



# New Communication Trends

Is Mobile poised to grab it all?  
Use-IT Europe Survey - Young Early-Adopters

Market  
Report

The objective on this report is to identify new mobile consumption patterns amongst early adopters, and to predict the degree to which these new behaviour patterns will spread to the mass market. Based on a survey of young early adopters in Europe, this report examines the different communication methods being used, and the associated trade-offs, as well as the most popular types of application and

pastimes.

Celebrating  
[30]  
years

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## Key questions

- How do young people in France, Italy, Sweden and the United Kingdom communicate?
- What are the current and emerging mobile consumption patterns?
- Which is the most popular amongst voice calls, texting, MMS, e-mail and IM?
- What is impact does entering the workforce have on communication patterns?
- What impact do virtual communities have on fixed and mobile communication patterns?
- What are the most widely anticipated new mobile services?
- What are the different categories of young mobile user?
- What are the mainstream consumption trends?



### 1. Methodology

- 1.1. Survey Methodology
- 1.2. Target characteristic

### 2. Users Typology

- 2.1. 6 groups of customers
  - Characteristics and evolution
  - Consumption and trends
  - Fixed internet consumption habits
  - Mobile consumption habits
- 2.2. Group descriptions
  - "Super User"
  - "Community user"
  - "Practical nomad"
  - "M-Followers"
  - "Traditional user"
  - "Wait and see"
- 2.3. Data set
  - Personal Equipment
  - Communication usages
  - Fixed Internet usages
  - Interest for data mobile services

### 3. Consumption Trade-offs

- 3.1. Hardware trade-offs
  - Home equipment
  - Personal equipment
  - towards multiple mobile device ownership
  - toward more ergonomic terminals
  - number of terminals
  - Terminal trade-offs
  - Broadband subscription
- 3.2. Communication trade-offs
  - Communication behaviour
  - Consumption trends
  - Choosing a way of communication
  - overall choice criteria
  - communication patterns shaped by the subscription contact
  - time spent communicating deemed useful/frivolous
  - switching between communication modes
- 3.3. Time trade-offs
  - Time spent watching TV, by age group
  - Time trade-offs, by social status
  - Digital life vs. real life

### 4. Mobile consumption habits

- 4.1. Switching from fixed to mobile
  - Current fixed calling habits
  - New behaviour patterns on the fixed internet
  - social networking

- from virtual to real life
- user-generated content
- instant messaging and multi-tasking
- 4.2. New habits and future patterns
  - Mobile data consumption patterns
  - Fixed and mobile consumption habits
  - Mobile data service drivers
  - Mobile phone at home for browsing the Web
- 4.3. Address book features
  - Interest
  - Focus on a close-knit community
- 4.4. Opinions
  - Mobile and privacy
  - Dependence on mobiles
  - Fears about mobiles

### 5. Market Evolution: 10 Key-messages

- 5.1. Terminal: the end of the "Swiss army knife" mobile terminal
- 5.2. Voice is not dead
- 5.3. Fixed voice being replaced by mobile voice
- 5.4. Double play bundles limiting fixed-mobile substitution
- 5.5. Eventually, a unified fixed-mobile handset for all voice calls
- 5.6. Entering the workforce stimulates asynchronous consumption: e-mail, texting
- 5.7. IM gobbled up by social networks
- 5.8. New forms of communication emerging
- 5.9. What killer app for mobile?
- 5.10. Digital communication will not kill real life communication

### 6. Evolution by Service

- Service
- Short and long-term development
- Drivers and barriers
- Competition

### 7. Data Book by Country

- For France, Italy, Sweden and the UK
- 7.1. Consumption trade-offs
  - Hardware trade-offs
  - Communication trade-offs
  - Time trade-offs
- 7.2. New mobile consumption habits
  - Switching from fixed to mobile
  - New mobile consumption habits and expected future patterns
- 7.3. Opinions

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- Use-IT 2008 (France)
- Advertising: Media, Internet, Telecoms
- Web 2.0 & Social Networking
- Mobile TV Broadcast

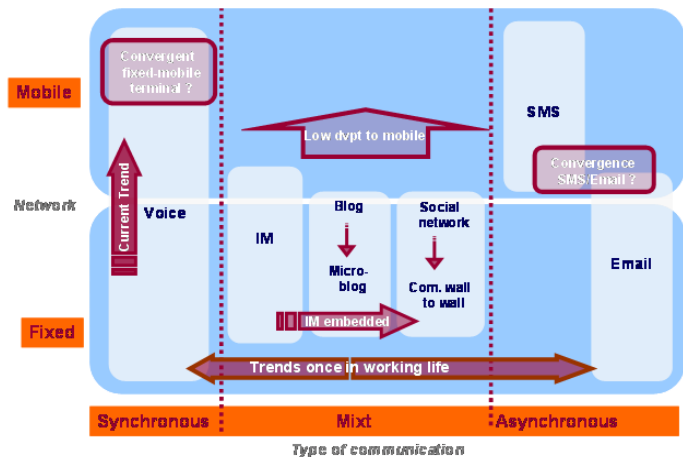
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## Use-IT Europe – Analysing future consumption patterns

The Use-IT programme for 2008 seeks to compare young users' consumption habits to be able to identify emerging trends and assess their spread to the mass market.

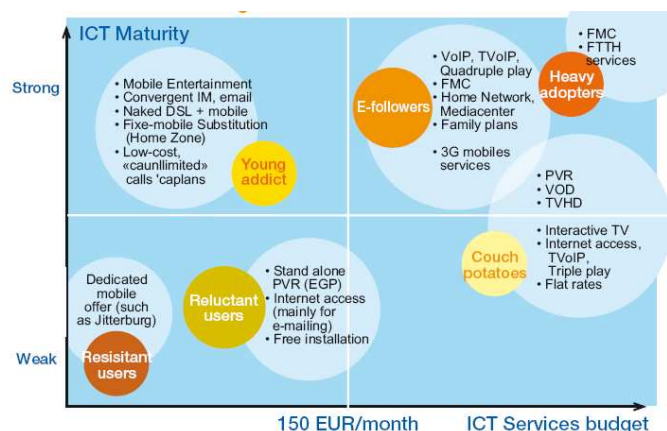
- **Two focus groups** (Paris, Helsinki)
- **A quantitative survey**
  - Online questionnaire (25 minutes long)
  - Target: young internet users
  - Four countries: France, Italy, Sweden and the UK
  - Size of the sample 1,448 individuals (360 per country)
- **Outlook for future consumption patterns, cross-referenced with IDATE market forecasts**



## Methodology – IDATE's Use-IT programme

For over five years now, IDATE has continued to develop a programme devoted to analysing consumer behaviour based on a series of exclusive surveys. The goal is to produce a report on users' changing behaviour patterns through in-depth analysis of the way they currently consume, and predict they will in future consume telecommunications, internet, TV and video, video games, music...

- **Cross-section analysis of ICT consumption habits in the consumer market**
- **New consumption patterns and trade-offs**
- **Monitoring an operational user typology**
- **Cross-referencing survey results with IDATE's sector-specific analyses**
- **Market forecasts and development outlook**



## Structure of the data delivered, by country

### 1. Consumption trade-offs

#### 1.1 Hardware trade-offs

##### Home equipment

- TV set
- DVD Player
- Home console
- TV HD
- BB access
- DVR

##### Personal equipment

- mobile phone
- mobile phone with camera/video camera
- portable PC
- portable PC with 3 G phone as modem
- mini-laptop
- mini-laptop with data modem
- mobile handset with Qwerty keyboard
- webpad and internet tablet
- touch screen (iPhone)
- portable video player
- MP3 player
- video game console
- handheld console
- mobile BB subscription

##### Terminal trade-offs PC/Mobile

- mobile phone
- PC

##### Best configuration

- mobile + laptop
- mobile phone
- smartphone
- mini laptop + mobile

#### 1.2 Communication trade-offs

##### Communication behaviour

- talk on landline phone
- talk on mobile phone
- talk on PC over Internet (VoIP)
- texting
- send MMS
- send e-mail
- chat online on instant messaging
- chat online on forums/website/blogs
- spend time with friends in person

##### Trends in communication habits

*Impact of entering the workforce on communication habits*

- talk on landline phone
- talk on mobile phone
- texting
- MMS
- e-mail
- chat online on instant messaging
- chat online on forums/logs/websites
- read blogs/watch personal videos online
- post content online (comments, texts, photos, videos)
- time spent online
- time spent with friends in person
- time watching TV

##### Expected changes in consumption patterns

- voice calls
- texting
- MMS
- e-mail
- chat online on IM
- read blogs/watch personal videos online
- time spent online
- time spent with friends in person
- time spent watching TV

##### Choosing which way to communicate

*Criteria for choosing which way to communicate*

- reason for the communication
- the person being contacted (parents/friends ...)
- the device used by the person you are contacting
- the expected length of the communication
- time of day (morning, afternoon, evening, night)
- estimated cost
- whether the person you are contacting is available
- your location (public transport, home ...)
- the location of the person you are contacting

##### Communication modes by type of contact

*(Voice, texting, e-mail, fixed IM, blogs, forums)*

- close friends
- friends (pals)
- friends made online
- family
- workplace
- colleagues
- 

##### Criteria applied to the choice, according to the reason for the communication

- tell a friend about the new clothes you bought
- declaration of love
- plan meet-up with a friend
- plan meet-up with several friends
- let people know how you feel
- shoot the breeze
- send a personal video to a friend



## Switching between communication modes

- Switching from IM to phone call
- type of communication used when switching from fixed IM (fixed line, Mobile, VoIP)

## Portion of the communication estimated useful/frivolous

- voice on landline phone
- voice on mobile phone
- texting
- e-mail
- fixed IM
- blogs, forums

## 1.3 Time trade-offs

### Average time spent per day by terminal & type of service

- live TV (time spent per day)
  - on TV set, on PC, on mobile handset
- time-shifted TV (time spent per day)
  - on TV set, on PC, on mobile handset, on video game console
- short videos (time spent per day)
  - on PC, on mobile handset
- surfing the web (time spent per day)
  - on PC, on mobile handset

### Time spent by type of service, by country

- IM
- live TV
- time-shifted TV
- short videos
- browsing the web
- commuting

## 2. New mobile uses

### 2.1 Fixed to mobile transposition

#### Fixed Internet uses

- VoIP
- Make video calls
- Update your blog
- Read blogs/watch personal videos online
- Post comments, photos, videos on blogs/websites
- Download music
- Listen to music
- Watch short videos
- Watch broadcast TV
- Read news
- Get driving directions
- Access your bank account
- Contact administrations
- Buy products/services online
- Find information on products/services before buying

## Social network

### Belonging to a social network

- VoIP
- Make video calls
- Update your blog
- Read blogs/watch personal videos online
- Post comments, photos, videos on blogs/websites
- Download music
- Listen to music
- Watch short videos
- Watch broadcast TV
- Read news
- Get driving directions
- Access your bank account
- Contact administrations
- Buy products/services online
- Find information on products/services before buying

### Social relations on the Internet

- Has made new friends online
- Meets online friends in real life

### User-generated content

- Post personal creation online (photos, videos, stories)
- Remix content found online
- Receive feedback on the content posted

### Instant messaging and multi-tasking

*Average time per day using fixed IM*

*Multi-tasking while using IM*

- Watching TV
- Listening to the radio
- Listening to music
- Making a regular phone call
- Making a VoIP call

### Link to fixed IM

- As soon as I come home, I log onto my instant messaging group

### 2.2 New mobile consumption habits and expectations

#### Perception of video calling

- Video calling mainly with people who live far away
- I would like all my calls to be video calls



## Mobile data uses

- **Communication**
  - Mobile instant messaging
  - Make video calls on your mobile
  - Visit blogs/forums
  - Update your blog with your mobile handset
  - Notification when someone posts a comment on your blog
- **Entertainment**
  - Listen to music on your mobile phone
  - Download music onto your mobile
  - Watch short videos on your mobile
  - Watch broadcast TV on your mobile
  - Reading news on your mobile
  - Locate friends
  - Being located by friends
- **Practical**
  - Get driving directions
  - Access your bank account on your mobile
  - Access e-government services
  - Buy products/services online
  - Find information on products/services before buying
  - Book a ticket using your mobile
  - Receive special offers from nearby stores
  - Pay with your mobile
  - Programme your home video recorder from your mobile

## Mobile data service take-up drivers

### Mobile data service take-up drivers

- **Drivers to increase mobile Internet browsing**
  - larger screen
  - handy keyboard
  - longer battery life
  - better price
  - unlimited access plan
- **Drivers to increase mobile IM consumption**
  - larger screen
  - handy keyboard
  - longer battery life
  - better price
  - compatibility with other IM applications
  - unlimited access plan
- **Drivers to increase mobile TV consumption**
  - larger screen
  - handy keyboard
  - longer battery life
  - better price
  - unlimited access plan

## Address book features

### Desired address book features

- Availability (person available to take a call)
- Detailed availability
- Whether the person you are calling has their mobile switched off
- When the person will be free
- Caller ID and call log
- Which operator the person you are calling uses
- Whether the contact person has a 3G handset
- Whether the terminal can receive your MMS
- Whether you can establish a video call
- The country where the person you are calling is located
- The city where they are located
- Their precise location
- Any additional charges applied to the call

## Address book features

- **Availability**
  - Availability
  - Detailed availability
  - Whether the person you are calling has their mobile switched off
  - When the person will be free
  - Caller ID and call log
- **Features associated with the device**
  - Which operator the person you are calling uses
  - Whether the contact person has a 3G handset
  - Whether the terminal can receive your MMS
  - Whether you can establish a video call
- **Location**
  - The country where the person you are calling is located
  - The city where they are located
  - Their precise location
  - Any additional charges applied to the call

## Focus on availability

## Focus on close-knit community

## Use of groups to supply information on the contact

## Fixed-mobile synchronisation

# 3. Opinions

## Views on mobile phone use and communication

- **Privacy**
  - I easily give my mobile phone number to someone I've just met
  - I easily give my mobile phone number to a friend of a friend
  - I easily give my IM address to someone I've just met
  - I easily give my IM address to a friend of a friend
  - I easily give the address of my blog to someone I've just met
  - I easily give the address of my blog to a friend of a friend
  - Sometimes, I forget that anybody in the world can visit my blog and has access to my private life
  - I would like to be able to control the calls I receive more easily
- **Dependence on mobile phone**
  - I feel vulnerable without my mobile
  - I like to be reachable all the times
  - I need to turn off my mobile phone to feel free
- **Fears**
  - I fear that my mobile could be spammed
  - I fear that the data stored on my mobile phone could be hacked
- **Communication modes**
  - I could easily communicate without speaking
  - As soon as I come home, I log onto my IM group
- **Video Call**
  - Video call is essentially for contacting people who are far away
  - I would like all my calls to be video calls
- **Technological**
  - I love technological innovations

