



More than Talk: Action in Mobile Marketing

A Research Collection for Marketers



MARKETING CHARTS
DATA INSIGHTS

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More than Talk: Action in Mobile Marketing

“**More than Talk: Action in Mobile Marketing**” is part of Watershed Publishing’s Data Insights series featuring trends, data and research. This collection brings together months of surveys, reports and insights released by nationally recognized research and marketing organizations focused on what is happening with mobile marketing. It is a time saver for the busy marketing professional.

The charts in this collection are **ready to use, download, format**, and otherwise support your marketing goals. **Feel free to share** the whole presentation or any slide, with your colleagues and business partners, but **please preserve credits** to our sponsor, **HubSpot**, our research partners who provide the source data, and our links to MarketingCharts.com.



Gone are the days when talking to someone was the prime reason to use a phone. In fact, if you own a smartphone, chances are you use it far more for things other than calling.

And that's big news for marketers.

In **“More than Talk: Action in Mobile Marketing”** MarketingCharts has amassed a quantity of data that is invaluable to companies serious about mobile marketing.

The section on Mobile Growth provides all the proof you need about the rising surge of smartphone users.

In Mobile Actions you'll find out how these consumers are using their smartphones.

But who are these people? In Mobile People you'll get the gender, ethnic and generational breakdowns.

And in the last section on Mobile Marketing, you'll find out what everyone is spending trying to reach this fast-growing audience.

There are 53 data slides and accompanying analysis in this eBook, more than enough current data to support your mobile marketing efforts.

Enjoy,

The HubSpot team





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Mobile Growth

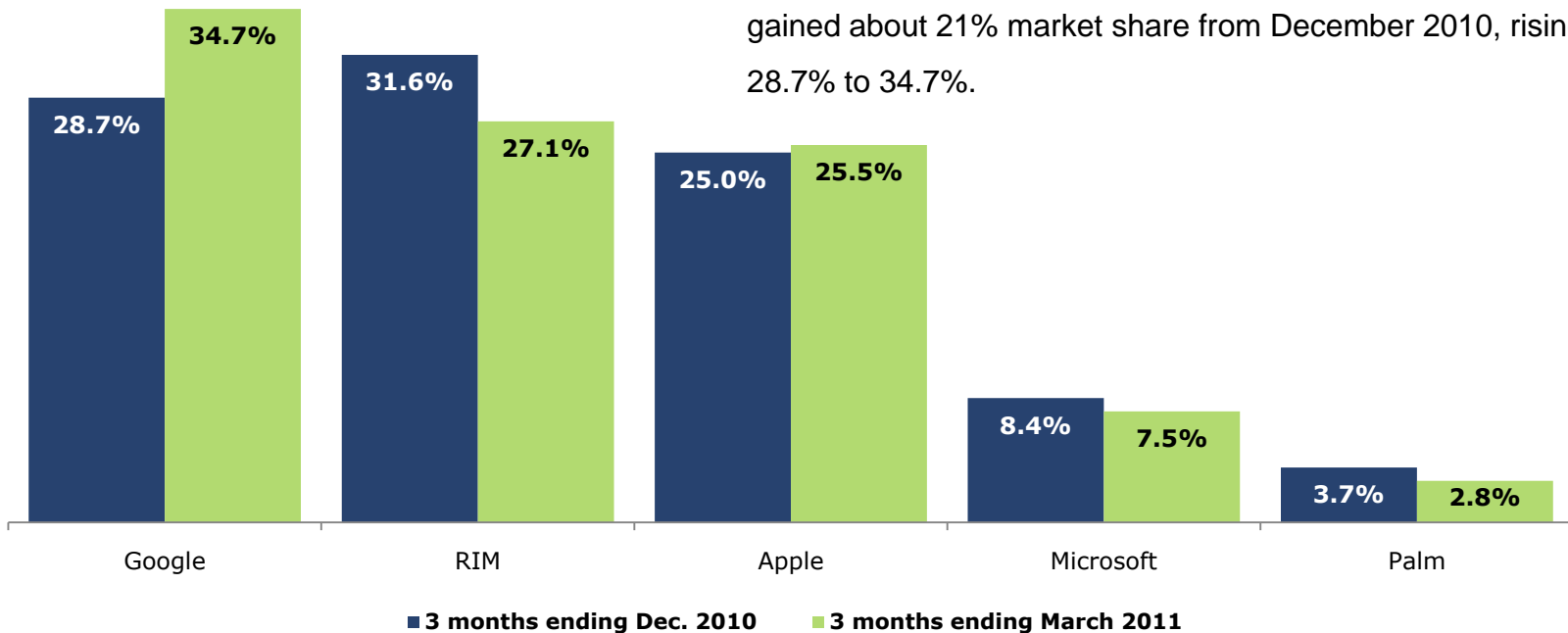
72.5 Million Owners and Growing

U.S. Smartphone Market, by Platform

Dec. 2010-March 2011, 3-month average share

Source: comScore

MobiLens data [from](#) comScore released in May indicates 72.5 million people in the US owned smartphones by March 2011, up 15% from the preceding three-month period. Google Android continued its trend of luring US smartphone subscribers from RIM Blackberry, though RIM retained its number two position. Android gained about 21% market share from December 2010, rising from 28.7% to 34.7%.

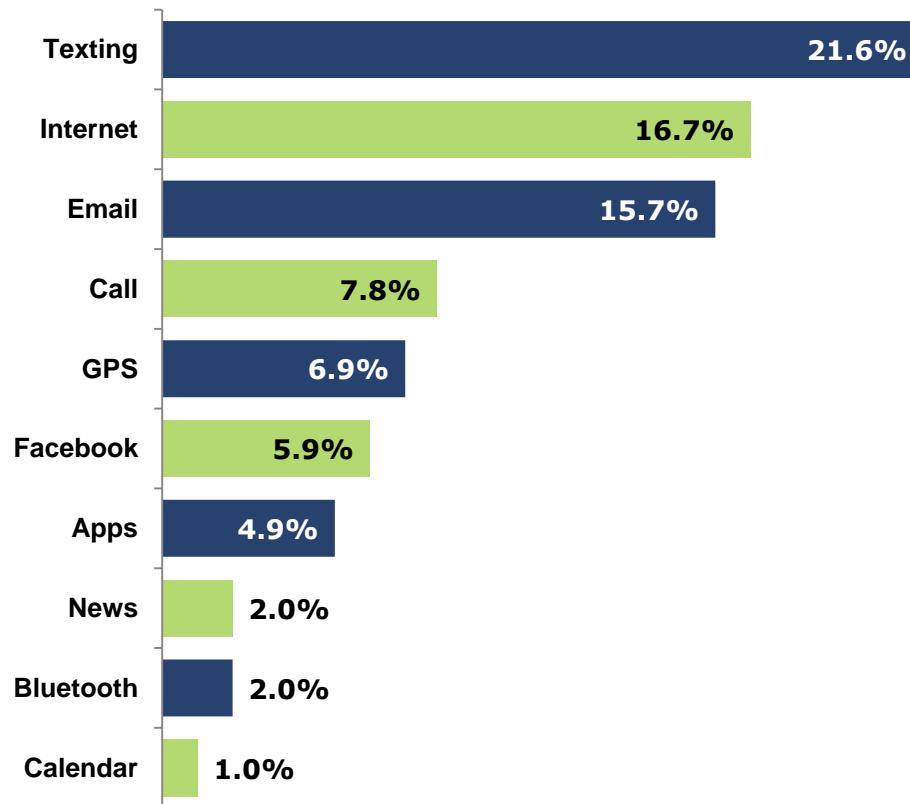


Ranked 4th: Making Phone Calls

Top 10 Essential Smartphone Functions

May 2011, % of respondents

Source: Prosper Mobile Insights



Prosper Mobile Insights asked smartphone users what smartphone function they cannot live without, and one in five (22%) said texting, followed by internet (17%) and texting (16%).

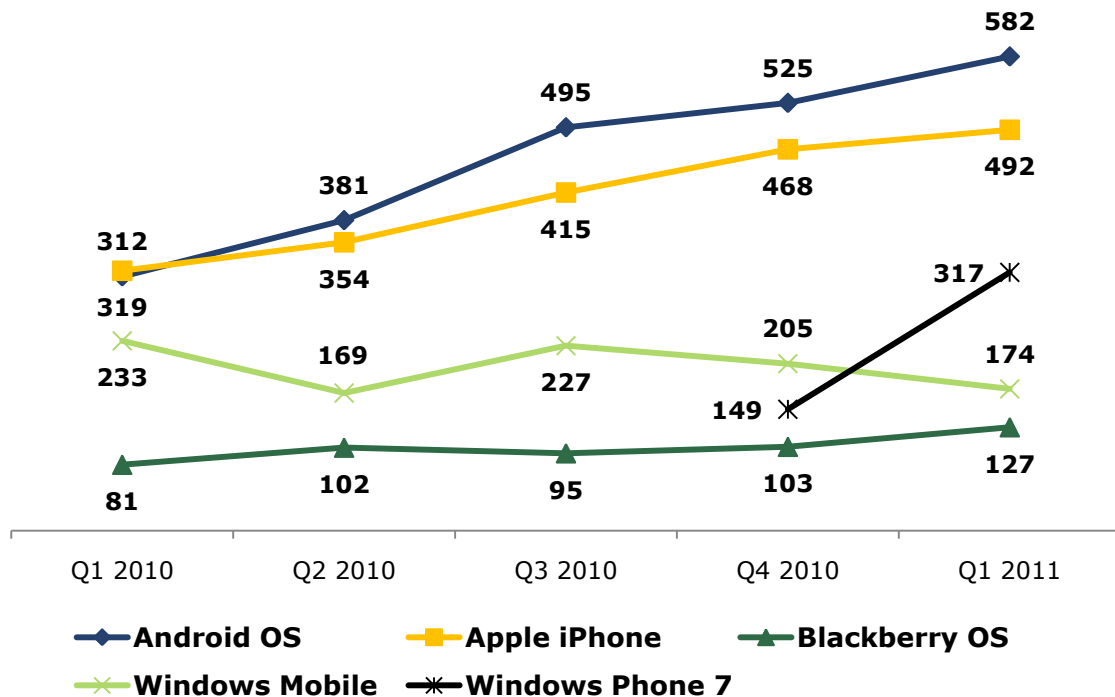
Interestingly, showing just how diverse a device the smartphone has become, only 8% of users cited making phone calls as an indispensable feature of a smartphone – but it still was ranked fourth overall.

"Data Tsunami" – 89% Growth Y-o-Y

Data Usage in MB by Mobile Operating System

Q1 2010-Q1 2011, Average MB per user

Source: The Nielsen Company



It is a mobile "data tsunami" [according to Nielsen](#), with app-friendly OS phones at the epicenter. Consumers with iPhones and Android smartphones consume the most data: 582 MBs per month for the average Android owner and 492 MBs for the average iPhone user.

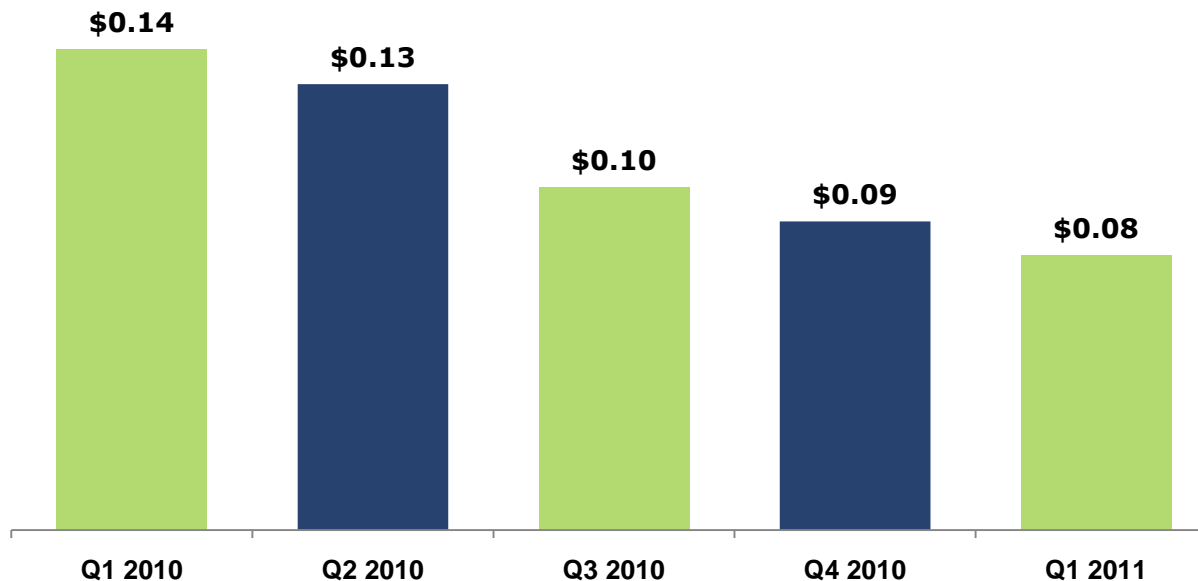
Overall, in the last 12 months, the amount of data the average smartphone user consumes per month has [grown by 89%](#), from 230 MB in Q1 2010 to 435 MB in Q1 2011.

Total Data Costs Drop 43% YOY

Smartphone Data: Effective Cost per MB

Q1 2010-Q1 2011, Total data charge/Data consumption

Source: The Nielsen Company



Perhaps more importantly, the amount the average smartphone user pays per unit of data has dropped [by 43% percent](#) in the last year, from 14 cents per megabyte (MB) to 8 cents per MB, [according to](#) The Nielsen Company.

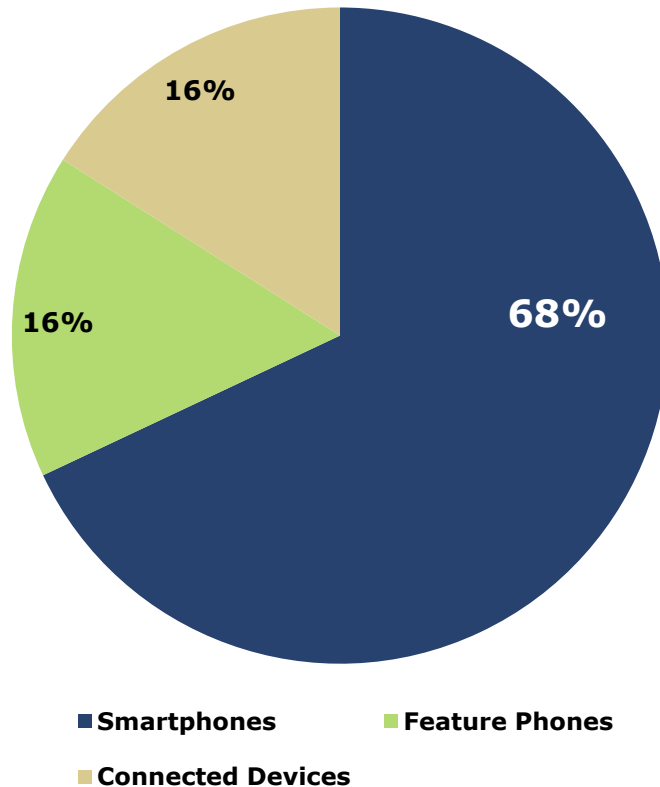
Even as data usage has almost doubled, most users are paying around what they did a year ago for data – meaning a lower cost per unit of data consumed.

Smartphones: 68% of Impressions

Connected Device, Category Mix

April 2011, % share

Source: Millennial Media



Combining smartphones, feature phones and connected devices, Millennial Media finds that smartphones accounted for more than [two in three mobile impressions](#) onto the Millennial mobile advertising network in May 2011. Feature phones (17%) and connected devices (16%) were responsible for virtually equal shares.

Within connected devices, mobile gaming devices and MP3 players combined to generate 70% of the connected device impressions, and tablets accounted for another 29%.

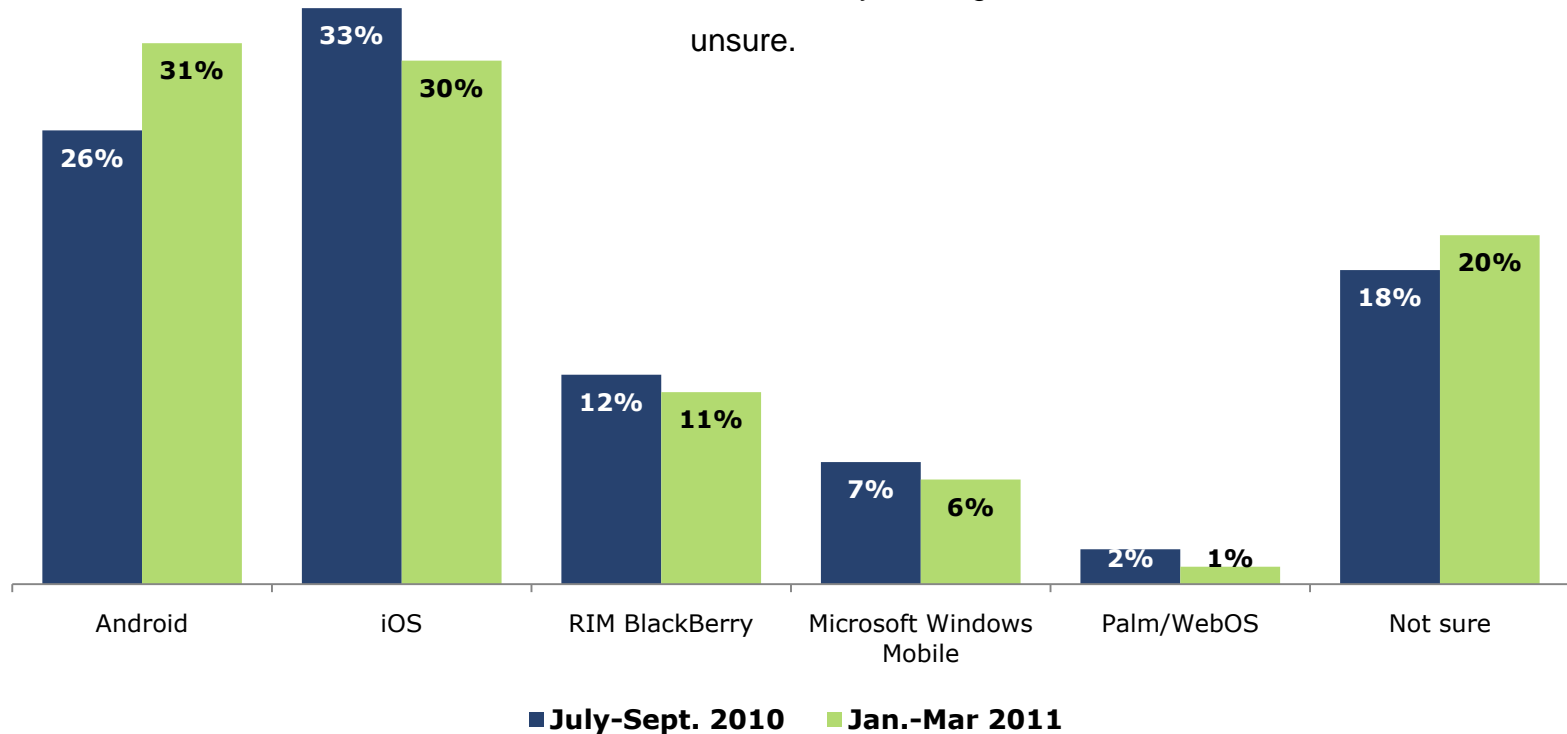
Next Smartphone, Android or iOS?

Desired OS of Next Smartphone

2010 v. 2011, % of consumers who plan to purchase new smartphone

Source: The Nielsen Company

[Nielsen data](#) shows that Android has taken the lead on Apple iOS as the most desired OS for consumers planning on getting a new smartphone in the next year. 31% of consumers desire the Android OS, narrowly beating the 30% who want iOS. About one-fifth remain unsure.

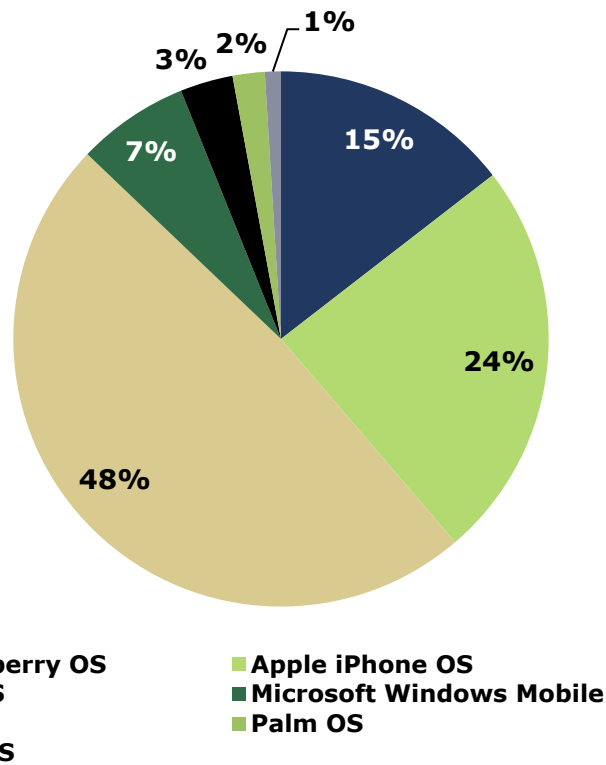


Android Gets Half of Recent Sales

U.S. Smartphone Market Share, Recent Acquires

March 2011, % of US mobile phone subscribers

Source: The Nielsen Company



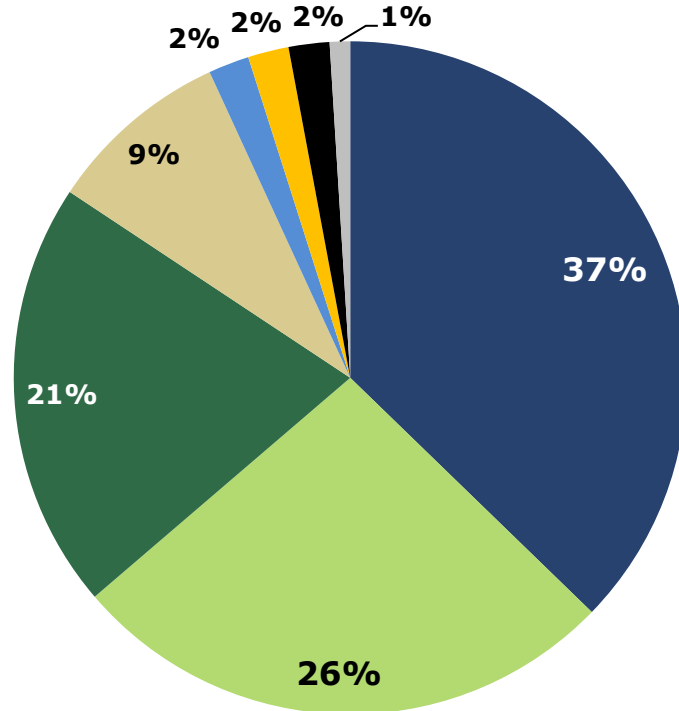
Nielsen analysis indicates the dynamics around desired future smartphone OS [are already translating into sales](#). Half of those surveyed in March 2011 who indicated they had purchased a smartphone in the past six months said they had chosen an Android device. Another quarter of recent acquirers said they bought an iPhone and 15% said they had picked a Blackberry phone.

Overall, Android Lead is Smaller

U.S. Smartphone Market Share

March-May 2011, % of US mobile phone subscribers

Source: The Nielsen Company



When Nielsen measures market share according to [all mobile phone subscribers](#), Android continues to be the most popular smartphone OS with 38% percent of smartphone consumers owning Android devices, Apple iPhone that has shown the most growth recently.

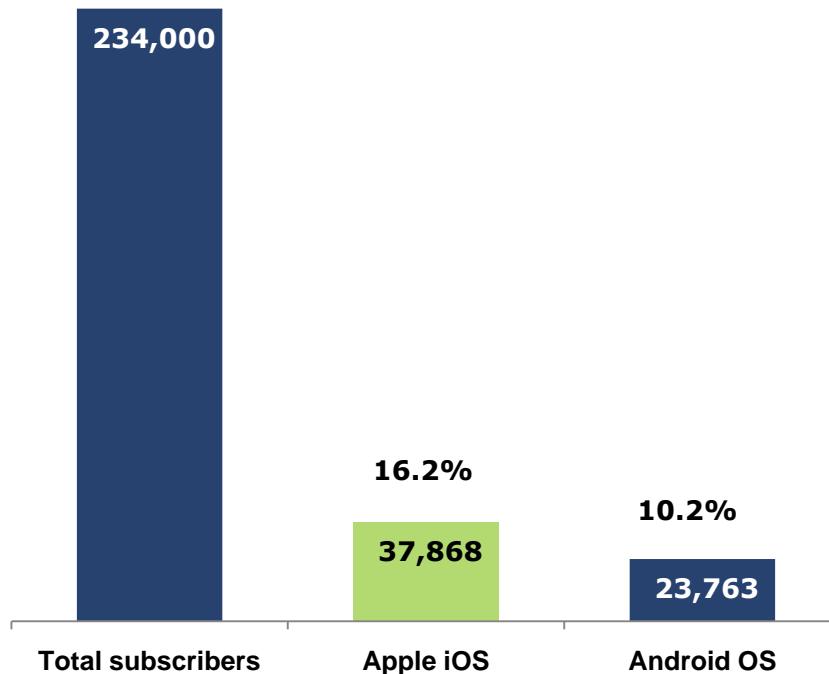
- Android OS
- Apple iPhone OS
- RIM Blackberry OS
- Windows Mobile
- Other
- Windows 7
- Symbian OS
- Palm / Web OS

Apple iOS Has More Share of All Devices

Apple iOS v. Android OS across All Mobile Devices

December-February 2011, Total base (000) / % of subscribers

Source: comScore



Despite the Android lead in smartphone market share, when examining [the total reach of the Apple iOS platform](#), which resides on iPhones, iPads and iPod Touches, the combined platform reach of 37.9 million among all US mobile phones, tablets and other such connected media devices, outreaching the Android platform by 59%.

Android platform has almost 23.8 million users across all devices. In addition, 14.2% of iPad users had Android phones.

This report from comScore released in April measured the two platforms across three months.

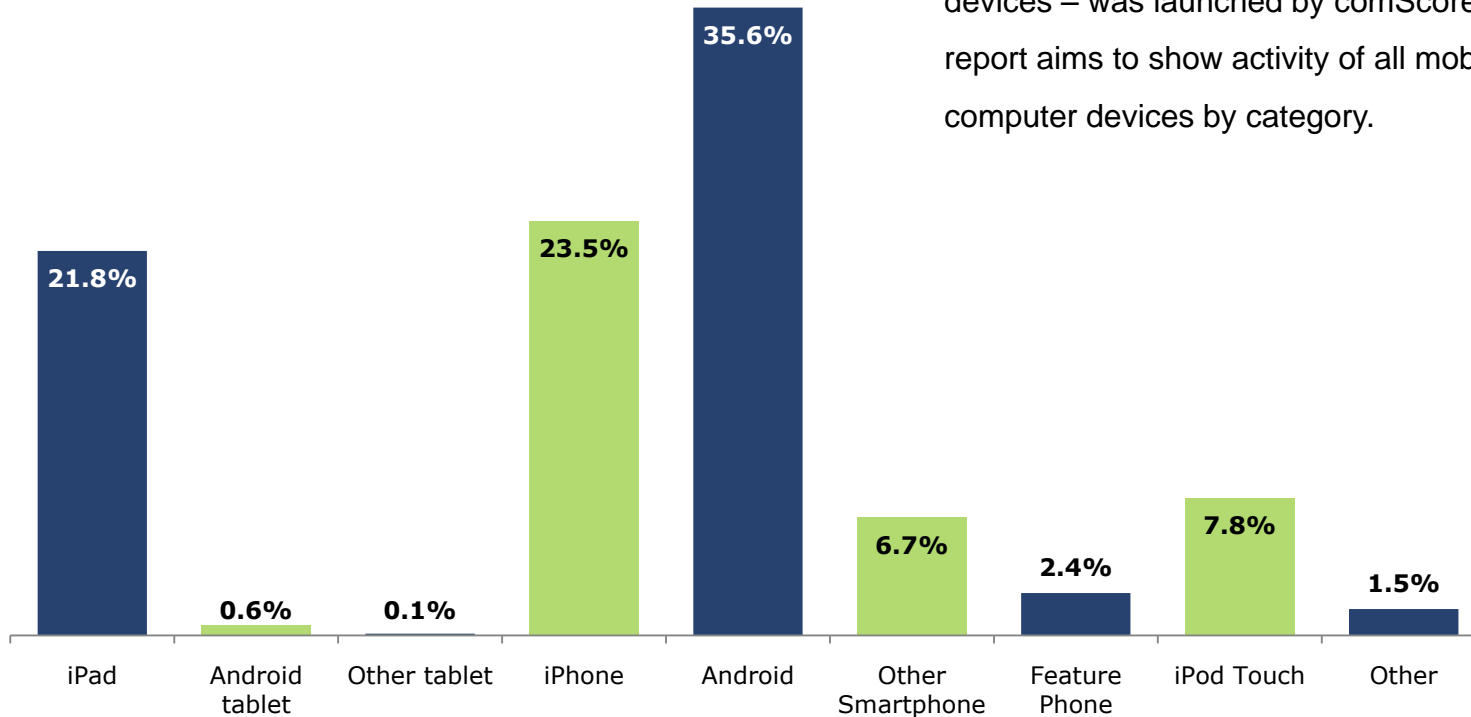
Breakdown of Non-Computer Traffic

U.S. Non-Computer Device Traffic

May 2011, % share

Source: comScore

A new service reporting on [digital traffic by device](#), – including mobile phones, tablets, music players, e-readers, gaming devices, and other web-enabled devices – was launched by comScore in June. The report aims to show activity of all mobile and non-computer devices by category.



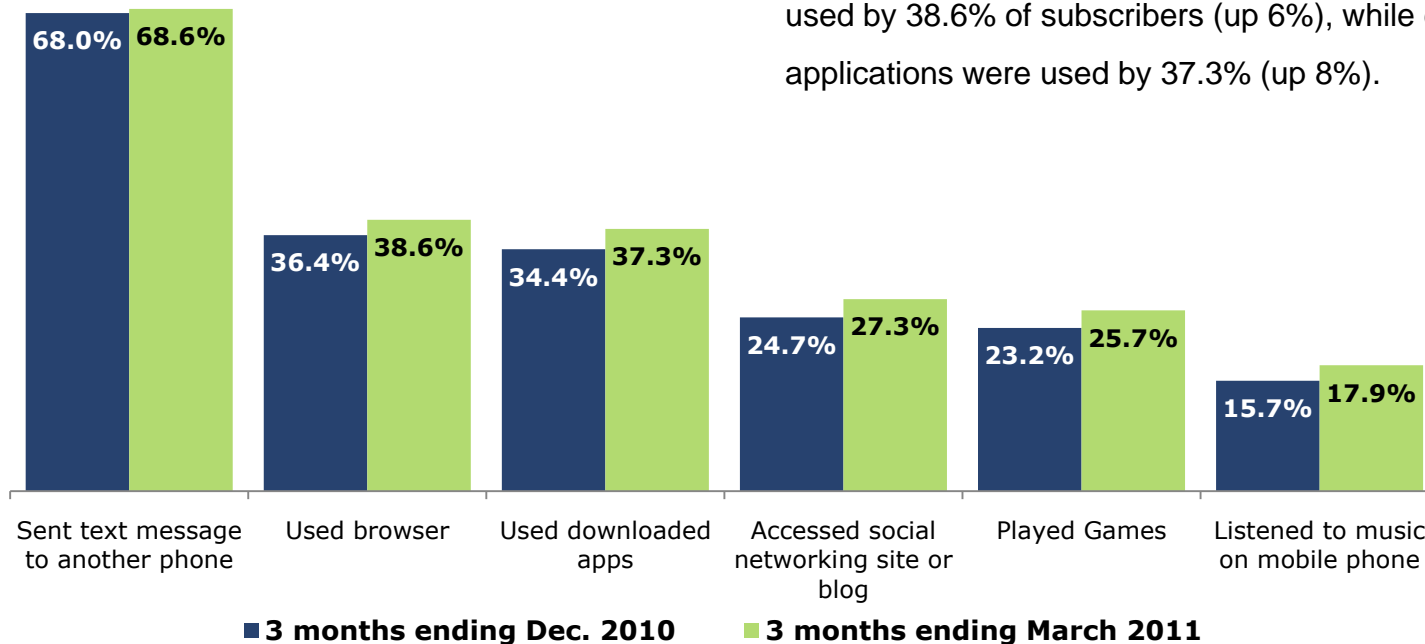
Music Listening Up 14%, Surfing Up 6%

Mobile Content Usage

Dec. 2010-March 2011, 3-month average share

Source: comScore

In a detailed look at usage, comScore [data](#) shows that while using the text-messaging feature on a mobile device remains the most common mobile activity, listening to music had the highest growth rate, rising about 14% from December. In addition, browsers were used by 38.6% of subscribers (up 6%), while downloaded applications were used by 37.3% (up 8%).



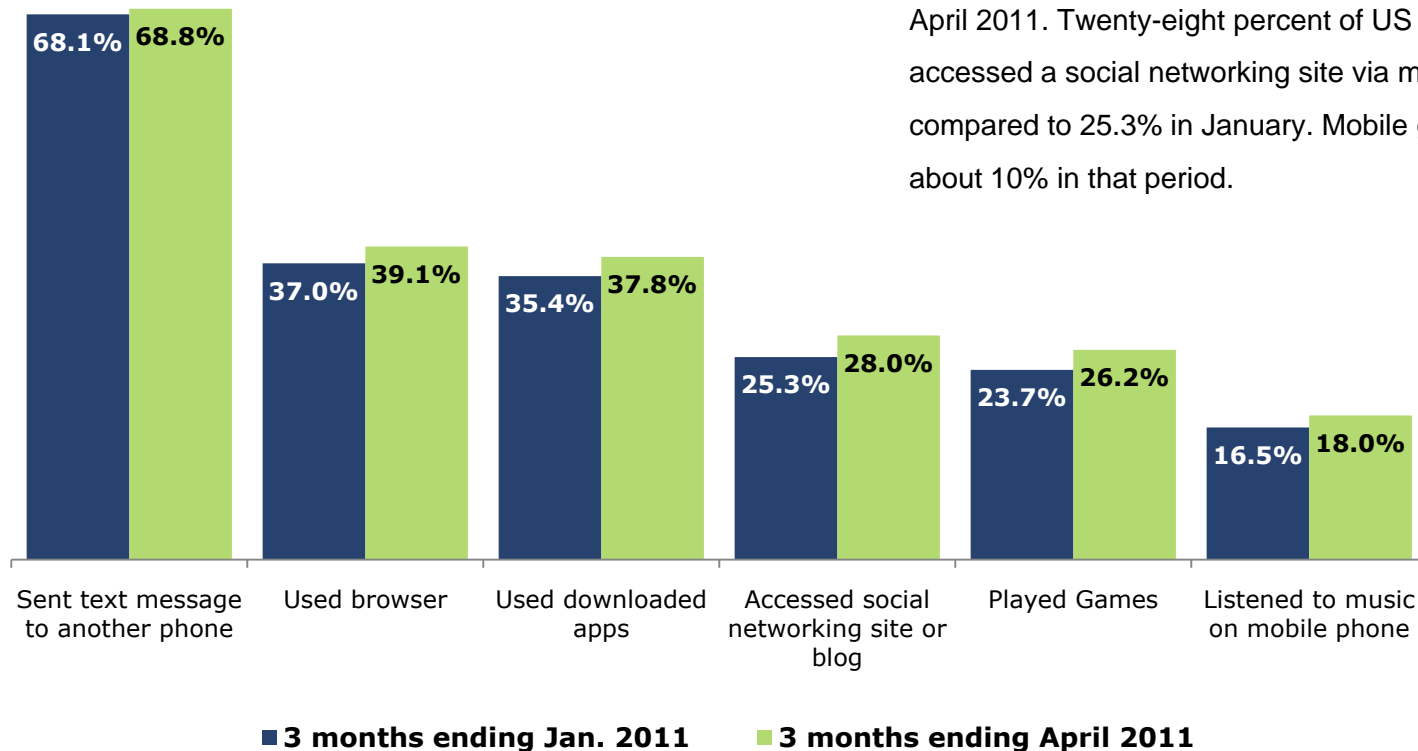
Mobile Social Networking Up 10%

Mobile Content Usage

Jan. 2011 v. April 2011, 3-month average share

Source: comScore

By the next month, the frequency of activities such as mobile social networking [grew about 10%](#) between January 2011 and April 2011. Twenty-eight percent of US mobile subscribers accessed a social networking site via mobile phone in April, compared to 25.3% in January. Mobile gaming also grew by about 10% in that period.



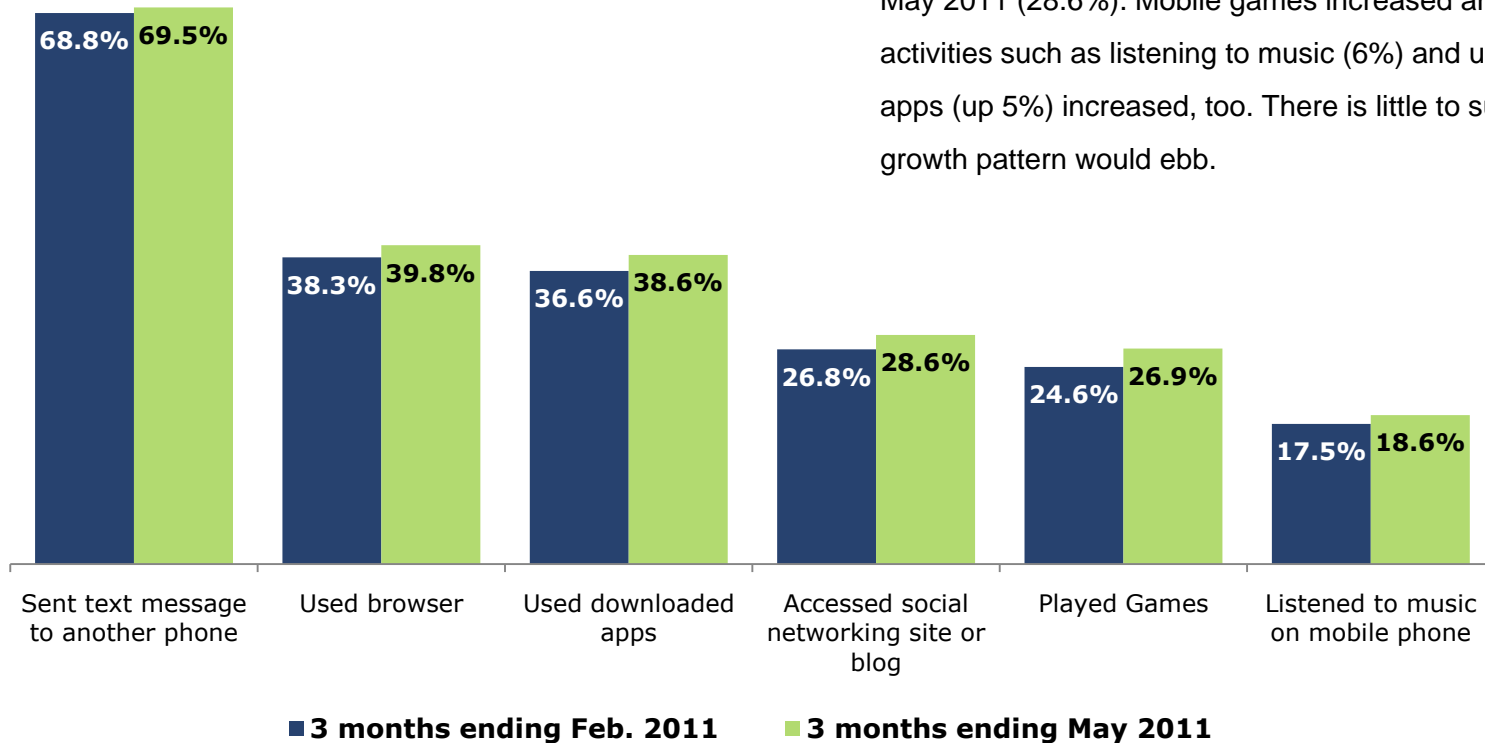
All Growth Solid between 5%-10%

Mobile Content Usage

Feb. 2011 v. May 2011, 3-month average share

Source: comScore

In its next [report](#) of 3-month averages, comScore finds that mobile social networking is up another 7% for the period ending May 2011 (28.6%). Mobile games increased another 10%, and activities such as listening to music (6%) and using downloaded apps (up 5%) increased, too. There is little to suggest that the growth pattern would ebb.



76% Use Location Check-in Services

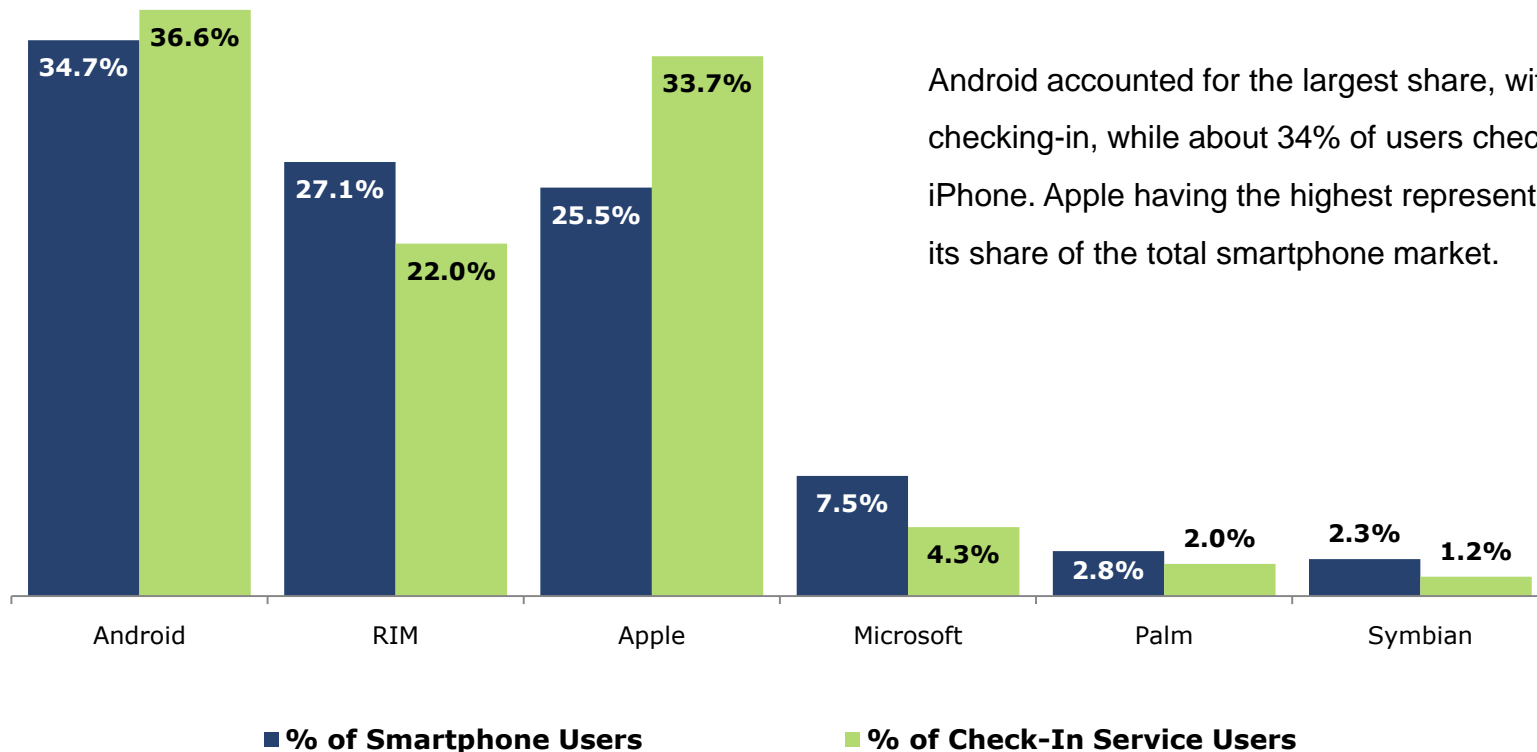
Devices Used to Watch Video Content

March 2011, % of U.S. mobile phone subscribers

Source: comScore

In total, 16.7 million mobile subscribers, including 12.7 million smartphone subscribers (76% of the smartphone owners), used location-based check-in, [according to](#) comScore.

Android accounted for the largest share, with about 37% checking-in, while about 34% of users checked in from an iPhone. Apple having the highest representation relative to its share of the total smartphone market.

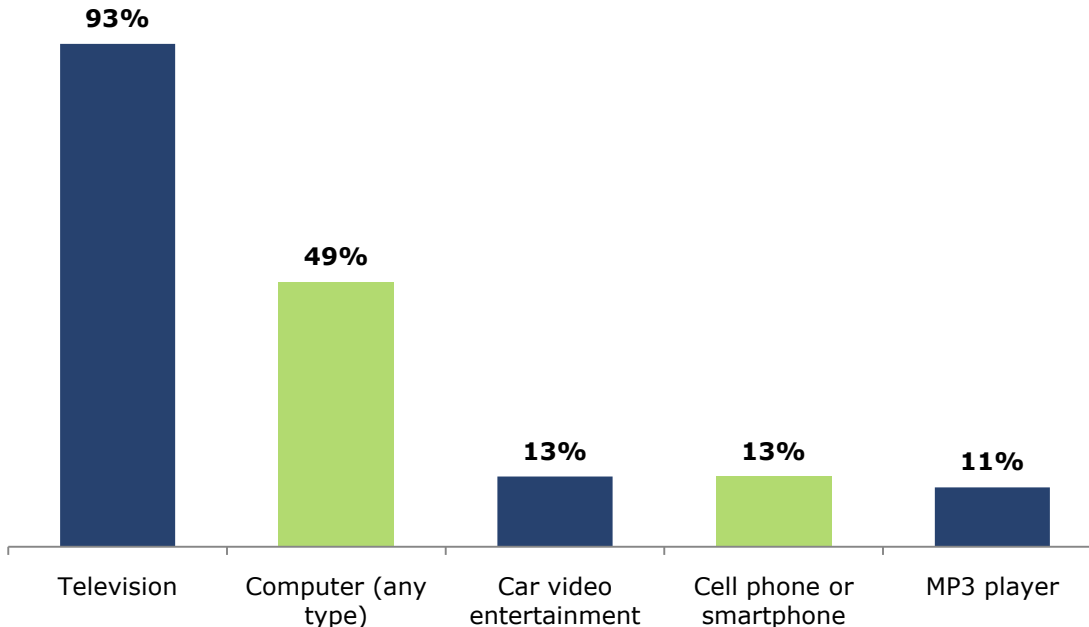


Phone Video Viewing Equal with In-Car

Devices Used to Watch Video Content

May 2011, % of U.S. households

Source: Consumer Electronics Association



While television remains the most popular device for video content by a large margin, cell phones and smartphones are currently used to watch video by 13% of households, on equal footing with car video entertainment, [according to](#) the Consumer Electronics Association (CEA).

It is worth noting that 31% of households view free video content on YouTube, and another 27% use free online video providers such as Hulu.



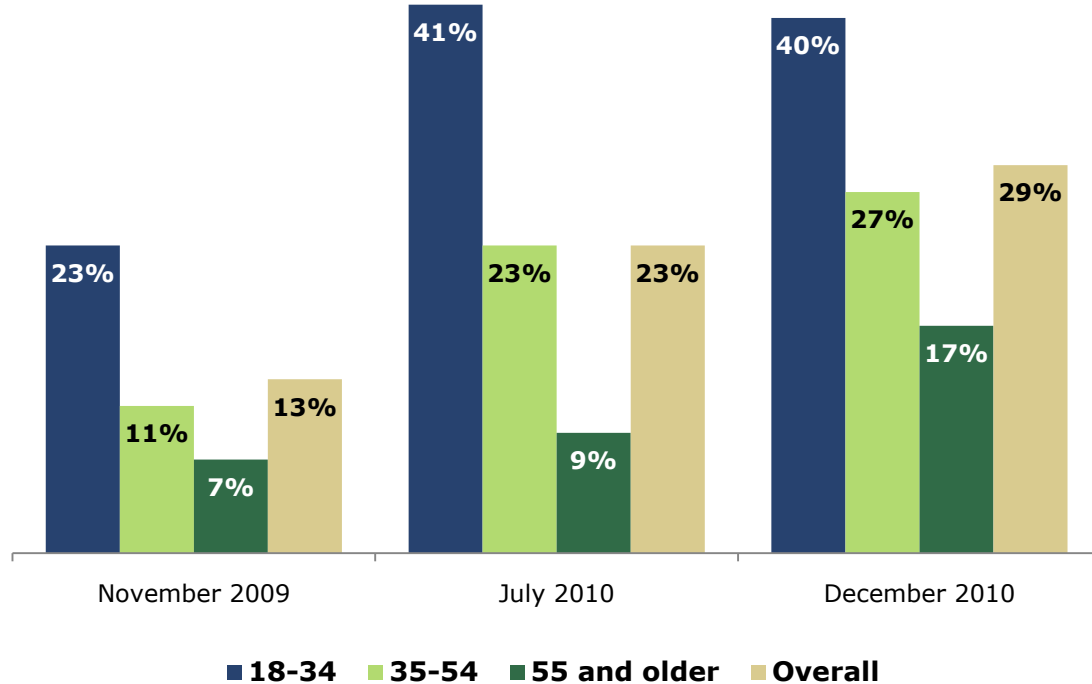
Mobile Actions

123% Growth in Mobile Purchasing

Consumer Trend in Mobile Purchases

2009-2010, % of consumers making 1 or more m-purchase

Source: Oracle / ATG



Oracle and ATG research finds that three in 10 (29%) US consumers have made at least one purchase via mobile device -- 123% more than the 13% of consumers in November 2009.

40% of consumers age 18-34 had made a mobile purchase as of December 2010, up 74% from 2009. 27% of 34-54-year-old consumers had made a mobile purchase as of December 2010, an increase of 145% from 11% 13 months earlier.

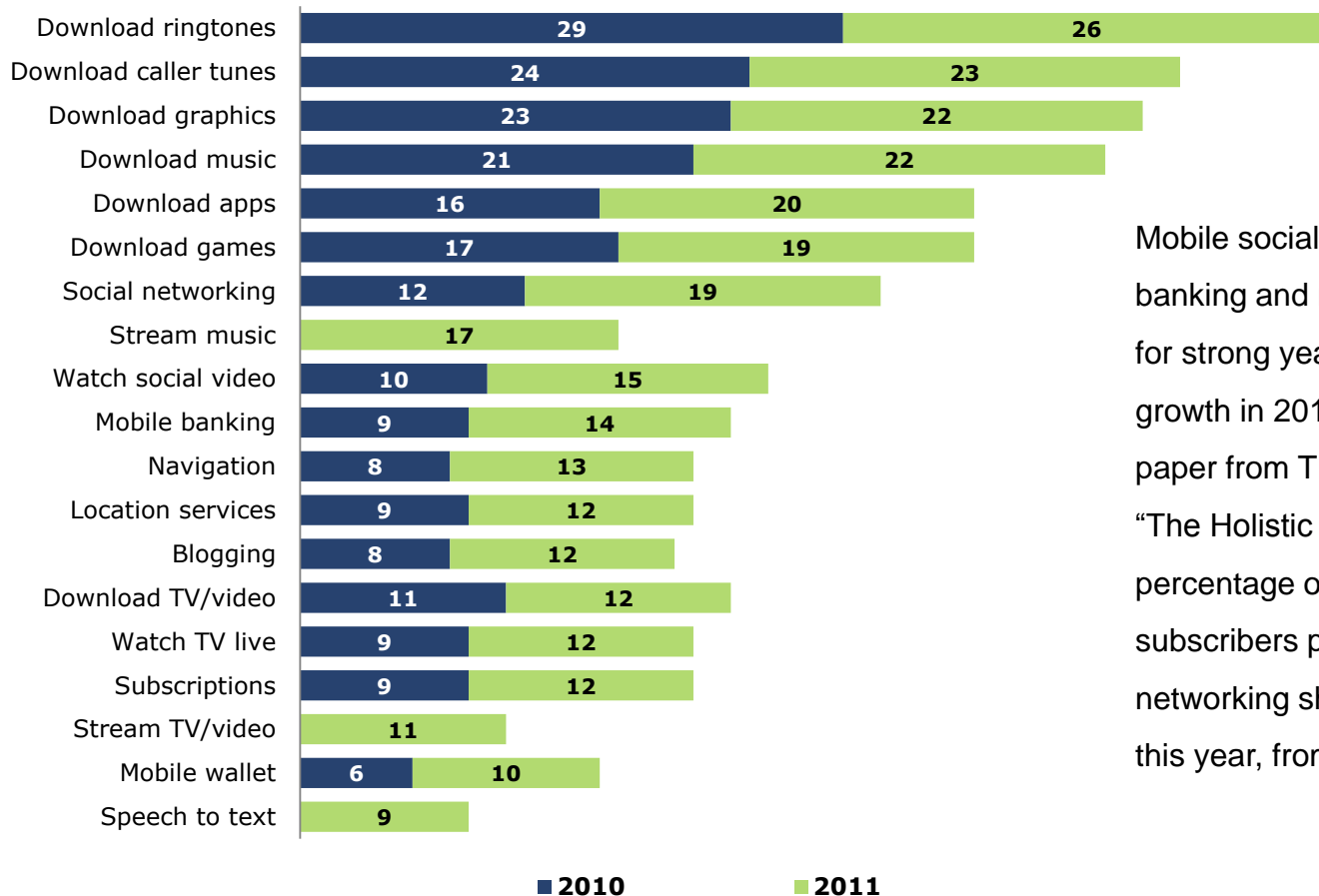
While only 17% of consumers 55 and older had made a mobile purchase in 2010, it's up 142% from 7% recorded in 2009.

Mobile Banking, Navigation to Grow

Consumer Mobile Platform Activities

2010 v. 2011, % of respondents

Source: TNS Mobile Life



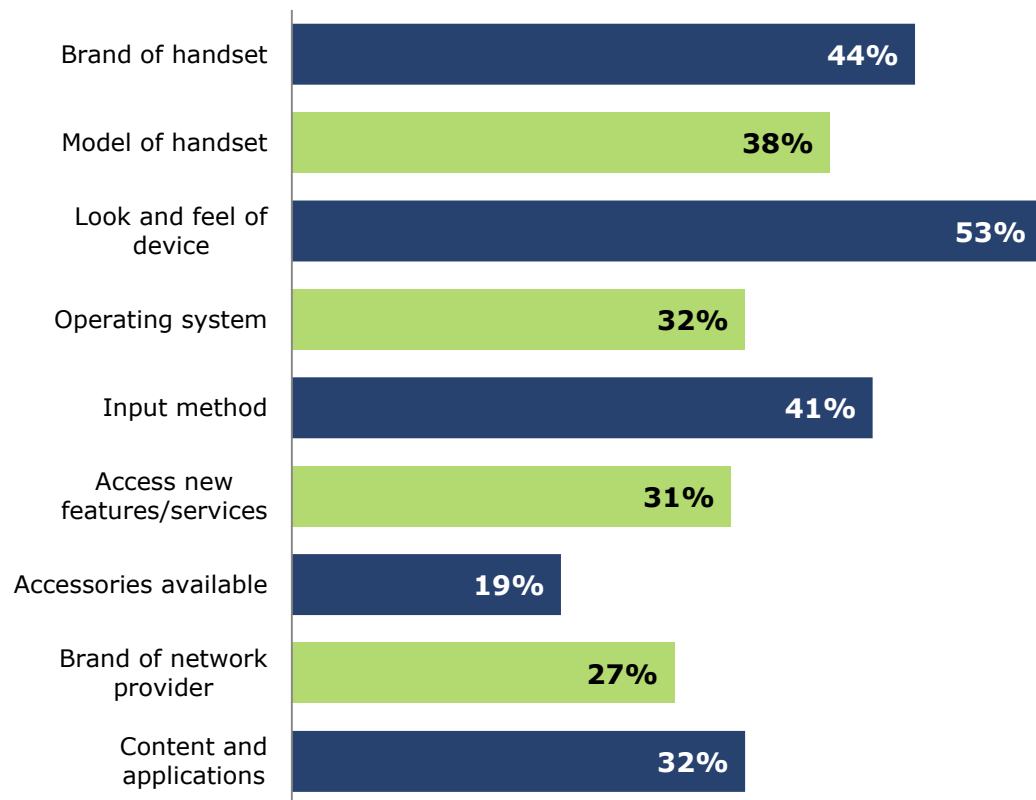
Mobile social networking, along with banking and navigation, are poised for strong year-over-year global growth in 2011, [according to](#) a white paper from TNS Mobile Life. from “The Holistic Portfolio” indicates the percentage of global mobile subscribers performing social networking should rise about 58% this year, from 12% to 19%.

Device “Look” and Brand are Influential

Mobile Purchase Influencers in Mature Markets

May 2011, % of respondents

Source: [TNS Mobile Life](#)



The TNS report also found that across global markets, [headset brand](#) is considered an important purchase factor by the highest percentage of consumers. In developing markets, the brand had much more importance -- cited by 86% of consumers in emerging Tier II markets and 70% of consumers in emerging Tier I markets.

Only 44% of consumers in mature markets consider this a top criteria. Consumers in mature markets are more likely to consider look and feel of device, with 53% indicating that this is a top purchase influencer.

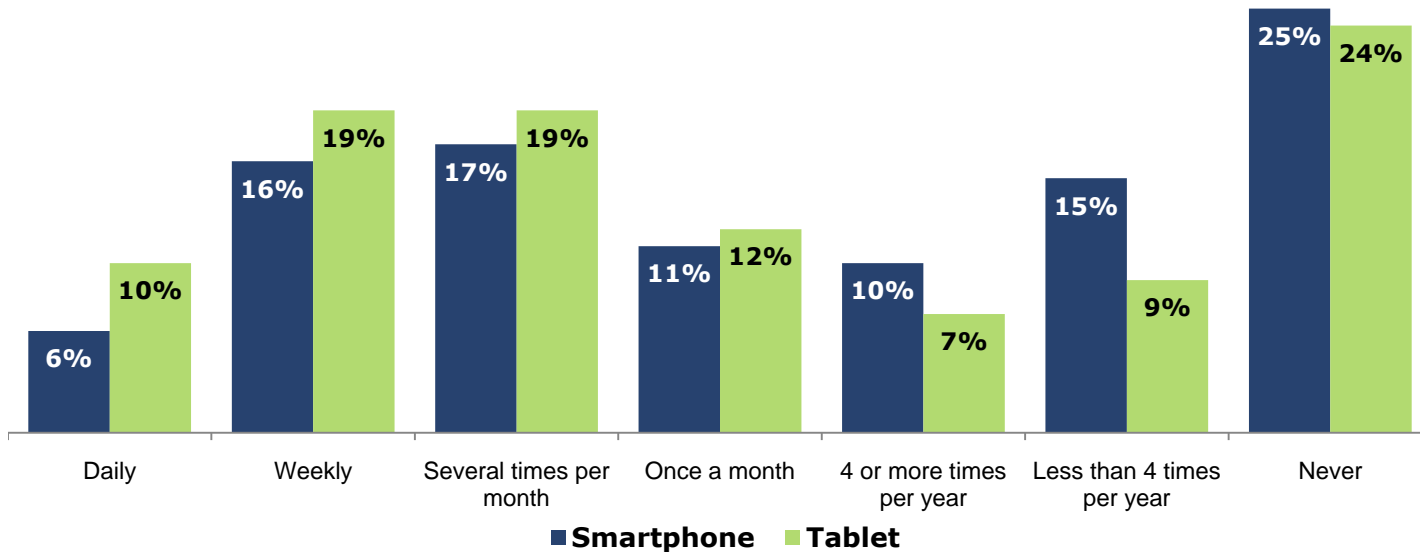
Tablets Users are Online Shoppers

Online Shopping via Mobile Device

May 2011, % of respondents

Source: etailing/Coffee Table

A study from the etailing group and Coffee Table, "The 'Shopping Mindset' of the Mobile Consumer," indicates that tablet users are more likely than smartphone users to engage in online buying and/or browsing on a daily, weekly, several times per month, and monthly basis than smartphone users.



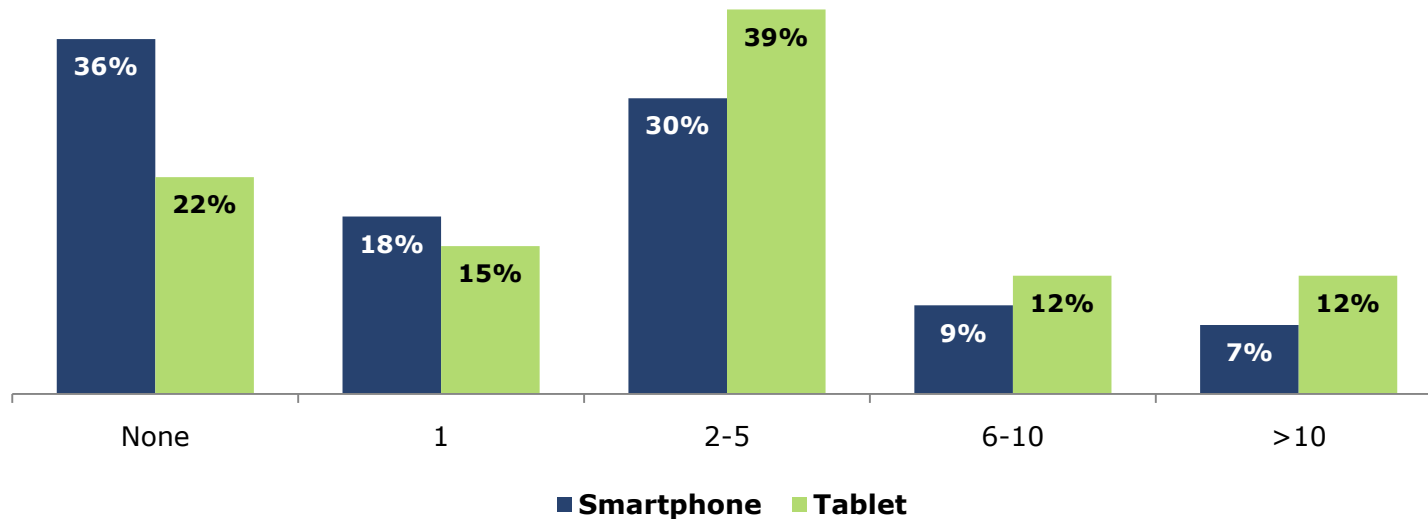
Tablet Owners Make More Purchases

Online Purchases via Mobile Device

May 2011, % of respondents making a purchase in past six months

Source: etailing/Coffee Table

Tablet users are more likely than smartphone users to say they have made three to five, six to 10, and more than 10 online purchases in the last six months. Smartphone users are slightly more likely to have made one purchase in the last six months and 64% more likely to have made no online purchases (36% compared to 22%).

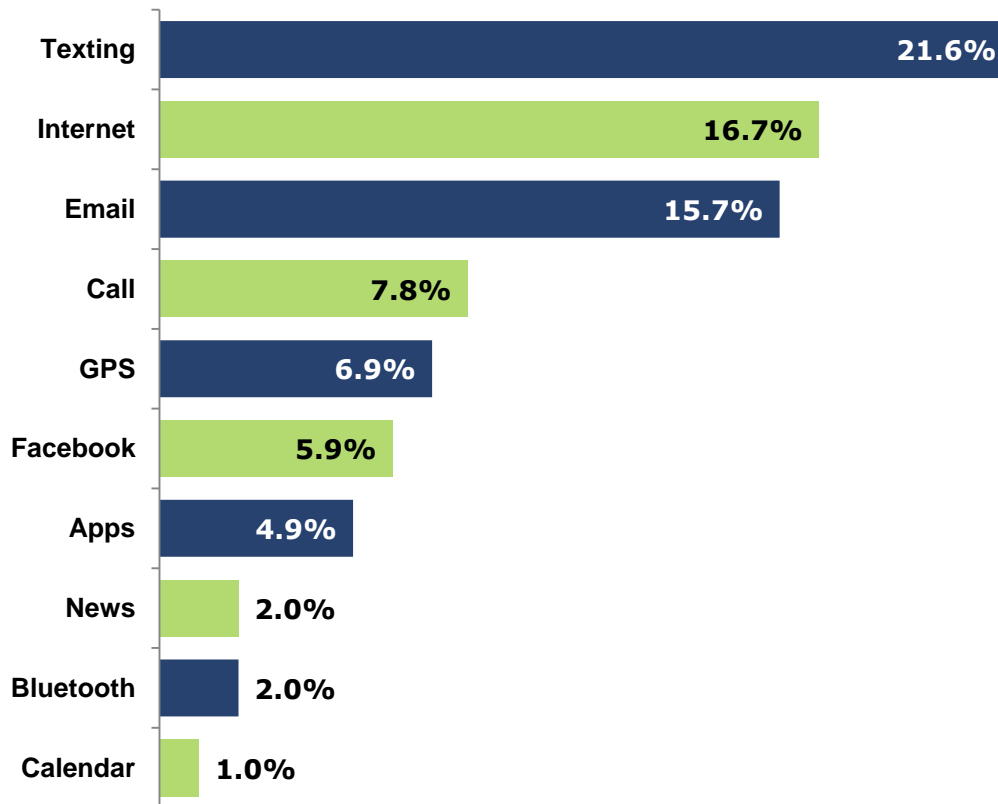


Half Make Purchases with a Smartphone

Consumer Smartphone Usage

May 2011, % of respondents

Source: Prosper Mobile Insights



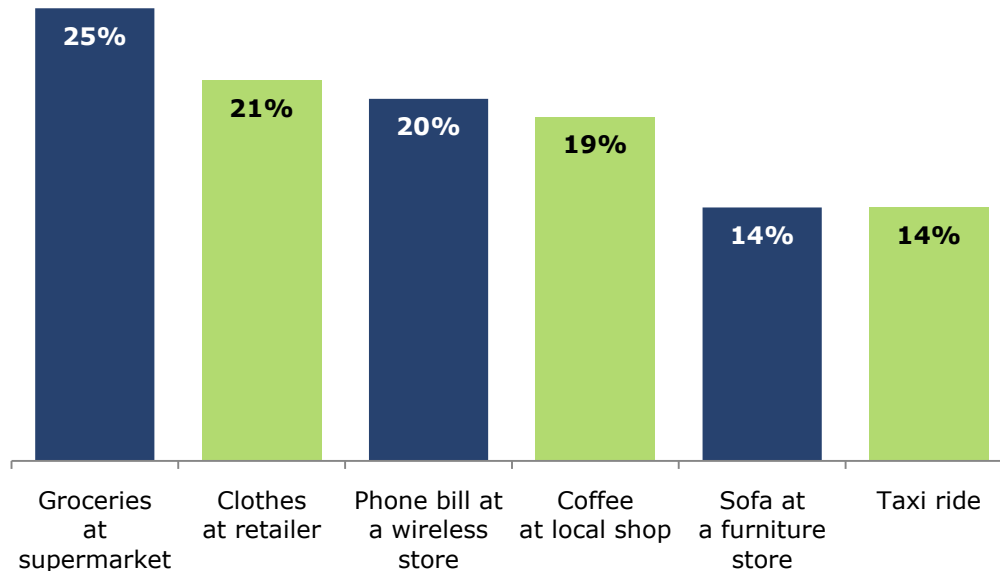
81% of smartphone users have used their smartphone to [browse or look for products or services](#) and 50% have made a purchase with their smartphone, according to research from Prosper Mobile Insights. Additional marketing-based activities are even more popular, including receiving special offers by text message (54%) or scanning a QR code, about 58%.

25% Would Pay for Groceries

Smartphone as Payment System

Q1 2011, % of respondents

Source: Compete



The adoption of NFC-equipped (near field communication) mobile phone will substitute for the use of a credit card or debit card. Twenty-five percent of consumers said they would be likely to buy groceries via mobile phone, according to [Compete data](#).

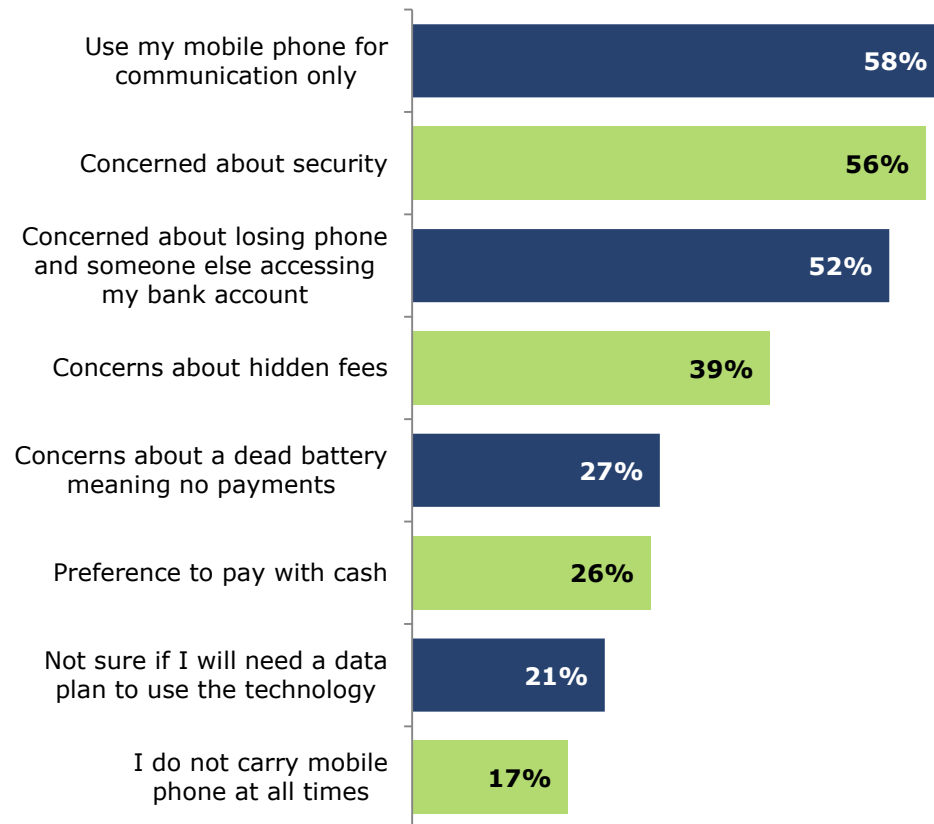
Respondents would also buy clothes (21%), pay a bill (20%) or buy a coffee (19%).

Security of Mobile-Pay a Big Concern

Smartphone as Payment System

Q1 2011, % of respondents

Source: Complete



Consumers who said they were not likely to use their phone for payments cited personal preferences and [concerns about security](#) as reasons. 58% preferred to only use their mobile phone for communication (calls, email, or text) while 56% indicated they were concerned with the security of using the phone for payments (more than one answer permitted) and 52% were concerned about security if they lost their phone.

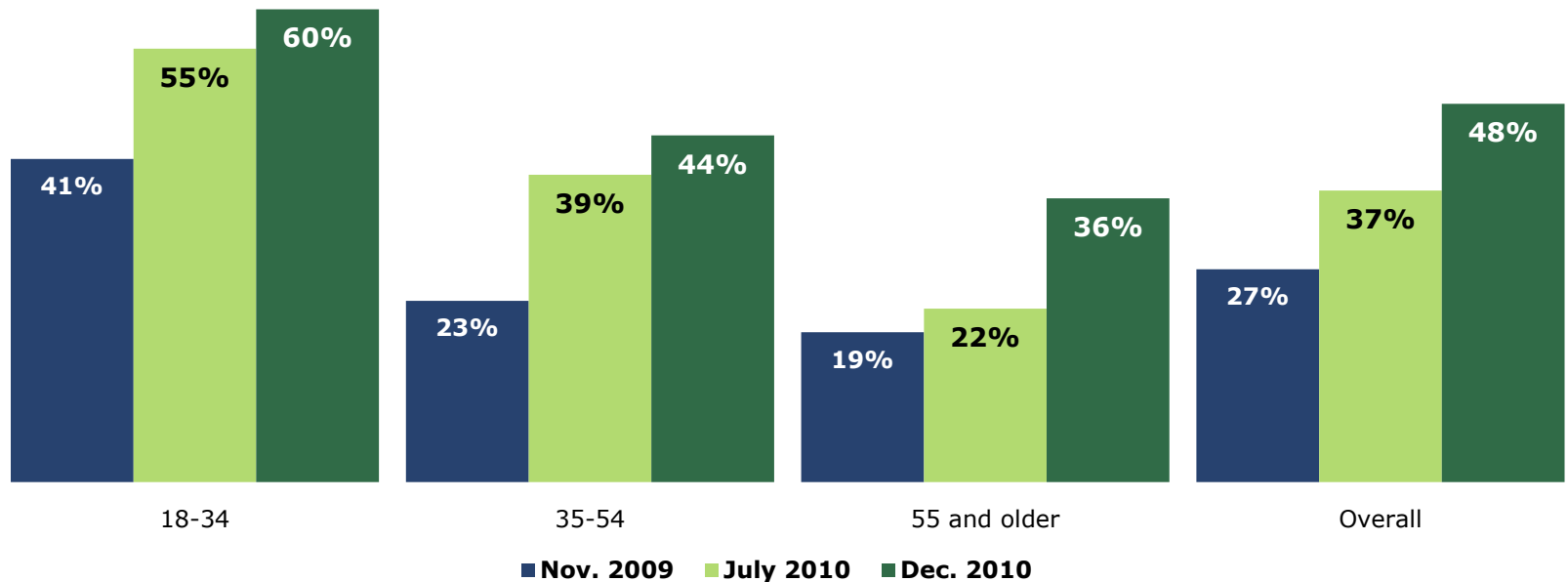
Mobile Browsing In-store Grows 78%

In-store Mobile Product Browsing

2009-2010, % of US consumers

Source: Oracle / ATG

Overall, the percentage of US consumers who use mobile devices to browse and research products while in a physical store [grew 78% from 2009 to 2010](#). 48% of consumers browsed and researched products via mobile in 2010, compared to 27% in 2009. The activity is more popular with younger consumers were more apt to browse and research in-store, although older consumers had a higher year-over-year growth rate.





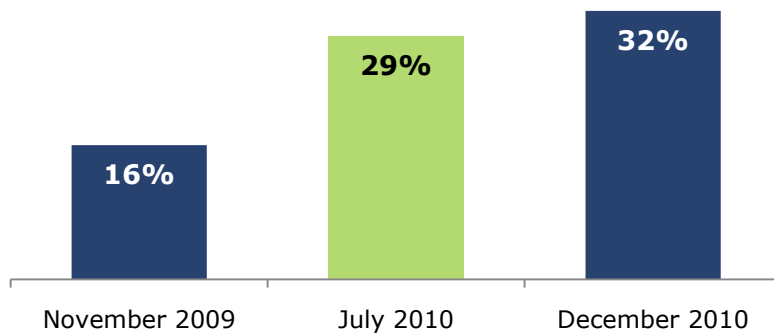
Mobile People

Men Double Mobile Purchasing Y-o-Y

Mobile Purchases by Men

2009-2010, % of men making 1 or more m-purchase

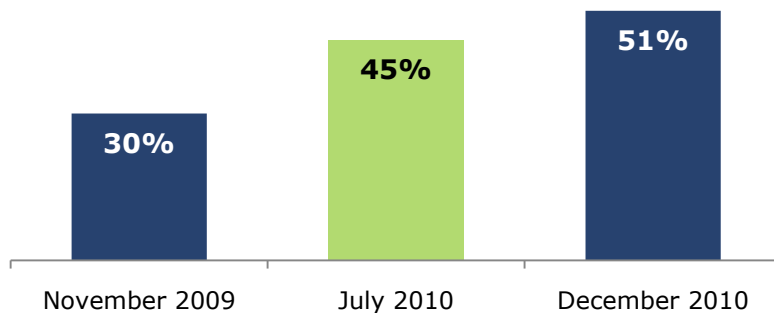
Source: Oracle / ATG



32% of men had [made a mobile purchase](#) in December 2010, double the 16% who had done so in 2009. A substantial portion of this growth had occurred by July 2010, when 29% of men had made a mobile purchase. In-store in December 2010, compared to 27% in November 2009.

Mobile Browsing by Men

Source: Oracle / ATG



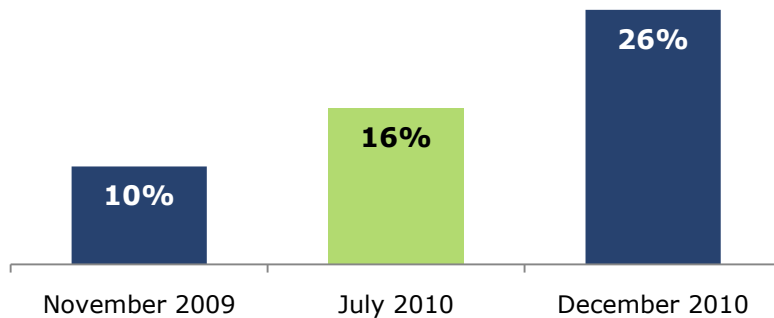
Oracle/ATG found that men actually browsed and researched products via mobile device while in-store at a rate [slightly higher \(51%\) than the overall average](#) in December 2010. In November 2009, 30% of men performed this activity, giving them a 70% growth rate about 10% below the overall average.

Fewer Women Purchase, Browse

Mobile Purchases by Women

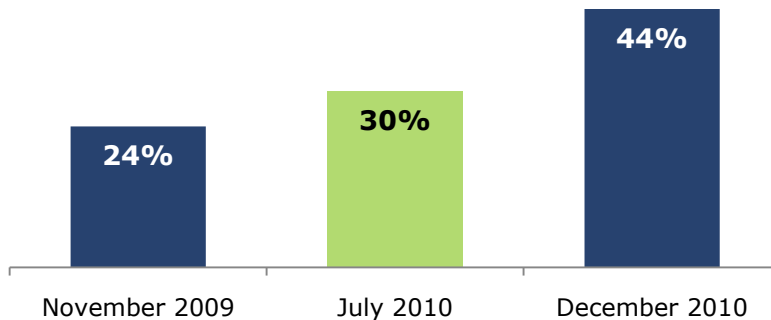
2009-2010, % of women making 1 or more m-purchase

Source: Oracle / ATG



Mobile Browsing by Women

Source: Oracle / ATG



While a smaller percentage of women than men had made a [mobile purchase](#) as of December 2010 – only 26% compared to 32% of men -- their growth rate since 2009 was higher at 160%.

The December 2010 [in-store browsing rate among women](#) (44%) was almost 10% lower than the overall average. However, women's growth rate in this activity since November 2009 was about 83%, slightly ahead of the overall growth rate.

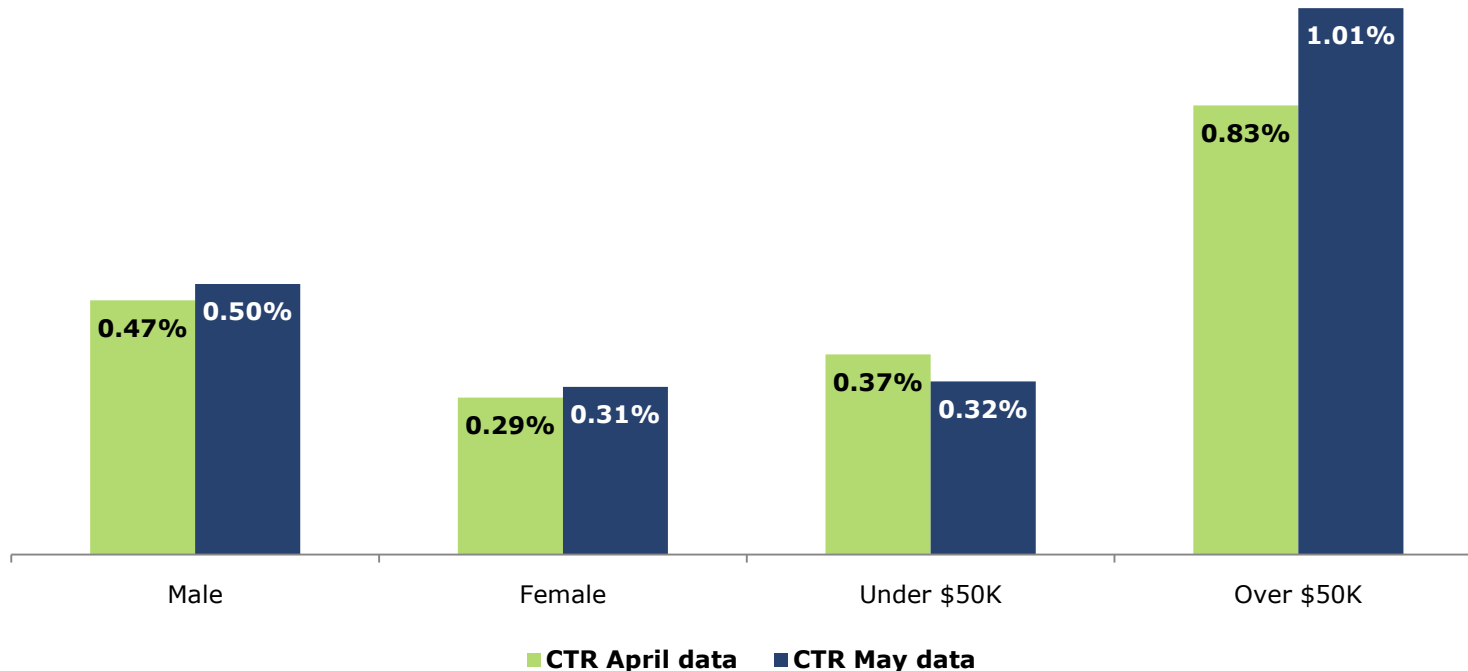
Both Genders Clicking More Ads

Mobile Ad CTR, by Gender, Income

April-May 2011, % of total users

Source: Jumptap

Data from Jumptap's STAT report suggests that while its network reaches an even split of men and women, [men are more likely to click on](#) ads. Click-through for both genders increased by about 5% since last month. Not surprisingly, household income has the most impact on mobile ad click-through rates.



Hispanics Have Higher Mobile Use

Mobile Device Use by Hispanics

April 2011, % of respondents, n=24,754

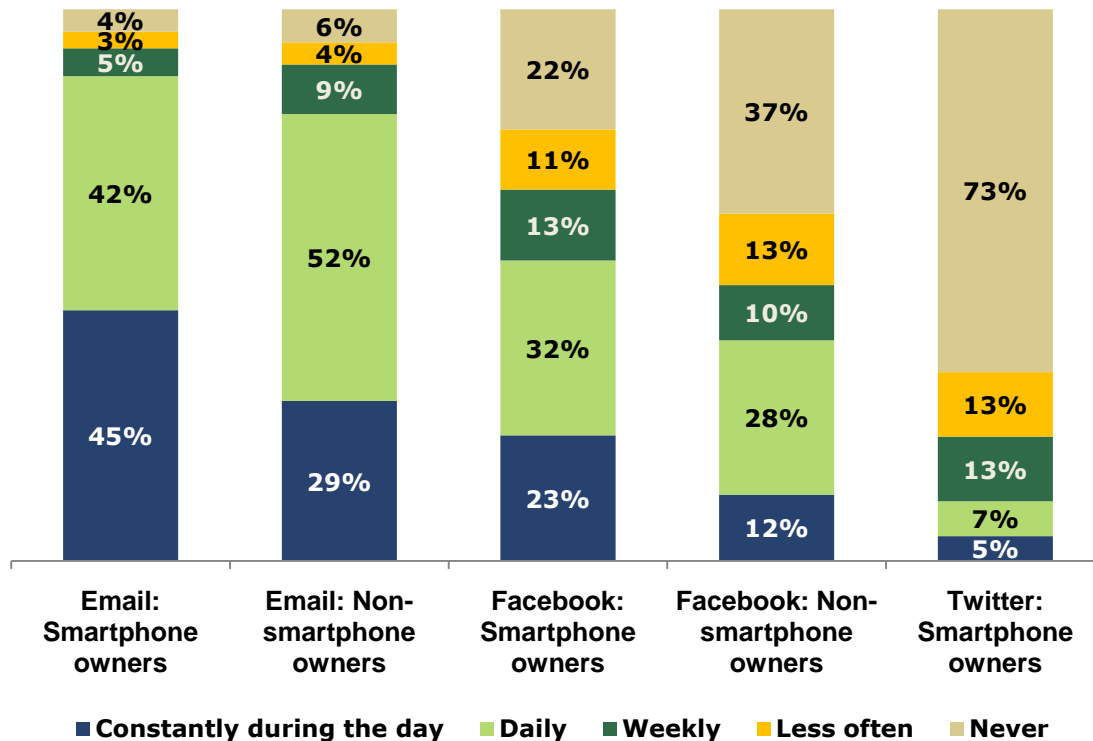
Source: BIGresearch

A report from BIGresearch

Simultaneous Media Usage ([SIMM17](#))

finds that Hispanic US adults are more likely to regularly use several new mobile devices than overall adults. For example, 18.6% of Hispanic adults use a Blackberry, 37% more than the 13.6% of overall adults who do so.

Hispanic adults are also 59% more likely than overall adults to use an iPad (7.8% compared to 4.9%). Other regular use discrepancies exist in usage rates of iPhones (Hispanics 59% more likely to regularly use) and Droids (Hispanics 64% more likely to use).

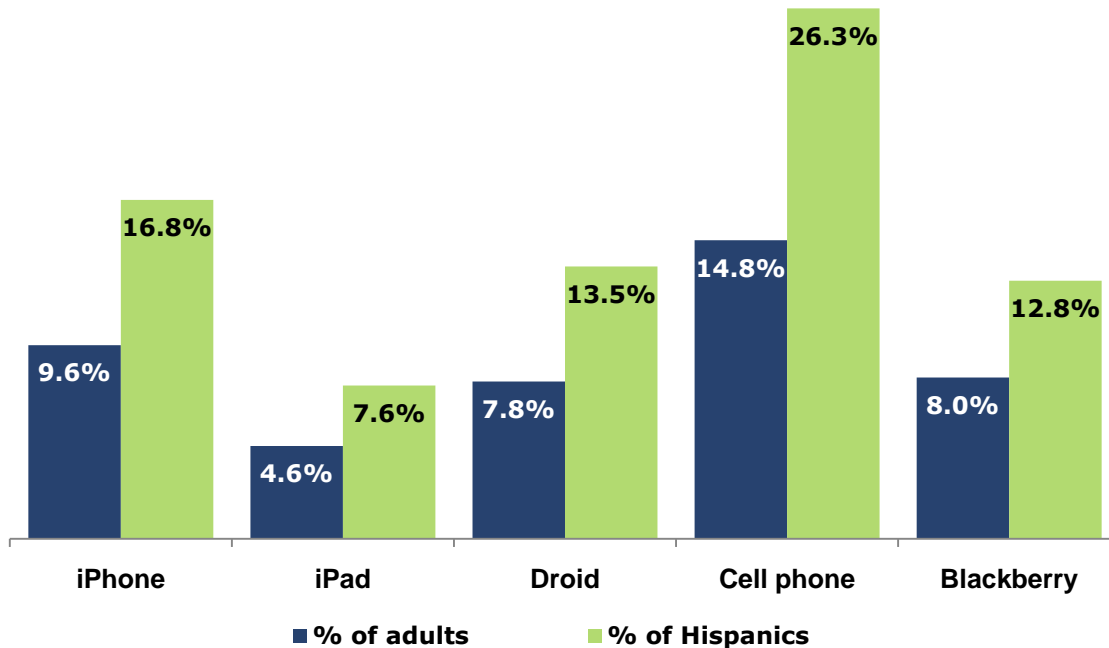


Hispanics Search More via Mobile

Mobile Device Use for Internet Search

April 2011, % of respondents, n=24,754

Source: BIGresearch



About one-quarter (26.3%) of Hispanic adults regularly search the [internet via cell phone](#), 78% more than the 14.8% of overall adults.

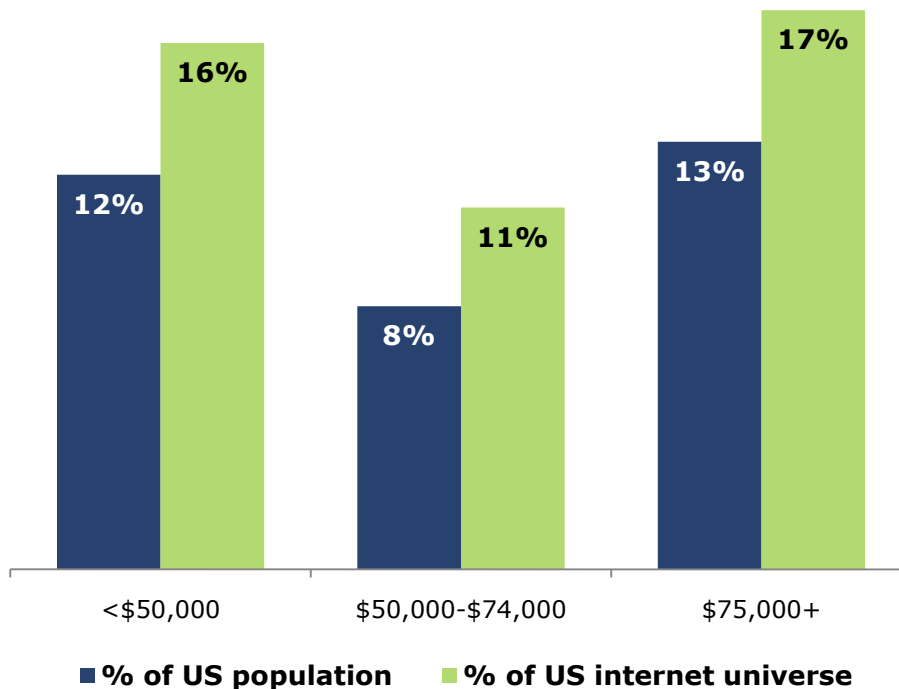
In addition, a 73% difference exists in regular use of Droid for internet search. And while only 7.6% of Hispanic adults regularly use an iPad for internet search, that figure is still 65% higher than the 4.6% of overall adults. Large discrepancies also exist in rates of using iPhone and Blackberry devices for internet search.

Growing Up Digital, Kids Impact Usage

Internet Use by Household Income

April 2011, % of households

Source: The Nielsen Company



High income US households represent a larger percentage of the overall US internet universe, [according to](#) “The New Digital American Family” from Nielsen. Households earning \$75,000 or more in annual income represent 17% of the internet universe, a figure 30% larger than the 13% of total US population they represent.

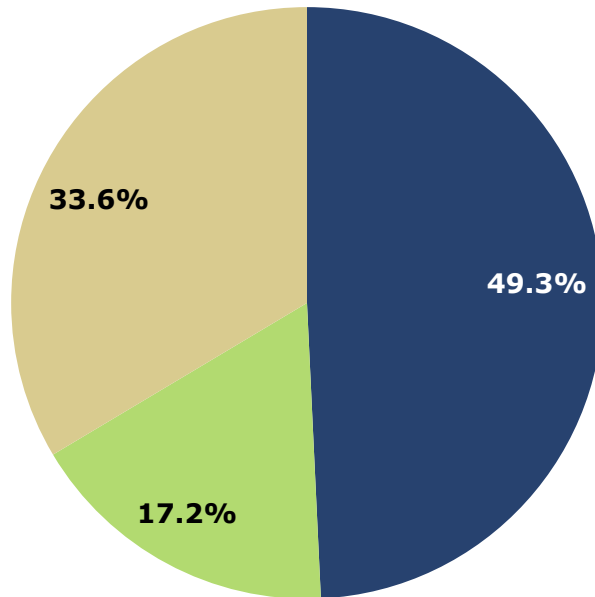
Interestingly, middle class households with children younger than 18 earning \$50,000 to \$74,999 also use [more internet](#). They constitute 11% of the internet universe, a 37.5% larger figure than the 8% of the total US population they represent. Households with children younger than 18 earning less than \$50,000 annually use the internet at a 33% higher rate than their share of US population (16% compared to 12%).

Families, Young Adults Equal Boomers

Current Family Marketplace

April 2011, % of households

Source: The Nielsen Company



- Baby Boomer & older, no kids
- Generation X & younger, no kids
- Households with kids

Overall, Nielsen finds that [one-third of households](#) have children.

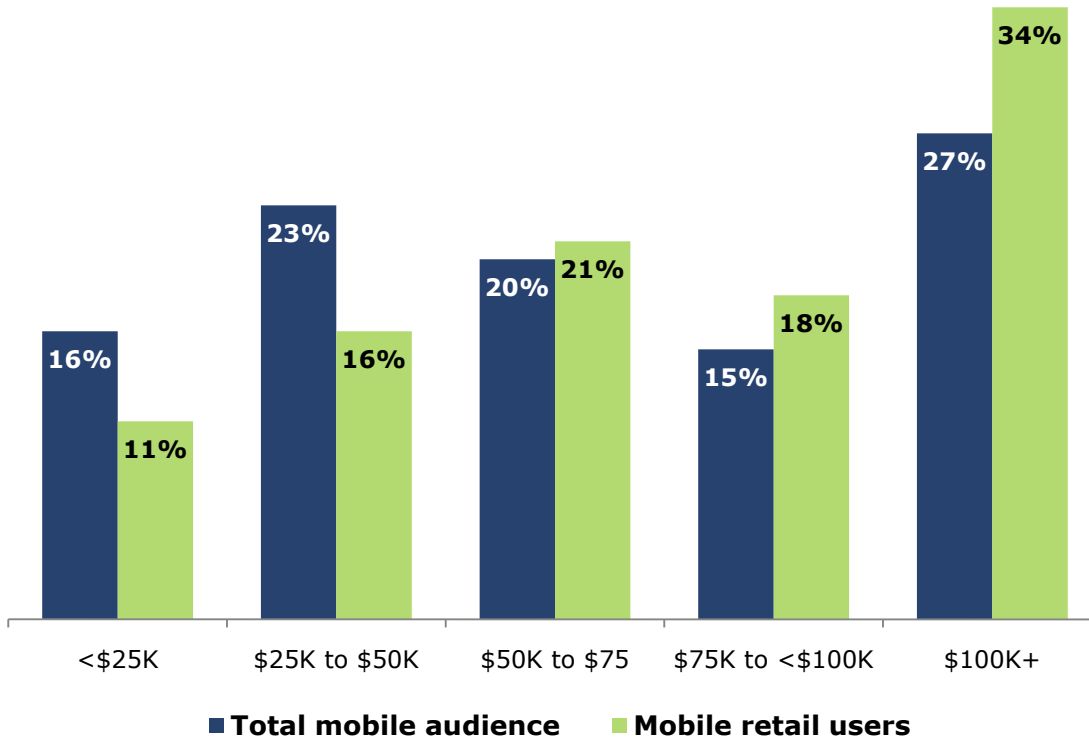
And while the largest single share of the US family marketplace is comprised of Baby Boomers and older generations (born in 1964 or earlier) without children -- who represent 49% of all households -- the “wired with children” set and the young adults who have not yet (presumably) settled down, make up a slightly bigger share of the US marketplace.

Mobile Shoppers are Young, Wealthy

Mobile Retail Users, by Income

2010 Study, % of audience

Source: Millennial Media, comScore



In terms of mobile impact and adoption of what's new, mobile retail users skew younger and wealthier than the general mobile audience, [according to](#) data from "Mobile Intel Series: Retail" from Millennial Media and comScore.

34% of mobile retail users earn \$100,000 or more annually, and 18% of mobile users earn \$75,000 to \$99,000.

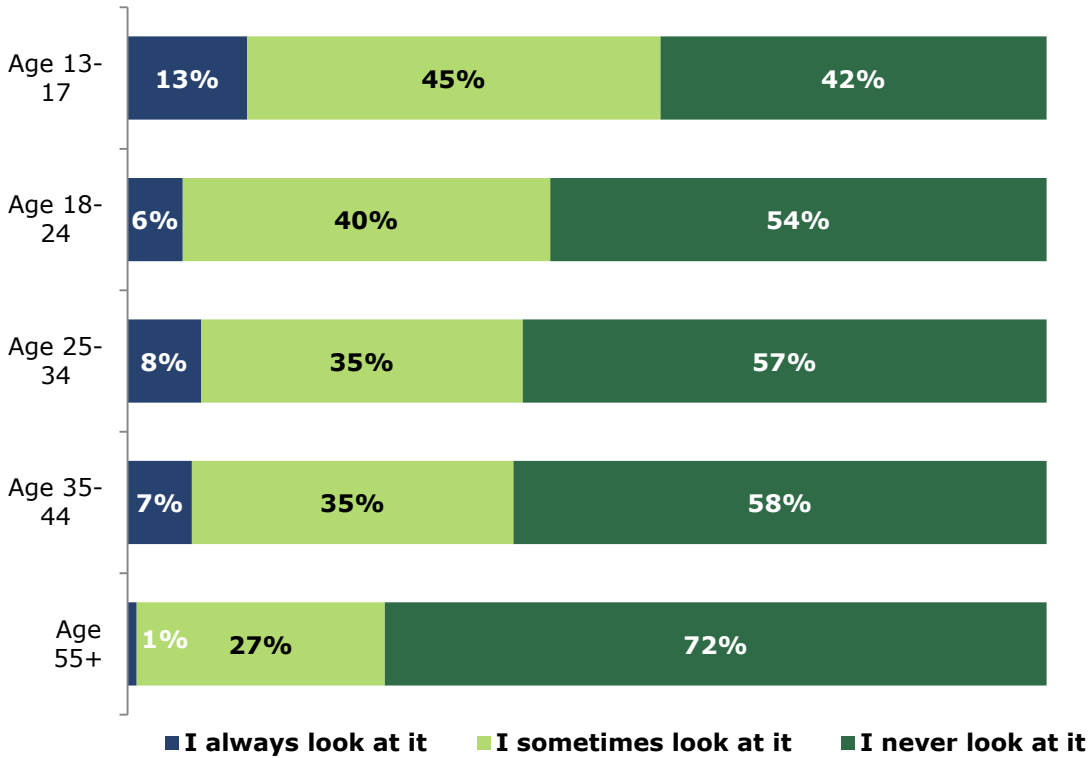
About the same percentage of mobile retail users (21%) as overall mobile users (20%) earns \$50,000 to \$74,000. Below this income bracket, overall mobile users have a larger share.

Young React More Frequently to Ads

Reaction to Mobile Advertising, by Age

Q1 2011, % of audience

Source: The Nielsen Company



Mobile advertising is increasingly finding its way into mobile apps, and currently teenagers are much more receptive than their elders. 58% of teens say they “always” or sometimes” look at mobile ads, [according](#) to Nielsen’s “State of the Media: Trends in Advertising Spend and Effectiveness, Q1 2011.”

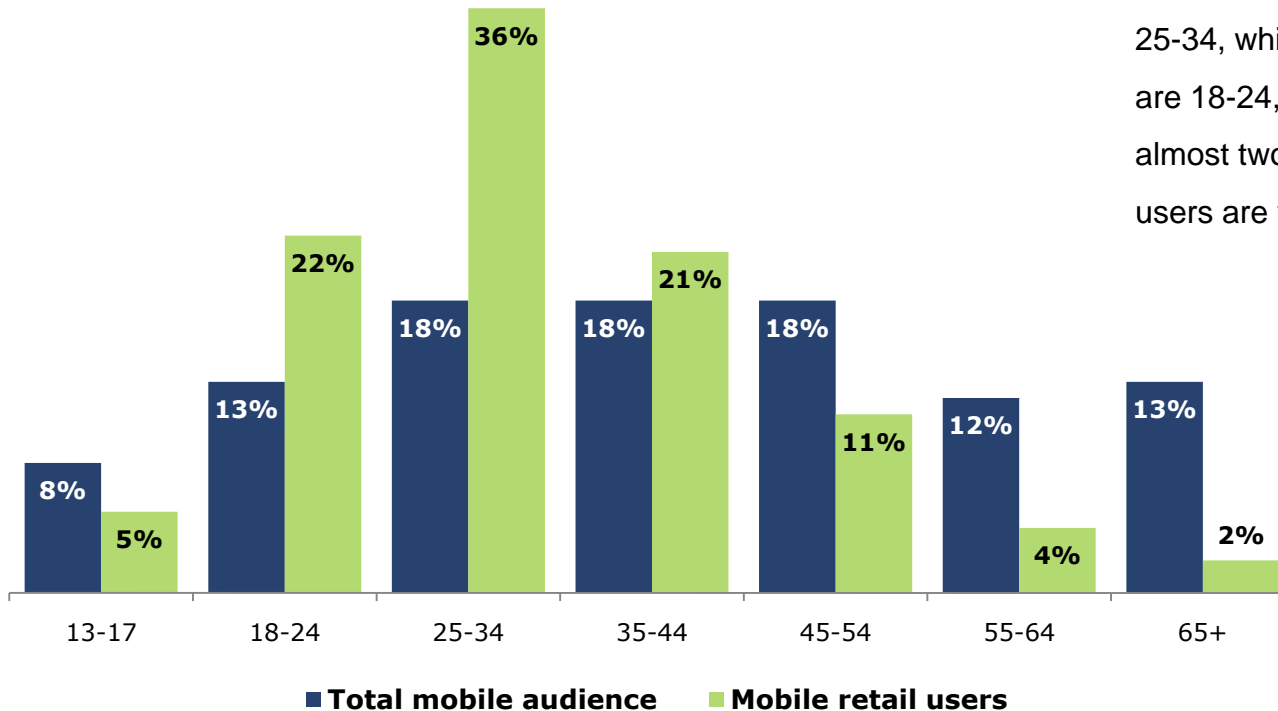
61% of m-Retail Shoppers are under 35

Mobile Retail Users, by Age

2010 Study, % of audience

Source: Millennial Media, comScore

The highest percentage of mobile retail users, 36%, are between the ages of 25-34, while 22% of mobile retail users are 18-24, and 5% are 13-17. In total, almost two-thirds (63%) of mobile retail users are younger than 35.



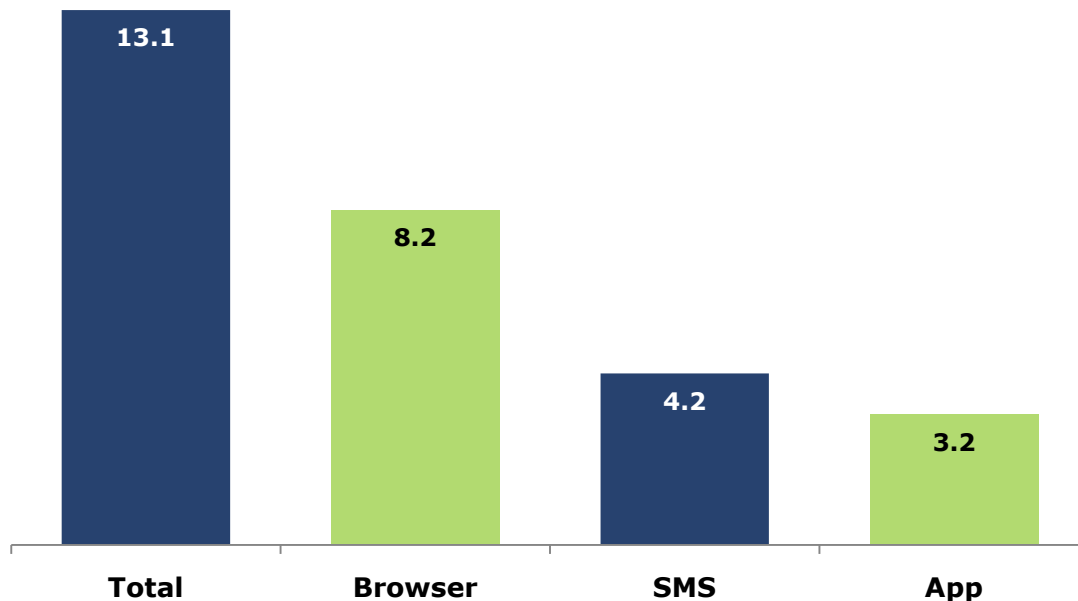
13.1 Million Mobile Consumers

Mobile Retail Users, by Access Method

2010 Study, Audience in millions

Source: Millennial Media, comScore

In total, [13.1 million consumers](#) perform mobile retail. Of those, almost 63% (8.2 million) use their mobile browser. Another 32% (4.2 million) use SMS text messaging, while 24% (3.2 million) use an app. About 42% use mobile devices for research. Actual purchasing via mobile devices is performed by 38% of mobile consumers, while 29% do comparison shopping.



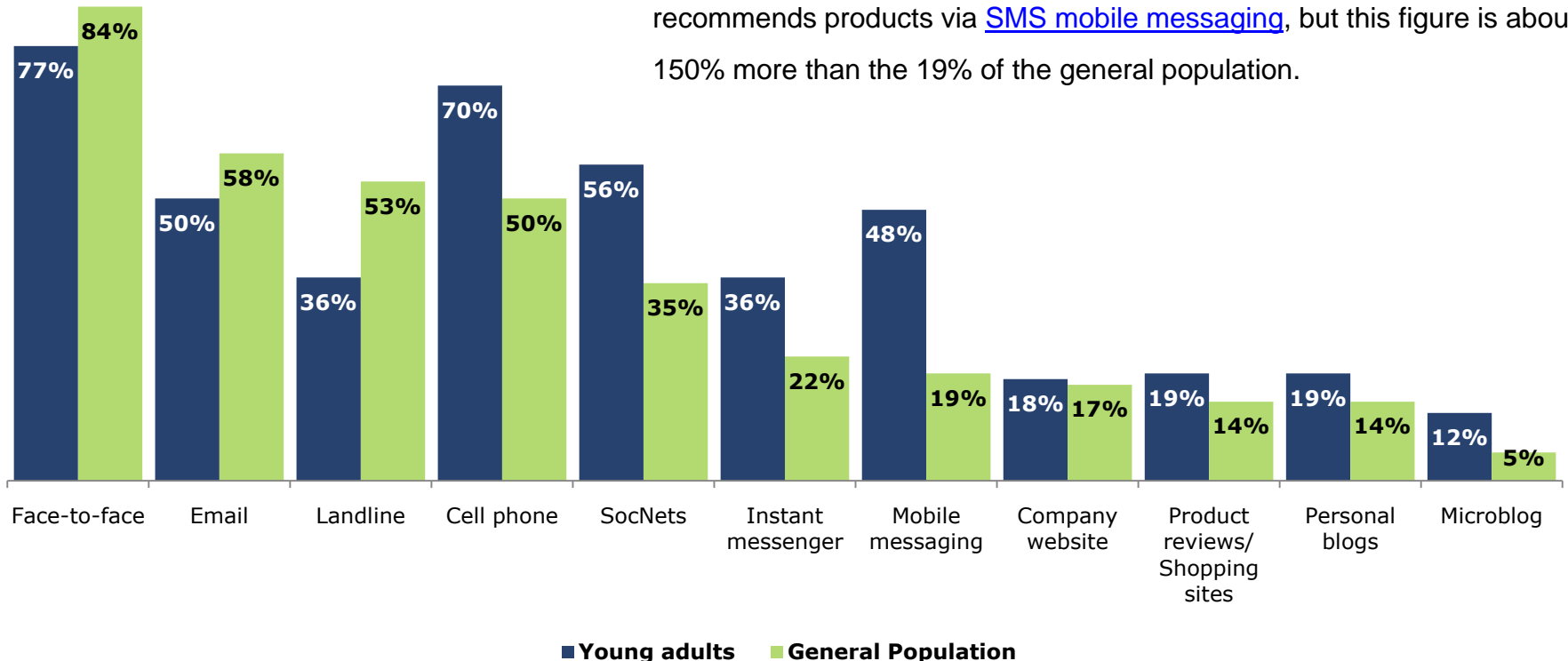
Younger Shoppers Recommend via SMS

Method of Product Recommendation

2011 Study, % of respondents

Source: Colloquy

The Colloquy 2011 [“Word of Mouth”](#) study found that how shoppers communicate is impacted by mobile devices. 58% of young adults recommend products via social networking communities while 35% of the general population do so. A lower percentage of young adults (48%) recommends products via [SMS mobile messaging](#), but this figure is about 150% more than the 19% of the general population.





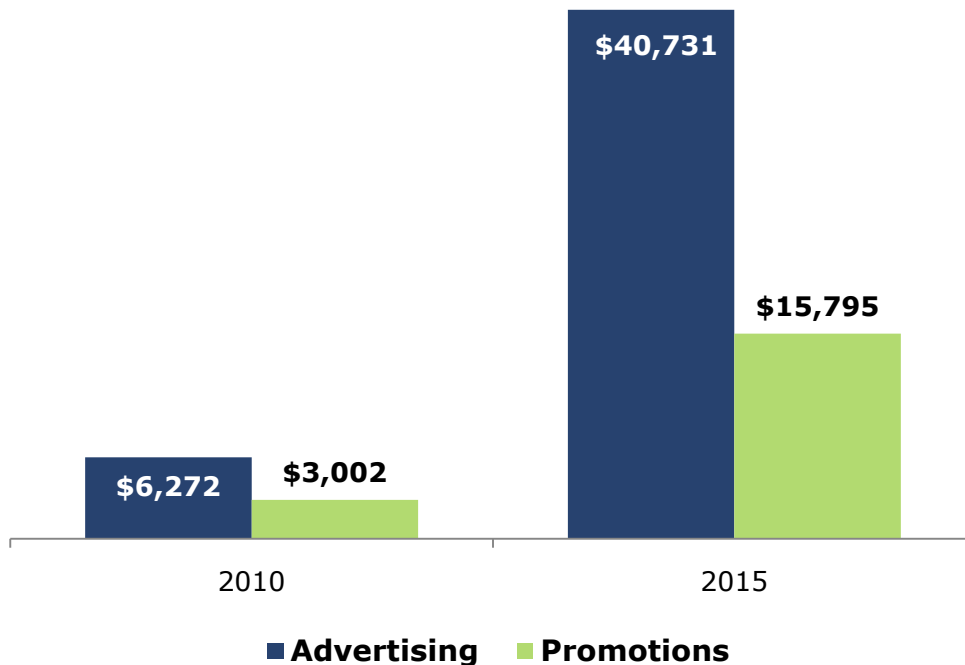
Mobile Marketing

Marketing Spend to Reach \$56.5 Billion

U.S. Mobile Marketing Spend

2010 v. 2015, US\$ millions

Source: Mobitrove



The total amount of money spent by US marketers on mobile advertising and promotions will reach about \$56.5 billion by 2015, according to Mobitrove. That expected figure is [more than six times](#) the almost \$9.3 billion spent on mobile advertising and promotions in 2010.

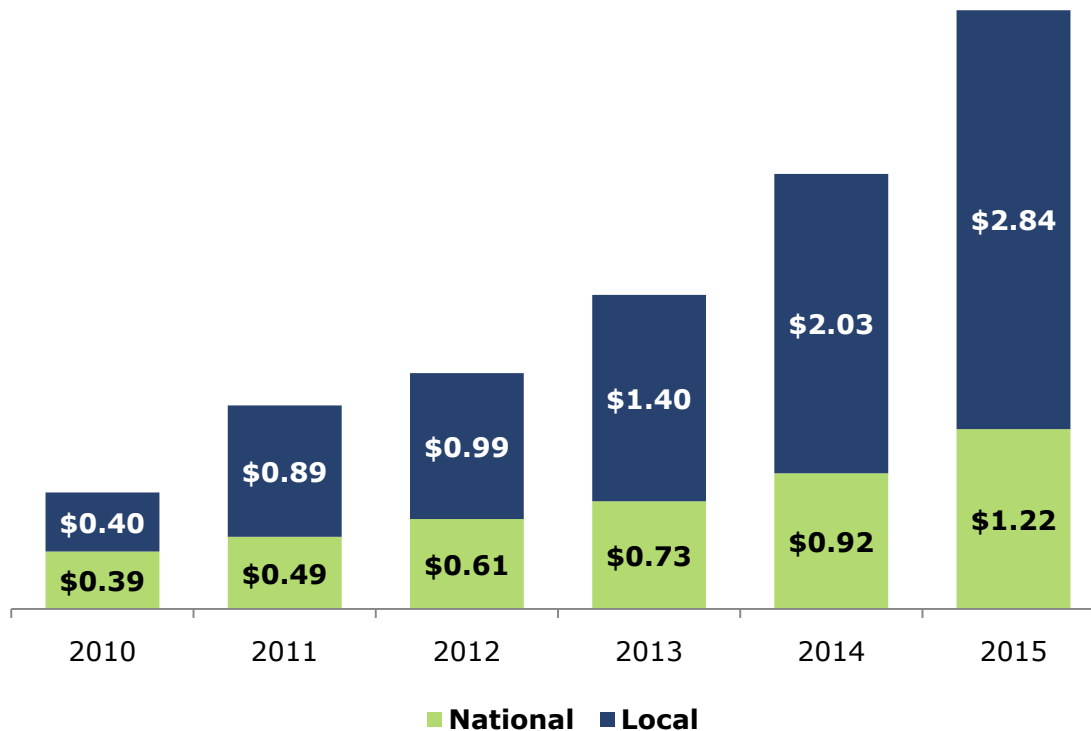
By 2015, Mobitrove forecasts total US mobile marketing spend will be tilted even more in favor of advertising. Projections indicate mobile advertising spend will reach close to \$41 billion, while mobile promotions spend will only total about 15.8 billion. This means marketers will spend about 2.5 times as much on mobile advertising in 2015.

Local Mobile Ads: 51% Share by 2015

Local vs. National Ad Spend in Mobile

2010-2015, US\$ billions

Source: BIA/Kelsey



In a more conservative forecast, BIA/Kelsey says that total US mobile ad spending will grow from \$790 million in 2010 to \$4 billion in 2015. The local portion of that total is projected to increase from \$404 million to \$2.8 billion.

Among the drivers of mobile ad revenue growth are smartphone penetration, mobile web usage and related increases in ad inventory.

1,342% Growth in Retail, Restaurants

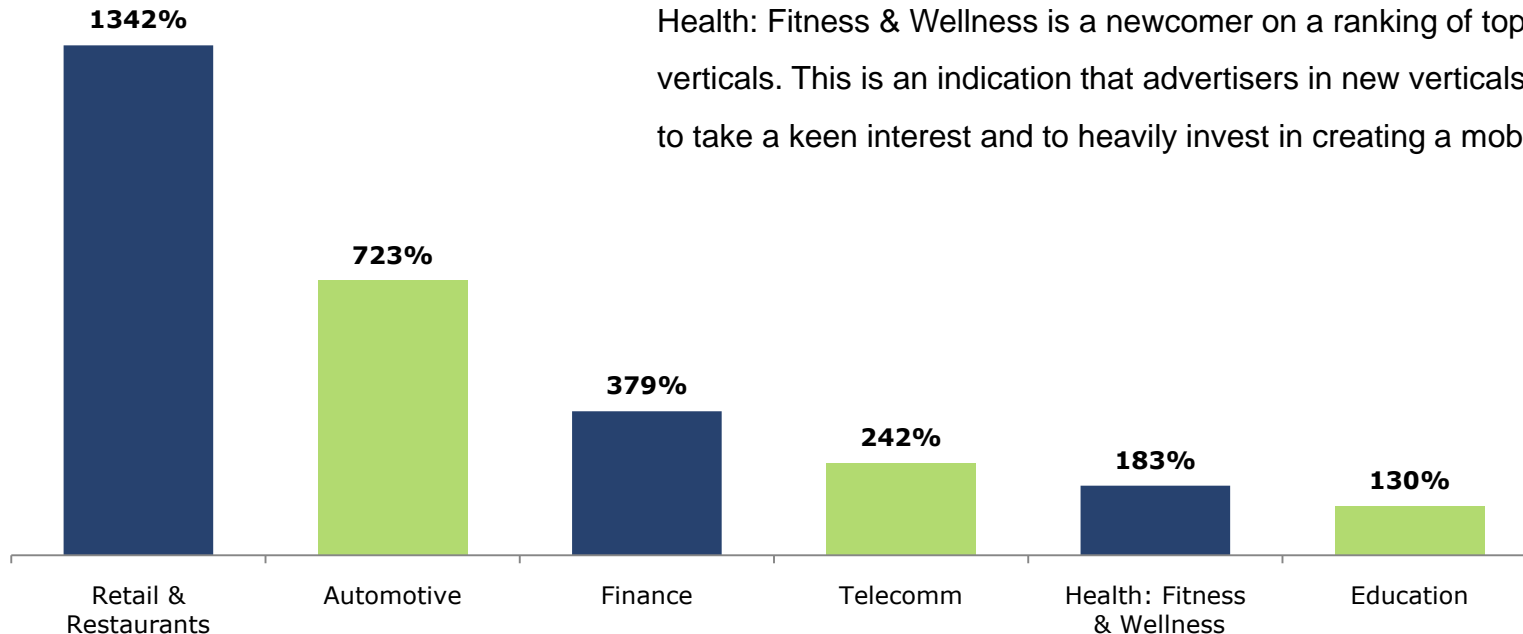
Verticals Growth in Mobile Campaigns

Q1 2010 v. Q1 2011, % growth

Source: Millennial Media

Six verticals experienced [triple-digit growth](#) – or greater – year-over-year according to Millennial Media's Q1 2011 report released in June.

Health: Fitness & Wellness is a newcomer on a ranking of top advertising verticals. This is an indication that advertisers in new verticals are starting to take a keen interest and to heavily invest in creating a mobile presence.

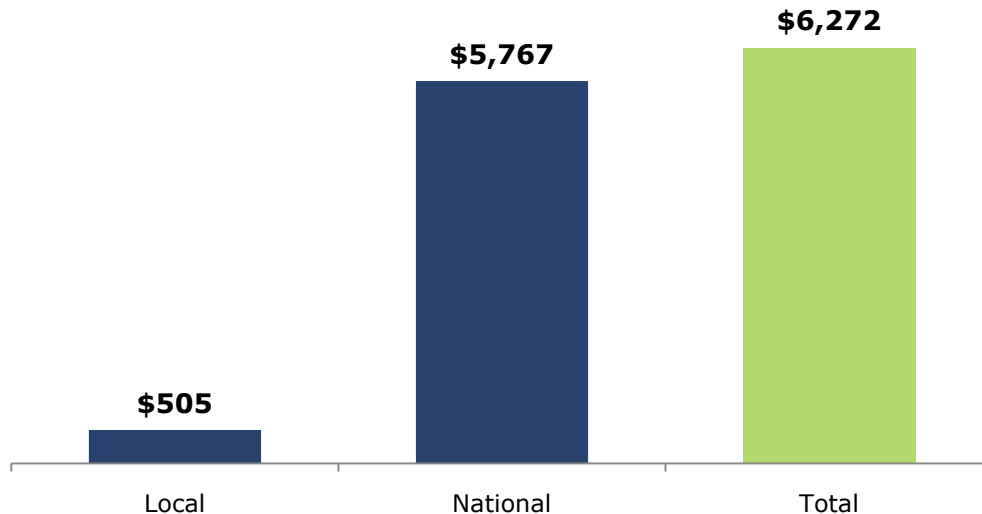


92% of Ad Spend at National Level

U.S. Mobile Marketing: Advertising

2010 Totals, US\$ millions

Source: Mobitrove



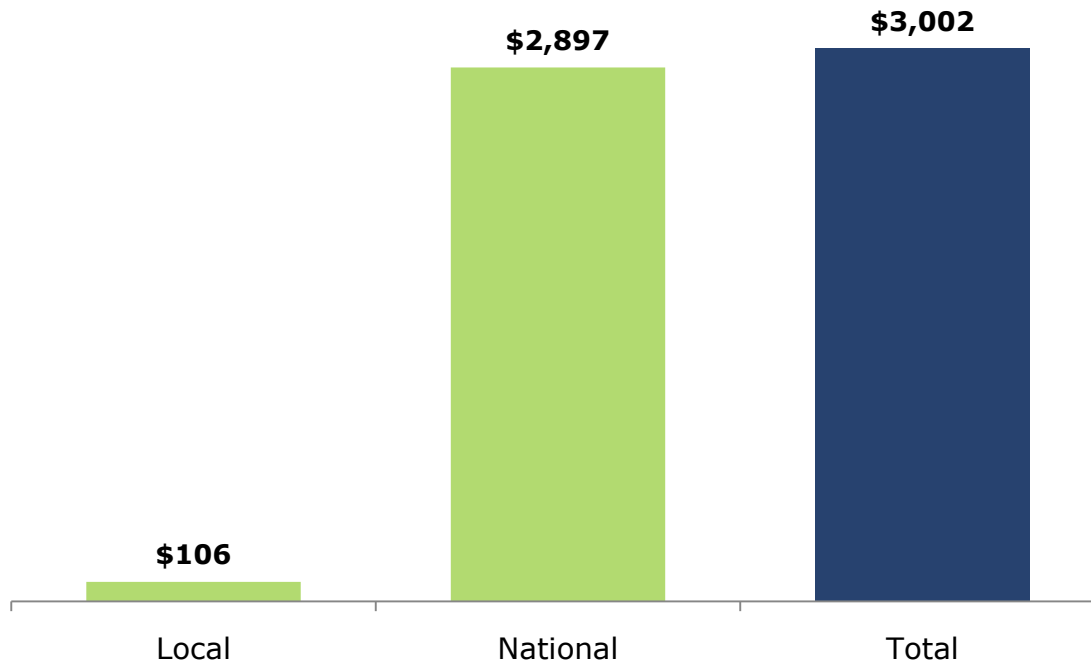
Looking at total US mobile advertising spend in 2010, it becomes clear that last year, marketers focused the vast majority of their dollars on national campaigns. Out of roughly \$6.3 billion spent in total, about \$5.8 billion was allocated toward national advertising and only about \$500 million on local advertising. This means roughly 92% of all mobile advertising dollars were spent at a national level.

\$100M for Local Mobile Promotions

U.S. Mobile Marketing: Promotions

2010 Totals, US\$ millions

Source: Mobitrove



Total US mobile promotional spend in 2010 shows an even more pronounced focus on national, rather than local, campaigns. Almost \$2.9 billion of \$3 billion was spent on national promotions. This means about [97% of mobile promotional dollars](#) spent in 2010 went toward national campaigns.

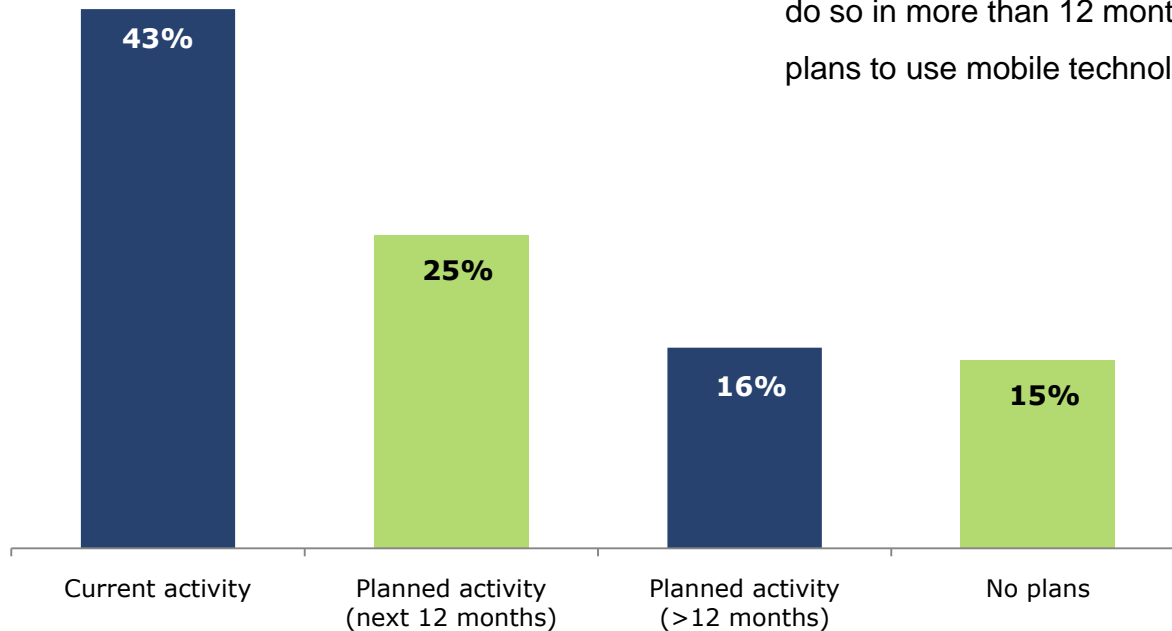
43% of Marketers Using Mobile Channel

Mobile Marketing Adoption

May 2011, % of respondents

Source: Unica

43% of marketers currently use mobile technology, [according to](#) a study from Unica, “The State of Marketing 2011.” Another 25% plan to do so within the next 12 months, and 16% plan to do so in more than 12 months. Only 15% of marketers have no plans to use mobile technology.

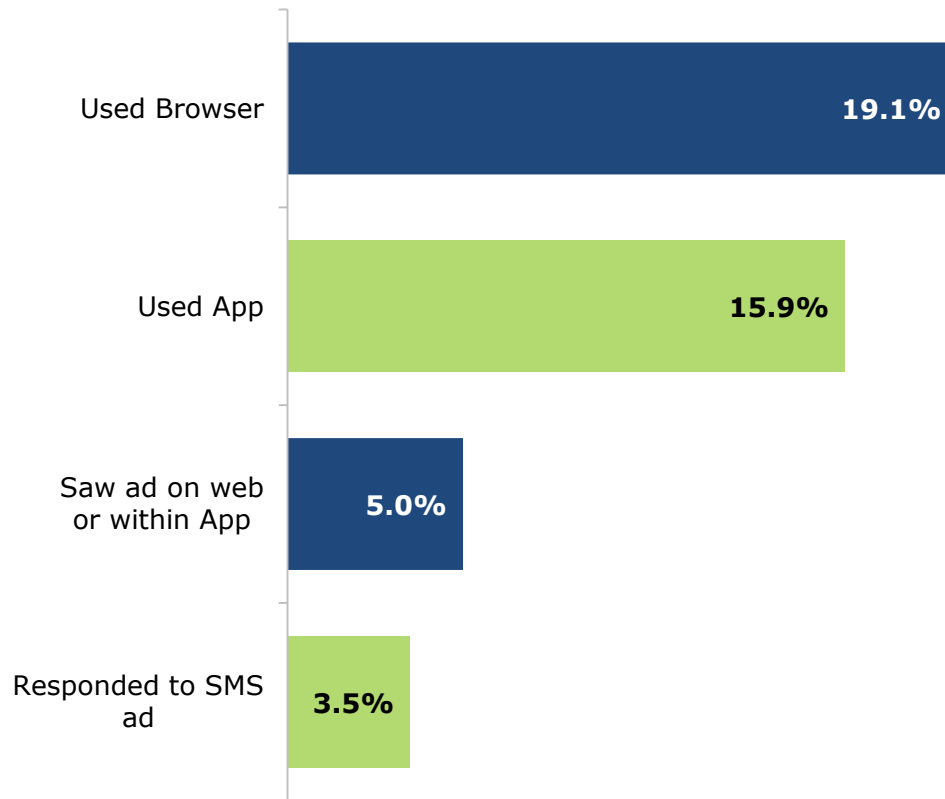


128% Growth in Campaigns over 2 Years

Category Share in Mobile Display Ads

3-month average share ending March 2011, US mobile subscribers

Source: comScore



Research from comScore estimates that [689 advertisers used mobile display advertising](#) campaigns to reach consumers, up 128% from two years prior.

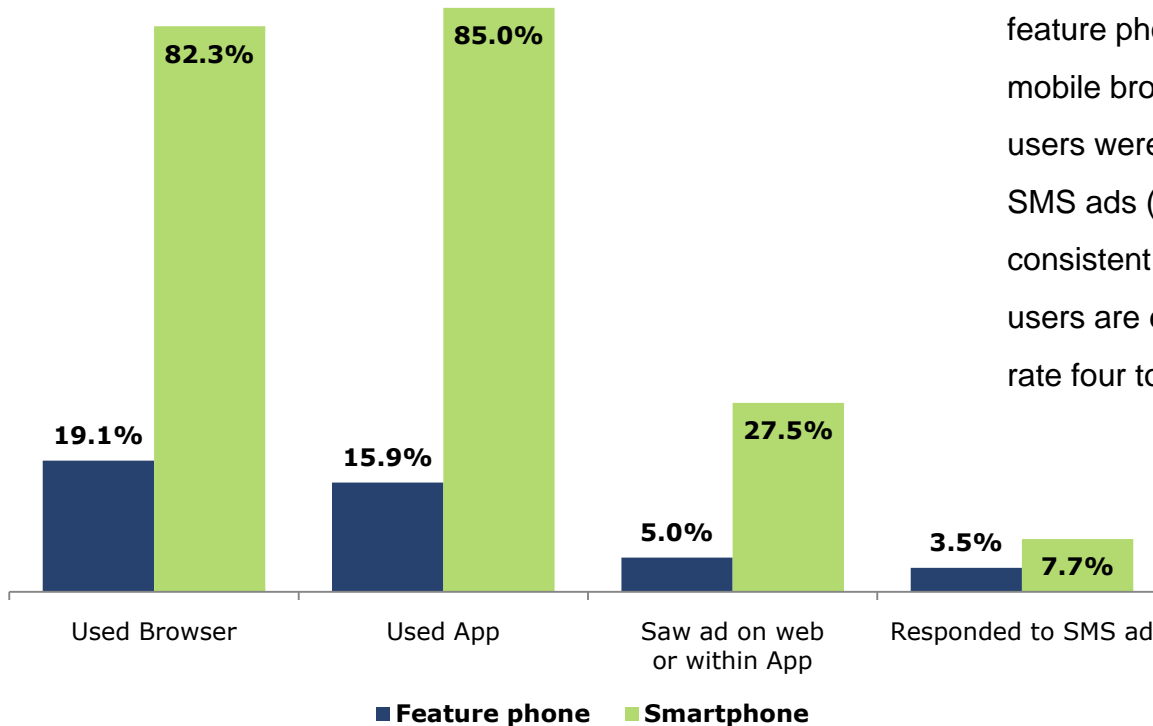
Mobile content and publishing contributed to half of all products advertised on mobile device. 26% of mobile display advertisements were for consumer discretionary goods, IT accounted for 7%, and financial services accounted for 6% of mobile display ads.

Smartphone Owners See 5x More Ads

Smartphone, Feature Phone Service Penetration

3-month average share ending March 2011, US mobile subscribers

Source: comScore



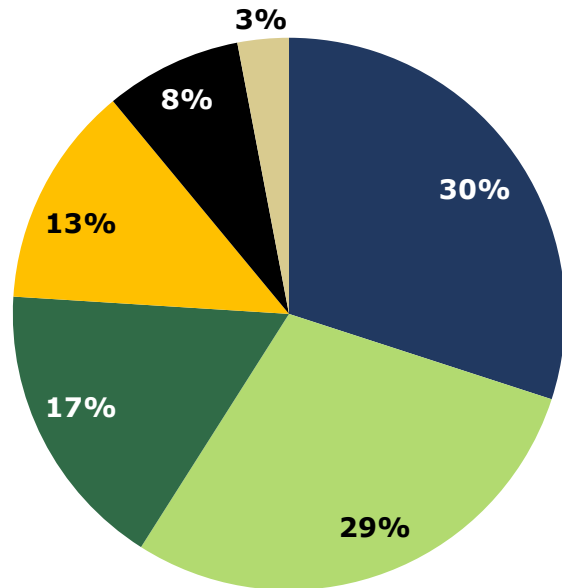
Smartphone users were also far more likely [to see web or in app ads](#) (27.5% compared to 5% of feature phone users) due to their heavier usage of mobile browsers and applications. Smartphone users were also about twice as likely to respond to SMS ads (7.7% compared to 3.5%). This is consistent with the data showing that smartphone users are employing their browsers and apps at a rate four to five times that of feature phone users.

30% of Campaigns Focused on Leads

Mobile Advertiser Campaign Goals

April 2011, % of campaigns

Source: Millennial Media



- Lead Gen/Registrations
- Sustained in-market presence
- Product launch/release
- Brand awareness
- Increased foot traffic
- Site Traffic

With the growing sophistication of handsets, mobile advertisers are already creating a more sophisticated goal set for mobile campaigns. 30% of the mobile ad campaigns were run in order to generate leads, followed by sustained in-market presence as the advertiser goal of 29% of mobile advertisers.

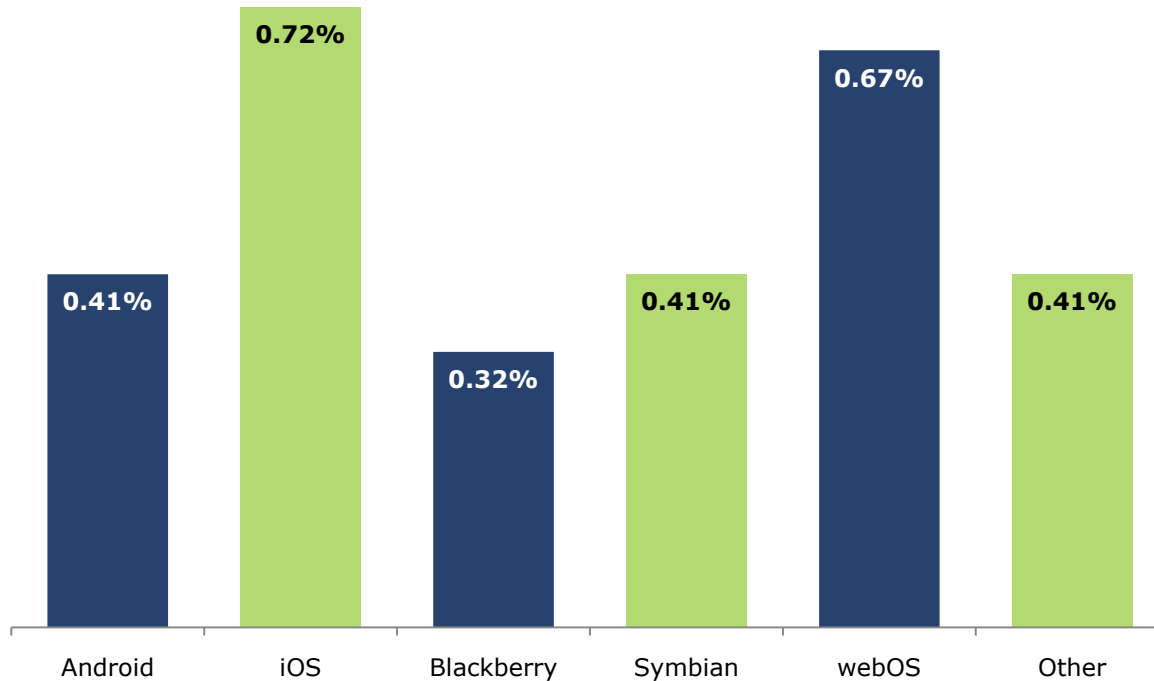
Advertisers in another 17% of the campaigns had a goal of launching or releasing a product, and 13% of the campaigns had an advertiser goal of brand awareness, according to Millennial Media's [April 2011 SMART Report](#).

Apple iOS Has Double CTR of Android

Click-Through Rates by Mobile OS

May 2011, % of users

Source: Jumptap



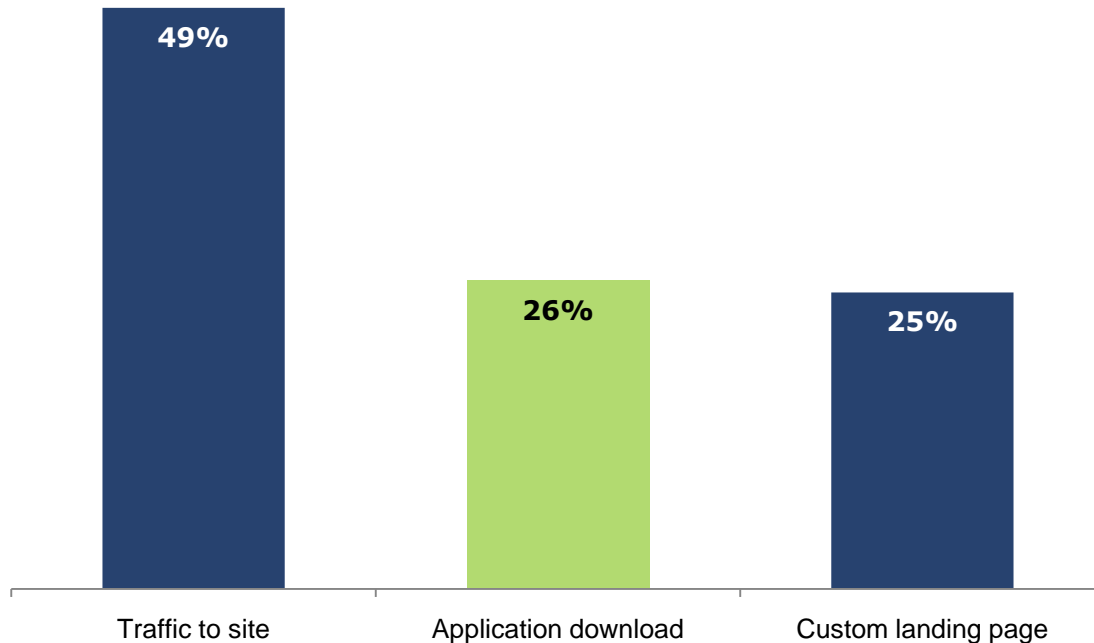
Apple's iOS sees the highest click-through-rate with the ads run on iOS devices have almost double the CTR (.72%) of those on Android devices (.41%), according to the [Jumptap STAT](#). This is despite the fact that Android is leading in overall market share.

26% Drive to App Downloads

Mobile Advertiser Campaign Destination Goals

April 2011, % of campaigns

Source: Millennial Media



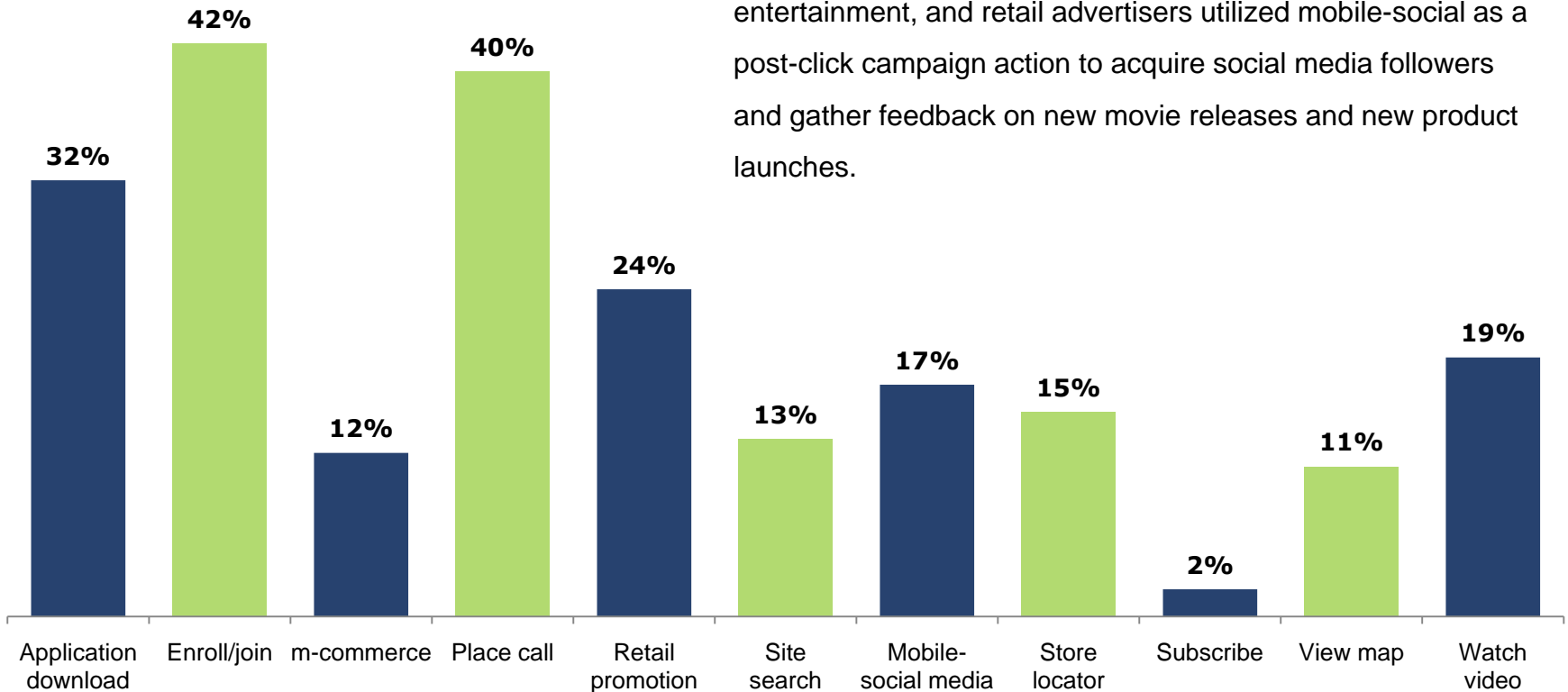
Almost [half of mobile campaigns](#) on the Millennial network were driving traffic to a website, while 26% sent users to the an app download page. The last quarter were aiming to send traffic to a custom landing page.

Mobile-Social Action Mix Up 39% M-o-M

Post-Click Action Campaign Mix

April 2011, % of campaigns

Source: Millennial Media



Mobile-social media experienced growth of 39% month-over-month, [reported](#) Millennial Media, with a 17% share of the post-click campaign action mix in April. Telecom, entertainment, and retail advertisers utilized mobile-social as a post-click campaign action to acquire social media followers and gather feedback on new movie releases and new product launches.

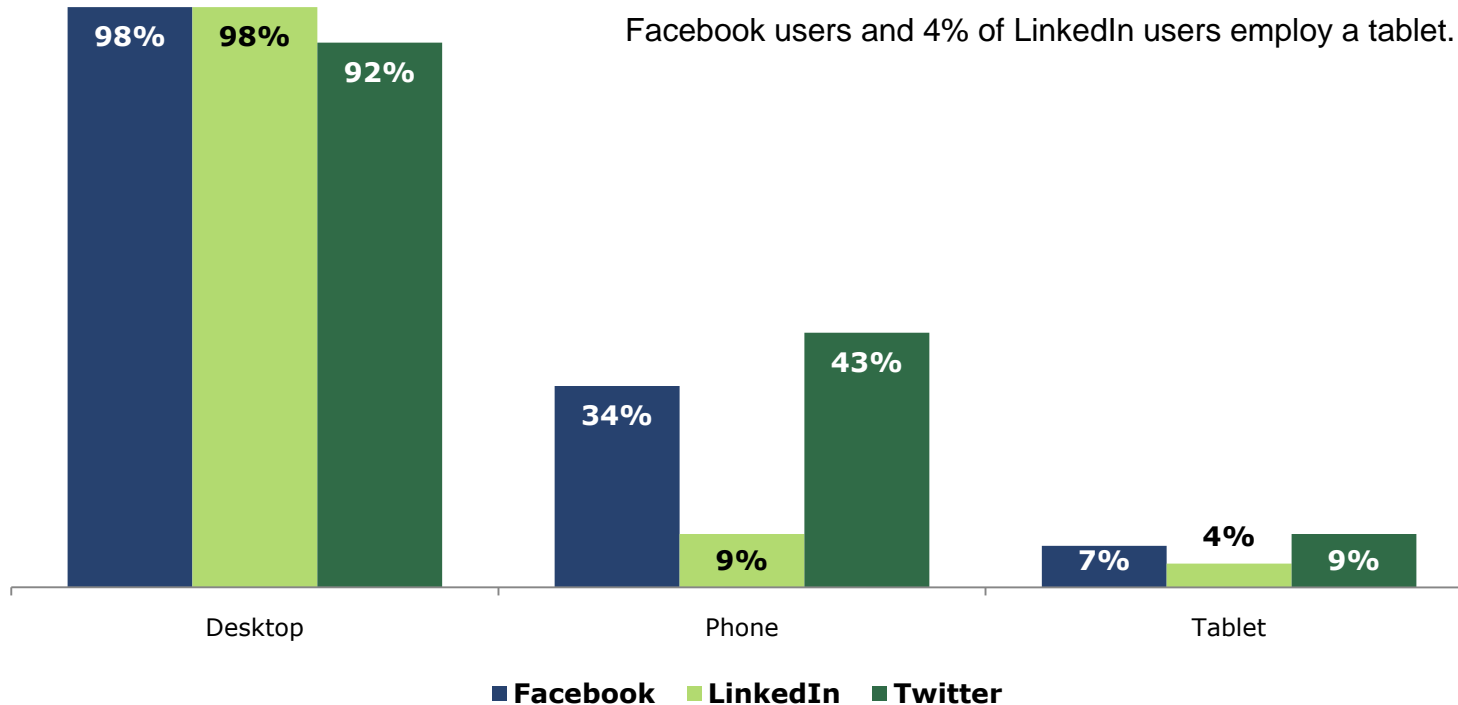
SocNet Convergence Higher from Twitter

Social Media Usage by Location

June 2011, % of respondents

Source: Compete

Twitter users are more likely to perform social networking via mobile device than users of Facebook or LinkedIn, [according to](#) Compete. 43% of Twitter users access via phone and 9% access via tablet. In contrast, 34% of Facebook users access via phone and 9% access via tablet. In contrast, 34% of Facebook users and only 9% of LinkedIn users access social networks via phone, while 7% of Facebook users and 4% of LinkedIn users employ a tablet.

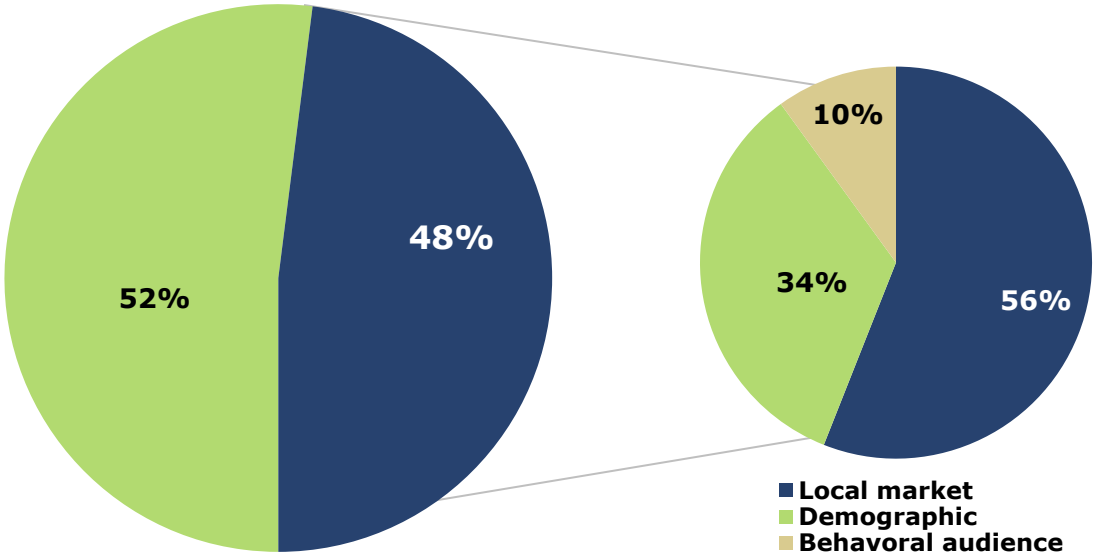


Targeted Ads Up; Local at 56%

Mobile Campaign Targeting Mix

April 2011, % of campaigns

Source: Millennial Media



Targeted-audience campaigns -- local market, demographic, and behavioral audience -- grew 23% month-over-month, 48% of campaigns.

Of those targeted campaigns, 56% targeted a local market, while 34% targeted a demographic and only 10% targeted a behavioral audience.

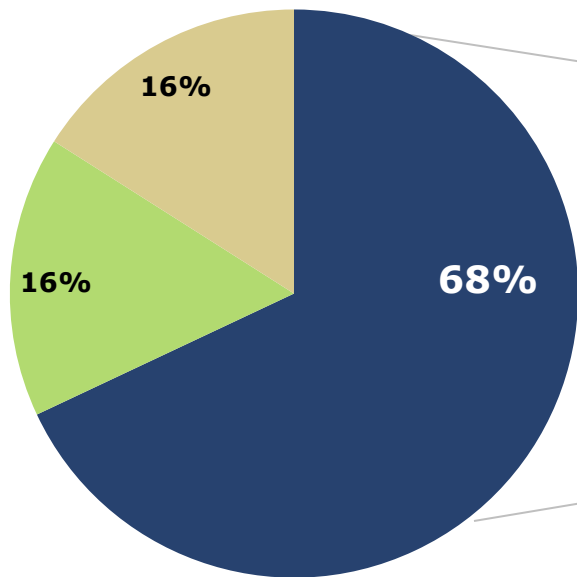
Impressions: Android– 53%, iOS– 28%

Device OS Mix

April 2011, % of campaigns

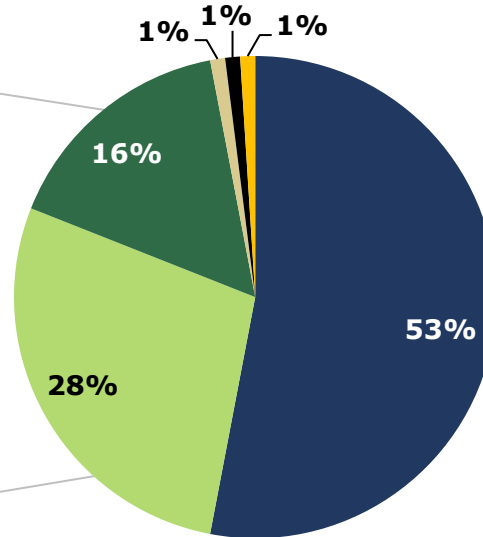
Source: Millennial Media

Device Impression Share



- Smartphones
- Feature Phones
- Connected Devices

Smartphone OS Mix



- Android
- iOS
- RIM
- Symbian
- Other
- Windows Mobile

Smartphones represented 68% of the connected device impressions on the Millennial Media [network](#). Of smartphones on the Millennial network, the two most popular platforms by share of impressions were Android (53%) and iOS (28%).

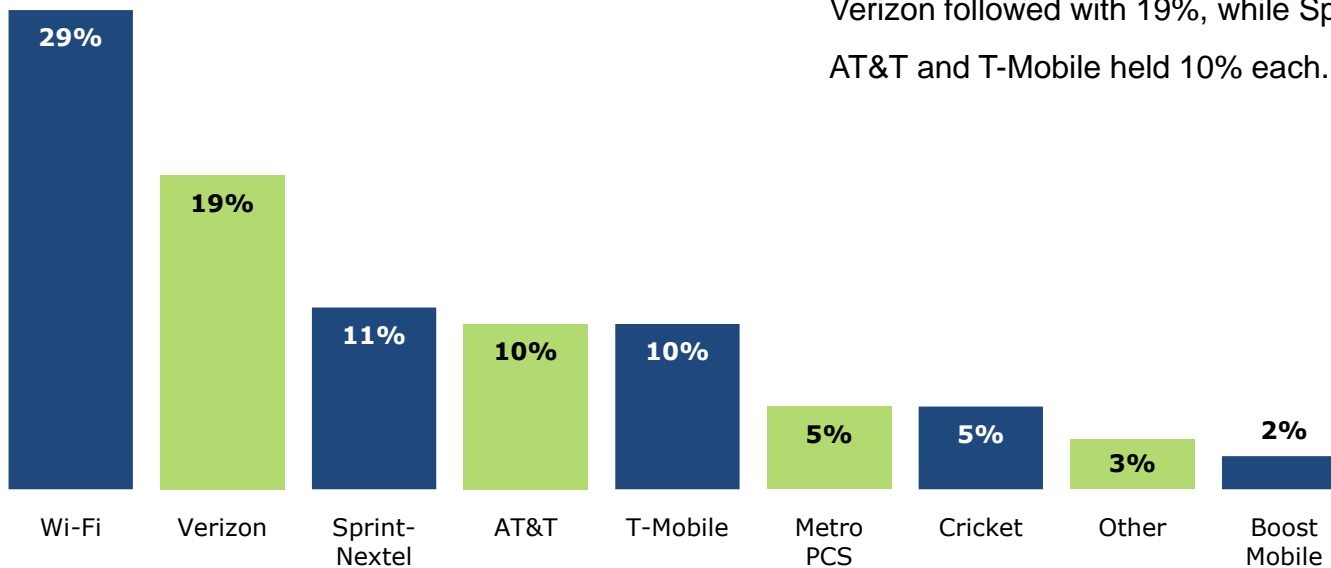
By Branded Carrier, Verizon Has 19%

Device Carrier Mix

April 2011, % of campaigns

Source: Millennial Media

A combination of various Wi-Fi providers was the carrier with the largest share of devices on the Millennial network at 29%. Verizon followed with 19%, while Sprint-Nextel held 11% and AT&T and T-Mobile held 10% each. Metro PCS, Cricket, Other, and Boost Mobile held 5%, 5%, 3%, and 2% respectively.



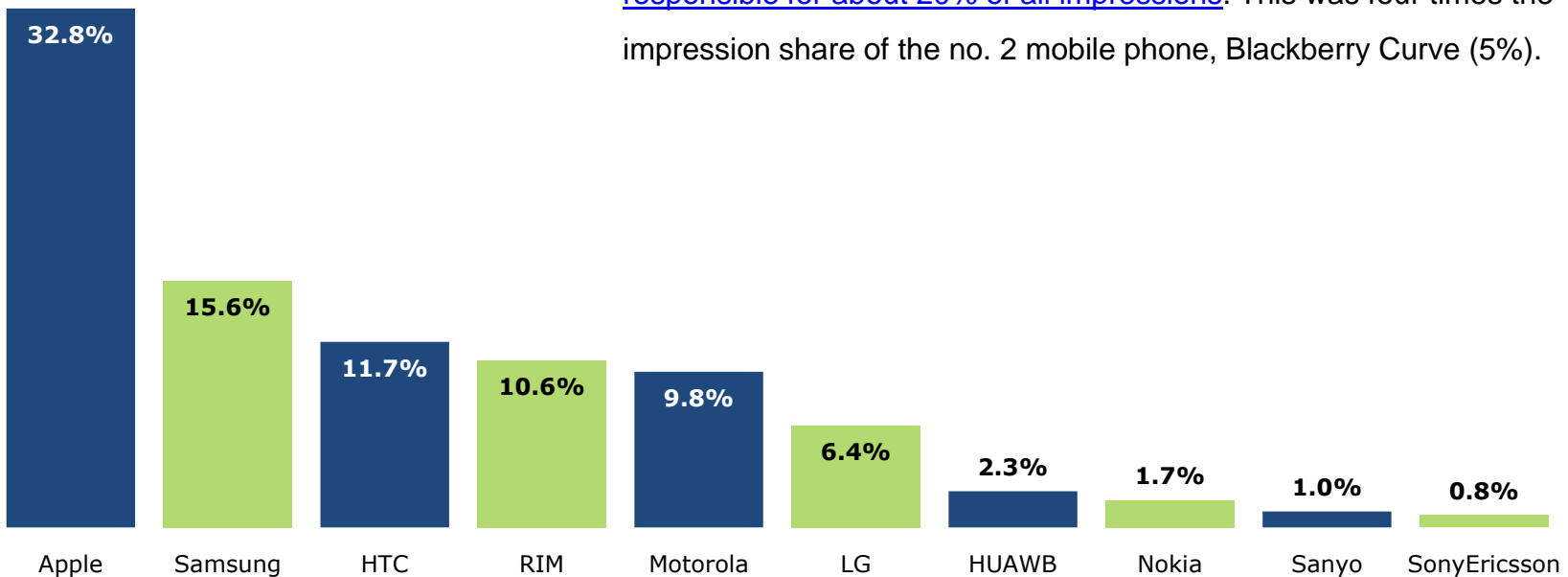
By Manufacturer, Apple Has 33%

Top Manufacturers of Mobile Devices

April 2011, % of campaigns

Source: Millennial Media

Apple, including iPhone, iPad and iPod Touch, represented 32% of impression share by device manufacturer in April. Samsung is the no. 2 device, followed by HTC and RIM. As well, the report found that the Apple iPhone was the most popular mobile phone on the Millennial network in April, [responsible for about 20% of all impressions](#). This was four times the impression share of the no. 2 mobile phone, Blackberry Curve (5%).





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