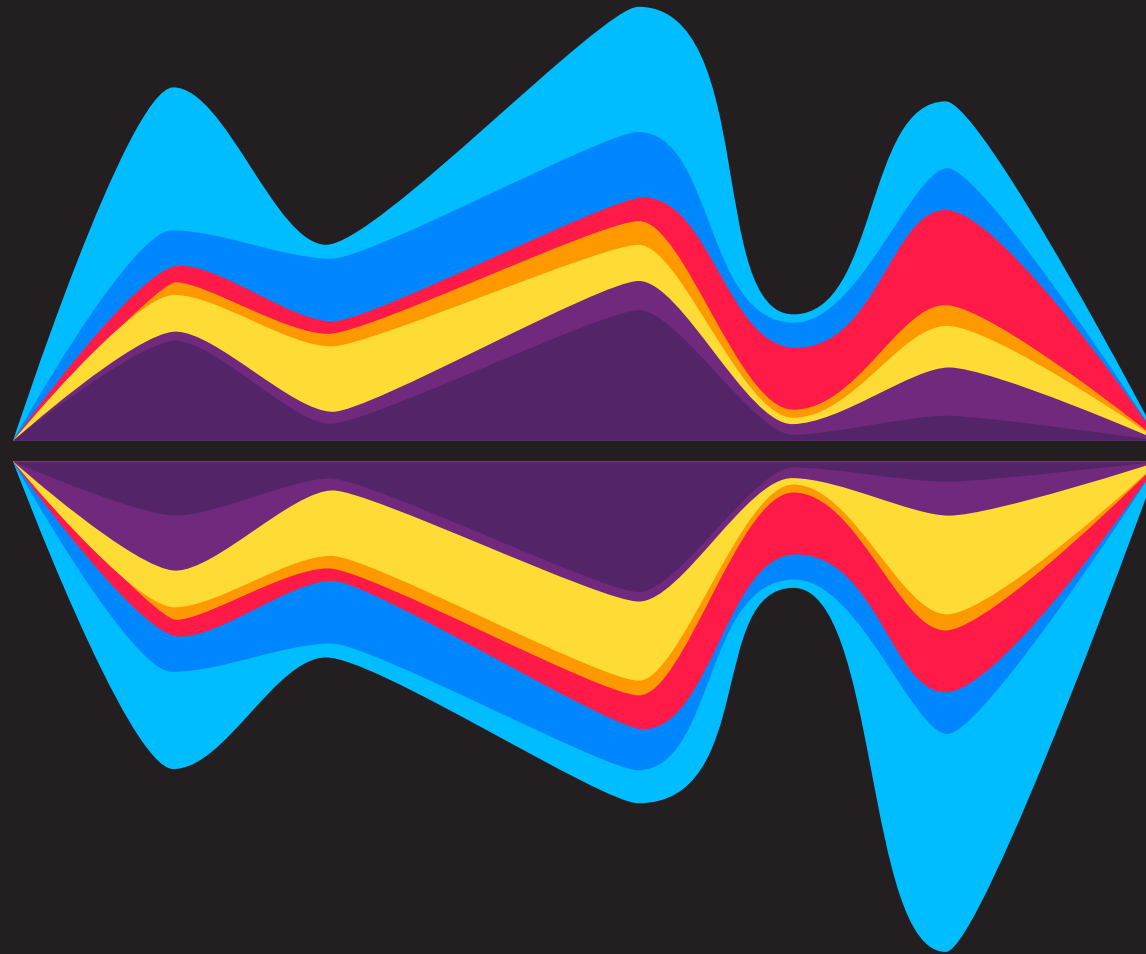


The Holistic Portfolio:

Decision Making in the Mobile Ecosystem





Mobile Phone Purchase



Mobile Phone Purchase



Search

Web About 110,000,000 results (0.21 seconds)

Shopping About 3,130,000 results (0.53 seconds)

Maps 36 suggested stores (within 1 mile radius)

If you purchase a mobile on a 24 month contract in a developed market, 2 years later up to 80% of the products you come to view may be different. The pace of change will refresh manufacturers' portfolios of devices, whilst digital media fragments the number of information sources you can use to research your purchase.

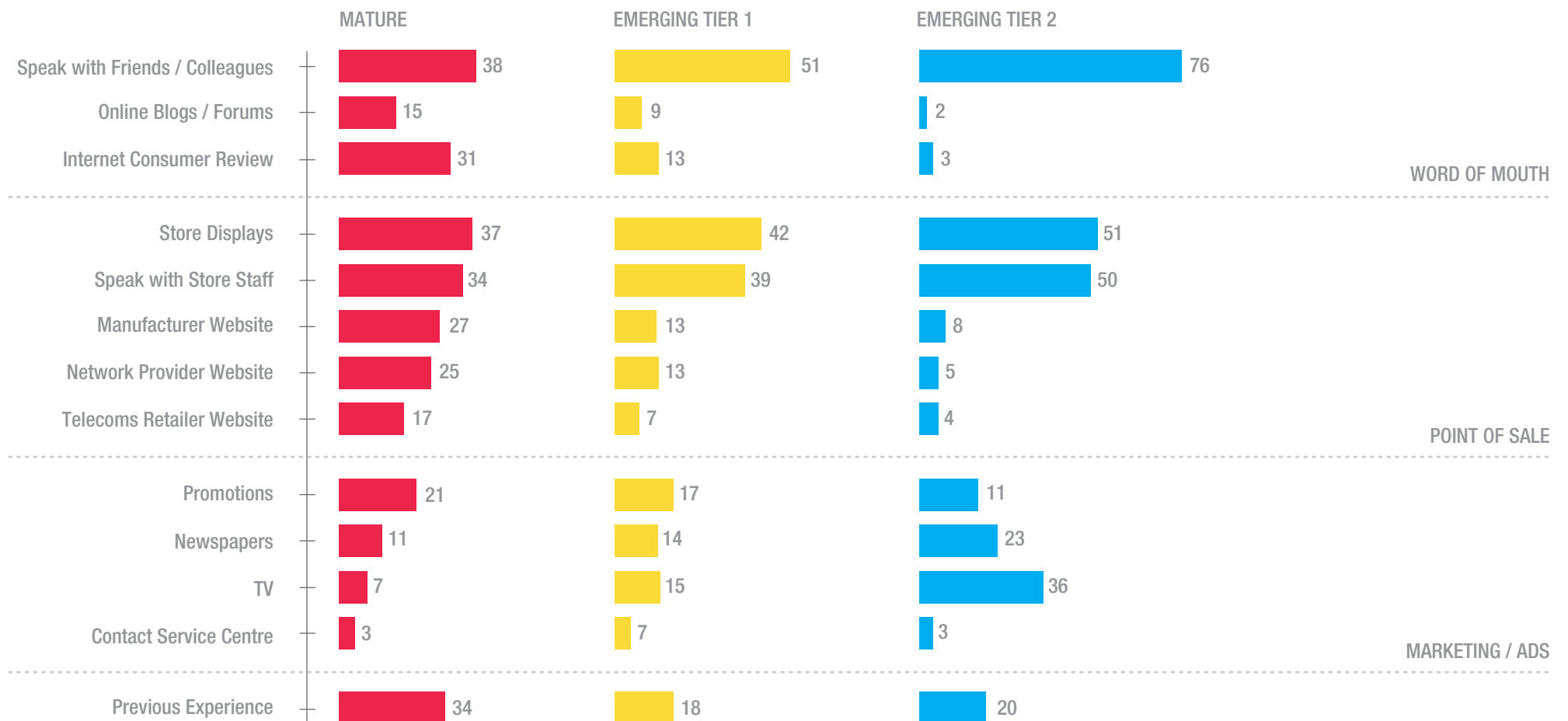
Consumers in the developed world are used to this; they're choosy, consulting the wide variety of sources they have at hand. Brand plays a more prominent role in the emerging world, where aspirations can be played to successfully.

Social networking, mobile banking and navigation grew globally during 2010. Partnering with content brands and offering access to these new services will be key in 2011.

As markets mature, consumers tend to consult a wider number of sources – a result of higher reliance on digital touchpoints and previous experience

SOURCES OF INFORMATION CONSULTED WHEN LOOKING TO BUY A MOBILE PHONE

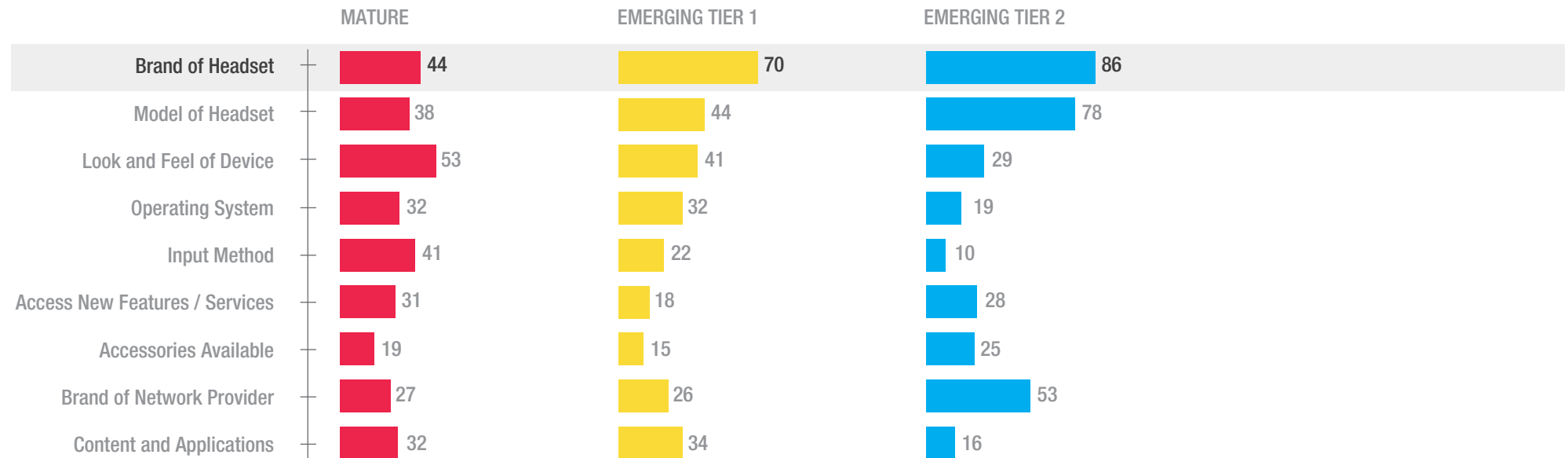
Source: Mobile Life: GTI 2011



Handset and network brands hold strong equity in emerging markets, but as markets develop, content and apps along with OS gain momentum

IMPORTANT FACTORS IN PRODUCT DECISION MAKING

Source: Mobile Life: GTI 2011

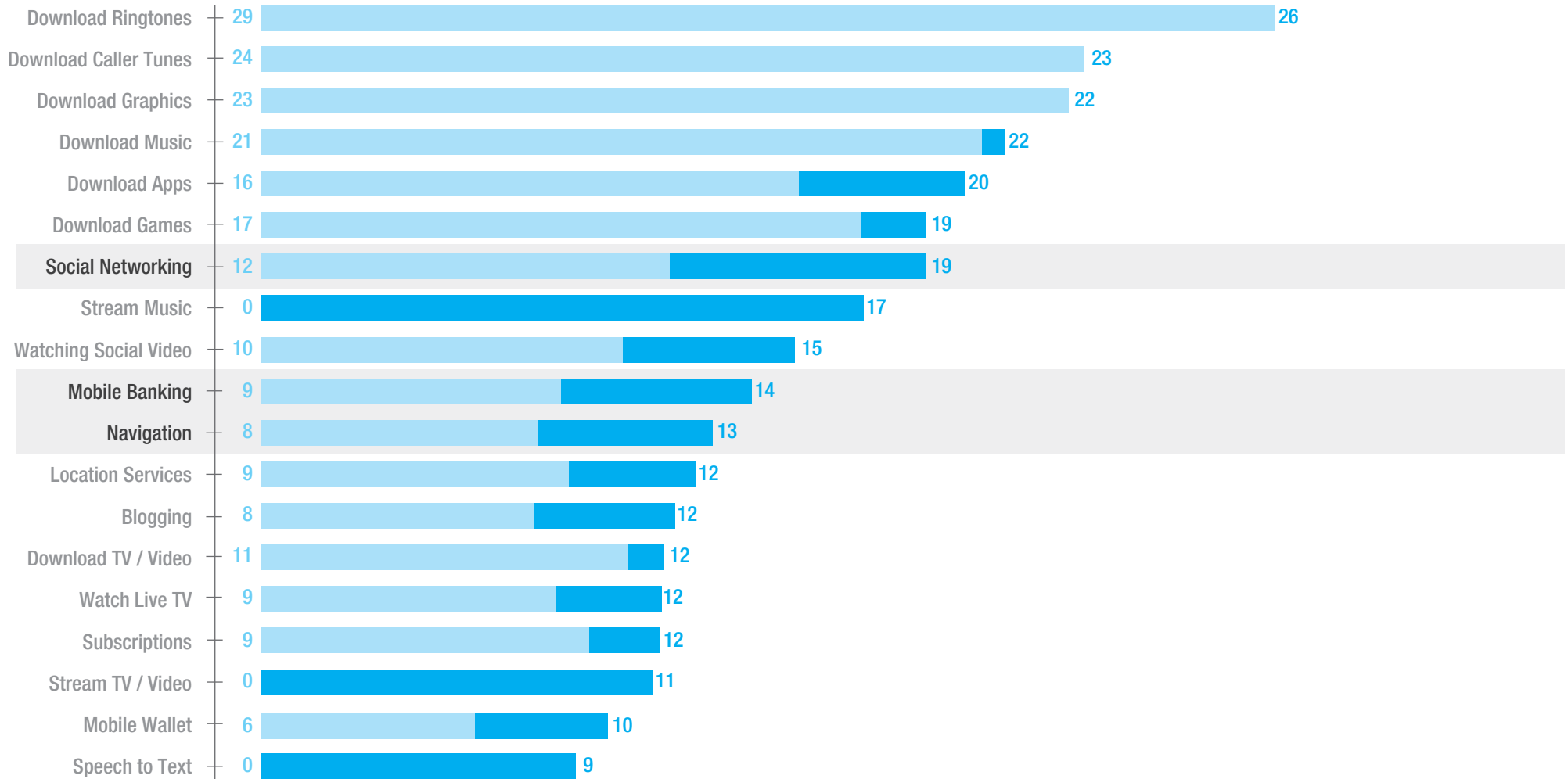


Social networking, mobile banking and navigation services are seeing strong growth in 2011

USAGE OF SERVICES

2010 2011

Source: Mobile Life: GTI 2011

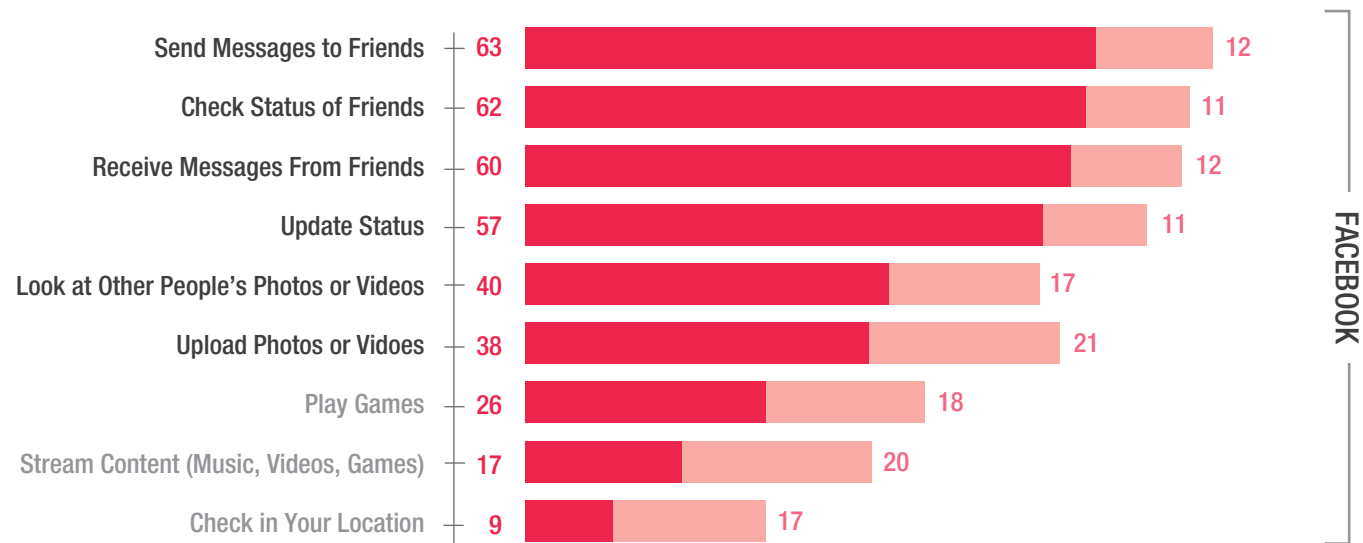


Content brands that offer multiple services through a single portal hold potential to gain equity by piggybacking consumer behaviours

USAGE AND DEMAND FOR SOCIAL NETWORKING SERVICES - %

Currently doing Would like to do

Source: Mobile Life: GTI 2011



To find out more, please contact

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