

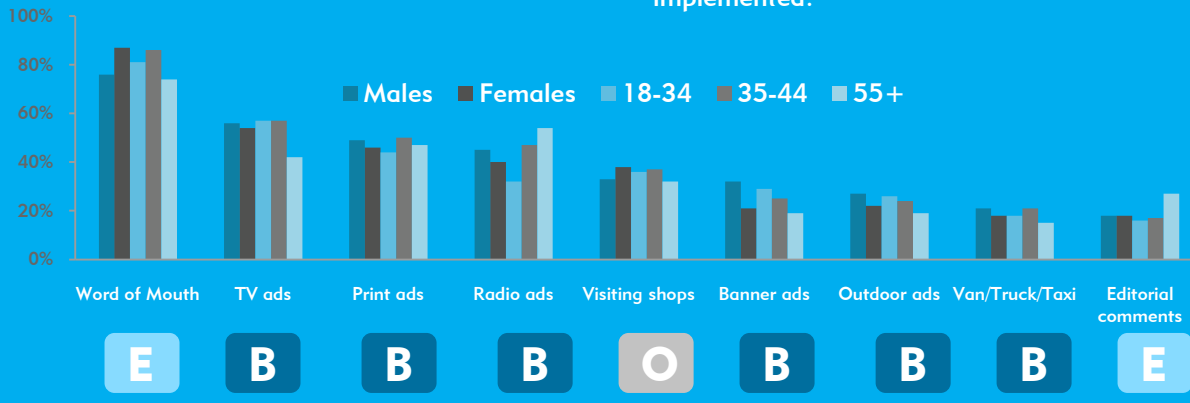
CARAT PULSE NEWS

AUGUST 2011 MEDIA INSTRUMENTALITY

As the shift in the rules of engagement between brands and consumers continues, we explored which channels within the Bought, Owned, Earned (BOE) media model are most effective in driving people online to search for more information about a company, product or service. Word of Mouth is the most trusted communication channel (*Carat Pulse March 2011) and it is also now seen as one of the most powerful ways to transmit branded messages. The results of our research show that WoM is also the primary driver to search. It is most influential with women and middle-aged adults which is seen in similar studies carried out across other European markets. Ireland's close relationship with Radio (85% of Irish people tune in everyday according to the



latest JNLR research) is also a point of difference to Europe and is most effective with males and over 55's at driving search. The relative disconnect between Outdoor and Search is likely to alter with the increasing digitization of this media in the rise of digital screens and the use of QR codes. We expect to see a much closer relationship developing as technology is implemented.



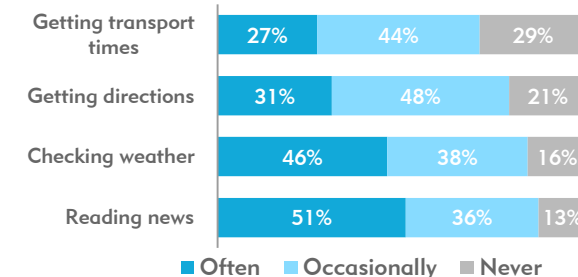
SMARTPHONES: APPS & ONLINE HABITS

Since we first asked our panel about owning a smartphone in June 2010, the figure has increased dramatically. The percentage of people downloading apps has grown in line with the penetration of smartphones - growing from 17% to 36%.

In terms of accessing the internet via their smartphones, while e-mails are still the predominant communication, social networks and voice over IP usage is significant, with 80% of smartphone owners accessing their social networks and 36% using Skype. Skype is primarily used by males (53% vs 22% of females). For social network usage, there is a significant female skew with 84% (vs 76% males) accessing a social network from their handset.

When it comes to specific information seeking, reading news and checking weather are the most popular information seeking activities carried out on smartphones.

INFORMATION SEEKING



Please Note: The Pulse survey is conducted completely online. iReach Market Research use all best endeavors to ensure survey design, sampling and subject solicitation, distribution methods and response rates remove any possible bias in using an online survey approach over a telephone survey approach.

For more information or a presentation on the Pulse research, contact Dael Wood
T: +1 271 2100. E: dael.wood@carat.com