  

Opportunities for mobile content

Assessing interest in mobile internet and content services

Top line results only

Full results available mid Jan 2010

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Ipsos MediaCT

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Study background

Study into mobile internet and content usage

When? November 2009

How? Online GB survey

Who?

representative sample of 500 general mobile consumers aged 15-50

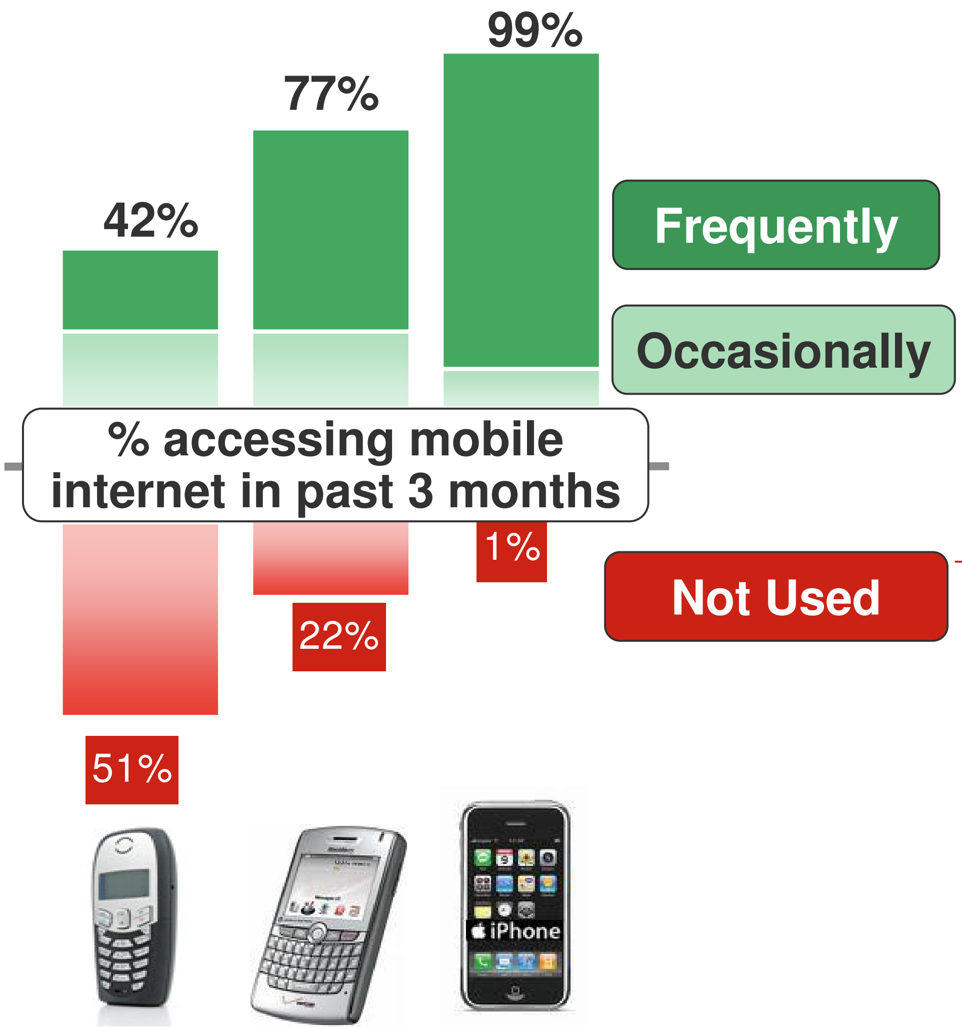
+ boost of 100 (non iPhone) smartphone users

+ boost of 100 iPhone users

How **widespread** is mobile internet usage?

Usage of mobile internet in past 3 months is far from universal

Base: all mobile owners (n=501 + boost)



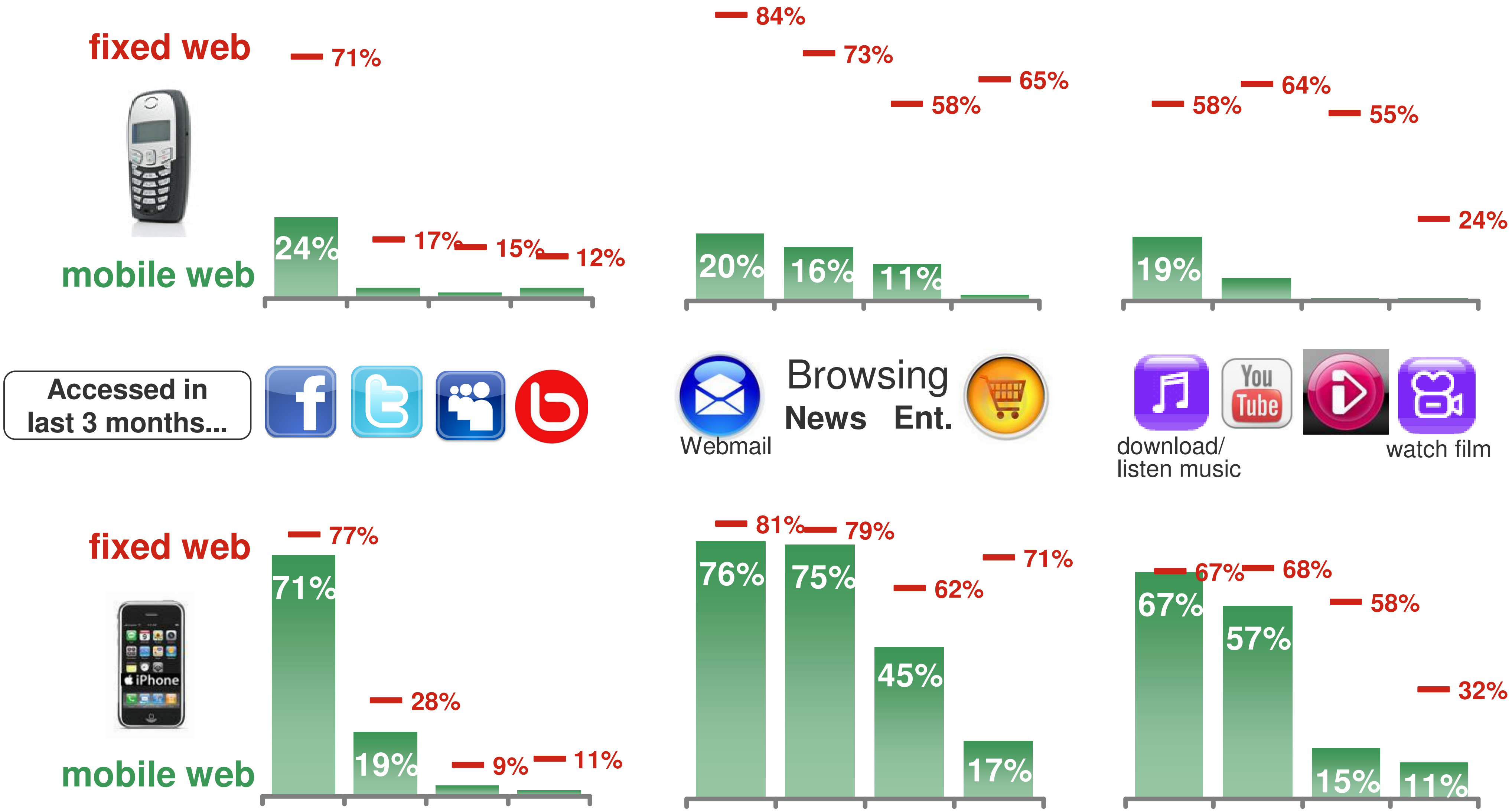
Barriers to mobile internet

Internet on PC is better	**47%**
Cost	**36%**
Screen is too small	20%
Connection is too slow	16%
Don't have internet on phone	14%
No need to	12%
Never considered it	11%

How different is usage of fixed vs. mobile internet?

Most web activity remains via fixed internet for mobile users

Base: all mobile owners (n=501 + boost)



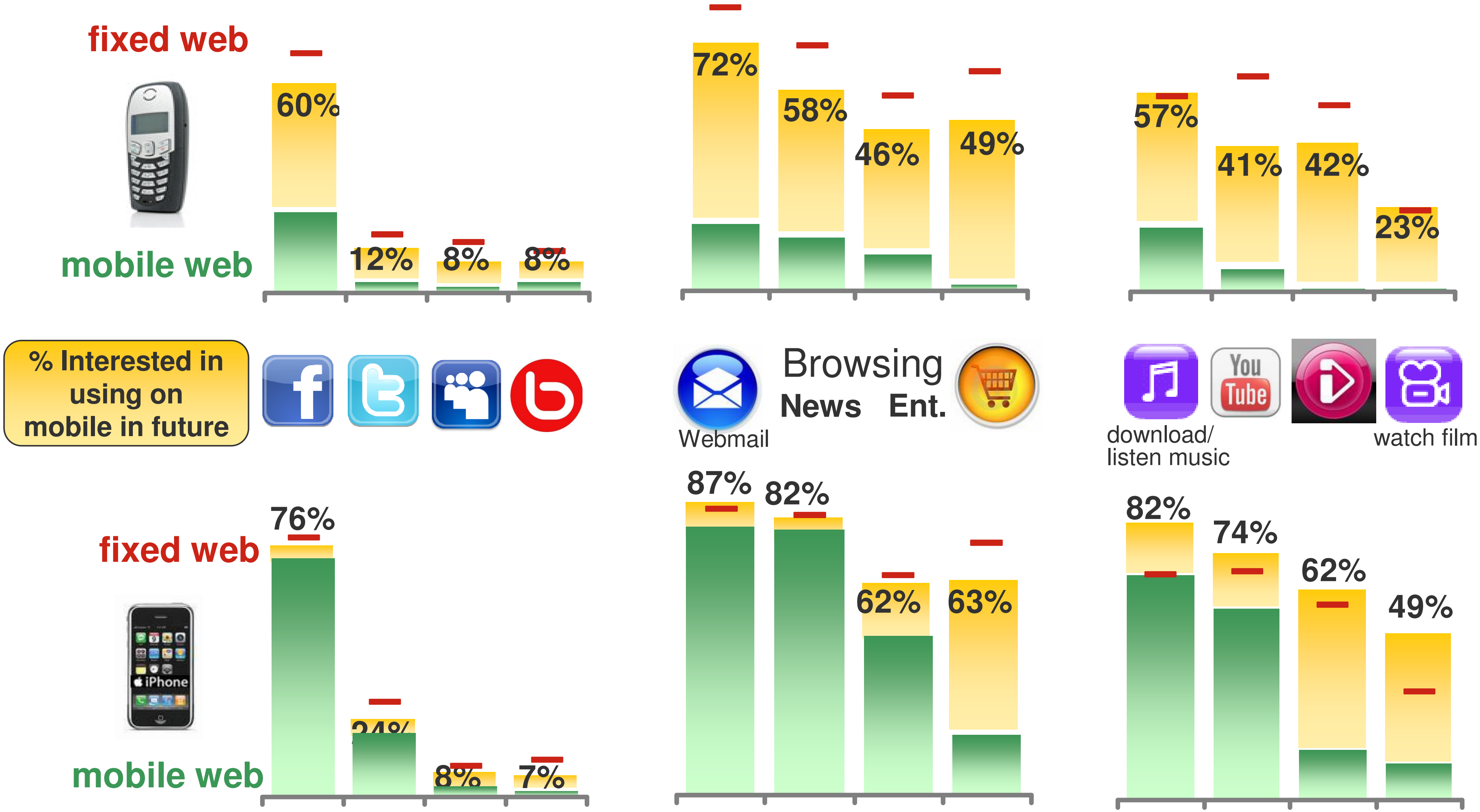
What do mobile users want to access in future?

assuming their handset had...

...large colour screen, where mobile internet is as fast as 'traditional' broadband and web browsing included in tariff

Mobile users can see themselves using mobile internet as much as fixed

Base: all mobile owners (n=501 + boost)



Which content models work on mobile?

8 content types, 20 models tested

1) Music
2) TV
3) Film
4) Sports
5) Location-Based
6) Newspapers
7) Games
8) eBooks

Highlights from 3 categories

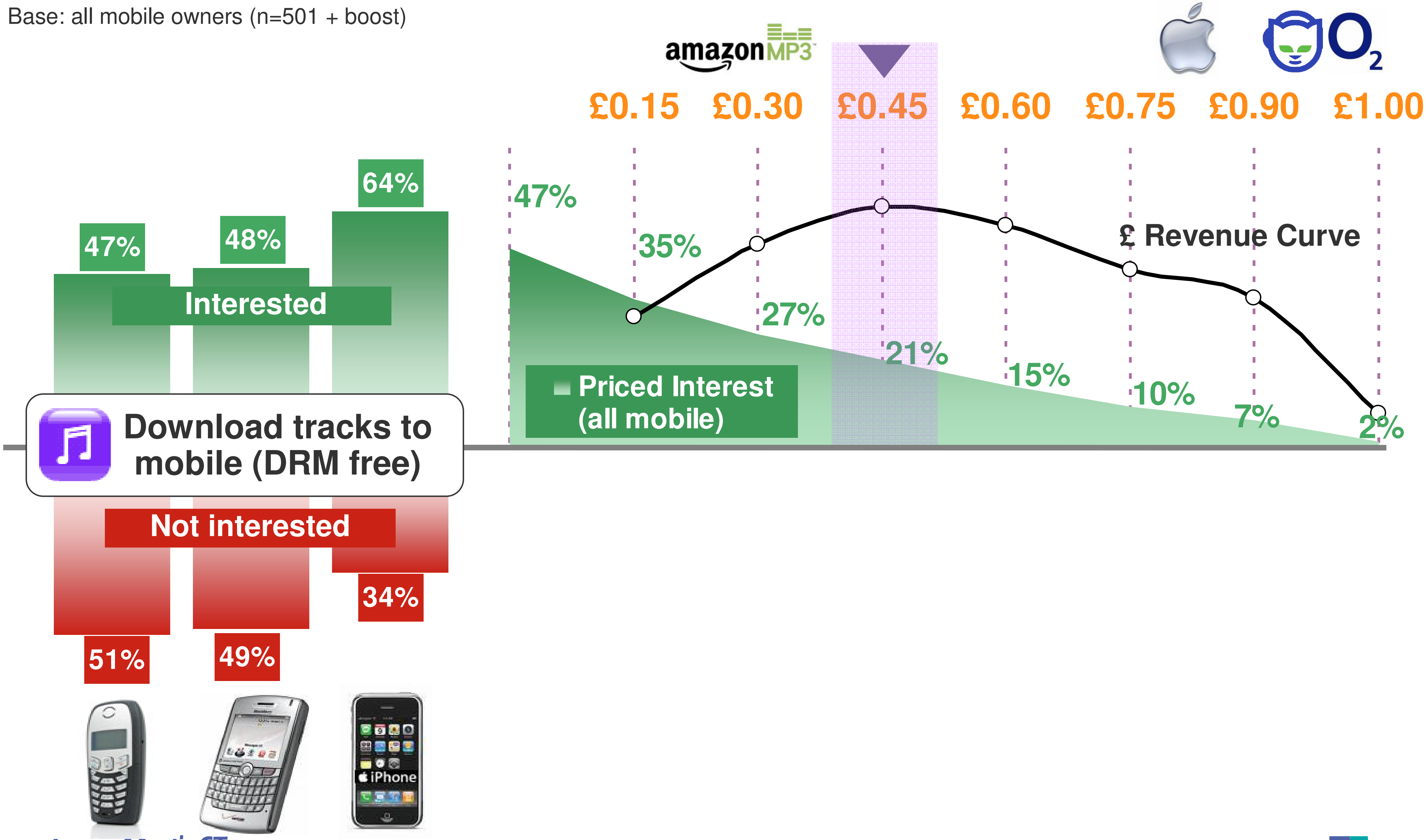
Based on respondents assuming they owned a handset that had a large colour screen, where mobile internet is as fast as 'traditional' broadband and web browsing included in tariff

Are consumers willing to pay for music services to a mobile?

Already well established

Downloading tracks has high appeal particularly for iPhone owners

Base: all mobile owners (n=501 + boost)



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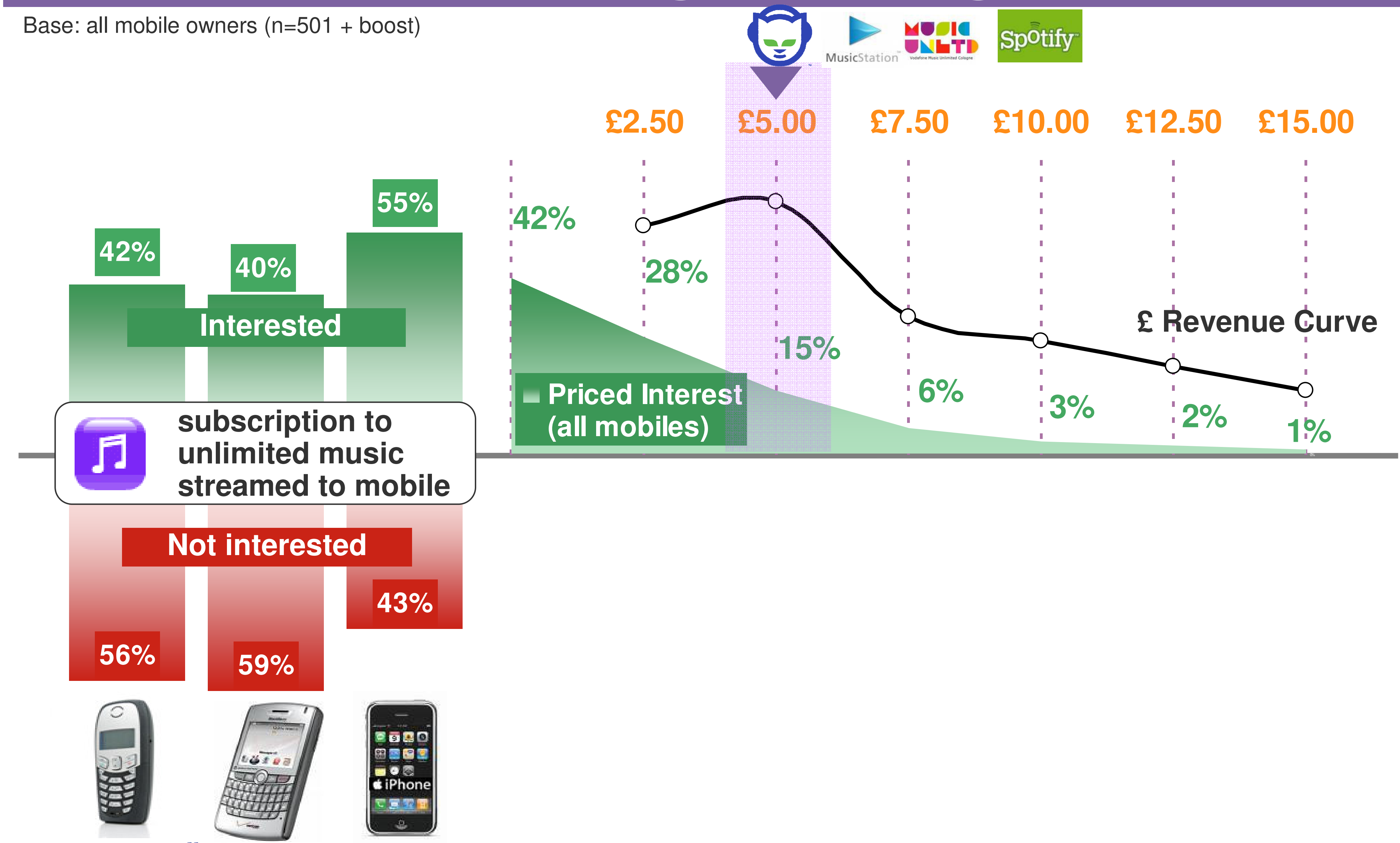
Subscription to unlimited music streamed to mobile is compelling at the right price

Base: all mobile owners (n=501 + boost)



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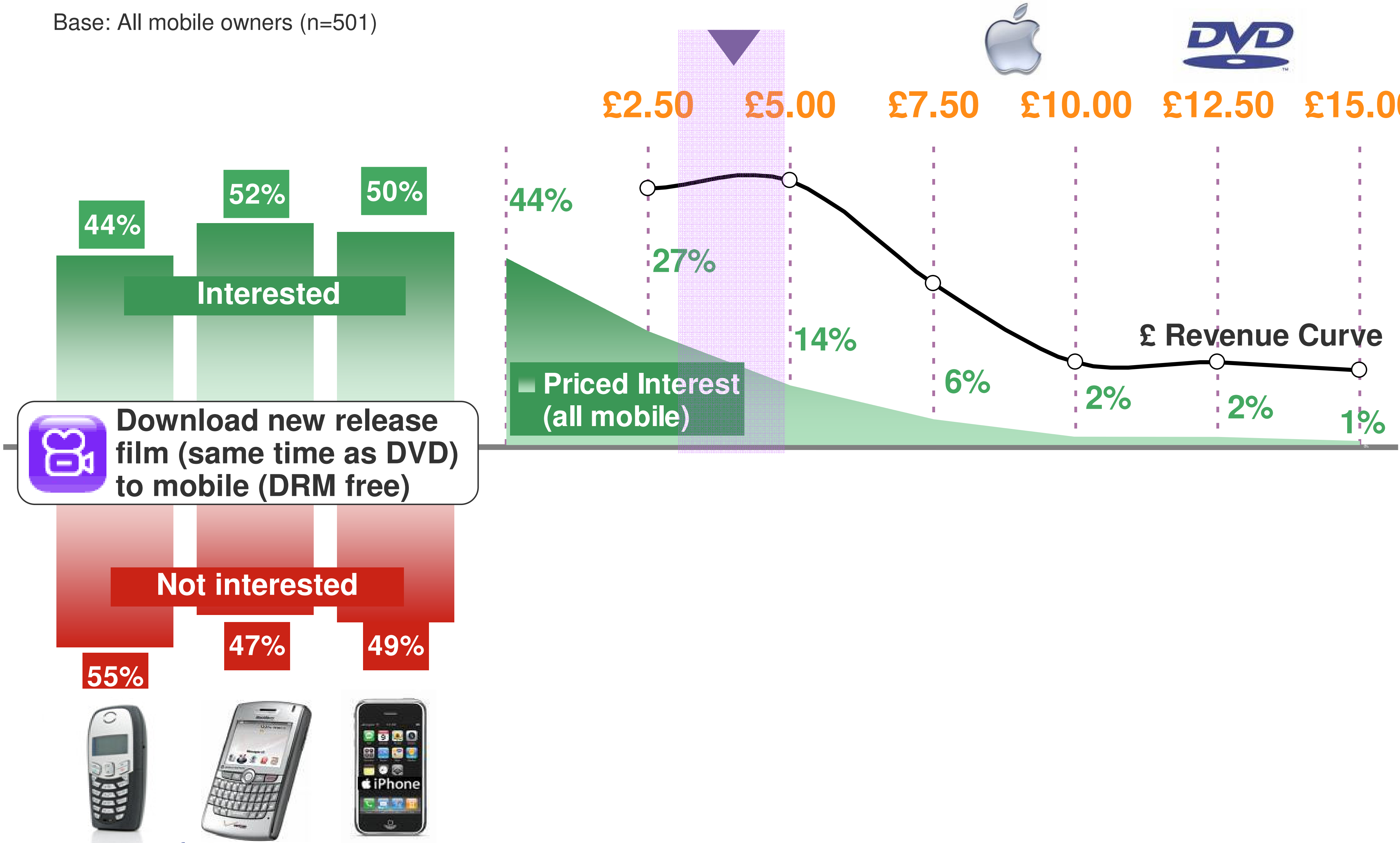
iTunes

How interested are mobile consumer in viewing new release movies on mobile?

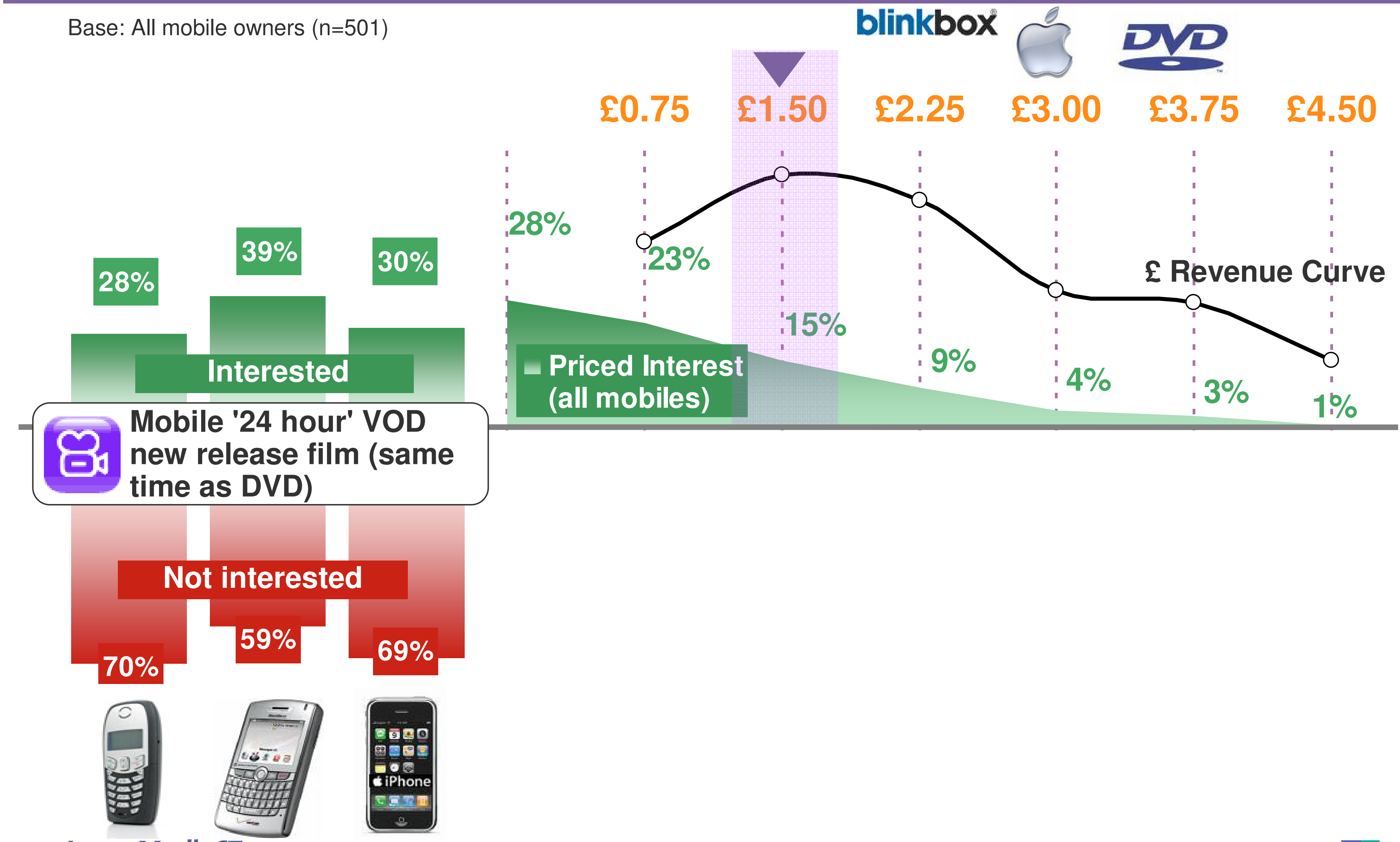
4 in 10 mobile owners interested in downloading new release films to handset

Base: All mobile owners (n=501)



Mobile VoD films have more niche appeal

Base: All mobile owners (n=501)



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High interest in receiving free location specific recommendations on request

Base: All mobile owners (n=501)

Recommendations interested in

Restaurants	**77%**
Cash Points	**73%**
Retail Shop	**70%**
Cinema	57%
Petrol Stations	55%
Public Toilets	53%
Coffee Shops	53%
Bars	48%
Hospital/doctors	46%
Music Venues	36%
Minicabs	36%
Clubs	29%

Ranking of Models

Overall Ranking (positive interest in concept)

Broadest Appeal ↕ Niche Appeal

	Free/With Ads	Pay to access	Pay to subscribe
Location	69% Recommend 55% Store offers		
Music	48% Free stream	47% per track	42% uncap stream
TV	58% Free catch up	38% per episode	
Film	48% Free films	44% per film 28% pay VoD	
Games	39% Free games	30% per game	
Books		30% per book	
Newspaper		21% Pay per copy 20% Pay per article	20% subscribe
Sports	30% Free clips	20% Pay for clips	19% subscribe

Summing up

For most owners mobile internet use lags behind fixed

Practical barriers remain: cost, screen, speed - not apathy holding back

iPhone has closed the gap between fixed and mobile

Future interest in accessing content exceeds current fixed levels

Location based info services hold broadest appeal

Significant opportunity for user located services on request

Free ad funded models consistently high

Set the benchmark levels of interest across content categories

DTO/pay to access model have strong interest

Perceived value of digital content low - how to build the value gap?

Subscription models can be compelling at right price

Lower levels of interest although willing to pay more realistic prices

For further information contact:

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Thank you