



Post PC Era: The Mobile Only Internet Generation & China

March 2012

Mobile Only Internet Generation & China

The mobile revolution is truly here; by the end of 2012 the number of mobile-connected devices will exceed the number of people on earth. The revolution brings with it a new generation of mobile only internet users, who only access the internet through web enabled mobile devices.

This is especially true in developing markets where computers and laptops are not easily accessible. For these markets the mobile device is much more than just a phone, it connects the previously unconnected on a mass scale both in cities and in rural areas. Mobile gives them access to the world's information and provides businesses with previously untapped consumers. A key market is China, where our research has found the growth of the mobile only internet generation has increased 8 percentage points (ppts) in a year.

This report looks at the mobile only by country, with an in-depth look at China. It also looks at the reasons why people are mobile only and the differences by cities and rural areas - we found those in rural areas in China are 16ppt more likely to be mobile only, compared to those in a city. All the research data was captured by surveys undertaken directly on the mobile internet.

For more information on this report please contact:

info@ondeviceresearch.com



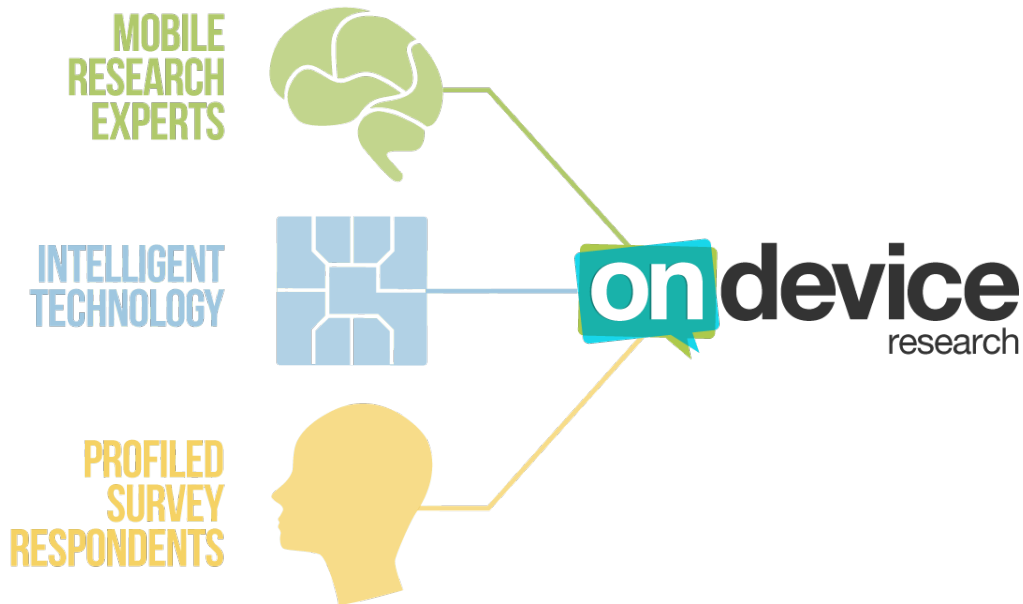
**On Device Research
uses the mobile internet
to gain access to
consumer opinions at
any time, place or
country**

We've surveyed one million consumers across 53 countries

If you have any of your own questions you'd like to ask, send them through to us at:

info@ondeviceresearch.com

How we work



Expertise in mobile research projects

There are numerous variables to consider in mobile research, including devices, survey design, locations, time of day, samples and cultural differences. We have surveyed more than a million people in over 50 countries.

Intelligent survey technology

That works across any web enabled device – feature phones, smartphones, tablets and computers.

Profiled survey respondents

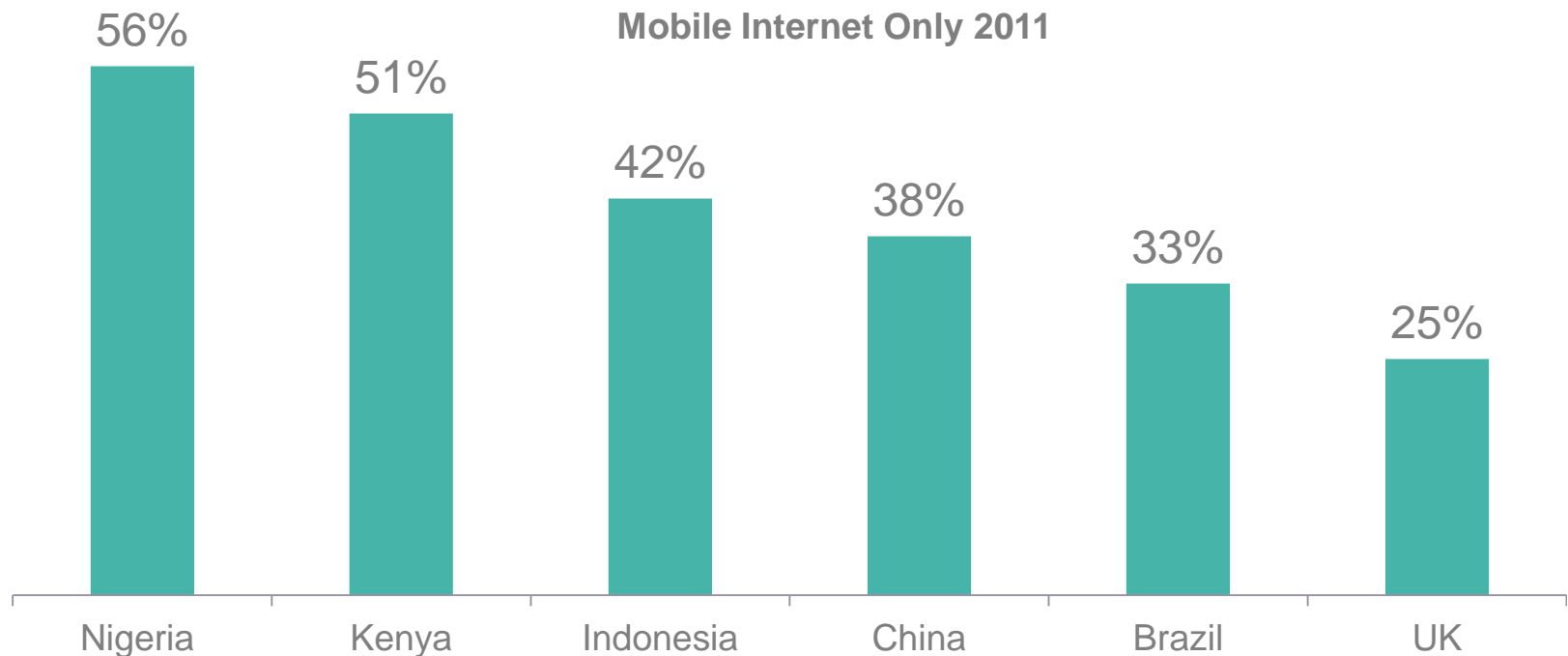
Recruited through our network of mobile publishers, available in any country and prepared to take part in studies anytime, anywhere.

Summary

- A significant percentage of key developing markets are 'mobile only', and it's the feature phone that dominates these markets.
- The growth of people only using their mobiles to access the internet in China, has increased 8ppts in a year and the key reason for this, is they don't have access to a computer.
- The rural population in China is more likely to be 'mobile only', as they are even less likely than those in the cities to have a computer.
- Chinese mobile web users are keen internet browsers, with over a quarter spending an hour browsing every day, giving companies the means to communicate with key target audiences.
- Over a quarter of mobile webs users in China are currently using mobile banking, and this is even higher amongst smartphone users. With growth likely to increase, it presents a huge opportunity for the banking industry

38% of mobile internet users in China, only access the internet through their mobile phone

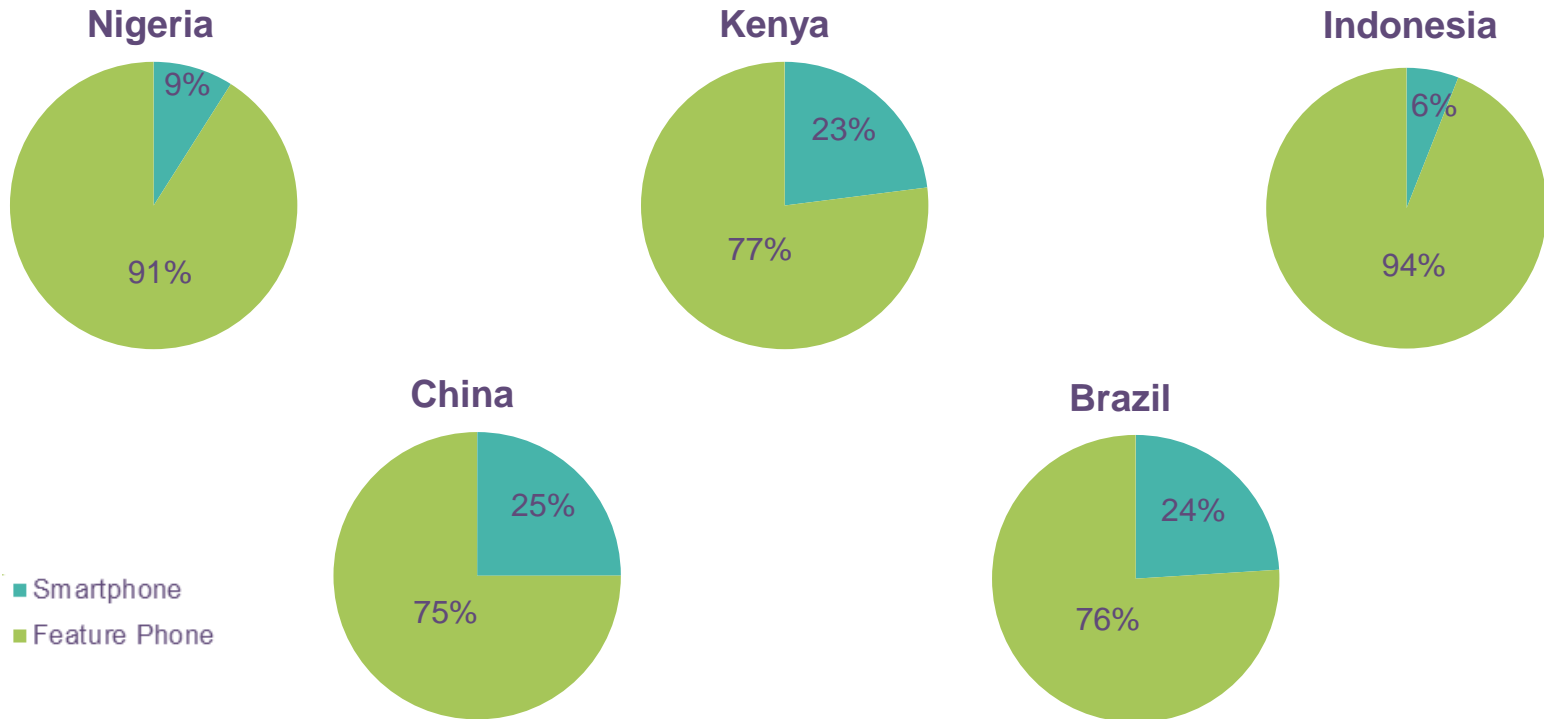
Mobile only is especially prevalent in the less developed markets



Countries: Nigeria, Kenya, Indonesia, China, Brazil, UK
N=15,953

Feature phones dominate the mobile only internet generation

Mobile Only Internet Generation - Device Ownership



Countries: Nigeria, Kenya, Indonesia, China, Brazil, UK
N=15,953

Mobile only web users in China

1,037 Chinese respondents

A representative sample profiled by mobile device manufacture, surveyed via the mobile internet

If you have any of your own questions you'd like to ask Chinese respondents, send them through to us at: info@ondeviceresearch.com

Who are the mobile only web users in China?

74% Male
65% Under 25
35% Over 25

56% Live in the city
44% Live in rural areas

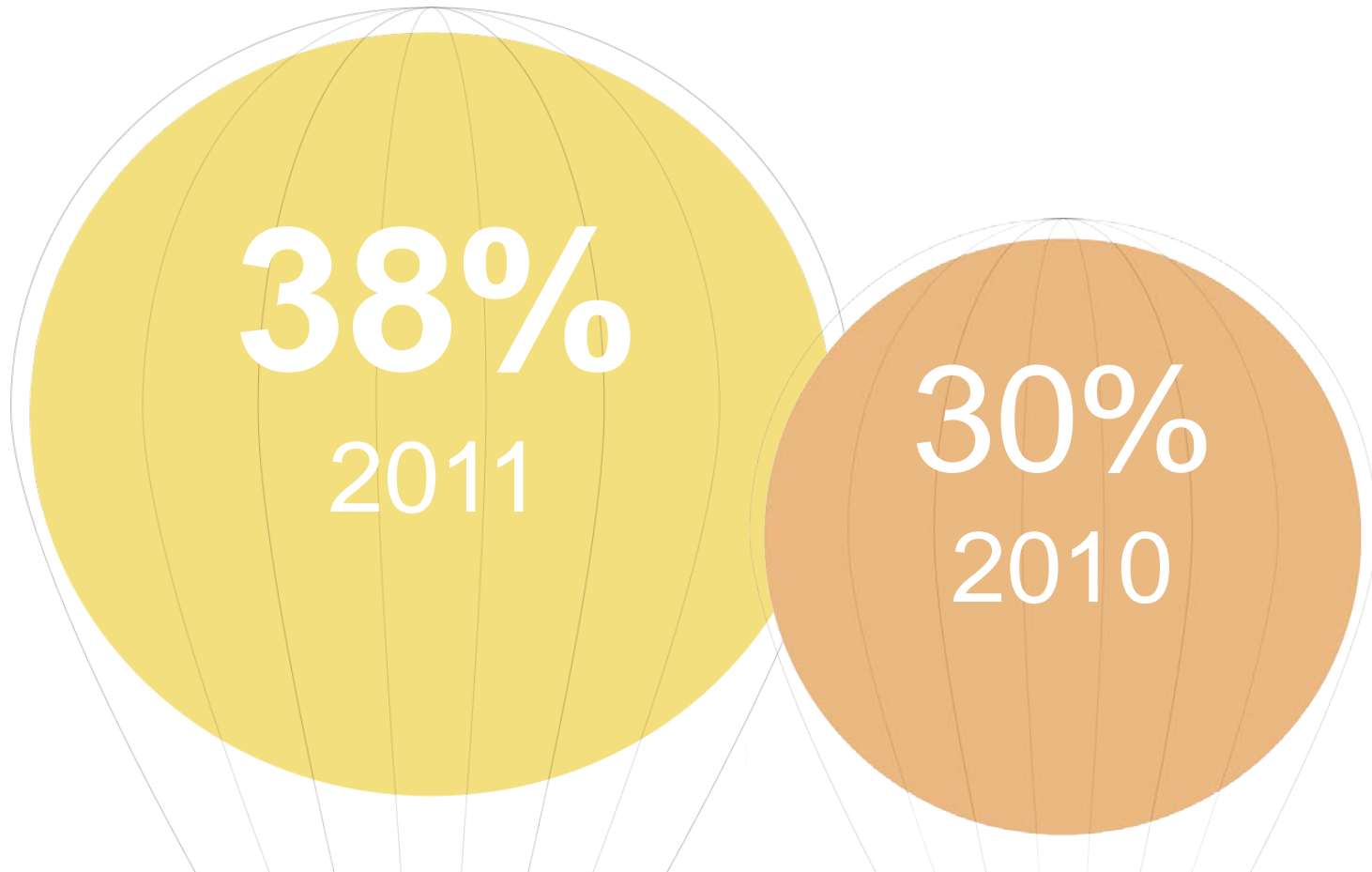


61% have a annual h/h
income of up to 5,000 Yuan

61% employed
28% student

68% have 3+ adults in the h/h
57% have children in the h/h

The growth of people only using their mobiles to access the internet in China, has increased 8ppts in a year



Countries: China
Date: 2011 N=1037
Date 2010 N = 1586

Web enabled mobile phones are connecting those who don't have access to a computer in China

Those who exclusively use mobile to access the Internet, what is their motivation?



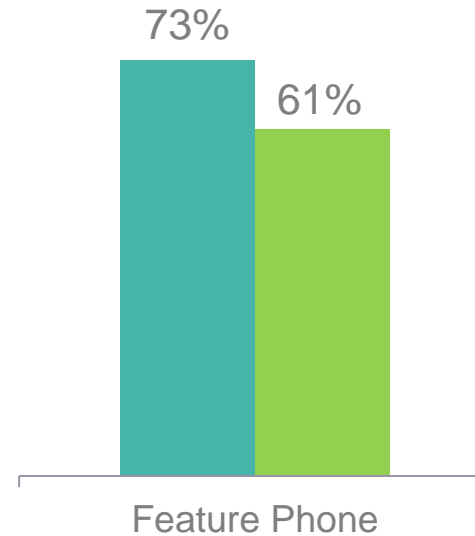
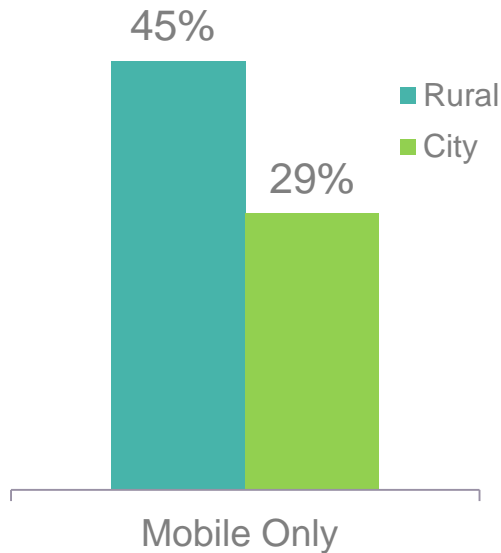
- **45%** don't have access to a computer
- **16%** It's easier than using a computer
- **14%** it's cheaper than using a computer
- **8%** It's faster than using a computer



The mobile only internet generation is particularly prevalent in rural areas

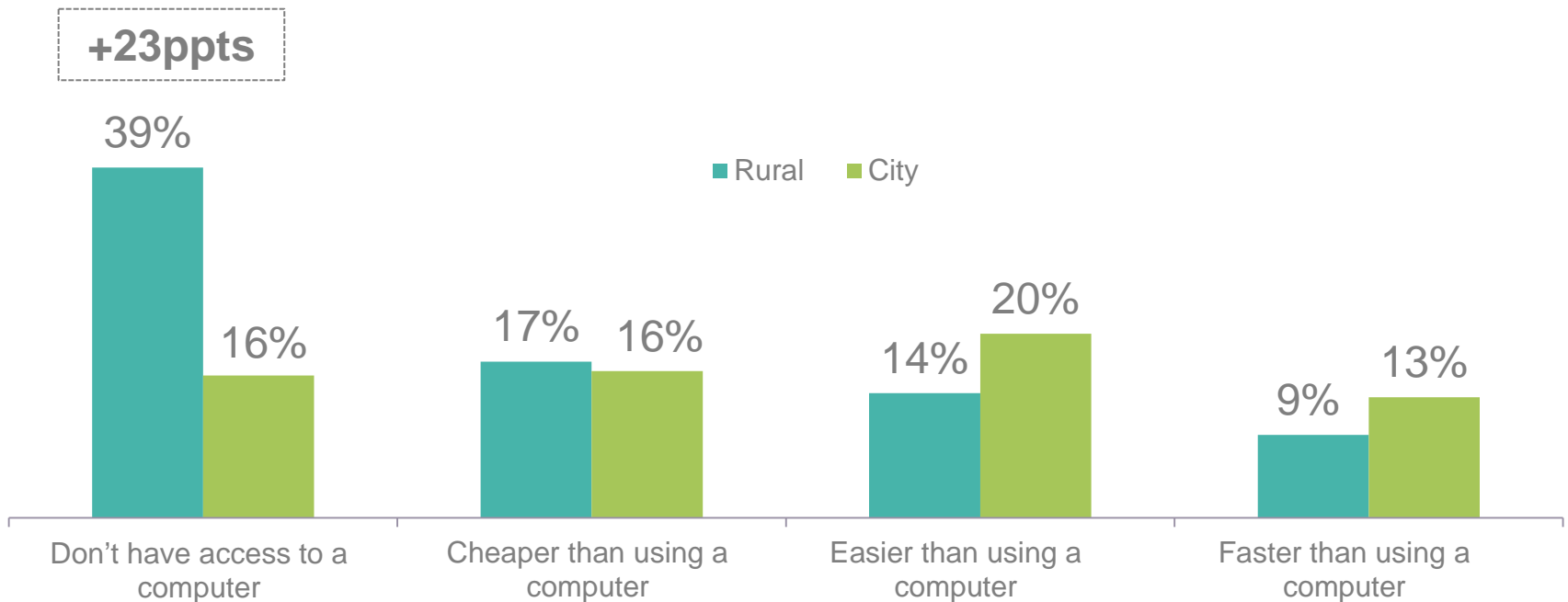
More likely to be mobile only
+16ppts

More likely to own a feature phone



For many in rural areas, mobile is the only way they can connect

Why do you use the internet on your mobile phone instead of on a computer?



Countries: China
N=1037

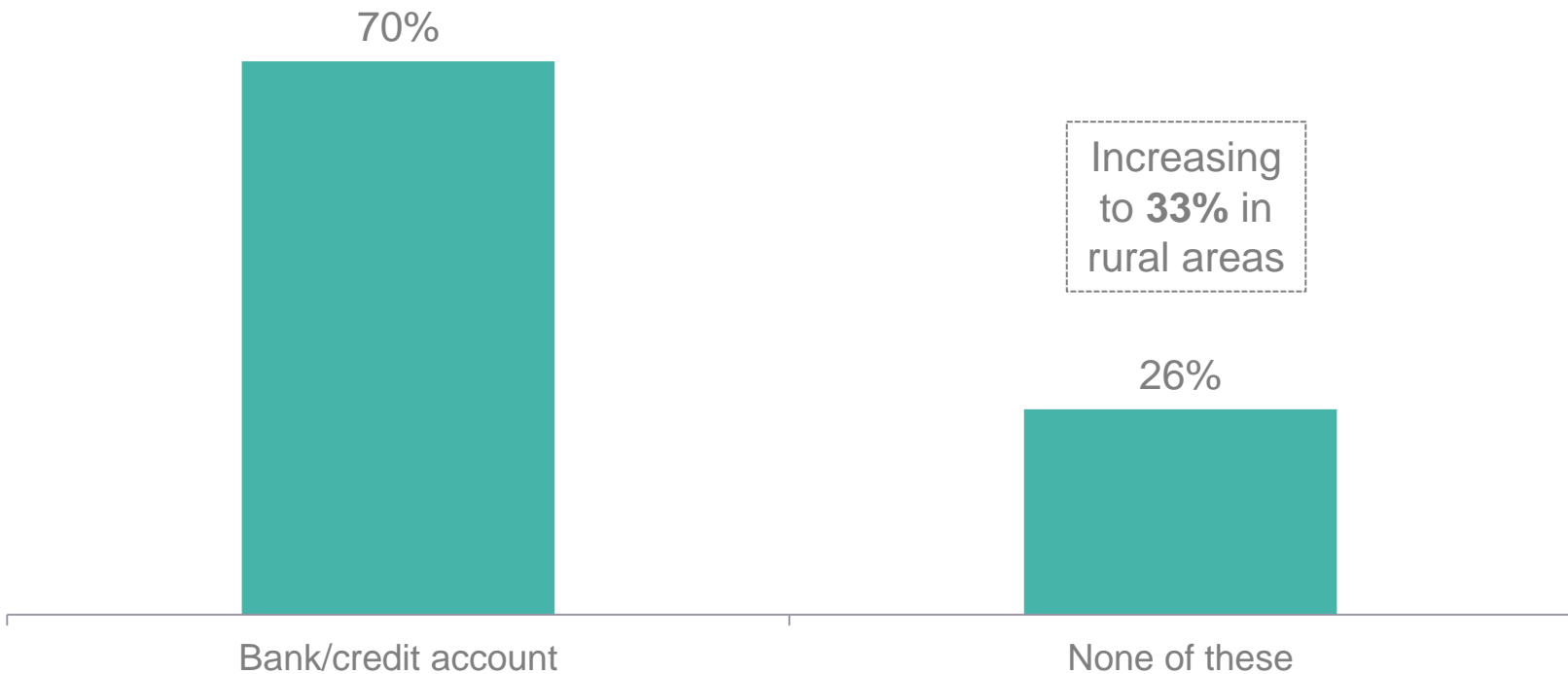
Chinese web users are keen internet browsers, using their device for multiple purposes

27% access the mobile web for at least an hour a day

90% play games on their mobile, with 40% playing every day and 17% playing for at least an hour a day

89% browse social networking sites on their phone, with 53% accessing sites every day and 20% browsing for an least an hour

Over a quarter of mobile internet users in China, don't have a bank/credit account, increasing in rural areas



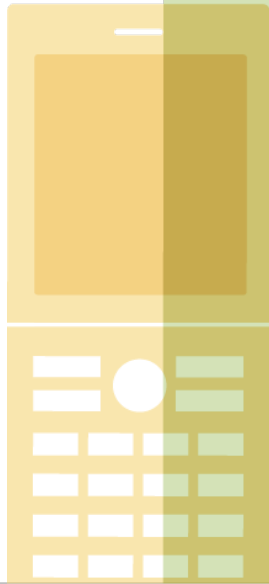
Countries: China
N=1037



Banking Opportunity:

25%

currently use mobile
banking, increasing to 30%
for Smartphone users



Do you have questions you'd like to ask Chinese respondents?

We're running a new survey tool that allows you to ask 5 questions, to 1000 profiled Chinese respondents.

Rates are extremely competitive. For a quote or if you have any questions, please get in contact at:

info@ondeviceresearch.com or call us: 0207 2786 627



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