

WHO USES THE MOBILE INTERNET?

And what do they do?

Contents

Executive Summary	3
1. Background.....	6
2. Objectives	7
3. Survey Methodology	8
4. Survey Results.....	11
What do you use mobile internet sites for?	11
How often do you visit mobile internet sites / services?	13
How long is one session?	15
Where are you when you access mobile sites?	17
What time of day do you go online?.....	19
If not yet available, what would you use your mobile to get?	20
What you are most likely to buy for your self in the next 12 months?	21
Which of the following activities do you enjoy?	22
What is your highest education level?	24
What is your monthly income?.....	25
What do you do for a living?	26
Demographics.....	28
5. Country Profiles	30
Brunei	30
Egypt	33
Indonesia	36



Contents (cont'd)

India.....	39
Kenya	42
Libya.....	45
Nigeria	48
Philippines	51
Pakistan.....	54
Romania	57
Thailand.....	59
Tanzania.....	62
United States of America	65
South Africa	68
6. Conclusions / Recommendations	71
About BuzzCity	75

Executive Summary

Over the past twelve months, the BuzzCity Mobile Advertising Network has grown by more than three hundred percent. In 2008, we served 19.5 billion ads across thousands of publisher sites in more than 100 countries.

In this fourteen country survey, we track the online and offline interests of mobile internet consumers. For the first time, we have also surveyed mobile surfers outside of BuzzCity's myGamma social networking community. The key take-home points are:

1. Consumers use mobile devices to access the internet. *But they are NOT on the move.* The majority of users – seventy percent, in fact – are at home when they go online. The percentage of people who access the internet while outdoors or in transit is minimal, though there are exceptions.
2. Communicating with friends is the most common reason for accessing the mobile internet. Chatting, blogging, discussion groups and forums are all popular. Sixty percent of survey respondents list communication as the main reason for going online. This figure tops seventy-five percent in several markets.
3. Entertainment and news sites also draw people online. Sixteen percent of survey respondents say they use the mobile internet to play games, listen to music and watch videos. Another ten percent stay up-to-date on current affairs.
4. Access is regular and frequent: 87% of users surf at least once a day. Half of all users go online more than five times a day. More than sixty

percent of respondents spend thirty minutes or more online each time they log in.

5. Usage is spread throughout the day, but the most popular time to surf starts in the early evenings and continues past midnight. Few people go online during the lunch hour.
6. Surfers clearly want to be able to do more with their mobile devices. And while commercial transactions are not the primary reason for going online, consumers want to transact in cyberspace. Desired services include airtime transfers, the ability to pay bills and purchase tickets, items for online games and financial services such as remittances, loans and transfers.
7. Blue-collar and service industry workers are a core part of the mobile internet community. Students, however, account for nearly one-third of mobile internet users and freelancers & small business owners (such as beauty salons, coffee stalls and convenience stores) make up another 20%.
8. The majority of mobile internet users have post-secondary education, including trade schools and university. But individuals without much formal education constitute a significant part of the mobile community in some countries.
9. Top on the shopping list this year for survey respondents are video game consoles and computer-peripherals.
10. Even though surfers connect to the mobile internet several times a day, often for an hour or more at a time, they are not “couch potatoes”. Thirty-five percent of survey respondents enjoy outdoor sports or go to the gym. Family gatherings are second on the list of favorite activities.

11. Nokia is the preferred phone in most markets. Forty-five percent of mobile consumers across the BuzzCity network are using Nokia phones.

While this survey polls the habits of a broader range of mobile internet users, the findings are largely consistent with previous studies:

The “typical” mobile consumer is a twenty-something male with an annual income that places him in the “bottom of the pyramid”. He may be upwardly mobile, though – a student, freelancer or small business owner – and regardless of income bracket he has disposable income to purchase electronic and virtual goods. He enjoys outdoor activities but can spend several hours a day online interacting with his social network. The typical user also demands more mobile services. And that means that even in challenging economic times like these, there are plenty of opportunities for m-commerce.



1. Background

BuzzCity is an internationally-acclaimed provider of mobile social networking and mobile advertising services. We launched our mobile advertising network in late 2006 and have been tracking its growth since then. The BuzzCity Advertising Network currently comprises more than 2,000 mobile publisher sites of various categories, including community sites, entertainment, downloads and news information services.

Ad Banners Delivered on BuzzCity Mobile Advertising Network				
	Q1	Q2	Q3	Q4
Network Total	2,621,417,652	3,898,531,532	5,392,646,352	7,546,469,278

The pace of growth has been staggering. From end-2007 to end-2008, the network grew by some 300%. And as you can see from the table above, the number of banner ads served nearly tripled between the first and fourth quarters of 2008, when BuzzCity served 7.5 billion ads.

BuzzCity began surveying mobile internet users in June 2007 to gauge consumer habits and trends. The key difference between this – our third report – and previous surveys is that previous studies were confined to the myGamma social networking community. We are now tracking responses across the entire network. We hope this study will demonstrate whether earlier patterns have changed or been reinforced by the influx of new users to the network.

2. Objectives

The primary objective of this fourteen country survey is to gauge the motivations and habits of mobile internet users. We aim to determine whether the rapid growth in usage, as described above, has impacted consumer decisions and trends.

In particular, this survey should provide insight on user demographics and spending power. The results may also influence the design of future mobile content and platforms.

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

3. Survey Methodology

The survey was kept short to cater to the media of choice, the mobile internet. Participants were asked eleven multiple choice questions.

The survey was conducted in fifteen countries from 15th November to 17th December 2008. One country, Bangladesh, was dropped from the report due to insufficient user response. From the fourteen remaining countries, over 3400 consumers participated in the survey – from 190 in South Africa to 409 in Thailand.

Here's how the survey worked:

Text banners publicising the survey were placed on publisher sites across the BuzzCity mobile advertising network. Respondents were offered “Gamma Dollars” (a virtual currency used within the myGamma social network) in return for their participation. Users who clicked the banner ad were directed to the survey questionnaire. To minimize intrusion, the advertising server was set to ensure that a mobile surfer saw the ad no more than five times.

To ensure a fair sampling of user behavior, a variety of publisher sites were included in the exercise, including download services, entertainment sites, news & information, search and social networking communities.

Critical in the data collection process was the selection of countries. BuzzCity’s mobile advertising network covers a selection of global sites. Sites were selected based on ranking derived from our Q3 Mobile

Advertising Index. All the Top 10 countries were selected because they represent the highest amount of traffic across the entire network (and presumably the largest number of people surfing). Four countries were selected from The Next 10.

Collectively these countries represent a diverse cultural, economic and geographic range. From this we envisaged developing global trends and individual market eccentricities.

Country	Banners Served in Q3	Q-on-Q Growth	Number of Respondents
Indonesia	1,786,233,512	47%	241
India	659,831,862	-1%	204
South Africa	540,285,545	-7%	190
Kenya	298,695,797	91%	243
United States	260,972,684	37%	232
Libya	103,309,607	1640%	201
Tanzania	114,348,431	30%	211
Egypt	97,686,203	76%	219
Romania	102,573,994	43%	202
Brunei	81,326,034	27%	215
Nigeria	79,185,697	119%	383
Pakistan	65,530,797	67%	199
Philippines	52,861,990	-5%	258
Thailand	38,372,256	28%	409
Total			3407

Countries Surveyed
November – December 2008



Demographic data not specifically requested in the survey – age and gender information – comes from myGamma membership statistics. myGamma members provide this data upon registration.

In the final qualitative analysis, results from previous lifestyle surveys have also been considered, as have semi-structured interviews and observations expressed by members to myGamma customer service personnel. When possible, survey responses have been corroborated with data from our servers.

User profiles, behavior and usage patterns across the network were deduced from surveys conducted largely on myGamma, a BuzzCity owned mobile social networking community. A survey conducted in 2007 examined user demographics and access habits¹. Another survey in early 2008² examined additional mobile services desired by consumers and demonstrated that mobile users want to be able to transact more with their phones.

Abstracts from previous surveys have been reported in pen profiles published in Gamma Life, BuzzCity's corporate blog (<http://gammalife.blogspot.com>).

¹ BuzzCity Global Wireless Communities Report

² The Digital Lifestyle Report – What more do users want?

4. Survey Results

What do you use mobile internet sites for?

Across the network, sixty percent of users access the mobile internet to communicate with friends through online tools like chat, blogs, and discussion groups etc. This is most prevalent among users from Thailand, USA, Kenya and Nigeria. Sixteen percent access for entertainment (i.e. play games, music, videos) while ten percent surf for information. This result is consistent with previously surveyed users and re-affirms the mobile phone as a social networking tool.

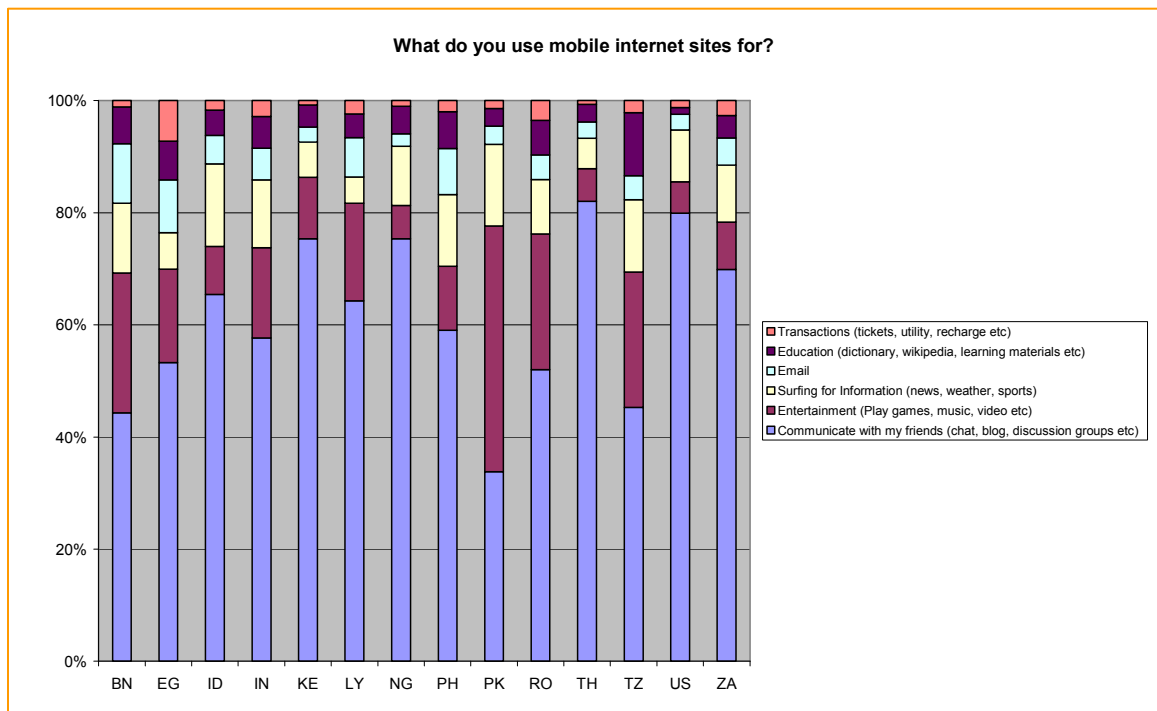


Chart 1

At sixteen percent, the second most popular reason why people connect to the mobile internet is entertainment, particularly to access games, music and videos. Pakistani users are the most likely to seek entertainment over their phones.

Ten percent of users say they go online to surf for information, like news, sports and weather.

Email usage is relatively low³ (5%) but Brunei (11%), Egypt (9%), Philippines (8%) and Libya (7%) report higher than average usage.

³ Probably superseded by SMS.

How often do you visit mobile internet sites / services?

Users access the mobile internet regularly and often. On average, 87% of those surveyed use the mobile internet at least once a day. More than 50% go online six times or more daily.

Thais are the most avid mobile surfers, both in terms of frequency per day and the amount of time spent online each session. More than seventy percent of Thai users connect to the mobile internet six or more times a day.

Libya and the US register the next highest usage, in terms of frequency, with 67% and 61% of users respectively accessing the internet more than five times a day.

Egypt and Tanzania are the only countries surveyed where a large block of users access the mobile internet less than once a week (about 11% each).

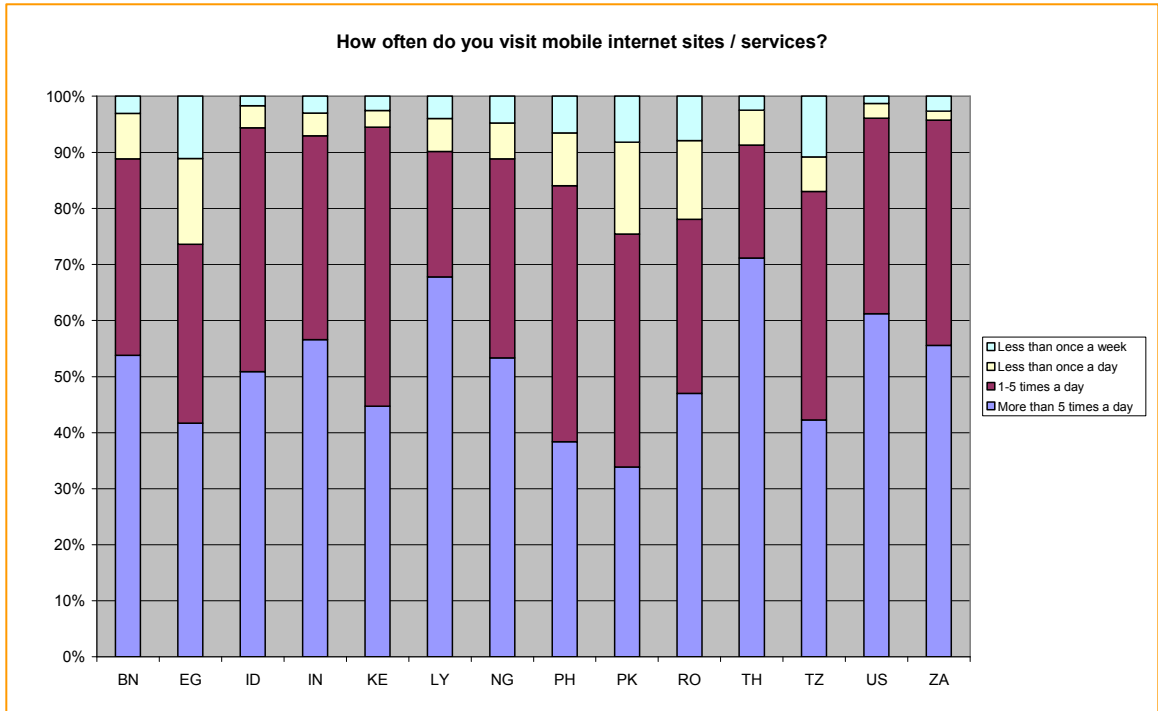


Chart 2

How long is one session?

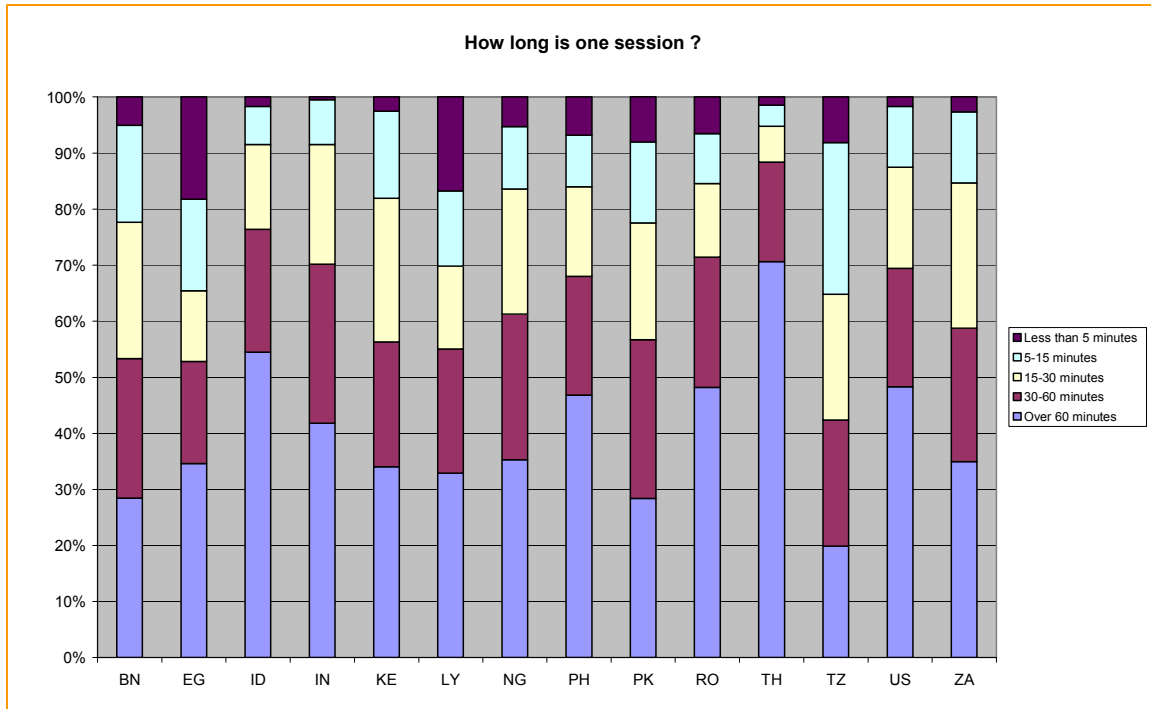


Chart 3

More than 60 percent of respondents spend thirty minutes or more online each time they log in. Eighty-one percent (81%) spend at least fifteen minutes online at a time.

As mentioned above, Thais are the most avid surfers. Seventy percent of Thai respondents spend at least one hour online each time they log in. The network average for longer-than-an-hour sessions is 39%.

This is in line with previously observed surfing behavior and coincides with general social networking and browsing activity.

Users from India, Indonesia, The Philippines, Romania and the US also enjoy longer sessions online.

Countries where users are more likely to have short mobile internet sessions are Egypt, Libya and Tanzania.

Where are you when you access mobile sites?

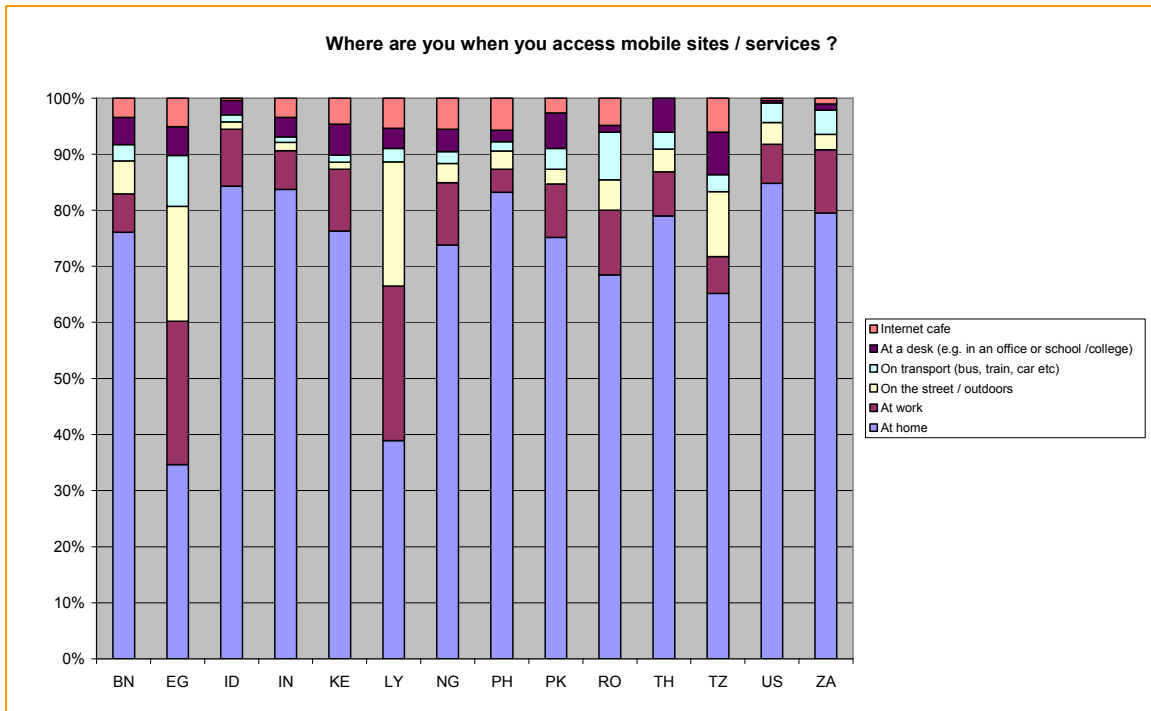


Chart 4

Users are generally NOT on the go when they access the mobile internet, even though they use a mobile device to get online. While this finding may be the opposite of what you'd expect, it is consistent with our previous surveys.

Seventy percent of survey respondents report that they are at home when they access mobile sites. Another eleven percent is at work.

The only countries in this survey with a significant amount of outdoor or on-the-move surfing are Egypt, Libya and Tanzania.



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Access from internet cafes, meanwhile, accounts for just three percent of all activity and suggests that few users' access mobile sites from computers and mobiles are the preferred mode of internet access.

What time of day do you go online?

Peak hours vary by country, but most users (61%) tend to go online in the early evening or late at night. In twelve out of fourteen countries surveyed, the most popular time to surf the mobile internet is in the evening after dinner. Across the network, 36% of mobile surfers access the internet at this time.

The second most popular period is after midnight, when 25% of respondents connect. Late night usage is most pronounced in Thailand. Sixty percent of Thai users go online after midnight. In Nigeria and The Philippines, users are more likely than others to start surfing in the mornings.

While usage is spread throughout the day, there is a distinct break in most countries at lunch time, when only six percent of respondents surf the 'net.

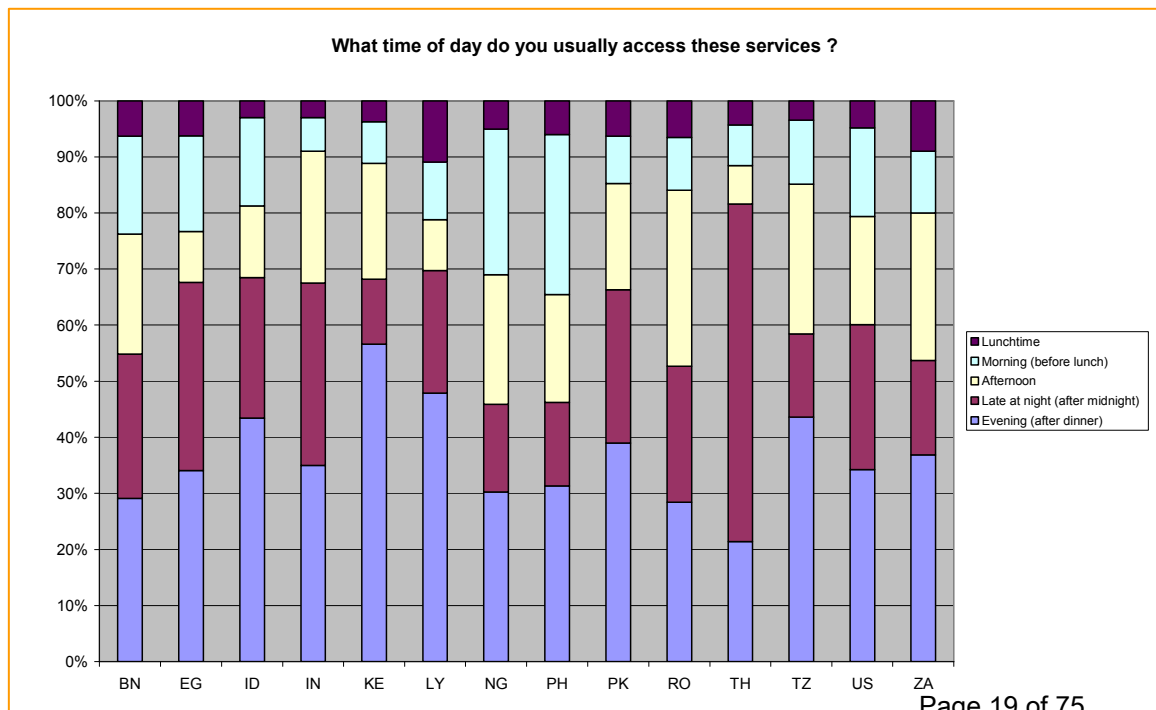


Chart 5

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

Users want to do a lot more with their mobiles, a trend that is consistent with our previous survey results. Across the network the most wanted capabilities are:

1. Airtime transfers⁴ (34%)
2. Paying bills, buying tickets, groceries, parking, etc. (34%)
3. Items for use in online games (20%)
4. Financial Services, including loans and remittances (13%).

Demand for airtime transfers is particularly strong in Kenya, Nigeria and Thailand, where one-half to two-thirds of users are demanding the service.

Online games demand is strongest in Brunei (30%), the United States (28%), The Philippines (26%) and India (24%).

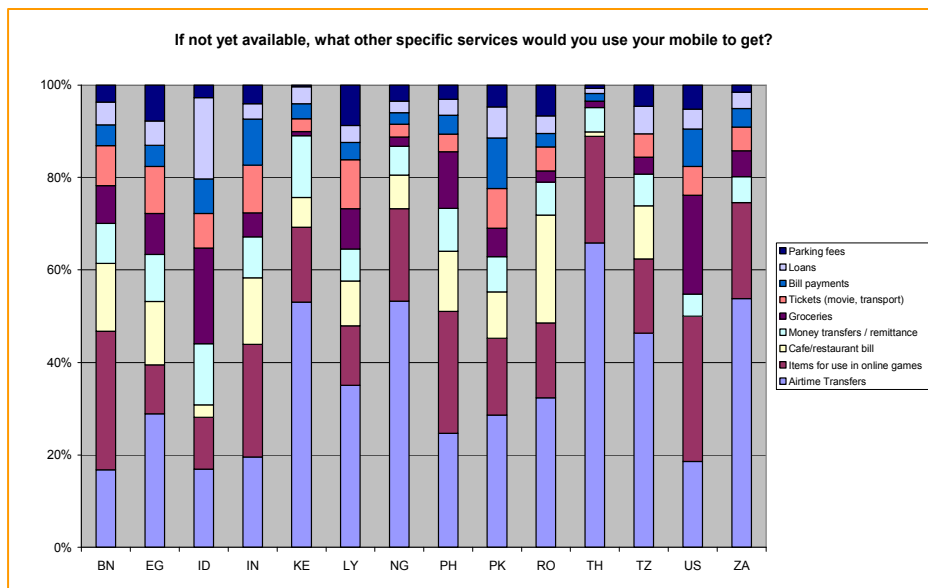


Chart 6

⁴ During the survey period only Vodacom in South Africa offered (free) Airtime Transfers between users.

What you are most likely to buy for your self in the next 12 months?

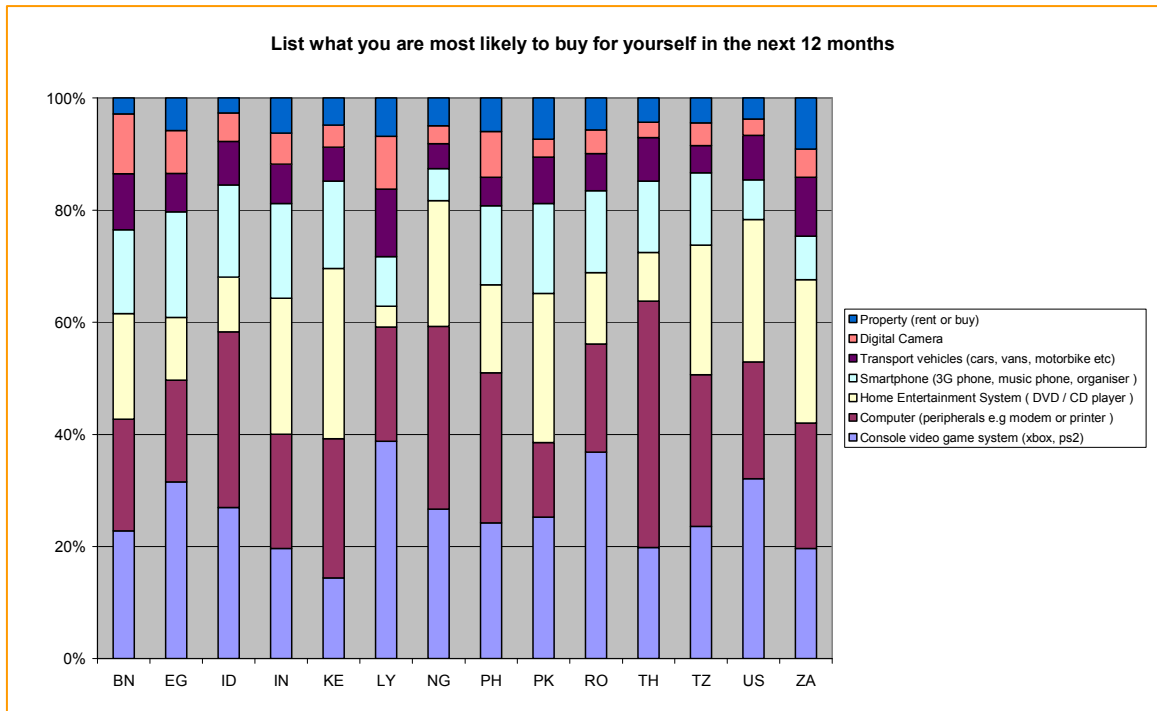


Chart 7

Mobile internet users expect to make a variety of purchases in 2009. Top of the list for one-quarter of the survey respondents is a video game console. Another 24% plan to buy a PC or computer-related peripherals. Eighteen percent intend to purchase a home entertainment system, CD player or DVD player. And thirteen percent say they will buy a smartphone.

Which of the following activities do you enjoy?

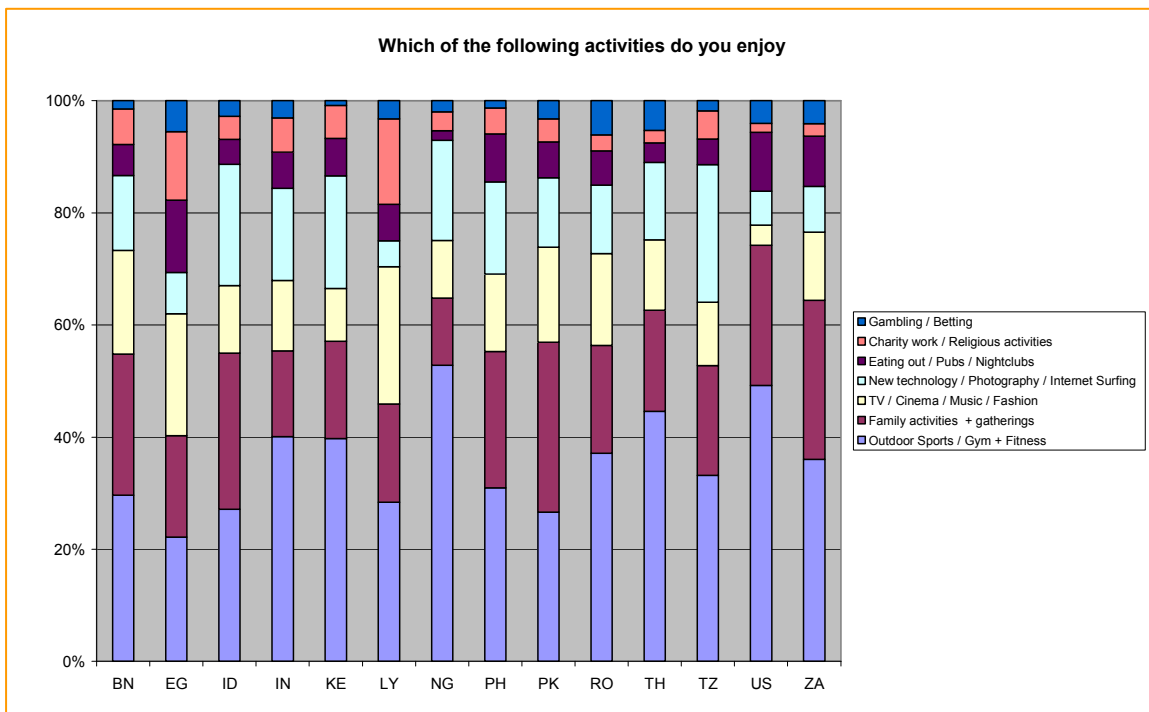


Chart 8

Even though surfers connect to the mobile internet several times a day, often for an hour or more at a time, this doesn't mean they are sedentary. Not in the slightest.

More than one-third of survey respondents play sports or go to the gym. Another 20% rank family activities and gatherings as a favorite activity.

New technology and digital photography is an entertainment staple for fourteen percent of users as is mainstream entertainment like movies, music, television and fashion.



This is a much lower response rate for traditional media than in our last survey, when 42% of respondents chose it. Another major difference between this survey and our last is that few respondents – just 5% -- now list charity and religious activities as an activity that they enjoy, down from 27% in July when charity work was the second most popular response.

What is your highest education level?

The majority of mobile internet users – sixty percent, in fact -- have studied at a formal tertiary institution, be it a trade school or university. The network average for those with an A-level certificate, diploma, trade certification, etc. is 41%. Nineteen percent have a university degree or post-graduate education.

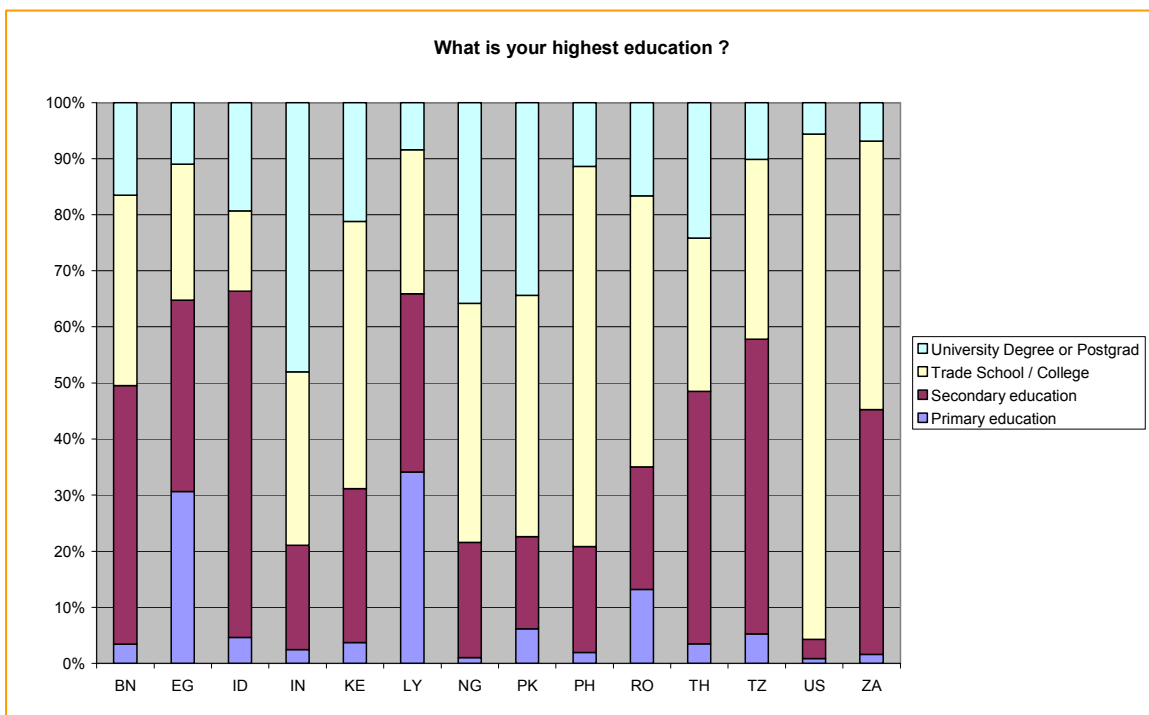


Chart 9

The country with the highest percentage of university graduates using the mobile internet is India. Countries where university grads make up only a small part of the mobile community are Libya, South Africa and the US. Still, individuals without much formal education constitute significant parts of the user base in a number of countries. Approximately one-third of Egyptian and Libyan users say that primary school is their highest level of education.

What is your monthly income?

At BuzzCity, we're not economists, so we're not going to attempt a cross-country comparison of wages as in order for this to be meaningful we would need to implement principles of purchasing power parity and the like.

However, we can report that in most countries surveyed, mobile internet users generally fall in the mid - lower income brackets. Considering that students and service workers are a large part of the user base, this isn't surprising. This result is also consistent with previously reported data as well as with BuzzCity's focus on the 'bottom of the pyramid'.

Country results are reported in the individual country sections below.

What do you do for a living?

There are definite occupational trends across the network; however we note some regional variation as well. Students make up the biggest group of mobile internet users. Thirty percent of survey respondents are in school. In The Philippines though, one out of every two mobile surfers is a student. In Indonesia, only 15% are studying.

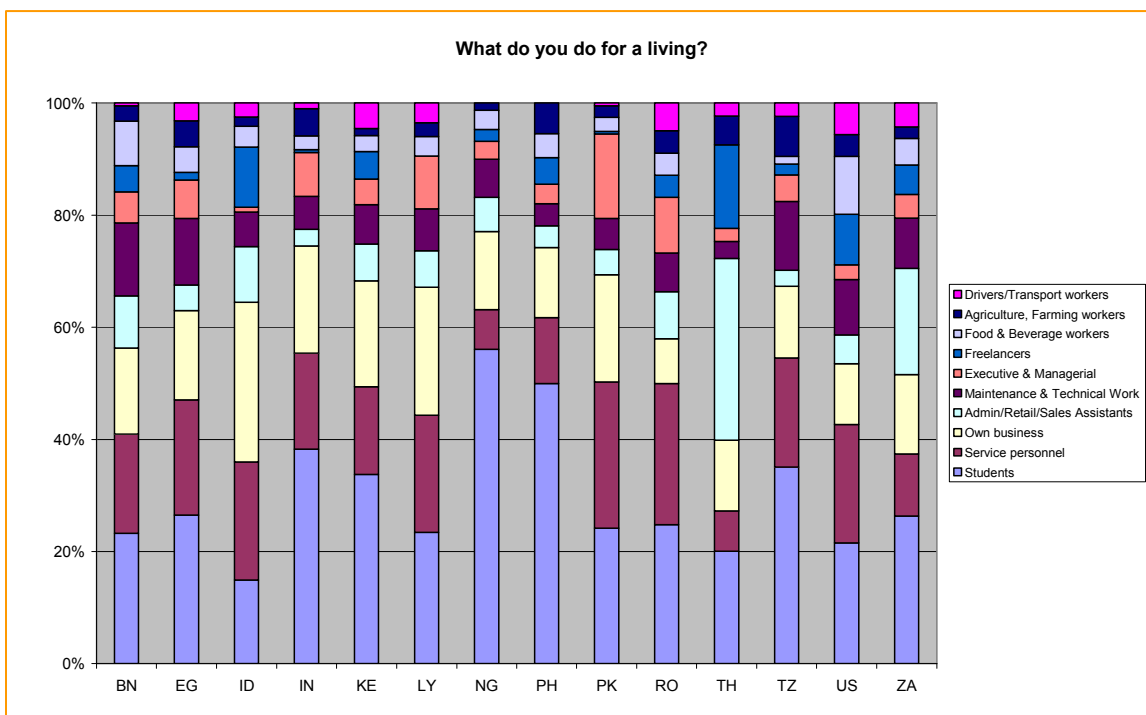


Chart 10

The next group to note is business owners and freelancers, who comprise nearly twenty-two percent (22%) of survey respondents. A sampling of respondents suggests that these business owners are involved in a wide range of services, including pre-paid cards and mechanics in Indonesia, grocery stores in Kenya and Nigeria, convenience stores in South Africa

and beauty salons, coffee stalls, noodles vendors and a goldsmith in Thailand.

The biggest group of wage earners is service personnel, who constitute 17% of respondents. Taken as a group, an additional 20% of all mobile users are admin, retail and F&B workers.

Less than six percent of network users are executives and managers. However in Pakistan, this figure rises to 15%.

Demographics

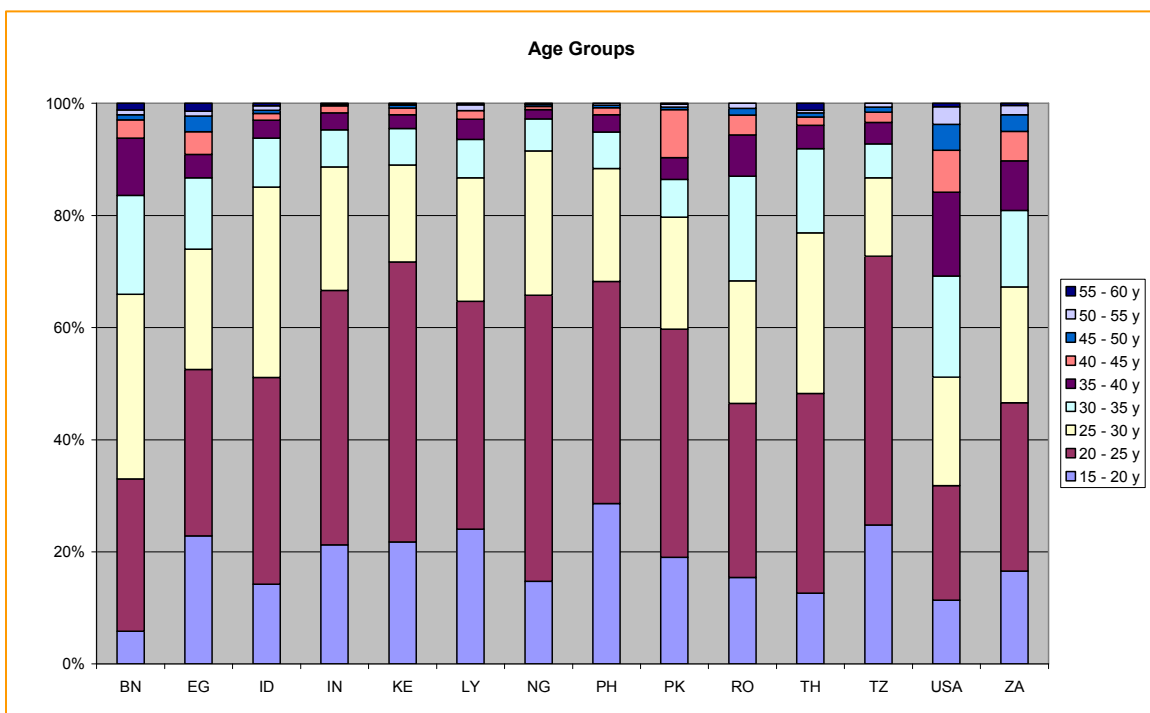
Gender

Globally, sixty-nine percent (69%) of mobile internet users are men; thirty-one percent (31%) are women. The countries with the highest and lowest percentage of male/female users are highlighted in the table below.

	M	F
Brunei	51%	49%
Egypt	78%	22%
Kenya	68%	32%
India	82%	18%
Indonesia	70%	30%
Libya	75%	25%
Nigeria	82%	18%
Pakistan	72%	28%
Philippines	54%	46%
Romania	72%	28%
S Africa	53%	47%
Tanzania	81%	19%
Thailand	58%	42%
USA	59%	41%
Global	69%	31%

Age

More than eighty percent of all mobile surfers are under the age of thirty. Sixty-six percent (66%) are between the ages of 20 – 30. Most of these are in their lower twenties. 15-20 year-olds constitute 17% of the user base.



5. Country Profiles

Brunei

1. Forty-four percent (44%) of Bruneians use the mobile internet to communicate with friends, nearly seventeen percentage points below the network average. One-quarter of Bruneian users access it for games, music and videos. Twelve percent surf for information and eleven percent to read and send emails, the highest rate of any country surveyed.
2. Eighty-eight percent (88%) of users access the mobile internet at least once a day. Fifty-four percent (54%) go online six or more times daily.
3. Bruneians likely spend less time online during a single session than most other users. Twenty-eight percent (28%) connect for more than an hour at a time, twenty-five percent (25%) for 30 – 60 minutes and another twenty-four percent (24%) for 15 – 30 minutes. Still, that means that 77% of Bruneian mobile internet users go online for more than fifteen minutes each session.
4. Users surf mainly from home (76%). Seven percent access the mobile internet at work.
5. Usage is spread throughout the day. Seventeen percent (17%) of respondents go online in the morning, 21% in the afternoon, 29% in the evenings and 26% after midnight.

6. Thirty percent of Bruneian users would like to use their mobile phones to buy items for online games, the highest rate of any country surveyed. Users are also keen to use their mobiles for airtime transfers (17%) and to pay café/restaurant bills (15%).
7. Consumer items that are high on Bruneian wish lists – and which respondents say they are likely to purchase within the next twelve months – are video game consoles (23%), computer-related peripherals (20%), home entertainment systems (19%), smartphones (15%) and digital cameras (11%). Nearly ten percent of respondents also plan to buy a car or motorcycle.
8. Typical users from Brunei enjoy outdoor sports (30%), family activities (25%), TV/Cinema/Music/Fashion (19%) and new technology (13%).
9. What is your highest education level?
 - a. Primary School = 3.40
 - b. Secondary School = 46.12
 - c. Post Secondary (Trade Cert) = 5.83
 - d. Vocational School/ College = 28.16
 - e. University/Postgrad = 16.50

10. What is your monthly income?

Including students and those not working, sixty-five percent of Bruneian respondents earn less than BND800 (USD 552) per month.

Earnings	Earnings (USD)	%
Below BND 800	Below USD 552	39.22
BND 801 - 1000	USD 552 - USD 690	15.2
BND 1001 - 1500	USD 690 - 1035	8.33
BND 1501 - 2000	USD 1035 - 1380	6.37
BND 2001 - 2500	USD 1380 - 1725	0.49
BND 2501 - 3000	USD 1725 - 2070	2.45
Above BND 3000	Above USD 2070	1.96
Not working		25.98

11. Students account for 23% of Bruneian users. The second biggest group consists of business owners & freelancers (20%), followed by service personnel (16%) and maintenance & technical workers (13%).

The top three phone models in Brunei are Nokia (58%), Sony Ericsson (2%) and Motorola (1.2%).

Egypt

1. Fifty-three percent (53%) of Egyptians use the mobile internet to communicate with friends, 17% access entertainment like games, music and videos and 9% use it for email. Usage is evenly spread at 7% each for education, surfing for information and transactions (buying tickets, paying utilities, etc.).
2. Seventy-three percent (73%) of respondents access the mobile internet at least once a day. More than half of these users go online six or more times a day.
3. Thirty-five percent (35%) of users access the mobile internet for more than an hour each time. Eighteen percent (18%) access for 30-60 minutes and 16% for 5-15 minutes at a time.
4. Egypt has the highest rate of users who access the mobile internet while on the go. Twenty percent are on the street or outside; an additional nine percent are commuting.
5. The majority of Egyptians still access the mobile internet from a fixed location though: 35% from home and 26% at work.
6. Surfing activity is relatively high in the morning (17%). Afternoon activity (9%) is lower than the network average (14%). Mobile usage is highest in the evening and late at night (34% each).

7. Users are keen to use their mobiles for airtime transfers (29%) and to pay for café/restaurant bills (14%). Users also want to use their mobiles for money transfers (10%), tickets (10%) and to buy items for online games (10%).
8. Thirty-one percent (31%) expect to buy a console video game system in the next 12 months. Nineteen percent (19%) plan to buy a smartphone, 18% a computer-related peripheral and 11% a home entertainment system.
9. Typical users from Egypt enjoy a wide variety of activities : outdoor sports (22%), TV/Cinema/Music/Fashion (22%) and family activities (18%).
10. What is your highest education level?
 - a. Primary School = 30.64
 - b. Secondary School = 34.10
 - c. Post Secondary (Trade Cert) = 13.29
 - d. Vocational School/ College = 10.98
 - e. University/Postgrad = 10.98

11. What is your monthly income?

Including students and those not working, nearly fifty percent of Egyptian users earn less than EGP 150 per month. Thirty-six percent (36%) earn a monthly salary higher than EGP 251.

Earnings	Earnings (USD)	%
< EGP 150	Below USD 27	28.65
EGP 151 – 200	USD 27 - 36	8.43
EGP 201 – 250	USD 36 - 45	6.18
EGP 251 – 300	USD 45 - 54	17.98
Above EGP 300	More than USD 54	17.98
Not working		20.79

12. The largest user group consists of students (26%), followed by service personnel (20%), business owners & freelancers (17%) and maintenance / technical workers (12%).

13. The top three phone models are Nokia (79%), Samsung (4%) and Sony Ericsson (2%).

Indonesia

1. Sixty-five percent (65%) of Indonesians use the mobile internet to communicate with friends, via chats, blogs, discussion groups, etc. Fifteen percent (15%) surf for information and nine percent (9%) use it for entertainment.
2. Almost all Indonesian users (94%) accessing the mobile internet at least once a day. More than half of Indonesian respondents say they go online six or more times daily.
3. Indonesians also spend more time online than most other users. Fifty-four percent (54%) surf for more than an hour each session. Ninety-one percent (91%) are online for more than fifteen minutes at a go.
4. Users surf mainly from home (83%). Ten percent of respondents surf while at work.
5. While users surf throughout the day, the majority of Indonesian users go online in the evenings (43%) or late at night (25%). Sixteen percent access the mobile internet in the morning, thirteen percent in the afternoons.
6. Twenty-one percent (21%) of Indonesians would like to use their mobile phones to purchase groceries, the highest rate of any country surveyed. Indonesians are also keen to use their mobiles for airtime transfers (17%), loans (18%), money transfers (13%) and items for online games (11%).

7. Thirty one percent (32%) expect to buy computer related peripherals, 27% plans to buy a console video system and 16% intend to buy a smartphone.

8. Typical users from Indonesia enjoy outdoor sports (27%), family activities (28%) and new technology (22%).

9. What is your highest education level?

- a. Primary School = 4.62
- b. Middle School = 10.08
- c. High School = 51.68
- d. Diploma (College) = 14.29
- e. Universitas (University) = 19.33

10. What is your monthly income?

Nearly fifty-four percent (54%) of Indonesian users earn between 80,000 – 2 million rupiah per month.

Including students and those not working, twenty-five percent (25%) of respondents earn less than IDR 80,000 per month.

Earnings	Earnings (USD)	%
Below IDR 80,000	Below USD 7	14.89
IDR 80,000 – IDR 1,200,000	USD 7 - 110	33.19
IDR 1,200,001 – IDR 2,000,000	USD 110 - 183	20.43
IDR 2,000,001 – IDR 3,000,000	USD 183 - 274	13.62
IDR 3,000,001 – IDR 4,000,000	USD 274 - 366	2.13
IDR 4,000,001 – IDR 5,000,000	USD 366 - 457	1.28
Above IDR 5,000,000	Above 457	4.26
Not working		10.21

11. Thirty-nine percent (39%) of Indonesian users are business owners and freelancers. Service personnel form the second largest group (21%), followed by students (15%) and admin / retail assistants (10%).
12. The top phone models are Nokia (49%) and Sony Ericsson (25%).

India

1. More than 57% of Indians use the mobile internet to communicate with friends, slightly lower than the 61% network average.
2. Sixteen percent (16%) surf for entertainment (to play games, listen to music and watch videos); twelve percent (12%) surf for information.
3. Ninety-two percent (92%) of users access the mobile internet at least once a day. Fifty-six percent (56%) go online more than 5 times a day.
4. Sessions are lengthy. More than forty percent (40%) spend at least one hour online each session. Some 91% surf for more than 15 minutes at a time; 69% for more than 30 minutes per session.
5. Users surf mainly from home (84%); seven percent (7%) surf at work.
6. While users surf throughout the day, activity picks up after lunch (24%), peaks in the evenings (35%) and barely drops off after midnight (32%).
7. Users are keen to use their mobiles for a variety of activities: items for online games (24%), airtime transfers (20%) and café/ restaurant payments (15%). Bill payments and online ticketing for movies/transport/etc. constitute ten percent each.
8. Consumer items that are high on Indian wish lists – and which they say they are likely to purchase within the next twelve months – are DVD players and home entertainment systems (24%), computer-related peripherals (20%), video game systems (20%) and smartphones (17%).

9. Typical users from India enjoy outdoor sports (40%), new technology (16%) and family activities (15%).

10. What is your highest education level?

- a. Primary school = 2.45
- b. Secondary School = 18.63
- c. Diploma, A Level, college = 15.20
- d. Post Secondary (Trade Cert) = 15.69
- e. University/Postgrad = 48.04

11. What is your monthly income?

The income distribution of Indian respondents is fairly evenly spread out, with the biggest group earning between 5000 – 10,000 rupees per month.

Earnings	Earnings (USD)	%
Below Rs. 1500	Below USD 31	5.53
Rs 1501 - 3000	USD 31 - 62	7.04
Rs 3001- Rs 5000	USD 62 - 103	8.04
Rs 5001 - Rs 10000	USD 103 - 205	16.08
Rs 10001 - Rs 20000	USD 205 - 411	10.55
Rs 20001 - Rs 30000	USD 411 - 616	8.54
Above Rs 30000	Above USD 616	5.03

12. Thirty-eight percent of Indian users are students. Business owners & freelancers (20%) form the second largest group of users, followed by service personnel (17%).

13. Eighty two percent are male and 18% are females. The vast majority are under the age of 30:

15 – 20 y/o	21%
20 – 25 y/o	45%
25 – 30 y/o	22%

14. The top three phone models in India are Nokia (59%), Sony Ericsson (8.4%) and Motorola (3.4%).

Kenya

1. More than 75% of Kenyans use the mobile internet to communicate with friends (via chat, moblogs, discussion forums, etc.), 14 percentage points above the network average and one of the highest rates across the countries surveyed.
2. Eleven percent of Kenyan respondents say they surf the mobile internet for entertainment (to play games, listen to music and watch videos); six percent surf for information.
3. Ninety-four percent (94%) of Kenyan users access the mobile internet at least once a day. Some 45% go online more than 5 times a day
4. One-third of Kenyan respondents spend at least one hour online each session. Eighty-two percent (82%) surf for more than 15 minutes at a time; 56% for more than 30 minutes per session.
5. Users surf mainly from home (76%). Eleven percent (11%) surf at work.
6. While users surf throughout the day, activity picks up in the afternoon (21%) and peaks in the evenings (57%). Twelve percent (12%) surf late at night.
7. Users are keen to use their mobiles for airtime transfers (53%), online games (16%) and remittances (13%).
8. Consumer items that are high on Kenyans' wish lists – and which they say they are likely to purchase within the next twelve months – are DVD

players and home entertainment systems (30%), computer-related peripherals (25%) and smartphones (16%).

9. Typical users from Kenya enjoy outdoor sports (40%), new technology (20%) and family activities (17%). It's worth noting that in our last survey, some forty percent of Kenyan myGamma respondents listed charity work and religious events as a favorite activity, but this time around charity is a distant sixth with just six percent (6%) of respondents choosing it as a favorite activity.

10. What is your highest education level?

a. Primary education	=	3.73 %
b. Secondary education	=	27.39%
c. Middle level colleges	=	44.40 %
d. Trade schools/Private School	=	3.32 %
e. University Degree or Postgrad	=	21.16 %

11. What is your monthly income?

The largest single group earn less than USD 40 per month, not surprising perhaps, considering that one-third of survey respondents are students. The second biggest income bracket, though, is the largest in this survey: more than USD 90 per month.

Earnings	Earnings (USD)	%
3000 Shilling & below	USD 38.81	39.09 %
3001 - 4000 Shilling	USD 51.75	14.81 %
4001 - 5500 Shilling	USD 71.15	8.64 %
5501 - 7000 Shilling	USD 90.56	10.29 %
Above 7000 Shilling	USD 90.57	27.16 %

12. Thirty-four percent of Kenyan users are students. Nearly one-quarter are business owners & freelancers. Service personnel make up sixteen percent (16%) of respondents.

13. The top three phone makes are Nokia (45%), Motorola (19%) and Samsung (11%).

Libya

1. Sixty-four percent (64%) of Libyans use the mobile internet to communicate with friends. Eighteen percent (18%) access entertainment like games, music and videos. Seven percent use it for email.
2. Ninety percent (90%) of Libyan users access the internet more than once daily. Sixty-eight percent (68%) access six times a day or more (as compared with the network average of 50%).
3. Seventy percent (70%) of users spend more than more than 15 minutes at a time online. Thirty-three percent (33%) surf for more than an hour per session.
4. Twenty-two percent (22%) of Libyans connect to the mobile internet while on the street or outdoors, the highest rate of any country surveyed. The most popular locale though for going online is still home (39%) followed by work (28%).
5. Most Libyans go online in the evening (48%) or late at night (22%). Libya has the highest rate of users who go online during lunch: 11%. Morning and afternoon account for ten percent of usage each.
6. Users are keen to use their mobiles for airtime transfers (35%), to buy items for online games (13%), movie tickets, etc. (11%), groceries (9%), restaurant bills (10%) and parking (9%).
7. Thirty-nine percent (39%) expect to buy a console video game system within the next 12 months. Twenty percent (20%) plan to buy computer-

related peripherals and twelve percent are planning to get a vehicle. Nine percent (9%) of users plan to buy a smartphone and another 9% a digital camera. Only four percent plan to get a home entertainment system, well below the 18% network average.

8. Typical users from Libya enjoy outdoor sports (28%), TV/Cinema/Music/Fashion (25%), charity work / religious activities (15%), and family activities (17%). User interest in new technology (5%) is low compared to the network average (14%).

9. What is your highest education level?

a. Primary School	=	34.13
b. Secondary School	=	31.74
c. Post Secondary (Trade Cert)	=	11.38
d. Vocational School/ College	=	14.37
e. University/Postgrad	=	8.38

10. What is your monthly income?

Including students and those not working, some 75% of Libyan users earn less than 700 dinars a month.

Earnings	Earnings (USD)	%
< LYD 700	Below USD 574	32.94
LYD 701-750	USD 574 - 615	5.7
LYD 751 - 800	USD 615 - 656	3.16
LYD 801 -900	USD 656 - 738	3.16
Above LYD 900	Above 738	6.96
Not working		41.77

11. Students (23%) and business owners (23%) form the largest single groups of users, followed by service personnel (21%).

12. The top three phone models are Nokia (76%), Samsung (4%) and Sony Ericsson (4%).

Nigeria

1. Seventy-five percent (75%) of Nigerians use the mobile internet to communicate with friends. Eleven percent (11%) surf for information and six percent access entertainment like games, music and videos.
2. The vast majority of Nigerian users (89%) access the mobile internet every day. More than half go online at least six times a day.
3. The average duration of each session is more than one hour for 35% of Nigerians. Twenty-two percent (22%) surf for 15-30 minutes at a time; another 25% say they surf between 30 – 60 minutes each time they go online.
4. Users surf mainly from home (74%); 11% surf from work.
5. Nigerian surfing activity is spread fairly evenly throughout the day, though as in other countries, few users go online during the lunch hour. After The Philippines, Nigeria has the highest rate of morning surfers (26%). The most active period is in the evening (30%); only sixteen percent (16%) surf late at night.
6. Users are keen to use their mobiles for airtime transfers (53%), online games (20%) and remittances (6%).
7. Consumer items that are high on Nigerian wish lists – and which respondents say they are likely to purchase within the next twelve months – are computer peripherals (33%), video game consoles (27%) and home entertainment systems (22%).

8. Surfers from Nigeria enjoy outdoor sports (53%), new technology (18%), family activities (12%) and television/movies/music/fashion (10%).

9. What is your highest education level?

- a. Primary school = 1.05
- b. Secondary school = 20.53
- c. Post Secondary (Trade Cert) = 17.63
- d. Diploma, A Level, College = 25.00
- e. University Degree or Postgrad = 35.79

10. What is your monthly income?

Including students and those not-working, more than seventy percent of all Nigerian respondents earn less than 8000 Naira (USD 58) per month. However, the next biggest group is also the highest income bracket for this survey, 10,001 Naira and above.

Earnings	Earnings (USD)	%
8000 Naira & below	Below USD 58	16.09
8001 - 8500 Naira	USD 58 - 61	4.83
8501 - 9000 Naira	USD 61 - 65	4.02
9001 - 10,000 Naira	USD 65 - 72	5.09
Above 10,000 Naira	Above USD 72	19.57
Not working		50.40

11. While the majority are students (56%), business owners & freelancers (16%) form the second largest group of users, followed by service & maintenance personnel (14%).
12. The top three phone makes are Nokia (63%), Sagem (4%) and Sony-Ericsson (3.7%).

Philippines

1. Fifty-nine percent (59%) of Filipinos use the mobile internet to communicate with friends, thirteen (13%) surf for information and eleven percent (11%) uses it for entertainment.
2. Eighty-four percent (84%) of respondents access the mobile internet at least once a day. Thirty-eight percent (38%) go online six or more times a day.
3. Forty-seven percent (47%) of Filipinos go online for an hour or more each session. Eighty-four percent (84%) surf for more than 15 minutes at a time.
4. Users surf mainly from home (83%). Six percent access mobile internet sites from a computer in an internet café.
5. Users surf throughout the day. Surfing activity is high in the mornings (29%), drops off during lunchtime, picks up again in the afternoon (19%) and peaks in the evenings (31%). Fifteen percent of Filipino users surf after midnight.
6. Users want to use their mobiles to buy items for online games (26%), airtime transfers (25%), café & restaurant bills (13%) and groceries (12%).
7. Consumer items that are high on Filipino wish lists – and which respondents say they are likely to purchase within the next twelve months – are computer related peripherals (27%), video game consoles (24%), home entertainment systems (16%) and smartphones (14%).

8. Typical users from The Philippines enjoy outdoor sports (31%), family activities (24%) and new technology (16%).

9. What is your highest education level?

- a. Elementary = 1.96
- b. High School = 18.82
- c. Technical/Vocational School = 12.55
- d. College = 55.29
- e. University/Postgrad = 11.37

10. What is your monthly income?

Including students and those not working, sixty-nine percent (69%) of Filipino mobile consumers earn less than PHP 5000 a month.

Earnings	Earnings (USD)	%
Below PHP 5000	Below 106	32.79
PHP 5001 - 7000	USD 106 - 148	10.12
PHP 7001 - 10000	USD 148 - 211	7.29
PHP 10001 - 13000	USD 211 - 274	6.07
PHP 13001 - 20000	USD 274 - 422	2.43
PHP 20001 - 30000	USD 422 - 633	1.62
PHP 30001 - 40000	USD 633 - 844	2.02
Above PHP 40000	Above USD 844	1.21
Not working		36.44

11. Fifty percent of Filipino users are students. Business owners & freelancers (17%) form the second largest group of users, followed by service personnel (12%).

12. The top three phone models are Nokia (70%), Sony Ericsson (3%) and Samsung (1%).

Pakistan

1. Forty-four percent (44%) of Pakistanis use the mobile internet for entertainment (to play games, listen to music and watch videos), well above the 16% network average.
2. About 34% access the mobile internet to communicate with friends, the lowest rate of any country surveyed. Fifteen percent (15%) surf for information.
3. Seventy-five percent of Pakistani users go online at least once a day. More than a third of all users connect to the mobile internet six or more times a day.
4. Pakistanis appear to spend a bit less time online than users from other countries. Fifty-six percent (56%) surf for thirty minutes or more per session. Half of these users are online for more than an hour at a time. Another twenty percent (20%) connect for 15 – 30 minutes at a go.
5. Users surf mainly from home (75%); nine percent go online while at work.
6. While users surf throughout the day, activity picks up in the afternoon (19%), peaks in the evenings (39%) and remains strong late at night (27%).
7. Users are keen to use their mobiles for airtime transfers (28%), online games (17%), bill payments (11%) and eating out (10%).

8. Consumer items that are high on Pakistani wish lists – and which respondents say they are likely to purchase within the next twelve months – are home entertainment systems (26%), video game systems like x-boxes (25%), smartphones (16%) and computer peripherals (13%).

9. Typical users from Pakistan enjoy family activities (30%), outdoor sports (27%) and TV/Cinema/Music/Fashion (17%).

10. What is your highest education level?

a. Primary School	=	6.15
b. Secondary School	=	16.41
c. Post Secondary (Trade Cert)	=	18.46
d. Diploma, A Level, College	=	24.62
e. University/Postgrad	=	34.36

11. What is your monthly income?

Forty percent of Pakistani users fall into the highest income bracket for this survey, more than 7000 Pakistani rupees (USD 89) per month.

Including students and those not working, another 42% earn less than PKR 4500 a month.

Earnings	Earnings (USD)	%
PKR 4500 & below	below USD 57	14.66
PKR 4501 - 5000	USD 57 - 63	5.24
PKR 5001- 6000	USD 63 - 76	5.76
PKR 6001 - 7000	USD 76 - 89	6.81
Above PKR 7000	Above USD 89	40.31
Not working		27.23

12. By profession, the largest group of users are service personnel (26%) followed by students (24%). Business owners & freelancers form 20% of the user base with another 15% from the executive / managerial group.
13. The top three phone models are Nokia (52%), Sony Ericsson (14%) and Samsung (7%).

Romania

1. Slightly more than half (52%) of Romanians use the mobile internet to communicate with friends. Twenty-four percent (24%) use it for entertainment and ten percent (10%) surf for information.
2. Seventy-eight percent (78%) of users access the mobile internet more than once a day; forty-seven percent (47%) go online six or more times a day.
3. The average duration of one session is more than 30 minutes for 71% of Romanians; nearly one out of every two survey respondents goes online for an hour or more at a time.
4. Users surf mainly from home (68%); twelve percent (12%) surf at work. At 14%, Romania has one of the highest rates of users who surf while on the move (while commuting or walking).
5. While users surf throughout the day, activity peaks in the afternoon (31%) and remains strong in the evenings (28%) and late at night (24%). Some ten percent connect to the mobile internet in the mornings.
6. Users are keen to use their mobiles for airtime transfers (32%), café bills (23%) and items for online games (16%). Consumer items that are high on Romanian wish lists – and which respondents say they are likely to purchase within the next twelve months – are video game consoles (37%), computer peripherals (19%), smartphones (13%) and home entertainment systems (13%).

7. Typical users from Romania enjoy outdoor sports (37%), family activities (19%) and television/movies/music/fashion (16%).

8. What is your highest education level?

- a. Primary School = 12.57
- b. Secondary School = 20.77
- c. Post Secondary (Trade Cert) = 13.86
- d. Diploma, A level, College = 32.18
- e. University/Postgrad = 15.85

9. What is your monthly income? Including students and those not working, 59% of Romanian respondents earn less than RON 1000 (USD 357) per month.

Earnings	Earnings (USD)	%
RON 1000 & below	Below USD 357	31.07
RON 1001 -1500	USD 357 - 536	14.12
RON 1501 -2000	USD 536 - 714	6.78
RON 2001-3000	USD 714 - 1071	10.17
Above RON 3000	Above USD 1071	9.6
Not working		28.25

10. Students and service personnel each comprise twenty-five percent of the Romanian user base. Business owners & freelancers account for 12%; executive and managerial personnel for ten percent.

11. The top three phone models are Nokia (50%), Sony Ericsson (12%) and Samsung (6%).

Thailand

1. More than eighty percent of Thai respondents use the mobile internet to communicate with friends via chat, blogging and discussion groups, the highest rate of any country surveyed.
2. About five percent of Thais use their mobile phones for entertainment and another five percent surf for information.
3. Thais go online more frequently than any other group. Seventy-one percent (71%) access the mobile internet more than five times a day. Ninety-two percent (92%) go online at least once a day.
4. Thais also spend more time online than any other group. Seventy percent of Thai respondents say that each session is at least one hour. Ninety-six percent (96%) spend fifteen minutes or more online each time they connect.
5. Users surf mainly from home (79%). Eight percent (8%) surf at work. None of the respondents surf from an internet café.
6. Thais are a late-night people, at least when it comes to the internet. Sixty percent (60%) say they go online after midnight. Another twenty-one percent (21%) surf in the evenings after dinner.
7. Users are keen to use their mobiles for airtime transfers (66%) and items for online games (23%). Only five percent ask for the ability to transfer money via a mobile device.

8. Consumer items that are high on Thai wish lists – and which respondents say they are likely to purchase within the next twelve months – are computer-related peripherals (44%), video game consoles (20%) and smartphones (13%).

9. Typical users enjoy outdoor sports (45%), new technology (24%) and family activities (18%).

10. What is your highest education level?

- a. Primary School = 3.45
- b. Secondary School = 45.07
- c. Post Secondary (Trade Cert) = 3.45
- d. Diploma, A level, College = 23.89
- e. University Degree or Postgrad = 24.14

11. What is your monthly income?

Including students and those not working, some 45 percent of respondents earn less than THB 10,000 per month. However a quarter of respondents are in the survey's middle income grouping of THB 20-30k per month.

Earnings	Earnings (USD)	%
Below THB 10,000 per month	Below USD 289	34.25
THB 10,000 -20,000 per month	USD 289 - 578	24.75
THB 20,001 -30,000 per month	USD 578 - 867	25.50
THB 30,001-50,000 per month	USD 867 - 1443	4.50
Above THB 50,001 per month	Above USD 1443	1.00
not working / students		10.00

12. One-third of respondents are admin / sales assistants. Business owners & freelancers (28%) form the second largest group of users. Students comprise twenty percent of users.

13. Seventy-two percent (72%) own a Nokia, while the remainder is split between various phone makers.

Tanzania

1. Communicating with friends is the most popular use of the mobile internet for Tanzanian surfers, but at 45% this is sixteen percentage points below the network average.
2. Twenty-four percent of Tanzanians surf for entertainment, thirteen percent for information and eleven percent for education. That's the highest response rate for education of any country surveyed and more than twice the network average.
3. Eighty-three percent of Tanzanian users go online at least once a day; about half of these respondents access the mobile internet six or more times a day. Still, there's a fairly big group (11%) who go online less than once a week.
4. Tanzanians spend less time connected to the mobile internet than surfers in other countries. More than one-third of respondents spend 15 minutes or less online each session. Twenty-two percent (22%) surf for 15-30 minutes at a time and another twenty-two percent are online for 30-60 minutes each session. Only twenty percent (20%) spend an hour or more online at a go, the lowest rate for this bracket of any country surveyed.
5. Users surf mainly from home (65%). Twelve percent (12%) surf outdoors or while on-the-go, eight percent while at a desk, six percent at work and another six percent from internet cafés.

6. While users surf throughout the day, morning surfing is relatively high (11%). Usage picks up after lunch (27%), peaks in the evenings (44%) and drops off late at night (15%).
7. Users are keen to use their mobiles for airtime transfers (46%), online games (16%) and payment of café/restaurant bills (11%).
8. Consumer items that are high on Tanzanian wish lists – and which respondents say they are likely to purchase within the next twelve months – are computer peripherals (27%), video game consoles (24%), home entertainment systems (23%) and smartphones (13%).
9. Typical users from Tanzania enjoy outdoor sports (33%), new technology (24%) and family activities (20%).
10. What is your highest education level?

a. Primary school	=	5.80
b. Secondary School	=	47.83
c. Post Secondary (Trade Cert)	=	9.66
d. Diploma, A Level, College	=	25.60
e. University/ Postgrad	=	11.11

11. What is your monthly income?

Including students and those not working, about sixty-two percent (62%) of Tanzanian users earn less than 30,000 Tanzanian shillings per month. The next biggest group though consists of people in this survey's highest

income bracket, those earning more than 50,000 Tanzanian shillings (USD 38) a month.

Earnings	Earnings (USD)	%
TZS 30,000 and below	Below USD 23	19.1
TZS 30, 001 - 35, 000	USD 23 - 27	8.04
TZS 35, 001 - 45, 000	USD 27 - 34	3.02
TZS 45, 001 - 50, 000	USD 34 - 38	3.52
Above TZS 50,000	Above USD 38	23.62
Not working		42.71

12. Thirty-five percent of Tanzanian users are students. Business owners & freelancers (20%) form the second largest group of users, followed by service personnel (20%) and maintenance and technical workers (12%).

13. The top three phone models are Nokia (67%), Motorola (6%) and Siemens and Samsung (2% each).

United States of America

1. Eighty percent (80%) of US users access the mobile internet to communicate with friends via tools like blogs, chats and discussion forums. This is nearly twenty percentage points above the network average and the second-highest communication rate after Thailand.
2. Nine percent of US users surf for information and five percent for entertainment. Utilising the mobile internet for education, transactions and email are all quite low and less than the network average.
3. Just about all US users (96%) go online at least once a day. Sixty-one percent (61%) say they access the mobile internet six or more times a day, well above the 50% network average.
4. Forty-eight percent (48%) of US users spend an hour or more online each session. Eighty-eight percent (88%) spend more than more than 15 minutes at a time online.
5. Eighty four percent (84%) surf from home, seven percent from work and four percent while in transit. Less than 1 percent connect from a computer in an internet café.
6. Surfing activity continues throughout the day; morning activity (16%) dips during lunch (5%) then increases in the afternoon (19%). Activity peaks in the evenings (34%) and continues for many late at night (25%).

7. Users are not as keen as others for airtime transfers (16% against a network average of 34%), but are particularly eager to buy items for online games (27% against a network average of 20%) and payments for groceries (19% against a network average of 7%).
8. Thirty-two percent (32%) expect to buy a console video game system in the next 12 months. Twenty-one percent (21%) plan to buy computer-related peripherals and 25% are planning to get a home entertainment system. Only seven percent (7%) of users are planning to purchase a smartphone (half the 14% network average).
9. Typical users from USA enjoy outdoor sports (49%), family activities (25%) and eating out/pubs/nightclubs (11%).
10. What is your highest education level?
 - a. Elementary School = 1.46%
 - b. Middle School = 4.38%
 - c. Senior High School = 59.85%
 - d. College = 27.01%
 - e. University Degree or Postgrad = 7.30%

11. What is your monthly income?

Including students and those not working, 49% of US users earn less than USD 1000 per month. Another thirty-plus percent earn USD 1000 – 2000 a month.

Earnings (USD)	%
Below \$1000	24.09
\$1000 - \$1500	21.90
\$1501 - \$2000	10.22
\$2001 - \$3000	7.30
\$3001 - \$4000	5.84
\$4001 - \$5000	1.46
Above \$5000	2.92
Not working	24.82

12. Students (22%) and service personnel (21%) from the largest groups of users. Business owners & freelancers (20%) come in at a very close third with executives & managerial positions at only three percent.

13. The top three phone models are Samsung (29%), Motorola (26%) and Nokia (10%).

South Africa

1. Seventy percent (70%) of South Africans use the mobile internet to communicate with friends. Ten percent surf for information and eight percent use mobiles to access games, music, videos and other forms of entertainment.
2. Ninety-five percent (95%) of users access the internet at least once a day. Fifty-five percent (55%) go online six or more times daily.
3. South Africans spend less time online per session than the network average. Thirty-five percent (35%) surf for an hour or more at a time, twenty-four percent (24%) for 30-60 minutes and twenty-six percent (26%) for 15-30 minutes per session.
4. Seventy-seven percent (77%) surf from home, eleven percent at work and four percent while in transit. One percent access mobile internet sites from a computer in an internet café.
5. South Africans access the mobile internet throughout the day, however compared to the rest of the network, they are more likely to surf in the afternoons and less likely to go online late at night. Eleven percent of South African users surf during the morning. Internet usage dips only slightly at lunch (9%), increases in the afternoon (26%) and peaks in the evening (37%). Seventeen percent (17%) of users surf after midnight.
6. Forty-eight percent (48%) of South African users would like to use their mobile phones for airtime transfers, fourteen percentage points above the

- network average. Nearly a quarter of respondents wish they could use their phones to pay bills, buy groceries, purchase tickets and pay for café & restaurant bills. Nineteen percent (19%) are keen to use mobiles to buy items for online games.
7. Consumer items that are high on South African wish lists – and which respondents say they are likely to purchase within the next twelve months – are home entertainment systems (26%), computer-related peripherals (22%) and console video game systems (20%). Only eight percent (8%) of users plan to purchase a smartphone (as compared to a 14% network average).
 8. Typical users from South Africa enjoy outdoor sports (36%), family activities (28%) and TV/Cinema/Music/Fashion (12%).
 9. What is your highest education level?
 - a. Elementary School = 1.46%
 - b. Middle School = 4.38%
 - c. Senior High School = 59.85%
 - d. College = 27.01%
 - e. University Degree or Postgrad = 7.30%

10. What is your monthly income?

Including students and those not working, sixty-five percent (65%) of South African users earn less than 7000 rand per month.

Earnings	Earnings (USD)	%
Below ZAR 7,000	Below USD 723	39.22
ZAR 7,000 - 10,000	USD 723 - 1033	15.20
ZAR 10,001- 14,999	USD 1033 - 1549	8.33
ZAR 15,000 - 19,999	USD 1549 - 2065	6.37
ZAR 20,000 - 24,999	USD 2065 - 2581	0.49
ZAR 25,000 - 30,000	USD 2581 - 3098	2.45
ZAR 30,000 and above	Above 3098	1.96
Not working		25.98

11. Students (26%) comprise the largest group of South African users, followed by business owners & freelancers (20%), Admin/Retail/Sales Assistants (19%) and service personnel (11%).

12. The top three phone models are Samsung (29%), Nokia (25%) and Motorola (10 %).

6. Conclusions / Recommendations

“Who Uses the Mobile Internet and What do they do?”

To answer these questions, BuzzCity surveyed mobile consumers in fourteen markets across Africa, Asia, Eastern Europe, the Middle East and North America. While important regional and country-specific variations do occur (check the individual country profiles), a number of cross-market trends are readily apparent.

First, as highlighted in the Executive Summary, the average mobile internet user is a twenty-something male who surfs frequently for extended periods of time, most often to network and communicate with friends. He is generally in a low income bracket but has money to spend.

Second, mobile consumers want to do more with their phones. They want to conduct more transactions online. The demand for m-commerce and mobile banking is clear. But businesses are either not providing these services in the markets surveyed or they're doing a poor job of publicising them.

Here's a shortlist of the capabilities mobile consumers desire (in order of preference):

1. Transfer airtime minutes
2. Purchase items for use in online games
3. Pay cafe and restaurant bills
4. Transfer money and make remittances
5. Purchase groceries
6. Buy tickets to movies and other events

7. Buy bus and train tickets
8. Pay bills
9. Pay for parking

In addition, there is unsatiated consumer demand for more mobile content, particularly sports and entertainment news.

Offline, mobile surfers also express strong interest in purchasing digital and electronic equipment, such as video game consoles, computers and computer peripherals and smartphones. Some 13% of survey respondents expect to upgrade to a 3G mobile device or other genre of smartphone within the next twelve months, which means this segment of the mobile community will be able to do even more with their phones than they can now.

Recommendations:

1. More businesses, both small and large, need to establish m-commerce sites, particularly to meet demand for the services listed above.
2. Retail banks and telecom carriers need to step up the provision of mobile banking services, particularly money transfers and remittances. (In some markets, informal sector providers are beating banks to the punch.)
3. Electronic and digital product manufacturers should step up mobile branding and marketing initiatives. Where possible, they should also offer online sales.
4. Increase the availability and diversity of virtual gifts. The provision of online and virtual gifts also presents businesses with new branding opportunities.
5. Create and extend online marketplaces like Cellbazaar (www.cellbazaar.com) -- where users can buy and sell merchandise, commission services and make deals – to meet the needs of the growing number of mobile internet users who are freelancers and small business owners. (For more about Cellbazaar, refer to the 7 October 2008 blog entry at <http://gammalife.blogspot.com>.)

We also believe it is worth reiterating the recommendations made in BuzzCity's July 2008 mobile survey, *"The Digital Lifestyle: What more do mobile users want?"* because six months later, businesses still need to listen and pursue these ideas:

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 leading 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 far-reaching advertising, merchant and publisher programs. Additional information can be found at www.buzzcity.com and on our corporate blog, <http://gammalife.blogspot.com>.

For more details about the survey, please contact feedback@buzzcity.com.