






# China 3G Trends Overview

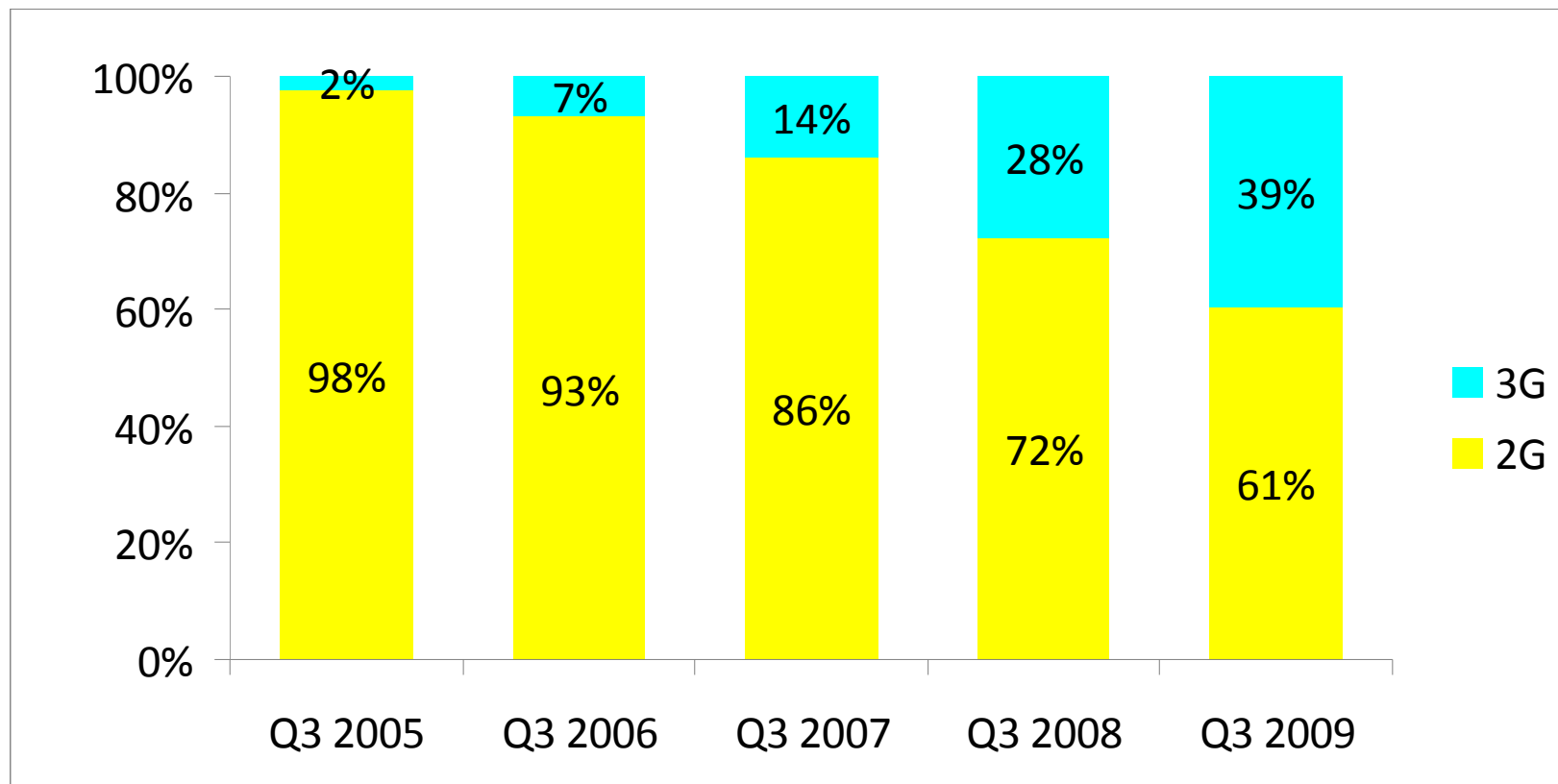
Shan Phillips, Nielsen

# China Is Just Launching 3G, Penetration Still Under 1%

	<u>Mobile</u>	<u>Fixed-line</u>	<u>Broadband</u>
 <p><b>中国移动通信</b> CHINA MOBILE 移动通信专家</p>	<p><b>502M Subs</b></p> <p><b>2G: GSM</b> <b>3G: TD-SCDMA</b></p>	<p>Small market share ,acquisition from China Tietong</p> <p><b>22M Subs</b></p>	<p><b>10M Subs</b></p>
 <p><b>中国电信</b> CHINA TELECOM 世界触手可及</p>	<p><b>44M Subs</b></p> <p><b>2G: CDMA</b> <b>3G: CDMA2000</b></p>	<p>Market leader in 20 provinces in South China</p> <p><b>198M Subs</b></p>	<p><b>50M Subs</b></p>
 <p><b>China unicom</b>中国联通</p>	<p><b>143M Subs</b></p> <p><b>2G: GSM</b> <b>3G: WCDMA</b></p>	<p>Market leader in 10 provinces In North China, Merged with China Netcom</p> <p><b>108M Subs</b></p>	<p><b>36M Subs</b></p>

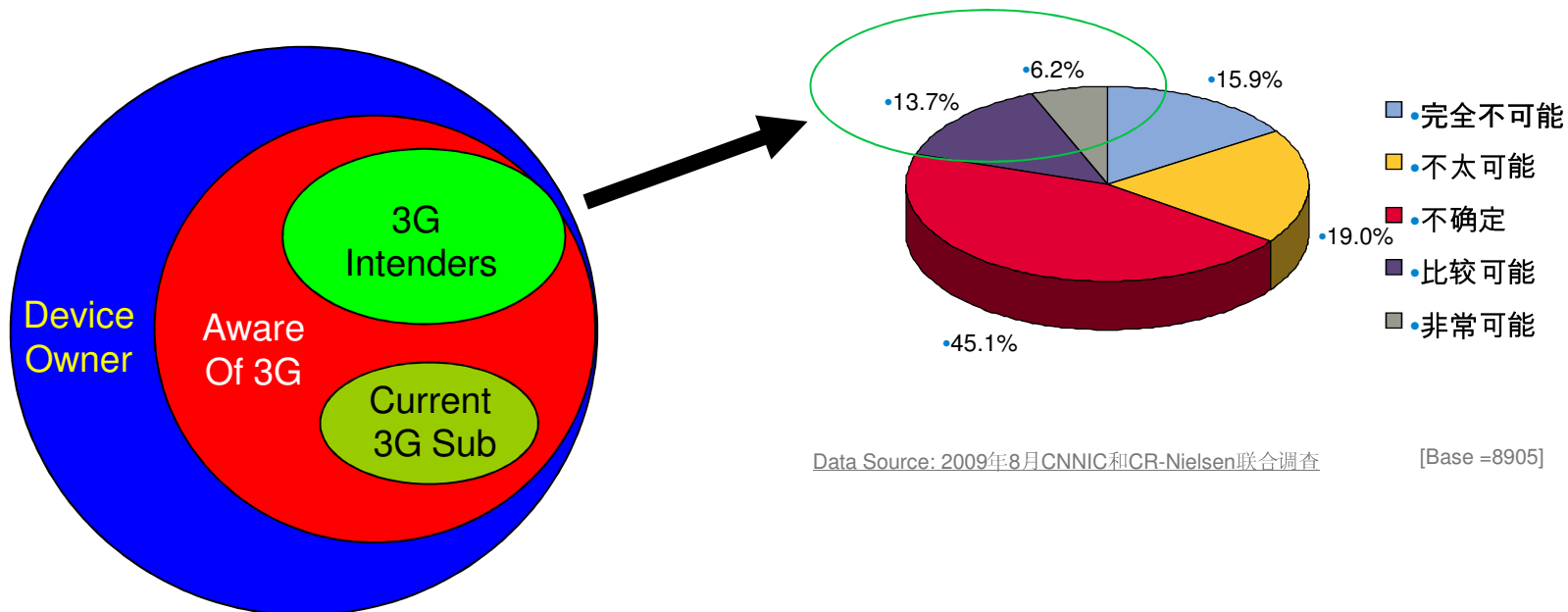
# 3G penetration in the United States is Nearing 40%...But that took 5 years

Total 3G penetration in the USA  
Q3 2005– Q3 2009

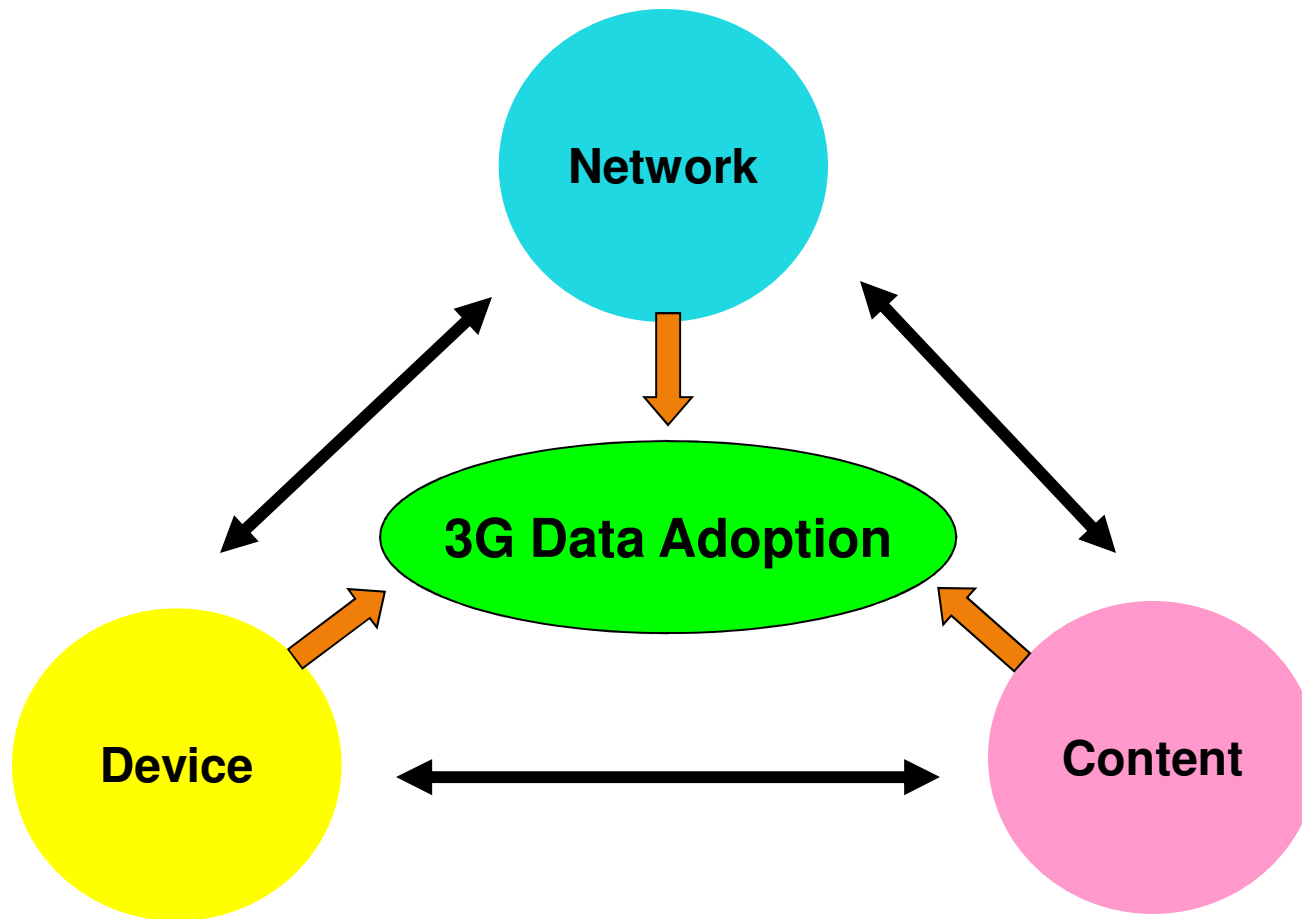


## 3G Market Potential Exists

- 710 million mobile SIMs
- 538 million mobile device owners (1.32 SIMS per person)
- 347 million are aware of 3G (64.5%)
- 20% of those who are aware say they are likely to adopt 3G in the next 6 months- 68 million potential 3G adopters “3G Intenders”



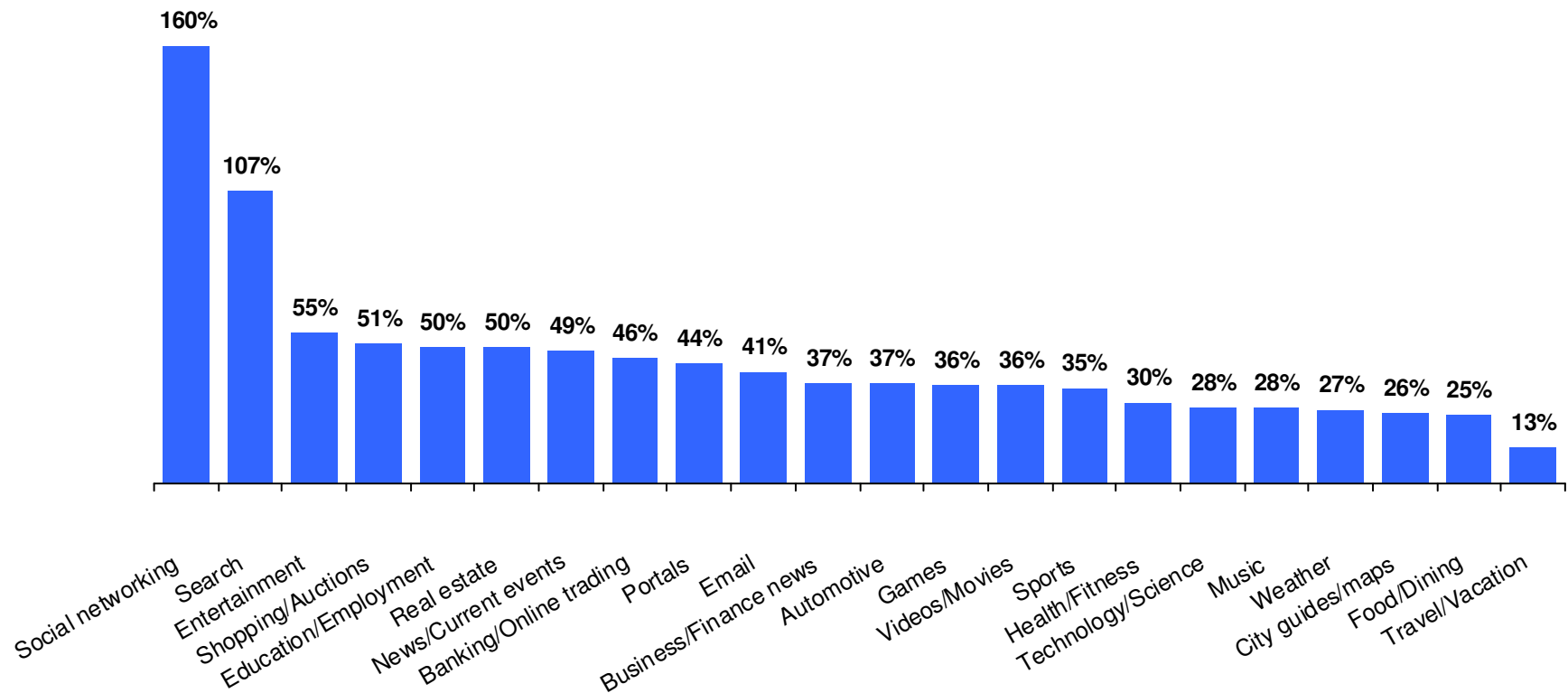
Consumers Demand Good Network (Quality and Price), Right Devices and Engaging Content to Embrace 3G



# There Is No More Engaging Content than Social Networking

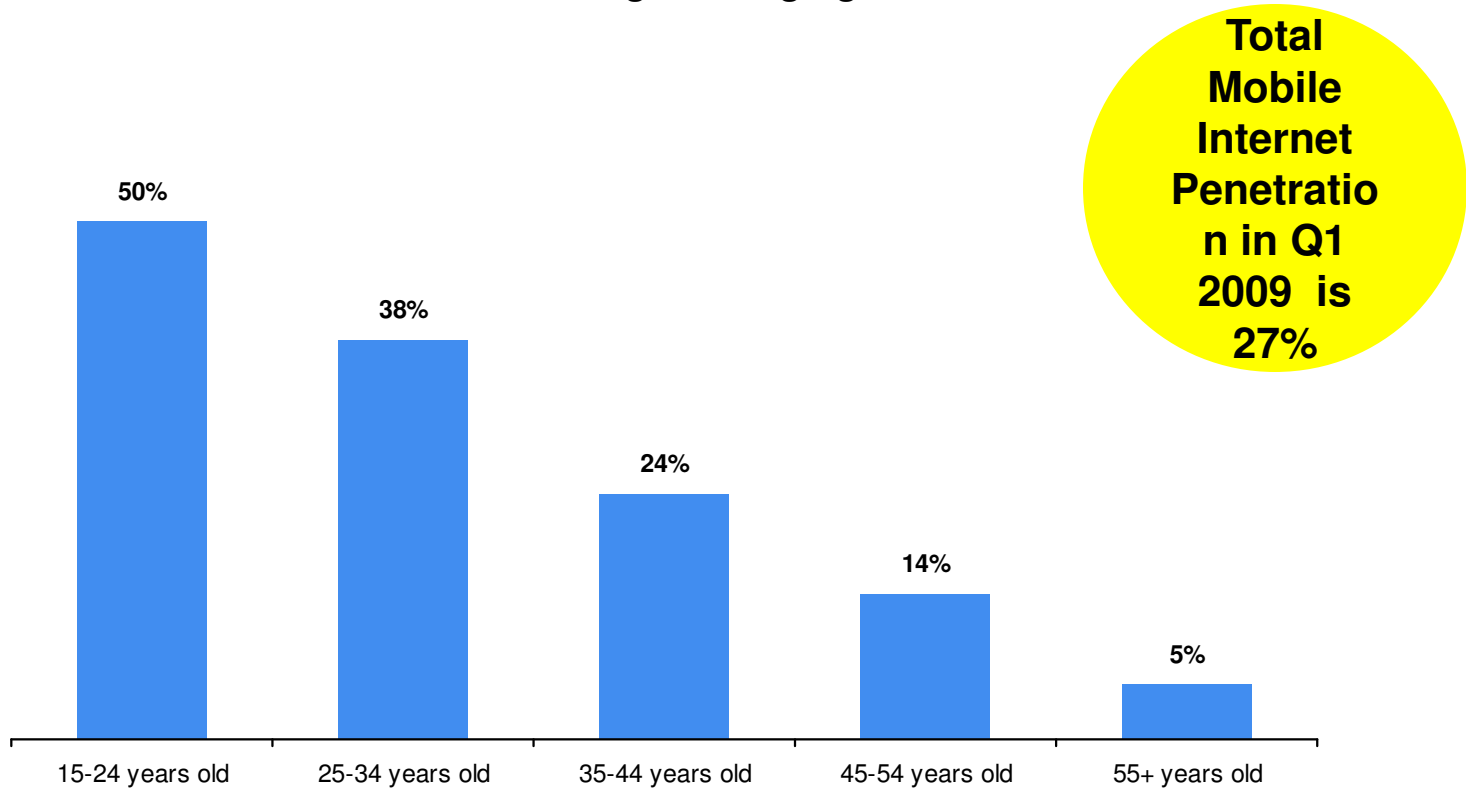
## Mobile Internet Audience Growth by Service Type

Jun 2009



# ...And The Young In China Lead the Way

### Mobile Internet Usage Among Age Breaks



Source: Nielsen China Mobile Media Marketplace Survey, Q1, '09

Unweighted Sample Size = 5280

■ Use of Mobile Internet