Mobile Entertainment: Challenges and Possibilities Consumer Perspectives

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Consumer Perceptions and Practices

To roll out a new consumer technology and/or service, be it GPRS, java games or always-on network connections, is not in itself enough to ensure the success of the mobile entertainment industry. There is an economic imperative not to adopt the 'build-it-and-they-will come' model of technology provision. The availability of a technology to consumers or the integration of a new service (such as WAP) into mobile device does not itself create need or space for consumer use. Increasingly there is evidence of consumers buying new technologies but not routinely using them. This is usually referred to as the '**assimilation gap**'.

Above all consumers currently value the core functionalities of mobiles phones which offer them the means to keep in touch with friends and family: such **practices are profoundly social** and extensions of non-mobile routines. While consumer routines change slower than technologies this does not mean that users will not develop new practices receptive to using their mobiles for entertainment as well as communicative purposes (and the two functions may indeed be combined).

However, there is an urgent need to engage with **consumers as 'experts' in consumption** in order to understand the ways in which mobiles are embedded in their everyday lives as social and technical artefacts. Only then will we understand the **future possible** ways in which mobile entertainment may come to be as popular as mobile communication.

Mobile Entertainment: An Overview of Empirical Findings

Twelve focus groups of consumers in the UK, France, Sweden, Norway and Italy were asked to discuss their perceptions, practices and imaginings concerning current and future mobile entertainment. Key issues emerging included:

- There is concern amongst consumers that 'mobile entertainment services' may negatively impact on the highly valued communicative functions of the mobile. They require reassurances that voice and simple text (SMS) will not be

'interfered' with as a consequence of their usage of newer services such as location-based services or Internet access.

- Following consumer disappointment over WAP the industry must be careful not to over-hype mobile entertainment and raise consumer expectations to levels that cannot be fulfilled by current products, services and cost models.

- Certain groups of consumers, particularly older users, feel excluded from mobile entertainment. They feel that the industry seriously fails to engage with their needs and practices, preferring instead to concentrate on its short term core markets of young people and business users.

- Consumers expressed concern about the social acceptability of some mobile entertainment services particularly when used in public spaces.

Mobile Entertainment: Access and Affordability

Mobile entertainment must be financially viable for a large number of potential customers. While there is a willingness to pay for value-added services such as Multimedia Messaging Services (MMS) **users are highly tactical in the management of their bills**.

- Whilst many young consumers deemed mobile entertainment services to be 'cool' they also expressed the concern that they would be unable to afford them at current pricing levels.

- Whilst consumers express a willingness to pay for mobile entertainment services in the 'abstract' sense, in practical terms they indicated that in the context of their everyday lives they constantly have to make choices about the importance of spending on one service against another (i.e. saving enough credit for voice calls).

> **Choice Quote: UK Group 4**
> Sally: I can't see the symbols. Can you see the symbols?
> Florence: I'm really struggling. I can see that's red
> Sally: Is that red? Oh this is awful isn't it?
> Florence: You can keep this one [handset].

- Consumers indicated that the speed of connection and service was directly related to their willingness to pay (i.e. faster the service, more likely to be willing to pay for it.)

- Access and affordability goes beyond willingness to pay however. Older users indicated that they would be interested in mobile entertainment services if the

mobile device interfaces were better adapted to their needs (such as limited vision or digital mobility.)

Mobile Entertainment: Age and Context Appropriateness

Throughout the focus groups consumers routinely categorised certain products and services to be inappropriate in cultural and moral terms. While there is a general recognition of a spectrum of 'good' and 'bad' content and service there is a danger that **consumers may opt out of all services in an attempt to avoid the bad**.

- In terms of mobile gambling the main concern amongst consumers was that people who were already viewed as vulnerable to a gambling addiction would find themselves in a worse situation if such services were available via mobile devices.

- Whilst for the most part consumers were relatively relaxed about adult services being offered via mobile devices some concern was expressed about:
    1. Protection of minors
    2. The social acceptability of accessing pornographic material in public spaces

- There was little or no mention amongst consumers about exactly who should be responsible for any protection activities.

Choice quote: Swedish Group 2
Mod'tor: How do you protect children from receiving porn on their mobile phones?
Nivva: It's the same as the Internet today
Daniel: I really hope that we'll not have the same development. What if a five year old runs around with a porn movie download to his mobile - that's scary

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Mobile Entertainment: Clarity

Consumers expressed concern about the level of clarity and transparency in mobile entertainment products and services. Often there was significant uncertainty about what exactly users were getting (or not getting) for their money.

- In order for mobile entertainment to become widely successful consumers must be able to understand (and trust) the billing and micro-billing systems.

- Consumers indicated apprehension about not being able to decipher whether they would be billed for a failed or crashed connection to the Mobile Internet.

- Clarity also relates to the transparency of the services that are on offer and the ease with which the consumer is able to differentiate between network operators and their respective services.

- Consumers are not engaged with current debates surrounding interoperability specifications or application programming interfaces (APIs). Issues of clarity are firmly based within consumer's desire to have cross-network transactions, game play and messaging operate seamlessly.

- Clarity of billing systems also relates to phone package personalisation. Consumers were keen to see a variety of mobile entertainment service bundles on offer so that they could choose the one they perceived best suited their needs.

Choice quote: UK Group 5
Ellie: I want to be able to send stuff and use stuff not depending on which operator or phone I have. I hope that the involved companies will put effort in trying to make more compatible solutions

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Mobile Entertainment: Compactness and Coolness

'Cool' is a nebulous term which the mobile industry spends time and money trying to pin down particularly in relation to the youth demographic. Consumers are vocal about the aesthetics of mobile entertainment devices with some phones being regarded as 'cool' and 'funky' or conversely 'too clunky', 'too small', or 'too shiny'.

Choice Quote: Swedish Group 2
Staffan: There are thousands of people who don't care about WAP services - they just want a good-looking small phone

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- In terms of aesthetics, whilst (small) size was equated with 'newness' and desirability, mobiles were often criticised for being *too* small and *too* compact, especially in terms of screen and key size.

- If the mobile entertainment industry is able to enhance **the symbolic 'coolness'** of a technology, application or service then consumers may be prepared to deal with less than perfect functionality. However, consumers are particularly unforgiving if they perceive that style and novelty is interfering with the utility, ease of use and fun aspects of their usage.

Mobile Entertainment: Complexity and Convergence

Consumers discussed what they perceived to be the barriers and drivers of mobile entertainment technologies and services. Frustration when interacting with devices was evident as consumers highlighted what they felt to be the complexity of new mobile entertainment products and services.

- Consumers encountered problems when negotiating the menus on mobile entertainment devices. This is perhaps due to the unfamiliarity of some of the applications and services available but inconsistency and poor design also play a part.

- Ease of use is connected to perceptions of fun. In general use there was an **inverse correlation between complexity and enjoyment** derived from it. Consumers who struggled to use the mobile entertainment devices, particularly in terms of the speed of connection, soon expressed their reservations about how fun such devices and services would be and their commitment to using them.

> **Choice Quote: Swedish Group 1**
> Bjarne: I'm always frustrated that it takes such a long time, it's so badly adapted to the (mobile) telephone's screen, it's a bit of a pain.

Consumers are somewhat reluctant to fully embrace the mobile phone as something more than a voice and text platform although it is possible that this perspective may change as users become more familiar with mobile entertainment and 3G networks and **services which fit with current user practices** are developed.

- Consumers are concerned that 'extras' such as mobile music should not interfere with the mobile's perceived primary use as **a tool to manage social interactions**.

- However, this reluctance to embrace the extras did not extend to new mobile entertainment services which can enhance the perceived primary (communicative) function of the mobile. Accessing e-mail whilst on the move is an appropriate example here.

> **Choice Quote: Finnish Group 1**
> Mod'tor: If you had a gadget like this one, what would you use it for?
> Susanna: Photography, phone calls, and also for reading my e-mails…yeah maybe not web pages otherwise, but it would be OK to check your e-mail through that.

Complexity and convergence in relation to mobile entertainment both relate to consumers' perceptions about the ease of use, perceived usefulness and fun aspects of these new devices. Convergent devices are perceived by some consumers as too complex and more prone to problems.

Mobile Entertainment: Fun and Usefulness

Attention needs to be paid to consumer perspectives on what is **useful** to them throughout the course of their everyday lives (such as services which enable consumers to organise their leisure time) and what may be used simply because it is **fun** (such as mobile games and ringtone downloads).

- Some consumers demonstrated resistance to the reframing of mobile devices as a fun rather than useful device. For these users the mobile was a communication technology (used, for example, for safety if stranded) rather than a leisure technology.

- Where consumers perceived a mobile entertainment service to be relatively easy to use the fun aspect remained vital in its own right. The perception of mobile entertainment technologies, applications and services as being 'fun' heightens the possibility of wholesale acceptance by consumers.

- Without others to swap picture messages with, services such as MMS are unlikely to be perceived as fun. It is the social, communicative and community elements of mobile entertainment services make them enjoyable.

Choice Quote: French Group 1
Anne-Claire: Then I saw there was something, 'draw picture', that sounds fun but it was too hard

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September, 2003

Information Society