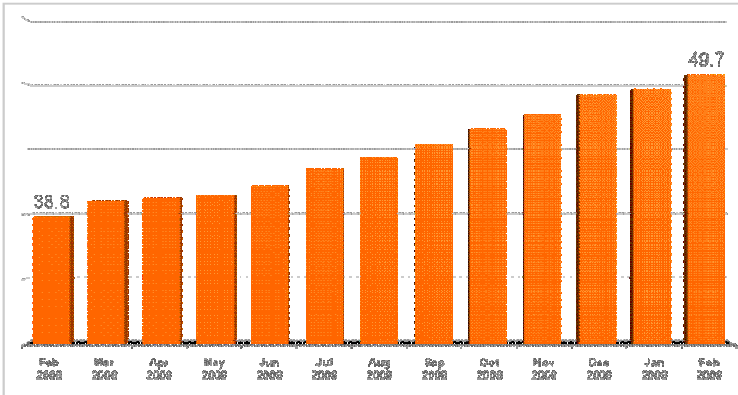


RESEARCH BRIEF: Mobile Phone Marketing

Mobile Marketing Landscape

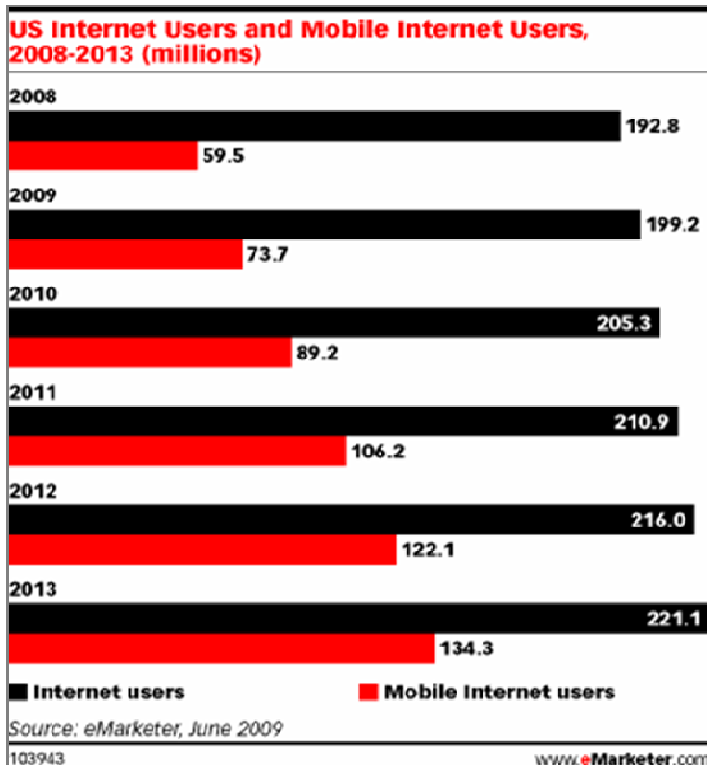
According to Nielsen there are a total of 267 million mobile phone subscribers in the US and 49.7 million of these subscribers are actively using the mobile web each month.

Monthly Mobile Internet Unique Audience



Source: Neilson Mobile 2008

By 2013 eMarketer predicts there will be 134 million + mobile internet users.



Worldwide SMS volumes are expected to grow from 2.6 trillion in 2007 to 5.5 trillion in 2013.

Mobile Internet Consumer Habits

According to eMarketer there is a 43-34 gender split among males/females who recall viewing Mobile advertising in Q1 of 2009. Also, Hispanics have a higher propensity to recall Mobile Advertising compared to other race/ethnicities.

Demographic Profile of US Mobile Phone Users Who Recall Viewing Mobile Advertising, Q1 2009 (% of respondents in each group)

Gender	
Male	43%
Female	34%
Race/ethnicity	
White	35%
African-American	40%
Hispanic	57%
Age	
18-24	59%
25-34	46%
35-49	39%
50-64	28%
65+	16%
Total	38%

Source: Brightkite, Inc. and GfK NOP Research, "Mobile Advertising Report: 1st Quarter 2009," provided to eMarketer, May 14, 2009

103966 www.eMarketer.com

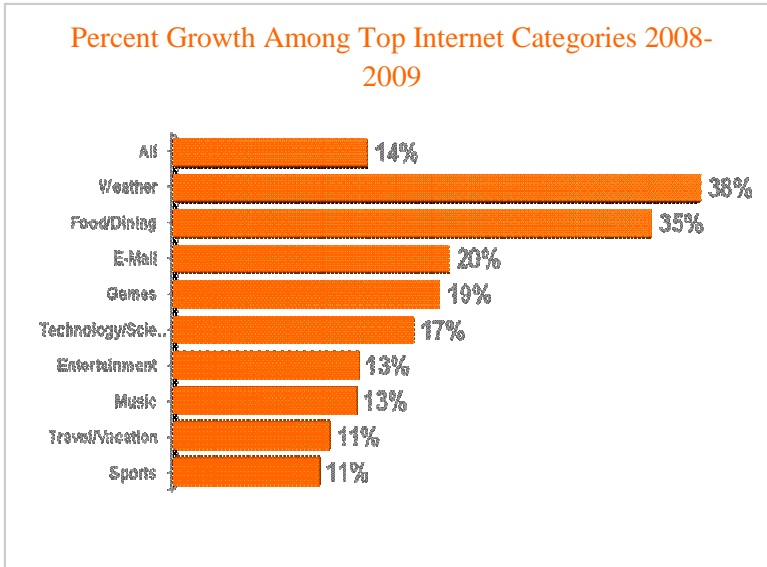
Consumer Mobile Activities by Age

	P13+	13-17	18-24	25-34	35-44	45-54	55-64	65+
Text	58%	80%	84%	74%	64%	50%	33%	50%
Email	18%	20%	26%	28%	21%	13%	9%	3%
Picture Message	29%	48%	51%	41%	29%	20%	14%	6%
Get Maps	6%	6%	8%	9%	7%	4%	3%	1%
Check Weather	9%	9%	13%	14%	12%	7%	6%	2%
Read News	8%	6%	10%	13%	11%	7%	6%	1%

Source: Nielsen Mobile 2008

It is important to note that the 65+ age group is engaged in text messaging. Mobile activities are continuing to rise against all ages.

Mobile Internet Consumer Habits (cont.) *Mobile Opportunities*



Source: Nielsen Mobile 2008

Mobile Content Activities of US Mobile Subscribers, November 2008 (thousands and % of mobile subscribers)

	Subscribers	% mobile subscribers
Sent/received photos or videos	63,736	27.7%
Received SMS ads	54,922	23.9%
Accessed news and information via browser	41,894	18.2%
Used e-mail	38,370	16.7%
Listened to music	21,006	9.1%
Accessed social networking sites	20,668	9.0%
Played downloaded game	20,468	8.9%
Purchased ringtones	19,556	8.5%
Accessed downloaded application	18,337	8.0%
Watched video	7,523	3.3%

Note: three-month average for period ending November 2008
Source: comScore M:Metrics as cited in press release, January 30, 2009

The popularity of mobile gaming is on the rise. According to eMarketing mobile customers are doing more than just talking and texting, 57% of them are also playing games on their wireless device.

Mobile works at a very personal level, allowing brands to develop an on-going dialogue with consumers to build brand loyalty. Mobile advertising can be used for either branding or direct response and has the ability to integrate with traditional media.

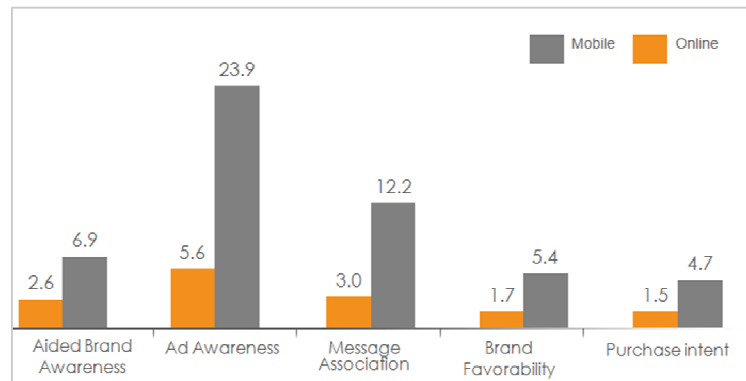
Internet Banners, Text Links, Pre-Roll Video: Similar to online advertising purchased to run across network of sites

SMS (Short Message Service): common term for the sending of “short” (160 character or fewer, including spaces) text message to mobile phones

3rd Party Application Sponsorships: Reach a captive audience of mobile consumers within trusted applications

Search: Currently 5.2 million US mobile searches expected to reach 56.3 million by 2013

Mobile Marketing Results



Source: Dynamic Logic 2008

Mobile proves to be three times more powerful than online advertising for raising purchase intent, brand favorability, and ad awareness according to Dynamic Logic.