

INSIGHTS

JiWire Mobile Audience Insights Report

July-September 2009

JiWire is the leading Mobile Audience Media company, combining location and audience data to deliver targeted advertising across premium locations and wireless devices.

This Insights report provides a snapshot of usage trends and audience data over public Wi-Fi for the third quarter of 2009. This report is intended to highlight market trends for advertisers.

JiWire's Wi-Fi Media Channel is comprised of over 30,000 public Wi-Fi locations through partnerships with over 30 leading wireless broadband telecommunications providers, with venues such as airports, hotels and cafés that serve over 20 million unique users monthly. JiWire's registry of public Wi-Fi locations includes over 280,000 public Wi-Fi locations in 140 countries.

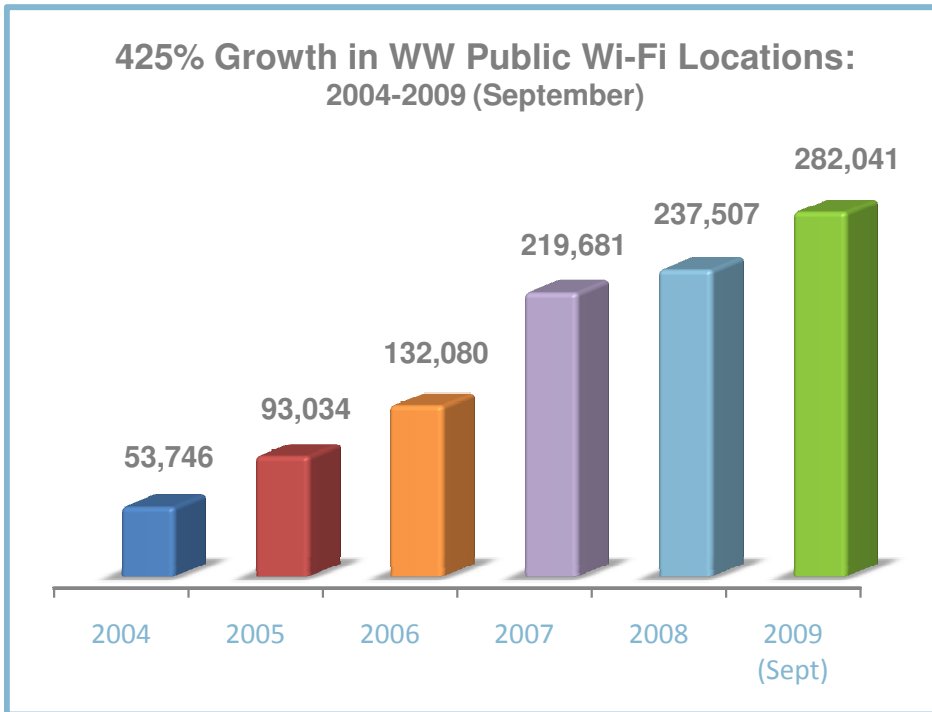
JiWire has been reaching on-the-go audiences since 2003.

For questions about this report, or for recommendations for future reports, please contact us at Insights@jiwire.com.

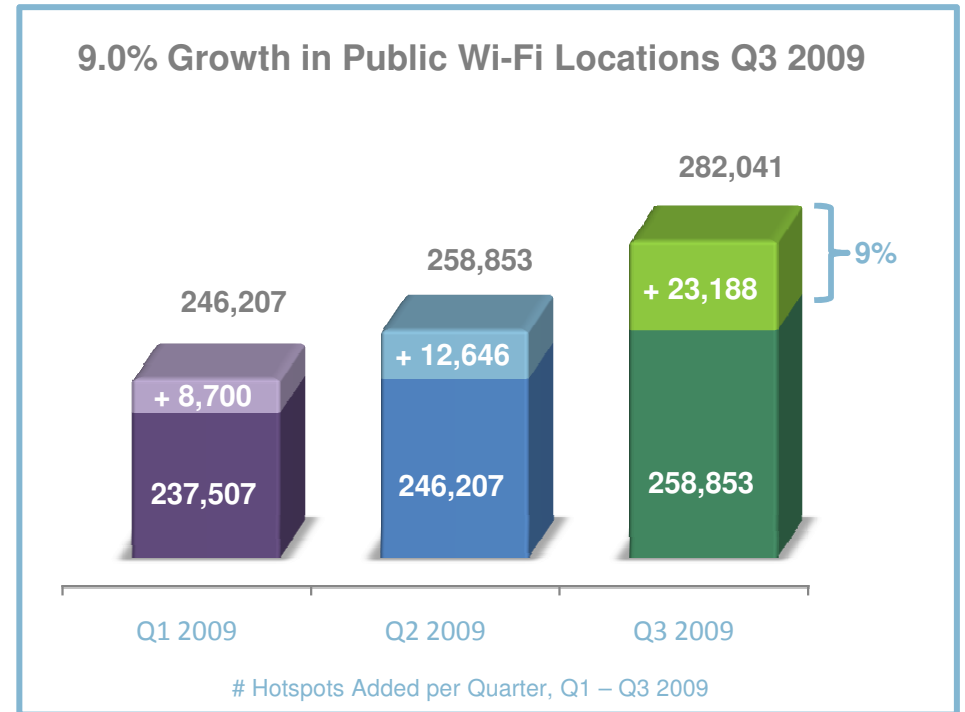


Wi-Fi Media Channel: Highlights

Worldwide Public Wi-Fi Locations: 2004-2009



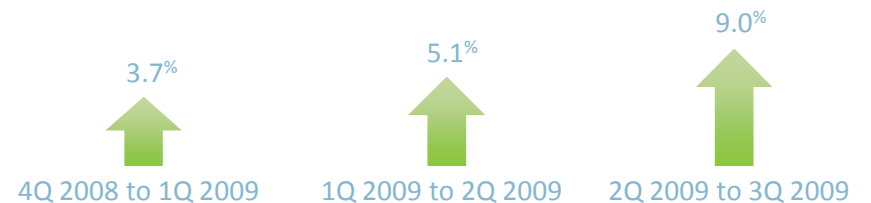
Worldwide Quarter Over Growth: 2009 Growth YTD



Key Insights on Public Wi-Fi Locations Worldwide:

The number of worldwide public Wi-Fi locations has experienced escalating growth quarter over quarter in 2009:

- 18.8% YTD growth in worldwide public Wi-Fi locations



* Q3 2009 growth includes the addition of a network in China previously not registered in the JiWire directory.

Wi-Fi Media Channel: Highlights

Top 10 Countries for Public Wi-Fi: Q3 2009

Q3 Rank	Country	Q3 2009 # of Locations	Q2 Rank	% Change (from Q2)
1	United States	67,837	1	+ 0.6%
2	China	34,931	2	+ 21.8%
3	United Kingdom	27,530	3	+ 0.3%
4	France	25,652	4	+ 0.1%
5	Russian Fed.	14,699	5	+ 1.4%
6	Germany	14,549	6	+ 0.8%
7	South Korea	12,814	7	0.0%
8	Japan	11,604	8	- 0.1%
9	Sweden	6,893	9	+ 3.4%
10	Taiwan	5,444	10	+ 1.1%

Top 10 U.S. Cities for Public Wi-Fi: Q3 2009

Q3 Rank	U.S. Cities	Q3 2009 # of Locations	Q2 Rank	% Change (from Q2)
1	New York City	879	1	- 0.9%
2	San Francisco	873	2	+ 0.1%
3	Chicago	793	3	+ 0.1%
4	Houston	619	▲ 5	+ 0.3%
5	Seattle	611	▼ 4	- 2.2%
6	Los Angeles	506	6	+ 0.2%
7	Atlanta	455	7	+ 0.4%
8	San Diego	443	8	+ 1.1%
9	San Antonio	432	9	+ 0.2%
10	Austin	418	10	+ 0.2%

Key Insights on Public Wi-Fi Locations Worldwide:

There was widespread quarter over quarter growth in public Wi-Fi locations Q3 2009:

- 8 of the Top 10 Countries had an increase in public Wi-Fi locations from Q2 to Q3 2009.
- The Top 10 Countries for public Wi-Fi remained the same in Q3 2009.
- Houston and Seattle exchanged rankings in the Top U.S. Cities between Q2 and Q3 2009.

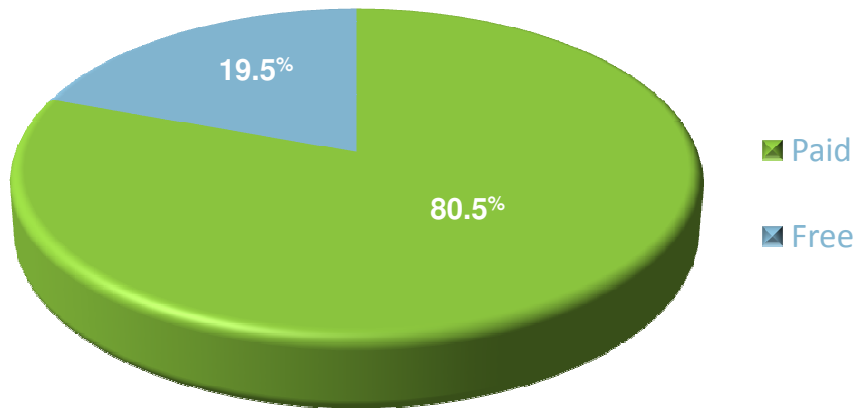
* Q3 2009 growth includes the addition of a network in China previously not registered in the JiWire directory.

Wi-Fi Media Channel: Highlights

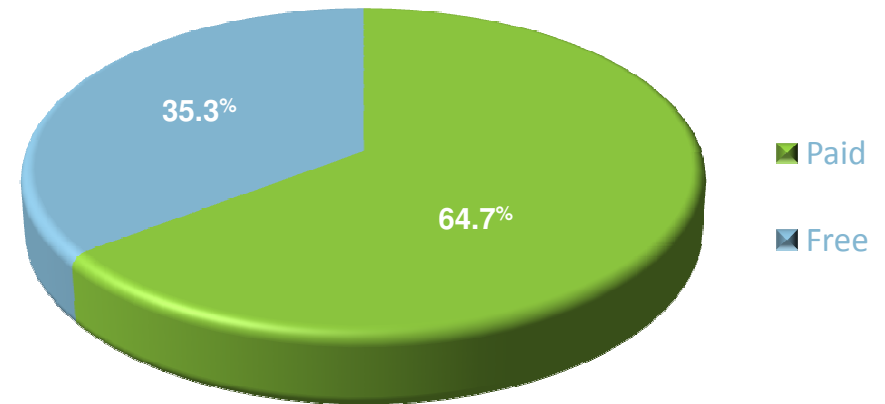
Worldwide Public Wi-Fi Access: Q3 2009

U.S. Public Wi-Fi Access: Q3 2009

Public Wi-Fi Business Models: Worldwide



Public Wi-Fi Business Models: U.S. Only



Key Insights on Public Wi-Fi Access:

The majority of public Wi-Fi locations worldwide and in the U.S. offer paid Wi-Fi Access:

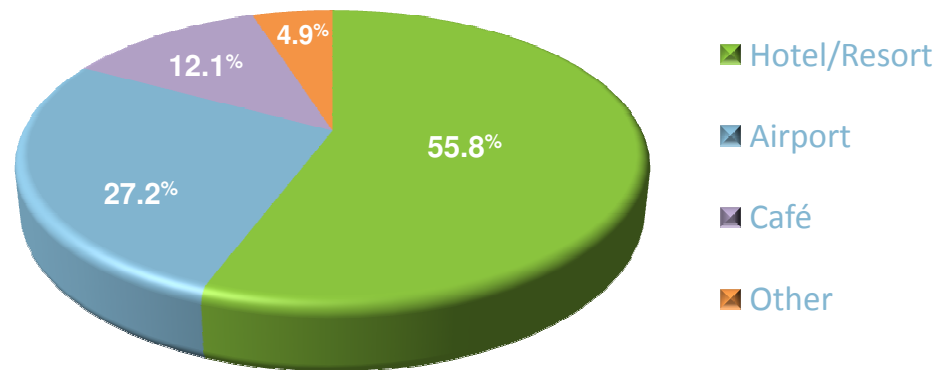
- The percentage of Free public Wi-Fi locations in the U.S. is 81% greater than the percentage of Free public Wi-Fi locations Worldwide.
 - 43.0% of the Free public Wi-Fi locations in the U.S. are café/restaurant/bar locations; Free Wi-Fi can be offered as an amenity to attract customers.
 - Top U.S. venues offering Paid public Wi-Fi serve business and leisure travelers, including: Airports, Travel Centers, RV Resorts, Campgrounds, Convention Centers, Hotels and Business Centers.

Wi-Fi Media Channel: Highlights

North American Public Wi-Fi Unique Users: Q3 2009

North American Public Wi-Fi Unique Users: Q3 2009

Most Public Wi-Fi Users are at Hotel/Resort Locations
(% Unique Users by Venue Type)



Venue	Q2 2009 Market Share	Q3 2009 Market Share	% Change in Market Share
Hotels	59.2%	55.8%	- 3.4%
Airports	21.7%	27.2%	+ 5.5%
Cafes	10.5%	12.1%	+ 1.6%
Other	8.6%	4.9%	- 3.7%
All Venues	100%	100%	-

Key Insights on North American Public Wi-Fi Users:

Public Wi-Fi growth trends in Q3 2009:

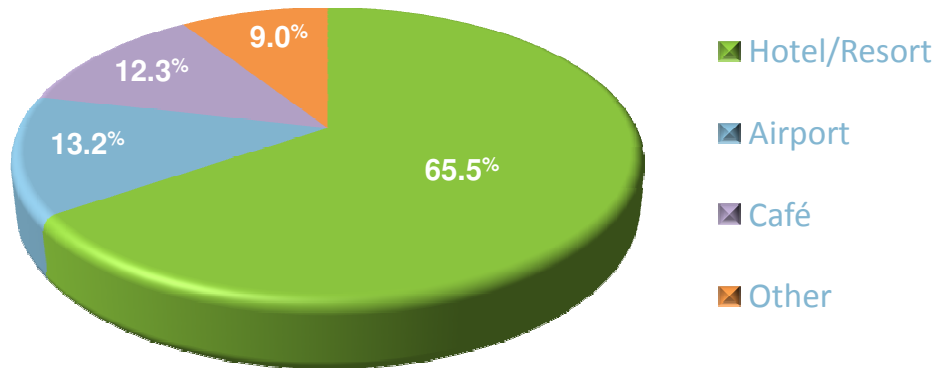
- The summer travel season contributed to growth in airport Wi-Fi usage.
- Café locations continue to see growth as customers use their local café as a gathering place and home office.

Wi-Fi Media Channel: Highlights

North American Public Wi-Fi Visits: Q3 2009

North American Public Wi-Fi Visits: Q3 2009

Most Public Wi-Fi Visits are at Hotel/Resort Locations
(% Visits by Venue Type)



Venue	% Change in Total Visits (Q2 to Q3 2009)	% Change in Avg. Visits Per Venue (Q2 to Q3 2009)
Hotels	+ 9.4%	+ 4.0%
Airports	+ 23.2%	+ 12.7%
Cafes	+ 12.0%	+ 12.0%
Other	+ 9.8%	+ 4.3%
All Venues	+ 11.4%	+ 12.2%

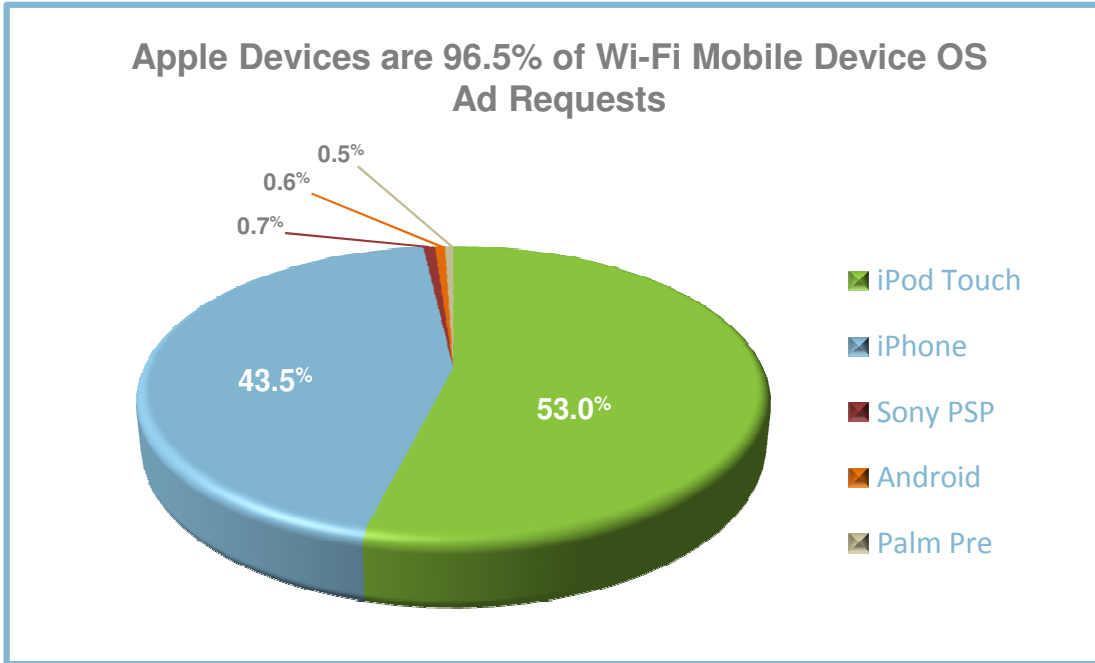
Key Insights on North American Public Wi-Fi Visits:

There was an overall 11.4% growth in total visits at public Wi-Fi locations:

- There was widespread quarter over quarter growth in total visits across all major venue types.
- We've included an analysis of visits by venue type as a new section in the Q3 2009 report. Changes in both total visits as well as average visits per venue are provided, which provides a more accurate view of quarter over quarter growth as new locations are added.

Wi-Fi Media Channel: Highlights

North American Top 5 Mobile Device OS Ad Requests: Q3 2009



North American Top Mobile Device OS: Q3 2009

Q3 Rank	Mobile Device OS	Q3 2009 % of Ad Requests
1	iPod Touch	53.0%
2	iPhone	43.5%
3	Sony PSP	0.7%
4	Android	0.6%
5	WebOS (Palm Pre)	0.5%
6	RIM	0.5%
7	Nokia Series 60	0.4%
8	Windows CE	0.4%
9	Nokia Tablet (Linux)	0.3%
10	Other	0.2%

Key Insights on Mobile Device OS on Public Wi-Fi:

In Q3 2009 , we saw a 75.1% quarter over quarter increase in mobile device ad requests on public Wi-Fi locations.

Mobile device OS trends:

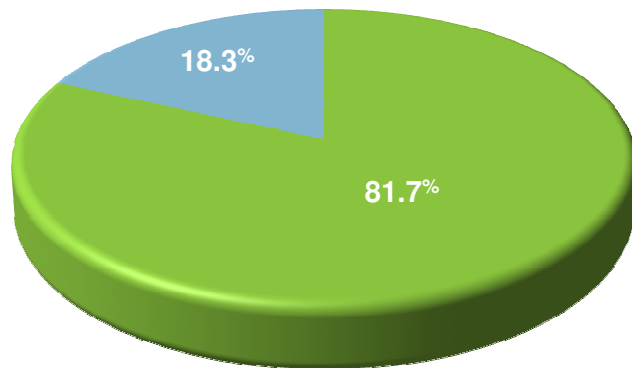
- While the iPod Touch and iPhone have a commanding lead, when combined their quarter over quarter market share is down 1.3%.
 - However, iPhone actually increased quarter over quarter from 41.7% to 43.5% market share.
 - We have separated the iPhone and iPod Touch devices out in the OS list as they each hold a significant market share.
- When grouped by OS, Android devices have emerged as the #4 mobile device OS.
- Palm Pre maintained its position at #5 with a quarter over quarter increase from 0.4% to 0.5% market share.

* OS: Operating System.

Wi-Fi Media Channel: Highlights

U.S. Laptop Ad Requests: Q3 2009

18.3% of Wi-Fi Laptop Users are Mac Users



■ PC ■ Mac

Key Insights on U.S. Devices:

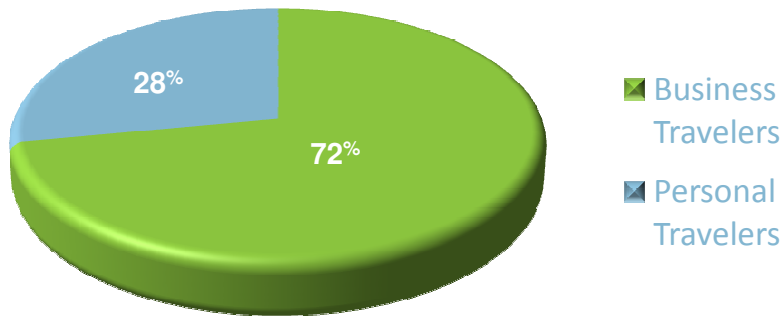
U.S. Wi-Fi Audience is 2.5X More Likely to Use a Mac than the U.S. Market

- 18.3% of the audience across all venues on a laptop in Q3 used a Mac; in comparison, Apple has 7.4% of the U.S. market share for laptops (Source: U.S. PC Vendor Unit Shipment Estimates for 1Q09, Gartner, April 2009).
- Mac laptops gained 3.9% market share from Q2 to Q3 2009, increasing from 14.4% to 18.3% of laptop ad requests.

Wi-Fi Media Channel: Airport Audience Spotlight

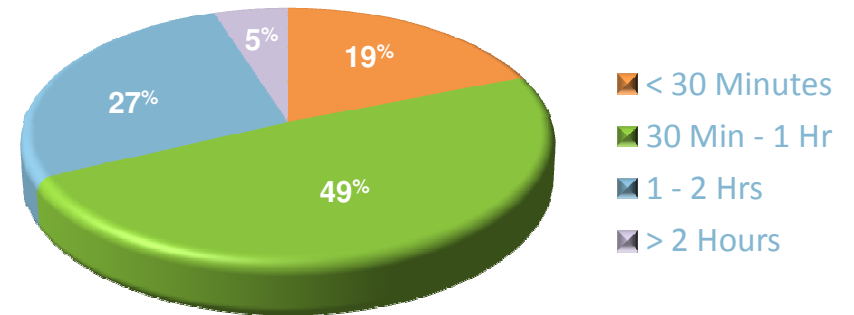
U.S. Airport Audience Profile: Q3 2009

Airport Wi-Fi Usage By Type of Travel



U.S. Airport Audience Dwell Times: Q3 2009

81% of Airport Wi-Fi Audience has a Dwell Time Over 30 Minutes



Key Insights on U.S. Airport Audience Activities Online:

Top Activities On Airport Wi-Fi:

Business Travelers:

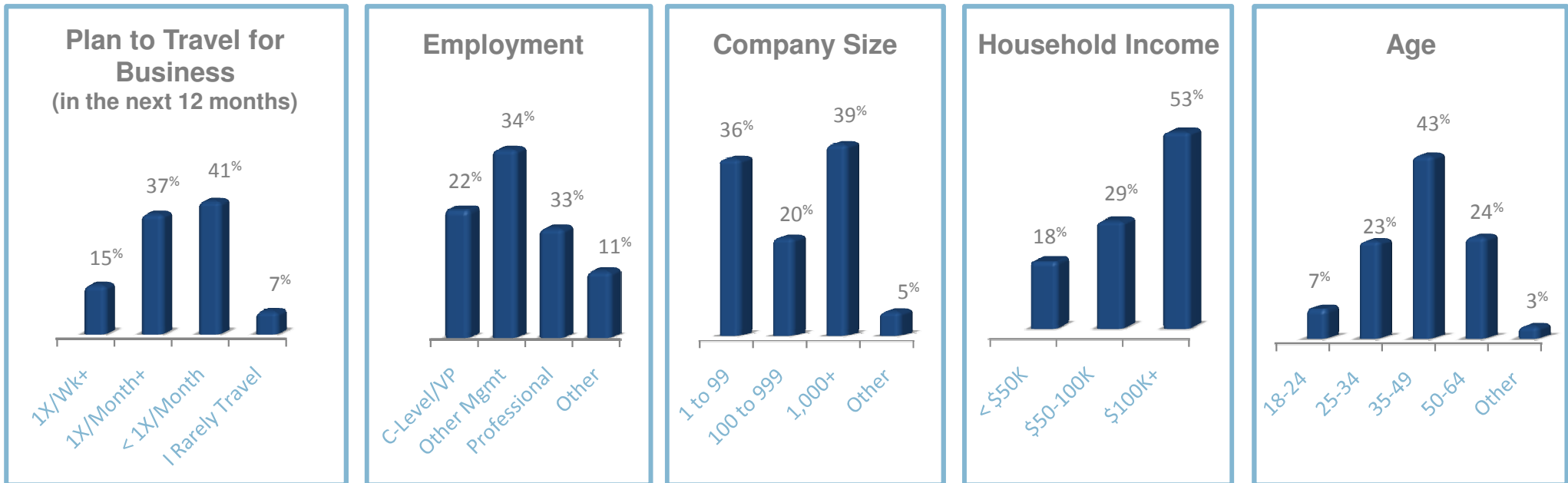
- 94% business-related email.
- 68% personal email.
- 35% look for local information.
- 26% visit social networking sites.
- 3% online gaming.

Personal Travelers:

- 86% personal email.
- 51% visit social networking sites.
- 36% look for local information.
- 36% business-related email.
- 13% online gaming.

Wi-Fi Media Channel: Airport Audience Spotlight

U.S. Airport Business Traveler Demographics: September 2009



Key Insights on U.S. Airport Business Travelers:

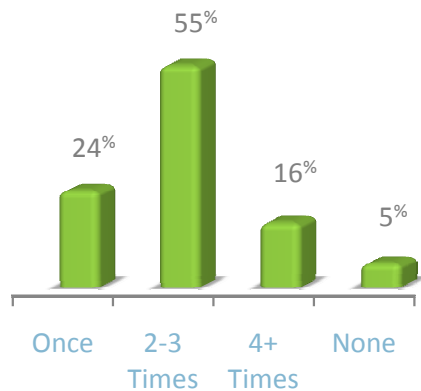
Business travelers tend to be affluent, management, travel frequently:

- 52% of business travelers travel for business at least once a month.
- 56% of business travelers have management titles.
- 56% of business travelers are in small to midsized companies.
- 67% of business travelers connecting are ages 35-64.
- 73% of business travelers connecting are male.

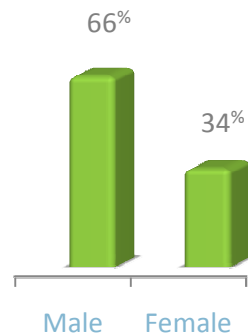
Wi-Fi Media Channel: Airport Audience Spotlight

U.S. Airport Personal Traveler Demographics: September 2009

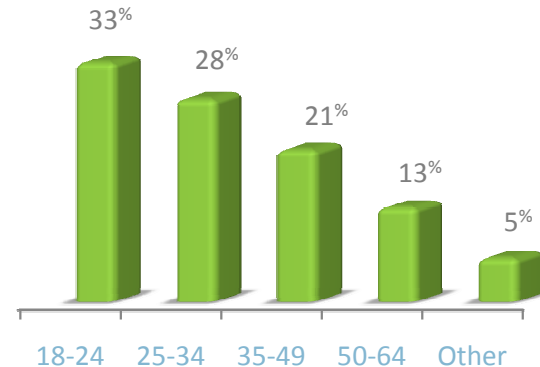
Plan to Travel for Personal Reasons (in the next 12 months)



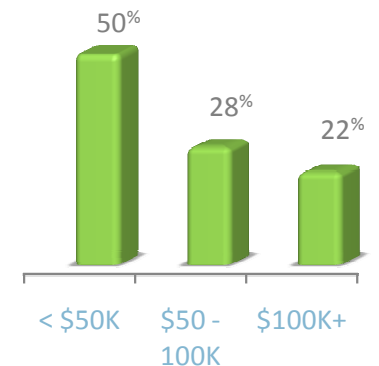
Gender



Age



Household Income



Key Insights on U.S. Airport Personal Travelers:

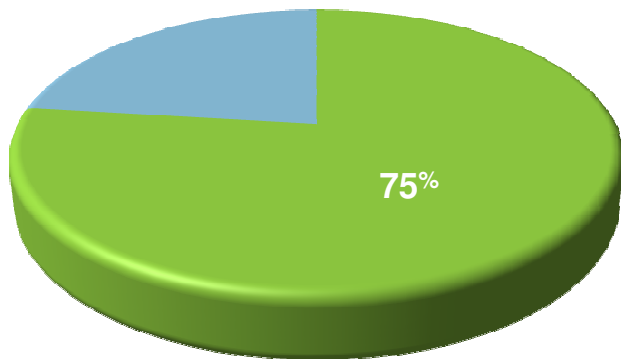
Personal travelers tend to travel frequently:

- 71% of personal travelers plan to travel for personal reasons at least twice in the next 12 months.
- 49% of personal travelers are ages 25-49.
- 50% of personal travelers have a HHI > \$50K.

Wi-Fi Media Channel: Airport Audience Spotlight

U.S. Airport Audience Purchasing Profile: September 2009

**75% of Airport Audience
Plan to Make a Big Ticket Purchase**



U.S. Airport Audience Purchasing Plans:

Rank	Top 10 Purchase Plans
1	Smartphone
2	Vehicle
3	Stocks/Mutual Funds
4	Laptop
5	Flat Panel TV
6	Home
7	Home Entertainment System
8	Luxury Goods: Jewelry/Watches
9	Vacation Property
10	Boat

Key Insights on U.S. Airport Audience Purchasing Plans:

Business and personal travelers have similar purchase intent:

- 75% of airport Wi-Fi customers plan to make a big ticket purchase in the next 12 months.
- High tech purchases are top of mind for business and personal travelers, accounting for 4 out of the top 10: smartphones, laptops, high-end TVs and home entertainment systems.

INSIGHTS

JiWire Mobile Audience Insights Report July-September 2009

For questions about this report, or for recommendations for future reports,
please contact us at Insights@jiwire.com.

Methodology:

JiWire's second Mobile Audience Insights Report is based on data from approximately 280,000 public Wi-Fi locations, as well as surveying 2,644 customers randomly selected in over 80 airport locations across the US that used JiWire's Wi-Fi Media Channel in June-July 2009. JiWire serves advertisements to over 30,000 public Wi-Fi locations in North America and we record data from every ad request. This report is based on the ad request data we collected from July-September 2009. Quarterly public Wi-Fi location rankings and business model distributions are based on the final day of the quarter.

