

INTO THE new
BREW 2007 CONFERENCE

Mobile Advertising –
Exploring the Possibilities

Panel Background Slides



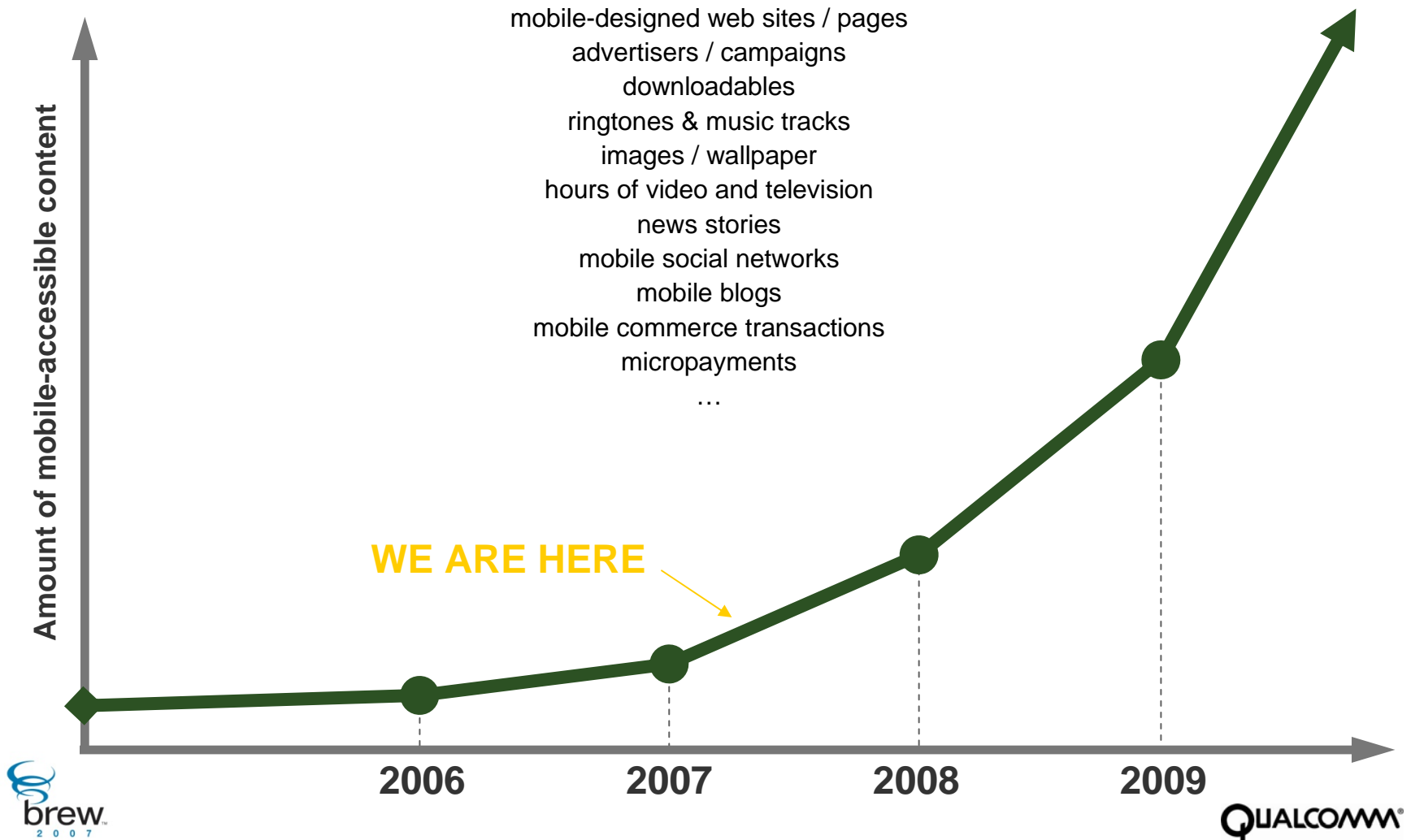


Panelists

- Heidi Lehmann - VP Strategic Development, Third Screen Media
- Jason Spero, VP Marketing, AdMob
- Attilio Somma, VP, VAS Innovation, TIM
- Pankaj Sethi, President - VAS Business Unit, Tata Teleservices- India
- Roger Wood, SVP/GM, Americas, Amobee
- Rich Wong, Partner, Accel Partners

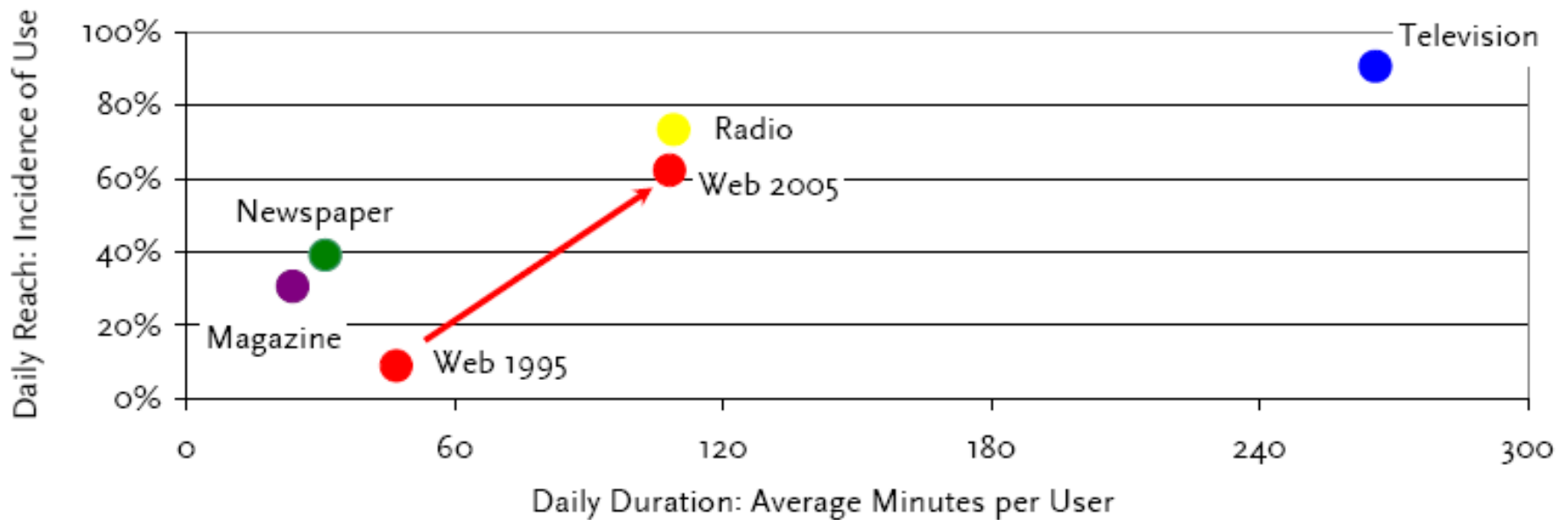
Mobile Content is about to explode

By 2009, millions/billions of _____ will be accessed via mobile



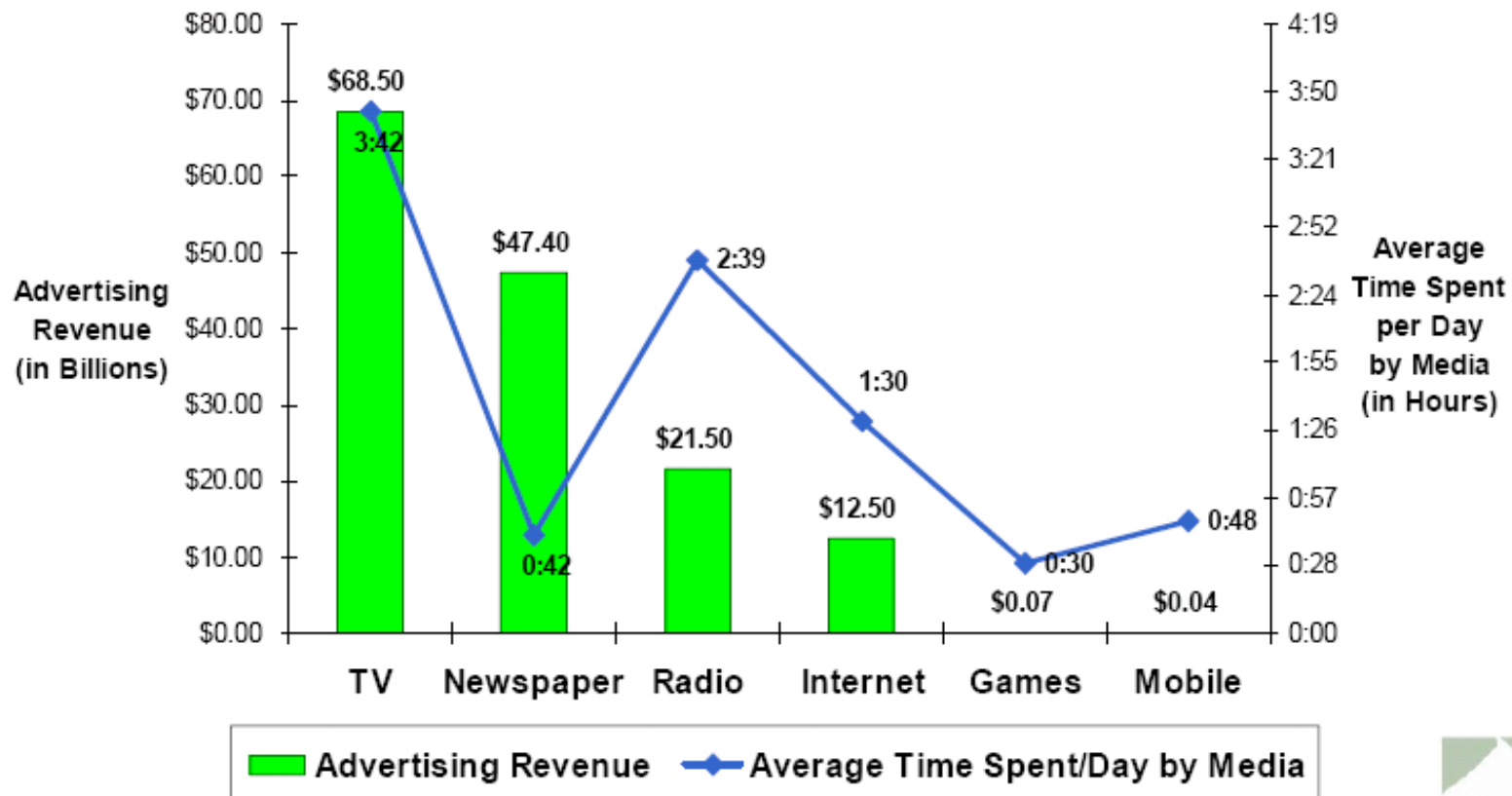
Mobile 2007 is Similar to "Web 1995"

DAILY REACH AND DURATION FOR VARIOUS MEDIA OUTLETS



Source: Ball State University Center for Media Design - A Day in the Life: An Ethnographic Study of Media Consumption

Emergence of Mobile Advertising



Mobile Advertising Opportunity (NA)

US TV Ad Market

(broadcast, syndicated and cable)

- 280 million viewers (Nielsen)
- \$73 billion (IAB)

US Internet Ad Market

- 203 million users (Nielsen)
- \$16 billion (IAB)

US Mobile Ad Market

- 204 million subscribers (CTIA)
- \$100 million (WSJ)

- Informa projects mobile advertising at \$11.35 billion by 2011

Worldwide Mobile Advertising Spending, 2006, 2007 & 2011 (billions)

2006	\$0.87
2007	\$1.50
2011	\$11.35

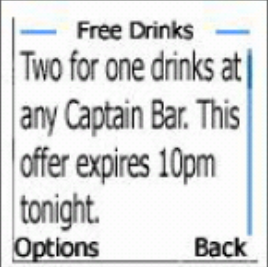
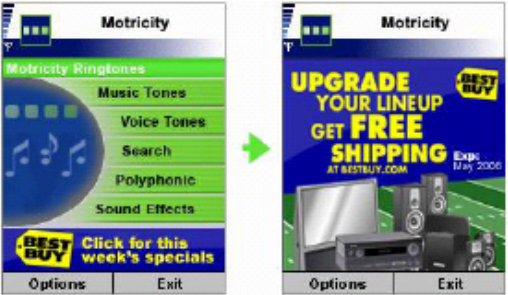
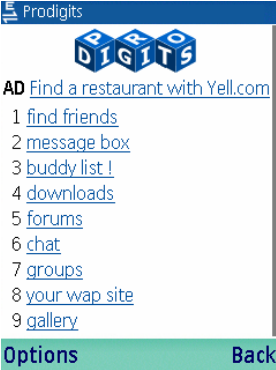
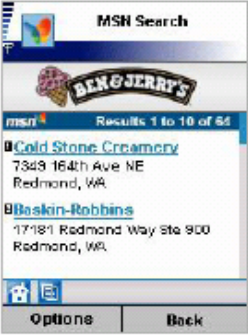
Source: Informa Telecoms & Media, September 2006; Reuters, September 2006

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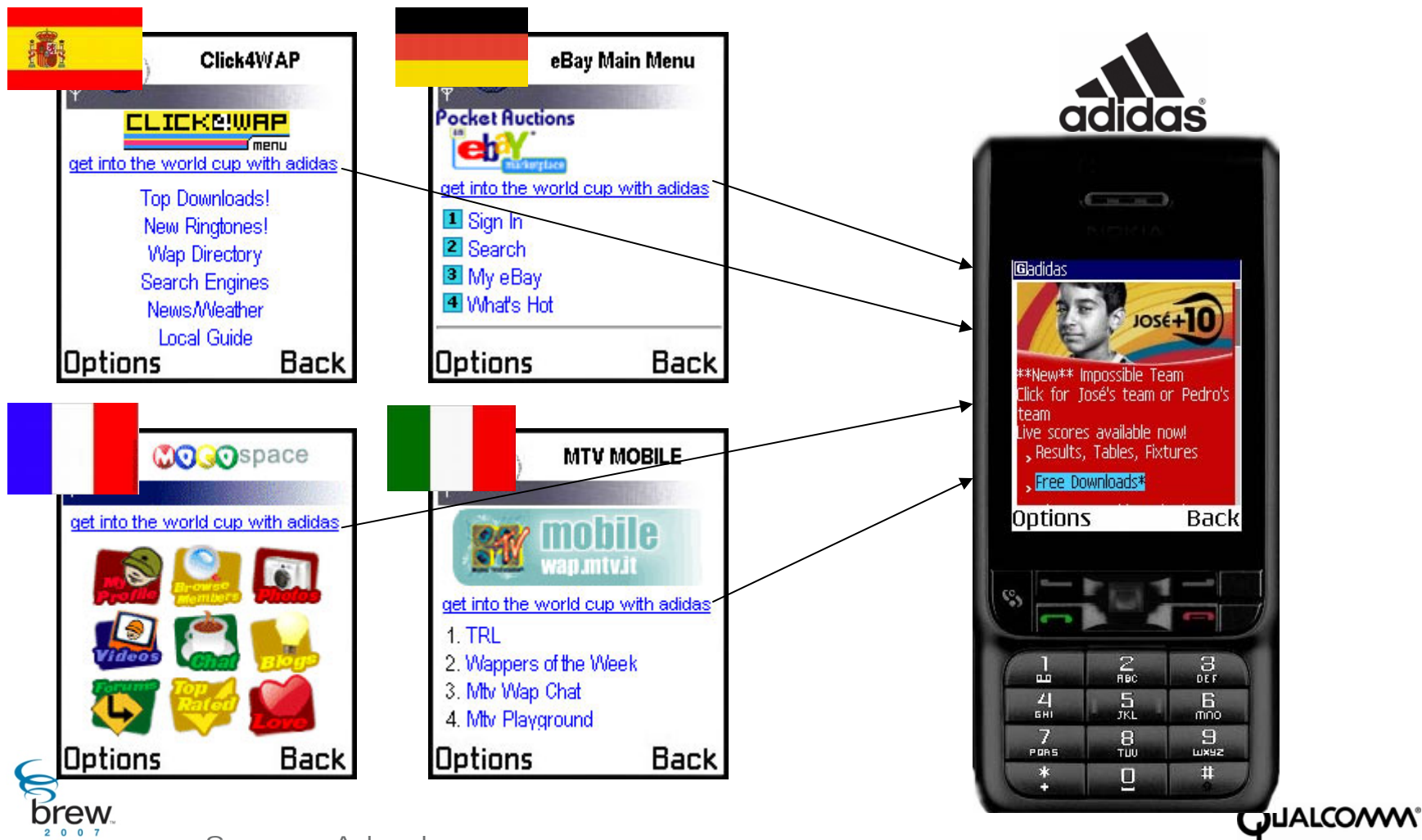
www.eMarketer.com

Source: Medio

Mobile Advertising Models

<h3>SMS/MMS Campaigns</h3>  <p>Free Drinks Two for one drinks at any Captain Bar. This offer expires 10pm tonight. Options Back</p>	<h3>Banner Advertisements</h3> 
<h3>Text Ads</h3>  <p>Prodigits DIGITS AD Find a restaurant with Yell.com 1 find friends 2 message box 3 buddy list! 4 downloads 5 forums 6 chat 7 groups 8 your wap site 9 gallery Options Back</p>	<h3>Paid Search Results</h3> 

Major Brand Adoption Beginning (Adidas World Cup)

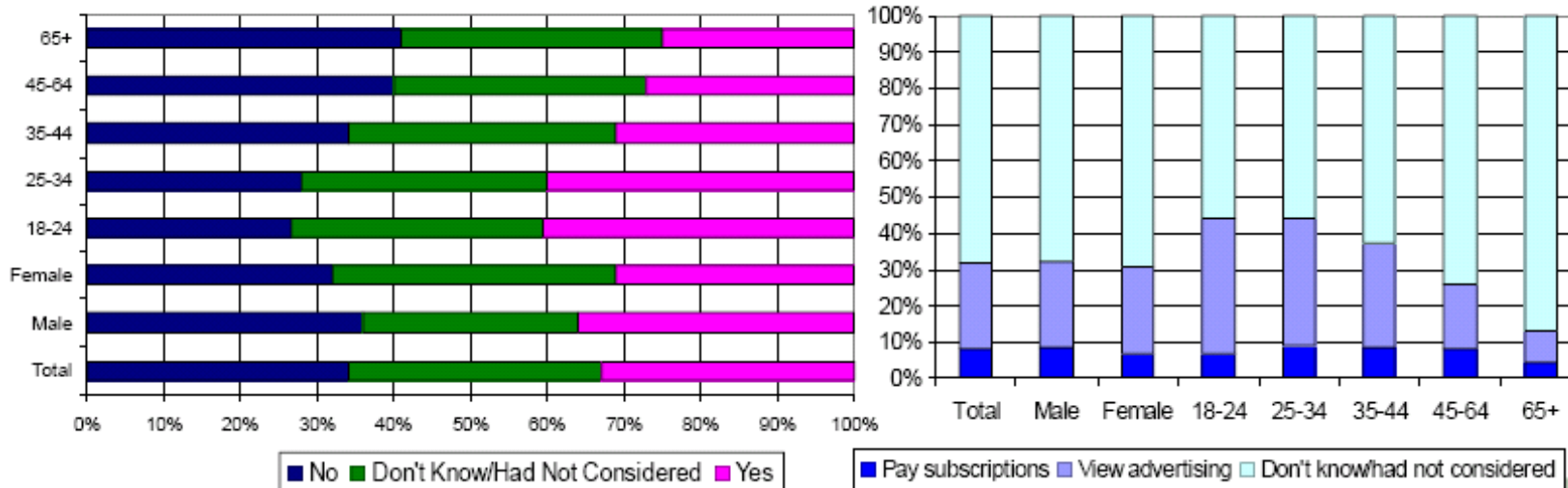


Source: Admob

Consumer Feedback: Ad Support

Would you be willing to access mobile data services at a reduced price if they contained advertising?*

Would you rather pay subscriptions for sports scores, news, weather, and other content you browse on the mobile Internet, or see a banner advertisement and receive the content for free?*



- Up to 40% of users respond “Yes”, and up to 70% respond “Don’t Know or Yes” to ad-subsidy
- Not surprisingly 18-24 and 25-34 youth demographics are most open to ad-supported model