

2008 Spring Technology Trends and Mobile Advertising Reports

Data Tables

2008 Spring Technology Trends

60% of consumers cutting back, 37% no impact and 3% see spending improvements **Page 2**

83% driven by rising gas/fuel cost **Page 3**

Eating out, consumer electronics, and entertainment hardest hit **Page 4**

Cell phones seen as essential (More will cut back on buying gas than their cell phone 51% versus 31%) **Page 5**

Mobile Advertising Research

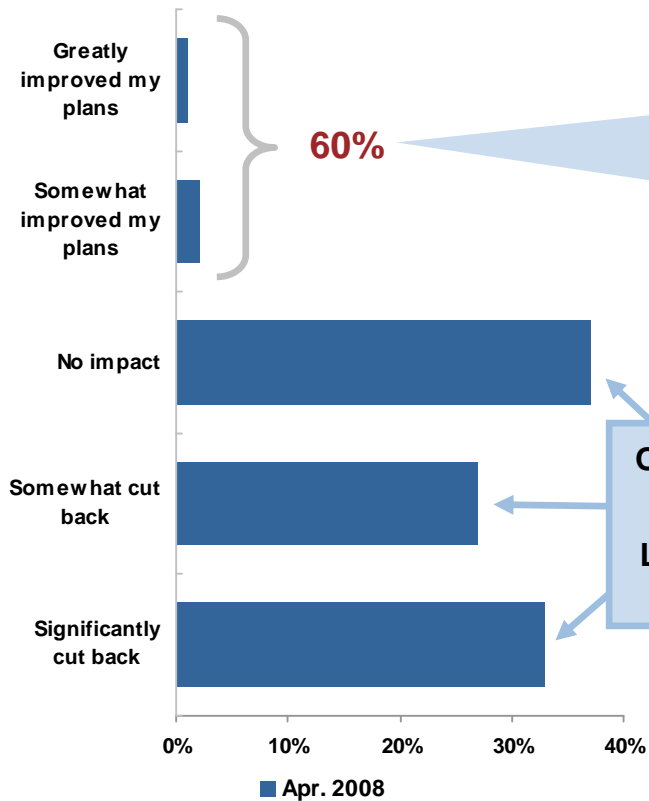
Key messages from consumers on mobile ads **Page 6**

The type of incentives for adults and teenagers – restaurants, entertainment, etc. **Pages 7 & 8**

The best way to approach consumers, text messaging leads the pack **Page 9**

Summary on how best to advertise via mobile **Page 10**

How Do You Spell Recession?



Let's not get hung up with definitions, The fact is 1/3 of consumers will really tighten up on spending due to the economy and another 27% will pull back some as well.

The silver lining in these storm clouds is over 1/3 says the economy will not impact their spending! Do you know who they are?

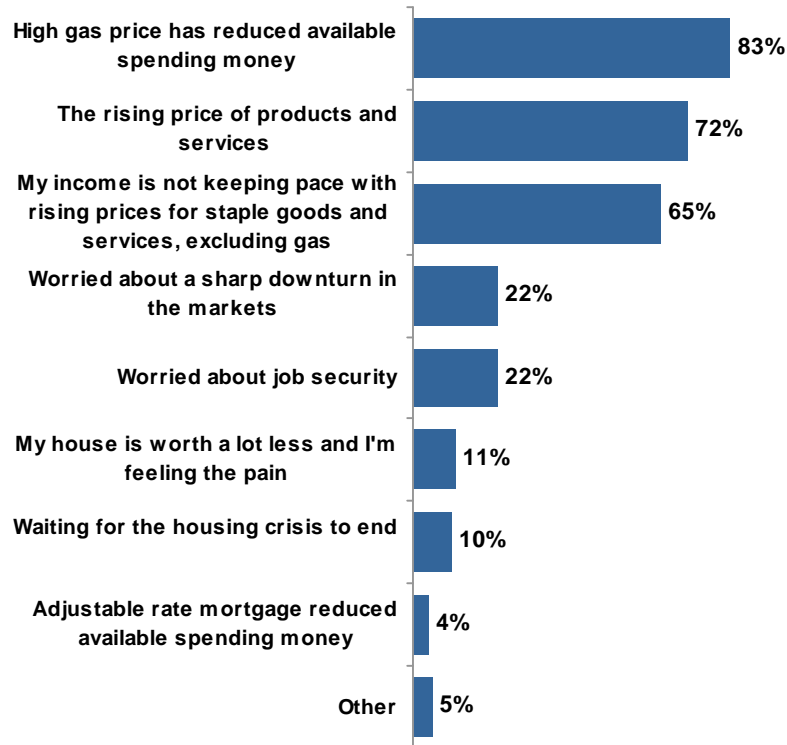
**Opportunities are here:
Let Them Eat Cake**

Women are more likely to cut back than men (64% vs. 55%)

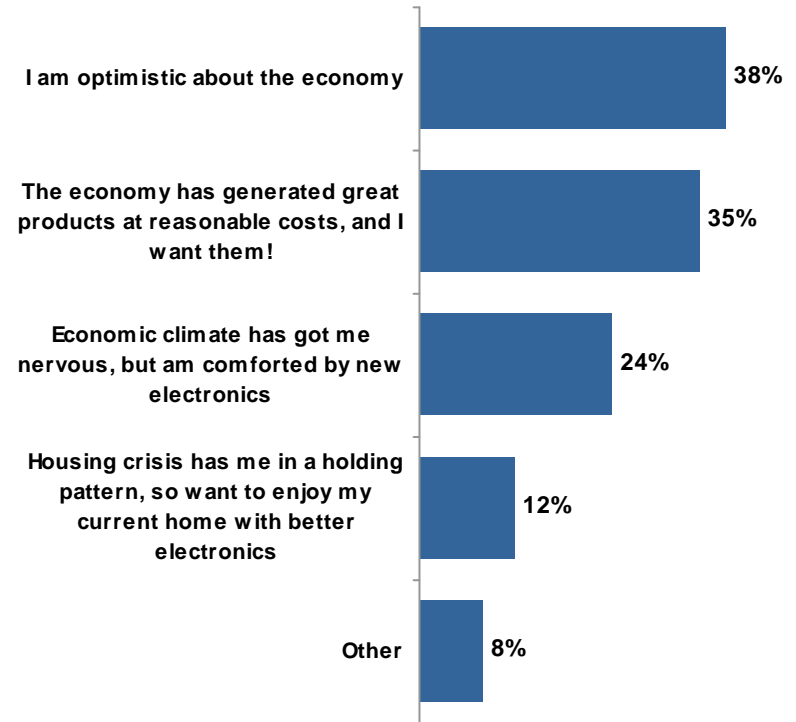
*Q520 In what way has the condition of the overall economy impacted your spending intentions for consumer electronic products? Please select the statement that best describes you.
Base: Qualified Respondents (n=1,006)*

Pain at the Pump Tops the Wall of Worries

Specific Conditions That **Negatively** Impact Purchase Intent



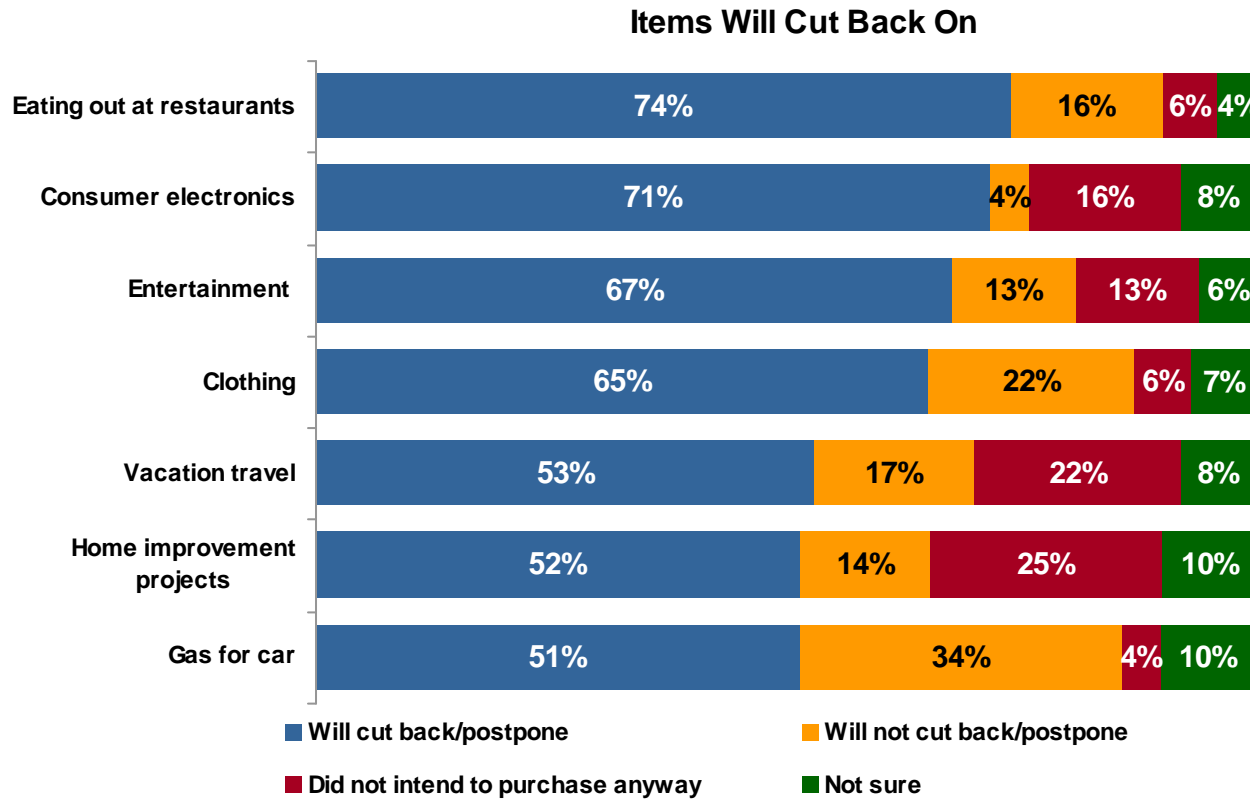
Specific Conditions That **Positively** Impact Purchase Intent



Q530/Q550 What specific economic conditions are negatively/positively impacting your intent to purchase consumer electronics products? Please select all that apply.
Base: Have Had a Negative Impact (n=583)/Positive Impact (n=18*)

*Caution: Low Sample Size

Consumer Electronics and Restaurants Will Get Hit Hard...



Among those who plan to cut back, males are significantly more likely to cut back/postpone consumer electronic purchases in the next 12 months than women (78% vs. 66%).

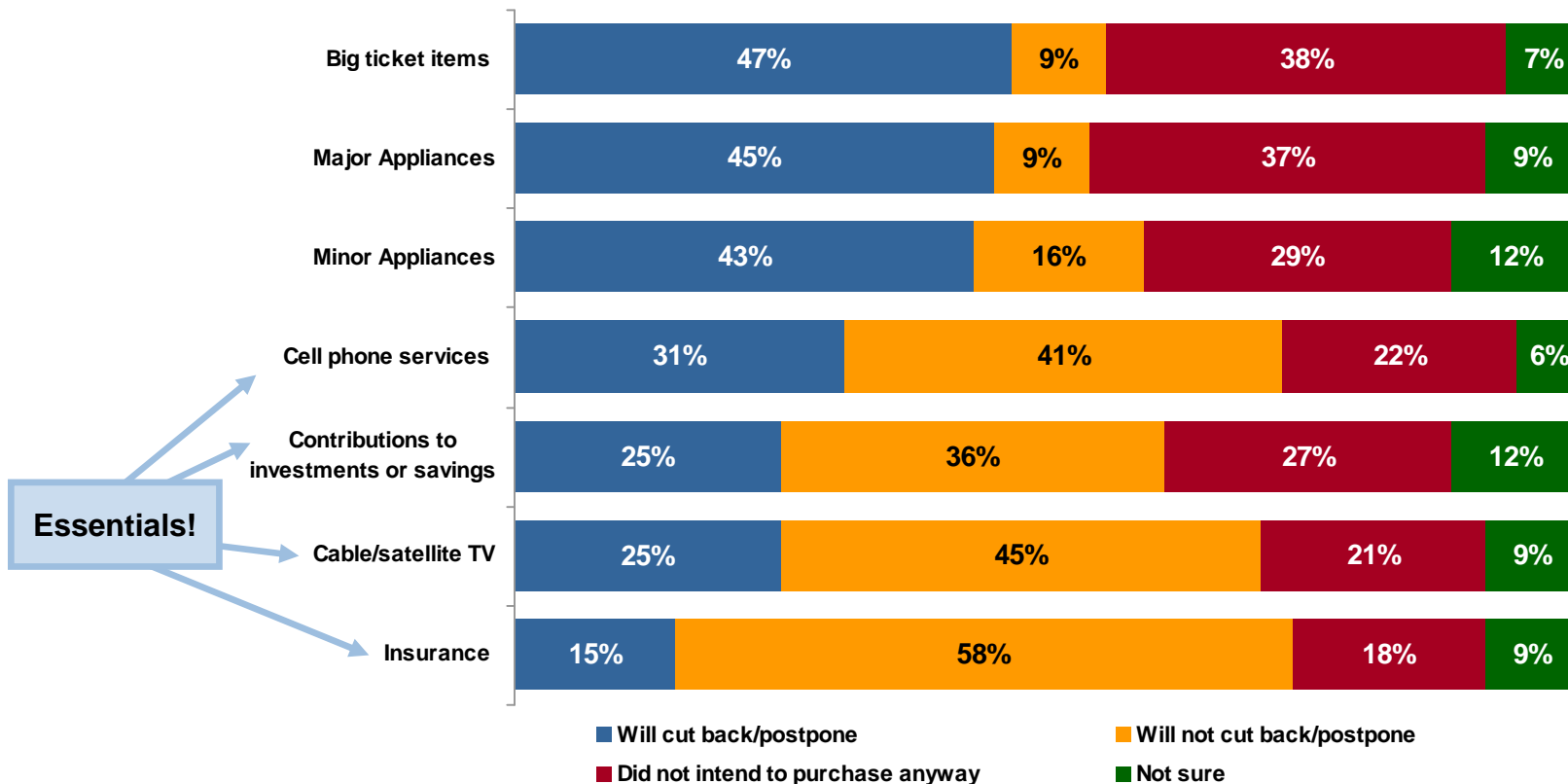
Gas prices generate the pain but consumption will continue

Q541. Please indicate whether you plan to cut back/postpone the purchase of any of the following in the next 12 months.
Base: Economic Conditions Have Had A Negative Impact (n=583)

Some Things... ..You Just Need

(Food, Shelter, Cell Phone and TV)

Items will Cut Back on (Cont.)



Q541. Please indicate whether you plan to cut back/postpone the purchase of any of the following in the next 12 months.
 Base: Economic Conditions Have Had A Negative Impact (n=583)

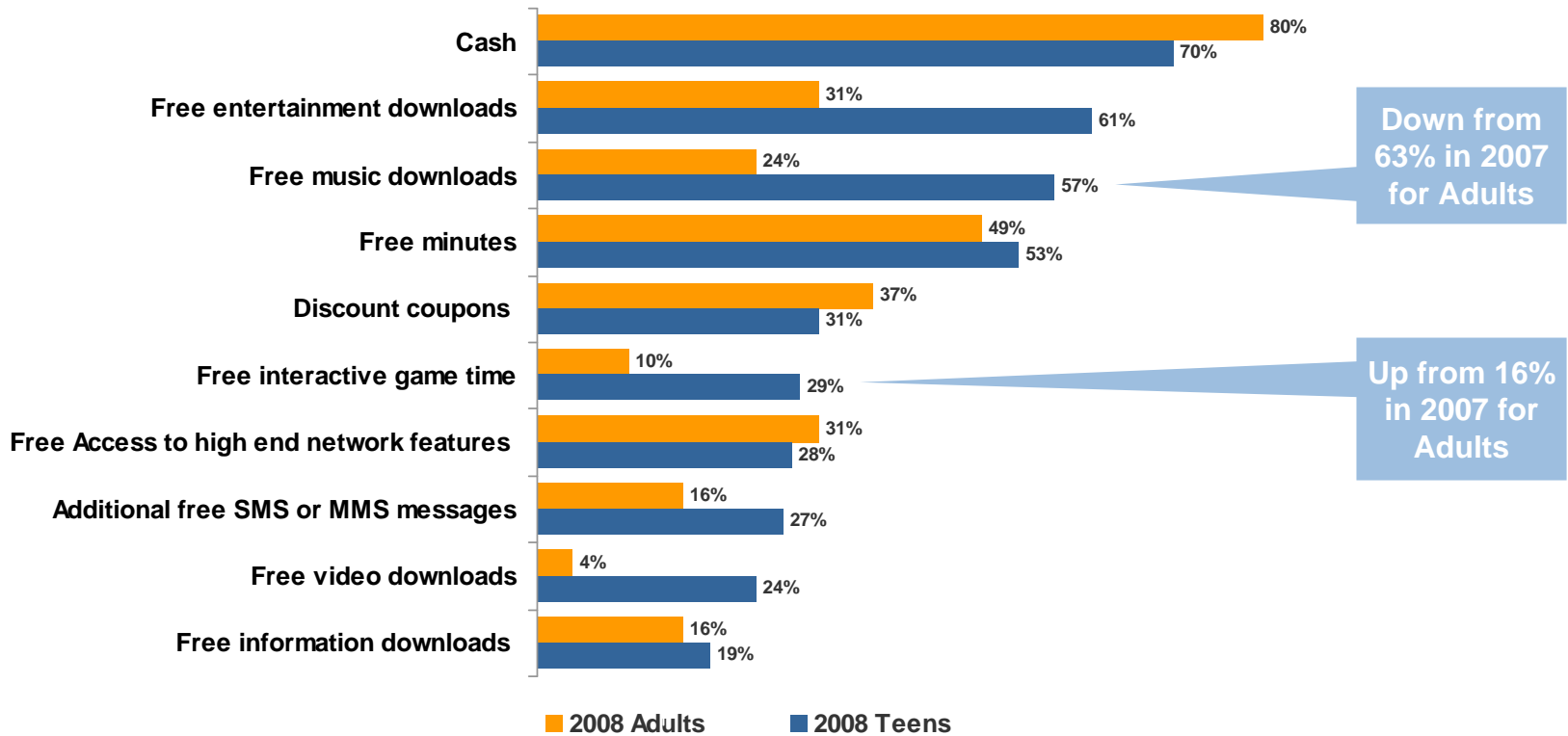
Key Messages from Consumers

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- The basic messages – Success factors for mobile ads:
 - On my own terms,
 - For the right incentive
 - For topics I care about, *and*
 - **Only** if I can change my mind!
- Teens will be a strong early adopter segment, but surprise... don't expect them to provide profiling information!
- Adults are with the program as well.... Opinions tracking well with 2007 results

Many types of Lures will work... (But Teens will bite on nearly everything)

Best Incentives to Receive Ads

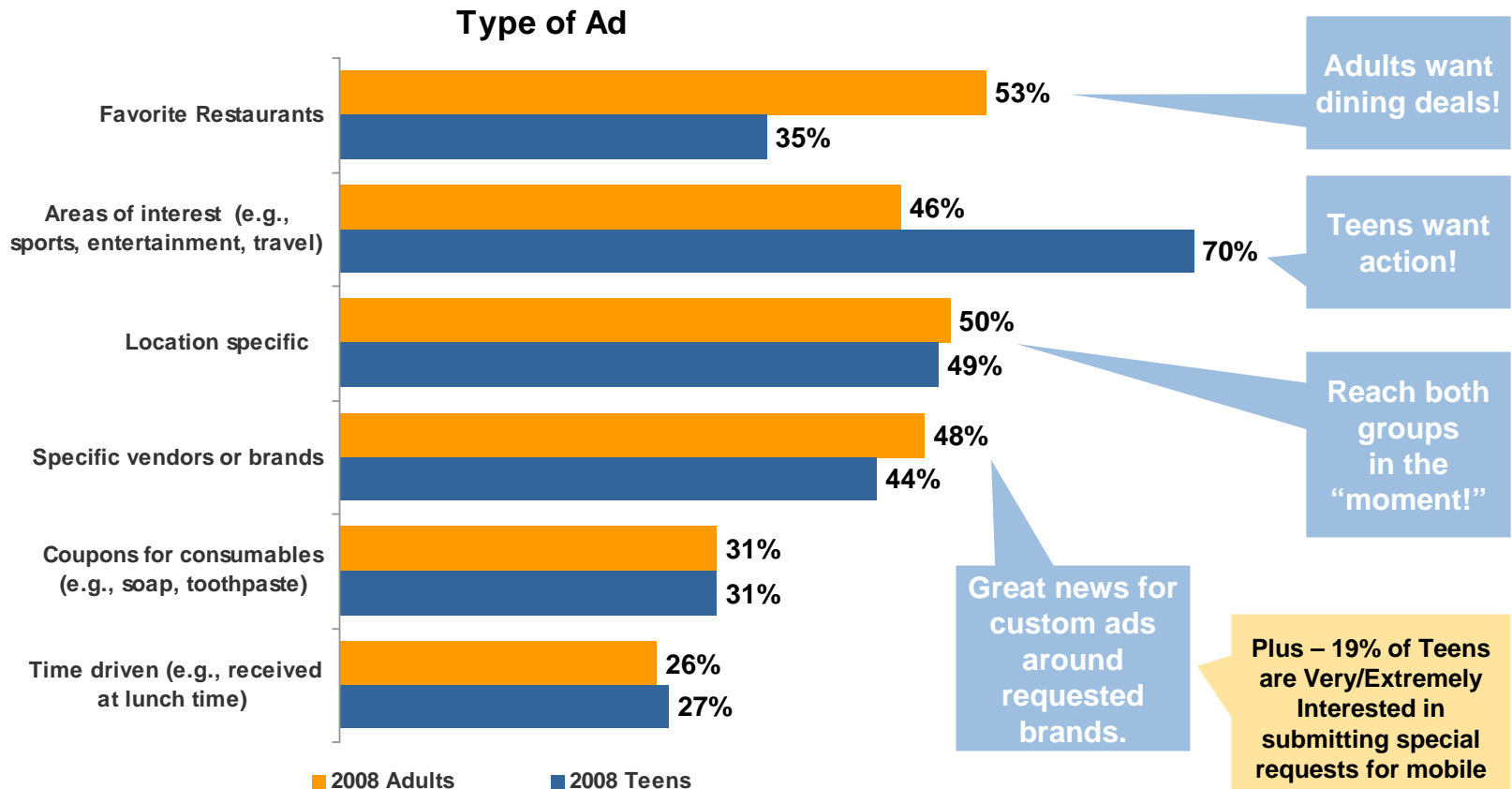


Base: At least somewhat interested to receive ads: Adults – 2008
(n = 415); Adults – 2007 (n=344); Teens (n=130)
Q1520 – What do you perceive to be the best incentives for receiving ads on your cell phone?
Please select all that apply.

Mobile Ads Must Hit the Sweet Spots

Appeal to Real Interests

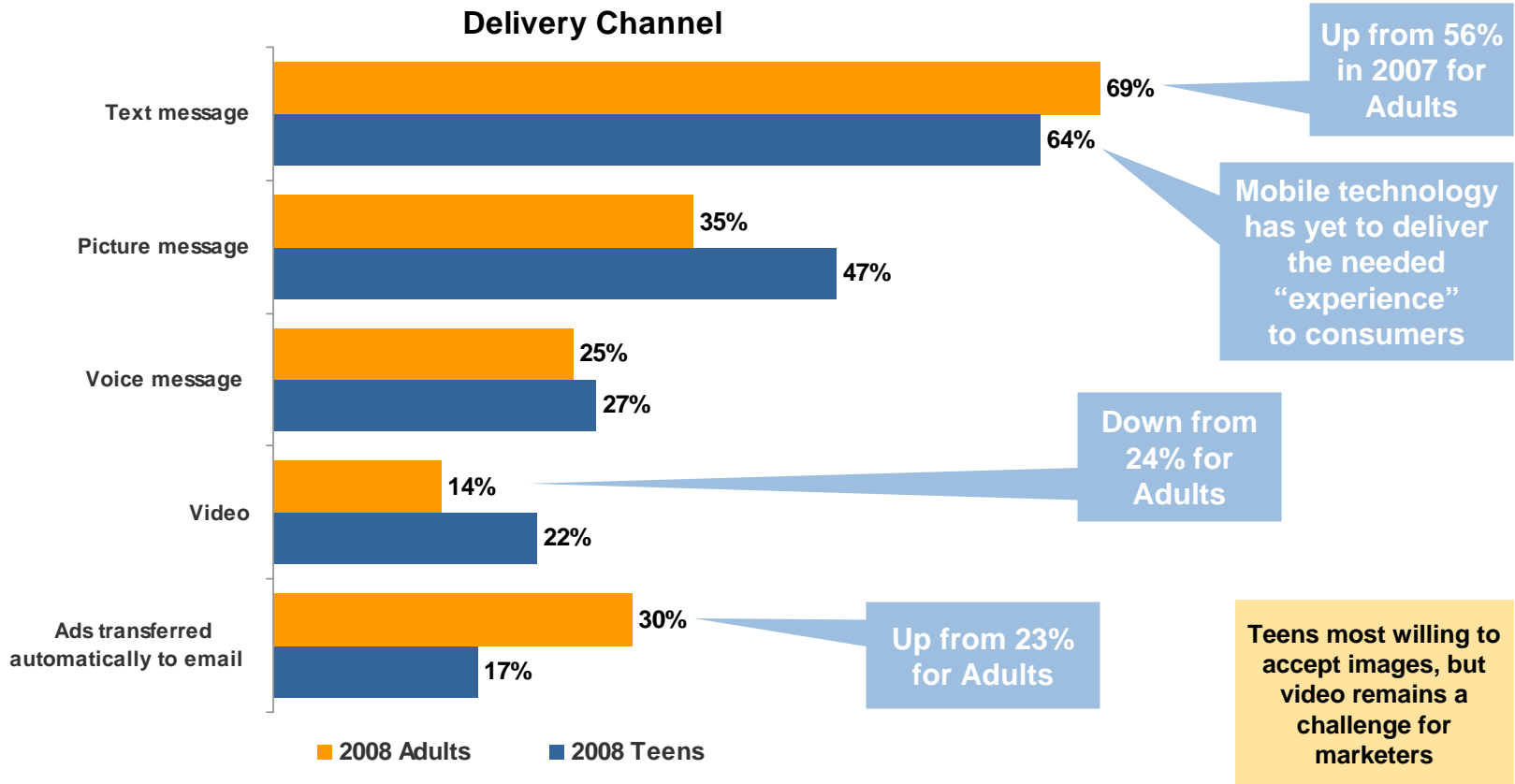
MOBILE
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*Base: At least somewhat interested to receive ads: Adults – 2008 (n = 415); Adults – 2007 (n=344); Teens (n=130)
Q1515 – What kind of advertisements would you like to receive on your cell phone?
Please select all that apply.*

Would you Believe “Text” is Still the Preferred Delivery Method for Mobile Ads?

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*Base: At least somewhat interested to receive ads: Adults – 2008 (n = 415); Adults – 2007 (n=344); Teens (n=130)
Q1530 – In which of the following ways would you like to receive an ad on your cell phone?
Please select all that apply.*

In Summary

- The environment is ripe for the growth of mobile advertising
- Consumers will accept mobile advertising if:
 - There is a pay-off/value proposition
 - The ads are relevant
 - They control what they get and how they are profiled
 - *And they may share and be willing to receive ads*
- Understand the objective of the campaign and how it will work to build the brand integrated with the entire communications strategy
- *Good advertising is good advertising!*