

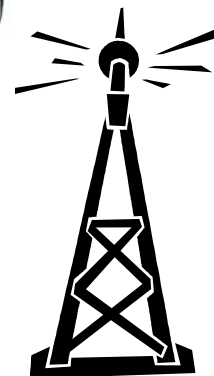
The Mobile Content Market



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Informa Telecoms & Media

Our focus

Global mobile, fixed & service provider strategies and market trends



Strategies
& Markets

Content

Technology

Infrastructure & networks, hardware & software, handsets & devices

TV, film, music & games, mobile content & applications

Content & Applications

Continuous Research Services (newsletters)

MM Mobile Media

MMA Mobile Messaging Analyst

Reports 2006

Mobile Entertainment

Mobile Search & Discovery

Mobile Music

Mobile Games

**Mobile Communities and
User-Generated Content**

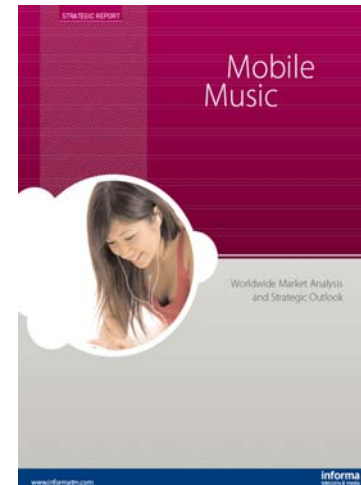
Mobile Content & Services

Mobile Advertising Services

i-mode 2006

Getting Into Mobile TV

**Mobile Content Industry
Survey**



Agenda

Market sizing

Data

SMS/MMS

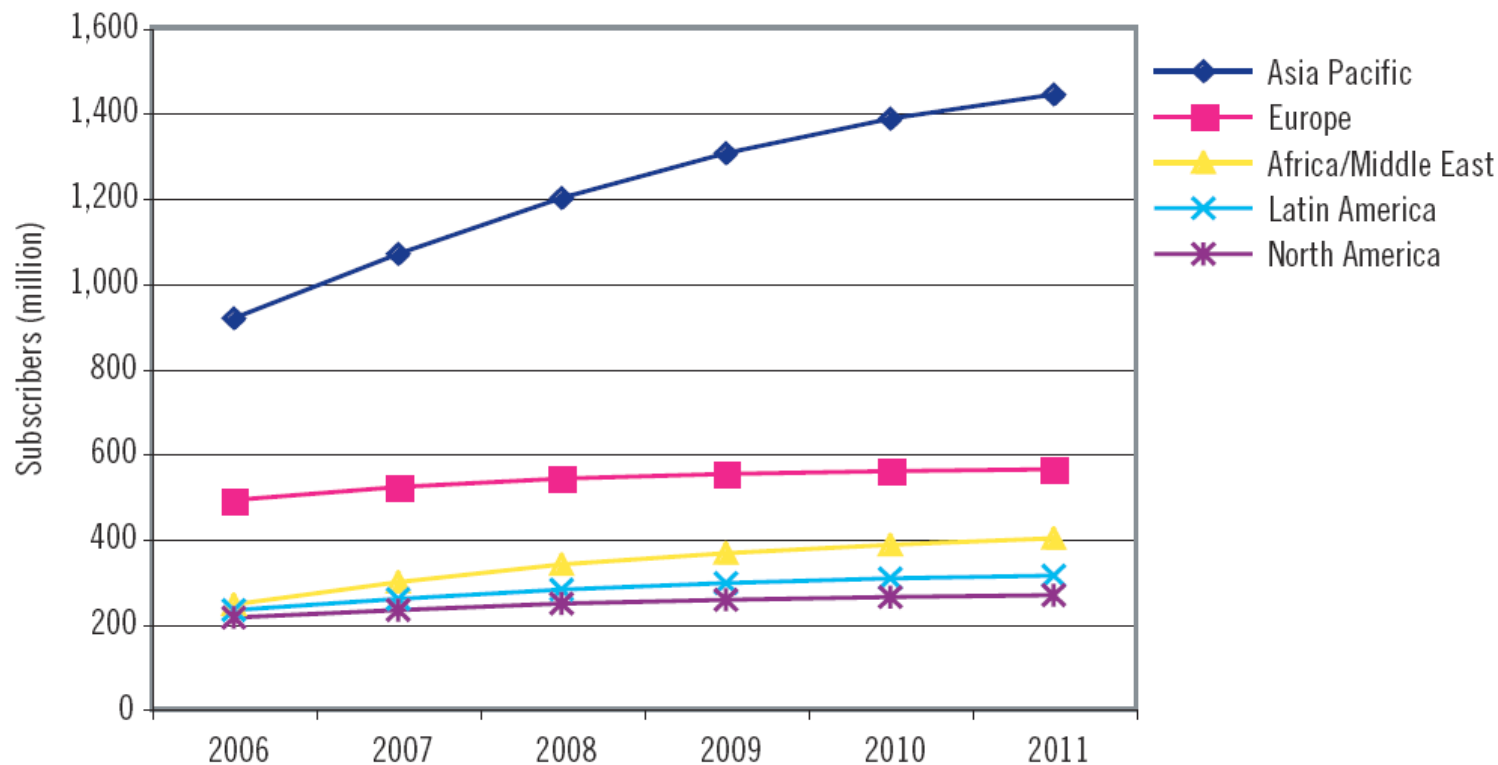
Forecasts

Drivers

Content access
evolution

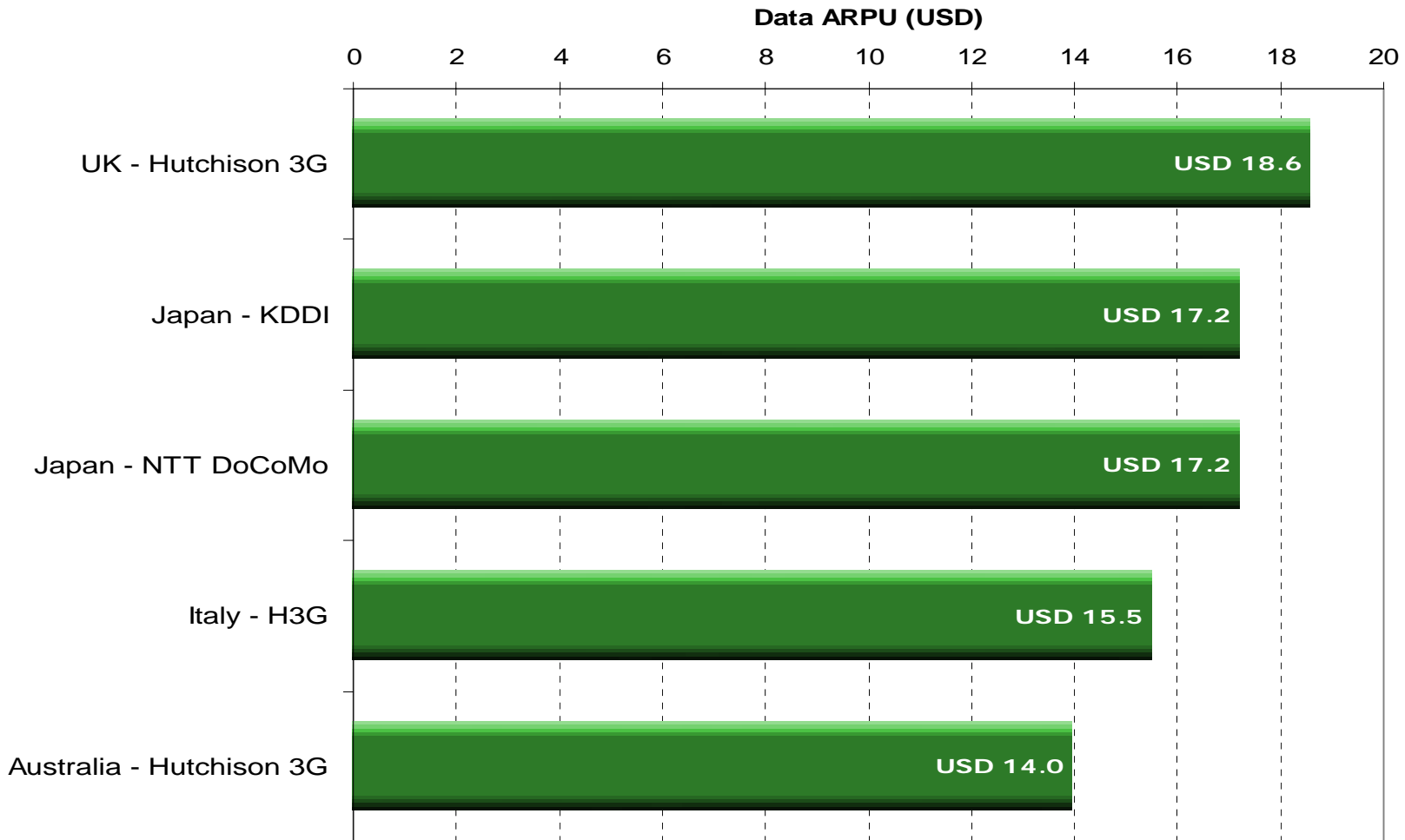


Mobile subscriber forecasts

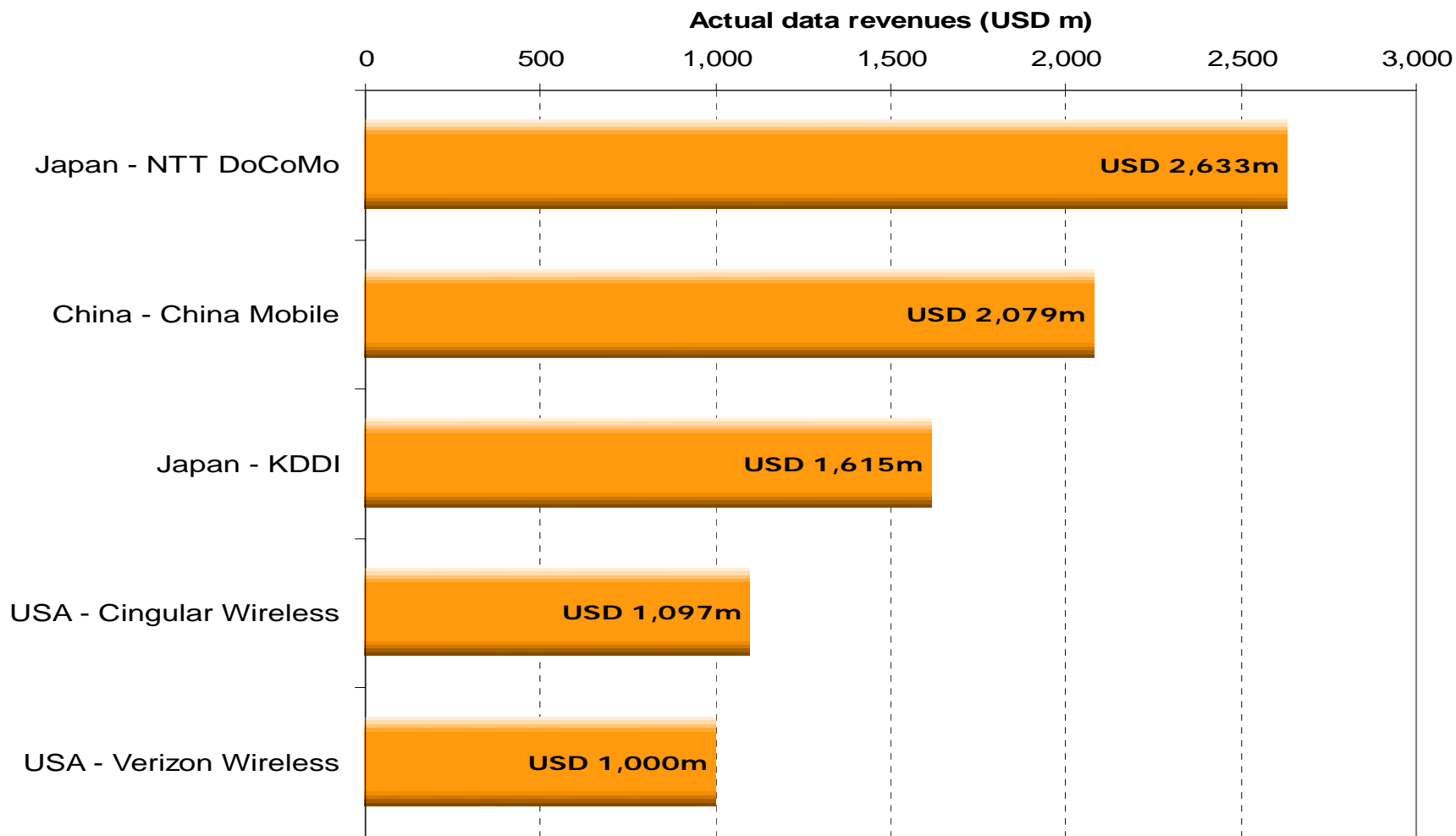


Source: Informa Telecoms & Media

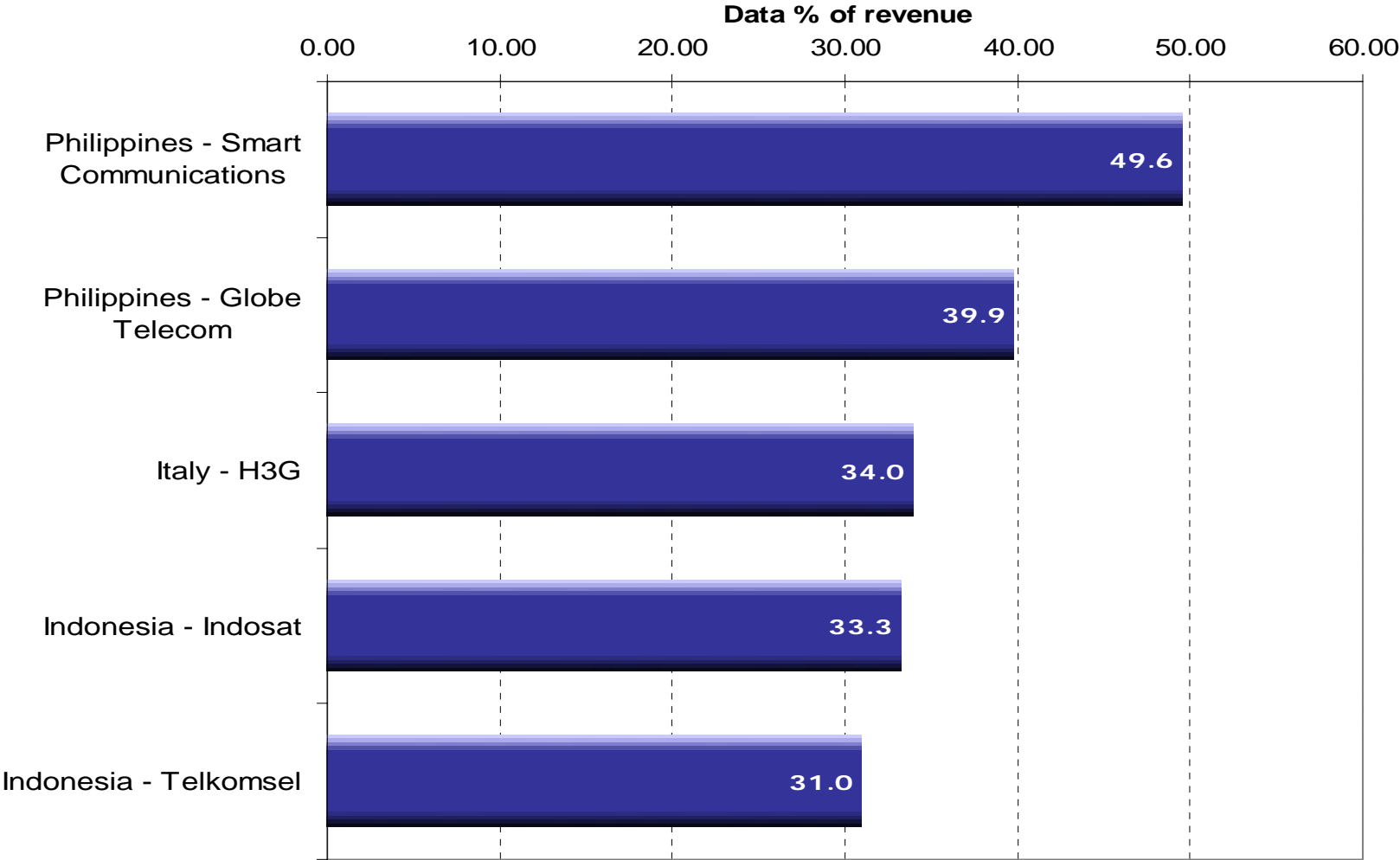
Data ARPU (Q2 2006)



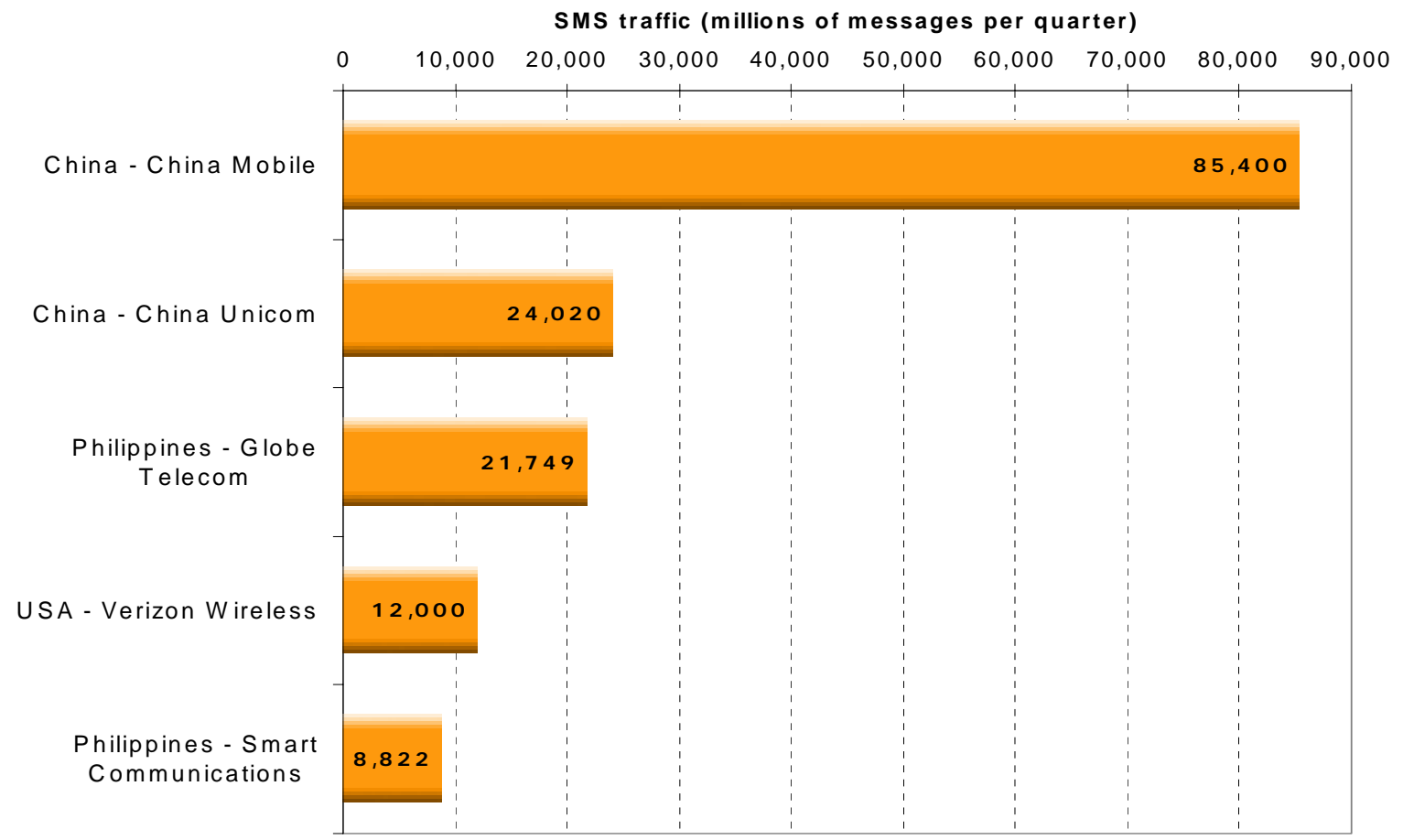
Actual Data Revenues (Q2 2006)



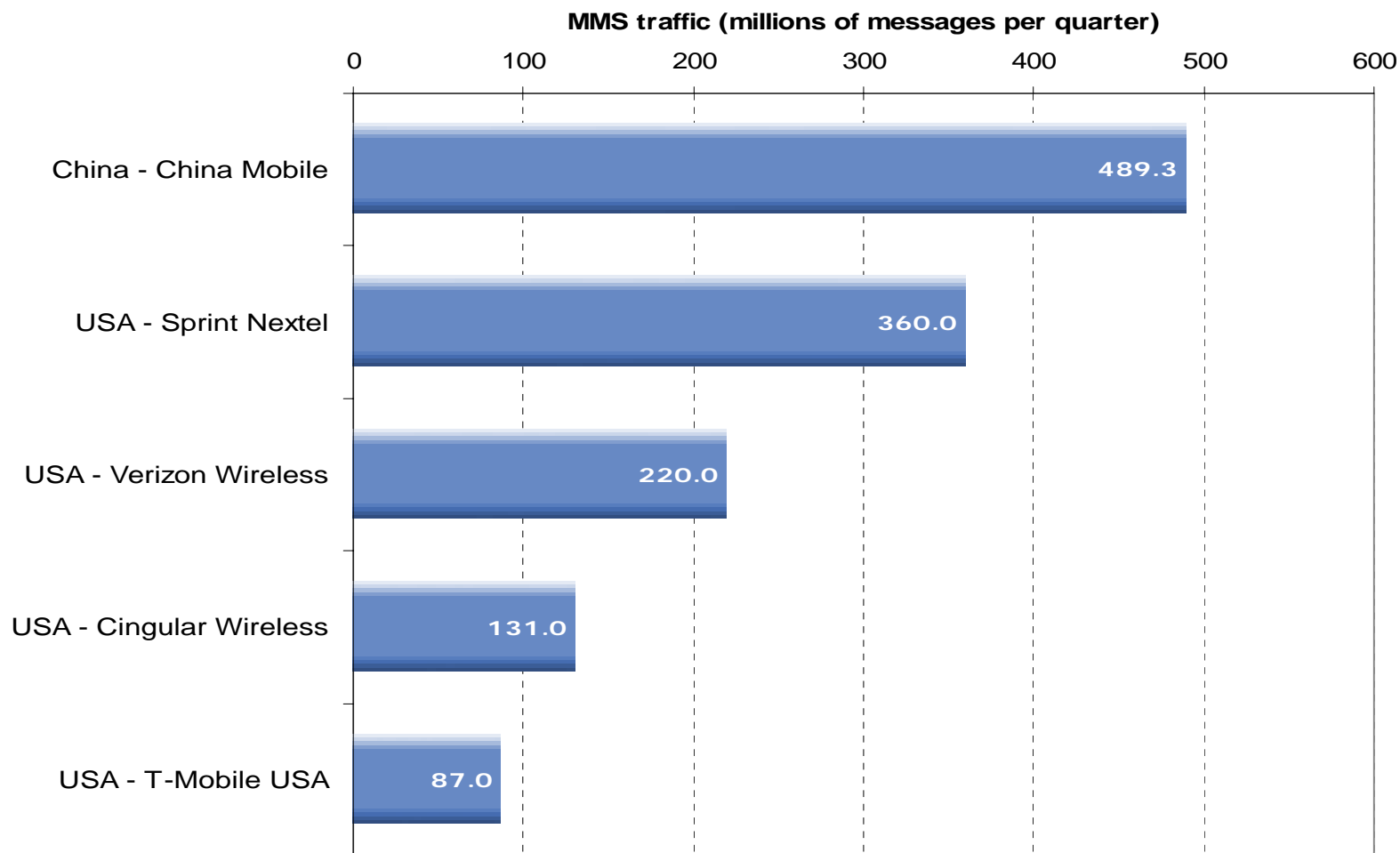
Data as a % of Revenue (Q2 2006)



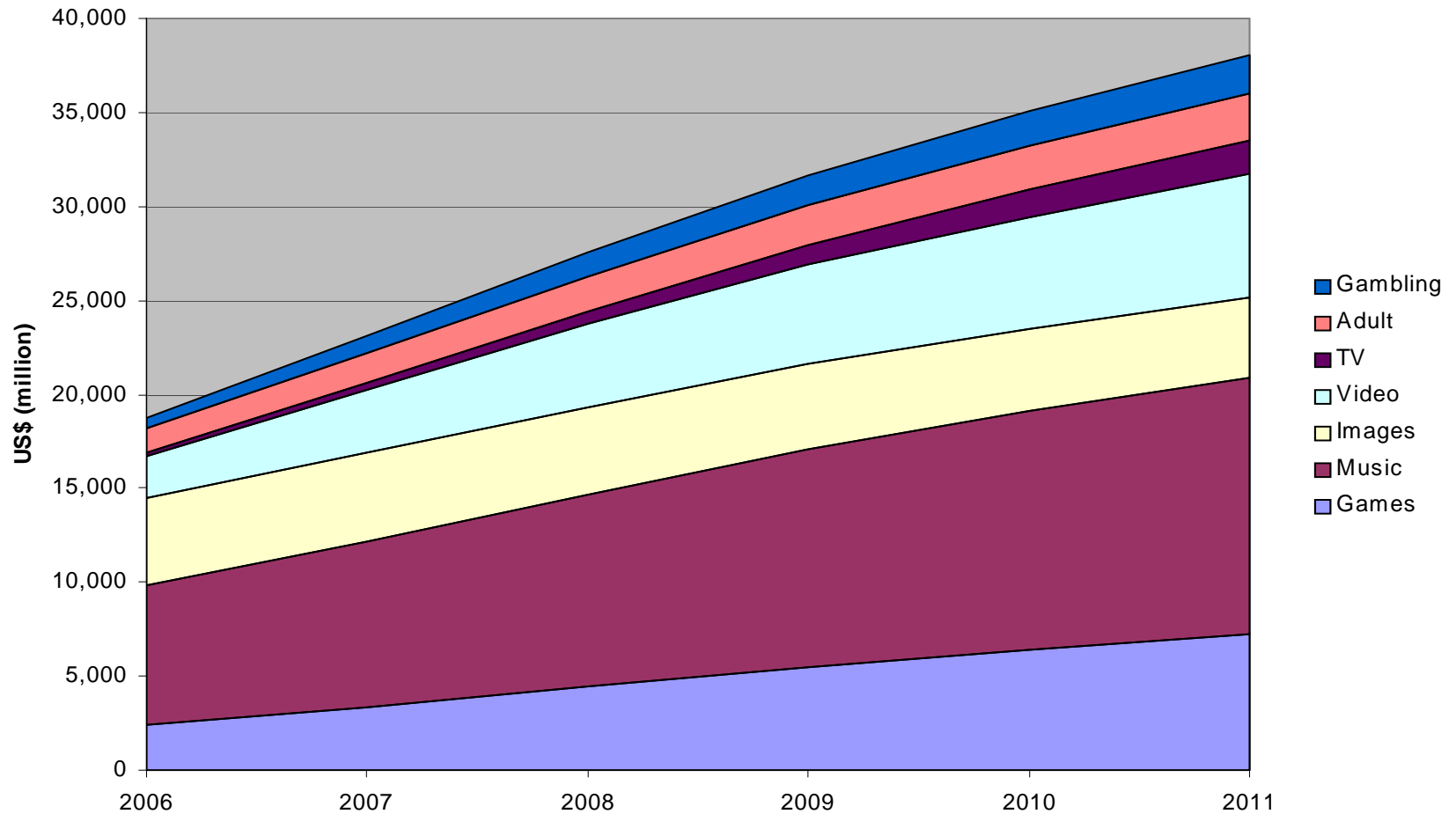
SMS Traffic (Q2 2006)



MMS Traffic (Q2 2006)



Global Mobile Entertainment Revenues



Drivers for the Mobile Content Market

Mobile Communities and User Generated Content

SeeMeTV

100k uploads

1m downloads per month

Kink Community

350k messages per day

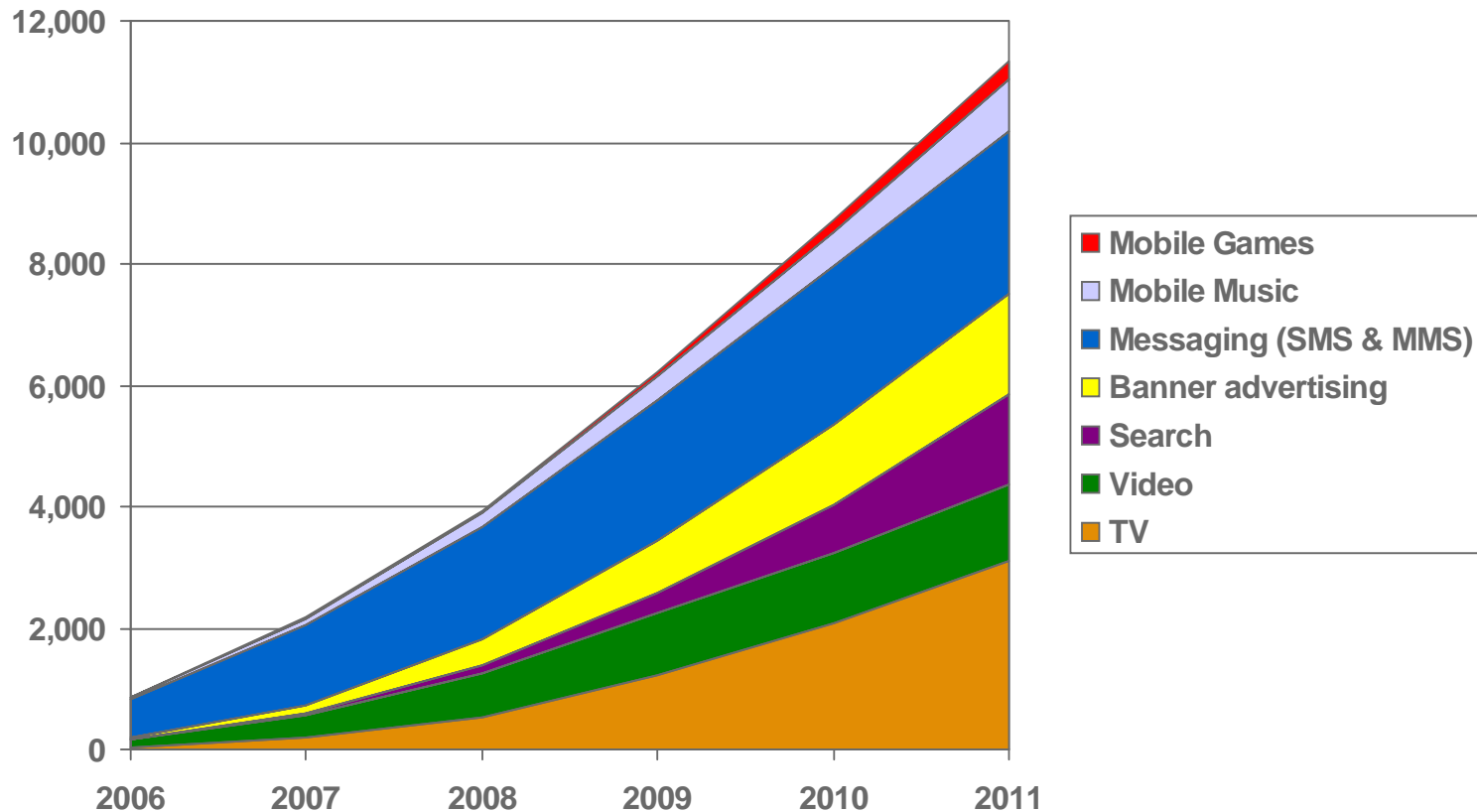
3.75m users



Drivers for the Mobile Content Market

be better
informed

Mobile Advertising Revenues (US\$m)



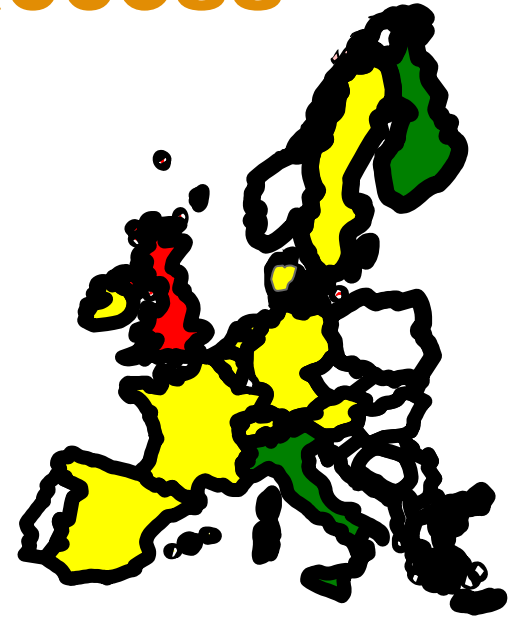
Evolution of content access

Mobile Broadcast

...spectrum issues...

Side loading

...O2, Cingular, Sandisk...



Evolution of content access

Wi-Fi

...Nokia, T-Mobile...



Time-shifting \longrightarrow Place-shifting

...TiVo, Orb, Slingbox...



Take our industry survey and have a chance to win a PSP

www.informatm.com/mobilecontentsurveyq306

Questions?

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