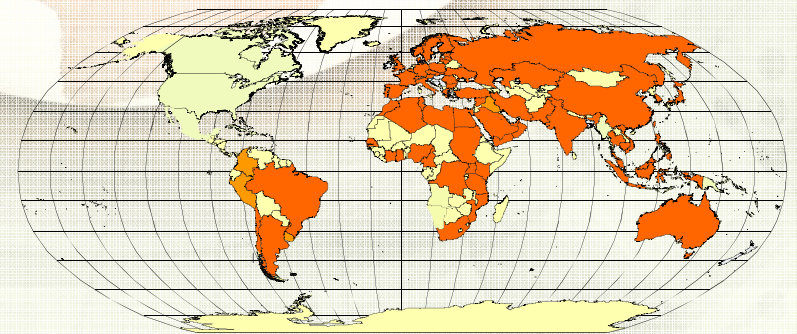


**“Only who understands the past interprets the present correctly and generates a better understanding of the future.”
(Peter Drucker)**



Mobile Trends 2009

GfK Retail and Technology
- Wolfgang Wanders -



Mobile/Smartphones

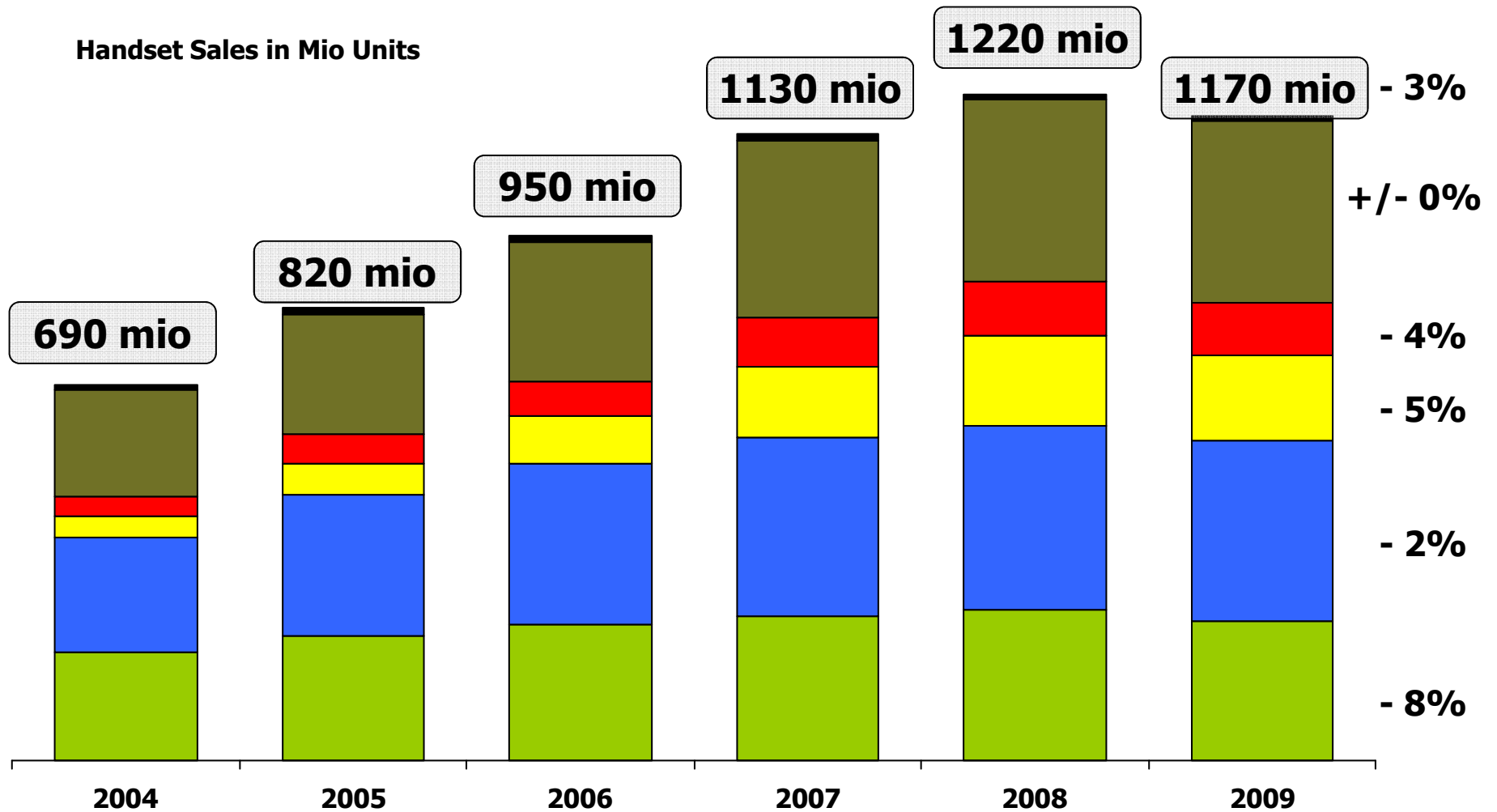
Regions

2004 - 2009

■ EUROPE ■ AMERICA ■ ARABIA / INDIA ■ AFRIQUE ■ ASIA ■ AUSTRALIA / NEW ZEALAND

2

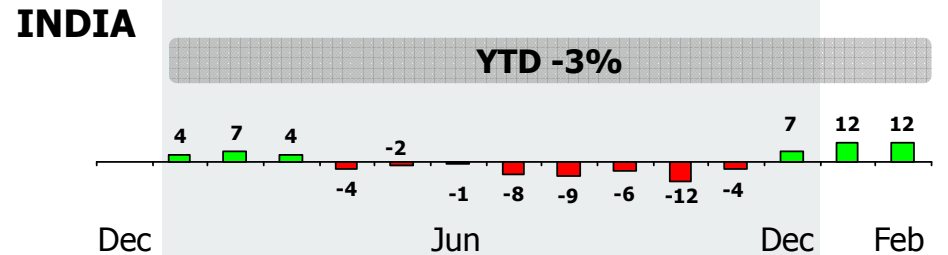
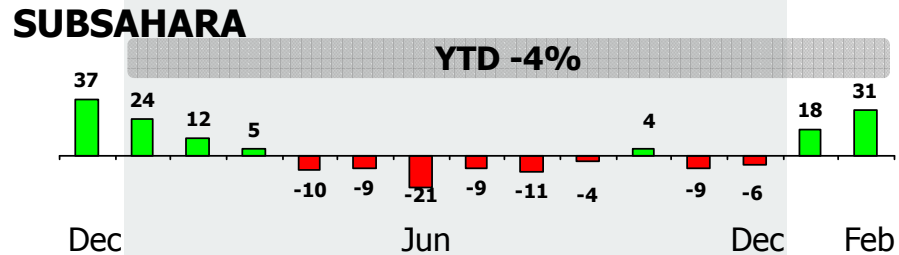
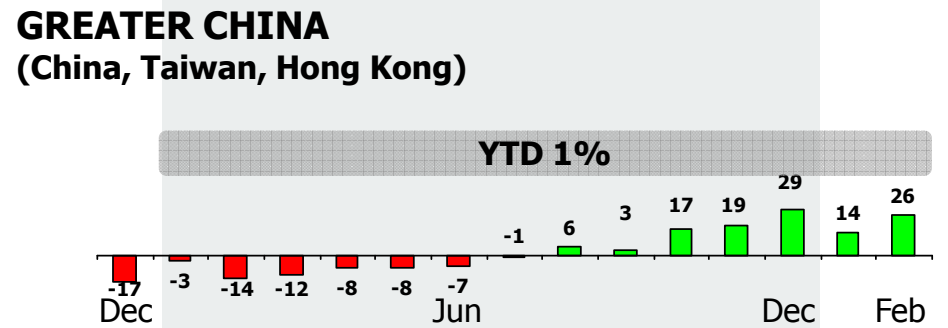
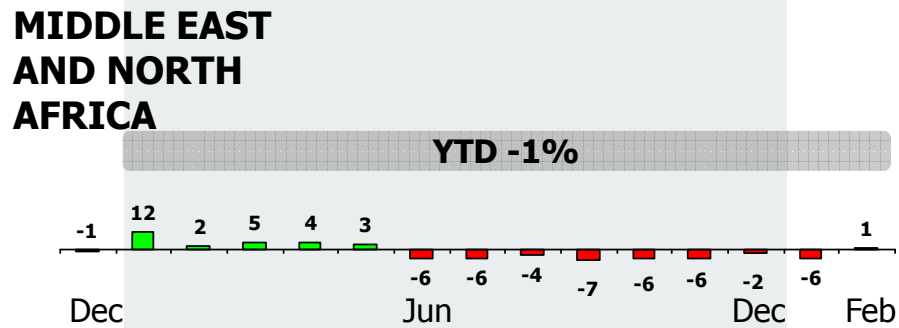
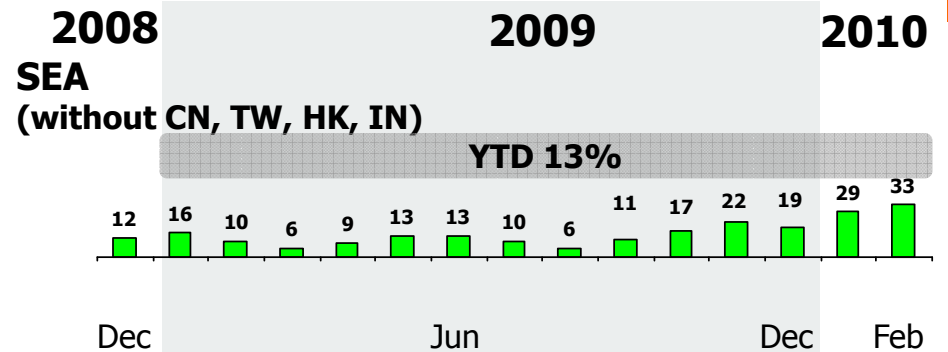
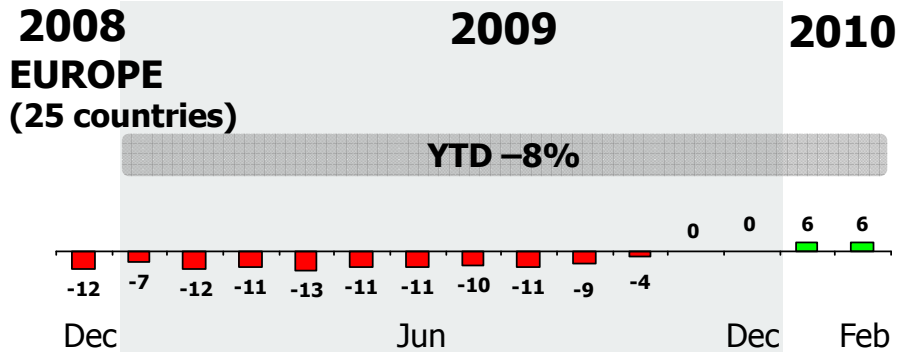
Handset Sales in Mio Units



Mobile/Smartphones

Growth rates vs previous years month and seasonality by region

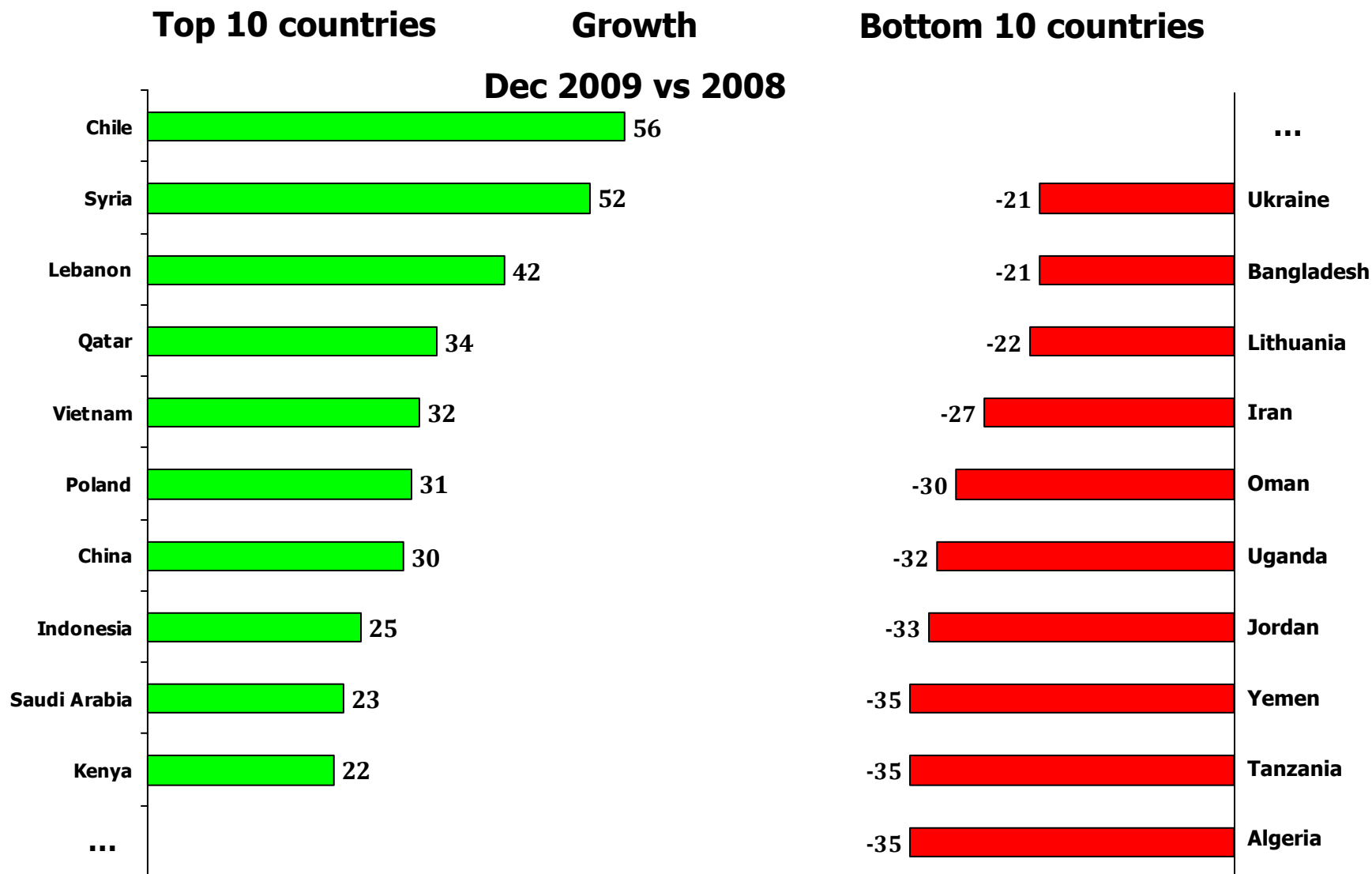
Dec 08 – Feb 10 (100% markets, units)



Mobile/Smartphones

Growth rates vs previous years month

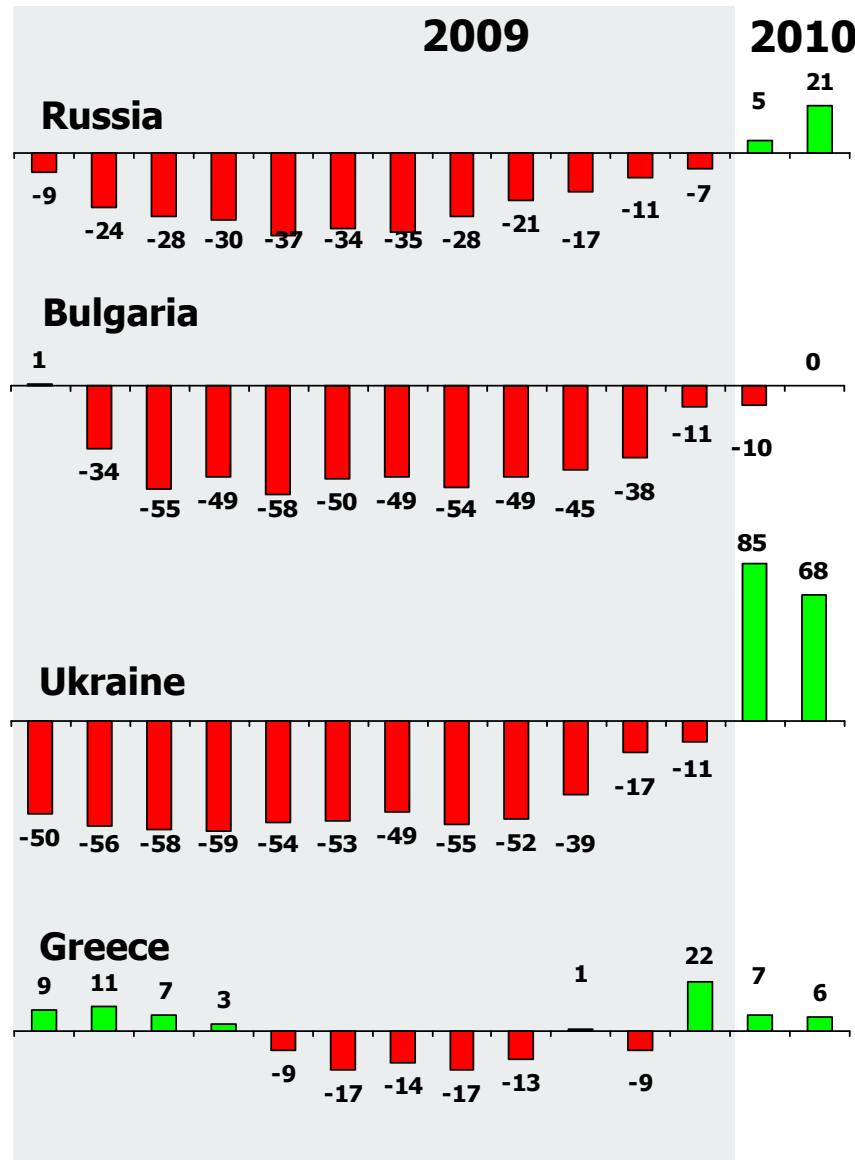
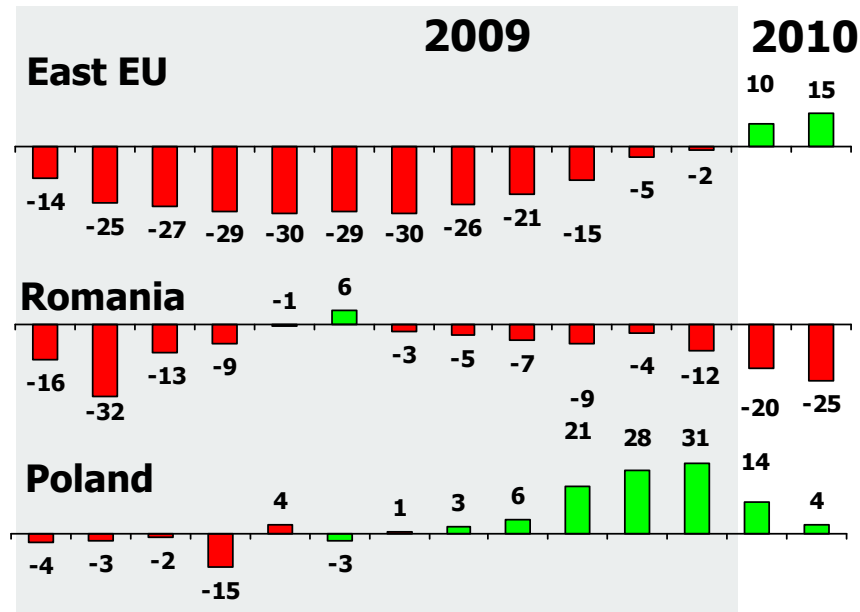
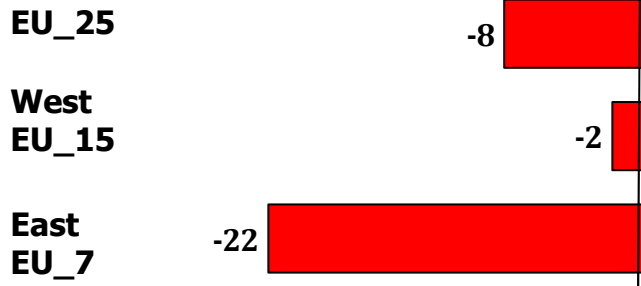
Dec 08 vs Dec 09 (100% markets, units)



Mobile/Smartphones
Growth rates vs previous years month
Jan-Dec 09, Jan 09 – Feb 10

East EU

Sales Units Growth
Jan-Dec 09

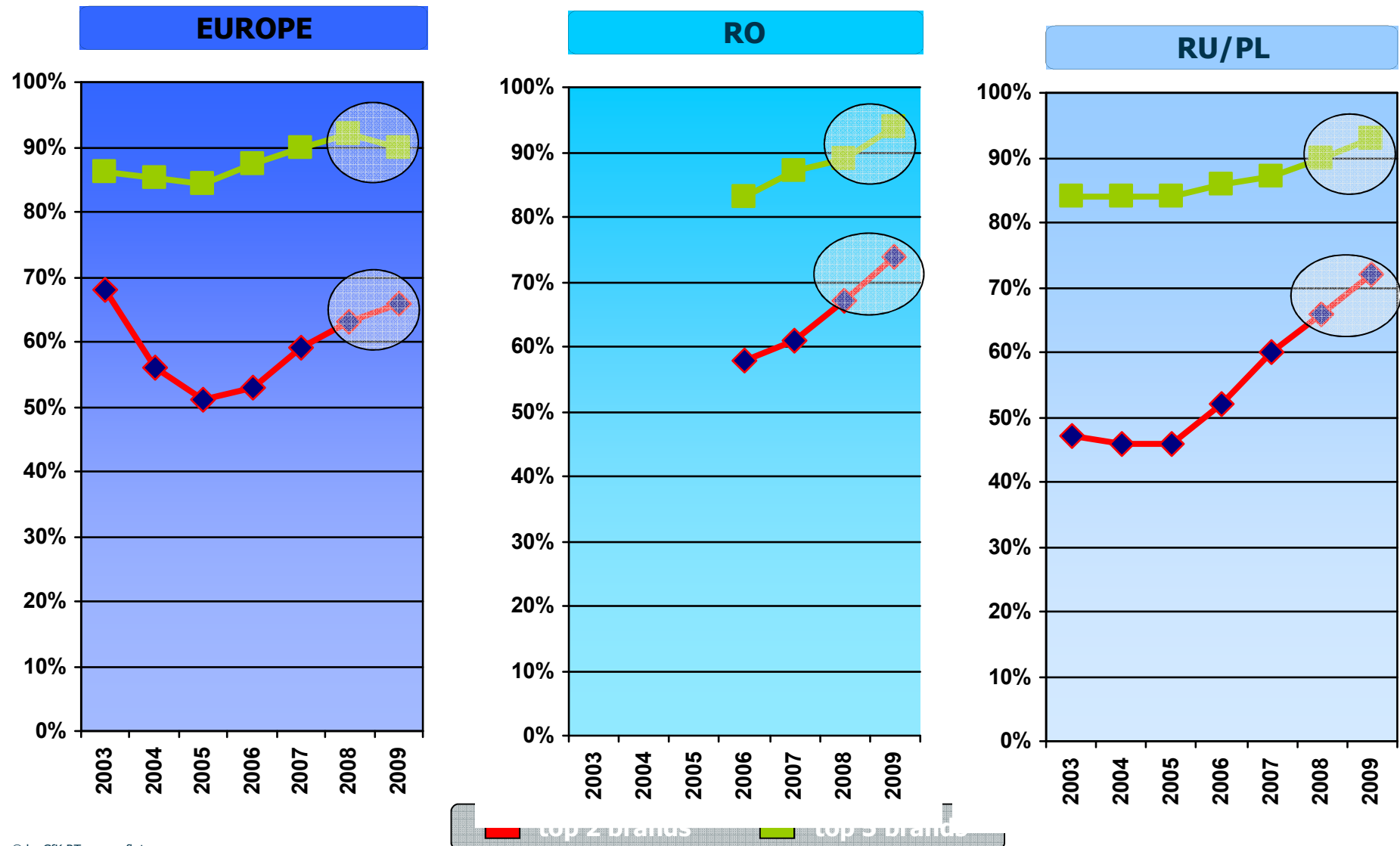


Mobile/Smartphones

Share Top2 Brands, Top5 Brands

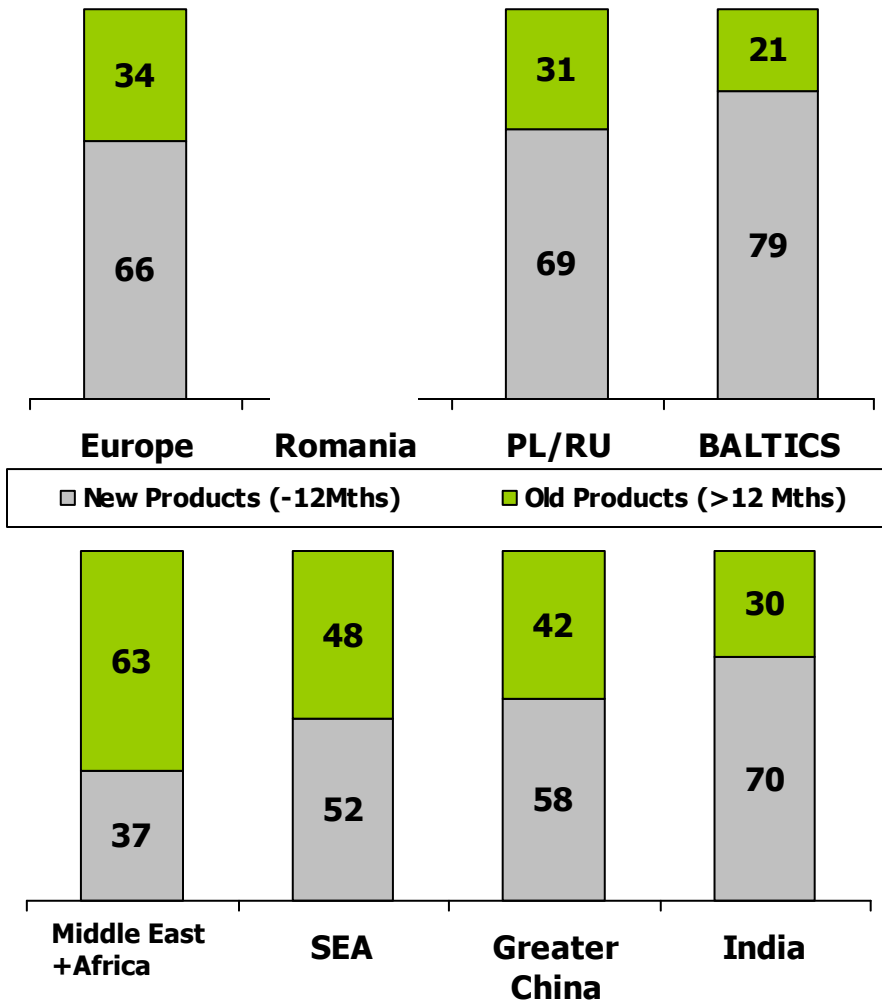
2003 – 2009

6

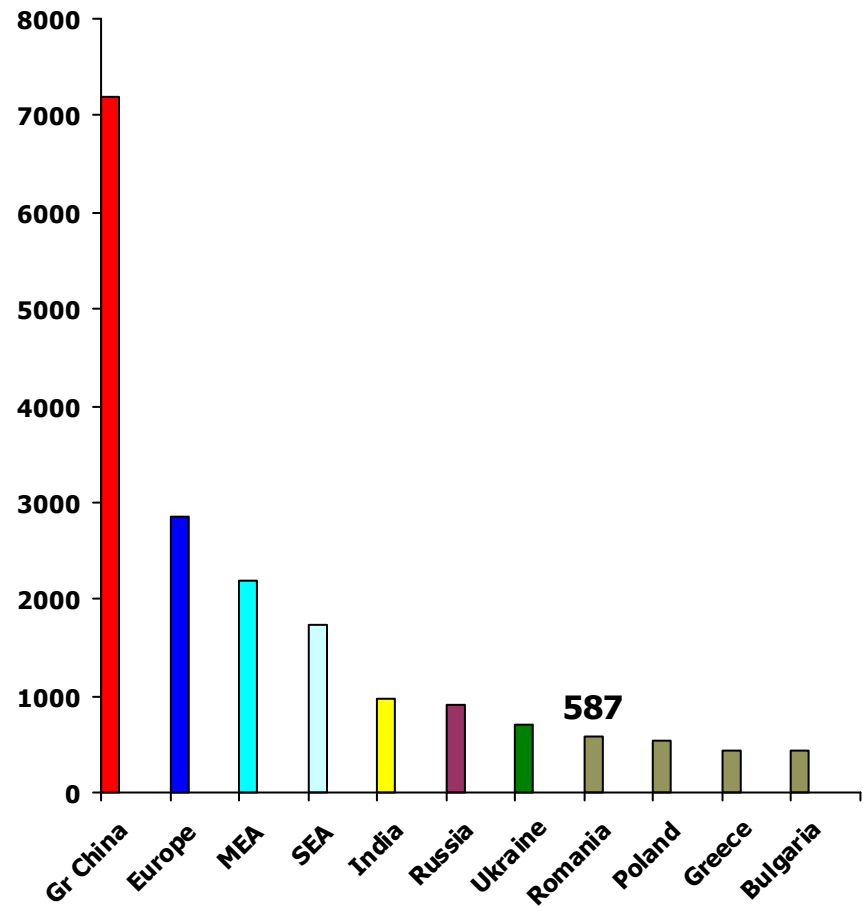


Mobile/Smartphones
 market structure by age of products
 share units %, Dec 09

**Market share sales units
 Dec 2009**



**No. products by region
 December 2009**

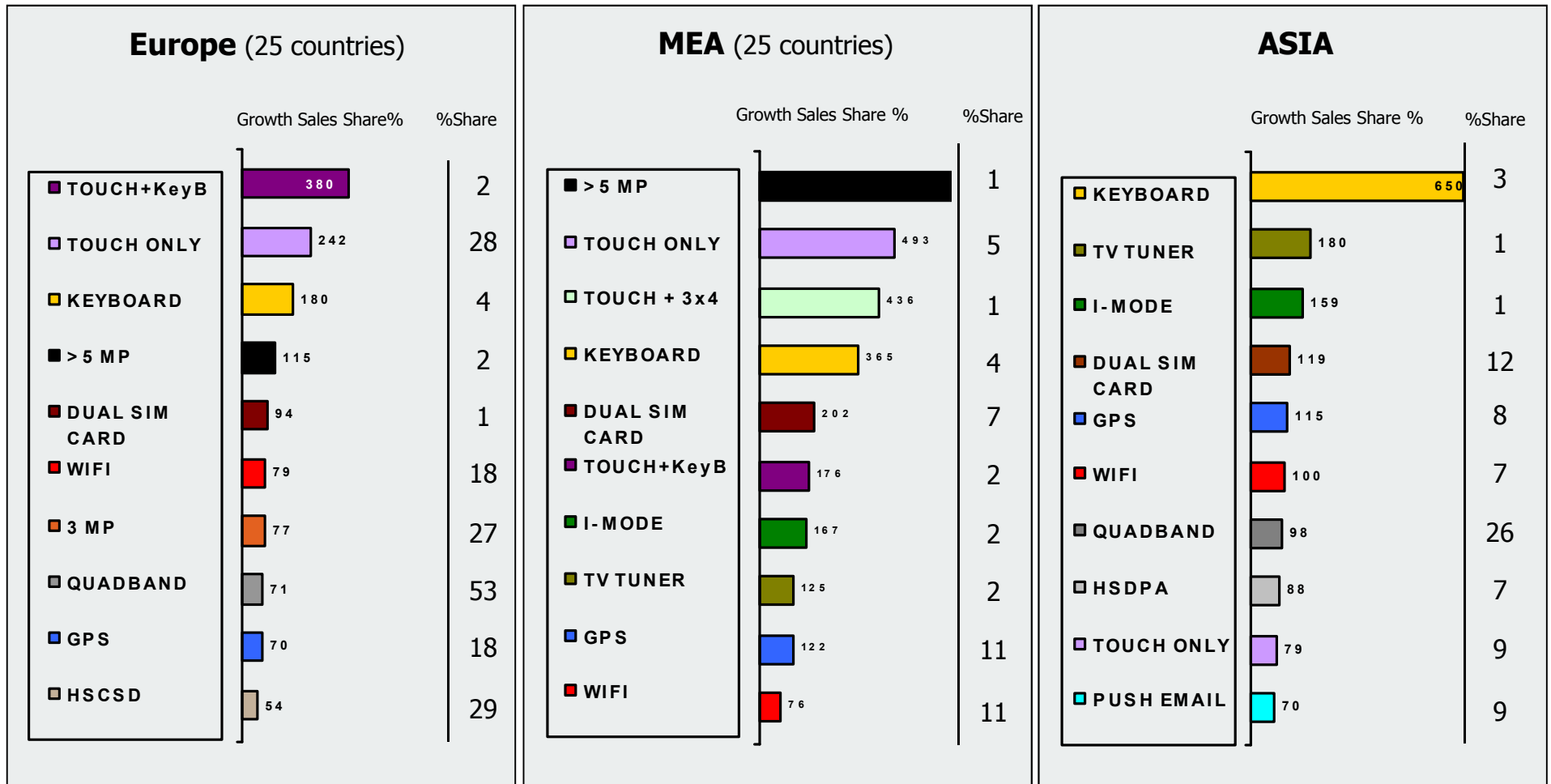


Mobile/Smartphones

Feature segments, growth rates based on segment shares in %, Total Market

Dec 09

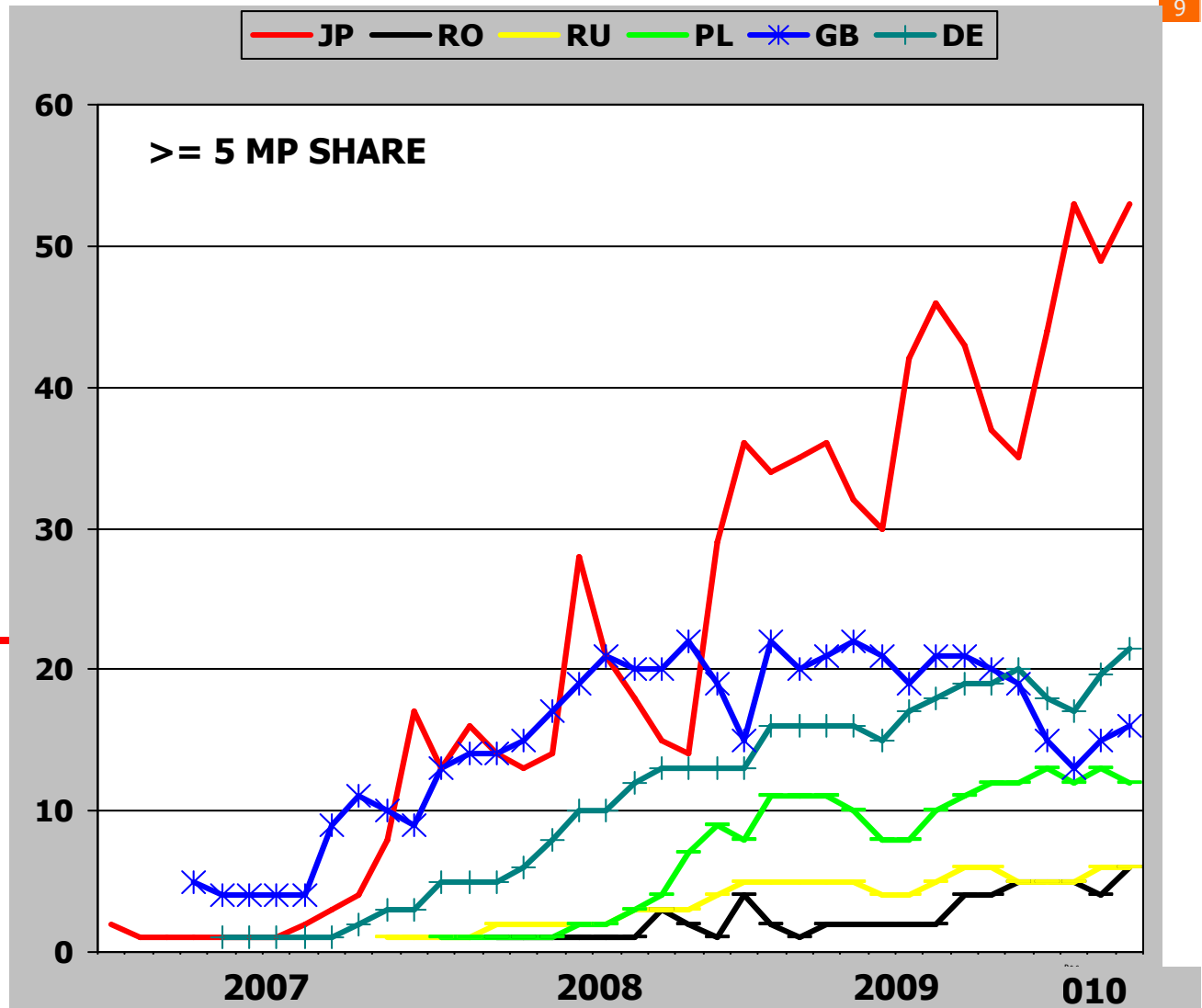
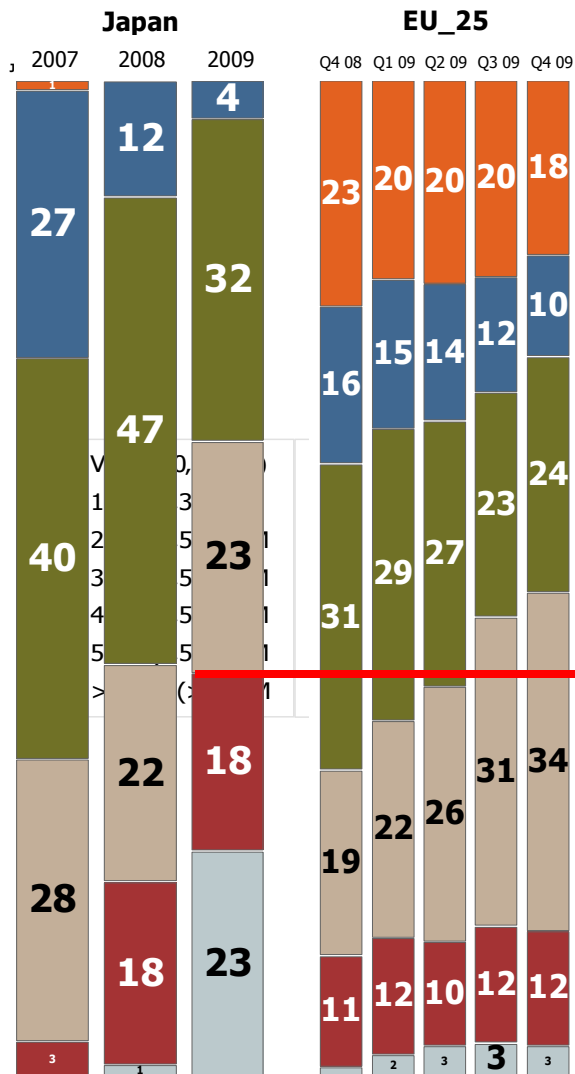
8



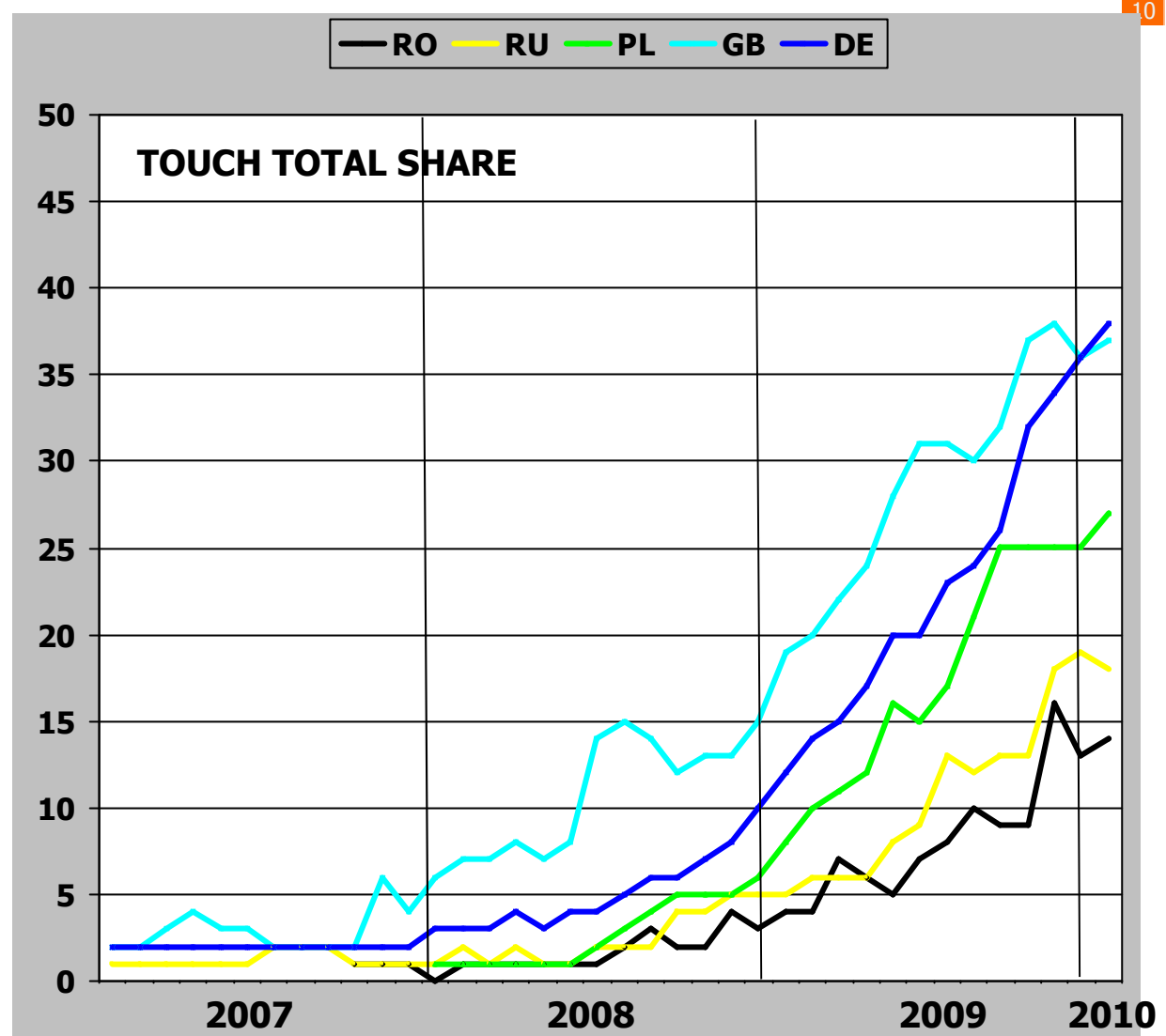
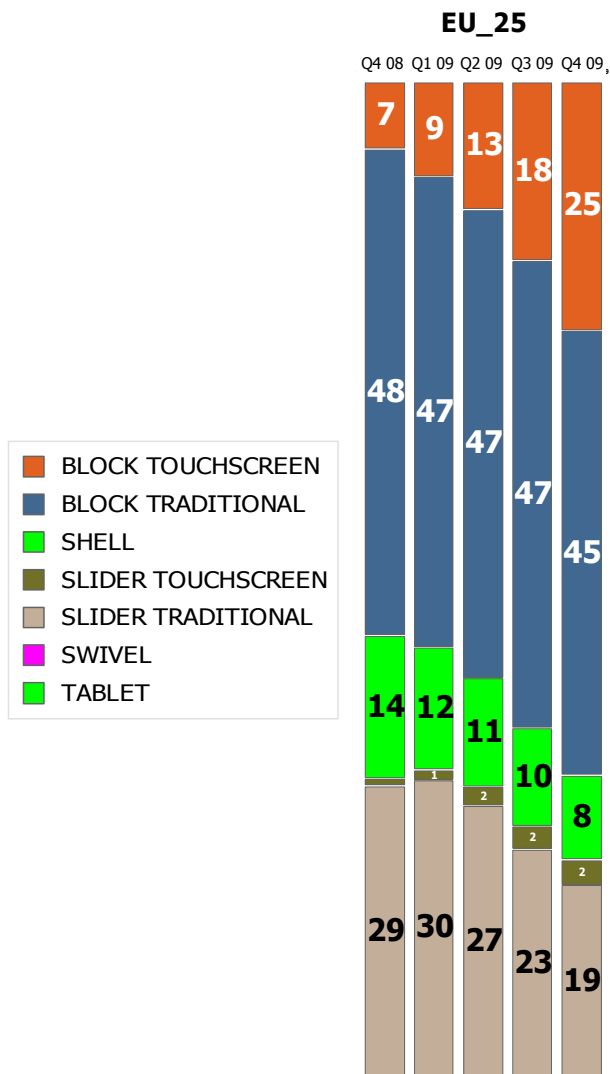
Mobile/Smartphones

Camera MegaPixel, share units%

Q4 08 – Q4 09



Mobile/Smartphones
Design, share units%
Q4 08 – Q4 09



Enablers....

SPEED



OPEN OS



GPS

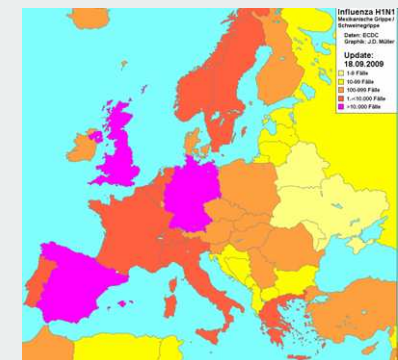


.... and future

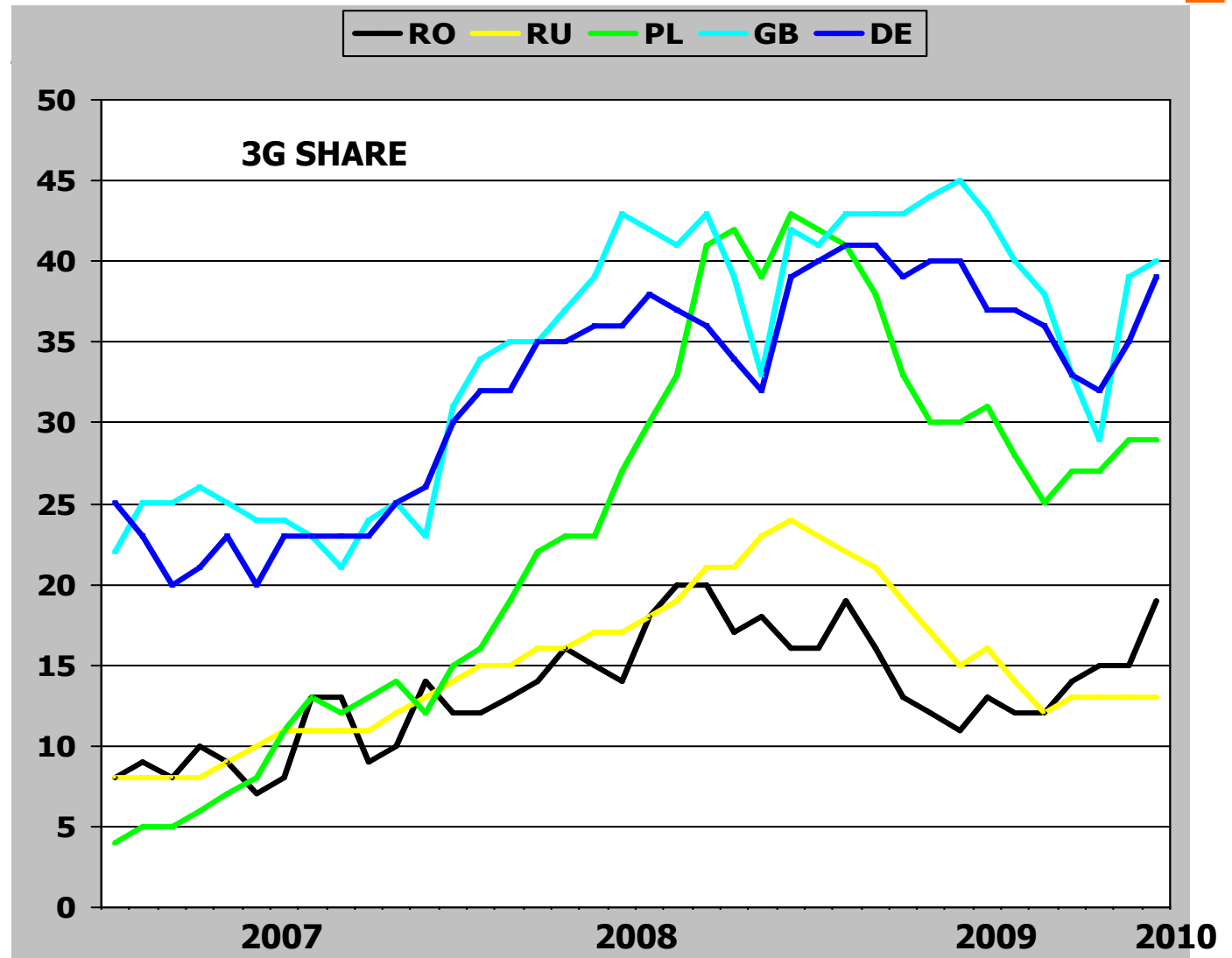
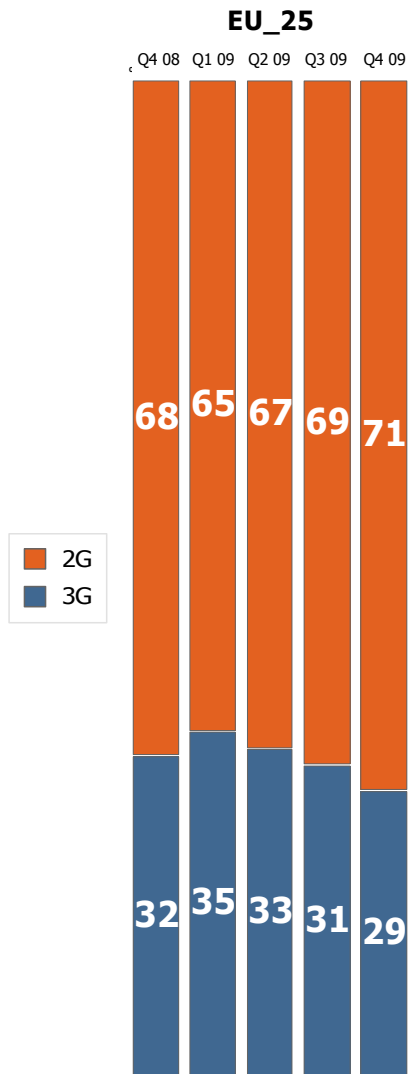
NEAR FIELD COMMUNICATION



SENSORIC



Mobile/Smartphones
2G vs. 3G , share units%
Q4 08 – Q4 09

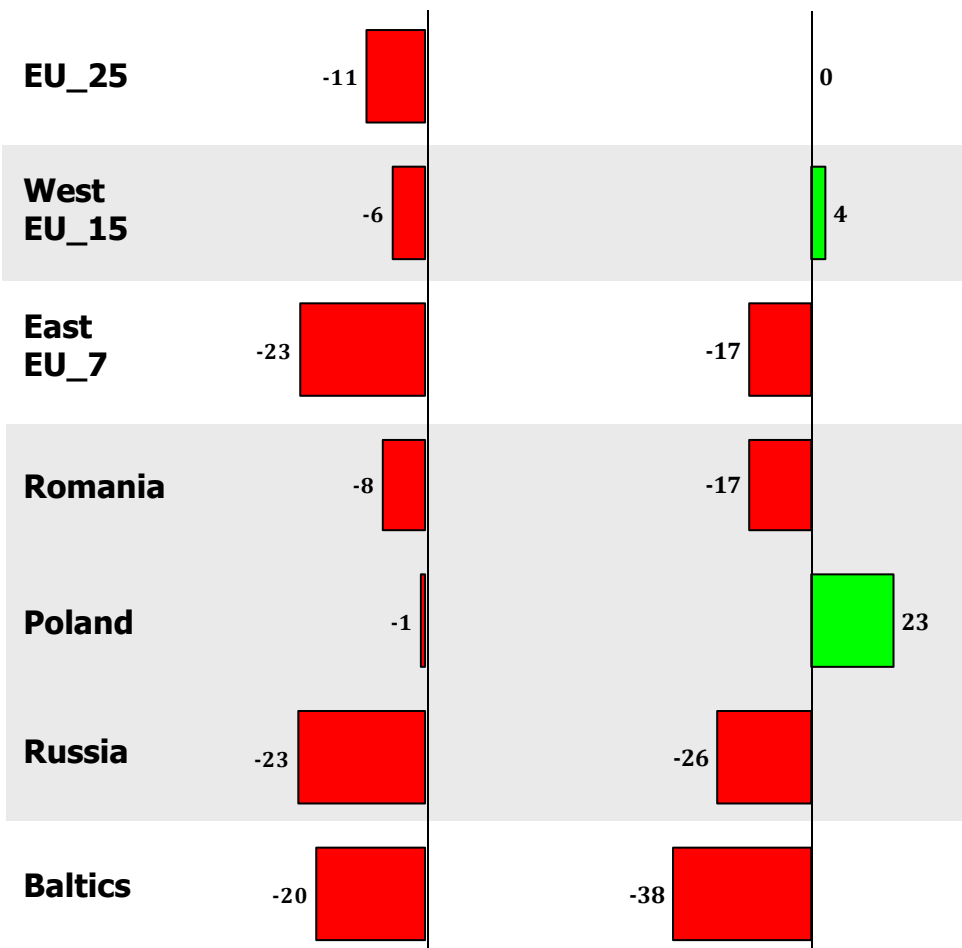


Mobile/Smartphones
Growth 2G and 3G , share units%
Jan 09 - Dec 09 (total market)

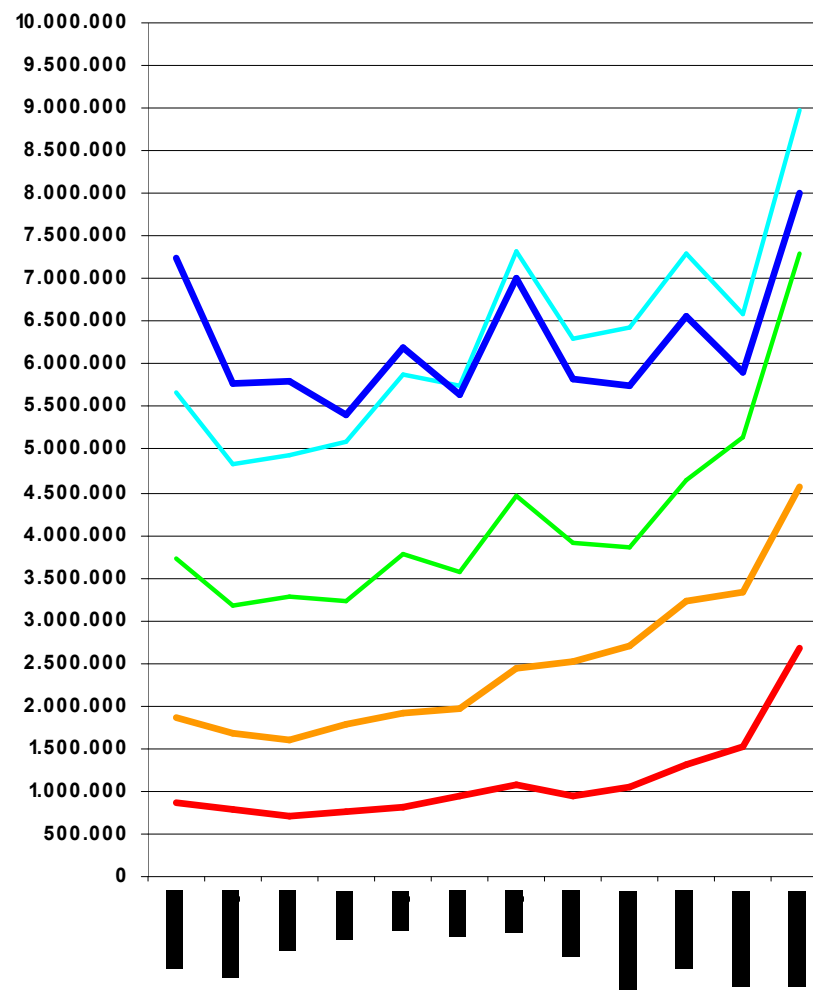
SPEED

2G Sales Units Growth
Jan-Dec 09

3G Sales Units Growth
Jan-Dec 09

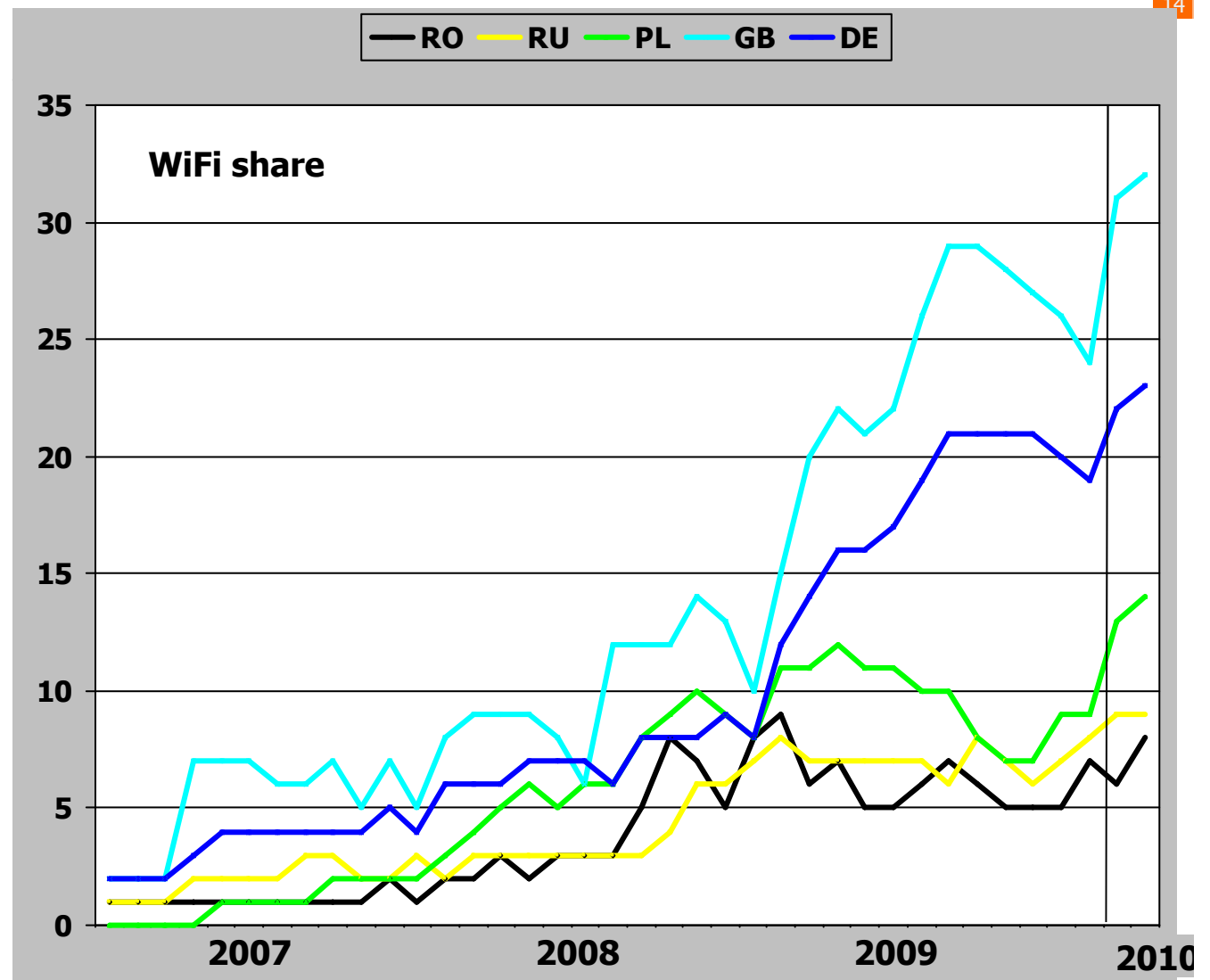
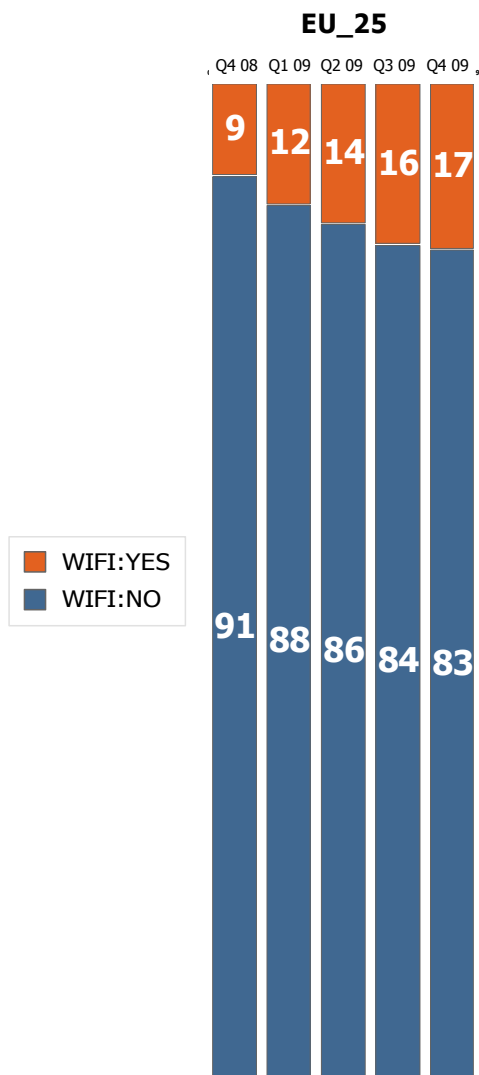


— 2005 — 2006 — 2007 — 2008 — 2009



Mobile/Smartphones
WiFi , share units%
Q4 08 – Q4 09

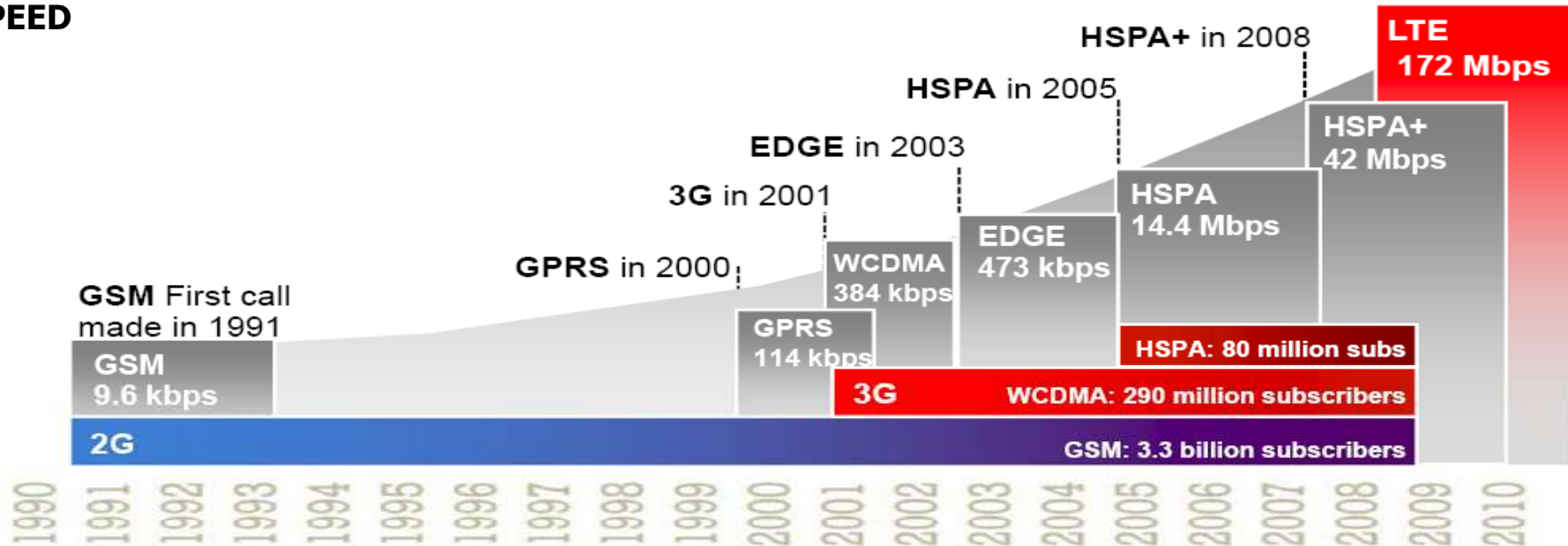
SPEED



SPEED

SPEED

15



Source: Wireless Intelligence, January, 2009

HSPA+ peak theoretical data rate reaches up to 42 Mbps when using single carrier with QAM 64 and 2x2MIMO

4G (LTE)

- First tests with 250 Mbits/s
- First chip with about 60 Mbits/s -> about 1 minute to download a complete video film
- LTE Advanced 2011/12 up to 1GB

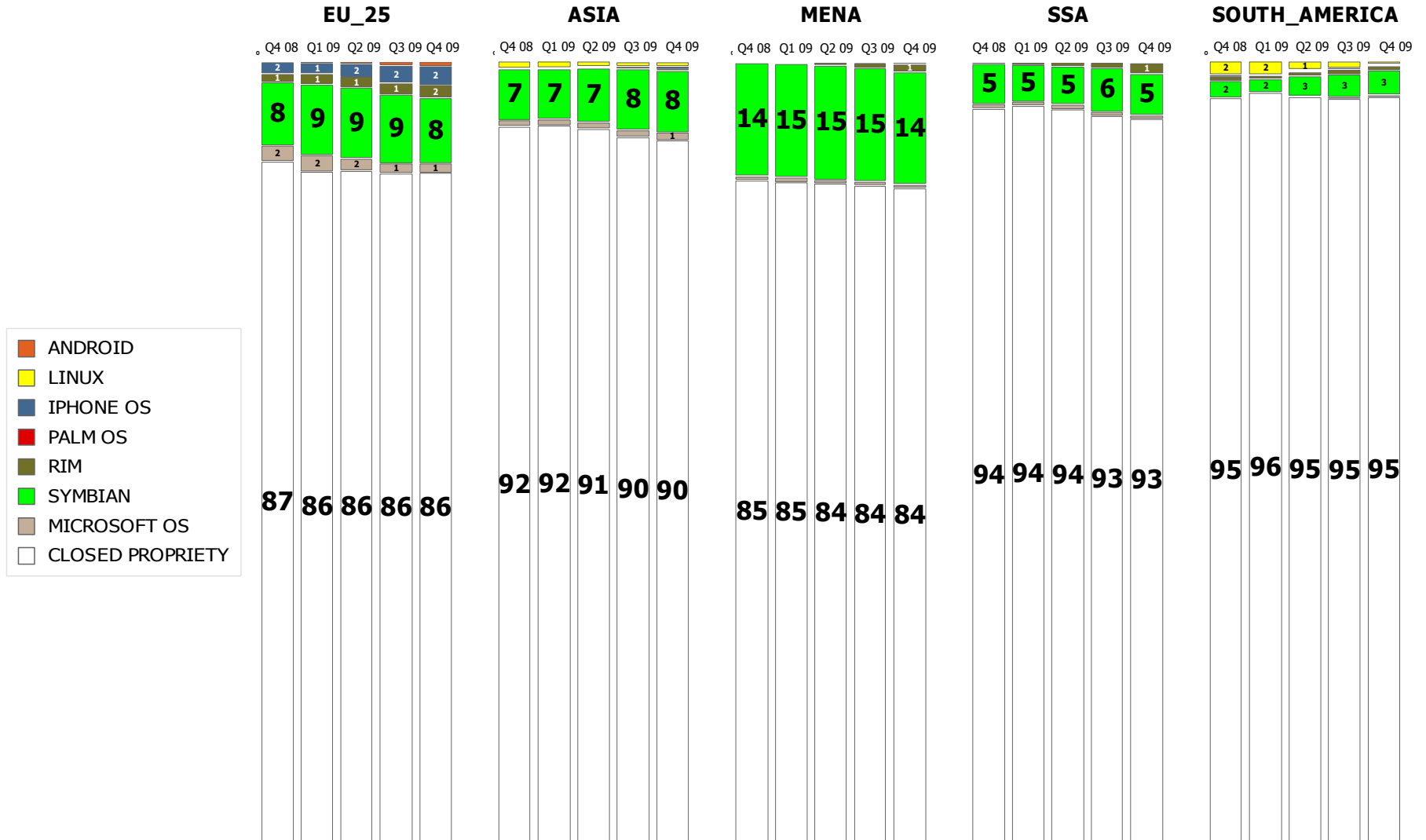


massive increase of mobile internet usage and traffic
-content download and always connected -



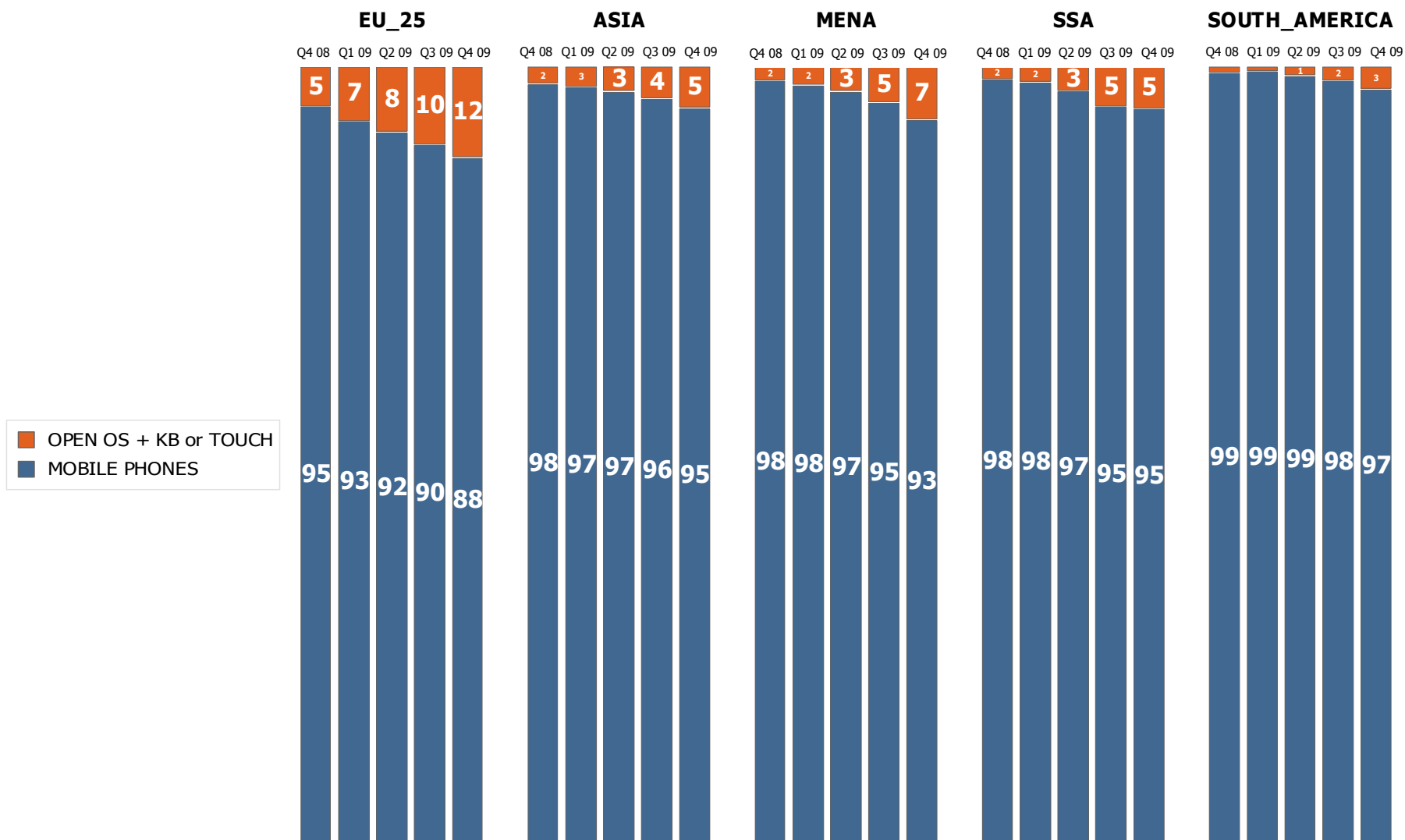
Mobile/Smartphones
Operating System , share units%
Q4 08 – Q4 09

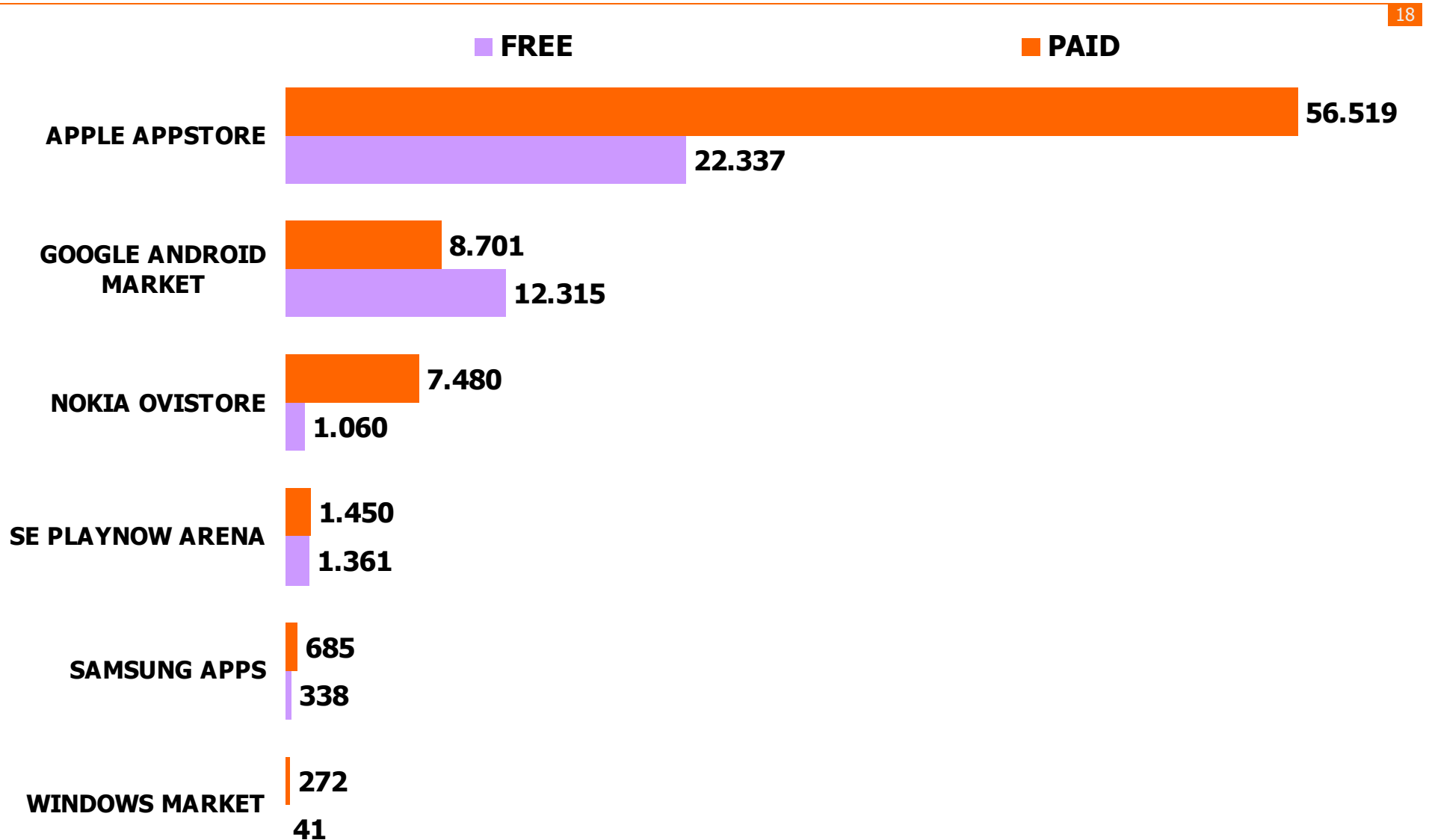
Open OS



Mobile/Smartphones

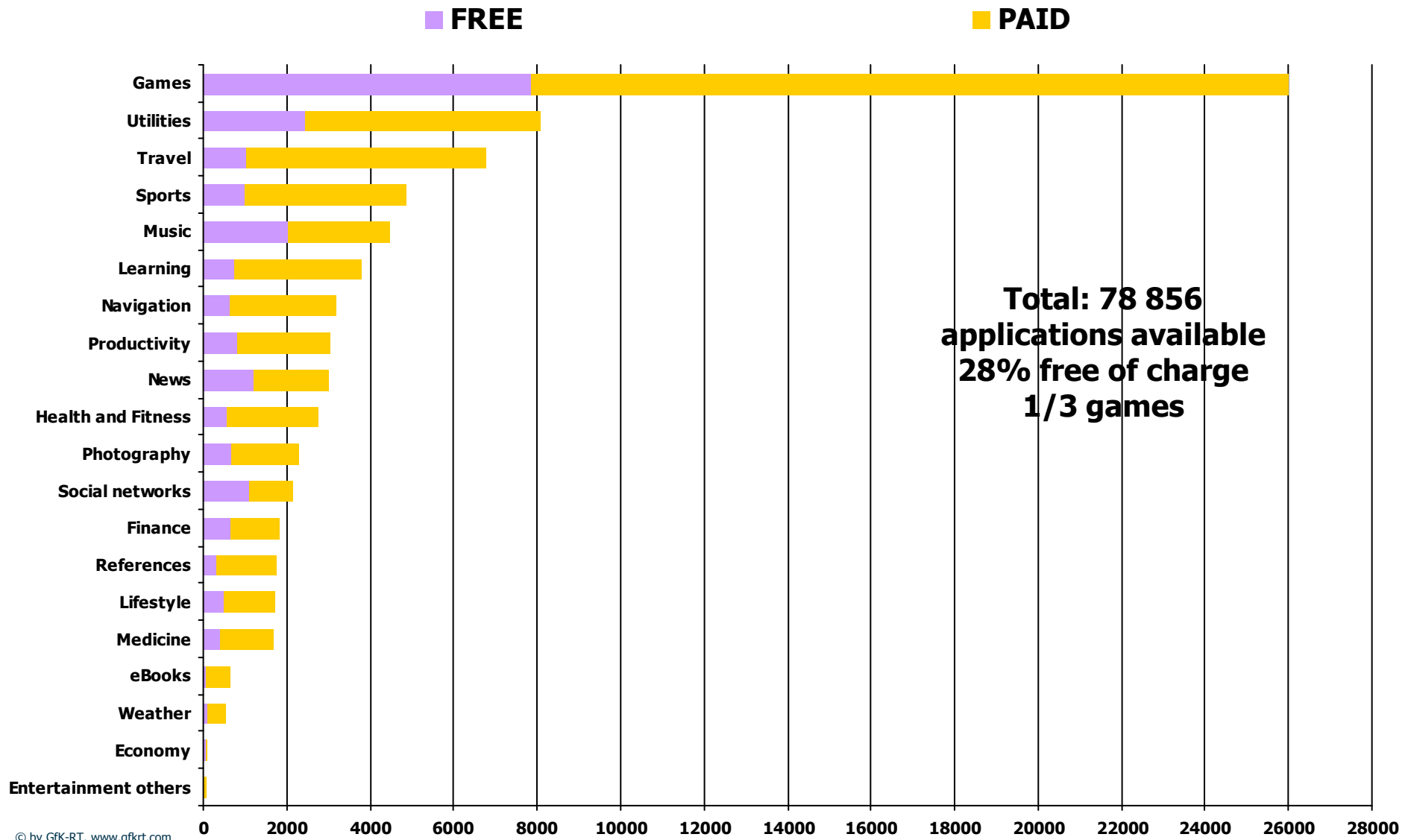
Open OS + Keyboard or Touch , share units%
Q4 08 – Q4 09



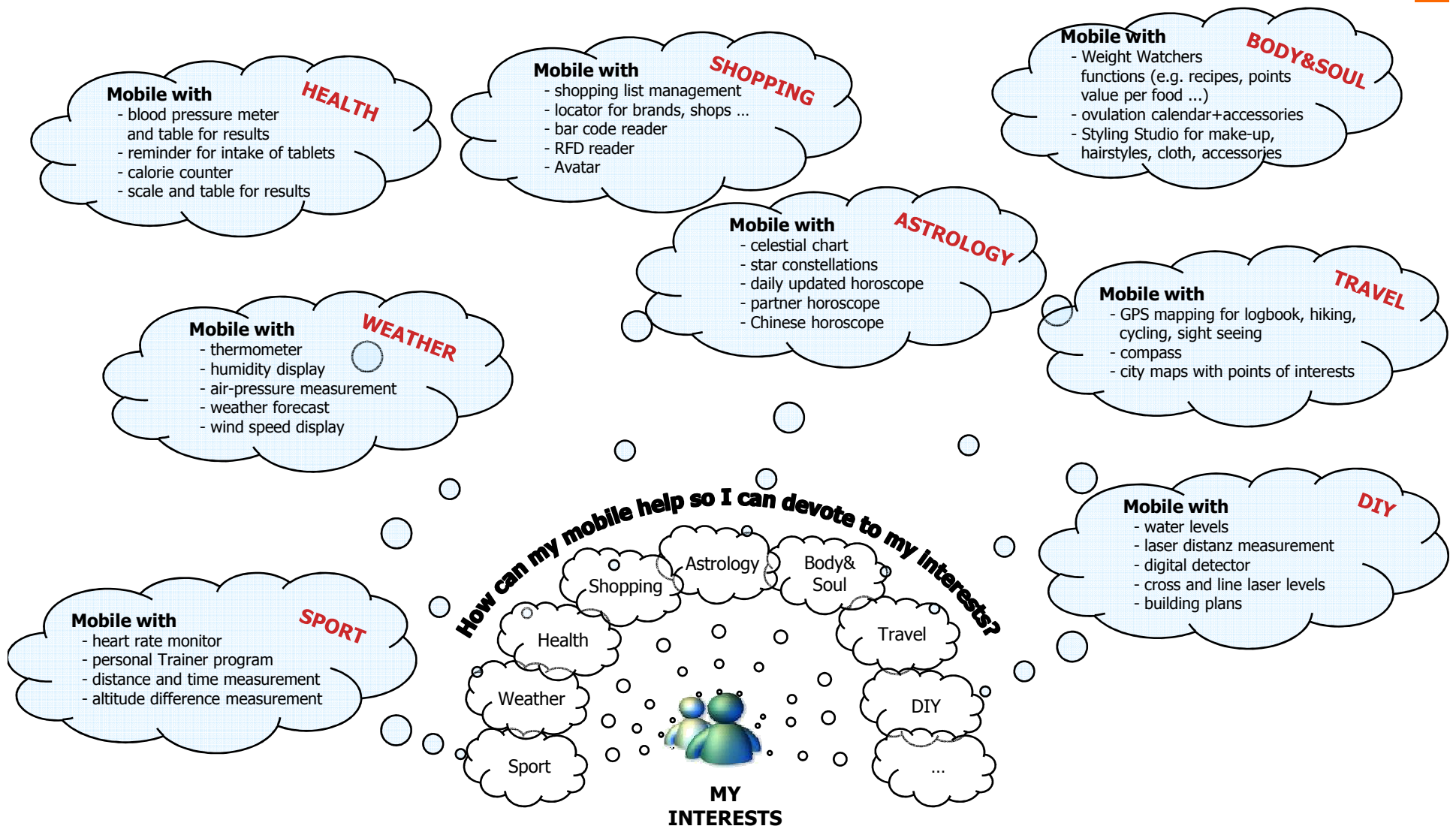
Apps for Smartphones: number of offered apps by store (week 03 Jan 2010)

Apps for Smartphones: number of apps by category on the Apple Appstore (week 03 Jan 2010)

19

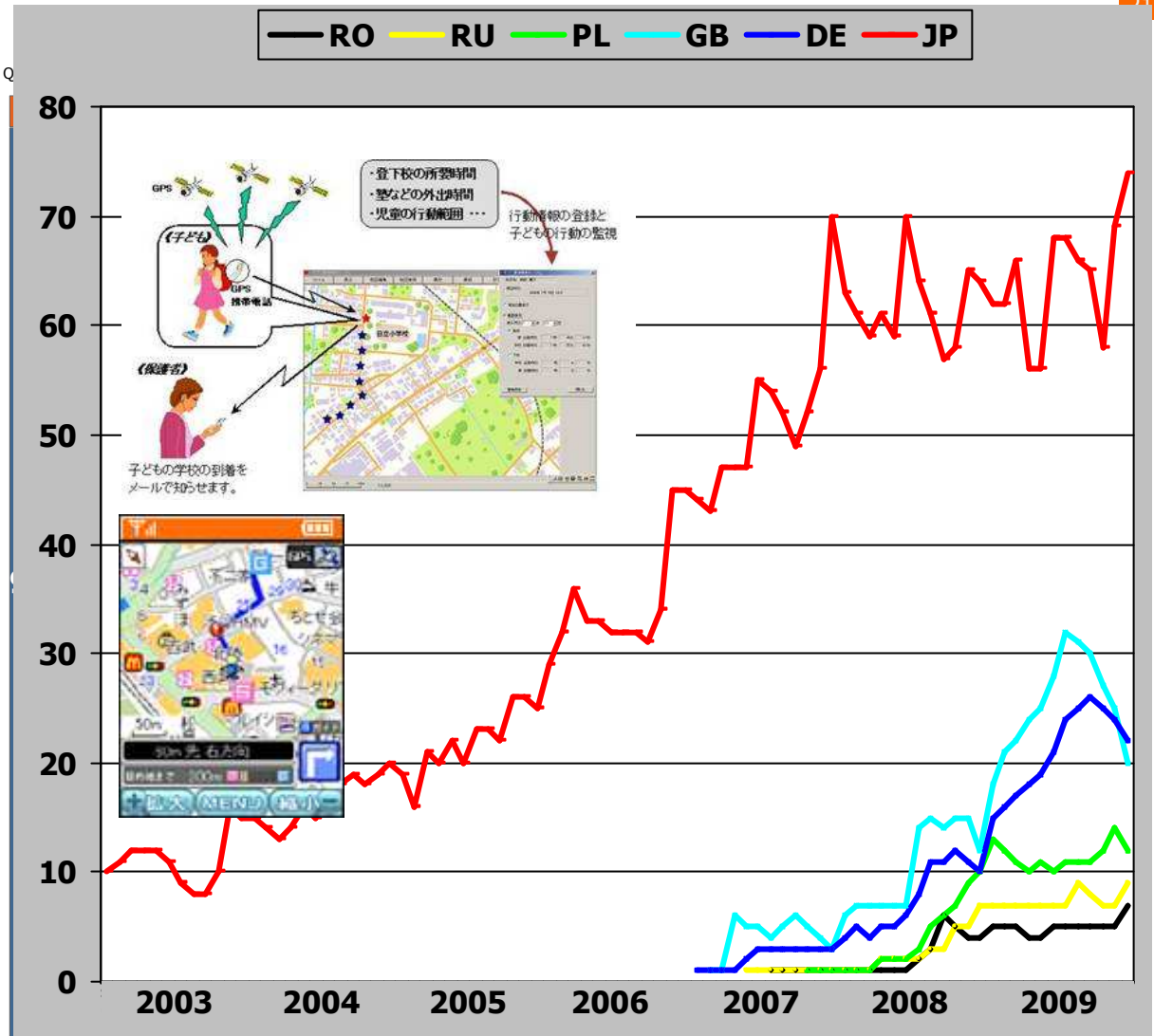
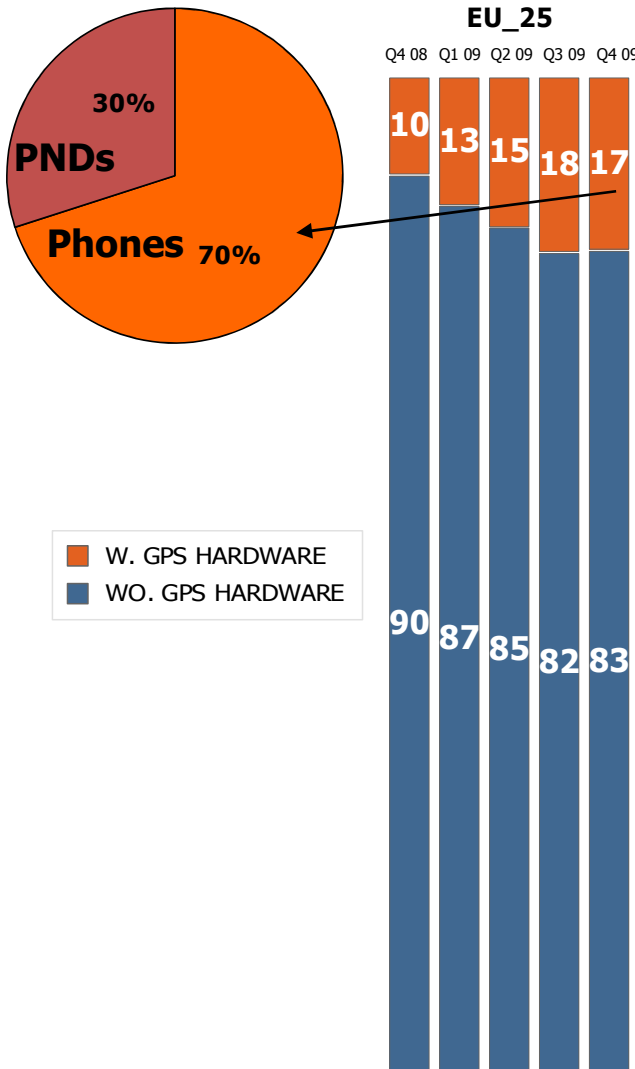


More opportunities? Smart packages of soft and hardware might generate more benefits for consumers than just a rate race on features and will help manufacturers to differentiate.



Mobile/Smartphones
GPS , share units%
Q4 08 – Q4 09

GPS



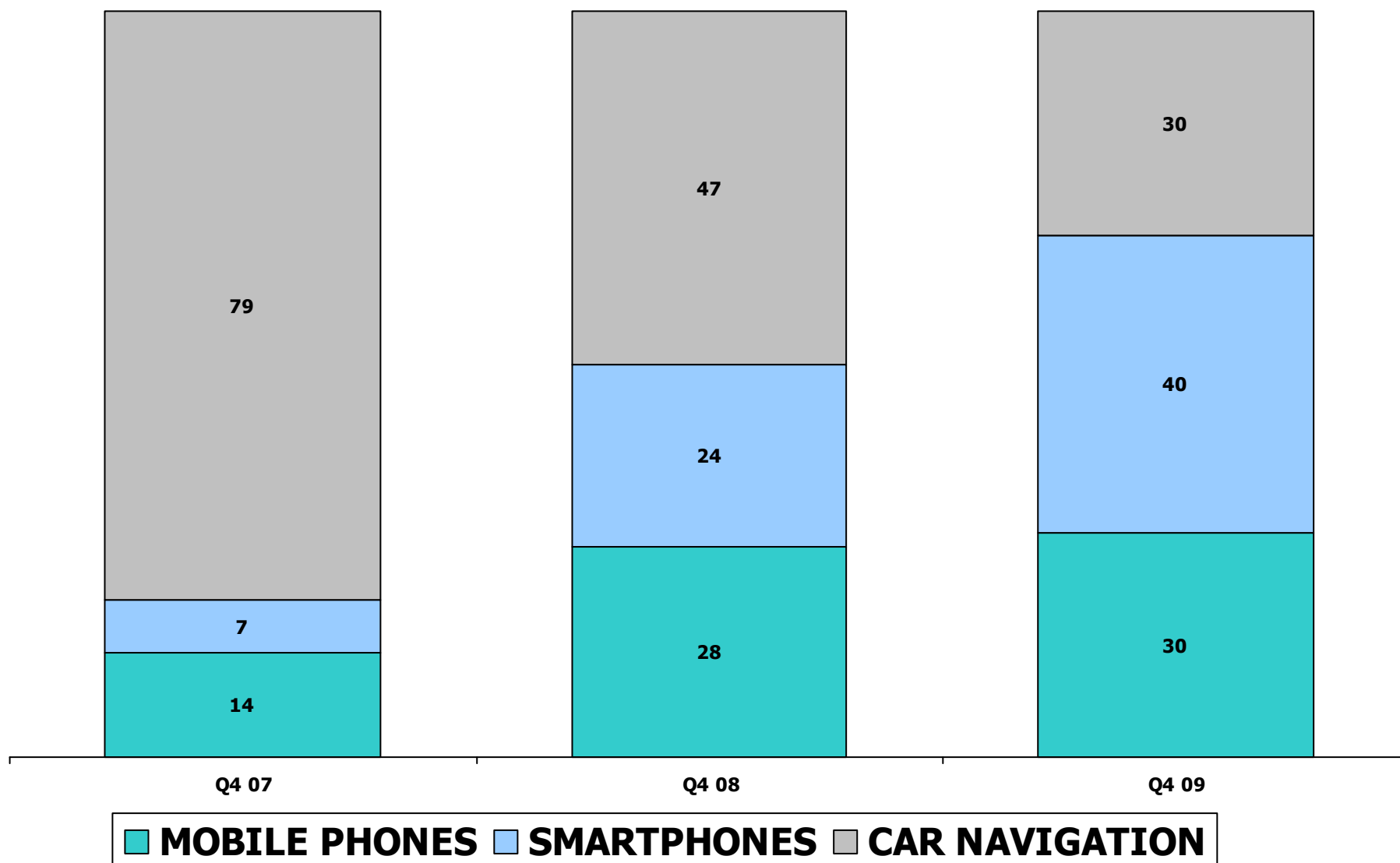
Mobile/Smartphones, Navigation

GPS EU15, share units%

Q4 07, Q4 08, Q4 09

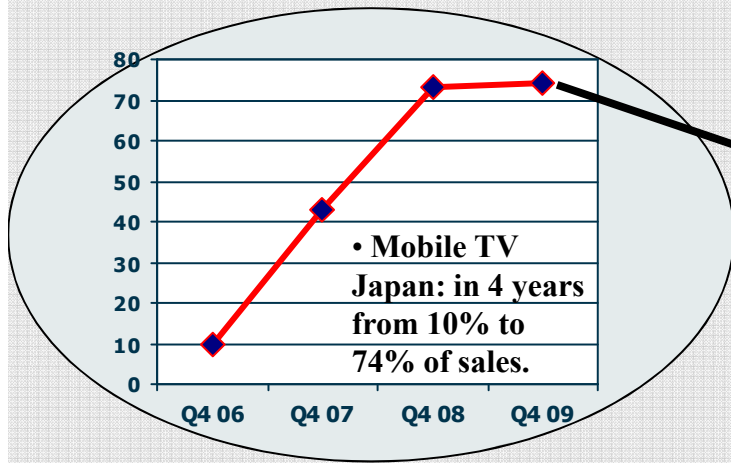
GPS

22

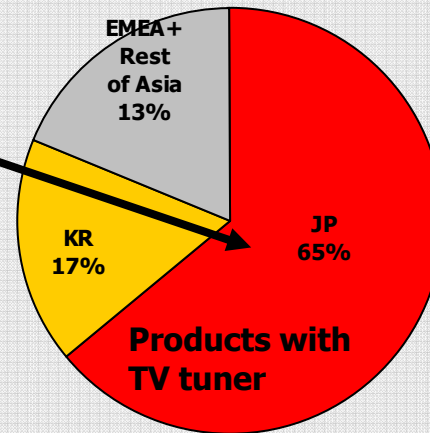


What might come later: mobile TV just a success in Japan and Korea so far.

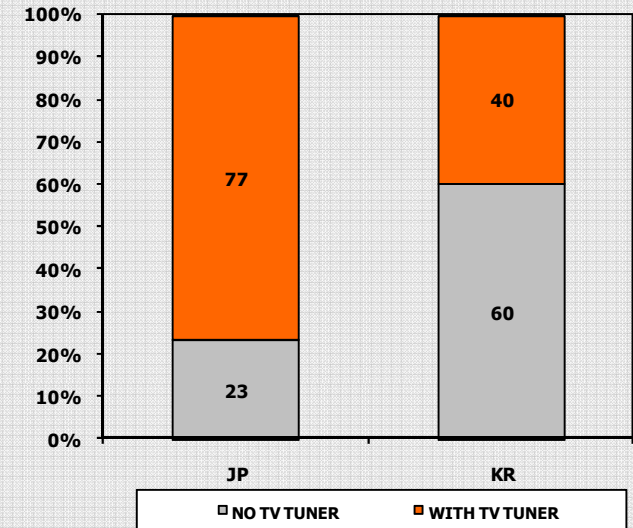
Mobile TV



Dec 09



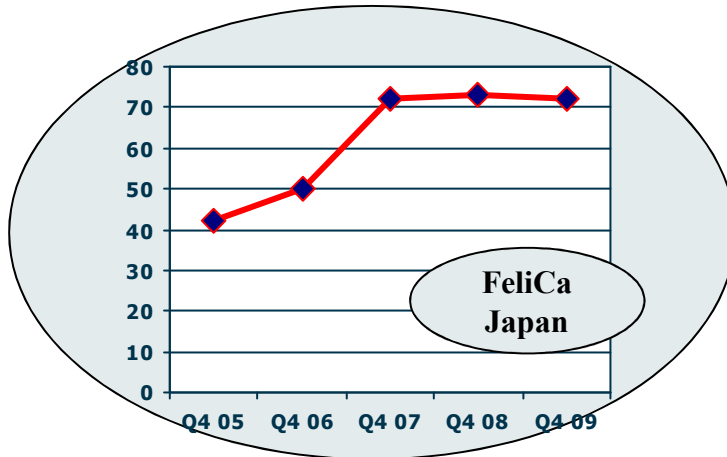
Dec 09, units share



NFC only a success in Japan so far.

24

Near Field Communication



Touch to

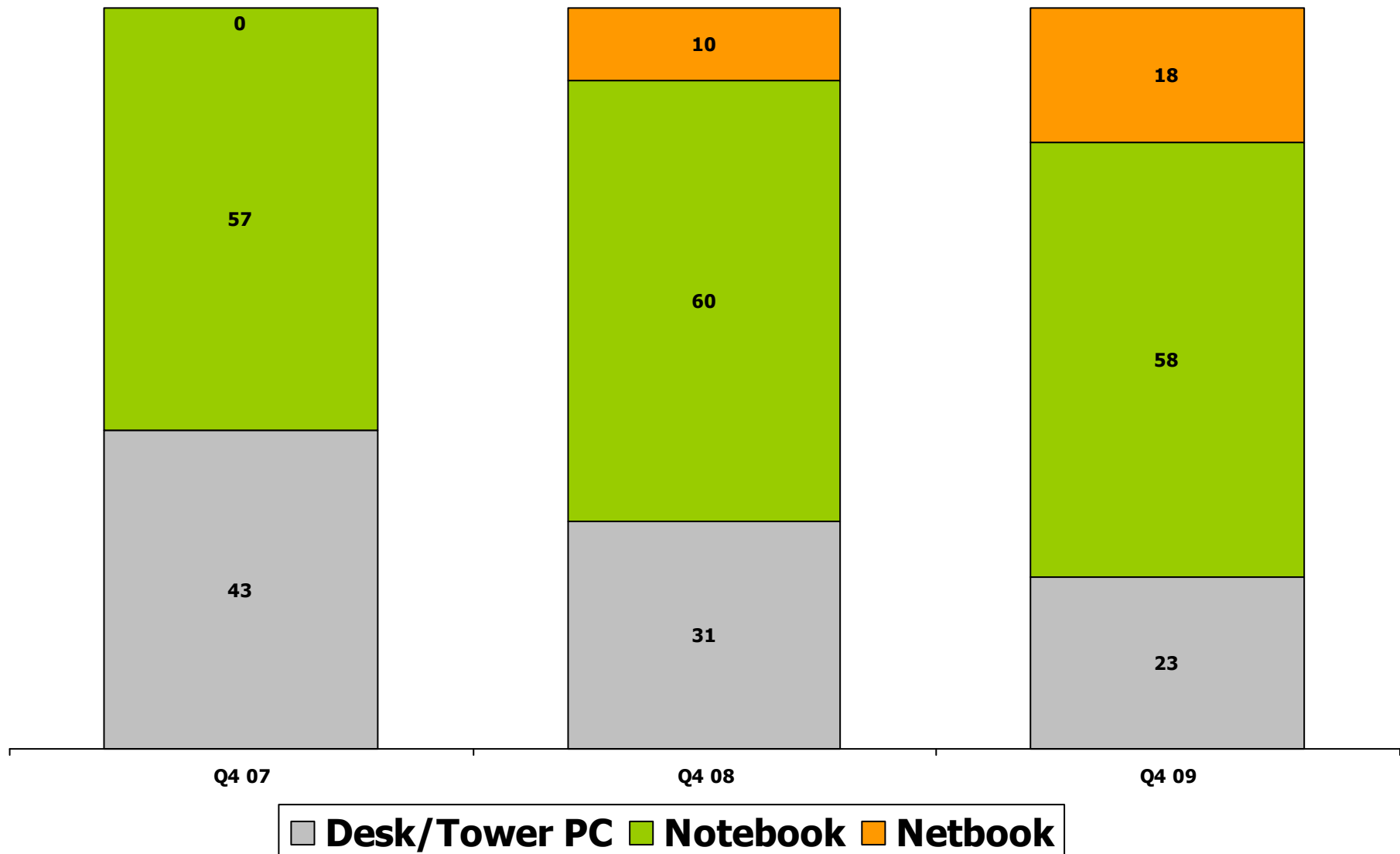
- pay
- ticket
- exchange information
-

Computers

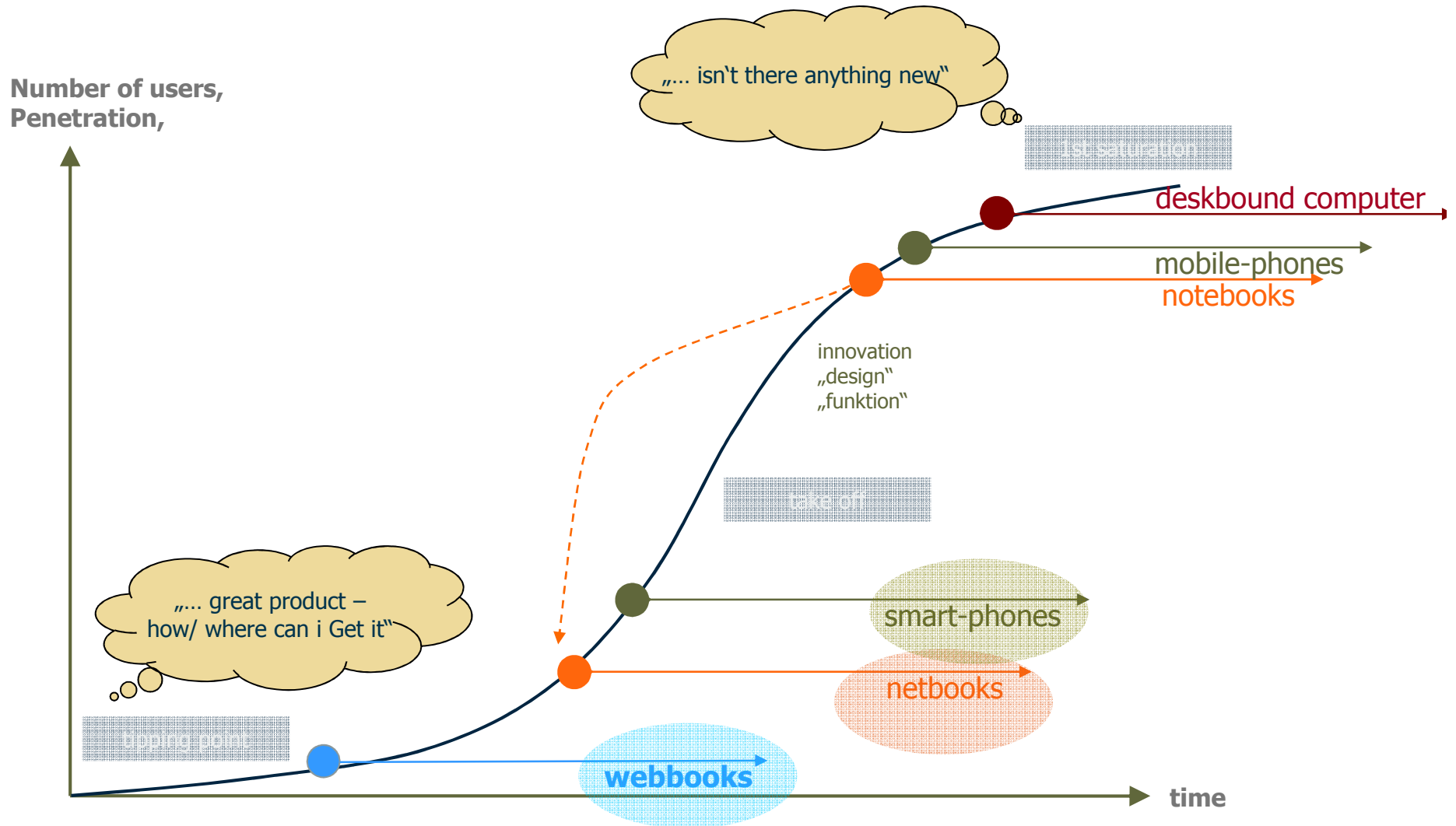
share units%, 20 CTR Retailer (b2c)

Dec 07, Dec 08, Dec 09

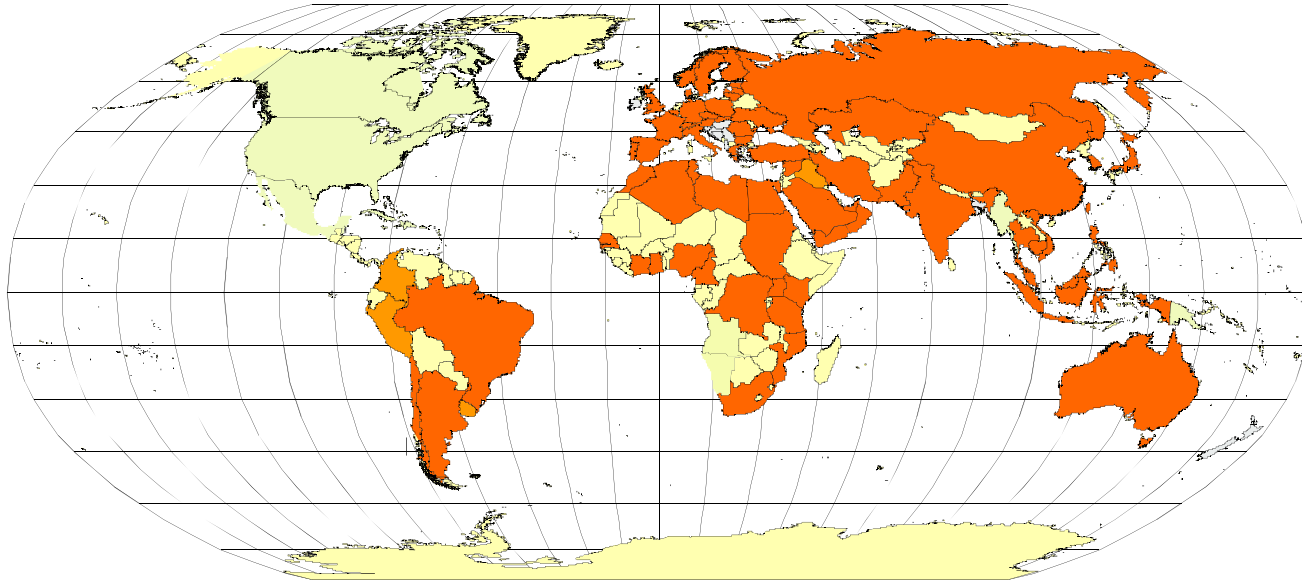
25



technologie-adoption



GfK Retail Tracking – 82 countries



to come in 2010:
■ Colombia (Q4)

Thank You