Connecting the World

Mobile and Social Media Trends

Insights from the Worldwide Independent Network (WIN).

Winter 2012

WIN Worldwide Independent Network Of Market Research

redc

Content

- WIN, the Worldwide Independent Network of Market Research, conducted a ground-breaking study on mobile and social media trends around the world towards the end of 2011.

- This is the media report covering a few selected questions.

- The full report including a detailed country report for Ireland can be purchased – please see slide 15 in this presentation for further details.

Who is WIN

Worldwide Independent Network (WIN) is the largest association of leading independent market research and polling firms throughout the world.

The WIN is made up of the **68** largest independent market research and polling firms in their respective countries with a combined revenue of over **$600** million and covering **89%** of the world's market

What we do

With 68 Members, the accumulated expertise of the WIN is formidable and our mission is to offer clients the Best of Both Worlds: the highest quality at the most competitive price.

WIN and its Members consistently demonstrate their expert ability to conduct multi-country surveys on a comparable basis and deliver the highest quality. Our Members are leading national institutes with a profound local knowledge of research methods and techniques, statistical sources, customs, and cultural differences of their own country. With only one Member agency per country carefully selected by the Association Board, Members work together on a daily basis to share knowledge, new research techniques and tools, as well as to provide the most appropriate solutions to international research projects and service our clients to the best of our abilities.

WIN Worldwide Independent Network Of Market Research

Background & Methodology

Background

WIN presents, Connecting the World, a ground-breaking report on mobile and social media trends around the world.

WIN Members came together to conduct a study on Mobile and Social Media trends. This report will provide you with a better understanding of how people are involved with Social Media today, how consumers interact and access the Social Media space, how Social Media and user-generated content are being integrated on multiple devices, the frequency and preferred modes of interaction and consumer concerns.

Methodology

Methodology and Geographical distribution:
In total, the study was carried out in **44 countries**. In each country, the most appropriate interviewing methodology was used given local conditions.

The Sample:
The total size of the sample is **40 557** cases representative of **1 270 728 664** people.
Sample in each country is probabilistic and was designed and weighted to represent the general adult population.

Key Findings

Worldwide, interaction through social media is becoming a constant, and the ability to connect anywhere and anytime, a must. According to the ground-breaking WIN survey of 40 550 respondents, these trends are changing lifestyles and consumers around the globe are shifting and adapting the way they communicate.

5 Key Findings in Mobile & Social Media Trends

1. The number of smartphones owned globally almost doubled in one year from 19% in 2010 to 35% in 2011 and is expected to rise over the next 12 months.

2. Smartphone and tablet ownership is Ireland has seen an explosive growth in the past year with 49% owing a smartphone and 16% owning a tablet – this is continued to increase further in 2012.

3. Mobility and ease of access prove to be key for many consumers as approximately 25% of consumers conduct the most frequent online activities on their mobile device.

4. Although 1 in 3 people currently use mobile banking, concerns about security are a barrier to using new advanced features for smartphone users.

5. Globally, Internet users spend an average of 18 hours online per week, or 2.6 hours per day.

6. Overall, 1 in 4 minutes online is spent on social media sites.

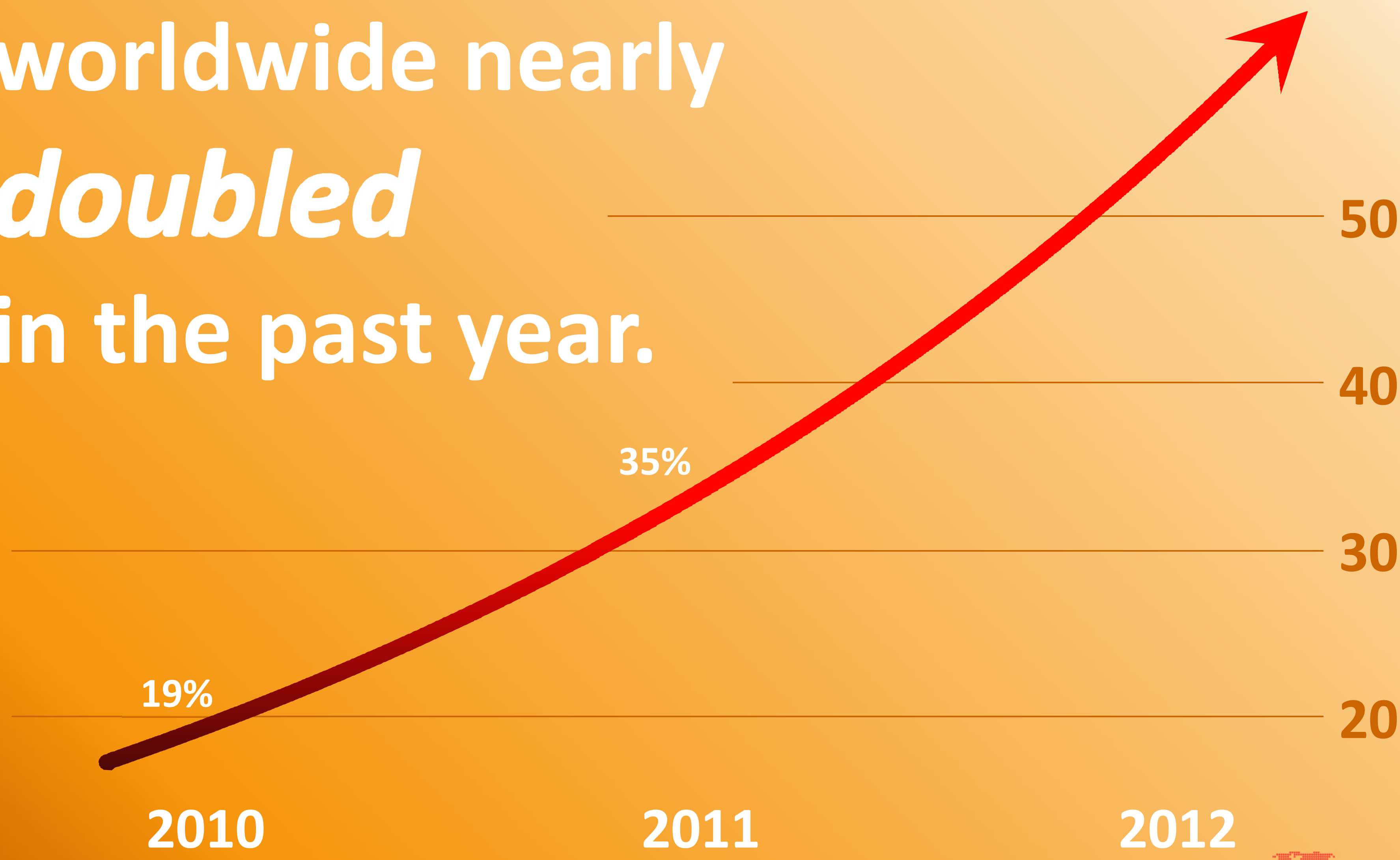
Internet Penetration

Number of Internet users by country

Country	Number of Internet Users	% Population Penetration
China	456 238 464	34
United States	243 542 822	79
India	121 567 256	11
Japan	102 063 316	80
Brazil	81 748 504	41
Germany	66 825 986	82
Russia	59 937 788	43
United Kingdom	52 996 180	85
France	51 879 480	80
Nigeria	45 944 229	28
South Korea	40 708 389	84
Italy	32 610 044	54
Turkey	30 981 601	40
Pakistan	30 943 124	17
Spain	30 940 417	67
Canada	27 547 949	82
Poland	23 970 571	62
Egypt	21 518 178	27
Australia	16 351 973	76
Malaysia	15 635 925	55
Morocco	15 497 440	49
Argentina	14 883 552	36
Saudi Arabia	10 550 028	41

Country	Number of Internet Users	% Population Penetration
Romania	8 768 340	40
Kenya	8 568 890	21
Belgium	8 261 661	79
Sweden	8 166 650	90
Czech Republic	7 020 815	69
Switzerland	6 396 064	84
Austria	5 971 694	73
Hong Kong	4 920 255	69
Greece	4 772 975	44
Finland	4 566 129	87
Tunisia	3 873 215	37
Ireland	3 229 108	70
Serbia	3 004 042	41
Bosnia and Herzegovina	2 403 231	52
Lithuania	2 202 352	62
Palestinian Territories	1 561 997	37
Lebanon	1 278 827	31
Afghanistan	1 164 829	4
Armenia	1 097 717	37
Republic of Macedonia	1 075 413	52
Iceland	293 465	95

Usage of smartphones worldwide nearly ***doubled*** in the past year.



The World in Your Pocket

Device ownership and future purchasing intent

Worldwide, consumers favor devices that are more mobile and offer constant access to the Internet.

The number of smartphones owned almost doubled in one year from 19% in 2010 to 35% in 2011 and is expected to rise over the next 12 months.

Feature phones on the other hand, experienced a slight decline in 2011.

While computer ownership somewhat plateaued in 2011, laptop purchases are expected to experience much greater growth, given consumer interest in ultrabooks.

In 2012, consumers will favor laptops (32%) over desktops (22%), smartphones (32%) over feature phones (24%), and as many people are likely to buy a tablet computer (24%) as a desktop (22%).

Device Penetration

Consumer trends for 2010, 2011 and 2012

Device	% People Own		In 2012, % will buy
	2010	2011	
Feature Phone	86	80 ↓	24
Computer	73	68 ↓	22
Laptop	60	59	32
Smartphone	19	35 ↑	32
Tablet Computer	NA	11	24

In 2010, 19% of consumers owned smartphones

2010: 19%

In 2011, 1 out of 3 consumers owned smartphones

2012: 35%

Q. Do you or anyone in your household own any of the following devices?
Q. How likely are you to purchase the following devices in the next 12 months?

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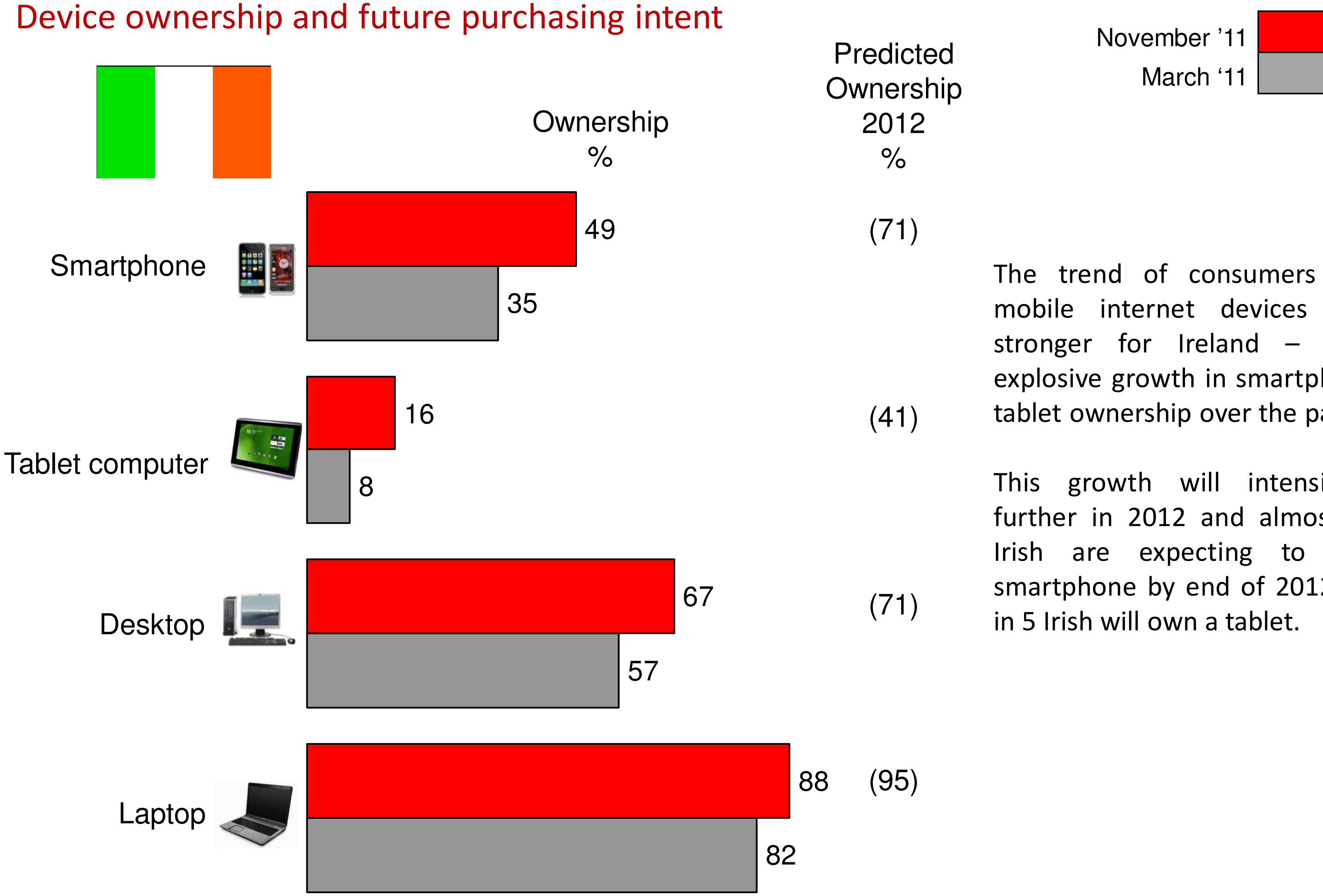
Ireland – Explosive Growth in Smartphone and Tablet Ownership

Device ownership and future purchasing intent



The trend of consumers favoring mobile internet devices is even stronger for Ireland – with an explosive growth in smartphone and tablet ownership over the past year.

This growth will intensify even further in 2012 and almost 3 in 4 Irish are expecting to have a smartphone by end of 2012 while 2 in 5 Irish will own a tablet.

Q. Do you or anyone in your household own any of the following devices?
Q. How likely are you to purchase the following devices in the next 12 months?

Smartphone Demographics

Demographics of smartphones owners

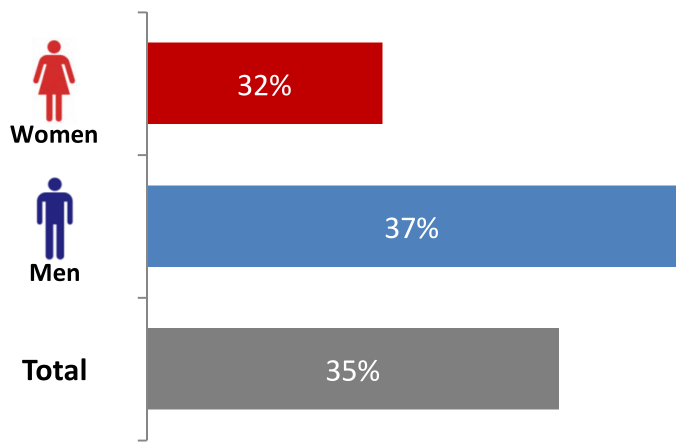
Globally, more men than women own smartphones.

2012 purchasing trends based on gender are consistent with those of 2011.

Overall, and as expected, 25 to 34 and under 25 years old are the age groups that lead in smartphone penetration (41% and 39% respectively).

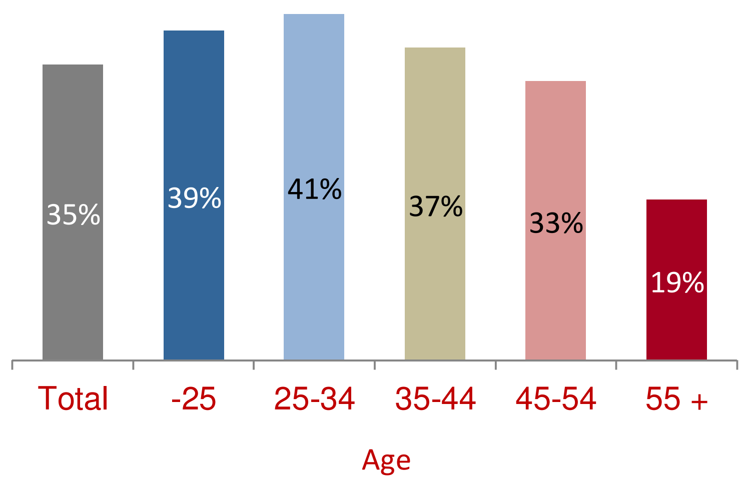
Penetration by Gender Among Smartphone Owners

Ownership in 2011



Penetration by Age Among Smartphone Owners

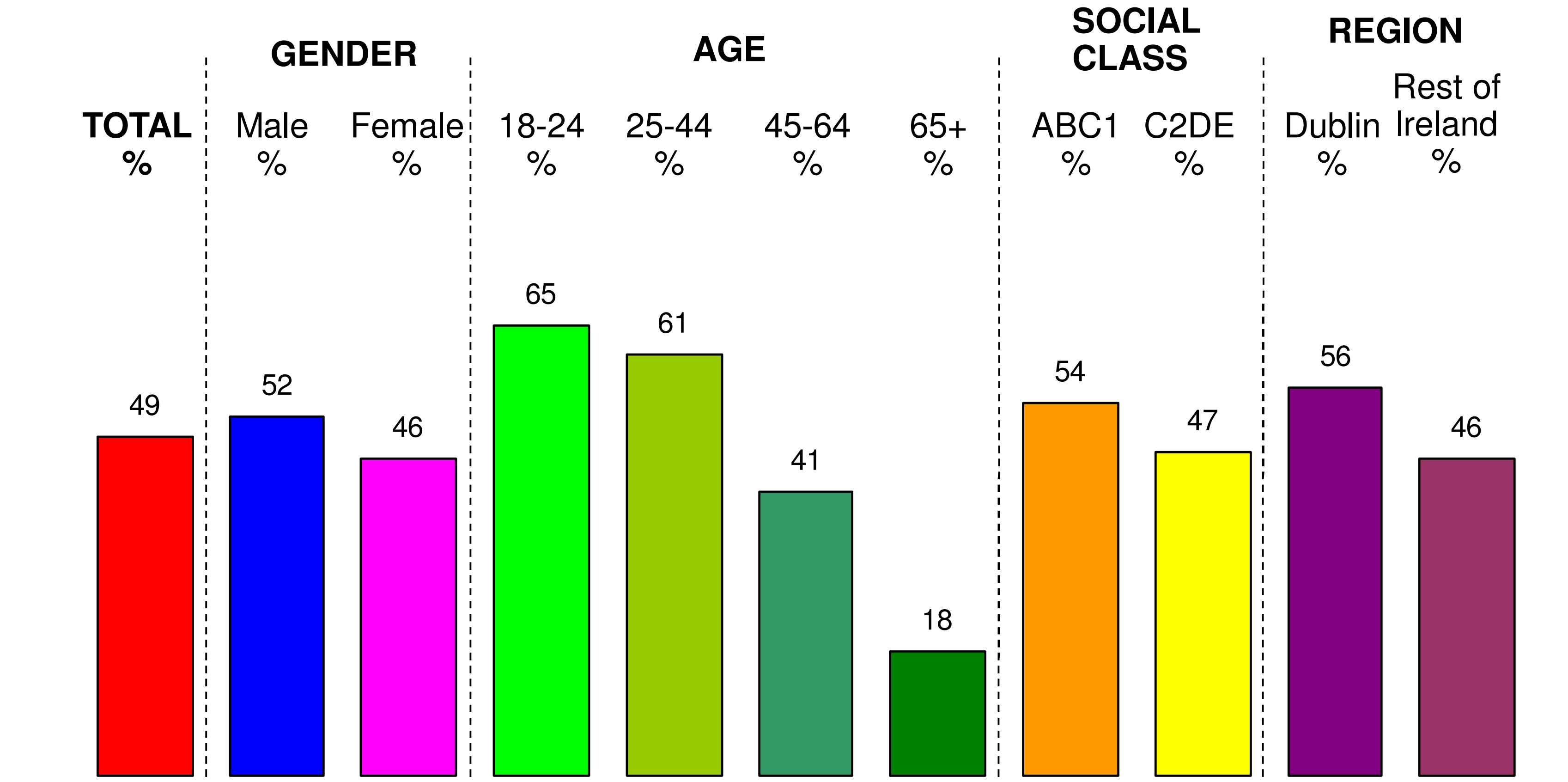
Ownership in 2011



Q. Do you or anyone in your household own any of the following devices?
Q. How likely are you to purchase the following devices in the next 12 months?

Smartphone Demographics for Ireland

Demographics of smartphones owners



Smartphone ownership in Ireland is significant higher among those aged 18-44 years and those living in Dublin

Q. Do you or anyone in your household own any of the following devices?
Q. How likely are you to purchase the following devices in the next 12 months?

Leading Industry Brands

Brand preference among buyers

While Nokia is still the most preferred brand for feature phones, people still covet the Apple iPhone throughout the world with 38% preferring it over other brands.

Samsung remains a strong contender in both markets with 15% and 14% respectively. Although its share is smaller, LG is also present in both markets, with 7% for feature phones and 3% for smartphones.

Dell leads in brand preference for both desktops and laptops.

Dell is the preferred brand for desktops (15%) and laptops (18%), followed by Apple (13% and 16% respectively), HP (13%), Acer (6% and 9% respectively) and Samsung (6% and 7% respectively).

In the newer market of tablet computers, Apple leads with close to half of consumers (47%) who will choose an Apple over another brand in this category. Apple is also significantly favored for MP3 buyers with 34% of consumers who will choose an Apple followed by Sony at only 10%.

Smartphone

Brand	%
Apple	38
Samsung	15
Nokia	8
RIM/BlackBerry	7
HTC	6
LG	3

Feature Phone

Brand	%
Nokia	31
Samsung	14
LG	7
Dell	4
Sony	4
Ericsson	2

Laptop computer

Brand	%
Dell	18
Apple	16
HP	13
Acer	9
Samsung	7
Toshiba	7

Desktop computer

Brand	%
Dell	15
Apple	13
HP	13
Acer	6
Samsung	6
LG	5

Tablet Computer

Brand	%
Apple	47
Samsung	12
Dell	4
Amazon	3
Sony	3
RIM/BlackBerry	3

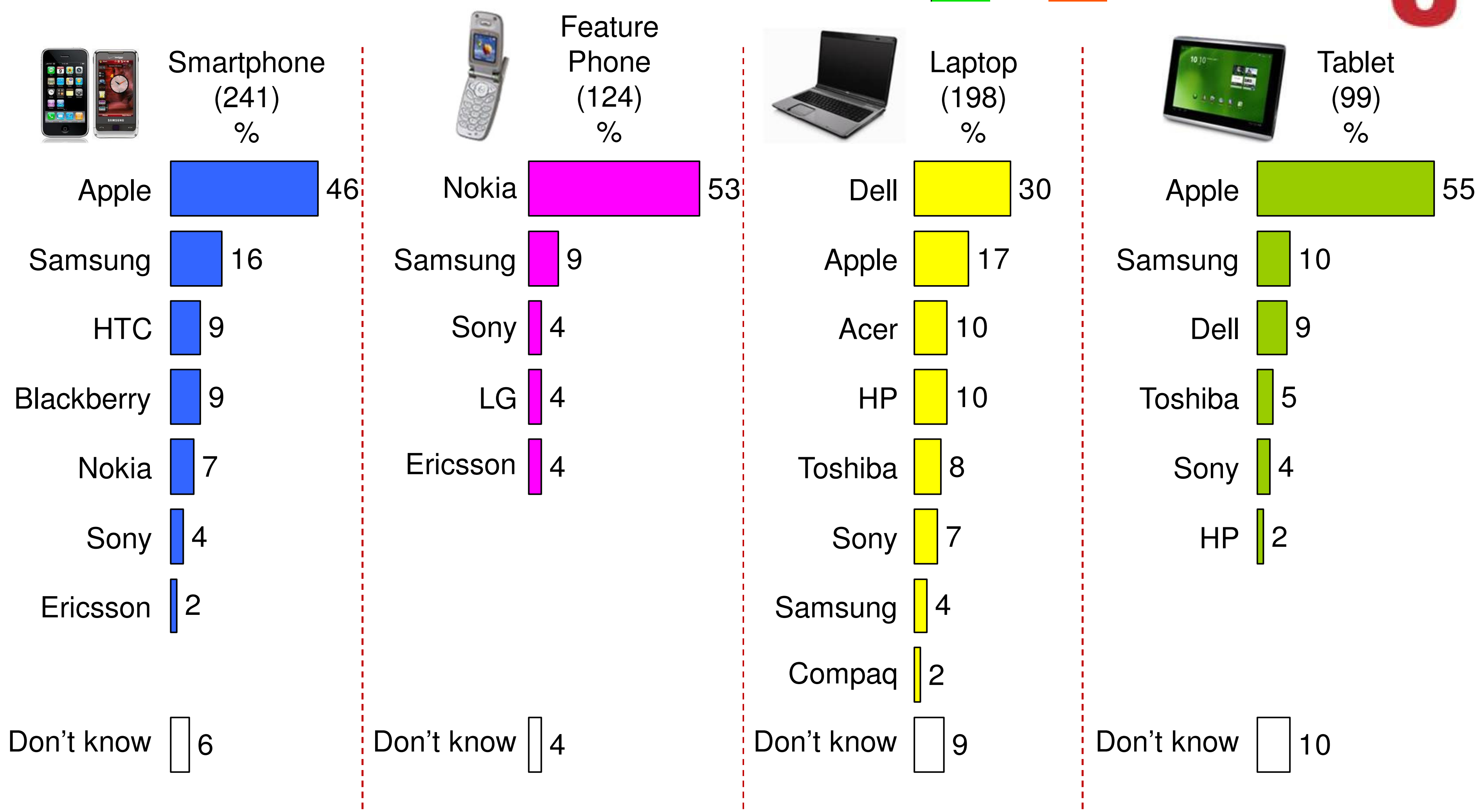
mp3 player

Brand	%
Apple	34
Sony	10
Samsung	7
Amazon	3
Dell	3
LG	3

Q. Which brand do you think you would be most likely to purchase?

Brands Preference Ireland

(Base: All Who Are Very Likely To Buy Device Within Next 12 Months)



Apple continues to dominate smartphone and tablet purchase but other brands are catching up.
Dell leads purchase intention for laptop followed by Apple, Acer and HP.

(Q 2c)

Profiling the Smartphone User

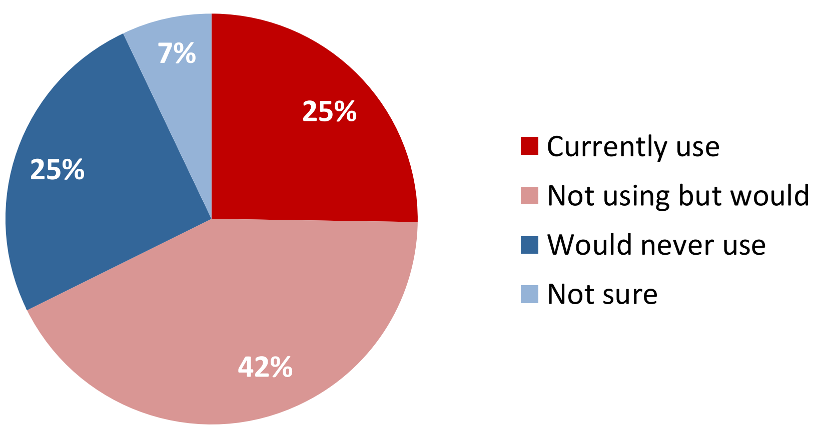
Mobile payment/wallet usage and barriers to usage among smartphone users

68% of smartphone users are either already using mobile payments/wallet (25%) or would consider using them in the future (43%).

On the other hand, a quarter of these consumers would still never use this type of mobile service.

Security is the main barrier for smartphone owners to use services such as mobile payments/wallet, with over half (54%) mentioning this as a barrier. Other concerns include fraud (39%) and privacy (29%).

Smartphone Users' Usage and Attitudes
to Mobile Payment/Wallet

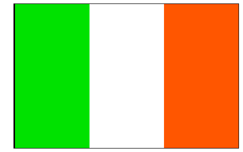


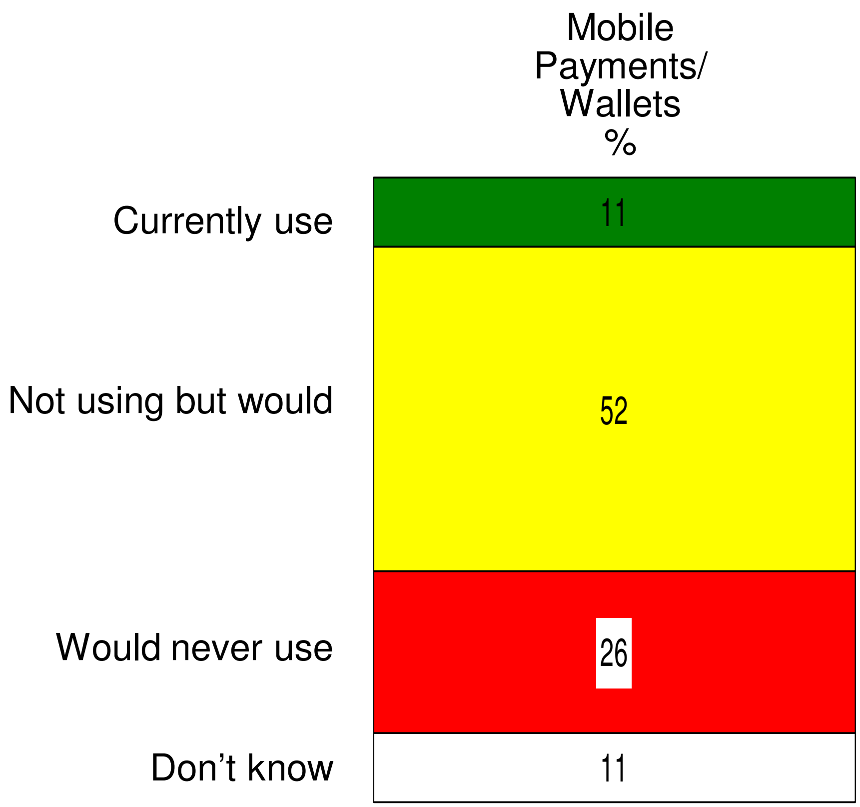
Smartphone Users' Barriers
to Mobile Payment/Wallet

Q. Can you tell me if you currently do mobile payments/wallet, are open to doing it in the future, or would never do it.
Q. Thinking of the previously mentioned service to which you answered you would never do, what are the main barriers to you using these types of services through your phone?

Usage Of Advanced Mobile Payments/Wallet for Ireland

(Base: All Smartphone Users – 498)





1 in 10 smartphone users in Ireland express that they are currently using mobile payments/wallet. The majority of non-users express intention to use in the future.

(Q 7a)

Methodology

List of the 44 participating WIN Members, their fieldwork dates and the margin of error:

Country	Firm	Fieldwork dates	Margin of error
Afghanistan	ACSOR-Surveys	Nov. 25-Dec. 2	3,05%
Argentina	IBOPE Inteligencia	Nov. 7-17	3,09%
Armenia	MPG	Nov. 8-24	3,10%
Australia	Colmar Brunton	Nov. 16-24	3,06%
Austria	Gallup Austria	Oct. 19-Nov. 10	4,25%
Belgium	Dedicated Research	Nov. 16-21	3,09%
Bosnia	Mareco Index Bosnia	Oct. 26-Nov. 11	3,58%
Brazil	Ibope Inteligencia	Nov. 7-17	2,61%
Canada	Leger Marketing	Oct.19-Nov.6	3,09%
China	WisdomAsia RisingSun	Nov. 10-13	4,90%
Czech Republic	Mareco Ltd.	Oct. 21-Nov. 7	4,38%
Egypt	RADA Research & Public Relations	Nov. 4-13	3,10%
Finland	Taloustutkimus Oy	Oct. 26-31	3,03%
France	BVA	Nov. 18-23	3,10%
Germany	Produkt+Markt	Oct. 26-Nov. 4	3,08%
Greece	Centrum S.A	Nov. 2-17	3,10%
Hong Kong	Consumer Search	Nov. 1-16	3,46%
Iceland	Capacent	Nov. 18-28	3,47%
India	DataPrompt	Oct. 24-Nov. 18	3,46%
Ireland	Red C Research	Nov. 4-14	3,08%
Italy	Doxa	Oct. 28-Nov. 10	3,10%
Japan	NRC	Nov. 11-14	3,10%

Country	Firm	Fieldwork dates	Margin of error
Kenya	Infinite Insight	Oct. 25-Nov. 5	3,09%
Korea	Gallup Korea	Oct. 28-Nov. 7	3,01%
Lebanon	Reach	Oct. 25-Nov. 8	3,10%
Lithuania	UAB RAIT	Nov. 8-18	3,10%
Macedonia	BRIMA	Nov. 17-27	3,42%
Malaysia	TNS Research International	Nov. 2-16	3,52%
Morocco	BJ Consult	Nov. 9-Dec. 2	3,05%
Nigeria	TNS RMS	Nov. 17-30	3,49%
Pakistan	Gallup Pakistan	Oct. 23-29	2,34%
Palestine Territories	Palestinian Center for Public Opinion (PCPO)	Nov. 29-8	4,38%
Poland	Mareco	Oct. 27-Nov. 3	3,01%
Romania	TNS CSOP	Oct. 26-Nov. 11	2,89%
Russia	Romir	Oct. 21-24	3,10%
Saudi Arabia	PARC	Oct. 20-28	3,05%
Serbia	TNS Medium Gallup	Oct. 20-28	3,09%
Spain	Instituto DYM	Oct. 13-31	3,10%
Sweden	CMA Research	Oct. 26-Nov. 11	3,09%
Switzerland	Isopublic	Nov. 3-21	3,10%
Tunisia	EMRHOD	Nov. 17-21	4,38%
Turkey	Barem Research	Nov. 16-22	3,13%
United Kingdom	ORB	Nov. 10-17	3,09%
USA	TRiG	Oct. 27-Nov. 4	3,10%

Buy the Full Report

The full report is available for purchase for **€5,000** excluding VAT.

For this price you will receive a detailed global report and a detailed country report for Ireland covering the following topics:

- ✓ Device ownership for smartphone, feature phone, desktop, laptop, tablet, web-enabled TV/gaming console and mp3 player with internet/wi-fi access.
- ✓ Future purchasing intent for these devices.
- ✓ Preferred brands for future purchases of these devices.

- ✓ Time spend online for personal, work and social media reasons.
- ✓ Key online activities.
- ✓ Preferred devices for key online activities.
- ✓ Social media sites used for personal and work reasons.

- ✓ Current and future use of advanced mobile phone features, e.g. mobile payments, mobile tickets, geo based promotions, mobile banking and mobile boarding card.
- ✓ Barriers for use of advanced mobile phone features.

- ✓ Demographic breakdown.

It will also be possible to request additional analysis based on the available data, e.g. if you want to know mobile and social networking behavior or a particular demographic group.

Footnotes

General: Definitions of the devices mentioned in the survey as described in the questionnaire: Desktop computer; Laptop computer; Cell Phone (not a Smartphone); Smartphone (iPhone, Android BlackBerry, etc.); Web-enabled TV or gaming console (xbox/playstation/etc); Tablet Computer (Apple iPad, BlackBerry PlayBook, Samsung Galaxy, HP Slate, etc.); Mp3 player with Internet/wi-fi access (such as Zune HD, Sony X Series Walkman, Apple iPod Touch, etc.)

General: Mentions of Korea throughout the report refer to South Korea and do not include North Korea. The Palestinian Territories include the West Bank and the Gaza Strip.

General: Regional data is based on the 44 surveyed countries split into their respective regions.

Page 7&8: 2010 data is based on the 2010 WIN/GIA Global Trend Tracker on Social Media conducted in Spring 2010 in 27 countries throughout the world.

Page 11: Definitions of the Mobile payments/Wallet was presented as follows in the questionnaire- Be able to store and use your personal payment information on your mobile device, to pay goods and services directly from your mobile device whether at a store or online.

Page 11: Information presented on these pages is based on the total number of smartphone users only, based on Q2A, or the data presented on page 7.