



# Mobile Advertising

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# 157%

Total Mobile Market 2011 vs 2010  
like-for-like



Source: IAB / PwC mobile ad spend survey 2011

£83m

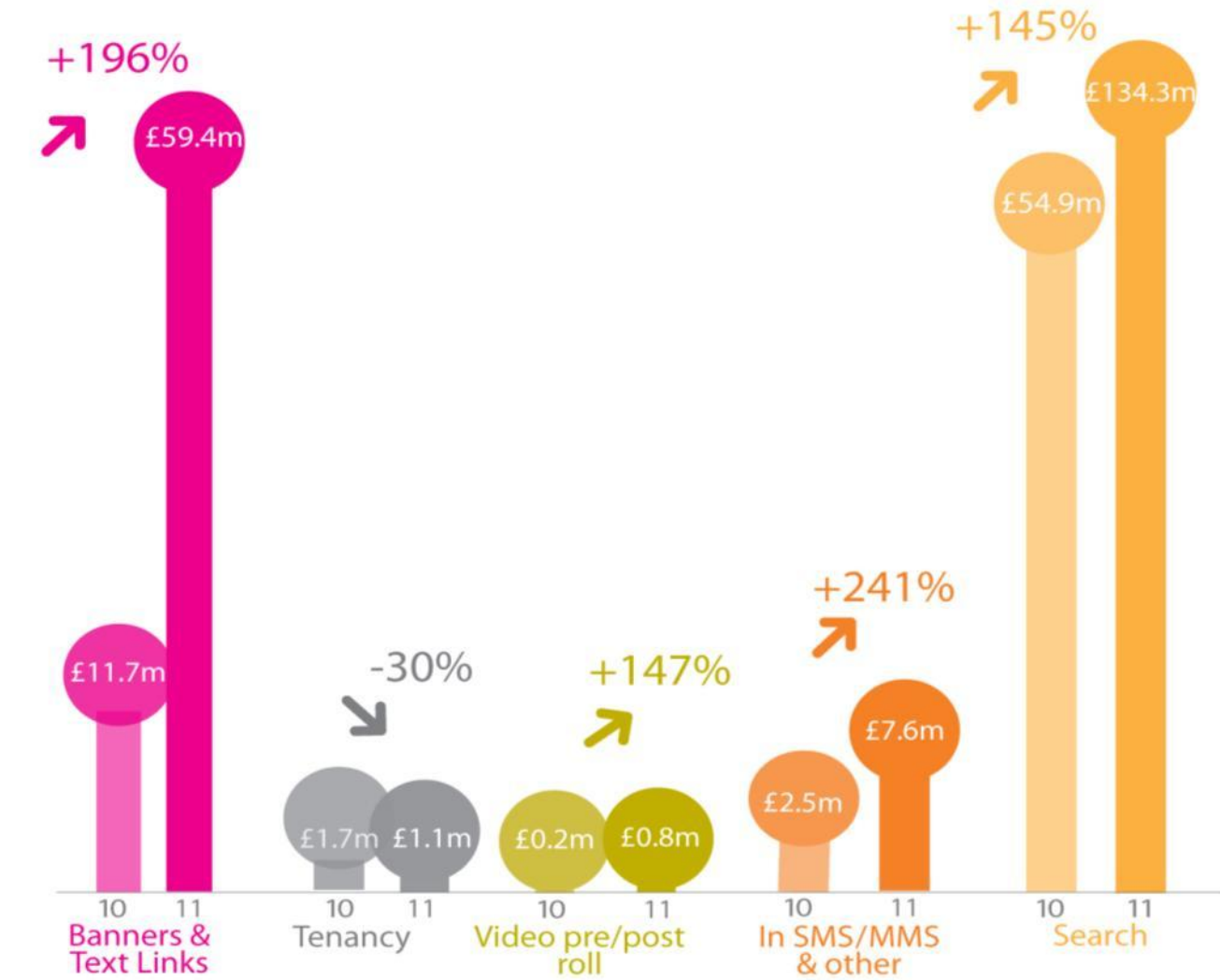
Total Mobile Market 2010

Source: IAB / PwC mobile ad spend survey 2010

£ 203.2m  
Total Mobile Market 2011

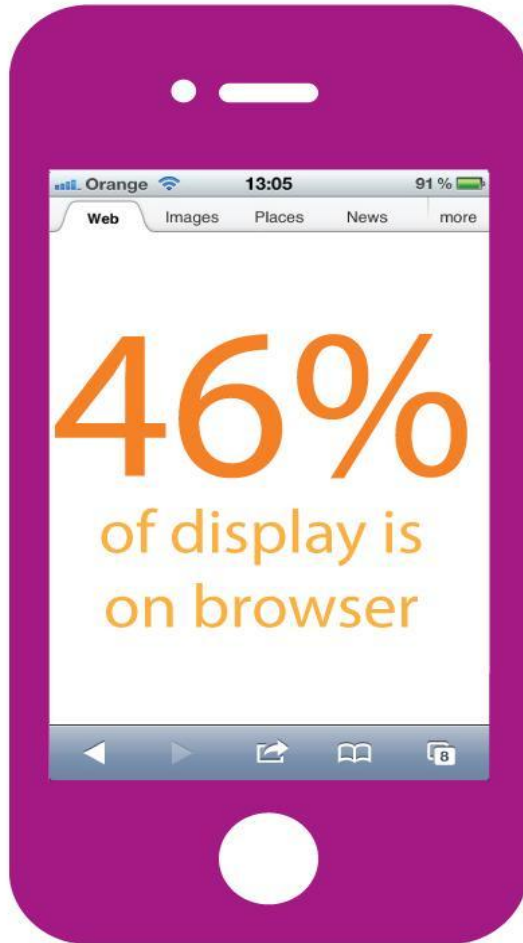
Source: IAB / PwC mobile ad spend survey 2011

# Most formats seeing growth



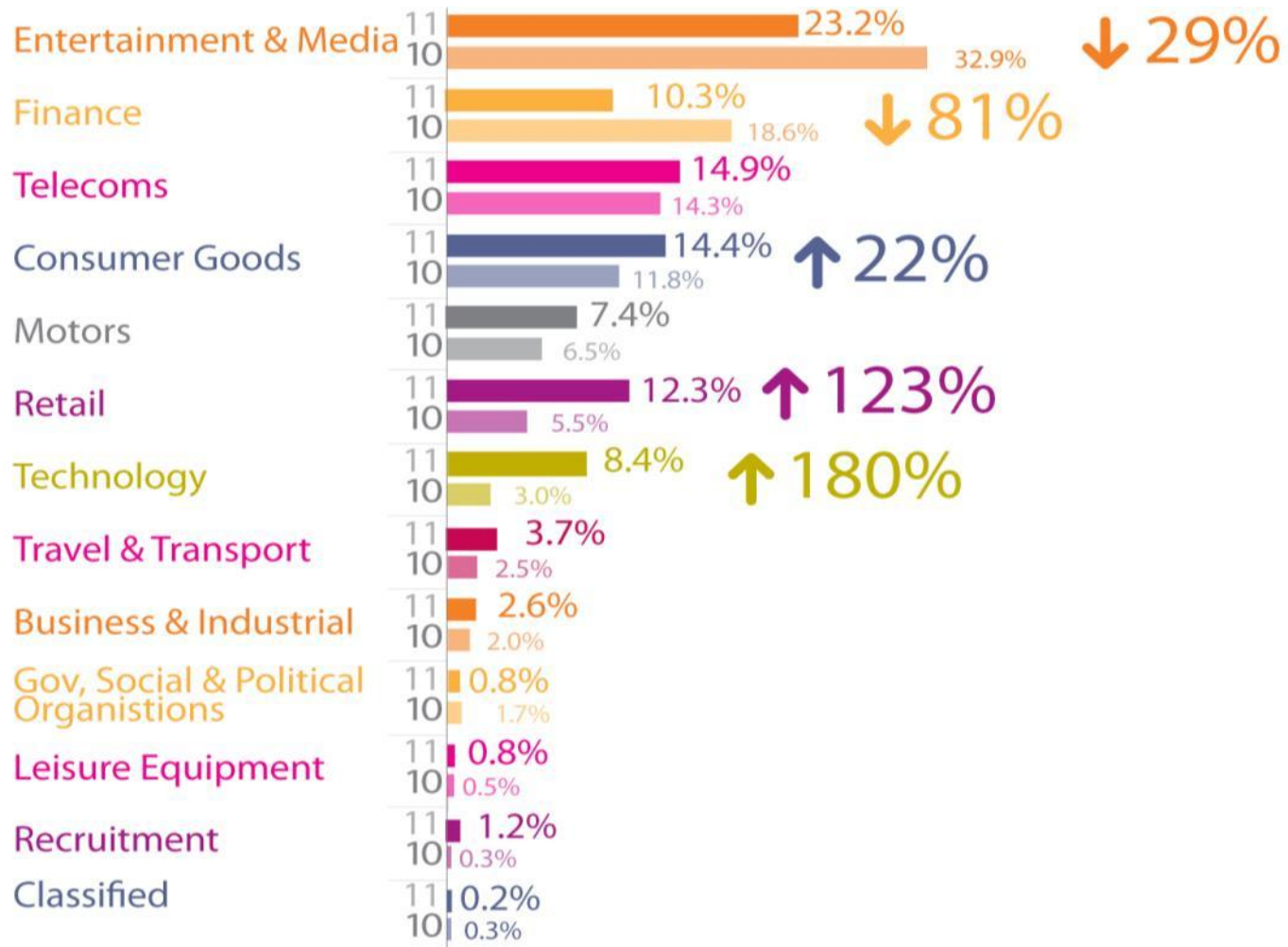
Source: IAB / PwC mobile ad spend survey 2011

# In app revenue outweighs on browser



Source: IAB / PwC mobile ad spend survey 2011 \*Based on a sample of 20 participants and 2 estimated companies (from publicly available information), accounting together for c.68% of total display revenue

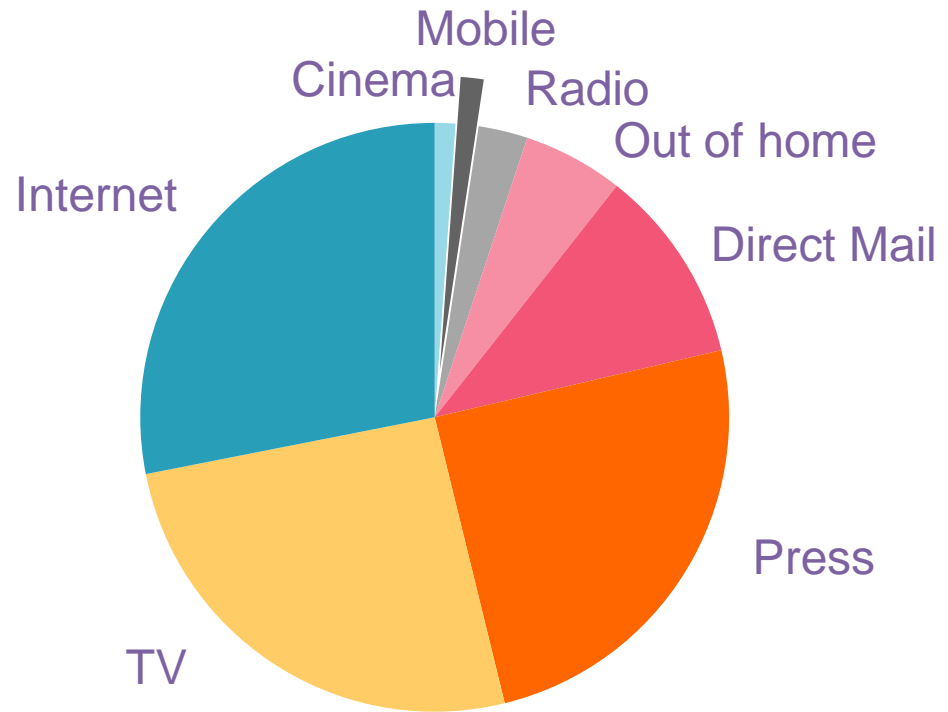
# Change in industry sector display market shares



Source: IAB / PwC mobile ad spend survey 2011



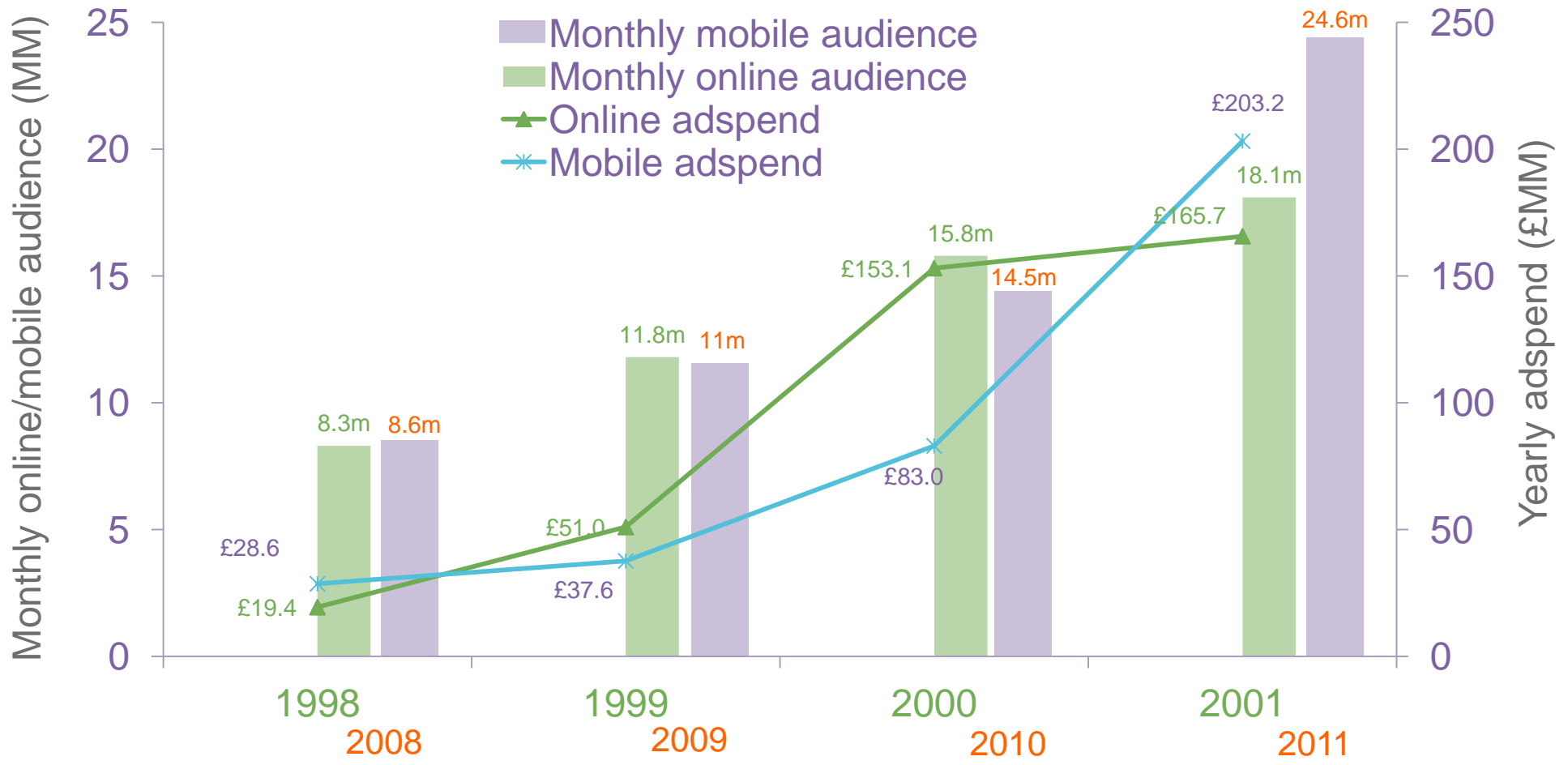
# Mobile spend as part of the media mix



Source: 2011 estimates from The Advertising Association/Warc Expenditure Report., IAB/ PWC Mobile Adpsend Study 2011

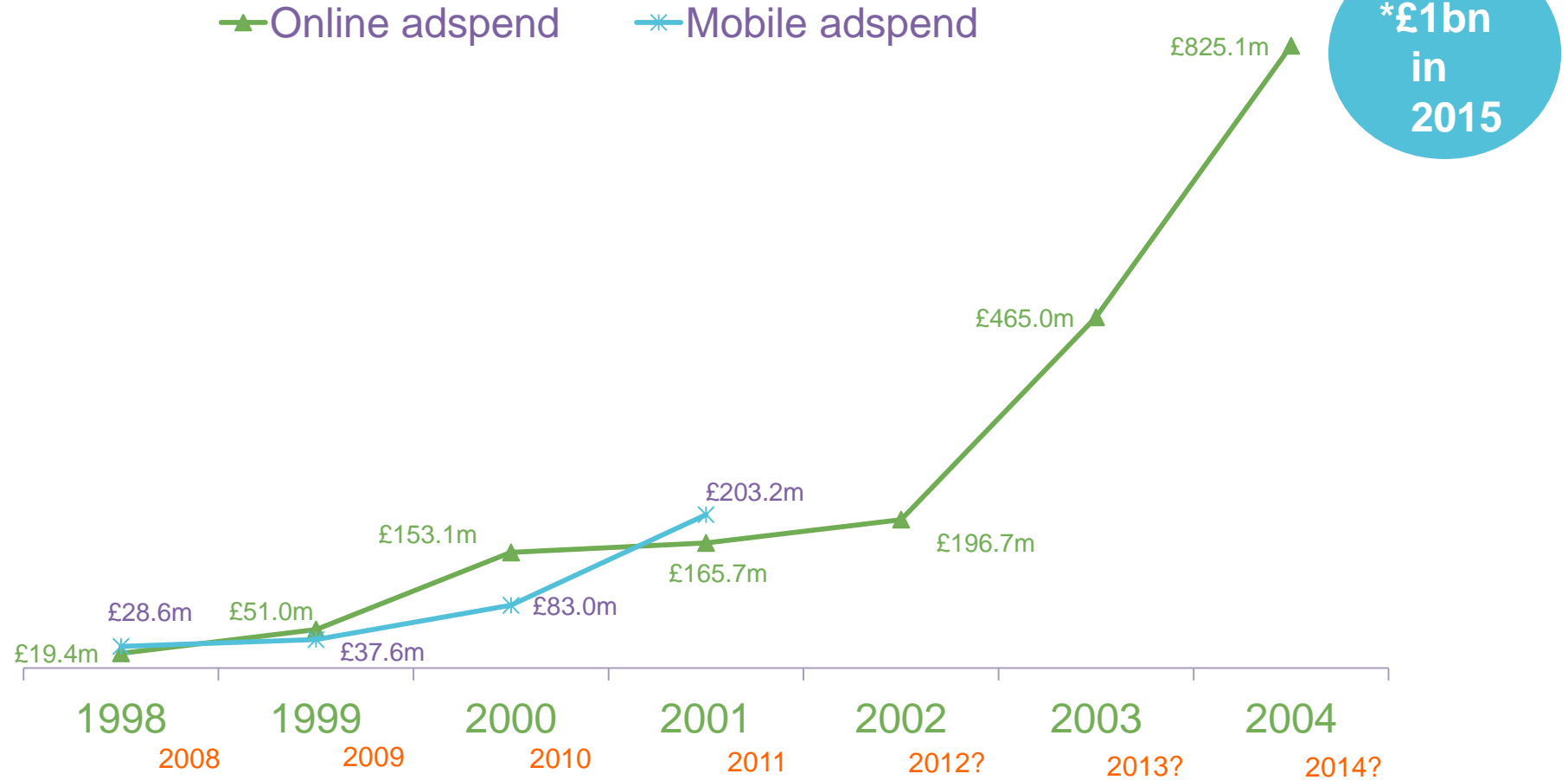


# Mobile's growth echoes online 10 years ago



Source: IAB / PWC Adspend, comScore Mobilens

# Will mobile follow the same path as online adspend?

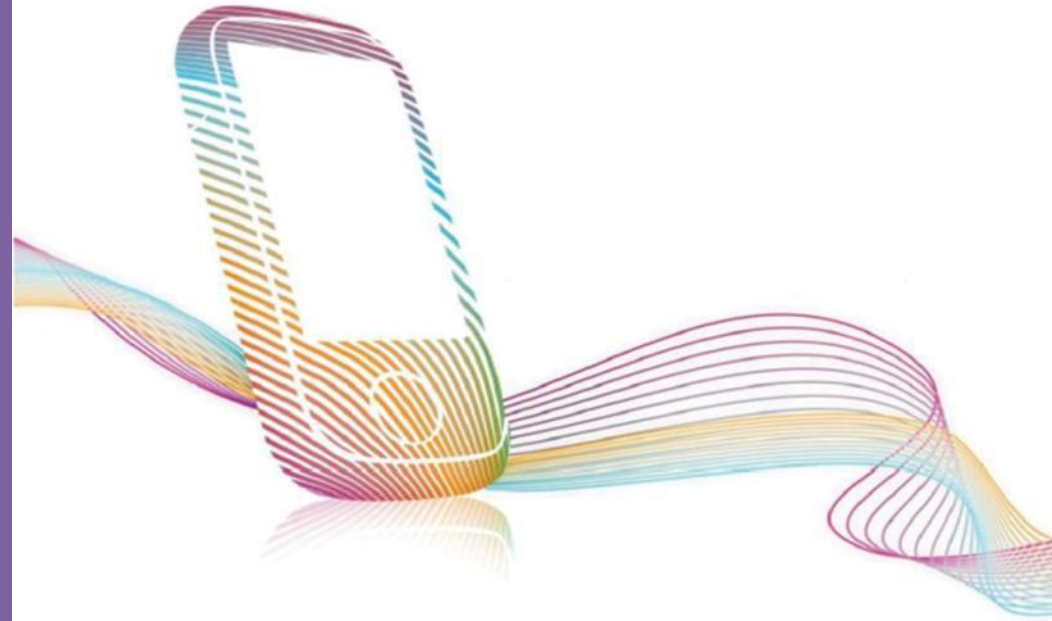


Source: IAB / PWC Adspend

\*Source: First Partner

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The consumer view



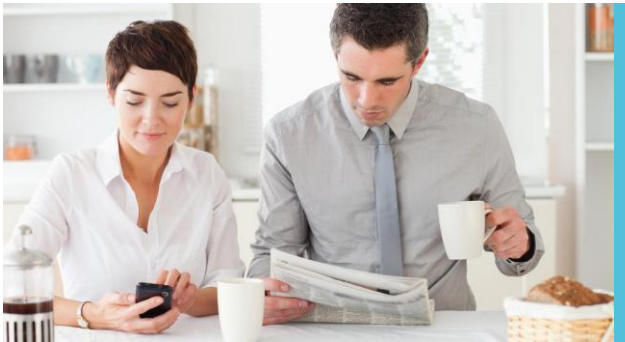
# Mobile Modes

How to Connect with Mobile Consumers

# 3 in 4 consumers accept mobile advertising



Around 1 in 2 consumers notice ads on their mobile, especially those male & younger



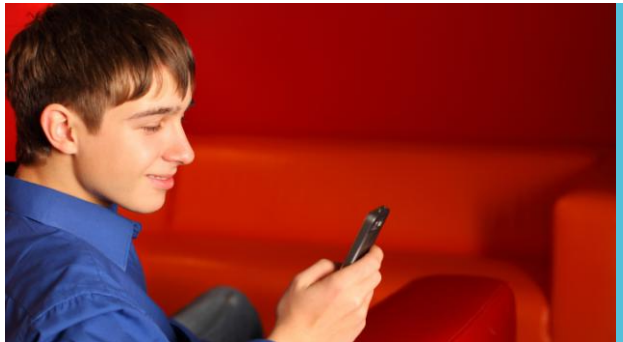
Ad recall is strongest in the morning



Peak time for ad interaction is during break times and when winding down



**Humorous, bold, and graphic rich ads attract consumers most**



**Ads that are relevant, specific and geographically targeted are also effective**



**Despite the small screen size, consumers want mobile ads to personally connect**

- **Be part of the growth**
- **Be around content**
- **Use day parts to optimise metrics**
- **Invest in creative**
- **Respect your mobile consumers**



Source: Mobile modes study with Yahoo!





# Thank you

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