

# CONNECTED EUROPE







How smartphones and tablets are shifting  
media consumption



*Telefonica*

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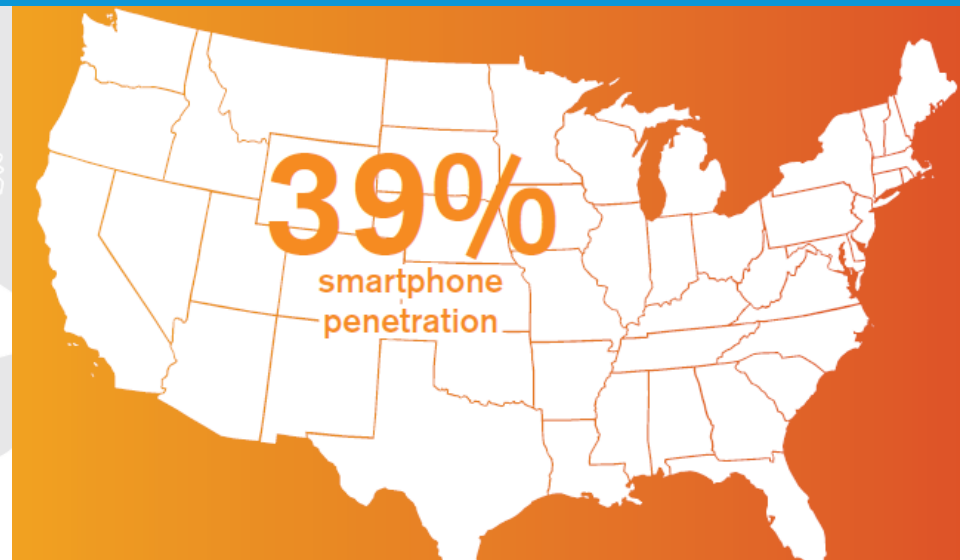
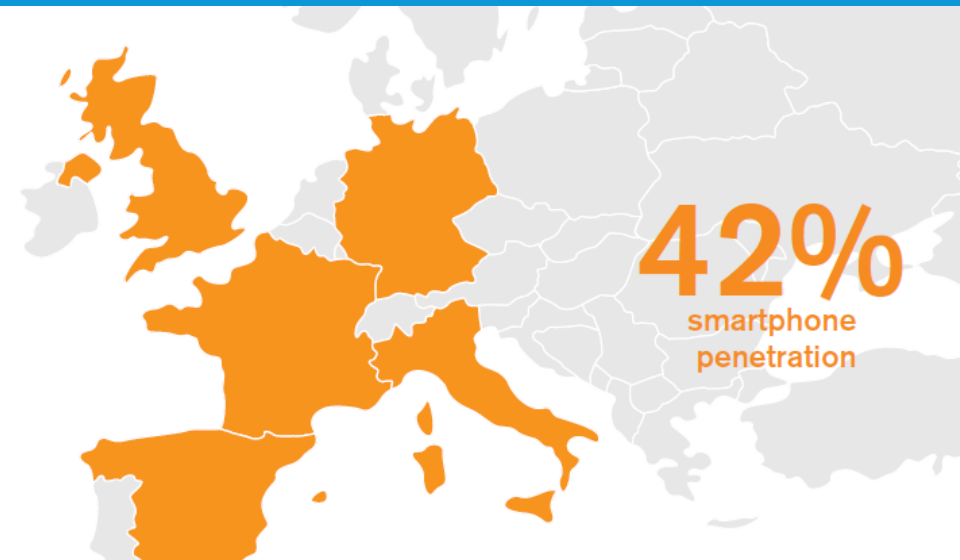
# Cross-platform consumption has created a vastly different landscape...

-  **The Rise of smartphones and tablets**
-  **Apple demonstrated leadership**
-  **Key Players in the fragmented mobile ecosystem**
-  **Mobile Media is booming**
-  **Connected device traffic is gaining share of overall traffic**
-  **Apple's halo continues to expand with the iPad**

...with mobile commerce taking off and reshaping expectations for the retail industry

# THE RISE OF SMARTPHONES

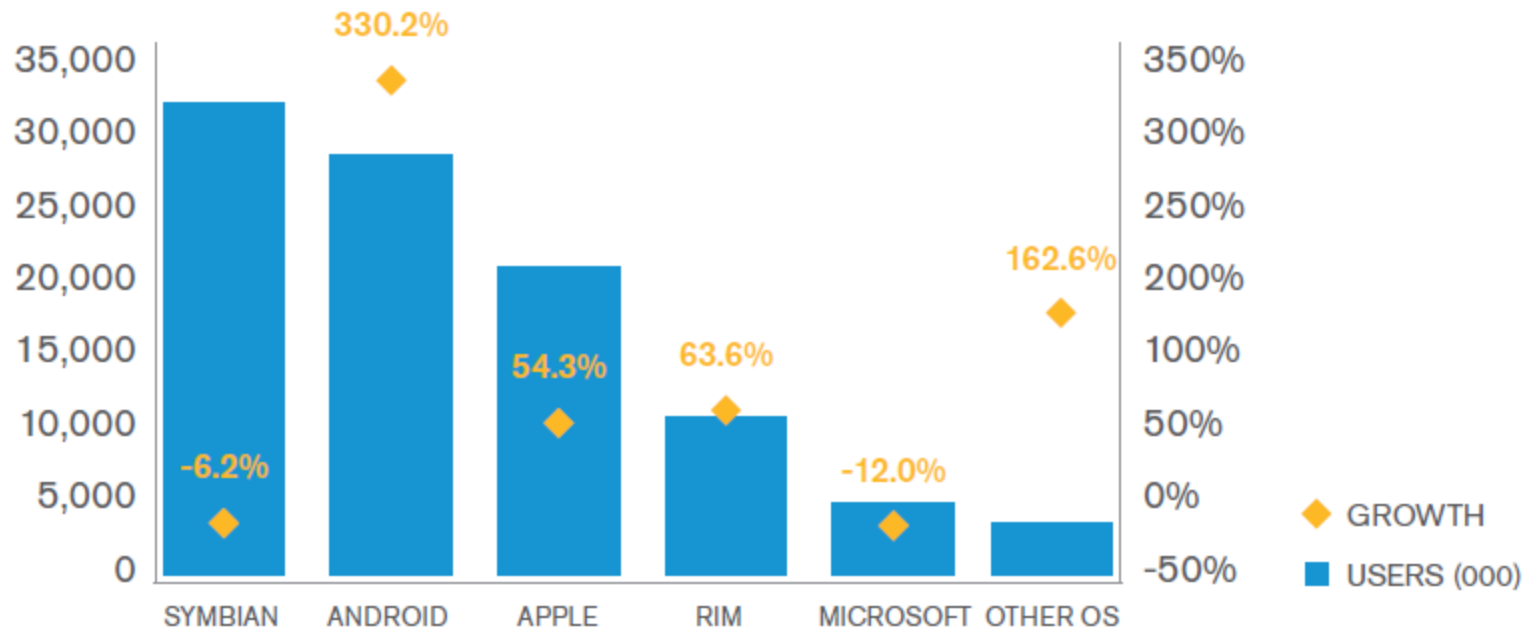
## EU5 LEADS THE US



# ANDROID GOES MAINSTREAM

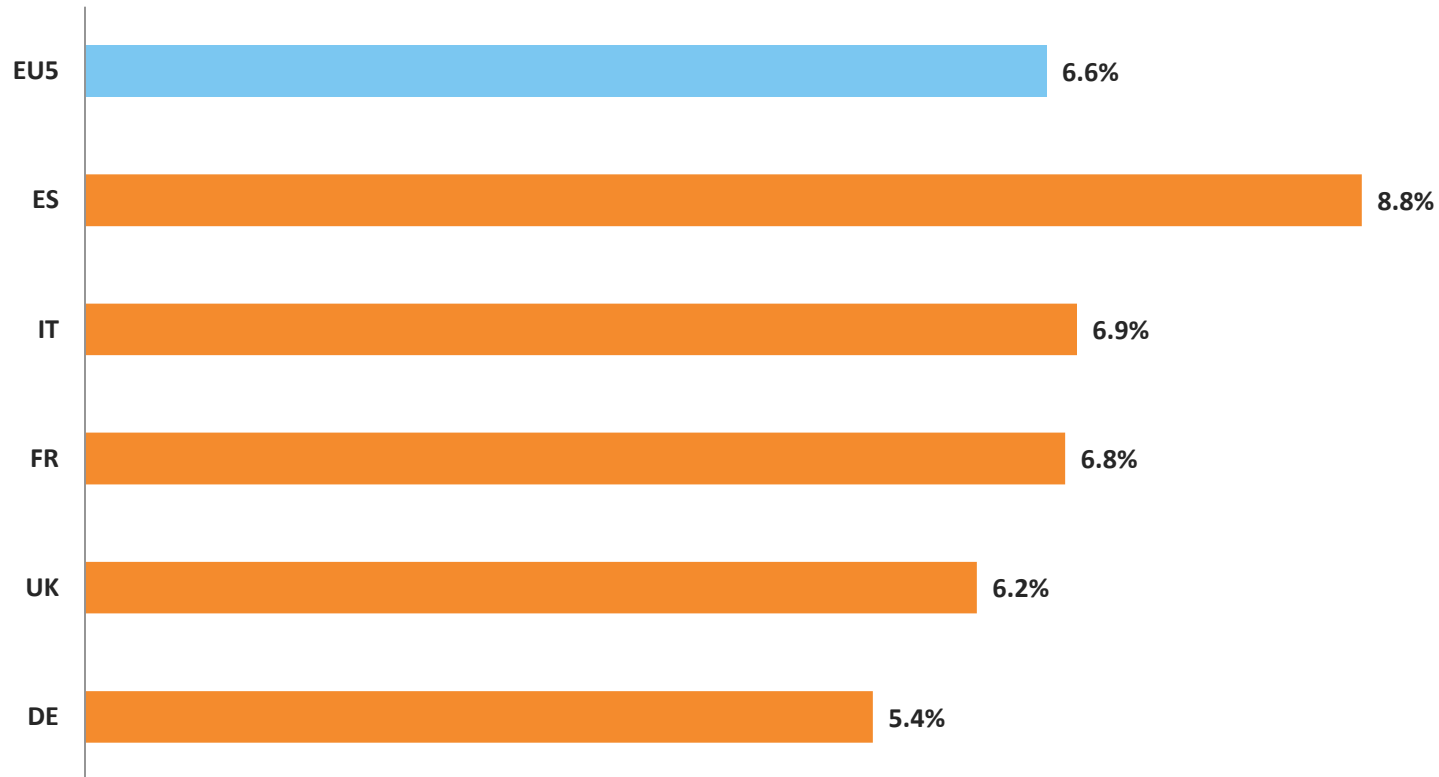
## Smartphone Operating Systems

Source: comScore MobiLens, EU5, 3 mon. avg. ending Oct 2011



# TABLETS NOT JUST FOR MOBILE USERS

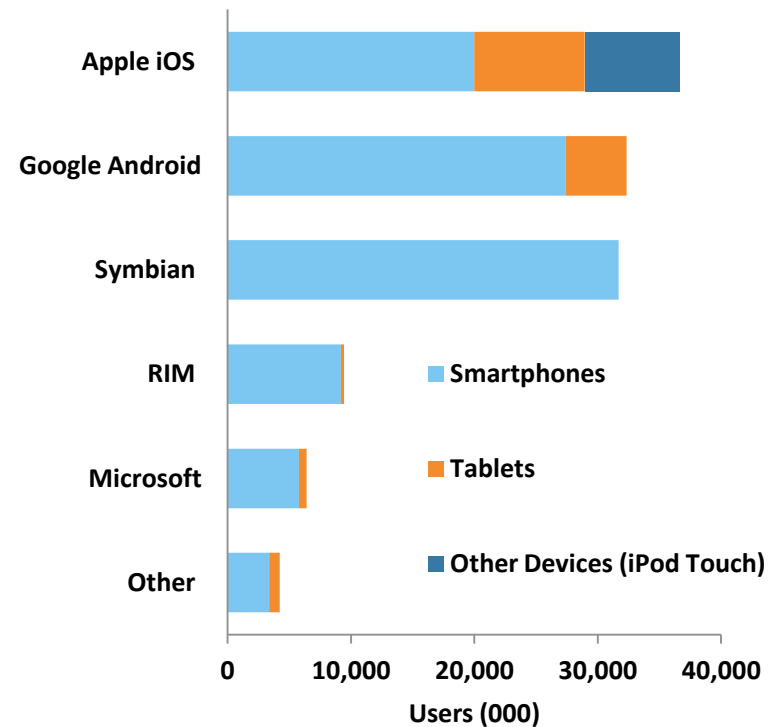
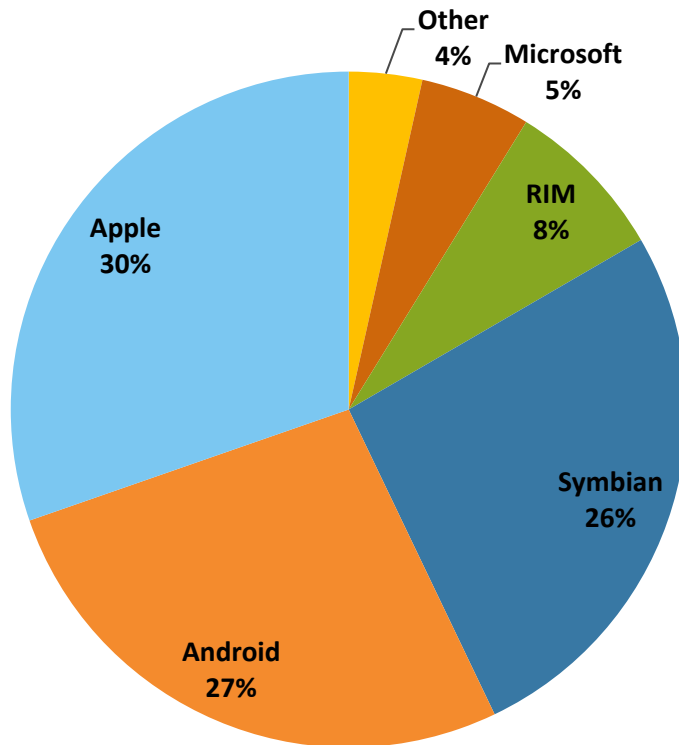
Percent of Mobile Owners That Also Own Tablet  
Source: comScore MobiLens, 3 mon. avg. ending Oct 2011



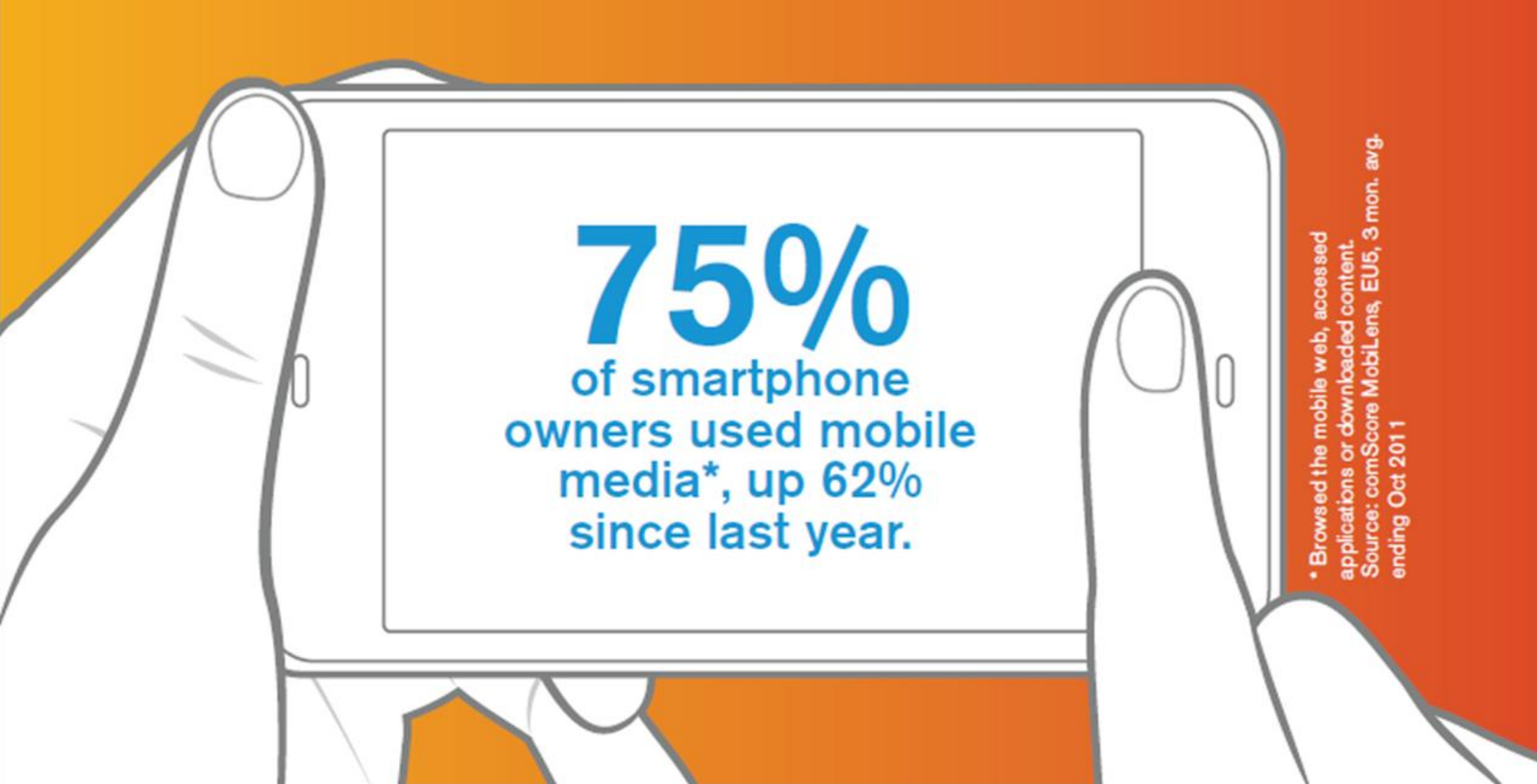
# APPLE ECOSYSTEM TAKES TOP SPOT FOR TOTAL DEVICES IN USE

OS Market Share Audience

Source: comScore MobiLens, EU5, 3 mon. avg. ending Oct 2011



# MOBILE MEDIA CONSUMPTION ON THE UP



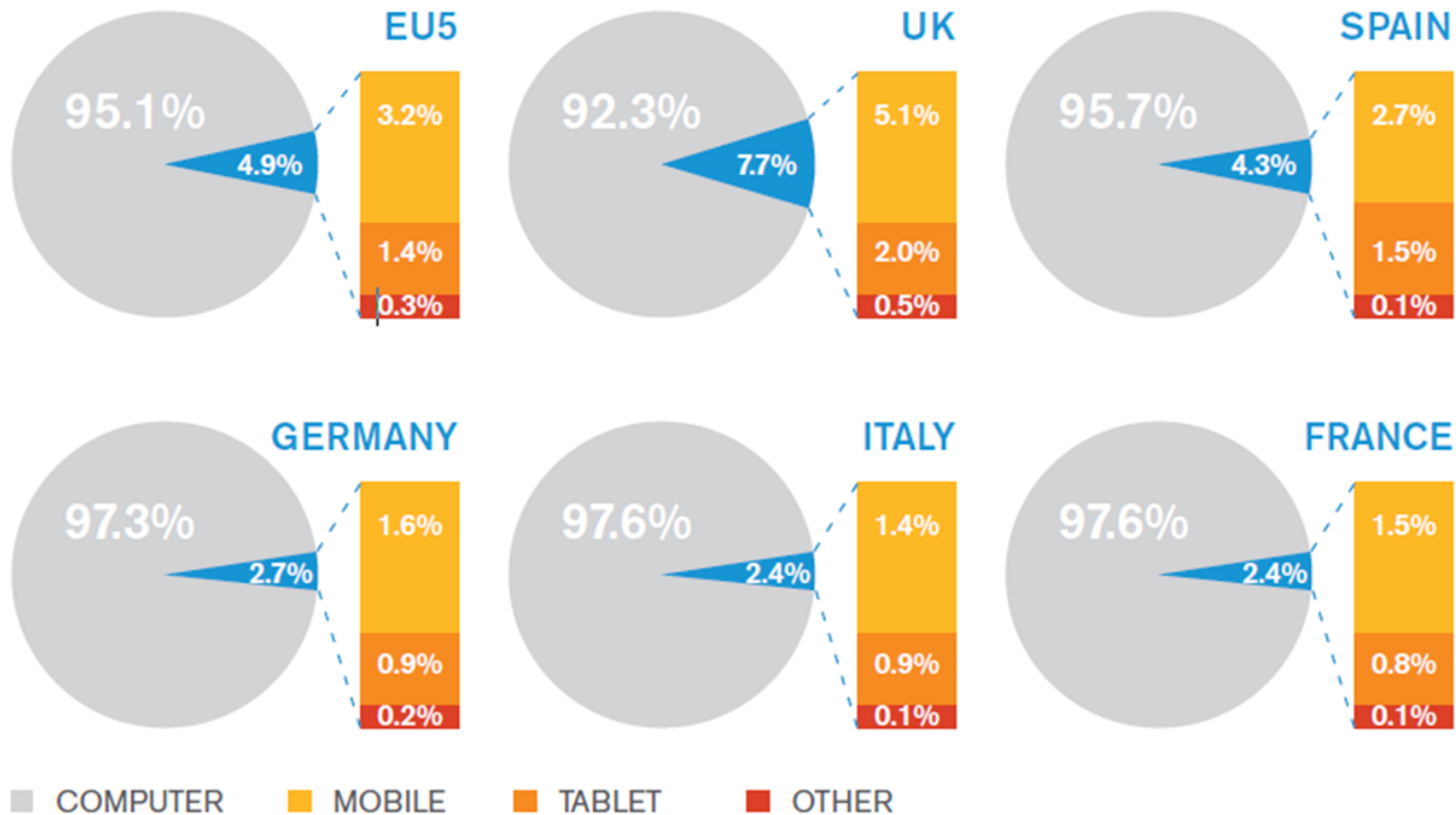
**75%**  
of smartphone  
owners used mobile  
media\*, up 62%  
since last year.

\* Browsed the mobile web, accessed applications or downloaded content.  
Source: comScore MobiLens, EU5, 3 mon. avg. ending Oct 2011

# MOBILE LEADS BUT TABLETS GAINING STEAM

## Share of Connected Device Traffic

Source: comScore Device Essentials, Oct 2011



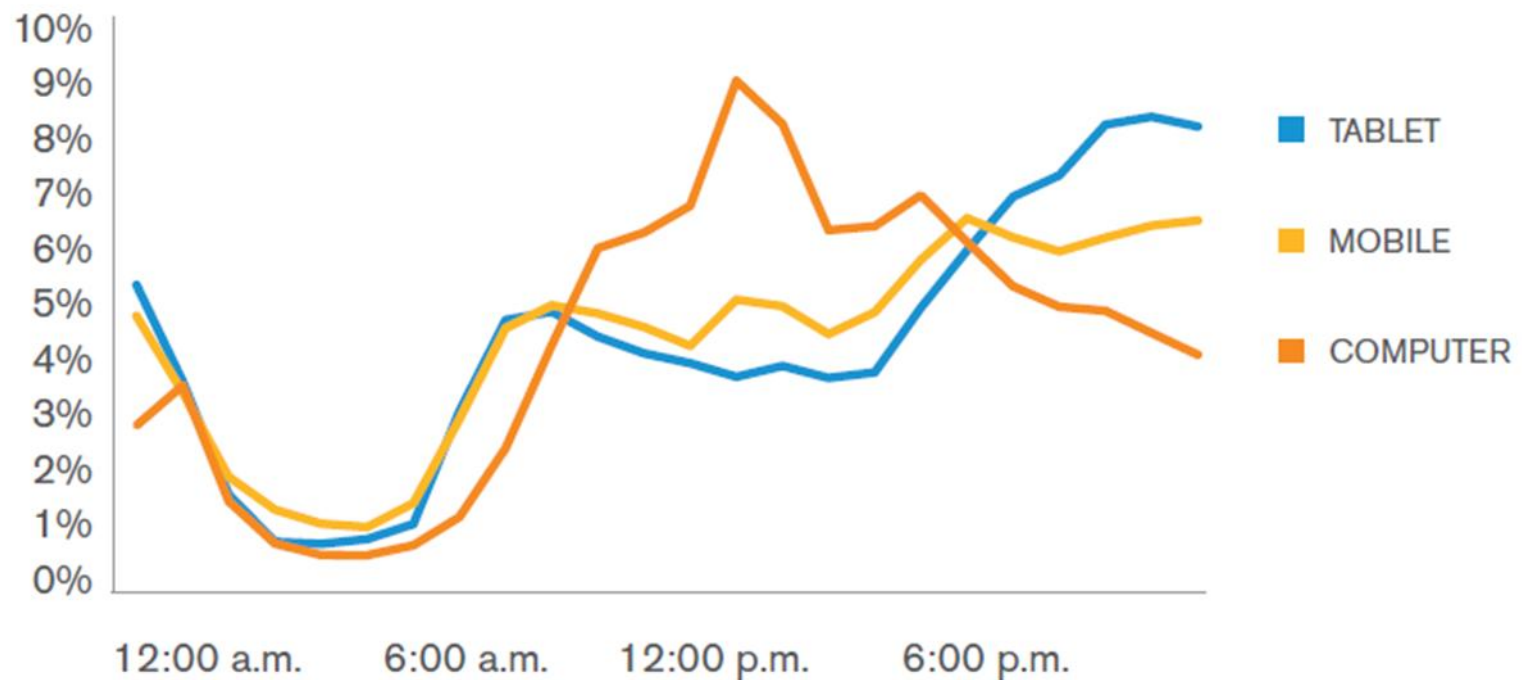
Connected devices are defined as tablets and other web-enabled devices, such as gaming consoles and media players.



# TABLET USAGE SPIKES AT NIGHT

## Share of Device Page Traffic Over a Day

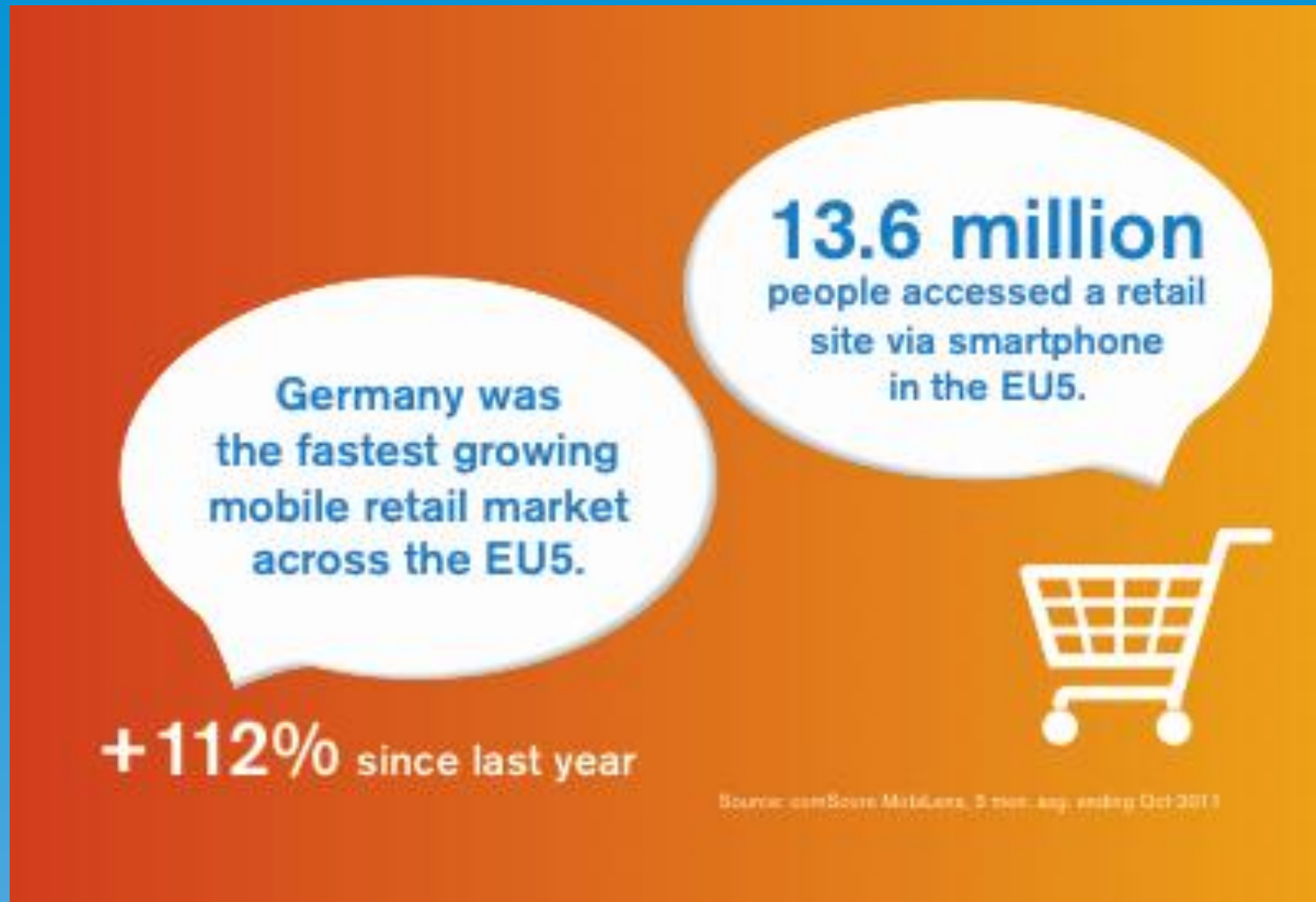
Source: comScore Custom Analytix, EU5, Wednesday 7 December 2011



# APPLE'S HALO CONTINUES TO SHINE WITH THE iPad



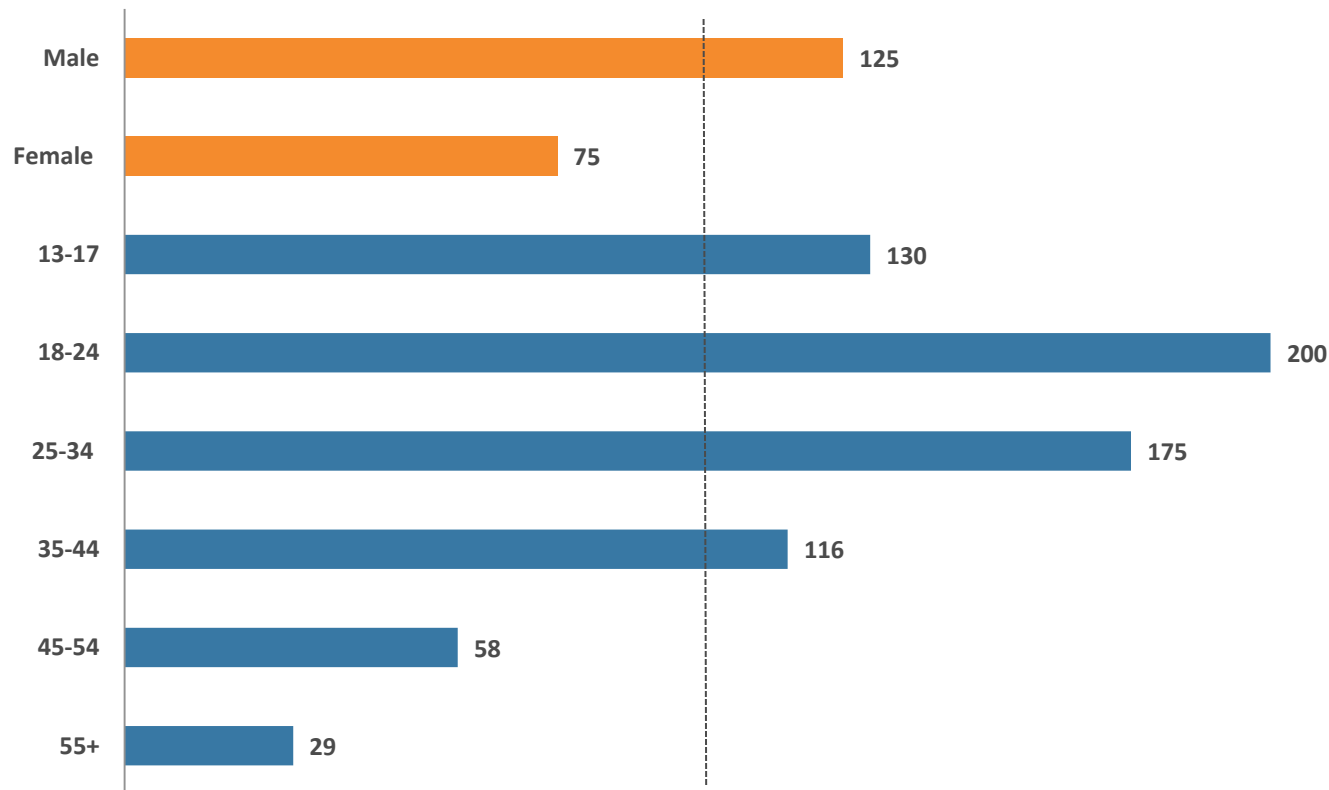
# MOBILE RETAIL USAGE IS ACCELERATING



# YOUNG MALES DRIVING MOBILE RETAIL

## Demographic Profile of Mobile Retail Users by Index

Source: comScore MobiLens, EU5, 3 mon. avg. ending Oct 2011

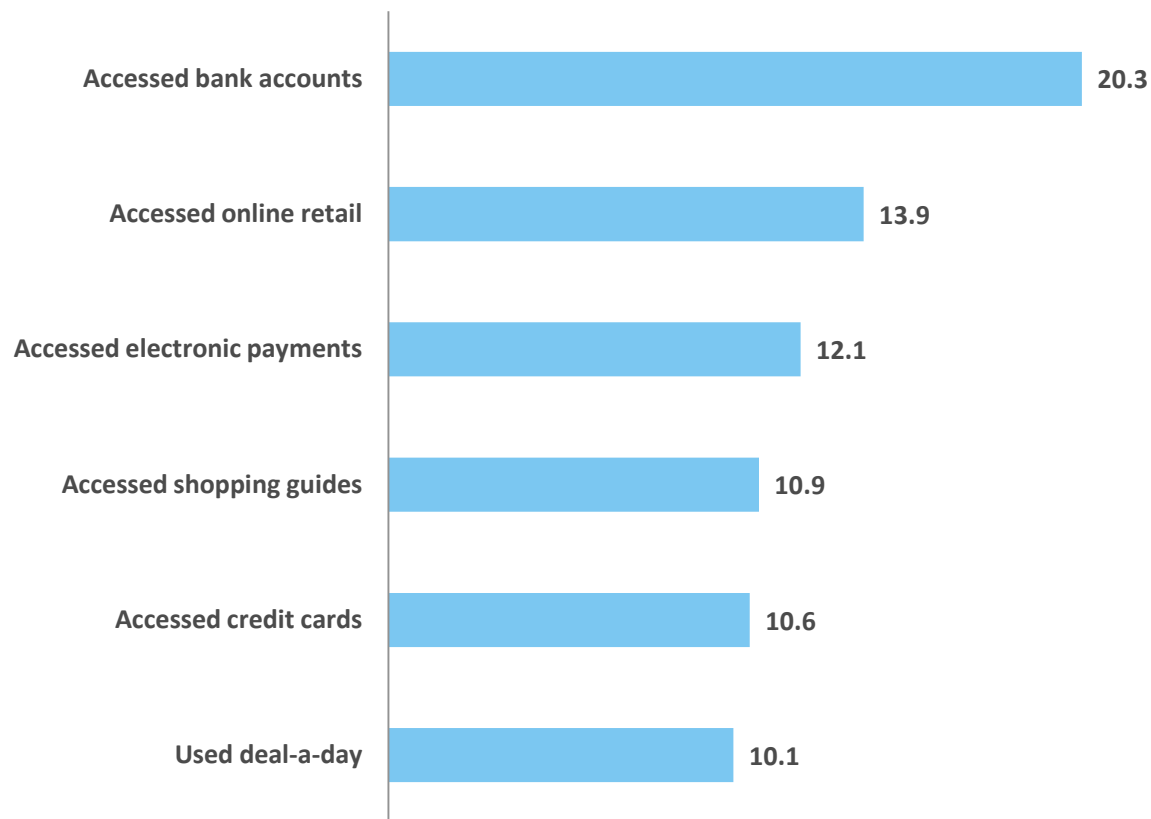


*Index of 100 indicates average representation*

# SMARTPHONES OPEN UP A WHOLE NEW WORLD FOR CONSUMERS...

## E-commerce and Related Services Accessed by % of Smartphone Users

Source: comScore MobiLens, EU5, 3 mon. avg. ending Oct 2011



# ... AND BECOMES AN IN-STORE SHOPPING TOOL

## Top Activities Performed in a Retail Store by % of Smartphone Users

Source: comScore MobiLens, EU5, 3 mon. avg. ending Oct 2011



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