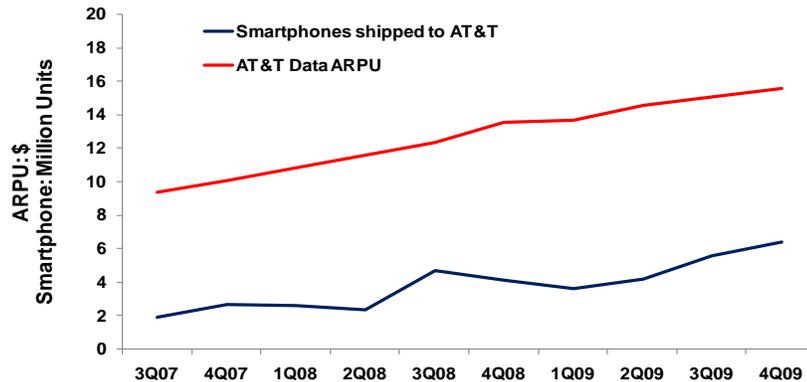


**Synopsis**

This report analyzes the trends in the mobile data market from both consumer and mobile service provider perspectives. It examines operators' retail and wholesale mobile data offerings, their managed service capabilities, the roadmap for mobile value-added services, and competition/collaboration with over-the-top mobile content and application developers and distributors.

**Smartphone Drives Mobile Data Growth**

**Smartphone Sales Drive Data ARPU Growth for AT&T  
(Smartphone shipments to AT&T and Data ARPU Growth)**



Source: Company Financials and Parks Associates Estimates

**Publish Date:** 1Q 11

“Data services are a future revenue driver for mobile operators, but mobile broadband creates a new set of challenges for them,” said Harry Wang, Director of Mobile and Health Research, Parks Associates. “Consumer desire for richer mobile experiences and the market demand for services and applications built on open access could undermine their walled-garden business model. Operators will have to adapt their business models to sell more value-added data applications on top of access services. The key question is what types of mobile data applications will have a broad appeal and help operators differentiate from many would-be mobile service offerings from third-party aggregators and distributors.”

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