



Mobile Internet Usage in Europe and the US, 2011 [Abridged version]

Table of Contents

Executive Summary 12

Methodology 16

France..... 18

Germany 32

Italy 46

Netherlands 60

Spain 74

UK..... 88

Europe 102

US..... 111

Survey Questions 125

Table of Tables and Figures

Figure 1-1. All countries: Average number of connected devices owned 13

Figure 1-2. All countries: Number of respondents with "no need" for stated services 14

Figure 1-3. UK: Mobile IM (July 2010 survey) 15

Figure 1-4. UK: Mobile IM (May 2011 survey) 15

Table 2-1. Survey respondents by age and gender 17

Figure 3-1. France: Phone brand by age 21

Figure 3-2. France: Phone brand by gender and contract type 21

Figure 3-3. France: Engagement by phone brand (A-N) 21

Figure 3-4. France: Engagement by phone brand (O-Z) 21

Figure 3-5. France: Engagement by phone brand (communications) 22

Figure 3-6. France: Engagement by phone brand (content) 22

Figure 3-7. France: Engagement by phone brand (information) 22

Figure 3-8. France: Engagement by phone brand (entertainment) 22

Figure 3-9. France: Operator by age 23

Figure 3-10. France: Mobile Wi-Fi usage 23

Figure 3-11. France: Engagement 23

Figure 3-12. France: Engagement by activity 23

Figure 3-13. France: Activities by age (communications) 24

Figure 3-14. France: Activities by age (content) 24

Figure 3-15. France: Activities by age (information) 24

Figure 3-16. France: Activities by age (entertainment) 24

Figure 3-17. France: Mobile social networks 25

Figure 3-18. France: Mobile e-mail 25

Figure 3-19. France: Mobile IM 25

Figure 3-20. France: Number of mobile communications accounts 25

Figure 3-21. France: Social network accounts among tablet owners 26

Figure 3-22. France: Sources of mobile music 26

Figure 3-23. France: Reasons for not listening to mobile music 26

Figure 3-24. France: Interest in unlimited music service 26

Figure 3-25. France: Main source of apps 27

Figure 3-26. France: Average app downloads per month 27

Figure 3-27. France: App type downloaded by age 27

Figure 3-28. France: App type downloaded by gender 27

Figure 3-29. France: Reasons for not downloading apps 28

Figure 3-30. France: Mobile video watching 28

Figure 3-31. France: Reasons for not downloading videos 28

Contents

Figure 3-32. France: Mobile map usage 28

Figure 3-33. France: Attitudes to ad-funded content by age 29

Figure 3-34. France: Preferred ad type by age..... 29

Figure 3-35. France: Other device usage (Web browsing) 29

Figure 3-36. France: Other device usage (video calling) 29

Figure 3-37. France: Other device usage (movie watching)..... 30

Figure 3-38. France: Other device usage (online games)..... 30

Figure 3-39. France: Other device usage (catch-up TV) 30

Figure 3-40. France: Other device usage (social networks)..... 30

Figure 3-41. France: Other device usage (e-mail) 31

Figure 3-42. France: Other device usage (IM) 31

Figure 3-43. France: Other device usage (music)..... 31

Figure 3-44. France: Main desired mobile service 31

Figure 4-1. Germany: Phone brand by age 35

Figure 4-2. Germany: Phone brand by gender and contract type 35

Figure 4-3. Germany: Engagement by phone brand (A-N) 35

Figure 4-4. Germany: Engagement by phone brand (O-Z) 35

Figure 4-5. Germany: Engagement by phone brand (communications) 36

Figure 4-6. Germany: Engagement by phone brand (content)..... 36

Figure 4-7. Germany: Engagement by phone brand (information) 36

Figure 4-8. Germany: Engagement by phone brand (entertainment) 36

Figure 4-9. Germany: Operator by age 37

Figure 4-10. Germany: Mobile Wi-Fi usage..... 37

Figure 4-11. Germany: Engagement 37

Figure 4-12. Germany: Engagement by activity..... 37

Figure 4-13. Germany: Activities by age (communications)..... 38

Figure 4-14. Germany: Activities by age (content) 38

Figure 4-15. Germany: Activities by age (information) 38

Figure 4-16. Germany: Activities by age (entertainment)..... 38

Figure 4-17. Germany: Mobile social networks..... 39

Figure 4-18. Germany: Mobile e-mail 39

Figure 4-19. Germany: Mobile IM 39

Figure 4-20. Germany: Number of mobile communications accounts 39

Figure 4-21. Germany: Social networks accounts among tablet owners 40

Figure 4-22. Germany: Sources of mobile music 40

Figure 4-23. Germany: Reasons for not listening to mobile music 40

Figure 4-24. Germany: Interest in unlimited music service 40

Figure 4-25. Germany: Main source of apps 41

Contents

Figure 4-26. Germany: Average app downloads per month 41

Figure 4-27. Germany: App type downloaded by age 41

Figure 4-28. Germany: App type downloaded by gender 41

Figure 4-29. Germany: Reasons for not downloading apps 42

Figure 4-30. Germany: Mobile video watching 42

Figure 4-31. Germany: Reasons for not downloading videos 42

Figure 4-32. Germany: Mobile map usage 42

Figure 4-33. Germany: Attitudes to ad-funded content by age 43

Figure 4-34. Germany: Preferred ad type by age 43

Figure 4-35. Germany: Other device usage (Web browsing) 43

Figure 4-36. Germany: Other device usage (video calling) 43

Figure 4-37. Germany: Other device usage (movie watching) 44

Figure 4-38. Germany: Other device usage (online games) 44

Figure 4-39. Germany: Other device usage (catch-up TV) 44

Figure 4-40. Germany: Other device usage (social networks) 44

Figure 4-41. Germany: Other device usage (e-mail) 45

Figure 4-42. Germany: Other device usage (IM) 45

Figure 4-43. Germany: Other device usage (music) 45

Figure 4-44. Germany: Main desired mobile service 45

Figure 5-1. Italy: Phone brand by age 49

Figure 5-2. Italy: Phone brand by gender and contract type 49

Figure 5-3. Italy: Engagement by phone brand (A-N) 49

Figure 5-4. Italy: Engagement by phone brand (O-Z) 49

Figure 5-5. Italy: Engagement by phone brand (communications) 50

Figure 5-6. Italy: Engagement by phone brand (content) 50

Figure 5-7. Italy: Engagement by phone brand (information) 50

Figure 5-8. Italy: Engagement by phone brand (entertainment) 50

Figure 5-9. Italy: Operator by age 51

Figure 5-10. Italy: Mobile Wi-Fi usage 51

Figure 5-11. Italy: Engagement 51

Figure 5-12. Italy: Engagement by activity 51

Figure 5-13. Italy: Activities by age (communications) 52

Figure 5-14. Italy: Activities by age (content) 52

Figure 5-15. Italy: Activities by age (information) 52

Figure 5-16. Italy: Activities by age (entertainment) 52

Figure 5-17. Italy: Mobile social networks 53

Figure 5-18. Italy: Mobile e-mail 53

Figure 5-19. Italy: Mobile IM 53

Contents

Figure 5-20. Italy: Number of mobile communications accounts..... 53

Figure 5-21. Italy: Social network accounts among tablet owners..... 54

Figure 5-22. Italy: Sources of mobile music 54

Figure 5-23. Italy: Reasons for not listening to mobile music 54

Figure 5-24. Italy: Interest in unlimited music service 54

Figure 5-25. Italy: Main source of apps..... 55

Figure 5-26. Italy: Average app downloads per month..... 55

Figure 5-27. Italy: App type downloaded by age..... 55

Figure 5-28. Italy: App type downloaded by gender 55

Figure 5-29. Italy: Reasons for not downloading apps 56

Figure 5-30. Italy: Mobile video watching..... 56

Figure 5-31. Italy: Reasons for not downloading videos 56

Figure 5-32. Italy: Mobile map usage 56

Figure 5-33. Italy: Attitudes to ad-funded content by age..... 57

Figure 5-34. Italy: Preferred ad type by age 57

Figure 5-35. Italy: Other device usage (Web browsing)..... 57

Figure 5-36. Italy: Other device usage (video calling) 57

Figure 5-37. Italy: Other device usage (movie watching) 58

Figure 5-38. Italy: Other device usage (online games)..... 58

Figure 5-39. Italy: Other device usage (catch-up TV) 58

Figure 5-40. Italy: Other device usage (social networks)..... 58

Figure 5-41. Italy: Other device usage (e-mail) 59

Figure 5-42. Italy: Other device usage (IM) 59

Figure 5-43. Italy: Other device usage (music)..... 59

Figure 5-44. Italy: Main desired mobile service 59

Figure 6-1. Netherlands: Phone brand by age 63

Figure 6-2. Netherlands: Phone brand by gender and contract type 63

Figure 6-3. Netherlands: Engagement by phone brand (A-N) 63

Figure 6-4. Netherlands: Engagement by phone brand (O-Z) 63

Figure 6-5. Netherlands: Engagement by phone brand (communications)..... 64

Figure 6-6. Netherlands: Engagement by phone brand (content) 64

Figure 6-7. Netherlands: Engagement by phone brand (information) 64

Figure 6-8. Netherlands: Engagement by phone brand (entertainment)..... 64

Figure 6-9. Netherlands: Operator by age 65

Figure 6-10. Netherlands: Mobile Wi-Fi usage..... 65

Figure 6-11. Netherlands: Engagement..... 65

Figure 6-12. Netherlands: Engagement by activity 65

Figure 6-13. Netherlands: Activities by age (communications)..... 66

Contents

Figure 6-14. Netherlands: Activities by age (content) 66

Figure 6-15. Netherlands: Activities by age (information) 66

Figure 6-16. Netherlands: Activities by age (entertainment) 66

Figure 6-17. Netherlands: Mobile social networks 67

Figure 6-18. Netherlands: Mobile e-mail 67

Figure 6-19. Netherlands: Mobile IM 67

Figure 6-20. Netherlands: Number of mobile communications accounts 67

Figure 6-21. Netherlands: Social network accounts among tablet owners 68

Figure 6-22. Netherlands: Sources of mobile music 68

Figure 6-23. Netherlands: Reasons for not listening to mobile music 68

Figure 6-24. Netherlands: Interest in unlimited music service 68

Figure 6-25. Netherlands: Main source of apps..... 69

Figure 6-26. Netherlands: Average app downloads per month 69

Figure 6-27. Netherlands: App type downloaded by age 69

Figure 6-28. Netherlands: App type downloaded by gender 69

Figure 6-29. Netherlands: Reasons for not downloading apps 70

Figure 6-30. Netherlands: Mobile video watching 70

Figure 6-31. Netherlands: Reasons for not downloading videos 70

Figure 6-32. Netherlands: Mobile map usage 70

Figure 6-33. Netherlands: Attitudes to ad-funded content by age..... 71

Figure 6-34. Netherlands: Preferred ad type by age 71

Figure 6-35. Netherlands: Other device usage (Web browsing) 71

Figure 6-36. Netherlands: Other device usage (video calling) 71

Figure 6-37. Netherlands: Other device usage (movie watching) 72

Figure 6-38. Netherlands: Other device usage (online games) 72

Figure 6-39. Netherlands: Other device usage (catch-up TV)..... 72

Figure 6-40. Netherlands: Other device usage (social networks) 72

Figure 6-41. Netherlands: Other device usage (e-mail)..... 73

Figure 6-42. Netherlands: Other device usage (IM) 73

Figure 6-43. Netherlands: Other device usage (music) 73

Figure 6-44. Netherlands: Main desired mobile service 73

Figure 7-1. Spain: Phone brand by age 77

Figure 7-2. Spain: Phone brand by gender and contract type 77

Figure 7-3. Spain: Engagement by phone brand (A-N) 77

Figure 7-4. Spain: Engagement by phone brand (O-Z) 77

Figure 7-5. Spain: Engagement by phone brand (communications)..... 78

Figure 7-6. Spain: Engagement by phone brand (content) 78

Figure 7-7. Spain: Engagement by phone brand (information) 78

Contents

Figure 7-8. Spain: Engagement by phone brand (entertainment) 78

Figure 7-9. Spain: Operator by age..... 79

Figure 7-10. Spain: Mobile Wi-Fi usage 79

Figure 7-11. Spain: Engagement 79

Figure 7-12. Spain: Engagement by activity 79

Figure 7-13. Spain: Activities by age (communications) 80

Figure 7-14. Spain: Activities by age (content) 80

Figure 7-15. Spain: Activities by age (information) 80

Figure 7-16. Spain: Activities by age (entertainment) 80

Figure 7-17. Spain: Mobile social networks 81

Figure 7-18. Spain: Mobile e-mail 81

Figure 7-19. Spain: Mobile IM 81

Figure 7-20. Spain: Number of mobile communications accounts..... 81

Figure 7-21. Spain: Social network accounts among tablet owners..... 82

Figure 7-22. Spain: Sources of mobile music 82

Figure 7-23. Spain: Reasons for not listening to mobile music 82

Figure 7-24. Spain: Interest in unlimited music service 82

Figure 7-25. Spain: Main source of apps..... 83

Figure 7-26. Spain: Average app downloads per month..... 83

Figure 7-27. Spain: App type downloaded by age..... 83

Figure 7-28. Spain: App type downloaded by gender 83

Figure 7-29. Spain: Reasons for not downloading apps 84

Figure 7-30. Spain: Mobile video watching..... 84

Figure 7-31. Spain: Reasons for not downloading videos 84

Figure 7-32. Spain: Mobile map usage 84

Figure 7-33. Spain: Attitudes to ad-funded content by age..... 85

Figure 7-34. Spain: Preferred ad type by age 85

Figure 7-35. Spain: Other device usage (Web browsing)..... 85

Figure 7-36. Spain: Other device usage (video calling) 85

Figure 7-37. Spain: Other device usage (movie watching) 86

Figure 7-38. Spain: Other device usage (online games) 86

Figure 7-39. Spain: Other device usage (catch-up TV)..... 86

Figure 7-40. Spain: Other device usage (social networks)..... 86

Figure 7-41. Spain: Other device usage (e-mail)..... 87

Figure 7-42. Spain: Other device usage (IM)..... 87

Figure 7-43. Spain: Other device usage (music)..... 87

Figure 7-44. Spain: Main desired mobile service..... 87

Figure 8-1. UK: Phone brand by age 91

Contents

Figure 8-2. UK: Phone brand by gender and contract type 91

Figure 8-3. UK: Engagement by phone brand (A-N) 91

Figure 8-4. UK: Engagement by phone brand (O-Z) 91

Figure 8-5. UK: Engagement by phone brand (communications) 92

Figure 8-6. UK: Engagement by phone brand (content) 92

Figure 8-7. UK: Engagement by phone brand (information) 92

Figure 8-8. UK: Engagement by phone brand (entertainment) 92

Figure 8-9. UK: Operator by age 93

Figure 8-10. UK: Mobile Wi-Fi usage 93

Figure 8-11. UK: Engagement 93

Figure 8-12. UK: Engagement by activity 93

Figure 8-13. UK: Activities by age (communications) 94

Figure 8-14. UK: Activities by age (content) 94

Figure 8-15. UK: Activities by age (information) 94

Figure 8-16. UK: Activities by age (entertainment) 94

Figure 8-17. UK: Mobile social networks 95

Figure 8-18. UK: Mobile e-mail 95

Figure 8-19. UK: Mobile IM 95

Figure 8-20. UK: Number of mobile communications accounts 95

Figure 8-21. UK: Social network accounts among tablet owners 96

Figure 8-22. UK: Sources of mobile music 96

Figure 8-23. UK: Reasons for not listening to mobile music 96

Figure 8-24. UK: Interest in unlimited music service 96

Figure 8-25. UK: Main source of apps 97

Figure 8-26. UK: Average app downloads per month 97

Figure 8-27. UK: App type downloaded by age 97

Figure 8-28. UK: App type downloaded by gender 97

Figure 8-29. UK: Reasons for not downloading apps 98

Figure 8-30. UK: Mobile video watching 98

Figure 8-31. UK: Reasons for not downloading videos 98

Figure 8-32. UK: Mobile map usage 98

Figure 8-33. UK: Attitudes to ad-funded content by age 99

Figure 8-34. UK: Preferred ad type by age 99

Figure 8-35. UK: Other device usage (Web browsing) 99

Figure 8-36. UK: Other device usage (video calling) 99

Figure 8-37. UK: Other device usage (movie watching) 100

Figure 8-38. UK: Other device usage (online games) 100

Figure 8-39. UK: Other device usage (catch-up TV) 100

Contents

Figure 8-40. UK: Other device usage (social networks) 100

Figure 8-41. UK: Other device usage (e-mail) 101

Figure 8-42. UK: Other device usage (IM) 101

Figure 8-43. UK: Other device usage (music) 101

Figure 8-44. UK: Main desired mobile service 101

Figure 9-1. Europe: Phone brands 104

Figure 9-2. Europe: Engagement by phone brand (A-N) 104

Figure 9-3. Europe: Engagement by phone brand (O-Z) 104

Figure 9-4. Europe: Engagement by phone brand (communications) 104

Figure 9-5. Europe: Engagement by phone brand (content) 105

Figure 9-6. Europe: Engagement by phone brand (information) 105

Figure 9-7. Europe: Engagement by phone brand (entertainment) 105

Figure 9-8. Europe: Mobile and home Wi-Fi usage 105

Figure 9-9. Europe: Engagement 106

Figure 9-10. Europe: Engagement by activity 106

Figure 9-11. Europe: Source of mobile music in 12 months 106

Figure 9-13. Europe: Europe: Average app downloads per month 107

Figure 9-14. Europe: Mobile video watching 107

Figure 9-15. Europe: Mobile map usage 107

Figure 9-16. Europe: Attitudes to ad-funded content 107

Figure 9-17. Europe: Main Web browsing device in 12 months 108

Figure 9-18. Europe: Main video calling device in 12 months 108

Figure 9-19. Europe: Main movie watching device in 12 months 108

Figure 9-20. Europe: Main online games device in 12 months 108

Figure 9-21. Europe: Main catch-up TV device in 12 months 109

Figure 9-22. Europe: Main social networks device in 12 months 109

Figure 9-23. Europe: Main e-mail device in 12 months 109

Figure 9-24. Europe: Main IM device in 12 months 109

Figure 9-25. Europe: Main music device in 12 months 110

Figure 9-26. Europe: Main desired mobile service 110

Figure 10-1. US: Phone brand by age 114

Figure 10-2. US: Phone brand by gender and contract type 114

Figure 10-3. US: Engagement by phone brand (A-N) 114

Figure 10-4. US: Engagement by phone brand (O-Z) 114

Figure 10-5. US: Engagement by phone brand (communications) 115

Figure 10-6. US: Engagement by phone brand (content) 115

Figure 10-7. US: Engagement by phone brand (information) 115

Figure 10-8. US: Engagement by phone brand (entertainment) 115

Contents

Figure 10-9. US: Operator by age..... 116

Figure 10-10. US: Mobile Wi-Fi usage 116

Figure 10-11. US: Engagement 116

Figure 10-12. US: Engagement by activity 116

Figure 10-13. US: Activities by age (communications) 117

Figure 10-14. US: Activities by age (content) 117

Figure 10-15. US: Activities by age (information) 117

Figure 10-16. US: Activities by age (entertainment) 117

Figure 10-17. US: Mobile social networks 118

Figure 10-18. US: Mobile e-mail 118

Figure 10-19. US: Mobile IM 118

Figure 10-20. US: Number of mobile communications accounts..... 118

Figure 10-21. US: Social network accounts among tablet owners..... 119

Figure 10-22. US: Sources of mobile music 119

Figure 10-23. US: Reasons for not listening to mobile music 119

Figure 10-24. US: Interest in unlimited music service 119

Figure 10-25. US: Main source of apps..... 120

Figure 10-26. US: Average app downloads per month..... 120

Figure 10-27. US: App type downloaded by age..... 120

Figure 10-28. US: App type downloaded by gender 120

Figure 10-29. US: Reasons for not downloading apps 121

Figure 10-30. US: Mobile video watching..... 121

Figure 10-31. US: Reasons for not downloading videos 121

Figure 10-32. US: Mobile map usage 121

Figure 10-33. US: Attitudes to ad-funded content by age 122

Figure 10-34. US: Preferred ad type by age 122

Figure 10-35. US: Other device usage (Web browsing)..... 122

Figure 10-36. US: Other device usage (video calling) 122

Figure 10-37. US: Other device usage (movie watching) 123

Figure 10-38. US: Other device usage (online games)..... 123

Figure 10-39. US: Other device usage (catch-up TV) 123

Figure 10-40. US: Other device usage (social networks)..... 123

Figure 10-41. US: Other device usage (e-mail)..... 124

Figure 10-42. US: Other device usage (IM) 124

Figure 10-43. US: Other device usage (music)..... 124

Figure 10-44. US: Main desired mobile service..... 124

Section 1

Executive Summary

Executive Summary

This is the latest in CCS Insight's series of mobile Internet user surveys. We have expanded our coverage to include the Netherlands, as well as the largest five markets in Europe and the US as before.

Although most of the questions in this survey were about usage of mobile phones, we also focused on the mix of connected devices that people own, and the services they use on them. This was to understand the device landscape as multi-device services, such as Google Docs, Amazon Music service and Evernote, start to become mainstream with the launch of Apple's iCloud and the rapid growth of the tablet market. We also looked at understanding usage of 3G and Wi-Fi with devices. And thirdly we explored attitudes to the different types of advertising people may receive on their devices.

In line with previous surveys, we found the similarities in behaviour across countries are stronger than the differences, even though supply-side conditions are, of course, different.

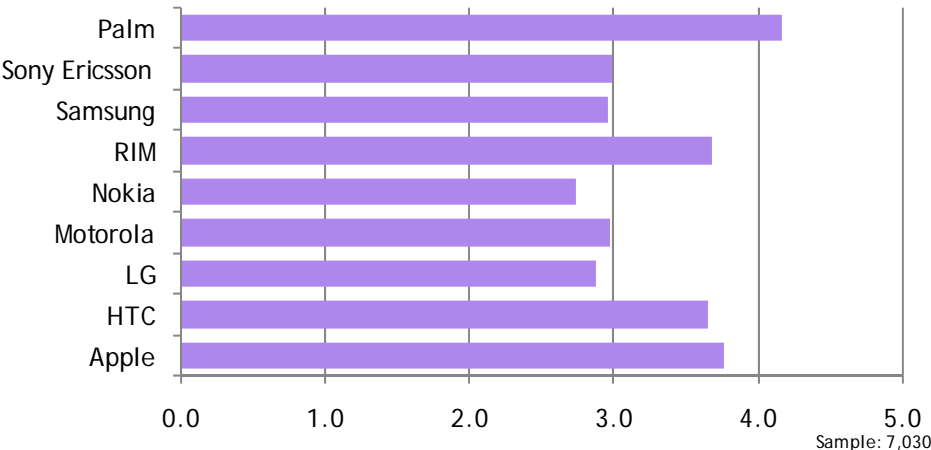
There is growing evidence that the middle age group, the 24-to-35s, are the most attractive segment (as opposed to the youth market, which has been the target of so much innovation and marketing in the mobile industry). This is because they are tech-savvy, have more money and are willing to spend on a range of devices and services. They lead the way in device ownership and in some areas of activity.

Having said that, we found that users across the board continue to grow into their smartphones. Overall levels of engagement are higher than we have seen before, although Germany and the Netherlands stand out as countries with lower levels of engagement and usage. The higher engagement is especially true in the older age group, who have been slower to adopt but who are now raising their usage levels. They also show a clear difference in their preference for content and media ownership, rather than streaming.

Overall we found that PCs are the primary device for consuming most services and for loading content onto mobile phones. Some 70 percent to 80 percent of respondents have the PC as their main source of music, device for e-mail, instant messaging (IM), browsing, social networking, catch-up TV, video calling and online gaming. However, there are signs of this changing, with typically around 10 percent fewer people expecting the PC will be their main device for these in 12 months' time. They expect their use of communications services such as social networking, e-mail and IM to shift to mobile phones and tablets, while use of video-based services will move to tablets and connected TVs.

Unsurprisingly, smartphone owners continue to be the most engaged with content, apps and Internet services. Palm, iPhone, BlackBerry and HTC owners show consistently higher scores in these areas. They are also likely to own more connected devices than other users, as shown in Figure 1-1.

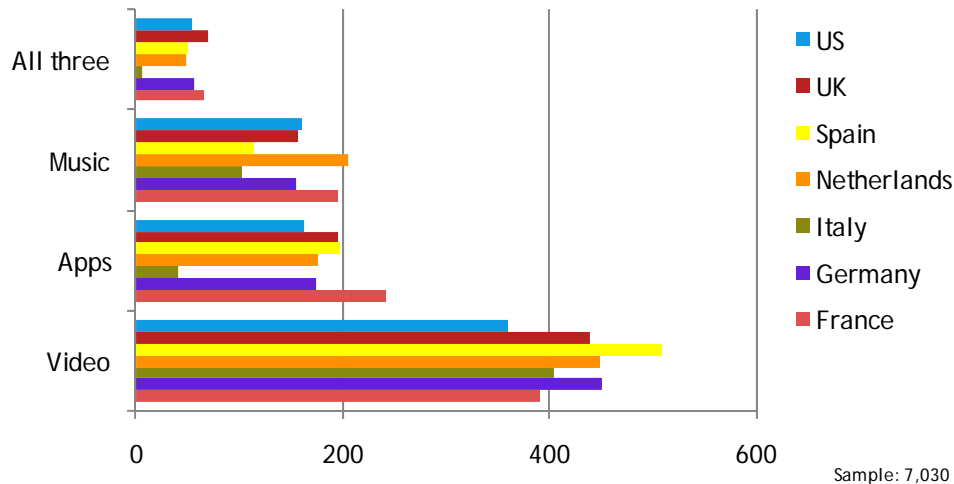
Figure 1-1. All countries: Average number of connected devices owned



Section 1. Executive Summary

In the last survey we looked at the people who gave "no need" as the reason for not using music, video and apps. We found that the proportion who said they do not need all three was small – only 6 percent of all respondents. This time we found between 5 percent and 7 percent across most countries (Italy is lower) saying they need none of these advanced services on their mobile phone, as shown in Figure 1-2.

Figure 1-2. All countries: Number of respondents with "no need" for stated services



We have discussed this finding with manufacturers and operators and we firmly believe it points to a true mass market for phones that deliver a "smartphone experience". Many of those will of course be true smartphones based on an open operating system, however we see potential for other platforms, such as Samsung's Bada and Nokia's Series 40, to play a role by enabling app downloads, browsing and other services even if they are not strictly smartphones.

The use of Wi-Fi is significant. Nearly 40% of respondents have Wi-Fi in their phone and connect to their Wi-Fi network at home. One-sixth to one-third actively look for Wi-Fi connections when they're out and about. Encouragingly, only a few percent of respondents in most countries say that they either don't know about 3G and Wi-Fi, or don't use Wi-Fi because they do not find it easy to use. This is good news for operators looking to offload traffic from their 3G and 4G networks, but it also sounds a warning that users are aware of the substitution offered by Wi-Fi and it adds to pressure on operators in designing data tariffs.

Facebook recently announced a corporate shift to focusing on activity rather than on user numbers and our survey shows that this is entirely sensible. Facebook is already the dominant social network used across all the countries we surveyed and it appears to be starting to put pressure on local social networks, as happened with MySpace in the US. Tuenti in Spain, for example, is less popular in this run of the survey than we saw last time. More than that, Facebook has become either the number-one or number-two service on mobile phones for photos, e-mail and IM (even though this feature has existed for less than a year in Facebook apps). This is illustrated with UK data in Figures 1-3 and 1-4, and the pattern is similar across countries. This represents a sudden and major threat to existing providers such as Microsoft, Google, Skype and Yahoo, as well as to the mobile operators' SMS and MMS services.

Section 1. Executive Summary

Figure 1-3. UK: Mobile IM (July 2010 survey)

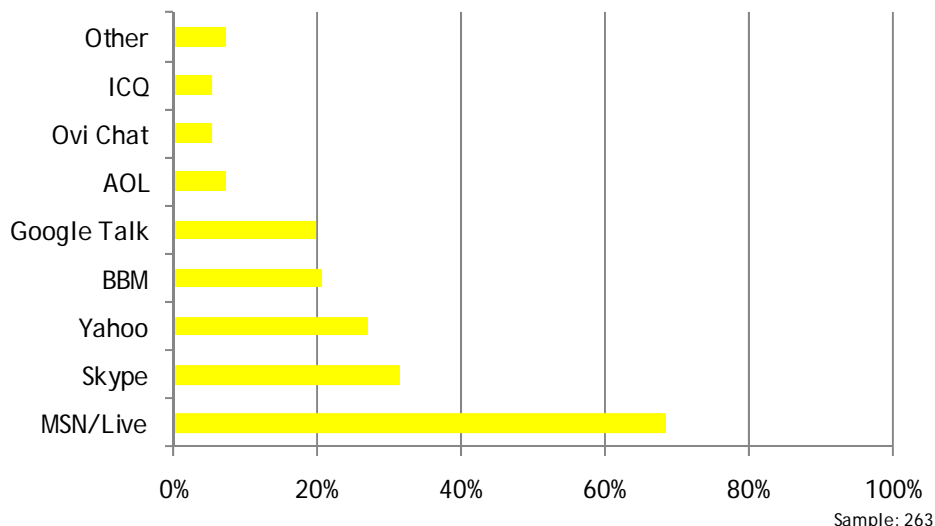
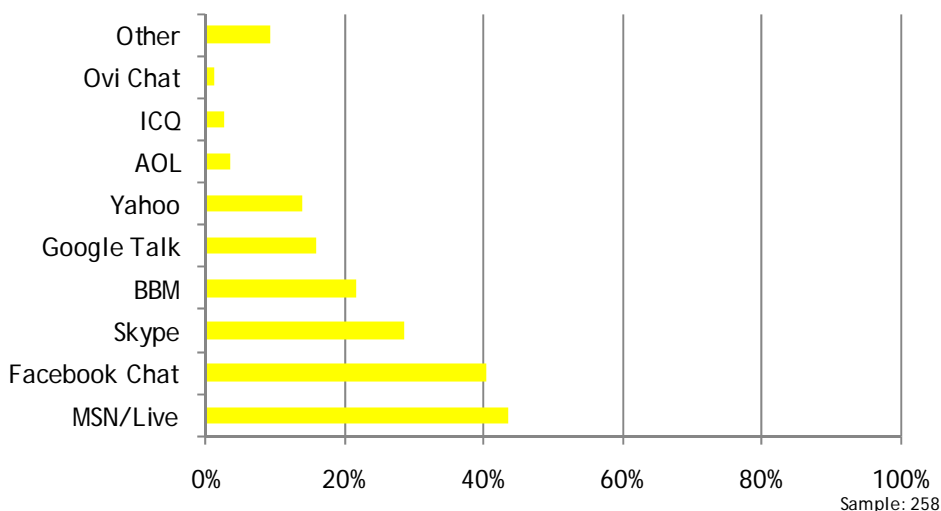


Figure 1-4. UK: Mobile IM (May 2011 survey)



We expect strong growth of video consumption on Facebook to be one of the main drivers (along with YouTube) of overall growth in video traffic during the next 12 months. This is something we flagged in the previous survey as very dangerous for mobile network operators, as there is no additional revenue attached.

Interestingly, we found that the average number of social networks used on mobile devices has risen from 2.0 to 2.2. Tablet owners use a broader range of social networks on their mobile devices. We expect to see tablets encouraging wider usage of Web-based services more generally and being one of the primary drivers of services that work across devices.

The top level finding on advertising is that on average half of respondents do not want advertising services on their phone, with a bias toward the older age groups and high variation across countries (somewhat higher willingness in Italy and the US, somewhat lower willingness in the Netherlands). The most acceptable types of advert are banner and text ads, though not by a large margin over pictures, videos, in-app and ads before a call. Within the content categories, music stands out as the service for which people are most willing to accept advertising. This is echoed by the fact that unlimited music (with a strong preference for downloads over streaming) continues to show through as the most common service people would like to see in future.

Section 2

Methodology

Methodology

This report is based on primary research conducted by CCS Insight with a total of 7,030 participants in five markets in Europe (France, Germany, Italy, the Netherlands, Spain and the UK) and in the US. Respondents were drawn from a panel of 16- to 50-year-old mobile phone owners who had previously indicated they were willing to answer survey questions.

The questions were drawn up by CCS Insight's research team and distributed by an independent market research agency. Respondents completed the survey online in May 2011. An appendix at the end of this report reproduces questions and possible answers.

The survey was structured so that certain answers prompted further questions. For example, only respondents who indicated they listened to music on their phones were asked about potential sources of music.

Questions were asked in local languages, and potential answers were tailored to local preferences. For example, questions about social network services referred to the most popular sites in each country. In France, Germany, Italy, the Netherlands and Spain, questions about payments were set in euros; those in the UK, in pounds; and those in the US, in dollars.

We believe a sample of 1,000 respondents gives a margin of error of plus or minus 3 percent. Table 2-1 breaks down our samples by age and gender. Many of the charts in this report refer to a subset of respondents, according to applicability. Each chart indicates the sample size involved.

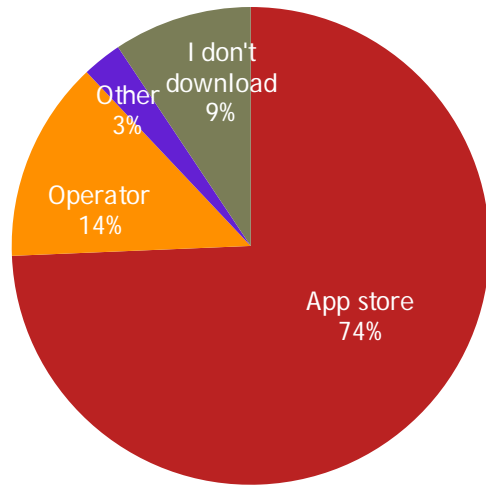
Please note that for the purposes of this report, the term "Europe" in section and chart titles refers to the six countries surveyed, not the whole European region.

Table 2-1. Survey respondents by age and gender

Country	Total	Male	Female	Age 16 to 24	Age 25 to 34	Age 35 to 50
France	1,000	487	513	322	338	340
Germany	1,000	495	505	325	340	335
Italy	1,003	496	507	318	346	339
Netherlands	1,002	496	506	326	338	338
Spain	1,002	499	503	333	334	335
UK	1,006	500	506	332	336	338
US	1,017	512	505	332	334	351

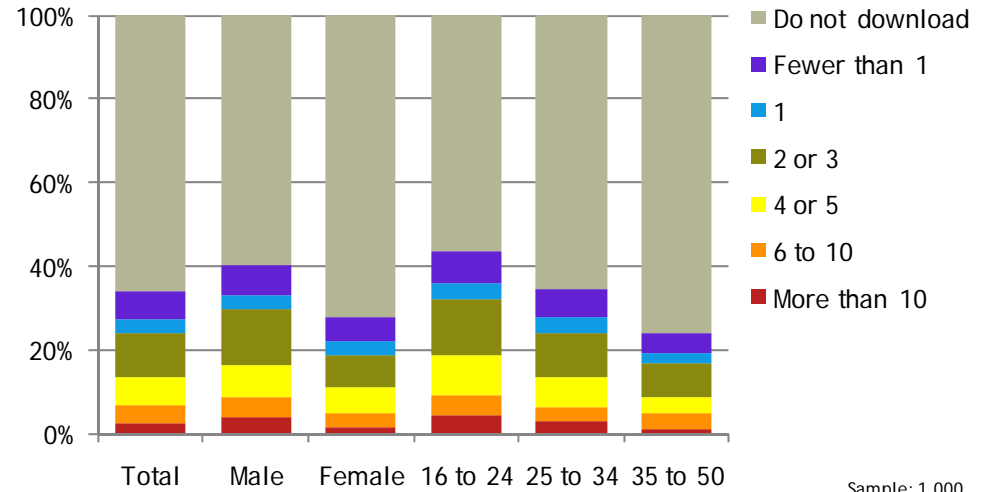
Section 3. France

Figure 3-25. France: Main source of apps



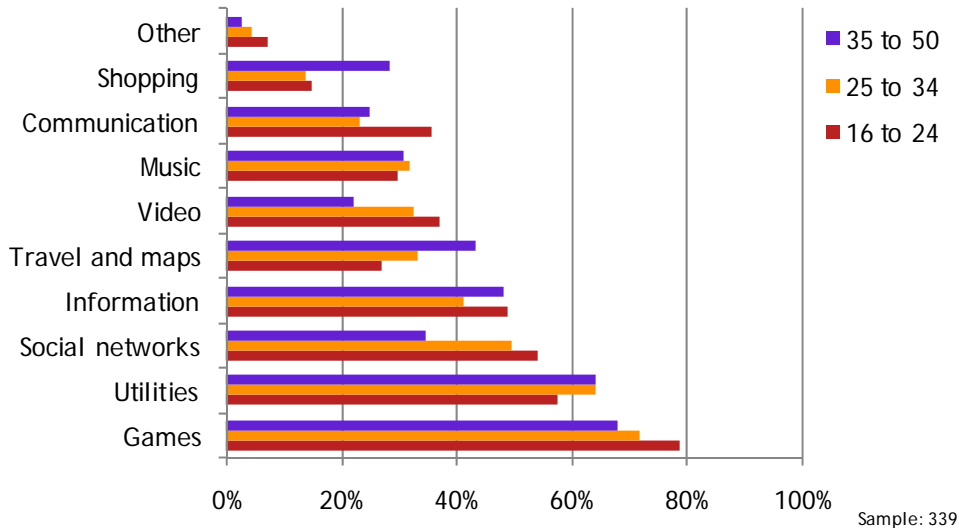
Sample: 374

Figure 3-26. France: Average app downloads per month



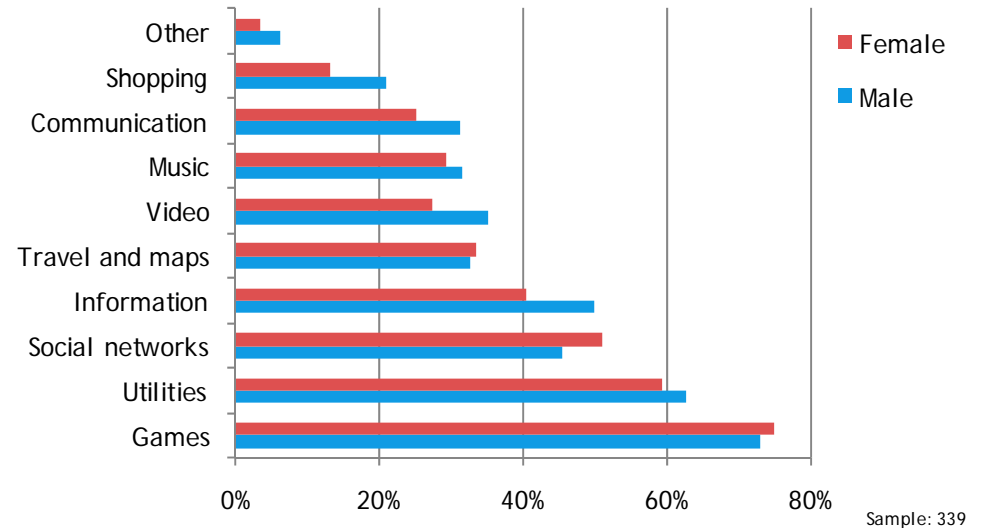
Sample: 1,000

Figure 3-27. France: App type downloaded by age



Sample: 339

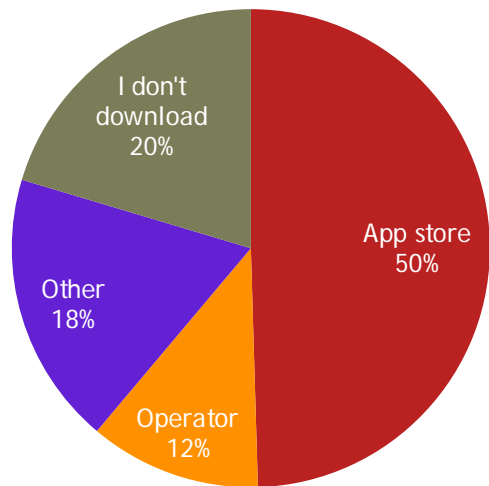
Figure 3-28. France: App type downloaded by gender



Sample: 339

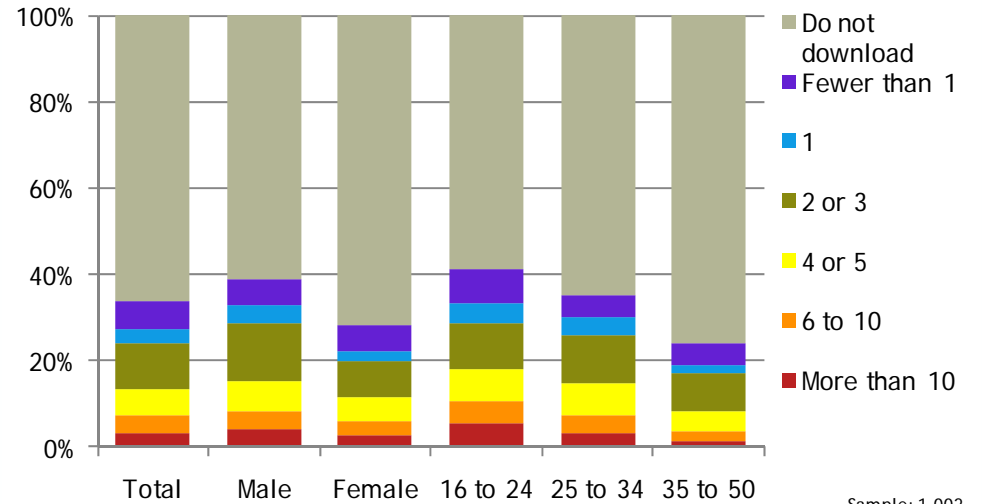
Section 7. Spain

Figure 7-25. Spain: Main source of apps



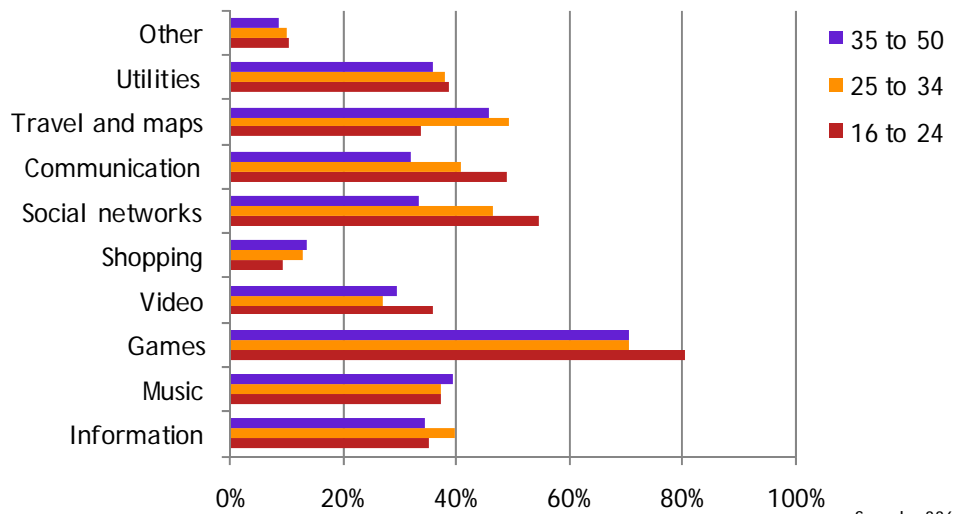
Sample: 422

Figure 7-26. Spain: Average app downloads per month



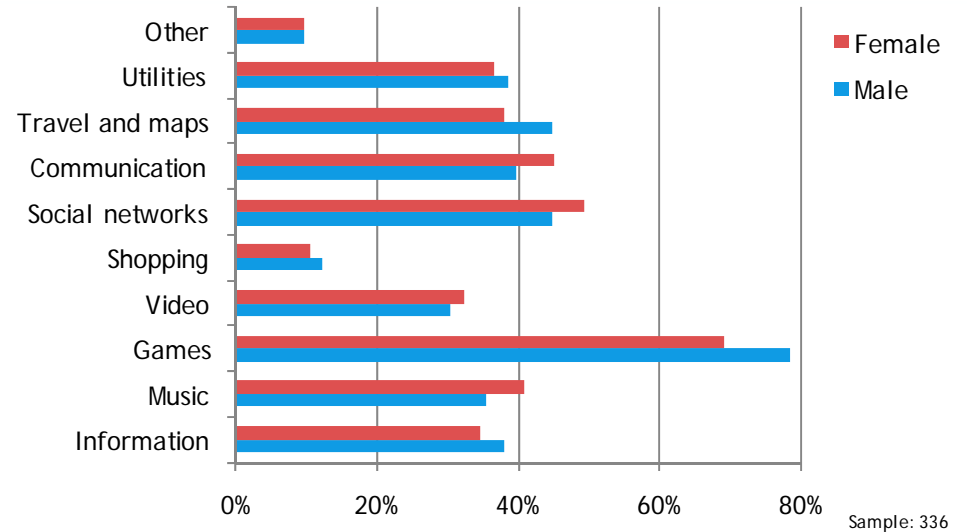
Sample: 1,002

Figure 7-27. Spain: App type downloaded by age



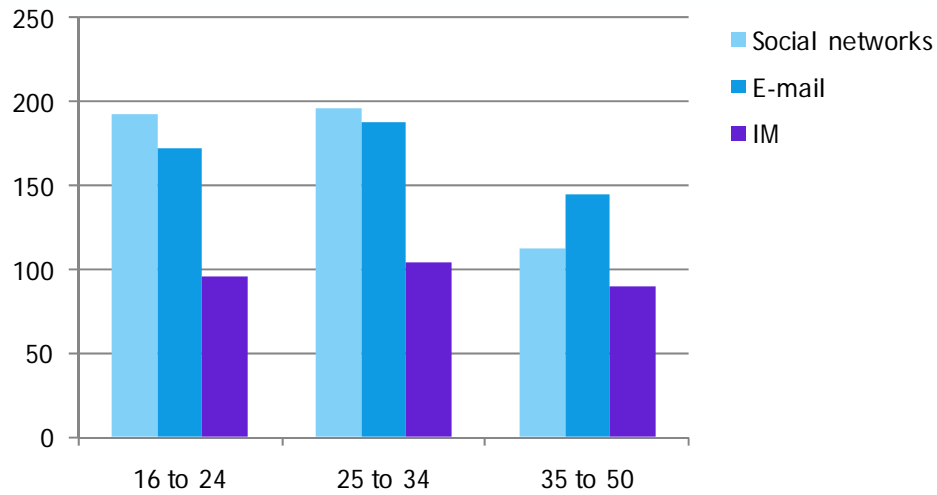
Sample: 336

Figure 7-28. Spain: App type downloaded by gender



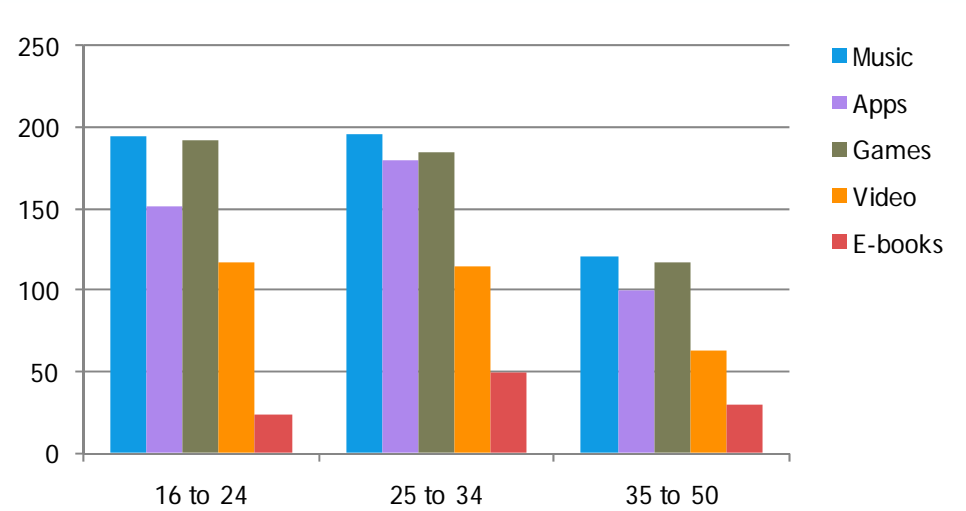
Sample: 336

Figure 10-13. US: Activities by age (communications)



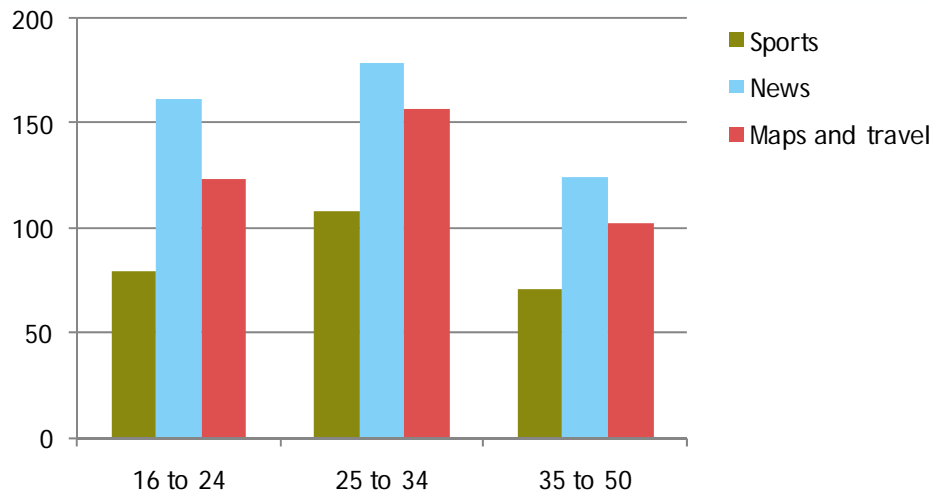
Sample: 1,017

Figure 10-14. US: Activities by age (content)



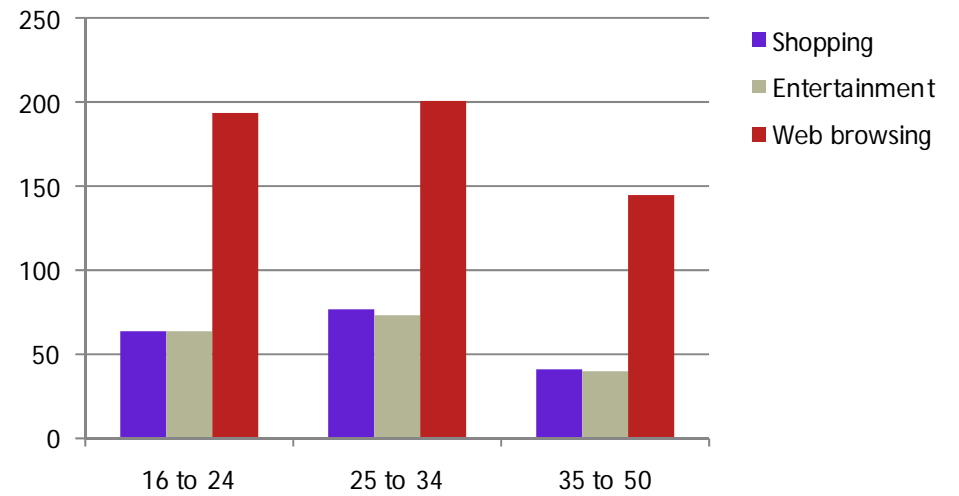
Sample: 1,017

Figure 10-15. US: Activities by age (information)



Sample: 1,017

Figure 10-16. US: Activities by age (entertainment)



Sample: 1,017