

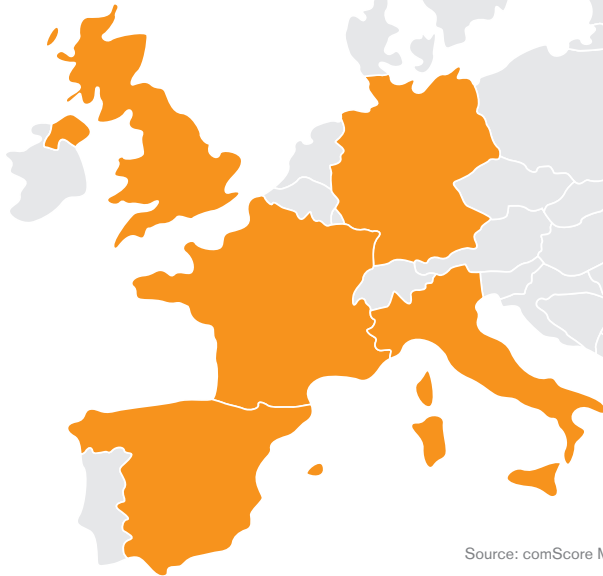


CONNECTED EUROPE

*How smartphones and tablets are shifting
media consumption*

Exclusively presented at **DLD**[★]
January 2012

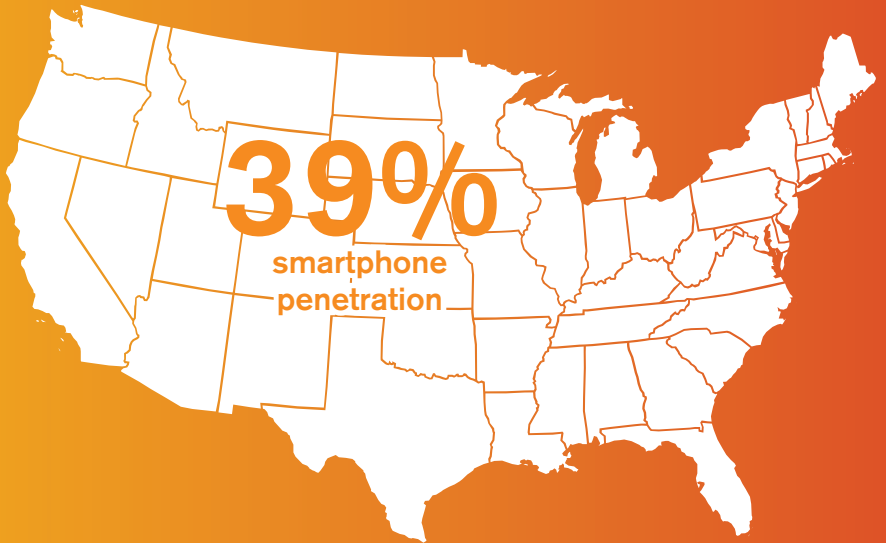
THE RISE OF SMARTPHONES



42%
smartphone
penetration

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

EU5 CONTINUES TO LEAD THE US

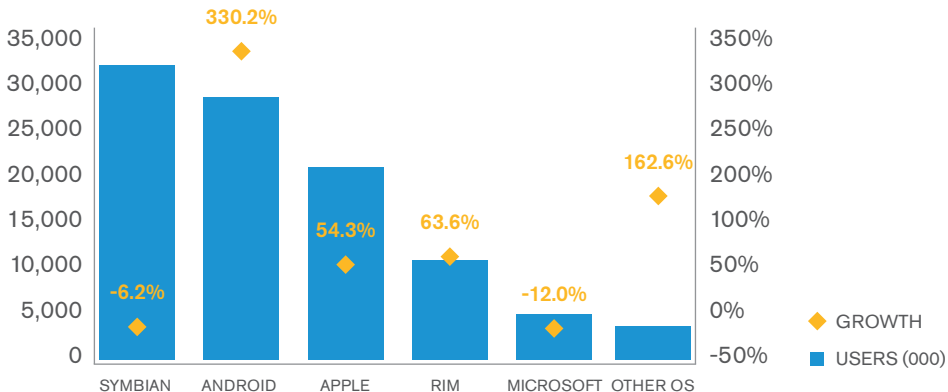


Source: comScore MobiLens, US, 3 mon. avg. ending Oct 2011

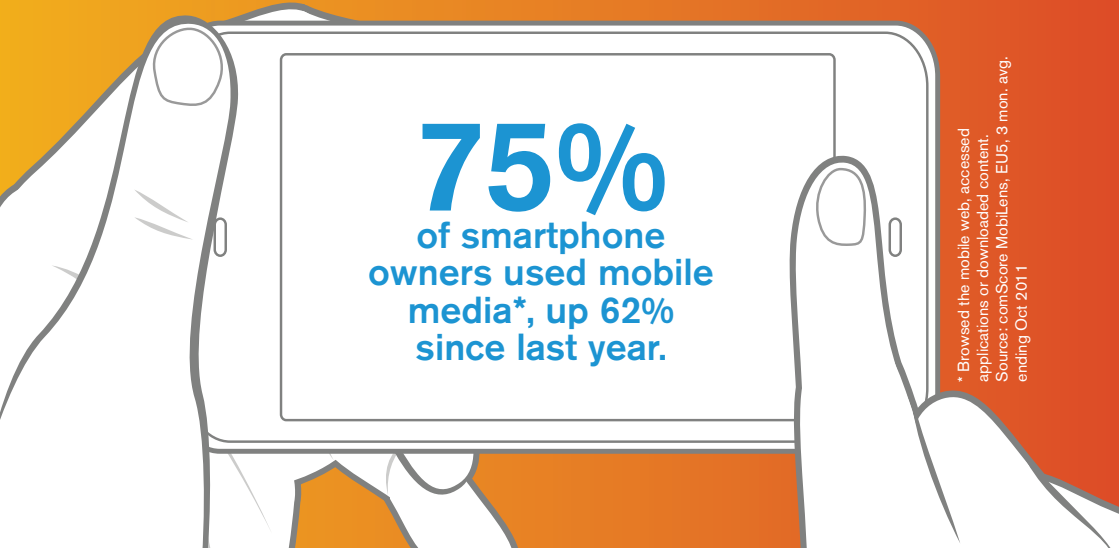
ANDROID GOES MAINSTREAM

Smartphone Operating Systems

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



MOBILE MEDIA CONSUMPTION ON THE UP

A stylized illustration of a hand holding a white smartphone. The phone's screen displays a statistic in blue text. The background is a gradient of orange and red.

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

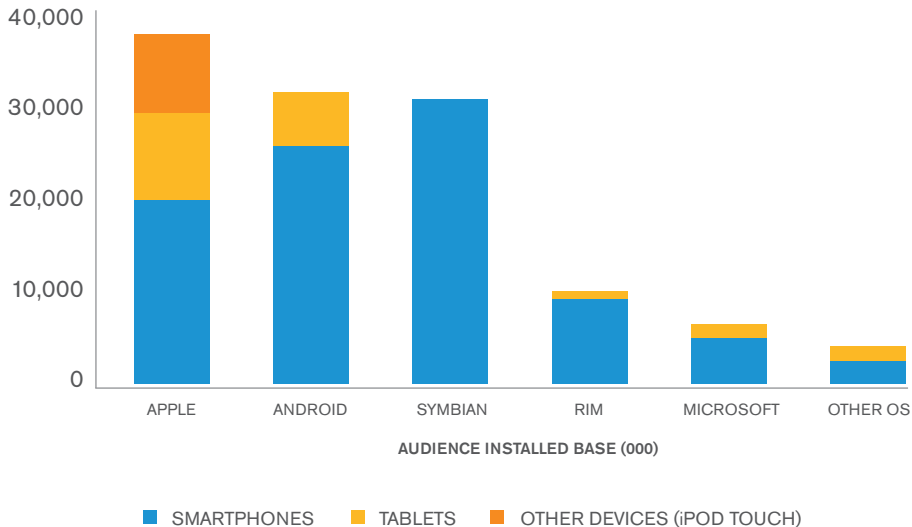
* Browsed the mobile web, accessed applications or downloaded content.
Source: comScore MobileLens, EU5, 3 mon. avg. ending Oct 2011



**Symbian & Android lead
the smartphone market, but
the Apple ecosystem takes the
top spot for total devices in use.**

OS Market Share Audience Installed Base

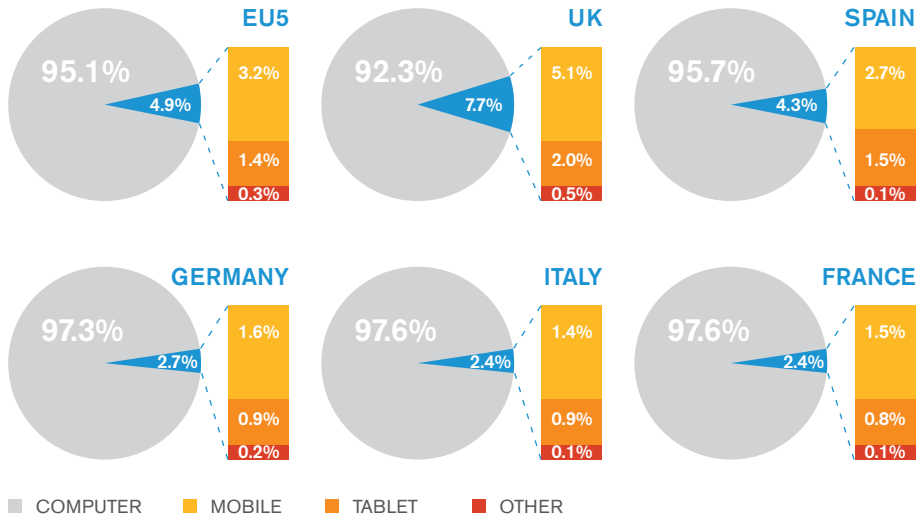
Source: comScore MobiLens, EU5, 3 mon. avg. ending Oct 2011



**Smartphones drive
non-computer web traffic,
but tablets are gaining steam.**

Share of Connected Device Traffic

Source: comScore Device Essentials, Oct 2011

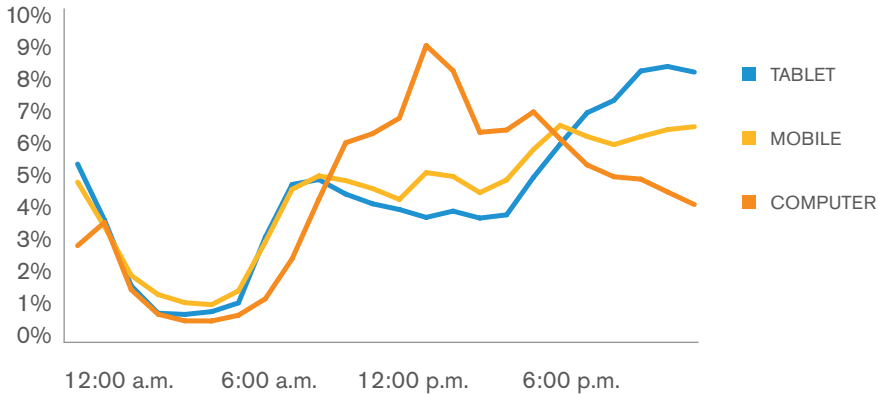


Connected devices are defined as tablets and other web-enabled devices, such as gaming consoles and media players.

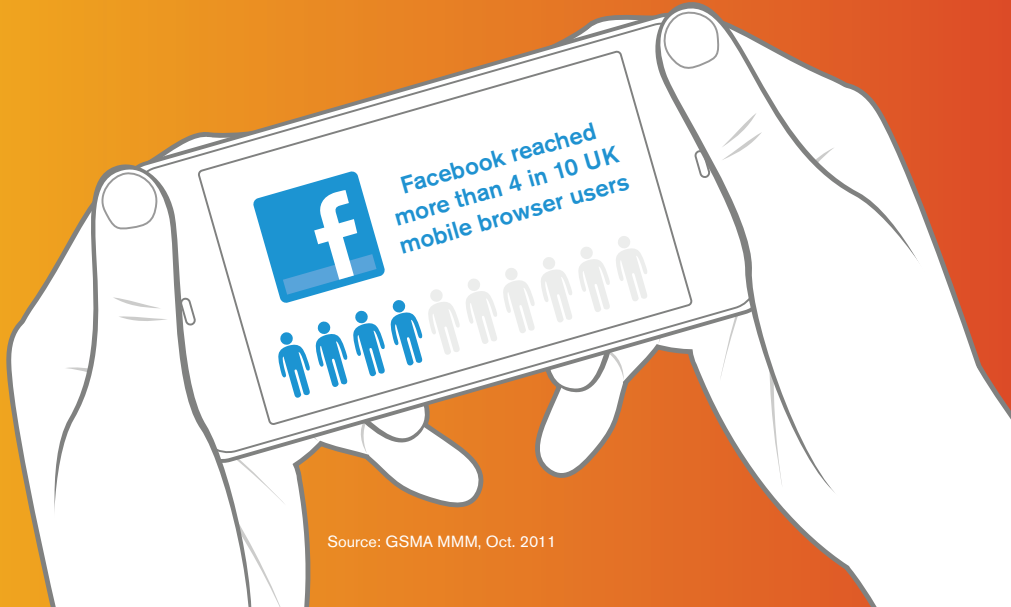
TABLET USAGE SPIKES AT NIGHT

Share of Device Page Traffic Over a Day

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



SOCIAL NETWORKING ON-THE-GO



Source: GSMA MMM, Oct. 2011

MOBILE RETAIL USAGE IS ACCELERATING

Germany was
the fastest growing
mobile retail market
across the EU5.

13.6 million
people accessed a retail
site via smartphone
in the EU5.

+112% since last year



SMARTPHONES OPEN UP A WHOLE NEW WORLD FOR CONSUMERS

22%

of EU5 mobile users took a picture of the product

15%

called friends or family about a product

11%

scanned a product barcode

10%

sent picture to family/friends

[while in store]



Telefonica



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The findings in this booklet are a summary of the “Connected Europe” white paper available on the comScore website.