Mobile Advertising and Marketing

Mobile Advertising and Marketing is the third consecutive report analysing the rise of mobile advertising on the global market.

This strategic research report from Berg Insight provides you with 150 pages of unique business intelligence and expert commentary on which to base your business decisions.

This report will allow you to:

- **Identify** tomorrow’s most profitable advertising opportunities in the mobile space.
- **Understand** the fundamentals of the ad-based mobile media revenue models.
- **Recognise** the key barriers restraining the growth of the mobile advertising market.
- **Comprehend** the relative importance of digital channels compared to other advertising media.
- **Learn** about the early experiences of mobile marketing campaigns by top global brands.
- **Profit** from valuable insights about ad-funded business models for mobile operators.

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Who will be the winners in the mobile advertising race?

Mobile communication is a global phenomenon that has thoroughly changed the way people interact with each other. More than 4 billion subscribers are using mobile services every day, more than twice the number of traditional Internet users. Mobile devices have several unique characteristics that make them highly suitable for advertising and marketing. Handsets are extremely personal devices since they are owned and used by one person. They are almost always with the person, which allows contextual targeting of people on-the-go. Being switched on at almost all times, they also allow advertisers to reach the consumers in the right moment. Since today’s mobile handsets are highly interactive devices and are featured with a range of functions including video players, music players, cameras and web browsers there are many different options for interaction. Another major benefit is that the mobile space is less crowded than most other channels whereby adverts get more attention.

For these reasons mobile is becoming a natural part of the marketing media mix. Handsets are highly private devices that offer a unique platform for personal interaction with consumers. Advertisers are increasingly aware of the opportunities and seek new ways to exploit them. Just the simple fact that people are able to make a phone call or send a text message anywhere at any time has changed the conditions for marketing in general. Many marketing campaigns are designed to trigger a response in the form of a voice call, SMS/MMS or a visit to a mobile website. Handsets are also a suitable platform for building brand awareness through the distribution of free content or applications. Mobile advertising is yet another channel that evolves along with mobile Internet access.

As the advertising and marketing industry acquires more and more experience of the mobile channel it will become a natural part of the integrated marketing media mix. As digital media converge there will however be less distinction between mobile and traditional Internet advertising. Digital campaigns will be designed to reach out to consumers on a broad range of platforms, including everything from full-size PCs to smartphones.

Berg Insight estimates that the total value of the global mobile marketing and advertising market was € 1,014 million in 2008. Asia-Pacific constituted the main regional market, accounting for around 75 percent of the total value. Despite the shrinking advertising market, the mobile channel has grown over the past year underpinned by increasing mobile media usage. Growing at a compound annual growth rate of 43 percent, the market will be worth € 8.7 billion in 2014 – corresponding to 11.7 percent of the total digital advertising market.

The mobile marketing and advertising ecosystem is highly fragmented and complex, which is typical for an immature industry. Many companies try to find their place in the value chain and get a piece of the market. Much of the activities carried out are still on an experimental stage and actors are constantly looking for new business models and services that could generate revenues. However, many large brands have launched numerous campaigns and are now moving beyond the trial stage to establish the mobile channel to be part of the media mix. Campaigns are getting increasingly complex and more integrated into larger campaigns, spanning several media formats. Most firms specialized in enabling mobile advertising are still relatively small, venture capital funded actors. Many larger players are taking a relatively cautious stance with the exception of a few companies such as Vodafone, Yahoo! and Google. Over the past three years a number of the larger players have acquired firms specialized in mobile advertising. The largest deal to date was Google’s US$ 750 million acquisition of AdMob in November 2009.

Many mobile operators have actively engaged in mobile advertising activities in some form. The level of activity, however, varies vastly between different operators. Turkcell is one of the most aggressive promoters of mobile advertising since Blyk discontinued its MVNO business. Vodafone offers a wide range of services across the globe, some commercially available while others are of an experimental character. Besides the operators, both Nokia and Ericsson have launched various services to accelerate the mobile advertising developments.

This report answers the following questions:

- How can mobile handsets become integrated in the marketing media mix?
- What changes in the mobile industry and end-user behaviour are required before mobile advertising can become a multi-billion euro market?
- How are Google, Microsoft, Nokia and Yahoo! positioning themselves to become leading mobile advertising networks?
- Who are the rising stars that stand out from the crowd among the mobile advertising and marketing companies?
- How well suited for advertising are different existing and future mobile media channels?
- What are the initial experiences from mobile marketing campaigns?
- Which advertising formats will become most successful in the mobile environment?
- In what ways can location technology improve the relevancy of mobile advertising?
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