



Mobile internet – one year later

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- **Resume of 2008 conclusions**
- **Overview of 2009 findings**
- **Conclusions and implications for going forward**



Low frequency of usage appears to be driven by (mis)perception rather than real issues

$$\text{USAGE} = \text{\# OF USERS} \times \text{FREQUENCY}$$

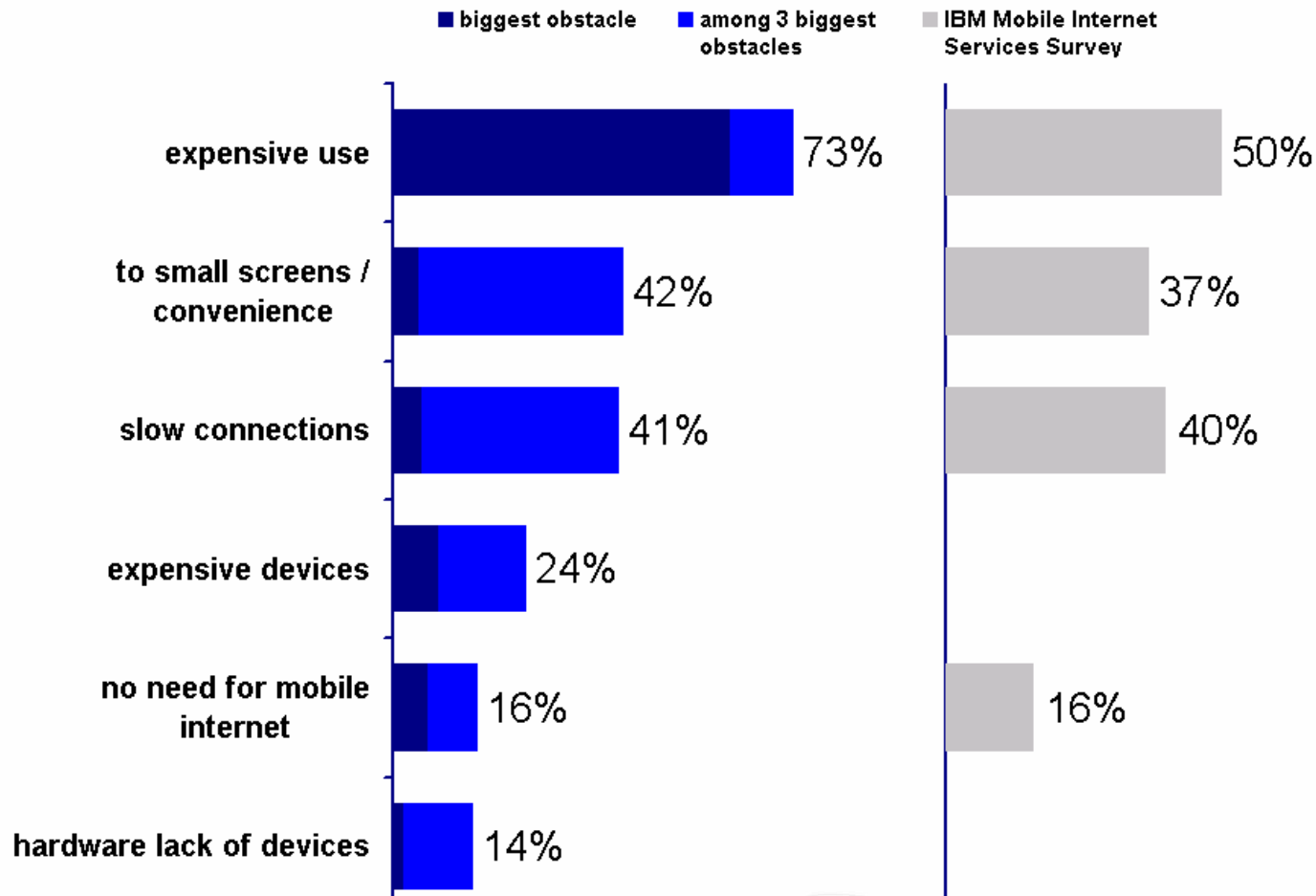
30% of all internet users use mobile device as one of their access points

Only 12% of internet users mobile internet service on daily basis

The main reason for not using mobile internet is the perceived high cost

Reasons for not using mobile internet services

Which are biggest obstacles for not using mobile internet or mobile internet services?



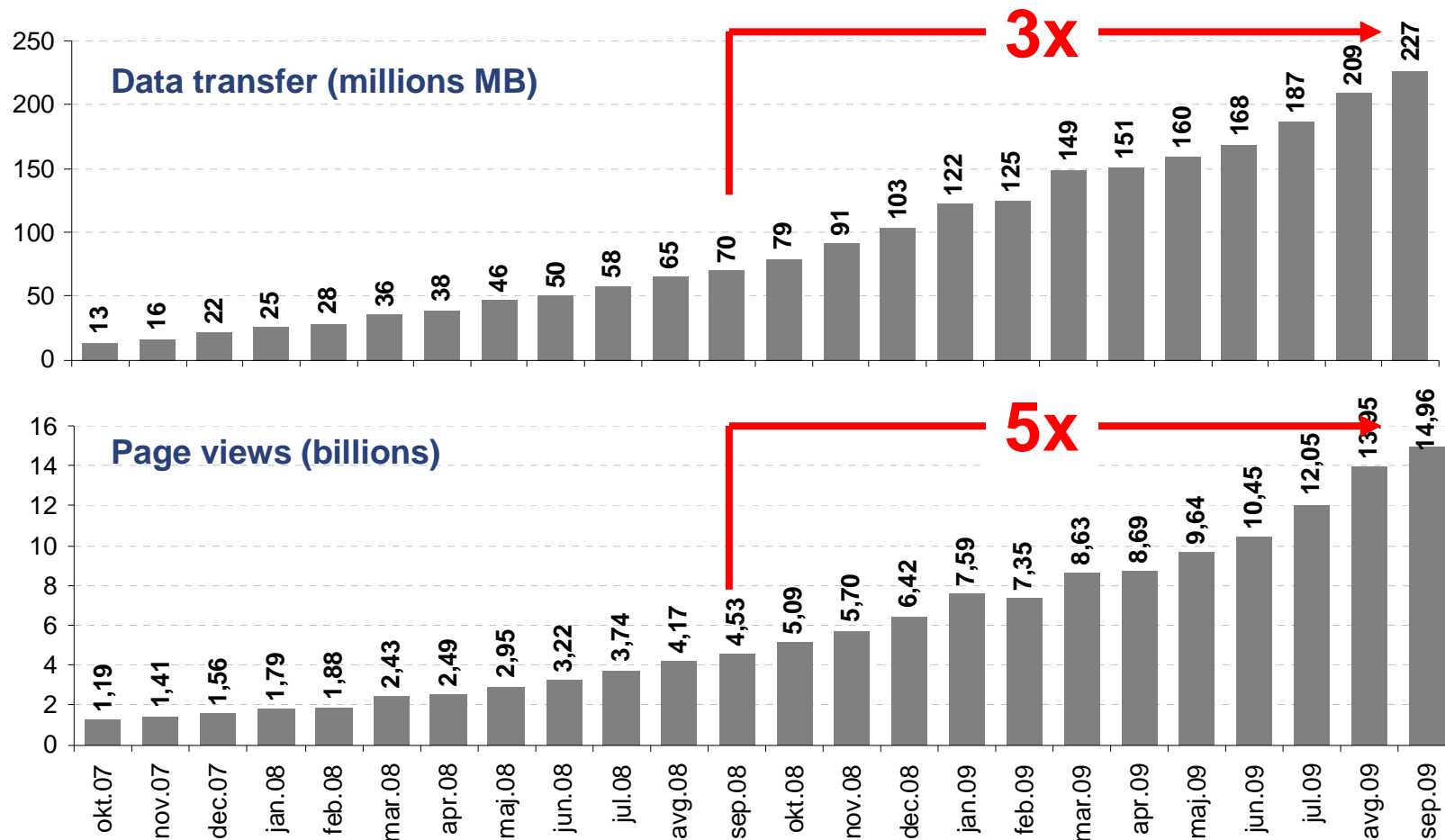
Source: iprom VALICON web survey, method CAWI, october 2008, n=347

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Some global players recorded extreme mobile internet growth rates in the last 12 months

Opera mini browser usage statistics

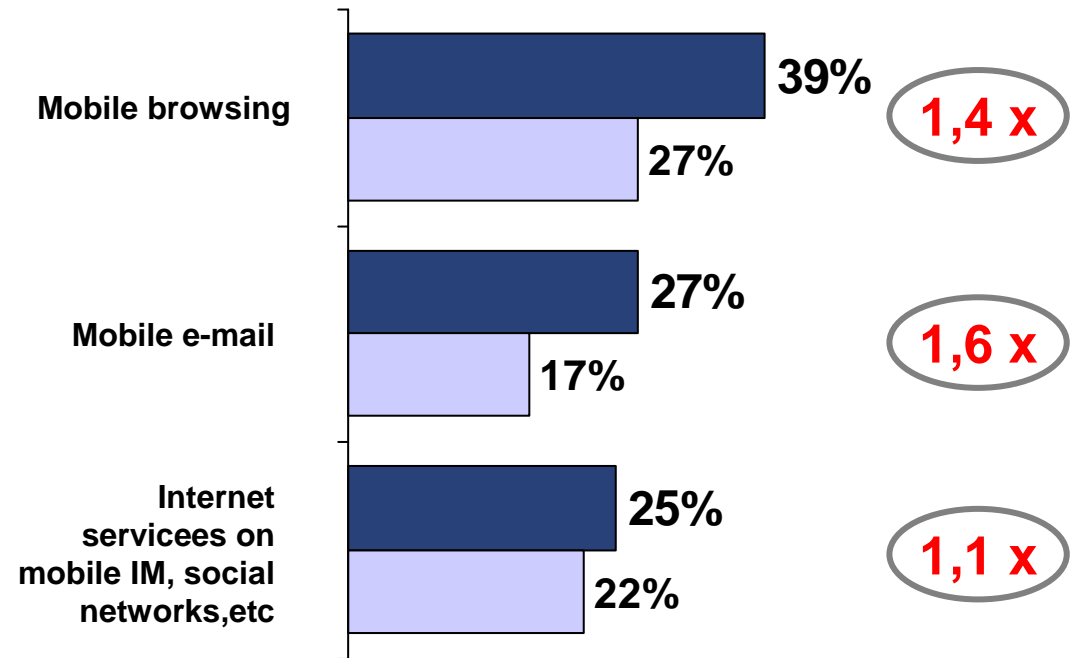
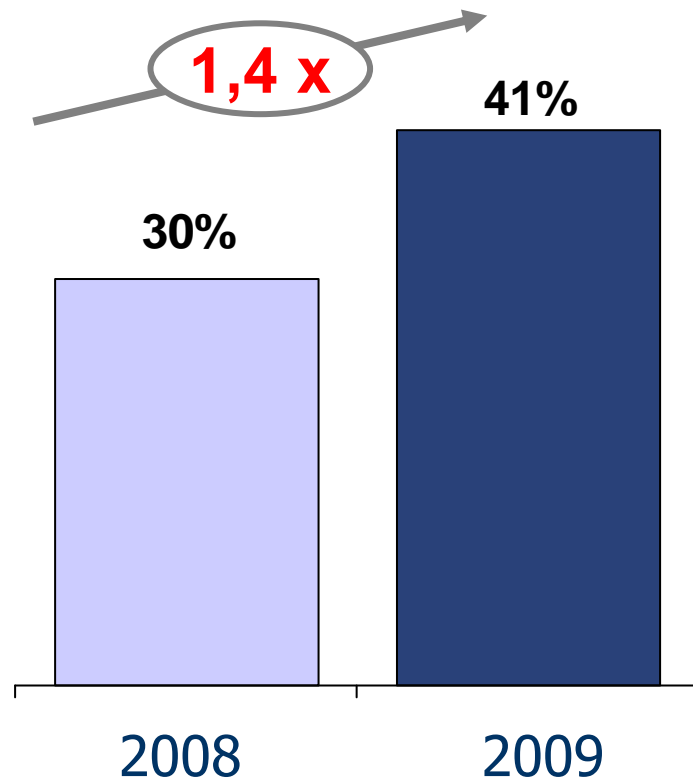
Opera Mini usage by Total data consumed per month (millions of MB) and Pages transcoded per month (billions) In top 10 countries



Finding 1: Mobile internet penetration has increased by almost 40%

Mobile Internet users

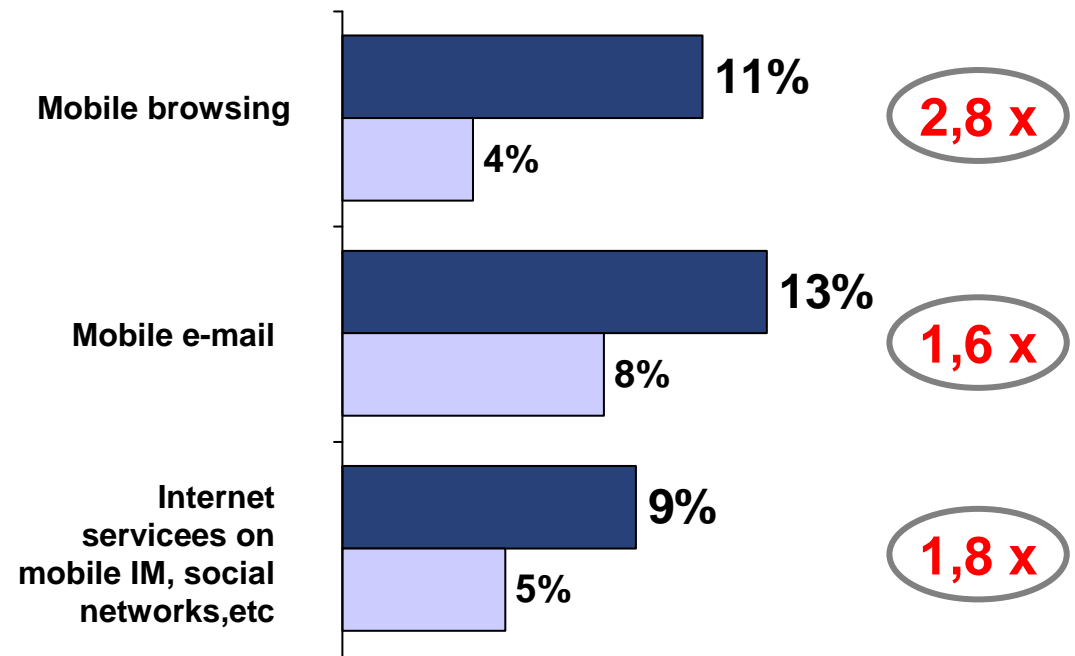
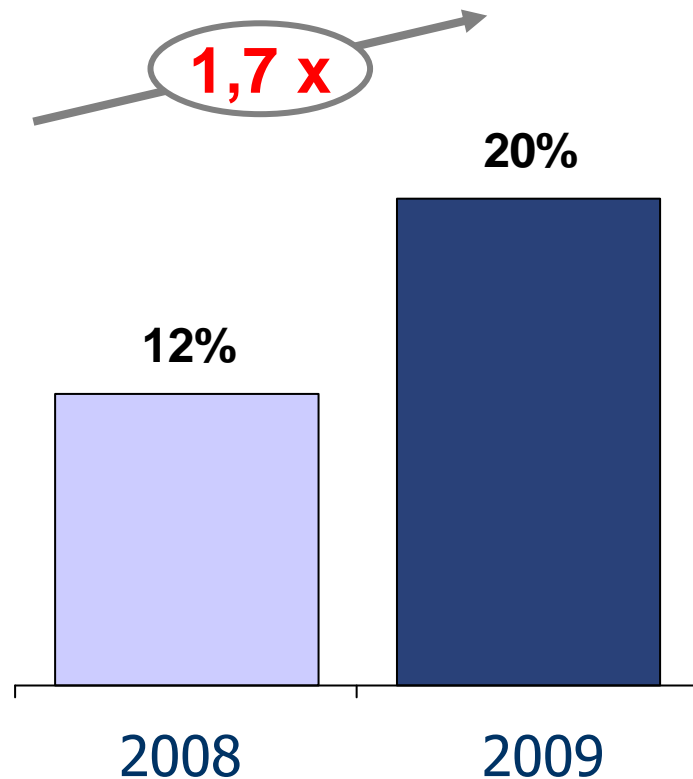
Access internet via mobile devices
Percent, 100 = all internet users



Also the frequency of mobile internet usage has increased significantly

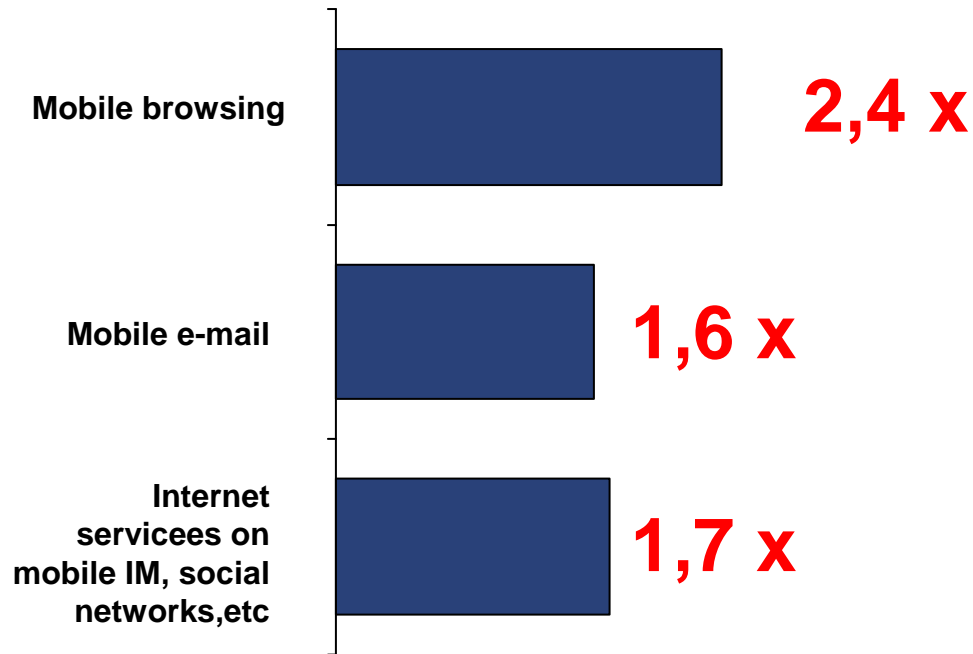
Mobile Internet usage frequency

Daily access internet via mobile devices
Percent, 100 = all internet users



$$\text{USAGE} = \text{\# OF USERS} \times \text{FREQUENCY}$$

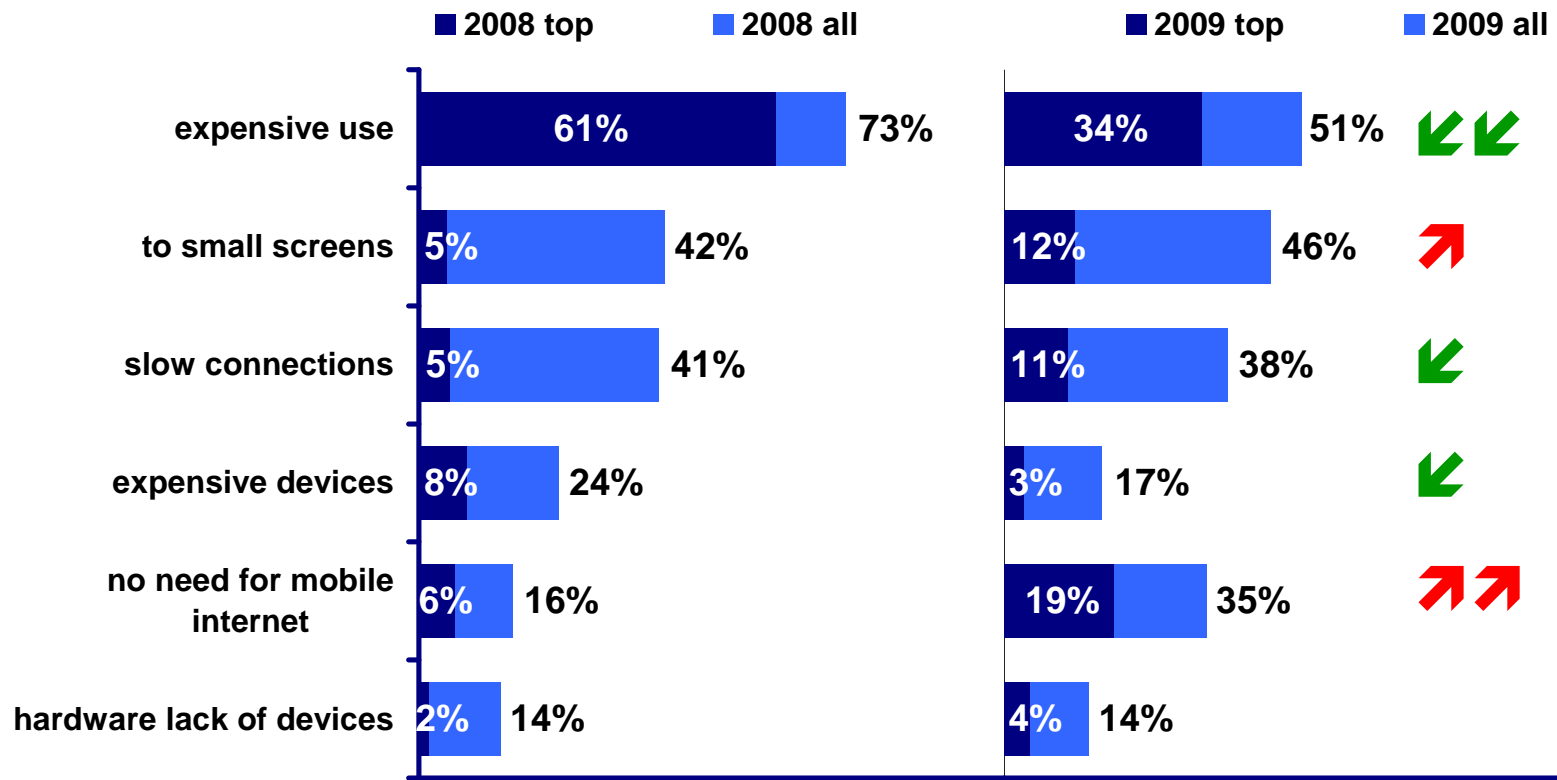
Mobile Internet usage increase 09 vs. 08
Increase in number of usage days



Perceived high cost remains top obstacle, but its overall significance has decreased

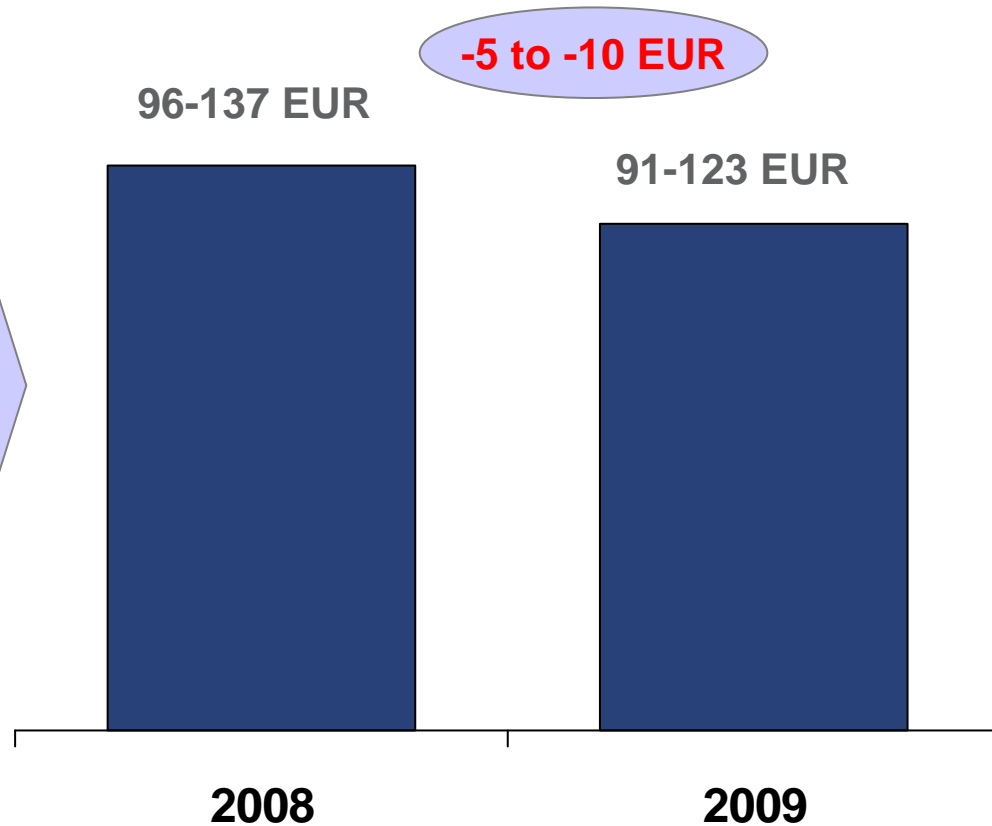
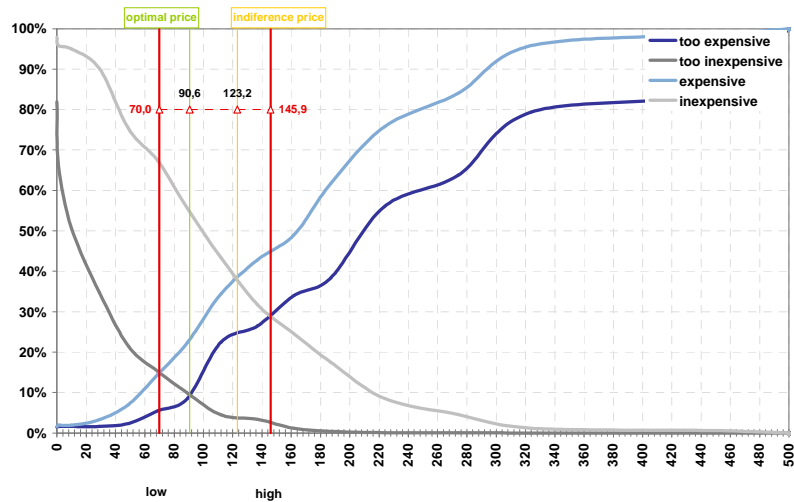
Reasons for not using mobile internet services

Which are biggest obstacles for not using mobile internet or mobile internet services?



The readiness to pay for a smart phone has not changed dramatically

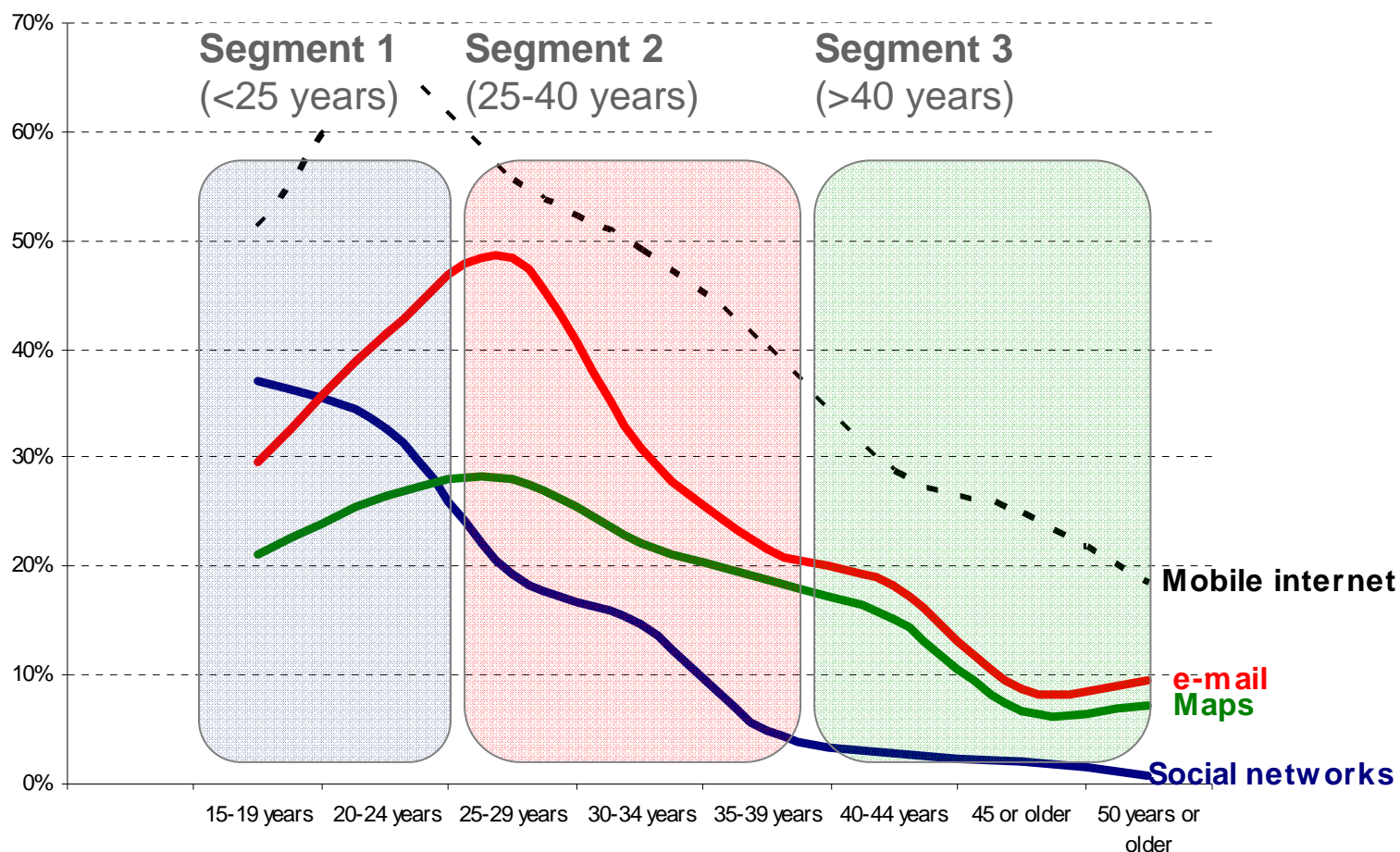
Expected price for a smart phone
 PSM analysis, comparison 2008 and 2009
 All mobile users



Usage of mobile internet strongly correlates with age, however drivers of usage differ

Penetration of mobile internet services by age group

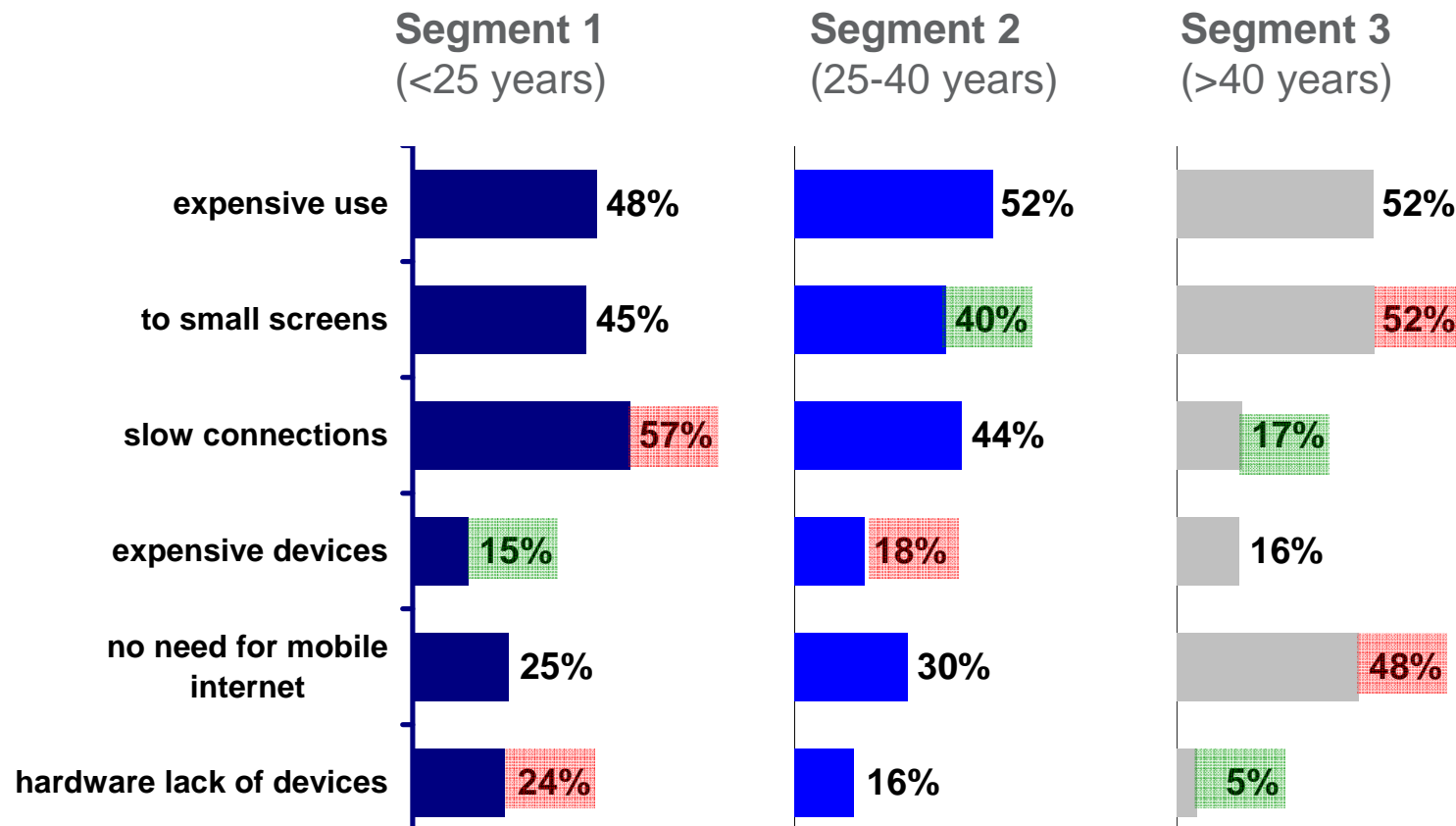
All internet users



Various age groups have different obstacles to mobile internet usage

Reasons for not using mobile internet services

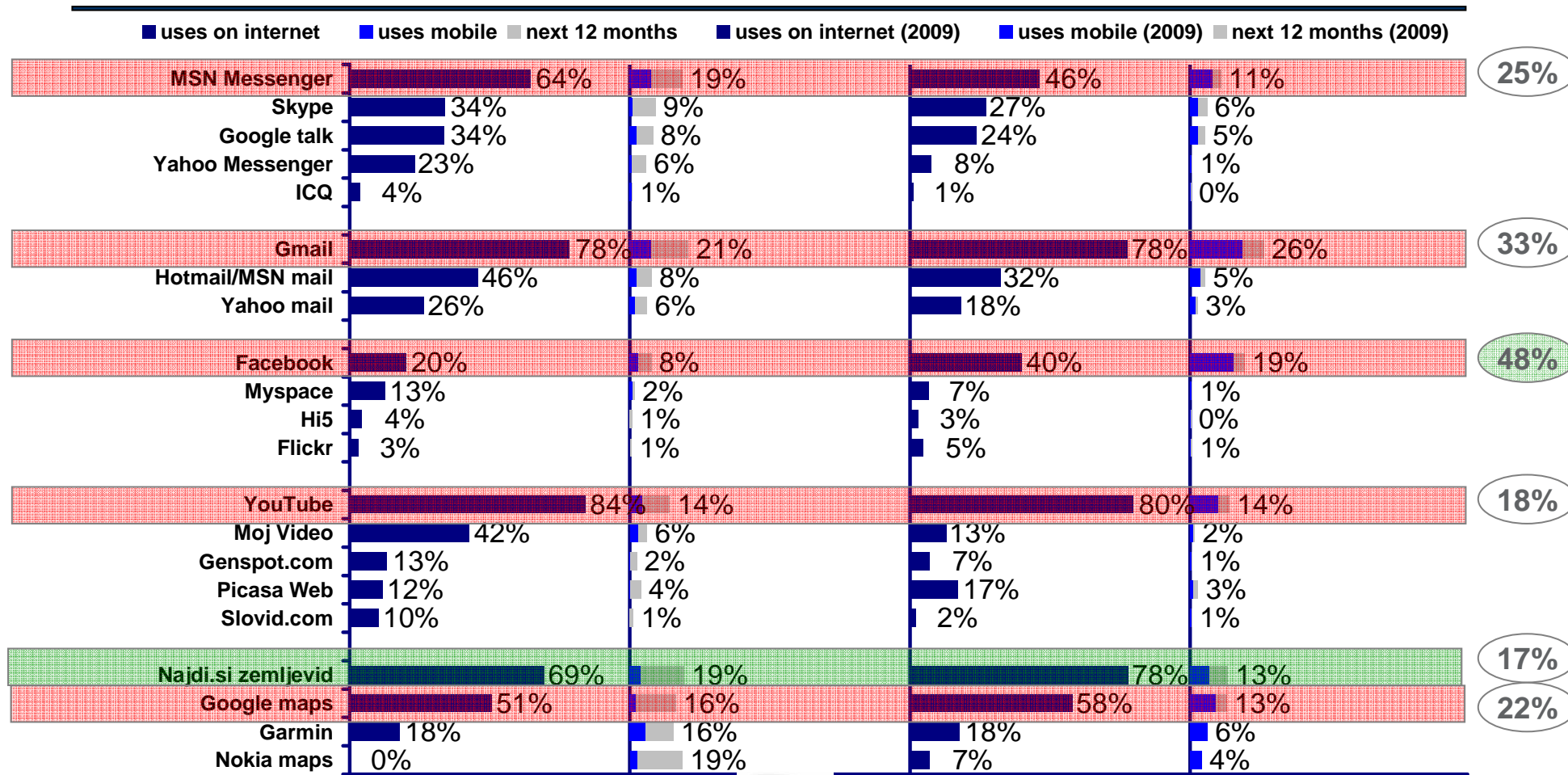
Which are biggest obstacles for not using mobile internet or mobile internet services?



Global internet players remain the major developers of mobile internet

Internet services

Use on internet, use on mobile device and intention to use service in next 12 months



Source: iprom VALICON web survey, method CAWI, october 2009, n=786

Top 3 internet sites used on mobile devices

September 2009

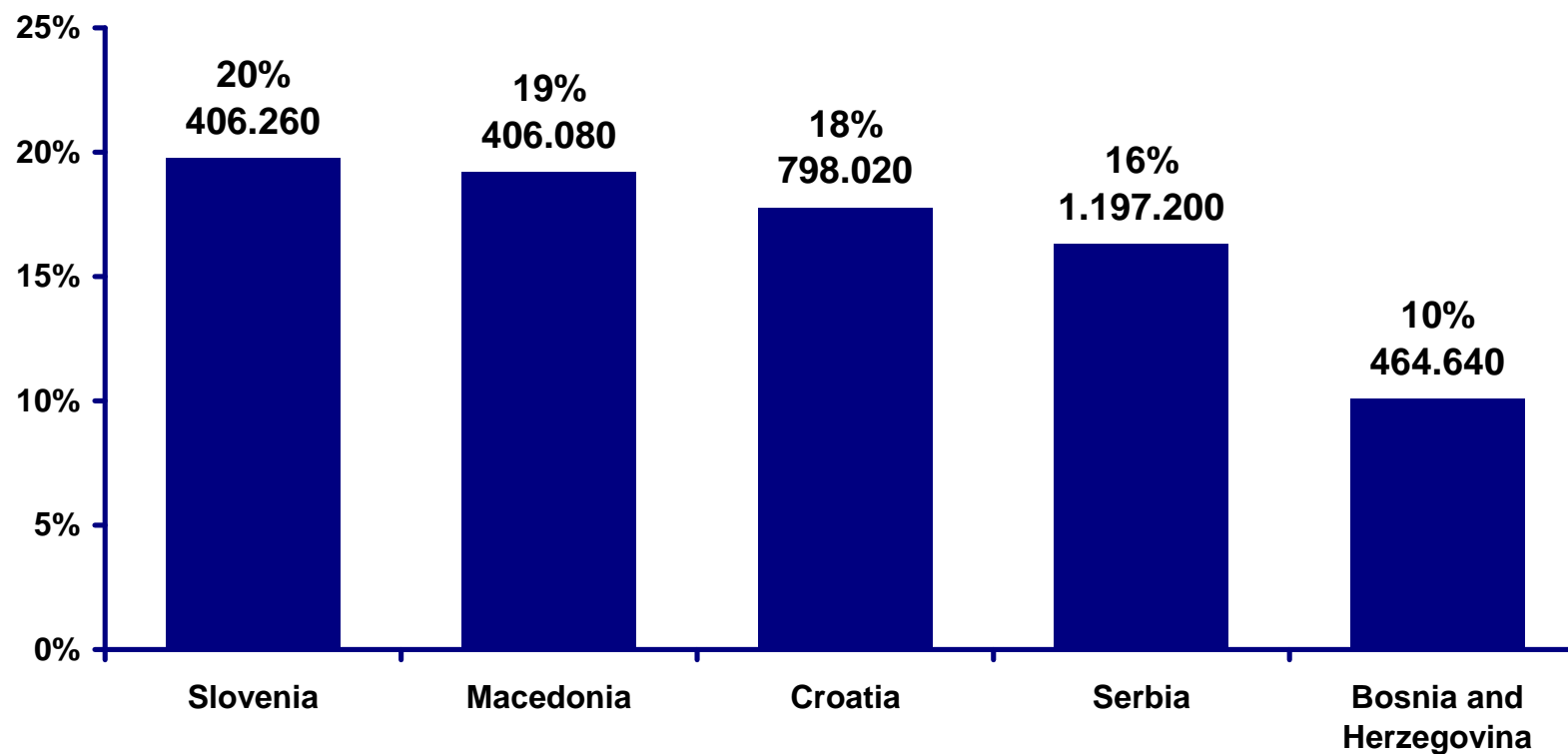
	USA	UK	POLAND
1.	google.com	facebook.com	Nasza-klasa.pl
2.	facebook.com	google.com	google.com
3.	yahoo.com	bbc.co.uk	onet.pl

Source: State of the Mobile Web, September 2009 (www.opera.com)

Mobile social network penetrations seems to be unrelated to general telco development

Share of Facebook users among countries

Estimated number of Facebook users by country



Source: FACEBOOK & WIKIPEDIA

- **Resume of 2008 conclusions**
- **Overview of 2009 findings**
- **Conclusions and implications for going forward**

- **In accordance with the predictions from last year there was a strong growth in mobile internet usage**
- **Obstacles to mobile internet usage identified in 2008 remain the same in 2009, however their relative importance has changed in line with predictions**
- **Although the mobile internet penetration correlates with age, there are significant differences in usage attitudes of at least 3 segments**
- **Global internet sites remain the major drivers of mobile internet, however there are examples of local sites taking the leading role**

- **Mobile internet will continue with rapid growth, both in terms of penetration and usage frequency**
- **Screen size will be the major obstacle for mobile internet development if operators continue to alleviate the “perceived” obstacles (price, speed)**
- **Social networking is the “killer application” for attracting young users, the issue however remains how to increase penetration among older users**
- **Local content and service providers have the opportunity to enter relatively unformed market, however they will need to clearly differentiate from global players**



For more information

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