Mobile Barometer

Q4 2013 EU5

MOBILE MARKETING ASSOCIATION

comScore

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Summary Q4 2013: Total Audience

Millions	UK	Germany	France	Italy	Spain
Installed Base	**49.8**	**61.4**	**47.5**	**48.0**	**36.0**
Access internet	35.2	35.7	27.0	30.2	27.3
Use Social Media	23.7	19.2	14.8	18.2	16.9
Watch Video	13.0	13.1	7.8	12.1	10.9
Use Application	32.5	32.3	22.4	26.3	24.7
Scan QR Code	3.4	6.5	3.7	3.7	3.9
Play Game	19.5	19.7	8.8	17.7	13.4
Send Text	45.6	48.1	42.5	40.2	25.1
Own Android Phone	18.3	23.4	16.0	15.4	19.9
Own iPhone	10.3	7.1	6.0	4.8	2.6
Own BlackBerry Phone	3.3	0.5	1.6	1.0	1.1
Own Windows Phone	2.2	2.0	1.7	2.7	1.0
Own Tablet	14.4	9.2	8.3	8.0	7.5

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

Summary Q4 2013: Penetration

	UK	Germany	France	Italy	Spain
Installed Base	**49.8**	**61.4**	**47.5**	**48.0**	**36.0**
Access internet	71%	59%	57%	63%	76%
Use Social Media	48%	31%	31%	38%	47%
Watch Video	26%	21%	16%	25%	30%
Use Application	66%	53%	47%	55%	69%
Scan QR Code	7%	11%	8%	8%	11%
Play Game	39%	32%	19%	37%	37%
Send Text	92%	79%	89%	84%	70%
Own Android Phone	37%	38%	34%	32%	55%
Own iPhone	21%	12%	13%	10%	7%
Own BlackBerry Phone	7%	1%	3%	2%	3%
Own Windows Phone	4%	3%	4%	6%	3%
Own Tablet	29%	15%	17%	17%	21%

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

Summary Q4 2013: Change From Q3

	UK	Germany	France	Italy	Spain
Installed Base	**49.8**	**61.4**	**47.5**	**48.0**	**36.0**
Access internet	1%	2%	1%	5%	3%
Use Social Media	3%	5%	1%	9%	0%
Watch Video	0%	4%	-5%	5%	-3%
Use Application	2%	2%	1%	6%	3%
Scan QR Code	-1%	-1%	-5%	6%	1%
Play Game	2%	2%	-2%	-1%	-1%
Send Text	1%	0%	1%	-1%	-3%
Own Android Phone	3%	4%	9%	12%	9%
Own iPhone	4%	2%	-3%	6%	-1%
Own BlackBerry Phone	-7%	-14%	-16%	-7%	-20%
Own Windows Phone	7%	-1%	12%	11%	12%
Own Tablet	10%	6%	7%	10%	17%

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

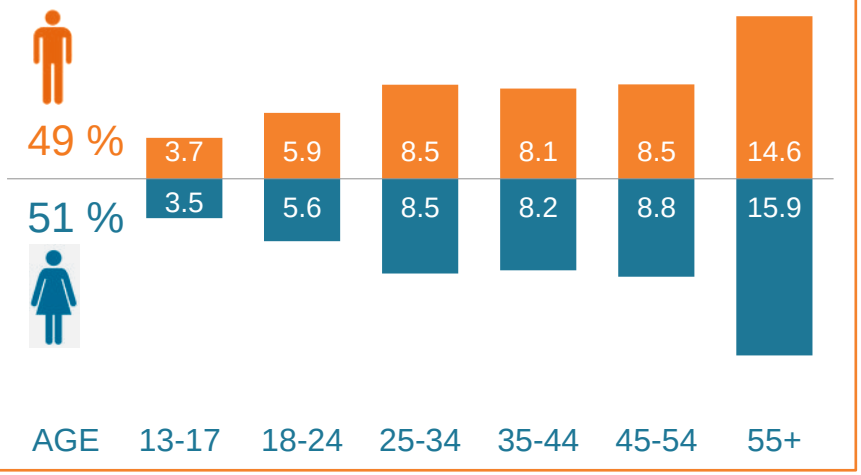


United Kingdom

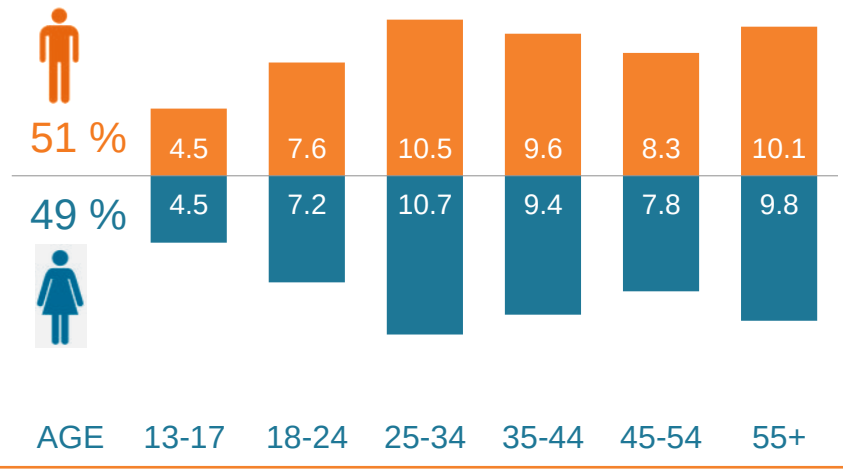


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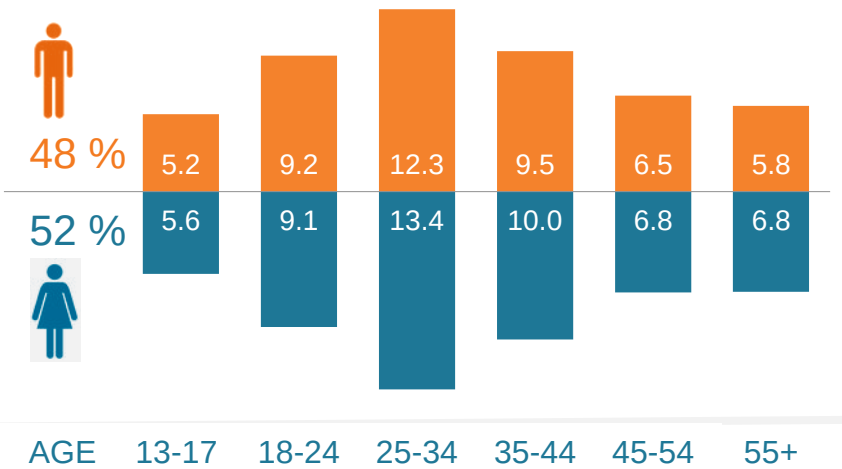
Total Mobile Audience - 49.8 million



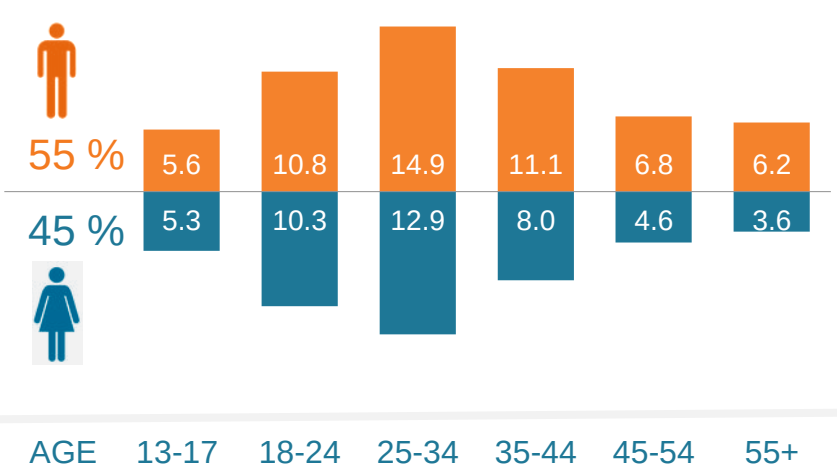
Connect to Internet - 35.7 million



Use Social Media - 23.9 million



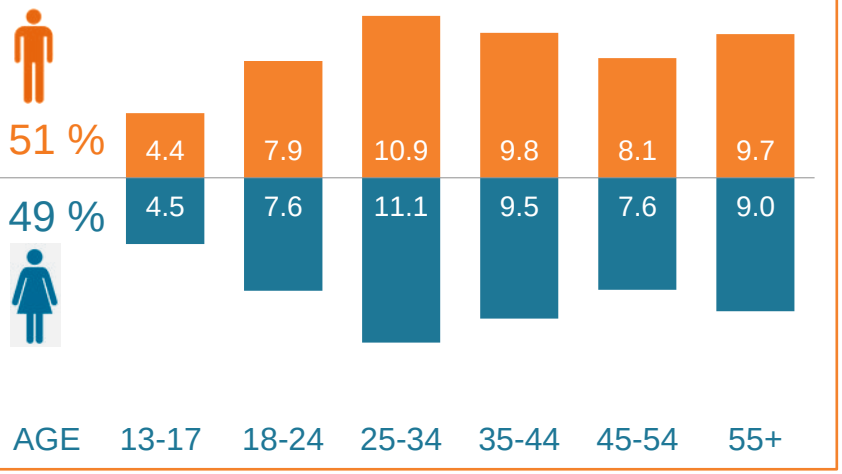
Watch Video - 13.2 million



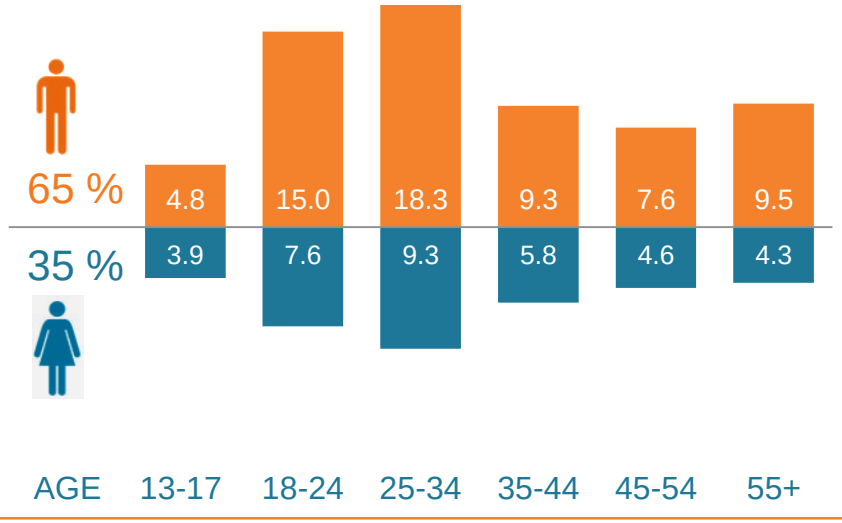
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

United Kingdom

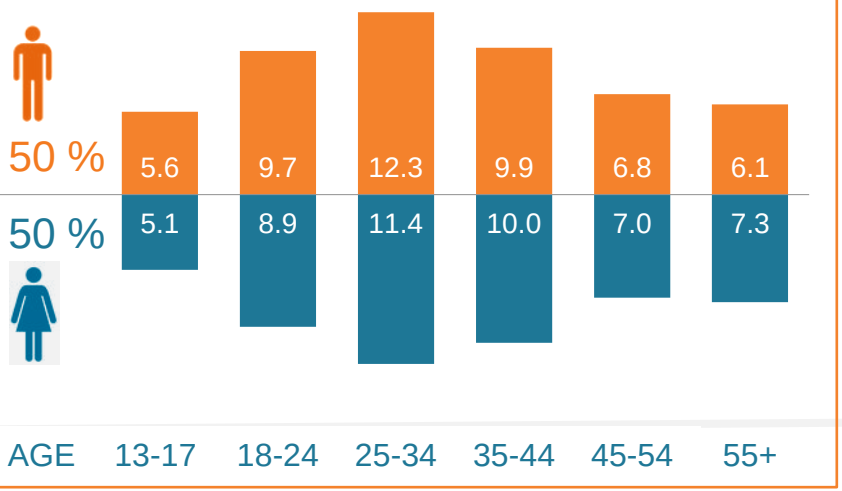
Use Application - 32.7 million



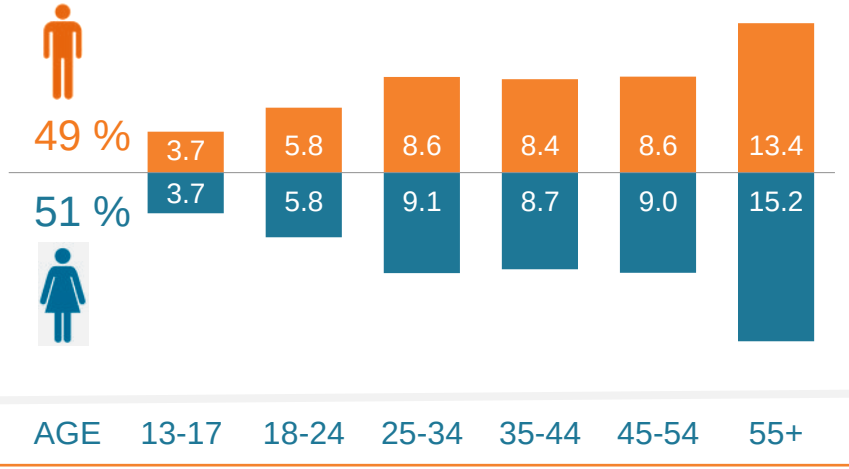
Scan QR Code - 3.3 million



Play Game - 19.5 million



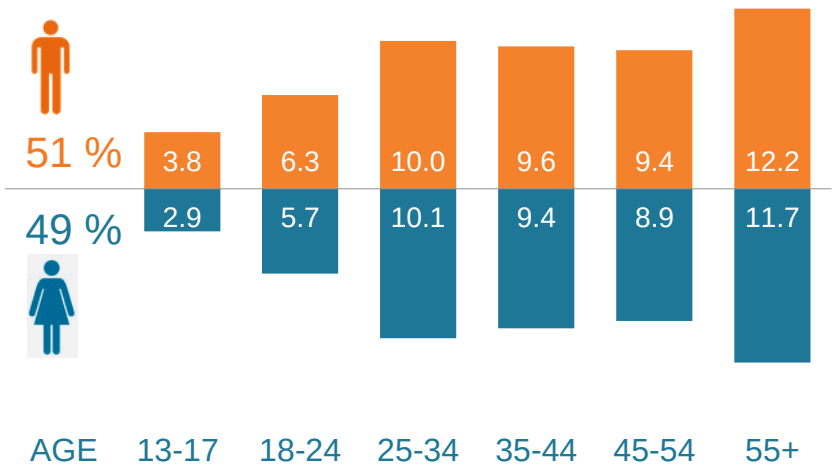
Send Text - 45.7 million



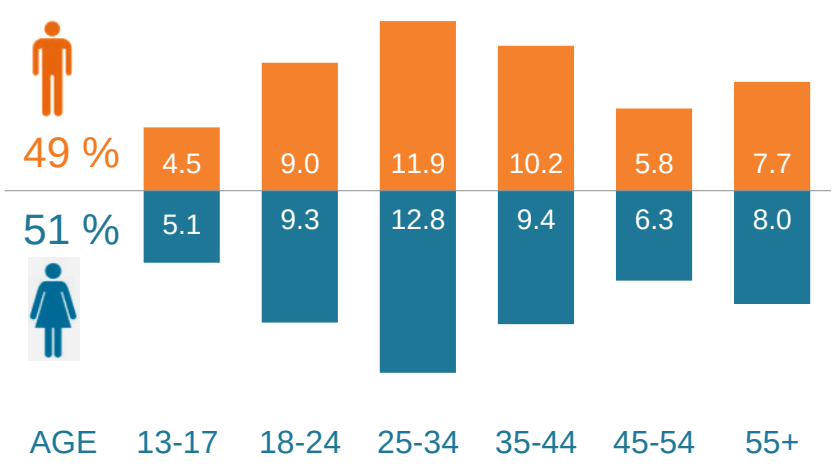
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

United Kingdom

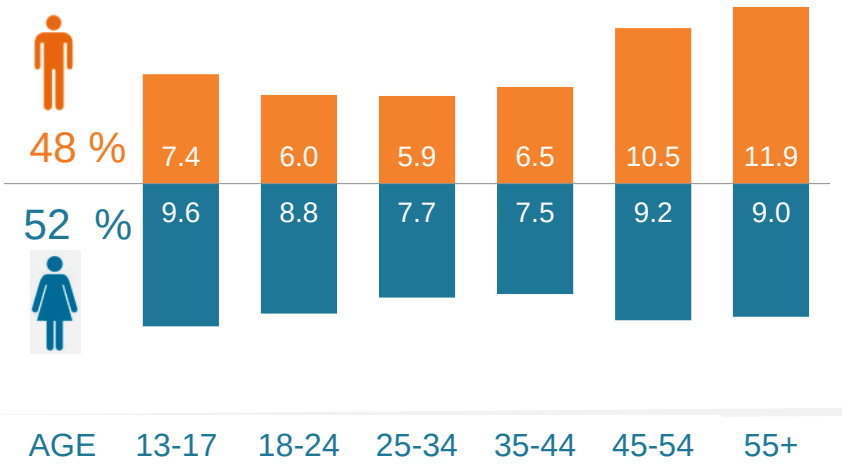
Own Android Device - 19.0 million



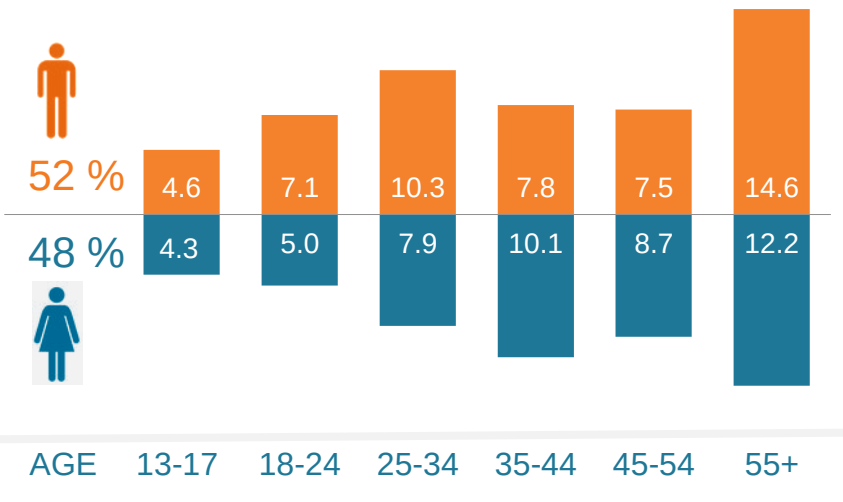
Own iPhone - 10.9 million



Own BlackBerry - 2.7 million



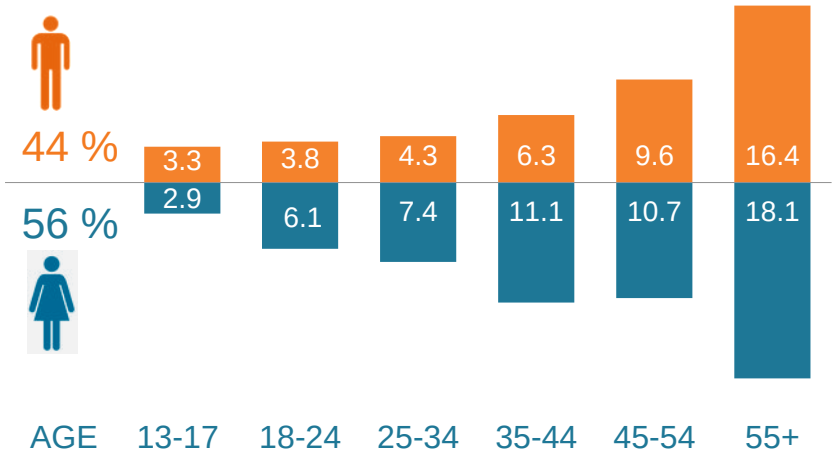
Own Windows Phone - 2.4 million



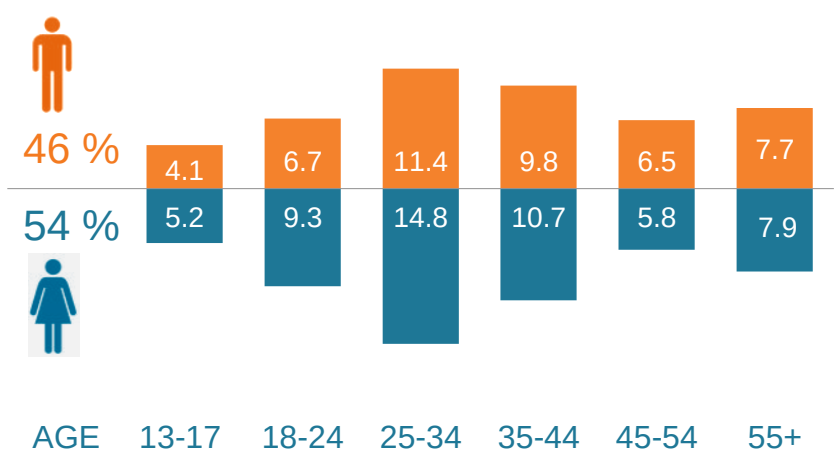
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

United Kingdom

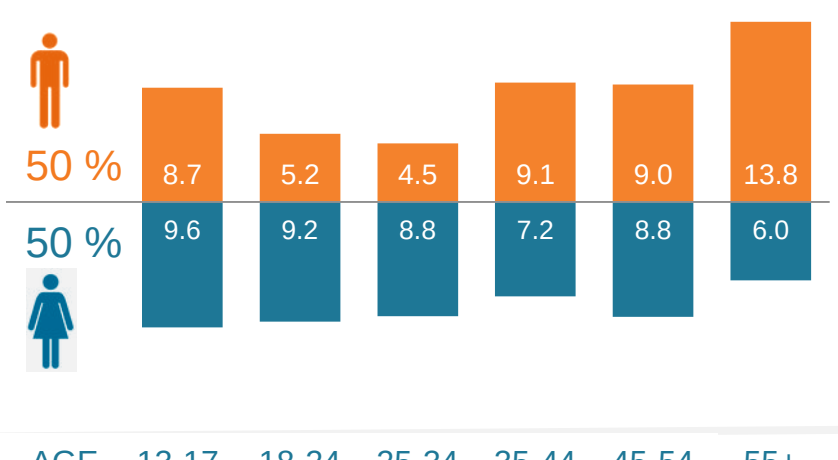
Top Samsung: Galaxy Ace - 2.0 million



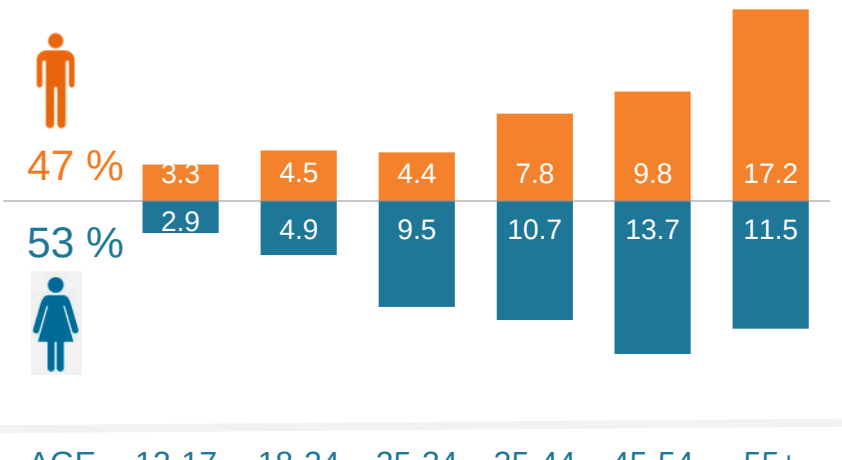
Top Apple: iPhone 4S - 3.6 million



Top Blackberry: Curve 9320 - 0.5 million



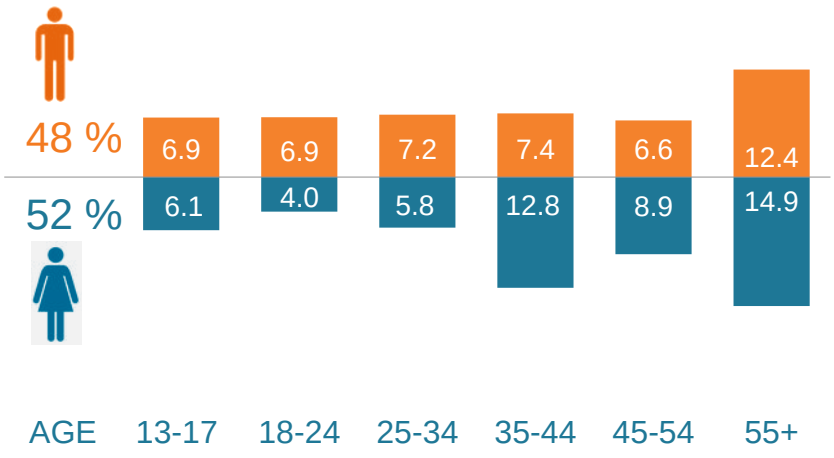
Top HTC: Desire C - 0.5 million



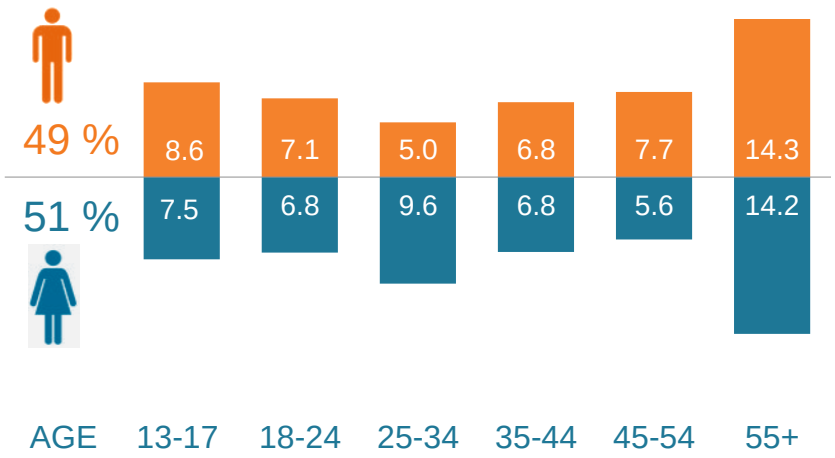
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

United Kingdom

Top Nokia: Lumia 520 - 0.5 million



Top Sony: Xperia U - 0.2 million



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



Germany



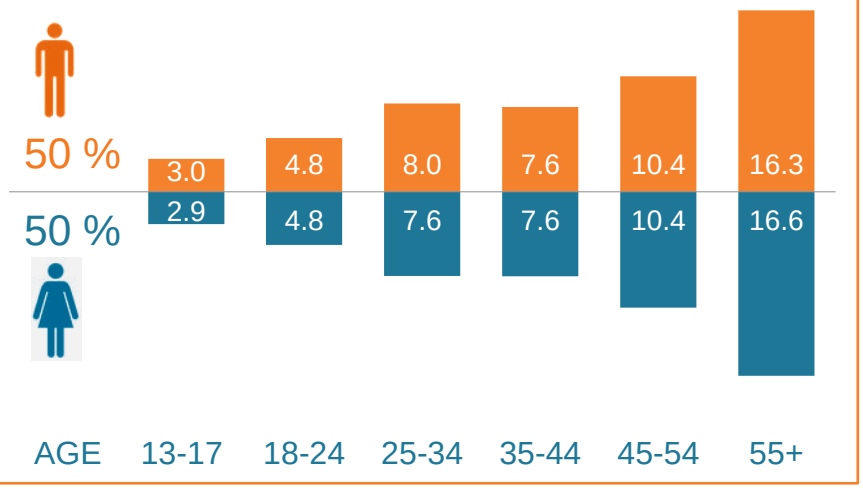
Germany



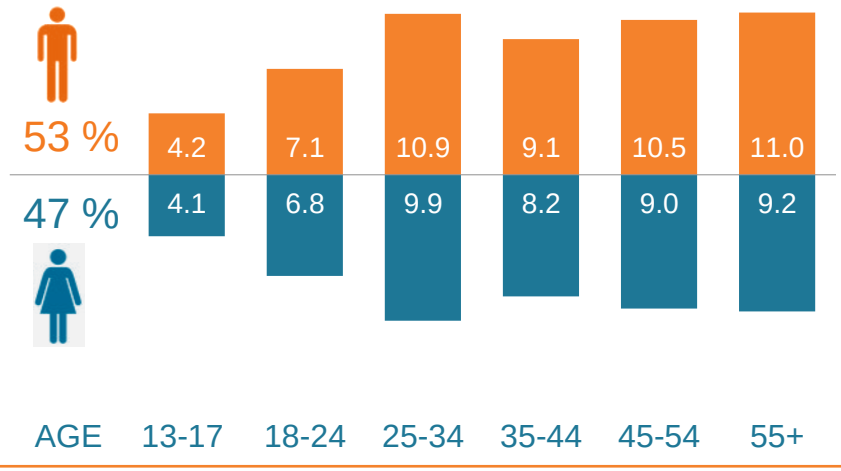
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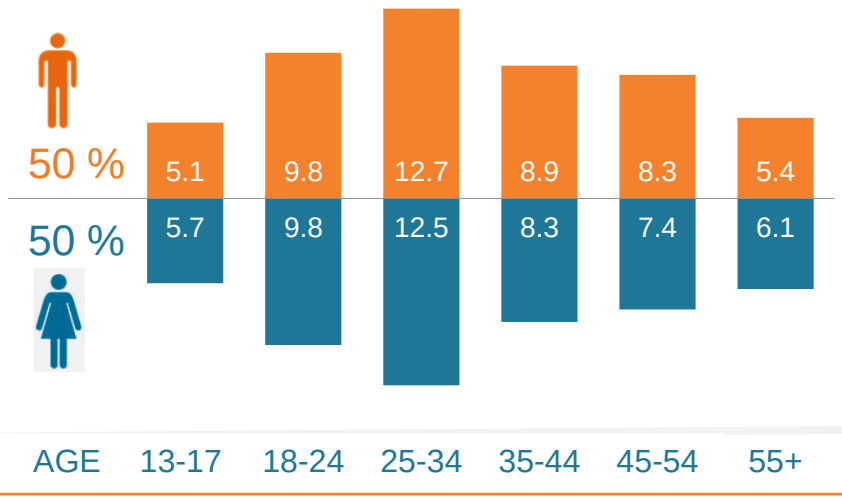
Total Mobile Audience - 61.4 million



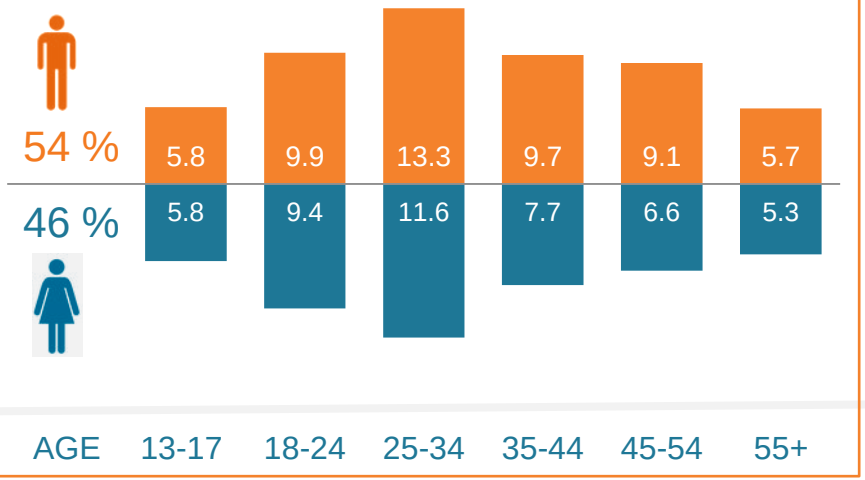
Connect to Internet - 37.0 million



Use Social Networking - 20.4 million



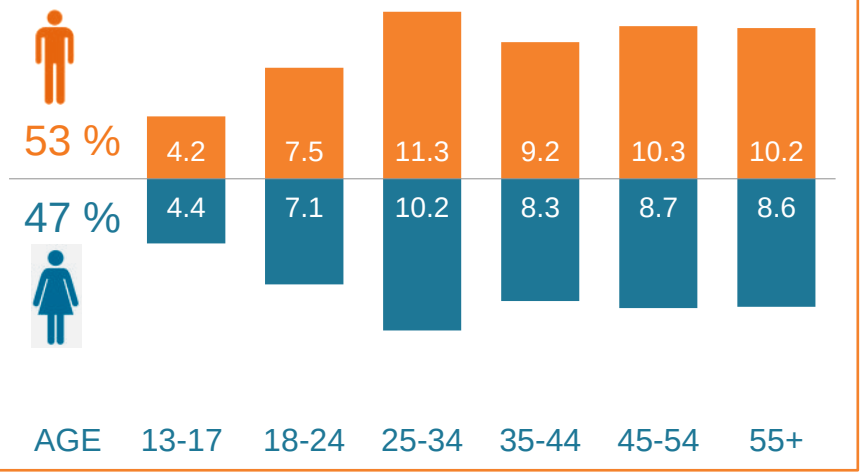
Watch Video - 14.9 million



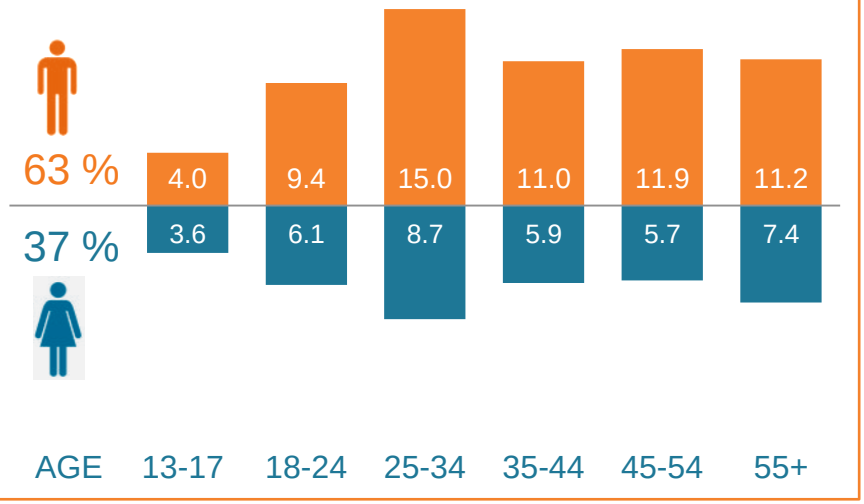
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

Germany

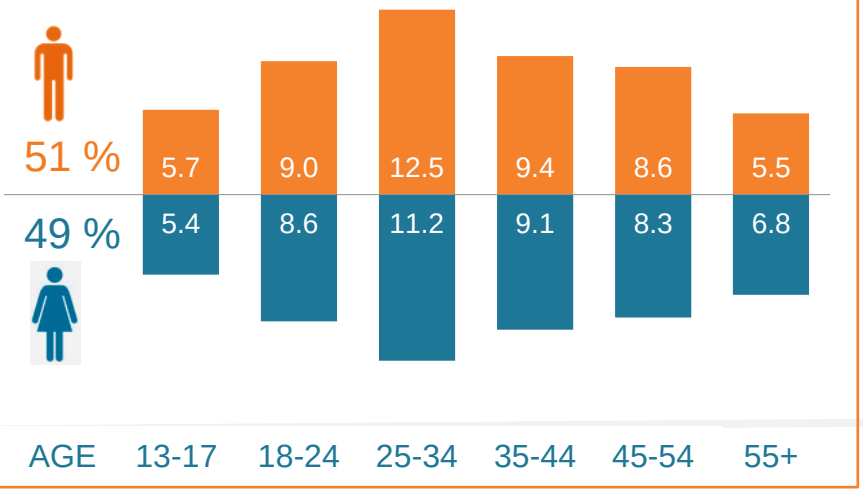
Use Application - 33.8 million



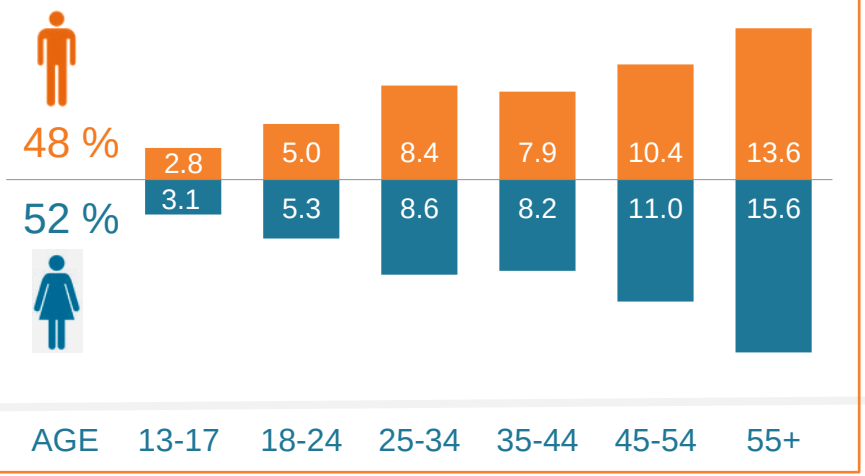
Scan QR Code - 7.0 million



Play Game - 22.2 million



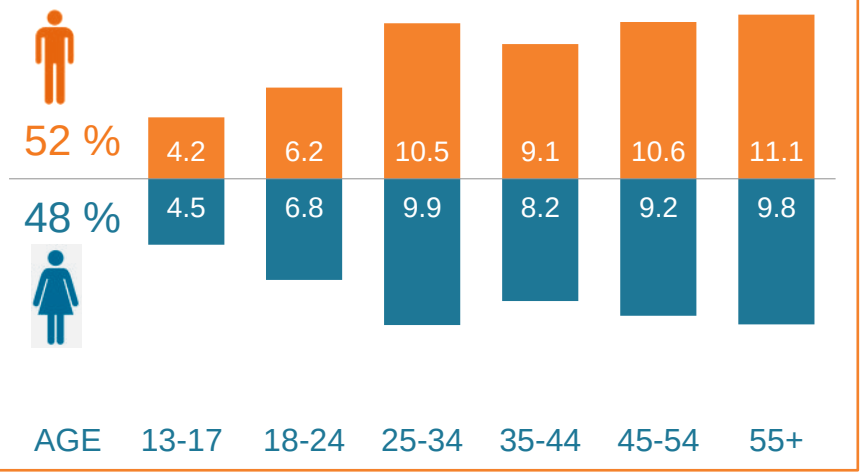
Send Text - 49.2 million



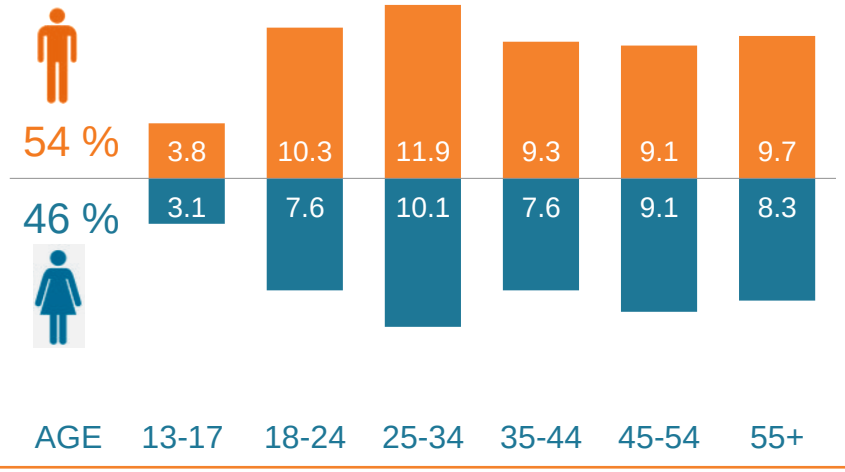
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

Germany

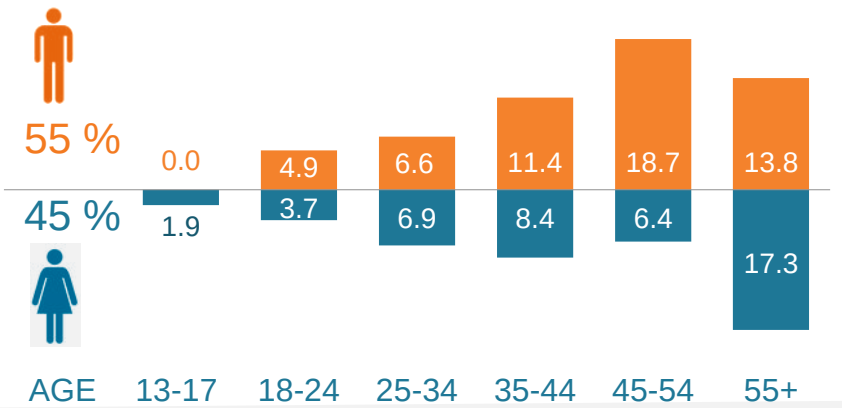
Own Android Phone - 25.3 million



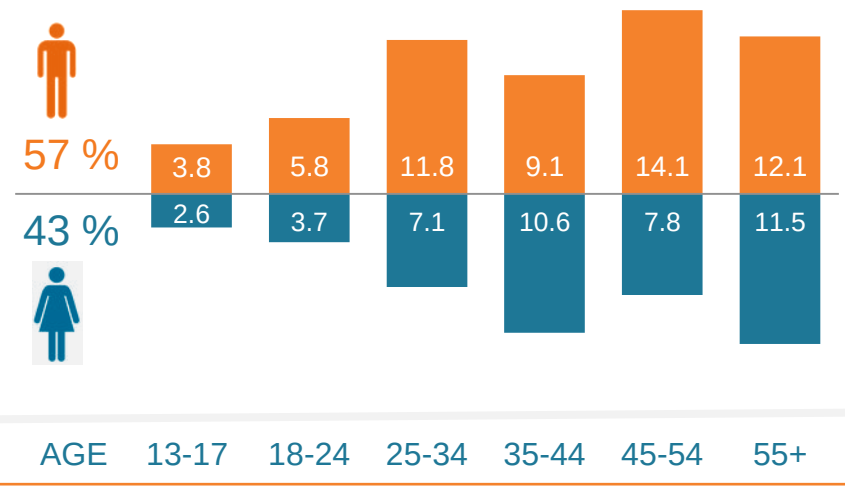
Own iPhone - 7.5 million



Own BlackBerry Phone - 0.5 million



Own Windows Phone - 2.0 million



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

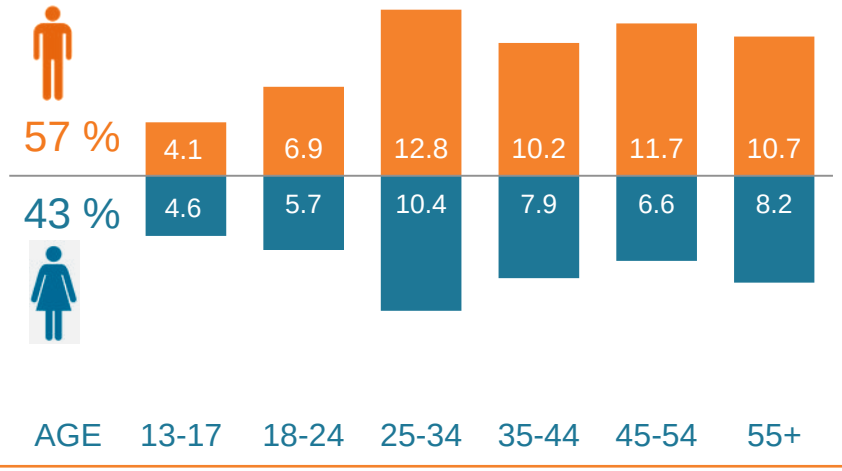
Germany



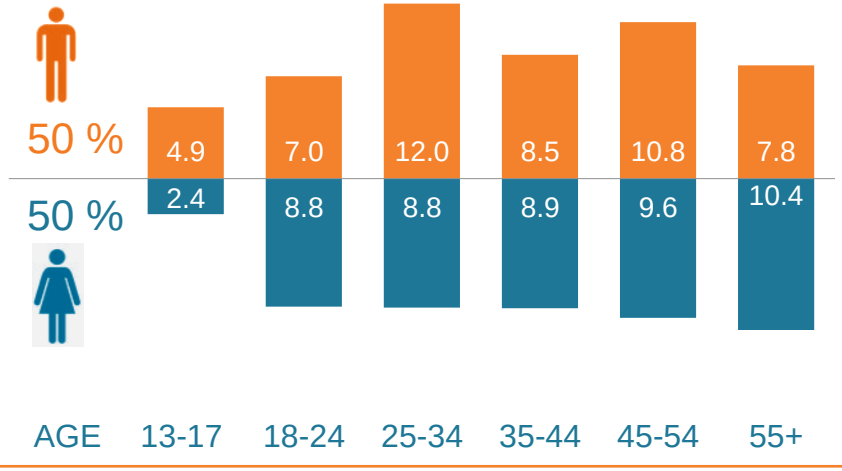
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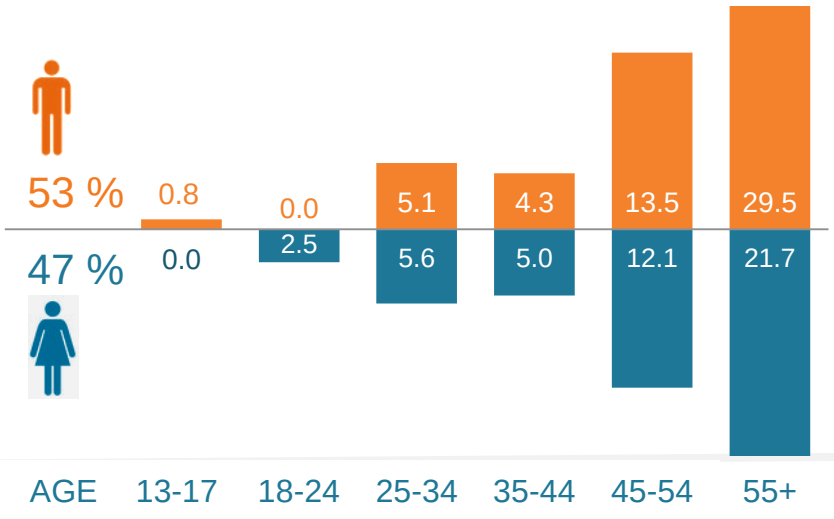
Top Samsung: Galaxy S3 - 2.7 million



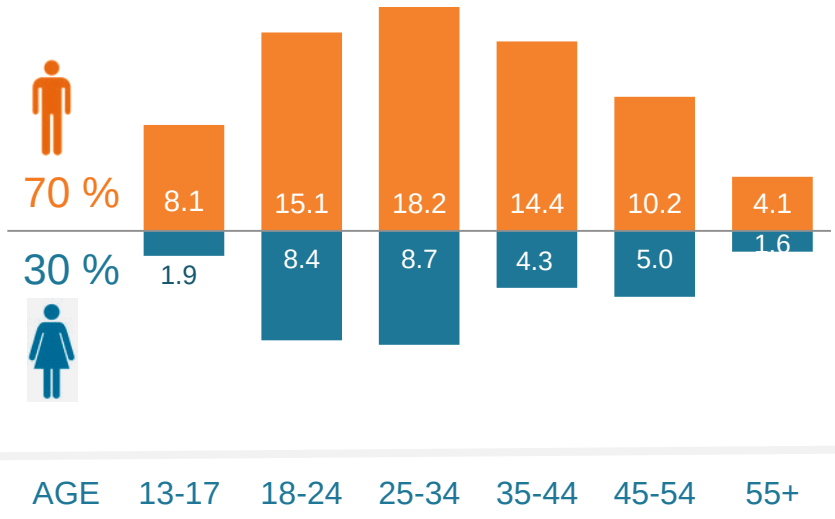
Top Apple: iPhone 4S - 2.4 million



Top Nokia: Lumia 6300 - 0.2 million



Top HTC: One S - 0.4 million



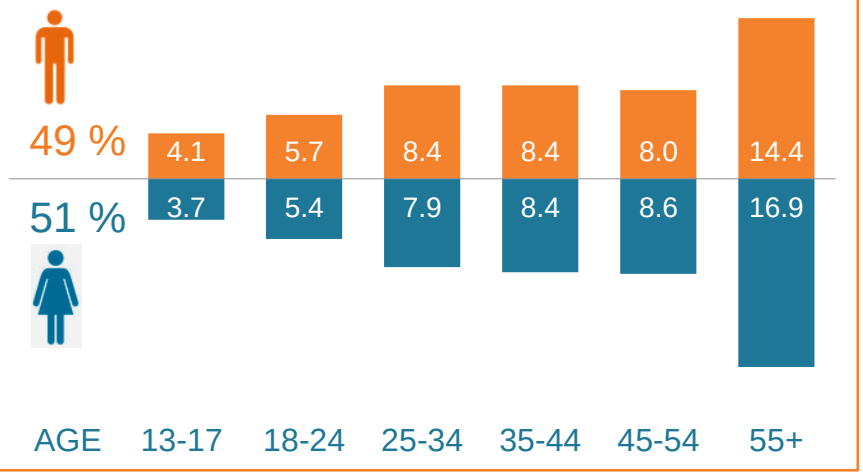
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

France

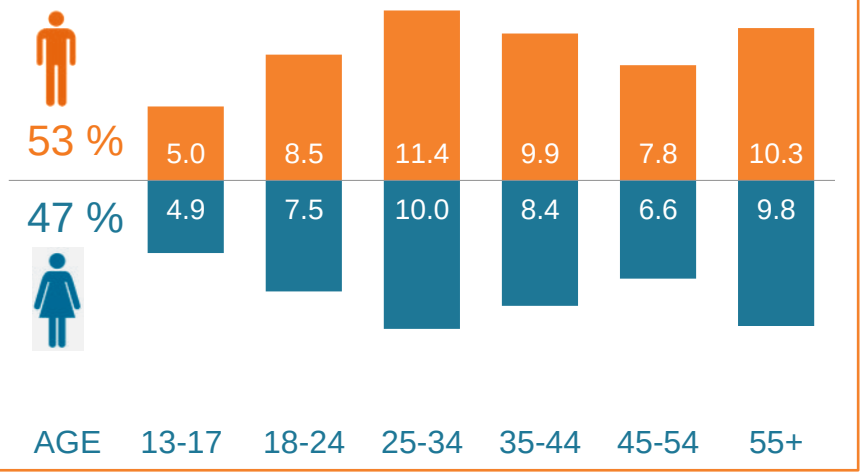


France

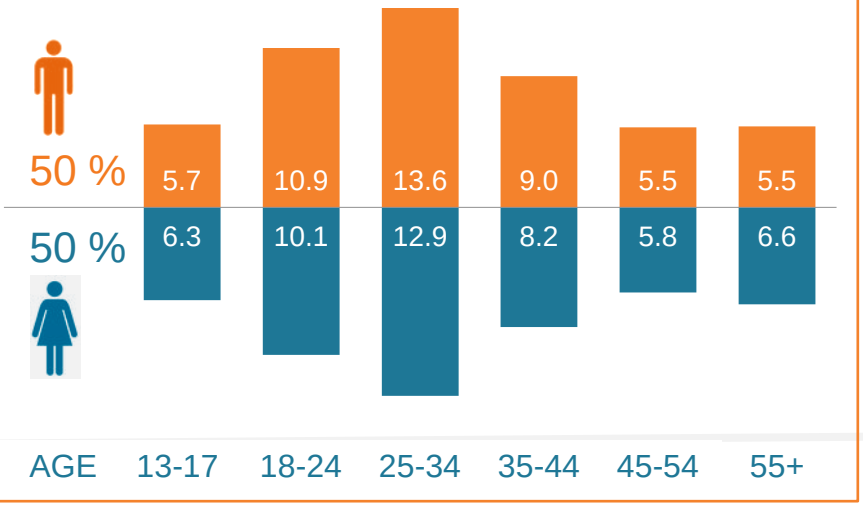
Total Mobile Audience - 47.5 million



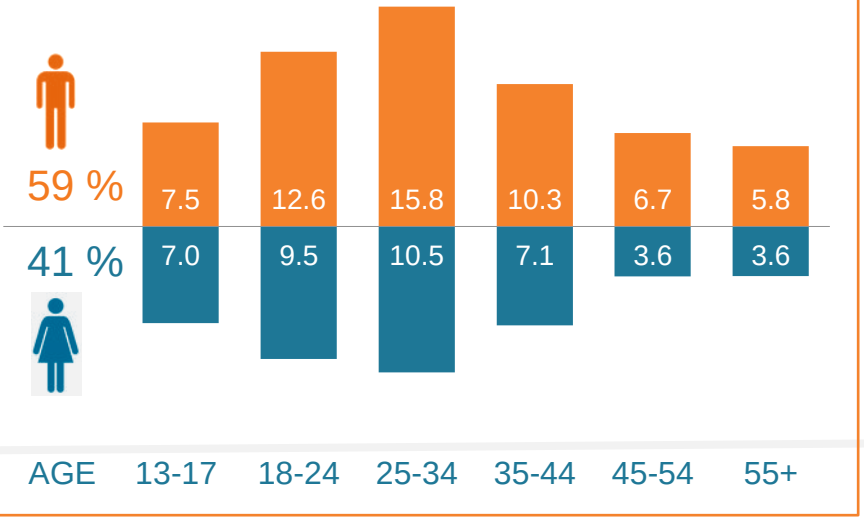
Connect to Internet - 28.0 million



Use Social Media - 16.1 million



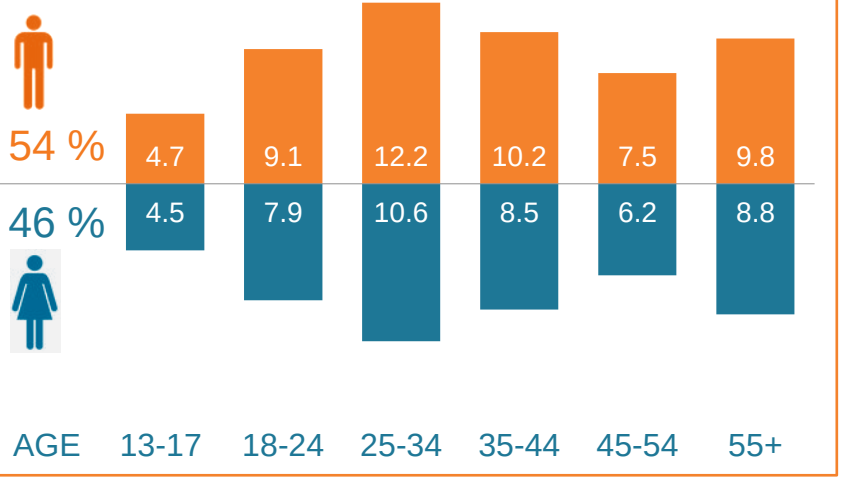
Watch Video - 8.7 million



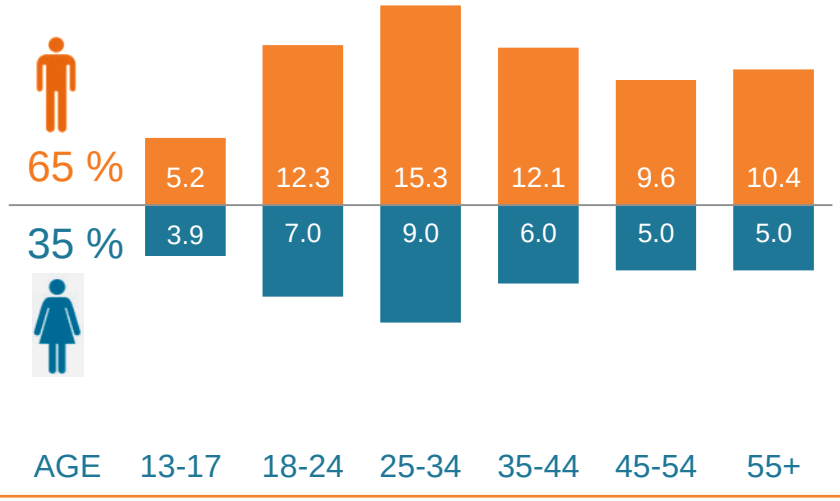
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

France

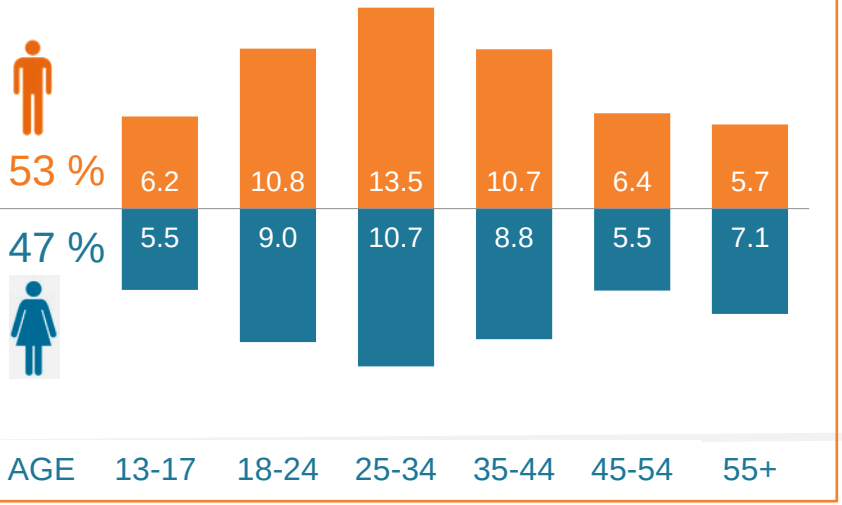
Use Application - 24.1 million



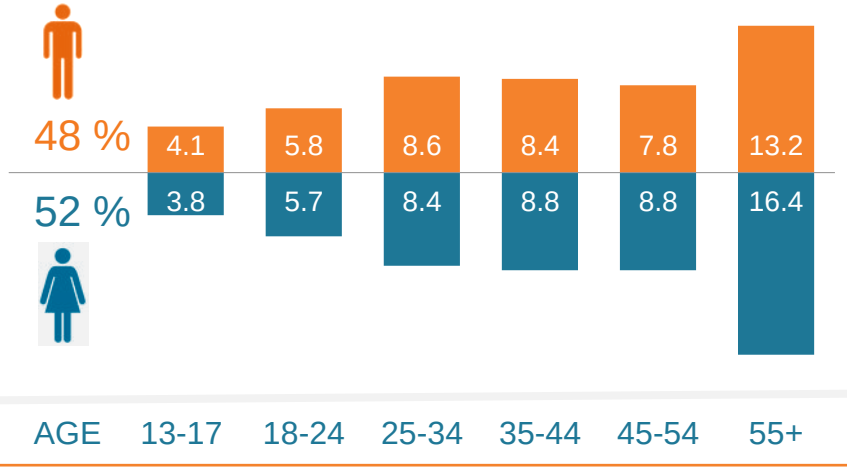
Scan QR Code - 4.0 million



Play Game - 16.1 million



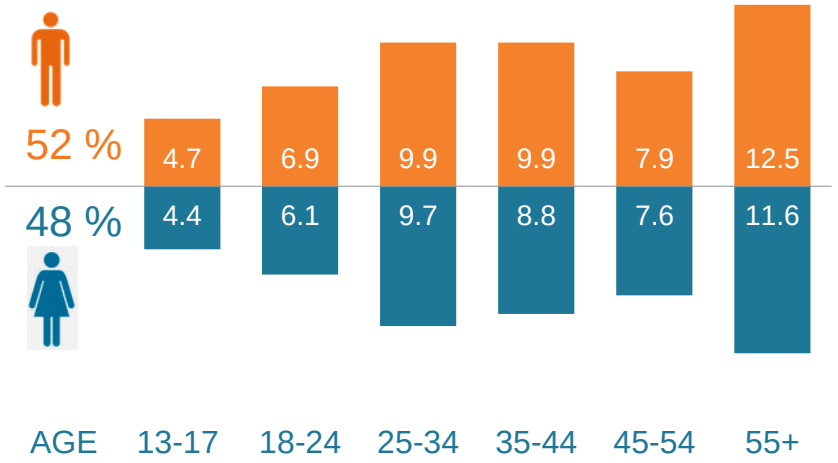
Send Text - 42.7 million



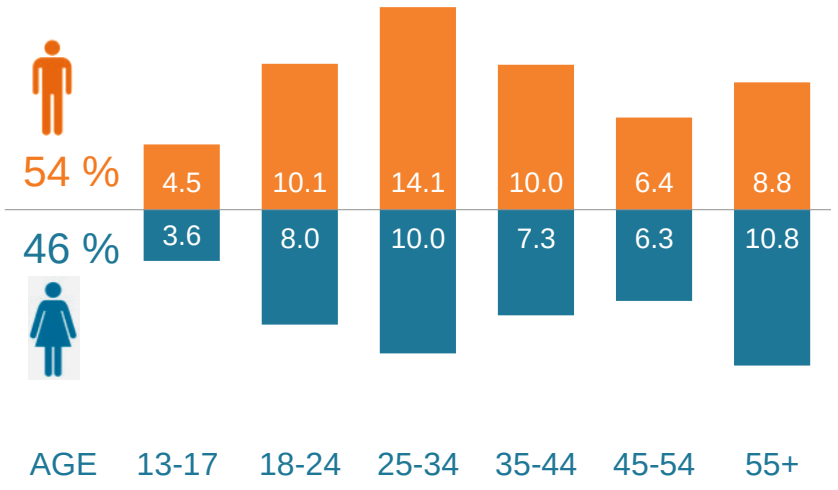
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

France

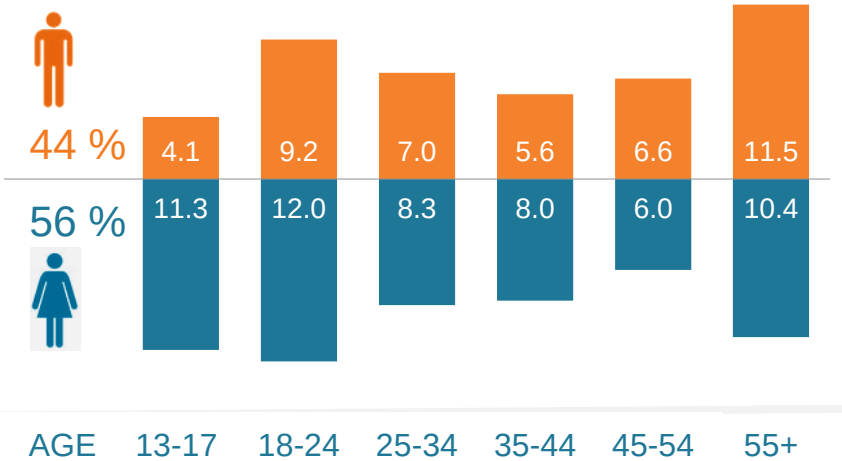
Own Android Device - 16.8 million



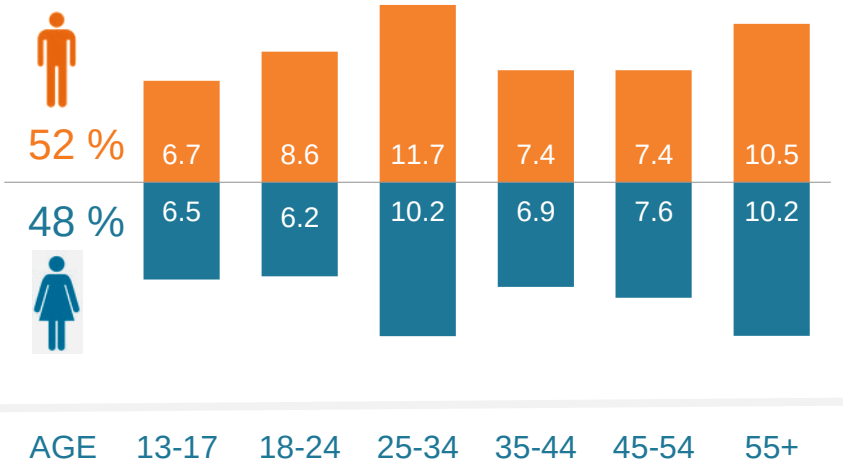
Own iPhone - 6.5 million



Own BlackBerry - 1.5 million



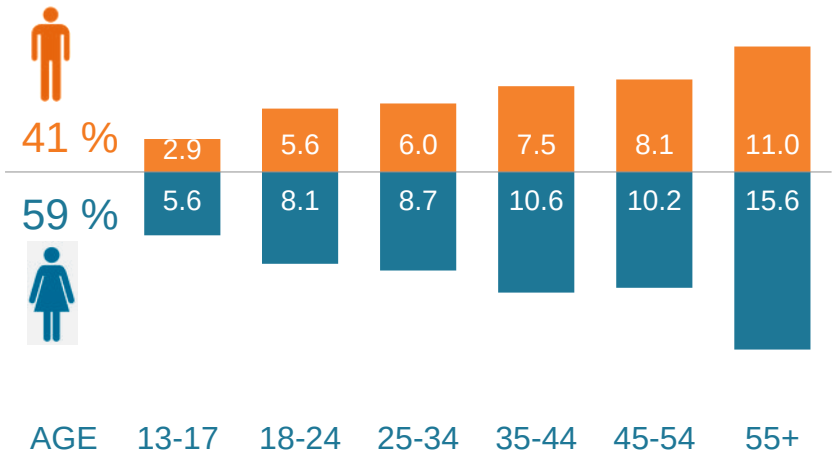
Own Windows Phone - 2.1 million



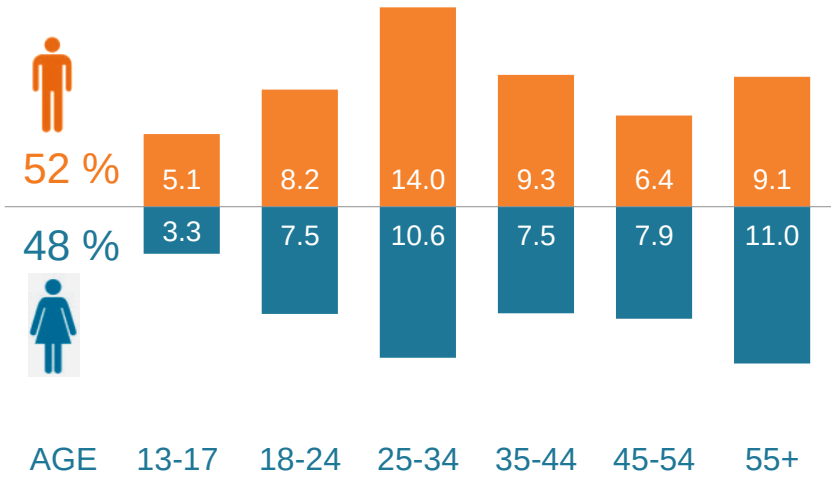
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

France

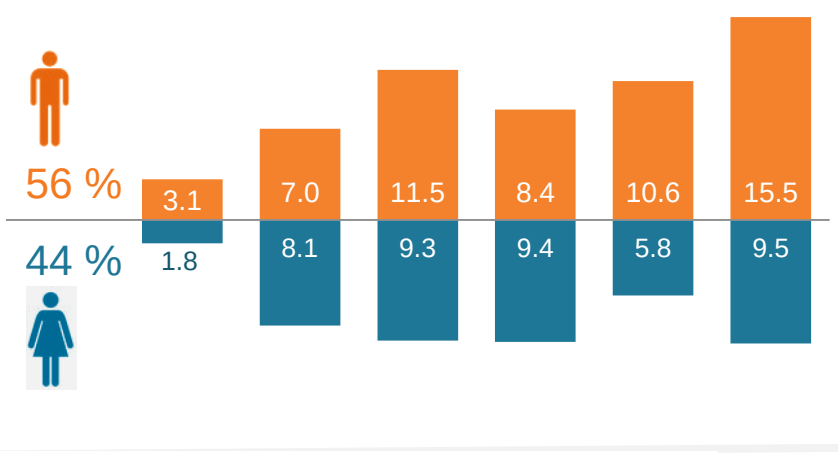
Top Samsung: Galaxy Ace S5830 - 2.1 million



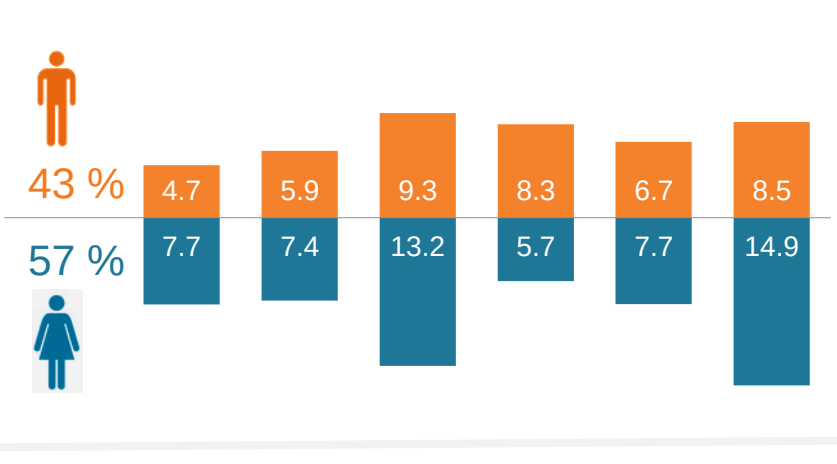
Top Apple: iPhone 4S - 2.0 million



Top LG: Optimus L7 P700 - 0.4 million



Top Nokia: Lumia 520 - 0.5 million



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

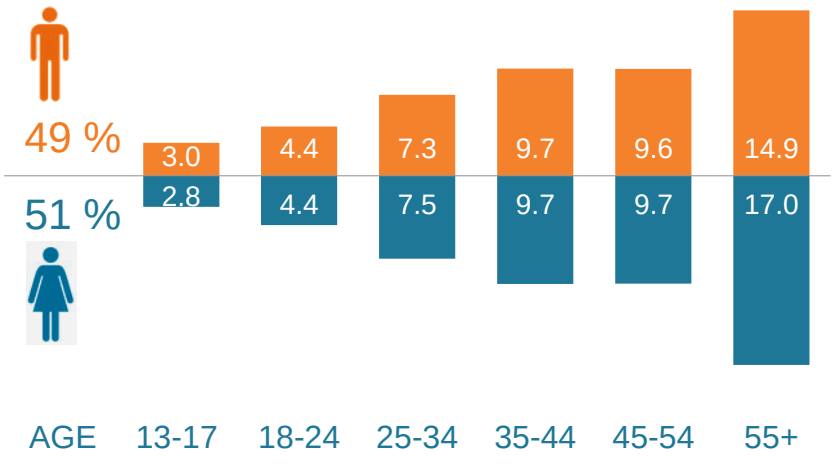


Italy

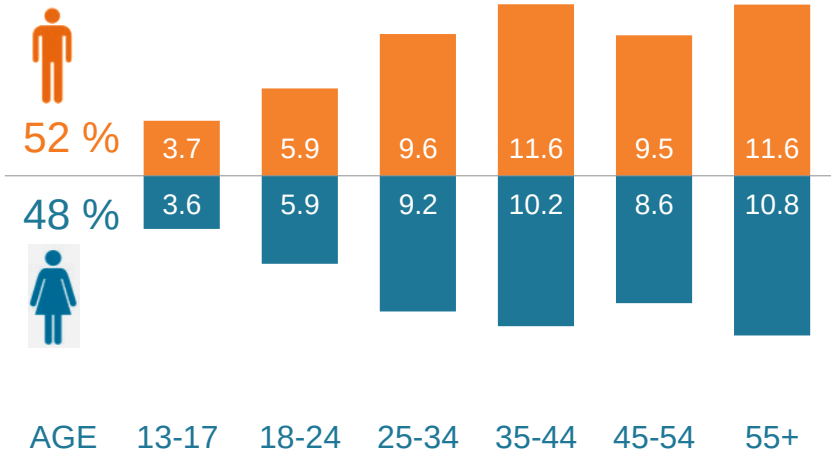


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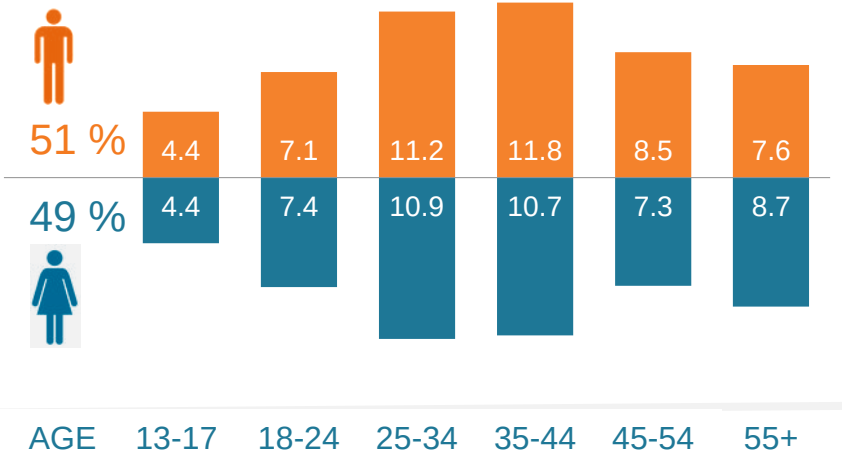
Total Mobile Audience - 48.0 million



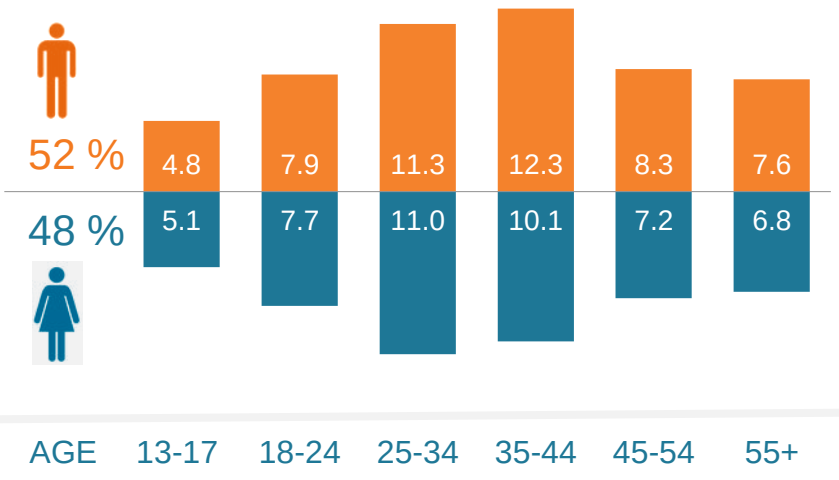
Connect to Internet - 32.4 million



Use Social Media - 20.1 million



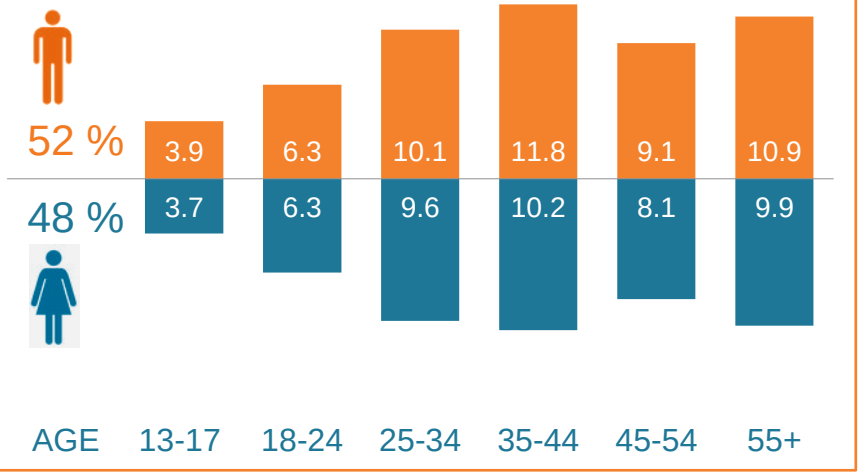
Watch Video - 14.3 million



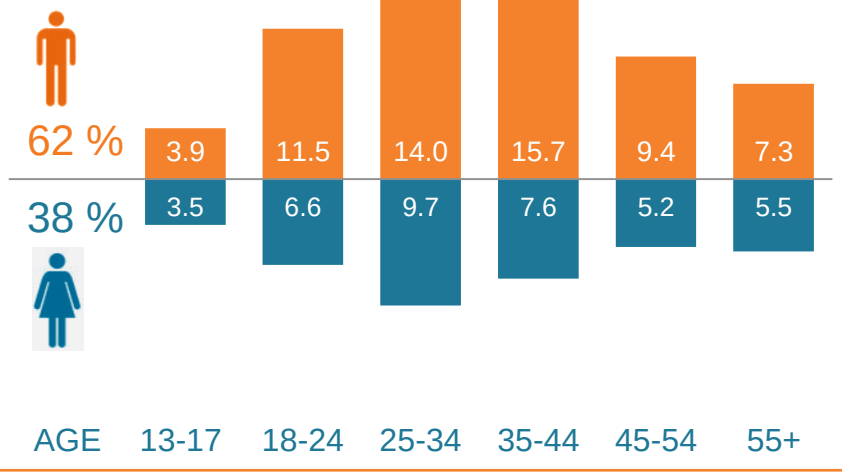
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

Italy

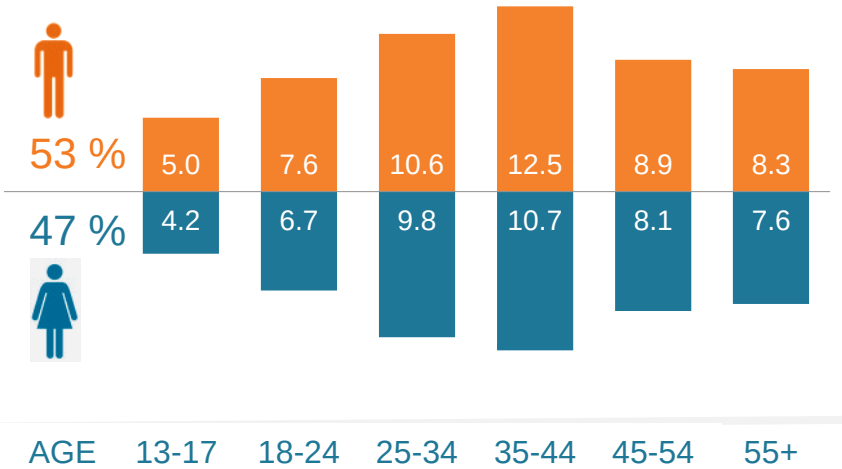
Use Application - 29.0 million



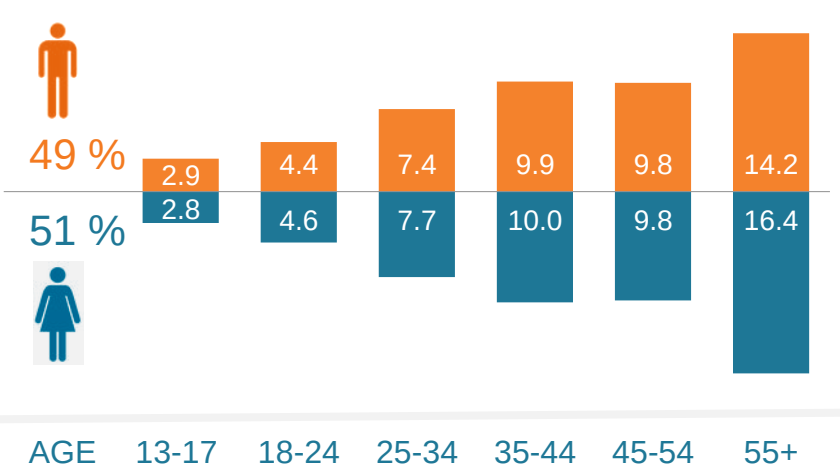
Scan QR Code - 4.1 million



Play Game - 20.0 million



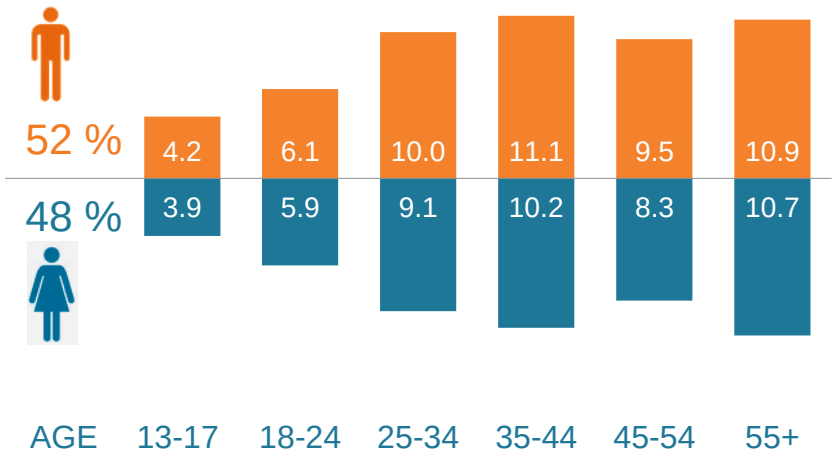
Send Text - 40.3 million



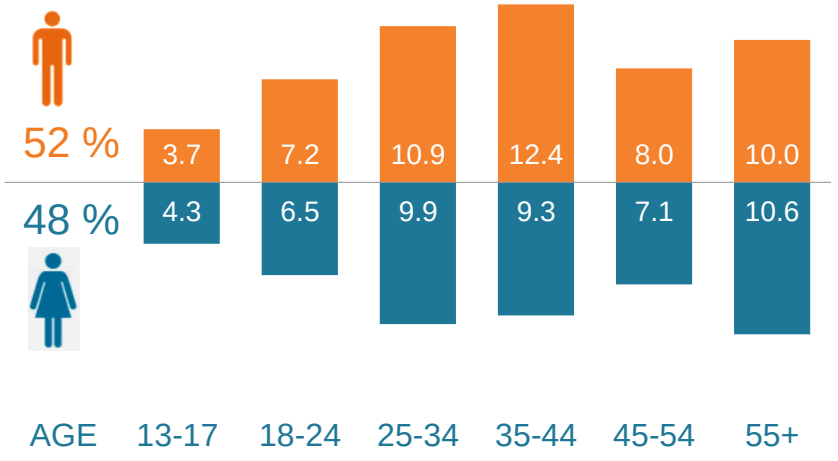
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

Italy

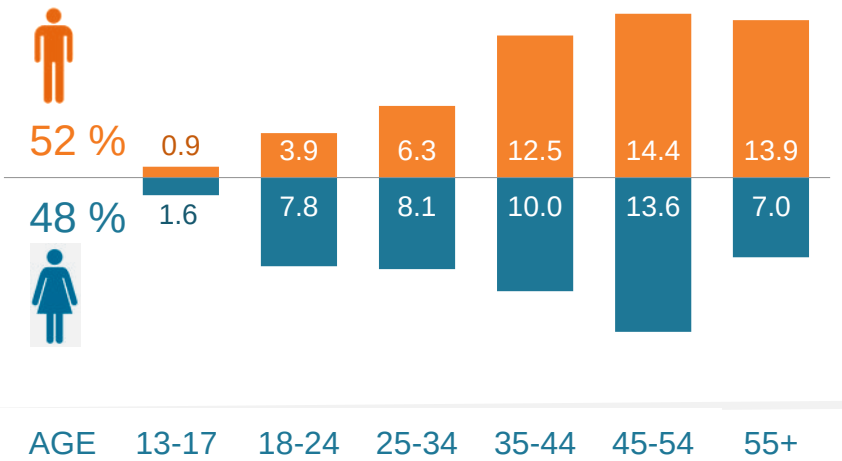
Own Android Device - 17.9 million



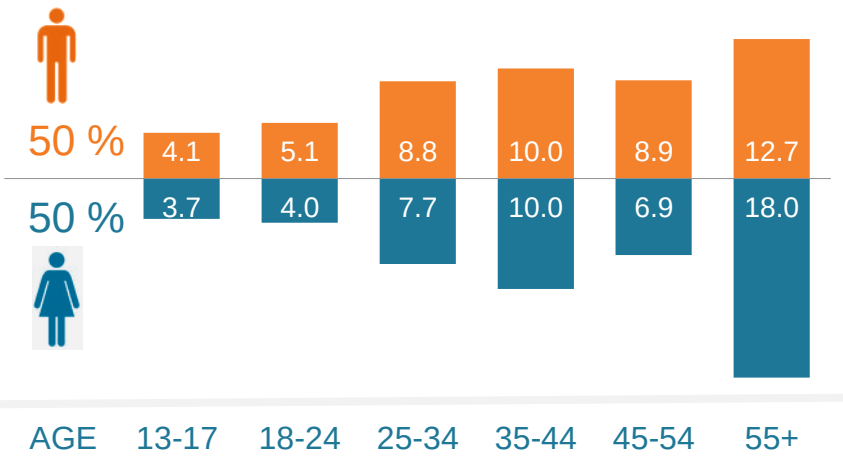
Own iPhone - 5.3 million



Own BlackBerry - 0.9 million



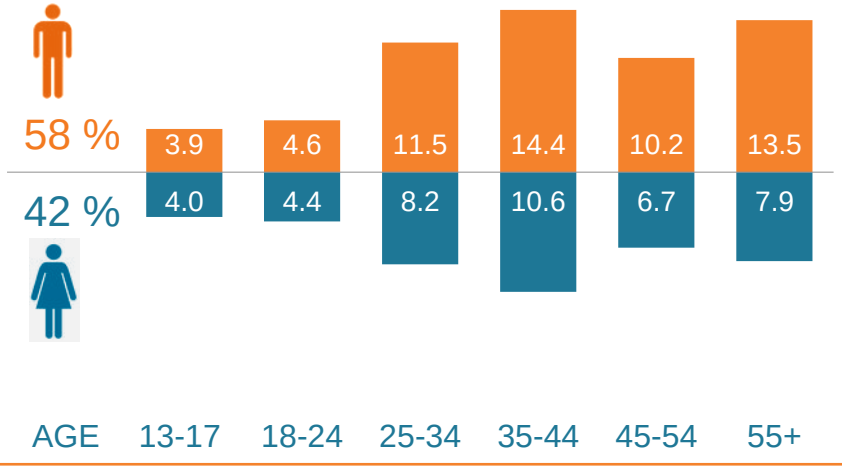
Own Windows Phone - 3.1 million



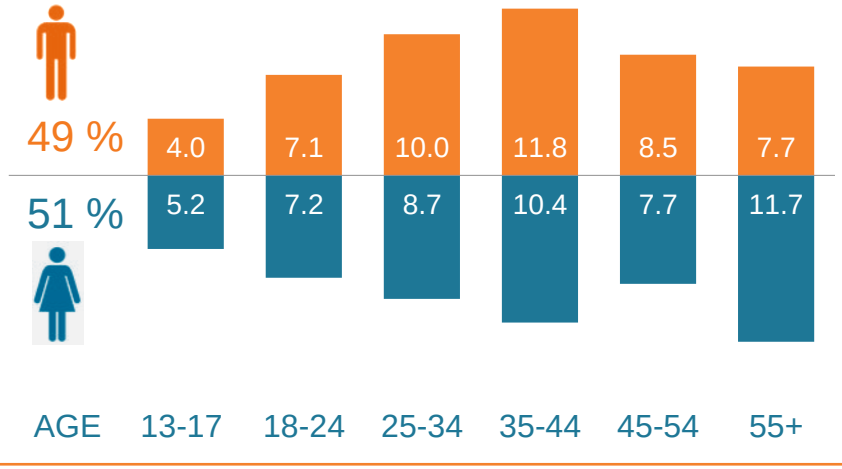
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

Italy

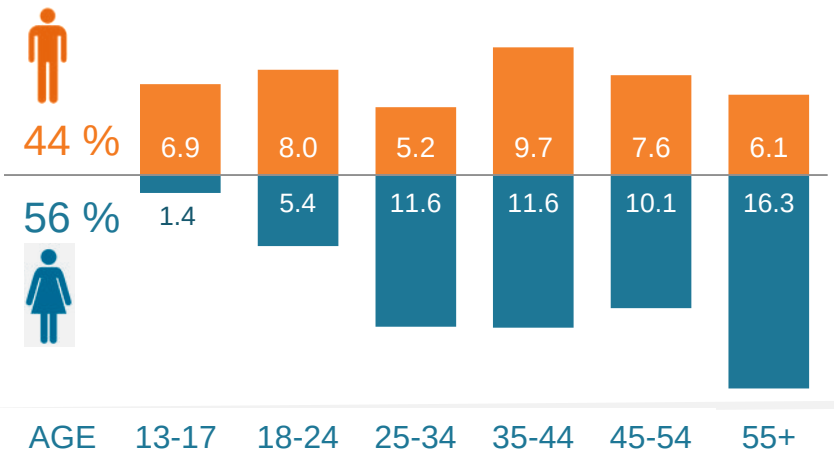
Top Samsung: Galaxy S3 - 1.8 million



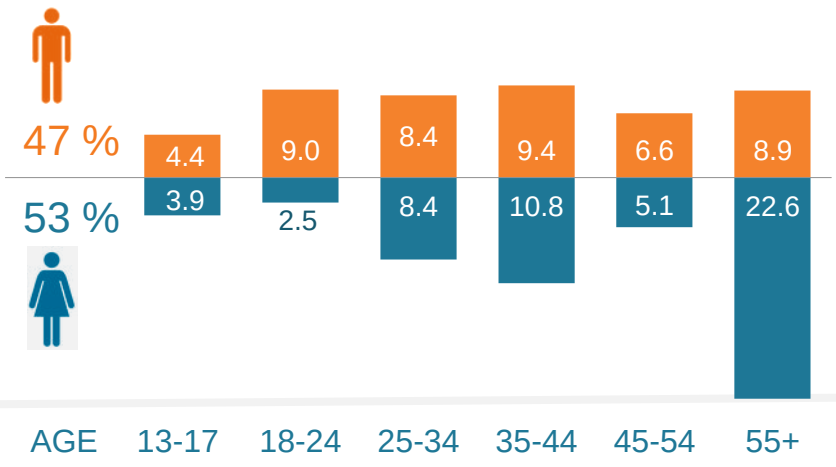
Top Apple: iPhone 4S - 1.5 million



Top LG: Optimus L5 E610 - 0.4 million



Nokia - Lumia 610 - 0.4 million



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

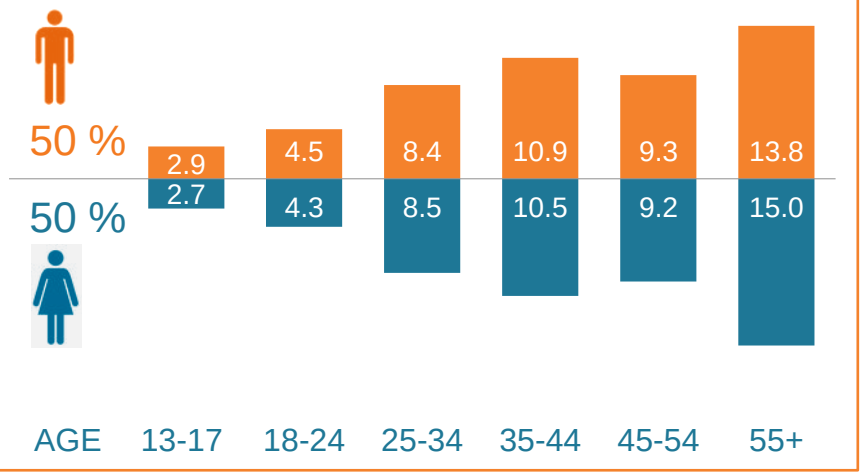


Spain

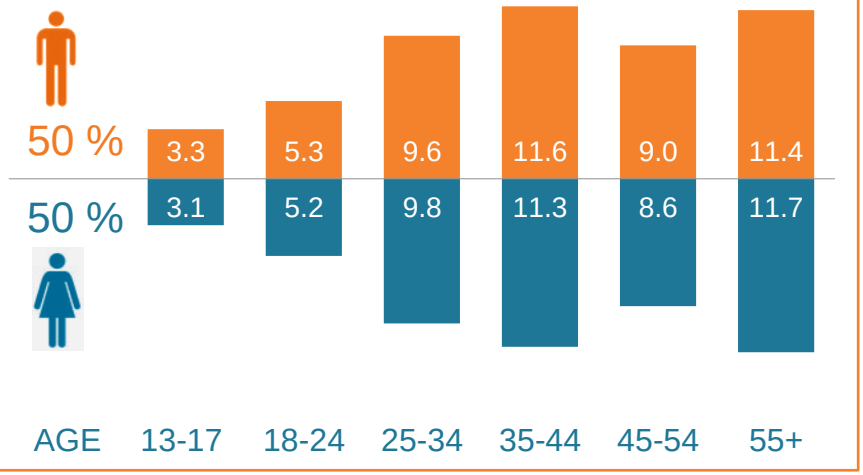


Spain

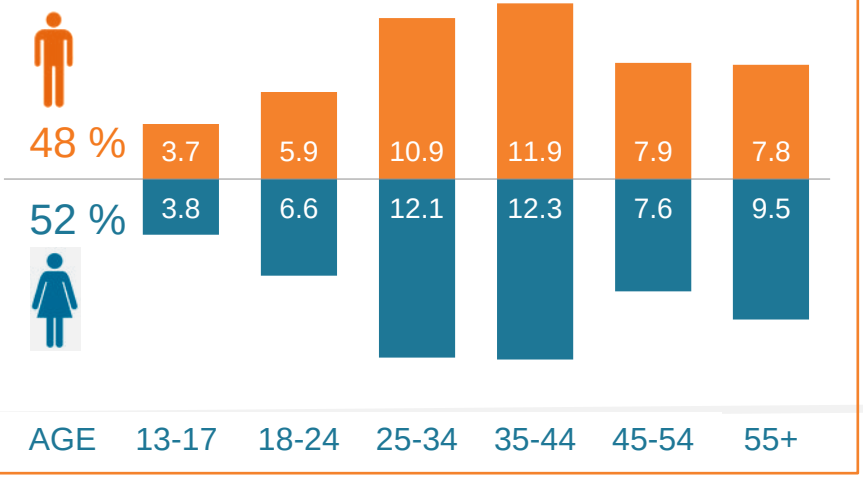
Total Mobile Audience - 36.0 million



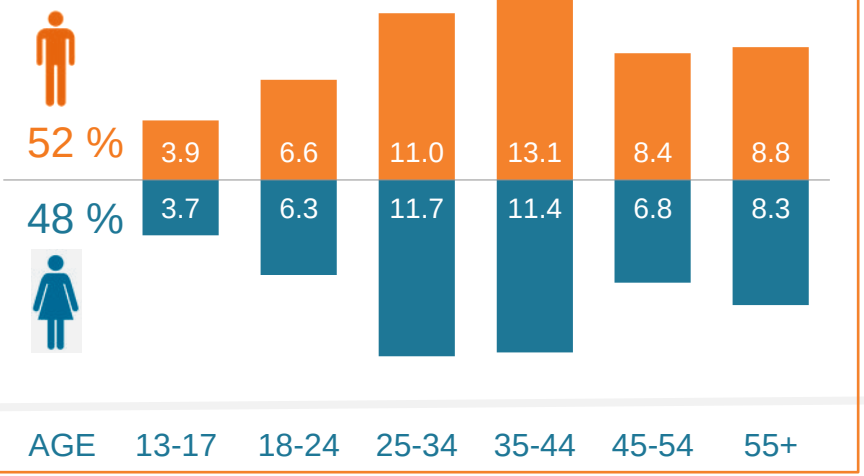
Connect to Internet - 28.6 million



Use Social Media - 18.2 million



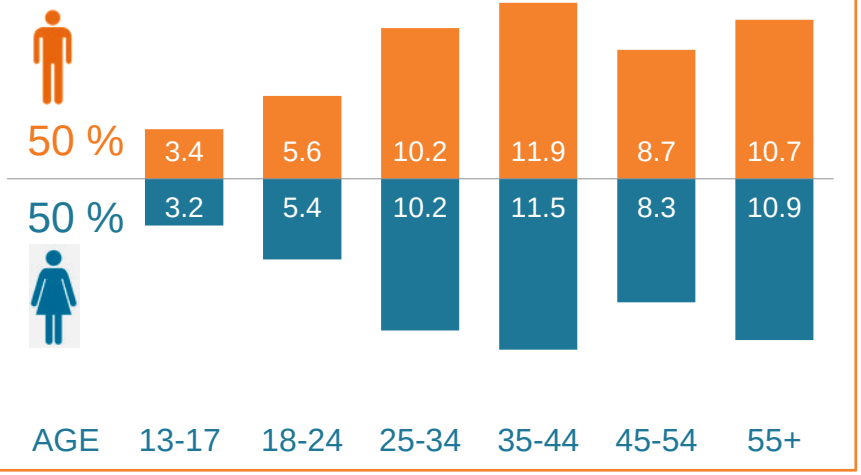
Watch Video - 12.5 million



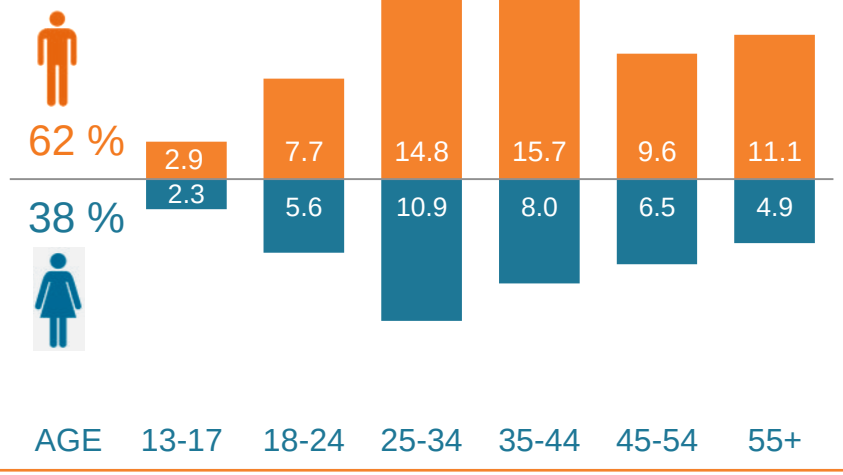
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Spain

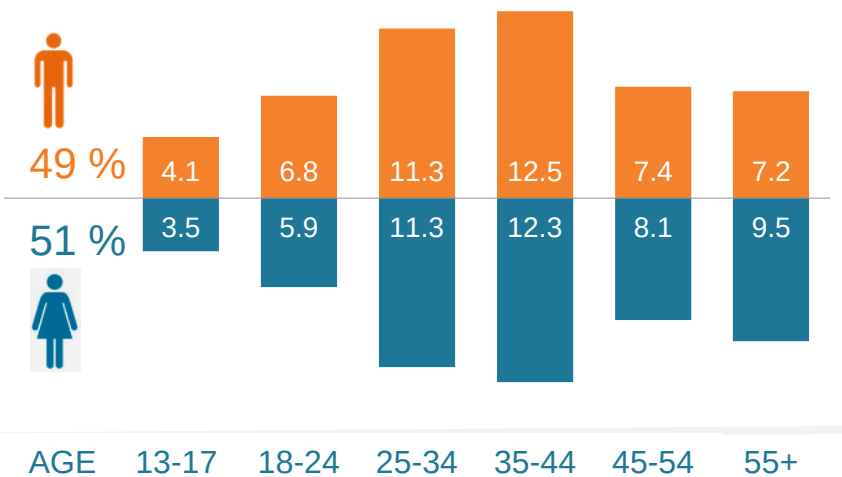
Use Application - 26.2 million



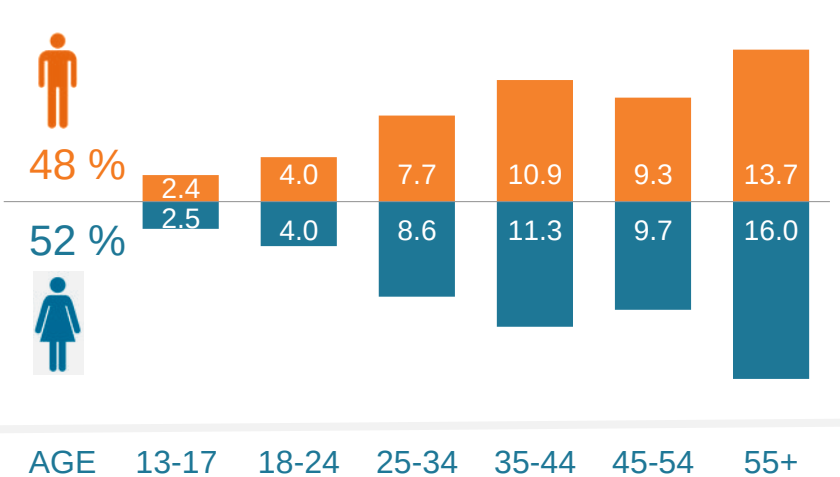
Scan QR Code - 3.9 million



Play Game - 15.4 million



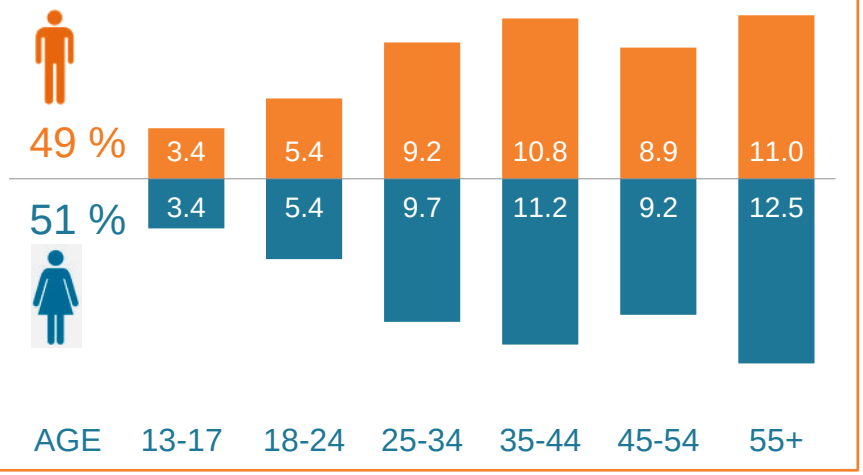
Send Text – 24.7 million



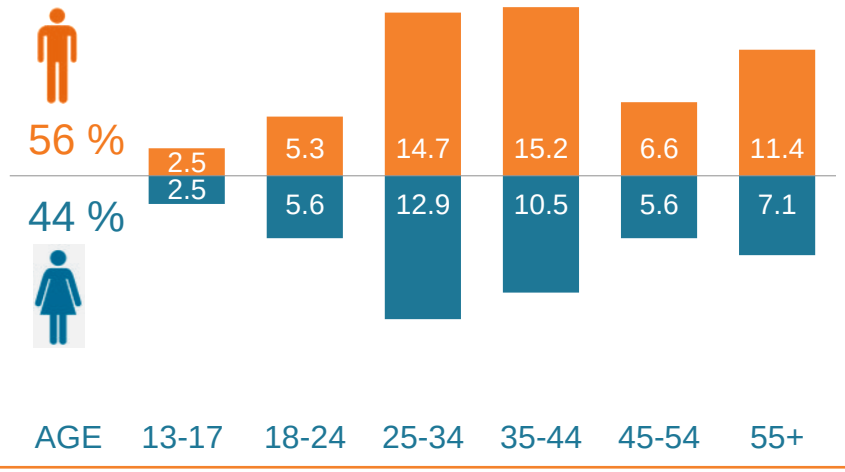
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

Spain

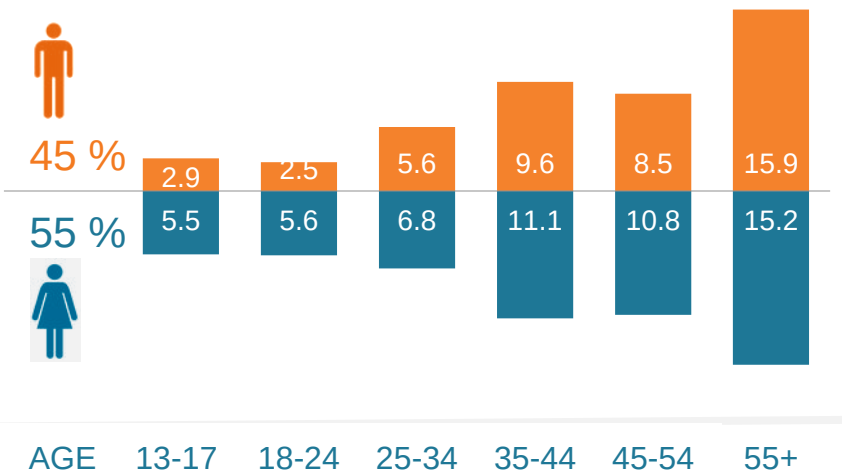
Own Android Device - 21.2 million



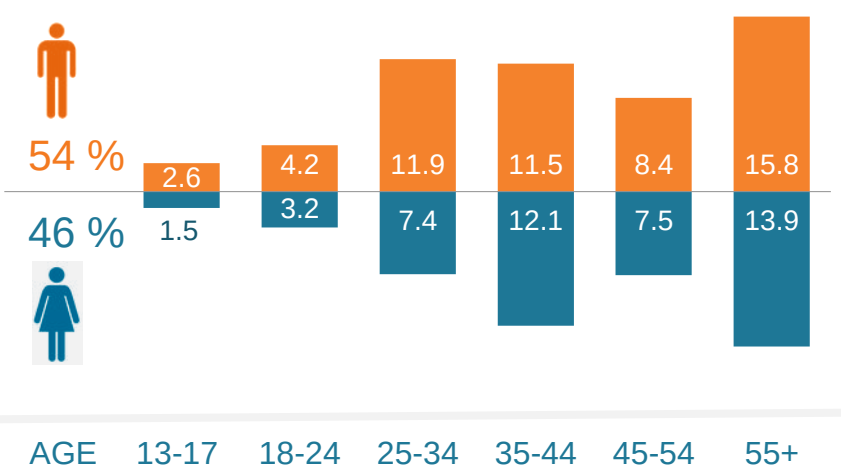
Own iPhone - 2.7 million



Own BlackBerry - 1.0 million



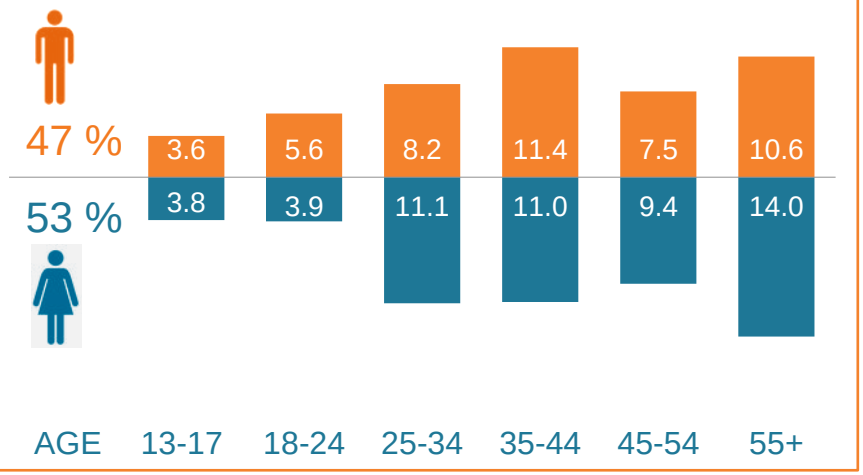
Own Windows Phone - 1.2 million



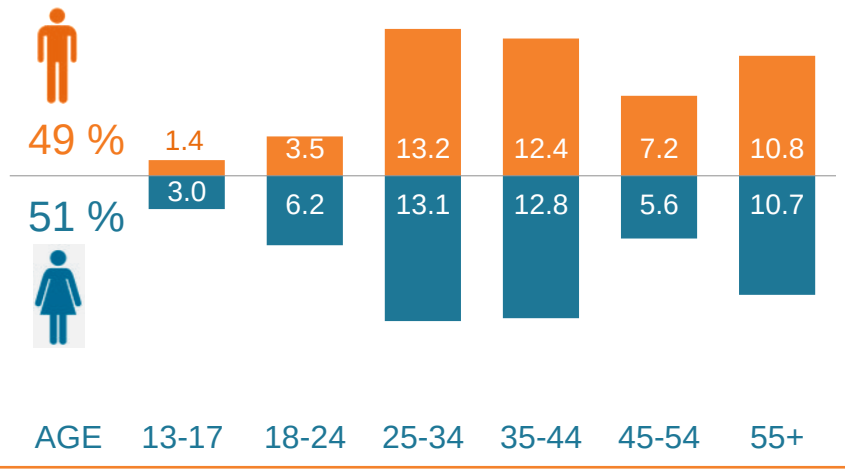
Source: comScore MobiLens™ - Data based on 3 month moving average to Dec 2013

Spain

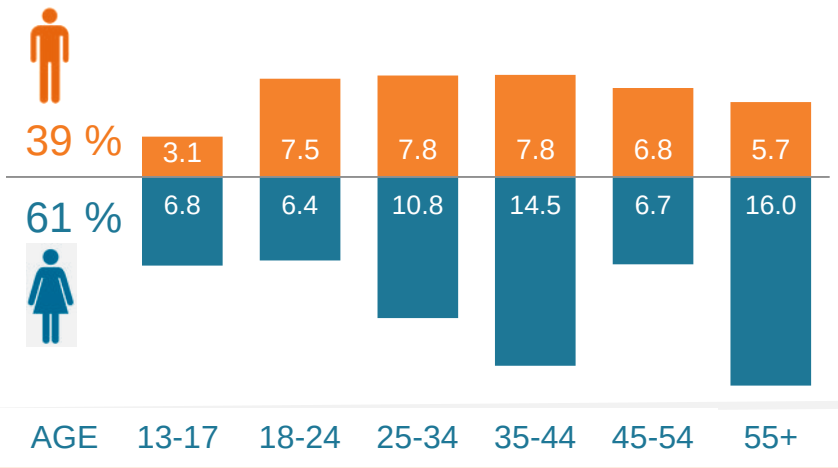
Top Samsung: Galaxy Ace S5830 - 1.9 million



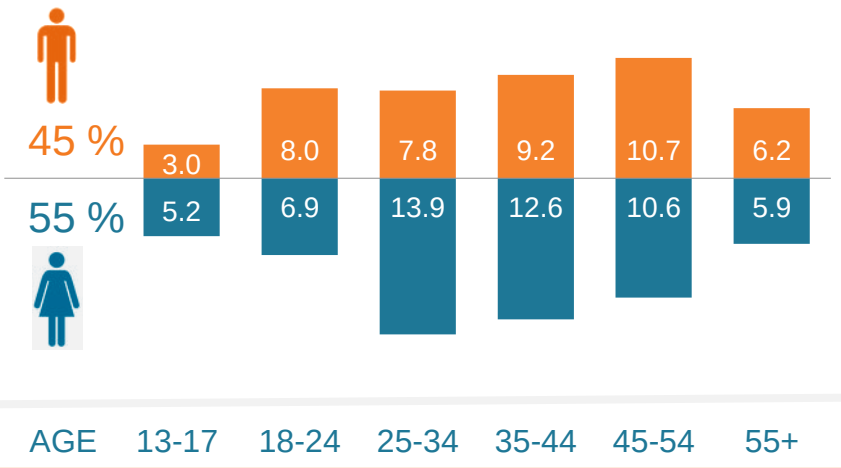
Top Apple: iPhone 4S - 0.9 million



Top Blackberry: Curve 8520 - 0.3 million



Top Sony: Xperia U - 0.6 million



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

Stay Up To Date With The Latest Insights, Research and Industry Opinion



comScore Insights

2013 has been another eventful year in the life of mobile as continued innovation in devices, apps and online services lay the groundwork for 2014 and beyond. For a look at the present and the future visit comScore's Insights section for key trends and analysis.

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