



Pannel 4 - Broadband Content & Web 2.0

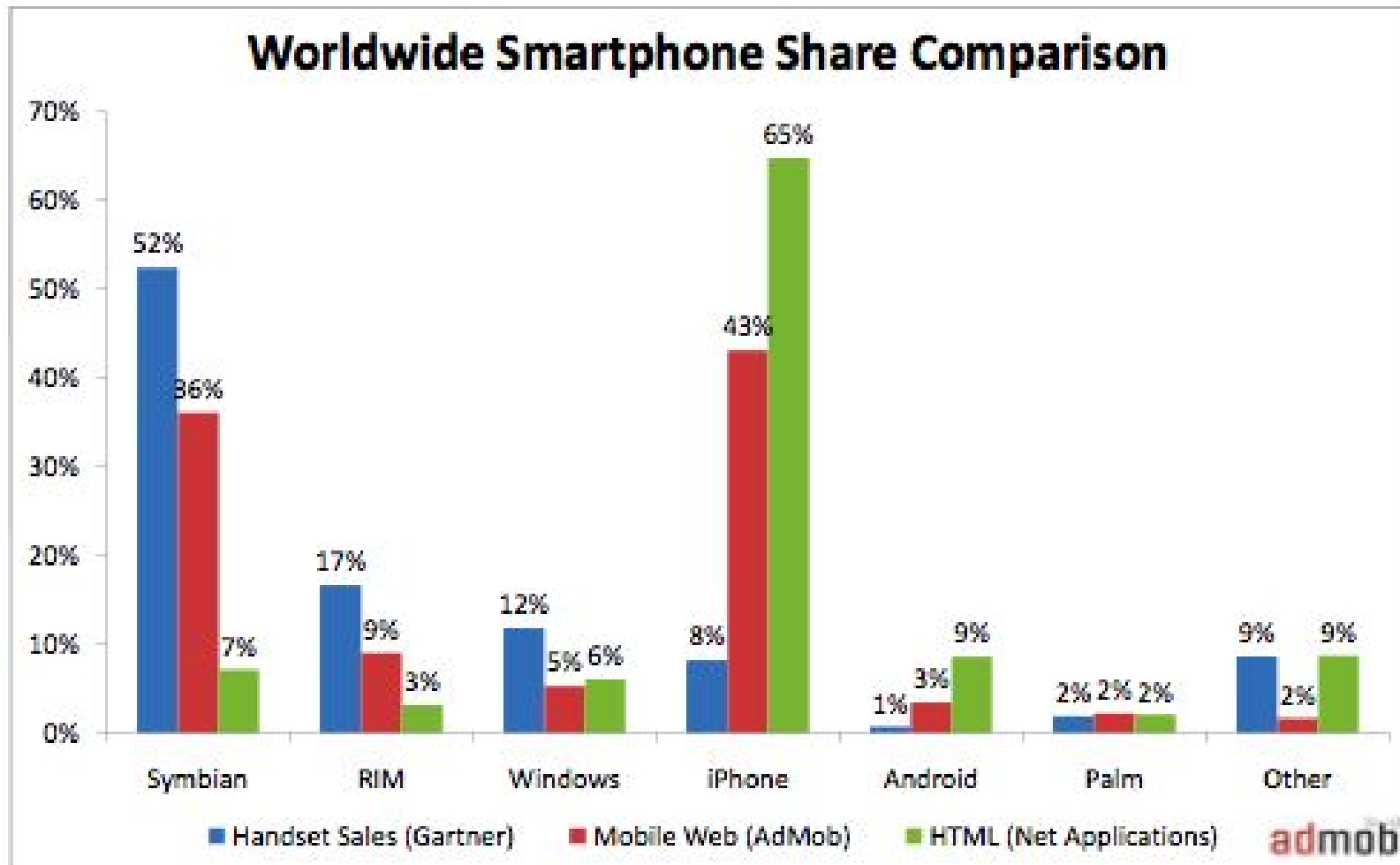
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Arabcom 2009



COMMUNICATIONS FOR A BORDERLESS WORLD

Highest mobile web traffic is generated by new smartphones...



Mobile Content Consumption – A comparison between handsets

Mobile Content Consumption: iPhone, Smartphone and Total Market: January 2008

Activity	iPhone	Smartphone*	Market
Any news or info via browser	84.8%	58.2%	13.1%
Accessed web search	58.6%	37.0%	6.1%
Watched mobile TV and/or video	30.9%	14.2%	4.6%
Watched on-demand video or TV programming	20.9%	7.0%	1.4%
Accessed Social Networking Site or Blog	49.7%	19.4%	4.2%
Listened to music on mobile phone	74.1%	27.9%	6.7%

Source: M:Metrics, Inc., Copyright © 2008. Survey of U.S. mobile subscribers. Data based on three-month moving average for period ending 31st January 2008, n = 31,389.

**Smartphones include devices running Windows, Symbian, RIM or Apple operating systems.*

M:Metrics is also the first to report use of the music playing capability of the iPhone, with 74.1 percent of iPhone owners listening to mobile music in January, compared to 6.7 percent of the total mobile audience. Eighty four percent of iPhone owners who use an MP3 player use an iPod.



iPhone Video Effect

- ▶ After seeing a 2-minute video about watching video on the iPhone,
 - ▶ 73% of non-owners are interested in watching video on an iPhone, and
 - ▶ 42% say they are “extremely” or “very” interested.

- ▶ Widescreen video is a compelling selling point for the iPhone:
 - ▶ half (50%) of non-owners who are open to buying the device say that seeing the iPhone’s video capabilities makes them more interested in buying one.

- ▶ Where do subscribers expect to get their content?
 - ▶ 73% of iPhone users from iTunes (compared to 43% of non-owners),
 - ▶ 46% of non-owners expect to get it from their cable or satellite company (compared to 37% of iPhone owners).

- ▶ At the top of the surveyed iPhone owners wish list: longer battery life, faster Internet speed!

Challenges

- ▶ Although under constant pressure of becoming bit-pipes providers, operators still own the subscribers, for now.
- ▶ However, model of users buying mobile subscription is changing this. Apple is like becoming an MVNO!! Other handset vendors may follow?
- ▶ Mobile operators with fixed and cable ops are in stronger position...
- ▶ Mobile-only operators are the most challenged and have to be highly innovative to win-maintain subscribers.
- ▶ Mobile-only operators have to work closely with content owners, and have most stake in initiatives like BONDI.
- ▶ Time-shifting and place-shifting implications.

Interpret Survey

- ▶ The survey was conducted online among a representative sample of 1,000 cell phone users, including 200 iPhone owners and 800 non-owners.
 - Survey was conducted last Friday-Tuesday (July 6-10, 2007).
 - Nationally-representative sample of cell phone users ages 13-64.
 - To obtain a representative sample of iPhone owners, potential respondents were randomly chosen from four major online research panels and data was statistically adjusted for survey response bias.
 - iPhone owners had to triple-verify ownership of the device.
 - Non-owners were required to own a working cell phone, have current service, and be the primary/joint decision maker in making new cell phone purchases.
 - US Census estimates were used to insure that the overall sample was representative of all US cell phone users ages 13-64.