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**

**Carly Fiorina (Executive and president of Hewlett-Packard Co. in 1999. Chairwoman in 2000)*

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

Released on 31st December 2007

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

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Focus on the mobile phone

What are the key trends in mobile phones?

Mobile ownership

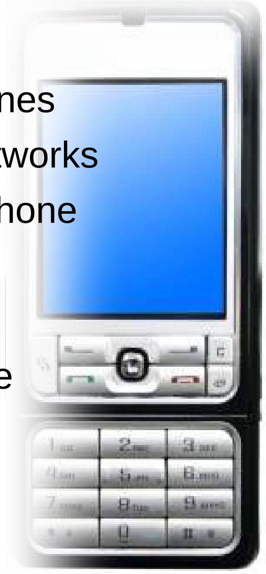
- Ratio of owners, prospects and rejectors and profiles of each
- Ratio of new phone to secondhand phones
- Experience level with mobile phones

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



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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

Brand power in mobile

How competitive are mobile brands?

Market share and consideration of mobile phone and network brands

- Overall
- Amongst key target segments (e.g. youth, high ARPU, high budget holders)

Conversion Model™ Commitment and Availability segments

- Segment sizes
- Mapping of Commitment and Availability to brands in a competitive context
- Brand attributes which drive commitment and availability to brands

Needs Fit

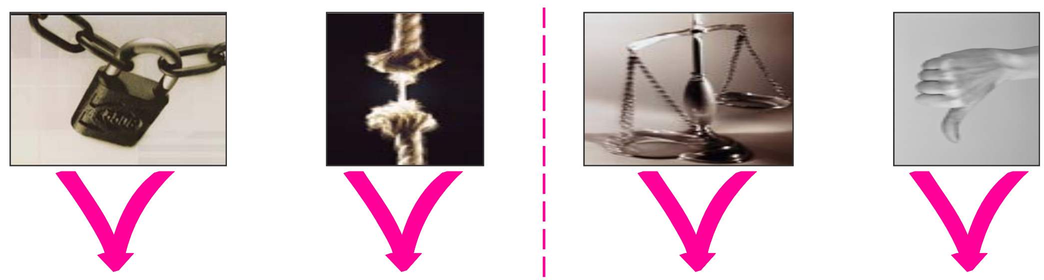
Involvement

Attitude to alternatives

Ambivalence

USERS				NON-USERS			
Entrenched	Average	Shallow	Convertible	Available	Ambivalent	Strongly Unavailable	Weakly Unavailable

The eight segments can be further grouped into four primary segments…



Committed Users	Uncommitted Users	Open Non-Users	Unavailable Non-Users

Brand power in mobile

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

GTI Telecoms 2007-08 Price List

Pricing List for Multinationals (companies operating in more than 2 countries)	
Global GTI Report	US$38,000
Individual Country Reports^	US$8,000
Complete Table Set* – Global and Country Level	US$10,000
Complete Table Set** – Single country	US$3,000

^ Report will be ready 2 weeks after purchase. Tables will be ready within 2 days.

** Only available with purchase of Global GTI report*

***Only available with purchase of the Country Report*

Pricing List for Companies Operating in 1 to 2 countries	
Global GTI Report	US$12,000
Individual Country Reports^	US$7,000
Complete Table Set* – Global and Country Level	US$5,000
Complete Table Set** – Country Level	US$2,000

^ Report will be ready 2 weeks after purchase. Tables will be ready within 2 days.

** Only available with purchase of Global GTI report*

***Only available with purchase of the Country Report*

The typical investment for a global customized study with the same specifications is over US$800,000.

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GTI 2007-08 Global Report

Executive summaries

- Key strategic findings
- Tailored recommendations

Detailed analysis

- Individual markets and regions
- Demographics; age, gender, occupation and different lifestyle parameters
- Technology usage segments; high mobile ARPU customers, heavy mobile applications users, business users, Smartphone users etc.

PowerPoint format

- Approximately 300 slide Main Report
- Approximately 300 slide Appendix

"Youth & Future Influencers Report" + "GTI 2006 Report"

Free for purchasers confirming >US$30k in 2007

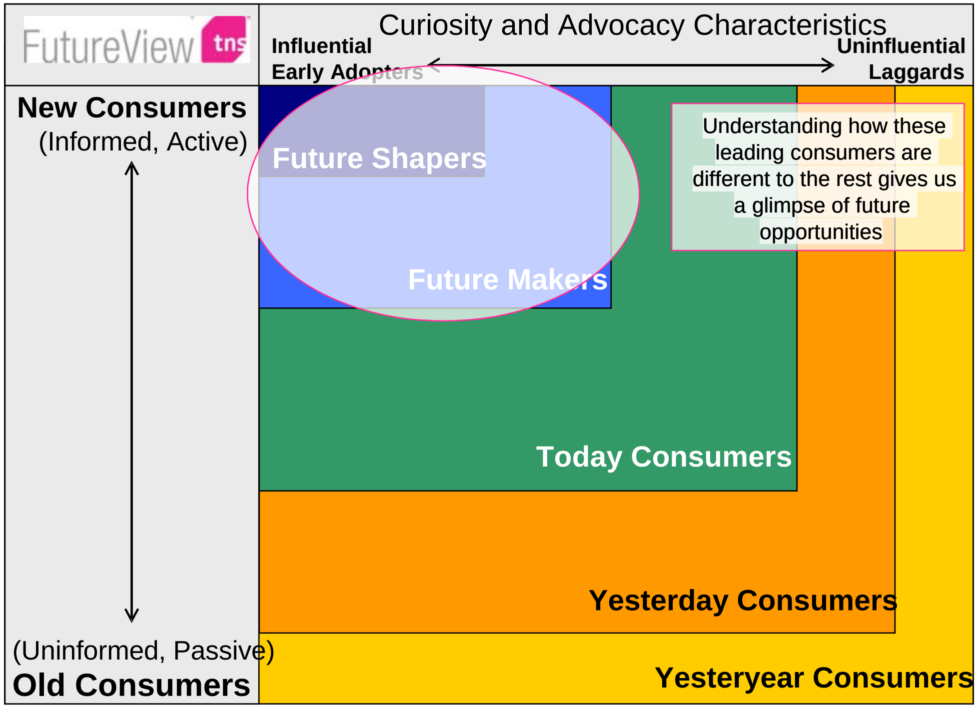
- An examination into the NPD, brand and channel opportunities for two critical consumer segments; **Age group 16-21** and **Future Influencers**

Those classified as Future Influencers are…

- Drivers of **product adoption**
- Essential to long-term **brand survival**
- **Profitable**

- **Curious** and value new ideas
- **Advocates** of new ideas
- **Involved** in brands **long-term**

Standard selling price for the Youth and Future Influencers™ Report is US$18,000



Stipulations

- This report is sold under a limited company-wide license to the subscriber.
  - Subscribers may share the report with all company branches and international offices, subject to having a global license.
  - Subscribers may not share any part of the report with any party outside of their company, including joint venture partners, consultants, agencies and affiliated companies.
  - Reports will be provided in electronic format only.

- TNS reserves the right to publicize up to 10% of the report findings for marketing and public relations purposes.
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