4th July 2008

The Digital Lifestyle

What more do mobile users want?

Contents

Executive Summary

Four years ago, when BuzzCity launched myGamma, “mobile social networking” was not part of the advertising industry's vocabulary. It was a nice but intangible idea. Today, some three million consumers are members of myGamma alone and BuzzCity serves ads on more than 2000 publisher sites in 70+ countries. Mobile social networks and mobile websites are quickly becoming an essential part of any integrated media purchase.

In this report – BuzzCity's second simultaneous multi-country survey – we aim to assist advertisers and publishers by providing insights on what myGamma's members are likely to buy and what milestones they will face over the next year. While demographics change, and we constantly poll our user base to keep our statistics up-to-date, a study of how current users will undergo lifestyle changes can inform advertising decisions for the next twelve months.

Key findings include:

1. “Wireless” consumers are eager to access new services via the mobile internet. In particular, there are excellent opportunities for banks and other providers of financial services.

2. More than half of respondents are likely to look for a new job within the coming year, either because they will graduate from school or are looking to switch employers. (Job Placement services and online Job Banks, take note.)

3. Nearly three-quarters of respondents have made remote purchases (via

mail, phone and internet) and 20% have used their mobile phone to buy something.

4. Books, downloads and virtual gifts are the most popular items purchased.

5. The electronic media – TV, movies, music – is by far the favourite leisure activity of our users. Yet less than four percent of respondents have purchased movie tickets online or via their mobile phones. Either mobile ticketing services are not available or cinemas and ticketing agencies are not doing a good job of getting the word out.

6. A surprisingly high number, 58%, already own or are considering purchasing a personal computer. Yet we know from previous polls that the mobile phone is the primary means of accessing the internet for the majority of myGamma members. Future surveys should further examine why this is the case. One reason may be poor PC internet connectivity.

7. More than half of the survey respondents say they would use their mobile phones for financial services, if such services were available in their country. One-third would like to be able to transfer money. Yet mobile remittance services are already available in many of these markets. Consumers just don't know it. Banks and companies like Western Union need to step up their public education and marketing programmes if consumers are to use their services.

Background

myGamma is the world's largest mobile social networking service. More than three million members from 70+ countries (as of June 2008) interact and form online communities in moblogs, forums, testimonials and games. BuzzCity, a leading developer of global wireless communities and consumer services, initially deployed myGamma in Singapore, Malaysia and Thailand. Today, the service is also available in Africa, Europe, North America and the Middle East. On average, another two countries come online each month.

Advertising constitutes myGamma's primary source of revenue. BuzzCity also serves mobile ads across more than 2000 publisher sites. Over the past year, the number of advertisements delivered across the myGamma Network has grown 730 percent from 340 million ads in the first quarter of 2007 to over 2.5 billion ads in the first quarter of this year.

People who use myGamma generally have limited or no access to the PC-based wired internet. These "unwired" consumers live in emerging markets or work in the blue collar sector in wealthier nations. Mobile phones provide their primary access to the Internet. Widespread and affordable wireless access has helped spark rapid growth in the number of people using the wireless Internet and the amount of time they spend on it.

myGamma members must be at least 18 years old. Currently, 61 percent of the myGamma population is aged 20 – 29. Approximately one-third are female (up from 26 percent last year). Nokia phones are the surfing tool of choice (71%) followed by Sony Ericsson and Motorola (12 percent each) and Samsung (5 percent).

BuzzCity originally conceptualized myGamma as a messaging tool for WAP media on mobile devices. The service has evolved to include community centric tools (discussion groups, blogs, photo albums etc) and in-session games and activities. Like other social networks, members interact via personal profiles, in games and chat rooms. Profile pages contain biographical information, friends' lists and postings.

Registered members enjoy full use of the service. They can create wap sites, comment on each other's photos and blogs, join or start a discussion forum and play in-session games like Gammalife. Visitors meanwhile have more limited browsing access. They can view member-created wap sites, the Hall of Fame (a weekly picture voting activity) and portions of member-created discussion groups.

BuzzCity is committed to providing services that are relevant to myGamma's members and their lifestyles. This is particularly important as myGamma grows in existing markets and expands to new ones.

Objectives

The primary objective of this ten country survey is to understand the genres of products and services that will best meet the needs and interests of myGamma members over the next twelve months.

By surveying members' current spending patterns and upcoming life milestones, mobile web developers and advertisers can design more relevant WAP sites as well as products, services and promotional offers that suit the lifestyle needs of mobile internet users.

This is the second simultaneous multi-market survey conducted by BuzzCity. In addition to observing international trends, the survey results also invite direct comparisons between markets.

Survey Methodology

The survey was kept short to cater to the media of choice, the mobile internet. Participants were asked eight questions: seven multiple choice plus one open-ended response.

The survey was conducted from May to June 2008 in 10 countries representing very different geographic regions: Americas, Asia, Africa, Eastern Europe and the Middle East. We wanted to include a Western European country, the United Kingdom, but did not receive enough responses.

Five countries – India, South Africa, Kenya, the United States and Tanzania – were chosen because they are among the top ten traffic generating markets worldwide. The top four are also particularly popular among advertisers. The next four countries – Romania, Egypt, Nigeria and Thailand – were chosen because they are among the second ten most traffic generating markets. Sudan, which is an up-and-coming market and was #37 in BuzzCity's Mobile Advertising Index (Q1-08), rounds out the list of countries in the survey.

Thailand meanwhile also represents a long established market and together with South Africa presents a common known baseline of steady growth and heavy user participation with well observed usage patterns.

We would have liked to include Indonesia in the survey as the country generates the highest advertiser traffic across our network. Indonesia also ranks among the top markets for new myGamma member registrations. However during the period of the survey, the Indonesian telecom network was unstable. Telecom companies there have drastically cut rates to attract new users. The strategy worked, but the network was overloaded, which meant that it could be difficult to access mobile internet sites. Some voice calls were also not being connected. More recently, the network infrastructure appears to be improving, so BuzzCity is planning to survey Indonesian mobile surfers later this month.

The following table shows the countries where the survey was conducted, listed in order of traffic size in May 2008.

	Country	Total
1	IN	231,926,841
2	ZA	191,774,896
3	KE	72,866,758
4	US	64,369,597
5	TZ	38,388,851
6	RO	24,559,092
7	EG	18,353,755
8	NG	16,142,914
9	TH	12,179,405
10	SD	3,169,521
	Total	673,731,630

Text banners placed on various myGamma pages publicized the survey to members. When clicked, the banner ads directed users to the survey questionnaire. To minimize intrusion, the advertising server was set to ensure that a member saw the ad no more than five times.

Only myGamma members could participate. 1135 myGamma members responded to the survey. Each respondent was allowed a single response. Survey participants were entered into a lucky draw with the chance to win G$5000 (first prize), G$2000 (second prize) and G$1000 (third prize)*. Three winners were chosen in each country.

The final results reported in this survey report are a mix of quantitative data and qualitative analysis, including informal semi-structured interviews, member feedback sent to Customer Service personnel and results from previous lifestyle surveys. Where possible, survey data was also corroborated with data from myGamma's servers.

*Gamma Dollars, or G$, are myGamma currency in the virtual game, GammaLife. Gamma Dollars can be redeemed for virtual items or remitted to other players, but only within a country, as the real value varies from one market to another.

Survey Results

Which of the following leisure activities do you enjoy?

As the mobile internet becomes increasingly important to users in their everyday lives, we wondered whether traditional leisure activities might be affected. Many mobile services, after all, are basically entertainment or consumer centric activities.

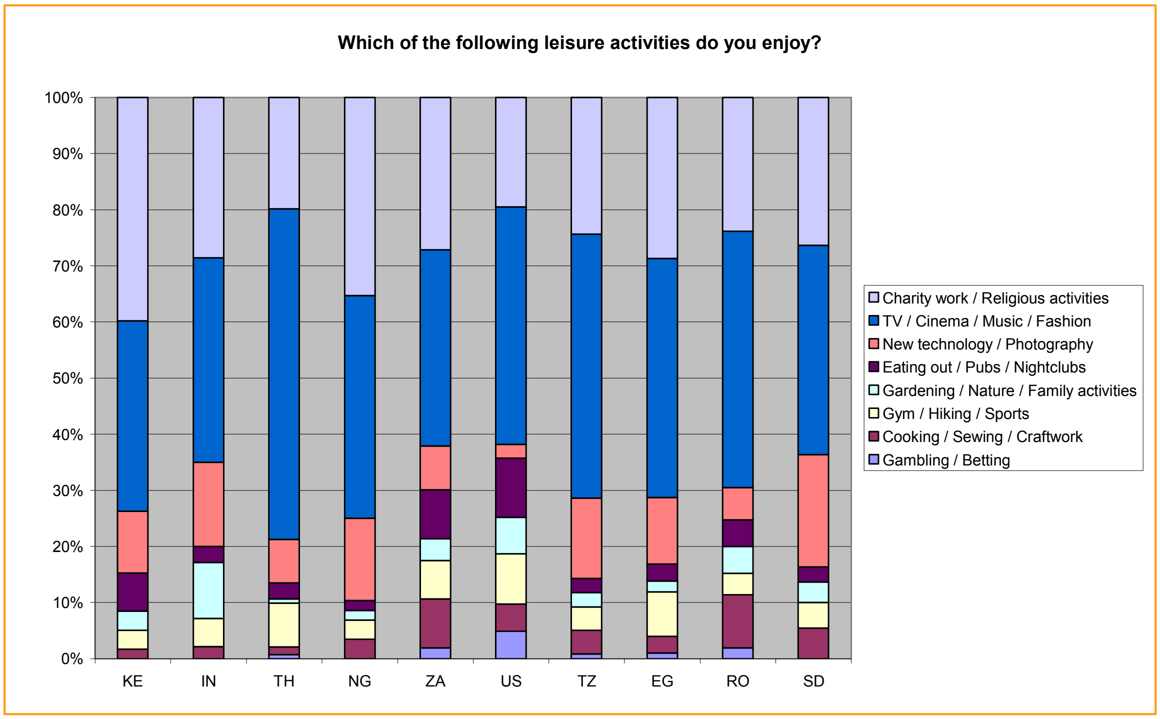

Chart 1

We also included an option in this multiple choice question for charity and religion. While these are arguably not "leisure activities", they do not usually constitute paid work. Our prior knowledge of user behavior and passions led us to suspect that many myGamma members spend significant amounts of time helping others or in prayer and sure enough 27 percent chose this option. In fact, it was the second most popular response behind the media (cinema, fashion, music and TV), which garnered 42 percent.

Across the network 19% of users were engaged in participative leisure activities

i.	Gym / Hiking / Sports	5.59 %
ii.	Eating out / Pubs / Nightclubs	4.65 %
iii.	Cooking / Sewing / Craftwork	4.45 %
iv.	Gardening / Nature / Family activities	3.91 %

Few respondents chose gambling/betting, though nearly five percent of US respondents chose this option and about two percent each in Romania and South Africa. The low numbers provide a contrast to the popularity of mobile online gambling.

Which of the following do you plan to do in the next 6 or 12 months?

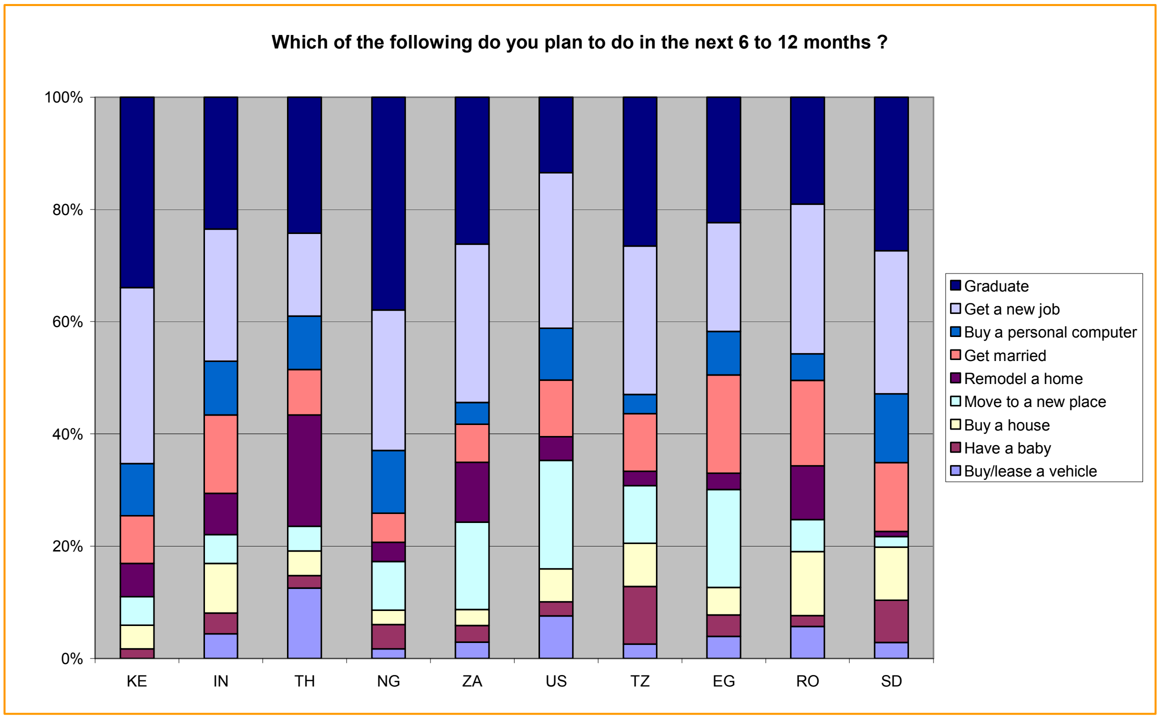

Chart 2

One-quarter of respondents expect to graduate within the next year; another 25 percent will get a new job. So, in total, half of survey respondents are looking for work. This is good news for recruiters and placement agencies.

The percentage of users expecting to graduate in Africa is the highest - Nigeria 38%, Kenya 34%, Sudan 27%, South Africa 26% and Tanzania 26%. Romania (19%) and the USA (14%) scored below the network average, perhaps because more students in these countries use PC-based social network services.

myGamma users are expecting other significant life milestones in the year ahead as well. About fifteen percent of respondents will buy a house or move to a new place; another ten percent expect to marry.

Looks like our users in Kenya, Nigeria, South Africa and Thailand either enjoy being single or find it too difficult to get married. The response rate for getting married this year was well below the network average in these countries.

A significant number of users meanwhile expect to buy a personal computer in the coming year. Surprisingly this percentage is highest in Sudan, which is the least economically developed country among those surveyed. Twelve percent of respondents there expect to buy a PC. Some eleven percent of Nigerian survey participants are also expecting to purchase a computer.

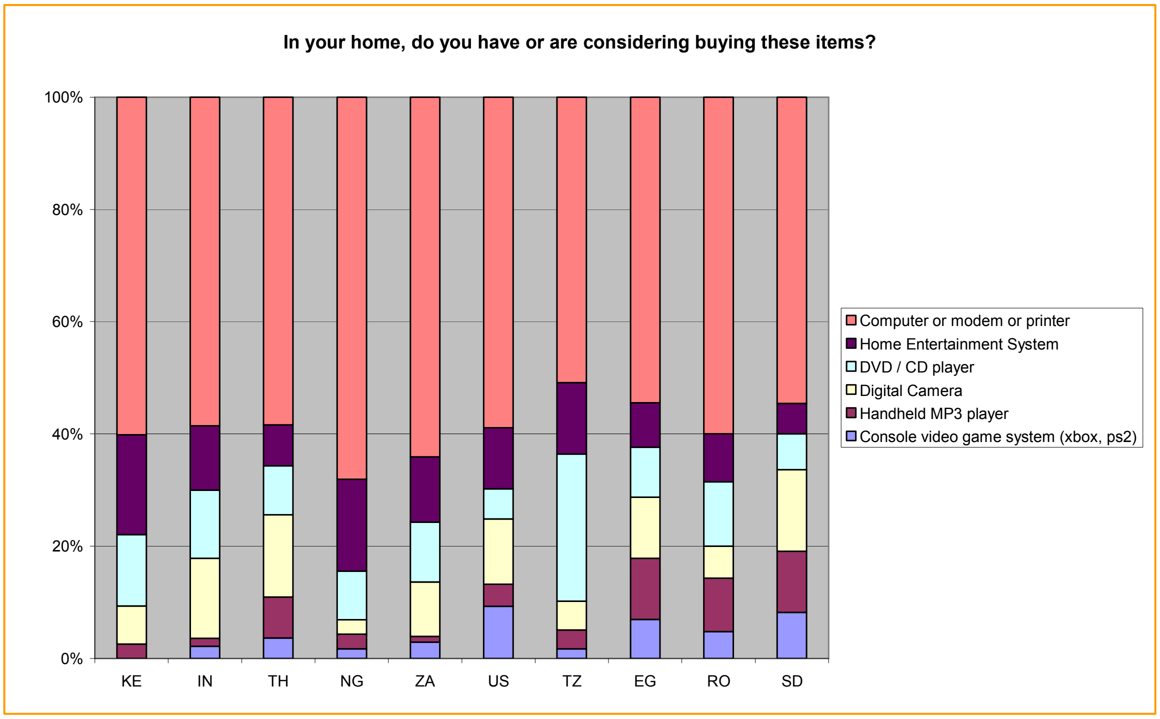

Chart 3

In your home, do you have or are considering buying these items?

myGamma members like the digital lifestyle. In addition to mobile phones, most respondents own or would like to buy a computer (59%), home entertainment system or CD/DVD player (11 percent each).

Nearly ten percent also own or are considering buying a digital camera. Approximately 15 percent of respondents in India, Sudan and Thailand own or would like to purchase a camera. We find this result to be surprisingly high considering that most mobile phones now have built-in cameras. This could demonstrate that mobile surfers appreciate having different devices for different functions or that they do not mind owning devices with overlapping functionality.

Have you bought goods or services via mail, telephone, internet or mobile before?

We wanted to see how comfortable members are with remote transactions and gauge their eventual propensity for mobile internet purchases.

The comfort level with long-distance commerce is definitely there. Nearly three-quarters of respondents have bought goods by internet, mobile, post or telephone. And among those who answered "yes", more than half have made an electronic purchase. Some 28 percent have already used their mobile phones to make a purchase.

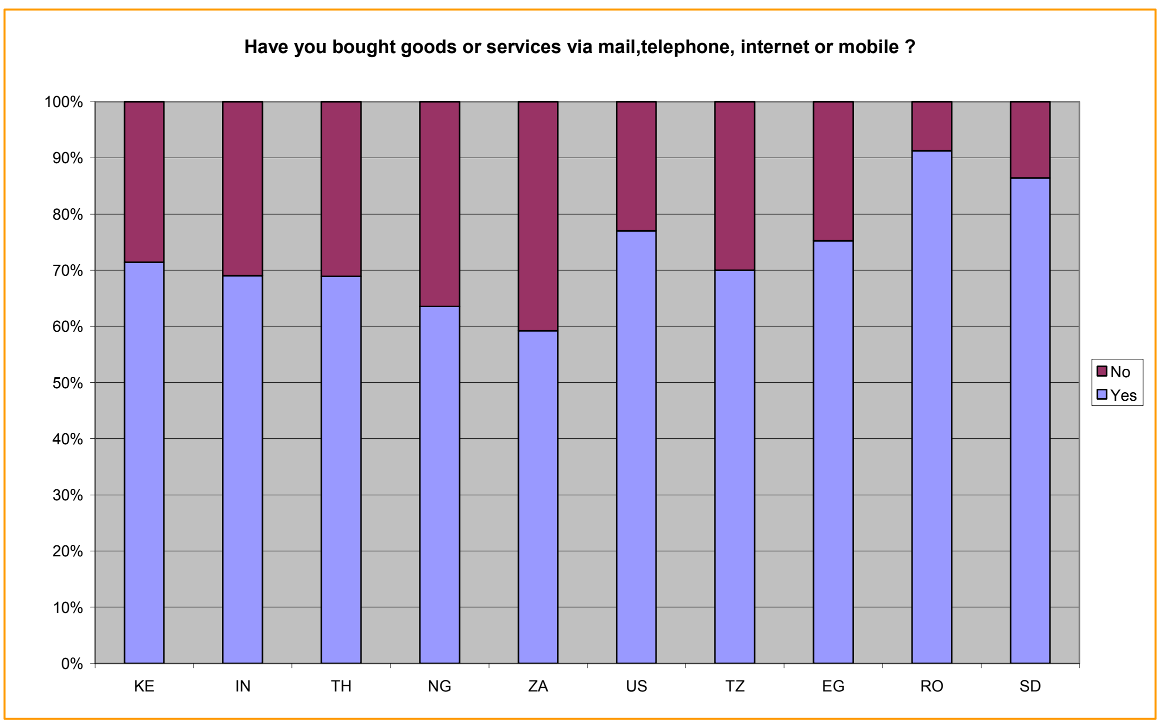

Chart 4

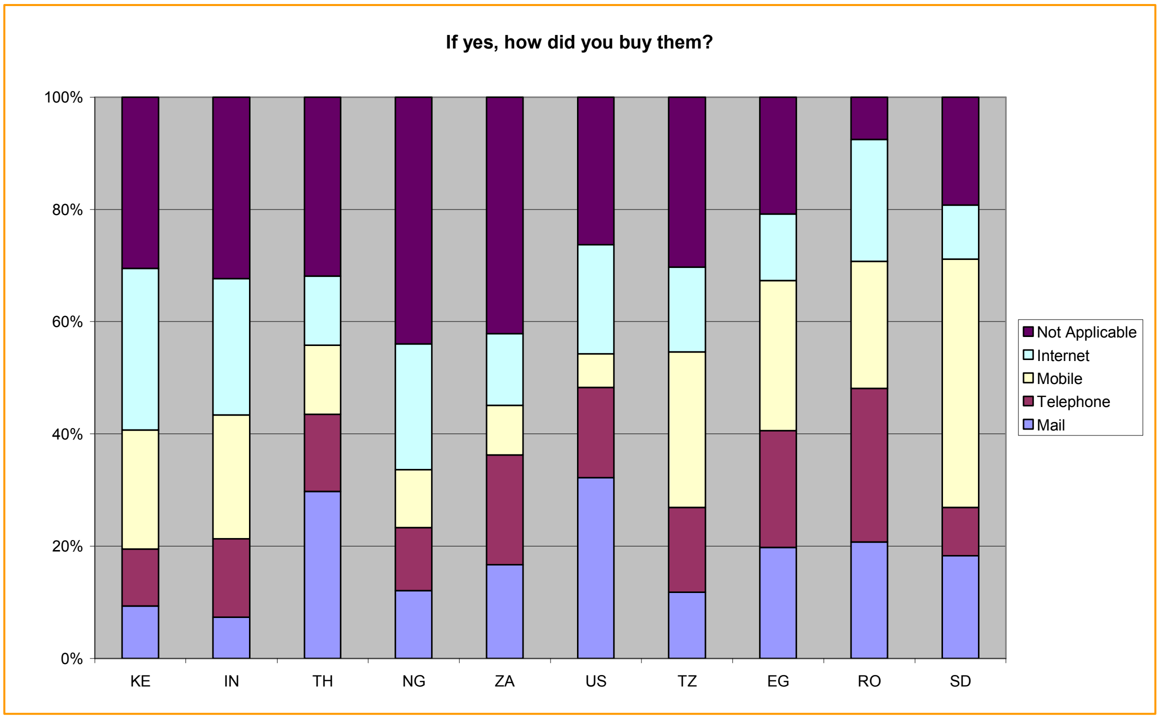

Chart 5

If yes, how did you buy them?

Of the electronic purchases, 20 percent have made mobile specific purchases, while 18 percent made Internet purchases and 16 percent bought via telephone.

It's worth noting that in a previous survey, 35 percent of respondents said they had made a purchase online. The reason for the difference in the two surveys could be the way in which the question in this survey was worded. Respondents had a choice of “mail”, “telephone”, “mobile”, “internet” and “not applicable”. While a respondent could have chosen more than one answer, most only chose one. It's likely though that many consumers have used more than one medium to make a remote purchase.

Which of these have you bought through mail, telephone, internet or mobile?

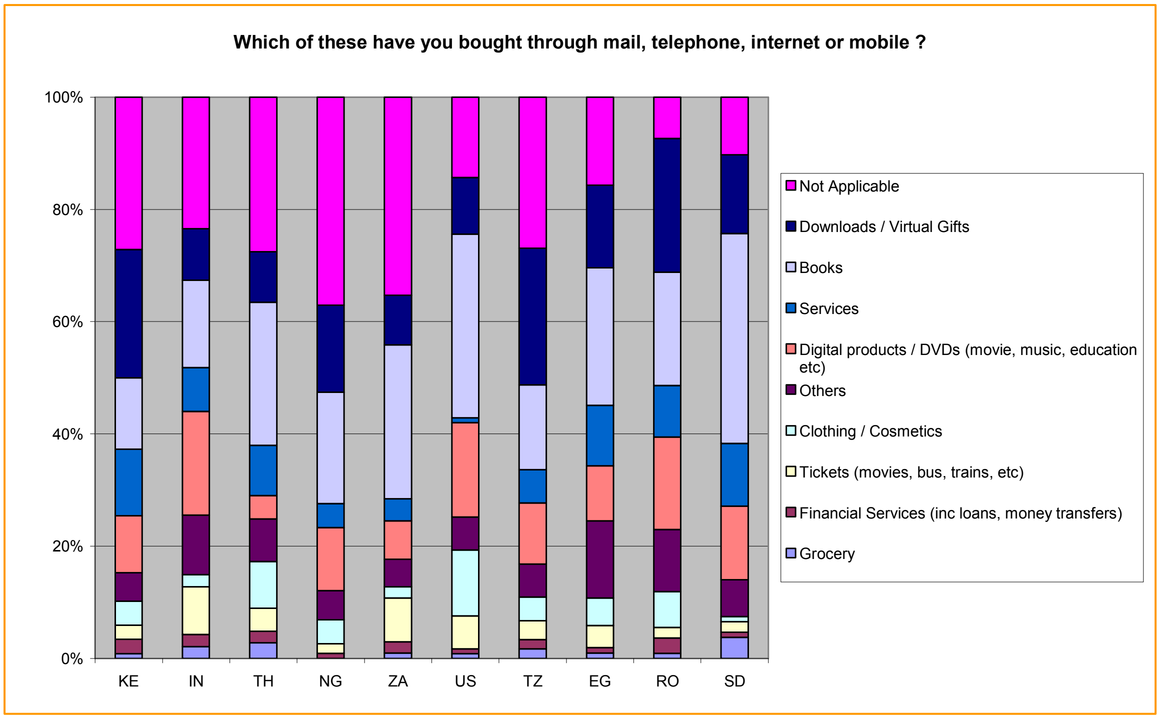

Chart 6

The most popularly purchased remote item is books. About one-quarter of respondents who say they've bought an item by post, internet, telephone or mobile have bought books. The highest response rate comes from Sudan, a country which is tied with India for the lowest literacy rate among the countries surveyed. (Both countries have a 61 percent adult literacy rate.) In Sudan 37 percent of respondents said they have bought books via a remote transaction; in India the percentage is just 15 percent. Perhaps in Sudan, there's a lack of book stores, so those people who can read must purchase from afar. The country with the second highest response rate for books is the USA, where the market for online sales is well developed through sites like Amazon and Barnes & Noble.

The second most popular remote purchase is downloads. In Kenya, Romania and Tanzania more than 20 percent of respondents have purchased a downloadable item, like virtual gifts or games. In each of these countries, more people bought downloads than books.

Digital products came in third (12%) with above average responses recorded in India (18%), US (17%), Romania (17%) & Sudan (13). Taken together, Digital Products and Downloads make up the largest group of purchases, which indicates that a lot of our members are becoming very comfortable with the digital lifestyle.

In the US, Books (33%), Digital products (17%) and Clothing & Cosmetics (12%) are the top 3 items.

While less than 5 percent of respondents across the network have bought clothing and cosmetics remotely, members from the USA (12%), Thailand (8%) & Romania (6%) were among the top 3 in this area.

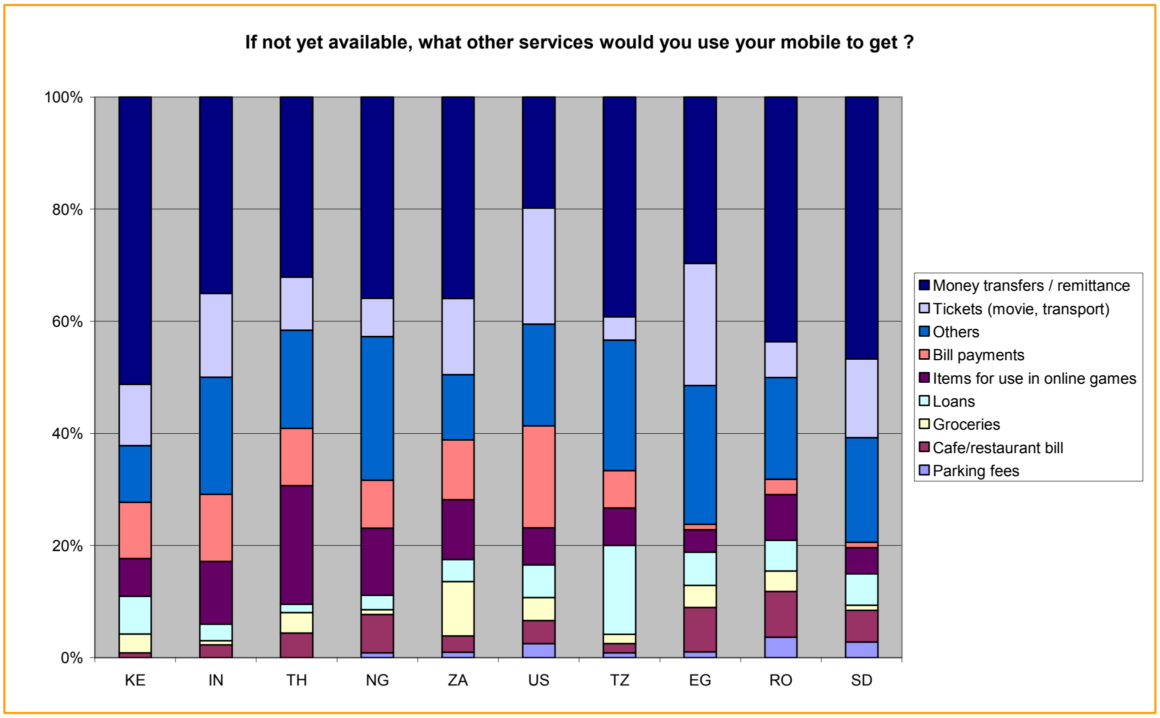

Chart 7

If not yet available, what other services would you use your mobile to get?

MyGamma members are clearly open to using their mobile phones for a variety of new services, including financial transactions. Half of all respondents want to be able to transfer money, take/make loans or pay bills.

At 37 percent, money transfers and remittances is by far the most desired service.

What's particularly interesting about this response is that in many of the countries surveyed, mobile remittance services are already available. Our users just don't know about them. Better consumer education is definitely needed. In some cases, there may also be distrust of current mobile financial services. In these instances, providers need to reassure and educate the public about the security measures which are in place.

Of the nine multiple choice responses listed in this question, the second most popular response was “Others” (19%). For the remote services question above, less than half as many respondents chose “others”. This seems to indicate that there is a strong thirst for more services and our list was far from exhaustive.

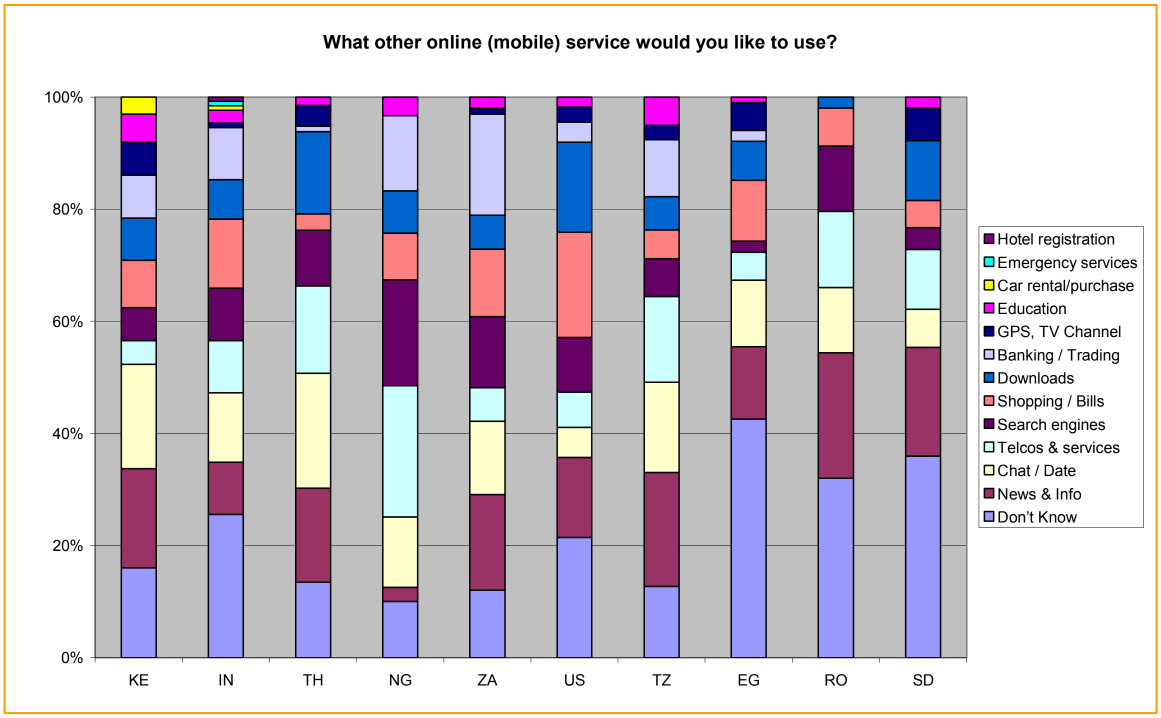

Chart 8

What other online (mobile) services would you like to use?

This was an open-ended question. Responses are varied and grouped in major categories. In particular, this question provided an opportunity to the 19% of respondents who answered "Others" in Question 7 to expand on the types of mobile services they would like to see.

1. Users clearly want to surf more. Some 15 percent of respondents replied that they would like more news and information services. An additional nine percent want more search functionality.
2. Making connections with others -- through chat and dating services – is again a popular choice (13%), underscoring the networking nature of the mobile internet.
3. Across the survey, 11 percent of users want more services from their

carriers. A number of respondents with pre-paid cards have requested top up / recharge services via mobile.

4. Shopping. This was the most popular choice in the USA (behind people who weren't sure what to choose) with nearly one in five respondents requesting the capability to use mobile phones to make purchases and pay bills. More than ten percent of respondents in Egypt, India and South Africa also listed shopping as a desired service.
5. Demand for downloads – particularly music and videos – is highest in the USA and Thailand (16 percent and 15 percent, respectively.) Given the context of the survey, we expect users are prepared to pay for the downloaded items.
6. Enhanced Banking Services, like share trading and foreign exchange. This was the most popular response in South Africa (18%) and received significant votes in India, Nigeria and Tanzania (9%, 14% and 11% respectively).

Country Profiles

Egypt

1. The most popular leisure activity, by far, among our Egyptian members is TV, cinema, music and fashion. 43 percent of Egyptian respondents chose this answer, just about the same as the network average. 29 percent are engaged in charity and religious activities, 16 percent enjoy participative leisure activities like sports and eating out.

2. Twenty-two percent expect to graduate within the next six to twelve months. Nineteen percent expect to get a new job. 18 percent expect to get married (vs 11% average) and 18% plan to move to a new place (vs 9% average).

3. More than half of Egyptian respondents own or are considering purchasing a computer, printer or modem. Handheld MP3 players and digital cameras were the second most popular replies (11% each).

4. Seventy-five percent have made remote purchases, mainly via mobiles (27%), telephone (21%) and mail (20%).

5. The top three purchases are books (25%), downloads (15%) and services (11%).

6. Nearly one-third of Egyptian respondents would like to use their mobiles for money transfers (30%). There's also a strong demand

for ticketing services (22% vs 12% network average) and being able to pay café / restaurant bills (8%).

7. What else are they looking for?

	%
News & Info	12.87
Chat / Date	11.88
Telcos & services	4.95
Search engines	1.98
Shopping / Bills	10.89
Downloads	6.93
Banking / Trading	1.98

India

1. Keeping with the global trend, the most popular leisure activity among our Indian members is TV, cinema, music and fashion. Thirty six percent of Indian respondents chose this option, about five percentage points lower than the network average.

2. Twenty-nine percent of Indian respondents chose charity work/religious activities as a preferred non-work activity. We note that a lot of Indian members also post *puja*[1] images of Hindu gods in their profile pages.

3. About one-quarter of Indian respondents will graduate from school in the next six to twelve months. Another quarter expects to get a new job. Fourteen percent expect to marry.

4. The top three items on our Indian members' digital lifestyle list are computers (and peripherals), digital cameras and DVD / CD players.

5. Sixty-nine percent of Indians have made a ‘remote’ purchase. Twenty-four percent have used the Internet, 22 percent mobile devices. In both cases, this is above the network average (17% internet buys, 20% by mobiles.)

6. Indian users are more likely to purchase digital items remotely (18%), less likely to buy books (16%) as compared with other

[1] Devotional offering to a Hindu or Buddhist deity

countries in the survey.

7. Although buying tickets (9%) is 5th amongst their purchases, Indians are twice as likely (4% survey average) than others to make ticket purchases.

8. Indians would like to use their mobiles to transfer money (35%), buy tickets (15%) and pay bills (12%).

9. India has a long history of train travel and today it's common for travelers to purchase tickets online. Given the widespread use of mobiles in India, we're not surprised to see demand for purchasing tickets by mobile.

10. What more do they want in India?

	%
News & Info	9.30
Chat / Date	12.40
Telcos & services	9.30
Search engines	9.30
Shopping / Bills	12.40
Downloads	6.98
Banking / Trading	9.30

Kenya

1. Kenya is the only country surveyed where charity work and religious activities ranks as the number one leisure activity. Nearly forty percent of Kenyan respondents chose this answer. TV/ Cinema/ Music / Fashion is in second place with 34 percent.

2. More than 65 percent expect to graduate or get a new job within the coming year. This is about fifteen percentage points above the survey average. Of the ten countries surveyed, Kenyan myGamma members are the most interested in switching jobs and the second most likely to graduate school (behind Nigeria).

3. Nine percent of respondents say they will buy a computer within the next year. However, sixty percent say they already own or are considering buying a PC or PC accessories.

4. Seventy-one percent of Kenyan respondents have made remote purchases – 29 percent on the Internet and 22 percent via mobiles (vs network averages of 18% and 21% respectively). Purchases via mobiles are most likely for mobile downloads.

5. Based on previous survey data, it appears that m-commerce is becoming more accepted in Kenya. In our last survey, some 86 percent of Kenyan respondents had never bought an item using a mobile device. Now, at least 22 percent have made a mobile purchase.

6. The top three remote purchases are downloads/virtual gifts (23%) books (13%) and services (12%). The purchase of books is quite low (13%) as compared with the network average (23%).

7. There appears to be little interest in video games consoles.

8. The three things Kenyans would like to do with their mobiles (that are not yet available) are money transfers (51%), buy tickets (11%) and pay bills (11%).

9. What more do they want in Kenya?

	%
News & Info	17.65
Chat / Date	18.49
Telcos & services	4.20
Search engines	5.88
Shopping / Bills	8.40
Downloads	7.56
Banking / Trading	7.56

Nigeria

1. Again the spectator entertainments (TV, cinema, etc 40%) and charity work/religious activities (35%) dominate members' time outside of work. New technology and photography ranks third among user activities (15%).

2. Thirty-eight percent expect to graduate in the coming year. Another 25 percent plan to get a new job. Nine percent are likely to move to a new place.

3. Sixty-eight percent own or are considering buying a personal computer. This is ten points above the network average. Sixteen percent have or are considering buying a home entertainment system. Again, this is above the network average.

4. Sixty-four percent of Nigerian respondents have made remote purchases. This is nearly ten percentage points below the average. But there are signs that e-commerce is on the rise. Twenty-two percent of Nigerian respondents say they've bought something over the internet, up from 16 percent in a previous survey.

5. The top three remote purchases are books (20%), downloads (15%) and digital products (11%).

6. The top three services Nigerians want to get with their mobiles are money transfers (37%), items for use in online games (12%) and bill payments (9%).

7. What more do they want in Nigeria?

	%
News & Info	2.56
Chat / Date	12.82
Telcos & services	23.93
Search engines	19.33
Shopping / Bills	8.55
Downloads	7.69
Banking / Trading	13.68

Romania

1. At 46 percent, the most popular leisure activity among Romanian respondents is TV/cinema/music/fashion. Charity and religious activities ranks second (24%).

2. Within one year, 26 percent of Romanian respondents expect to get a new job. Nineteen percent expect to graduate. Fifteen percent plan to get married; twelve percent to buy a house.

3. Sixty percent of respondents own or are considering buying a computer, modem or printer. DVD/CD players and MP3 players rank second and third (11% and 9.5% respectively.)

4. Ninety-one percent have made remote purchases (far above the 73% average). Romanians use all of the available remote purchase tools in almost equal measure: mail (20%), mobile (23%), internet (21%) and telephone (27%).

5. Their top three remote purchases are downloads (24%), books (20%) and digital products (17%). Worthy of note are purchases of Clothing/cosmetics 6% (slightly above the 5% average) and tickets 2% (below the 4% average).

6. The top three services Romanians would like to use their mobiles for are money transfers (44%), items for online games (8%) and café bills (8%).

7. What more do they want in Romania?

	%
News & Info	22.33
Chat / Date	11.65
Telcos & services	13.60
Search engines	11.65
Shopping / Bills	6.80
Downloads	1.94
Banking / Trading	0.00

South Africa

1. Again the spectator entertainments (TV, cinema etc 35%) and charity work / religious activities (27%) dominate members' time outside of work.

2. South Africans particularly like participative activities (28% vs 19% network average).

3. Twenty-six percent expect to graduate soon and 28 percent are planning to get a new job. Sixteen percent are moving to a new place (vs 9% average) and 11 percent are planning to remodel their homes (vs 7% average).

4. South African respondents showed a markedly low interest in MP3 players. Just one percent says they own or are considering buying one.

5. Sixty-four percent own or are considering buying a computer, printer or modem.

6. Only sixty percent have made remote purchases, the lowest rate among the countries surveyed. The primary tools for these purchases are the telephone and mail. Of those who have made a remote purchase, fifteen percent did it via mobile.

7. The top three remote purchases are books (28%), tickets (8%) and digital products (7%).

8. The top services South Africans would like to use their mobiles for are money transfers (36%), tickets (14%), items for online games and bill payments (11% each).

9. What more do they want in South Africa?

	%
News & Info	17.00
Chat / Date	13.00
Telcos & services	6.00
Search engines	12.62
Shopping / Bills	12.00
Downloads	6.00
Banking / Trading	18.00

Sudan

1. The most popular leisure activists among Sudanese myGamma members are TV, cinema, etc (37%) and charity/religious activities (26%). Of the ten countries surveyed, Sudan had the highest response rate for New Technology and Photography (20%).

2. Within the year, 27 percent of Sudanese respondents expect to graduate. Twenty six percent plan to get a new job. Twelve percent expect to get married and equal percentages say they will buy a computer. After Romania, Sudan had the second highest response rate for buying a house (9%) and after Tanzania; Sudan had the second highest response rate for having a baby (8%).

3. Fifty-five percent of Sudanese respondents own or are considering buying a personal computer. Sudan has the highest response rate for people who own or are considering buying a MP3 player (11%).

4. Eighty-six percent have made remote purchases (one of the highest rates of countries surveyed.)

5. Sudan has the highest response rate – by far – for respondents who say they have engaged in m-commerce. Forty-four percent of Sudanese surveyed say they have made a purchase with a mobile phone, more than twice the network average.

6. The top three remote purchases are books (37%), downloads (14%) and digital products (13%).

7. The top services Sudanese would like to use their mobiles for are money transfers (47%), tickets (14%), café bills and loans (6% each).

8. What more do they want in the Sudan?

	%
News & Info	19.42
Chat / Date	6.80
Telcos & services	10.68
Search engines	3.88
Shopping / Bills	4.85
Downloads	10.68
Banking / Trading	0.00

Tanzania

1. More users in Tanzania (47%) chose TV, cinema, music and fashion as their preferred leisure activity than in any other country. In second place is charity/religious activities (24%) followed by new technology/photography (14%). Only thirteen percent of respondents chose participatory activities.

2. Within one year, 26 percent expect to graduate and another 26 percent expect to get a new job. An equal number of respondents are expecting to get married, have a baby or move to a new place (10% each).

3. More than half of respondents own or are considering buying a personal computer. Twenty-six percent own or might buy a DVD/CD player; thirteen percent chose "home entertainment system" as their answer to this question.

4. Seventy percent of Tanzanians have made remote purchases. Twenty-seven percent have used their phone to make a purchase, seven percentage points above the network average.

5. The top three remote purchases are downloads/virtual gifts (24%), books (15%) and digital products (11%).

6. The top services Tanzanians would like to use their mobiles for are money transfers (39%), loans (16%), bill payments and items for online games (7% each).

7. What more do they want in Tanzania?

	%
News & Info	20.33
Chat / Date	16.10
Telcos & services	15.25
Search engines	6.78
Shopping / Bills	5.08
Downloads	5.93
Banking / Trading	10.17

Thailand

1. Among the ten countries, we had the highest number of respondents in Thailand (135).

2. More Thai respondents chose TV/cinema/music/fashion as their prefered leisure activity than in any other country (59% in Thailand v. 42% network average).

3. In the next year, 25 percent of Thai respondents expect to graduate, 20 percent are planning to remodel their homes, 15 percent are likely to get a new job and 12 percent are likely to buy a car.

4. The percentage of Thai respondents who own or are considering buying a personal computer is consistent with the survey average (58%). Almost fifteen percent own or are considering buying a digital camera (the highest response rate for this item among the countries surveyed.)

5. Sixty-nine percent have made remote purchases. Thirty percent have bought via the post. Only 12 percent chose the internet in response to Question Five, but in a previous survey, 73 percent of Thai respondents said they had purchased an item online. The discrepancy here could be because respondents could only choose one response, yet they could have made remote purchases via several different vehicles.

6. The top three remote purchases are books (26%), downloads (9%)

and services (9%). Eight percent of respondents have bought clothing and cosmetics remotely, three points above the network average.

7. The top services Thais want to get with their mobiles are money transfers (32%), items for online games[2] (21%), bill payments and tickets (10% each). The percentage choosing online games is more than double the network average.

8. What more do they want in Thailand?

	%
News & Info	16.67
Chat / Date	20.48
Telcos & services	15.51
Search engines	9.89
Shopping / Bills	2.87
Downloads	14.62
Banking / Trading	1.00

2 GammaLife items

United States

1. Spectator entertainment (TV, cinema, etc) is the most popular leisure time activity among US myGamma members – 42 percent, in line with the network average – but Americans are also among the most active of myGamma users. Over 30 percent engage in participative activities like sports and eating out. Twenty percent of respondents chose charity work/religious activies, nearly eight percentage points below the network average.

2. Within the next six to twelve months, 28 percent are likely to get a new job, 19% move to a new place and 13% graduate from school.

3. Members exhibit an all round digital lifestyle (video game system, MP3 player, Digital Camera, DVD / CD player, Home Entertainment System, Computer or modem or printer) though ownership/planned ownership of a computer (or peripherals) is high on the agenda for 59% of respondents.

4. Seventy-seven percent of US respondents have made remote purchases – 32% via mail, 20% via internet and 16% via telephone. Only 6% have made mobile purchases (vs 20% avg).

5. The top three remote purchases are books (33%), digital products (17%) and clothing / cosmetics (12%). More US users have bought clothing and cosmetics over the phone, online, etc than in any other country surveyed (12% v. 5% network average).

6. The top services US users want to use their mobiles for are money transfers (20%), tickets (21%) and bill payments (18%).

7. What more do they want in the United States?

	%
News & Info	14.29
Chat / Date	5.36
Telcos & services	6.25
Search engines	9.82
Shopping / Bills	18.75
Downloads	16.07
Banking / Trading	3.57

Conclusions / Recommendations

While this survey was conducted across a variety of markets – in Africa, Asia, Eastern Europe & North America – there are a number of trends that are consistent across the network:

1. Survey respondents clearly want to be able to do more with their mobile phones. From m-commerce to mobile banking, the demand for services is clear.
2. Consumer education in many cases is lacking, though. This is a key area that needs improvement across markets and sectors.
3. Take the case of financial services. Many carriers offer m-banking and bill payment services, but 37 percent of respondents who would like to use these services, do not think they are available yet. M-Pesa may be famous in professional circles, but more than half of Kenyan respondents think it's not possible to make mobile remittances. The same is true for Western Union in the USA, ICICI, Barclays and HDFC banks in India and mPay and True Money in Thailand.
4. More than half of survey respondents have made an electronic purchase. Add in traditional mail and 72 percent of respondents have made purchases 'remotely'. This augurs well for m-commerce & e-commerce as it suggests the presence of a reliable logistics framework and the inherent consumer trust needed to make it all work, as well as the required enabling tools and technology.

5. Ticketing services are also available but again require better exposure as there is definite demand from users.
6. Consumers want more news, information and search capability.
7. A high percentage of respondents – nearly 60 percent – own or would like to own a personal computer. This is higher than previously expected. We can expect interesting usage patterns to emerge in the near future as users adapt to various stationary and mobile (ie moving) modes of Internet use. And we see from the demand for digital cameras that many respondents own or would like to own devices with overlapping capabilities.
8. As with previous surveys, virtual gifts & items for online games are a significant recurring item of interest.
9. Most myGamma users are likely to face a significant life milestone within the next twelve years. The high percentages of users looking for new jobs, either because they will graduate from school or plan to leave their current company, presents a good opportunity for job placement services and classified ads.

Recommendations

1. Step up consumer education of m-banking and m-commerce services. Go beyond the traditional media. Educate users about the availability of m-banking and online ticketing services.
2. Enable consumers to pay for top-up cards with their mobile phones.
3. m-banking should include a “Donations” capability.
4. Job placement services and Classified Ads must go mobile.

5. Develop and offer mobile widgets and feeds that make content consumption easy and accessible.

About BuzzCity

BuzzCity is a developer of global wireless communities and consumer services. Established in 1999 in Singapore, BuzzCity today operates the world's largest wireless community - mygamma.com - for two distinct audiences: the newly connected emerging middle class in developing markets and the blue collar sector in developed regions. These "unwired" consumers are accessing the mobile Internet on their phones due to widespread and affordable wireless access.

BuzzCity provides marketers with unprecedented opportunities to reach this audience via its far-reaching advertising, merchant and publisher programs. Additional information can be found at www.buzzcity.com. Form more details about the survey, please contact feedback@buzzcity.com .