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Going Mobile: An International Study of Content Use and Advertising on the Mobile Web

March 2007

Conducted in partnership with



Online Publishers Association & OPA Europe

The Online Publishers Association (OPA) and OPA Europe are not-for-profit industry trade organizations dedicated to representing high-quality online content providers before the advertising community, the press, the government and the public.

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OPA Objectives

- To better understand the current dynamics of the global market for mobile Internet content and advertising, including providing insight into:
 - Which content areas are popular on mobile devices
 - Which media drive use of mobile content and applications
 - The role of online and offline content brands in the mobile space
 - The effect and impact of mobile advertising
 - The UI issues publishers should address to improve satisfaction with the mobile Internet

Methodology

- Over 6,000 interviews were conducted online December 2006 using TNS Sixth Dimension Interactive Panels in the following markets:
 - United States (n=1,011)
 - United Kingdom (n=1,004)
 - France (n=1,004)
 - Italy (n=1,007)
 - Germany (n=1,051)
 - Spain (n=1,020)
 - Samples were weighted to reflect each country's mobile population

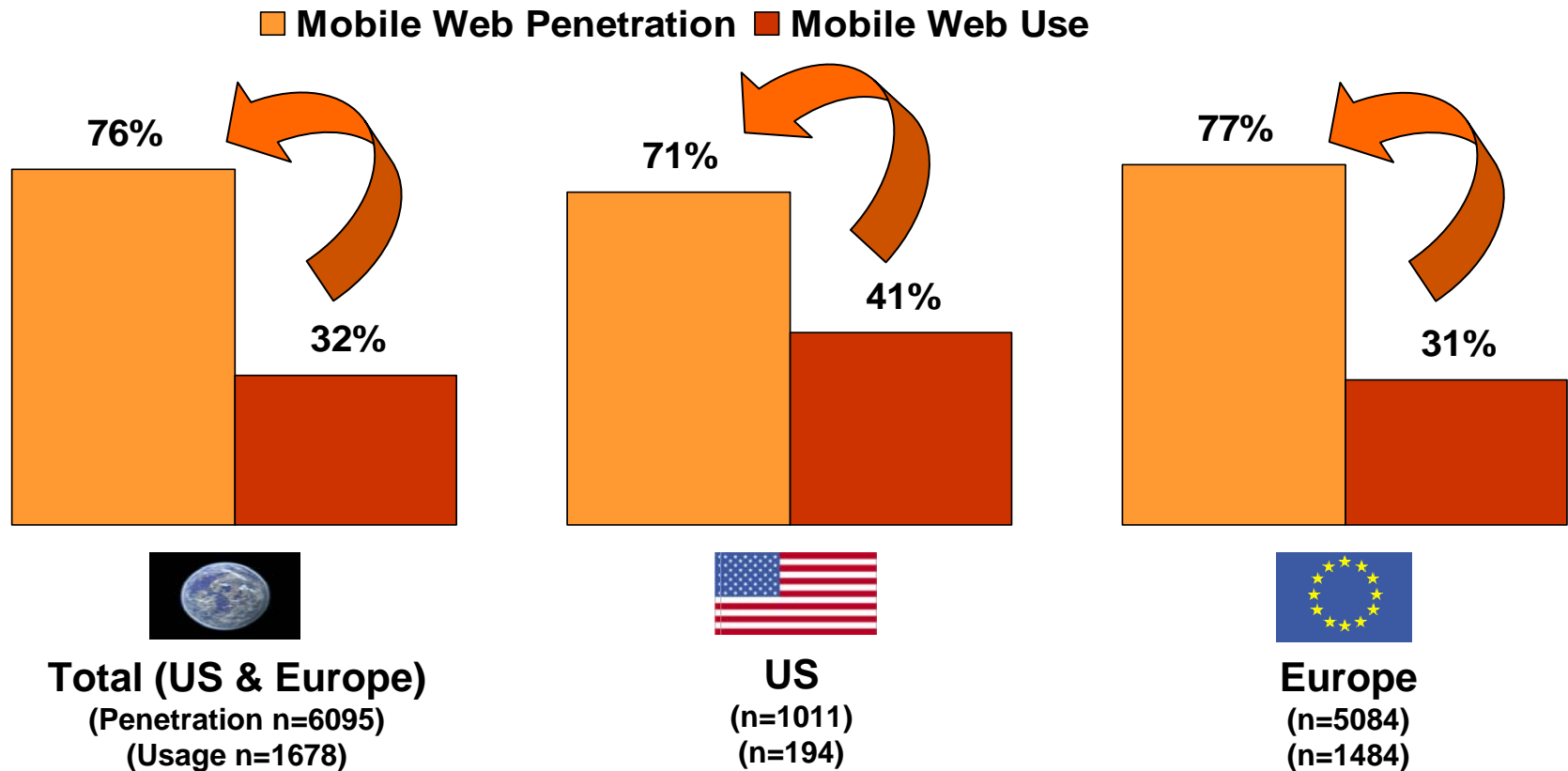
Executive Summary

The rich platform offered by the mobile Web is demonstrated by *Going Mobile's* key findings:

- **Access** to the mobile Web is widespread and usage will continue to grow in 2007
- **Advertising** works on the mobile Web – both in terms of receptivity and action
- **Brands** play a significant role in driving mobile Web activity
- **People** depend on the mobile Web for key content and are actively registering, personalizing and paying for content

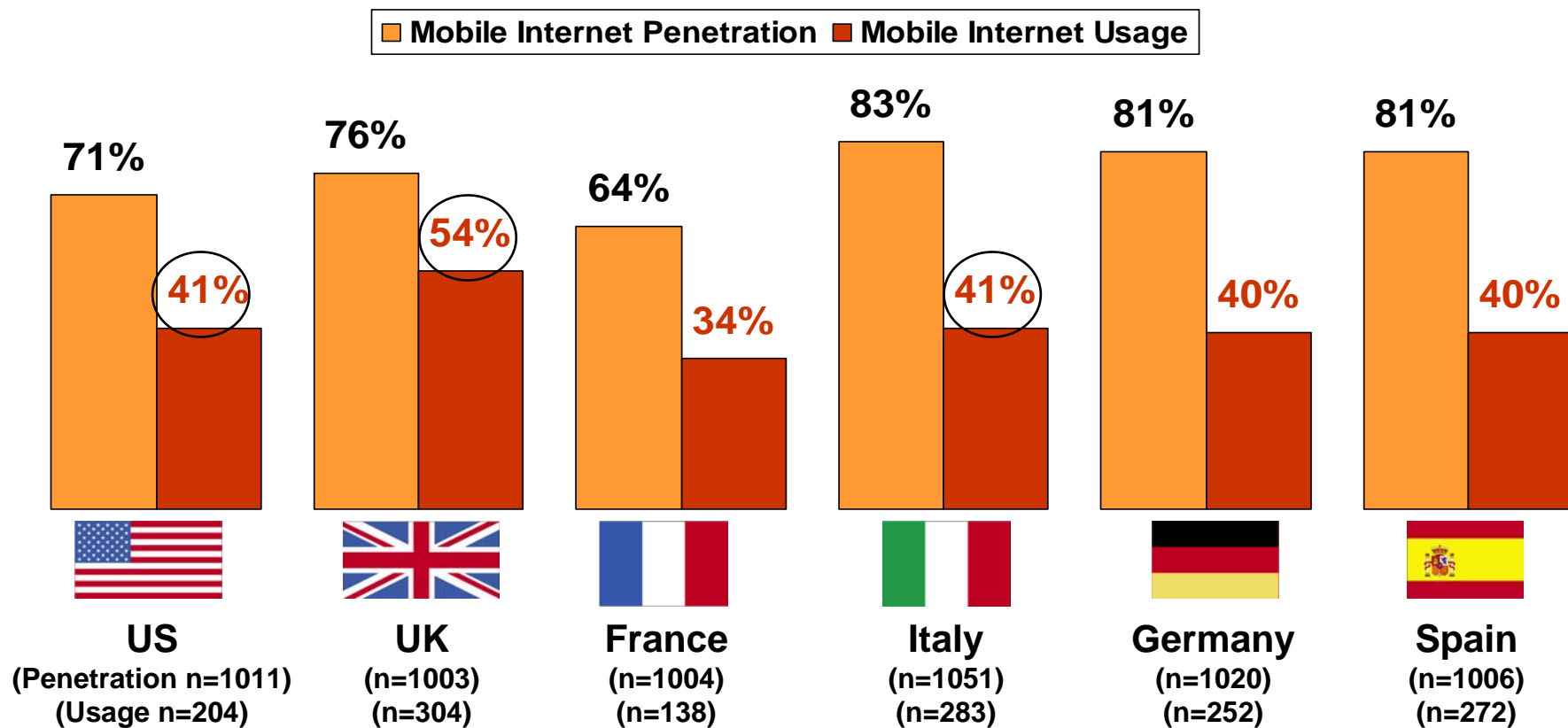
Mobile Internet

Internationally, over 75% of Mobile Device Owners Have Web Access



Base: Penetration = Total Respondents; Usage = Mobile Internet Users
Q09a. Which statement best reflects your usage of the mobile Internet?

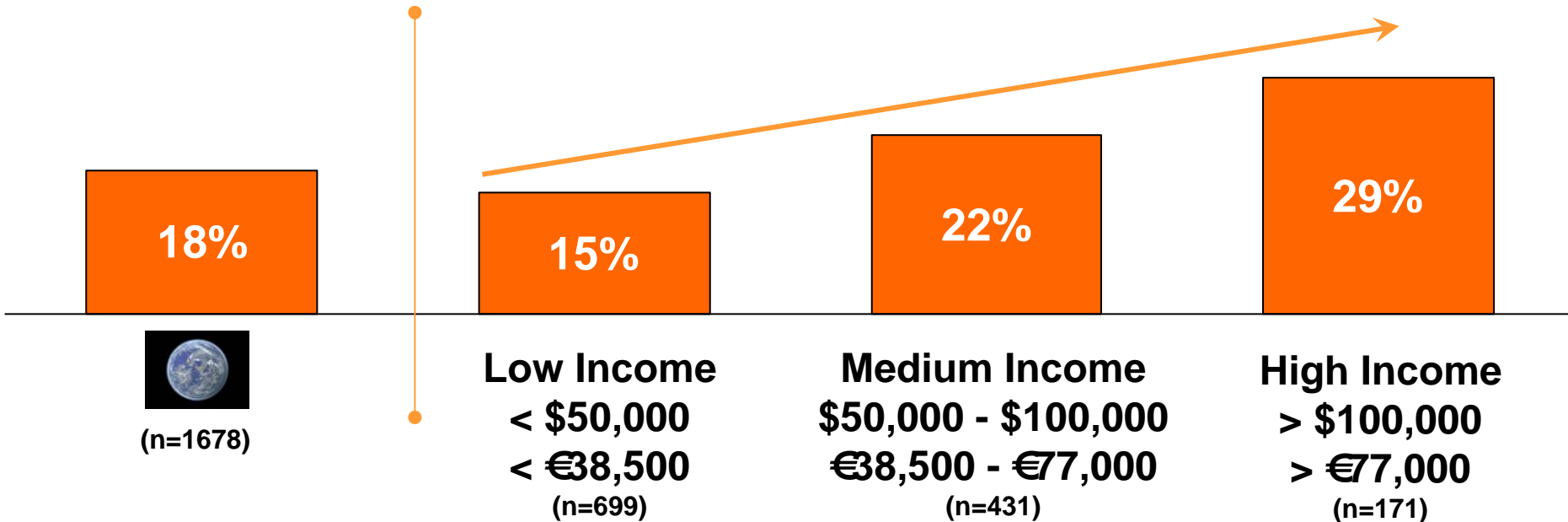
The UK Leads in Use (54%), Followed by Italy and US with 41%



Base: Penetration = Total Respondents; Usage = Mobile Internet Users
 Q09a. Which statement best reflects your usage of the mobile Internet?

Income is a Key Driver of Expected Increased Time with the Mobile Web

MORE MOBILE INTERNET TIME, NEXT 12 MONTHS
BY INCOME

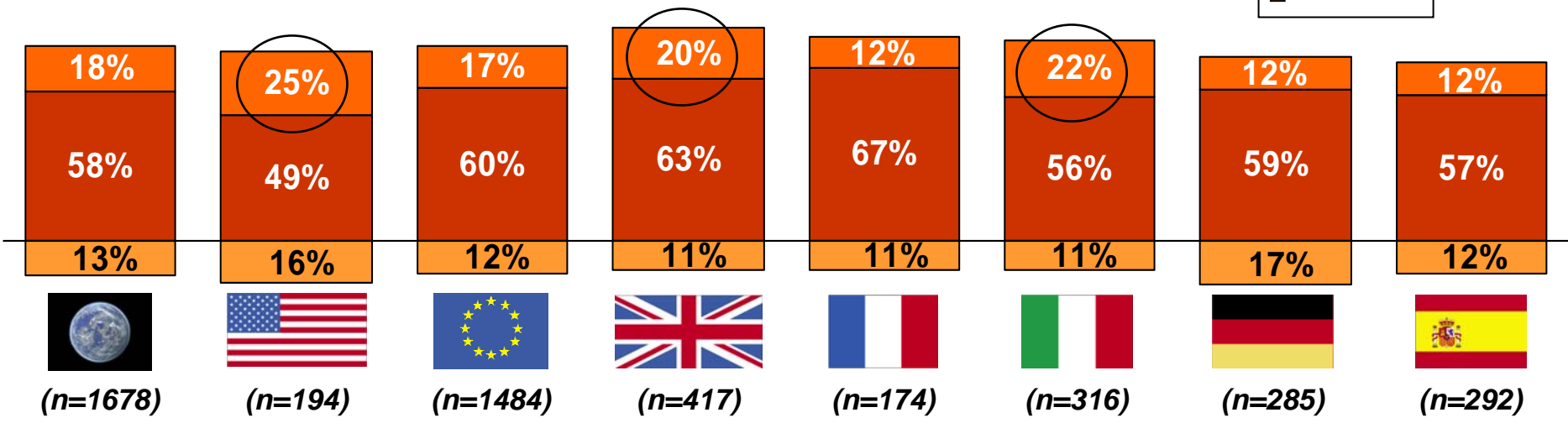


Base: Respondents who use Mobile Internet (income asked of respondents age 18+)

Q21b. In the next year do you believe you will spend more time, about the same amount of time or less time accessing the Internet on your mobile device?

US, UK and France Will Experience the Greatest Increase in Mobile Internet Use in 2007

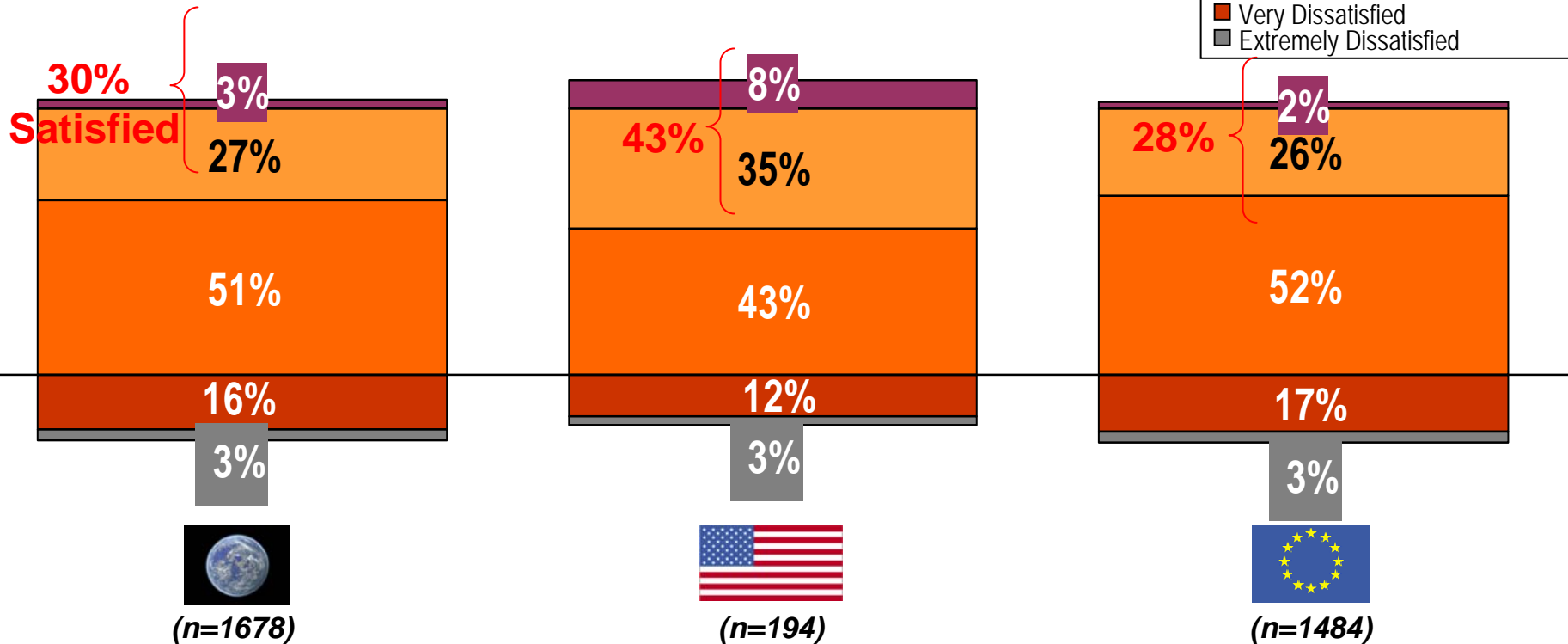
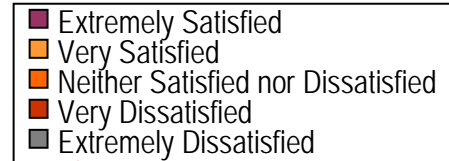
EXPECTED MOBILE INTERNET TIME, NEXT 12 MONTHS



Base: Respondents who use Mobile Internet (n=1678)
 Q21b. In the next year do you believe you will spend more time, about the same amount of time or less time accessing the Internet on your mobile device?

About 1/3 are Satisfied with Mobile Internet – Satisfaction Significantly Higher in US

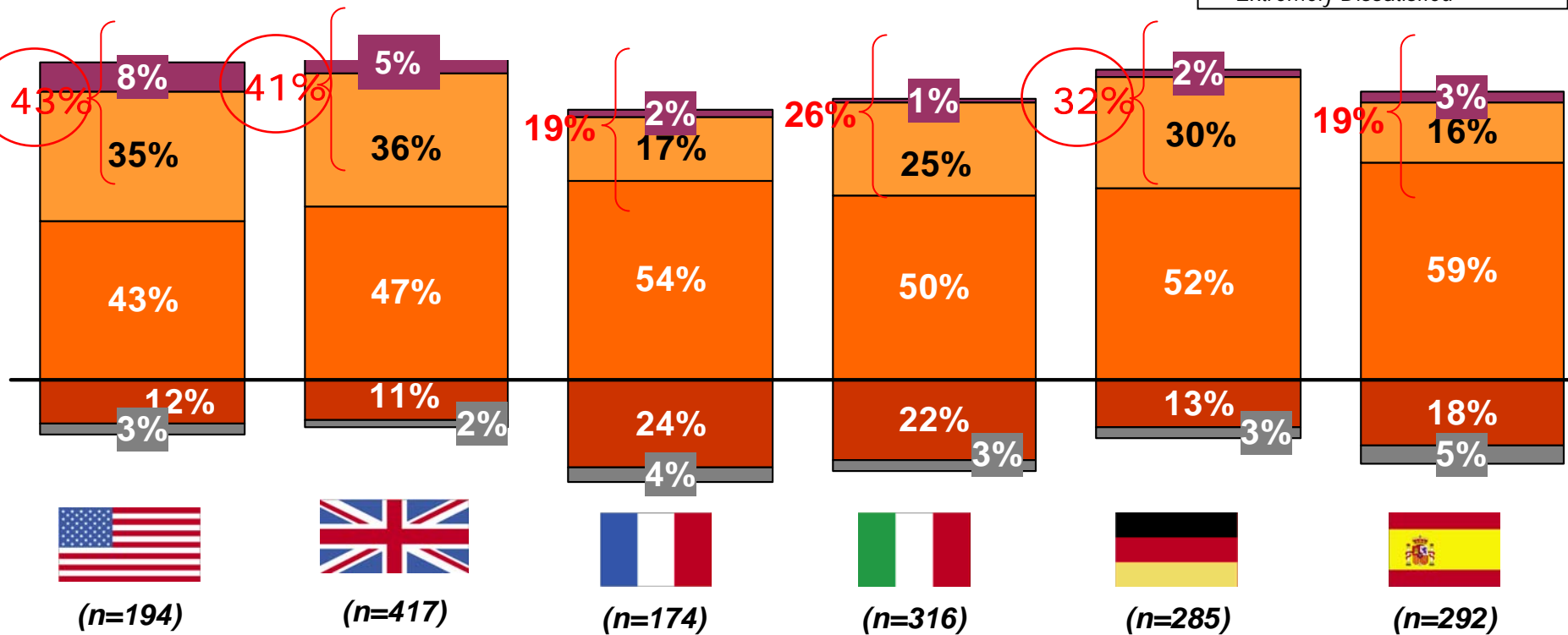
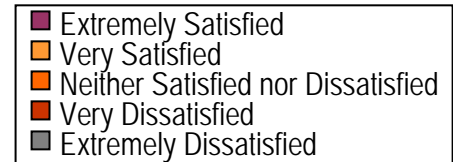
MOBILE INTERNET SATISFACTION



Base: Respondents who use Mobile Internet
 Q27. How satisfied are you with the mobile Internet overall?

Mobile Internet Satisfaction in the UK and Germany Rivals US

MOBILE INTERNET SATISFACTION



Base: Respondents who use Mobile Internet
Q27. How satisfied are you with the mobile Internet overall?

Site Load Time is the Biggest Source of Dissatisfaction for Mobile Internet Users



(n=1678)



(n=194)



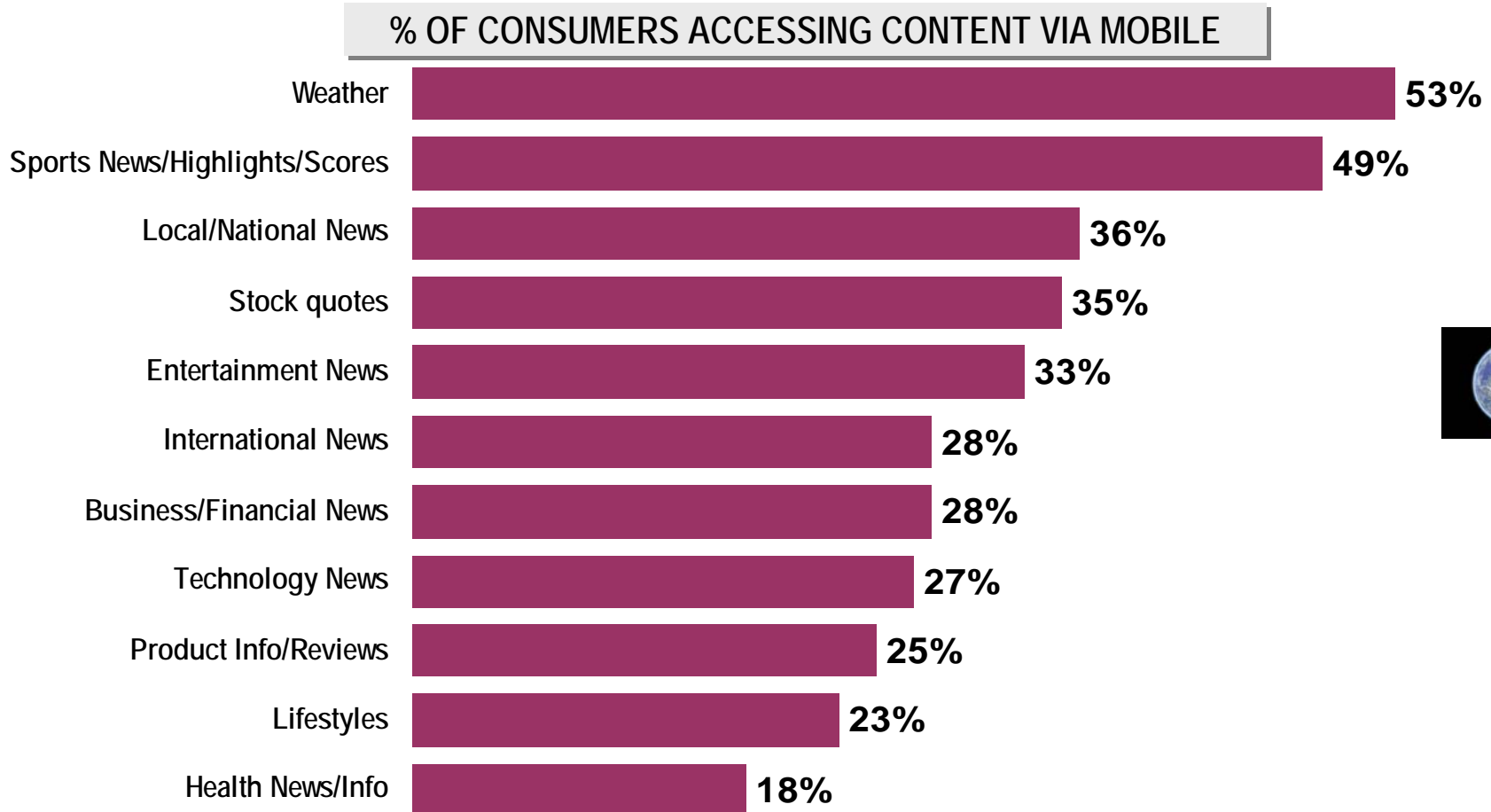
(n=1484)

1 st	Site Load Time	Site Load Time	Site Load Time
2 nd	Site Navigation	Web Page Layout	Site Navigation
3 rd	User Friendliness	Site Navigation	User Friendliness

Base: Respondents who use Mobile Internet
Q26 Please rate your satisfaction with these mobile Internet features (Bottom 2 Box Extremely/Very Dissatisfied)

Mobile Content

Consumers of Weather, Sports, News and Stocks Rely Heavily on the Mobile Internet

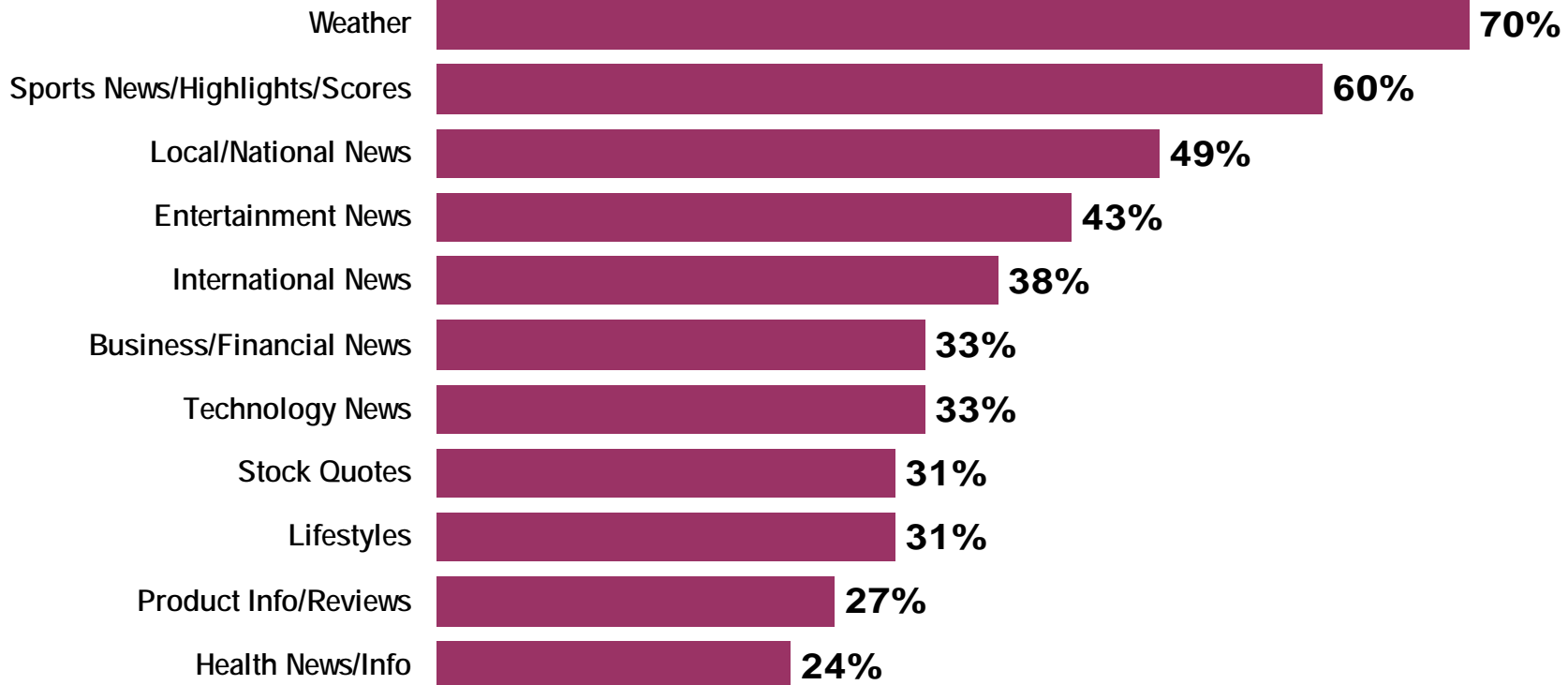


Base: Internet Users Who Access Content Vertical (Base Varies)
Q15. Which of the following content categories do you surf using your mobile phone?

*Mobile= (Mobile Only%+ Both%) / Total%

In the US, Weather and Sports are Most Accessed, Followed by News & Entertainment

% OF CONSUMERS ACCESSING CONTENT VIA MOBILE

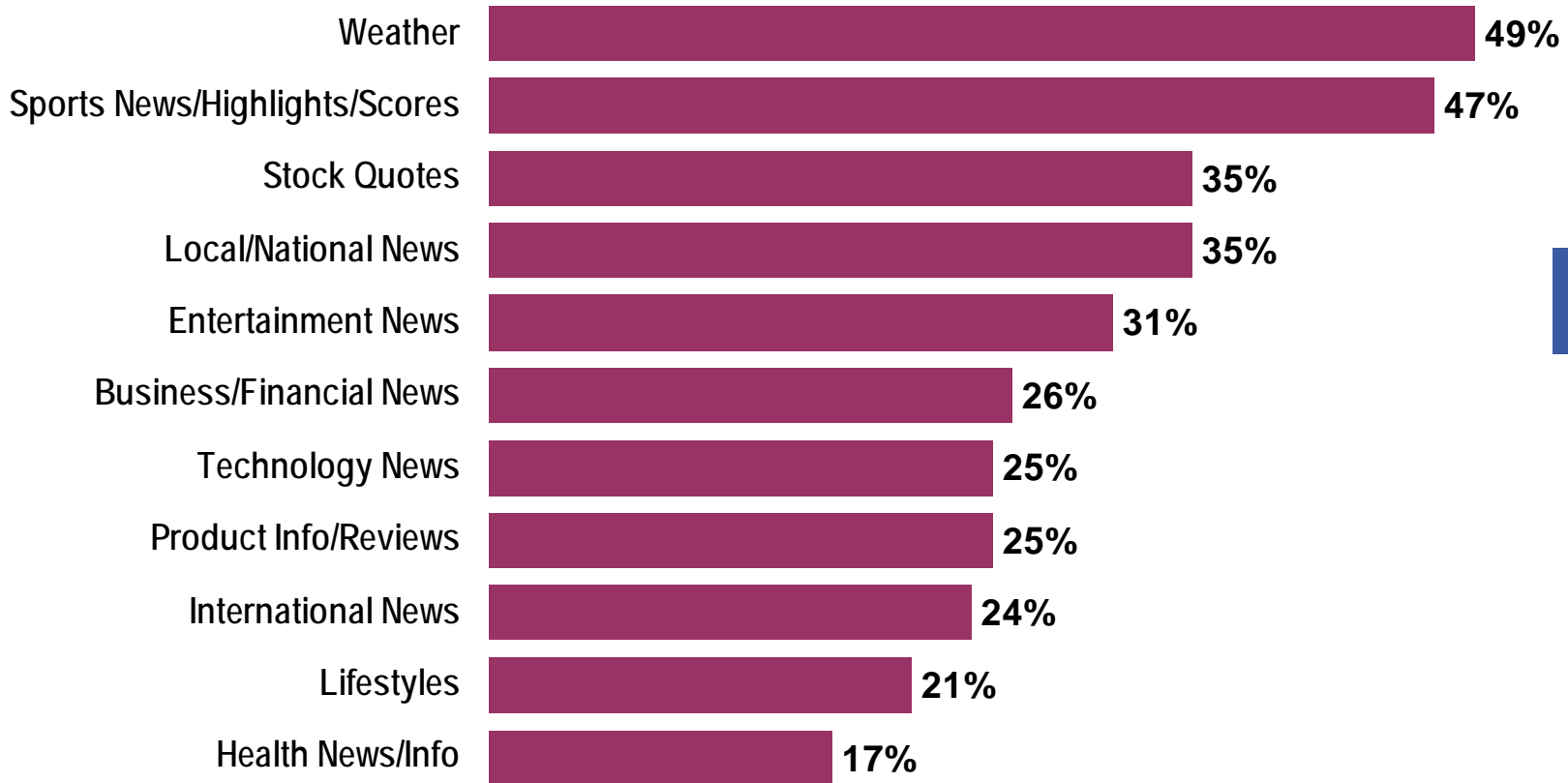


Base: US Internet Users Who Access Content Vertical (Base Varies)
Q15. Which of the following content categories do you surf using your mobile phone?

*Mobile= (Mobile Only%+ Both%) / Total%

Europeans also Access Weather and Sports More Often, Followed by Stock Quotes & News

% OF CONSUMERS ACCESSING CONTENT VIA MOBILE

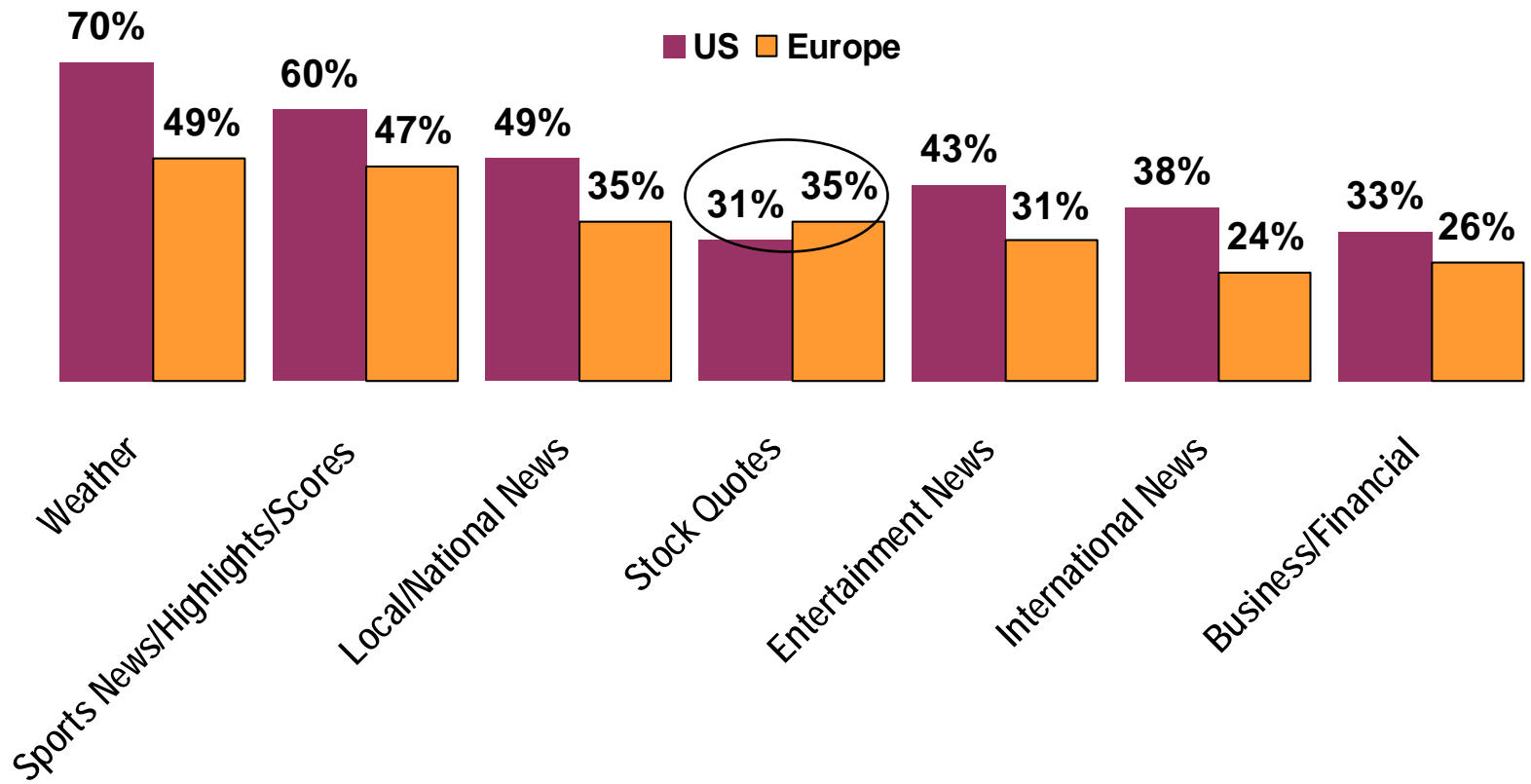


Base: Europe Internet Users Who Access Content Vertical (Base Varies)
Q15. Which of the following content categories do you surf using your mobile phone?

*Mobile= (Mobile Only+ Both%) / Total%

US Users Exceed Europeans in Accessing Top Mobile Content Categories, Except Stock Quotes

% OF CONSUMERS ACCESSING CONTENT VIA MOBILE



Base: US & Europe Mobile Internet Users Who Access Content Vertical (Base Varies) Q15. Which of the following content categories do you surf using your mobile phone?

*Mobile= (Mobile Only%+ Both%) / Total%

US Mobile Web Users Personalize Sports Content the Most, Followed by Weather and Stocks; Most Purchased Content is Tech, Product Info and Lifestyles

Users Accessing Content Category Who..	Register %	Personalize %	Pay %
Stock Quotes	61	61	14
Business/Financial News	61	54	5
Local/National News	58	58	10
Weather	55	71	14
International News	51	17	9
Technology News	49	35	24
Sports News/Highlights/Scores	47	73	8
Entertainment News	46	48	15
Health News	43	47	14
Product Info/Reviews	43	24	20
Lifestyles	37	33	21



Base: US Mobile Internet Users Who Access Content Vertical (Base Varies)
 Q17-18. Have you registered/paid a fee/personalized the following content sites on your mobile device?

In Europe, Paying for Mobile Web Content Reaches Double-Digit % for Almost All Categories; Personalizing Content Highest Among Those Accessing Stocks and Weather

<i>Users Accessing Content Category Who..</i>	Register %	Personalize %	Pay %
Stock Quotes	66	60	13
Business/Financial News	54	35	14
Local/National News	52	39	13
International News	48	27	11
Technology News	48	29	14
Product Info/Reviews	47	25	12
Weather	44	43	14
Lifestyles	43	32	9
Sports News/Highlights/Scores	42	40	16
Entertainment News	42	35	13
Health News	41	35	13



Base: Europe Mobile Internet Users Who Access Content Verticals (Base Varies)
 Q17-18. Have you registered/paid a fee/personalized the following content sites on your mobile device?

US Users are More Likely to Personalize Content; Paying for Content Differs Between US and Europe

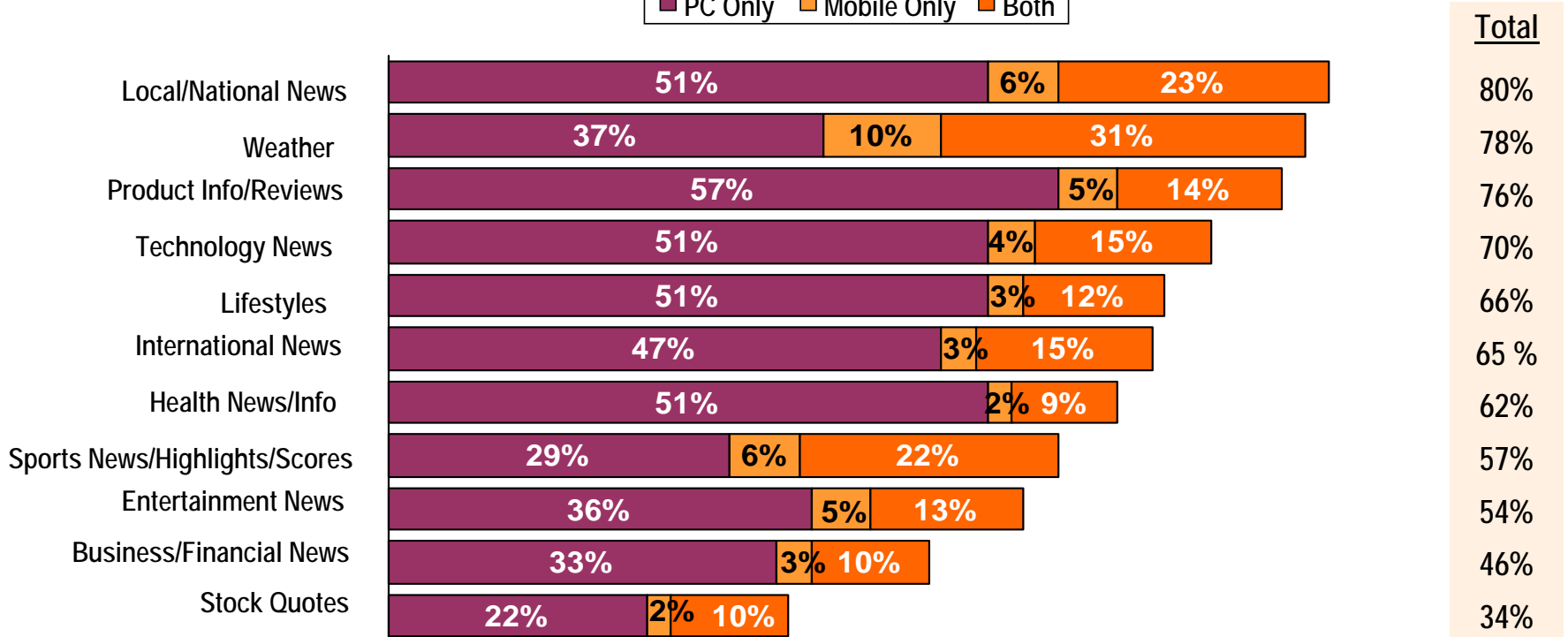
<i>Users Accessing Content Category Who...</i>	US Personalize %	Europe Personalize %	US Pay %	Europe Pay %
Stock Quotes	61	60	14	13
Business/Financial News	54	35	5	14
Local/National News	58	39	10	13
Weather	71	43	14	14
International News	17	27	9	11
Technology News	35	29	24	14
Sports News/Highlights/Scores	73	40	8	16
Entertainment News	48	35	15	13
Health News	47	35	14	13
Product Info/Reviews	24	25	20	12
Lifestyles	33	32	21	9

Mobile Internet Users are Heavy Consumers of Content across Verticals – both via Mobile and PC Internet



■ PC Only ■ Mobile Only ■ Both

% Accessing on PC, Mobile or Both



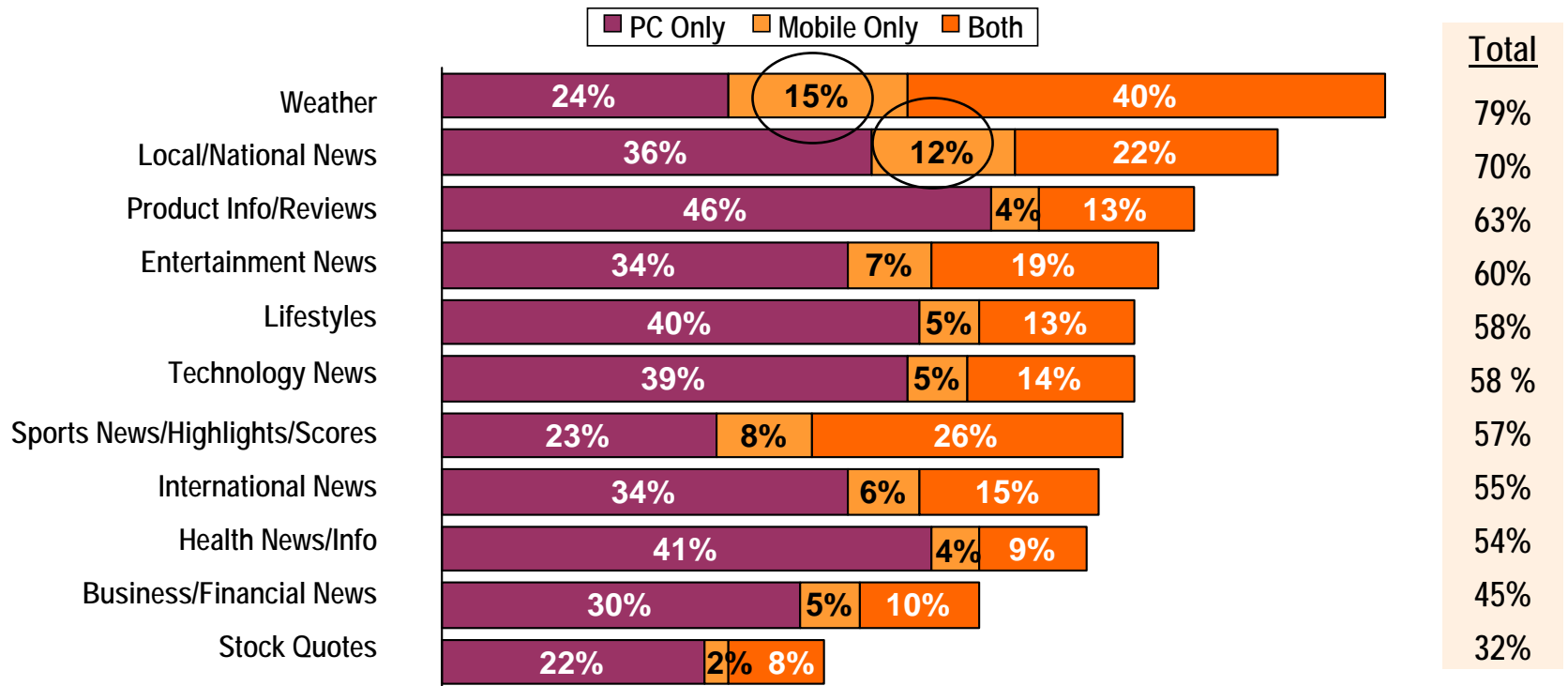
Base: Mobile Internet Users (n=1678)

Q15. Which of the following content categories do you surf using your mobile phone, PC or both?

In the US, Weather and News Have Significant “Mobile-Only” & “Both” Audiences; Sports & Entertainment Also Ranks High for “Both”



% Accessing on PC, Mobile or Both



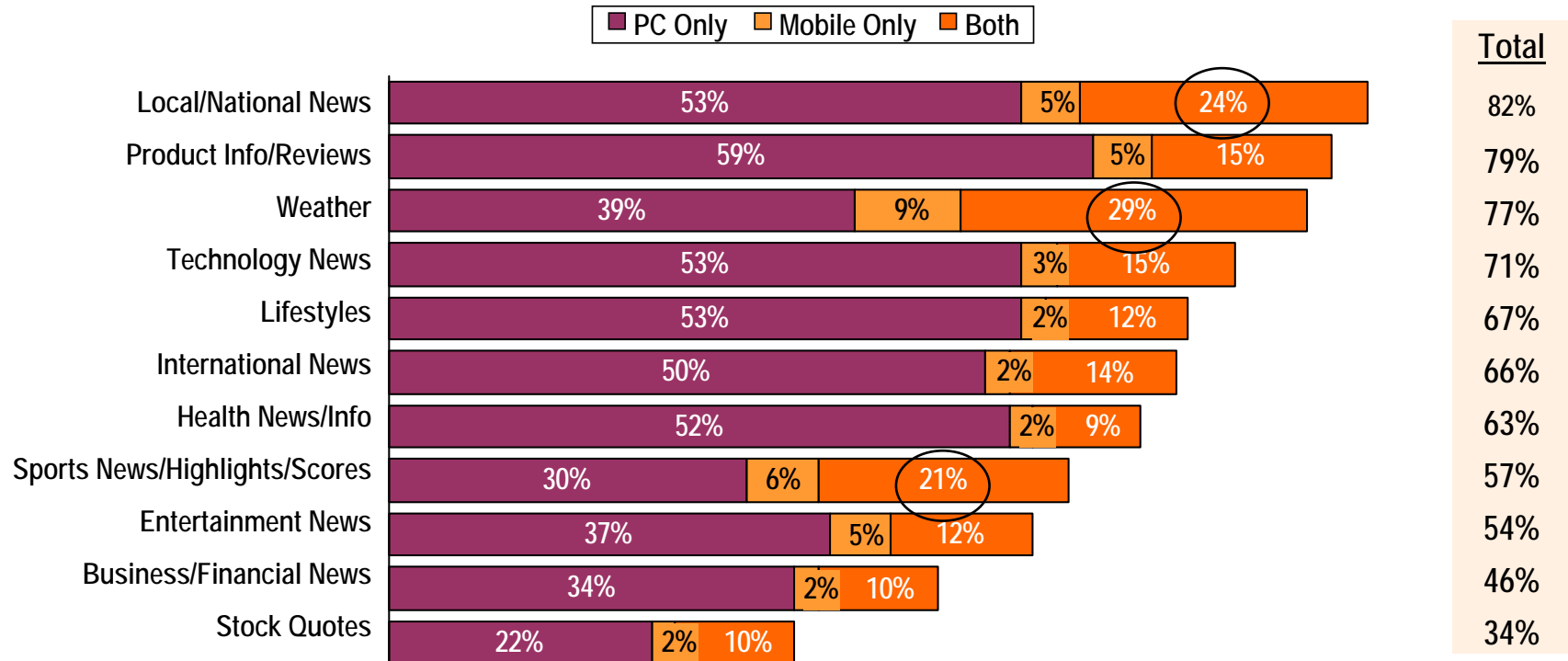
Base: US Mobile Internet Users (n=194)

Q15. Which of the following content categories do you surf using your mobile phone, PC or both?

In Europe, Weather Also Leads for “Mobile-Only” Access and Weather, News and Sports Rank High for “Both” – Mobile and PC



% Accessing on PC, Mobile or Both

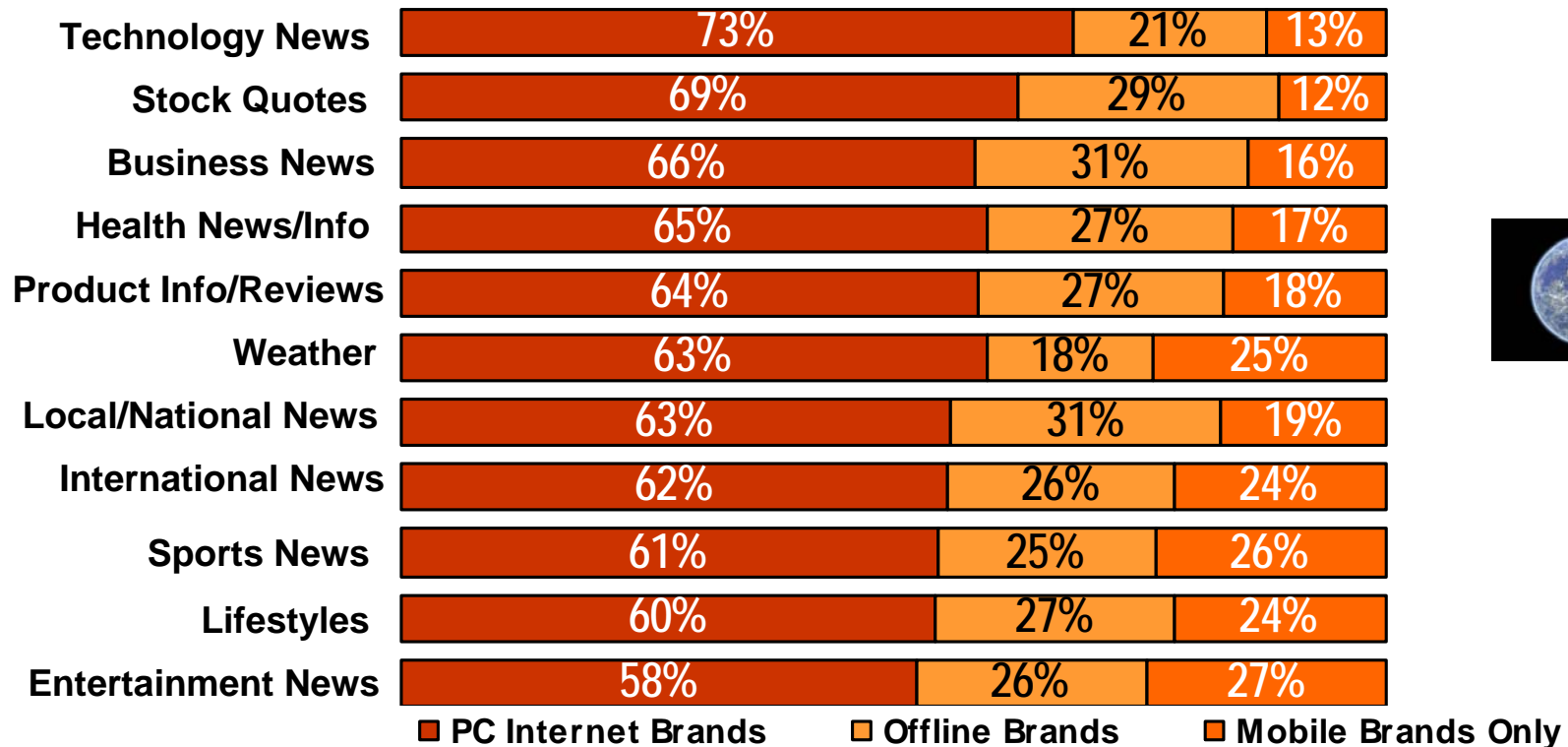


Base: Europe Mobile Internet Users (n=1484)

Q15. Which of the following content categories do you surf using your mobile phone, PC or both?

PC Content Brands Drive Usage on Mobile Web

SOURCE OF MOBILE CONTENT: MOBILE, PC & OFFLINE BRANDS



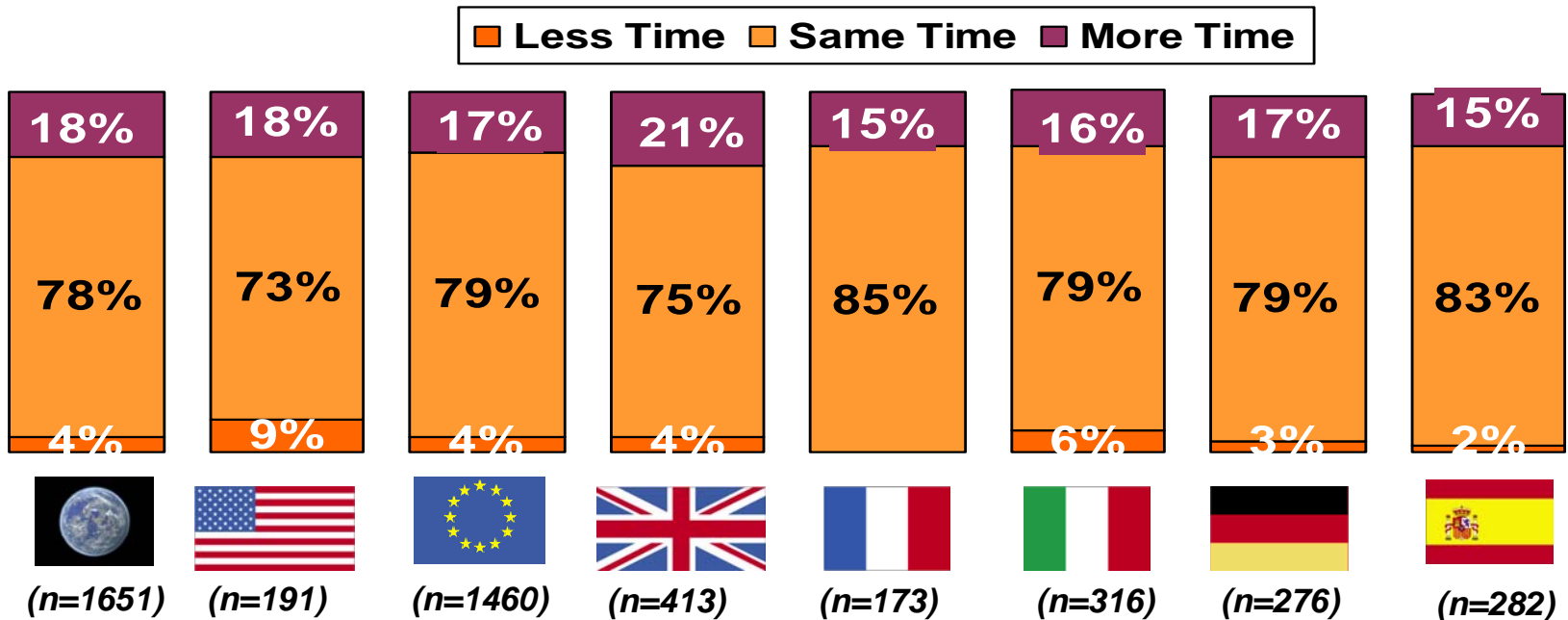
Base: Respondents who visit these sites on PC and Mobile device and Mobile device only (Base size varies)

Q.21a. The following sites I visited on my mobile phone/device are...

Note will add to more than 100% due to multiple responses

Mobile Internet is Not Replacing Time with the PC Internet – it Increases Overall Web Use

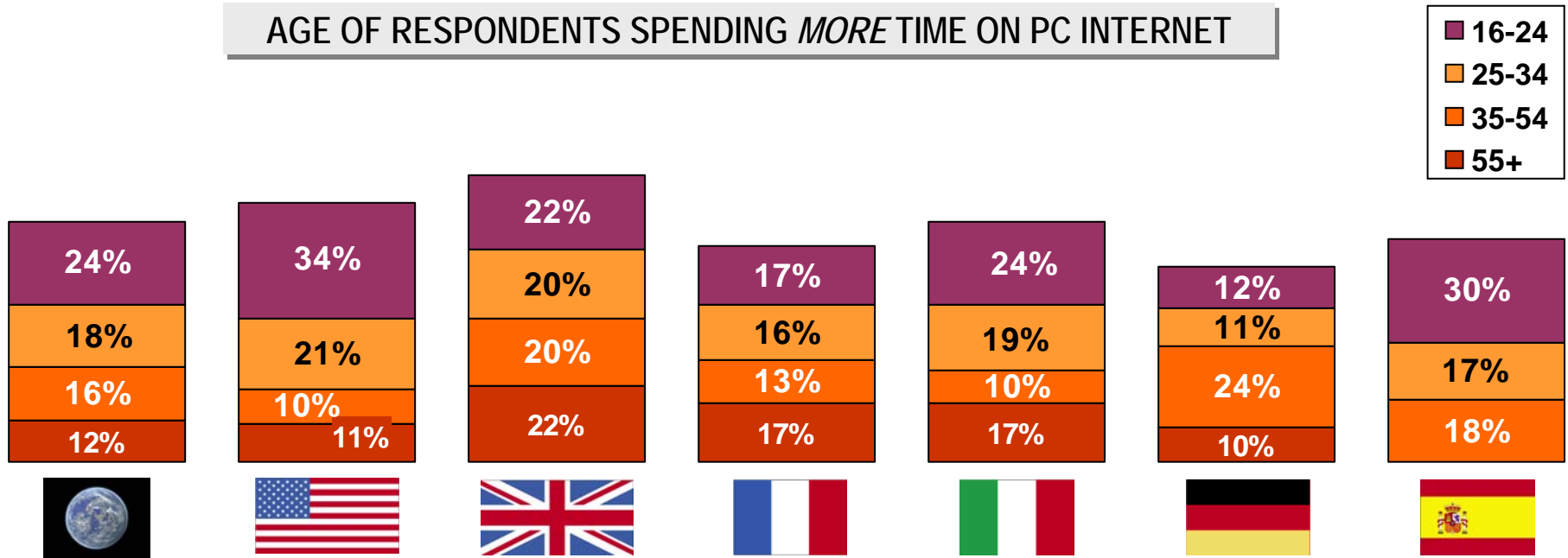
TIME SPENT ON PC INTERNET SINCE ACCESSING MOBILE INTERNET



Base: Mobile Internet Users
 Q20b. Select the statement which most accurately describes the time you spend on the Internet


Increase in PC Internet Use Crosses All Age Groups; Largest Among Younger Audiences

AGE OF RESPONDENTS SPENDING *MORE* TIME ON PC INTERNET



Base: Mobile Internet users who spend more time accessing PC Internet
 Q20b. Select the statement which most accurately describes the time you spend on the Internet

Mobile Internet and Content Consumers are More Likely Male, Younger and Higher Income than Mobile Device Owners Who Do Not Access the Mobile Web

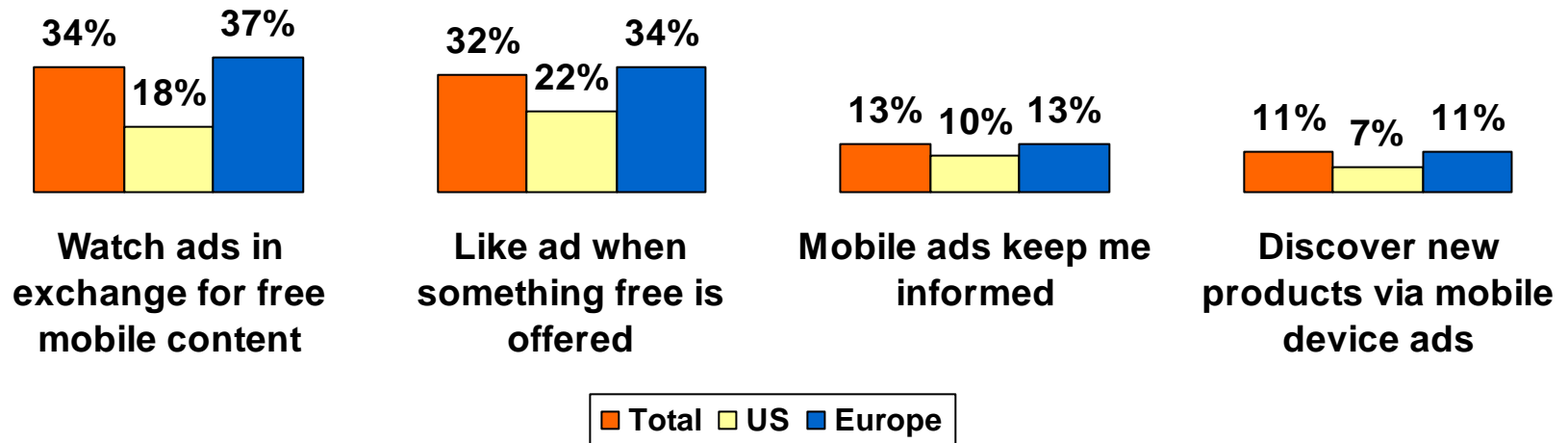
	Total Mobile Device Owners	Total Mobile Internet Users	Total Mobile Content Users
Male	48%	53%	58%
Female	52%	47%	42%
Age			
16-24 years old	17%	26%	19%
25-34	15%	30%	18%
35-54	36%	26%	37%
55+	32%	18%	26%
Income			
Low Income	59%	52%	48%
Medium Income	31%	35%	36%
High Income	10%	13%	16%

Note: Low Income = <\$50K, <€38.5K; Med Inc = \$50-70K, €38.5-77K; High Inc = \$100K+, €77K+

Mobile Advertising & Marketing

Consumers are Receptive to Mobile Advertising in Exchange for Content and Other Free Services

MOBILE ADVERTISING: STRONGLY/SOMEWHAT AGREE

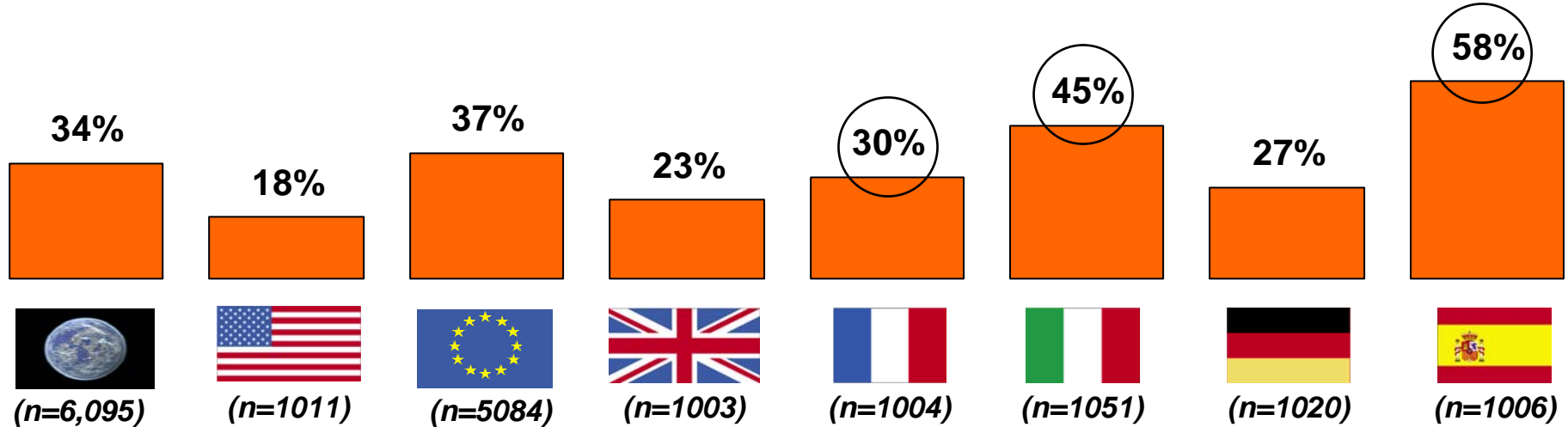


Base: Total Respondents (n=6095)
US Total Respondents (n=1011)
EU Total Respondents (n=5084)

Q32. How much do you agree or disagree with each of the following statements related to mobile advertising? (5 point scale)

Receptivity to Mobile Advertising in Exchange for Content is Especially High in Spain, Italy and France

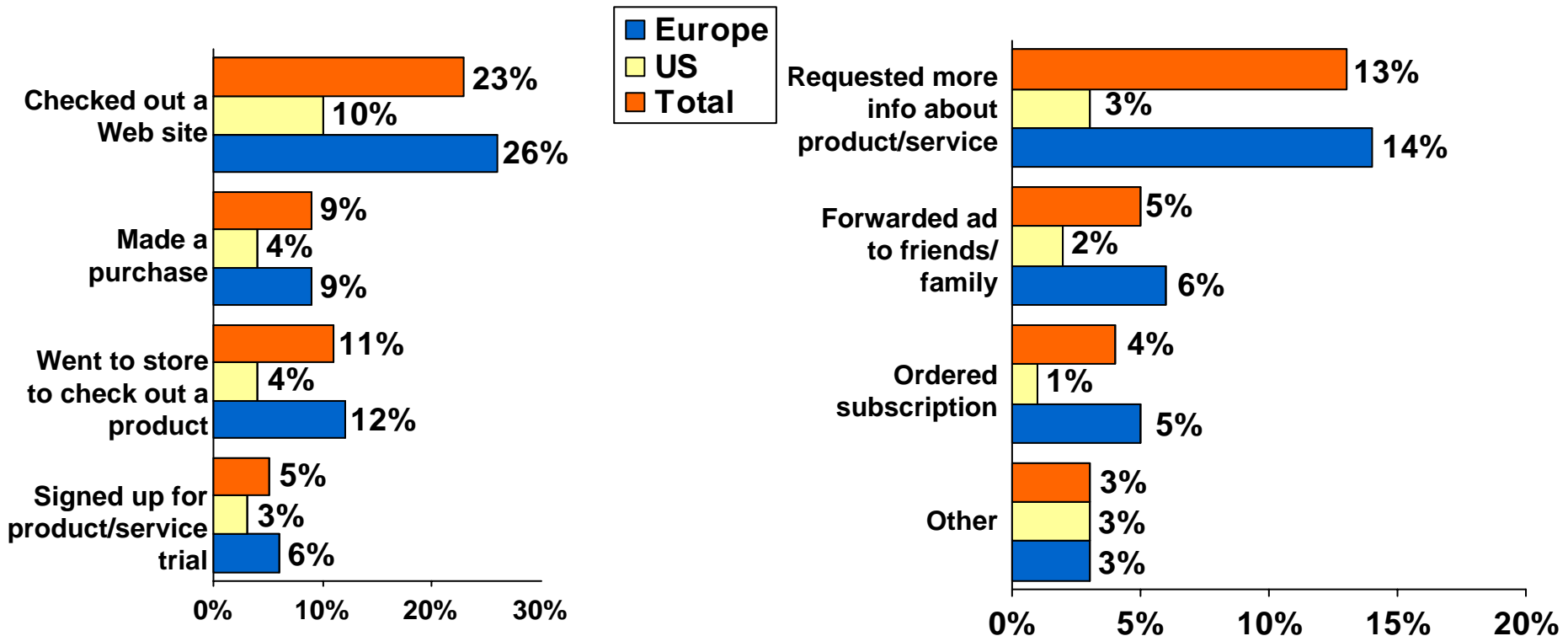
I PREFER ADS IN EXCHANGE FOR NOT PAYING FOR MY FAVORITE MOBILE CONTENT:
STRONGLY/SOMEWHAT AGREE



Base: Respondents who prefer watching ads in exchange for not having to pay for their favorite mobile content
Q32. How much do you agree or disagree with each of the following statements related to mobile advertising. (5 point scale)

Mobile Ads Drive Website and Brick-n-Mortar Visits, and Desire for Product Information

ACTIONS TAKEN AS RESULT OF SEEING MOBILE WEB ADVERTISEMENTS

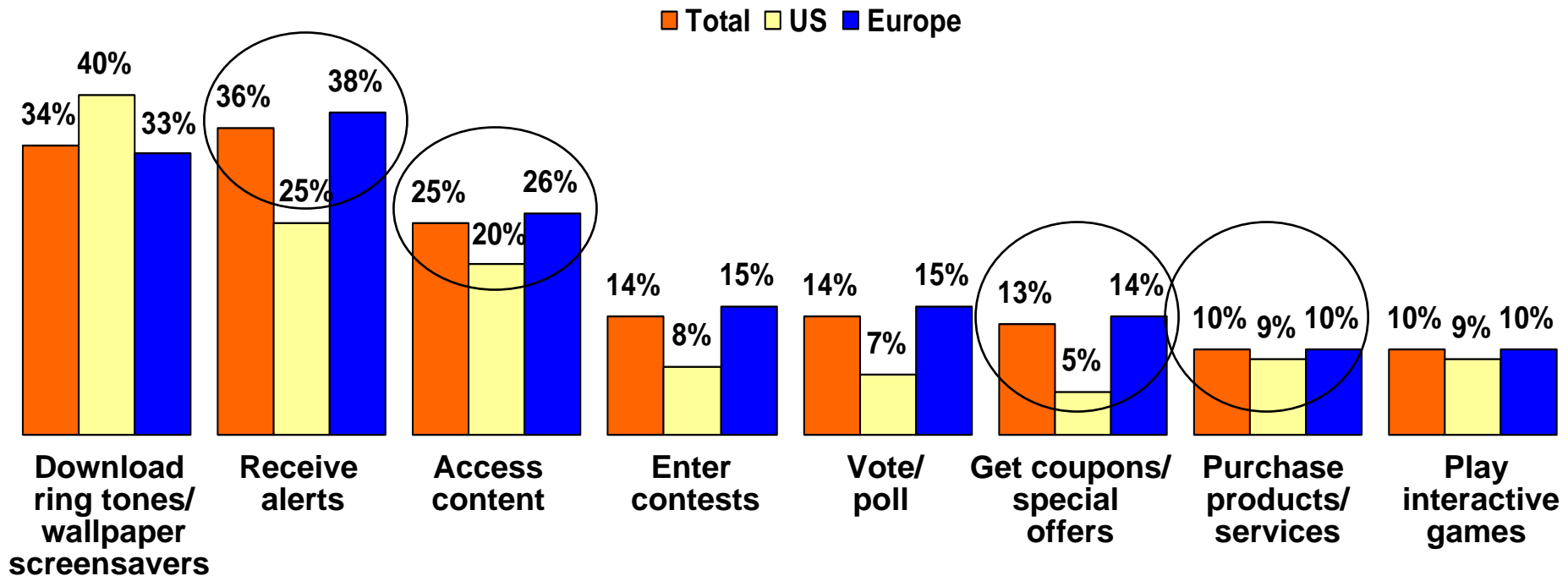


Base: US Total Respondents (n=1011) Europe Total Respondents (n=5084)

Q.33 Which of the following have you ever done as the result of seeing an ad on the Mobile Internet?

Receiving Mobile Alerts and Accessing Content are Popular Features, with Mobile Device Owners also Engaging in E-commerce

INTERACTIVE FEATURES USED



Base: Total Respondents (n=6095) US Total Respondents (n=1011) Europe Total Respondents (n=5084)
 Q35. Which of the following interactive features do you use on your mobile phone?

In US and Europe, the PC Internet Motivates a Variety of Mobile Web Purchases and Applications

MEDIA THAT MOTIVATE MOBILE APPLICATIONS USAGE



	Purchase products/ services	Get coupons/ special offers	Access content	Receive alerts	Download ring tones/ wallpapers/ screensavers	Enter contests	Vote/poll	Play interactive games
PC Internet	60%	69%	57%	52%	55%	48%	58%	48%
Mobile	32%	27%	29%	25%	24%	19%	26%	24%
TV	47%	37%	31%	23%	32%	71%	57%	66%
Radio	25%	28%	19%	16%	14%	36%	34%	31%
Magazines	37%	40%	24%	17%	29%	39%	27%	31%
Newspaper	30%	32%	21%	16%	16%	30%	23%	25%
Outdoor	23%	25%	13%	10%	9%	18%	16%	19%

Base: Total: Total Respondents who use each interactive feature on their mobile phone (Base size varies)
 Q.36. Which of the following sources, if any motivated you to use your mobile phone to...

Key Findings

Key Findings

- Mobile Web access is now nearly ubiquitous; usage lags access, but strong growth expected in '07
- Weather and Sports Information are the most popular on the mobile Web
- Both paid content and advertising are working on the mobile Web
- Mobile Web consumers are most likely to register and personalize Stock & Business News followed by Weather
 - In US, over 20% pay for Tech News, Product Info and Lifestyles
 - In Europe, Sports is most paid for content
- Mobile Web is a continuation of PC Web – Consumers use the same brands and increase overall Web time