

CONNECTED EUROPE







How smartphones and tablets are shifting
media consumption



Telefonica

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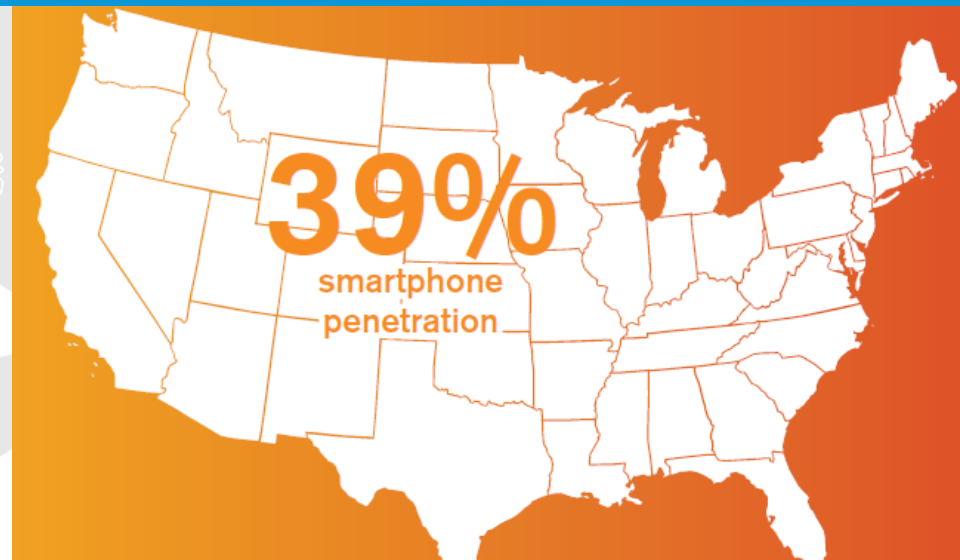
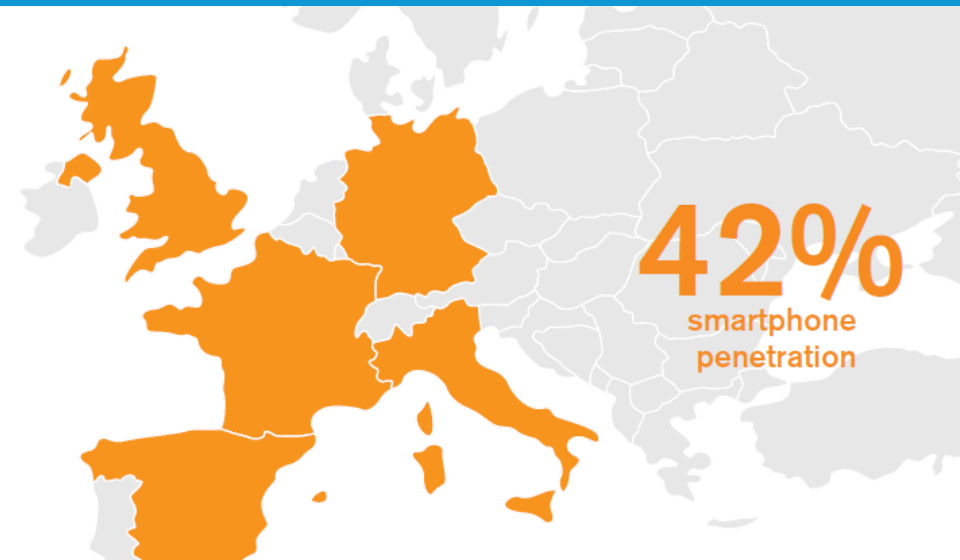
Cross-platform consumption has created a vastly different landscape...

-  **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

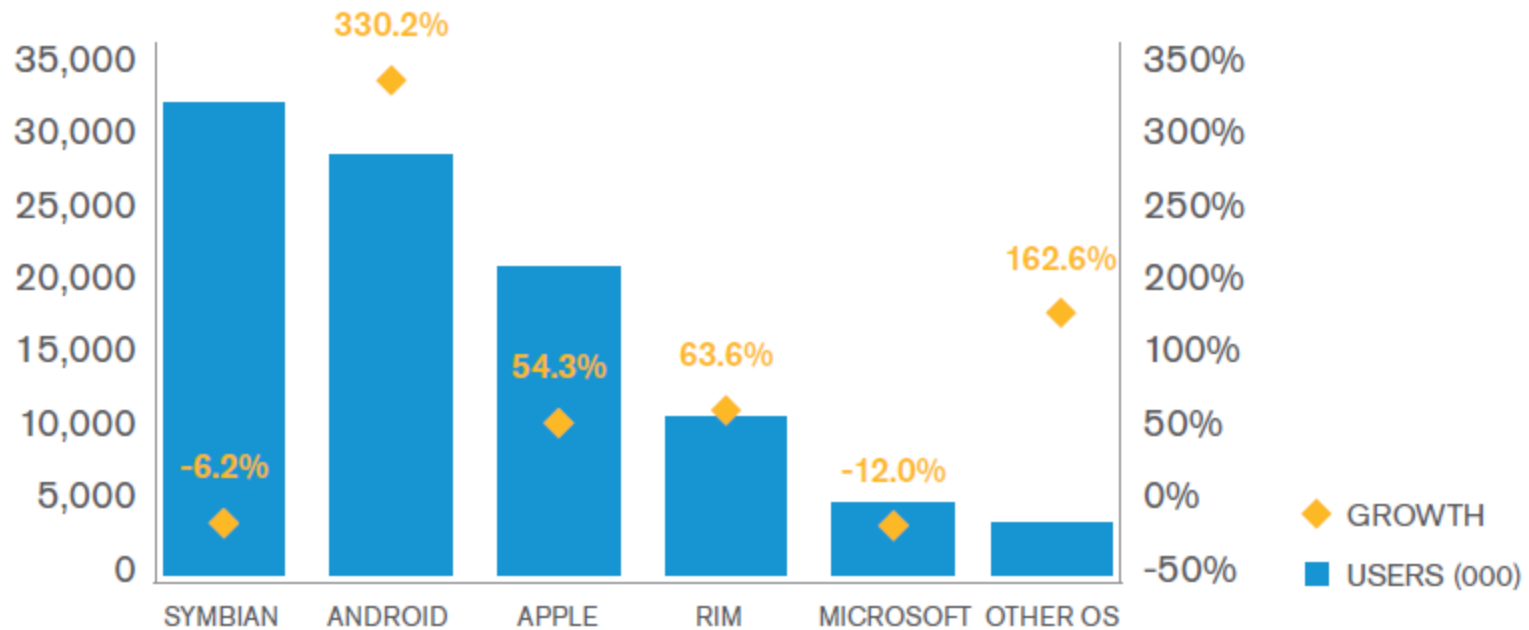
EU5 LEADS THE US



ANDROID GOES MAINSTREAM

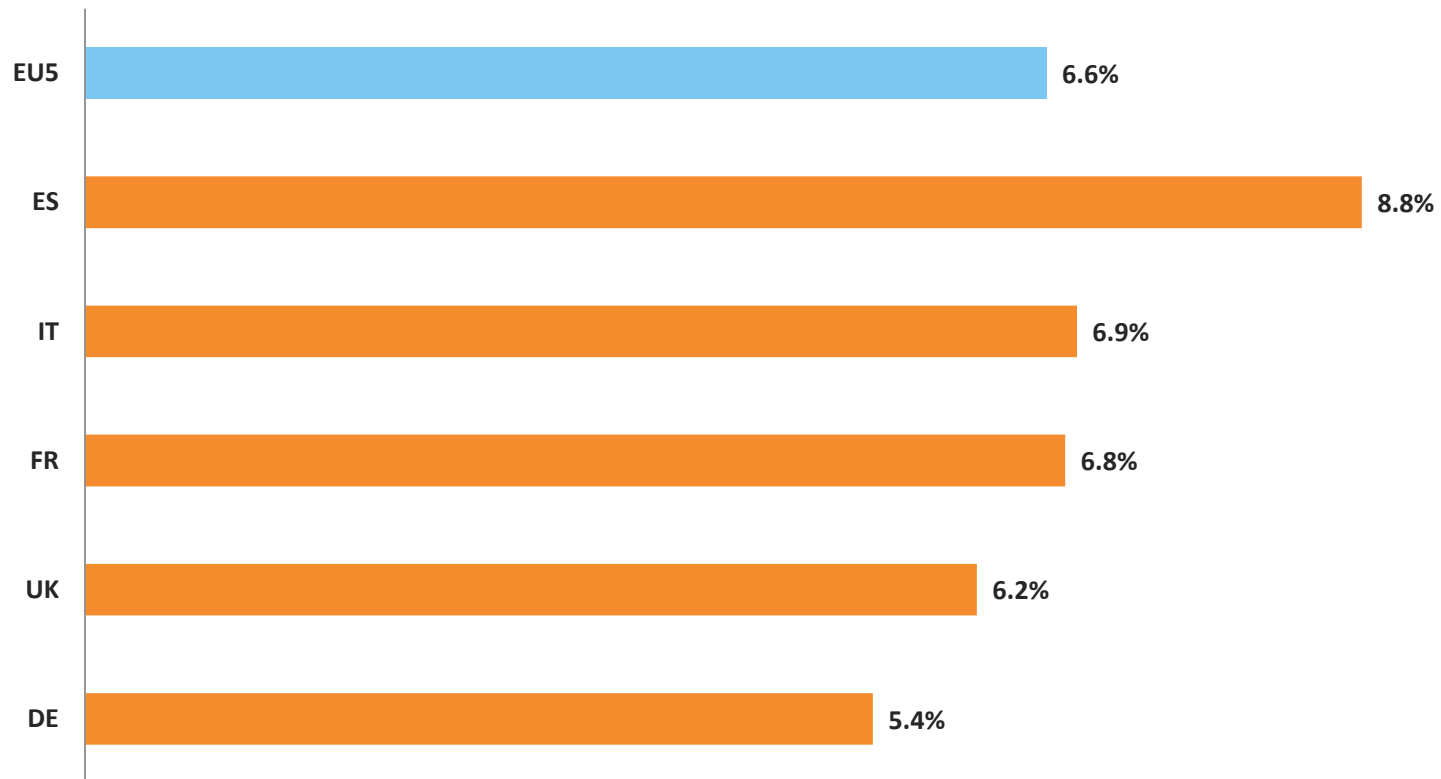
Smartphone Operating Systems

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



TABLETS NOT JUST FOR MOBILE USERS

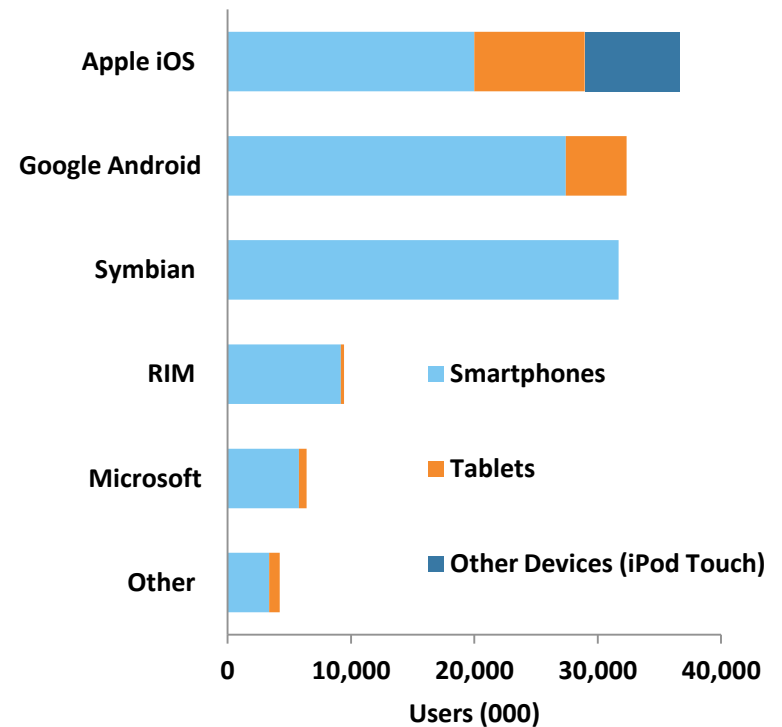
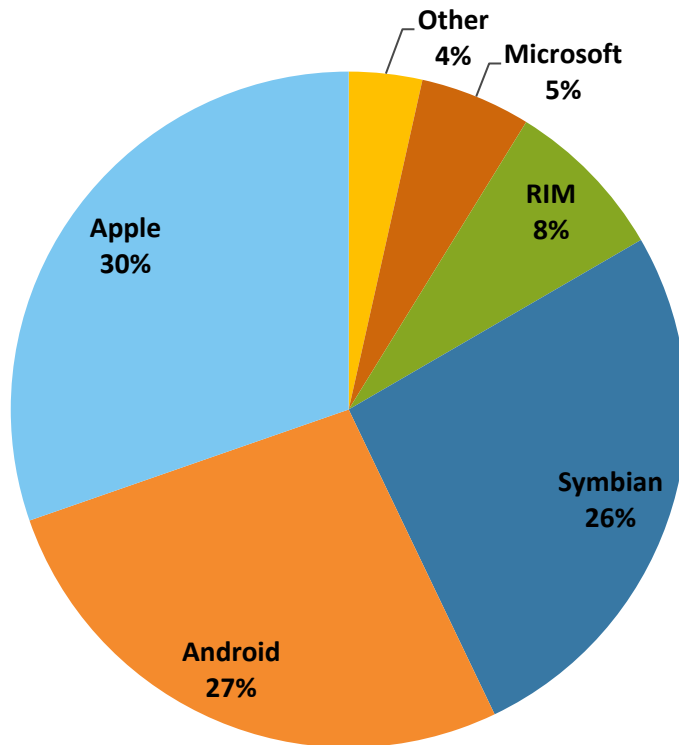
Percent of Mobile Owners That Also Own Tablet
Source: comScore MobiLens, 3 mon. avg. ending Oct 2011



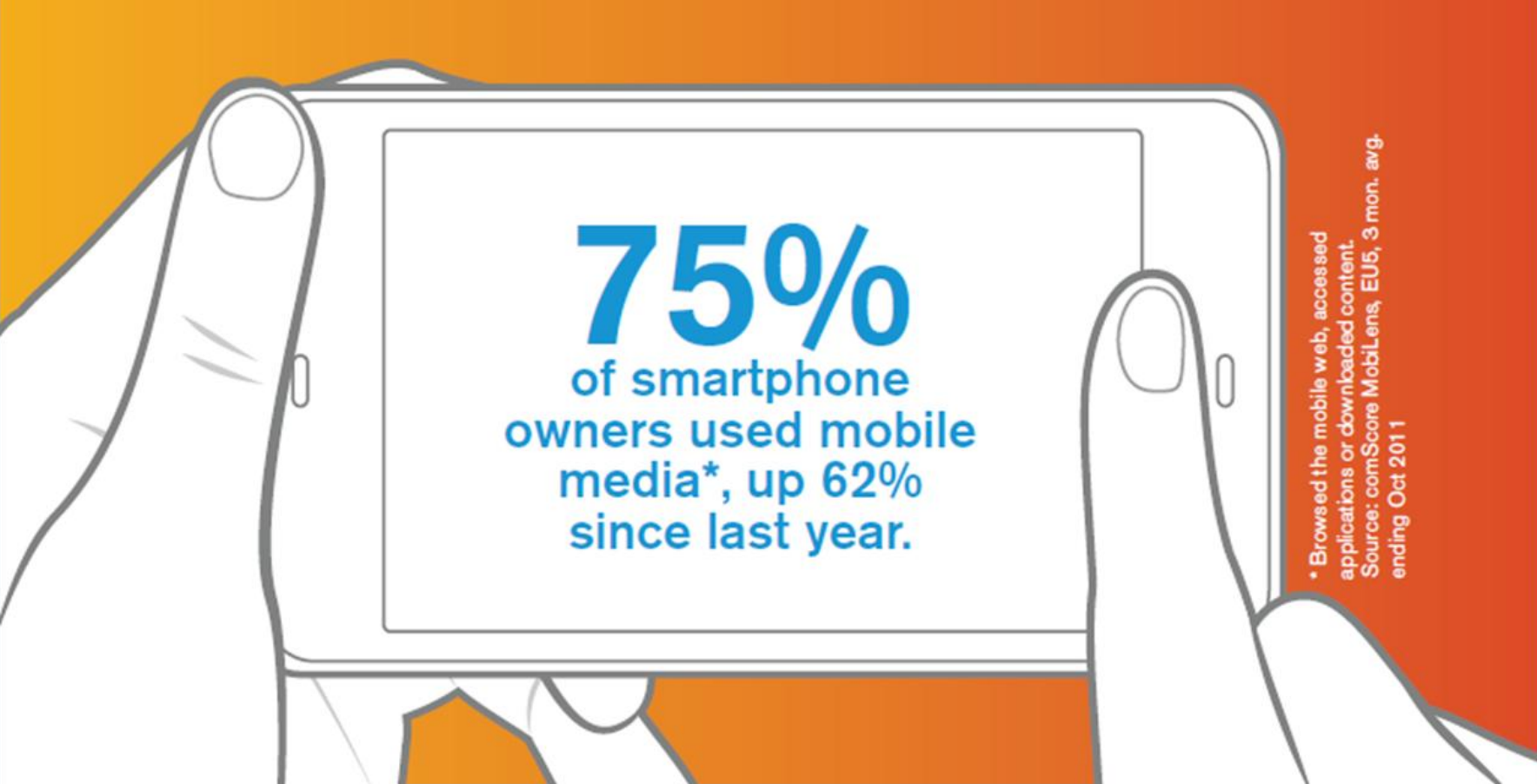
APPLE ECOSYSTEM TAKES TOP SPOT FOR TOTAL DEVICES IN USE

OS Market Share Audience

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



MOBILE MEDIA CONSUMPTION ON THE UP



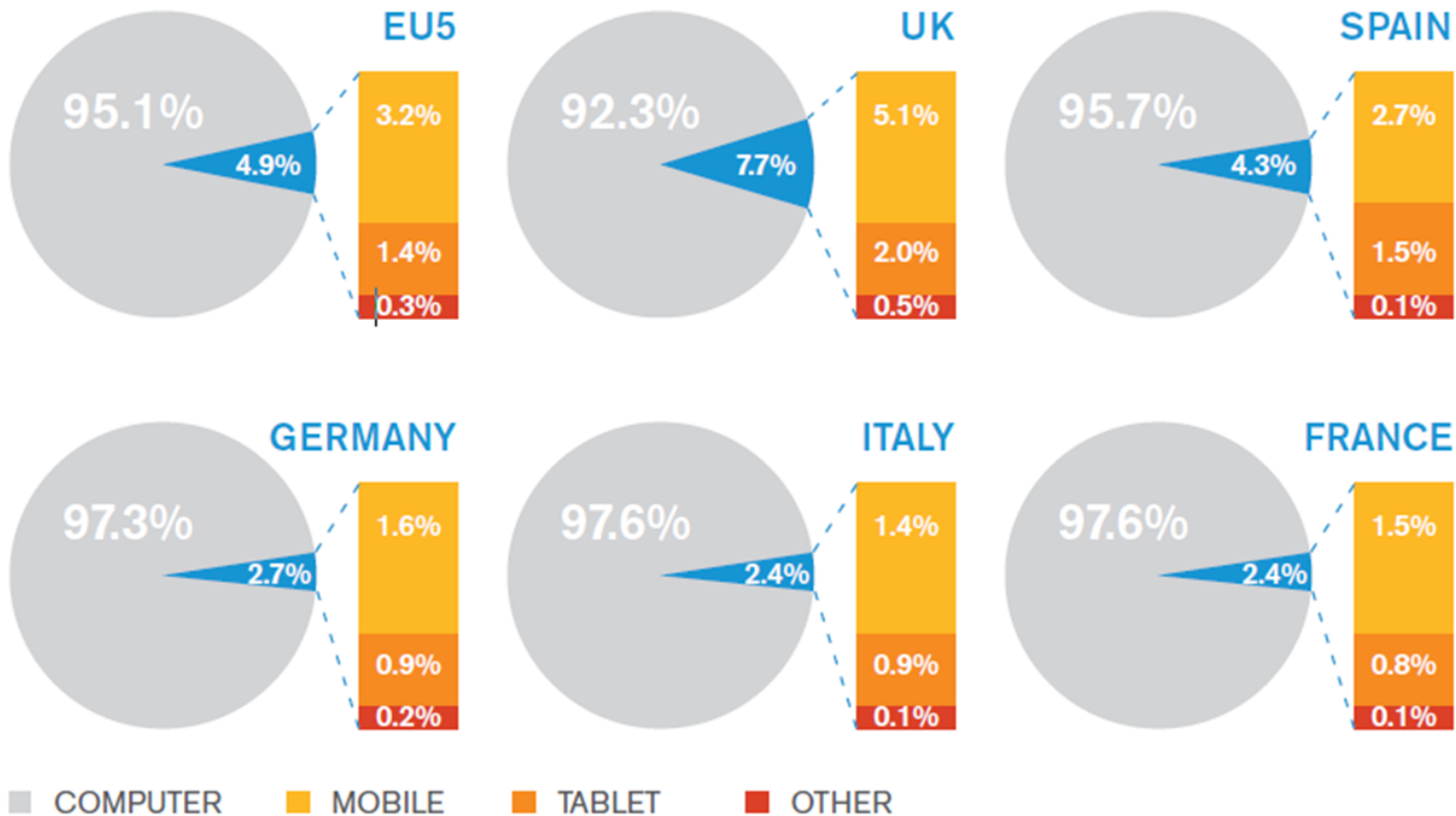
75%
of smartphone
owners used mobile
media*, up 62%
since last year.

* 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

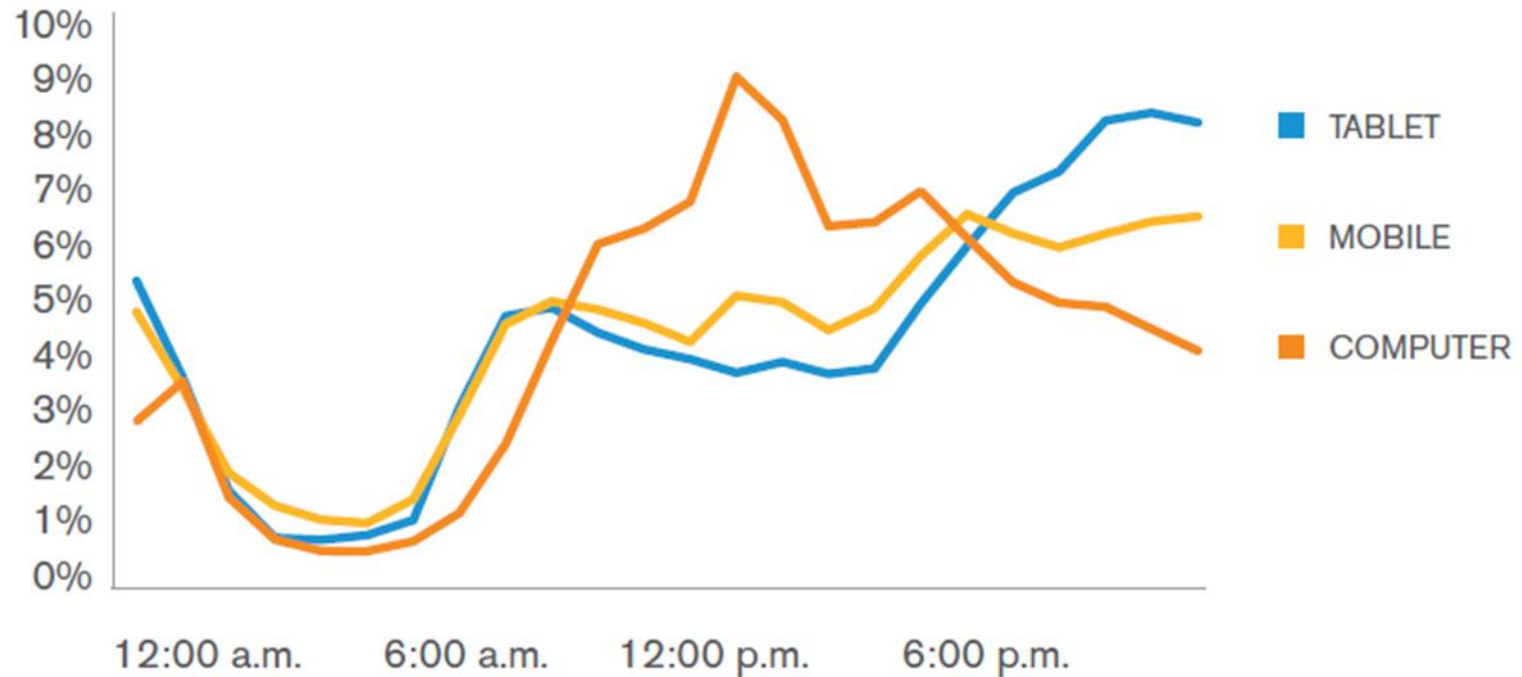


Connected devices are defined as tablets and other web-enabled devices, such as gaming consoles and media players.

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

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

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

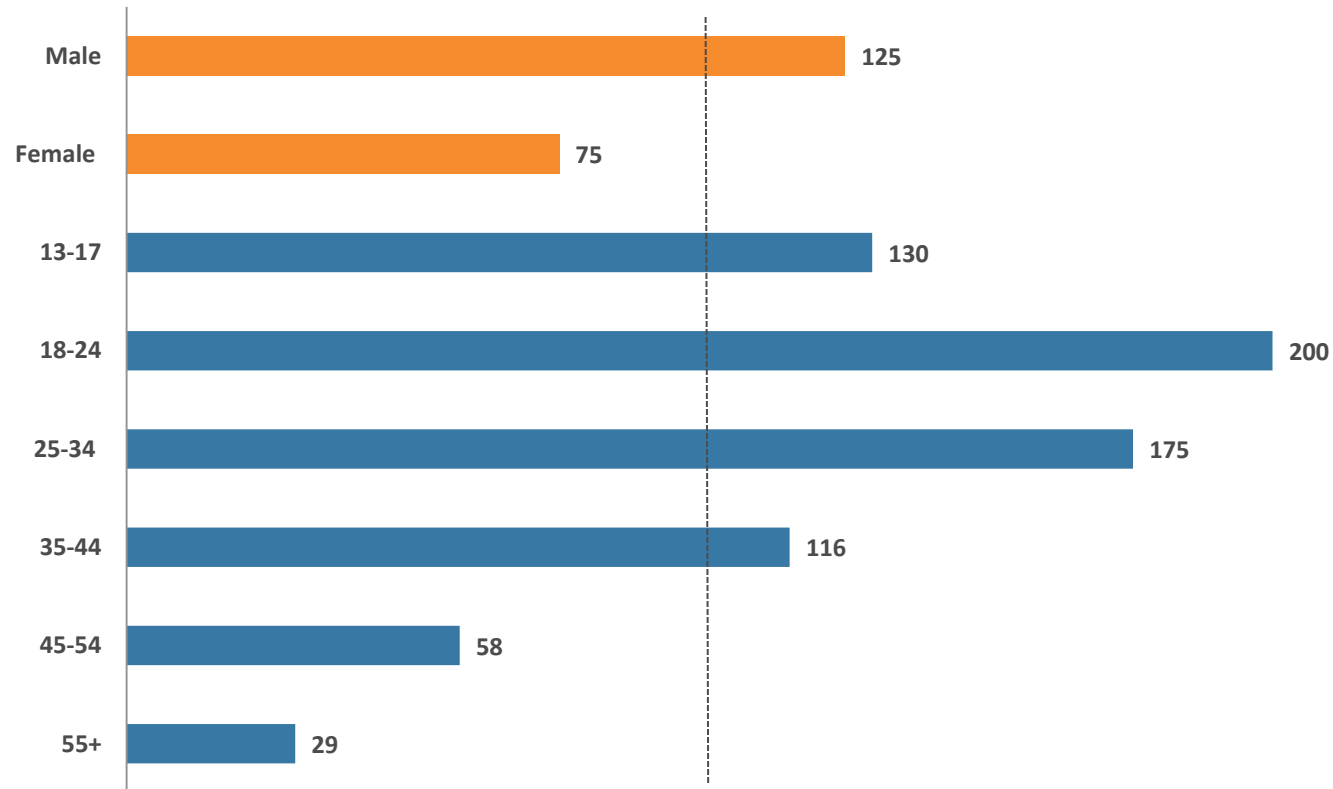
+112% since last year



Source: comScore MobileLens, 5 mos. avg. ending Oct 2011

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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