



Assessing the Audience for Mobile Gambling
Gambit mobile gambling event, 4th April 2006

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*Note: Except where specified, the timeframe for all data in the present file is
monthly average for three months ending Jan. '06*



- Founded in early 2004 as a private, venture funded corporation with offices in Seattle, San Francisco, and London.
- Measuring the Mobile Market is the focus of our activities. Currently active in US, UK, DE, FR, extending service to ES and IT by year end.
- Clients:



An Informed Measurement Methodology

DEVICE CAPABILITIES

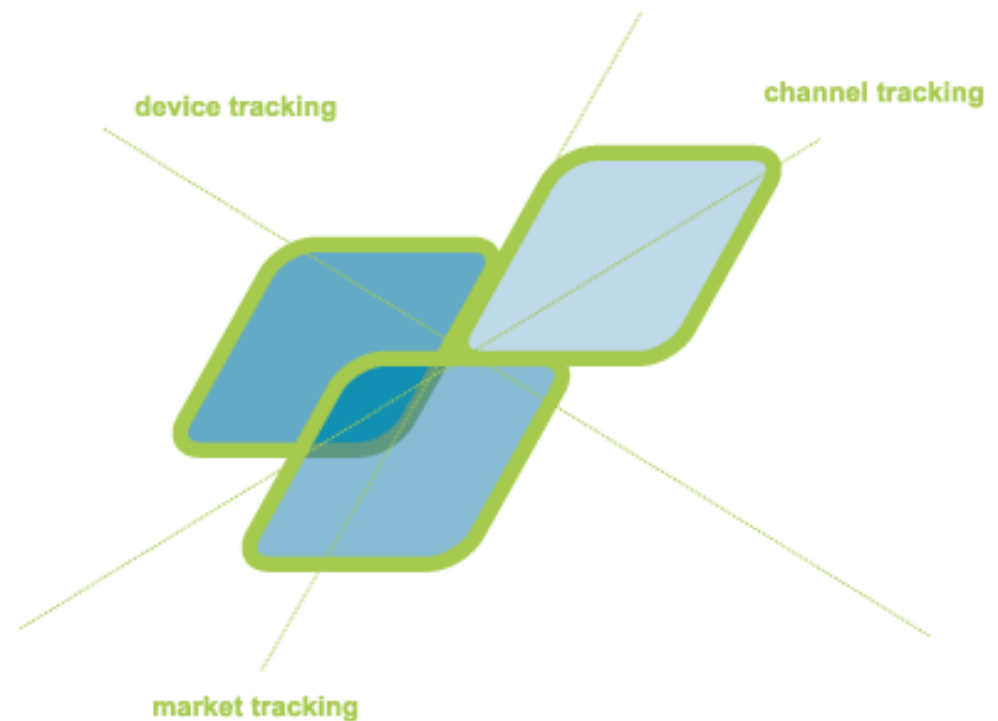
Detailed specifications for virtually every device in active use in U.S. and European Markets. Over 1,000 devices and counting.

MOBILE SUBSCRIBER ACTIVITY

Device ownership and mobile services consumption data for 25,000 mobile subscribers is collected on a monthly basis

CONTENT AVAILABILITY

Comprehensive catalog with profile details for thousands of SKUs offered by 500 publishers on carrier portals.



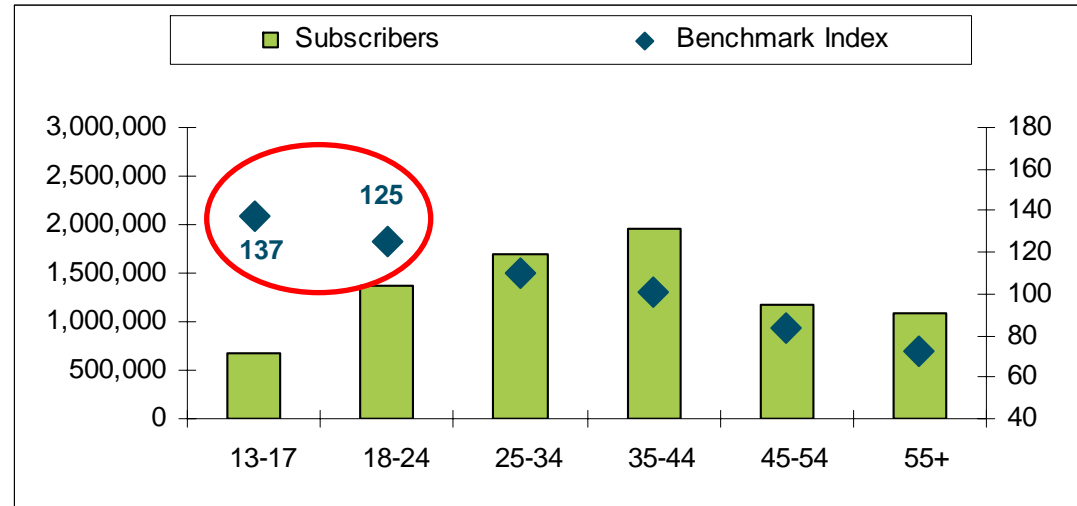
Today's market for mobile media...

	United Kingdom		Germany	
	Projected Subscribers	Market Penetration	Projected Subscribers	Market Penetration
Downloaded Ringtone	2,779,619	6.8%	3,072,633	7.3%
Downloaded Graphics	1,060,302	2.6%	1,363,870	3.2%
Retrieved News/Info	4,756,438	11.6%	1,681,605	4.0%
Downloaded Game	1,679,376	4.1%	1,014,215	2.4%
Used Photo Messaging	10,613,117	25.9%	7,921,689	18.9%
Used Personal Email	2,560,881	6.2%	2,585,018	6.2%
Used Work Email	1,175,281	2.9%	1,150,865	2.7%
Used Instant Messaging	1,319,329	3.2%	1,152,855	2.7%
Received Text Alert	2,615,627	6.4%	3,066,535	7.3%
Sent Text Message	34,266,434	83.6%	33,284,355	79.2%

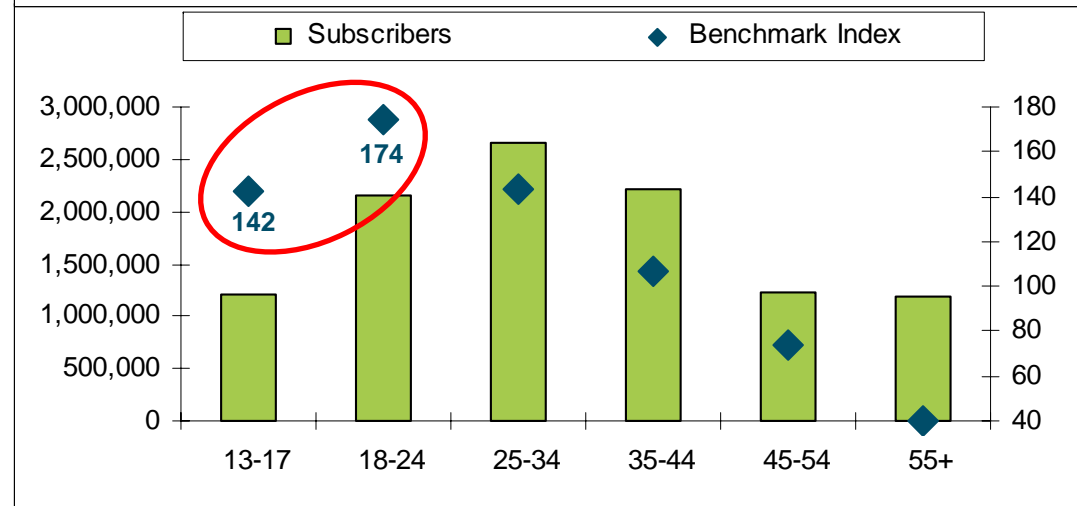
... Is mainly defined by the high consumption habits of “Generation M” (today’s 13 to 24-year-olds)

Subscribers who consumed any mobile content, by age (via browser or download)

Germany



United Kingdom

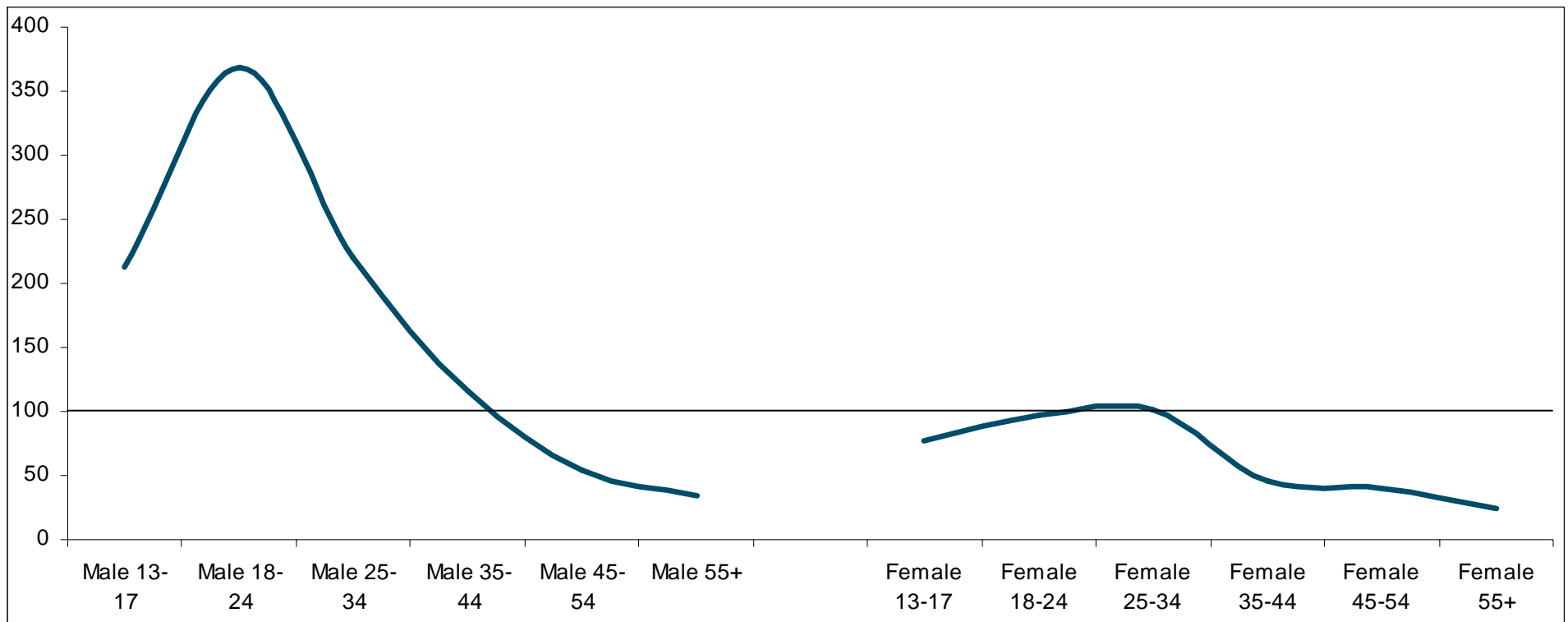


Top 10 devices for browsing and downloading in the UK

<p>Samsung D500 833,233</p> 	<p>Nokia Q4 2001 6230 578,043</p> 	<p>Nokia 6230i 495,509</p> 	<p>Sony Ericsson K750i 372,130</p> 	<p>Sony Ericsson Q1 2004 K700i 293,217</p> 	<p>Motorola V3 RAZR 261,872</p> 
<p>Nokia 6680 254,071</p> 	<p>Motorola V3 RAZR Black 246,877</p> 	<p>Nokia Q3 2004 6630 183,529</p> 	<p>Motorola Q2 2004 V220 174,316</p> 	<p>Nokia Q2 2004 3220 164,545</p> 	<p>Samsung D600 161,145</p> 

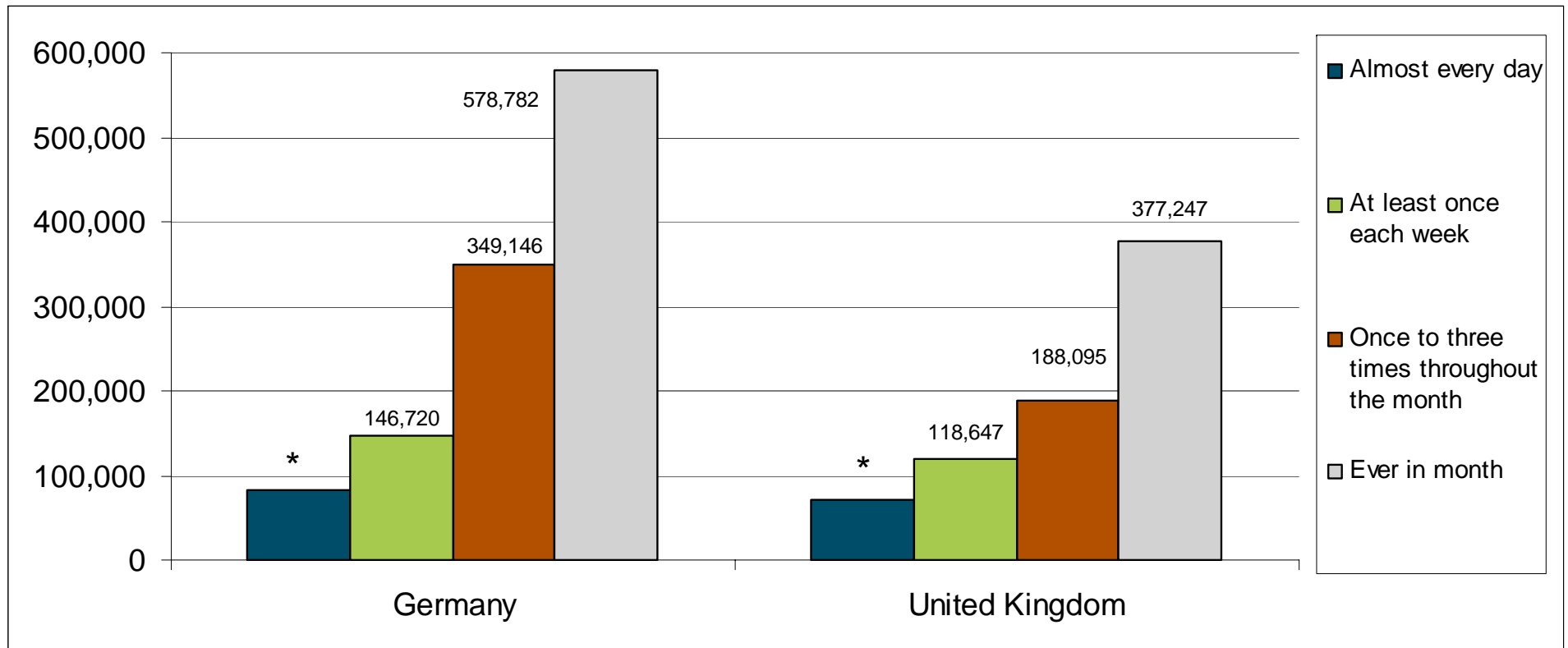
Highest consumption of mobile gambling amongst young male adults

Benchmark of users who play casino games and/or access gambling services, UK & DE



Germans are stronger mobile gamblers than UK users

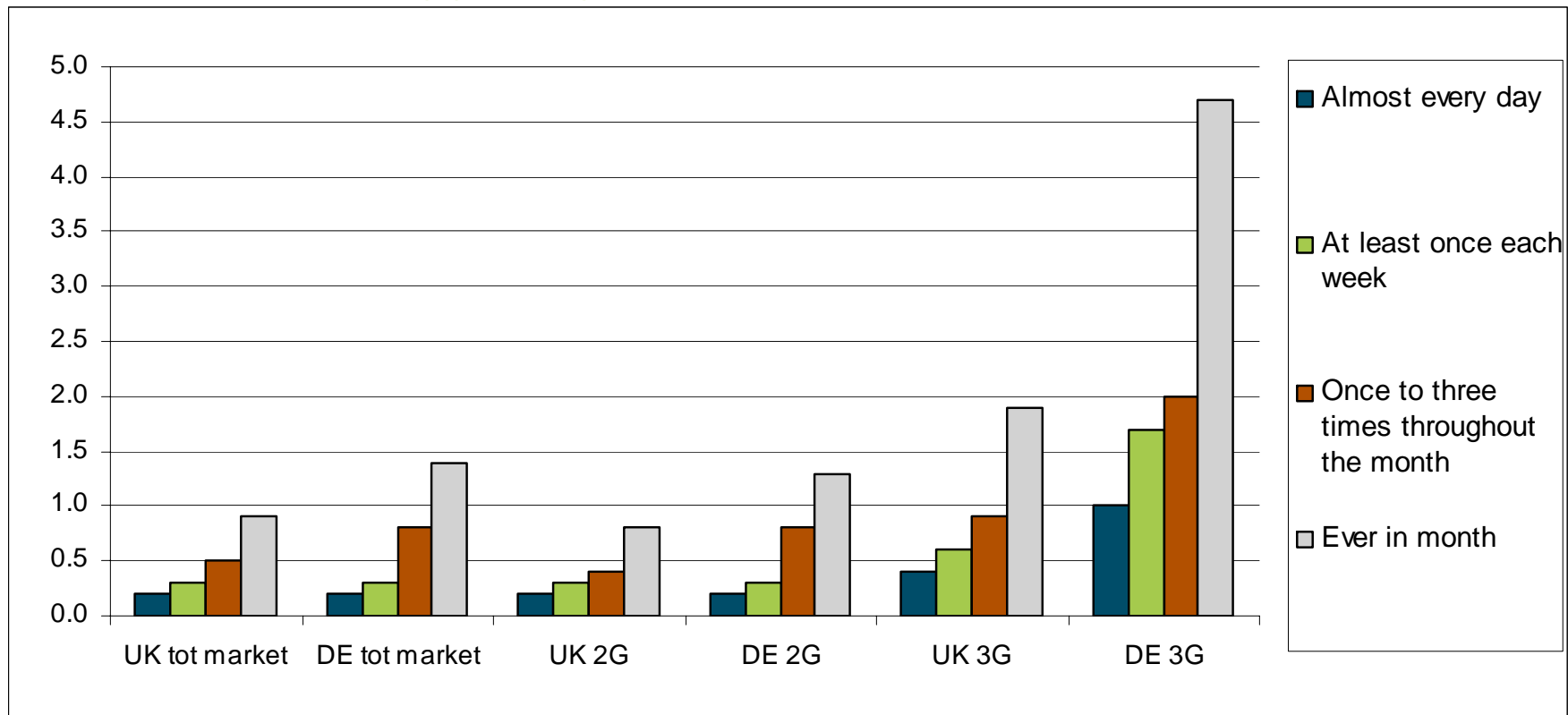
Subscribers access gambling services via mobile phone, by country



* "Almost every day" figures not provided due to small sample size

3G adoption can play a big role to push mobile gambling

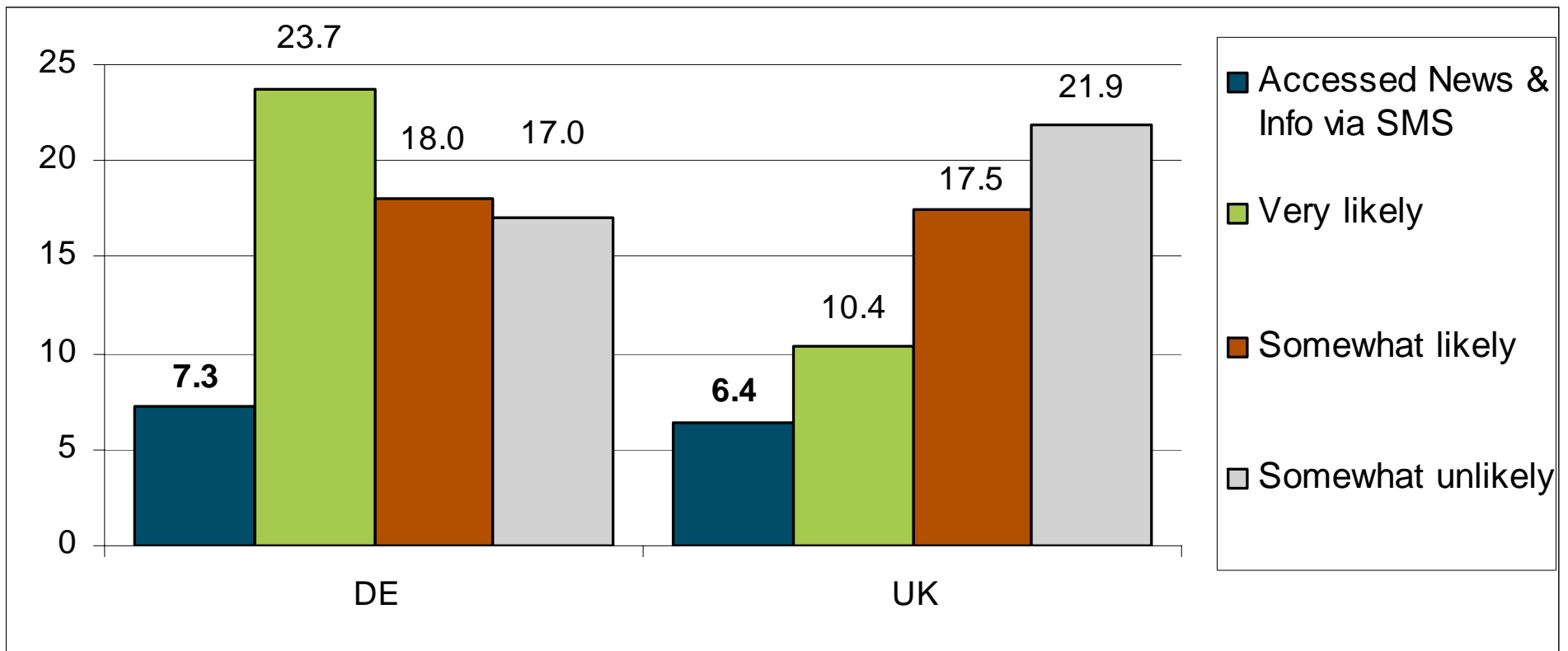
Subscribers accessing gambling services via mobile phone, by country and network type



Note: UK 3G penetration = 7.3%
DE 3G penetration = 3.1%

SMS info received & likelihood point to market potential...

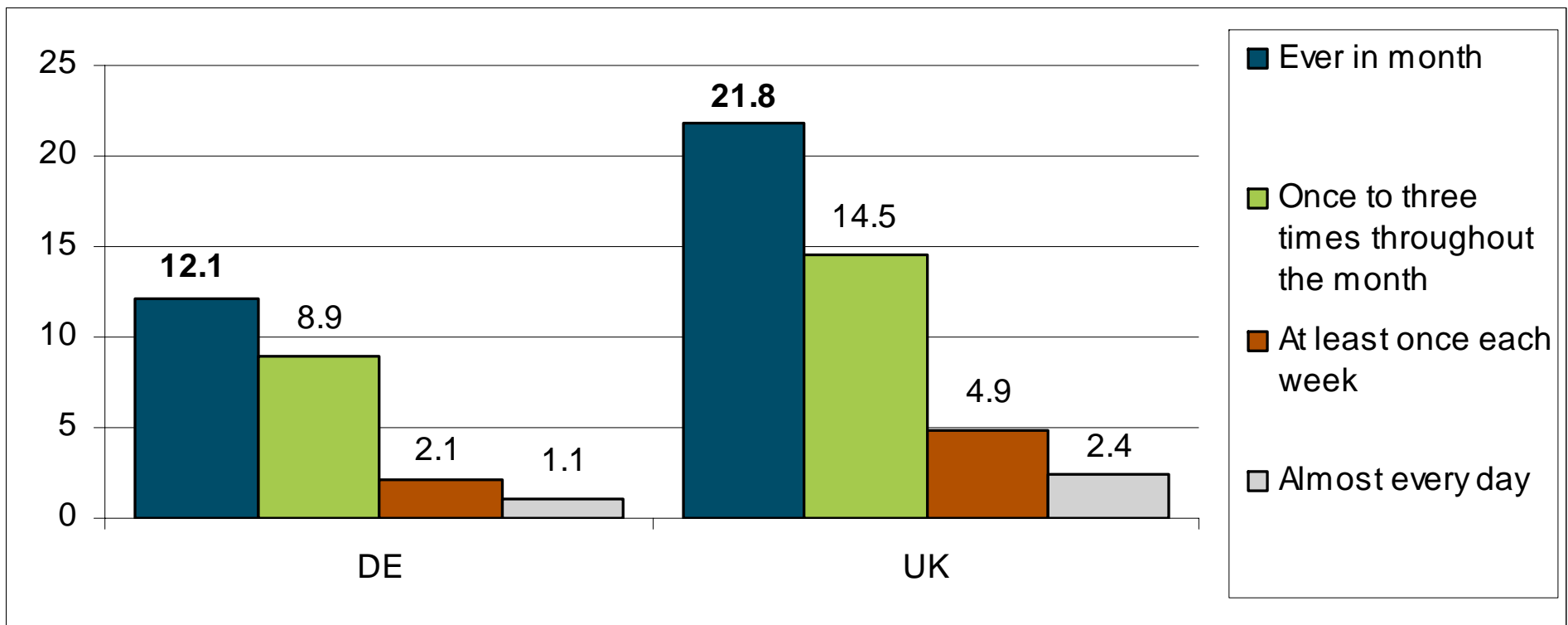
Subscribers' consumption of and propensity to access news & info services via SMS, by country



Note: Likelihood is for *receiving a text alert in the coming year*

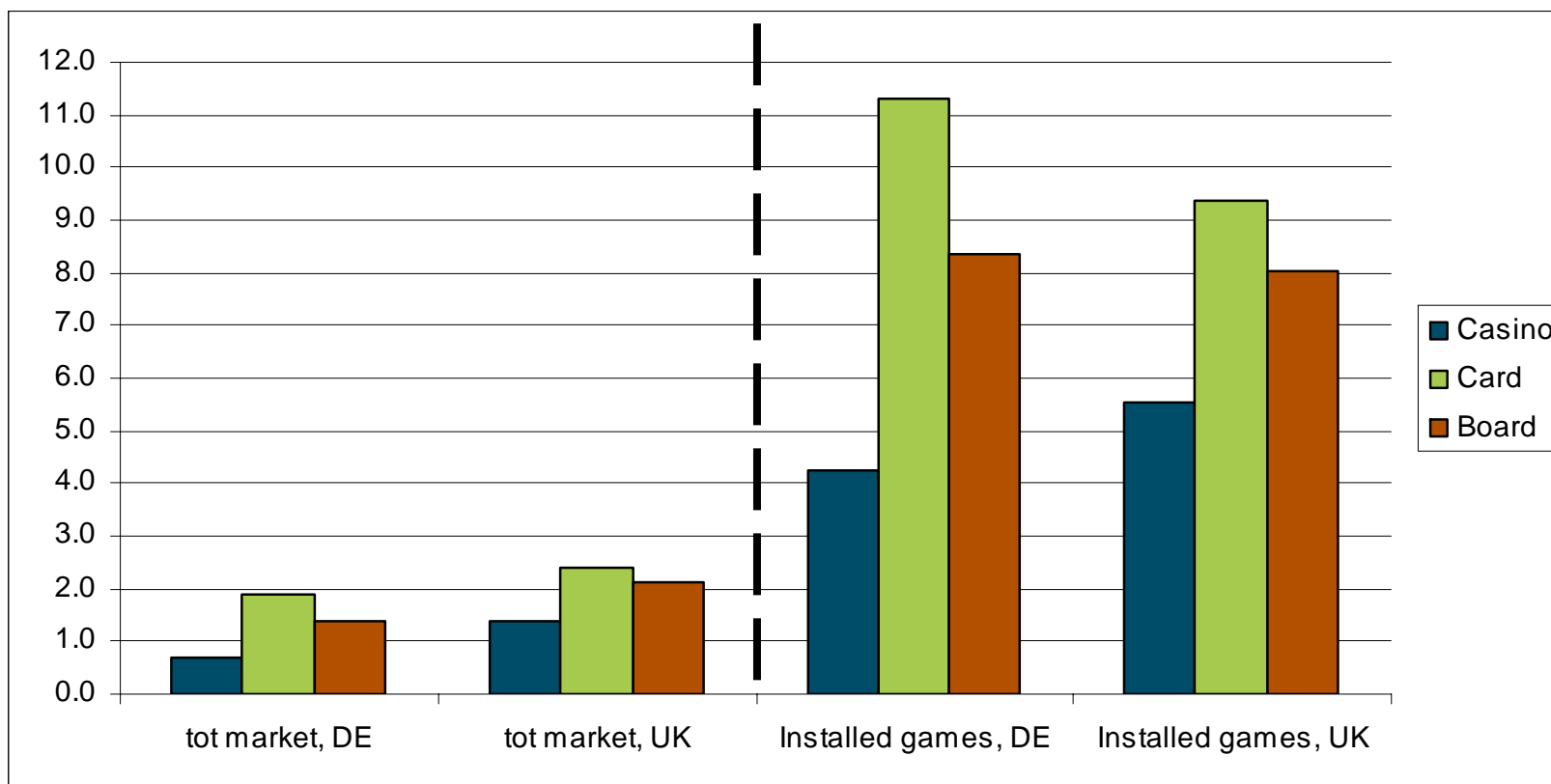
...while use of SMS polls is already high (especially in UK)

Subscribers participating in TV & radio polls via SMS, by country



Gambling game genres are niche sectors

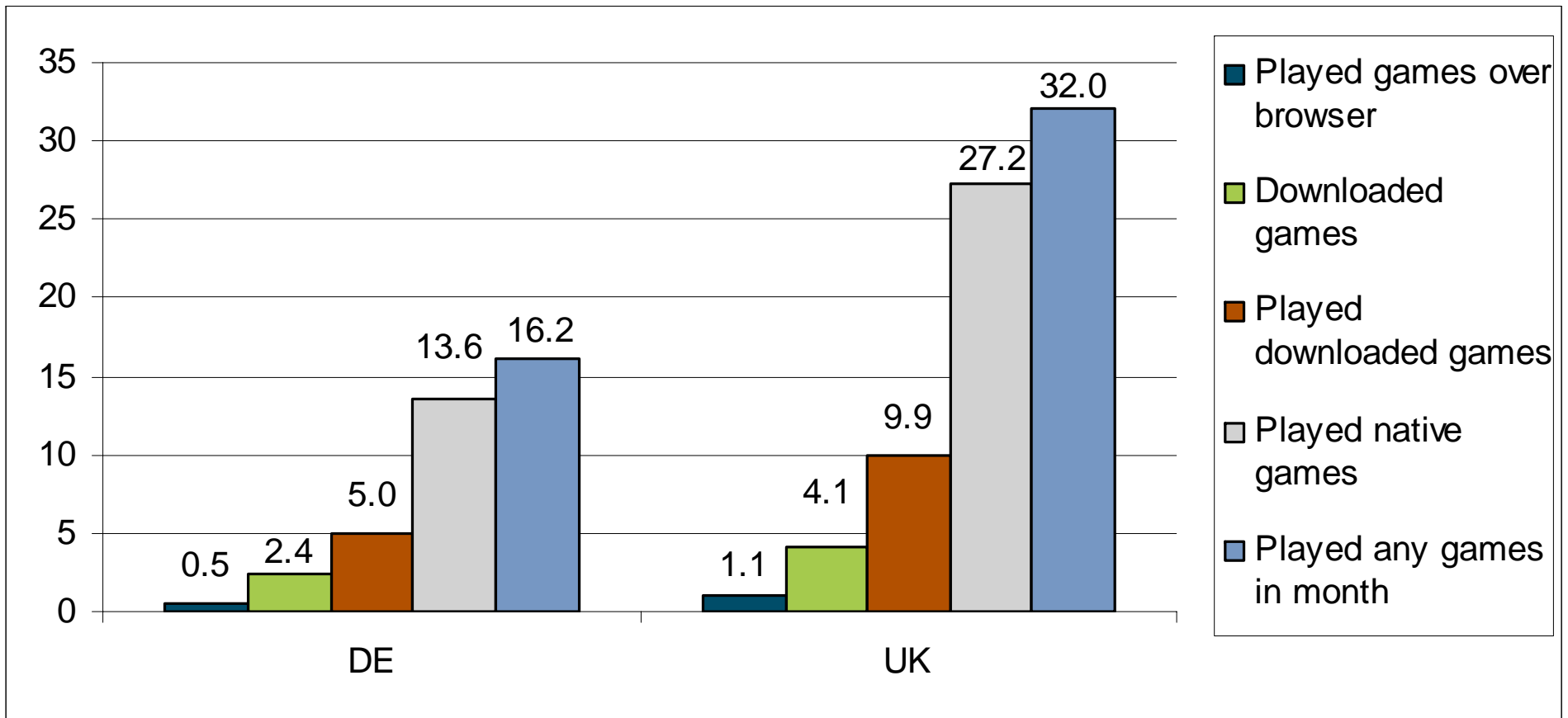
Genre of games currently installed on handset, % share



Note: Betting card games such as Poker, Texas hold' em, Blackjack or Baccarat are part of the Casino and not of the Card genre

Gambling operators can benefit from pre-installation

% of UK subscribers accessing games via different methods, in month



Weight of casino game publishers across UK carriers

M:Metrics Sentinel – UK occurrences of casino games by carrier and publisher, Jan '06

Publisher	Three	O2	Orange	T-Mobile	Virgin	Vodafone	Total
AMS			5			26	31
Avago	1						1
Blue Sphere				1			1
Butterfly Donuts			11				11
Dwango		2					2
Gameloft		18	7	1		10	36
Glu Mobile			4	1			5
Indiagames						2	2
Iomo	8	3	4			2	17
Jamdat		7		1		7	15
Konami		1					1
Mforma	4	8	6	1		7	26
Orange			16				16
Player 1			9			15	24
Player X		2					2
Superscape		5	5	1		7	18
Virgin Mobile					1		1
Vivid			1				1
WAP3	4					6	10
Total	17	46	68	6	1	82	220

*Disclaimer:
Data based
on **25 most
used devices**
for mobile
browsing &
download,
representing
18% of total
segment.*

*The data is
not weighted,
and therefore
to be used for
directional
purposes only*

Take-home points

- **The demographic profile of the mobile gambling segment is strongly male-skewed compared to the entire mobile content segment; in both cases, 13- to 24-year-olds are the strongest users**
- **German mobile subscribers are heavier mobile gambling users than UK mobile subscribers**
- **3G users are 2-4 times more likely to use mobile gambling services than 2G users**
- **For low-tech subs, gaming via push SMS can be a viable alternative to more complex platforms**
- **Casino games are a viable platform, with an installed base of about 5% of mobile gamers. Card and board games with gambling elements are another option**
- **Most users tend to stick to preinstalled software, and mobile gambling companies can benefit from investing in deals with carriers or OEMs, if the political hurdles can be overcome**

m:metrics

Thank you for your attention

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