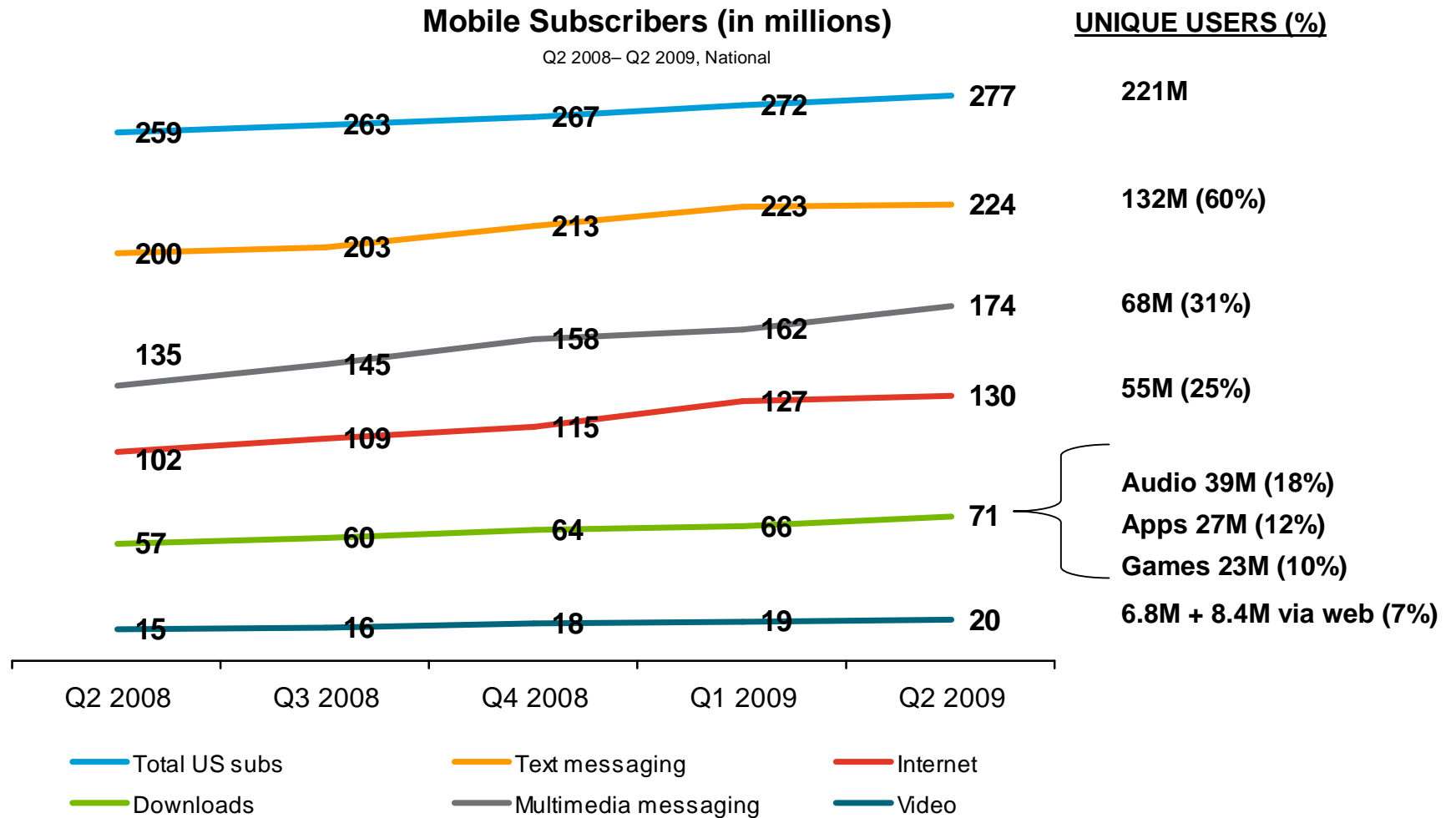


Landscape

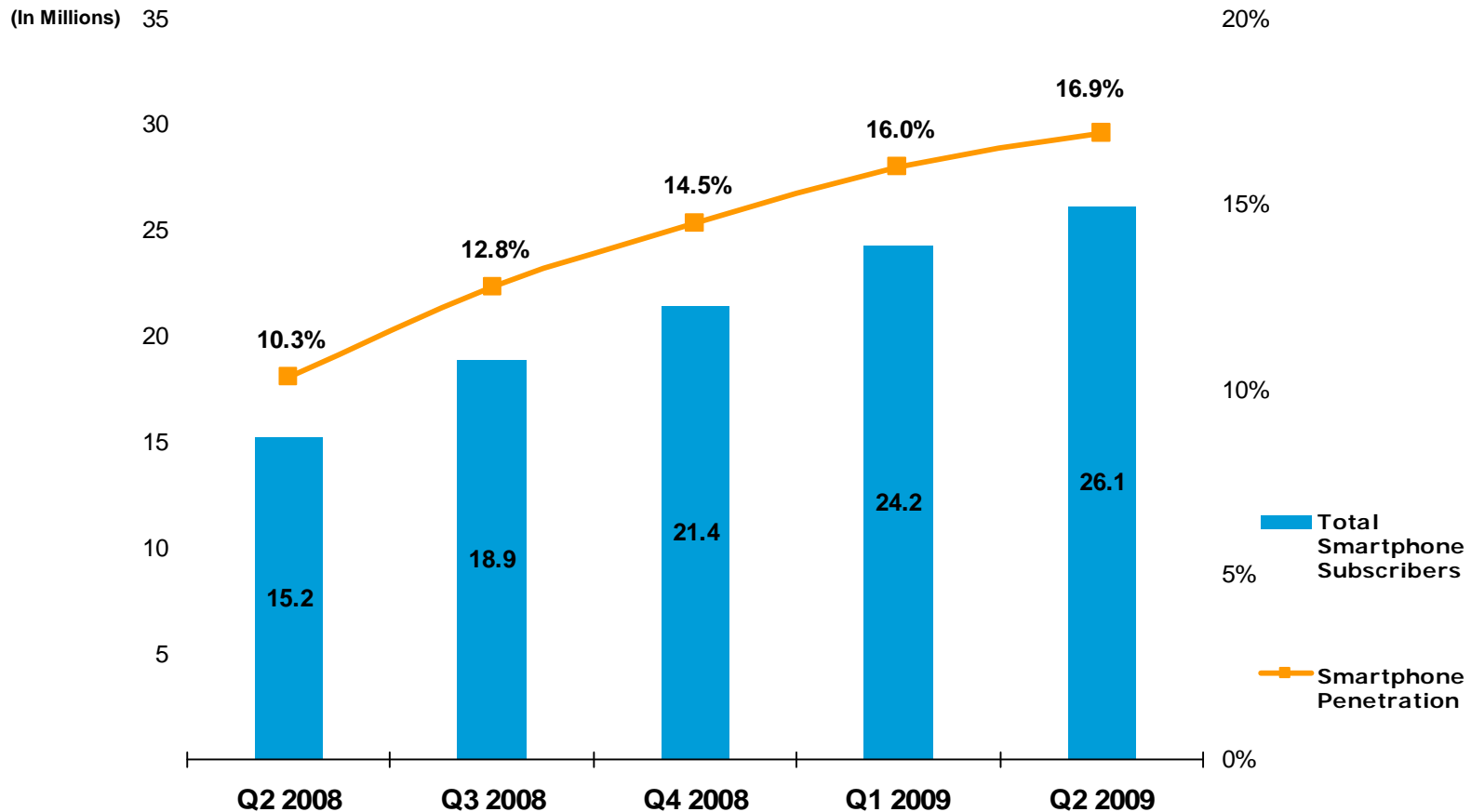
Mobile consists of a diverse set of media vehicles, each with their own unique reach and opportunities



Total Smartphone subscribers increased 72% from Q2 2008 – Q2 2009

Smartphone Subscribers and Device Penetration

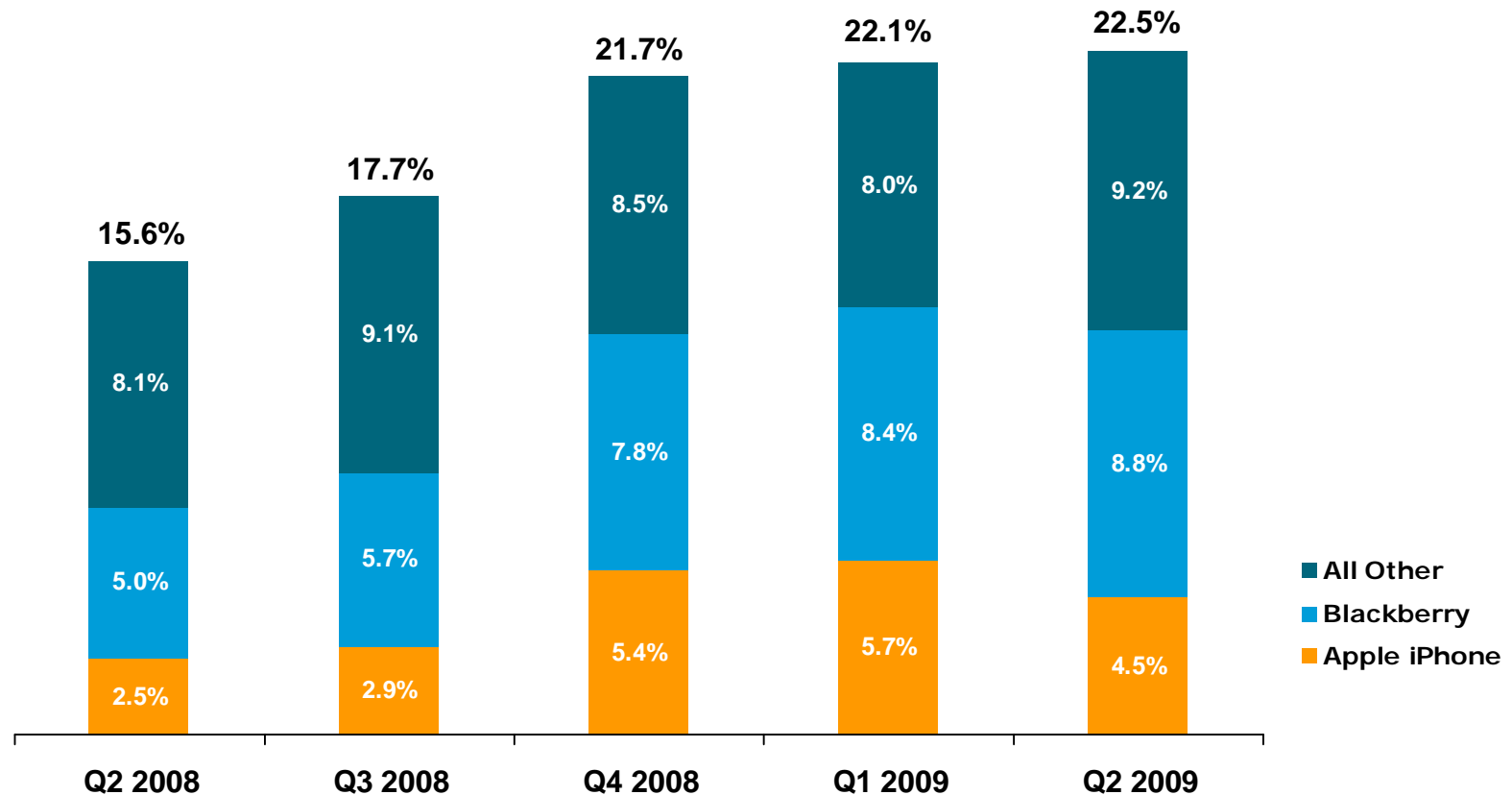
Q2 2008 – Q2 2009, All Mobile Subscribers



Smartphone penetration continues to grow steadily among recent acquirers

Smartphone Device Penetration Among Recent Handset Acquirers

Acquired device in the past 6 months, Q2 2008 – Q2 2009

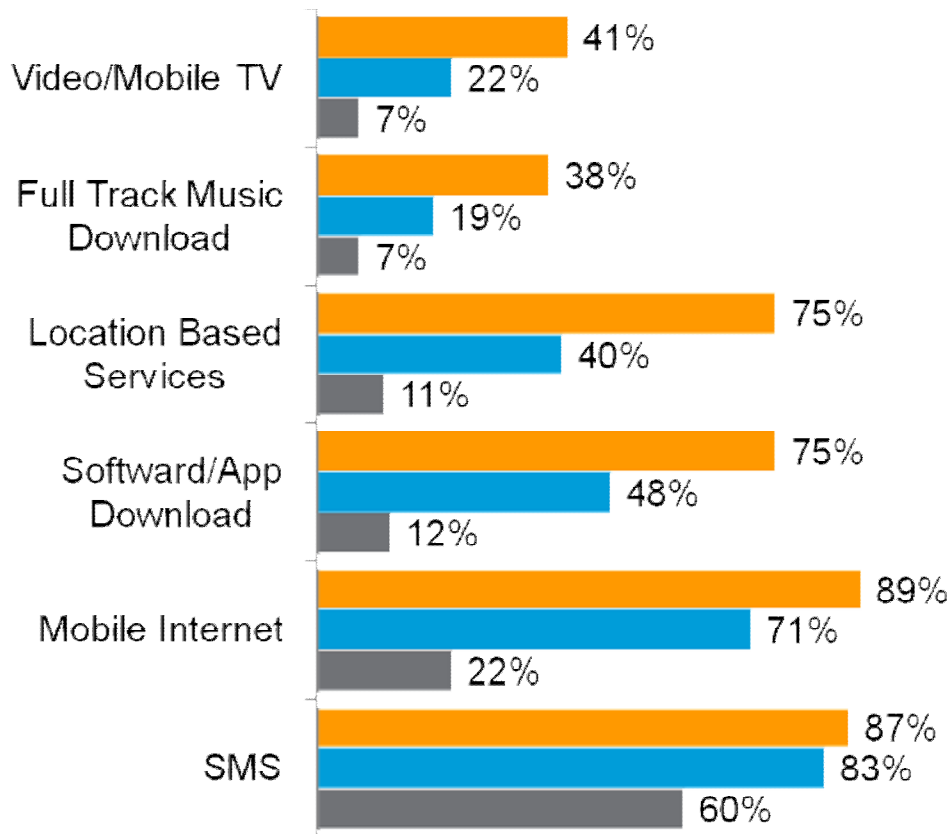


Mobile Media Consumption

iPhone owners over index on both music downloads and video viewing; built-in handset features are emphasized as well

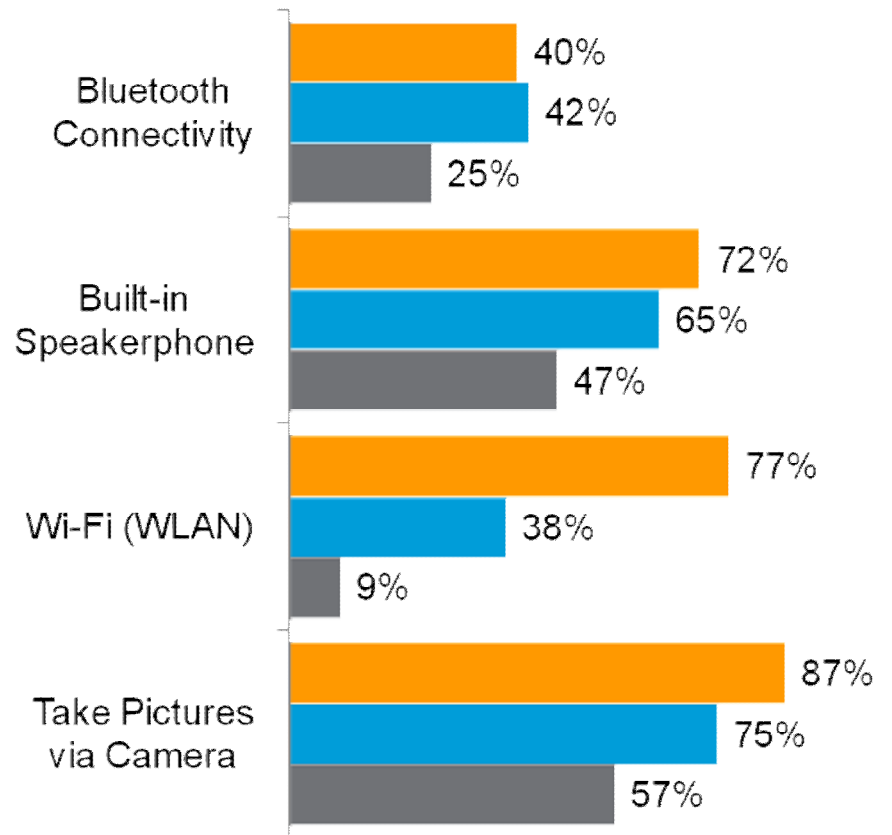
Media Usage

Q2 2009



Features Regularly Used on Handset

Q2 2009

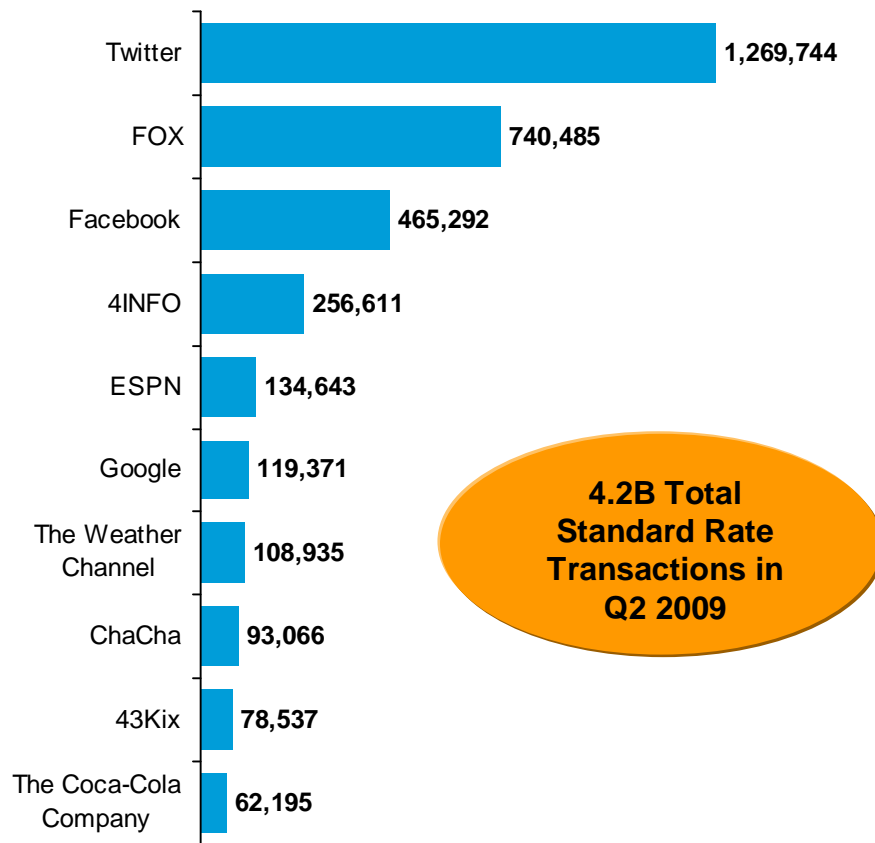


■ iPhone ■ All Smartphones ■ All Subscribers

Top performing SMS campaigns are coming from a wide variety of sources and genres

Top Standard Rate SMS by Transactions (000s)

AT&T and Verizon, Q2 2009



Unique Users (000s) by SMS Brand

AT&T and Verizon, Q2 2009

| Unique Users by SMS Brand | | |
|---------------------------|--------------------------|-----------------------|
| Title | # of Unique Users ('000) | Transactions per User |
| All Titles | 50,162 | 85 |
| Twitter | 3,676 | 345 |
| FOX | 4,129 | 179 |
| Facebook | 5,610 | 83 |
| 4INFO | 4,617 | 56 |
| ESPN | 805 | 167 |
| Google | 3,796 | 31 |
| The Weather Channel | 1,096 | 99 |
| ChaCha | 2,317 | 40 |
| 43Kix | 352 | 223 |
| The Coca-Cola Company | 2,333 | 27 |

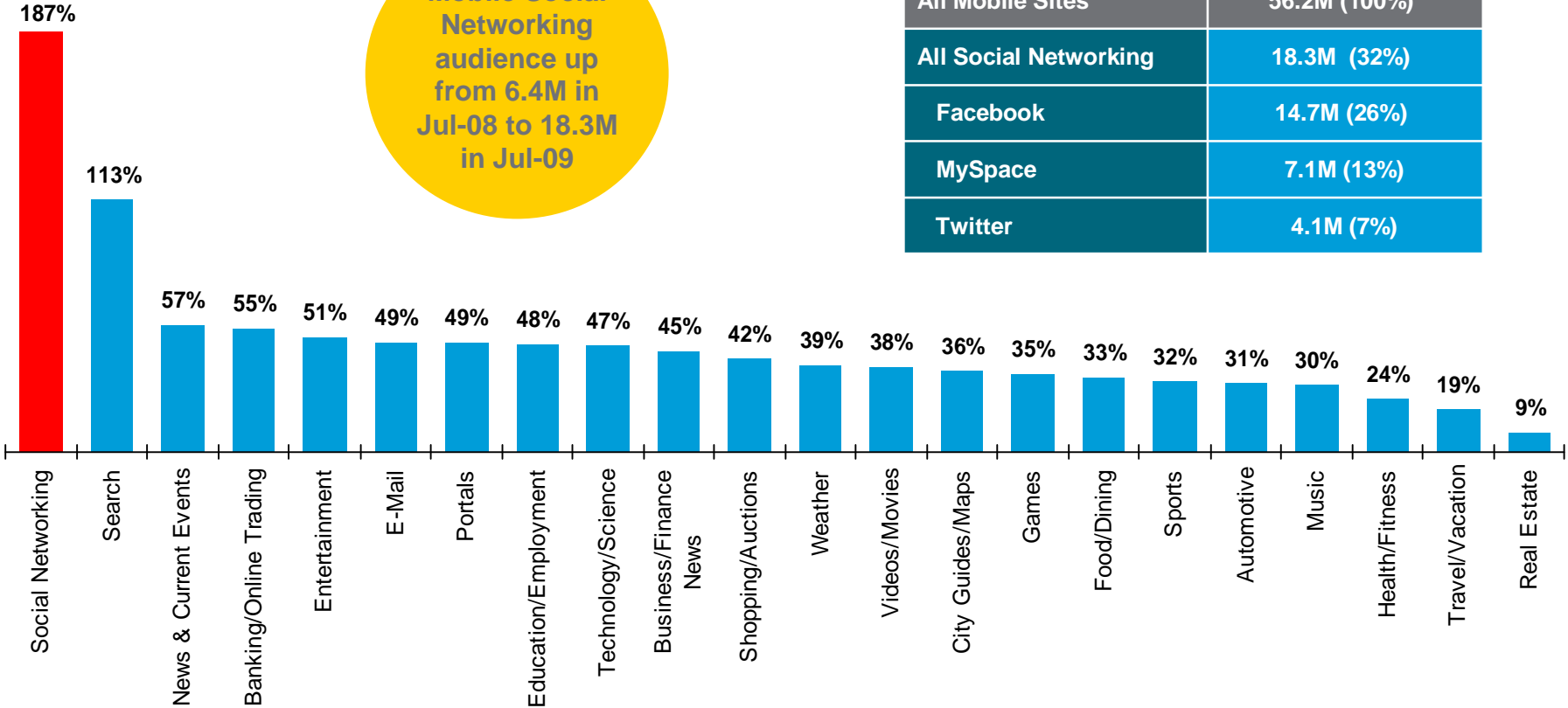
Social networking is driving mobile Internet growth

Mobile Internet Audience Growth by Category

July 2008 – July 2009, National

Mobile Social Networking audience up from 6.4M in Jul-08 to 18.3M in Jul-09

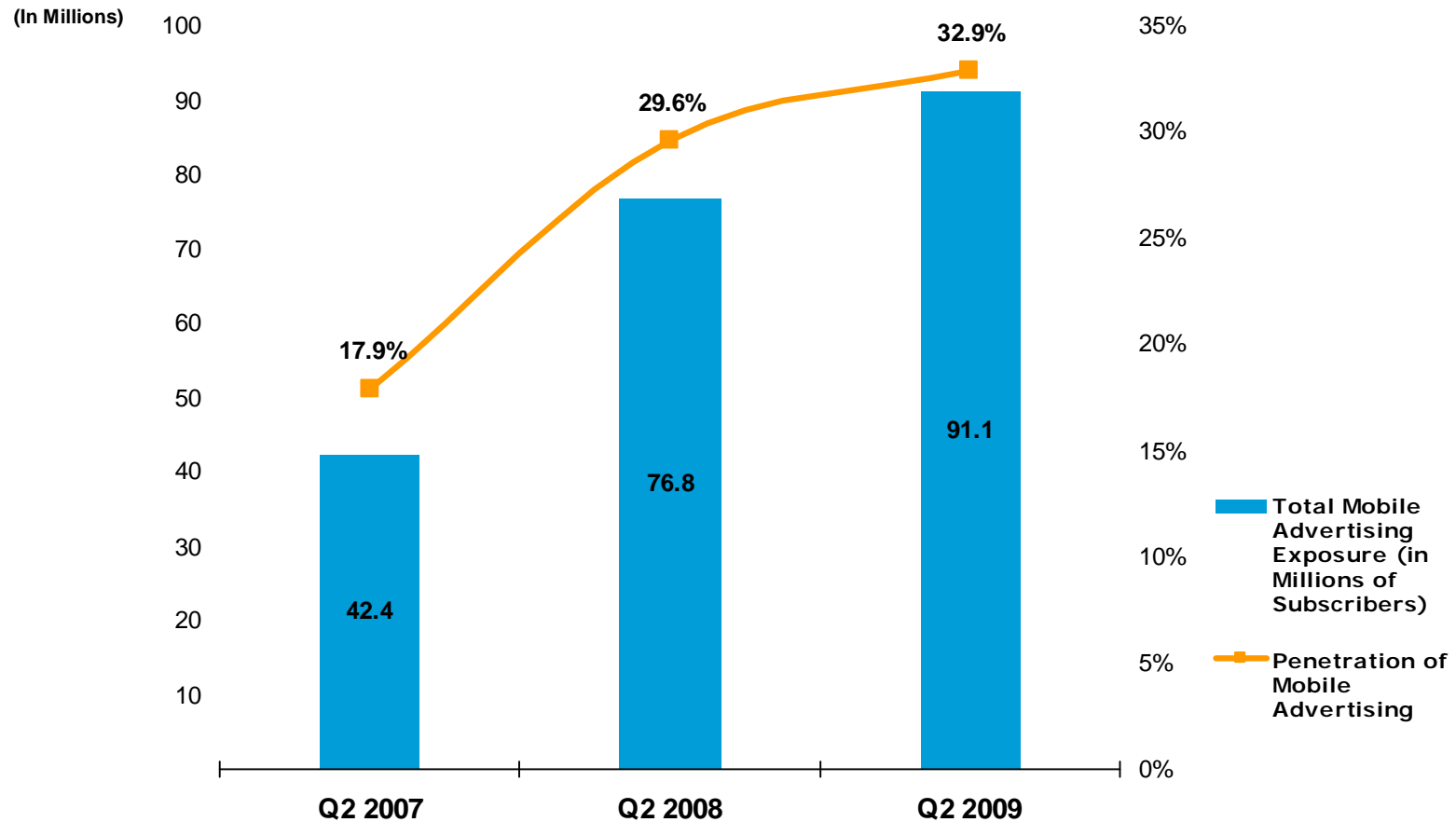
| Category / Site | # of Unique Users and Reach |
|-----------------------|-----------------------------|
| All Mobile Sites | 56.2M (100%) |
| All Social Networking | 18.3M (32%) |
| Facebook | 14.7M (26%) |
| MySpace | 7.1M (13%) |
| Twitter | 4.1M (7%) |



Over 91M subscribers recall seeing some form of mobile advertising

Mobile Advertising Exposure (in millions)

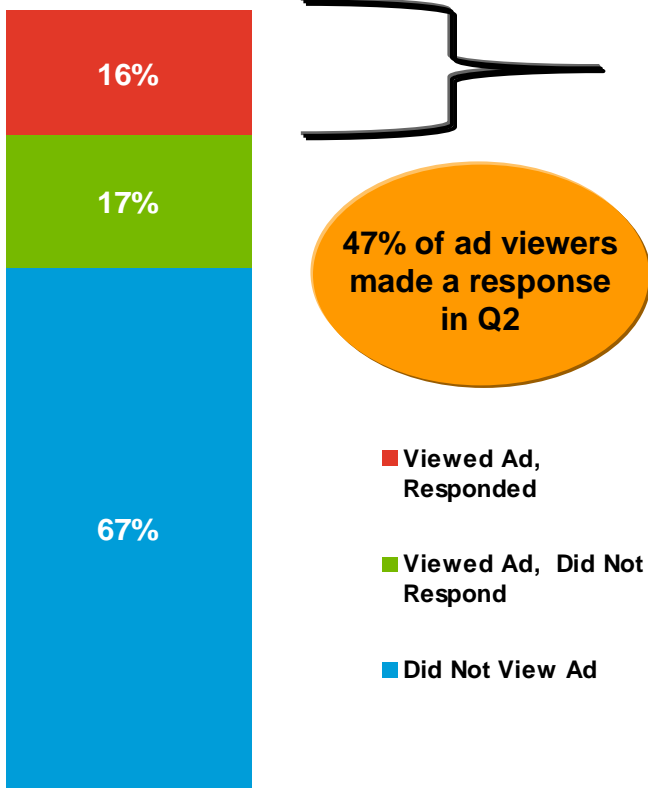
National – All Mobile Subscribers



SMS and MMS are the most popular forms of mobile advertising responses

Ad Recall and Response

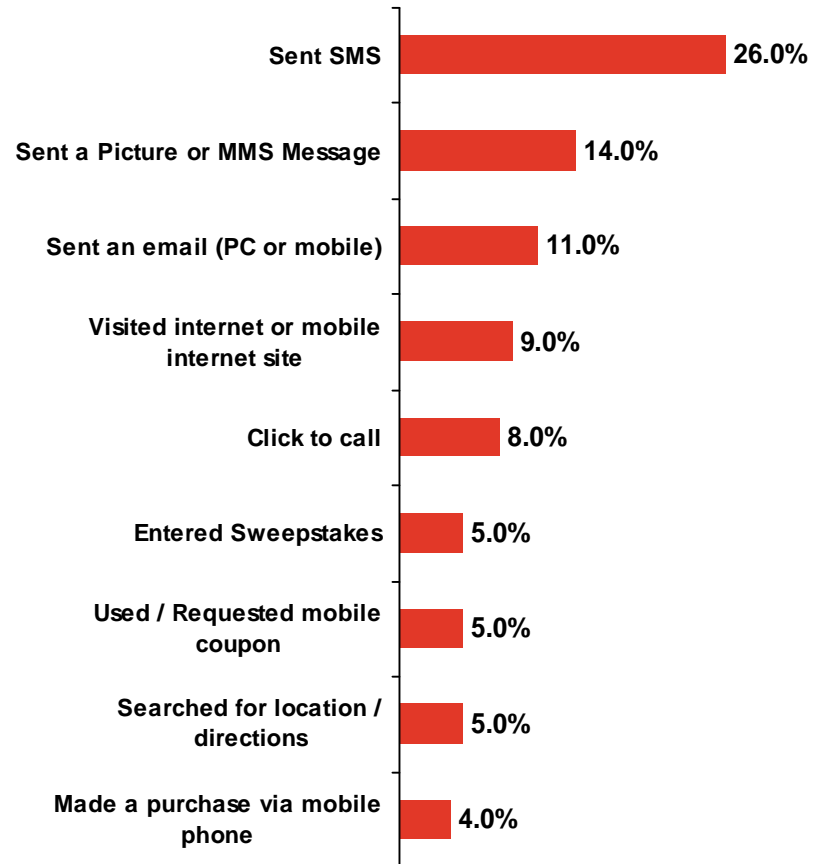
Q2 2009



Q2 2009

Top Responses Among Ad Responders

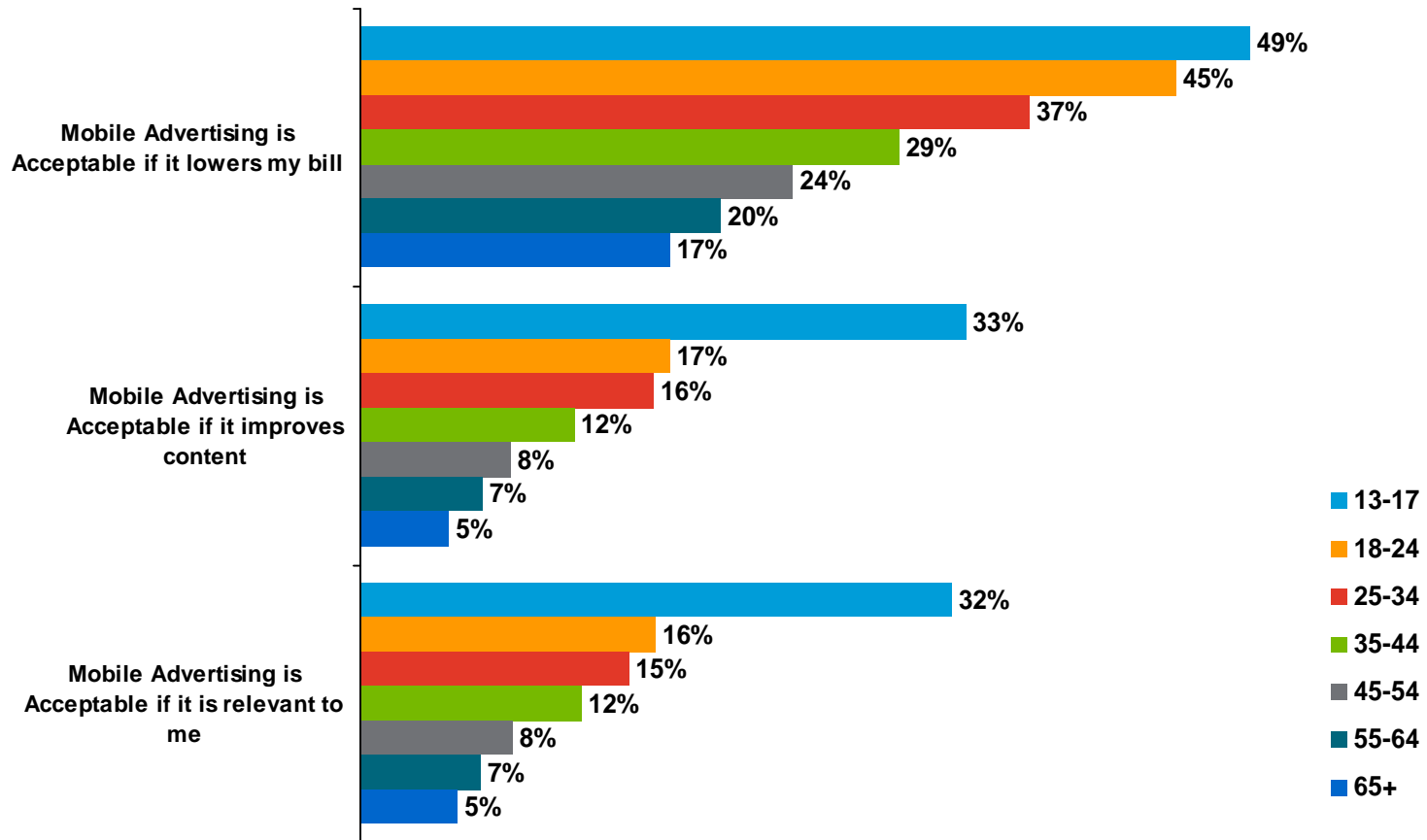
Q2 2009



Teens are most accepting of mobile advertising

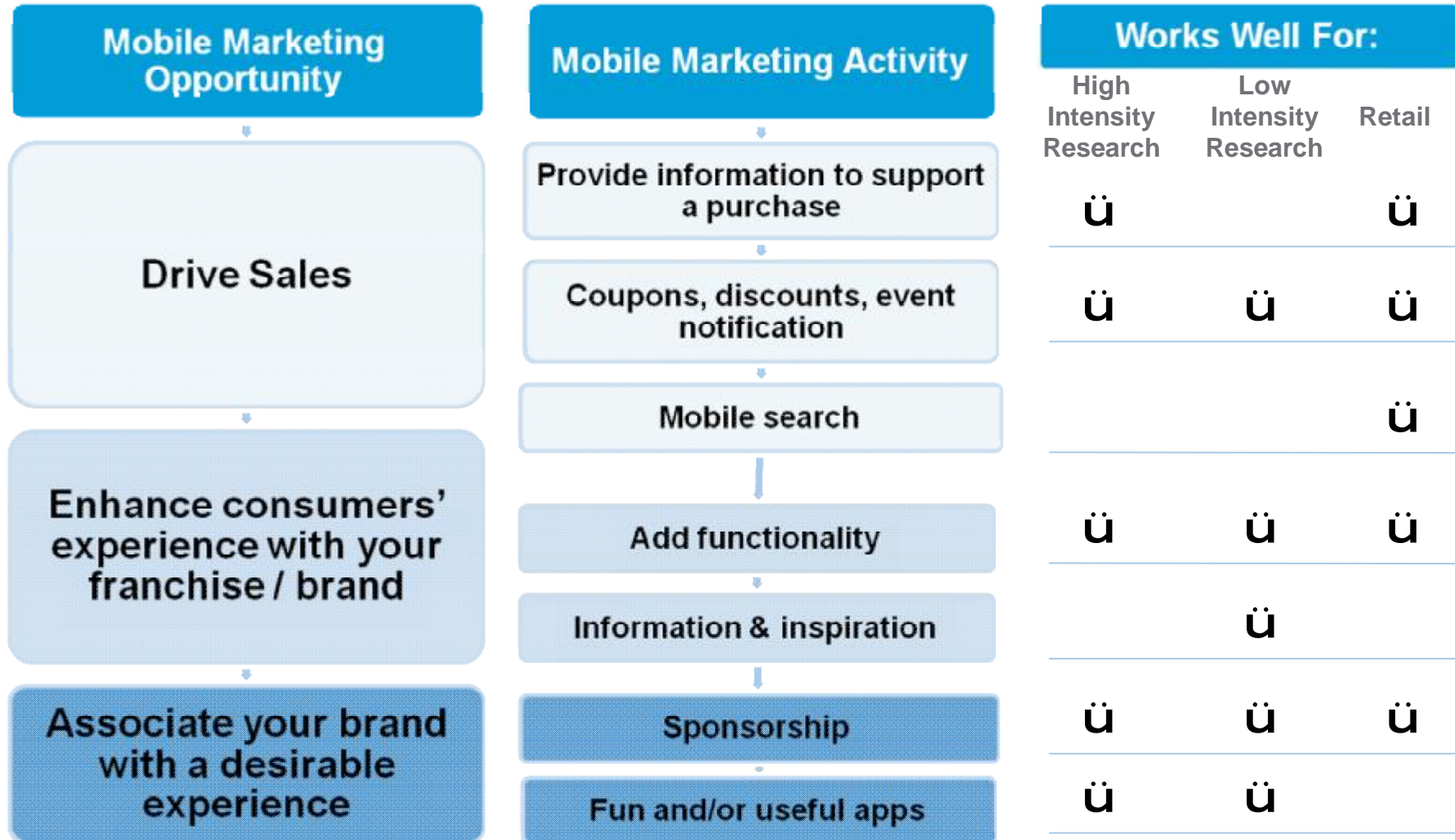
Perceptions of Mobile Advertising

US Q2 09



Mobile as a Marketing Channel

The way we're thinking about mobile marketing



Building a New Marketing Channel -- 4 types of metrics needed

1

Planning/Buying: Audience measuring/targeting

- Not just devices] people
- Campaign audience and reach
- Demographics (e.g. age, gender)
- Segmentation (e.g. PRIZM)
- % of audience that hit the target

“ESPN reaches X 21-34 yr old men that drink ML”

2

Post-Buy: Campaign audience performance/profile

- Not just impressions] people
- Campaign audience and reach
- Demographics (e.g. age, gender)
- Segmentation (e.g. PRIZM)
- % of audience that hit the target

“Via their mobile campaign Miller reached y million 21-34yr old men that drink ML”

3

Post-Buy: Ad effectiveness

- Brand impact
- Sales impact

“Miller’s mobile ad campaign had X% brand recall and resulted in y% sales lift in ML sales”

4

Advanced Cross-Media

Understanding/Segmentation

- Cross-media utilization
- Attaching lbs information (“Where you live”/ “Where you are”)

“Miller’s campaign reach with ML drinkers was increased by Z% by adding mobile”

“Miller can target Z million 21-34 yr old sports enthusiasts in NY via ESPN’s mobile website”

THANK YOU

