Mobile Internet – Delivering on the Promise of Mobile Advertising
Part I of the Yahoo! Mobile Whitepaper Series
Scope

“Mobile Internet – Delivering on the Promise of Mobile Advertising” represents the first in a series of white papers from Yahoo! that provides an overview of the mobile landscape, explores the potential of emerging applications and explains mobile capabilities to marketers looking to integrate mobile into their advertising campaigns. This paper discusses mobile and tablet usage, delivers insights about mobile advertising effectiveness, presents real world case studies and details current best practices in mobile advertising.

Executive Summary

Mobile Internet came of age in 2010, offering advertisers the scale, tools and technology to develop effective campaigns and vie for a fair share of major media budgets. However, mobile advertising still lags behind the opportunity. Will brands realize the full potential of mobile in 2011? To do so, marketers will need to approach mobile as a channel, not a strategy, albeit a particularly effective channel due to its ability to connect with consumers in a very personal way.

If it feels like mobile phones are everywhere, it’s because they are. More than 80% of the U.S. population owns at least one mobile phone. Unusual in the world of consumer electronics, mobile users express intense feelings about their phones, describing the devices as a seamless extension of their person and psyche.

Faster network speeds, function-rich smartphones and tablets, a burgeoning portfolio of applications and more engaging ad formats like screen takeovers and expandable ads enable mobile to compete with more established media. As for mobile’s position in the media rankings, the facts speak for themselves. Mobile

“Digital advertising is now an integrated strategy; PC, Phone & Tablet.”

Paul Cushman, senior director of mobile sales strategy, Yahoo!
attracts younger, more affluent and more educated consumers and delivers on performance benchmarks such as awareness, message association and purchase intent.

Perhaps most importantly, mobile effectively moves consumers through the marketing funnel from awareness to purchase, repeat buys, and advocacy. Half of consumers claim they purchase an item after researching it on their mobile and 90% of mobile owners access the web from the retail store floor:

Mobile functions most effectively in an integrated media environment coupled with online display. This combination amplifies budget efficiencies and achieves synergies that increase key metrics like awareness and purchase intent. Integrated mobile and personal computer (PC) campaigns resulted in a 54% increase in brand awareness, a 46% increase in brand favorability and a 42% increase in aided brand awareness.

Mobile has proved itself a most adaptable medium, facilitating quotidian tasks like shopping, checking bank balances, locating restaurants or stores, navigating routes, monitoring health, paying bills, downloading music and videos, texting friends and yes—making phone calls. Consumers have embraced smartphones with open arms and mobile Internet has finally reached enough scale to offer critical opportunities for marketers.

Now, tablet computers have emerged as a potential contender for screen dominance. Experts credit the iPad launch with singlehandedly reinvigorating the tablet market. Penetration projections show a growth trajectory from 10.3 million tablet users in 2010 to 82.1 million by 2015. The turning point occurs in 2012 when tablet sales (36% of U.S. PC sales) should outstrip those of notebooks/mini PCs at an estimated 32%.

Content Highlights

What are current mobile user preferences and patterns?

- Mobile adoption patterns mirror the early days of the Internet when email dominated usage.
- Rather than waxing and waning with the workday and workweek, mobile user traffic remains constant throughout the week.
- 86% of mobile Internet users surf the mobile Web while watching TV.

Is mobile advertising effective?

- Click-through rates on a mobile web movie campaign were 30x higher than the PC counterpart.
- Ad recall scored 15% higher among users who viewed a mobile ad than any other channel.

How are people using tablet PCs?

- On the advertising front, iPad users demonstrate high receptivity to advertising, especially if coupled with an interesting video (49%) or interactive features (46%).
- The iPad diverts time and attention away from other devices, impacting video game players the most and smartphones the least.

What are some opportunities and best practices for mobile advertisers?

- Use mobile ad buys strategically to smooth over audience troughs when traditional advertising traffic diminishes during work hours and on weekends.
- Mobile is finally scalable enough to be an extension of an advertiser’s communication strategy and should be incorporated into all buys.

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Observations and Findings

Mobile Penetration

When form meets function and scale is achieved, great things happen. Witness the explosive growth in the mobile marketplace. By 2011, estimates predict there will be more than 246 million U.S. mobile phone users, half of whom will enjoy 3G capability.\textsuperscript{x}i

Even as 3G expands its footprint, more advanced 4G capability gains a foothold. At the 2011 Consumer Electronics Show, virtually every major telecommunications player revealed plans for rolling out a 4G network.\textsuperscript{xii}

Additional projections show upwards of 126 million mobile Internet users in 2011, representing nearly half of the online population and a 22% increase over the prior year.\textsuperscript{xiii} Morgan Stanley analysts believe that by 2014 “more users globally will connect to the Internet over mobile devices than desktop PCs.”\textsuperscript{xiv}

Growth drivers behind the rapid uptake include advancements in network and device technology as well as a wide array of entertaining and practical applications. From a technology perspective, the advent of 3G redefined the mobile experience, adding high speed web access, global roaming, TV streaming, videoconferencing and navigation maps to the 2G experience. Now 4G technology has entered the equation, bringing unprecedented bandwidth and speed to mobile users.

Developers often summarize the nascent 4G experience as MAGIC, an acronym for mobile multimedia capability, anytime/anywhere access, global mobility support, integrated wireless solutions and customized personal service. What that means in consumer terms is a more interactive, immersive and engaging mobile experience.

**Mobile IQ: Smartphones**

Smartphones represented the device of choice for 30% of mobile owners in 2010, a rate that doubled in just two years, as prices began to drop.\textsuperscript{xii} Not surprisingly, user age correlates inversely to smartphone adoption with younger consumers stimulating device demand.\textsuperscript{xv}

Smartphones are so embedded in the Millennial and Gen X lifestyle that Yahoo! proprietary research uncovered a high level of emotional attachment to this primary instrument of social connection. Survey respondents admitted feeling “…confused and completely lost”, “…mad, disconnected and slowed down”, or “…naked in a weird sort of way” if their mobile phone was taken away for the day.\textsuperscript{xvi}

Email remains top on mobile Internet activities

If all U.S. mobile Internet time were condensed into one hour, this is how much time would be spent in each channel.
The typical American smartphone owner is a 25-34 year old male earning more than $100,000 per year who uses the phone both for personal and business purposes\textsuperscript{xvii} Although called a smartphone, the units deliver much more than phone service. They function as:

- Newspapers and magazines—one in three mobile phone users relies on their phone to deliver the news daily\textsuperscript{xvii}
- Video players—mobile video viewing increased 70% from 2008-2009\textsuperscript{xx}
- PCs or laptops—Mobile Internet access is so ubiquitous, survey respondents listed it as the number one feature they would miss on their phone\textsuperscript{xx}
- Entertainment centers
- Gaming arcades
- Shopping and online research tools
- Personal assistants
- Route navigators
- Video conferencing services
- Communication networks enabled with text and email; the ultimate in anytime, anywhere connectivity

User Preferences and Patterns

What's the proverbial “killer app” that will mobile-ize consumers? It's not the super popular “Angry Birds” title. Surprisingly, it's the proven workhorse known as email. Mobile adoption patterns mirror the early days of the Internet when email was the Web killer app and content was king.

Industry experts attribute mobile email’s viability as a business medium to its permission-based platform and user control over the inbox. While texting and social media reign on the personal mobile front, email outperforms those channels on metrics like brand engagement and overall value.\textsuperscript{xxi}

“It’s like the cell phone has completely integrated into my life at this point.”

Yahoo! Mobile Landscape study, December 2010
Perhaps unique among electronic devices, mobile Internet use ranks almost equally high for in-home (89%) and out-of-home (93%) access, a fact that speaks to ease of use and portability. Among the most popular categories for mobile browsing are general search, social networking, news, sports, maps, movies and online retail.

Other popular pursuits include taking pictures, texting, visiting social networking sites, watching videos and online shopping. Almost 25% of the population uses at least one cell phone application (app), with pronounced gender-based app preferences surfacing.

The biggest differences exhibited between the sexes showed women 14% more likely to select social networking apps and 5% more likely to pick a music app, while men were 21% more likely to opt for sports and 8% more likely to choose a news app.

Rather than waxing and waning with the workday and workweek, mobile user traffic remains constant throughout the week, and holds at a consistently high level from 9 a.m. until 11 p.m.

Mobile proves especially effective at enhancing the Internet experience, complementing PC access. Six in ten mobile Internet users sometimes visit a site on their mobile device and then follow-up later from a PC. In the same vein, 86% of mobile Internet users surf the Web while watching TV, often searching for information on advertised products.

Commercial breaks on TV appear to trigger an uptick in mobile Internet use as viewers reach out to friends to discuss programming or research an advertised product.

Yahoo! research recently proved a positive correlation in mobile usage during large primetime TV events.

The properties explored: the Academy Awards and the World Cup finals. During the 2010 Academy Awards, traffic on Yahoo! Mobile increased 12% on average during commercials, while Yahoo! Mobile Front page activity bounced up by 24%. Mobile browsing activity rose by 57% on Yahoo! News and Yahoo! Search recorded a 12% hike.

The highest peaks happened immediately after the shows ended on TV, suggesting that viewers looked beyond the tube to learn and read more about the awards or game.

The performance differential between the two events ascribes to fewer viewers and ad breaks in soccer programming.

This data shows that mobile affords marketers a significant opportunity to reinforce television advertising impact and continue the conversation with consumers as viewers transition from the TV to their mobile devices.
Mobile-Web user traffic lift during Academy Awards

Highest peaks occurred after the show, suggesting that users look beyond TV post-event to learn and read more.

Mobile-Web user traffic lift during World Cup

Halftime Commercials
Again, the highest peaks occurred after the event.

Yahoo! Study: Mobile Usage During Live TV Events, November 2010
Whetting the Consumer Appetite

With a nod to Apple advertising, whatever your interests, whichever your mobile device, there is indeed “an app for that” and a virtual store to shop for them. In 2010 alone, the Apple App store boasted 300,000 different apps (mostly paid) with rival Android Market at 200,000 apps (mostly free).xviii The four most popular app categories are games, weather, maps, and social networking. Industry analysts expect mobile app revenues to climb to more than $15 billion, tripling during 2011 thanks to a projected 17.7 billion downloads.xix

Mobile Advertising and Effectiveness

Mobile advertising is gaining traction among consumers. Almost two-thirds of U.S. mobile phone users surveyed stated they are comfortable with mobile ads,xxiv and 20% of shoppers who saw ads during the shopping process said they always look at it.xxv

Yahoo! research also demonstrates mobile’s staying power as part of an integrated mobile and online marketing effort. Movie studio executives looking to build buzz and intent-to-watch for a summer movie release designed an integrated online and mobile campaign on Yahoo!. The rich media interactive ad unit took full advantage of mobile versatility by featuring animation and incorporating tap-throughs to a microsite where moviegoers could watch a trailer or buy tickets.

Consumers exposed to both the mobile and online movie ads expressed the largest increase in interest—a 39% lift attributable to the combined electronic schedule versus nine points for an online ad only schedule and four points of lift for a mobile only flight.x To determine whether findings would hold across categories and measure the effect of timing within a media plan, Yahoo! explored a combined mobile/PC campaign that launched a new crossover SUV. The promising results will help marketers more precisely calibrate the timing of media within a campaign.xvii

In this study of a mobile/PC campaign, Yahoo! determined that PC and mobile advertising work well together for brand advertisers. Ad recall scored 15% higher among users who viewed a mobile ad than any other channel. A blended mobile/PC campaign proved more effective among prospects on the ad recall

Categories of Applications Used in the Past 30 Days

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Games</td>
<td>61%</td>
</tr>
<tr>
<td>Weather</td>
<td>55%</td>
</tr>
<tr>
<td>Maps/Search</td>
<td>50%</td>
</tr>
<tr>
<td>Social Networking</td>
<td>49%</td>
</tr>
<tr>
<td>Music</td>
<td>42%</td>
</tr>
<tr>
<td>News</td>
<td>36%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>33%</td>
</tr>
<tr>
<td>Banking/Finance</td>
<td>28%</td>
</tr>
<tr>
<td>Sports</td>
<td>30%</td>
</tr>
<tr>
<td>Dining/Restaurant</td>
<td>25%</td>
</tr>
</tbody>
</table>

Nielsen Mobile Applications Playbook, August 2010

Increase in movie interest and intent to watch for mobile + online campaign

<table>
<thead>
<tr>
<th>Treatment</th>
<th>Interest Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Only</td>
<td>38% (+24%)</td>
</tr>
<tr>
<td>Mobile Only</td>
<td>56% (+7%)</td>
</tr>
<tr>
<td>Online + Mobile</td>
<td>71% (+39%)</td>
</tr>
</tbody>
</table>

Yahoo! Study: Mobile + Online Ad Effectiveness, September 2010
Mobile Shoppers: Dialing for Dollars

One of the most compelling reasons behind the surge in mobile popularity resides in its ability to deliver a highly desirable target: shoppers. Not just any shoppers, either. Mobile shoppers profile as young, affluent and connected. Nine out of ten access the mobile web while in-store, and half of that activity is linked to shopping.¹

![9 out of 10 access the Mobile Web while in-store](chart)

On average, 16% of consumers incorporate mobile research into their shopping process, and more than half of those consumers end up making a purchase.¹ Based on expressed interest in mobile shopping for the next 12 months, marketers can expect those numbers to soar even higher.

Voice, video, photos, text. Consumers can match their message and mood to a specific modality and convert what was once an isolated activity like shopping or research into a social occasion.

Researchers discovered that for 56% of mobile Internet users, mobile served as a critical research tool when a PC was not available. Forty-five percent of respondents relied on mobile for researching unplanned and time-sensitive purchases, and 41% turned to mobile for impulse buys.¹

For researching, mobile is great for convenience, especially when not near a PC

<table>
<thead>
<tr>
<th>Mobile Activity</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile is good for doing research when I’m not near a PC</td>
<td>56%</td>
</tr>
<tr>
<td>I only research purchases on a mobile device when I’m not near a computer</td>
<td>50%</td>
</tr>
<tr>
<td>It’s good for researching unplanned purchases</td>
<td>45%</td>
</tr>
<tr>
<td>Mobile is good for doing time-sensitive research</td>
<td>45%</td>
</tr>
<tr>
<td>Mobile is good for researching impulsive purchases</td>
<td>41%</td>
</tr>
</tbody>
</table>

Yahoo! Study: Mobile Shopping Framework, November 2010

Creativity Unleashed

As smartphones evolve, so too does the portfolio of available mobile advertising formats. Rich media options will provide a richer, more emotional viewer experience, akin to that associated with television advertising. Not to mention agency creative directors will enjoy a new canvas for their fertile imaginations. Yahoo! proprietary research shows both engagement and click-through rates rising with the advent of engaging multi-media advertising executions, as much as 30 times higher than the PC version of the same campaign.

Recent entrants on the rich media ad front include:

- **Yahoo! Mobile Screen Takeover Ads**—custom overlay ads take over the mobile device screen and stay with the user as they scroll up and down the page.

- **Yahoo! Mobile Customized Expandable Ads**—these ad units cover two-thirds of the screen and include highly interactive elements such as polls, lead-capture tools and social engagement elements.

- **iPad Tap to Video Ads**—as the name implies, a touch of the iPad screen activates video, taking a banner ad to full canvas size for a more emotional connection incorporating movement and sound.

These sophisticated solutions afford marketers a chance to target and connect with audiences in a more interactive way, even as mobile owners consume increasing amounts of content on connected devices.
SCREEN TAKEOVER

Make a splash with these custom overlay ads that can take over the mobile device’s screen, how you want it to and in an integrated way.

Users will be eager to interact with these custom ads that will make your brand truly stand out.

This example shows an ad unit that can expand over the screen and stays with the user as they scroll up and down the page.

IPAD TAP TO VIDEO

Tell a broader, deeper story with this new video + multi-paneled ad format designed specifically for the iPad and its users.

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Tablet PCs

*PC World* magazine dubbed 2010 the “Year of the Tablet PC”. Judging by ballooning tablet PC sales, they were right. Following the growth trajectory of prior successful launches for PCs, smartphones and MP3 players, some 15.7 million tablets sold in 2010. eMarketer estimates that 43.6 million units will move in 2011 and a whopping 81.3 million tablets by 2012. Leading the resurgence in tablet sales is Apple’s highly touted iPad, who some believe to have singlehandedly reinvigorated the category.

The 2011 Consumer Electronics Show attracted a raft of computer manufacturers eager to debut their tablet entries. Universally, these tablet upstarts feature touchscreen activation coupled with enhanced feature bundles and the added appeal of lower prices or inexpensive Internet contracts specifically designed to target iPad buyers.

According to Forrester Research, tablets will comprise 38% of all PC sales by 2015, outstripping desktop, notebook and netbook PCs. While the iPad tablet owner profile parallels that of smartphone owners (young, employed males), their utilization habits differ. Smartphone users access their device just about everywhere,
but more than half of iPad users restrict tablet use to the home setting.

The typical tablet user enjoys a wired lifestyle and owns six connected devices on average—a netbook, the tablet, an ebook, a portable media player, a portable game player and a smartphone.\textsuperscript{iv} The iPad diverts time and attention away from other devices, impacting video game players the most and smartphones the least, and is used primarily to access the Internet via Wi-Fi.\textsuperscript{iv}

Despite similar interfaces, iPad users spend 2.7x more time during their online sessions than iPhone users, reflecting a deeper level of engagement facilitated by the larger screen and easier keyboarding.\textsuperscript{iv} Popular activities reported by iPad users include email (51%), downloading applications like games (39%), accessing social network sites (33%), reading digital books and magazines (31%), playing downloaded or pre-installed games (30%), downloading pictures (29%), and at 27% each, videostreaming, watching full TV shows or mobile TV, downloading music, online game playing and watching downloaded or recorded videos.\textsuperscript{iv}

The iPad earns top marks for visually-driven content like print and video where a larger viewing screen improves the experience, while the iPhone receives higher scores for music and news. Short (five minute or less) “snackable” news sessions characterize the iPhone experience. These expand to lengthier, more immersive newsgathering sessions on the iPad.

On the advertising front, iPad users demonstrate high receptivity to advertising if coupled with an interesting video (49%) or interactive features (46%).\textsuperscript{iv} These savvy consumers express a preference for staying within an application on the iPad, willingness to accept advertising in exchange for free content and a higher likelihood to buy in response to advertising.

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{ipad-ad-receptivity.png}
\caption{iPad users are more receptive to interesting and interactive advertising}
\end{figure}

\begin{itemize}
\item I am more likely to look at ads if they have interesting video
\item I enjoy ads that have interactive features
\end{itemize}

\textsuperscript{Nielsen Connected Devices Playbook, September 2010}
Opportunities and Best Practices

Graduating from the “teens who text” crowd to early tech adopters, mobile has gone mainstream, the medium of choice and accessory for daily life. Portability and immediacy, two defining mobile attributes, win the day by resonating with the micro-bored target audience—those who crave stimulation and view standing in line at Starbucks, riding an elevator or walking the dog as a waste of downtime unless they’re mobilized.

From Prime Time to My Time. Use mobile ad buys strategically to smooth over audience troughs when traditional advertising traffic diminishes during the day and on weekends. Mobile redefines the conventional concept of dayparts, expanding effective advertising hours beyond prime time to “my time”, the early and wee hours of the day when multi-tasking mobile users connect with the world.

Living the Three Screen Life. The core mobile audience occupies the “first job to first baby” lifestage niche and boasts admirable disposable income, an active social network, trend setting ability and the need to communicate widely and often. That core segment is broadening daily as more consumers live a three-screen life (TV, PC, mobile). Integrate TV, online, and mobile ad campaigns to generate higher brand lift and purchase intent than either channel can deliver alone.

Mobile is a Channel, Not a Strategy. When considering integrating mobile into marketing plans, one prime directive rules: mobile is a channel, not a strategy. Similar to TV, print, billboards, transit, radio, online and other media, mobile should be an extension of the communications strategy, just like any other channel. What differs is the ability to connect with consumers in a more visceral way by taking full advantage of intrinsic mobile characteristics.

Price, Product, and Benefits. Advertisements customized and relevant to mobile user interests and those reflecting user locations receive a better consumer response. When asked, mobile users expressed a preference for informational advertising that included specific data such as price, product features and benefits. Consumers who research via mobile when shopping represent a highly engaged and receptive audience accessible at the time and point of purchase.

Get Creative. Like a blank canvas, the newest generation of 4G-enabled smartphones affords advertisers the opportunity to unleash their creativity and incorporate mobile display choices such as adhesion banners, video, expandables, takeovers and couponing. Functionality options within ad units range from social media integration to data collection to click-2-call, each contributing to an interactive and immersive user experience

Adapt Techniques to Capabilities. From a practical perspective, both search and display advertising require different vantage points to achieve maximum effectiveness. By nature, most mobile searches are short in duration and length, reflecting screen limitations. This suggests focusing on headline and brand terms to grab attention quickly. Designers need to anticipate typos, an unfortunate but expected consequence of tiny keypads and on-the-go typing. Top billing on search pages becomes critical because most mobile searches allow only one ad per page.

Ask for the Order. Mobile display ads should incorporate a strong call to action as consumers may literally be in the store making a decision. Shoppers on the go can be motivated to buy with simple tactics like providing a store locator or a time-critical coupon. Impulse buys can be stimulated by placing click actions on the right side of the screen to accommodate right-handed users (approximately 90% of the population).

Test and Track to Improve. That which gets measured gets mastered. A basic, yet often overlooked best practice for mobile or any other form of advertising, is to define and measure specific campaign goals and success metrics such as click-through rates, brand awareness, brand favorability, ad recall, message recall and purchase intent.

Consider Your TV Budget. Yahoo! studies exploring the interplay between major live TV events and mobile utilization suggest that reallocating budget from TV to online ads may prove surprisingly effective. For marketers, the ongoing search for a medium that defies message overload and creative clutter may literally be at hand, and in hand, with smartphones.
Conclusion

Smartphones and tablets represent game changers for consumers and advertisers alike. Personal, omnipresent, customized, connected, entertaining, informative, mobile Internet achieves the dream of anytime, anywhere access. Effective in its own right as an advertising medium, mobile Internet improves outcomes when combined with online efforts in an integrated multi-media campaign.

Advertising fundamentals remain the same in the mobile milieu. Marketers need to respond to consumer wants and preferences as with conventional media, but in a manner that capitalizes on all the features that delineate mobile as a one-of-a-kind medium. Consumers live three-screen lives, navigating the world through their TV, PC and mobile interfaces, often at the same time.

The mobile marketplace morphs daily, with new applications and technologies arriving on the scene. Yahoo! has cultivated more than 100 mobile partnerships with industry leaders, investing in mobile infrastructure, technology and content that enables consumers to engage with brands in a more meaningful way. The goal: help advertisers understand emerging mobile trends and convert the power of the mobile medium into bonded customer relationships and product sales.

“The mobile Internet is my co-pilot and helps to drive me through life.”

Yahoo! Mobile Landscape study, December 2010
Research Index

The following studies of mobile technology and consumer behavior are available from Yahoo!

Yahoo! Insights on iPad Users, January 2011
Yahoo! What You Need to Know About the Mobile Landscape, December 2010
Yahoo! Mobile Usage During Live TV Events, November 2010
Yahoo!/Nielsen Mobile Shopping Framework, November 2010
Yahoo! Mobile + Online Ad Effectiveness (Movie Campaign), 2010
Yahoo! Cross Media Report, October 2010

About Yahoo!

Yahoo! attracts hundreds of millions of users every month through its innovative technology and engaging content and services, making it one of the most trafficked Internet destinations and a world-class online media company. Yahoo!’s vision is to be the center of people’s online lives by delivering personally relevant, meaningful Internet experiences. Yahoo! is headquartered in Sunnyvale, California. For more information, the company’s blog, Yodel Anecdotal (http://yodel.yahoo.com).

For more information about advertising with Yahoo!, visit http://advertising.yahoo.com. To have a researcher present any Yahoo! studies to your organization, contact iraa@yahoo-inc.com.

i. Yahoo!/Nielsen Mobile Shopping Framework, November 2010
ii. Yahoo! Mobile Usage During Live TV Events, September 2010
iv. Nielsen Connected Devices Playbook, September 2010
v. Yahoo! Mobile + Online Advertising Effectiveness Movie Campaign, September 2010
vi. Yahoo! Cross Media Study Report, October 2010
vii. Strategy Analytics, Wireless Device Strategies, October 2010
viii. InsightsExpress, Mobile InsightNorms, 2009
ix. Forrester Research, eReader Adoption Forecast, 2010 to 2015 (US)
x. Strategy Analytics, Wireless Device Strategies, USA, October 2010
xi. Forrester Research Mobile Adoption and Sales Forecast, September 2009
xiii. IDC Digital Marketplace, Mobile Internet CIS, July 2010
xiv. Morgan Stanley, Internet Trends, April 2010
xv. eMarketer, July 2010
xvi. Yahoo! Qualitative Survey–March 2010
xvii. eMarketer, 2009
xviii. Pew Internet Study March 2010, Network World March 2010
xx. FierceWireless Jan 2008, Mobile Landscape
xxii. comScore, July 2010
xxiii. Nielsen Mobile Applications Playbook, August 2010
xxiv. eMarketer, “2nd Quarter 2010 Survey Results”, 2010
xxv. Dynamic Logic’s Market Norms database filtered on North America and last 3 years, “Online Ad Awareness” metric Traditional=GIF/JPG
xxvii. Yahoo! Cross-Media Study, November 2010


xxxi. Yahoo!/Ipsos OTX Mobile Qualitative Research Study, 2010
