

Stephen Upstone  
CEO and Founder LoopMe Media  
MMA UK Chairman



1) **2014 The year of the Tablet.** The UK already has the highest tablet penetration in the EU5\*.

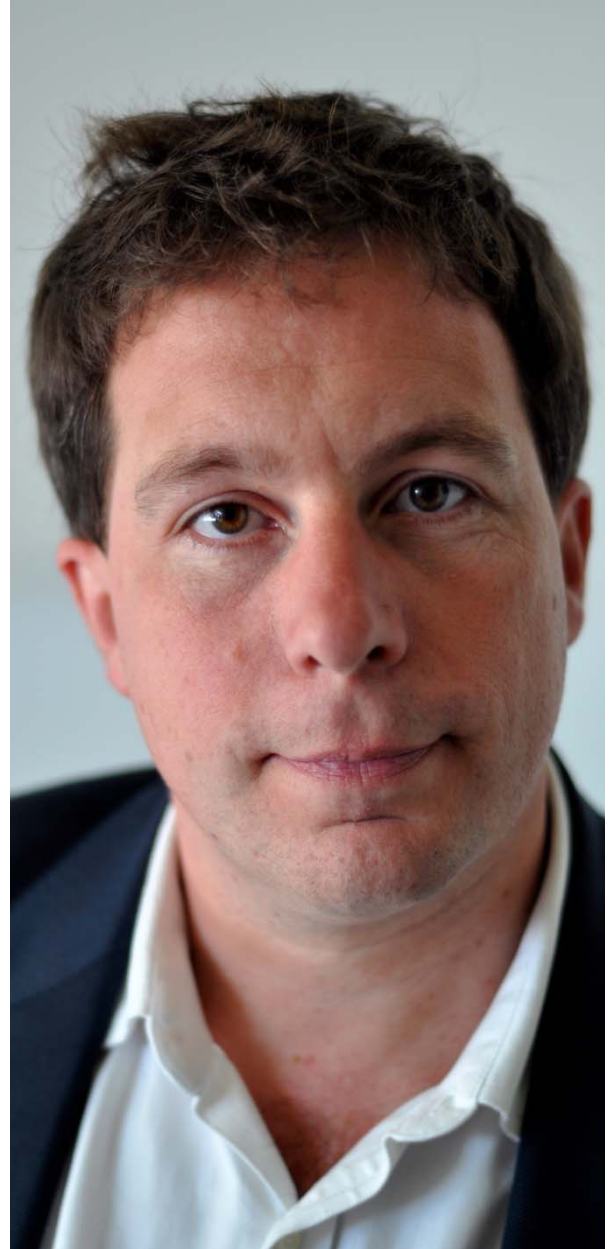
In 2014 consumers time spent and the activities they make on tablet will broaden creating strong opportunities for brand and performance advertisers.

2) **Brands get serious about mobile gaming.** Mobile gaming is already bigger than social media with 70% of the time spent on tablet and 30% of the time spent on mobile\*\*. Arguably playing games on mobile is one of the largest media events to happen to consumers since the TV arrived in homes. Brands will start to take advantage.

3) **Mobile advertising becomes social.** Advertising has always been content that must inform or entertain, now it must also be good enough to be shared or liked.

4) **Mobile ad spend doubles, again.** In markets of exponential growth all the disruption happens late in the market development e.g. as 20% of UK digital ad spend is set to double to 40% of digital ad spend. 2014 will see one of the most transformative years with big winners and big losers.

Sources - \*ComScore, \*\*Flurry”



Simon Birkenhead  
Director Global Advertising Sales  
MMA UK Vice Chairman

*Telefonica*

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“2014 will be the year that the industry comes full circle and media agencies realise they will be unable to take full advantage of digital & mobile without in-house creative, content, production and analytics teams.

Programmatic media buying will continue to grow at a rapid pace, taking an increasing amount of 'premium' inventory and improving its effectiveness through the addition of rich, deep mobile data. We will begin to see television ads being bought and distributed through real-time ad serving platforms, and brands will finally regard mobile as a must-have, mainstream channel for every campaign they run.”

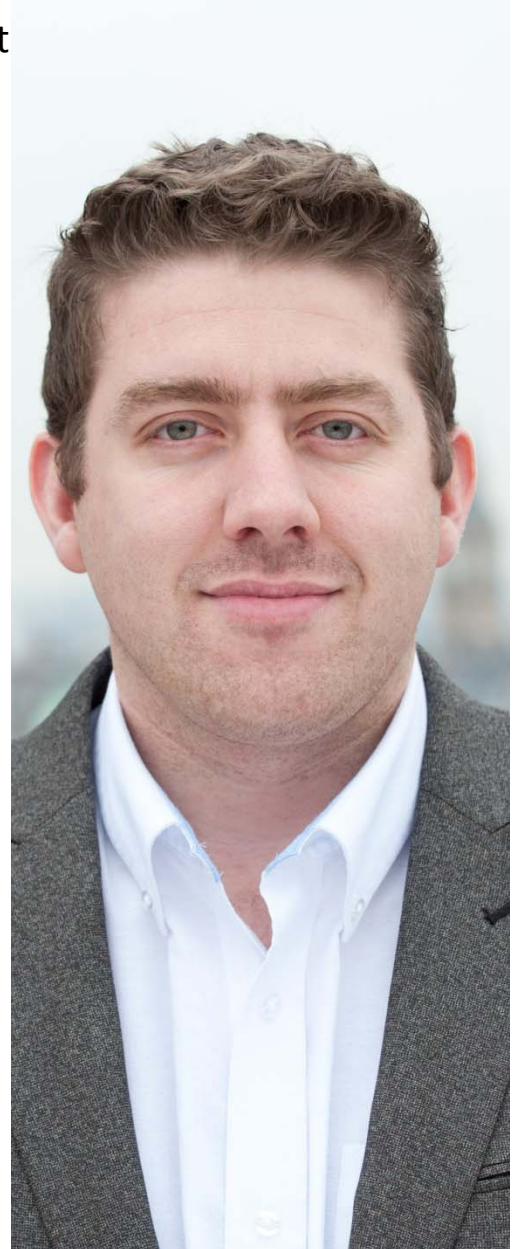


“In 2014 advertisers will look to use increasingly rich data sets in order to target their ads to the most relevant customers. Audience, behavioural and contextual data will allow advertisers to see exactly who the user is, what they are doing, and where and how they are doing it. With this in mind I think the three key mobile trends for 2014 will be....

**Better creative executions.** When you know so much about a user and their context, you can serve a super relevant message and creative. This will drive far greater engagement and response rates. Video is going to see massive increases next year, and should form a key part of mobile strategies; it is a fantastic way of delivering your message to your target audience.

**Cross-device attribution.** Understanding your customer journey is becoming ever more important and complicated. To truly understand the impact of your advertising, you must track your users across devices. Targeting is going to be increasingly important here as well. To ensure budgets are spent wisely, consider the connected consumer from a device-neutral position.

Finally, I think that 2014 will see the emergence of **hackers and fraud** on mobile. As we store growing amounts of personal data on our devices - everything from dating to banking - the opportunities for fraudulent behaviour increase and the potential gains to be made skyrocket. We will start to be far more conscious of our most personal devices and demand improved protection and security.”



Pratick Thakrar  
Managing Director  
Imagine Mobile

*imagine* MOBILE

## “1. Rise of Tablets becoming the first screen

- Tablet penetration is expected to reach 50% in 2014 and with cheaper, but more than capable devices, coming into the market, we expect the tablet device to become ‘the first screen people turn to’. With more content being consumed via the tablet device, brands have a huge opportunity to own the environment and deliver both brand and DR messages in a single environment.

## 2. Growing impact of Responsive design

- The app versus html5 debate has raged for a few years now but with app retention rates, and more importantly time spent within an app, dropping brands will look to responsive design techniques to deliver better user experiences.

## 3. Impact of NFC trials

- QR codes seem to have stalled, but like SMS, should still be considered as part of the mobile marketing mix, however, trials are under way to introduce powerful NFC experiences via print or OOH advertising. We expect simple executions early 2014, to pave the way for enhanced mobile experiences later in the year.”





James Connelly  
Co-Founder and Managing Director  
Fetch



“In 2014, we will hopefully see the definition of mobile evolve and broaden. We will be differentiating between smart and non-smart devices. Today, the smartest consumer machines are smartphones, desktop computers and laptops. Everything else, from TVs to toasters, is not as smart in comparison. What’s going to change in 2014 is the widespread proliferation of wirelessly enabled machines that are connected to the smartphone as the central hub. More devices will go mobile, hence changing the current definition of the mobile. Smartphones will increasingly become the ‘mothership’ that controls everything else.

In terms of OS, 2014 is unlikely to see a clear contender for third place. The current OS marketplace is dominated by Android and iOS, and this will continue to be the case. HTML5 is making a comeback, so things should look interesting for Windows and Blackberry in that fight for third place in the ecosystem. The likes of Tizen, Mozilla and Jolla are all running on Open Source Platforms – this means not only will they create more competition for Windows and Blackberry, but their Open Source Platform will drive down costs of smartphones.”



Alex Klose  
Head of Marketing  
IMIMobile



“Mobile is going to continue to spearhead the digitalisation of many aspects of our lives, empowering consumers to continue to choose which brands they want to engage with.

In 2014 I believe that:

- The divided customer channel experience will become the omni-channel experience.
- Mobile strategy and service optimisation will have a greater impact on revenue generation.
- A customer’s loyalty will be won on mobile.

Any marketer already knows that mobile achieves greater engagement with customers, delivers increased ROI, better open rates and marketing effectiveness than any other channel. However, brands that put mobile at the centre of their customer experience And stay adaptable to the development of mobile technology will succeed in 2014.”

Stephanie Griffiths  
Director of Mobile  
Wunderman



“Versat-aisle shopper:

The battle between online and high-street retailers is ending as brands create retail experiences that flow naturally between home and store, street and aisle, mobile and market.

It is inevitable that only this brand of retail will be demanded by the Versat-aisle Shopper ever more stridently in 2014 and beyond.

Point-of-sale is an elaborate process - not a unique moment in real time.

Mobile will play a massive role in creating seamless experiences.

Mobile will have to be integrated in store as people will compare prices, check testimonials/ratings and ask advice to their social network

And of course retailers will have to mobilise their digital presence as more and more users start shopping on their desktop while eating their sandwich at the office, keep on checking items on their smart phone while travelling and might decide to buy on their tablets at the end of the day while watching TV on their sofa – Sequential Screening is redefining the way we shop.”

George Dixon  
Mobile Manager  
Mediacom

**MEDIACOM**



“Mobile is cementing its position as the screen we have the most regular connection with. With an average of 150 checks each day, it is very much our first screen.

Brands and Agencies are beginning to really understand their audience engagement with the platform and in turn how to use this insight to amplify their campaigns. As we make a better use of data, from their behaviour, to their location and interests, our campaigns are becoming smarter.

2014 will continue to see fantastic examples of mobile centric campaigns, where mobile helps us deliver further engagement, connecting other media channels and sitting at the heart of our marketing strategies. But 2014 will require us to step change our thinking once again as wearable tech begins to gain scale and we work to unlock the potential this offers.

Another exciting year ahead for the industry.”



Mick Rigby  
Managing Director  
Yodel



“With big tablet sales anticipated this Christmas, we expect to see an increase in app downloads across both our publishing clients and the market as a whole going into 2014. However in an increasingly saturated market, app owners will continue to face really big challenges in helping their potential customers find their apps. We predict App Store Optimisation will be absolutely key next year, getting your apps set up and searching correctly is vital.

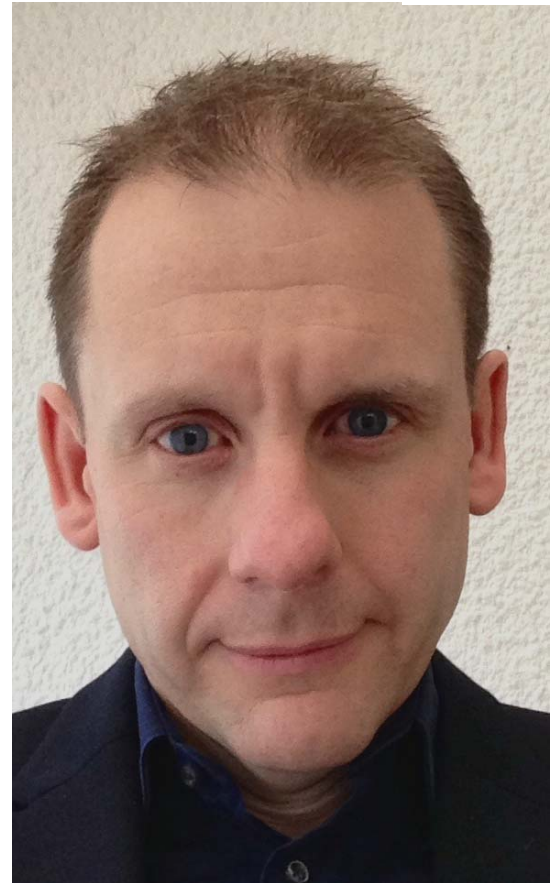
Going beyond discovery, 2014 will also see a shift in focus towards engagement with apps already downloaded. We anticipate a big demand for re-engagement strategies including retargeting customers as well as communicating to them in a targeted, timely and appropriate way via push notification messaging to encourage them to use their apps.”



Paul O'Grady  
Senior Communications Planning  
Manager, Marketing Services



“As investment in mobile increases the focus on ROI and path to purchase are going to be the key debating points for the industry. We know consumers are spending their time with mobile but cutting through and connecting with the audience at the ‘moment of truth in the consumers journey’ is going to be top of the agenda for brands.”



Hesham Al-Jehani  
Product Manager Mobile  
comScore



comSCORE.

“Tablet adoption will continue to accelerate in 2014 as more models across a gamut of specs and price points hit the shelves. PC share of online traffic will continue to wane and be displaced by ever more mobile consumption. Hence, mobile exclusive access to online sites, apps and services will become the norm for a growing number of consumers. What’s more, device consolidation of the connected living room will occasion more second-screen experiences from broadcasters; TV companion apps will gain more traction and the major brands will experiment with more creative second-screen campaigns.



Mobile commerce transactions will make increasing headway also. Moreover, bricks-and-mortar retailers will be better equipped to embrace the omni-channel consumer as they understand better how they behave across devices at home, en-route and in-store and will not shy away from the growing tribe of showroomers. Use of digital coupons, payment apps and proximity marketing will help drive footfall. So, far from sounding its death knell, 2014 will demonstrate that high street retail is alive and well for those that can adapt to the rapidly changing landscape laid bare by the mobile digital era.”

Chris Minas  
Managing Director  
Nimbletank



“2014 will bring with it a new era of open platforms to challenge the current monopoly in the mobile landscape by corporate players. A new generation of open source mobile operating systems, devices and partnerships will develop in Asia and the developing world which WILL impact the European market at some point in 2014.

Mobile web will become even more of a priority, with still only 30%-40% of websites mobile optimised in 2013, 2014 we will see even more urgency from brands to get mobile ready. SME's and B2B business too, will realise they need to adapt their businesses to the world of mobile and need to do it quick or risk closing the door to their mobile customers.

In 2014 the retail sector will put mobile at the heart of their industry, evolving mobile and consumer experiences faster than ever before. From providing an "always connected" customer view, tying together out-of-store to in-store customer journeys, dynamic pricing, one to one relationships and everything else in between, mobile will be the glue that will drive retail into a new era of customer engagement. 2014 will see the convergence of several major factors such as the UK roll out of 4G, Wifi becoming more available in-stores, in-store engagement through iBeacon or other connected technology, digital wallets and mobile loyalty. For the first time mobile can deliver on its long awaited promise and will be the enabler of a better, smarter, more effective shopper, consumer...user!!”



Stephen Jenkins  
Marketing Director EMEA  
Millennial Media



“In 2013 audience targeting and creative excellence were two of the big mobile trends for advertisers. Both will remain high on the agenda for 2014, alongside two new focuses of measurement and programmatic. What ties these together is data. Specifically, the rich audience data that only mobile can generate compared to online disciplines, where measurement and programmatic practices are more established.

In tandem with specific audience targeting data, new forms of measurement will see marketers looking to real-world metrics as they track how mobile is driving consumers to specified actions such as foot traffic to a specified point of purchase.

“Finally, mobile media buying will benefit from increased efficiencies as marketers embrace programmatic buying to target consumers. In this environment, scale and the ability to leverage high quality 1<sup>st</sup> and 3<sup>rd</sup> data more precisely is critical. For brands, the challenge is not simply to understand the importance of this data, but how it can be turned into actionable customer insight.”

