

Mobile Barometer

Q2 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 indispensable 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 second 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

Summary Q2 2013: Total Audience



Millions	UK	Germany	France	Italy	Spain
Installed Base	49.5	61.0	47.5	48.0	36.0
Access internet	34.7	34.9	26.8	28.8	26.6
Use Social Media	23.1	18.3	14.6	16.7	16.9
Watch Video	13.0	12.6	8.1	11.6	11.2
Use Application	31.8	31.5	22.2	24.9	24.0
Scan QR Code	3.4	6.5	4.0	3.5	3.9
Play Game	19.2	19.4	9.0	17.8	13.5
Send Text	45.3	47.9	42.1	40.5	25.8
Own Android Phone	17.7	22.4	14.7	13.7	18.3
Own iPhone	9.9	6.9	6.2	4.5	2.6
Own BlackBerry Phone	3.5	0.6	1.9	1.0	1.4
Own Windows Phone	2.0	2.0	1.6	2.4	0.9
Own Tablet	13.1	8.7	7.7	7.3	6.4

Summary Q2 2013: Penetration

	UK	Germany	France	Italy	Spain
Installed Base	49.5	61.0	47.5	48.0	36.0
Access internet	70%	57%	56%	60%	74%
Use Social Media	47%	30%	31%	35%	47%
Watch Video	26%	21%	17%	24%	31%
Use Application	64%	52%	47%	52%	67%
Scan QR Code	7%	11%	8%	7%	11%
Play Game	39%	32%	19%	37%	38%
Send Text	92%	79%	89%	84%	72%
Own Android Phone	36%	37%	31%	29%	51%
Own iPhone	20%	11%	13%	9%	7%
Own BlackBerry Phone	7%	1%	4%	2%	4%
Own Windows Phone	4%	3%	3%	5%	2%
Own Tablet	26%	14%	16%	15%	18%

Summary Q2 2013: Change From Q1

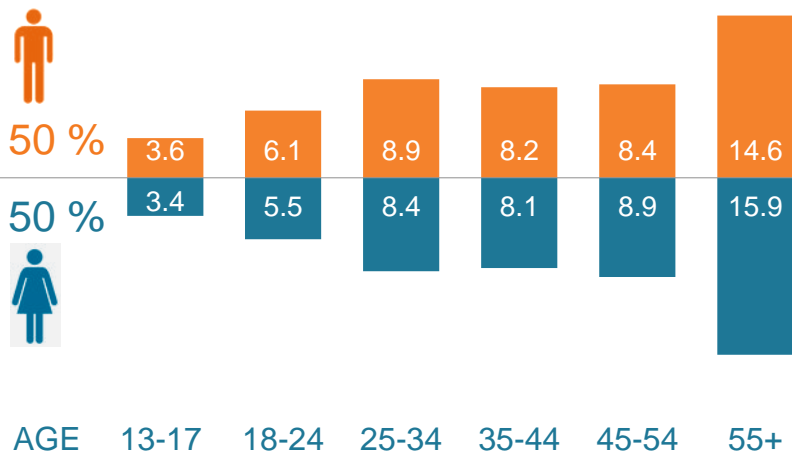
	UK	Germany	France	Italy	Spain
Installed Base	49.5	61.0	47.5	48.0	36.0
Access internet	2%	6%	2%	6%	8%
Use Social Media	3%	3%	3%	6%	10%
Watch Video	5%	4%	1%	10%	9%
Use Application	3%	7%	1%	7%	8%
Scan QR Code	2%	7%	16%	5%	20%
Play Game	-4%	0%	-1%	2%	5%
Send Text	0%	0%	-1%	1%	2%
Own Android Phone	6%	14%	4%	16%	14%
Own iPhone	6%	-5%	3%	5%	7%
Own BlackBerry Phone	-15%	2%	-9%	-9%	-12%
Own Windows Phone	37%	18%	23%	11%	4%
Own Tablet	21%	15%	7%	18%	22%



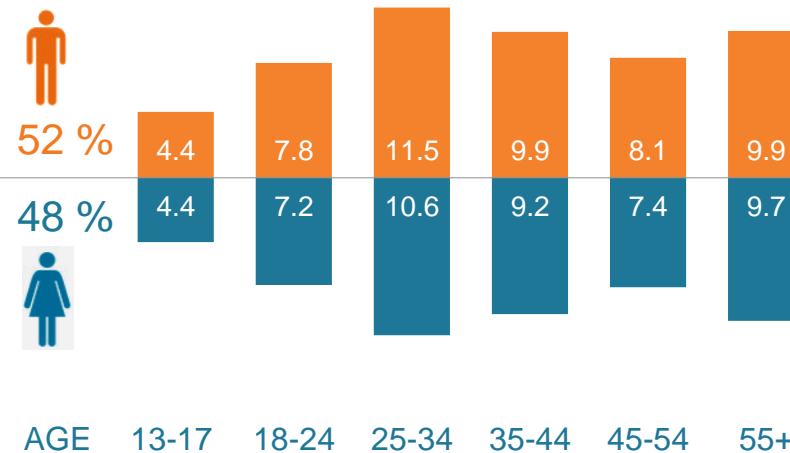
United Kingdom



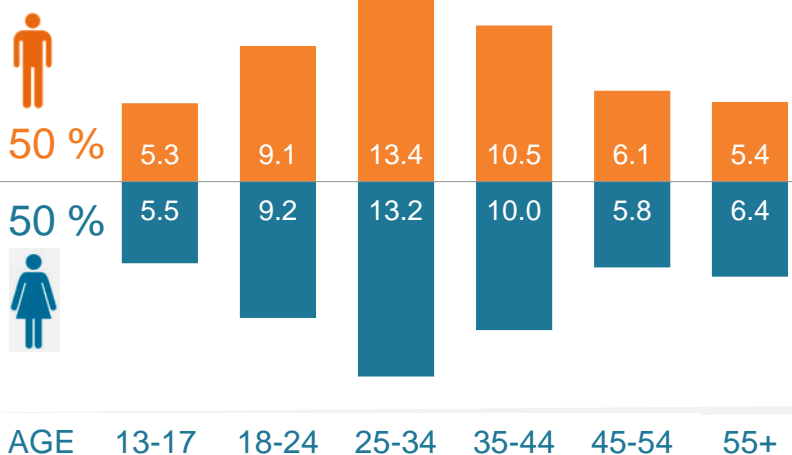
Total Mobile Audience - 49.5 million



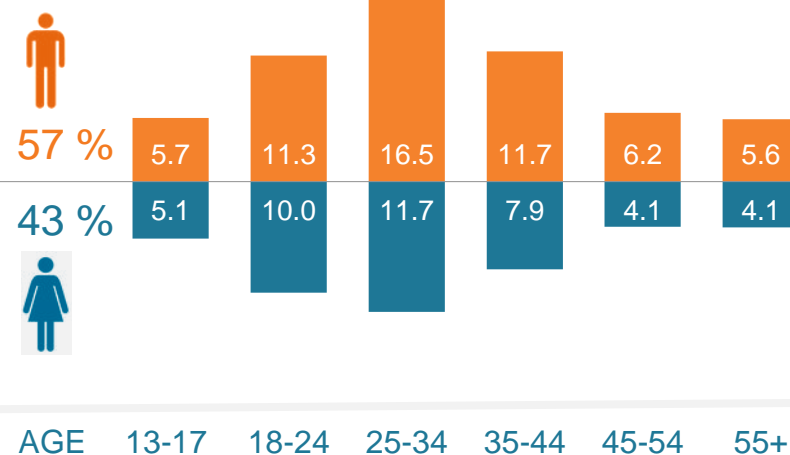
Connect to Internet - 34.7 million

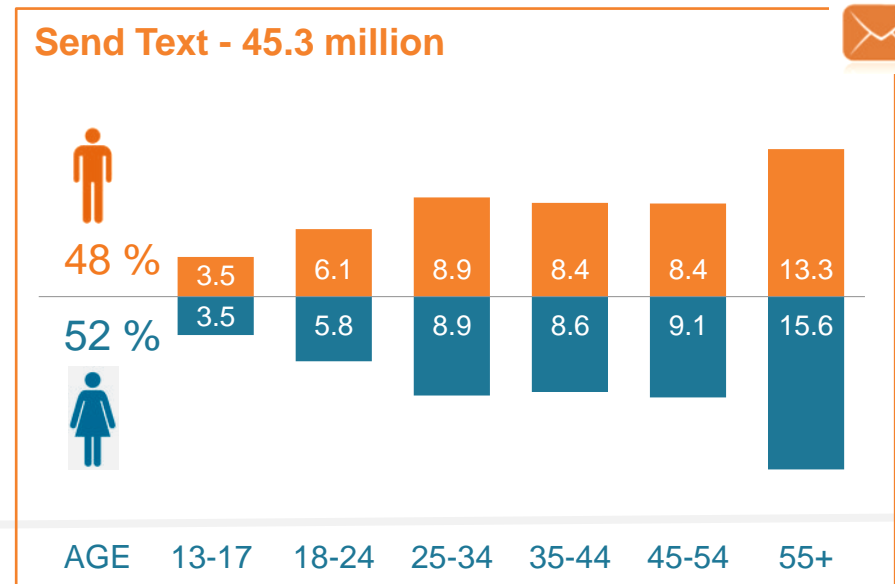
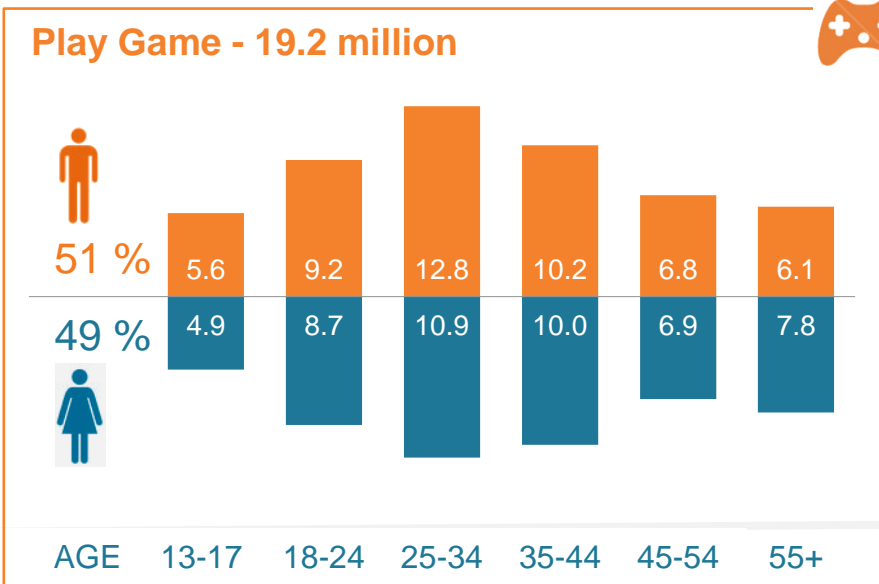
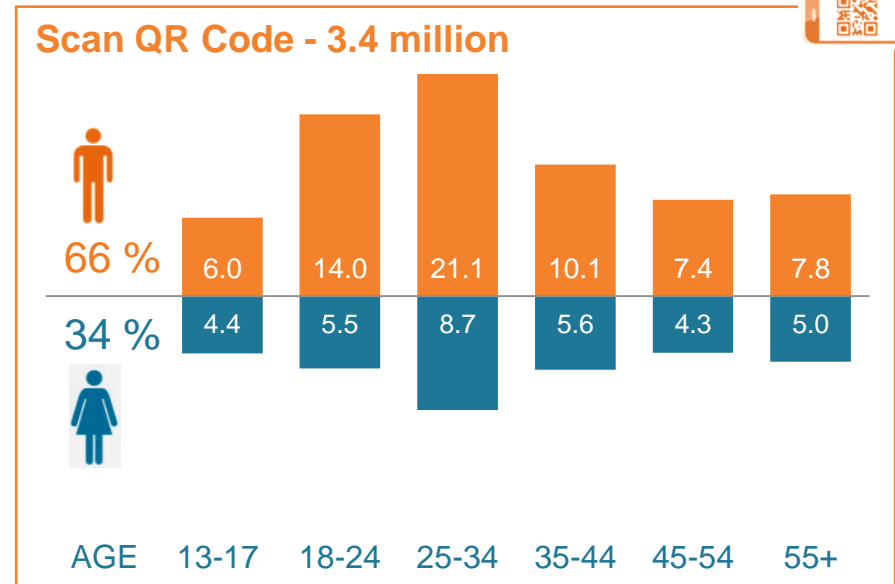
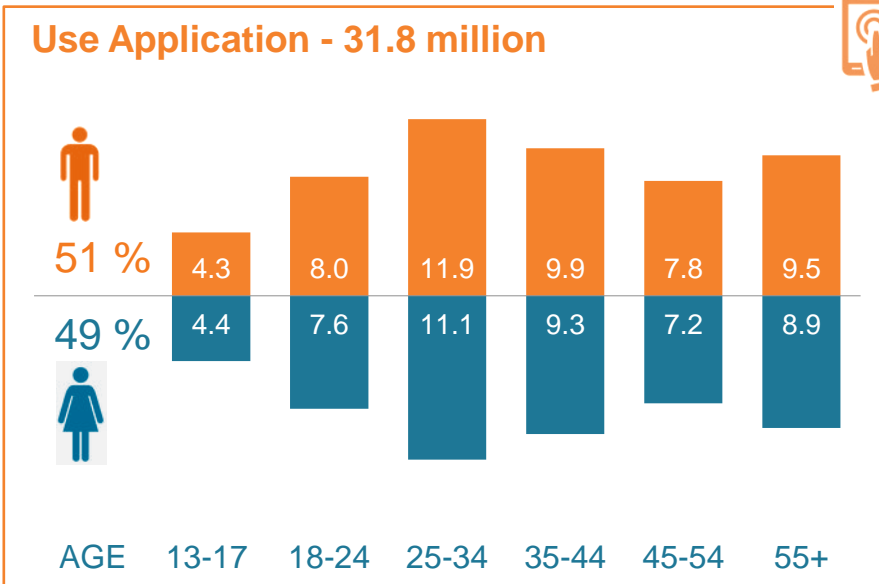


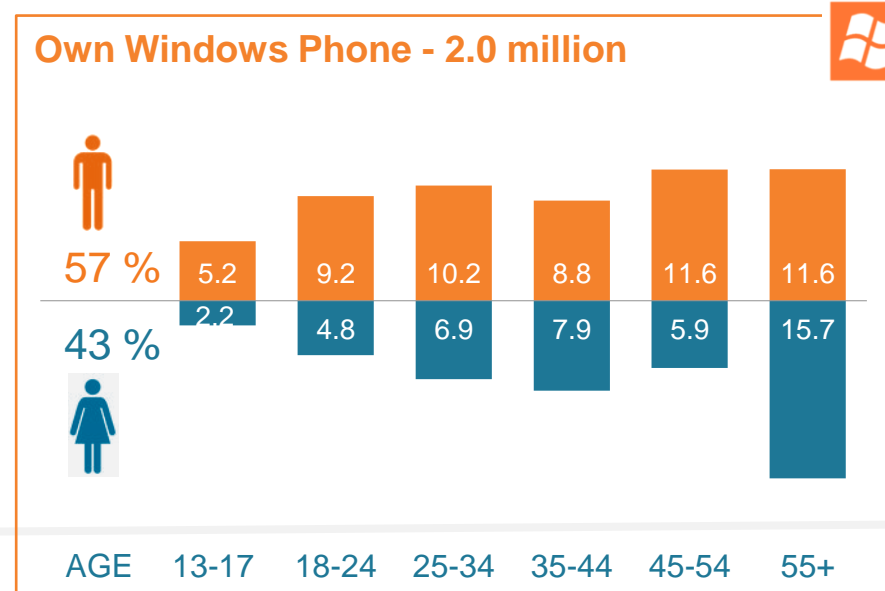
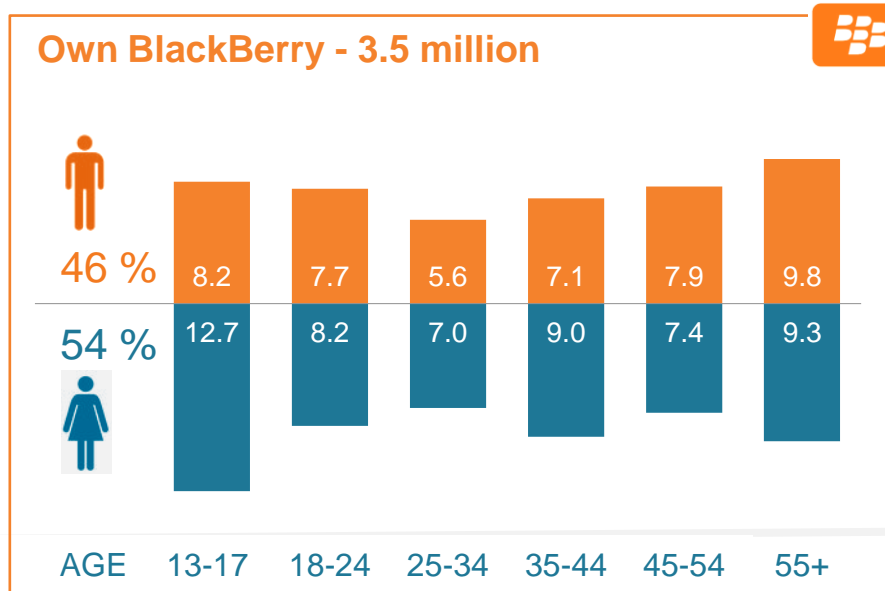
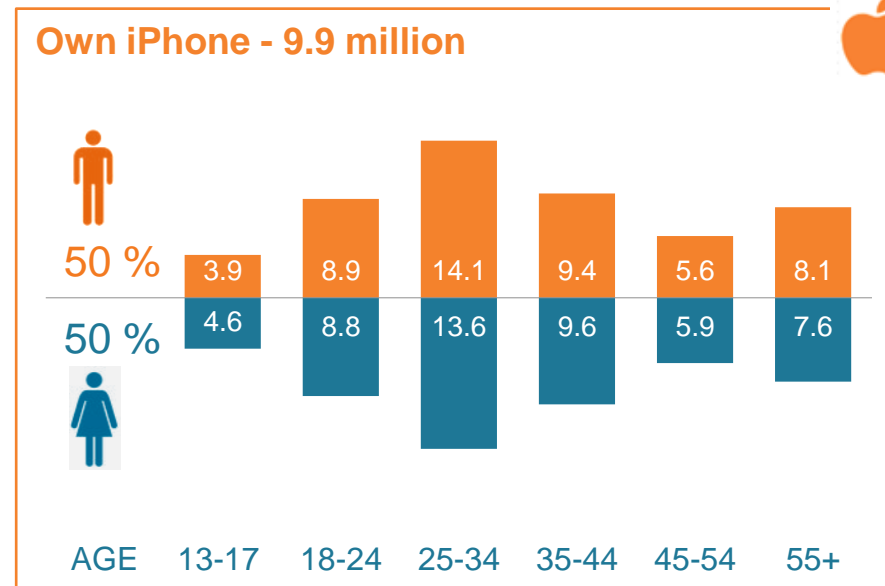
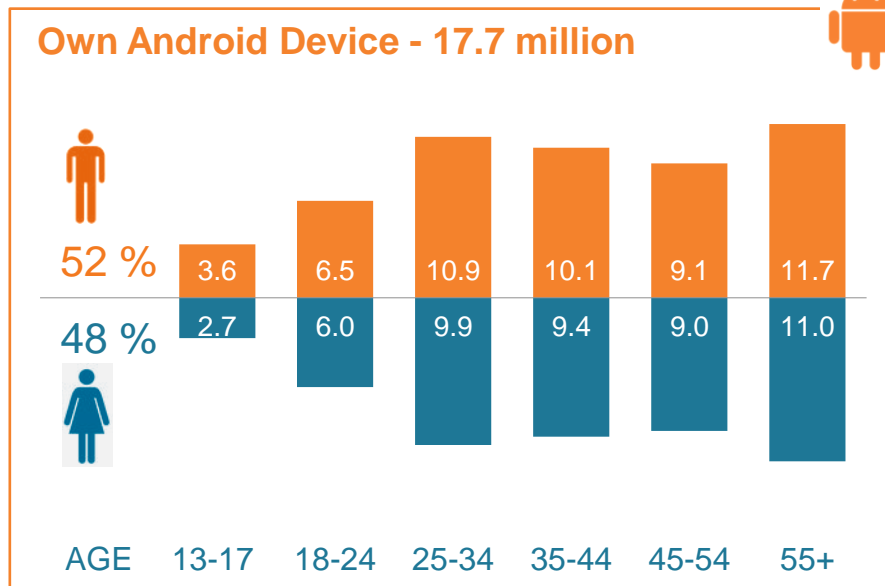
Use Social Media - 23.1 million



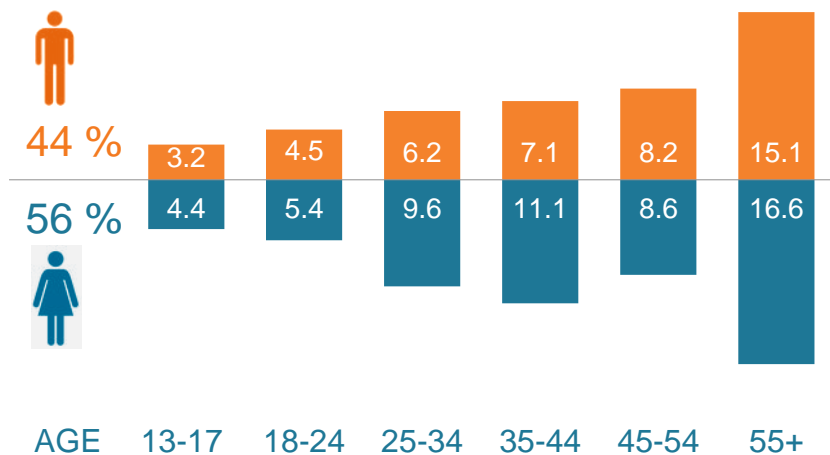
Watch Video - 13.0 million



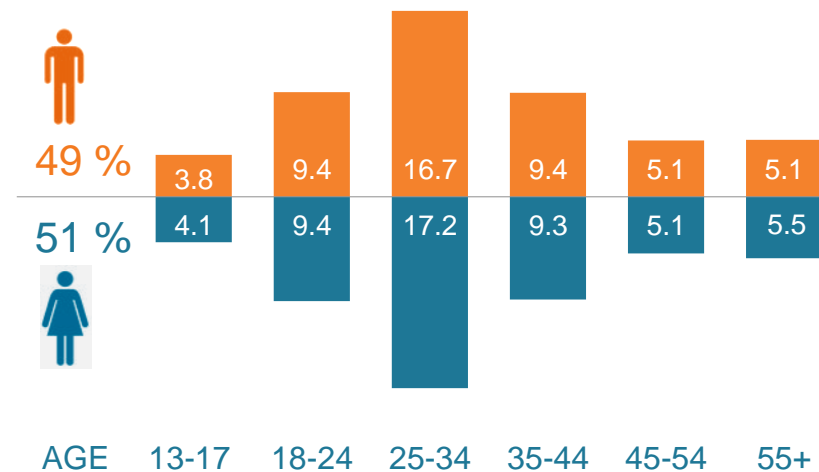




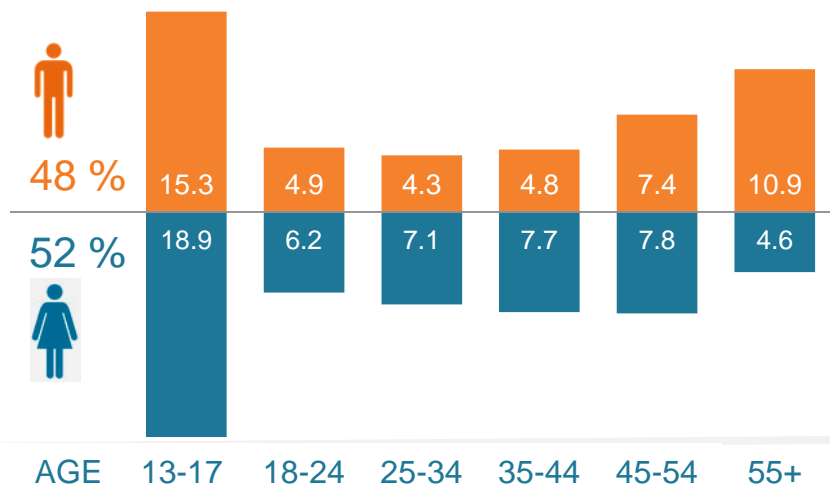
Top Samsung: Galaxy Ace - 2.3 million



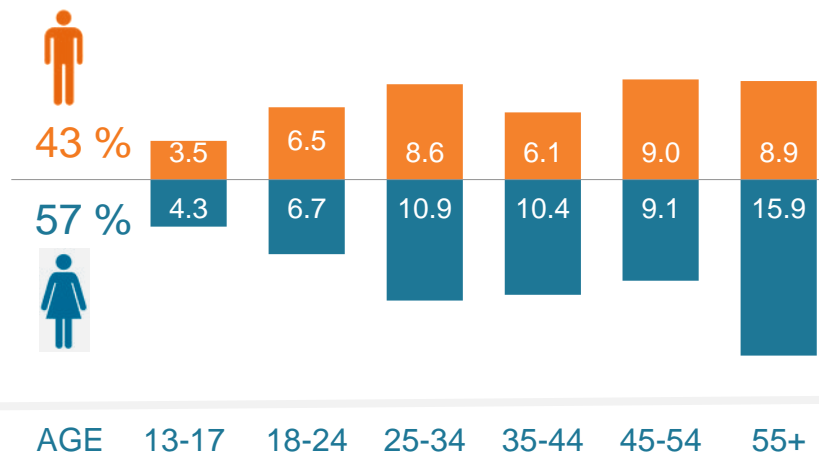
Top Apple: iPhone 4S - 2.3 million



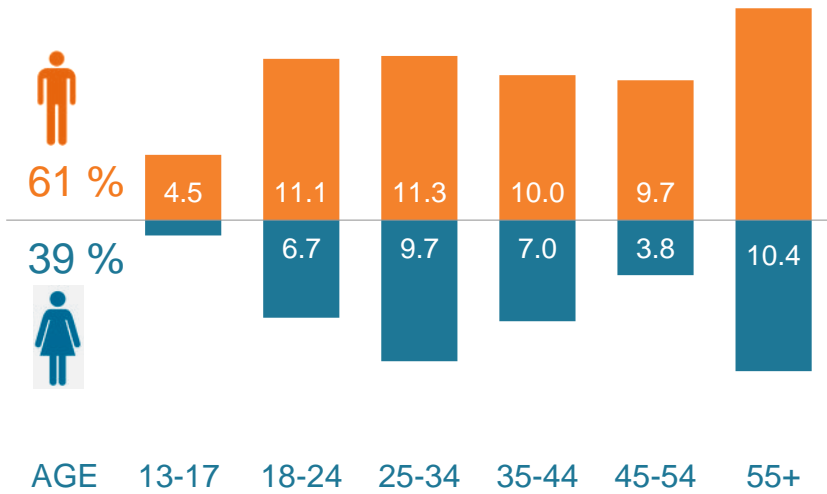
Top Blackberry: Curve 9320 - 0.6 million



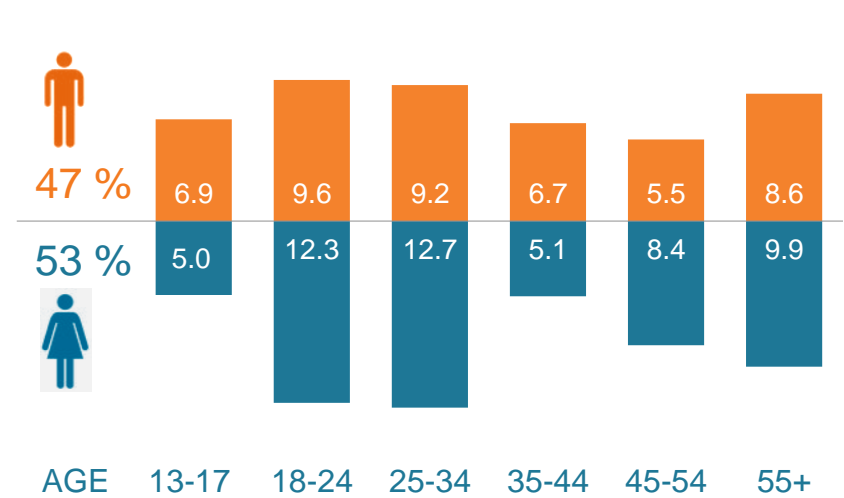
Top HTC: Wildfire S - 0.9 million



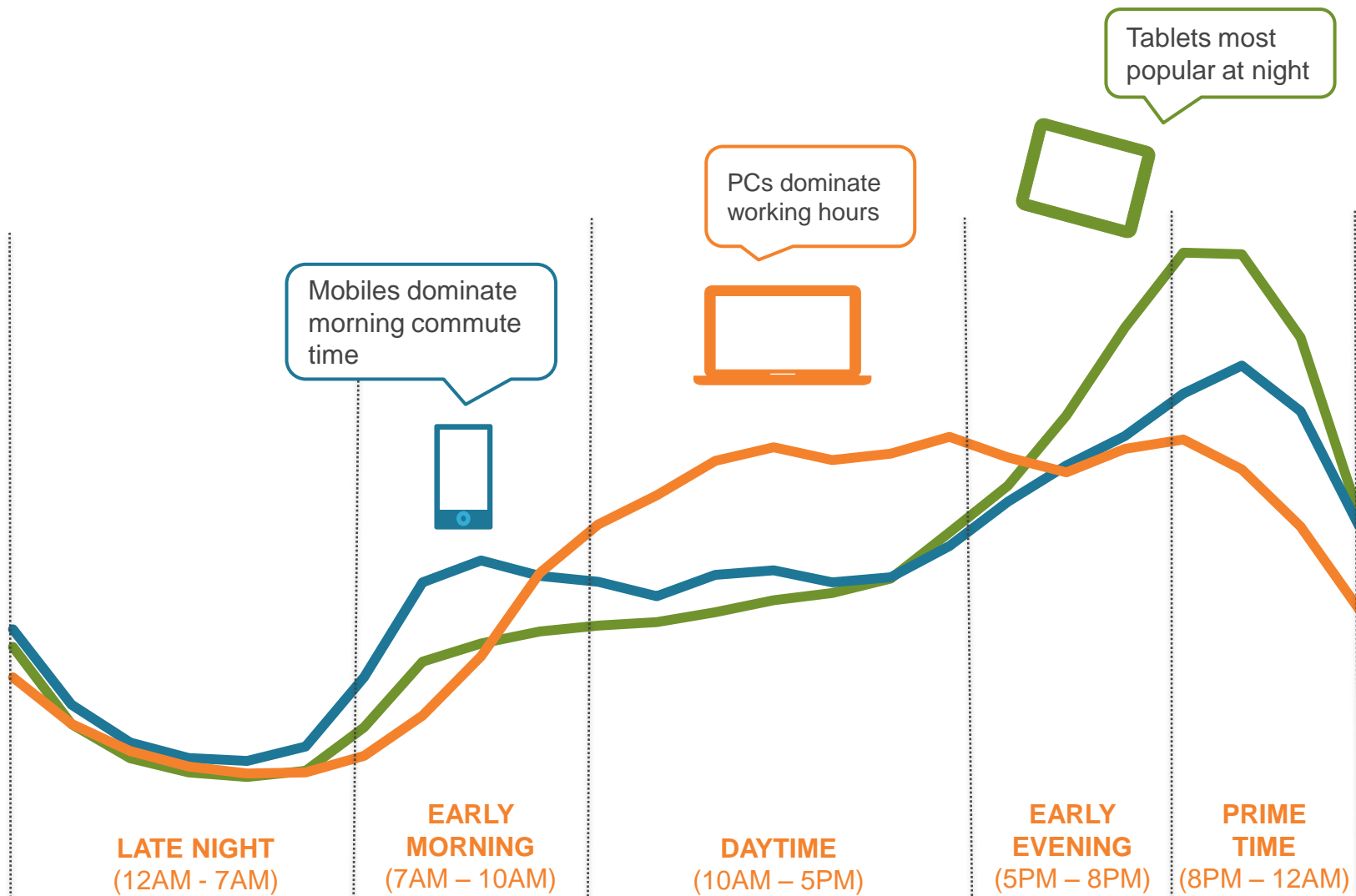
Top Nokia: Lumia 800 - 0.5 million



Top Sony: Xperia U - 0.2 million

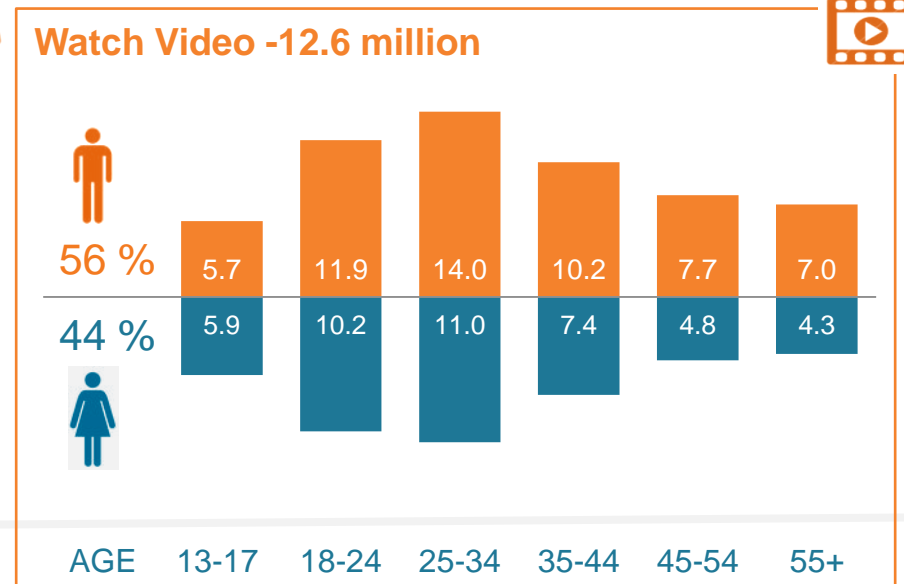
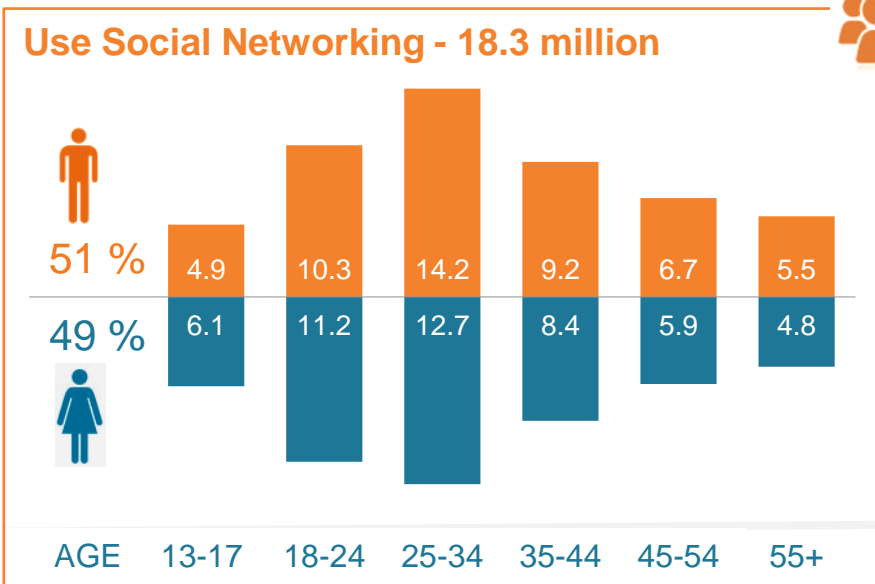
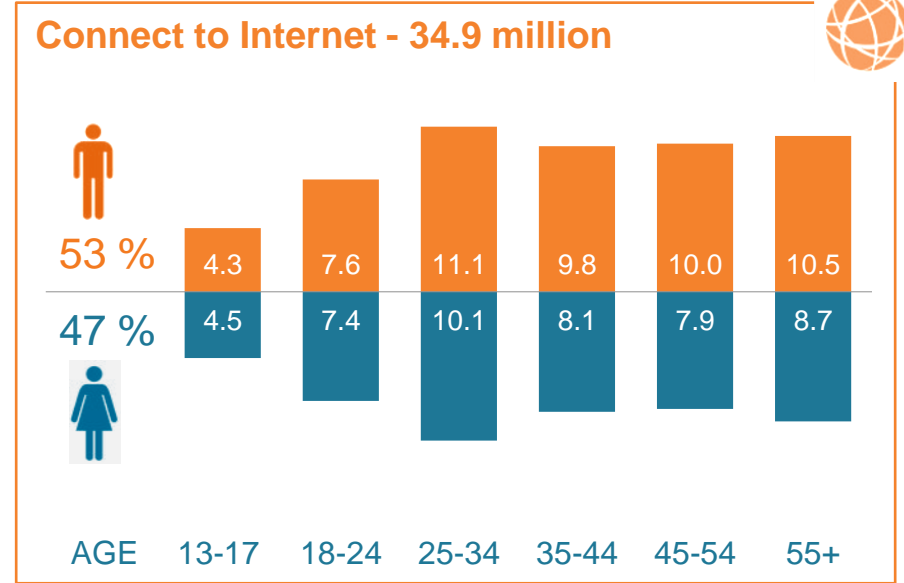
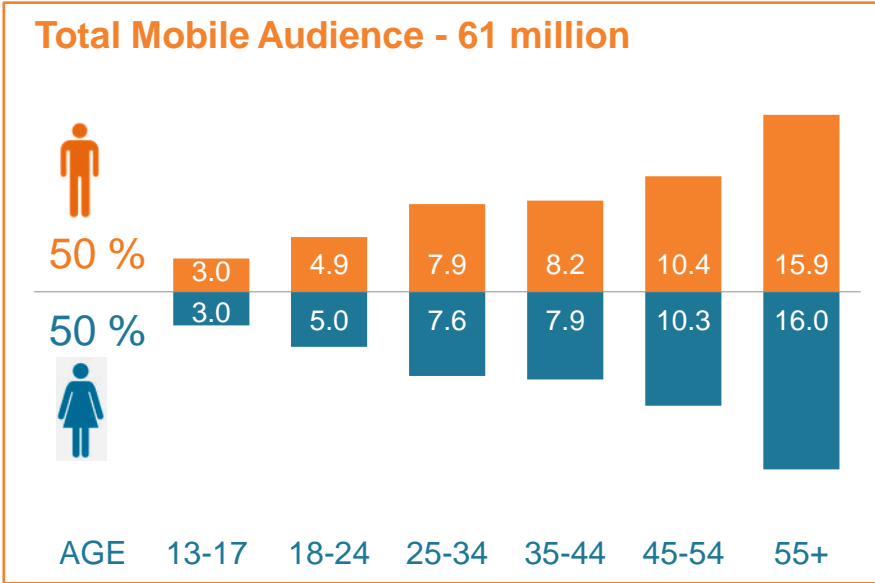


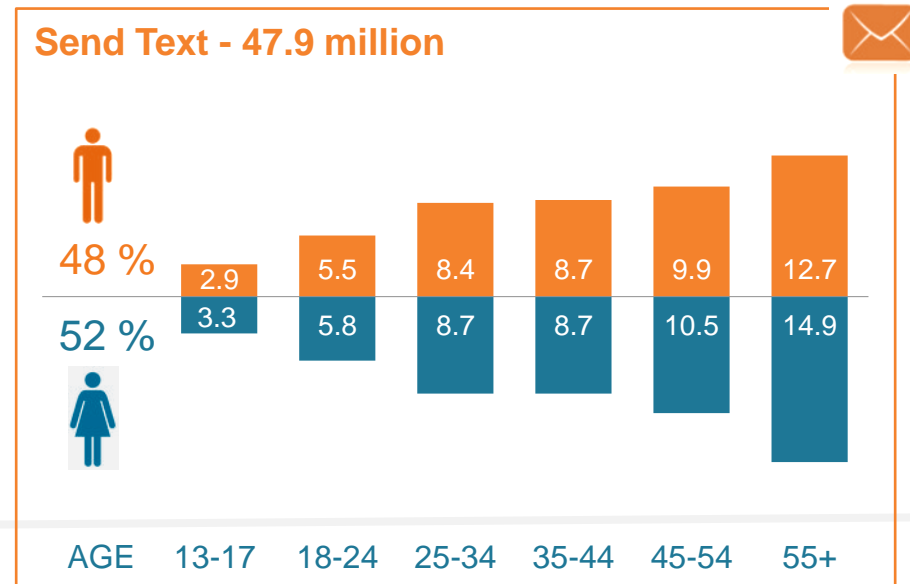
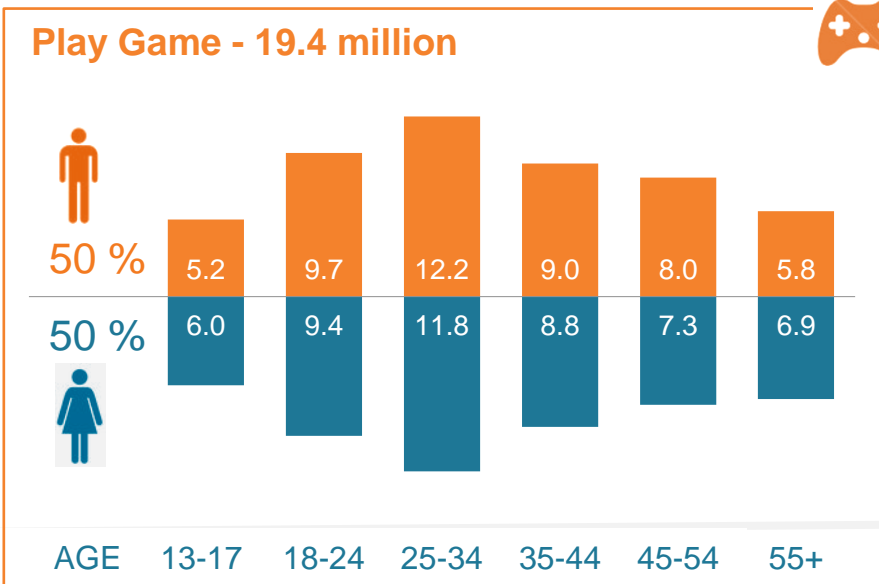
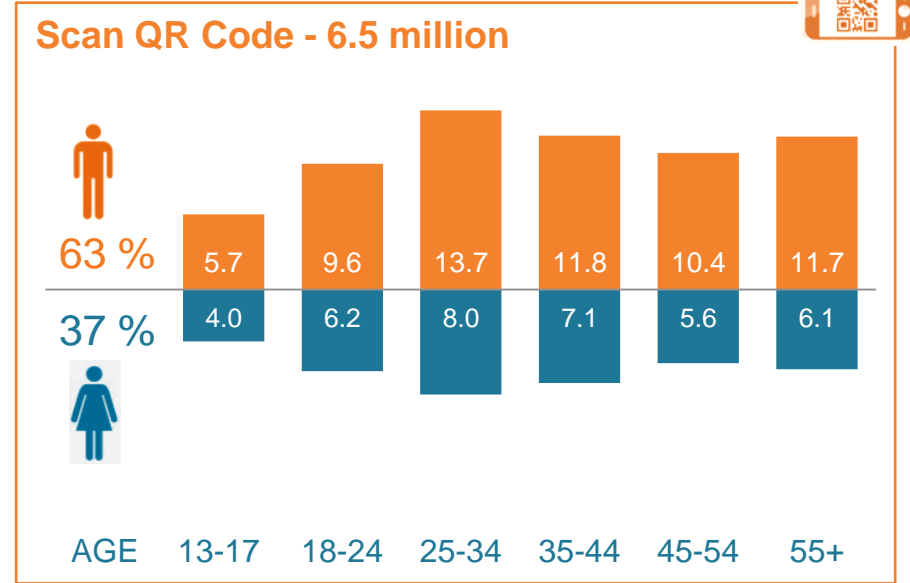
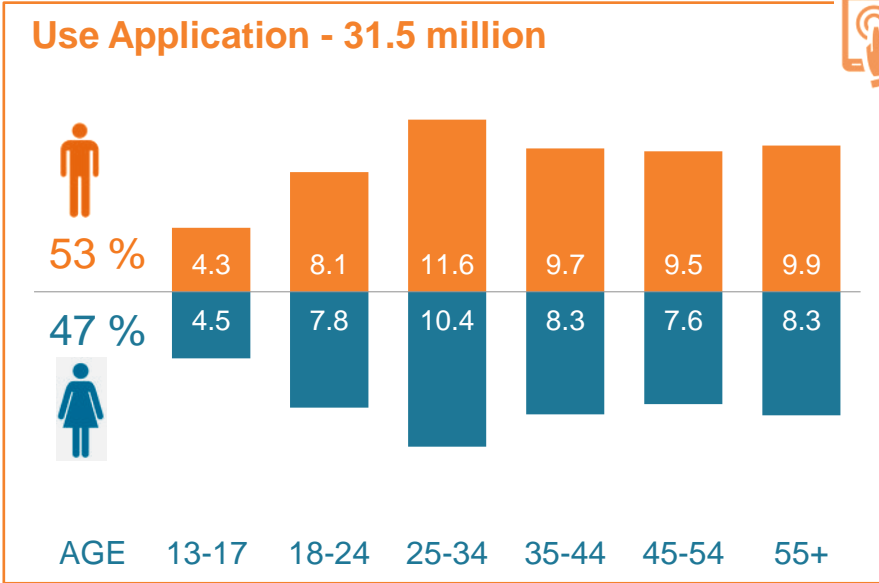
Share of Device Page Traffic on a Typical Workday

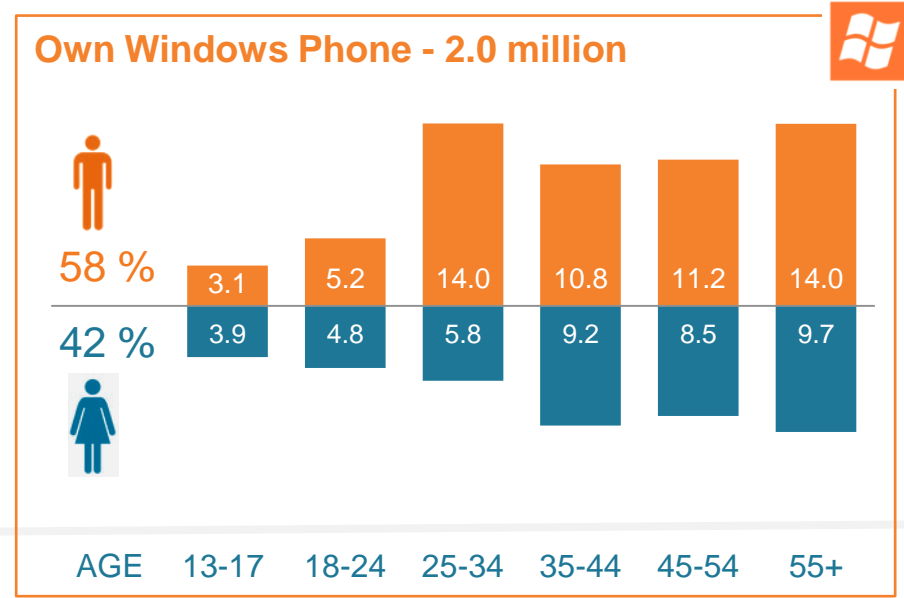
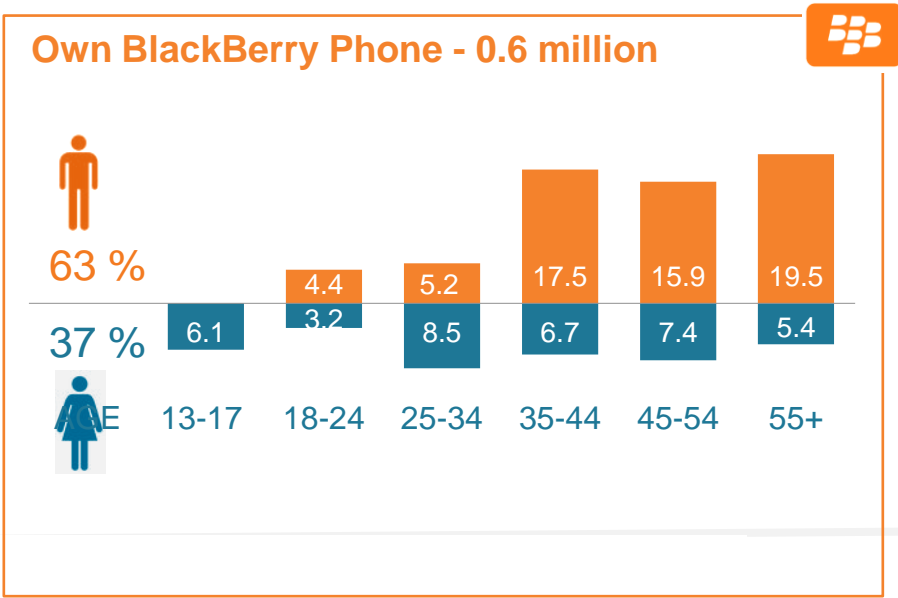
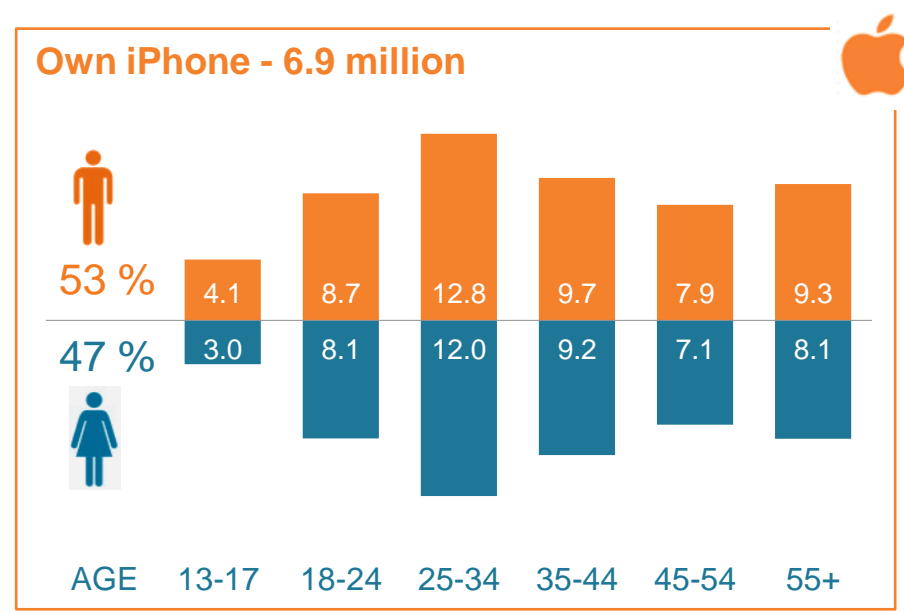
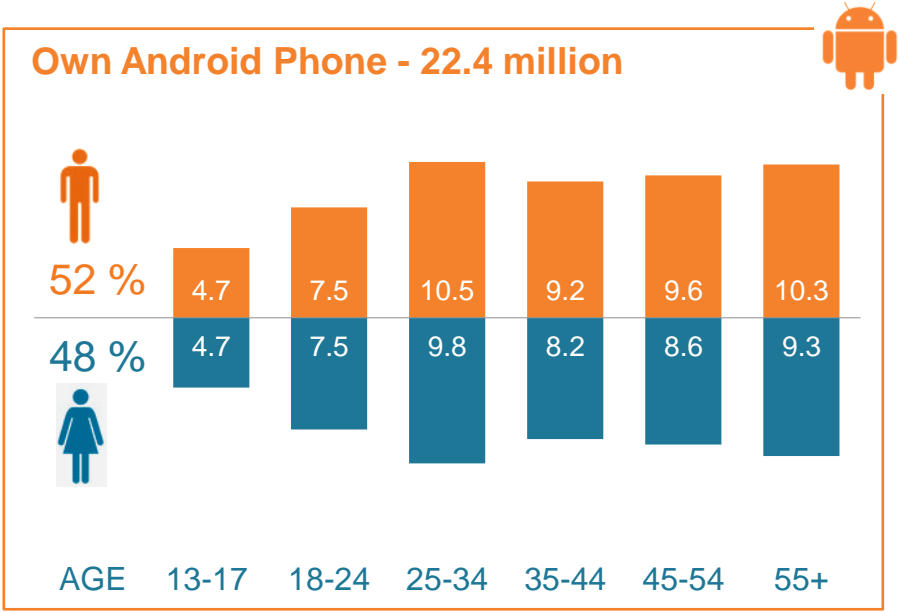


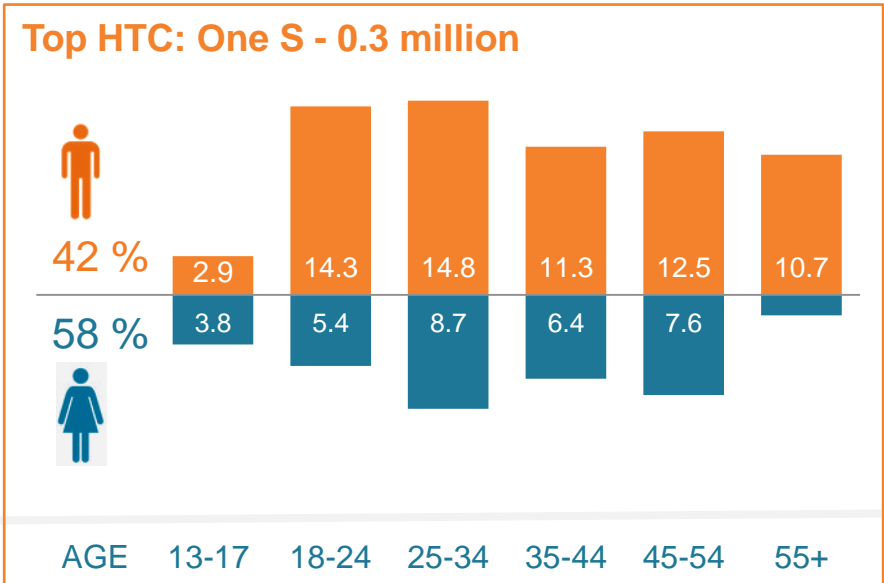
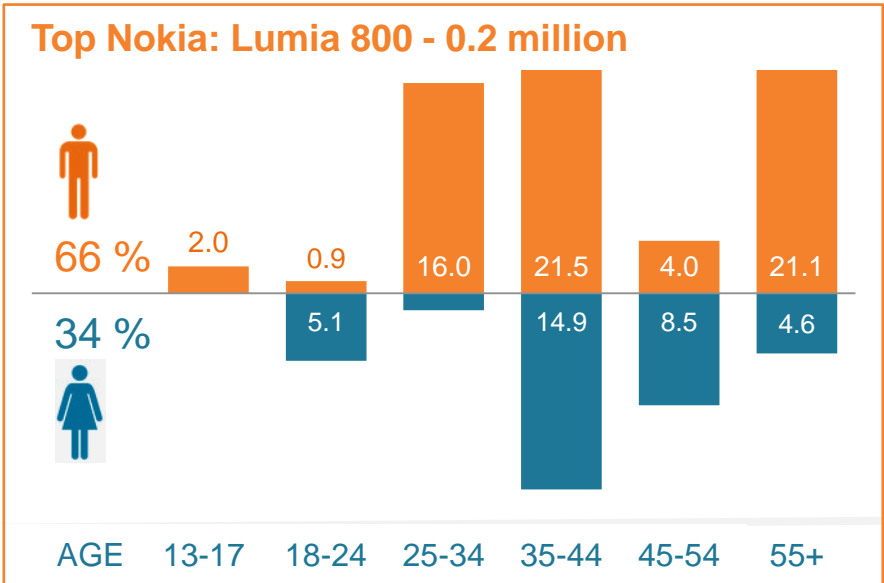
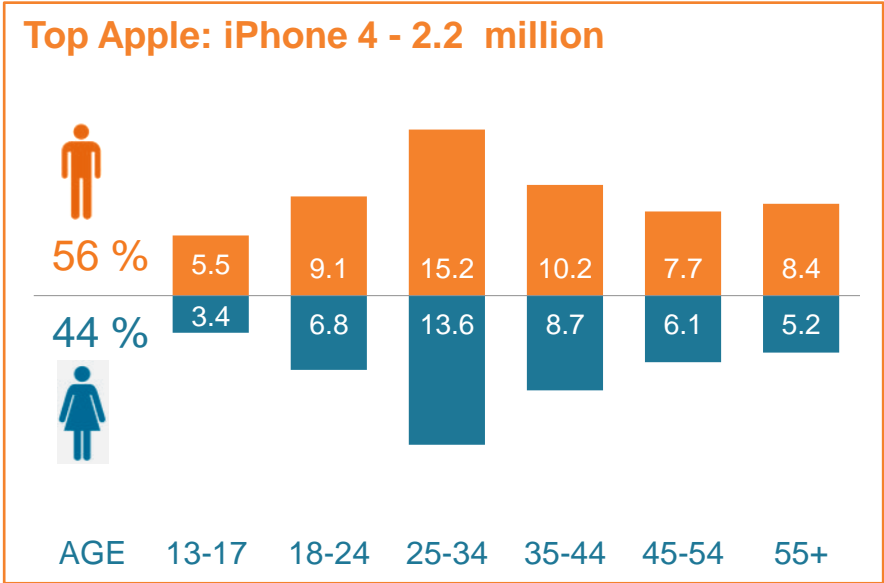
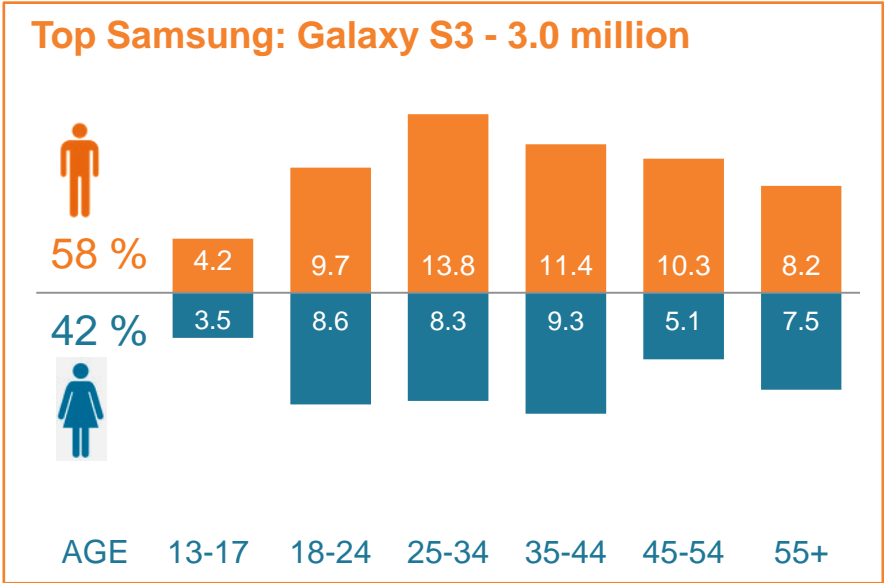
Germany







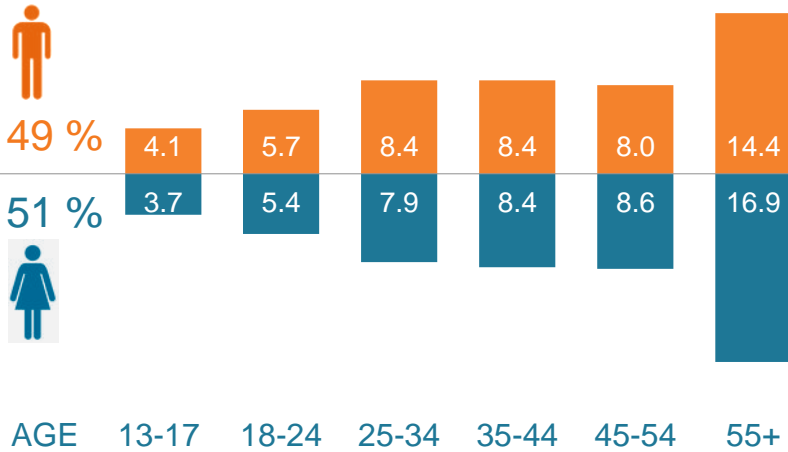




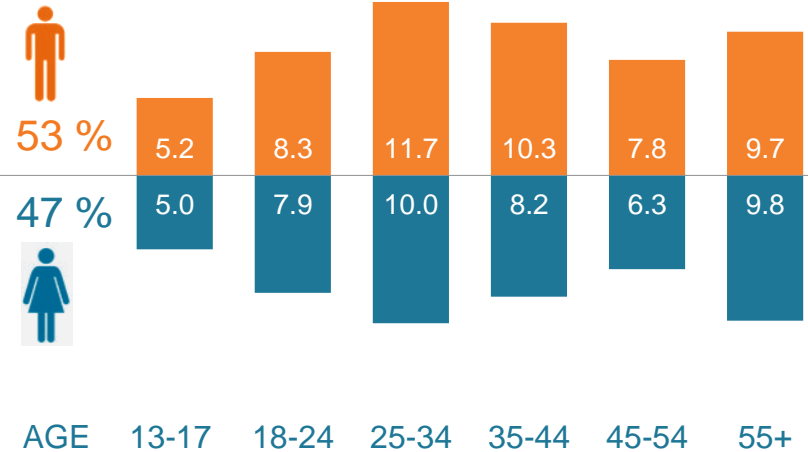
France



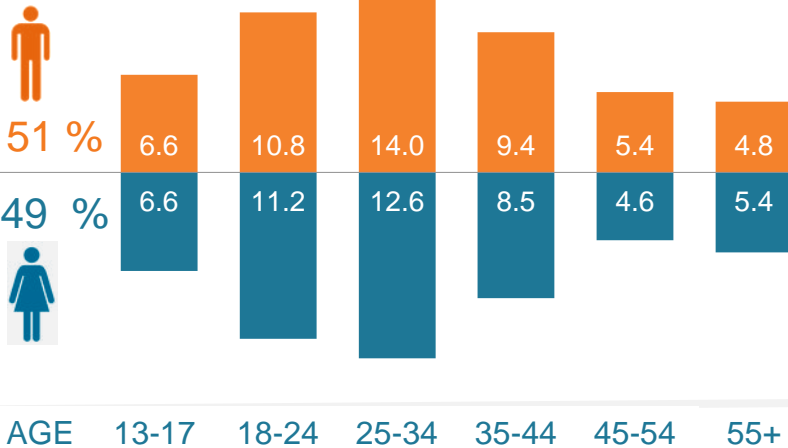
Total Mobile Audience - 47.5 million



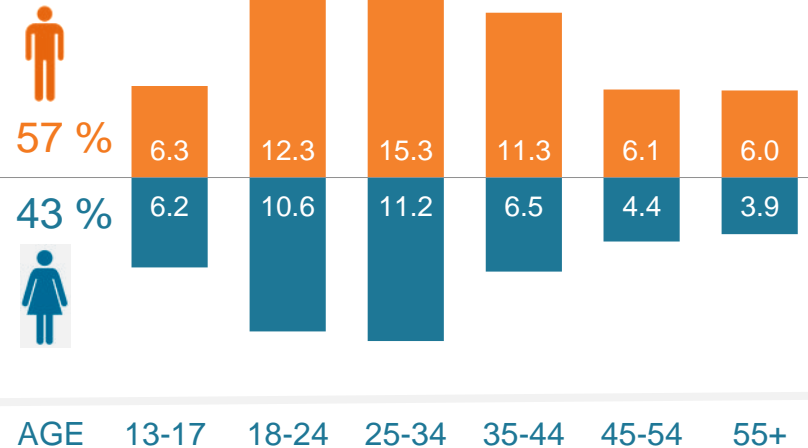
Connect to Internet - 26.8 million

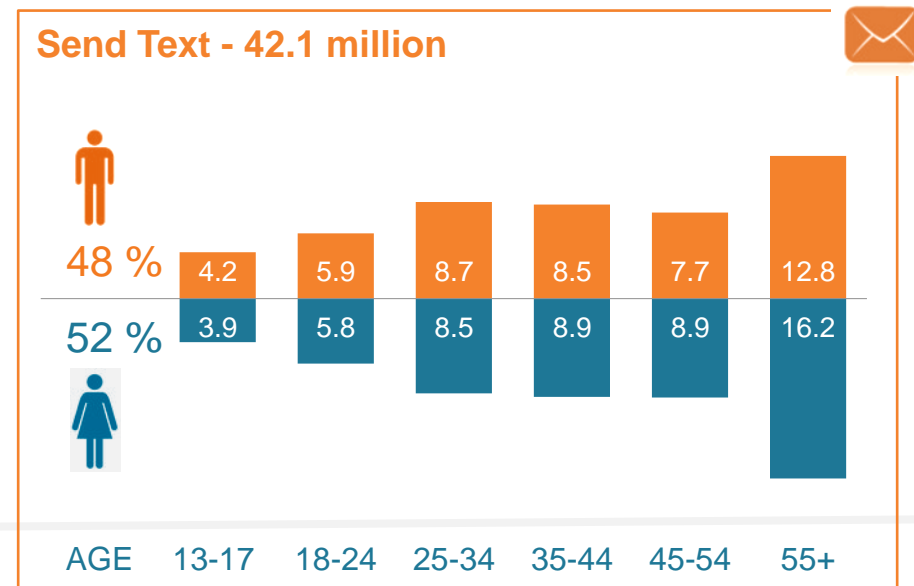
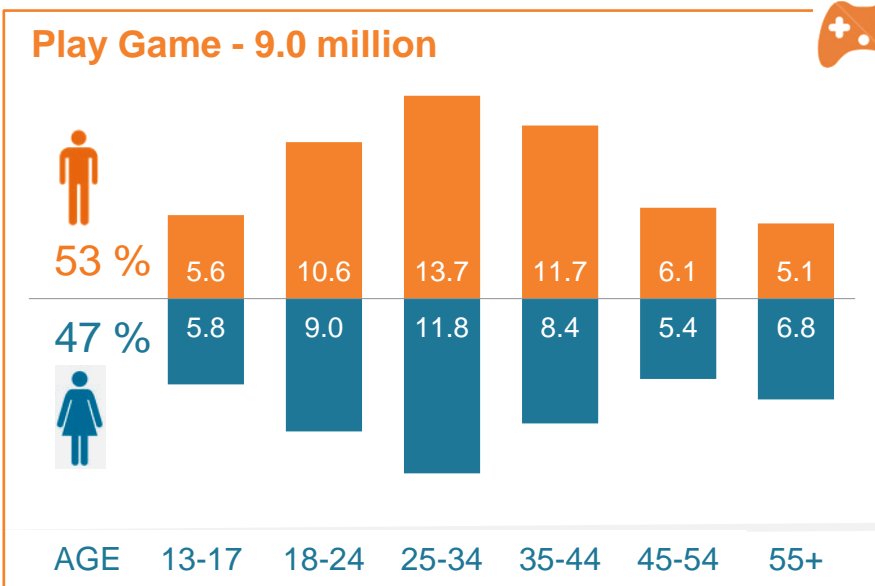
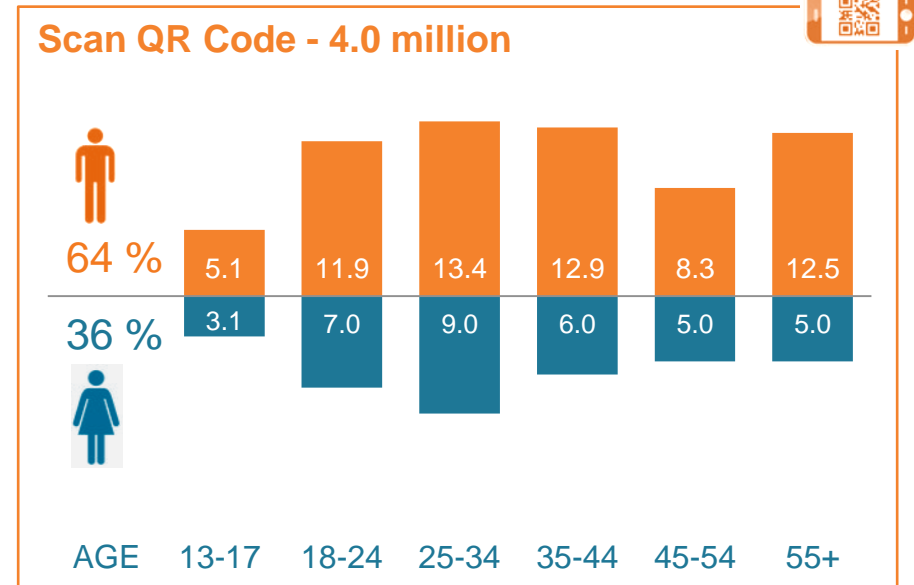
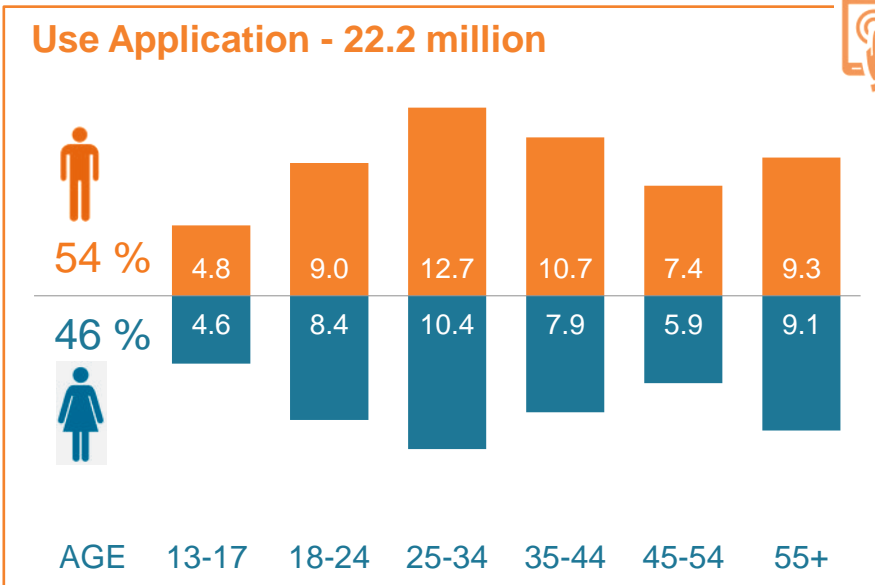


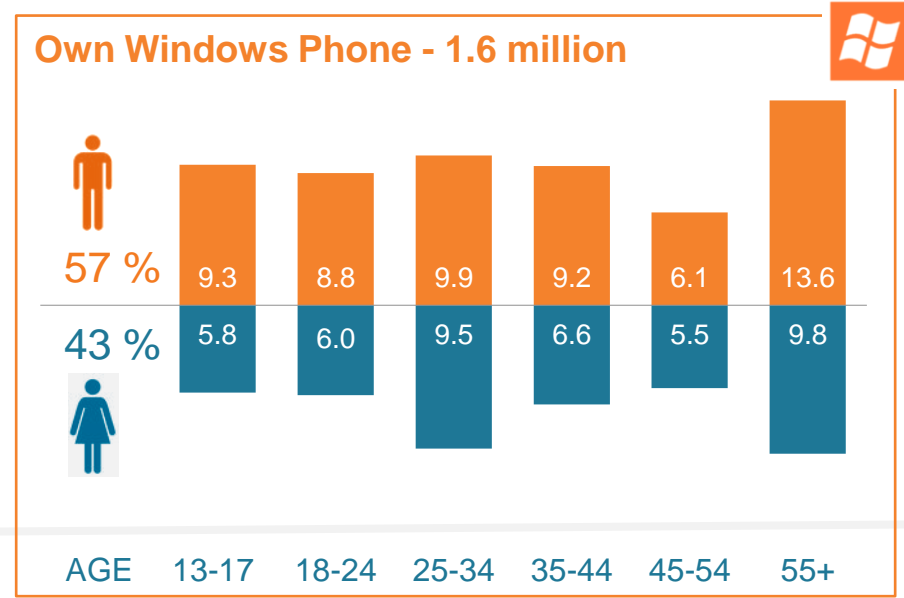
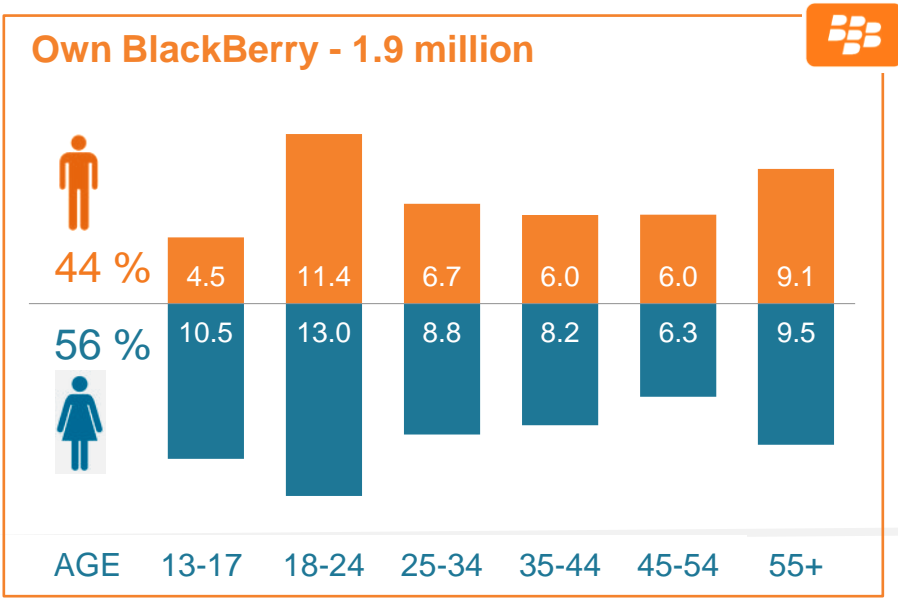
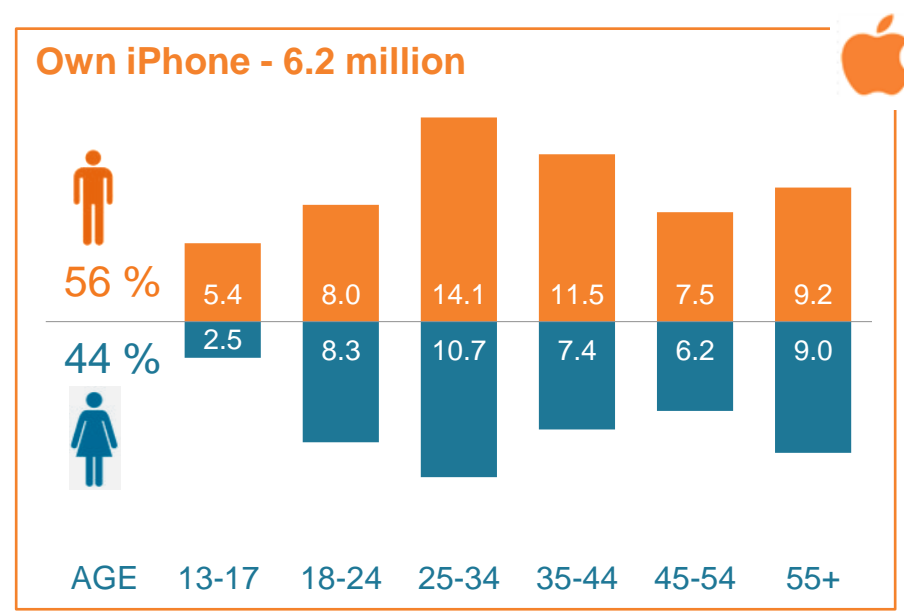
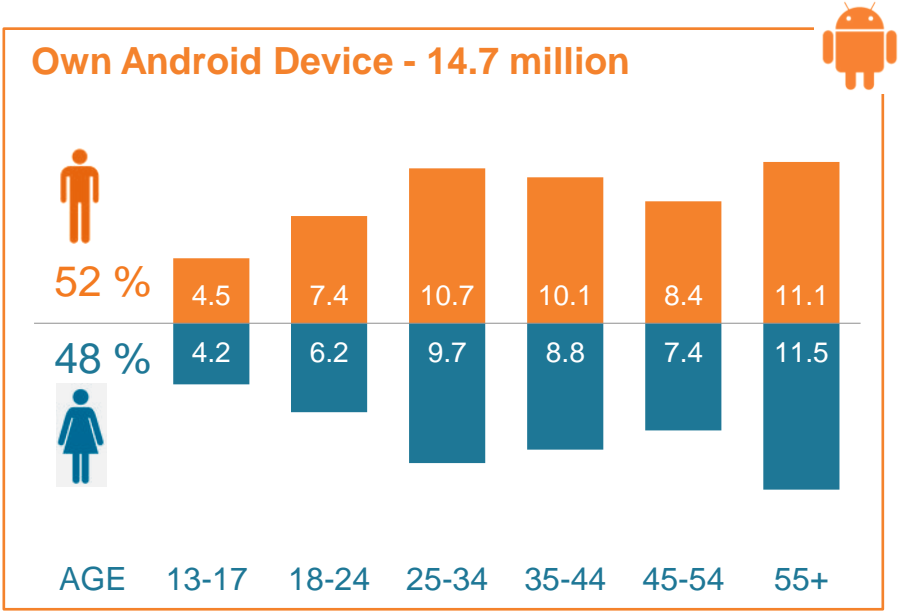
Use Social Media - 14.6 million

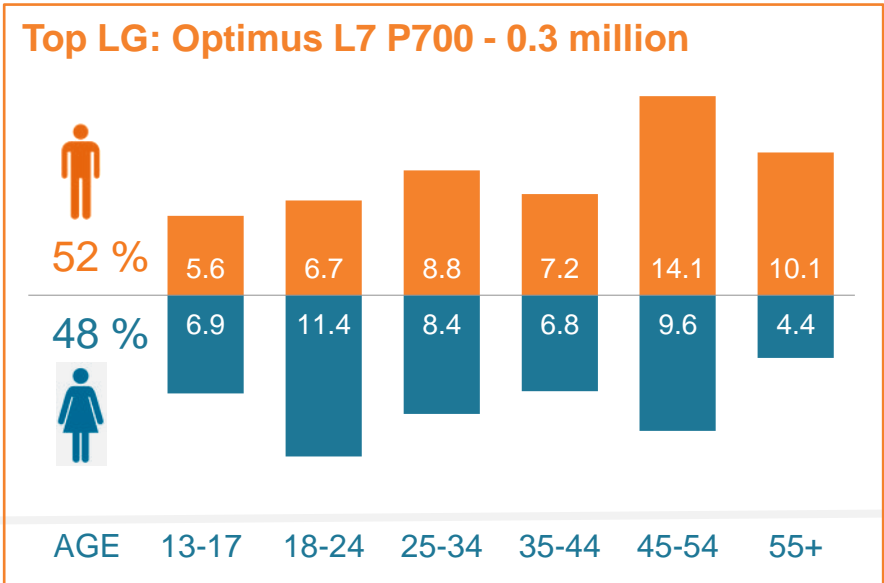
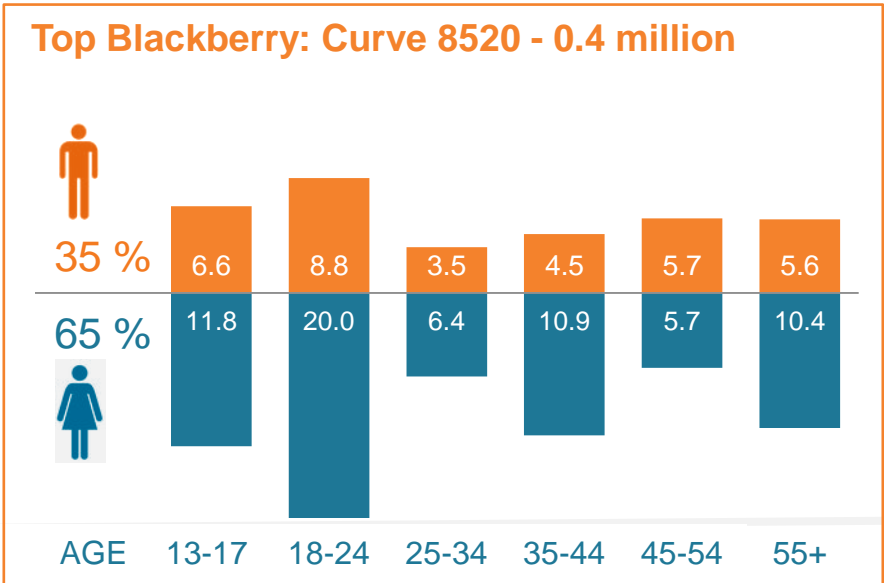
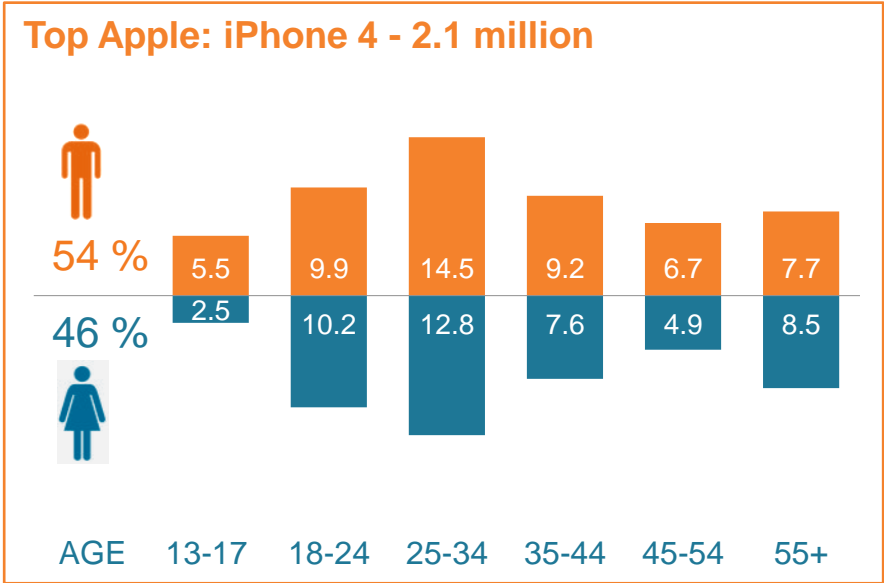
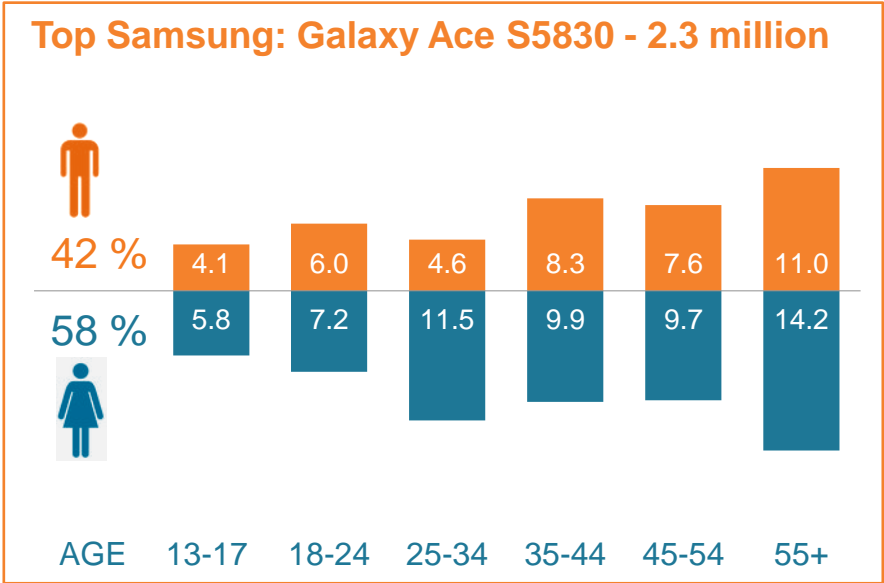


Watch Video - 8.1 million

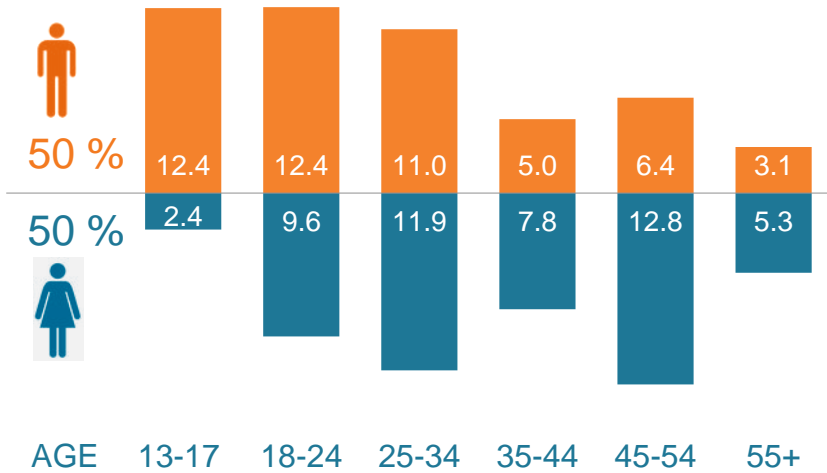




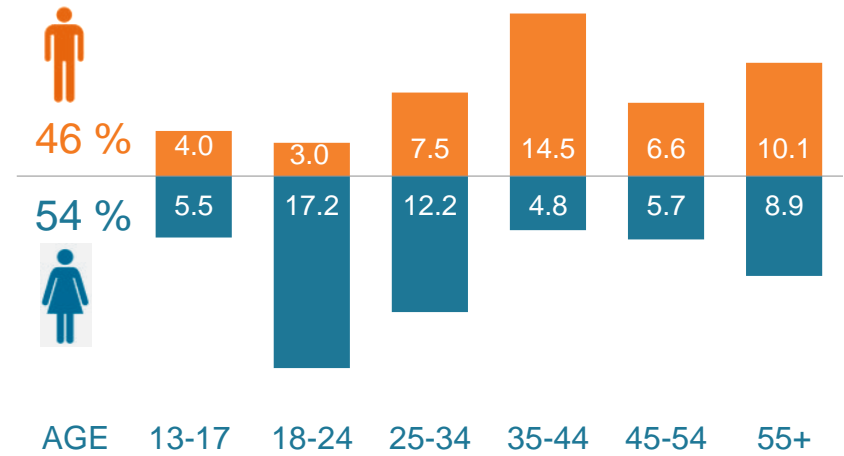




Top Sony: Xperia U - 0.3 million



Top HTC: One S - 0.1 million

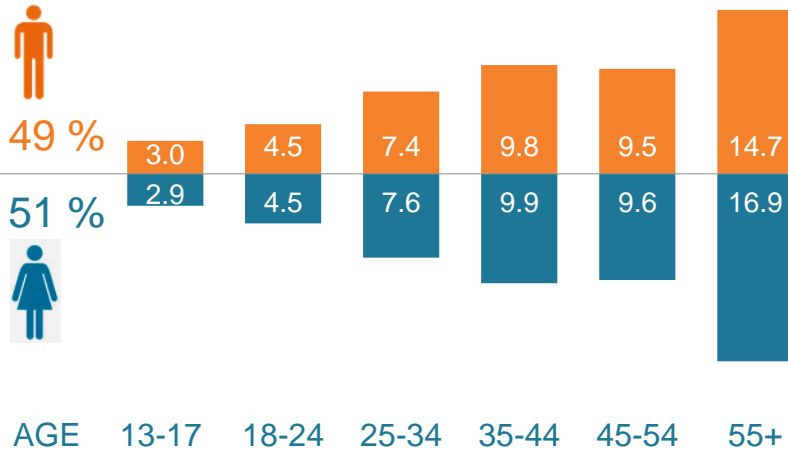




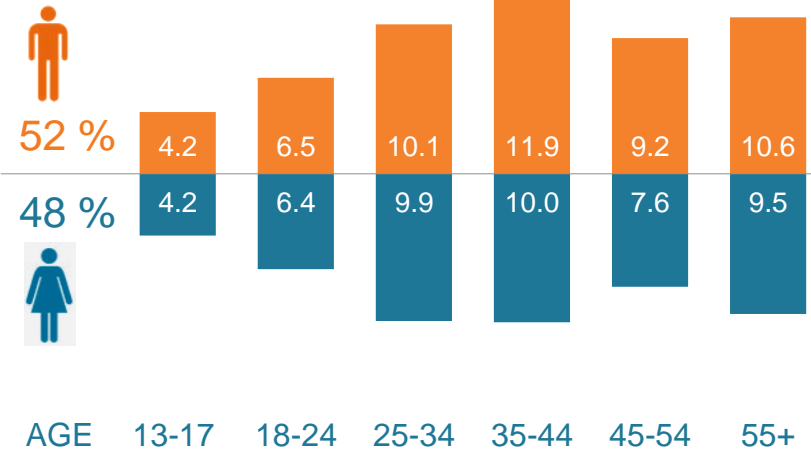
Italy



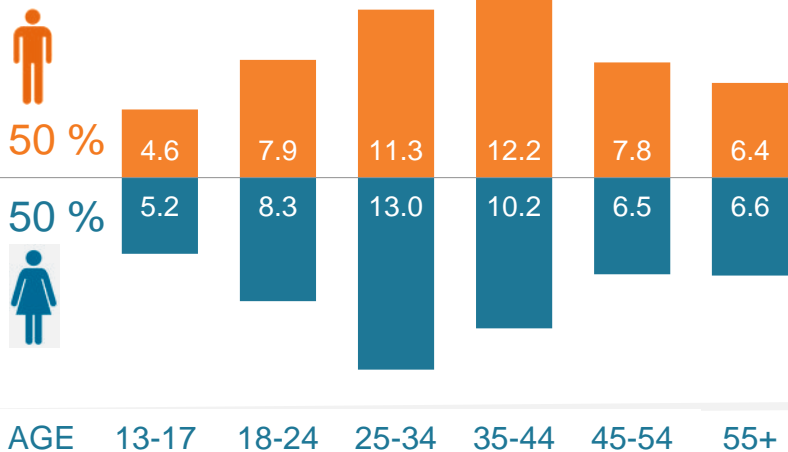
Total Mobile Audience - 48.0 million



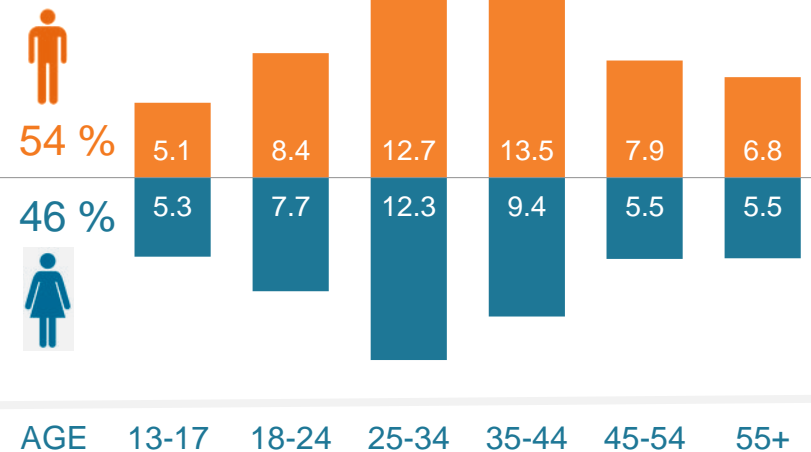
Connect to Internet - 28.8 million

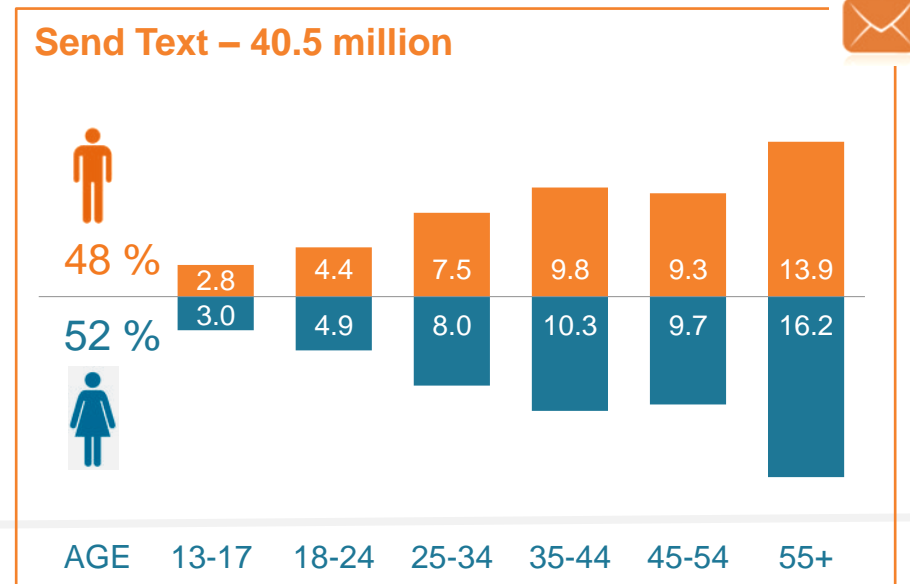
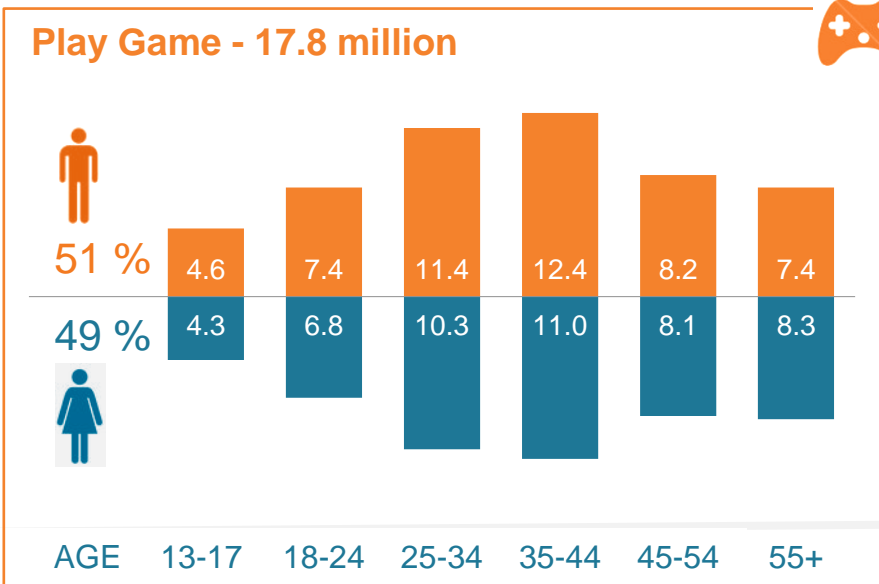
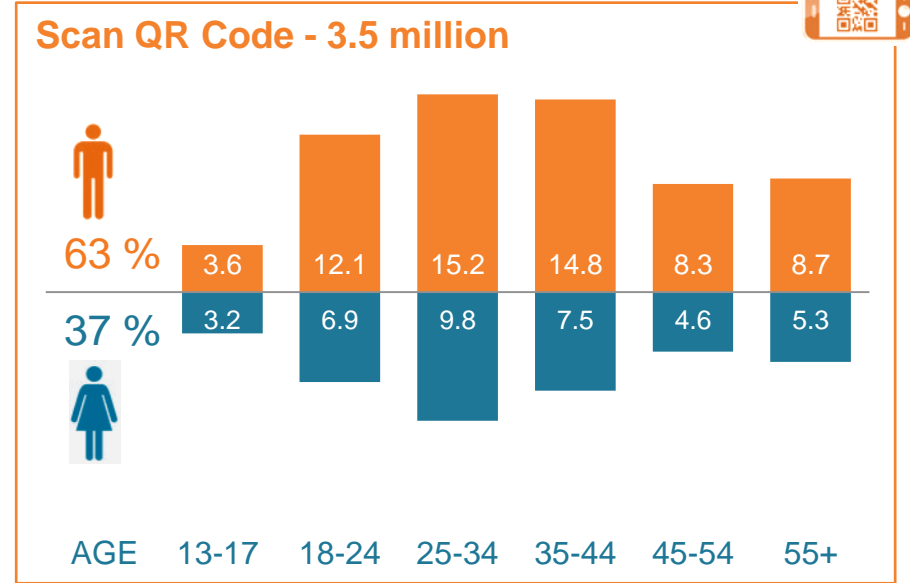
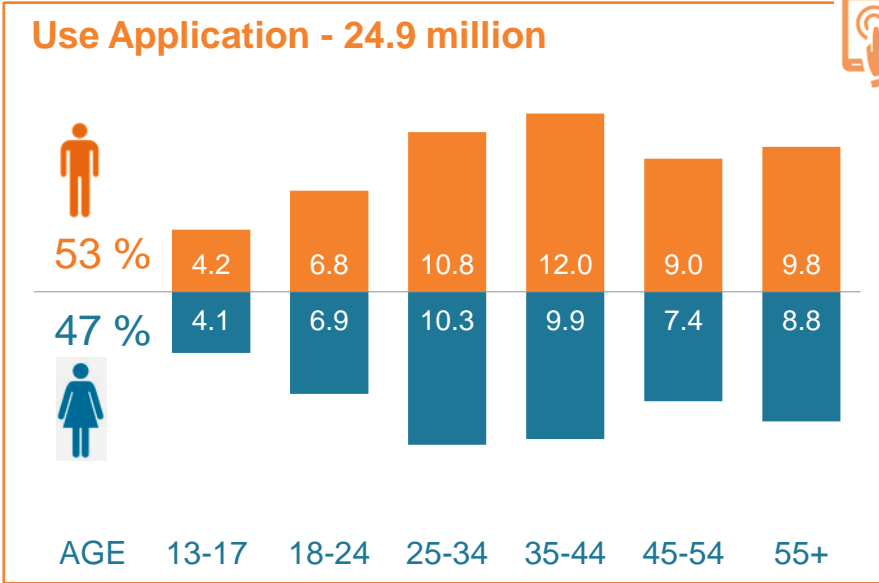


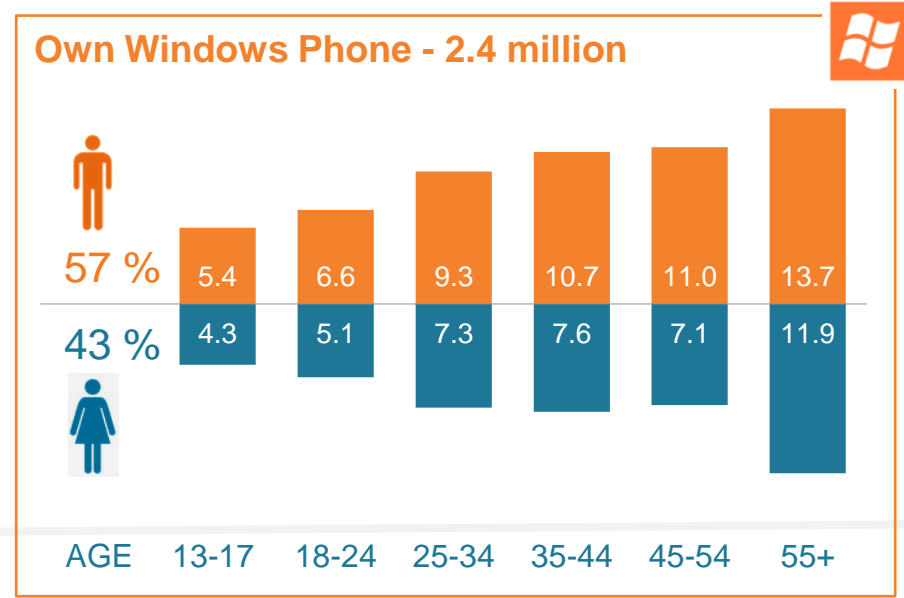
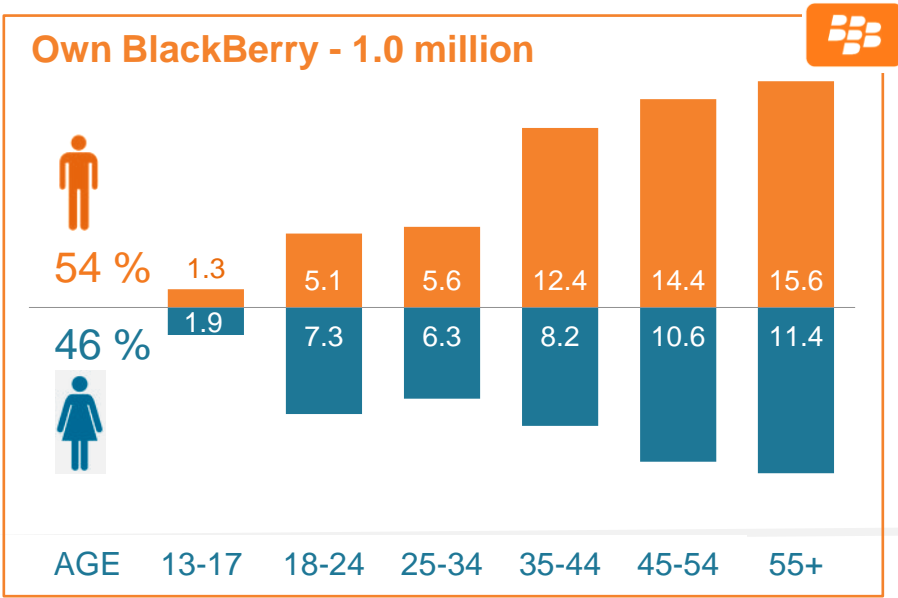
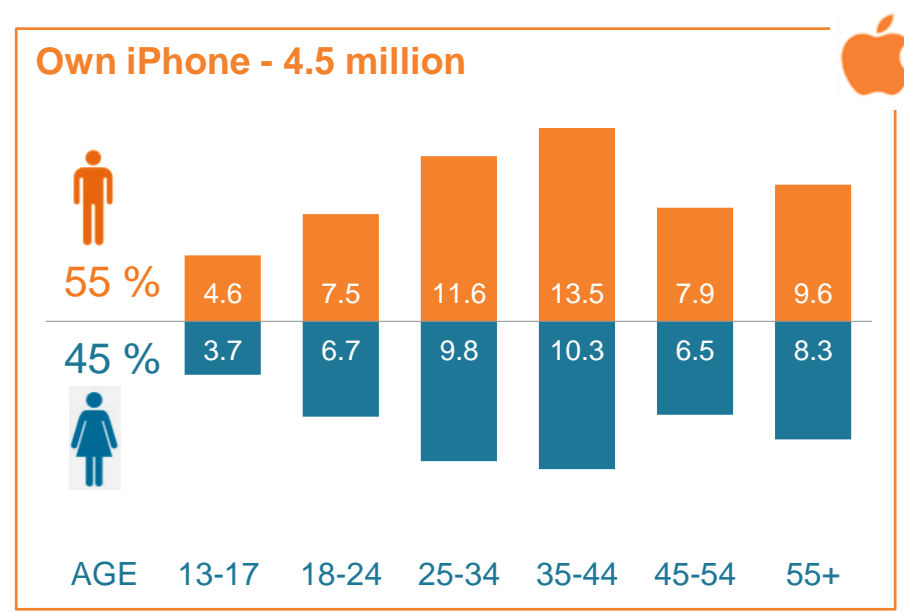
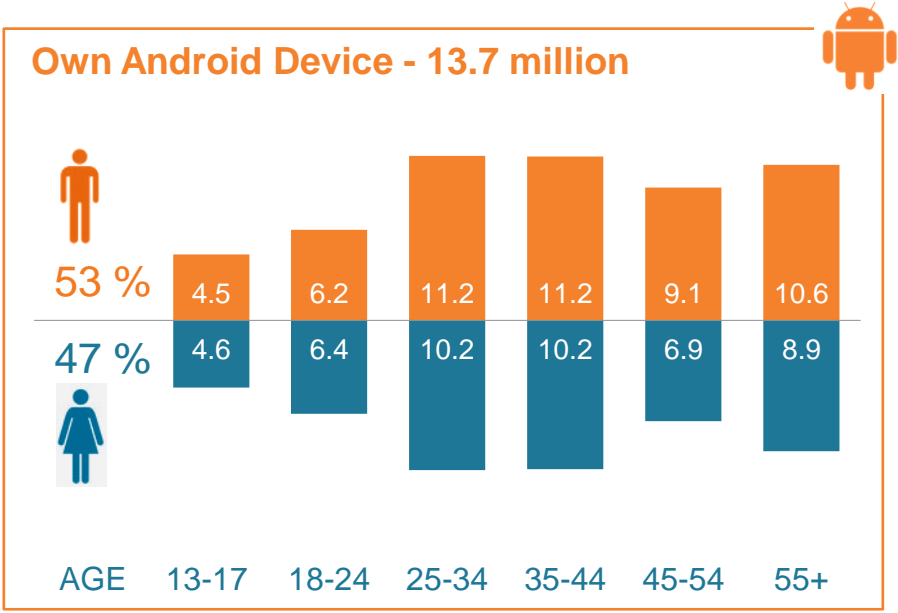
Use Social Media - 16.7 million

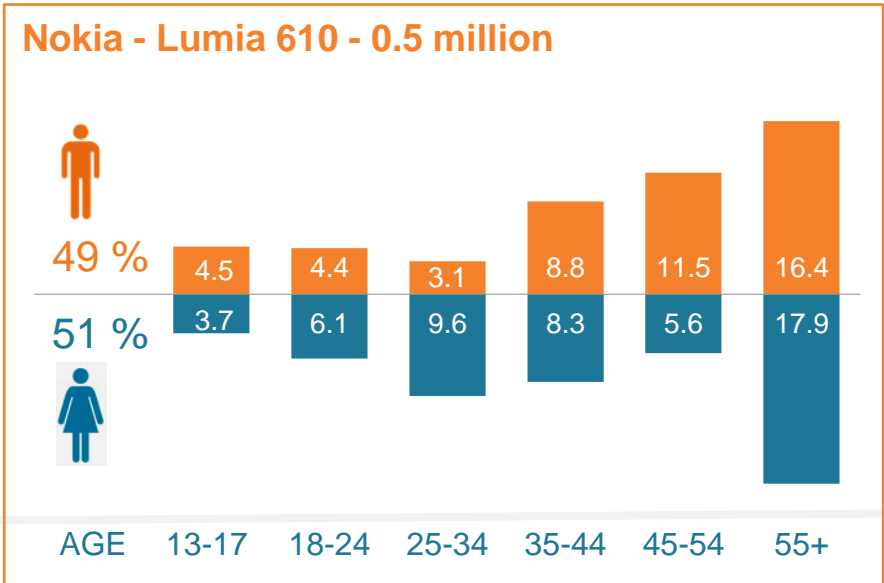
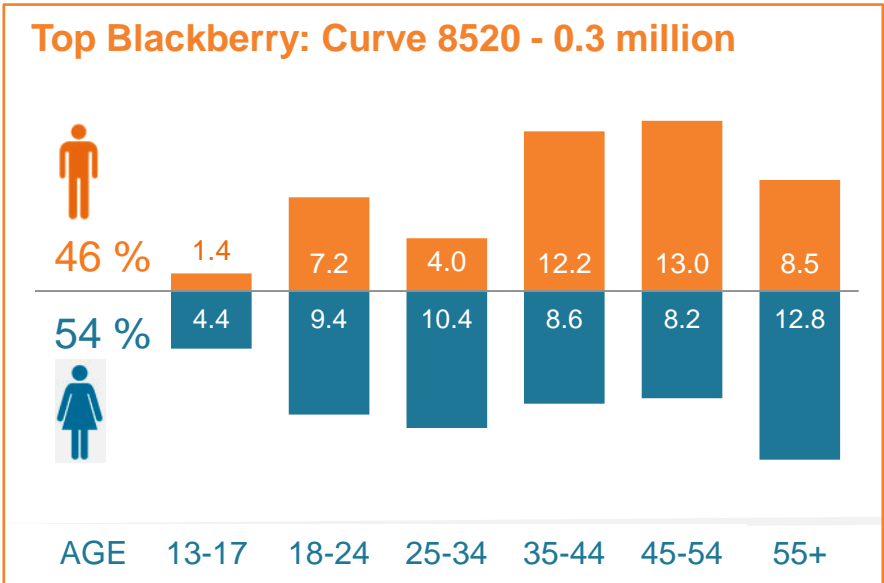
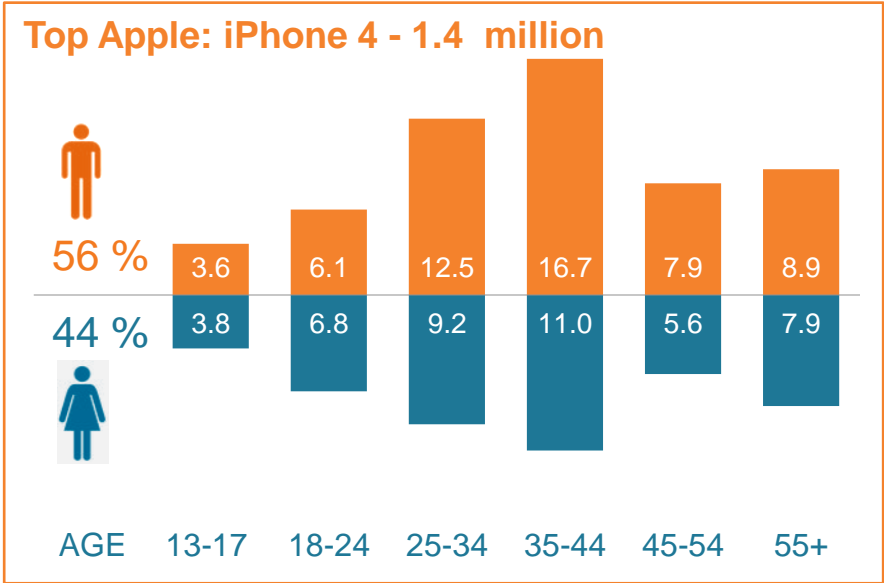
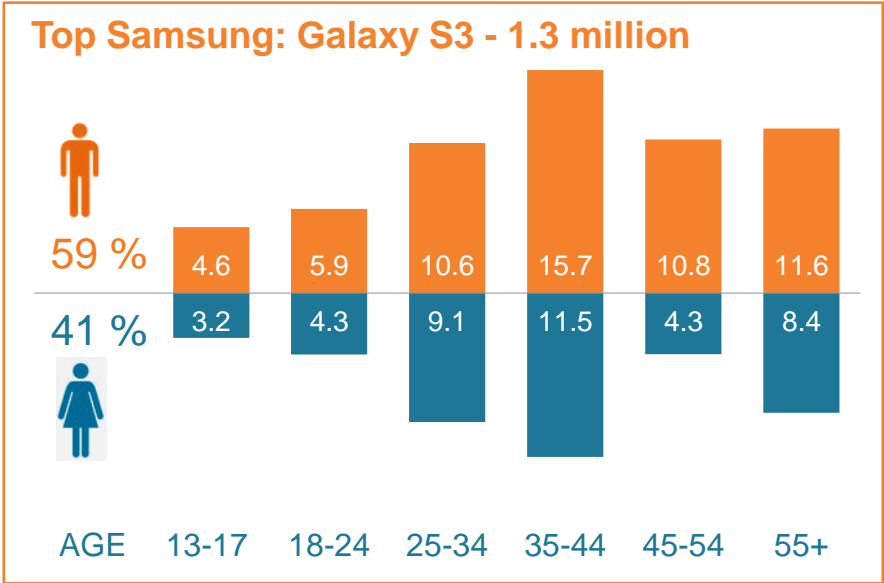


Watch Video - 11.6 million









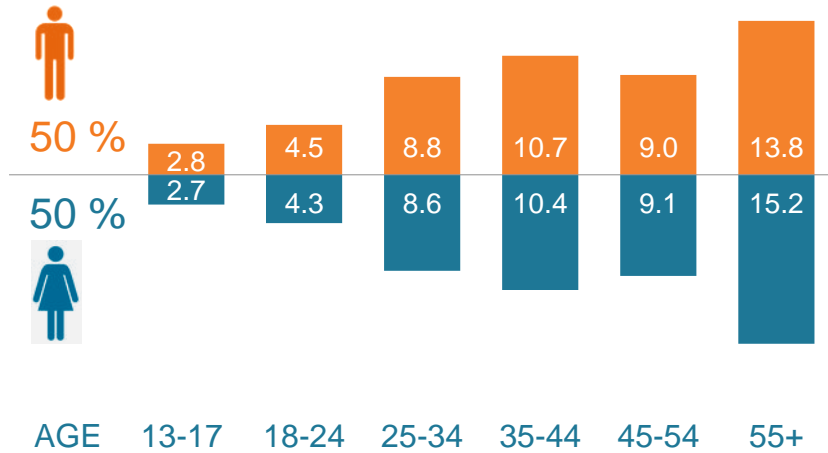


Spain

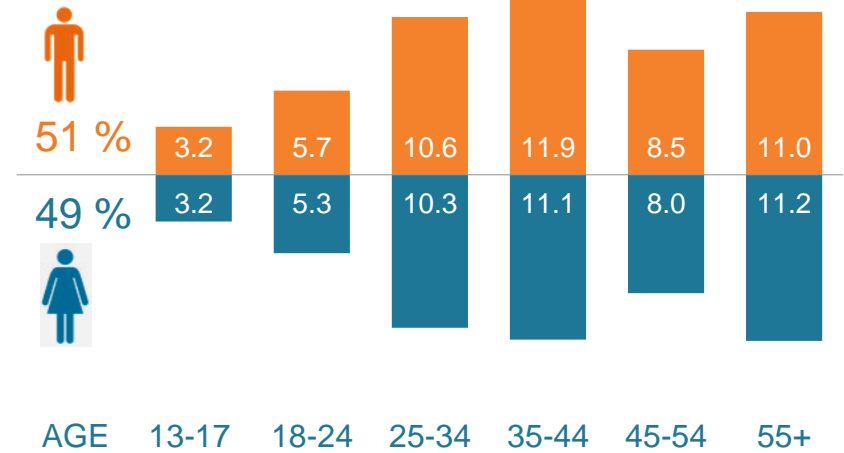




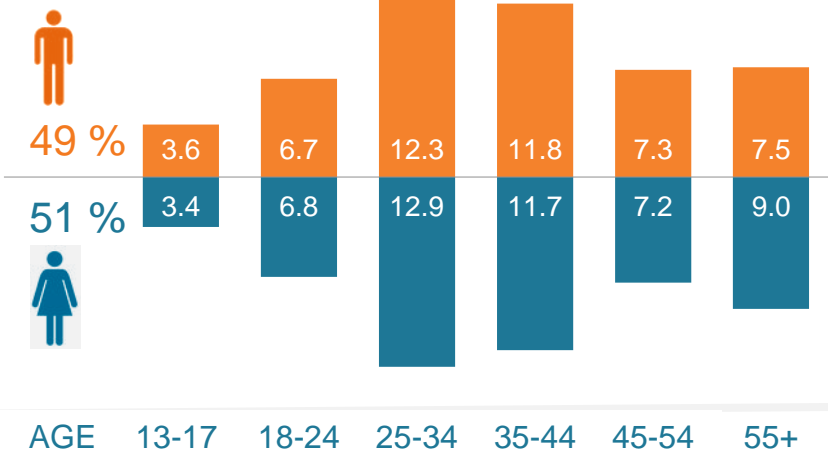
Total Mobile Audience - 36.0 million



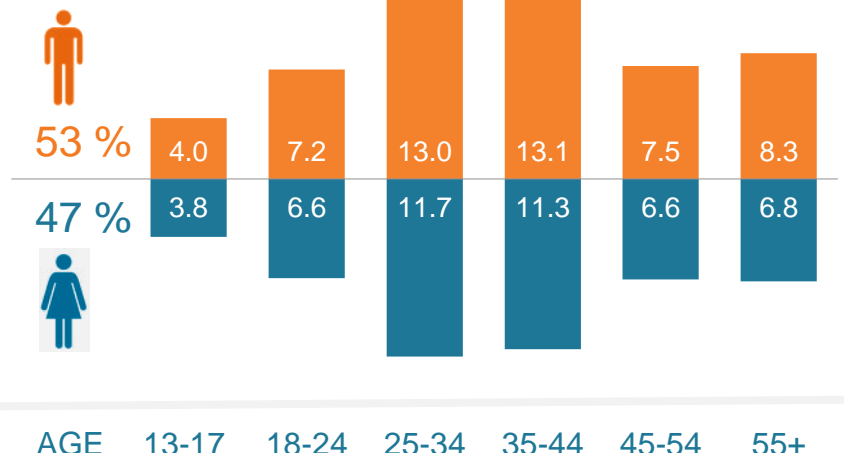
Connect to Internet - 26.6 million



Use Social Media - 16.9 million

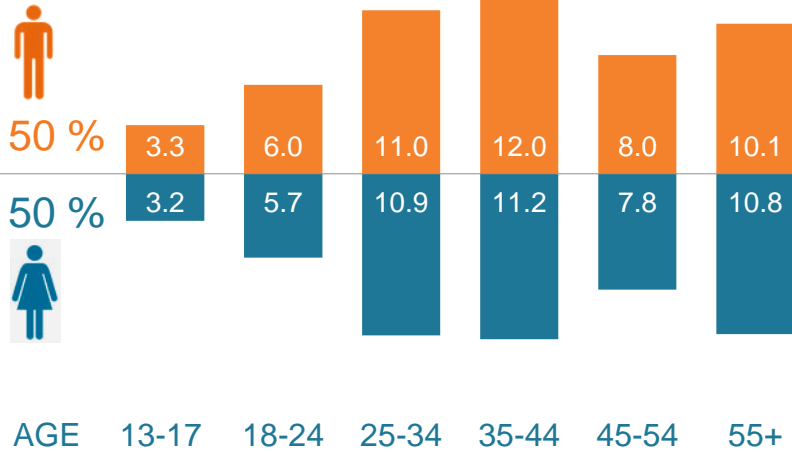


Watch Video - 11.2 million

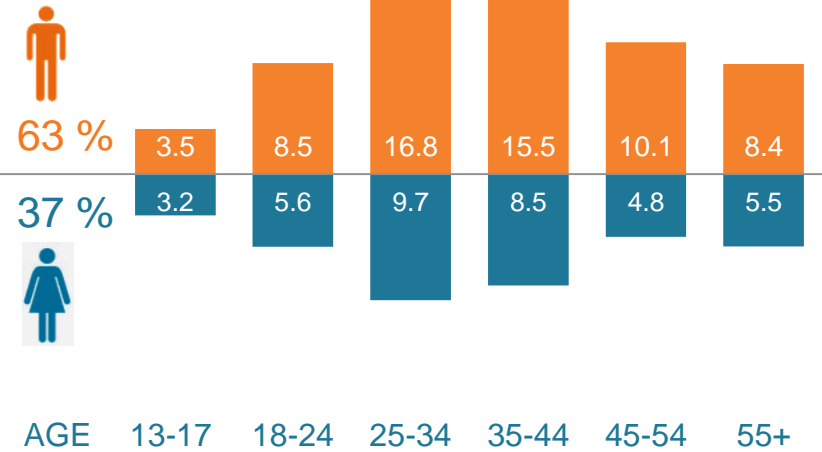




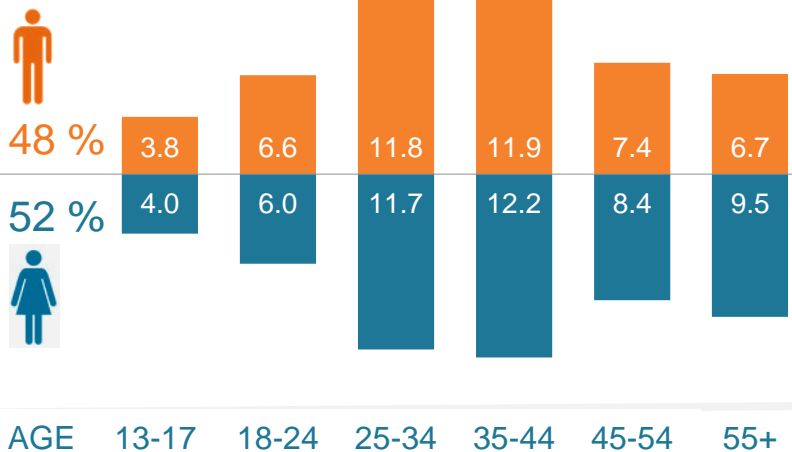
Use Application - 24 million



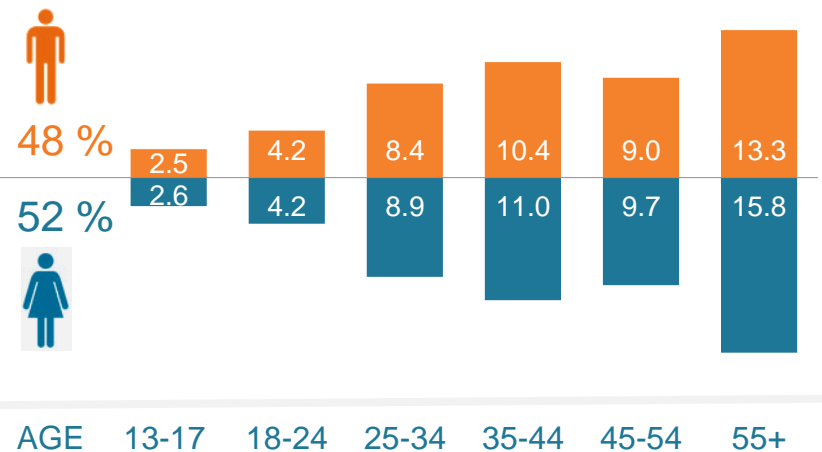
Scan QR Code - 3.9 million



Play Game - 13.5 million

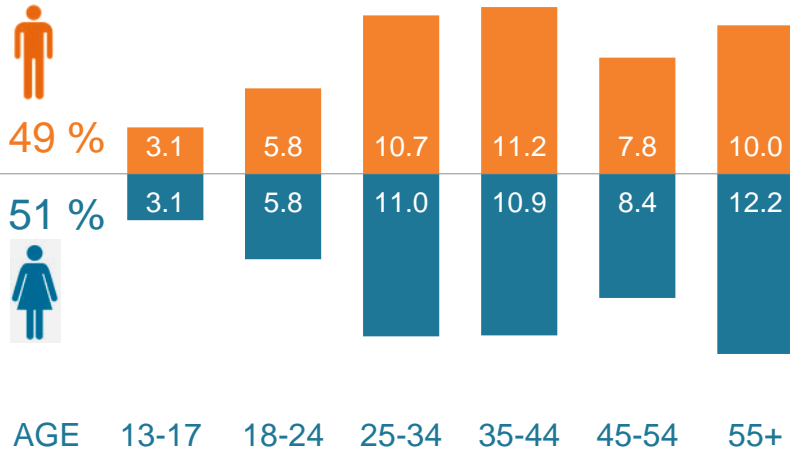


Send Text - 25.8 million

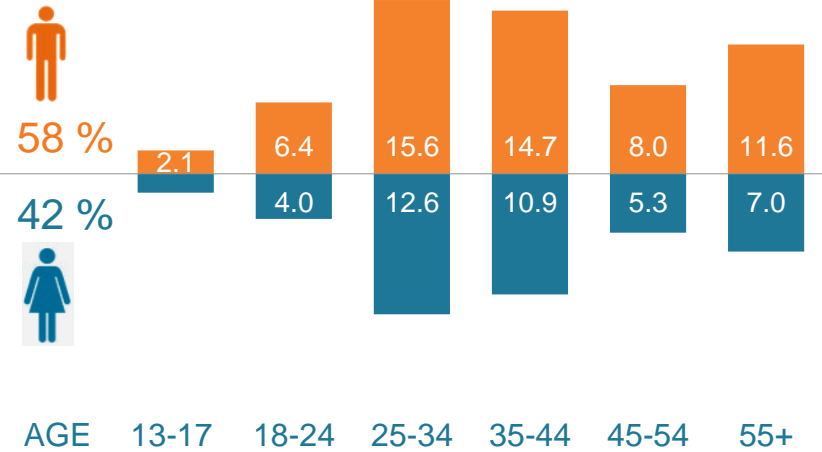




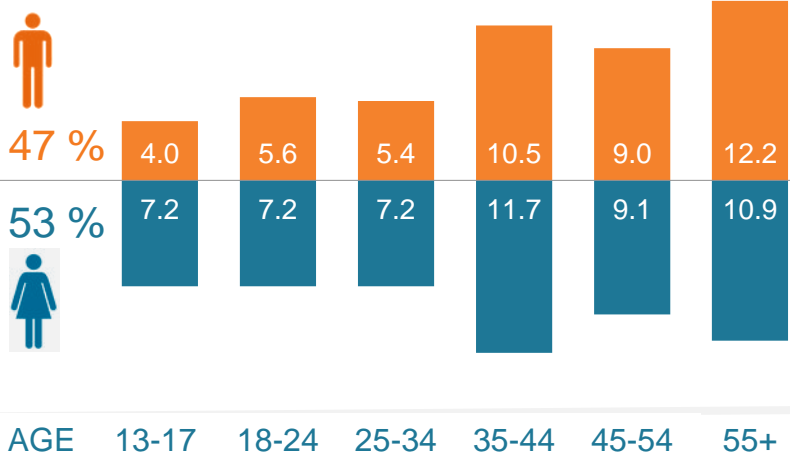
Own Android Device - 18.3 million



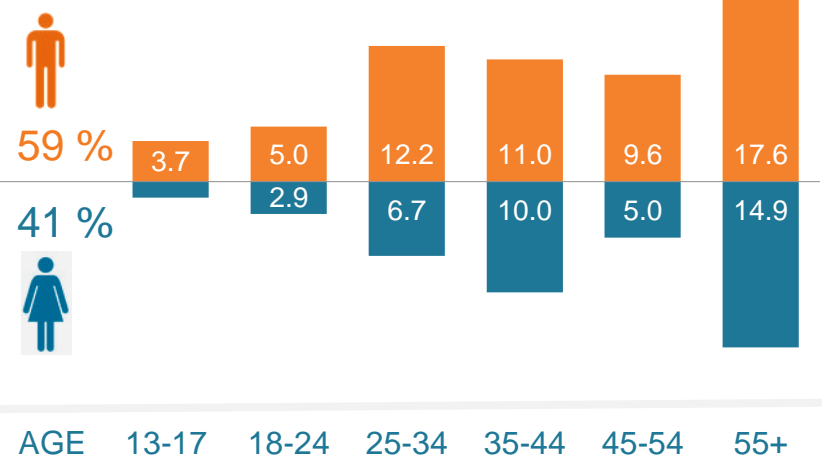
Own iPhone - 2.6 million



Own BlackBerry - 1.4 million

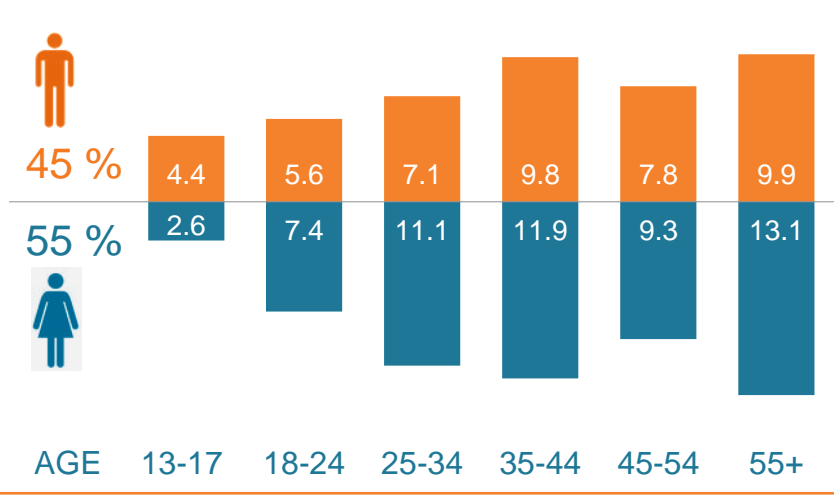


Own Windows Phone - 0.9 million

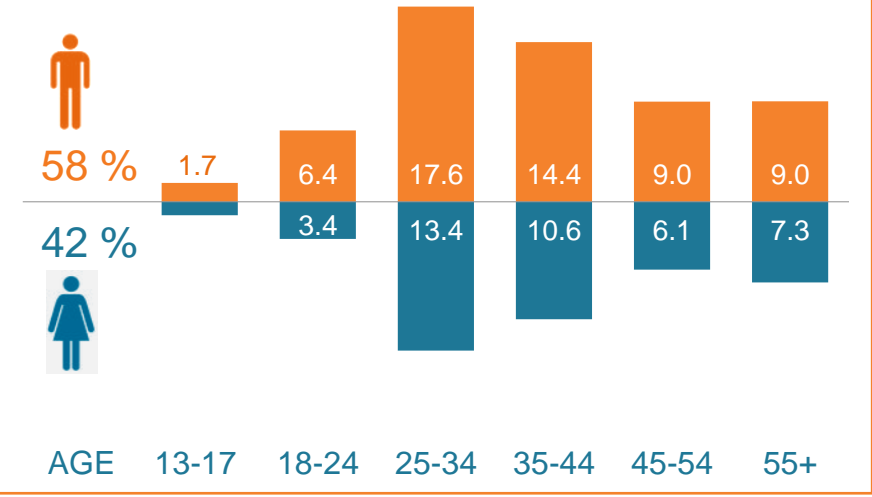




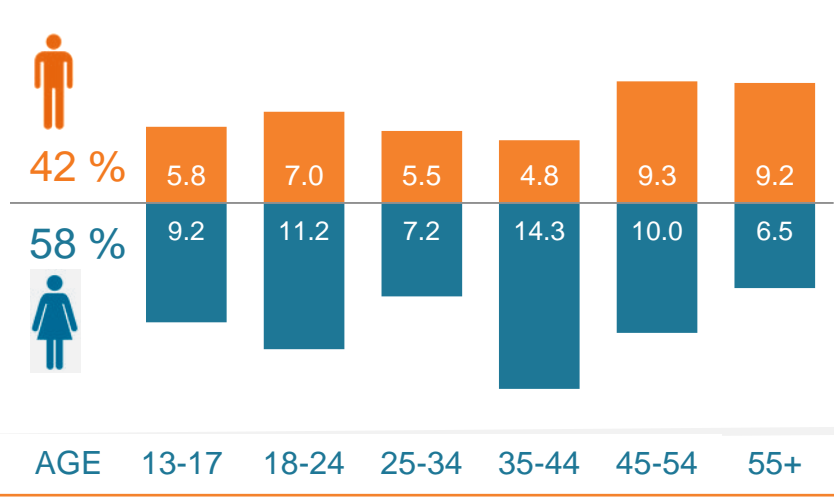
Top Samsung: Galaxy Ace S5830 - 2.0 million



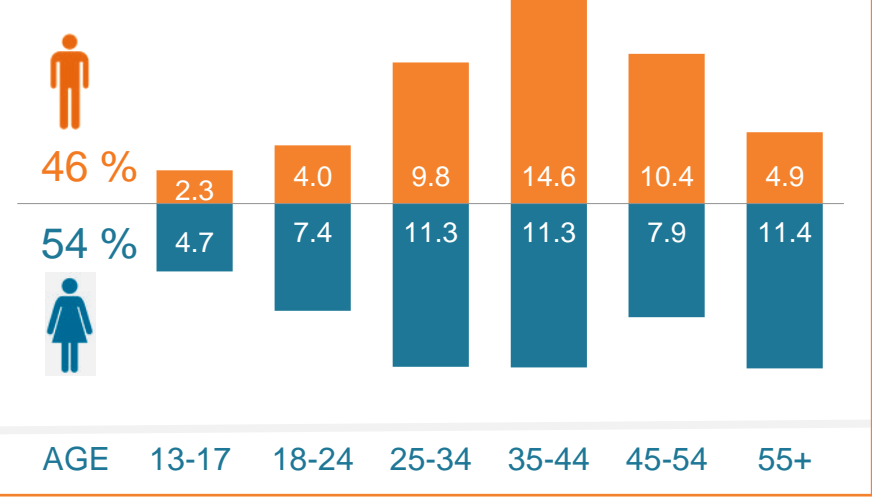
Top Apple: iPhone 4 – 1.0 million



Top Blackberry: Curve 8520 – 0.5 million

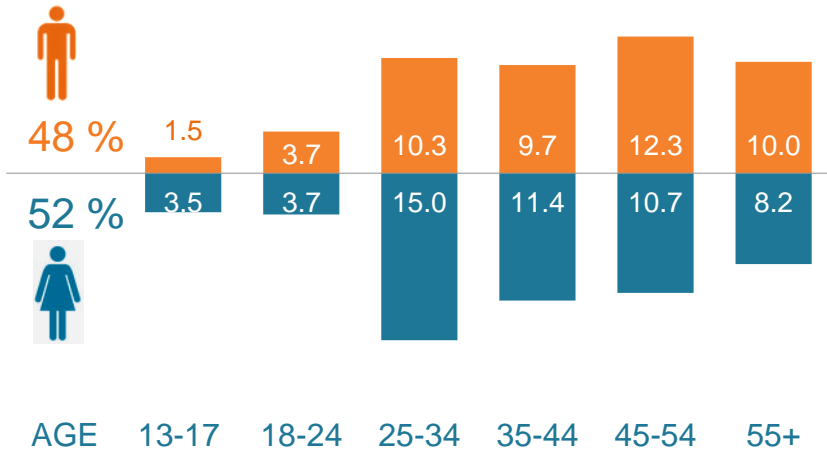


Top Sony: Xperia U – 0.6 million

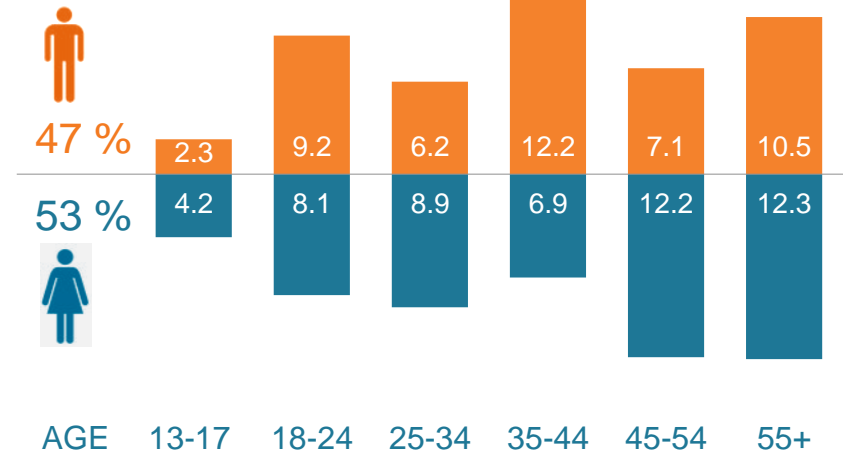




Top HTC: Wildfire S - 0.3 million



Top LG : Optimus L3 E610 - 0.5 million



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](https://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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