

# Mobile music on the increase across Europe

LONDON, UK: US lags behind Europe with nearly half as many mobile users listening to music, according to comScore, Inc, a leader in measuring the digital world, which recently released data from the comScore MobiLens service which showed that 23.8% of mobile users across five leading European mobile markets (UK, France, Germany, Italy and Spain) listened to music on their mobile handsets during the three month period ending March 2010. The 54 million total mobile music users in the EU5 countries represent a 10% increase in the past year.



Spain led the way with 30% of mobile users listening to music from their primary handsets followed by Germany with 25.8%. The U.K., known for its affinity for music, actually falls slightly behind the average in EU5 with 22.6% penetration of mobile users. Listening to music on mobile phones was least popular in France and Italy, with 21% of both markets engaged in this activity. The US, in contrast, lags far behind all EU5 countries with only 13.2% of the mobile population using mobile handsets to listen to music.

Mobile Music Users Three-Month Average Ending March 2010 Total US + EU5 (UK, DE, FR, ES and IT), Age 13+ Source: comScore MobiLens							
	Penetration (%) of Mobile Subscribers						
	EU5	France	Germany	Italy	Spain	UK	US
Listen to Music	23.8%	21.1%	25.8%	21.1%	30.0%	22.6%	13.2%
Listen to Music Sideloaded From PC	20.3%	17.6%	22.2%	17.8%	26.0%	19.4%	9.7%
Purchased a Ringtone	3.7%	3.4%	3.8%	5.3%	4.0%	2.2%	5.5%
Downloaded Music Direct to Mobile Device	1.9%	1.9%	2.0%	1.7%	1.6%	2.1%	1.7%

## Mobile is an ideal channel for music publishers and promoters

Germany led all EU5 countries in downloading music directly to mobile handsets with more than 1 million mobile music downloaders in March 2010, while also demonstrating the fastest growth rate at 102%. Italy ranked as the second fastest growing market (up 92%) followed by France (up 50%). Once again, growth in the EU5 countries significantly outpaced the US, which grew just 10% to 4 million users.

Downloaded Music Direct to Mobile Phone Three-Month Avg. Ending March 2010 vs. 3 Month Avg. Ending March 2009 Total US + EU5 (UK, DE, FR, ES and IT), Age 13+ Source: comScore MobiLens			
	Mobile Subscribers Who Downloaded Music Direct to Mobile Phone (000)		
	Mar-2009	Mar-2010	% Change
EU5	2,647	4,286	62%
Germany	517	1,042	102%
Italy	421	807	92%
France	582	874	50%
U.K.	716	995	39%
Spain	411	568	38%
US	3,701	4,077	10%

"Despite rapid growth in mobile music downloaders in Europe, the total addressable market in the EU5 is still quite small. However, we see a significant untapped advertising opportunity for music publishers and promoters. People who listen to music on their phones are more likely to browse the Internet and almost half own smartphones," says Alistair Hill, senior analyst at comScore. "The high penetration of smartphones and likelihood to browse shows how ideal this audience is for targeted mobile advertising. The mobile channel offers an opportunity to get in front of consumers at one of their primary access points for music consumption."

Other notable findings about Europe's mobile music market from March 2010 include:

Of the 54 million users listening to music on a mobile device in the EU5:

- 42% have a smartphone compared to 25% of the total mobile subscribers;
- 47% browse the mobile internet compared to 25% of the total mobile subscribers;
- 85% of those who listened to music on their phone, listen to 'side loaded' music (loaded from a PC);
- 8% of those who listened to music on their phone, have downloaded it direct to their device.

### March 2010 European mobile benchmark data

Below is comScore's March 2010 benchmark data, including a review of mobile consumption behaviours and device penetration for five EU countries. This benchmark data will be updated on a monthly basis to provide the most up-to-date snapshot of the mobile industry. Further information on this benchmark data, and other data included above, can be provided upon request.

<b>Mobile Benchmark Data for the European Market Three-Month Average Ending March. 2010 Total EU5 (UK, DE, FR, ES and IT), Age 13+ Source: comScore MobiLens</b>						
	Reach (%) of Mobile Subscribers					
	EU5	UK	France	Germany	Italy	Spain
Sent text message to another phone	82.2%	90.1%	80.4%	80.9%	77.5%	82.0%
Used application (including games)	35.0%	39.2%	25.9%	33.8%	39.4%	37.4%
Used browser	25.0%	33.6%	24.0%	20.3%	23.6%	22.9%
Listened to music on mobile phone	23.8%	22.6%	21.1%	25.8%	21.1%	30.0%
Accessed Social Networking Site or Blog	13.7%	20.7%	12.6%	8.8%	14.2%	12.1%
Accessed news	11.1%	15.5%	10.3%	9.2%	12.0%	7.9%
Smartphone	24.5%	25.0%	17.1%	18.6%	33.3%	30.5%
3G Subscribers	44.0%	43.3%	38.6%	40.4%	45.6%	55.0%

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