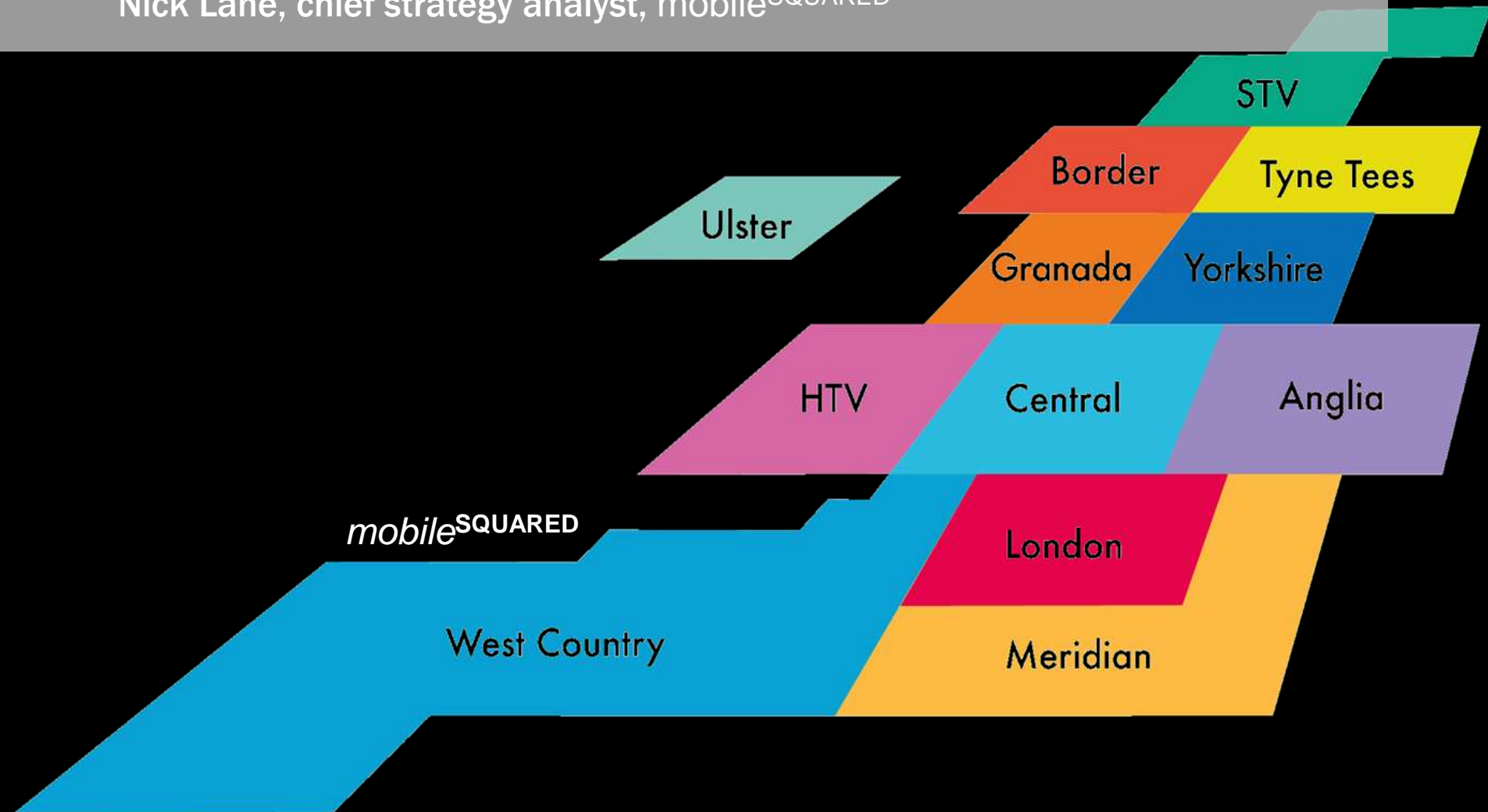


UK Scene Setter, FMCG & Media, Feb '12

Nick Lane, chief strategy analyst, mobile^{SQUARED}



About mobile^{SQUARED}

Research specialists in mobile consumer engagement



We do it using *Mobile Consumer Trends*, the only forward-looking mobile consumer forecasts, based on extensive ongoing qual/quant mobile market and consumer research.

How we do it

We create the Mobile Market Forecasts



Then segment the data by



- Advertising
- Apps
- Internet
- Marketing
- Commerce



Then by



- Device type
- Age
- Gender
- Location
- Socio-economics

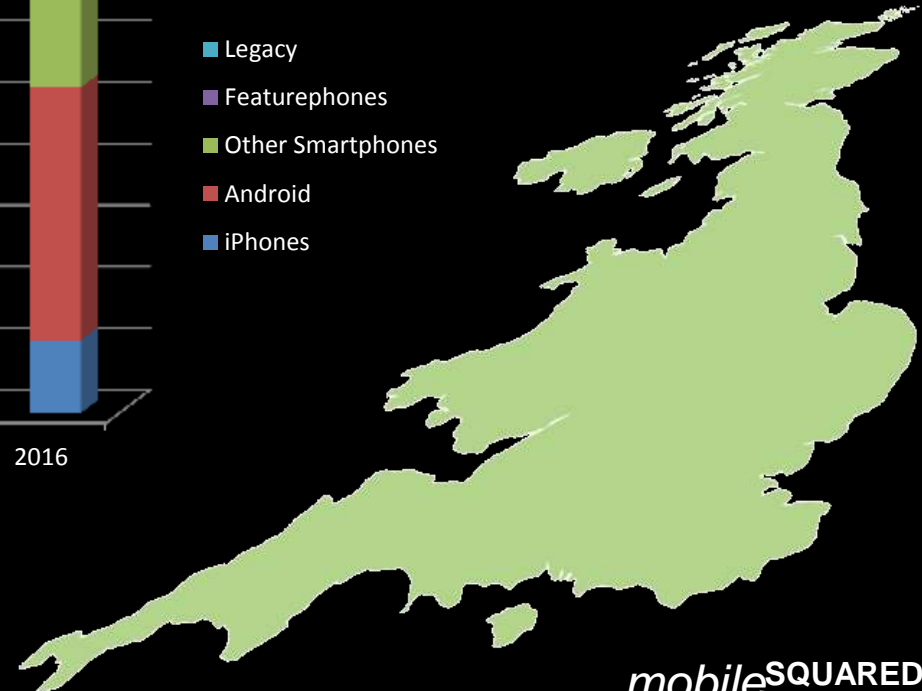
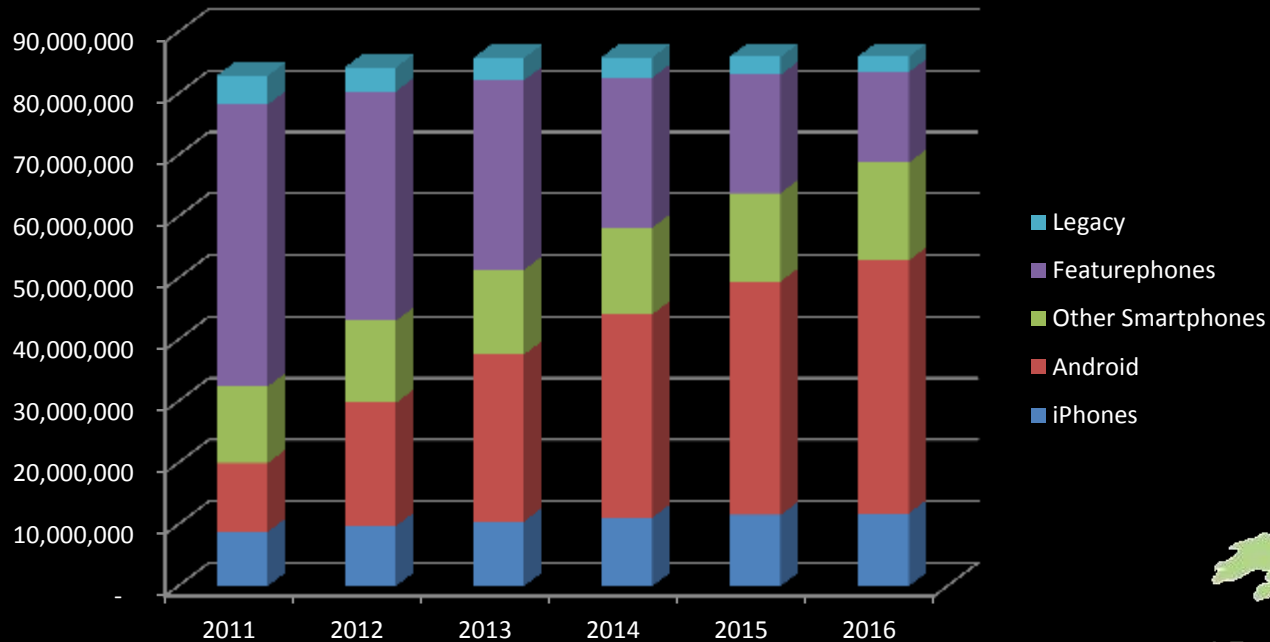


Then we forecast

The UK

Over 84 million mobile subscriptions end 2012

Smartphones to hit 43.1 million in 2012 – dominant device type



The mobile filter

20.03m



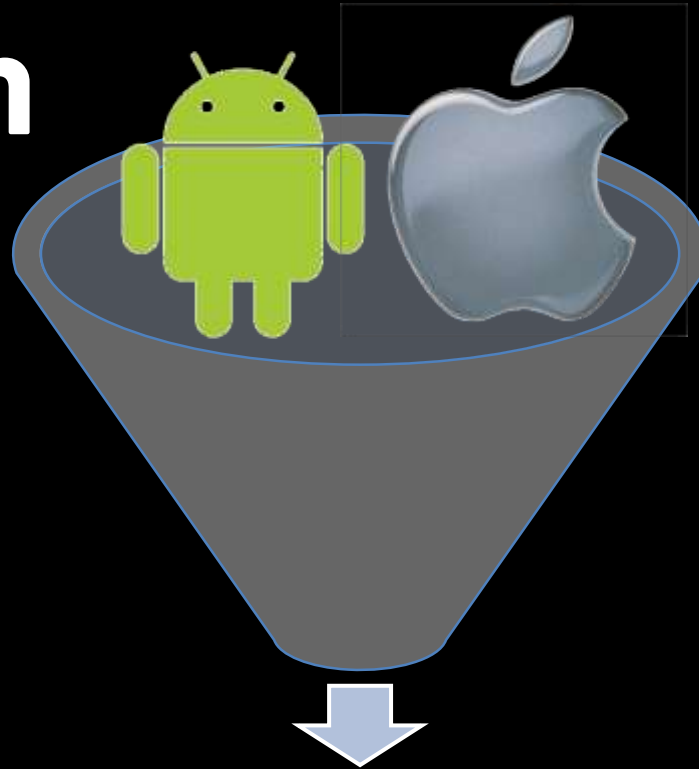
9.7m



The mobile filter reality

35-44 yo

2.1m

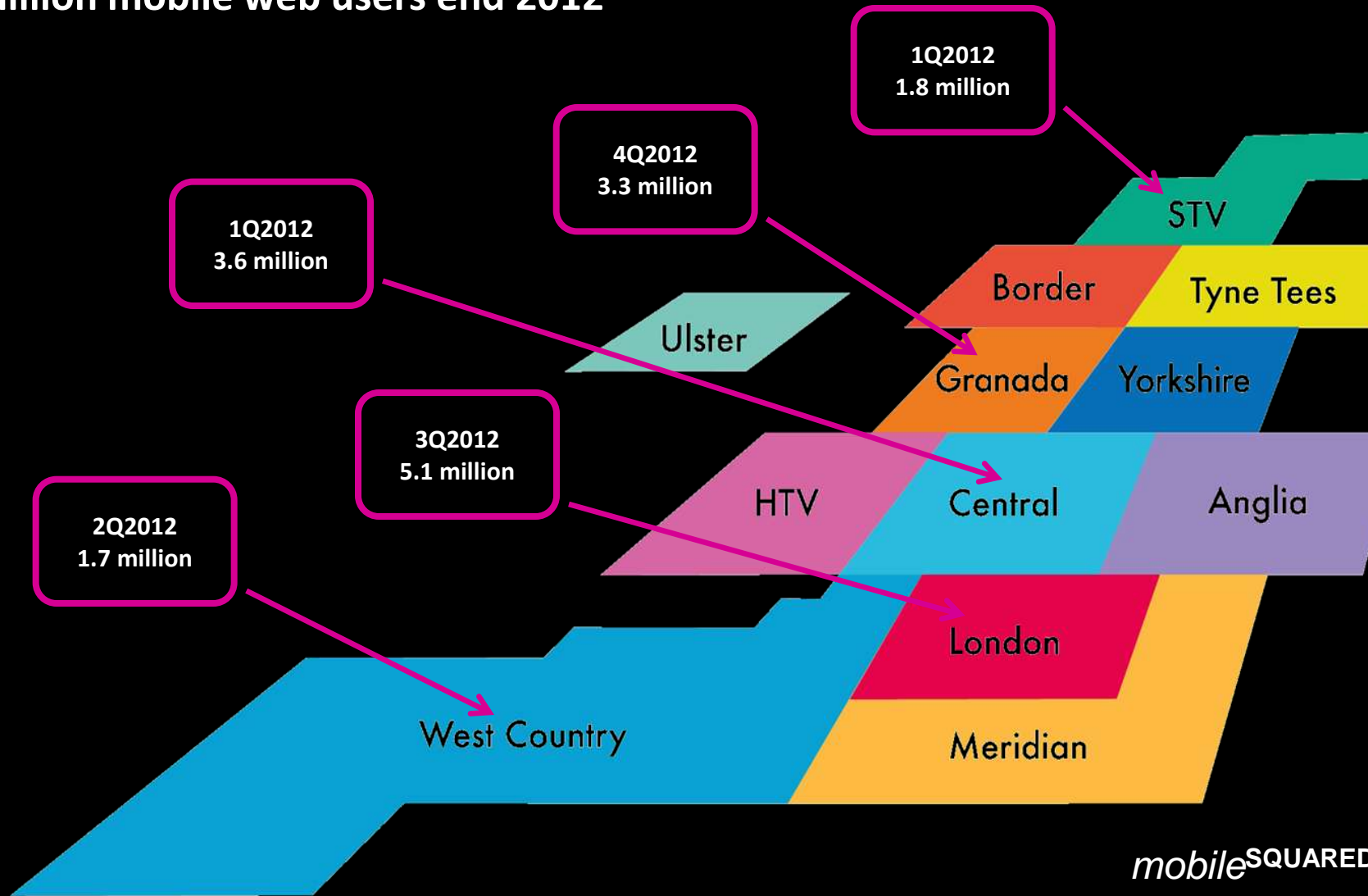


1.8m



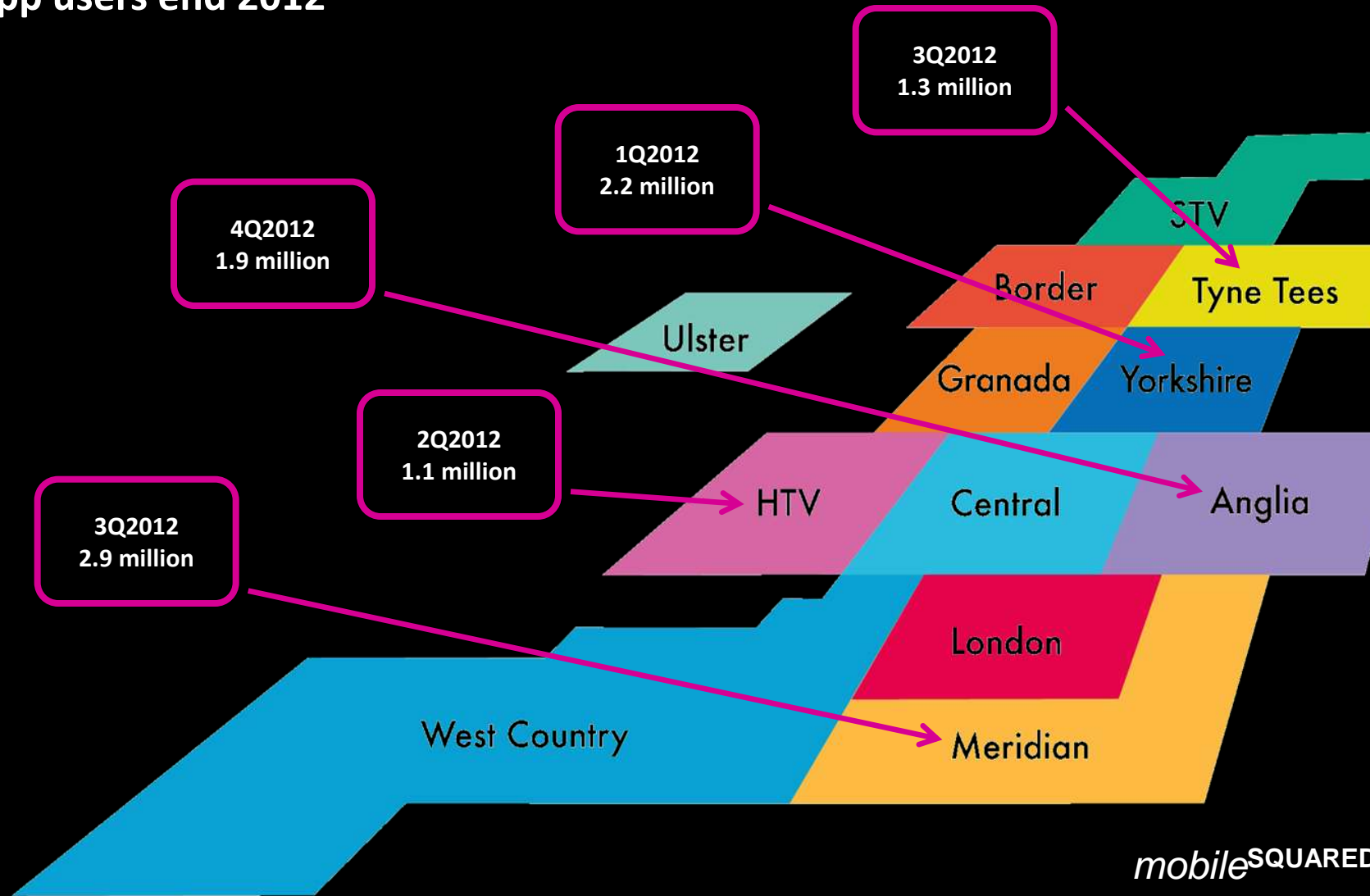
Totals – mobile web

33.2 million mobile web users end 2012



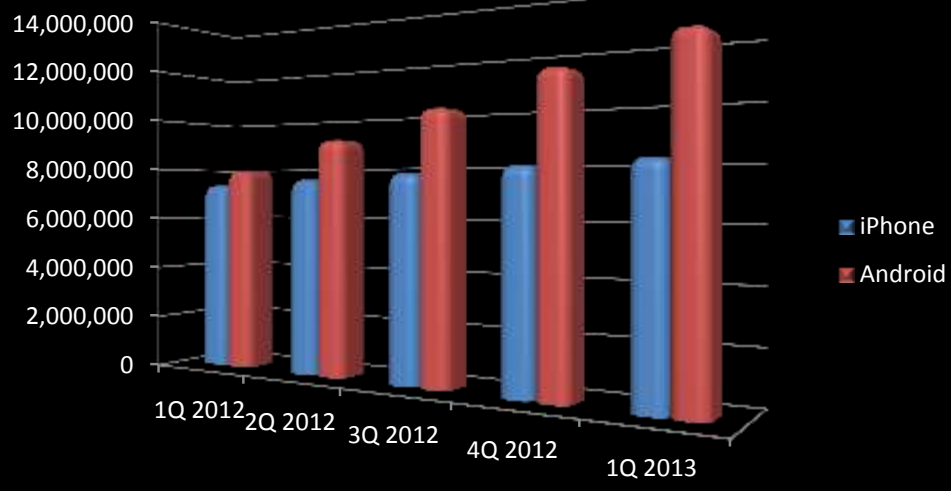
Totals - apps

29.3 app users end 2012

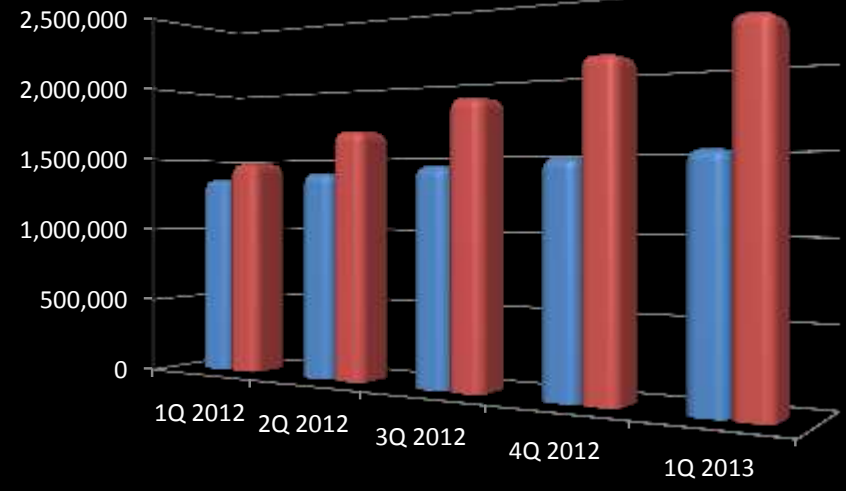


15m to 320,000: impact of targeting

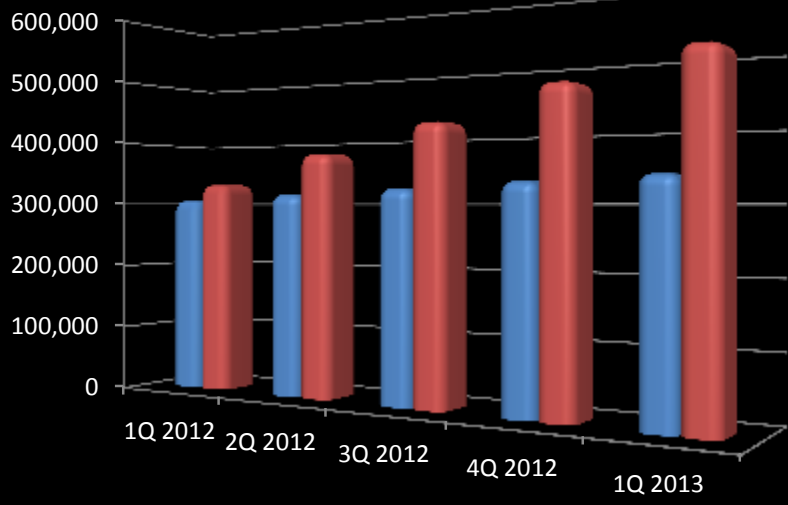
App users



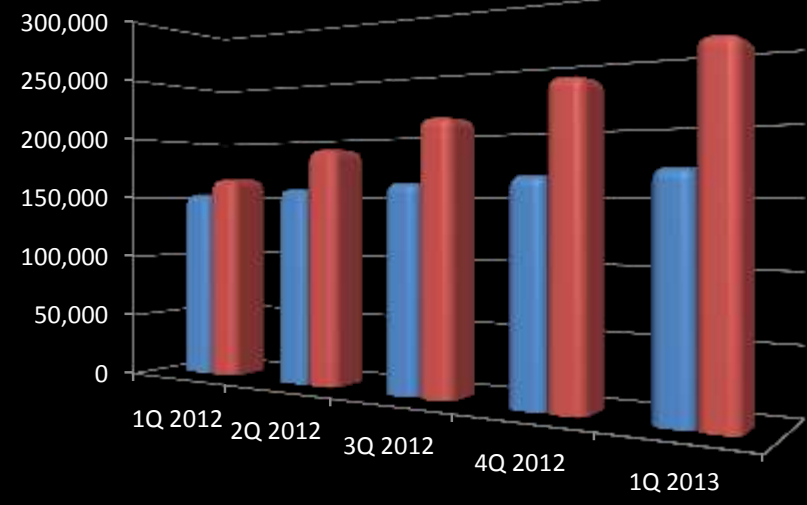
Apps users London



App users London, 35-44



App users London, 35-44, male



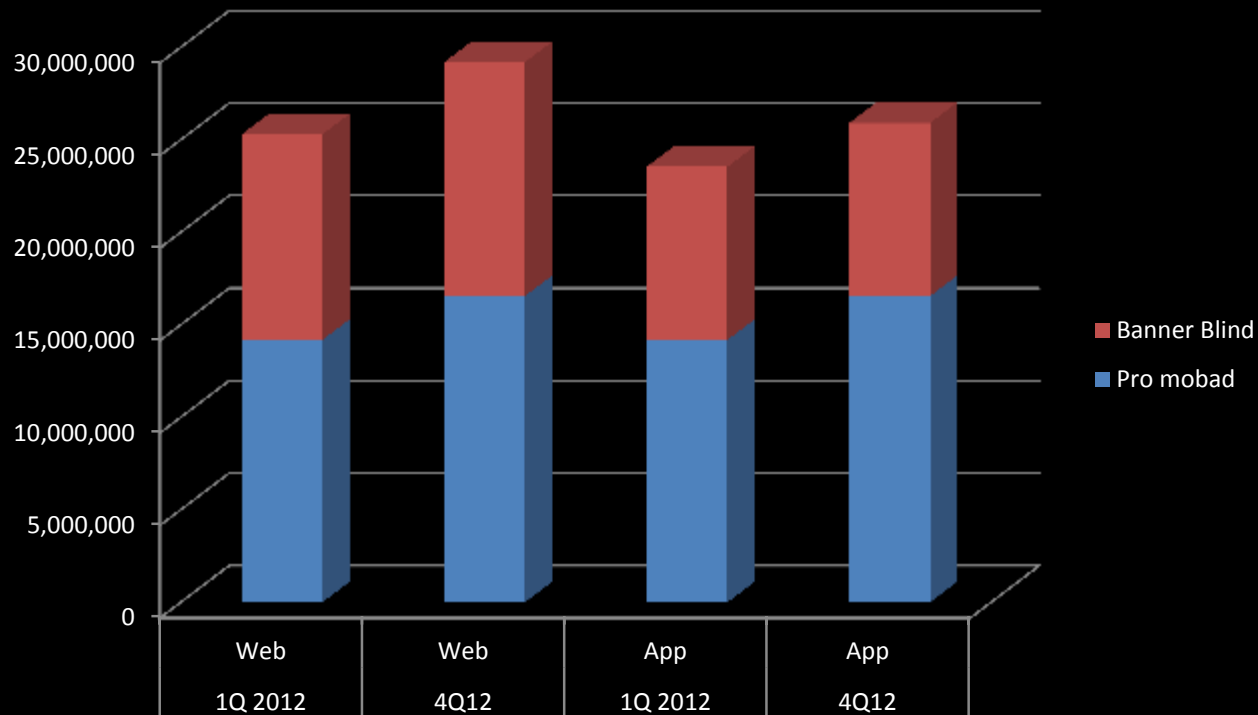
Bigger numbers

5 million

35-44 yo app users

The really interesting stuff

Mobad audience 2012



56% of all mobile web users “acknowledge” mobile advertising & 64% of all app users

The power of mobad in 3Q2012

3.2 million buy on mobile

3.6 million viewed on mobile, PC purchase

2.2 million driven in-store

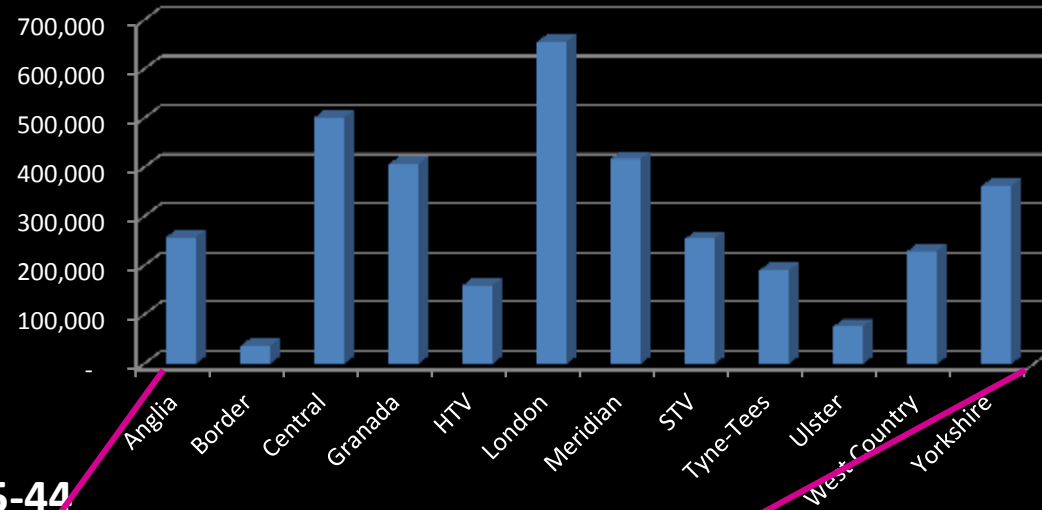
- 18-24 yo's most likely to respond (32%)

The power of mobad in 3Q2012

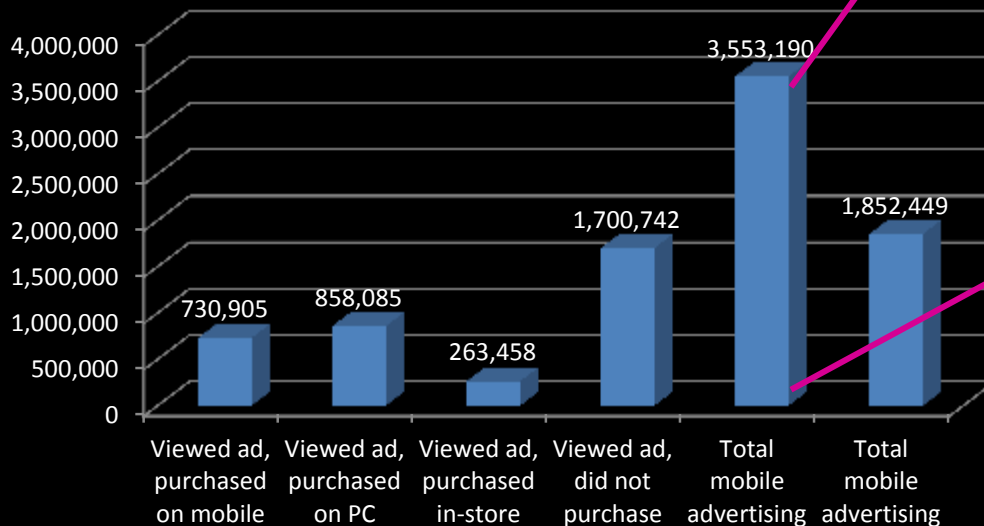
35-44 yo's represent:

- 23% of mobad purchasers
- 24% of viewed ad, purchased on PC
- 12% of driven in-store
- 23% of total mobile advertising reach

Mobile advertising reach for 35-44, by region



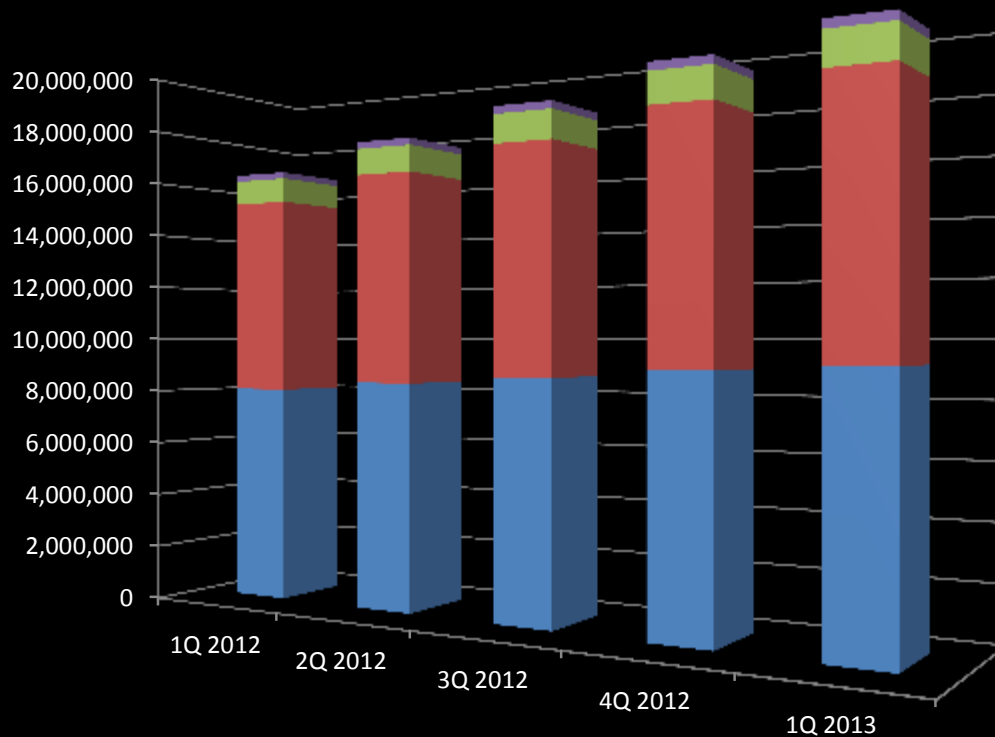
Advertising to mobile users aged 35-44



Monetisation

19.8 million m-commerce users by end-2012

M-commerce users



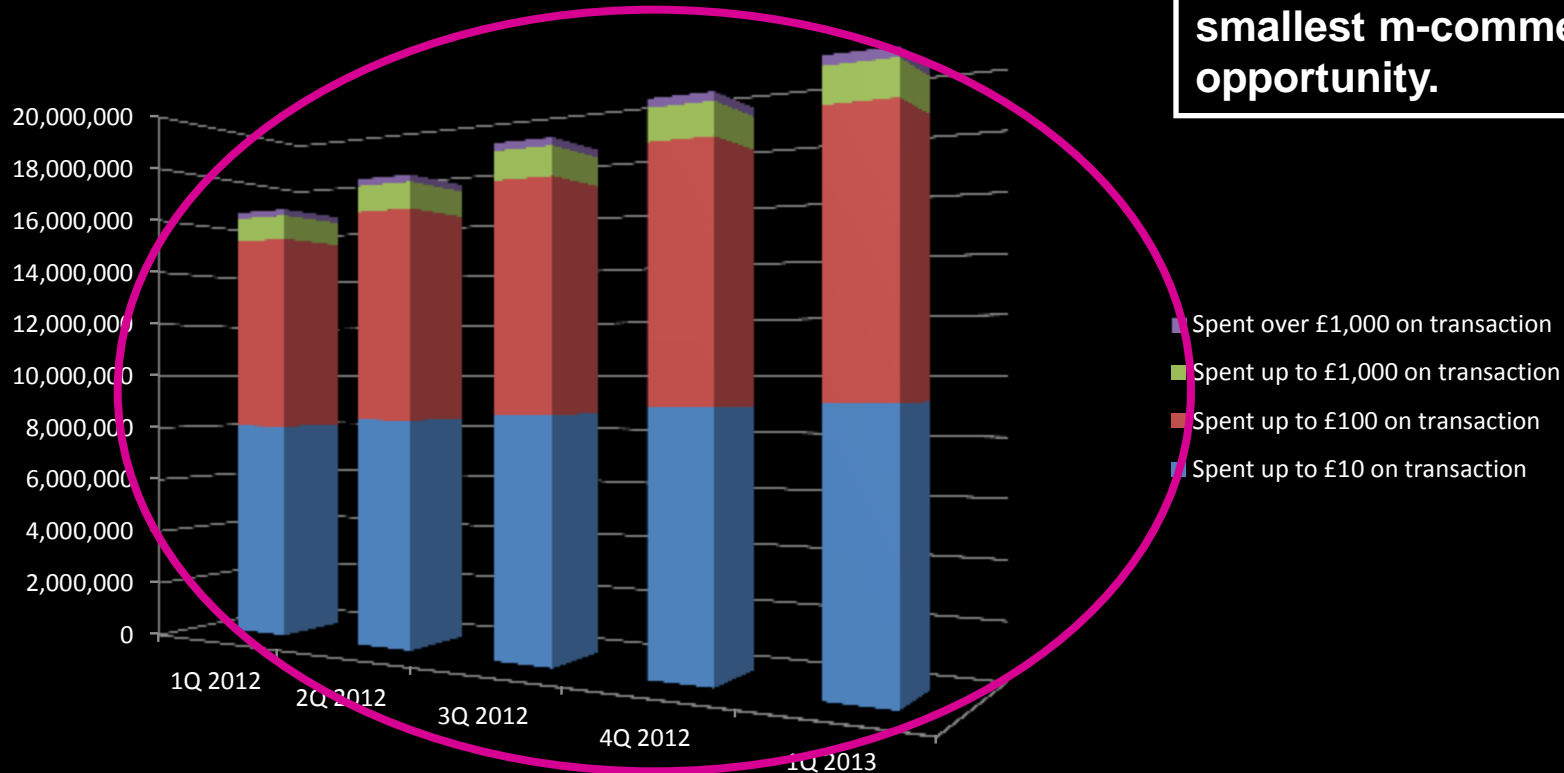
There are more m-commerce users than mobile advertising users

- Spent over £1,000 on transaction
- Spent up to £1,000 on transaction
- Spent up to £100 on transaction
- Spent up to £10 on transaction

FMCG monetisation

FMCG target audience of 20 million in 1Q2013

M-commerce users



35-44 yo's represent largest m-commerce <£10 user (4.1 million), followed by 45-54 yo's.

18-25 yo's represent the smallest m-commerce opportunity.

FMCG mobile landscape

Present

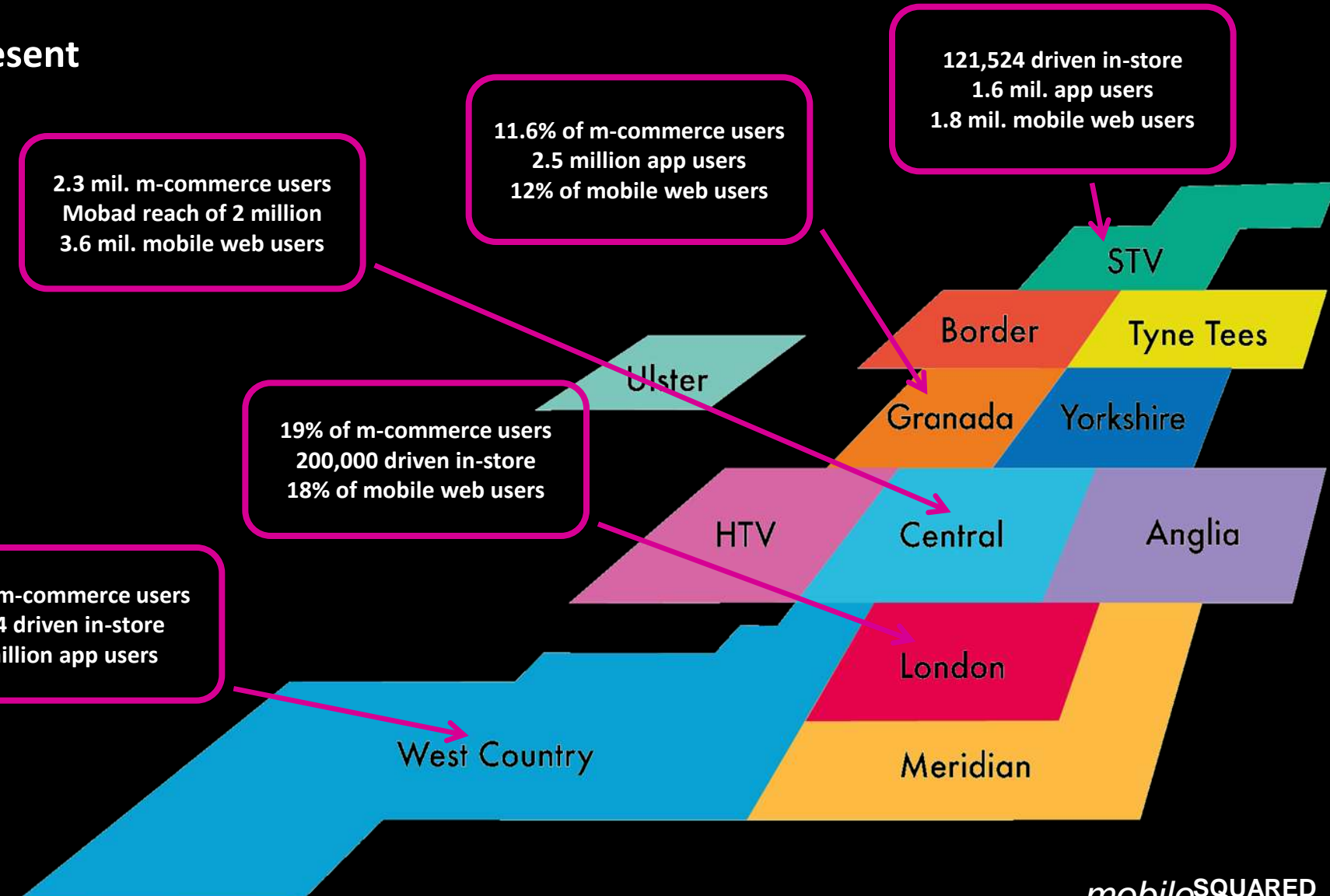
2.3 mil. m-commerce users
Mobad reach of 2 million
3.6 mil. mobile web users

11.6% of m-commerce users
2.5 million app users
12% of mobile web users

121,524 driven in-store
1.6 mil. app users
1.8 mil. mobile web users

19% of m-commerce users
200,000 driven in-store
18% of mobile web users

6.7% of m-commerce users
68,324 driven in-store
1.6 million app users



Conclusion

FMCG opportunity in UK reaches 20 million mobile users in 12 months

Mobile advertising “effectively” reach 10 million =

Cross-mobile strategy (web, app, adv, & marketing)

Use mobile interaction & engagement to develop consumer relationships

Become a service

Think long term!

Nick Lane

Chief strategy analyst

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