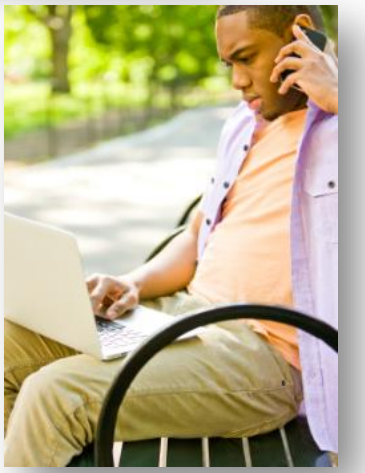

redc

The Smartphone Era:

The impact on the way we live and the implications for Advertising

goldenpages.ie

As mobile technology moves into the grasp of ever-growing numbers of global citizens, how is this trend impacting the way we live?

From the mundane to the aspirational, what are the expectations, hopes and realized uses of mobile technology, worldwide?

To address these questions, a research study was jointly undertaken by the GSMA and WIN-GIA, with survey data collected from October 2012 through January 2013.

MOBILE WORLD CONGRESS
Barcelona | 25 - 28 February 2013

WIN Worldwide Independent Network Of Market Research
GALLUP INTERNATIONAL

Global Results covering 54 countries and 54,121 surveys representing Europe, Africa, Asia, Oceania and the Americas

MOBILE WORLD CONGRESS
Barcelona | 25 - 28 February 2013

Global
N=54,121 / N=51,036 Mobile Users
2,502 Million Adults

Local Results covering Ireland

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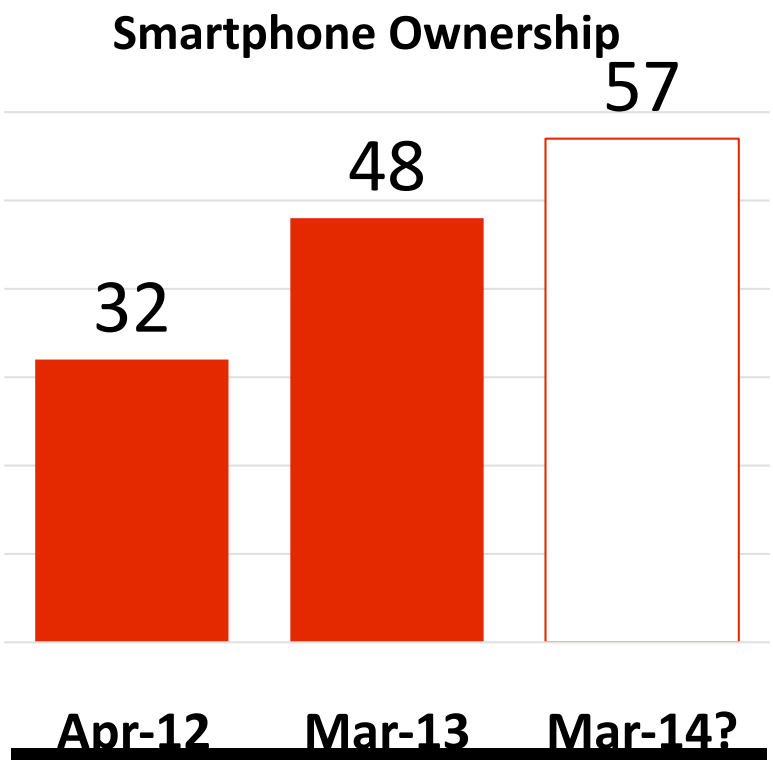
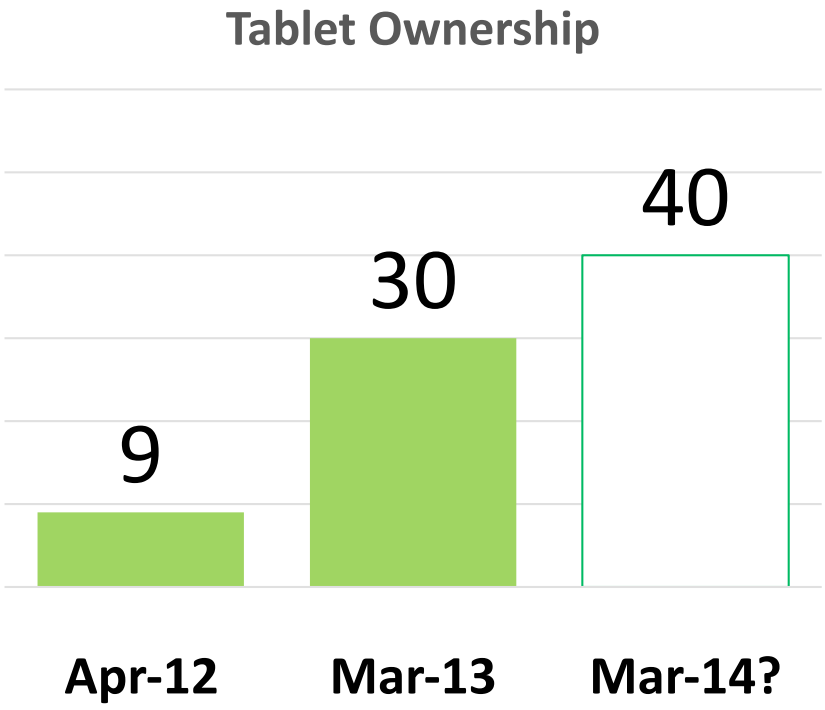
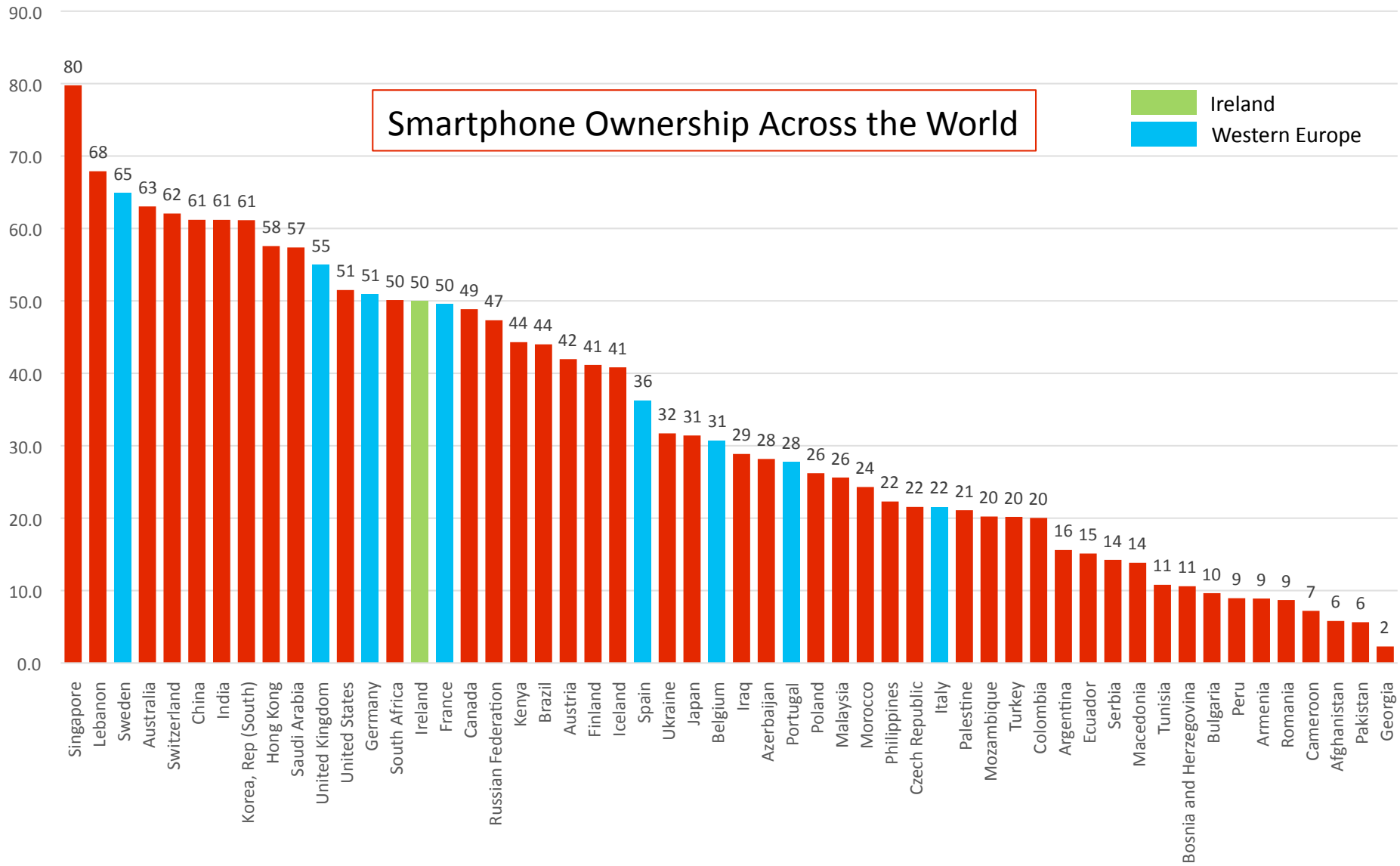
The Rise of Mobile Technology Ownership in Ireland





Smartphone Ownership in Ireland is significantly ahead of other major European Countries including Spain, Belgium, Portugal and Italy

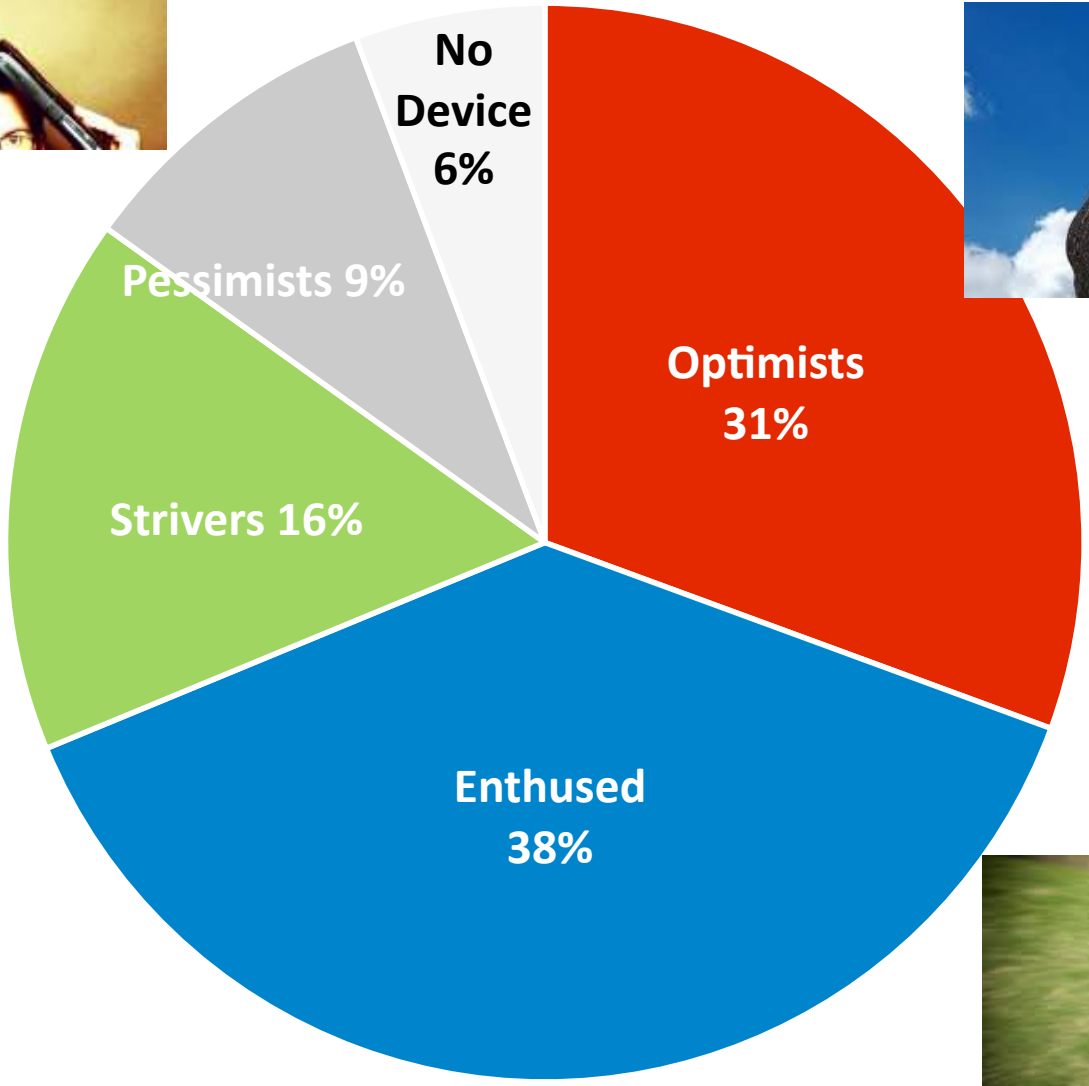


Segmentation by Impact of Mobile on Life.

We segmented the survey data from mobile device users based on attitudes captured in the survey, mainly from a question battery designed to map to a "Mobile Maslow's Hierarchy of Needs".

Ex. How strongly do you feel that your mobile device enables you to:

Four Global Mobile Segments Represented



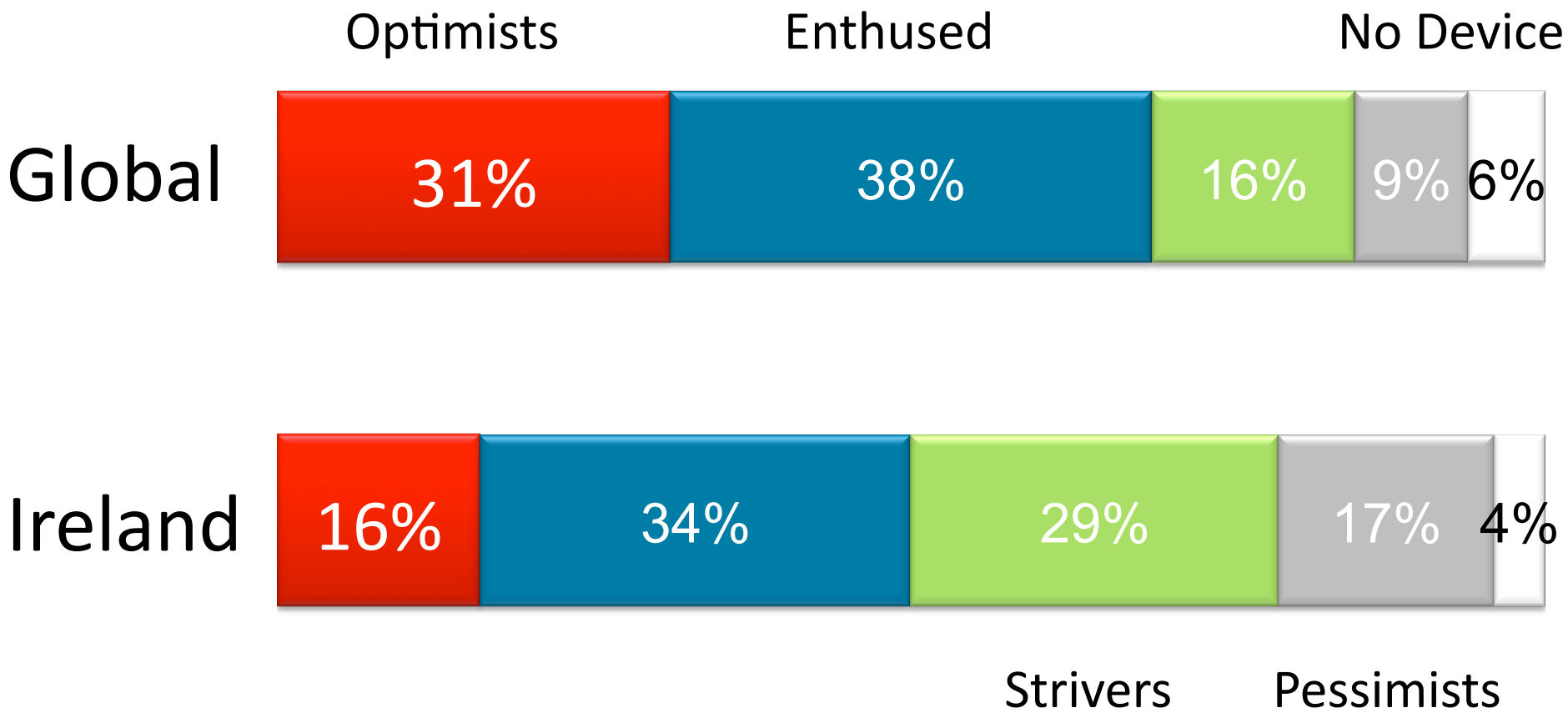
Global
N=54,121 / N=51,036 Mobile Users
2,502 Million Adults

My Mobile Device Enables Me To …

	Optimists 31%	Enthused 38%	Strivers 16%	Pessimists 9%
Complete Daily Chores	89%	46%	48%	8%
Better Socialize	92%	61%	61%	28%
Learn Valuable Things	91%	45%	18%	3%
Acquire Knowledge	93%	53%	27%	5%
Achieve My Potential at Work	88%	40%	28%	3%
Achieve My Potential in Life	88%	29%	14%	2%

Global
N=54,121 / N=51,036 Mobile Users
2,502 Million Adults

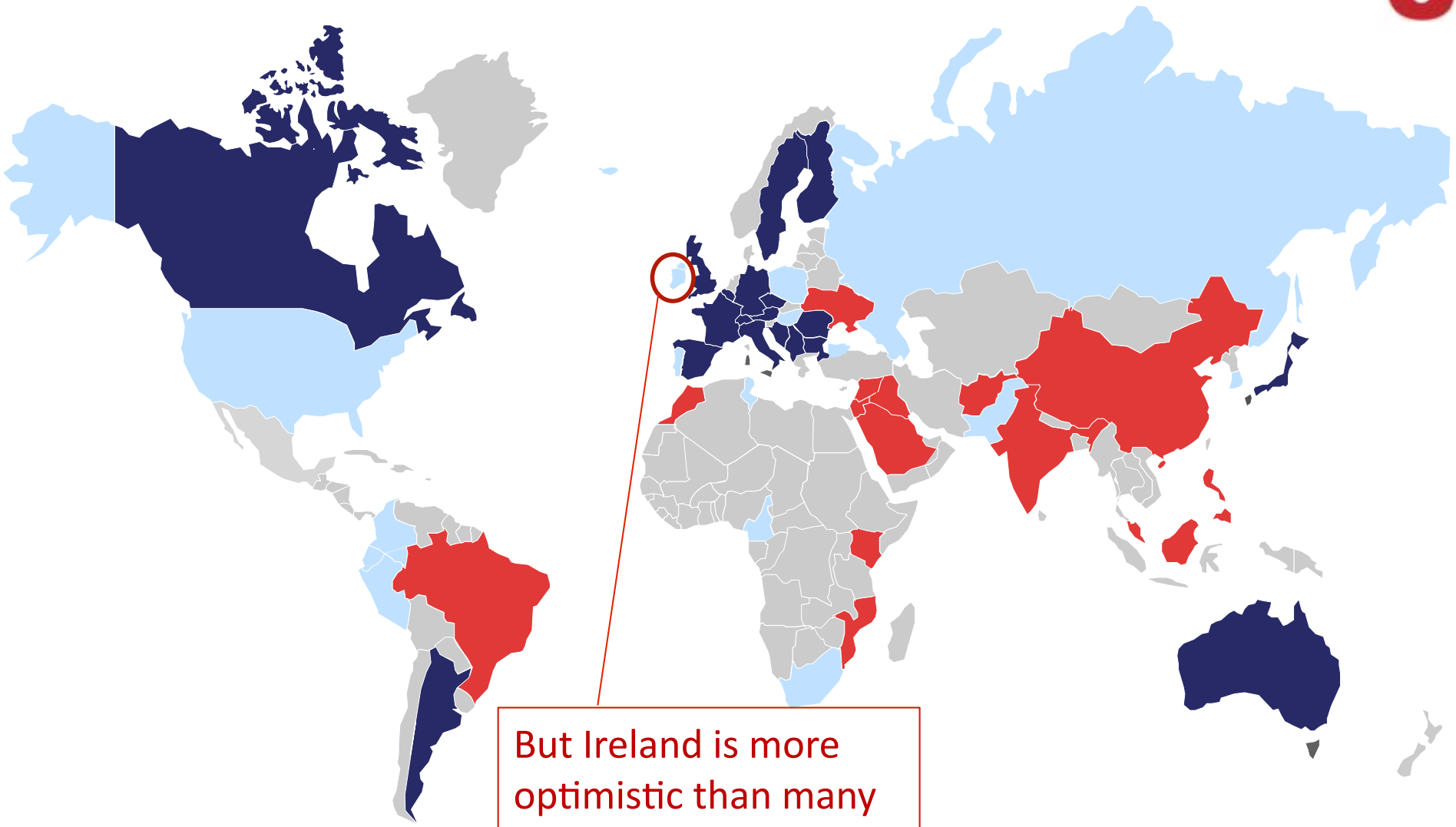
The Irish are less Optimistic about the differences that Mobile can make to their lives than Globally



(Q No)

Mobile Optimist or Pessimist?

Optimist
Enthused/Strivers
Pessimist



But Ireland is more optimistic than many in Western Europe

Global
N=54,121 / N=51,036 Mobile Users
2,502 Million Adults

In fact Ireland is the most optimistic/enthused and least Pessimistic of all of the major countries in Western Europe

	Global	Western Europe	Ireland	UK	France	Germany	Spain
Optimists	31	11	16	12	10	9	18
Enthused	38	25	34	24	27	20	20
Strivers	16	26	29	24	25	37	20
Pessimists	9	30	17	35	35	32	31
No Device	6	8	4	5	4	3	11

(Q No)

The main drivers to Irelands Optimistic view are using the mobile to better socialize and acquire knowledge

	Global N=54,121	Western Europe N=12,918	Ireland N=1,003
Complete Daily Chores	56%	35%	45%
Better Socialize	68%	51%	68%
Learn Valuable Things	51%	32%	44%
Acquire Knowledge	57%	35%	57%
Achieve My Potential at Work	50%	22%	26%
Achieve My Potential in Life	43%	22%	20%

Finland 92%

China 79%

Afghanistan 74%

The Irish are rational about the impact that mobile has on them, agreeing that it helps with daily tasks, but not as much that it enhances their quality of life

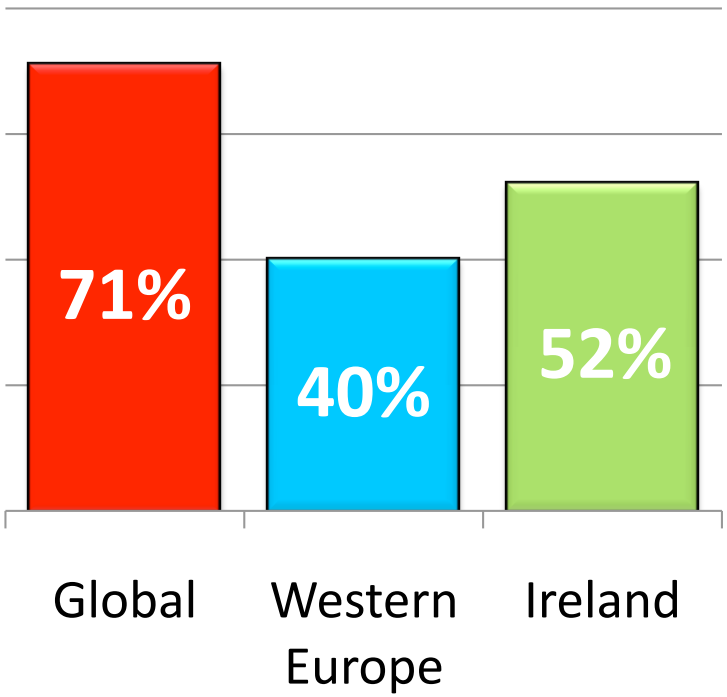
	Global N=54,121	Western Europe N=12,918	Ireland N=1,003
Is Important to accomplishing daily tasks (% Important)	83%	55%	65%
Enhances my quality of life. (% Significantly enhances)	55%	29%	30%

China 85%
Kenya 74%

(Q No)

My Mobile Device Enables Me To Be A…

More Informed Shopper

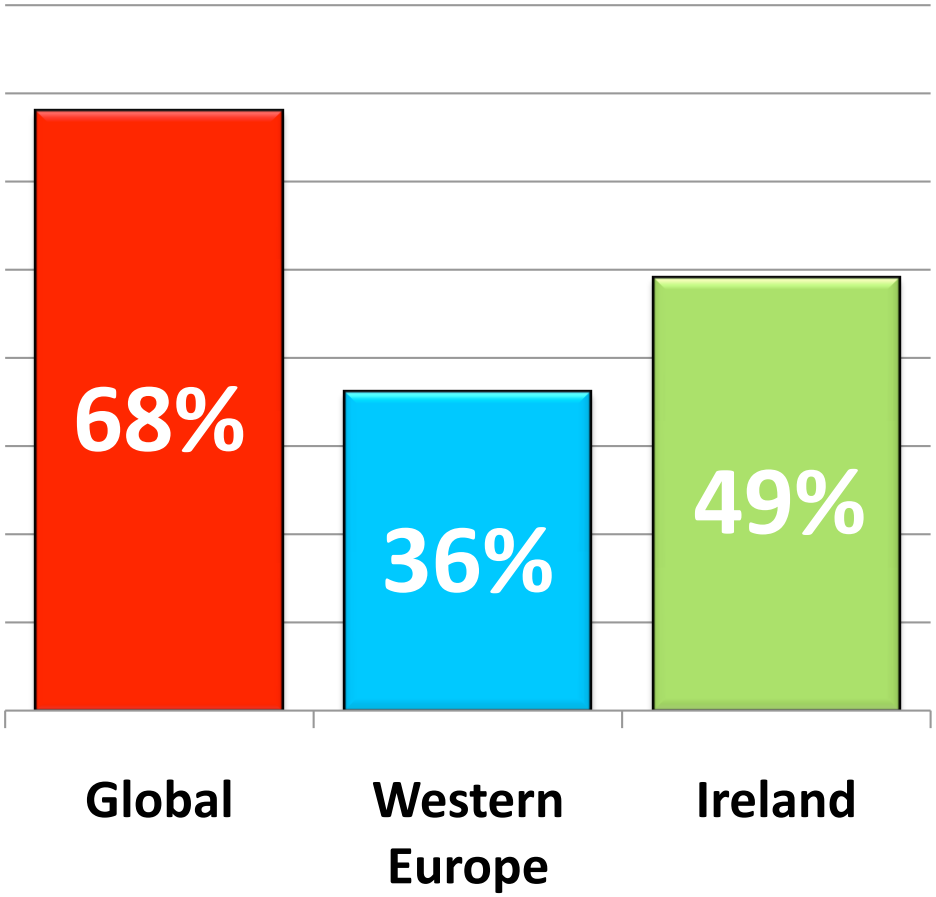


Brazil 85%

(Q No)

My Mobile Device Enables Me To Be A…

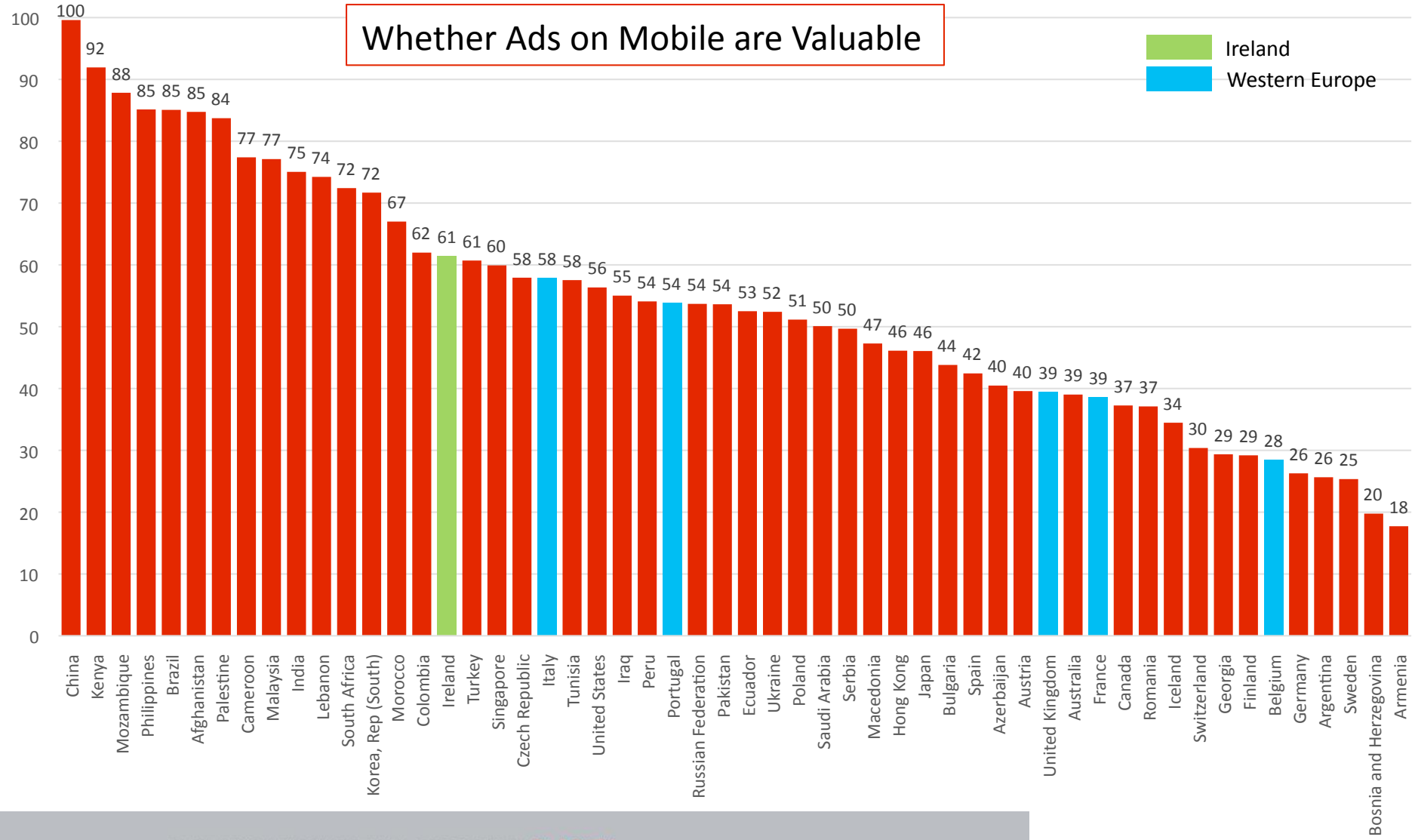
Smarter Shopper



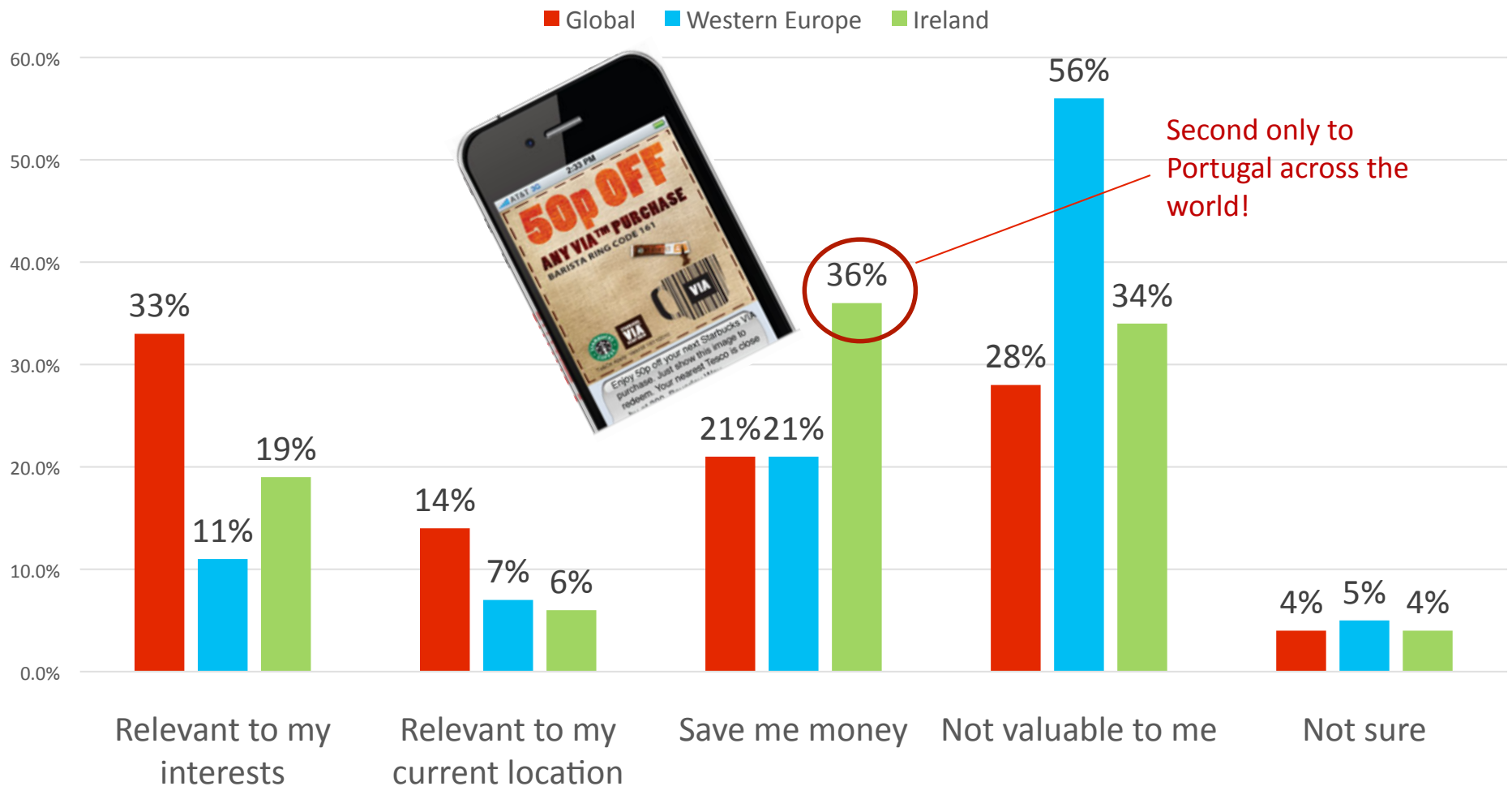
Brazil 85%

(Q No)

More people in Ireland believe ads on their mobile are valuable, than in any other country in Western Europe



Ads On My Mobile Are Most Valuable When They Are …



…Irish are much more likely to see mobile ads as valuable, particularly if they save the owner money!

Ads On My Mobile Are Most Valuable When They Are …

…targeted at younger age groups!

Implications for advertising….
In Ireland we need to be aware of BOTH…

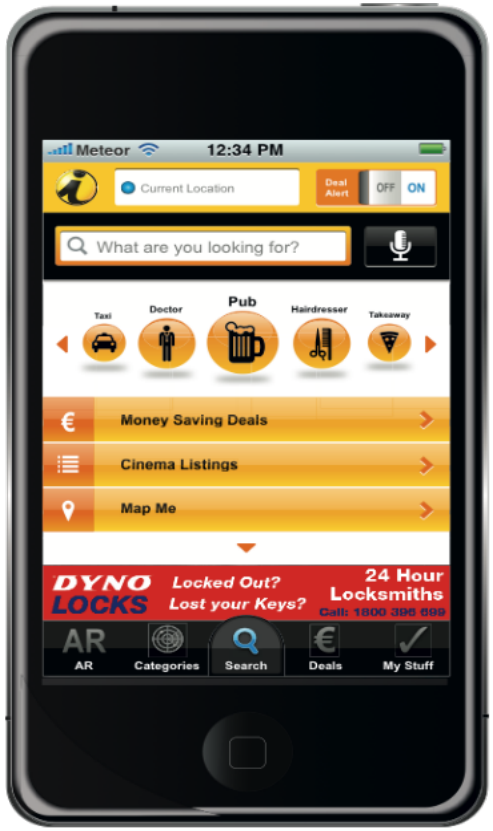
The Growth of Mobile

Our more positive attitude towards its use

Search as a Case Study

Traditional Search

New Search



Channel Usage of Golden Pages 2011 vs. 2013

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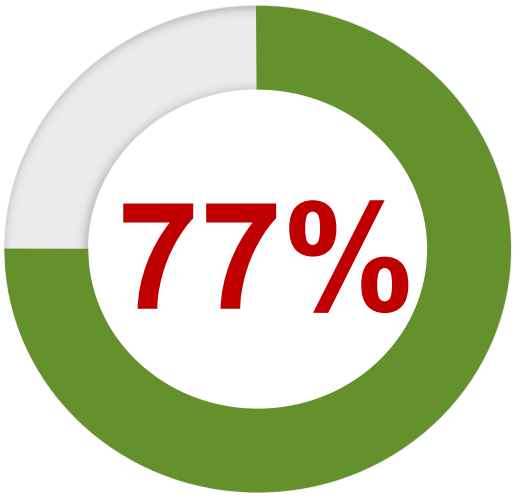
BOOK

ONLINE

MOBILE

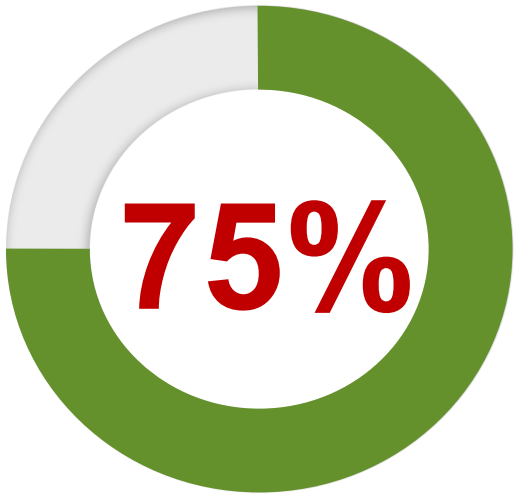
APP

TOTAL REACH 2011
All Adults 18+



Effectively the Same

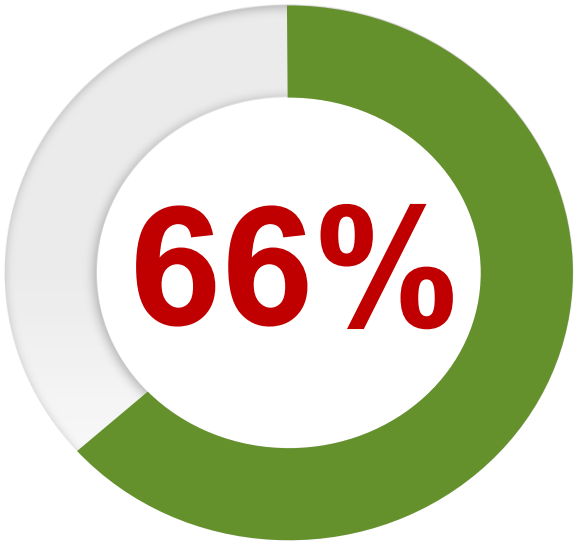
TOTAL REACH 2013
All Adults 18+



Usage of Smartphone as Search Tool

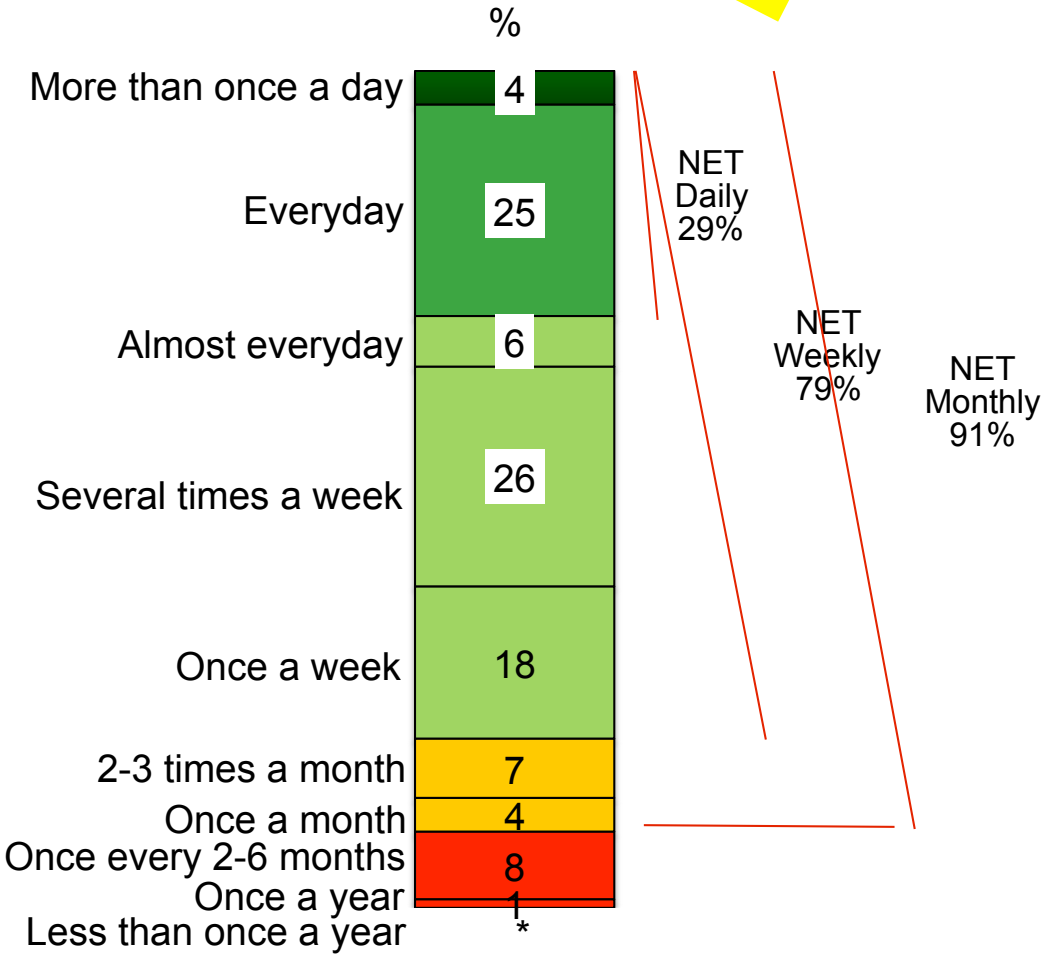
Proportion using Smartphones as Search Tool

(Base: All Who Have Smartphone Or iPhone; n=238)



Frequency Of Usage

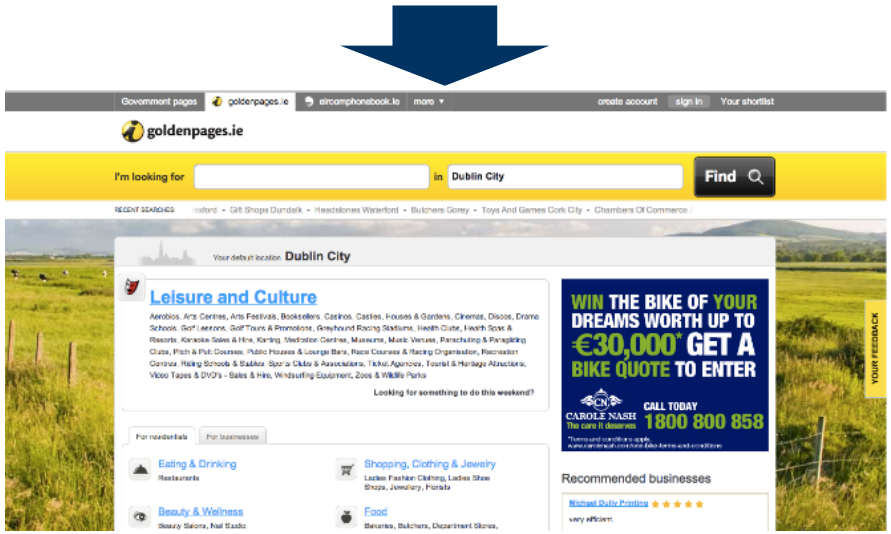
(Base: All Who have searched for products & services on mobile phone; n=156)



Those with Smartphone's are using them as search tools on a regular basis.

goldenpages.ie is 1 product delivered over 3 platforms

Business Information



goldenpages.ie

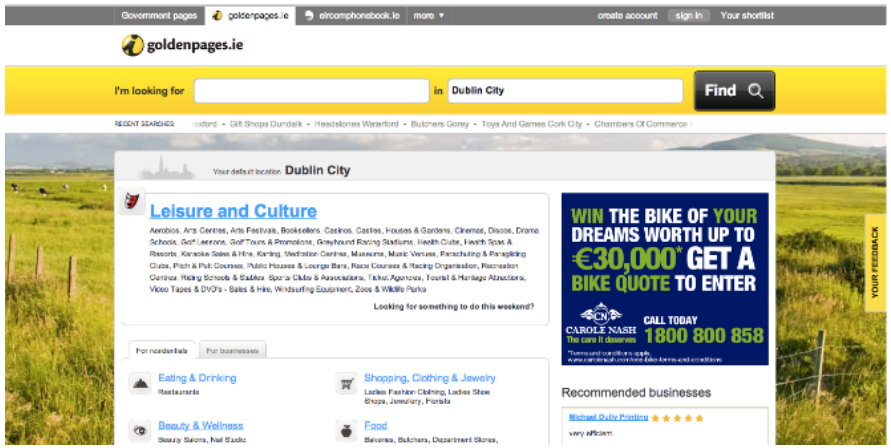
goldenpages.ie is 1 product delivered over 3 platforms

34 million searches

across Ireland

170,000 installs

1.2 million unique users per month



goldenpages.ie

Goldenpages directory – Population Based Equivalents

goldenpages.ie
Print

1.81 Million People Used The Golden Pages Directory in the Past Year

This resulted in 34 Million Searches Per Year

With 80 Million Businesses reviewed in total across all searches annually

Resulting in 21 Million Purchases Annually

(Q.9/12a/13b)

goldenpages.ie

Goldenpages directory – Population Based Equivalents

goldenpages.ie Online

1.1 Million
People Used Goldenpages.ie Annually

→

23 Million
Users Per Year

→

106 Million
Businesses Reviewed Annually

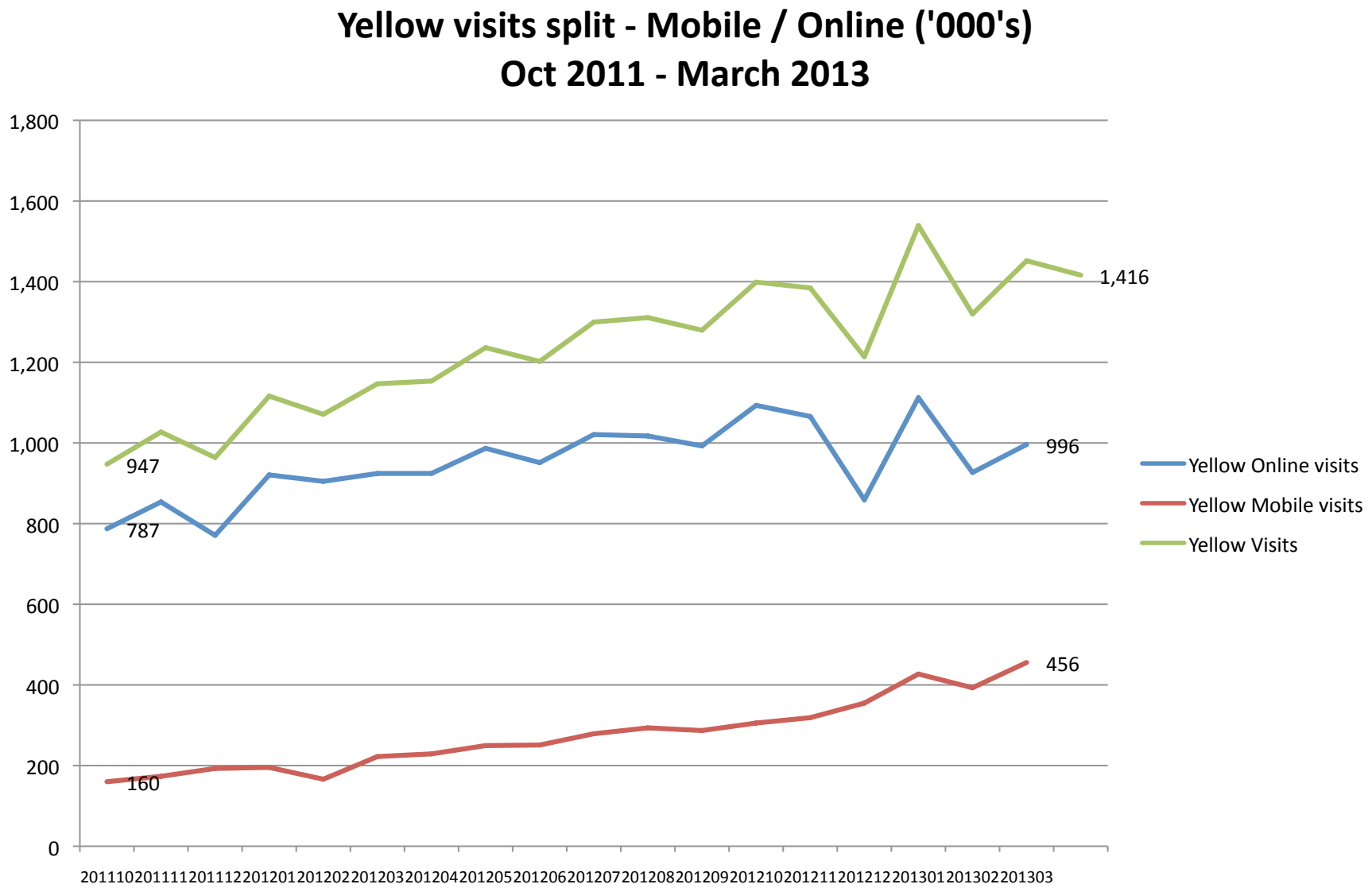
→

14 Million
Purchases Annually

goldenpages.ie

(Q.31/35b/38b)

goldenpages.ie Visits



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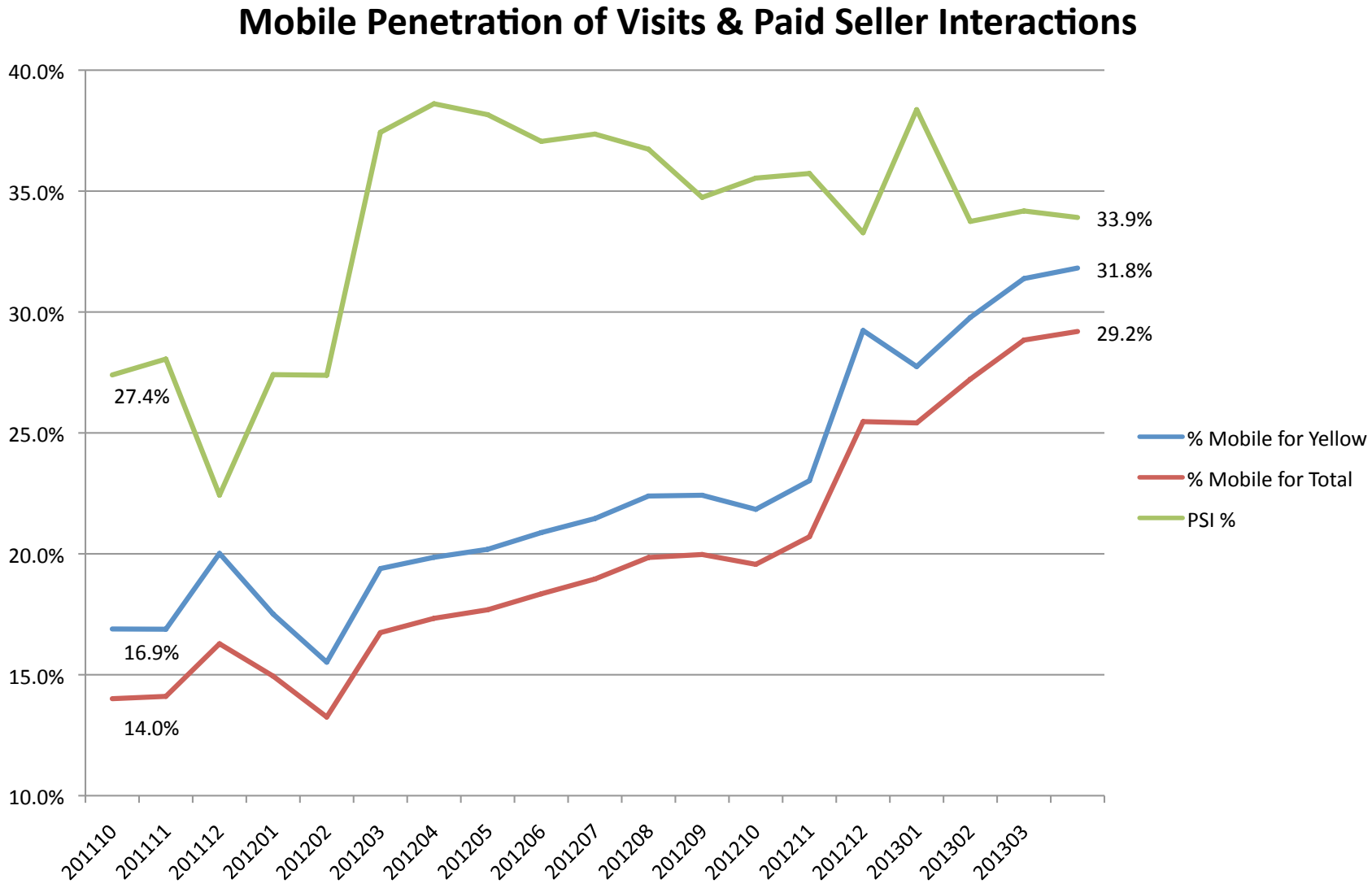
goldenpages.ie Mobile Growth & Paid Seller Interactions



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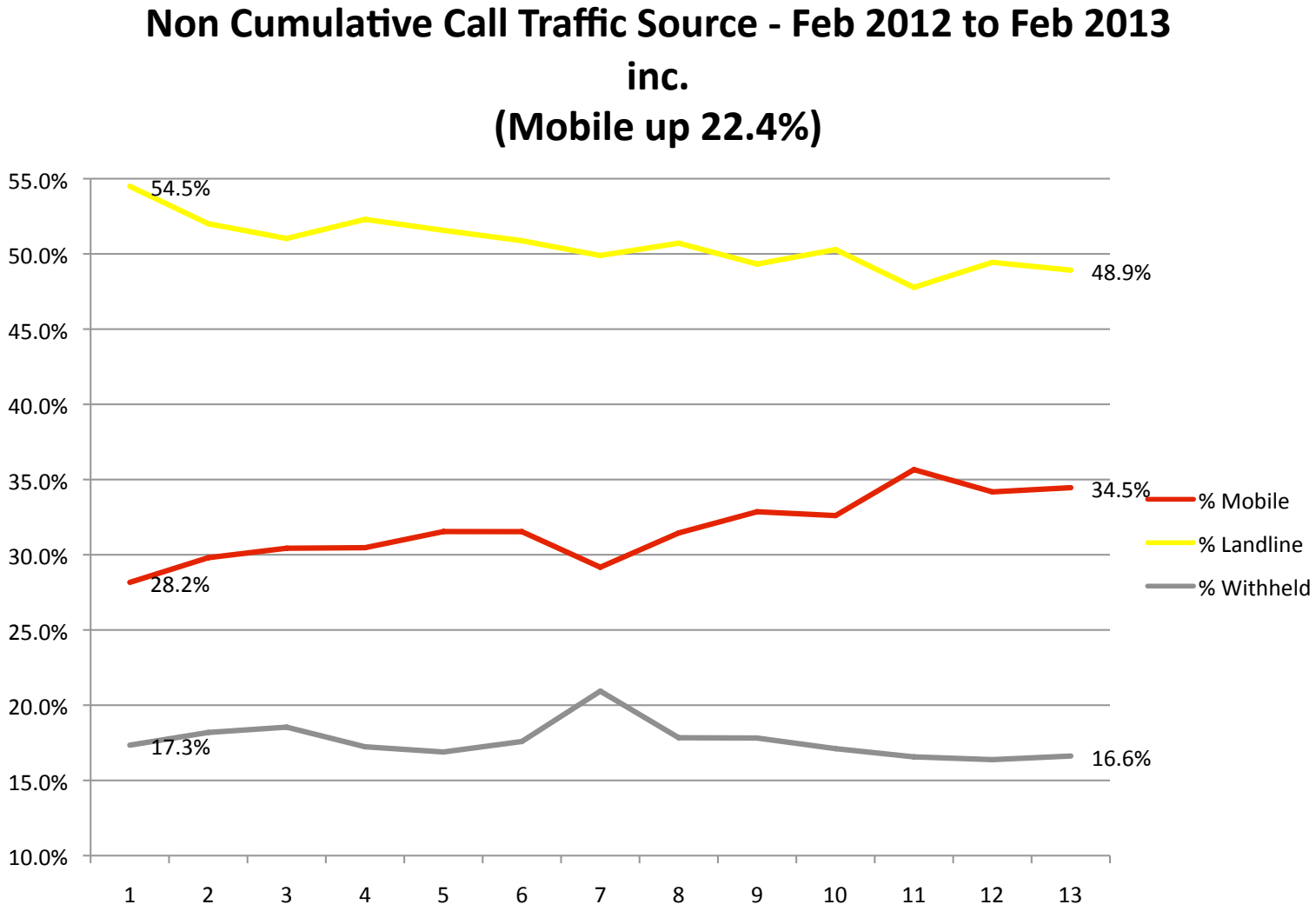
Interactions from Mobile Devices



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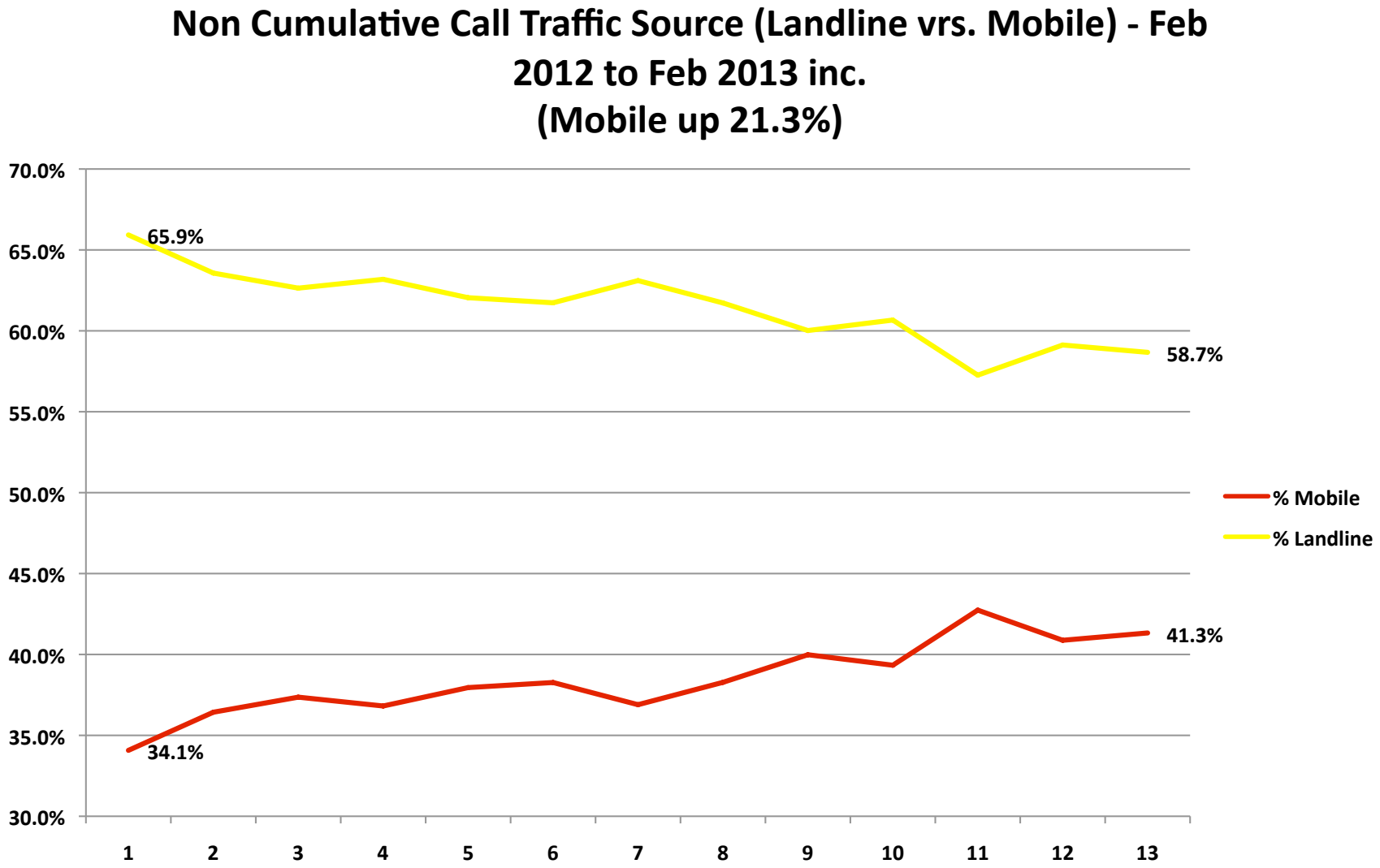
Interactions from Mobile Devices



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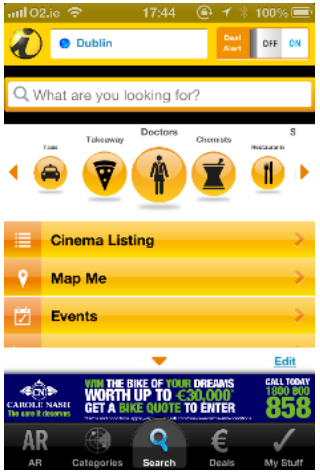
The goldenpages.ie App

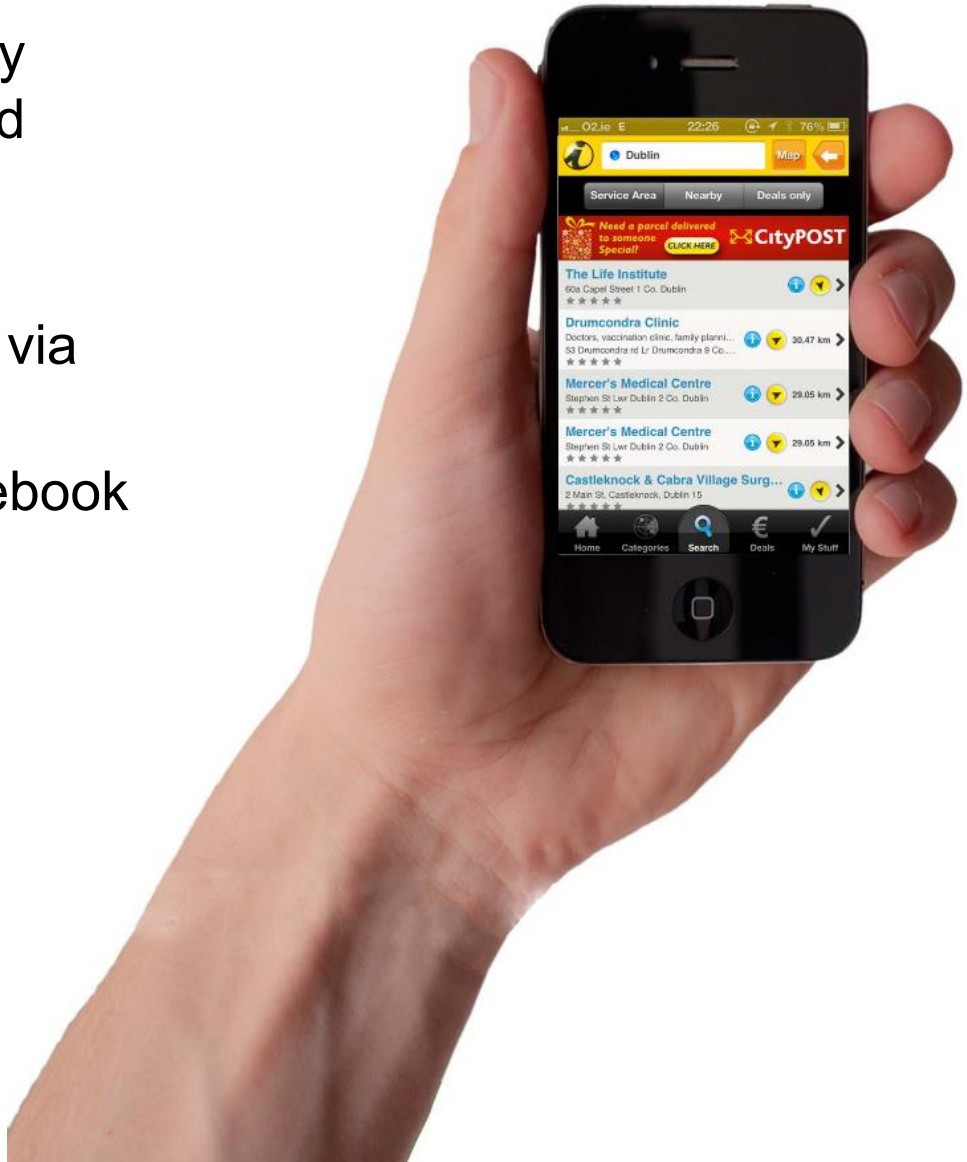
- New design for quick searching
- Value added features to make users engage more with the App
- Location Based Offers & Alerts
- Augmented Reality



goldenpages.ie

The goldenpages.ie App

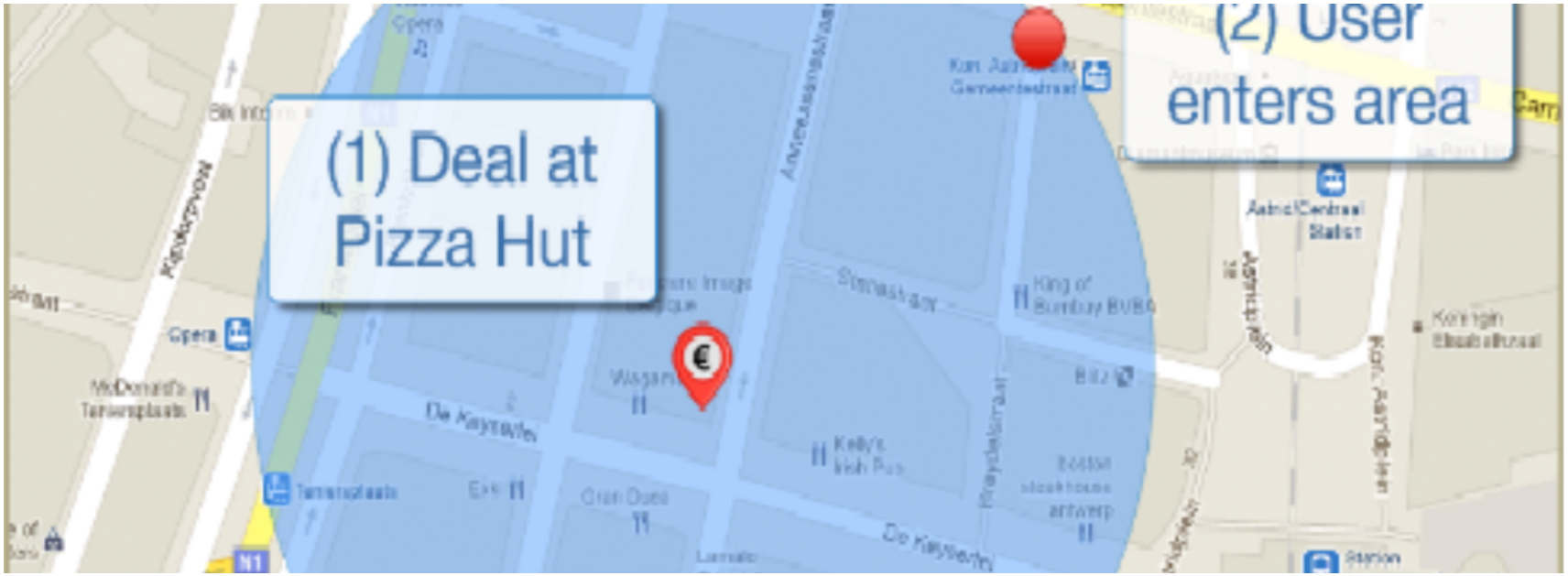
- Results can be sorted by service area, nearby and deals only
- Swipe to Call
- Send listing information via sms, email
- Share on Twitter & Facebook

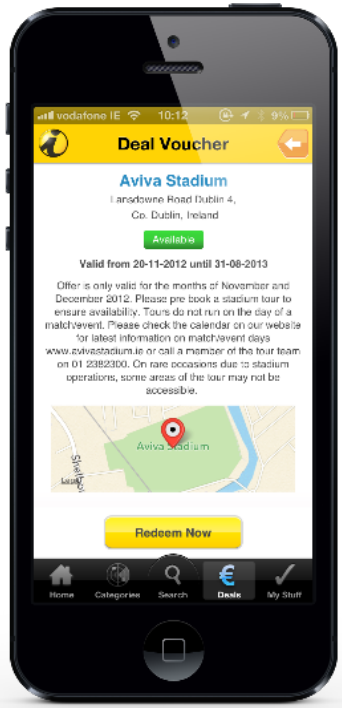


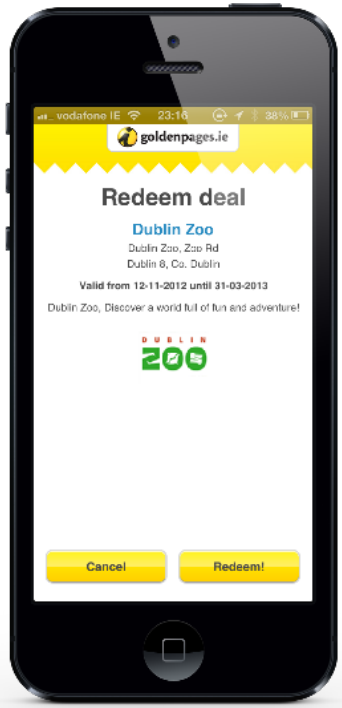
pages.ie

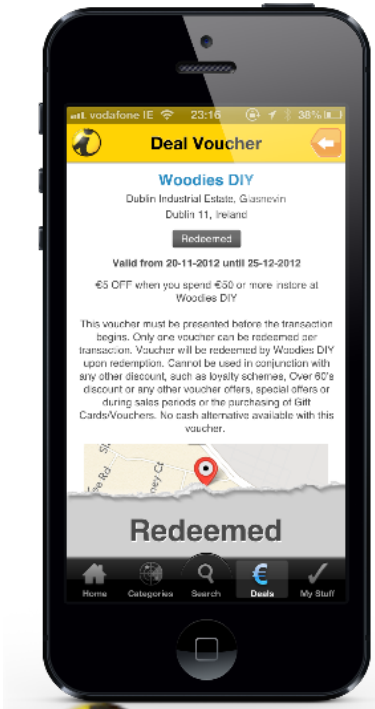
The goldenpages.ie App

- Find a cinema
- Find a film
- Find a Restaurant









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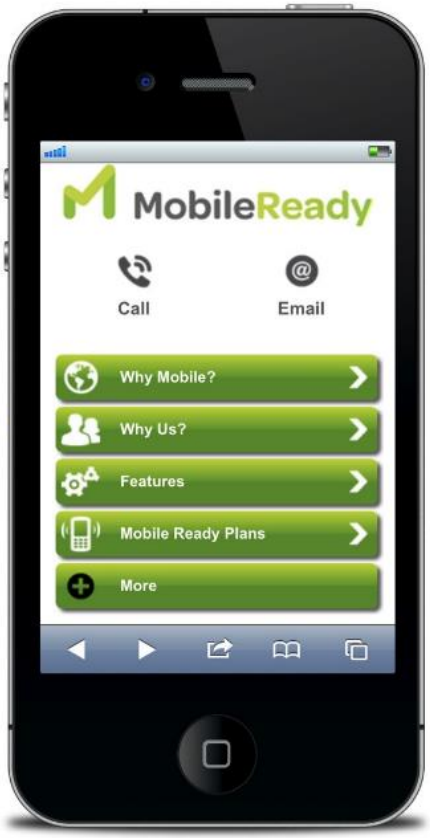
MobileReady.ie : Optimising the Mobile Experience

- Providing Irish businesses a simple way to capture mobile users
- Provides another delivery method for Offers & Alerts and other services
- Over 50,000 MobileReady pages visited

Standard Site



MobileReady Site

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Using Wifi to Extend Mobile Reach

- Expanding around Dublin City Centre
- Brand and promotion opportunities
- Staying Connected to our market

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Link & Leverage Across Multiple Channels

"Offer or Alert"

LBA on the App

Goldenpages.ie
m.goldenpages.ie

Mobile Website

Leaflet Drops

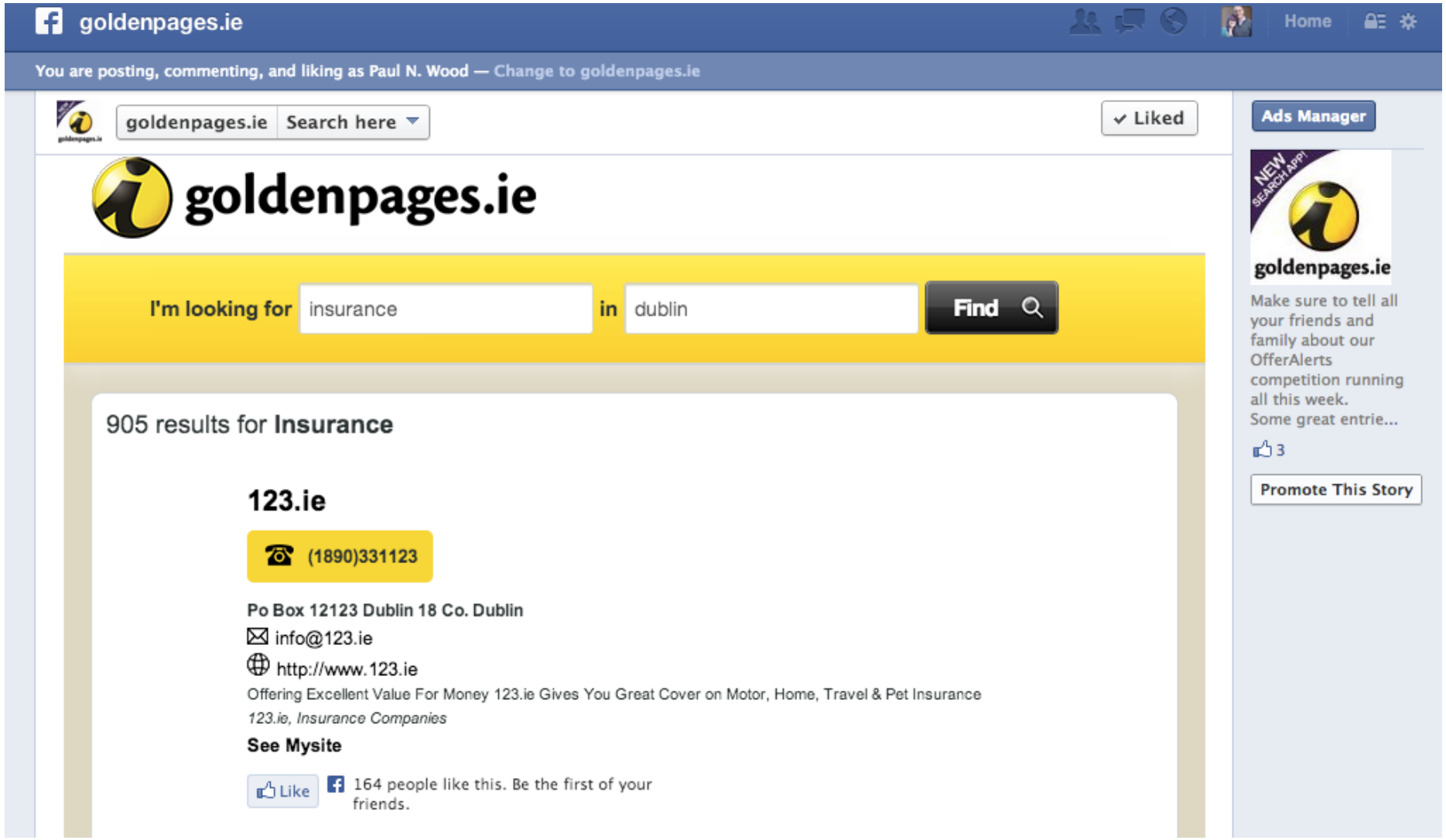
CityPOST Partner

Google Places

Google places

goldenpages.ie

Search goldenpages.ie within Facebook



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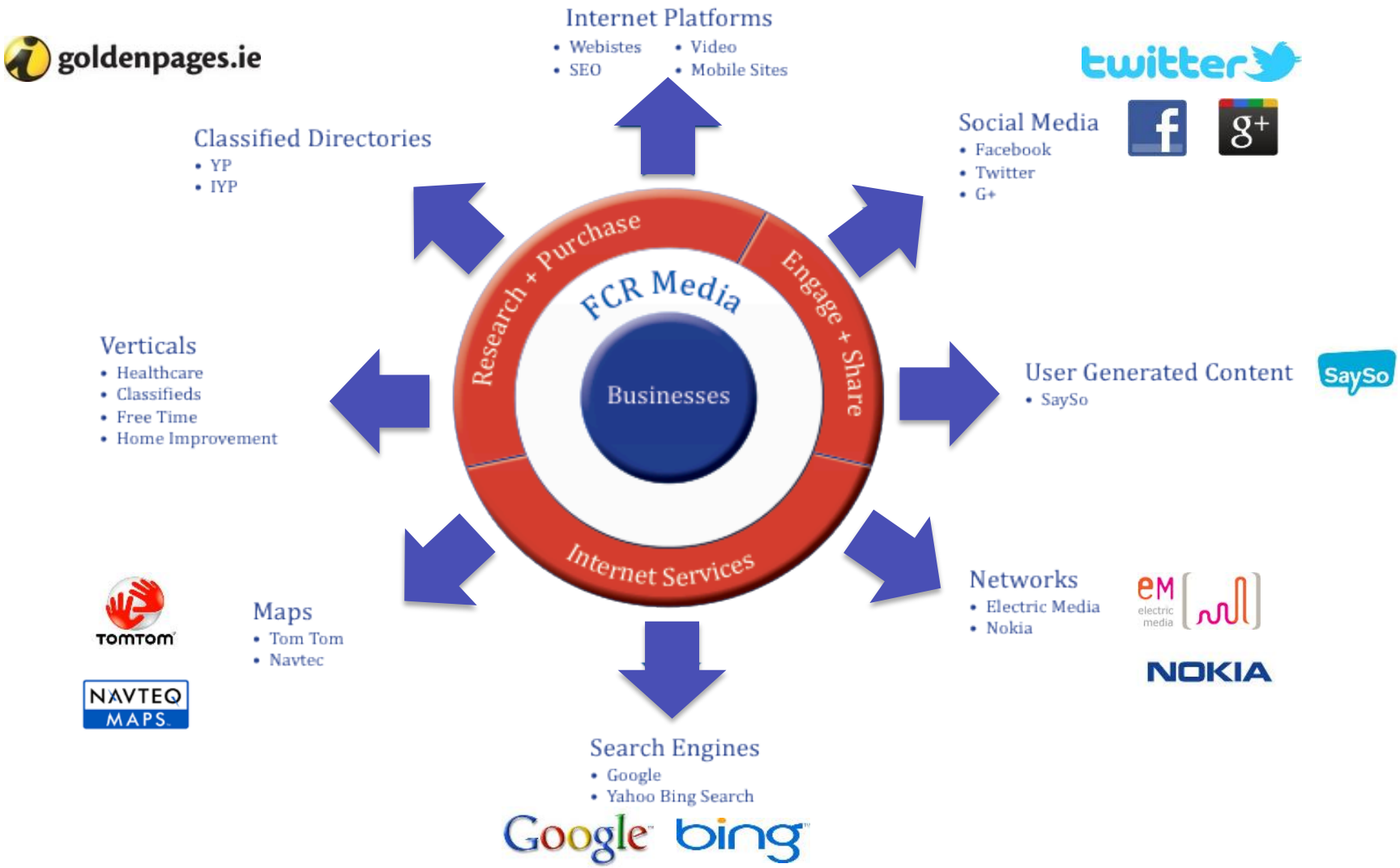
Expanding Product Solution Set



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FCR Media Group: Significant Growth in 2012

FCR Media is a group of leading online, mobile and print media companies, currently operating in Ireland, Sweden, the Czech Republic and Slovakia, Russia*, Lithuania, Estonia and Latvia.
Group target is to become the leading Digital Media Agency for SOHO market in mid sized European countries.

Key facts

- FCR Media operates in 8 countries
- Group revenues in 2012 (pro forma) 96,7 m EUR
- 90% of revenues are generated in non-Baltic countries
- FCR Media has positive EBITDA and cash flow, with cash position higher than debt
- The Group is controlled by a leading Baltic private equity fund
- FCR Media has 1300 employees
- Group's key advantages are: strong sales organization (~650 sales reps), well-known brands, and large number of clients (130k SMEs)
- Product portfolio includes: Internet yellow pages, social media management tools, mobile search platforms, print yellow pages, SEM and SEO services, etc.

* Russia is not included in financials in the following slides as the transaction is in the process

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FCR MEDIA

Facilitating Commerce & Relationships

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SaySo.ie

eircom Phonebook
eircomphonebook.ie

MobileReady.ie

Google ADWORDS PREMIER SME PARTNER

EUROPAGES

CityPOST Partner

NOKIA Authorised Reseller

YAHOO! | bing NETWORK

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