

SOLUTION OVERVIEW

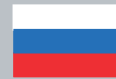
Four of the most populous countries in the world hold the greatest potential for the sale of infrastructure and terminal equipment, as well as mobile data content. Of the roughly 1.05 billion new subscribers that will be added to worldwide mobile networks over the next four years, Pyramid Research estimates that 42% of them will come from the BRIC countries - Brazil, Russia, India and China.

The Mobile Data Adoption Study helps to quantify the market opportunity by assessing current consumer adoption levels and usage patterns for mobile data. Consisting of over 2500 interviews with wireless subscribers across the BRIC region and the U.K., the study gauges current mobile data usage habits, content preferences and propensity to adopt new services. The U.K. data set serves as a benchmark for comparisons against that of a more mature market.

This study provides quantitative market intelligence on mobile data consumption patterns in these pre-3G countries, offering insight into the overall market potential. It helps vendors, mobile operators and content owners accurately size market demand and develop services, pricing and distribution channels to increase mobile data usage with current and future subscribers.



Brazil



Russian Federation



India



China

BENEFITS

The Mobile Data Adoption Study examines the drivers and barriers to the success of new mobile data services, helping vendors and service providers develop the most effective strategies and applications for the BRIC region.

It allows vendors, mobile operators, content owners and the investment community to:

- Size the market opportunity and develop sales and investment forecasts
- Identify the most popular applications and content types
- Assess the potential success of future applications based on psychographic data
- Structure and launch new service deployments
- Conduct detailed customer segmentation to develop targeted messaging
- Plan marketing, advertising and promotional activities
- Assess the most effective price points, service bundles and distribution channels

SURVEY METHODOLOGY

- Over 2,500 responses from mobile subscribers, aged 18 and older
- Equal respondent distribution across Brazil, Russia, India, China and U.K.
- On-line interviews in Brazil, Russia, U.K.
- Face-to-face interviews in China and India:
 - China interview locations: Beijing, Shanghai, Guangzhou
 - India interview locations: Delhi, Mumbai, Chennai, Kolkatta
- 35 questions including demographics and psychographics
- Same localized survey instrument used in each country



Mobile Data Adoption Study

SURVEY TOPICS

Demographics

- Gender
- Age
- Annual income
- Education level

Product Ownership & Purchasing

- Device type & expenditure
- Device point of purchase
- Service plan type & monthly expenditure
- Drivers for switching carriers or devices
- Technology usage & ownership (TV, VCR, DVD, camera, camcorder, portable music players, computers, etc.)

Psychographics & Technology/Media Habits

- Attitudes about technology
- Adoption drivers & barriers
- Content preferences
- Television & music habits
- Internet usage

Wireless Data Usage & Habits

- Wireless internet & email
- Alert services
- Text messaging
- Instant messaging
- Picture/Video messaging
- Ring tone & game downloads
- Graphic/logos Downloads
- Driving directions
- Preferred content types
- Usage characteristics & profiles
- Price elasticity & spending

Propensity to Adopt New Services

- Wireless conferencing
- Mobile TV & content preferences
- Mobile music
- Mobile video phone
- Peoplefinder
- Gambling/adult entertainment services
- Price elasticity for new services
- Adoption drivers & barriers

STANDARD DELIVERABLES

Study results and analysis are available on a per country basis or for the entire BRIC region.

Country level deliverables include:

- Raw data in Excel per country
- Survey questionnaire per country
- Eighty slide data presentation per country

PREMIUM DELIVERABLES

The complete BRIC package includes all four regional data sets and analysis presentations, plus U.K. benchmarking data and the following Premium deliverables:

- In-depth data analysis report including scenario analysis of mobile data adoption and revenue by application.
- Recommendations and analysis on how to approach the BRIC opportunity for vendors, service providers, content owners and the investment community will also be covered.
- Up to three custom cross tabs cut by analysts

