The State of the Mobile World 2014

AUGUST 2014

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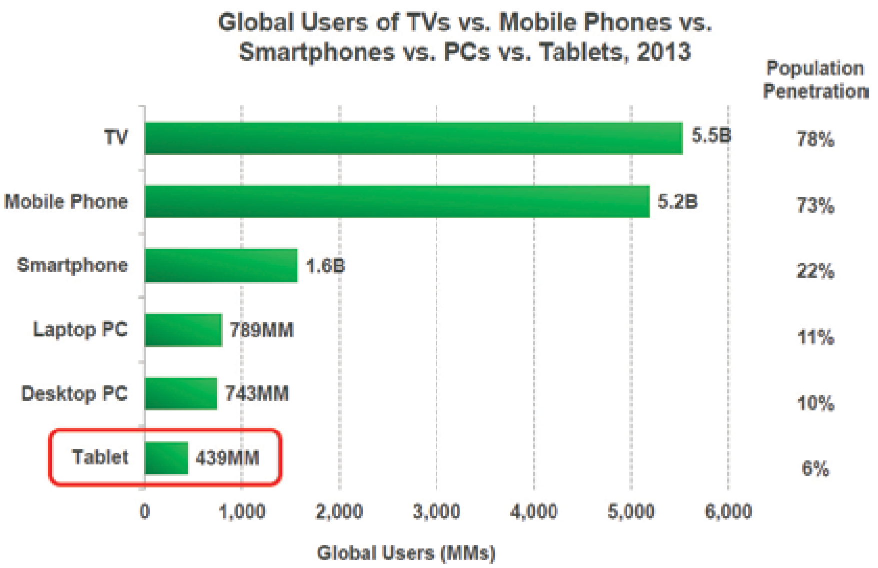
Introduction: It's a Mobile, Mobile, Mobile World[1]

Mary Meeker's annual Kleiner Perkins deck covering digital media[2] proved once again that globally the internet is an increasingly mobile phenomenon. As of 2013, 73 percent of people in the world had a mobile phone, and 22 percent had a smartphone. That compares to 11 percent penetration for laptops and 10 percent penetration for desktop PCs.



Source: KPCB estimates based on Morgan Stanley Research and ITU data. TV Users is estimate for users with TV's in household, given 1.4B households with TVs in the world.

However, the phrase "mobile internet" is really just a convenient umbrella term lumping together numerous different devices (phones, tablets, wearables…), network technologies (3G, 4G, wi-fi…), operating systems, and even media channels (web, apps…). It's therefore highly educational to look at regional and national variations in mobile adoption—and vital for companies pursuing an international mobile media or marketing strategy to do so as well.

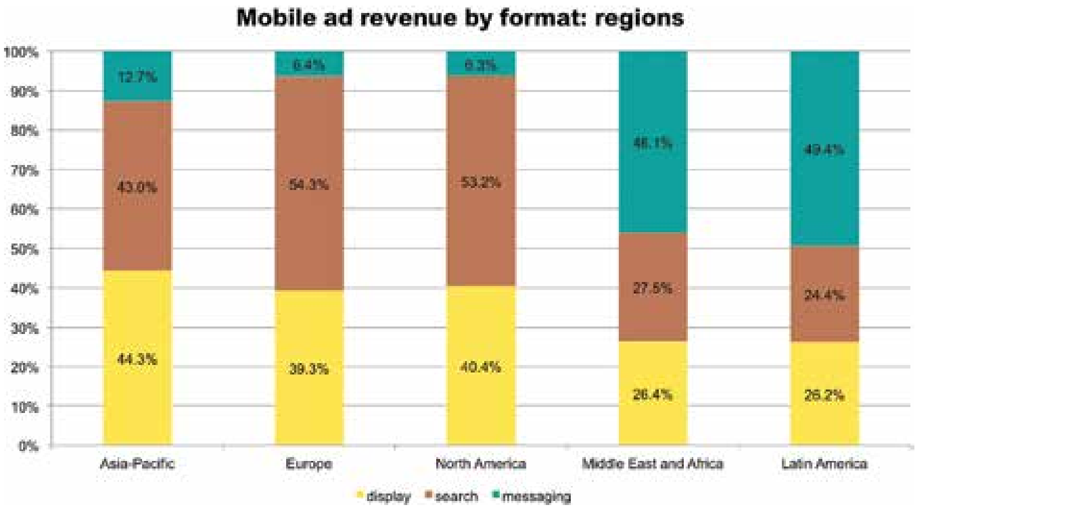
Follow the Money

In August 2014, IAB's Mobile Center and IAB Europe partnered with IHS to size the global market[3] for mobile advertising. There was $19.34 billion in mobile advertising in 2013, a growth rate of 92 percent relative to 2012. Globally the market was dominated by search and display revenue, which had approximately equal shares, while messaging revenue has been eclipsed by the other two channels.

That global pattern belies some significant regional variations. Latin America, where mobile advertising is still at a relatively early stage, saw explosive, 215 percent growth year-over-year, while in Asia-Pacific, home to more mature mobile media markets, grew "only" 68.5 percent annually (still pretty impressive).

In Europe and North America, search took the largest component of mobile ad revenue. In Asia-Pac, search and display split the market. And in the Middle East/North Africa and Latin America, messaging accounted for almost half of mobile ad revenue.

STRONG DIFFERENCES ACROSS FORMAT DISTRIBUTION GLOBALLY



Source: IHS, Global Mobile Advertising Revenue: The State of Mobile Advertising Around the World, released August, 2014

Thus while the mobile internet is definitively a global phenomenon, it is not happening everywhere in the same way or at the same pace. One interpretation of this is that the mobile internet develops in two phases: communication, then content.

- In countries where smartphone penetration is lower, 3G or 4G networks are relatively less available, and/or where mobile operators charge high data tariffs, communication is the dominant use of the mobile internet. SMS and to some extent MMS are the core use, and media companies and advertisers should focus on those messaging channels rather than developing web or app offerings.
- As smartphones become more prevalent, and network speeds support more media usage (assuming costs aren't too high), media consumption on mobile soars. This is when the possibilities of the mobile web and apps start to become realities, and as the audience grows, advertising revenue follows.

As people, businesses, and countries become "mobile first" at different speeds in different places, the global network of IABs has forged closer ties to share knowledge and experiences with one another. We've established a "Mobile Committee—Global" so that IAB staffers in different markets can compare notes and stay in the loop on what's coming. This document, the third edition of our Global Mobile Anthology, is one output of the increasing global connectedness of IABs.

This year's document more than doubles national submissions relative to previous years, to cover 31 countries across all world regions. We hope this document provides a useful reference for anyone looking to learn more about mobile's evolution across countries and continents.

[1] Adapted from Joe Laszlo, "Think Globally, Act Mobile-ly", ClickZ, August 27, 2014, http://www.clickz.com/clickz/column/2361951/think-globally-act-mobile-ly

[2] http://www.kpcb.com/internet-trends

[3] http://www.iab.net/globalmobilerevenue

AFRICA

South Africa

Mobile Ad Revenue:	N/A
Main mobile network operators:	Vodacom, MTN, Cell C, Telkom Mobile. Virgin Mobile still exists, but very small.
Mobile network technologies:	3G, 4G (LTE), WiFi
Mobile voice subscribers:	77.38 million Subscribers (148% Mobile Penetration)
Mobile Internet Users:	17 million[1]
Mobile data users:	Approx. 39m.[2]
Does your IAB have a mobile committee/council/group?	Yes, mobile is incorporated into IAB SA's Digital Marketing & Technology Council

[1] Source: Vodacom Annual Report 2014.

[2] Source: Vodacom Annual Report 2014, MTN Annual Report 2014, GfK South Africa Estimates.

Open-Ended Questions

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

MARKET OVERVIEW (SOUTH AFRICA)

POPULATION	POPULATION UNDER 25 YRS
53 Million	49%
MOBILE INTERNET PENETRATION	MOBILE PENETRATION
38%	140%
MOBILE INTERNET USERS	ACTIVATED SMART PHONES
17 Million	14 Million

Source: www.buzzcity.com

The SA internet market is dominated by the mobile segment due to increased investment in cellular coverage by mobile operators and decreasing tariffs.

According to PwC's entertainment and media outlook for 2013-2017;

Mobile advertising, which includes all spending on mobile phones and tablets (excluding text message advertisements), will see its share of Internet advertising increase from 16% in 2012 (it was just 2% in 2008) to 26% in 2017. Mobile advertising is forecast to increase from R189 million in 2012 to R938 million in 2017, a CAGR of 37.8%.

It has been suggested that there are more mobile phones in South Africa than there are people, and this is why projected growth in mobile advertising is so steep. According to some research, South Africans, and Africans in general, are more predisposed to receive advertising on their phones than their global peers. According to Millward Brown's AdReaction report in 2012, around 30% of the South African population have a favourable perception about advertisements on mobile phones and tablets.

South Africa is one of the most mature markets in Africa in terms of technology – in 2008 it was one of the first countries in Africa to provide 3G – and the rapid growth expected in mobile advertising throughout the forecast period is due to a rise in smartphone and tablet penetration, with smartphones expected to exceed 50% of the subscriber base by 2017.

The availability of cheap smartphones over the next few years will enable segments of the population that are currently unconnected to incorporate Internet browsing into their daily experience.

An important contributing factor in the rise of mobile advertising revenue has been the ability of social media to monetise its content. Facebook, for example, saw its global profits increase by 58% on the previous year in the first quarter of 2013, and the company reported that mobile advertising accounted for 30% of total advertising revenue during this period.

If social media can fully maximise its ability to display advertising on mobile devices, then its share of total mobile advertising will continue to increase as more people sign up to Facebook and other social networking sites.

Comment from Nicolle Harding, Vice Chair Mobile Marketing Association of South Africa (MMASA)

Mobile advertising and marketing is an incredibly dynamic medium and there are so many wonderful ways that a brand can utilise mobile to achieve success. Africa specifically offers solutions that have been built to solve African problems. As a result Africa is an innovation hub for the globe on how to treat certain barriers to entry for mobile in emerging markets and media black zones. Sadly the rest of the world don't get to see how creative we are locally. If you look at the recent Cannes Awards, there was not one African Mobile campaign shortlisted. I believe this is for a number of reasons, but mostly because brand custodians have not truly embraced the medium and are reluctant to allocate traditional size budgets to build strategies based on something they do not fully understand and that is not supported by hard data. Therefore the two pillars that we as advertising and marketing individuals need to focus on for mobile are measurement / data and education. Sharing of knowledge with decision makers and giving credibility to the medium, needs to be embraced by the digital fraternity to ensure it is given its true place in the marketing mix. Unfortunately in South Africa or Africa, desktop is not where the reach is.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

Viral mobile content – spread through IM platforms such as WhatsApp and WeChat. Also 2Go & Mxit.

Local mobile developers and startups – Such as: SnapScan by FireID; Bookly by Native Inventions; Alex Koller, local app developer of MyCitiBus app and Wxit (Wikipedia for Mxit), Glenn Stein – developer of Aweza African language app, ran BB Apps Lab,

Blogging community – The rise of successful bloggers eg: KimGray, HurricaneVanessa, 2OceansVibe etc). Some very successful startups that have been bought or partnered with large corporate companies.

Decreasing data tariffs and Wi-Fi progress -- We're seeing a few places launching free Wi-Fi in some communities. Eg: Former Mxit CEO (Alan Knott Craig Jnr) has founded Project Isizwe to roll out free Wi-Fi across the SA city of Tshwane. / Recent announcements for launching free Wi-Fi for SA taxis starting with 1500 public taxis with monetization from advertising to cover the costs. There is hope to make it national for all SA taxis in the next 2-3 years. / Western Cape Government also announced launch of free Wi-Fi at 10 – 15 schools, their goal is to make Wi-Fi free for all of the Western Cape. / MTN offers no data charges for use of Twitter, Wikipedia and live streaming of Cliff Central on We Chat

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

Data prices – High data prices mean that South African mobile users are inhibited from adopting smartphones, while those with smartphones are unable to use them without worrying about incurring high data bills.

Letting go of the "old faithful" CTR to measure a campaign's success

Many advertisers still treat mobile advertising the same way they do online desktop advertising (as an extension of desktop) It should be treated as a completely unique entity. i.e. a desktop ad banner will not perform if you shrink it to fit a mobile ad banner. All advertisers should integrate their campaigns around a mobile-first approach. Some agencies have succeeded, but it's taken much longer than expected to see an uptick in this approach across SA advertising.

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

We are actively working to include mobile in our measurement ecosystem. E.g. integrating mobile smartphones into Effective Measure's dashboard for the Telmar Internet Planner (this sits at the heart of what drives media spend in SA)

We now have the Vice Chair of Mobile Marketing Association of South Africa (MMASA) on the board of IAB SA

We hope to:

- Partner with MMASA & their members to provide any insights needed for SA mobile market.
- Run surveys based on local advertiser / industry requests (e.g.: Mobile banking, transport, ecommerce etc.)
- Education around mobile performance marketing and true ROIs
- IAB SA www.SlideShare.net contributions
- Endorse events such as
    - Mobile Web Africa (Matthew Dawes is organizer marketing@allamber.co.uk) www.mobilewebafrica.com
    - AfricaCom, held every year in Cape Town during November http://africa.comworldseries.com/ It is the biggest international mobile conference in SA

ASIA PACIFIC

Australia

Mobile Ad Revenue:	$349.2 million AUD[1]
Main mobile network operators:	Telstra, Optus
Number of mobile voice subscribers:	17.8 million[2]
Number of mobile data users:	9.1 million[3]
Availability of 4G:	Available to 85% of population
Smartphone penetration rate:	72%[4] iOS 42% Android 51% Other 7% [5]
Does your IAB have a mobile committee/council/group?	Yes – Mobile Advertising Council with representatives from 19 different organizations

[1] Source: IAB/PWC Online Advertising Expenditure Report

[2] Source: Roy Morgan Research

[3] Source: Roy Morgan Research

[4] Source: Telstra Nielsen Smartphone Index 2013

[5] Source: Telsyte Australian Smartphone Market Study 2014

Open-Ended Questions

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

2013 was the turning point for mobile advertising revenue in Australia – only 4% of the digital market was driven by mobile dollars in 2012 and early 2013. Constrast that with the first quarter of 2014, when mobile represented 17% of the total digital market and 21.5% of digital display.

IAB Australia expects this growth to continue throughout 2014 and 2015 as consumption of media sites (through browsers) through mobile devices already represents over half of visits.

How important is each of the following for your members' businesses or strategies:

Mobile web: Very Important

Mobile video: Very important

Programmatic/exchange-based ad buying in mobile: Very important

Mobile apps: Increasingly important

Location-based advertising: Increasingly important particularly to our buy-side members

Messaging–based ads or marketing: Not a major revenue driver or focus for the majority of our members

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

There are two areas that we expect to see develop quite rapidly in the local market in 2014:

1. **Mobile video** – the is both due to changing consumer habits as well as new products in market (such as video ads in mobile Facebook feeds)
2. **In app advertising –** there is no denying that vast majority of mobile time (particularly smartphone) is within apps and both the buy and sell side are now working out how to effectively use this opportunity.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

The market has indicated that meaningful measurement is their largest concern – both in terms of audience and campaign measurement. IAB Australia has invested heavily in launching a phone & tablet audience measurement panel in the market to help planning and is now working with marketers to help guide them to measure their campaigns on more meaningful metrics than a click.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

Pretty much everything we do now naturally has a mobile element built in but below are a few of our major projects for 2014

Measurement: IAB Australia teamed with Nielsen to launch a mobile audience panel, first data was released in June and will be released monthly for the remainder of the year.

Revenue Tracking: The IAB Australia/PWC Online Advertising Expenditure Report continue to expand mobile revenue report and introducing ad industry category report for mobile in 2H 2014

Industry Research: The 2nd annual IAB/TNS Mobile Landscape Report was released in April based on a survey of buy and sell side industry leaders

China

Mobile Ad Revenue:	No specific data
Main mobile network operators:	China Mobile, China Unicom, China Telecom
Number of mobile voice subscribers:	According to Ministry of Industry and Information Technology of People's Republic of China (MIIT), by January 2014, there are 1.235 billion mobile voice users in China.
Number of mobile data users:	0.5 billion users[1]
Availability of 4G:	No data.
Smartphone penetration rate:	No data.
Does your IAB have a mobile committee/council/group?	No.

[1] Source: MIIT http://www.miit.gov.cn/n11293472/n11293832/n11294132/n12858447/15861120.html

Open-Ended Questions

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

- 2013 highlighted the advantages of mobile market in China.
- Baidu, Netease, and Youku Tudou have great businesses in mobile.
- This year 4G network construction will be accelerated.
- Mobile video advertising is growing rapidly.

How important is each of the following for your members' businesses or strategies?

All aspects of mobile: messaging, web, apps, video, location-based ads, and mobile programmatic/exchange-based ad buying, are important in China.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

Mobile apps can better meet the needs of users, which is helpful for targeting audiences. With a variety of advertising formats and technologies, media agencies and advertisers have a more flexible platform to deliver advertising. 3G and 4G network development will motivate consumer adoption.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

The biggest challenge for the mobile advertising market is that it lacks authority, and needs recognized standards for the industry.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

IAB China is continuing to conduct joint research on mobile with IAB US.

iab.

New Zealand

Mobile Ad Revenue:	NZ$5.6m[1]
Main mobile network operators:	Vodafone, Telecom NZ, 2degrees
Mobile network technologies:	3G, 4G (Limited), Wifi
Mobile voice subscribers:	4.93m (120% market penetration)[2]
Mobile data users:	NA
Does your IAB have a mobile committee/council/group?	IAB New Zealand has Mobile Advertising Council (MAC)

[1] Source: IABNZ/PWC Interactive Advertising Spend Report Q4 2013

[2] Source: Annual reports of respective network operators

Open-Ended Questions

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

- Smartphone penetration is over 60%
- Mobile advertising increased 73% YOY in 2013
- 80% of all mobile phones being sold in New Zealand are now smartphones

How important is each of the following for your members' businesses or strategies (rank in order or importance):

1. **Mobile search**
2. **Mobile web**
3. **Mobile video**
4. **Mobile app**
5. **Smartphones**
6. **Tablets**
7. **Messaging (SMS or MMS)**

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

eCommerce - Mobile is one of the biggest influencers of e-commerce growth. And by 2017 more New Zealanders will be researching and buying on their mobile device than a desktop (source: www.stoppress.co.nz)

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

E-commerce may only represent between one to ten percent of a retailer's revenue, so the challenge is to convince senior management that alongside technical and staffing proficiency, a shift in operational mindset and approach is required. It's not a short-term strategy for short-term wins. It's an ongoing process of refinement to meet customer expectations and behaviours (source: www.stoppress.co.nz)

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

Key areas will include: local research and case studies; advertising standards and guidelines; and mobile advertising expenditure reporting.

Singapore

Mobile Ad Revenue:	NA
Main mobile network operators:	SingTel, Starhub, M1
Number of mobile voice subscribers:	156% penetration rate of mobile phones[1]
Number of mobile data users:	5.26 million 3G subscriptions as of 4Q 2013; 9.26 million wireless broadband subscriptions as of 4Q 2013; 10.13 million as of 2Q 2014[1]
Availability of 4G:	NA
Smartphone penetration rate:	NA
Does your IAB have a mobile committee/council/group?	YES

[1] Source: IDA http://www.ida.gov.sg/Infocomm-Landscape/Facts-and-Figures/Telecommunications#1

Open-Ended Questions

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

Mobile advertising is still on average below 3% of total media budgets and less than 10% of digital budgets for large brand advertisers. However, this is set to increase given that for many it was below 1% just two years ago. Most of this shift has been organic owing to increased consumer usage of smartphones.

One area that is still lacking is using mobile as a platform to leverage other media channels. Given its ubiquity, the challenge for marketers is to continually think how mobile links to other channels to derive incremental ROI. Other media cannot be thought in the same way, given mobile is the only medium which is literally with most people in Singapore 24/7.

How important is each of the following for your members' businesses or strategies:

Messaging –based ads or marketing: As Singapore is a relatively small market, push-based messaging is still a rather popular form of location-based marketing. It is much more straightforward to alert consumers to offers within defined areas, but this is being overtaken by more tailored solutions which target individual consumers at the right mindset and moment.

Mobile web: Two years ago, very few brands had a mobile-optimized site. This has changed dramatically as more consumers use their phone as tools for product research before making purchases. Initially, this resulted in consumers not having a great experience on mobile when landing on a brand's desktop .com or product-focused landing pages. Many advertisers have smartened up to this now, and while desktop is still seen as the more trusted place to make a purchase, mobile has become an essential screen in engaging with the consumer along the path to purchase.

Mobile apps: The challenge for apps was that most brands thought that you needed to create your own app, and once it was on the App Store, that people would immediately find it. App Discovery and also the utility factor of an application in a crowded marketplace, made a lot of apps 'floating tankers' on App Stores and wise marketers started to evaluate whether an app was going to help solve their business challenges before launching it. What is more exciting is ads that behave more like apps. Given the natural increase in the capability of phones, and improvements in connectivity, Singapore is a great market to try more interactive in-app advertising.

Mobile video: Mobile is fast replacing TV as the primary screen for entertainment around the world. That is the same in Singapore, where on average 40% of smartphone owners watch streamed video on their phones every day. This has yielded a sharp increase in mobile video ad spend, both on mobile web and in-app advertising.

Location-based advertising: Moving beyond push-based messaging, advertisers increasingly take more intelligent approaches to location, but challenges around scale still exist. As mobile phones become far more contextually aware, there will be a huge benefit for advertisers to reach consumers at the right mindset and moment.

Programmatic/exchange-based ad buying in mobile: Programmatic buying is constantly evolving and will no doubt increase, but mobile is still very new versus desktop buying. Agency trading desks are growing in presence and scale of supply available on exchanges will increase exponentially in the next year, providing great opportunities for performance advertisers and brands comfortable with automated buys on standard formats.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

The biggest mobile opportunity is in video as a format but also the chance to measure the effectiveness of mobile as part of the media mix. There are far more robust tools in place for measuring mobile campaigns. While not completely perfect, these can provide advertisers with a good barometer.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

The biggest challenge is definitely gaining confidence that mobile advertising delivers a better ROI than other forms of digital media. Advertisers have to invest in research and learning plans to measure success.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

IAB SEA, Singapore Chapter kicked off 2014 with a sold out deep dive Training Session on "Mobile: A Closer Conversation." This session covered Asian Mobile Trends, Measuring and Monetising Mobile Video, Technical Insights, Campaign Strategies and Opportunities in 2014. An IAB Mobile Committee is also one of the seven specialized Committees launched in 2014 and they will be leading a second Mobile Training Session in November 2014. Mobile has also been included in our agendas for our Programmatic, Measurement and Video Committee Training Sessions.

EUROPE

Austria

Mobile Ad Revenue:	1,863,000 (Mobile Display Advertising)[1]
Main mobile network operators:	A1 Telekom Austria, t-mobile Austria, Hutchison 3G Austria
Mobile network technologies:	2G, GPRS, EDGE, 3G, HSDPA, LTE
Mobile voice subscribers:	13.2M SIM cards (80% 3G/4G, 20% 2G)[2]
Mobile data users:	3.1M Smartphone tariffs (including data volume), 2.2M mobile broadband dongles, 150k M2M connections[2]
Does your IAB have a mobile committee/council/group?	Yes

[1] Source: Media FOCUS Research Ges.m.b.H.

[2] Source: www.rtr.at - Rundfunk und Telekom Regulierungs-GmbH (RTR-GmbH)

Open-Ended Questions

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

The Austrian advertising market is still dominated by traditional media, ie TV and print, with digital lagging behind. Overall market penetration in mobile is 130-140%+ showing the huge potential of the mobile segment.

Mobile advertising is progressing but still feels like it's wearing infant shoes compared to overall mobile usage. Many big players as well as SMEs still do not have any or an appropriate mobile web presence thus hindering them to book advertising on the mobile channel.

However, more clients are focusing their media strategy on mobile advertising this year. Mobile has become the 3rd important discipline in Digital Media, right behind Display and Search, but before Social and In-stream. Spending is increasing very fast, but is still at a low level.

How important is each of the following for your members' businesses or strategies (rank in order or importance):

From an agency perspective, as regards Mobile Marketing activities and volumes, I would see the following ranking:

1. **Mobile web:** Display ads, HTML5, In-line video ads, etc with clear focus on interactivity plus branding
2. **Mobile app:** Display ads, HTML5, In-line video ads, etc with clear focus on interactivity plus branding
3. **Mobile search:**
4. **Mobile video:** clear focus on pre-rolls plus in-line video ads
5. **Messaging (SMS or MMS):** hardly any stand-alone campaigns, rather used as a complimentary means for raffles, etc

The priority as regards devices is definitely Smartphones with increasing usage on Tablets.

From a media business perspective, I would see the following ranking:

1. **Mobile web & mobile app:** Depending on the overall aim, i.e. pushing an app or branding or response and interaction
2. **Mobile search:** additional and complementary to 1)
3. **Mobile video:** Complementary use of TV-spots cross-channel, i.e. via pre-rolls plus in-line video ads
4. **Messaging (SMS or MMS):** used as a complimentary means for raffles, etc.

Again, the priority as regards devices is definitely Smartphones with Tablets following.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

The biggest opportunity for media companies and advertisers in Austria is the rapidly increasing mobile usage. Average mobile usage among publishers ranges from 30-40% with some already having more mobile users than normal web. Media embrace of mobile will further this ongoing mobilization, ie more and more players either have apps, mobile only sites or start switching to responsive websites opening up an even bigger inventory and reach.

Furthermore new technologies such as HTML5 as well as content driven marketing (recommendation ads, content integrated ads, etc.) enable more sophisticated campaign creation with interactive elements, gamification and direct response elements.

Media planning based on and bundled with big data together with new technologies such as RTB will further push the mobile advertising sector.

Overall from a media agency perspective it is more and more important to show competence in the mobile segment.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

The biggest challenge will be to find the right way to address users on their mobile devices. Simple banners and transferring online strategies to mobile will definitely not work out and won't draw budgets into mobile. Thus integrated campaign concepts including direct response elements, geo-location, interactive elements, content-related placement and recommendations, etc. will definitely be the ones that win the race.

The challenge to integrate HTML5/responsive design formats into advertisers' offerings is going in line with the above. Media agencies will have to focus more on the special planning approach in mobile campaigns.

From the advertising perspective as regards the creative process, the biggest challenge is definitely standardization. HTML5 is progressing rapidly and it is necessary to define common standards in addition to existing ones such as MRAID and VAST.

Furthermore new technologies such as beacons, etc. will enrich location-based services and geo-marketing opportunities.

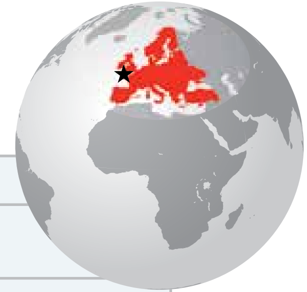
What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

The Mobile group of the IAB in Austria is currently working on an overview of the Austrian mobile market as well as creating mobile standards for the Austrian market and plans to publish them in Q3/2014.

The aim is to compile a complete list of publishers plus available mobile inventory (apps and mobile sites) as well as reach of the respective ad formats that can be booked.

Furthermore there is another working group on HTML5 standards to publish a first set of guidelines on HTML ad creation and media booking.

Denmark



Mobile Ad Revenue:	10.5m € (2013)[1]
Main mobile network operators:	TDC, Telenor, Telia, 3
Mobile network technologies:	3G, 4G, WiFi
Mobile voice subscribers:	4.0 million = 95% of population (age 16-74) "have used mobile phone within past 3 months"[2]
Mobile data users:	2.5 million = 60% of population (age 16-74) "have used internet via mobile phone/ smartphone within past 3 months"[2]
Does your IAB have a mobile committee/council/group?	Yes

[1] Source: Danske Medier Research / IAB revenue study

[2] Source: Statistics Denmark + Ministry of Culture

Open-Ended Questions

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

Mobile ad revenue in 2013 accounted for 1.6 percent of the total online ad spend in Denmark equivalent to € 10.5 million. This is twice the 2012 revenue of € 5.3 million and thus the market is growing rapidly. These figures only include advertising bought specifically for mobile media and do not include the mobile share of regular online advertising in general of which some "PC" digital ads are displayed on mobile devices.

There is a high degree of uncertainty connected to any attempt to estimate the mobile share of general internet display revenue, but eMarketer estimated the total Danish mobile ad spend to be up 120% reaching € 79.3 million including display (banners, video and rich media), search, and ad spending on tablets or 13.5% of total digital ad investments.

However, there is a widespread understanding that there is a large gap between the rapidly increasing mobile usage in the population and the relative small 1.6% share of online ad revenue allocated to mobile.

From an economic perspective, it is important to add that about 30% of the € 10.5 million mobile ad revenue went abroad, specifically to US based internet companies.

How important is each of the following for your members' businesses or strategies:

Messaging (SMS or MMS): SMS remains a key feature in Denmark as 84% of population use SMS[1]. Nevertheless, SMS traffic has decreased 15% from 2012 to 2013[2]. In contrary, MMS usage is increasing with 52% of the population using MMS, up from 46% in 2012[3] and MMS traffic has increased by 10%[4]. However, advertising revenue for SMS/MMS is insignificant. It is mainly used as a service or confirmation tool.

Mobile web: 60% of the population used the internet from mobiles in 2013, up from 55% in 2012[5]. Simultaneous with the increase in users, there has been a dramatic growth in usage as data traffic from mobile phones increased by a stunning 115% from 2012 to 2013[6]. On top of this, the opportunities to connect to internet via WiFi in public spaces have also increased, further boosting mobile internet usage. As consequence, mobile web is of rapidly increasing its importance amongst advertisers.

Mobile apps: Apps are used by 46% of population, up from 36% in 2012[7]. They are of increasing importance in terms of content marketing or service marketing, although the cost of production is an issue, especially for Android. The market currently knows quite a lot about the pros and cons of apps and responsive web, and so apps are no longer a must have, but more often a strategic choice rather than a rush to market approach. In terms of in-app display ads, these are generally less important although some ad inventory owners (media etc.) rely primarily on apps; and thus heavily emphasize in-app ads or integrated partnerships.

Mobile search: Search is an important component in the path to purchase. Amongst consumers, smartphones are most of all a tool to be used early in the consumer decision journey, less so the platform where the purchase is made. Searching for goods or services, comparing prices and reviews or asking for recommendations on social networks are all shopping-related tasks where mobile plays a key role.

Mobile video: Streaming in general is a widely used service, as 37% of mobile user's streams music or video[8] and is showing massive growth. Marketers are increasingly adding mobile video as integrated part of campaigns.

Smartphones: In 2013, smartphone penetration in the population was 67% up from 52% in 2012[9].

Tablets: In 2013, tablet penetration in the population doubled from 22 to 44% from 2012 to 2013[10].

Other: Mobile payments and mobile banking are growing rapidly and there is also a focus on pursuing second screen marketing opportunities.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

As the market matures and stakeholders increase their experience and insight on how smartphones fit in the marketing mix, there will be improved ability to effectively handle technical, conceptual, and business related issues.

Mobile marketing is increasing through several market drivers:

- Marketers will increasingly take advantage of context-aware mobile assets like location (geo-positioning), data gathering and the fact that the mobile is personal and always close to the user.
- Mobile is an excellent channel when building engagement and interaction, for example making mobile the bridge between online and offline.
- Increased focus on content and content marketing is key to unlocking mobile potential
- Rich media rapidly becomes part of mobile marketing
- Expertise amongst media, agencies and advertisers will bring new kinds of creative concepts to the market and new ways to measure success
- Ability to work more across channels, (ex. through responsive sites), will tie consumers closer to marketers.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

Many agencies are risk averse and therefore reluctant to recommend adding mobile to campaigns, because it is not always easy to measure effect and ROMI. Furthermore, digital campaigns do more often than not, contain a separate allocation for mobile, making it difficult to finance mobile investments as they are rather considered an optional add-on than integrated in digital marketing spend.

The technical aspects connected to mobile are barriers to growth; having many different ad formats makes it difficult for creatives to execute effectively. The technological choices required in the mobile business pushes many stakeholders out of their comfort zones and thereby hampers communication and growth.

Effectiveness measurement and documentation will continue to be an important issue, which will only be solved slowly. The traditional view on buying reach and frequency is not always the best way to leverage mobile assets and opportunities. Stakeholders must understand that CTR is usually not what works best in a mobile context. They must acknowledge that mobile is unavoidable early in the purchase funnel, but not where conversion happens. Finding the most suitable tracking vehicle may be very individual and closely related to the specific campaign objectives, rather than just reusing existing metrics. Privacy further restricts this.

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

- Seminars on mobile related issues, like effectiveness measurement, optimizing mobile usability and establishing closer relationship with users.
- Conferences on mobile media & advertisement, apps and mobile marketing
- Improving national standards for creatives (ad formats) and supporting these with further guidance
- Strengthening mobile measurement tools and reporting
- Increase communication to the market on mobile issues
- Build a catalogue of knowledge and provide this to the market
- Research on mobile campaign effectiveness and publishing report on mobile marketing
- If possible, build gallery of national case stories

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[1] Statistics Denmark

[2] Danish Business Authority

[3] Statistics Denmark

[4] Danish Business Authority

[5] Statistics Denmark

[6] Danish Business Authority

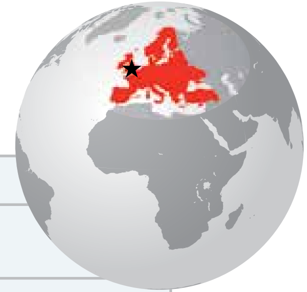
[7] Statistics Denmark

[8] Statistics Denmark

[9] TNS Gallup

[10] TNS Gallup

Finland



Mobile Ad Revenue:	10.3m EUR (Mobile display advertising)[1]
Main mobile network operators:	TeliaSonera, Elisa, DNA
Number of mobile voice subscribers:	9.3 million, of which 6 million are M2M subscribers
Number of mobile data users:	63% (2014)[2]
Availability of 4G:	11%[3]
Smartphone penetration rate:	65%[2]
Does your IAB have a mobile committee/council/group?	Yes

[1] Source: TNS Media Intelligence

[2] Source: TNS Gallup, NetTrack 2014

[3] Source: Elisa

Open-Ended Questions

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

Mobile advertising is growing strongly in Finland. Growth was greater than 300% in 2013.

How important is each of the following for your members' businesses or strategies:

Messaging–based ads or marketing: *The importance of messaging is split in two different lines.*

Messaging is not a focus in media agencies, it is used more for customer marketing.

That said, IAB Finland thinks that marketer messaging budgets seem to be higher than the mobile display advertising budgets. Nonetheless, media is not focusing on it that strongly.

Mobile web: Every media/web service has a different kind of mobile strategy. News sites need to have mobile web presence. Responsive web sites are becoming more common and replacing custom-built mobile web.

Sites are more and more built mobile first. This could be done either with responsive or with adaptive technologies depending on site type. Responsive is the better solution if a site seems to be generally static information, and adaptive is better if more advanced features are needed.

Mobile apps: Whether applications are needed depends on the usage and nature of the web service.

Mobile video: Usage is increasing but advertisers have not adopted video ads as fast as the usage has grown. One challenge is the bandwidth of mobile phones.

Location-based advertising: This is important but challenging because of limitations in getting the user's GPS-position.

Programmatic/exchange-based ad buying in mobile: Not happening yet

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

- Smartphone devices in Finland are advanced and this allows advertisers to expand their mobile advertising

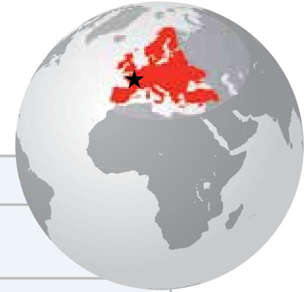
What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

- The business recovery has not really started in Finland yet and therefore advertising budgets are still moderate.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

- Probably a mobile seminar in late autumn 2014.
- We are updating the standards for mobile ad formats during 2014.

France



Mobile Ad Revenue:	8% of the digital revenue : €223,360,000[1]
Main mobile network operators:	Orange, SFR, Bouygues telecom
Number of mobile voice subscribers:	76 million sim cards in 2013[2]
Availability of 4G:	63% of the country
Smartphone penetration rate:	45% in 2013
Does your IAB have a mobile committee/council/group?	No

[1] Source: PWC for SRI

[2] Source: ARCEP

Open-Ended Questions

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

The French mobile media industry is in a state of contradiction: a lot of users; rising app and web mobile market and only 8% of digital revenue was mobile in 2013.

How important is each of the following for your members' businesses or strategies:

Mobile web: high

Mobile apps: high

Mobile video: high

Location-based advertising: high

Programmatic/exchange-based ad buying in mobile: medium; even if the programmatic is very high in France, the market doesn't want to focus on that

Messaging –based ads or marketing: low

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

The appearance of native formats and the geolocalization will be the biggest mobile opportunities in France this year.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

The biggest mobile challenge is for media/content companies to convert their massive audience into massive revenue; to convince advertisers to invest in mobile and to create new environment; to develop creativity; and to reassure marketers regarding KPIs on mobile, which happens to be as measurable as the PC based web.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

We had an event in February: "Transformation Through Mobile," and we will have one in September covering different topics (the program is still being defined).

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GREECE

Mobile Ad Revenue:	n/a
Main mobile network operators:	Cosmote, Vodafone, Wind
Mobile network technologies:	3G, 4G
Mobile voice subscribers:	6,396,000[1]
Mobile data users:	1,083,000[2]
Does your IAB have a mobile committee/council/group?	No

[1] Source: "Mobile Telephony Monitor" by Focus Bari Research Agency

[2] Source: "Mobile Telephony" Monitor by Focus Bari Research Agency

Open-Ended Questions

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

Mobile is a fast-growing medium in Greece, with 31.5% of the population having accessed the web through mobile within the past month. The percentage was as low as 6% just three years ago. One in four mobile phone owners owns a smartphone.

With regards to advertising, IAB estimates, through informed sources, that ad spend on mobile is currently less than 1% of the total digital ad expenditure in Greece. Advertisers, especially from the retail and banking sector, are testing the waters through push messaging and the first display offerings from major publishers, who in turn have largely optimized their websites for mobile, accommodating for mobile-friendly ad formats. With mobile data plans still very expensive for the average consumer, the market is still reluctant on mobile video.

How important is each of the following for your members' businesses or strategies (rank in order or importance):

In order of importance:

1. **Mobile web**
2. **Messaging (SMS or MMS)**
3. **Mobile search**
4. **Mobile app**
5. **Smartphones**
6. **Tablets**
7. **Mobile video**

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

By definition, the sheer increase in mobile web usage creates an opportunity for media companies to create compelling products and services on the mobile space, either paid or advertising-funded, and for advertisers to add this touchpoint and increase/enhance engagement with the consumer.

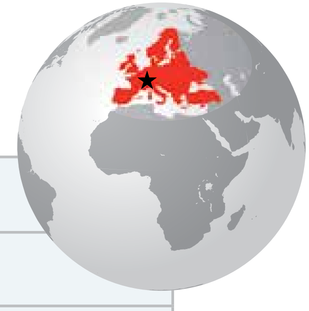
What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

Measurement and accountability will be the biggest mobile challenge for the year to come. Advertisers will demand proof of their investments not simply through isolated mobile metrics, but through measurements integrated with the rest of their digital efforts. Mobile measurements will be included shortly within the currency online audience measurement survey supplied by the Greek Online Publishers' Association.

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

IAB Greece has already organized a seminar on Mobile Marketing in 2013, which attracted the interest of major local agencies, and we plan to repeat this event in September 2014 with a revised and more fine-tuned agenda. IAB Greece is also looking into recording mobile ad spend for 2014.

Hungary



Mobile Ad Revenue:	1.943 bln HUF ~ 6.3 mln € ~ 8,6 mln USD 5% of the digital ad spend[1]
Main mobile network operators:	Telekom, Telenor, Vodafone
Number of mobile voice subscribers:	11,072,773 (Number of subscriptions actually generating traffic (pc)) (mobile subscriptions/100 inhabitants: 116.9)[2]
Number of mobile data users:	3,132,710 (pc)[3]
Smartphone penetration rate:	24% (18+ Hungarian citizens, eNet, December 2012) 57% (18+ Internet user Hungarian citizens, Gemius, January 2014)
Does your IAB have a mobile committee/council/group?	yes mobil@iab.hu

[1] Source: IAB revenue study by PwC

[2] Source: National Media and Infocommunications Authority, Hungary
http://english.nmhh.hu/dokumentum/163501/mobilhang_gyj_2014_05_en.pdf

[3] Source: National Media and Infocommunications Authority, Hungary
http://english.nmhh.hu/dokumentum/162516/mobilinternet_gyj_2014_januar_eng.pdf

Open-Ended Questions

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

Mobile advertising is still immature (5% share), but advertising spend is growing at a huge pace (115% YoY). The Hungarian market has its own players specializing on mobile and the multinational players are also bringing their mobile services to the country.

How important is each of the following for your members' businesses or strategies: Messaging –based ads or marketing; Mobile web; Mobile apps; Mobile video; Location-based advertising; and Programmatic/exchange-based ad buying in mobile?

Hungarian media players have mobile apps for their content and services. They are monetizing mobile app traffic using traditional sales channels and also mobile-specific marketplaces as well, similarly to their responsive or mobile-specific website versions. They are including mobile video content in their content stream.

We do not have Hungarian messaging service vendors, location based and programmatic are in experimental phase.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

Additional attention from the users and new cooperation with marketers to enable media companies to monetize their trusted brands and their quality content further.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

Measurement, privacy, and competition are three mobile challenges in the Hungarian market.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

Amongst others, we published a "Mobile Marketing Manual" that we are updating, we are improving our Mobile Adex methodology and the Mobile Working Group is pushing for ways to educate clients further via seminars. Finally, our master course has mobile focus.

The Netherlands

Mobile Ad Revenue:	9% of the digital display ad revenue (€520m including estimates for Google and Facebook) would make €46.8m[1]
Main mobile network operators:	Vodafone, KPN and T-Mobile
Number of mobile voice subscribers:	21.5 million[2]
Number of mobile data users:	10 million[2]
Availability of 4G:	543,000 4G subscribers (KPN), 650,000 subscribers (Vodafone) 18% of the Dutch populaton has a 4G phone, of which 28% use it.[3]
Smartphone penetration rate:	72% of which 78.1% Android and 17.6% iOS and 3% Windows[4]
Does your IAB have a mobile committee/council/group?	IABNL has a taskforce mobile consisting of approximately 15 people from different digital and mobile companies

[1] Source (Where did this number come from: IAB revenue study, research firm, other?): Adspent study IAB (2013)

[2] Source: Telecommonitor Q4 2013

[3] Source: Telecompaper and annual reports KPN and Vodafone

[4] Source: Telecompaper

Open-Ended Questions

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

Even though there is still a big gap between time spent and ad spending on mobile, things are looking up. Mobile has finally shown the anticipated growth in advertising spend, reaching a significant 9% share of display advertising in 2013. Mobile display advertising took a big jump in 2013, tripling the ad spend relative to 2012! The biggest growth we see occurs at the end of the year, making it likely growth will be even bigger in 2014. For advertisers it will be crucial to adopt, execute and improve mobile campaigns, to interact with the still growing number of mobile consumers.

How important is each of the following for your members' businesses or strategies:

Mobile web: important

Mobile apps: important

Location-based advertising: important

Programmatic/exchange-based ad buying in mobile: important

Mobile video: important but in early stages

Messaging-based ads or marketing: not very important

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

Location based advertising, video, and native ads are all big mobile opportunities this year. Automated trading and data will also be significant.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

Companies are moving way slower than the consumer; they need to speed up or else could miss the boat.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

We have divided ourselves in the following subgroups: Events (Cannes Mobile Lions in Amsterdam), Standardization (publish guidelines and requirements for mobile advertising), Cases (produce and publish cases and benchmarks for mobile advertising) and Research (we would like to make all mobile traffic data insightful and visible).

Norway

Mobile Ad Revenue:	280,321,092 NOK[1]
Main mobile network operators:	Telenor, Netcom (TeliaSonera)
Mobile network technologies:	4G, 3G, Wifi
Mobile voice subscribers:	5,863,034[2]
Mobile data users:	About 64% of mobile subscribers use mobile data at the end of 2013. About 35%/over 2 million subscribers have more than 1 Gbyte per month included in the subscription at the end of 2013. There are 822,422 separate subscriptions for mobile broadband in 2013. Total data traffic grew 55% from 2012 to 2013, reaching 37,000 Tbyte.[3]
Does your IAB have a mobile committee/council/group?	IAB Norway has two mobile-focused working groups. One for mobile display ads and one for mobile insight

1 Source: IAB Norway Ad Revenue Reporting

2 Source: Norwegian Post and Telecommunications Authority, http://eng.npt.no

3 Source: Norwegian Post and Telecommunications Authority, http://eng.npt.no3

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

Mobile advertising is growing very strongly in Norway–we saw 234% growth in mobile advertising spending from 2012 to 2013.

How important is each of the following for your members' businesses or strategies (rank in order or importance):

In order of importance (1=most important, 7=least important):

1. **Mobile search**
2. **Mobile web**
3. **Smartphones**
4. **Mobile app**
5. **Mobile video**
6. **Tablets**
7. **Messaging (SMS or MMS)**

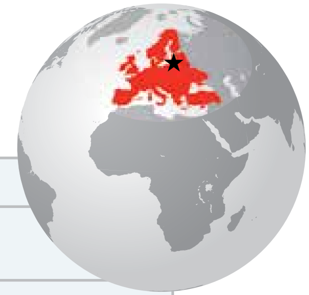
What do you think will be the biggest mobile opportunity and the biggest mobile challenge for media companies or advertisers in your country in 2014?

Regarding both opportunities and challenges: We are working towards an HTML5 standard for advertising that will be a major improvement for display ads on mobile.

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

In addition to the HTML5 project, we plan to conduct a study of purchasing behavior on mobile in Norway.

Poland



Mobile Ad Revenue:	26,752,000 pln[1]
Main mobile network operators:	Plus, T-mobile, Orange, Play
Mobile network technologies:	LTE, 3G, 4G, WiFi
Mobile voice subscribers:	
Mobile data users:	
Does your IAB have a mobile committee/council/group?	Yes, we have a mobile group

[1] Source: IAB AdEx 2013

Open-Ended Questions

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

In 2013 mobile network operators changed their strategies and pricelists. As a result smartphones and smartphone usage has become much cheaper and available for an average user.

How important is each of the following for your members' businesses or strategies (rank in order or importance):

1. **Mobile web**
2. **Mobile video**
3. **Mobile app**
4. **Smartphones**
5. **Tablets**
6. **Messaging (SMS or MMS)**
7. **Mobile search**

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

High smartphone penetration is the biggest mobile opportunity. The current smartphone penetration level in Poland is around 44% and it increases every month.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

Mobile monetization will be the biggest mobile challenge in Poland. Although more and more people own and use smartphones in Poland and mobile ad revenue has been growing considerably for a few years, it comprises only 1% of online advertising revenue.

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

- Mobile research "Mobile in 2014"
- Case study collection
- Educational mobile breakfasts for marketers
- Mobile handbook for marketers

Romania

Mobile Ad Revenue:	223,014 EUR (does not include SMS and mobile ad networks/suppliers that are not included in ROADS)[1]
Main mobile network operators:	Vodafone, Orange, Cosmote
Number of mobile voice subscribers:	22,9 million[2]
Number of mobile data users:	12.1 million[2]
Availability of 4G:	3rd highest country in EU in terms of coverage
Smartphone penetration rate:	28%
Does your IAB have a mobile committee/council/group?	Yes

[1] Source: IAB ROADS (Romanian Advertising Spend)

[2] Source: ANCOM (national authority in communications) report 2013

Open-Ended Questions

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

Mobile in Romania is mostly ruled by SMS campaigns, brands have just started discovering mobile apps. Mobile display is mostly done on Google and Facebook rather than on local publishers.

How important is each of the following for your members' businesses or strategies:

Messaging–based ads or marketing: very important

Mobile web: important

Mobile apps: important

Mobile video: not used & explored enough

Location-based advertising: not used and explored enough

Programmatic/exchange-based ad buying in mobile: not used & explored enough

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

More than 2/3 of Romanians use Facebook on their mobile phone and searches on mobile are exploding as more Romanians access the internet from a mobile device than on a PC (INS study December 2013)

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

n/a

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

The IAB Romania Mobile Task Force is currently working on a Mobile Handbook for advertisers regarding "all you need to know" for an efficient mobile campaign.

Slovakia

Mobile Ad Revenue:	Very low - Not measured yet
Main mobile network operators:	Telekom, Orange, O2
Number of mobile voice subscribers:	115% (ca 6.0 mil users of 5.4 mil. Slovak population)
Number of mobile data users:	2.0 mil. (all devices)[1]
Availability of 4G:	32 key cities covered by 4G LTE network operated by Telekom 20-30% of country covered
Smartphone penetration rate:	1,1 mobile RU – AIMonitor Gemius & Mediaresearch 30% estimated users that use smartphones as mobile data devices (real penetration might be higher, since for example Orange stated, that ? of sold mobile phones are smartphones)
Does your IAB have a mobile committee/council/group?	No

[1] Source: Various/Telekom/Orange/IAB Slovakia estimate

Open-Ended Questions

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

Low/minimum level

How important is each of the following for your members' businesses or strategies:

Messaging–based ads or marketing: Low importance

Mobile web: In activation phase

Mobile apps: In activation phase

Mobile video: Important but almost no activity so far

Location-based advertising: Important but low activity so far

Programmatic/exchange-based ad buying in mobile: We are just starting with RTB in Slovakia, so depends on RTB (including mobile) maturity in the market

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

To stay in with the latest digital trends and be where customers are

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

Several challenges: operators must adjust/decrease prices, and media companies must develop and run mobile webs, educate clients, set up mobile users/traffic measurements

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

No events, webinars or other education so far

More precise online mobile traffic monitoring (AIMonitor/Multiplatform) based on new methodology should start in 2015

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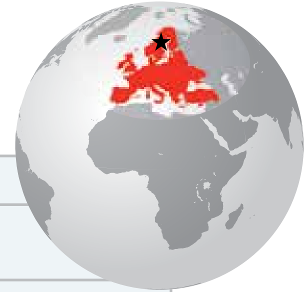
Sweden



Mobile Ad Revenue:	133 million dollar or (894 millon SEK)[1]
Main mobile network operators:	Telia, Tele2, Telenor[3]
Number of mobile voice subscribers:	130% (coverage 98%)[2]
Number of mobile data users:	65%2
Availability of 4G:	90% of the country covered according to the biggest teleoperator Telia Smartphone penetration rate: 75% TNS Sifo 2014 Q1
Does your IAB have a mobile committee/council/group?	We had a mobile group for 3 years, but our Board just decided to close it down and have mobile specialist in all our task forces instead.

[1] Source: IRM Media Institute

[2] Source: TNS Sifo 2014 Q1

Open-Ended Questions

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

Mobile advertising is growing very rapidly and is projected to increase by 75% in 2014. Still, the use of and time spent by consumers on mobile is much higher than advertising investment.

How important is each of the following for your members' businesses or strategies:

Mobile web: is very important but many companies still have bad mobile versions of their websites—or none at all.

Mobile apps are very important to a lot of our members specifically for publishers and large B2C companies.

Mobile video is growing rapidly though we have no figures on just mobile. All online video ad inventory is sold out right now.

Location-based advertising was the subject of a new IAB Sweden is launching a study reporting on geo-targeting for mobile in Sweden. There are still relatively few campaigns that make use of full geo-targeting because it has some technical limitations. But interest is high.

Programmatic/exchange-based ad buying in mobile IAB Sweden has no stats on mobile programmatic, as programmatic has just taken off on desktop in Sweden. But we are sure it's coming very quickly.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

Mobile payments, more targeted campaigns, better mobile versions of web sites and marketers making it easier to convert on mobile.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

A lot of Swedish websites have more then 50% of their traffic coming from mobiles today, and yet there are still many bad mobile sites. Swedish companies must do better. A lot of companies and publishers will have a hard time adapting that quickly. It is still long before these companies think mobile first.

Making it easier for visitors to convert on the smart phone and not having to go to a desktop is a critical challenge. Also marketers must improve at knowing how to use data to target campaigns and thus be able to make ad campaigns more personal and relevant.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

1. We launched the first IAB Sweden mobile display standard in January 2014
2. Geo-targeting study report will be launched in September 2014
3. We will launch a study of possibilities and difficulties of m-commerce in December 2014
4. We will make sure that all our task forces have mobile on top of their agenda. (These include search, online video, Programmatic, display, Native, BA etc.)
5. Mobile will be included in all our seminars during the year.

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Switzerland

Mobile Ad Revenue:	No figures available, but approximately CHF 15M for Mobile Display[1]
Main mobile network operators:	Swisscom, Sunrise, Orange
Number of mobile voice subscribers:	9.255 million (122% penetration)[2]
Number of mobile data users:	
Availability of 4G:	91% of urban and suburban areas[3]
Smartphone penetration rate:	60%[4] 54%[5] => IAB Switzerland believes the 60% net-metrix estimate is closer to the right figure
Does your IAB have a mobile committee/council/group?	Yes, IAB Switzerland has a specialized group for mobile advertising linked with the mobile ad format group and a tight cooperation with the Swiss Mobile Association (smama.ch)

1 Source: Mobile Advertising group of IAB Switzerland

2 Source: www.itu.int Link

3 Source: Swisscom http://www.swisscom.ch/en/residential/mobile/mobile-network/4g-lte.html

4 Source: net-metrix Mobile Report 2013

5 Source: think.withgoogle.com/mobileplanet

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

Mobile Advertising is catching up and becoming a valued addition to desktop formats. Mobile-only campaigns are becoming more popular. Mobile's share of all digital ad revenue is growing--the revenue share right now is 75% desktop and 25% Mobile.

How important is each of the following for your members' businesses or strategies:

Messaging–based ads or marketing: Importance for advertisers is falling rapidly. Some network operators use such technologies to spread news about their services or special offers (e.g. data traffic from abroad).

Mobile web: Mobile web in Switzerland is less relevant than mobile apps. However advertising in the mobile space is becoming more common quite quickly.

Mobile apps: All of the relevant publishers in Switzerland offer sophisticated mobile apps for iOS and Android. As the quality of ads can be adjusted more precisely than in the mobile web, advertising within mobile apps is more relevant and common as well.

Mobile video: Mobile video is about to take off. Significant growth is expected for 2015. Right now the technologies on the ad server-side are the critical factor.

Location-based advertising: Location-based advertising is available for classified apps and within larger global networks. Right now the demand for LBA within classical campaigns is still very low.

Programmatic/exchange-based ad buying in mobile: Programmatic is about to take off fast in online as the major publishers start to sell their inventory on a partly programmatic basis. Therefore the attention on programmatic buying for mobile is coming up. Programmatic buying on a network basis – especially for performance based campaigns – is already there. In these cases buying takes place on the platforms of global players.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

- Multiscreen advertising
- Enabling of technologies (to increase impact)
- Increase targeting opportunities
- Dedicated resources to monetize and develop

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

- Reduce the inhibition threshold for mobile advertising by establishing a smaller range of formats
- Make booking mobile advertising easier

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

- Introduce a standardized mobile ad pack
- Transfer know-how by publishing topic papers (e.g. on LBA, Targeting/Tracking, Programmatic…)
- Open up a case gallery on the IAB Switzerland site

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Turkey

Mobile Ad Revenue:	44.8 Million TL = $23.5 Million (TL/$ Exc. Rate= 1.9034 - Turkish Central Bank 2013 daily rate average)[1]
Main mobile network operators:	Avea, Turkcell, Vodafone
Number of mobile voice subscribers:	69,661,108 subscribers in Turkey with a penetration of 90.9%[2]
Number of mobile data users:	The total 3G subscribers number is 49,266,163[3]
Availability of 4G:	4G is not available in Turkey at the moment. However mobile operators have started testing it.
Smartphone penetration rate:	Smartphone owners rate: * Among Avea subscribers: 42% (14.5 Million total mobile subscribers) * Among Turkcell subscribers: 32% (35.2 Million total mobile subscribers) * Among Vodafone subscribers: 34% (19.9 Million total mobile subscribers)[4]
Does your IAB have a mobile committee/council/group?	IAB Turkey New Trends Committee is working on mobile marketing aspects along with any other new trends and innovation. It is responsible of providing white papers and revealing new technologies and best practices for the market.

[1] Source: IAB Turkey AdEx 2013 Digital AdEx-TR Study

[2] Source: Turkey Information and Communications Authority 2013 4th Qtr report (http://eng.btk.gov.tr/kutuphane_ve_veribankasi/pazar_verileri/2013_Q4_ECM_MarketData.pdf)

[3] Source: Turkey Information and Communications Authority 2013 4th Qtr report (http://eng.btk.gov.tr/kutuphane_ve_veribankasi/pazar_verileri/2013_Q4_ECM_MarketData.pdf)

[4] Source: Company press releases of each mobile operator

Open-Ended Questions

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

Mobile advertising revenues have increased at a rate of 24%, totalling $23.5 million in 2013. Mobile's share of total digital ad revenues is 4%. Although mobile revenues are rising at a high rate, the market size is very small and there is a long way ahead of mobile marketers. Everyday advertisers understand the power of mobile better as new successful campaigns arise and prove its power.

As the mobile ecosystem grows, its requirements grow as well. IAB Turkey Internet Audience Measurement Study has widened its scope accordingly and starting from March 2014, websites' traffic coming from PC, smartphones, tablets and other devices (E.g. Smart TV, game consoles etc.) are being reported separately. This new multiplatform approach is going to provide the required measurement data for the mobile market in Turkey.

How important is each of the following for your members' businesses or strategies:

(In a 1-5 Scale, 1=least important, 5=most important)

Messaging –based ads or marketing:

5. Advertisers

3. Agencies

2. Publishers

Mobile web:

5. Publishers

4. Agencies

4. Advertisers

Mobile apps:
5. Publishers
5. Agencies
5. Advertisers
Mobile video:
5. Publishers
5. Agencies
4. Advertisers
Location-based advertising:
4. Publishers
4. Agencies
4. Advertisers
Programmatic/exchange-based ad buying in mobile:
5. Publishers
4. Agencies
2. Advertisers

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

The booming usage of social media on mobile is the biggest opportunity as it makes the mobile internet a requirement from the consumer viewpoint. A big portion of people who claim that they don't use mobile Internet ironically also claim that they use social media via their mobile devices.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

The main challenge for mobile in Turkey is the lack of knowledge in the industry, especially the decision makers who are relatively older. This naturally creates hesitancy to prefer mobile to the traditional digital platforms. The potential of mobile has to be revealed to these more traditional marketers decision-makers to rapidly boost its growth rate.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

- We have published mobile creative guidelines in Turkey.
- We honor mobile creatives, websites and applications at our Mixx Awards Turkey.
- The New Trends Committee produces white papers about aspects of mobile marketing.
- On all of our educational programs and seminars, mobile has one of the major roles as a trending topic.

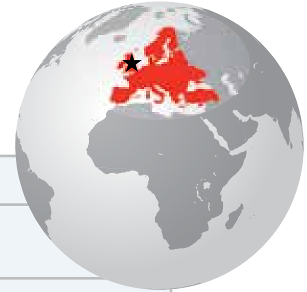
  o Digital Marketing Master program in cooperation with Istanbul Trade University

  o Interactive Marketing Certificate Program in cooperation with Kadir Has University

  o SME Online Training Program: This project is established to educate the local SME's.

  o Workshop series among the hot topics of digital marketing called 4X4.
- We have an established relationship with MMA Turkey and plan to cooperate for certain activities in the future. Some of the IAB Turkey board members are also in MMA Turkey board. This strengthens the relationship.

United Kingdom



Mobile Ad Revenue:	£1.031bn[1]
Main mobile network operators:	Orange / T Mobile (EE), Vodafone, O2
Number of mobile voice subscribers:	50,000000[2]
Number of mobile data users:	38,000,000[2]
Availability of 4G:	20% of UK handsets with 4G capabilities[2]
Smartphone penetration rate:	77% of the UK population own a smartphone[2]
Does your IAB have a mobile committee/council/group?	Mobile Council (open to all IAB UK members), Mobile Leadership Council, Mobile Board, Agency Ambassadors

[1] Source: IAB / PWC UK Digital Adspend Study, Full Year 2013

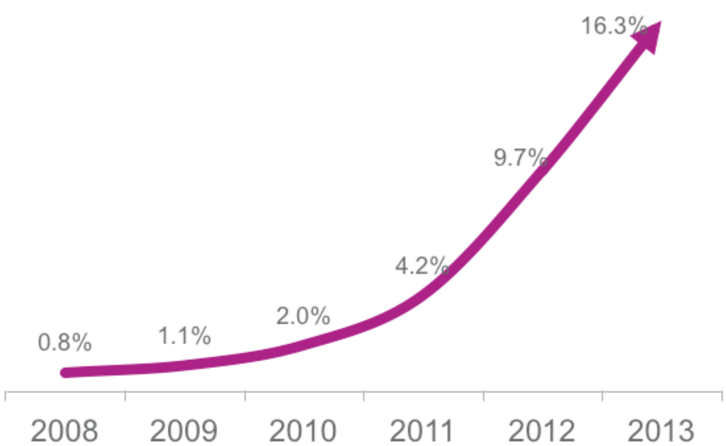
[2] Source: comScore, April 2014 3 month average

Open-Ended Questions

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

Mobile advertising has seen huge growth in the UK over the past year. In fact, full year 2013 figures show the total mobile market at £1.031bn. Mobile has seen a 93.3% year on year increase, from 2012 to 2013, which is testament to the fact that brands are seeing results from their mobile advertising efforts, and now view the channel as a critical part of their marketing activities. Furthermore, mobile takes a 16% share of the total digital spend in the UK, and is seen as a real driver of growth for the total digital market.

% SHARE THAT MOBILE TAKES OF TOTAL DIGITAL SPEND; SIX YEAR TREND



Source: IAB / PWC UK Digital Adspend Study, Full Year 2013

How important is each of the following for your members' businesses or strategies:

Messaging–based ads or marketing: Mobile messaging is a critical part of many UK advertisers' mobile strategies. Full year 2013 UK market figures show SMS marketing at 1.3% (£13.0m) of total mobile spend. This is up 59% year on year (2012 to 2013), on a like for like basis, and is set to continue its steady growth over the next five years.

Mobile web: According to our latest Adspend figures, 40% of standard display spend is in browser inventory.

The IAB UK has a strong focus on educating advertisers about the value of having a presence on mobile web. We use optimised sites as a proxy to advertiser investment in mobile web advertising, and have conducted a number of studies to understand the mobile readiness of the top UK brands.

Our latest European Mobile Optimised Site Study found that 64% of the top 100 UK advertisers had a site optimised for mobile. Whilst this number has grown over the past year (from 58% in August 2013), it's still at a point which sees over a third of the top spending advertiser in the UK without a site that works on mobile.

Mobile apps: According to our latest Adspend Study, 60% of standard display ad spend is in app inventory.

Mobile video: Mobile video is the fastest growing format on mobile, and has seen huge growth in the past year. From 2012 to 2013 it saw uplift in investment of 346%, and it is now a sizeable chunk of the total mobile market. Mobile video growth looks set to continue over the next five years as advertisers are increasingly using mobile as a branding channel.

Programmatic/exchange-based ad buying in mobile: Programmatic on mobile has become increasingly important to member companies of the IAB UK, and has led to the creation of the Mobile Programmatic Working Group which aims to tackle some of the issues which buying and selling mobile programmatically presents.

As part of our continued efforts to understand this area of the market, the IAB UK has recently conducted a piece of research investigating how digital display is being traded in the UK (Media Owner Sales Techniques). The study found that 28% of the total market is being traded programmatically. However, if you look specifically at the way that mobile is traded that number rises to 37%.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

The UK consumer is one of the most tech reliant in the world, and this was highlighted in RealView, the IAB UK's biggest ever research project, with one in three people claiming that their smartphone was their lifesaver. Furthermore, smartphone penetration in the UK is now at 77%*, with a further 37% owning a tablet*. This presents a huge opportunity for UK businesses to create compelling mobile experiences.

As more and more UK consumers use devices to interact with their favorite brands it's never been more important to give them an experience which is built, and tailored, for mobile. The UK is leading the rest of Europe in terms of site optimisation, with 64% of the top 100 UK brands with a mobile website (compared to a European average of 54%); however this means that 34% are yet to capitalise on the mobile consumer.

There are lots of brands in the UK doing great things on mobile, and they have been highlighted in a series of mobile audits that the IAB UK has conducted. The audits take an in depth look at the top 50 UK advertisers in different sectors (Retail, Travel, Finance, FMCG), and look at a number of different mobile measures including mobile optimised sites, apps, and mobile optimised search.

There are, however, still some missed opportunities. The Mobile Retail Audit found that the majority of retailers that had developed a mobile app, had developed one that you could not transact on. Furthermore, the Mobile Finance Audit found that of the finance brands that have optimised their sites, the majority still have a data capture page that isn't optimised.

These missed opportunities are only 'missed' if nothing is done to change them. As mobile continues to grow, it's critical that UK businesses embrace this growth and view mobile as an opportunity to further engage with their customers.

*comscore, 3 month average, April 2014

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

The IAB UK has conducted an Agency Snapshot Study, annually, since 2008 which gives an insight into current knowledge surrounding mobile advertising and uptake within today's media climate. The study looks at barriers to entry, as well as agency's understanding of mobile advertising.

The results of the 2013 study found that whilst general understanding of mobile is increasing within agencies, there are some key areas which need to be addressed.

Agencies felt they had the least understanding in responsive web design, mobile privacy and real time advertising on mobile. Agencies also felt that in order to increase mobile ad spend the industry needs to educate clients, provide case studies, and improve tracking and measurement.

The IAB UK is dedicated to educating advertisers and agencies on every aspect of mobile advertising, and has a full outreach programme to showcase the creative possibilities that mobile offers, as well as to promote best practice.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

Events

Mobile Engage: Mobile Engage is the IAB UK's flagship mobile event with over 600 delegates attending the day. 2014 marked the 5th year anniversary of the event, which had speakers including Facebook, Twitter, Google, and Tesco.

To read a roundup of Mobile Engage click here, and to watch a video review click here.

Research

Mobile Audits: The IAB UK has conducted a series of mobile audits (Retail, Travel, Finance, FMCG) to understand how brands have adapted to the mobile movement.

The audits take an in depth look at the top 50 UK advertisers in different sectors, and look at a number of different mobile measures including mobile optimised sites, apps, and mobile optimised search.

The audits are a great benchmarking tool, and highlight where advertisers have embraced mobile, as well as where some are still getting to grips with it.

Upcoming audits – Technology and Telecoms (Q3 2014), Autos (Q4 2014).

European Mobile Optimised Site Study: In April 2014 the IAB UK launched the first European Mobile Optimised Site Study, which looked at the top 100 advertisers across five EU countries and checked if they had a mobile optimised website.

Media Owner Sales Techniques: The IAB UK has recently conducted (June 2014) a piece of research investigating the how digital display is being traded in the UK (Media Owner Sales Techniques). The study found that 28% of the total market is being traded programmatically. However, if you look specifically at the way that mobile is traded that number rises to 37%.

Mobile and other media (release date – Q3 2014): The IAB UK is currently undertaking a programme of research to show how mobile works in conjunction with more traditional media. The ultimate goal behind this is to demonstrate to campaign planners that consumers often respond via their mobile after seeing an advert via traditional media, so it is therefore important to ensure that a mobile element is included within a media plan.

European Agency Snapshot Study (release date – Q4 2014): As a follow on from the 2013 Agency Snapshot Survey, the IAB UK is planning on broadening the project to take a more European focus.

The research will look at agency perceptions towards mobile advertising, and will gather data from five European countries.

Education

The Big Mobile Handbook for Brands (release date – 15th October, 2014): The Big Mobile Handbook for Brands will be focus on how brands can use mobile to further engage with their customers.

The handbook will cover four key areas – '*Effective Mobile Advertising*', '*Proving the Value of Mobile*', '*Mobile Customer Experiences*', '*The Future of Mobile Marketing*'.

2013 handbook – *The Big Mobile Shopping Handbook*

2012 handbook – *The Big Mobile Handbook*

Post click tracking FAQ document (release date – Q3 2014): The mobile post click tracking FAQ document aims to make it easier understand the way we can track a user journey after they click on an ad on a mobile device. The booklet is aimed at people who both buy and sell mobile advertising and need to understand how to track it, but are not necessarily technical experts. The booklet is an output of the IAB UK's Mobile Ad Tech Working Group, who worked together to address the frequently asked questions in this field.

3 x mobile workshops: The IAB UK is dedicated to educating the industry about all things mobile advertising. With this in mind, three mobile specific workshops are planned in for 2014.

2 x Maximising mobile for publishers

1 x Mobile programmatic workshop

NORTH AMERICA

Canada

Mobile Ad Revenue:	$240 Million ($Cdn)[1]
Main mobile network operators:	Bell, MTS, Rogers, SaskTel, TELUS, Wind, Videotron, Public
Mobile network technologies:	HSDPA (3G), UMTS (3G), LTE (4G), WiMAX (4G)
Mobile voice subscribers:	27.6 million – Total Subscribers[2]
Mobile data users:	17,975,000 - Smartphone[3]
Does your IAB have a mobile committee/council/group?	IAB Canada Mobile Committee

[1] Source: IAB Canada 2012 Actual + 2013 Estimated Canadian INTERNET Advertising Revenue Survey (Sept 18, 2013).

[2] Source: CWTA – Canadian Wireless Telecommunications Association (main operators, total subscribers: Q4, 2013)

[3] Source: comScore MobiLens, March 2014, Persons Aged 13+

Open-Ended Questions

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

The mobile market in Canada continues to grow and currently sits at 75% smartphone penetration among the mobile user base (comScore Digital Future in Focus 2014). Advertising revenue directed to mobile is on the rise, however not in proportion to mobile adoption by consumers. As video and programmatic become more pervasive on mobile there will be more dollars invested in this space

How important is each of the following for your members' businesses or strategies (rank in order or importance):

5. **Messaging (SMS or MMS):** Has been declining in importance due to the alternatives available through smartphones
4. **Mobile video:** As the size of the mobile screen become larger, consumers are more receptive to watching video content on these devices; it is a personal experience that is sometimes shared
3. **Mobile web:** Relatively important as more content is made available by publishers and brands and higher penetration for HTML5
2. **Mobile app:** If a brand would like to engage consumers on an ongoing basis, mobile apps become critical in engaging consumers frequently
1. **Mobile search:** As mobile devices become more pervasive, consumers are increasingly engaging with these devices to get more out of them, offering an opportunity to engage consumers

Smartphones

Smartphones are replacing other digital devices for a number of tasks including email, video, shopping, mapping etc. It's on its way to become the controller of other devices within the household

Tablets

A distinct device that is used more at home than on the go and used as complement to other traditional media e.g. television. As smartphones become larger and tablets become smaller the distinction between these two devices become blurred

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

The biggest opportunity in Canada for mobile is video and programmatic as consumers increasingly use their smartphones for more than talking, texting and email.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

Creating and promoting content across mobile devices, irrespective of their form factor. There are solutions (Responsive Design) however implementing these will take some time and resources from all the stakeholders in the ecosystem.

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

The IAB Canada Mobile Committee is working on a number of initiatives to drive the industry forward

- Working on mobile standards that will reduce the barriers to participate in the ecosystem – like responsive design (HTML5) and we are working with the IAB in the U.S to share best practices and learning
- Webinars to educate stakeholders to embrace mobile with a Canadian perspective
- Held a mobile event with a sponsor earlier in the year to promote the benefits of mobile
- We continue to track mobile/tablet revenues annually, in the IAB Canada Internet Advertising Revenue Survey

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Mexico

Mobile Ad Revenue (2013):	$683 Million Pesos (USD $52.99 Million approx.) in 2012 2013 is not available yet, study in progress[1]
Main mobile network operators:	Telcel, Movistar, Nextel, Iusacel, Unefon
Number of mobile voice subscribers:	105,005,729[2]
Number of mobile data user:	14,451,986[3]
Availability of 4G:	-
Smartphone penetration rate:	26.3 million smartphone users 39% mobile phone users[4] **Smartphone user share, Q4 2013** Android: 52.3% RIM: 16.3% iOS: 13.4% Windows phone: 12.4% Symbian: 5.4%[5]
Does your IAB have a mobile committee/council/group?	The IAB Mexico Mobile Committee meets once a month (every third Tuesday). As with other Committees in IAB Mexico, it has a president and vice president who work together with IAB team to define an agenda and a working plan regarding education, best practices, research and other activities.

[1] Source: - IAB Mexico Mobile Ad Spend Study 2012 [with PwC] (September 2013): http://www.iabmexico.com/inversion-comunicacion-mobile-mexico
- Infographic: http://www.iabmexico.com/infografia-estudio-inversion-mobile
- IAB Mexico Mobile Ad Spend Study 2013 [with PwC Mexico] will be ready in August 2014.

[2] Source: COFETEL (December 2013) http://siemt.cft.gob.mx/SIEM/#!prettyPhoto/47/

[3] Source: COFETEL (June 2013) http://siemt.cft.gob.mx/SIEM/uploads/0e6397_apacndice-ejecutivo-12-09-13pdf.pdf

[4] Source: eMarketer, May 2013

[5] Source: April 2014 http://www.the-ciu.net/index.htm

Open-Ended Questions

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

Mobile devices are transforming the way Mexicans relate to the world. The penetration of smartphones in 2013 was 39%, increasing 17 points from the previous year (22% in 2012), while the possession of cell phones rose to 87% from 78%, indicating a migration from basic to more advanced devices. Also, possession of tablets increased from 6% in 2012 to 24% in 2013. Mexican users have two devices in average, and those with tablets, laptops or MP3 players or games usually have 3 devices (IAB Mexico Mobile Consumption Study 2013).

In 2013, the effect known as *second screen* is relevant. 44% of users watch TV and surf on the Internet at the same time, mostly using social networks (84%) and searching information (63%). Also, 63% of Internet users visit sites advertised on television, of which 26% do it at the moment and 74% do it later. (IAB Mexico Media Consumption Study 2014).

There was an increase and diversification in the use of mobile devices, which strengthened the experience of Mexican users. This is an opportunity to increase the importance of mobile devices for communication with brands, which consumers don't reject, but where there do exist accessibility barriers. In 2013, 60% of mobile device users declared they receive advertising on their mobile devices and 57% said they would like to receive advertising on their mobile device in exchange for some benefit (IAB Mexico Mobile Consumption Study 2013).

How important is each of the following for your members' businesses or strategies:

According to the IAB Mexico Mobile Consumption Study, November 2013:

Messaging–based ads or marketing: 60% of respondents declared they receive advertising on their mobile devices and SMS is the most recalled ad type (48%).

Mobile web: 61% of mobile phone users perform activities related to the Internet on their devices, with the most important ones being:

- Social Media: 67%
- Emailing: 50%
- Searching for information: 49%
- Chat: 31%
- News: 29%

Mobile apps: 77% of mobile device users that access the Internet from their device have downloaded apps. On average mobile device users download 3 to 4 applications, mostly entertainment, social media and gaming.

Mobile video: 35% of mobile device users watch videos on them.

Location-based advertising: 63% of mobile device users that access the Internet from their device have used a GPS or a geolocation service. On average Mexicans use two services each, with the following leading the market: Google Maps (92%), Facebook places (15%), Guia Roji (11%), Foursquare (7%) and Waze (7%).

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

The increase and diversification in the use of mobile devices is an opportunity for brands to interact with their audience and create a better experience for them. One of these opportunities is to maintain Responsive Design-based web sites, so that users can access the same content on all their devices at the place and time they want. Mobile is transforming the way consumers make purchase decisions.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

We have to stop seeing mobile as something apart from our advertising strategies. The biggest challenge is to create multi platform strategies that integrate different media to communicate a message to reach our audience.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

Research:

- This year we will publish the third edition of **Mobile Ad Spend Study** as a very important measurement of the size of the mobile industry and this year we will be able to compare the results to 2012.
- Also, IAB Mexico will publish the seventh edition of **Media Consumption Study 2015**, which explores mobile usage, perception and habits of Internet users in Mexico.

Best practices:

- **Whitepapers:**

IAB Mexico published in 2012 the **Mobile Marketing Handbook**. This whitepaper is a guide for advertisers, agencies and media to discover the opportunities and capabilities of mobile marketing in Mexico. (http://www.iabmexico.com/MobileMarketingHandBook)

This year there are 2 whitepapers in development taking into account those developed by IAB UK as a starting point, translating the content and adapting it for the Mexican market:

- How to Get Started in Mobile.
- How to Be Creative in Mobile.

- **Mobile Ecosystem**

Goal: This project started from the beginning of the IAB Mexico Mobile Committee with the goal of presenting a complete picture of all the key pieces that comprise mobile marketing in Mexico.

- **Mobile Success Case**

Goal: This year, one of the projects of the Mobile Committee is to document a success in Digital Marketing using Mobile to achieve the objectives in a campaign. Ideally, we will focus on two mobile campaigns, branding and performance.

Education and Events:

- **Interactive Marketing Diploma.**

This course has a module dedicated to Mobile Marketing (12 hours) and is currently being taught to the 18th generation.

- **Digital Day: Mobile Marketing Basics.**

Goal: Identify the elements of the ecosystem and the tools involved in mobile marketing campaigns.

Digital Days are 8-hour training days on specific topics. There will be a day dedicated to Mobile Marketing with approximately 25 attendants, which translates into an impact of 200 training hours.

- **Innovation Day: Mobile.**

This is a full day event that is divided in two sections. In the morning there are conferences with international speakers that provide an strategic perspective on the theme and in the afternoon the attendants have the opportunity to attend different workshops to have a closer experience with different tactics and tools.

United States of America

Mobile Ad Revenue:	$7.1 billion[1]
Main mobile network operators:	Verizon, AT&T, T-Mobile, Sprint
Mobile network technologies:	3G, 4G increasingly available, WiFi in public places
Mobile voice subscribers:	345.2 million as of June 2013[2]
Mobile data users:	287.4 million 3G/4G subscriptions as of June 2013[2]
Does your IAB have a mobile committee/council/group?	In the US, the IAB has a Mobile Marketing Center of Excellence (with a separate membership fee and Board of Directors) along with a Mobile Committee, Tablet Committee, and Local Committee. There are also a number of working groups focused on specific mobile initiatives or topics.

[1] Source: IAB Internet Advertising Revenue Report, released April, 2014. www.iab.net/AdRevenueReport

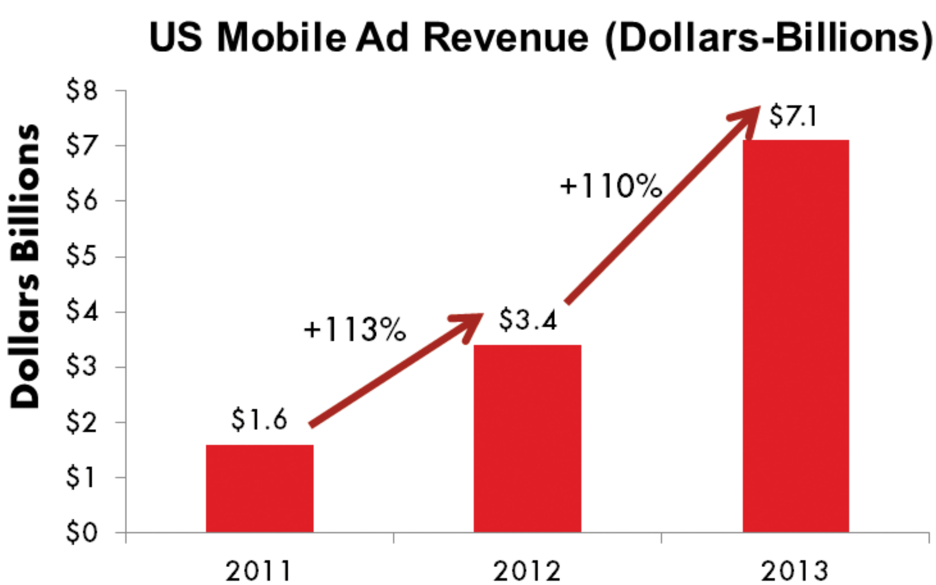
[2] Source: Paul Lambert, Informa, cited in MobiThinking, www.mobithinking.com/mobile-marketing-tools/latest-mobile-stats/a#usasubs

Open-Ended Questions

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

Mobile advertising continues to expand rapidly in the US. For 2013, US mobile ad revenue totaled $7.1 billion, an increase of 110 percent relative to 2012. However, many media companies are challenged by mobile: their mobile audiences are growing at a pace that far exceeds their mobile ad revenue, creating challenges to revenue and profitability. And marketers are still finding their way in the mobile world, learning how to create, deliver, and measure strong mobile ad campaigns.

US MOBILE AD REVENUE MORE THAN DOUBLED IN 2012 AND 2013

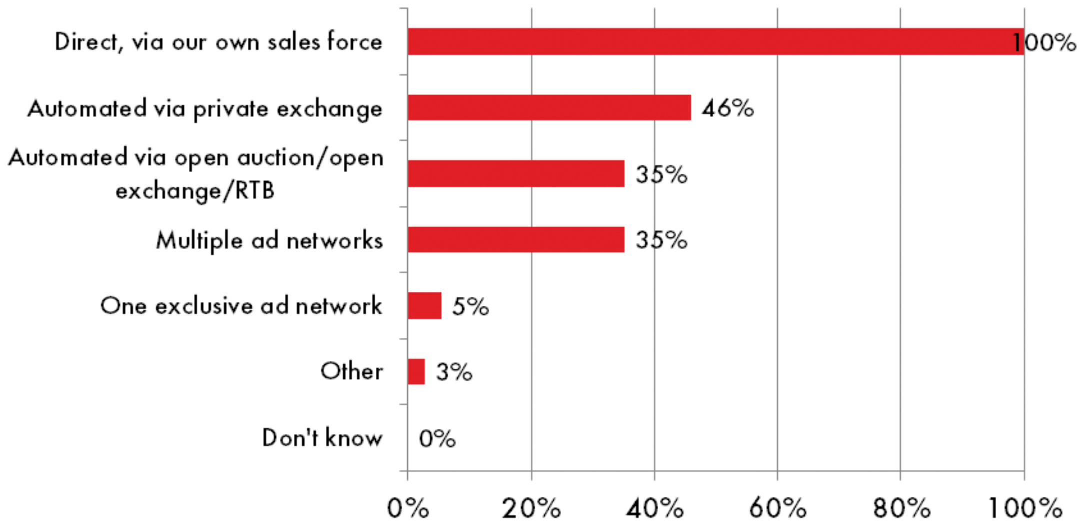


Source: IAB Internet Advertising Revenue Report, 2013, 2013 Full Year Results, Released April 2014

How important is each of the following for your members' businesses or strategies (rank in order or importance):

In 2014, the key buzzwords for the US mobile media industry are "**programmatic**" and "**native**." Media companies are moving quickly to programmatic/exchange solutions to sell mobile inventory efficiently (46% are selling mobile display inventory via private exchanges according to a recent IAB member survey). And at the same time, they are looking for ad types that can overcome the size and effectiveness limitations of the 320x50 banner, including in-feed, sponsorship, and other "native" ad formats.

FOR MOBILE DISPLAY, EXCHANGES ALREADY BECOMEING A MAJOR FORCE



Question: Which of the following sales channels does your company currently use to sell its mobile DISPLAY inventory? Please chek all that apply.

Source: IAB Mobile Ad Seller Survey, April 2014, =37

US advertisers and media companies have also shown strong interest in mobile video, as a compelling ad format that works well on small as well as larger screens.

Mobile search is extremely important to consumers, particularly in the local context. However, a relatively smaller number of companies operate in the mobile search arena.

Messaging is not very important in the minds of marketers or media companies in the US—it plays a role for customer service, but is not a major advertising revenue stream.

In terms of **apps** and **mobile web**, there continues to be great interest in understanding how consumers use both of those. Flurry reports 86% of mobile internet time is spent in-app, while comScore reports a similar 80%. However those stats overlook the fact that much in-app time is spent on websites (using in-app browsers), and that consumers generally move fluidly back and forth between apps and mobile web. The IAB is commissioning a new piece of research to examine ad opportunities and consumer behavior around apps and web more closely, which should be published in late 2014.

In terms of devices, media company interest is concentrated on **smartphones** as a distinct, challenging digital medium. Many companies are using responsive web solutions to adapt their PC websites to work well on **tablets**, and letting that be their tablet strategy. The huge and growing smartphone audience is more challenging to reach well and to monetize, requiring a more specialized and customized approach to ensure success.

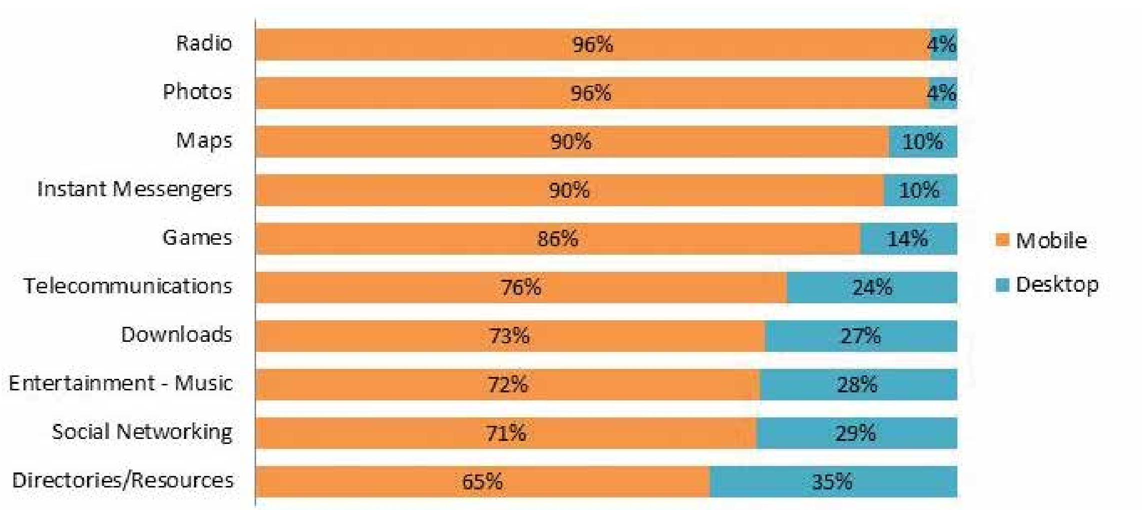
What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

Mobile remains a complex, dynamic landscape, but the good news in 2014 is that between standardization (including standards driven by the IAB) and technical solutions from innovative vendors, it is getting easier to create ads and content that really can scale so that they look good and perform consistently across a wide variety of screen sizes. As the technical hurdles are overcome, we're seeing designers really starting to think about creating great mobile experiences for consumers, benefitting everyone in the industry.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

Media companies in the US are finding themselves "mobile first" before their ad sales forces or business models are really ready for that. That is, for more and more types of digital media, more than 50% of media time spent now comes from mobile (see the chart from comScore, below). While mobile revenue is growing rapidly, it is not keeping pace with the audience growth. This reduces revenue per user, and creates pressure for businesses to either become more efficient (hence the interest in mobile programmatic ad buying) or persuade marketers that mobile merits ad rates commensurate with PC digital—an argument that has been challenging to make.

SHARE OF TIME SPENT BY PLATFORM AMONG SELECTED LEADING CONTENT



Source: comScarre Media Metrix MultiPlatform, U.S., May 2014
www.comscore.com/Insights/Blog/Major-Mobile-Milestones-in-May-Apps-Now-Drive-Half-of-All-Time-Spent-on-Digital#imageview/1/

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

MOVING MOBILE MAINSTREAM: CORE MOBILE CENTER PRIORITES

Source: IAB Mobile Marketing Center of Excellence

The Mobile Marketing Center of Excellence is having a busy year in 2014. Among the highlights so far:

- Launched "Make Mobile Work," a new ongoing initiative to promote to marketers the importance of building all ad campaigns with cross-screen, HTML5-based ad creative.
- Published "Privacy and Tracking in a Post-Cookie World," a first look at technologies for delivering relevant, accountable advertising across mobile and desktop screens.
- Held IAB's fifth annual Mobile Marketplace, with record-setting, sold-out attendance.
- Published research demonstrating the effectiveness of IAB "Mobile Rising Stars" ad units.
- Released a new compliance test for the IAB's MRAID standard, as well as best practices for ad designers and others working with MRAID, and started a project to establish definitive best practices for using MRAID in tandem with the IAB VPAID standard.
- Released a Mobile Video Buyer's Guide.
- Worked with IABs around the world to field a global look at mobile's role for fans of the 2014 FIFA World Cup.
- Fostered industry conversation via numerous town halls, round table conversations, and other live events.

And to come before the end of the year:

- New research on apps and mobile web usage patterns and ad opportunities
- A deeper look at mobile location technologies, how they work, and how to address privacy concerns
- The beginning of the industry-wide "Making Measurement Make Sense" (3MS) project's review of mobile display and video, with an eye to creating mobile viewable impressions

Argentina

Mobile Ad Revenue:	2013 - Estimated USD 13 M[1]
Main mobile network operators:	Claro (34.5%), Movistar (30%), Personal (32%)
Number of mobile voice subscribers:	53M
Number of mobile data users:	
Availability of 4G:	-
Smartphone penetration rate:	31% (OurMobilePlanet)
Does your IAB have a mobile committee/council/group?	Yes

[1] Source: eMarketer + Other

Open-Ended Questions

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

Mobile search and display are growing fast, especially driven by performance advertisers, pure players like Despegar & Mercado Libre, with regional hubs based in Argentina. Google & Facebook are concentrating mobile ad sales, with app targeting main driver for Display growth.

How important is each of the following for your members' businesses or strategies:

1. **Mobile web**
2. **Mobile apps**
3. **Mobile video**
4. **Messaging–based ads or marketing**
5. **Location-based advertising**
6. **Programmatic/exchange-based ad buying in mobile**

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

The biggest opportunity for mobile in Argentina is mobile search and display in apps.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

There are four main challenges facing mobile in Argentina this year:

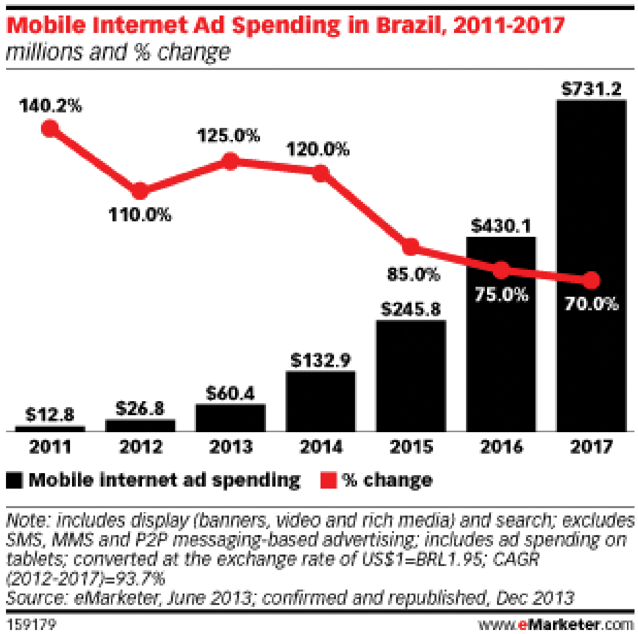
- Lack of talent/knowledge to implement successful campaigns and select the adequate media/formats.
- Lack of knowledge of html5 / app development in media companies and agencies, preventing advertisers from offering good quality sites / apps that reflect their value proposition.
- Mobile continues to grow super fast, +100% YoY, and formats still changing, preventing advertisers from focusing on the basics rather than in the next shiny thing.
- Lack of understanding of mobile as key part of a multiscreen strategy rather than a silo left to specialists.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

IAB Argentina's main mobile project this year is our planned Mobile Executive Program with Universidad de Palermo.

Brazil

MOBILE AD REVENUE 2013



Main Mobile Network Operators

OPERATOR	OWNER	# SUBSCRIBERS (´000)	MARKET SHARE
VIVO	TELEFONICA	78.465	28.68%
TIM	TELECOM ITALIA	73.917	27.02%
CLARO	AMÉRICA MÓVIL	68.749	25.13%
OI	AG, LaFonte, BNDES, Fundos e Portugal Telecom	50.580	18.49%
CTBC	CTBC	1.058	0.39%
NEXTEL	NII Nextel	657	0.24%
SERCOMTEL	Prefeitura Londrina/Copel	62	0.02%
Others	Porto Seguro & Datora (MVNO)	104	0.04%

Source: ANATEL – Agência Nacional de Telecomunicações. Status 1°Quarter 2014

Number Of Mobile Voice Subscribers

Number of Mobile Subscribers May 2014 :

- 275.5 Million;
- 136 cell phones / inhabitant

OPERATOR	OWNER	# SUBSCRIBERS (´000)	MARKET SHARE
VIVO	TELEFONICA	78.465	28.68%
TIM	TELECOM ITALIA	73.917	27.02%
CLARO	AMÉRICA MÓVIL	68.749	25.13%
OI	AG, LaFonte, BNDES, Fundos e Portugal Telecom	50.580	18.49%
CTBC	CTBC	1.058	0.39%
NEXTEL	NII Nextel	657	0.24%
SERCOMTEL	Prefeitura Londrina/Copel	62	0.02%
Others	Porto Seguro & Datora (MVNO)	104	0.04%

Source: ANATEL – Agência Nacional de Telecomunicações.

Number of Mobile Data Users

May 2014 = 123.6 Million

- 3G (WCDMA) = 114 Million ;
- Modens (USB, etc) = 6.8 Million;
- 4G (LTE) = 2.8 Million.
- Penetration = 44.9% of the total of mobile phones.

Source: ANATEL – Agência Nacional de Telecomunicações.

Availability of 4G

Covered Cities = 114 = 38% of the population

Smartphone Penetration

% Smartphones / cell phones

- 2013 -> 52,4%
- Jan + Feb 2014 -> 64,1%
- For 2014, the forecast is 66 million mobile phones sold (47 million smartphones and 19 million feature phones).

Source: IDC and Abinee: http://www.teleco.com.br/celprod.asp

Open-Ended Questions

Does your IAB have a mobile committee/council/ group?

IAB Brazil has a mobile commitee. More details:

http://iabbrasil.net/portal/portfolio/mobile-comite/

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

As Brazil gets close to exceeding 100M smartphones in the country, and mobile apps are part of people's lifestyles, it's attracted a lot of interest and attention towards mobile from advertisers, media companies, and businesses in general. However, mobile's mindshare in Brazil still translates to pocket change and execution remains at a slow pace. The good news is we're seeing signs that the advertising market in Brazil is getting up to speed with the mobile audience.

A series of studies named "Mobility Index" are being released in Brazil. These studies aim to measure the level of mobile adoption among the Brazilian brands. The first release was a broad analysis of the market conducted in the first quarter of 2014. It evaluated brands belonging to the 300 largest advertisers in Brazil. This study found that 64% of those brands hardly had a mobile presence. As a matter of fact, 32.4% had no mobile presence at all. Only 16.4% of the brands studied had what is considered a structured mobile presence - where mobile is perceived as a relevant part of its strategy and execution as well.

The economic segments where mobile had a larger presence were Telecoms, Financial Services, Real Estate, and Consumer Electronics. The worst performers were brands in the Consumer Packaged Goods (CPG) and Fashion sectors.

Regarding the different mobile platforms, there's no clear winner, with 41.8% of brands having a mobile site and 40% an iOS app, while Android had a penetration of 37.1%.

How does this development activity translate to advertising? We found that in the sample we surveyed 28% of the brands had already made some kind of mobile advertising campaign in the last 12 months.

It's important to note that most of the activity around mobile has been happening recently - even among the best performers. This points to a possible acceleration of the market and increased activity around development, and a bigger investment in mobile advertising as brands start competing for downloads.

How important is each of the following for your members' businesses or strategies:

Messaging–based ads or marketing

Mobile web

Mobile apps

Mobile video

Location-based advertising

Programmatic/exchange-based ad buying in mobile

We believe that all strategies are important and may be complementary. It depends on the objectives and target to be achieved. It is important that companies consider all options to assess what will yield the best results. Planning must consider a multiplatform, multichannel approach. The IAB promotes best practices, formats and content to support companies in their planning.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

Major events create scenarios for advertising shifts. Brazil recently hosted the 2014 World Cup, and the upcoming election will be another big 2014 event that should move the advertising market.

We believe that the biggest opportunity is to ensure that brandsj60

consolidate their presence and increase their traffic on Mobile. Consolidating strong mobile strategies in the closing months of 2014 will be essential to starting 2015 with a competitive advantage.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

Media companies and advertisers should better organize their approaches to mobile metrics so they can measure Mobile KPIs with more accuracy. They should use tools that assist in this process, generate important information, and allow evaluation and comparison of the market. With better information, companies can establish more consistent planning. IAB Brazil is supporting important initiatives such as the comScore's Mobile Media Metrix , which will generate reports on the traffic to the main Brazilian mobile properties. That also should help in developing a first Brazilian mobile ad spend report of IAB.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

The main objectives of the IAB Brazil Mobile Committee to the 2014 are:

Education: evangelize and support the market with standardized formats, rules, best practices, continuous updating of information, and training of professionals and students;

Content: constant updating of information on the global mobile market distributed through various communication channels;

Events: we impact the market with events that bring together the all players in the segment, to promote networking and accelerate mobile market development.

We conduct ongoing Webinars, training sessions, and articles, and we held a Mobile Day event in April in conjunction with MMA.

We are supporting Mobile Media Metrix, comScore's report to generate mobile audience data with deliverables by the end of the year;

We will hold one more mobile event in November.

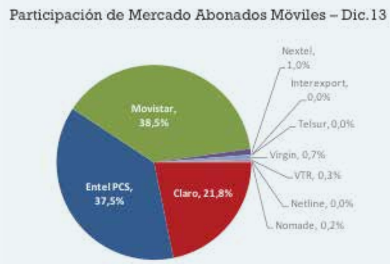
Chile

Mobile Ad Revenue:

In Chile, there is still no report of investment exclusively for mobile platforms.

Main mobile network operators:

The market share is distributed between three operators.

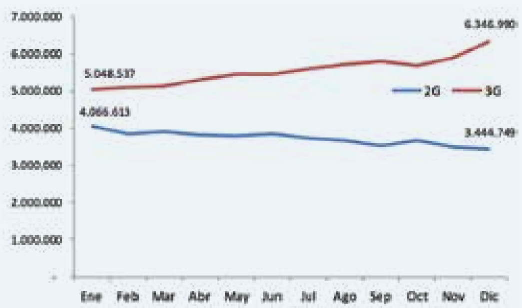


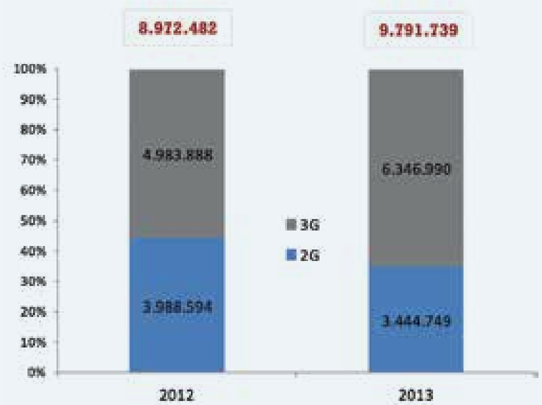
Number of mobile voice subscribers:

In Chile, the penetration of mobile phone subscribers, has a rate of 135%.[1]

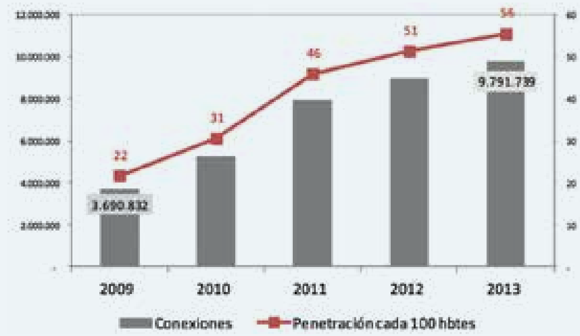
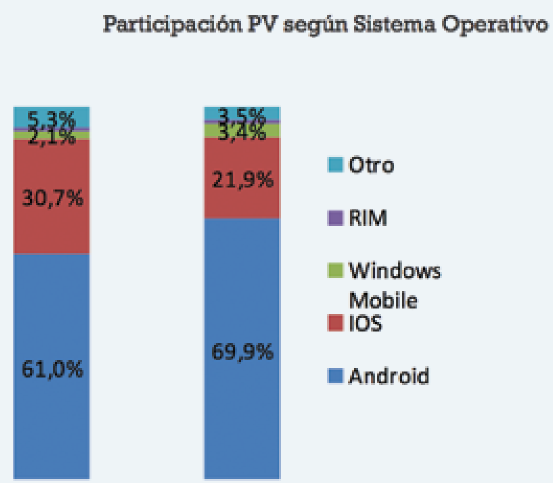
Number of mobile data users:

We have 9.79 million suscribers in 2G and 3G connections.





Which means a penetration of 56% in the country.[1]

	
Availability of 4G:	The operators do not report on the 4G connections, however CISCO estimated the 4G connections at 0.2% and its traffic by 1.9% over the total.
Smartphone penetration rate:	Smarthphones penetration is growing at a very high rate, 78.54%.[2]  
Does your IAB have a mobile committee/council/group?	Chile has an IAB mobile committee since 2011, whose main mission is assessing the status IOS ha seguido perdiendo participación dentro de los sistemas operativos, siendo superado por lejos por Android.

[1] Source: Department of Telecommunications, Ministry of Transport and Telecommunications of Chile.

[2] Source: IDC

Open-Ended Questions

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

The development of mobile advertising and marketing has shown big growth in Chile in the last two years. In 2012 we saw the first campaigns that used mobile channels as part of their strategy, and 2013 was the year were mobile advertising got stronger and started to be a channel considered by the big agencies as a fundamental part for its campaigns.

Although it still does not represent a big percentage of digital investment, we can affirm that its growth is consistent and we hope that in 2014 it reaches an important level compared to previous years.

How important is each of the following for your members' businesses or strategies:

Messaging–based ads or marketing: Very important. The volume of SMS of campaigns paid by companies and brands has increased a lot in recent years and today is one of the most important mobile channels for companies.

Mobile web: Important. Every day more companies develop mobile web portals and those with higher traffic have begun to offer advertising opportunities for mobile phones in these portals.

Mobile apps: Apps have been less important to date. Only this year are companies discovering the opportunities provided by apps in advertising campaigns, but its development is still slow and we hope that in 2015 we have faster development of apps in advertising campaigns.

Mobile video: Very important. Everyday mobile video is often used in advertising campaigns and it is expected that their use continue to grow within the next years.

Location-based advertising: Very important. Advertising that uses geo-referencing is one of the most used elements in advertising campaigns in 2013 and 2014.

The function of searching by geo-referencing from smartphones has developed a whole new world of possibilities for agencies and brands to do mobile and advertising campaigns.

M-commerce and mobile payments: Mobile commerce is not currently very important. In Chile we are just starting, very slowly, and so far there is not major app developments or campaigns that include mobile payments.

Since 2013 apps and transactional web sites have increased in order to get to benefits, discounts, exchange of points, and other services, both for loyalty programs as for advertising campaigns, but most of them do not include mobile payment.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

The big opportunity here is the growth and consolidation of this new market or channel for digital advertising, which has been consolidating since the end of 2013.

It is expected that by the end of the year in Chile, access to web portals from mobile phones will surpass access from computers. The increased volume of Smartphone users who have mobile data plans and who access mobile web portals and applications from their phones has driven that growth since the end of 2013. This mobile channel represents a significant percentage of hits and that increases the potential to make important campaigns on mobile devices.

Having a larger number of visits from mobile phones enables brands to use these mobile platforms as an important part of their digital marketing strategies.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

The main challenge is to make brands believe in this mobile channel and include it on their strategic plans as an important channel and not as a less important item.

In Chile, 70% of web portals are still not optimized for mobile devices and there are many brands that still do not believe that this is an important channel for them, so they continue to spend very little budget on mobile channels. The challenge is to increase investment on mobile.

Therefore, advertising agencies need to understand the development of the market and to offer attractive and profitable mobile campaigns to their customers.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

As IAB Chile, we have a committee that has been working for many years on mobile topics in Chile. As part of the work it does, we have the following items:

- One Mobile Digital Day per year. This is an event that seeks to showcase the latest trends in technology, marketing, and mobile advertising.
- Courses and degrees related to mobile marketing with some universities.
- One study/survey about mobile market in Chile every year.
- One study/survey about the percentage of access to the most important web portals in Chile from mobile devices. This is the first year that we are going to conduct this study.

Colombia

Mobile Ad Revenue:	US$3,400,000[1]
Main mobile network operators:	Claro (65% market share), Movistar (23% market share), Tigo (10% market share)
Number of mobile voice subscribers:	51,594,619[2]
Number of mobile data users:	4,827,376[3]
Availability of 4G:	No information
Smartphone penetration rate:	33% smartphone penetration. Divided by OS: http://gs.statcounter.com/#mobile_os-CO-monthly-201306-201405
Does your IAB have a mobile committee/council group?	Yes

[1] Source: IAB Colombia/PWC 2013 revenue report

[2] Source: http://colombiatic.mintic.gov.co/estadisticas/stats.php?id=85

[3] Source: http://colombiatic.mintic.gov.co/estadisticas/stats.php?id=14

Open-Ended Questions

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

Mobile advertising/marketing in Colombia is growing, has a great potential, but it´s still small, no more than 3% of the market.

How important is each of the following for your members' businesses or strategies:

Messaging–based ads or marketing: Important

Mobile web: Important

Mobile apps: Important, beginning to grow

Mobile video: Important, beginning to grow

Location-based advertising: Less important

Programmatic/exchange-based ad buying in mobile: Not yet, but beginning

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country over the rest of 2014?

I think content, video and apps will be the great mobile opportunities for media companies or advertisers in Colombia.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country over the rest of 2014?

The biggest challenge is to lead advertisers to this platform, and to combat the somewhat low level of technological development in our country.

What is your IAB doing in the mobile area in 2014? Any research, events, papers, webinars, or other things planned or recently completed?

We are doing research, holding digital days with mobile as the principal subject, and working with our commission.

Ecuador

Mobile Ad Revenue:	N/A
Main mobile network operators:	**Claro 68.35%** **Movistar 29.44%** **CNT 2.21%**
Mobile network technologies:	3G, 4G and wi fi
Mobile voice subscribers:	17,300,000 (included plans and prepaid)[1]
Mobile data users:	2,700,000[1]
Does your IAB have a mobile committee/council/group?	Yes

[1] Source: Supertel (Superintendencia de Telecomunicaciones)

Open-Ended Questions

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

In spite of the fact that mobile advertising has had a low share of investment, it is in a constant state of growth due to the high penetration of mobile and the development of 3G and 4G technologies and connectivity. In addition, brands have understood the evolution of customers' connectivity and the increase of mobile usage in their lives.

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

Integration of multi screen usage for consumers in advertising and promotion strategies

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

Effectiveness in connectivity

App differentiation (there's a lot of competition)

Video integration with mobile

Mobile friendly / exclusive campaigns

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

Mobile usage and consumer habits study 2014

Peru

Mobile Ad Revenue:	US$ 1,400,000 (3% of 2013 total revenue)[1]
Main mobile network operators:	Movistar, Claro.
Mobile network technologies:	Mainly 3G. 4G currently in Lima and pitched in some cities within the country. Also Wifi.
Mobile voice subscribers:	12,000,000 cellphone users 2,900,000 (smartphones)[2]
Mobile data users (if known):	680,000 [2]
Does your IAB have a mobile committee/council/group?	Not at the moment

[1] Source: IAB Internet Advertising Revenue Report conducted by PricewaterhouseCoopers (PWC) Perú 2013

[2] Source: OSIPTEL (Supervisory Agency for Private Investment in Telecommunications)

Open-Ended Questions

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

As these numbers show, in Peru we are still behind in cell users and smartphone penetration as compared to more developed countries. One of the main reasons for not having a mobile is the economic factor. 45% of people who do not have one say it is because they are very expensive, according to the latest annual survey by OSPTEL, Perú's Supervisory Agency for Private Investment in Telecommunications.

The same applies to data plans, more access and cheaper plans from operators are needed for widespread access to the mobile Internet.

It is clear that mobile marketing is just starting to develop and it is due the fact that although companies and brands are making efforts, they are still young and inexperienced. A key point in the analysis of the current state of mobile marketing is the mobile content offerings available in the market. There are very few companies that provide mobile-optimized content. There is a gap between the ever-increasing demand for mobile content versus supply.

How important is each of the following for your members' businesses or strategies (rank in order or importance):

In order from most important (5) to least important (1):

5. **Mobile search**

4. **Messaging (SMS or MMS)**

3. **Mobile web**

2. **Mobile apps**

1. **Mobile video**

1. **Smartphones**

1. **Tablets**

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

Today advertisers are not optimizing their spending on TV commercials with internet presence. The big opportunity for brands is to achieve greater range, higher frequency and higher return on their campaigns with efficient online planning schedule.

This means giving greater importance to digital video and recognizing it as a true enhancer digital strategies.

Furthermore, applications are ideal for reaching mobile users.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

Advertisers and media companies have to generate mobile content, optimized for these devices. They are missing many opportunities and their lack of mobile content results in a bad user experience for customers or potential customers. They must be prepared for the huge demand for content via mobile that is coming.

Already the government has tendered the 4G LTE band in the country. This will allow us to improve mainly in the development of utility applications.

In the short term, marketers should enable interactivity by using SMS which remains today the most pervasive tool on phones. They should not only use it as a unidirectional communication channel but in a bidirectional manner that allows the users to participate in some kind of interaction with a brand or product.

What plans does your IAB have for mobile for 2014? Any research, events, papers, webinars, or other things planned?

Update a white paper "mobile ecosystem in Peru, challenges and opportunities" (by IAB Peru's Education Committee).

Create a mobile-specific committee by 2015

Uruguay

Mobile Ad Revenue:	$602,306[1]
Main mobile network operators:	Antel (www.antel.com.uy) / Movistar (www.movistar.com.uy) / Claro (www.claro.com.uy)
Mobile network technologies:	3G, 4G, LTE
Mobile voice subscribers:	4,995,459[2]
Mobile data users:	1,084,468[2]
Does your IAB have a mobile committee/council/group?	Not yet.

[1] Source: IAB revenue Study

[2] Source: www.ursec.gub.uy (Dec. 2012)

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

Investment in and development of mobile marketing in Uruguay is stuck. There are no proposals available from agencies with relevant, mobile-specific provisions, content and usability requirements.

How important is each of the following for your members' businesses or strategies (rank in order or importance):

From most important (8) to least important (1):

8. **Messaging (SMS or MMS)**
7. **Smartphones**
6. **Tablets**
5. **Mobile Social Platforms**
4. **Mobile search**
3. **Mobile app**
2. **Mobile web**
1. **Mobile video**

What do you think will be the biggest mobile opportunity for media companies or advertisers in your country in 2014?

For media, the mobile opportunity is to be permanently connected with the audience, and understand the needs and uses of readers on the various digital platforms.

For advertisers, the mobile opportunity is to be permanently connected with and exposed to the customer. In social, advertisers must be willing to listen to criticism of the company and its brands, and learn how to manage them.

Advertisers and media alike should get the most engaging contents on platforms where their brands can live and communicate with their target audiences.

What do you think will be the biggest mobile challenge for media companies or advertisers in your country in 2014?

For media, the biggest mobile challenge this year is to develop ways to monetize all the audience that is generated on mobile (this could include CPM, sponsorship, subscription, or downloads).

For advertisers, the biggest mobile challenge is to manage mobile communication with customers, and generate interesting content to humanize their brands.