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Importance of Mobile Advertising in Agency Media Plans

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by

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Abstract

Importance of Mobile Advertising in Agency Media Plans

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The explosive adoption rate of cell phones over the past few years has increased the desire for advertising agencies to explore mobile as an advertising channel. Over 90% of Americans own a cell phone, which opens a new channel for advertising agencies to reach consumers. The traditional advertising channels include print, television, radio, and most recently, the Internet. This professional report explores the importance and utilization of mobile as an advertising channel in advertising agencies media plans for their clients.

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Chapter 1:

Introduction

Mobile advertising is in the middle of an exciting time of its life cycle. The advertising industry itself is also in an exciting time as it is adjusting to the digital age of new technologies and discovering new solutions to meet their client's needs. The past few years in the advertising industry have seen a recession, the introduction of tablet devices, rapid growth in the interactive sector, and the widespread use of mobile advertising. With these groundbreaking changes in the advertising industry, agencies all over the world are forced to evolve. Agencies will be forced to prepare their media plans to include these emerging technologies for their clients.

Why this is an important topic

The consideration of mobile, which includes Smartphones as well as tablet devices, as a legitimate advertising channel is increasing. The following sections of this professional report discuss the extraordinary trending numbers of mobile growth and display its importance in clients' media plans. Mobile is a popular buzzword right now in advertising, and advertising agencies are beginning to adapt to include it in the media plans they make for their clients. As the technical jargon of mobile advertising becomes a growing part of the general public's everyday vocabulary, it is important for advertising agencies to not only understand it but also be prepared to execute the best client solutions utilizing this technology. The main subject of this professional report will be the importance of mobile advertising in every client's media plan.

Chapter 2:

Types of Mobile Advertising

There are three forms of mobile advertising: text messaging, which is commonly referred to as SMS, display, and traditional media with a mobile call-to-action or CTA. An agency must determine which of these three forms are growing and which are shrinking appropriately to invest their client's money.

Richard Ting wrote an article for Mobile Marketer published in November 2010 titled "Mobile Swiftly Moves to Core of all Brand Communications". In the article Ting writes about how he believes that all companies should be incorporating mobile into their communication plans, and that if a company does not have mobile incorporated into their communication plans already, then they do not have a proper growth plan in place for the brand. What's the best way to reach consumers with these forms of mobile advertising? Ting suggests that a combination of application, or app as they are commonly referred to, mobile web, and SMS is the best mix to help achieve positive results (Ting, 2010). This combination enables a brand to reach a diverse and large audience. Considering that not everyone uses Smartphones, tossing in different forms of advertising like SMS as well as a CTA from traditional advertising to use a mobile device will reach these consumer segments. Smartphone penetration is projected to increase during 2011, reaching 50% by the third quarter (Ting, 2010).

While analyzing the forms of mobile advertising, one form that is growing is SMS. The Cellular Telecommunications Industry Association (CTIA) is quoted as saying

there were 5 billion text messages sent in the second half of 2009 alone, with over 1.5 trillion messages sent throughout the whole year. There were also 24.2 billion photos, videos, and audio clips moving from one cell phone to another in just six months (Foresman, 2010). The 1.5 trillion text messages sent throughout the year supports the decision of agencies to invest in mobile advertising within their media plans. These numbers point to the importance of text messages today and solidifies cell phones as a major form of communication sharing.

Advertising within apps

Advertising within apps is in a growth phase. Apps are a hot topic right now, and the number of app downloads is growing at an extraordinary rate. Apple announced in 2010 the development of its iAd platform. iAd is basically Apple's process of integrating advertising into apps. The platform seamlessly shows the consumer advertising while they browse the app. While Apple will host and sell the ads, they plan to give 60% of the revenue to the developers (Kincaid, 2010). Advertisers can expect to achieve a high number of impressions using this platform. According to Apple's projections the average user spends 30 minutes a day in apps, and if a company shows an ad every 10 minutes that's around 1 billion ad impressions a day (Kincaid, 2010).

Apple's iAd platform is a rival to Google's AdMob platform that functions the same way. As a result of this platform and its heavy emphasis on development and apps, agencies will be forced to beef up their knowledge of app development. Many traditional agencies do not have large development teams and when they notice the number of

impressions they can receive utilizing iAd the agency will be forced to hire more developers, a shift in traditional agency structure.

Shifting the focus away from in-application advertising, another mobile section that is experiencing growth is mobile commerce sites. More consumers are purchasing items through mobile websites. Retailers need to be aware of the opportunity that comes with mobile commerce and mobile shopping. The exhibit below shows a detailed breakdown of the large percentage of businesses that do not use m-commerce but do utilize other forms of mobile advertising to promote and sell their businesses services (Grau, 2010).

Exhibit 2.1



Source: Multichannel Merchant, "Outlook 2010: E-Commerce," March 15, 2010

Most people (around 45% of North Americans) use their phone to access the Internet for a variety of in-store activities. This is a significant number, and it is hard for retailers and agencies alike to ignore it. Agencies must be aware of these statistics and use it to their clients' advantage. There is no telling how a simple m-commerce site could increase their clients' sales and exposure.

Overall, the three main forms of mobile advertising – SMS, display, and traditional advertising with a mobile CTA have unlimited potential. The numbers affirm the growing importance of their inclusion in agency media plans.

Chapter 3:

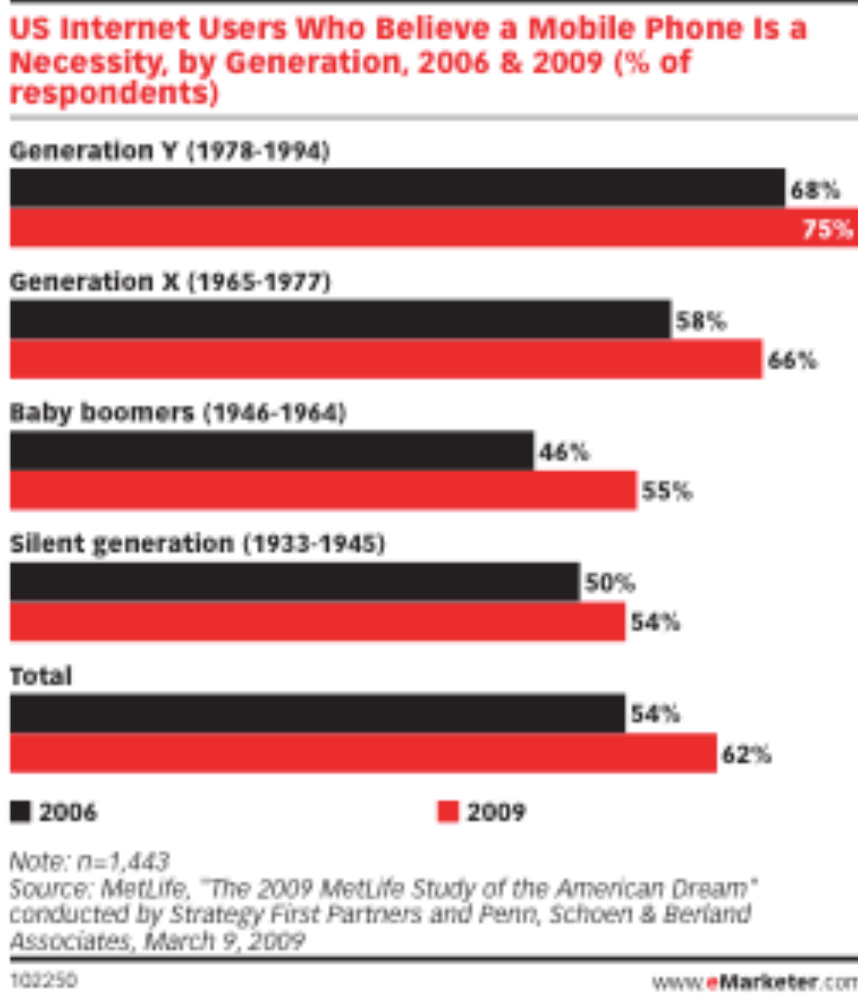
Demographics of Mobile Users

Cell phones have already been on a long journey. The platform is conducive to development, which has been the case since inception. Cell phones have gone from being simply portable phones, to the host for text messages, email, Internet, and now apps.

The first major demographic segment to adopt cell phones was baby boomers. The Pew Research Center reported that over 85% of boomers own a cell phone, although only 55% consider their mobile device to be a necessity (Phillips, 2010). Those are convincing numbers for cell phone growth, and even though there are still 45% of the demographic that does not believe a cell phone is a necessity, they still own the device. This is good news for advertising agencies, because they still have access to targeting these consumers.

The graph below shows the comparison of people believing mobile phones are a necessity in 2006 and 2009. Compounding this information is the fact that 75% of Generation Y, defined as anyone born between the years in the mid 1970s to the early 2000s, believes a cell phone is a necessity. This is a key demographic to target with upcoming advertising campaigns.

Exhibit 3.1



As one can see in the graph above the percentages of cell phone ownerships has sharply increased from 2006 to 2009, with baby boomers enjoying the most growth during this time frame. More baby boomers are adapting to current communication methods.

The following graph shows the breakdown of mobile phone users by age from 1995-2008. The demographic with the largest mobile phone penetration in 1995 was ages 40-49, present day 56-64. By 2008 mobile phone ownership had shifted downward in age with the largest penetration among 25-39 year olds. This downward shift in age range of mobile phone users indicates that this age range is more accepting of mobile advertisements.

Exhibit 3.2

US Adult Mobile Phone Users, by Age, 1995-2008 (% of respondents in each group)

	1995	2000	2002	2004	2006	2008
18-24	28%	53%	69%	66%	75%	86%
25-29	27%	66%	74%	71%	79%	89%
30-39	26%	61%	71%	76%	84%	89%
40-49	32%	59%	69%	76%	78%	87%
50-59	24%	55%	70%	73%	75%	84%
60-69	17%	43%	53%	60%	70%	79%
70-79	10%	28%	38%	50%	55%	69%
80+	7%	21%	24%	32%	41%	48%

Source: Pew Research Center for the People and the Press, "Audience Segments in a Changing News Environment," August 17, 2008

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The key age range within this graph that uses a cell phone is 25-39, but another notable fact is that all age segments experienced rapid growth. The lowest percentage that

uses a cell phone is 48%, but that is among the 80+-age range. It is remarkable that almost half the people above the age of 80 uses cell phones. Companies with this target demographic should take note.

How many people own a cell phone?

When agencies develop their media plans they do so based around which channel will receive the largest number of qualified impressions for the targeted demographic. Cell phone adoption rates are at an all time high. Almost everyone in the United States uses or owns a cell phone; in fact approximately 90% of the US population owns a cell phone (Swallow, 2010). That's a lot of people focusing on one channel.

The fact that approximately 90% of the US population has a cell phone might not come as a shock. Combine that statistic with a rapid cultural adoption of one technology, and other channels are sure to suffer. Consumers are also spending more time on mobile devices.

The demographics that show the strongest support for mobile advertising are people over the age of 50. Digital immigrants, as they are referred to sometime, show a strong interest in this channel of advertising. Agencies targeting this demographic will enjoy success with their mobile campaigns.

Chapter 4:

Trends of Mobile Advertising

Mobile advertising is undoubtedly a hot topic right now. Every consumer with a Smartphone is exposed to mobile advertising all the time whether they are aware of it or not. Even though mobile advertising has not been around for a long time there are already trends unfolding within the field.

Global mobile ad spend on the rise

Currently the global advertising spend for the category of mobile is projected to rise enormously. The cyclical nature of the advertising industry forces every agency to predict which channel is correct to invest their client's money. In 2011 global ad spend for mobile is projected to reach nearly \$12 billion, up from \$1.5 billion in 2006 (Swallow, 2010). That almost ten-fold increase in growth only emphasizes the importance of mobile in an agency media plan.

Time spent on mobile on the rise

In 2009 U.S. consumers increased their time spent per day on mobile by nearly 40%, while online activities dropped 17%, and TV & video dropped 32%. These statistics are according to a Yankee Group study (Elkin, 2010). This drop in traditional media usage supports the idea that mobile is a legitimate advertising channel.

The same article continues with the discussion that social media is the fastest growing mobile activity, up 240% year-over-year among app users and 90% among the people that access the Internet from the mobile browser (Elkin, 2010). Consumers are

spending more time on their mobile devices and while the 25-39 year old demographic is spending the most time, time is spread out amongst all age ranges. Advertising agencies do not have to be wary about launching a mobile campaign targeting older consumers because they are also spending more time on mobile devices.

Mobile Advertising on the rise during the Recession

Starting around the year 2008 the United States experienced what most experts are saying is the worst recession since World War II (Graham, 2008). The recession forced companies to cut their staff and budgets. One of the first things companies reduced was the amount they were spending on advertising. Overall advertising revenue was lower by year over year comparison, dropping from \$77 billion in 2008 to \$67 billion in 2009 (2009 U.S. Ad Market, 2010). The form of advertising that took the largest hit was TV advertising. Consumer media usage declined across the board and that, in turn, further reduced the amount companies spent on advertising. TV and video usage decreased about an hour a day on average, and overall time on media was decreased to 12 hours, from a high of 14 hours a day the year before.

This downturn in offline media usage was the Internet's gain, with people displaying more attention to that channel rather than the traditional channels. Mobile also showed growth, with consumers spending an average of 36 percent or 11 minutes a day on mobile Internet usage (2009 U.S. Ad Market, 2010). Presently, agencies must take note of the trends occurring in advertising, and acknowledge the growth in mobile usage and how it indicates an opportunity for their clients. The agencies that invested in mobile

advertising during the recession received lower rates and benefited by learning early lessons about the mobile channel before it became more popular.

Number of mobile devices shipped on the rise

Overall advertising spend on mobile is on the rise, but there is also a rise in the number of mobile devices being shipped worldwide. This includes all mobile Internet devices, such as notebooks, e-readers, media players, gaming platforms, and cell phones (Elkin, 2010). The number of mobile Internet devices shipped worldwide is projected to reach 416 million in 2012, up from 54 million in 2007. Mobile phones are the main focus of this professional report, but with that volume of mobile devices being shipped worldwide there is also growth in the market for mobile, Internet-enabled devices. More and more people are using their mobile phones to access the Internet, with over 35.4% of all mobile phone users in the US, or around 83.5 million, people accessing the Internet on their phone in 2010 (Phillips, 2010).

From an advertising perspective, the rise of mobile devices means more potential impression-based channels. The advertising industry loves to see this number increasing because it means that more people will be exposed to their advertisements. Agencies will also shift their focus and begin spending more money to advertise on these devices as compared to other traditional channels. The graph below displays the percent change in marketing spending by US marketers in May 2009 versus May 2008.

Exhibit 4.1

Change* in Marketing Spending by Their Clients According to US Marketing Agencies, by Tactic, May 2009 (% of respondents)

	Signifi- cantly lower	Some- what lower	No change	Some- what higher	Signifi- cantly higher
Social media	3%	5%	37%	37%	19%
E-mail marketing	2%	7%	42%	35%	15%
SEO	3%	9%	58%	23%	9%
Direct mail	13%	23%	40%	20%	5%
Banner ads	9%	17%	47%	24%	4%
Mobile	4%	7%	73%	13%	3%
Print	19%	38%	28%	13%	3%
Radio	10%	21%	55%	12%	3%
TV/broadcast/cable	11%	18%	55%	14%	3%

*Note: n=100; numbers may not add up to 100% due to rounding; *vs. one year ago*
 Source: Reardon Smith Whittaker, "2009 1/2 Client-Agency Economic Outlook Survey," June 7, 2009

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The graph above, from a May 2009 eMarketer report title “Marketing and Advertising: Change is in the Air”, details the breakdown of ad spend among channel types in 2009 compared to their spend in 2008. The biggest change to note is the decline in most traditional channels (print, radio, TV/broadcast/cable, and direct mail), and the dramatic increases in non-traditional channels including social media, email marketing, and SEO (Elkin, 2009).

It is worth mentioning again this eMarketer report was published during the middle of a historical recession. Most companies were more likely to spend money to advertise on the Internet during the recession than they were to advertise within traditional channels because of lower costs and barriers to entry. The numbers within the exhibit above display a significant change in gain and loss in a year over year comparison. They also favor the growth of mobile and the exhibit below shows the change in advertising spending the different channels a few months earlier in February 2009.

Exhibit 4.2

Change* in Advertising Spending According to US Advertisers, by Media, February 2009 (% of respondents)

	Increase	No change	Decrease
Mobile	54%	29%	17%
Search advertising	53%	37%	10%
Online display	51%	32%	17%
Internet total	52%	34%	14%
Cable TV	26%	51%	23%
Radio	19%	42%	39%
Outdoor	17%	54%	29%
Magazines	15%	33%	53%
Broadcast TV	16%	44%	41%
Local newspapers	5%	36%	59%
National newspapers	5%	35%	60%

*Note: n=1,500; *in the next six months*
Source: Advertiser Perceptions as cited by MediaPost, March 16, 2009

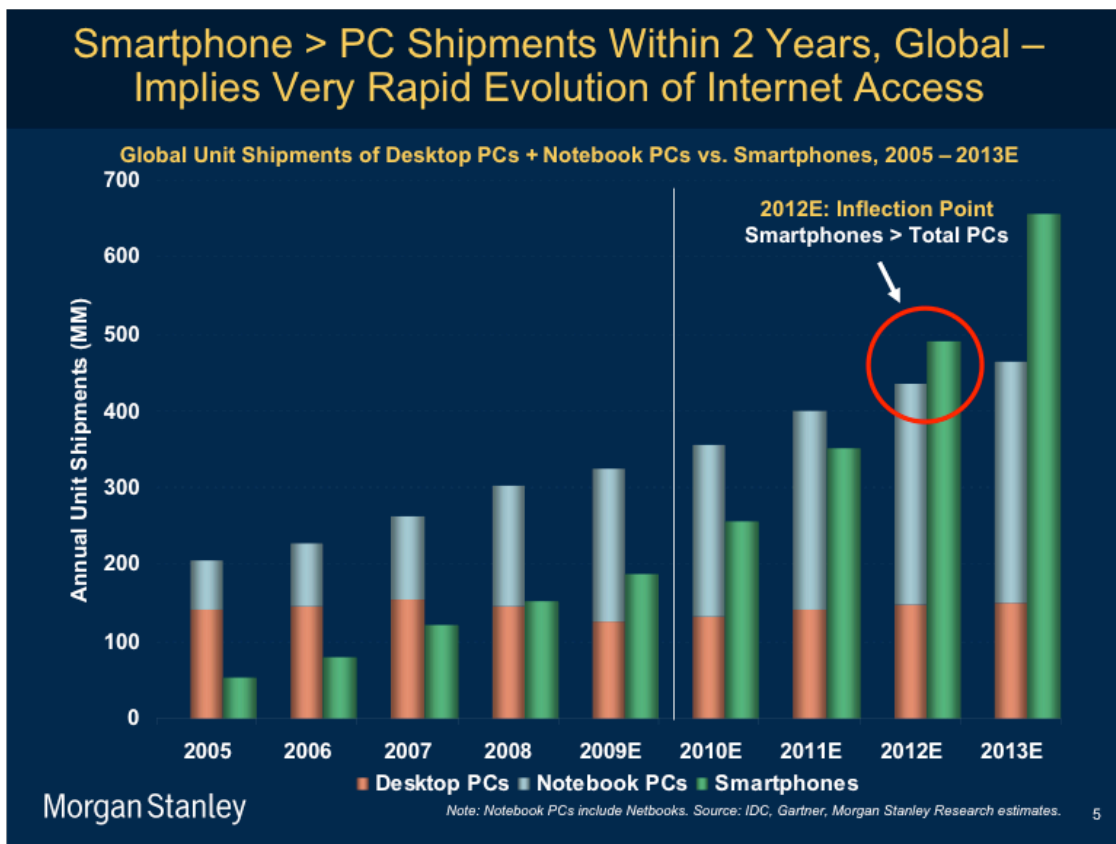
102401 www.eMarketer.com

The exhibit above shows the change in advertising within different channels. Traditional advertising spend is decreasing while Internet advertising spend is increasing, which further proves that agencies need to place their money into these channels. Mobile advertising was the largest gainer among all channels of advertising in a year over year comparison from 2008 to 2009. This is the most significant graph in this professional report. The trend data clearly positions mobile as the future at the expense of other advertising channels.

Smartphones on track to outsell PCs

Further supporting this belief is global demand projections provided by Morgan Stanley in the graph below. Smartphone shipments are on track to outnumber computers by the year 2012. If there are more cell phones being sold than computers then agency media plans must drastically change the way they target consumers.

Exhibit 4.3



Agencies are already embracing the importance of digital advertising in their media plans and with Smartphones on pace to outsell PCs, mobile phones will be gaining

ground. The number of Smartphones being sold nationwide is growing every day, but which Smartphone platform is particularly on the rise? A November 2010 article by Mobile Marketer discusses Google's claim they are activating more than 200,000 Androids a day (Ting, 2010). That number is gigantic, and with that many Smartphones in the market agencies need to incorporate mobile as a channel for advertising.

Mobile click-through-rates higher than Internet advertising

How do mobile advertising interaction rates compare to other channels of advertising? According to the Interactive Advertising Bureau's report mobile web click-through-rates, which is commonly referred to as CTR, averages between 2-5%, while the CTR for traditional Internet advertising is less than 1% (Interactive Advertising Bureau, 2008, p.5). A dramatically higher CTR on advertisements means a better conversion rate and eventually better results for their clients' campaigns.

People are also visiting e-commerce sites on their mobile device. One notable website, googlestore.com, grew from 277 visits in September 2008 to 13,000 visits in July 2010 from mobile devices. That is a huge increase in the number of visits and with that many more people visiting the website there will hopefully be a higher conversion rate (Google, 2010).

As mobile phone usage increases so will the demand for mobile content. eMarketer notes three major trends that will fuel increasing demand for mobile content (Verna, 2009):

- Growing numbers of mobile Internet users
- Dramatic increases in the amount of money they spend on data plans

- Continued growth in Smartphone sales

The combination of the three major trends above leads to an increased demand for mobile content. Since mobile advertising already has a higher CTR than traditional advertising channels the increase in mobile phone usage will support the fact that mobile advertising will be a good investment for any client.

Chapter 5:

Social Media

Facebook is a powerful force. It has over 500 million members and countless numbers of business, bands, causes, and pages. Most businesses and people use it for one thing, to stay connected. Through this platform people stay connected with their friends and family members, and businesses use it to connect with their current and potential consumers.

The three main social networks are Facebook, Twitter, and MySpace based on number of members. These three social networks have enormous penetration amongst Internet users. In 2010 57.5% of US Internet users visited a social network once a month, and this number is projected to hit 65.8% in 2014 (Williamson, 2010). This statistic is significant because it shows the amount of interest and time people have and spend in social networks. Advertising agencies view this as a great opportunity to deliver increased number of impressions. Over the past couple of years, as membership and time spent within social networks has increased, advertising agencies have begun to include social media as a channel in their media plans. It is unusual to see an advertising campaign today that does not include some element of social networking.

With the growing penetration of mobile phone usage occurring, an increasing number of people are also accessing social networks via their mobile phones. The exhibit below shows the increase in the number of people that have accessed either of the “big three” social networks via their mobile phone in a year over year comparison from 2009

to 2010. MySpace, which was one of the first social networks launched, is experiencing a steady decline in membership. MySpace’s decline is due in part to the launch of Facebook and Twitter, as well as the ease of use and less obtrusive ad placement that other social networks contain.

Exhibit 5.1

US Mobile Phone Users Who Access MySpace, Facebook and Twitter via Their Mobile Phone, January 2009 & January 2010 (thousands and % change)			
	January 2009	January 2010	% change
Facebook	11,874	25,137	112%
MySpace	12,338	11,439	-7%
Twitter	1,051	4,700	347%

Note: ages 13+; three-month average for the period ending January 2009 and January 2010
Source: comScore MobiLens as cited in press release, March 3, 2010

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The same eMarketer report also asserts that “by 2013, 44.5% of US mobile Internet users (and 22% of all US mobile users) will be accessing and using social networks from their mobile devices” (Williamson, 2010). With almost a quarter of all mobile users in the US accessing social networks through their mobile device, this is a rapidly growing opportunity for advertisers. Utilizing mobile, as a channel for messaging and to promote their products, is almost a must for agencies currently. The challenge with approaching this type of advertising is to assure it does not become too invasive and tacky, which could degrade social media as a legitimate advertising channel.

Not only are people using these social networks, but also they are very active on them. According to the same eMarketer report the top five activities people participate in on these networks are:

- Browsing social networks
- Posting comments on a social networking site
- Observe conversation on a social network
- Observe online forums/boards without commenting
- Comment on photos on a social networking site

People enjoy the connectivity that social media offers. It is a very engaging platform that offers large room for growth. The exhibit below is a great breakdown of what exactly people are doing on social networks via their mobile device. It breaks down what each gender is doing, which is important when hoping to reach the target demographic.

Exhibit 5.2

Mobile Social Networking Activities of US Mobile Internet Users, by Gender, November 2009 (% of respondents)

	Female	Male	Total
Browse social networking sites	53%	44%	47%
Post comments on a social networking site	50%	40%	45%
Observe conversations on a social network	36%	40%	38%
Observe online forums/boards without commenting	30%	40%	35%
Comment on photos on a social networking site	40%	30%	35%
Chat in a social networking site	37%	32%	34%
Post photos on a social networking site	36%	30%	33%
Forward items I like to friends/family via a social networking site	36%	30%	33%
Connect with other professionals on social networking sites (e.g., LinkedIn)	29%	29%	29%
Join a discussion on a social networking site	38%	22%	29%
Start a discussion on a social networking site	41%	22%	29%
Tag photos on a social networking site	28%	28%	28%
Become a member of a group on a social networking site	28%	24%	26%
Post event information on a social networking site	30%	18%	24%
Join a community on a social networking site	28%	22%	24%
Reply to video comments on a social networking site	25%	21%	23%
Post videos on a social networking site	20%	18%	19%

Note: n=500 ages 18+

Source: Ruder Finn, "Mobile Intent Index," February 12, 2010

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The exhibit above details the difference in mobile social networking activity by gender. It is interesting to assess the gender differences among these activities. The gender breakdown is not that surprising, with men being more likely to observe the activity and women more likely to comment on activity and post photos. Regardless of the activity, the important fact is that people are accessing social networks through their cell phones and advertisers have an opportunity to utilize this as an advertising channel.

So how does an advertising agency use Facebook and mobile devices to connect with consumers? Facebook is a place for people to converse about anything. It is a perfect channel for conversations to begin snowballing and a place where a brand can get some great feedback and press for a fraction of the cost of a traditional advertising channel. Businesses should utilize this space to discuss their upcoming product launches, new campaigns, run contests, or get consumer feedback on any aspect of their business. People are more likely to share their opinions on businesses' posts within social networks where they do not have to talk with someone face to face. The bottom line is social networks have unlimited potential for advertising and they are nowhere close to reaching it.

Chapter 6:

Location Based Social Networks

Another growing segment of mobile advertising is location based social networks. These include networks like Foursquare, Gowalla, and Facebook Places. The basic premise of these networks is that you ‘check-in’ to businesses upon arrival. Your friends, or followers, within these networks can then see your current location.

Location based social networks are a recent development, with Foursquare launching in 2009. By definition location based social networking is a mobile app that allows users to share their location with their friends on that network. Users “check-in” using a mobile website, text messaging, or a device-specific app. The central idea of location based social networks ties the real-time user activity of social networks to businesses. The main players in this category are Foursquare, Gowalla, and most recently Facebook’s Places based on membership and development.

As of October 16th, 2010 Foursquare had 4 million users (Saint, 2010), with Gowalla having around 150,000 members as of March 2010 (Mitton, 2010). Foursquare is considered by most professionals to be the dominant player in the market with the largest people & business membership. However, considering this is such a new technology, Gowalla is a viable competitor. Both companies are discovering how to utilize this emerging technology in conjunction with benefitting businesses.

Since South by Southwest, abbreviated as SXSW, in March 2010 when Foursquare held a private party for influential “tweeters” & “bloggers,” they have seen

their members grow from 500,000 to 4 million as of October 16, 2010 (Saint, 2010). This explosive growth is extremely significant and clearly indicates consumers are intrigued by a technology that combines social networking with location. Businesses are excited about the possibility to connect with new customers and expand their reach through this untapped technology.

Below are three case studies that detail success stories utilizing location based social networks.

Gap Case Study #1

On August 14th, 2010 clothing retailer Gap launched a joint campaign with location based social network Foursquare (Axon, 2010). The premise of the campaign was that if a Gap customer checked in to a store on August 14th they would receive 25% off their purchase that day. Gap hoped that friends of the users who checked in to the Gap stores would see their friend's involvement in the promotion and visit a Gap store themselves. It was one of the first campaigns of this type, and Gap called it the "BlackMagic Event" (Axon, 2010). The big idea was that the cross-promotion of the Gap discount and the Foursquare brand would benefit both companies. The discount was available for both Facebook and Twitter users, but it wasn't as easily accessible for these users since they had to print off coupons to redeem the savings (Axon, 2010). The promotion also had other shortcomings, as it was not promoted through traditional media. A promotion such as this one that is heavily integrated through online media is a big risk to take, but Gap did it and had some good results.

Gap Case Study #2

In November 2010 Gap ran another similar promotion through Facebook. If a customer checked in to a Gap store on Facebook Places they received a free pair of jeans (Indvik, 2010). Gap had around 10,000 pairs of jeans to give away for free to these customers and they successfully gave away all the pairs during the promotion. This promotion was just a string of social media-based promotions Gap conducted which included the previously mentioned Foursquare promotion. This promotion was also a cross benefit to promote Gap & Facebook's Places feature.

Pepsi Case Study

Another case study I explored involved Pepsi and their geo-targeted app. Pepsi, one of the largest soft drink manufacturers and distributors in the world, launched a geo-targeted app named "Pepsi Loot". This mobile loyalty app, built specifically for the iPhone, helps connect customers to Pepsi products through geo-location (Dilworth, 2010). When a user 'checks-in' to a location with this app they will be eligible for Pepsi "Loot" which they can redeem for Pepsi gear and goods.

Pepsi Co. also partnered with Foursquare to launch a mobile app called "Pepsi Loot" where a GPS map is provided that shows all the major food chains that have a "pop spot," or a soda fountain that provides Pepsi. Customers check in at these places and earn "Loot" or credits, which can be exchanged for music downloads or other participating store offers. The idea is that Pepsi customers will "win cool stuff for doing something that [they were] going to do anyway." (Dilworth, 2010) These promotions not only benefit for customers but also benefit the manufacturers and retailers. Businesses are

able to gain considerable insight into popular consumer activities outside of the storefront.

Location Based Social Networks Summary

With Foursquare companies are able to learn how location drives human behavior. Location based networking is still a new technology but the potential to gain valuable information on their target markets is very important. Pepsi Co's competitor Coke has also launched an interactive mobile scavenger hunt named SCVNGR. Major brands are rapidly adopting mobile technologies to stay connected to the consumer.

The impact of these location based apps on business and advertising is still unknown as this new technology is still in development. This type of advertising will be mostly utilized by small businesses competing against bigger businesses. Small businesses can advertise current promotions to people on their cell phones as they are within range of their business to entice new visitors. Flashing current deals on people's cell phones while they walk by will encourage visitors and promote their business.

Chapter 7:

Measurement

Measuring the success of a campaign is very important for the agency and the client. An advertising agency's ability to successfully communicate a message to consumers instills trust in their clients and is the difference between an agency that is successful and one that is not. Interactive advertising, which uses interactive media to communicate a message, is simplifying the process of campaign measurement.

In August 2010 Mashable produced a report titled "Top 5 Mobile Trends to Watch". This report details trends within mobile advertising and highlights growth patterns. The increased importance of SMS is the most surprising. Even though SMS is considered one of the main forms of mobile advertising I did not see it as the strongest. The numbers speak otherwise. For example, eMarketer reports the growth of the global market for ad support is going to reach nearly \$12 billion in 2011, compared to only \$1.5 billion in 2006. (Swallow, 2010). This amount of growth is unprecedented and displays the importance businesses believe mobile advertising will have in the future.

When we take a closer look at the numbers, SMS actually out-performs e-mail and Internet on the basis of CTR and conversions. The CTR and conversion rates are higher for SMS than for e-mail and display advertising on the Internet. The average CTR for SMS is around 14.06%, while e-mail is 6.64% and Internet ranks in at the lowest at 0.76%. The average conversion rate for SMS is 8.22%, while e-mail is around 1.73% and Internet hits around 4.43% (Swallow, 2010). After viewing the positive results SMS

produces compared to e-mail and Internet advertising, agencies should begin to include this into their clients' media plans. Mobile advertising has a higher CTR compared to other platforms because consumers are always using their Smartphones.

As touched on in the previous section, another reason why an SMS-component of a campaign is important is because a majority of recipients read their text messages. In fact around 90% of recipients view their text messages within three minutes of receipt and around 99% are read in general by the recipient (Swallow, 2010). This degree of attention given to one channel is extraordinarily high and is something that advertising agencies and marketers alike strive to leverage. If an advertiser can have over 99% of the advertisements in their campaign read by the recipients the campaign is set up to succeed.

Tablets & Netbooks

The main focus of this professional report has been advertising on Smartphones, but the reality is that companies are utilizing other mobile devices for campaigns. These other mobile devices include netbooks and tablets. The release of the iPad has had an extraordinary impact on mobile advertising and advertising in general. It has propelled tablet devices into the top spot as one of the hot new media devices.

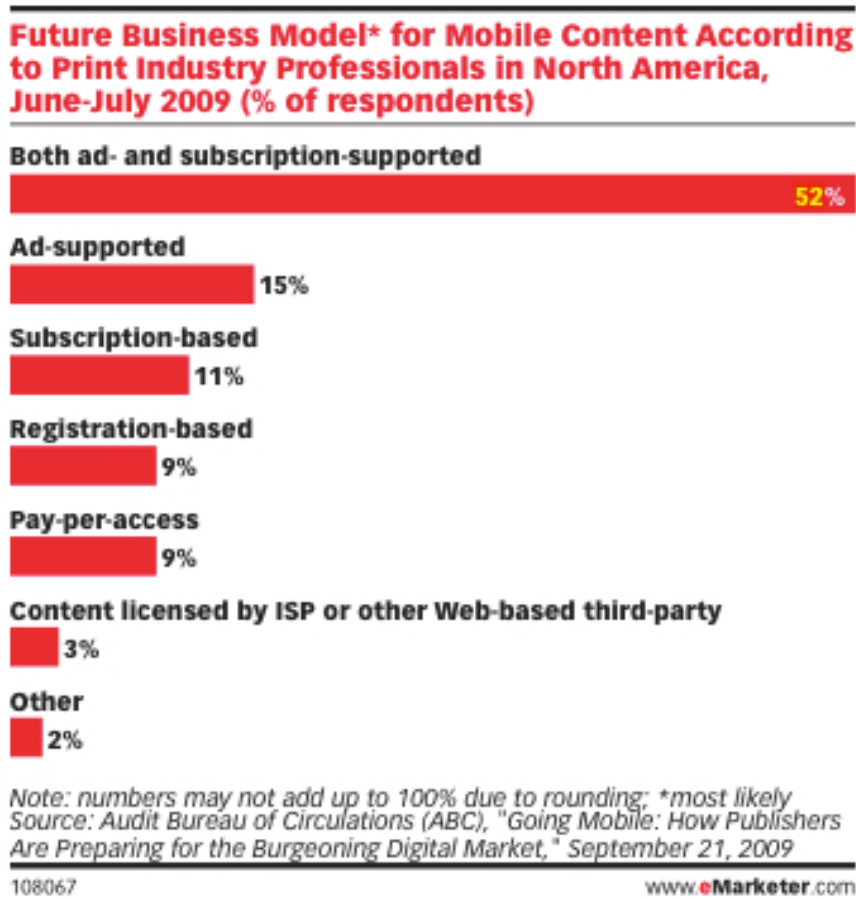
In 2010 Crate and Barrel launched a per-per-click campaign with the goal of driving customers to their mobile website from the following devices, Smartphone, iPod touch, or iPad. The campaign was a huge success by industry standards, achieving a CTR of 15% on the iPad device and an overall CTR of 3.48%, which included all other mobile devices such as Smartphones. This CTR is significantly higher than the industry average of 2.6% (Hofman, 2010). A higher CTR means more impressions on the website and

hopefully a higher conversion rate. These types of interactive campaigns that utilize mobile devices are easy to measure and assist the advertising agency in making an educated decision for their client.

The demise of the print industry

The success of mobile devices and tablets started a shift in which traditional print companies have begun to place more of their content on mobile devices. Traditionally advertising would support this type of mobile content, but as more and more content is placed on mobile devices, and less is actually printed, companies have to re-think their business model. The exhibit below shows how print industry professionals believe mobile content will be supported.

Exhibit 7.1



A majority of print industry professionals believe mobile content will have to be both supported through advertising as well as through subscriptions, instead of the old model where most of it was simply ad supported.

Most print publications survive on their subscribers rather than a strong ad support system, so when I see information like this it indicates to me that mobile is becoming a legitimate platform that can stand on its own. As mobile begins to build subscribers it is a good sign that it will be around for a long time and media publications

will begin to shift their focus to that platform. The measurement aspect of mobile advertising is a plus when presented to the client.

Chapter 8:

Applications

When the term mobile advertising comes up in conversation most people think about advertising within mobile apps. The truth is that apps are a recent development along with advertising within them. Companies spend a majority of their allocated mobile advertising budget within apps. Do businesses place their advertising budget within apps because they believe apps will achieve a greater return on investment, or is it because they believe users actually prefer apps to browsers? This is a question that every agency will be confronted with while they create a campaign for their client. Although both are successful there still remains a colossal difference between the two.

Apps vs. Browsers

According to an eMarketer report published in October 2010, mobile users actually prefer browsers to apps. Keynote Systems, who polled mobile users for Adobe, gathered the data for this report. However, according to the poll, users preferred using a browser rather than an app in the following categories: product reviews, blogs, sports, news, video, and local entertainment. The only categories in which users prefer an app to a browser were with social networks, music and games.

This information comes as a complete surprise to me as a Smartphone owner. I think that most people would actually prefer the ease of use and reliability that apps offer to browser functionality. The performance breakdown of browser vs. app is useful information as advertising agencies contemplate incorporating mobile into a client's

communications plan. Based on the preceding information clients that specialize in a particular field, like retail for instance, should launch and promote a mobile site rather than an app (*Mobile Users Prefer*, 2010).

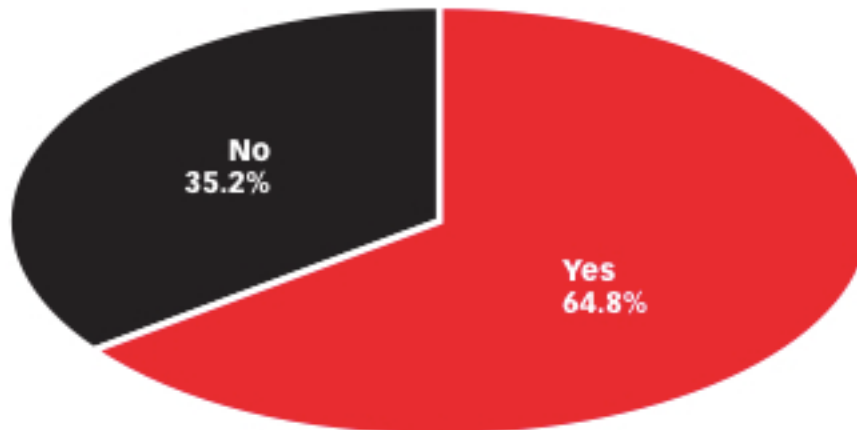
There's an App for that

There has been a drastic increase in the number of mobile apps that have been launched the past few years. All kinds of companies are beginning to create new apps and launch them. The number of apps created even spurred AT&T to develop an entire campaign with the tagline, "There's an app for that".

The exhibit below is a snapshot into a recent eMarketer study, in which eMarketer conducted a survey of 105 advertisers and agencies in 2009 that have yet to develop mobile apps, and asked if they planned on developing one in the future.

Exhibit 8.1

Publishers and Marketers* in North America Who Plan to Invest in Mobile Apps in 2010 (% of respondents)



*Note: n=105; *advertisers and agencies that have not developed mobile apps*
Source: DM2PRO and Quattro Wireless, "What's the Hap's on Apps?"
December 10, 2009

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www.eMarketer.com

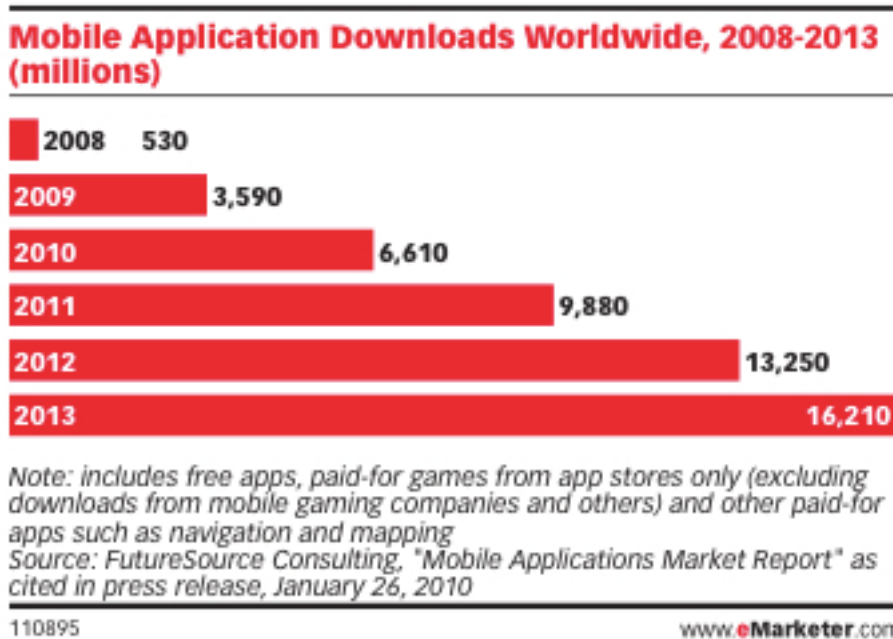
Out of the interviewees an overwhelming 64.8% responded they planned to invest in mobile apps in 2010. This is a landslide even though it is just a snapshot of the entire industry. The numbers speak volumes about what kind of technology advertisers see as worth investing in the future.

As the pie chart shows, apps are becoming an important part of an advertiser's marketing plan. Not only that, but the anticipated growth is coming from clients from all different industries. The different industries that have shown interest in developing apps include household products, restaurants, personal care, pet, and apparel brands, to name a few (Elkin, 2010). In the coming years I believe we will see a large growth of the number of apps from every industry.

How much for that app?

Companies are releasing more and more apps. The three key questions when a company launches an app are (1) whether the app should be free, (2) should there be a usage charge for the app, and (3) should revenue come through ad support within the app? The absolute number of app downloads worldwide is trending upwards, as you can see in the graph below.

Exhibit 8.2



As more apps are downloaded, consumers will spend more money on mobile apps. According to a March 2010 eMarketer report consumers will spend a projected \$6.2 billion in 2010 in mobile app stores (Elkin, 2010). This number is astonishing.

Considering the number of mobile app downloads is projected to double by the year 2013, I expect the dollar revenue to double as well.

Advertising agencies have to prepare themselves for the onslaught of questions clients will ask them about apps when developing a campaign. Should we invest in an app, a mobile site, or both? Even though this is sure to be a lengthy conversation, at the end of the conversation someone will be saying, “There’s an app for that”.

Chapter 9:

Case Studies

Throughout this next section I will go through seven case studies that display the current use and implementation of mobile advertising. These case studies highlight the different aspects of mobile advertising.

Jaguar/Land Rover

In February of 2009 Jaguar and Land Rover made an unprecedented \$1.6 million mobile buy through AdMob, who ran the ads. This expenditure is significant especially for a niche, luxury brand like Jaguar & Land Rover. The agency responsible for this media buy and creative development was Mindshare, which is headquartered in New York City.

Joao Machado the digital group director at Mindshare, justified the enormous mobile buy claiming, “it goes back to performance” (Chang, 2010). This one mobile buy represented about 60% of Mindshare’s total mobile budget allotted for the year, which is significant. There are a couple of reasons the agency Mindshare decided to make this mobile buy. Machado claims ability to “use it as a direct response tool” contributed to the decision (Chang, 2010).

Eric Bader, the managing partner of Brand in Hand, a mobile marketing company, claims that these types of buys will become more commonplace as time passes. He is quoted as saying, “The smaller scale of most buys of the last few years has not been in rational proportion to the growth of mobile audiences and interaction rates with mobile

advertising” (Chang, 2010). Keeping these types of buys in proportion with the growth of the audience is important. It is a good sign that mobile advertising will become a legitimate advertising channel when a luxury niche brand places that much money into one new media.

This case study represents a large luxury brand investing in mobile technology. These luxury niche brands typically do not invest in mobile advertising, so to see brands like Jaguar and Land Rover investing in mobile indicates the belief they have that mobile will be successful.

Hampton Hotels and Weather.com advertisements

Hampton Hotels launched a branding mobile campaign in July 2007. This campaign targeted business travelers on Weather.com’s mobile WAP site. The advertisements were concise and displayed when people searched for a city within the mobile Weather.com website.

Weather.com partnered with Dynamic Logic to judge the performance of the advertisements. The entire campaign was extremely successful. Some key metrics of the campaign are that people exposed to the ads saw a 13.2% increase in brand favorability and an 11.4% increase in stay consideration. The hotel industry is very perception based, and launching a branding campaign that can lift a potential customer’s perceptions is very important. This campaign’s main goal was to get people to choose Hampton Hotels over the cluttered competition, and it was successful. This was a highly targeted mobile campaign and achieved its impressive results by placing Hampton Hotels in the forefront of consumer’s minds (Interactive Advertising Bureau, 2008).

Greystripe and Golden Compass mobile campaign

Greystripe, an ad-supported mobile game and app distributor, ran a mobile advertising campaign in November and December 2007 for the New Line Cinema film “The Golden Compass”. While people were playing the downloadable games that Greystripe developed, full screen advertisements for the upcoming movie were shown. Greystripe used Dynamic Logic’s AdIndex to gauge the impact of the advertisements.

The campaign achieved a significant increase in movie awareness, from 42% to 61% to be exact. Interest in the movie increased from 43% to 53%, and enjoyed the largest increase in interest in the consumer’s aged 35-54. This campaign of simple display advertising within mobile games was successful and helped increase the awareness of the movie as well as the favorability among different key demographics.

Dynamic Logic’s conclusion at the end of the case study was that, “entertainment advertisers could benefit by continuing to leverage the mobile medium to influence consumers” (Interactive Advertising Bureau, 2008). Simple ad-supported mobile games hold a possibility for significant growth.

Samsung and LED 3D mobile promotion

In 2010 Samsung and its agency MediaVest partnered with AdMob to promote their new LED 3D televisions. Samsung’s target audience for the promotion was male sports fans 18-49. AdMob has a strong network of premium sports sites that connect this demographic to the upcoming Samsung LED 3D TV’s.

This campaign was a perfect example of how mobile advertising can be a successful solution for brand awareness as well as being easily measurable. The

advertising campaign was measured through Insight Express. According the results, consumers exposed to the campaign reported a “27% increase in intent to purchase a 3D TV and a 117% increase in agreement with the statement ‘Samsung bought the first 3D TV to the market’” (Google, 2010).

This case study is a perfect example of how mobile can be utilized to target a specific demographic, in this example male sports fans ages 18-49. The 117% increase in agreement with the statement “Samsung brought the first 3D TV to the market” is a very significant goal for the entire campaign. 3D technology is new, and to be recognized as the leader in that field is great brand differentiation result.

Keystone Light Case Study

Keystone Light launched a mobile campaign in 2009 with the goal of increasing their market share among 21-29 year old men who are heavy consumers of low cost beer but also enjoy taste. The premise of the campaign asked consumers to visit the website www.kestonelightbeer.com/fsn in order to win a road trip for two to a MLB game of their choice.

The campaign was promoted through television spots as well as through SMS messaging. After the score was announced at the end of the game via a consumer’s mobile device the ad would ask them to visit the website. The campaign achieved great results, accomplishing a completion rate of 71% and actually drove 51% of the traffic to the website, compared to the 49% the television promotions did. The completion rate is based on a user completing the legal requirements at the end of the SMS campaign.

This was Keystone's first mobile campaign, and I find it interesting that the campaign, which was run alongside television promotion, actually outperformed TV. It is hard to imagine a beer company, which is traditionally advertised only through traditional media, would actually perform better in the mobile space. Considering the success this campaign had in the mobile space, I expect the MillerCoors company, which owns Keystone Light, to run similar campaigns in the future (Elkin, 2009).

Jiffy Lube & Geo-Targeted Case Study

Jiffy Lube, a popular oil change company, decided to utilize the mobile coupon space in September 2009. Their goal was to increase sales among the 18-24 year old demographic that never think about oil changes until it is last minute. While researching the correct route to take with the campaign, Jiffy Lube decided it would be great to utilize the mobile space considering the time this demographic spends on their mobile phones.

Jiffy Lube sent geo-targeted text messages to consumers offering a website opt-in coupon. This campaign opened a conversation between the brand and consumer as well as garnered more new customers. Around 50% of the consumers that redeemed the coupons were new customers.

Jiffy Lube enjoyed the campaign because of its simplicity and measurability. This was one of the first case studies I read utilizing geo-targeted mobile technology and it occurred in 2009. This timeliness of this campaign and significance of the case study has present day impact (Khan, 2009).

Jeep Tripcast App

Jeep partnered with local Austin advertising agency Tocquigny to launch a new app, Tripcast, in July 2010. This free app tracks a user's road trip as it is underway and places the user's progress on a map other consumers can see via a website. The app helps friends, family, and fellow road trip enthusiasts track the user's current progress during a road trip. The user adds interest by placing pins along their trip route, leaving behind notes, audio clips, or video clips about their trip (Tocquigny, 2010).

I had an opportunity to meet with Craig Saper, the Creative Producer at Tocquigny on the project about the Tripcast app. He told me how the goals of the app were to appeal with the core Jeep users and match the current technology trends with the current behaviors of the market. This app combines the fun of the Jeep brand and thrill of road trips into one fun app.

The launch of the app was combined with advertising on Facebook as well as traditional print advertisements that ran in *USA Today*. The app was a success among the targeted demographic and has since led to more mobile business for a local Austin agency.

Chapter 10:

Conclusion

There is no denying the fact that mobile advertising is in a growth phase. Advertisers and marketers are tasked with the challenge of matching current technology with current behavioral trends of consumers to maximize exposure for their clients. This is not an easy task but this professional report contains the evidence that the inclusion of mobile as an advertising channel in agency media plans can accomplish agencies objectives for their clients.

The versatility of mobile advertising

As mobile advertising is becoming the most relevant solution for clients needs, agencies need to be prepared with the knowledge of how to accomplish a successful mobile campaign. Mobile advertising is extremely versatile considering it is not specific to a demographic or product category. Other channels prove to be more effective for specific product categories, but mobile advertising is versatile and can be effective for all product categories. All product categories can utilize mobile advertising to accomplish their goals.

Mobile advertising has three forms (1) SMS, (2) display, and (3) traditional media with a mobile CTA. Other traditional advertising channels have one form of advertising, which limits their reach. This versatility provides mobile advertising distinctiveness compared to other channels of advertising. Mobile advertising is poised to receive more qualified impressions in situations in which traditional advertising is limited.

Enjoys growth during the Recession, ready to continue momentum

Mobile advertising was one of the only advertising channels that saw growth during the recession. Overall advertising revenue dropped from \$77 billion in 2008 to \$67 billion in 2009 (2009 U.S. Ad Market, 2010). The advertising industry lost \$10 billion in a year over year comparison, which forced advertising agencies were to tighten their budgets. The channel that took the worst hit was television and televisions loss was the Internet and mobile's gain. Mobile spending is set to reach \$12 billion this year, up from \$2.6 billion in 2006 (Swallow, 2010). This increase in mobile spending occurred during the recession. Agencies have confidence this channel will be successful and backed it up by investing more money into it every year.

Increase in Smartphone shipments

By 2013 there will be more Smartphone shipments than PCs worldwide. More Smartphones than PCs means a greater advertising investment within that channel. The increase in Smartphone shipments causes a shift in the market that is sure to change every media plan. Agencies will be forced to increase the staff of their development teams to properly solve clients' problems with more mobile-related solutions.

The business model for mobile content is changing. Previous business models for content within traditional advertising channels are subscriber supported, while mobile content up to this point has been largely ad supported. Experts project the future business model of mobile content will be ad and subscription supported, validating the trust marketers have in the channel's growth. Consumers are spending more time on mobile devices which influences where agencies place their advertisements. As time spent in

traditional channels decreases and increases within mobile channels so does the demand for mobile content creation.

Apps

The form of mobile advertising that is most set for growth is apps. The number of app downloads is extraordinary, set to hit 16 billion by 2013. This amount of rapid growth in one category will create a lot of opportunities within the advertising industry. There will be an increased demand for app development within agencies, which will in turn create job opportunities. In fact in a survey of 105 marketers whose clients did not have a mobile app 65% are on record as stating they will invest in an app for their client within a year (Elkin, 2010). That statistic further validates the growth of advertising within mobile apps.

Impact on social media

Consumers are spending more time within social media. This increase in time spent is beginning to affect the process in which consumers absorb media. Facebook and Twitter experienced over a 110% increase in usage via mobile phones from January 2009 to January 2010 in a year over year comparison. More users are accessing these networks through their mobile phone signifying that social networks are an increasingly important part of consumer's life. Advertising agencies that advertise within social media for their clients are likely to combine mobile advertising tactics with their social media advertising in the future. Increased qualified impressions within this channel will validate its strength as an advertising channel moving forward.

Location based social networks are a fresh addition to the world of social media. These networks were founded in 2009 but have enjoyed rapid growth over the past couple of years. More companies are utilizing this channel for promotions. Big name retailers Gap, Pepsi, and Jiffy Lube have all conducted promotions within location based social networks over the past two years. Successful retailers taking a risk to run a promotion within a non-traditional channel indicates their belief it is a legitimate channel to gain new customers. Location based social networks which can only be accessed by mobile devices not only assist in gaining new customers but in also appealing to targeted demographics. Mobile advertising is extremely popular among the 25-39-age range, so companies targeting this age range should utilize this channel for promotions.

Mobile advertising is not a channel that only small to medium sized businesses utilize. Jaguar/Land Rover, Hampton Hotels, Samsung, Keystone Light, and Jeep all have success stories executing mobile advertising campaigns. These success stories support the fact that mobile advertising will be considered one of the main advertising channels in the future.

Mobile advertising exploded onto the scene a few years ago but in a short time it has proven it is one of the most versatile and successful advertising channels. Consumers are spending more time on their mobile devices and there is a cosmic shift occurring within traditional advertising channels. Mobile advertising is a highly measurable channel that will not disappear quickly. Advertisers have only begun to comprehend the capabilities of mobile advertising. They are beginning to recognize its importance in media plans for their clients. If used correctly mobile advertising can have an enormous

impact on the bottom line for a client and most importantly maintain that advertising remains on the forefront of cultural changes.

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