

Bonn, 24. November 2003

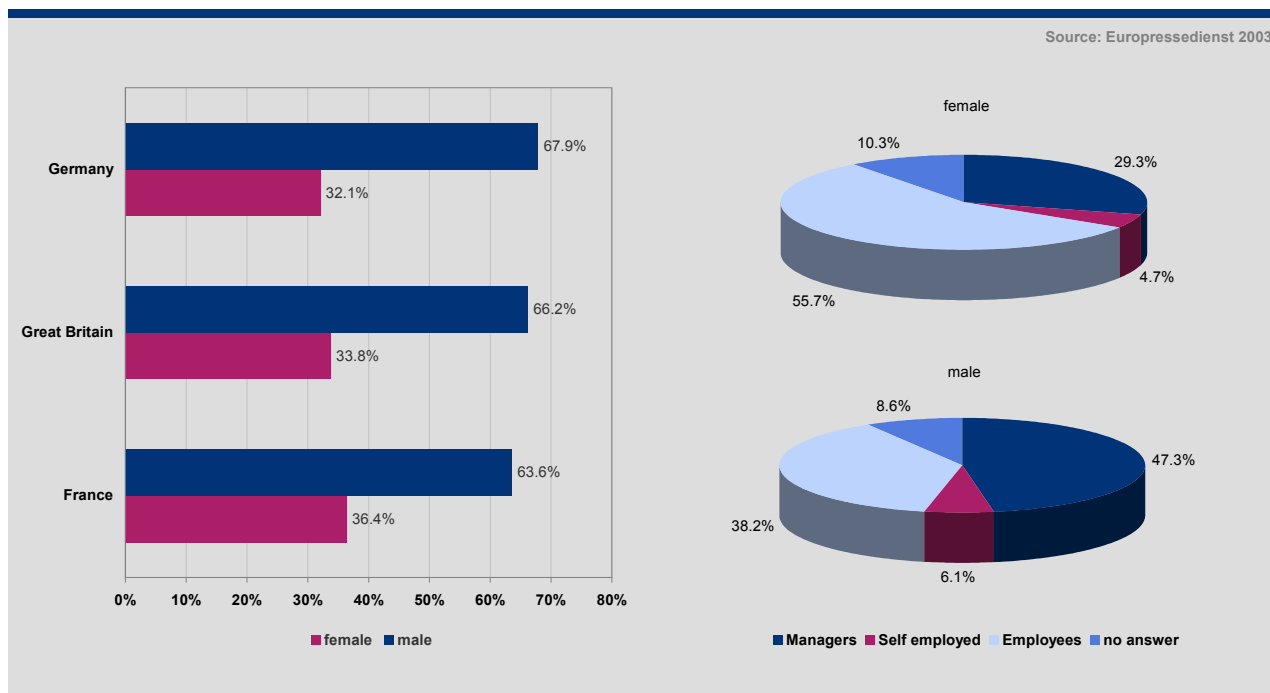
## Women are receptive to UMTS

Women are today's world messaging champions

For men, technology is an emotive subject. But not for women. First and foremost, women view technology from a functional perspective. But does this make them technophobic? At least as far as owning a mobile phone is concerned, women in no way lag behind the men. And according to the "ONE Mobilfunkbarometer 2003" survey, they are the leaders in SMS message transmission. European women have also shown themselves to be open to UMTS and the new range of mobile services such as e-mail and traffic information. This is particularly true of those who work in management positions and are hopeful of career advantages.

This result is supported by the current, international "UMTS" survey conducted by Europressedienst exclusively on behalf of Siemens mobile. Within the framework of this survey, conducted in August/September 2003, 1,000 professional people interviewed in the capital cities of each of Europe's three leading industrial nations, London, Paris and Berlin, were asked about their expectations, desires and assessments with regard to UMTS. This sample included 1,023 women.

Figure: proportion of female interviewees in the sample

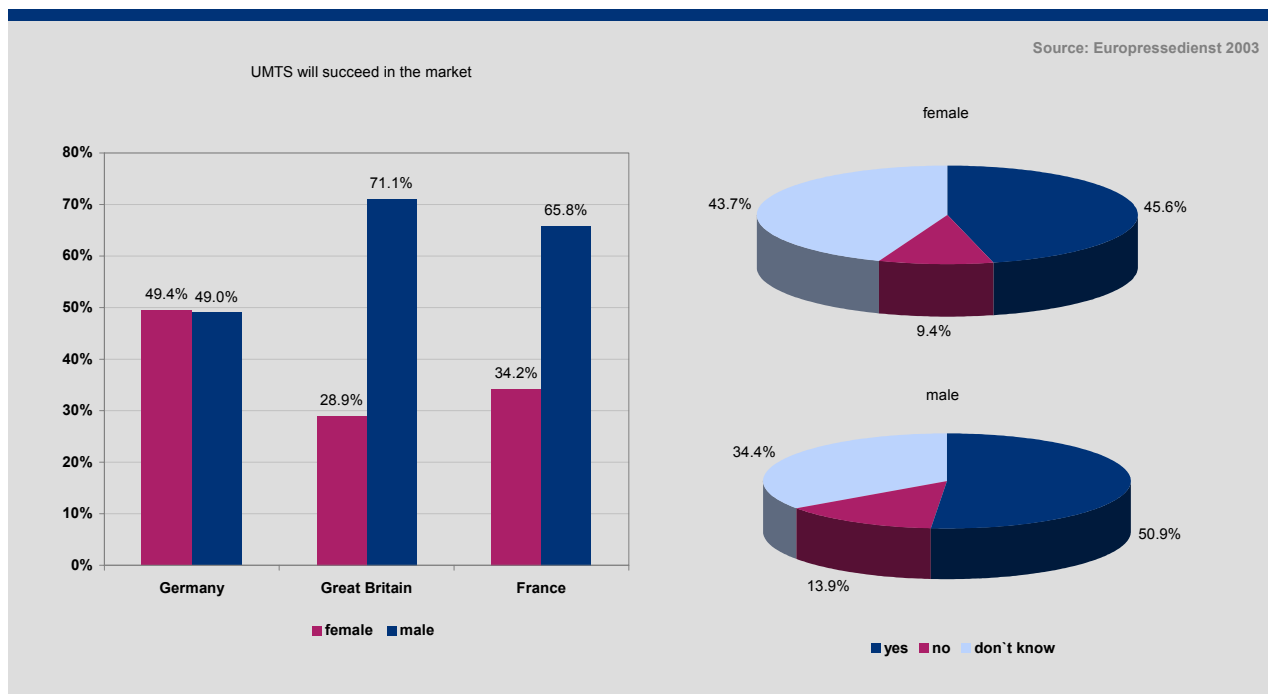


At 34.1 percent, women accounted for slightly more than a third of the sample. The proportion of women in the individual national sample fluctuated between 32.1 percent (Germany) and 36.4 percent (France). The proportion of women in managerial positions responsible for 5 or more subordinates was 29.3 percent. Amongst the men, the equivalent proportion was 47.3 percent. The French sample contained the largest proportion of women in managerial positions at 39.5 percent. The German and British samples followed with 24 and 23.2 percent respectively.

### German women are particularly optimistic

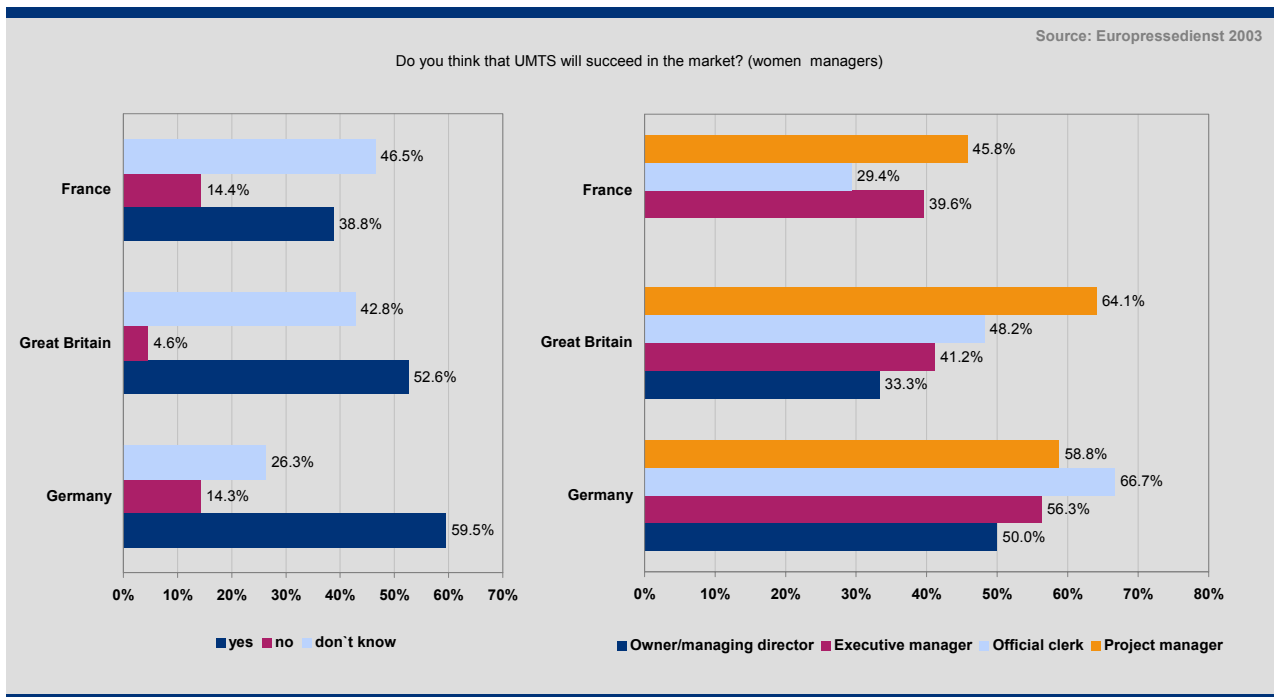
Almost half of all the 3,0000 interviewees are convinced that UMTS will succeed in their particular market. After the British and French men, German women form the most optimistic group. Overall, at 45.5 percent, the female interviewees are only slightly less optimistic than the men (50.9 percent). This is counterbalanced by the fact that the proportion of women who do not think UMTS will make it is, at 9.4 percent, lower than the corresponding male value (13.9 percent). Many women still need information and there are therefore more female (43.7 percent) than male (34.4 percent) "don't knows". It is primarily the British (48.5 percent) and French (46.5 percent) women who need further information.

Figure: Do you think that UMTS will succeed in the market?



Further clear country-specific differences can be identified. For example, there is a sharp divide between the responses obtained from the men and women in Great Britain and France. While optimism among men is at its highest at 71.1 percent in Great Britain ahead of France (65.8 percent), it is also the British and French women who are the most reticent with approval rates of 28.9 and 34.2 percent respectively. In Germany, the picture is very different: women, here, are even slightly more confident than the men, although the difference is marginal at 0.4 percent.

Figure: Do you think that UMTS will succeed in the market? (women managers)



Career women hope that UMTS will simplify their professional lives in a large number of situations. It is therefore no wonder that their statements regarding the success of UMTS are considerably more positive than in the overall sample, even if private and professional considerations are combined here.

Interestingly, high-ranking female official clerks in Germany are particularly convinced of the success of the new generation of mobile telephones. The conclusion is that the need for modern mobile communications is also, or indeed most pressing, present in the public sector which is often criticized as being outdated. Female project managers in all three countries, who hope that improved mobile connections will bring optimized project coordination and improved efficiency are also very convinced. Overall, female company managers in Germany and Great Britain are more reticent at 50 and 33.3 percent respectively.

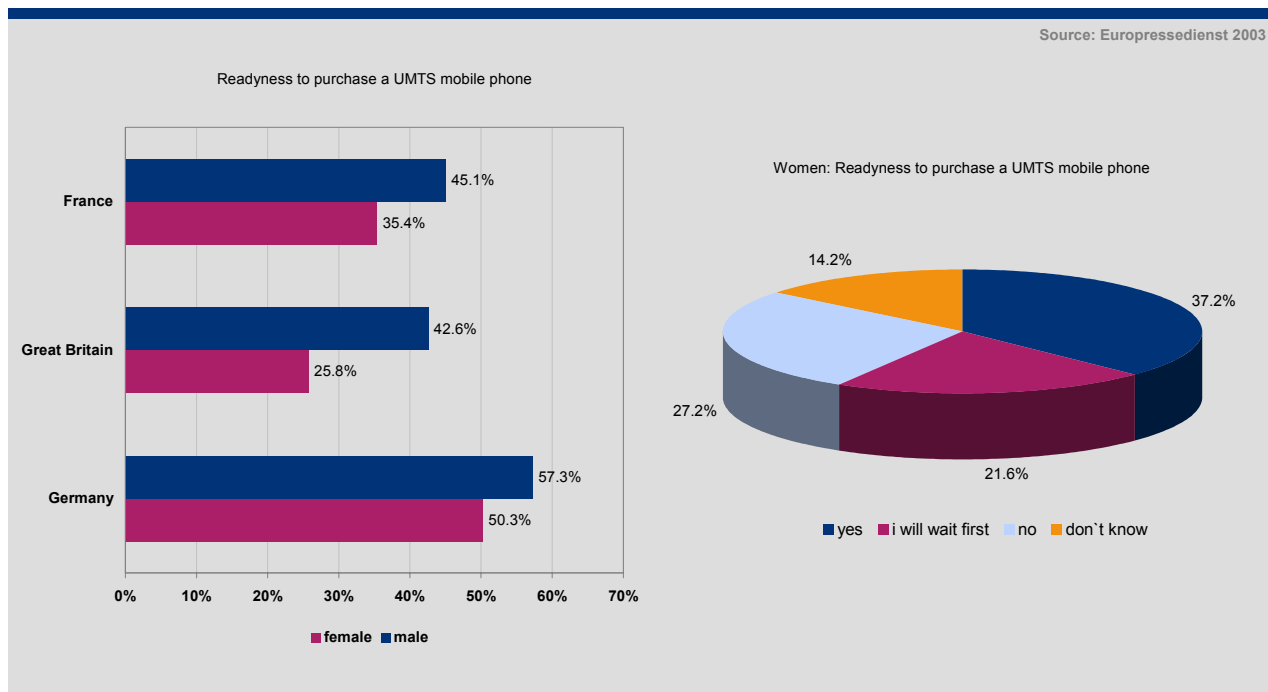
No female company managers were present in the French sample. In many cases, such women do not have the time to consider the issue before product introduction.

### Continued high requirement for information - women more rational in purchasing decisions

The underlying positive stance vis-à-vis UMTS feeds into responses to the subsequent question regarding purchasing intentions. Taking the sample as a whole, 37.2 percent of the women want to acquire a UMTS mobile telephone, with only 27.2 percent rejecting the move to the new generation of mobile devices. 21.6 percent of female interviewees want to wait and see what the new technology has to offer before purchasing and 14.2 percent have not yet decided. As can be seen here, opinions concerning UMTS are far from definite and the personal value-added is as yet insufficiently clear for many women. According to many interviewees, this will continue to be the case until the new technology and new services can be tried out for real.

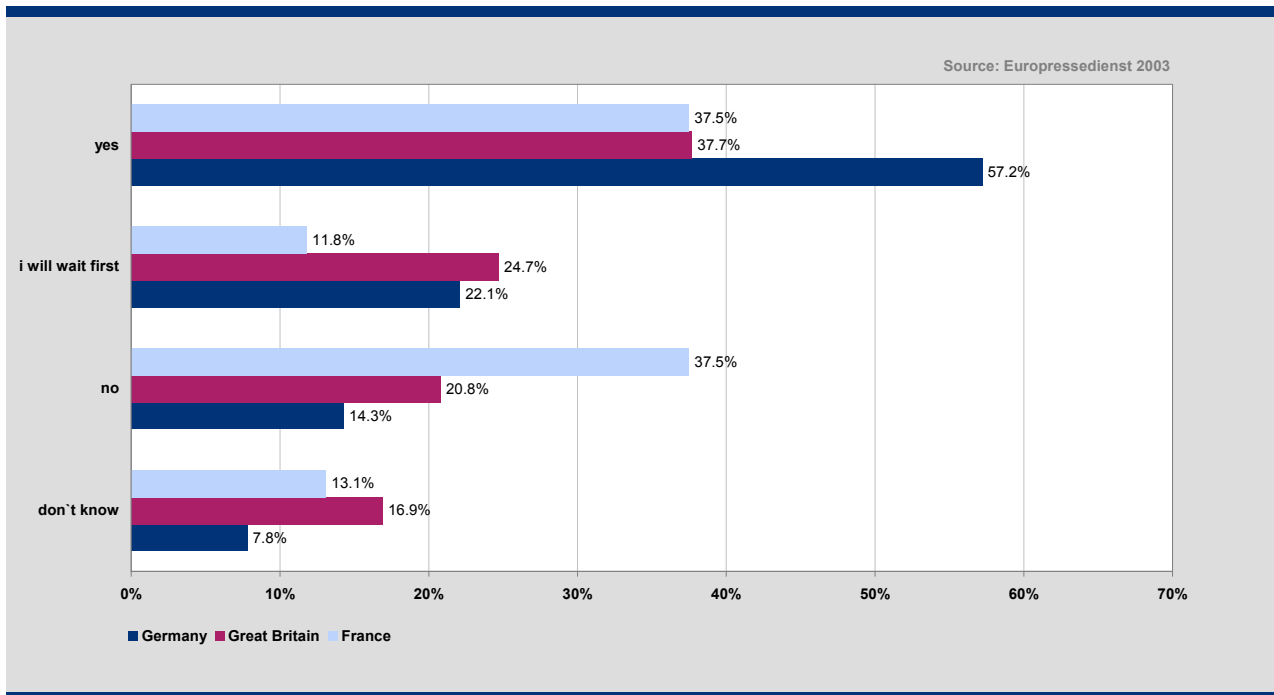
There is a greater readiness to purchase among male than female participants throughout the entire sample. The men tend to view the new technology more as a cult toy, whereas the women place the emphasis on the benefits it brings. The German interviewees - men and women alike - exhibit a greater readiness to purchase than their counterparts in the other countries.

Figure: Readiness to purchase a UMTS mobile telephone



Gender-specific differences are also comparatively small in the German sample. At 50.3 percent, readiness to purchase among the female German interviewees is higher than the corresponding levels in the French and British samples (35.4 and 25.8 percent respectively).

Figure: Readiness to purchase among female managers



Female managerial staff also exhibit considerably higher values in terms of readiness to purchase than women who have enjoyed a lesser level of professional success. At 57.2 percent, German career women are considerably ahead of their British (37.7 percent) and French (37.5 percent) counterparts in this respect.

### Women place emphasis on familiar applications

Alongside the assessment of future prospects and the readiness to purchase, women's behavior as users is also decisive for the success of UMTS. Are there already differences in the use of existing services? What is UMTS associated with? Where does the use of mobile services seem to be of value?

Most interviewees consider a mobile telephone to be primarily a device for making telephone calls. In response to the question concerning the most frequently used services, "telephoning" is therefore by far the most frequently cited application. However, it is also clear that not all those individuals who possess a mobile telephone actually use it first and foremost for telephoning. Alongside telephoning, the interviewees

primarily make use of short message services, with women making more use of this service than men in all three countries.

Table: Use of existing services

	Germany		Great Britain		France	
	female	male	female	male	female	male
to call	99.0%	99.7%	97.8%	98.6%	97.9%	98.6%
SMS	87.8%	79.0%	84.8%	80.7%	83.3%	73.9%
E-Mail	7.2%	17.0%	3.8%	13.1%	6.6%	8.4%
MMS	9.5%	7.0%	4.8%	8.6%	2.1%	2.3%
WAP	3.3%	10.9%	4.8%	10.1%	4.8%	6.3%
imode	1.0%	1.1%	0.3%	1.3%	1.5%	2.6%

Source: Europressedienst 2003

The picture is very different when we turn to innovative services. Here, it is the male interviewees who dominate the utilization statistics. Only in Germany is MMS used more frequently by women. It is the men who make more intensive use of all the other services, in particular e-mail and WAP. This can be explained in part by the higher proportion of male managerial staff in the sample - this is namely a target group in which it is regarded as fitting to change mobile telephone regularly. In contrast, women are more concerned with tried and trusted applications and possess considerably older mobile telephones that cannot implement many of the new services. Women tend to belong to the "followers" or "dynamic functionals" group, i.e. those people who are only interested in a new technology once its personal value-added has become evident.

### **Women are more interested in private use - men make most intensive use of business mobiles**

Responses to the question concerning the services of potential interest indicate a clear sequence in which it is necessary to differentiate between business and private use. First and foremost, differences can be observed in the business sector in which - with a few exceptions - the women's interest does not reach the levels exhibited by the male interviewees. The reason for this: significantly fewer women than men are employed in the upper echelons of business in which the use of mobile communications is essential.

In contrast, when it comes to private use, the male and female values are again much closer. Interest in UMTS for private purposes among the female German interviewees even exceeds - with the exception of data transfer - that of their male counterparts. Women's interest in the use of MMS is also greater than men's in all three countries.

Table: Most interesting UMTS services for women (in brackets: male interest levels)

	Germany		Great Britain		France	
	job related	private	job related	private	job related	private
E-Mail	38.1% (60.6%)	51.9% (49%)	29.9% (47.6%)	44.4% (48.5%)	23.9% (38.5%)	55.8% (57.1%)
Internet	34.9% (52.7%)	54.7% (47.9%)	21.6% (32.6%)	32.2% (43.1%)	24.7% (34.6%)	54.4% (57.9%)
Data transfer	33.4% (55.1%)	15.5% (17.6%)	22.2% (37.8%)	11.8% (19%)	25.8% (40.1%)	19% (33.2%)
Location based services	29.8% (37.6%)	50.2% (44.9%)	16.9% (30.9%)	30.8% (42.7%)	9.1% (15.7%)	43.7% (51.7%)
Traffic information	31.8% (38.5%)	51.6% (46.1%)	15.1% (29.5%)	34.4% (43.1%)	9.9% (19.3%)	48.1% (55.2%)
Newsservices	27.7% (38%)	49.4% (44.2%)	13.9% (26.3%)	26.6% (36.7%)	20.9% (21.9%)	60.4% (63.1%)
Video conferences/ photo phoning	15.5% (26.2%)	14.9% (12.8%)	19.5% (35.8%)	20.1% (27.6%)	12.1% (21.4%)	21.2% (28.6%)
MMS	12.3% (18.1%)	44.7% (36.6%)	8% (19.2%)	56.2% (53.3%)	6% (10.4%)	53.8% (52.5%)
Live stream-radio/ MP3	4.4% (4.3%)	48.8% (33.7%)	1.5% (3.5%)	29% (34%)	4.1% (3.8%)	51.6% (53.6%)

Source: Europressdienst 2003

Here, a mobile, fully functioning e-mail account is far and away the most frequently desired service. For the interviewees, the reception and transmission of e-mails and attachments has potential in the business and, to an even greater extent private sectors. Location-based services and traffic information aroused a high level of interest amongst private users. How do I get to the nearest motorway junction? Exactly when does the train leave? Where is that place I wanted to visit? Where is the best hotel? These were the type of thing that occurred to women when asked about the possible uses of mobile communications. The sending of photos or even videos, in the same way as the mobile Internet, is frequently cited. It is also noteworthy that in France, where the construction of the networks is only just getting properly underway, the term UMTS awakens fewer associations. The revolutionary nature of the new technology is unknown to many individuals. The networks tend to be associated more with WAP and i-mode. These are services that, although very successful in France, are criticized in particular because of the long load times and the relatively low transmission rates.

#### Summary:

Women primarily view technology from a functional perspective. They must be able to identify concrete value-added from the outset. Women in managerial positions are preparing the ground here; they already have precise ideas about how to make purposeful use of the technology. However, the possibilities of UMTS are as yet insufficiently well known - in particular to the French and British women. In a similar way as with services such as Internet, SMS and MMS in which, after an initial delay, women have now caught up with men, it is likely that women will hesitate before taking up the new, mobile UMTS services and will then exceed male utilization levels.

## Sample and statistical methods

This survey was conducted by Europressedienst on behalf of Siemens Mobil in France, Great Britain and Germany during August and September 2003. 1,000 employed people with a business appearance were interviewed in each country.

The interviews were all conducted on a one-to-one basis during CW 33-35 in the capital cities London, Paris and Berlin. They were held in VIP lounges, business centers and railway stations. The survey was conducted using a questionnaire with standardized questions and item selection.

The data was prepared for computer use to permit the analysis and evaluation of the questionnaires. The evaluations were performed using the computer program "Statistical Package for Social Science" (SPSS) which is the world's most widespread program package for statistical data analysis.

The first step in the data analysis was to calculate the frequency distributions. These frequency distributions were then used to create tables and graphs that provided a clear overview of the distribution of the variable values. The obtained information could then be assessed in more detail using crossed tables which form part of the bivariate analyses. Crossed tables examine relationships between two or more variables. The questions used in this questionnaire corresponded to scale levels that are a prerequisite for the use of crossed tables. They possess either a nominal scale, ordinal scale or ratio scale level.

Data was selected in order to make it possible to examine certain intermediate results in greater detail. Data selection consists of the selection of cases on the basis of certain criteria. Calculations following this type of data selection are then performed only for the selected cases. Thanks to data selection, it is possible to identify reciprocal relationships between individual groups of responses.

Minor discrepancies may occur in the individual numerical sequences due to rounding.