

ConnectedView Market Adoption Monitors & Forecasts



Overview

The global connectivity revolution will disrupt long-held definitions of customers, products, systems, networks and value across all industries. Keeping pace is difficult. Staying ahead is nearly impossible. Yankee Group charts the global connectivity revolution and predicts what is to come. Using our Market Adoption Monitors & Forecasts, you will have the ability to see what we see—connectivity change—from what the market is doing now to what it will be doing in 5 years. It's like a crystal ball for your business.

To help you understand where to invest capital, which market segments are ripe for entry, a product's lifecycle, and potential market opportunities and threats, Yankee Group Market Adoption Monitors & Forecasts deliver the data required to make industry-leading business decisions.

Market Adoption Monitors & Forecasts

Yankee Group Market Adoption Monitors & Forecasts are part of our Link Data family. Yankee Group Link™ Data provides the quantitative and analytical charting of:

- What has happened (monitors)
- What is happening (surveys)
- What will happen (forecasts)

Data from our Market Adoption Monitors & Forecasts portray the state of the market players and the future direction of the market. Yankee Group cuts our data into two primary products: ConnectedView and Network:

- **Yankee Group ConnectedView™ Market Adoption Monitors & Forecasts** comprise of data specific to end-user demand behavior stemming from the impact of global connectivity. We call it ConnectedView because the product encompasses consumer, enterprise and mobile viewpoints.
- **Yankee Group Network Market Adoption Monitors & Forecasts** examine the essence of connectivity change specific to the equipment and services landscape that makes up the global connectivity revolution.

	ConnectedView Monitor/Forecasts	Network Monitor/Forecasts
North America	ConnectedView <ul style="list-style-type: none">• Consumer• Enterprise• Mobile	Network
EMEA		
Latin America		
Asia-Pacific		
Global (All of the above plus global forecasts)		

ConnectedView

Yankee Group understands that finding the exact data you need at the moment you need it is often an arduous task. By grouping our data into general categories or activities, you can find what you need more quickly. Let's face it. Data can be complex, but finding it doesn't have to be.

Yankee Group ConnectedView Market Adoption Monitors & Forecasts provide comprehensive information about connectivity markets around the world. They offer a quantitative view of demand to connect from Anywhere from the consumer, enterprise and mobile viewpoints. The value of gathering collective data across these three perspectives is necessary because of their interdependence on each other as the global connectivity revolution progresses. Together, they form the Anywhere ecosystem. Forecast data is then organized by eight Activities:

1. Connecting to the Internet
2. Connecting to Each Other
3. Talking
4. Listening to Music and Playing Games
5. Watching Video
6. Getting Information
7. Retail Transactions
8. Devices

The Activity view of our data provides a direct link between the technology itself and the end-user behavior. The following is a detailed look into what type of data is available within each activity.

Connecting to the Internet

The *Connecting to the Internet* Activity quantifies and projects how consumers and enterprises will connect to the internet. This provides the concept of the Digital Universe: a measure of the addressable market of internet-connected users, including:

- Narrowband and broadband home connections
- Broadband and leased-line enterprise connections
- DSL, cable modem, FTTH and other breakouts
- Mobile internet

Connecting to Each Other

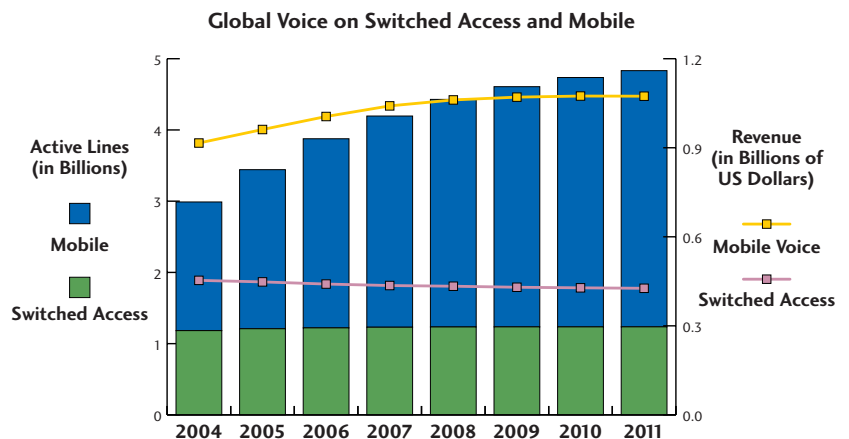
The *Connecting to Each Other* Activity quantifies and projects how consumers and enterprises connect directly to one another.

- Mobile subscriptions and contracts
- Consumer P2P data services (such as SMS, MMS)
- Managed mobility services for enterprises
- Corporate data services (such as IP VPN, Ethernet)

Talking

We cover voice communications within the *Talking* Activity. Users are starting to care more about the ability to connect from Anywhere and less about the technology that enables their voice communication. Fixed-mobile convergence is giving way to a third mechanism as VoIP becomes a mainstream disruptor and revenue opportunity. The Talking Activity shows the interrelationship between plain old telephone service (POTS), mobile and VoIP, including:

- Traditional switched access
- Mobile phone usage
- VoIP services including cable VoIP, bring-you-own-broadband services such as Vonage and FTTx VoIP services

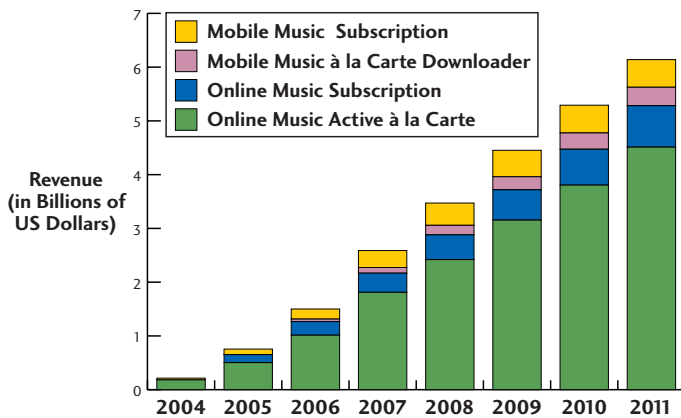


Listening to Music and Playing Games

Digital music and online gaming systems are taking over traditional physical standalone receivers and consoles. Yankee Group charts the growth of digital music and gaming. Key coverage areas include:

- Streaming music and downloaded music to mobile phones and dedicated music devices
- Online and downloaded games to mobile phones and dedicated gaming devices such as the PSP
- Game consoles

Downloaded Music Revenue in the United States



Watching Video

Video is a critical activity for consumers, content providers and distributors. Traditional TV services (such as cable and satellite) are threatened by IPTV and telco TV services. TV used to be a sit-back experience, but as broadcast gives way to interaction, value-added services will augment revenue potential for content providers and distributors.

Key topics in the Watching Video activity include:

- Analog TV service
- Digital cable and satellite TV subscribers and revenue
- IPTV and telco TV subscribers and revenue
- TV over fiber
- Video downloads for viewing on mobile phones and dedicated devices
- Mobile TV
- TV broadband, video-on-demand, DVR
- HDTV

Getting Information

People connect to the internet to get information. The *Getting Information* Activity provides detailed flow-share forecasting of who gets the money in a number of mobile information markets, including:

- Basic infotainment
- Interactive entertainment and communities
- Adult entertainment
- Productivity and personal information
- Non-voice directory

Retail Transactions

The *Retail Transactions* Activity covers connectivity as it supports commerce. This data quantifies B2C, C2B and B2B commercial interactions including:

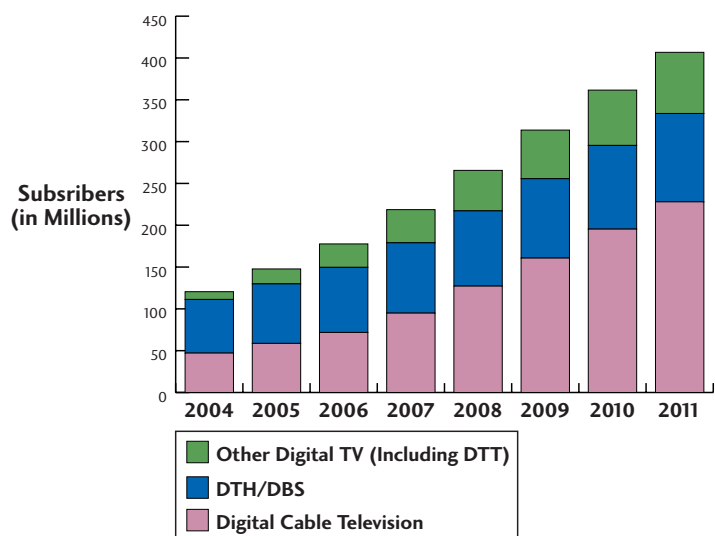
- Mobile advertising
- M-commerce
- Mobile-specific products (such as ringtones and graphics)

Devices

The *Devices* Activity incorporates physical devices in use, enabling technical solution providers to define their addressable market. We cover mobile devices and other consumer devices in detail, including:

- Mobile devices by technology, enabling technology and feature
- Games consoles
- Portable audio devices and portable games devices

Global Digital TV Subscribers



ConnectedView Monitors

ConnectedView also provides detailed comparable information about the state of players in the market via Monitors. Monitors are retrospective, quarterly trackers of company performance. Yankee Group normalizes the data to standardize reporting from carriers and utilizes our interview and survey programs to ensure the data is comprehensive.

ConnectedView Monitors cover 116 mobile operators globally, MSOs in the United States and European Broadband Products. Within each of the mobile operators, we cover topics such as subscribers, ARPU, revenue, voice and data revenue, minutes of use, churn, customer acquisition and net present value.

Demographics

Yankee Group Market Adoption Monitors & Forecasts collate secondary information such as population, households, GDP from 4 regions—North America, Latin America, EMEA, Asia-Pacific—and a full global view that spans more than 50 countries.

Yankee Group Methodology

We extend our rigorous methodology to our data products. With more than 1.5 million data points in our forecasts and monitors, we understand the value hard data has on business today. Our data products are:

- Strategically relevant
- Accurate
- Timely
- Easy to use
- Auditable

Whether it is Yankee Group Link Data or Link Research, our methodology ensures you receive the highest quality analysis at all times.

Deliverables

- Delivered in MS Excel for easy data re-use
- Quarterly updates provide the latest information and expert analysis
- Interactive Extraction Tool enables custom exports of data to Excel and PowerPoint
- Instant Comparisons Tool enables single-click comparisons of data between companies and regions
- Analyst availability for inquiry
- Automatic quarterly update notification
- Currency conversions. All forecasts and monitors are conducted in local currency, and dynamically converted into any of 52 currencies. The rate can be set to match corporate policy
- Navigation aids for entire regions
- Consistent definitions globally ensure accurate strategic decisions

Yankee Group Data Methodology	
<i>Historic Data</i> Creation Techniques	<i>Forecasting</i> Techniques
<p>Reporting secondary data points isn't enough for our clients. We deliver four Cs in data—consistency, comprehensiveness, clarity and comparability—in a timely manner. Resolving data incongruities relies on a number of sources and techniques:</p> <ul style="list-style-type: none"> • Rigid application of definitions • Published financial and operational information • Reports available exclusively to the analyst community • Contacts within the industry • Survey information • Yankee Group expertise 	<p>Future market activity depends on many factors. Detailed methods depend on the market we're forecasting. We leverage a number of tools and techniques, including:</p> <ul style="list-style-type: none"> • Yankee Group Market Maturity CurvesSM and historic demand trends • YG proprietary results • Demand-side shocks • Industry information • New products and players • Supply-side factors • Regulatory changes • Yankee Group expertise

More Information

For more information on Yankee Group's Link Data products and Market Adoption Monitors & Forecasts, contact us at linkmembership@yankeegroup.com or visit us at www.yankeegroup.com.