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# Mobinet Index # 3

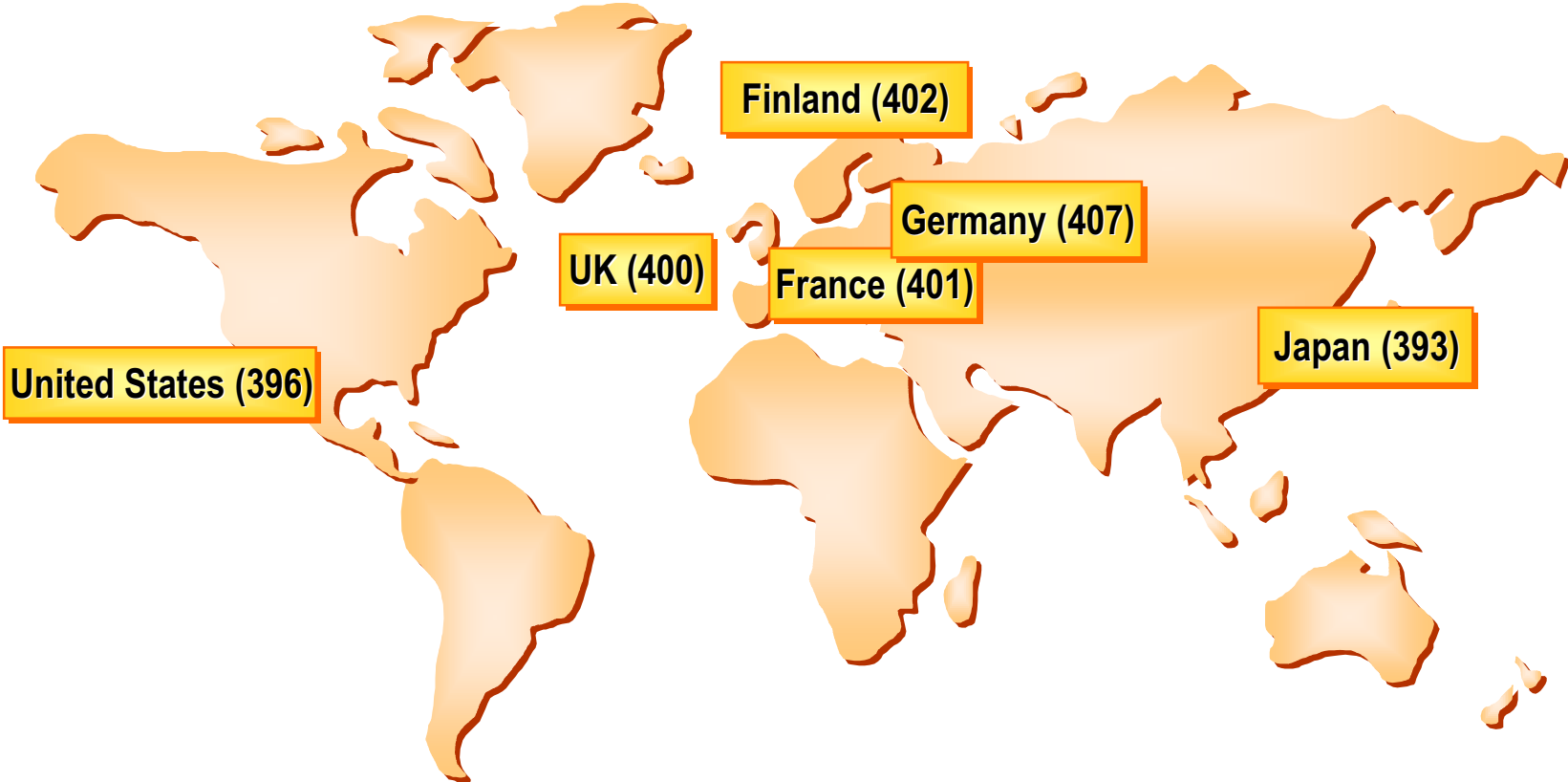
An A.T. Kearney/Cambridge University Collaboration

September 2001

***ATKEARNEY***  
*an EDS company*

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# Mobile users in six countries took part in Mobinet # 3

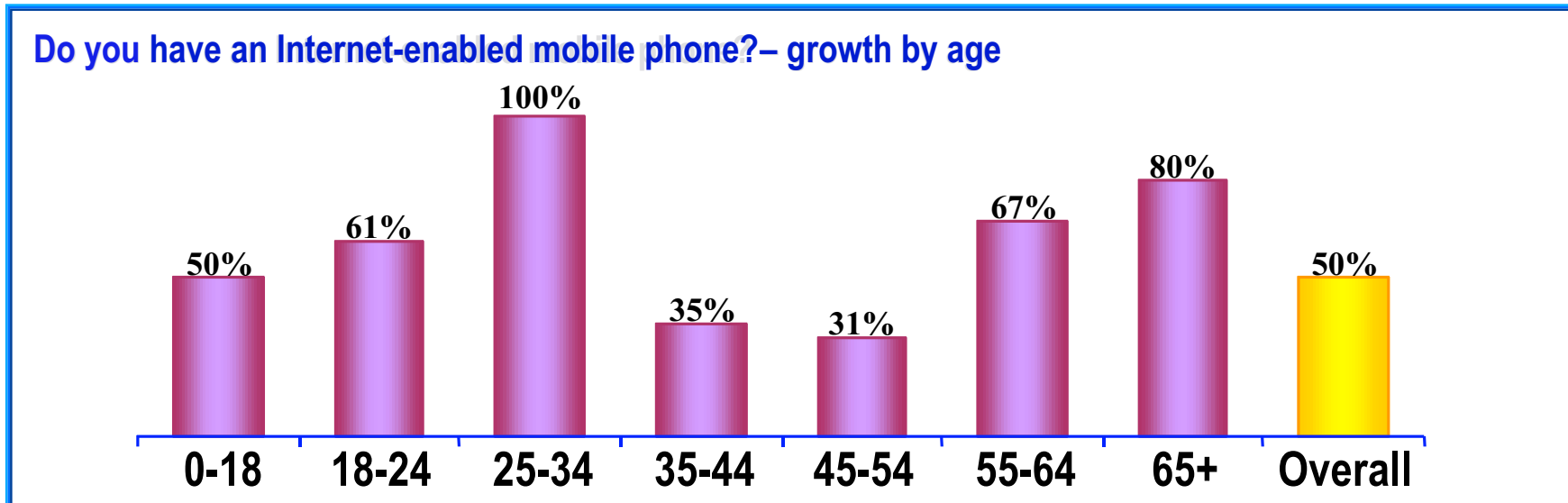
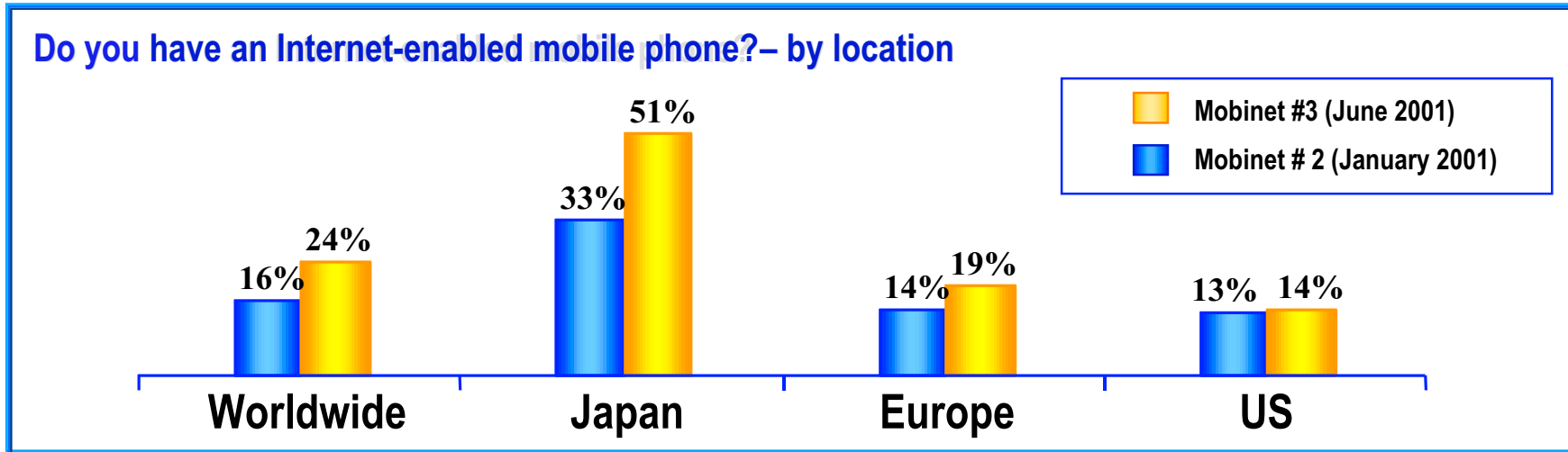


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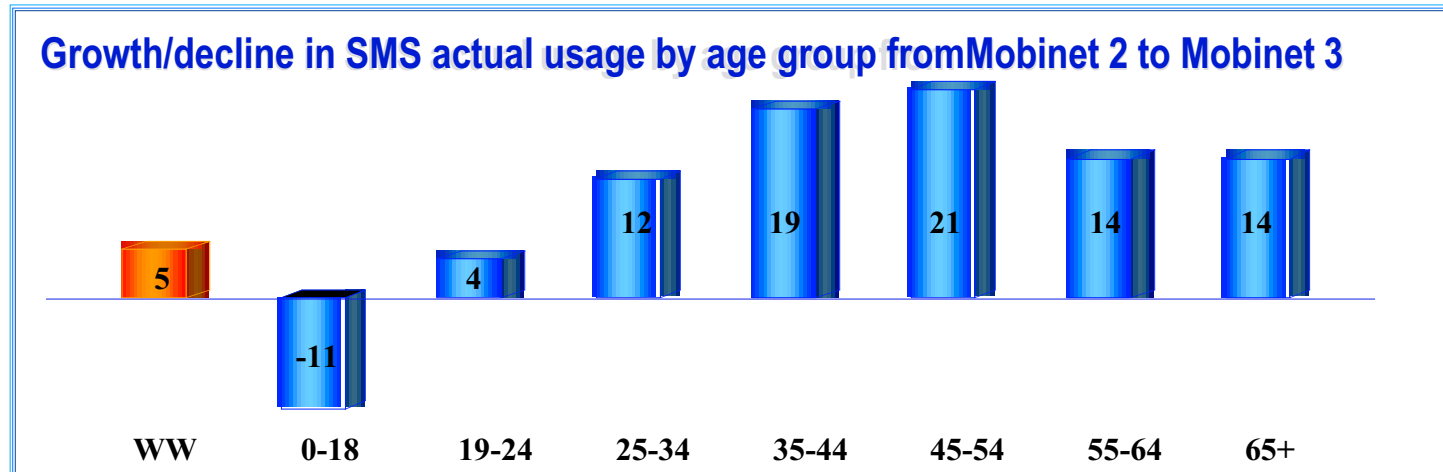
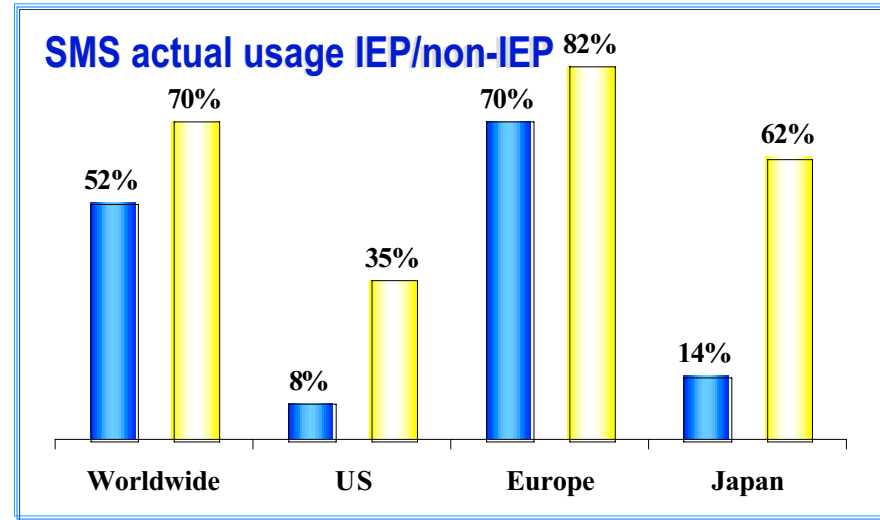
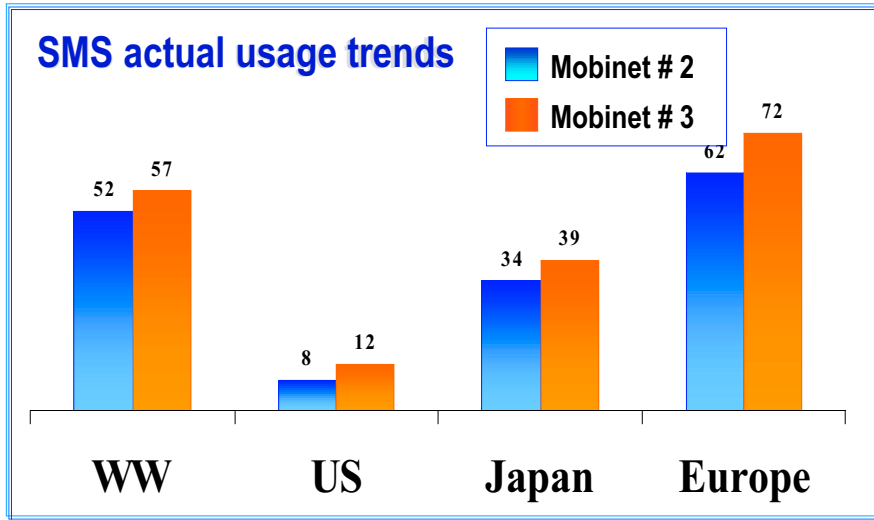
**IEPs (Internet enabled phones) are on the rise, and used mostly for SMS (Short messaging) and e-mail. The phone will be used more and more to carry messaging as well as voice communications, rather than as a purchasing tool.**

- Penetration of internet-enabled mobile phones (IEPs) has risen by half with high growth in Japan and Germany.
- SMS (Short messaging) is being widely adopted among all age groups, a change from Mobinet # 2, which identified younger age groups as the key users.
- All regions show growth in SMS including a sharp increase in the US from a low base
- E-mail is presently highest among 45-54 year-olds, but there is significant growth in all age categories except the over 65 category
- News, sport and weather information use is steady, both today and in future intent
- Actual purchase of goods has trebled but remains below 2% and purchase intent has continued to decline at a rate of 66%.

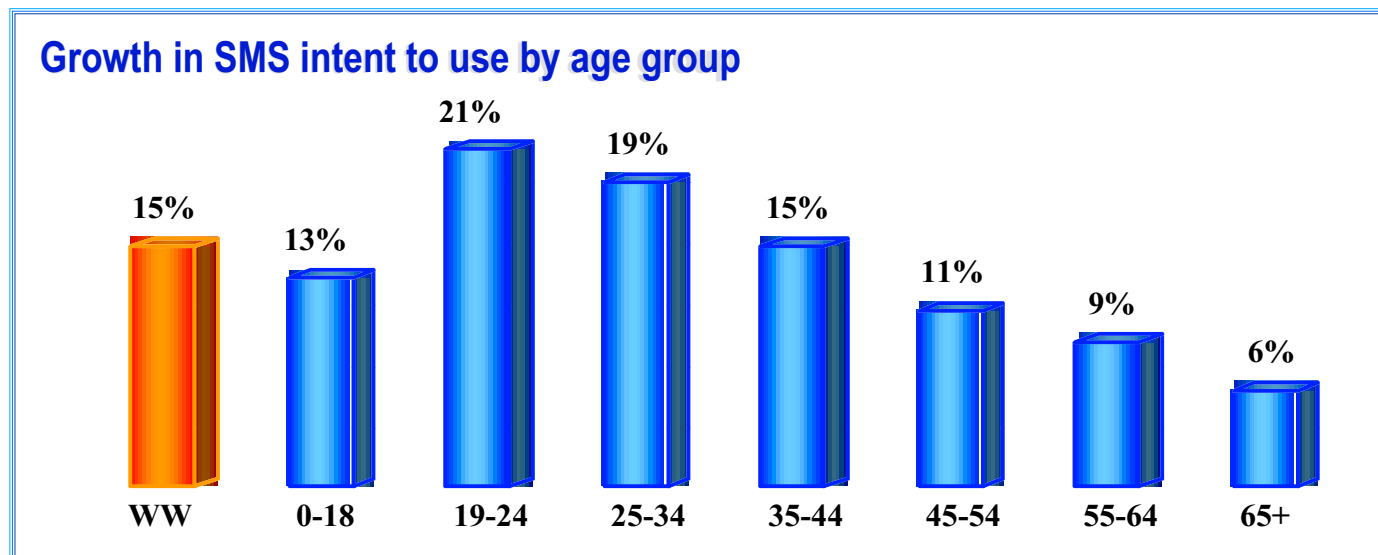
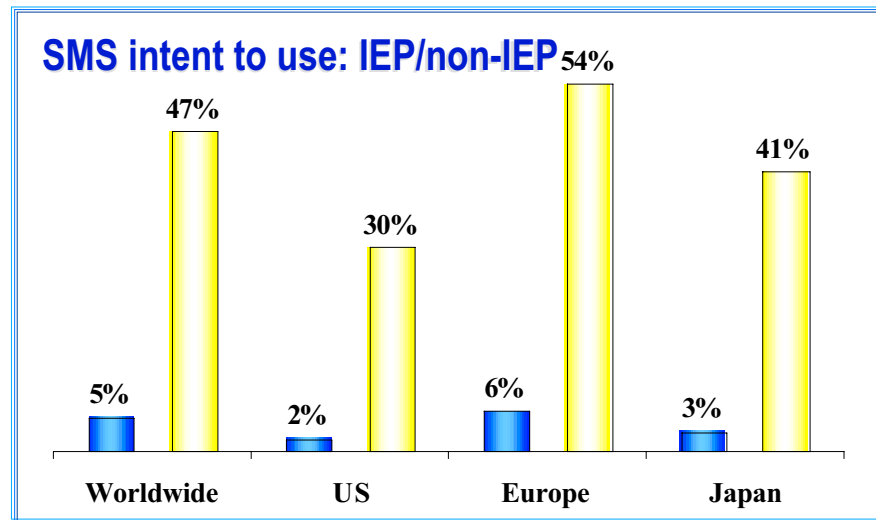
**Penetration of internet-enabled phones has increased by a half, primarily through large increases in Japan(55%) and Germany(36%). Growth comes mainly from younger and older age groups**



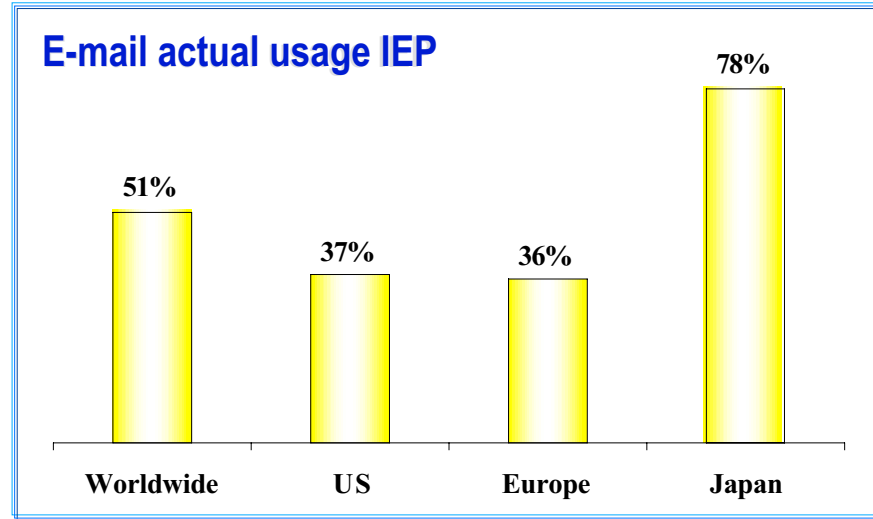
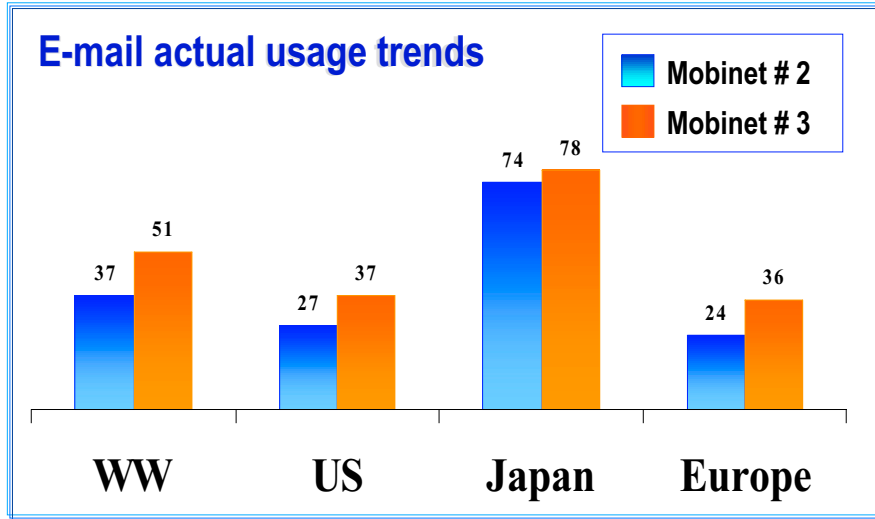
**SMS (short messaging) is growing fast, particularly among Internet enabled users (IEP) in the US and Japan. Usage is growing fastest in middle age groups**



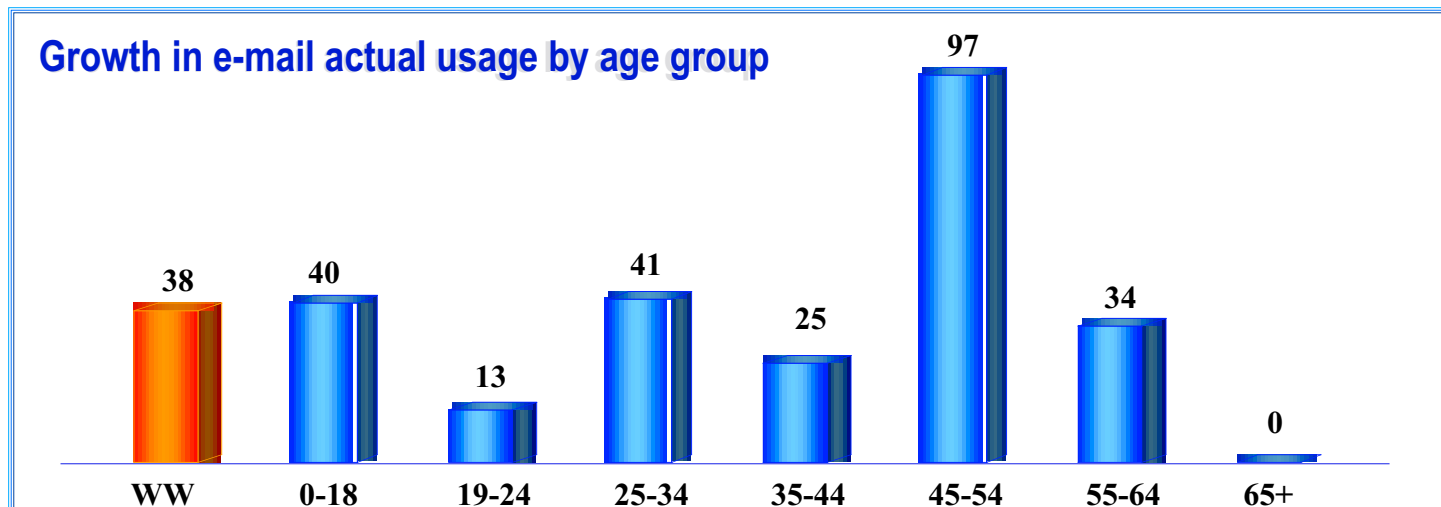
**Half of IEP users plan to use SMS in the future, while non IEP users will only marginally adopt this service. SMS usage will increase in all age groups. American IEP users will be slowest in adopting SMS.**



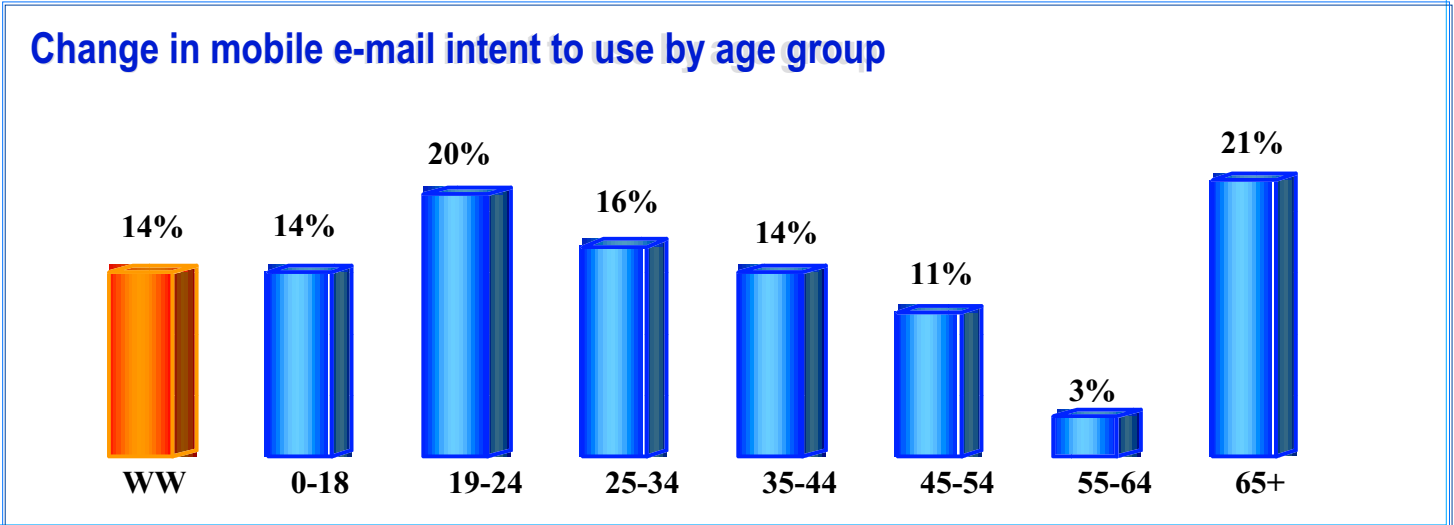
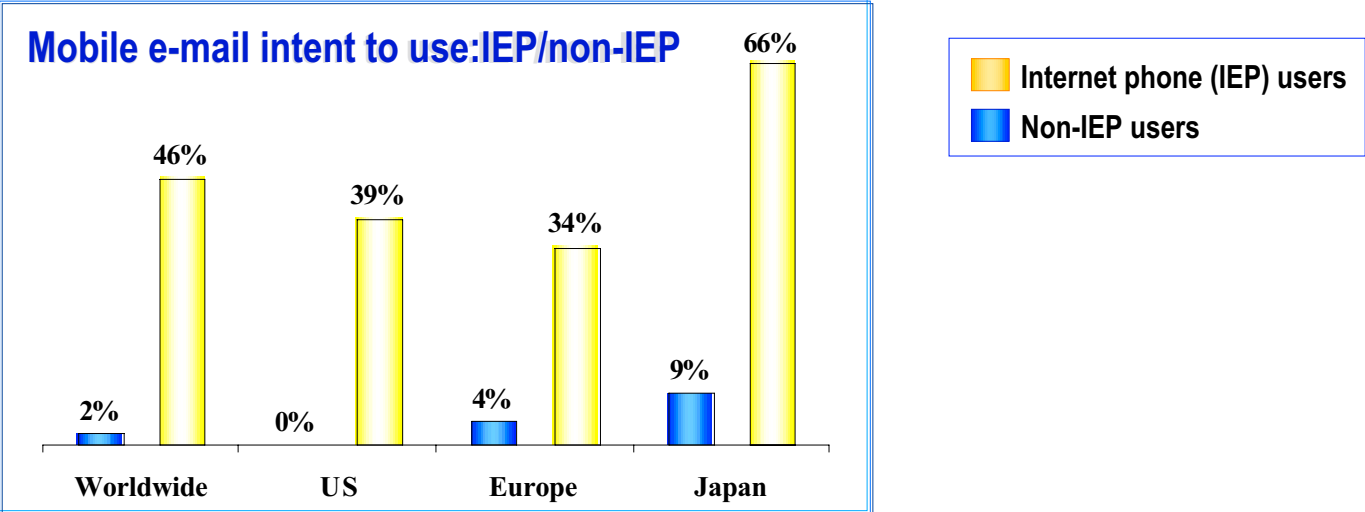
**E-mail usage is at present highest in Japan and Germany and has increased rapidly over the last six months in all age groups, particularly in Europe.**



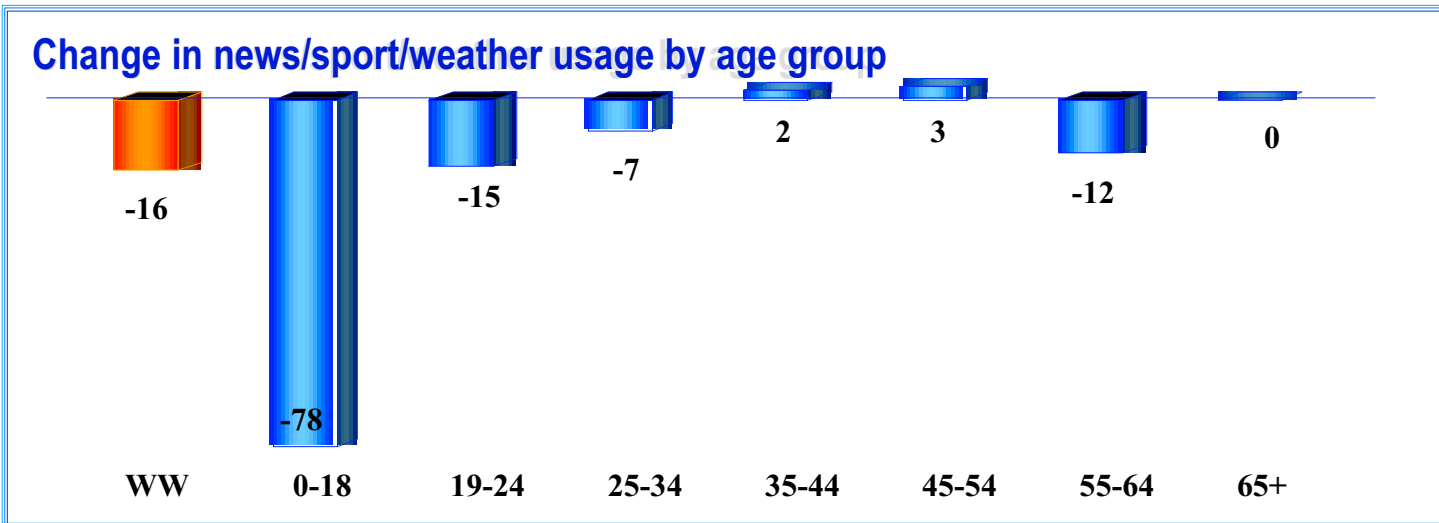
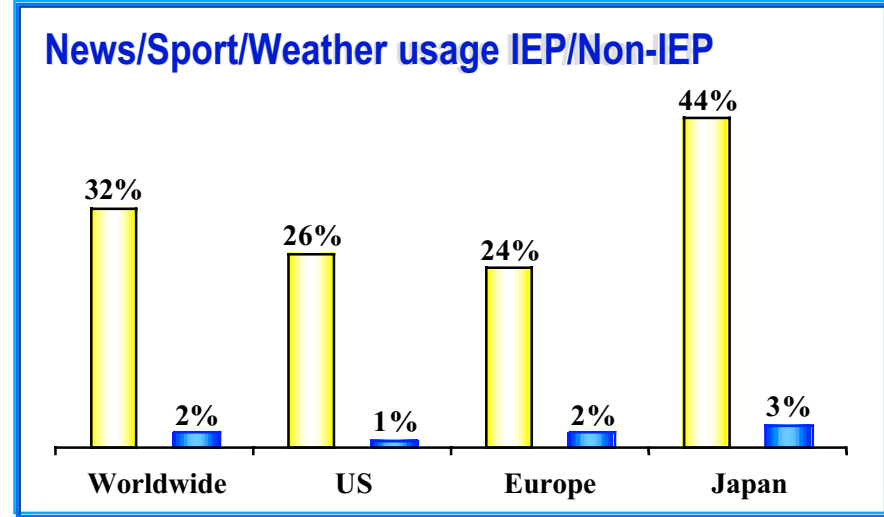
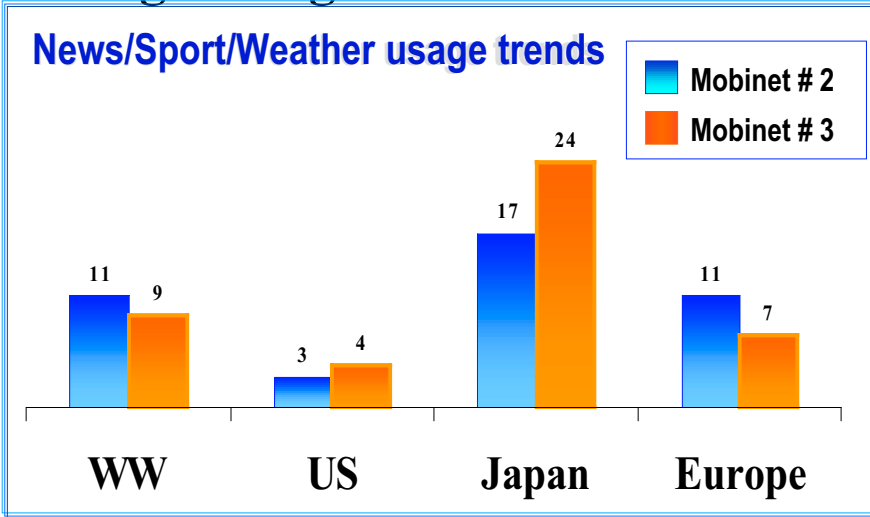
 Internet phone (IEP) users



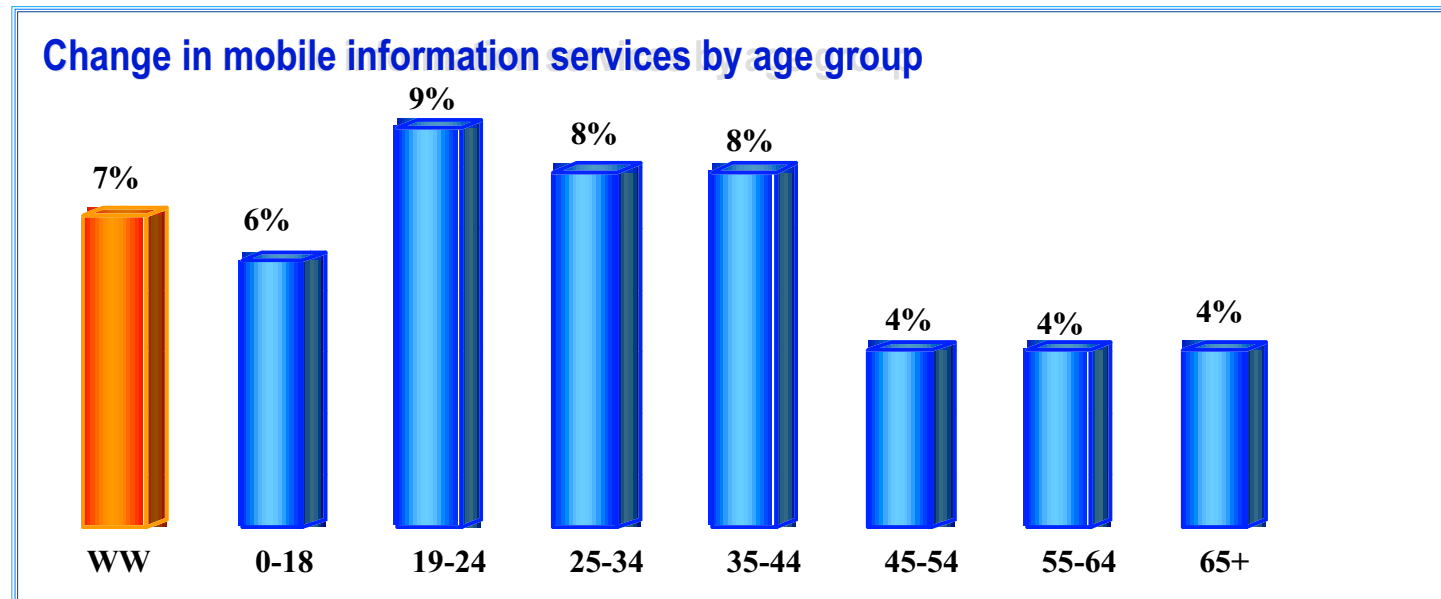
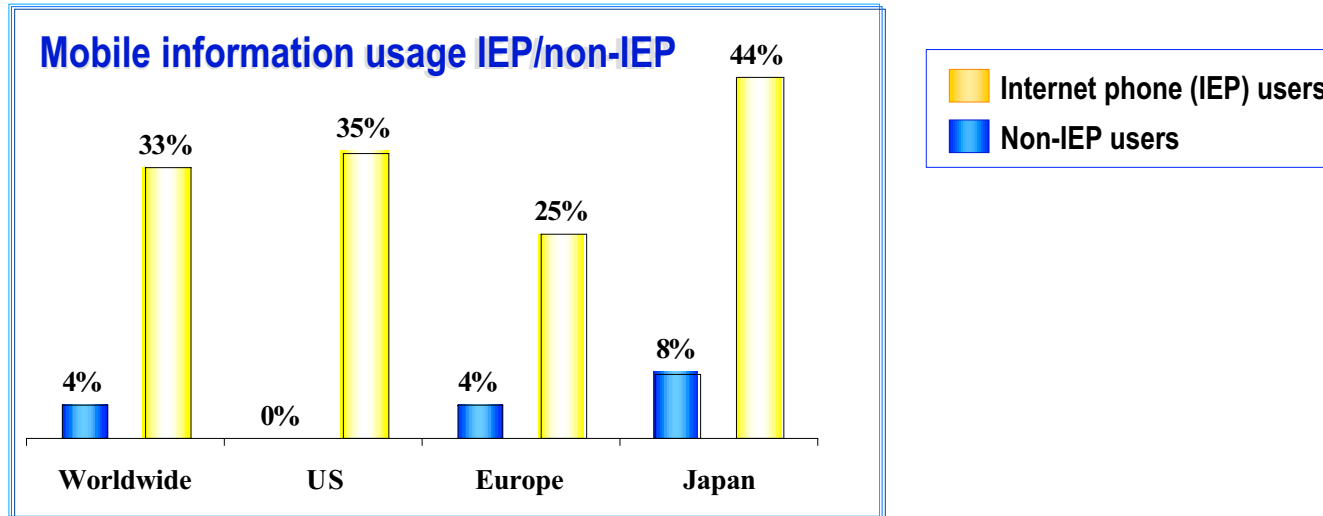
**Half of IEP users worldwide plan to use e-mail from their phones in the future, with a high figure of 66% among Japanese IEP users. Mobile e-mail will be most common among young people and retired people**



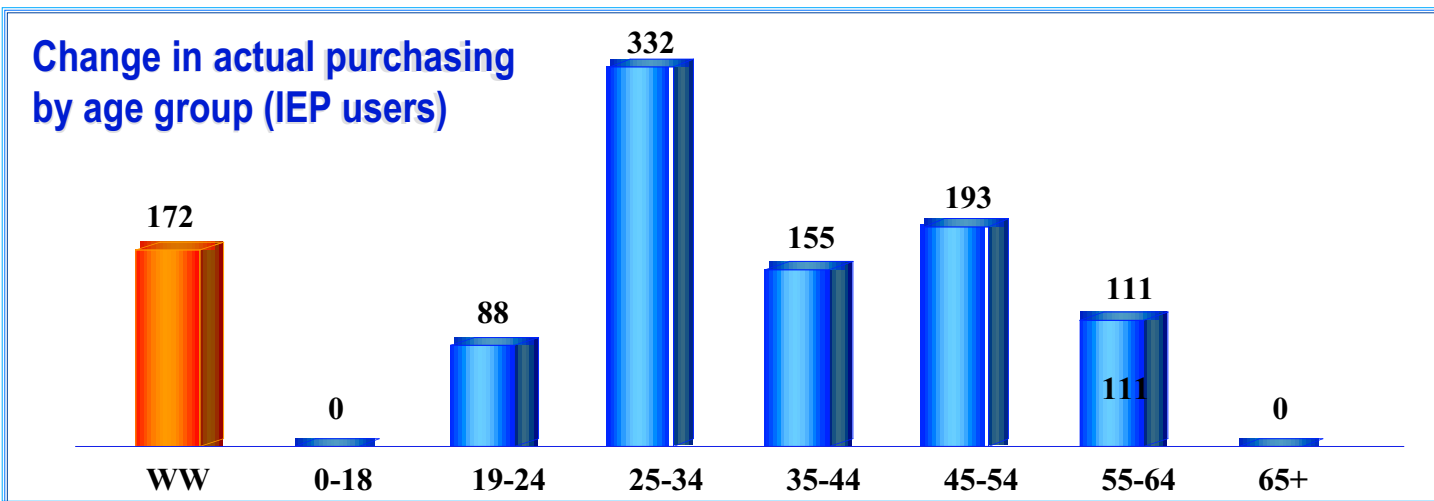
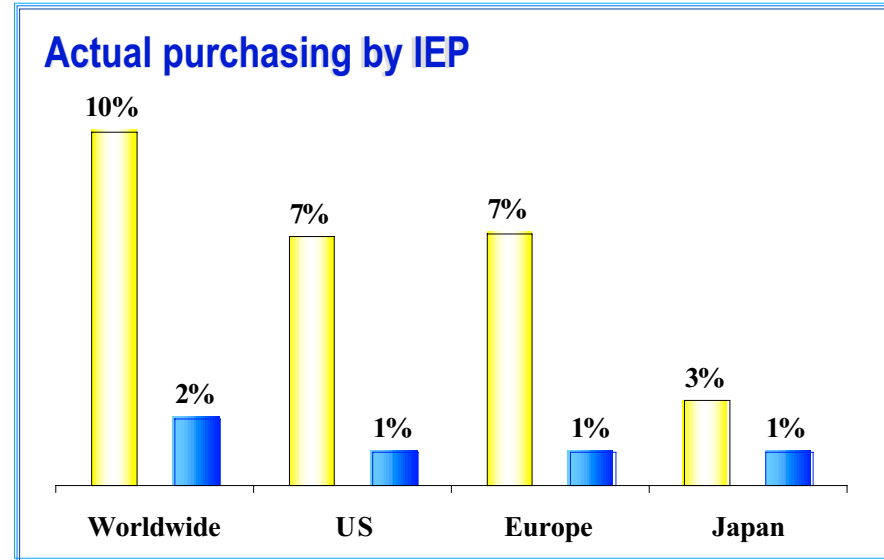
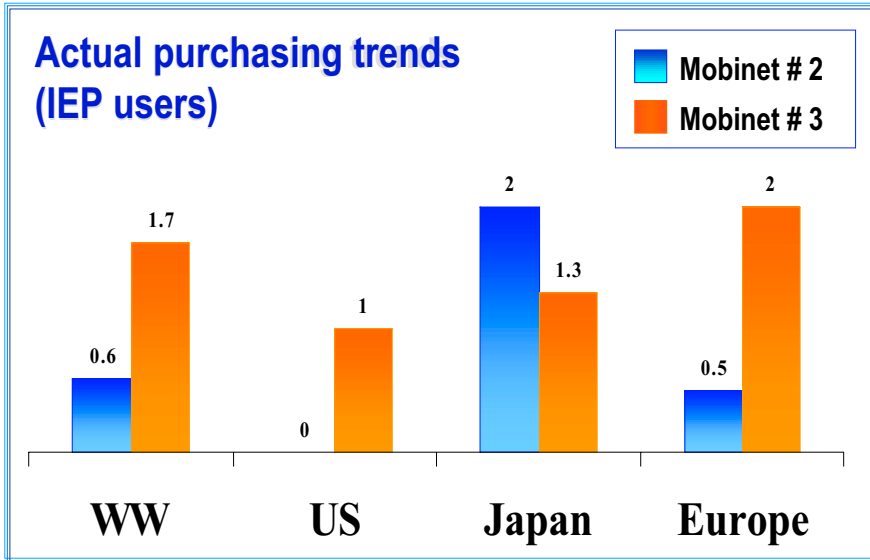
**Information services usage is stable and adopted predominantly by IEP users. Overall usage in Japan and the US has increased but declined in Europe and among teenagers.**



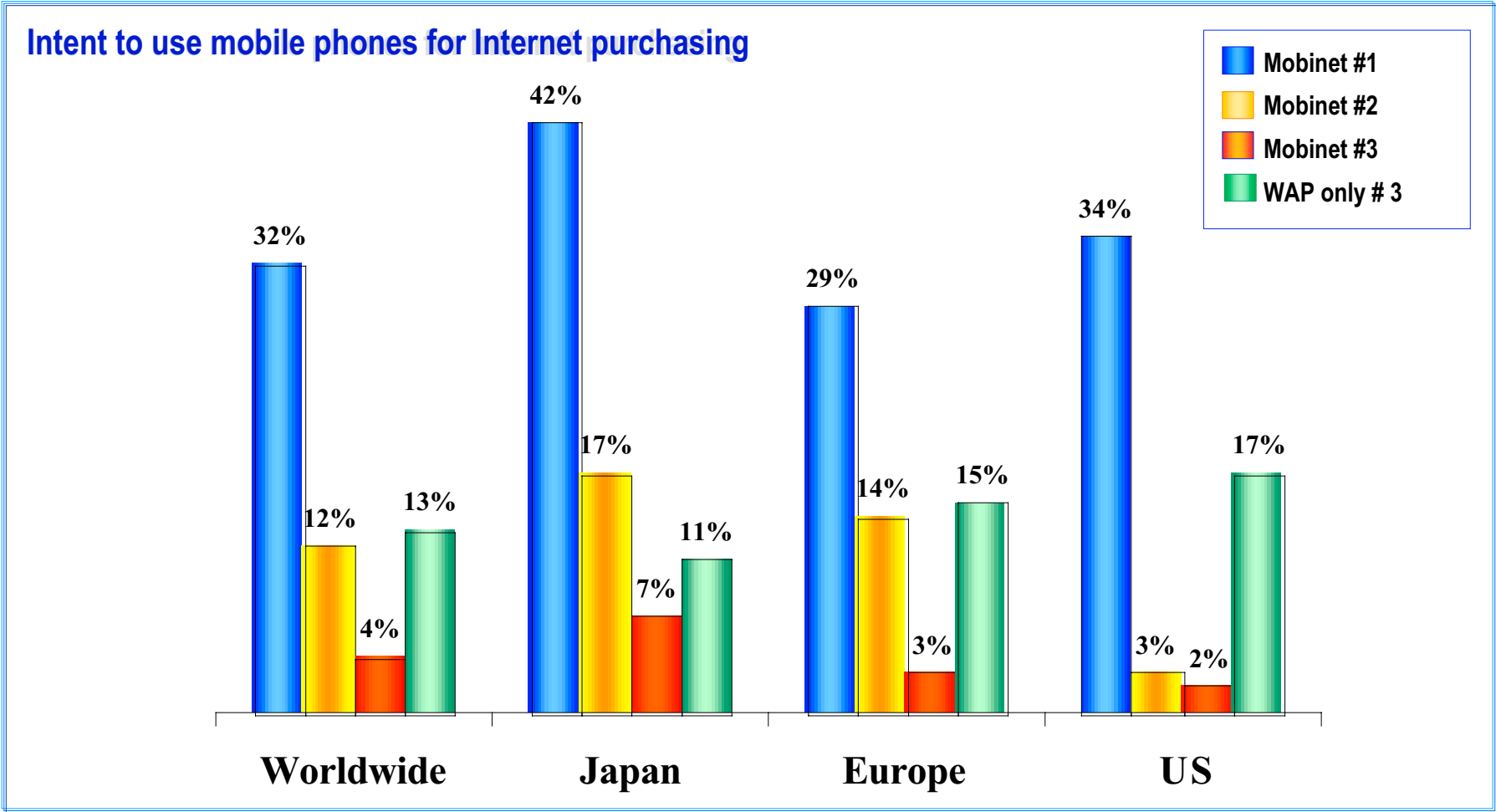
## Mobile information services (weather, news and sports) will be stable in the future, with European IEP users least likely to use



**Purchasing levels remain very low with the exception of Germany, which recorded a level of 7% from nothing in January.**



**In the near future shopping with a mobile phone will be very limited, since intent to use has continued to decline.**



## The key messages for each of the participating countries

### Finland

- Maturity of mobile Internet usage for banking has not led to a wider take up of services except for SMS, in which Finland had the highest percentage result

### France

- The phone remains primarily a means of verbal communication. All results, except for intent to purchase using the PC Internet, are below the world and European averages

### Germany

- Stunning purchasing by IEP – a huge 6.6% of all German respondents have already and 8% intend to. Highest ownership of IEP outside Japan. All other results above the average. All round most positive set of results

### Japan

- Highest IEP penetration and highest growth in SMS, e-mail and news/weather/sport usage, second highest intent to use IEP for purchasing

### UK

- SMS by IEP above average, PC internet penetration and sales strong. Otherwise all figures below average. Lowest intent to purchase by IEP recorded

### US

- Still leads the way in PC Internet penetration and purchasing and now second highest growth in SMS usage by IEP