



Your connection to the digital consumer

Welcome to Mobile Broadband Americas

Mobile Television Track

Today's Agenda

8:45 – 9:00 Opening Remarks

9:00 – 10:00 Technology Selection: Evaluating Standards and Best Practices for Delivering Premium TV Broadcasts to Mobile Devices

10:00 – 10:40 Revenue Generating Mobile TV Business Models: Determining the Most Successful and Profitable Strategy

10:40 – 11:10 Break

11:10 – 12:10 Acquiring and Developing Compelling Content for Mobile TV

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Telephia Company Background

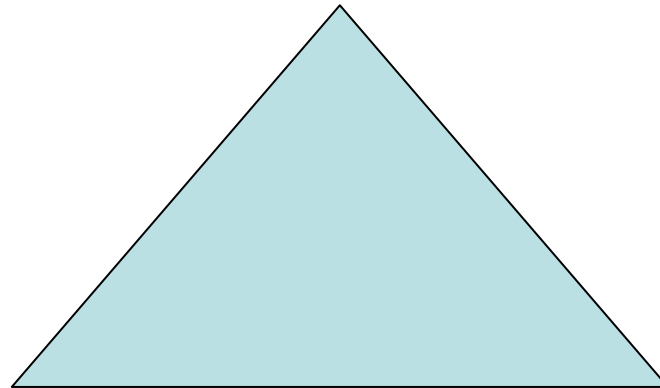
- Largest supplier of consumer research in communications & new media
- Measure everything about the consumer's use of digital connectivity, devices, & content
 - Mobile, portable, wired, voice, data, video
- Heritage in measuring the hyper-competitive U.S. mobile market
 - Serve every major market participant – many for 7 years running
 - \$10M+ average annual spend from each national service provider
 - Only source for POS data and embedded on-device metering

Consumer Behavior

Network Signal Polling
Internet Bill Panel
On-Device Meter Panel

Consumer Attitudes

Internet Surveys
Phone Surveys
Focus Groups



Consumer Experience

Network Testing Fleet
Application Testing Nodes
Mystery Shopping

Overview of Mobile Television Systems

Technology Selection: Evaluating
Standards and Best Practices for
Delivering Premium TV Broadcasts to
Mobile Devices

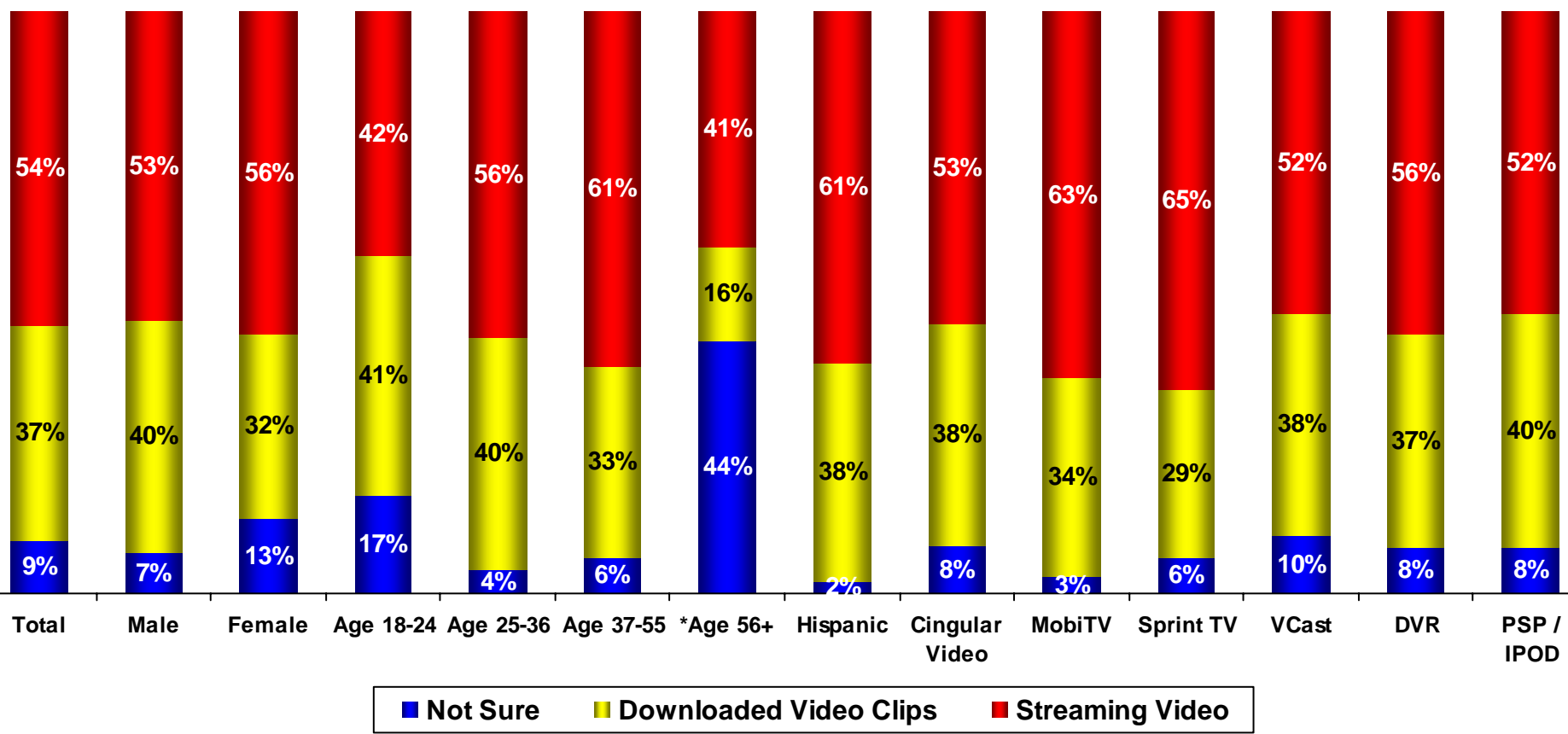
Current and Future Systems Overview

	United States						
	MobiTV	Sling Player Mobile	GoTV	V-Cast	Modeo	MediaFLO	HiWire
Type	Streaming, Interactive	Remote control of home DVR	Mobile DVR/VOD	Video Clips/VOD	Broadcast	Broadcast	Broadcast
Geographies	US, Europe	Worldwide	US	US	US	US	US
Technology	2.5G, 3G, IP	3G, IP	2.5G, 3G, IP	3G	DVB-H 1.7GHz	Qualcomm FLO	DVB-H 700 mHz
Expected Launch	Launched	Launched	Launched	Launched	2007	2007	
Price	\$19.99/mo + unlimited data package + 3G handset	Unlimited data package + 3G Windows Mobile Handset	Varies	\$10 Video only \$15 Vcast Vpak	\$10-\$15 + new handset	\$10-\$15 + new handset	
Channels	50+	Based on Home Cable	15 - 50	35	15 - 50	15 - 50	
Champions	MobiTV	Sling Media	GoTV	Verizon	Crown Castle	Qualcomm	Aloha Partners

	Rest of World			
	DVB-H	ISDB-T	DMB	MBMS (3G)
Type	Broadcast	Broadcast	Broadcast	Broadcast
Geographies	Europe, Parts of Asia	Japan	Korea, Possibly Europe	Worldwide
Technology	OFDM	OFDM	OFDM	W-CDMA
Expected Launch	2007	Launched?	Launched	Launched?
Price	\$10-\$15 + new handset	?	?	?
Channels	15 - 50	15 - 50	15 - 50	15 - 50
Champions	T-Mobile, O2, KPN, Vodafone, Sonera, Telstra	Japanese Broadcasters	Korean Broadcasters	Vodafone

There is a strong preference for streaming video when compared to downloaded video clips.

Streaming Video versus Downloaded Video



M800: There are two ways that you can view Mobile TV and video on your cellular phone - Streaming video; where video is displayed on phone in real time...identical to your normal TV viewing experience at home where you select channels to watch and view live TV broadcasts or, Downloaded video clips; where you download individual video files to your phone and then view them. Please select the method of video you prefer:

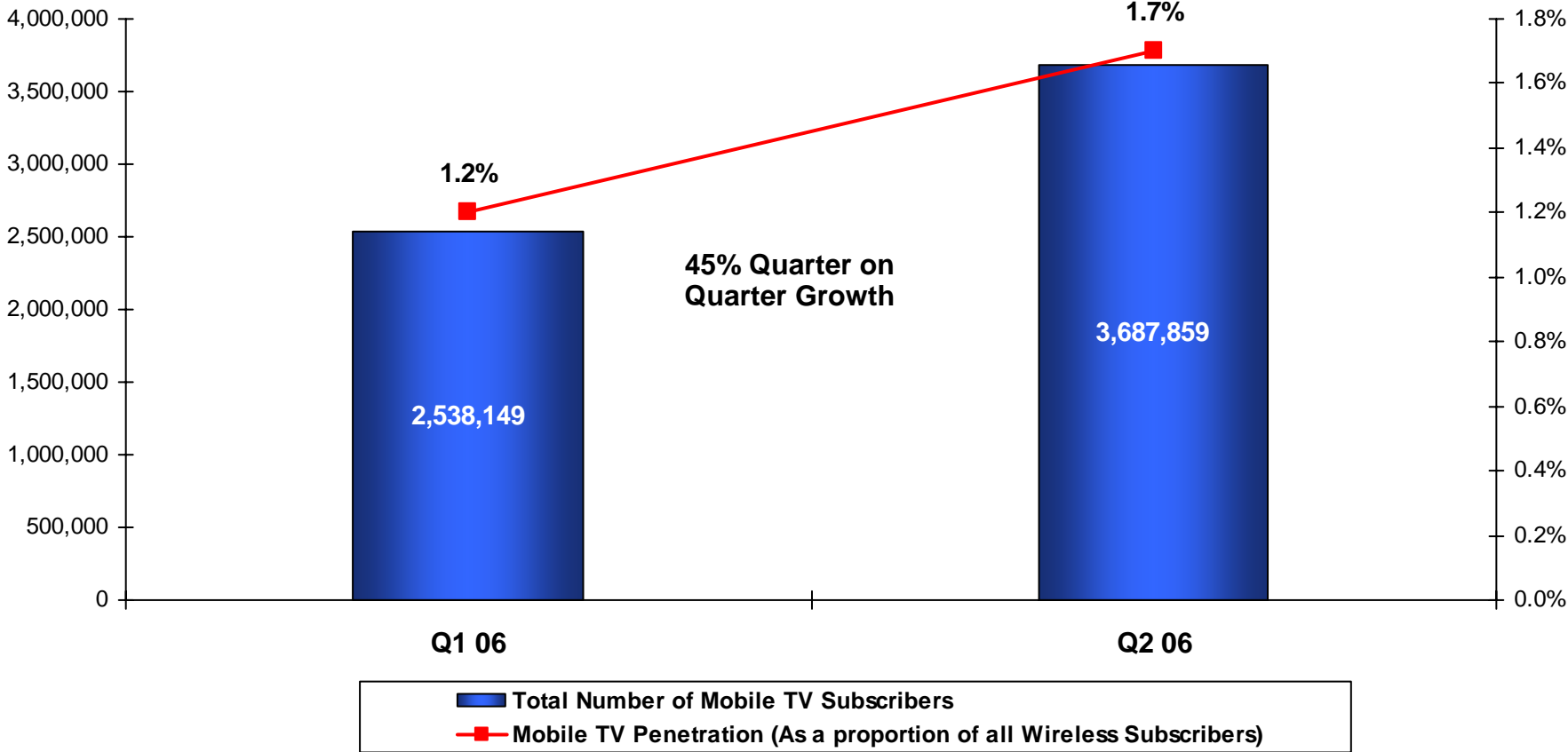
* Small base size of less than 30

Revenue & Adoption of Mobile TV

Revenue Generating Mobile TV Business
Models: Determining the Most
Successful and Profitable Strategy

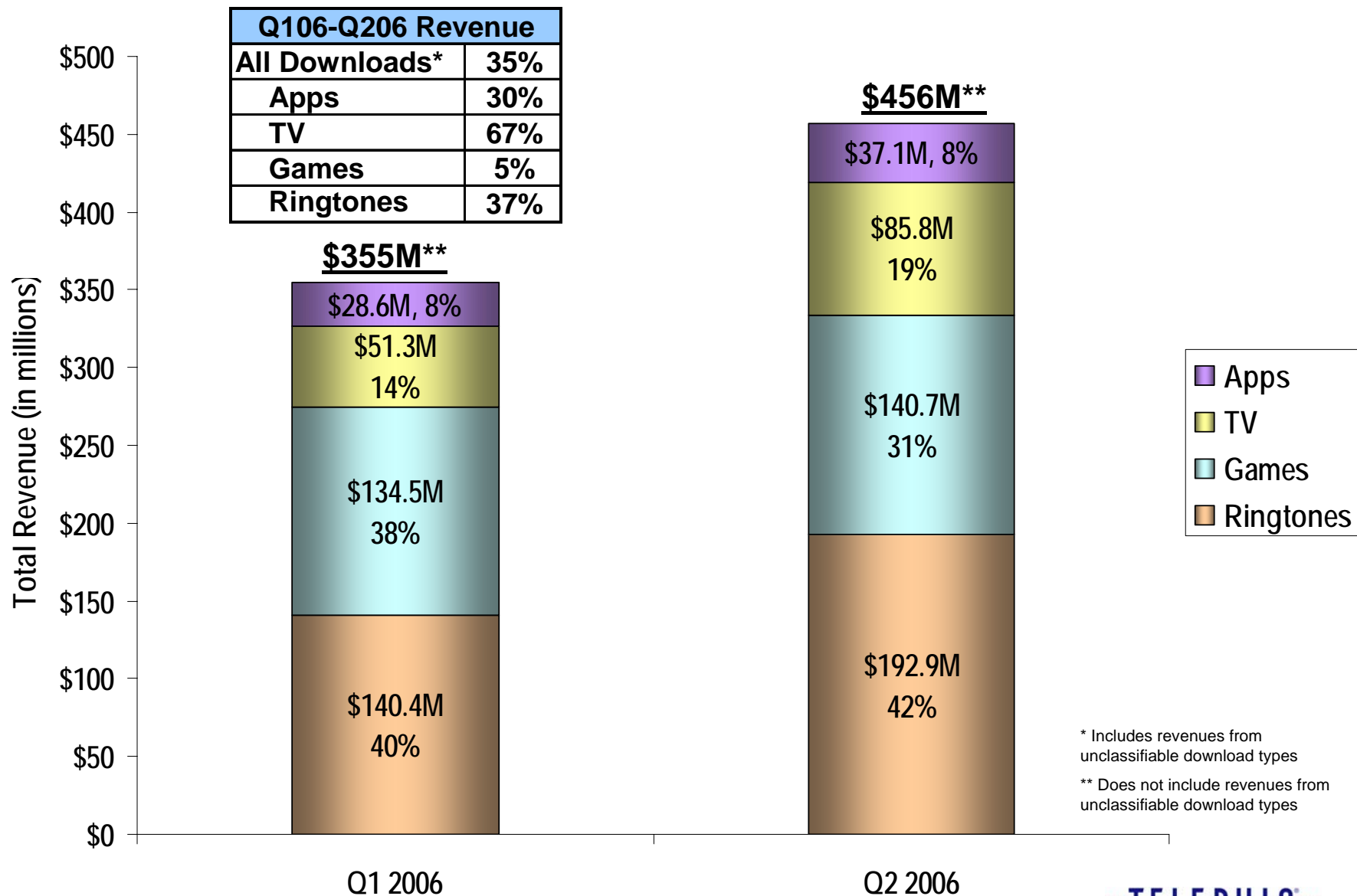
Mobile TV subscribers grew at an impressive 45% between Q1 and Q2, 2006.

US Mobile TV Subscriber Growth



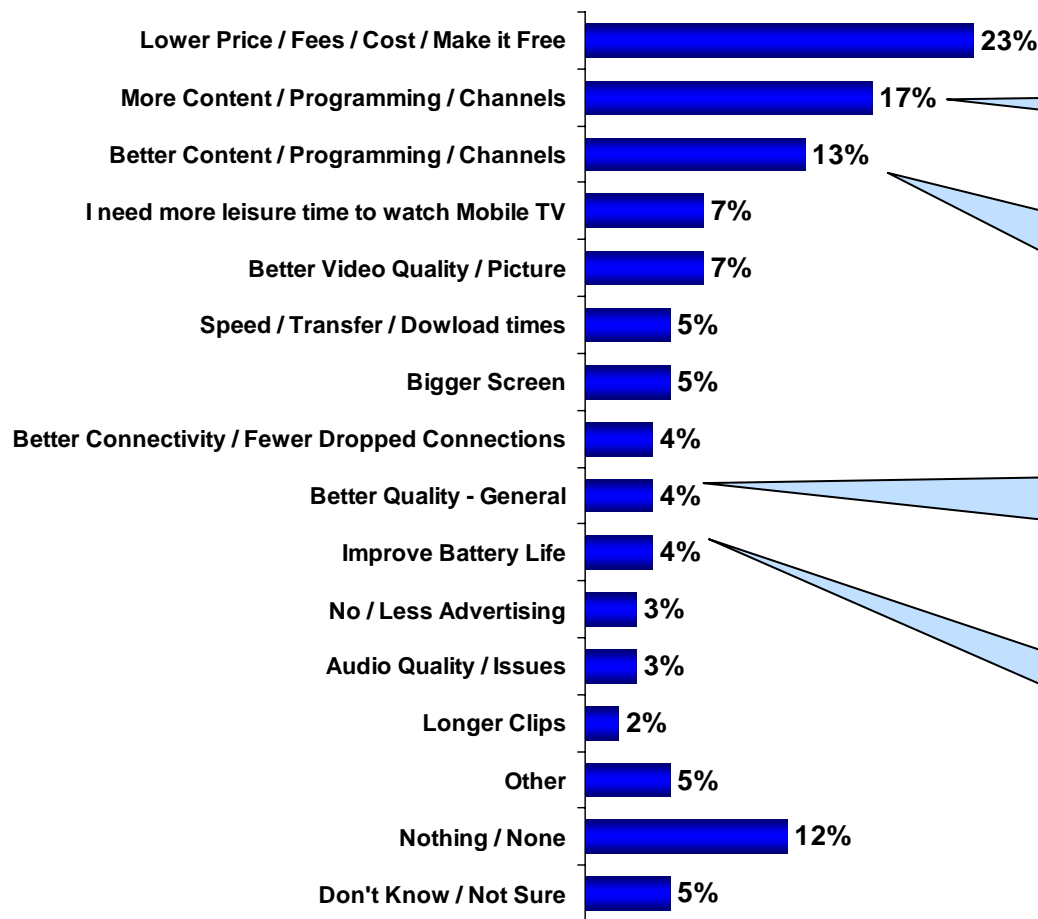
Source: Telephia estimates based on survey product and bill panel data

Video share of revenues growing rapidly



A quarter of Mobile TV users indicate they would watch more if it were less expensive. One in five say more content would increase their viewing

Motivators for Increased Mobile TV Usage



Verbatim Comments

"More channel selections at a cheaper price and better connections."

"More Cable TV content would be really cool! It might even soften my attitude towards advertising if this happened."

"Improve video and audio quality and video-audio integration and take the advertising off of the front and integrate it into the download or allow us to skip it!"

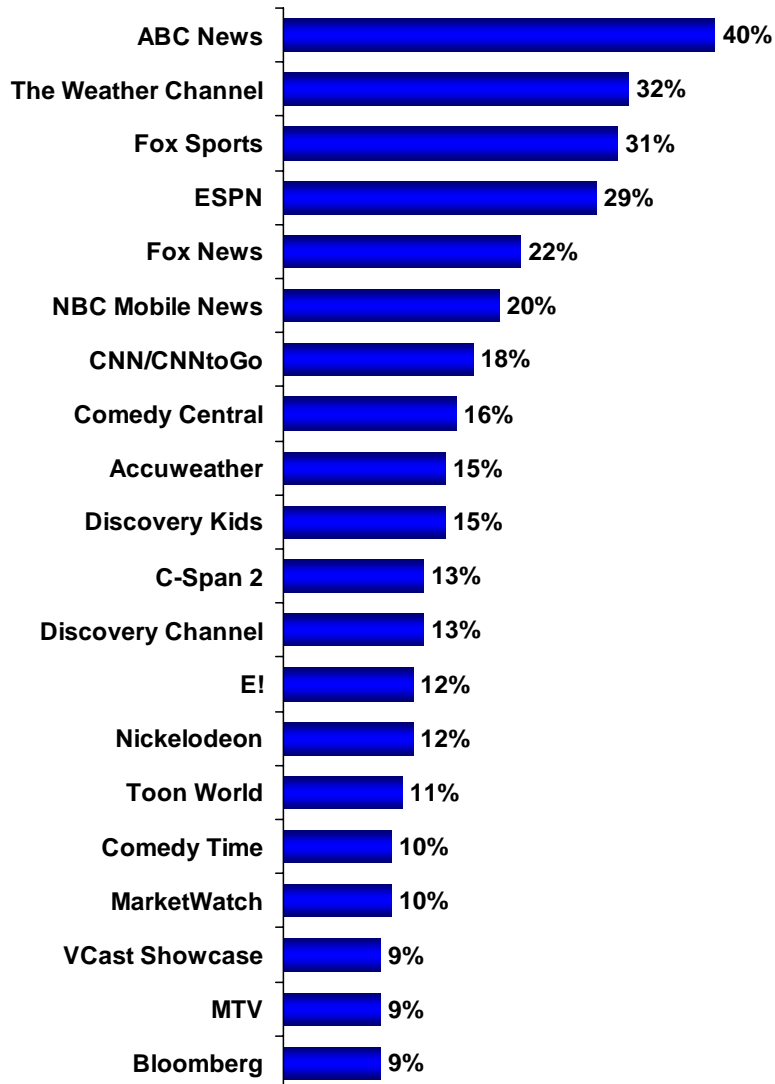
"If the experience is smoother, takes less battery power, and there's no added cost."

Mobile Television Viewership

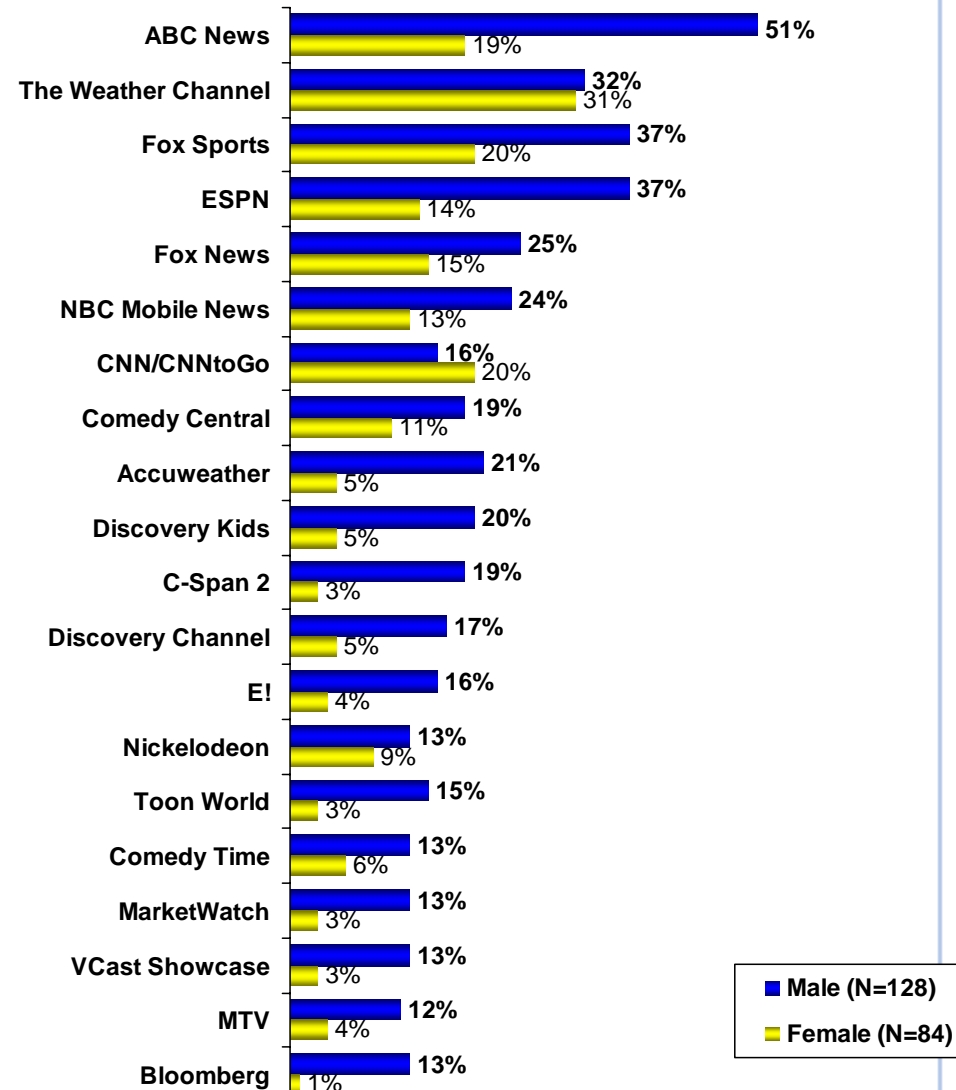
Acquiring and Developing
Compelling Content for Mobile TV

ABC News, The Weather Channel, Fox Sports and ESPN are the most popular mobile TV channels.

Total Audience – Popular TV Channels



Total Audience – Popular TV Channels by Gender



■ Male (N=128)
■ Female (N=84)

Video viewers don't just watch for a minute or two

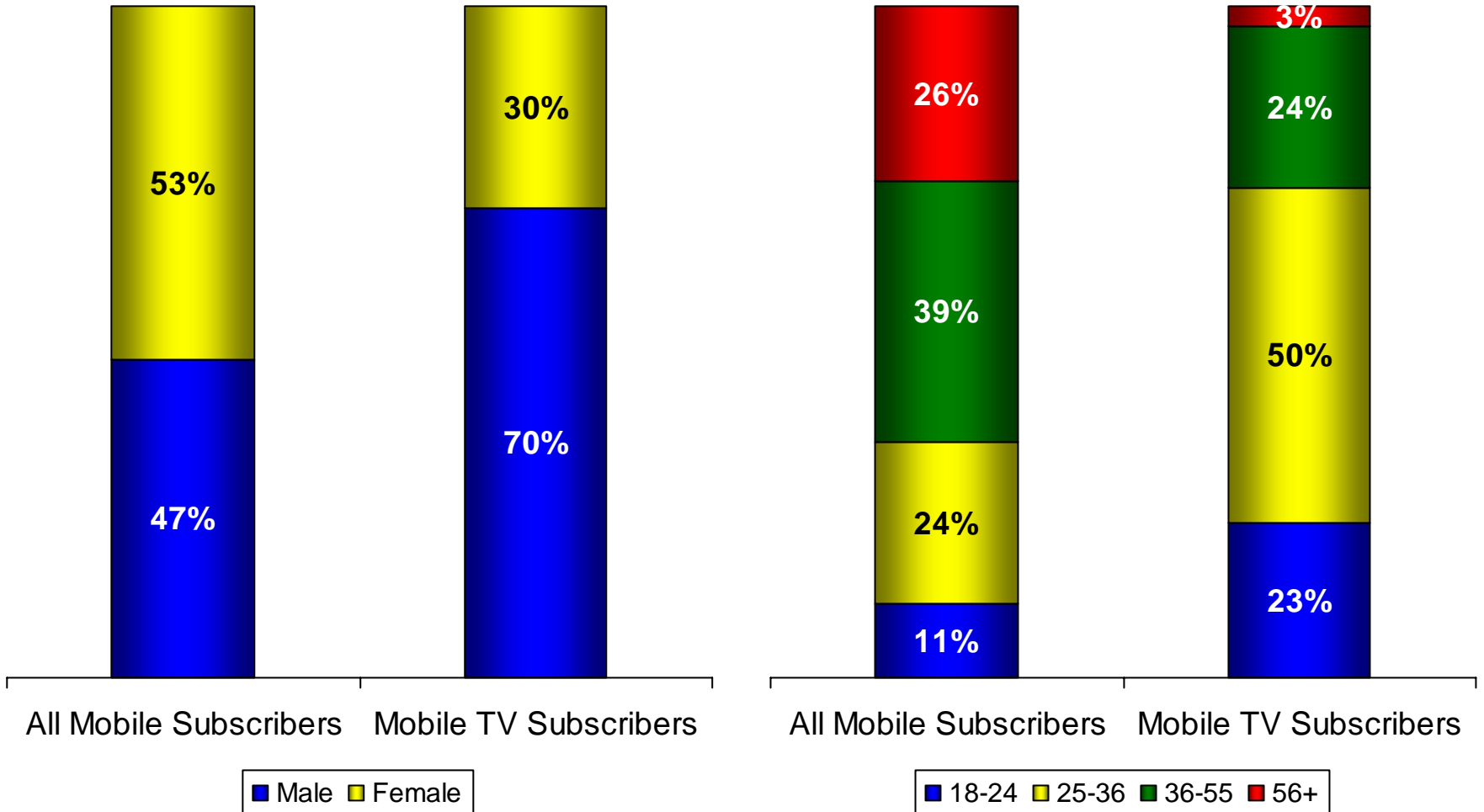
Mobile TV Users (N=310)

	Total	Male	Female	18-24	25-36	37-55	Hispanic
Base Size (n)	310	189	121	37	139	115	45
Less than 5 min	18%	13%	30%	28%	11%	18%	12%
5 to <10 min	23%	23%	23%	18%	24%	25%	24%
10 to <15 min	18%	20%	14%	9%	27%	9%	17%
15 to <30 min	19%	19%	18%	30%	17%	15%	13%
30 min to <1 hour	8%	8%	7%	4%	8%	11%	16%
1 hour to <2 hours	4%	5%	1%	--	3%	11%	10%
2 hours or more	11%	12%	8%	11%	11%	12%	9%

Three-fourths of mobile video users over 24

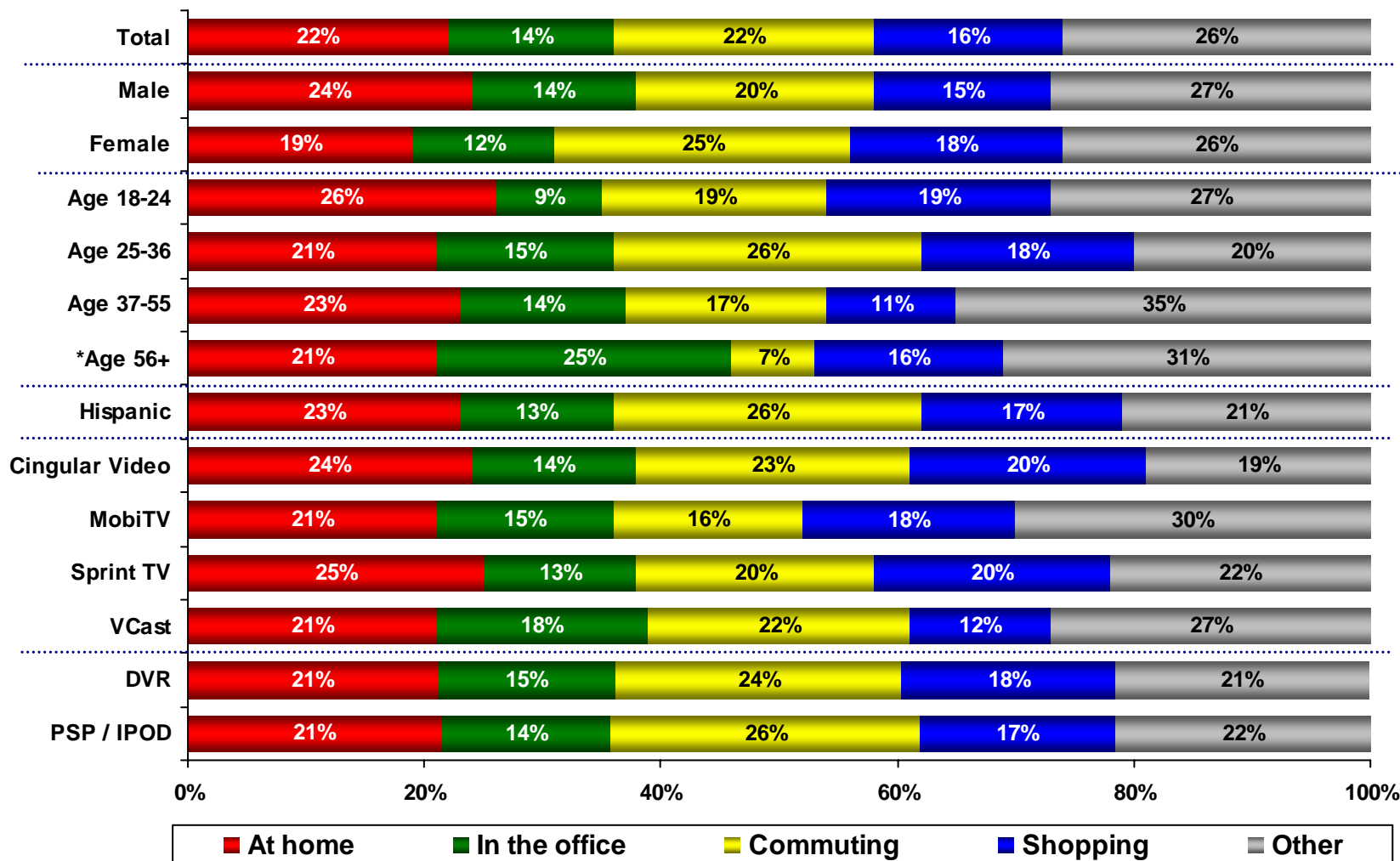
Mobile TV Users (N=310) / General US Mobile Subscribers (N=)

Demographics – Gender and Age



Nearly a quarter of Mobile TV subscribers indicate they watch while in their homes. The same proportion watch while commuting

Place and Occasion where Mobile TV Normally Watched



M760: When you watch TV/Video on your mobile device, what percentage of the time are you?

* Small base size of less than 30





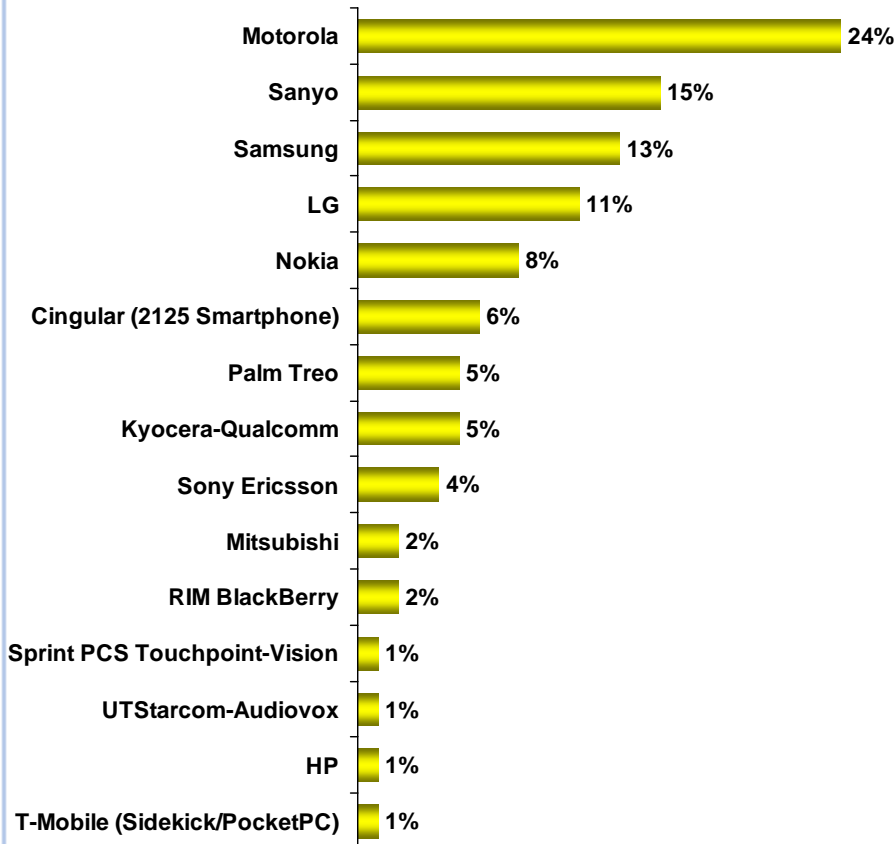
Your connection to the digital consumer

Mobile Television Handsets

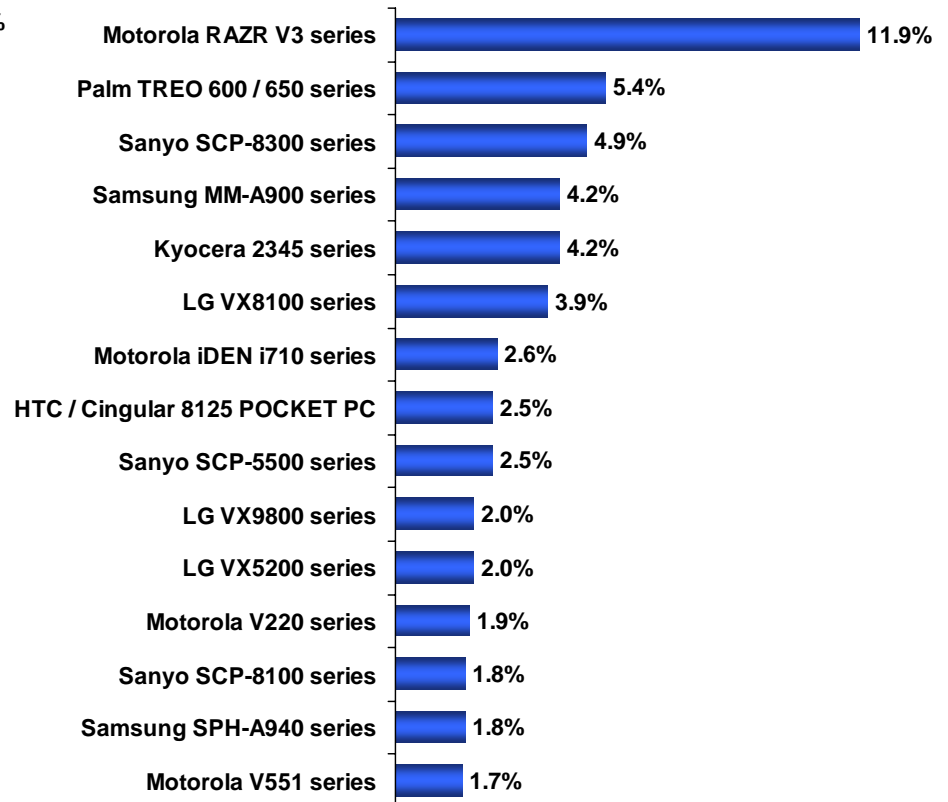
Improving Multimedia Handset Design
to Enhance the User Experience, Drive
Adoption and Service Revenues

Motorola is the preferred mobile TV handset brand, with the RAZR series occupying twice the market share as the next most utilized model

Device Manufacturer



Device Model*



**Note: Only models with more than 1.5% share of Mobile TV subscribers are shown
M1900 Now, we'd like you to identify your wireless telephone/handset.*



Your connection to the digital consumer

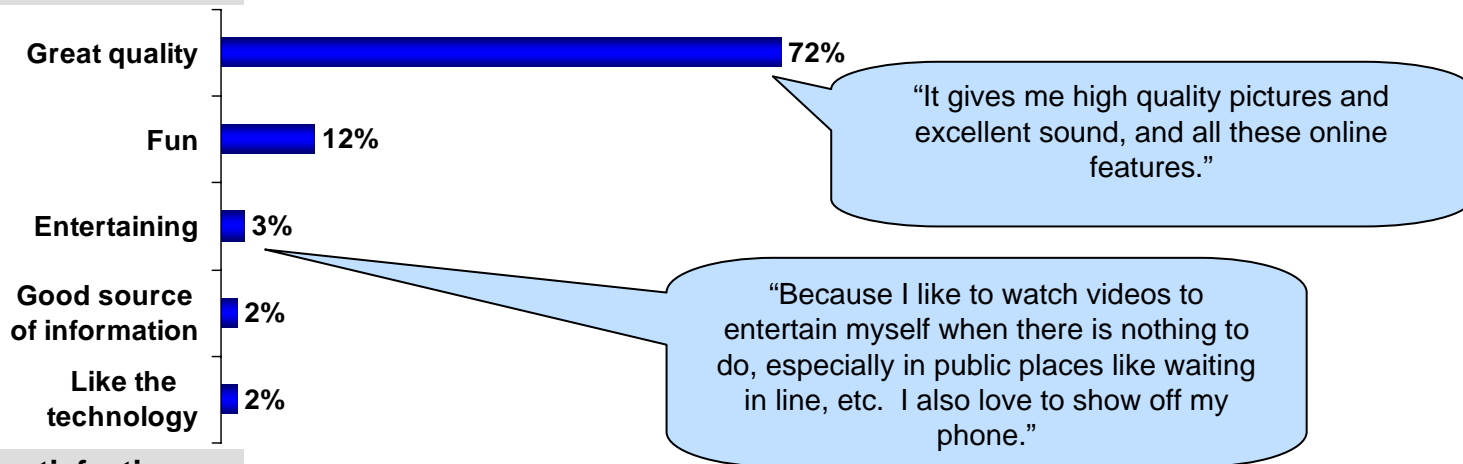
Mobile Television Service Quality

Overcoming the Technological and
Operational Challenges of Delivering
Mobile TV and Video Content

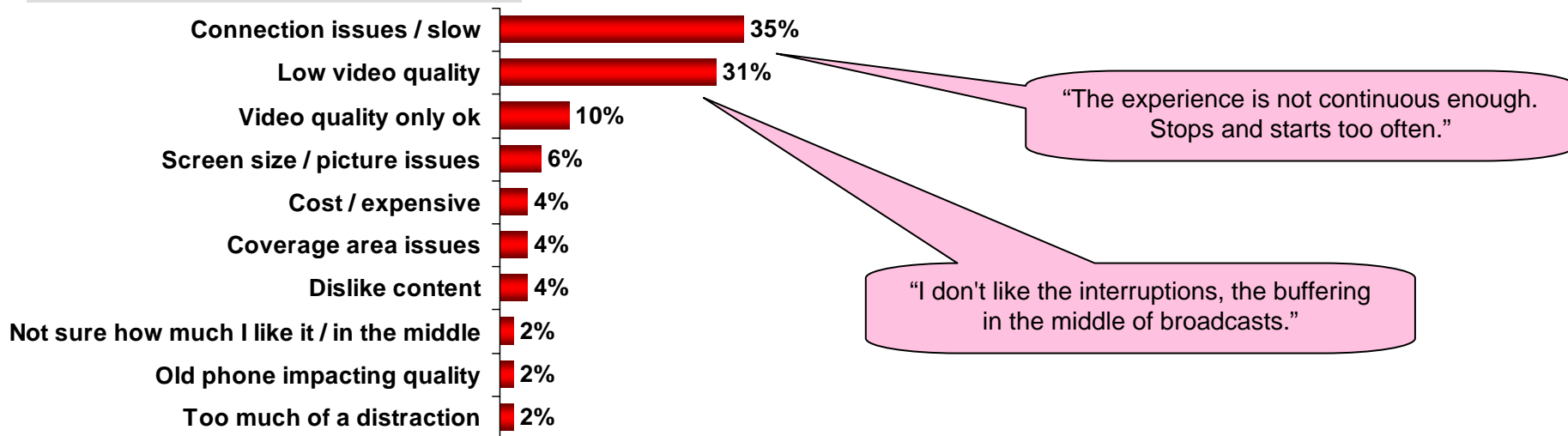
While those who are very satisfied most often cite the high quality of the video as well as a fun experience, those who are dissatisfied cite connection issues and low video quality most often.

Reasons for Satisfaction and Dissatisfaction

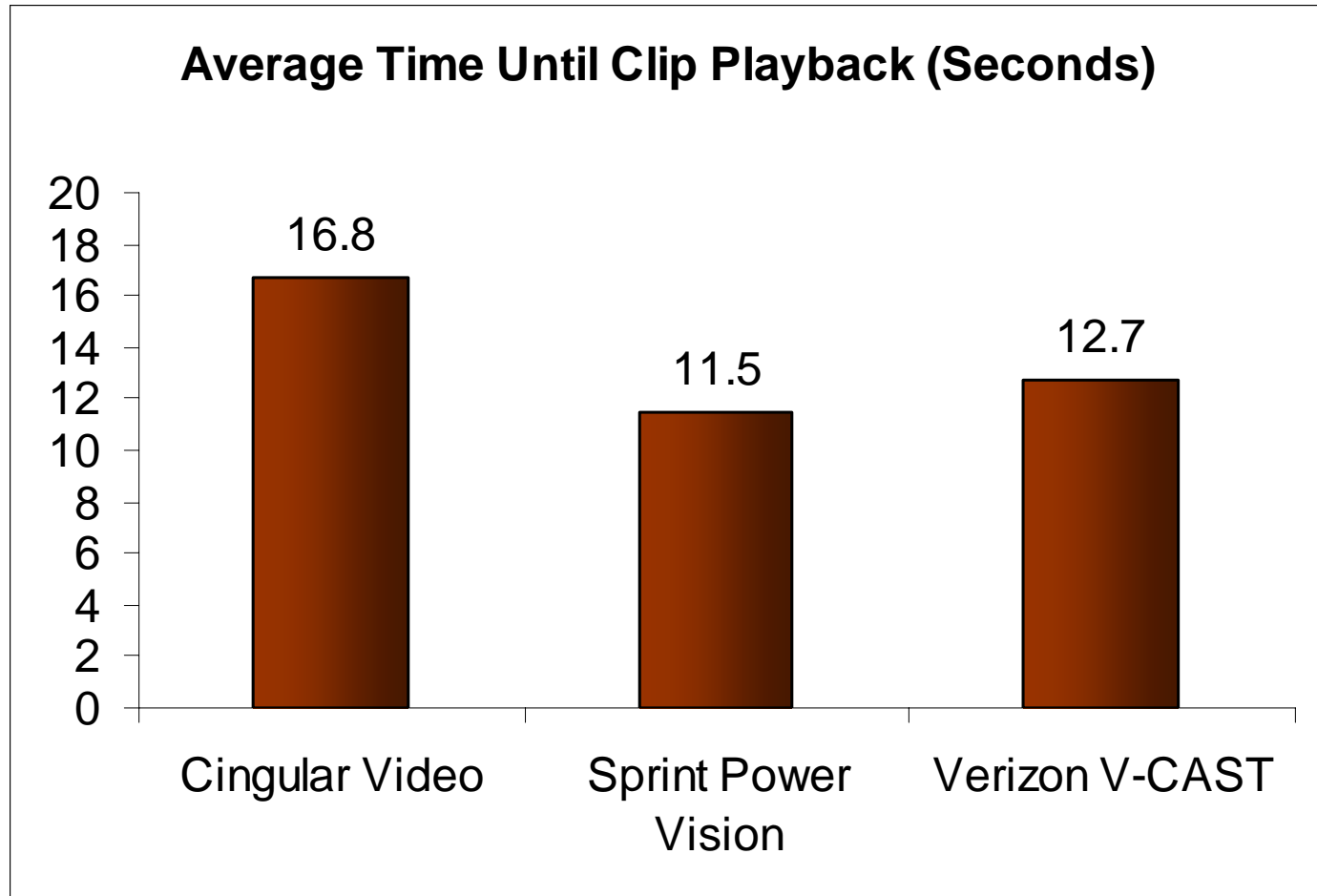
Reasons for 9 & 10 Satisfaction:



Reasons for 1 - 5 Dissatisfaction:



Application Start Up Varies. Playback is slow.



Speaker Introductions

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Technology Selection: Evaluating Standards and Best Practices for Delivering Premium TV Broadcasts to Mobile Devices

- Moderator: Rajeev Chand, *Director of Research - Senior Equity Research Analyst*, **RUTBERG & COMPANY, LLC**
 - Responsible for building and managing the firm's private equity research practice in industries under coverage, including digital media and wireless.
 - Leads the firm's coverage of the wireless industry, including roles of thought leadership, private company analysis, and transaction counsel. Specifically, his team has categorized and tracks over 2,200 privately held wireless companies globally.
 - Works with over 100 publicly held corporations, 300 venture capital firms, and 10 academic institutions to understand, formulate, and evaluate investment and acquisition theses.
 - Practice spans a broad range of product and technology categories, including semiconductors, devices, infrastructure, applications, and services, as well as wireless wide-, metropolitan-, local-, and personal-area networks.
 - Frequent speaker at private equity, technology industry, corporate, and academic events. Since initiating coverage on the wireless industry in September 2001,
 - Presented at more than 25 different conferences including CTIA, 3GSM World Congress, COMDEX, Emerging Broadband Wireless Technologies Summit, Network+ Interop, VentureOne Summit,
 - Appeared on CNNfn and has been cited in numerous publications such as Barron's, Billboard, Business Week, CBS MarketWatch, Economist, Fortune, PC Magazine, Private Equity Week, RCR Wireless News, San Jose Mercury News, Technology Review, TELEPHONY, Venture Capital Journal, Wall Street Journal, among others. Mr. Chand's research is published monthly to a readership of over 80,000 professionals.
 - Most recently, Mr. Chand served as Director of Research for iSherpa Capital, a seed stage venture capital firm. Previously, Mr. Chand served as a strategy consultant with Accenture. He earned an undergraduate business degree from The Wharton School of Business at the University of Pennsylvania.

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Revenue Generating Mobile TV Business Models: Determining the Most Successful and Profitable Strategy

- Speakers:

- Randy Boyer, *General Manager*, **conVISUAL**

- conVISUAL is a leading wireless application service provider based in Europe with offices in Europe, the US and Singapore whose business focus is on providing mobile-based interactive services with respect to terrestrial TV and mobile TV.
- Before working with conVISUAL Mr. Boyer founded a boutique international business development consultancy specializing in the international distribution of mobile content.
- From 1989 to 1993 Mr. Boyer was a senior executive at Macromedia and helped them establish their international distribution in Europe, Asia and Japan.
- From 1981 to 1988 Mr. Boyer was an international intellectual property attorney based in the United States.

- Seong-Mok Oh, *Vice President*, **KTF**

- Over 10 years industry experience in mobile communications that covers wide range of roles from network plan to corporate strategy. As a vice president of KTF, Dr. Oh is in charge of network strategy including W-CDMA network investment, Mobile-TV and FMC (Fixed Mobile Convergence) services.
- Prior to joining the network strategy business office, he worked as a head of new business office that looking for a mobile operator's new revenue opportunity.
- Dr. Oh holds a Ph.D., a M.S. and a B.S. degree in electrical engineering from the Yonsei University, Korea.

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Acquiring and Developing Compelling Content for Mobile TV

- ***Moderator: Steve Kovsky, Principal Analyst, Digital TVs & Displays Research Leader, Consumer Electronics Group, CURRENT ANALYSIS***
 - Serves as Research Leader, Consumer Electronics Group, and Principal Analyst, Digital TVs and Displays, for market research firm Current Analysis in San Diego.
 - Utilizes his extensive media experience and industry knowledge in popular digital entertainment and convergence technologies to assess manufacturers, products and emerging trends in the consumer electronics field.
 - Accomplished author of two groundbreaking technology “how-to” books: Absolute Beginners Guide to Windows XP Media Center (Que Publishing, March 2004) and High Tech Toys for Your TV: Secrets of TiVo, Xbox, ReplayTV and More (Que Publishing, March 2002).
 - Serves as a Technology Commentator for various broadcast media, including KFWB News Radio 980 in Los Angeles, and the Fox in the Morning television news program on XETV Fox Television in San Diego.
 - Has a 20-year track record as a leading technology journalist, serving in senior editorial roles at CNET, ZDNet, PC Week, Digital Review, Computer Sources, Computer Systems News and other respected news organizations.
 - Managed the CNET’s newsroom and Web site in addition to hosting a popular daily three-hour call-in show that aired in San Francisco, Boston, and nationally on the XM Satellite Radio Network.
 - Recognized expert in the field of streaming media content, Kovsky was appointed Editorial Director for Broadband for ZDNet (www.zdnet.com) in 1999, and subsequently served as a Contributing Editor for ZDNet AnchorDesk for several years.
 - Prior to joining Current Analysis, he served as Vice President and Editorial Director for Centric Events Group, organizer of the nationwide ITEC series of regional technology conferences.

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Examining the Regulatory Issues that Could Impact the Commercial Viability and Availability of Mobile TV Services

- Speakers:

- Steven J. Hamrick, *Associate, Telecommunications Group*,
FLEISCHMAN AND WALSH, LLP

- Practice focuses on both the regulatory and business aspects of the telecommunications industry, including both wireline and wireless telecommunications, as well as emerging technologies.
- Counsels a wide range of clients before the Federal Communications Commission (“FCC”) and state public utility commissions, including service providers, spectrum licensees, tower owners, broadband-centric technology companies, investment firms and applicants in the FCC’s spectrum auctions.
- Member of the Federal Communications Bar Association and is admitted to practice in the District of Columbia and Pennsylvania.

- Lawrence J. Movshin, *Partner*, **WILKINSON BARKER KNAUER, LLP**

- Head of the Firm's Wireless Transactions Group, Mr. Movshin specializes in transactional and regulatory matters, principally involving the interests of wireless system licensees and wireless network providers, major equipment manufacturers, trade associations, wireline telecommunications providers and private users.
- Clients include Verizon Wireless, Cingular, ALLTel, Dobson Cellular, Cellnet Communications, Allstream Corp. of Canada, and a host of smaller wireless providers.
- Has served as the elected Chairman of the Montgomery County, Maryland Cable Communications Advisory Committee, and has chaired the Federal Communications Bar Association's Wireless Telecommunications Practice, Membership and Professional Responsibility Committees.

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Evaluating the Latest Mobile TV Trials and Services: Results and Lessons

- Speakers: None listed
 - Izzy Abbass, *President, North America*, **U-TURN MOBILE MEDIA GROUP**
 - Responsible for U-Turn's expansion into North America and was responsible for the first launch of mobile video services for local television stations and ethnic language portals.
 - Prior to joining U-Turn, Mr. Abbass spent 15 years in cable and broadcast television, where he launched channels in Central Europe, Australia and Asia. He started Australia's first two premium movie channels, Showtime and Encore, was the General Manager for MGM Gold in Asia and COO of TV3 in the Czech Republic.
 - Raja Khanna, *Chief Creative Officer and Co-Founder*, **QUICKPLAY MEDIA**
 - Responsible for all aspects of the company's product and marketing strategies in digital media and specifically on the conceptualizing, development, production and distribution of innovative mobile information and entertainment applications and services.
 - Sits on numerous committees and advisory boards including: the Media Advisory Committee of the Ontario Media Development Corporation
 - Diverse, educational background, which includes a law degree from Osgoode Hall Law School, and a bachelor of science in philosophy and genetics from the University of Toronto.

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Overcoming the Technological and Operational Challenges of Delivering Mobile TV and Video Content

- Speakers:

- Kevin Grant, *Vice President*, **MOBITV**

- Oversees business development and carrier sales covering the Americas for MobiTV.
- Successfully engaged with Cingular, Alltel, Rogers, TELUS, Bell Mobility, Telcel, and most recently ATT.
- Previously managed the western sales division for Convergys, where Grant and his team targeted technology companies including wireless, cable/broadband, and wireline operators, providing speech recognition and care center solutions.
- Grant graduated from the University of California at Santa Barbara.

- Steve Granek, *Vice President*, *IP Services-Business Development*, **NEUSTAR, INC**

- Instrumental in leading NeuStar's groundbreaking efforts in enabling inter-working between next-generation communication and content network operators, with a specific focus on VoIP, SIP, IMS, ENUM and Digital Identity infrastructure.
- Prior to NeuStar, Mr. Granek served as VP of NextTone Communications, VP of ADC Telecommunications, and VP of Telet Communications.