

Growth of Mobile Handsets and the Impact on Content and App Delivery



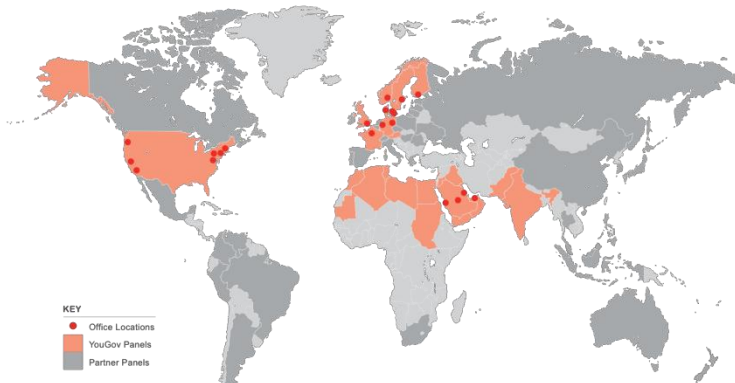
29th January 2013



About YouGov

Key facts

- Founded in 2000 (public 2005)
- Global revenues of c.£60ml
- 500+ employees
- International presence in Europe, US, and Middle East



Online panels = 2,000,000
Over 7,000,000 surveys annually

YouGov Products/Services

YouGov **BrandIndex**

YouGov **Omnibus** YouGov **SoMA**

YouGov **SixthSense**

YouGov Consulting

- Brand tracking
- U&A studies
- Niche samples
- Qualitative
- Customer satisfaction
- Multi-country
- Advanced analysis
- Syndicated trackers



John Gilbert
Consulting Director



Russell Feldman
Associate Director

On-going Tracking Programmes



Smartphone, Mobile Internet, eXperience (SMIX) –

- 2,000 smartphone owners and 2,000 Nat rep
- (quarterly *since 2009*)



Tablet Track

- Over 1,300 tablet owners and 2,000 Nat rep.
- (quarterly *since 2010*)



iPhone iTrack

- 1,500 iPhone users every 6 months.
- (semi-annual *since 2011*)



Apple new iPhone NPL

- 3 waves with 1,000 Nat Rep each; booster samples of iPhone users
- **(Fall 2012)**



Current State of the UK Mobile Community



Apps and Content

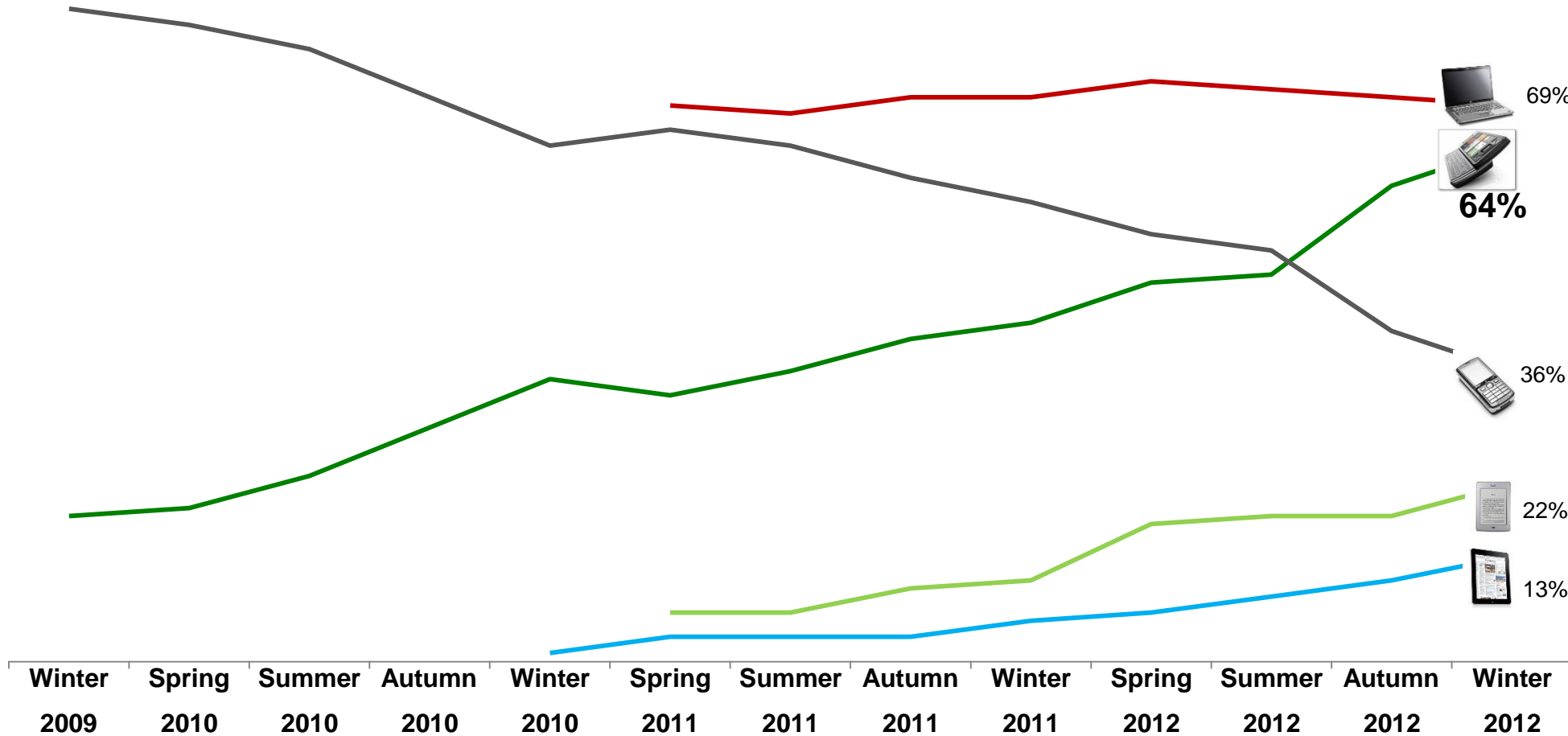


Future Implications



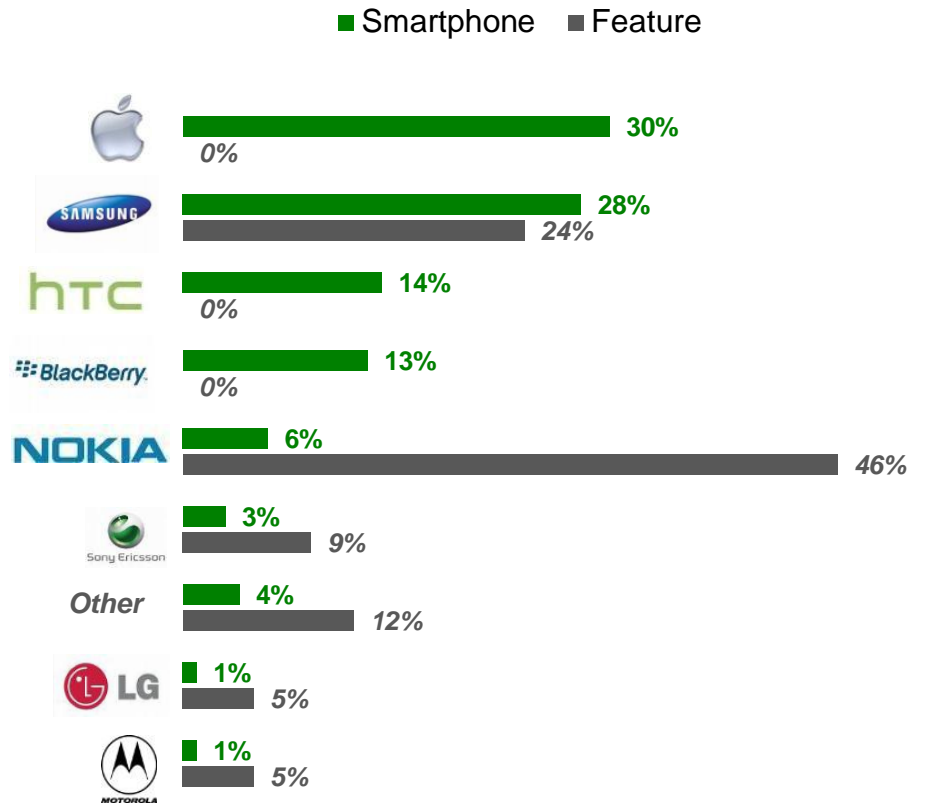
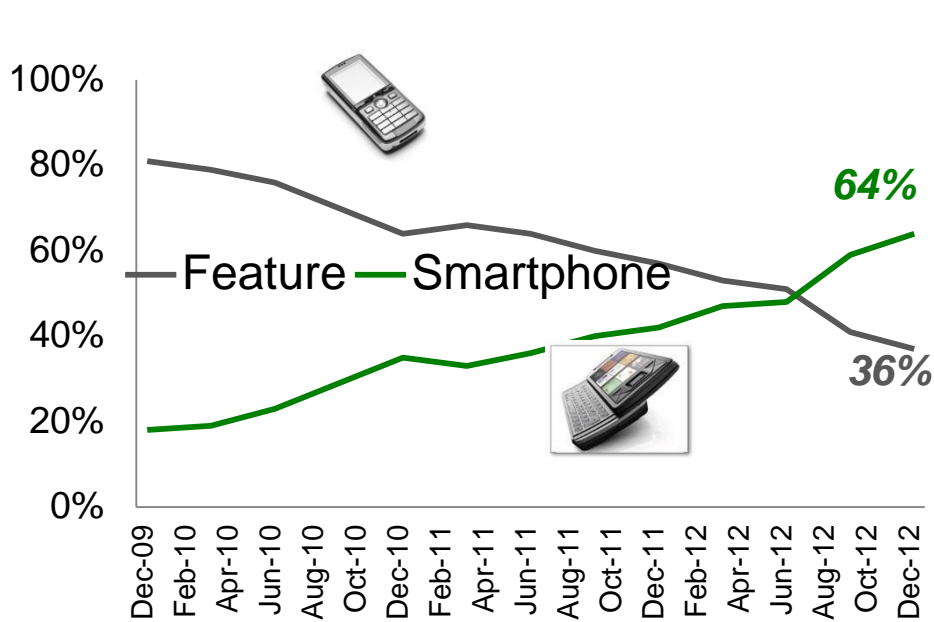
Penetration of devices over time (Individual ownership)

— Smartphone — Feature phone — Tablet — eReader — Laptop



Smartphones taking charge in the UK

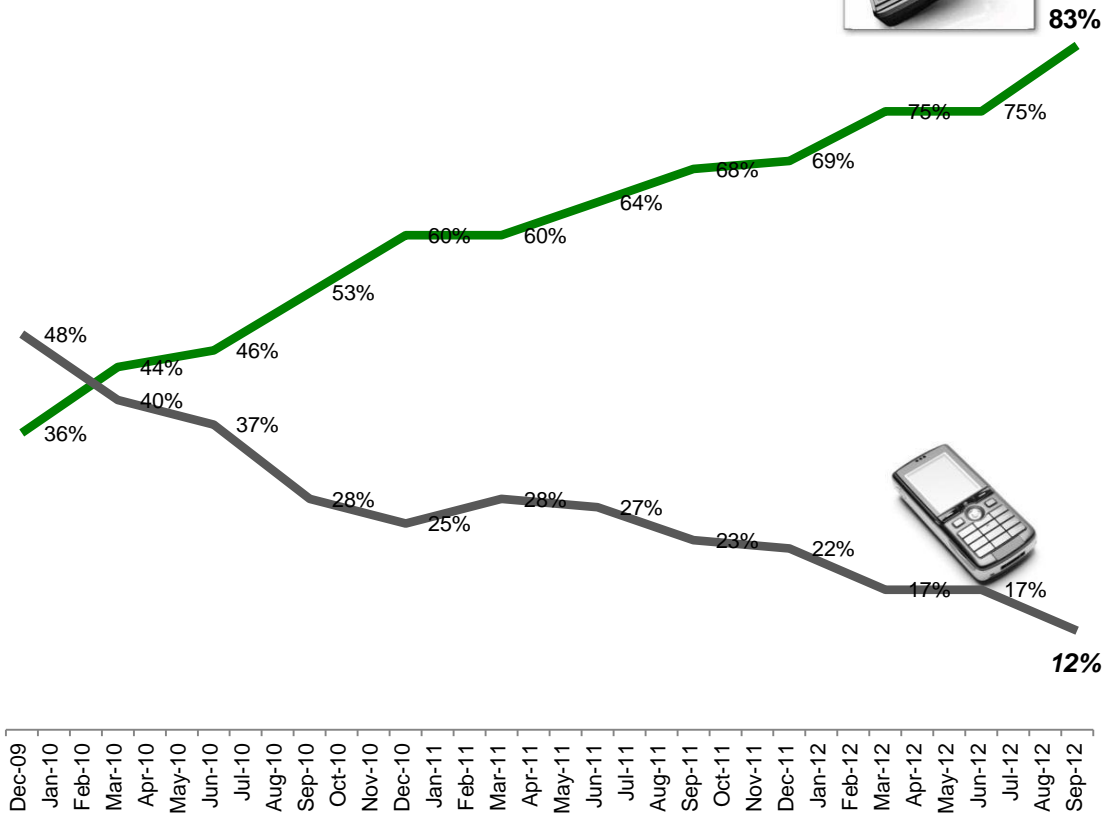
Samsung gaining ground on Apple in Smartphone market



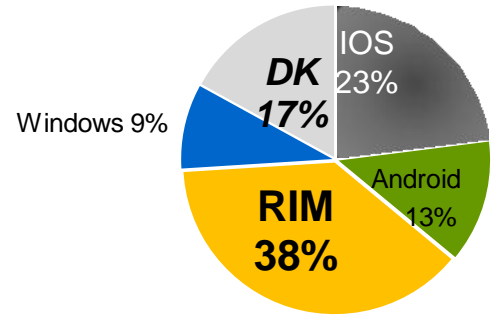
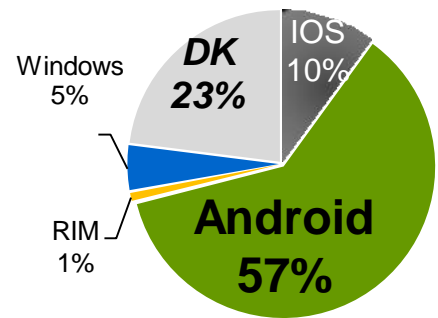
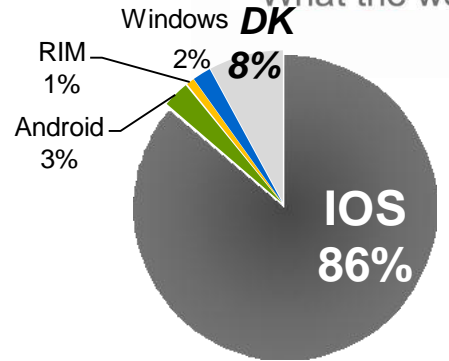
Future handsets and OS

Future handset type (Nat rep)

99% of all smartphone owners expect to get a smartphone again

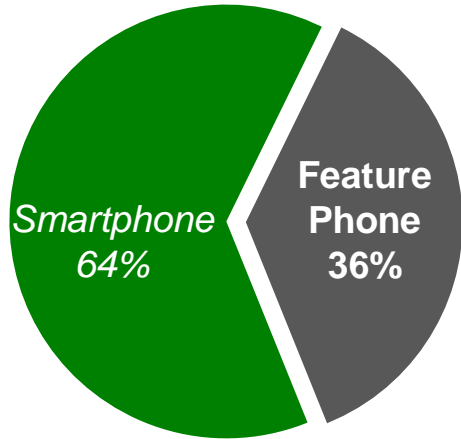


Future operating system (By current OS)



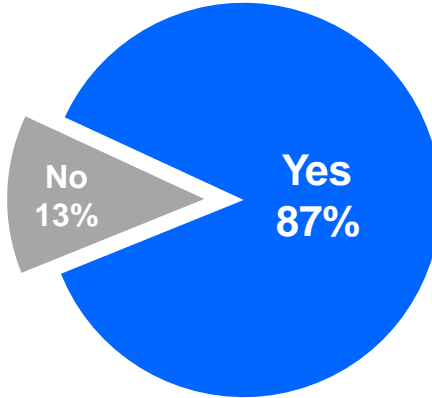
Feature Phone Conversion (December '12)

Current Phone?



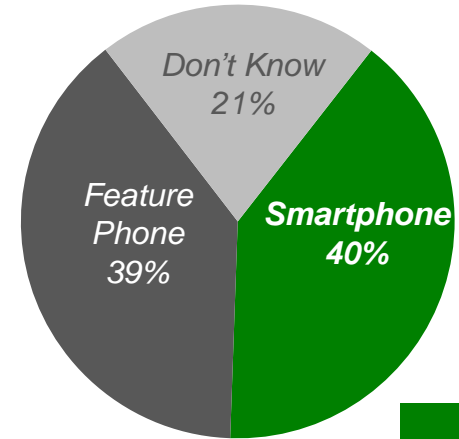
N = 4,170

Switching Phone?



N = 1,485

Type of Phone?

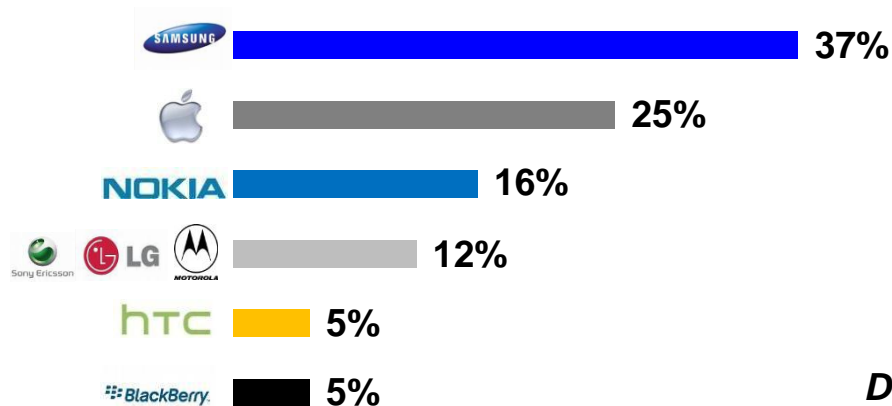


N = 542

35% Conversion

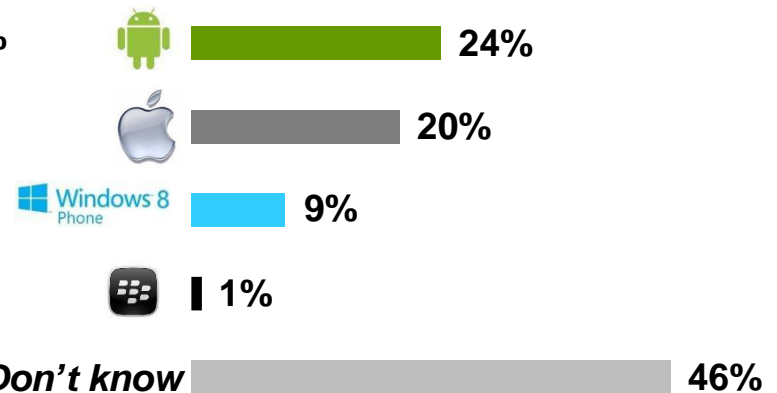
Over 30% of Smartphone owners also own a tablet

Smartphone Brand?



N = 216

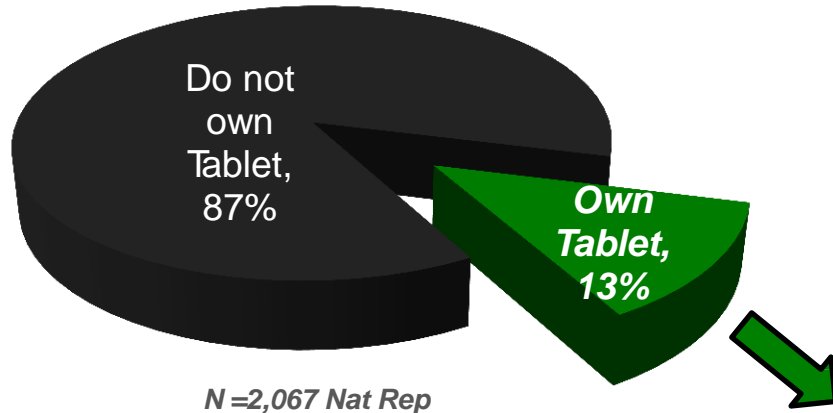
Smartphone OS?



N = 216

But what about tablets??

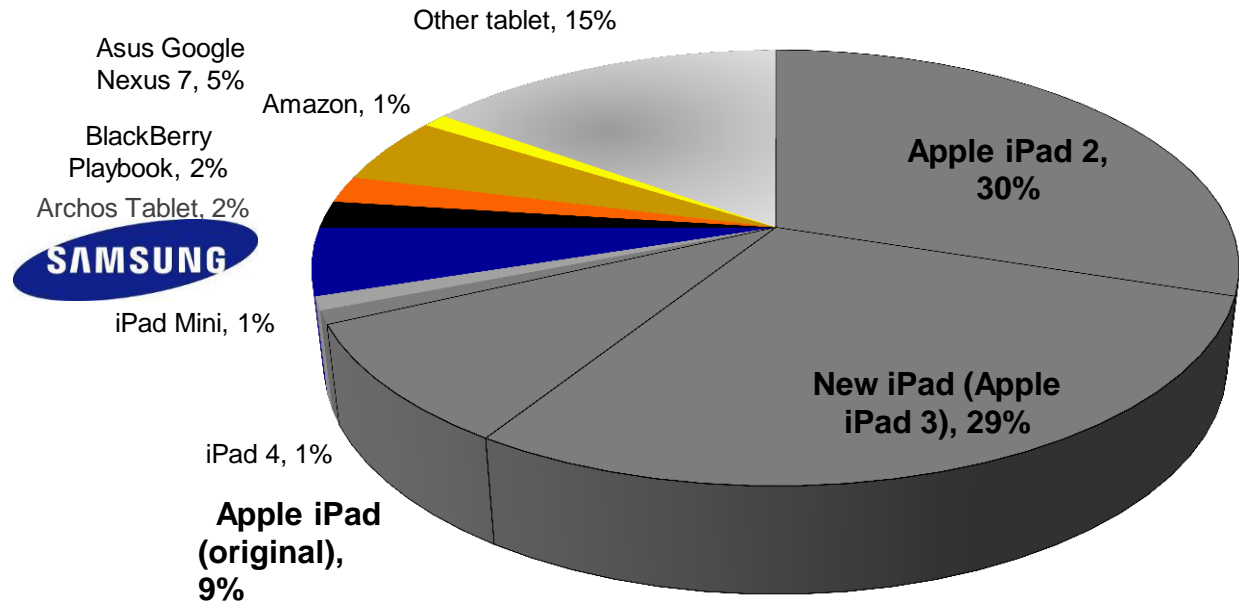
(November 2012)



N=2,067 Nat Rep



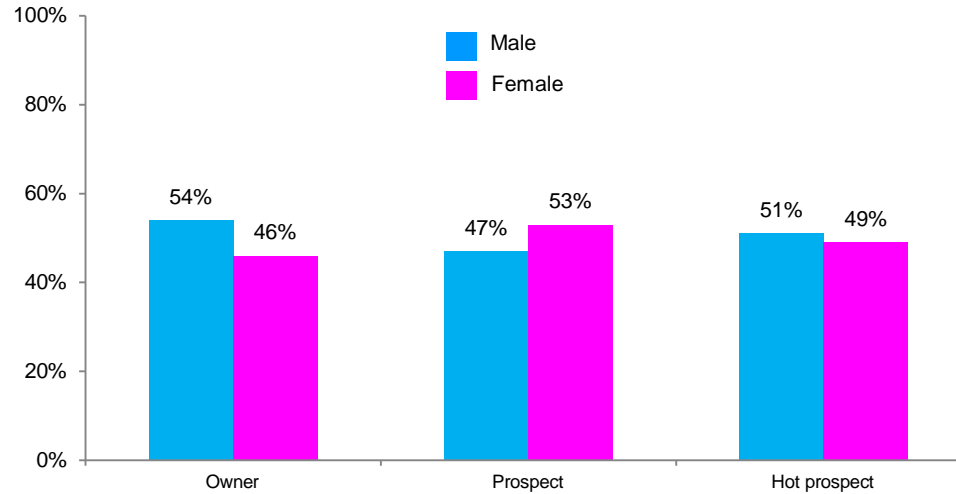
69% BUT...
has been falling over
past 2 quarters



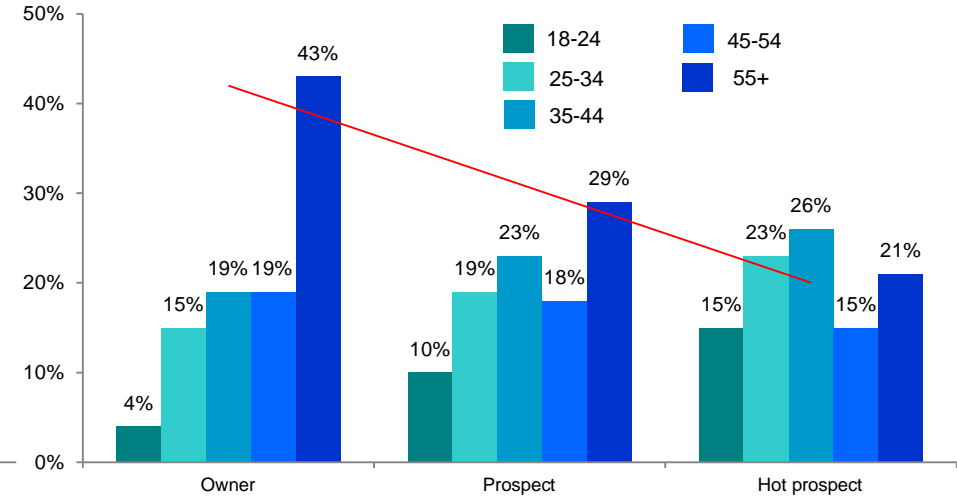
N=1,832 (including booster)

Demographics show a shift in age amongst Tablet prospects and owners

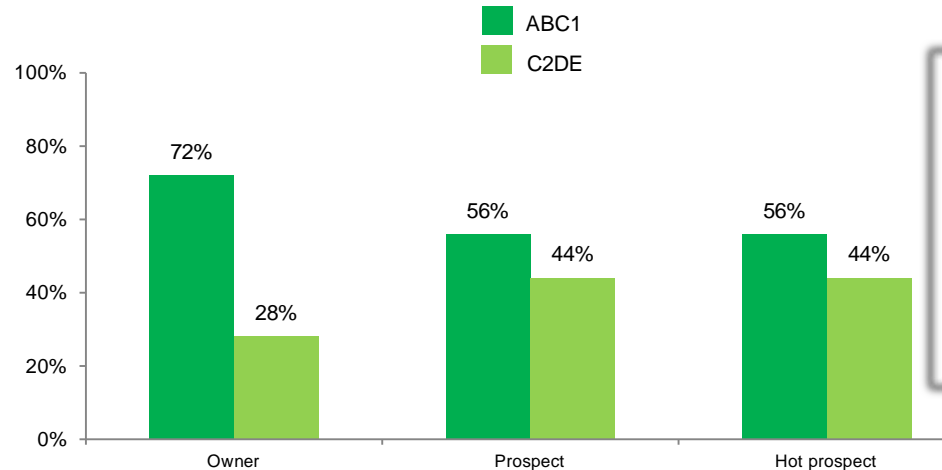
Gender



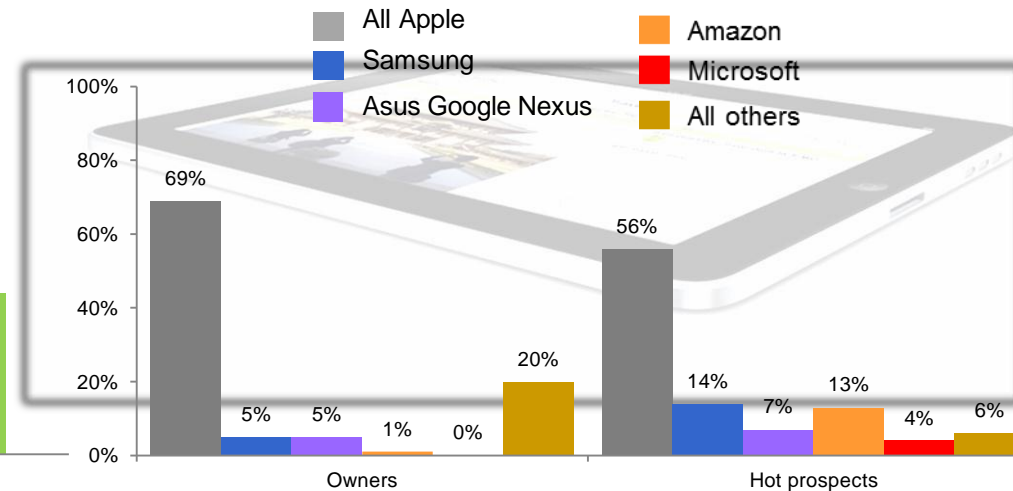
Age



Social grade

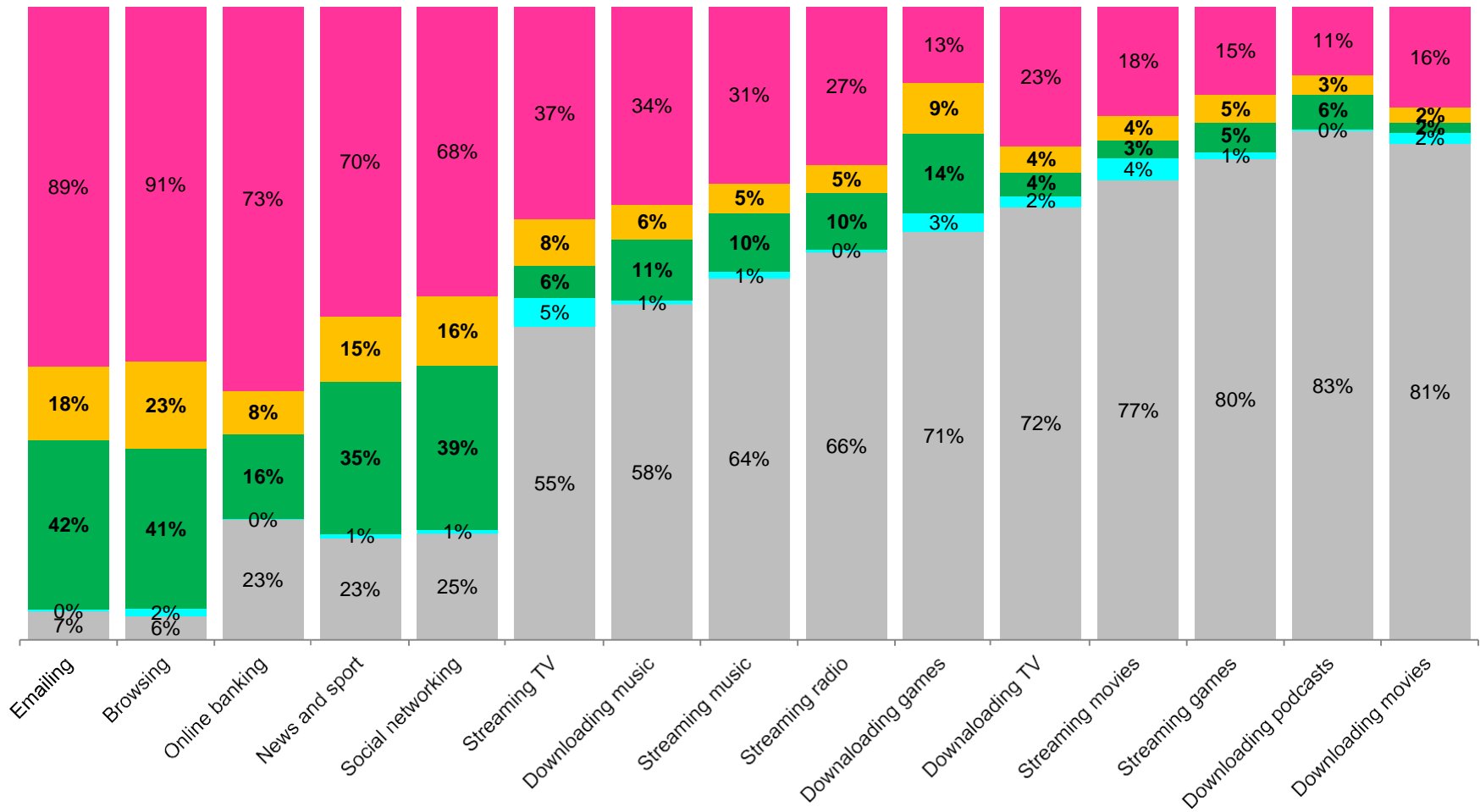


Brand



Online activities conducted in the last 3 months

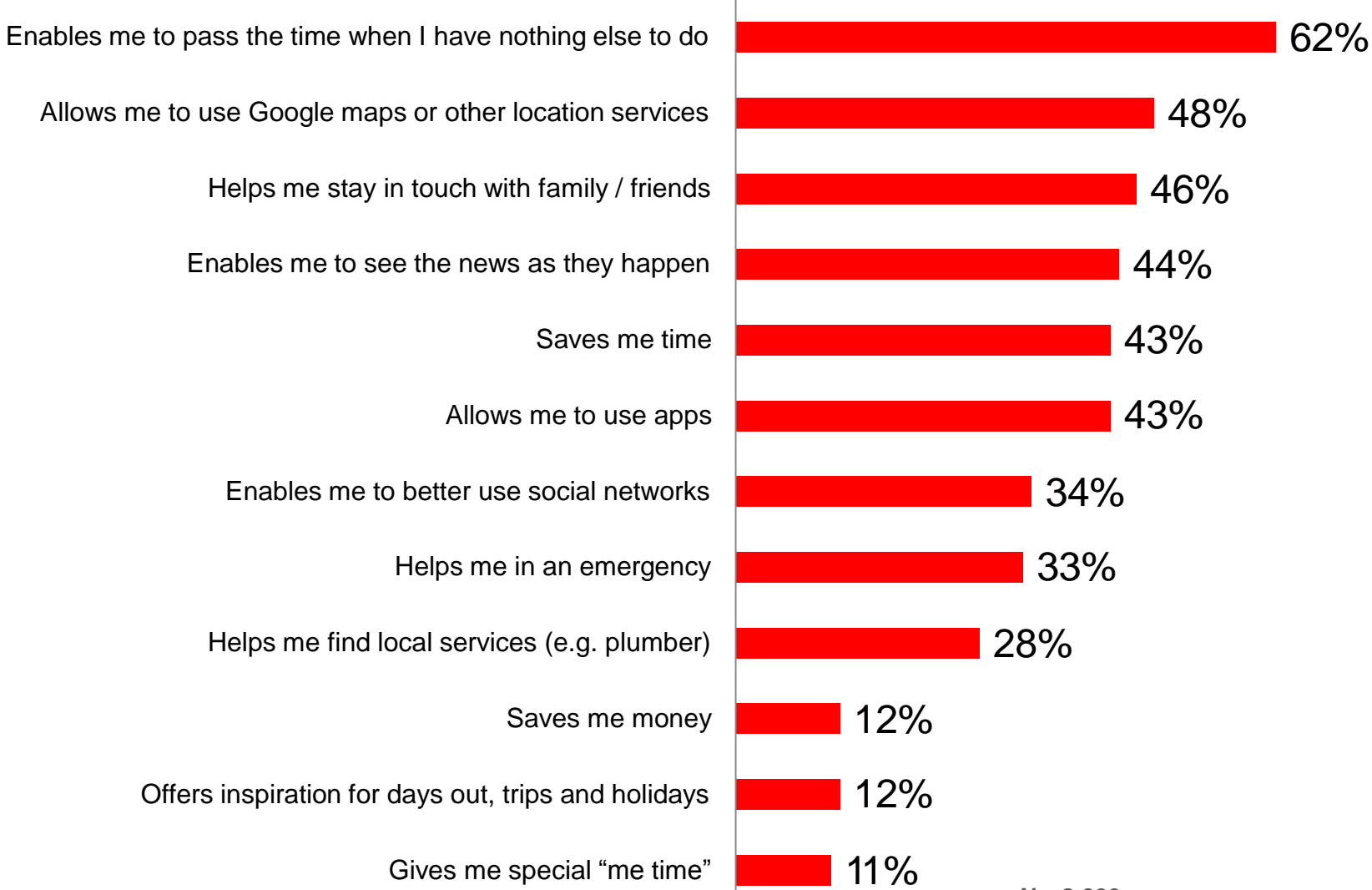
- Computer
- Tablet
- Phone
- Games console
- N/A



N = 1,150 UK Nat Rep

Reason for using the internet on phone

(December '12)



N = 2,399

How big is the UK smartphone & apps market?

47 Million UK Adults



**~30 Million
Smartphone Users**



64%
Use a Smartphone

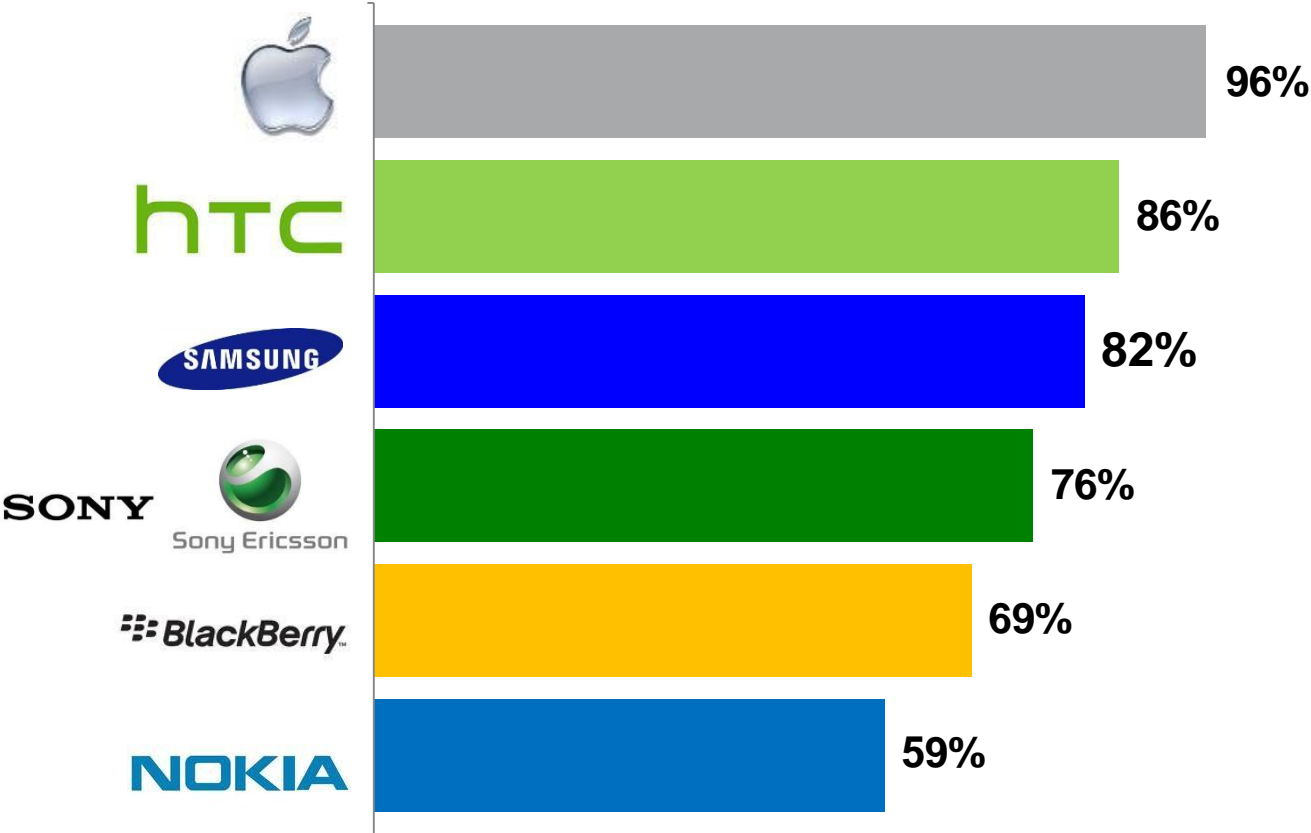
**~27 Million
Download Apps**



89%
Download Apps

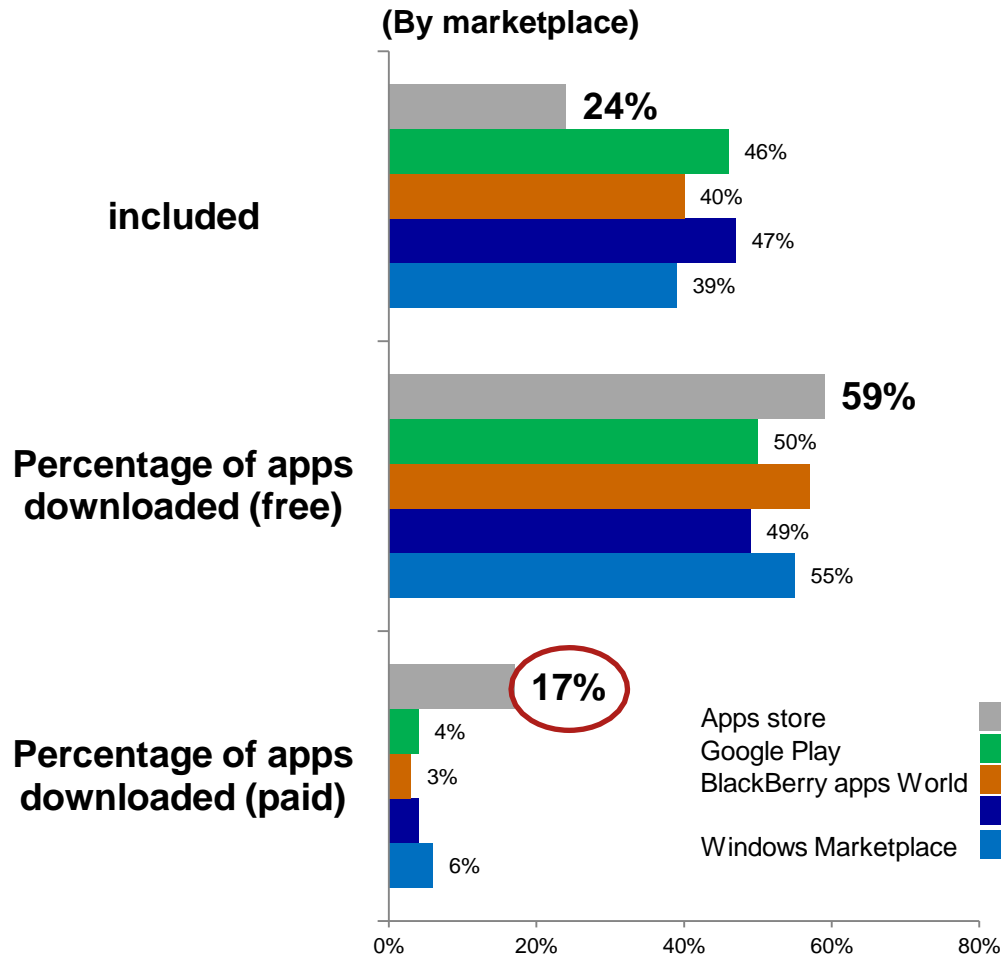
Downloading of smartphone apps






Downloading of Apps
(By smartphone)



N = 2,660
UK Smartphone Owners

Total of apps downloaded (inc. default)

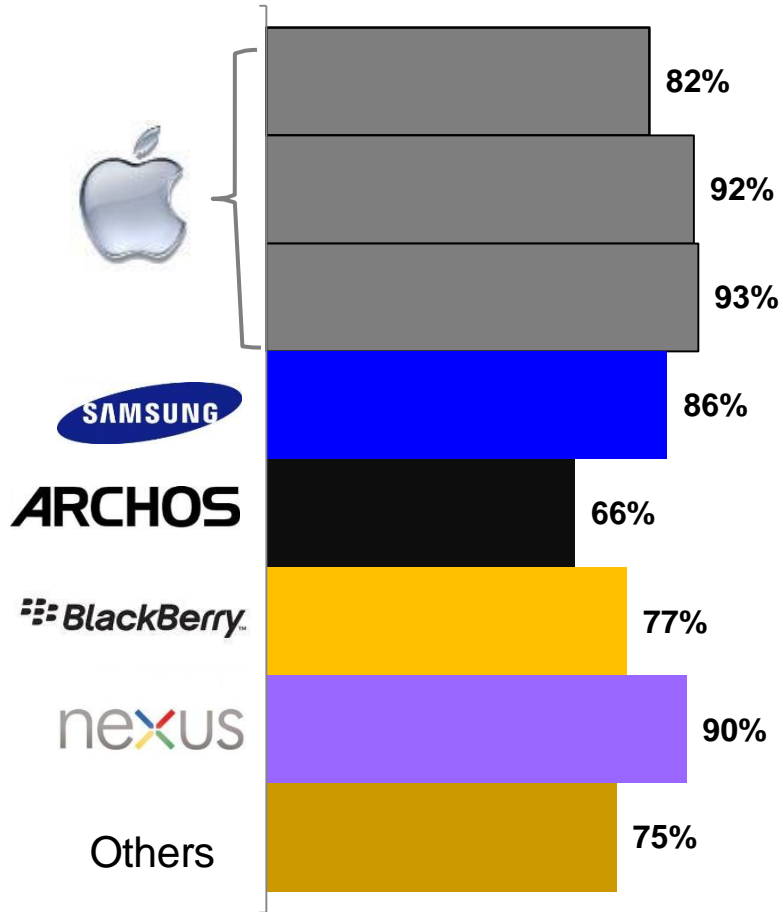


Store	Average number of apps on handset
	
 Google play	25
	
	19
	

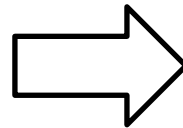
Caution, small base size (<50) for Ovi, results are indicative only

Apps downloaded on tablet

Downloading of Apps
(By main tablet)



N = 1,832, Tablet Owners



Average number of apps
downloaded (inc.
preloaded) (By main tablet)

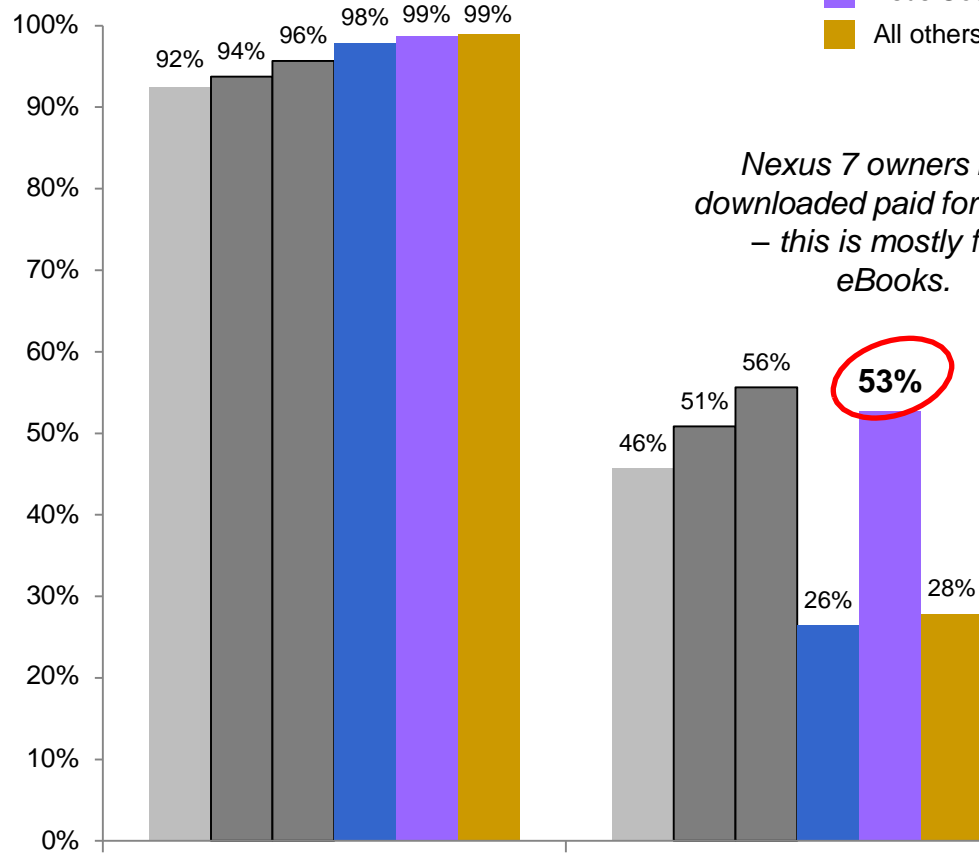
	November '12
iPad 1	21
iPad 2	24
iPad 3	23
Samsung	19
Google Nexus 7	26
All others	18

N = 1,590 have downloaded Apps

Nearly all have downloaded free apps

Types of apps downloaded (By main tablet)

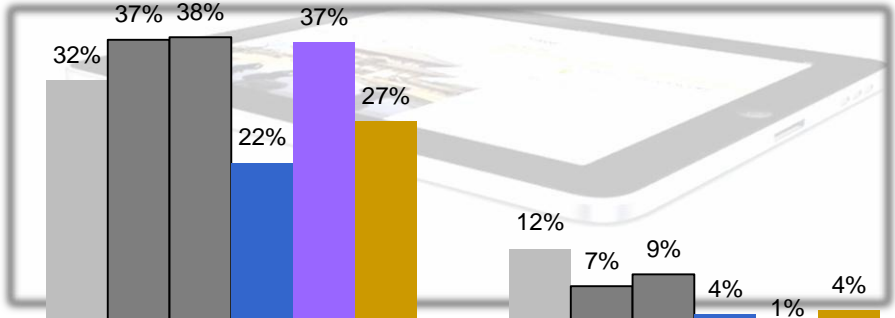
- iPad 1
- iPad 2
- iPad 3
- Samsung
- Asus Google Nexus
- All others



Nexus 7 owners have downloaded paid for content – this is mostly from eBooks.

Monthly app spend (By main tablet)

	W10
iPad 1	£2.42
iPad 2	£2.51
iPad 3	£2.35
Samsung	£2.25
Google Nexus 7	£2.29
All others	£2.43



Free versions

Full paid for versions

Lite versions/Demo versions/Trial versions

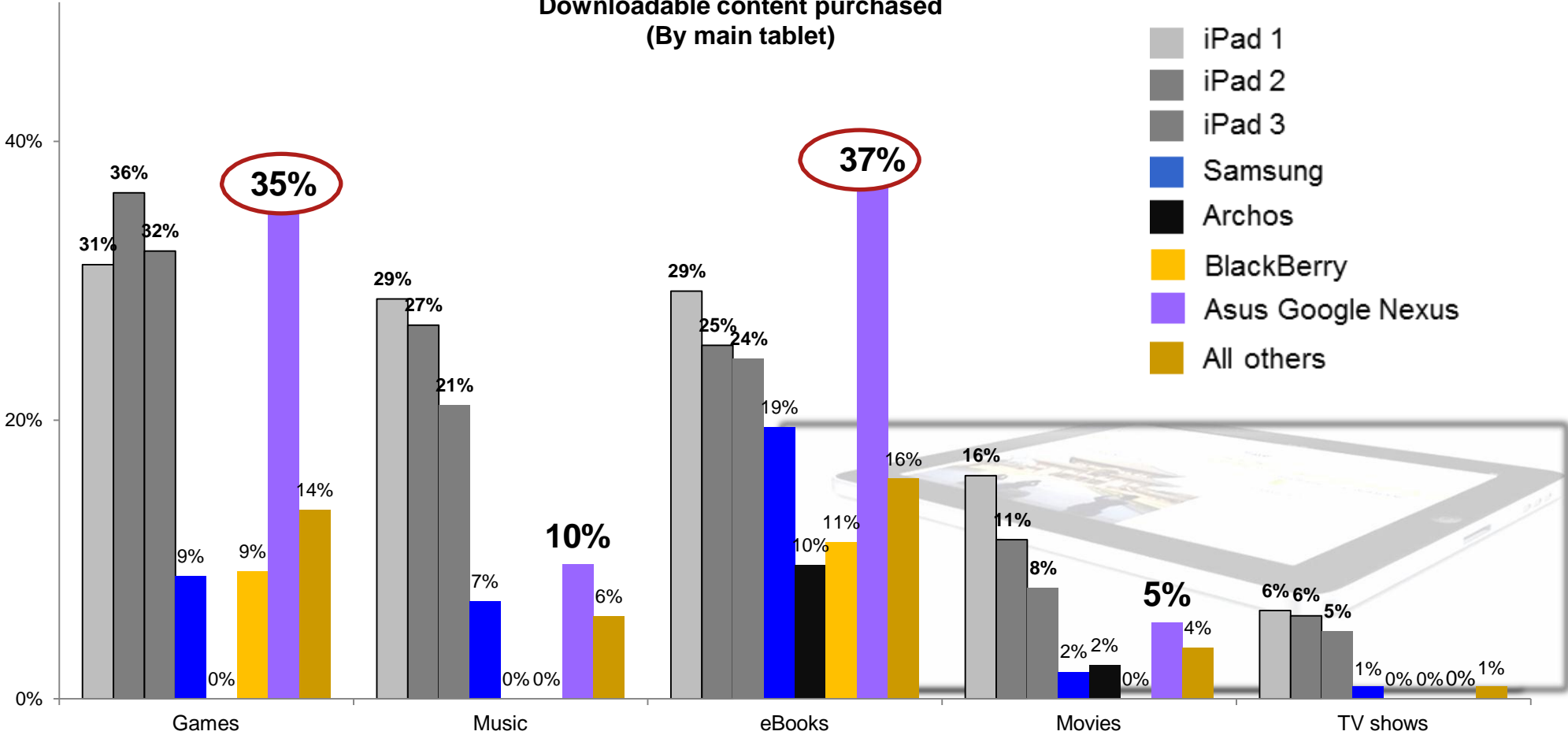
Subscription versions

N = 1,590 have downloaded Apps

Archos and Blackberry excluded due to low base

iPad and Nexus 7 owners are more likely to have purchased content

Downloadable content purchased
(By main tablet)

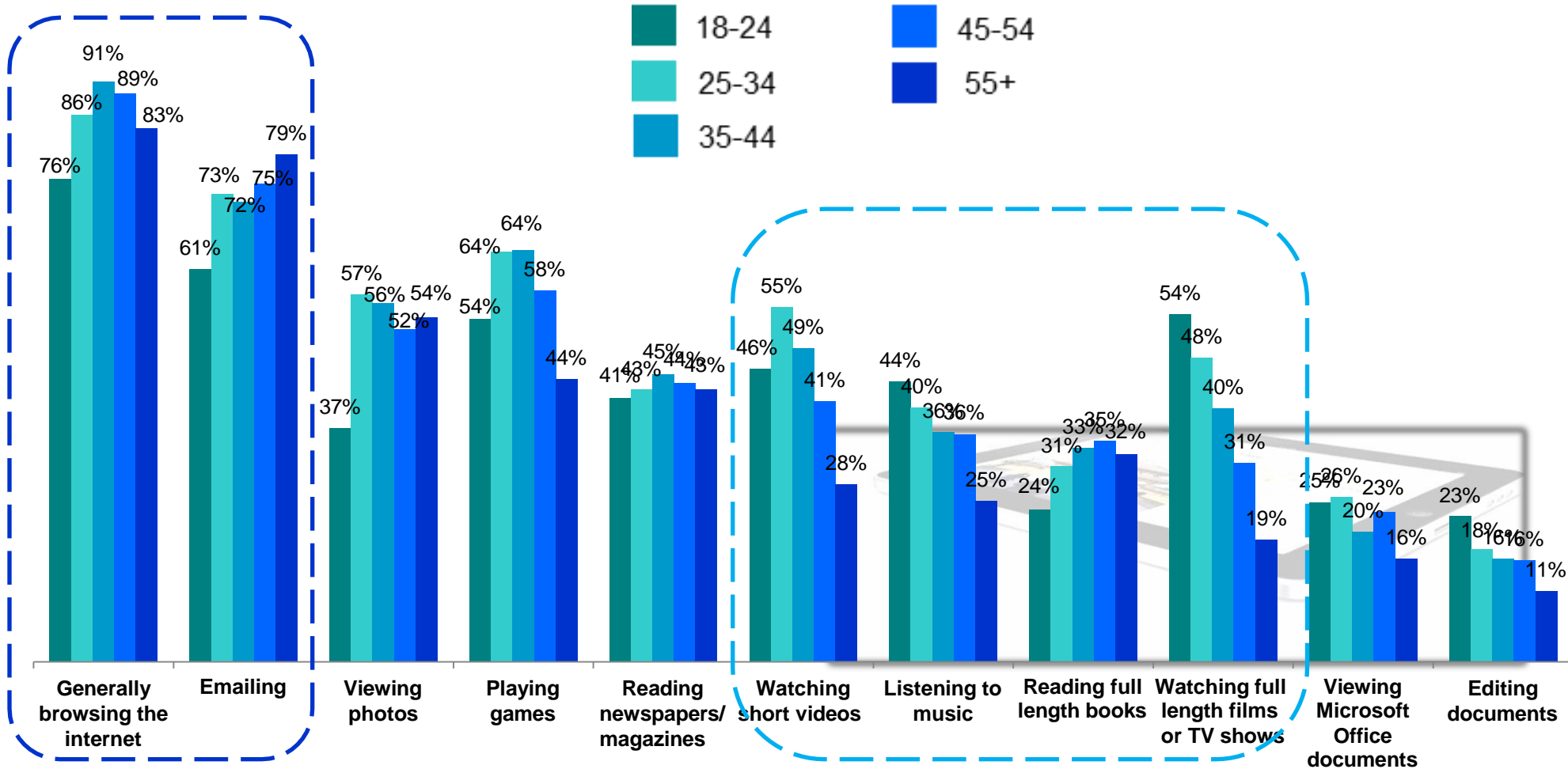


N = 1,832, Tablet Owners

NB: Low base for Archos and BlackBerry

Type of activities participated in on tablet

Types of activities participated in on tablets
(By main tablet)

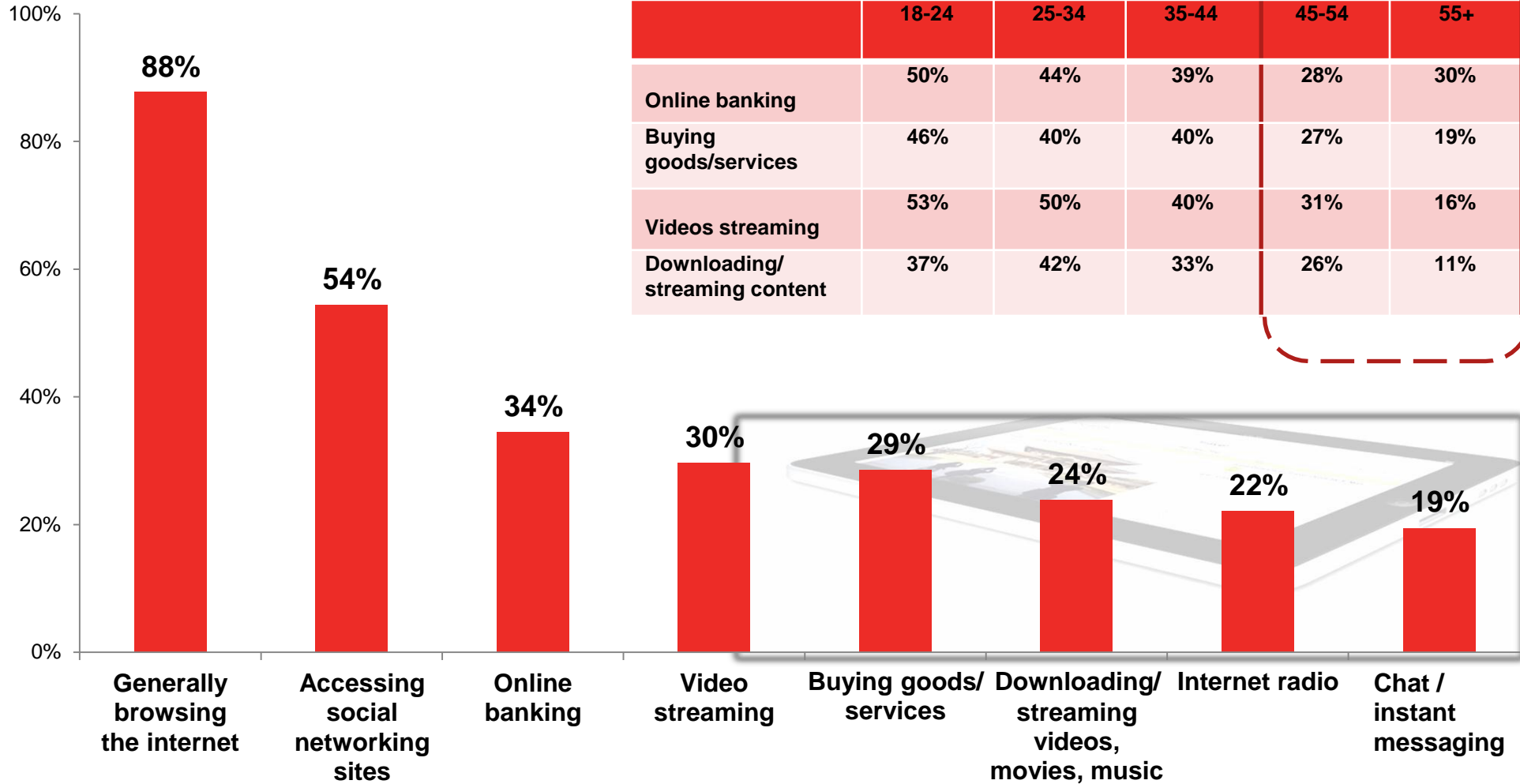


N = 1,832, Tablet Owners

NB: Low base for Archos and Blackberry

Older respondents less likely to have participated in 'heavier' activities

Types of online activities participated in on tablets
(By those that participate at least weekly)



N = 1,832, Tablet Owners



What holds for the future?



- **Demographics**

- Youth have the interest but Boomers have the money

- **Content is King**

- Increase in streaming/downloading across platforms
- Apps



- **Battle of the OS**

- iOS v. Android v. Windows
 - Ubuntu and BB10



- **Does Size matter?**

- Tablet 7" v. 10"



- **Play Meets Work**

- BB10 and Surface
- Windows 8 - Surface, Samsung, Asus, etc.
- BYOD -security and privacy



Questions or comments?



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