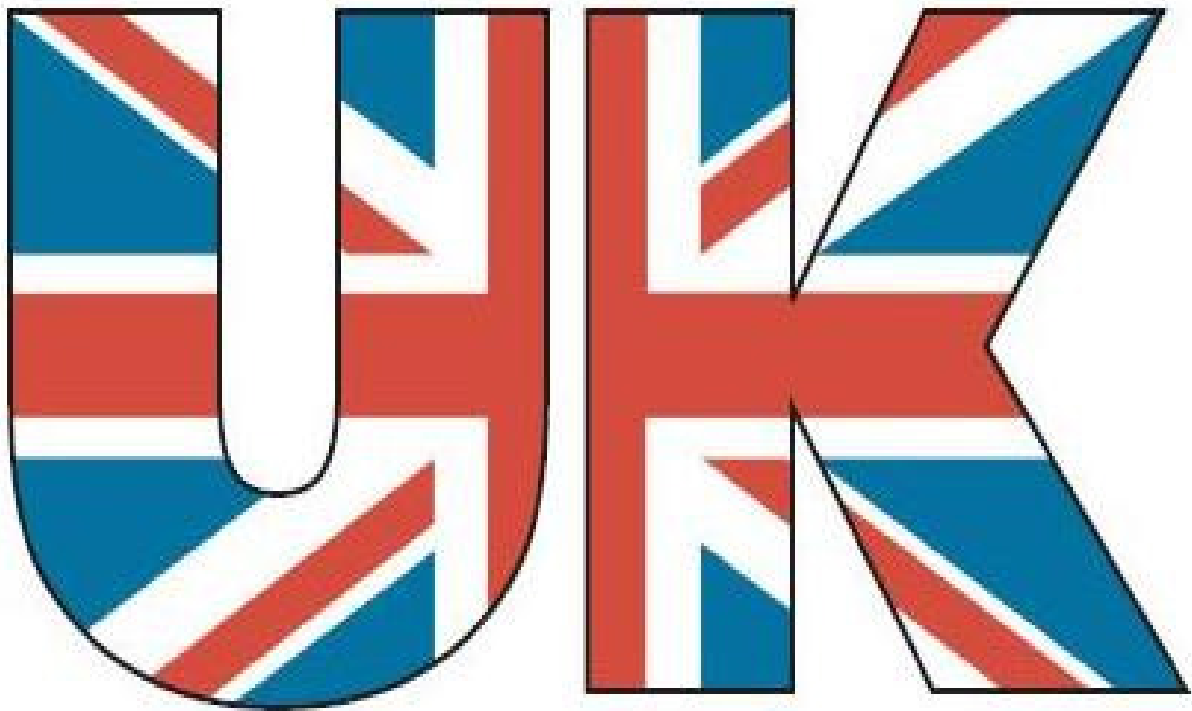


MOBILE advertising

RESEARCH



FACTS AND VISIONS ON AND BY THE MARKET

WHY MOBILE ADVERTISING RESEARCH UK 2009?

Mobile advertising has been identified for years as a promising market, with huge potential. Some experts indicate mobile advertising has more potential than internet advertising, which in some markets has over 20% market share in the entire advertising industry.

Mobile Advertising Research UK 2009: 'Facts and visions on and by the market' is the result of market research which was conducted in the UK in 2009.

Endorsed by the Interactive Advertising Bureau Europe (**IAB Europe**), the Internet Advertising Bureau UK (**IAB UK**) and the Mobile Marketing Association (**MMA**), this report has had the aim to document to state of the mobile advertising market in the UK, to identify key opportunities, challenges and the road ahead.

This report has as key feature that it is has focused on a **national**, not a global market. The content of the report reflects a combination of **qualitative** as well as **quantitative** insights. UK players in the **entire value chain** have provided their views and insights: brands, media agencies, operators, infrastructure suppliers, application- and ad serving companies, as well as branch organizations and consultancies. Just as significant, or even more important, have been the views of **individuals**, or as some would say in the traditional media-world: consumers.

Interviews with market experts, a **survey** with 1000+ individuals, **presentations by experts during seminars** and **research on existing materials**, have been the cornerstones for the results. This report does not claim to hold 'the mobile advertising truth'. Where you stand, depends very much on where you sit. Experts have different views of the world, which underscores one of the report's conclusions: **industry collaboration is key to success, not competition**. Trying to bring the various, sometimes opposing views together, is one of the key objectives of this project.

Mobile Advertising Research UK has been the result of the collaborative efforts of Every Single One Of Us, MSearchGroove and Aeneas Strategy Consulting & Management. Key results have been presented during Mobile Advertising UK, in London June 15, organized by CamerJam Events. The partners in this project share as a passion to enrich the media industry with mobile as a valuable addition to the media-mix. This is done through collaborating on research, organizing and speaking at events, hosting workshops, providing consultancy and bringing players together.

This research intends to be repeated **annually**, in order to **track progress and development** qualitatively and quantitatively. Mobile Advertising Research UK is part of a **global program**, initiated by Aeneas Strategy Consulting & Management, where national research takes place in a number of countries including the United States, Germany and The Netherlands. In all of these countries, the views of **national** players in the value chain as well as individuals are the crucial starting points for market developments and findings. All research is conducted in collaboration with local partners.

We would like to thank MMA, IAB UK and IAB Europe for their cooperation and shared view of developing mobile as a cost-effective way for brands to communicate with individuals. We sincerely appreciate the input by Comscore, Research Now and Wasabi Mobile. Without the valuable input from numerous respondents and individual citizens, this research would merely be desk research from the ivory tower. Last, but definitely not least thanks to CamerJam for unrelentless efforts in making Mobile Advertising UK 2009 happen.

London, July 8, 2009

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ABOUT US

ÆNEAS STRATEGY

Headquartered in The Hague, ÆNEAS STRATEGY is an international consultancy firm focussed at strategy & business development for the telecommunications market and global mobile industry. The firm has spearheaded the development of innovative mobile advertising strategies on behalf of players in the emerging business ecosystem active in the international arena. It was founded in 2004 by Tarik Fawzi, whose career in the advertising and mobile industries spans 15 years.

Every Single One Of Us

Is a communications movement with a vision to enable and enhance interaction between people and commerce. The collaborative venture - founded by Jonathan MacDonald, was created to safeguard user experience in the ultra-connected world. Global objectives include market research, seminars, consultancy, workshops, master-classes, and platform development. By promoting and authorising best practice, Every Single One Of Us intends to provide a central access point for positive and progressive communication activities focussed on citizen engagement.

MSEARCHGROOVE

Provides analysis and commentary on mobile search, mobile advertising and social media. Through primary research and interviews with c-level executives and industry luminaries, MSG is the essential read for companies seeking ways to monetise their digital assets, drive mobile advertising revenues and harness the power of empowered consumers. MSG is owned by Peggy Anne Salz, who has established a successful consulting career.

This report was made possible with the contribution and endorsement of:



Mobile Marketing Association
<http://www.mmaglobal.com>

The Mobile Marketing Association (MMA) is the premier global non-profit trade association established to lead the growth of mobile marketing and its associated technologies. The MMA is an action-oriented organization designed to clear obstacles to market development, establish mobile media guidelines and best practices for sustainable growth, and evangelize the use of the mobile channel. The more than 700 member companies, representing over forty countries around the globe, include all members of the mobile media ecosystem. The Mobile Marketing Association's global headquarters are located in the United States and it has regional chapters including North America (NA), Europe (EUR), Latin America (LATAM), Middle East & Africa (MEA) and Asia Pacific (APAC) branches.



IAB EUROPE
<http://www.iabeurope.eu>

Representing 23 country members across Europe and over 5000 companies, the Interactive Advertising Bureau (IAB) Europe is the trade association of the European digital and interactive marketing industry. Supported by every major media group, advertiser, agency, portal, technology and service provider, the power of IAB Europe comes from its extensive membership. IAB Europe exists to promote the growth of Europe's interactive advertising markets, to protect the interest of the industry, to regulate practices on the market and to educate the stakeholders in the digital landscape. To achieve these goals, IAB Europe coordinates activities across the region including public affairs, benchmarking, research, setting standards and best practices.



The Internet Advertising Bureau (IAB) is the trade association for digital advertising. With over 480 members, it's run for the leading media owners and agencies in the UK internet industry. Online is an exciting and fast-growing medium and our job at the IAB is to work with members to ensure marketers can identify the best role for online and the emerging mobile market, helping them engage their customers and build their brands. Through the dissemination of research and the organization of regular events, we aim to put digital on the agenda of every marketer in the UK, acting as an authoritative and objective source for all internet advertising issues whilst promoting industry-wide best practice.

This report was made possible with special thanks to the research launch partners:



This report was made possible with the help of and thanks to our executive partners:



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