

Mobile Life

Global Telecoms Insights



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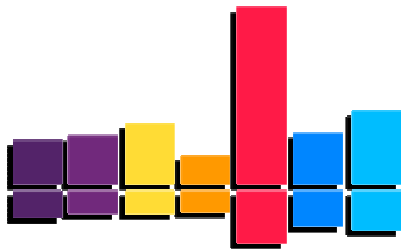
An Introduction to GTI
Key details for GTI 2011

GTI combines global coverage and a holistic view on mobile life in order to inform decision making



1. Global Coverage:

Mobile Life: GTI 2011 covers 42 markets across the globe and has expanded significantly into Africa in 2011



2. Holistic Content:

The study is the result of over 25,000 hours of interviewing with over 34,000 respondents in 42 markets across the globe. It is designed to provide a complete understanding of the end-to-end consumer experience with mobility today, and how this will change tomorrow



3. That informs decision making across 4 key areas:

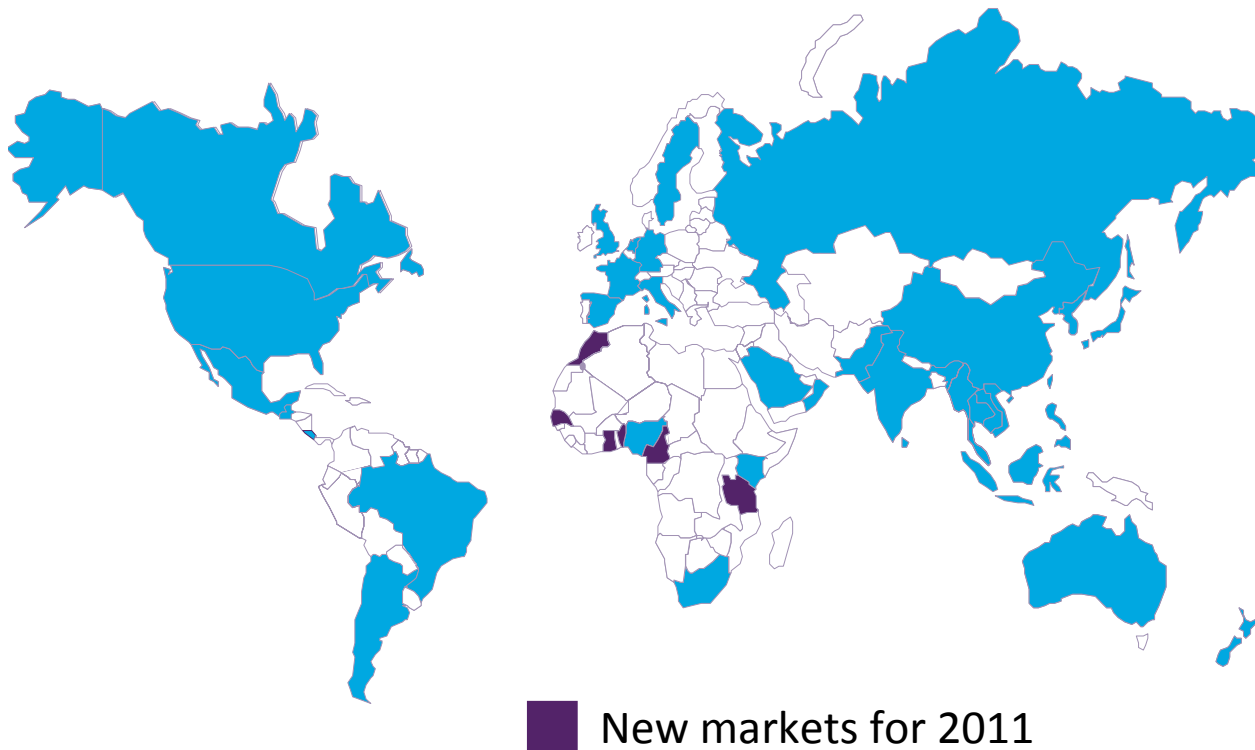




1. Global Coverage:

Now into it's sixth year, coverage has expanded significantly in Africa

42 markets; 34,000 respondents



Regions covered:

•**North America:** USA, Canada

•**Europe:** UK, France, Germany, Spain, Italy, Netherlands, Sweden, Russia

•**Developed Asia:** Australia, Hong Kong, Japan, South Korea, Malaysia, New Zealand, Singapore, Taiwan

•**China:** China only

•**India:** India only

•**Emerging Asia:** Indonesia, Pakistan, Philippines, Thailand, Vietnam

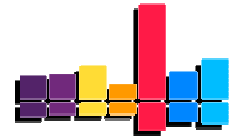
•**Latin America:** Argentina, Brazil, Chile, Guatemala & Cost Rica, Mexico

•**Middle-East & North Africa:** Morocco, Saudi Arabia, UAE

•**Sub-Saharan Africa:** Benin, Cameroon, Ghana, Kenya, Nigeria, Senegal, South Africa, Tanzania, Uganda

2. Holistic Content:

The study contains detailed information across a multitude of topic areas



3. Decision making

GTI plays a strategic planning role in organisations



Critical new insights for 2011

What role will tablets play in consumer device interplay?

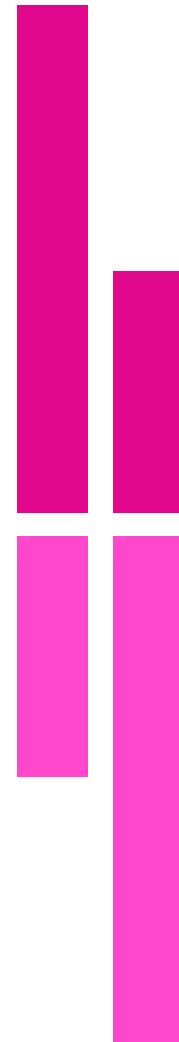
Where are mobile content brands capturing brand equity from in the ecosystem?

Which niche products and services are best positioned for future growth?

What role does the Operating System play in consumer decision making?

Which digital behaviours will make the quickest transition into the mobile world?

Deep dives into mobile finance and social networking





Key details for GTI 2011

Methodology:

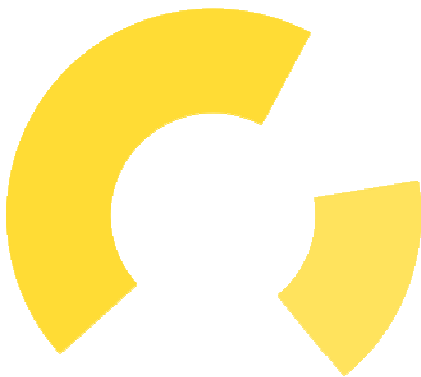
Designed to give accurate comparisons across markets

Representative sampling of the population aged 16 to 60

Mobile phone owners and non-owners

Larger sample sizes to provide granularity in key markets (key: market in **bold** = booster sample applied)

Interviewing took place between November 2010 – January 2011



Country	Methodology	Sample	Country	Methodology	Sample
Argentina	Online / F2F	455	Morocco	F2F	500
Australia	Online	502	Netherlands	Online	512
Benin	F2F	606	New Zealand	Online	501
Brazil	F2F - CLT	1913	Nigeria	F2F	1615
Cameroon	F2F	610	Pakistan	F2F	500
Canada	Online	1013	Philippines	F2F	575
Chile	F2F	429	Russia	F2F - CLT	501
China	F2F	2400	South Africa	F2F	500
France	Online	502	Saudi Arabia	F2F	514
Germany	Online	496	Senegal	F2F	500
Ghana	F2F	812	Singapore	Online	500
Guatemala & Costa Rica	F2F	1015	Spain	Online	517
Hong Kong	Online	501	Sweden	Online	501
India	F2F	5500	Taiwan	Online	502
Indonesia	F2F	1500	Tanzania	F2F	500
Italy	Online	500	Thailand	F2F	500
Japan	Online	500	UAE	F2F	502
Kenya	F2F	700	Uganda	F2F	500
Korea	Online	500	UK	Online	501
Malaysia	Online	518	USA	Online	1506
Mexico	F2F	532	Vietnam	F2F	575

Content:

The study contains detailed information across a multitude of topic areas

Market understanding

- Consumer profiling across markets
- Source of purchases
- Touchpoint evaluation
- Purchase triggers
- Payment plans
- Drivers of purchase
- Spend

Usage

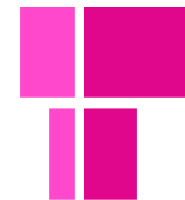
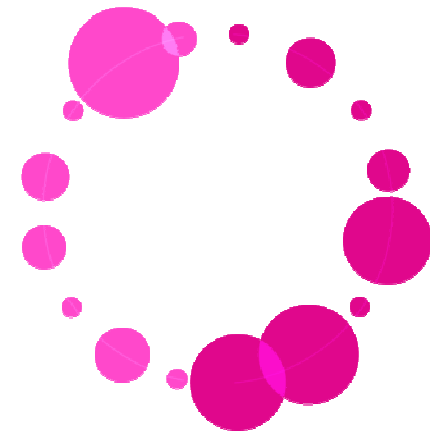
- Feature and service use, frequency of use, future demand
- Deep dives into social and financial services
- Financial and social networking deep dives
- Network and handset brand used
- Future growth potential

Brand

- Understanding of brand value across entire mobile ecosystem
- Brand commitment measurement
- Brand preference
- Openness to competitor brands
- Brand awareness and profiling
- Brand collaboration opportunities

Convergence

- Usage and desire for multi-play
- Digital segmentation
- Interplay of messaging services
- Drivers of tablet purchase
- Mobile vs. laptop vs. tablet
- Ownership of technology services and devices



Deliverables and pricing:

Package outputs are available, but please speak to us about customised options

Deliverable	Description	Price for package (USD)	Price for individual deliverables (USD)
Global package	Global report – c.70 slides with country-level data in appendix	\$90K	\$10K
	Global data tables – one set with regional and country break, one set with demographic and consumer group breaks		\$40K
	iClick online reporting system – allows data to be cut simply and charts to be produced in an online tool		\$40K
	SPSS file – for more detailed data interrogation		\$50K
	Presentation – bespoke to your needs		\$10K
	Analysis – 10 hours of consultancy time for any purpose		Local costing
Local package	Local report – c. 70 slides	\$6-15K depending on market chosen	30% of price
	Local data tables – one set comparing local results to regional and global numbers, as well as demographic and consumer breaks		70% of price

All data and deliverables are owned by TNS and may be shared internally by the purchasing client. The study information may not be released into the public domain or shared with other agencies or third parties without the written permission of TNS.

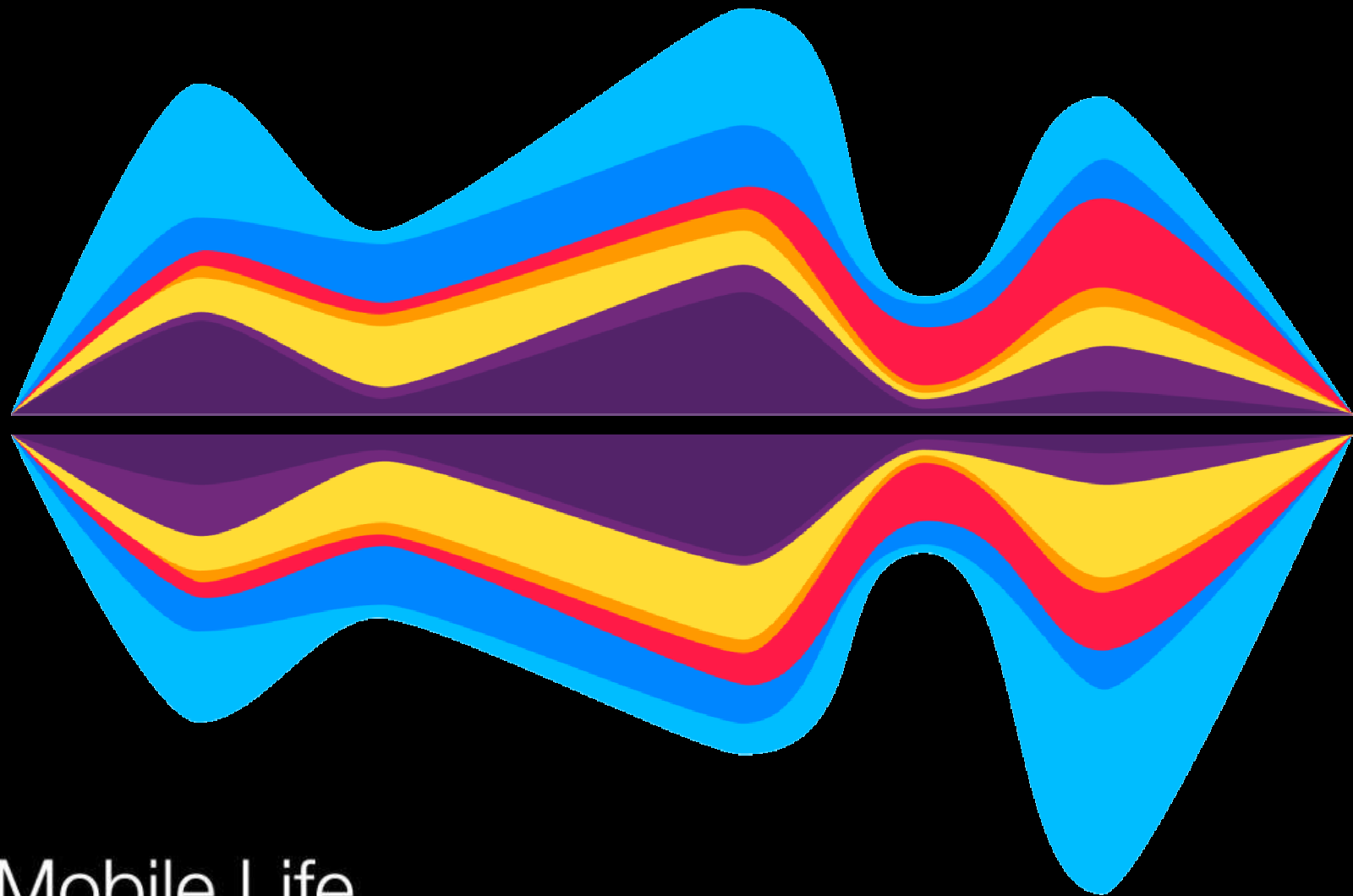
TNS reserves the right to publish up to 10% of the information in this study.



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