# About this Document

- ★ This document contains a selection of sample pages to provide an understanding of the approach taken in analyzing the topic, and the resulting structure of the report.

- ★ For a full overview of the content of each chapter, please consult the table of contents.

# 21st Century Mobile Marketing

## Global Insights into the World's Most Advanced Mobile Society: Japan

Christopher Billich, Infinita Inc.

April 11, 2008

# Who should read this report, why, and how you will benefit from it

★ **Who should read this report**? Operators, advertisers, media, agencies, handset manufacturers and technical enablers anywhere that are looking for mobile marketing insights and best practices from the world's most advanced mobile society to leverage in their local markets.

★ **Why?** Because *21st Century Mobile Marketing* provides in-depth business intelligence and expert analysis relevant to markets everywhere, including:

- Current and future developments in mobile marketing
- Key enabling technologies and services
- Detailed data on mobile consumer behavior
- Marketer perspective
- Campaign best practice case studies
- Drivers and barriers for mobile marketing
- Interviews with key industry players

★ **Key questions answered in this report**

- How has mobile marketing evolved into a USD 620 million industry in Japan (and again is set to double by 2011), and what lessons does this hold for other markets?
- How are the players in the value chain working together to scale the mobile marketing opportunity?
- How are the traditional players in the advertising industry approaching the mobile channel?
- Which advertising formats have proven successful in the mobile environment?
- Which mobile marketing campaigns are successful, which aren't, and why?
- How will mobile marketing develop in years to come?

# Author and Company Background

- **The Author**: As VP Overseas Business Development at Tokyo-based Infinita Inc., Christopher Billich manages Infinita's market intelligence and research operations, covering the Japanese mobile industry for a wide variety of international and Japanese clients. He is currently focusing mainly on Mobile Social Networking, Mobile Advertising, Mobile Search and NFC applications. Prior to joining Infinita in 2006, Christopher worked as a consultant for online and mobile strategy in the German media and telecommunications industries for 7 years, advising clients like Vodafone D2 Germany, BenQ Mobile and Deutsche Telekom. He holds a masters degree in psychology from University of Cologne and speaks German, English, Japanese and Spanish, sometimes all in one sentence.

- **The Company**: Infinita was founded in 2005. Originally specializing in technical development and production of mobile and cross-platform websites and applications for the domestic market, the company has since expanded its services to deliver market intelligence and research, providing in-depth analysis from one of the world's hotbeds of technological innovation, and conversely bringing international mobile know-how to the Japanese market. Infinita provides its services to a wide variety of clients in Japan and abroad, from industries like telecommunications, media and marketing, as well as at the governmental level.

- **Recent Major Publications**: Japan Mobile Internet Report (September 2007, co-authored and by Wireless Watch Japan), mobagetown Report (June 2007), mixi Report (March 2007). All published by Infinita Inc., available at www.infinita.co.jp/research. Co-distributed by www.wirelesswatch.jp

- **Updates at** www.infinita.co.jp/en.

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# Acknowledgements

★ Publication of this report would not have been possible without the support and contribution of many extremely kind and knowledgeable individuals in the mobile industry. We would like to express our sincere gratitude to:

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- Dennis Hamann, New Market Development Director Asia Pacific at Mobile Marketing Association
- Lawrence Cosh-Ishii, Representative Director at Mobikyo/Wireless Watch Japan, Tokyo
- Philip Sugai, Director, Mobile Consumer Lab and Associate Professor of Marketing at the International University of Japan, Niigata
- Benjamin Joffe, CEO at Plus Eight Star Consulting, Beijing

# Methodology

★ The mobile advertising landscape in Japan is very complex and unlikely to be covered in its entirety. In order to keep this report digestible, we had to omit some details we did not consider essential for ensuring a thorough understanding of the topic at hand.

★ Research on this report started in autumn 2007. For the the production of this report, we have relied on the following techniques and tools:

- First-hand trial and analysis of all major mobile advertising and marketing services
- Online and print media reviews
- Review of mobile advertising media sales materials
- Analysis of key players' financial reports
- Interviews and discussions with industry executives
- Discussions with mobile internet users

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# Japan Mobile Market

## Key Differences

★ Cultural and technological factors - such as "they have such long commutes", "the Japanese do not like to talk on the phone" and "they are crazy about gadgets" - are often cited as the reasons for the great success the mobile internet has become in Japan. However, we argue that while cultural factors do play a minor role, the main differentiating factors that have driven mobile internet adoption in Japan are actually key differences in the business model and power balance within the industry:

1. **No spectrum license costs**: Due to the regulator's stance, operators did not have to spend billions on spectrum licenses and as a result "only" have to recoup their network infrastructure investments.
2. **Competition on network technologies**: Existence of different network technologies in the market pushes vendors and operators to constantly improve efficiency.
3. **Standardization efforts**: Operators, vendors and content providers work together closely in creating open standards rather than proprietary solutions, in anything from messaging to mobile advertising to mobile digital TV and contactless transactions (NFC). This is partly due to the strong position of NTT DoCoMo, which traditionally leads standardization efforts.
4. **Operator/Handset manufacturer power balance**: All handsets are SIM-locked and produced according to the operator's specification. The operator pays the handset manufacturer for handsets ordered up front and markets them through its retail outlets itself, so manufacturers face much less risk in introducing new technologies. The technology roadmap for the whole handset base is developed and controlled by the operator, resulting in a homogeneous hardware base to deliver services across.
5. **Content Provider/Operator revenue share**: For so-called "official sites" (listed on the operator menu) working on a paid subscription model, content providers are paid out an average 90% of revenues, which has created an abundant portfolio of attractive content, resulting in strong consumer adoption.

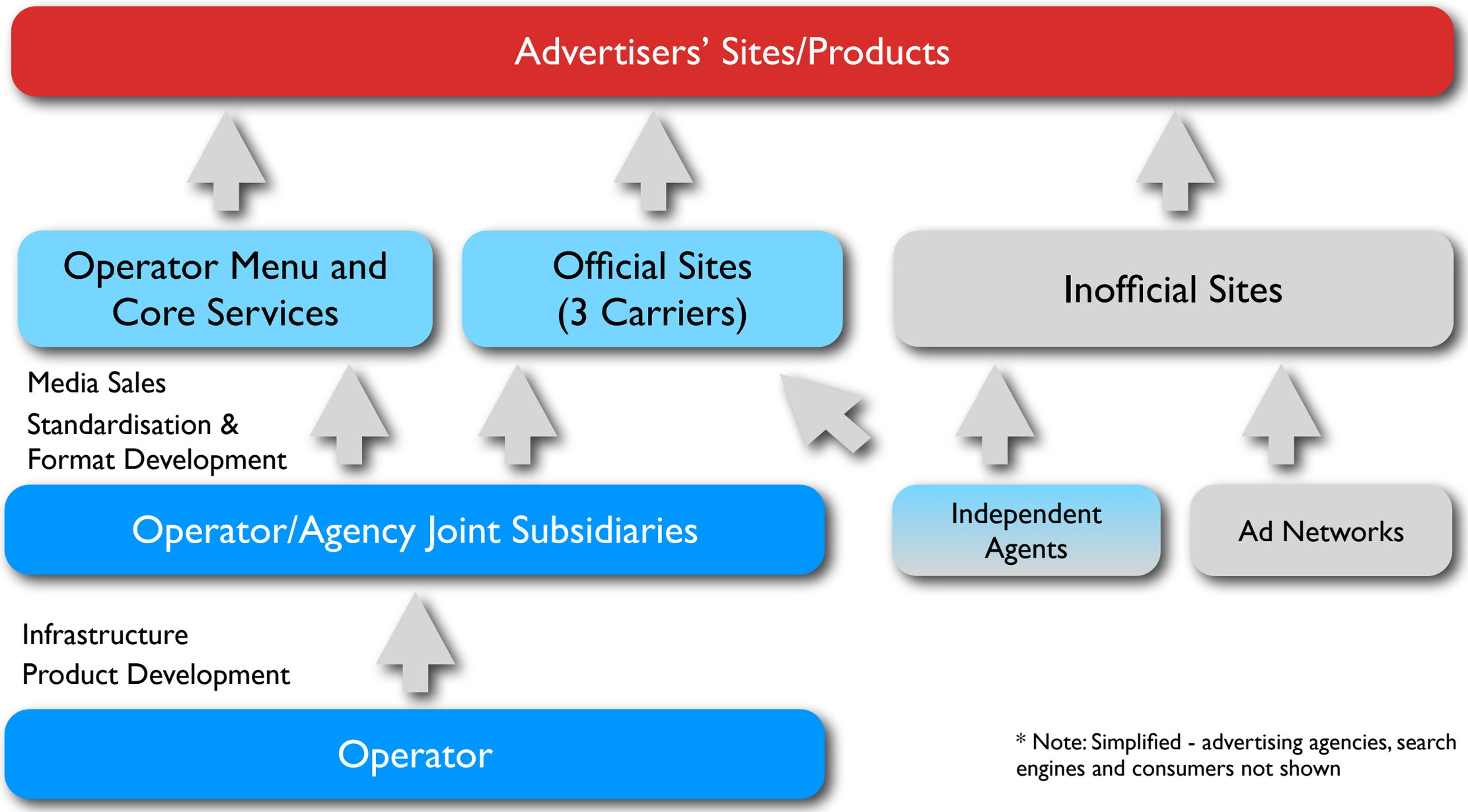
# Japan Mobile Market

## Key Differences

6. **"Open Garden" Approach**: While operators do focus on their portfolio of official sites and some operator-proprietary services, from the very beginning of i-mode in 1999, anyone that wanted to could easily create off-deck mobile sites as well, and consumers could easily access them at the same data access costs as on-deck sites. This trend has accelerated with the widespread adoption of QR codes and mobile search.
7. **Mobile Email as default messaging technology:** While foreign operators have long focused on milking the SMS cash cow, Japanese operators from the start created a system with very cheap mobile messaging. Messaging technology is packet-based mobile email, with every phone having a unique email address. Mobile email is part of the data access fees and has always been so cheap that no mobile phone user worries about related cost. Mobile email has been one of the key drivers in mobile internet adoption and is an integral part of many successful services such as mobile social networking (e.g. new blog entry notifications, posting pictures by mobile email) and mobile advertising (e.g. mobile newsletters). Mobile email is far richer than SMS/MMS, messages can include up to 10,000 characters per message, images, video and emoticons.
8. **Pricing for mobile internet services**: While in the early 2000s data access was not exactly cheap (and still is not), it has always been transparent for the user in the sense that cost was the same wherever he went on the mobile internet. Since the introduction of flat rate data plans in 2004, for most consumers the cost barrier has been completely erased, and services have seen skyrocketing adoption.
9. **Focus on usability**: Usability standards are very high, and because of close industry cooperation in standardization, the user experience is similar on any handset and any carrier. User experience both hardware- and service-side is extremely polished, and ubiquitous coverage with 3G and 3.5G networks ensures it is speedy as well.

# Japan Mobile Advertising Market

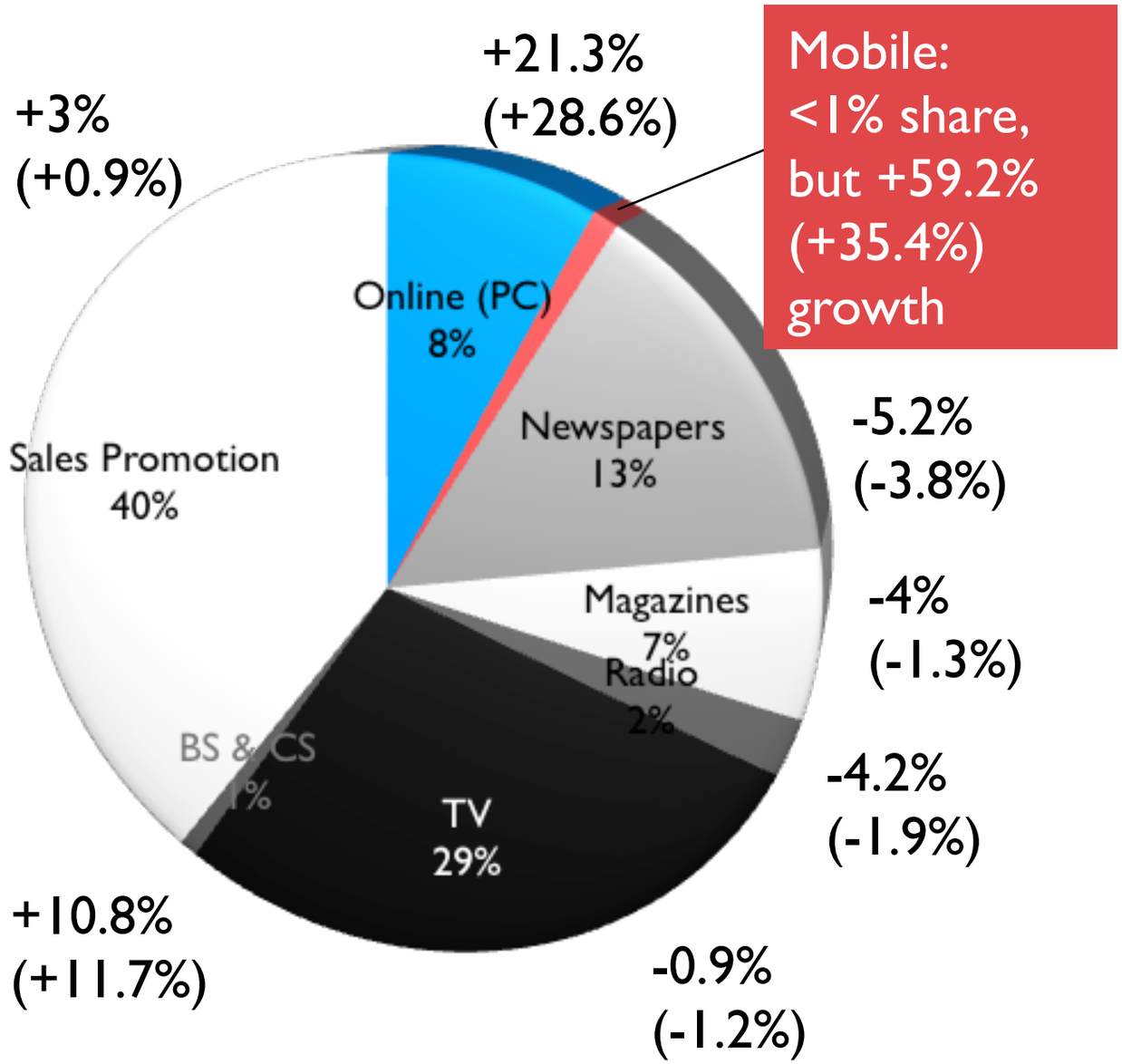
## Value Chain and Ecosystem




* Note: Simplified - advertising agencies, search engines and consumers not shown

# Japan Mobile Advertising Market

## Advertising Expenditures for Major Media 2007 and Year-on-Year Changes 2006 (2005)

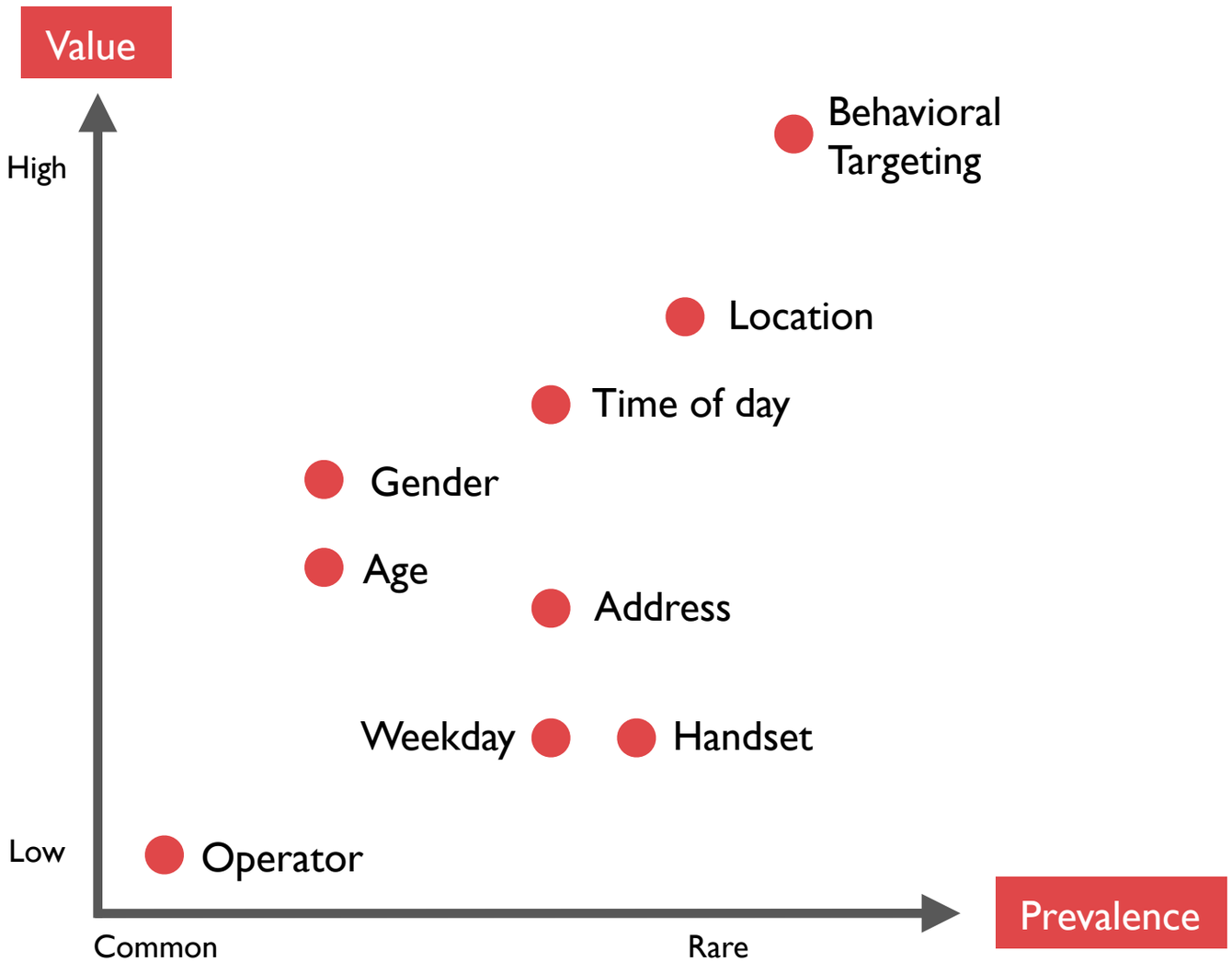



Source: Dentsu Communication Institute (February 2008), Production Costs + Media Spendings

- ★ Overall market growth in advertising is small - total advertising expenditures in Japan were up 1.1% in 2007 compared to 2006 (1.7% from 2005 to 2006). Expenditures in traditional media are down sharply, with especially print media and radio hard-hit.
- ★ Since the beginning of the decade, advertising expenditures in relation to Nominal GDP have been stable, with only slight fluctuations of 1.16% to 1.22%.
- ★ At 0.62 US$ billion, Mobile advertising accounted for less than 1% of total advertising expenditures (US$ 70 billion) in 2007, however, at a year-on-year increase of almost 60%, it is the fastest-growing advertising medium by far.
- ★ 10% of interactive advertising revenues in 2007 were in the mobile segment, up from 8% in 2006.
- ★ The interactive sector overall increased by 24.4% from 2006 to 2007, a slight slowdown after 27.7% growth between 2005 and 2006.
- ★ For the first time ever, in 2007, online advertising expenditures including mobile exceeded combined radio and magazine advertising expenditures.

# Japan Mobile Advertising Market

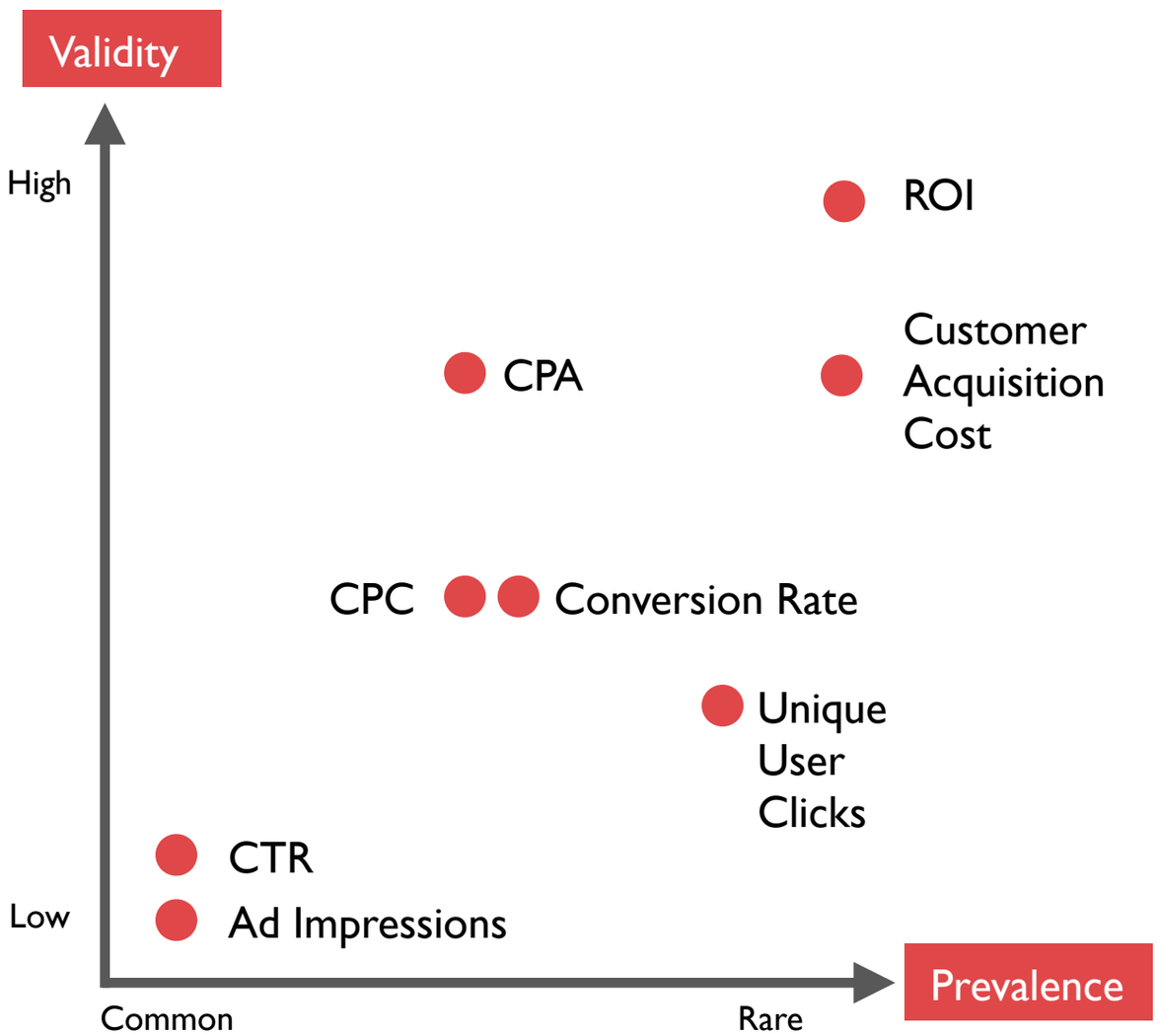
## Targeting




- ★ The most commonly used targeting criteria for mobile advertising in Japan are targeting by mobile network operator, age and gender (the latter two only available for sites/services that require that data to be disclosed on sign-up).
- ★ Less commonly used targeting criteria include time of day, weekdays, location (residence) and handset type. Targeting by location (as in: address) is only possible on sites/services that require sign-up and ask the user to disclose this information.
- ★ So far seldom used and emerging targeting criteria are current location/proximity and external factors such as the current weather. Behavioral targeting approaches taking into account the past usage patterns are still in their experimental stage.

# Japan Mobile Market

## Main Campaign Metrics




| Metric | Definition | Prevalence | Validity |
|---|---|---|---|
| Ad View or Ad Impression (AV) | Gross number of times an ad is delivered (as mobile banner, email ad etc.) during a given timeframe, not taking into account the number of users with multiple exposures | Very common | Very low |
| Click | Total number of clicks on an ad | Very common | Very low |
| Click-through Rate (CTR) | Clicks on ad divided by number of ad impressions delivered, not taking into account the number of users with multiple click-throughs during same timeframe | Very common | Low |
| Conversion Rate (CR) | Percentage of users who take the desired action, e.g. sign up for a site or purchase something as a result of a campaign | Common | Medium |
| Cost-per-click (CPC) | Average cost paid by advertiser per click-through | Common | Medium |
| Cost-per-action (CPA) | Average cost paid by advertiser per conversion (campaign goal), pre-defined as sales, downloads, registrations etc. | Common | High |
| Unique User Clicks (UUC) | Number of individual users who click on an ad during a given timeframe | Rare | Low to medium |
| Customer Acquisition Cost (CAC) | Average cost paid by advertiser per conversion (campaign goal), pre-defined as sales, downloads, registrations etc. for a new (non-returning) customer | Very rare | High |
| Return on Investment (ROI) | Profit generated from total campaign investment | Very rare | Very high |

# Key Enabling Technologies, Content and Services

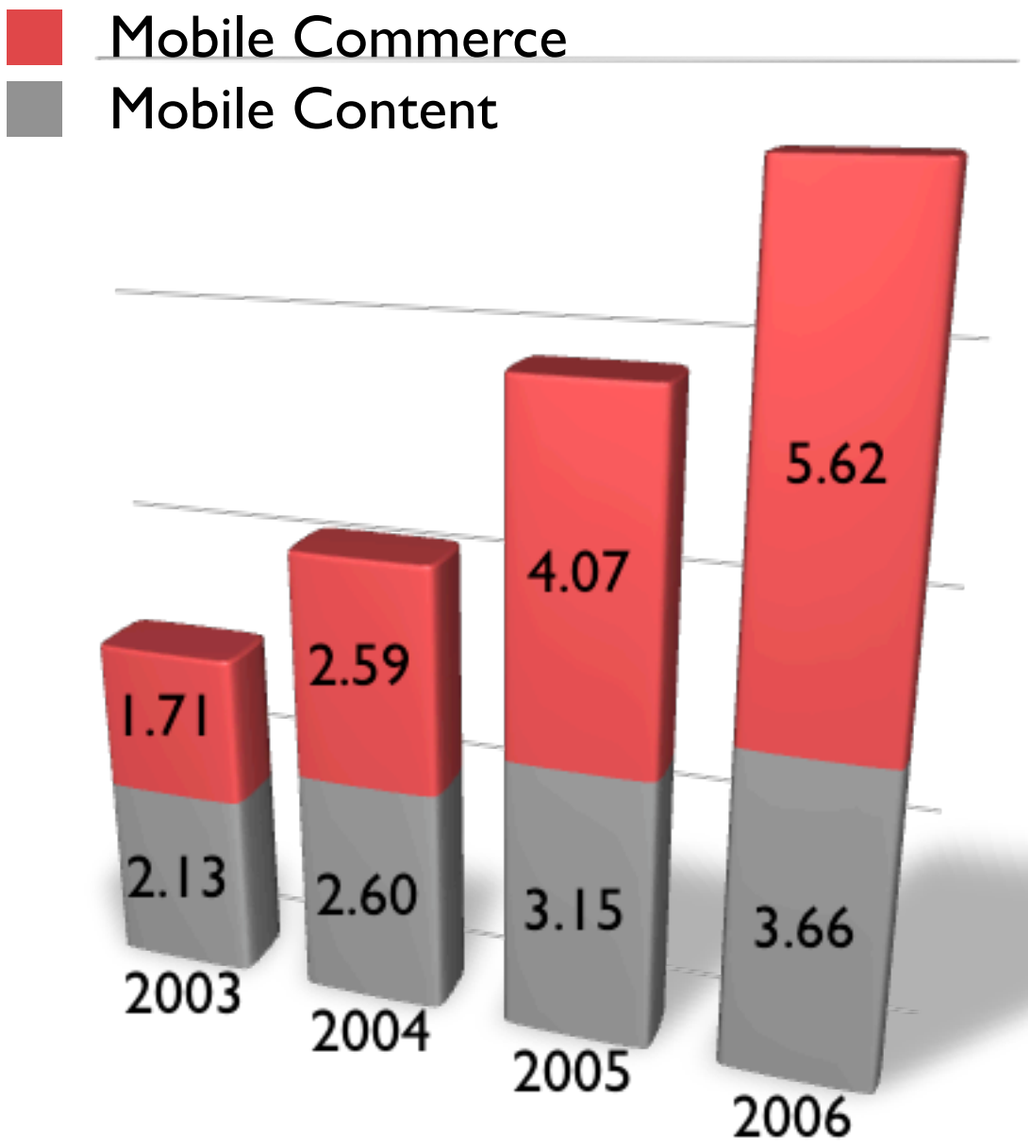
## Mobile Messaging: Email and Decomail


Free (left) and paid subscription (right) Decomail examples
Sources: Decotomo.jp, Disney Mobile

- ★ Exceeding even mobile browsing in popularity is mobile email. Almost a quarter of Japanese mobile users send more than 5 messages a day, and more than 10% send more than 10 (Source: Impress R&D, 2007). Frequency of mobile emails received is ca. 30% higher, due to group emails, user subscriptions to email newsletters (so-called "mail magazines") and opt-in notifications, e.g. from shopping/ auction sites and social networking services.
- ★ The standard messaging technology is mobile email, which can contain text, links and emoticons inline, and pictures, sound and video as attachments. Cross-platform communication between mobile and PC via email is possible.
- ★ A more sophisticated evolutionary step is Decomail, introduced by DoCoMo in 2004 and since adopted by the other carriers, which allows users to embed animations and graphics directly into the message. Decomail is extremely popular with teenagers and is often used as a type of free content as part of of mobile marketing campaigns and promotions. There are free Decomail sites, like Decotomo.jp, as well as content providers like Disney, which offer branded Decomail content under a subscription model. Decomail is the fastest-growing mobile type of mobile content, along with mobile books and comics.

# Key Enabling Technologies, Content and Services

## Mobile Shopping and Auctions

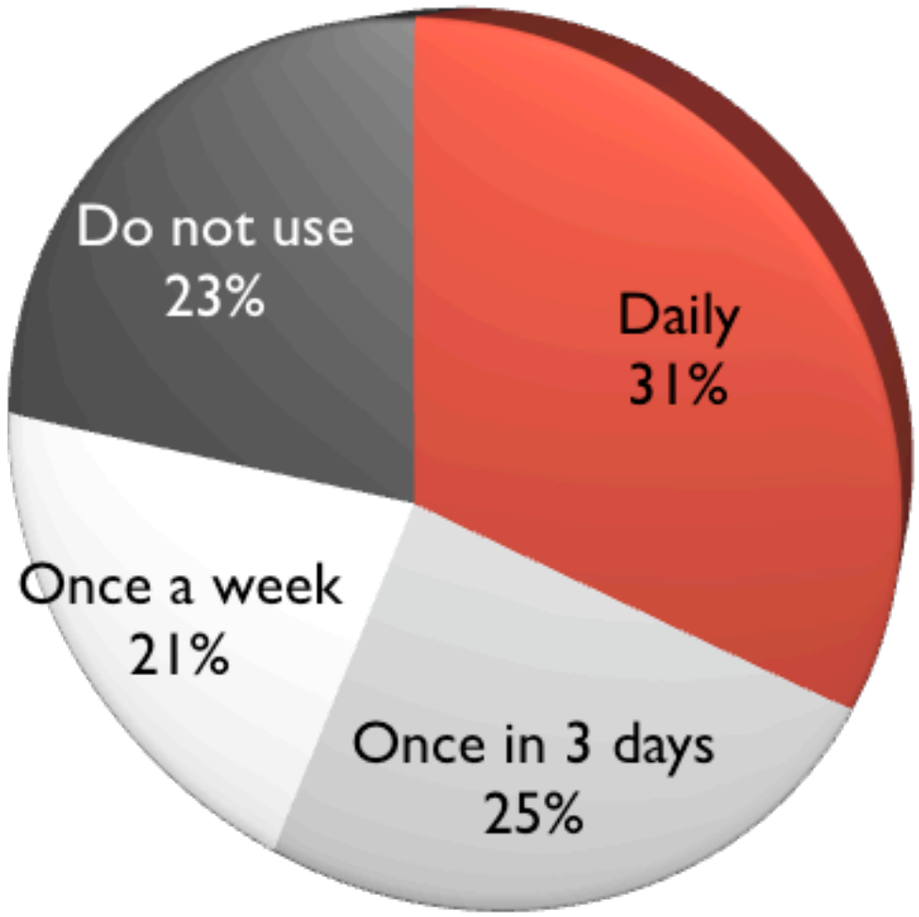



Mobile Content and Commerce Revenues in US$ billion
Source: Mobile Content Forum (July 2007)

- ★ Revenues from mobile shopping and auctions started to outgrew mobile content revenues as early as 2005. The dominant players in this category are Yahoo! Shopping and Auctions and Rakuten, an online shopping site aggregator which generates 25% of its total sales via mobile.
- ★ NTT DoCoMo has teamed up with Rakuten to provide mobile auctions search directly on the i-menu, while au provides several product vertical mobile shopping sites with different partners. SoftBank offers tight integration with Yahoo! Shopping and Auctions.
- ★ 36.2% of Japanese mobile users use their mobile to make purchases online, 21.5% participate in auctions. 14.8% of mobile shoppers do so 5-9 times a year, and almost 1/6 once a month or more. The average yearly amount spent on mobile purchases by shoppers exceeds US$300, which is equivalent to almost half of voice and data aggregate ARPU (Source: Impress R&D, 2007).
- ★ The rise of mobile shopping and commerce has contributed to the growth of mobile advertising in a major way, as online retailers make use of tools like mobile email newsletters, advertising in third-party mail magazines, banner ads, search ads, affiliate programs and many other forms of mobile advertising to generate traffic and push sales.

# Key Enabling Technologies, Content and Services

## Mobile Search

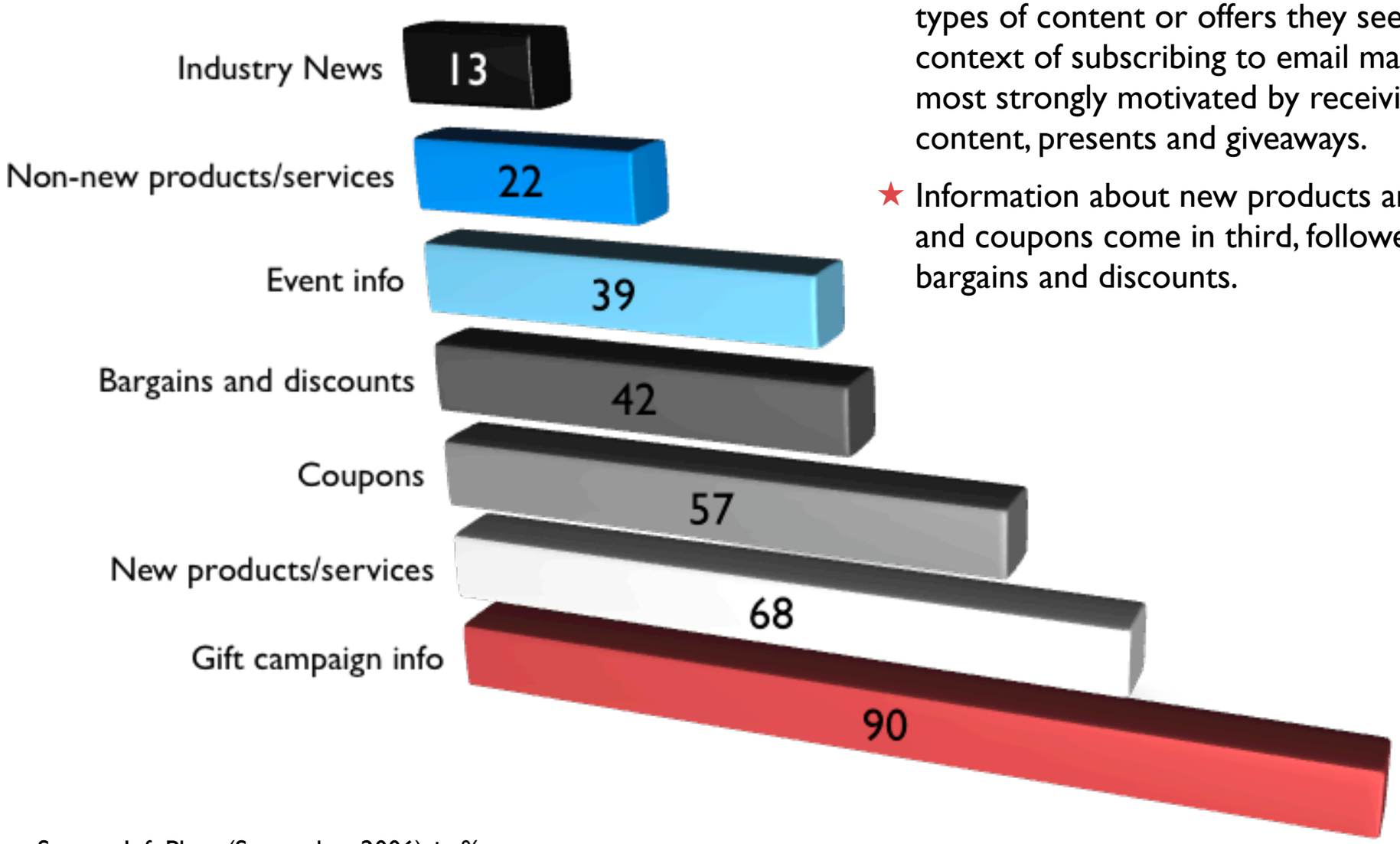



Adoption of Mobile Search
Source: Mobile Marketing Data Laboratory (October 2007)

- ★ Few technologies have changed the mobile advertising landscape, and the Japanese mobile industry as a whole, in as dramatic a way as mobile search. Until 2006, carrier menu search only returned search results from official sites, but au KDDI changed this model with the integration of Google on its EZweb portal in the summer of 2006, opening up the mobile web. SoftBank mobile followed suit with Yahoo!, and DoCoMo with Google integration on the i-menu.
- ★ Almost a third of Japanese mobile internet users use mobile search daily, only less than a quarter have not adopted the technology yet (Source: MMD, 2007). 57.8% mainly use the official carrier menu to find content and services, but 40.5% resort to mobile search engines (Source: Impress R&D, 2007).
- ★ This has triggered not only a boom in off-portal content, but is generating healthy revenues from search-related mobile advertising, both for search queries on the carrier menu and on standalone mobile search sites.
- ★ Until late 2007, Yahoo! and Google had roughly equal market share in mobile search, but with the integration of Google on i-mode and au EZweb, the balance is shifting in its favor.

# Consumer Attitudes to Mobile Marketing

## Favorite Content in Mail Magazines

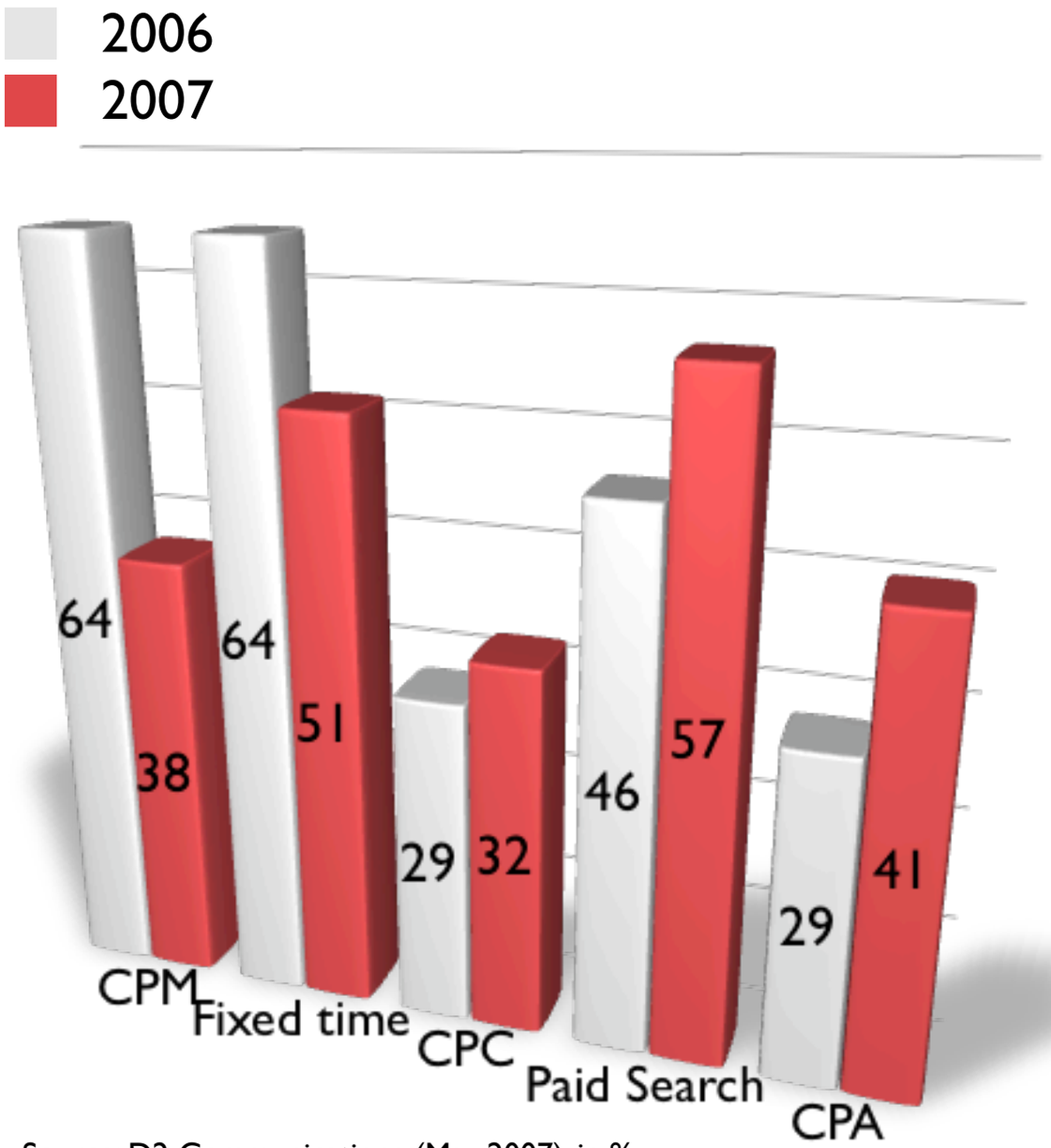



Source: InfoPlant (September 2006), in %

- ★ Participation in mobile campaigns featured in mobile email magazines is strongly incentive-driven. Asked about what types of content or offers they see as valuable in the context of subscribing to email magazines, users say they are most strongly motivated by receiving information about free content, presents and giveaways.
- ★ Information about new products and services ranks second, and coupons come in third, followed by information about bargains and discounts.

# Marketer Attitudes to Mobile Advertising

## Preferred Compensation Models in Mobile Advertising

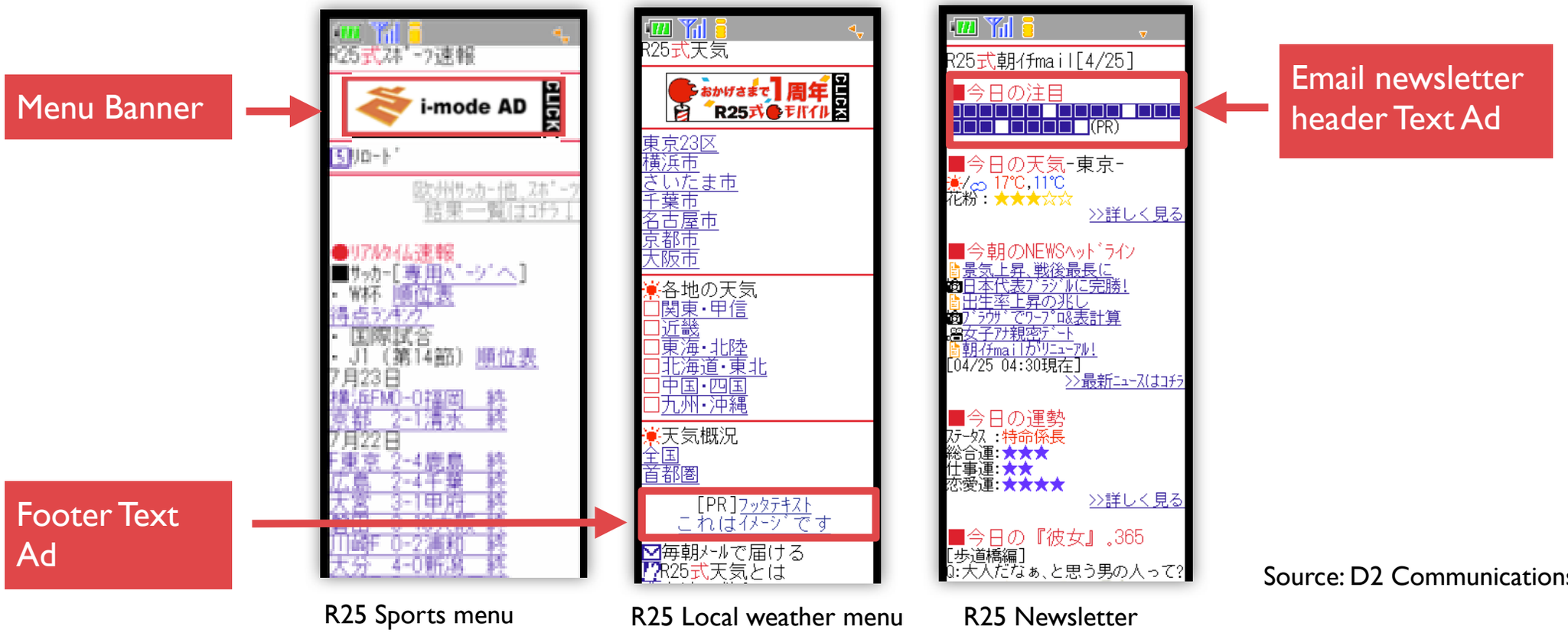



Source: D2 Communications (May 2007), in %

- ★ Until quite recently, most mobile advertising in Japan was billed on a fixed time base (e.g. "One banner on top page for one week), or, more rarely, a combination of time base and guaranteed impression-based compensation (i.e. "One banner on top page for one week, at least 1 million page impressions guarantee").
- ★ Mobile advertisers are starting to favor more performance-based compensation models like cost-per-click (CPC) and cost-per-action (CPA), with the guaranteed impressions (CPM) and fixed-time models losing attractiveness.
- ★ However, CPC and CPA compensation models are still generally only available on paid search advertising, text ad networks and affiliate programs, and, in some very rare cases, on banner advertising.
- ★ Although time-based and impression-based models also have their merit for largely branding-oriented campaigns, the lack of widespread availability of performance-based models for mobile advertising (which, in contrast, is widely available for PC online advertising) may be one reason why advertisers still have not adopted the medium on a large scale.

# Mobile Media and Advertising Formats

## R25 (Third-party)




R25 Sports menu

R25 Local weather menu

R25 Newsletter

Source: D2 Communications

- ★ Menu Banner (GIF 192x53 px, 2 KB), placement on second-level menus available in three time slots, priced at US$ 5,500/week (5-11 h, 11-17 h) and US$ 6,500/week (17-5 h), 2 million impressions each. Alternatively: 24h, US$ 15,000/week at 6 million impressions.
- ★ Footer Text Ad (28 characters plus URL) on second-level menus, US$ 10,000/week at 18 million impressions, or package combined with Footer Text Ad on top page for USD 5,000/week at 22 million impressions
- ★ Email newsletter text ad (24 characters with URL): US$ 3,000 for one-time delivery to 66,000 members, or US$ 20,000 for 7 days package, limited to 1 advertiser per email message

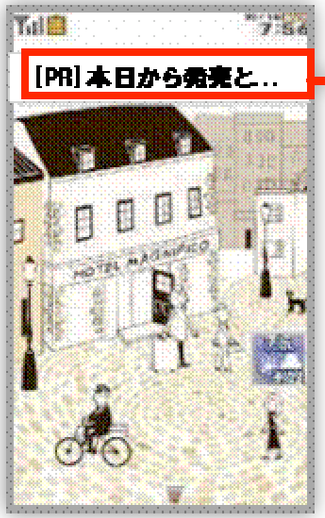
# Mobile Media and Advertising Formats

## EZ News Flash

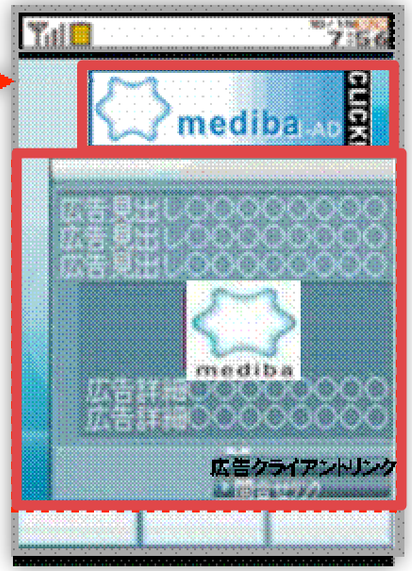

News

Idle Screen with EZ News Flash

Weather




Idle Screen with advertising message in EZ News Flash




Advertising on news page

Top banner

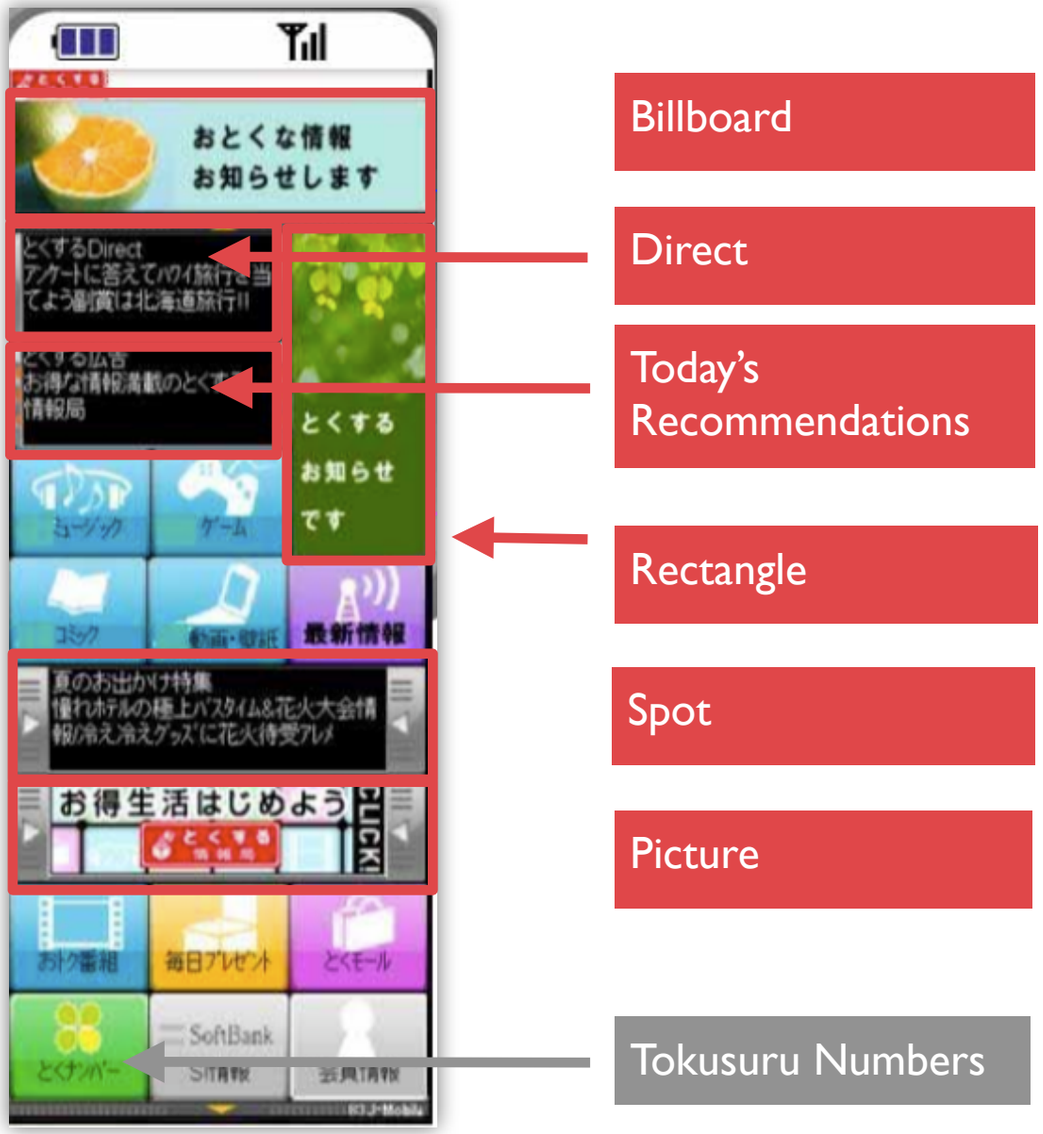
Content Ad

Sources: au KDDI, mediba

- ★ Flash application that provides a customizable feed of news items and advertising on the idle screen, click takes the user to pages providing more information
- ★ Formats
  - Top banner Flash (192 px, 5 KB), rotation (max. 4 during a given week)
  - Content Ad GIF/JPEG (64x48, 5 KB) plus ca. 300 characters text
- ★ Compensation model: time-based
- ★ Pricing: US$ 25,000/week (top banner), US$ 10,000/day (content ad)
- ★ Reach: ca. 9.5 million (top banner), ca. 300,000 (content ad)
- ★ User registration: necessary
- ★ Cost to user: data packets
- ★ Similar products available from DoCoMo (i-Channel) and SoftBank (S! Cast)

# Mobile Media and Advertising Formats

## Tokusuru Menu: SoftBank Mobile Formats




Billboard

Direct

Today's Recommendations

Rectangle

Spot

Picture

Tokusuru Numbers

- ★ USD 10,000/week, PNG or GIF (240x55 px, 5KB), fixed, direct link to advertiser site (or mail to, call to)
- ★ USD 8,000/week, text (31 characters), fixed, direct link to advertiser site (or mail to, call to)
- ★ USD 8,000/week, text (31 characters on main page plus 320 characters on sub-page), rotation (max. 3/week), links to advertiser sites via sub-page with campaign details (not shown here)
- ★ USD 8,000/week, PNG or GIF (78x161 px, 5KB), fixed, link to advertiser site (or mail to, call to)
- ★ USD 8,000/week, text (31 characters), fixed, direct link to advertiser site (or mail to, call to)
- ★ USD 5,000/week, PNG only (192x53 px,), fixed, link to advertiser site, response mechanism: advertiser site link only

- ★ cf. Tokusuru Numbers section

Tokusuru Menu on SoftBank Mobile
Source: J-Mobile

# Mobile Media and Advertising Formats

## G Guide Mobile (Electronic Programming Guide)


Source: D2 Communications

- ★ Formats: Banners (standard & XL), center text ads; rotation every 30 seconds, or user can flip/scroll through ads manually; some handsets: ticker style display with ads
- ★ Response mechanism: web to, mail to, call to
- ★ Compensation Model/Pricing: impression-based, CPM US$ 1-5, depending on format and volume (not dependent on response mechanism)
- ★ Targeting: ZIP code, age, gender, operator, context (ads relevant to programming information currently viewed)
- ★ Marketed by: D2C, mediba, J-Mobile (can be booked for multiple carriers through one agent)
- ★ Future possibilities: behavioral targeting based on past usage, targeting based on TV program metadata

# Mobile Media and Advertising Formats

## mixi: Tie-ups and Promotions


mixi Login Screen Jacks (left) and Tie-up (right)
Source: mixi

- ★ In addition to the standard advertising formats described above, mixi occasionally runs special tie-up campaigns with advertisers, which integrate more deeply with the site.
- ★ Left: So-called "login jack", a fully branded version of the mixi mobile login page (in this case, a tie-up with the Japan Dairy Council, which included a sweepstakes promotion)
- ★ Right: Tie-up campaign with Lawson convenience store chain (featuring Miffy-branded products available to customers redeeming a certain number of Lawson loyalty points), as part of which mixi users could receive free Miffy-branded profile backgrounds for their mixi page.

# Mobile Media and Advertising Formats

## AdLocal


Local search for a restaurant on mobagetown and results page with location-based text advertising from AdLocal network

- ★ Location-based advertising network service provided by Cirius Technologies, Inc. Delivers location-targeted ads to network of more than 20 off-deck sites that offer local search functionality, including mobagetown and popular restaurants listing site Tabelog.
- ★ Advertisers can specify at what proximity (during an address or map-based search) ads should appear
- ★ Formats: Text ads
- ★ Compensation model: cost-per-click, plus one-time setup fee US$ 5
- ★ Pricing: bidding mechanism
- ★ Targeting: genre/product category, time of day, day of the week, area radius (1 to 10 km), weather (e.g. "show my advertising only if it is raining")
- ★ User registration: necessary for usage of some of the services in AdLocal partner network
- ★ Cost of service to user: data packet fees; monthly subscription fee on some partner network sites

# Campaign Examples and Case Studies

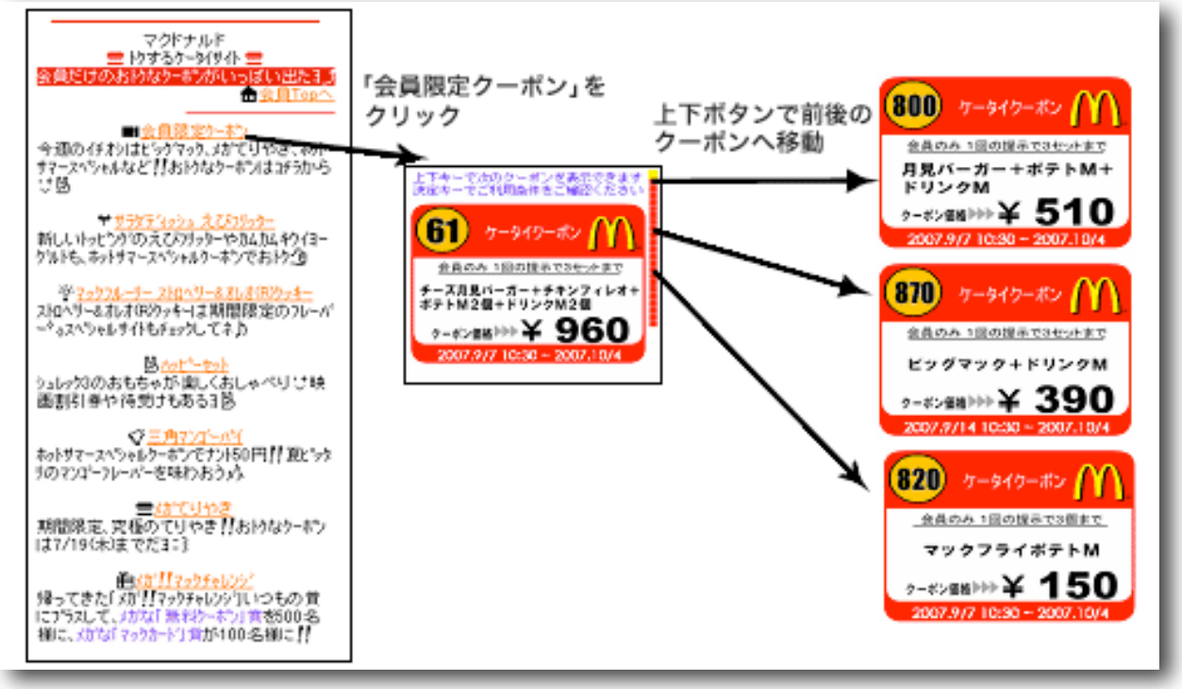
## AXE "Wake-up Service, Inc."


Screencaps from Flash Video on AXE PC Campaign Website

- ★ Advertiser: AXE (Unilever)
- ★ Campaign Date: April 2007
- ★ Campaign Outline
  - Sign up for campaign on AXE mobile site or PC site
  - Set up personalized wake-up call times to mobile via PC website - in the process of this, the relevant model appears on screen as video, simultaneously, the mobile phone rings and the user can hear her "talking to him" and confirming the wake-up call
  - For each wake-up call, collect 1 of 14 wake-up girl Flash wallpapers for your mobile
  - In order to get all girls as wallpapers, including a special "secret character", it is necessary to place at least 14 wake-up call orders
  - (For selected users, by pre-registration): Be woken up by actual campaign girls at Naeba Ski Resort
  - Get free branded mobile application (alarm clock)

# Campaign Examples and Case Studies

## McDonald's Flash Coupons




McDonald's Mobile Site (left) and Flash Coupons (middle, right)
Source: McDonald's

- ★ Advertiser: McDonald's
- ★ Promotion Date: ongoing, since February 2006
- ★ Promotion Outline: Member Site and Flash Coupons
  - Users sign up on the McDonald's mobile website, they can then download Flash coupons, which have several screens with one promotion each, which they can redeem as many times as they want (until offer expires) by showing them at the cash register
  - McDonald's notifies users about new promotions and offers by mobile email, in order to participate, they need to download the relevant new coupon from the site
  - Since coupons are Flash, they can only be stored on the phone, but not forwarded to other handsets by mail, so in order to use them, sign-up is necessary
- ★ Results:
  - More than half a million members by October 2007
  - 20% of children between 12-18 in Japan use the service

# Key Findings

★ By analyzing the detail of and outlook for the Japanese mobile marketing industry in detail, a number of factors impacting market growth - some driving it, some hindering it - emerge. While not all of these may have relevance to markets elsewhere, and relevance of specific factors will vary in a given one, we believe that the following do, in fact, apply universally:

★ **Never be intrusive.** This is almost too obvious a thing to say - but always keep in that the mobile is the most personal medium ever. People do not forgive mistakes easily here. It is a purely opt-in, by invitation of the user-only world.

★ **Only one part of the puzzle.** The mobile channel is still largely treated separately of other marketing efforts. Only when integrated with other media does it unleash its full potential.

★ **Listen to the children.** What they are doing today on mobile turns mainstream tomorrow.

★ **Engage your customers and learn from them.** It's a lot of work, but it pays off.

★ **Create desirable content, not advertising.** Advertising content can be so well-tailored and entertaining that people will go to great lengths to get it. In some cases, they might even pay for it.

★ **Provide ample opportunity for communication.** The best mobile marketing efforts work by creating an environment that fosters communication. Among the audience, and with the brand.

★ **Industry-wide standards are crucial.** Collaboration across the whole value chain is necessary, no matter how conflicting the interests involved.

# Key Findings

- ★ **Think beyond the browser and messaging.** A mobile phone is many things to many people, and depending on context, it can be many things to the same person. It has multiple layers that can be leveraged for marketing.
- ★ **Elaborate and educate.** Agencies and brands did not grow up with this medium, and the possibilities as well as the limitations are not necessarily clear to them. Creating this understanding takes time and effort.
- ★ **Performance increasingly matters.** The hype is coming to an end. Time to talk about the money.
- ★ **Simplify the media-buying process.** Media planning and buying for mobile is still extremely complicated. Advertisers and agencies don't have time to spare.
- ★ **Refine targeting possibilities and metrics.** Mobile marketing will see adoption in line with efficiency improvements made - and how precisely that efficiency can be measured.
- ★ **Walled gardens are over.** People don't like to be locked in. Open up and they will come.
- ★ **Affordable data.** Mobile web access does not necessarily need to be cheap to spark explosive adoption. But it needs to be calculable and transparent for the user.

# 21st Century Mobile Marketing

## Global Insights into the World's Most Advanced Mobile Market

- ★ Author: Christopher Billich, Infinita Inc.
- ★ 188 Pages
- ★ Current version 1.0
- ★ US$ 1,500 (Company-wide License)

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