

A hand is shown with the index finger pointing towards a circular power button icon on a screen. The background is blurred, showing a person in a white shirt. The text 'GTI Telecoms 2007-08' is overlaid on the image.

GTI Telecoms 2007-08

*Understand the evolving landscape of local, regional
and global telecommunications with **TNS***

“The goal is to transform data into information, and information into insight”*

Robust data

Gathered through TNS offices



Strategic recommendations

From Global and Regional Managing Directors



Local insight

From local TNS Technology experts

GTI Telecoms 2007-08

- GTI Telecoms 2007-08 is the third of the TNS Technology GTI series, and the first to focus predominantly on telecommunications

**Total telecoms
market
understanding**

**Focus on the
mobile phone**

**Brand power in
mobile**

**Attitudes towards
convergence**

16,000 interviews aged 16-60

Fieldwork in November 2007

30 markets

**Global, regional and local market
reports**



**Total telecoms
market
understanding**

How are consumers engaging with telecoms?

**Usage of telecoms
services and products**

- Includes fixed line, mobile phone, VOIP, wired broadband, wireless broadband, PDA, wireless e-mail device etc.
- Current usage and expected future usage level
- Likelihood to adopt amongst non-users
- Profile of heavy users and future adopters

**Fixed-mobile substitution
and messaging-voice
substitution**

- In the work environment
- For personal use
- Profile of mobile dominant versus fixed dominant
- Profile of messaging dominant versus voice dominant

Use of social networking

- Awareness of sites
- Visitation of sites and sites with profiles up-loaded
- Profile of social networking users



Focus on the
mobile phone

What are the key trends in mobile phones?

Mobile ownership

- Ratio of owners, prospects and rejectors and profiles of each
- Ratio of new phone to secondhand phones
- Experience level with mobile phones

Mobile usage behaviour

- ARPU levels and profile of high value subscribers
- Usage of multiple phones and multiple networks, and why
- Pre-paid versus post-paid amongst owners and prospective subscribers
- Usage of mobile phones accessories

Mobile purchase behaviour

- Replacement cycles and profile of frequent replacers
- Sources of information – all sources versus the top ones
- Key imagery driving choice of mobile phones and networks
- Preferred form factor (e.g. clam, slider) for the next phone
- Cost of current phone and budget for future phone
- Purchase triggers
- Source of current phone and channel for future phone
- Likelihood of buying mobile phone accessories



Focus on the
mobile phone

What are the key trends in mobile phones?

Usage of 23 mobile features

Camera, video, digital music player, SMS, MMS, radio, games, e-mail, mobile Internet, GPS, mobile TV, PDA functionality, MS Office, WiFi, Bluetooth, 3G, touchscreen, additional memory, local language, video calling etc.

- Availability on their mobile phone
- Usage of the feature, and frequency of use
- Likelihood to own the feature amongst mobile prospects
- Features which drive the choice of their next mobile phone model
- Profile of feature users and future adopters

Usage of 16 mobile content applications

Downloading and side-loading music, downloading and side-loading TV/video content, downloading and side-loading games, downloading or side-loading graphics, downloading or side-loading ringtones, watching live TV, IM/chat, mobile wallet, location based services, blogging etc.

- Awareness of the content and usage incidence
- Current and future usage frequency amongst users
- Interest to adopt amongst non-users of the content
- Profile of content users and future adopters



Focus on the
mobile phone

What are the key trends in mobile phones?

Focus on mobile TV
(amongst users)

- Amount of time spent watching mobile TV in a week
- Occasions for watching mobile TV
- Types of programmes watched

Focus on mobile music
(amongst users)

- Amount of time spent listening to mobile music in a week
- Occasions for listening to mobile music

Focus on mobile Internet
(amongst users)

- Amount of time spent accessing the mobile Internet
- Work versus personal usage of the mobile Internet
- Types of websites visited



How competitive are mobile brands?

■ Optional analysis available on...

**Consumer profile for
Conversion Model
segments for brands**

**Likely switching traffic
between brands**

**Individual brand's
performance on different
brand attributes**

Brand perception mapping



Attitudes to convergence

How convergence-ready are consumers?

Current usage of dual, triple or quadruple-play packages

- fixed line telephony
- mobile phone service
- digital / pay TV
- broadband Internet

Desire for a triple-play or quadruple-play package

Preference for an all-in-one device versus multiple specialized devices

The key service within the four ICT services

Coverage & methodology

- 30 markets.
- Representative sampling of the population aged 16 to 60.
- SES cut-off in less developed markets to ensure we cover an 'addressable universe' for telecommunications products.
- Mobile owner booster of n=300 in developing markets to obtain a minimum of n=300 owners.
- On-line interviewing only in markets with national Internet penetration of 62% and above.

	Method	Sample	Strata
Asia			
China	F2F	n=800	Tier 1, 2, 3 - Shanghai, Beijing, Guangzho, Chengdu, Wuhan, Shenyang, Nanjing, Baoding, Weifang, Lanzhou
Japan	On-line	n=500	All urban
India	F2F	n=800	Major metros – Delhi, Mumbai, Kolkata, Chennai, Bangalore, Hyderabad
Korea	On-line	n=500	National
Indonesia	F2F	n=500	Major metros – Jakarta, Surabaya
Australia	On-line	n=500	National
Thailand	F2F	n=500	Major metros – Bangkok, Haadyai, Kongkaen, Chiangmai
Hong Kong	On-line	n=500	National
Taiwan	On-line	n=500	National
Vietnam	F2F	n=500	Major metros – Hanoi, Ho Chi Minh, Cantho, Danang
Europe			
Germany	CATI	n=500	National
UK	On-line	n=500	National
Italy	CATI	n=500	National
France	CATI	n=500	National
Spain	CATI	n=500	National
Russia	F2F	n=500	Major metros – Moscow, St. Petersburg
Netherlands	On-line	n=500	National
Sweden	On-line	n=500	National
Middle East and Africa			
Egypt	F2F	n=500	Major metros – Cairo, Alexandria
Saudi Arabia	F2F	n=500	Major metros - Jeddah, Riyadh, Dammam
South Africa	F2F	n=500	Major metros - Cape Town, Gauteng, Durban, Port Elizabeth, Bloemfontein, East London
Morocco	F2F	n=500	Major metros – Casablanca, Rabat, Marakesh
Algeria	F2F	n=500	Major metros – Algiers, Setif, Oran
Kuwait	F2F	n=500	Major metros - Kuwait capital, Hawalli, Al Farwaniya, Al Ahmadi, Mubarak Al Kabeer, Al Jahra
UAE	F2F	n=500	National - Dubai, Abu Dhabi, Sharjah
Latin America			
Brazil	F2F	n=800	Major metros – Sao Paulo, Rio de Jenairo, Salvador
Mexico	F2F	n=500	Major metros – Mexico City, Guadalajara, Monterray
Argentina	CATI	n=500	Major metros – B Aires, Cordoba, Rosario, Mendoza, Tucuman
North America			
USA	On-line	n=1000	National
Canada	On-line	n=500	National

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GTI Telecoms 2007-08

Global Report

*Understand the evolving landscape of local, regional
and global telecommunications with **TNS***

Contents

- Introduction
- Executive Summary
- A – Getting to know our 16-60 year old consumers
- B – Usage of ICT
 - By region
 - By consumer segment
- C – Mobile telephony in depth
 - Ownership of mobile
 - Mobile usage behaviour
 - Mobile purchase behaviour
 - Mobile choice criteria
- D – Mobile content and Services
 - Highlights of mobile contents and applications
 - 1. Mobile Music
 - 2. Mobile Imaging
 - 3. Mobile Gaming
 - 4. Mobile Internet
 - 5. Mobile TV/Video
 - 6. Non voice communication
 - E – Mobile content and Services (Contd.)
 - 7. Business application
 - 8. Connectivity
 - 9. Mobile Wallet
 - 10. Subscribed information services
 - 11. Non standard applications
 - 12. Other content downloads
- F – Brand Power
 - Highlights on Brand Power
- G – Attitudes towards convergence
 - Preference for ‘all-in-one’ devices
 - Usage and desire for multi-play packages
- H – Substitution across available technologies
 - Voice – between mobile & fixed line
 - Messaging – between emails, SMS, MMS & IM
- Appendix
 - A – Terminology and definition
 - B – Questionnaire wording and brand netting