

Mobile Media

An IAB Europe
White Paper

Issue 1 Consumer insights across Europe



iab.europe

Published in March 2011

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Introduction

Mobile internet advertising spend during 2010 – when advertising revenues generally fell - was worth €710 million, more than double its 2009 total of €279 million (*Source: IHS Screen Digest 2011*).

This report covering 19 European countries presents detailed research findings behind these figures. It springs from IAB Europe's mission to prove the value of the market through research and education.

Mobile advertising wins out on many levels: it enables business to connect with consumers personally and immediately. The odds on their product message getting through to the right person are dramatically reduced. The recipient can respond equally effectively and speedily. What's more the advertiser can track every step of the process and match it to sales outcomes. This not only makes targeting advertising spend easier, but also much more accurately and cheaply than tracking traditional methods of advertising.

If you are thinking of diverting precious advertising budget to mobile, this definitive report has the information you need.

Thanks are due to the Mobile Advertising Committee of IAB Europe who have worked long and hard on producing these findings and to our partners comScore, InSites Consulting and of course Orange for the important contribution they have made.



Alain Heureux
CEO IAB Europe



Ludovic Lévy
Chairman of the mobile committee, IAB Europe
Director of Mobile Advertising, Orange-France Telecom Group

Methodology and Contributors

This report is based on a variety of sources that are the most legitimate to use in each local market and bring the potential, audience and usage of the mobile internet. The objective of this report is to provide local marketers with the most accurate mobile data on each European market. In countries where several sources are available, we chose the most recognised one from the local players. We used one source in countries where there is no other data available.



comScore measures the digital world and the preferred source of digital marketing intelligence. comScore MobiLens™ provides an unparalleled view of the U.S., European and Japanese mobile media landscape, connecting data on mobile consumer behaviour and device capabilities to help you reach and engage consumers. Contact: Jeremy Copp (jcopp@comscore.com).



InSites Consulting is a full-service marketing consultancy doing business with the best known brands all over the world. MC DC investigates what the role of digital media is in the marketer's practice from a consumer point of view. Contact: Gianni Cooreman (gianni@insites.eu).



The European Interactive Advertising Association (www.eiaa.net) has been conducting the industry standard European piece of cross-media consumer research, Mediascope Europe, since 2003 and it has made a major contribution to the understanding of changing media consumption patterns, the evolving consumer and e-commerce trends. Contact : Alison Fennah (afennah@eiaa.net).

Mobile Exposure 2010

Orange released Mobile Exposure 2011, a world exclusive research that measures how mobile media users in the UK, France, Spain and Poland are engaging with mobile content and the mobile internet. Orange is the flagship brand of France Telecom, a leading global telecommunications operator. It has over 131 million internet, TV and mobile customers in the majority of countries in which the Group is present. Contact: Bruce Hoang (bruce.hoang@orange-ftgroup.com)



Belgium

Mobile internet in Belgium has almost reached 20% penetration, making mobile a medium in its own right. The Belgium mobile internet users profile is quite balanced and mirrors the national population. This clearly shows some signs of maturity in terms of usage, although m-commerce and mobile advertising are still in their early days.

Mobile subscribers



8 091 000 mobile subscribers
Penetration of national population: 93%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

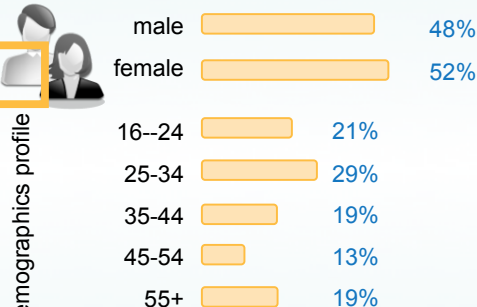
1 396 000 mobile internet users



Users (thous.)	Reach % national pop.	Reach % mob. owners
1 396	16%	17%

•PC internet penetration on national population: 68%

EIAA Mediascope Europe 2010, base: 16+



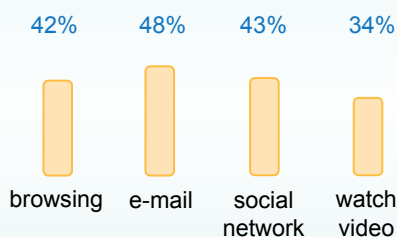
EIAA Mediascope Europe 2010, base: mobile internet users 16+

Mobile internet penetration is still modest in Belgium, representing 17% of mobile subscribers aged 16+.

Interestingly enough, the use of mobile internet is slightly skewed towards females - while most European countries have a 60:40 male/female split of mobile internet users, Half of Belgium mobile internet users are over 35.

Mobile internet activities

Frequency: ever used

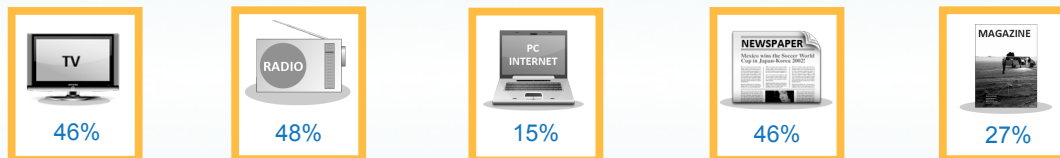


EIAA Mediascope Europe 2010, base: mobile internet users 16+

The primary mobile internet activity in Belgium is e-mail, followed by social networking, browsing and video.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, Belgium mobile internet users primarily listen to the radio, watch TV or read newspapers.

Mobile Advertising



find information
on products and brands - weekly

13%

MCDC 2009, base: mobile internet users 15+

Today a minority of Belgium mobile internet users are using the medium to find information on products, services or brands.

M-commerce

Have purchased products with
mobile phone

1%



MCDC 2009, base: mobile internet users 15+

One percent of today's Belgium mobile internet users purchase products or services through this medium.



Denmark

Unlike the big western European markets, Mobile internet reach in Denmark is still relatively low, with an 11% penetration of mobile subscribers. The 474 000 Danish mobile internet users are predominantly male and aged over 35, suggesting that mobile media has still room for growth across the other demographics.

Mobile subscribers



4 230 000 mobile subscribers
Penetration of national population: 94%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

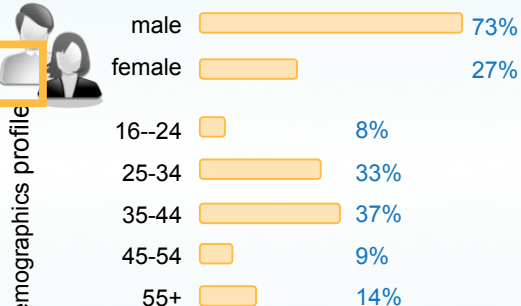
474 000 mobile internet users



Users (thous.)	Reach % national pop.	Reach % mob. owners
474	11%	11%

•PC internet penetration on national population: 84%

EIAA Mediascope Europe 2010, base: 16+



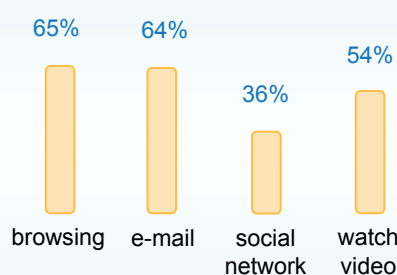
EIAA Mediascope Europe 2010, base: mobile internet users 16+

Mobile internet penetration is still relatively low in Denmark, representing 11% of mobile subscribers aged 16+.

The use of mobile internet is currently a predominantly male phenomenon in Denmark. In terms of age, a majority of mobile internet users are older than 35.

Mobile internet activities

Frequency: ever used

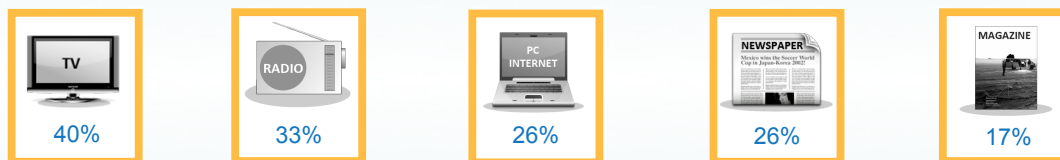


EIAA Mediascope Europe 2010, base: mobile internet users 16+

The primary mobile internet activity in Denmark is browsing, followed closely by e-mail, video and social networking.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, Danish mobile internet users primarily watch TV or listen to the radio.

Mobile Advertising



find information
on products and brands - weekly

10%

MCDC 2009, base: mobile internet users 15+

A minority of Danish mobile internet users access information on products, services or brands through this medium.

M-commerce

Have purchased products with
mobile phone

2%



MCDC 2009, base: mobile internet users 15+

A minimal proportion of Danish mobile internet users purchase products or services using this medium.



Finland

Finland has by far the highest mobile phone penetration and one of the highest mobile internet penetrations, making it one of Europe's most developed mobile markets. The Finnish are keen on email (34%), followed by social network (16%) and geolocalisation (15%).

Mobile subscribers



4 437 000 mobile subscribers
Penetration on national population: 99%

MCDC 2009; Population reference bureau, base: 15+

Mobile internet audience

1 198 000 mobile internet users per month



Users (thous.)	Reach % national pop.	Reach % mob. owners
1 198	27%	27%

MCDC 2009, base: 15+

Mobile internet has reached than a quarter of the Finnish population, making mobile a media on its own.

Mobile internet activities

Frequency: at least one weekly



MCDC 2009, base: mobile internet users 15+

The primary mobile internet activity in Finland is e-mail, followed by social networking, geolocalisation, instant messaging, radio listening, music downloads and video.

Mobile Advertising

find information
on products and brands - weekly



27%

MCDC 2009, base: mobile internet users 15+

More than a quarter of Finnish mobile internet users use mobile internet to find information on products, services or brands.

M-commerce

Have purchased products with
mobile phone

5%



MCDC 2009, base: mobile internet users 15+

Today a modest proportion of Finnish mobile internet users employ their mobile phone to purchase products or services.



France

France's internet penetration is in line with other western European markets, at 28% of mobile users, making it one of Europe's largest markets with almost 15 million users. There is a 60:40 male:female split and is evenly distributed across the age groups, with 13% of users being over 55.

Mobile internet is most frequently used for viewing news content and for emailing.

Mobile subscribers



47 000 000 mobile subscribers

Comscore Mobilens 3 months average ended July 2010, base: 13+

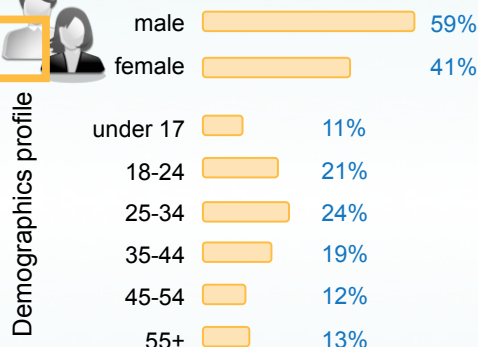
Mobile internet audience

14 775 000 mobile internet users per month



Users (thous.)	vs 2009	Reach % on mobile population
14 755	+21%	31%

*Comscore Mobilens 3 months average ended July 2010 / 2009
base: mobile users 13+*



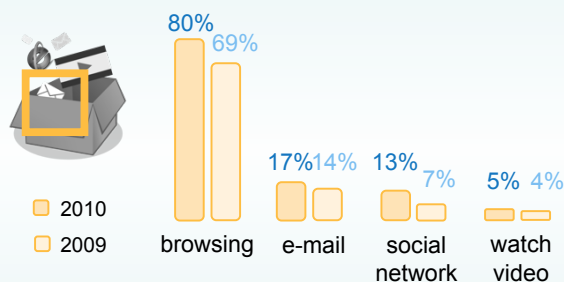
*Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+*

Mobile internet in France represents almost a third of mobile subscribers, making mobile a media in its own.

The gender split of the mobile internet users in France is currently 60:40 male:female., with the under 25 age group accounting for a large share of the users.

Mobile internet activities

Frequency: at least once weekly

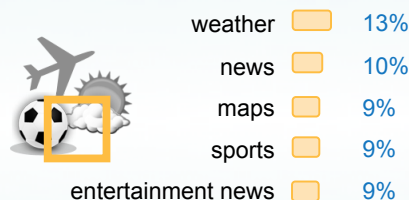


*Comscore Mobilens 3 months average ended July 2010/2009
base: mobile internet users 13+*

The dominant mobile internet activity in France is browsing, followed by e-mail, social networking and video. The biggest yearly growths occur within browsing and social networking.

Mobile internet: top 5 content categories

Frequency: at least once weekly



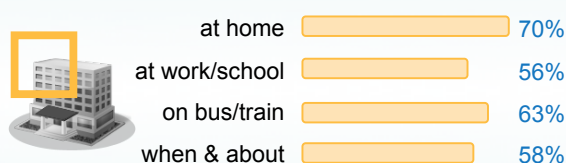
Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

The mobile internet function most frequently accessed in France is the weather, followed by news, maps, sports and entertainment news.

Place of connection

Mobile internet in France is chiefly accessed from home, followed by public transport, when out and about and then at work/school.

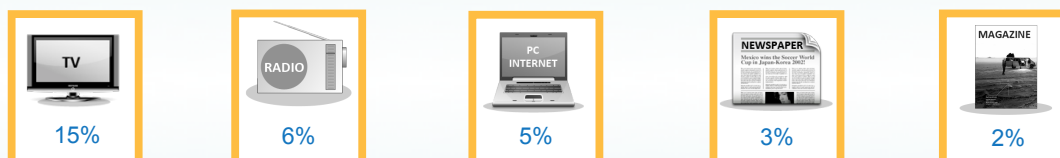
At least one usage of mobile media



Mobile Exposure 2010, base: mobile media users 16+

Media mesh with mobile internet

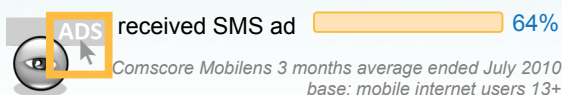
When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, French mobile internet users primarily watch TV.

Mobile Advertising



Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

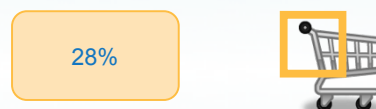
interested in mobile ad formats :
display, direct marketing,
geolocalisation... 65%

Mobile Exposure 2010, base: mobile media users 16+

Two thirds of French mobile internet users are interested in at least one mobile advertising format. 64% say they have already received an sms ad on their phone.

M-commerce

used mobile to pay / redeem / reserve



Mobile Exposure 2010, base: mobile media users 16+

Three out of ten French mobile internet user have used their mobile to either pay, redeem or reserve an item.



Germany

At 20%, Germany's mobile internet penetration level is slightly lower than the other western European countries. However, Germany still has Europe's second largest mobile internet population with 16 million adults.

Mobile internet is still a male phenomenon, with 37% of mobile internet users being female. Mobile internet use has a strong hold in the 35-54 age group. Most German users access the internet through a browser on their phone (70%), and many have paid for goods and services using mobile internet.

Mobile subscribers



53 000 000 mobile subscribers

Comscore Mobilens 3 months average ended July 2010, base: 13+

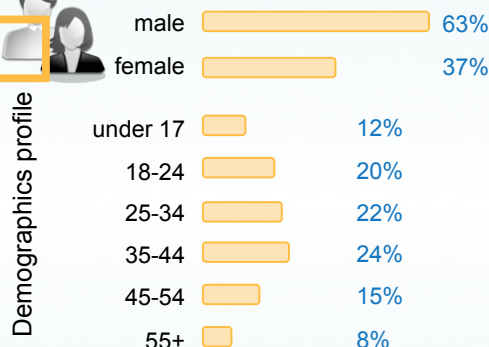
Mobile internet audience

16 077 000 mobile internet users per month



Users (thous.)	vs 2009	Reach % on mobile population
16 077	+33%	30%

*Comscore Mobilens 3 months average ended July 2010 / 2009
base: mobile users 13+*



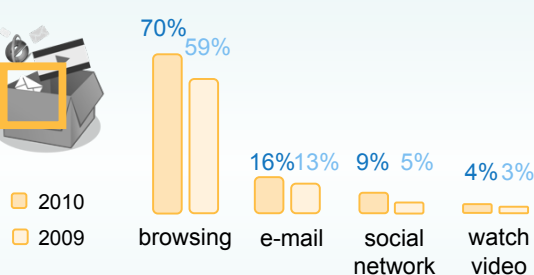
*Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+*

Mobile internet in Germany represents almost a third of mobile subscribers, making mobile a medium in its own right.

The gender split of the mobile internet users in Germany is currently around 60:40 male:female. Use of mobile internet is still a male phenomenon, with only 37% of mobile internet users being female. As with the other 'Big 5' markets, the under 25 age group accounts for a large share of the mobile internet users.

Mobile internet activities

Frequency: at least once weekly

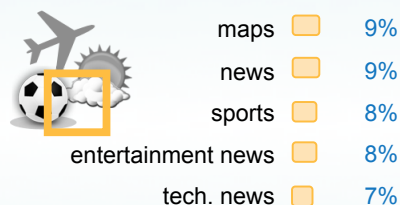


*Comscore Mobilens 3 months average ended July 2010/2009
base: mobile internet users 13+*

The leading mobile internet activity in Germany is browsing, followed by e-mail, social networking and video. The biggest yearly growth can be found within browsing.

Mobile internet: top 5 content categories

Frequency: at least once weekly

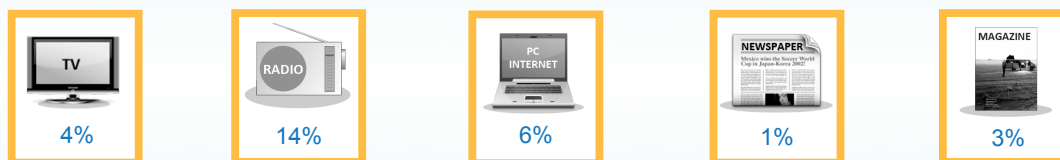


Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

The mobile internet function most frequently accessed in Germany is maps on par with news, followed closely by sports, entertainment news and tech news.

Media mesh with mobile internet

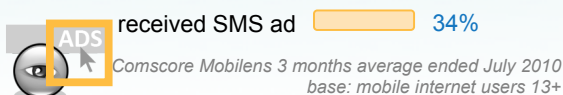
When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, German mobile internet users primarily listen to the radio.

Mobile Advertising



Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

MCDC 2009, base: mobile internet users 15+

Three out of ten German mobile internet users say they have already received an sms ad on their phone. 10% have used his/her mobile to find information on products or brands in the last week.

M-commerce

accessed electronic payment



Comscore Mobilens 3 months average ended July 2010/2009
base: mobile internet users 13+

7% of German mobile internet users have accessed electronic payment. This is a 40% increase from 2009.



Greece

With 84% reach, mobile use is already strong in Greece, and with mobile internet use at 13% the market is in a good position for growth. Greek mobile internet users are keen on email (34%), instant messaging (23%) and radio (22%).

Mobile subscribers



9 426 000 mobile subscribers
Penetration on national population: 97%

MCDC 2009; Population reference bureau, base: 15+

Mobile internet audience

1 225 000 mobile internet users per month



Users (thous.)	Reach % national pop.	Reach % mob. owners
1 225	13%	13%

MCDC 2009, base: 15+

Mobile internet usage is still relatively low in Greece, representing 13% penetration of mobile subscribers aged 16+.

Mobile internet activities

Frequency: at least one weekly



e-mail	34%
instant message	23%
Listen to radio	22%
social network	18%
geolocalisation	17%
watch video	7%
download music	6%

MCDC 2009, base: mobile internet users 15+

The foremost mobile internet activity in Greece is e-mail, followed by instant messaging, radio, social networking, geolocalisation, video and music downloads.

Mobile Advertising

find information
on products and brands - weekly



20%

MCDC 2009, base: mobile internet users 15+

A fifth of Greek mobile internet users employ mobile internet to find information on products, services or brands.

M-commerce

have purchased products with
mobile phone

6%



MCDC 2009, base: mobile internet users 15+

A modest proportion of Greek mobile internet users purchase products or services through this medium.



Hungary

Hungary is a developing market where mobile internet is emerging. Over three quarters of Hungarian adults use mobile phones, of which 10% already use their phone for internet connection. Mobile internet users are most likely to be listening to radio with their mobile (31%) and use geolocalisation services (24%).

Mobile subscribers



8 330 000 mobile subscribers
Penetration on national population: 98%

MCDC 2009; Population reference bureau, base: 15+

Mobile internet audience

833 000 mobile internet users per month



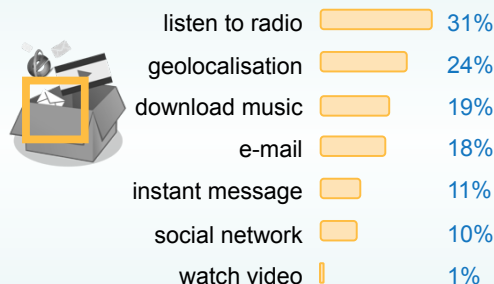
Users (thous.)	Reach % national pop.	Reach % mob. owners
833	10%	10%

MCDC 2009, base: 15+

Mobile internet is still relatively low in Hungary, representing 10% penetration of mobile subscribers aged 16+.

Mobile internet activities

Frequency: at least one weekly



MCDC 2009, base: mobile internet users 15+

The chief mobile internet activity in Hungary is radio, followed by geolocalisation, music downloads, e-mail, instant messaging, social network and video.

Mobile Advertising

find information on products and brands - weekly



13%

MCDC 2009, base: mobile internet users 15+

Today a moderate proportion of Hungarian mobile internet users utilize mobile internet to find information on products, services or brands.

M-commerce

have purchased products with mobile phone

2%



MCDC 2009, base: mobile internet users 15+

Only 2% of Hungarian mobile internet users used their mobile phone to purchase goods or services, confirming that m-commerce has still potential for growth.



Italy

Italy has a high mobile internet penetration, with 26% of the population using internet via mobile, making one of the largest markets with 16 million users.

The users in Italy are more mature than in many other markets, with 53% of users being over 35.

Italian users are the most likely in western Europe to have used the internet on their mobile to pay for goods or services.

Mobile subscribers



47 000 000 mobile subscribers

Comscore Mobilens 3 months average ended July 2010, base: 13+

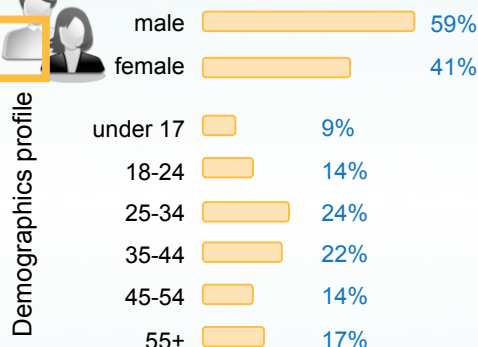
Mobile internet audience

15 826 000 mobile internet users per month



Users (thous.)	vs 2009	Reach % on mobile population
15 826	+22%	34%

*Comscore Mobilens 3 months average ended July 2010 / 2009
base: mobile users 13+*



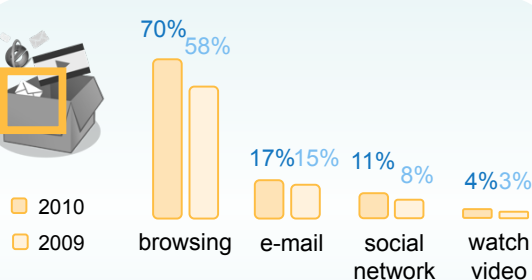
*Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+*

Mobile internet in Italy represents a third of mobile subscribers, making mobile a media in its own right.

The gender split of the mobile internet users in Italy is currently around 60:40 male:female. While many of the other 'Big 5' markets see the under 25 age group accounting for a disproportionately large proportion of users, in Italy the mobile internet user is likely to be slightly older, with the bulk of users being in the 35 to 55 age group.

Mobile internet activities

Frequency: at least once weekly



*Comscore Mobilens 3 months average ended July 2010/2009
base: mobile internet users 13+*

The chief mobile internet activity in Italy is browsing, followed by e-mail, social networking and video. Browsing displays the biggest yearly growth.

Mobile internet: top 5 content categories

Frequency: at least once weekly

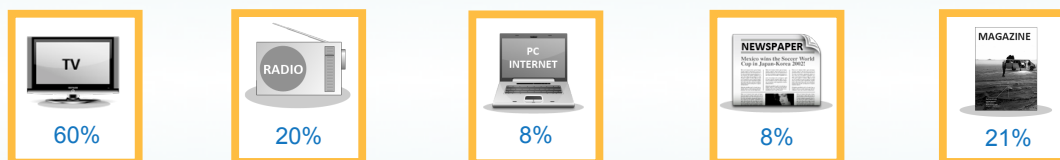


Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

The most frequently used function through mobile internet in Italy is maps and weather, followed by tech. news, sports and entertainment news.

Media mesh with mobile internet

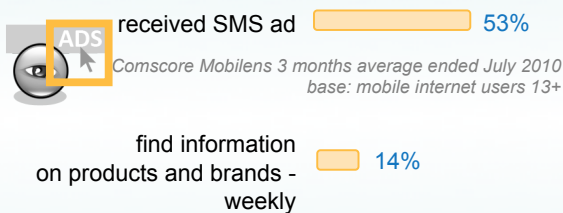
When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, Italian mobile internet users primarily watch TV.

Mobile Advertising



Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

MCDC 2009, base: mobile internet users 15+

Five out of ten Italian mobile internet users say they have already received an sms ad on their phone. 14% have used his/her mobile to find information on products or brands in the last week.

M-commerce

accessed electronic payment



Comscore Mobilens 3 months average ended July 2010/2009
base: mobile internet users 13+

9% of Italian mobile internet users have accessed electronic payment. This is a 50% increase from 2009.



The Netherlands

Penetration of mobile internet in the Netherlands is still relatively low. A vast majority of the 1.4M Dutch mobile media users are male and aged over 35, which confirms that mobile internet is still a niche phenomenon. Yet already a quarter of mobile internet users employ mobile internet to find information on products, suggesting an interesting advertising potential for mobile in this country.

Mobile subscribers



12 420 000 mobile subscribers
Penetration on national population: 90%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

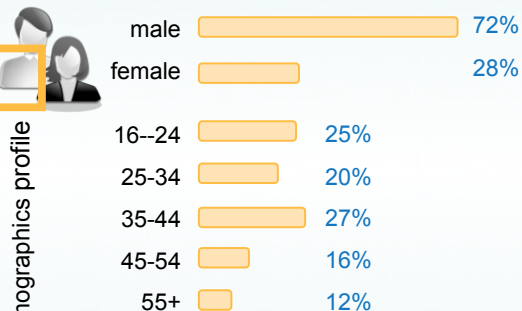
1 389 000 mobile internet users



Users (thous.)	Reach % national pop.	Reach % mob. owners
1 389	10%	11%

•PC internet penetration on national population: 84%

EIAA Mediascope Europe 2010, base: 16+



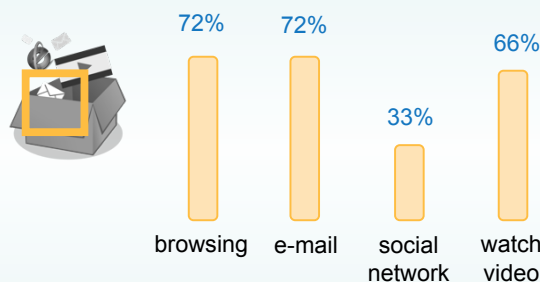
EIAA Mediascope Europe 2010, base: mobile internet users 16+

Mobile internet is still relatively low in the Netherlands, representing 11% penetration of mobile subscribers aged 16+.

The use of mobile internet is currently a predominantly male phenomenon in the Netherlands. In terms of age, a majority of mobile internet users are older than 35.

Mobile internet activities

Frequency: ever used

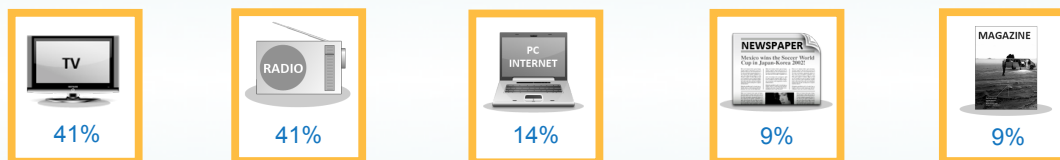


EIAA Mediascope Europe 2010, base: mobile internet users 16+

The chief mobile internet activity in the Netherlands is e-mail on par with browsing, followed by video and social networking.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, Dutch mobile internet users primarily listen to the radio or watch TV.

Mobile Advertising



find information
on products and brands - weekly

23%

MCDC 2009, base: mobile internet users 15+

Almost a quarter of Dutch mobile internet users utilize mobile internet to find information on products, services or brands.

M-commerce

have purchased products with
mobile phone

3%



MCDC 2009, base: mobile internet users 15+

A minimal proportion of Dutch mobile internet users purchase products or services through this medium.



Norway

With a 14% penetration within the population, mobile internet in Norway has room for growth: the mere 542,000 Norwegian mobile internet users are mostly male and over 35. Mobile advertising is full of future opportunities, as 27% of users say they use mobile internet to find information on products, services or brands.

Mobile subscribers



3 686 000 mobile subscribers
Penetration on national population: 97%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

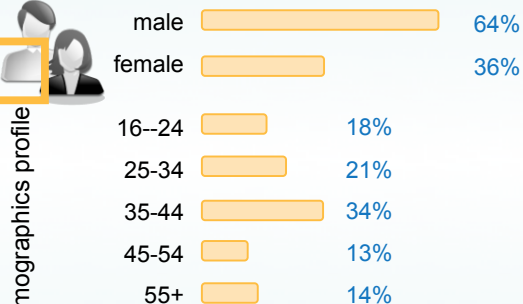
542 000 mobile internet users



Users (thous.)	Reach % national pop.	Reach % mob. owners
542	14%	15%

•PC internet penetration on national population: 84%

EIAA Mediascope Europe 2010, base: 16+



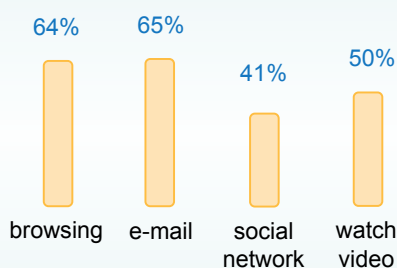
EIAA Mediascope Europe 2010, base: mobile internet users 16+

Mobile internet is still relatively low in Norway, representing 15% penetration of mobile subscribers aged 16+.

The use of mobile internet is currently a primarily male phenomenon in Norway. In terms of age, a majority of mobile internet users are older than 35.

Mobile internet activities

Frequency: ever used

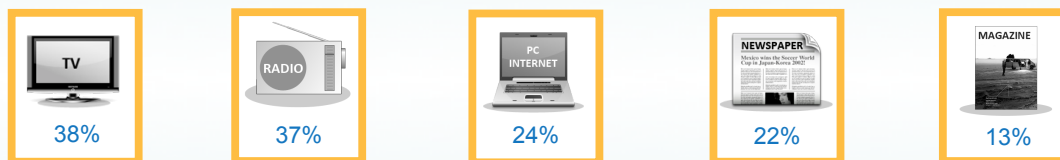


EIAA Mediascope Europe 2010, base: mobile internet users 16+

The primary mobile internet activity in Norway is e-mail, followed closely by browsing, then video and social networking.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, Norwegian mobile internet users primarily watch TV and listen to the radio.

Mobile Advertising



find information
on products and brands - weekly

27%

MCDC 2009, base: mobile internet users 15+

More than a quarter of Norwegian mobile internet users use mobile internet to find information on products, services or brands.

M-commerce

Have purchased products with
mobile phone

5%



MCDC 2009, base: mobile internet users 15+

A modest proportion of Norwegian mobile internet users purchase products or services through this medium.



Poland

Internet mobile has a moderate coverage of 16% in Poland but the 4.8 million users are among the most advanced & experienced population with their device. A large majority of them browse on many content categories, communicate and watch video on the move. They also are open -minded about any mobile ad formats and mostly have already purchased via their mobile.

Mobile subscribers



29 757 000 mobile subscribers
Penetration on national population: 91%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

4 833 000 mobile internet users



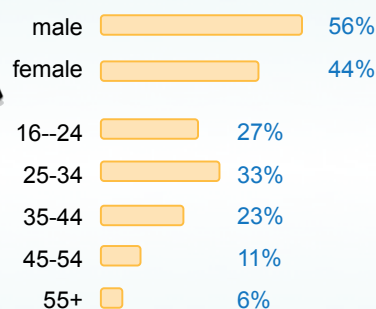
Users (thous.)	Reach % national pop.	Reach % mob. owners
4 833	15%	16%

•PC internet penetration on national population: 51%

EIAA Mediascope Europe 2010, base: 16+



Demographics profile



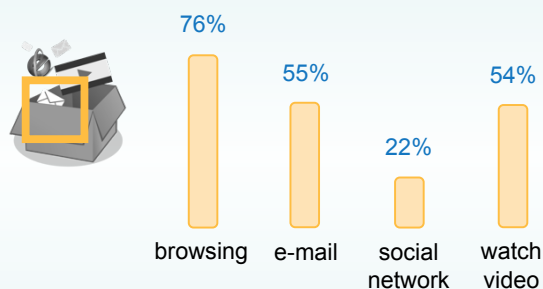
EIAA Mediascope Europe 2010, base: mobile internet users 16+

In Poland 4.8 million of 16+ are mobile internet users, corresponding to a 15% reach.

The gender profile is composed by 56% of men and 44% of women. Almost 85% are under 45.

Mobile internet activities

Frequency: ever used



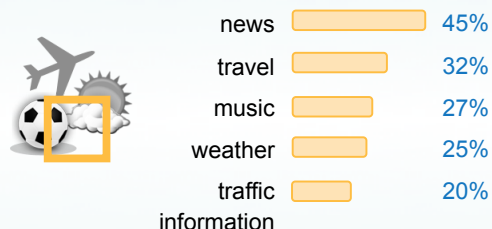
EIAA Mediascope Europe 2010, base: 16+

Three quarters of Polish internet mobile users have browsed on their handset.

Over fifty percent have already sent/received e-mails and watched video; and nearly a quarter use their mobile to access social networking sites.

Mobile internet: top 5 content categories

Frequency: often



Comscore Mobilians 3 months average ended July 2010
base: mobile internet users 13+

The primary category the Polish mobile internet users access is the news.

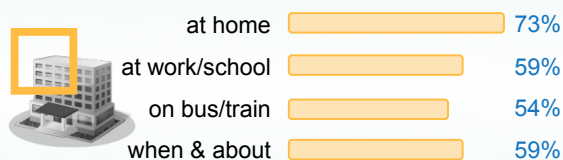
Secondly, nearly a third consult travel content and then over a quarter search for music content.

They also browse frequently to find information about weather and traffic.

Place of connection

Mobile internet in Poland is mainly accessed from home. This is followed by work/school on par with out and about. Public transport follows close behind.

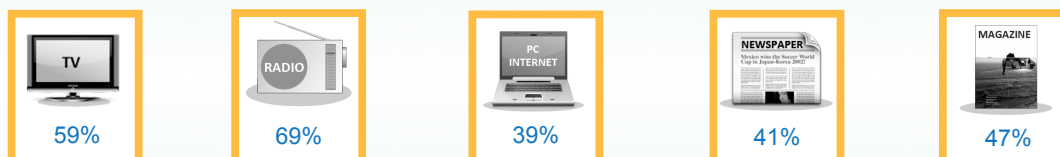
At least one usage of mobile media



Mobile Exposure 2010, base: mobile media users 16+

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

Poland is the unique European country where media meshing is so high and with any media.

When they mainly use the internet on their handset, they are 39% to surf sometimes on PC and up to 69% to listen the radio at the same time.

Mobile Advertising



interested in mobile ad formats :
display, direct marketing,
geolocalisation...



Mobile Exposure 2010, base: mobile media users 16+

Over three quarters of mobile internet users are interested in any form of advertising on their device.

M-commerce

used mobile to pay / redeem / reserve

55%



Mobile Exposure 2010, base: mobile media users 16+

The majority of Polish users have been persuaded by M-commerce to purchase through their handset.



Portugal

Portugal is a burgeoning market for mobile internet. Despite the fact that nearly 100% of Portuguese own a mobile phone, only 5% use mobile internet, the lowest rate in Europe. As an illustration of this current niche market, the profile of the mobile internet user is predominantly male and young. However, these users have embraced an intense activity across mobile internet. This trend opens up large-scale development for the media in the months to come.

Mobile subscribers



8 730 000 mobile subscribers
Penetration on national population: 97%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

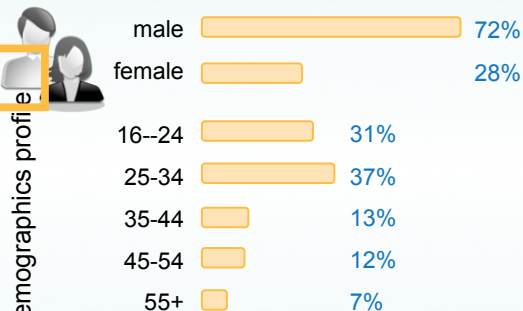
461 000 mobile internet users



Users in 000	Reach % national pop.	Reach % mob. owners
461	5%	5%

•PC internet penetration on national population: 51%

EIAA Mediascope Europe 2010, base: 16+



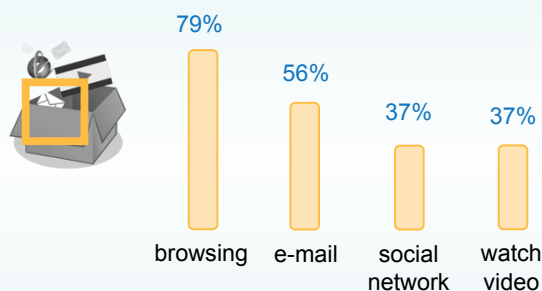
EIAA Mediascope Europe 2010, base: mobile internet users 16+

Portugal contains almost 9 million mobile owners, but only 461 000 internet users on their handset. Portugal, as an emerging market within this industry, has the lowest rate in Europe. The PC internet penetration is 10 times higher than mobile.

The mobile internet population is strongly characterised by the male gender and the youth: 72% are male and 68% are under 35.

Mobile internet activities

Frequency: ever used

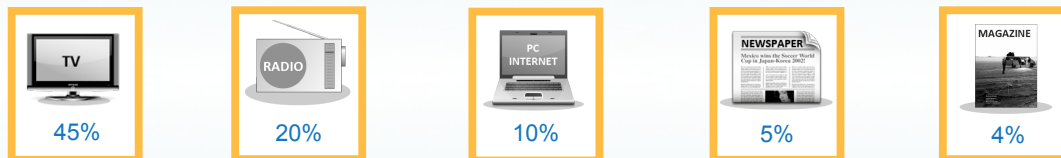


EIAA Mediascope Europe 2010, base: mobile internet users 16+

The Portuguese mobile internet consumer principally uses their handset to browse, and over half of users communicate by e-mailing. Over a third watch video and access social networking sites.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, the mobile internet users primarily watch TV or listen to the radio.



Romania

Romania is a developing market, where mobile is gaining a strong foothold. Although over three quarters of Romanian adults use mobile phones, only 15% use their handsets for internet connection. Mobile internet users in Romania are most likely to use their phones for email (32% and radio (22%).

Mobile subscribers



17 910 000 mobile subscribers
Penetration on national population: 98%

MCDC 2009; Population reference bureau, base: 15+

Mobile internet audience

2 686 000 mobile internet users per month



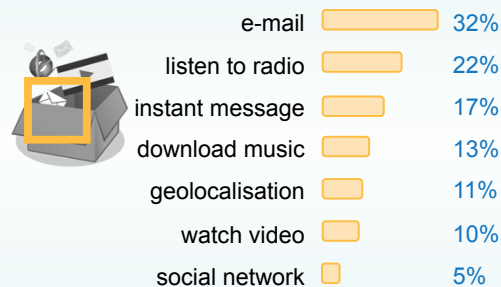
Users (thous.)	Reach % national pop.	Reach % mob. owners
2 686	15%	15%

MCDC 2009, base: 15+

Mobile internet use is still relatively low in Romania, representing 15% penetration of mobile subscribers aged 16+.

Mobile internet activities

Frequency: at least one weekly



MCDC 2009, base: mobile internet users 15+

The primary mobile internet activity in Romania is e-mail, followed by radio, instant messaging, music download, geolocalisation, video and finally social network.

Mobile Advertising

find information
on products and brands - weekly



30%

MCDC 2009, base: mobile internet users 15+

Almost a third of Romanian mobile internet users use mobile internet to find information on products, services or brands.

M-commerce

have purchased products with
mobile phone

1%



MCDC 2009, base: mobile internet users 15+

A mere 1% of Romanian mobile internet users used their mobile phone to purchase a product or service, confirming that m-commerce has great potential for growth.



Russia

The most populated country in Europe, Russia offers a healthy potential market for mobile internet with more than 112 million of mobile owners but only a coverage of 16% among them.

The major activity of the Russian mobile internet users is e-mailing. New mobile equipment and an easier access to the variety of usages will certainly boost the mobile media in the nearly next years.

Mobile subscribers



112 142 000 mobile subscribers
Penetration on national population: 94%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

18 227 000 mobile internet users



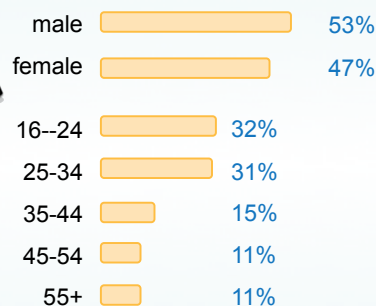
Users (thous.)	Reach % national pop.	Reach % mob. owners
18 227	15%	16%

•PC internet penetration on national population: 33%

EIAA Mediascope Europe 2010, base: 16+



Demographics profile



EIAA Mediascope Europe 2010, base: mobile internet users 16+

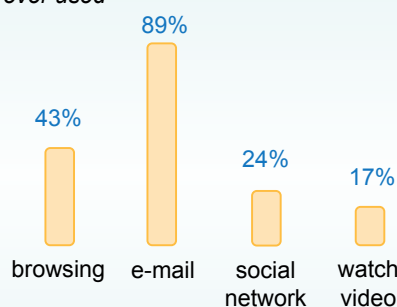
With 18 227 000 mobile internet users Russia ranks 2nd behind the UK. But this significant number of users incorporates a moderate reach of 15%.

In comparison, the reach of PC internet is more than double: 33%

The mobile internet users are mostly young: almost 2/3 of them are under 34.

Mobile internet activities

Frequency: ever used

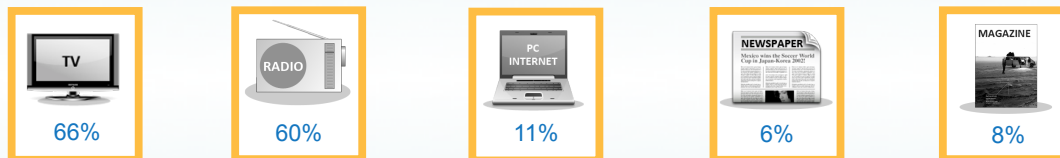


EIAA Mediascope Europe 2010, base: mobile internet users 16+

Russian mobile internet use is dominated by email, at nearly 90%. Browsing, social networking and video account for other mobile internet activities.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

The Russian internet mobile users frequently mix their media consumption with TV and radio. 66% watch TV and 60% listen to the radio during a mobile internet session.



Spain

Spain has a high mobile internet penetration, with 26% of the population using internet via mobile. It has a substantial market of 12 million users. The users in Spain are more mature than in many other markets, with 50% being over 35.

Mobile internet is most frequently used for viewing news content and for emailing.

Mobile subscribers



35 000 000 mobile subscribers

Comscore Mobiliens 3 months average ended July 2010, base: 13+

Mobile internet audience

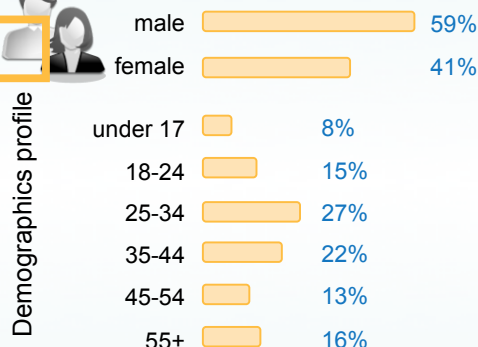
11 949 000 mobile internet users per month



Users (thous.)	vs 2009	Reach % on mobile population
11 949	+22%	34%

*Comscore Mobiliens 3 months average ended July 2010 / 2009
base: mobile users 13+*

Mobile internet in Spain represents a third of mobile subscribers, making mobile a media in its own right.

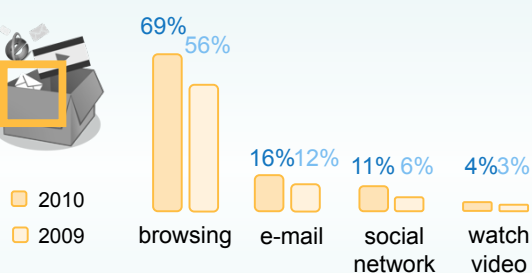


*Comscore Mobiliens 3 months average ended July 2010
base: mobile internet users 13+*

The gender split of the mobile internet users in Spain is currently 60:40 male:female. While many of the other 'Big 5' markets see the under 25 age group accounting for a disproportionately large proportion of users, in Spain the mobile internet user is likely to be slightly older, with the bulk of users being in the 35 to 55 age group.

Mobile internet activities

Frequency: at least once weekly

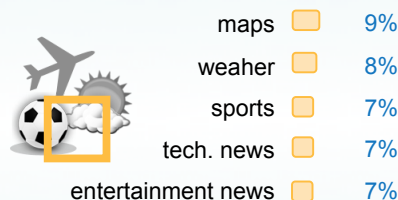


*Comscore Mobiliens 3 months average ended July 2010/2009
base: mobile internet users 13+*

The leading mobile internet activity in Spain is browsing, followed by e-mail, social networking and video. The biggest yearly growth can be seen within browsing.

Mobile internet: top 5 content categories

Frequency: at least once weekly



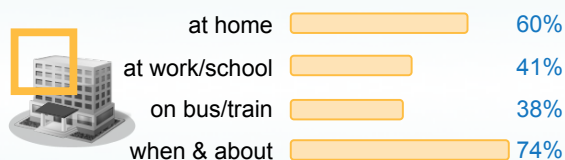
Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

The mobile internet function most frequently accessed in Spain is maps, followed closely by weather, news, sports and entertainment news.

Place of connection

Mobile internet in Spain is predominantly accessed when out and about, represented by nearly three quarters of users accessing internet at this time through their mobile. This is followed by home, then work/school, and public transport.

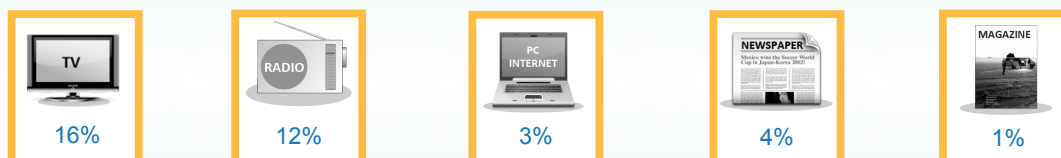
At least one usage of mobile media



Mobile Exposure 2010, base: mobile media users 16+

Media mesh with mobile internet

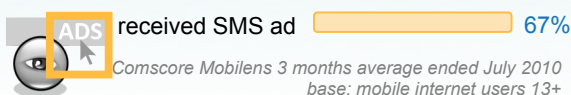
When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

In comparison to some other nationalities, the Spanish do not frequently mesh media when using mobile internet. When they do, they are most likely to watch TV or listen to the radio.

Mobile Advertising



Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

interested in mobile ad formats :
display, direct marketing,
geolocalisation... 65%

Mobile Exposure 2010, base: mobile media users 16+

Two thirds of Spanish mobile internet users are interested in at least one mobile advertising format. 67% say they have already received an sms ad on their phone.

M-commerce

used mobile to pay / redeem / reserve

36%



Mobile Exposure 2010, base: mobile media users 16+

36% of Spanish mobile internet users have used their mobile to either pay, redeem or reserve something.



Sweden

Sweden has embraced mobile media: with already 20% penetration of mobile internet, there is every reason to expect a rapid adoption of mobile advertising in this country. As an illustration, most of the 1.5M Swedish mobile internet users are younger than in other European countries, confirming that mobile media is broadening across all population segments.

Mobile subscribers



7 144 000 mobile subscribers
Penetration on national population: 94%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

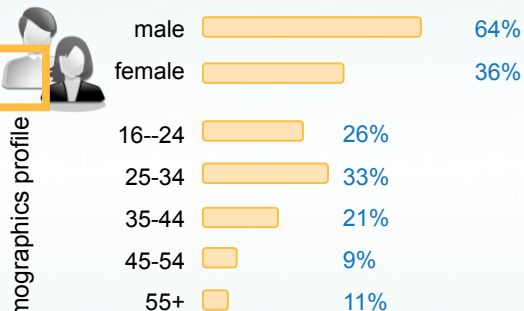
1 511 000 mobile internet users



Users (thous.)	Reach % national pop.	Reach % mob. owners
1 511	20%	21%

•PC internet penetration on national population: 81%

EIAA Mediascope Europe 2010, base: 16+



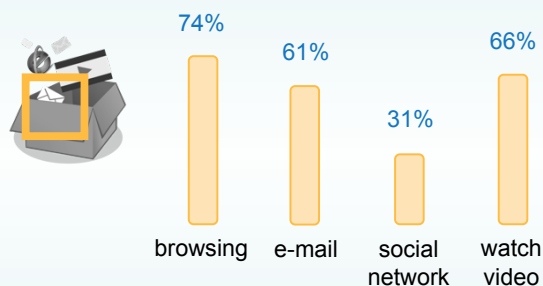
EIAA Mediascope Europe 2010, base: mobile internet users 16+

Mobile internet has reached the 20% penetration level in Sweden, making mobile a medium in its own right.

The use of mobile internet is currently a primarily male phenomenon in Sweden. In terms of age, a majority of mobile internet users are under 35, showing that mobile media is broadening across the population in this country.

Mobile internet activities

Frequency: ever used

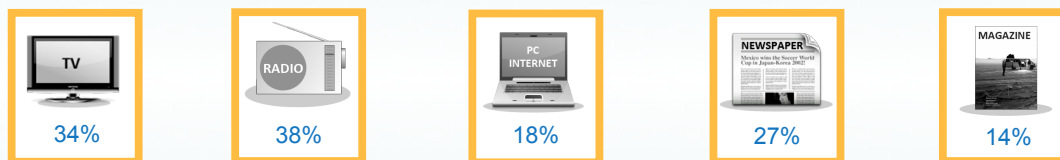


EIAA Mediascope Europe 2010, base: mobile internet users 16+

The primary mobile internet activity in Sweden is browsing, followed by video, e-mail and social networking.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, Swedish mobile internet users primarily listen to the radio, watch TV or read newspapers.

Mobile Advertising



find information
on products and brands - weekly

14%

MCDC 2009, base: mobile internet users 15+

Currently a modest proportion of Swedish mobile internet users employ this medium to find information on products, services or brands.

M-commerce

have purchased products with
mobile phone

3%



MCDC 2009, base: mobile internet users 15+

A minimal proportion of Swedish mobile internet consumers use their mobile phone to purchase products or services.



Switzerland

Mobile Internet is on the path of maturity in Switzerland.

After the big five, Switzerland has one of the highest mobile internet reaches in Europe. Most of the 1 147 000 mobile internet users have experienced numerous usages on mobile, considering it a medium in its own right.

Mobile Internet has also become a relevant tool in their consumption as a source of information and a purchase channel.

Mobile subscribers



6 144 000 mobile subscribers
Penetration on national population: 96%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

1 147 000 mobile internet users



Users (thous.)	Reach % national pop.	Reach % mob. owners
1 147	18%	19%

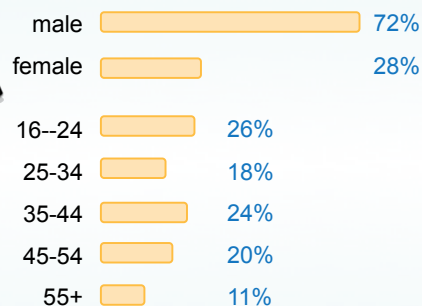
•PC internet penetration on national population: 84%

EIAA Mediascope Europe 2010, base: 16+

The coverage of mobile internet is 18% among the national population.



Demographics profile



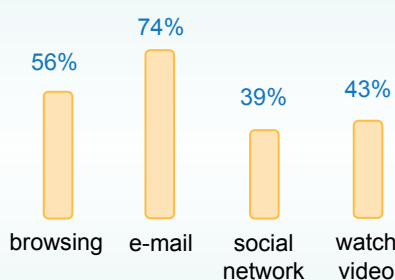
EIAA Mediascope Europe 2010, base: mobile internet users 16+

The gender split of the mobile internet users is characterised by an overwhelmingly high proportion of male users, representing nearly three quarters of this audience.

In terms of age Switzerland has the most homogeneous breakdown.

Mobile internet activities

Frequency: ever used



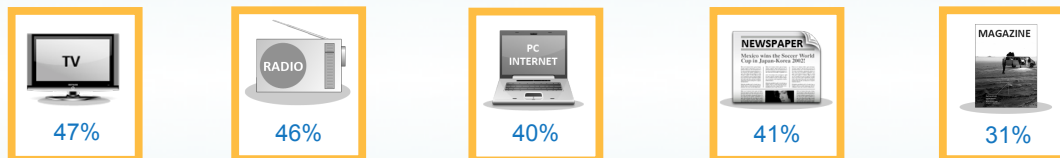
EIAA Mediascope Europe 2010, base: mobile internet users 16+

The Swiss mobile internet users have a high level of usage across many areas.

They primarily use e-mailing, then browsing, video watching and social networking.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

The Swiss mobile internet users are keen on mediameshing.

TV, radio, internet on PC, newspapers and magazine are part of their media consumption while using mobile internet.

Mobile Advertising



find information
on products and brands - weekly

16%

MCDC 2009, base: mobile internet users 15+

16% of the mobile internet users say they search every week for information on products or brands.

M-commerce

have purchased products with
mobile phone

14%



MCDC 2009, base: mobile internet users 15+

M-commerce already concerns 14% of Swiss mobile internet users.



Turkey

More than a fifth of Turkish people use mobile internet. But most importantly, the mobile internet penetration is slightly higher than the PC internet reach ! This is the noticeable feature of Turkey. This phenomenon does not exist elsewhere in Europe.
The core of the mobile internet users' profile is under 45.

Mobile subscribers



50 310 000 mobile subscribers
Penetration on national population: 90%

EIAA Mediascope Europe 2010, base: 16+

Mobile internet audience

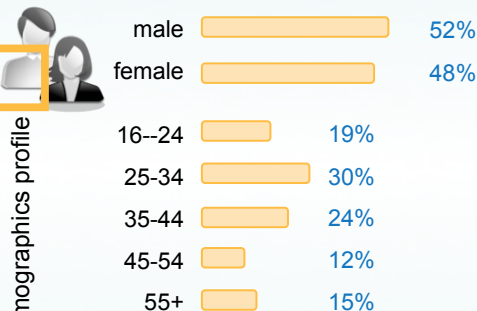
11 957 000 mobile internet users



Users (thous.)	Reach % national pop.	Reach % mob. owners
11 957	21%	24%

•PC internet penetration on national population: 20%

EIAA Mediascope Europe 2010, base: 16+



EIAA Mediascope Europe 2010, base: mobile internet users 16+

The rate of mobile internet users has reached 21% among the Turkish population 16+.

Turkey is unique within Europe, as its mobile internet penetration is slightly higher than the PC internet coverage (20%).

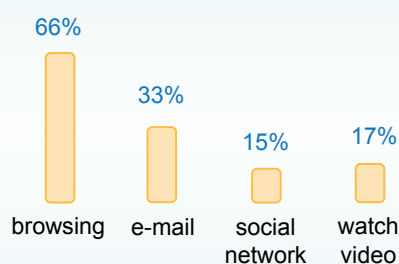
The breakdown of user profiles in terms of gender is almost equal : male 52% ; female 48%.

More than 50% of the mobile internet users are between 25-44.

But it is also noticeable that the proportion of 55 + is one of the most significant in Europe: 15%.

Mobile internet activities

Frequency: ever used



EIAA Mediascope Europe 2010, base: mobile internet users 16+

The Turkish mobile internet users currently remain limited in the variety of mobile internet activities that they participate in.

Just two-thirds of them have ever browsed on their handset, and only a third have emailed through this medium. Under a quarter have experienced social networking or video watching through mobile internet.

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

The simultaneous media consumption from mobile internet users with TV is particularly high: half of them say they sometimes watch TV while they use the internet on their mobile.
18% read newspapers and 14% surf the Internet on a PC when are accessing the internet on their mobile.



The United Kingdom

With almost 18 million mobile internet users, the UK has Europe's largest internet population. The profile shows a slight bias towards the under 25s and male user, with 39% of users being female. However other age groups are also well represented with 29% of users being aged 35-54. 80% of UK users access their internet browser on their mobiles, while 15% use their device for email and 14% for social networking

Mobile subscribers



48 500 000 mobile subscribers

Comscore Mobilens 3 months average ended July 2010, base: 13+

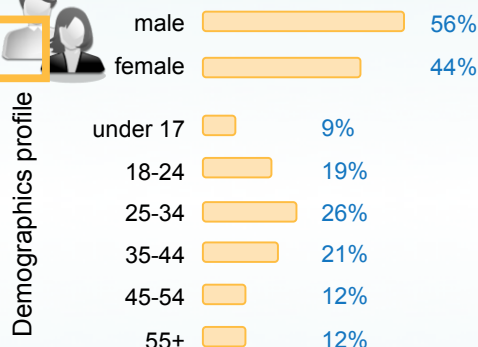
Mobile internet audience

20 980 000 mobile internet users per month



Users (thous.)	vs 2009	Reach % on mobile population
20 980	+34%	43%

*Comscore Mobilens 3 months average ended July 2010 / 2009
base: mobile users 13+*



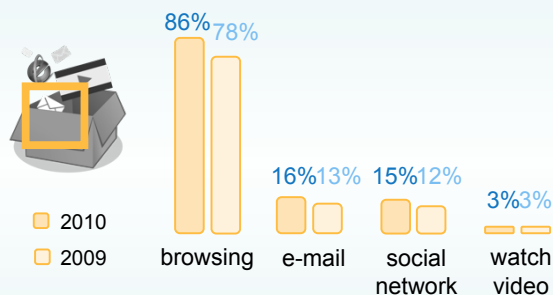
*Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+*

With 43% reach on mobile subscribers and a 34% yearly growth, the UK mobile media market is paving the way for the crucial expansion of mobile advertising turnover.

The gender split of the mobile internet users in the UK is currently almost 60:40 male: female, with the under 35 age group accounting for a large share of the users.

Mobile internet activities

Frequency: at least once weekly

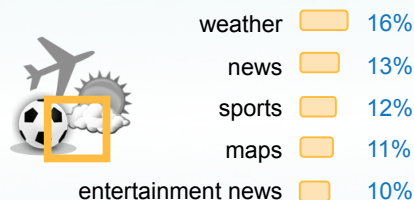


*Comscore Mobilens 3 months average ended July 2010/2009
base: mobile internet users 13+*

The dominant mobile internet activity in the UK is browsing at 86%. Email follows at 16%, then social networking and video. The biggest yearly growth can be observed within browsing.

Mobile internet: top 5 content categories

Frequency: at least once weekly



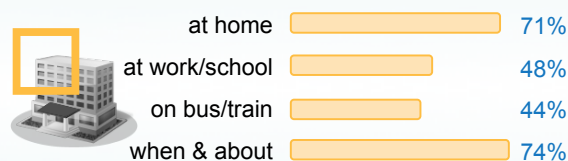
Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

The top mobile internet function accessed in the UK is weather, followed by news, sports, maps and entertainment news.

Place of connection

Mobile internet in the UK is primarily accessed when out and about, followed by home, work/school, and on public transport.

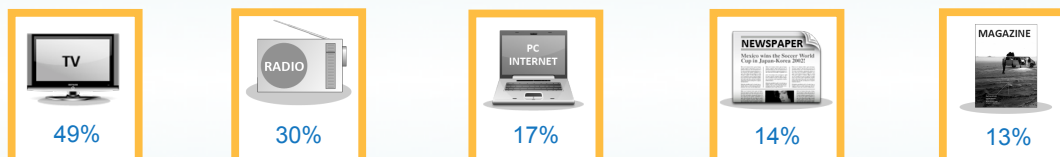
At least one usage of mobile media



Mobile Exposure 2010, base: mobile media users 16+

Media mesh with mobile internet

When you're mainly using the internet on your mobile phone, which other media do you sometimes use?



EIAA Mediascope Europe 2010, base: mobile internet users 16+

When they media mesh, UK mobile internet users primarily watch TV or listen to the radio.

Mobile Advertising



received SMS ad 39%

Comscore Mobilens 3 months average ended July 2010
base: mobile internet users 13+

interested in mobile ad formats :
display, direct marketing, geolocalisation... 60%

Mobile Exposure 2010, base: mobile media users 16+

Six out of ten UK mobile internet users are interested in at least one mobile advertising format. 39% say they have already received an sms ad on their phone.

M-commerce

used mobile to pay / redeem / reserve

40%



Mobile Exposure 2010, base: mobile media users 16+

Four out of ten UK mobile internet user have used their mobile to either pay, redeem or reserve something.

Contributor

Ludovic Lévy

Director, Mobile Advertising, Orange-France Telecom Group
Member of MMA EMEA board and Chairman of the Mobile committee at IAB Europe

Ludovic Lévy has been working in the digital advertising arena since 1996. He began his career in France in 1996, working at Carat Interactive and moving onto to OMD in 1998 where he founded and managed OMD Digital. In 2001, he joined AdLINK Internet Media as the Marketing Director, and progressed to International Business Development Director. In 2008, Ludovic moved to Orange Advertising Network, in the role of International Marketing Director. Since September 2010 Ludovic has overseen the development of the mobile advertising revenue development across 33 countries.

About IAB Europe

Our mission is to promote, protect and prove the value of the European digital advertising industry.

IAB Europe exists to promote the growth of Europe's interactive advertising markets through events, partnerships and communications activity, to protect the interests of the industry through an active programme of public affairs and to prove the value of the market through research and education.

The power of IAB Europe comes from its extensive membership at both country and corporate levels. Our national membership of 26 countries spans the entire continent – not only the mature markets of Western Europe, but also rapidly evolving markets including Croatia, Czech Republic, Romania, Russia, Slovakia and Ukraine. Our corporate membership includes advertisers, major media groups, publishers and portals, agencies, research companies and technology and service providers.

The only body that truly represents the interests of the European digital and interactive advertising industry.



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