

Cosmote Calling Tunes

Leveraging Ringback Tones Success Content Best Practice

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COSMOTE footprint

COSMOTE Greece

Number of Subscribers¹:
4.750.000

COSMOFON

Number of Subscribers¹:
414.000

AMC

Number of Subscribers¹:
828.000



COSMOTE Romania

Number of Subscribers¹:
275.500

GloBul

Number of Subscribers¹:
2.561.000

Notes:
1. 1st Q 20056 results

- Total addressable population ~ 45.6 m
- 1st Q 2006 customer base ~ 8.8 m

Cosmote Music Services

Voice Music Portal

Beat Box 1414 includes:

- Calling Tunes (Ring Back tones)
- Song Dedications
- Song Listening
- Ring tones

COSMOTView /WAP/ SMS /SIM menu

- True tones
- Ring tones
- Music Video Clips
- Music Wallpapers
- Music News
- Music Alerts
- IFPI Top10
- Artists' Voice messages
- Music Quiz
- Information for Music Events



COSMOTView

What is Calling Tunes

- **Calling Tunes is Cosmote's commercial name for Ring Back Tones on the Comverse Fundial Platform**
- **With Calling Tunes Cosmote subscribers can replace the standard ringing tone with music, jokes, or sound bites that callers can hear while waiting to be answered.**
- **The service is:**
 - ✓ **Powerful way to Personalize your phone**
 - ✓ **Unique**
 - ✓ **Innovative**
 - ✓ **Funny**

Calling Tunes

Competitive Landscape

- On January 2005 Cosmote introduced for the first time in the Greek Market a service for personalizing standard ring-back tone.
- Main objective was to offer our subscribers a new powerful and cost-effective way for personalizing their phone.
- Main competitive services are Ring Tones (Polyphonic and Real Tones) which offer a less degree of personalization at a greater cost.
- Competition introduced ring back tones services during 2006

Calling Tunes Market Segments

- Main focus was given primarily to youth segment (15-25) that enjoy using Value Added Services.
- Secondary focus was given in attracting the 25-35 segment that want to personalize their phone.
- With the right content and the proper campaign Ring Back tones can attract all the different age groups

Calling Tunes

Key factors of success

Pricing

- **Our main effort is to offer value for money.**
 - ✓ No monthly fee
 - ✓ No Expiration of songs
 - ✓ Promotion Campaign offering a Calling Tune at the price of 1€ and then price increased at 1,5€
 - ✓ Initial IVR charging of 0,3€/min for accessing the service through the menu and then price increased at 0,5€/min.
 - ✓ Price Increase did not affect usage

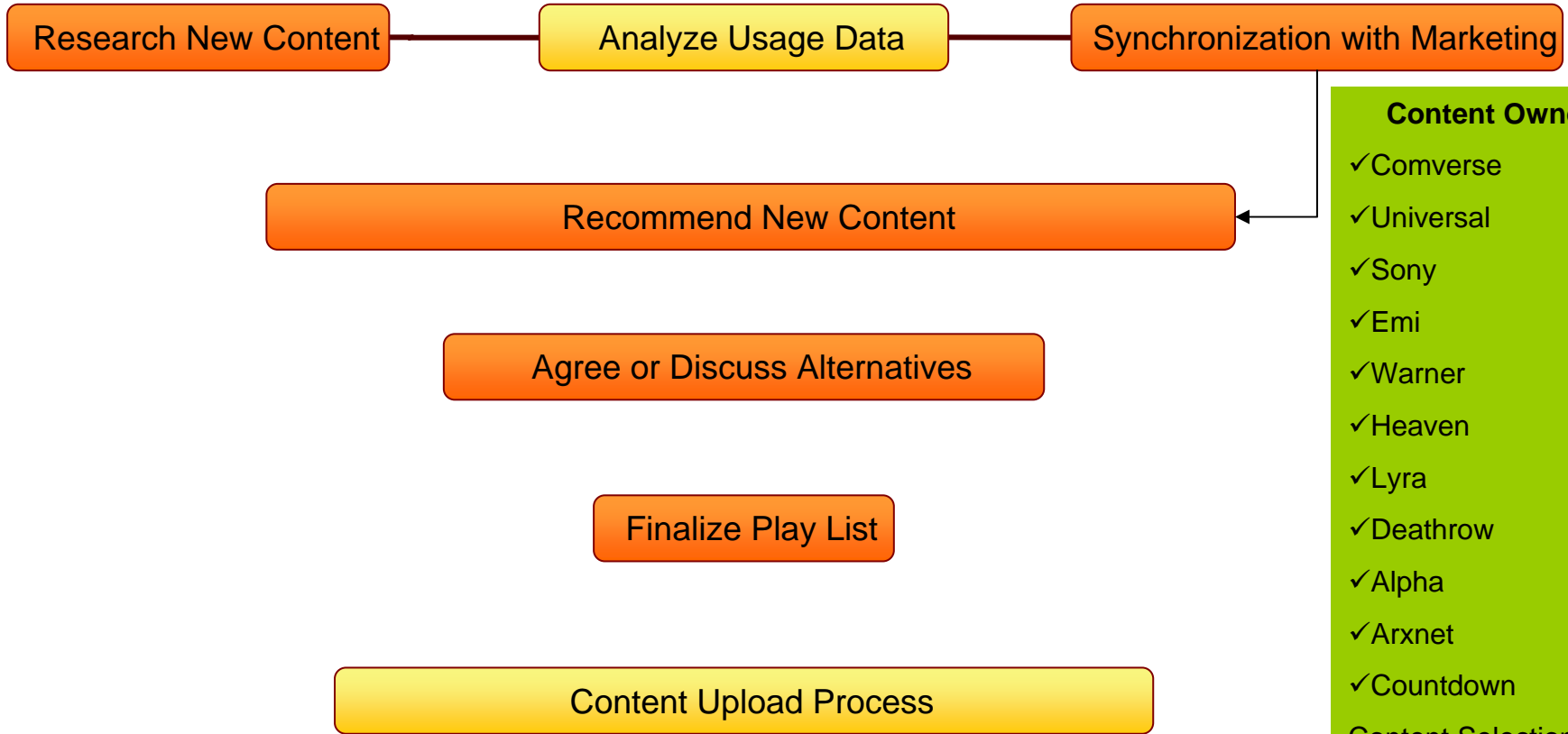
Calling Tunes

Key factors of success

Quality of Content

- **Getting The Right Content to the right People at the right Time**
 - ✓ Careful selection of content to appeal directly to the targeted segments
 - ✓ Content related to major events (Euro 04-Eurovision-Mundial-Mundobasket) and special dates (Sent Valentines)
- **The Right Content Mix**
 - ✓ Great Variety of content: 14 Categories with more than 200 selections
 - ✓ Local V's International, Evergreen's V's Latest Hits
 - ✓ Major V's Independents, Originals V's Covers
 - ✓ Music V's Non Music
 - ✓ Content Exclusivities
 - ✓ All major International & Local record labels available
- **Continuous Updates of Content (Monthly Updates)**

Calling Tunes-Key factors of success



Content Owners

- ✓ Comverse
- ✓ Universal
- ✓ Sony
- ✓ Emi
- ✓ Warner
- ✓ Heaven
- ✓ Lyra
- ✓ Deathrow
- ✓ Alpha
- ✓ Arxnet
- ✓ Countdown

Content Selection by Buongiorno

Calling Tunes

Key factors of success

Different options for greater personalization

- **Give the tools to make user's phone unique**
 - ✓ Ability to set a Calling Tune as default to all users
 - ✓ Ability to select different Calling Tune per user
 - ✓ Ability to select different Calling Tune per time of day (Morning-Afternoon-Evening)
 - ✓ Ability to select different Calling Tune per user & per time of day (Morning-Afternoon-Evening)

Calling Tunes

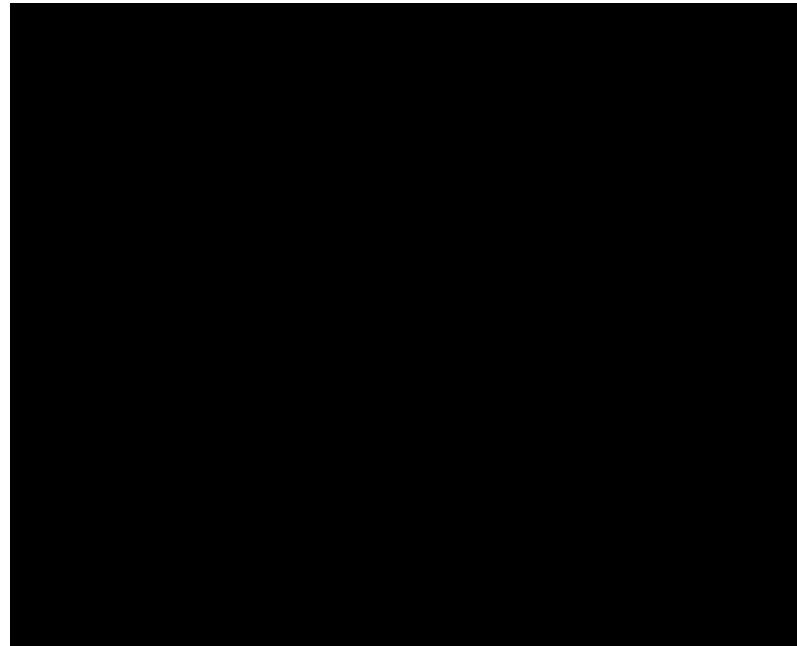
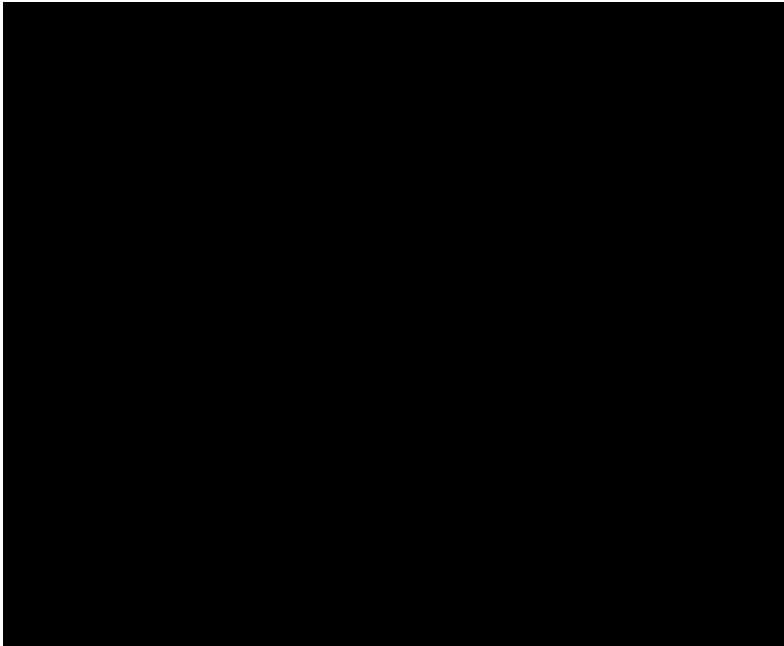
Commercial Overview

Strategy & execution

- ✓ **Speed of Market Education**
- ✓ **Effective and Clear Marketing Campaign with Call to Action**
 - TV & Radio scripts were designed with a main objective to attract young segment of the market by focusing on the fun aspects of the service.
 - TV & Radio Campaign from Mid January to End of February 05
 - TV & Radio Campaign March 06-Eurovision Contest

Calling Tunes Commercial Overview

TV Commercials



Calling Tunes

Commercial Overview

Strategy & execution

✓ **Content Exclusivities**

- Secure Exclusive content available only at Calling Tunes service-Inform current and prospective users through Promotional SMS (Ie. Exclusive content for Sent Valentines)

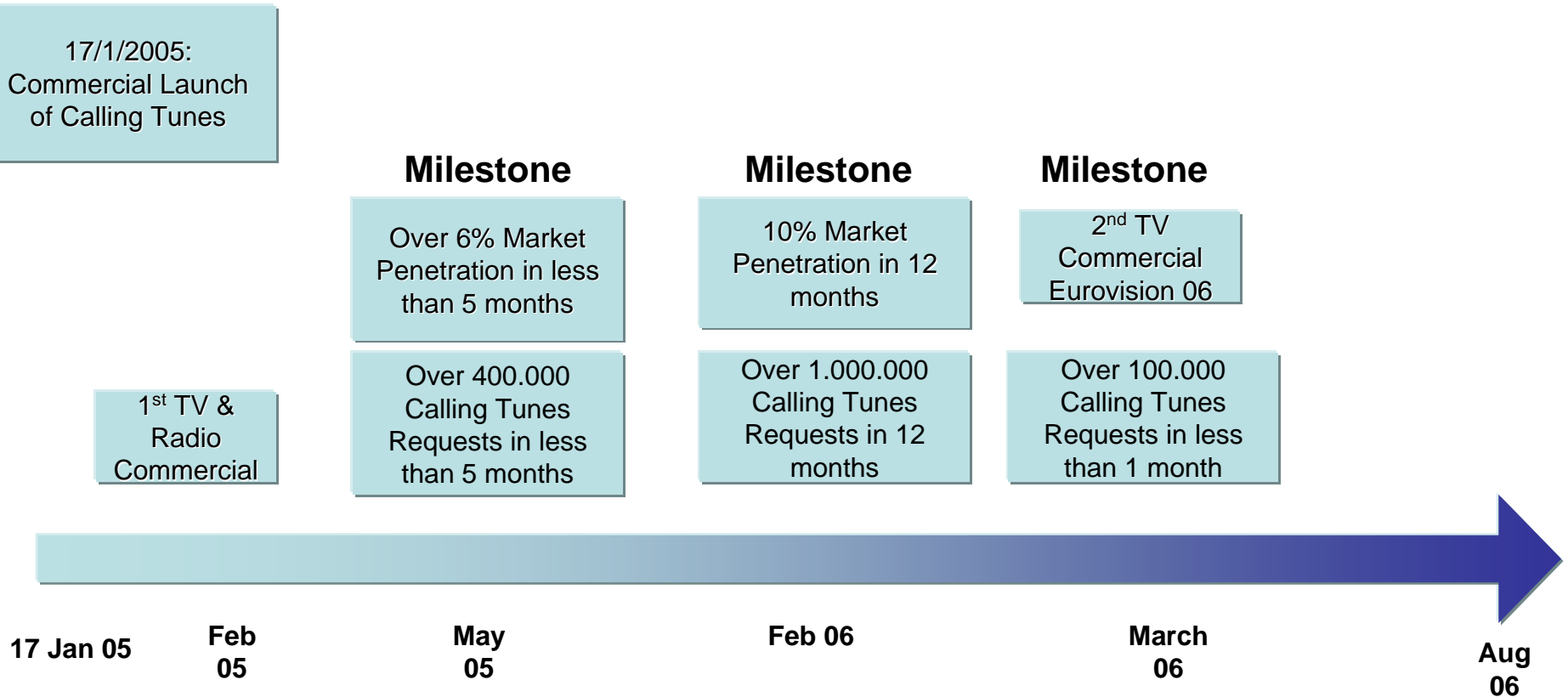
✓ **Direct marketing activities**

- Promotional SMS with information on new songs added to the service. Promotional SMS targeted to current users of Calling Tunes and users of other Value added services with resemblance to Calling Tunes (ex. Ring tones)

✓ **Marketing programs**

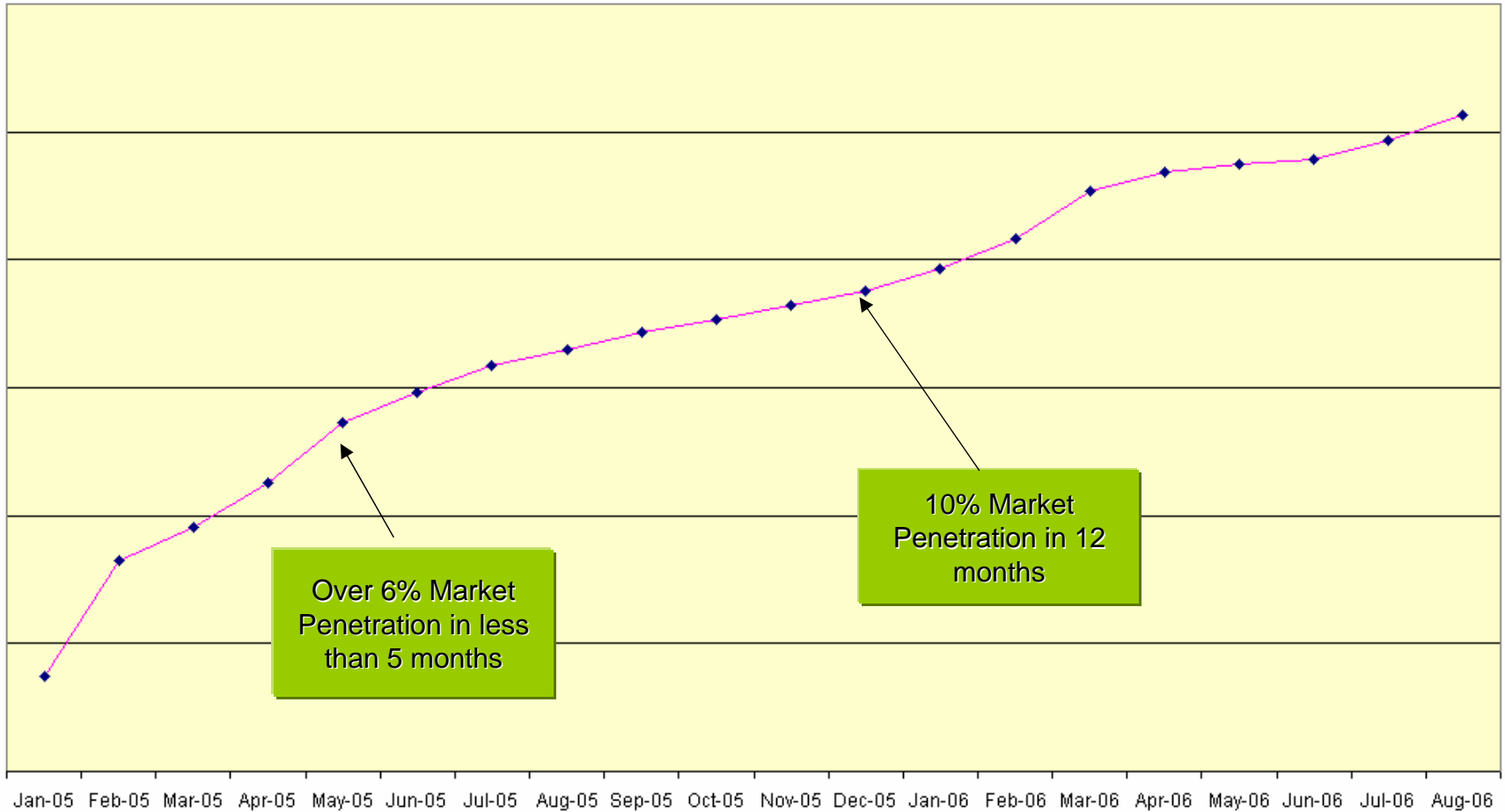
- Sponsorship of famous radio shows where speakers were talking about Calling Tunes
- Informative Leaflets within statements
- Promotional leaflets at events (ex. Theatrical show CATS)

Calling Tunes Highlights



Calling Tunes-Highlights

Calling Tunes Total users



Calling Tunes-Future Enhancements

- ✓ **Make even simpler ordering process**
- ✓ **Emphasis into Content-Strong cooperation with record labels**
- ✓ **Market Research and evaluation of future features that will bring higher value to the service**

Calling Tunes

Leveraging Ringback Tones Success

Summary

Key Success Factors

- ✓ **Effective Market Segmentation**
- ✓ **Pricing Policy-(Offer High Value for money)**
- ✓ **GET THE RIGHT CONTENT TO THE RIGHT PEOPLE AT THE RIGHT TIME**
- ✓ **Personalization (Offer options to personalize the service further)**
- ✓ **Effective Communication Strategy-(Clear Marketing campaign with call to action)**

Thank You