

A dark, moody photograph of a person in a suit holding a glass of whiskey with ice. In the foreground, a black Nokia mobile phone is shown. The scene is dimly lit, with highlights on the person's suit and the glass.

# THE THIRD SCREEN

A STUDY FROM THE *Super Task Force United* BY RDA MARCH 2008

WHAT IS  
MOBILE  
MARKETING?

CHAPTER 1



# WHAT IS MOBILE MARKETING?



**NO. WRONG.**



# WHAT IS MOBILE MARKETING?





# MAIN TEACHINGS

CHAPTER 2



# THE DREAM MEDIUM?

SECTION 2-1



# MOBILE IS KEY

Mobile is our second shadow



# MOBILE IS PERSONAL



Always attributable to one single person

# MOBILE IS UBIQUITOUS



One screen to unite them all

# MOBILE IS IMMEDIATE



# MOBILE IS LOCALIZABLE





# MOBILE IS A GREAT DIRECT MARKETING TOOL



# MOBILE PROVIDES A WIDE RANGE OF MARKETING TOOLS



**SMS  
or Text**  
Short  
Message  
Service



**MMS**  
Multimedia  
Message  
Service



**Web**



**Bluetooth**



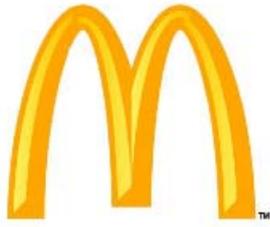
**Location  
Based  
Marketing**



**QR Codes**  
Quick  
Response  
Barcodes

# MC DONALD'S MASS MARKET SWEEPSTAKE

## CANNES SHORTLIST 2006



i'm lovin' it™

Send a text message and get your gift within seconds  
1.5 million participations in 5 weeks



1. POS advertising ▶▶ 2. Buy drink & find code ▶▶ 3. Send in code

▶▶ 4. Win incredible prizes

# VODAFONE'S SECRET CONCERTS





# BBC WORLD'S INTERACTIVE BILLBOARDS

OUTDOOR GOLD LION CANNES 2007 + BEST OF SHOW OBIE AWARDS 2007





# BLUETOOTH BILLBOARDS FOR COLDPLAY'S LATEST ALBUM



MOBILE  
ADVERTISING IS  
NO HEAVEN YET  
(RATHER A VERY PROMISING  
PURGATORY)

SECTION 2-2

# MOBILE MARKETING AS A STANDALONE WILL FAIL



Integration is key to success

## MOBILE MARKETING IS NOT CHEAP

Higher CPM than other traditional media



# MOBILE WEB IS NOT CHEAP FOR THE END USER EITHER



**\$34.99**  
on top of  
phone bill



**\$99.99**  
web+phone



**\$49.99**  
on top of  
phone bill



**\$39.99**  
on top of  
phone bill



Sources: Sprint, T-Mobile, Verizon and AT&T for plans, November 2007

# MOBILE'S ECOSYSTEM IS STILL CONSOLIDATING





# MOBILE LANDSCAPE

CHAPTER 3

# MARKET FACTS

SECTION 3-1



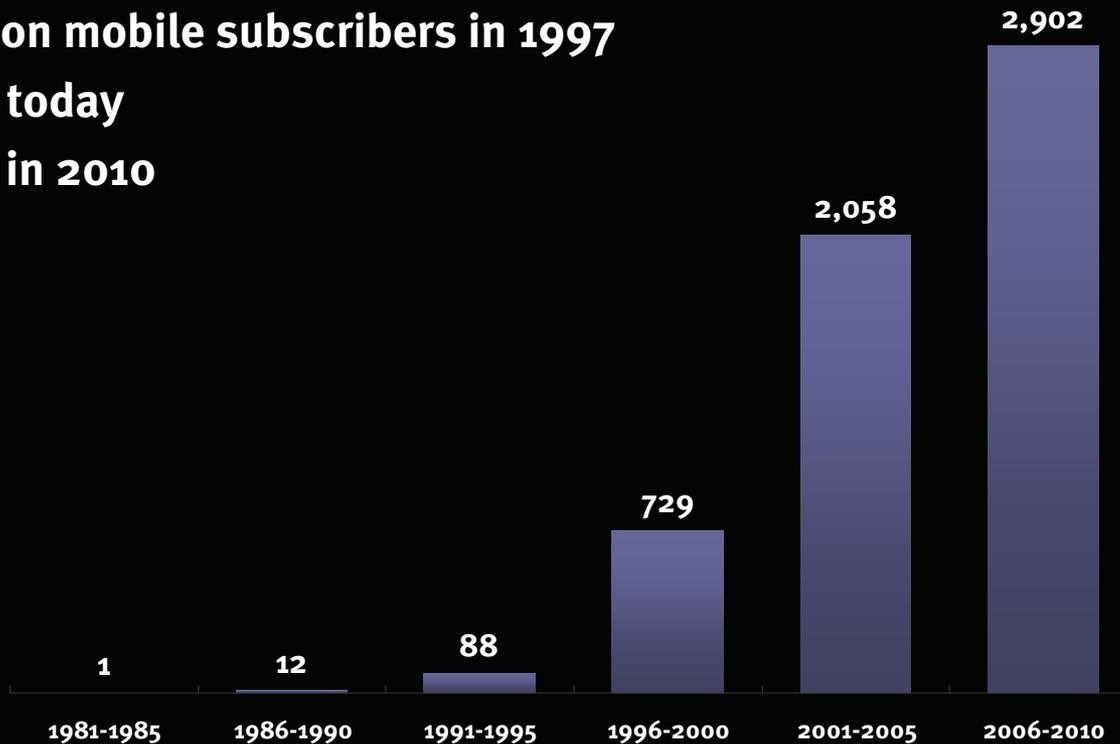
## THE THIRD SCREEN IS ALREADY THE FIRST

**2 billion mobile  
subscribers today**  
1.2 billion TV households  
670 million PC users

# PENETRATION OF MOBILE PHONES HAS BEEN EXPLOSIVE



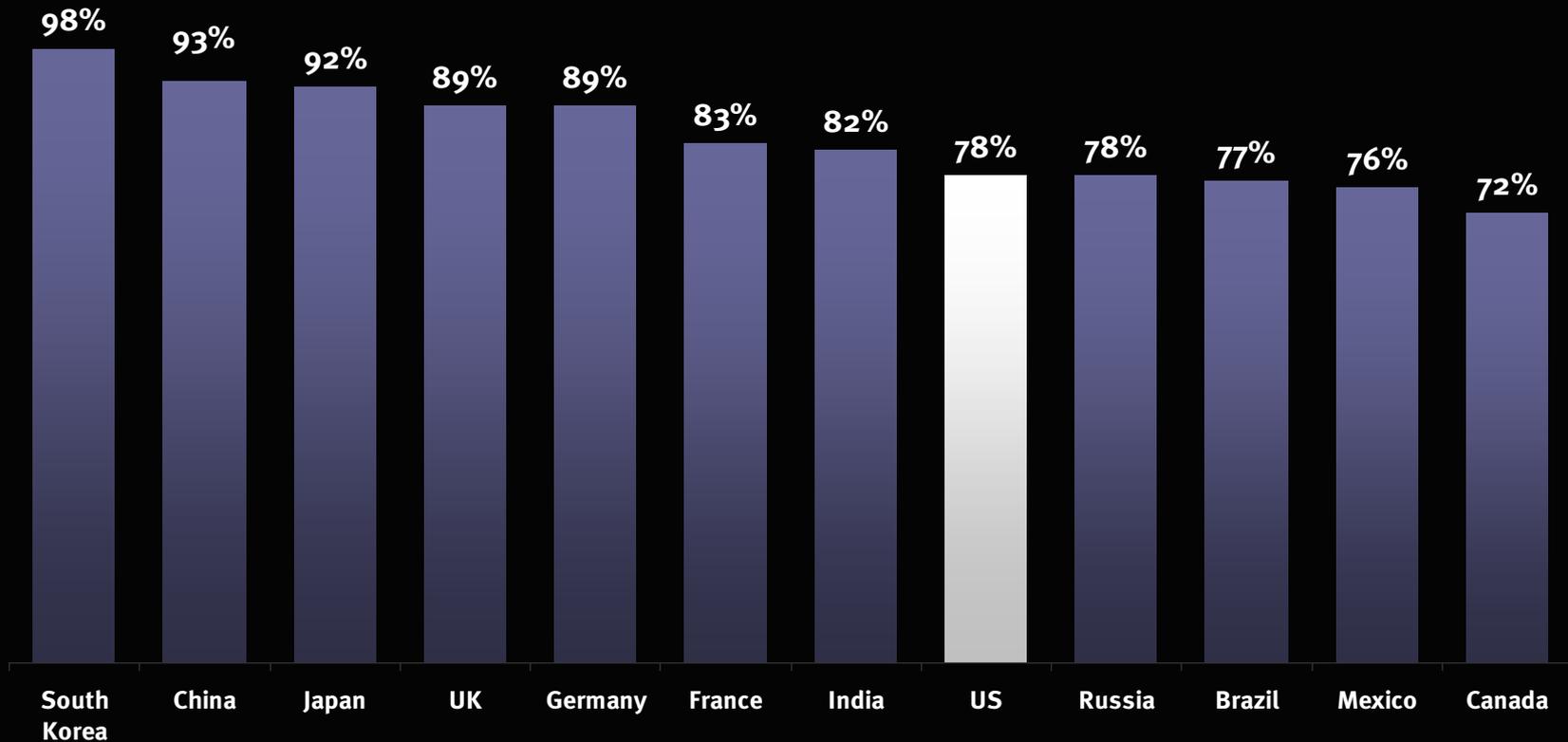
**215 million mobile subscribers in 1997**  
**2 billion today**  
**3 billion in 2010**



## Worldwide Mobile Subscription (in millions)

Source: Informa Telecoms & Media, April 2006.

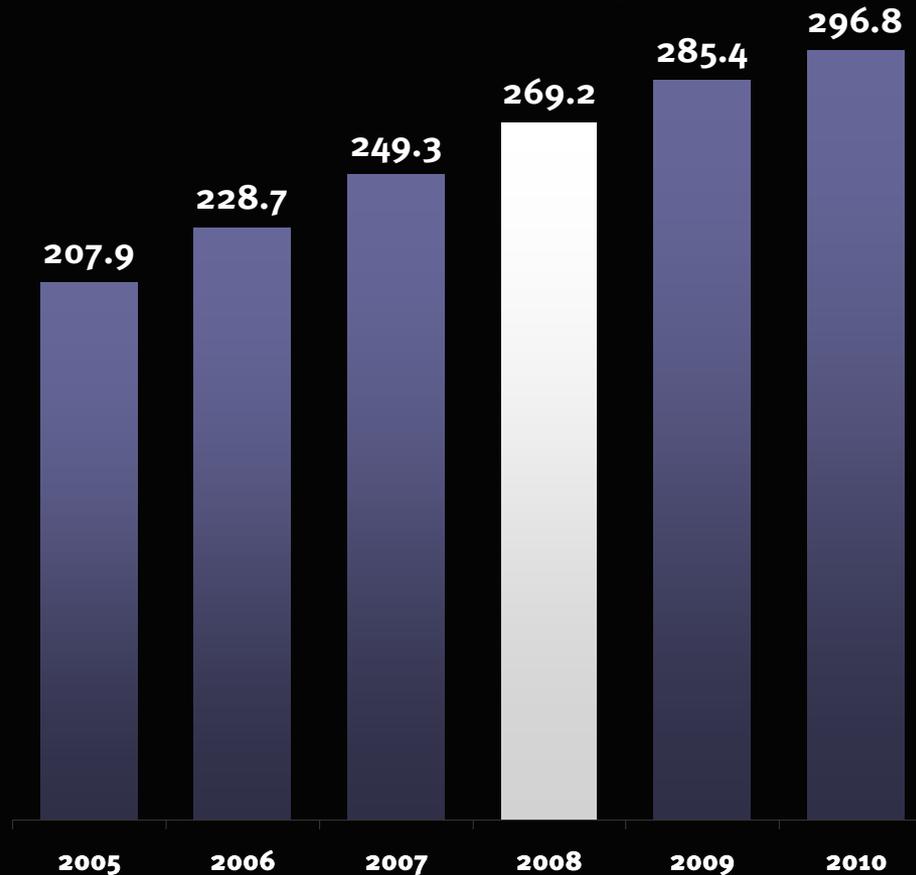
# THE U.S. IS CATCHING UP TO EUROPE & ASIA IN MOBILE PENETRATION



**Household Mobile Penetration by Country in 2006**  
(in %)

Source: IPSOS, Face of the Web 2007

# MOBILE PHONES WILL BE UBIQUITOUS IN THE U.S. BY 2010



## U.S. Mobile Subscription (in millions)

Source: eMarketer, August 2006

# A VERY OLIGOPOLISTIC CARRIERS' DANCE



<b>Cingular Wireless</b>	<b>61 million subscribers</b>	<b>26.2%</b>
<b>Verizon Wireless</b>	<b>59.1 million subscribers</b>	<b>25.3%</b>
<b>Sprint Nextel Corp</b>	<b>53.1 million subscribers</b>	<b>22.8%</b>
<b>T-Mobile USA Inc</b>	<b>25 million subscribers</b>	<b>10.7%</b>
<b>Alltel</b>	<b>11 million subscribers</b>	<b>4.7%</b>
<b>Other</b>	<b>24 million subscribers</b>	<b>11.3%</b>
<b>TOTAL</b>	<b>233.2 million subscribers</b>	<b>100%</b>

**80% of the market**

Sources: ctia.org for the total number + respective carriers websites



# MOBILE LIFE

SECTION 3-2

## MOBILE IS A SECOND SHADOW



**1<sup>st</sup> thing you check when you wake up**  
**Last thing you check when you go to bed**  
**Within arm's reach 80% of your day**

# MOBILE IS AN EXTENSION OF OUR BODY



**Personal**  
**Intimate › Privacy**  
**Singularizing › Identity**

# MOBILE IS AN ADDICTION



## Phantom Vibration Syndrome (or Vibranxiety)

92% of owners cannot get through a typical day without using their phone



# MOBILE USAGES

SECTION 3-3

# WHAT DO WE DO WITH OUR MOBILE PHONES?



## COMMUNICATION

SMS

eMail

Picture Messaging

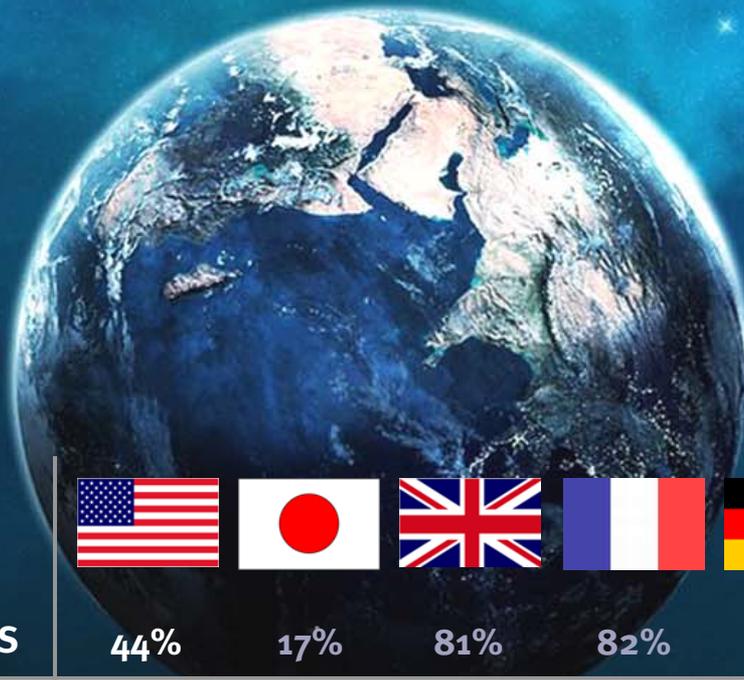
Send/Receive Videos

Social Networking

Blogging



# MOBILE PHONES ARE MORE THAN JUST VOICE



						
<b>Text/SMS</b>	44%	17%	81%	82%	87%	77%
<b>Photo Messaging (MMS)</b>	10%	7%	33%	33%	32%	40%
<b>Mobile Internet</b>	11%	20%	16%	15%	7%	19%
<b>Mobile E-Mail</b>	9%	57%	10%	12%	8%	16%

## Mobile Messaging and Internet use by Mobile Phone Users

Source: Office of Communications "The International Communications Market 2007", December 2007

# WHAT DO WE DO WITH OUR MOBILE PHONES?



## COMMUNICATION

- SMS
- eMail
- Picture Messaging
- Send/Receive Videos
- Social Networking
- Blogging

## PERSONAL PRODUCTIVITY\*

- Check Weather
- Search the Web
- Maps/Directions
- Movie info
- Stock Quotes
- Financial news
- Business directories
- Restaurant info
- Trading Stocks
- Transactions

\*Source: M:Metrics, January 2007.  
Items classified in decreasing order of importance

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## NEWS BITES

- News
- Product Info/reviews
- Tech news
- Health/Sport
- Sports Information
- Entertainment News
- Horoscope

# WHAT DO WE DO WITH OUR MOBILE PHONES?



## COMMUNICATION

- SMS
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## NEWS BITES

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- Entertainment News
- Horoscope

## PASSING TIME

- Play video games
- Download ringtones
- Download wallpapers
- Download videos
- Download music

MOBILE AS AN  
ADVERTISING  
PLATFORM

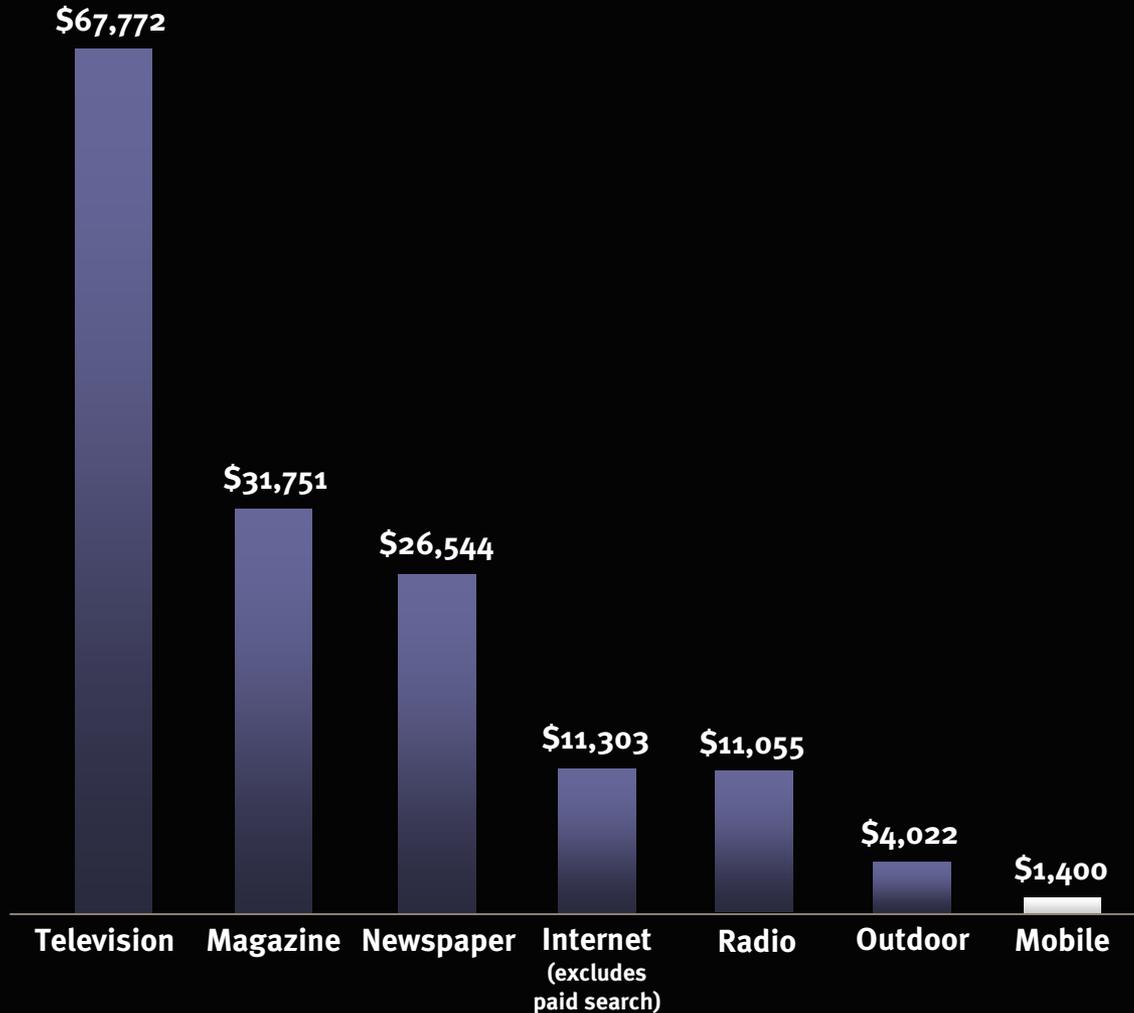
SECTION 3-4

# MOBILE MARKETING IS STILL IN THE EARLY STAGES...



## U.S. Advertising Spend by Media in 2007 (in Millions)

Source: TNS Media Intelligence, Mar 2008 + earketer, Oct 2007 (mobile) + IAB, Feb 2008 (Internet)





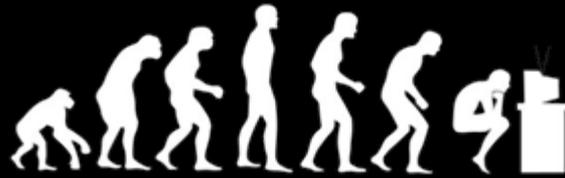
## ... BUT IT'S GROWING FAST



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**In two years from now, mobile advertising  
should be as big as Internet advertising is today**

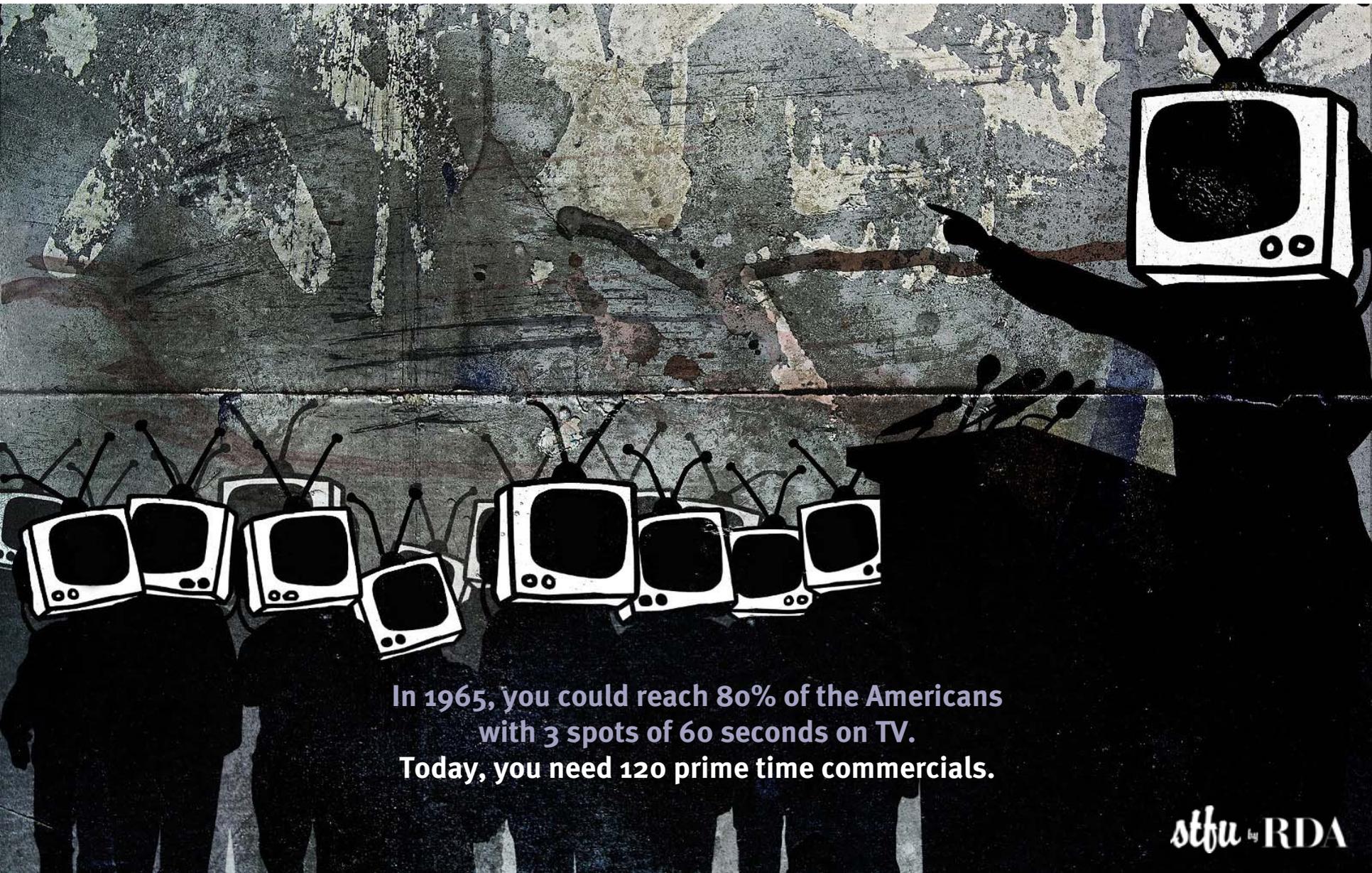
(Source: eMarketer, October 2007 + ABI Research, 2007 + Informa Telecoms & Media, February 2007)



# THINKING MOBILE

## CHAPTER 4

## THE FIRST SCREEN



In 1965, you could reach 80% of the Americans  
with 3 spots of 60 seconds on TV.  
Today, you need 120 prime time commercials.

# THE SECOND SCREEN

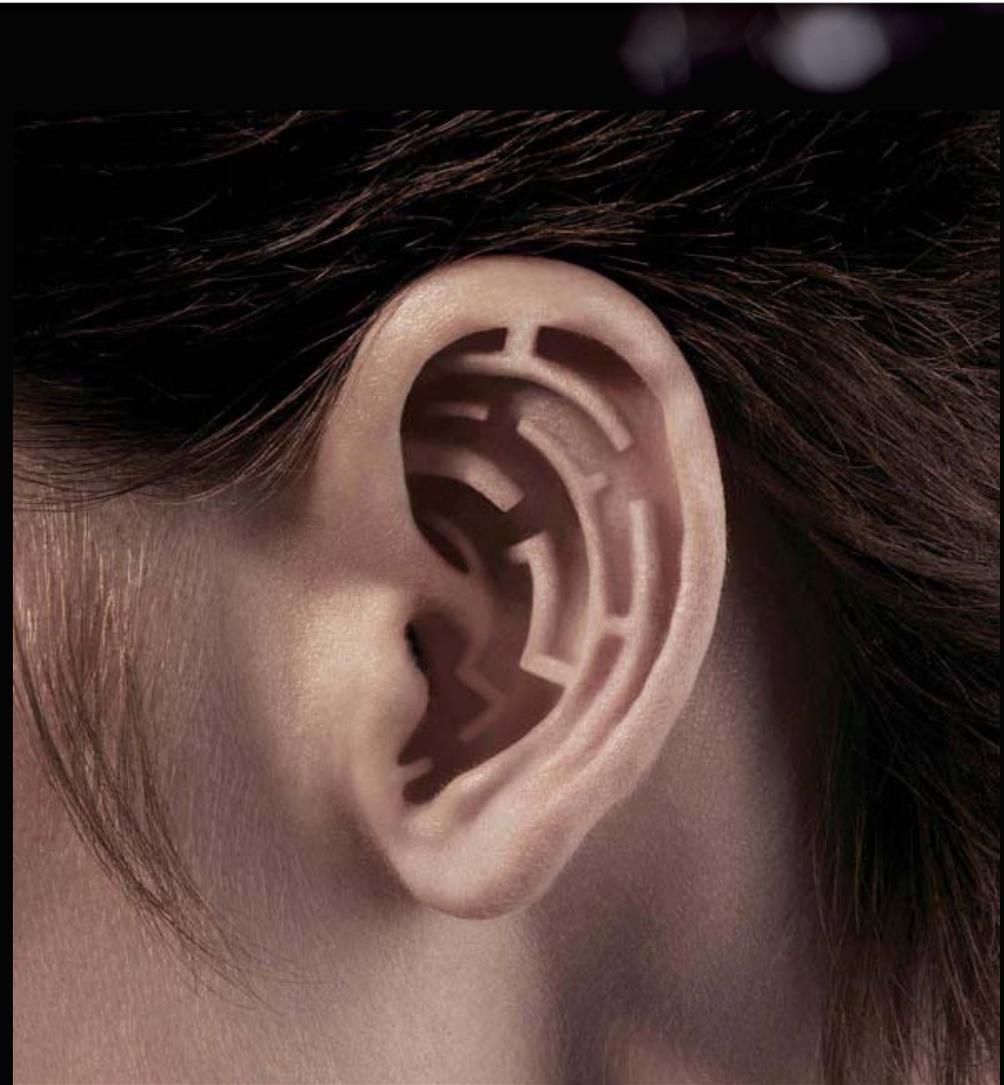
**From Information to Communication**



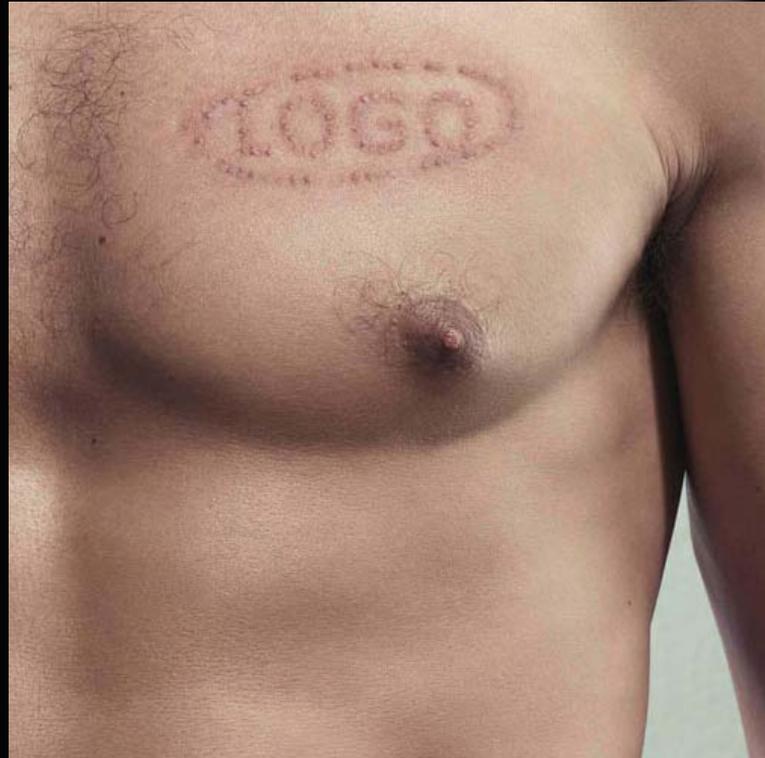
## THE THIRD SCREEN



# PEOPLE CAN NOW ESCAPE ADVERTISING



# MOBILE MARKETING IS ANTICIPATED TO BE AS IRRITATING AS OTHER ADVERTISING

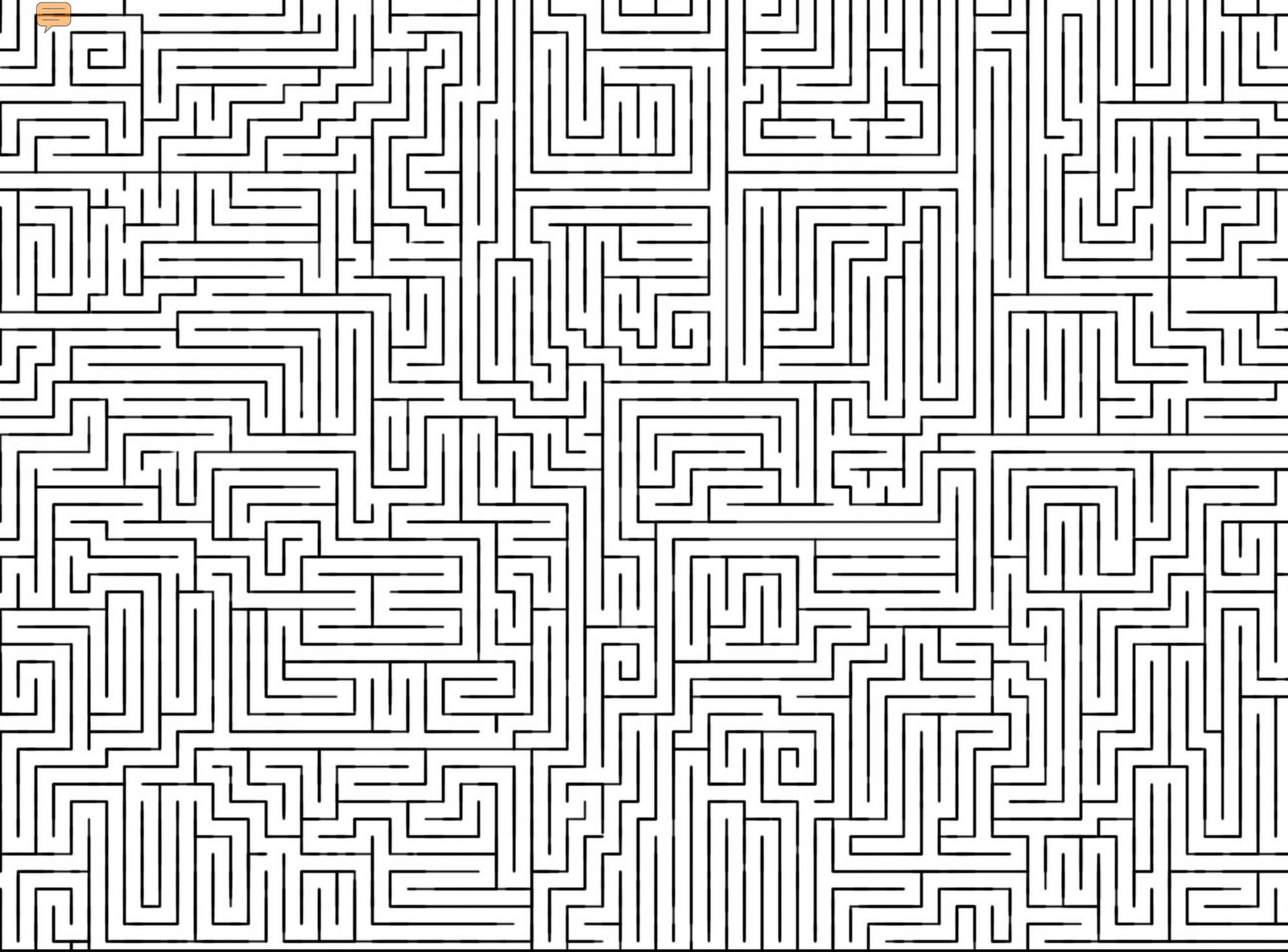


**90% of U.S. users are not at all interested in mobile marketing**

(Source: Harris Interactive study for eMarketer, 2007)

**79% of consumers are annoyed by the idea of mobile marketing**

(Source: Forrester, 2007)



## 3 GOLDEN RULES TO LOWER THE PAIN OF MOBILE ADVERTISING

**Choice**  
Opt-in

**Control**  
Opt-out

**Consideration**  
Entertainment  
Information  
Interactivity

# PUSH | FORCE-FEEDING

NO. WRONG.



## PULL | USER-INITIATED



# INVENTORY

## CHAPTER 5

# MOBILE PROVIDES A WIDE RANGE OF MARKETING TOOLS



**SMS**  
or Text  
Short  
Message  
Service



**MMS**  
Multimedia  
Message  
Service



**Web**



**Bluetooth**



**Location  
Based  
Marketing**



**QR Codes**  
Quick  
Response  
Barcodes

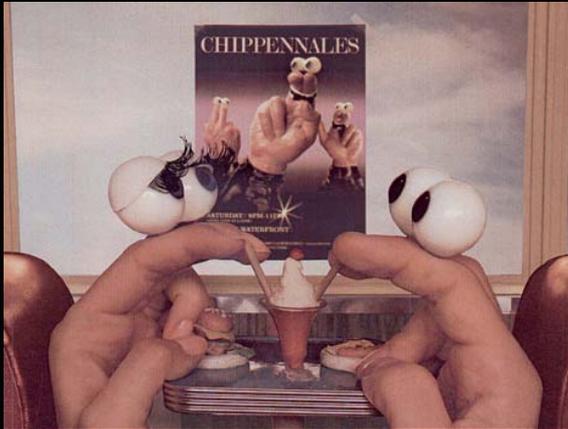
SHORT  
MESSAGE  
SERVICE  
(SMS)

SECTION 5-1

A FAST AND CONVENIENT WAY  
TO REACH POTENTIALLY EVERYONE



# FINGERS' DEMOCRACY IS TAKING OVER VOICE'S DICTATORSHIP



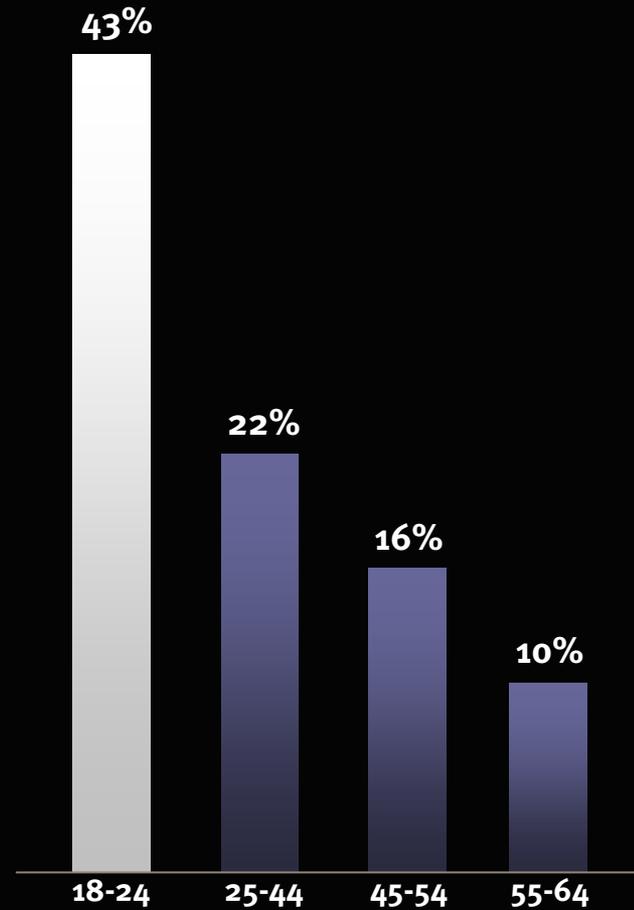
People already text more than they call  
5,000 SMS sent per second in the U.S.

# TEXT MESSAGING IS YOUTH'S PREFERRED CHANNEL



## % of U.S. users using text messaging daily

Source: InsightExpress, Mobile A&U Research Results, Sept 2007



# SMS/TEXT MESSAGING IS A LIMITED OPPORTUNITY TO CONNECT EMOTIONALLY WITH THE AUDIENCE



**CLICK**

*GLUG GLUG*

*Munch*

*Glug Glug*

**MUNCH**

Click



SMS/TEXT  
CAMPAIGN  
EXAMPLES

# NIVEA UK | PURE DEODORANT

TEXT PRIZE-DRAWING





# NEWSPAPER'S MISSING PICTURES

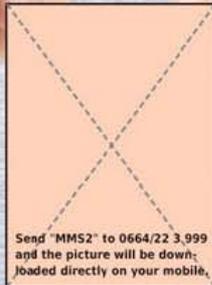
## GOLD LION CANNES 2003 FOR USE OF MEDIA



# Rumsfeld "kidnapped" by mobile operator.



Send SMS to receive picture.



Send "MMS2" to 0664/22 3 999 and the picture will be downloaded directly on your mobile.



# DER STANDARD

SA./SO., 25./26. JANUAR 2003 | ÖSTERREICH'S UNABHÄNGIGE TAGESZEITUNG | HERAUSGEBEREN VON OSCAR BRONNER | € 1,10

Graz wählt: Erster Test für Stärke der VP Seite 18, Kommentar Seite 40

## Irakkonflikt

THEMA Neue Spaltung in Europa Seite 2, ALBUM Seiten 31 und 39 Henryk M. Broder: Kanzler Schröder wird es billiger geben S. 39 Kopf des Tages US-Minister Donald Rumsfeld, Kommentar S. 40

### Chancen für große Koalition sinken: Heftige Wortgefechte

Gehrer: „Doppelspiel der SP“, Prammer: „Kein friss, Vogel, oder stirb“

### USA kündigen Beweise gegen Bagdad an

Washington/Bagdad/Wien - Die USA haben wenige Tage vor dem Start der UN-Waffeninspektionen im Südbereich des Iraks versprochen, Beweise für die Existenz von Massenvernichtungswaffen im Irak vorlegen zu wollen. Der US-Staatssekretär für Abrüstungsfragen, John Bolton, erklärte Freitag, dass sich vor allem britische Langstreckenaerosole, denen bereits drei Mal seit dem Golfkrieg 1991 verdächtigt sei, im Streit um einen Irakkrise zwischen Deutschland und den USA befinden. Bolton erklärte, dass die USA die Beweise gegen Bagdad anfordern werden.

### Radikale Palästinenser unterstützen Saddam

JMWG2 per SMS an 0664/222 3 999 senden und das Bild kommt per MMS direkt auf Ihr Handy.

Galli als italienischer Herrscher Italien: Fast-Chronopolismus Giovanni Agnelli, Foto: Reuters

Turke - Italien trauert um Giovanni Agnelli (91). Der Fiat-Einigerpräsident hat am Freitag einen Krebsleiden erlitten. Während einer Übergangsphase wird Agnelli hingegen wieder Umberto das Haupt der Confindustria übernehmen. Danach könnte der Industriemagnat, der Partner von der 20-jährige John Philip Edwards, um die Spitze des Konzerns rücken, (red) S. 34

JMWG2 per SMS an 0664/222 3 999 senden und das Bild kommt per MMS direkt auf Ihr Handy.



# SEND AN ANONYMOUS MESSAGE TO YOUR DRUNK FRIEND

DIRECT GOLD LION CANNES 2007



1.



2.



3.

Nationwide media attention

**STOP YOUR MATE DRIVING DRUNK**  
**WITH ONE OF OUR ANONYMOUS MESSAGES**

Text one of our names and your mate's cellphone number to 2255  
 (e.g. SURGEON 02X XXX XXX to 2255)

**PLASTIC SURGEON**  
**NURSE**  
**HOTLINE**  
**HOME HELPER**

**BLOODY LEGENDS**

Texts cost 20 cents each. The advertiser is Land Transport NZ. The campaign will end at advertiser's discretion. The advertiser takes no responsibility for late, lost or undelivered texts or voice messages. Queries should be directed to 0800 999 747 between the hours of 9am and 5pm, Monday to Friday.

Poster

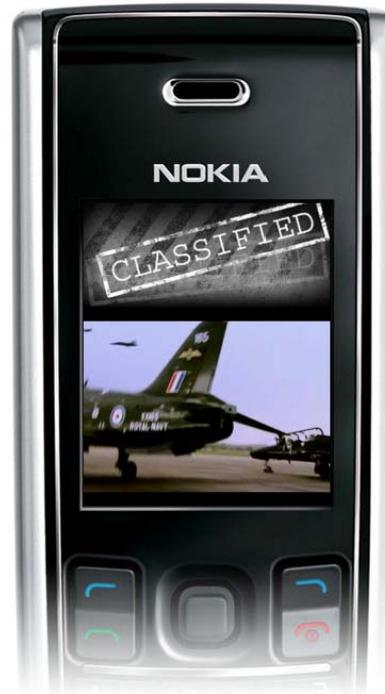
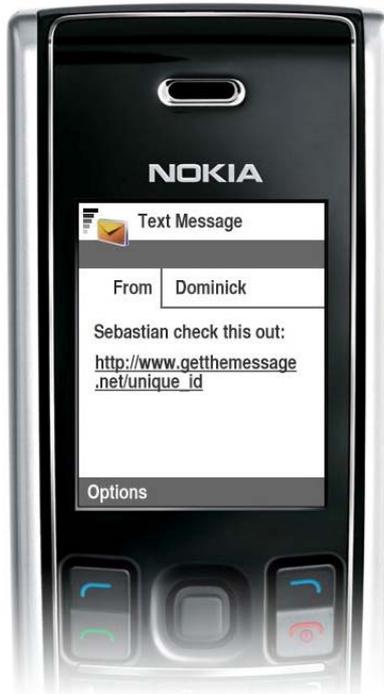


Coasters



# ROYAL NAVY RECRUITMENT CAMPAIGN

BRONZE CYBER LION CANNES 2007



# THE MOBILE WEB

SECTION 5-2



# MOBILE WEB IS NOW ACCESSIBLE ON MOST HANDSETS

**60% of U.S. mobile subscribers  
can access the mobile Internet**



# THE U.S. MOBILE WEB IS ALREADY MADE OF 60 MILLION SOULS



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**19% of U.S. consumers access the web from their mobile phones**

# MOBILE WEB IS STILL A YOUNG, WELL-ESTABLISHED MAN GAME...

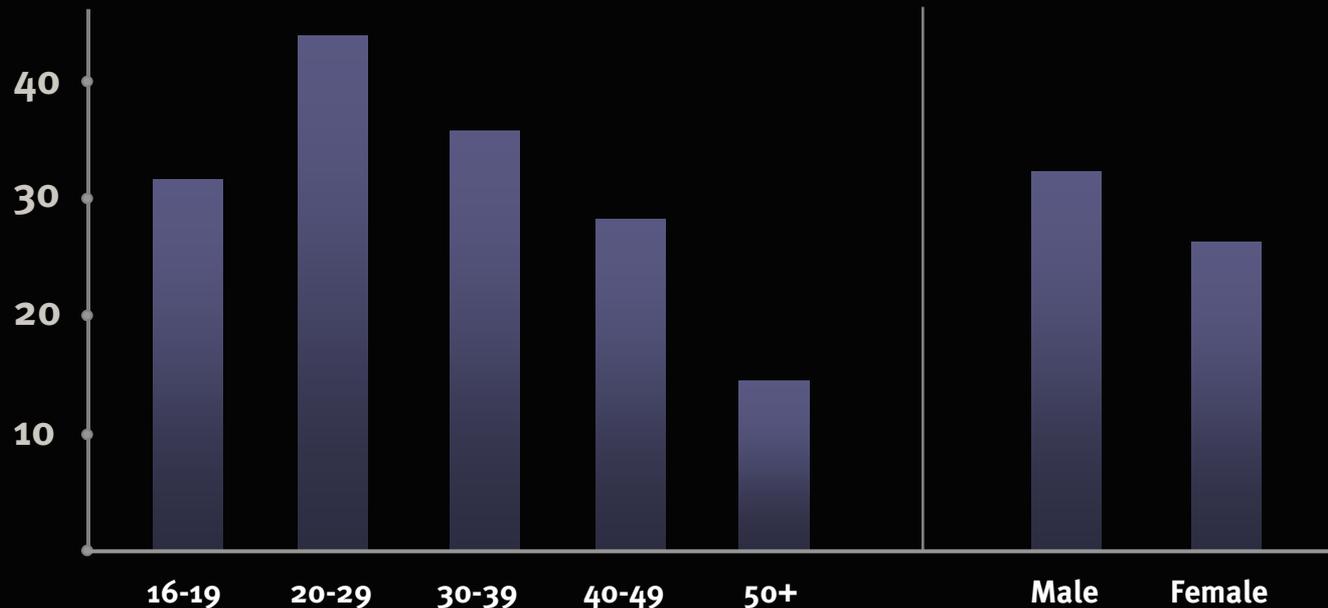


**60% male**  
**46% under 35**  
**38% earn over \$75,000**



*stfu* by RDA

## ... BUT USERS OF ALL AGES ACCESS THE INTERNET ON THEIR PHONE



**Question: Do you access the Internet on your mobile device? (answer “yes”)**

(Base: U.S. mobile users ages 16+, n=1,001)

Source: iCrossing | How America Searches: Mobile | April 2007

# THE MOBILE WEB IS PURPOSE-DRIVEN



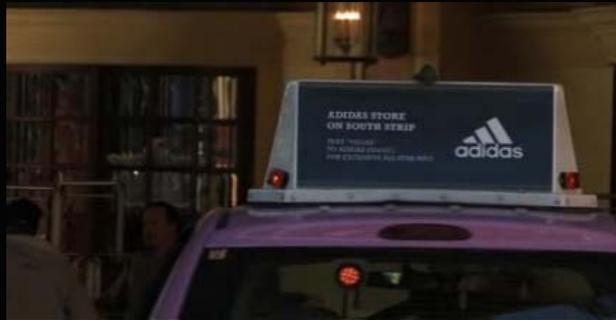
Major behavioral difference with the Computer Web

# THE MESSAGING NEEDS TO BE IMMEDIATE AND CONVENIENT



# THE SELL PHONE REVOLUTION

ADIDAS SPORT PERFORMANCE'S LAS VEGAS STORE | NBA ALL STAR WEEK 2007



# BLUETOOTH

SECTION 5-3

# BLUETOOTH



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**Short range (33 feet) wireless technology**

# ASB BANK | PAGO'S DIGITAL WALLETS

PROMO GRAND PRIX CANNES 2007



**Cash Spot.**  
Come closer, you could win pago cash.

With pago you can now send digital cash mobile to mobile.  
Get started right here. We'll send a pago message directly to your mobile, and you could win pago cash.

1. Activate your infrared or Bluetooth and change your settings to 'Visible', 'Shown To All' or 'Find Me'.



2. Point your infrared port at the circle above and wait to accept the pago message.

**Detailed Instructions**

1. To receive digital cash via Bluetooth you must be in range of the sender's mobile. Bluetooth is available on many mobile phones. To receive digital cash via infrared you must be in range of the sender's mobile. Infrared is available on many mobile phones. To receive digital cash via NFC you must be in range of the sender's mobile. NFC is available on many mobile phones.

2. To receive digital cash via Bluetooth you must be in range of the sender's mobile. Bluetooth is available on many mobile phones. To receive digital cash via infrared you must be in range of the sender's mobile. Infrared is available on many mobile phones. To receive digital cash via NFC you must be in range of the sender's mobile. NFC is available on many mobile phones.

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**pago**  
pago.co.nz

With pago you can now send digital cash mobile to mobile.

Get started right here. We'll send a pago message directly to your mobile, and you could win pago cash.

1. Activate your infrared or Bluetooth and change your settings to 'Visible', 'Shown To All' or 'Find Me'.



2. Point your infrared port at the circle above and wait to accept the pago message.

# LOCATION-BASED MARKETING

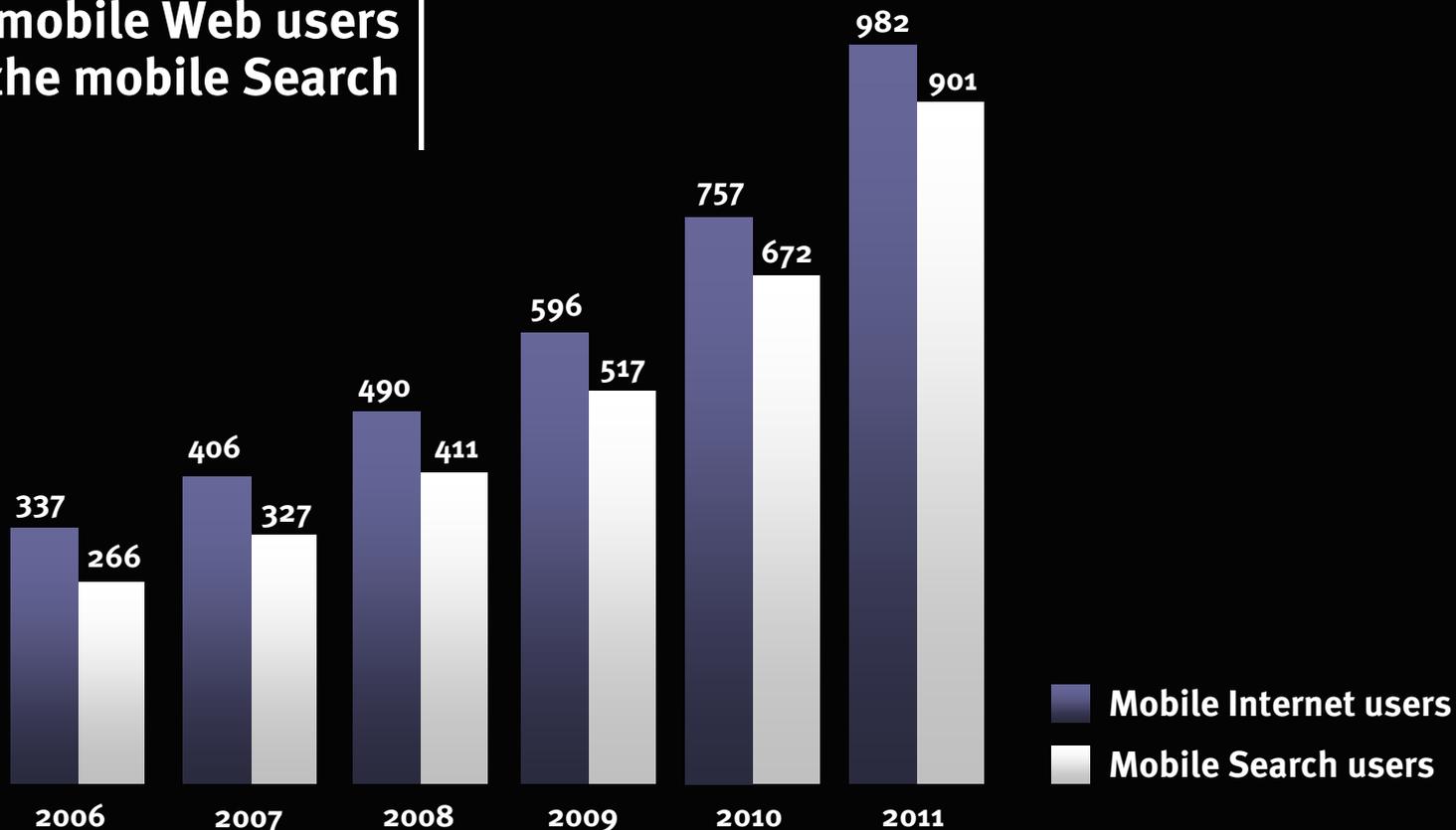
SECTION 5-4



# SEARCH IS THE MOST IMPORTANT CONSUMER NEED IN MOBILE MARKETING



79% of mobile Web users use the mobile Search



## Worldwide Mobile Internet Users and Search Users

(in millions of persons)

Source: eMarketer, July 2007

# PROVIDE A SERVICE RATHER THAN SELL TOO HARD



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Land Rover's iPhone campaign providing directions to the nearest dealer



# HEINEKEN'S BAR GUIDE



# BARCODES

SECTION 5-5

# TWO-DIMENSIONAL BARCODES

DATAMATRIX (DM) CODES | QUICK RESPONSE (QR) CODES | SEMACODES



**Scan QR Code**



**Info on Mobile**

# TWO-DIMENSIONAL BARCODES

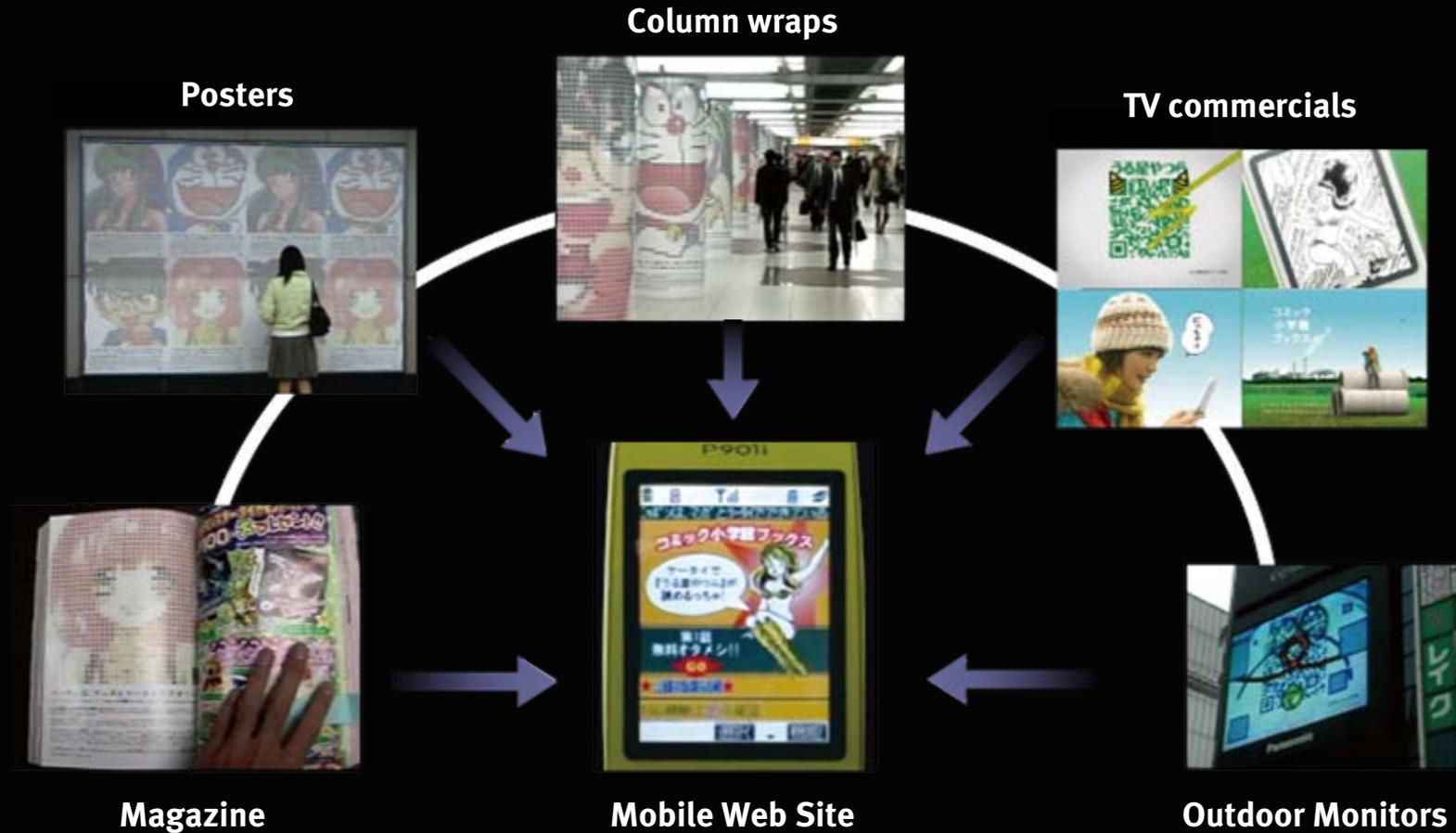
DATAMATRIX (DM) CODES | QUICK RESPONSE (QR) CODES | SEMACODES





# COMIC SHOGAKUKAN BOOKS

PROMO GOLD LION CANNES 2007 + WEBBY AWARDS 2007



AND BEYOND?

SECTION 5-7

**THIS IS NOT THE END...**

THIS  
PRESENTATION  
WAS BROUGHT  
TO YOU BY

*stfu* by RDA

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