



**Mediamark Research Inc.**

**A Member of the GfK Group**



# Mobile Marketing Consumer Study

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Conducted by: Mediamark Research Inc. (MRI)  
Market Solutions Division  
75 Ninth Avenue, 5th Floor  
New York, NY 10011

Sponsored by: Zoove Corp.  
2200 Geng Road, Suite 230  
Palo Alto, CA 94303

# MOBILE MARKETING CONSUMER STUDY

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# INTRODUCTION

Zoove Corp. is a technology company that gives consumer brands and media properties the opportunity to deliver information to consumers using a variety of mobile data technologies. In the Spring of 2006, Zoove engaged the Market Solutions Division of Mediamark Research Inc. (MRI), to conduct a mall intercept study among mobile phone users.

MPG, the global media buying and planning network of worldwide marketing communications group Havas, and its clients Outback Steakhouse, Royal Caribbean Cruise Lines and Volvo, partnered with Zoove in the study. CBS Television participated through the inclusion of the primetime program CSI.

## Abbreviated Call

An abbreviated call is essentially a programming shortcut that allows you to dial a 10-digit number using fewer keystrokes. Programming a handset to dial a frequently accessed number using a single digit instead of the full number is one example of an abbreviated call. Some common abbreviated call codes include \*76 to forward a call and \*69 to check the last number that dialed your handset.

## Common Short Code (CSC) & Short Message Service (SMS)

Short Codes are phone numbers that are 5 digits long, but have the functionality of normal 10-digit numbers. Short Message Service (SMS) is a system that exploits underutilized bandwidth to send short bursts of text based messages (up to 160 text characters) from wireless handsets.

Common Short Code (CSC), 5 digit short codes that are compatible across all participating carriers, is used to deliver Short Message Service (SMS) communications (e.g., "text CAR to 10958").

## StarStar Call Service

A StarStar call is placed by dialing the \* button on the handset twice, then dialing a unique code associated with the advertiser and pressing the send button (e.g., \*\*Volvo or \*\*86586, then send) to receive multimedia, text, wireless application protocol (WAP) or email communication from the advertiser. The main purpose of the study is to evaluate consumer response to two mobile marketing techniques: SMS Short Code texting and Zoove's new StarStar call system.

# METHODOLOGY

## Sample

MRI has conducted over 600 interviews, evenly divided between men and women, and representative of an age distribution within eighteen (18) malls in the markets: Phoenix, AZ; Carlsbad, CA; Downey, CA; San Rafael, CA; Littleton, CO; Tallahassee, FL; Douglasville, GA; Baltimore, MD; Springfield, MA; Troy, MI; Jackson, MS; St. Peters, MO; White Plains, NY; Memphis, TN; Arlington, TX; San Antonio, TX; Puyallup, WA; and Appleton, WI.

## Respondent Selection

Respondents were randomly selected, via intercept, within 18 malls. To qualify for the interview, each respondent had to be 18 years or older, have a mobile phone with them and have an email address. The carrier of the mobile phone in their possession had to be Cingular, AT&T, Sprint, Nextel, T-Mobile or Verizon.

## Questionnaire

A thirty-minute interview was employed which included:

- Tasks to be performed by respondent on their mobile phone and on a new mobile phone provided to them
- Lifestyle questions
- Demographic questions

## Data Collection

78% of completed interviews took between 30 to 44 minutes. The mean time was 32.7 minutes; the median was 30.9.

The study was conducted at 18 malls from March 24 – 27, 2006. Approximately 33 to 34 interviews were conducted in each market. The in-tab results of the interviewing were as follows:

<b>Total Qualified Sample:</b>	<b>613</b>
Total Males	329
Total Females	284
Total age 18 – 24	57
Total age 25 – 34	108
Total age 35 – 44	127
Total age 45 – 54	116
Total age 55 – 64	96
Total age 65+	109

The tabular findings of the study are contained in this report together with a sample of the questionnaire used for this study.

#### Data Processing

All questionnaires were processed employing standard market research editing, coding and tabulating procedures.

Means were computed using the actual values reported by respondents in open-ended questions and the midpoint of values in closed-ended questions. For the bottom range the midpoint was used (e.g., less than 10 = 5); for the top range the lower limit of the range was used (e.g., 50 or more = 50).

Medians were computed using a summation process to reach the value at which 50% of the responses were higher and 50% of the responses were lower. With grouped data, the median value was calculated by taking the required proportion of the range within which the median value (50%) fell.

Under conventional assumptions, the sampling tolerances for full-sample statistics in this report are plus or minus 4% to 5%.

## EXECUTIVE SUMMARY

This study has found that mobile phone users find StarStar calling to be a simpler, easier tool than SMS text-to-number Short Codes. Participants clearly prefer the StarStar calling technique, and look forward to using the Zoove product.

### *Usage Highlights*

Working with their personal mobile phones, respondents were asked to respond to print, radio and television advertising promotion requests using SMS short codes. The task is challenging for mobile phone users, requiring consumers to remember a numeric string “on the fly”. Even with advance knowledge, fewer than half of respondents could successfully complete the SMS short code task using their own phone.

Overall, 47.0% were able to do so, with print enjoying the most success (45.2%) and radio the least (42.1%). Given the complexity of the task, it’s not surprising that the print ads enjoy the highest success rate – print provides a handy, permanent reference. The television promotions, with both audio and visual cues, do nearly as well as print (44.7%).

In order to test the StarStar call technology, respondents were given a new mobile phone enabled with the Zoove service. After being familiarized with the phone, respondents were asked to respond to a series of print, radio and television promotions using the StarStar protocol.

90.8% of participants, using a new mobile phone to test a new function, successfully responded using the StarStar call number – nearly double the incidence of the SMS text-to-number task completion.

As with the SMS short code task, print and television enjoyed the highest success rate – with one exception. The CSI television promotion ran as video only, with no voice-over narration. Respondents were told, in advance, that there would not be a voice telling them how to respond. The CSI promotion experienced a lower incidence of completion, in line with results seen for the radio ads.

Print - Volvo Ad (Call **867)	87.3%
TV - Royal Caribbean (Call **465)	86.4%
TV - Royal Caribbean (Call **Ship)	85.6%
TV - Volvo Ad (Call **Volvo)	85.5%
TV - Outback Steakhouse Ad (Call **Out)	85.4%
Print - Volvo Ad (Call **Volvo)	85.1%
TV - CSI/CBS Promotion (Call **CSI)	82.8%
Radio - Outback Steakhouse Ad (Call **332)	82.2%
Radio - Outback Steakhouse Ad (Call **Out)	81.2%

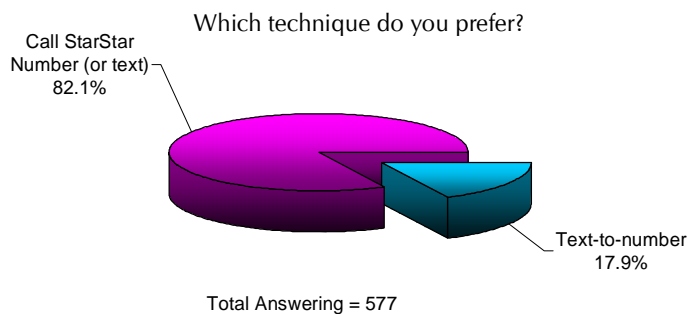
## Qualitative Highlights

82.1% of participants prefer the StarStar protocol. Respondents who prefer the StarStar technique are, on the average, 4 years older than respondents who prefer the SMS text-to-number technique (47.2 vs. 43.2 years).

Younger consumers are likely to be more familiar with the functionality of their mobile phone, and what is familiar tends to be preferred.

Even so, the StarStar technique is preferred by 77.8% of respondents who do know how to text (and among 78.5% who don't).

Even participants who are competent with SMS Short Code aren't thrilled about it. Among the people who can SMS Short Code, 84.5% believe SMS Short Codes either take too long to do, are a hassle, the SMS Short Code responses in the ads are too hard to remember or they have little interest for the offers they see using SMS Short Codes as a mobile response.



## *Zoove Highlights*

Respondents reacted positively to the description of the Zoove offering. More than half would use the Zoove service once a week or more: 21.6% would use the Zoove service everyday, 30.6% weekly. Women are particularly keen to use the Zoove service– 24.3% say they would use it daily.

Privacy does not appear to be a concern – 75.8% would provide email and 81.0% would provide zip code data in order to receive information, offers and coupons of interest. Specific product information (79.1%), free entertainment offers (78.8%), discount coupons (75.0%), and local restaurant/retailer/dealer address information (75.7%) are of great interest to potential users.

With zip-to-area code matching, local information can be sent to StarStar call users. Respondent zip code/area code replies were compared with three zipcode/areacode databases<sup>1</sup>. Where there was agreement between the respondent information and the information in any of the databases it was considered a "match." If there was no agreement with any of the databases it did not match.

This procedure shows that 84% of respondents report zip codes and wireless area codes that agree.

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<sup>1</sup> Databases used:

<http://www.zip-codes.com/>

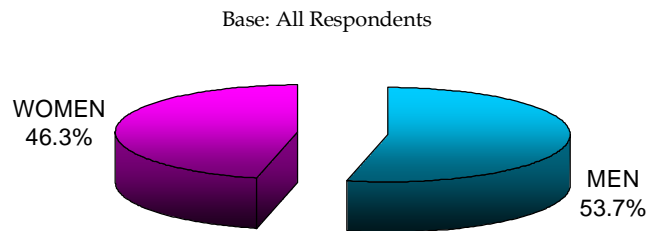
<http://www.zipinfo.com/search/zipcode.htm>

<http://www.jcsm.com/scripts/areacode.asp>

# DEMOGRAPHICS

## Q1A. Gender

The study sample was composed of 613 adults, with a slightly higher proportion of men than women participating.



The average age of survey participants is 46.9 years.

Q1B. Age			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	613	329	284
18-24	9.3%	10.9%	7.4%
25-34	17.6%	16.7%	18.7%
35-44	20.7%	21.3%	20.1%
45-54	18.9%	17.6%	20.4%
55-64	15.7%	15.8%	15.5%
65 or older	17.8%	17.6%	18.0%
Median	46.2	45.6	46.9
Mean	46.9	46.5	47.3

More than half of all respondents have attended or graduated college. A slightly higher proportion of women (62.1%) than men (53.5%) are collegians.

Q1. What is the highest level of education you have completed or the highest degree you have received?			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	609	327	282
Any college	57.5%	53.5%	62.1%
Graduated from college or more	24.6%	21.1%	28.7%
Post-graduate study with degree	6.4%	6.7%	6.0%
Graduated from 4-year college	18.2%	14.4%	22.7%
Attended college but did not graduate	32.8%	32.4%	33.3%
Graduated high school or received equivalent degree (e.g., GED)	36.1%	38.5%	33.3%
Less than high school graduate	6.4%	8.0%	4.6%

Presence of children is higher among the women – 34.8% of women as compared with 25.7% of men have children under the age of 17 at home.

Q2. Do you have any children age 17 or younger currently living in your household?			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	609	327	282
Yes	29.9%	25.7%	34.8%
No	70.1%	74.3%	65.2%

Reflecting the maturity of the sample, respondents are most likely to have older children currently at home.

Q3. How many children in each of the following age groups are currently living in your household?			
<i>Base: Have children age 17 or younger currently living in household</i>	Adults	Men	Women
Total Answering	182	84	98
12-17 years old	51.6%	60.7%	43.9%
6-11 years old	44.5%	39.3%	49.0%
3-5 years old	21.4%	17.9%	24.5%
2 years old or younger	24.2%	21.4%	26.5%

Total may add to more than 100% due to multiple responses.

Respondents that have children have an average of 1.8 kids currently at home.

Q3. How many children...are currently living in your household?			
<i>Base: Have children age 17 or younger currently living in household</i>	Adults	Men	Women
Total Answering	182	84	98
1	46.2%	42.9%	49.0%
2	35.7%	36.9%	34.7%
3	15.4%	15.5%	15.3%
4 or more	2.7%	4.8%	1.0%
Median	2.1	2.2	2.0
Mean	1.8	1.9	1.7

## Zip Code – Area Code Agreement

Respondents were asked for both their zip codes and mobile phone area codes on the questionnaires.

If the zip code was provided and was a legitimate, USPS recognized zip code, then the respondent zip code/area code replies were compared with 3 zipcode/areacode databases<sup>2</sup>. Where there was agreement between the respondent information and the information in any of the databases it was considered a "match." If there was no agreement with any of the databases it did not match.

This procedure shows that 84% of respondents report zip codes and wireless area codes that agree.

Zip code data were used to derive the geographic distribution of the study population.

QS. Census region			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	608	324	284
Northeast	10.7%	10.5%	10.9%
North Central	16.3%	16.7%	15.8%
South	39.1%	38.0%	40.5%
West	33.9%	34.9%	32.7%

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<sup>2</sup> Databases used:

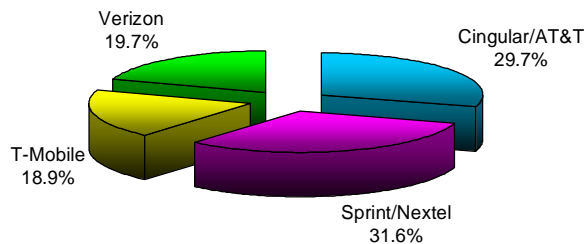
<http://www.zip-codes.com/>

<http://www.zipinfo.com/search/zipcode.htm>

<http://www.jcsm.com/scripts/areacode.asp>

# MOBILE PHONE USE

All survey participants currently have a plan with one of the four major wireless providers: Cingular/AT&T, Sprint/Nextel, T-Mobile or Verizon.



Sprint/Nextel has the highest market share, closely followed by Cingular/AT&T. Cingular/AT&T has an edge with the women while Sprint/Nextel is tops among men.

QD. Which cell phone carrier do you currently have a plan with for the cell phone you have now?			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	613	329	284
Cingular/AT&T	29.7%	27.4%	32.4%
Sprint/Nextel	31.6%	33.1%	29.9%
T-Mobile	18.9%	19.5%	18.3%
Verizon	19.7%	20.1%	19.4%

More than half of respondents have previously called an abbreviated number to check on their minutes used...

Q1. Have you ever called an abbreviated call number to find out how many minutes were left on your monthly plan?			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	609	327	282
Yes	57.3%	55.7%	59.2%
No	41.9%	43.1%	40.4%
Don't Know /Not Sure	0.8%	1.2%	0.4%

...and over 80% were able to do so when asked to by the interviewer.

Q2. Please call this number to get your remaining monthly minutes from your existing carrier plan.			
<i>Base: Have Plan With Cingular/AT&amp;T, Sprint/Nextel, T-Mobile or Verizon</i>	Adults	Men	Women
Total Answering	611	329	282
Yes (audio/text message received)	81.8%	83.9%	79.4%
No (audio/text message did not go through)	11.6%	10.3%	13.1%
Respondent stated does not know how to receive text messages – did not attempt	6.5%	5.8%	7.4%

Respondents had a little more difficulty with texting. Using their personal mobile phone, slightly over half were able to successfully send a text message to the interviewer, while fully one-third did not know how to complete the task.

Q3. Please send [interviewer] a text message "hello".			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	612	329	283
Yes (successfully sent/received text message)	54.6%	54.1%	55.1%
No (unsuccessfully sent/received text message)	10.5%	11.2%	9.5%
Respondent stated does not know how to send text messages – did not attempt	35.0%	34.7%	35.3%

Receiving was less problematic – 70% of men and 74% of women successfully opened and read a text message sent by the interviewer.

Q4. Now, [interviewer will] send you a text message to your phone. Please open the text message and read to me what the text message shows.			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	613	329	284
Yes (successfully viewed text message)	71.8%	69.9%	73.9%
No (unsuccessfully viewed text message)	9.0%	10.6%	7.0%
Respondent stated does not know how to receive text messages – did not attempt	19.2%	19.5%	19.0%

# MOBILE MARKETING TEST

## *Using SMS Short Codes*

Respondents were exposed to a series of radio, television and print ads, and asked to respond to the promotions using their own mobile phones.

Slightly fewer than half of respondents successfully responded to the SMS Short Code prompts. The incidence of respondents who were unsuccessful or unable to perform the task did not vary across promotions.

The incidence of success did vary by medium. The print ad, which permitted the respondent to reference the promotion code at leisure, had the highest success rate. This was closely followed by the television promotion, which provided audio and visual cues – while the ad ran. The radio promotion, with no visual reference point, had the lowest incidence of success.

Q5-7. [Interviewer] will play and show you some advertisements. Please listen to or watch each ad and...respond to [the] promotion request using your cell phone.

<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	613	329	284
Qs.5-7, Respondent's Cell Phone, Short Code Ad (Net <sup>3</sup> )	<b>47.0%</b>	<b>46.2%</b>	<b>47.9%</b>
Radio - Outback Steakhouse Short Code Ad (Text "Steak" To 10958)	42.1%	41.3%	43.0%
TV - Royal Caribbean Short Code Ad (Text "Ship" To 10958)	44.7%	44.1%	45.4%
Print - Volvo Short Code Ad (Text "Car" To 10958)	45.2%	44.4%	46.1%

<sup>3</sup> **Net** refers to total **unduplicated** response. Let's say 10 people are asked about what fruit they like. 3 people select apples, the same 3 also like bananas, and 3 different people select mangos. Each fruit has a 30% response rate (3/10) but the **net** percentage of people who like fruit is 60% (6/10).

## Attitudes towards SMS Short Codes

Respondents clearly find the process of using SMS Short Codes to be cumbersome. Overall, 84.5% of respondents who were able to complete the task of receiving an advertiser text message agreed that *text a word to a number* promotions are either too long, a hassle, hard to respond to or of little personal interest.

Q6. At the beginning you looked at advertisements that included text a word message ... Please tell us of you agree or disagree with the following statements:			
<i>Base: Respondent successfully received text message from Outback Steakhouse, Royal Caribbean or Volvo short code ad</i>	Adults	Men	Women
Total Respondents	288	152	136
<b>Agreed with any of these statements (net)</b>	<b>84.5%</b>	<b>81.9%</b>	<b>87.2%</b>
(1) Text a word message to a number promotions or ads, like <i>text "steak" to 10958</i> takes too long to do on my phone	70.0%	68.1%	72.2%
(2) Responding in this method, text a word message to a number promotions or ads, like <i>text "steak" to 10958</i> is a hassle	65.0%	61.8%	68.4%
(3) With these types of promotions or ads, I often forget the number or word in the promotion because the ads go by so quickly and I cannot respond fast enough with my phone	70.3%	67.1%	73.7%
(4) I have little interest in most promotions or ads I have seen using text a word message to a number	69.3%	68.1%	70.7%

Total may add to more than 100% due to multiple responses.

## Using StarStar Call Codes

Respondents were given a new mobile phone enabled with the StarStar call service. Respondents were instructed to familiarize themselves with the look and layout of the new phone. Only after respondents reported feeling comfortable with using the new phone did the interview proceed.

Respondents were exposed to a series of radio, television and print ads, and asked to respond to the promotions using the new mobile phone.

Two versions of StarStar call codes were tested: StarStar Text (e.g., “Call \*\*VOLVO) and StarStar Number (e.g., “Call \*\*332).

90.8% of respondents successfully responded to the ads when instructed to use the StarStar call service—nearly double the incidence of SMS short code completion. No substantive difference between the text and numeric versions is noted.

Q8-16. [Interviewer] will play and show you some additional advertisements...please respond using this [new] cell phone. (Summary)			
Base: All Respondents	Adults	Men	Women
Total Answering	613	329	284
Qs.8-16, New Cell Phone, StarStar Number/Text (Net) <sup>4</sup>	90.8%	89.0%	93.0%
Qs.8-10, New Cell Phone, StarStar Number (Subnet)	89.1%	87.5%	90.8%
Qs.11-16, New Cell Phone, StarStar Text (Subnet)	88.6%	86.6%	90.8%

<sup>4</sup> **Net** refers to total **unduplicated** response. Let’s say 10 people are asked about what fruit they like. 3 people select apples, the same 3 also like bananas, and 3 different people select mangos. Each fruit has a 30% response rate (3/10) but the **net** percentage of people who like fruit is 60% (6/10).

Print supplies an edge here as well – the print promotions have a higher incidence of success than either the television or the radio.

The television promotions, which provide a visual cue as well as a voice-over instruction, are nearly as successful as the print promotions.

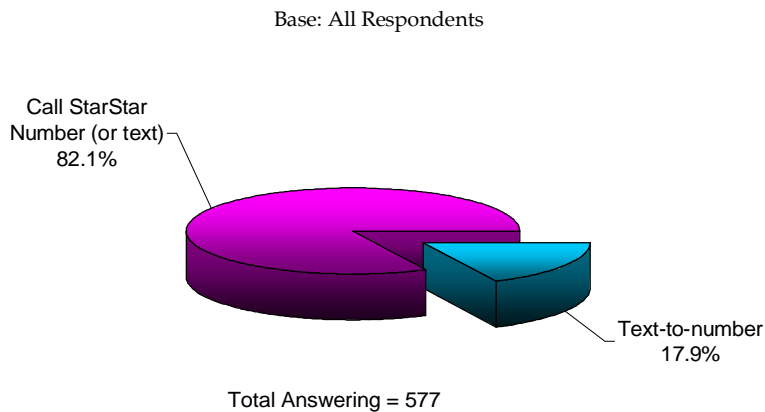
However, the CSI promotion contained no voice instruction, just a visual cue. Even though respondents were told before viewing the CSI ad that there wouldn't be a man's voice at the end, the success rate dipped. Having both audio and visual cues in the television ad bolsters the success rate.

Q8-16. [Interviewer] will play and show you some additional advertisements...please respond using this [new] cell phone. (Detail)			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	613	329	284
Radio - Outback Steakhouse Ad (Call **332)	82.2%	79.6%	85.2%
TV - Royal Caribbean (Call **465)	86.4%	85.4%	87.7%
Print - Volvo Ad (Call **867)	87.3%	86.6%	88.0%
Radio - Outback Steakhouse Ad (Call **Out)	81.2%	79.6%	83.0%
TV - Royal Caribbean (Call **Ship)	85.6%	83.2%	88.4%
Print - Volvo Ad (Call **Volvo)	85.1%	82.6%	88.0%
TV - Outback Steakhouse Ad (Call **Out)	85.4%	82.6%	88.7%
TV - Volvo Ad (Call **Volvo)	85.5%	82.9%	88.4%
TV - CSI/CBS Promotion (Call **CSI)	82.8%	80.1%	85.9%

# QUALITATIVE RESPONSES

After completing all tasks, the interviewer reviewed the mobile phone response techniques (“text to number” and the “StarStar call”) with respondents.

Q1. Which technique do you prefer?



Respondents overwhelmingly prefer the StarStar call system.

No differences by gender are noted, but there is a noticeable age effect – respondents who prefer the StarStar technique are, on the average, 4 years older than respondents who prefer the SMS texting routine (47.2 vs. 43.2 years).

This is probably not so much age-driven as familiarity-driven; younger consumers tend to be more familiar with the functionality of their mobile phones, and what is familiar is likely to be preferred.

Among all respondents who prefer the StarStar approach, 35.4% do not know how to send text messages.

Even so, 77.8% of respondents who do know how to text (and 78.5% who don't) prefer the StarStar call technique.

After the preference question was asked, respondents were handed a description of the Zoove service:

“You have been experiencing a new mobile phone product from a company named Zoove. It is a **star star mobile phone call** that allows you to get free information and entertainment on the go from anywhere.

Zoove allows you to gather information and entertainment from your mobile phone, which can be sent back to your mobile phone or to your personal computer through an email.

Zoove is a free service, it does not cost you anything to join or to use.

Zoove always protects your privacy. Zoove will never share personal information with any company or person; this privacy protection includes protecting your name, address, phone number and email address and all other aspects of your usage from the Zoove service.

You will never receive spam or phone calls from telemarketers from using the star star phone service from Zoove.

Upon your request only, Zoove will send you product and service information, recipes, discount coupons and special offers, free music, free movie clips, free ringtones, and much more. You can also enter television promotions by voting for the game’s MVP (Call \*\*MVP 1) or for your favorite star on American Idol . Zoove can also instantly reserve seats for you to your favorite sporting or entertainment event. Zoove will add convenience and save you time and effort as you live your active lifestyle.

Zoove will offer national and local information and services for you to enjoy, just call the star star phone number whenever you hear or see something you want and you will receive it instantly on your phone and it will be sent to your email address to open at your convenience.”

After reading this description, respondents were asked a series of questions about the Zoove service.

Respondents are eager to incorporate StarStar call functionality into their lives. More than half would use the Zoove service once a week or more, and nearly 25% of women say they would use the service on a daily basis.

Q2. How often, on average, would you use the Zoove service?			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	612	328	284
Everyday	21.6%	19.2%	24.3%
Weekly	30.6%	32.9%	27.8%
A few times a month	19.0%	18.9%	19.0%
Once a month	7.5%	6.7%	8.5%
A few times a year	6.0%	7.0%	4.9%
Seldom	10.1%	10.4%	9.9%
Never	5.2%	4.9%	5.6%

Assured of confidentiality, respondents are largely unconcerned about sharing email and zip code information with Zoove.

Q3. Would you provide your email address to Zoove, if you could be guaranteed complete privacy, no spam ever and you would only receive exactly what you requested?			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	612	328	284
Yes	75.8%	74.4%	77.5%
No	21.4%	22.9%	19.7%
Don't Know/Not Sure	2.8%	2.7%	2.8%

Q4. Would you provide your zip code to Zoove in order for you to receive local information you are interested in, if you could be guaranteed complete privacy, no spam ever and you would only receive exactly what you requested?			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Answering	612	328	284
Yes	81.0%	81.7%	80.3%
No	17.2%	16.8%	17.6%
Don't Know/Not Sure	1.8%	1.5%	2.1%

Product information, free entertainment offers and discount coupons are of most interest, but all potential uses are embraced by most respondents.

Q5. Which of the following would you likely use the Zoove StarStar call service for?			
<i>Base: All Respondents</i>	Adults	Men	Women
Total Respondents	613	329	284
Specific products you are interested in learning more about	79.1%	77.8%	80.6%
Discount coupons on products you normally purchase	75.0%	72.0%	78.5%
Special offers on products or services (discounts on travel, etc.)	71.9%	70.5%	73.6%
Free entertainment offers	78.8%	79.9%	77.5%
Advance ticket reservations	69.4%	69.8%	68.9%
Television promotions (vote for sports star/American Idol, etc.)	50.7%	48.5%	53.2%
Locate local restaurant/retailer/dealer address	75.7%	75.4%	76.1%

Total may add to more than 100% due to multiple responses



## Contact:

Zoove Corp.

2200 Geng Road, Suite 230

Palo Alto, CA 94303

Phone: 650-798-2700

Fax: 650-424-0452

[www.Zoove.com](http://www.Zoove.com)