

Mobile TV - Market Potential Omnibus Surveys Presentation of results



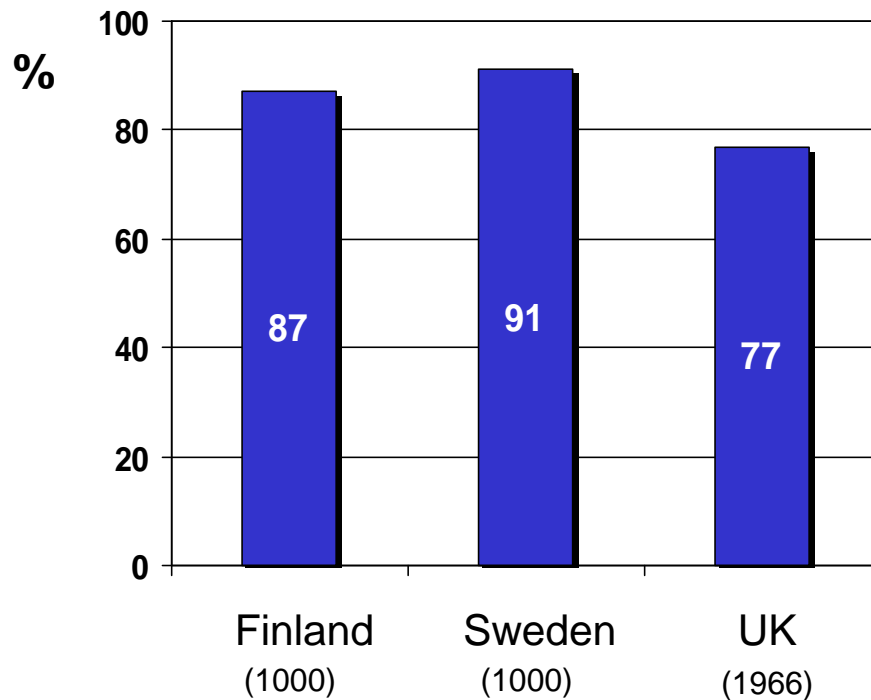


Design & Methodology

- Omnibus Consumer Surveys
 - 1000+ Adults
 - Questions asked of all mobile phone owners
 - Three markets
 - Finland
 - Sweden
 - UK
 - August/September 2003
- Omnibus Consumer surveys are usually showing rather pessimistic results!



High mobile ownership represents high potential in each market



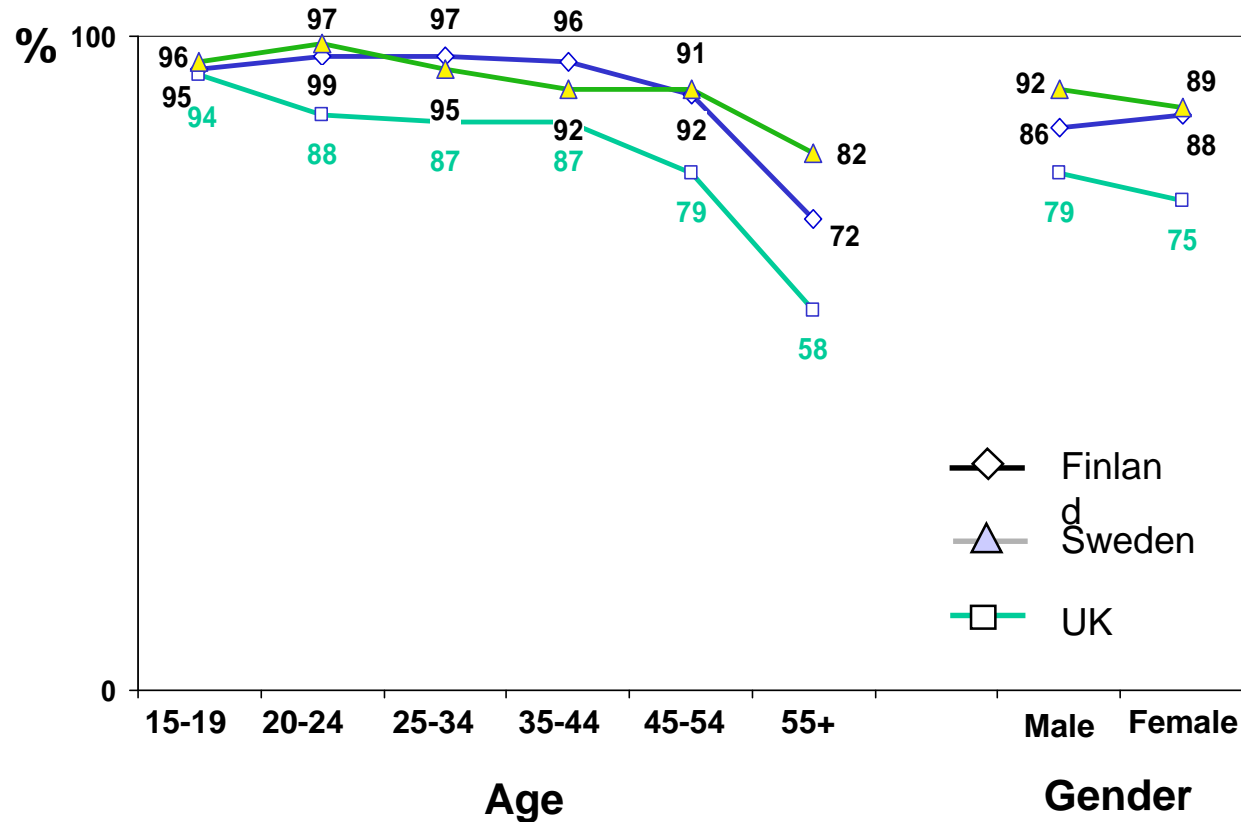
- Majority of adults do own a mobile phone
 - In each market
- However, ownership levels decline markedly with age

Base: Total Adult sample - each Market



Mobile ownership is very high across age groups

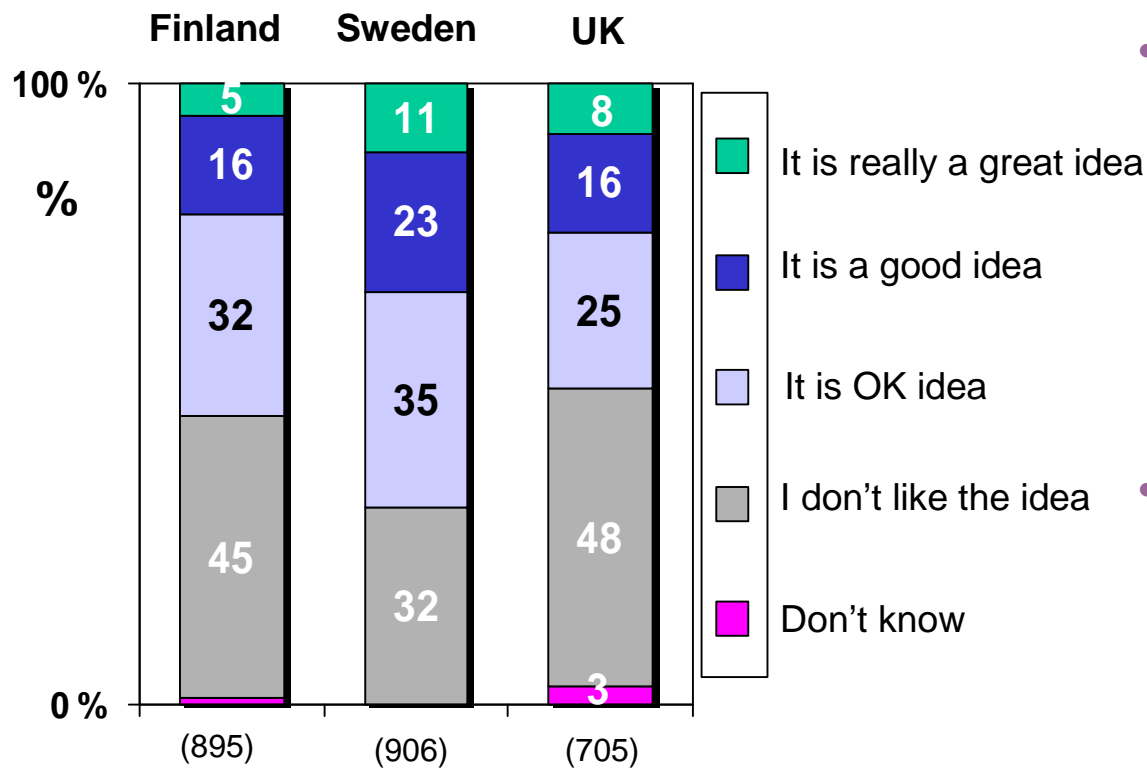
- Mobile ownership sustains up to mid 50's in Finland & Sweden
- Although tailing off earlier in UK



Base: Total Adult sample - each Market



34% of the mobile owners in Sweden endorse the idea of Mobile TV

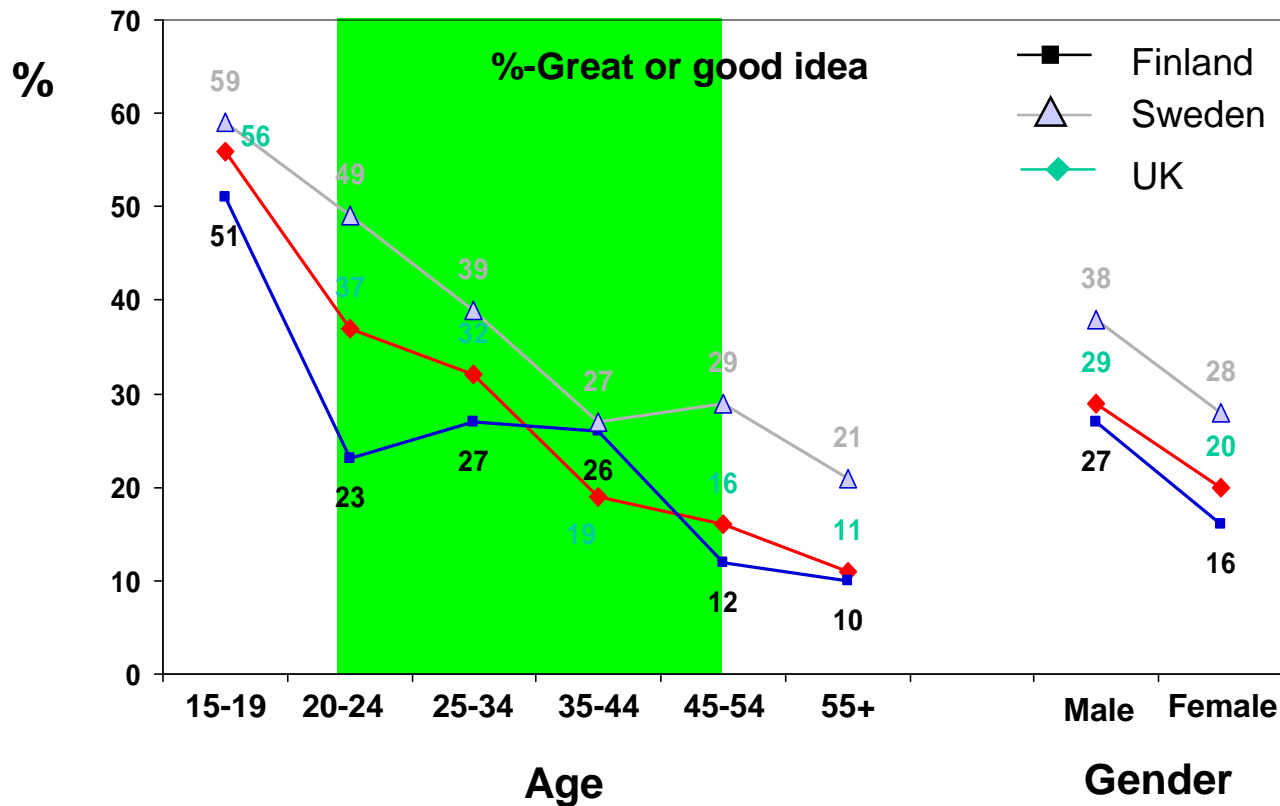


- Over 20% endorse the idea of Mobile TV
 - Consistent for Finland & UK
 - As high as 34% in Sweden
- However, this naturally varies by demographics.....

Base: All with mobile phone



Younger, Male mobile owners are far more willing to endorse Mobile TV



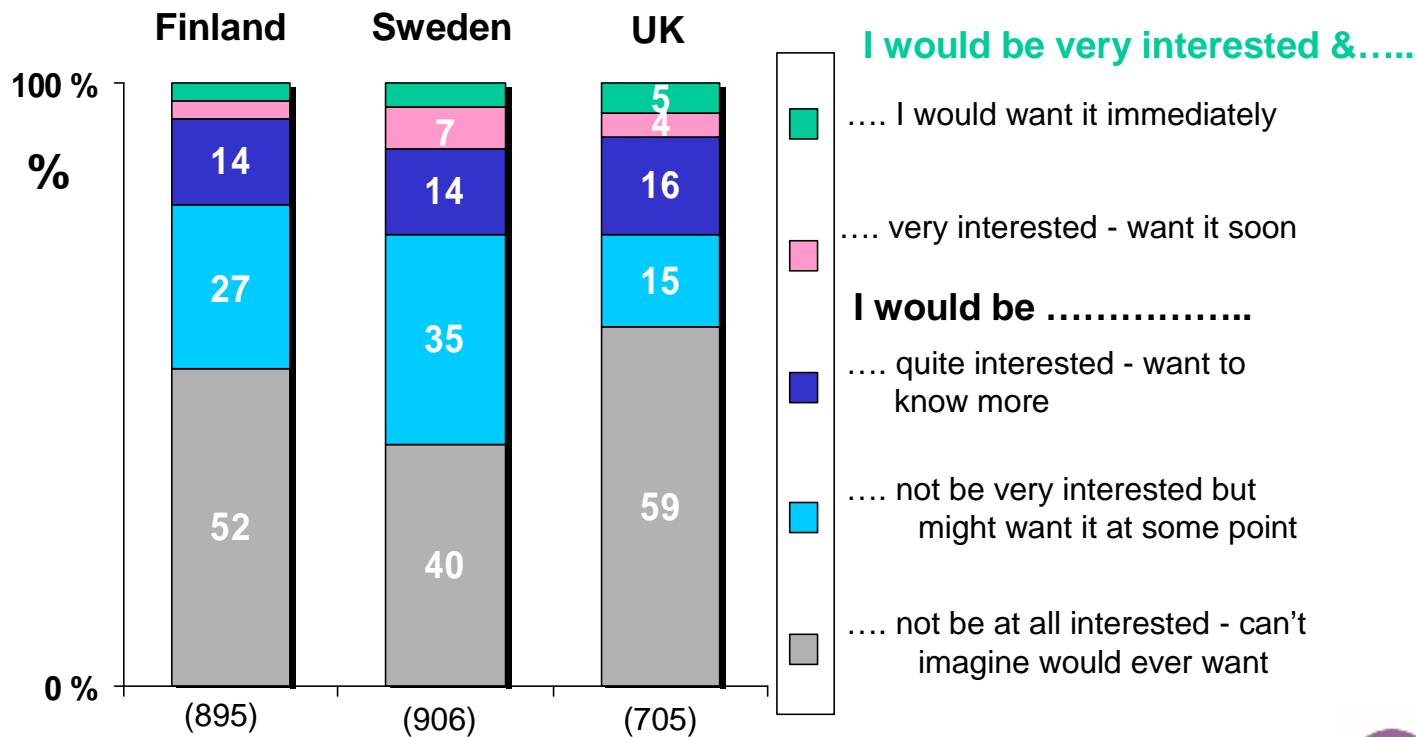
- Teenagers are the most receptive audience for Mobile TV
 - Over 50% endorse idea
- Beyond this, high points vary by market:
 - Over 30% 20-34's in UK
 - Over 1/4 for 25-44 in Finland
 - Sweden above 40% up to mid 30's

Base: All saying it is Good/Great Idea



Up to 1/4 express some personal interest in Mobile TV

- There is minority immediate interest in getting Mobile TV
 - 6 to 11% would want now/soon
- But many more would like to investigate
- And 40%+ would not rule out

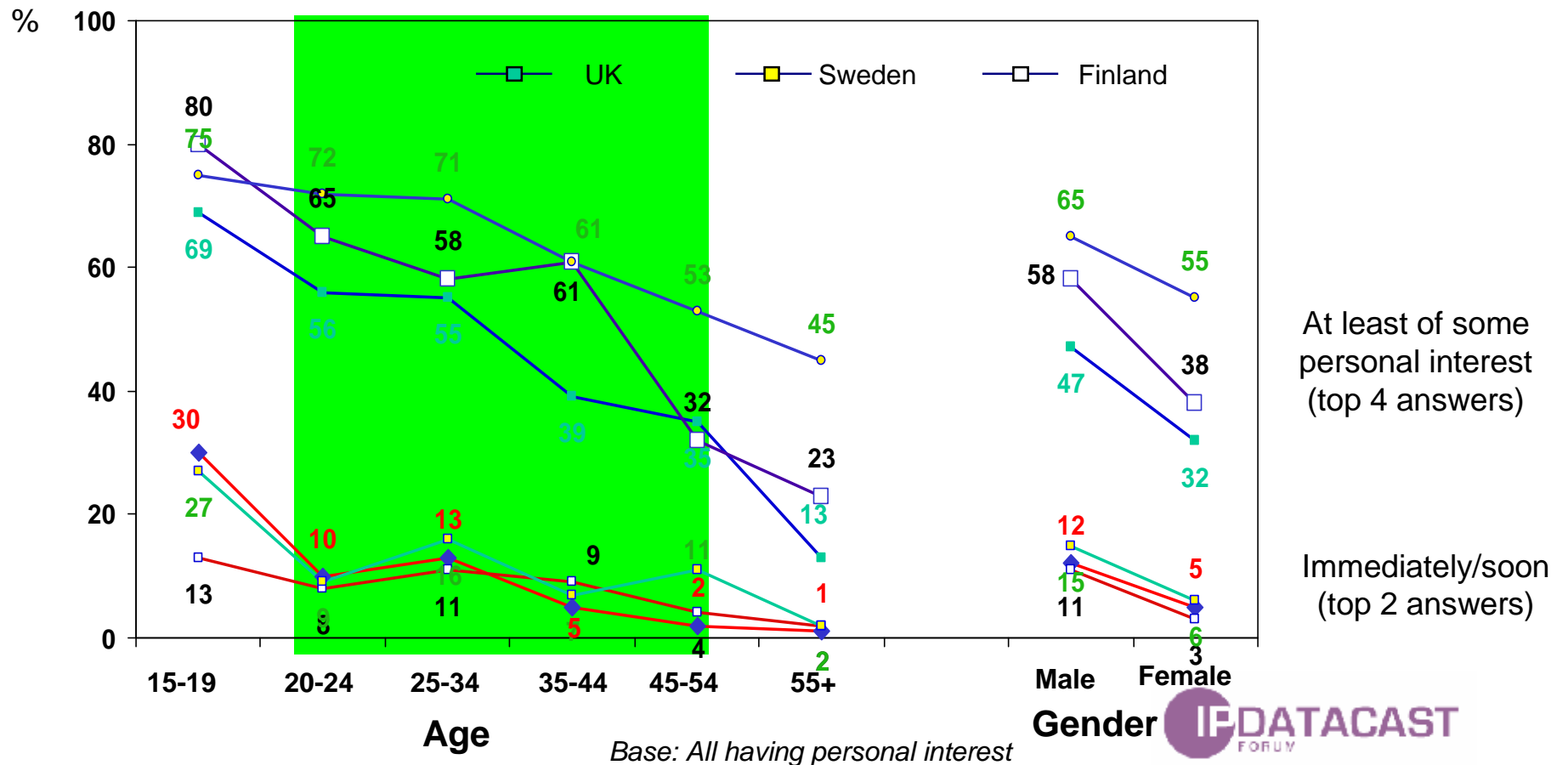


Base: All with mobile phone



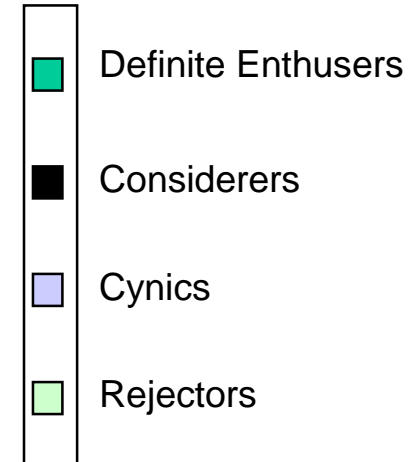
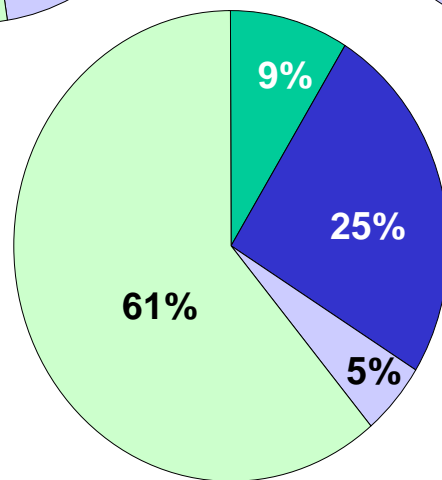
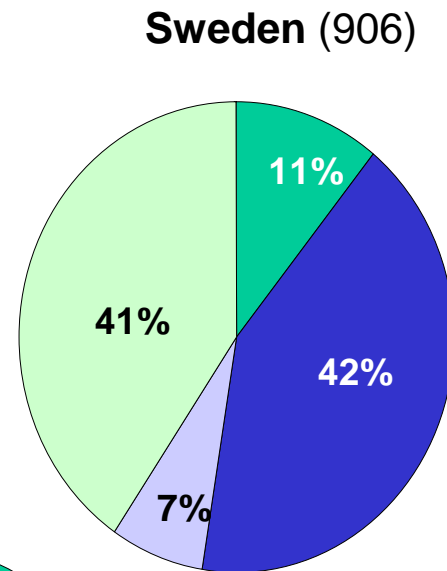
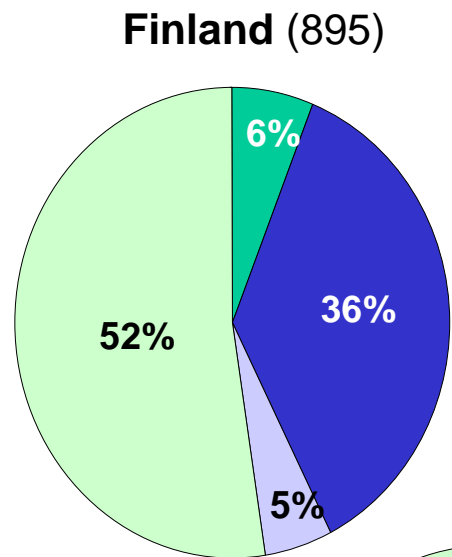
Omnibus Findings - Personal Interest By Age & Gender

- Immediate interest sustains at 10-15% up to 30 something, then tails off
- However, *openness to the idea in future* is 60%+ in Finland up to age 44





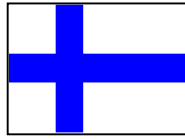
The Potential Market



Base: All with mobile phone

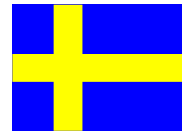


Preference for channels differs by country



Finland

General News
Regional news
Information/advice
(text TV)
Documentary
channels
General
knowledge



Sweden

General News
Regional news
Information/advice
(text TV)
Newspaper
coverage
Events update
(buy)



UK

General News
Music channels
Sports news &
highlights
Sports coverage
Regional news

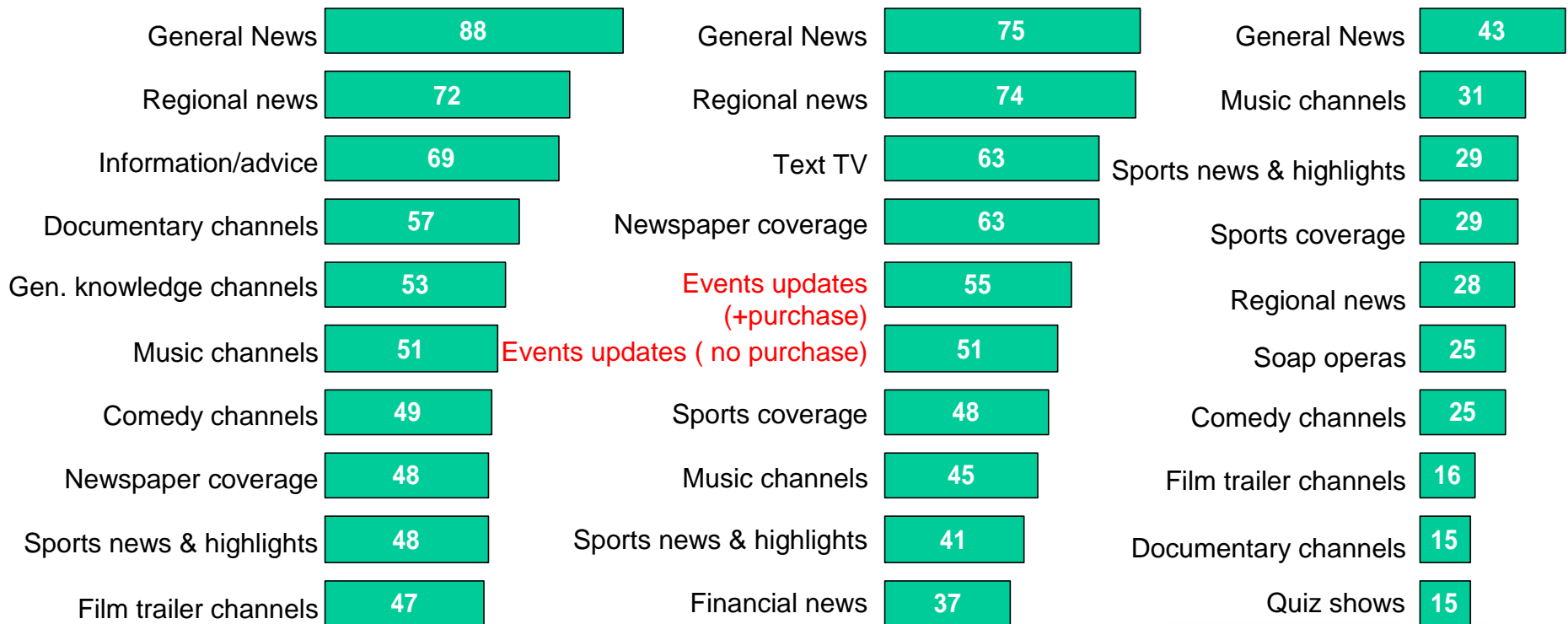
More serious, factual & information seeking

More entertainment focus



UK is more oriented to entertainment

- General news is uppermost for all markets, but beyond this,
 - Very different profiles emerge



Base: All with some level of interest in the mobile TV