

Contests of Power and Place: Advertising and the ‘Complicated Mobile Phone Ecosystem’

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Abstract¹

Mobile media, especially mobile cell phones, are now seen and heard everywhere, forming an intrinsic part of the daily lives and habits of billions of people worldwide. Curiously, despite this wide diffusion and remarkable rate of adoption, as an advertising platform the cell phone is, in the words of one commentator, still very much “a mass medium waiting for the kiss of life”. This paper examines why this is the case, by exploring the ‘complicated mobile phone ecosystem’ and, in particular, the convoluted and at times tense relationship between the mobile operators, content providers, advertisers, handset manufacturers, and other commercial interests. It also examines the role of 3G technology in reshaping these relationships, and the importance of place for marketers’ visions of 3G-enabled mobile advertising.

Introduction

Mobile media, especially mobile cell phones, are now seen and heard everywhere, forming an intrinsic part of the daily lives and habits of billions of people worldwide. Driving this wide diffusion has been a remarkable rate of adoption. In the space of just over two and a half decades of commercial availability, the mobile phone, or cell phone, has overtaken the fixed line telephone and outstripped the internet in terms of new connections (Goggin, 2006, p.1). For instance, to cite US research, since autumn

¹ This paper is an output from a program of research under ARC Discovery – Project, DP0556419, ‘Globalisation and the media in Australia’, funded 2005-2009. The authors gratefully acknowledge the ARC’s financial support.

2001 there has been a significant levelling off in the number of North Americans who use the internet (Rainie & Bell, 2004, pp.44, 47). In contrast to this, worldwide mobile phone connections are growing exponentially. Global mobile connections stood at 426 million in 2000, with predictions that this figure will have risen to over three billion by the end of 2007 (Philipson, 2006).

Given this rapid rise of mobile phone adoption and ownership, where does this leave advertising? One might reasonably expect such phenomenal growth to result in the mobile phone being the global marketers' advertising medium of choice – especially when combined with reported declines in the advertising revenues of established media, notably free-to-air TV (Creamer, 2007). To date, however, any explosion in mobile media advertising – that is, advertising placed on mobile handsets or targeted to mobile phone users – is yet to eventuate. Rather, as one commentator puts it, the mobile phone is still very much “a mass medium waiting for the kiss of life” (cited in “Mobile marketing pitfalls”, 2006, Lara Sinclair section, ¶ 1). That is to say, it is a ‘sleeper’ advertising medium, an emerging advertising market with an enormous potential which is still far from being realised (O’Shea, 2007).

This paper examines why this is the case, by exploring the factors that contribute to the rather hesitant adoption of mobile advertising. It does this through a meta-analysis of mainstream media and the advertising trade press. Study of this material is supplemented by drawing on a number of critical studies within the available research literature on the subject.

The paper is primarily concerned with surveying the obstacles and opportunities for the development of advertising in the evolving and “complicated mobile phone ecosystem” (Stone, 2007, ¶ 18).

The obstacles impeding the development of mobile advertising are numerous and complex: “clunky technology, slow networks and expensive, complicated pricing” structures are all recognised hindrances (Sainsbury, 2006). Also important to note here are the significant challenges associated with managing unsolicited messages (spam) and overcoming consumer resistance to these advertising appeals. With respect to unsolicited advertising messages, Christina Spurgeon (2008, p.95) notes,

given that “it is estimated that spam account for between 60 to 80 percent of internet traffic”, and “because email is now such an important business communication tool, spam threatens to compromise economic productivity significantly”. In the US alone, for example, “the cost of spam in terms of lost productivity in the US alone has reached US\$21.58 billion annually” (Claburn, 2005, ¶ 1). As Spurgeon warns, spam “could have similarly dire consequences for cell phones.” For this reason, cautiousness would seem to prevail for all concerned. On the advertising side of things, advertising agencies, the companies they represent, and the mobile operators, are all extremely sensitive about alienating consumers by inundating them with unwanted advertising appeals: the agencies do not want to risk losing their clients, the companies do not want a brand or product backlash, and the mobile operators do not want a consumer revolt and migration to their competitors. On the consumer side of things, fear of spam, in combination with the widely held judgement that the mobile phone is “the most private medium there is” (Deign, 2006, p.34), forms a key reason for consumer reluctance in accepting mobile advertising messages. Underlying this sense of caution is an ongoing tension between the rights of the consumer and “the regulation of data protection” on the one hand, and “commercial practices to maximise advertising via mobile technologies” on the other hand (Cleff, 2007, p.263). For mobile advertisers, the peril is that “any commercial message, particularly an unsolicited one”, has the potential “to be deemed intrusive, met with suspicion and, quite possibly, ignored” (Deign, 2006, p.34). As Spurgeon (2008, p.100) puts it, “while they are extremely keen to gain access to this intimate personal space, there is also a shared understanding that, unless access is based on a clear invitation, direct marketers could very probably kill the mobile golden goose”. Thus, balancing the tension between the ‘right to privacy’ and the ‘right to advertise’, and overcoming consumer resistance to mobile advertising, has proven and continues to prove to be particularly challenging hurdles for mobile advertisers to negotiate.

A further key facet of this ‘complicated ecosystem’, and the principal focus of this paper, is the convoluted and at times tense relationships between the mobile operators (the telcos who provide the mobile services and handle the billing), the advertisers, the content providers, the handset manufacturers, and other commercial players. These relationships influence all facets of mobile marketing efforts and are a crucial factor in explaining the hesitant adoption of mobile advertising. The paper then goes

on to examine the role of 3G technology in reshaping these relationships, and explores the importance of place for marketers' visions of truly lucrative 3G-enabled mobile advertising.

It should become evident that although the identifiable groups of players in the system might share in common an interest in fostering the growth of mobile telephony, each of them has their own rationale for seeing that growth happen, and their own different commercial purposes which they are seeking to achieve. In particular, the telcos and handset manufacturers on the one side want to expand the market for their services and hardware without the consumer turn-off which they fear would result from allowing advertisers and their agencies, on the other side, to have unlimited access to mobile customers, however cautious the marketers too may be in reality. Content providers are caught in between, wanting to commercialise their assets, but again, to do so in a way which does not provoke consumer resistance. Thus, as well as being wary about consumer reaction, these various interest groups are anxious about each other, not to mention their competitors in the same group. That is, there are fundamental conflicts between and within the interest groups involved, and it is really these conflicts which are preventing the full realisation of the potential of mobile telephony as an advertising medium. These particular contests of power are examined in more detail below.

Corporate control and content provision

Mobile operators have long been reluctant to make their services available to advertisers and other commercial interests. As one commentator puts it, "Carriers have an intimate relationship with customers that they want to protect, given that wireless users tend to associate their cell phone experiences with their provider, regardless of the source [of the content customers may access via these devices]" (Shields, 2005). In addition to minimising the amount of unwanted content (spam), there are clear commercial benefits in preserving this control, including, to name the most obvious, a captive audience and the lion's share of the revenue. It is not surprising, therefore, that so many of the carriers' key commercial strategies have worked to maintain and further strengthen this control. In the US, for example, it has long been standard practice for operators to deliberately "hobble" their phones "to make flight to a competitor difficult, if not impossible" (Stross, 2007, ¶ 3). More

recently, however, consumer dissatisfaction (along with the growing influence of wireless net neutrality debates) has led the FCC in the US to work towards loosening the grip of carriers by demanding universal handset standards and provision for greater consumer freedom and mobility (Levins, 2007). In Europe, meanwhile, phone companies have been making forays into other forms of digital media ownership by investing in internet protocol television (IPTV). The aim is to function as a one-stop-shop for digital service provision by offering consumers “triple-play” bill packages that bundle together TV, internet and telephone services (O’Brien, 2007). Strategic investments such as this have prompted some commentators to suggest that carriers may in fact become the next media companies in their own right (Cuneo, 2006).

The other key strategy long favoured by mobile operators to maintain control has been to secure the best available content for their own mobile portals in their “desire to boost revenues from data services” (Howarth, 2006, ¶ 3). This creates what are referred to as a series of “walled gardens” or “locked portals” which, through the provision of exclusive content, work to “keep their own subscribers in and others out” (Howarth, 2006, ¶ 4). It has been suggested that the walled garden model does hold some merit for an advertising channel still in its infancy, at least to the extent that it can ‘educate’ and protect novice consumers by allowing them to browse content freely without incurring ‘bill-shock’ (Howarth, 2006, ¶ 11).

The main criticism of this approach from an advertising perspective is that, once the medium begins to grow, the ‘walled garden’ will only serve to “stifle growth of content outside of those walls” (Howarth, 2006, ¶ 12). The risk for advertisers is that, if mobile operators stick with the ‘walled garden’ approach they are taking to exclusive mobile content, then “marketing messages will have to be content with taking a back seat” (“Mobile marketing pitfalls”, 2006, Lara Sinclair section, ¶ 1).

As a result of these attempts to maintain control by mobile operators, there is growing friction with other interested parties, all of whom want greater direct access to mobile consumers. In short, as the commercial value of the mobile advertising pie increases in size, so does the number of players wanting a slice of that pie. Content providers, advertisers and their agencies, and handset manufacturers, are all taking steps to better position themselves for a greater share of the global mobile media market pie. To give

some indication of market size, in the US, for example, the amount spent on mobile advertising for 2006 was said to be in the order of US\$421 million, with predictions that this will rise to around US\$4.8 billion by 2011 (“Clicks”, 2007), nearly half the predicted global advertising expenditure of \$US11.3 billion (Lester, 2006). In response to this expanding mobile market, some of the US’s biggest providers of free-to-air and subscription TV content are ‘repurposing’ their content for the mobile video market. In the US for instance, MTV Networks has made deals with Pepsi-Cola and Intel to sponsor MTV and Comedy Central mobile channels, while NBC Universal is planning to sell ads for its mobile video programming, including prime-time material like *Heroes* (Whitney, 2007a, ¶ 2). News Corporation’s Fox television network in Australia made a similar arrangement in 2006 by signing a deal with Toyota to sponsor a spin-off series of *Prison Break* specifically for mobile phones (Lehmann, 2006). Indeed, as one article notes, “in the two years since Fox Mobile and MTV Networks pioneered the market for cellphone programming, almost every major film and television studio is developing projects” (Holson, 2007a, ¶ 5), with Discovery Communications in the US among the more aggressive of these (Whitney, 2007b).

Meanwhile, advertising agencies are also active in developing their mobile strategies, with major British-based global advertising holding company WPP appearing to lead the way. In October 2007, WPP launched what it calls the Mobile Alliance, “a group that brings together more than 10 WPP-owned technology, media and creative advertising companies” in an attempt to “grow the nascent mobile advertising market” (Coleman & Canning, 2007).

Further, handset manufacturers are equally determined to increase their stake in the mobile ad market. These companies want their ‘content desks’ to be the destinations for mobile advertising, and, in the words of one commentator, are “doing everything they can to make that happen” (O’Shea, 2007, p.34). Nokia is a prime example, with the company moving into areas traditionally serviced by advertisers and content providers. In September 2007, for instance, Nokia acquired Endpocket, a US-based company that develops technology for viewing ads on cell phones. This move, it is argued, positions the handset maker “up against traditional online ad sellers” (Cuneo, 2007, ¶ 2). In other developments, Nokia is also launching its own digital music service (Pfanner, 2007a), relaunching a multiplayer gaming service (Stone, 2007), and

is increasing its involvement in locative media by acquiring map and navigational software maker Navteq (Holson, 2007b). Vodafone is also working to maximise its stake in the mobile ad market by setting up a company division “to push mobile phones as a marketing platform to the advertising industry” (Koremans, 2007, ¶ 1; Bryan-Low, 2006).

What is important to recognise, though, is that in each of the above cases, the motivation for greater access to mobile services and consumers by content providers, advertisers and handset manufacturers differs in key ways. For instance, for content providers, the interest in the mobile market is reported to lie in the medium as a “back channel or return path for broadcast media” (Spurgeon & Goggin, 2007 p.323). According to News Corporation’s News Interactive, “the mobile phone is really a tool to drive traffic around all our business properties” (cited in Nguyen, 2005, ¶ 10). For handset manufacturers, this means encouraging ‘on-deck advertising’ (in this case, advertising messages received and viewed directly on the mobile handset) and ‘value-adding’ through games and other device-supported applications. For advertising agencies, this means a slice of the revenue for ad creation and delivery. Lastly, for marketers, particularly large multinational corporations, the mobile phone appears to be valued primarily as a branding mechanism (Okazaki, 2005, p.178).

Despite these subtle differences in motivation, the overall desire for a greater slice of the mobile advertising pie is leading to mounting pressure on mobile operators. In the face of this pressure, operators are slowly – if rather reluctantly – giving ground and opening up their services to advertising. For the most part, this continues to be in the form of ‘off-deck’ or ‘pull’ advertising (that is, advertising messages which draw consumers to, or are accessed through, mobile websites outside of carrier portals). There are exceptions, however. In the US, for example, Sprint Nextel, Cingular and Verizon are all taking steps to open up their services to ‘on-deck’ (handset-based) ‘push’ advertising. In the case of Verizon, this is said to involve a two-tiered pricing structure, offering a premium rate without ads, or a cheaper, ad-supported service (Cuneo, 2006). This is just one example of mobile operators opening their services to advertising – a move due, at least in part, to the competitive strategies of content providers, advertisers, and handset manufacturers. However, the extent to which this emerges as a wider trend remains to be seen.

The promise of 3G: next generation advertising?

Having examined some of the key hurdles impeding mobile advertising, the final sections of this paper examine some of the opportunities. Examined in this section are two further, interrelated developments that have the potential to dramatically reshape the overall mobile advertising landscape and force mobile operators to soften their stance on mobile advertising. These are the introduction and increased uptake of 3G mobile technology, and associated improvements in interaction design and device capability, as well as the embrace of the ‘mobile internet’ by marketers and consumers as a result.

With mobile networks support for 3G, and with improvements in handset design and reliability that can “deliver the promise of 3G”, advertisers regard 3G technology as “an essential element to the delivery of engaging marketing messages” (“Mobile marketing pitfalls”, 2006, Lee Stephens section, ¶ 1). In short, this technology enables advertisers to move beyond text-based SMS messages, embracing an array of alternatives, from cut-down versions of television commercials, to mobile TV and video-on-demand, branded mobile content, and so on. The industry view is that, as mobile phones (like the Apple iPhone) merge into a single multifunction device – becoming “the Swiss Army knives of technology” (Story, 2007, ¶ 2) – they will also rapidly become “more subservient to advertising” (Cleff, 2007, p.263).

Fundamentally, 3G technology is about facilitating access, ideally at fast bandwidth rates, to a greater variety of content and content formats. In Australia, for example, the Telstra-owned search company Sensis claims that mobile phone users are “lapping up” its mobile internet services (Chenery, 2007, ¶ 1). The benefits of this for mobile operators are increased revenue through new subscriptions by those wanting to access this content, as well as associated revenue increases from data access and download fees. However, facilitating greater access to a range of content options and formats also poses significant longer term problems for mobile operators in that it creates a “whole new kind of mobile marketplace” (Levins, 2007, ¶ 3).

It does this in two key ways. First, 3G technology puts mobile media content squarely in the broader realm of digital content provision. This has the result of bringing the

mobile carriers into close proximity – and conflict – with some of the biggest global players in digital media, such as Google, Yahoo, News Corporation, and Microsoft (Helft, 2007a, 2007b; Shannon, 2007; “Google ads go mobile”, 2006). Each of these corporations has a number of mobile media strategies in place. In some instances, this has included deals struck in collaboration with mobile operators. For instance, Yahoo has “reached an agreement to feature its search engine on mobile portals run by Telefónica” in 15 countries in Europe and Latin America (Pfanner, 2007c, ¶ 1). Nevertheless, it is their sheer size and financial clout which positions these companies as the biggest long-term threat to the mobile operators’ present levels of control. One pundit already writes (rather melodramatically) of a “raging battle” that is “going to be war” between “the Web world and the wireless world for control of mobile advertising revenue” (Pfanner, 2007b, ¶ 8). Indeed, moves like AOL’s acquisition in 2007 of established mobile advertising network Third Screen Media (Sharma, 2007), and Publicis Groupe’s decision to share executive expertise with Google (Wentz, 2008), do lend some credibility to claims of looming conflict.

The second problematic aspect of 3G technology for mobile carriers is that increased access to the mobile internet, along with what one critic calls the “law of diminishing returns” for push advertising (Haig, 2002, p.32), provides advertisers with an attractive alternative means of interacting directly with consumers. In other words, the mobile internet (Web-based services accessed by mobile devices) means “content providers are turning away from mobile operator portals” and are “targeting mobile users directly instead” (Gray, 2006). In addition to overcoming the limitations on content imposed by ‘walled gardens’, the mobile internet gives both content providers and advertisers the ability to negotiate around carrier control and billing issues as well as interaction design problems (a significant issue for ‘push’ forms of advertising). It also enables greater user-led flexibility and access options for consumers. Given this flexibility, it is not at all surprising that the mobile internet is fast emerging as the most popular channel for mobile advertising in Australia and the US, with most global marketers and content providers operating ‘off-deck’ ‘m-sites’, as they have been dubbed.

Even so, the obvious potential and increasing embrace of 3G technologies and the mobile internet by advertisers and other industry players has not as yet translated into

a flood of mobile advertising messages and campaigns. Rather, caution continues to prevail for both advertisers and content providers. For advertisers, at least, this hesitancy is due in large part to more general challenges which attend and further complicate mobile advertising. For example, in developing mobile strategies, advertisers argue that there must be high bandwidth speed, simplicity of device interaction design (the very reason that the iPhone has been greeted with such enthusiasm by many marketers), simplicity of strategy, simplicity of execution, and simplicity of engagement for the end consumer. The “zero-one-two-three” approach encapsulates this: “zero manuals, one point of entry to the service, no more than a two-second response time and content that is no more than three clicks away” (cited in “The sell, sell, sell phone”, 2007, ¶ 4).

What is more, increased uptake of 3G technologies does nothing to obviate the need for advertising agencies and the corporations they service to pay close attention to market differences, especially when it comes to patterns of technology use.

When it comes to 3G subscription penetration, for example, there is substantial variation on a country-by-country basis. For instance, while it is predicted that between 50-60 percent of mobile phones in key European countries will have 3G handsets by 2010 (Forrester Research, 2008), figures for 2006 show that, as a percentage of total mobile subscriptions, there is at present significant variation within the region: 3G subscriptions account for 21 percent in Italy, 16 percent in Sweden, but only 11 percent in the UK, 10 percent in France, 8 percent in Spain, and 7 percent in Germany and the Netherlands (Von Abrams, 2008). By way of global comparison, 3G subscriptions, again as a percentage of total mobile subscriptions, stand at 53 percent in Japan, but only 4 percent in the US (Von Abrams, 2008). Similar discrepancies are evident with respect to SMS use. For example, Europe continues to constitute a thriving market for short messaging due to uniform standards, with over 75 percent of subscribers using SMS services (Gopal & Tripathi, 2006, p.3). In contrast, only 40 percent of US subscribers regularly use SMS, with 65 percent of all US mobile-phone usage reputedly made up of phone calls (McIlroy, 2007). This is to say nothing of the broader intra-market complexities that complicate all forms of advertising strategy, including manifold cultural and other demographic differences (Wilken & Sinclair, 2007).

Personal, portable, and potentially lucrative: location-aware advertising

Nevertheless, a further key promise of 3G technologies for mobile advertisers, and one that makes overcoming the above hurdles all the more desirable, is the possibility that these devices will permit location-sensitive one-to-one advertising communications. The prospect of one-to-one advertising communications using presence and context-aware systems has been described as “the Holy Grail” of advertising (cited in “On the radar”, 2006, ¶ 11). The reason is simple: it promises to connect the advertiser directly with an individual consumer at a crucial site of consumption: the point of purchase.

In Australia, tentative steps have been taken towards realising this goal by utilising the Bluetooth protocol (which enables proximate, similarly configured wireless devices to communicate with one another) for mobile advertising purposes. Preliminary tests have been carried out on transit buses in Perth, Western Australia (Alarcon, 2006), and by setting up ‘Bluezones’ in the food courts of select shopping centres, where advertisers can “market directly to shoppers via their mobile phones by delivering rich media content such as wallpapers, mp3s, videos or even vouchers” (“Connecting shoppers”, 2007, ¶ 2). For marketers, the key in both cases is a location that has significant “dwell time” – a crucial factor for mobile content consumption.

Some marketers are boasting of what can already be achieved with Bluetooth and related technologies such as so-called Quick Response codes (Parsons, 2007; Story, 2007) and “near field communications” (Walters, 2007). For example, the Australian-based mobile content provider HWW claims that, by combining “behavioural targeting” techniques and location-based services, they can find for their customers “somebody who is within an age range, and a demographic, with a source of interest that you want, who’s doing a specific thing at a specific time, and give them a message” (cited in “On the radar”, 2006, ¶ 8). The ultimate aim of such messages, in many cases, is in fact to pull the consumer into a “brick and mortar store” (Gopal & Tripathi, 2006, p.4). There is even talk of the mobile being used to “revolutionise media measurement”. By installing specific software, the device “can pick up audio signals that have been pre-encoded into the radio or TV broadcast the audience is currently watching or listening to” and these signals are then sent to a data centre for processing and statistical analysis (Nguyen, 2006, ¶ 3).

Again, however, despite the potential there is still considerable hesitancy amongst all parties due to the risk of overuse and spam and the fear that these messages will drive customers away. The argument is that, unless these messages are solicited (or at least, permission-based), and unless location-aware advertising is “carefully monitored and exercised”, it has the potential to become “an extremely intrusive practice” (Cleff, 2007, p.263).

This hesitancy notwithstanding, place continues to be regarded by some as “the most important concept” for mobile advertisers (Parsons, 2007, ¶ 6; Gopal & Tripathi, 2006, p.4). However, such is the overall enthusiasm with which location-sensitive advertising is talked about that much of this talk seems insensitive to the complexities of basic pedestrian mobility patterns (Whyte, 1988, pp.56-67; de Certeau, 1988, pp.91-110). It also seems insensitive to the socio-spatial complexities of much mobile phone use, many of which have been documented in the research literature (Wilken, 2005). These include the “softening of time” through “micro-coordination” (Ling & Haddon, 2003), and other behaviours which reveal a complex set of interactions and negotiations between place, physical co-presence and “virtual” presence (Ito & Okabe, 2005, pp.264-271) – or what Morse (1990, p.203) refers to as the “copresence of multiple worlds in different modes” experienced as an “ontology of everyday distraction”. These complicated socio-spatial interactions also include counter-intuitive uses of the mobile phone, such as where young South Korean mobile phone users “immobilize” (switch off) their devices in response to perceived sensitivities between peers concerning place, time, etiquette, and content (Yoon, 2003). All these examples highlight the complexity of place-based uses of mobile media. The key lesson in this for mobile advertisers, and for the design of location-sensitive devices and applications, is that “pure geographical location is rarely of users’ interest” (Arminen, 2006, p.322).

Conclusion

This examination of mobile advertising develops a fuller picture of what has been described as a “complicated mobile phone ecosystem”. From this examination, two key observations can be made that are significant for how we understand this ‘ecosystem’. The first of these is to note that the internet – in the broadest sense of a

worldwide, publicly accessible network of interconnected computer networks – remains a leading medium. This is despite statistics that show a plateauing of worldwide new internet connections, which contrast with rapid growth in new mobile phone connections. With the arrival of 3G technology, the mobile phone – at least from an advertising perspective – works increasingly as a kind of mobile ‘portal’ to connect consumers with the mobile internet, and thus, by extension, advertisers and content providers more directly with consumers.

The second key observation to make regarding the mobile phone ecology concerns the ongoing difficulties marketers face in negotiating the complexities of the medium, given their desire for increased simplicity. To a large extent, the hurdles facing mobile advertisers and impeding effective mobile advertising strategies can be seen as ‘structural’ and are not easily overcome. By structural we mean that the inherent conflicts and hurdles facing mobile advertising course through and underpin all facets of mobile media development and use – from interface design, service provision, and the complex socio-cultural and socio-spatial uses of mobile media, to the increasingly divergent content options that are opened up by 3G technology and ‘convergent’ devices like the iPhone. In addition to the above factors, as this paper has examined at length, are other factors, such as spam, consumer resistance to mobile advertising, and the ongoing importance of the convoluted and at times tense relationship between mobile operators (telcos), advertising agencies and marketers, content providers, and handset manufacturers, and the crucial if fraught role this relationship plays in shaping the present and future directions of mobile advertising.

What all this suggests is that mobile advertising will continue to be produced and consumed, both in established forms (such as via SMS), as well as in a variety of emergent forms which utilise 3G capabilities and access to the mobile internet. The overall global mobile advertising market will also continue to grow in size and value. However, so long as the hurdles detailed in this paper persist, the long-term growth and effectiveness of mobile advertising will be impeded. Until the debilitating effects of spam are effectively combated (if not defeated), until consumer resistance to ads dissipates further or is ameliorated through other means, and until the fundamental conflicts between and within the interest groups involved is resolved (which is unlikely in the short-to-medium term given the seismic shifts that continue to shape

corporate control of the digital media landscape), until these structural hurdles are addressed, the proverbial 'land of plenty' sought by advertisers could well remain a distant vision for some time, a promised land somewhere over the horizon. That is to say, without coordinated and systematic response to these issues, mobile advertising will likely continue to remain a 'sleeper' advertising medium, an emergent market with enormous nascent potential. None of this, however, is likely to discourage mobile advertisers from continuing to speak and write, with cautious optimism, of this 'golden land of opportunity' awaiting.

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