

Mobile Internet

Usage and attitudes study

May 2008

Contents

Executive summary

Key findings and conclusions

Study background, objectives and methodology

Results

Appendix

Executive summary

Consumer interest in and appetite for accessing the Internet using a mobile phone is relatively very high (c.60% consider it 'Important').

Furthermore, mobile Internet experience is considered an important consideration when purchasing a new mobile phone handset.

As mobile Internet usage becomes mainstream brands cannot afford to provide a substandard experience.

However, c.46% claim that a poor first mobile Internet experience has made them 'reluctant to access' either the site or the Internet on their mobile again with 'Slow/poor connection speed' and 'Poor site display/layout' on mobile Internet cited as key drivers of mobile Internet dissatisfaction.

Unsurprisingly, younger age groups are more active and aware of the mobile Internet but are also more discerning, demanding and less satisfied with the current mobile Internet experience.

Usage of and attitudes towards the mobile Internet also differ by country; the US are more functional/utility focused whereas the UK are more open to and interested in entertainment and content.

Brands must now work hard to ensure they provide the best possible, most relevant and engaging mobile Internet experience.

Key findings and conclusions

Overall key findings

Key finding

Conclusion

Only 2% of all participants who have purchased a phone in the last 6 months chose an iPhone; of those who are looking to buy in the next 12 months, only 4% will choose an iPhone

The vast majority of mobile phone owners don't currently have or intend to buy an iPhone. Brands who don't optimise their websites for mobile phones are therefore providing a substandard mobile Internet experience for most consumers.

65% of participants who intend to buy a new phone in the next 12 months state that it is 'Very important / 'Important' for their next mobile phone to provide a 'good mobile Internet experience'

Mobile Internet experience is an important consideration when purchasing a new mobile handset. Handset manufacturers and brands should work together to optimise the mobile Internet for the majority of consumers.

c.60% of all participants consider it 'Very important' or 'Important' to be able to access the Internet using their 'mobile phone'

The importance of accessing the Internet via a mobile phone is now mainstream; all brands should ensure that mobile users can easily access sites via a mobile phone.

Participants who intend to buy an Apple iPhone or Blackberry handset are significantly more likely to consider it 'Important' for handsets to provide a 'good mobile Internet' experience (93% and 89% consider it 'Important' respectively) than those who intend to purchase other brands.

Consumers looking for a good mobile Internet experience are more likely to choose smart phones. Other handset manufacturers should work with brands to counter this by optimising all mobile sites for mobile Internet access.

Key findings 2

Key finding

Conclusion

C.46% of participants claim that a poor first mobile Internet experience has made them 'reluctant to access' either the site or the Internet on their mobile again

A poor first mobile Internet experience is likely to deter consumers from returning to the mobile Internet. Brands must work to ensure that all consumers have a good first mobile Internet experience every time.

Younger participants are more likely to have 'had a poor first experience of visiting a site through the Internet on a mobile phone; 57% of all 16-24yr olds and 55% of all 25-34yr olds claim to have had a poor first experience. Conversely, older participants, are less likely to have had a poor first experience; only 30% of all 55-64yr olds claim to have had a poor first experience.

Younger mobile Internet users are likely to be more discerning having high expectations and demanding more from brands via the mobile Internet. Brands with younger target audiences must ensure their sites are optimised for mobile Internet access in order to increase affinity amongst this group.

'Slow/poor connection speed' and 'Poor site display/layout' on mobile Internet are cited as key drivers of mobile Internet dissatisfaction

Brands must ensure that sites are fully optimised for mobile Internet access in order to increase satisfaction and reduce the risk of lowering brand affinity.

Dissatisfaction with mobile Internet experience is highest amongst the younger age groups, in particular, 16-24yr olds. Interestingly 45-54 yr olds also express a relatively high (comparatively) level of dissatisfaction.

Younger audiences are more likely to have high expectations of technology more broadly. This is likely to impact upon levels of satisfaction with the mobile Internet. Ensuring satisfaction amongst this group is key for brands who target younger audiences.

Key findings 3

Key finding

Only 50% of participants are aware that some sites are designed 'especially to view on a mobile phone', conversely 50% are unaware.

Encouragingly, 86% of participants, are interested in knowing which sites are easily accessible on a mobile phone.

Participants are more likely visit their 'personal bank' site on a mobile 'During the workday/at work' (39%) than 'While on the move' (37%) or 'At home' (24%).

Participants are most likely to visit 'Amazon', 'BBC Sport/ESPN', 'Expedia' and 'facebook', 'While on the move' and most likely to visit 'Monster' and 'Playboy/adult' sites on a mobile at home.

Almost two thirds of all participants (65%) stated that they 'would consider' reserving & paying for 'tickets for the theatre, music etc' using the Internet on their mobile phone.

62% said they would consider ordering & paying for take away food and 59% would 'purchase/renew travel tickets'.

Conclusion

Currently levels of awareness of mobile optimised sites is low yet interest in knowing which sites are designed for mobile phone access is high.

Brands should work with dotMobi to raise awareness of mobile optimised sites.

Consumers are more likely to access personal/bank sites at work, entertainment sites while on the move and job or adult sites at home.

Brands should consider where and when users access their sites when designing and optimising for mobile Internet access.

Interest in using the Internet on a mobile phone to undertake more 'advanced' activities or those normally considered appropriate for PC Internet access is high.

Brands should consider adding additional mobile specific site functionalities.

Overall key findings 4

Key finding

Conclusion

86% of participants stated that they would be more likely to chose an airline with the mobile check in facility over one without.

Brands/companies who provide mobile Internet specific functionality will win consumers.

66% of participants stated that they would not replace their laptop with a mobile phone with the same functionality.

Interestingly, consumers don't believe that the mobile Internet (i.e. internet access on a mobile phone) will replace the laptop. Its more likely that the mobile is considered an additional, complementary Internet device which serves it's own specific purpose.

63% of all participants said they would be more likely to give up their money than their 'Mobile internet device/Blackberry' if they were mugged

Consumers place a higher value on their mobile Internet device than they do on their money.

LG owners (those who purchased a LG handset in the last 6 months) were most likely to state that they would be 'more likely' to give up their money than their mobile device (80%) if mugged. Conversely, Motorola owners were most likely to state that they would give up their mobile device (57%).

LG phone owners place a higher value on their phone than other phone owners.

Cross cultural differences

Key finding

US participants are significantly more likely to state that it is 'Very important' for their next mobile phone to provide a 'good mobile Internet experience' than their UK counterparts (26% vs. 15%)

UK participants are significantly more likely to claim that they have had a 'poor first experience of visiting a site through the mobile Internet' than US participants (51% vs. 44% respectively)

US participants are significantly less likely to be aware that some sites are designed 'especially to view on a mobile phone', than UK participants (44% vs. 56% respectively)

Those in the US are significantly more likely to claim that they would visit their 'personal bank' site on a mobile phone (76% vs. 66%). In the UK, however, participants are significantly more likely to claim they would visit 'Amazon', 'BBC sport', and 'facebook' on a mobile phone.

Conclusion

US consumers consider mobile Internet experience more important when purchasing a new handset than UK consumers.

UK mobile Internet users are possibly more exposed to and experienced in the mobile Internet. Consequently expectations are higher and therefore brands need to work slightly harder to provide a good experience.

Awareness of mobile sites is lower in the US than the UK.
dotMobi and brands need to work together to raise awareness of the key benefits of mobile optimised site.

US consumers appear to be interested in more functional/utility oriented sites than UK consumers who by contrast appear to be more interested in entertainment sites.

Cross cultural differences 2

Key finding

UK participants are more likely to claim that they would visit brand sites while 'on the move' than their US counterparts.

US participants are significantly more likely to claim that they would visit their 'personal bank' 'during the workday/whilst at work' than those in the UK (42% vs. 36%).

UK participants are significantly more likely to consider purchasing/renewing 'travel tickets' than US participants (63% vs. 55%).

They are also significantly more likely to consider ordering & paying for 'clothes, books, CDs DVDs etc' and 'groceries' over the Internet on their mobile phone.

Conclusion

Interestingly, UK consumers seem more likely to use the mobile Internet when on the move whereas US consumer would consider accessing certain sites, e.g. personal bank, at work. Is this because certain sites are more likely to be blocked in the US workplace or perhaps US consumers are more concerned with Internet security at work?

UK consumers appear more receptive to undertaking more 'advanced' mobile Internet activities than US consumers. Is this due to age and experience of mobile Internet usage in each market respectively.

Brands should adapt mobile site functionality per market.

Study background, objectives and methodology

Background

There exists a dearth of information around attitudes towards and usage of the mobile Internet; clients have little information, we have a little more but ultimately there still remain many unanswered questions.

To generate real 'newsworthy' insight into consumer usage and attitudes towards the mobile Internet AKQA and dotMobi have undertaken an online Mobile Usage and Attitudes Study.

Findings from the study will be fed directly into subsequent mobile Internet projects, additionally, learnings will be used to raise awareness of and show the value in the dotMobi domain.

The study is also designed to help position dotMobi and AKQA as Digital thought leaders. For this reason the study has been designed with a PR component.

Research objectives – what did we want to find out?

The research was designed to understand/explore:

- Mobile ownership & general mobile usage
- Usage of and attitudes towards the mobile Internet;
 - Propensity to use
 - Frequency of usage
 - Motives/barriers to usage
- Functional requirements for mobile sites; desirable/required content and functionality
- Future digital predictions
- Initial response/reaction to dotMobi concept i.e. sites designed specifically for access using a mobile device

Sample – who did we speak to?

participants were representative of online populations in both the UK and US respectively i.e. age, gender, working status etc.

Total sample size = 2,019

UK, n = 1,009

US, n = 1,010

participants quotas were set based on claimed mobile Internet usage frequency so as to ensure that responses were equally representative of novice and expert users alike.

Methodology – how did we undertake the research?

Email invites were distributed to members of an online research panel* who met the sample criteria.

participants were asked to complete a 30 question, 5-10min self completion questionnaire.

Fieldwork dates

19th - 28th May 2008

*Panellists provided by Research Now; US panel, 340,000, UK panel, 400,000

Reporting note

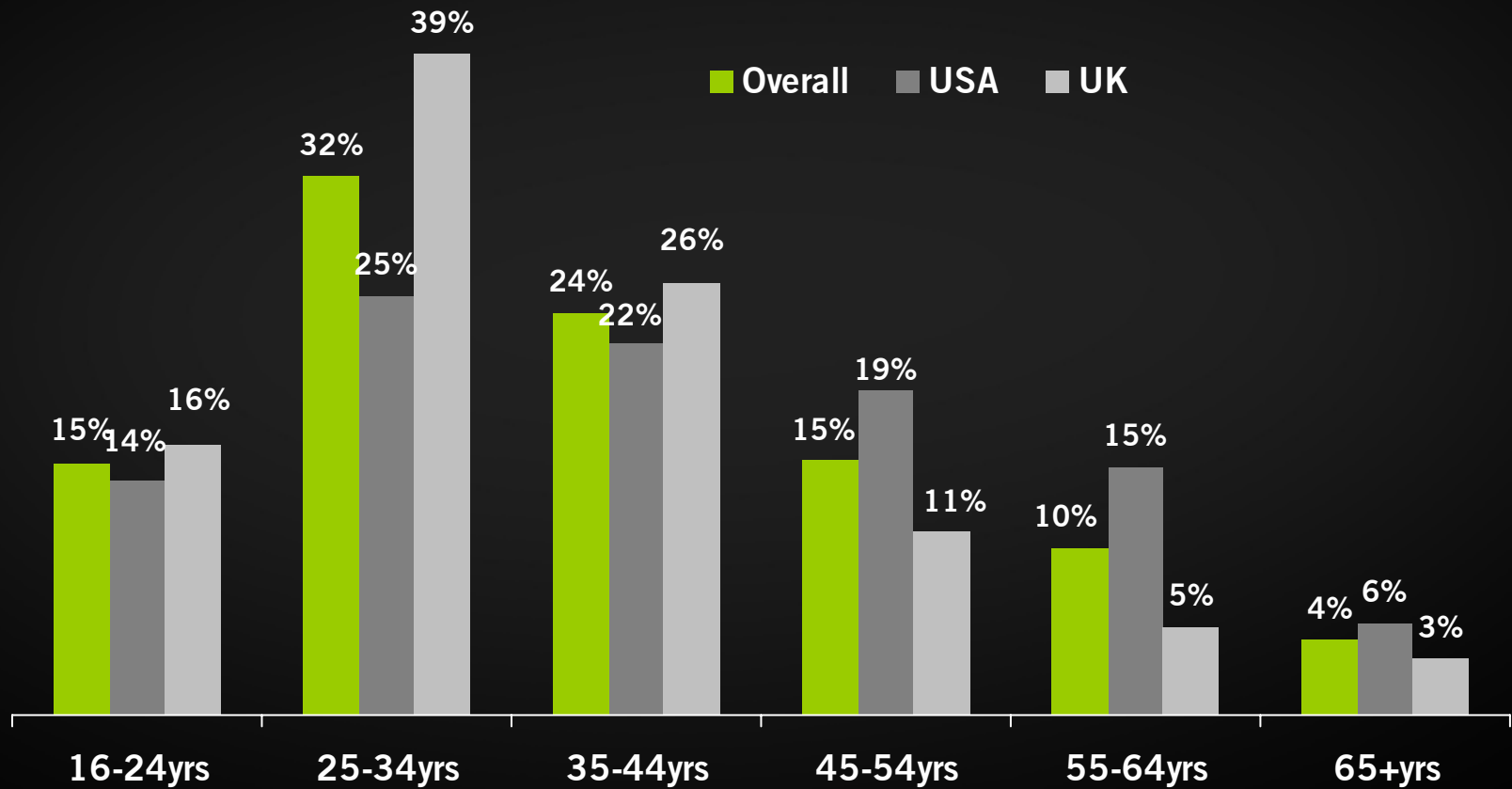
Where results between groups differ (e.g. US vs. UK) statistical significance has been tested for at 95% confidence level*.

Results which are statistically different at 95% confidence level have been highlighted throughout the presentation.

*We are 95% certain that observed differences are 'real' differences i.e. have not occurred by chance or through sampling error.

Participant background

Age



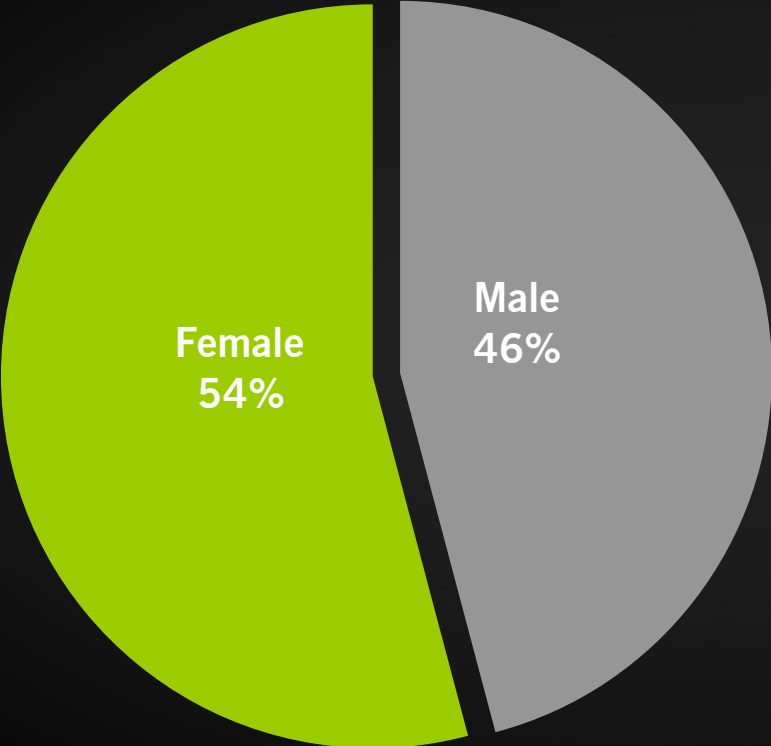
Q1. Please indicate which age band you fall under

Base: 2,019, US n = 1,010, UK n = 1,009

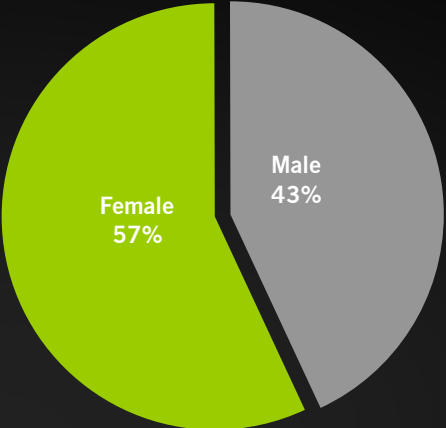
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Gender

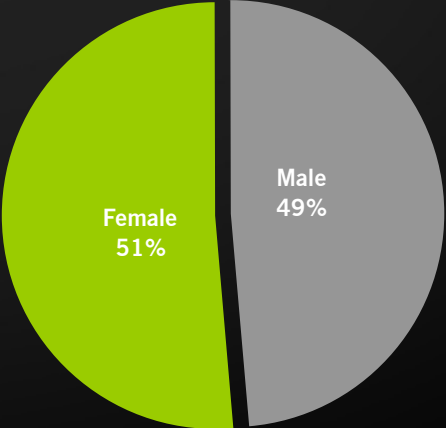
Overall



US

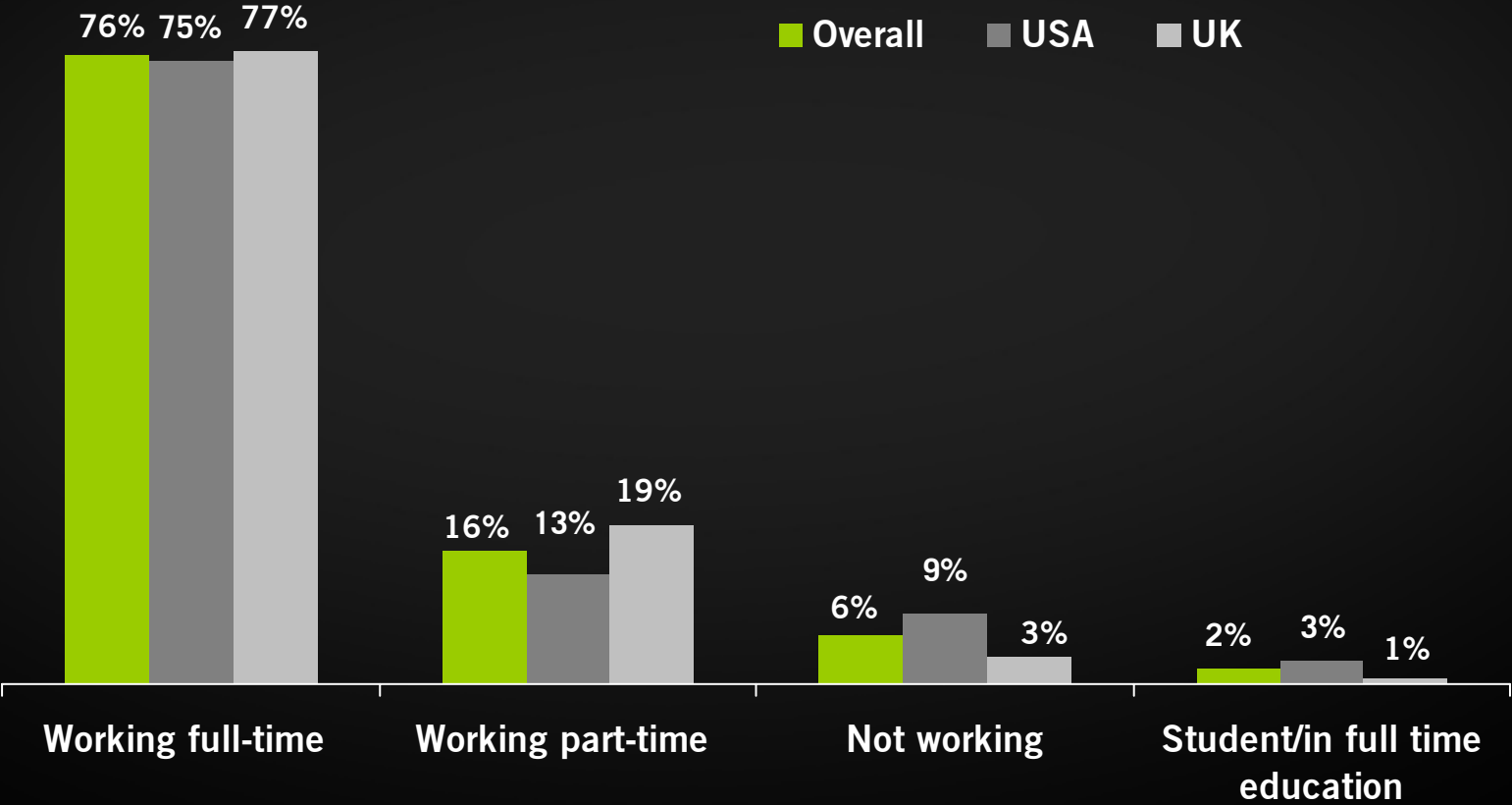


UK



Q2. Could you please tell us your gender?
Base: 2,019, US n = 1,010, UK n = 1,009
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

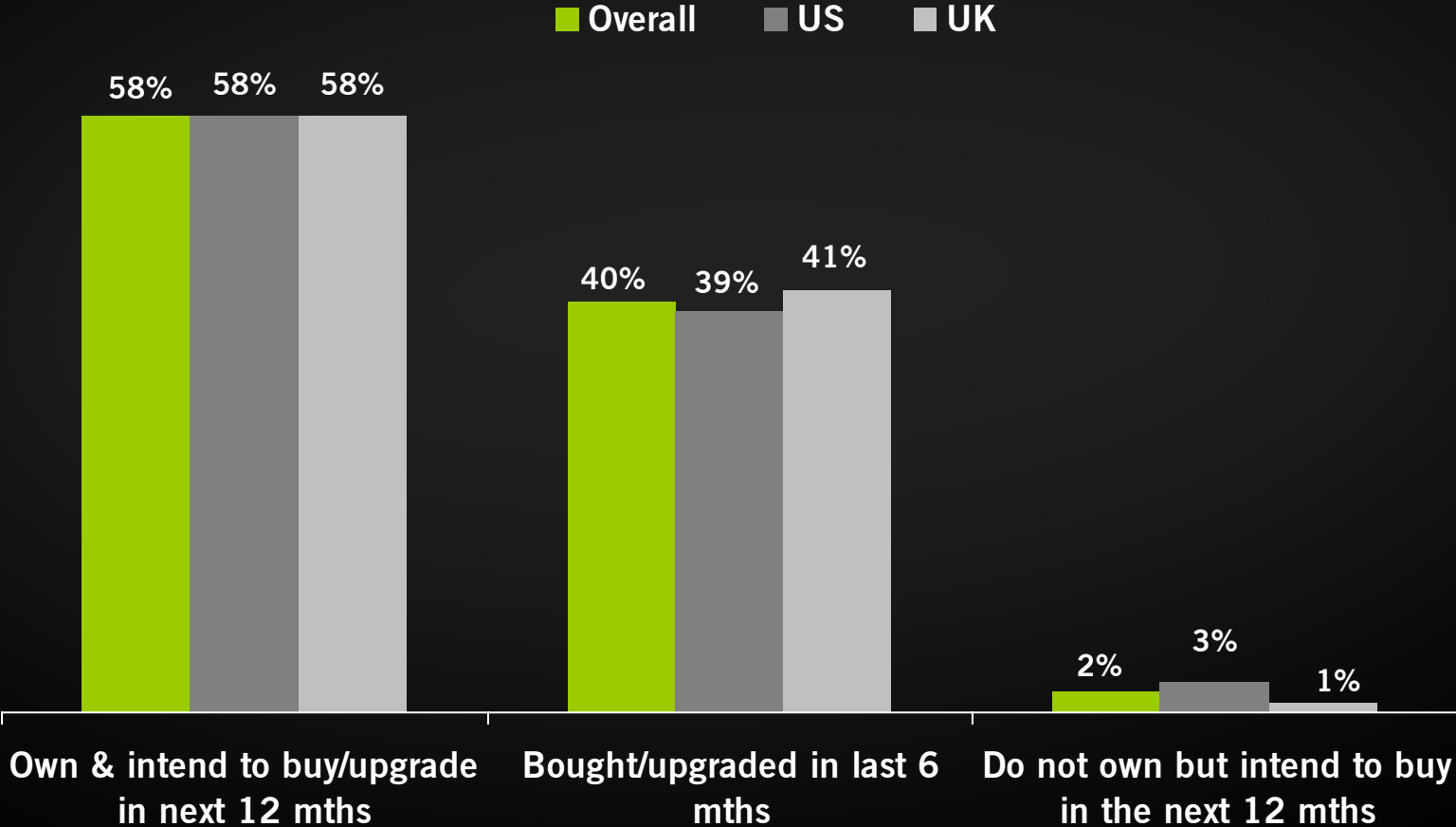
Employment status



Q2a. Could you please tell us your working status?
Base: 2,019, US n = 1,010, UK n = 1,009
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

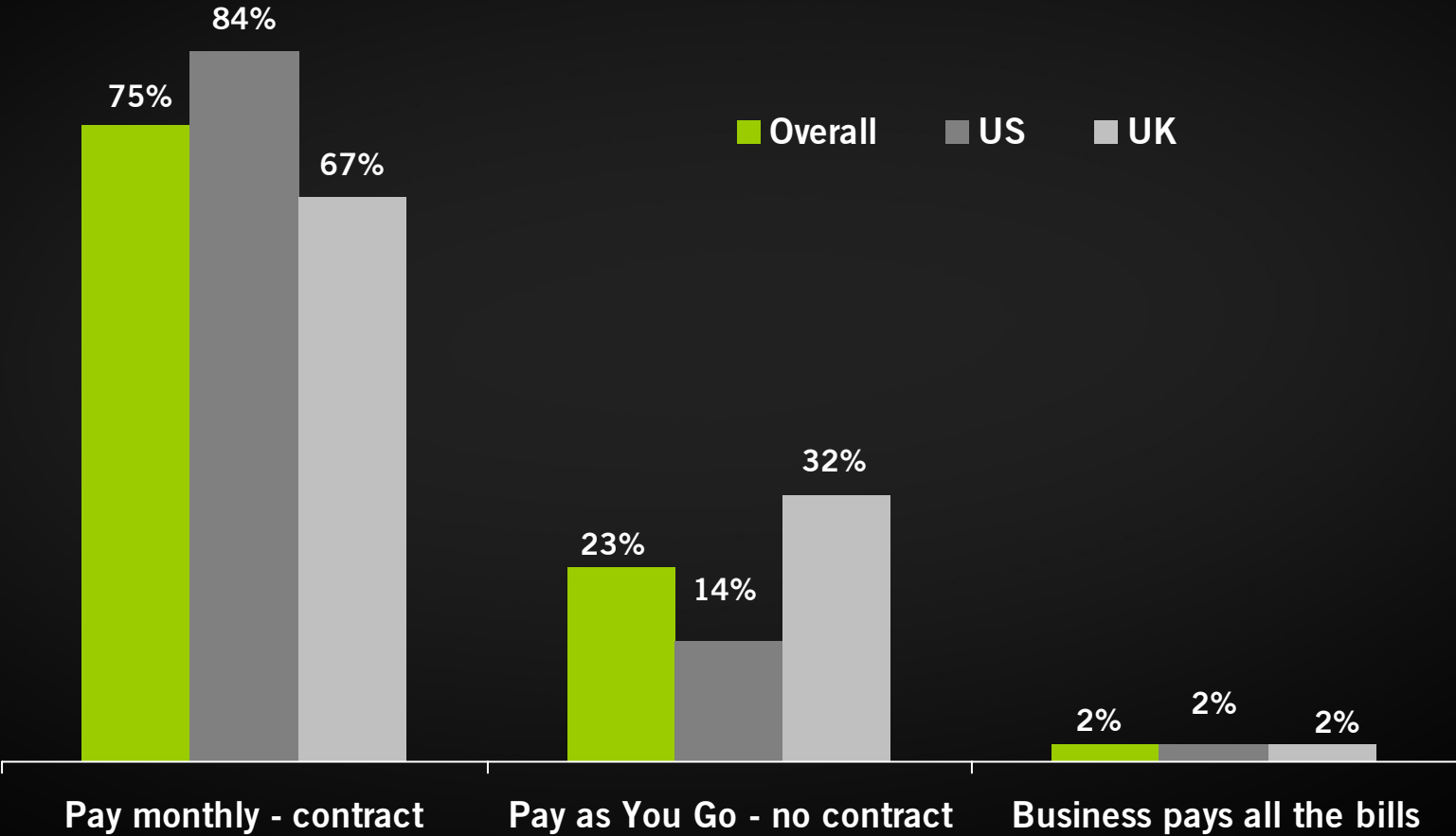
Mobile ownership and usage

Mobile status



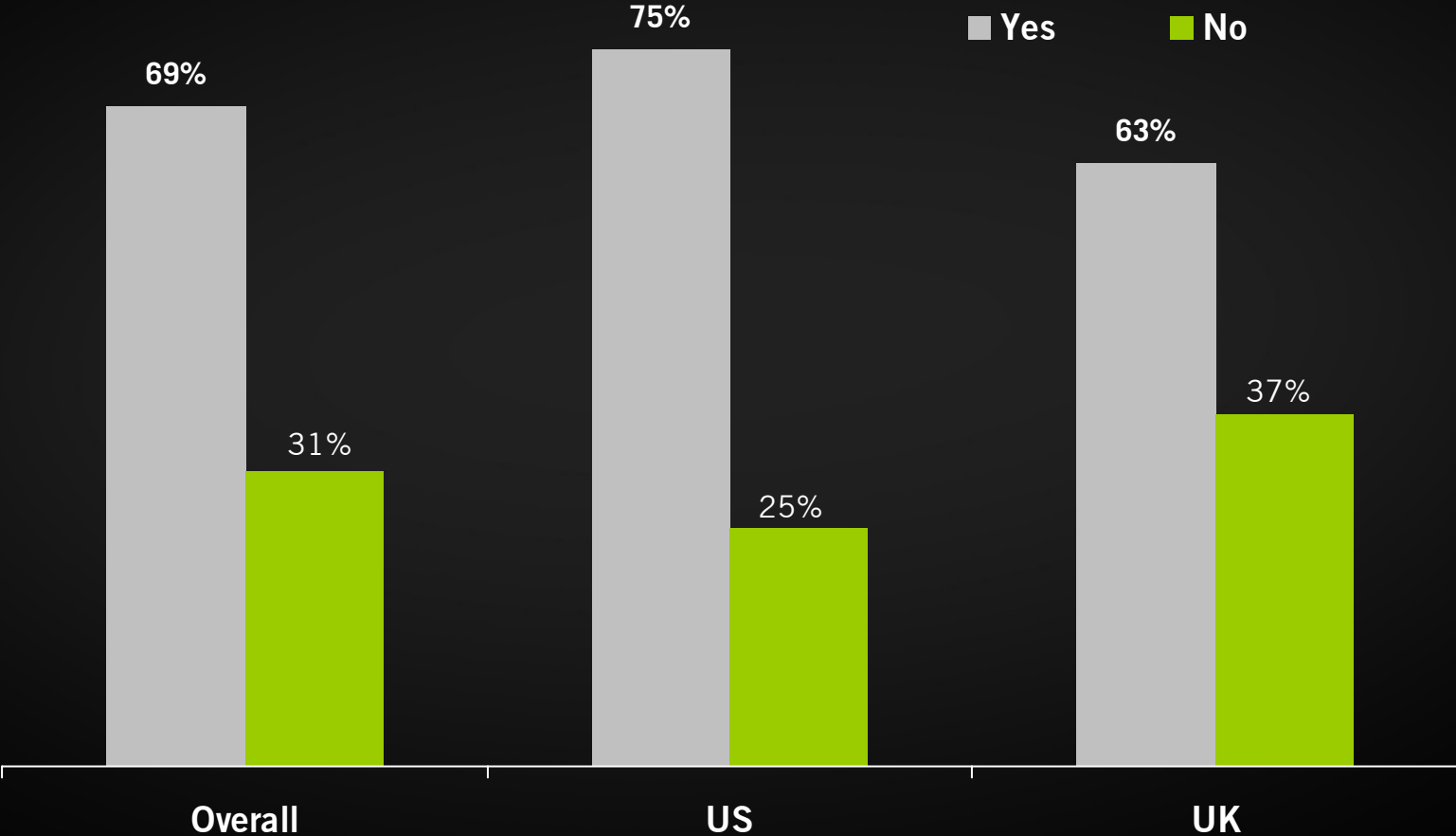
Q3. Which of the following statements best describes you?
Base: 2,019, US n = 1,010, UK n = 1,009
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Mobile payment method



Q4. How do you pay for your mobile phone usage?
Base: 1,979, US n = 977, UK n = 1,002
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Business users – choice of handset?*

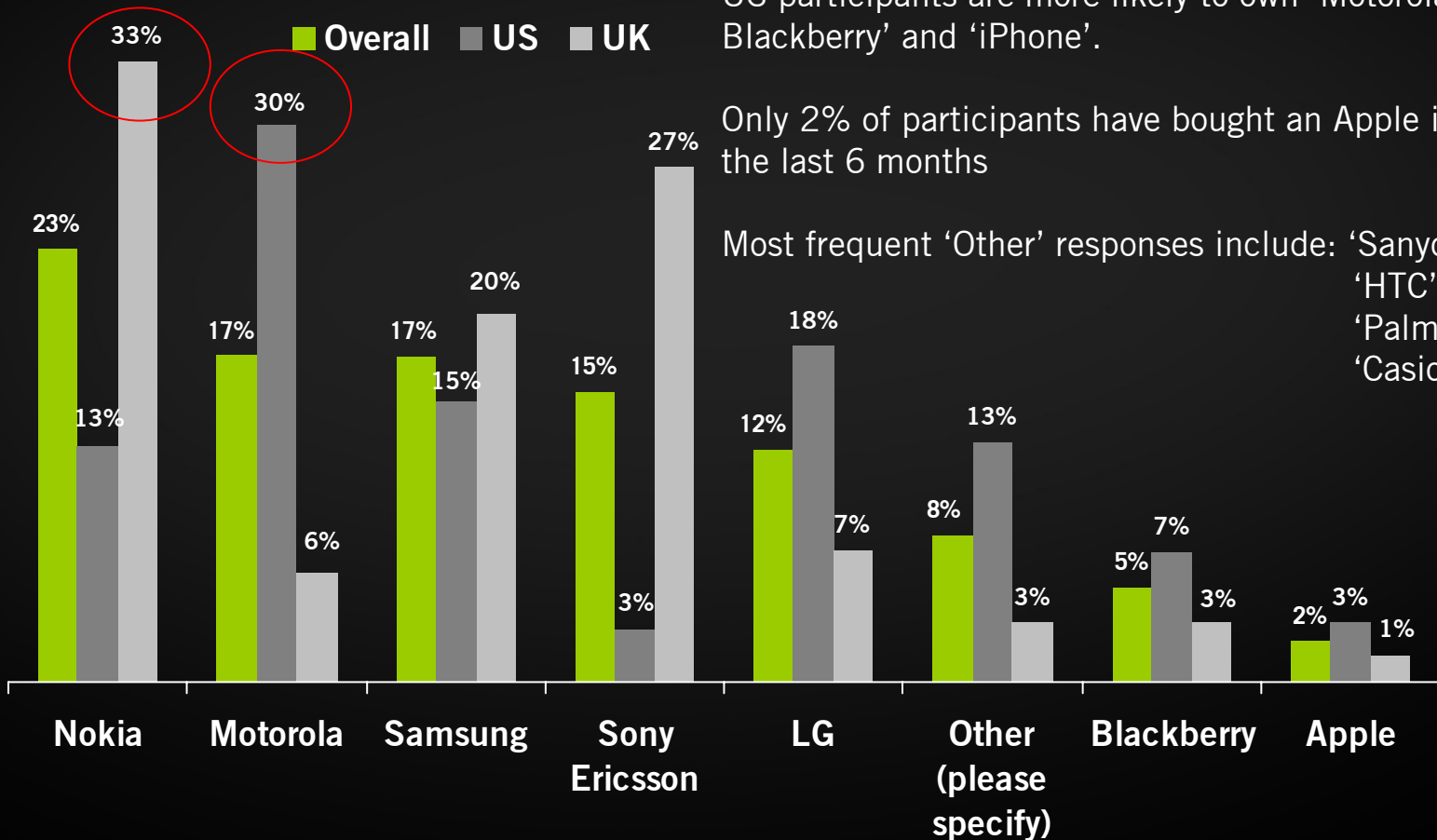


*N.B. Base size very low, please interpret with caution

Q5. Do you have a choice of which mobile handset your business provides you with?
Base: 39, US n = 20 UK n = 19
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Handset ownership – purchased in last 6 months

Handset ownership differs considerably by country. UK participants are more likely to have purchased 'Nokia', 'Sony Ericsson' or 'Samsung'. US participants are more likely to own 'Motorola', 'LG, Blackberry' and 'iPhone'. Only 2% of participants have bought an Apple iPhone in the last 6 months

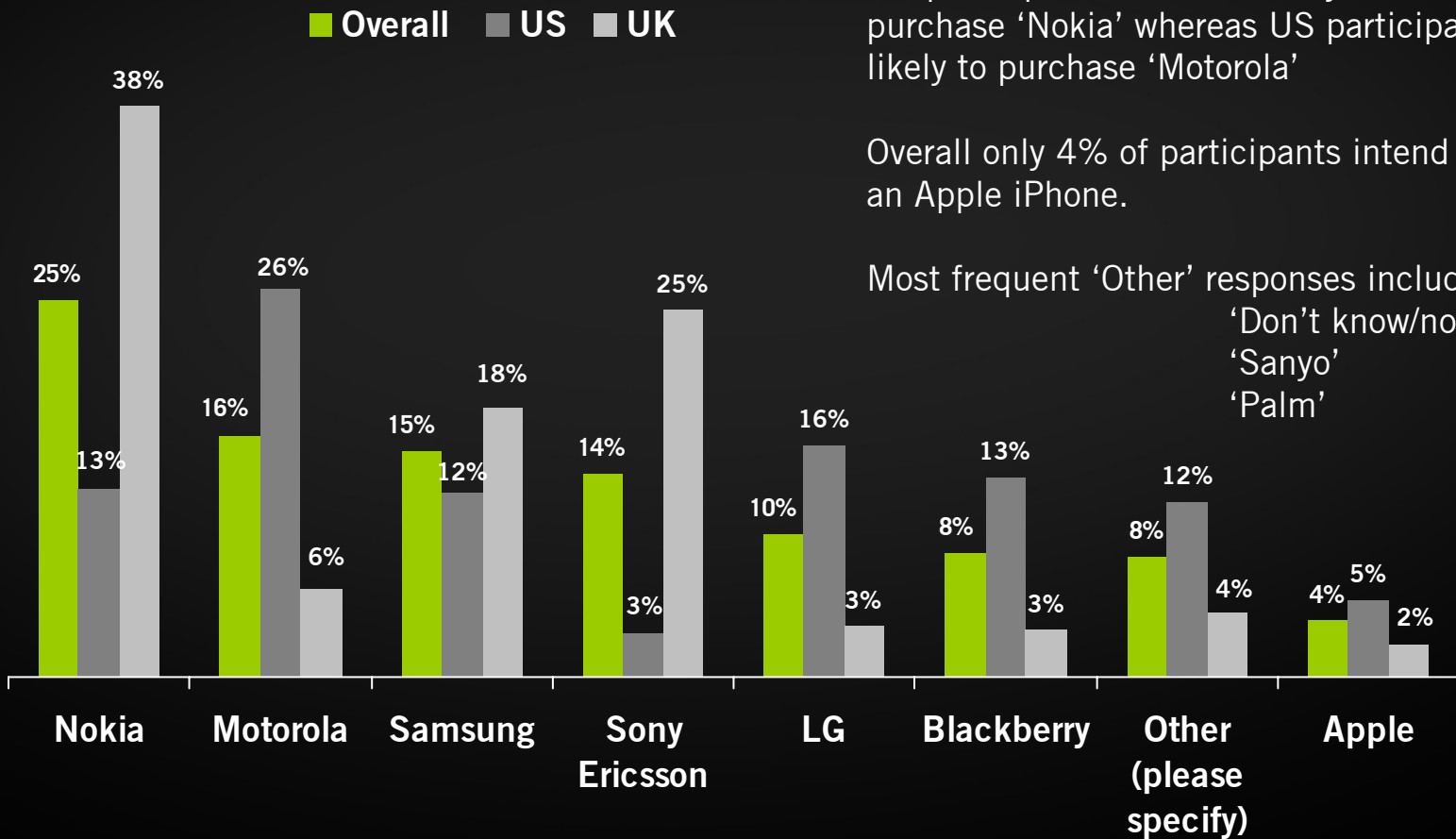


Only 2% of participants have bought an Apple iPhone in the last 6 months

Most frequent 'Other' responses include: 'Sanyo', 'HTC', 'Palm', 'Casio'

Q6. What brand/make of mobile phone have you recently purchased?
 Base: 808, US n = 393 UK n = 415
 Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Purchase intent – next 12 months



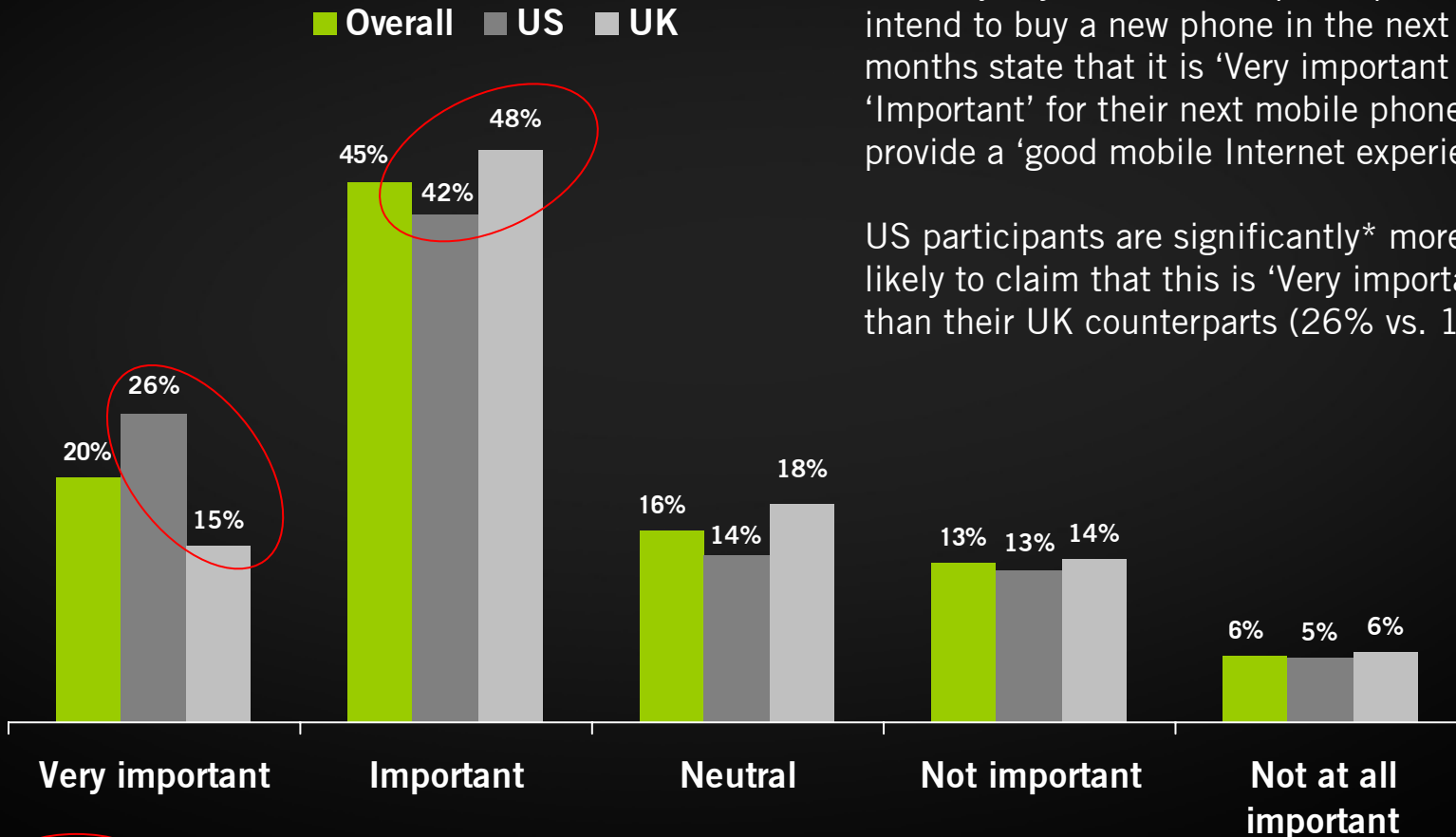
As with recent handset brand purchase, claimed purchase intent differs by country. UK participants are most likely to intend to purchase 'Nokia' whereas US participants are most likely to purchase 'Motorola'

Overall only 4% of participants intend to purchase an Apple iPhone.

Most frequent 'Other' responses include:
 'Don't know/not sure'
 'Sanyo'
 'Palm'

Q7. What brand/make of mobile phone do you intend to purchase in the next 12 months?
 Base: 1,199, US n = 612 UK n = 587
 Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Importance of mobile Internet experience on handset purchase decision



The majority, (65%) of all participants who intend to buy a new phone in the next 12 months state that it is 'Very important / 'Important' for their next mobile phone to provide a 'good mobile Internet experience'

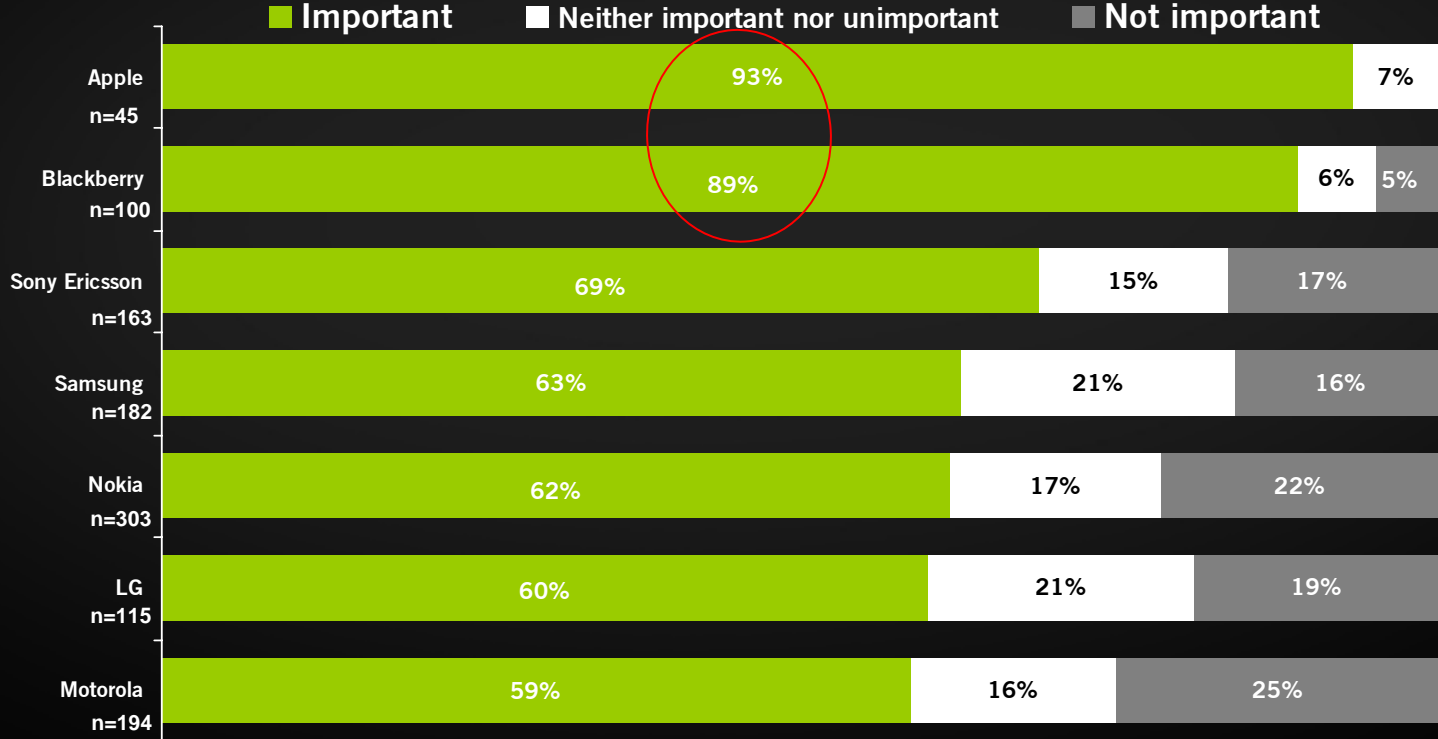
US participants are significantly* more likely to claim that this is 'Very important' than their UK counterparts (26% vs. 15%)

Red circle = *Significant at 95%

Q8. When you purchase your next mobile phone how important do you think it will be for the handset to provide a good mobile Internet experience? (only asked of those who stated that they intended to purchase in next 12 months)
 Base: 1,199, US n = 612 UK n = 587
 Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Importance of mobile Internet experience by handset brand purchase intent next 12 months

participants who intend to buy an Apple iPhone or Blackberry handset are significantly* more likely to consider it 'Important' for handsets to provide a 'good mobile Internet' experience (93% and 89% consider it 'Important' respectively).



Q8. When you purchase your next mobile phone how important do you think it will be for the handset to provide a good mobile Internet experience? (only asked of those who stated that they intended to purchase in next 12 months) by Q7. What brand/make of phone do you intend to purchase in the next 12 months

Base: 1,199

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

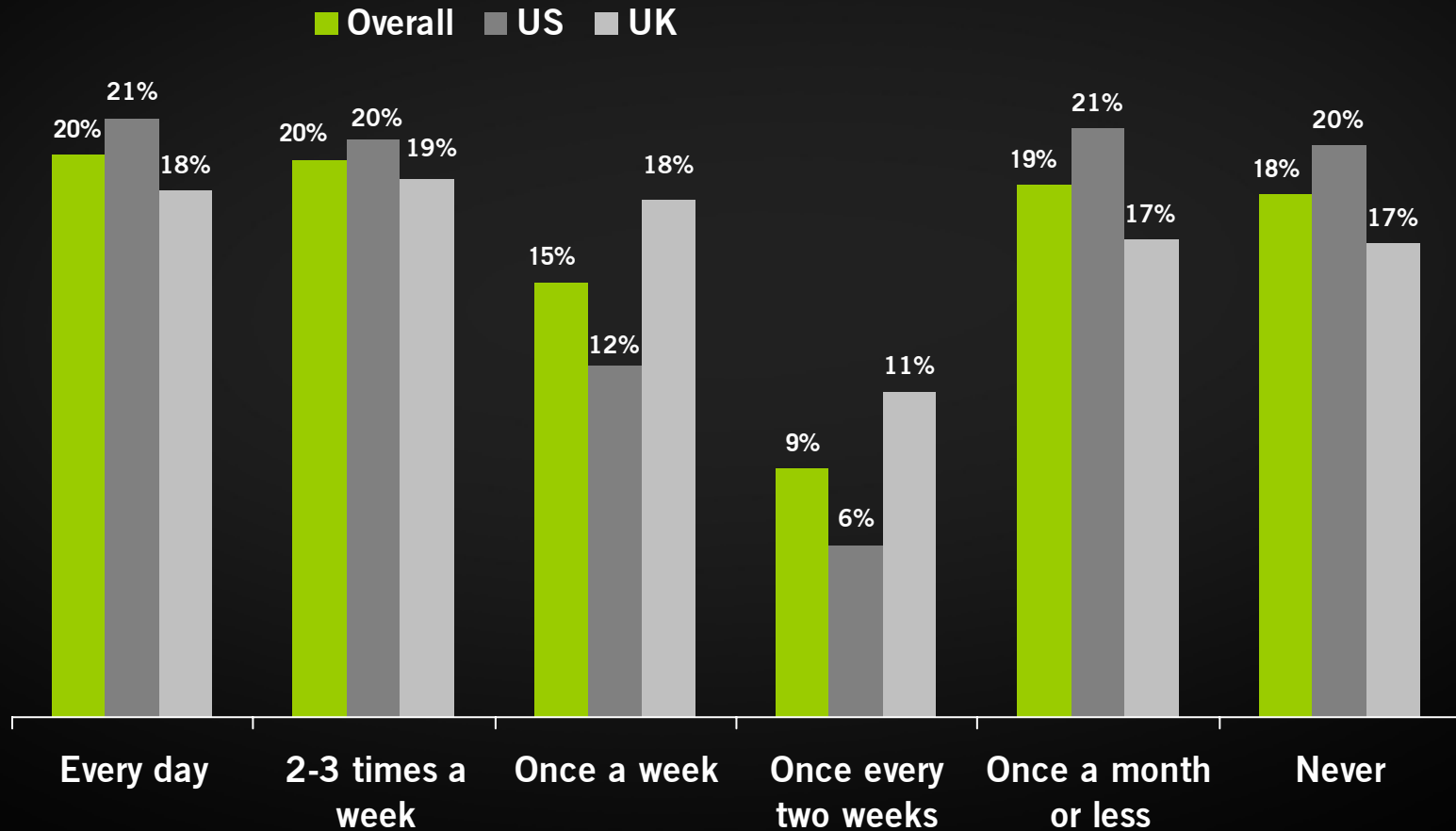
*Significant at 95%



Mobile Internet usage and attitudes

Frequency of mobile Internet usage*

*N.B. Quotas were applied in order to ensure representation from participants with all levels of mobile Internet experience and exposure



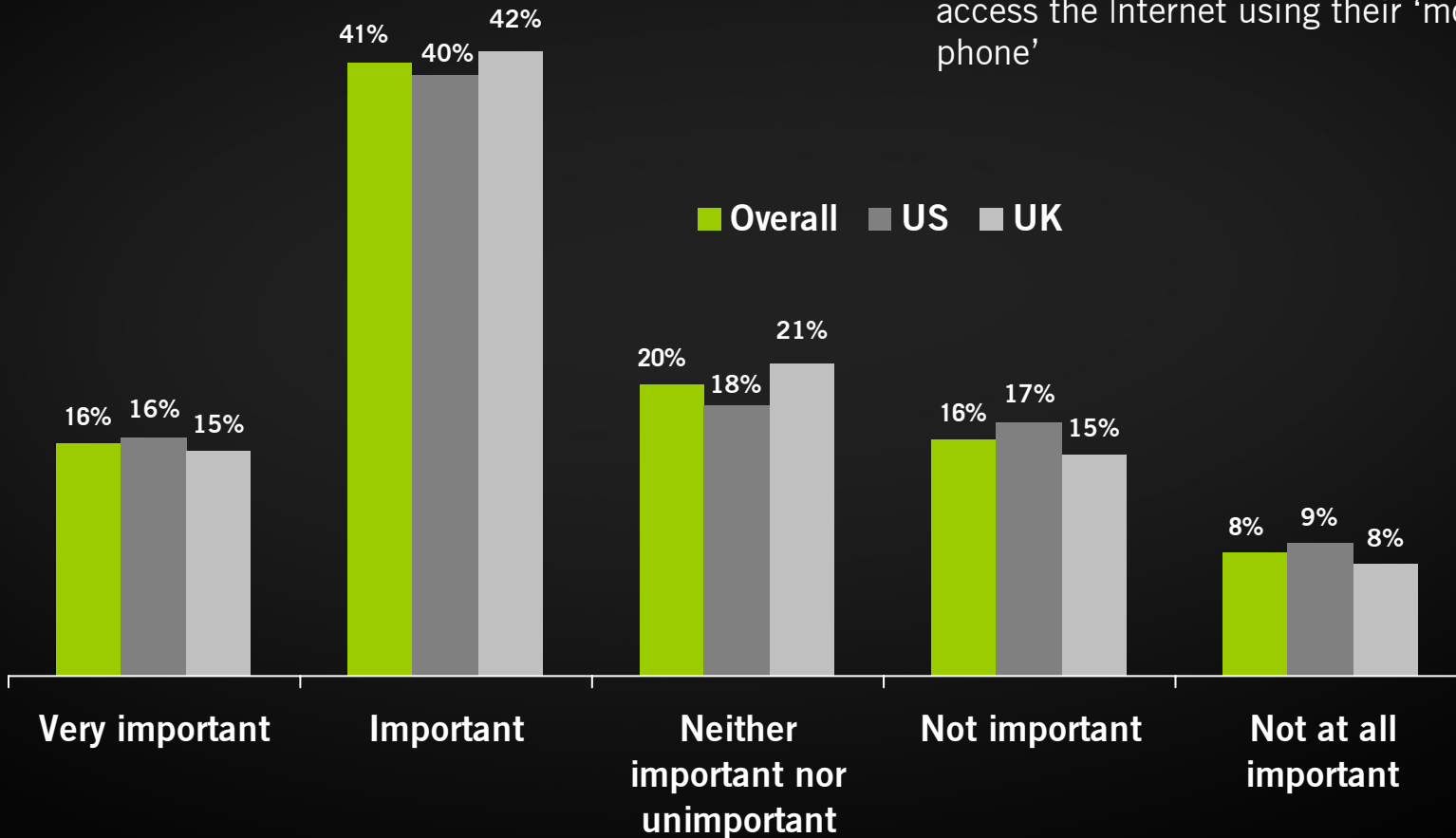
Q9. Which of the following best describes how regularly you access the Internet using your mobile phone?

Base 2,019, US n = 1,010 UK n = 1,009

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Importance of mobile Internet access

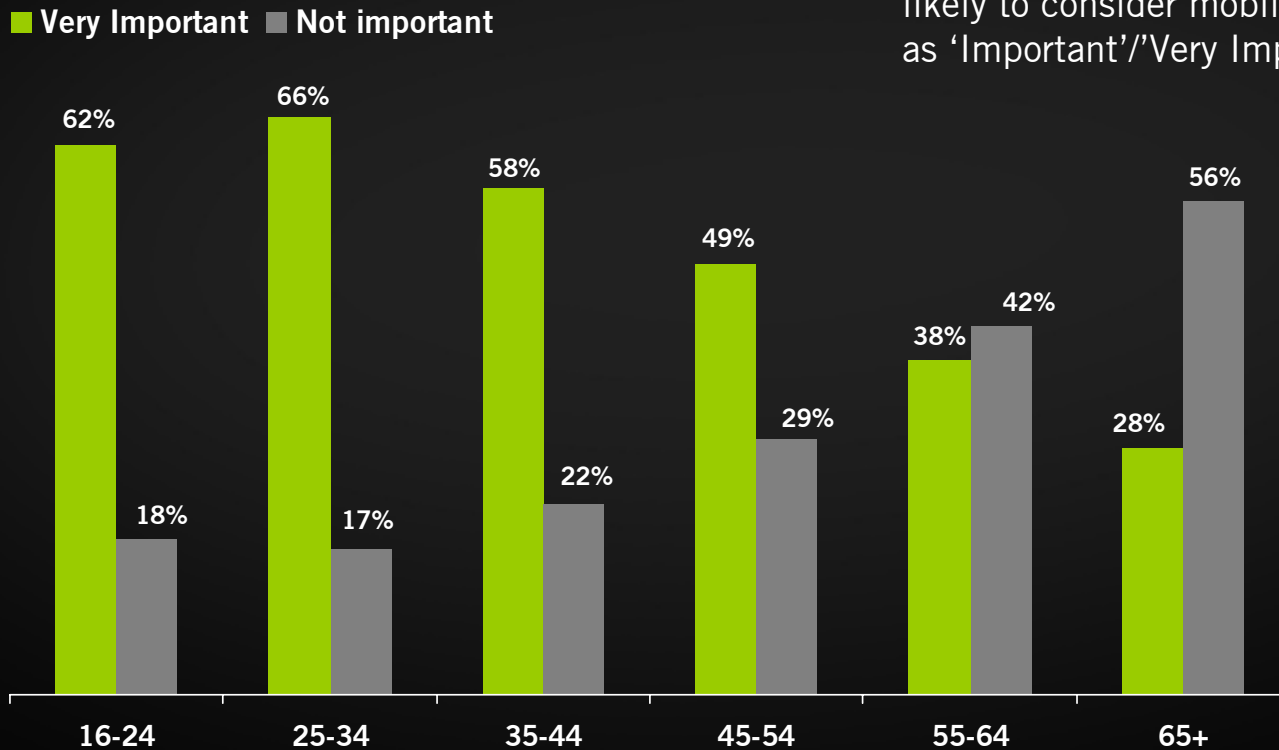
c.60% of all participants consider it 'Very important'/ 'Important' to be able to access the Internet using their 'mobile phone'



Q15. How important is it to be able to access the Internet using your mobile phone?
Base 2,019, US n=1,010 UK n = 1,009
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Importance of mobile Internet access by age

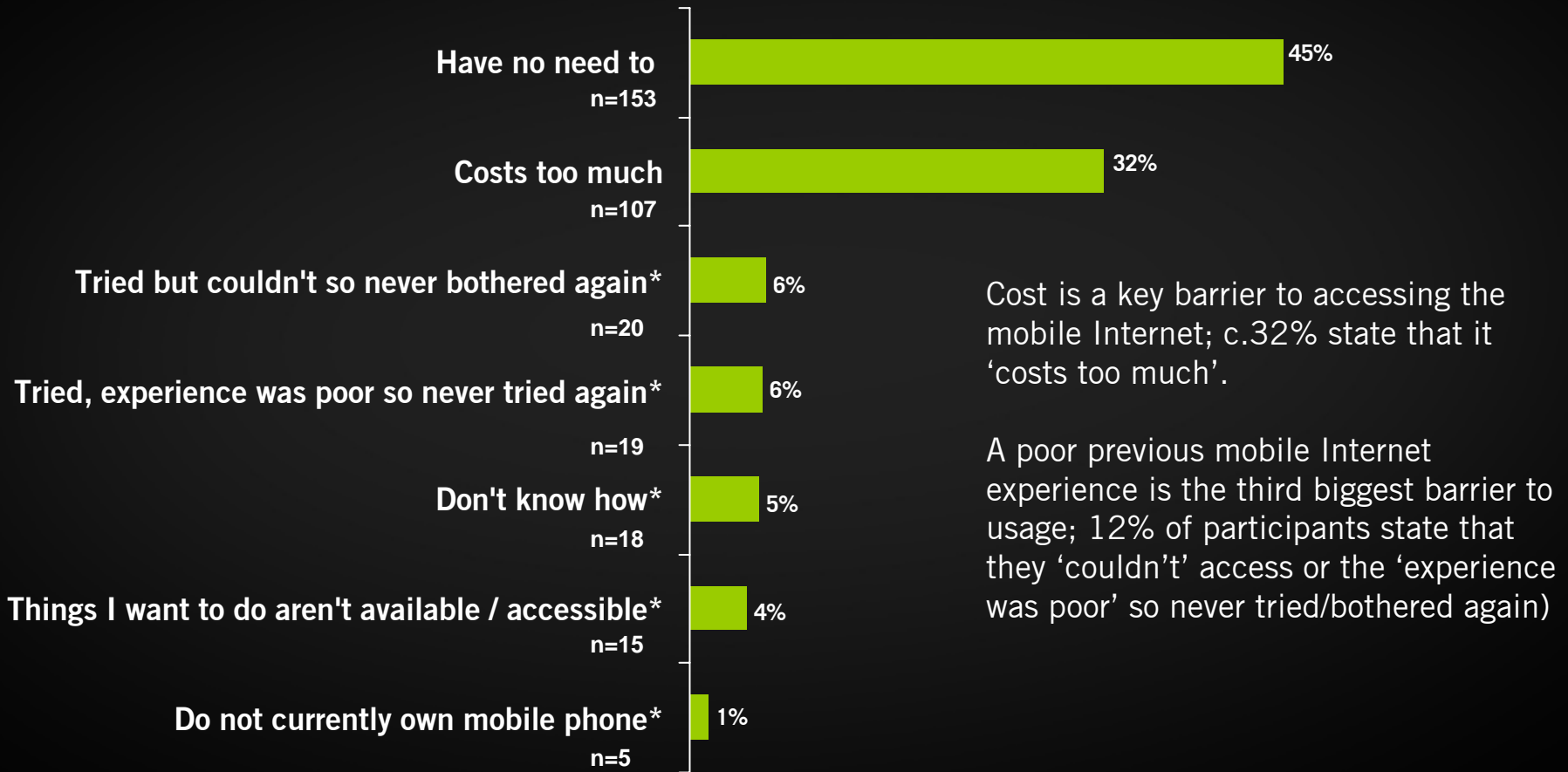
The importance of being able to access the mobile Internet decreases with age. Younger participants (<54 yrs), more likely to consider mobile Internet access as 'Important'/'Very Important'



Q15. How important is it to be able to access the Internet using your mobile phone?
Base 2,019
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Non mobile Internet users

Main reason for not accessing the mobile Internet



*N.B. Base size very low, please interpret with caution

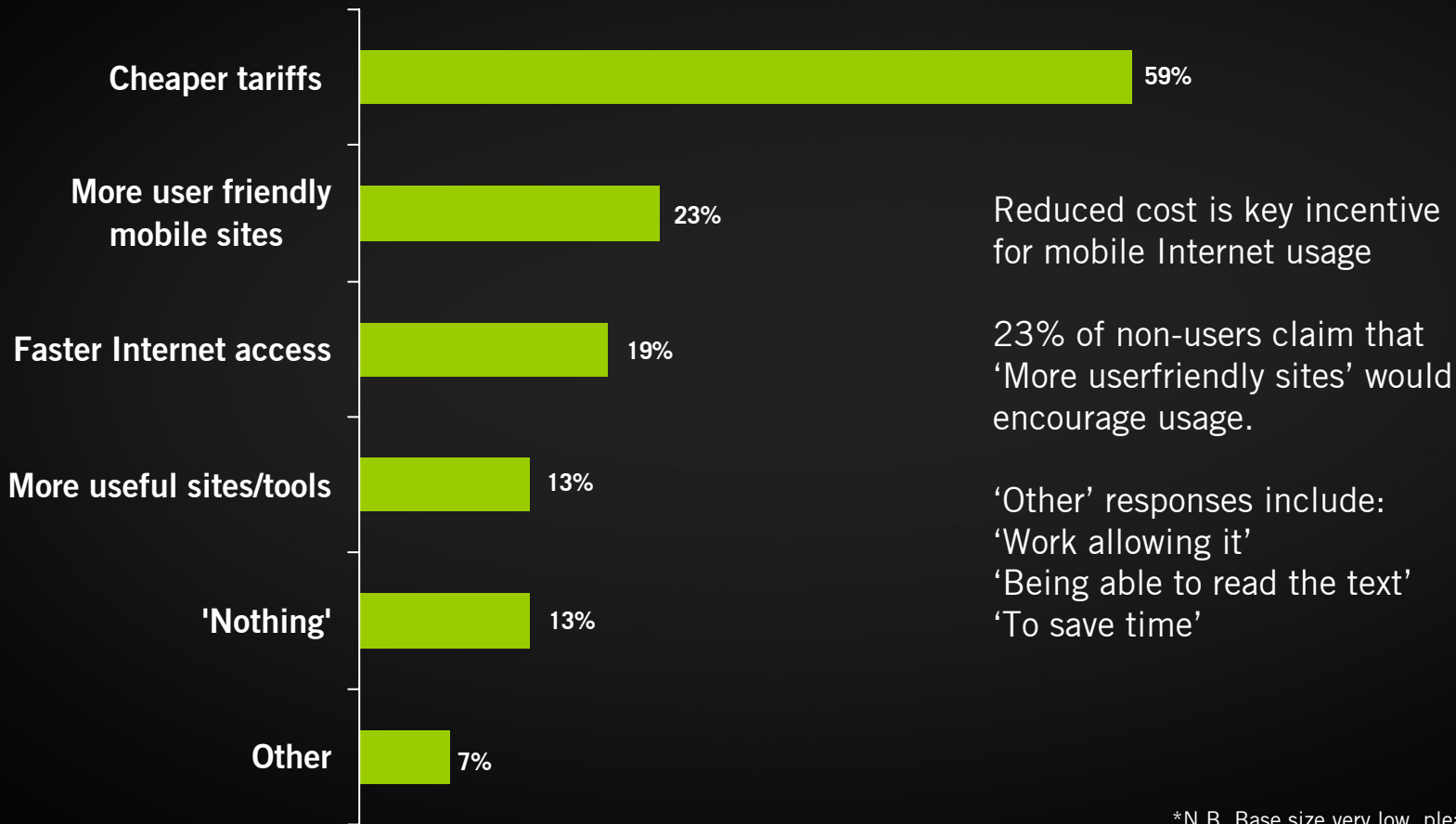
Q10. Which of the following best describes the main reason why you have never accessed the Internet using a mobile phone?

Excludes 'Other'

Base: 369 US n =202 UK n = 167

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Key incentive for accessing the mobile Internet



*N.B. Base size very low, please interpret with caution

Q12. What do you think would make you want to access the Internet using your mobile phone? (multiple response option)

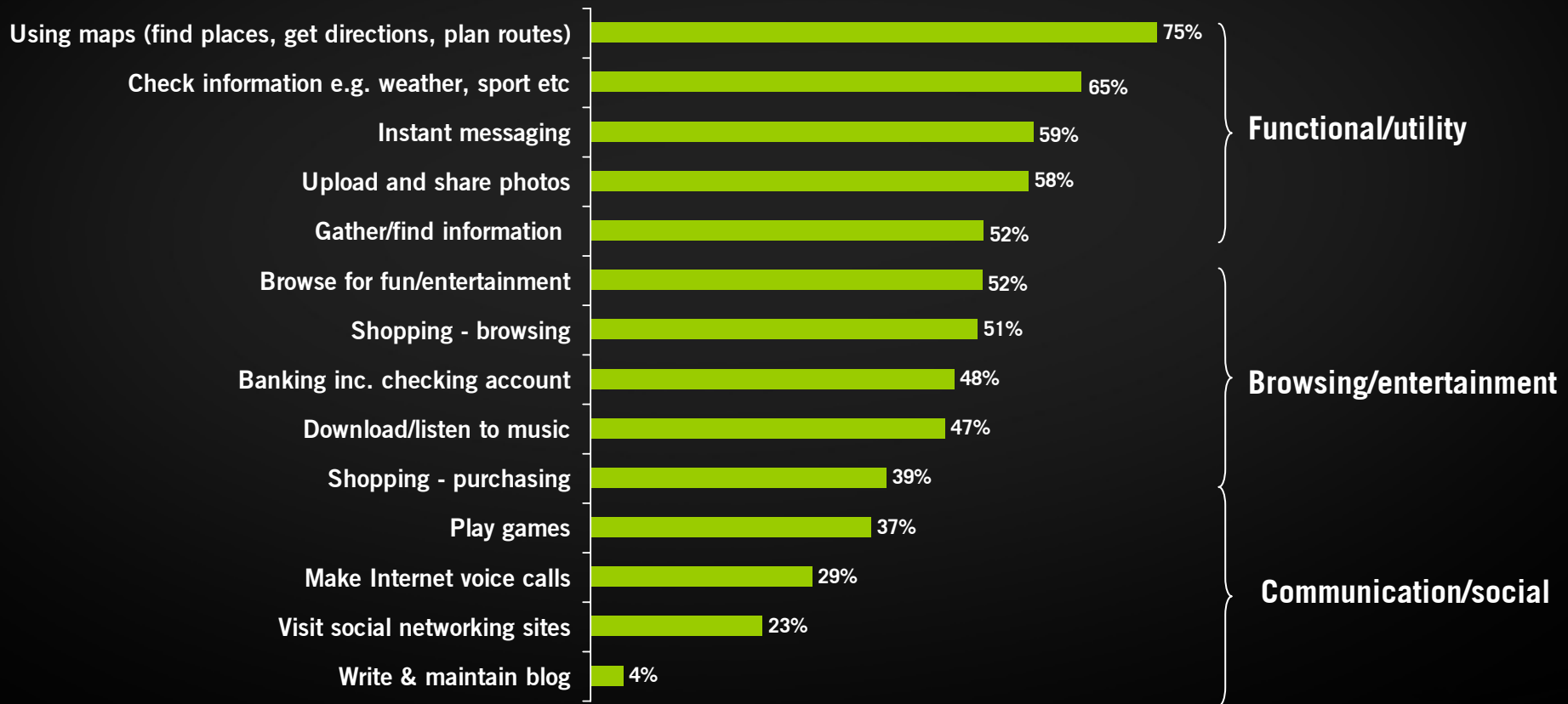
Base: 369 US n = 202 UK n = 167

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Activities 'would consider' using mobile Internet for

participants are most likely to consider undertaking functional/utility based activities via the mobile Internet (e.g. Using maps, 75% 'would consider').

Interestingly, participants also express a desire to use the mobile Internet for Browsing for fun/entertainment (52%). Communication and generating content are less interesting for participants at present.

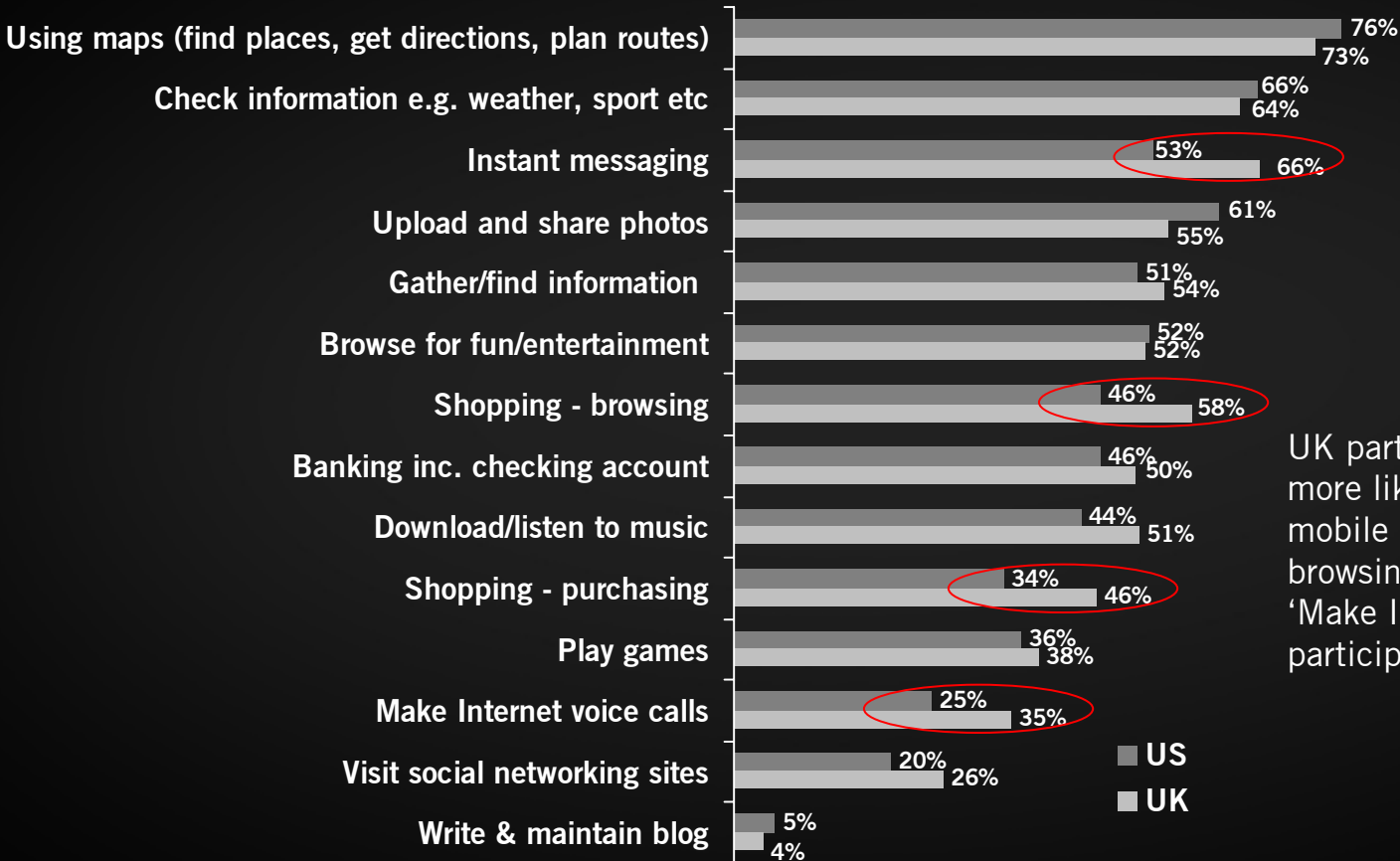


Q14. If you were to use the Internet on your mobile phone, assuming the following activities were easy to access/achieve, which do you think you would or would not consider using the Internet on your mobile phone for? (Multiple response option)

Base 369, US n =202 UK n = 167

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Activities 'would consider' using mobile Internet for by country



UK participants are significantly* more likely to consider using the mobile Internet for IM, 'Shopping – browsing & purchasing', and to 'Make Internet voice calls' than US participants

= *Significant at 95%

Q14. If you were to use the Internet on your mobile phone, assuming the following activities were easy to access/achieve, which do you think you would or would not consider using the Internet on your mobile phone for?
Base 369, US n =202 UK n = 167

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Mobile Internet users

Activities undertaken via mobile Internet



participants are most likely to claim that they use the mobile Internet for functional activities (e.g. 'Checking information', 45% etc).

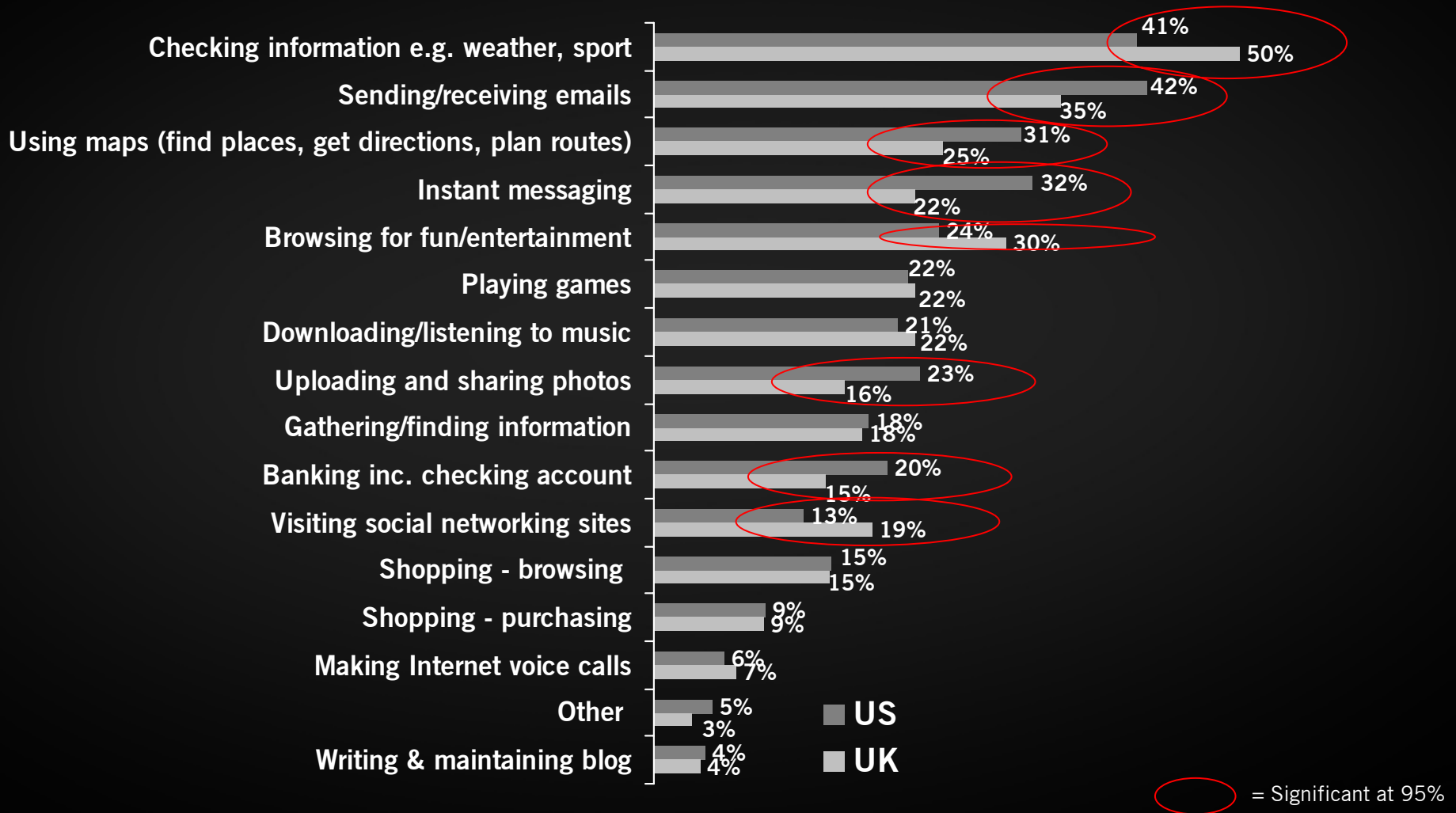
They are also using to communicate ('Sending/receiving emails', 38%) Entertainment features relatively highly, 27% claim that they use the mobile Internet for 'browsing for fun/entertainment'

Q16. Thinking about when you access the Internet using your mobile phone, typically, what do you use the Internet on your mobile phone for? (Multiple response option)

Base 1,650, US n = 808 UK n = 842

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Activities undertaken via mobile Internet by country

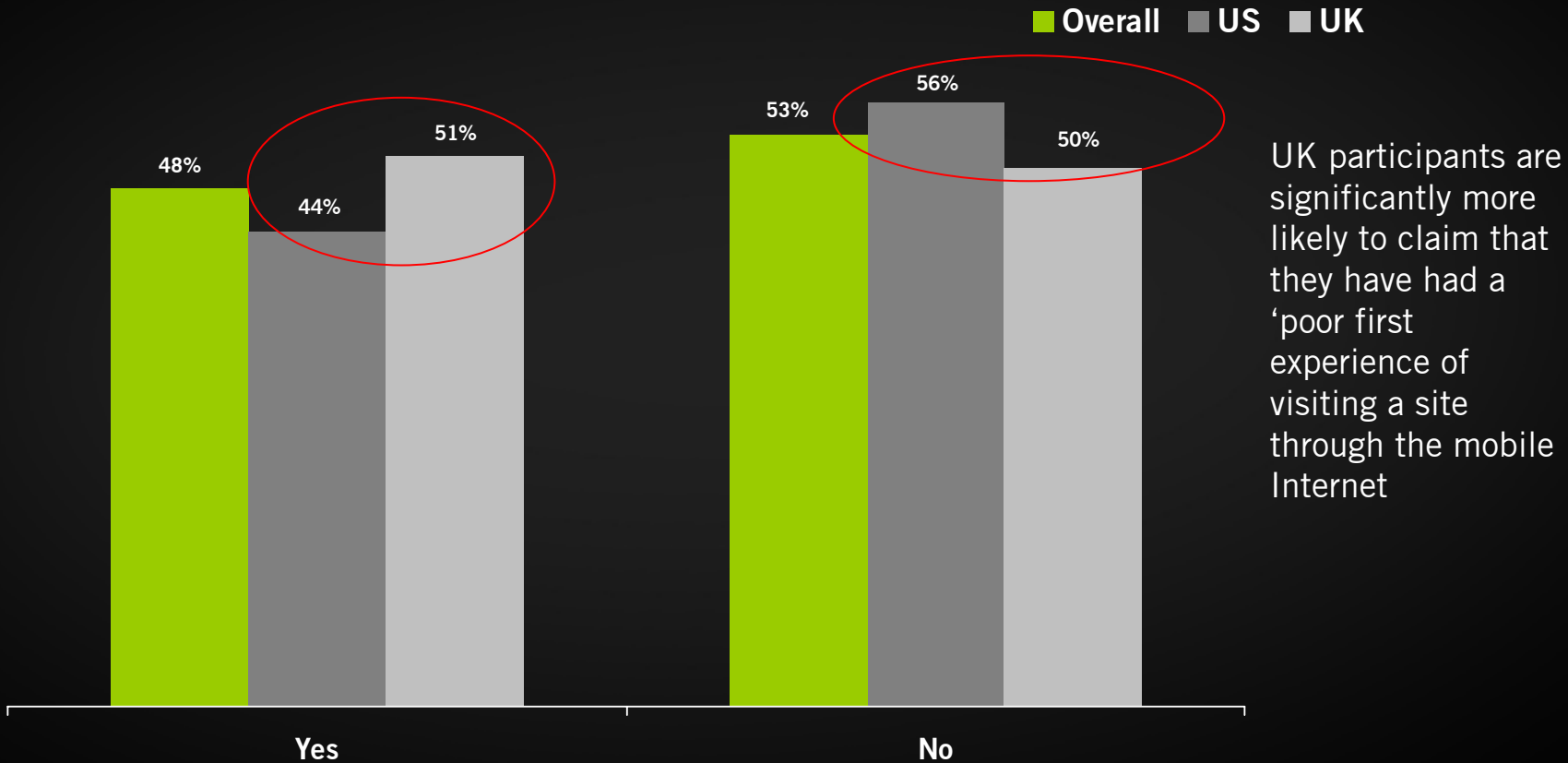


Q16. Thinking about when you access the Internet using your mobile phone, typically, what do you use the Internet on your mobile phone for? (Multiple response option)

Base 1,650, US n = 808 UK n = 842

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Poor first experience of mobile Internet



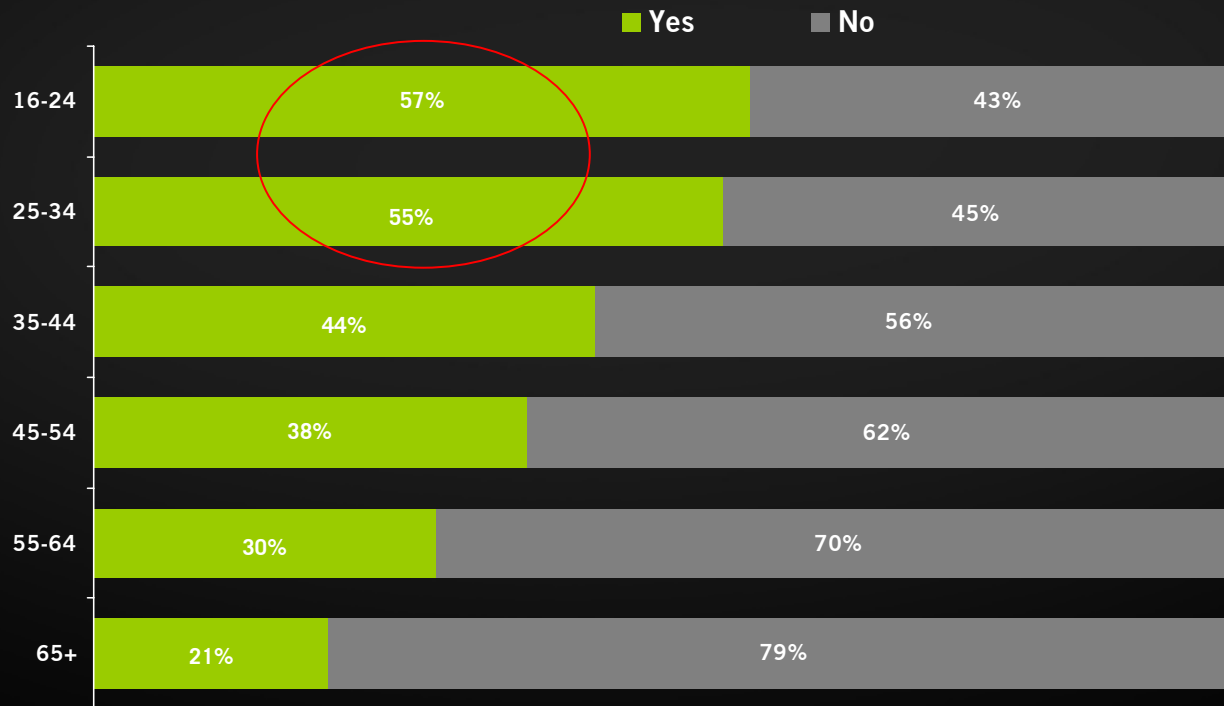
 = Significant at 95%

Q17. Have you ever had a poor first experience of visiting a site through the Internet on your mobile phone?
Base 1,650, US n =808 UK n = 842
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Poor first mobile Internet experience by age

Younger participants are more likely to have 'had a poor first experience of visiting a site through the Internet on a mobile phone; 57% of all 16-24yr olds and 55% of all 25-34yr olds claim to have had a poor first experience.

Conversely, older participants, are less likely to have had a poor first experience; only 30% of all 55-64yr olds claim to have had a poor first experience.



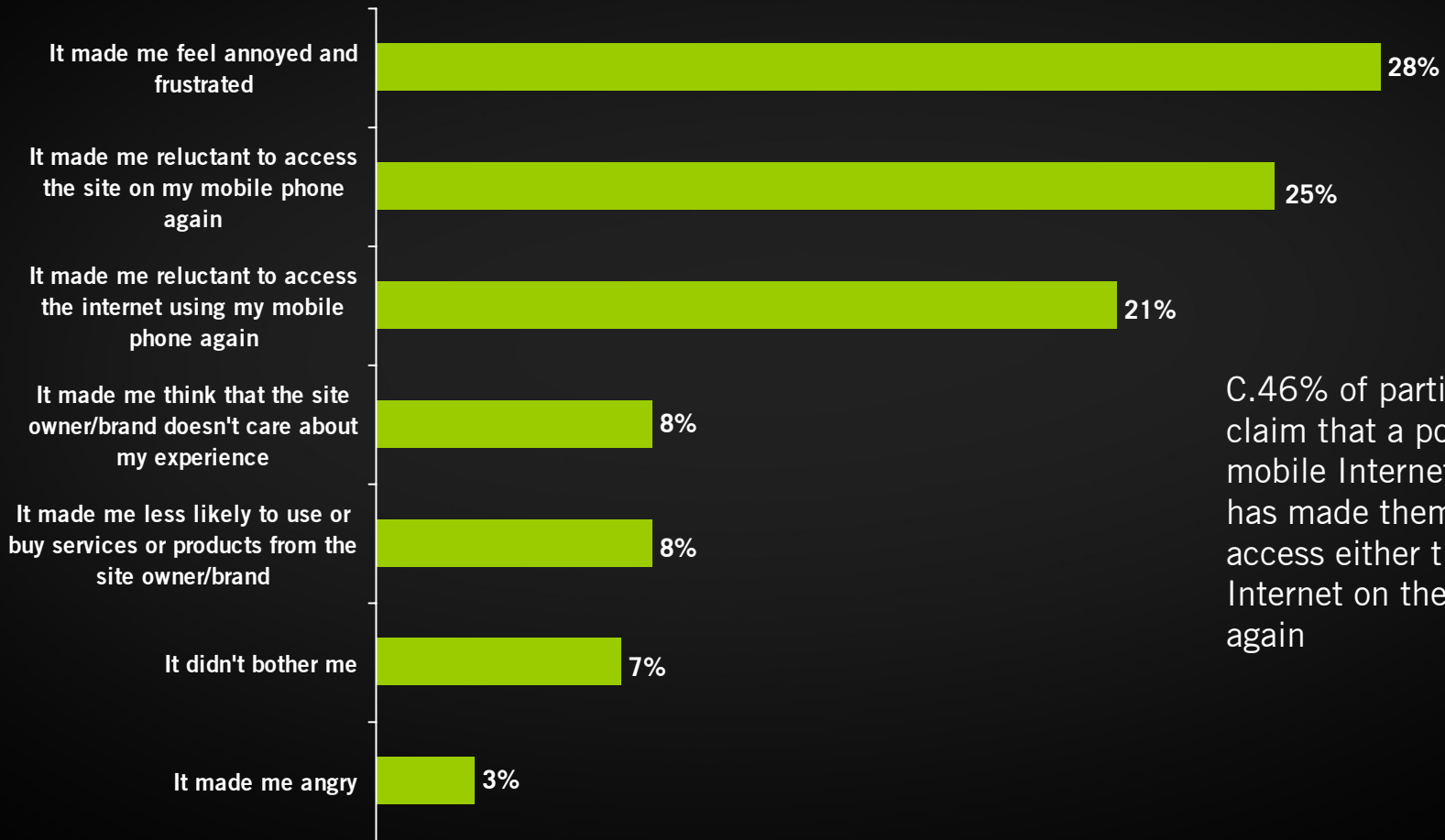
Q17. Have you ever had a poor first experience of visiting a site through the Internet on your mobile phone?

By Q1. Please indicate which age band you fall under.

Base 1,650

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Impact of poor first mobile Internet experience



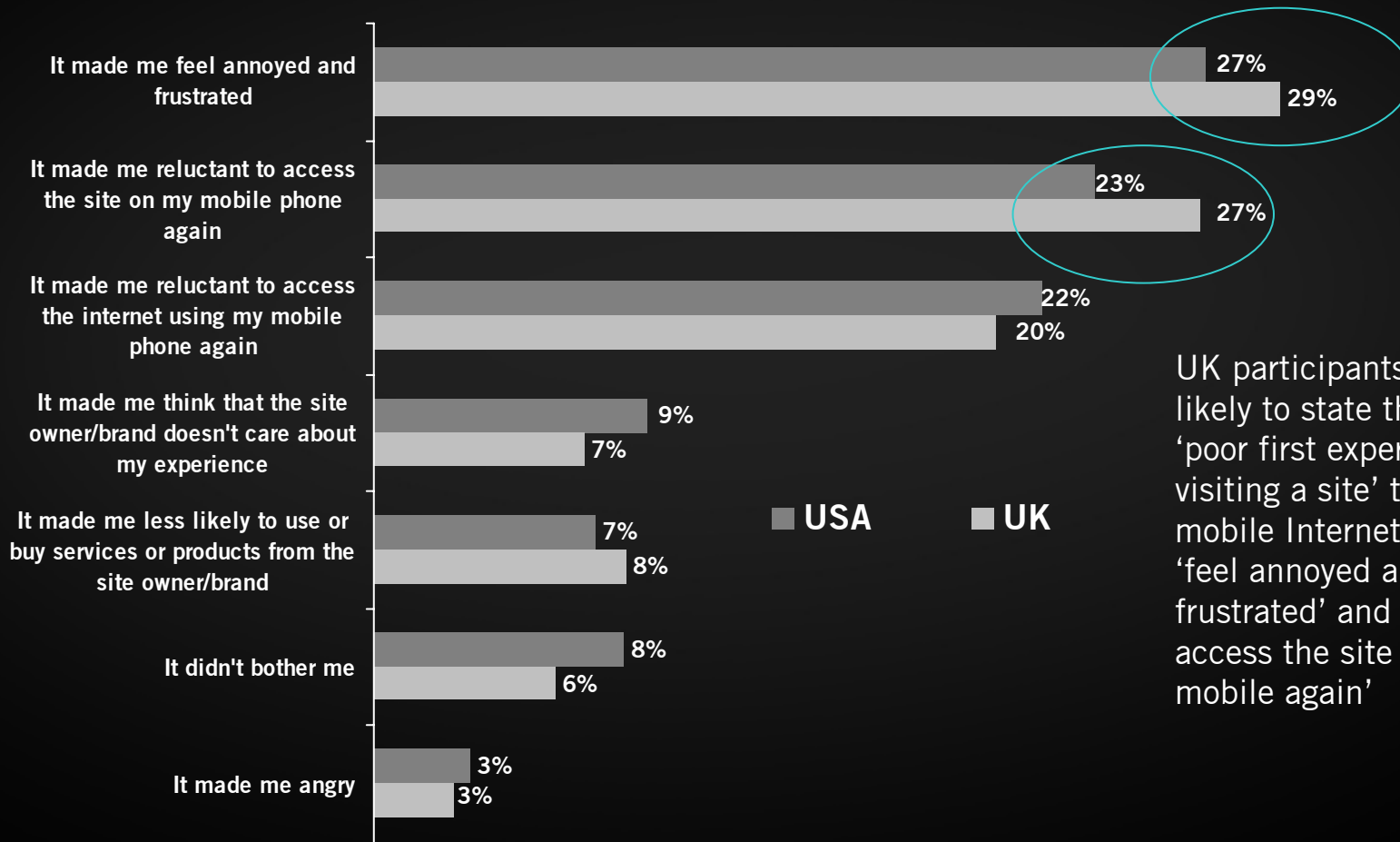
C.46% of participants claim that a poor first mobile Internet experience has made them reluctant to access either the site or the Internet on their mobile again

Q18. Which of the following statements best describes how your poor first experience of visiting a site through the Internet on your mobile phone made you feel?

Base 1,650

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Impact of poor first mobile Internet experience



UK participants are more likely to state that their 'poor first experience of visiting a site' through the mobile Internet made them 'feel annoyed and frustrated' and 'reluctant to access the site on my mobile again'

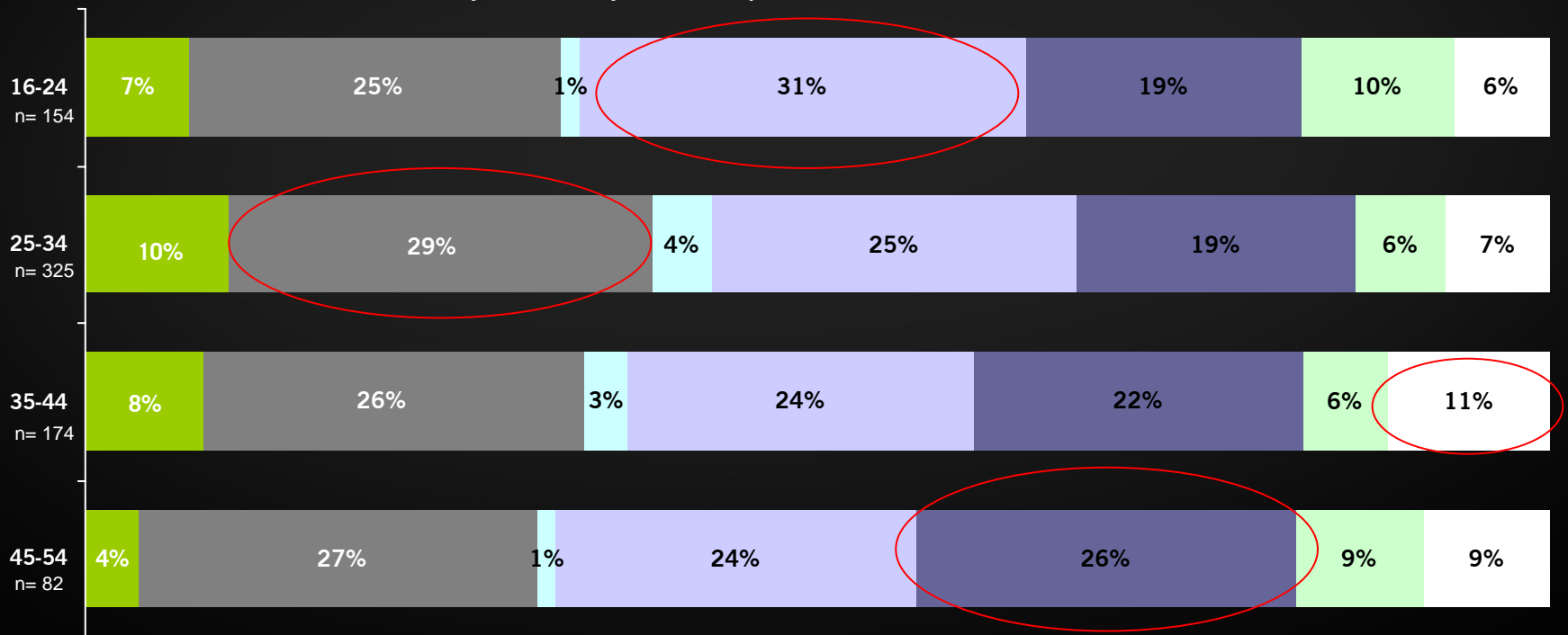
Q18. Which of the following statements best describes how your poor first experience of visiting a site through the Internet on your mobile phone made you feel?

Base 1,650, US n =808 UK n = 842

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

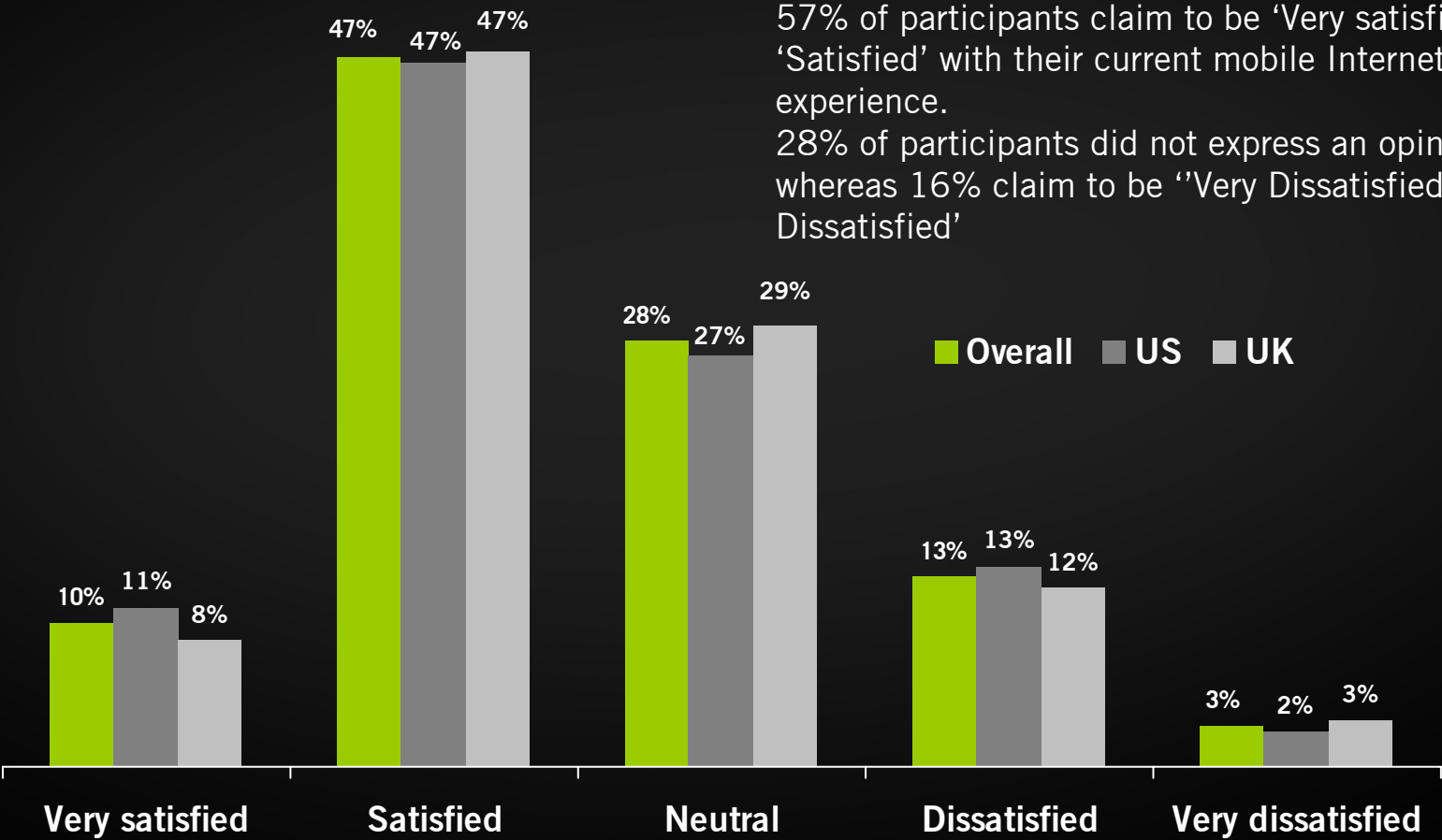
Impact of poor first mobile Internet experience by age

- It made me think that the site owner/brand doesn't care about my experience
- It made me feel annoyed and frustrated
- It made me angry
- It made me reluctant to access the site on my mobile phone again
- It made me reluctant to access the internet using my mobile phone again
- It didn't bother me
- It made me less likely to use or buy services or products from the site owner/brand



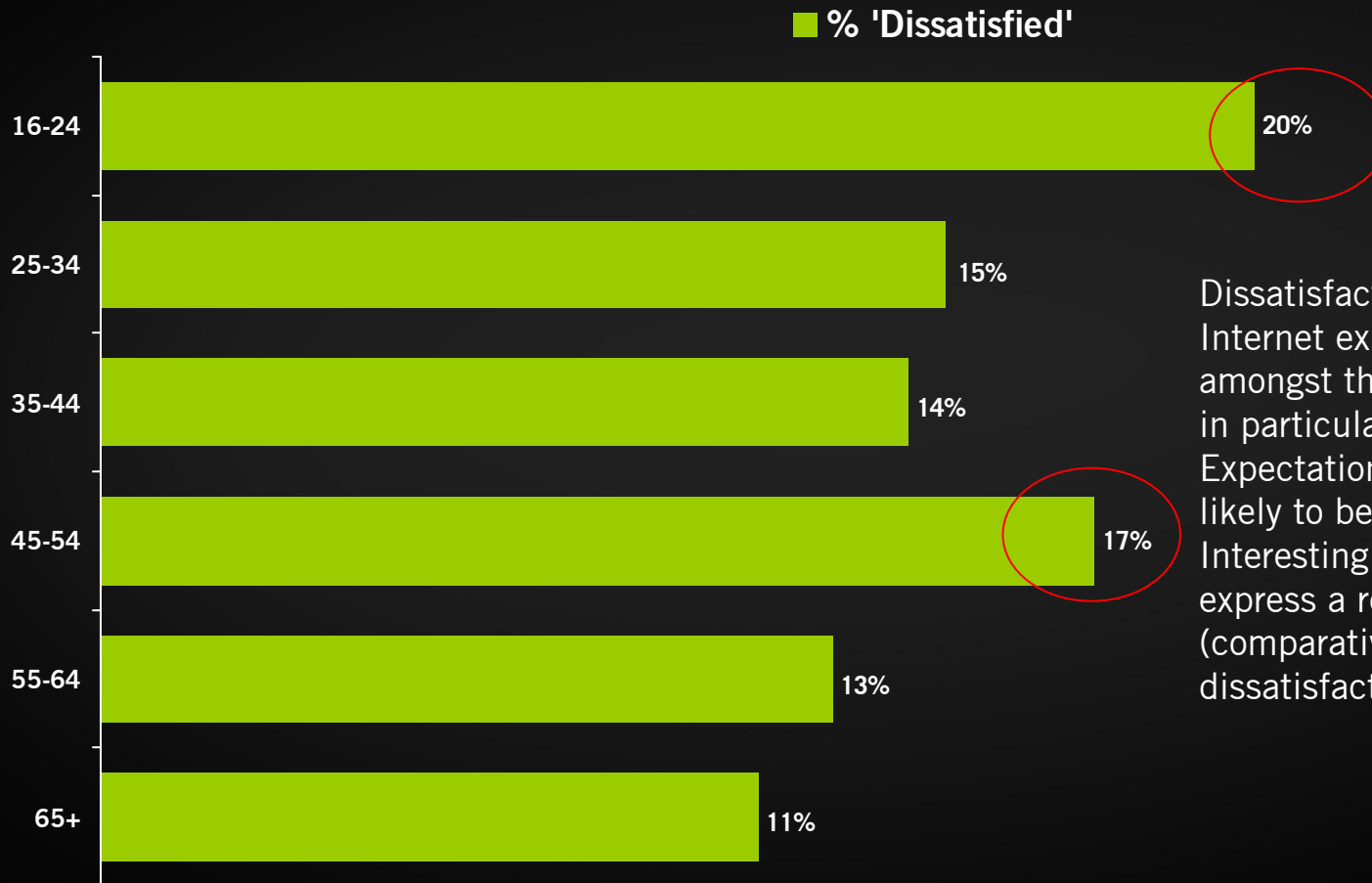
Q18. Which of the following statements best describes how your poor first experience of visiting a site through the Internet on your mobile phone made you feel? By Q1. Could you please indicate which age band you fall under. Excludes age bands where base is too low to analyse (e.g. 55yrs +)
Base 784

Overall satisfaction with the mobile Internet



Q19. Overall, how satisfied are you with your current mobile internet experience?
 Base: 2,014, US n = 1,006 UK n = 1,008
 Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Overall satisfaction with the mobile Internet by age



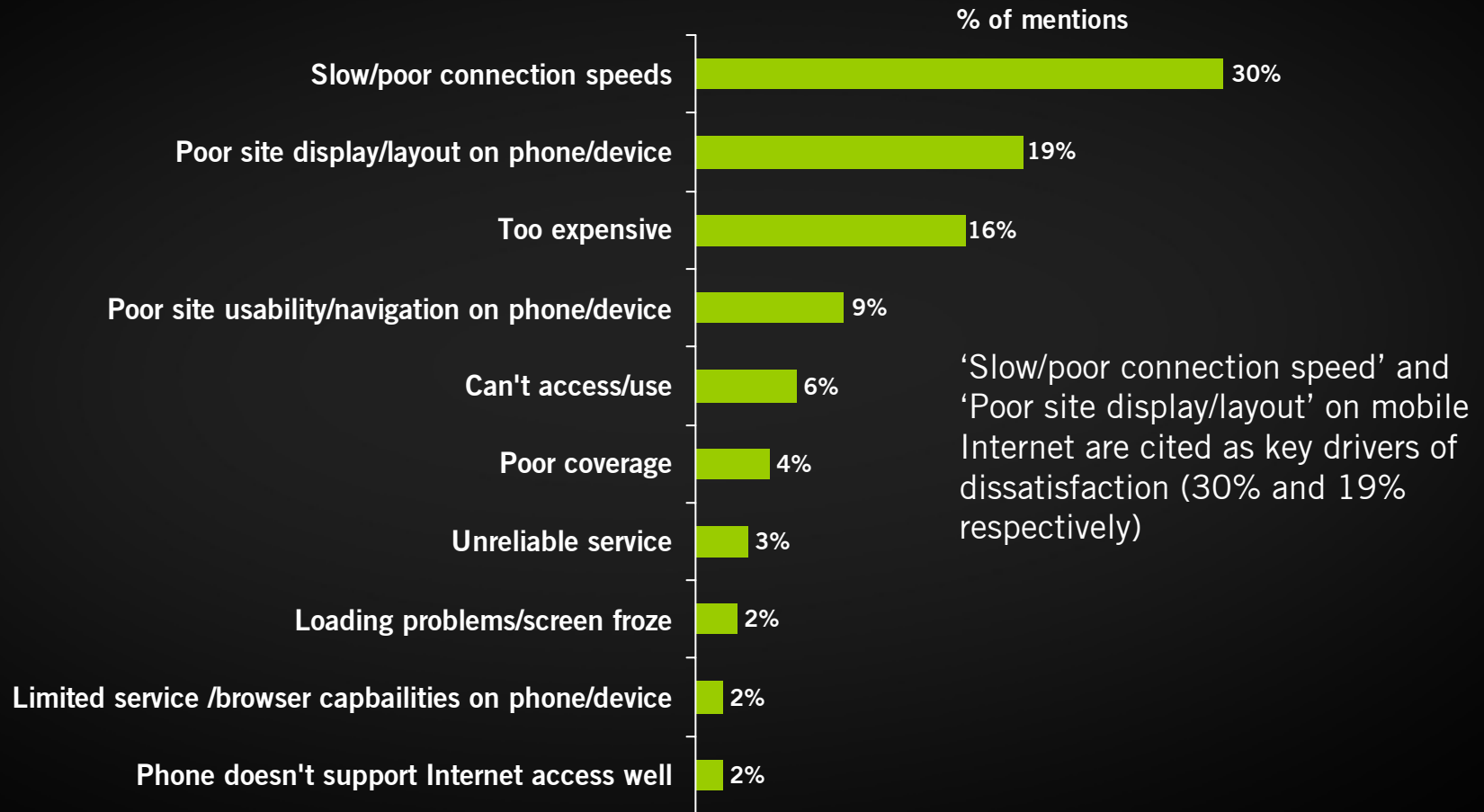
Dissatisfaction with mobile Internet experience is highest amongst the younger age groups, in particular, 16-24yr olds. Expectations from this group are likely to be high. Interestingly 45-54 yr olds also express a relatively high (comparatively) level of dissatisfaction.

Q19. Overall, how satisfied are you with your current mobile internet experience? By Q1. Could you please indicate which age band you fall under.

Base: 2,014

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Dissatisfaction with mobile Internet experience*



Q20. You told us that you were 'Very dissatisfied' or 'Dissatisfied' with your current mobile Internet experience, could you please tell us why that is?

Base: 282

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

*Excludes other; Misc.

Slow/poor connection speed

'It is sometimes unbearably slow!'

'Too slow, and very out-of-date'

'It is very slow - reminding me of my early internet years - so I usually give up'

'It takes too long and often the screens are too big to view on my phone without having to scroll up and down and worse, sideways.'

'It's very expensive to use, and the pages take so long to load that its not something i can afford to use often.'

'it's just too slow & complex to do on a phone'

'It takes too long to load, for which I get charged per minute'

'it's just too slow & complex to do on a phone'

'it took about 1 minute to connect to the web site i was looking for and 30 seconds per web page to download before i could read it, then i get charged for every minute im on, its not worth the added fees i get charged'

Q20. You told us that you were 'Very dissatisfied' or 'Dissatisfied' with your current mobile Internet experience, could you please tell us why that is?

Base: 282

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Poor site design/layout on mobile phone

'CAN NEVER SEEM TO GET THE WEBSITES I WANT - HARD TO NAVIGATE THE PHONE FOR INTERNET ACCESS I.E USING THE NUMBER KEYS...HAVE TO HAVE THE EXACT WEB ADDRESS, OR THE PHONE CAN'T COPE WITH IT'

'The webpages, even with a larger display are cramped & you do not have the option of removing extraneous parts of the display that are not needed'

'More pages should automatically adapt to being viewed on a mobile telephone.'

'Don't have a smart phone, so there were no real page layouts and many pages cannot be seen.'

'cant navigate a web page well on such a small screen'

'I find it very difficult to use probably due to the need to re-format the site for the phone's capability.'

'Not enough sites have them designed for mobile browsing yet so you are limited as to where you can get information. I also think that the screen sizes on mobiles are too small '

'Can't see the web sites on my mobile phone. Totally useless.'

'It is not so much the phone's access to the internet, I like that. But it is the websites that do not have mobile versions. I tried checking my friend's flight on an airport web page the other day and I could not read or access the web page that well.'

Q20. You told us that you were 'Very dissatisfied' or 'Dissatisfied' with your current mobile Internet experience, could you please tell us why that is?

Base: 282

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Too expensive

'£10 credit lasted about 5 minutes'

'Costs too much and is very slow. everything I want to and not easy to use.'

'It is too expensive, and if i do use it it takes too long to get to sites i want to get too. Its easier just to turn my laytop on and use the internet that way instead.'

'If I could access the interenet anywhere it would be worth all the money I pay. But as I can't even access online services at my own home I find it an expense that has yet to pay off.'

'too expensive too hard to access and difficult'

'i don't understand the charges and the screen is to small to see what you are accessing and it takes to long'

'because it is very difficult to get onto any site you might want to visit and all the time it is costing you money'

'I do not us my mobile phone for internet access because of the cost. If it were free or extremely cheap I would use it mainly for directions, banking and sending photos to family and friends.'

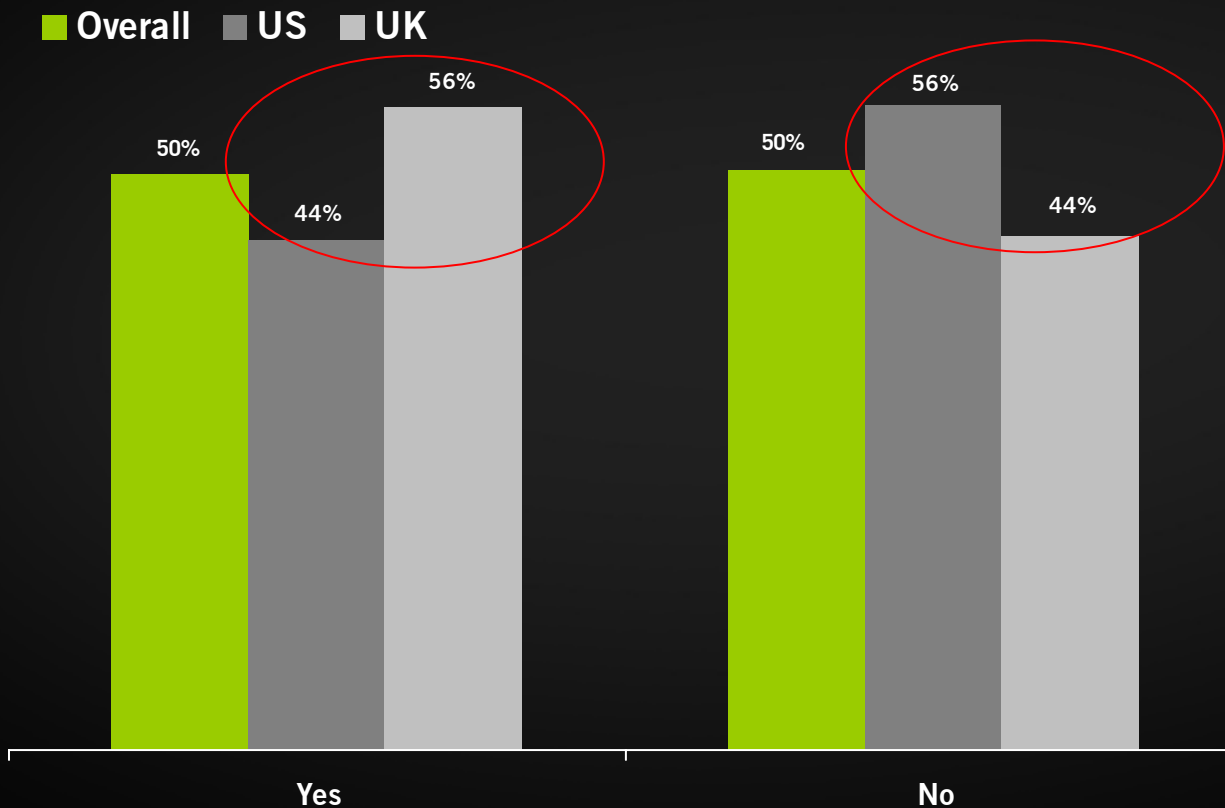
Q20. You told us that you were 'Very dissatisfied' or 'Dissatisfied' with your current mobile Internet experience, could you please tell us why that is?

Base: 282

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Interest in future mobile Internet functionality and claimed propensity to use

Awareness of sites designed for mobile access



50% of participants are aware that some sites are designed 'especially to view on a mobile phone', conversely 50% are unaware.

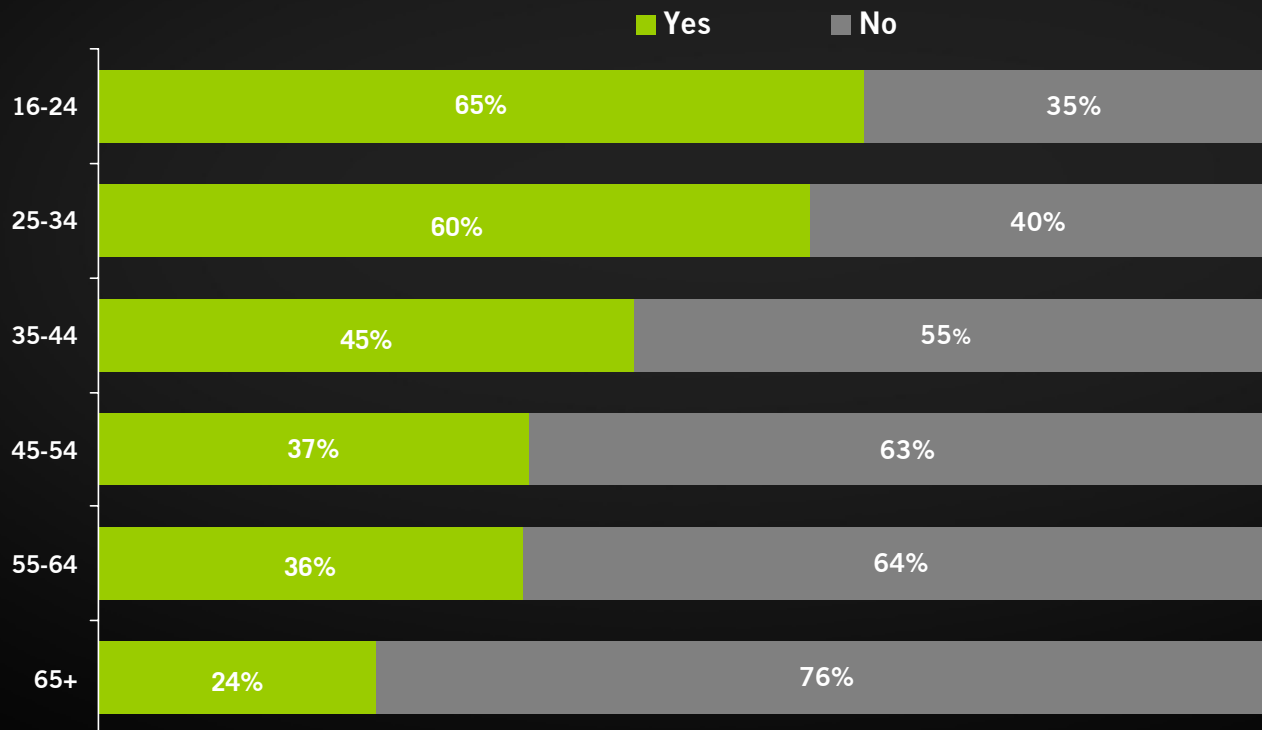
Interestingly, US participants are significantly* less likely to be aware than UK participants

 = Significant at 95%

Q21 Are you aware that some sites are designed especially to view on a mobile phone?
Base: 2,019, US n = 1,010 UK n = 1,009
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Awareness of sites designed for mobile access by age

Awareness of mobile Internet sites (i.e. sites designed especially to view on a mobile phone) decreases significantly with age; whereas nearly two thirds (65%) of 16-24 yr olds are aware of mobile Internet sites, the exact reverse is true for the older age groups; 64% of 55-64 yr olds and over three quarters of 65+ yr olds have no awareness.

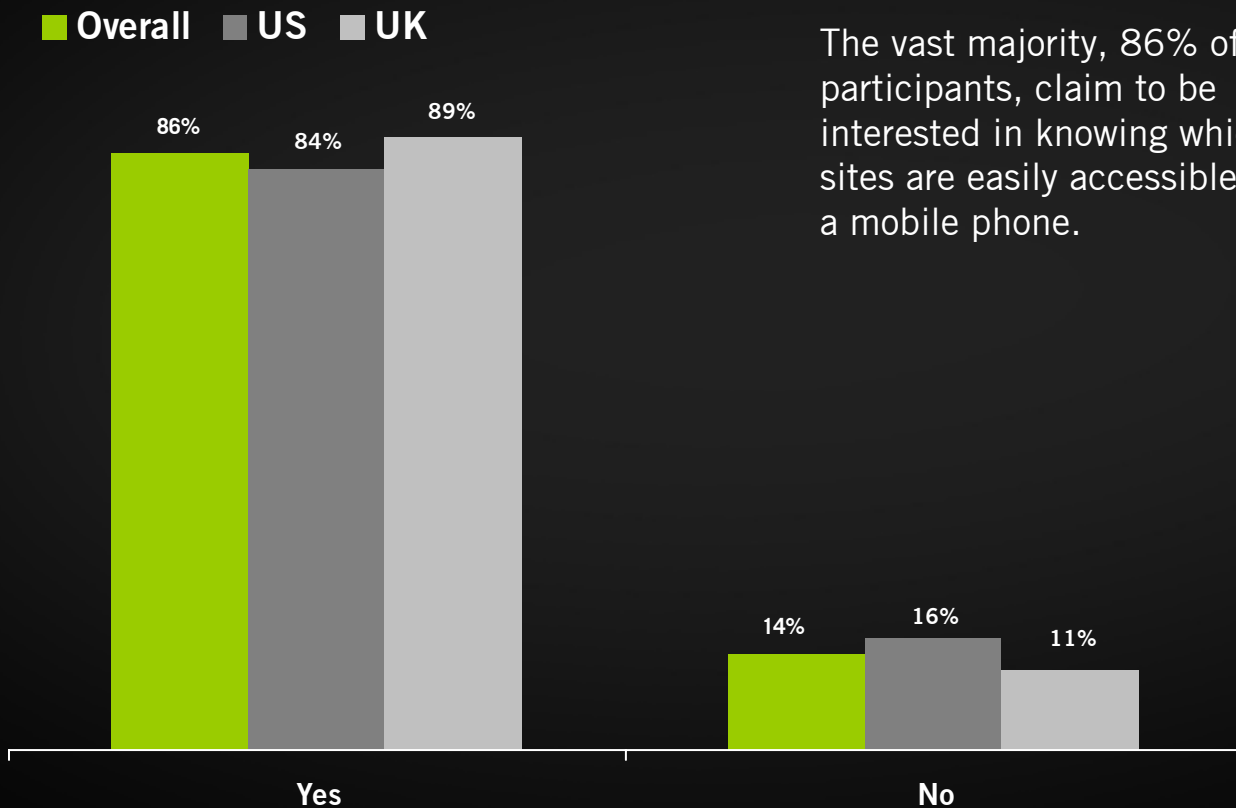


Q21 Are you aware that some sites are designed especially to view on a mobile phone?

Base: 2,019

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

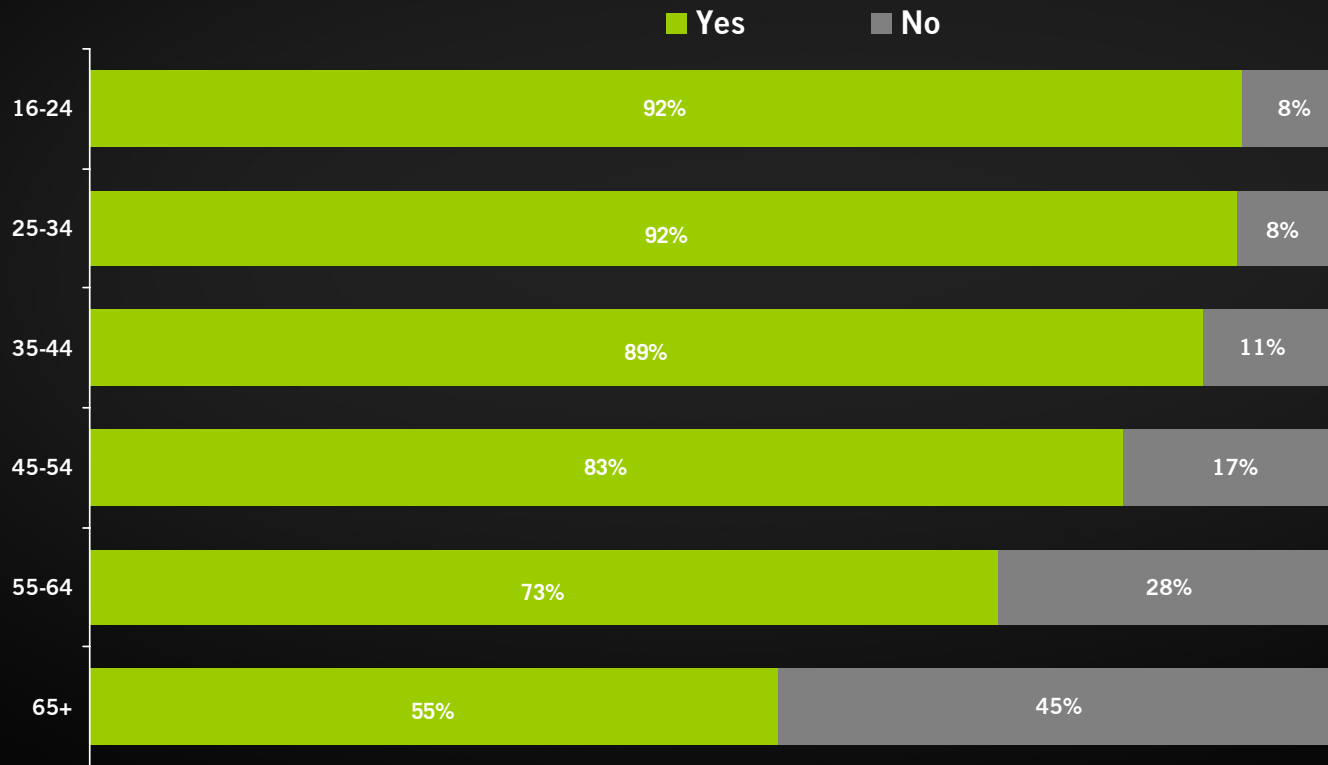
Interest in knowing which sites are easily accessible on mobile phone



Q22. Would it be helpful to know whether certain sites are easily accessible via the Internet on your mobile phone?
Base: 2,019, US n = 1,010 UK n = 1,009
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Interest in knowing which sites are easily accessible on mobile phone by age

Interest in knowing which sites are designed for the mobile Internet is high across all age groups. Although as with awareness of mobile Internet sites, interest decreases with age.



Q22. Would it be helpful to know whether certain sites are easily accessible via the Internet on your mobile phone? By Q1. Please indicate which age band you fall under.

Base: 2,019, US n = 1,010 UK n = 1,009

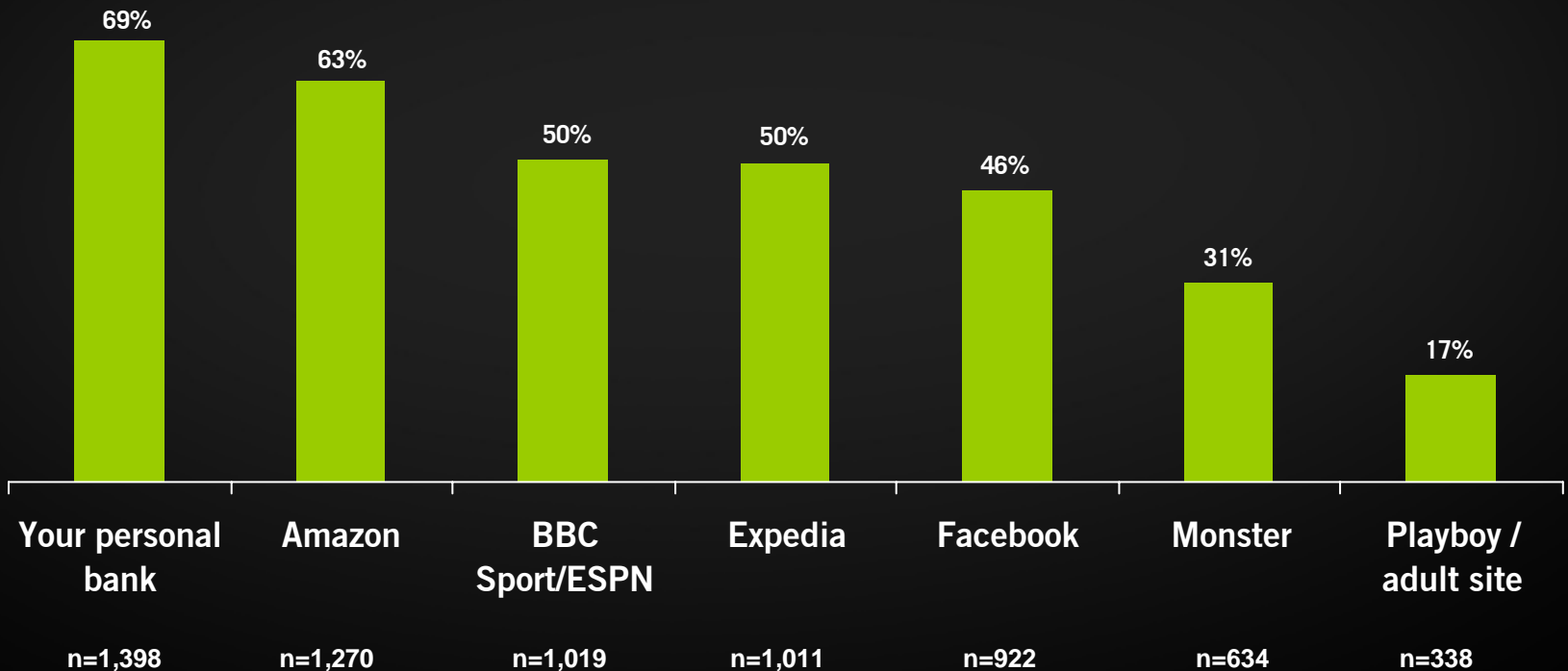
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Interest in visiting brand sites on a mobile phone

Over two thirds of participants stated that they would be interested in visiting their 'personal bank' site via the Internet on their mobile phone (69%).

63% also claimed that they would be interested in visiting Amazon.

Monster and Playboy were least popular



Q23. If the following brands had sites which were easily accessible via the Internet on a mobile phone, which do you think you would visit and when do you think you would be most likely to visit? (Multiple response) N.B. Excluding all those who said they would not visit on a mobile phone

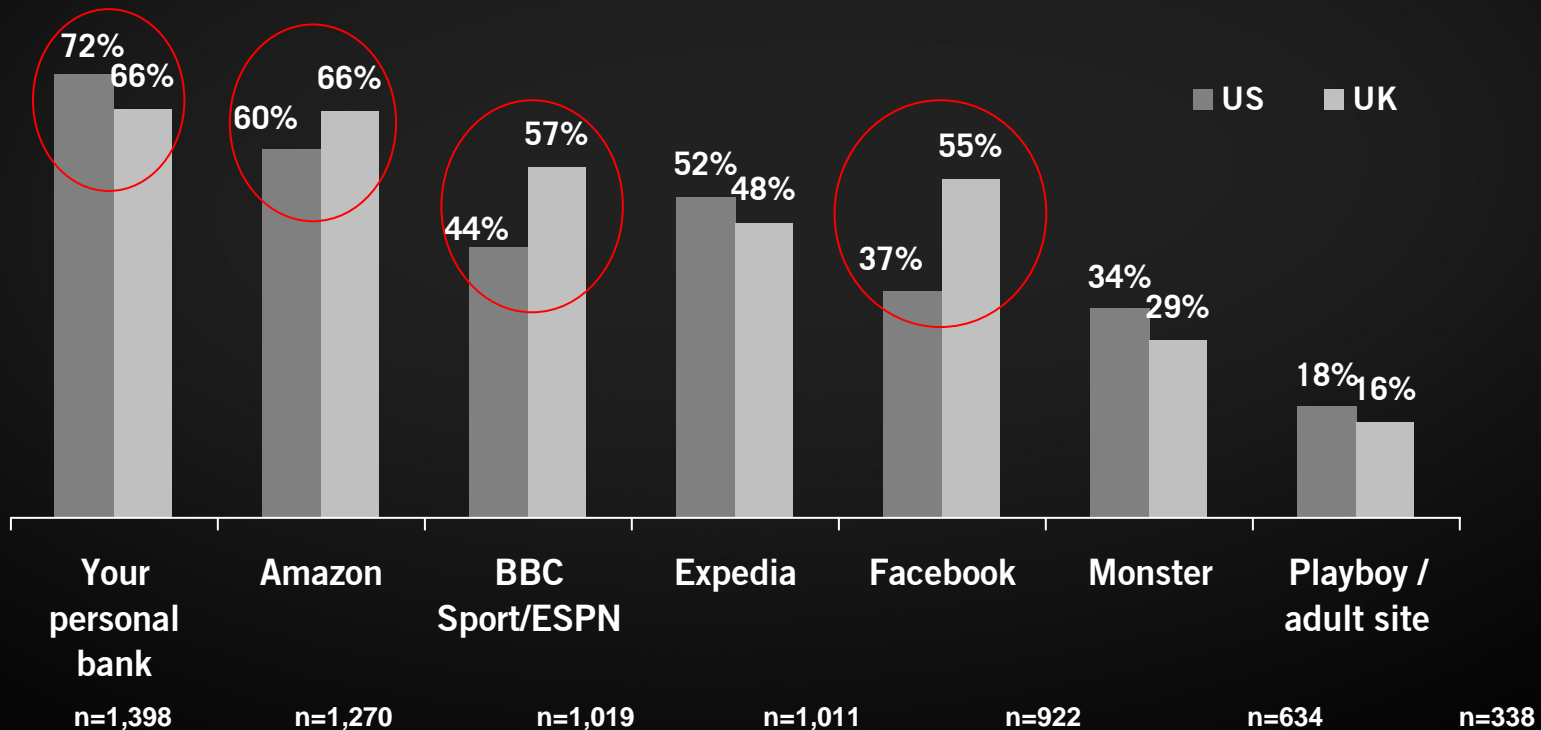
Base: 2,019

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Interest in visiting brand sites on a mobile phone by country

Those in the US are significantly* more likely to claim that they would visit their 'personal bank' site on a mobile phone (76% vs. 66%).

In the UK, however, participants are significantly more likely to claim they would visit 'Amazon', 'BBC sport', and 'facebook' on a mobile phone.



Q23. If the following brands had sites which were easily accessible via the Internet on a mobile phone, which do you think you would visit and when do you think you would be most likely to visit? N.B. Excluding all those who said they would not visit on a mobile phone

Base: 2,019, US, n=1010, UK n= 1009

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

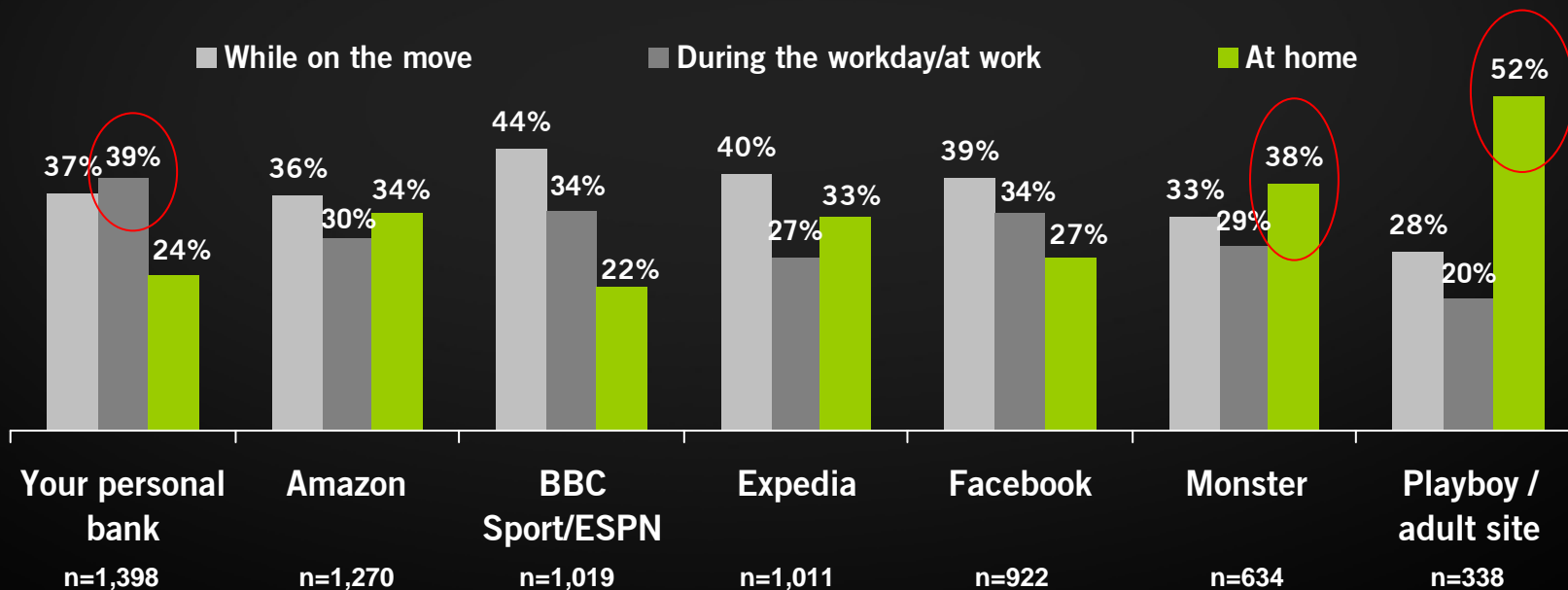
○ = *Significant at 95%

Visiting brand sites on a mobile phone; when and where

Interestingly, participants are more likely visit their 'personal bank' site on a mobile 'During the workday/at work' (39%) than 'While on the move' or 'At home'.

However participants are most likely to visit 'Amazon', 'BBC Sport/ESPN', 'Expedia' and 'facebook', 'While on the move'.

Participants are likely to visit 'Monster' and 'Playboy/adult' sites on a mobile 'At home'.



Q23. If the following brands had sites which were easily accessible via the Internet on a mobile phone, which do you think you would visit and when do you think you would be most likely to visit? N.B. Excluding all those who said they would not visit on a mobile phone
Base: 2,019

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Visiting brand sites 'on the move' by country

Those in the UK are more likely to visit virtually all brand sites while 'on the move' than their US counterparts.



 = Significant at 95%

Q23. If the following brands had sites which were easily accessible via the Internet on a mobile phone, which do you think you would visit and when do you think you would be most likely to visit? N.B. Excluding all those who said they would not visit on a mobile phone

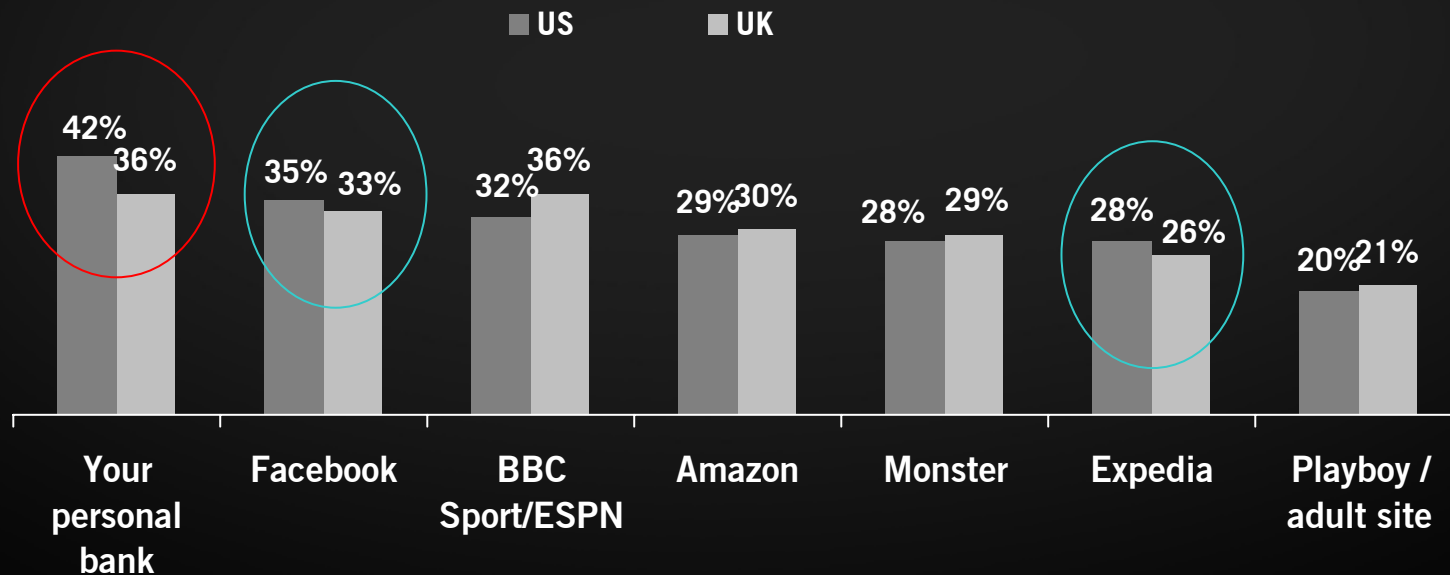
Base: 2,019, US, n=1010, UK n= 1009

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Visiting brand sites 'during the workday' by country

Those in the US are significantly* more likely visit their 'personal bank' 'during the workday/whilst at work' than those in the UK (42% vs. 36%).

They are also marginally more likely to visit 'Facebook' and 'Expedia' 'during the workday/whilst at work'.



 = Significant at 95%

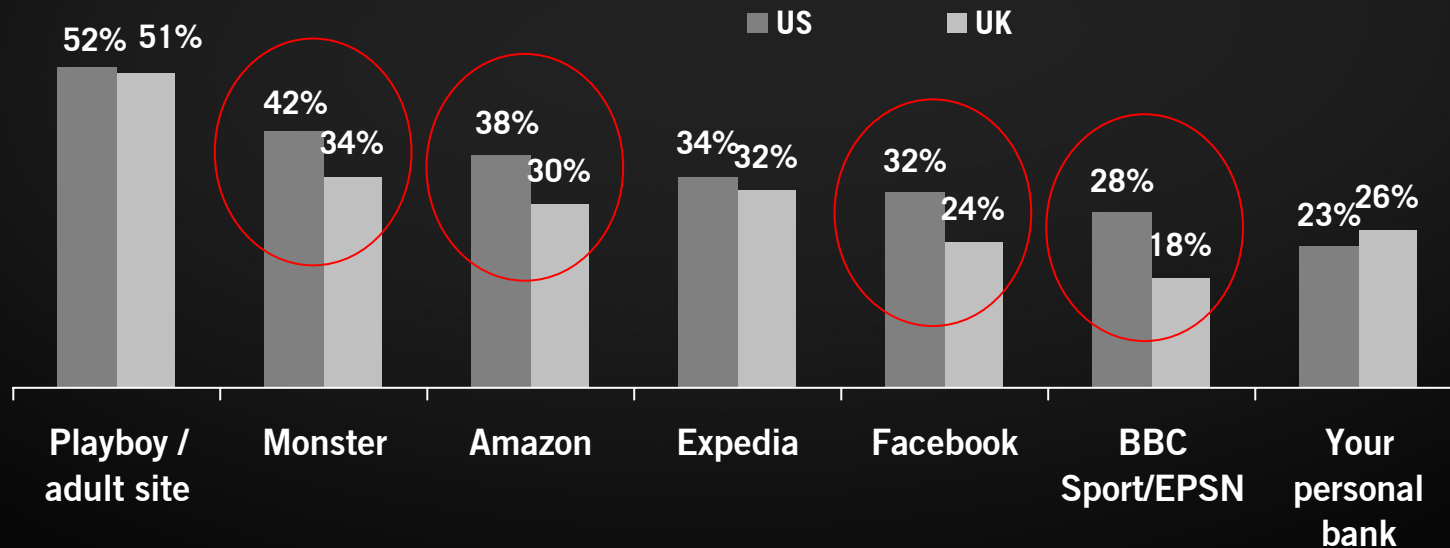
Q23. If the following brands had sites which were easily accessible via the Internet on a mobile phone, which do you think you would visit and when do you think you would be most likely to visit? N.B. Excluding all those who said they would not visit on a mobile phone

Base: 2,019, US, n=1010, UK n= 1009

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Visiting brand sites 'at home' by country

Interestingly, participants in the US are more likely to state that they would visit 'Monster', 'Amazon', 'facebook' and 'BBC Sport/ESPN' on a mobile phone 'at home'.



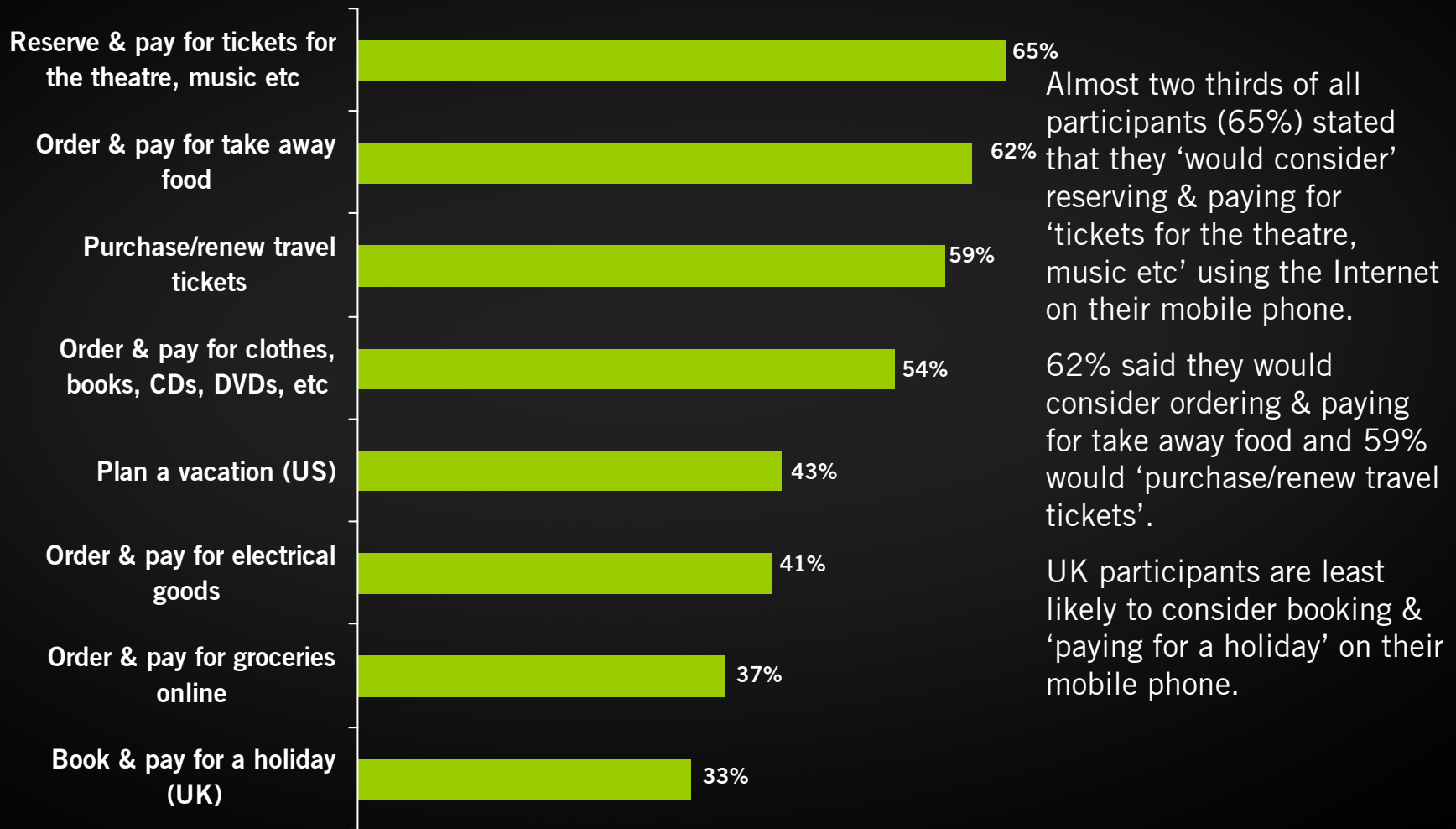
 = Significant at 95%

Q23. If the following brands had sites which were easily accessible via the Internet on a mobile phone, which do you think you would visit and when do you think you would be most likely to visit? N.B. Excluding all those who said they would not visit on a mobile phone

Base: 2,019, US, n=1010, UK n= 1009

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Interest in advanced/additional mobile Internet activities

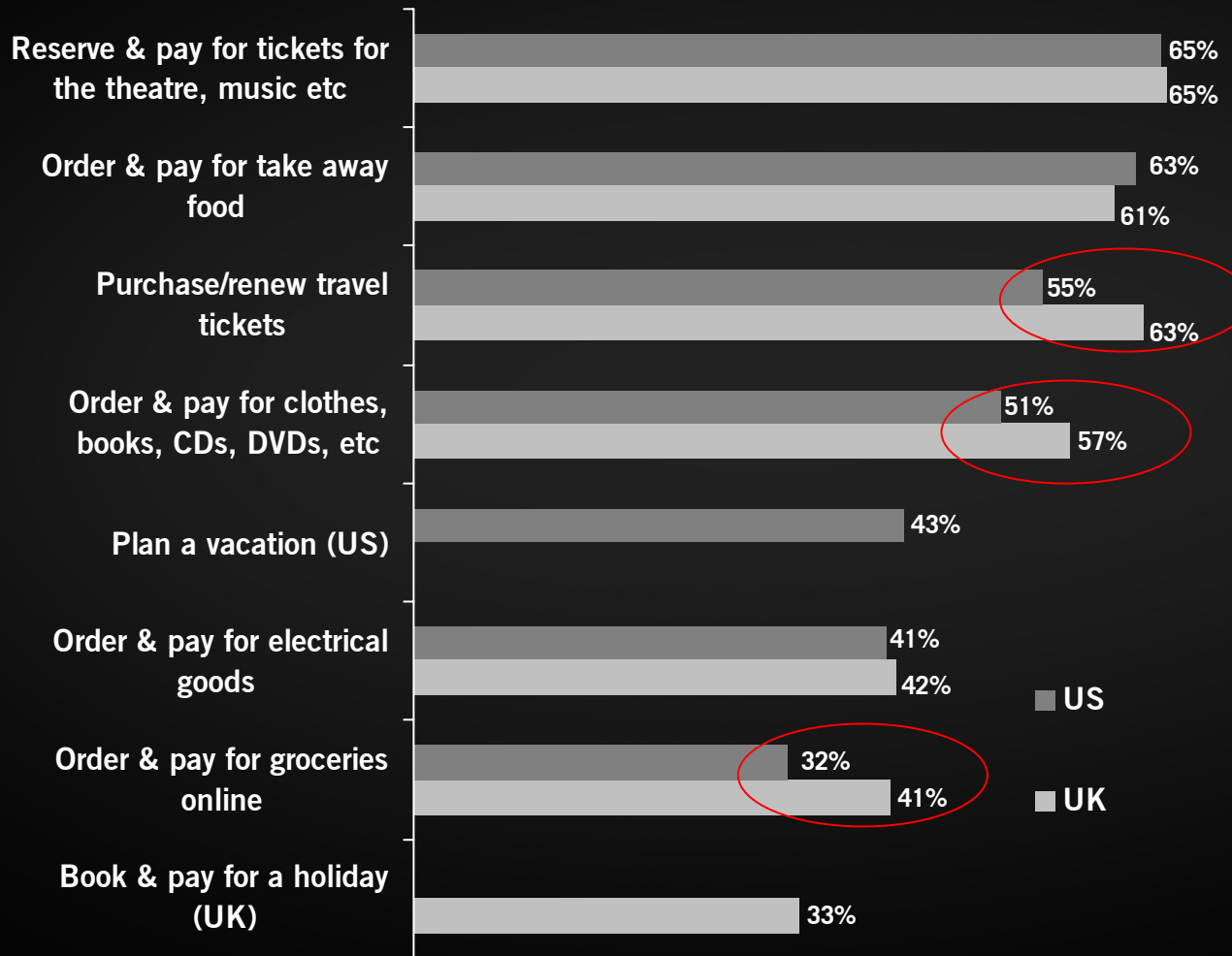


Q24. Which of the following activities would you consider doing over the Internet on your mobile phone? N.B. Includes only those who said they 'Would' consider doing over the Internet on a mobile phone.

Base: 2,019

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

Interest in advanced/additional mobile Internet activities by country



UK participants are significantly more likely to consider purchasing/renewing 'travel tickets' than US participants (63% vs. 55%).

They are also significantly* more likely to consider ordering & paying for 'clothes, books, CDs DVDs etc' and 'groceries' over the Internet on their mobile phone.

= Significant at 95%

Q24. Which of the following activities would you consider doing over the Internet on your mobile phone? N.B. Includes only those who said they 'Would' consider doing over the Internet on a mobile phone.

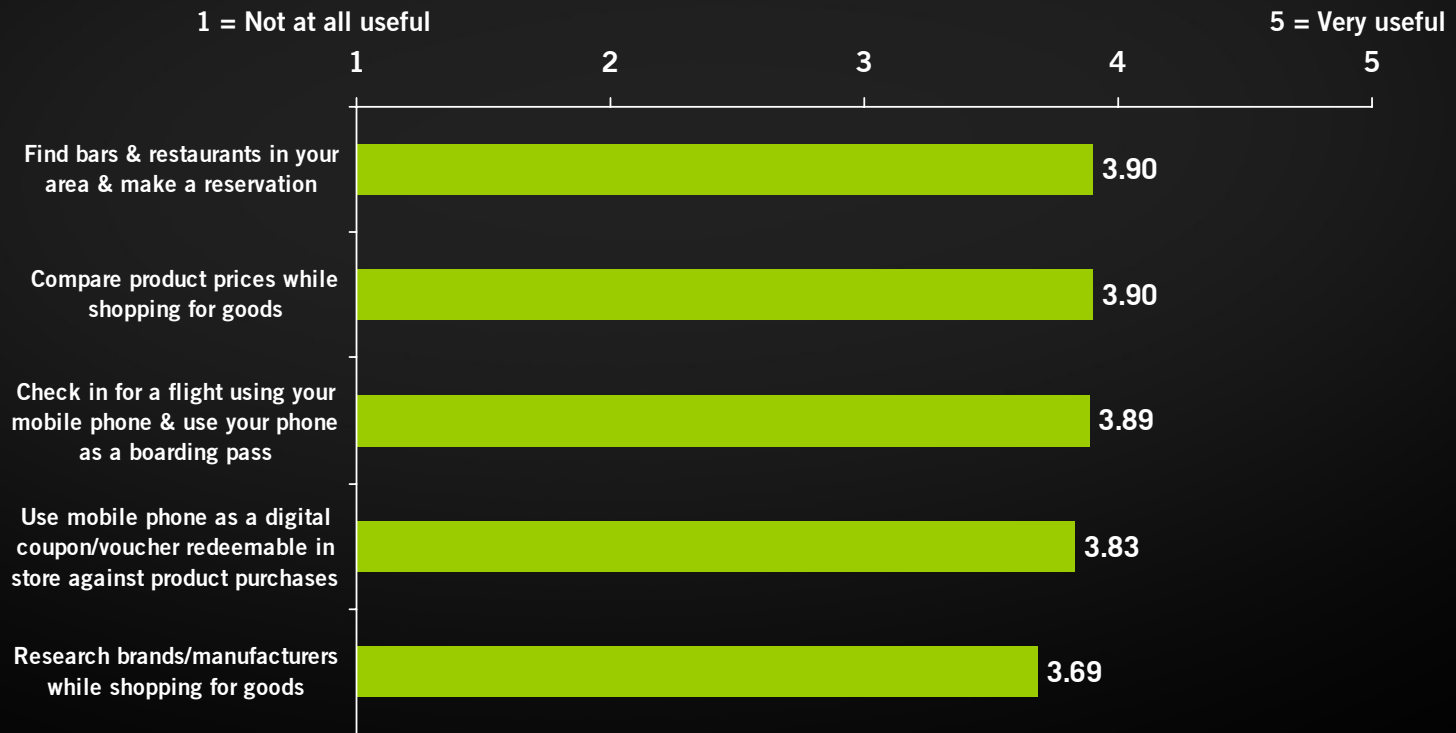
Base: 2,019, US n = 1,010, UK n = 1,009

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Mean 'usefulness' of advanced/additional mobile Internet activities

Participants consider all listed advanced/additional functionality 'Useful' (min mean score 3.69, where 1 = 'Not at all useful' and 5 = 'Very useful').

'Find bars & restaurants in your area & make a reservation' is considered the most useful achieving a mean 'Useful' score of 3.90.

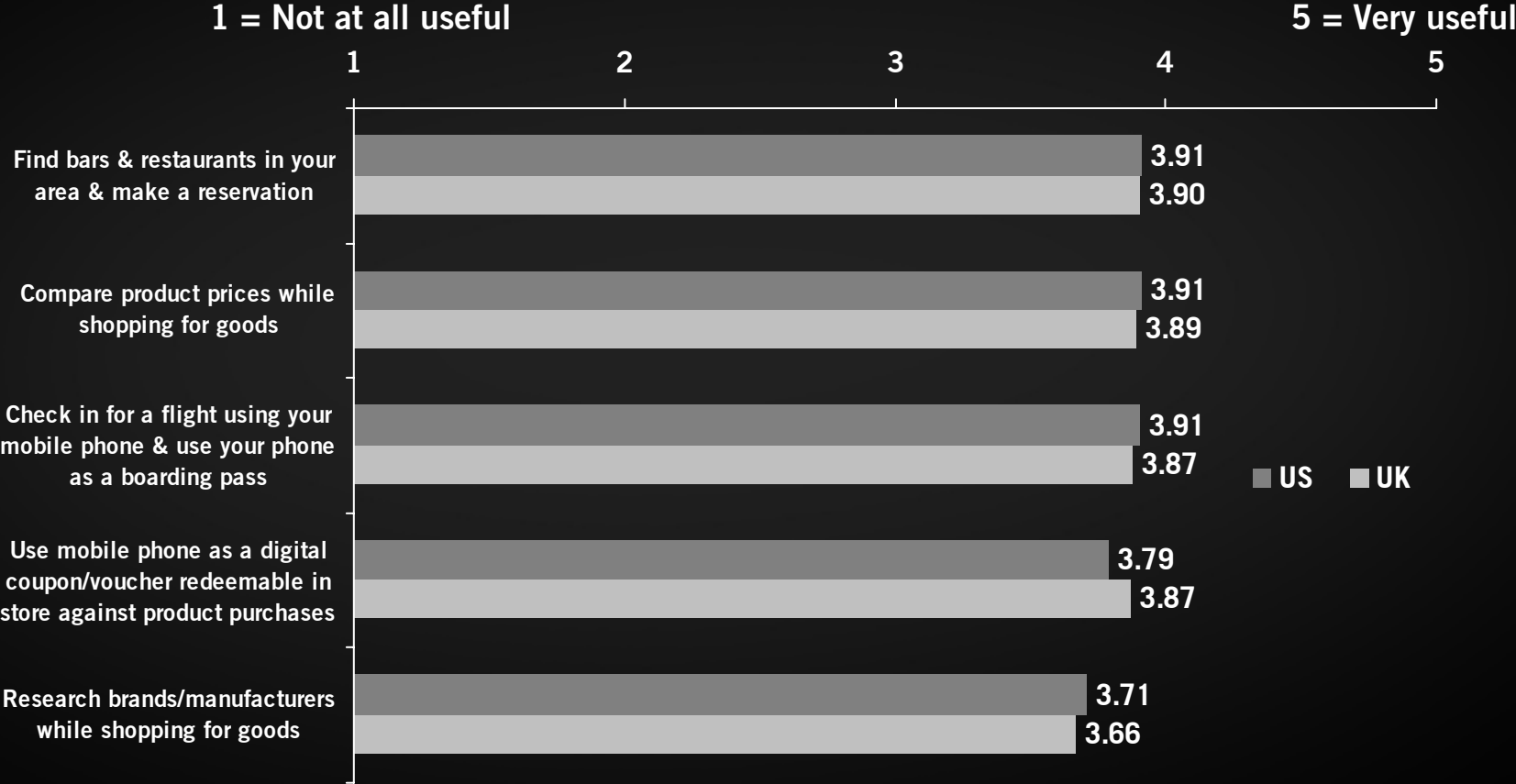


Q25. And how useful do you think it would be to do each of the following over the Internet on your mobile phone?

Base: 2,019

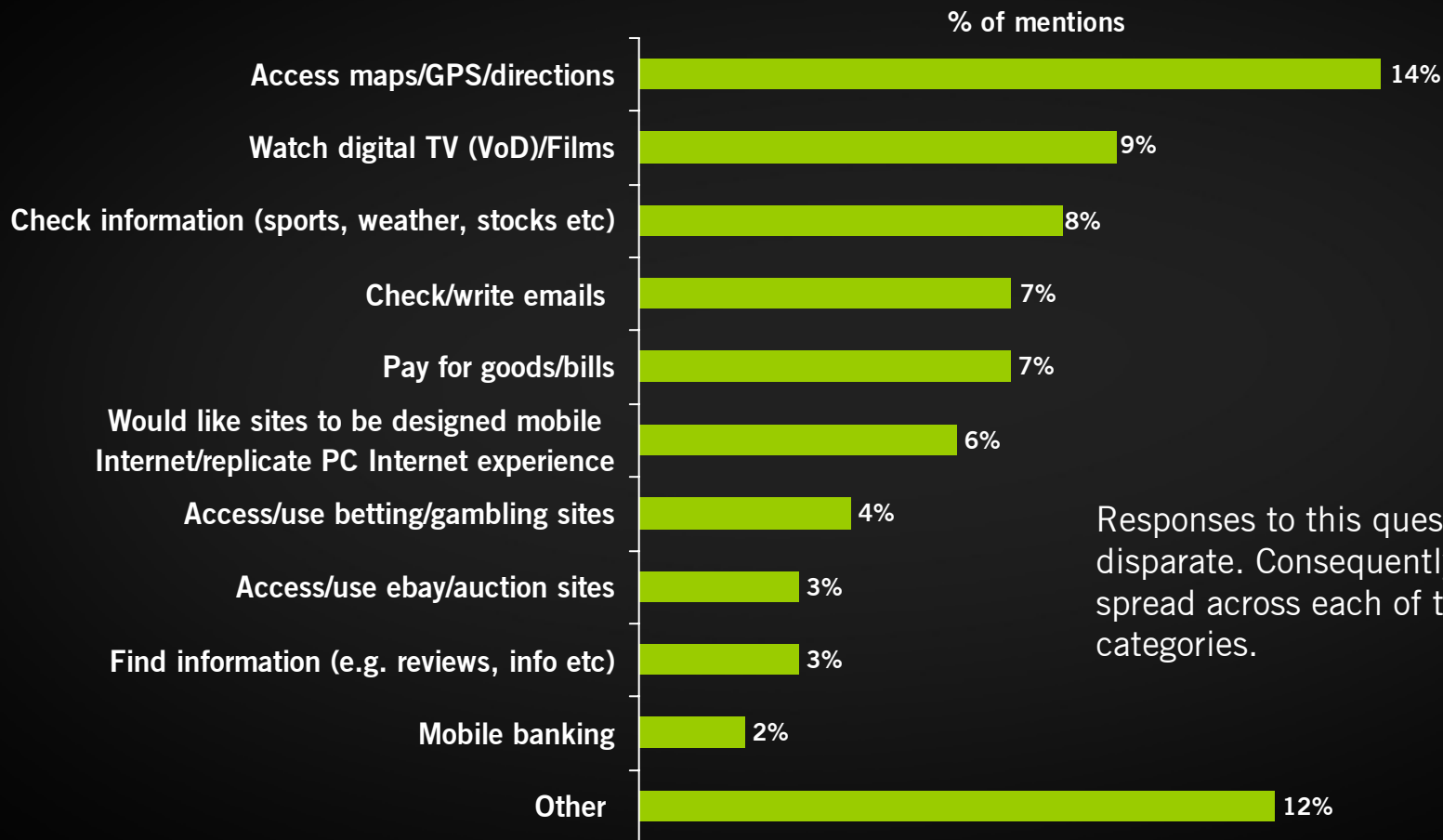
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Mean 'usefulness' of advanced/additional mobile Internet activities by country



Q25. And how useful do you think it would be to do each of the following over the Internet on your mobile phone?
 Base: 2,019, US n = 1,010 UK n = 1,009
 Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Anything else you'd like to do using the mobile Internet? Top 10



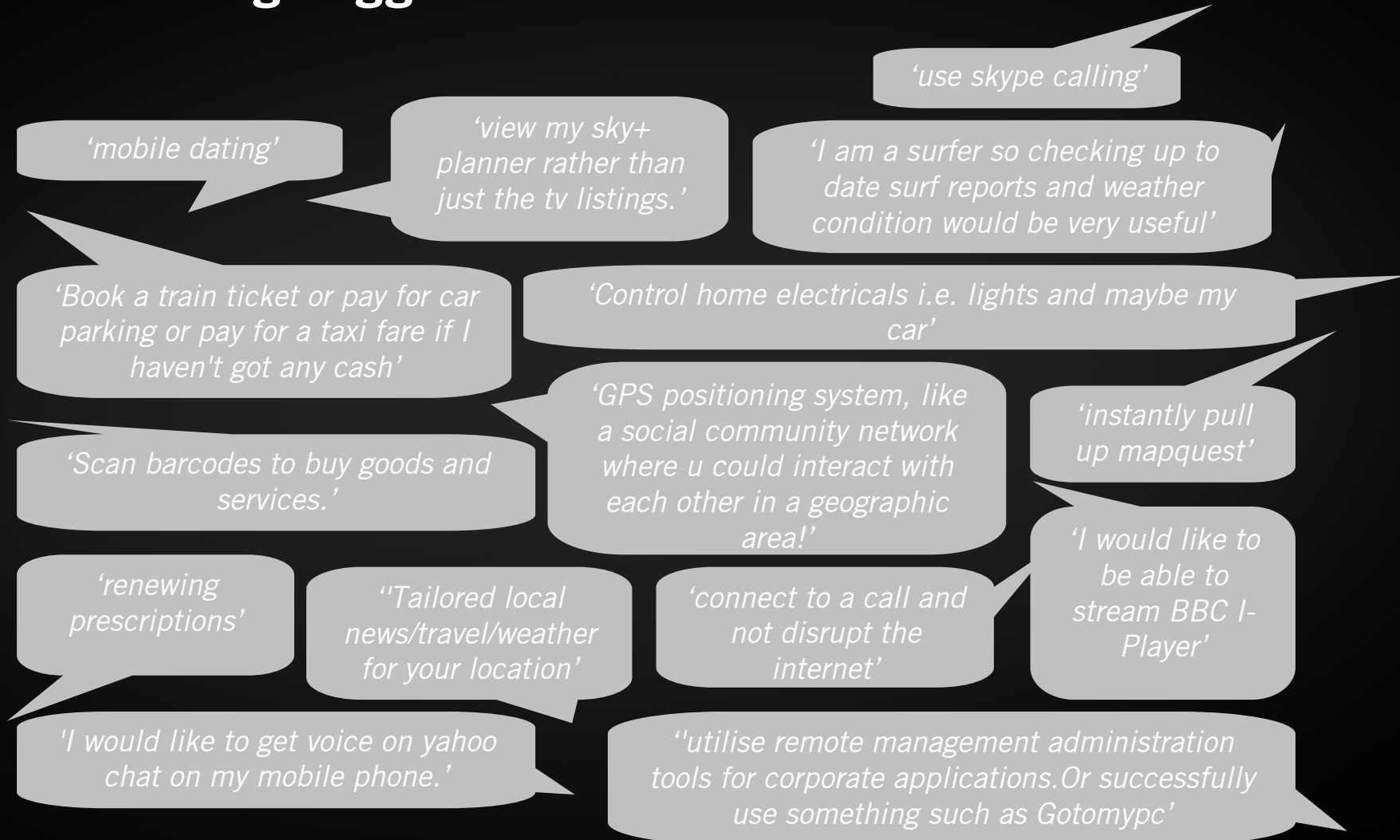
Responses to this question were relatively disparate. Consequently responses are spread across each of the established categories.

Q26. Is there anything else you can think of that you would like to be able to do using the Internet on your mobile phone?

Base: 325

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Interesting suggestions



Q26. Is there anything else you can think of that you would like to be able to do using the Internet on your mobile phone?

Base: 325

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Other requests/comments

'main thing is to be able to do this easily with no confusing instructions'

'I think the screen is so small that any kind of search for information would take too long to be convenient (except when desperate), when a pc at home is easier to use.'

'Make it easier for people just starting out.'

'ANYTHING that we can use our phones for in lieu of paper products... is great!'

'Manual or instruction to make something (while I'm shopping in Home Depot). Like, what do I need to repair my A/C... help in do it yourself forum.'

'I think there should be anti viral and anti spyware software installed in all mobile phones that have access to the internet.'

'have easy access just like on a computer'

'As an ebay addict (sorry-user!) I would prefer to be able to have more facilities available for that site (for example). At the moment I do have to wait til I get home to do certain things there..'

'be able to view website links without getting an error message or something saying I can not view it...I can not even check my bank account on my phone because it tells me that my browser is not compatible for doing it with my phone'

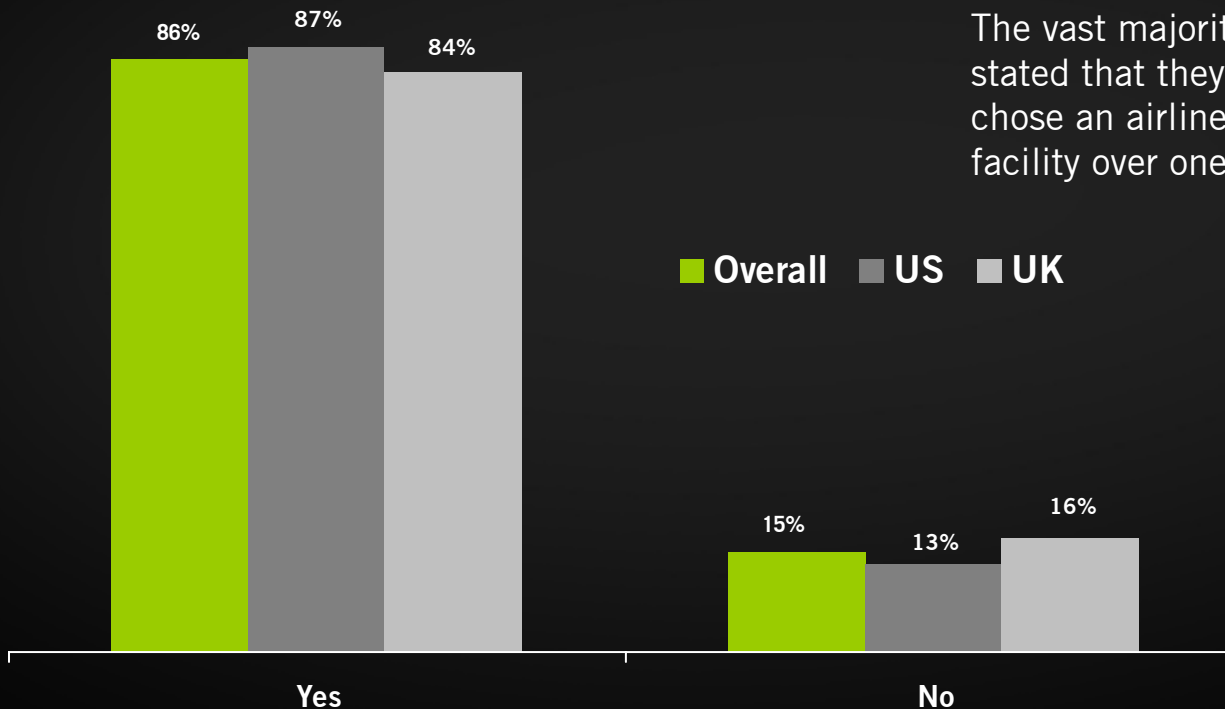
Q26. Is there anything else you can think of that you would like to be able to do using the Internet on your mobile phone?

Base: 325

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Interest in airline with mobile phone boarding pass

If two flights cost the same but one airline allowed you to check-in via a mobile phone and use your phone as a boarding pass (saving you 40minutes in time) would you be more likely to choose the airline with the mobile check-in service?



The vast majority (86%) respondents stated that they would be more likely to chose an airline with the mobile check in facility over one without.

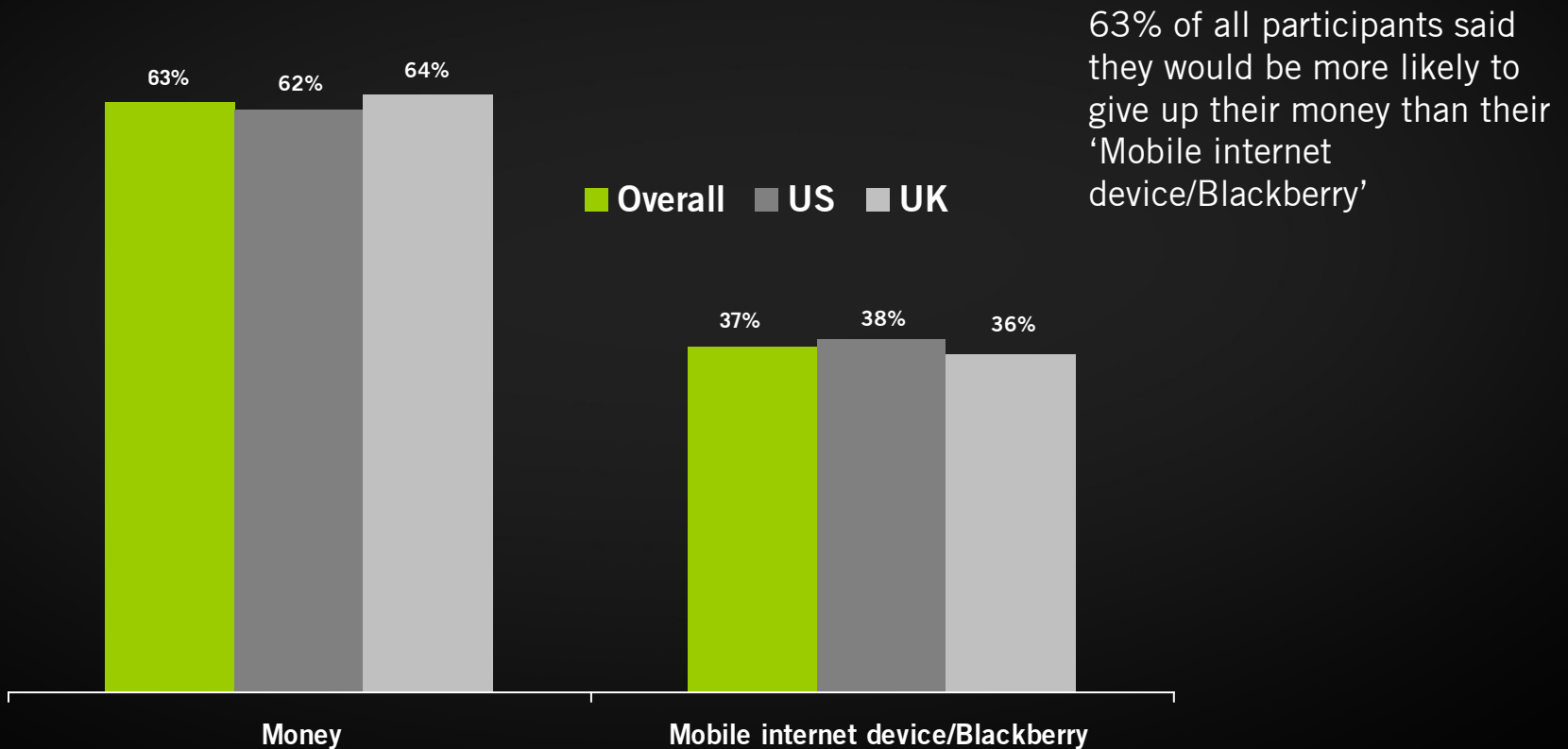
Q27 If two flights cost the same but one airline allowed you to check-in via a mobile phone and use your phone as a boarding pass (saving you 40minutes in time) would you be more likely to choose the airline with the mobile check-in service?

Base: 2,019, US n = 1,010 UK n = 1,009

Source: Mobile Internet Usage and Attitudes Study dotMobi & AKQA May 2008

'What would you be more likely to give up?'

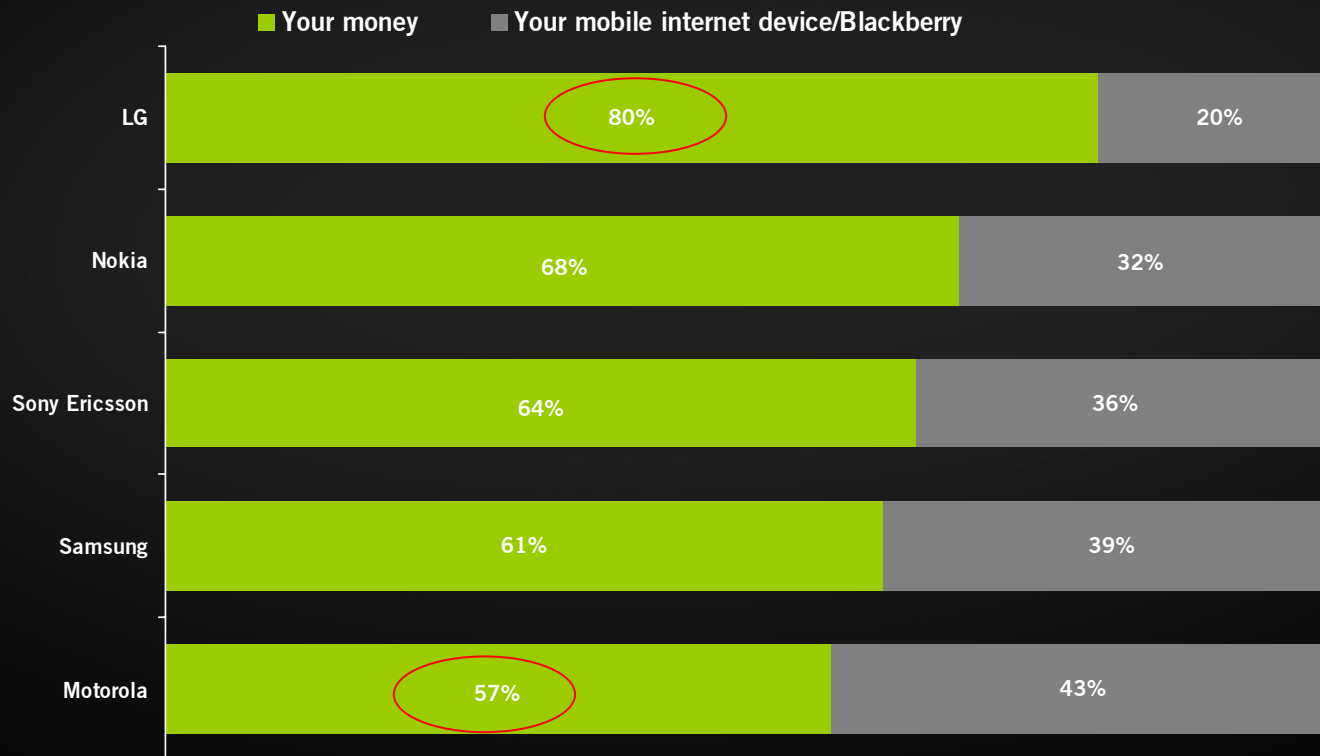
If you were mugged or robbed which would you be more likely to give up?



Q28. If you were mugged or robbed which would you be more likely to give up?
Base: 2,019, US n = 1,010 UK n = 1,009
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

‘What would you be more likely to give up?’ by handset brand purchased in last 6 months

LG owners (those who purchased a LG handset in the last 6 months) were most likely to state that they would be ‘more likely’ to give up their money than their mobile device (80%). Conversely, Motorola owners were most likely to state that they would give up their mobile device (57%).



Q28. If you were mugged or robbed which would you be more likely to give up? By Q6. What brand/make of phone have you recently purchased?

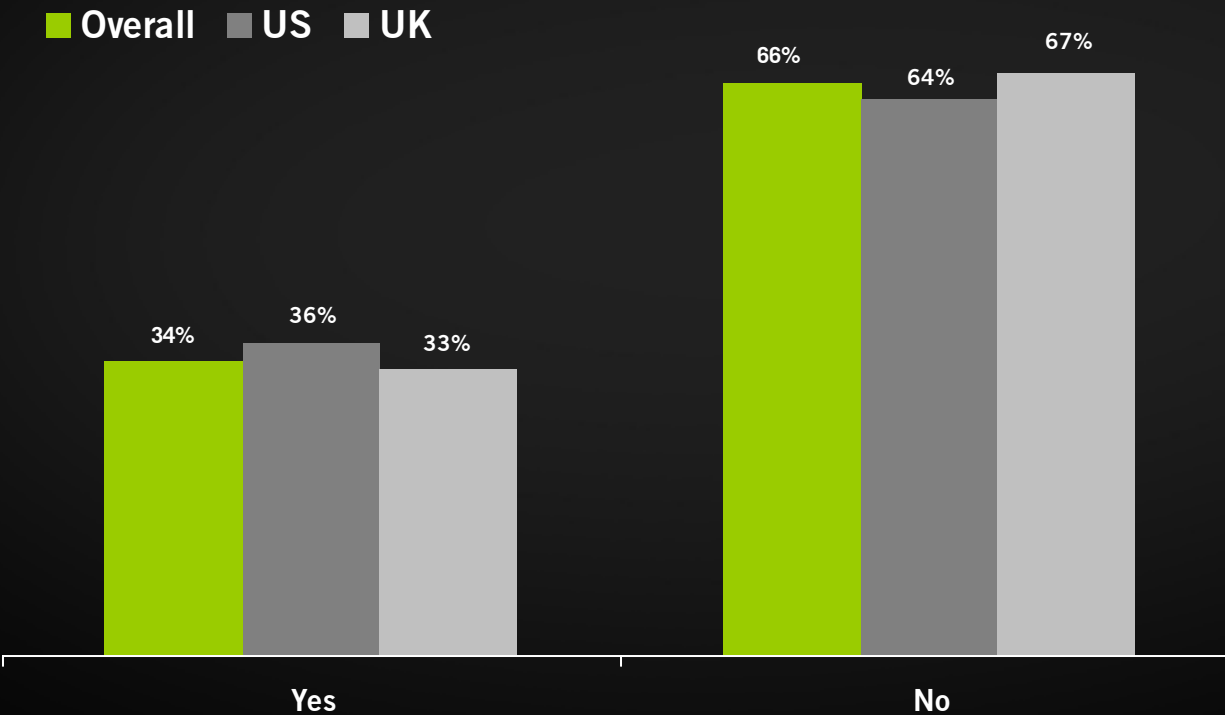
Excludes brands where base is too low to analyse, <50 (i.e. Apple and Blackberry).

Base: 692

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Laptop vs. mobile with Internet access

If you have a laptop, would you consider replacing your laptop with a mobile phone if it had the same functionality as your laptop, including access to the Internet?



66% of participants stated that they would not replace their laptop with a mobile phone with the same functionality.

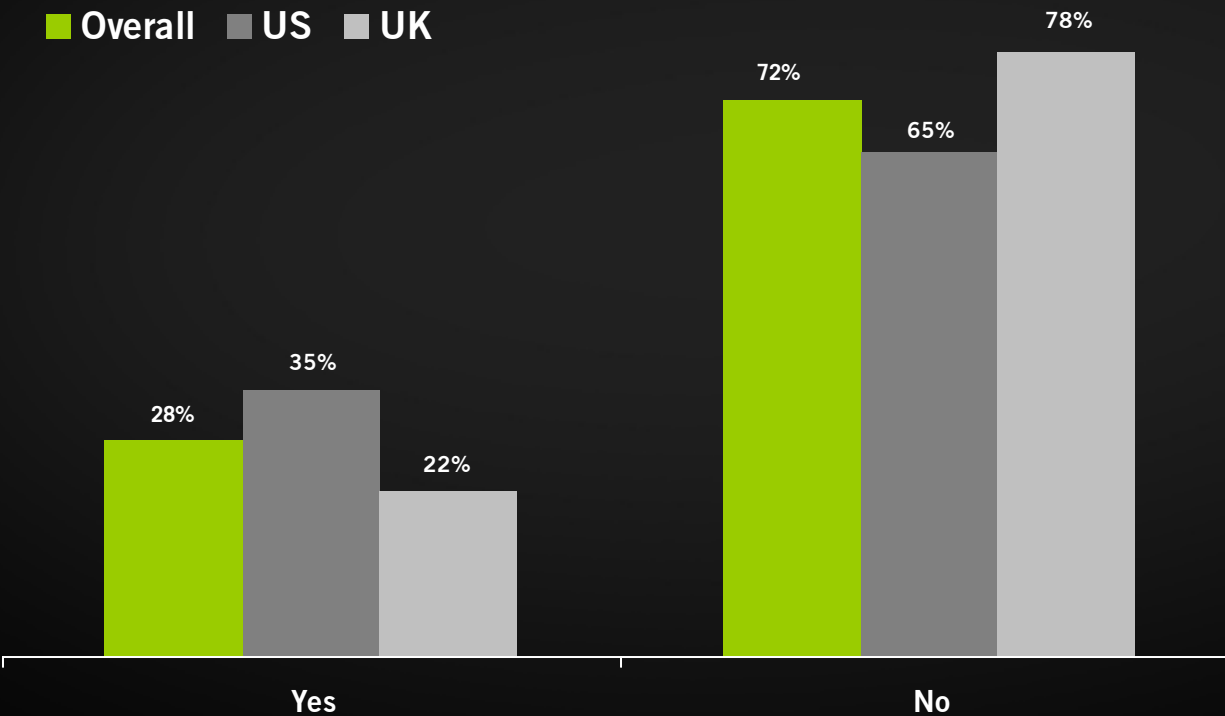
Q29. If you have a laptop, would you consider replacing your laptop with a mobile phone if it had the same functionality as your laptop, including access to the Internet? Excludes those who do not own a laptop.

Base: 1,541, US n = 748 UK n = 793

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Likelihood to work remotely/telecommute

In the light of recent increases in petrol/gasoline prices, are you working from home/working remotely more often?



28% of participants claim to be 'working from home/working remotely' more often given recent increases in petrol/gasoline prices.

Q30. In the light of recent increases in petrol/gasoline prices, are you working from home/working remotely more often? N.B.

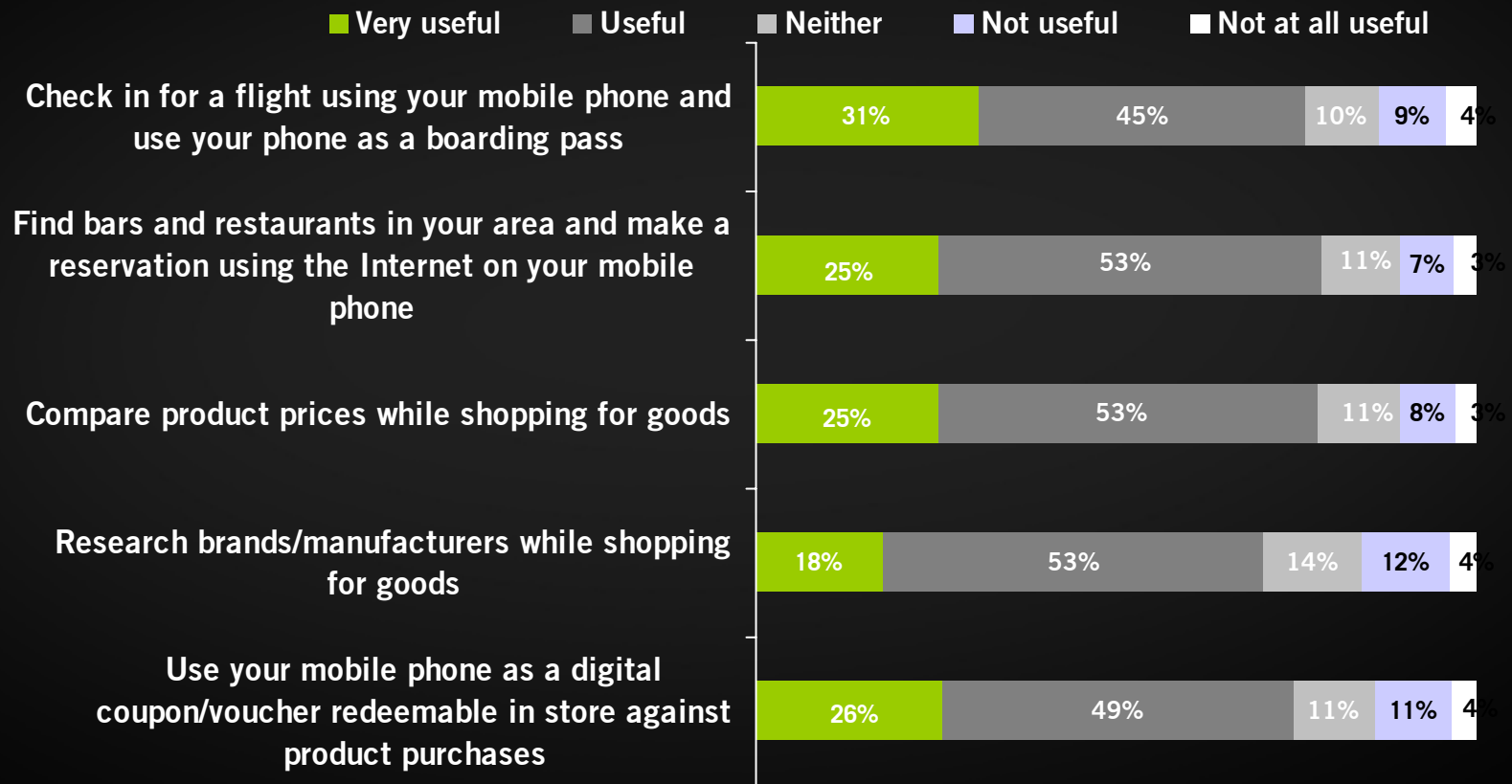
Ask only of all those in full/part time employment.

Base: 1,863, US n = 896 UK n = 967

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Appendix

Usefulness of advanced/additional mobile Internet activities

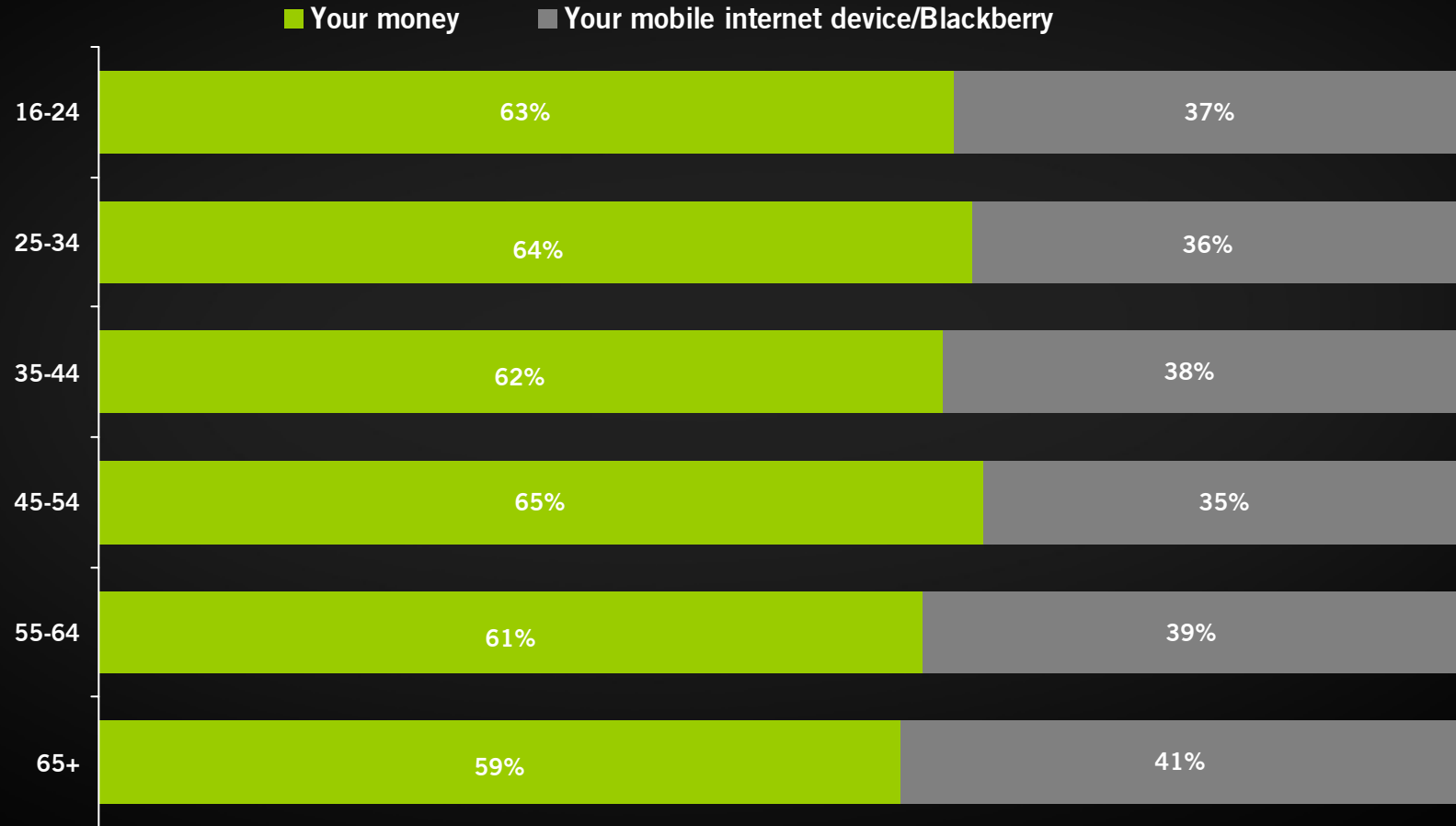


Q25. And how useful do you think it would be to do each of the following over the Internet on your mobile phone?

Base: 2,019

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

'What would you be more likely to give up?' by age



Q28. If you were mugged or robbed which would you be more likely to give up? By Q1. Please indicate which age band you fall under.

Base: 1,650

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

What else would you like to be available/accessible?

'wish I had a GPS on my phone.'

'some website are too big.'

'my signal / coverage is so bad couldn't get anything i would like to access sports results news etc.'

'check email and read news'

'My phone is not able to access the internet'

'web browsing & e-mail'

Q11. You told us that the reason you have never accessed the Internet using a mobile phone is because 'the things you want to do aren't available/accessible'. Could you please tell us what you would like to be available/accessible via the Internet on your mobile phone?

Base: 15

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

Interest in 'useful sites/tools'

'Better way of monitoring how much you have spent while on the internet or how much credit you have left of your internet usage.'

'Compass, GPS/Mapquest'

'faster than home connection and easier to navigate'

'make the links quick and easy to use'

'paying bills'

'Single click access.'

'Easy to navigate pages, like mini versions of the internet'

'Easier to access'

'it would be easier to do'

'maps, cheap GPRS'

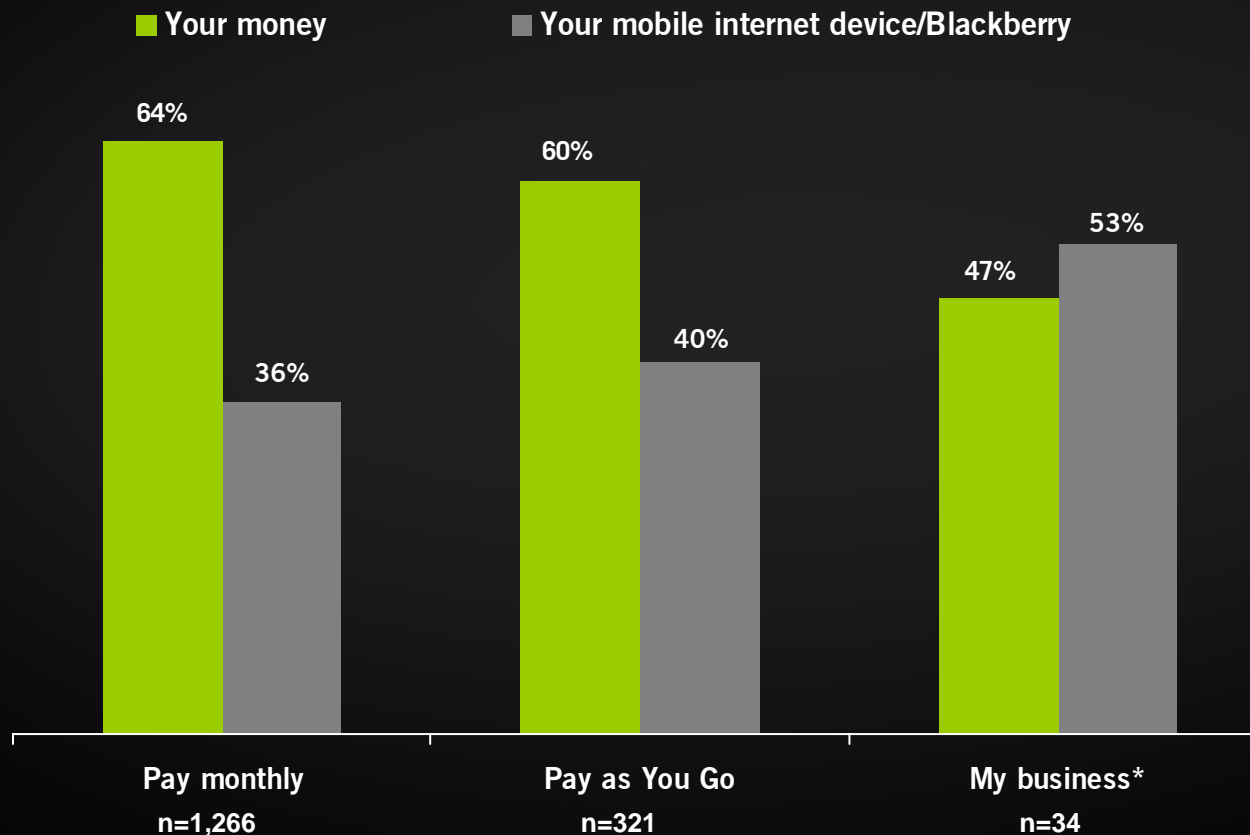
Q14. You told us that 'More useful sites/tools' would make you 'want to access the Internet using your mobile phone'. Could you please tell us what useful sites/tools you'd like to be available?

Base: 47

Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

'What would you be more likely to give up?' by working status

If you were mugged or robbed which would you be more likely to give up?

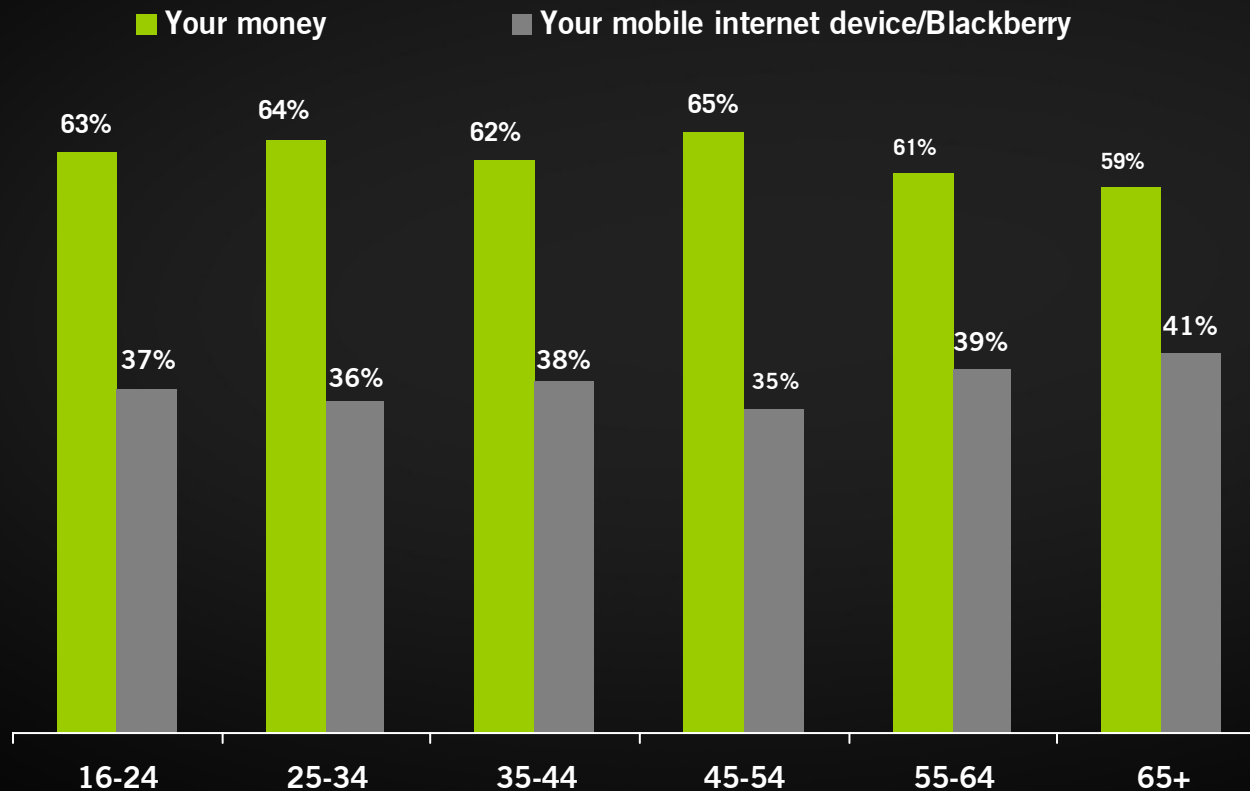


*N.B. Base size very low, please interpret with caution

Q28. If you were mugged or robbed which would you be more likely to give up?
Base: 1,621
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008

'What would you be more likely to give up?' by age

If you were mugged or robbed which would you be more likely to give up?



Q28. If you were mugged or robbed which would you be more likely to give up?
Base: 1,621
Source: Mobile Internet Usage and Attitudes Study, dotMobi & AKQA, May 2008