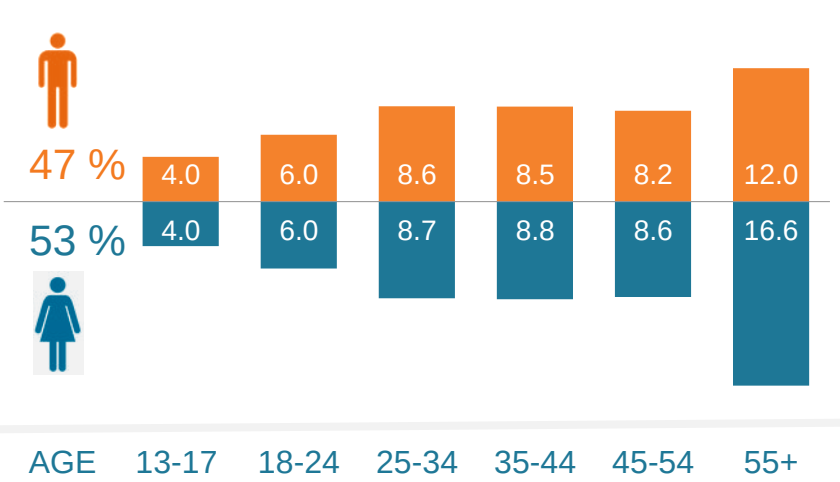
Scan QR Code - 3.4 million



Play Game - 9.1 million



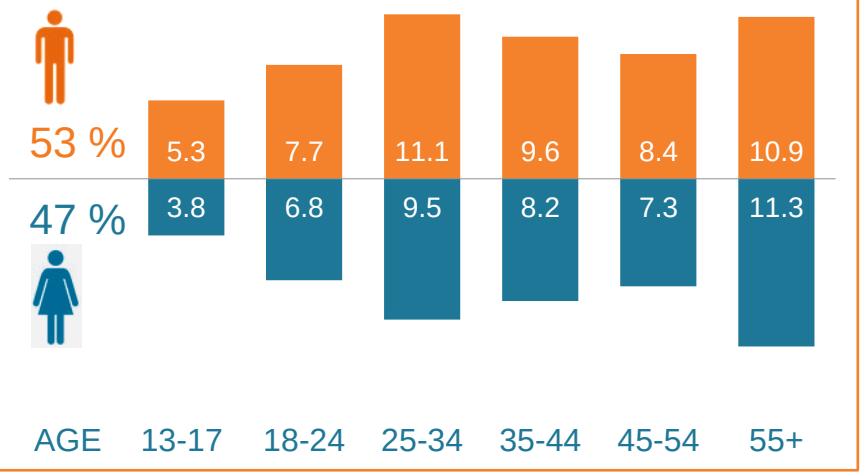
Send Text - 42.3 million



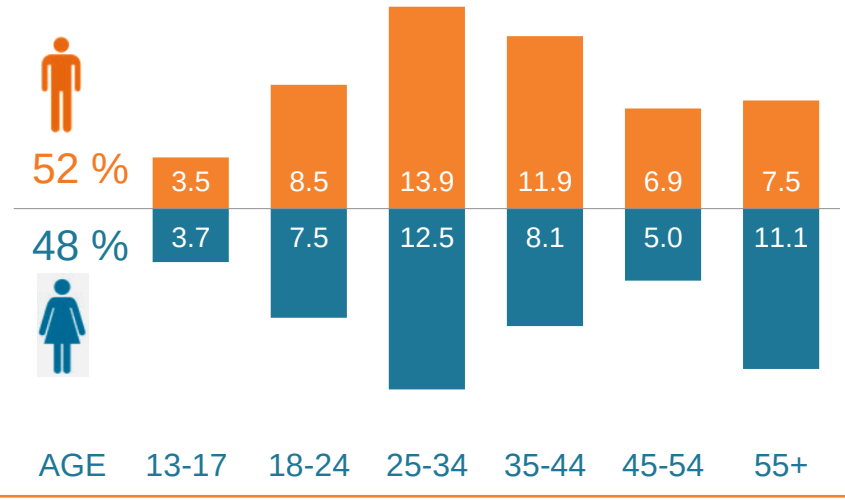
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

France

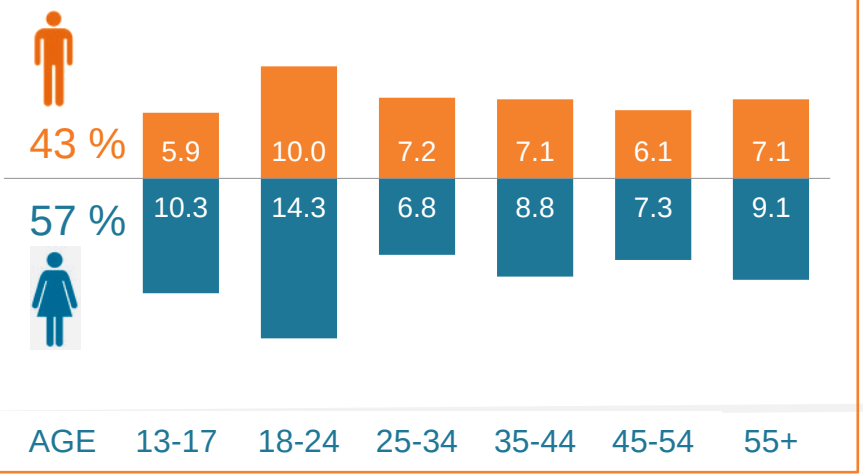
Own Android Device - 14.1 million



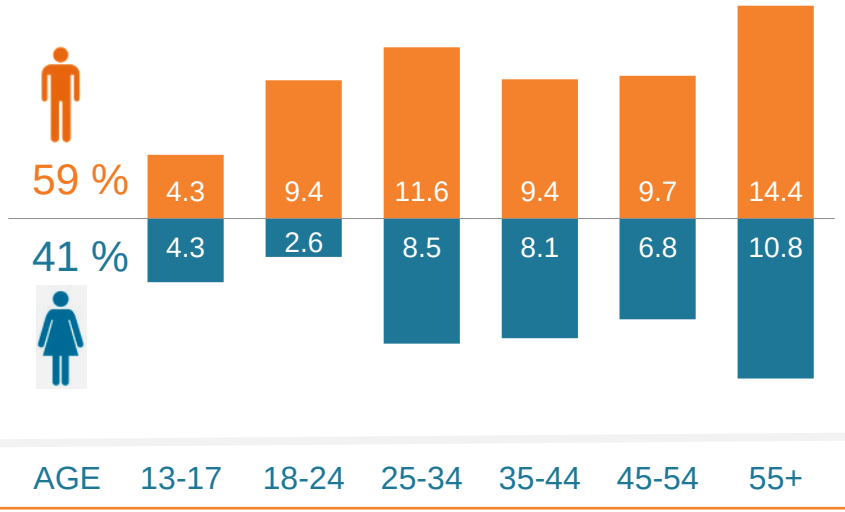
Own iPhone - 6.0 million



Own BlackBerry - 2.1 million



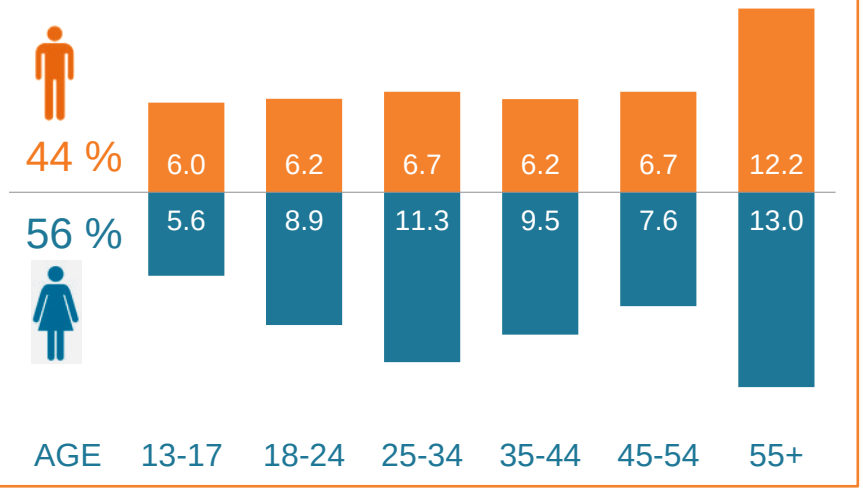
Own Windows Phone - 1.3 million



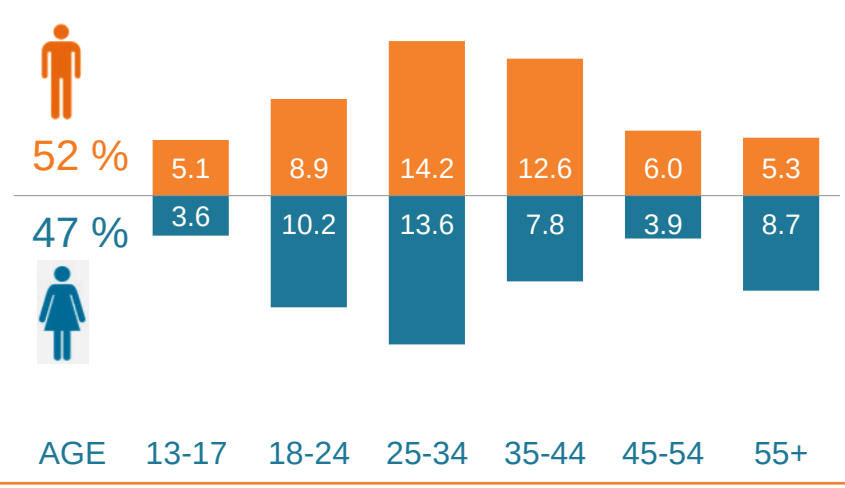
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

France

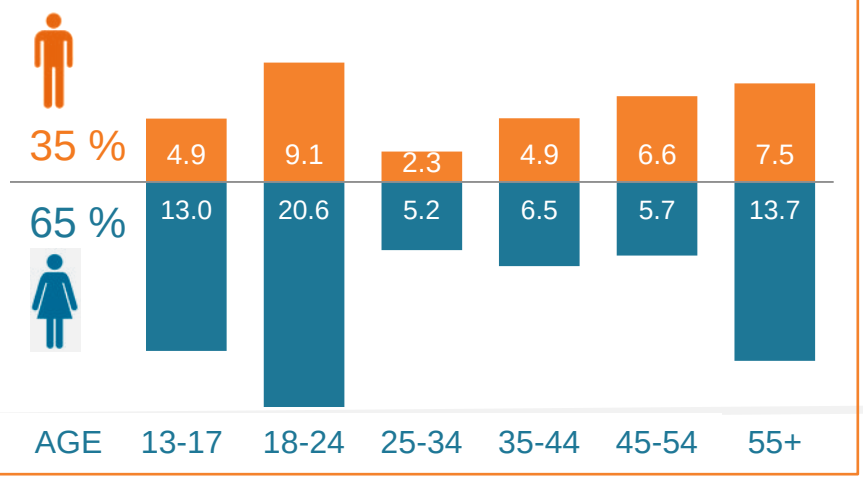
Top Samsung: Galaxy Ace S5830 - 2.4 million



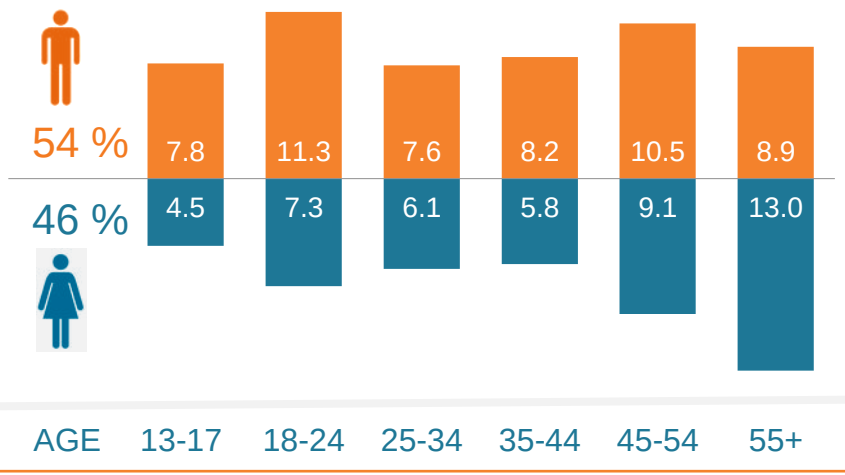
Top Apple: iPhone 4 - 2.0 million



Top Blackberry: Curve 8520 - 0.6 million



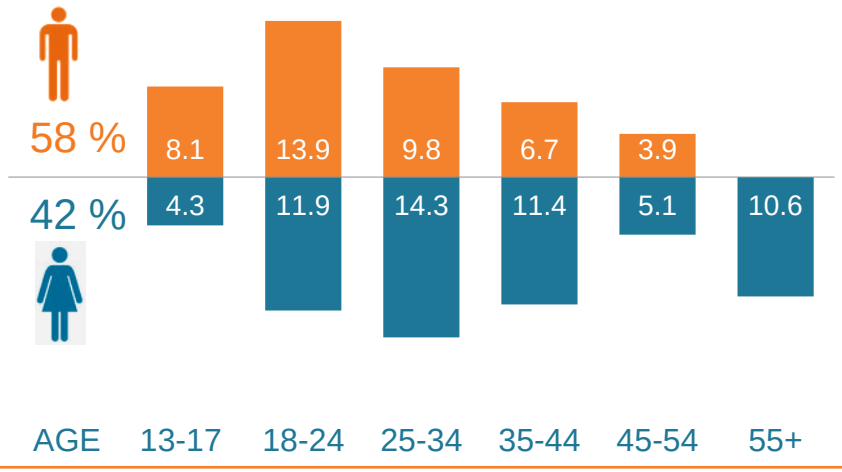
Top LG: Optimus L7 P700 - 0.3 million



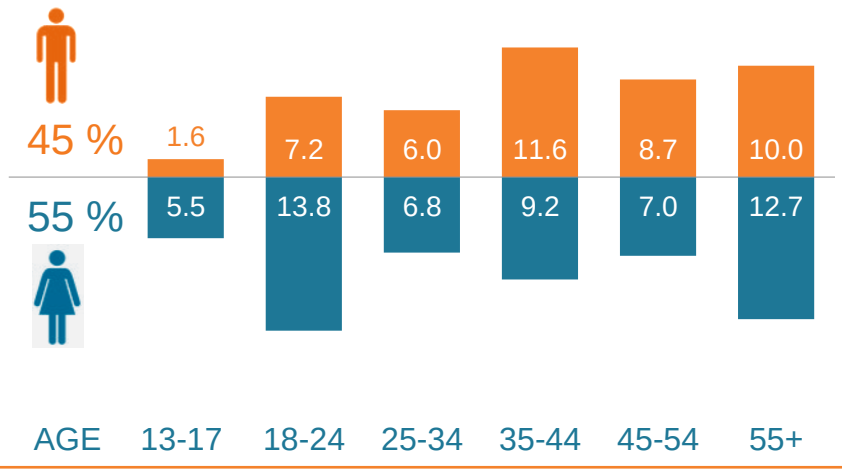
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

France

Top Sony: Xperia U - 0.2 million



Top HTC: One S - 0.2 million



Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

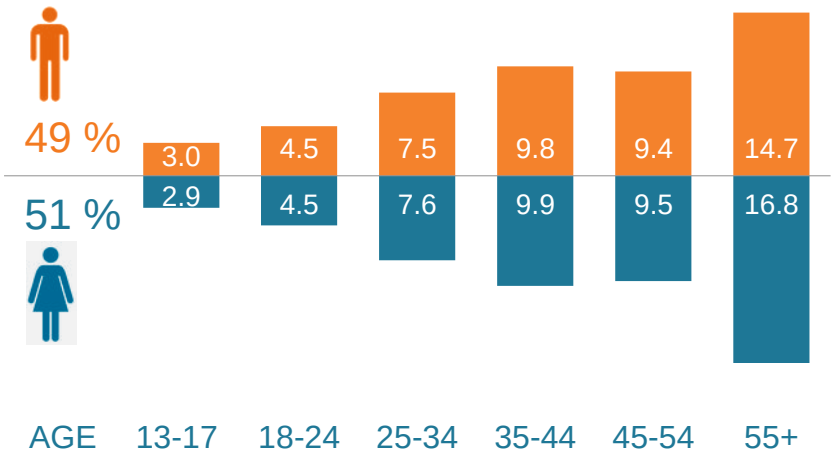


Italy

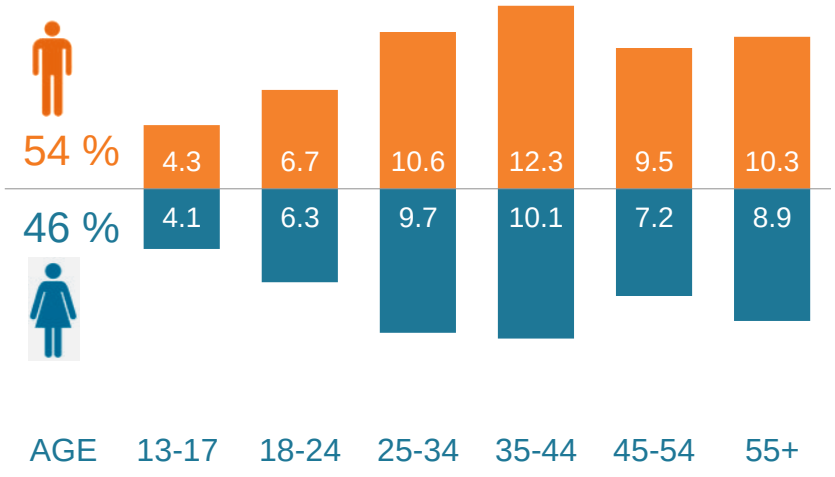


Italy

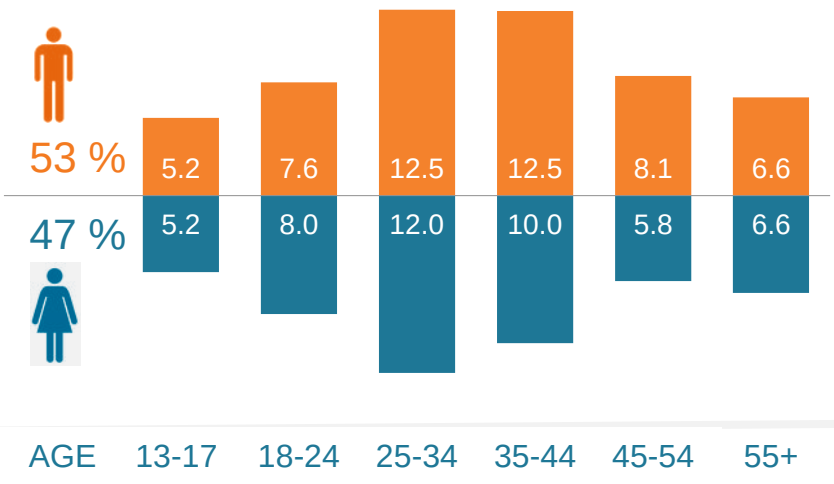
Total Mobile Audience - 48.0 million



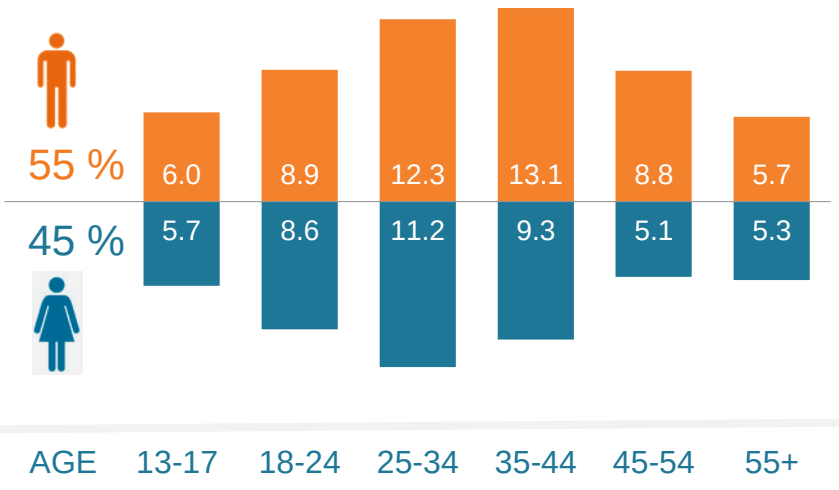
Connect to Internet - 27.1 million



Use Social Media - 15.7 million



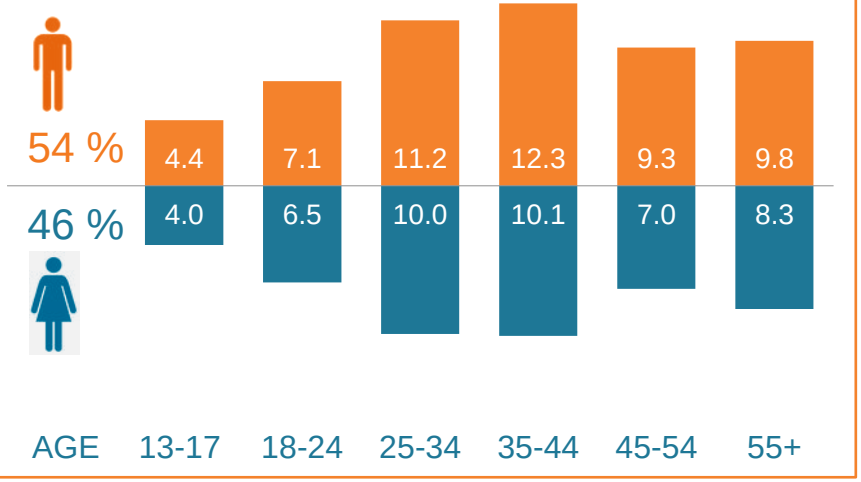
Watch Video - 10.5 million



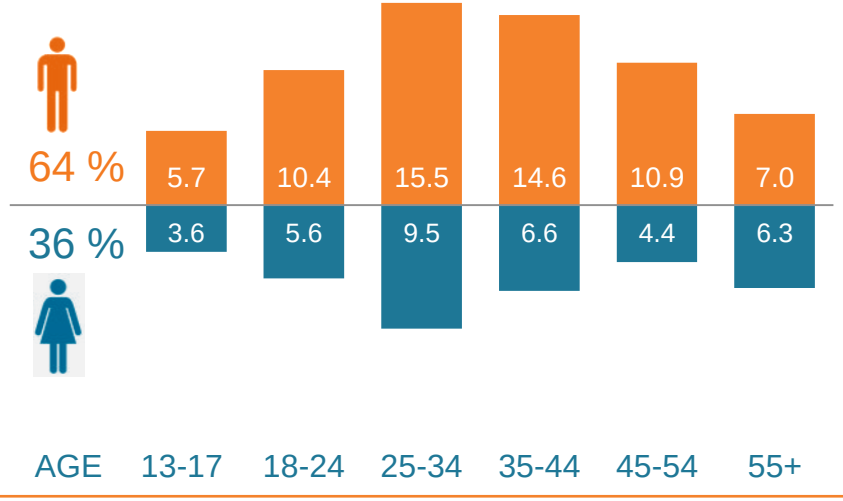
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Italy

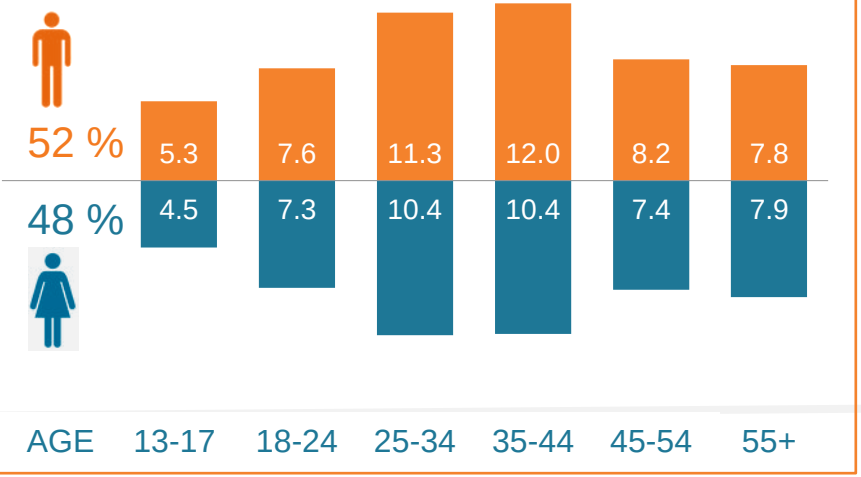
Use Application - 23.2 million



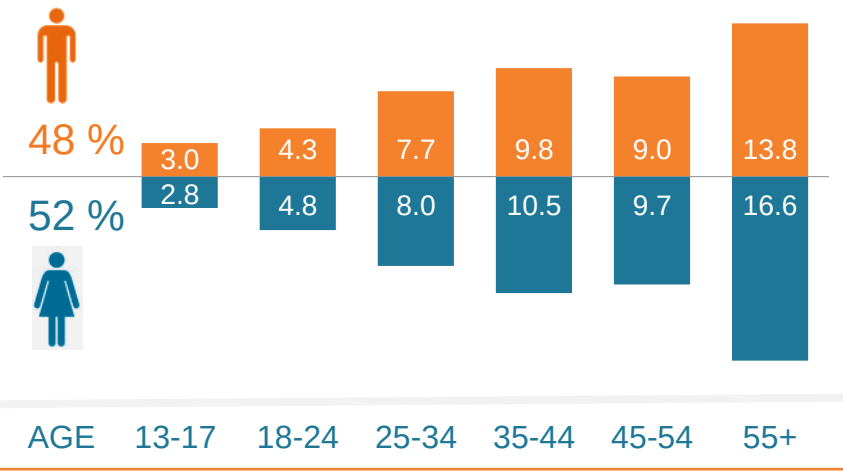
Scan QR Code - 3.4 million



Play Game - 17.5 million



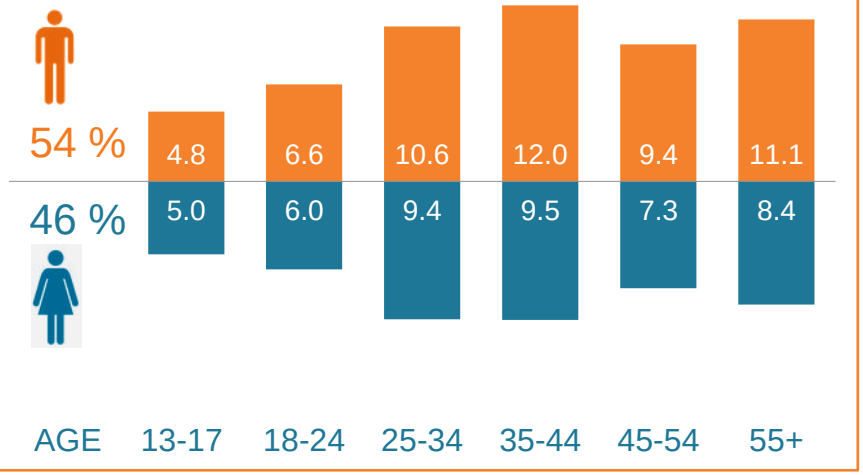
Send Text - 40.0 million



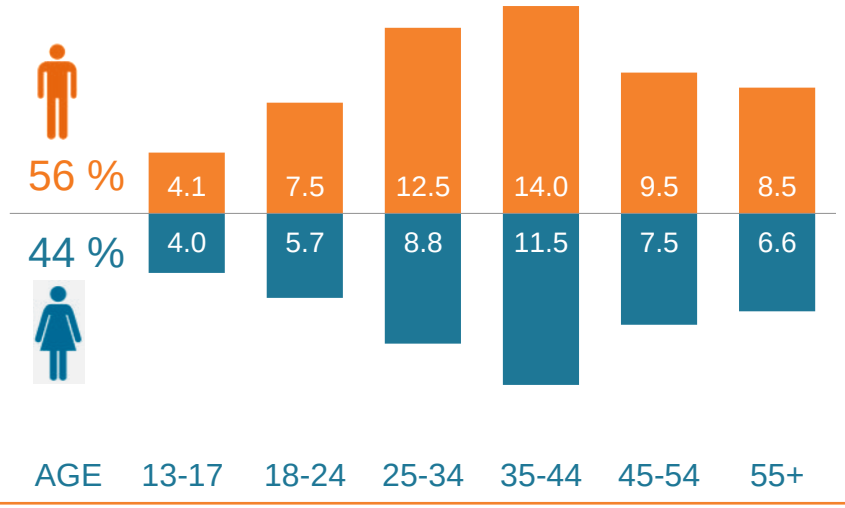
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Italy

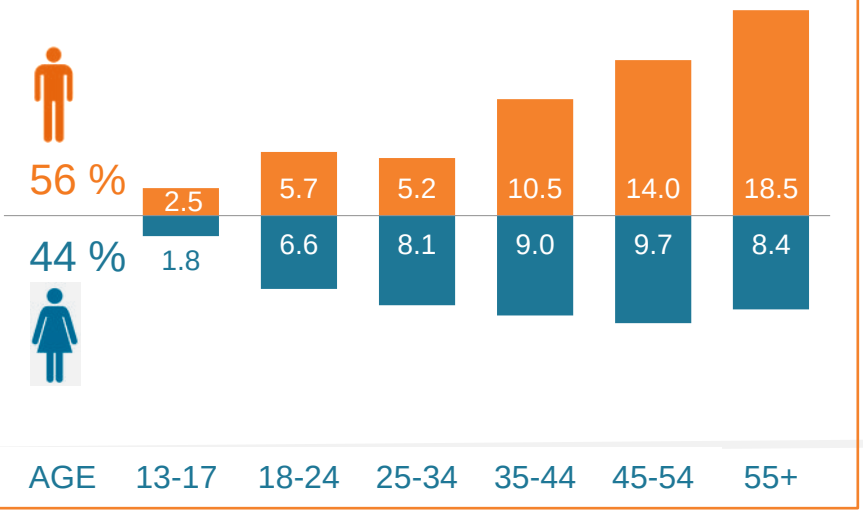
Own Android Device - 11.8 million



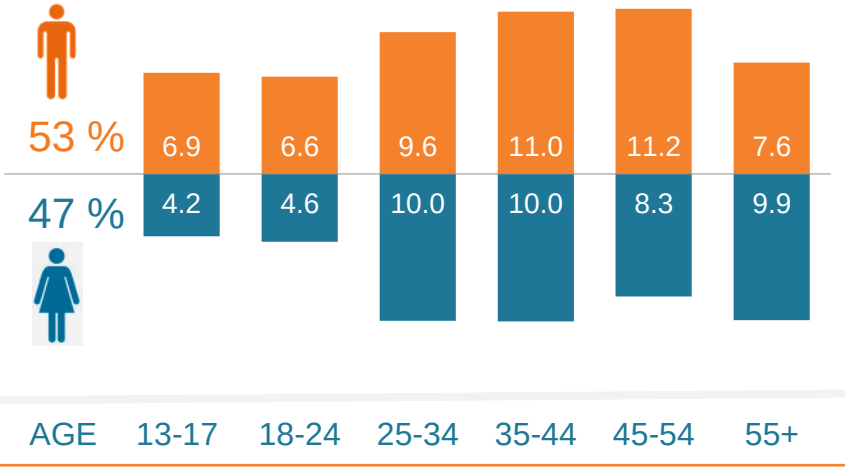
Own iPhone - 4.3 million



Own BlackBerry - 1.2 million



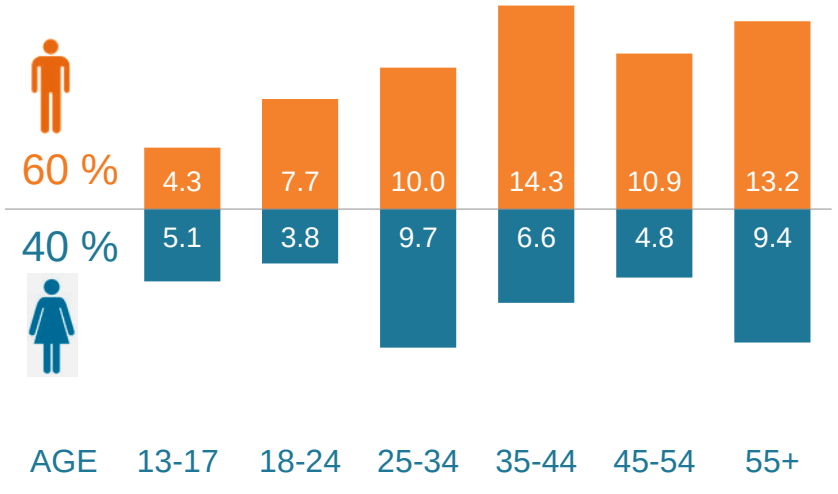
Own Windows Phone - 2.2 million



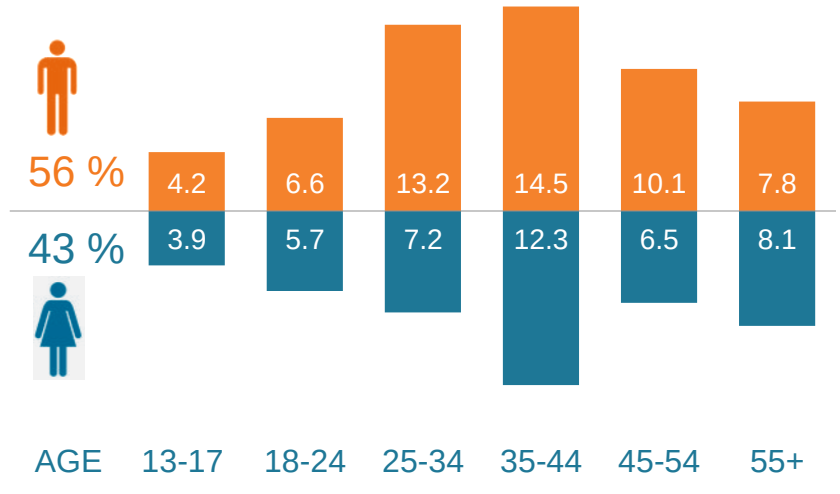
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Italy

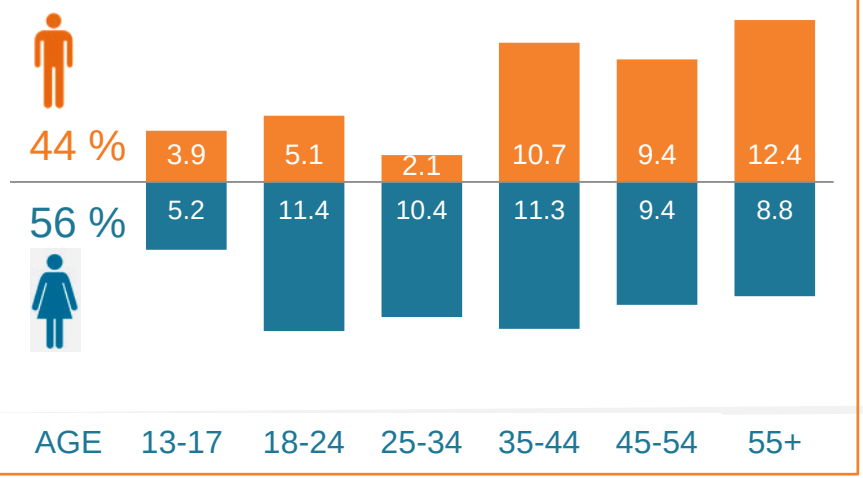
Top Samsung: Galaxy SII - 1.2 million



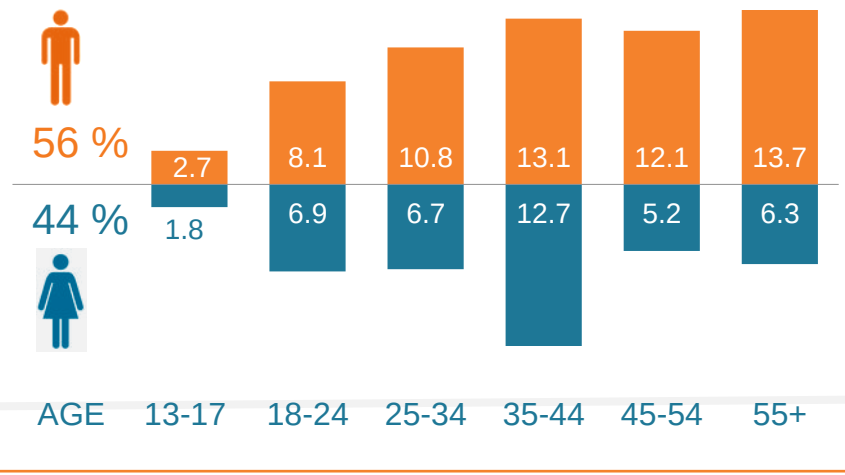
Top Apple: iPhone 4 - 1.4 million



Top Blackberry: Curve 8520 - 0.3 million



Top Nokia: 5800 - 0.7 million



Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

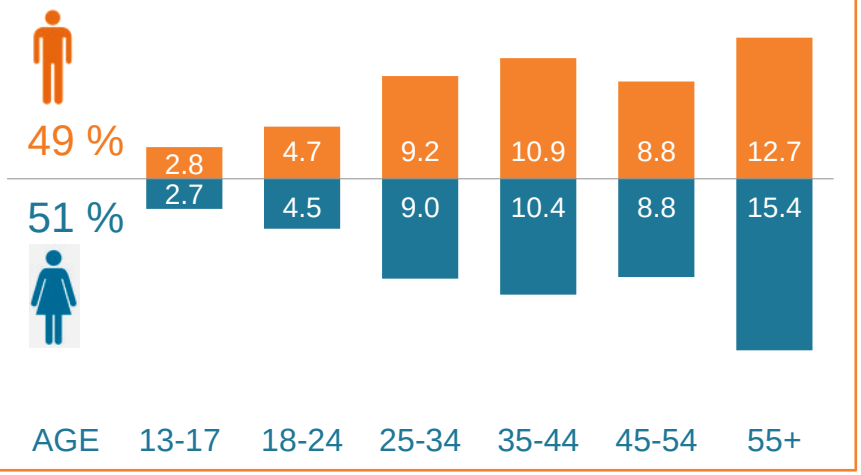


Spain

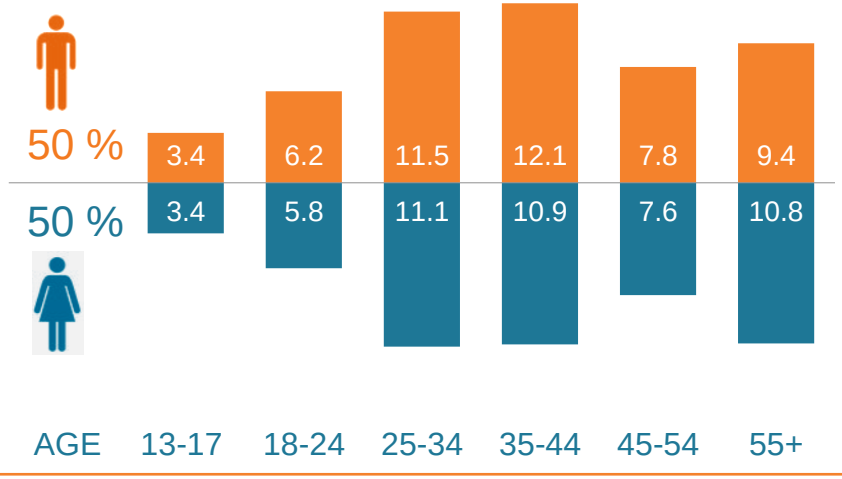


Spain

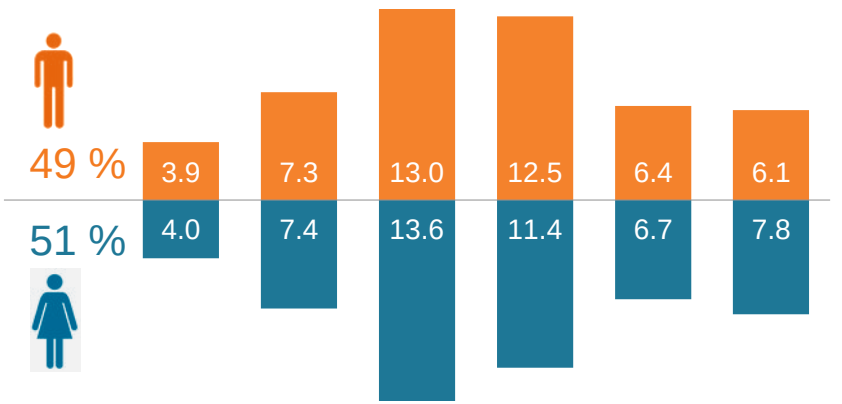
Total Mobile Audience - 35.0 million



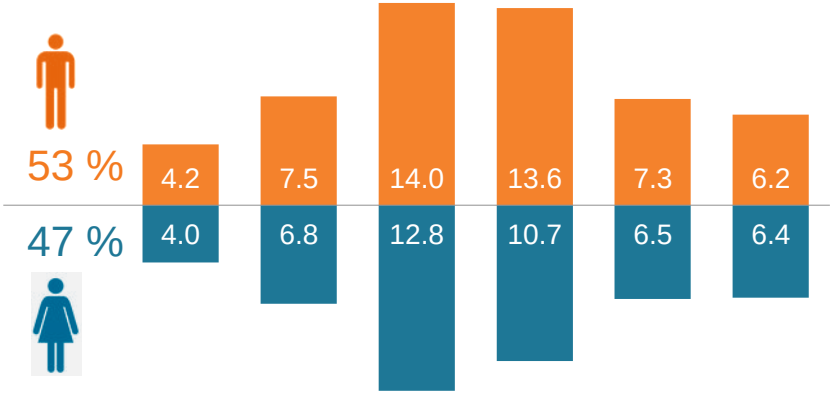
Connect to Internet – 24.6 million



Use Social Media - 15.3 million



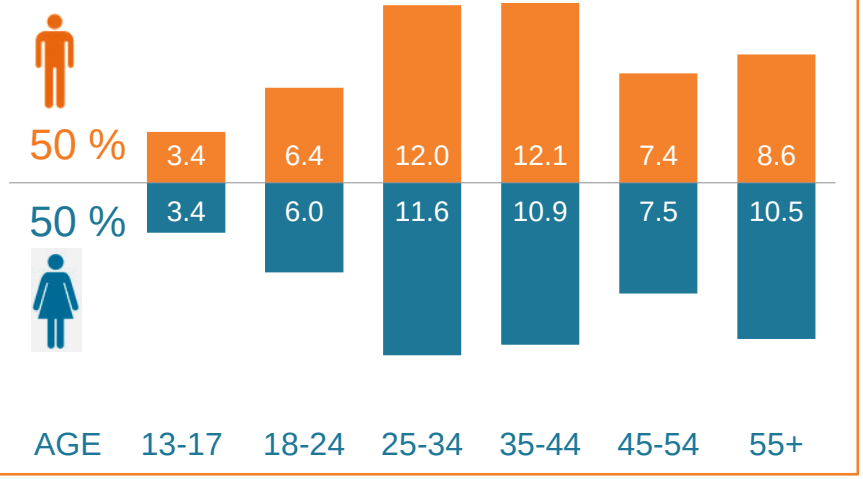
Watch Video - 10.3 million



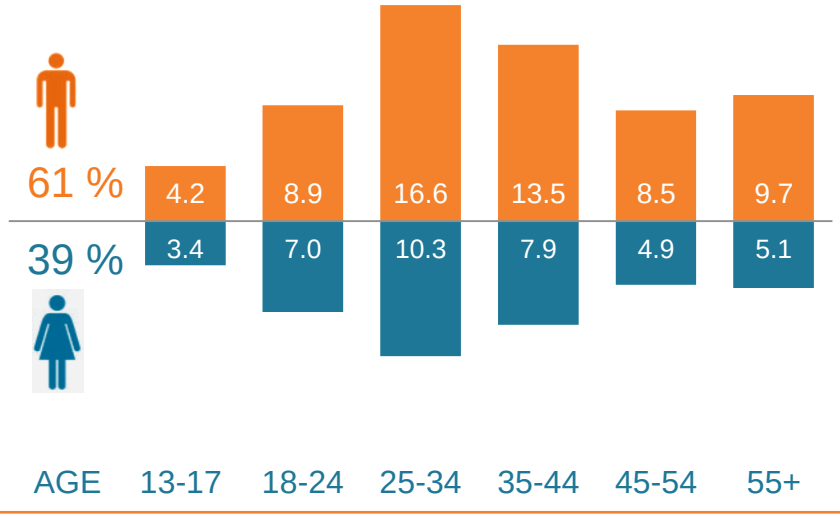
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Spain

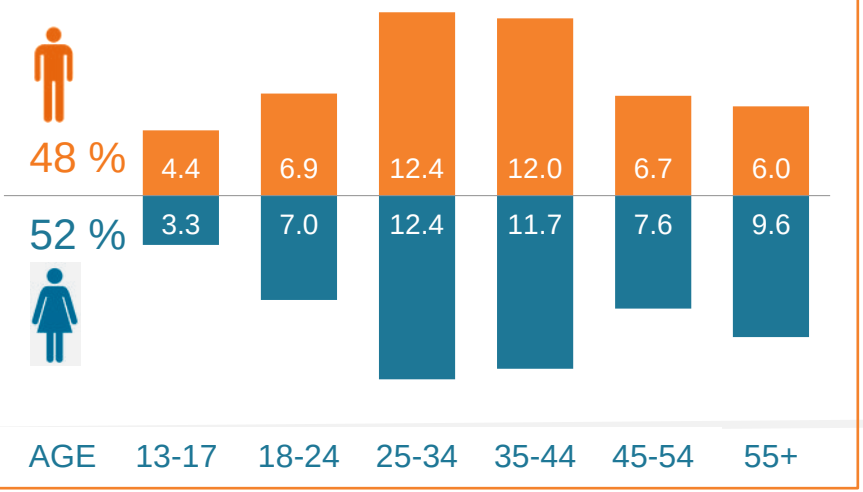
Use Application - 22.2 million



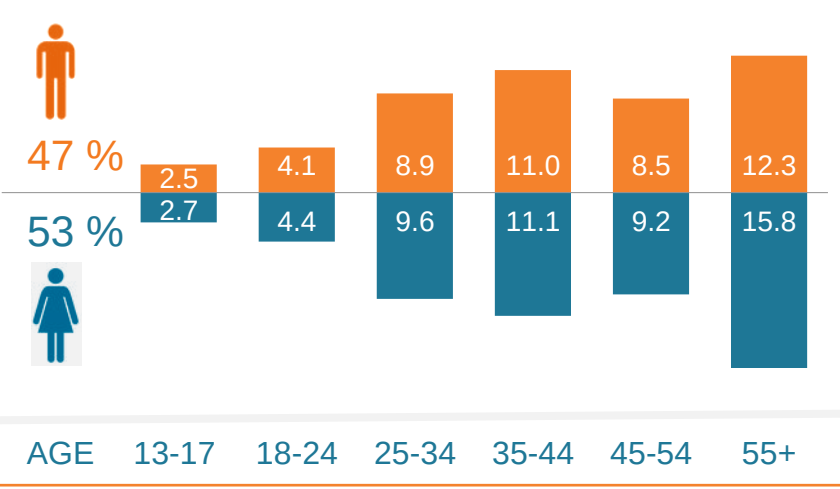
Scan QR Code - 3.2 million



Play Game - 12.8 million



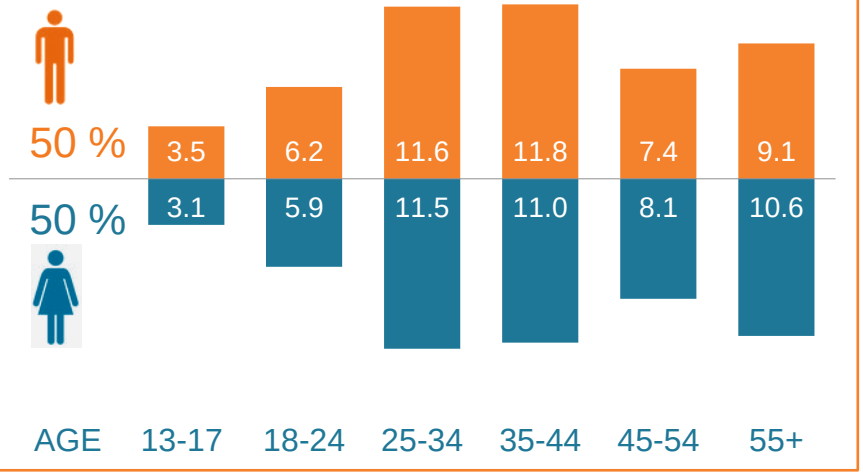
Send Text - 25.3 million



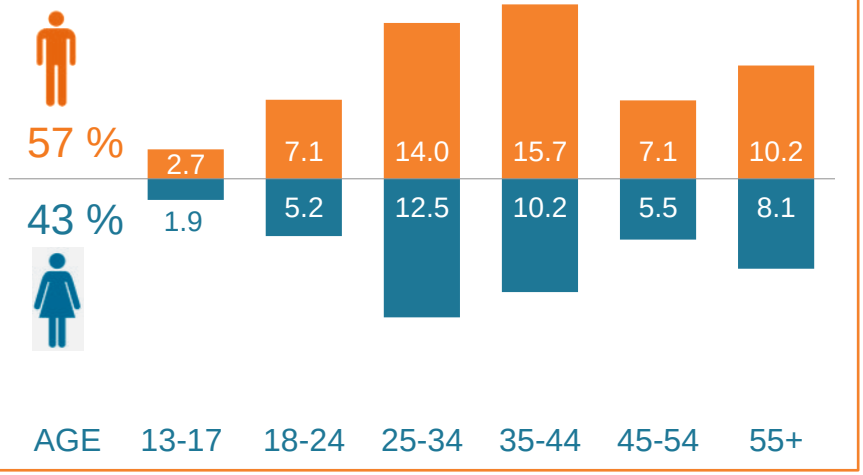
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Spain

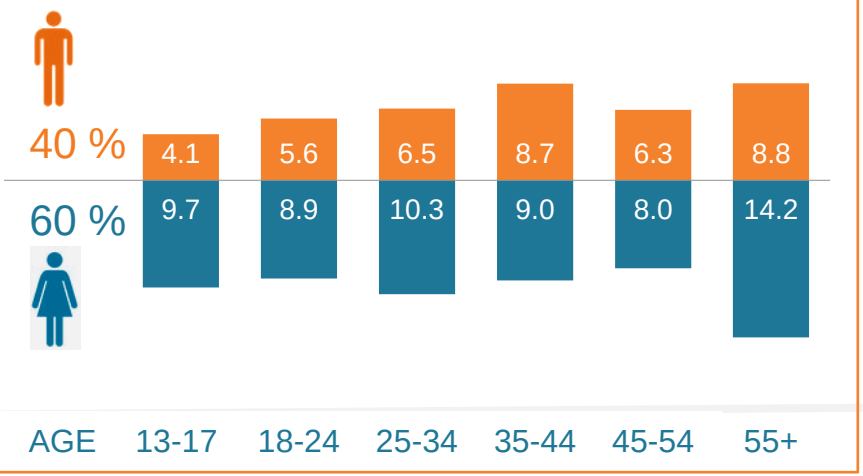
Own Android Device - 16.0 million



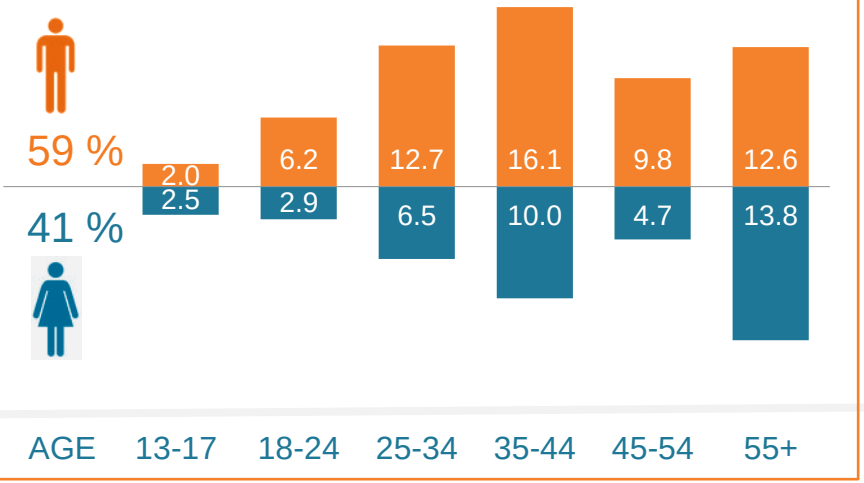
Own iPhone - 2.4 million



Own BlackBerry - 1.6 million



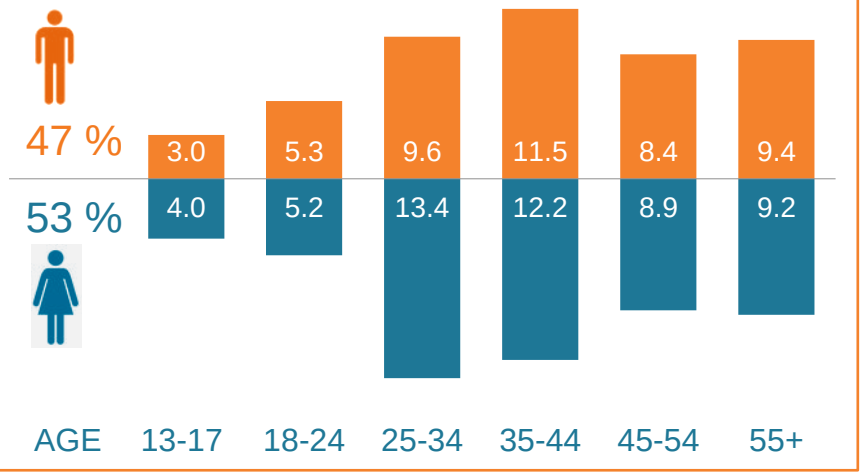
Own Windows Phone - 0.8 million



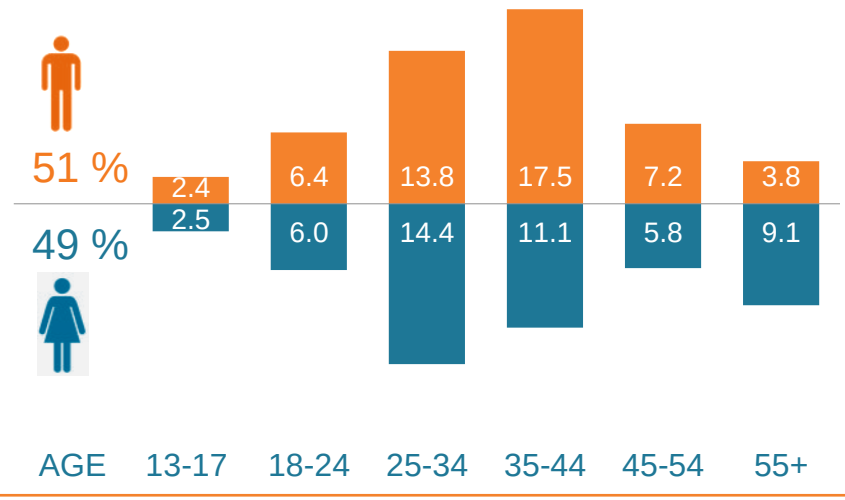
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Spain

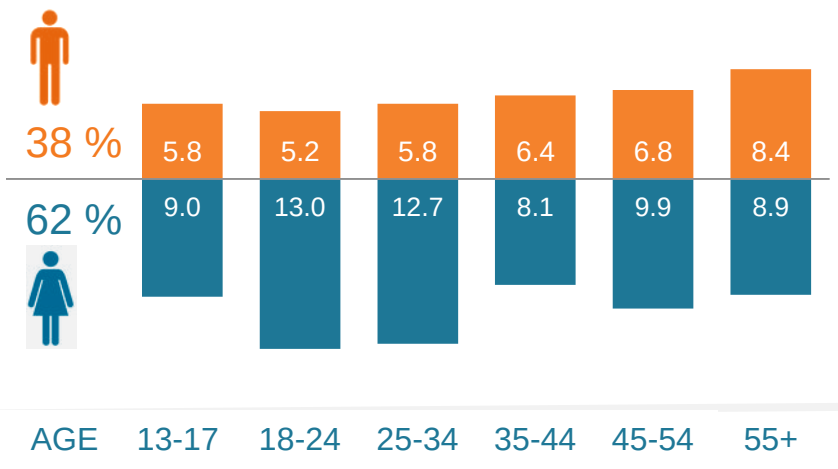
Top Samsung: Galaxy Ace S5830 - 2.1 million



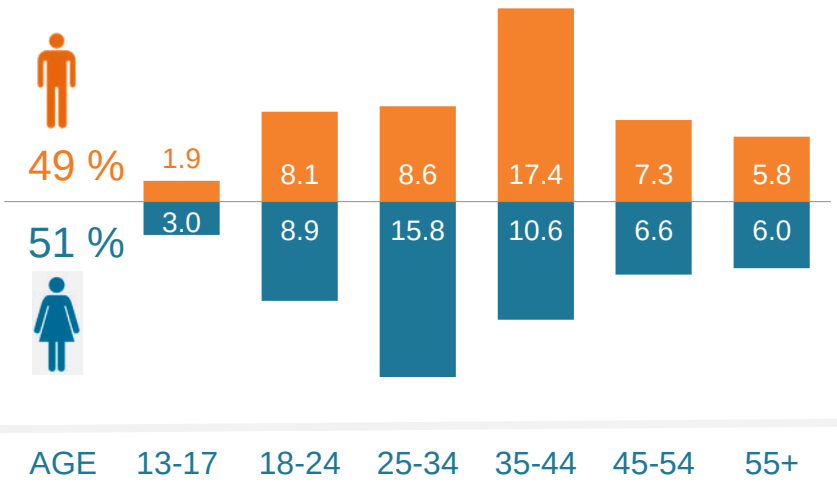
Top Apple: iPhone 4 - 0.9 million



Top Blackberry: Curve 8520 - 0.6 million



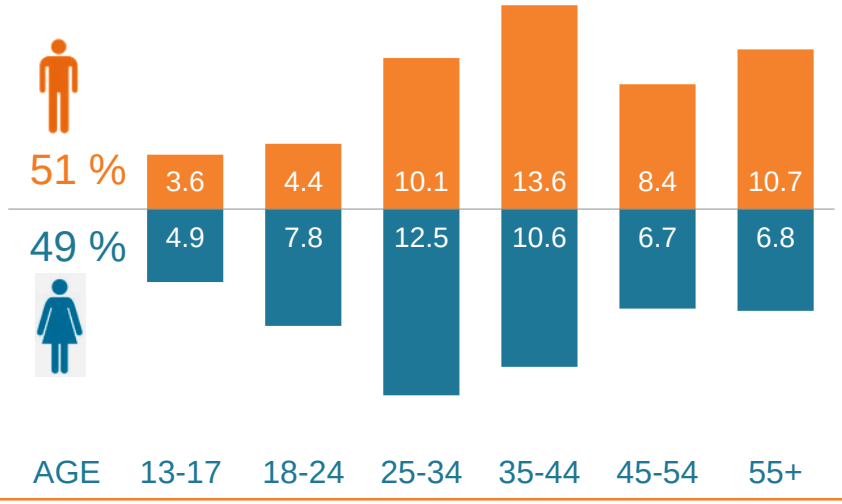
Top Sony: Xperia U - 0.4 million



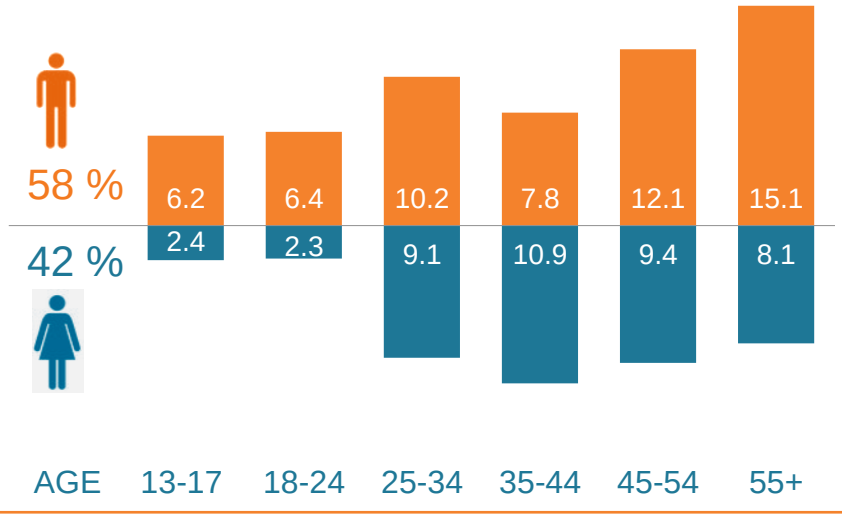
Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Spain

Top HTC: Wildfire S - 0.4 million



Top LG : Optimus L3 E400 - 0.3 million



Source: comScore MobiLens™ - Data based on 3 month moving average to March 2013

Appendix

comScore MobiLens™

comScore MobiLens™ provides market-wide insight into mobile digital media consumption, brand-level audience metrics, and details of device ownership and technology penetration. Using proprietary data collection methods, we survey nationally representative samples of mobile subscribers age 13+ in the U.S., UK, France, Germany, Spain, Italy, Canada, and Japan. The MobiLens sample is substantial enough to provide projected data for sub-segments as small as 1 percent of mobile subscribers. The MobiLens' sampling and survey methods undergo extensive analysis and market validation including comparisons to known network operator market shares, leading handset model shares, downloading activity, and other usage metrics. For more information, please visit:

comScore.com/Products/Audience_Analytics/MobiLens

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2013 Mobile Future in Focus Report

2012 was another milestone year in the life of mobile as continued innovation in hardware, software and device functionality laid the groundwork for the future of the industry. For a look at what's ahead for mobile, download the 2013 Mobile Future in Focus.

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