

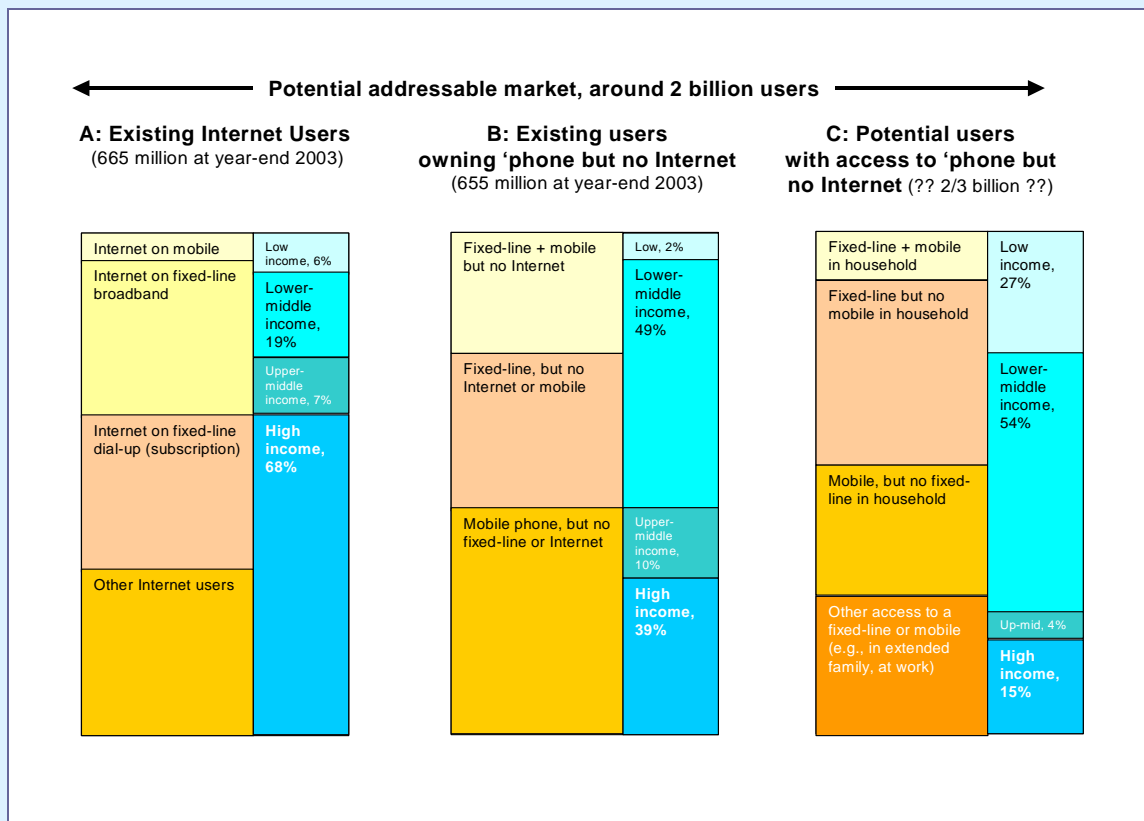
Identifying the market opportunity for the portable Internet

The potential worldwide market opportunity for portable Internet technologies, over the next ten years or so, might be segmented into three blocks of potential users, each composed of around two-thirds of a billion people, making two billion in total (see Figure 3.2):

- A) The first block is composed of **existing Internet users**, of which there were around 665 million at the end of 2003. This category can be further segmented into those that access the Internet primarily from their mobile phone, those who access it from a fixed-broadband connection, subscribers who access it from a dial-up connection, and other casual Internet users that may have access to the Internet, for instance, from their school, from a cyber-café, from work etc.
- B) The second block is composed of existing **owners of either a fixed-line telephone or a mobile phone** (or both) but not an Internet connection. There are almost twice as many mobile phones worldwide as Internet users, so it can be assumed that the *minimum* number of users in this category is at least 655 million (global mobile phone users minus global Internet users), though it is almost certainly higher as some of the Internet users included in category A) probably do not own a fixed-line phone or mobile (e.g., students who access the Internet from school or university).

Figure 3.2: Estimating the potential market for the portable Internet

Broken down by type of usage category and by income category of country in which the potential portable Internet user lives



Note: Values are indicative and estimated rather than accurate. There is no particular correspondence intended between the categories shown on the left of each block and the breakdown by income category, shown on the right.

There may be some double-counting of individuals, for instance, those that have Internet connections at work (or school) and at home. Income categories refer to the citizens of countries ranked by their World Bank-defined income status (see *Data Notes*).

Source: ITU.