



2011 Charity Sector Report

Understanding Technology Needs

Issue 1

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Analysis by:

mobile^{SQUARED}

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Executive Summary

This report provides an analysis of the technology needs of UK charities. The report was produced by industry trade organisation, the Association for Interactive Media and Entertainment (AIME), with analysis provided by MobileSquared. Through greater understanding of the technology requirements of small, medium and large charities, AIME will work with its members to provide a co-ordinated cross industry strategy to support Charity Sector growth.

There are two key findings to be extracted from this piece of research.

1. There is a lack of knowledge and understanding by charities with regard to technology.
2. There is a general unwillingness to share knowledge and understanding among the charity sector.

These need to be tackled immediately, if the research findings included within this report are to be effectively applied. And these are:

1. There is a huge demand for education, and increased insight into how technologies can be effectively used by the charity sector.
2. The charity sector is overly reliant on the internet, which it says is ineffective.
3. The potential donation window is restricted by charities only applying internet-based initiatives, and they need to expand the focus to all internet-enabled devices, especially mobile, to ensure appeal is to the broadest demographic.
4. Charities need corporate sponsors to donate alternative technological capabilities, such as a mobile platform, to support income generation, engagement and efficiencies.
5. There is a need for a centralised knowledge resource to provide technological support, advice, contacts and case studies.

Introduction & Methodology

The AIME Interactive Services for Charities Forum* produced a survey to better understand the technology needs of UK Charities. The survey was broken down in to five areas; understanding of technology, engagement, income generation, concerns/issues and support.

The survey was distributed to small, medium and large charities via the CTT, FSI, Knowledge peers and AIME databases. It was also promoted via social media channels by CTT, CAF, Knowledge Peers, Raceonline2012, Small Charities Coalition and AIME. The survey was completed by a total of 368 charities, of all sizes, between 20th May and 21st July 2011.

AIME's Charity forum will conduct a similar survey annually to monitor the trends of the third sector using technologies. The results of the 2011 survey will be used to determine educational tools needed to support the third sector in using technologies to increase fundraising, engagement and efficiencies.

Who is AIME?

AIME is a UK based membership organisation representing and promoting the commercial interests of the interactive media and entertainment industry – where customers use their phones, televisions or computers to access, interact and pay for information, marketing or entertainment services using leading edge micropayment technology.

AIME's membership represents the entire value chain – from the providers of end user content to the networks and technical services that deliver and bill them to customers. Members include significant players such as BT, ITV, BBC, Vodafone and the largest independent service providers. We represent over 80% of the UK premium rate industry.

***AIME Interactive Services for Charities Forum**

Following the success of AIME's 2010 event 'Empowering the Charitable Sector with Interactive Technologies', an Industry working group was formed to support charities with their understanding and usage of interactive technologies for fundraising, engagement with stakeholders and internal efficiencies. Membership of the Forum is non-exclusive and members have agreed to pool collective technology experience to help all charities identify the most appropriate technology for them, as well as driving other market growth initiatives.

Forum members include charities, charity organisations, technology & service providers/operators and consultants (across online, mobile, fixed line and tv channels). AIME provides independent management of the working group activity.

More information

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UNDERSTANDING OF TECHNOLOGY

Q1 - Gauging personal understanding/use of technology

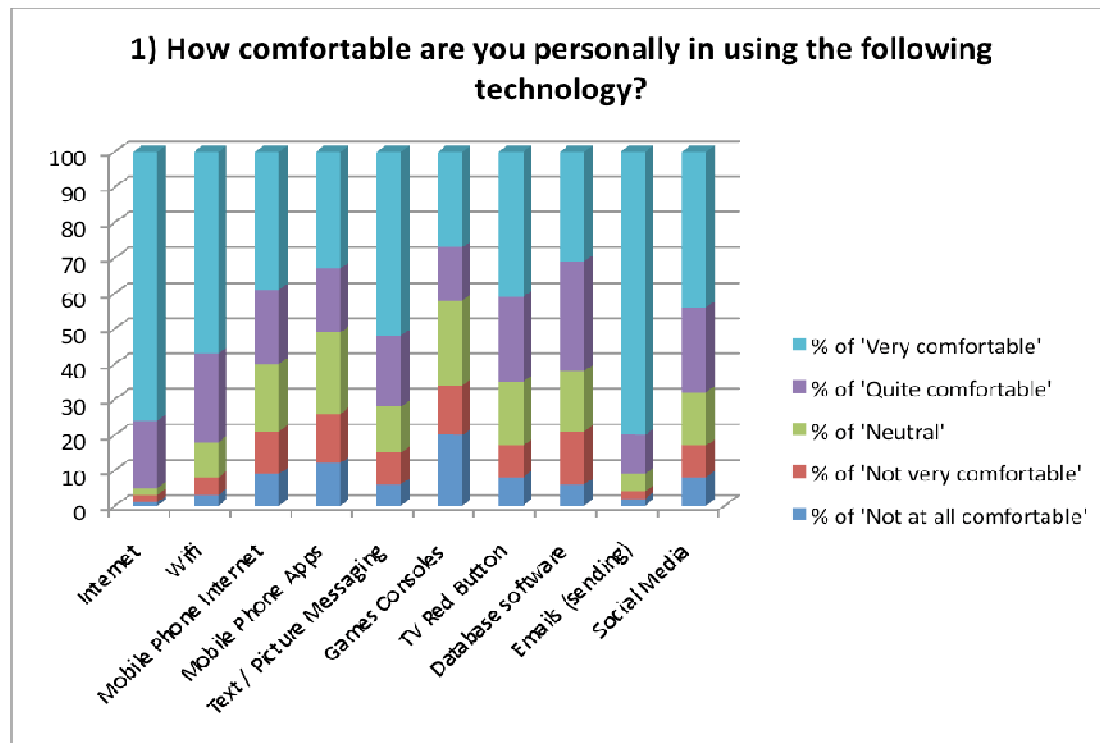
In total, charity respondents expressed almost 100% comfort when it came to the established technologies of email and internet, compared to around 70% for what can be labelled the second-generation of technologies (red button and text), and between 30% and 50% for the third-generation of technologies (mobile sites, apps, games consoles).

The data reveals that internet and emails are by far the most familiar technologies used personally by the charity sector respondents, with 76% and 80%, respectively, saying they were “very comfortable”, and an additional 19% and 11% claiming they were “comfortable”. In addition, charities have a great deal of comfort with Wifi.

The next technologies with a high comfort level among the charities were messaging and social media, followed by mobile web and mobile apps. There was a reasonably even divide concerning comfort for mobile internet and apps, with companies seemingly more familiar with the concept of mobile browsing than apps. The rise of social media can be attributed to the fact social media, and Facebook in particular, has become a critical extension of the internet.

Charities are least comfortable with games consoles, as an internet-enabled device, which is only a few percentage points behind the level of discomfort with mobile apps and database software.

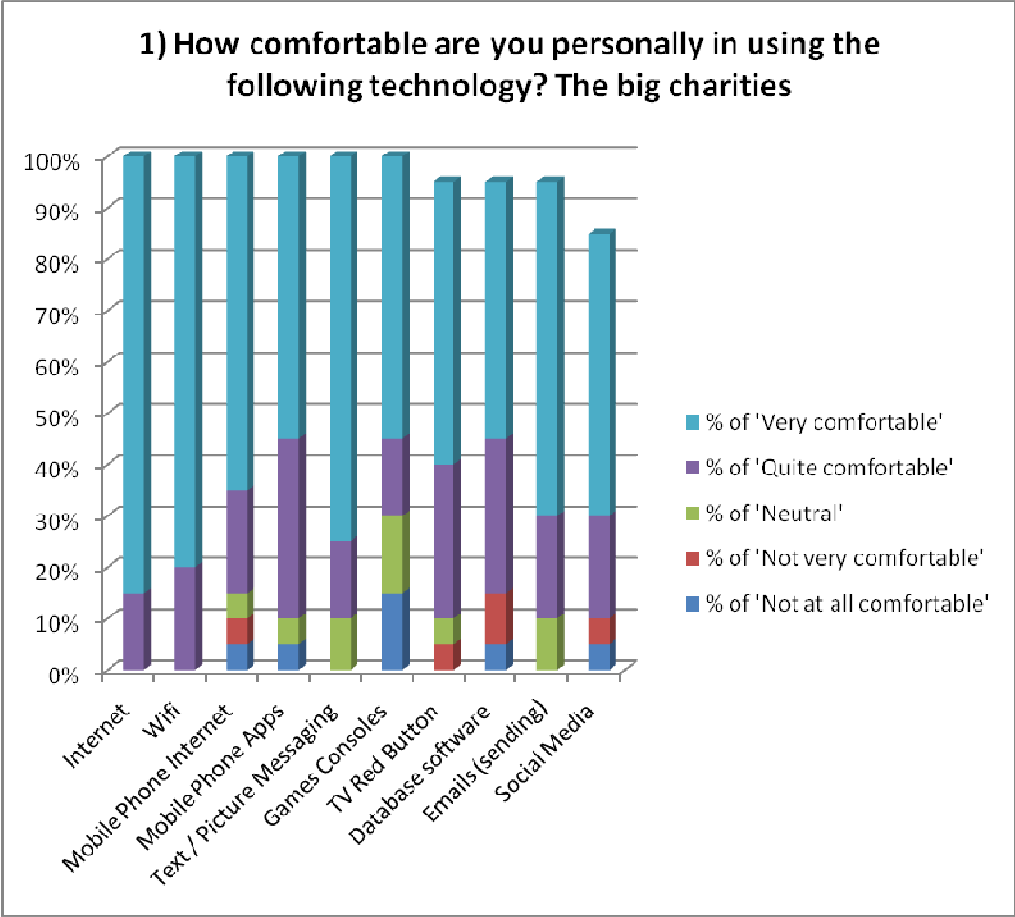
But a charity’s discomfort with technology will need to be overcome as potential donors use a variety of technologies. For instance, understanding how certain demographics, such as donors of a particular age, use particular technology, such as games consoles. A discomfort with a particular opportunity could ultimately mean a charity misses out on donors associated with that technology.



Source: AIME

There is a stark contrast in responses when only analysing respondents from the charities with an income of £5 million and over per annum. Clearly, there is significantly more comfort with the majority of technologies listed than the total charity population. The clear similarity is in the level of discomfort of games consoles, which does indicate that games consoles are one technology that raises the serious doubts as a technology applicable for the charitable sector.

As some of the largest charities in the UK, these are likely to be the early adopters of technology, and their comfort across the technologies bodes well for the smaller charities, as this level of comfort filters downwards.



Source: AIME

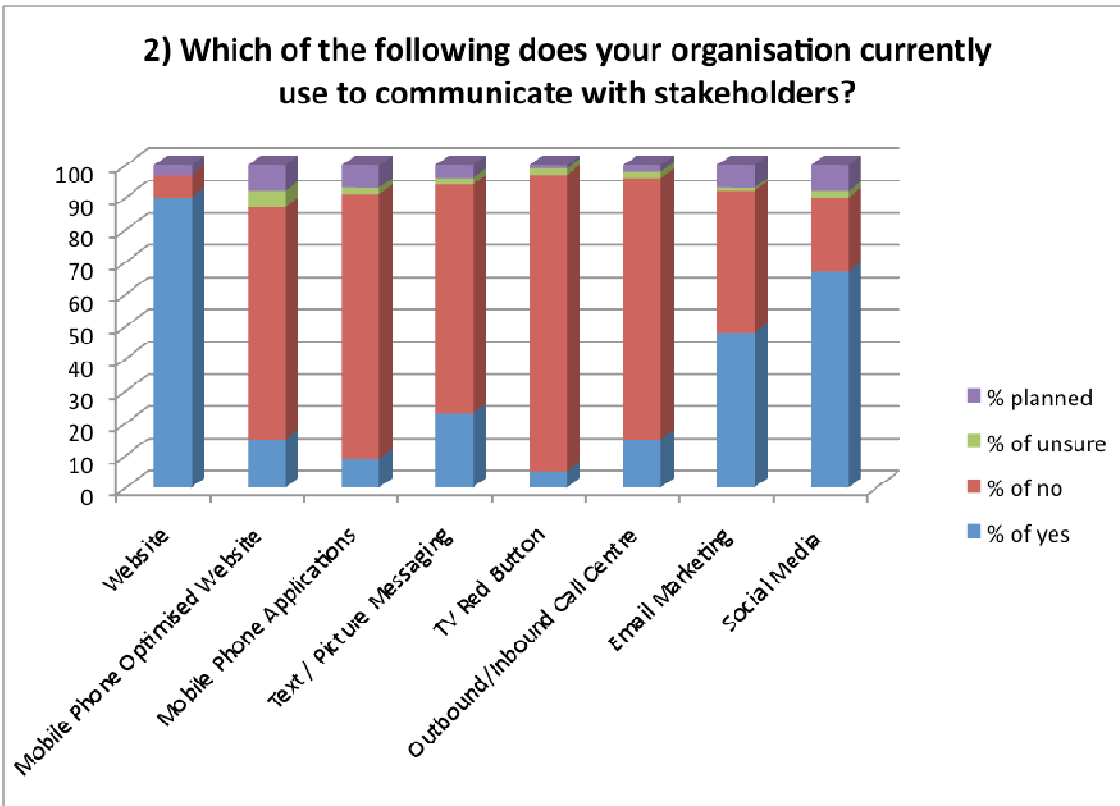
NB – Big charities equals income of £5 million and over

ENGAGEMENT

Q2 - Communicating with stakeholders

Internet-based activity is clearly driving communication channels between charities and stakeholders, with internet, social media and email dominating. Mobile messaging makes a small showing in the respondents' data. But there is a clear distinction between "yes" and "no" for this question.

What is most surprising is the small percentage of charities planning to expand their communication channel with stakeholders, especially expanding their mobile footprint for mobile web and apps. This suggests communication with stakeholders is either pull (internet and social media) or push (email), and does not have time sensitivity associated with the communication. With this in mind, messaging is the most likely channel for charities to deliver time-sensitive communications.

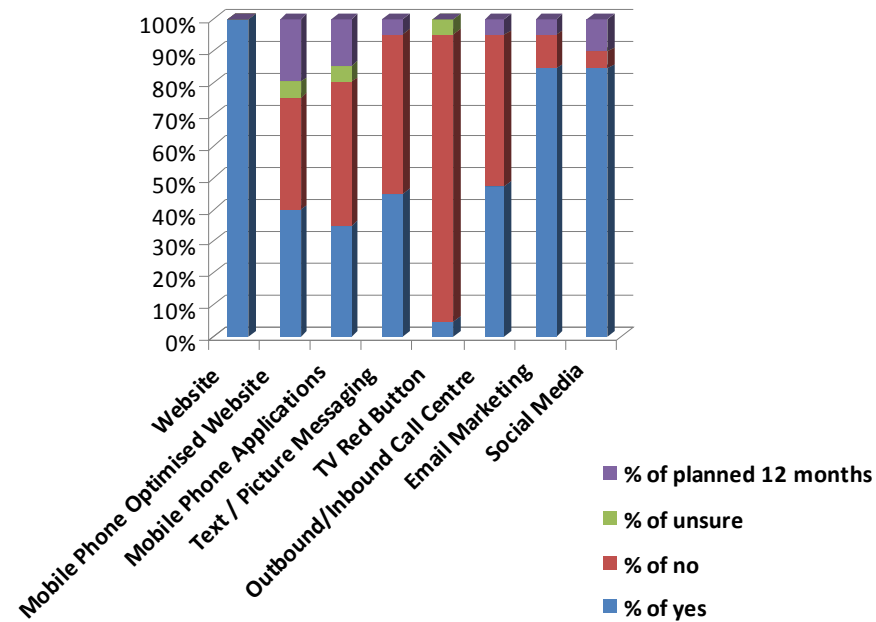


Source: AIME

There is a clear trend between total charity respondents and just the big 20 charity respondents, however, the bigger charities are the ones that use multiple channels to communicate with their stakeholders. Clearly, the red button is the least important channel used by the bigger charities, and this has been even more accentuated by the fact that at least 35% of bigger charities use mobile optimised websites, mobile apps, messaging and call centres.

2) Which of the following does your organisation currently use to communicate with stakeholders?

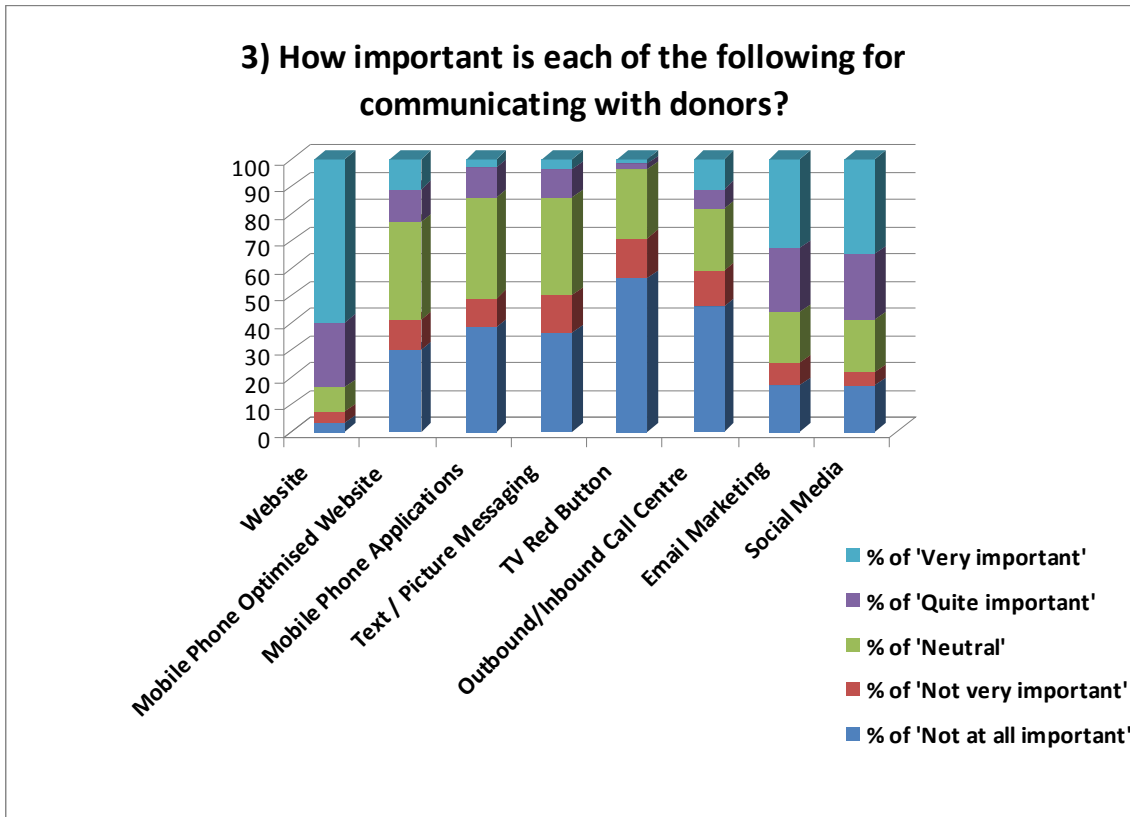
The big charities



Source: AIME

Q3 - Communicating with donors

There is a similar view from charities in terms of communicating with donors. Once again, internet is the critical channel, followed again by social media and email, with very little importance placed on mobile (including messaging). And this is very surprising, and not reflective of how the UK population is embracing mobile.



Source: AIME

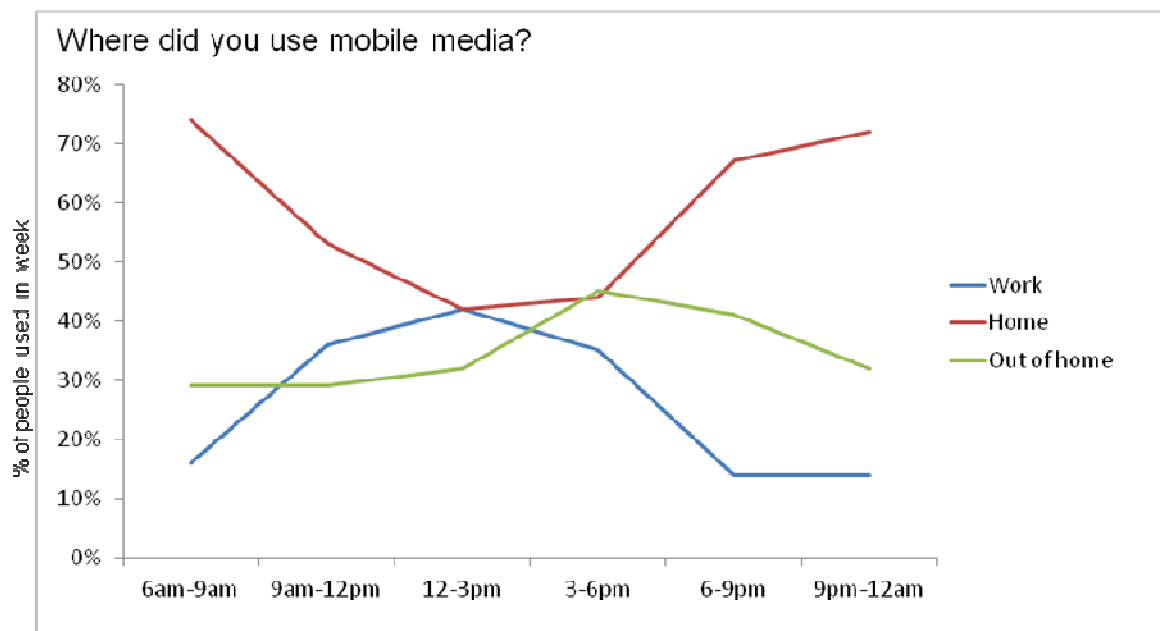
Research from the IAB has shown that mobile is either becoming a core medium for consumers during the week, or the primary access medium. Similarly, dual-media consumption is on the increase, especially among smartphone users, with mobile browsing/app usage while watching TV becoming the mainstay of “mobile mashing”.

This shows the association between TV and mobile is increasing, and must not be overlooked, or indeed, underestimated by the charities. AIME believes a broader communication strategy incorporating mobile will dramatically increase the potential “donor” window of opportunity, particularly among the 18-34 age group.

A strategy based predominantly around fixed internet is limiting, with perhaps an over-reliance on social media, and very little importance placed on mobile internet and apps.

Perhaps the most telling response is the fact that as many as 40% of charities remain in the “neutral” zone which does imply that their decision-making process can be influenced. Assuming that charities can be

influenced in a positive manner, it would mean almost 100% of charities would use a website,



Source: IAB's Mobile & the Media Day Study, Jan 2011
Base: Average of 500 respondents, over 7 days

Source: IAB's Mobile & the Media Day Study, Jan 2011

around 80% would use email and social media, and 60% of charities would have a mobile-optimised site, and around 50% would have an app and use messaging.

Consequently, this would mean that the total landscape for communication for all charities - included in this research - and their stakeholders, would closely mirror the responses from the 20 biggest charities only.

Presently, it highlights that all charities believe internet-based communications is the primary avenue for accessing donors. This is not the case. Consumers are upwardly mobile and this must be reflected in the available options to connect with a charity, namely, apps and mobile optimised web sites.

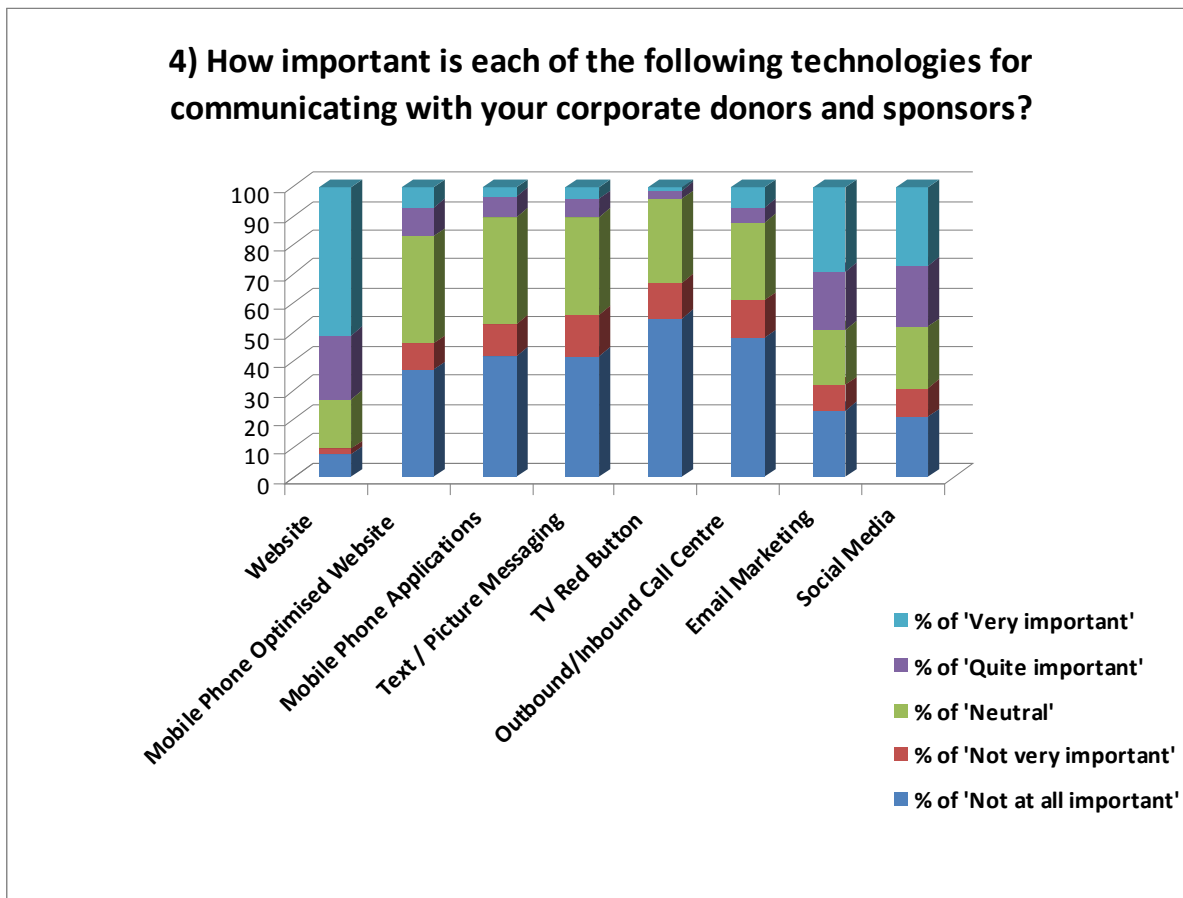
Q4 - Communicating with corporate donors and sponsors

There were almost identical responses to previous questions, which to a large extent is understandable with the results from Q2, but not with the previous question (Q3) considering that the messaging and type of communication with donors will be fundamentally different to stakeholders.

These highlight the fact charities effectively have a predominant internet-based communications strategy, and only a small percentage deviate from this sanctity. This method of communication is consistent for every charity, regardless of size, though there is a stronger emphasis on website, supported by email and social media, among the bigger charities.

However, it is worth stating that the research did not explore the actual messages delivered by the charities. The fact website, email and social media is as high for communicating with corporate donors and sponsors as it is for donors, is surprising given that the messaging would be fundamentally different, especially given the level of support from corporate donors and sponsors, based on the fact that they would be making larger donations than individuals.

As we've seen in previous questions, the 'neutral' charities will be crucial if communication reliance will evolve beyond internet-based channels.

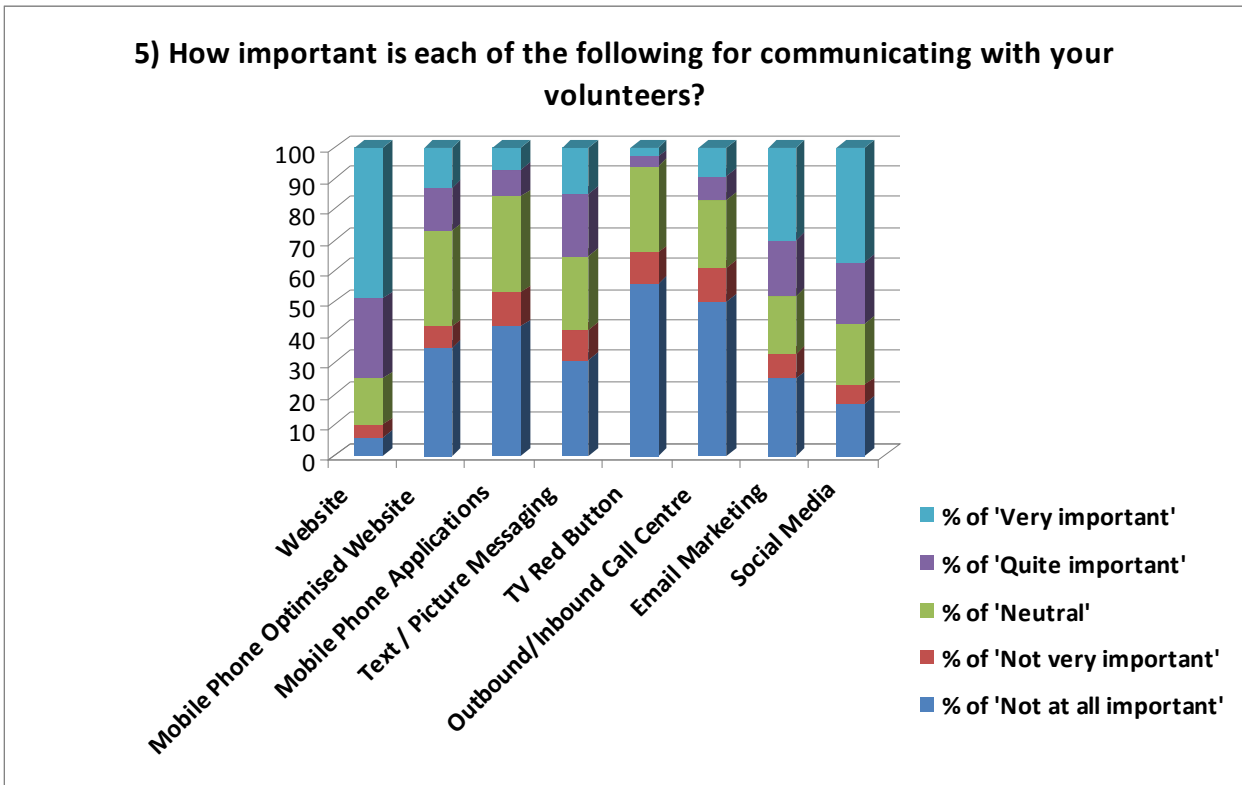


Source: AIME

Q5 - Communicating with volunteers

Once again, the technology remains the same, but the audience differs. Internet is the primary communications tool, and mobile remains very much a secondary channel, that could be converted into a primary channel if the neutrals are converted.

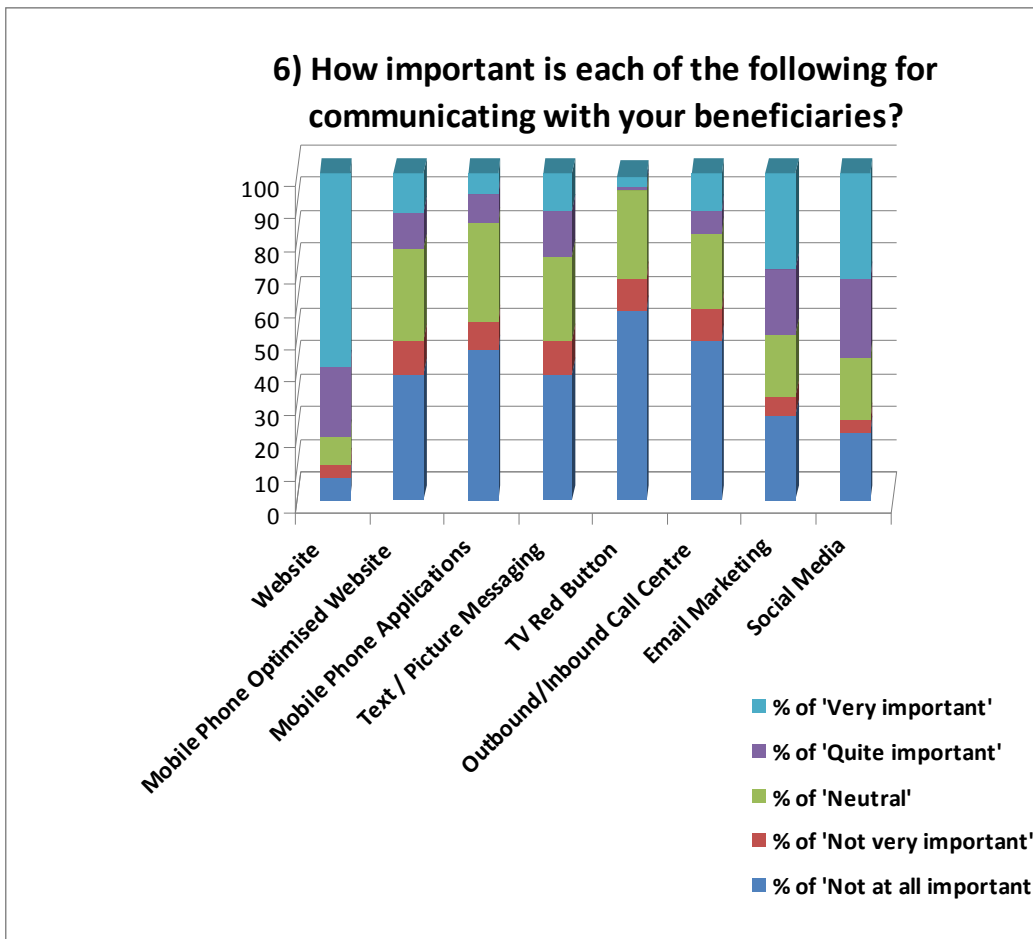
Interestingly, the bigger charities place a greater emphasis on mobile for communicating with volunteers.



Source: AIME

Q6 - Communicating with beneficiaries

The trends in terms of the technology charities use when it comes to communicating with beneficiaries are almost identical to other contacts, and again, this is consistent across all charities regardless of their size.



Source: AIME

Questions two to six reveal that the majority of charities have an internet-only driven communication strategy for all, and place minimum importance of mobile internet and apps beyond messaging. This means internet is the primary form of communication, with mobile a secondary channel for the charities. The key takeaway here is that mobile is viewed as a very personal medium, yet continues to be overlooked by the majority of charities.

Cost, as will be highlighted later in this report, is a key concern for every charity, and that could be a determining factor in how charities communicate with their contacts. But as the responses revealed, all charities have adopted a single communication strategy and AIME believes that is driven by familiarity and for the majority of charities, resource.

Q7 - Effectiveness of communications*

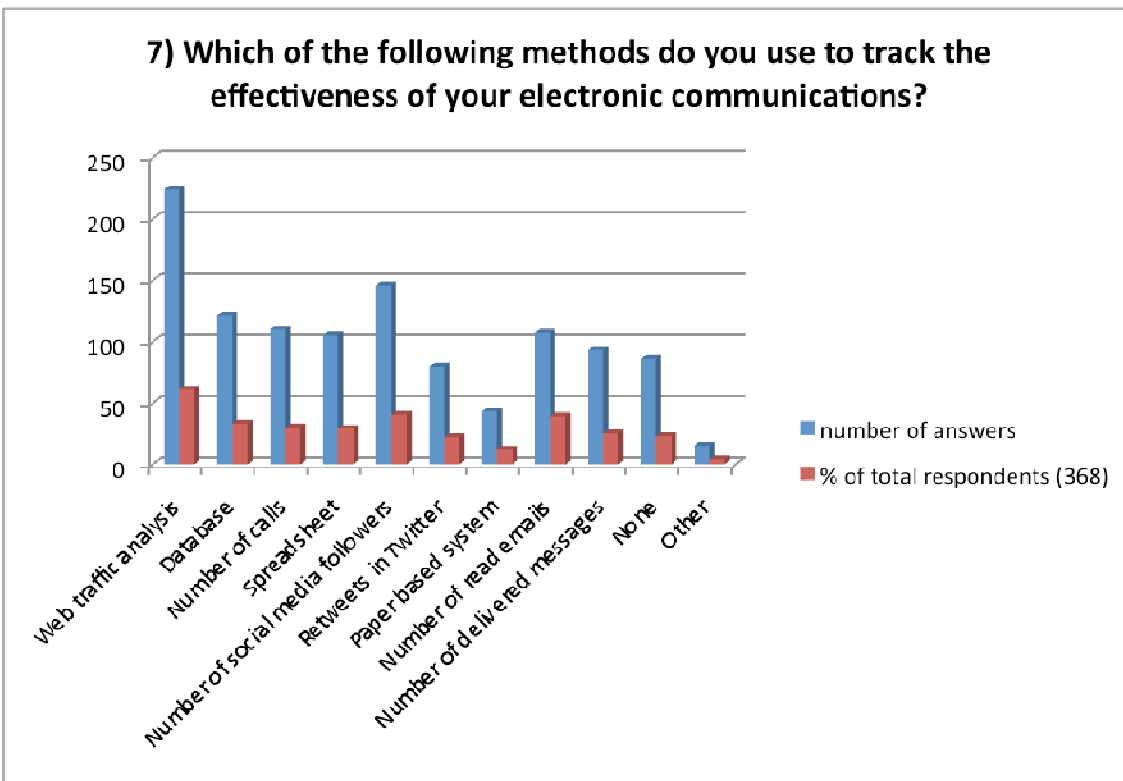
Given the responses from the previous questions, it is not surprising to discover that web traffic analytics dominates how charities track the effectiveness of electronic communications, based on 61% of respondents, and it is highly likely that Google Analytics will feature heavily among this category.

This was followed by the number of social media followers, 40%. Around 30-35% of charities said they use database, number of calls, spreadsheets and number of read emails as means of tracking the effectiveness of electronic communications.

However, the majority of these methods do not provide sufficient measurement to truly show the effectiveness of a communication. For example, a delivered message or opened email, do not confirm the recipient has read the content, and can be misleading. Similarly, a charity can have a lot of social media followers, but are they really capitalising on that?

This means that the effectiveness of measurement lacks transparency and requires significantly more accountability. The fact web analytics is used by almost two-thirds of charities is reflective of the importance the charity sector places on the internet, as demonstrated by the earlier questions.

To this end, perhaps more emphasis should be placed on retweeting a comment as this not only shows a positive action to a communication, it also clearly demonstrates that the original recipient has read and consumed the content.



Source: AIME

*Respondents could answer this question multiple times.

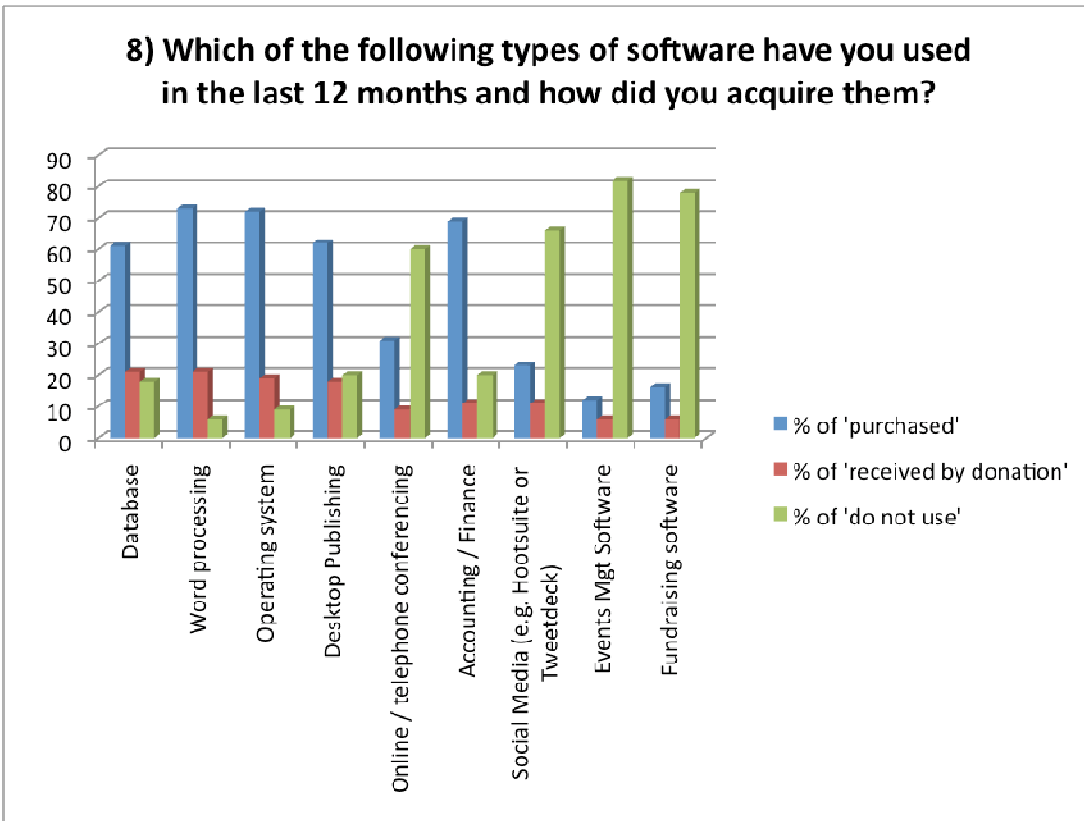
Q8 - Software and its acquisition

There are five core types of software identified by charities. Database, word processing, operating system, desktop publishing and accounting/finance are the five most popular types of software that have been purchased by charities, while online/telephone conferencing, social media, events management software and fundraising software, are the four types of software considered of least use to charities.

There is a direct correlation between the importance placed on software and the percentage of charities accepting software donations. For example, 21% of charities received database software by donation. Similarly, 21% of charities accepted word processing software donations.

On average 13.6% of charities has received software as a donation over the last 12 months.

Clearly, it is the smaller charities that rely on donations, as analysis of how the big 20 charities acquired software, reveals that almost 100% purchased the majority of their software.



Source: AIME

INCOME GENERATION

Q9 - Frustrations with technologies for fundraising

This was an open question with respondents able to air their frustrations. The majority of charities said affordability was their biggest frustration with regard to technology. In fact, of the big 20 charities that responded to this question, 50% cited cost as being their biggest frustration. However, as the previous question identified, this has not prevented the biggest charities from purchasing the technologies, as opposed to the smaller charities which are more reliant on donations.

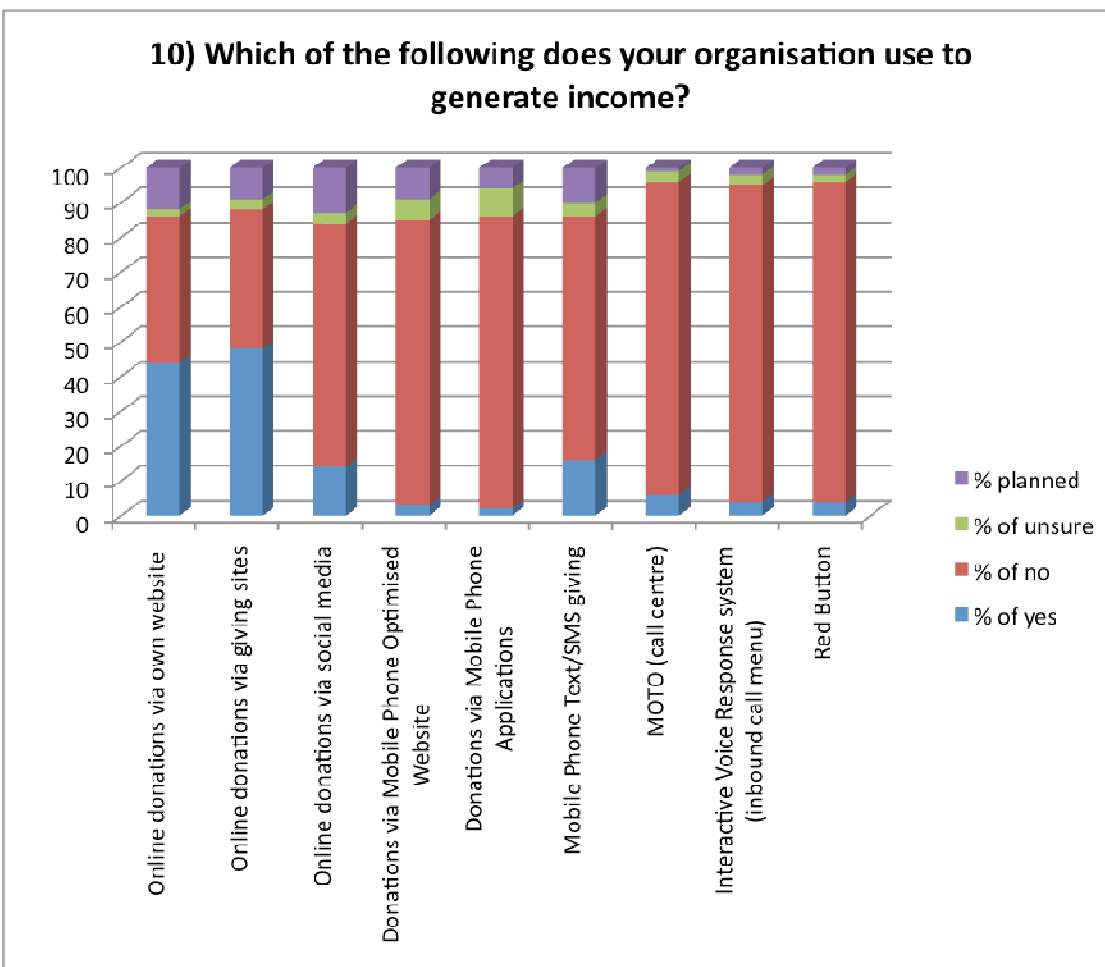
Other common responses included a lack of technological understanding, and the lack of resource to then try and understand the technology, as well as a lack of flexibility. These are all common trends that have emerged in an ongoing direct or indirect way throughout this research, and is increasing the case for a solution than can address the lack of technological understanding and available resource to try and understand the technology.

Q10 – Income Generating Technologies

Results from the previous questions have highlighted the level of importance that charities place on the internet. The dominance of the internet as a communications resource for charities has also been extended as the primary income generation channel also. The most popular channel for income is via giving sites, ahead of charity websites. Messaging is the third largest income generating channel, closely followed by social media sites.

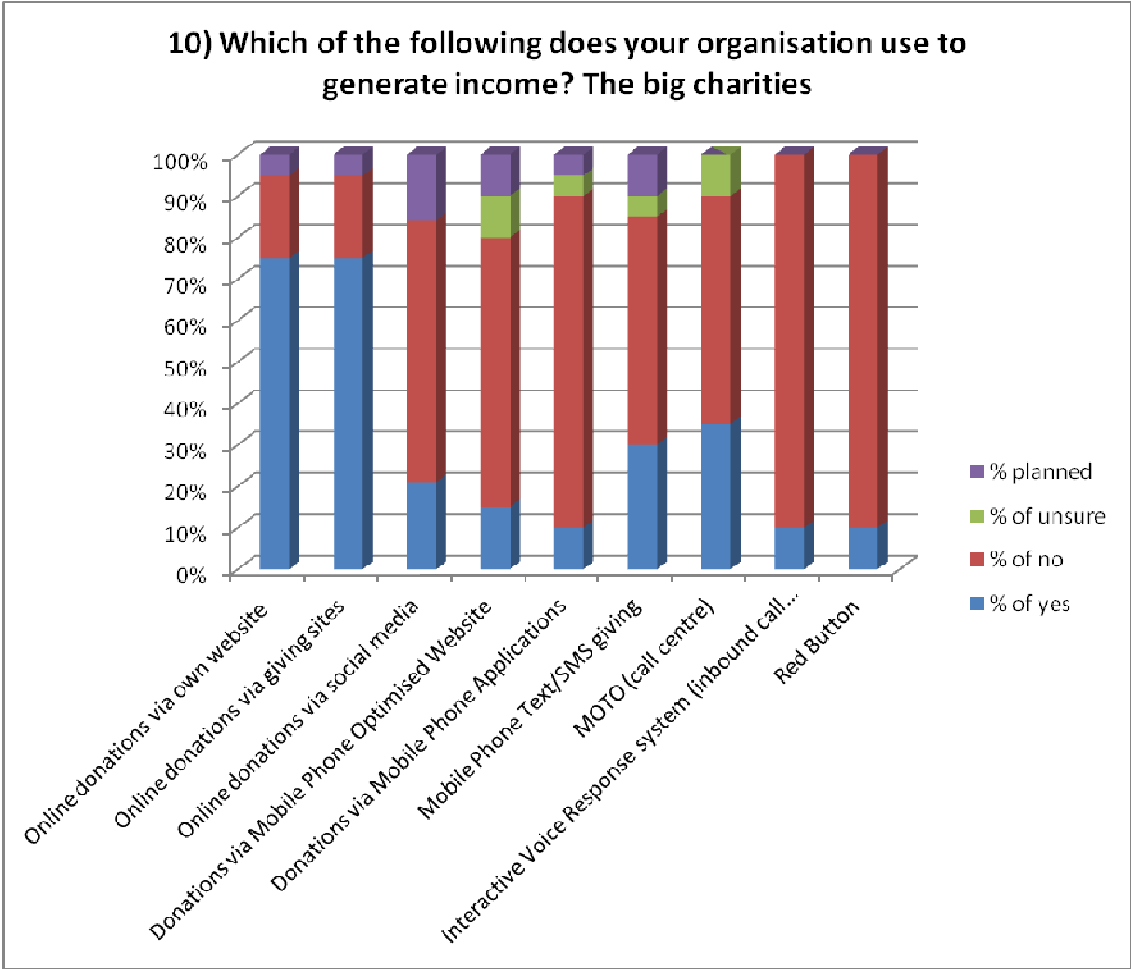
As the responses to earlier questions have demonstrated, there is a reticence from the charities sector to commit to the mobile channel. Less than 9% of charities plan to generate income via a mobile optimised site, and only 6% plan to develop an app.

It shows that traditional web not only dominates charities' communication strategy, it also dictates their income generation plans. AIME does not believe the internet is cannibalising income generation of the charity sector, however, mobile will significantly extend the income-generating window for charities, when users are away from their PC.



Source: AIME

There is a significant difference between how the average charity in the UK generates income compared to the big 20 charities. Given the fact the big charities generate income of £5 million upwards to hundreds of millions of pounds, it is conceivable that they would be primed to utilise multiple channels. This is not the case. Both online via their own website and a third-party website play an equally dominant role, followed by text giving and call centres. Only a handful of the big charities use social media to generate income, and even fewer use an app or mobile optimised site.



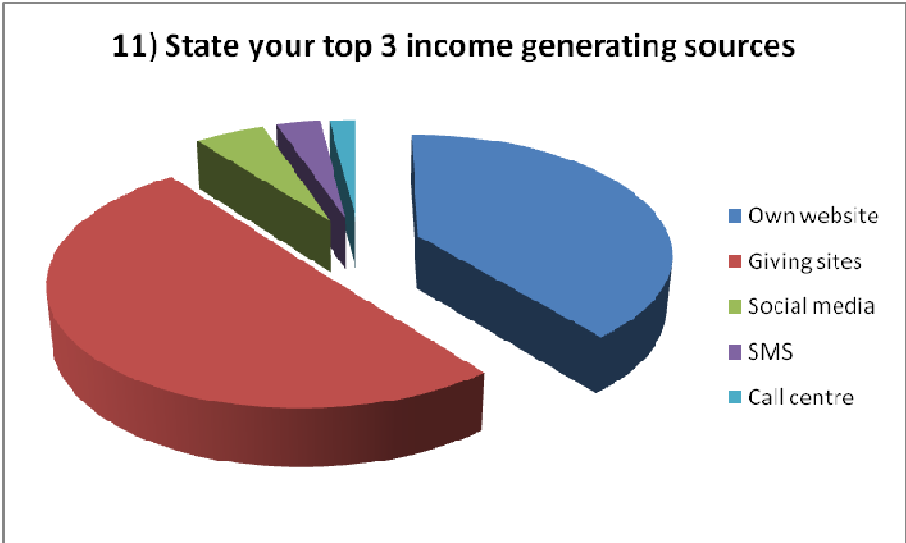
Source: AIME

Notable differences between the big charities and the total average charity response, reveals that more of the bigger charities are planning to generate income via mobile apps, mobile optimised sites and social media. Given the percentage of planned activity in social media, this clearly pushes mobile into a tertiary level of income generation: internet, social media and then mobile.

Truth be told, there is actually very little difference in the income generation method of the big charities and the average charity. But then this should be expected based on the consistency of responses throughout this research towards the internet.

Q11 - Top 3 income-generating sources

The low number of responses for this question indicates that the majority of charities do not have three income-generating sources. Almost 50% of respondents selected 'giving sites', with approximately 35% citing their own website. Given the common thread of responses throughout this research, it is not surprising that the internet dominates yet again.

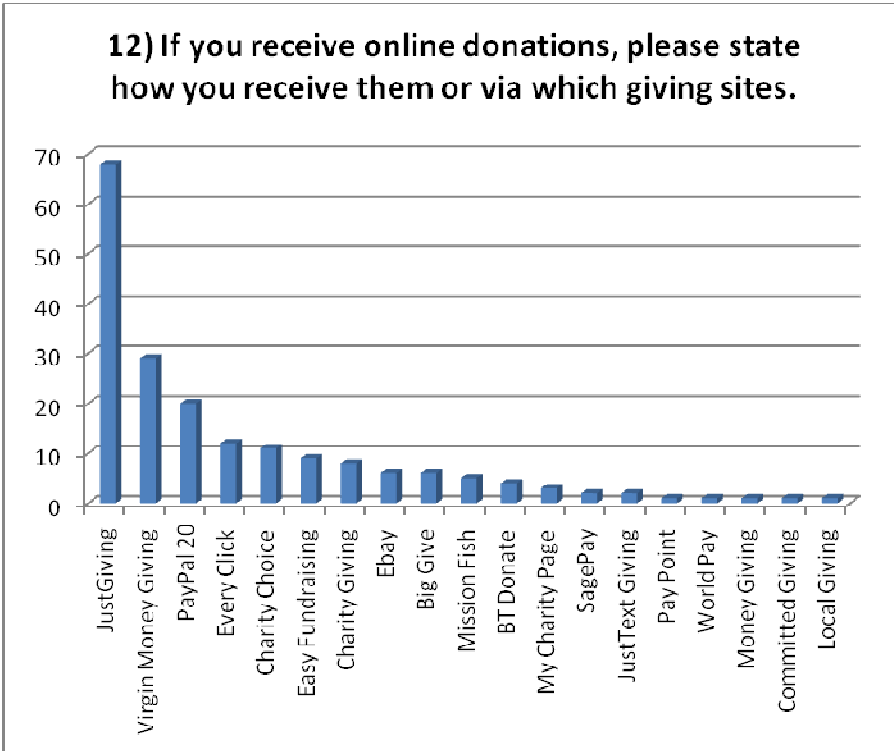


Source: AIME

Q12 - How do you receive donations?

JustGiving dominates the online donation landscape, with almost 70 charities receiving donations via the service. Virgin Money Giving and PayPal 20 follow and are close to penetrating 30 and 20 charities respectively. Otherwise, there is a clear long tail of donation payment providers spread across the sector.

In addition to this question, charities were also asked to provide their key reasons for choosing the particular payment option. The three most common responses included cost, ease of use and implementation, all of which are in close alignment with the other technological-based questions included in this research.

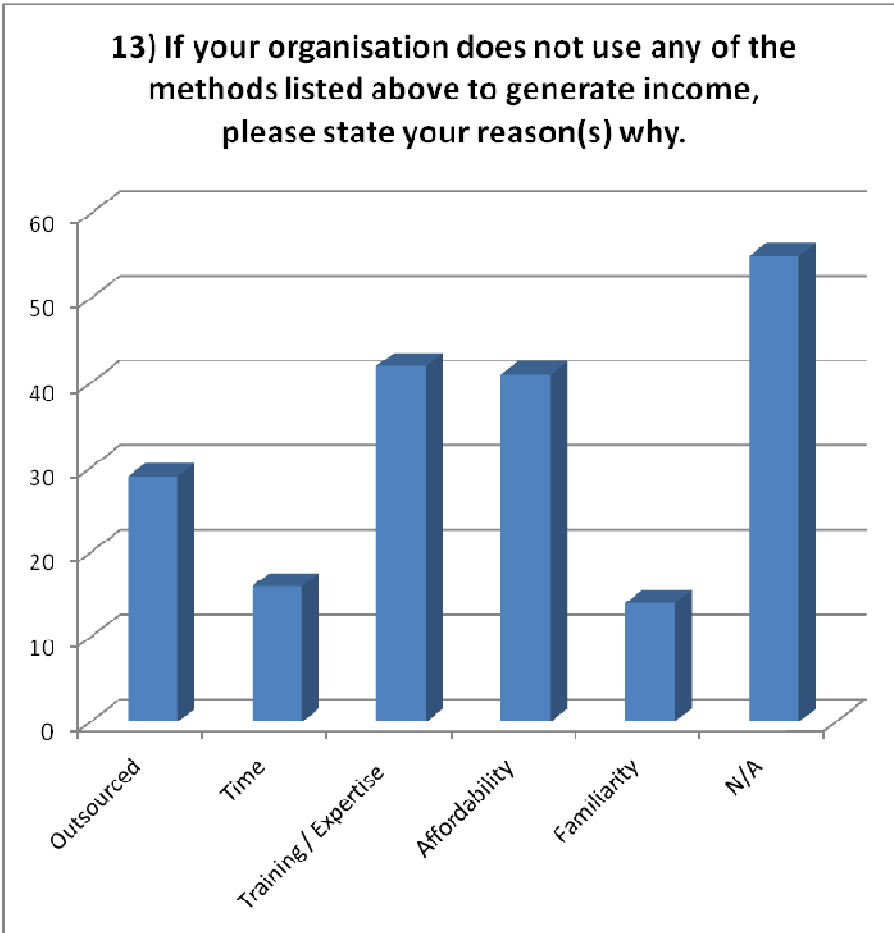


Source: AIME

Q13 - Reasons for not generating income

The usual suspects resurfaced yet again as reasons for not using the income-generating methods outlined in the previous question. Around 40 charities claimed both training/expertise and affordability were the main reasons, while 29 said they outsourced the process.

However, that only tells part of the story. Over 50 charities opted for “n/a”, which either implies they did not want to answer the question, or that there are alternative reasons that need to be included as part of the research responses.



Source: AIME

Q14 - The effectiveness of technology

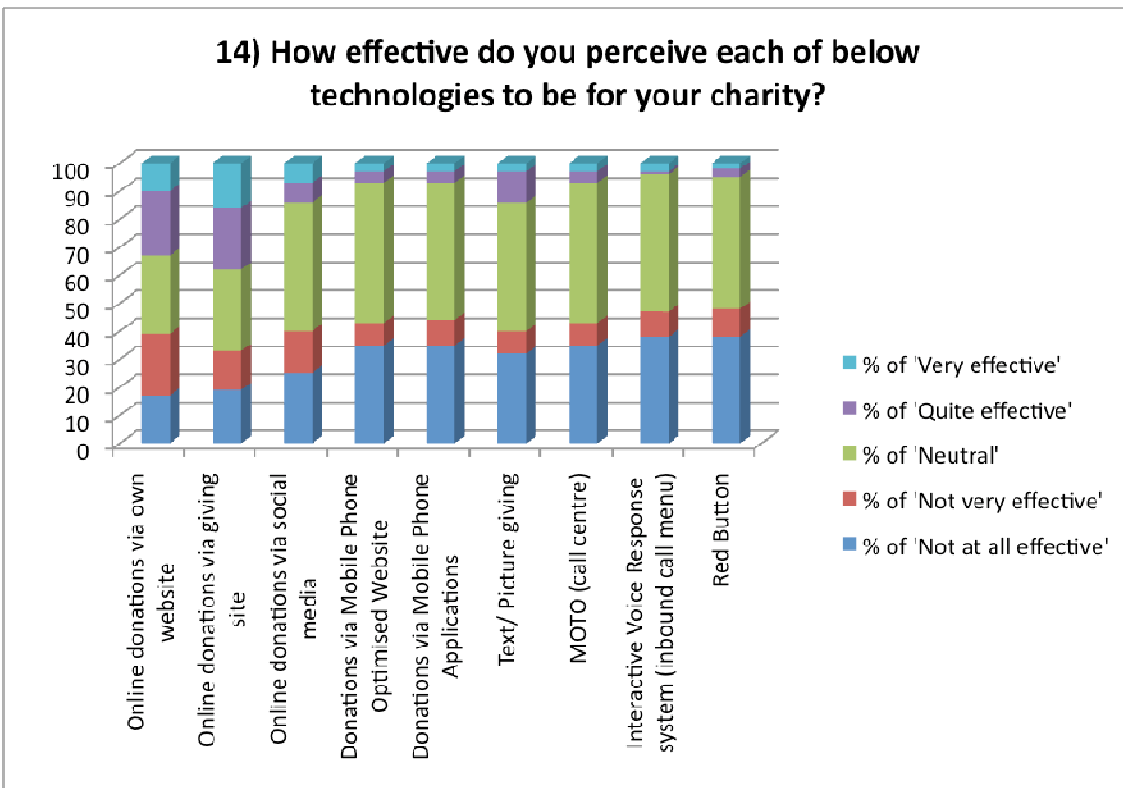
There are clearly questions arising within the charity sector around the effectiveness of the internet as a income generating channel. While online donations via giving sites and own website are clearly viewed as the most effective technologies for income generation, only 38% (giving site) and 33% (own website) of charities viewed these technologies as quite or very effective. As with before, both social media and messaging are considered the next level of effectiveness.

The key fact is that despite the over-reliance on internet-based activity, almost two-thirds of the charity sector does not view the internet as an effective technology – yet that is the technology that is driving the communications and income-generating strategies.

Furthermore, question marks arise over the effectiveness of a charity’s own website, with more charities citing third-party websites as more effective than their own.

What’s more, given this view of the internet’s effectiveness, it makes all the more bewildering as to why the charity sector is not exploring more effective channels, such as mobile.

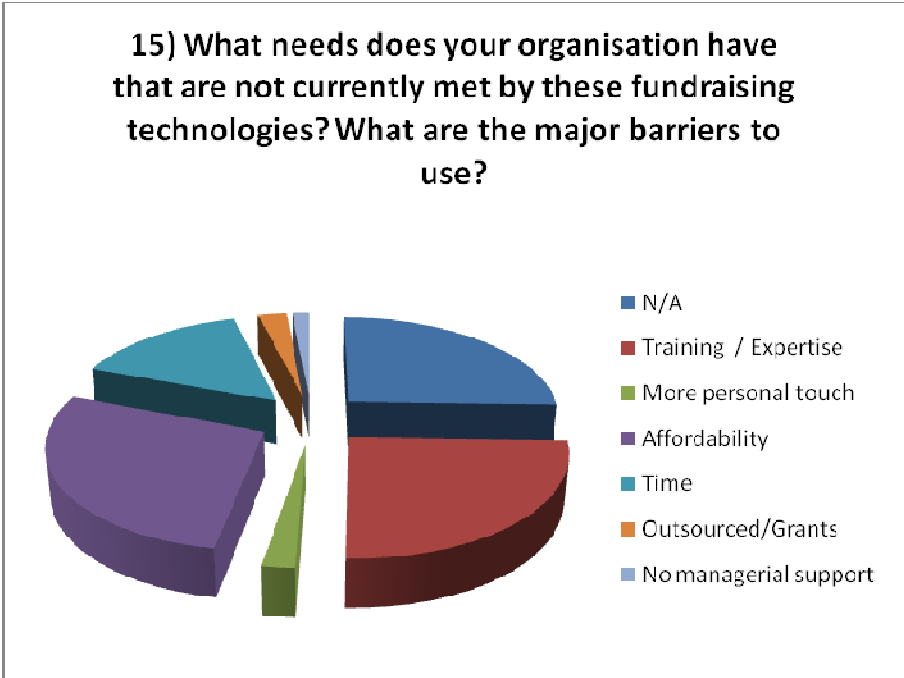
However, it is important to highlight that the neutral responses to this question represents between 40-50% of charities for most technologies, which does show an uncertainty towards technologies like mobile, IVR, red button, etc.



Source: AIME

Q15 - Barriers to adoption of fundraising technology

Affordability and the lack of training and expertise are the primary fundraising barriers for use of technologies by charities. Time was the third most popular response. As with question 13, “n/a” features strongly among charity responses, and could again represent the fact charities do not want to answer the question, or that there are more far-reaching reasons that have not been tackled, and could be worth further investigation.



Source: AIME

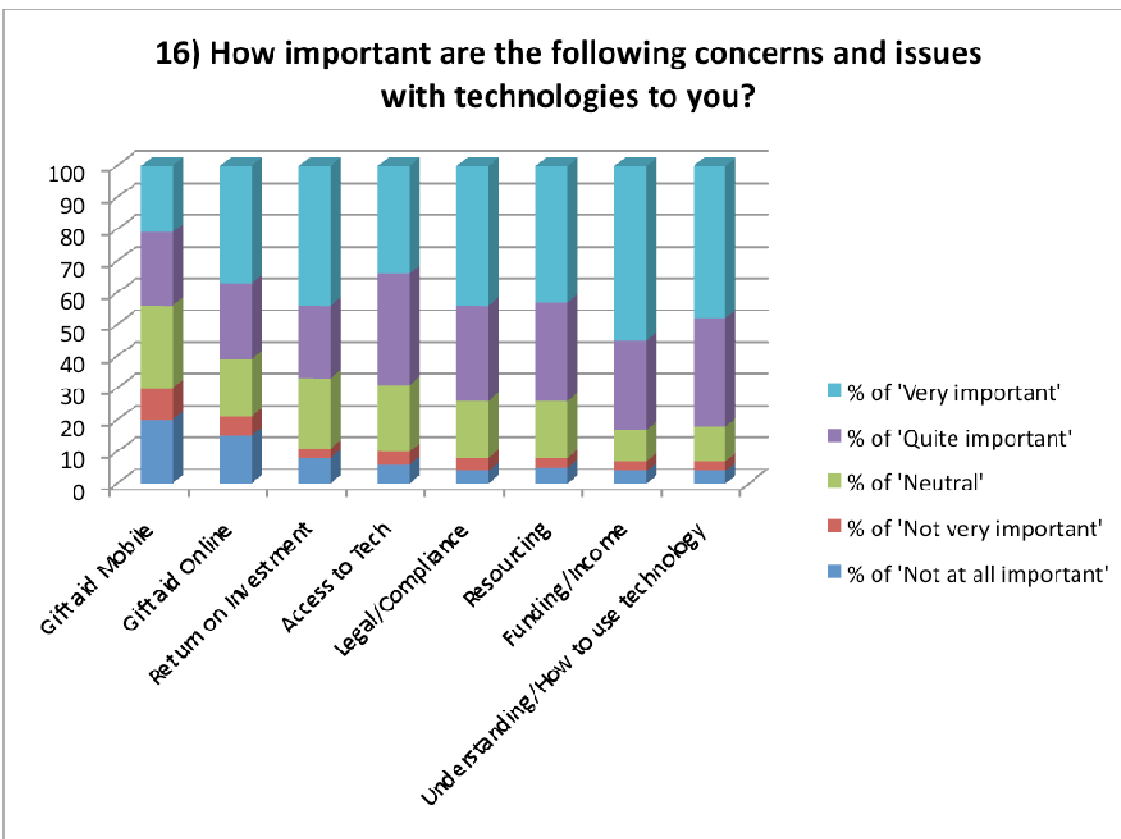
CONCERNS/ISSUES

Q16 – Technology concerns and issues

Funding and income is viewed as a 'very important' concern and issue by 55% of charities, followed by understanding how to use the technology (48%). By combining the very important and quite important responses, 83% and 82% of charities believe funding/income and understanding the technology, respectively, are the most important concerns and issues.

In fact, over 50% of charities believed the concerns and issues for every category, excluding Gift Aid Mobile, were quite or very important. That has to be a concern. But it also starts to explain the role internet is playing within all charities. Resourcing, funding, and understanding are all key factors in determining how charities operate. Ultimately, this has resulted in a technological shortfall, and resulted in virtually all of the charities focusing on the one channel that can deliver every aspect to their strategy: the internet.

Alarming, this research has highlighted that there is a lack of understanding in their primary channel; the internet.

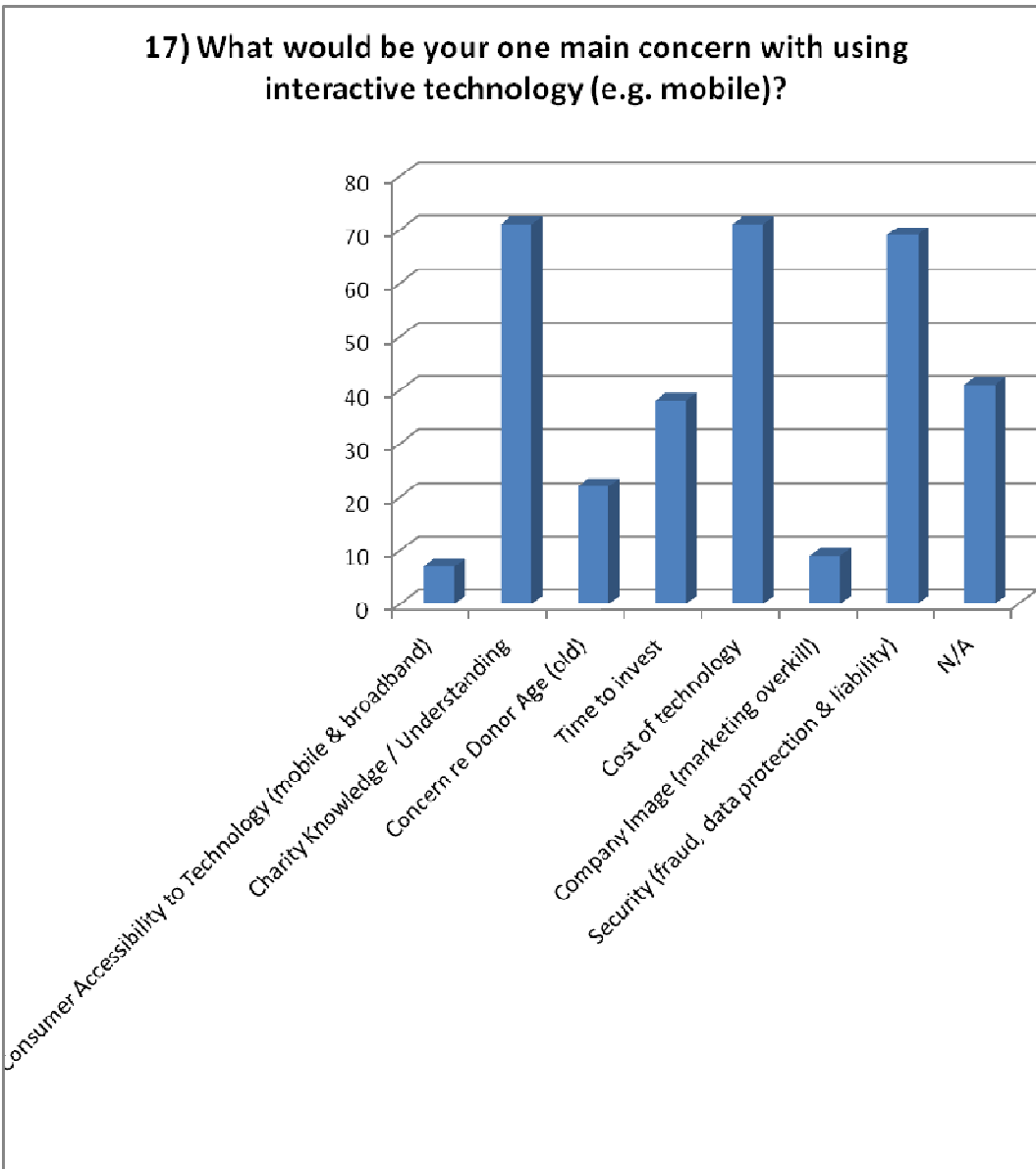


Source: AIME

Q17 - Primary concern

Technology, knowledge/understanding and security are the three biggest concerns regarding using interactive technology for charities. The latter response, security, is self explanatory given that the majority of charities do not have the knowledge or understanding of technology and are therefore unlikely to have the prerequisite knowledge and understanding of security.

Interestingly, consumer accessibility to technology, such as broadband and most intriguingly mobile, is very low, yet throughout this whole research, the responses have highlighted the role internet plays and the minimal role mobile has. However, the charities are clearly aware of the fact that its donors and sponsors, etc, have access to mobile, and still do not capitalise on this channel.



Source: AIME

SUPPORT

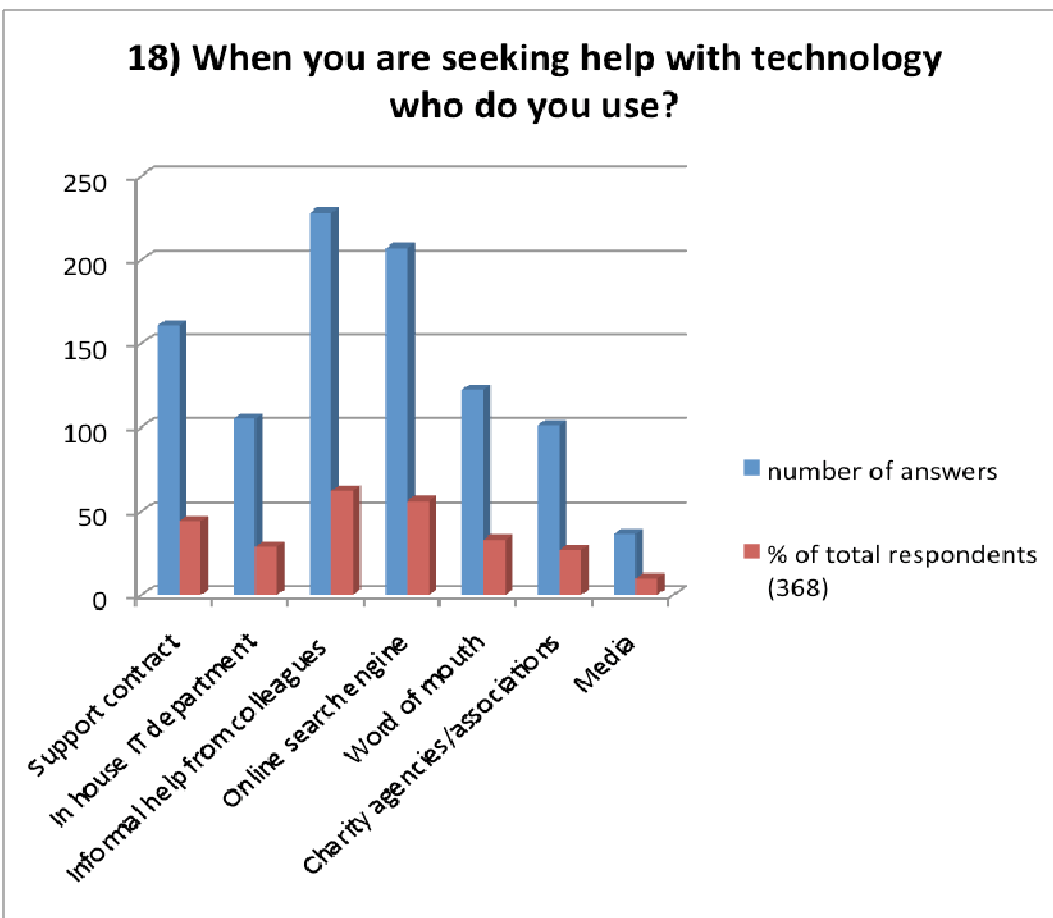
Q18 - Technological support

Only 44% of charities will use their support contract to solve any technology issues, with 62% seeking informal help from colleagues and 56% using online search engines. Incredibly, less than one-third of charities will use their in-house IT department to address technology issues. This could be a timing issue and that it is faster to consult with a colleague sat locally or use Google, than seek the assistance of the in-house IT technician.

Based on previous responses, the fact that 44% of charities use their support contract does seem high, and is most likely the result of these charities being the bigger charities that can afford the investment in technology that provides support, or it is a charity that has accepted a technology donation that include support, from a corporate sponsor for example.

The results from this question also highlight the fact there is very little communication between charities, which in itself can stifle the understanding and technological development of the sector, by not sharing both the positive and the negative experiences with peers.

As already highlighted in question 16, the lack of resource is the most likely factor prompting charities to use online search engines and colleague support.



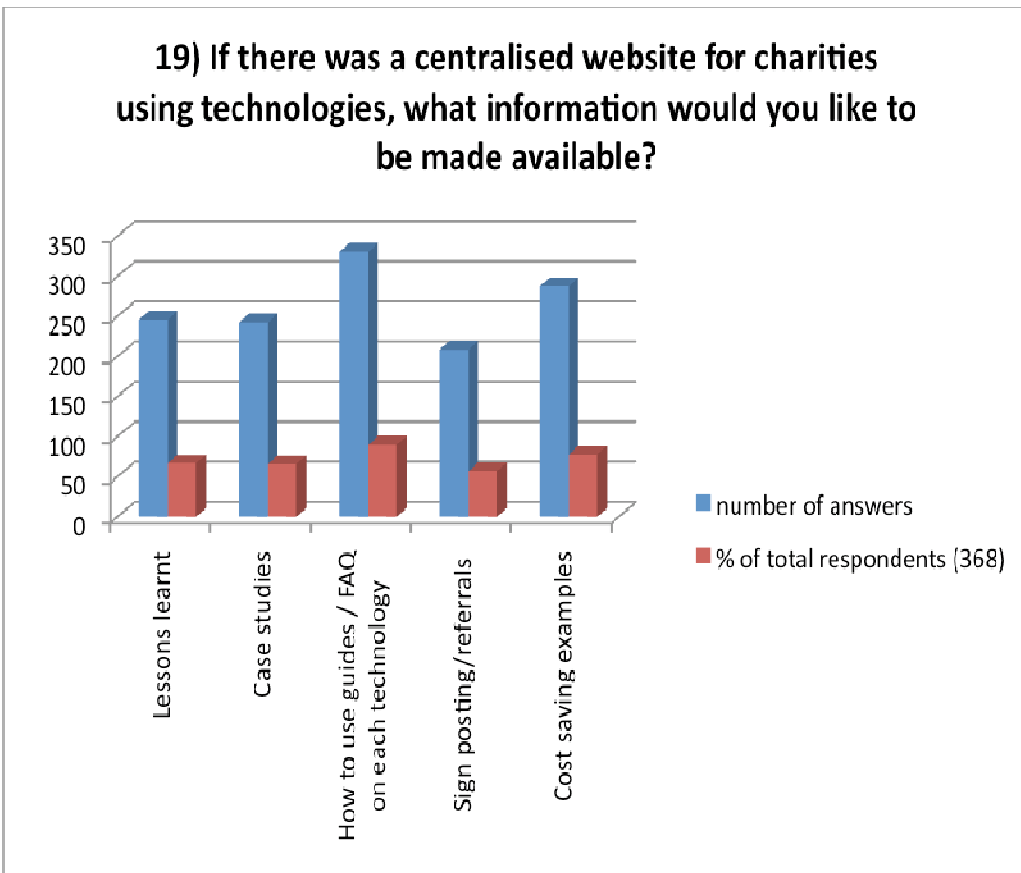
Source: AIME

Q19 - Centralising the resource

The need for more education was the most popular response from charities in terms of the information published on a centralised website, with 90% of charities in favour of such content. This was followed by cost saving examples, which attracted 78% of charities.

Indeed, the remaining three topics, lessons learnt, case studies and sign posting, all attracted a favourable response from the charities that answered the question, attracting between 57% and 67%.

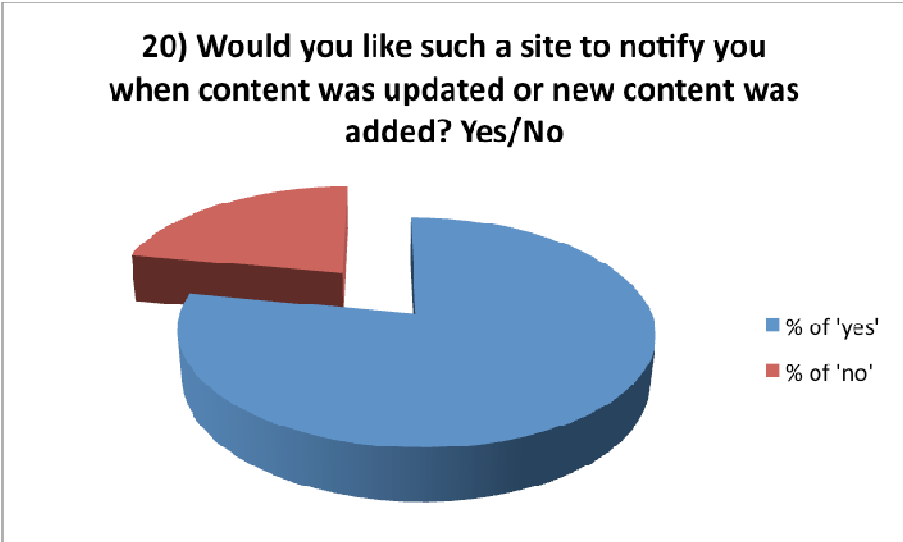
The lack of knowledge and understanding, coupled with a limited funding and resource, as identified in the previous questions, is a clear driver behind a central website for charities. A site which can provide cost saving examples, openly address concerns around funding and income, signposts to useful resources and provides a platform of knowledge to deliver an improved return on investment would clearly be a very welcomed addition to the charity sector.



Source: AIME

Q20 - A centralised website

The appetite for information to address the abundant lack of technology understanding throughout the charity sector is very evident with 78% of respondents happy to receive updated content notifications from a centralised website.



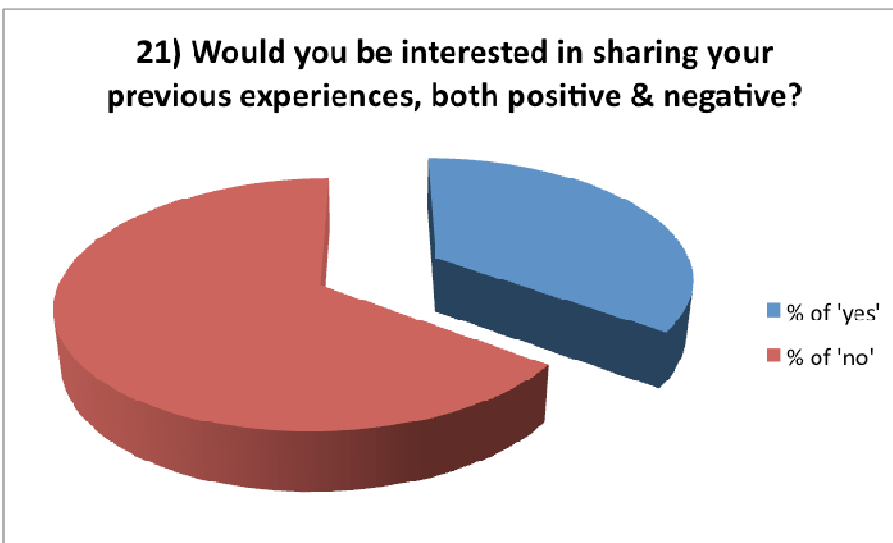
Source: AIME

Q21 - An open environment

To follow-on from the previous questions, although there is a transparent need for the sharing of knowledge and expertise and case studies among the sector, there is a reluctance to do so by the majority of the charities. Indeed, for the concept of a centralised website to address the technological shortcoming, it will require those charities willing to share their experiences and case studies to make the bold first move in what would be a leap of faith in the hope other charities will follow.

If this development does not occur, then the gap between the innovative charities and the followers will increase, as the lack of communication will mean there is no dissemination of knowledge and data. This is indicative of a closed sector, and demonstrates the level of competition that exists within the UK charity sector for the donor's money.

Until this situation is addressed, there will always be an unwillingness to share information, and the powerful will become more powerful, and the weak, weaker still.



Source: AIME

Conclusion

There are two key findings to be extracted from this piece of research. Firstly, that there is a lack of knowledge and understanding with regard to technology. And, secondly, there is a lack of willingness to share knowledge and understanding among the charity sector.

There is a huge demand for education, and increased insight into how technologies can be effectively used by the charity sector. The lack of understanding of technologies throughout the charity sector is limiting the effectiveness not only of their communications strategy, especially with donors, but also massively impacting on income generation.

In terms of communication strategy, AIME believes charities have to expand beyond a predominant internet-only model, and utilise mobile, which has now become the access medium, whether the user is in front of a PC or TV: mobile has become the ubiquitous second screen. What's more, mobile is the most accessible means of donating while on the move, and could be the result of an impulse donation in response to a radio campaign or billboard.

But the charity sector is not the only sector slow to respond to mobile. Research by AIME, with the IAB and IMRG in 2010, revealed that only 8% of high street retailers are 'mobile enabled', however it was positive to note that 41% said they were committed to investing in a mobile platform within the coming 12 months as they recognised the commerce potential of mobile. Similarly, mobile could be an equally powerful tool for charities.

There is an over-reliance on internet-based channels – websites, email and social media. This is based on two reasons: firstly, that charities lack the knowledge and education required to develop more effective campaigns beyond these three areas. Secondly, the minimal cost associated with websites, email and social media, make them highly-attractive to the charity sector, but constrained in their effectiveness.

AIME does not believe internet-led initiatives (websites, email and social media) will cannibalise additional activity or technology used by charities. In fact, the use of mobile in particular will increase the effectiveness of existing internet initiatives, while also expanding the window of activity between a charity and donor, and therefore increasing the propensity to generate income. A mobile is in a consumer's possession for an average of 16 hours a day, which makes mobile the ideal response mechanism to any charity campaign across all media.

However, cost is also a major issue, and any associated cost of mobile, such as to develop a mobile site or app, are acting as big deterrents for the charity sector. Seeing as software has been donated (and accepted) to charities, it is AIME's belief that charities should be more vocal in attracting mobile web and app developers 'donors', to donate sites and apps that can assist in the income generation for the charities.

The fact staff are relying on colleagues and online search to assist with their technology enquiries and issues highlights the urgent need for a centralised website to educate the charity sector on how to effectively deploy different technologies based on their needs and requirements.

There is also a need for case studies from charities that have used various technologies successfully, and a willingness to share this data with the industry. As Q21 revealed, there are a lot of negative experiences which charities on the whole are not willing to share. To this end, charities must not be afraid to openly discuss their experiences with their peers in order to understand their mistakes, rectify, and move on.

To this end, charities must be encouraged to work together, to share experiences, and increase the potential donation pie, instead of each operating within a walled garden and using technology that is not effective, and failing to react to an increasingly mobile audience. By increasing the window of donation, the pie will increase. And as online merges with mobile, charities must follow suit. And the ones that do so sooner rather than later, will reap the benefits.

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