mma mobile marketing association

Off Portal – An Introduction to the Market Opportunity

JUNE 2007

Abstract

This Off Portal Backgrounder serves as an information-rich introduction to how the off-portal mobile channel works and how it has become an increasingly important contributor to growth in the mobile data market. This backgrounder is designed to be read by newcomers to the mobile data industry, especially by brands, publishers and developers building mobile services into their interactive strategies. This document also provides an extensive glossary of the terms most commonly used in the mobile content industry.

This backgrounder provides a succinct summary of how the off-portal market works for industry executives and investors, and it identifies some of the challenges to growth. It captures some of the latest research into momentum and value of this sector of the market and will be of interest to industry players looking at how the future value of mobile data will be generated.

Highlights include:

- An average of 400% growth in the dollar value of the off-portal business over the last 12 months

- Over 2,000 common SMS short codes in use, an increase of 84% over the past 12 months

- Greater use of the mobile Web (WAP) by mobile content providers and mainstream internet brands

- An estimated $750 million in 2006 off-portal revenue in the U.S. market alone

These data points highlight the enormous and growing potential for off-portal mobile content, positioning it as a significant accelerator to future growth. In producing this backgrounder, we identified a paucity of well-researched data on the off-portal market. This backgrounder identifies all sources of data, some of which was collated from MMA members for this report. Samples from two recent consumer surveys are included at the end of the document.

Through the Mobile Marketing Association (MMA), we intend to build a fuller picture of how this market is developing. We want to encourage market researchers to focus on this sector of the mobile market to produce measurements that will help to monitor the business and more rigorously quantify the opportunity for content providers targeting mobile users.

We also hope to standardize terminology. "Off-portal" is an odd phrase, defining itself only as "not on-portal." "Direct-to-consumer" better communicates the benefit of the distribution model, but in the end we stuck with off-portal because it highlights the most obvious operational characteristic of these services: that their success does not depend on carriers pre-loading the services through their branded portal, or "deck." Finally, the geographical focus for both the research and the content delivery models discussed in this backgrounder is the North American market.

Off Portal Content Special Interest Group

Introduction

Consumer demand for dynamic mobile content continues to grow in the U.S. market (IDC 2007). There are ample opportunities for brands to leverage mobile technology to create a pervasive and personal consumer experience. This document explains the opportunities for content owners and distributors to reach consumers directly through their mobile devices. It also addresses the origins and current state of mobile services delivered "off-portal," identifies a few areas where best practices can be encouraged and provides a glossary of terms to help developers and brands navigate the space.

This backgrounder includes the following sections:

- Off-Portal Mobile Services – The Market Today

- Opportunity & Growth

- From Content to Consumer

- Drivers for Future Growth

- Who We Are & Off-Portal Team

- Glossary

Off-Portal Mobile Services – The Market Today

Consumer interest in using mobile phones for entertainment, information and communication has seen staggering growth worldwide over the past two years. In the United States, there were 229 million wireless subscribers at the end of 2006 (IDC), or more than two-thirds of the country's population. (In some European countries, wireless penetration is above 100%). U.S. wireless customers also are using their phones for more than just talking: for example, messaging usage grew 98% during the first six months of 2006 compared to the same period in 2005 (CTIA).

The mobile industry, spearheaded by the network operators, has invested heavily to stimulate market growth through the provision of desirable phones, sophisticated network infrastructure, affordable rate plans, point-of-sale education and customer care. Operators initiated the first content-based services, made easily available to their subscribers through self-contained portals (or "decks"), effectively home pages for the mobile Web.

The opportunities provided by this level of investment have now opened up to a wider audience of phone users and to many more "content providers," which are the companies that ultimately sustain consumer interest in using a mobile phone for its multimedia capabilities.

Today, the appetite among content providers for interaction with customers through their mobile phones is higher than ever, each month seeing new content brands entering the mobile market. Just as in the early days of the PC Web, where users initially experienced the on-line world through a safe portal (e.g., Yahoo, AOL, MSN) before venturing out to find interesting and relevant sites and services directly, we are now starting to see increasingly wide browsing behaviour amongst

mobile users. For example, 50% of all U.S. users who can access WAP services now also browse outside of the carrier's deck (source: MMA Off Portal Committee phone survey of U.S. carriers, November 2006).

This end user activity is increasingly channelled to the consumer outside of the operator portal. These two channels to market – pre-loaded and marketed through an operator portal, or marketed directly to the consumer by the brand itself – are complementary drivers to the overall growth in mobile data usage. In the vast majority of the "off-portal" services, the carrier infrastructure is used for access and billing, making it simple to market mobile services to consumers and providing a simple and transparent end user payment experience. The differences are that the carrier does not bundle the service into the pre-loaded portal, and the marketing is managed directly by the content publisher. The revenue generated by off-portal services in the U.S. during 2006 has been estimated at $750 million (Chetan Sharma Analyst Group, October 2006).

More than 40% of mobile game downloads, 29% of all full-track music downloads and at least one-third of all ringtone purchases are made off deck (Telephia, 2007). For example, almost half of Sony BMG's 2006 digital music revenues came from mobile distribution channels, equal to approximately 5% of the group's total music revenue. Of this, about 30% comes from off-deck channels (SonyBMG, reported in RCR, January 2007).

To date, the most obvious discovery method for off-portal services is the common (cross-network) short codes, which users access using the mobile text message capabilities of their phone. For more information about short codes, see the "From Content to Consumer" section, as well as the MMA Short Code Primer, available at www.mmaglobal.com/shortcodeprimer.pdf. Common short codes enable users to interact using SMS as an entry point into content and services provided by parties other than carriers. Phone users then pay for the content on the basis of monthly subscriptions and one-off purchases, which are charged directly to their mobile phone bill. The main services powered by common short codes today are in entertainment (e.g., ringtones, wallpapers, games), news alerts, voting applications (e.g., American Idol, Deal or No Deal), contests, sweepstakes, search and community applications such as text chat. In addition, there is a growing interest from enterprises to use short codes as a way to push information to employees or customers in a secure manner.

Although the main surge in short code usage happened between 2004 and 2005 (298% growth Sept. 2004 – Sept. 2005, CSC Administration), growth has continued in the past 12 months as more brands enter the market (84% growth Sept. 2005 – Sept. 2006, CSC Administration). Today, common short codes are the only ubiquitous and approved cross-carrier method of marketing off-portal content, reaching almost every mobile subscriber.

Opportunity & Growth

Why Use the Off-Portal Channel?

The off-portal "channel to market" is attractive for a number of reasons:

1. It brings more brands and services into the market, providing greater choice and increasing usage opportunities for phone users.

2. It provides a route into the market for more specialized and niche content providers that cannot access the market through carrier portals.

3. Brands of all sizes can invest marketing dollars into campaigns featuring a single call-to-action that works for practically all mobile users.

4. Consumers can enjoy the same mobile services across multiple carrier networks.

5. Content providers can leverage their Web sites to drive mobile usage.

6. The value of mobile search marketing and advertising increases the more that the mobile user base can be addressed as a single market.

7. It gives brands greater control of the product offering and proposition.

8. It enables brands to clearly differentiate from their competitors through innovative marketing.

For these reasons, much of the recent growth in the mobile data market has been initiated and driven by brands launching direct-to-consumer campaigns, using off-portal methods of marketing and delivery.
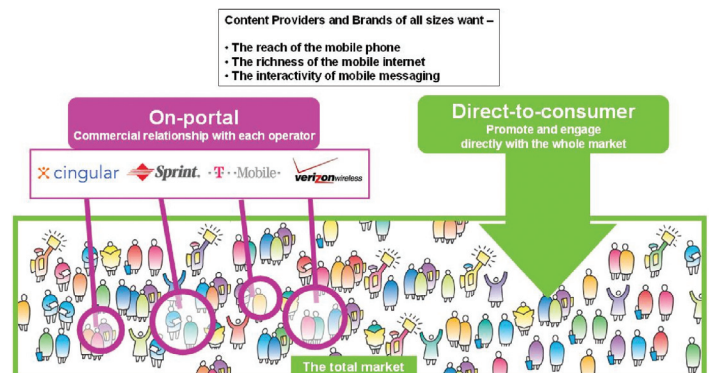
Source: Source: Bango, 2006
Figure 1

This trend can be seen by growing numbers of brands entering the mobile market for the first time, by the number of new campaigns being launched and by brands that previously operated exclusively through carrier portals now broadening their access to the market through off-deck sites containing a range of mobile content targeted at their customers. Brands that have launched mobile Internet sites include Burger King, Orbitz, Maxim, USA Today, Coca-Cola, GM and The Wall Street Journal.

In an October 2006 Webinar on the off-portal mobile market and mobile marketing, FierceWireless asked 144 participants about how they were using the mobile Internet to create a mobile presence.

39% 34% 27%
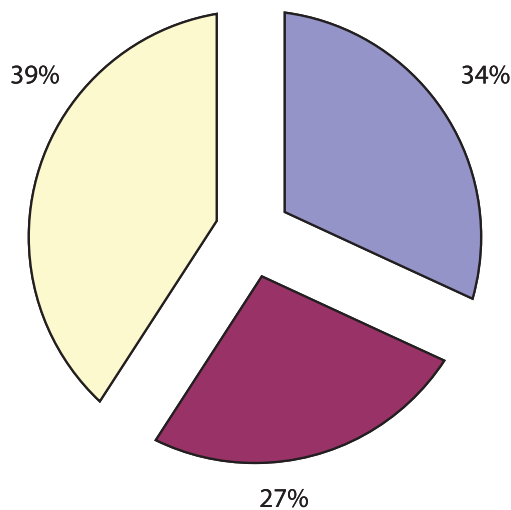
➡ Have had a WAP site for over 12 months

➡ Have had a WAP site for less than 12 months

➡ No WAP site, but planned within 12 months

Source: FierceMarkets, Bango Inc., Oct 2006
Figure 2

As one measurement of involvement in the mobile marketplace, this data suggests considerable activity during the past 12 months, with many more brands anticipating launching sites during the next 12 months.

The off-portal market is enjoying more intensive focus from the industry at large, both in the United States and elsewhere in the world. In more established mobile markets such as Japan, there are more than 80,000 off-portal sites on NTT DoCoMo's i-mode network alone (NTT DoCoMo, November 2005). In some European markets, notably the United Kingdom and Germany, off-portal data revenues contribute up to 70% of content revenues (Vodafone UK, February 2006).

In the United States, the companies that enable these off-portal

services – the technical enablers of direct-to-consumer services and content aggregators – have also experienced significant growth in their businesses over the past 12 months. This growth is another indicator of the increasing significance of the contribution of this channel to the mobile data industry.

The MMA Off-Portal Sub-Committee conducted a member survey in October 2006 to understand more about the levels of growth experienced by the leading players in off-portal content delivery. The survey aimed to quantify the levels of growth over a year, particularly to provide insights into how quickly the market is growing in the U.S. market. One key finding: **Between September 2005 and September 2006, the average growth in off-portal revenues across six leading providers of off-portal services was 410%.** [1]

From Content to Consumer

Life in the off-portal market began even before premium rate SMS became available. For example, some early pioneers marketed ring-tones that were paid for by calling premium-rate IVR numbers. Calling these numbers billed the incoming line account $2.99/minute, during which a PIN code was read out to the caller, which could then be sent as part of an SMS message. The content provider received the message and delivered a simple ringtone back to the phone via SMS. It is likely that, through the use of workplace phones, employers unwittingly subsidised the very first examples of the mobile content business.

The arrival of SMS messages sent from a machine to a handset (Mobile Terminated – MT messages), which could be charged at premium rates to the mobile subscriber phone bill, was the catalyst for the off-portal market to take off in a big way. Consumer interaction was further simplified by the provision of special, short phone numbers called short codes, which typically are five-digit numbers that subscribers on any network could send a text message to for a fixed cost.

Today, specialist intermediary companies known as aggregators take the complexity and cost out of providing these messaging-based services, so that the businesses that market mobile services can reach customers on any carrier without the need for direct network integration. The existence of these aggregators, or technical enablers, gives access to the mobile marketplace a wide base of content providers and developers and is fundamental to the future growth of the market. Figure 3 illustrates where aggregators and other companies fit into the mobile marketing ecosystem.
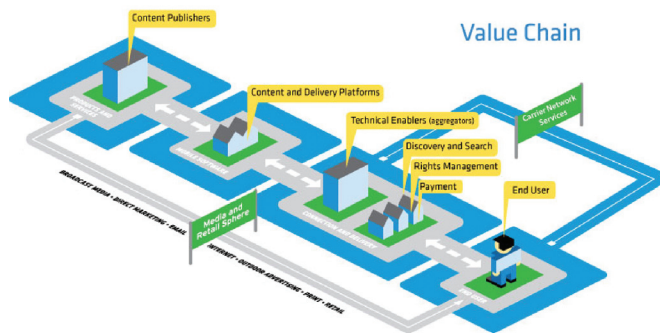

Understanding the Value Chain Source: Singlepoint Inc.
Figure 3

The range of services delivered off-portal continues to grow. Today most commercial chat services through mobile run off-portal, the vast majority of TV- and radio-based mobile interaction (e.g., voting for American Idol contestants) now use cross-network common short codes. The emergence of mobile content targeting specific demographics and other niche audiences is also predominantly an off-portal play.

Multimedia Messaging Service (MMS) is also emerging as a technology for getting content to consumers across multiple carrier networks, using the common short-code discovery and billing method. It has found particular value as a method for getting "teaser" content into the hands of consumers – such as music, animations, video and other application files attached to the message - that can be pushed to a user's handset as a way of promoting a product or service. Often the message will embed a link to download the full application or access the complete on-line service, once the user has sampled the teaser.

To reach its potential, MMS must be more widely available and more reliable than today. Research estimates that fewer than one third of U.S. users have a device that is MMS- ready and that about 20% of them have used their handset's MMS features (SmartTrust 2006).

Other techniques are being developed to drive users to mobile services, including the mobile internet through direct URL access, search, ad banners and viral marketing. Brands are also directing traffic from their PC Web sites to their mobile sites, where the traffic can be more easily monetized and additional customer service can be provided 24/7. (Figure 4 shows one example). That said, only about half of consumers are aware that they have the ability to browse from a mobile phone (Forrester, 2006), suggesting that the industry can do a better job of communicating the benefits of a mobile device.
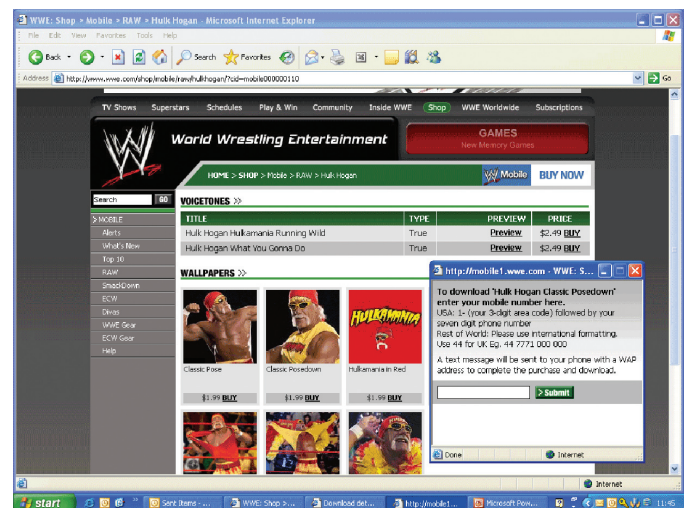
WWE uses its web site to drive mobile content sales
Figure 4

Business Models for Off Portal

As discussed in the previous section, the mobile off-portal market began by selling made-for-mobile content to phone users. Monetizing the value of digital content that can be downloaded or browsed from the handset – so-called "premium content" – is still the most common means by which a mobile site creates revenue today.

The best "conversion rates" (the number of users accessing premium content who then elect to make a purchase) are achieved when the content fees are added to the user's phone bill. This carrier billing model works equally well for post-paid and pre-paid customer bases. In the off-portal world, the costs of using the carrier to bill the end user are generally lower than in the on-portal world, but the content provider must take responsibility for marketing its services.

The kinds of services that are most frequently commercialized in this way include:

Mobile entertainment (Browse/Purchased Content)
+ ringtones, wallpapers
+ games
+ video

Alerts (Pushed Content)
+ news
+ horoscopes
+ sports

Community-based services (Interactive Content)
+ chat

Voting (Interactive Content)
+ TV show

Recently the off-portal market has nurtured a number of mobile services that are supported through ad funding. This model works well when the core business is based around advertising revenues, such as print media, television and brands that can secure co-marketing deals.

There is some expectation that in-game ads will be viable as a mobile business model, but this approach is largely untested. Content providers must be mindful that the mobile screen makes it harder for users to "see beyond" advertising, increasing the risk that highly intrusive advertising will de-motivate consumers from mobile interaction.

For some brands, the goal is improved marketing presence and/or an investment in customer service. For example, airlines use mobile Internet sites to allow fliers to check on flight status, plan routes and even check in to flights from a cell phone. Figure 5 provides a few examples.

Brands use the mobile sites to sell content, monetize ad space and to provide better customer service to mobile users
Figure 5

Drivers for Future Growth

Interest in using mobile phones to offer content and services is attracting new entrants to the market each month. The continuing consumer demand underlines the appeal of mobile services, to brands but at the same time is a growing "stress point" in the off-portal model. We anticipate continuing growth in the creation of off-portal sites and campaigns. However, to ensure long-term growth, the industry will need to streamline the processes that third-party brands must go through to launch mobile services.

The Short(code)est Route to Market?
Most off-portal services are marketed behind an SMS short code to enable end user access to the service. Most carrier networks can support premium services billed via an SMS short code, with direct-to-account (or WAP billing) starting to appear on some carrier networks to reduce customer care costs. For any brand considering the multiple ways of generating mobile traffic, using a short code is a "must do" and should be a quick and easy route to market.

The goal here is "short code ubiquity." Any printed article, product package, TV program, advertisement or billboard is a potential starting point for a mobile campaign. For example, a billboard could include a short code in order to encourage passers-by to get information on the spot instead of simply providing a URL and hoping that they'll remember to visit the site later on, such as from a PC. Short code ubiquity will be achieved by making it simpler to purpose, and repurpose a code for multiple mobile campaigns to extend the effectiveness of the marketing investments made by brands in promoting these cross-network short codes.

In part, this goal will be achieved by sensible consumer protection. It is essential for consumers to feel confident enough to try new services with their mobile phones knowing that it costs little or nothing simply to look. The MMA *Consumer Best Practices[2]* publication makes a vital contribution to standardizing the delivery of mobile services to the end consumer. For example, it mandates procedures to ensure that consumers are fully informed about the commercial "contract" for any charge-able services they select, or for explicit consent to receive marketing messages to their mobile phones.

In part, short code ubiquity will also be accelerated by streamlining the management of active short codes. In particular, a faster time-to-market can be achieved by expanding the boundaries within which the content provider/aggregator may re-purpose a campaign behind a new short code. This applies equally to a new campaign that is substantially similar to an existing campaign so that it can be automatically launched behind an existing short code.

[2]Available at www.mmaglobal.com/bestpractices.pdf.

Information = Marketing Power

Brands rely on accurate monitoring and reporting to minimize the risk of the investments they make in launching and marketing their mobile services. Big brands require timely and accurate information about the traffic and transactions that off-portal services generate. This real-time reporting gives the brands the knowledge they need to continue to support the programs with additional marketing dollars.

The ability of brands to leverage direct-to-consumer mobile marketing depends on an industry prioritization of the accurate and timely provision of information for off-portal services, especially around billing events, refunding consumers and uncollectables. This kind of data empowers third parties to plan future investments by relying on revenue predictability and to manage customer support cost-effectively. We believe that more timely and more accurate data generated from traffic and billing activity is vital to insure the healthy future growth of mobile services delivered directly to the consumer.

Search and Advertising

Today, the great majority of searches on mobile devices are for mobile content, ranging from ringtones and music to games, applications and images (Yahoo). Although much of this demand can be satisfied through on-portal content downloads, off-portal content search will give subscribers the opportunity to expand beyond the carrier's content catalogue, particularly to locate niche and specialist content.

Operators are starting to use the off-portal search opportunity to their benefit in a couple of ways:

1. Subscribers will see the ability to search beyond the operator's portal as a natural feature of a quality search solution. Initially this will be a differentiator for the operators that adopt this strategy early and in a user-friendly way.

2. The opportunity to target subscribers with additional keyword and targeted advertising generates a new stream of revenue from search and advertising results beyond the operator's on-portal content ecosystem. Off-portal content search is a treasure trove of behavioral, profiling and preference data that can be used to improve the relevance of search results and optimize the operator's on-portal content to track new trends and interests expressed by the customer base.

We believe that over the next 12 months, mobile search will develop beyond the basic "find a ringtone" function it serves today, to equal and then pass PC-based search on the Internet. Users will start to look for brands, services and locations through their phones, with the added benefit of producing results that are highly relevant to mobile users and can even be optimized by a combination of factors, such as location and time of day.

In parallel to the expanding role of mobile search, advertising is starting to emerge as a way of enabling easier access to off-portal services. The primary focus today is to find the high traffic locations for mobile users – notably operator portals. In the United States and Europe, a number of operators have started to offer limited amounts of ad inventory to selected third parties, sold on a cost-per-click basis.

Third party specialists in ad-serving technology, sometimes doubling as ad sales houses, have quickly appeared, enabling operators to outsource the technology and/or the ad sales. Beyond the operator portals, a number of brands with popular Web sites have also achieved high traffic levels through their mobile sites and are an additional source of inventory. As a revenue-generating model for off-portal sites, ad sales works particularly well for brands whose business is already predicated on advertising revenues, such as publishing and broadcasting.

Further growth of this opportunity depends on increasing inventory, stability and clarity in the cost of mobile ads and the ability to provide advertisers with detailed performance analytics. The mobile channel can deliver exceptional consumer targeting to advertisers. For example, it offers close control over the level of marketing investment and the unique ability to target consumers with the right offer, at the right time and in the right place.

Marketing and the Use of Promotional Mobile Content

Mobile is an exciting opportunity for marketers, providing a pervasiveness that no other platform can match and a degree of personalization that opens up great possibilities for getting to consumers at just the right time, with just the right message.

Because the mobile device has evolved from solely a communications tool into a communications tool that is also an interactive media player, imaging device and Internet browser, mobile content has become a valuable customer acquisition and retention tool for brands. Content offered to consumers routinely includes games, applications, text, audio, video and images. Figure 6 illustrates a few examples.

Subaru of America promotes its brand by offering free wallpapers to fans of its cars
Figure 6

One of the most proven and reliable methods of getting consumer attention and encouraging them to engage with a brand, or to try a product, is through the use of "promotional" or "free" stuff (i.e., goods, services or content). There is no better hook for getting consumers attention and securing their permission to receive additional marketing than the word "free."

As in most business models, the economics of "free" work only if used as an entrée to a service or product offering with a "downstream" revenue-generating model, and only when the cost is free or at least very low. The key for promotional mobile content is that it performs exactly that task; it promotes a service that can be monetized in some way. For promotional content that subsequently drives users to pay for content, it is important that consumer trust is established; meaning that a "free" or promotional offer that is linked to revenue conversation (based on a subscription or unique transaction for content) is clear and explicit about the offer and subsequent charges to the consumer.

There is a growing level of interest in the potential of promotional mobile content amongst brands, such as in the Fast Moving Consumer Goods (FMCG) sector. These brands, by definition, already market directly to consumers, so an effective off-portal channel is fundamental to their success in mobile.

To maximize effectiveness from the mobile channel, brands will need to:

- Achieve uniform access to their customers across multiple carrier networks and devices.
- Have easy access to information about variations in media support across different kinds of phones.

Complexity in both of these areas means that currently there are comparatively few examples of mainstream brands using the mobile channel for promotional purposes. Although the case for brands to touch consumers through their mobiles is straightforward to make, leveraging the mobile opportunity needs to be made clearer.

Locating the Consumer

Mobile connectivity can provide information about where a user is at the time that they seek a service or information. This can have time-critical relevance, such as calling a 911 service, or parents maintaining track of their children. More commonly, it enables service delivery to be made location-relevant for the consumer – and means local businesses getting significant additional value from advertising to mobile users in their vicinity.

Although provision of location know-how is an FCC mandate, access to a user location via their mobile device is also tightly controlled by the carrier, and requires explicit user consent. Control is particularly important when it applies to younger users of mobile phones.

As in all other areas of mobile service delivery, the ability for location information to be simply and usefully deployed off-portal depends on operators providing consistent and standard access to the technology across multiple networks.

Unlocking the Mobile Internet

Content providers are increasingly using mobile Internet technology, typically using the WAP standard, to deliver content to their customers. There are a number of reasons for brands to exploit this technology:

1. A rich brand presentation, and "Web-like" content experience, can be presented through a browse-able WAP site.

2. Users can spend more money per visit to a site containing multiple content purchase opportunities, increasing the potential return on customer acquisition.

3. The browse-and-buy model clearly separates content discovery from billing, delivering a more transparent and reliable payment experience to the consumer. For all services, in particular automatically re-billed subscriptions, this model puts control into the hands of the consumer rather than the vendor.

4. "Browse-and-buy" is the model adopted by carriers for on-deck content, so it is trusted by subscribers.

5. Content providers can accurately target the users and devices that work for their content. This dramatically reduces the number of users who are "billed but unfulfilled."

6. Users return to sites unprompted – for example, by book-marking sites they like, or by a friend sending a link – increasing the return on marketing.

7. Traffic-generating technologies such as search and mobile advertising can be leveraged to improve the effectiveness of marketing.

8. Content providers can actively manage and add to the content they provide to their customers, keeping the offer fresh and relevant.

Conclusions

The off-portal mobile content market is a vibrant and vital part of the mobile data economy. The marketing benefit – reaching mobile users everywhere, irrespective of their network of choice – is a strong argument for brands to "go direct" and to incorporate mobile services into their marketing campaigns.

Common, cross-network SMS short codes have provided the first route to a unified customer base. Engaging users through the mobile

Internet expands this opportunity by ensuring global reach and the potential for mobile phones to connect everyone to everything. The range of technologies available through the mobile channel enables the pervasiveness of mobile to be enhanced by a level of personalization unavailable through any other platform.

The off-portal mobile market is a rapidly evolving and competitive market today, giving content providers and brands a wide choice in technologies and partnerships for engaging with customers through their phones. This opportunity is available equally to creative start-ups and the world's biggest consumer brands.

If the North American market grows in the way that mobile content markets in other major geographies have, it is likely that the majority of content revenues billed by network operators will be generated from the sales of off-portal content, while brands will invest hundreds of millions of dollars of marketing to target their customers through mobile services.

This is a healthy outlook for the industry. The off-portal model means that the burden of attracting phone users to mobile services can transfer from network operators – which have initiated the market – to the brands, developers and publishers that will maintain consumer interest in mobile services over the long term.

It is a future that benefits from the collaborative impact of the long-term investments of network operators, the routes to mobile users provided by competitive and innovative technology companies and the creativity and marketing know-how of content providers and brands.

Table 2: U.S. USER ACTIVITY					
	Oct 2005		Oct 2006		
	Subs (M)	% Subs	(M)	% Subs	Growth Subs
Used text	58.0	32.0%	75.0	38.7%	29.3%
Browser	17.2	9.5%	22.3	11.5%	29.7%
Used photo	15.5	8.6%	29.1	15.0%	87.7%
Purchased ringtone	15.7	8.7%	17.5	9.0%	11.5%
Personal email	12.1	6.7%	17.1	8.8%	41.3%
MM	10.3	5.7%	14.2	7.3%	37.9%
Work email	6.6	3.7%	10.2	5.2%	54.5%
Wallpaper	6.4	3.5%	5.9	3.0%	-7.8%
D/L Game	5.3	3.0%	6.8	3.5%	28.3%
	181.0		194.0		
Media Metrics October 2006					

Table 1: Recent Analyst Data on Mobile Consumer Behavior				
	UK		US	
	Have Service	Used Service	Have Service	Used Service
SMS	98%	95%	38%	20%
MMS	79%	65%	34%	20%
WAP	80%	56%	9%	5%
Movie Player	22%	17%	12%	5%
Music Player	29%	21%	12%	6%
GPRS/EDGE	58%	42%	12%	5%
Source:SmartTrust Mobile Trends 2005/06				

Table 3: Getting Content to Market					
High Level Overview of US Cross-Carrier Mobile Content Models					
Mobile Content Sale Option	How is Mobile Content Discovered?	How is Content Delivered?	How is Content Billed?	How is offering compliant with MMA CBP?	How is offering compliant with CTIA Mobile Content Code?
Operator Portal aka "On Deck"	End User views Mobile Operator Deck	Via Mobile Operator over Internet	Via Mobile Operator	Operator monitors	Operators have agreed not to offer 18+ rated content via operator deck or CSC (i.e. that they bill for) until Age Verification System (AVS) is in place
CSC	End User responds to Call To Action by texting a common 5 or 6 digit code	SMS, MMS or WAP Push/ Download	Via Mobile Operator	CTIA-selected Content Monitoring Entity to operate by 2Q07	Operators have agreed not to offer 18+ rated content via operator deck or CSC (i.e. that they bill for) until Age Verification System (AVS) is in place
WAP/WAP Push	End User responds to Call To Action by clicking on either a standalone URL or an internet link embedded in an SMS msg.	Via Mobile Internet	Via Mobile Operator	Dependent on individual Brands/content owners/3rd parties	No 18+ content available as of Q1 2007
Codes	End User responds to Call To Action by dialing a * or # followed by 3 to 5 additional digits in order to reach an IVR	Via Mobile Internet or MMS	TBD	CBP governance by mid-2007	TBD
Mobile Search	End User navigates to search engine, enters search criteria and sifts through desired results	Via Mobile Internet	Via Mobile Operator or 3rd party billing for unapproved services	CBP governance by mid-2007 for services billed via carrier	No 18+ for content billed via operator, otherwise same level of protection for minors as currently available with ISP-based search
Mobile Content Sale Option	How is Mobile Content Discovered?	How is Content Delivered?	How is Content Billed?	How is offering compliant with MMA CBP?	How is offering compliant with CTIA Mobile Content Code?
Source: Neustar 2006					

Who We Are

About the Mobile Marketing Association

The Mobile Marketing Association (MMA) is the premier non-profit global association that strives to stimulate the growth of mobile marketing. The Mobile Marketing Association is an action-oriented association designed to clear obstacles to market development, to establish guidelines and best practices for sustainable growth, and to evangelize the mobile channel for use by brands and third-party content providers. MMA members include agencies, advertisers, hand-held device manufacturers, wireless operators and service providers, retailers, software and services providers, as well as any company focused on the potential of marketing via the mobile channel. The Mobile Marketing Association's global headquarters are located in the United States.

Off Portal Content Special Interest Group

The Off Portal Content Special Interest Group, chaired by Bango, has been established to discuss a set of common standards for cross platform/application user experience standardization, content value chain standardization, content management, and quality of content.

The Off Portal Special Interest Group developed this backgrounder in collaboration with MMA member company representatives from:

Off Portal Content Special Interest Group Members:	
Alltel Wireless	New Motion, Inc.
Bango	OpenMarket
Blue Frog Mobile	Openwave
Buongiorno	Opera Telecom USA
Cascada Mobile Corp.	Playphone
Cellfish	QMobile Inc.
Cingular	Quickplay Media
Cricket Communications	Remote Knowledge Inc.
Dennis Digital	R/GA
Distributive Networks	Rhythm New Media
Dynetic Mobile Solutions LLC	RuleSpace LLC
Flycell	OpenMarket
Funmobile	SinglePoint
Gameloft	Soapbox Mobile
Jamster	Sprint
mBlox	Sybase 365
Medio Systems	T-Mobile
m-Qube	Third Screen Media
Mobile 365	Thumbplay
Motricity	VeriSign
mTLD (.mobi)	Zingy, Inc.
NeuStar	

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References

The following links provide additional sources of information and reference:

- MMA Consumer Best Practices Guidelines (http://www.mmaglobal.com/bestpractices.pdf)
- Mobile Marketing Association website (http://www.mmaglobal.com)

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Glossary of Terms

The MMA maintains a nomenclature glossary for all terms within MMA guidelines, education documents and research. The glossary is available at http://www.mmaglobal.com/glossary.pdf

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The Mobile Marketing Association (MMA) is the premier global association that strives to stimulate the growth of mobile marketing and its associated technologies. The MMA is a global organization with over 450 members representing over forty-two countries. MMA members include agencies, advertisers, hand held device manufacturers, carriers and operators, retailers, software providers and service providers, as well as any company focused on the potential of marketing via mobile devices.