

Mobile Intel Series:



Mobile Insights for Automotive Brands

a Millennial Media / comScore Automotive Study

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The Opportunity

Driven by Smartphone and tablet adoption, and increased consumption of mobile content by consumers, mobile advertising has taken hold and is positioned for further rapid growth. In June 2011, Gartner projected that the worldwide market for mobile advertising would double from \$1.6 billion in 2010 to \$3.3 billion.

This guide is designed to help automotive marketers plot a successful course with their mobile advertising strategies, including analysis around:

- **How brands can utilize mobile to reach and engage auto intenders and build brand loyalty**
- **Who mobile automotive consumers are & how they use their mobile devices to research cars, find dealers, and engage with auto brands post-purchase**
- **What leading automotive brands are doing in mobile today**

The insights here are based upon a study Millennial Media commissioned with mobile measurement firm comScore, and Millennial Media's network observations across thousands of mobile ad campaigns.

comScore Mobile Automotive Study

The study Millennial Media commissioned with comScore surveyed consumers, including those who consume automotive content on their mobile devices, with several key objectives in mind:

- Explore the mobile automotive industry and understand its growth and dynamics
- Delve into the demographics and behavior of mobile auto consumers
- Understand exactly how consumers use mobile and mobile destinations to help them along the complete consumer journey

Methodology:

Behavioral activity through June 2011
Mobilen Survey Q2 2011, n=40,000
Plan Metrix Mobile Survey Q2 2011, n=15,000

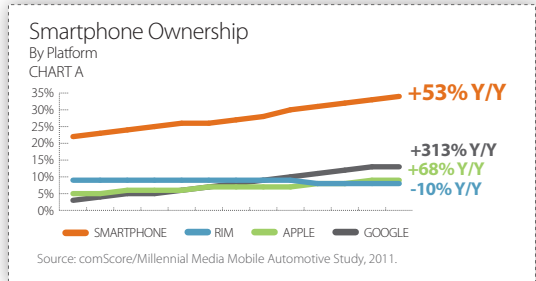


Millennial Media Network Data

The S.M.A.R.T.[™] (Scorecard for Mobile Advertising Reach and Targeting) report data featured is based on actual data from thousands of brand campaigns run with Millennial Media in 2011.

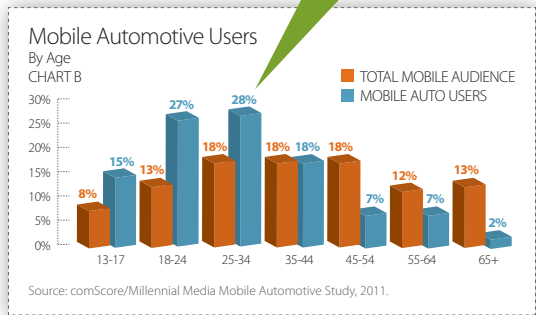
The Mobile Automotive Audience

Smartphones enable mobile users to engage with rich automotive content on their web- and app-enabled devices. According to comScore, Smartphone ownership was up 53% year-over-year (to 34% penetration) as of June 2011 (see Chart A). In fact, 68% of the mobile auto population has a Smartphone. With increased Smartphone penetration, the audience for mobile advertising has grown.



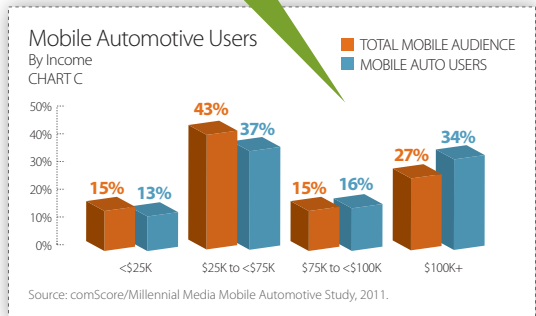
Mobile auto consumers skew younger and are more likely to be male, **68%** male and **32%** female, than the total mobile audience.

According to the comScore study commissioned by Millennial Media, the consumers accessing automotive content on their mobile devices tend to be young males between the ages of 18 and 34. Though females only account for 32% of the mobile automotive population, they represent a significant number of mobile auto users (see Chart B).



Mobile auto users tend to be more affluent than the total mobile audience.

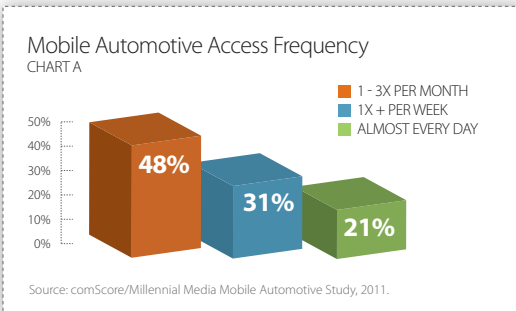
Mobile users who access auto content tend to be more affluent than the general mobile population. comScore finds that mobile auto users overindex in both the \$75,000+ and \$100,000+ annual income brackets, providing auto brands – including those promoting luxury vehicles – an affluent audience (see Chart C).



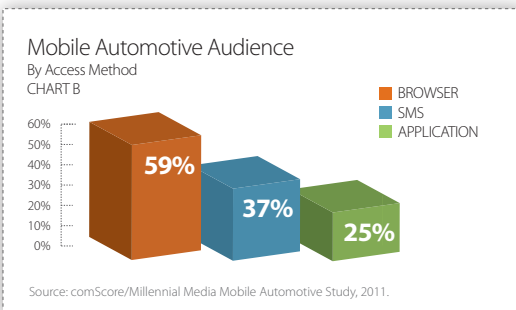
Mobile Automotive Consumption

It is valuable to understand how – and how frequently – consumers are accessing automotive content on their mobile devices. The comScore study reveals that mobile auto users are incredibly active and engaged, which helps auto brands drive consumers from brand awareness to purchase quickly.

Among the individuals who consumed automotive content on their mobile devices, access frequency is high. There is a huge opportunity for auto companies to leverage mobile to connect with consumers researching and considering auto purchases. In fact, comScore reports that 21% of users accessed this content almost every day, with 31% accessing auto content once per week, and 48% accessing this content one to three times per month (See Chart A).



The vast majority (59%) of users access automotive content via a browser (Chart B). While only 25% of mobile auto users choose mobile apps as an entry point to mobile automotive content, this has grown over the past year (from 20% in August 2010), and we anticipate this will continue to grow as auto brands drive advertising to their applications. It is important for automotive brands to reach their target consumers both in-app and on the mobile web, across a variety of devices and operating systems.

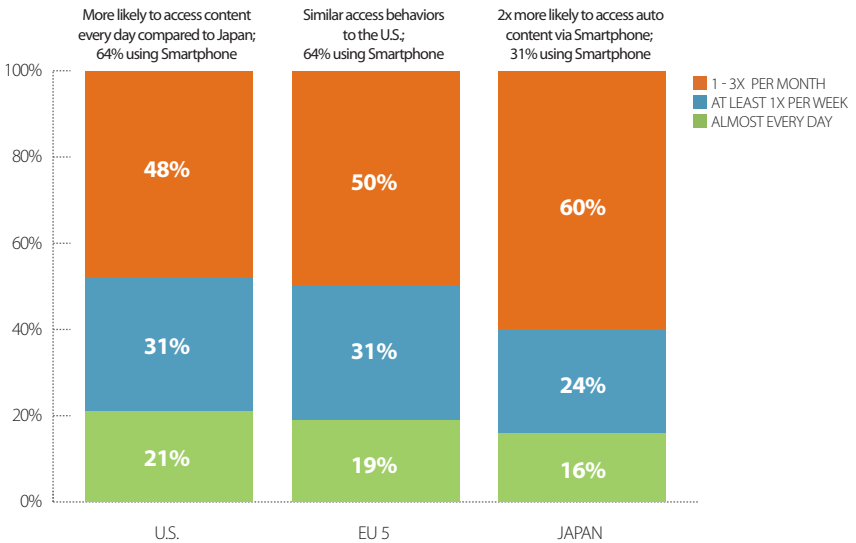


A Global Trend

The heightened interest in mobile automotive content is global, with minor differences between mobile auto users in the U.S., Europe and Japan (see Chart A). Specifically, comScore found that a similar percentage of users engage with mobile automotive content at least once a week (U.S. 31%, Europe 31%, Japan 24%). Japanese mobile auto users are less likely to engage with mobile automotive content on a daily basis, though only slightly (16% in Japan, versus 21% in the U.S. and 19% in Europe). Although only 31% of Japanese mobile auto users access this content using a Smartphone, this is up significantly from August 2010, when only 11% accessed this content via Smartphones.

EU 5 and U.S. mobile auto audiences exhibit similar access frequencies and are more likely to consume auto content every day than Japanese mobile auto users.

Global Mobile Automotive Engagement
CHART A



Source: comScore/Millennial Media Automotive Study, 2011.

Meeting Mobile Auto Consumers' Needs

Overall, the comScore data shows that users rely on their mobile devices to guide them through key steps in the consideration process, across numerous auto research and shopping sites and applications.

Whether consumers are gathering information on new model year offerings, researching vehicle features and prices, or calling / mapping their way to the nearby dealership, consumers are reaching to their mobile devices for assistance and advice. Though an auto purchase is not a daily, monthly, or even annual occurrence, mobile advertising offers automotive brands the ability to enhance brand awareness and affinity well before purchases are even considered, and well after purchases are made. Beyond the purchase point, auto brands are making drivers' lives easier by offering convenient maintenance applications. With mobile advertising, they are driving downloads and usage of these apps.

While a one-off campaign can deliver positive results, Millennial's experience with dozens of automotive clients shows that the most effective campaigns are ongoing, driving brand equity at all stages, with bursts timed to milestones, such as new model year releases, and strengthened by advertising that prompts a desired action (i.e., sign-up for a test drive).

The most powerful campaigns also understand and anticipate the target consumer's needs, regardless of whether they are currently 'auto intenders' or not. When the time comes for a consumer to make an auto purchase, the brand is already in an advantageous position.

Hyundai, for instance, leveraged Millennial Media's network to offer their target audience – affluent business travelers – an easy way to stay in touch with their friends and family via an engaging greeting card application.

Campaign Spotlight: Hyundai

GOAL:

Create an engaging mobile experience that builds awareness and consideration for the Equus luxury sedan.

STRATEGY:

Work with Millennial Media to create a BlackBerry mobile application aimed at affluent men – a demographic that mirrors the target audience for luxury cars. The Hyundai Greetings application enabled these social-savvy and connected consumers to create customized greeting cards in a variety of themes that could be sent to friends and family via email, Facebook or Twitter.

RESULTS:

A double-digit lift in Hyundai's favorability with its target demographic.



To download the full campaign summary, visit www.millennialmedia.com/campaign-summaries

Automotive Brands Leveraging Mobile Advertising

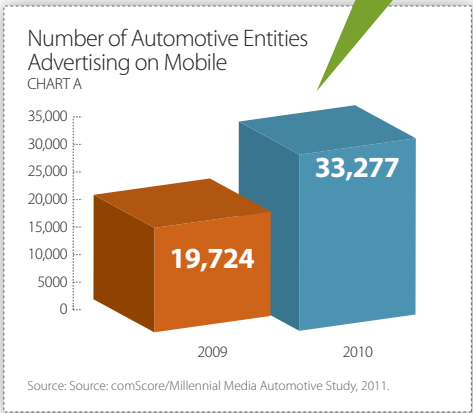
The automotive vertical has been among the leaders in mobile advertising for years, and spending continues to grow at a rapid clip. As more and more consumers engage with mobile content, automotive advertisers continue to invest in the mobile platform.

According to the comScore study, mobile automotive display advertising increased 169% year-over-year, with 19,724 automotive companies advertising on mobile in 2009 and 33,277 in 2010 (see Chart A).

The category growth tracked by comScore is echoed by data released in Millennial Media's Q2 2011 Quarterly S.M.A.R.T.™ report. Based upon thousands of campaigns served in Q2, Millennial also saw strong – and growing – spending in the Automotive category.

Globally, Automotive spending on Millennial Media's network grew 236% from Q2 2010 to Q2 2011 (see Chart B). Strong automotive spending across segments (car, truck, SUV, hybrid), and buying class (luxury, entry point, etc.) has ensured that the automotive vertical has consistently been among the Top 10 global verticals on Millennial's network for the past year.

Mobile auto display advertising has increased 169% Y/Y. Auto companies have adopted mobile advertising, taking advantage of the opportunity to reach consumers early in the purchase process.



Vertical Explosion
Year-Over-Year Spend Growth – Q2 2011/Q2 2010
CHART B

VERTICALS	GROWTH
FINANCE	1095%
RETAIL & RESTAURANTS	956%
PHARMACEUTICALS	426%
AUTOMOTIVE	236%
ENTERTAINMENT	234%
TRAVEL	145%

Source: Millennial Media, Q2 2011.

Automotive Brands Leveraging Mobile Advertising

The Automotive category was the number five ad vertical on Millennial Media's network in the U.S. in Q2 2011, and number nine internationally (see Charts A and B). In good company with a number of other mobile-savvy ad verticals (Retail, Telecommunications, Finance, Entertainment), marketers in automotive leveraged mobile to drive a variety of campaign goals.

Top 10 U.S. Advertising Verticals
Q2 2011 – Ranked by Spend
CHART A

RANK	CATEGORIES
1	RETAIL & RESTAURANTS
2	TELECOMMUNICATIONS
3	FINANCE
4	ENTERTAINMENT
5	AUTOMOTIVE
6	TRAVEL
7	DATING
8	CPG
9	PORTALS & DIRECTORIES
10	PHARMACEUTICALS

Source: Millennial Media, Q2 2011.

Top 10 International Advertising Verticals
Q2 2011 – Ranked by Spend
CHART B

RANK	CATEGORIES
1	PORTALS & DIRECTORIES
2	EDUCATION
3	TRAVEL
4	ENTERTAINMENT
5	FINANCE
6	TELECOMMUNICATIONS
7	DATING
8	RETAIL & RESTAURANTS
9	AUTOMOTIVE
10	TECHNOLOGY

Source: Millennial Media, Q2 2011.

Campaign Spotlight: Lincoln

GOAL:

Position the Lincoln MKX as a highly desired premium luxury automobile, while driving awareness around specific product features and the vehicle's leading fuel economy.

STRATEGY:

Work with Millennial Media and Team Detroit to reach high household income tablet users. Use rich media ads to feature video and drive consumers to a dedicated mobile site, where they can build and price a car, locate a dealer, check inventory or request a quote. Combine new audiences with retargeted users from previous Millennial campaigns to optimize the overall performance.

RESULTS:

The campaign drove significant engagement with both the video and the link to Lincoln's mobile site. In addition, CTR for various channels ranged up to 6X over industry standards.

"Mobile continues to be a focus for Lincoln, and we are consistently rewarded with strong consumer engagement. The MKX campaign let us hit a targeted audience at scale and was a great medium to deliver our message."

~ Brian McClary, Social & Emerging Media Specialist at Ford Motor Company



To download the full campaign summary, visit www.millennialmedia.com/campaign-summaries



Types of Automotive Companies Investing in Mobile

A variety of automotive companies have invested in mobile on Millennial Media's network. These range from brands harnessing mobile to promote vehicle launches and dealer events, to other companies in the automotive ecosystem integrating mobile in the marketing mix to boost lead generation and direct marketing efforts.

The majority of mobile spending, however, comes from Tier 1 automotive advertisers, the national or global OEM brand entities from which most ad dollars originate. While Tier 2 and Tier 3 auto advertisers are increasingly leveraging mobile to achieve their regional or local goals, Tier 1 advertisers continue to buy mobile on a national basis, while delivering locally-relevant messaging to support the needs of regional and local dealer groups.

The comScore study's examination of the top spenders in mobile also highlights the presence of the long tail of auto advertisers, including tire companies, producers of car care products, and auto research sites (See Chart A).

Top Mobile Automotive Advertisers as Tracked by comScore

CHART A

JUNE 2010	JUNE 2011
Toyota Motor Corporation	General Motors Corporation
General Motors Corporation	Toyota Motor Corporation
Ford Motor Company	Ford Motor Company
Volkswagen AG	Hyundai Kia Automotive Group
Hyundai Kia Automotive Group	Fuji Heavy Industries
Nissan Motor Company, Limited	Bayerische Motoren Werke AG
Chrysler LLC	Tata Motors Limited
Daimler AG	Honda Motor Co., Ltd
Bayerische Motoren Werke AG	iMotors.com
Royal Dutch Shell plc	Meguiar's Inc.
Honda Motor Co., Ltd	Mitsubishi Company
Dr. Ing. h.c. F. Porsche AG	Nissan Motor Company, Limited
Classified Ventures, LLC	Daimler AG
Suzuki Motor Corporation	SOPUS Products
National Automotive Parts Association	Armored AutoGroup Inc.
Beck & Masten	Bridgestone Corporation
CODA Automotive	Chrysler LLC
Fuji Heavy Industries	Volkswagen AG
Gunther Motor Company of Plantation Inc.	Cox Enterprises, Inc.
Jiffy Lube International, Inc	Royal Dutch Shell plc

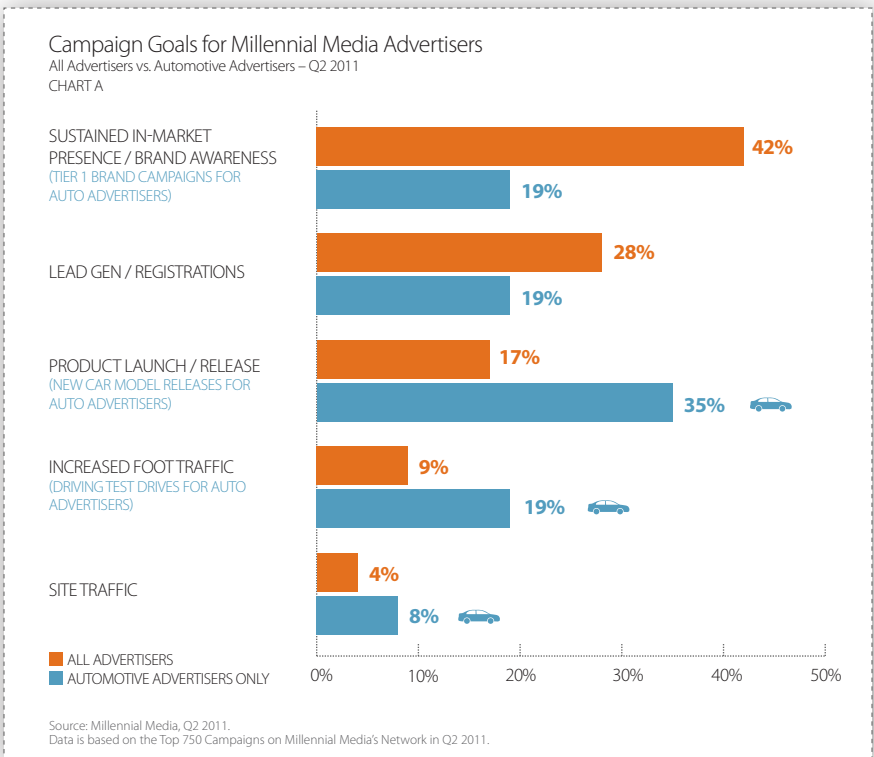
Source: comScore, 2011.

Mobile Automotive Campaign Goals

Automotive brands utilize mobile advertising to achieve a variety of objectives. Based upon Millennial Media’s Q2 2011 network data, auto advertisers heavily invested in mobile to release new models (Product Launch/Release), drive leads for remarketing efforts (Lead Gen/Registrations), increase brand affinity for their products (Sustained In-Market Presence / Brand Awareness), drive foot traffic to dealerships (Increased Foot Traffic) and drive traffic to their persistent mobile sites (see Chart A).

Seasonality also plays into automotive brands’ mobile campaign goals. In Q1, 60% of the auto campaigns run on Millennial’s network were primarily focused on promoting new model year launches. The goals of auto advertisers in Q2 were more diverse, though still led by Product Launch/Release campaigns (35%).

When compared to the campaign goals of all advertisers on Millennial’s network in Q2 2011, Product Launch/Release (for new model releases) and Increased Foot Traffic (traffic to dealerships for test drives) were significantly more important to automotive advertisers than advertisers in other verticals.

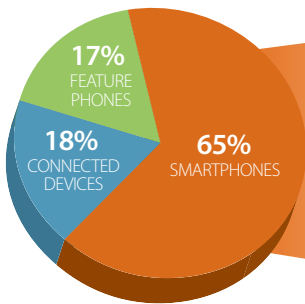


Delivering Target Audiences at Scale

Consumers are accessing content across a variety of devices and operating systems, and effective mobile advertisers take advantage of this fact by running cross-platform ad campaigns (across multiple device types and operating systems). A clear majority of campaigns on Millennial Media’s network are cross-platform, signaling that advertisers recognize the opportunity to connect their brands with people, not just devices.

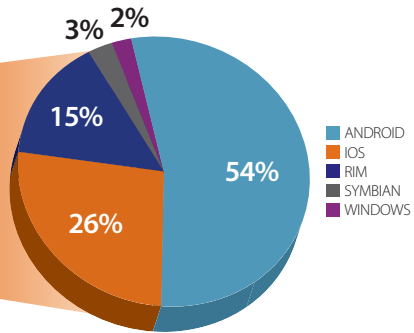
Advertisers who run cross-platform campaigns are able to reach consumers at scale – regardless of whether their target consumer prefers a Smartphone, Connected Device (i.e., Tablet, iPod Touch, etc.), mobile-web-enabled Feature Phone, or any one specific carrier (see Chart A). The Android platform has grown significantly in the past year, but iOS, RIM, and other operating systems still make up a significant portion of impressions on Millennial’s network (see Chart B).

Smartphone, Feature Phone & Connected Device Impression Share
June 2011
CHART A



Source: Millennial Media, 6/11.
Smartphone data does not include what could be considered Smartphones running proprietary Operating Systems, e.g. Samsung Instinct, LG Vu. Millennial Media defines a Connected Device as a handheld device that can access the mobile web, but is not a mobile phone. Examples include Apple iPod Touch, Sony PSP, Nintendo DS, iPad, etc.

Smartphone OS Mix
Ranked by Impressions
June 2011
CHART B



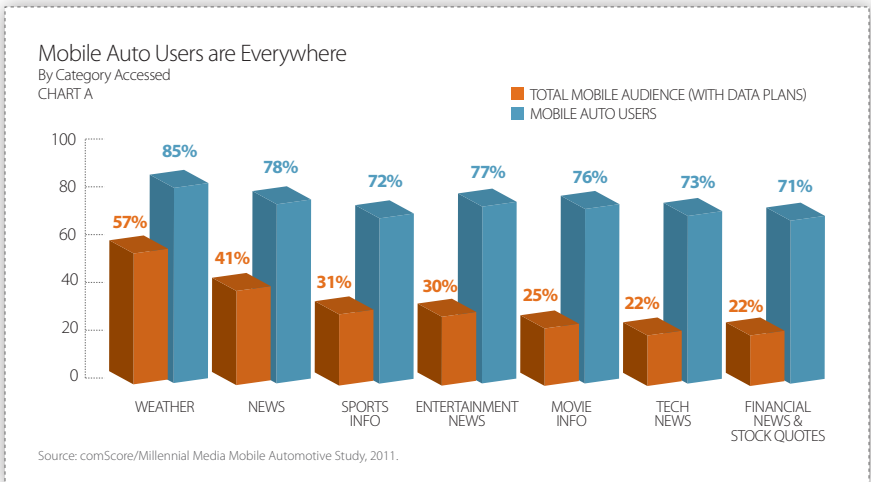
Source: Millennial Media, 6/11.
Other includes webOS, Danger, Nokia OS, Palm OS.

Automotive Targeting Strategies

It is important to keep in mind that consumers access a variety of mobile sites and applications. Mobile auto users are also individuals who access all kinds of content – not just mobile automotive sites and apps.

The comScore study highlights the vast array of content mobile auto users access and enjoy. They spend time on multiple content channels, including mobile weather (85%), tech news (73%), sports (72%) and financial news & stock quotes (71%), among a number of others (see Chart A).

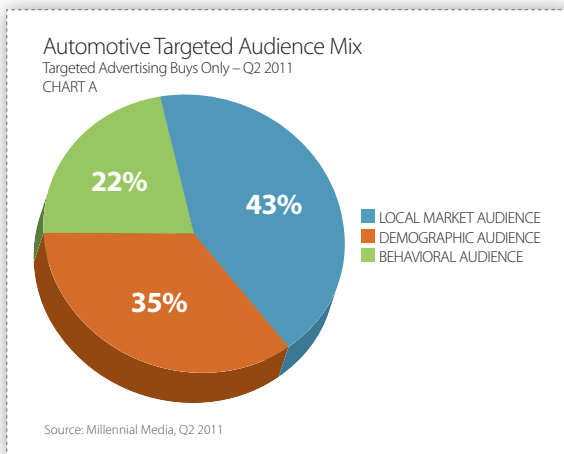
On Millennial's network, auto advertisers also leverage the ability to target by categories or segments. "Green" sites and applications are an ideal place for hybrid campaigns, while family-centric sites and apps provide valuable placements for brands promoting SUVs and minivans.



Automotive Targeting Strategies

In May 2011, more than half of all auto campaigns on Millennial Media's network used some level of targeting (see Chart A). Though buying on a national or global level, the Tier 1 OEM advertisers who leveraged local market targeting drove calls and test drives, directly benefitting regional associations and local dealers.

Auto brands using demographic targeting delivered special promotions to specific segments of the mobile population (i.e., twenty-somethings / recent college grads). In addition, auto advertisers using behavioral audiences to identify and reach auto intenders did so at a higher rate than the general population of Millennial advertisers (22% versus 13% in Q2 2011).



Advertisers who run persistent campaigns can also target engaged users from previous campaigns. Lincoln utilized this targeting technique with Millennial to promote their MKX luxury model to high-income tablet users as well as those who had interacted with Lincoln ads from past campaigns. See the Campaign Spotlight on page 8 for more details.

Engaging Mobile Automotive Consumers

Mobile automotive advertisers can drive specific interactions with their brands and influence buying behavior by the types of ads they run and what they include on those ads.

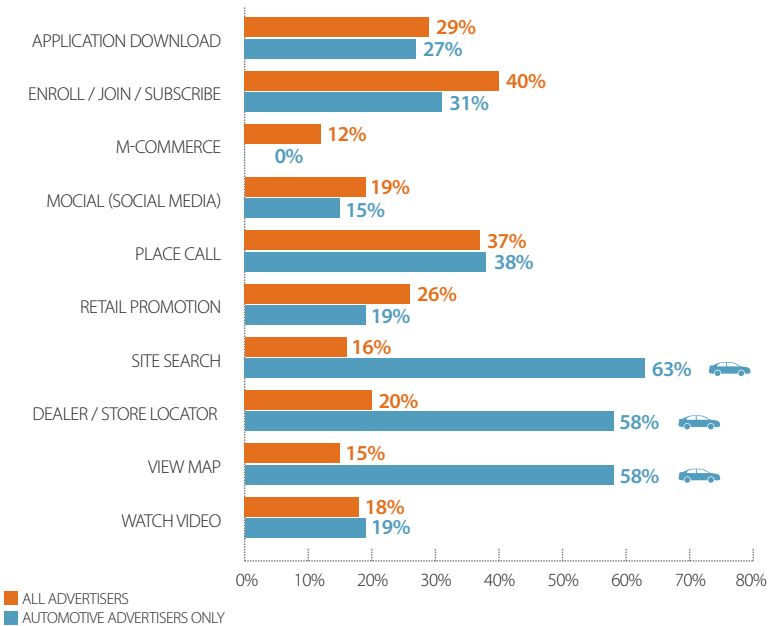
Some engagement tactics are inherently mobile, including ads that allow consumers to click to call a dealer, download an application, or add an item directly to a mobile calendar (i.e., maintenance-focused “time for an oil change” reminders). Compared to all other advertisers on Millennial’s network, automotive brands drove Site Search, Store Locator, and View Map actions at much higher rates – more than 3X in some cases. Place Call was also used on over one-third of auto campaigns in Q2 to drive dealer calls (see Chart A).

Automotive brands also offered an application download option in more than 25% of their campaigns in Q2. With apps being used as research tools for in-market auto intenders and loyalty-building tools for existing customers, the number of app download campaigns will likely grow as auto advertisers continue to invest in their suite of mobile apps.

Post-Click Campaign Action Mix for Millennial Media Advertisers

All Advertisers vs. Automotive Advertisers – Q2 2011

CHART A



Source: Millennial Media, Q2 2011.
 Data is based on the Top 750 Campaigns on Millennial Media’s Network in Q2 2011.

Engaging Mobile Automotive Consumers

Automotive advertisers on Millennial Media's network run a variety of ads to achieve their campaign goals. Many of these campaigns feature the most engaging mobile ads available today, which both draw consumers in and encourage brand interaction.

For example, the use of 360° View functionality allows consumers to rotate a car model so they can view it from every angle. In addition, Media Galleries can show interior and exterior images, and a plethora of interactive features (i.e., shake to change car colors, etc.) can be used to engage mobile consumers.

General Motors' Buick brand has delivered mobile advertising with the richness of a TV spot using Millennial's interactive video ad. The interactive buttons layered over the ad allowed consumers to directly engage with Buick via social media, their mobile website and more. Buick's ads represent a best-in-class example of how to leverage mobile advertising to engage target consumers.

Campaign Spotlight: Buick LaCrosse

GOAL:

Create an eye-catching mobile video campaign to build brand awareness around the new Buick LaCrosse.

STRATEGY:

Leverage two separate videos showcasing the new Buick LaCrosse. Use interactive buttons on the screen during the video to allow consumers to instantly replay the video, go to the Buick Facebook page or Learn More by visiting the mobile-specific Buick site. Buick's agency, Starcom, worked with Millennial Media on the media strategy to generate brand awareness and secure direct consumer response.

"Mobile has become a critical channel for Buick, and traffic to our mobile site is exploding. The interactive mobile video campaign was a chance to show off the Buick LaCrosse in motion, while still giving users the opportunity to engage with the ad."

~ Craig Bierley, Director, Advertising & Promotions, Buick/GMC at General Motors



To download the full campaign summary, visit www.millennialmedia.com/campaign-summaries

Conclusions

Consumers who access automotive content on their mobile devices tend to be young, affluent males between the ages of 18 and 34, though females still represent a significant proportion of the mobile auto intender audience.

Among this audience, the frequency with which they access mobile automotive content is incredibly high. Usage trends are similar among consumers in the U.S., Europe, and Japan, though U.S. and European mobile auto users are more likely to engage with this content daily than their Japanese counterparts.

Automotive brands were early entrants to the mobile advertising space, and their use of mobile to achieve a variety of goals continues to grow. While auto advertisers most frequently feature product launch/release campaigns and drive increased foot traffic to dealerships, they also use mobile to build brand affinity and awareness at scale. Through the use of targeting techniques and engaging ad formats, automotive advertisers make the most of mobile to ensure they achieve their brand goals.

Top 10 Action Items for Automotive Brands

- 1** Build your mobile website and promotional pages with the consumer's experience in mind. Your audience is mobile and they expect a seamless experience while interacting with your brand on their mobile device.
- 2** Reach every possible target consumer. Millions of consumers are still browsing the mobile web on feature phones. Media plans and mobile sites should perform across all device types, operating systems/platforms, and carriers.
- 3** Make an impact. Mobile is an efficient and impactful channel for reaching your audience at scale. Take advantage of the opportunity to go big by reaching consumers on mobile.
- 4** Think beyond auto sites. Auto intenders browse numerous content channels. Don't exclude potential consumers by defining your campaign parameters too narrowly.
- 5** Take advantage of mobile's ability to target. Enroll your engaged users into custom audiences so that you can target auto intenders and communicate with them in the future. Doing so ensures you are reaching hand-raisers and qualified prospects.
- 6** Communicate with locally-relevant messages. With mobile, you can buy on a national scale and deliver customized creatives on a local or regional basis. Be sure to deliver ads that will resonate with local consumers.
- 7** View mobile as a CRM channel. Mobile advertising is not just about acquisition, but also about engaging consumers post-purchase and building brand loyalty. Invest in maintenance apps and drive downloads and usage.
- 8** Integrate with other media. Include QR codes on print ads, direct mail, and in-dealer collateral to easily connect prospective and existing customers with your interactive channel. Mobile can be the centerpiece of your integrated marketing program and can deliver you more intelligence about your programs.
- 9** Leverage existing creative. Re-purpose existing TV ads to create mobile interactive video ads that deliver high-impact, high-emotion campaigns.
- 10** Clearly define success metrics and stay on message. Measurability comes from focusing users on a clear call to action that aligns with your goals.

Would you like an in-person briefing of this data, specific to your brand or client?

Contact us today at research@millennialmedia.com.

Summary & Reporting Methodology

About Millennial Media

Millennial Media is the leading independent mobile advertising and data company. As an independent company, Millennial Media commands an impressive share of the mobile display advertising market. The company's technology, tools and services also power some of the largest companies in the media business today. Millennial Media is committed to growing the mobile advertising marketplace by becoming the preferred partner to all advertisers seeking to reach mobile consumers, all application and media developers seeking to maximize ad revenue, and all mobile operators seeking to further monetize their networks. Millennial Media was named one of the top 75 fastest growing private companies in America by the Inc 500. Visit <http://www.millennialmedia.com> for more information; and join our Facebook community, follow us on **Twitter at @millennialmedia** or subscribe to our YouTube page at <http://www.youtube.com/user/millennialmediavideo> for exclusive videos. Mobile developers can visit <http://developer.millennialmedia.com/> to learn more about monetizing their apps.

About comScore

comScore is a global leader in measuring the digital world and the preferred source of digital marketing intelligence. Through a powerful combination of behavioral and survey insights, comScore enables clients to better understand, leverage and profit from the rapidly evolving worldwide web and mobile arena. comScore provides syndicated and custom solutions in online audience measurement, e-commerce, advertising, search, video and mobile and offers dedicated analysts with digital marketing and vertical-specific industry expertise. Advertising agencies, publishers, marketers and financial analysts turn to comScore for the industry-leading solutions needed to craft successful digital, marketing, sales, product development and trading strategies.

Report Methodology

The insights here are based upon a study we commissioned with mobile measurement firm, comScore, and our own network observations across thousands of mobile ad campaigns.

comScore Methodology:

Behavioral activity through June 2011

Mobilens Survey Q2 2011, n=40,000

Plan Metrix Mobile Survey Q2 2011, n=15,000

Millennial Media Network Data:

The 2011 S.M.A.R.T.™ report data featured is based on actual campaign and network data from Millennial Media. The Scorecard for Mobile Advertising Reach and Targeting (S.M.A.R.T.™) delivers monthly insights on key trends in mobile advertising based on actual campaign and network data from Millennial Media, Inc. Millennial Media partners with major carriers, media networks and top-tier publishers to deliver the largest data set of any third-party U.S. mobile advertising network. As such, we are uniquely capable of reporting and analyzing the richest sets of carrier, device and campaign data collected over billions of monthly ad requests. Elevating and driving the whole mobile ecosystem forward is central to our company mission.

Visit www.millennialmedia.com/research to sign up to receive Millennial Media-related news, including Millennial Media's Mobile Mix™, the Scorecard for Mobile Advertising Reach and Targeting (S.M.A.R.T.)™ report, other issues of the Mobile Intel Series, and special reports.

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