



**TV 3.0 : INTEREST AND EXPECTATIONS
OF CONSUMERS
TOWARDS INTERACTIVE MOBILE TV**

Presented by Patrick VAN BLOEME, CEO Harris Interactive France

Context and objectives

- Personal Mobile Television – « Télévision Mobile Personnelle » or « TMP » in French –, which is part of the French governmental project "television of the future", has entered its active development in September 2007 with the choice of the DVB-H broadcasting standard being made.

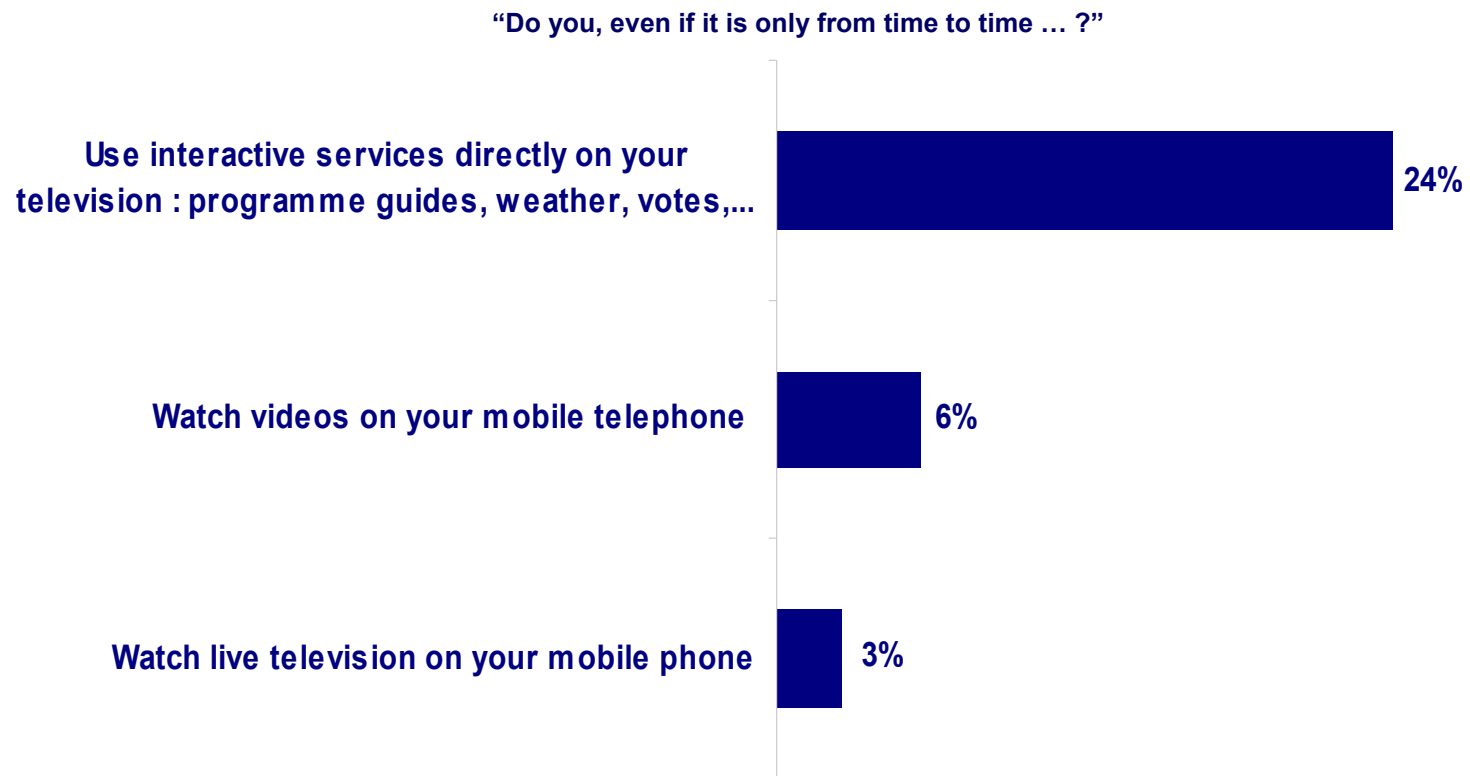
- Harris Interactive carried out a study with 1000 respondents to get insights into :
 - the interest and expectations of potential consumers towards personal mobile television,
 - their usages and expectations regarding interactive services applied to mobile television

Methodology and survey sample

- Quantitative study
- 1000 on line interviews conducted via emailing within the Harris Interactive French access panel
- Field period : From June 16th to June 19th, 2008
- The representative nature of the sample was guaranteed through quotas
 - So as to obtain a representative sample of the internaut population in terms of :
 - Gender
 - Age
 - Area of residence
 - Socio-professional category

Interactivity & Mobile TV – Current use

- **Almost one out of four internet users use interactive services on their television. On the other hand, very few use their mobile phone to watch videos or live television**

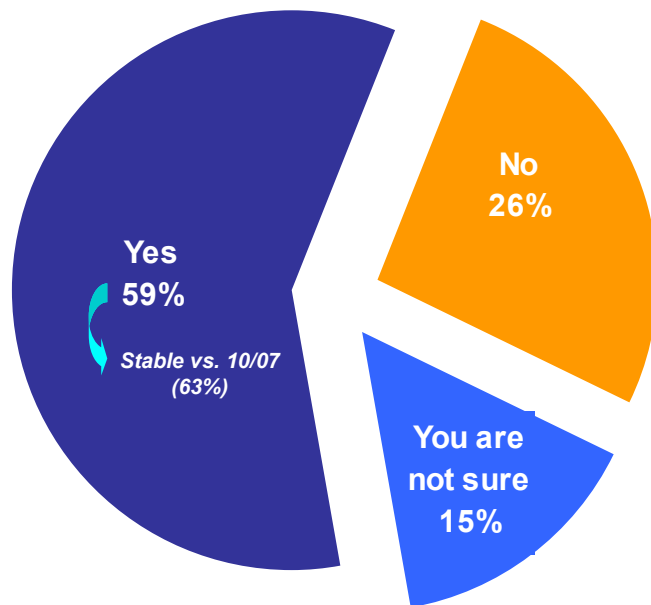


Basis : Total respondents (1000)

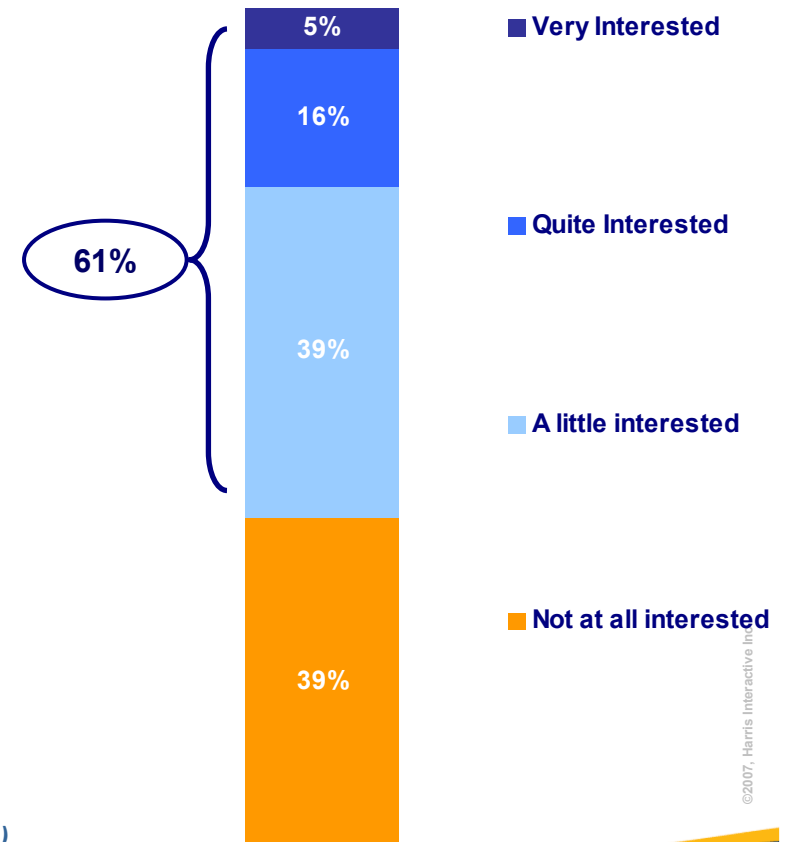
Personal Mobile TV – Awareness & Interest

➤ Rather high levels of awareness and interest, both close to 60%

“Have you ever seen, read or heard information concerning PMT?”



“Would you say that you are ... interested in PMT?”



Basis : Total respondents (1000)

Interested vs non-interested in Personal Mobile TV

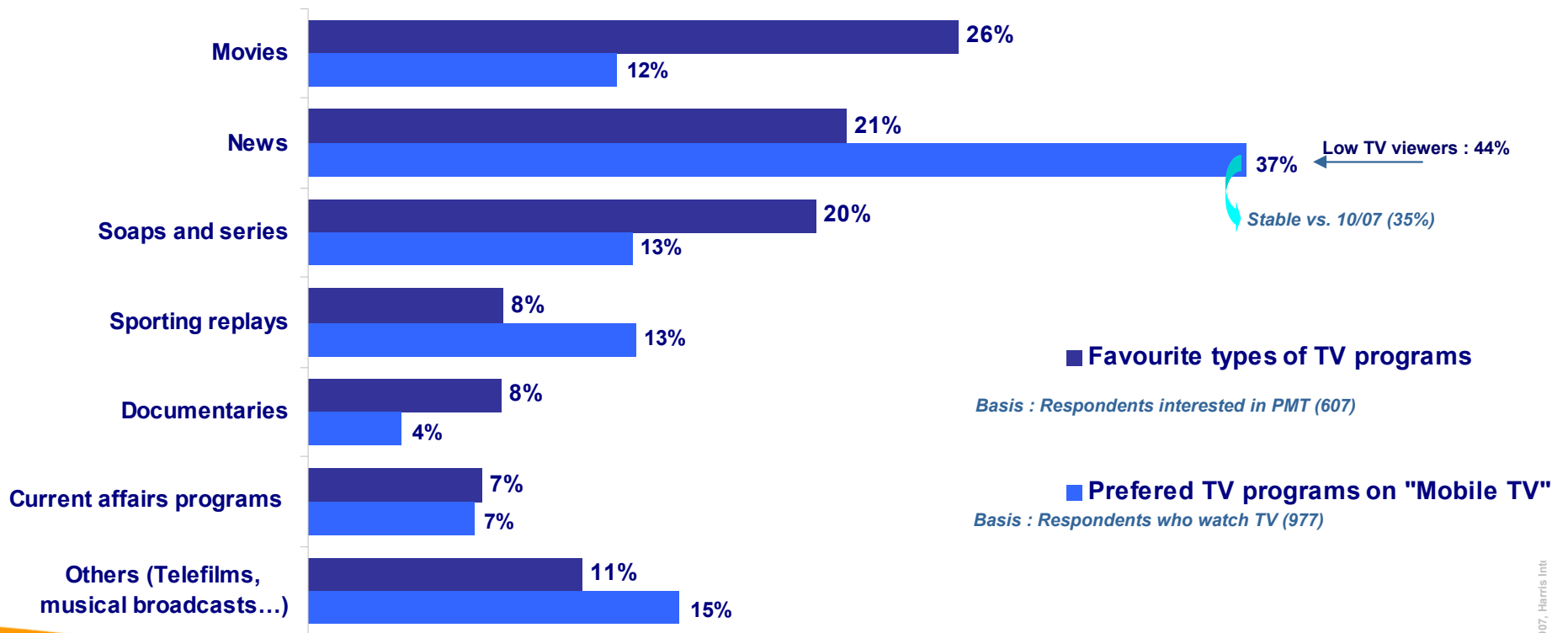
	Total	Interested in PMT	Non interested in PMT
Gender			
Male	50%	54%	49%
Female	50%	46%	51%
Age			
15-24 y.o.	23%	31% +++	21% ---
50 y.o. and over	23%	16% ---	25% +++
Equipments owned and used personally			
Mobile telephone with integrated camera	77%	87% +++	74% ---
Portable video player, with the possibility to watch films and look at photos	13%	23% +++	10% ---
Equipments and services used			
Use wi-fi at home	50%	60% +++	47% ---
Download or burn copies of music or films	37%	46% +++	35% ---
Use a 3G mobile telephone	17%	28% +++	14% ---
Technophiles			
Yes	7%	14% +++	5% ---
Subscription to a payable television offer			
Via ADSL with an internet connection a part from free channels (Free, Orange, Neuf, ...)	19%	26% +++	17% ---
Types of viewers			
Heavy TV viewers	12%	18% ++	11% --
Actual uses			
Watch live television on a computer screen	19%	31% +++	16% ---
Watch videos directly on you computer screen	49%	61% +++	45% ---
Use interactive services directly on your television : programme guides, weather, votes,...	24%	32% +++	22% ---
Subscription to an offer with television on mobile (3G service)			
Yes	20%	39% +++	11% ---
Prefer an access television on the move from...			
A laptop	23%	18% --	26% ++
A mobile phone	19%	24% ++	16% --
An multimedia device (MP3, video, TV, telephone, Internet, ...)	18%	24% +++	14% ---

TV programs – At home TV vs. mobile TV

➤ 37% would be particularly attracted by news programs on Mobile TV

“Personally, what are you three favourite types of television?”

“What are the three main types of programs that you would like to have access to thanks to “Mobile TV”?”

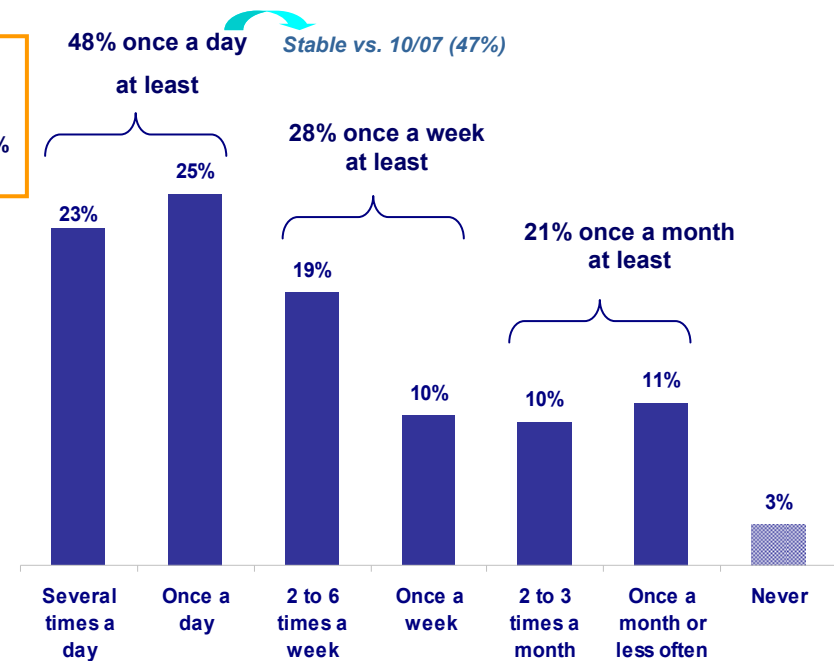
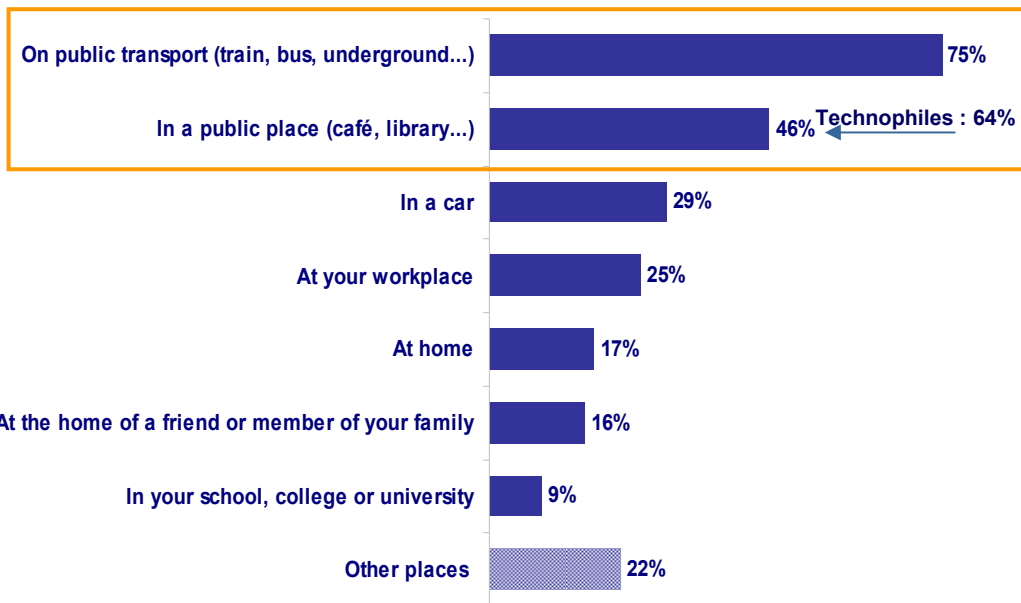


Personal Mobile TV – Usage circumstances

75% would watch PMT on public transport
and about half of the respondents would watch it at least once a day

“In your opinion, where could you be when you watch PMT on your mobile phone or portable video player?”

“In your opinion, how often would you watch PMT supposing that you could access it from your mobile phone or from another source such as a portable video player?”

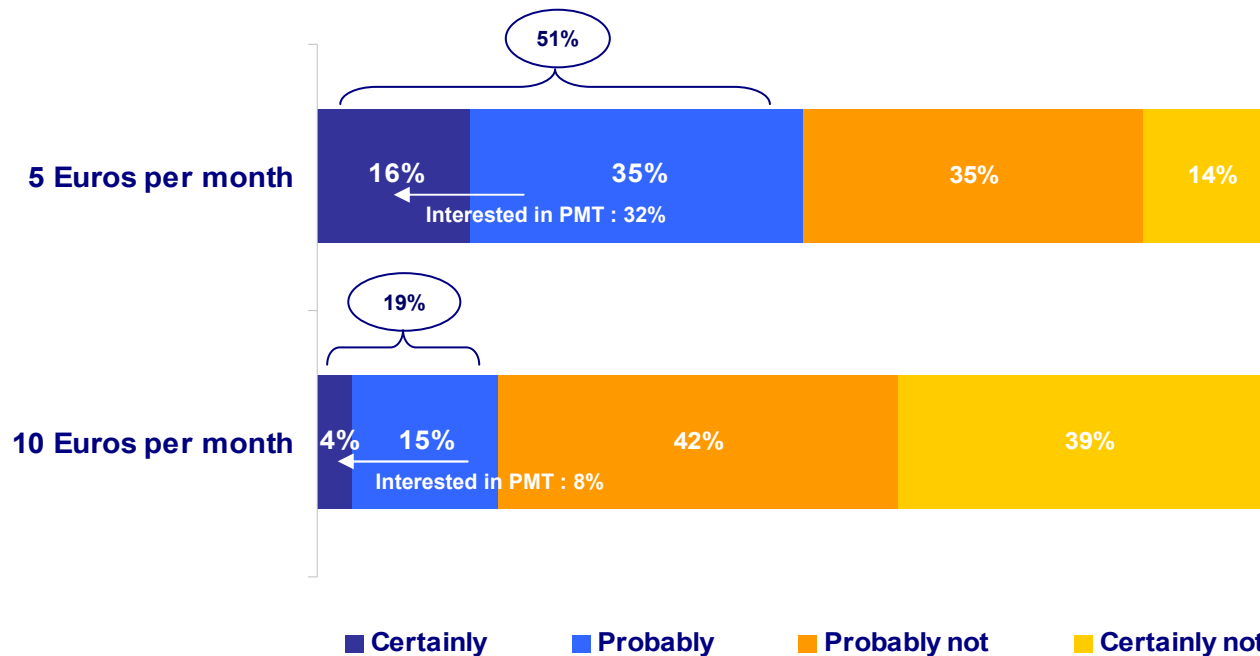


Basis : Respondents interested in PMT (607)

Personal Mobile TV – Pricing acceptance

➤ More than 50% of internet users would subscribe to PMT at a monthly fee of 5 €

“To what extent would you subscribe to pay for PMT on your mobile phone or portable video player?”

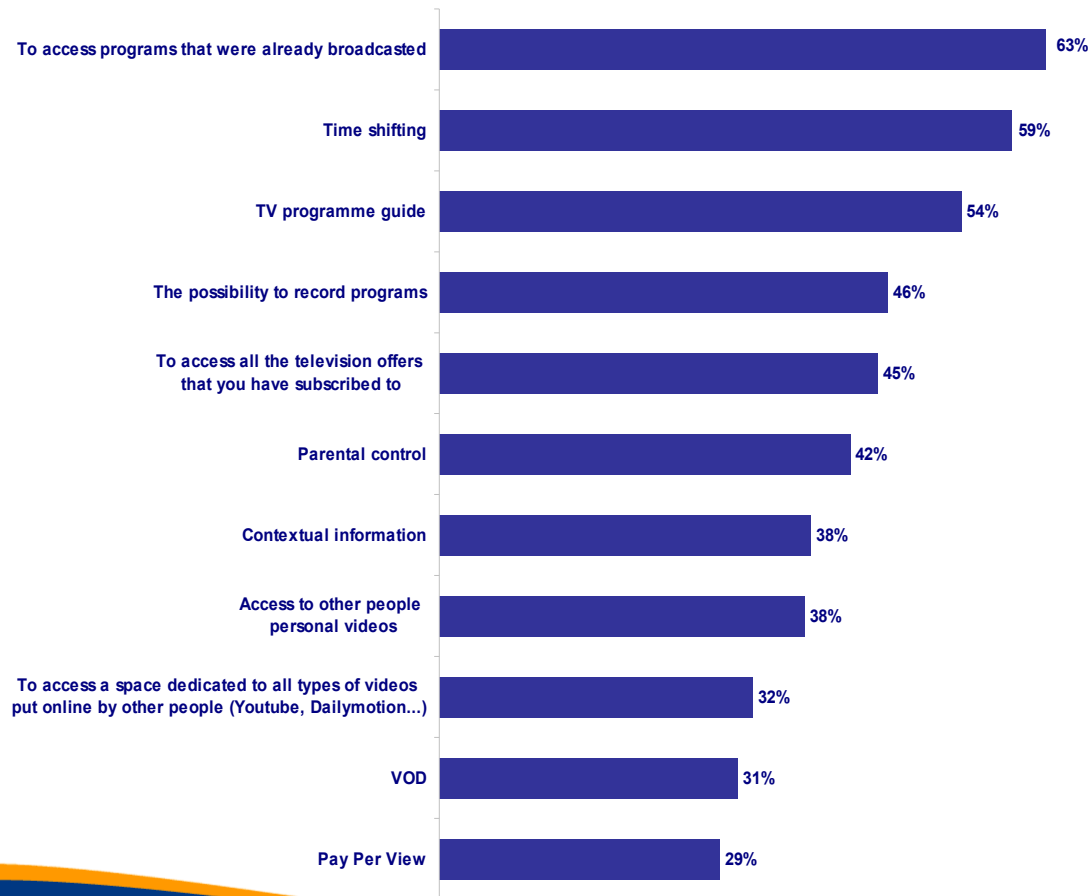


Basis : Respondents interested in PMT (607)

Interactive functionalities – Interest & Pricing preference

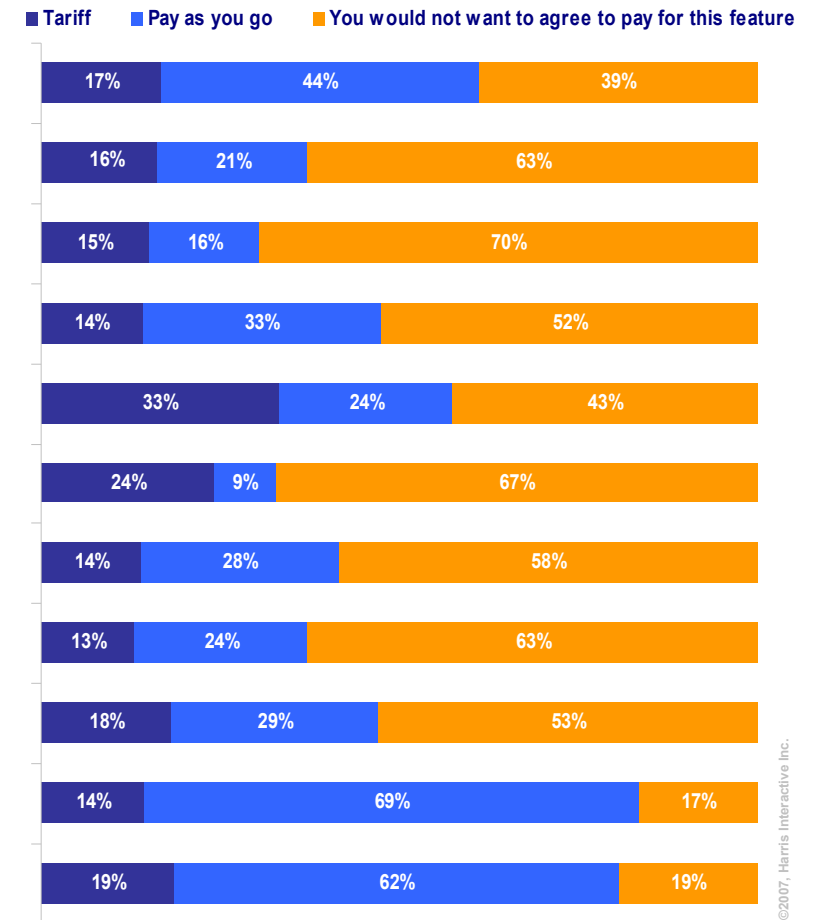
➔ **Access programs that have already been broadcasted and time shifting are the most interesting interactive services on mobile TV**

“Thinking of Mobile TV, to what extent are you interested in the following features?” (ST. 6-10 / 10)



Basis : Respondents interested in PMT (607)

“Would prefer to pay for with via a tariff or pay as you go, depending upon your needs?”



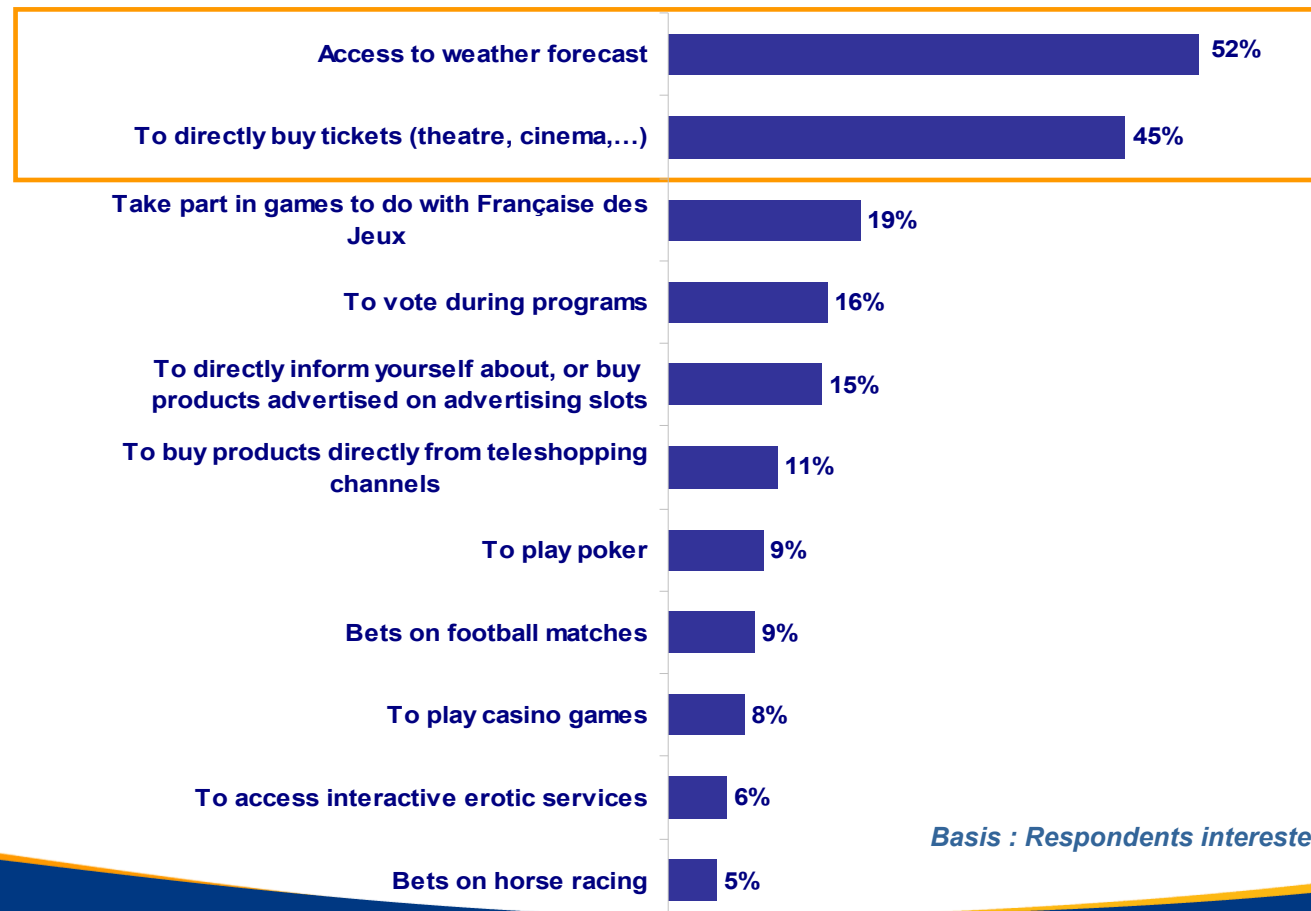
Basis : People interested & mark > 6

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Interactive services – Interest level

➔ **More than half are interested in weather forecasting services and 45% in buying tickets directly**

“Still thinking of Mobile TV, to what extent are you interested in each of the following interactive services?” (6-10)

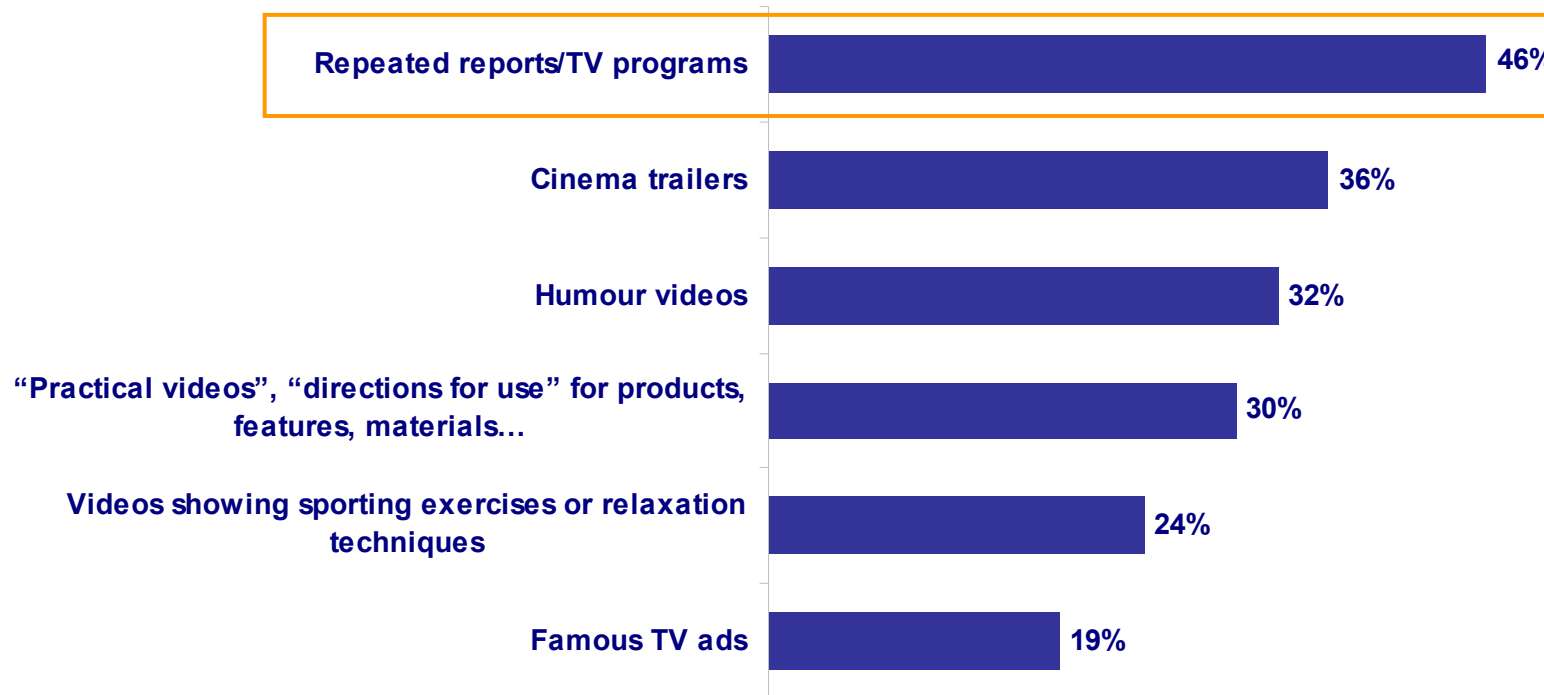


Basis : Respondents interested in PMT (607)

Videos – Interest level

➔ **Nearly half of respondents interested in PMT are also interested in repeated reports/TV programs via Mobile TV**

“Still thinking of Mobile TV, to what extent are you interested by each of the following types of videos?” (6-10)

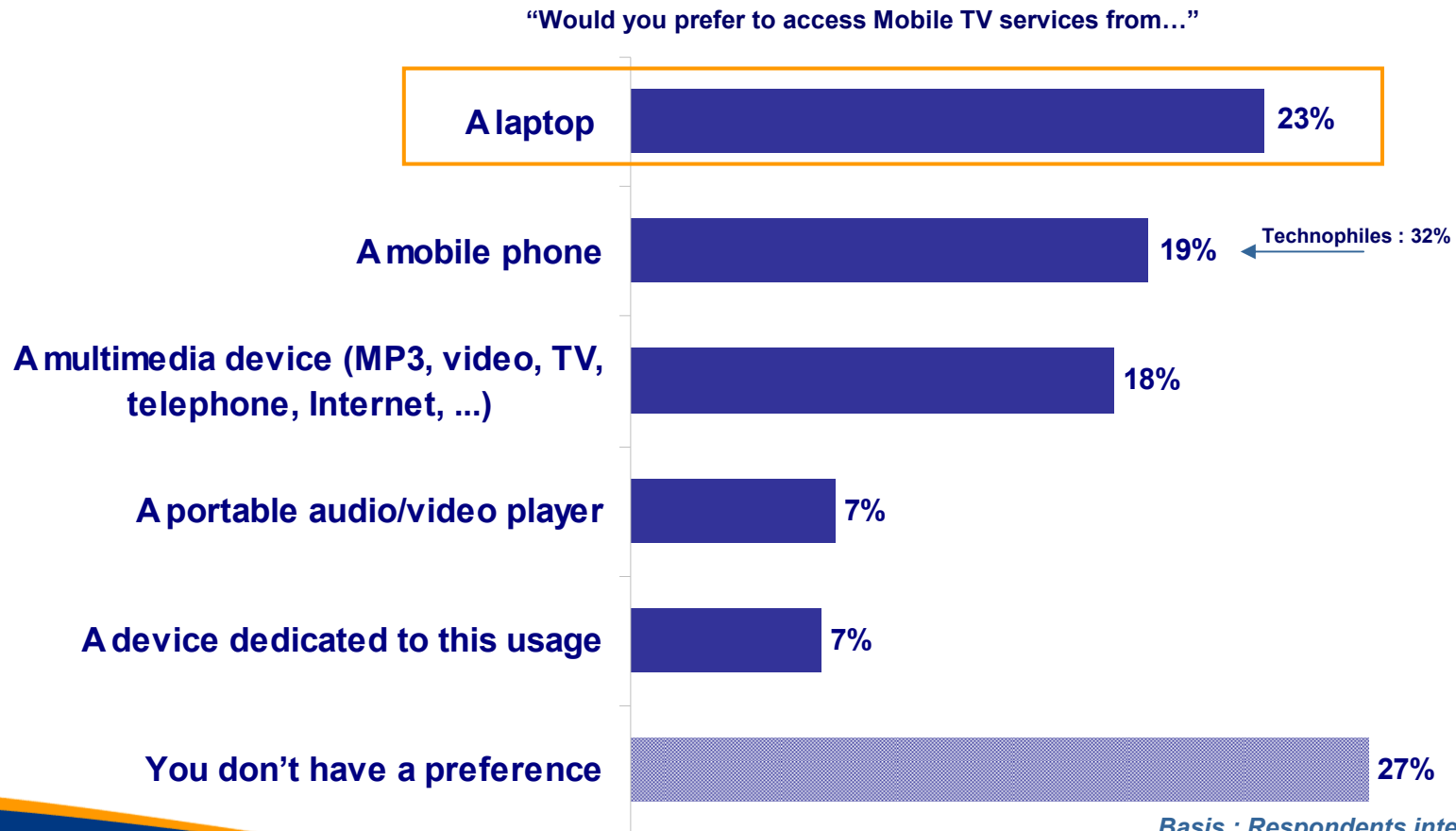


Basis : Respondents interested in PMT (607)

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Mobile TV – Which device ?

➔ **23% would prefer to access Mobile TV from a laptop, while 19% would prefer their mobile phone**



Summary

- Overall, a rather high awareness of the future Mobile TV in France, since 59% have already heard about this service.
- The interest in Mobile TV is also rather high. Only 5% are very interested, the others probably need to experience the service to be convinced.
- News programs are the most attractive ones on Mobile TV, and they would mainly watched on public transports or in public places such as a café or a library.
- 51% would accept to pay 5 Euros per month to be able to use this service. Although the pricing strategies of the operators have not been fully set up so far, this figure gives a positive feedback from the consumers on a payable Mobile TV service.
- As for interactive services and contents, the respondents shown a preference for :
 - the possibility to watch programs that were already broadcasted
 - a time shifting function
 - the access to weather forecasts
 - the possibility to buy tickets (theatre, movies, ...)
- Laptops and mobile phones would be the preferred devices to watch Mobile TV.





Thank you !

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Appendices

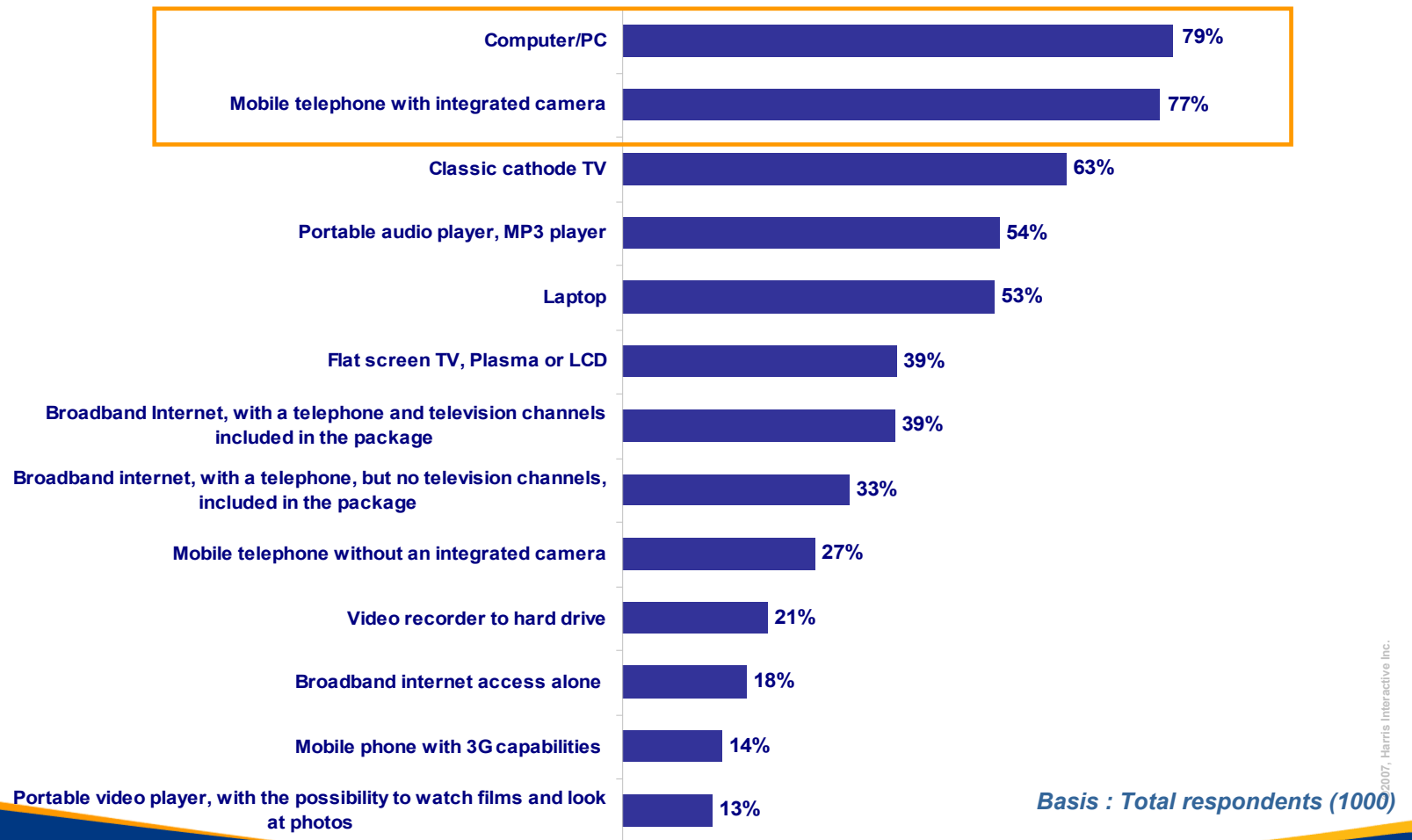
Sociodemographic profile

Gender	
Male	50%
Female	50%
Age	
15-24 years old	23%
25- 34 years old	22%
35-49 years old	32%
50 years old and over	23%
Area of residence	
Paris area	22%
Province	78%
Socio-professional category	
CSP +	37%
CSP -	30%
Non-working	33%

Basis : Total respondents (1000)

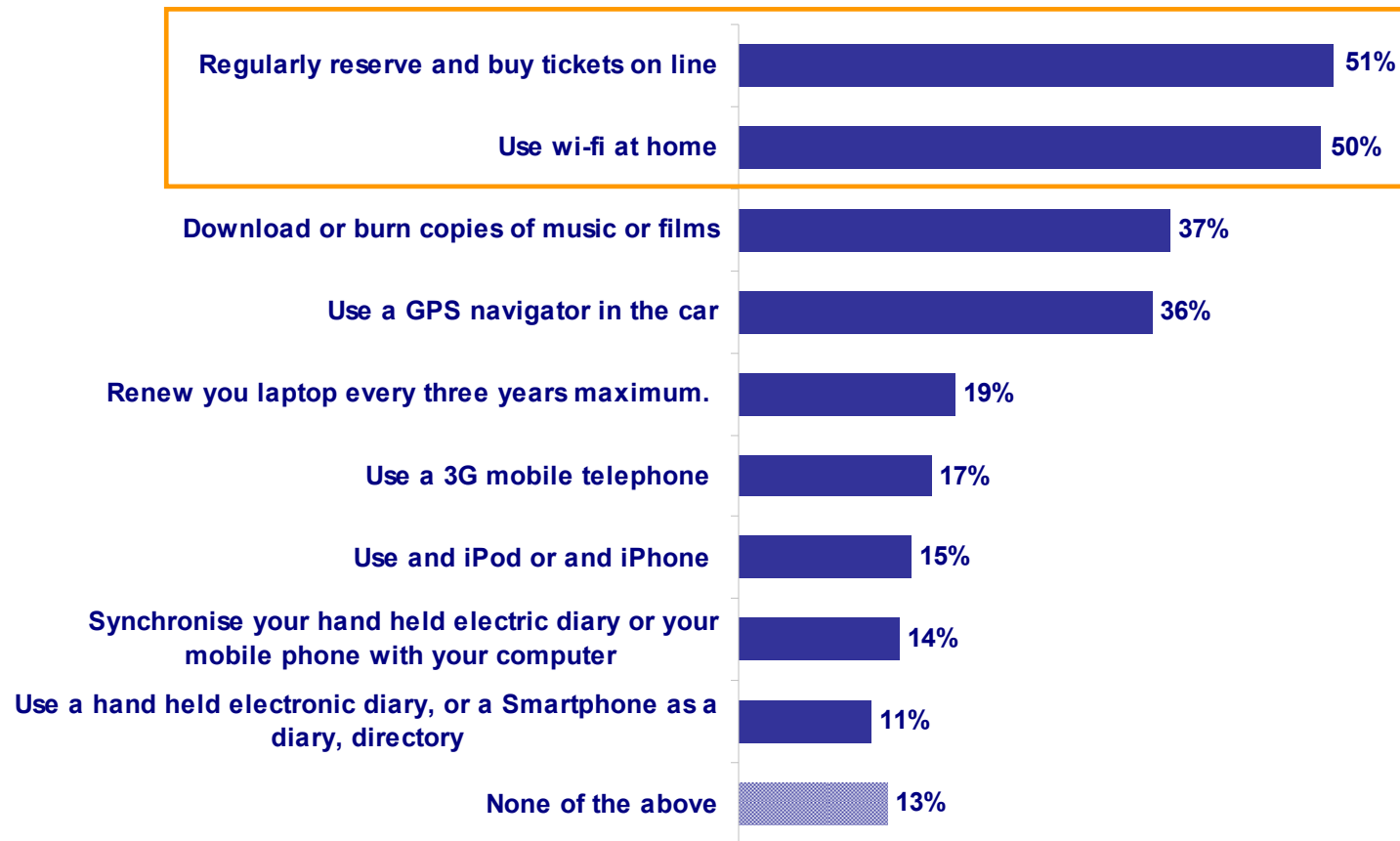
Types of Equipment owned and used

“What are the equipments that are owned in your household and which ones do you use personally?”



Equipments and services used

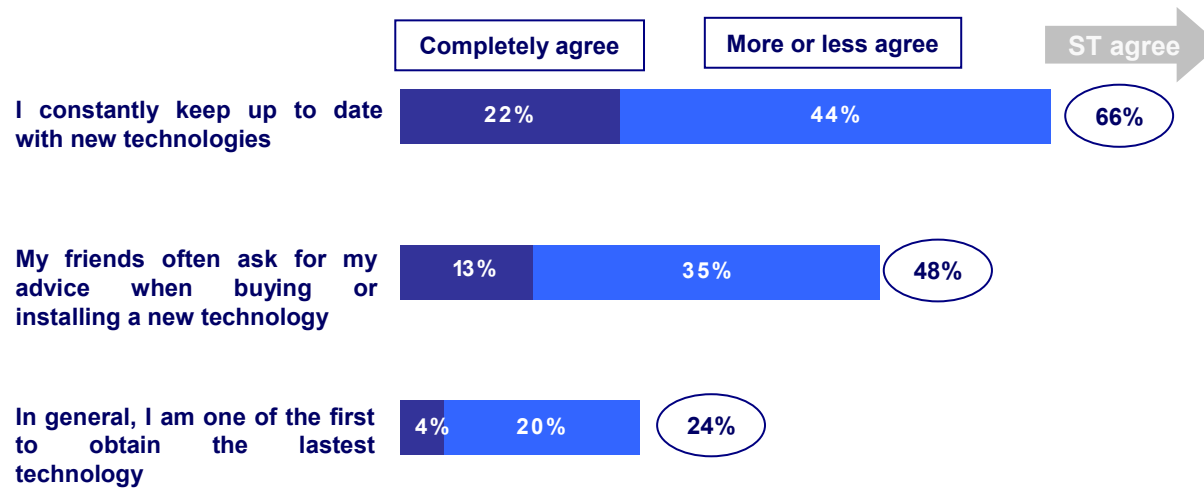
“Among the following equipments and services, indicate the ones you use or do?”



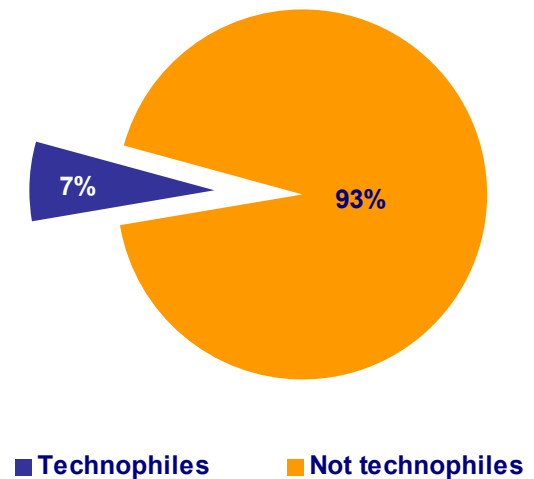
Basis : Total respondents (1000)

Technophilia

“Do you completely agree, more or less agree, more or less disagree or completely disagree with the following statements?”



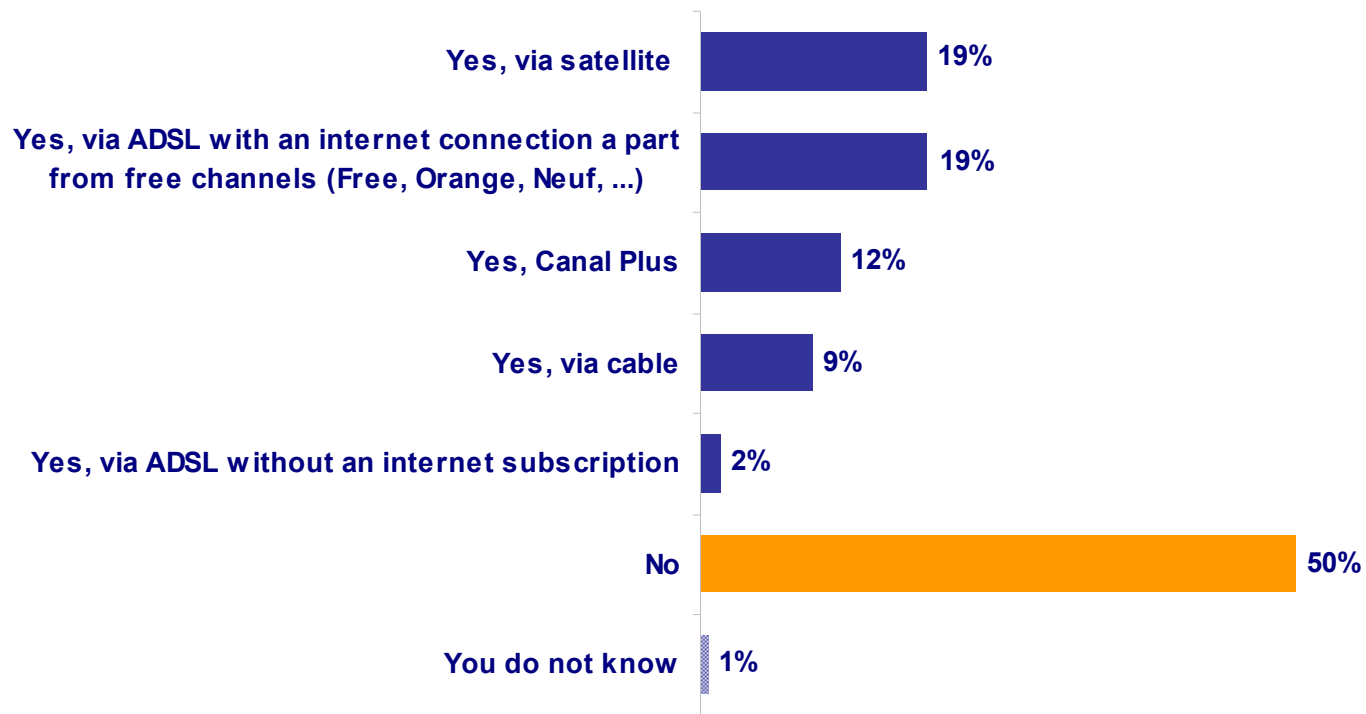
Profile of technophilia



Basis : Total respondents (1000)

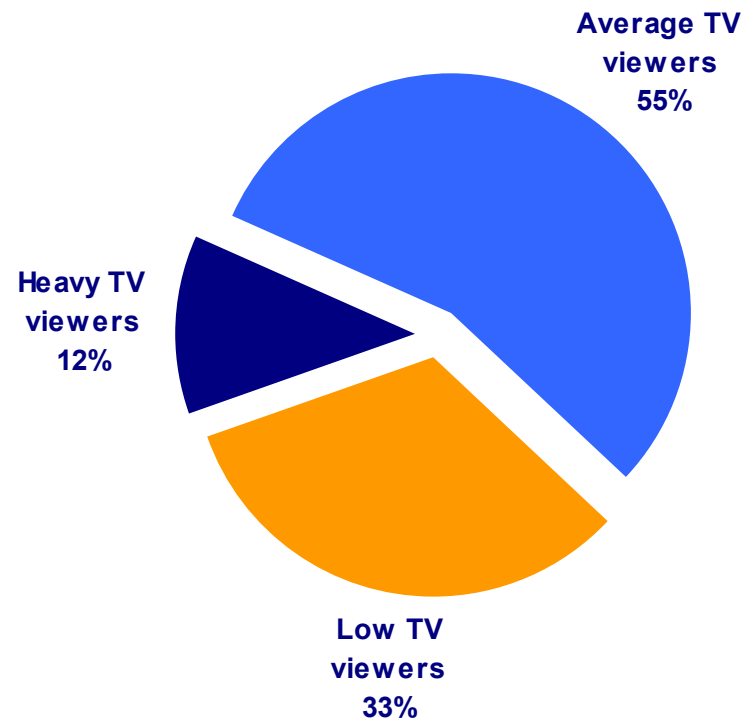
Subscription to a payable television offer

“Has your household subscribed to a payable television offer?”



Basis : Total respondents (1000)

TV viewers segmentation

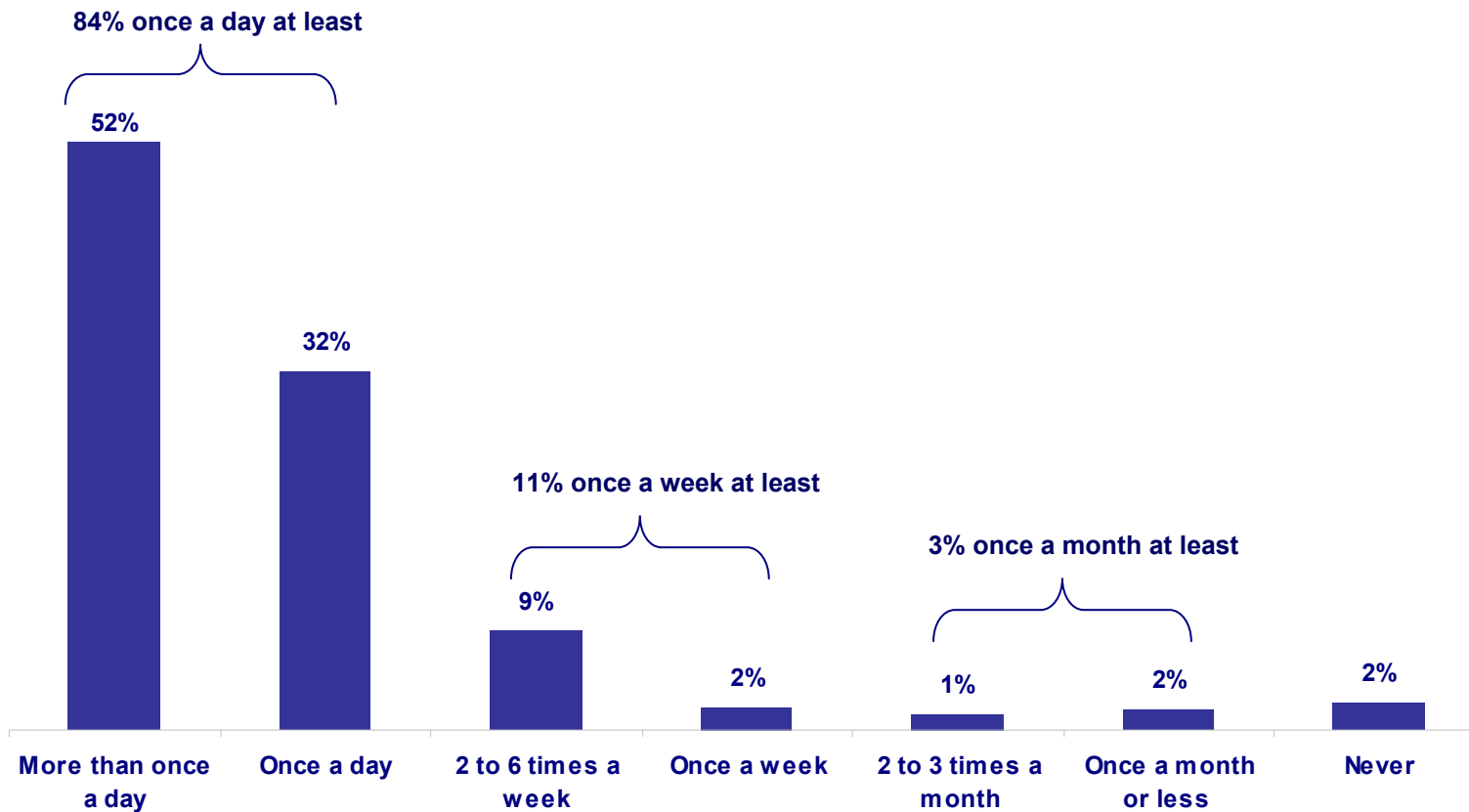


Basis : Total respondents (1000)

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TV watching frequency

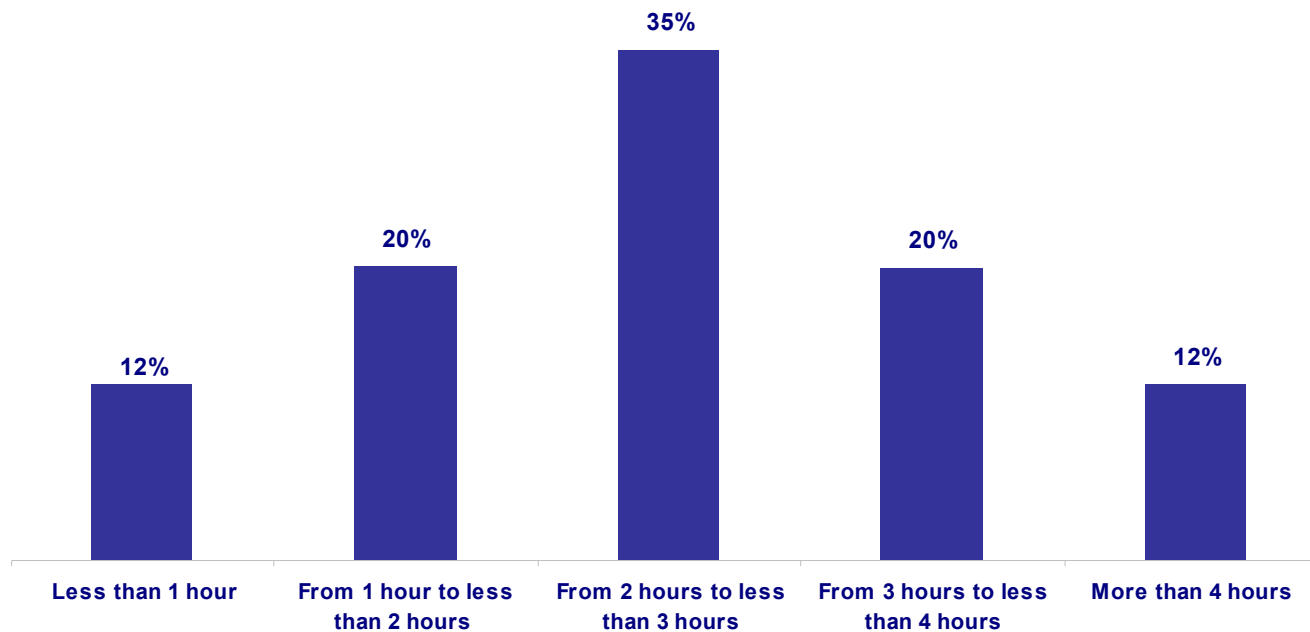
“Personally, how often do you watch TV?”



Basis : Total respondents (1000)

Time spent watching television

“On average, how much time do you spend watching TV each day?”



Basis : Respondents who watch TV (977)