

# INSIGHTS

## JiWire Mobile Audience Insights Report January-June 2009

JiWire is the leading Mobile Audience Media company, combining location and audience data to deliver targeted advertising across premium locations and wireless devices.

This Insights report provides a snapshot of usage trends and audience data over public Wi-Fi for the first half of 2009. This report is intended to highlight market trends for advertisers.

JiWire's Wi-Fi Media Channel is comprised of over 30,000 public Wi-Fi locations through partnerships with over 30 leading wireless broadband telecommunications providers, with venues such as airports, hotels and cafes that serve over 20 million unique users monthly. JiWire's registry of public Wi-Fi locations includes over 275,000 public Wi-Fi hotspots in 140 countries.

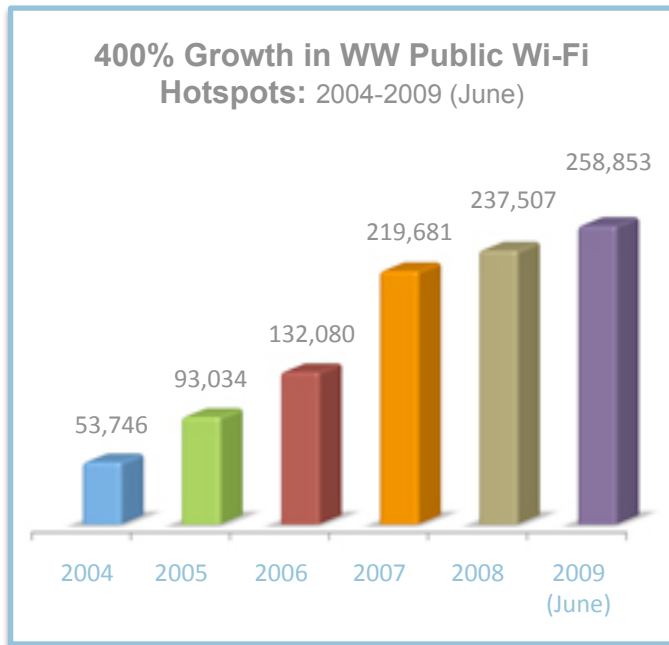
JiWire has been reaching on-the-go audiences since 2003.

For questions about this report, or for recommendations for future reports, please contact us at [Insights@jiwire.com](mailto:Insights@jiwire.com).



## Wi-Fi Media Channel: Highlights

Worldwide Public Wi-Fi Hotspots:  
2004-2009



Top 10 Countries for Public Wi-Fi:  
June 2009

Rank	Country	June 2009 # of Hotspots
1	United States	67,420
2	China	28,678
3	United Kingdom	27,459
4	France	25,619
5	Russian Fed.	14,499
6	Germany	14,435
7	South Korea	12,814
8	Japan	11,612
9	Sweden	6,664
10	Taiwan	5,386

Top 10 U.S. Cities for Public Wi-Fi:  
June 2009

Rank	U.S. Cities	June 2009 # of Hotspots
1	New York City	887
2	San Francisco	872
3	Chicago	792
4	Seattle	625
5	Houston	617
6	Los Angeles	505
7	Atlanta	453
8	San Diego	438
9	San Antonio	431
10	Austin	417

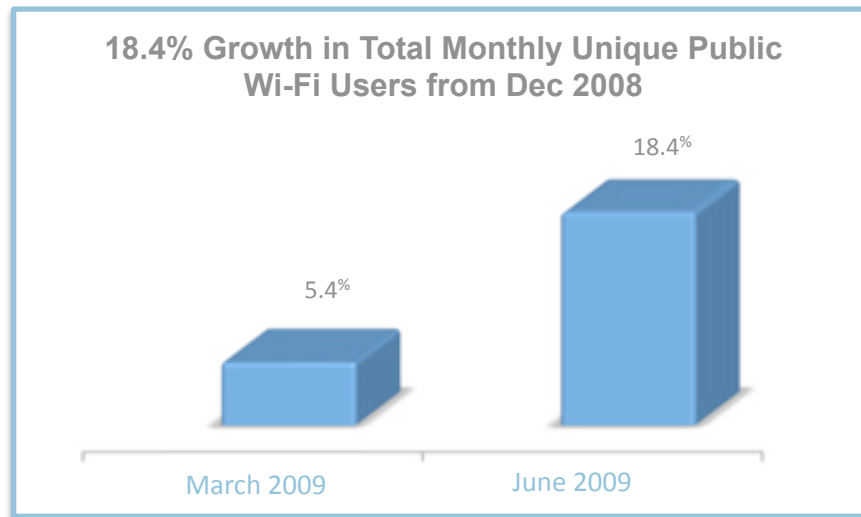
### Key Insights on Public Wi-Fi Hotspots Worldwide:

**The number of worldwide public Wi-Fi Hotspots continues to grow, and the majority remain paid locations:**

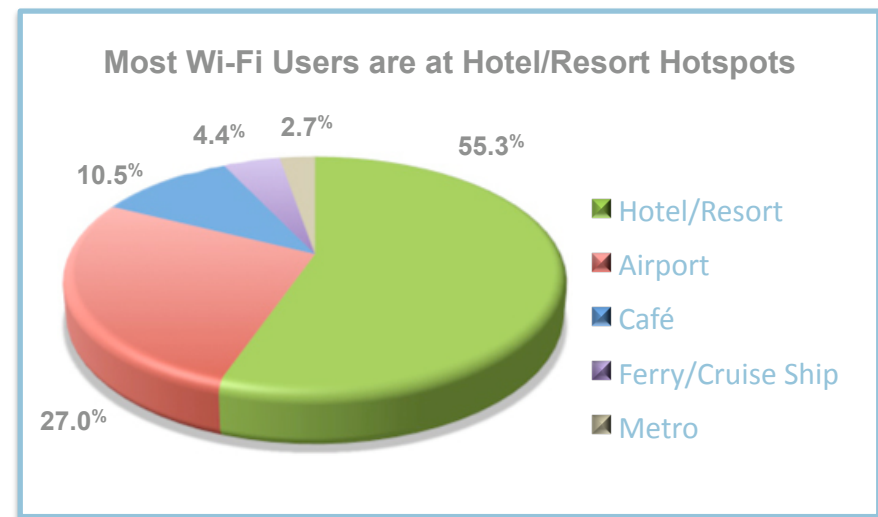
- 9% growth in worldwide public Wi-Fi Hotspots, January – June 2009.
- 81% of public Wi-Fi Hotspots worldwide are Paid/19% of public Wi-Fi Hotspots worldwide are Free.

## Wi-Fi Media Channel: Highlights

N.A. Wi-Fi Monthly User Growth from Dec 2008



N.A. Wi-Fi User Distribution: June 2009



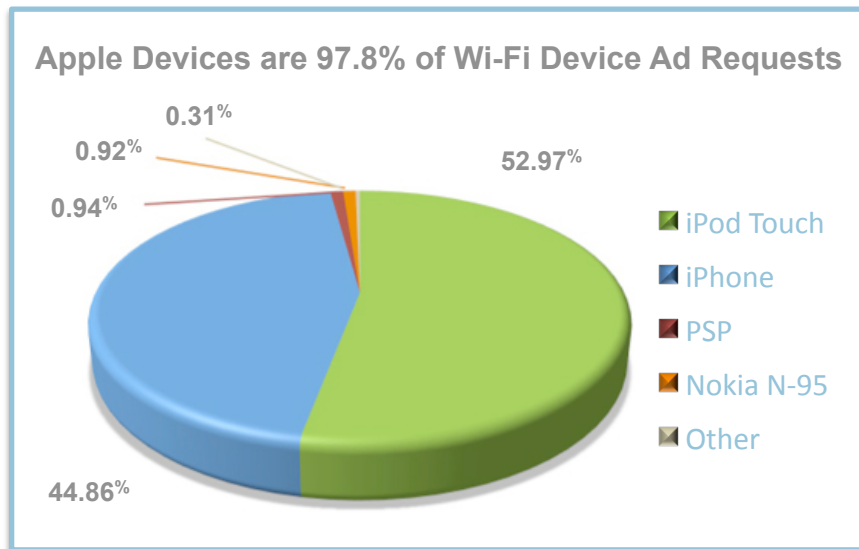
### Key Insights on Wi-Fi Usage:

**In the first half of 2009, we've seen growth in total monthly unique Wi-Fi users:**

- 18.4% increase in Monthly Total Users from December 2008 to June 2009.

## Wi-Fi Media Channel: Mobile Device Highlights

N.A. Overall Share of Mobile Device Ad Requests:  
January-June 2009



N.A. Top Mobile Devices:  
June 2009

Rank	Mobile Device	June 2009 % of Ad Requests	January 2009 Rank
1	iPod Touch	55.95%	1
2	iPhone	41.70%	2
3	PSP	1.10%	4
4	Nokia N-95	0.47%	3
5	PalmPre	0.41%	*debuted June 2009
6	WinCE Devices	0.32%	5
7	BlackBerry 8120	0.02%	*debuted April 2009
8	BlackBerry 8820	0.02%	*debuted April 2009
9	Nokia 770	0.01%	6
10	BlackBerry 9530	0.01%	*debuted June 2009

### Key Insights on Wi-Fi Devices:

**In the first half of 2009, we've seen a 79% increase in mobile device ad requests on public Wi-Fi hotspots.**

**Apple mobile devices were the top choice for Wi-Fi users in the first half of 2009:**

- Apple iPhone and iPod Touch represent 97.83% of the public Wi-Fi mobile device ad requests, Jan-June 2009.

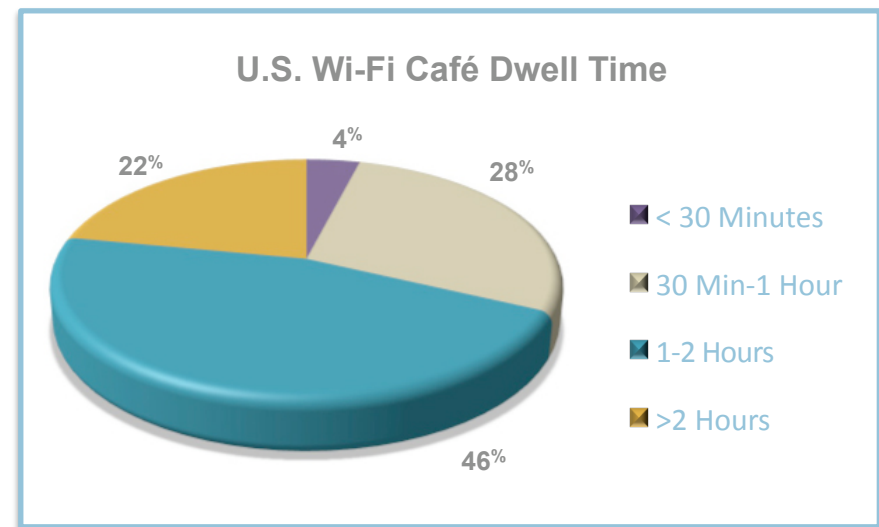
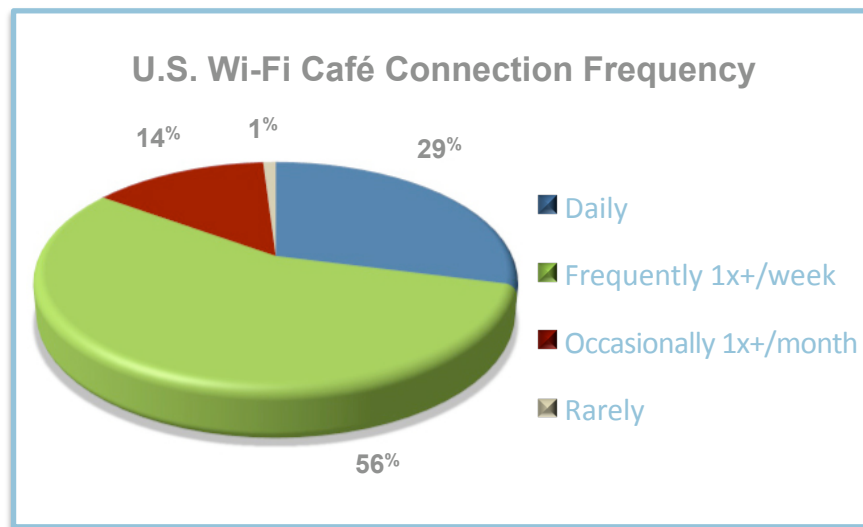
**Palm Pre surpassed other devices to debut as the #5 most popular mobile device in June 2009, within just 24 days of launch.**

**Wi-Fi enabled entertainment devices remain popular on public Wi-Fi hotspots:**

- Sony PSP and iPod Touch continue to remain in the Top 10

## Wi-Fi Media Channel: Café Spotlight

### U.S. Wi-Fi Usage Patterns in Cafes: June 2009



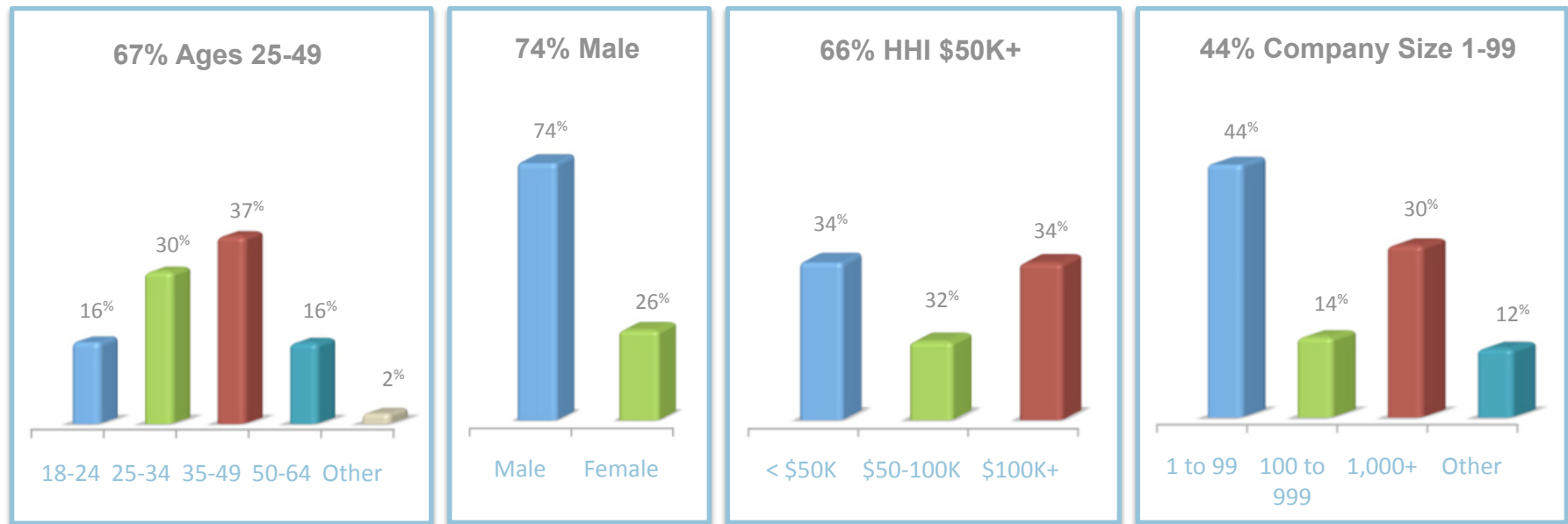
### Key Insights on U.S. Wi-Fi Café Usage:

**Wi-Fi Café Customers Connect Frequently, for Extended Periods of Time:**

- 85% of Wi-Fi Café customers connect at least once a week
- 68% of Wi-Fi Café customers get connected for over one hour

## Wi-Fi Media Channel: Café Consumer Profile

U.S. Wi-Fi Café Customer Profile: June 2009



### Key Insights on U.S. Wi-Fi Café Customers:

#### Wi-Fi Café Customers are Upscale, Male, and in Management:

- 40% Management Titles
- 19% Professional
- 23% Students
- 18% Other

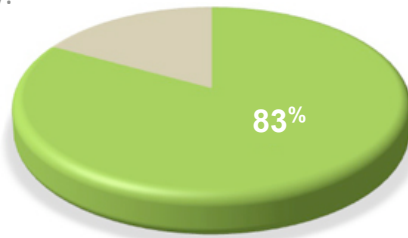
## Wi-Fi Media Channel: Café Consumer Profile

### U.S. Wi-Fi Café Local Customer Profile: June 2009

#### 83% of Wi-Fi Café Users are Connecting Locally

##### Of the 83% Connecting Locally:

- 41% Connect for Both Work and Fun
- 40% Connect for Work Only
- 19% Connect for Fun Only



### U.S. Wi-Fi Café Top 10 Cities\*: January-June 2009

Rank	City	Jan-June 2009 % of Ad Requests
1	New York City, NY	3.9%
2	Los Angeles, CA	3.6%
3	Chicago, IL	2.3%
4	Houston, TX	1.8%
5	San Diego, CA	1.7%
6	San Francisco, CA	1.4%
7	Dallas, TX	1.1%
8	San Jose, CA	0.9%
9	Washington D.C.	0.8%
10	Austin, TX	0.8%

### Key Insights on U.S. Wi-Fi Café Customers:

#### Wi-Fi Café customers are largely a local audience and connect for many purposes:

- 41% responded that they connect both locally for work and locally for fun.
- 56% search online for local information
- 53% visit social media sites

#### The Top 10 DMAs represent over half of ad requests, with broad distribution across cities as shown by data for the Top 10 Cities:

- 53% of Wi-Fi Café ad requests are represented by the Top 10 DMAs.
- 18% of Wi-Fi Café ad requests are represented by the Top 10 cities.

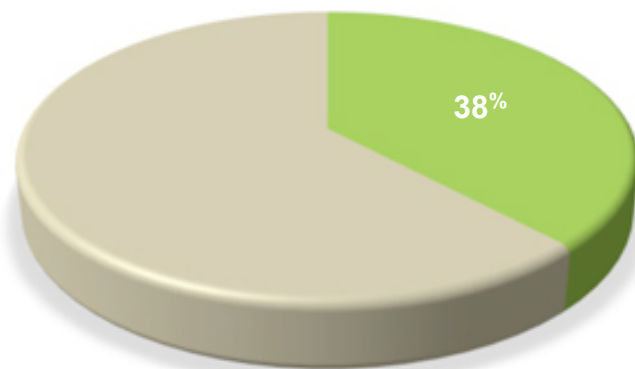
\*Data representative of venues with a national footprint.

Source: JiWire, June 2009.

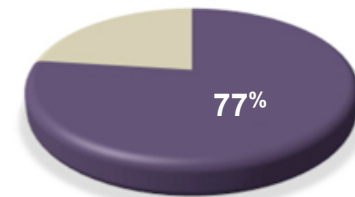
## Wi-Fi Media Channel: Café Consumer Profile

### U.S. Wi-Fi Café Customer Profile: June 2009

**38% Make Purchases from a Website at Café Hotspots**



**77% Plan to Make a Big Ticket Purchase (in the next 12 months)**



- 53% Plan to Travel at Least Twice on a One Week+ Vacation
- 46% Plan to Buy a Smart Phone Device
- 27% Plan to Buy a New Laptop
- 23% Plan to Buy a Vehicle
- 23% Plan to Buy Stocks/Mutual Funds

### Key Insights on U.S. Wi-Fi Café Customers:

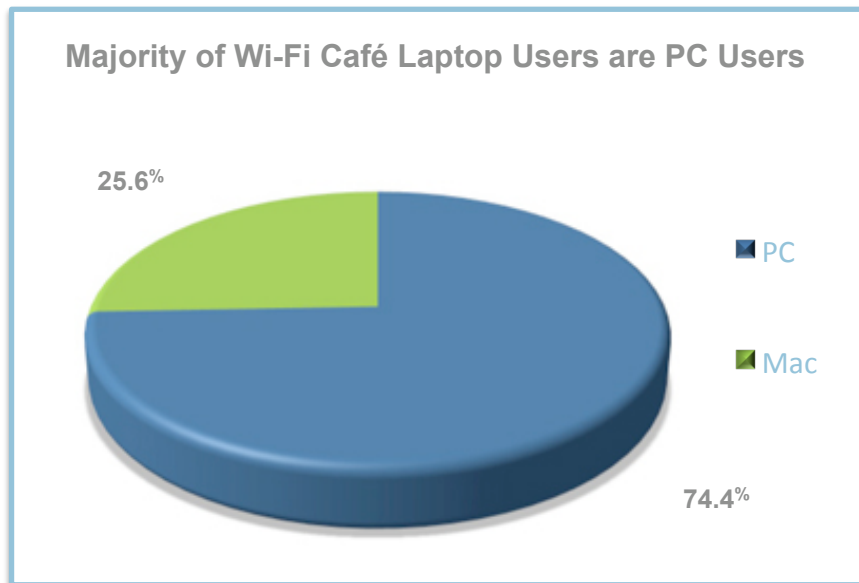
**Of the 38% of Wi-Fi Café customers making purchases:**

- 51% are making a purchase for their personal use only.
- 15% are making a purchase for their business use only.
- 34% are making purchases for both personal and business uses.

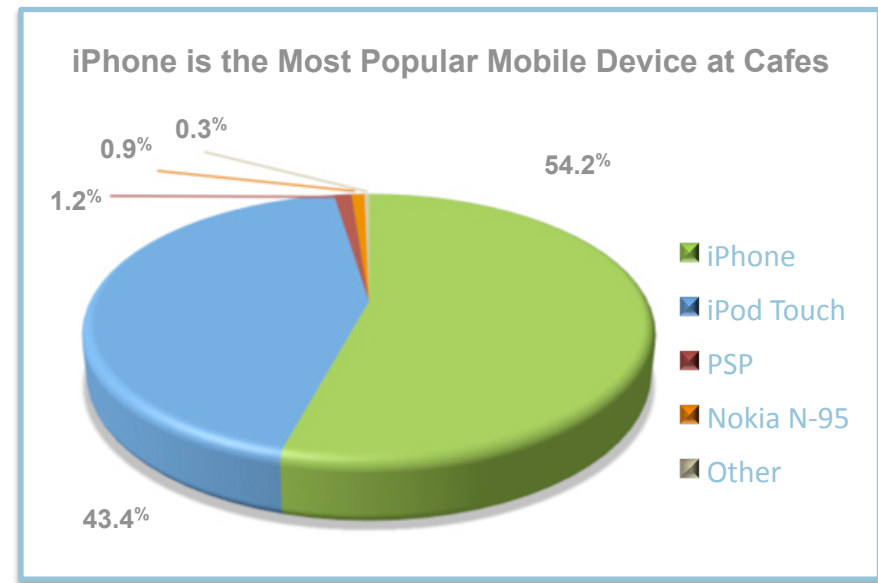


## Wi-Fi Media Channel: Café Device Usage

U.S. Wi-Fi Café Laptop Ad Requests:  
January-June 2009



U.S. Wi-Fi Café Mobile Device Ad Requests:  
January-June 2009



### Key Insights on U.S. Wi-Fi Café Customers:

**Apple Wi-Fi products, both laptops and mobile devices, are popular with Wi-Fi Café customers:**

- 25.6% of Wi-Fi Café users on a laptop are using a Mac; in comparison, Apple has 7.4% of the U.S. market share for laptops (Source: U.S. PC Vendor Unit Shipment Estimates for 1Q09, Gartner, April 2009).
- The iPhone is the most popular Wi-Fi mobile device in cafes, and Apple devices are 97.6% of all mobile devices used in Wi-Fi Cafes.

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please contact us at [Insights@jiwire.com](mailto:Insights@jiwire.com).

### Methodology:

JiWire's first Mobile Audience Insights Report is based on data from approximately 275,000 public Wi-Fi hotspots, as well as surveying 2057 customers randomly selected in over 6,500 café locations across the US that used JiWire's Wi-Fi Media Channel in between April and June 2009. JiWire serves advertisements to over 30,000 public Wi-Fi hotspots in North America and we record data from every ad request. This report is based on the ad request data we collected from January-June 2009.

