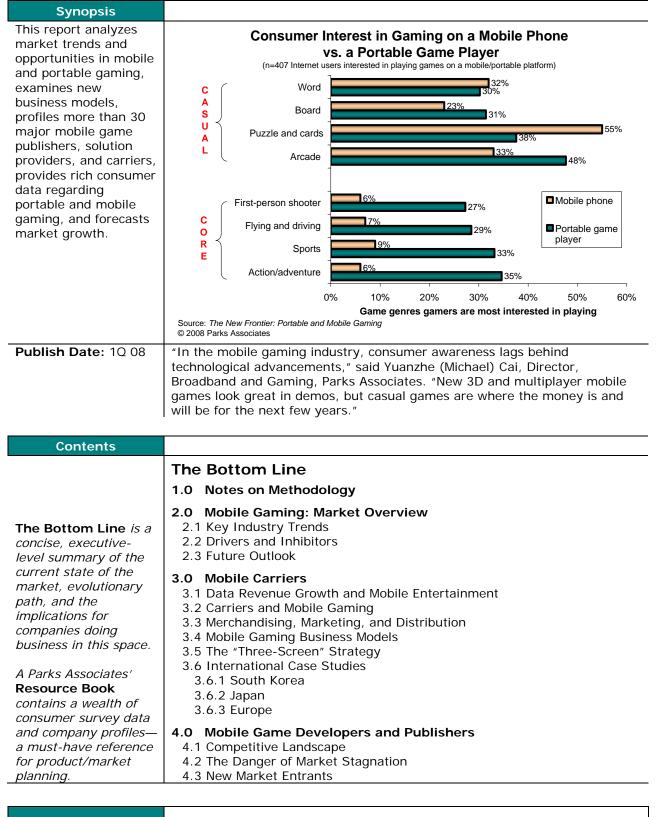


#### The New Frontier: Portable and Mobile Gaming

By Yuanzhe (Michael) Cai, Director, Broadband and Gaming

1Q 2008



© 2008 Parks Associates. All rights reserved.



\_

# The New Frontier: Portable and Mobile Gaming

By Yuanzhe (Michael) Cai, Director, Broadband and Gaming

1	Q	2008

<ul><li>4.4 To License or Not To License</li><li>4.5 Industry Consolidation</li><li>4.6 The Casual Focus</li><li>4.7 Off-Deck Channels</li><li>4.8 Porting as a Core Competency</li></ul>
<ul> <li>5.0 Innovation: Technology, Content, and Business Model</li> <li>5.1 Connected and Multiplayer Mobile Gaming</li> <li>5.2 Pervasive (Cross Platform) Gaming</li> <li>5.3 BREW, N-Gage, and Xbox Live Anywhere</li> <li>5.4 Mobile In-Game Advertising</li> <li>5.5 Putting "Mobile" Back Into "Mobile Gaming"</li> <li>5.6 3D Mobile Gaming</li> <li>5.7 Other Relevant Technology Developments</li> <li>5.7.1 IMS</li> <li>5.7.2 Flash Lite</li> <li>5.7.3 Location-based Gaming</li> </ul>
<ul> <li>6.0 Portable Gaming</li> <li>6.1 Key Market Trends</li> <li>6.2 Potential for a New Market Entrant</li> <li>6.3 Convergence or Collision: Mobile and Portable Gaming</li> </ul>
7.0 Market Forecasts
8.0 Key Recommendations
<ul> <li>Resource Book</li> <li>1.0 Mobile Phone as a Gaming Platform</li> <li>1.1 Mobile Gaming vs. Other Mobile Applications</li> <li>1.2 Mobile Gaming vs. Other Gaming Platforms</li> </ul>
<ul> <li>2.0 Profile of a Mobile Gamer</li> <li>2.1 Adoption of Mobile Gaming</li> <li>2.2 Mobile Gaming and Carriers</li> <li>2.3 Mobile Gaming and Smart Phone Ownership</li> <li>2.4 Perceived Importance of Mobile Gaming</li> <li>2.5 Expected Change in Gaming Expenditure</li> <li>2.6 Perspectives on Mobile Game Advertising</li> <li>2.7 Dominant Mobile Gaming Genres</li> <li>2.8 Multiplayer and Cross-Platform Mobile Gaming</li> </ul>
<ul> <li>3.0 Portable Game Players</li> <li>3.1 Adoption and Purchase Intention</li> <li>3.2 Portable Game Software</li> <li>3.3 Potential for a New Market Entrant</li> <li>3.4 Portable Gaming vs. Mobile Gaming</li> </ul>
<b>4.0 Global Consumer Data</b> 4.1 Mobile Gaming 4.2 Portable Gaming
5.0 Profiles of Mobile Carriers 5.1 AT&T Wireless 5.2 Sprint 5.3 Verizon Wireless



# The New Frontier: Portable and Mobile Gaming

By Yuanzhe (Michael) Cai, Director, Broadband and Gaming

1Q 2008

<ul> <li>6.0 Profiles of Portable and Mobile Game Publishers</li> <li>6.1 Capcom Interactive, Inc.</li> <li>6.2 Digital Chocolate</li> <li>6.3 EA Mobile</li> <li>6.4 Gameloft</li> <li>6.5 Glu Mobile</li> <li>6.6 Hands-On Mobile</li> <li>6.7 Jamster, LLC</li> <li>6.8 NAMCO Networks America, Inc.</li> <li>6.9 Oberon Media / I-Play</li> <li>6.10 Nintendo Entertainment America</li> <li>6.11 PopCap Games</li> <li>6.12 RealNetworks</li> <li>6.13 Sony Pictures Mobile / Sony Ericsson &amp; Sony Computer Entertainment America</li> <li>6.14 THQ Wireless</li> <li>6.15 Vivendi Games Mobile</li> </ul>
<ul> <li>7.0 Profiles of Technology Companies</li> <li>7.1 Amobee Media Systems</li> <li>7.2 Exit Games</li> <li>7.3 Greystripe, Inc.</li> <li>7.4 Hovr</li> <li>7.5 Microsoft</li> <li>7.6 Motricity, Inc.</li> <li>7.7 Nokia</li> <li>7.8 Qualcomm, Inc.</li> <li>7.9 Sun Microsystems / Java</li> <li>7.10 Tira Wireless</li> </ul>

Figures	
	The Bottom Line
	Key Drivers and Inhibitors for Mobile Gaming
	Percentage of Data ARPU: U.S. Carriers
	Mobile Phone: Features Never Used (Q2/07)
	Important Influencers for Choosing a Mobile Service Provider
	Carrier Deck Size & Top Sellers
	Competitive Analysis: Key Mobile Game Publishers
	Growth of Leading Mobile Gaming Companies
	Percentage of Mobile Phone Users (among Internet Households) That Have
	Paid to Download Games in the Past 12 Months
	Leading Media Companies: Mobile Gaming Initiatives
	Key Licensing Partnerships
	Recent Mergers and Acquisitions in the Mobile Gaming Industry
	Consumer Interest in On-the-go Gaming
	Social Network/Avatar-based Mobile Games
	Interest in Multiplayer, Connected, and Community Gaming Applications
	Multiplayer Mobile Gaming Platforms
	Interest in Pervasive Gaming Very High among Core Gamers
	Mobile Game Advertising Solution Providers
	Innovative Mobile Games
	Unit Sales of Nintendo DS and Sony PSP (Fiscal Year 2006-2008)

© 2008 Parks Associates. All rights reserved.



# The New Frontier: Portable and Mobile Gaming

1Q 2008

By Yuanzhe (Michael) Cai, Director, Broadband and Gaming

Sales of Nintendo Portable Game Players in Different Regions (Fiscal Year 2003-2007)
Portable Game Players: Brand Mindshare (Q2/07)
Top Desired Features on a New PGP among PGP Owners and Intenders
Correlation between Portable Console and Mobile Phone Gaming
Forecast of Mobile Service Subscribers and Paying Mobile Gamers (2007-
2012)
Forecast of U.S. Mobile Gaming Revenue (2007-2012)
U.S. Households with at Least One Portable Game Player
Unit Sales of Portable Game Players
, ,
Resource Book
Mobile Phone: Entertainment Features
Usage of Various Mobile Applications
Mobile Phone: Features Never Used
Devices Used for Gaming
Number of Hours Spent on Various Gaming Devices
Comparison of Gaming Time across Platforms
Gaming Time by Platform: Percentile Analysis
Average Gaming Session Length by Platform
Gaming Hour Allocation by Platform: by Age Groups
How Do Different Gamer Groups Allocate Gaming Time
Percentage of Gamers Planning to Increase Mobile Game Spending in the
Next 12 Months
Adoption of Paid Mobile Game Downloads
Frequent Mobile Gamers Are More Likely to Download Number of Mobile Games Downloaded in the Last 12 Months
Mobile Gaming Adoption by Gender
Mobile Gaming Adoption by Age Mobile Gaming Adoption by Gender: Q2 2005 vs. Q2 2007
Mobile Gaming Adoption by Gendel: 02 2005 vs. 02 2007 Mobile Gaming Adoption by Age: 02 2005 vs. 02 2007
Number of Gaming Sessions on Portable Players: by Age and Gender
Number of Gaming Sessions on a Mobile Phone: by Age and Gender
Gaming Outside of the Home: by Gender and Age
Important Influencers for Choosing a Mobile Service Provider
Percentage of Mobile Game Downloaders and Mean Number of Games
Downloaded by Carrier Brands
Mobile Gaming Behavior among Smart Phone Owners vs. Regular Mobile
Phone Owners
Satisfaction with Internet Browsing Experience on a Mobile Phone: Smart
Phone vs. Regular Phone
Perceived Importance of Different Capabilities on a Mobile/Portable Device
Perceived Importance of Mobile and Portable Gaming by Age
Expected Change in Mobile Gaming Expenditure
Expected Change in Mobile Gaming Expenditure: by Age
Mobile Phone: Service Subscription Intention
Consumer Sentiment about Mobile Advertising
Consumer Perspectives on Mobile Advertising
Ad-Supported Mobile Applications Boost Consumer Interest
Interest in Ad-Supported Mobile Services by Gender
Interest in Ad-Supported Mobile Services by Age
Interest in Ad-Supported Mobile Gaming by Perceived Importance of Mobile
Gaming



#### The New Frontier: Portable and Mobile Gaming

By Yuanzhe (Michael) Cai, Director, Broadband and

Gaming	1Q 2008
Interest in Ad-Supported Mobile Gaming: Paying vs. Non-Payin Downloaders Interest in Ad-Supported Mobile Gaming by Downloading Freq Interest in Various Game Genres on Different Portable Devices Interest in Multiplayer, Connected, and Community Gaming Ap Interest in Mobile Gaming Features by Gender Interest in Pervasive Gaming Very High among Core Gamers Interest in New MMOG Game Services Ownership of Different Portable Game Players Purchase Intention for Different Portable Game Players Interest in a New Portable Game Player by Gender Monthly Expenditure on Gaming Time Spent on Playing New vs. Old Games Number of Games Owned Personally Average Number of Games Played Personally Portable Game Players: Brand Mindshare Preferred Brand for New Portable Game Player by Current Owr Preferred Brand for a Portable Game Player by Gender Portable Game Player Ownership by Game Console Ownership Gamers with Both Fixed and Portable Consoles Spend More Mo Software Top Desired Features for a New PGP among PGP Owners and I Important Features on a PSP and Portable Multimedia Player Correlation between Portable Console and Mobile Phone Gamin Mobile Gamers More Likely to Own Portable Game Players	ng uency splications hership oney on ntenders
	-
Weekly Mobile Gaming Activities Mobile Gaming Adoption in 13 Countries: by Age and Gender Ownership of Portable Game Players in 13 Countries	
 Portable Game Player Ownership in 13 Countries: by Age and Adoption of Portable Gaming among 13 Countries High Intender for Portable Game Players in 13 Countries	Gender

Attributes	
Parks Associates	Authored by Yuanzhe (Michael) Cai
5310 Harvest Hill Road	Executive Editor: Tricia Parks
Suite 235	Published by Parks Associates
Lock Box 162	
Dallas TX 75230-5805	© January 2008 Parks Associates
	Dallas, Texas 75230
800.727.5711 toll free	
972.490.1113 phone	All rights reserved. No part of this book may be reproduced, in any form or
972.490.1133 fax	by any means, without permission in writing from the publisher.
parkaasaasiataa aam	Drinted in the United States of America
parksassociates.com sales@	Printed in the United States of America.
parksassociates.com	Disclaimer
	Parks Associates has made every reasonable effort to ensure that all
	information in this report is correct. We assume no responsibility for any
	inadvertent errors.