

MOBILE ECOSYSTEM

"Put your best people on mobile" Eric Schmidt – Ex-CEO Google

SMALL SCREEN, BIG PICTURE

WW #s - Mobile Phone Usage in Context 1

- 6.9 Billion people, 5.2 Billion mobile phones, 1.6 Billion TVs, 1.2 Billion PCs, 1.0 Billion cars

Mobile Future Use 2

- A) The mobile only Internet population will grow from 14 million at end of 2010 to 788 million by end of 2015 (56X) B) By 2012, 57% of professionals expect to use a smartphone or tablet as their primary computing device (vs. a PC)

Mobile Marketing/Ad Spending in Context 3

- A) Total US Ad&Promo spend 2010 est. was \$577B, of that Online was \$66B (11%), of that Mobile was \$9.3B (15% of Online, 1.6% of TTL Ad&Promo)
- Mobile spend in 2010 was 93% national vs. 7% local
- Today Mobile is 15% of Online spend, in 2015 projected to be 64%
- 5 year increase of projected Local Mobile spend is 2,219%
- B) 48% of mobile owners have made a purchase w/phone

ADVERTISING & SEARCH

Top Mobile Platforms Used by Advertisers 4

- Mobile Web
- Mobile Display Ads
- Mobile Apps
- Mobile Search
- Mobile Messaging

Mobile Ad Spending Growth by Format 5

- Video 74%
- Search 59%
- Display 58%
- Messaging 21%

Top Categories of Mobile Ad Spending 6

- Search 46%
- Banner Ads 29%
- Opt-In Messaging 20%
- Games/Music/TV/Video 3%
- Apps 2%

ADVERTISING & SEARCH cont.

Mobile Promotion Spending Categories by Format 7

- Discounts/Rebates 50%
- Coupons 23%
- Sampling 14%
- Contest/Sweepstakes/Games 7%
- Proximity 7%

Mobile 2D Barcodes 8

- QR Codes
- Data Matrix
- Microsoft Tag
- EZ Codes
- Jag Tag

Top 3 Mobile Display Ad Campaign Goals 9

- Brand Awareness
- Drive Traffic
- Join/Download/Purchase

Top Action after Receiving Text Alert 10

- Visit company website for more info - 34%
- Visit company website to purchase - 33%
- Purchase the product promoted in store - 28%
- Recommend store to others - 23%

Vertical Explosion/Mobile Marketing 2010 Growth 11

- Retail & Restaurants 696%
- Entertainment 455%
- Telecommunications 285%
- Travel 216%
- Finance 183%
- Automotive 181%
- CPG 152%

Mobile Ad Spending by Delivery Method 12

- Browser/Mobile Portal 53%
- SMS/MMS 31%
- Email-7%
- Downloaded App 5%
- In Game 4%

Types of Mobile Search 13

- Mobile Optimized Search
- Mobile Q & A
- Mobile Directory Search
- Mobile Discovery Services

CONTENT/PUBLISHING

Top 5 Mobile Websites 14

- Google search
- Yahoo Mail
- Gmail
- The Weather Channel
- Facebook

Top 10 Video Channels 15

- You Tube
- FOX
- Comedy Central
- ESPN
- MTV
- ABC
- CBS
- Adult Swim
- NBC
- Discovery Channel

Top Mobile Content Activities 16

- sent text message to another phone 68%
- used browser 37%
- used downloaded app 35%
- accessed social network or blog 25%
- played games 27%
- listening to music on mobile phone 24%

Top Categories of Mobile Use (Overall) 17

- Email
- Social Networking
- Weather
- Maps
- Restaurant info
- General reference
- Online retail
- Auction Sites
- Shopping Guide

APPS

Top Mobile Apps to Watch for 2012 18

- LBS
- Social networking
- Mobile search
- Mobile commerce
- Mobile payments
- Context aware services
- Object recognition
- Mobile instant messaging
- Mobile email
- Mobile video

Top 10 Mobile App Categories by Revenue 19

- Games
- Music & Entertainment
- Social Networking
- Mail & Messaging
- News & Current Events
- Weather
- Sports
- Health & Fitness
- Shopping & Retail
- Books & Reference

INDUSTRY

Industry Newsletters, Magazines, Blogs 20

- Mobile Marketer
- Mobile Commerce Daily
- Mobile Marketing Watch
- Mobile Marketing Magazine
- Moconews
- Mobithinking
- Mobile World Live
- New Age Media

Industry Analysis, Trends/ Data Providers 21

- Econsultancy
- IAB/MMA
- eMarketer
- comScore
- Nielsen
- InsightExpress
- Dynamic Logic
- Collider Media

Mobile Resources/ Directories 22

- Mobile Marketing Spot
- Mobile Experts Directory
- CSCA Short Code Directory
- MDA Vendor Directory
- Mobile Marketing for Dummies (book)
- Mobile Commerce Vendor List

Training & Education 23

- Econsultancy
- Mobile Marketing Association (online)
- IAB

Econsultancy
Digital Marketers United™

Ecosystems are always evolving. If you'd like to suggest an organization, trend or idea, please let us know at MobileEcosystem@econsultancy.com

MOBILE ECOSYSTEM

INDUSTRY cont.

Associations & Conferences 25

- GSMA – Mobile World Congress
- IAB Events
- Mobile Marketing Association – Marketing Forum
- South by Southwest
- Mobile Marketer - Mobile Marketing Summit
- iMedia Mobile Bootcamps
- Advertising Week & Internet Week
- CTIA Wireless – Monetizing Mobile
- Mobile Ad Summit
- Apps World
- Mobile Data Association
- Mobile Commerce Daily – Mcommerce Summit (#4)

Legal/Regulatory 26

- Mobile Marketing Association – US Consumer Best Practices
- WTB – the Wireless Telecommunications Bureau
- Common Short Code Administration (CSCA)
- IAB/NAI (privacy)

INFRASTRUCTURE/DEVICES

Top Handset Manufacturers (% share 1/11) 27

- Samsung 24.9%
- LG 20.8%
- Motorola 16.5%
- RIM 8.6%
- Apple 6.4%

Top Smartphone Models (% Ad Requests 5/10) 28

- Apple iPhone 35.3%
- Motorola Droid 15.4%
- HTC Magic 5.5%
- HTC Dream 4.3%
- HTC DroidEyes 4.3%
- HTC Hero 4.2%
- Motorola CLIQ 4.0%
- Samsung Moment 3.6%
- RIM BlackBerry 2.9%
- HTC Incredible 2.0%

Top 10 Hottest Tablets of 2011 29

- Apple iPad 2
- HP TouchPad
- The Amazon tablet
- BlackBerry PlayBook
- ASUS EeePad Transformer
- B&N Nook Color
- Samsung Galaxy Tab 8.9
- HTC Flyer
- Motorola Xoom
- Samsung Sliding PC7

INFRASTRUCTURE/DEVICES cont.

Top Smartphone OS (Device Ad Impression Share) 30

- Android 48%
- iOS 31%
- RIM 18%
- Other 1%
- Symbian 1%
- Windows 1%

Tablet OS 31

- iOS 84%
- Android OS 14%
- MeeGo 1%
- Other 1%
- WebOS 0%
- QNX 0%

Carrier Mix: for Smart & Feature Phones, Connected Devices 32

(based on impression share 2010)

- WiFi (multiple carriers) 27%
- Verizon 19%
- Sprint-Nextel 12%
- AT&T 11%
- T-Mobile 10%
- Other 9%
- Metro PCS 7%
- Cricket 5%

Apps by Platform 33

- iPhone 333k
- Android 206k
- iPad 76k
- ovi 30k
- appworld 27k
- Getjar 20k
- wp7 12k
- app catalog 6k
- Mac 3k

MOBILE SERVICE PROVIDERS

Mobile Ad Networks (by Share of Revenue 2010) 34

- Google 19%
- Apple 18.8%
- Other 15.9%
- Millennial Media 15.4%
- Jumptap 8.4%
- Microsoft 7.8%
- Nokia 2.8%
- AOL 1.8%

SMS Short Code Aggregators/Gateways 35

- mBlox
- Clickatell
- Air2Web
- Mobile Messenger
- Motricity
- Kapow
- Open Market
- Single Point

MOBILE SERVICE PROVIDERS cont.

Mobile Search Providers 36

- Google
- Yahoo
- Bing

Mobile Marketing Agencies 37

- Phonevalley
- Joule
- Ancible
- Brandinhand
- Mobex
- Airwave
- 360i
- Rhythm New Media

Rich Media Providers 38

- Phluant
- Celtra
- Medialets
- Greystripe
- KrispWireless

Mobile Technology & Solution Providers (ASPs) 39

- Mobile Messaging Solutions
- iLoop
- Velti
- Sybase
- Motricity

Mobile Testing Services 40

- Device Anywhere
- Keynote

Mobile Analytics/Tracking 41

- Localytics
- Synovate
- Insight Express
- Dynamic Logic
- Mobitrove
- Forsee Results

Mobile Giving & Causes 42

- mGive
- Mobile Giving Foundation
- Mobile Cause
- Connect2Give
- Vital Wave Consulting
- mPay Connect
- GSMA mWomen

MOBILE COMMERCE

Mobile NFC Payments Companies to Watch 43

- Google
- Apple
- AT&T, Verizon, T-Mobile US
- Amazon
- Microsoft
- Paypal
- Boku

Mobile CRM 44

- Maximizer
- Oracle
- Salesforce.com
- SAP
- Sage
- Esalestrack
- Vaio
- CDC Software
- Microsoft
- Workbooks.com

Mobile Commerce Vendors 45

- Useablenet
- MyBuys
- Moovweb
- Digby
- Escalate Retail
- Branding Brand
- ATG
- Volusion
- Magneto
- Siteminis

Mobile Security 46

- BullGuard Mobile Security
- SMobile Security Field
- Kaspersky Mobile Security
- ESET Mobile Security
- Lookout Premium
- Norton Smartphone Security
- F Secure
- BitDefender
- NetQuin
- SecureWorks



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