



Mobile A&U Research Results



SEPTEMBER 2007

RESEARCH RESULTS

Understanding the Mobile Consumer

Background and Methodology

- InsightExpress fielded a study in July 2007 to better understand the mobile market, including consumer attitudes, behavior and usage.
- 2015 mobile respondents participated.
- The survey data has a margin of error of 3 to 5 percent, assuming a 95 percent confidence interval.

Executive Summary

- Mobile usage is pervasive across generations.
- Both Younger and Older Baby Boomers are taking part in, and embracing, mobile technology.
- All generations, including Younger and Older Boomers, have phones with extensive mobile features.
- Daily mobile activities show emerging usage trends, even among older generations.

Data Source: InsightExpress Mobile A&U Research on Research Study

The Mobile Moment is Here

- Having a mobile phone is as common as having Internet access.
 - 80% of those we surveyed have a mobile phone.
 - Internet penetration is about 78%.¹

Data Source: InsightExpress Mobile A&U Research on Research Study

[1] 2007 USC-Annenberg Digital Future Project. University of Southern California. August 2007. http://www.digitalcenter.org/pages/current_report.asp?intGlobalId=19.

Mobile for the Masses

→ Mobile phone penetration is spread equally across generations.

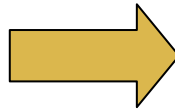
| | |
|---------------------------|-----|
| → Gen Y (18-24) | 85% |
| → Gen X (25-44) | 82% |
| → Younger Boomers (45-54) | 80% |
| → Older Boomers (55-64) | 79% |

Data Source: InsightExpress Mobile A&U Research on Research Study

Who's At the Cutting Edge?

- As respondents increase in age, the desire to upgrade their mobile device decreases.
- However, a significant portion of Boomer respondents are also interested in upgrading.

Over half of Gen Y-ers plan to upgrade their mobile in the next year or so.



| Gen X | Younger Boomers | Older Boomers |
|-------|-----------------|---------------|
| 37% | 30% | 24% |

Data Source: InsightExpress Mobile A&U Research on Research Study

Boomers Like Features Too.

Gens Y and X have feature-packed phones.

| | Gen Y | Gen X |
|-----------------|-------|-------|
| Mobile Internet | 51% | 47% |
| Text Messaging | 86% | 82% |
| Ringtones | 76% | 63% |
| Camera | 70% | 57% |
| Video | 18% | 14% |

So do Boomers.

| | Young B | Old B |
|-----------------|---------|-------|
| Mobile Internet | 39% | 32% |
| Text Messaging | 75% | 68% |
| Ringtones | 54% | 49% |
| Camera | 52% | 49% |
| Video | 10% | 7% |

Data Source: InsightExpress Mobile A&U Research on Research Study

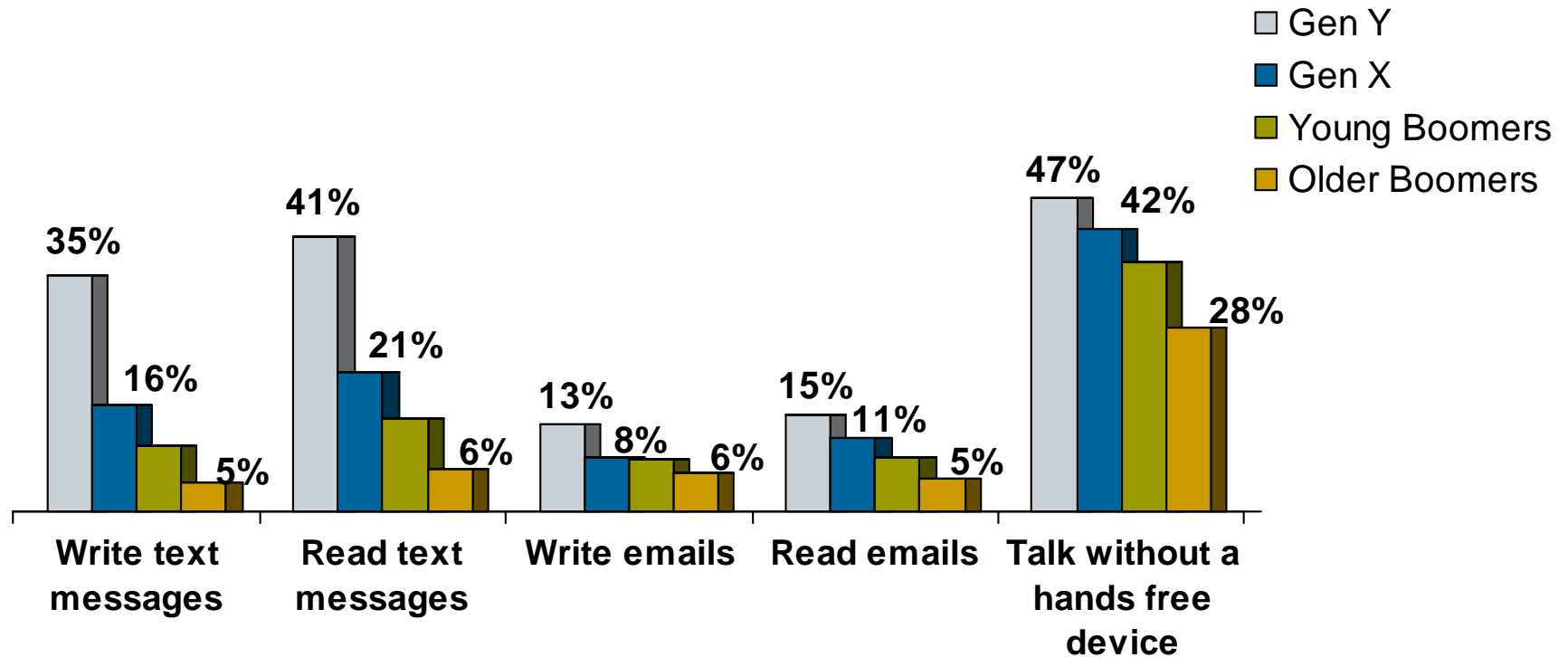
Today's Daily Mobile Activities Point to Tomorrow's Trends

| | Gen Y | Gen X | Younger Boomers | Older Boomers |
|-----------------|-------|-------|-----------------|---------------|
| Text Messaging | 43% | 22% | 16% | 10% |
| Mobile Internet | 8% | 7% | 4% | 3% |
| Video | 4% | 0% | 0% | 0% |

Data Source: InsightExpress Mobile A&U Research on Research Study

Mobile Behavior On the Road

Activities performed while driving at least once a week



Data Source: InsightExpress Mobile A&U Research on Research Study

Young and Old Recall Mobile Ads

- 2 in 5 Gen Y-ers using the mobile Internet, recall seeing some advertisement on their phone
- Roughly 1 in 4 older mobile users recall seeing ads on their phone

Data Source: InsightExpress Mobile A&U Research on Research Study.
Due to small base sizes, these findings are considered directional.



If you have further questions, please contact:

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