



AUGUST 2014

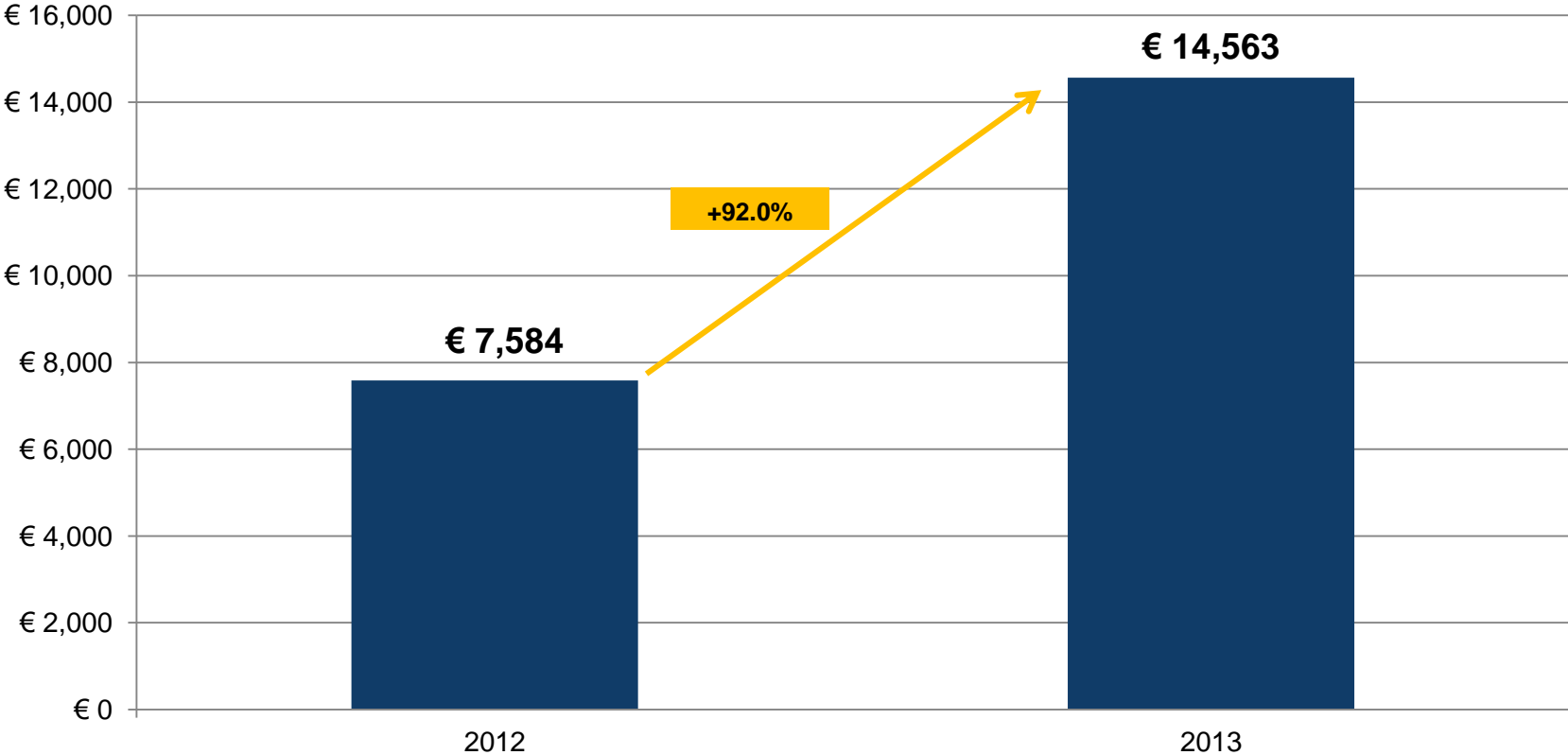
Global Mobile Advertising Revenue 2013

The State of Mobile Advertising Around the World

Global mobile advertising revenue nearly doubled in 2013



Global mobile ad revenue (€m)*

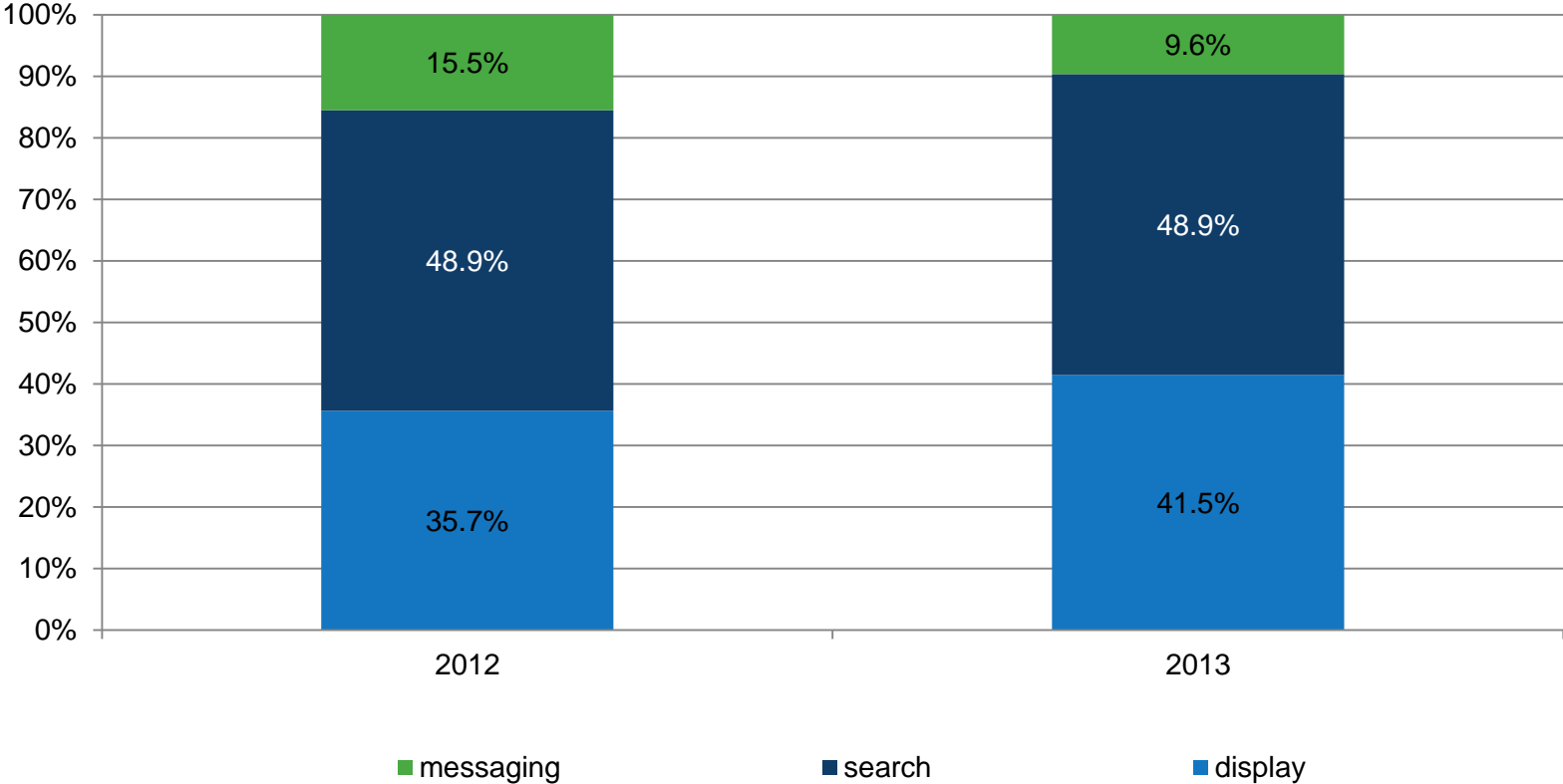


**All data in this presentation is in constant 2013 EUR. Constant exchange rates have been used in order to eliminate currency effects on the growth rate.*

Display expands its share of mobile advertising as messaging faces pressure

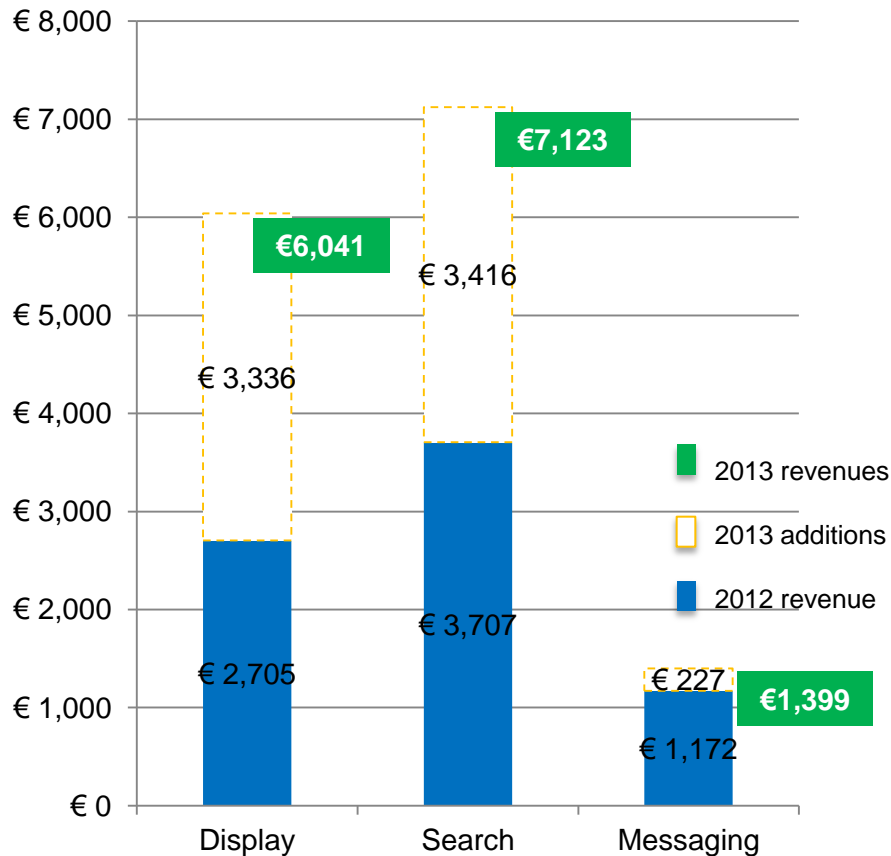


Global mobile ad revenue by format

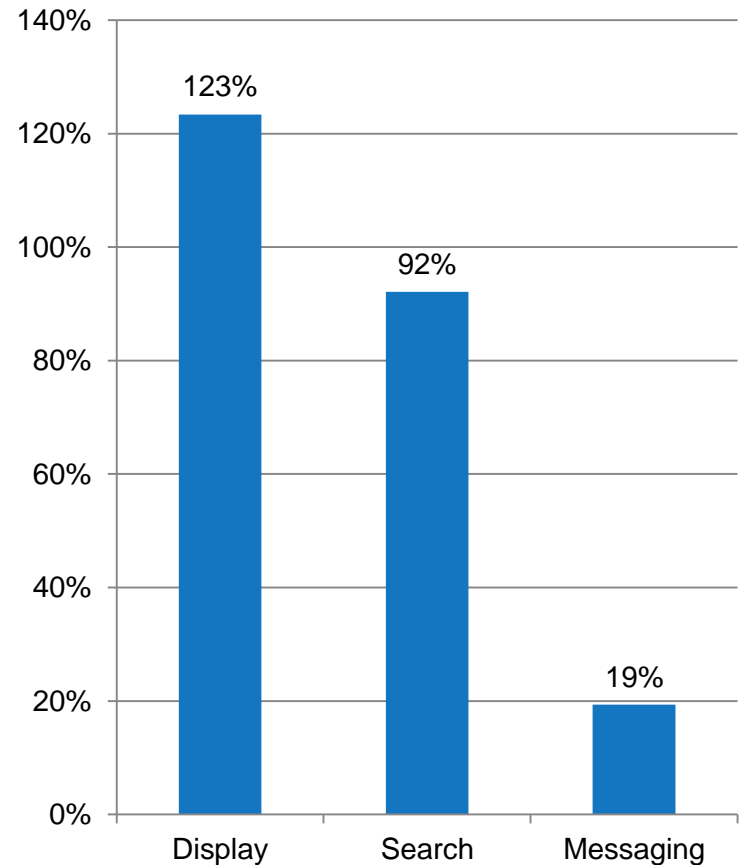


Mobile display advertising revenues more than doubles as growth outperformed other formats

2013 revenue gains over 2012 (€m)

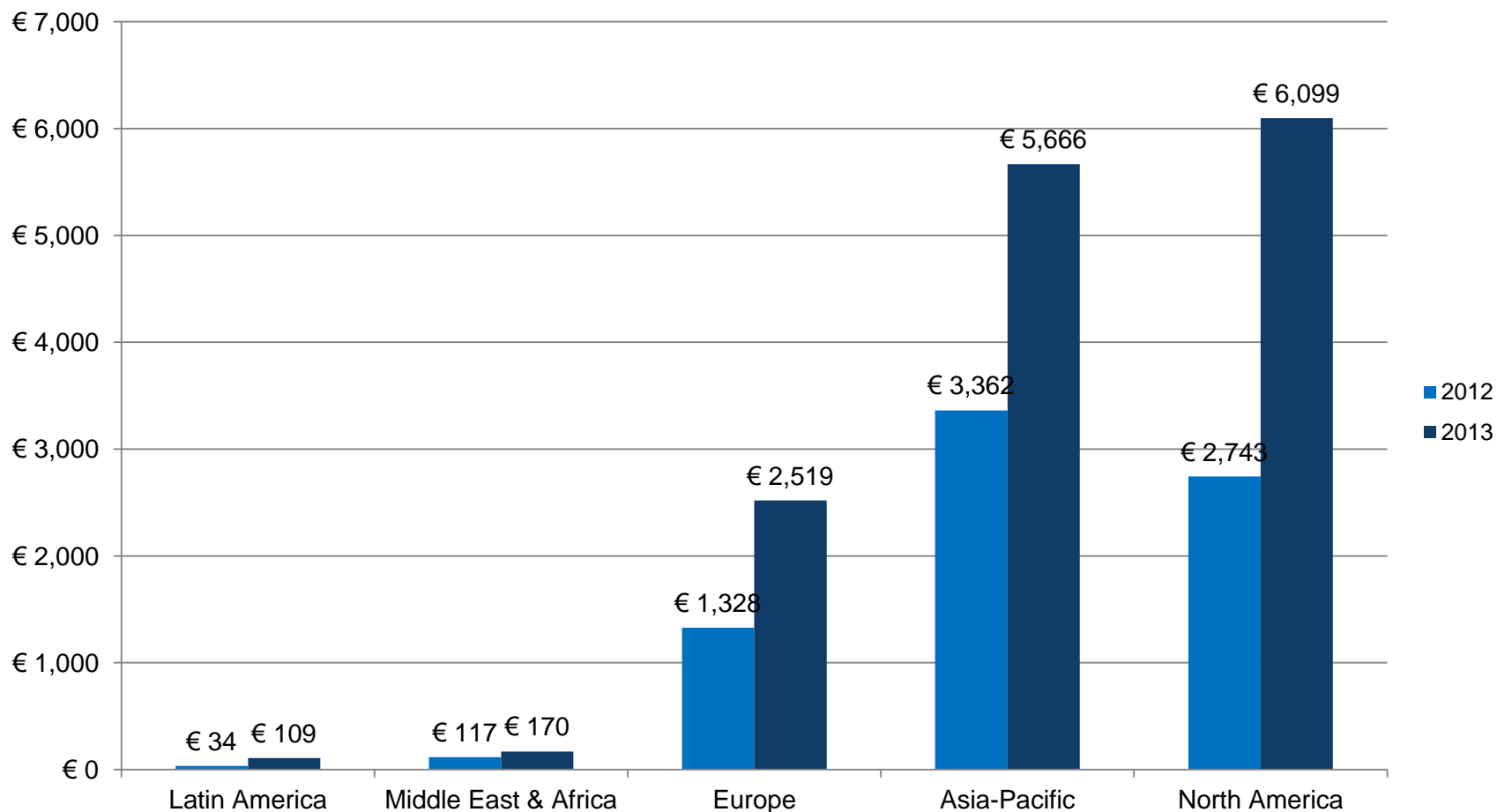


Mobile ad growth in 2013 by format (%)



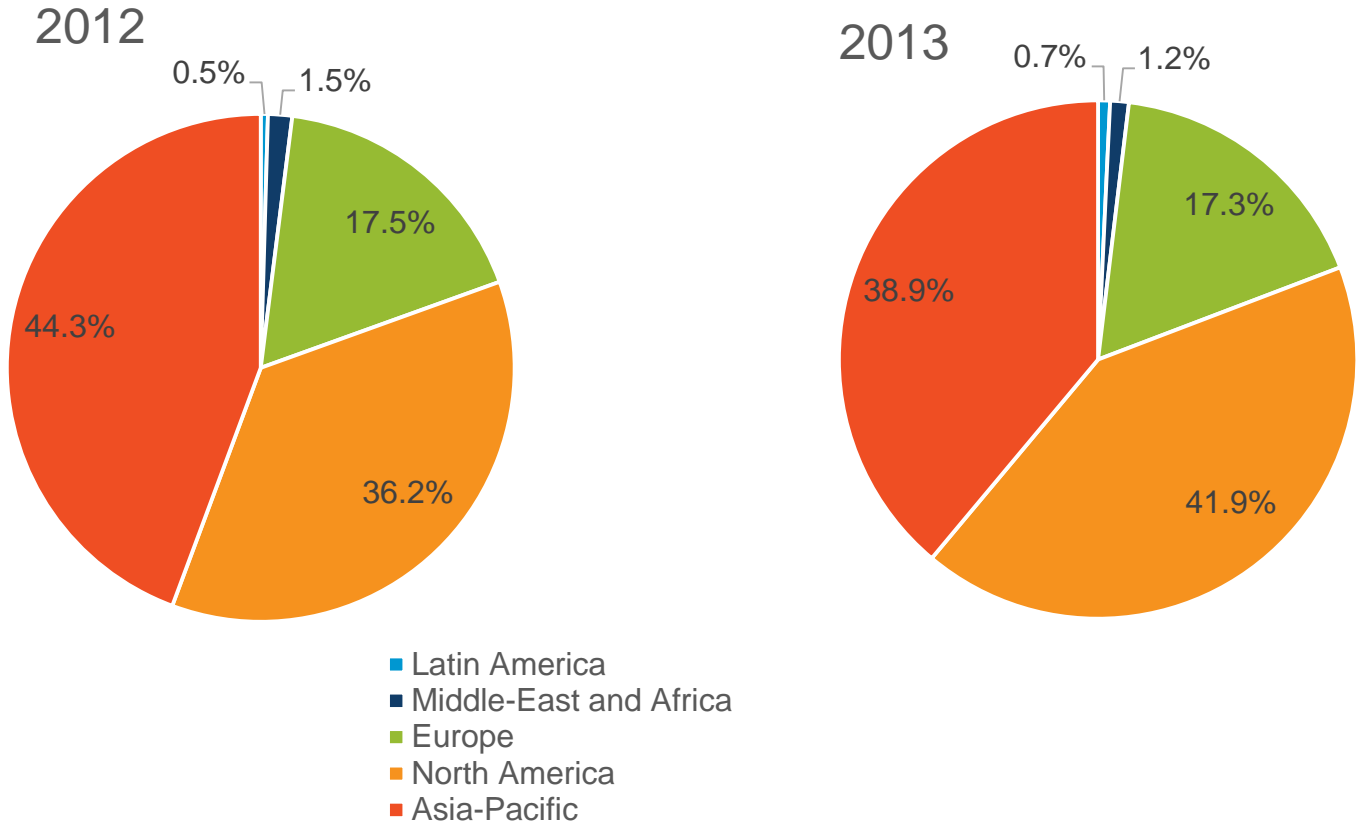
North America overtakes Asia-Pacific as largest mobile advertising market

2012 vs 2013: Mobile ad revenues by region (€m)



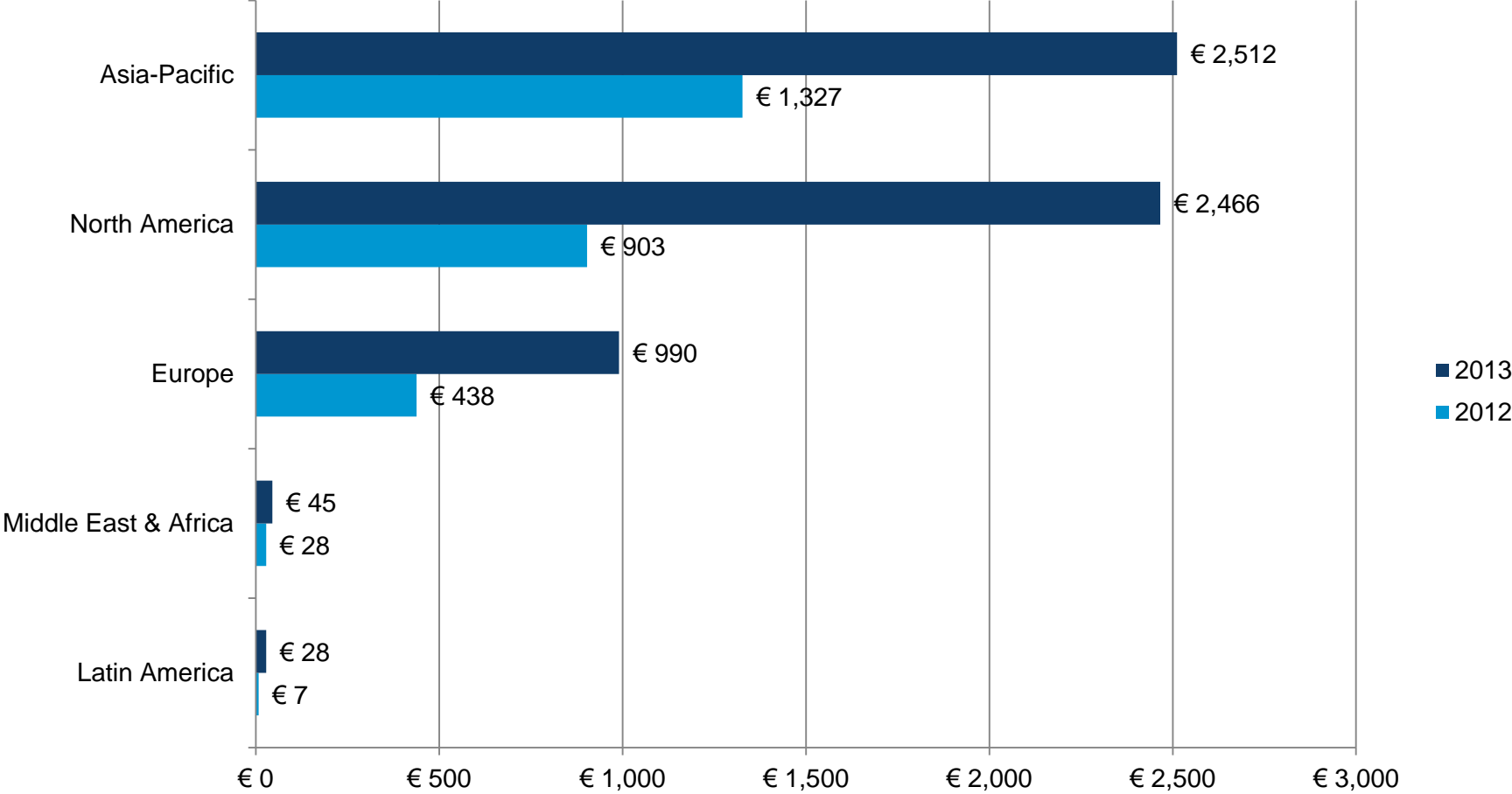
Share gains for all regions apart from Asia-Pacific and Middle East & Africa

Global mobile advertising revenue: share by region



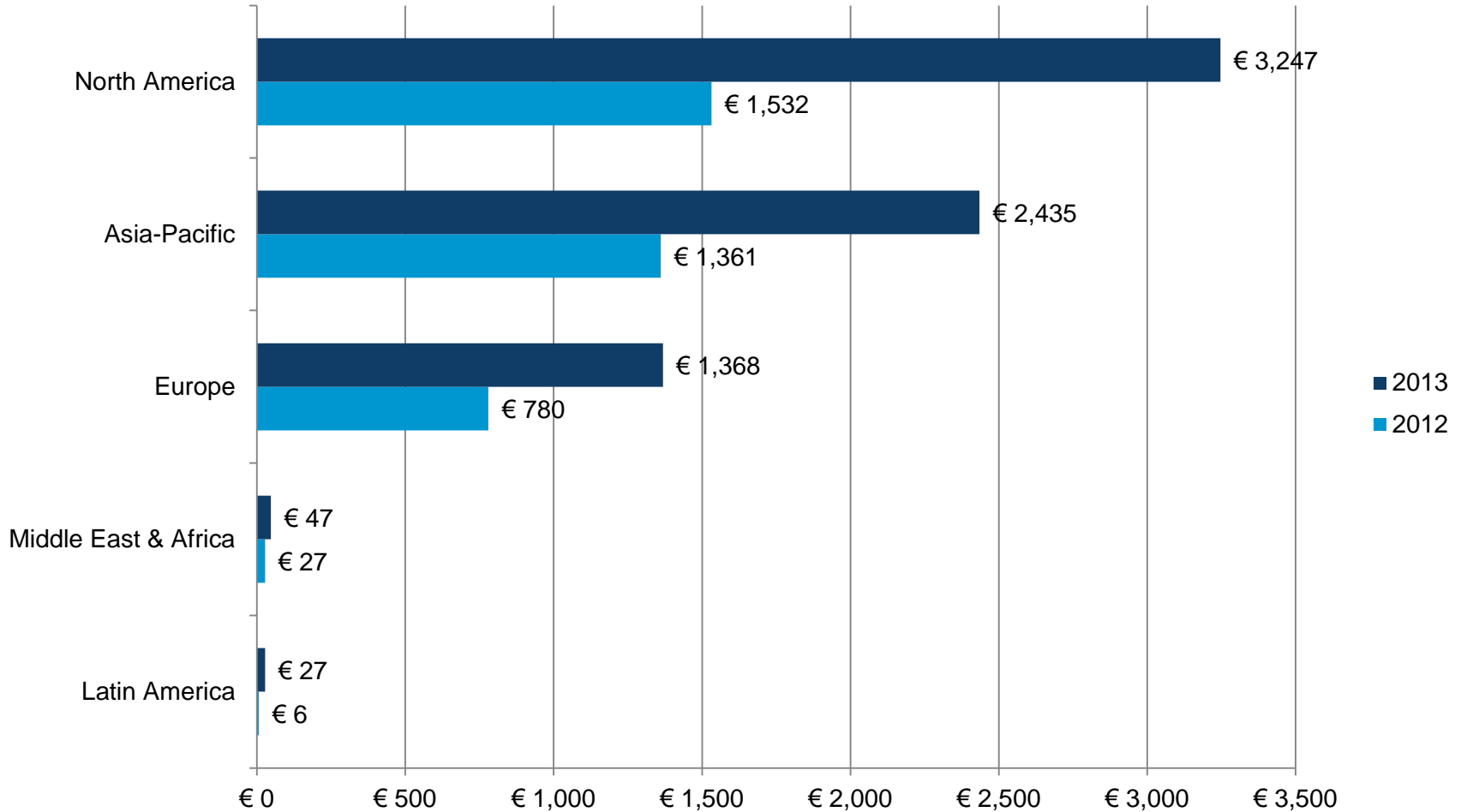
Asia-Pacific maintains marginal lead in mobile display advertising ahead of rapidly growing North American market

2012 vs 2013: Mobile display ad revenues by region (€m)



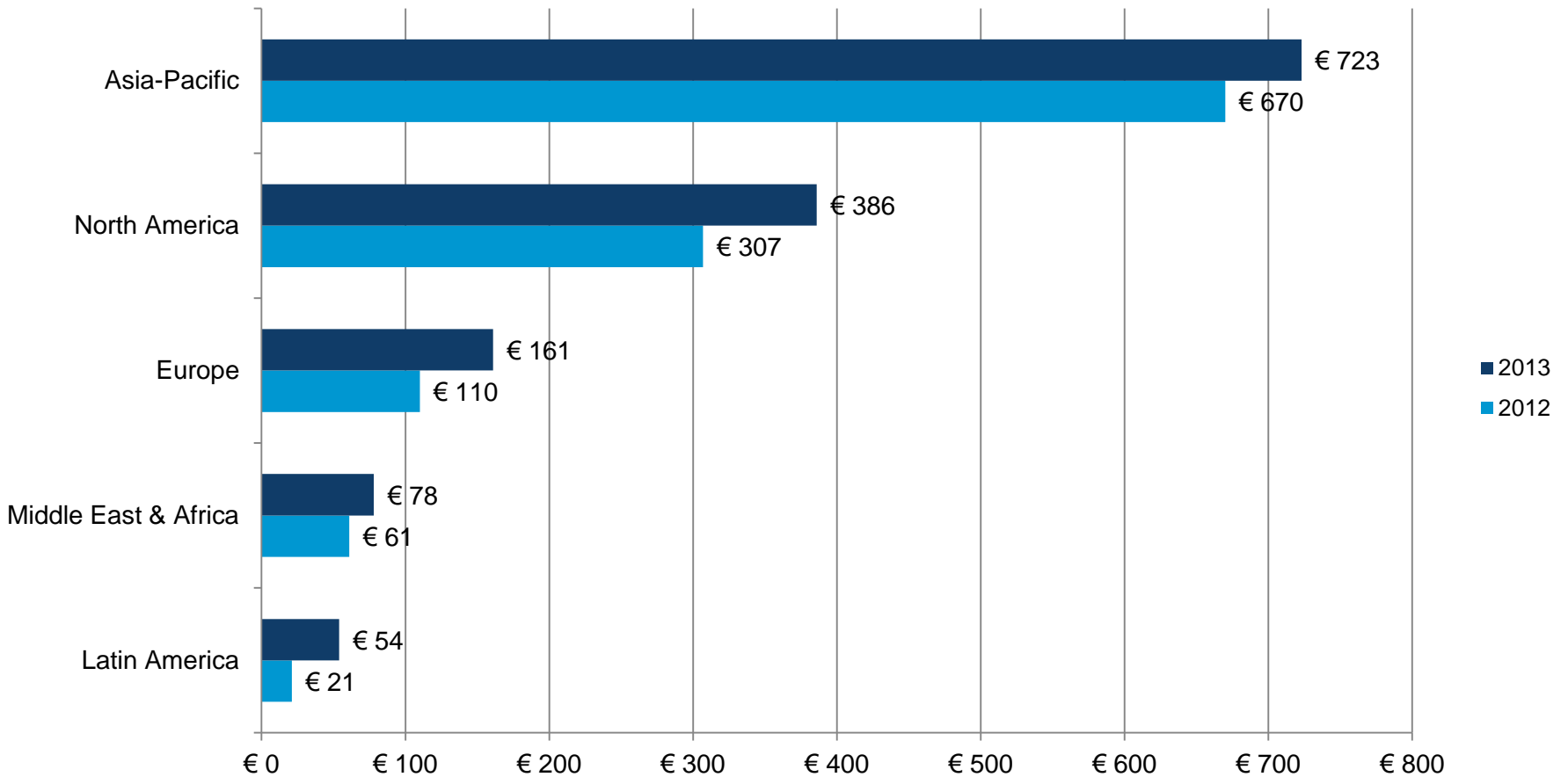
Unchanged regional ranking in mobile search advertising

2012 vs 2013: Mobile search ad revenues by region (€m)



Gap between smaller and larger mobile advertising regions is less pronounced in messaging

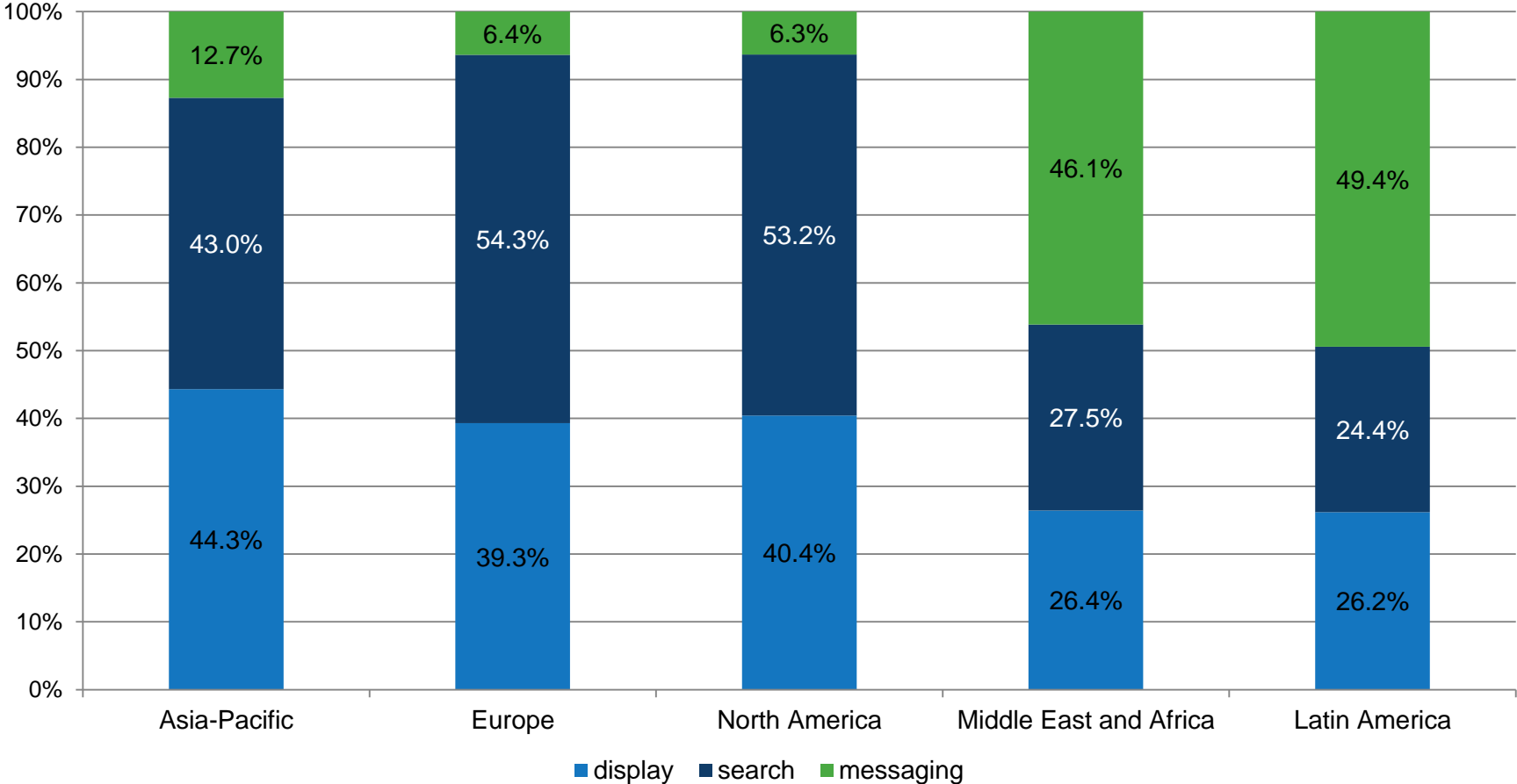
Mobile messaging ad revenues 2012 vs 2013 (€m)



Strong differences across format distribution globally

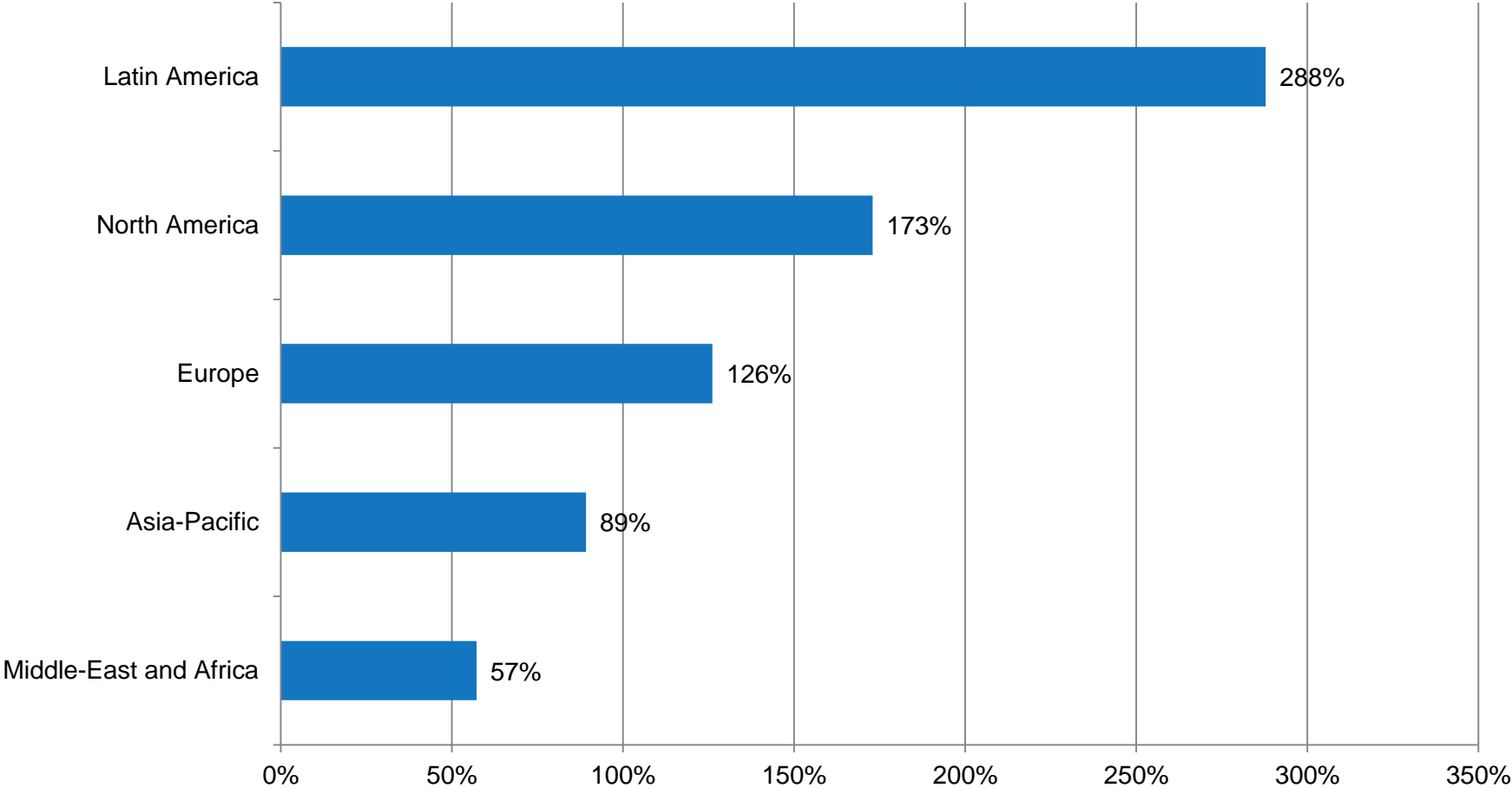


Mobile ad revenue by format: regions



Latin American mobile display market grows 5x faster than market in Middle East and Africa

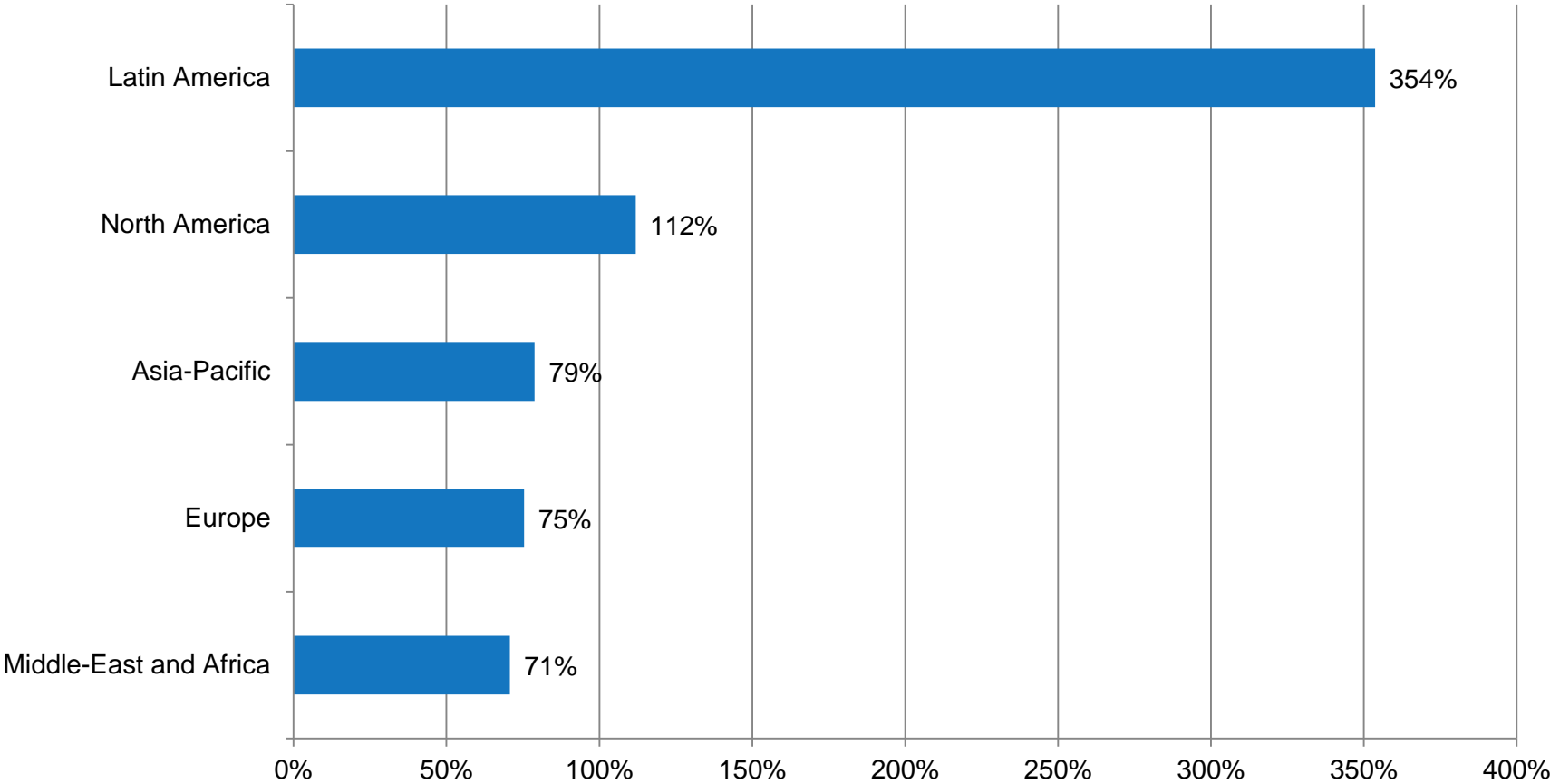
Mobile display ad growth in 2013 by region



Mobile search growth in Latin America decoupled from relatively homogenous growth in other regions

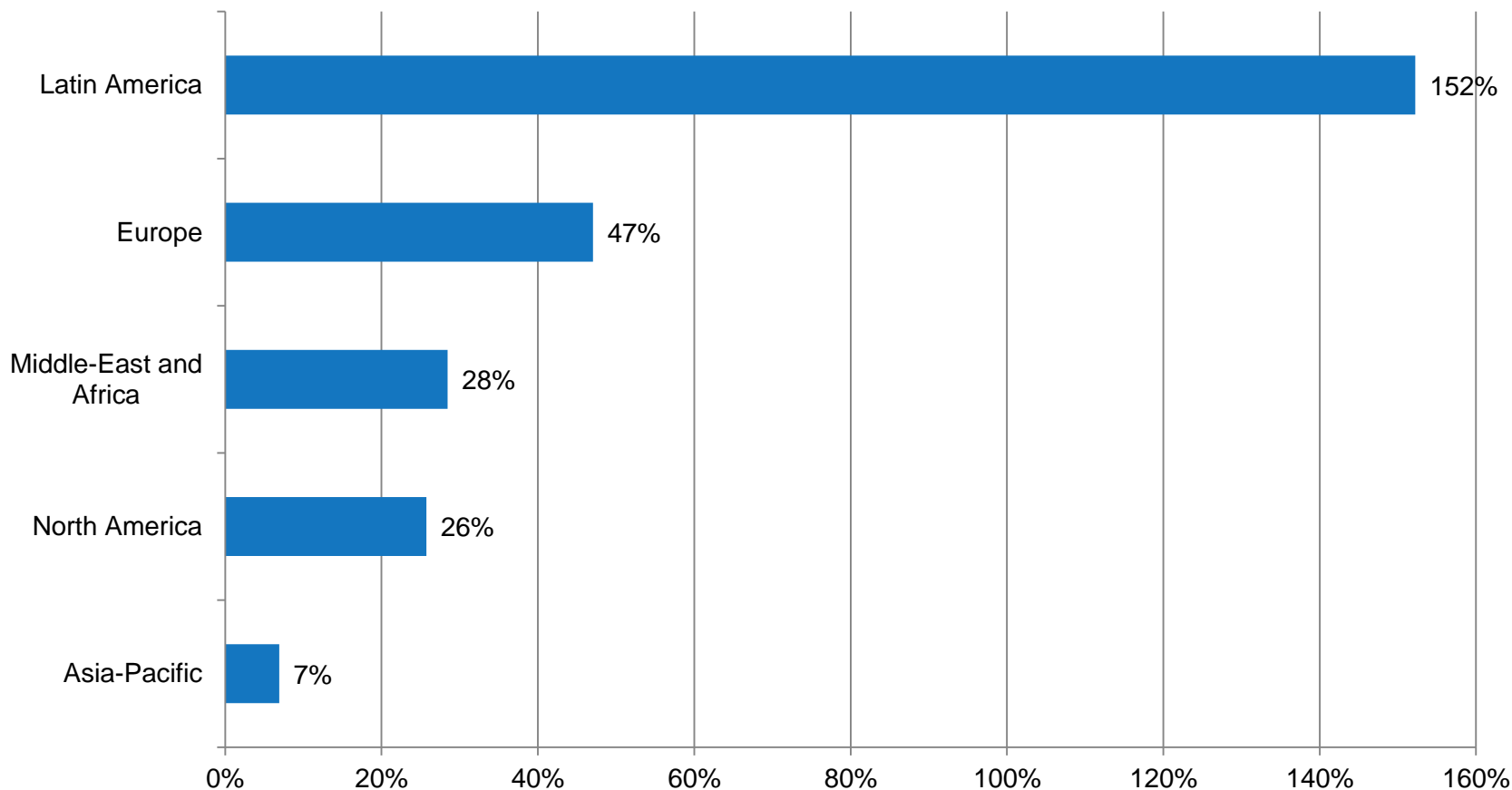


Mobile search ad growth in 2013 by region



Maturity of messaging advertising evident in Asia Pacific, but format still commands triple-digit growth in Latin America

Mobile messaging ad growth in 2013 by region



Thanks

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