

Monthly Research Wrap-Up (August)

Mobile Advertising and Marketing 2009 - Market analysis and forecasts 2009-2014

Companies and Markets

<http://www.companiesandmarkets.com/Summary-Market-Report/mobile-advertising-and-marketing-2009-market-analysis-and-forecasts-2009-2014-154812.asp>

This report analyses the market drivers and barriers affecting mobile advertising and marketing. It discusses the main market trends and charts the market evolution in the US and Europe. The report examines mobile advertising opportunities presented by MMS, video, TV, LBS, contextual advertising, as well as other niche possibilities.

Mobile Advertising Quietly Grows

Gartner

http://www.gartner.com/DisplayDocument?id=1147013&ref=g_sitelink&ref=g_SiteLink

Mobile advertising spending will increase in 2009, despite adversity in the overall advertising market. But don't expect a real breakout until 2011. A new Gartner report projects that mobile ad spending worldwide will grow 74% this year to \$913.5 million but not really accelerate until 2011, when advertisers are expected to boost mobile spending as part of an overall shift toward digital marketing channels. By 2013, the research firm expects mobile ad spending to surpass \$13 billion, with the Asia-Pacific region leading the way, followed by North America and Europe.

Mobile Advertising and Mobile's Position in the Internet Purchasing Experience

First Partner

<http://www.fptestingsite.com/wp-content/uploads/2009/07/mdapresentationv5.pdf>

The report includes UK market information regarding UK Internet Shopping in general and more specifically mobile advertising. FirstPartner claims that mobile advertising revenue will be worth over €950 million by 2013. The Western European market will grow at a CAGR of 50% from 2009 to 2013 and the leading country will be the UK. Key drivers will be mobile TV, the increased use of Internet on smartphones, the movement of traffic off-portal, location based services and a gradually recovering economy.

Western European Mobile Forecast, 2009 To 2014

Forrester Research

<http://www.forrester.com/Research/Document/Excerpt/0,7211,53717,00.html>

As mobile phones are now ubiquitous across Western Europe, the industry's attention has turned to the mobile Internet arena. Despite the recession, mobile Internet adoption will continue to grow significantly, with audiences tripling from 13% of Western European mobile users in 2008 to 39% in 2014. The current economic climate will lengthen handset renewal cycles, foster the development of low-cost offerings, and boost the uptake of SIM-only contracts.

U.S. Mobile Advertising and Search Market

Frost and Sullivan

<http://www.frost.com/prod/servlet/report-homepage.pag?repid=N61C-01-00-00-00&ctxst=FcmCtx6&ctxht=FcmCtx7&ctxhl=FcmCtx8&ctxixpLink=FcmCtx9&ctxixpLabel=FcmCtx10>

U.S. mobile penetration levels are currently approaching 90 percent. An increasing number of mobile subscribers are using various content services and applications on their devices, which opens up newer avenues for mobile advertising. The industry is witnessing a considerable increase in the



number of specialized companies that focus on enabling mobile advertising. Adoption of mobile advertising by the nation's largest mobile operators and innovative MVNOs is a testament to the perceived potential of the market opportunity. Smartphone app stores have further provided new opportunities in the U.S. mobile advertising and search markets.

The Communications Market 2009 (August)

Ofcom

<http://www.ofcom.org.uk/research/cm/cmr09/>

Britain's recession-hit consumers would rather cut back on eating out and holidays than give up their broadband, mobile phone and pay-TV services. Customers are looking to save money on communications and media deals but are still willing to pay up for services that enhance the experience, such as digital video recorders and mobile broadband.

Mobile Advertising - 2020 Vision

Acision and OgilvyOne

http://www.acision.com/Shared%20Documents/factsheets/MobileAdvertising_WP_2020Vision_0709.pdf

What will mobile advertising look like in 2020? A new report from OgilvyOne and messaging company Acision predicts mobile advertising in 11 years will be far more personalised as users exercise control over the types of messages they see, and when, on their handheld devices. "Mobile advertising in 2020 will be mobile directed advertising which is selected and chosen by the individuals themselves. It is the individual who will be the pivotal player in the mobile advertising domain of the future and the mobile device will be a technological representation of them," according to the study.

2009 Southeast Asia Wireless Outlook

Frost and Sullivan

<http://www.frost.com/prod/servlet/press-release.pag?docid=177455795>

Southeast Asia's (SEA) mobile subscribers are expected to hit 453.3 million by the close of this year, growing 18.4 per cent over 2008. Billings are estimated to grow by 13.6 per cent year-on-year to top US\$32 billion by year-end. New analysis from Frost & Sullivan, 2009 Southeast Asia Wireless Outlook, finds that the mobile subscriber base in the region - covering seven Southeast Asian nations - grew 36 percent year-on-year to reach 383 million users in 2008, for a corresponding mobile penetration of 72.5 per cent. By the close of year 2014, Frost & Sullivan estimates SEA's mobile subscribers to reach 606 million, growing at a CAGR (compound annual growth rate) of eight per cent (2009-2014).

AsiaBarometer Survey: Two in five Singaporeans don't SMS

National University of Singapore

http://www.straitstimes.com/print/Breaking%2BNews/Singapore/Story/STIStory_421007.html

<http://www.newasiabooks.org/node/9424>

Despite a mobile-phone penetration rate of around 130 per cent, almost two in five Singaporeans do not read or write text messages on their phones. This proportion exceeds that of people who do so daily - the category with the second-largest percentage - a study, published as a book by three



National University of Singapore (NUS) business school lecturers, found. But it is still smaller than in places where mobile-phone technology has been as widely adopted as in Singapore, such as Japan and Taiwan, where almost half of people there have never used the mobile phone to send or read text messages.

Bali Hi: 3G Comes to Indonesia

Pyramid Research

http://www.pyr.com/pr_prlst/PR081209_PPBALHI.htm

Indonesia is set for some huge growth in 3G service uptake over the next five years, and operators are taking some creative steps to build out that subscriber base, according to the latest forecast data and analysis from Pyramid Research. In its latest round of quarterly forecasts, Pyramid Research predicts that 44 per cent of Indonesian mobile subscribers will be using a 3G device by 2014, which translates to a compound annual growth rate of 54 per cent from 2008 through 2014.

Compendio Estadístico & Análisis trimestral

BNamericas – Telecomm Stats

www.bnamericas.com/store/products.jsp?sku=76E2899175&idioma=E§or=2&periodo=2009

This trimester report includes some of the most important indicators in the sector, from fixed-telephone lines to broadband penetration and the financial position of the industry leaders. The study also includes analyses on short-to-medium-term trends and a preview of operative indicators for some of the major telecommunication firms.

Mobile VAS Update: Adding Broadband and Apps to the Service Offering

BNamericas – Telecomm Intelligence Series

www.bnamericas.com/store/products.jsp?sku=7112891794§or=2&idioma=I&periodo=2009

In this report, BNamericas covers the applications that are revolutionising the industry, and charts mobile users' migration to the devices and platforms that make it happen. More importantly, 3G networks have been successfully established throughout Latin America, gradually attracting both VAS and broadband users. And although smartphones only represent 5 per cent of handset sales in Latin America, projections suggest that mobile broadband will be the key revenue driver for mobile operators in Latin America over the next few years.

Mobile Broadband in Latin America: Mobile Devices Increasing Speed (Banda Ancha Móvil en Latinoamérica: Aumenta la Velocidad de los Dispositivos Móviles)

GSA Association

http://www.gsacom.com/programs/latin_america.php4

The Global Mobile Suppliers Association's August report, a comprehensive study that monitors the level of mobile devices with the capacity to support data transmission speeds above 1.8 Mbps worldwide, focuses particularly on HSPA mobile terminals that support speeds greater than 7.2 Mbps; this is especially salient in Latin America, where 46 per cent (595 models) of mobile devices uphold those high transmissions speeds. With greater speeds, GSA reports, cell phone users in Latin



America will be able to have the best mobile broadband experience, potentially signaling an increased supply for value-added mobile services.

The Evolution of Mobile Marketing (La Evolución del Mobile Marketing)

Mobext

http://www.mobext.com/insights/Mobext_GlobalMobile_final.pdf

Mobext's Global Mobile: A Worldview - a study that analyses the relevance of the industry at a regional and global level highlights and analyses four crucial pillars that will have increasing importance in the marketing mix in the near future: SMS/MMS, localised marketing, web mobile, and brand contents. The first part of the report is segmented according to regions; the Latin American section focuses primarily on Brazil and Mexico, the two countries displaying the most pronounced increase in demand vis-à-vis mobile devices. In Brazil, cell phones have made their way to 73 per cent of the population, with 40 per cent of mobile users having the option to access the internet via cell phones. In Mexico, the year-over-year growth of mobile marketing was at 15 per cent. Both countries, the report affirms, display excellent potential for growth in the coming future.

Analysis of Mobile Market – Central America (Análisis del Mercado Móvil – Centro América)

Signals Telecom Consulting

http://www.signalstelecom.com/index.php?option=com_content&view=article&id=89:12082009costarica&catid=44:press2009&Itemid=84

Signals Telecom Consulting's the *Analysis of Mobile Markets* carefully monitors the regulatory framework, dynamics, mobile operators' strategy and growth projections of Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama. Costa Rica and Panama are the poster children for telecommunications growth in Central America. According to the report, Costa Rica will have penetrated approximately 65 per cent of the market when it receives its first competitor in Q3 of 2010, a lower rate than that seen in Honduras and Panama when Digicel was launched commercially in those markets. Nonetheless, Costa Rica is expected to exceed 100 per cent of mobile phone penetration less than nine months after the entry of at least two competitors. In Panama, the recent upswing in new mobile competitors entering the market precipitated Signals Consulting to project more than six million mobile lines by 2014. The report also highlights commercial strategies being implemented by Movistar, Claro and Digicel that were previously successful in other Latin American countries.