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# Global Mobile Advertising Revenue

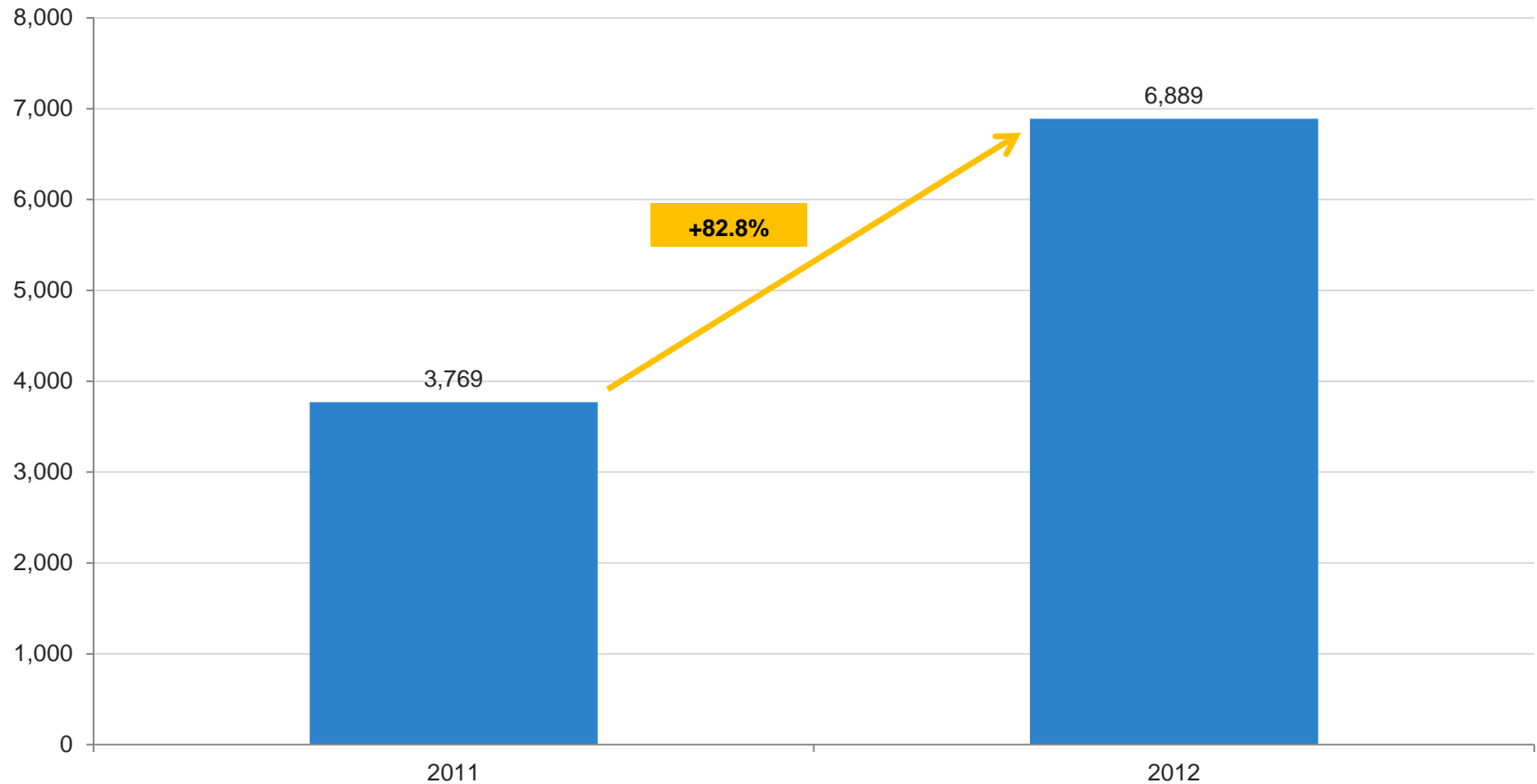
Display, Search, Messaging 2011 & 2012 Across Regions



# Global mobile ad revenue nearly doubled in 2012



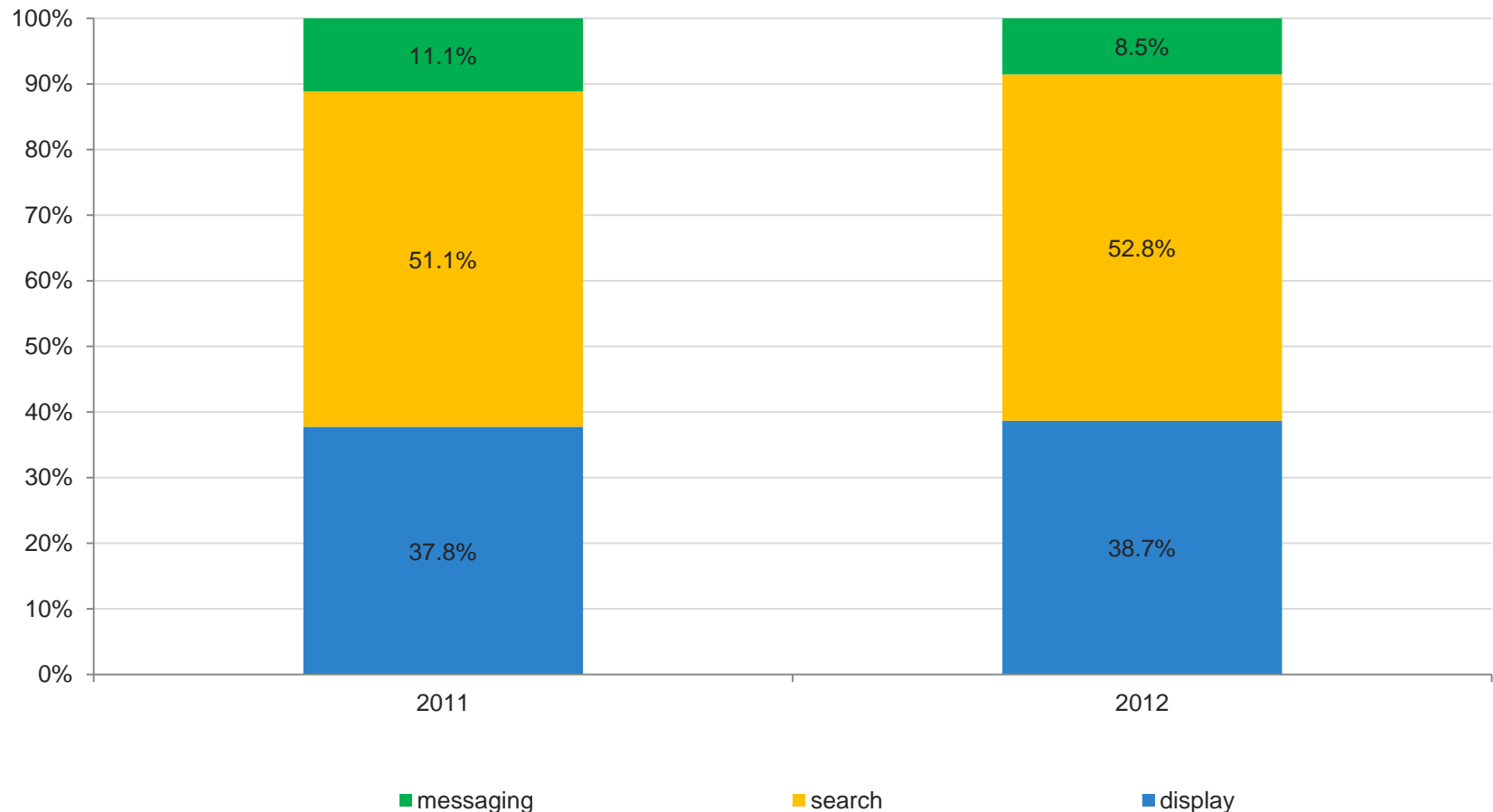
**Global mobile ad revenue (€m)**



# Messaging under pressure as both display and search increase their share



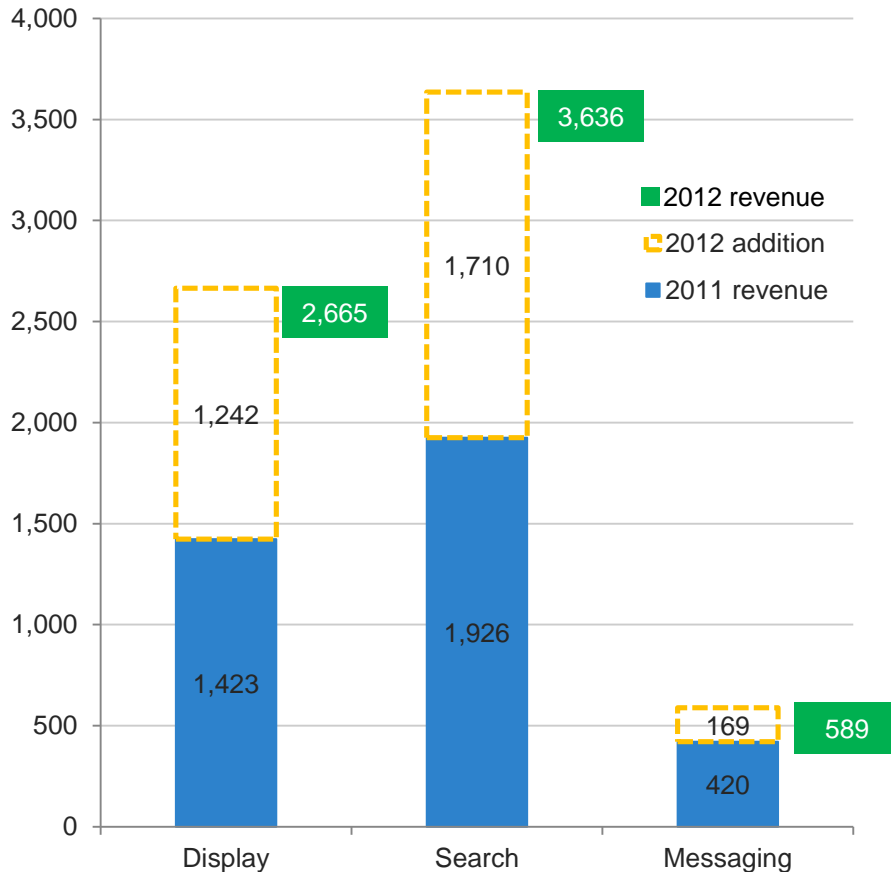
## Global mobile ad revenue share by format



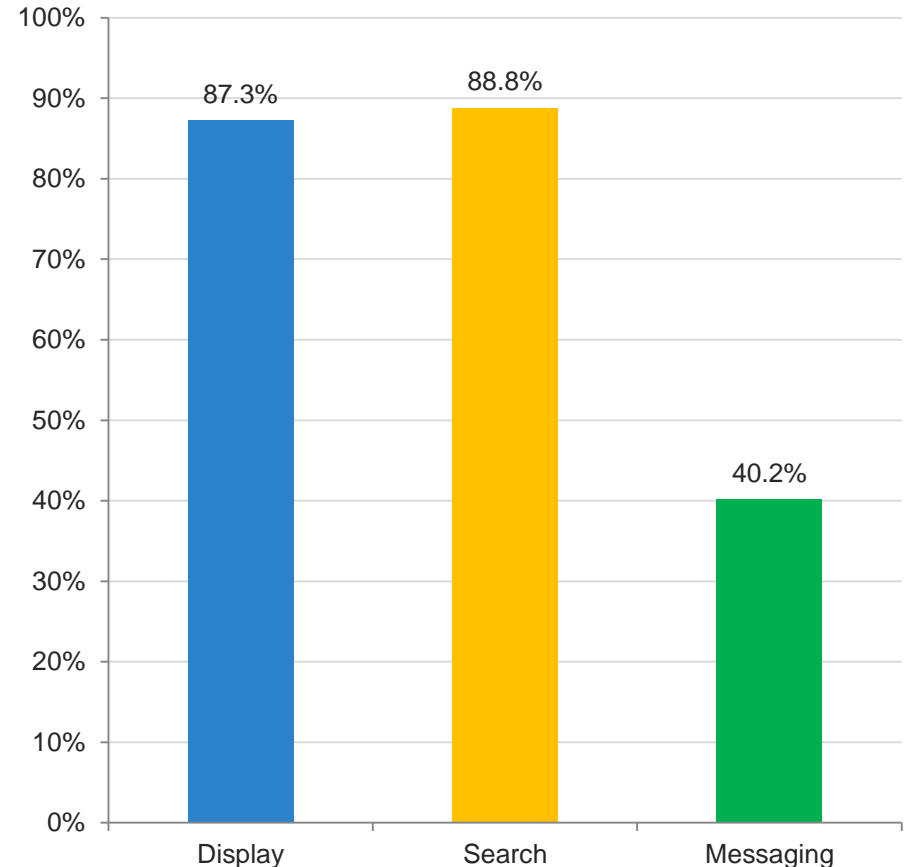
# Display and search growth on par, twice as fast as messaging



## 2011 revenue and 2012 gains by format (€m)



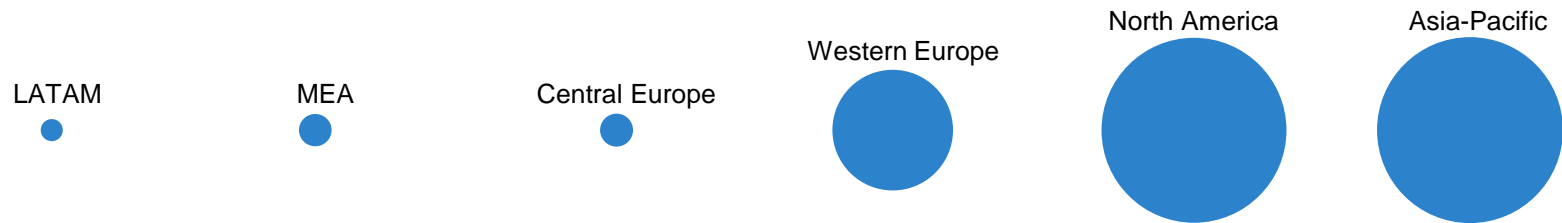
## Mobile ad growth in 2012 by format (%)



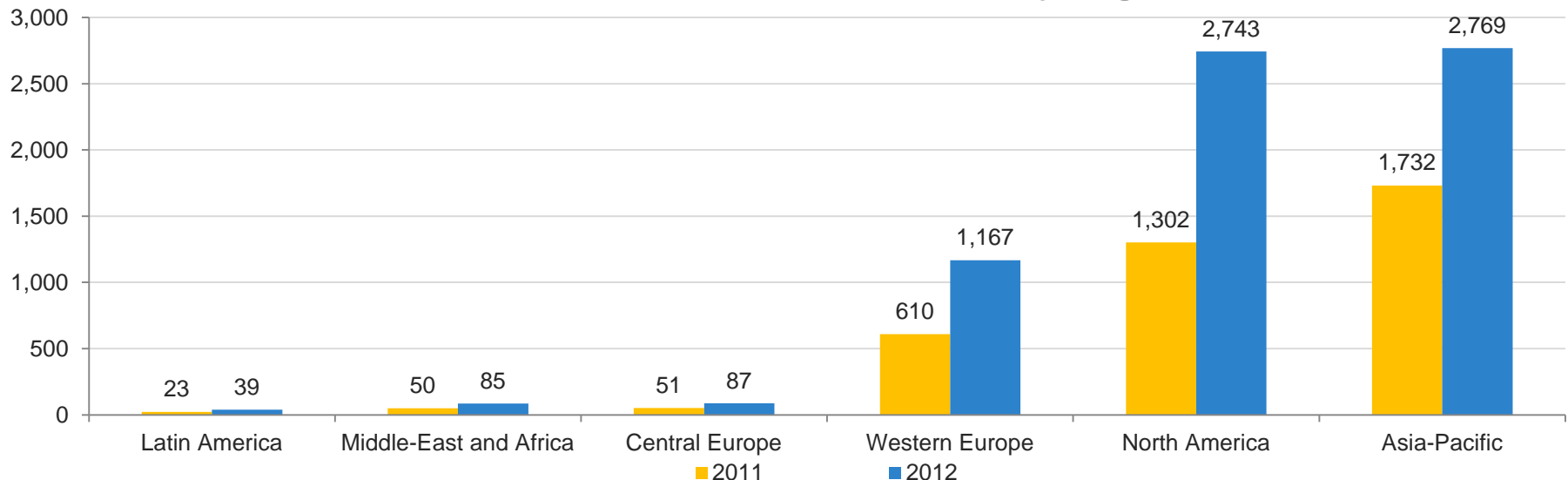
# Asia Pacific and North America head-to-head as rest of world trails behind



## 2012: Mobile ad revenue by region (€m)



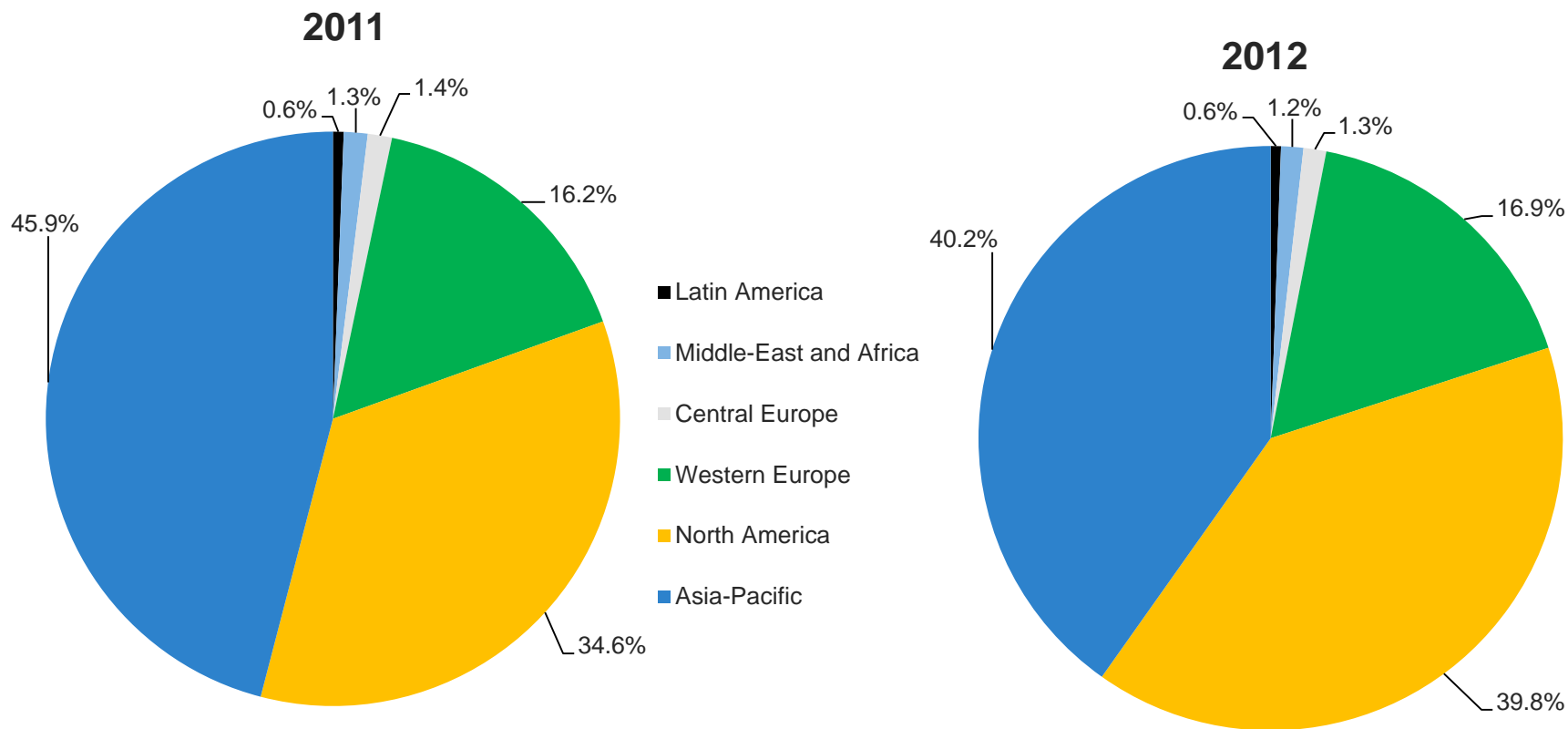
## 2011 vs 2012: Mobile ad revenue by region (€m)



# Asia Pacific region suffers share losses as North America catches up



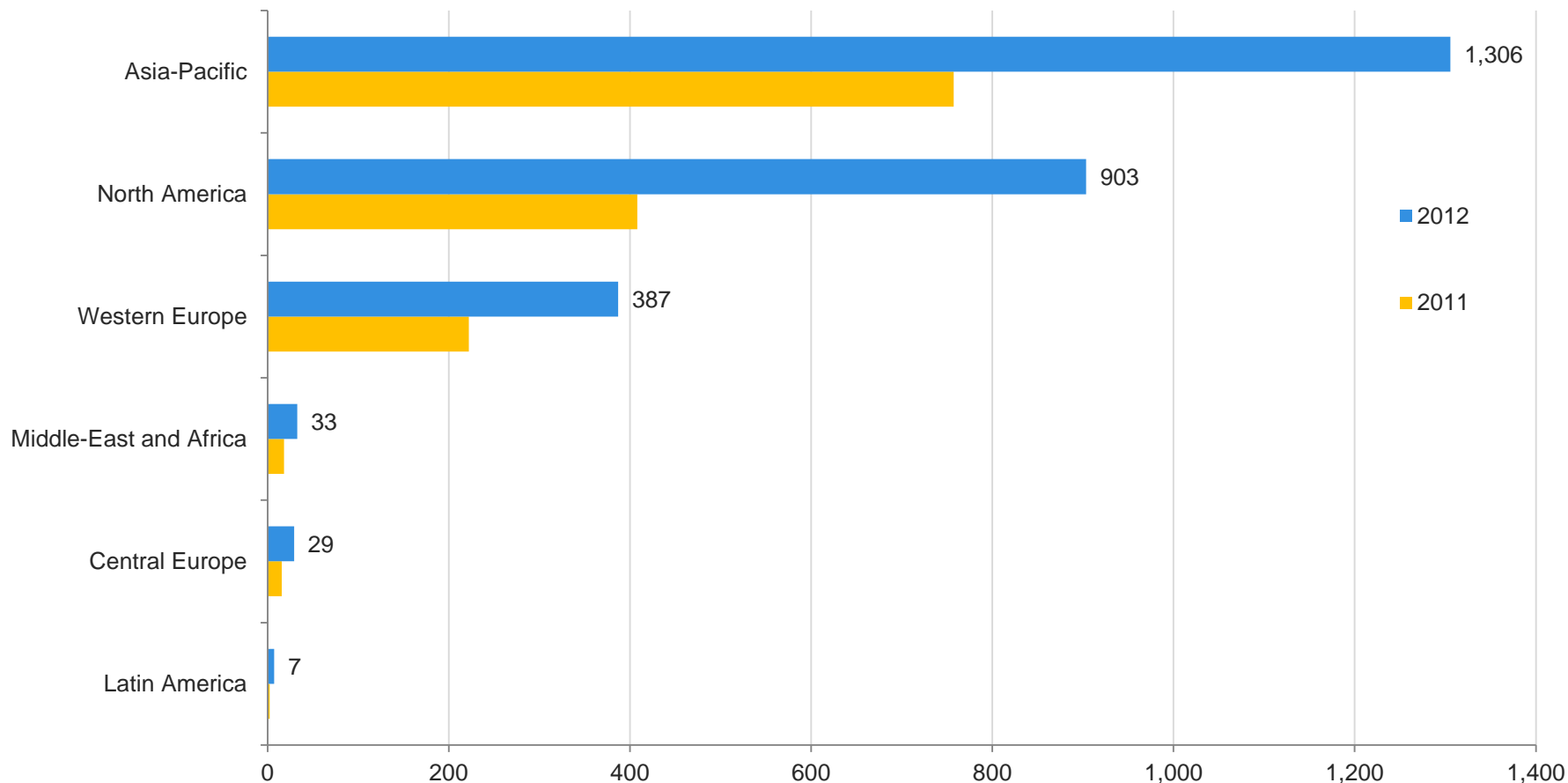
## Global mobile advertising revenue: share by region





# Asia Pacific dominates mobile display market

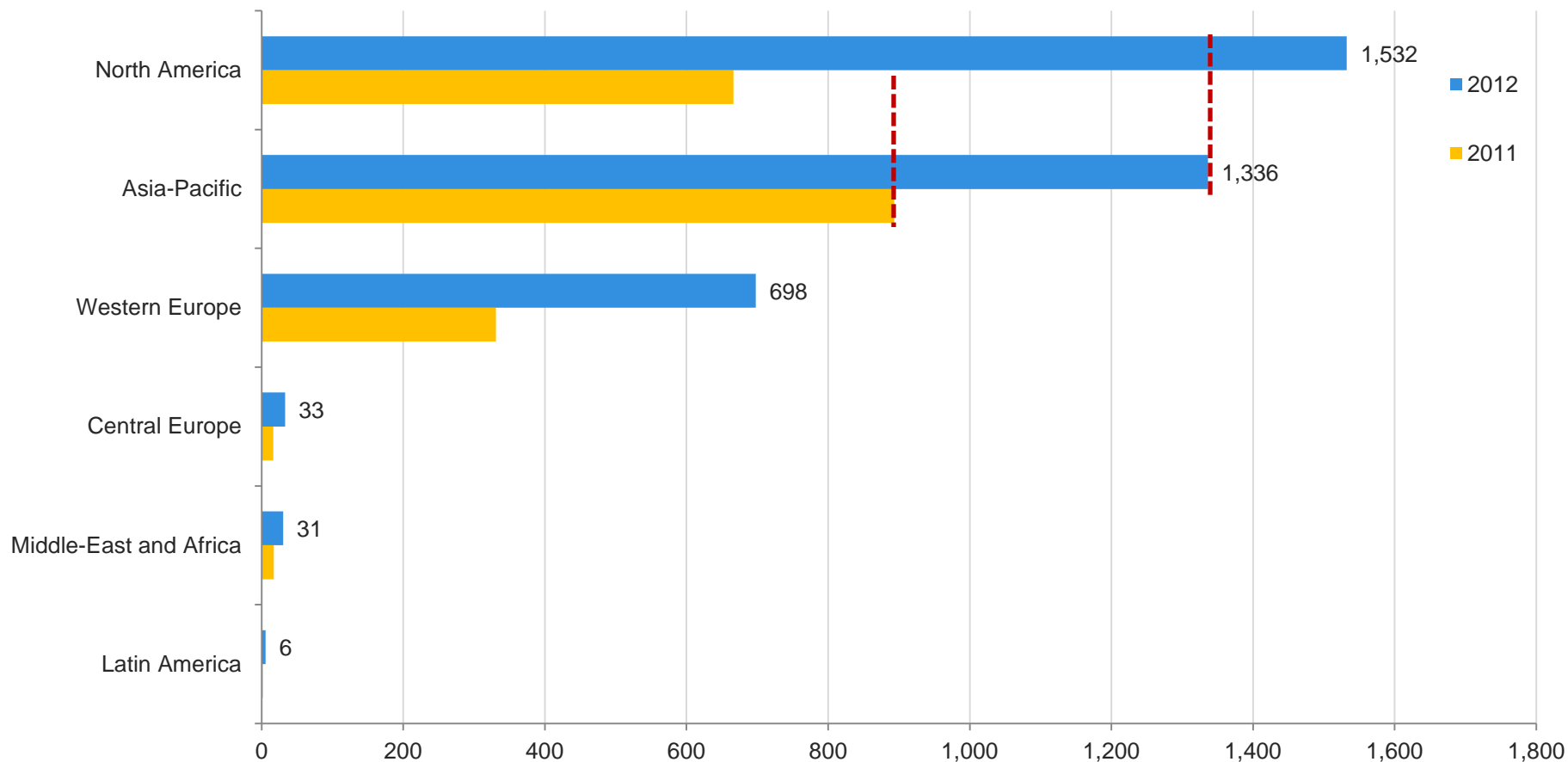
## Mobile display ad revenue 2011 vs 2012 (€m)





# North America overtakes APAC in search

## Mobile search ad revenue 2011 vs 2012 (€m)

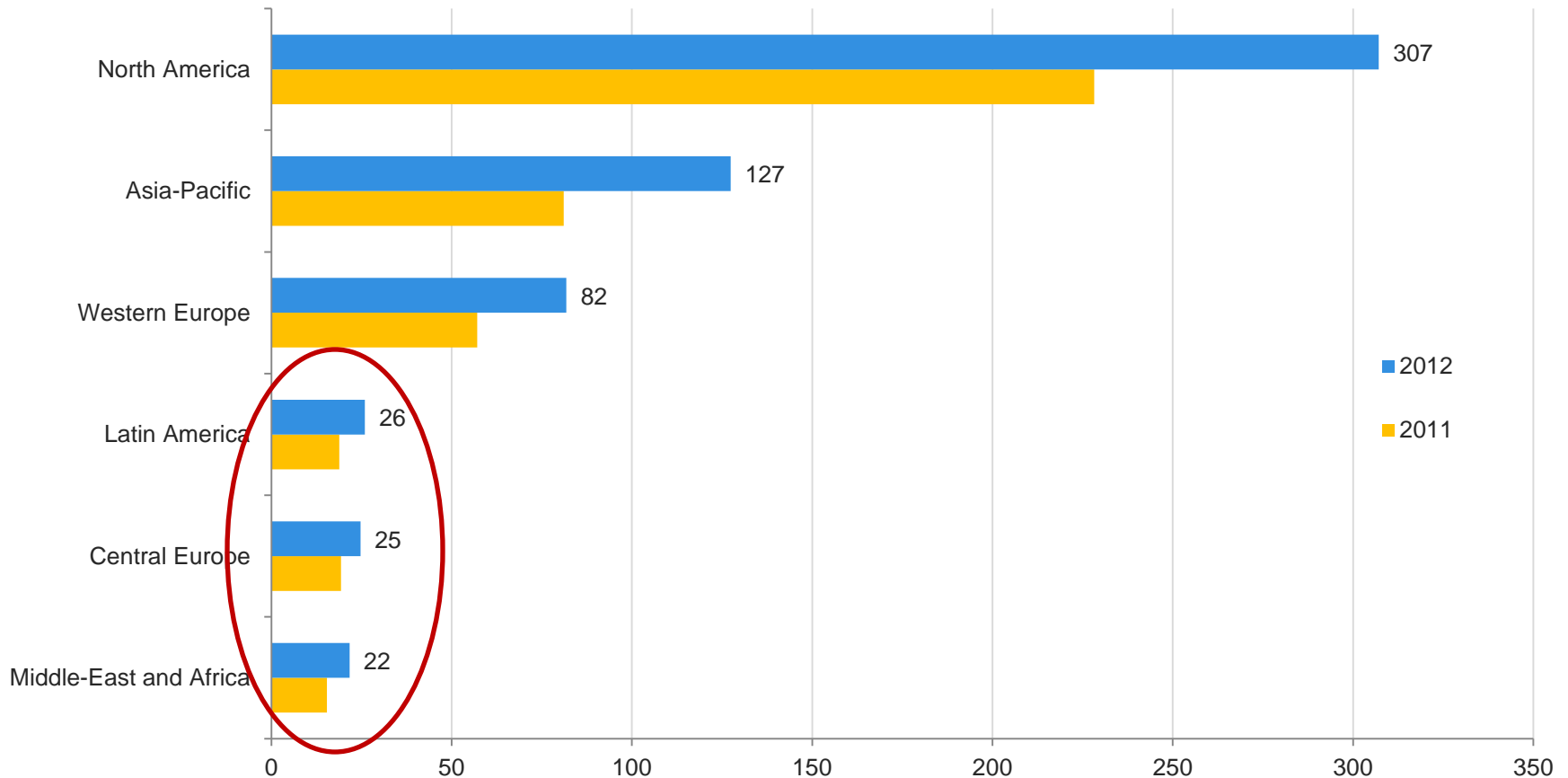




# Gap between smaller mobile ad regions and big players less pronounced in messaging



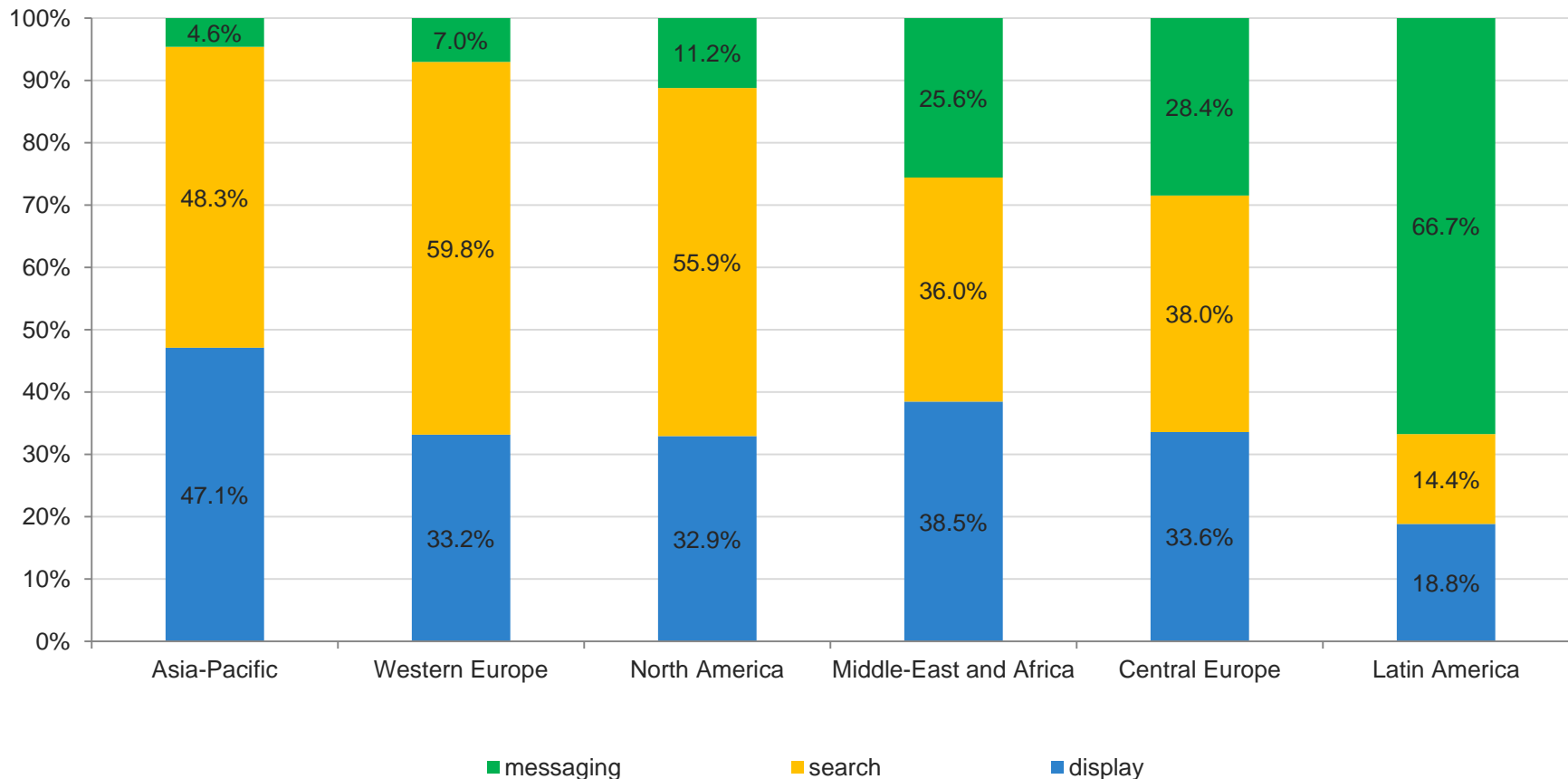
## Mobile messaging ad revenue 2011 vs 2012 (€m)



# Format distribution is not uniform globally, reflects specific regional market structures



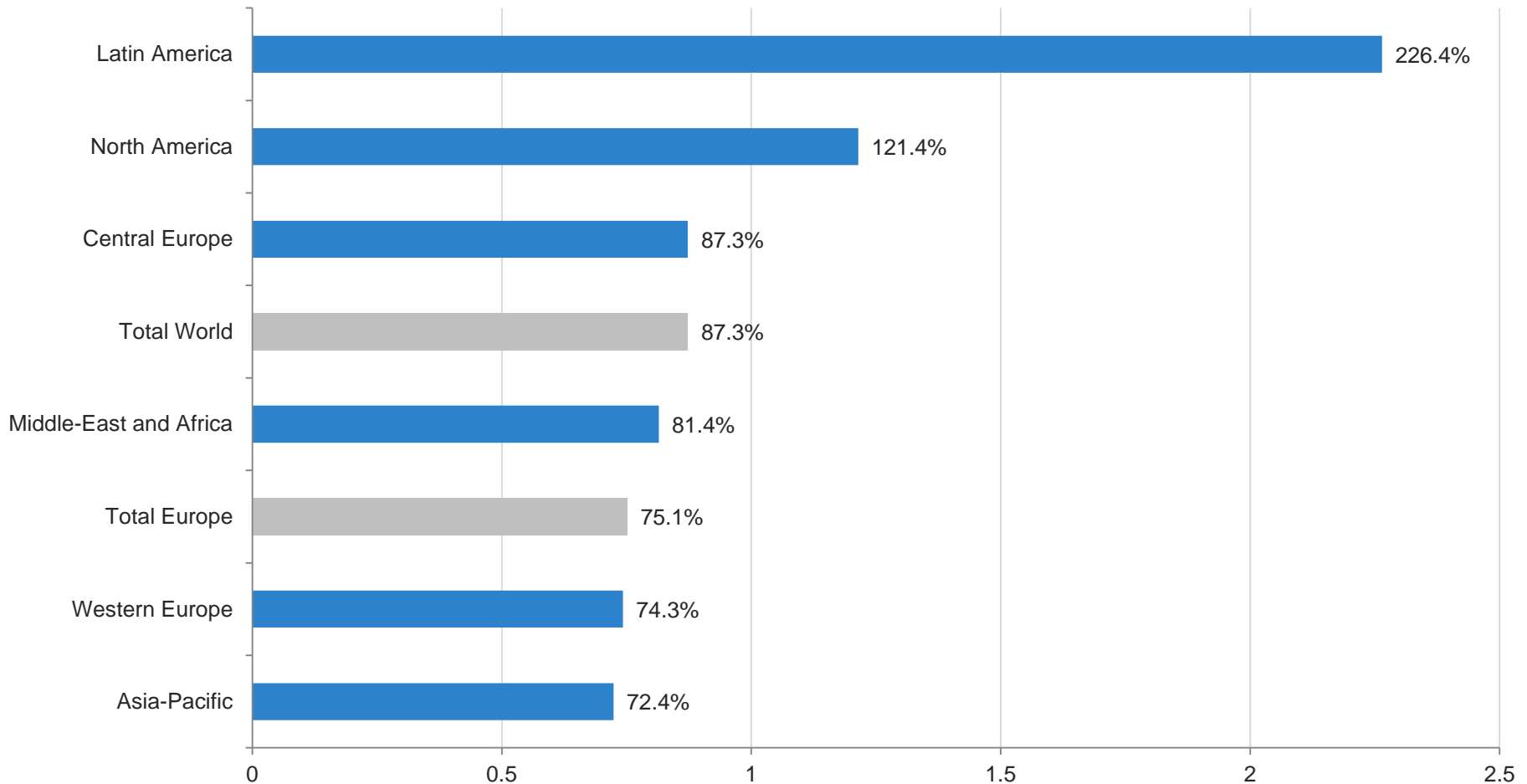
## Mobile ad revenue share by format: regions



# LATAM display grows nearly twice as fast as North American market



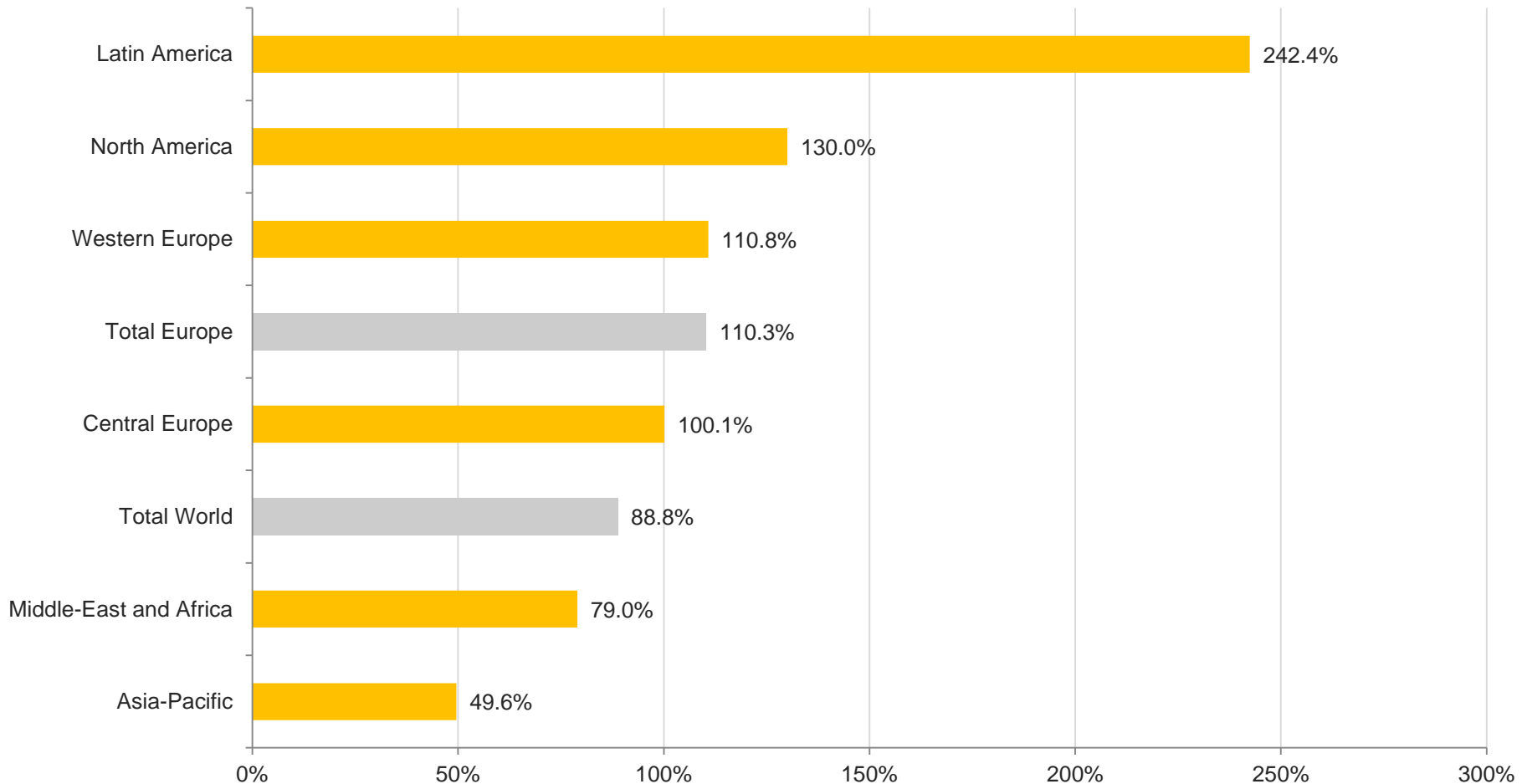
## Mobile display ad growth in 2012 by region



# Also in search growth, LATAM leads; APAC trend decoupled from rest of world



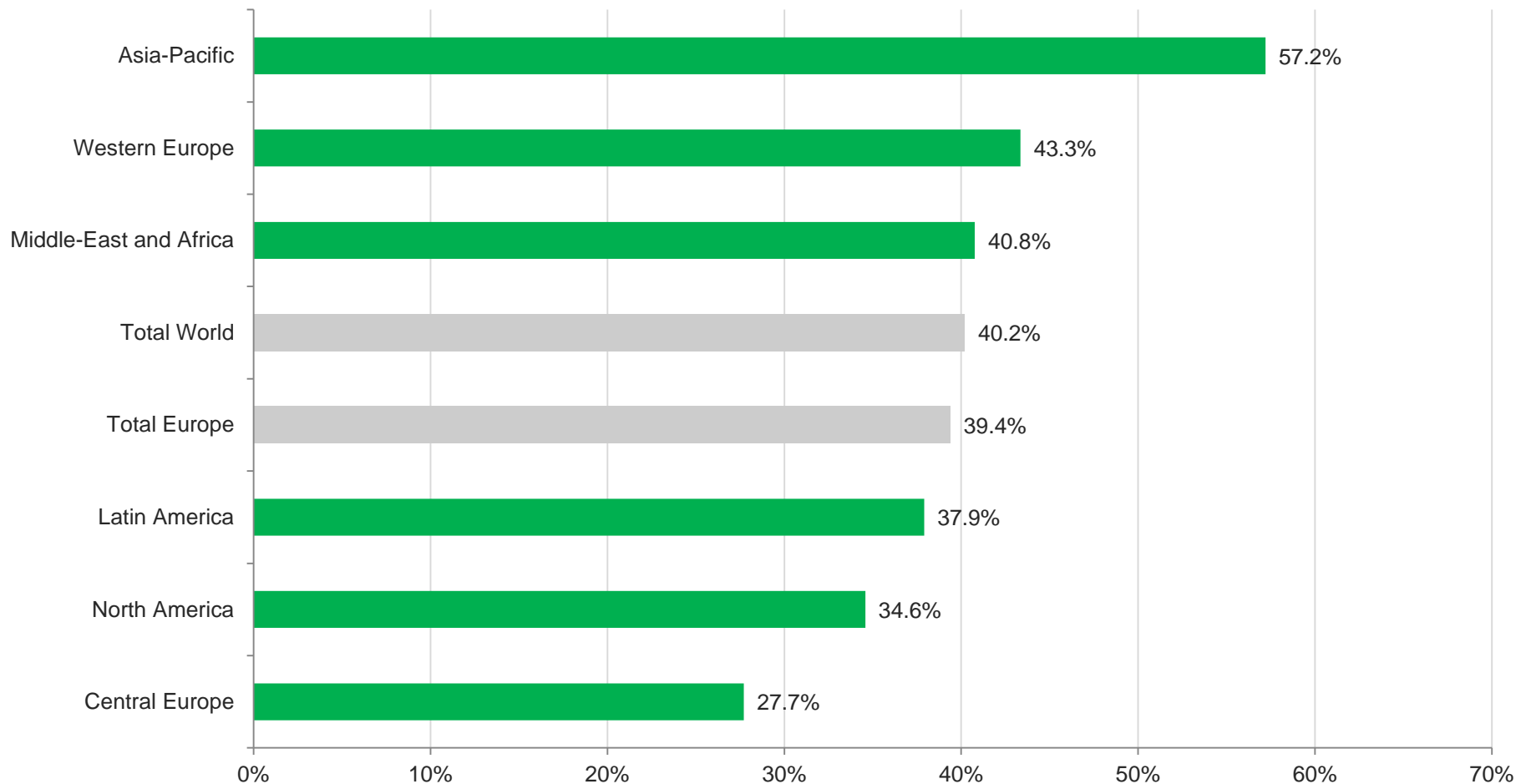
## Mobile search ad growth in 2012 by region



# In contrast to other formats, APAC leads in messaging growth



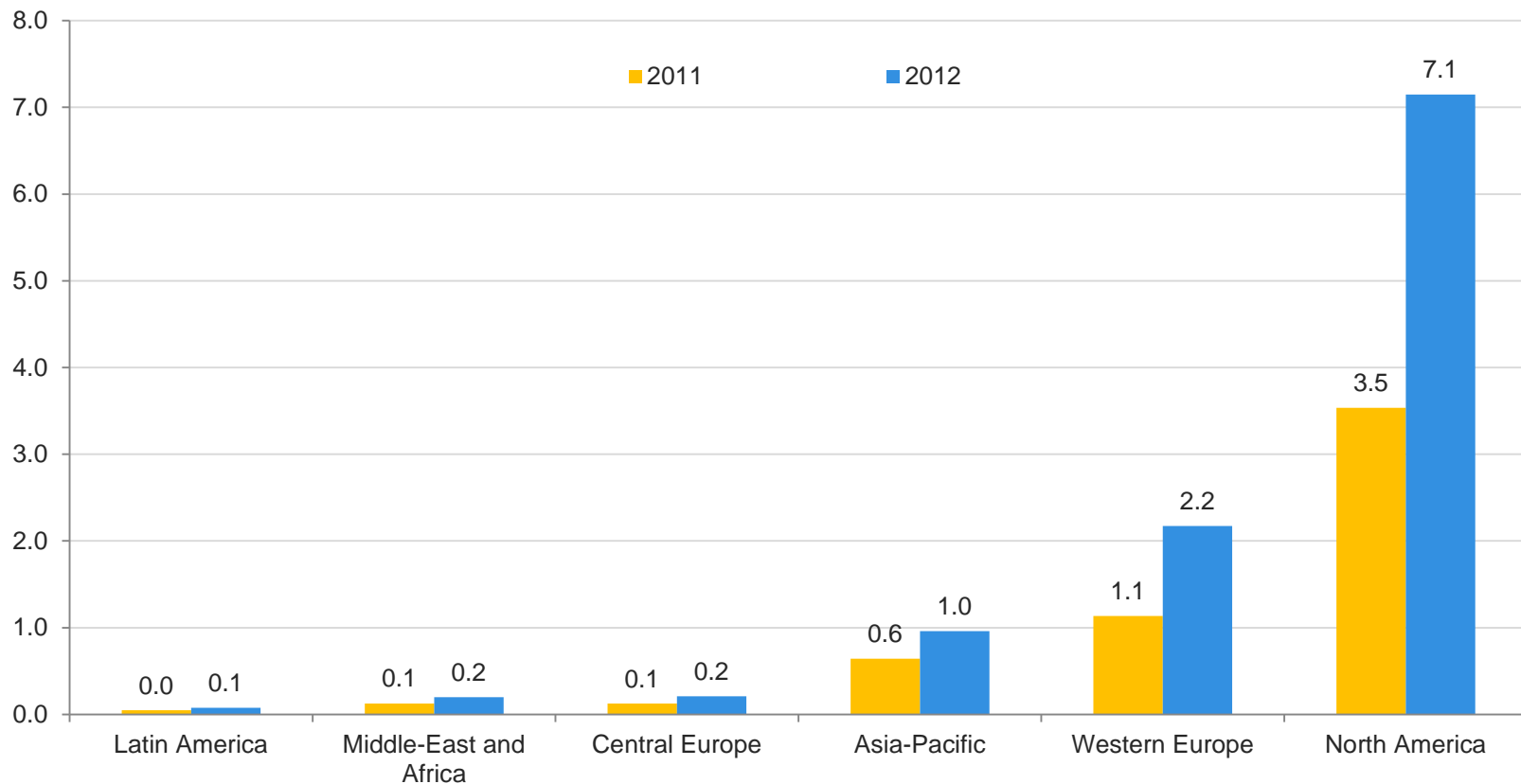
## Mobile messaging ad growth in 2012 by region



# Benchmarking mobile ad spend reveals monetization gaps across regions



**Mobile ad spend per mobile subscription (€)**





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# Thank you

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