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What is this report about?

The focus for this edition of Mintel's Internet Quarterly looks at the usage of legal music and game download services. In particular it explores the challenges that legal download services face to gain greater acceptance in the market, and looks at new innovations that could increase penetration further. It also assesses the effectiveness of proposed government measures to curtail online piracy.



What have we found out?

- Penetration of smartphones will increase quickly in 2010 (currently standing at 12%) as more retailers start to sell the iPhone, pushing down prices. New handset launches from competing mobile manufacturers will also create greater interest in the sector - in particular phones that run Google's 'Android' operating system (which offers a user experience on a par with Apple's handset).
- Social network site usage shows no sign of slowing down: now reaching 49% of UK adults, growth has been driven this quarter by 55-64 year olds.
- In terms of overall web usage habits women are more focused on communication, while for men the web is a tool for entertainment. This is influenced by the fact that men are more likely to own gadgets that require downloaded content to operate.
- The latest quarter saw over mobile web usage increase by 4 percentage points to reach 31%. Usage will continue to increase as smartphones attain greater popularity into 2010. This will be furthered by network initiatives such as Orange Social Life and Vodafone 360.
- Women are more likely to shop online for clothing and footwear (replicating their offline shopping habits). However, it's not just for the young - women aged 35-44 are the most likely to be buying clothes and footwear this way - influenced by the time-saving opportunities such sites offer and the increasingly relevant product ranges, e.g. ASOS moving into children's clothing.
- Despite the increasing range of mainstream download sites, usage of paid-for download sites remains niche. This is partly down to the fact activity is centred on early adopters (the younger) but also due to the poor perceptions of legal downloads, with only 9% of respondents feeling that they offer better quality and greater ease of use compared to unofficial sites.

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