

Orange Digital Media Index

Summer / Autumn 2008

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*Please note all figures related to the time period July – September 2008 unless otherwise clearly marked.



Orange Digital Media Index – 2008

Orange UK Personal Communication Services and Home

Customer numbers:

- PAYG and PAYM mobile customers – 15.8 million (as of 30th September 2008)
- Home Broadband customers – 1.02 million (as of 30th September 2008)

Orange Messaging, Voice and Data

Average Messages

	SMS	MMS
Messages per month	1,485,413,613	8,691,280
Messages per week	371,353,403	2,172,820
Messages per day	49,513,787	289,709

Average Voice Calls (in minutes)

Voice calls per month	3,971,056,333
Voice calls per week	992,764,083
Voice calls per day	132,368,544

Mobile Data (GB)

Mobile data per month	185,823
Mobile data per week	46,455
Mobile data per day	6,194

“The popularity of messaging continues – with the number of text messages sent each month continuing to increase since the last Orange Digital Media Index. We’ve also seen a substantial growth in the amount of mobile data traffic as consumers increasingly use mobile phones to access and share all kinds of data via the mobile internet with their family and friends.”

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



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USB Dongles

Number of Dongle Subscriptions:

- Subscriptions surged by over 2000% since January
- Data usage has been significant in Q3 with mobile network data traffic doubling from Q208 to Q308 as a result of dongle sales to contract customers

“Dongles have been a real hit this year as customers are attracted to the extremely portable, personal and plug-and-play technology. What was initially a popular tool for businesses has now become a sought-after device across all consumer groups.”

Asif Aziz, Director of Broadband and Home for Orange

Orange Mobile Internet

Mobile Internet:

- Total customers on 3G mobile handsets and/or dongles – 2.9 million
- There have been significant increases in the 3G mobile broadband customer base, up 86% with 1.3 million customers added (year on year).

Orange World (the Orange mobile portal):

- 2.58m monthly users
- 108m page impressions per month
- Over 356,844 daily repeat visitors on average

“The popularity of mobile internet continues to rise and our customers now use the service as part of day-to-day life. Daily repeat customers are up 12% since the last report – in part this is due to the rise in social networking as customers regularly update their online status and log-on to stay up to speed on friends’ news and gossip.”

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

Mobile Search - largest percentage increase in search terms

- | | |
|----------------------|------|
| 1. Weather | 225% |
| 2. Jobs | 77% |
| 3. Social Networking | 67% |
| 4. Gambling | 34% |
| 5. Games | 32% |



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Mobile Search - key facts

- 30% increase in the number of searches since January
- 5m individual search terms in the last 12 months
- Major sporting events draw lots of searches for results and in-play reports. Common search terms related to sport over the summer included 'British Open Golf', 'Olympics' and 'Joe Calzaghe'
- The number of searches for lottery results rises very dramatically when the pot has been increased

"Searching on mobile increased by 30% since the previous Orange Digital Media Index as customers use the service to access valuable information on the go. Local searches soared by 100% as customers are increasingly using their mobiles to look up information on events, restaurants, and cinema listings in their neighbourhoods. The peaks in search terms respond to seasonal trends and provide a cultural snap-shot. For example, there has been a 50% increase in the search for football since the start of the new football season."

Deborah Tonroe, Head of Entertainment and Information for Orange

Top Ten Handsets for Accessing Orange World:

1. Sony Ericsson K800i
2. Nokia 6300
3. Sony Ericsson K810i
4. Samsung G600
5. Nokia 6500s
6. Samsung U600
7. Sony Ericsson W880i
8. Sony Ericsson W580i
9. Sony Ericsson W810i
10. LG U990

Social Networking on Mobile

- Monthly unique users - 640,000
- Monthly page impressions - 166,000,000
- Average number of pages per user, per month - 260

*Above figures relate to all customers that access social networking sites via the Orange mobile internet.

"Customers are increasingly spending their time accessing social networking via their mobile phones. This adoption has been aided by partnerships with the large social networking sites, but also by offering pricing plans designed specifically to make staying in touch wherever you are all the more easy. Since July Orange customers using social networking on their mobiles have increased by over 40% and monthly pages by over 57% as awareness grows and customers increasingly use mobile social networking as part of their daily routine."

Mark Watts-Jones, Head of Product Management at Orange



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Orange Mobile Gaming

The number of games downloaded for the quarter is 713,639, up 7% from the same period in 2007.

Top Ten Games:

- | | |
|-------------------------------|--------------------------|
| 1. 3 in 1 Retro Pack | 6. The Crystal Maze |
| 2. Sonic The Hedgehog: Part 1 | 7. Monopoly Here and Now |
| 3. Tetris | 8. Sonic at the Olympics |
| 4. Monopoly World | 9. Asphalt Urban GT 3 |
| 5. 2008 Beijing Olympics | 10. Bubble Bash |

“We have witnessed some interesting trends over the last few months. The nation’s interest in the Olympics is mirrored in the games sector with sports games like ‘Sonic at the Olympics’ and ‘2008 Beijing Olympics’ in the top-ten chart. However, classics like Tetris, Monopoly and other retro games dominate the top spots. The autumn months have seen the release of revised versions of the nations most loved games and early indications show a healthy growth in downloads.”

Neil Holroyd, Head of Games Partnerships for Orange

Orange Mobile Music

On average more than 276,555 full tracks (singles) are downloaded each month from the Orange Music Store on Orange World, an increase of 10.5% from the last Orange Digital Media Index.

- July: 262, 174
- August: 267, 479
- September: 300, 014

Top 10 Music Tracks (full-track downloads)

1. I Kissed A Girl – Katy Perry
2. All Summer Long – Album Version, Kid Rock
3. Disturbia – Rihanna
4. No Air Duet With Chris Brown – Main Version, Jordin Sparks feat. Chris Brown
5. Closer – Album Version, Ne-Yo
6. When I Grow Up – The Pussycat Dolls
7. Sex on Fire – Kings of Leon
8. The Man Who Can’t be Moved – The Script
9. Viva La Vida – Coldplay
10. Angel in the Night – Basshunter

“The natural affinity between music and mobile continues to make itself felt, with more than a 10% increase in the number of full tracks downloaded every month. This increase can in part be attributed to the rise in music-enabled handsets and the enhanced customer experience of previewing and purchasing music via mobile.”

Richard Wheeler, Head of Music Partnerships for Orange



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Orange Mobile TV

Top Ten Channel Ratings

(rated in percentages by number of minutes viewed)

1. Sky Sports 1 (29.97%)
2. ITV1 (12.93%)
3. Sky Sports News (10.32%)
4. Setanta Sports 1 (8.22%)
5. Sky Sports 2 (5.48%)
6. WWE (3.73%)
7. Sky News (2.54%)
8. Sky - At The Races (1.73%)
9. Sky Sports Three (1.67%)
10. National Geographic Channel (1.28%)

“In September consumers spent more time than ever before watching mobile TV. In terms of mobile TV trends, sports continued to top the viewing agenda - with consumers watching the Olympics and Wimbledon over the summer months, as well as the start of the Premier League.”

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

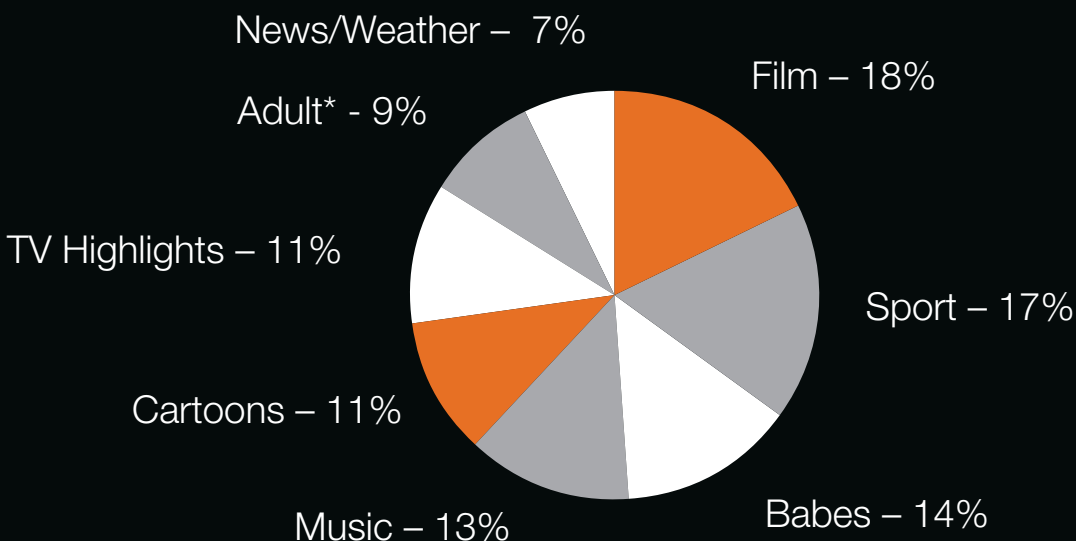
Top 10 Handsets for Mobile TV and Video by Usage

- | | |
|------------------------|-------------------------|
| 1. Nokia N95 | 6. Samsung F480 |
| 2. LG LGKU990 | 7. Nokia N82 |
| 3. Sony Ericsson K800i | 8. Nokia N73 |
| 4. Sony Ericsson K850i | 9. Nokia 6500s |
| 5. Sony Ericsson W910i | 10. Sony Ericsson K810i |

Orange Mobile Video

1,693,364 videos were downloaded between July- September 2008

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. The Dark Knight: Trailer (Film Clip)
2. Quantum of Solace: Trailer (Film Clip)
3. X Factor Audition Ant & Seb (TV Highlights Clip)
4. Angry Kid: Buzz Off (Cartoons/Animations Clip)
5. Harry Potter And The Half Blood Prince: Trailer (Film Clip)
6. Basshunter: All I Ever Wanted (Music)
7. Hellboy 2 – The Golden Army: Trailer (Film Clip)
8. Terminator Salvation: Trailer (Film Clip)
9. Angry Kid: Puerile (Cartoons/Animations Clip)
10. Kung Fu Panda: Chopsticks Clip (Film Clip)

“Consumers are increasingly downloading “snack-size” videos with film trailers, such as ‘The Dark Knight’ and ‘Quantum of Solace’ proving very popular. Clips of the popular TV show X Factor auditions also captured the imagination of consumers.”

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

Orange Photos

- 1.993m photos were uploaded from mobile phones to the Orange web album service

“The Average Usage Per User (AUPU) for photos remains the same as in the last Orange Digital Media Index, although we are finding that customers are increasingly uploading their photos by connecting their phones to their computers rather than paying for individual phone uploads.”

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

