








Wireless
Advertising
Association



User perception to SMS advertising and SMS services


Industry Overview and MyAlert's findings through a consumer survey

(October 2001)

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Introduction

Over the past three months, MyAlert and The ARC Group have conducted a consumer survey across Europe via e-mail, have analysed key findings from research studies carried out worldwide, have drawn conclusions together with the institutional WAA (Wireless Advertising Association – www.waaglobal.org) members and have exchanged ideas with potential market players.

We have collected very much similar data and have come up with conclusions that help understand consumers point of view with regards to the different SMS services available in the market nowadays.

However, the market is just being created, growing out of the earlier “mobile data “ classification into what is being regarded as m-commerce and m-services today. In such a new marketplace, it is almost impossible to extrapolate long term trends from an early, developmental snapshot.

MyAlert and The ARC Group hope these findings help companies in this market sector so that consumer services and products are better targeted and therefore more accepted in today’s demanding world . A better understanding of our end users / customers will enable us to reach our personal mobile expectations.



MyAlert and Buongiorno company profile

MyAlert has recently merged with Buongiorno.com, creating the largest independent player in Interactive and Mobile Services (IMS) worldwide.

This merger represents one of the most relevant European deals of the year among Technology companies.

The merged Company's core assets will be:

- ✓ A team of 300 skilled professionals in 9 countries (Spain, Italy, France, Germany, UK, US, Finland, Bulgaria, Austria)
- ✓ A model based on various complementary lines of business/revenue streams
- ✓ 20 million subscribers to its SMS/email services all over Europe
- ✓ A significant Customer portfolio both for Advertising and Technology Services
- ✓ A unique set of technical assets for the IMS
- ✓ 2 recognized brands and a very strong position in Italy and Spain
- ✓ Relationship in place with all the major European Mobile Operators
- ✓ Strong financial backers

For further information about the company please refer to:

www.myalert.com
www.myalertwireless.com
www.buongiorno.com



The ARC Group company profile

ARC Group provides a range of Analysis, Research and Consultancy services to leading clients around the world, with a team of full time consultants based in the UK supported by a global network of associates and analysts. Our prime objective is to provide our clients with first class advice, information and support in making key decisions for their business. Our core specialisations include:

- ✓ Wireless Internet
- ✓ Wireless Technologies and Infrastructure
- ✓ Digital Broadcasting
- ✓ Broadband Access
- ✓ Telematics
- ✓ Optical Communications

Our approach is both innovative and thorough, ensuring that we constantly exceed our clients' expectations of in-depth analysis, strategic clarity and cutting edge insights. Clients find ARC Group's range of products and services invaluable for identifying, understanding and capitalising on rapidly changing business opportunities in the volatile communications industry.

As part of the Informa Group, ARC Group has access to a multitude of global information resources. Our extensive knowledge database includes industry conferences and exhibitions such as the GSM World Congress (IBC Conferences) as well as several leading publications, including Mobile Communications International and Baskerville newsletters. ARC Group is also a sister company to EMC, compilers of the highly regarded telecommunications industry databases upon which we build original forecasts.

ARC Consultancy

ARC conducts customer-specific assignments for clients who need research, information or advice specifically tailored to their business needs. Our consultants have extensive experience in advising network operators, equipment and component manufacturers as well as investors. Areas of expertise include: research of business opportunities and threats, market entry and company strategy, industry surveys, technology and market forecasts, value chain analysis.

ARC Strategic Reports

Our Strategic Reports are unparalleled in achieving a fine balance between technology and market issues and are highly valued for their thorough analysis and accurate forecasts. Central to our Strategic Reports is extensive primary research giving an excellent overview of each industry segment.

The reports also give information about the state of the industry in specific regions, providing clients with relevant indications about particular markets. They have become an indispensable tool to help executives plan successful strategies. While providing a wealth of technological detail, the reports are presented and written in a clear, comprehensible style, thereby allowing non-technical managers to get a concise picture of the industry.

***'I was extremely impressed with the author's in-depth knowledge of the cellular industry'
BE, European Marketing Manager, Molex Services***

Industry Surveys

Industry Surveys provide timely and unparalleled insights into market and technology developments. They contain a wealth of original primary data, charts and quantitative analysis based on the opinions of leading industry experts. Data is collected at leading events and is then analysed using various cross-correlations including industry sector, geographic segment and type of company. Recent survey titles include:

*'An excellent piece of research' 'We found the survey very thorough and invaluable for planning our product'
RB, Product Marketing Manager, TANTAU Software*

e-brief

e-brief is a powerful online conference reporting service covering major mobile events around the world. The e-brief service provides conference overviews (highlighting the key discussions, issues and trends raised during the event) and includes individual speaker summaries complete with relevant tables, charts and graphs. e-brief covers a minimum of 20 conferences a year to keep the busy mobile professional informed of the latest developments in this fast moving industry.

*'A perfect summary of the conference, providing the real essence of the presentations in a handy format'
AZ, Marketing Manger, Ericsson*

*'An invaluable source of information for those in the company who were unable to attend'
Mr P Weichsel, Consultant, Theron Business Consulting*

Information Service

A flexible and timely information service especially designed for busy executives. Based on a modular concept and a close relationship with one of our consultants, the service will help you cope with rapidly changing market demands. The service includes features such as on-line support, technology and market updates, etc.



WAA profile

The Wireless Advertising Association is the premier global industry trade association devoted to hand held device manufacturers, carriers & operators, software providers, agencies, retailers and advertisers and service providers of mobile wireless marketing and advertising. Originally formed in May 2000 with a merger of the WAIA (Wireless Advertising Industry Association) and the IAB's (USA) Wireless Task Force, the WAA is now operating independently to address the challenges facing the wireless industry. WAA's activities include evaluating and recommending standards and practices, fielding research to document the effectiveness of the wireless medium, and educating the wireless (mobile) advertising industry about the effective, responsible use of wireless advertising.

Wireless Advertising raises a whole new set of questions about privacy, spamming, location, revenue streams, media buying, sales training and consumer awareness. The concept may be clear, but the technology, marketing and sales logistics are far from it. With dozens of devices, countless specifications and a future which promises greater functionality than most can imagine today, the path ahead is far from uncertain. For all of the apparent hurdles, the prize for the winners of this race are a marketers dream: highly targeted, flexible, dynamic and vast audiences who can make on-the-spot inquiries and purchases. And they will, due to the WAA's initiative efforts in setting standards and metrics and developing consumer and customer education and awareness.

WAA's Vision and Initiatives

The Wireless Advertising Association (WAA) is devoted to addressing the major challenges facing the wireless advertising industry. Initiatives include:

- ✓ Developing metrics for measuring ad delivery and the consumers' response to those ads
- ✓ Developing open and compatible wireless advertising technical and creative standards
- ✓ Defining and publishing wireless advertising best practices and voluntary guidelines on privacy, ad delivery and ad measurement
- ✓ Proving the value and effectiveness of wireless advertising to advertisers, agencies and consumers
- ✓ Serving as the key advocate on behalf of the wireless advertising industry
- ✓ Being the primary source of information and expertise about wireless advertising for its members and for the advertising community at large

The WAA counts on pioneers like you to help secure the industry's growth and is expanding its efforts to shape and evolve wireless advertising by providing:

Representation: Through its representation in Washington, D.C., and its participation in industry-wide groups, the WAA's collective voice is heard.

Information: Stay on top of industry trends that will help you build your business. The WAA produces information resources that are focused on your needs.

Interaction: WAA seminars, conferences, events and Initiative Work Groups allow you to network with your peers, among the most influential in the industry. Committees focusing on ad delivery, privacy and consumer acceptance, ad measurement, and ad models/creative standards put you in touch with the dynamic, expanding wireless universe and provide you with a forum for shaping the industry's future.

Included among the many benefits of your company's membership in WAA are:

- ✓ A collective voice representing the interest of companies engaged in selling advertising on wireless platforms
- ✓ Access to proprietary research, educational and sales training materials
- ✓ Special discounts to industry publications, newsletters and conferences
- ✓ Member discounts at WAA events, conferences and trainings
- ✓ Company listing and link from the WAA Web site
- ✓ Free job postings on the job hotline section of the WAA Web site
- ✓ Free event posting on the event section of the WAA Web site
- ✓ A forum for evaluating and shaping the industry's future
- ✓ An intellectual resource to further your professional development
- ✓ An extensive range of initiative working committees
- ✓ An arena to participate in industry seminars and functions
- ✓ A global scope of working industry initiatives

For further information about the organisation please refer to:

www.waaglobal.org

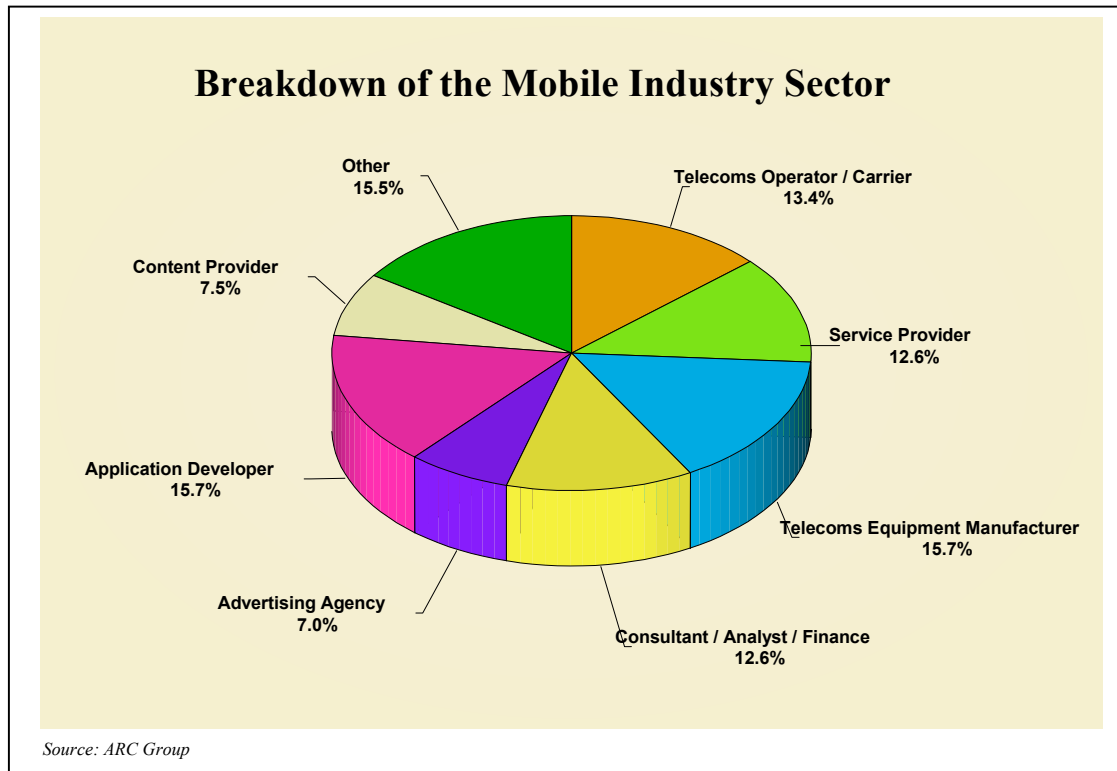


Market Overview

The widespread adoption of mobile devices is occurring, in large part, because these devices fit the way we wish to live. Consumers want unrestricted access to services and information wherever they are. Mobile devices help fill many consumers need to be always connected and always informed.

It's a growing industry and all players are offering mobile products and services to consumers that need to be more and more connected and informed.

According to The ARC group the Mobile Industry breakdown is as follows:



Mobile growth

According to the GSM Association, an independent body charged with the aim of furthering the cause of the solutions, the GSM wireless service is now so large and popular that by next year one in twelve people in the world will be connected to the service.

So great in fact is the momentum behind the service that month alone is expected to become a record-breaker in its own right - hitting a total 300 million worldwide customers any day now, the organisation believes. This will be a huge growth curve for the service too, taking it up from 125 million customers by the end of March last year (2000), to around 285 million at the end of last month (August 2001) and now the 300 million mark at some point this month (September 2001) - **which is a rise of more than 77% year on year.**

This isn't the sum of the growth of the GSM service however. Having claimed more than 55% of the total wireless marketplace as its own, the GSM service is predicted to continue its powerful growth unabated well into next year and beyond - hitting between 700 million and 1 billion worldwide customers by 2005.

All this staggering growth rate has, according to the GSM Association, been greatly aided by the flood of pre-pay services that have engulfed the marketplace this year and encouraged more and more customers to make the leap onto the wireless trend with easy manageable payments schemes. According to the association in fact, so popular has the GSM network become for such service that it currently represents around 76% of all pre-paid wireless customers.

GSM isn't the only standard in the marketplace however, in fact far from it, and despite its clearly staggering growth it is really all kind of irrelevant. In 2004, when UMTS is finally available across the world, the GSM standard will undoubtedly crumble as everyone switches over to the 384kbps, 3G capabilities of the UMTS worldwide standard.

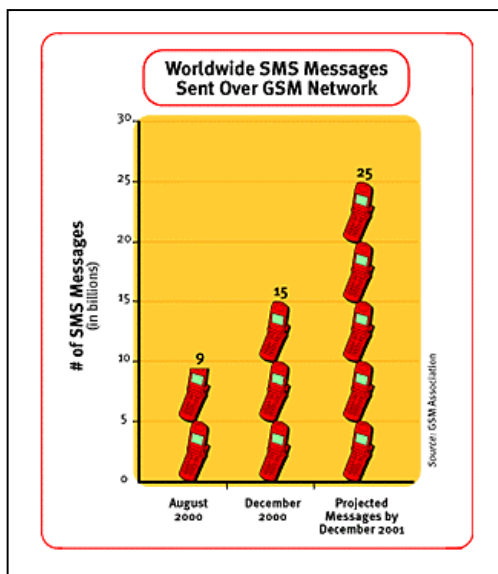
SMS growth

The Short Message Service (SMS) is the ability to send and receive text messages to and from mobile telephones. The text can comprise of words or numbers or an alphanumeric combination. SMS was created as part of the GSM Phase 1 standard.

The first short message is believed to have been sent in December 1992 from a Personal Computer (PC) to a mobile phone on the Vodafone GSM network in the UK. Each short message is up to 160 characters in length when Latin alphabets are used, and 70 characters in length when non-Latin alphabets such as Arabic and Chinese are used.

For a relatively simple messaging service, there are a lot of elements that need to be taken into account when developing and deploying SMS.

There is no doubt of the success of SMS, the market in Europe alone has reached over one billion messages despite little proactive marketing by network operators and phone manufacturers. Key market drivers over the next two years such as the Wireless Application Protocol (WAP) will continue this growth path.



Over 390% annual growth in SMS traffic was realized in the UK from November 1999 to November 2000.

source: mda-mobiledata.org

According to the GSM Association, text messages sent across the world hit a staggering 50 billion in Q1 of 2001. This represents an impressive rise. During the same period in 1999 there were only 3 billion text messages sent, Q1 2000 saw around 10 billion, and now there's five times that figure being sent across more than 500 million global GSM users. Rob Conway, the GSM Association CEO said, "The continued success of SMS is....primarily because it is a universally available service and the ubiquity of GSM handsets on offer globally."

SMS Advertising

The explosive growth in Mobile services heralds the arrival of wireless as a primary communication medium offering exciting new advertising and 121 marketing opportunities and demanding that wireless become a carefully considered part of the overall marketing communications mix.

Recent messaging programmes are delivering very positive results and evidence that:

- ***Wireless users are very accepting of advertising that is delivered within the context of relevant, value-added messages that match the user's profile.***
- ***Wireless is an efficient vehicle for building brand awareness because it has the ability to deliver highly targeted, time-sensitive messages to captive audiences. Brand awareness can also be significantly increased through leveraging recognizable events and activities.***
- ***Wireless messaging campaigns are uniquely tailored to appeal to a wireless user's interests and preferences thus delivering strong brand recall and click-through rates.***

With mobile users depending more heavily on receiving alerts and other notifications via SMS, an extremely effective ad medium has emerged for advertisers. The effectiveness of SMS messaging lies in its ability to deliver highly targeted, time-sensitive messages to captive audiences; basically, the ability to deliver SMS wherever the users is and whenever its demanded. In addition, sponsorship opportunities can effectively leverage recognized events and activities to enhance brand awareness.

Analyst firms predict wireless messaging programs will prove to be extremely cost-effective. Based on the ability to develop highly targeted information, wireless response rates are often compared with those of direct mail. However, preliminary results indicate that wireless programs have much higher response rates than direct mail at a lower cost per lead.

Wireless offers advertisers a unique means of delivering value and growth that is driven, in part, by advertisers who quickly learn and understand consumer wireless behaviour. At this critical juncture, advertisers have the opportunity to add value and interest in wireless messaging and can therefore shape its use and become a catalyst for widespread wireless Web adoption. Advertising, promotions and sponsorships for wireless are not just inevitable, they will play a vital role in the evolution of the wireless environment.

Consumers are increasingly sensitive to unsolicited information, particularly as it hits closer to home. To ensure the capability for targeting is not misused, advertisers should take responsibility to target users judiciously and deliver content that is considered a value-add. The concept of opt-in must come to mean that a consumer has control over the messages he or she receives.

The personal nature of wireless devices also allows for the developing communities of like-minded users. Through this community building, simple brand awareness transforms into strong positive associations. Community building will also increase the amount of time spent sending and reading messages and will therefore increase ad exposures.

Judicious targeting, delivering value-added content, maintaining opt-in policies and nurturing of communities are just a few key components to developing an effective wireless campaign.

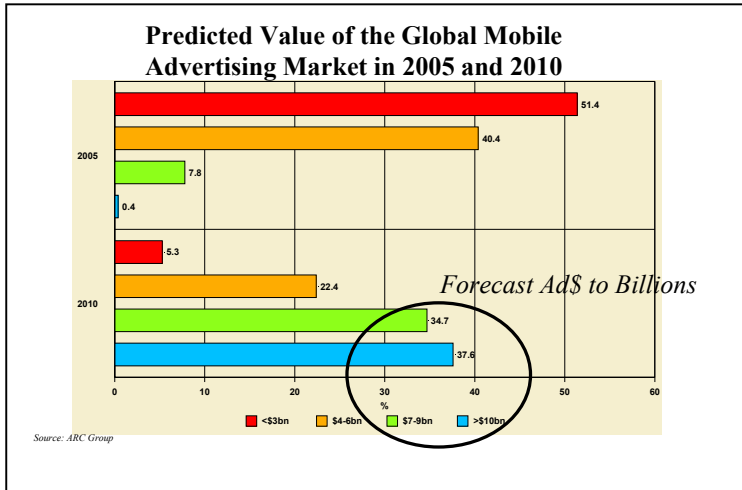
Mobile phone text message ads look set to provide high returns for marketers as research reveals they can generate more than 80 per cent brand awareness levels. The research was undertaken, by research firm Interquest, in Finland where use of SMS ads has been more widespread.

As you will see, findings keep backing up such positive results, not to long ago and according to other qualified sources, not only are customers receptive to advertising messages delivered to them via their mobile phones, but they remember the brand messages and respond to them as well.

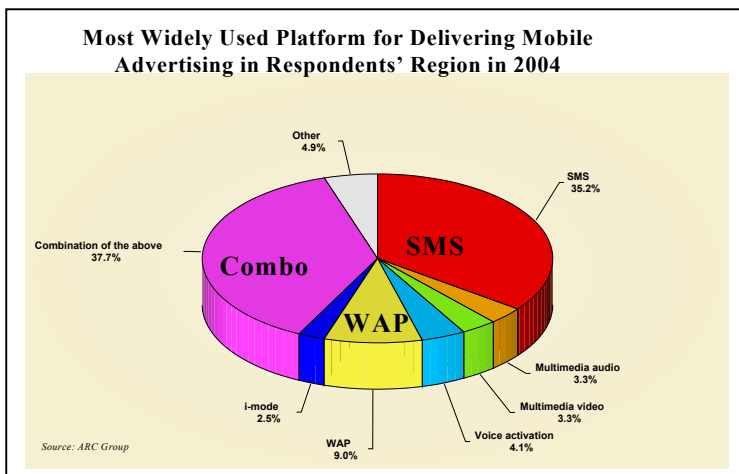
- ***60% said they liked receiving advertising messages targeted to their profile.***
- ***40% found the advertising delivered to their mobile phones to be compelling.***
- ***20% sought more information after receiving a wireless ad.***
- ***77% of users said they would be willing to receive advertising on their handsets to reduce or eliminate other charges.***
- ***The study also revealed that 34% of wireless users are interested in wireless-portal services***

(Source: Netsurvey (www.netsurvey.com) study of 5,000 users, commissioned by multi-national technology company Ericsson (www.ericsson.com) and by Mediatude (www.mediatude.com), a London-based mobile marketer. Strategis Group survey of 500 wireless subscribers)

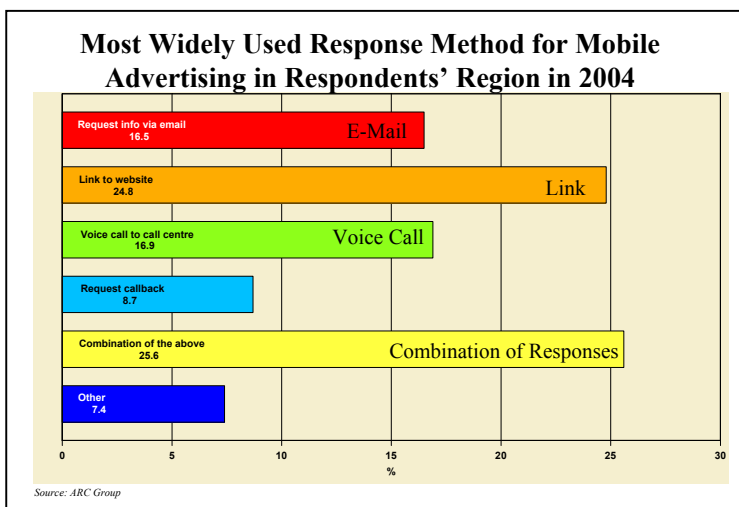
Research carried out by The ARC Group reveal the future of Wireless Advertising:



Economic forecast for Wireless Advertising



Wireless Advertising communication channels forecast



Forecast for Wireless Advertising Strategies

Mobile CRM

Mobile computing in the form of wireless devices is becoming ever closer to being a reality. With the heavily pervasive nature of mobile devices CRM is often seen as the second most important mobile application behind personal communication in the form of email and instant messaging. The use of CRM in the mobile environment has immense potential for both the customer and supplying organisation.

Firstly from the customers perspective mobile CRM will enable wireless devices to be used as front ends to customer self service systems that deliver a subset of the functionality provided by the associated web site. This functionality could involve sales, administration or service related activities and of course must be provided in a consistent manner to any other channels.

Mobile computing provides further opportunities in the CRM space, especially in terms of marketing opportunities that are location sensitive. A typical example would be that a restaurant wants to attract customers who are in the locality and make them aware of a special promotion. In order to achieve this a message would be sent to potential customers that are within a certain geographic radius, this way the restaurant would give details of the promotion and offer the ability to make a table reservation. Nowadays many Night Clubs offer customers the chance to become part of their SMS mailing list so that they can be reached for special events and acts. A CRM approach.

Taking this approach offers the customer value, in terms of the promotional offer, interaction with the responding message to make a reservation and could be made time sensitive, for example the advertising of a cocktail bar happy hour. In this example the information is pushed at the potential customer and the use of this technique must be very carefully managed and selective in nature, with the adoption of mobile computing it will be all too easy for service providers to flood users with information that will become mobile spam and consigned to the trash bin accordingly.

Taking the example of the user pulling information from the service provider is the one that is more likely to be adopted. Here the user will send a request for restaurants in the surrounding area and will be provided with the appropriate details and the opportunity to make reservations. The use of mobile CRM provides the ability to deliver far richer data to the user, not only the availability and location of restaurants but the additional information of promotions, which may be decisive in the customer's ultimate selection.

SMS M-Commerce

According to Durlacher Mobile advertising will be the number one mobile commerce / mobile services application (23%) by 2.003 since the mobile device provides unrivalled one to one marketing capabilities, which the direct marketing industry will exploit rapidly. Mobile financial services, e. g. stock broking, banking and payment (21%) as well as personalised, often location –based mobile shopping services (15%) will also contribute significantly to market development. Mobile entertainment will become a major driver for mobile commerce only after 2.003 using EDGE and UMTS.

Having said this, the principle of purchasing low-value products by SMS requires little technology and lots of content variety, a good way forward to offer M-commerce services for the time being as consumers are often put off by a complicated buying process. Nonetheless m-commerce is set to explode over the next two years according to analysts. Durlacher, the internet investment group and who earlier on this year presented a thorough m-commerce study, predicts that the European m-commerce market is expected to grow from Euro 323 million in 1998 to a massive Euro 23 billion by 2003.

For most consumers, m-commerce will be a new experience, since most of them have used their mobile phone primarily for voice, and more recently for SMS messages. According to a Nokia study on mobile VAS (Value Added Services), the primary target markets for m-commerce consumer services are:

- ✓ Teens (18 years and under)
- ✓ Students (19-25 years old)
- ✓ Young business- people)

The business market can be divided into three main categories of organisations that possess distinct m-commerce needs:

- ✓ Sales-driven organisations, such as manufacturing companies and banks
- ✓ Service-driven organisations, such as consultancies and system houses
- ✓ Logistics-driven organisations, such as taxi companies or courier services

Depending on which segment it falls under, a company will become more likely to use a specific mobile commerce application, such as CRM (Customer Relationship Management), fleet management or integration of mobile devices into corporate ERP (Enterprise Resource Planning) systems, which are now being developing for this new mobile generation.

Finally, it should be pointed out that payment agents play an important role as an enabling force in the m-commerce value-chain, although the dominant mode of payment for m-commerce services has yet to be determined. Banks have been traditionally the natural providers of payment agent services. Now they are becoming increasingly concerned about the future role of mobile operators, who

allow their subscribers to charge purchased goods and services to their telephone bills (e.g. Sonera) . Due to this banks themselves are becoming front-runners in mobile commerce.

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Research Design

This consumer survey was conducted via e-mail and MyAlert users were randomly targeted. This e-mail questionnaire was sent to 25.000 MyAlert users, 5.000 e-mails to users from each of the following European countries: Spain, Italy, UK, Germany and France.

The e-mail questionnaire was made of 22 simple questions, all of them related to present and future SMS services. Consumers were given 1 month to respond (August 2001).

585 consumers responded to the questionnaires, which uncouncted for a 2,3 response rate.

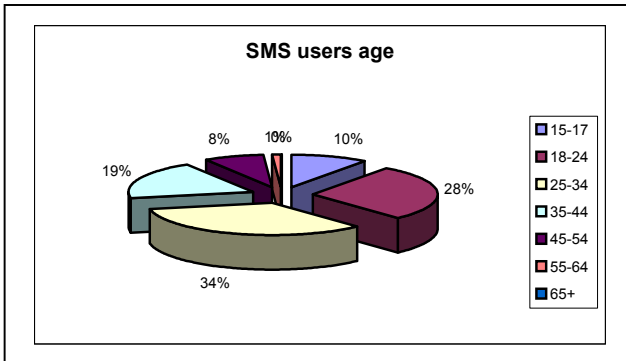
The findings and some conclusions are drawn in the following pages.



Key Findings

MyAlert collected the following demographic information in the study:

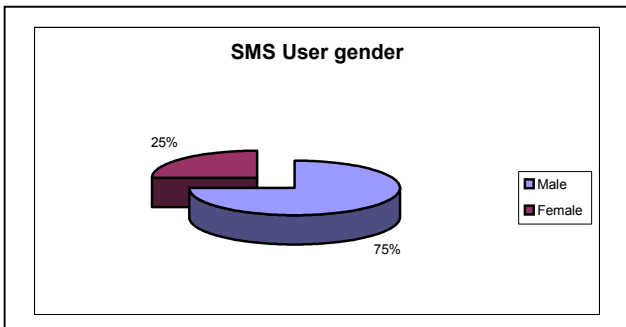
AGE:



One can see that MyAlert's heavy users range from the age of 18 to 44. This depicts that people in their 20s and 30s are mostly SMS heavy users

(According to the survey, conducted by the consulting firm A.T. Kearney and Cambridge University's Business School, found SMS usage among 35-to-54-year-olds was even more dramatic, 20 percent, and in both the 55-64-year-old and 65-plus categories usage grew by 14 percent. Sept. 2001

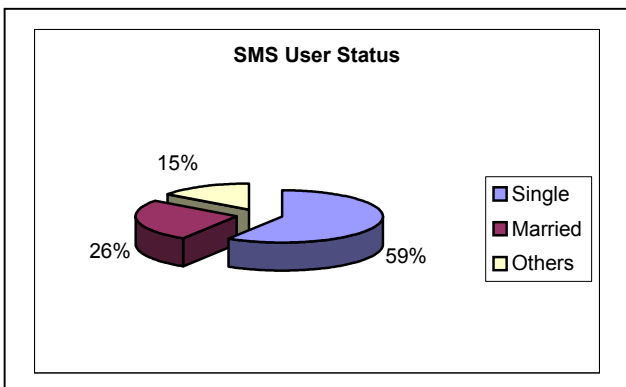
GENDER:



This chart verifies that the majority of SMS Alert users are male. Internet users and SMS Alert users conclusions are very similar in term of Gender and Age.

(According to Nielsen/ NetRatings 61% of the Internet population is male.)

STATUS:



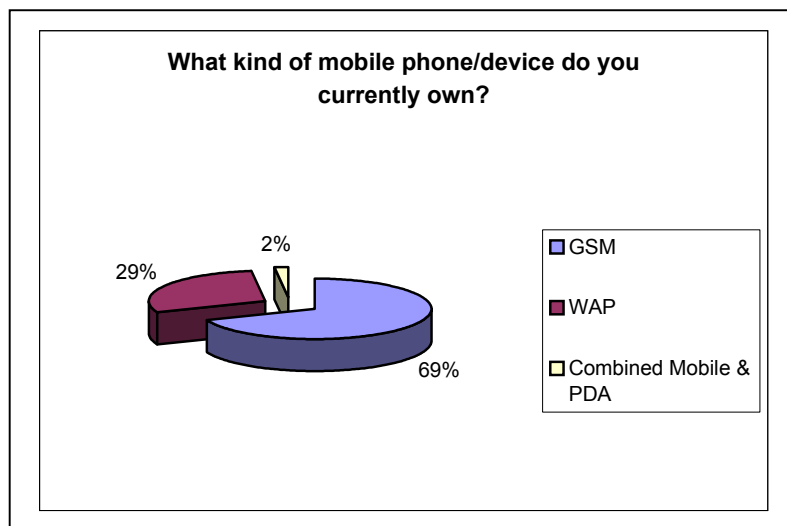
This information supports the fact that users are mainly young, within 20s and 30s, and are therefore single.

The following part of this study indicates user perception in the different areas of interest:

- ✓ Type of mobile devices used
- ✓ Mobile use
- ✓ SMS use and acceptance
- ✓ SMS advertising acceptance
- ✓ SMS M-Commerce / M-Coupons use
- ✓ Pay per use SMS information / content acceptance

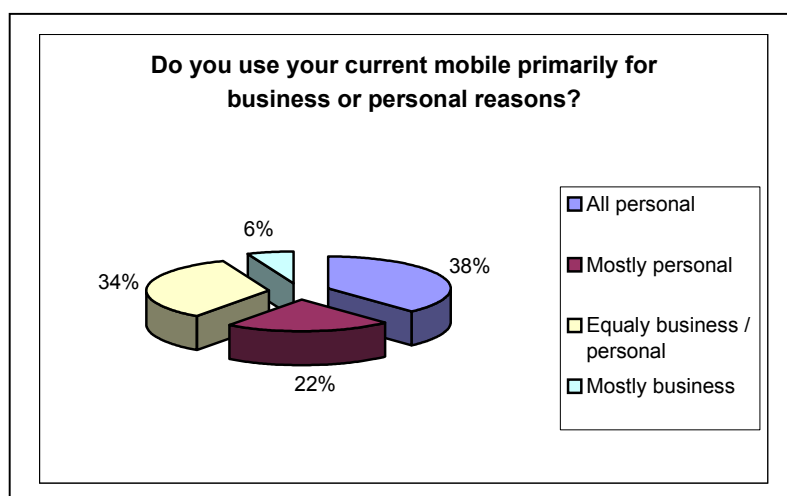
Pie charts and percentages shown provides a general understanding of user perception and behaviour towards mobile and SMS services.

TYPE OF MOBILE DEVICES USED:

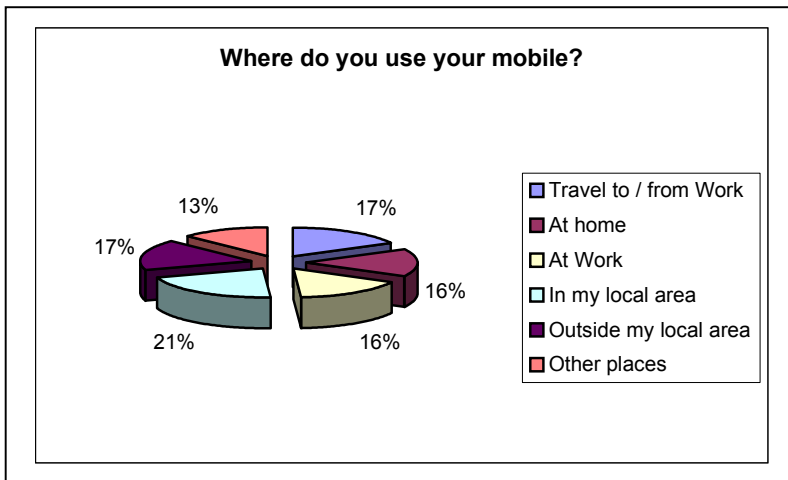


Result patterns for this question matches with European market penetration figures regarding GSM, WAP and PDA devices.

MOBILE USE:

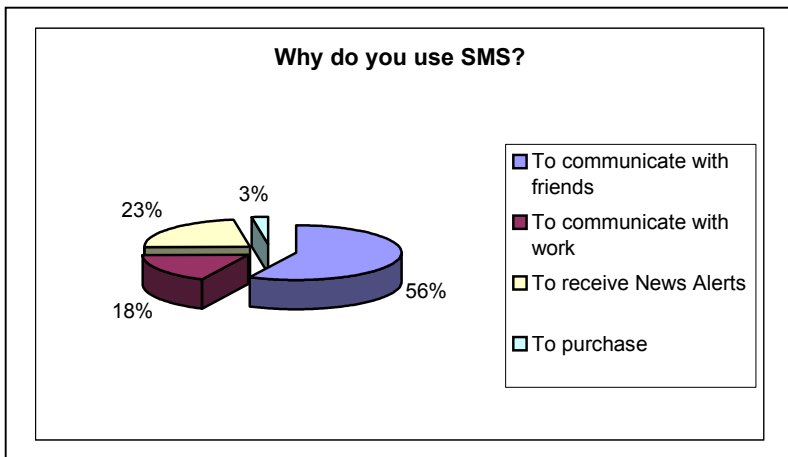


Figures reflect that a great deal of mobile use is made for both personal and professional use. People do not want to have 2 mobile devices.

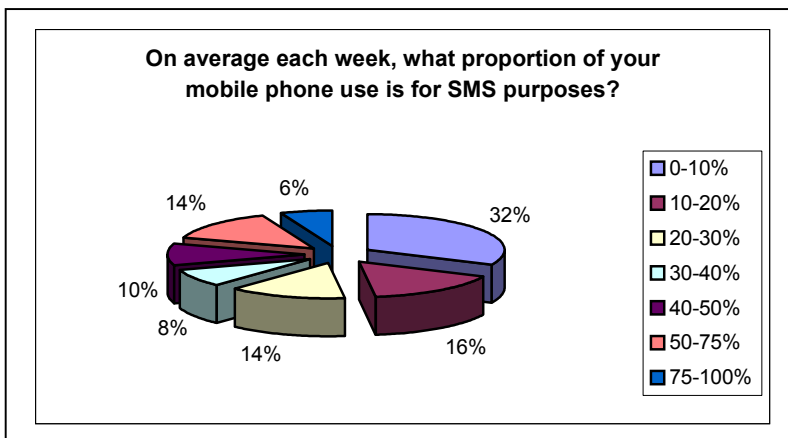


Users use their mobile in their living / working area.

SMS USE AND ACCEPTANCE:

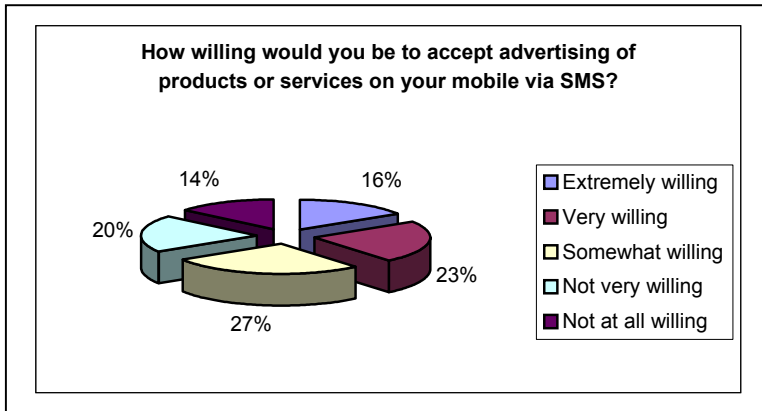


Users mostly use SMS to communicate with friends and secondly to receive Alerts requested by them

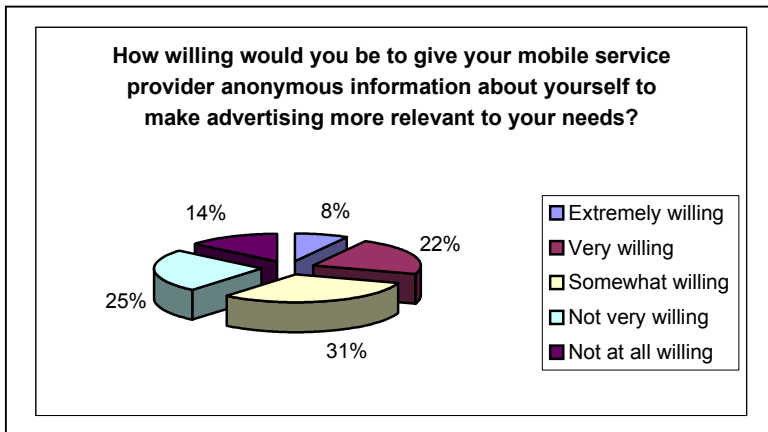


The weekly SMS use ranges between 0 and 30%. Which implies that SMS is great as a second communication channel.

SMS ADVERTISING ACCEPTANCE:

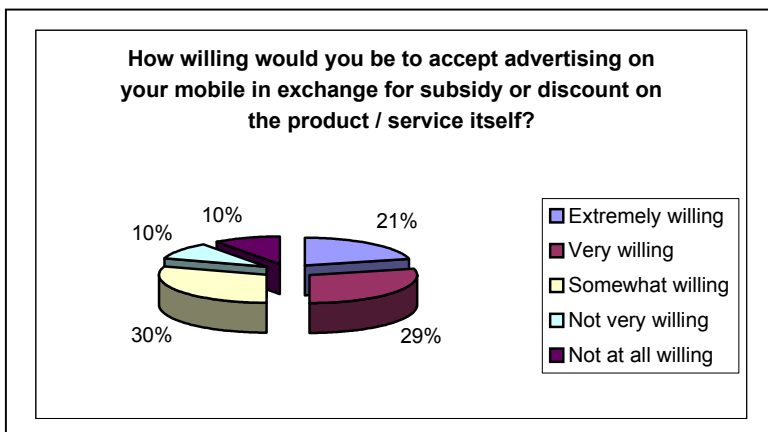


In general terms SMS users are willing to receive advertising about products / services. If products / services are targeted to the right profile then advertising is less intrusive and therefore accepted better.

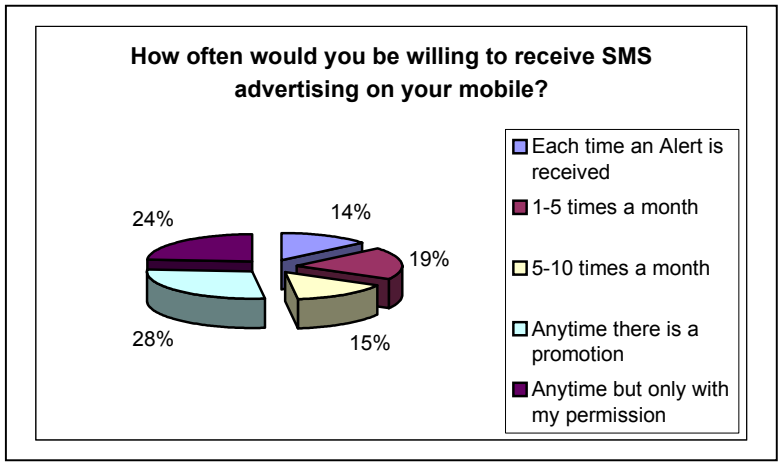


SMS users prefer to receive relevant advertising to their interests.

Other market studies prove that correct SMS profiling and targeting improves marketing/commercial results

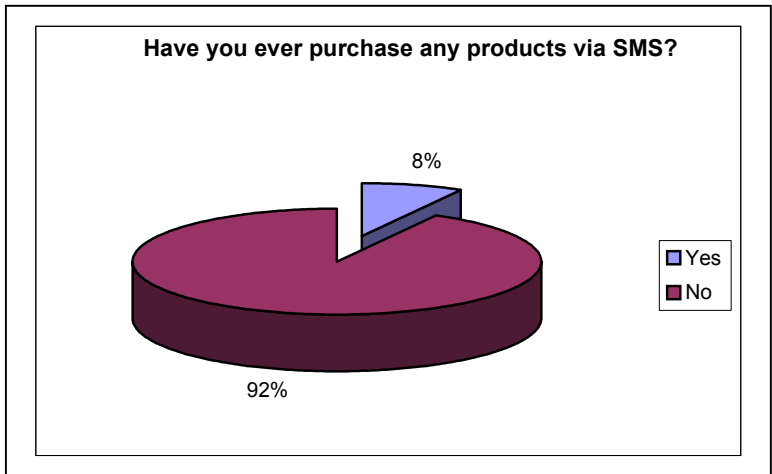


SMS Targeting is important but so is other value added promotional Alerts. Users need incentives in today's competitive world.



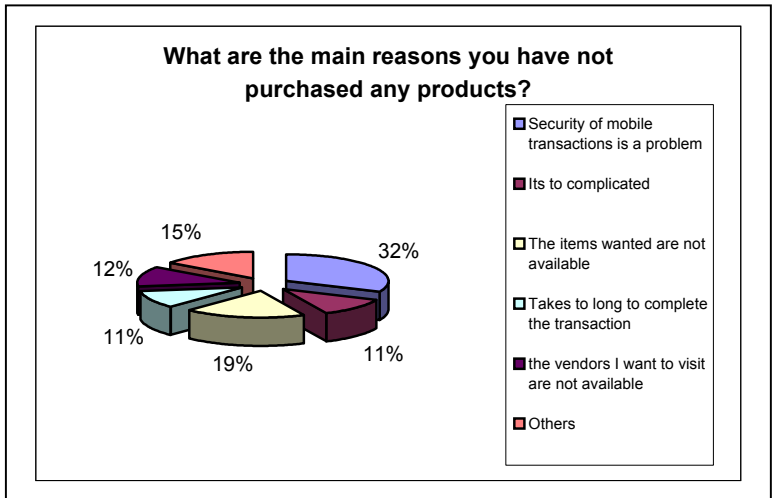
Interesting results as our users are willing to receive SMS advertising at any given time as long as it matches their interest or requests it.

SMS M-COMMERCE / M-COUPONS USE:



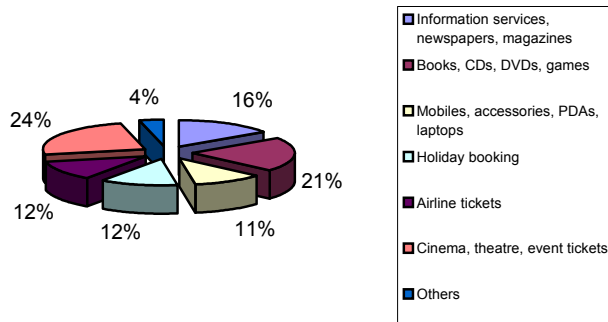
This kind of results are expected since E-commerce services are growing very slowly worldwide and M-commerce services even slower.

Please note that in this survey SMS users are regarded mobile and internet heavy users and that regardless of this they still do not make to much use of M-commerce services



Transaction security is mainly the cause of such small use of M-commerce services. There are other reasons but once confidence and reliability is in place other reasons can be solved

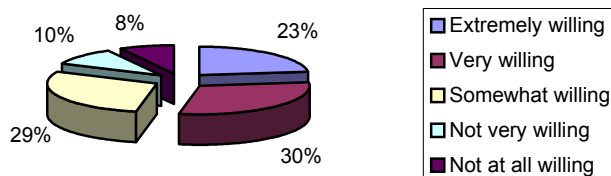
What kind of products would you be willing to buy using your mobile phone?



Leisure and information services are the most wanted M-commerce services. They are also small transactions if we compare it with travel or techi. products.

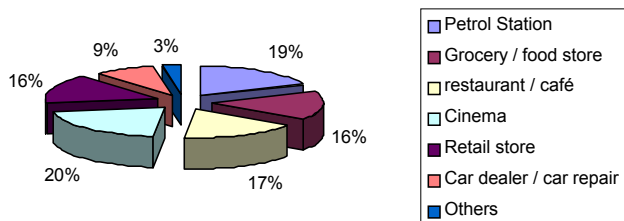
Users are now willing to buy but with reasonably small transactions

How willing would you be to accept coupons or discounts via SMS on your mobile if you could choose the range/type of products available?



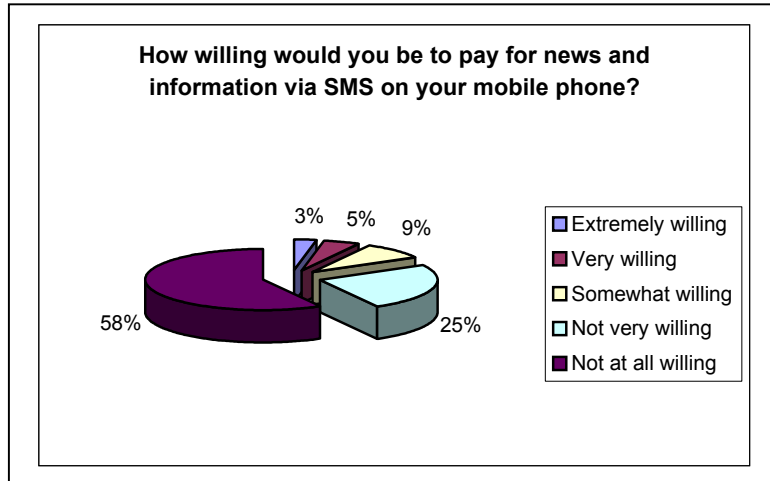
Results are positive since the majority of users would purchase with coupons

For what type of products / service would you like to receive SMS coupons or discounts on your mobile?



Leisure and consumer products are the most relevant in life and so in this case

PAY PER USE SMS INFORMATION / CONTENT ACCEPTANCE:



Users have been spoiled with so many Free on-line and SMS information services that no one is presently willing to pay per use.

However, pay per use services depend on the content as well as the market.

Conclusions

From the market research and consumer survey carried the following snapshot conclusions have been made:

- ✓ User personal information is fragile information that users really want to keep private
- ✓ Its is important to target users precisely and according to their interest
- ✓ It is important to personalise as much as possible
- ✓ SMS content, news and information is demanded and accepted by users, although its presently wanted for free
- ✓ Opt-In from users must be respected
- ✓ Younger users are more receptive to SMS services
- ✓ SMS advertising is accepted positively when opt-in by user.
- ✓ 66 % of users are willing to receive Advertising.
- ✓ The impact of SMS advertising is very high because the user is waiting for the information.
- ✓ SMS couponing and promotions are highly accepted advertising strategies by users
- ✓ M-Commerce is not a short term great revenue generator although it will be by 2004
- ✓ M-commerce Leisure and consumer products are the most accepted by users
- ✓ Payment security is an issue for M-commerce users

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