



Understanding Mobile Marketing Technology & Reach

MAY 2007



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Introduction

Creating and executing a mobile marketing campaign is a process that involves multiple steps. Learning those steps takes time. It is not unusual for marketers new to mobile to start out with very ambitious ideas about the kinds of things they would like to do, only to be discouraged once they begin to have an understanding of the challenges. Not to worry. Finding the right way for your brand to use mobile marketing is an ongoing effort, with the potential for long-term benefits.

Marketers should consider several factors when developing a mobile campaign:

- **Addressable audience.** How many handsets currently in the target market can support the technology (e.g., MMS) or application (e.g., wallpaper) that will be used for the campaign?
- **Case studies.** Have other brands used mobile marketing to reach the target audience? If so, what worked – and didn't? Are there any best practices for this type of campaign?
- **Variables.** What are the technical and creative limitations? Will the campaign have to be customized to meet any unique carrier, handset and network requirements? If so, how does that customization affect the campaign's cost and timetable?
- **Business case.** What is the campaign's projected cost? Is the campaign likely to provide a solid return on investment (RoI)?
- **Partners and enablers.** Which agencies and/or mobile service providers will you need to work with in order to execute the campaign?
- **Timing.** How much time will it take to create and execute the campaign? Does that timeline fit the brand's objectives?

Media Integration

One reason why mobile marketing is so effective is because it provides brands with a way to reach their target demographics throughout the day instead of just when they're at a computer, watching TV or reading a magazine. Another reason is that mobile marketing can leverage other media, such as by including a short code on a billboard so passers-by can get information on the spot.

Those reasons highlight why it's important to consider where and how consumers are likely to be made aware of a mobile campaign. For example, it's helpful to know where the target audience lives, works or plays, as well as what they read and watch. That information can be used to determine whether the mobile campaign can build awareness by leveraging ads in magazines, on a coaster in a bar, on a sign in a subway car or on radio. Recent research from M: Metrics, an independent analyst firm, shows that TV is the leading media for educating and encouraging consumers to use their mobile devices to participate in a mobile marketing campaign.

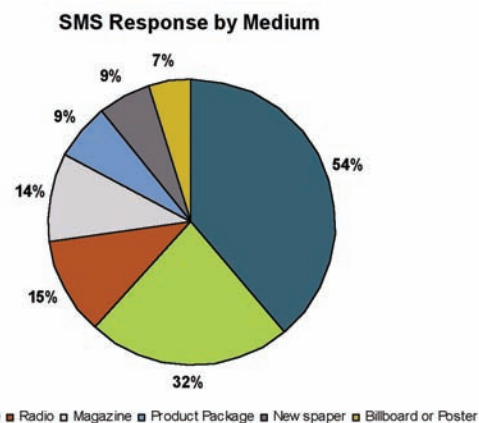


Figure 1 summarizes this research. Source: M:Metrics 2007

First Steps

Your first few mobile marketing campaigns will be learning experiences, but that doesn't mean they can't be successful. (However, their success depends partly on choosing partners that have extensive experience in mobile marketing.) The initial campaigns also are an opportunity to gather valuable insights into how your target audience responds to mobile marketing.

This document is designed to be both a quick reference and a basic guide that can be easily read from beginning to end. It is divided into four sections, each representing mobile media's major technology categories: messaging, WAP and mobile web, streaming media and downloadable content. In each section, you'll learn about what the reach of each medium is, the user demographics and the timelines and costs involved. You'll also discover some of the best practices that have been established by previous campaigns. We'll also look at how those tactics can be integrated with other emerging mobile technologies. Case studies from a wide range of brands are included to illustrate the best usage of mobile technology in each of these categories.

We hope that you'll come away from this document with the kind of understanding that drives inspiration and motivation to take on the challenges of your own mobile marketing endeavors.

Messaging

SMS

Short Message Service (SMS) is the most widely used messaging vehicle for mobile marketing. Also known as “texting,” SMS supports text messages of about 160 characters, depending on the handset and network. (It’s also possible to create longer SMS messages by stringing together multiple 160-character messages.) SMS messages can be sent a variety of ways, including from one handset to another, from a PC to a handset and from a handset to a PC.

SMS is a worldwide phenomenon that began in Europe. In the United States, over 35% of wireless users send at least one text message a month.¹ Worldwide, there are more than twice as many SMS users as there are e-mail users. These statistics are noteworthy because they show that most mobile users are familiar with SMS, so mobile marketing campaigns don’t have to educate them about text messaging.

SMS supports common short codes (CSCs), which are phone numbers – usually four to six digits – to which cell phone owners can send text messages. In return, they receive alerts, information and electronic coupons, and get the opportunity to participate in contests and other interactive marketing initiatives. By making it fast and convenient for mobile users to select and receive information, CSCs greatly increase consumer response to advertising and marketing promotions. CSCs are discussed later in this primer.

MMS

Multimedia Messaging Service (MMS) is similar to SMS, except that it primarily supports graphics, photos, audio and video. As a result, MMS provides mobile marketers with additional tools, such as the ability to offer wallpaper that promotes a brand or product. For example, a music fan can send an SMS message to a short code in order receive an MMS with a video clip of her favorite artist.

MMS leverages the growing installed base of camera phones. Cameras now are common even on low-cost, entry-level handsets, making MMS a viable way to reach nearly all demographics. Mobile marketers can use MMS and camera phones for “viral” campaigns and other tactics that rely on user-generated content.

Messaging Benefits

SMS and MMS benefit marketers in a variety of ways by:

- Extending marketing communications beyond traditional media
- Complementing traditional media in order to increase awareness
- Allowing companies to target specific audiences
- Encouraging audiences to take action as soon as they see an ad, rather than waiting until later, such as when they’re at a PC

¹For additional statistics, see www.moneyweb.co.za/shares/ict_sector/872873.htm.

- Providing immediate, granular information about response to a marketing campaign
- Allowing marketers to reach audiences wherever they are, even when they’re mobile
- Providing opportunities to generate revenue every time users interact with messaging

Reach

The messaging sector has seen incredible growth over the past few years. In 2005, SMS generated over \$3 billion for U.S. wireless carriers. In June 2006, U.S. carriers handled approximately 8 billion text messages, according to CTIA – The Wireless Association. One reason for this growth is because nearly 100% of U.S. handsets currently in use support SMS. That installed base makes Since text messaging is a service already being used by a large base of consumers to communicate (and because almost all mobile devices support text capability), SMS is a powerful way to interact with US wireless customers.

The size of a carrier’s customer base is one factor that marketers should consider when planning a campaign. In the United States, for example, the four largest are Cingular Wireless, Sprint Nextel, Verizon Wireless and T-Mobile USA, followed by dozens of smaller, often regional carriers. The table below summarizes their market shares and customer bases.

	Cellular Phone Subscribers	Market Share ²
Tier 1 Carrier		
Cingular Wireless	61 M ³	26.2%
Verizon Wireless	59.1 M ⁴	25.3%
Sprint Nextel Corp.	53.1 M ⁵	22.8%
T-Mobile USA Inc.	25 M ⁶	10.7%
Leading Tier 2 carrier		
Alltel	11 M ⁷	4.7%
TOTAL	209.2 M	89.7%

²www.ctia.org
(based on a subscription base of 233M subscribers)

³Source: www.cingular.com

⁴Source: www.verizonwireless.com

⁵Source: www.sprint.com

⁶Source: www.tmobileusa.com

⁷Source: www.alltel.com

Demographics

SMS usage varies by age. Table 2 summarizes the break-down, which is an important factor in campaigns that target specific age groups.

Table 2: Mobile Phone Features Used by US Mobile Phone Owners by Age March 2006 (% of respondents)

	18-29	30-49	50-64	65+
Text Messaging	65%	37%	13%	8%

Source: www.emarketer.com

Short Code Development Time and Cost

The entire process of obtaining a CSC – from the initial steps of submitting the short code program to commercial launch – typically takes six to eight weeks. One way to avoid delays is to work closely with an agency and/or aggregator throughout the entire process.

Depending on your aggregator, costs include:

- The short code itself, which requires a minimum three-month commitment:
 - \$500 for a random number
 - \$1,000 for a vanity CSC e.g., PIZZA/74992
- One-time carrier setup, which ranges from \$1,000 to \$2,000
- Aggregator fees, which range from \$1,000 to \$2,000 per month

The price per SMS message varies, depending on the monthly volume of messages. It typically ranges from 2.5¢ to 5.5¢ per message.

Next Steps

Table 3 provides high-level instructions for developing and executing a mobile marketing campaign that uses CSCs. For additional information about CSC-based Campaign, see the MMA’s Short Code Primer, which is available for free at www.mmaglobal.com/shortcodeprimer.pdf.

Table 3: Steps to Execute a Mobile Marketing Campaign

Step	Action	Timeline
1	Evaluate your overall messaging usage and objective. This should be planned with the input of an agency, mobile ASP and/or aggregator. They will help navigate the legal issues around promotions and identify any challenges related to different carrier requirements.	ASAP
2	Obtain CSC from the U.S. short code registry	1-3 days
3	Your agency and or mobile ASP and/or aggregator will submit the short code application, along with the short code, to the wireless carriers for approval and provisioning	1st – 6th week
4	The carriers will then approve and provision your service. At this point, your agency and or mobile ASP and/or aggregator will work with you to test your application to ensure the service works per the application submitted with the carriers.	6th week
5	After testing, the wireless carriers will then certify the short code and take your messaging campaign live.	6th – 8th week

Messaging Options (SMS and MMS)

There are two primary options with messaging: Standard Rate and Premium Rate.

Standard Rate SMS

In standard rate SMS campaigns, brands and companies incur the costs of sending the SMS. Large brands will typically use standard rate SMS services to interact and communicate with consumers. Some of the most popular applications for standard rate SMS include:

- Mobile alert services
- Mobile content services
- Mobile coupons
- Voting, quizzes and sweepstakes

Premium Rate SMS

Premium SMS (also known as reverse billing) is when a consumer purchases some content – multimedia or text – and has the charge applied to her cell phone bill. Companies can use premium SMS as a form of revenue or to help cover the cost of their mobile campaign/service. Examples of premium SMS include interactive voting and competitions, subscriptions alert services, two-way chat, ringtones, wallpapers and video clips.

Best Practices

Mobile marketing has a variety of guidelines, many designed to protect consumers. These best practices include:

- Simplify your service. Consumers are still adapting to messaging campaigns and services, so try to keep it straightforward before expanding into more complex services.

- Offer multiple messaging strategies. Mobile messaging is still relatively new for some consumers, so try to have numerous messaging options in order to attract as many user types and demographics as possible.
- Make your mobile service two-way. The advantage with messaging is that you get to interact directly with your audience, so take advantage of that opportunity. After all, advertisers prefer active, engaged audiences rather than passive ones, so your mobile marketing campaign should reflect that preference.
- Leverage mobile location services. Cell phones are like keys and wallets: Consumers take them everywhere. By leveraging the location technologies built into many mobile phones and networks, marketers can deliver messages to consumers based on their location. That ability helps make messaging timely and relevant.
- Ask for permission. Consumers should be able to opt into your campaign. Asking for their permission leads to a greater response rate and it avoids having your campaign perceived as mobile spam.
- Use advertising language suitable for all audiences. The call to action for the messaging service should be simple and easy enough for anyone to understand. For example, not all users will understand the term “short code” unless you define it.
- For additional tips, see the MMA’s Consumer Best Practices guidelines, which is available for download at www.mmaglobal.com/bestpractices.pdf.

Related Technologies

Interactive Voice Response (IVR)

IVR is a computerized voice system that allows consumers to interact with a voice menu. Users can respond to voice prompts by speaking or by using their phone keypad. IVR provides mobile marketers with another response channel or as an enhancement to SMS.

IVR services are rapidly being adopted in a wide range of mobile marketing campaigns and/or services. Some commonly used IVR services are:

- Recorded Services
 - Companies running recorded services, such as horoscopes, or stock information services for example, can upload their recorded content real time into the IVR system and bill it via premium SMS
- Live Contests/Votes

Companies running live competitions can accept answers via voice call and generate revenue from callers in the process. The contest results can be combined with votes collected by standard rate or premium SMS.

Bluetooth

Bluetooth is a short-range (about 33 feet) wireless technology that allows users to download applications, content and other data to their mobile phone. Mobile marketers can use Bluetooth to deliver, for example, ringtones, wallpapers and games, such as when a consumer walks past a billboard or kiosk. Bluetooth can be particularly attractive to some wireless users because unlike SMS and MMS, there are no airtime charges. That’s something to consider if a campaign is targeting price-sensitive demographics.

Mobile Search

How will people find your downloadable content? Just as people use search to explore the Internet, mobile search is playing an increasingly important role in helping users navigate the increasingly complex world of the mobile Web. As a result, mobile search is emerging as a very important user-acquisition vehicle.

Just like on the Internet, you will have two ways to participate in the search experience: algorithmic search and paid (sponsored) search. Algorithmic search involves no payment; these are the search results that the search technology determines to be most relevant. Paid or sponsored search are ad placements where advertisers pay to be placed on certain pages or with certain keywords.

The search ecosystem is still developing. Most carriers are partnering with mobile search focused companies (e.g., Medio Systems, JumpTap, InfoSpace) to provide the search application to the carrier’s subscribers. Additionally, the large Internet search companies (e.g., Google, Yahoo, MSN) are deploying their own mobile search solution. As you determine your need to drive users toward your downloadable content, we suggest you contact these companies to learn more about how they can help fill your particular needs.

WAP and the Mobile Web

The key to leveraging mobile Internet access is providing users with just the right amount of information within a navigation system that is fast and convenient to use. Unlike on their PCs, mobile Internet users are less interested in browsing and more focused on accomplishing a specific task. Being aware of this purpose-driven usage is one of the first steps to learning what kinds of content will work for your brand.

Wireless Application Protocol (WAP) is a technology platform used to create Web sites that are easily accessed from handsets, even those with small screens and limited processing power. WAP has steadily improved with each new version. Today, WAP 2.0 is standard on

most handsets, even entry-level models. WAP allows users to access a wide range of content and services, including streaming audio and video.

WAP also supports banner advertising, giving marketers and brands another tool for reaching mobile users. Mobile ad serving companies help brands reach consumers on high traffic sites such as USA Today and The Weather Channel, as well as more niche sites, such as Zoovision. Click-through rates average around 3%, while CPMs are between \$15 and \$40.

More than 60 percent of U.S. wireless customers have a handset that includes a WAP 2.0-compatible browser. This installed base includes nearly everyone who purchased a handset in the past two years. Those people also tend to be the ones who access the mobile Web most frequently. There also are roughly 50 million older handsets with WAP 1.X browsers, so the mobile Web is now available on roughly 140 million devices.⁸

Brands and marketers also should consider how consumers use the mobile Web. A May 2006 M:Metrics study found that 10 percent of mobile subscribers used the mobile Web to access news and information. As a result, it's reasonable to assume that more than 20 million U.S. wireless customers regularly go on-line with their cell phones. The number of mobile Web users also increased 5.4 percent over the previous year.

The primary means of delivering mobile content – such as ringtones, wallpaper, games and applications – is by a process known as “WAP push,” where a mobile Web page is forwarded to a handset in the form of a text message. The amount of content provided on these download pages tends to be minimal, such as only the link to download the item. However, in some cases it can involve pushing an entire microsite to a consumer's handset.

Table 4 summarizes some of the key ways that consumers are using their handsets.

Table 4: U.S. Mobile Subscriber Monthly Consumption of Content and Applications			
M:Metrics Benchmark Survey: January 2007			
Activity	Subscribers (1000s)	Percent	% Change
Sent Text Message	78,325	39.20%	2.50%
Used Photo Messaging	29,416	14.70%	-0.20%
Browsed News and Information	20,585	10.30%	2.00%
Purchased Ringtone	20,024	10.00%	5.00%
Used Personal E-Mail	16,932	8.50%	0.00%
Used Mobile Instant Messenger	12,643	6.30%	1.20%
Used Work E-Mail	10,187	5.10%	0.60%
Downloaded Mobile Game	7,288	3.60%	-2.20%
Purchased Wallpaper or Screensaver	6,903	3.50%	4.30%

Source: M:Metrics, Inc., Copyright © 2006. Survey of U.S. mobile subscribers.
Data based on three-month moving average for period ending 31 January, 2007, n= 30,567

Getting consumers to take action often means keeping the number of steps they have to take to a minimum. Now that more kinds of applications can be supported on the mobile Internet, it is possible to deliver content within a mobile browser that used to require the additional step of downloading an application.

Demographics

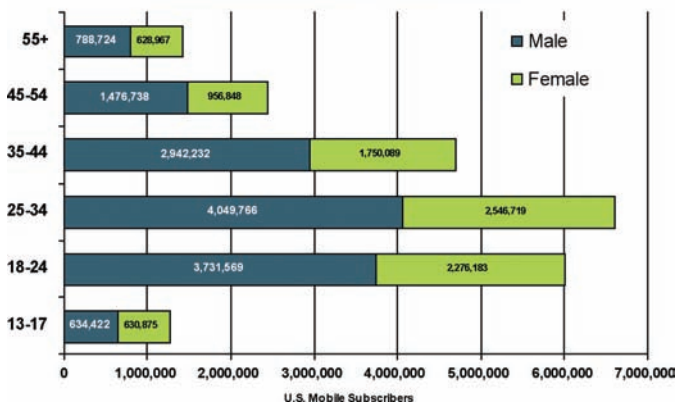
Millennials (people age 25 and younger) make up a large portion of consumers using mobile data. It's reasonable to assume that younger people will be more likely to respond to a call to action that involves using the Internet browser on their phone. However, there are a large and growing number of older mobile Internet users with high-end smartphones. They regularly check their office e-mail on their BlackBerry, Palm or other smartphone, and those e-mails often drive them onto the mobile Web, such as via a link embedded in an e-mail. This usage highlights why it's a mistake to assume that mobile Web usage is limited to the youth demographic. The figure 2 below illustrates this age break-down.

⁸ M:Metrics - WAP Statistics three-month average ending February 28, 2007.

Figure 2: News and Information Browsing in Month by Age/Gender

Source: M:Metrics

Three-month moving average for month ending 31 January, 2007, n=30,567



Source: M:Metrics 2007

African Americans, Hispanics and Asians index higher on mobile data usage. In fact, the U.S. Hispanic population’s wireless bills are 10% higher than the national average.⁹

With nearly 9.6% of all consumers using the mobile Internet, the United States¹⁰ has now joined a growing number of countries worldwide that have a substantial population of mobile Internet users, including Japan (40%) China (20%, urban), Australia, (9%), UK (9%), and South Korea (9%).¹¹ As more kinds of content and activities become available on the mobile Internet in the United States, expect to see this percentage grow even more. In many cases, consumers may prefer to access the Internet from their mobile device when and where they have the urge, rather than waiting until they’re near a computer.

Development Time and Cost

Because mobile Web sites tend to be smaller, less complex and contain fewer graphic elements, they generally take far less time to develop than PC-oriented sites. However, the real key to designing for the mobile Web is being able to tailor content delivery to specific devices. So for more high-end or complex sites, it is recommended to use a content management system (CMS) that has been specifically developed for the mobile Web. The CMS will allow you to hide links to content, such as streaming video, that would not be supported on lower-end handsets and would only frustrate those users. Also, based on individual handset characteristics, you can provide a richer overall experience to handsets that support it.

In general, a basic consumer WAP site can be developed and launched for \$50,000 to \$100,000, depending on the specific content requirements, such as database integration and user customizations, as well as the makeup of the development team. More complex sites that require submission forms and integration with third-party data sources will be more costly.

The most inexpensive WAP pages are those that a consumer might get to by clicking on a banner and that provides a small amount of content, such as a form, a click-to-call number or a link to download a single item of content. However, because every device is a bit different, for any content that is downloaded to the phone from a WAP page, there should be a back-end system in place to ensure that the right version of the content goes to each handset model.

Best Practices

There are a number of additional resources for information about designing content for the mobile Web, including the MMA’s WAP banner ad standards document.¹² Here are some basic rules of thumb for developing mobile Internet content:

- Keep content relevant and brief
- Provide a site-wide link back to the home page
- Let registered users have the option of automatic sign-in
- Vertical scrolling should be kept to fewer than five screens unless the user has requested more (e.g., by clicking on a link to view an entire article)
- Graphics should be kept to a minimum
- No frames or pop-ups, which mobile browsers rarely support
- Forms do not require case-sensitive text entry
- Status indicators are provided on sub-screens and forms (e.g., step 2 of 4)

Pros and Cons

- The mobile Web can be a fairly cost-effective way to extend mobile and online marketing efforts. Other benefits include:
 - It can support consumer’s needs to browse and pre-select key content on the desktop for later on-the-go access
- WAP banner advertising is now a viable way to reach consumers
- A WAP page can be pushed to a consumer’s phone once they have opted-in via a text message, making the site-discovery process very easy
- Media-rich mobile sites such as Pod2Mob.com or Zoovision.com are pushing the boundaries for what can be delivered
- Some of the things that continue to make the experience of using the mobile Web frustrating include:

⁹ In-Stat/MDR “Psychographics and Demographics of Wireless Data Subscribers,” April 2004.

¹⁰ Source: M:Metrics, 2007

¹¹ Forrester’s APCTAS Q1 2006 Survey, Forrester’s NACTAS 2006 Benchmark Survey, and Forrester’s Consumer Technographics® Q4 2005 European Study

¹² Available at www.mmaglobal.com/mobileadvertising.pdf.

- Phones and wireless operators that don't support content downloads from a WAP page
- Phones with browser software that make it difficult for a consumer to enter the address for a mobile site

There are still a large number of U.S. consumers who have yet to discover the mobile Web and who may not perceive it as worth the added expense of a data plan. That limits the addressable market for a mobile campaign.

Streaming Media

Streaming content is media (video, audio, text) that is consumed while it is being delivered. The term "streaming" reflects the delivery system approach and can be on-demand or live. On-demand streams are stored on a server and are available to be transmitted at a user's request, while live streams are available only while the associated event is occurring, such as a video stream of a live sporting event. Advertisements, although typically pre-recorded, can be appended to either on-demand or live streaming content.¹³

There are primarily three non-intrusive approaches recommended for using streaming content in a mobile marketing campaign:

1. Access to advertisement subsidized content (e.g., movie clips, mobile mini-series). Some mobile TV services – such as MobiTV's streaming video service – include advertisements. The operator may be doing this to increase revenue or to subsidize the offering in lieu of raising the consumer's cost. Cingular, Sprint and Verizon all offer a branded mobile video service, and all of those services have begun to explore the idea of integrating ads into their content; however, they have not yet made a commitment to ad-supported video content.

When GoTV Networks, a mobile video service, launched a new mobile reality show called "Primped" (a makeover contest), it had more than 12 advertisers with branded integration in the show, representing 15-20 percent of the show's budget.¹⁴ A July 2006 study by Knowledge Networks, *How People Use Mobile Video*, has found "89% of those who watch live, streaming video would watch content that includes commercials if they weren't charged."¹⁵

2. Opt-in for video ads associated with incentive programs such as "a chance to win," free minutes, or an awards program. In May 2006, Virgin Mobile USA offered its customers free airtime minutes in exchange for viewing and providing feedback to a short, text-based advertisement. Those who opt-in to this program, called "Sugar Mama,"

were asked to view a short streaming video advertisement and answer questions to show that they watched the segment. Correct answers earned customers free airtime minutes.¹⁶

3. Branded entertainment (e.g., advertisements that are considered good enough to watch themselves, due to humor or other entertainment value). Similar to the popularity of beer commercials during the Super Bowl game, some advertisements are so entertaining that people will search them out.

In the U.S. market, most streaming currently is "on-deck": on a portal controlled by the wireless carrier. However, as the U.S. market evolves, more off-deck options (similar to independent retail stores) such as Zoovision.com are appearing. (By comparison, Europe sees 40% to 70% of mobile content being sold off-deck.) Off-deck considerations include related laws, regulations, best practices, and billing, with premium SMS currently one of the most common and simplest billing methods.¹⁷

Reach and Demographics

The July 2006 IDC study, *U.S. Wireless Cellular Television and Video 2006-2010 Forecast: Grand Visions for the Small Screen*, found that about 7 million U.S. cellular subscribers and customers in 2006 will be paying for some form of TV/video content and services on their mobile devices in 2006. IDC's survey data suggest that a mix of on-demand clips and live streaming content is the most appealing to consumers.¹⁸

A recent PEW study indicates that only 2% of U.S. cell phone users currently watch videos or TV programs on their mobile phones, while 14% would like to have this feature. The study also found that 5% of the cell phone users between the ages of 18 and 29 are watching videos or TV on their mobile phone today, while 23% would like this feature. The next most interested group was ages 30-49, with 1% currently viewing and 15% saying they would like this feature.¹⁹

Likely groups to watch mobile TV are mobile professionals, teenagers and children, with the latter two groups reflecting the earlier adopter and "cool" factors of the audience and a frequent "anything for the children" attitude of their parents. A July 2006 research report by Quaestor found that "87% of children [ages 10-12] would like to watch TV on their mobile, and 91% would watch mobile TV

¹³Based on definition found at http://www.reference.com/browse/wiki/Streaming_media

¹⁴"Tiny Time Slot, Big Plan - Mobile Makeover Series from GoTV Features Integrations," <http://www.tweek.com/article.cms?articleId=30182>, July 17, 2006.

¹⁵Press Release at http://www.knowledgenetworks.com/info/press/releases/2006/071106_hpumv.htm, July 11, 2006.

¹⁶"Virgin Mobile: Watch Ads, Earn Minutes," <http://www.imediaconnection.com/news/9800.asp>, May 31, 2006.

¹⁷"FEATURE: Payments, billing key to off-deck success," <http://www.fiercemobilecontent.com/story/feature-payments-billing-key-to-off-deck-success/2006-09-15>, September 15, 2006

¹⁸Lewis Ward, IDC, "U.S. Wireless Cellular Television and Video 2006-2010 Forecast: Grand Visions for the Small Screen," Doc #202196, June 2006, 39 pages.

¹⁹Pew Internet & American Life Project, Associated Press, AOL cell phone survey. March 8-28, 2006. N=1,505(752 contacted on landlines and 751 contacted on their cell phones). In all, 1,286 cell users are in the sample. The margin of error for the cell-using population is ±3%. http://www.pewinternet.org/pdfs/PIP_Cell_phone_study.pdf

while traveling. Content preference varied among the sexes, with girls favoring soaps and boys preferring sports, although entertainment channels featuring shows such as 'Lost' and 'Hollyoaks' were popular across the board. Some 72% of children said they would watch cartoons on their phone, ahead of 62% who would watch music videos." Mobile TV is not expected by Quaestor to replace TV viewing but rather supplement it by offering another channel, "just as listening to music via mobiles has not replaced MP3 players."²⁰

As a case example, U.K. wireless carrier 3 says that the 2006 FIFA World Cup triggered a massive surge in the uptake of mobile TV, with more than 3.6 million viewings of its World Cup mobile programming, pushing mobile TV usage to an all time high, up 61% on the month prior to the tournament. 3 provided three dedicated World Cup mobile TV channels with a wide range of content, including extended match highlights of each game five minutes after the final whistle, and 'Berlin or Bust', the world's first made-for-mobile sport magazine show. All of 3's 3.5 million customers could tune in to watch the coverage for free, which helped boost average weekly TV viewings during the World Cup period to more than 740,000.²¹

Development Time and Cost

Mobile streaming content requires special storage equipment, device rendering services and network access, as well as digital rights management, in some cases. The wireless service provider often handles all of these tasks, with the brand or advertising agency paying and upfront per-usage fees.

You also should consider the time and cost of creating streaming content. This can vary widely, from free to millions of dollars, depending upon the development approach and the celebrity standing of the participants. Ideally the final video should be available about two weeks prior to launch to identify and resolve any technical issues.

Best Practices

- Keep it brief. Results will vary, so these guidelines should be used as appropriate. For short clips ("bumpers") before or after a video, 10 to 15 seconds is a general rule of thumb, and it may be acceptable to have it less than 10 seconds. For branded m-bisodes, the recommendation is two to five minutes.
- Use ads relevant to the mobile user. Mobile ads should include a call to action that is relevant to an out-of-home viewer. For example, "Find a BK now" links to a WAP page, where hungry consumers can enter their zip code to find the closest Burger King.

- Accommodate small screens. To ensure a good viewing experience on a display that's only a few inches across:
 - Videos should be more graphical and less detailed
 - Actor selection processes may need adjustment. Faces that show expressions on small screens tend to be long, rather than round, with dark hair and dark eyebrows.
 - Avoid panning shots, which often create a dizzying and blurred effect on the small screen.
- When the packaging works, consider integrating streaming video into mobile campaigns by providing a link via messaging or WAP interface.

Pros and Cons

- If the user requests content that is clearly identified as ad-supported, then there are no permission issues. (See Pod2mob.com for a good example of off-deck streaming audio that is also ad-supported.)
- When done well, streaming video or audio can be memorable, such as through entertainment, novelty or shock approaches. In addition, as with some of the other types of mobile marketing techniques, the advertisements can be targeted at specific consumer markets based on the content being requested and sometimes there is demographic information associated with the mobile number.
- On the negative side, how much video can a consumer really watch on screens as small as one inch across? Mobile marketing associated with mobile television is likely to be most impacted by the small screen size. This issue may be partially mitigated by some of the larger-screen smartphones, but other mobile video technologies, such as the iPod with its large display and high-quality sound, may be the long-term winners for mobile videos.
- A July 2006 study by Knowledge Networks, How People Use Mobile Video, found that half the people who subscribe to mobile video services don't actually use them. This finding suggests that mobile marketing that uses streaming content might have a limited reach.
- Perhaps the greatest current limitation of streaming content is the limited audience due to two factors: the number of deployed handsets that can support the technology, and the consumer's willingness to pay for data services. Strategy Analytics estimates that 32% of all handsets sold in North America during 2006 were capable of handling streaming music (e.g., phones with MP3 playback) and that 23% of all handsets sold in North America during 2006 were capable of handling streaming video (e.g., phones with MPEG4 playback).²²

²⁰"Mobile TV is a hit with children looking to share clips with friends," <http://www.brandrepublic.com/bulletins/digital/article/568624/mobile-tv-hit-children-looking-share-clips-friends/>, July 11, 2006.

²¹"3.6 Million Viewings of FIFA World Cup Games for 3G Operator," <http://www.3g.co.uk/PR/July2006/3336.htm>, July 13, 2006.

²²"Information provided directly from Strategy Analytics on September 28, 2006.

Downloadable Content

Downloadable content often is used to entice consumers into participating in a mobile marketing campaign. It is the offer that extends the brand either in the process of delivering the content and/or in the actual final download.

The download may be a song or ringtone, theme or wallpaper, video, game or other application. It is most commonly received on the handset through a Wireless Access Protocol (WAP)²³ link in an SMS message. WAP requires users to have an Internet-enabled phone and a wireless data plan. Marketers should be aware of those two requirements because they affect the amount of wireless users who can be reached with a WAP-based campaign. For some carriers (i.e., Verizon and Alltel), you will need to deliver the content and/or application via MMS because they have “walled gardens,” which prevents customers from visiting a WAP link that the carrier hasn’t approved. Other issues include technical complexity around (1) how carriers enable downloads to their customers, and (2) requirements for different devices make it necessary for brands to partner with a mobile content delivery expert to ensure a consistently positive experience for their customers.

Mobile campaigns with downloadable content can reach customers through standard media vehicles, including product packaging and promotions, print advertising and on-line communications. Brands and agencies frequently have to educate consumers about how to participate in a mobile campaign. Effectively communicating the offer and the download instructions has been a challenge for some campaigns.

So far, the Internet has been the No. 1 vehicle for communicating mobile campaigns because brands can incorporate instructions and demos to assist with communicating the campaign message and instructions at the lowest possible cost. The key to success with content downloads is relevancy and place: delivering something meaningful to the customers, at the right time.

After SMS, downloadable content has been the next most successful tactic of mobile campaigns. Content providers and carriers have spent the past few years educating consumers about downloadable content, why they want it and how to get it. Experiences across carriers have varied greatly, often due to differences in carrier platforms, consumer acceptance and device capabilities.

Table 5 summarizes the pros and cons of downloadable content.

Pros	Cons
<ul style="list-style-type: none"> • Relatively inexpensive for certain types of content • Mobile is hip and cutting edge, so your brand is perceived as hip and cutting edge • Downloadable content offer can be expressed across all media – works particularly well in conjunction with Web marketing • Great well to expand beyond your current online relationships/tactics with your customer – to mobile 	<ul style="list-style-type: none"> • Very expensive for certain types of content • Project Complexity: (1) Coordinating with multiple partners (Agency + Service Delivery Team) and (2) CSC and carrier approvals if SMS will be used to deliver content. • Is your target demographic 18-36/open to mobile? • Not supported on all carriers

Reach and Demographics

As of 1Q 2007, there were more than 232 million wireless customers in the United States, according to CTIA – The Wireless Association.²⁴ According to Telephia’s Q4 2005 data (Table 6), over 50% of U.S. wireless subscribers have data-enabled phones. These statistics are noteworthy because they show the addressable market for a mobile campaign.

	Penetration Rate (%)			
	Q1 2005	Q2 2005	Q3 2005	Q4 2005
Data Charge	43%	45%	47%	50%
SMS Charge	34%	36%	40%	41%
Web/WAP Charge	8%	9%	11%	13%
MMS Charge	8%	9%	11%	13%
Downloads Charge	8%	10%	10%	11%

Source: Telephia Customer Value Metrics, Q1-Q4 2005

Of these 115 million-plus subscribers, only approximately 20 million download content that incurs a fee beyond airtime. As the number of data users grows, the research suggests correlated growth of SMS, Internet access, MMS and Pay-for-Download usage.

Development Time & Cost

Worth noting, there are some dependencies that set the project timeline for mobile campaigns with downloadable content.

Delivery Methods

Mobile marketers have a variety of options besides SMS, MMS and Bluetooth for delivering content. These include:

²³For more information about WAP, visit www.wapforum.org/what.

²⁴For updated U.S. statistics, visit www.ctia.org.

- **Delivery Via CSC:** Once the consumer has opted to receive the content via sending a text message or from a Web site, the content can then be sent via a WAP push or an SMS message with an embedded link to a WAP site. Once on the WAP site, they can download the content to their phone. This is the most user-friendly form of content delivery. However, this method does not yet work with the Binary Runtime Environment for Wireless (BREW) handset platform. For BREW25 platforms, the delivery of the content would be via MMS.
- **Delivery Via WAP Pull:** Marketers have the option of asking the consumer to key in the URL of a WAP site on their handset's browser. Once on the WAP site, information about their handset's capabilities (e.g., screen size and resolution) can be captured so that the downloaded content will provide a good user experience. This method of content delivery is somewhat more cumbersome for consumers, especially if they are not that familiar with their phone's Web browser.
- **Side-Load Delivery:** Content can be offered on a Web site, where the consumer can then download the content to their desktop. Then the content is transferred from the computer to the phone via a cable, Bluetooth or infrared. This method requires to consumer to have some method of connecting their phone to their PC. This method may work for some kinds of content on BREW handsets.
- **Bluetooth and Infrared Delivery:** Bluetooth and Infrared content beaming is another way that marketers and brands can use to distribute mobile content. "Bluecasting" kiosks are becoming an attractive option to marketers within retail environments and public spaces, such as airports. However, for Bluetooth, it requires that the FTP feature be installed on the device. Some U.S. carriers have intentionally not included that Bluetooth profile on their handsets. Also, it requires the consumer to have some knowledge of how to use Bluetooth (e.g., turn their device to "discoverable" mode and know how to receive beamed content). All of these factors limit the addressable market for a Bluetooth-enabled campaign. Infrared delivery, meanwhile, is slower and less reliable.

Carriers' perspectives on the delivery of free branded content via any of these methods are mixed. With the latter two, there is virtually no way for them to capture any direct revenue.

²⁵For more information about BREW, visit www.qualcomm.com/brew.

Case Studies

Neutrogena Get Smooches

Client: Neutrogena

When: Launched 5/2006; still running.

Background: When Neutrogena decided that mobile should be an important element of the launch campaign for their new Moisture Shine Lip Soothers, Ipsh! considered a variety of approaches to spread the word amongst Neutrogena fans, and potential new customers. While we have had previous experience promoting new consumer goods via sweepstakes, giveaways and other such promotions, the decision to take the Smooches campaign in a viral direction posed a new and interesting challenge. When considering what types of messages might produced the desired viral effect amongst the core audience, the idea of a “secret” message, from an unknown admirer, surfaced. And what secret message could be more compelling or intriguing than a kiss, even a kiss sent in a digital format? Thus the Neutrogena Smooches concept was born—created to allow young women to send a variety of different “kisses” to the important people in their lives, without having to immediately reveal who it was from.

Objectives: Create a viral mobile and Web campaign to support the launch of new Moisture Shine Lip Soothers from Neutrogena.

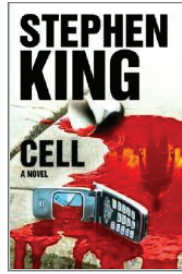
Solution: The Neutrogena Get Smooches Campaign is initiated via a branded Website, with the simple menu instructions of “send a smooch” or “get your smooch” splashed across the bottom of the homepage, underneath a graphic of a cell phone and the message “Get your kiss on!”. The site is clearly branded by Neutrogena, but is not cluttered with an array of product information or sales incentives. Once an interested user clicks on the “send a smooch” icon, he or she is directed to a page that displays six different sets of lips, in six different shapes and colors, that correspond to six different types of smooches, ranging from the “hug smooch” to the more sophisticated “rock star smooch.” The user simply has to choose a favorite, enter in a friend’s cell phone number, and select an accompanying message from a pull-down menu to send with the smooch itself. The messages are categorized according to the type of recipient the smooch is being sent to, ranging from get-well wishes to coy, “secret admirer” taglines. The transaction is playful, fun and requires minimal time and effort. The most significant and compelling element of the campaign is, naturally, the actual message that the recipient receives. That is to say, the very fact that someone might pick up their cell phone, thinking they are receiving a normal SMS, and be greeted instead by a pair of lips smacking a kiss to them through the small screen of their mobile device, is fairly simple in its design but sophisticated in terms of its anticipated creative impact. These mobile smooches demonstrate, once again, that the team at Ipsh was more than happy to work with the specific requirements of

the Neutrogena Moisture Shine brand and develop a truly customized solution, as opposed to simply adapting a tried-and-true SMS campaign that had, in fact, been developed for a far more general purpose. The campaign does not require the user to step outside his or her comfort zone with text messaging (already a familiar practice for most Americans), and yet delivers an innovative message within that established SMS language.

Results: Of the over 22,000 “smooches” that have been sent since the campaign launched in May 2006, 65% of them were sent via mobile, as opposed to via email, demonstrating that mobile is the preferred medium for sending a smooch, as Ipsh intended. Approximately 20% of the smooches sent were referred, indicating a successful viral element to the campaign, as was hoped for. The traffic flow anticipated, wherein a certain number of smooch recipients became motivated to send their own personal smooches upon visiting the site to redeem their smooch code, was clearly initiated successfully. The very idea that Ipsh! was able to take a cosmetic product like Moisture Shine Lip Soothers and promote it in a highly visual manner (using the various lip icons) using a technology that can be considered limiting at times because of the confines of simple text (SMS) is groundbreaking in its own right and shows that a brand need not invest in complex multimedia content (that is often limited to users of only the newest and most sophisticated mobile devices) to deliver a powerful message regarding a new product or promotion.

Stephen King Mobile

Background: Simon & Schuster chose Flytxt to launch a mobile marketing program to promote the release of Stephen King's new book, Cell. A best selling author, Stephen King has produced some of the scariest fiction ever written. In January 2006, Simon & Schuster released the much anticipated new novel, Cell. The horror novel was described on King's official Website as "zombies set in motion by a pulse, a bad cell phone signal that destroys the human brain." Simon & Schuster would support the mobile program with a significant advertising campaign online and in book stores.



Client Objectives:

1. Build a database of mobile users for marketing this Stephen King book and future book releases.
2. Drive book sales by raising awareness of the new book with Stephen King fans and by reaching new readers with buzz.

Solution: Flytxt worked with Simon & Schuster to develop a multi-faceted mobile program that featured both text messaging, mobile content, and an online component.

The first phase of the program concentrated on user acquisition. A micro Web site was created for the mobile program: www.cellthebook.com. Banner ads and e-mail blasts drove fans of Stephen King to the new site to read more about the new book and sign up for the VIP mobile club.



Members of the VIP mobile club played weekly trivia contests via SMS, received personal messages from Stephen King, and entered to win exclusive prizes such as a signed copy of the Cell manuscript.

A second objective was to increase sales of the new book by reaching readers beyond the hardcore King fan base. To extend the reach of the campaign and encourage viral transmission, Flytxt designed a fun 'pulse sending application' for the Web site. Site visitors could listen to an audio file of the actual Pulse sound and then send the zombie-making Pulse to their phone or a friend's phone.

Each pulse message that was sent included a reminder to pre-order the book at cellthebook.com.

Thirdly, to generate revenue and further promote the new book,

Flytxt set up a mobile content storefront on the Web site featuring premium wallpaper images and talktones from Stephen King for download.



Results: Simon & Schuster and Stephen King were extremely pleased with the buzz this mobile program created and the results it produced. This mobile program received a great deal of media attention and was even featured on the front page of the Wall Street Journal Marketplace section.

- Results for the mobile program were measured in three ways: 1) number of mobile users acquired 2) ongoing participation rate and 3) book sales.
- Acquired users. Although actual numbers for acquired users couldn't be disclosed, the mobile site attracted thousands of visitors each day, many of whom sent the pulse to their friends and/or joined the mobile club.
- Ongoing participation. For the three months the campaign was live, the weekly trivia contest enjoyed an average response rate of nearly 75% within the first three hours of each broadcast.
- Book sales. The mobile program helped Simon & Schuster achieve a new sales record for the highest number of pre-orders ever for a Stephen King book.

MSNBC.com Mobile and Action Engine

Published: November 17, 2006

Brand: MSNBC.com



Product: Award-winning news site MSNBC.com wanted to augment their current mobile Internet offering with a downloadable mobile news application featuring an advertising business model. With this download, MSNBC.com would give consumers access to MSNBC.com

news, videos, and pictures using their wireless device.

Unlike paid subscription services, the launch of MSNBC.com Mobile provided consumers a service free of charge by incorporating video and banner advertisements within the service.

Company: Action Engine Corporation

Partners: Advertisers and agencies

Goals:MSNBC.com created three key goals that they followed to launch the MSNBC.com Mobile service in the market:

1. Deliver a superior user experience – MSNBC.com wanted to give their consumers a better experience than could be obtained with their standard WAP-based service. They wanted to offer a downloadable option that would create a permanent home for the MSNBC.com brand on the device.
2. Offer the service without a subscription fee by subsidizing it with advertising – “As one of the most successful news sites in the world, it’s critical that we are available to consumers wherever they may be. The goal of this program is to deliver the MSNBC.com experience without penalizing consumers with yet another subscription fee,” said Catherine Captain, vice president of marketing for MSNBC.com.
3. Incorporate MSNBC.com’s rich multimedia capabilities – MSNBC.com is known for the rich multimedia services they offer on the Web. The company wanted to translate this competitive advantage seamlessly to the mobile phone medium.

Solutions: Based on those goals, MSNBC.com selected Action Engine Corporation to build a downloadable application that consumers could use to search for and discover mobile Internet content like news stories and videos without having to suffer through painful typing on a tiny device keypad and frequent between-click connection delays.

MSNBC.com Mobile utilized several key features of the Action Engine Mobile Application Platform to deliver consumers a superior user experience. These features include the ability to:

- Read news articles including Top Headlines, US News, Business News, World News, Entertainment News, Sports News, Tech/Science News, and Health News
- Watch up-to-the-minute Headline, Business, and Technology News videos
- Watch popular slideshows such as The Week in Pictures, Celebrity Sightings, and The Week in Sports Pictures
- View video from The Today Show and other NBC News properties
- Email/SMS news articles to friends
- Create a “My Saved Articles” folder where consumers can store content offline to read later

Advertising Insertion

Advertising was inserted throughout the MSNBC.com Mobile service using the Action Engine Mobile Advertising Engine. Using this Engine, MSNBC.com was able to sell advertising space for the mobile service and insert cached, contextually relevant advertisements throughout an application in the form of headers, footers, banners, paid search placements, and video commercials.

Within MSNBC.com Mobile, banner advertisements were placed both offline and online throughout all screens contained within the service. Pre-roll video clip advertisements were also inserted into the video portions of the service.

Direct to Consumer Launch

Upon completion of the mobile application development and advertising insertion, MSNBC.com launched their mobile service in April of 2006. The service was initially launched on Windows Mobile devices with Java and BREW device support scheduled to follow.

Consumers could download MSNBC.com mobile directly by visiting www.gomobile.msnbc.com.

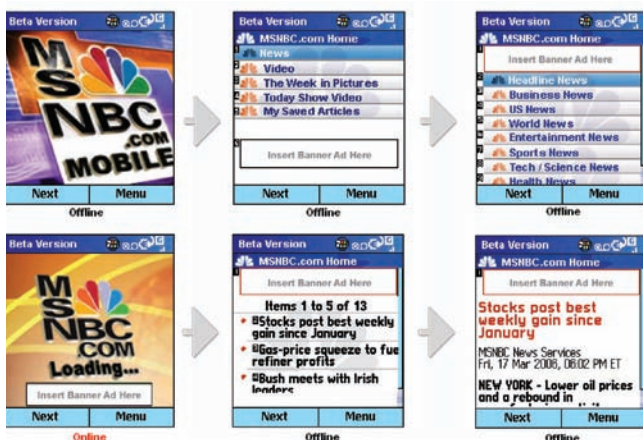
Results:

Usage Results: Following the launch, MSNBC.com saw strong usage of the service and interest in the advertisements. MSNBC.com enjoyed click through rates that were more than double the rates they were seeing with their Web-based advertisements. Consumers were using the service to access content in excess of 20 times per user per month on average.

“As a leading news site, MSNBC.com is constantly striving to provide the optimal digital news experience for consumers. We recognized early on that mobile phones provide a convenient channel to give consumers the news and video they want while ‘on the go’ and therefore pursued a strategy to distribute our content through multiple mobile products, including an MSNBC.com

WAP site and an on-device ‘Multimedia on Mobile’ news portal built in conjunction with Action Engine Corporation. While the WAP site leverages the Internet browser to reach the broadest audience, the ‘Multimedia on Mobile’ on-device portal offers our customers a rich, highly usable content experience, exposing MSNBC video and slideshows and enabling personalization and messaging. The on-device portal also enables our advertisers to reach consumers through both display and pre-roll ads in an engaging environment, which we believe will drive high click-through rates,” said Dan Mocha, director, business strategy and development, MSNBC.com.

- **Consumer Feedback:** The companies solicited consumer feedback on the launch to discover and deliver a rewarding consumer experience. Feedback included:
 - “This is what the mobile experience should be like. So far everything looks and works great. Keep up the good work.”
 - “The service works great. Light download, easy instructions and the video, slideshows, news comes in great and streams very well, the best I have seen on any service.”
- **Press/Analyst Feedback:** The launch of the MSNBC.com Mobile download service was covered favorably in the press as well. Wireless industry analysts from Fierce Wireless stated that “the mobile content sector is moving toward an ad-supported model...ad-subsidized video content, like that tested by MSNBC, will probably open the market to a wider audience, even consumers that may have previously scoffed at the idea of watching video content on a 2.5-inch screen.”
- From the Washington Post: The launch was “a watershed event for the industry...media brands have traditionally given away content for free, and they are interested in transferring that model to cell phones. It’s a great time to be testing the market.”



The Weather Channel Develops a Wireless Download Application Using BREW and Java Technologies

Published: 12-Oct-2004

Brand: The Weather Channel

Product: A mobile application reporting the latest weather

Company: The Weather Channel

Partners: The Weather Channel

Goal:

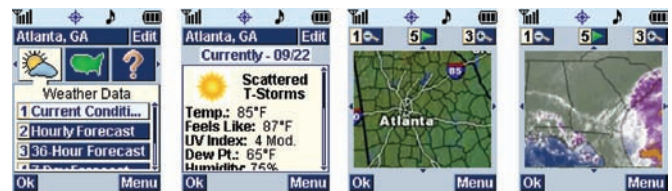
- Extending The Weather Channel brand to wireless devices
- Delivering anytime, anywhere access to weather information

Solution:

- The Weather Channel developed a wireless download application using BREW and Java technologies.
- Offered as a subscription product, the application provides current conditions, detailed forecast information, and animated color radar images through an easy-to-use interface.

Results:

- Wireless subscribers are now able to access the latest weather reports while away from their televisions and computers.
- By accessing The Weather Channel information on their wireless devices, subscribers have all the tools to better plan their activities throughout the day. During severe weather events such as hurricanes, the animated radar maps have proven extremely valuable, especially when television and phone lines are hit by outages.
- The Weather Channel brand was successfully extended to wireless devices, allowing consumers to access the weather information they need when they need it.



VML & Crisp Wireless

Published: November 22, 2006

BURGER KING – MOBILE WEBSITE

Brand: Burger King

Product: On-going mobile destination for Burger King customers

Company: VML (www.vml.com)

Partners: Crisp Wireless

Goals:

- In the spirit of “Have it Your Way™,” Burger King wanted to offer their on-the-go customers a persistent mobile Internet destination where they can get key information and interact with the brand anytime, anywhere.
- Integrate mobile with other key marketing tactics happening online, such as movie, game and sponsorship related promotions
- Collect valuable user data about what Burger King customers want access to on their mobile devices

Solutions:

In April 2006, VML launched the Burger King mobile Website at wap.bk.com. The site, which was initially developed in-house, was quickly migrated onto the mLogic WAP platform from Crisp Wireless, which facilitates dynamic content adaptation based on the differing handset characteristics.

Core features of the site are the Find A BK mapping tool, nutritional and allergen information, and downloads that allow Burger King customers to customize their phone.

Results:

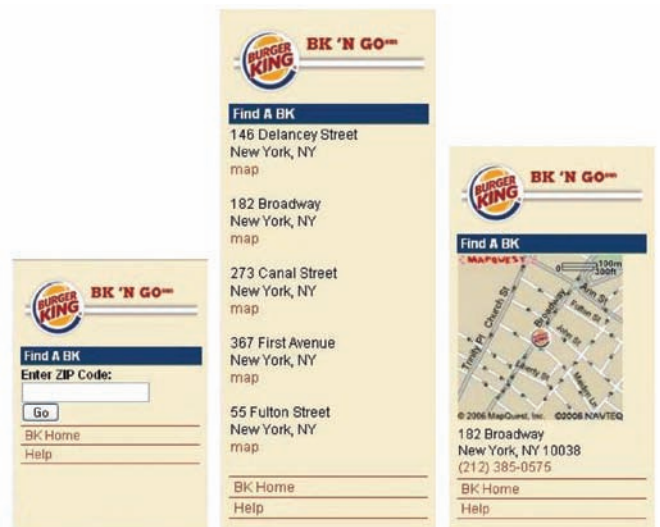
- The Find A BK feature has been one of the most frequently used elements of the mobile site, driving additional traffic to Burger King restaurants around the country.
- The mobile site has become an important tool for extending Burger King sponsorship and promotional activities through free downloads and other mobile content related to BK Racing (NASCAR), The Fast and the Furious, Tokyo Drift, and more.
- The site has been featured in numerous publications and has been integrated with a number of mobile media campaigns running on other mobile destinations such as USA Today, CBS Sports, NBA mobile and Maxim Mobile.
- Burger King has successfully used mobile banner ads on various sports and lifestyle content mobile sites to drive traffic to the Burger King mobile site.



BK N’GO Homepage



Wallpaper downloads



Find A BK Application



Mobile Site Integration with Desktop Content

Who We Are

About the Mobile Marketing Association

The Mobile Marketing Association (MMA) is the premier non-profit global association that strives to stimulate the growth of mobile marketing. The Mobile Marketing Association is an action-oriented association designed to clear obstacles to market development, to establish guidelines and best practices for sustainable growth, and to evangelize the mobile channel for use by brands and third-party content providers. MMA members include agencies, advertisers, hand-held device manufacturers, wireless operators and service providers, retailers, software and services providers, as well as any company focused on the potential of marketing via the mobile channel. The Mobile Marketing Association's global headquarters are located in the United States.

Mobile Marketing Strategies & Best Practices Committee

The Mobile Marketing Strategies & Best Practices Committee, chaired by OgilvyInteractive and R/GA, is establishing a library of best practices in an effort to share learning across the industry.

The Mobile Marketing Strategies & Best Practices Committee developed this white paper in collaboration with representatives from: Action Engine, Alcatel-Lucent, go2, ipsh!, Juice Wireless, Kikucall, Medio Systems, MX Telecom, OgilvyInteractive, Reuters, R/GA, Sensei, Inc., Sybase 365, Telephia, and Vibes Media.

References

The following links provide additional sources of information and reference:

- MMA Consumer Best Practices Guidelines (www.mmaglobal.com/bestpractices.pdf)
- Mobile Marketing Association website (www.mmaglobal.com)

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Appendix

M:Metrics' January 2007 survey numbers show a slight upturn in the overall percentage of subscribers downloading ringtones, wallpaper or mobile games.

Table 7: U.S. Mobile Subscriber Monthly Consumption of Content and Applications M:Metrics Benchmark Survey			
January 2007			
Activity	Subscribers (1000s)	Percent	% Change
Purchased Ringtone	20,024	10.00%	5.00%
Purchased Wallpaper or Screensaver	6,903	3.50%	4.30%
Downloaded Mobile Game	7,288	3.60%	-2.20%
Source: M:Metrics, Inc., Copyright © 2006. Survey of U.S. mobile subscribers.			
Data based on three-month moving average for period ending 31 January, 2007, n= 30,567			
May 2006			
Activity	Subscribers (000s)	Percent	
Purchased Ringtone	18,830	9.9%	
Purchased Wallpaper or Screensaver	6,609	3.5%	
Downloaded Mobile Game	4,840	2.5%	
Source: M:Metrics, Inc., Copyright 2006. Survey of U.S. mobile subscribers. Data based on three-month moving average for period ending 31 May, 2006, n= 33,952			
February 2006			
Activity	Subscribers (1000s)	Percent	
Purchased Ringtone	18,635	10.0%	
Purchased Wallpaper or Screensaver	7,292	3.9%	
Downloaded Mobile Game	5,488	3.0%	
Source: M:Metrics, Inc., Copyright 2006. Survey of U.S. mobile subscribers. Data based on three-month moving average for period ending February 28 2006, n=35,112			
November 2005			
Activity	Projected Monthly		
Reach (000s)	Percent		
Purchased Ringtone	16,467	9.1%	
Purchased Wallpaper or Screensaver	6,616	3.7%	
Downloaded Mobile Game	5,683	3.1%	
Source: M:Metrics, Inc., Copyright 2005. Survey of U.S. mobile subscribers. Data based on the quarter ending November 30, 2005, n= 37,329 U.S. mobile subscribers			



The Mobile Marketing Association (MMA) is the premier global association that strives to stimulate the growth of mobile marketing and its associated technologies. The MMA is a global organization with 400 members representing over twenty countries. MMA members include agencies, advertisers, hand held device manufacturers, carriers and operators, retailers, software providers and service providers, as well as any company focused on the potential of marketing via mobile devices.