

Mobile Data Usage and Users

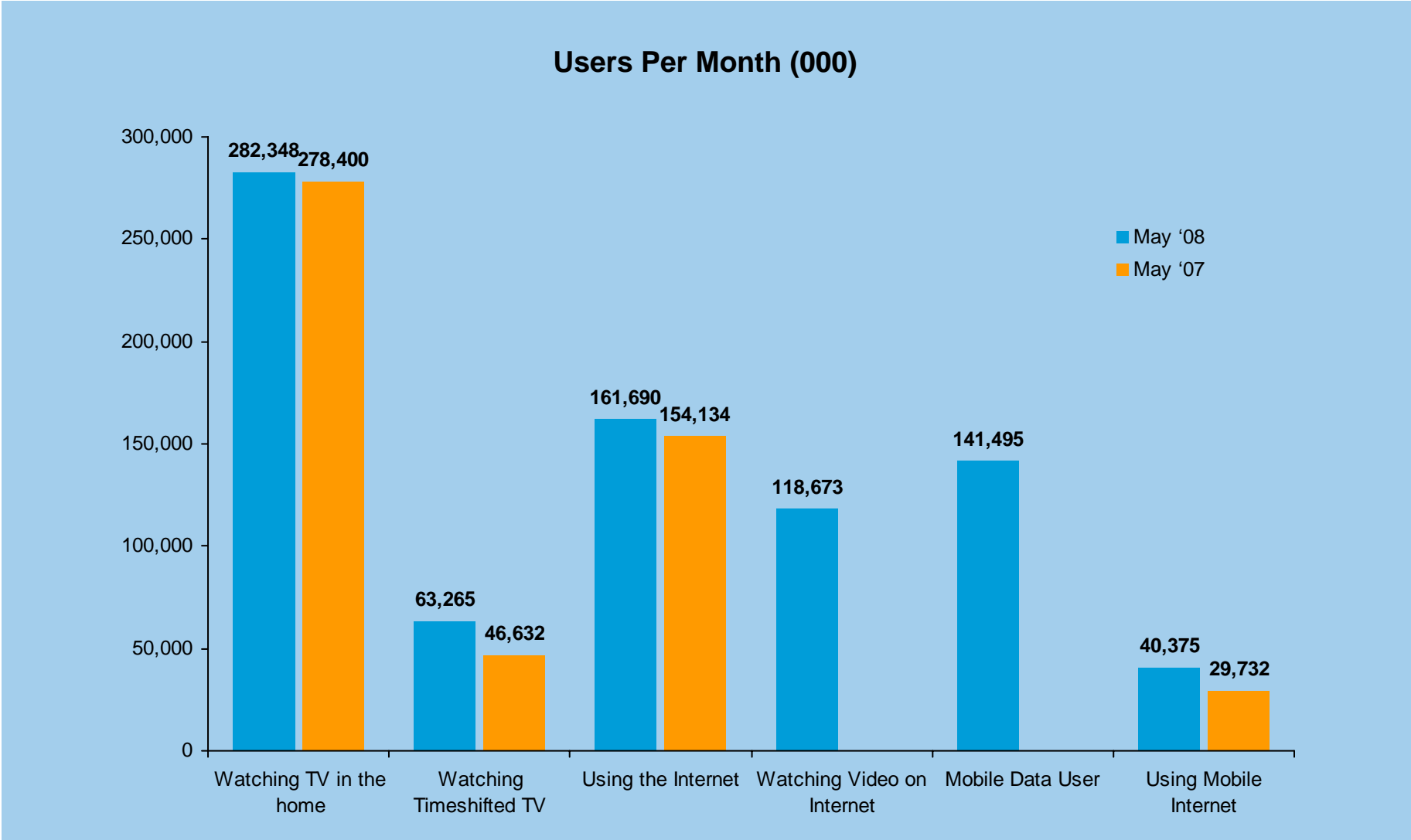
Future Opportunities in Mobile Entertainment

November 2008



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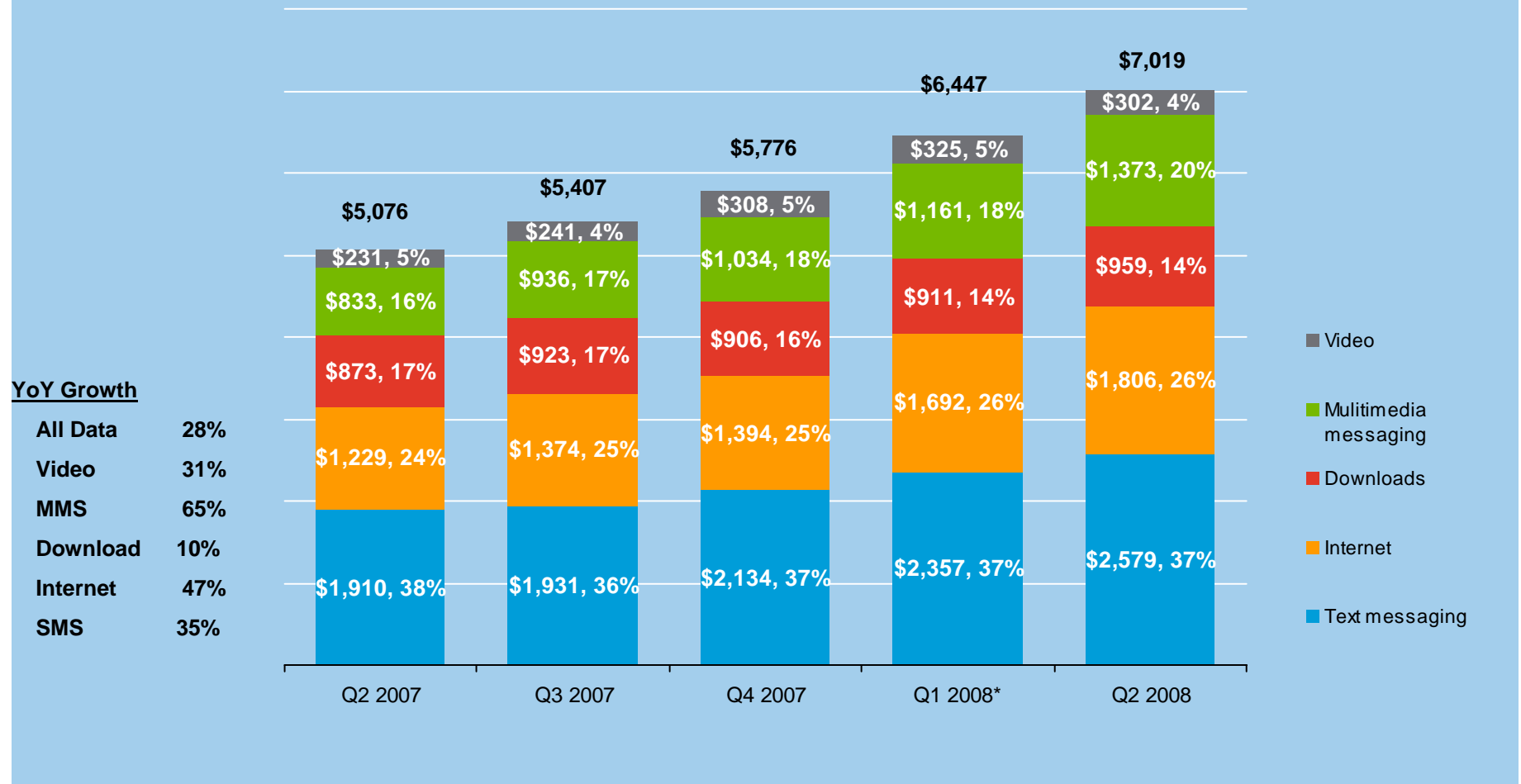
Mobile Media in perspective - The audiences beyond TV are significant



The mobile content business is growing steadily – \$30 Billion dollars annually

Mobile Content Revenues (in millions)

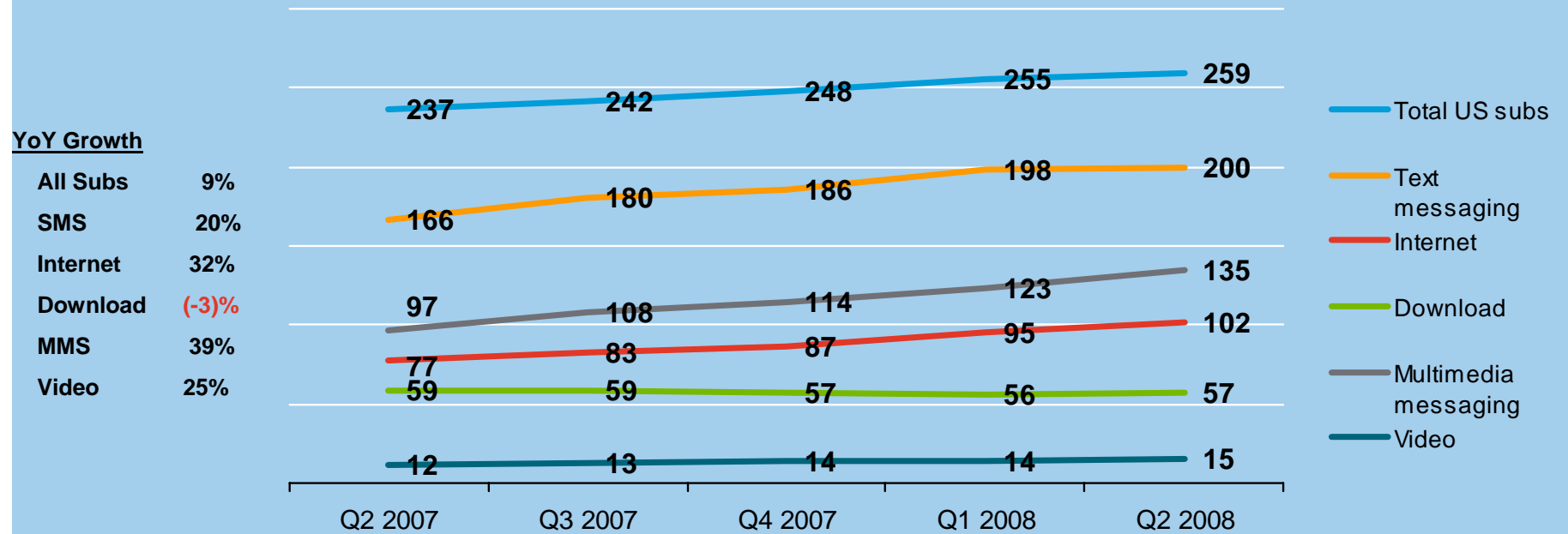
Q2 2007–Q2 2008, National



The number of wireless subscribers paying for mobile content continues to grow, but Download penetration is stagnant

Mobile Content Subscribers (in millions)

Q2 2007– Q2 2008, National



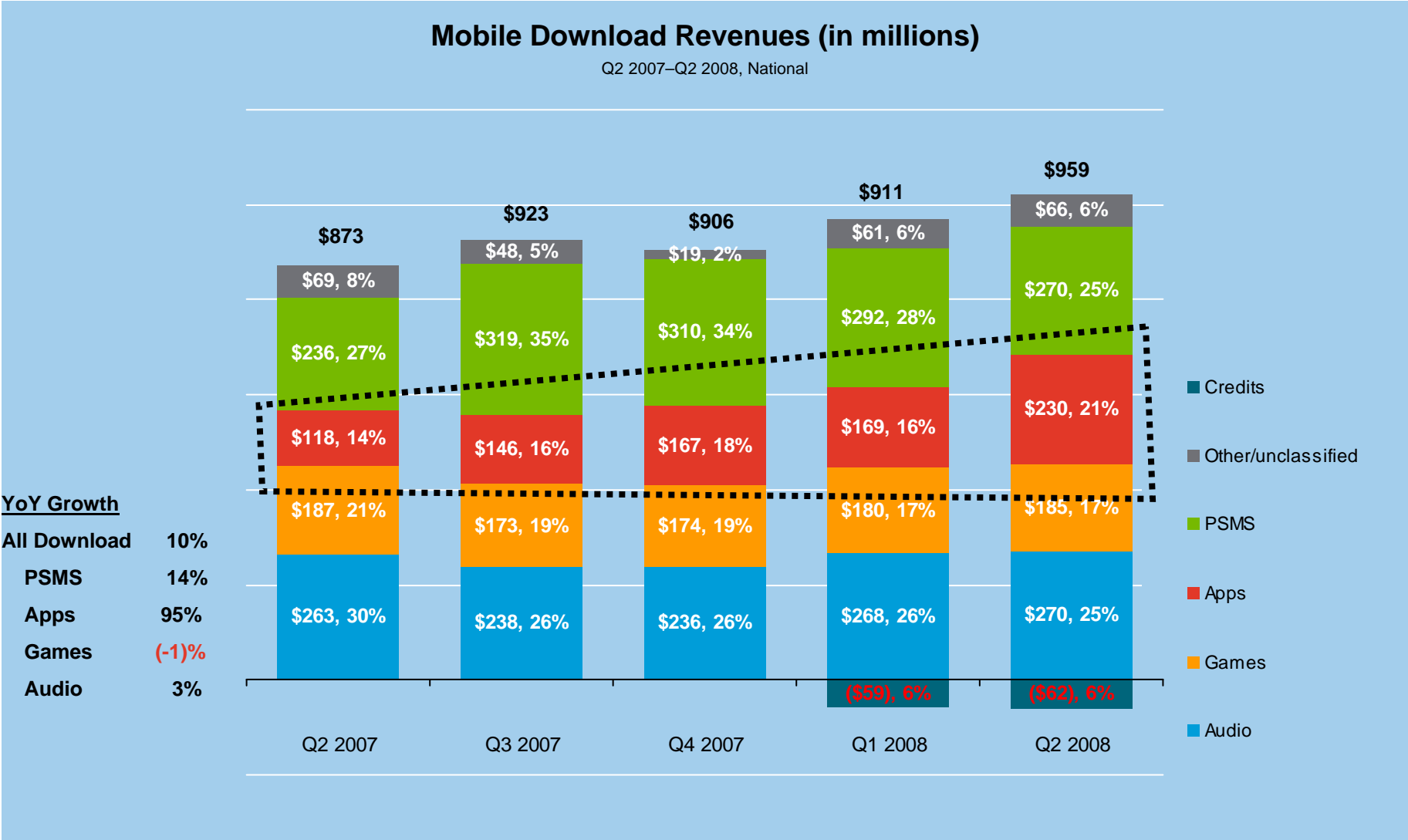
YoY Growth

All Subs	9%
SMS	20%
Internet	32%
Download	(-3)%
MMS	39%
Video	25%

Penetration of US Wireless Subscribers

Period	Q2 2007	Q3 2007	Q4 2007	Q1 2008*	Q2 2008
SMS	70%	74%	77%	78%	77%
Internet	33%	34%	36%	37%	39%
MMS	41%	45%	47%	48%	52%
Downloads	25%	24%	24%	22%	22%
Video	5%	5%	6%	5%	6%

Download Revenue has grown on the back of Applications



*Audio include purchases of Ringback Subscription Charges

Note: Includes prepaid, postpaid, and all carriers. Does not include off-bill.

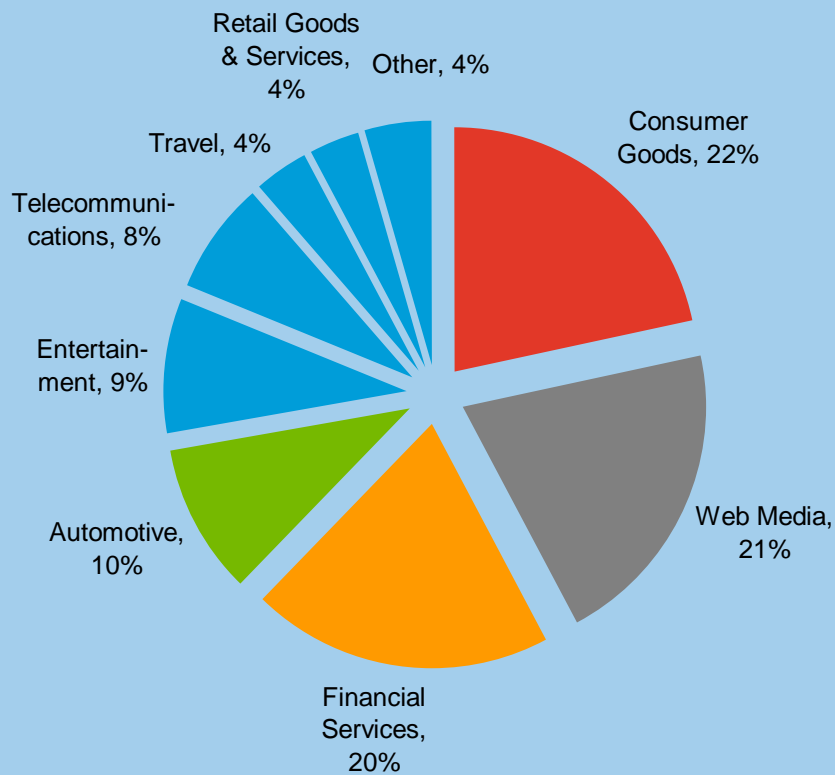
Source: Mobile Media Measurement bill panel and survey analysis. Extrapolation from CTIA and Nielsen Mobile universe estimates.

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The Ad-supported model is showing signs of maturity – 150+ advertisers across the Mobile Web

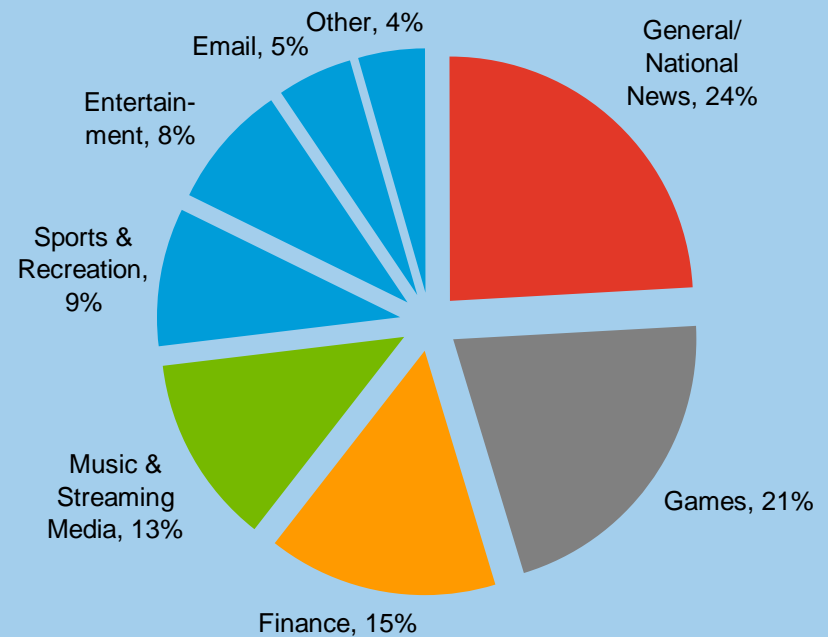
Share of Estimated Impressions by Advertiser Category

July 2008

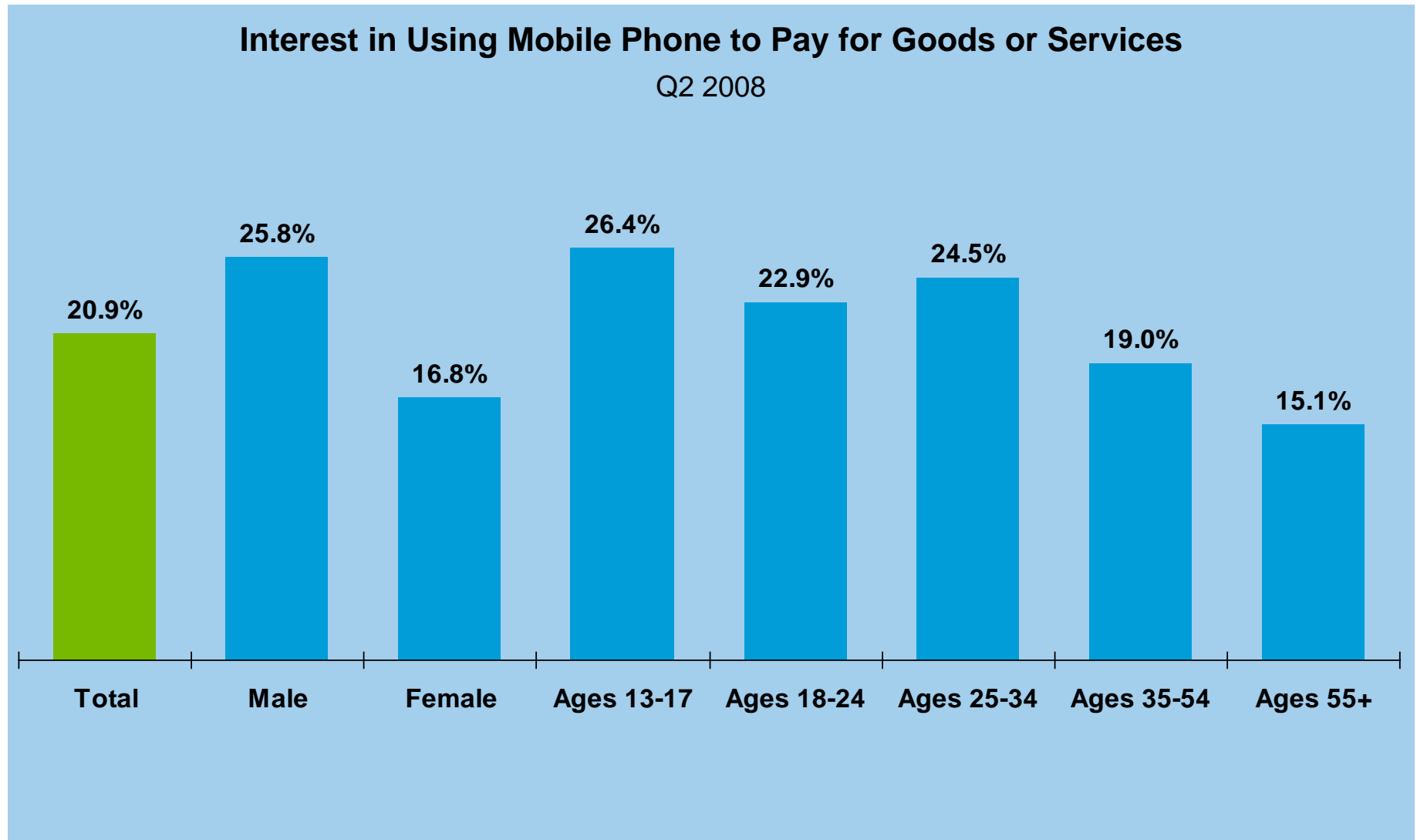


Share of Estimated Impressions by Publisher Genre

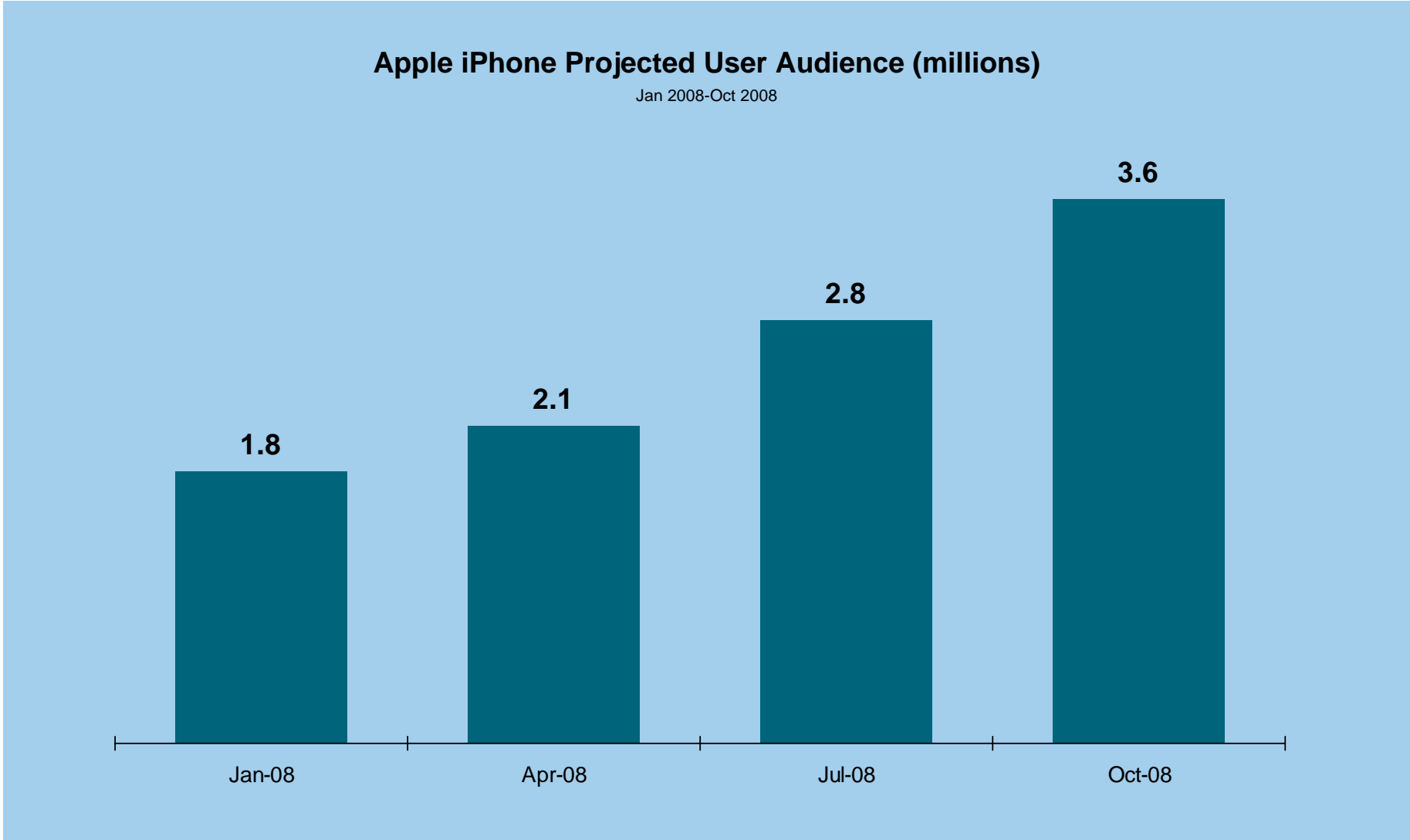
July 2008



Interest in Mobile Commerce is healthy



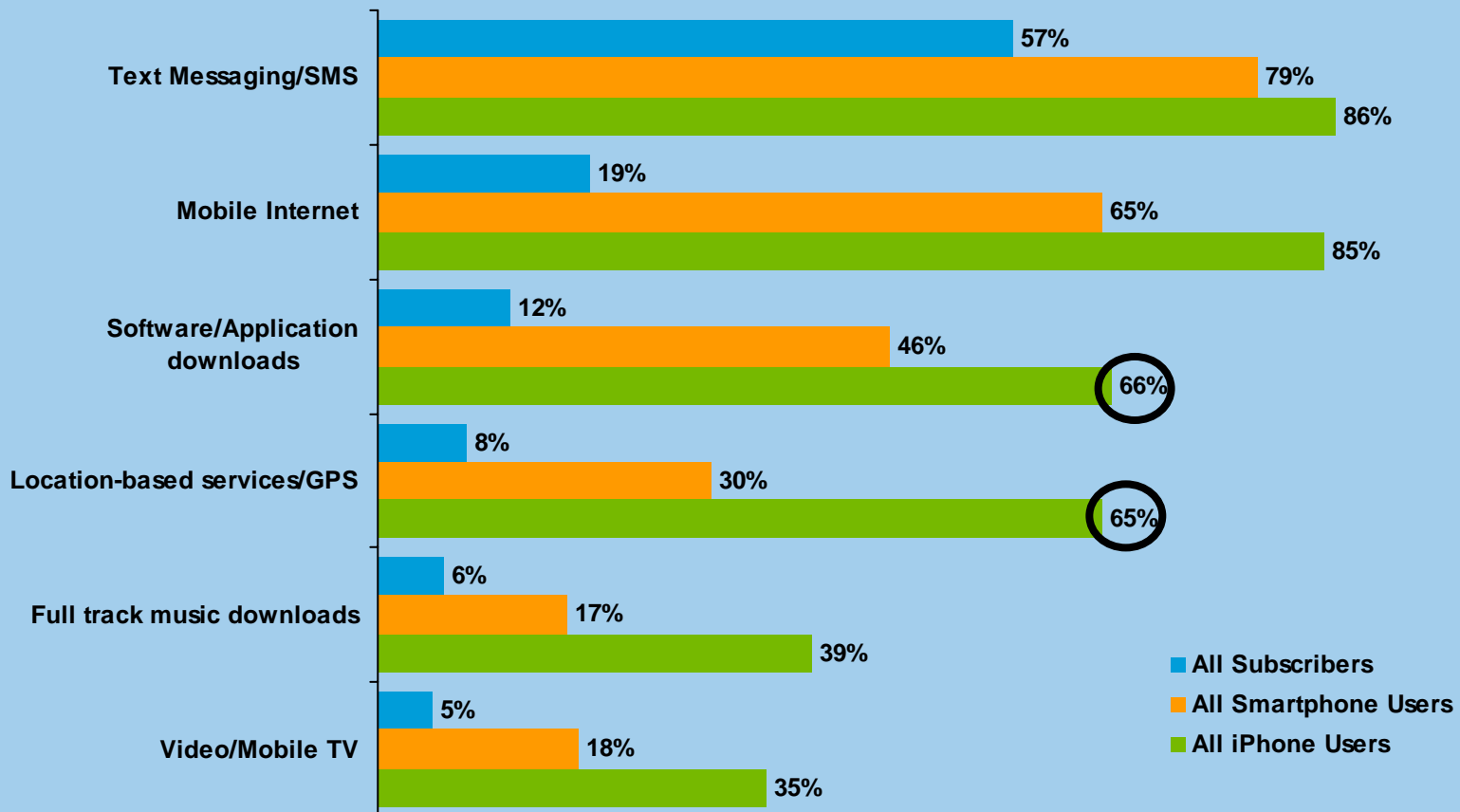
It wouldn't be a Mobile Media panel without it! iPhone users in the US head towards 5M for the holidays...



If you build it... Rich Media platform and Flat Data show performance

Major Data Activities by iPhone Users – Past 30 Days

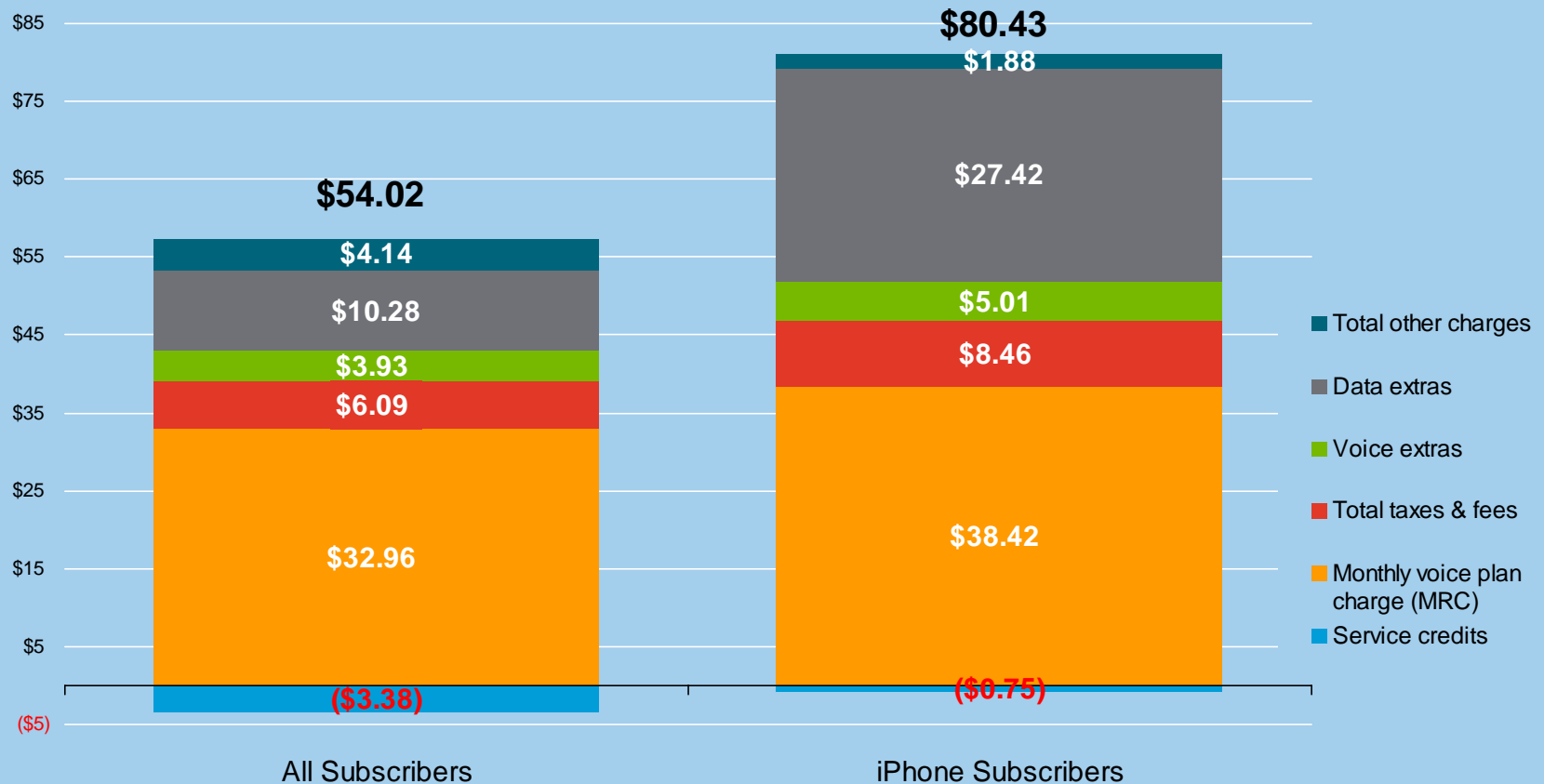
Q3 2008



...And Consumers will pay.

Average Billed Revenue Per Subscriber Component

All Lines, Q3 2008, National



Questions:
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