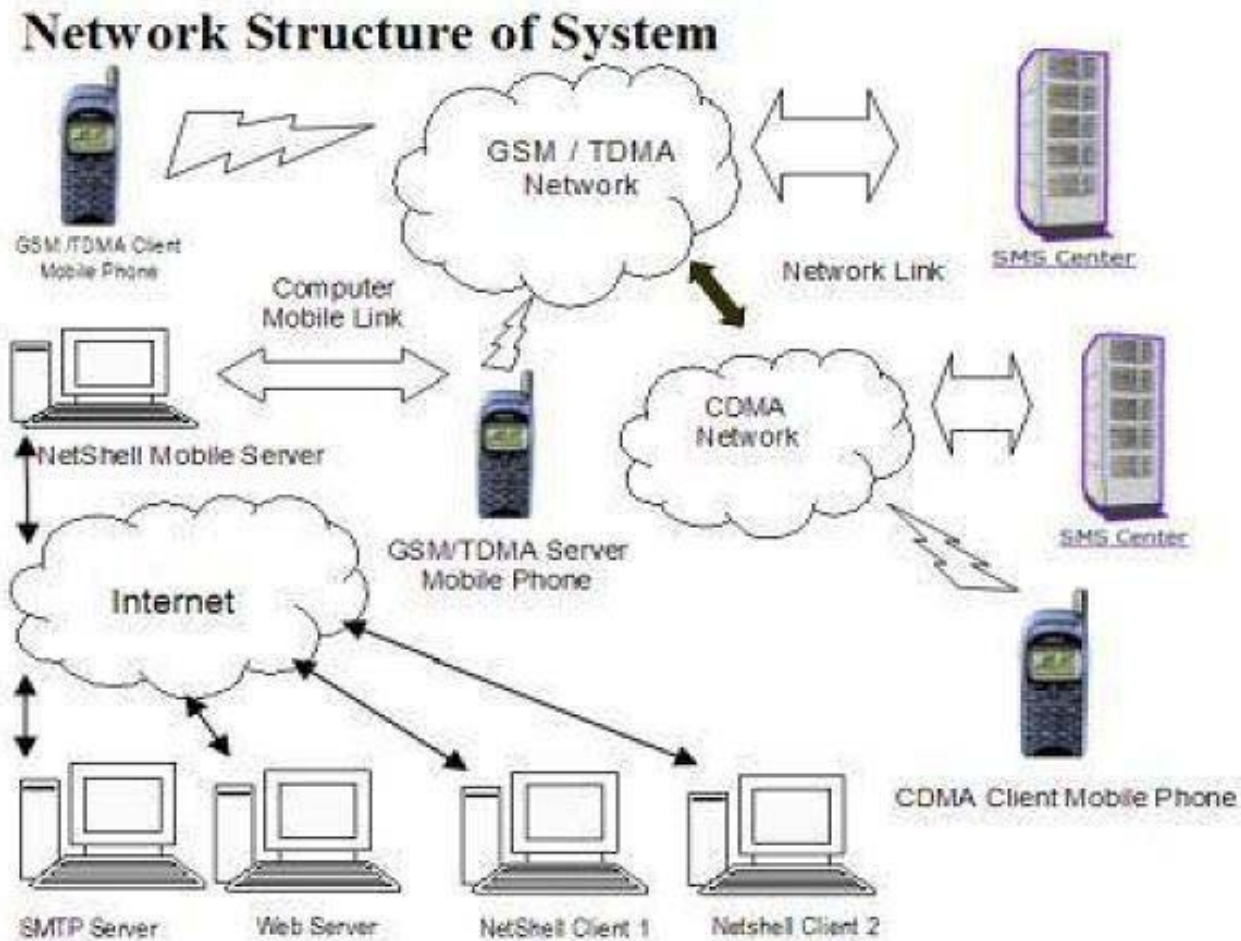


'The Future of Mobile'

Edward Kershaw
VP Mobile EMEA



From boxes and clouds...



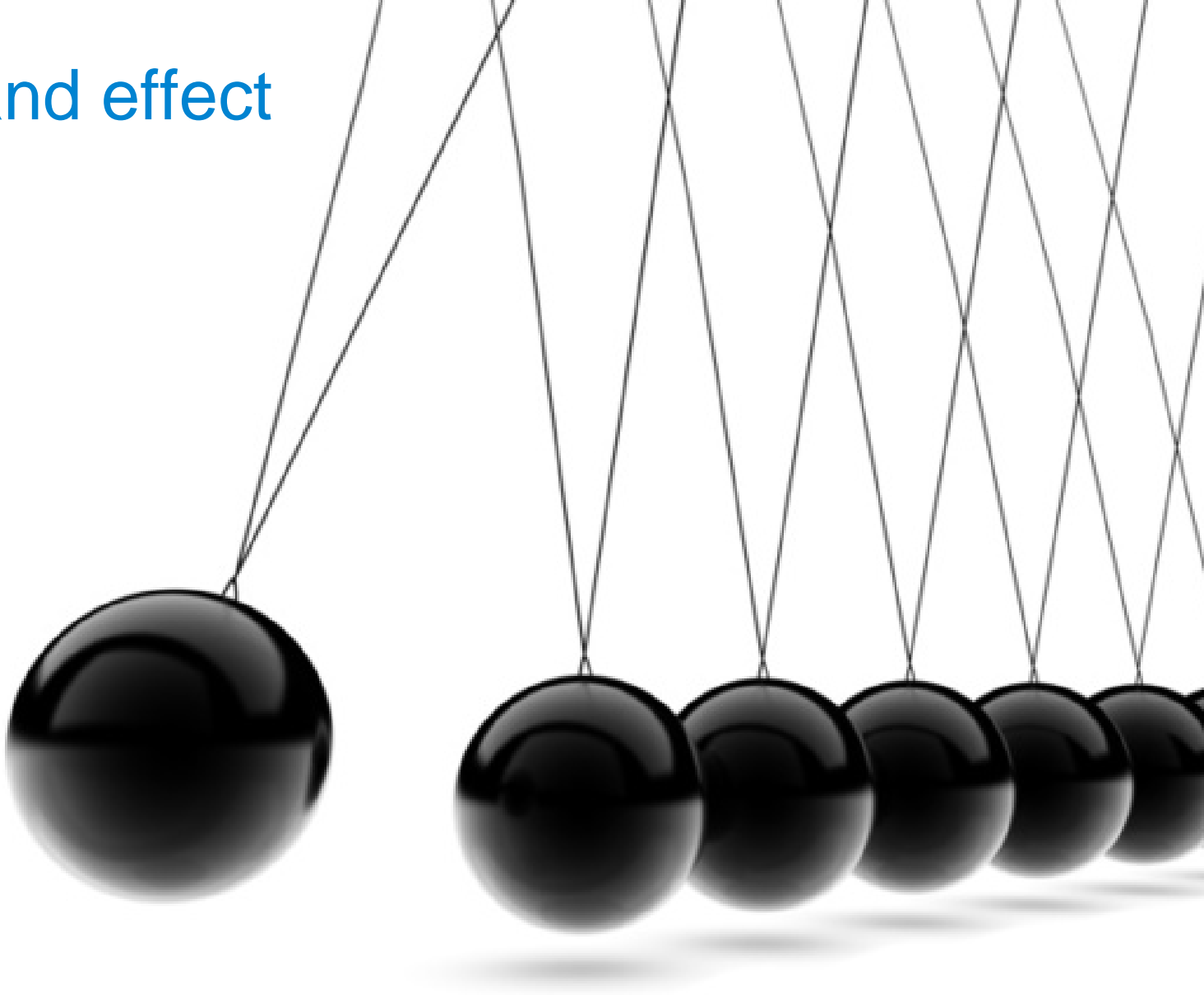
... To fruit ...



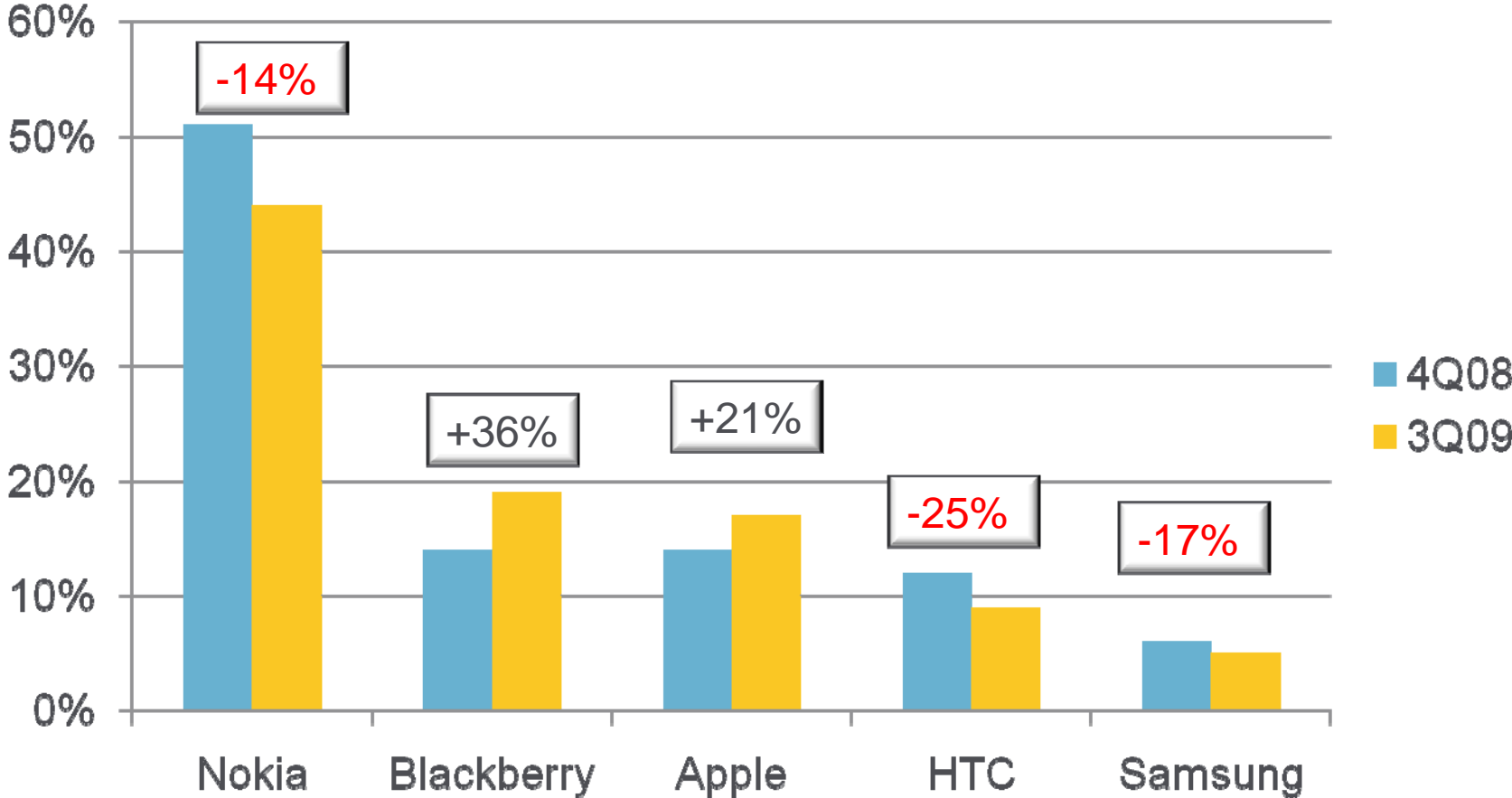
... And cakes



Cause and effect



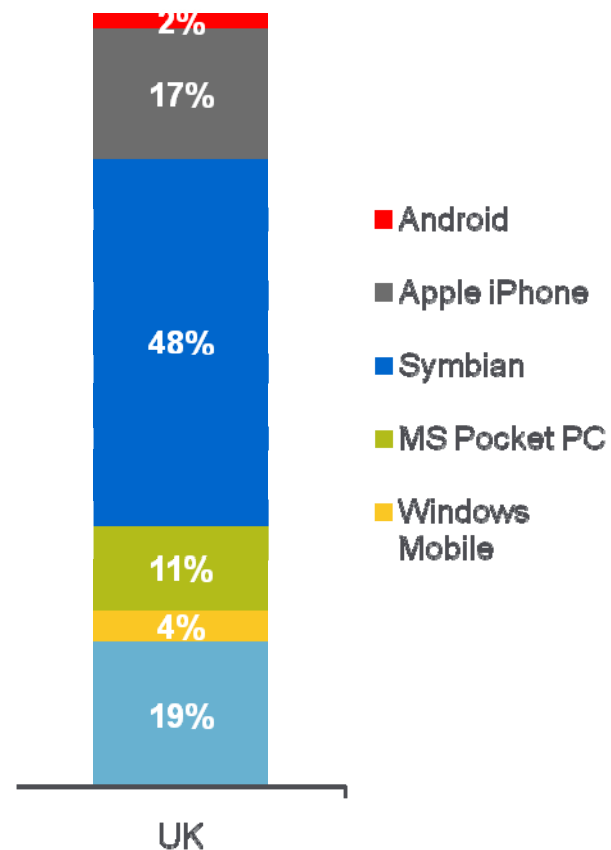
Smartphone market evolution by manufacturer - UK 3Q09



Nokia's long reign in smartphones is under threat, as new operating systems begin to thrive



Smartphone Composition By OS
UK, Q3 2009

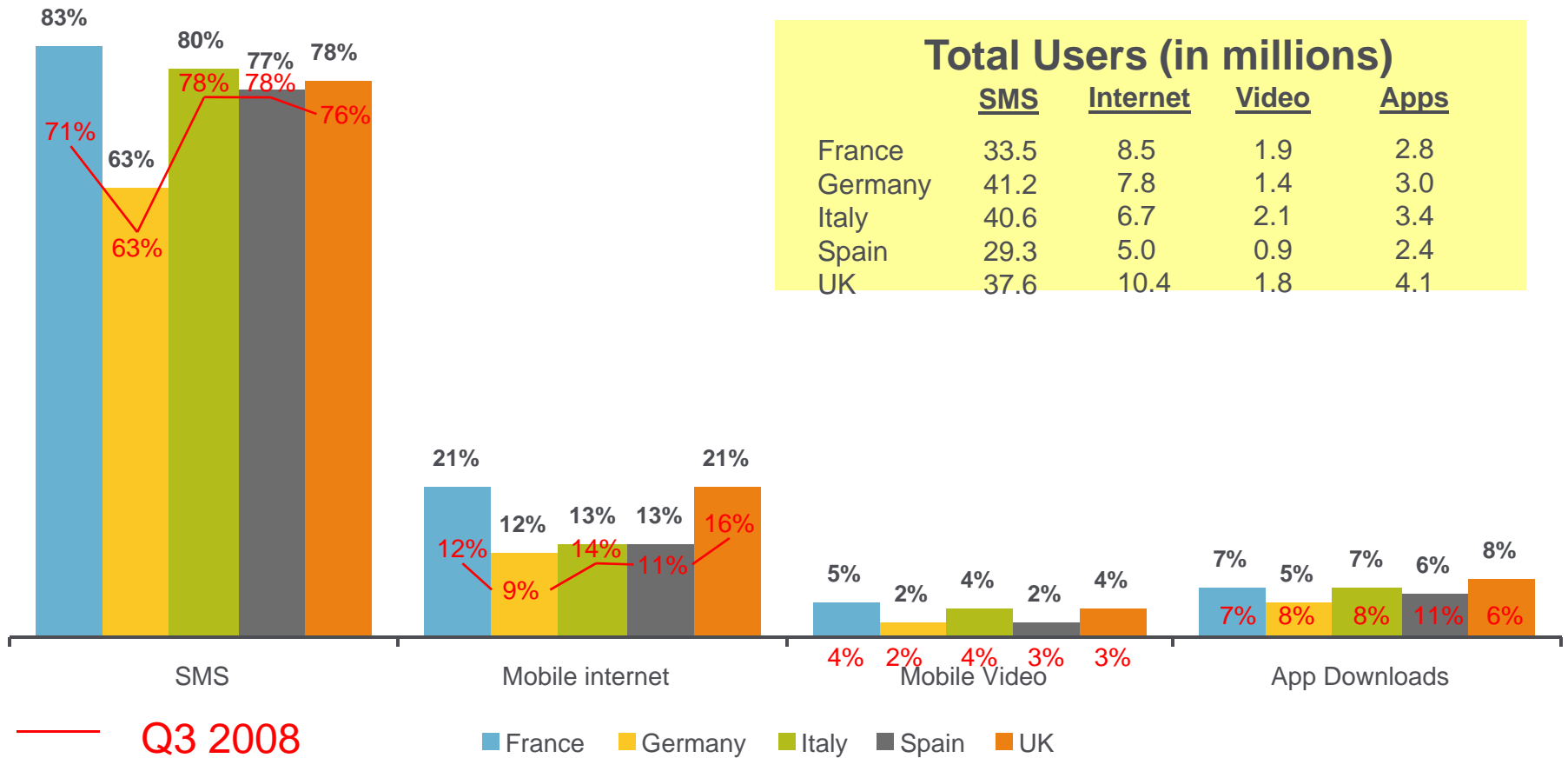


Mobile internet continues to grow

Mobile internet adoption has reached the 'magic' 20% level in UK & France

Mobile Media Usage Penetration by Country

Q3 2009



Why is this important?



- All the biggest drivers of mobile internet usage are heading in the consumer's favour:
 - Speed
 - Handset price and tariff
 - Handset usability and screen size
 - Social networking and search
- The mobile story is only just beginning



3 things to expect



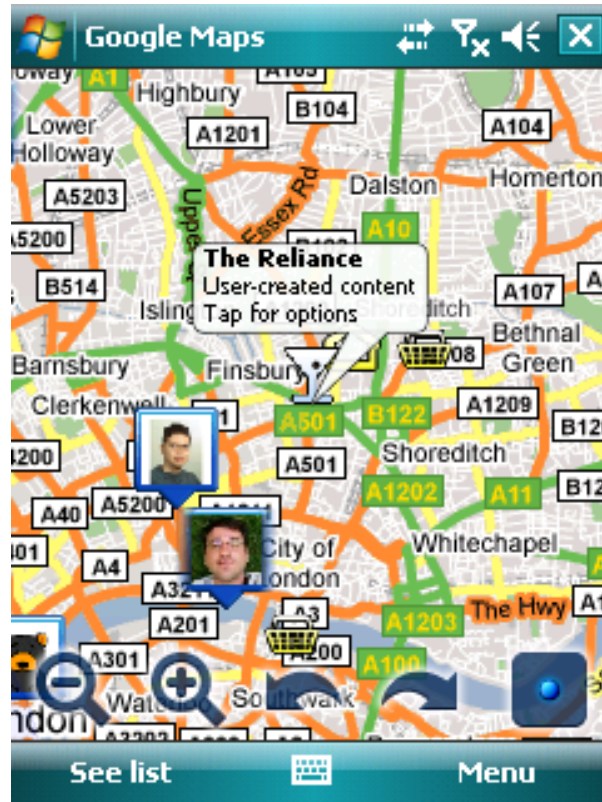
Operators are facing more change

- Operator portals appeal has naturally waned
- Data volume is growing rapidly, and operators have to build for it
 - AT&T mobile data volume has increased 50x in 3 years
- WiFi has become a help for operators, rather than a threat
- Is it all about devices, not operators?

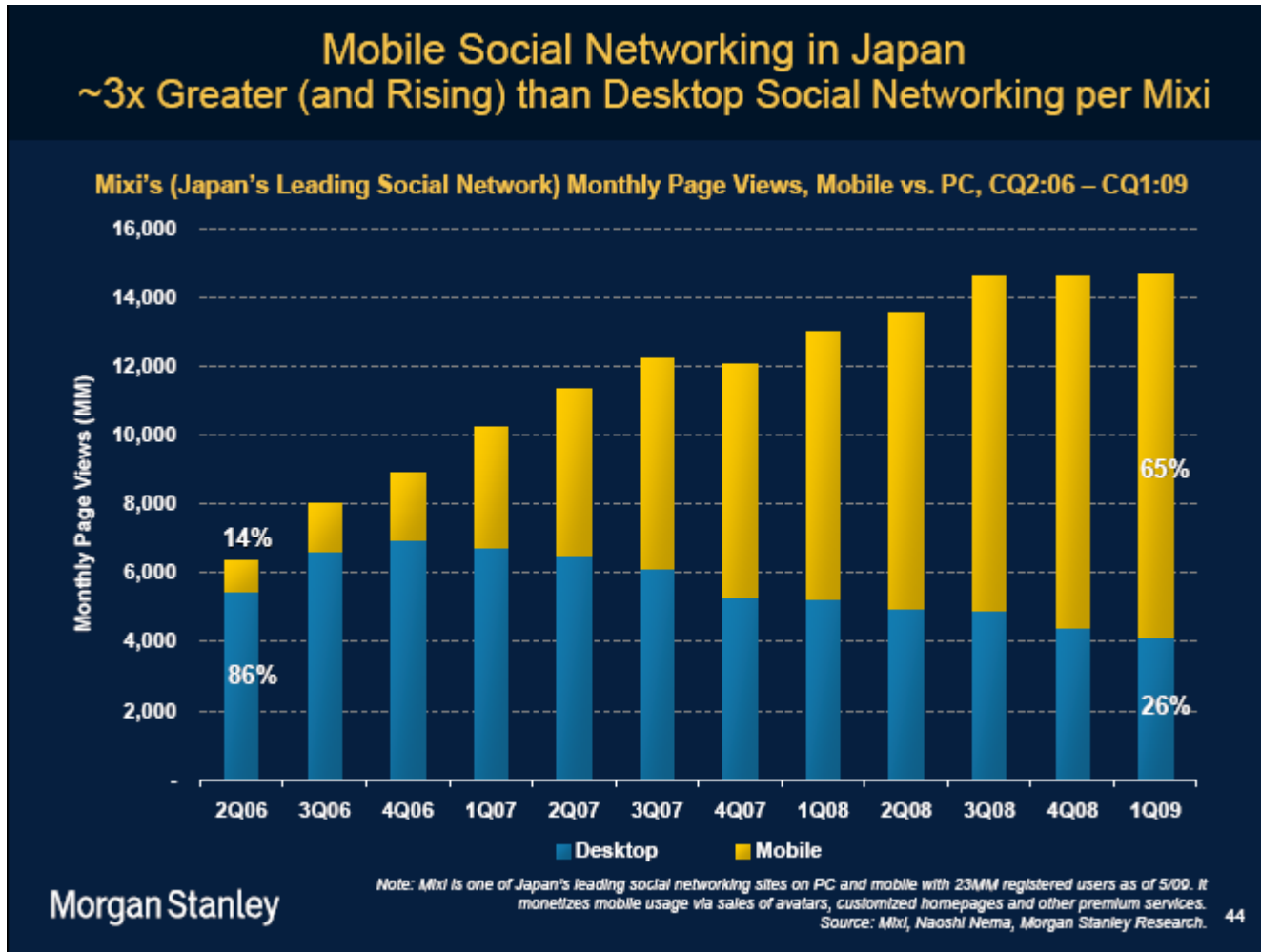
Google Search
Facebook
BBC News
Windows Live Hotmail
BBC Weather
BBC Sports
Yahoo! Mail
Gmail
Vodafone Portal Entry Page
SKY Sports
Google Maps
eBay
Orange
O2 Portal Entry Page
BBC Entertainment
BBC Business News
Amazon

Report: Standard Metrics (IM Applications Excluded) Channel Period: Qtr 3, 2009 Operator: All Operators
Country: United Kingdom

Location, Location, Location



Social Networking becomes more and more mobile: from 'get' to 'connect'



Summary

- Mobile is undergoing an explosion of creativity, usage and penetration
- Despite the gloom of 2009, almost every KPI within mobile technology, media and advertising has grown at least double-digit
- “If you can’t measure it, you can’t manage it” Guy Laurence, Vodafone



Thank You!

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