

## Overview

There are nearly as many mobile subscribers as there are people in the United States. Every day, hundreds of millions communicate and consume in new ways on devices that are rarely, if ever, beyond four feet away day and night. Best of all, consumers are open to mobile marketing – and brands that understand those behaviors and interests are tapping into this evolution and winning daily.

# US handset breakdown (13+)



feature phones <sup>1</sup>	237,048,000
smartphones <sup>1</sup>	+ 48,552,000
	<hr/>
total mobile phone market <sup>2</sup>	285,600,000

# brand mobile marketing

TOTAL HANDSETS: 20,197,632

41.6%



RIM

TOTAL MARKET SHARE: 7.1%

12,283,656

25.3%



Apple

4.3%

8,739,360

18%



Microsoft

3.06%

2,961,672

6.1%

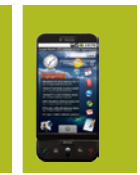


Palm

1.03%

2,524,704

5.2%



Google

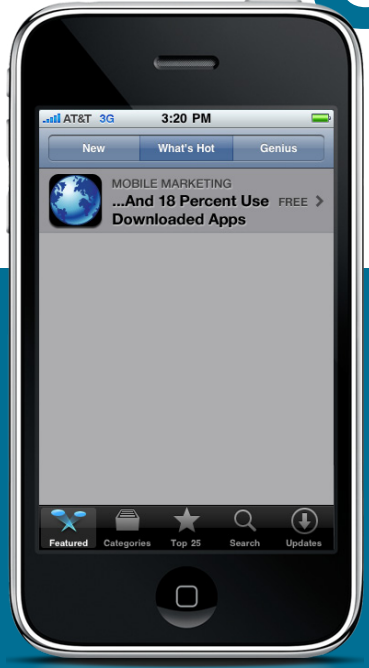
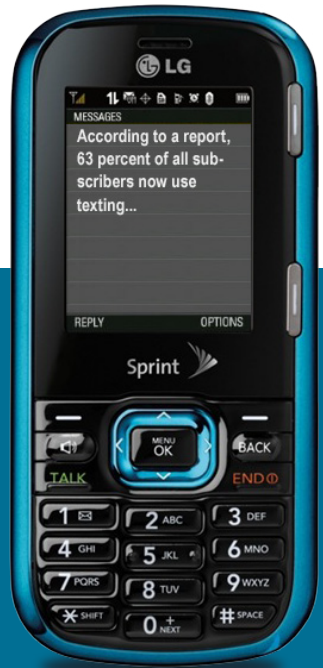
0.88%

total iPhone market share is only 4.3%

THE OVERALL U.S. MOBILE MARKET CONTINUES TO GROW.

subscribers texting 63%

downloading apps 18%



Source: comScore, Dec '09

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37%

INTERESTED IN MOBILE  
LOYALTY CLUB



83%

HAVE YET TO BE REACHED  
BY BRANDS THEY TRUST

Growing consumer interest in mobile marketing and customer loyalty programs has created a significant and largely untapped opportunity for brands to connect with customers on their mobile devices. While 37 percent of consumers would be interested in participating in a mobile customer loyalty program from a brand they trust, 83 percent say their favorite brand has yet to market to them via their most personal device, their mobile phone.

UNLIMITED DATA PLAN USERS



TEXT MESSAGE USERS



MONTHLY SMS MESSAGES

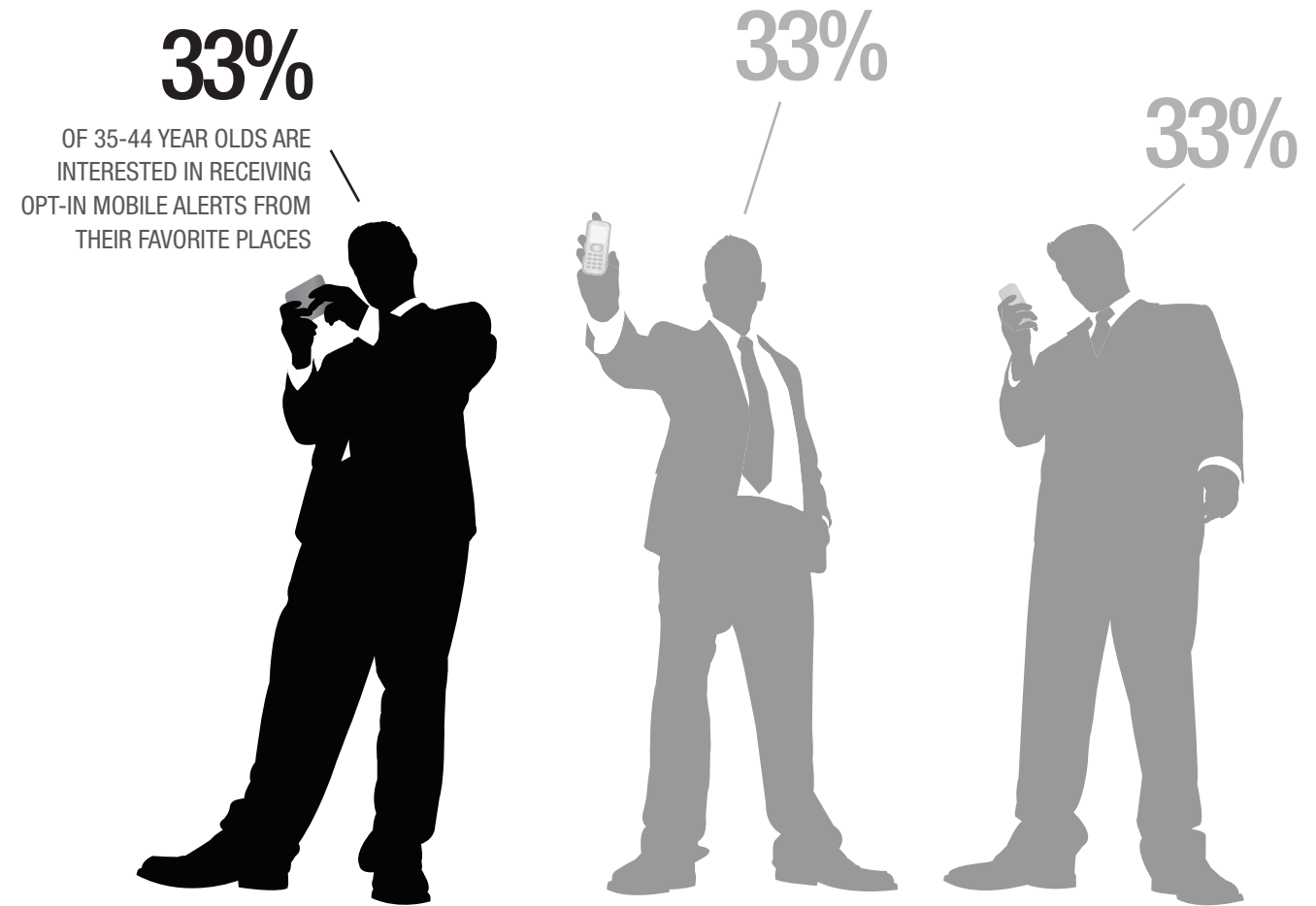


mobile data usage



**50** text messages  
**5** phone calls  
per day

Text messaging is even more prevalent than phone calls. The typical U.S. mobile subscriber sends 50 text messages per day, compared to placing 5 daily phone calls.



# mobile subscriber activity

## (daily, by age group)



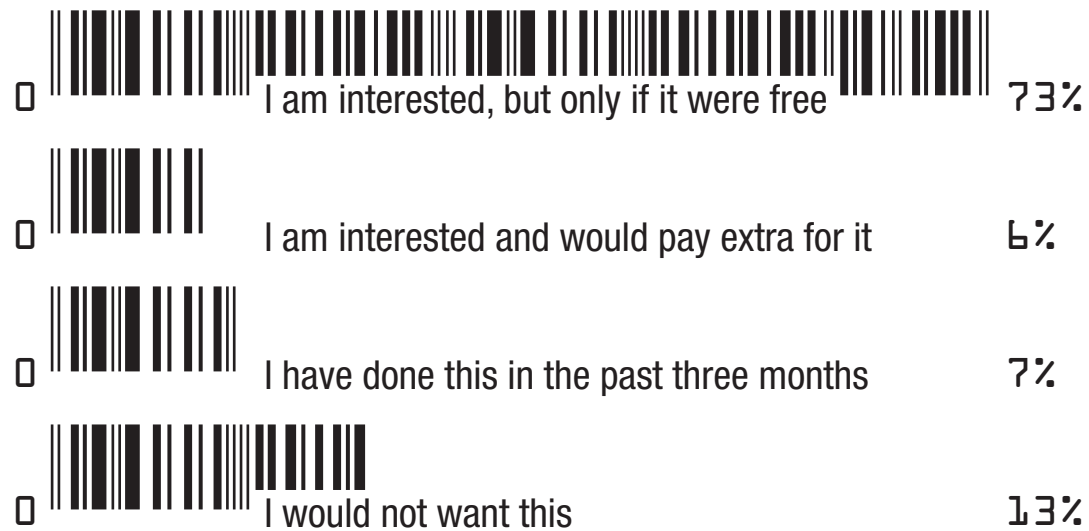
	18 - 29	30 - 49	50 - 64	65+
	74	51	23	5
	37	20	9	3
	21	18	9	3
	35	16	6	2
	5	3	1	1

	RECEIVED SMS AD IN MONTH	RECEIVED SMS COUPON OR DISCOUNT	SENT TEXT
<b>TOTAL</b>	<b>19%</b>	<b>6.6%</b>	<b>60.3%</b>
13 - 17	18.5%	7.6%	80.1%
18 - 24	22.5%	9.6%	82.2%
25 - 34	21.3%	9.1%	78.3%
35 - 44	18.9%	7%	69.2%
45 - 54	19.4%	6.4%	55.2%
55 - 64	13.2%	1.9%	38.8%
65+	7.4%	1%	17.8%

Source: New Media, July 2009

# sms/ mms coupons

INTEREST IN RECEIVING COUPONS VIA SMS/MMS  
ACCORDING TO U.S. CONSUMERS, 2009 (% OF RESPONDENTS)



Note: n=1,931 who would consider mobile couponing; numbers may not add up to 100% due to rounding.

Mobile advertising and marketing could reach **\$820 million in 2010**, up over **60%**; the forecast is for **\$1.9 billion by 2014**, meaning a growth of over **50% per year**.

(Source: Thomas Weisel Partners, 2010)

The mobile retail market will exceed **\$12 billion by 2014** due to one-to-one marketing and smartphone adoption.

(Source: Juniper Research, 2010)

Agencies see their mobile ad business increasing by **33 percent** on average this year, compared with 2009.

(Source: DM2PRO, 2010)

Mobile Marketing to double this year, rising from **4% to 8%** of all online marketing. **By 2013**, about half of all online ad dollars will be spent on mobile.

(Source: Borrell Associates, 2010)