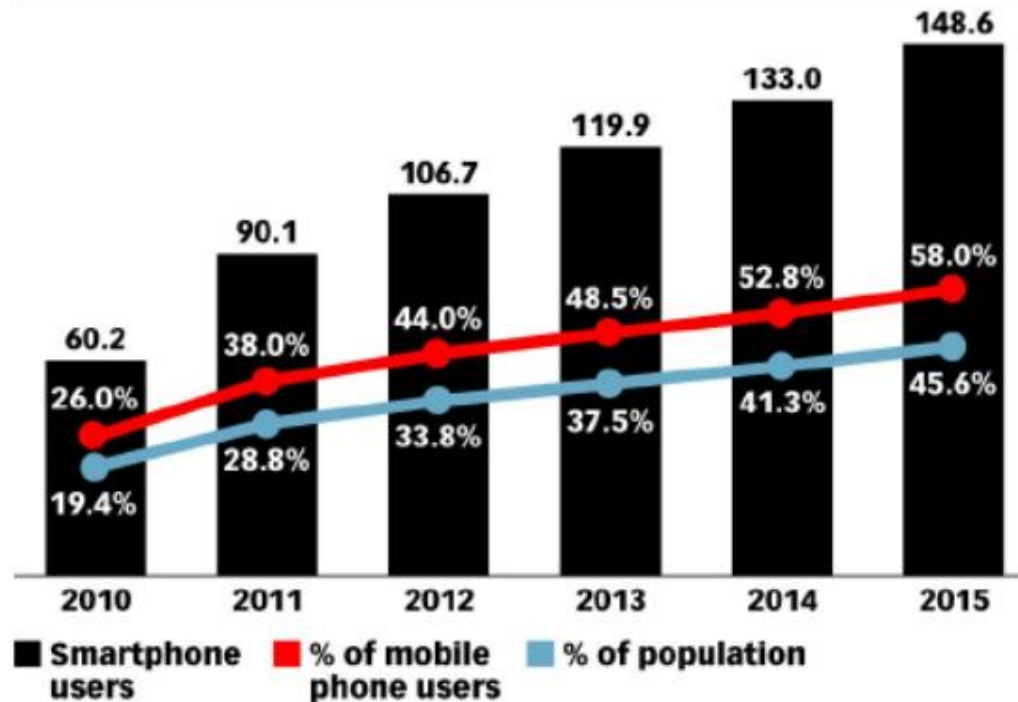

The IAB Mobile Marketing Center of Excellence:

Anna Bager
Vice President and General Manager
IAB MMCoE

Smartphone population on the rise

US Smartphone Users and Penetration, 2010-2015

millions, % of mobile phone users and % of population



Source: eMarketer, Aug 2011

130909

www.eMarketer.com

Source: eMarketer Webinar "Mobile Advertising and Marketing—Key Trends and Benchmarks."

Link: <http://www.slideshare.net/fullscreen/eMarketerInc/emarketer-webinar-mobile-advertising-and-marketingkey-trends-and-benchmarks-9925333/1>

Tablets Define a New Category within Mobile



Source: Forrester Research eReader Forecast, 2010 to 2015 (US)

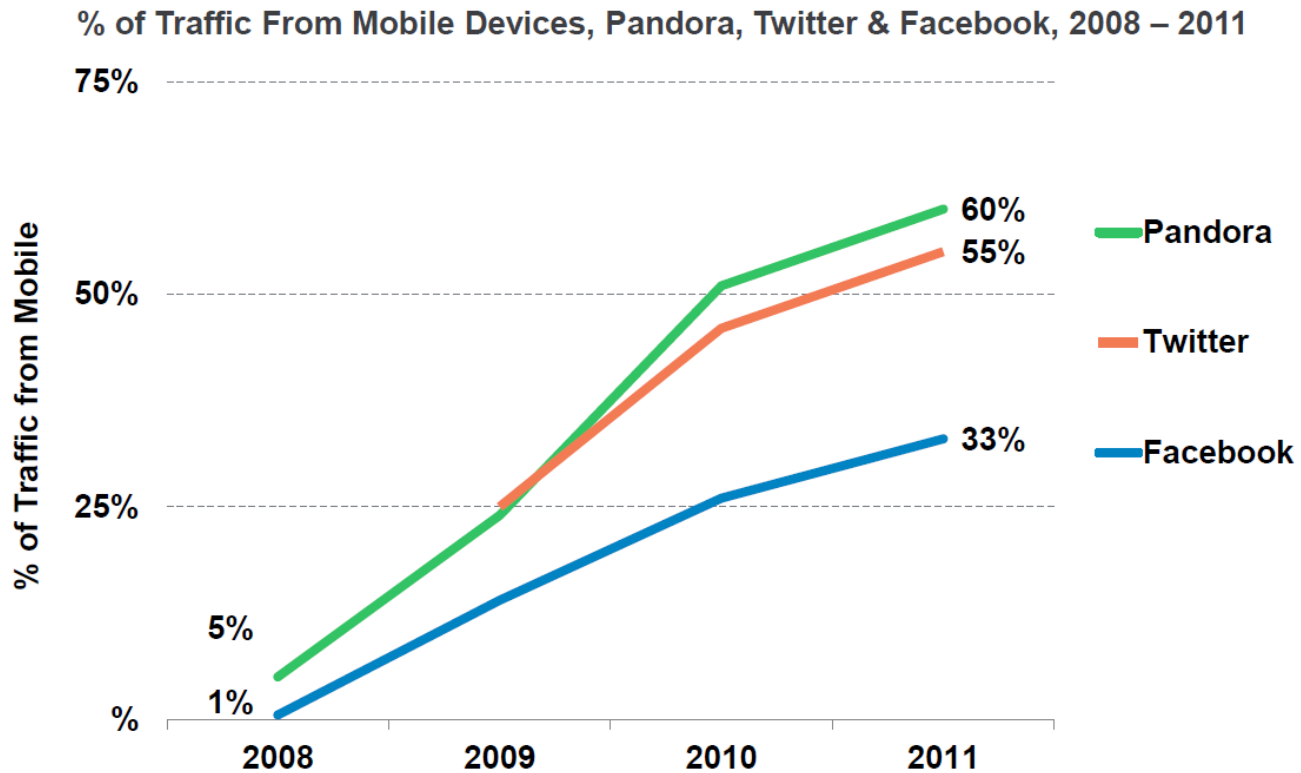
Note: All numbers in millions of US adults

58409

Source: Forrester Research, Inc

- **Apple reported almost 40m total iPads sold as of Oct. 2011**
- **As of July 2011, iPads generated 2.1% of all US Internet traffic**

Mobile Usage – Big & Ramping Fast



Source: Pandora S1, Twitter, Facebook.

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Source: KPCB – Mary Meeker’s Web2.0 Presentation

Link: <http://www.businessinsider.com/mary-meekers-latest-awesome-web-20-presentation-about-the-state-of-the-web-2011-10#-1>

Smartphones Helped Holiday Shopping



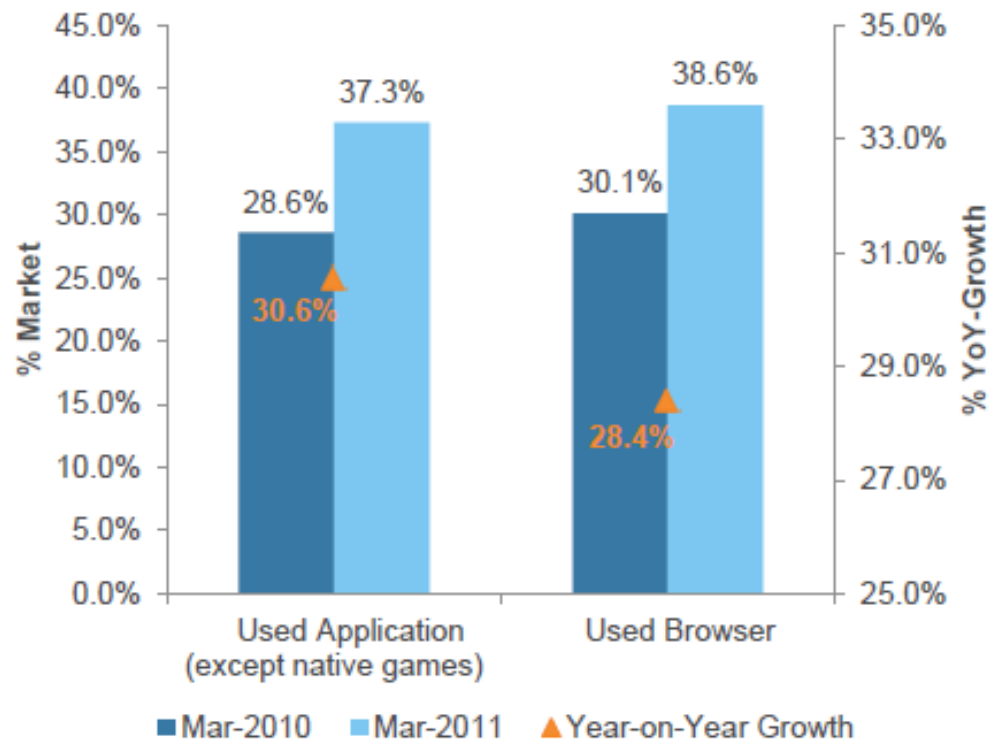
- **29% of smartphone owners planned to use their devices to price compare while holiday shopping**
- **25% planned to send pictures to get opinions on gift items**
- **23% planned to look for product reviews**

Source: Insight Express, "Smartphone Enabled Consumers to Shop Smarter this Holiday Season," Press release, December 6, 2010.

Link: <http://www.businesswire.com/news/home/20101206005250/en/Smartphone-Enabled-Consumers-Shop-Smarter-Holiday-Season>

It's NOT "App Versus Browser." It's BOTH.

Browser and Application Usage Growth



Source: comScore "The State of the U.S. Mobile Advertising Industry and What Lies Ahead" June 8, 2011

Link:

http://www.comscore.com/Press_Events/Presentations_Whitepapers/2011/The_State_of_the_US_Mobile_Advertising_Industry

The Mission of the MMCoE

- Drive growth of the mobile advertising marketplace, and of our members' share of total marketing spend
- To grow IAB's membership among companies focused on the mobile marketplace



Mobile Presents Fantastic Opportunities, but the Hurdles Are High

- It's not clear how to monetize the mobile user/reader
- Marketers and agencies don't understand mobile
- Mobile metrics are nascent, which is a nice way of saying "primitive to nonexistent"
- The mobile advertising supply chain is convoluted, and not configured to integrate multiple media: fixed internet, mobile and offline advertising
- Public policy, increasingly an issue for interactive, creates potential challenges for mobile marketing

MMCoE Grows IAB's Mobile Resources While Drawing on Core Strengths

Mobile Marketing CoE Board of Directors

Supporting Membership

Technology Advisory Board

Mobile
Committee

Tablet/
Device
Committee

Mobile
Local
Committee

Mobile
Measureme
nt & Data
Working
Group

Mobile
Public
Policy
Working
Group

Mobile Ad
Ops
Working
Group

Mobile
Research
Working
Group

Existing Committees

Tied to IAB
Councils

IAB Mobile Marketing Center of Excellence

Board of Directors

AT&T, Maria Mandel
Google, Chris LaSala
Microsoft, Jamie Wells
Millennial Media, Mack McKelvey
Mojiva, Tony Nethercutt
The New York Times, Michael Zimbalist
The Weather Channel, Cameron Clayton
Time Magazine, John Cantarella
Univision, Kevin Conroy
Yahoo!, Inc., Bobby Figueroa
Zillow, Greg Schwartz
Tribune Company, Andrew Vogel

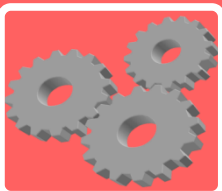
Supporting Members

24/7 Real Media, David Moore
Baby Center, Tina Sharkey
Cars.com, Sharon Knitter
CNN, Greg D'Alba
Federated Media, John Battelle
IDG, Ulla McGee
JumpTap, Paran Johar
Mocean Mobile, Amy Vale
NBC Universal Digital, Julie DeTraglia
Netbiscuits, Craig Besnoy
OWN, Kathleen Kayse
Pontiflex, Stacy Huggins
The Huffington Post, Amanda Donnelly
Tremor Video, Waikit Lau
Unicast, Michael Tuminello
FunctionX, Bernadette Baille

Four Industry Imperatives for Mobile Media



CREATIVE: Balance scale and differentiation



OPERATIONS: Drive costs out of buying



MEASUREMENT: We have to get this right



REGULATION: Respect consumer privacy concerns

IAB Mobile Marketing Center 2011 Achievements

Unify

- Mobile Web Ad Measurement Guidelines
- Prevailing In-App Ad Formats v.2 and v.3
- MRAID 1.0 (Mobile Rich Media Ad APIs)
- N&E Quality Assurance Guidelines-Mobile Addendum
- Launched Project to Create Mobile Code of Conduct with DAA

Educate

- Research: Marketers' Perspectives on Mobile Advertising
- IAB Mobile Media Survey Report: How are you Selling Mobile?
- Tablet Advertising Buyers Guide
- State of Mobile Ad Measurement
- Mobile Round Table Series launched (Ad Lab)
- Mobile Shoppers brief research report

Lead

- Mobile Ad Revenue Study (PwC)
- Mobile Rising Stars Ad Formats Competition
- Launched Technology Advisory Board
- Hired Sarah Hudgins, Director, to lead mobile public policy efforts in DC
- Launched Mobile Committee-Global

Evangelize

- Mobile Stats Deck
- Tablet Ad Creative Showcase
- Conference & Event Participation: In total, Anna, Joe, and Sarah spoke at almost 30 industry events in 2011

2012 Agenda

- Mobile self-regulatory program and lobby fly-in event
- Mobile video (research and ad operations work)
- Mobile cross media ad effectiveness and measurement
- MRAID 2.0
- Mobile web ad and in-app ad measurement guidelines
- Tablet track (research, best practices and evangelization)
- Education and events (case studies, town halls and presentations, including non-NYC events, professional development—including mobile sales class in January)

Suggestions for Research and Events

- **How consumers are using media on different devices**
- **How to sell and how to buy mobile**
 - Buyers Guides: Mobile (ongoing now); Local
- **The intersection of mobile and social**
- **Mobile+social video, mobile+social games**
- **Major Events**
 - Olympics
 - Election and National Conventions
 - Super Bowl
- **Continued research around mobile shopping**
- **Connected TV**
- **TV and mobile**
- **Macroeconomic effects of mobile**
- **Technology Advisory Round Table**

Thanks!

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