



The Impact of Connected Devices on Consumer Behaviour

A comparison of US and European mobile consumer behaviour

Gregor Smith, Enterprise Sales Director

Mobile World Congress | February 2013

comScore is a Leading Internet Technology Company That Provides Analytics for a Digital World™

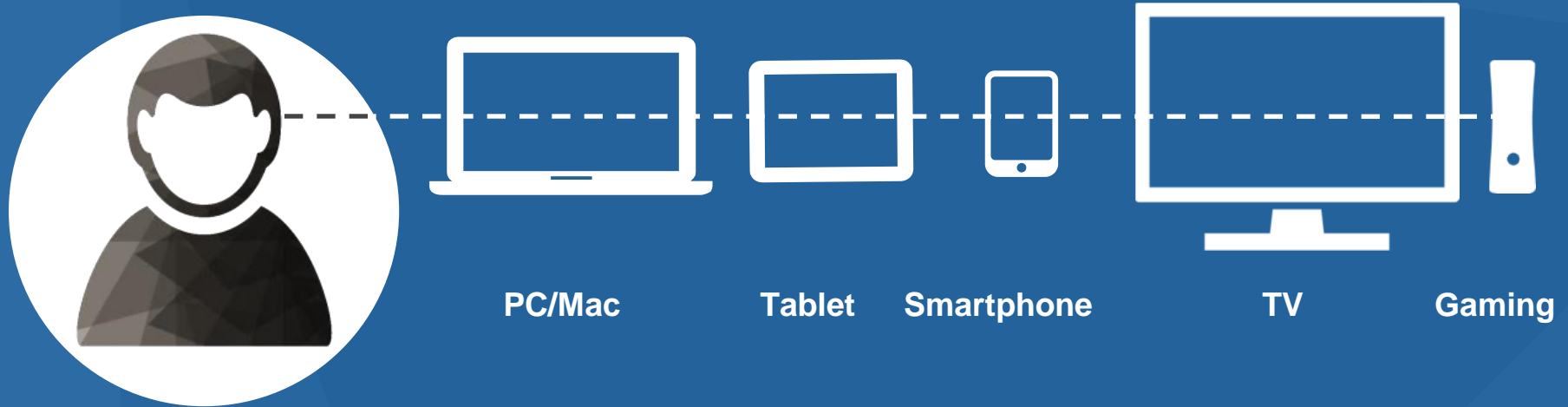
Audience
Analytics

Advertising
Analytics

Digital Business
Analytics

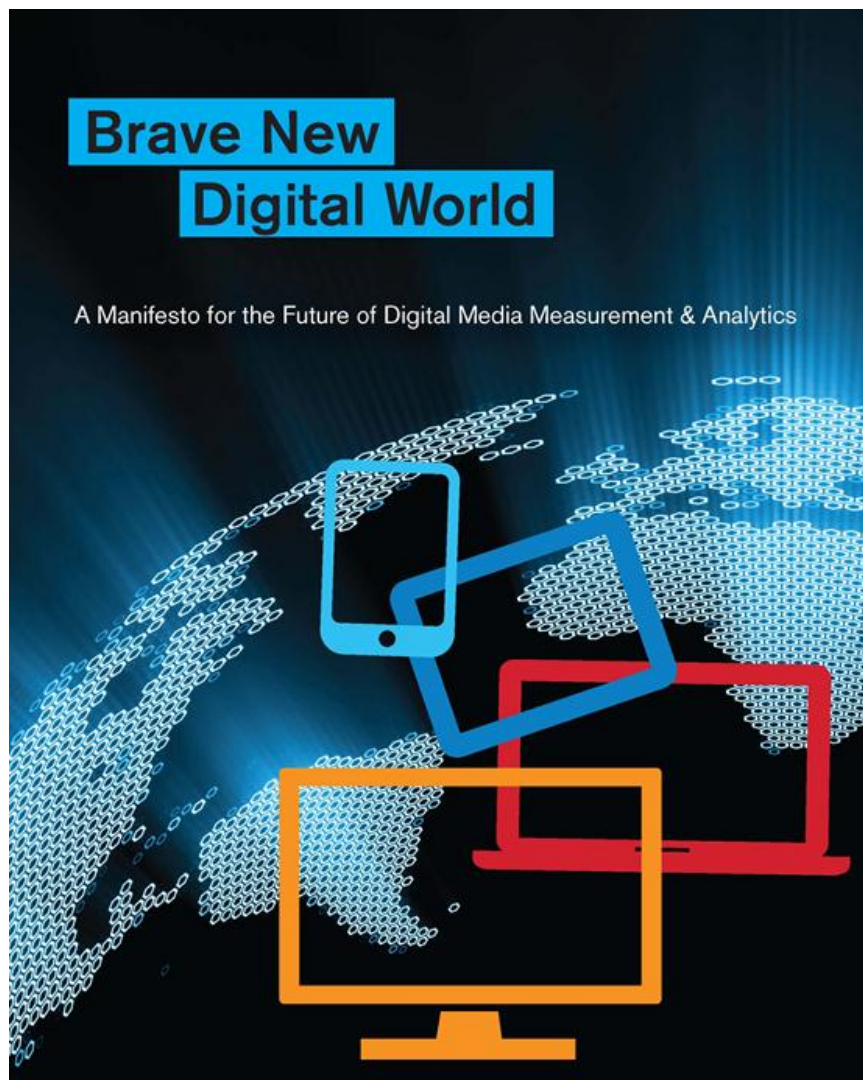
Mobile Operator
Analytics

Challenge of Today's Digital Consumer



- **Digital Omnivores accessing their digital world across multiple devices, in different ways across each day**
- **Understanding the person—not just device traffic—is key**

comScore Meets the Multi-Platform Challenge



MMX Multi-Platform

- Beta Available in US and UK
- Official partner for digital audience measurement in UK via UKOM

Unduplicated Digital Audience

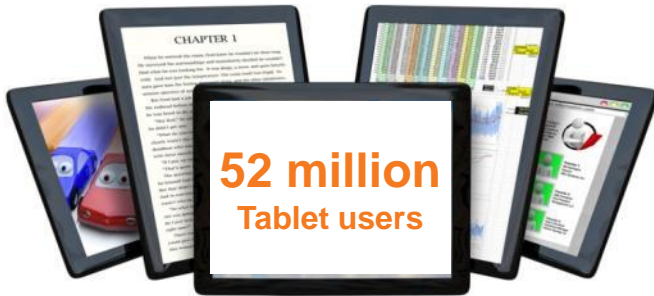
- PC
- Smartphones
- Tablets

MMX Multi-Platform: US Findings

So, how big is Your Total, Unduplicated Audience?

Average
Incremental Reach
Amongst Top 30:

26%



Unduplicated
235
Million



MMX Multi-Platform: UK Findings

So, how big is Your Total, Unduplicated Audience?

Average
Incremental Reach
Amongst Top 20:

10%

Unduplicated

**47
million**

29 million
Mobile users

45 million
PC users

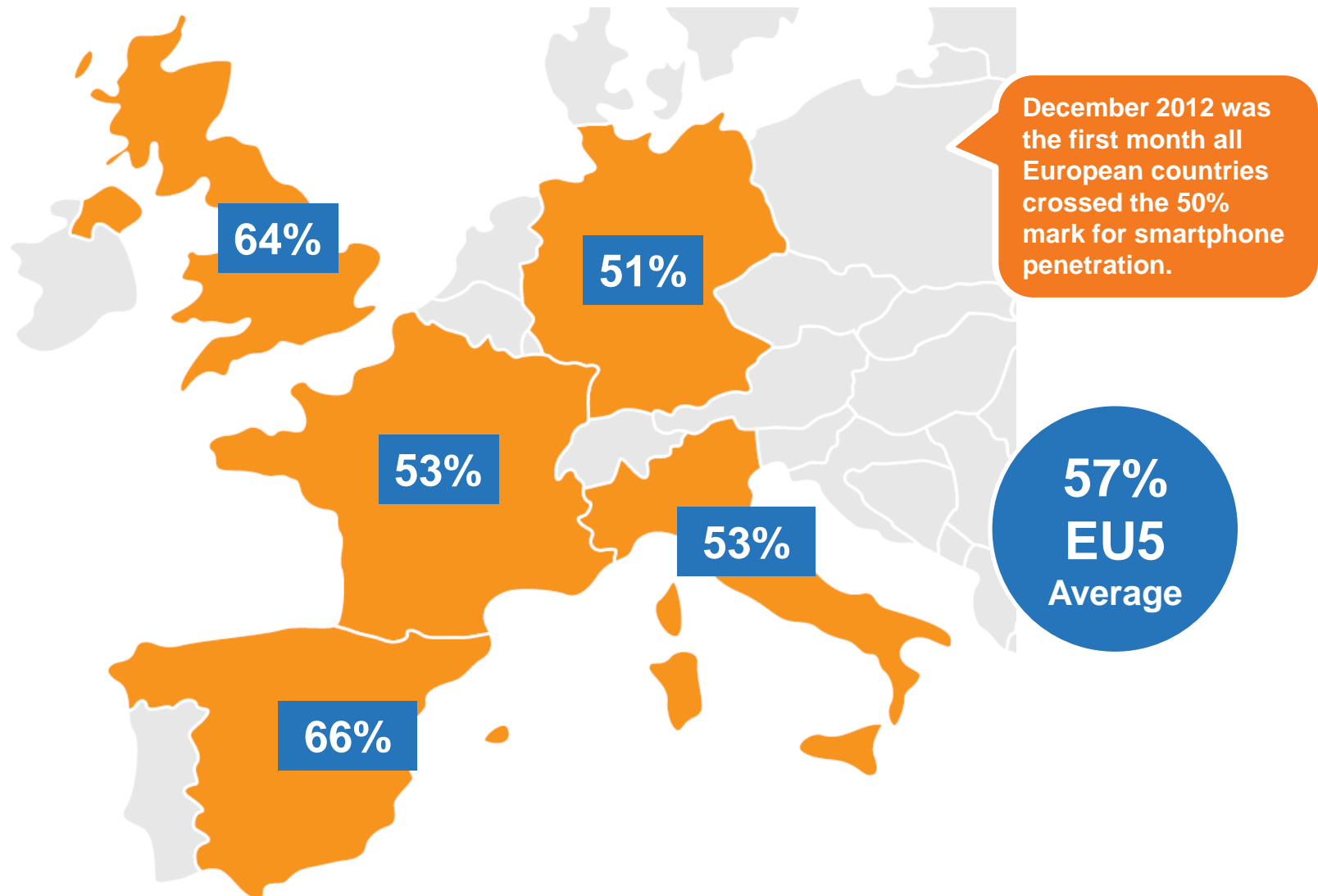


Understanding the Connected Consumer

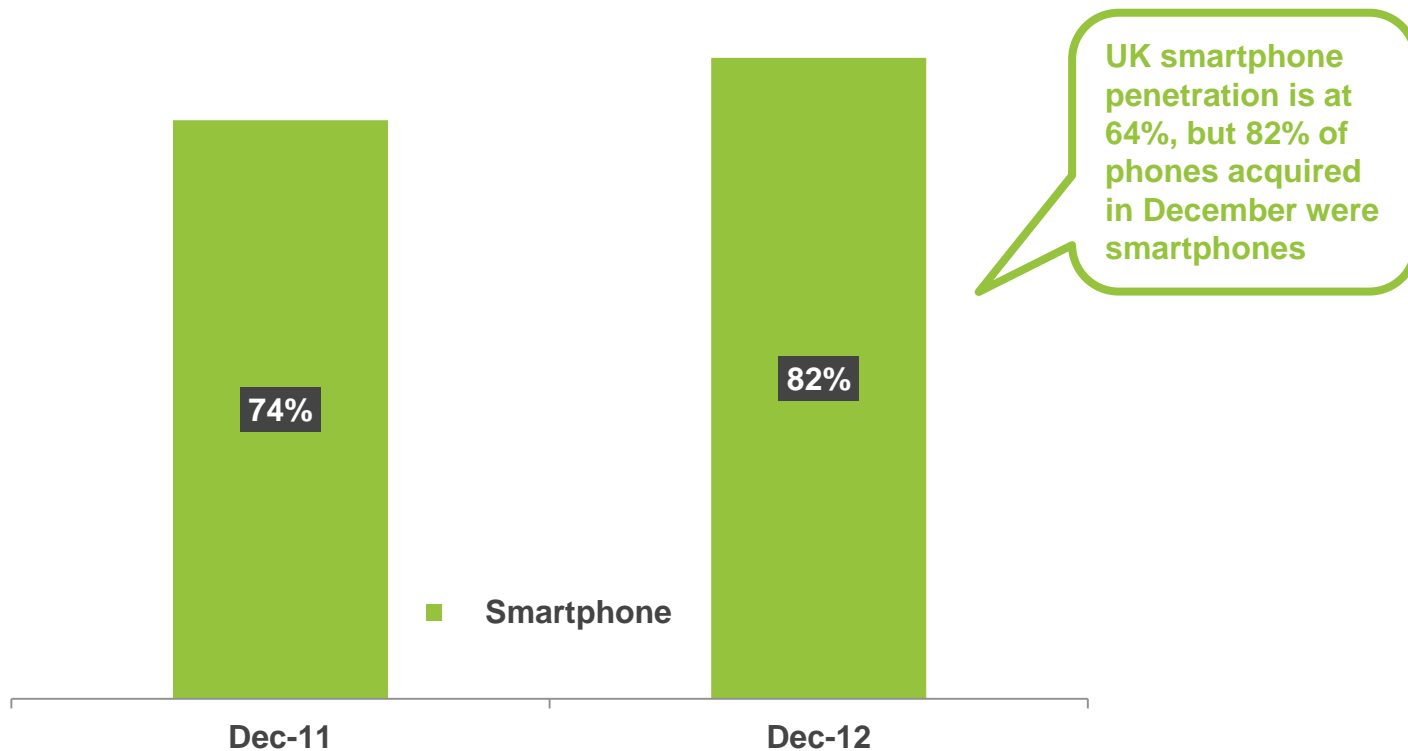
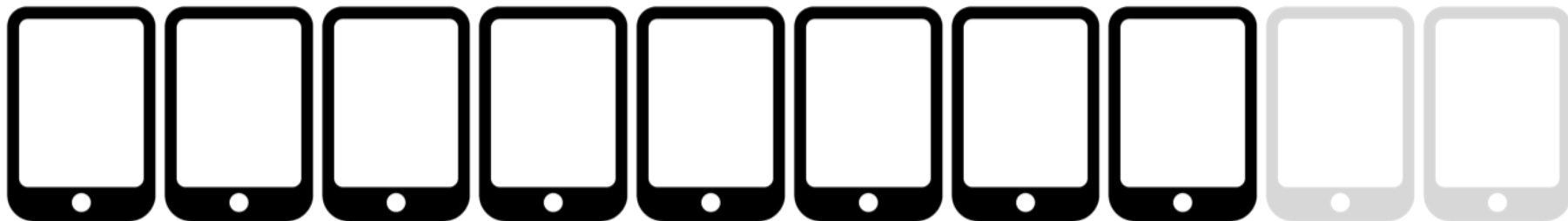
- **The Smartphone Majority Has Arrived**
- **Android + iOS Dominate US & EU**
- **Multi-device / Multi-platform is the New Normal**
- **High-Speed, Ubiquitous Connectivity Has Unleashed Mobile Content Consumption**
- **App Usage Dominates Mobile Web**
- **Mobile is Disrupting the Home and Changing How We Shop**

Smartphone Penetration in EU5 at 57%

64% of UK Mobile Owners Use a Smartphone



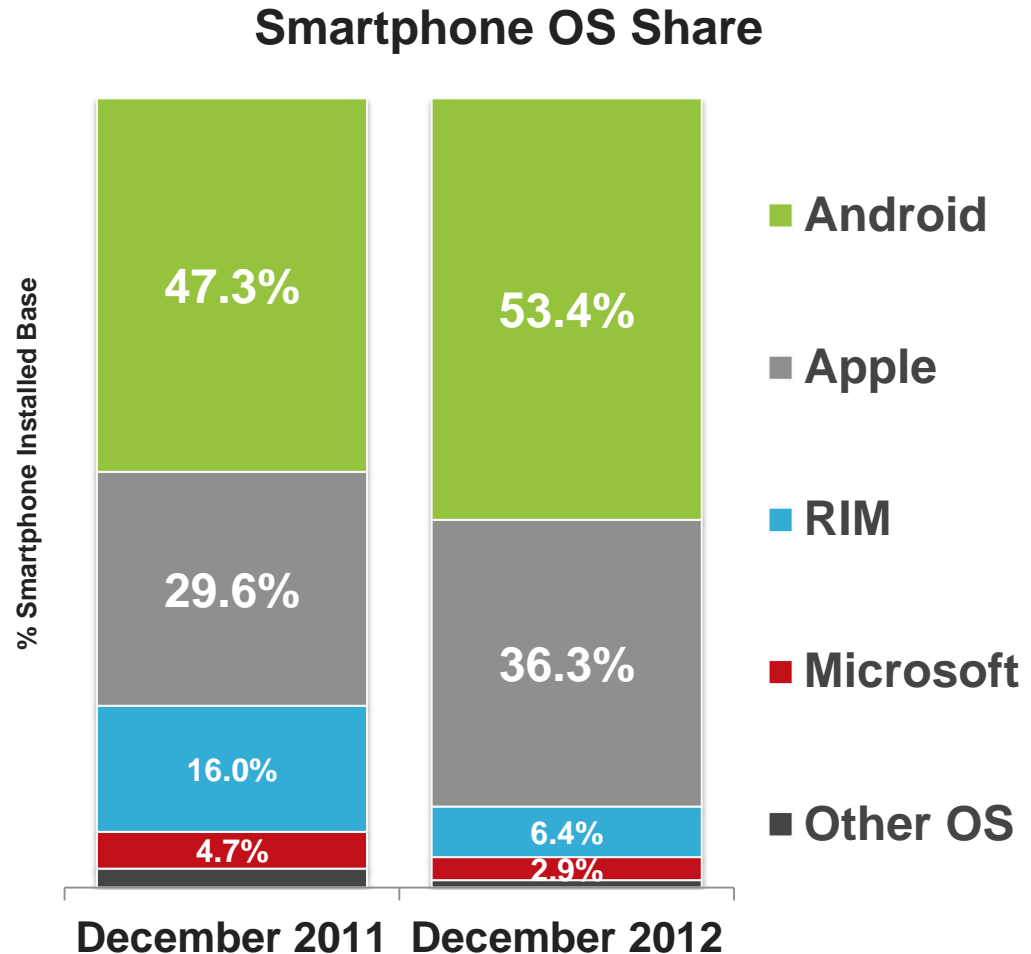
8 in 10 Newly Acquired Devices are Smartphones



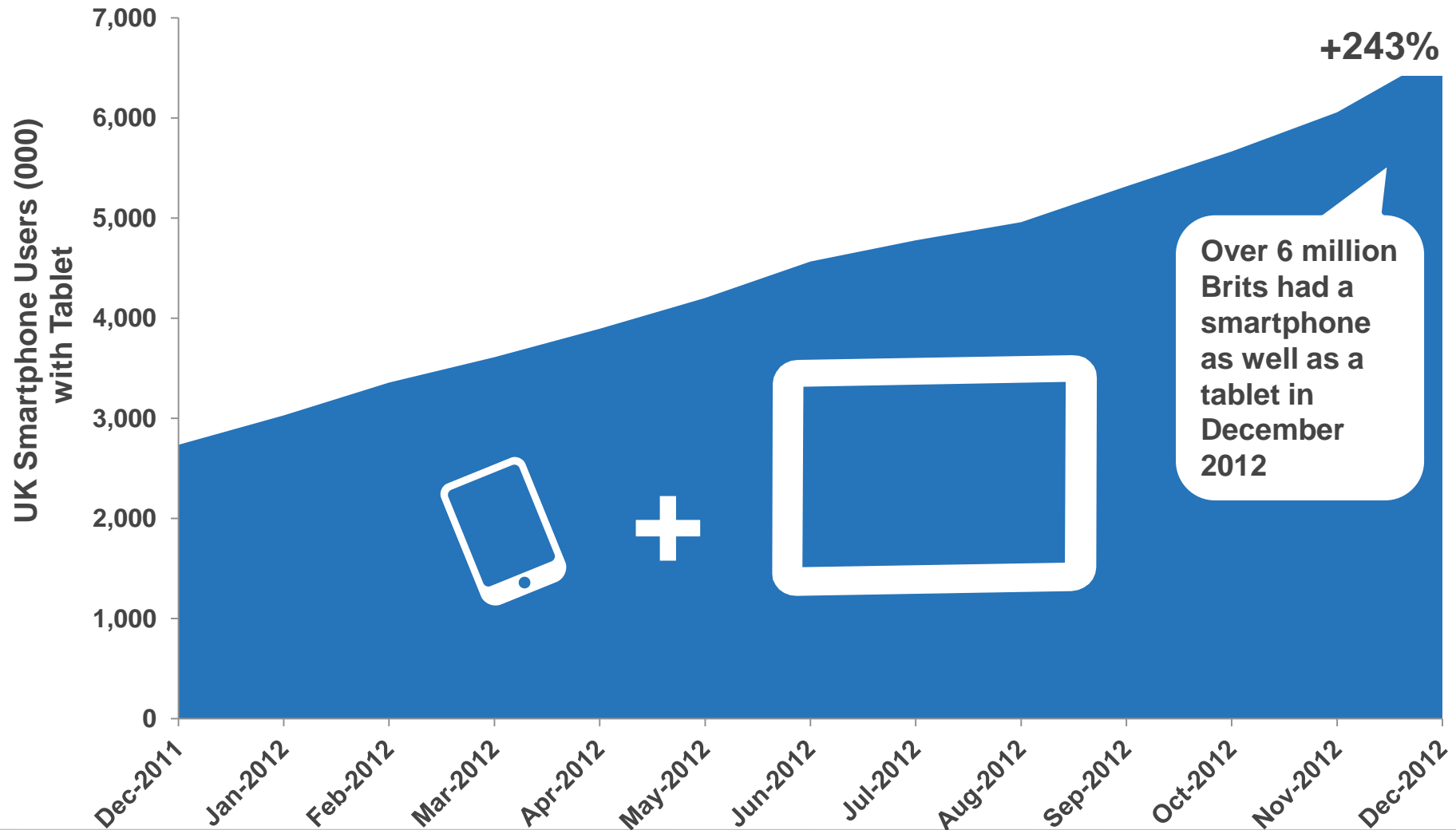
US Joined Smartphone Majority in 2012

64% of UK Mobile Owners Use a Smartphone

- **Android** and **iPhone** account for nearly 90% of US smartphones
- **Blackberry** and **Microsoft** continue to lose share



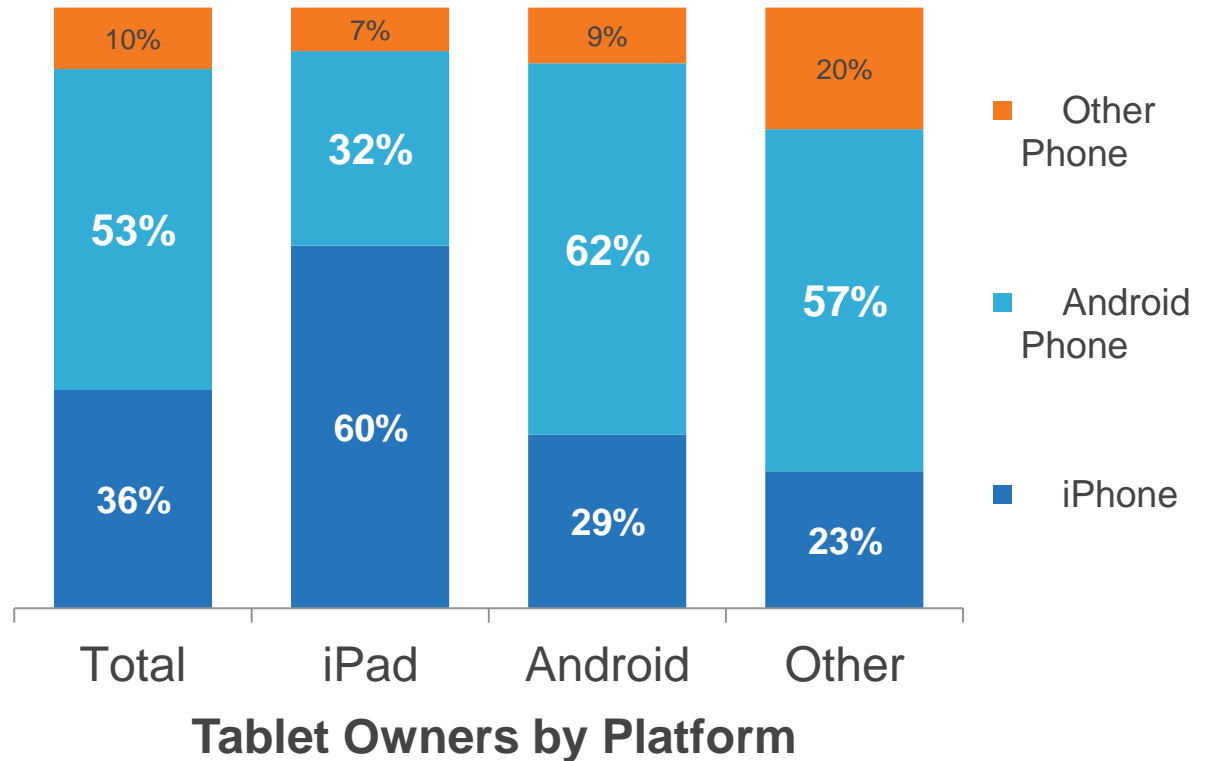
Rapid Rise of Smartphone + Tablets Ownership



Consumers are Cross-device *and* Cross-Platform

Publishers and advertisers must reach across device types and across platforms to stay connected with their audience.

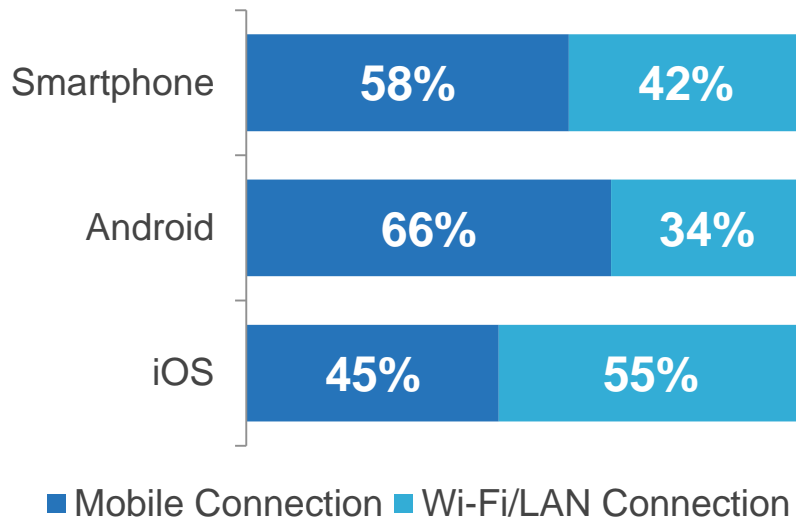
Percentage of Tablet Users by Platform Who Use Smartphone Platforms, US



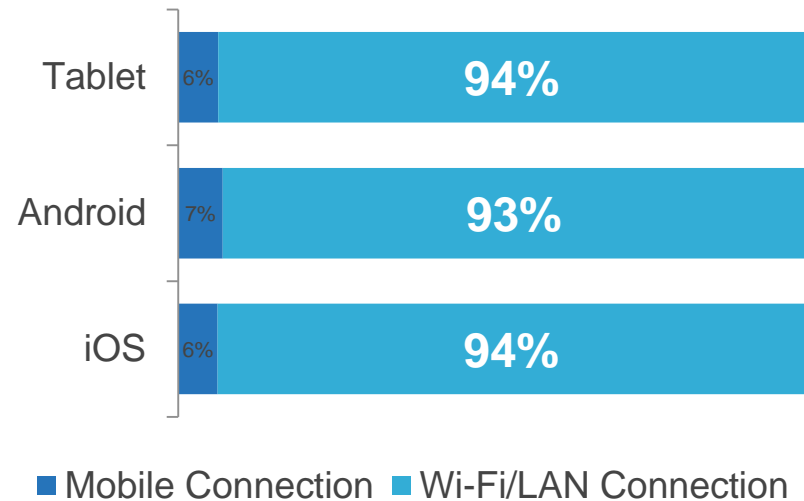
Fast, Ubiquitous Wireless Networks Drive Mobile Usage

In U.S., *Wi-Fi provides majority of device connection time*

Smartphones Connection Activity, U.S.

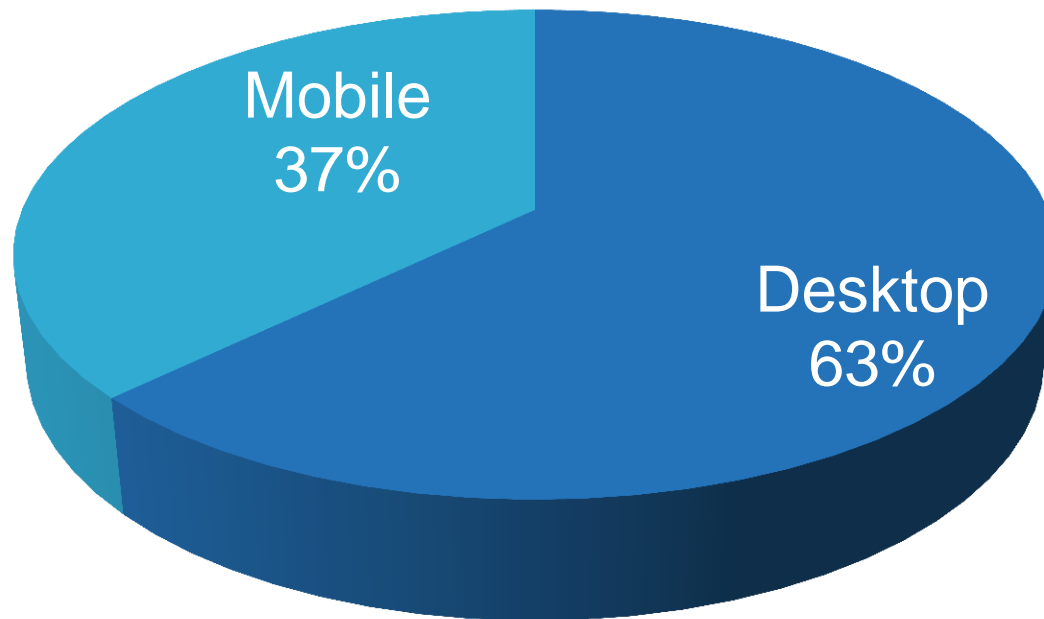


Tablet Connection Activity, U.S.



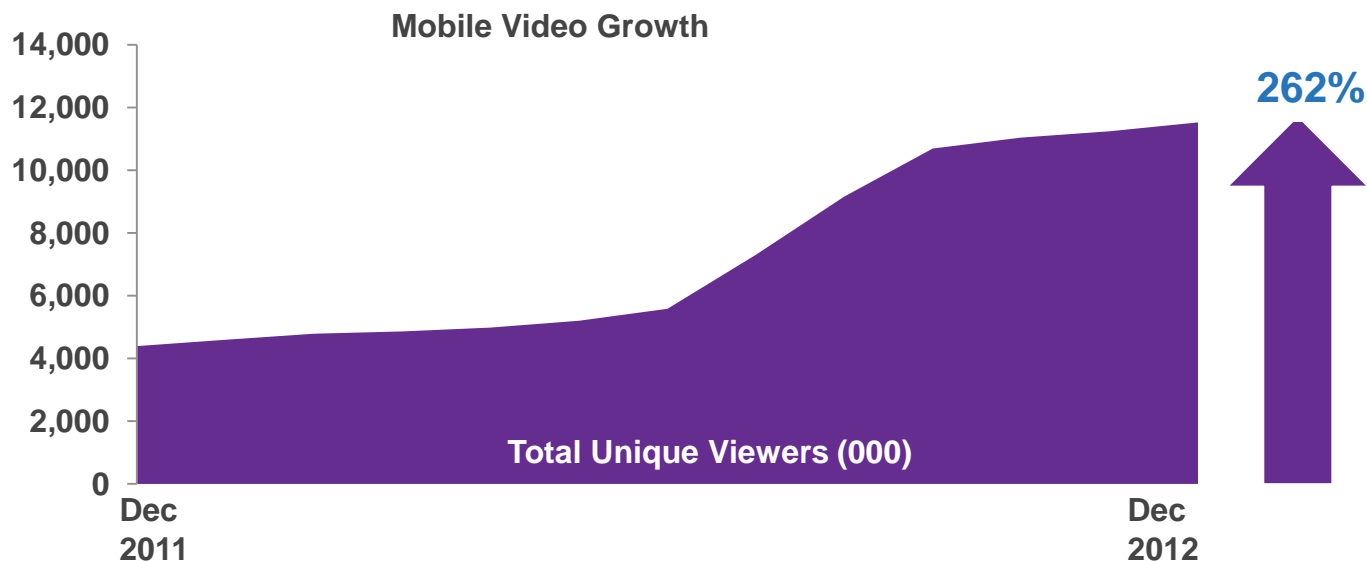
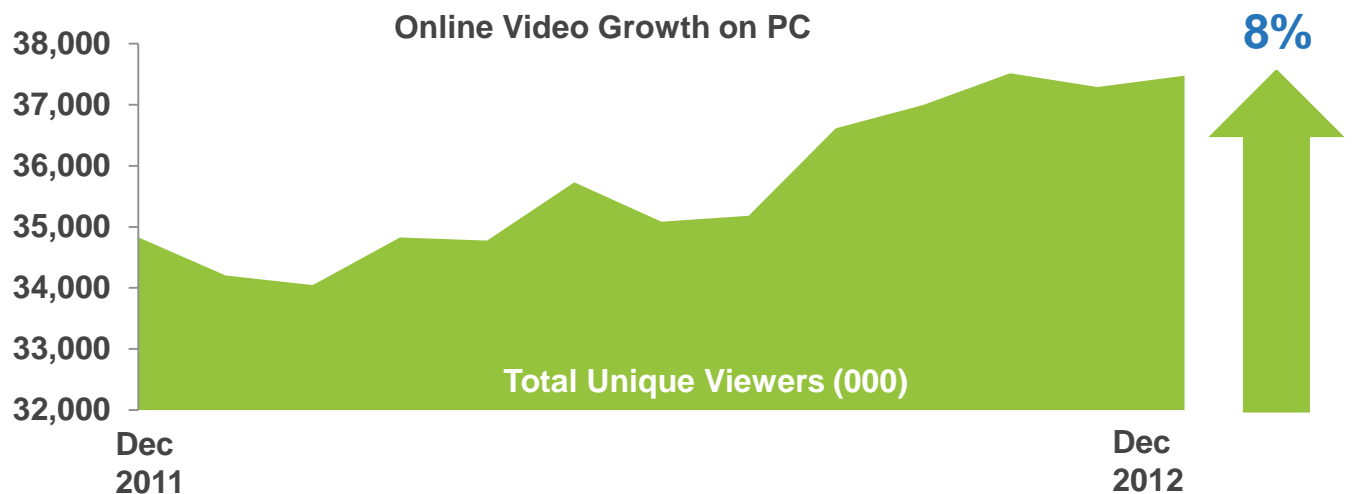
Mobile Accounts for 37% of Time Spent Online is U.S.

Share of Digital Media Time Spent: Desktop Computer vs. Mobile (Smartphone + Tablet)

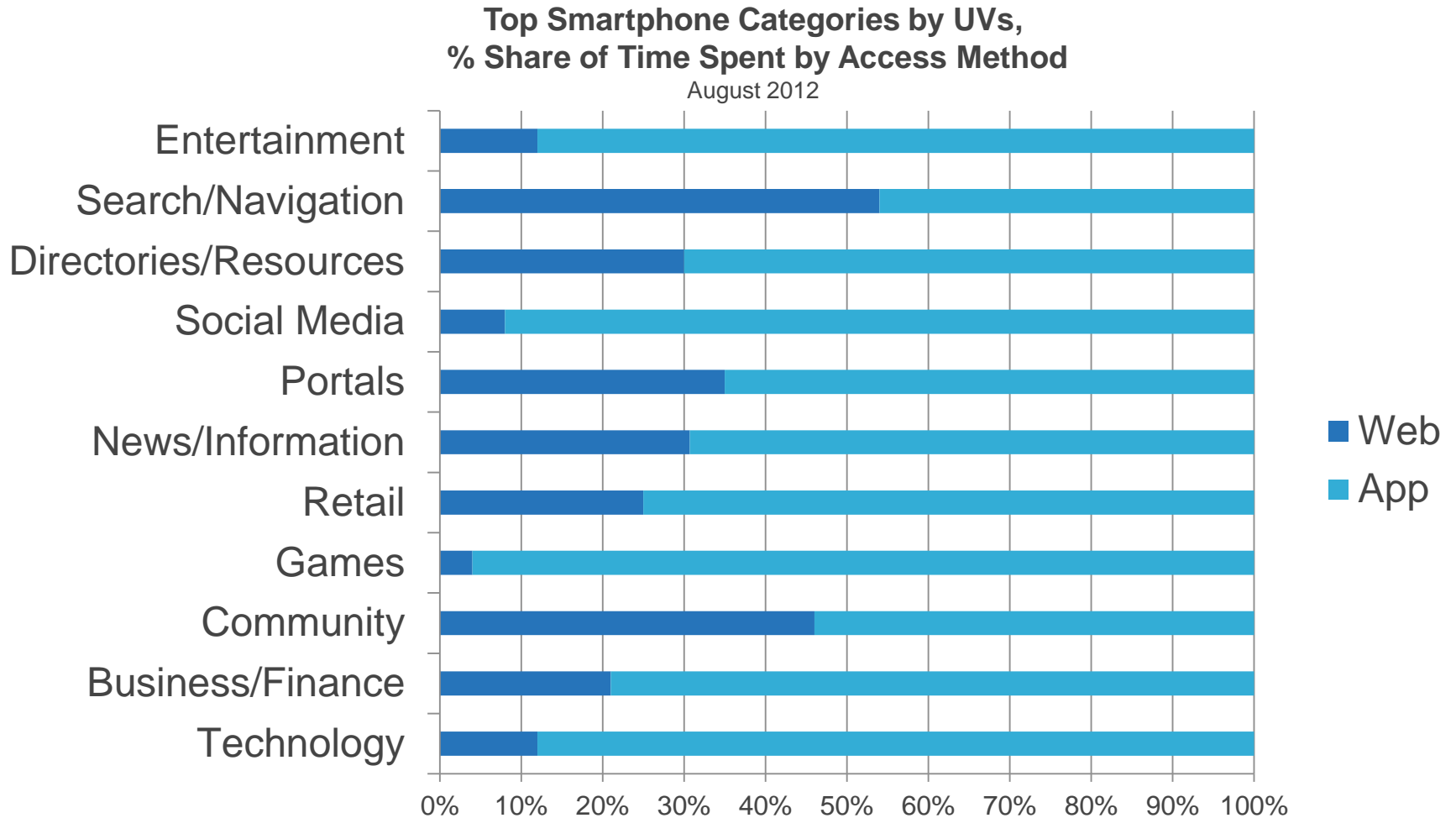


Mobile Connectivity Driving Digital Content Consumption

Mobile video audience increasing significantly faster than on PC



Apps Dominate Time Spent in Most Categories

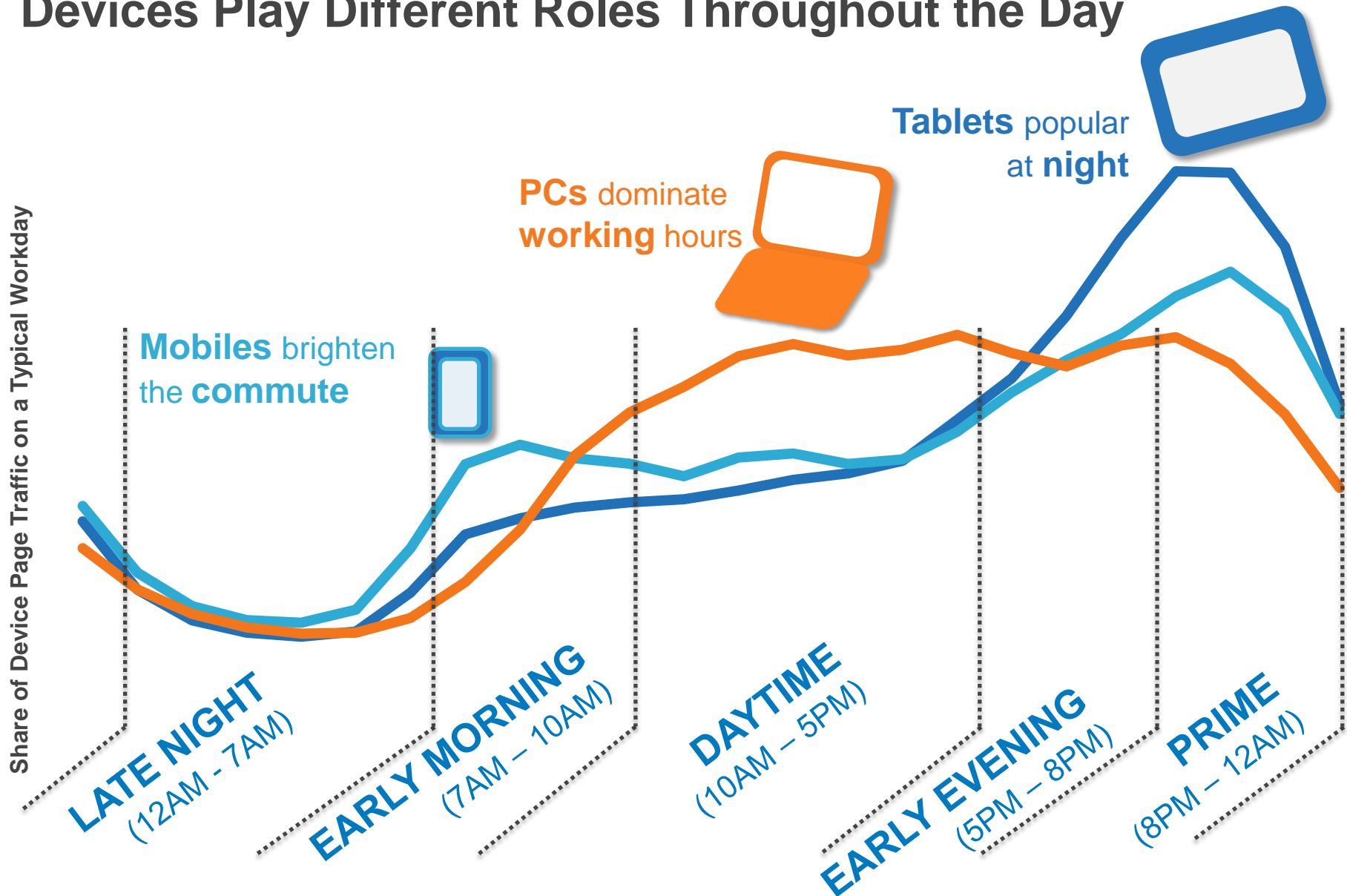


Mobile Provides Significant Incremental Audience Increase

Top 25 Digital Properties by Digital Population (000)
Source: comScore Media Metrix Multi-Platform (Beta), U.S., Dec-2012

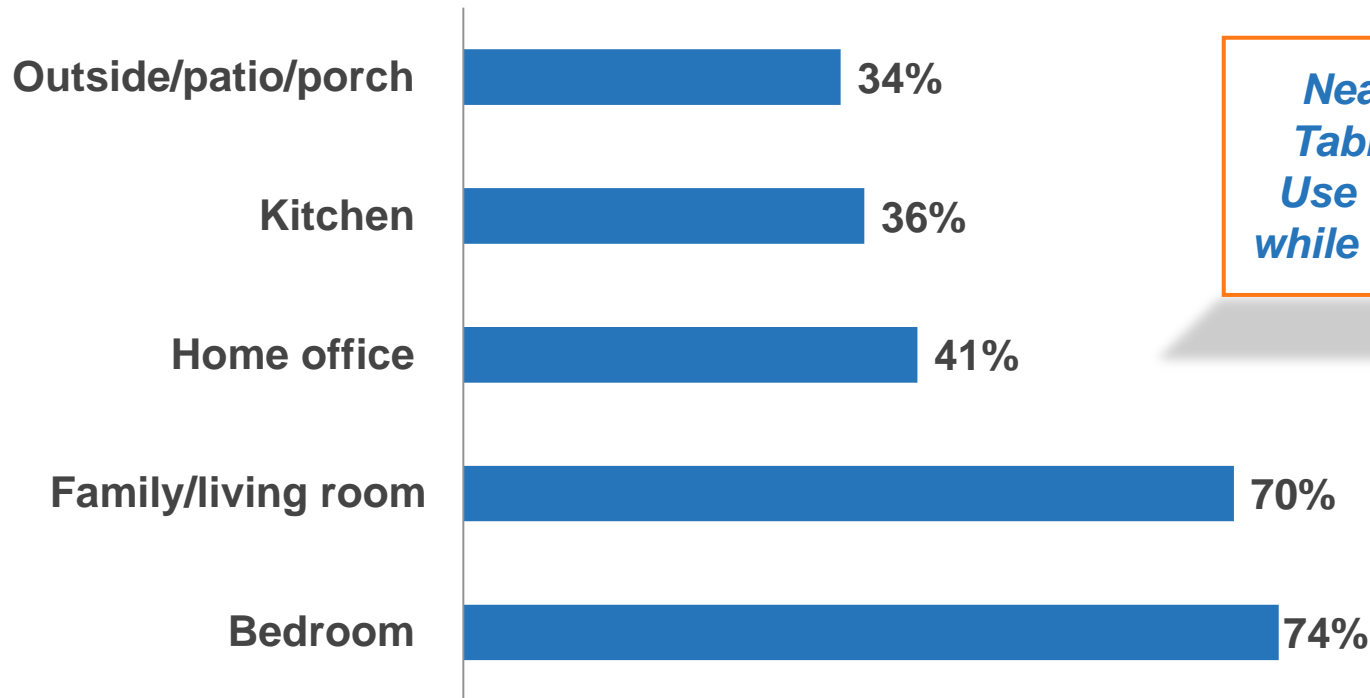
	Top 10 Digital Properties	Total Digital Population (000)	PC (000)	Mobile (000)	% Incremental Audience via Mobile
1	Google Sites	223,445	193,757	113,650	15%
2	Yahoo! Sites	206,830	185,847	92,218	11%
3	Facebook.com	185,335	150,294	97,739	23%
4	Microsoft Sites	178,737	170,947	55,190	5%
5	Amazon Sites	159,630	128,227	80,476	24%
6	AOL, Inc.	140,252	117,628	62,360	19%
7	Glam Media	128,317	110,555	50,428	16%
8	Ask Network	121,833	104,148	47,972	17%
9	Apple Inc.	108,580	83,722	51,548	30%
10	Turner Digital	104,897	85,666	44,675	22%

Devices Play Different Roles Throughout the Day



Tablets - Companions on the Sofa + in Bed in U.S. Homes

Location of Tablet Use at Home

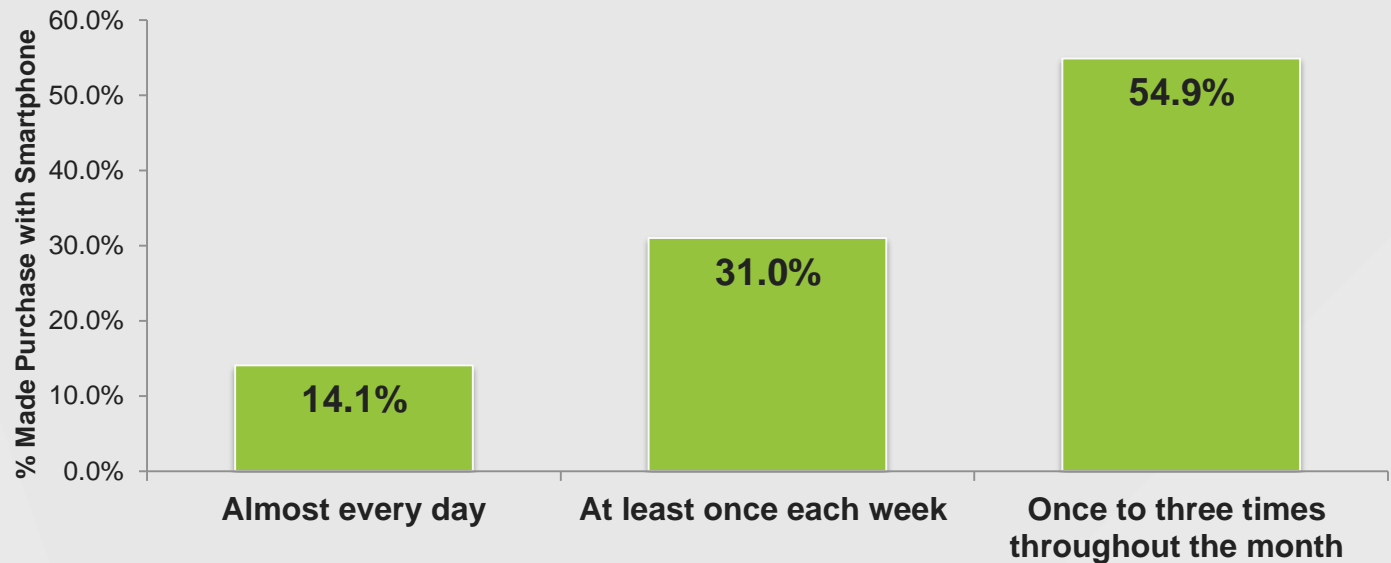


*Nearly half of
Tablet Owners
Use their Tablet
while watching TV*

Nearly 1 in 5 U.S. Smartphones Owners Buy On-Device



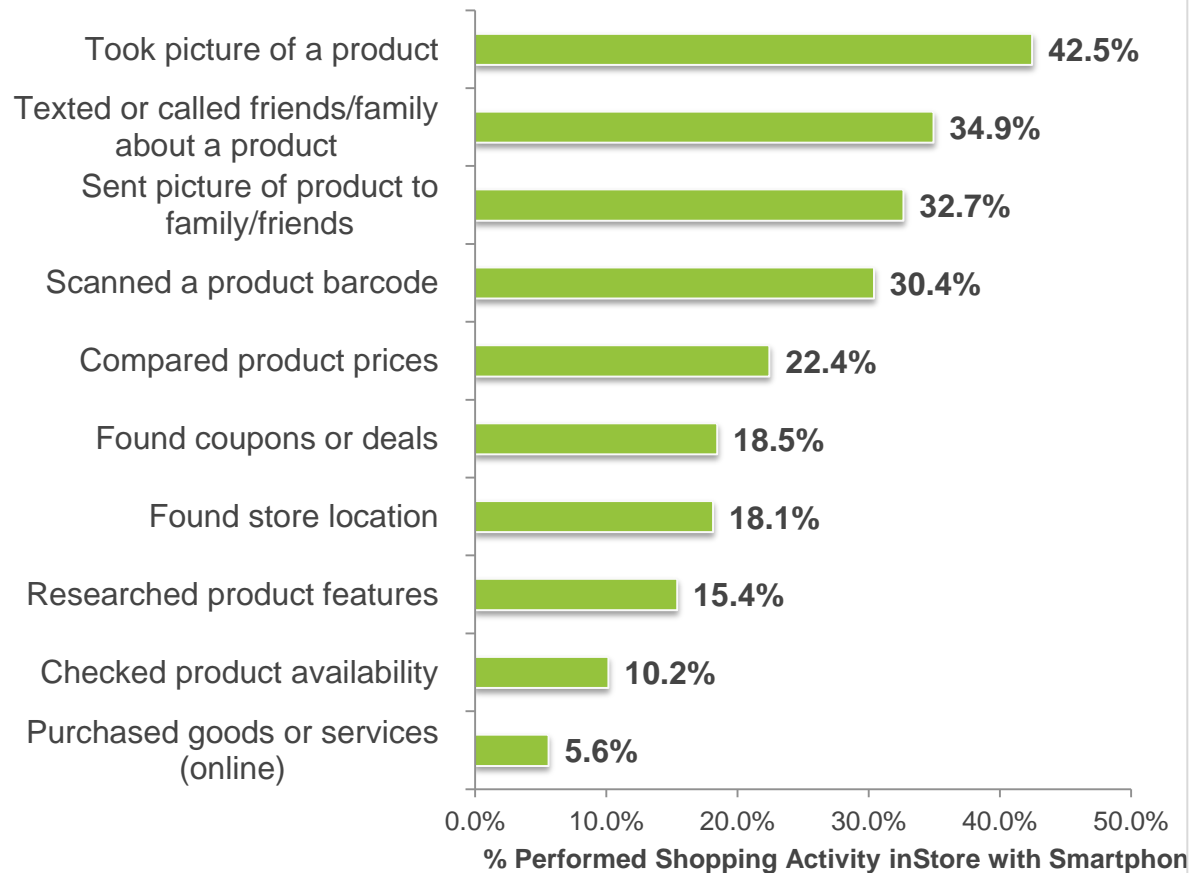
Frequency of On-Device Purchase



Smartphones Disrupt Brick & Mortar Retail



Activities Performed in Retail Store with Smartphone in U.S.



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Key Insights from 2012
for the Coming Year

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Key Insights from 2012 and What They Mean for the Coming Year

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Thank you!

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