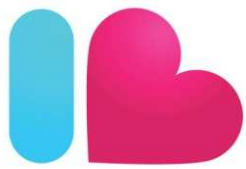


INTERACT
BARCELONA
2011

TOGETHER FOREVER?
ONLINE + TRADITIONAL MEDIA

1995

Internet media was born

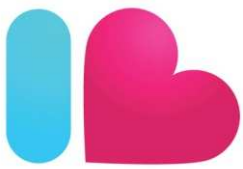


INTERACT
BARCELONA
2011

TOGETHER FOREVER?
ONLINE + TRADITIONAL MEDIA

2011

What's going on around mobile?



mobile eligible as a mass media



TV
households

1.5B



Personal
computers

0.9B



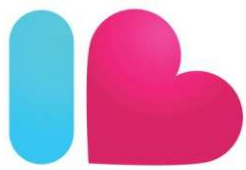
Internet
users

1.3B



Mobile
subscribers

5.1B

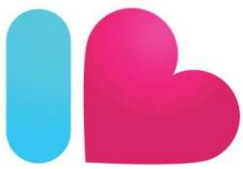


people love their mobiles

2x as many people would keep their mobile over TV

78% of people have their mobiles on at all the times

68 min – average time to report a lost mobile
(vs 26 hours for a wallet)



INTERACT
BARCELONA
2011

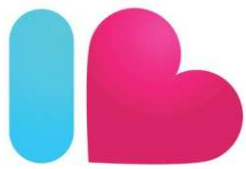
TOGETHER FOREVER?
ONLINE + TRADITIONAL MEDIA

IAB Europe mobile committee

market education
market insights
measurement guidelines
case studies
networking



Ludovic Levy
Chairman of mobile committee
Director of mobile advertising, Orange FT
Group



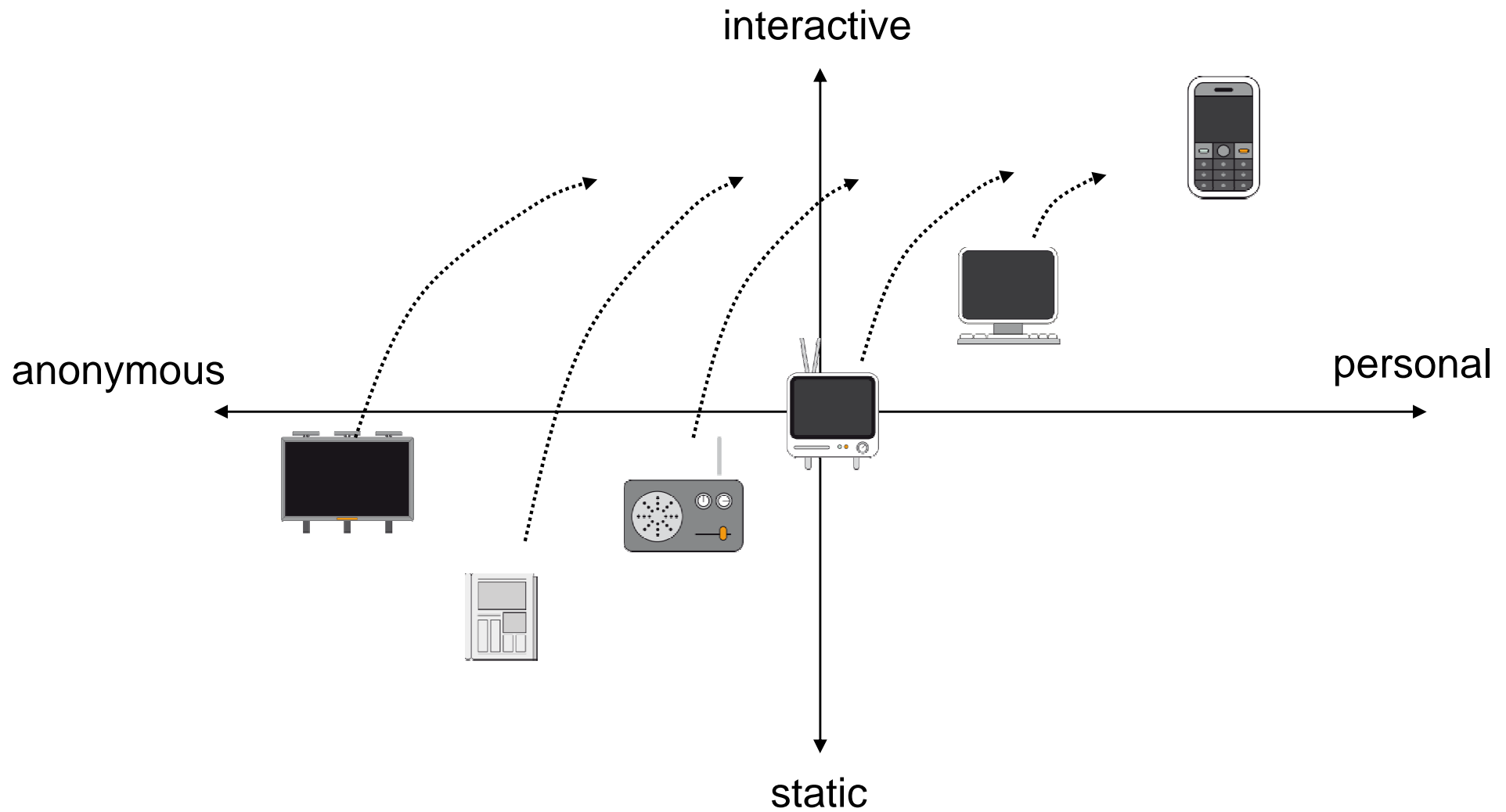
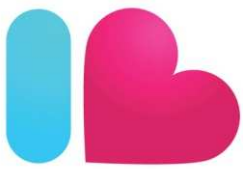
INTERACT
BARCELONA
2011

TOGETHER FOREVER? ONLINE + TRADITIONAL MEDIA

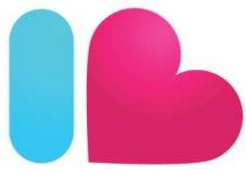


collective

personal



beyond its own attributes, mobile makes all media interactive



INTERACT
BARCELONA
2011

TOGETHER FOREVER?
ONLINE + TRADITIONAL MEDIA

pixels

Value

2000 K



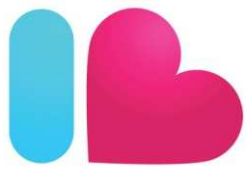
800 K



400K



intrusiveness



INTERACT
BARCELONA
2011

TOGETHER FOREVER?
ONLINE + TRADITIONAL MEDIA

Mobile consumer insights

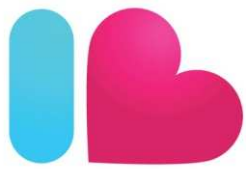
reach, usages, activities
multiple sources
local legitimacy



Mediascope Europe

Mobile Exposure 2010



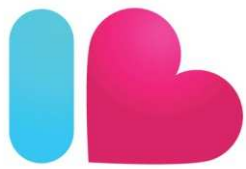


INTERACT
BARCELONA
2011

TOGETHER FOREVER?
ONLINE + TRADITIONAL MEDIA

Across 19 European
countries



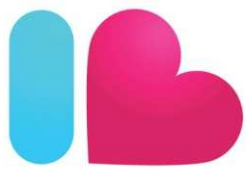


INTERACT
BARCELONA
2011

TOGETHER FOREVER?
ONLINE + TRADITIONAL MEDIA

INSIGHTS

- Mobile ownership
- Mobile internet penetration
- Mobile media activities
- Mobile advertising
- Mobile commerce



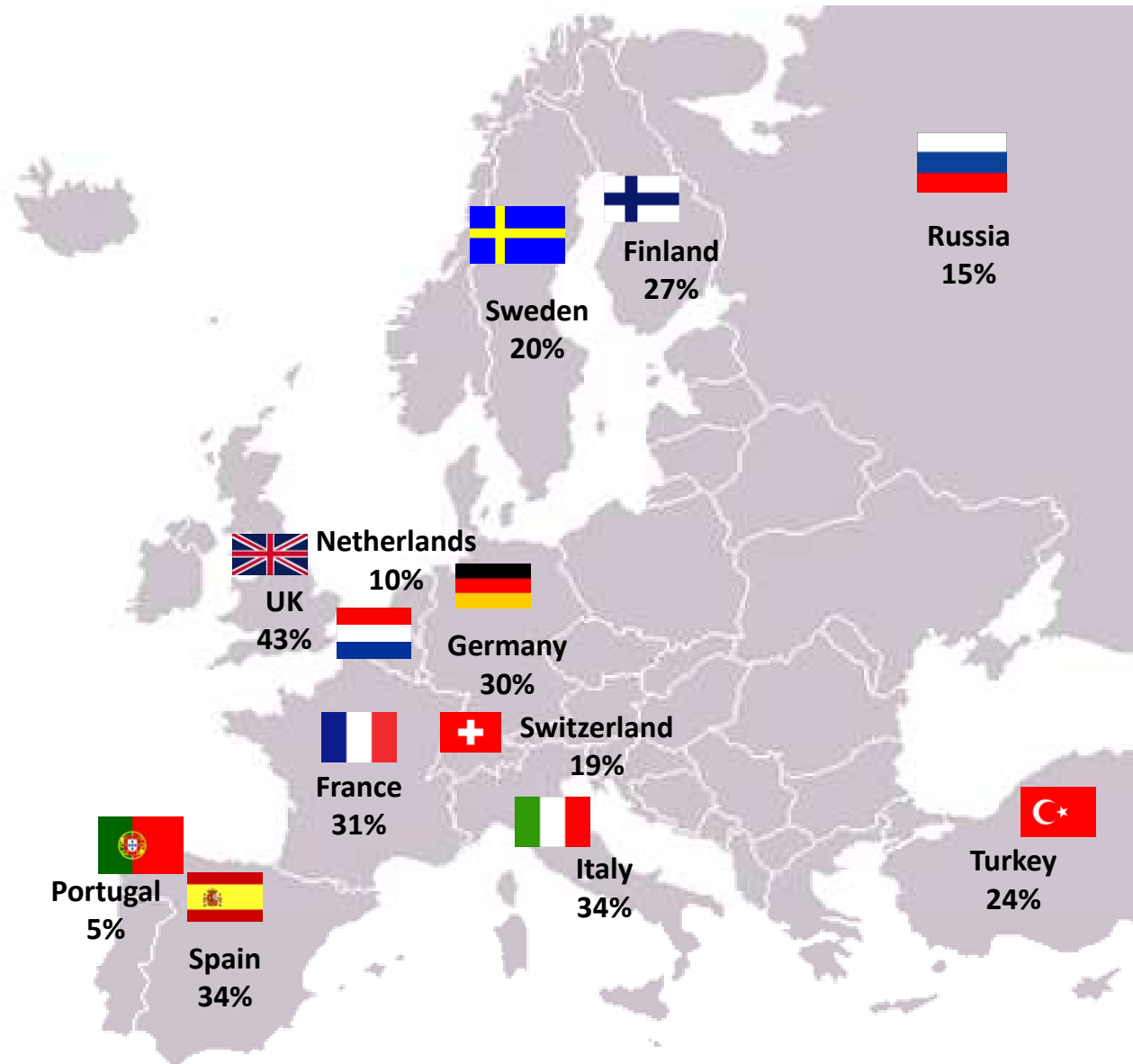
Mobile ownership in Europe

- Almost all European countries have a mobile penetration over 90%
- The countries with the highest mobile penetration are Finland (99%), Hungary and Romania (98%)

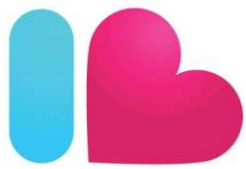


3 groups of mobile internet markets*

- Mature markets with high penetration (>30%) and rapid growth
- Average mature countries with mobile media penetration around 20
- Less mature markets with low penetration



* reach on mobile population "usage over last week"



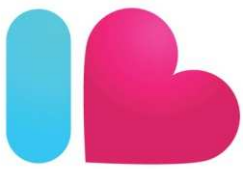
Mobile media usage in Turkey



- 12m mobile internet users → reach national pop.: 21%
- PC Internet penetration on national pop.: 20%
- Turkey is the only country studied where the mobile penetration is higher than the PC internet reach.

Activities on mobile media

- browsing, email and social networking
- In mature markets, the preferred activity is browsing....
- ...whereas in less mature markets (Switzerland, Russia) the preferred activity is sending/receiving emails.



Media meshing

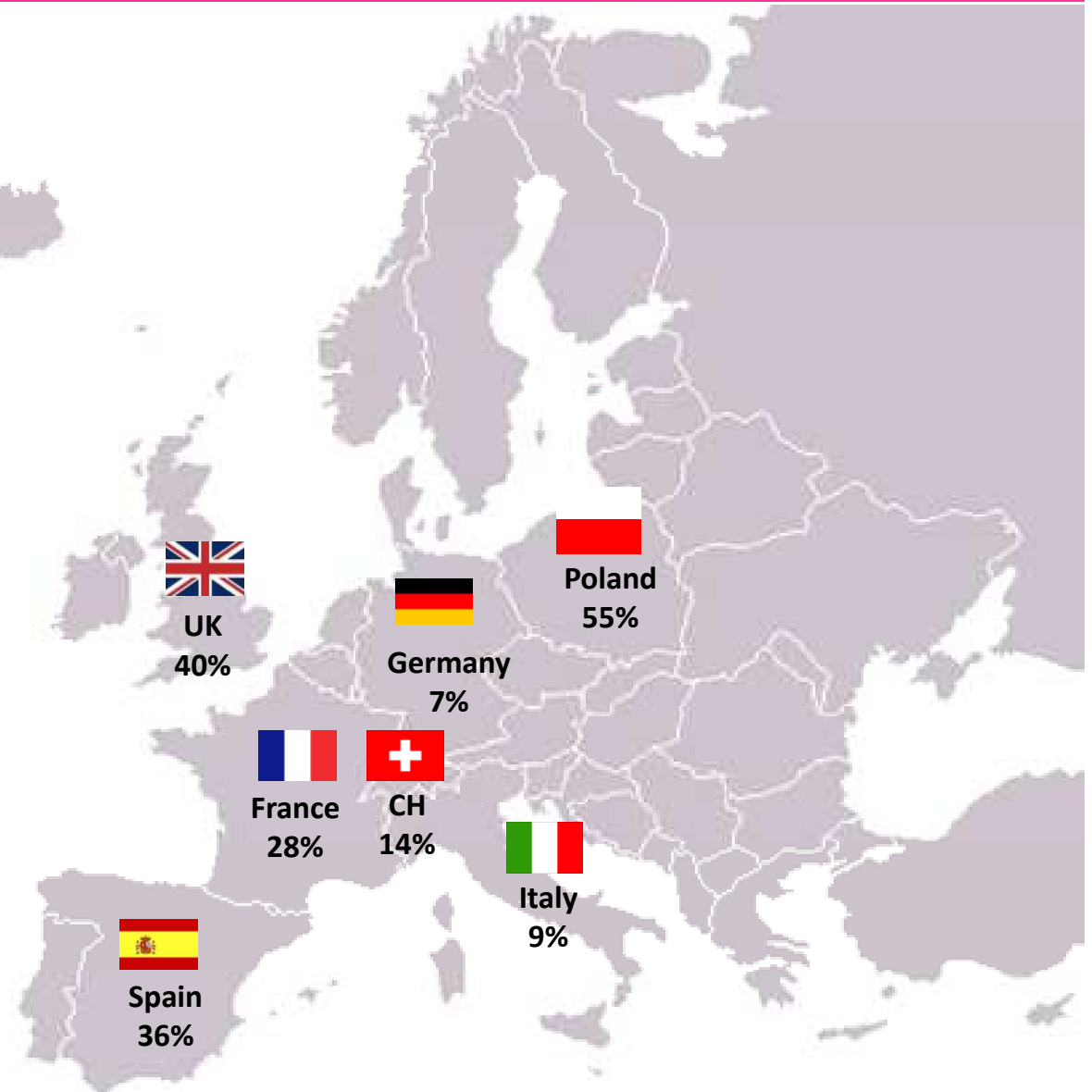
- Mobile media users use other media while using mobile Internet.
- When they media mesh, mobile Internet users primarily watch TV or listen to the radio.

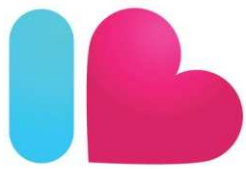
Mobile advertising: relevant for consumption

- Mobile media users use mobile media to get information on products and services.
Highest in Romania(30%) and Finland(27%)
- In some countries, more than 60% of the mobile internet users are interested in mobile ad formats.
The highest % is in Poland (67%)
- In mature markets, SMS ads get popular.
In Spain in 2010, 67%* have received sms ads (+12% vs 2009)

M-commerce

- Poland has the greatest penetration of M-commerce among mobile internet users (55%)
- Still quite low in Germany and Italy but growing fast (+97% in Germany and +45% in Italy 2010 vs 2009).
- M-commerce usage is very low in the other European countries (less than 5%), so there is still a big potential for growth.





INTERACT
BARCELONA
2011

TOGETHER FOREVER?
ONLINE + TRADITIONAL MEDIA

THANK YOU

Bruce Hoang, group marketing director, orange advertising