



Wireless Web Access A Marker For 'Digital Innovators' Target Audience

Americans Who Access The Web Wirelessly Are Heavy Tech Hardware And Subscription Service Purchasers

October 25, 2005, New York, NY — New research released today by Ipsos Insight, the U.S. survey-based market research group, shows that people who access the Web wirelessly are particularly likely to invest in a wide range of products and services tied to consumption of digital content. Based on a representative survey of Web-connected American adults, these "wireless Webbers" are significantly more likely than those relying on wired broadband or dial-up access to own and use digital content products and services, making them a powerfully concentrated ad target.

"Wireless access is a marker for 'digital innovators,' the high-index investors in digital lifestyle," said Todd Board, SVP of Ipsos Insight's Technology & Communications practice. "From the standpoint of Tech advertisers, wireless Webbers exhibit a very targetable behavior over time, coupled with a desirable advertising profile. The specific 'marker behavior' they exhibit can be much more useful than the classic proxies used to drive media plans, such as demographic and broad media profiles."

Wireless access is strongly correlated with use of products and services supporting an enhanced digital experience (wireless home networks, digital cable, DVRs, projection TVs, hi-fi DVDs, dual disc CDs, and gaming consoles); greater digital portability (notebooks PCs, CD/DVD burner, MP3 players, camcorder, PDAs, and PEDs, or personal entertainment devices); and access to broader digital content (subscription to music services, satellite radio, and online gaming). Wireless Webbers are also more likely than others to use VoIP (voice over Internet protocol telephone service).

In addition, wireless Webbers are more likely than others online to report intent to purchase a fairly wide range of big ticket and/or "media immersion" investments – flat panel and HDTVs, Mac computers and desktops (consistent with media center-oriented PCs), media servers, and dual disc CDs. Board noted, "These results don't mean that wireless access 'causes' greater use of these various products and services, but that use of these products and services tends to catalyze and reinforce demand for others."

The wireless Webbers, as a group of digital innovators with inherently greater interest in all of these products and services, cut across demographic groups. Directionally they are a bit more affluent, but not fundamentally so, though they are significantly more likely to have post-graduate degrees. The breakdown of wireless Webbers by gender shows that 51 percent are male, and 49 percent are female. Board said, "The demographic profiles of wireless Webbers is strikingly similar to the overall Web audience, underscoring the common fact – too little acknowledged – that so often "surface" descriptors like demographics do a lousy job of anticipating either behaviors or underlying needs and motivations."

Ipsos Insight also recently completed research that suggests some openness to relevant advertising on wireless devices. However, Board said, "It's going to be a delicate negotiation with consumers. As the Web and wireless technology converge further, we'll see more interesting steps in the 'audience-access dance,' like the Yahoo-MSN instant messaging agreement, and Google and Comcast exploring AOL."

In related Ipsos Insight findings, Mac users reported at least directionally greater use of "digital innovator" products and services, when compared to notebook PC and desktop PC users. Board said, "These findings are not as definitive as our 'wireless Webber' findings, because the installed base of Mac users remains small. But obviously with the latest video iPod news, Apple's leadership in the mainstreaming of 'anywhere' digital content consumption aligns nicely with the broad



leaning we see among Mac users. You can easily envision the iTunes/iPod franchise serving as Apple's Trojan horse into the media center arena."

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Methodology

Data for this study were collected through an Internet-based sampling and data collection methodology using the Ipsos U.S. Internet Panel, and accurately reflects the online population (18 years and older).

A total of N=1,044 respondents completed the online questionnaire between August 23 and August 28, 2005. With a total sample size of n= 1,044 respondents, one can say with 95% certainty that the results are accurate to within +/- 3.03 percentage points. Of those, 19% (N=195) report some current access to the Internet via wireless technology, which could include mobile device access (though not just for email). In addition, 56% (N=587) report broadband access at home, and 31% (N=323) report dial-up access at home. (These percentages sum to more than 100% since these three groups overlap – statistical testing for significant differences appropriate to overlapping samples was used in this analysis.)

Due to the online sample frame used, and series of topics included, we believe these data may modestly overstate prevalence of wireless and broadband access. However, the point of this discussion is not precise prevalence of these groups, but profiling contrasts and business implications flowing from those contrasts.

About Ipsos Insight

Ipsos Insight, the flagship marketing research division of Ipsos in the U.S., has industry specialists serving companies in the following sectors: consumer products; technology and communications; health and pharmaceuticals; financial services; agrifood; energy and utilities; and lottery and gaming.

Ipsos Insight provides custom and tracking research services to domestic clients, as well as U.S.-based multinationals. It offers concept and product testing, package testing, attitude and usage studies, omnibuses, tracking systems, brand equity, price optimization, segmentation, marketing models, advanced analytics, and global research. Ipsos Insight is an Ipsos company, a leading global survey-based market research group. To learn more, please visit <http://www.ipsos-na.com/news/press/>

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