

Orange Digital Media Index

May 2009

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N.B. Figures refer to average monthly usage by all Orange UK customers between December 2008 – February 2009 unless otherwise clearly marked.

The previous report covered the period between July 2008 – September 2008. All percentages quoted are a comparison to this time period unless otherwise clearly marked.



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UK Personal Communication Services & Home

Customer Numbers:

- Pay As You Go and Pay Monthly mobile customers – 15.850 million (as of 31st March 2009)
- Home broadband customers – 977,000 (as of 31st March 2009)

Messaging and Voice

Average Messages

	SMS	MMS
Messages per month	1,769,743,592	9,486,527
Messages per week	442,435,916	2,371,631
Messages per day	58,991,453	316,217

Average Voice Calls (in minutes)

Voice calls per month	4,001,875,000
Voice calls per week	1,000,469,000
Voice calls per day	133,395,800

“We’ve seen a large increase in the number of SMS and MMS messages – up by 19% and 9% respectively in less than six months. This can partially be explained by people exchanging seasonal greeting messages – especially as more customers used high quality camera phones to send festive pictures to friends and relatives.

“The extraordinary weather conditions in February as well as the ability to donate by text to this year’s Comic Relief appeal also caused a sharp spike in SMS and voice calls.”

Paul Jevons, Director of Products, Portals and Services for Orange



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Mobile Data (on Handsets and Dongles)

Mobile Internet:

- Total customers on 3G mobile handsets and/or dongles – 3.824 million (as of 31st March 2009)

Mobile Data (GB):

Mobile data per month	386,612
Mobile data per week	90,209
Mobile data per day	12,887

“We’ve seen an increase by over 108% in the amount of data downloaded since the last report. This has followed improvements to devices including advanced 3G mobile handsets, matched with new price plans specifically created to increase mobile internet relevancy to consumers. Customers are now accessing the content they want, quicker and easier than ever before.”

Paul Jevons, Director of Products, Portals and Services for Orange

Dongles

Number of Dongle Subscriptions:

- Subscriptions surged by over 504% since the last report
- Dongle data usage has been significant with mobile network data traffic rising by 4,125% since February 2008

“We’ve seen a mobile data explosion with a phenomenal increase in dongle data usage. The number of dongle subscriptions surged dramatically over the period as people increasingly capitalise on the convenience, ease and flexibility of being able to connect wherever and whenever to the internet.”

Asif Aziz, Director of Broadband and Home for Orange



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Orange Mobile Internet

Orange World (the Orange mobile portal):

- 3.25m monthly users – increase of 26% since the previous report
- 176m page impressions per month – increase of 63% since the previous report

“People are increasingly accessing the internet via their mobile phones as the experience becomes quicker and simpler – the experience has become especially intuitive and seamless for customers with 3G handsets. The quantity of content designed specifically for the mobile portal is also increasing, helping to drive consumer traffic.”

Paul Jevons, Director of Products, Portals and Services for Orange

Top Ten Handsets for Accessing Orange World by Usage:

1. Sony Ericsson W910i
2. Nokia 6300
3. Samsung G600
4. Samsung F480
5. Sony Ericsson W580i
6. Nokia 6500s
7. Sony Ericsson K800i
8. Nokia N95
9. LG KU990
10. Sony Ericsson K810i

Mobile Search

Top 10 Categories of Search Terms that have shown the Biggest Increase since the last report:

Category	% increase since last report
Social Networking	68%
Ringtones & Downloads	67%
Games	50%
Search & Portals	50%
Jobs	48%
Glamour Content	36%
Music	34%
Horoscopes	33%
Entertainment	31%
Weather	31%



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Mobile Search Trends:

- Searches are up by 120% over the last 12 months
- Interest in celebrities is high and grew by five times in 2009 – top of the list was Cheryl Cole, Miley Cyrus and Jade Goody
- 45% of search clicks are on off-portal results, of which 65% are results from mobile-optimised web sites and 35% results from desktop web sites

“Unique users are up 47% over the last year as customers use the service to access valuable information on the go. The peaks in search terms provide an interesting cultural snap-shot. For instance, although you’d expect horoscopes to be spread roughly equally, Virgo (the most searched star sign) is searched 15 times more than Sagittarius.”

Steve Heald, Director of Partner Channels for Orange

Social Networking on Mobile

Social Networking:

- Monthly unique users – 946,564 (48% increase)
- Monthly page impressions – 380,027,340 (129% increase)
- Average number of pages per user, per month – 397 (53% increase)

The above figures relate to all customers that access social networking sites via Orange’s mobile internet.

“There has been an unprecedented upsurge in the number of customers accessing social networking sites via their mobile phones, with unique users increasing by almost 50% since the last report. Over the festive season customers repeatedly logged on to receive and send messages, upload holiday photos and check status updates.”

Mark Watts-Jones, Head of Product Management at Orange



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Orange Mobile Gaming

The number of games downloaded for the period is 771,278, up 8% from the previous report.

The top ten Games for the Period were:

- | | |
|--------------------------------|------------------------|
| 1. Tetris | 6. Monopoly Here & Now |
| 2. Sonic the Hedgehog – Part 1 | 7. Brain Genius |
| 3. Real Football Manager 2009 | 8. Zuma |
| 4. PAC-MAN | 9. Midnight Pool |
| 5. Blockbreaker Deluxe | 10. Miami Nights |

“Orange was the number one operator in 2008 for mobile gaming with a market share of 23% for downloads and 25% for revenues. Notably, eight of the top 10 games downloaded are part of our embedded games programme which provides customers with free trials – demonstrating its strength in drawing customers into the mobile gaming experience.”

Neil Holroyd, Head of Games Partnerships for Orange

Orange Mobile Music

On average more than 380,988 full tracks (singles) are downloaded each month from the Orange Music Store on Orange World, an increase of 38% from the last report.

Dec:	404,688
Jan:	382,418
Feb:	355,858

Top 10 Music Tracks (full-track downloads):

- | | |
|--------------------------------------|-------------------------------|
| 1. Alexandra Burke – ‘hallelujah’ | 6. Beyonce – ‘single ladies’ |
| 2. Lady Gaga – ‘just dance’ | 7. Kid Kudi – ‘day ‘n nite’ |
| 3. Leona Lewis – ‘run’ | 8. Akon – ‘right now (na na)’ |
| 4. Kings of Leon – ‘use somebody’ | 9. Lily Allen – ‘the fear’ |
| 5. James Morrison – ‘broken strings’ | 10. The Saturdays – ‘issues’ |

“The popularity of music downloads continues unabated, having increased by 38% since the previous report. The most popular track over the Christmas period was Alexandra Burke’s rendition of ‘halleluah,’ mirroring the Christmas number one in the pop charts.”

Deborah Tonroe, Head of Entertainment and Information for Orange



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Orange Mobile TV

Top 10 TV Channels for Mobile TV Usage:

- | | |
|--------------------------|----------------------|
| 1. Sky Sports 1 (22%) | 6. Sky Sports 2 (4%) |
| 2. Sky Sports News (13%) | 7. Kiss (3%) |
| 3. ITV (12%) | 8. Sky News (3%) |
| 4. Setanta Sports 1 (9%) | 9. My Movies (3%) |
| 5. Cartoon Network (5%) | 10. WWE (2%) |

The percentage in brackets reflects the consumer usage of that specific mobile TV channel.

“Mobile TV is hugely popular with sports fans who like to keep up-to-date on the latest results. The exciting premiership football season and the English football clubs competing in Europe were particularly popular.”

Jake Redford, Head of Mobile TV & Video Partnerships for Orange

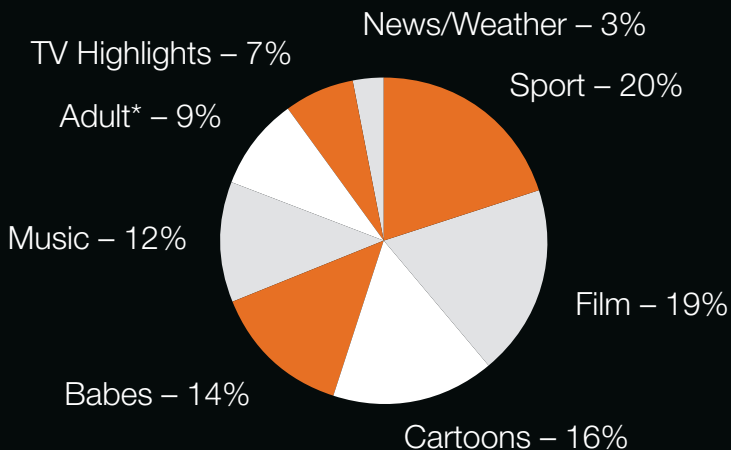
Top 10 Handsets for Mobile TV and Video by Usage:

- | | |
|-------------------------|------------------------|
| 1. Samsung F480 (Tocco) | 6. Sony Ericsson K800i |
| 2. Sony Ericsson W910i | 7. Sony Ericsson W200i |
| 3. LG KU990 (Viewty) | 8. Nokia 6500s |
| 4. Sony Ericsson W580i | 9. Nokia N95 |
| 5. Sony Ericsson W350i | 10. Samsung G600 |

Orange Mobile Video

2,329,051 videos were downloaded between December - February 2009, an increase of 38% from the last report.

Most Watched Video Categories over the Quarter:



*Access to adult content is restricted to customers over the age of 18 as verified under the Orange Safeguard Programme.



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Top 10 Video Downloads by Volume:

1. Alexandra Burke: Hallelujah (music clip)
2. Harry Potter and the Half-Blood Prince: New trailer (film clip)
3. South Park: A Christmas Song for Kyle's Mom (cartoons/animation clip)
4. Angry Kid: Full Bladder (cartoons/animation clip)
5. Beyonce: Single Ladies (music clip)
6. Lady GaGa and Colby O'Donis: Just Dance (music clip)
7. Angry Kid: Queen's Speech (cartoons/animation clip)
8. Terminator Salvation - Trailer (film clip)
9. South Park: Weight Gain 4000 - Beefcake! (cartoons/animation clip)
10. Transformers: Revenge of the Fallen - Trailer (film clip)

“People continue to download ‘snack-size’ videos, although for the first time music dominated the report’s video chart. This said, if the early popularity of the Transformers trailer is anything to go by – we expect it to be a blockbuster this year.”

Jake Redford, Head of Mobile TV & Video Partnerships

Zap!

‘Zap!’ is a video magazine service, free for customers and funded by advertising, on the mobile internet portal, Orange World.

Since the last report:

- The number of visitors to ‘Zap!’ has increased by 86%
- The number of total videos watched on ‘Zap!’ has increased by 327%
- Average number of videos watched per user on ‘Zap!’ increased by 63%
- New users to ‘Zap!’ have increased by 33%

“Because ‘Zap!’ is free, customers are prepared to view the more unusual video content that they would not ordinarily pay for. As a result, customers are downloading content up to four times as often as they do through other mobile video channels.

“We’ve also seen that the number of clips being viewed per customer is growing on a daily basis and the service has become increasingly popular amongst advertisers.”

Steve Heald, Director of Partner Channels for Orange



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Orange Film Site

In January Orange revamped its film website on the Orange.co.uk portal, designed to provide a rich and interactive experience for all film fans across the UK.

Since the last report:

- The number of unique visitors has increased by 48%
- The number of monthly page views has increased by 35%

The film site was revamped in January 2009. In only one month:

- The number of unique visitors had increased by 212%
- The number of monthly page views had increased by 74%

“We overhauled our film site earlier this year, positioning Orange Wednesdays at the heart of it. Since this time, usage of the site has been phenomenal and we’re really pleased with the take up and believe it has helped establish a real community presence on our portal.”

Paul Jevons, Director of Product Portals and Services, Orange UK

