



Orange Digital Media Index

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N.B. Figures refer to usage by all Orange UK customers between October 2009-December 2009 unless otherwise clearly marked. The previous report covered the period between December 2008-February 2009





UK Personal Communication Services and Home

Customer Numbers:

- Pay As You Go and Pay Monthly mobile customers – 16.5 million (as of 31st December 2009)
- Home internet customers – 900,000 (as of 31st December 2009)

Messaging and Voice

Voice calls have increased by 5% since the last report.

Average Voice Calls (in minutes):

| | |
|-----------------------|---------------|
| Voice calls per month | 4,209,000,000 |
| Voice calls per week | 961,000,000 |
| Voice calls per day | 137,000,000 |

Average Messages:

| | SMS | MMS |
|--------------------|---------------|------------|
| Messages per month | 1,950,000,000 | 10,000,000 |
| Messages per week | 466,000,000 | 2,300,000 |
| Messages per day | 64,000,000 | 329,000 |

There has been a large increase in the number of SMS and MMS messages sent across all demographic groups – with messages up 10% and 6% respectively since the last report.

SMS Demographic Trends:

- Women sent more SMS than men in every age group
- Adoption across all age groups has been above 90% except for the customers over 60, where adoption has been 86% for women and 79% for men
- A higher proportion of customers over the age of 60 have used roaming SMS than under 60's
- Pay Monthly users over the age of 60 sent 18% of their texts abroad compared to 13% for under 60's



MMS Demographic Trends:


- Women across all age groups sent significantly more MMS than men
- 60 year old women sent 48% more than men in the same age group
- The use of MMS abroad has been strong in the over 60 age group with women leading the way. They have been the second strongest age group after the 25-34 year olds

Mobile Internet

Orange World (the Orange Mobile Portal):

- 3.41 million monthly users – increase of 5% since the previous report
- 186 million page impressions per month – increase of 6% since the previous report
- Of the customers accessing Orange World, 57% are Pay As You Go customers and 43% Pay Monthly customers
- Saturday is the most popular day to visit Orange World





Customers have been staying on Orange World for longer. The average visit in December 2009 lasted 17 minutes and 6 seconds, up from 14 minutes and 9 seconds in March 2009.

Average visit duration:

| | |
|----------|--------------|
| October | 16:32 |
| November | 16:36 |
| December | 17:06 |

Demographic Trends:

- 43% of customers accessing Orange World were women
- 57% of customers accessing Orange World were men
- 18% of customers accessing Orange World were aged between 25-29



Top ten handsets for accessing Orange World by usage:

1. LG KP501
2. LG KS360
3. Samsung F480
4. Nokia 5800
5. Nokia 6300
6. Samsung G600
7. Sony Ericsson K800i
8. Samsung S5230
9. Samsung S5600
10. Nokia 6500s





Mobile Search

Categories of search terms that have shown the biggest increase since last year's report:

| Category | % increase |
|-------------------|------------|
| Celebrities | 800% |
| Music | 115% |
| Entertainment | 40% |
| Social networking | 38% |
| Search engines | 26% |


The most searched for celebrities during October-December 2009 included:

1. Cheryl Cole
2. Miley Cyrus
3. Robert Pattinson
4. Emma Watson
5. Amanda Holden
6. Vanessa Hudgens
7. Taylor Lautner
8. Danielle Lloyd
9. Billie Piper
10. Lindsay Lohan

The most searched for television programmes were:

1. Big Brother
2. Eastenders
3. Family Guy
4. Doctor Who
5. Simpsons
6. Hannah Montana
7. Hollyoaks
8. X Factor
9. Spongebob
10. Dancing on Ice





“Search terms provide an interesting gauge of British popular culture, with the nation’s sweetheart Cheryl Cole topping the chart as the most searched for celebrity, raking in 40% more searches than her nearest rival, Miley Cyrus. Despite 2009 ratings falling for Big Brother, it tops the chart for the most searched TV programme during the research period, receiving 74% more than the X Factor and seeing off competition from Eastenders and Doctor Who.”

Steve Heald, Director of Partner Channels for Orange

Mobile Gaming

The number of games downloaded for the period is 639,948.

- At the end of 2009, Orange had 34% of the UK mobile gaming market, showing a market gain of 10% points retaining our position as the #1 gaming operator in the UK
- Sunday is the most popular day for downloading games
- Between 2 and 7pm each day is the most popular time for downloading games

Demographic Trends:


- Men like time-related challenges, while women prefer level-based, strategic games with less time pressure



Top 10 mobile games by usage:

1. Tetris
2. The SIMS 3
3. Sonic the Hedgehog – Part 1
4. Bejewelled
5. Monopoly Here and Now
6. Real Football Manager 2009
7. Miami Nights
8. Championship Manager 2009
9. Block Breaker Deluxe
10. Texas Hold Em Poker





“Most of the top 10 games are downloaded through our embedded games programme which demonstrates the strength and value of providing customers with free, pre-loaded content. Embedded game demos still account for over 30% of the Orange gaming revenues with over 40% of people actually buying from the demo.”

Neil Holroyd, Head of Games Partnerships for Orange

Mobile Music

Top 10 music tracks (full-track downloads):

1. Cheryl Cole – Fight for this Love
2. The Black Eyed Peas – Meet Me Halfway
3. Lady GaGa – Bad Romance
4. JLS – Everybody in Love
5. Taio Cruz – Break Your Heart
6. Jason Derulo – Whatcha Say
7. David Guetta feat – Sexy Bitch – Featuring Akon
8. The Black Eyed Peas – I Gotta Feeling
9. Michael Buble – Haven’t Met You Yet
10. N-Dubz – Playing with Fire

Orange Monkey

In July 2009, Orange launched Orange Monkey, the first music service that is accessible on all Pay As You Go handsets. Monkey lets people create, listen to and share playlists on the web and on any mobile, offering access to news, competitions and exclusive interviews with artists.

- **Two days after launch: Monkey accounted for 17% of online connections for Orange Pay As You Go tariffs. This rose to 25% in 3 weeks**
- **Monkey is Orange’s second best selling Pay As You Go tariff online**
- **The Pay As You Go segment increased from 30% share of music track consumption to now having 50/50 split with Pay Monthly**



“Orange Monkey is an exciting mobile proposition with an innovative business model that fills a gap in the music market. The wide variety of free music, which can be enjoyed on any handset, meets the high expectations of today’s young music lovers and is already proving to be one of our most popular tariffs.”
Simeon Bird, Head of Pay-As-You-Go Propositions for Orange

Mobile TV & Video

Top 10 TV channels for mobile TV usage:

1. Sky Sports One (24%)
2. Sky Sports Two (14%)
3. ITV1 (14%)
4. My Movies (11%)
5. Sky Sports Xtra (7%)
6. Sky at the Races (4%)
7. Channel 4 (4%)
8. Kerrang! (3%)
9. Cartoon Network (3%)
10. Eurosport 1 (2%)

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

Top 10 handsets for mobile TV and video by usage:

1. Nokia 5800
2. Samsung F480 (Tocco)
3. Sony Ericsson W995
4. Nokia N95
5. Nokia N97
6. Samsung S5600 (Preston)
7. Nokia 6500s
8. LG KU990 (Viewty)
9. Sony Ericsson P100 (Satio)
10. Sony Ericsson K800i

Orange TV available on selected handsets only

Demographic Trends:

- **71% of all mobile TV clips have been purchased by men and 29% have been purchased by women**
- **22-23 year old users purchased the most mobile TV content (22%)**
- **Male users over the age of 61 consumed 49% more mobile TV content than women in the same age group**





Orange Mobile Video

Most watched video categories over the quarter:

1. TV highlights (26%)
2. Cartoons/Comedy (22%)
3. Film (16%)
4. Music (13%)
5. Babes (15%)

(based on video downloads - not including adult)

Top 10 video downloads by volume:

1. Cheryl Cole: Fight For This Love (music clip)
2. Twilight: New Moon Trailer (film clip)
3. X Factor Final: Winner Joe sings The Climb (TV highlights clip)
4. Angry Kid: Darkside (cartoons/animation clip)
5. Paranormal Activity Trailer (film clip)
6. South Park: Cartman v Bart Simpson (cartoons/animation clip)
7. Taio Cruz: Break Your Heart (music clip)
8. X Factor Final: Joe sings Don't Stop Believing (TV highlights clip)
9. South Park: Spook-tacular – Chef sings Thriller (cartoons/animation clip)
10. Angry Kid: Queen's Speech (cartoons/animation clip)

Demographic Trends:

- 75% of all mobile videos have been purchased by men and 25% have been purchased by women
- 22-30 year old users purchased the most mobile video content (28%)
- In the over 61 year old category, men downloaded 59% more mobile video content than women in the same age group





“As viewing options expand, customers are choosing to consume TV and video in a variety of different formats. While Orange mobile TV and video continue to be popular, customers are also using TV streaming applications and downloading podcasts of their favourite shows to watch at their leisure. YouTube clips have also become hugely popular as the customers mirror their online experiences on the move.”

Deborah Tonroe, Head of Entertainment and Information for Orange

Social Networking

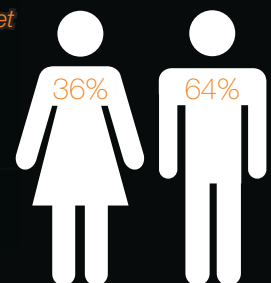
- Monthly unique users – 1,800,000 (99% increase)
- Monthly page impressions – 1,010,000,000 (166% increase)
- Average number of pages per user, per month – 535 (35% increase)



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

Demographic Trends:

- 64% of customers that accessed social networking sites via Orange’s mobile internet were men and 36% were women
- Men viewed 33% more pages than women on social networking sites



“The number of monthly social networking page impressions made via mobile phones on Orange has exceeded a billion for the first time. As the popularity of social networking continues to soar, so does the number of pages accessed per user - as people log-on more regularly to check status updates, messages and keep in touch with friends.”

Mark Watts-Jones, Head of Product Management at Orange





Devices

Touchscreen Devices

According to recent research by Canalys, over 60% of consumers want a touchscreen handset as their next mobile phone. Throughout 2009, Orange saw the emergence of more touchscreen devices making up approximately 30% of its active customer base.

In April 2009, Orange launched the Vegas, the cheapest, lightest and smallest touchscreen handset to hit the UK market and has since sold over 175,000 units.

iPhone / Mobile Applications

- **The average iPhone customer downloaded 9 applications (compared to 2 applications on other devices)**
- **Orange's touchscreen iPhone portal has been visited by more than 50,000 customers per week**
- **On average, iPhone customers use 165MB of data per month. This compares to an average of 115MB of data for other smartphone customers**

Two Orange iPhone applications have been especially popular:

- **Your Orange - with nearly 100,000 customers since launch, this self service iPhone application helps customers access and manage their account details from their handset**
- **Orange Wednesdays – this free application has seen over 600,000 downloads to-date**

Following the launch of our Orange Application Shop, we have seen over 400,000 downloads.

Practical apps such as Orange Football Live and Orange Search and quirky apps like Mobile Bug; Dr IQ Trainer; and Partner Tracker being among the customer favourites.

There's also been a strong uptake of interest (7% of all applications) in e-books since its launch.





Mobile Data (on Handsets and Dongles)

Mobile internet:

- Total customers on 3G mobile handsets and/or dongles rose 60% in a year to 5.34 million (as of 31st December 2009)

Mobile Data (GB) on Handsets and Dongles:

| | |
|-----------------------|---------|
| Mobile data per month | 436,000 |
| Mobile data per week | 99,600 |
| Mobile data per day | 14,200 |

Number of Dongle Subscriptions:

Subscriptions have surged by over 122% since the last report.

Orange Photography

- There was a 61% increase in the number of photos uploaded from mobile per month
- There are now over 63 million photos stored online
- During the period, customers turned their photos into personalised Christmas gifts such as books and calendars
- Photo uploads peaked at the weekend and on Monday morning between the hours of 8am and 12am as customers download their weekend snaps at work





Ringtagz

Orange Ringtagz provides ringback tones (the sound that you hear on the line when you call someone instead of the 'ring ring').

Top ten Ringtagz by usage:

1. Only Fools and Horses theme tune
2. Everybody in Love – JLS
3. The Exorcist theme tune
4. Ghostbusters theme tune
5. Police car siren
6. Misirlou - Pulp Fiction theme tune
7. The A Team theme tune
8. The Adams Family theme tune
9. I wish it could be Christmas every day
10. Eye of the Tiger – Rocky

“In the 4th quarter of 2009, the ‘Ringtagz’ service saw over 110,000 content purchases, representing a 25% growth on the previous quarter. Interestingly the top ten downloads are chiefly from famous films or TV series.”

Deborah Tonroe, Head of Entertainment and Information for Orange

Images

Top 10 Wallpapers

1. Kittens wrapped in a scarf
2. Pooh and Eeyore
3. Tazmanian Devil
4. Traditional Christmas snowman scene
5. UK flag
6. Panther image
7. Tom Christmas image (from Tom and Jerry)
8. Santa sleigh in Christmas sky
9. Cute penguin in Santa hat
10. Tropical fish tank with eel

