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## Presentation Abstract

The presentation will take the audience from the early days of mobile applications to today where application convergence is driving the marketplace.

The background will include the early revenue models for service providers and to how developers and investors can benefit by accessing the mobile application market.

Also a description on how the handheld market has evolved from a service provider only arena to a multi-tiered networking market.

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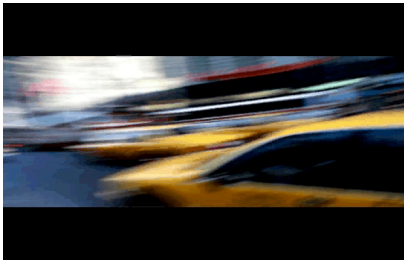
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## Mobile Apps

*It is all about people to people communications*



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## Mobile History - The Start

- Local Pagers 1959
- Radio phones 1962
- Mobile phones 1973
- Consumer Pagers 1974
- Cellular Phones 1979

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## Mobile History - The Explosion

- Digital Phones 1991 1G, 2G, 2.5G
  - SMS Messaging 1993
  - Ring tones 1998
    - Market size peaked at \$700 million+
  - Mobile Internet 1999 1xRTT/GPRS
- Digital 3G 2001 EDGE/EVDO
- Digital 3G+ 2008 HSPDA/EVDO+
- Mobile App Stores 2009

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## Mobile Environment



- Please don't text or talk while driving!!!

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**Smartphone Users**

2009 100 MILLION  
2010 300 MILLION  
2011 500 MILLION  
2012 800 MILLION  
2013 1 BILLION

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**GLOBAL  
CELLPHONE USERS**

**2009 4.6 BILLION**

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**Smartphone Sales Q1 Yr/Yr**

<b>BRAND</b>	<b>Q1 2010</b>	<b>Q1 2009</b>
Nokia	21.5 million	13.7 million
RIM	10.6 million	7.3 million
Apple	8.8 million	3.8 million
HTC	2.6 million	1.5 million
Motorola	2.3 million	1.2 million
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Total	54.7 million	34.9 million
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## Types of Mobile Apps

- Direct access 51%
- Brand Promotion 30%
- Revenue Generation 12%
- Support 7%

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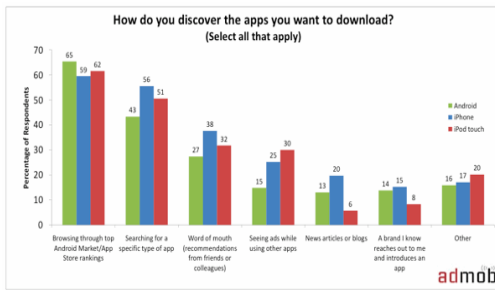
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## How Do You Find An App ?



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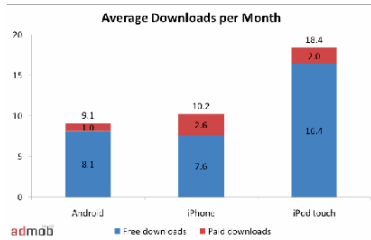
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## Downloads per Month



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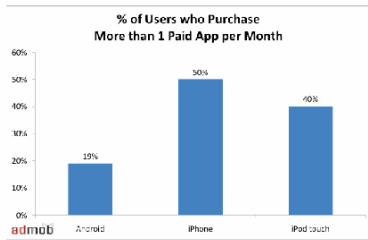
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## Distribution of App Purchases



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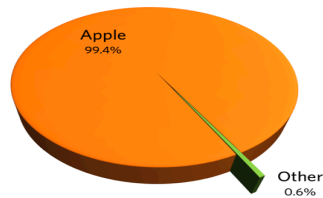
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## Mobile App Marketshare

App Store Market Share, 2009  
Percent



Source: Gartner, Apple

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## Mobile App Revenue

Paid Application Market Size Estimate<sup>(3)</sup>

	Estimated Number of Users	% Who Buy Paid Apps	Average \$/Month Spent on Paid Apps	Est. August 2009 Paid App Market Size
Android	3M	19%	\$8.63	\$5M
iPhone	26.4M	50%	\$9.49	\$125M
iPod touch	18.6M	40%	\$9.79	\$73M

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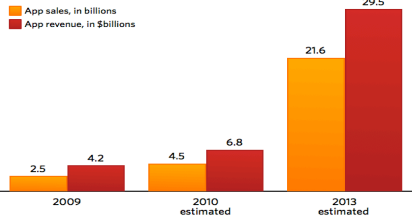
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## Mobile App Revenues

### Mobile App Sales and Revenue



Source: Gartner  
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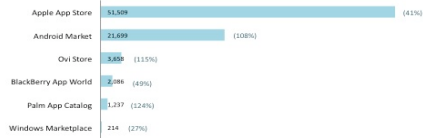
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## Mobile App Growth Rate

### Growth Rates of Apps per Platform During Q1 2010



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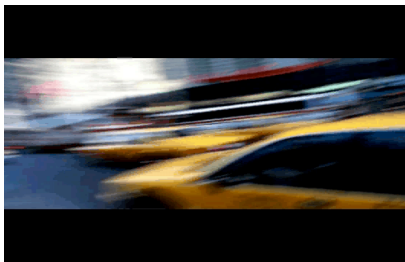
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## Summary Points

- **Mobile Apps Require Bandwidth**
  - *Look for 3G & 4G Network Expansion*
  - *Look out for new billing plans!*
- **Revenue Apps**
  - *Look for consumer "pay for use" vs. "pay for download"*
  - *Look for business orientated "integrated employee" apps*
- **Platform Convergence**
  - *Look for personal preferences and activities that will drive the choice of mobile vs. tethered device*
  - *Look for different business apps that will drive the future smartphone choices*

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Thank - You !!

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