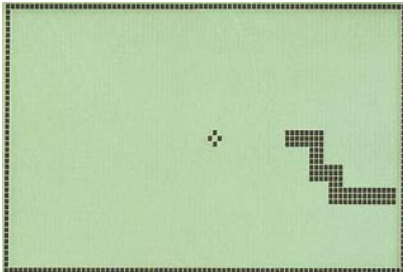


Evolution of Mobile Gaming

Exploring worldwide mobile gaming habits

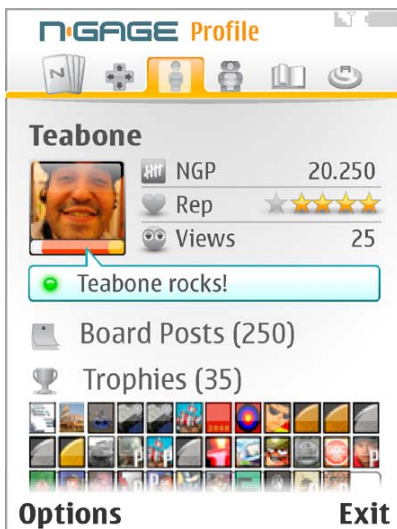


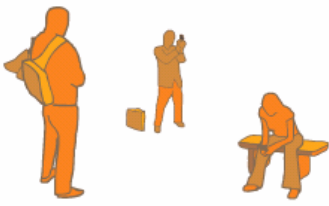
Mobile phone games have come a long way since Snake was first embedded in Nokia devices in 1997. Today, mobile phone owners have the opportunity to sample much more sophisticated mobile entertainment.



Starting next year, consumers can easily find, buy, play and manage great quality mobile games on the latest Nokia Nseries and other Nokia S60 devices. In preparation for the upcoming launch, Nokia has undertaken research to investigate current and future attitudes to mobile phone game consumption.

Nokia commissioned Nielsen Entertainment to conduct research in six countries worldwide. One hour interviews were carried out with 1,800 participants across China, Germany, India, Spain, Thailand and the United States. The findings provide a global overview of mobile phone gaming habits and what mobile phone gamers are looking for in the next generation of mobile gaming.

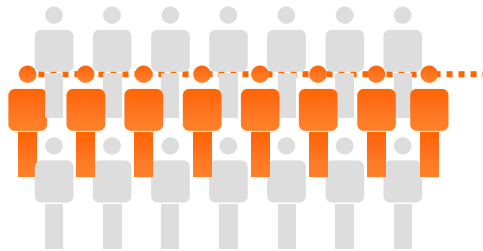




Key findings & methodology

Key Global Findings

- The mobile phone gamers surveyed are frequently playing mobile games with the vast majority (80%) playing at least once a week and 34% playing every day
- The average length of time spent playing mobile games is 28 minutes
- Nearly two thirds (63%) of the respondents preferred the richer experience of Nokia's next generation mobile games offering over existing Java 2D and Java 3D games offerings, particularly following game trials
- The majority (65%) would prefer to pay for a full game outright rather than buy a subscription (27%)
- When it comes to getting games, over-the-internet (OTI) distribution (34%) is almost as popular as over-the-air (OTA) distribution (45%)
- Multiplayer gaming is a regular part of mobile phone gamers lifestyles with 45% playing multiplayer games on their mobile phones at least once a month
- 62% would send demos of games they like directly to their friends and 79% would try a demo received from a friend



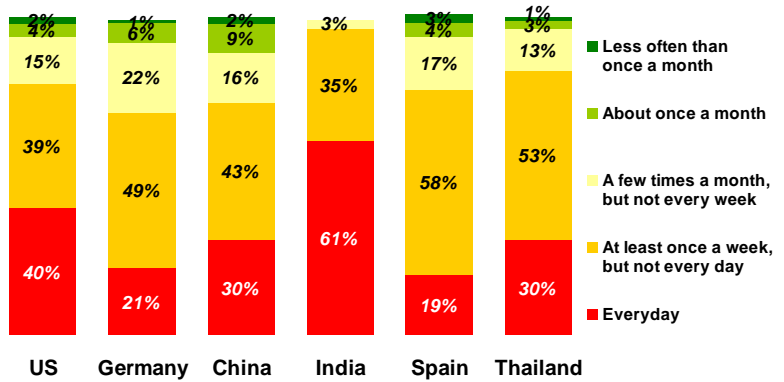
Methodology

- 1,800 respondents were interviewed across six countries between April and June 2006
- 300 face-to-face interviews conducted in each of the following countries: China, Germany, India, Spain, Thailand and the United States
- The 300 respondents in each territory included an equal sample of:
 - mobile phone owners that play mobile games and exhibit high social mobile gaming activity
 - mobile phone owners that play mobile games and exhibit low to medium social mobile gaming activity
 - mobile phone owners who do not play games on their phone, but do not reject the idea
- Male/female ratio across all territories was approximately 2:1 (male 67%, female 33%)
- The average age of respondents across all territories was between 26 and 27 years

Play more, play longer

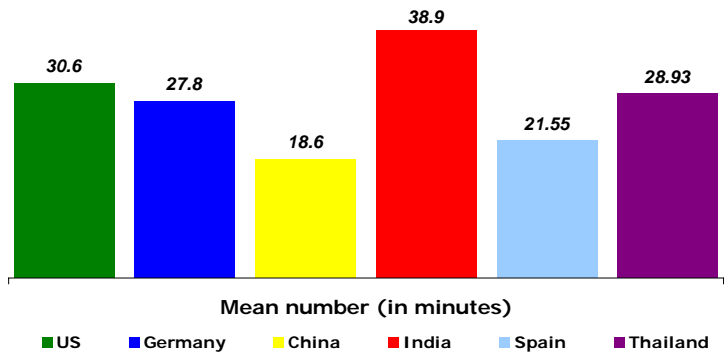
The vast majority of mobile gamers play at least once a week

80% of respondents play games on their mobile phones at least once a week, while 34% indicate that they play everyday.



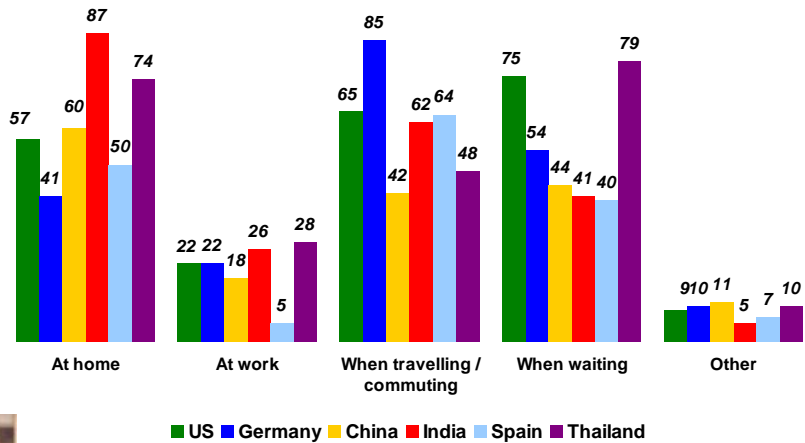
Gamers dedicate time for mobile gaming

An average mobile gaming session is 28 minutes.

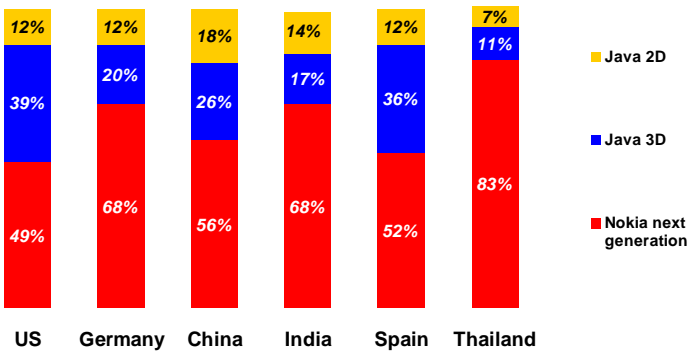


Gaming at home and on the move

Mobile phone games are played almost as much on the move (61%) and while waiting (56%) as they are at home (62%).

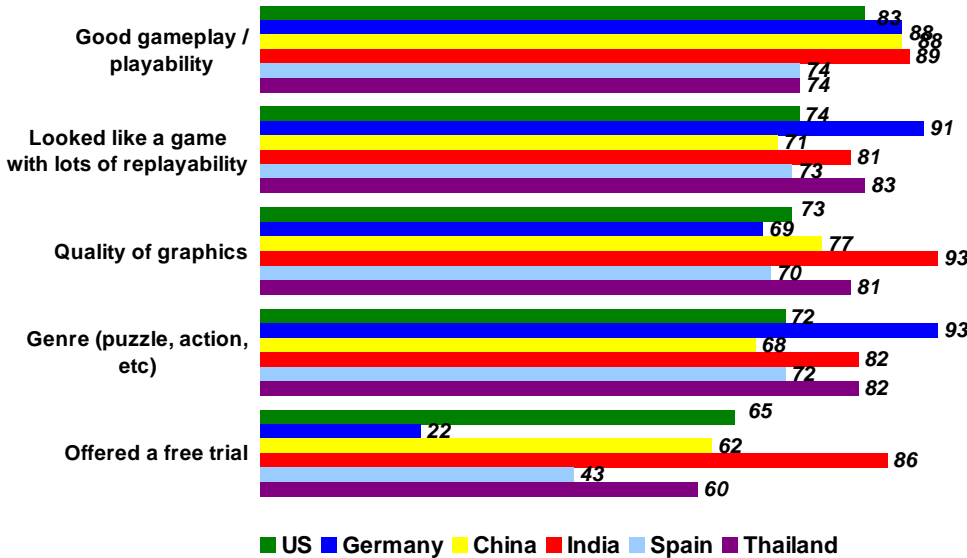


Next generation appeal



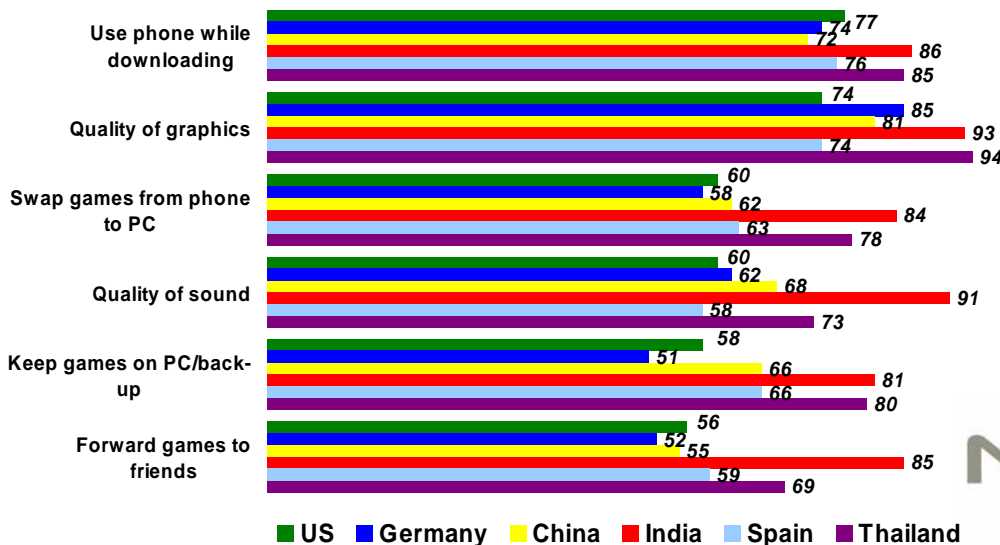
Strong appeal for Nokia's next generation mobile games and experience

Over half (63%) preferred Nokia's next generation mobile games offering over Java 2D and Java 3D games offerings, particularly following game trials.



Key purchase motivators of mobile gamers

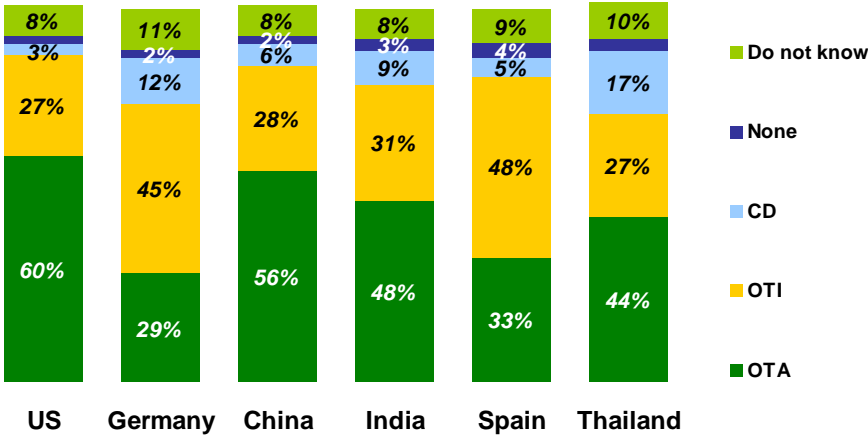
Good gameplay (83%) and replayability (79%) and game genre (78%) are key motivators when considering which mobile games to purchase.



Key play motivators of Nokia's next generation gaming platform

Graphical quality (84%) and using the phone for other purposes while downloading (78%) were found to be the most important features when deciding to play Nokia's next generation mobile games.

Try before you buy

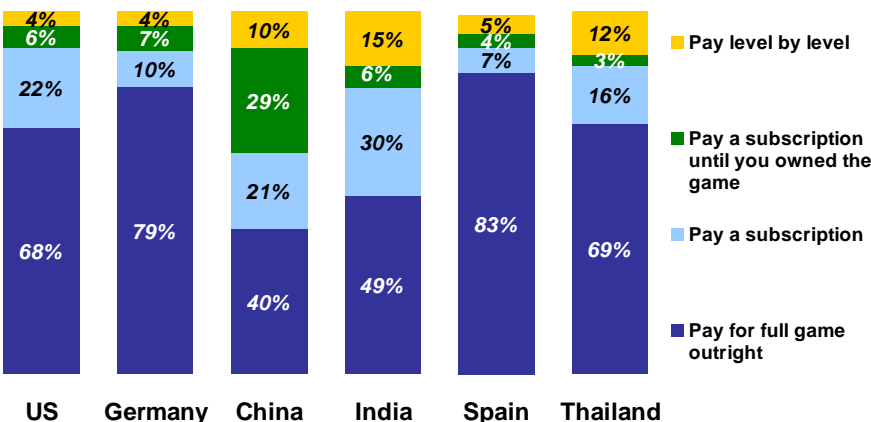
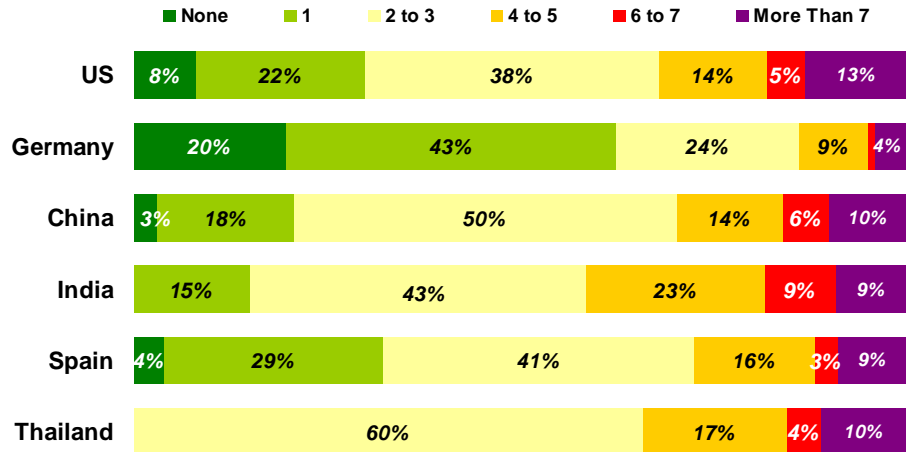


Preferred method to find and download games

Over-the-internet (OTI) distribution (34%) is generally as popular as over-the-air (OTA) distribution (45%).

Trial preferences

If given the opportunity to trial a game before buying it, most (43%) would prefer to trial two to three games per week as opposed to only one (21%).



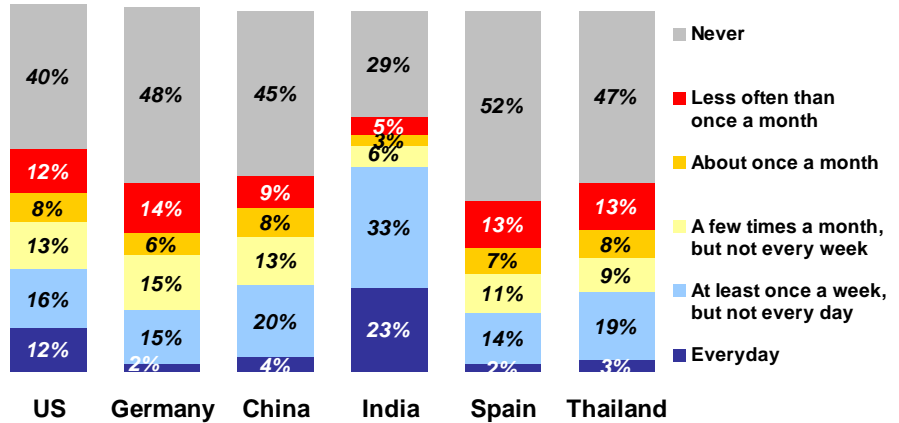
Full game purchase preferred

The majority (65%) would pay for the full game outright rather than by subscription (27%).

Connect, compete and share

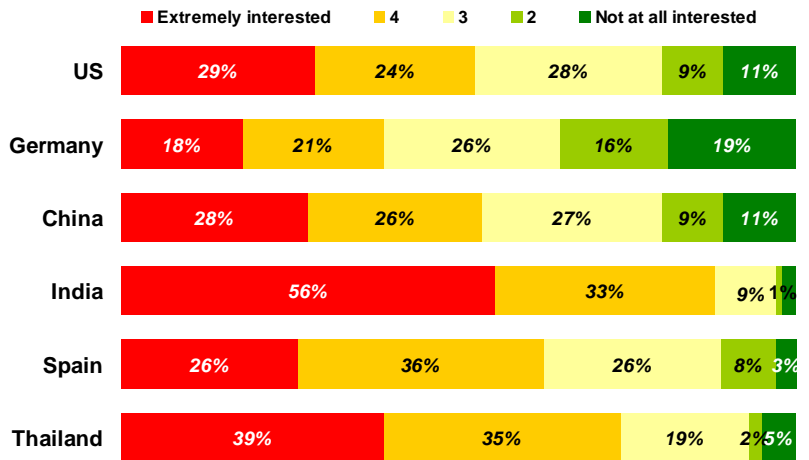
More gamers are playing multiplayer games on their mobile phones

45% play multiplayer games on their mobile phones at least once a month.



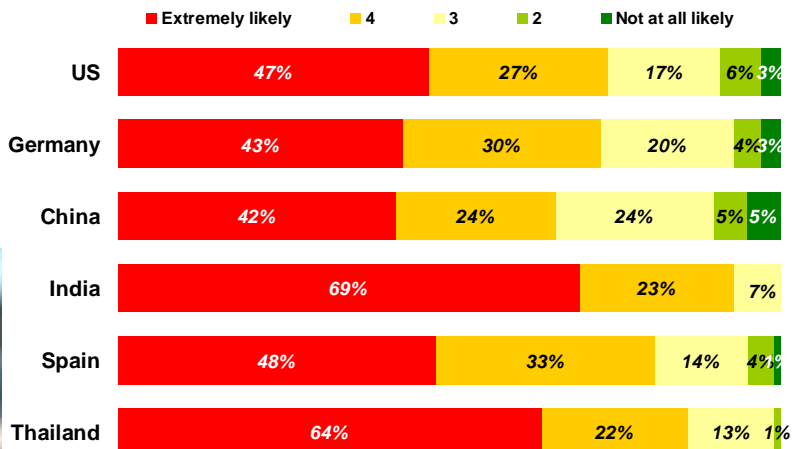
Players want to share game demos with friends

62% would send demos of games they like directly to friends if possible.



Personal recommendation is key

79% feel they would try a demo received from a friend.





Evolution of Mobile Gaming

Exploring worldwide mobile gaming habits

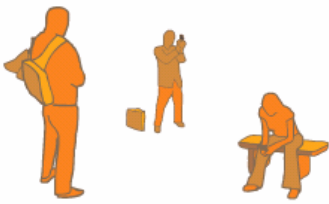
Country by country breakdown

China

- The majority of Chinese respondents (73%) play mobile games at least once a week with the average session lasting 18.6 minutes.
- Typically, 60% prefer to play at home followed by playing while travelling/commuting (42%) and while waiting (44%).
- Nokia's next generation mobile gaming option is preferred (56%) over its Java 2D (18%) and Java 3D (26%) counterparts.
- Good gameplay (88%) and the quality of graphics (77%) are key motivators when considering which mobile games to purchase.
- Quality of graphics (81%) and using the phone while downloading (72%) are the most important features when deciding to play Nokia's next generation mobile games.
- Over half (56%) would prefer to get their games over-the-air (OTA) while 28% would prefer to get them over-the-internet (OTI).
- If given an opportunity to trial a game before buying it, 50% would prefer to trial two to three games per week as opposed to only one (18%).
- Paying for a full game outright is preferred (40%) compared to paying by subscription (50%) and paying by the level (10%).
- 24% play multiplayer games on their mobile phones at least once a week.
- 54% are interested in sending demos of games to friends while 66% are likely to trial games sent by friends.

Germany

- The majority of German respondents (70%) play mobile games at least once a week with the average session lasting 27.8 minutes.
- The vast majority (85%) prefer to play while travelling/commuting followed by playing while waiting (54%). 41% prefer to play while at home.
- Nokia's next generation mobile gaming option is preferred (68%) over its Java 2D (12%) and Java 3D (20%) counterparts.
- Genre (93%) and replayability (91%) are key motivators when considering which mobile games to purchase.
- Quality of graphics (85%) and using the phone while downloading (74%) are the most important features when deciding to play Nokia's next generation mobile games.
- More than a quarter (29%) would prefer to get their games over-the-air (OTA) while almost half (45%) would prefer to get them over-the-internet (OTI).
- If given an opportunity to trial a game before buying it, 43% would prefer to trial two to three games per week as opposed to only one (20%).
- Paying for a full game outright is strongly preferred (79%) compared to paying by subscription (17%) and paying by the level (4%).
- Only 17% play multiplayer games on their mobile phones at least once a week.
- 39% are interested in sending demos of games to friends while 73% are likely to trial games sent by friends.

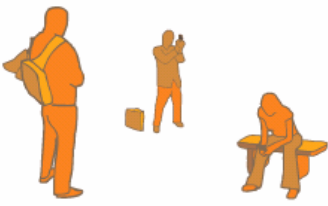


India

- The vast majority of Indian respondents (96%) play mobile games at least once a week with the average session lasting 38.9 minutes.
- Typically, 87% prefer to play at home followed by playing while travelling/commuting (62%) and while waiting (41%).
- Nokia's next generation mobile gaming option is preferred (68%) over its Java 2D (14%) and Java 3D (17%) counterparts.
- Quality of graphics (93%) and good gameplay (89%) are key motivators when considering which mobile games to purchase.
- Quality of graphics (93%) and quality of sound (91%) are the most important features when deciding to play Nokia's next generation mobile games.
- Almost half (48%) would prefer to get their games over-the-air (OTA) while 31% would prefer to get them over-the-internet (OTI).
- If given an opportunity to trial a game before buying it, 43% would prefer to trial two to three games per week as opposed to only one (15%).
- Paying for a full game outright (49%) is a more popular option than paying by subscription (36%). Only 15% prefer to pay by the level.
- 23% play multiplayer games on their mobile phones everyday while 33% play at least once a week but not everyday.
- 89% are interested in sending demos of games to friends while 92% are likely to trial games sent by friends.

Spain

- The majority of Spanish respondents (77%) play mobile games at least once a week with the average session lasting 21.6 minutes.
- Typically, 64% prefer to play while travelling/commuting followed by playing at home (50%) and while waiting (40%).
- Nokia's next generation mobile gaming option is preferred (52%) over its Java 2D (12%) and Java 3D (36%) counterparts.
- Good gameplay (74%) and replayability (73%) are key motivators when considering which mobile games to purchase.
- Using the phone while downloading (76%) and quality of graphics (74%) are the most important features when deciding to play Nokia's next generation mobile games.
- 33% would prefer to get their games over-the-air (OTA) while the majority (48%) would prefer to get them over-the-internet (OTI).
- If given an opportunity to trial a game before buying it, 41% would prefer to trial two to three games per week as opposed to only one (29%).
- Paying for a full game outright (83%) is strongly preferred over paying by subscription (11%). Only 5% prefer to pay by the level.
- 16% play multiplayer games on their mobile phones at least once a week.
- 62% are interested in sending demos of games to friends while 81% are likely to trial games sent by friends.



Thailand

- The majority of Thai respondents (83%) play mobile games at least once a week with the average session lasting 28.9 minutes.
- Typically, 79% prefer to play while waiting followed by playing at home (74%) and while travelling/commuting (48%).
- Nokia's next generation mobile gaming option is strongly preferred (83%) over its Java 2D (7%) and Java 3D (11%) counterparts.
- Game replayability (83%) and genre of game (82%) are key motivators when considering which mobile games to purchase.
- Quality of graphics (94%) and using the phone while downloading (85%) are the most important features when deciding to play Nokia's next generation mobile games.
- 44% would prefer to get their games over-the-air (OTA) while 27% would prefer to get them over-the-internet (OTI).
- If given an opportunity to trial a game before buying it, 60% would prefer to trial two to three games per week while 17% would prefer to trial four to five games per week.
- Paying for a full game outright (69%) is preferred over paying by subscription (19%). Only 12% prefer to pay by the level.
- 22% play multiplayer games on their mobile phones at least once a week.
- 74% are interested in sending demos of games to friends while 86% are likely to trial games sent by friends.

United States

- The majority of US respondents (79%) play mobile games at least once a week with the average session lasting 30.6 minutes.
- Typically, 75% prefer to play while waiting followed by playing while travelling/commuting (65%) and at home (57%).
- Nokia's next generation mobile gaming option is preferred (49%) over its Java 2D (12%) and Java 3D (39%) counterparts.
- Good gameplay (83%) and replayability (74%) are key motivators when considering which mobile games to purchase.
- Using the phone while downloading (77%) and quality of graphics (74%) are the most important features when deciding to play Nokia's next generation mobile games.
- 60% would prefer to get their games over-the-air (OTA) while 27% would prefer to get them over-the-internet (OTI).
- If given an opportunity to trial a game before buying it, 38% would prefer to trial two to three games per week as opposed to only one (22%).
- Paying for a full game outright (68%) is preferred over paying by subscription (28%). Only 4% prefer to pay by the level.
- 28% play multiplayer games on their mobile phones at least once a week.
- 53% are interested in sending demos of games to friends while 74% are likely to trial games sent by friends.