YouGov® What the world thinks

PREPAID EXPO EUROPE

John Gilbert
Consulting Director Technology/Telecoms
john.gilbert@yougov.com

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YouGov helps companies get closer to their customers

Key facts

- Founded in 2000
- Global revenues of >£60M
- 500+ employees
- International presence in Europe, US, and Middle East

Consultancy clients

Specialities

- Brand tracking
- U&A studies
- Niche samples
- Qualitative
- Customer satisfaction
- Multi country
- Syndicated trackers
- Speed/efficiency

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Our Tech/Tel syndicated studies

DongleTrack , a survey of 2,000 mobile broadband users every quarter as well as 2,000 Nat rep. A multi-client, satisfaction, usage and attitude study. (*since 2008*)

The **Smartphone, Mobile Internet, eXperience (SMIX)** – 2,000 smartphone owners and 2,000 Nat rep, looking at handsets, mobile operators, renewal, churn, operating systems, apps and more. (*since 2009*)

iPhone iTrack , 1,000 iPhone users every 6 months. Research shows that the Apple brand can over inflate satisfaction, usage and attitudinal behaviour with a particular network operator. iPhone iTrack looks to measure and understand behaviour of iPhone owners to ultimately answer the question... Which network operator is better and why? (*since 2011*)

Tablet Track, an in depth quarterly study into the tablet and e-reader market. Set up to capture existing tablets and their owners as well as new entrants to the market. Over 1,300 tablet owners and 2,000 Nat rep. Reporting on U&A, satisfaction, take up of 3G devices, operator choice, etc. What will prospects do, who do these devices attract? (*since 2010*)

Mobile wallet, newly launched tracker surveying 2,500 respondents (2,000 Nat rep, as well as specialist sample of users of wave & pay cards and NFC enabled handsets). Reporting on attitudes to mobile wallet, barriers to take up. Who are the most likely consumers to embrace the technology and why? (*since 2011*)

Smart TV - A syndicated quarterly tracking service, delivering data and insights on the shifting state of the Smart/Connected TV market. Starting in Q1 2012 covering UK,US, France and Germany. Coverage to be expanded during 2012. 1,000 Smart TV owners and 2,000 Nat Rep.

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Lots of Hype…

BARCLAYS

PayTags

NFC

Mobile Payments

Mobile Wallet

Contactless Cards

Pingit

Boots

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But…

The UK Market – key facts

Contactless cards

(Since 2008)

Awareness?
55%

Acknowledge Possession?
16%

Usage?
31%

(Only 8% up to twice/week)

PayTags

(Since 2012)

Awareness?
3%

Interest?
17%

Likely to Use?
6%

Mobile Wallet

(Since 2011)

Awareness?
33%

Interest in Concept?
18%

Interest in Using?
12%

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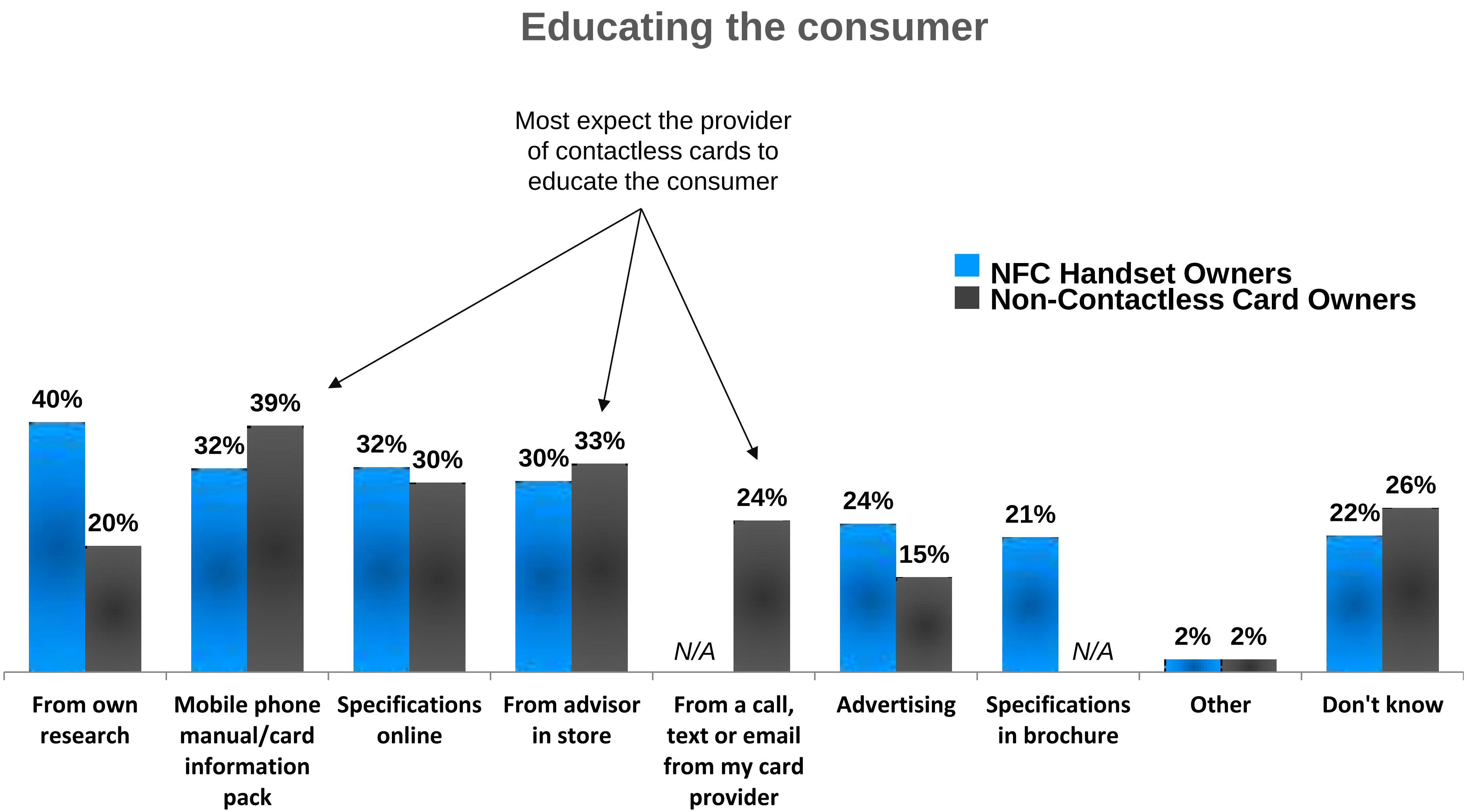
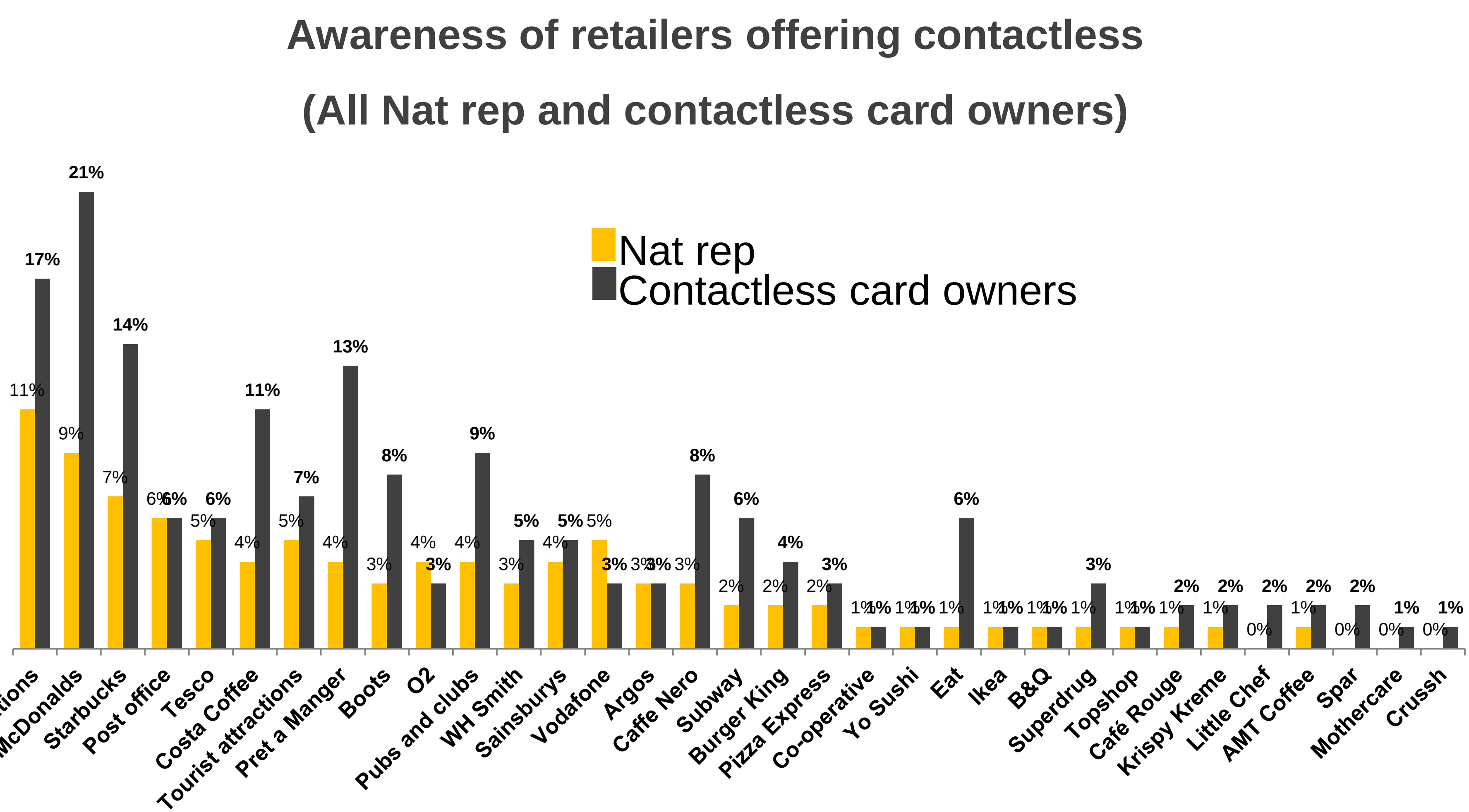
Consumers may require more proactive education from their providers



Base: All NFC enabled handsets owners (303) Base: All Nat rep respondents that don't own contactless card (1763)

Retail: Universal awareness (or adoption) has yet to hit the UK market but owners are more correctly aware.



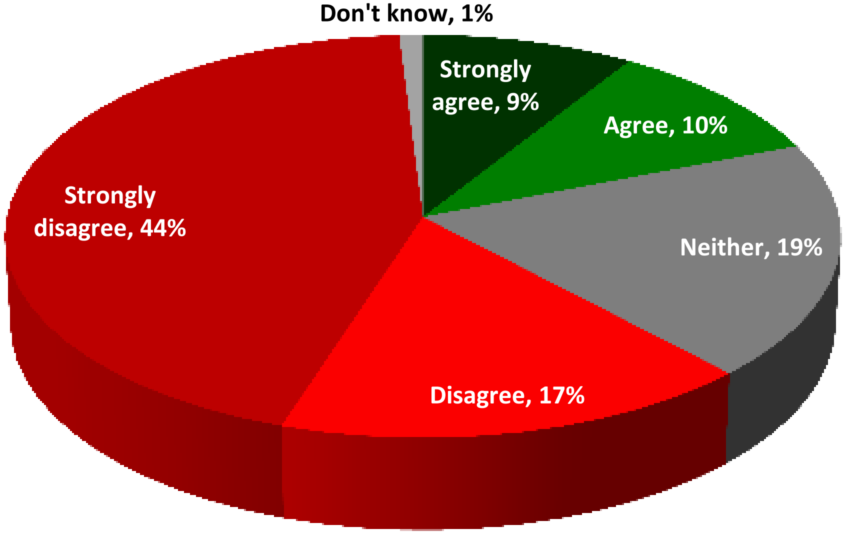
Of those that own an NFC enabled handset, most are undecided if they will use their handset to make payments in the future… more needs to be done to educate.

"I made a conscious decision to purchase a phone which had NFC or contactless payment capabilities"

(All that have NFC enabled handset)

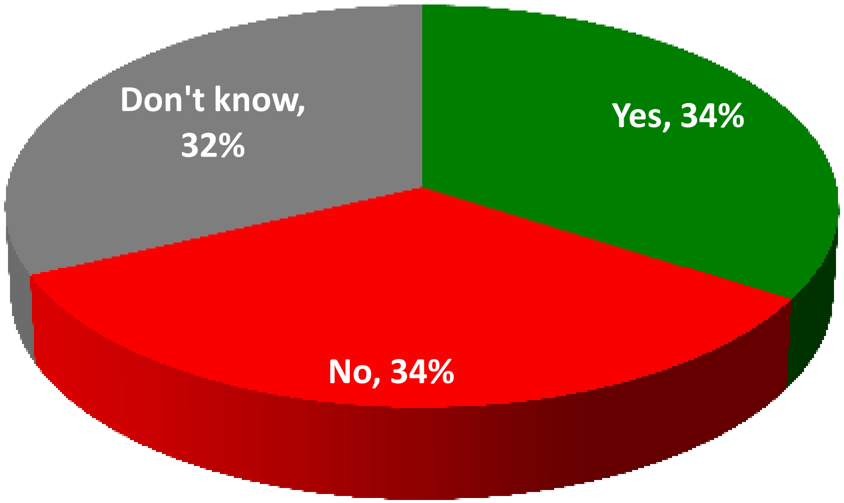
Net Disagree 61%

Net Agree 19%



Expect to use NFC on handset in next 12 months

(All that have NFC enabled handset)



Base: All NFC aware that handset has NFC (139)

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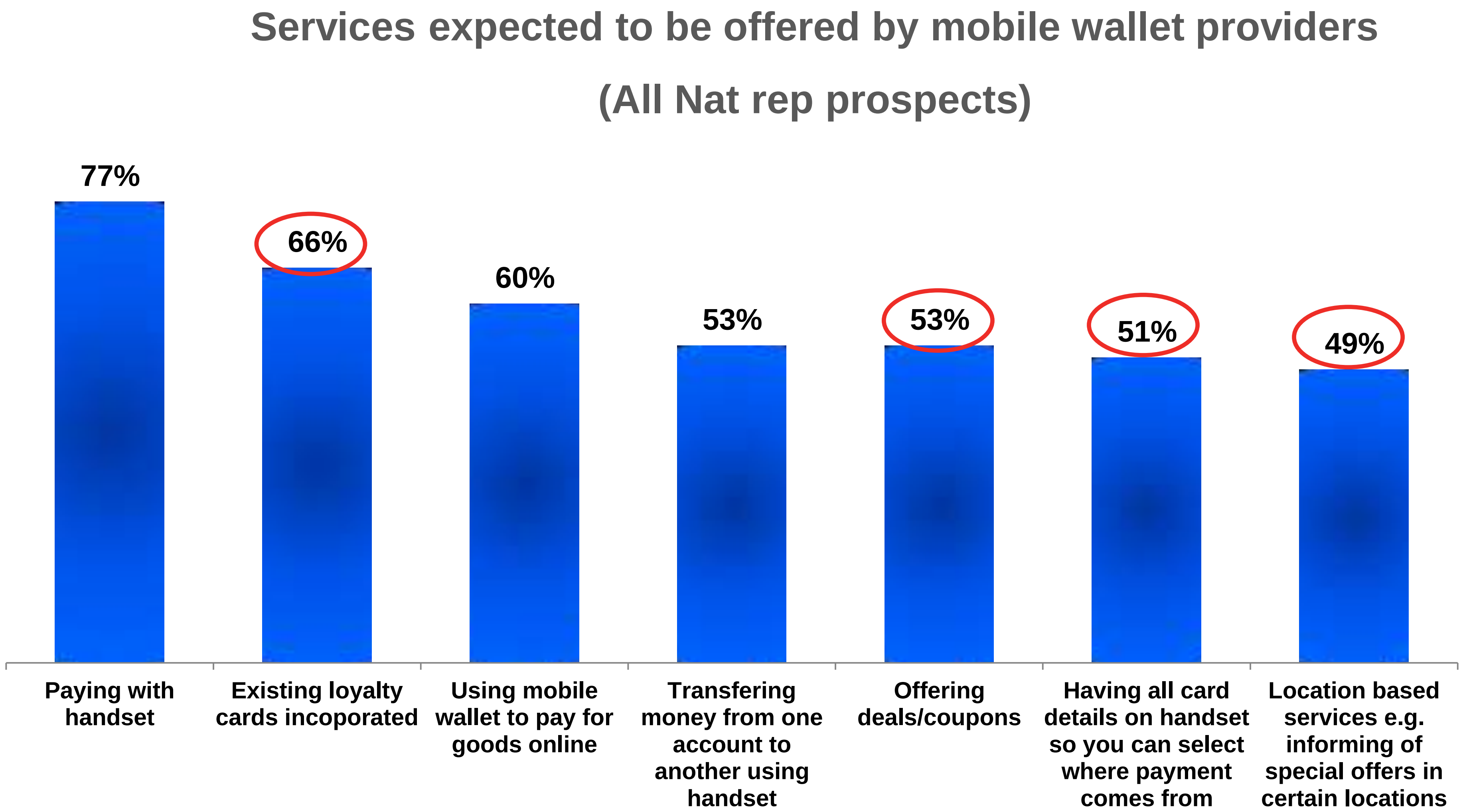
Aside from payments, marcoms need to focus on *WIIFM*.



Base: All Nat rep prospects (249)

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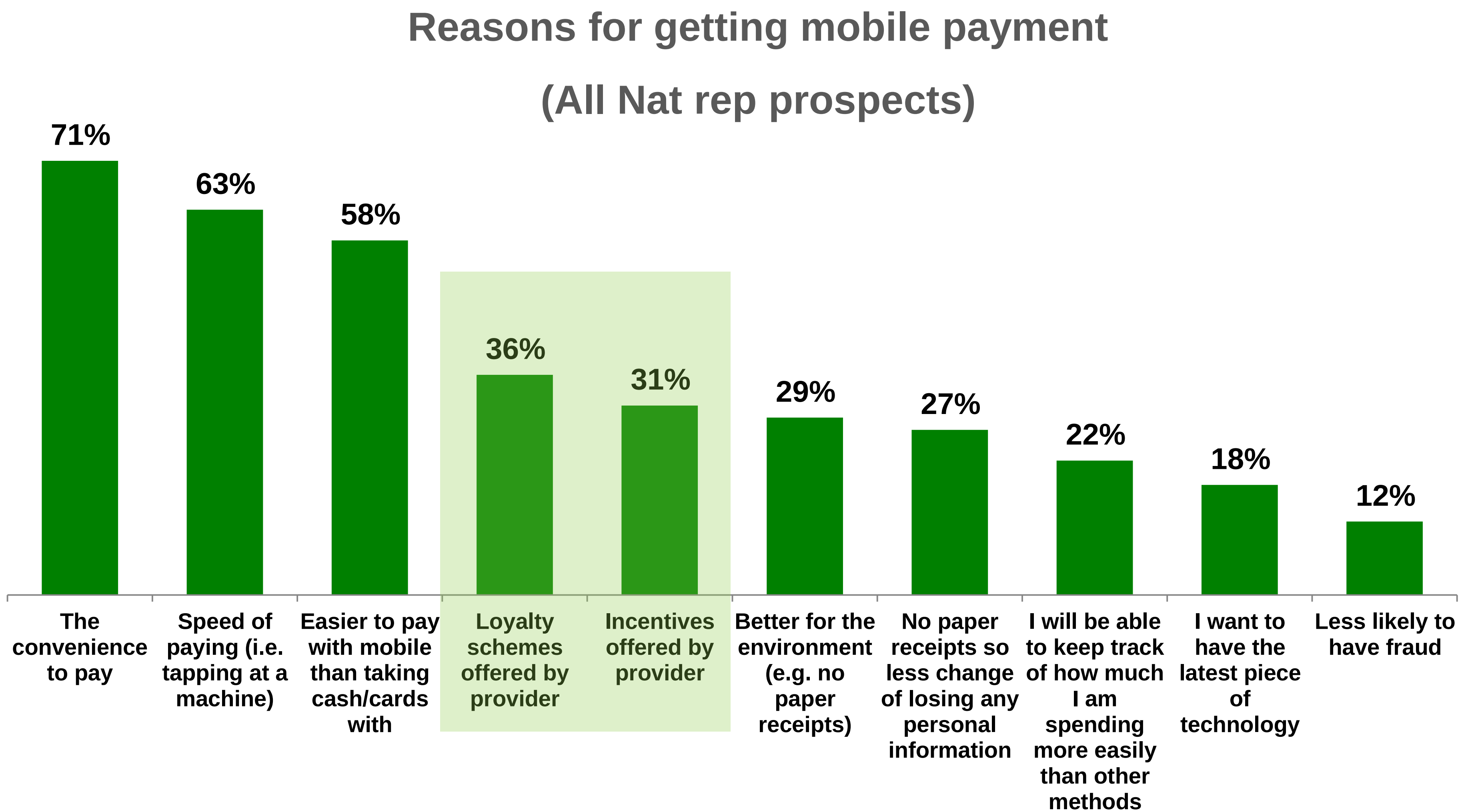
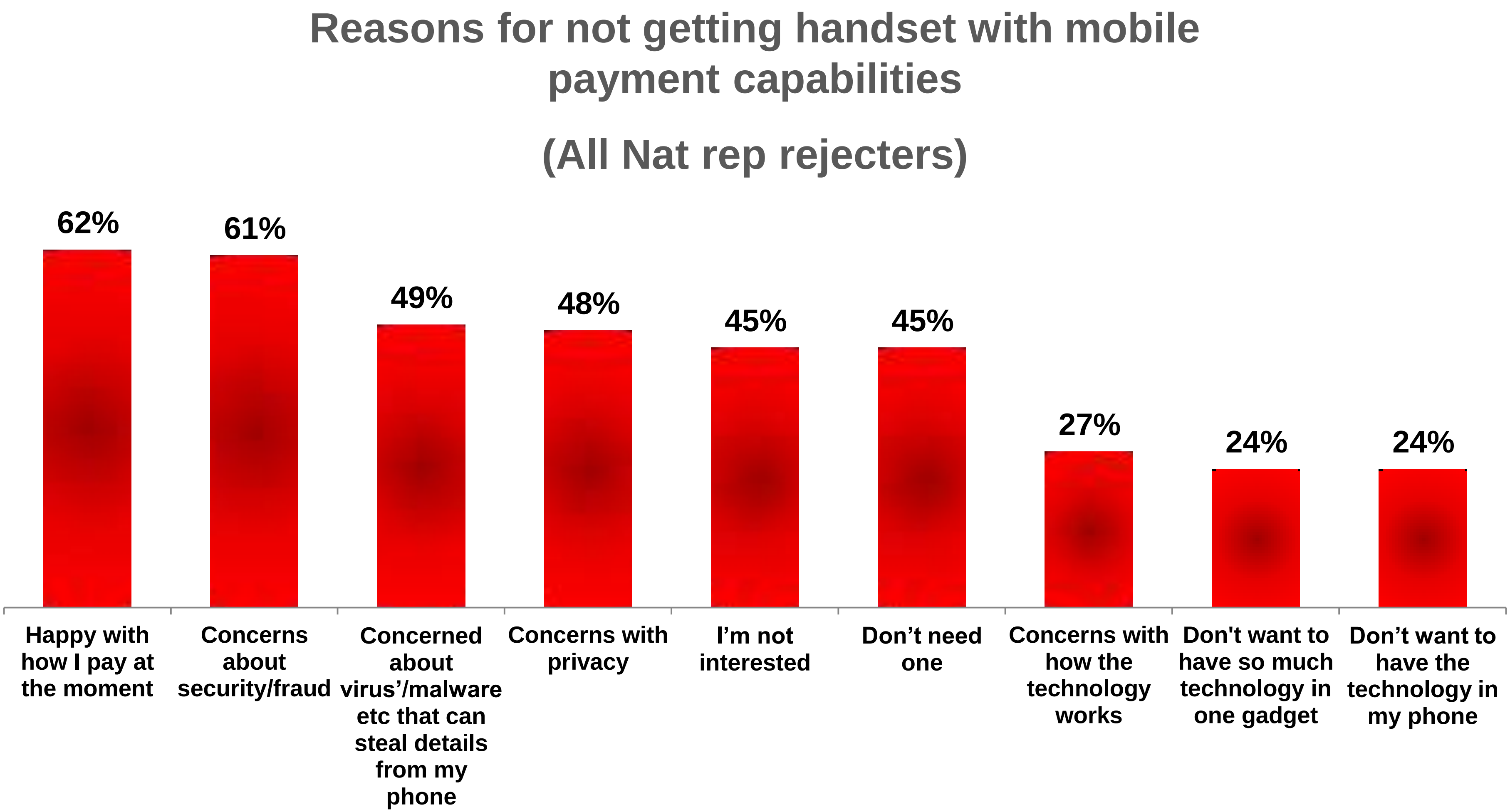
It's always about speed and convenience but what is the other WIIFM?



Base: All qualified Nat rep respondents that will get NFC (249)

Barriers for rejecters are 'soft' and can be overcome with the correct messaging



Base: All qualified Nat rep respondents that will not get a handset with NFC (1365)

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In short…Gathering pace but prone to stalling

- ✓ Increased media attention
- ✓ Developments by Barclays, Visa, MasterCard, O2
- ✓ London 2012 did not increase appetite
- ✓ Slow to filter to average consumer
- ✓ Confusion on who is in-charge
- ✓ Drive adoption through educating the consumer and addressing “WIIFM”

Carriers?

Financial Institutions?

Regulatory?

? ?

Handsets?

Retail?

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Questions?

John Gilbert
Consulting Director, Technology/Telecoms

John.Gilbert@yougov.com

Russell Feldman
Associate Director, Technology/Telecoms

Russell.Feldman@yougov.com

Simon Mottram
Consulting Director, Financial Services

Simon.Mottram@yougov.com