

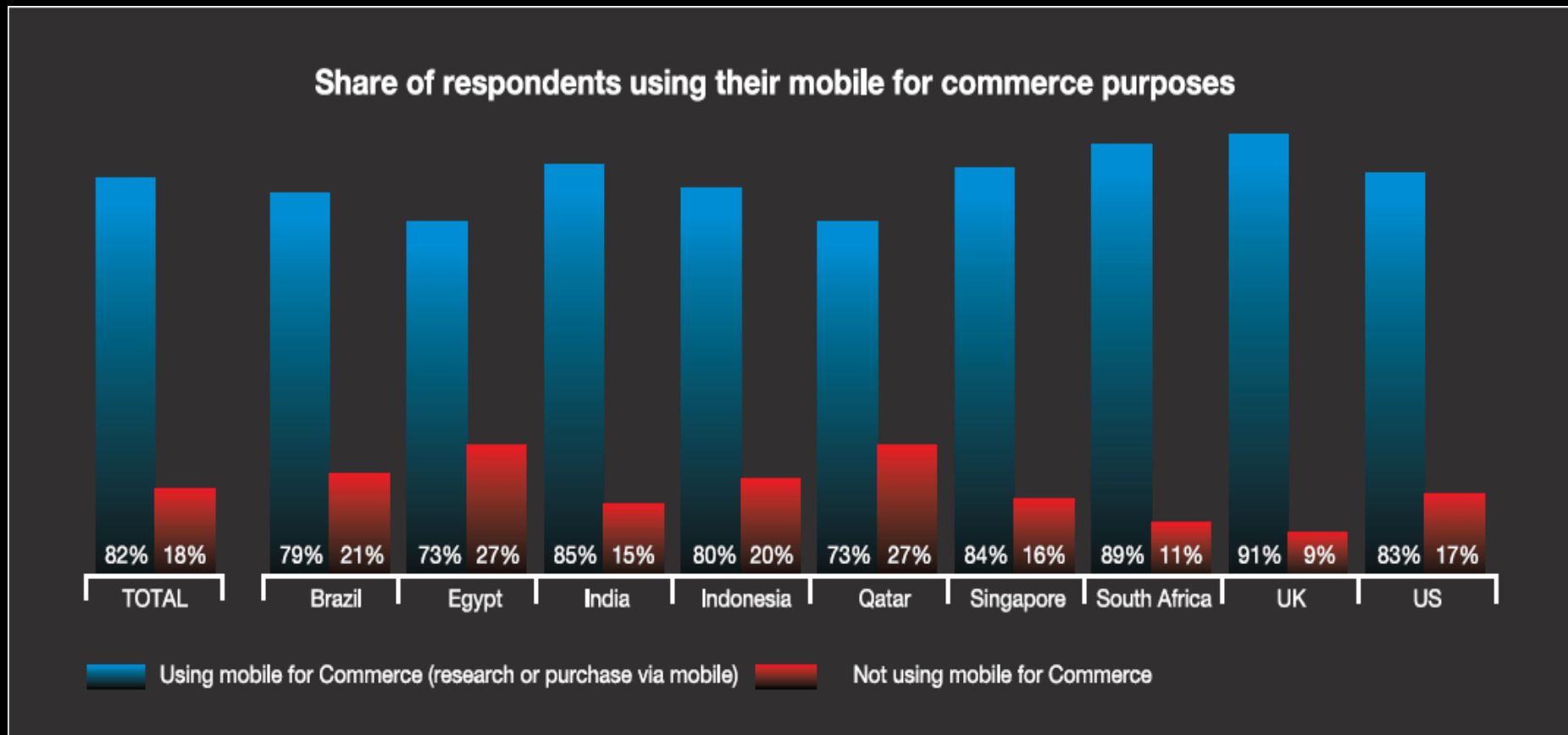
An International Perspective for 2012

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MEF Global Consumer Survey Key Findings

- Carried out for MEF in Q3 2011
- 8,350 respondents, across nine countries and five continents
- It gives us an international picture of:
 - Do consumers buy on their phones?
 - What they buy
 - How they buy
 - Why they DO buy
 - Why they DON'T buy
- It helps us identify the key issues facing our industry...
- ...so that we can take the right actions

MEF Global Consumer Survey Do they Buy? – Geographic Breakdown



Source: MEF Global Consumer Survey 2011
Base=8,530 feature-and smartphone owners in 9 countries

MEF Global Consumer Survey What they Buy

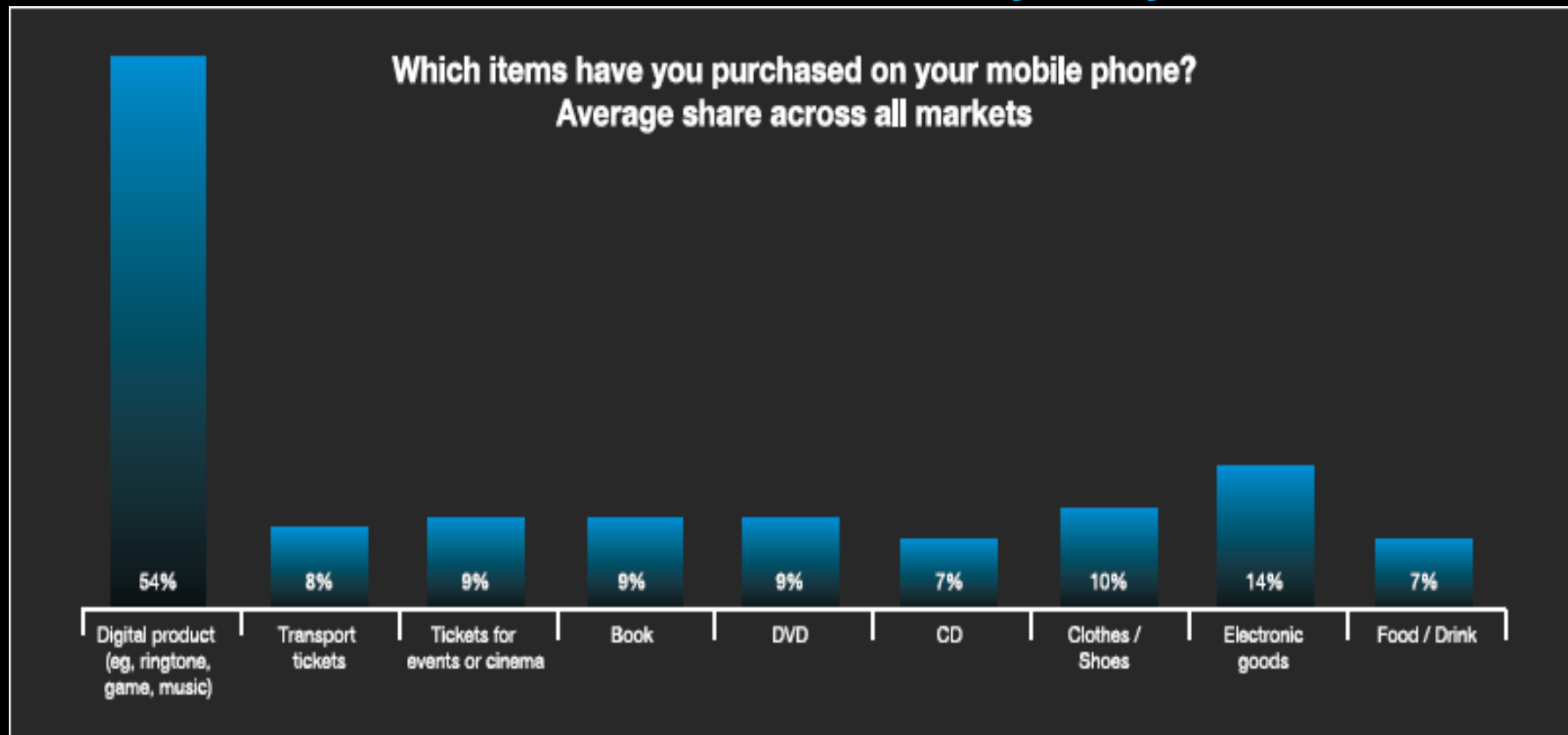


Figure 8
Source: MEF Global Consumer Survey 2011
Base=6,071 respondents who have purchased by mobile

MEF Global Consumer Survey How they Pay

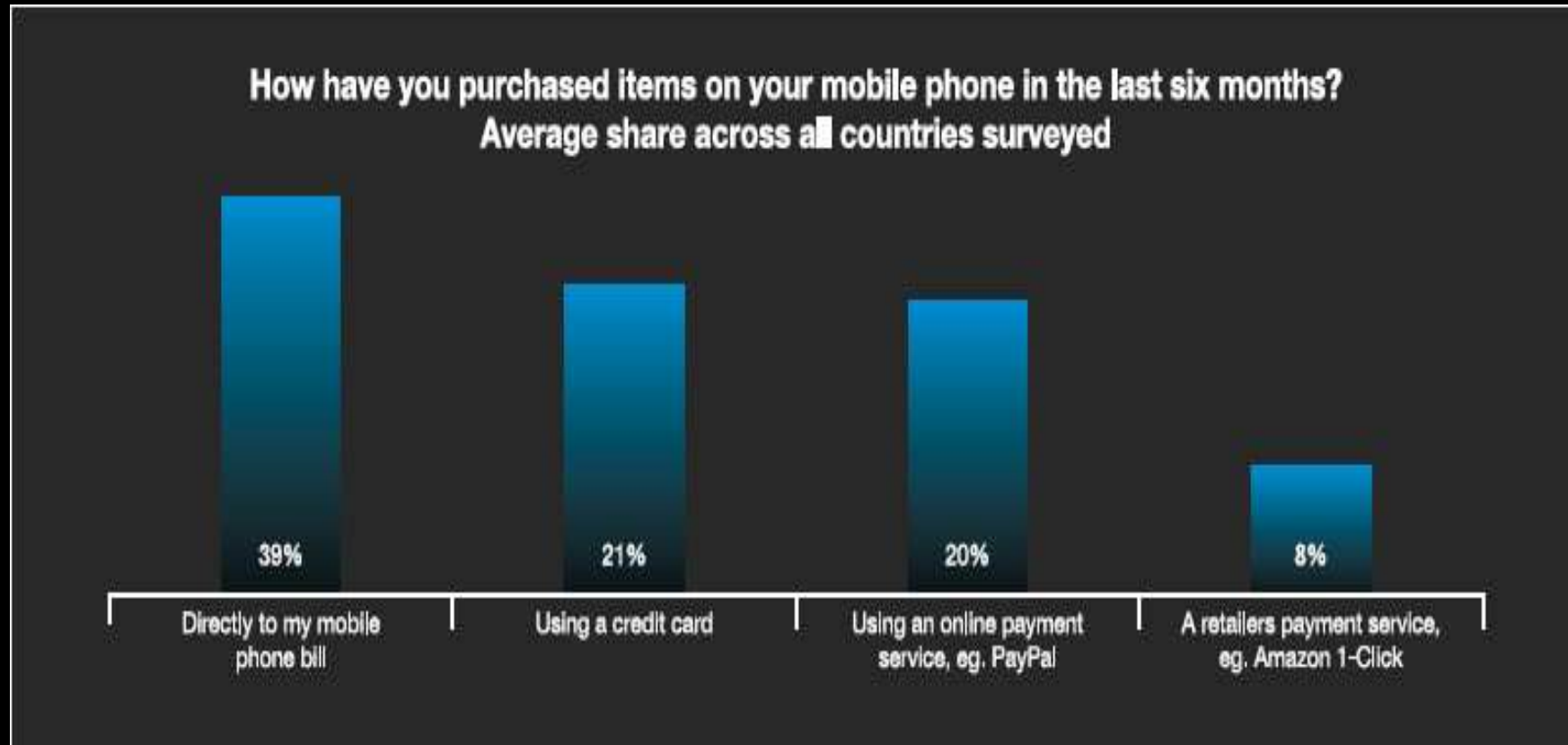


Figure 23
Source: MEF Global Consumer Survey 2011
Base=6,071 respondents who have purchased by mobile

MEF Global Consumer Survey Why they DO Buy

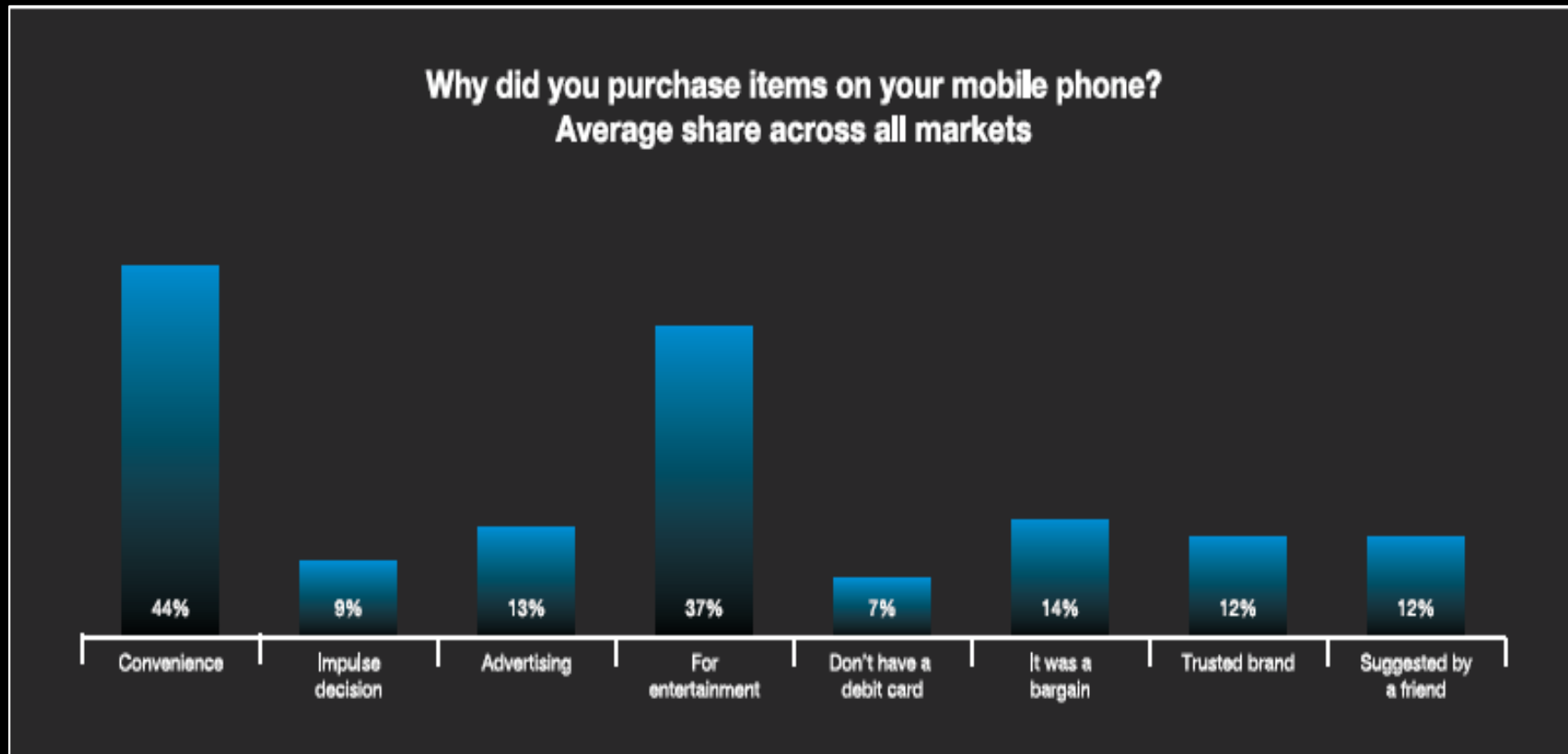


Figure 10

Source: MEF Global Consumer Survey 2011

Base=6,071 respondents who have purchased by mobile

MEF Global Consumer Survey Why they DON'T Buy

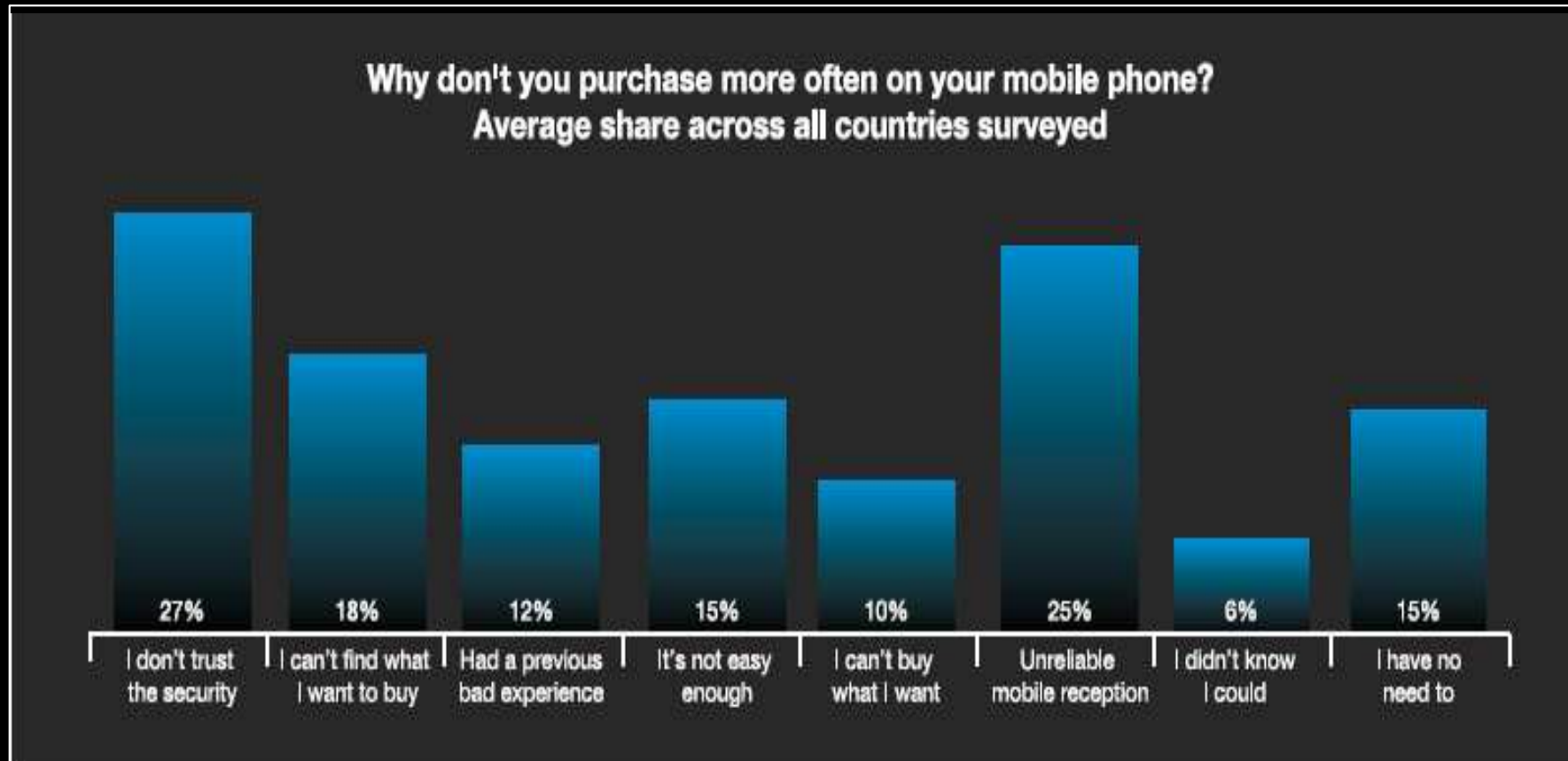


Figure 29

Source: MEF Global Consumer Survey 2011

Base=8,530 feature-and smartphone owners in 9 countries

MEF Global Consumer Survey

Why they DON'T Buy – By Geography

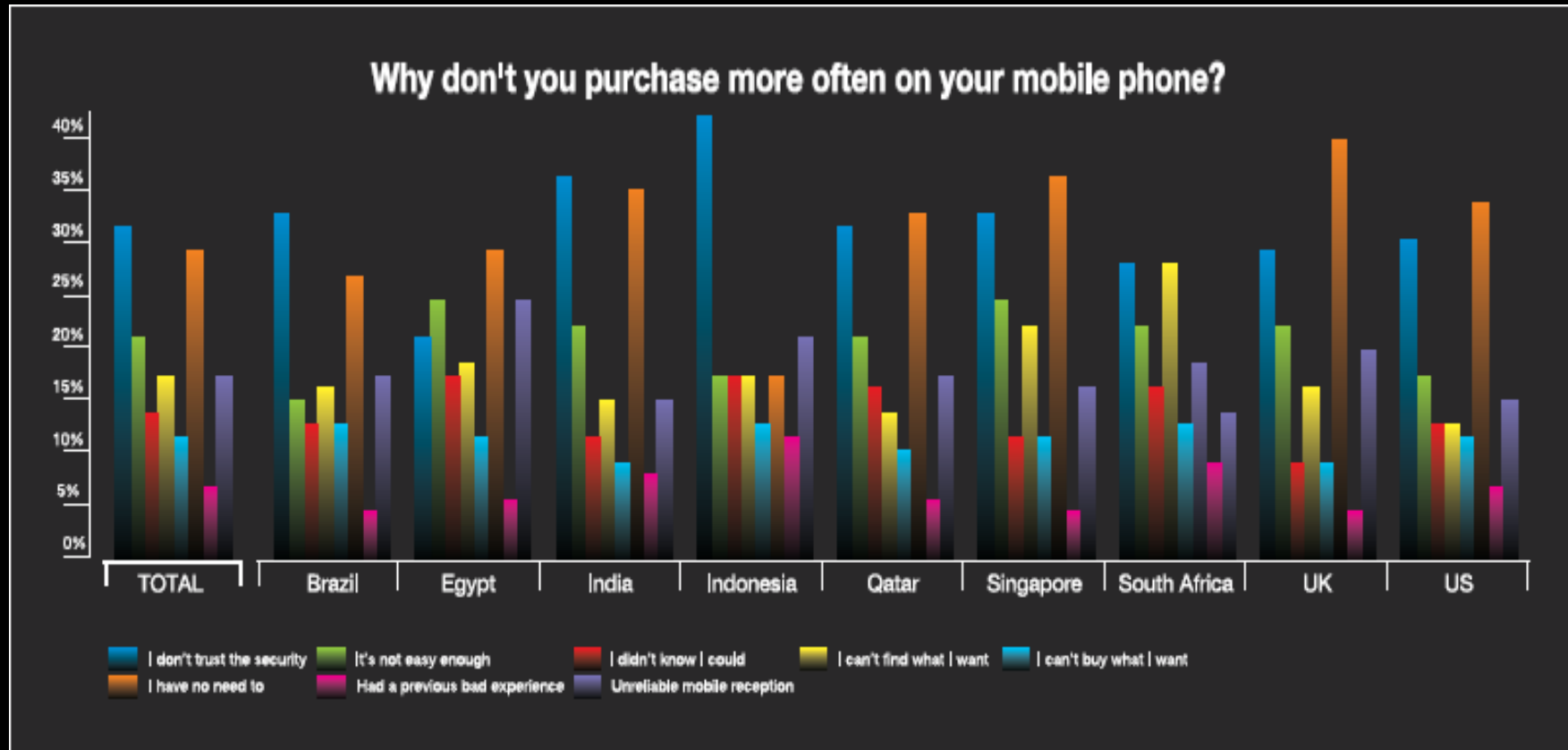
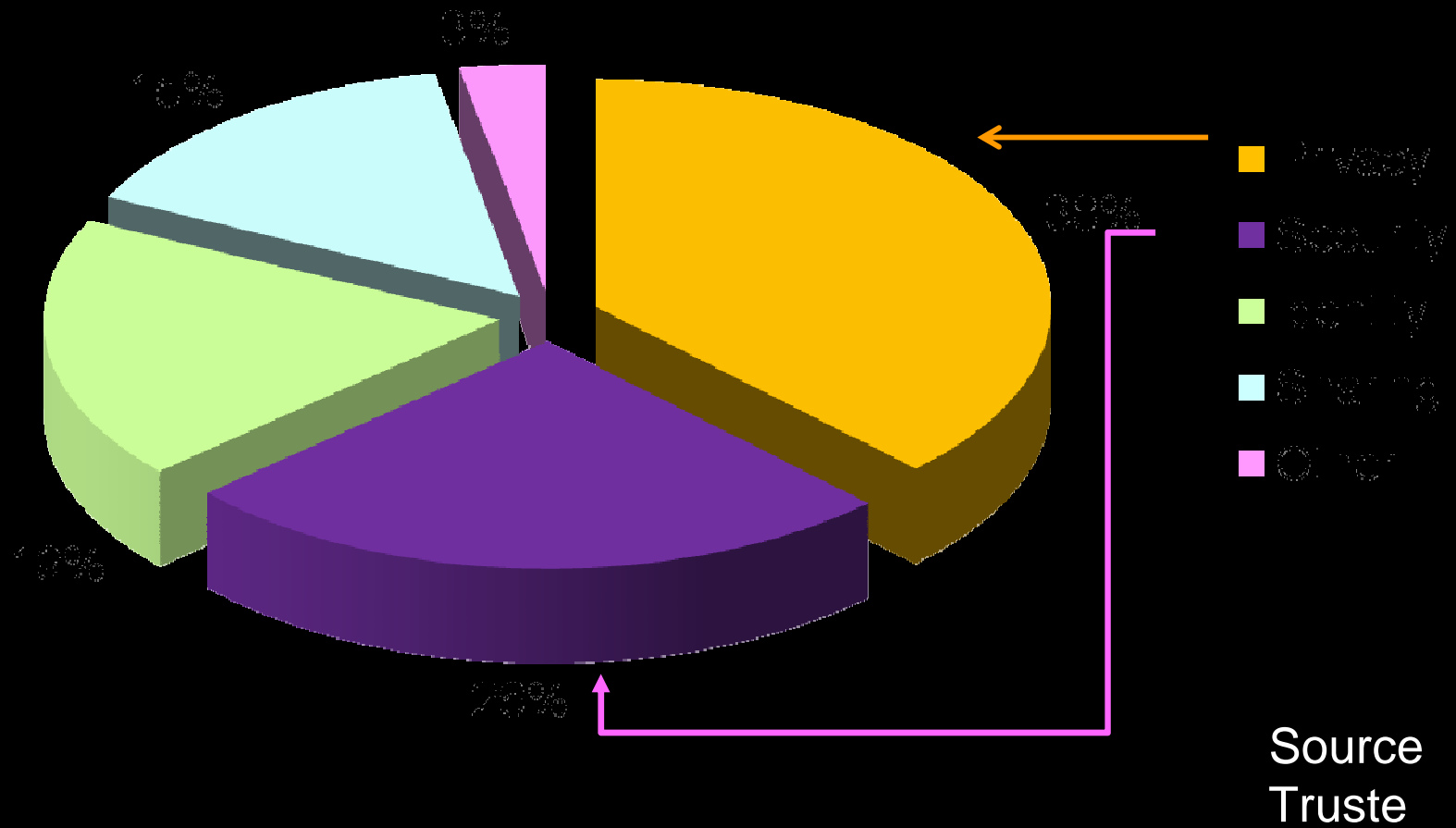


Figure 30
 Source: MEF Global Consumer Survey 2011
 Base=8,530 feature-and smartphone owners in 9 countries

Factors Affecting Consumer Trust

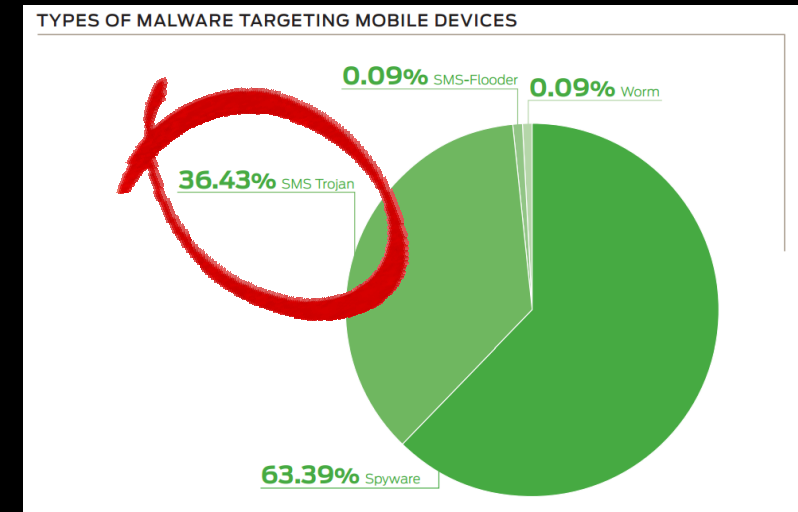
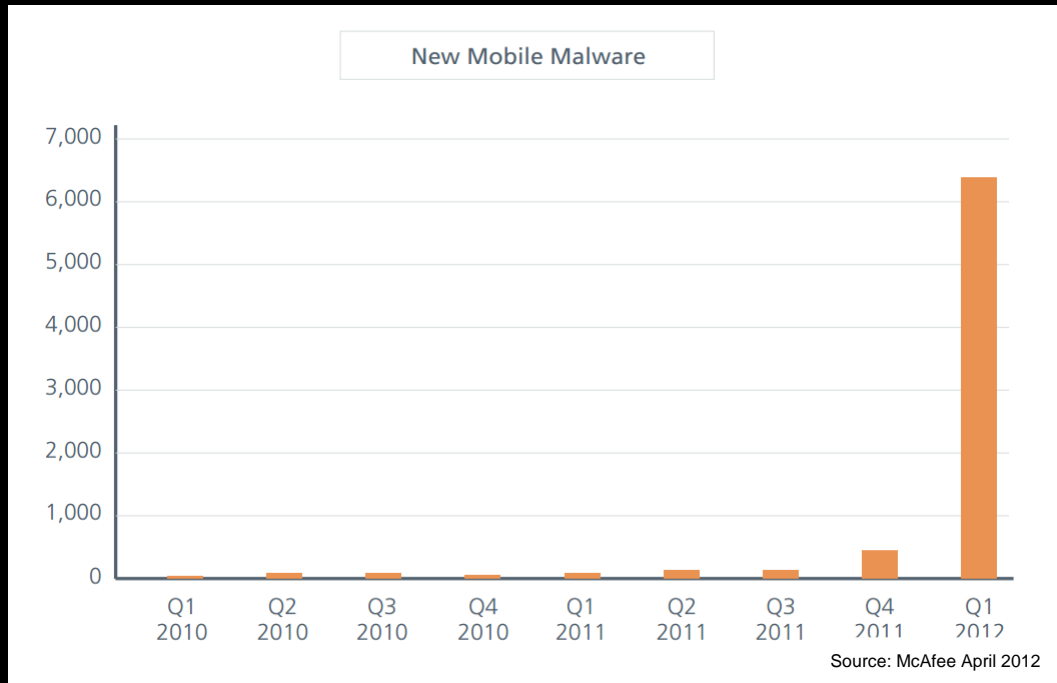


What do we need to do about Privacy?

- **Transparency and informed consent**
 - Honour the “Emotional Contract”
- **Establish best practices and standards**
 - Self Regulation
- **Provide practical tools and guidelines that support the value chain to ensure compliance**
 - MEF Initiative



The Threat of Malware



- Premium billing Android malware is an emerging threat to our industry
- Vigilance and responsibility across the whole eco-system is needed
- Collaboration with other security bodies (eg X9)

So....

- The international mobile content and commerce market is broad and growing
- Consumers everywhere are encouraged and worried by the same issues
- Privacy and security **MUST** be addressed to allow the market to grow fast
- We need to work together, internationally
- Note:
The 2011 MEF Global Consumer Survey is available for download at: www.mefmobile.org
free to members
£1,999 to non-members