IAB Global Mobile Anthology:
Worldwide Perspectives on Mobile Media

A Report Prepared by the IAB Mobile Marketing Center of Excellence

Released April 3, 2012

Introduction

The US Interactive Advertising Bureau's Mobile Marketing Center of Excellence was established in December 2010 to unify, lead, educate, and evangelize mobile interactive services. With the agreement of the Mobile Center's Board of Directors, we have concentrated our projects around key industry priorities in 2011, including:

- Encouraging better ad formats and creative;
- Improving operations and the supply chain;
- Harmonizing measurement;
- Avoiding adverse regulation; and
- Educating marketers and agencies.

Importantly, the Center has also worked to build and maintain relationships with other Interactive Advertising Bureaus around the world, helping to coordinate our efforts around mobile.[1] An important accomplishment on this front is the establishment of the Mobile Committee-Global, a forum for mobile staffers at the international network of IABs to come together on a monthly basis to keep one another informed of projects and market developments. This new inter-IAB committee will help ensure that while the worldwide IABs retain the independence to respond flexibly to local market conditions, we will also closely coordinate where needed to avoid duplication of efforts and ensure consistency in our approaches to major issues.

This document, comprised of submissions from a dozen IABs around the world, represents a first ever IAB global mobile perspective. Mobile interactivity is developing differently in different countries. It also drew on findings included in IAB Europe's *Mobile Media White Paper, Issue 1*, published in March 2011. For some IAB's mobile is not yet a priority; however, for many it is a topic of increasing focus, attention, and excitement.

We have organized this document into regional sections. Representation in each is as follows:

Americas:

- Argentina
- Brazil
- Canada
- Mexico
- United States

Europe:

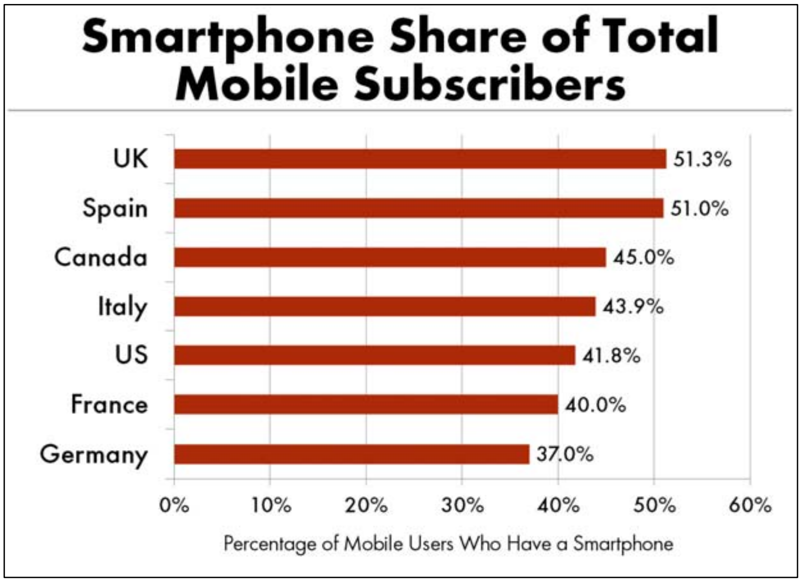
- Belgium
- Denmark
- Finland
- France
- Germany
- Italy
- Spain
- Sweden
- United Kingdom

Asia/Pacific:

- Australia
- China
- New Zealand

[1] For more on the global IABs, see: http://www.iab.net/about_the_iab/global_iabs

Summary Observations



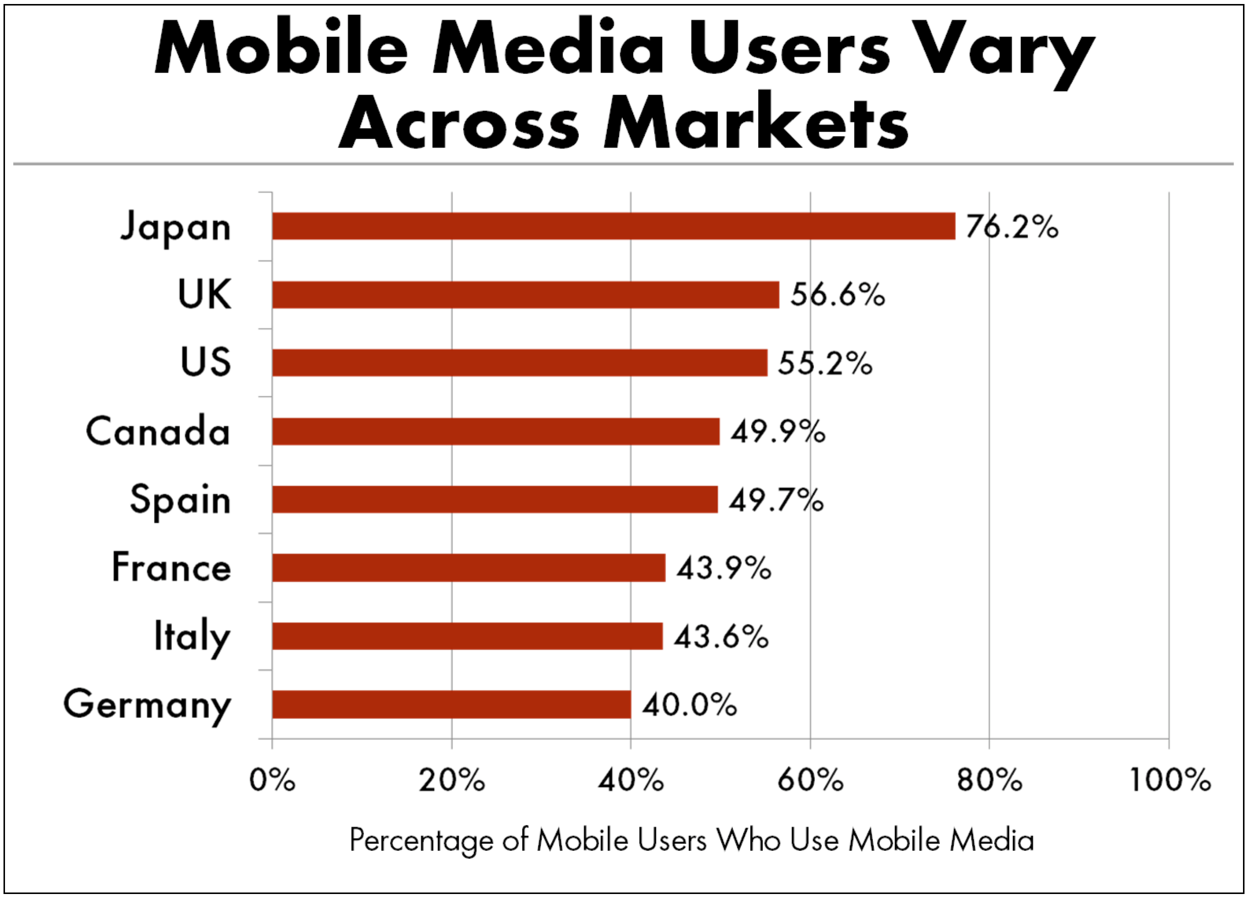
Source: comScore MobiLens, 3 mon. avg. ending Dec 2011.

One clear conclusion from this global mobile overview is just how diverse the mobile landscape is from country to country. In terms of consumer adoption, device/OS market share, and local IAB priority, mobile varies widely from country to country. Countries like Denmark, where mobile ad spend is relatively low and mobile therefore is not yet an important advertising priority, lie at one extreme, while countries like Canada, Mexico, the UK and the US already see significant advertiser interest in mobile media. All of the IAB's that participated in this anthology are devoting increasing resources to promoting mobile media.

Another clear conclusion is that when it comes to advanced mobile media and internet use, the US is on a par with many other developed countries. In the early days of mobile the US, with its lagging and fragmented mobile network technologies, clearly lagged behind most European countries in terms of mobile penetration and usage. Times have changed. A recent comScore report[2] shows that smartphone penetration of the mobile audience in the US compares favorably to smartphone adoption in the five largest EU countries.

When it comes to mobile internet/media usage, too, adoption in the US compares very favorably to many other countries. While over three quarters of mobile consumers in Japan use mobile media, Japan and South Korea will likely always be outliers in terms of mobile data. US mobile media usage compares favorably with the UK, however, and exceeds usage in Canada and the other four largest European Union countries.

[2] comScore, *2012 Mobile Future in Focus: Key Insights from 2011 and What They Mean for the Coming Year*, Released February 2012.



Source: comScore MobiLens, 3 mon. avg. ending Dec 2011.

Finally in terms of the adoption of specific mobile activities, too, US consumers don't text as much as Europeans, and they don't e-mail as much as Japanese consumers do. However, for many other mobile data activities, Americans are just as likely, if not even more likely, to do them, as their fellows around the globe.

Selected Mobile Activities by Share of Mobile Audience

	U.S.	EU5	Canada	Japan
Sent text message	74.3%	84.4%	69.2%	44.4%
Took photos	60.3%	59.8%	55.1%	63.9%
Used email	40.8%	30.0%	35.9%	57.3%
Accessed social networking/blog	35.3%	25.7%	31.2%	19.6%
Accessed weather	35.2%	23.2%	29.8%	35.1%
Played games	31.4%	27.5%	30.8%	15.3%
Accessed search	29.5%	20.4%	25.6%	30.8%
Accessed maps	26.5%	18.2%	21.6%	19.4%
Accessed news	25.5%	20.0%	20.1%	24.3%
Listened to music	23.8%	27.4%	23.0%	13.3%
Accessed sports info	21.8%	16.5%	16.0%	19.7%
Accessed financial news or stock quotes	15.1%	11.3%	11.4%	17.9%
Accessed online retail	12.2%	8.2%	6.1%	10.0%

Source: comScore MobiLens, 3 mon. avg. ending Dec 2011

ARGENTINA

Mobile Ad Revenue (2010):	N/A
Main mobile operators:	4: Claro (36%), Movistar (31%), Personal (31%), Nextel (2%)[3]
Mobile network technologies:	5: Android (33%), iOS (27%), Symbian (11.2), Rim (3.8%), Others (24.4)
Mobile voice subscribers:	52.000.000 (27% pre-paid), estimated active: 37.000.000[4]
Mobile data users:	More than 7.000.000, with 5.000.000 of them with data service.[5]
Does your IAB have a mobile committee/council/ group?	Not yet.

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

- Value Added Services (37%) vs. Voice (63%)
- VAS split: SMS + MMS: 68%, Data: 15%, others: 17%
- Usage: SMS: 97%, MMS: 17%, IM: 11%, Voice Mail: 48%, Email: 14%, Mobile Web: 19%, Social Networks: 15%

What do you think will be the biggest mobile trends or developments in your country in 2012?

100% Rich Media

What plans do you as an IAB have for mobile for 2012?

Since we have some Mobile members, we are planning to develop a specific committee to gather info, useful insights, generate revenue reports & so forth.

[3] Source: Other
[4] Sources: e-marketer, Monitor Acisiòn de Vas, Convergencia ARG, March 2011
[5] Sources: e-marketer, Monitor Acisiòn de Vas, Convergencia ARG, March 2011

BRAZIL

Mobile Ad Revenue (2011):	$23.8M[6]
Main mobile operators:	Claro, Vivo, TIM
Mobile network technologies:	EDGE, 3G
Mobile voice subscribers:	232M subscriptions (>100% penetration)[7]
Mobile data users:	33.2M (17% of population)[8]
Does your IAB have a mobile committee/council/ group?	Yes

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

For many years, Mobile advertising in Brazil was primarily focused on Messaging (SMS/MMS). This is still a strong medium in Brazil, but in 2011 the rise of high-end Mobile operating systems like iOS and Android caused many advertisers to take note of Mobile Display and Mobile Search and begin including them in more of their media plans. This trend was reinforced by the strides made by key publishers like UOL to develop strong content for mobile devices and attract larger audiences. Currently, the Mobile market is primarily led by Display, followed by Search and Messaging.

What do you think will be the biggest mobile trends or developments in your country in 2012?

2012 is the year that Mobile will truly explode in Brazil. Within the past 18 months, all three major carriers have reduced their data plan prices. Critically, they also introduced pre-pay Mobile data plans, which make it cheaper to use the internet through a phone than by going to an internet café – which is where millions of middle-class Brazilians currently use the internet. As consumer awareness of Mobile data plans increases and devices continue to become cheaper and more powerful, those millions of Brazilians will now become Mobile internet users.

We are currently at about 17% mobile internet penetration and primed to see an explosion in 2012. Of course as this audience grows, we expect marketers to increasingly value Mobile as a critical medium for reaching consumers.

What plans do you as an IAB have for mobile for 2012?

- Release a website to educate Brazilian marketers on the importance of Mobile web sites and how to create one

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[6] eMarketer, April 2011
[7] eMarketer, April 2011
[8] Anatel, December 2011

- Conduct a full-scale research project to understand the profile of smartphone users in Brazil – their demographics, usage habits, etc. Release results through an event designed to generate marketer awareness of the growth of Mobile in Brazil.
- Gather and maintain the most up-to-date Mobile market data in a package that can easily be distributed in the market
- Create a Mobile best practice guide for marketers new to the medium
- Publish editorials educating the market about the growth of Mobile and how to take advantage of it

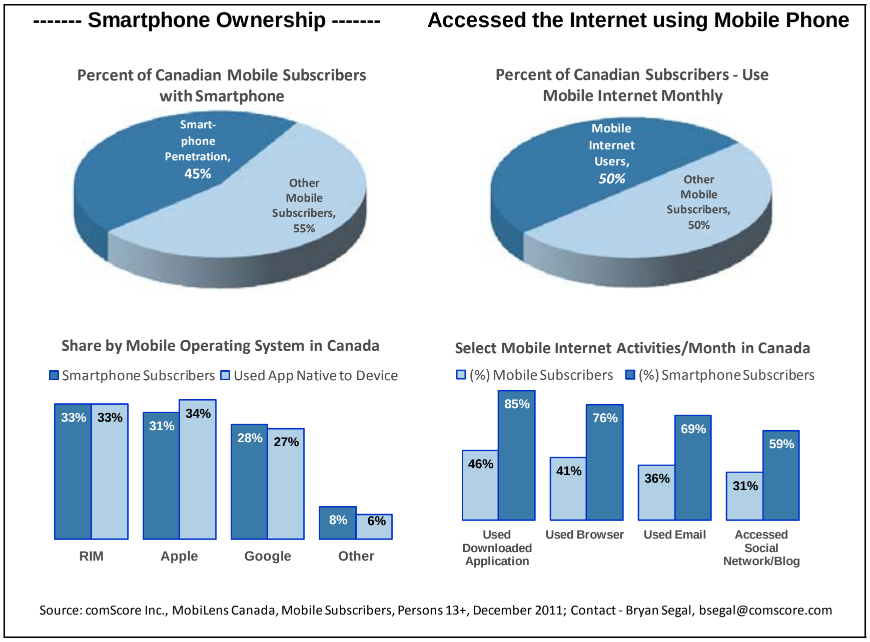
CANADA

Mobile Ad Revenue (2010):	$46.6 Million ($Can)
Main mobile operators:	Rogers Wireless, Bell Wireless Affiliates, Telus Mobility
Mobile network technologies:	GSM, CDMA, HSPA, LTE
Mobile voice subscribers:	83% of population (45% smartphones)
Mobile data users:	50% of mobile users
Does your IAB have a mobile committee/council/ group?	IAB Canada Mobile Council

What is the general state of mobile advertising/marketing in your country?

In 2010, Canadian Mobile Ad Placement revenue grew at a rate of 105% year-over-year, driven primarily by Search and Mobile Display/Sponsorship. Almost 85% of Canadians are cell phone subscribers and 45% of the latter have Smartphones. Half (50%) of Canada's Mobile subscribers are monthly Internet users, dominated by the 18-44 age group. Four top, monthly Internet activities are using downloaded apps (85% of Smartphone subscribers), browsing (76%), emailing and accessing social networks/blogs. The most accessed Mobile Internet Content on a weekly basis is weather (18% of Mobile Internet users), followed by maps, news, sports and entertainment news. RIM is the leading Mobile operating system in Canada (33% of Smartphone subscribers), followed closely by Apple (31%) and Google (28%). Tablet penetration has risen to 10% among adults and is highest among males (12%) and the 35-49 age group (14%). Canadian Mobile marketers believe that rapid Smartphone adoption is stimulating more Advertising Agencies to actively consider Mobile in their media plans.

Mobile in Canada Highlights



Relatively speaking how important are each of the following ad format types: messaging (SMS or MMS); mobile display/sponsorship; mobile search?

Mobile Ad Placement Revenue in Canada

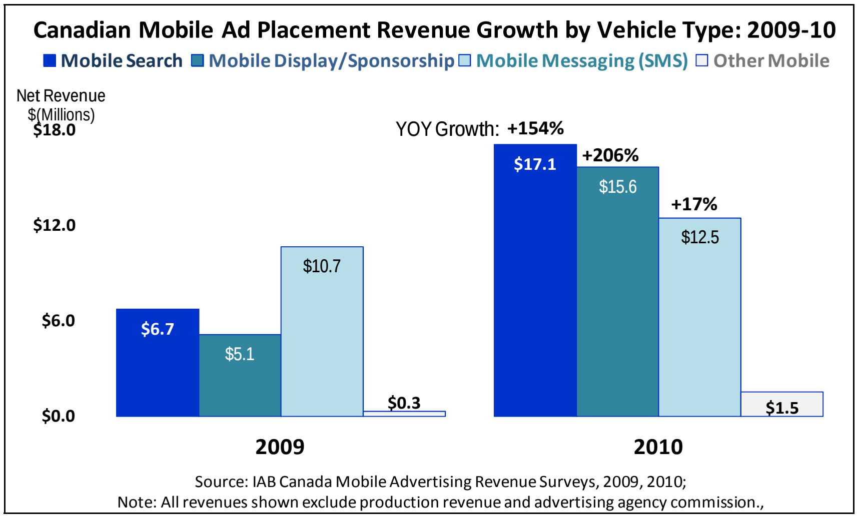
Mobile Ad Placement/Spend grew by 105% in 2010 to $46.6 Million ($Can), driven primarily by Mobile Search with $17.1 million (up 154%) and Mobile Display/Sponsorship with $15.6 million (up 206%). Mobile Messaging, the third largest Ad Placement component, grew by 17% to $12.5 million.

	Canadian Mobile Ad Revenue		
	2009 $ (millions)	**2010** $ (millions)	percent increase
Total	**$22.8**	**$46.6**	**105%**

Source: IAB Canada –Mobile Advtg Revenue Surveys.
Note: Revenues exclude production/agency commission.

Note: Conversion Factor, $1.00 CAN = $0.971 USD [9]

[9] Source: Bank of Canada, 2010



What do you think will be the biggest mobile trends or developments in your country in 2012?

Canadian Challenges + Opportunities for Mobile in 2012[10]

Rapid Smartphone adoption by consumers will continue to raise the profile of Mobile as an advertising medium, stimulating more Agencies to actively consider Mobile in their media plans during 2012. A key challenge is the need to grow Mobile's credibility as a proven advertising medium, requiring concerted action on the following key fronts:

- access to better Mobile reporting of both currency and campaign metrics, as well as analytics;
- resolving the lack of local market audience data, for better campaign targeting; and
- demonstrating Mobile's effectiveness and value to Advertisers/media buyers, by conducting more campaign return-on-investment studies.

More resources must also be dedicated towards educating Advertisers on Mobile planning and buying basics and campaign best practices. A perceived lack of standardized advertising units/specifications has been held back by intensified Mobile device/audience fragmentation across a growing number of different platforms. The rapid evolution of Mobile, coupled with growing competition from significant new Mobile entrants has ratcheted-up pressure on existing Online and offline media owners to build and improve Mobile platforms, source and develop Mobile Website content and Applications and Social Media integration, while investing in the internal capabilities needed to engage Mobile Advertisers. Canadian Mobile marketers see opportunities for revenue growth for 2012 in Mobile Search, Rich Media, Video and quality in-App inventory.

What plans do you as an IAB have for mobile for 2012?

- Continued and expanded delivery of our leading-edge **Mobile Marketing Course** to both English and French markets in Canada
- Continued and expanded delivery of our **Mobile Ad Revenue Survey**, including Tablet ad revenue
- **Coordinating Rich Media + Other Standards** with the US and other Global Partners

[10] Source: IAB Canada 2010 Mobile Advertising Revenue Survey

- Partnering with IAB Canada Members to do **NEW! Cross-Media Mobile Research**
- Driving awareness of Mobile capabilities with **Mobile-Central Events**

Data Contributors/Sources

IAB Canada

- First commissioned by IAB Canada in 2007, the **Canadian Mobile Advertising Revenue Report** is considered the most accurate measurement of Canadian Mobile advertising revenues. The Survey utilizes data received directly from Canada's leading Mobile Carriers, Mobile Aggregators, Mobile Marketing companies, Online Publishers offering Mobile advertising solutions (including Mobile Search advertising), Mobile Application Developers and Mobile Advertising Networks. IAB Canada retains Ernst & Young to jointly establish, maintain and continuously update comprehensive Survey standards for measuring the growth of Online and Mobile advertising revenues in Canada. Results of individual respondent submissions are held in strict confidence by Ernst & Young and are released in aggregate form only. Contact: Steve Rosenblum (srosenblum@iabcanada.com).

comScore Canada

- comScore MobiLens™ provides an unparalleled view of the Canadian Mobile media landscape, connecting data on mobile consumer behaviour and device capabilities to help you reach and engage consumers. Survey – December 2011; Base - Persons 13+. Contact: Bryan Segal (bsegal@comscore.com).

CWTA

- The Canadian Wireless Telecommunications Association (CWTA) is the authority on wireless issues, developments and trends in Canada. It represents cellular, PCS, messaging, mobile radio, fixed wireless and mobile satellite carriers as well as companies that develop and produce products and services for the industry. Survey - Q3' 2011; Base – Wireless Subscribers (www.cwta.ca).

MTM (sourced for Tablet data)

- The Media Technology Monitor is among Canada's highest-quality media surveys. It employs large sample sizes and achieves response rates far exceeding industry standards. The MTM is a product of CBC/Radio-Canada Research and Strategic Analysis. The MTM measures Canadians' media technology adoption and use at two points in time, in the fall and the spring. Survey - Fall 2011; Base – Adults 18+; Contact: Mark Allen (mark.allen@cbc.ca).

MEXICO

Mobile Ad Revenue (2010):	We have not measured this yet however we are working on a Mobile Adspend study to measure 2011. The questionnaire will be sent out late January, 2012 with results by April.
Main mobile operators:	Telcel, Movistar, Nextel, Iusacel, Unefon
Mobile network technologies:	3G, 3.5G, 4G, GSM, CDMA
Mobile voice subscribers:	92 – 93 million[11]
Mobile data users:	25 million[12]
Does your IAB have a mobile committee/council/ group?	Yes we have a Mobile Committee that meets once a month with a president and vice president who work together with IAB team members (Jorge and Saskia) to organize research, education and best practice initiatives

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

Mobile Marketing in Mexico

Mobile Market Growth in Mexico has been a resounding success story where the participation of the industry and implementation of regulatory conditions have allowed the mobile service to reach the vast majority of Mexicans. Initially considered a luxury, the cell phone provided 80% of telephone lines in 2011 in Mexico.

There are approximately 100 million mobile lines in Mexico, which are consumer owned (mostly the youth segment regardless of income level), rather than institution owned (companies, government). The Competitive Intelligence Unit reports a penetration of 87% among the 16-20 year old age group, compared with 50% of 51-60 year olds.
Even when, in mid-2009, all the world economies went into recession and the global market for mobile devices faced a contraction of 10%, (according to IDC), the smartphone segment had a healthy growth rate of 15%.

The number of mobile phone users in 2011 was 59.1 million which is 52% of the population, this is forecast to grow to 63.2 million users (55% penetration) in 2012. Between 2010 and 2011 the penetration of mobile phone users grew 7%) thus demonstrating the rapid growth rates of mobile in Mexico. By 2015, the numbers forecast are 75.4 million (63.5% penetration (eMarketer).

Mobile SMS
SMS is large part of Mobile marketing in Mexico due to the number of feature phones still prevailing. Many who have smartphones may not necessarily have Internet connection as prepaid is very popular.

[11] Sources: Terra, Cofetel, eMarketer, comScore
[12] Sources: Terra, Cofetel, eMarketer, comScore

Mobile Web
There are on average 25 million users navigating on Mobile devices in Mexico (mostly through WiFi), which amounts to approximateley 25-26% of the population.

Mobile apps
Mobile apps (display / textlink) are a big market in Mexico although the majority of apps that are downloaded are not used (average 3-4 apps are used).

Mobile search
Mobile search has grown considerably in Mexico. During a week in 8/31/2010 - week of 8/30/2011 there were +70 million weekly queries in Mexico and 4 x growth (Internal Google data). 10% of mobile search is on a mobile device (Internal Google Mexico) although it has not been commercialized yet.

Mobile video
Due to the limited operator broadband, reproducing mobile video of high quality is of medium importance and is not particularly developed yet. However the growth of smartphones motivates the use of mobile video.

What do you think will be the biggest mobile trends or developments in your country in 2012?

- Growth of feature phones and smartphones, currently the penetration of Smartphone users in Mexico is 12-13%
- More internet navigation on mobile devices
- Growth of data plans from operators
- Variety of formats on mobile devices e.g. rich media
- New segmentation tools so that brands can better reach their target market

What plans do you as an IAB have for mobile for 2012?

Research:

We are undertaking 2 new mobile studies in 2012:

The Mobile Adspend study is a very important measurement of the size of the mobile industry. Albeit small, it will continue to grow so it is vital to start measuring it as soon as possible.

The Mobile Consumption Study will explore the mobile usage, perception and habits of mobile users (those who have internet connection as well as those who do not) in Mexico. This will be a first public study of its kind.

Education and Events:

We have 8 hour training days called Digital Days for which there exists a Mobile Digital Day and the contents are regularly reviewed. Part of the IAB Diploma in Interactive Marketing consists of a module on Mobile marketing. We are staring an educational initative with UTalk which one of the training days will be mobile.

We are planning to hold a Mobile Conference for the first time in 2012 with international keynote speakers called the Mobile Innovation Day.

Best practices

2012 will see the launch of our first Mobile Marketing handbook which gives an overview of the Mobile Marketing Ecosystem, channels, services, opportunities and barriers and case studies of the Mexican mobile market.

UNITED STATES OF AMERICA

Mobile Ad Revenue (2010):	US$550M-$650M[13]
Main mobile operators:	Verizon, AT&T Wireless, Sprint, T-Mobile
Mobile network technologies:	CDMA, UMTS, LTE
Mobile voice subscribers:	322.8M[14]
Mobile data users:	77.9m (2010), 97.3m (2011)[15]
Does your IAB have a mobile committee/council/ group?	In December, 2010, the US IAB launched the Mobile Marketing Center of Excellence, a separately funded unit within the IAB (with its own membership dues) to expand our mobile capabilities. Additionally we have a Mobile Advertising Committee and as of Jan. 2012 a Tablet Advertising Committee, which are open to any IAB member company.

2011 in Review

The US IAB's Mobile Center focused its 2011 efforts on projects related to ad formats and creative, operations and supply chain, measurement, regulation, and education. We are pleased with our accomplishments against all of these key industry priorities. What follows is a select list of some of the IAB's projects from the previous year.

[13] Source: IAB Internet Ad Revenue Report, 2011
[14] Source: As of June 2011: CTIA, http://ctia.org/media/industry_info/index.cfm/AID/10323
[15] Source: eMarketer, August 2011, http://www.emarketer.com/Article.aspx?R=1008553

Creative and Ad Formats

- Closed out the submissions period for Mobile Rising Stars, an ecosystem-wide competition to establish innovative, exciting new standard creative formats for smartphone and tablet advertising. Mobile Rising Stars Finalists will be announced at the 2012 IAB Annual Leadership Meeting.

Operations

- Released the final version of Mobile Rich-media Ad Interface Definitions (MRAID), version 1.0. MRAID creates a common API for mobile rich media ads to communicate with mobile apps, which will greatly simply life for creative developers working on mobile rich media ads. By reducing the costs and friction involved in creating such campaigns, it will have a marked impact on the growth of the mobile advertising market. The Mobile Center also launched a project to design MRAID 2.0, extending and building on the vital foundation of MRAID 1.0.

Measurement

- Released a briefing paper on the *State of Mobile Ad Measurement*, an overview of the challenges, both technical and operational, of measurement in the mobile arena.
- Continued to work on Mobile In App Ad Measurement Guidelines, with the MMA and MRC, a project that is taking into account the five key principles established by the IAB's larger

Making Measurement Make Sense initiative. The IAB expects to release these guidelines in mid-2012.

Regulation and Public Policy

- Continued the Mobile Center's work on a mobile code of conduct, together with the DAA and several other associations including the 4A's, DMA, and ANA.

Education

- Released the findings of Ovum's research project, *Marketer Perceptions of Mobile Advertising*, a survey of 300 US marketer decisionmakers spending some of their budgets on mobile advertising today. This study highlights key areas where marketers are pleased with mobile today, and also validates the priorities the Mobile Center has set as key issues to ensure mobile's further growth.
- Released a first *Tablet Buyers Guide*, offering concrete advice to media planners and creative designers on maximizing tablet advertising opportunities today. Also held an event in the IAB Ad Lab that reviewed the major findings in the Guide, as well as offered firsthand perspective from agency and media companies on tablet advertising today.

What plans do you as an IAB have for mobile for 2012?

We believe that 2012 will continue to see robust growth of mobile advertising. As of January 2012, 40% of American adults have a smartphone, and 15% own a tablet, and these audiences will only grow as more and cheaper devices hit the market. However, key challenges remain. The industry will see even greater fragmentation, across different networks, devices, operating systems, screen sizes, and user interfaces, leading to challenges for both media companies and marketers looking to deliver content, applications, and services to the mobile audience. And regulatory scrutiny of mobile services will only increase as well—it's imperative that the industry stay on the right side of consumer privacy issues, and the US IAB expects to play a leading role there. The other thing to expect in mobile is, of course, the unexpected. It's impossible to identify the next great trend in mobile—the market is too young and dynamic. But that's what makes it so exciting, and it's one of the things that makes the industry-wide conversations that the IAB fosters so valuable.

BELGIUM

Mobile voice subscribers:	8,091,000[16]
Mobile data users:	1,396,000[17]

Mobile internet penetration is still modest in Belgium, representing 17% of mobile subscribers aged 16+. The Belgium mobile internet user profile is quite balanced and mirrors the national population. This clearly shows some signs of maturity in terms of usage, although m-commerce and mobile advertising are still in their early days.

The primary mobile internet activity in Belgium is email, followed by social networking, browsing and video. Only 13% of Belgian mobile internet users have used the medium to find information on products, services, or brands, suggesting that mobile has a way to go before becoming a major shopping and advertising medium.[18]

DENMARK

Mobile Ad Revenue (2010):	4.7 mio. €[19]
Main mobile operators:	TDC, Telenor, Telia, 3
Mobile network technologies:	3G
Mobile voice subscribers:	5 million (95 % of pop.)[20]
Mobile data users:	2.5 million[21]
Does your IAB have a mobile committee/council/ group?	No

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

- messaging (SMS or MMS): not important regarding advertising
- mobile web: not important regarding advertising
- mobile app: not important regarding advertising
- mobile search: not important regarding advertising
- mobile video: not important regarding advertising

[16] *EIAA Mediascope Europe 2010, base: 16+*
[17] *EIAA Mediascope Europe 2010, base: 16+*
[18] *Mobile Media: An IAB Europe White Paper. Issue 1: Consumer Insights Across Europe.* Published March 2011
[19] Sources: FDIM, IAB revenue study
[20] Source: Ministry of IT
[21] Source: Ministry of IT

What do you think will be the biggest mobile trends or developments in your country in 2012?

- More apps and mobile sites from media
- Increase in use
- Slight increase in advertising

What plans do you as an IAB have for mobile for 2012?

- Establishment of an Mobile Group / subcommittee
- Mobile seminars
- Mobile measurements

FINLAND

Mobile Ad Revenue (2010):	9.1 million euros (growth 49% from 2009)[22]
Main mobile operators:	TeliaSonera, Elisa, DNA
Mobile network technologies:	2G, 3G/HSDPA, 3.5G/HSDPA+, 4G/LTE under trial & testing
Mobile voice subscribers:	Approximately 8.9 million[23]
Mobile data users:	N/A
Does your IAB have a mobile committee/council/ group?	We have a workgroup of over 10+ active mobile marketing professionals and 20+ on our e-mail list, there is a fast-growing interest in our operations

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

In regards of revenue, SMS is still number one. In regards of growth mobile apps is leading the way and the most developing area is the mobile web.

Since end of summer 2011, mobile data usage has doubled. Largest medias are having over 300 000 unique visitors in their services weekly. Advertisers interest has been slowly picking up.

[22] Sources: Finnish Advertising Council, http://www.mainonnanneuvottelukunta.fi/6
[23] Sources: Operational Statistics from yearly reports of TeliaSonera, Elisa & DNA

What do you think will be the biggest mobile trends or developments in your country in 2012?

Penetration – over 80% of new mobile phones are smartphones. This will change the scene quickly. Roughly half of the phones are iOS and with Android overcoming Symbian, Windows Phones will be much used in the corporate world. Mobile advertising could get a boost from the B2B perspective.

What plans do you as an IAB have for mobile for 2012?

Our first priority is standardization. We are soon finishing it with "traditional" ad formats and moving into rich media after that. Our workgroup also has goals to increase general awareness and to make it easier for advertisers to get into the mobile world. We think mobile should be more of a default than a separate subject.

FRANCE

Mobile voice subscribers:	47,000,000[24]
Mobile data users (if known):	14,775,000[25]

France's internet penetration is in line with other western European markets, at 28 percent of mobile users, making it one of Europe's largest markets with almost 15 million users. Mobile internet in France represents almost a third of mobile subscribers, making mobile a media in its own right. There is a 60:40 male:female split and is evenly distributed across the age groups, with 13 percent of users being over 55. The mobile internet function most frequently accessed in France is the weather, followed by news, maps, sports, and entertainment news.

GERMANY

Mobile voice subscribers:	53,000,000[26]
Mobile data users (if known):	16,077,000[27]

At 20 percent, Germany's mobile internet penetration level is slightly lower than the other western European countries. However, Germany still has Europe's second largest mobile internet population with 16 million adults, and the penetration of mobile Internet increased by 33 percent from 2009 to 2010.[28]

Mobile internet is still a male phenomenon, with 37 percent of mobile internet users being female. Mobile internet use has a strong hold in the 35-54 age group. However, as with the other 'Big 5' markets, the under

[24] Comscore Mobilens 3 months average ended July 2010, base: 13+
[25] Comscore Mobilens 3 months average ended July 2010 / 2009 base: mobile users 13+
[26] Comscore Mobilens 3 months average ended July 2010, base: 13+
[27] Comscore Mobilens 3 months average ended July 2010 / 2009 base: mobile users 13+
[28] All Germany stats cited here from: *Mobile Media: An IAB Europe White Paper. Issue 1: Consumer Insights Across Europe.* Published March 2011

25 age group accounts for a large share of the mobile internet users. Most German users access the internet through a browser on their phone (70 percent), and many have paid for goods and services using mobile internet.

Over one third of German mobile internet users say they have already received an SMS ad on their phone. And ten percent said that they have used their mobiles to find information on products or brands in the last week.

ITALY

Mobile voice subscribers:	47,000,000[29]
Mobile data users (if known):	15,826,000[30]

Italy has a high mobile internet penetration, with 26 percent of the population using internet via mobile, making one of the largest markets with nearly 16 million users. The users in Italy are on average slightly older than in many other markets, with 53 percent of users being over 35. Italian users are the most likely in western Europe to have used the internet on their mobile to pay for goods or services..[31]

The chief mobile internet activity in Italy is browsing, followed by e-mail, social networking and video. Browsing displays the biggest yearly growth.

Five out of ten Italian mobile internet users say they have already received an SMS ad on their phone. 14 percent said that they have used their mobiles to find information on products or brands in the last week.

SPAIN

Mobile voice subscribers:	35,000,000[32]
Mobile data users:	11,949,000[33]

What do you think will be the biggest mobile trends or developments in your country in 2012?

The Spanish IAB recently released its top 10 mobile marketing trends for 2012.[34] Key mobile priorities for this year are:

[29] Comscore Mobilens 3 months average ended July 2010, base: 13+

[30] Comscore Mobilens 3 months average ended July 2010 / 2009 base: mobile users 13+

[31] All Germany stats cited here from: *Mobile Media: An IAB Europe White Paper. Issue 1: Consumer Insights Across Europe.* Published March 2011

[32] Comscore Mobilens 3 months average ended July 2010, base: 13+

[33] Comscore Mobilens 3 months average ended July 2010, base: 13+

[34] This report was made by IAB (Spain) Mobile Commisson (AdTriple, Comscore, Elogia, Lumata, Microsoft, Mobiledreams, Nielsen, On and Off, Pocketwidget, PRISA Digital, Razorfish, Scanbuy, TAPTAP, Telefónica, Unkasoft, Via

Top 1: Digital Convergence
Users become multi-device, they access to different services regardless of the terminal. More than web or mobile, they are beginning to speak of a single digital marketplace.

Top 2: Mobile Measurement
After many years of fragmentation of data by multiple market players, it is start to take the first steps to unify criteria, in part because of digital convergence. Comscore will measure mobile Internet audience, while apps are already beginning to standardize tracking metrics that provide credibility.

Top 3: Mobile Advertising
The online investment, with convergence and audience measurement, force also invest in mobile. The proposal will see advertising is enriched by geo-location, payment gateways and customization that allows the phone.

Top 4: Geo-Location & AR
Geolocation can play with the user's exact location and further customize communications. Augmented Reality will add extra layers of information to what we envision. The interactivity comes to a new level.

Top 5: Mobile Payment
If there is a unique feature on the mobile device that makes it better suited for electronic commerce, is the existence of different payment gateways that are integrated and fast. It is a feature that can be implemented on virtually any mobile strategy and play with the impulsiveness of the user. The operator itself can revitalize its role in the market if it can adapt to the "Revenue share" from other alternative platforms.

Top 6: NFC
Synonym to use the phone as a credit card when it physically contact with a specific reader. Expectations are high and the market assumes to be a revolution, but require the user to acquire new specific terminals, leaving the mystery of what % of the market will be compatible with NFC at the end of the year.

Top 7: BIDI (QR)
9 out of 10 users would enter the site of a brand that they are interested when they see it advertised on the street. Force users to type an address in the mobile browser means losing many along the way. The BIDI is easy, fast, intuitive, simple and interactive, known by 64% of mobile users.

Top 8: Apps integrated in the digital strategy
The apps should be part of a brand's digital strategy, being a foot longer, an extra window in touch with your customers. Develop independent apps, isolated from digital strategy, as a fad or toy brand, give irrelevant results. Only 11% of the apps are downloaded from advertising, compared to 67% from magazines or websites, which indicates that there is room for improvement.

Top 9: Contents, new business models

Channel, Yahoo & Yoc).

Classical model based on pay per download is falling as long as new business models are arriving. The user's consumption pattern has changed because of streaming, free content supported by advertising, digital convergence, social media or P2P, to give some examples. New business models are arriving, and will arrive during this year. To be followed carefully.

Top 10: Privacy
The advancement of new technologies, digital convergence, the concentration of digital actors and the questionable ethics of certain services (subscriptions disguised as downloads, premium subscriptions to sweepstakes, etc.) can give a negative view on the future of user privacy . However, the rise of advertising as an economic engine for mobile services is forcing transparency than ever had been.

What plans do you as an IAB have for mobile for 2012?

- February: Mobile Measurement in Spain
- March: Who is Who in Mobile Marketing Spain. A guide with 400 companies to help the market to dynamic business. It will be in printed version distributed by an advertsing magazine & in pdf, iphone

SWEDEN

Mobile Ad Revenue (2010):	€6.6m[35]
Main mobile operators:	Telia, Tre, Tele2 & Telenor
Mobile voice subscribers:	97%[36]
Mobile data users:	~55%[37]
Does your IAB have a mobile committee/council/ group?	We do have a Mobile Task Force. Efforts are now being done to establish and Advisory Board to secure earmarked budgets.

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

- During 2011 mobile definitely passed it's the tipping point in Sweden. By the end of the year Smartphone penetration had reached above 50% and 9 out of 10 new phones sold in stores are now Smartphones. 1,2 million Swedes are daily browsing the mobile web, 40% are browsing weekly, and mobile advertising and production revenues increased with 170 % in 2011. In addition the app market exploded - and Sweden is today one of the markets launching most new apps per capita. QR also reached the Swedish billboards and magazines in the end of 2011.

[35] ADEX 2012
[36] IIS: http://www.iis.se/docs/SOI2011.pdf
[37] Mediavision & Google

- Google Sweden says mobile search is increasing and approximately 50% of all mobile browsing session starts with a search.
- Mobile video has also increased over the last year and it's not rare anymore to follow sport events and series in your mobile. TV4, the biggest commercial TV channel in the country is soon launching a 24hrs live mobile channel broadcasting Big Brother and News initially.
- Messaging is still an important bearer of all type of dialogue/CRM based mobile marketing. Though we see that mobile sites embedded in the sms's are taking over for MMS to deliver rich media.

What do you think will be the biggest mobile trends or developments in your country in 2012?

Media houses will capitalize on increased mobile traffic

Aftonbladet, one of the biggest Swedish newspapers experienced recently mobile surpassing fixed web traffic on their site. They also expect mobile to surpass the paper version in unique users/buyers this year. We will see the big media players focusing their efforts to capitalize on the enormous increase in mobile browsing. New ad formats will be tested and hopefully we will see better methods for measuring this year.

HTML5 will be the leading technology when companies are establishing mobile presence

Swedish study says 67% of consumers will expect companies to have a mobile tailored site. Number of Swedish companies having a decent mobile presence (apps or site) is still very low. As companies around will discover the significant increase in users coming from small screen to their "www – sites" - a lot of new companies will "go mobile" in 2012.

The universal trend indicates that HTML5 will in more cases be the chosen technology when companies want to establish its mobile presence. SVT (Swedish Public Service TV) has already moved in this direction and more will follow. Nevertheless we believe that even the app market will continue to grow substantially in 2012.

Bricks & Mortar under pressure – mobile in-store concepts to bridge physical and digital

Total retail market increased in 2011 by modest 0,8%. Online shopping grew 10,8%. Swedish study (Market) clearly indicates that mobile is a popular tool for price comparison, reviews and shopping (30% believed they will – within 3 years - purchase physical goods via mobile). Brick & Mortar is under pressure and during 2012 we can expect an increased interest among retailers to develop service concepts that can bridge physical and digital to add value on products or customer service. Concepts equal to Shopkick will reach the Swedish retail market in 2012.

Mobile Payment – Significant initiatives from the big carriers

In 2012 the biggest news within the area of mobile payment will be the launch of 4T-Sweden. A consortium between the 4 mobile carriers and Payex aiming to provide Swedish consumers with a seamless mobile payment solution

Contextual marketing – that's the future

Mobile has brought a new dimension in to contextual marketing and geo location is today the strongest feature in such efforts to be "hyper" relevant. Today Swedish retailers are doing geo campaigns, but not in large scale yet. Soon handsets will have new functions and sensors such as barometers, speedometers, thermometers, light sensors etc. This will take contextual marketing to an even higher level, maybe not 2012 though!

What plans do you as an IAB have for mobile for 2012?

IAB Sweden established its mobile task force in 2011. Primary goal for 2012 is to establish a Mobile Advisory Board to secure financing and a significant activity-level. Main challenges in the Swedish market are to educate and inspire the advertisers so revenues can pick up to the levels it deserves given the eyeballs it provides.

UNITED KINGDOM

Mobile Ad Revenue (2010):	£82m[38]
Main mobile operators:	Everything Everywhere (Orange & T Mobile), O2, 3, Vodafone
Mobile network technologies:	3G
Mobile voice subscribers:	49.5m[39]
Mobile data users:	29.53m [40]
Does your IAB have a mobile committee/council/ group?	Mobile Steering Group (MSG) and a Mobile Leadership Council (MLC)

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

According to the IAB/PWC mobile adspend study, the mobile advertising study was worth £82m in 2010, a like for like increase of 116% from 2009. Search makes up 66% of the mobile advertising spend and display advertising the remaining 33%. Breaking out display in more detail, banners & text links were 39% of the 82m, pre/post roll & in game 0.5%, tenancy deals 3.8% and SMS & MMS and other 3.2%. For more information on the study, please visit http://www.iabuk.net/research/library/Mobile-adspend

What do you think will be the biggest mobile trends or developments in your country in 2012?

Tablets are growing in the UK, 3.4m people in the UK currently own one (comScore Nov 2011) . In the UK we have undertaken some research to understand the role that tablets occupy in the consumer's portfolio of devices. The tablet appears to have carved a niche as the device for relaxed creativity, and 51% of tablet usage occasions in the UK happen in front of the TV. For more information on this study please visit http://www.iabuk.net/research/library/three-device-lives-tablets-in-context .

M Commerce in all its forms is currently undertaken by 51% of mobile phone owners in the UK. 24% specifically purchase a service or product via their mobile phone, spending on average £17.49 per transaction. More information on this can be found here http://www.iabuk.net/research/library/m-commerce-consumer-research-2011

What plans do you as an IAB have for mobile for 2012?

IAB UK has a range of events, research and whitepapers planned for the year. The largest event of the year will be Mobile Engage in early Summer for 600 delegates. The IAB/PWC mobile adspend study will be run biannually in 2012, along with other research projects including tablet adformats and mobile advertising case studies.

[38] Source: IAB (UK)/PWC Mobile Adspend Study

[39] Source: comScore, 3 month average to Nov 2011

[40] Source: Defined as browser/app users, comScore, 3 month average to Nov 2011

AUSTRALIA

Mobile Ad Revenue (2010):	Estimated display only $AUD 12m[41]
Main mobile operators:	Telstra, Optus, Vodafone (telcos); ninemsn, News Digital Media, Fairfax Digital, Yahoo!7, (media owners); Google, inmobi, BigMobile, (mobile sales networks)
Mobile voice subscribers:	24.22 million as at June 2009[42]
Mobile data users:	46% of all handsets are smartphones[43]
Does your IAB have a mobile committee/council/ group?	Yes, the IAB Australia Mobile Advertising Council (MAC).

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

I would describe the mobile advertising in Australia as nascent. The estimated $12m spent on display advertising on mobile phones is a mere 1.9% of the online display expenditure of $632m for calendar year 2011. There is a marked lag between consumer behavior – handset and smartphone penetration, time spent etc – and advertising expenditure.

All of the other points listed in part two of the above question are important to the Australian market.

What do you think will be the biggest mobile trends or developments in your country in 2012?

Having formed the IAB Australia MAC, we have embarked on 4 key projects namely: mobile audience measurement; research and case studies; advertising standards and guidelines; and mobile advertising expenditure reporting. The biggest mobile trend from an industry perspective will be publishing tangible outputs from these workstreams. Consumer behavior will continue to grow both on smartphone and tablet usage.

[41] IAB Australia estimate.

[42] Australian Communications & Media Authority (ACMA)

[43] Google

CHINA

Main mobile operators:	1. China Mobile's product including SP "Monternet " and an integrated service platform for app called "Mobile Market" 2. China Unicom's product including SP "Uni-Info" and an integrated service platform for app called "WoStore" 3. China Telecom, product including "ChinaVnet" and an integrated service platform for apps called "TianYi Space" 4. China Netcom: CNCMAX 5. China TieTong: Sihai Interactive
Mobile voice subscribers:	Over 900 million
Mobile data users:	356 million
Does your IAB have a mobile committee/council/ group?	The Interactive Internet Advertising Committee of China keeps an eye on the development of mobile web, and makes every effort into pushing its development.

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

The mobile advertising market is still in its infancy, ad formats for mobile are relatively simple and lack variety. But as data speeds increase, it has huge potential.

Where does mobile revenue come from? So far, it consists of two main channels:

- First, ads distributed by mobile operators. Businesses buy distribution platforms from mobile operators, "Business Message Communication" run by China Mobile offers such a service.
- Second, ads distributed by SP interactive platforms. The general process is that companies and SPs apply for mobile operators' approval, and distribute their ads on SPs interactive platforms.

There are also starting to be services built in app.

Data speed is vital for the development of mobile services. It will be improved dramatically in the near future, for it has been put into the priority list for China's development plan.

Chinese people send a huge number of messages each year, but due to the data speed improved for mobile network and the popularization of smart phones, 2011 was the first year that the number of messages sent through mobile showed negative growth. Instead, people using instant messaging and mobile web grew at a more rapid pace. This is a sign that the Chinese mobile web is going into its fast development phase.

General View of Mobile Ads and Marketing:

- Mobile web users tend to accept customized ads, such as"12580". So far, China Mobile is the main force in this field.
- According to a Millennial Media report, iPad still dominates the ad market for tablets. The revenue has increased 450% over last year, which accounts for 97% of the whole market. As for the smartphone ad market, Android OS smartphones play well, they accounts for 56%, iOS 28%. The market share for

HTC has increased 100%, and that for Huawei increased 200%. HTC and Huawei are mobile marketers with Android system.

- Video for Mobile: operators focus on the innovation for video business strategy, free targeted traffic, multi-screen integration and interaction, distribution on smart phone become three hot channels. China Mobile Television run by China Mobile and CCTV(China Central Television) is planning to adopt "free targeted traffic plus paid contend " model

NEW ZEALAND

Mobile Ad Revenue (2011):	Approx. NZD$632,092 for 2011[44]
Main mobile operators:	Telecom, Vodafone, 2Degrees
Mobile network technologies:	Smartphone penetration: of the over 4.5m phones in the market it's estimated: 800,000 are Smartphone's 250,000 are iPhone/iPad 150,000 are Android
Mobile voice subscribers:	N/A
Mobile data users:	N/A
Does your IAB have a mobile committee/council/ group?	Yes

What is the general state of mobile advertising/marketing in your country? Relatively speaking how important are each of the following: messaging (SMS or MMS); mobile web; mobile app; mobile search; mobile video?

Mobile is growing very slowly in New Zealand with SMS/MMS still the most prominent ad format. Only 35% of mobile phone users access the internet using their phone.

High penetration of mobile phone subscribers 4.6 million vs a population of 4.3 million New Zealanders

[44] Source: Measured by PwC however we are not currently capturing any Google Mobile advertising figures as they do not contribute to the survey

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iab.nz interactive advertising bureau

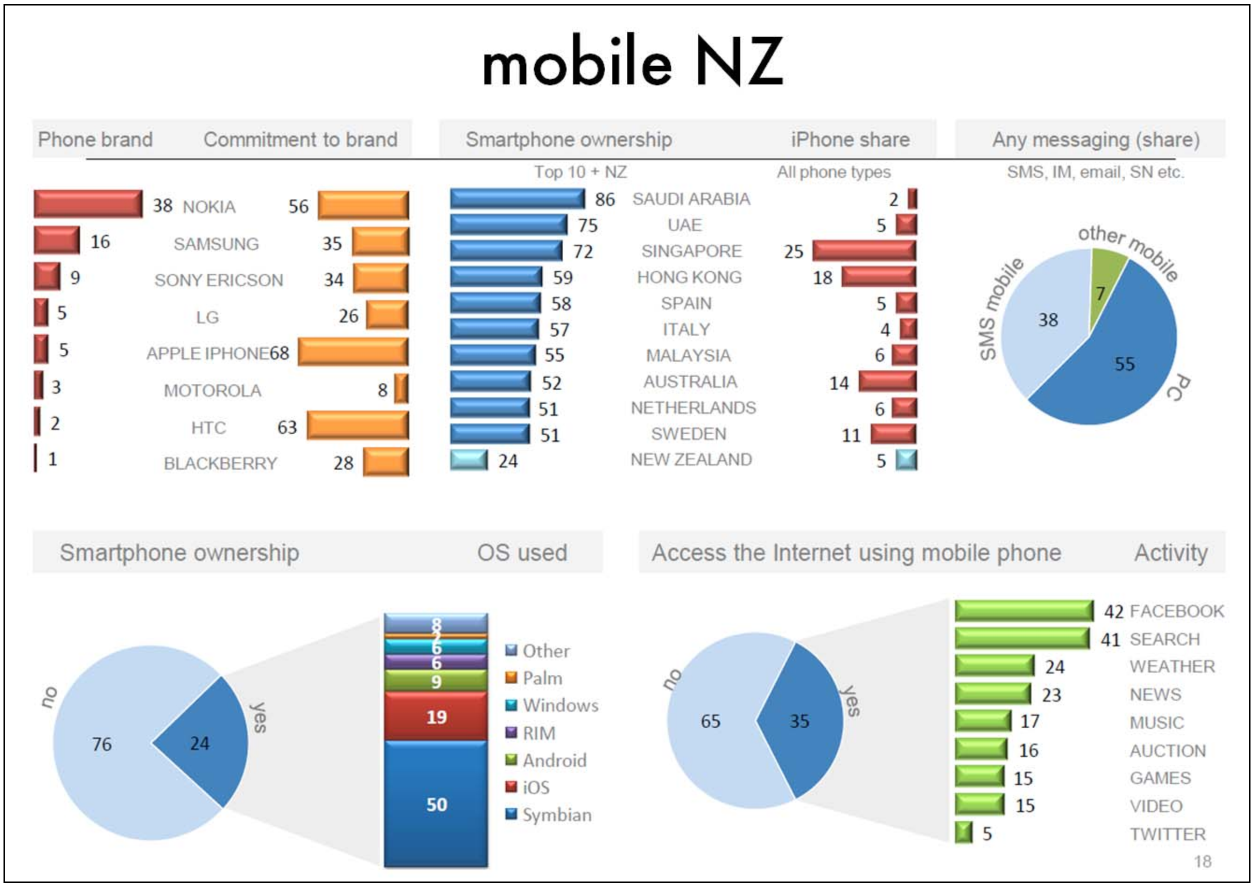
Mobile carrier market share:

45% on Telecom,
45% on Vodafone, &
10% with 2 degrees

What do you think will be the biggest mobile trends or developments in your country in 2012?

Consumers who do use mobile data report that it plays a significant role in their daily lives, including in some interesting and unexpected ways:

- 23% have used their mobile to cheat in a pub quiz
- 35% update their social networking sites from their mobiles everyday
- 45% say they are the first to know something because of mobile Internet
- 38% used the mobile Internet to settle an argument
- 41% said they check the Internet while on the loo



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The presence of companies like InMobi and Big Mobile in New Zealand will help drive advertising dollars however data charges are still high which presents a big barrier to users

What plans do you as an IAB have for mobile for 2012?

- Set up Guidelines & Standards
- Continue to educate advertisers on how to use Mobile as part of an integrated campaign