



> **The Great Turn on to the Mobile Web**

- > A study into **UK mobile users** and why many are now ready to embrace the **internet on mobile devices**

//

YELL_oCOM mobile™

> Results for real life™

> The Great Turn on to the Mobile Web

- > A study into UK mobile users and why many are now ready to embrace the internet on mobile devices

//

The mobile web has long suffered a poor reputation, tarnished by the over promise of WAP, the lack of mobile optimised sites, slow connection speeds and high data charges.

Today however, the outlook is much more positive: a growing group of consumers is using the mobile web every day for practical and information-seeking tasks, rather than simply for news headlines or football scores – both key drivers of early adoption.

Dubbed the “FUN-ctionals” in a new study by Yell.com mobile, these individuals are fast discovering new internet content and services that can easily be accessed from their mobile phone. And previous sceptics are opening their eyes to the potential of the mobile web and more competitive flat rate pay structures.

With 2007 poised to be the year for mobile applications, particularly mobile search, this study by Yell.com mobile explores the emerging mobile web habits of UK consumers and aims to pinpoint the killer applications that will drive mass uptake within a growing marketplace.

> Methodology

//

Data in this study is taken from a nationwide quantitative survey conducted by ICM interviewing a random sample of 1,052 consumers across the country. A 90 minute qualitative focus group of mobile web users was also carried out.

> The Picture Today

//

- > **Mass adoption is around the corner**
- > Nearly half¹ (49 per cent) of mobile users are interested in trying mobile search in the next few months
- > **Functional applications will drive usage**
- > The majority of consumers (72 per cent) would choose to use mobile web for practical, information services rather than for entertainment reasons
- > **Maps and directions: contextual content is king**
- > 40 per cent of the UK population state that maps, directions and local information are the key features that would encourage them to use mobile search
- > **Mobile search is already happening**
- > Almost a third¹ of mobile search users (31 per cent) have searched in the last month

> 2007: The Year for Mobile Web



Whether it is current mobile web users increasing the amount of time they spend on the mobile web, or potential new users thinking about taking their first plunge, it's apparent that killer applications will be the key adoption drivers for mobile web use.

The Yell.com mobile study asked UK consumers which services would encourage them to use the mobile web. Mobile services such as maps, directions and local information were identified by 40 per cent as having the greatest attraction.

"When I moved to London a couple of months ago I had a complete nightmare – driving around a brand new city, trying to find a shop to deck out my new pad and of course getting totally lost. Now I don't think twice about journeys – I just download directions from Yell.com mobile, text the maps to my equally clueless housemates and set off."

Justin Bates, 20 years old, Graduate

Items that would most encourage consumers to use the web on their mobile phone

1. Maps/directions and local information
2. Email and instant messenger
3. Banking
4. Transport information
5. News and sports clips

With email and instant messenger playing such a key role in our daily lives today, it's perhaps not surprising that such applications will also play an important role in attracting people to the mobile web. More than a third (36 per cent) believe they will be key motivators.

A sixth (16 per cent) of those questioned in the study see banking as an attractive proposition for the mobile web. This is possibly because banking online in general has grown in popularity and security concerns have disappeared as people take advantage of 24/7 access.

> The Turn-Offs

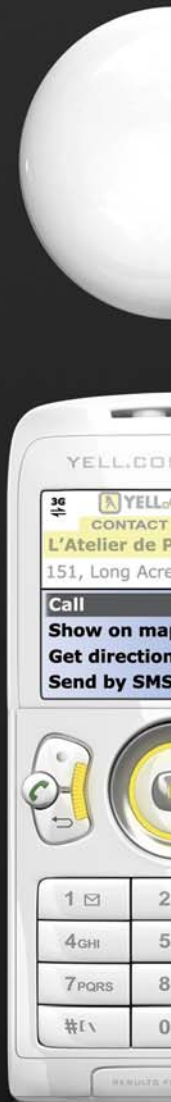


As well as the killer applications, consumers were also asked to identify which services would not encourage them to use the internet on a mobile phone, to draw out any conflicts in usage over general web usage.

While functional applications dominate the top five, it's largely entertainment services that are more likely to put people off adopting mobile web.

Items that would least encourage consumers to use internet on their mobile phone

1. Dating
2. Social networking
3. Magazine and newspaper subscriptions
4. Podcasts
5. Mobile TV



While dating has been a key driver in general web usage, nearly half (44 per cent) of all respondents in the study by Yell.com mobile said this would not be something that would attract them to the mobile web.

Social networking sites such as MySpace and Bebo are already offering deals to mobile users with some predicting that Web 2.0 will be the cornerstone of the mobile web's maturity. However, the report reveals that a quarter (26 per cent) of the UK population think social networking would least encourage them from trying the internet on their phone.

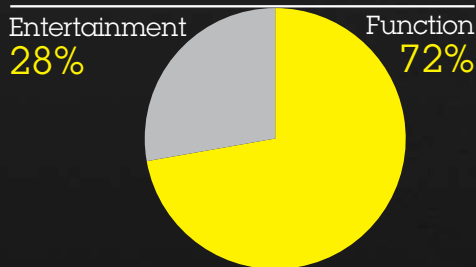
Mobile TV and podcasts are also ranked in the top five "turn-offs", with 17 per cent and 18 per cent respectively saying these applications would not encourage them to access the mobile web.

> Function over Entertainment



The study shows that the overriding appeal for mass mobile web adoption is function. The need for people to access specific information 24/7 when fixed online access is not available is key. It's not that entertainment services will never have a place on mobile web – but that 'need' will fuel initial pick-up.

Figure 1: What would most encourage consumers to use internet on their mobile phone?



> The FUN-ctionals



While more than a third of mobile users have already tried accessing the internet on their phones, can we pinpoint who the early adopters are?

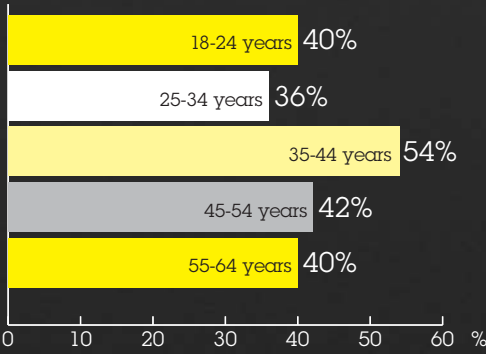
Looking closer at the key drivers for mobile web the clear inference is that, contrary to common perception, those aged between 35-44 will start to use the mobile web more than the 18-24 year olds. Intriguingly, more than half (54 per cent) of 35-44 year olds said maps, directions and local information would attract them to the mobile web, compared with 40 per cent of 18-24 year olds.

Cost as opposed to technical know-how is still the overriding barrier to wider mobile web adoption. Cost is perhaps a key factor in why the 'oldies', with a higher disposable income, are fuelling use over the younger generation who have traditionally led new mobile trends.

"I'm self-employed and am often on the move, trying to get to various meetings across the country. Maps, directions, and local information certainly attract me to the mobile internet."

Vince Haines, 38, Freelance IT Consultant

Figure 2: Potential users of maps, directions and local information



The study examined this notion further, identifying middle aged men to be the true early adopters for mobile search. Far from teens using mobile web to download the latest tracks or share photos on the go, pick-up is being led by self-employed males keen, for example, to check train times and find their nearest DIY store.

The characteristics of the typical FUN-ctional

Male bias/Middle aged/Self employed

Tend not to personalise handsets or web pages

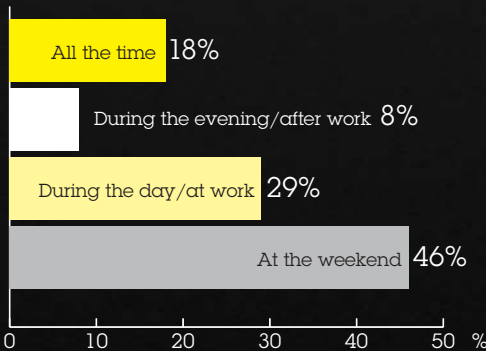
Very functional in their use of the web and mobile web



The 'FUN-ctionals' have a need for the mobile web around the clock. However, it's the weekend that will see the highest usage both out and about or at home, particularly as just over 40 per cent of UK households don't have an internet connectionⁱⁱ. Almost a half (46 per cent) of those who said they'd use the mobile web, cited the weekend as the peak time for use. The study identified a specific need for using mobile search to finding meeting points for friends as well as identifying the best shops, pubs and restaurants to go to.

The working day is also likely to see strong traffic as 29 per cent claimed this to be the key time to access the web using their mobile. People will find a need to navigate to meetings or look up business contact details, particularly when a PC is not an option.

Figure 3: When consumers would use maps, directions and business information on a mobile?

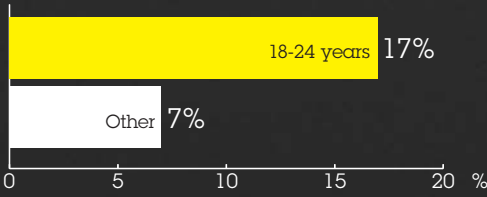


> Mass Appeal



Although FUN-ctionals are leading current growth, it will actually be the younger group of 18-24 year olds that will fuel wider and more frequent adoption in the future. The study found they were more than twice as likely to see themselves accessing the mobile web on a continual basis than any other group. Seventeen per cent of this group said they could see themselves accessing maps, directions and business information all the time in the future.

Figure 4: Age of consumers who expect to use maps and directions all the time



The study also showed that the younger generation would be more open to sharing information with friends over the mobile web. Fifteen per cent would be attracted to mobile web with the likes of Facebook, Bebo and MySpace, compared with a national average of just three per cent.

"I haven't really used the mobile web much to date, but I'm just starting to really get into it. I arranged a party in the pub the other day using Yell.com mobile to find the directions, before posting them on my Facebook. Having the internet in your pocket is too much of a temptation for me to resist!"
Sinead Purcell, 21 years old, Marketing

"Our study shows that consumers are starting to find a need for mobile search in their everyday lives. The FUN-ctionals, who today have fewer concerns over costs and a greater hunger for information 24/7 are key to early adoption, but ultimately it will be the younger generation seeking richer information content to share with friends that will drive mass appeal.

"With the vast majority of active UK mobile handsets already internet-enabledⁱⁱ, there is huge potential to get people using mobile web and mobile search and services. As more advanced handsets become the norm and 3G technology more widely adopted, we can expect more regular users and more applications developed specifically with the mobile web in mind. For now, local information and maps are at the heart of people's needs and the driving force behind mobile search. Key characteristics of the mobile web will be immediacy and proximity and the preferences of consumers clearly reflect this."
Martin Wilson, Head of Yell.com mobile Marketing

- > **Yell.com mobile** is the ultimate mobile local information service, offering phone numbers, addresses, maps and directions for more than two million UK shops and services – for **FREE**. Download the service by texting **mobile** to **80248** or go to **mobile.yell.com/uk** using your mobile.

For more information visit www.yellmobile.com



- > For media enquiries please contact

Eleanor Jones
The red Consultancy
eleanor.jones@redconsultancy.com
020 7025 6570

ⁱFigure taken from Mobile Marketing Association, Mobile Search Consumer Insights Research Report, August 2006

ⁱⁱJupiter Mobile Research Model October 2006

ⁱⁱⁱThe Yell.com mobile service is free from Yell, but standard network charges apply to sent messages, downloading and using the service. We recommend that you contact your operator to ensure you have the best package for using such services. Yell.com mobile operates on most mobile phones and UK networks.

YELL.COMTM, YELL.COM mobileTM and Results for real lifeTM are trademarks of Yell Limited.

YELL_oCOM mobileTM

> Results for real life[™]