



Global Telecoms Insights

2010 Priorities



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What is it?

GTI is an annual consumer survey designed to build a picture of the mobility consumer – their needs, pain points and emerging behaviours



How is it used?

The study is used to help inform brand, channel and product development strategies. The focus of the study is less on understanding what has happened before, and more on providing guidance to what the future holds



What is the coverage?

We cover 35 major international markets and interview a total of 27,000 consumers. We deal with a range of topics from usage patterns, the path to purchase, brand commitment and convergence behaviours



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Prepare for a consumer surge into the device market

- Purchase intent has returned to pre-2008 levels with 55% of consumers looking to purchase a device in the next 6 months, up from 23% a year ago.
- In spite of returning confidence, the industry must help consumers overcome the growing complexity of the category and continue to offer simple and compelling offers.

Consumers are craving simplicity in services

- 43% of consumers are prevented from using services through their mobile due to issues associated with ease of use.
- Remove barriers for consumers; The process of searching for, downloading and using services must be intuitive and seamless.

'Social' will be the backbone that mobile services are built from

- 30% of mobile internet users are now accessing social networks through their mobile, up from 19% last year.
- Consumers don't just want to collect content, they want to create, share and comment on it.

Despite the rise of the internet as a transaction point, ignore the retail store at your peril!

- 79% of purchases are still made in a retail store environment.
- When consumers use internet and retail store touchpoints to research purchases, 74% will end up buying in-store.



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The mobile brand ecosystem is fragmenting

- Google and Facebook are in the top-10 'single most preferred' mobile brands globally.

Touchscreen will be the primary mobile interface of choice

- 20% of consumers intend to buy a Touchscreen device for their next purchase, compared to 9% for Qwerty devices.
- Hybrid devices are also popular.

Emerging Markets are leading, not following

- Mobile music and gaming use in Emerging Markets' urban areas has now surpassed Developed.
- These markets are not following linear development paths, requiring tailored product and service offers, and offering opportunities for unique innovations.

Netbook growth will continue to surpass expectations

- Despite only 4% of consumers actually owning a Netbook, a further 12% claim to be likely to buy one in the near future.
- Of those likely to buy, 16% will be buying a Netbook as their primary PC, potentially eating into higher margin Notebook sales.

