



TRENDS IN MOBILE PHONES AND TABLETS BELOW THE PICK PRICE RANGE

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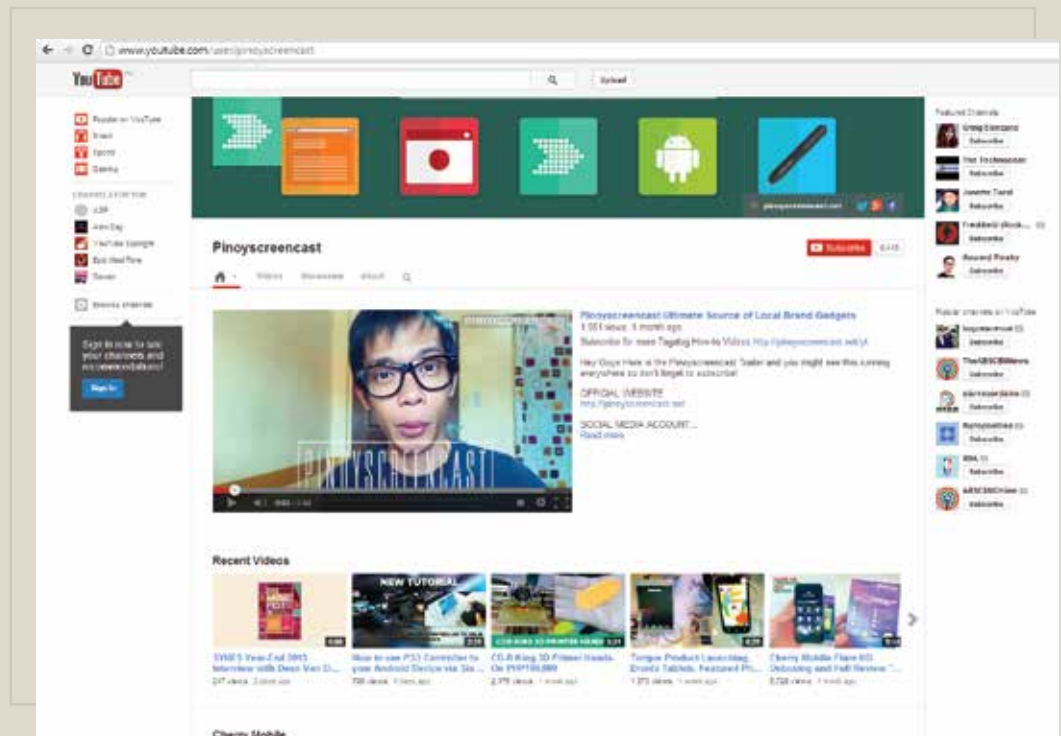


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Smartphones are Always On, Always with You



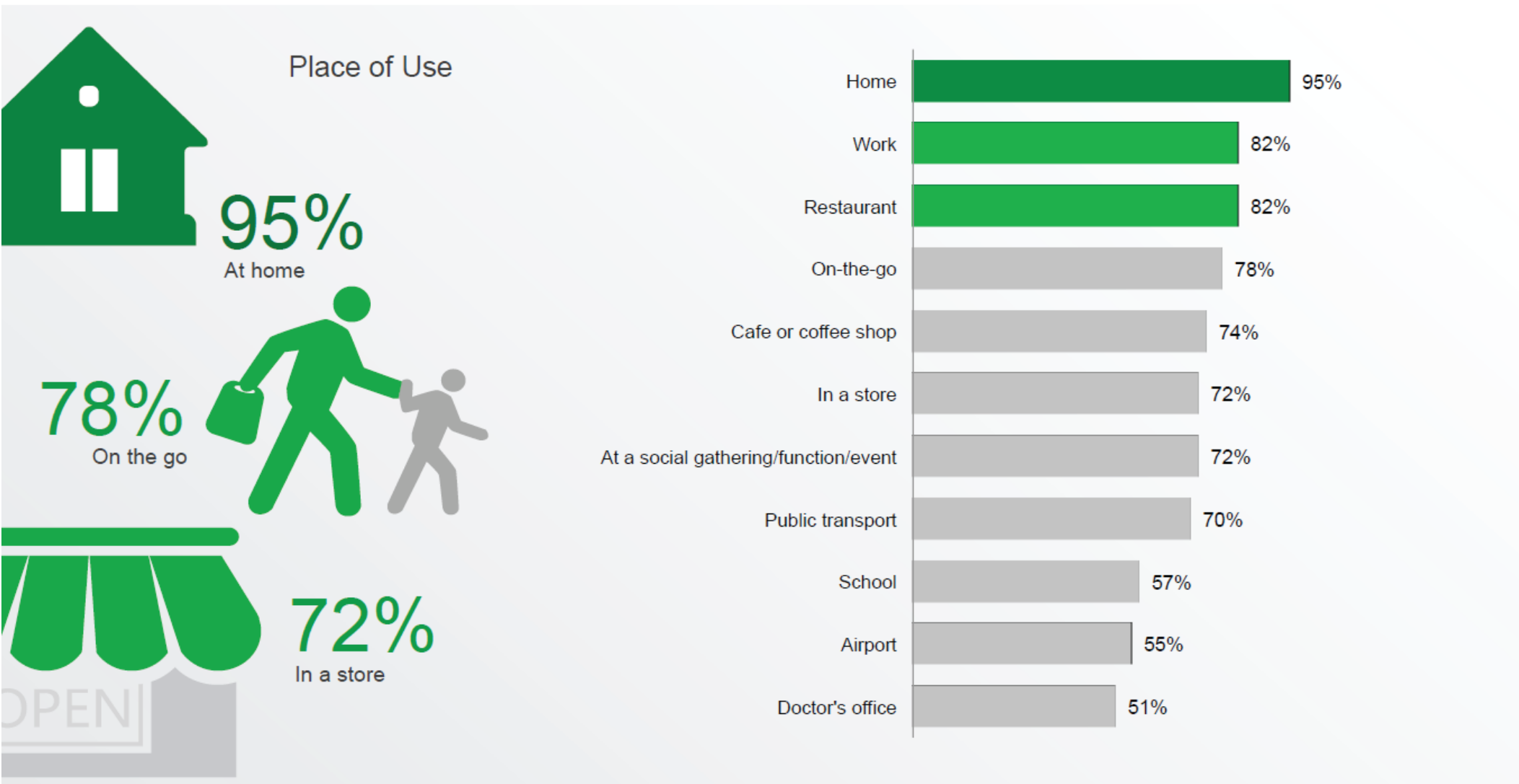
77%
don't leave home without
their device

Base: Private smartphone users who use the Internet in general, Smartphone n= 1.000
Q52: To what extent do you agree to each of these statements?, Top2 Boxes; scale from 5 – completely agree to 1 – completely disagree. "I don't leave house without my smartphone"

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Smartphones Are Used Everywhere



Base: Private smartphone users who use the Internet in general, Smartphone n= 1,000

Q16: Where do you tend to use your smartphone? Please first select at which locations you ever use it - even if only seldom.

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Smartphones Have Become so Important to Consumers that ...

39%

would rather give up
TV than their smartphone



Base: Private smartphone users who use the Internet in general, Smartphone n= 1,000

Q52: To what extent do you agree with each of these statements? Top2 Boxes; scale from 5 – completely agree to 1 – completely disagree.
would rather give up TV than my smartphone. "I would rather give up my TV / desktop PC than my smartphone"

Smartphones are a Major Access Point for Search

63%

search on their
smartphones
every day



Base: Private smartphone users who use the Internet in general and who are searching via search engine, Smartphone n= 954
Q31: How often do you do searches (via Google, Yahoo!, Bing, etc.) on your smartphone?

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13

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Smartphones are a Multi-Activity Portal



87%
Communication

Accessed a social network (e.g. updated a status message, checked messages or friends' pages)

80%

Emailed (sent or read)

76%



69%
Stay Informed

Read news on newspaper or magazine portals

57%

Reviewed websites blogs or message boards

57%



95%
Entertainment

Browsed the Internet

84%

Listened to music

78%

Played games

78%

Watched videos on a video sharing website (e.g. YouTube.com)

70%

Base: Private smartphone users who use the Internet in general, Smartphone n= 1.000

Q23: Which of the following activities do you do with your smartphone? Please indicate whether you ever do this at all.

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Smartphones Users are Avid Video Watchers



CLICK TO WATCH VIDEO

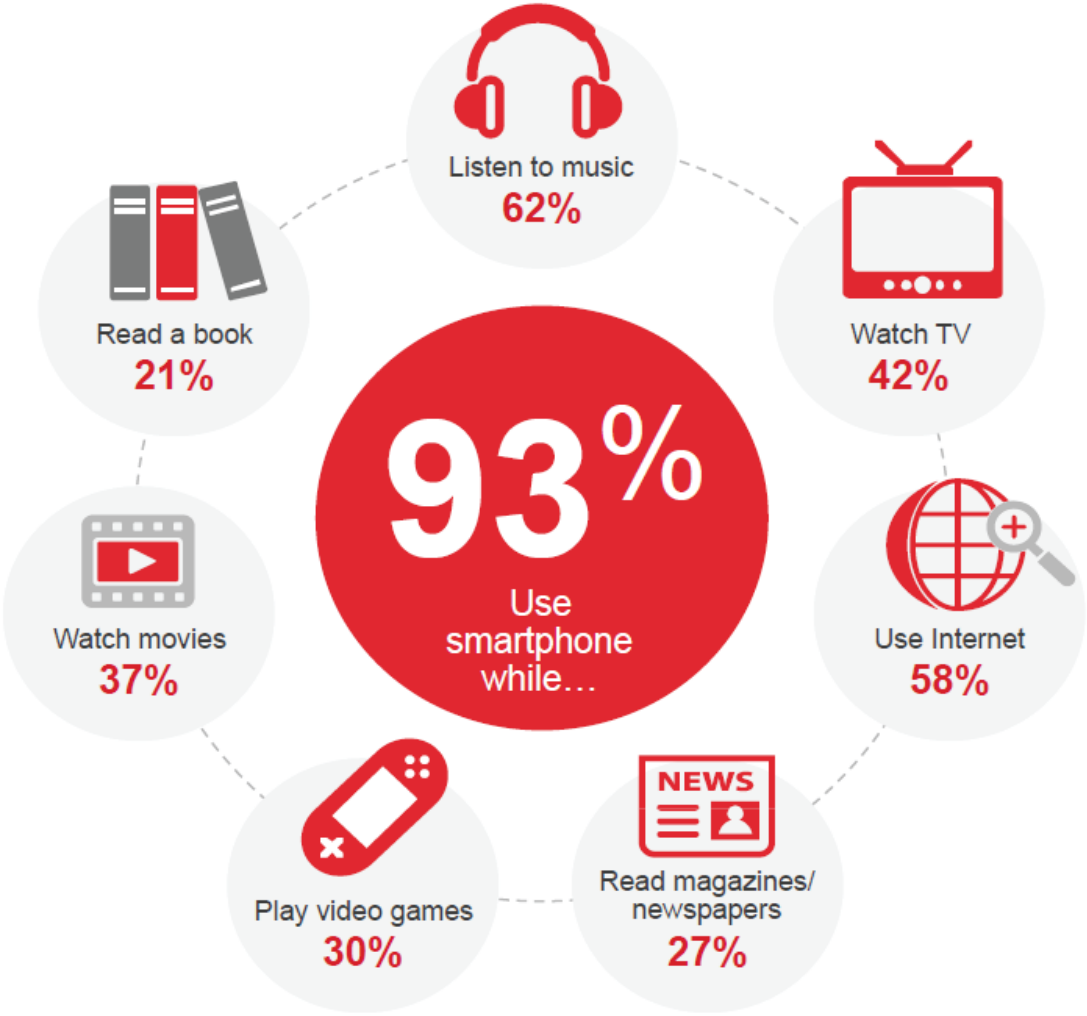
87%

watch video

34%

use video at least
once a day

Smartphones Are Used While Multi-tasking with Other Media



Base: Private smartphone users who use the Internet in general and who were online yesterday with their smartphone, n= 1000
Q22: When you use the Internet on your smartphone, which if any of the following – do you normally do at the same time?

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88%

have researched
a product or service
on their phone

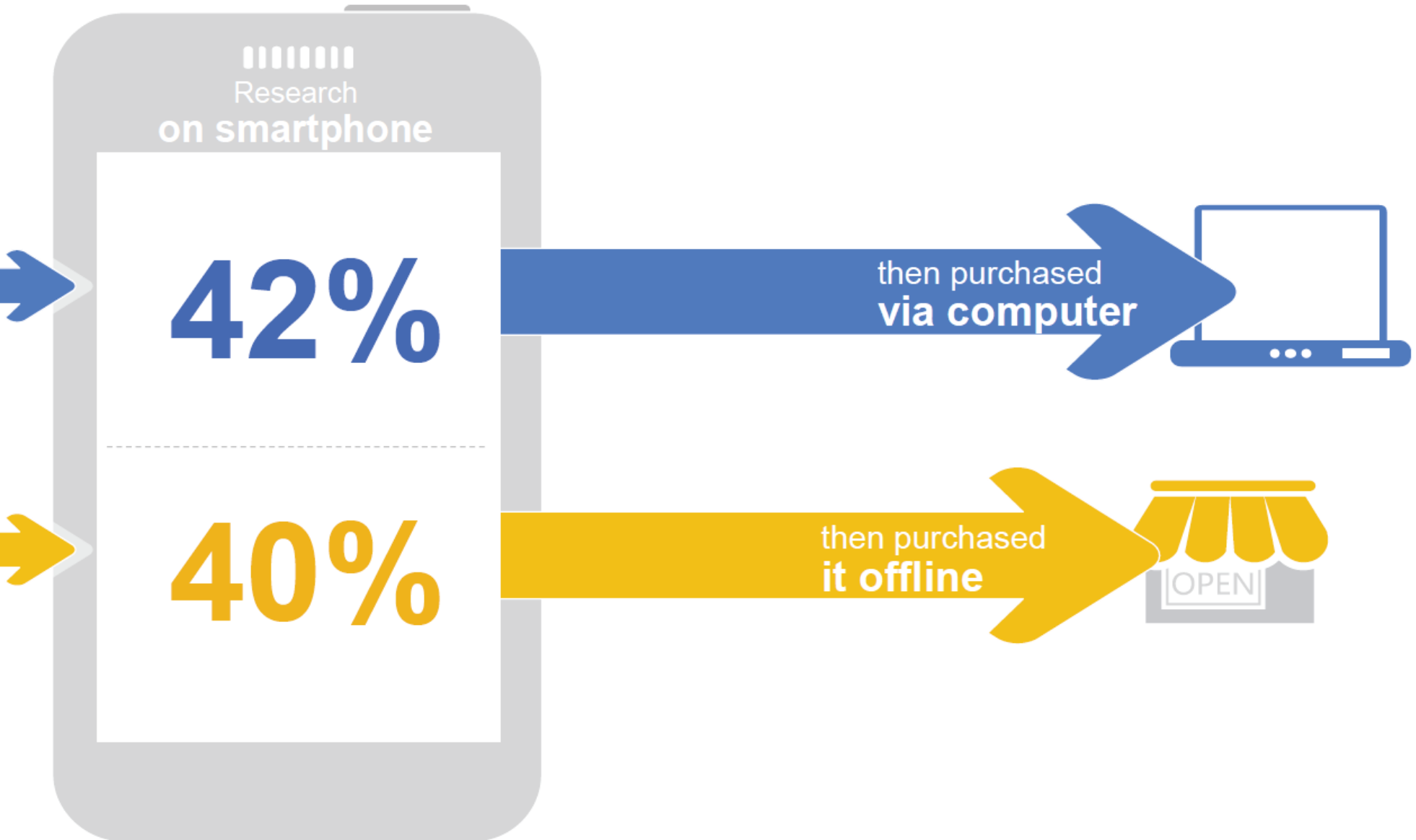


Base: Private smartphone users who use the Internet in general, Smartphone n= 1.000
Q51a: And where were you when you researched for products or services with your smartphone?

26

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Research that Starts on Smartphones Leads to Purchases Across Channels



Base: Private smartphone users who use the Internet in general, Smartphone n= 1.000

Q48: Listed below are various products or services. For each of these products or services please indicate which statement applies to you.

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Smartphones **BEFORE**

Small
Regular Glass
Single Sim
Pricey (above 10k)
Performance Average
Battery is Average
Average Display

Tablets **BEFORE**

Small
Regular Glass
No Sim Slot only 3G Dongle
Pricey (above 10k)
Performance Average
Battery is Ave
Average Display

Smartphones **NOW**

Large
Scratch Resistance
Dual Sim
Below 10k
High Performance
Battery Above Average
Mobile TV
Great Display

Tablets **NOW**

Large
Scratch Resistance
Single to Dual Sim /3G Capable
Below 10k
High Performance
Battery Above Average
Mobile TV
Great Display

Mobile Gadgets Are Cheaper Than Ever

MULTI PROCESSOR



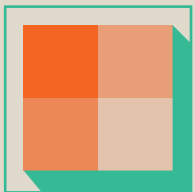
2011 and below

SINGLE CORE = *1 PROCESSOR*



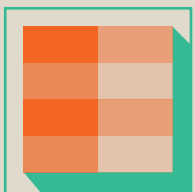
2012

DUAL CORE = *2 PROCESSORS*



2013

QUAD CORE = *4 PROCESSORS*



2014

OCTA CORE = *8 PROCESSORS*

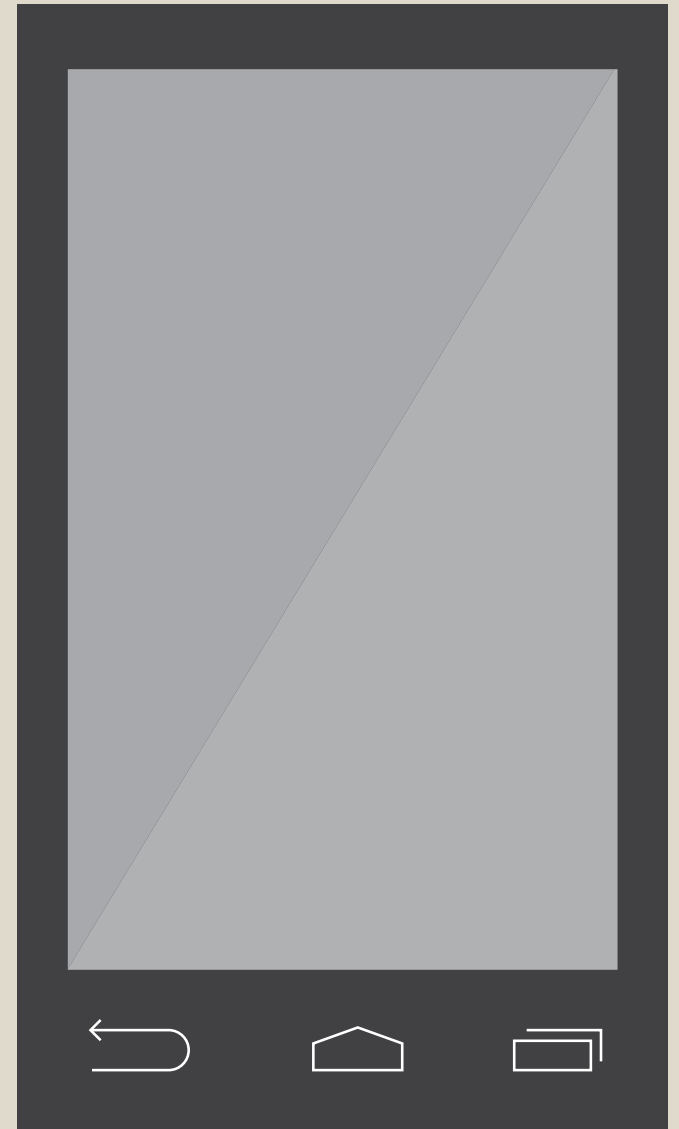
SCREEN SIZES

4+” Typical Size

5+” Average Size

6+” Phablet Size

7+” Tablet Size



Featured Phones are being
replaced by **Smartphones**

MILESTONE

Q4 2012 Dual Core in the Philippines Gain Popularity

Q2 2013 Launch of the Local Quad Core Phone

Q3 2013 High Performance Processor Smart Phones
Battery Efficient

Q1 2014 Octa Core Processor (8 Core) will start selling

Low Cost Smartphone and Tablet

Good Camera **Performance**

The Year Of The **Smartphone Camera**

Higher Resolution and Pixels Camera

FUTURE

Affordable Phone

High Performance

Great Camera

3G/HSPA+ Connectivity / LTE

Great Battery Life

Large Screens / High Resolution Display

Good For Starting Developers

The philippines will be mobile first **Q4 2014**

The rise of local
Smartphone and Tablet Brands

Thank You

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