

BRUSSELS, LONDON & NEW YORK 13 AUGUST 2015

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# Global Mobile Advertising Revenue 2014

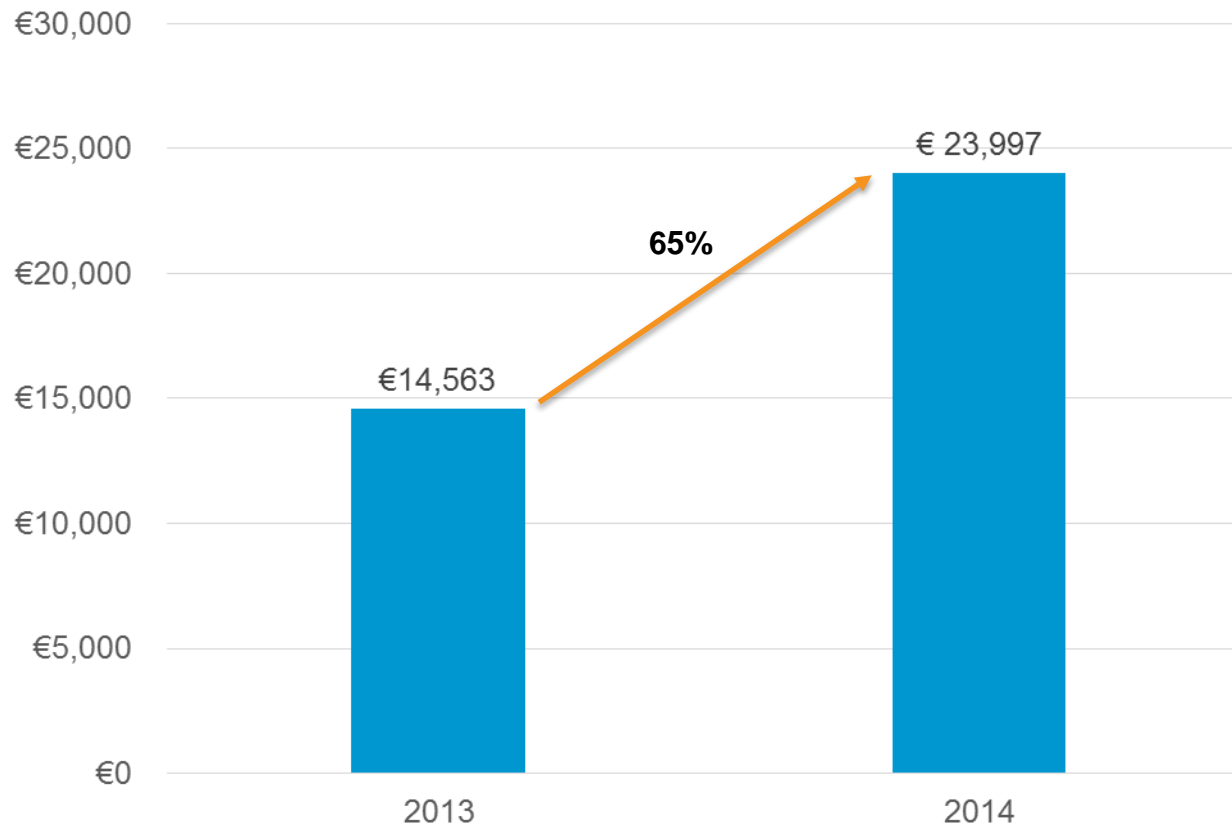
## The State of Mobile Advertising Around the World

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# Global mobile advertising revenue up 65% year-on-year to €24bn

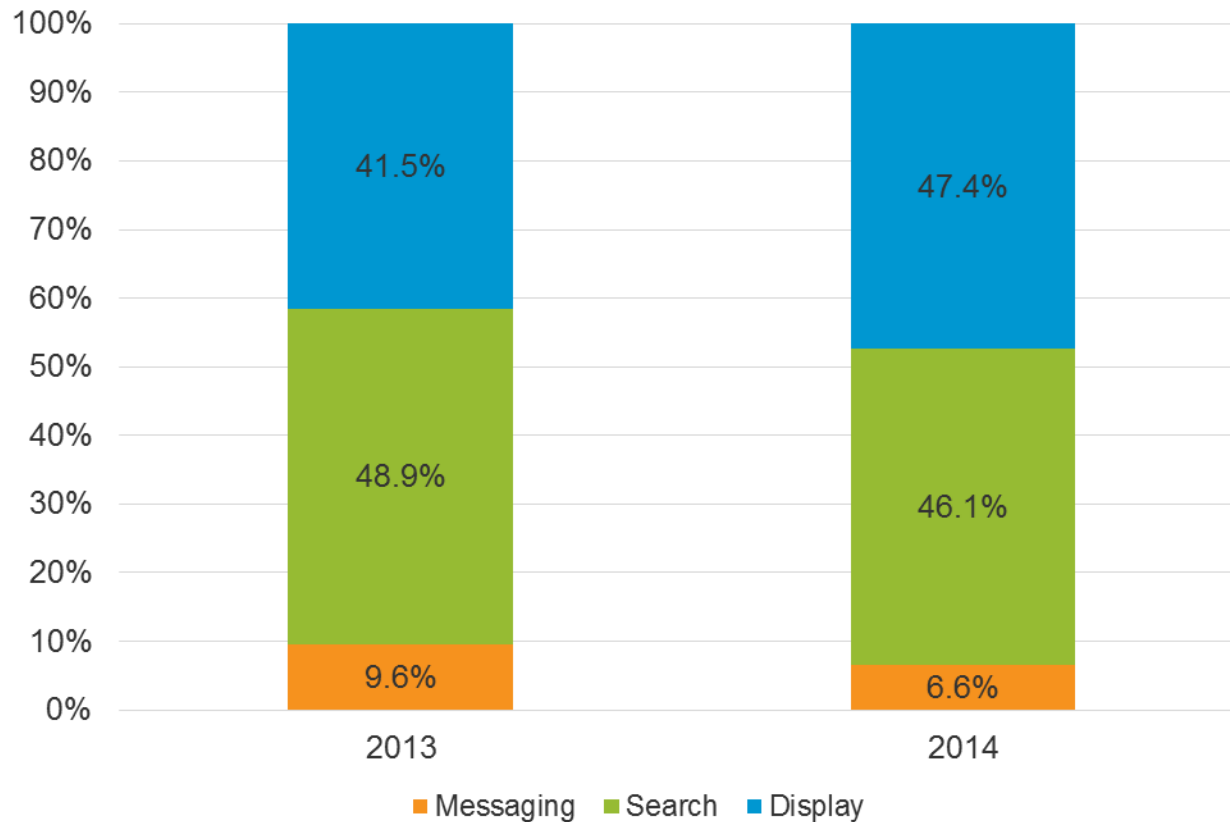
Global mobile ad revenue (€m)\*



*\*All data in this presentation is in constant 2014 EUR. Constant exchange rates have been used in order to eliminate currency effects on the growth rate.*

Source: IAB Europe, IAB, IHS

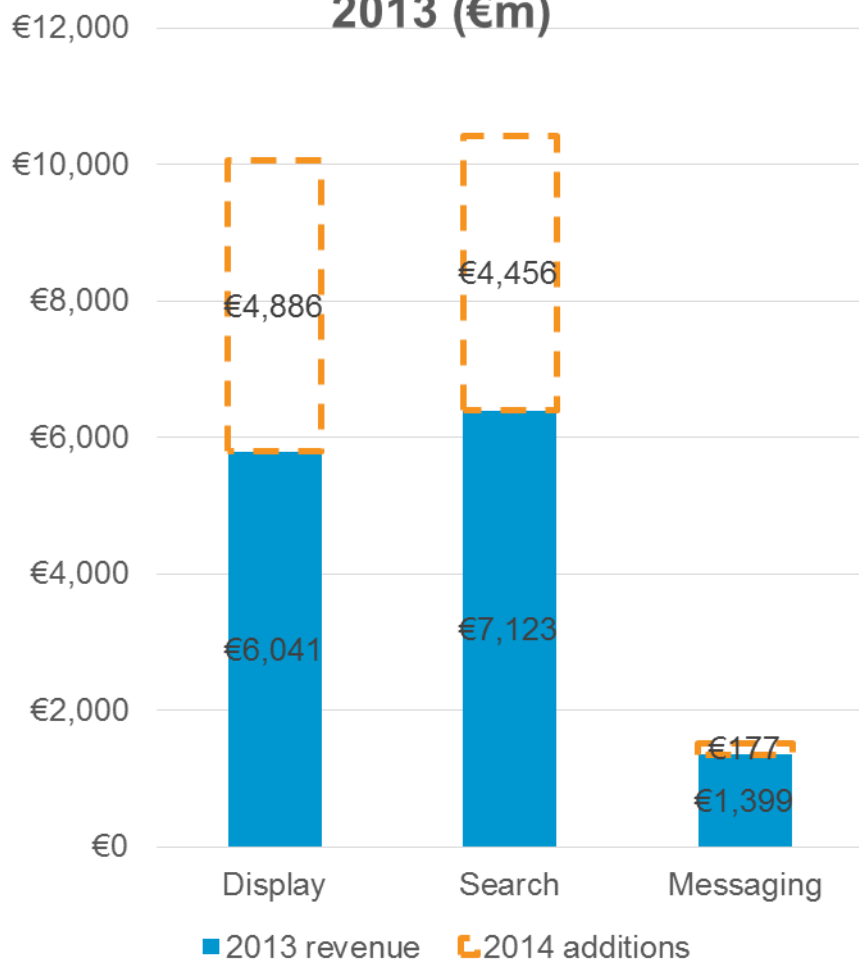
# Display expands its share of mobile advertising further as messaging faces further pressure



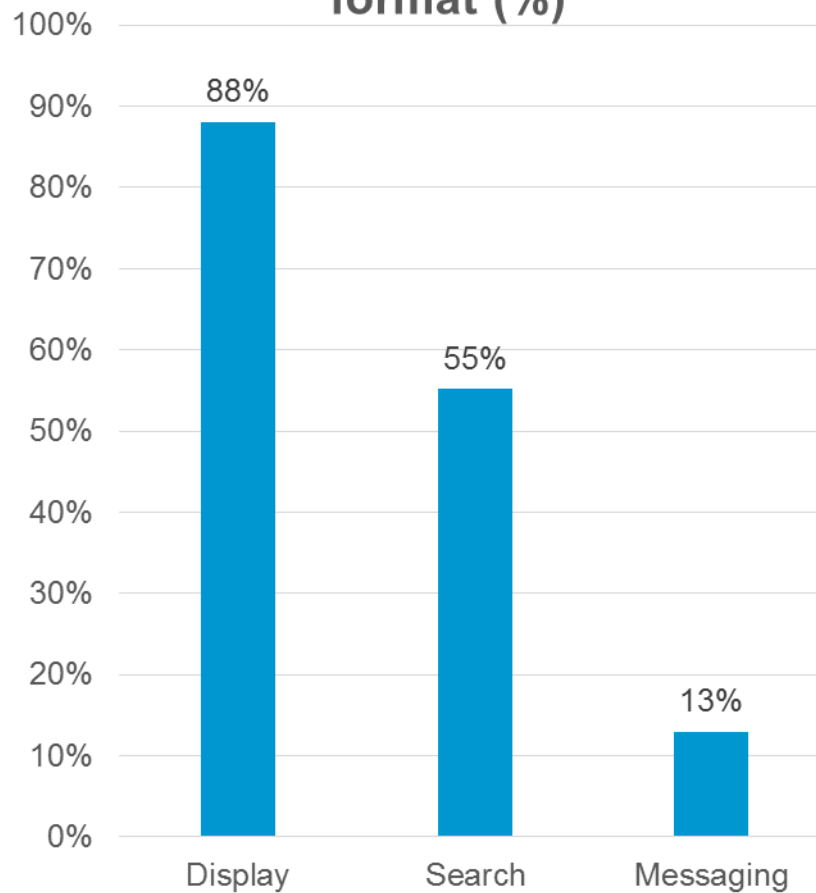
Source: IAB Europe, IAB, IHS

# Mobile display advertising revenue growth outperforms other formats

## 2014 revenue gains over 2013 (€m)



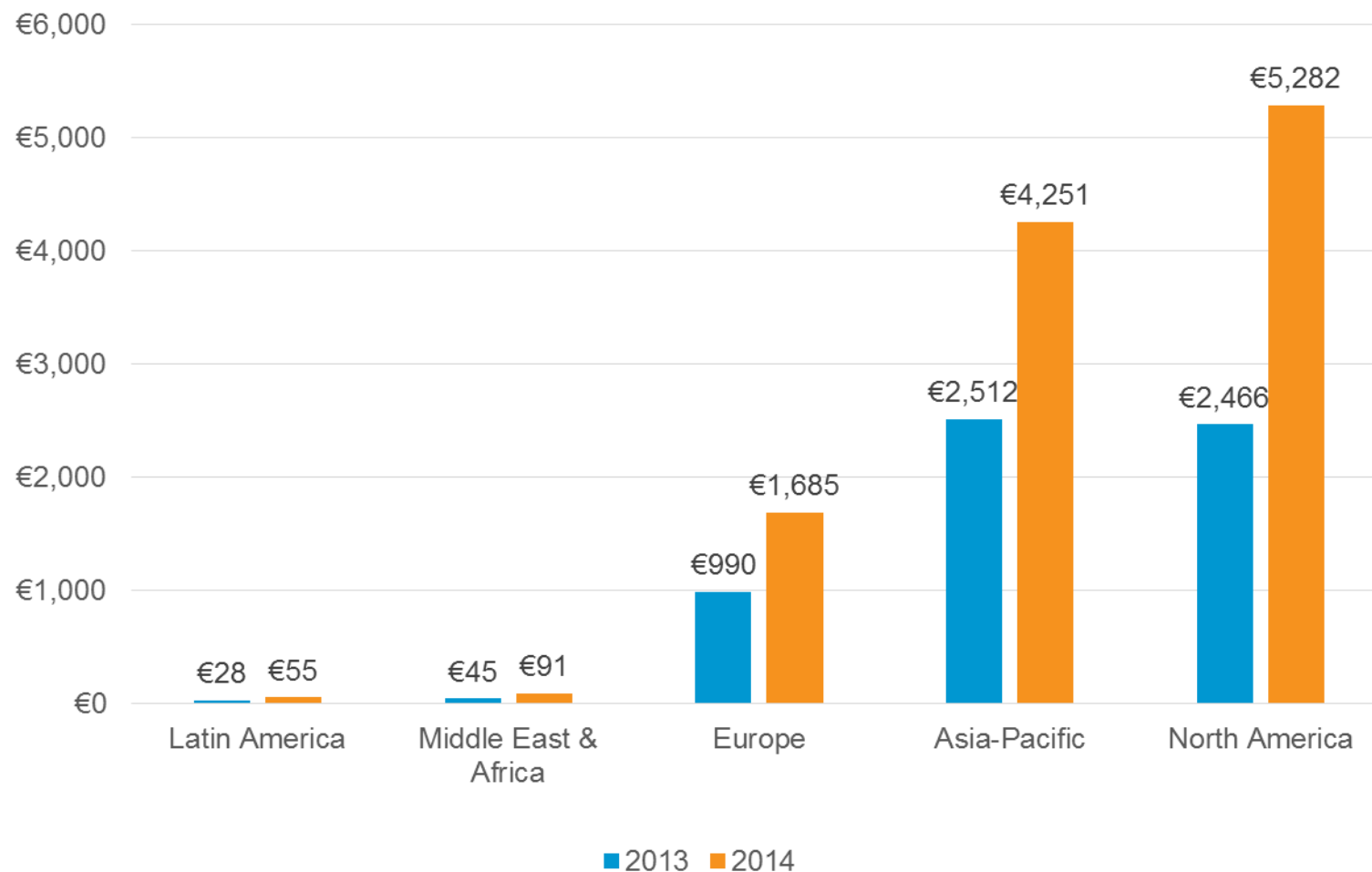
## Mobile ad growth in 2014 by format (%)



Source: IAB Europe, IAB, IHS

# North America remains the largest mobile advertising market

## 2013 vs 2014: Mobile ad revenues by region (€m)



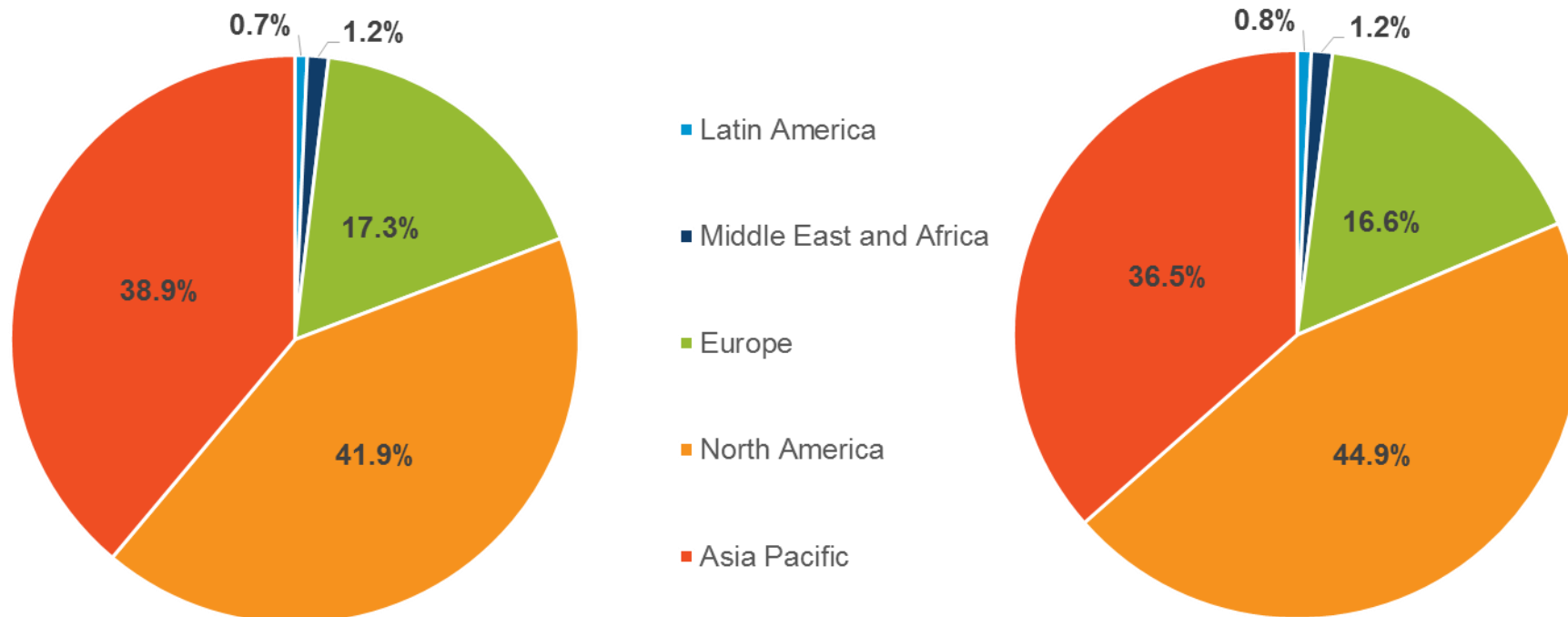
Source: IAB Europe, IAB, IHS

# Minor changes in share of global mobile advertising revenue

## Global mobile advertising revenue: share by region

2013

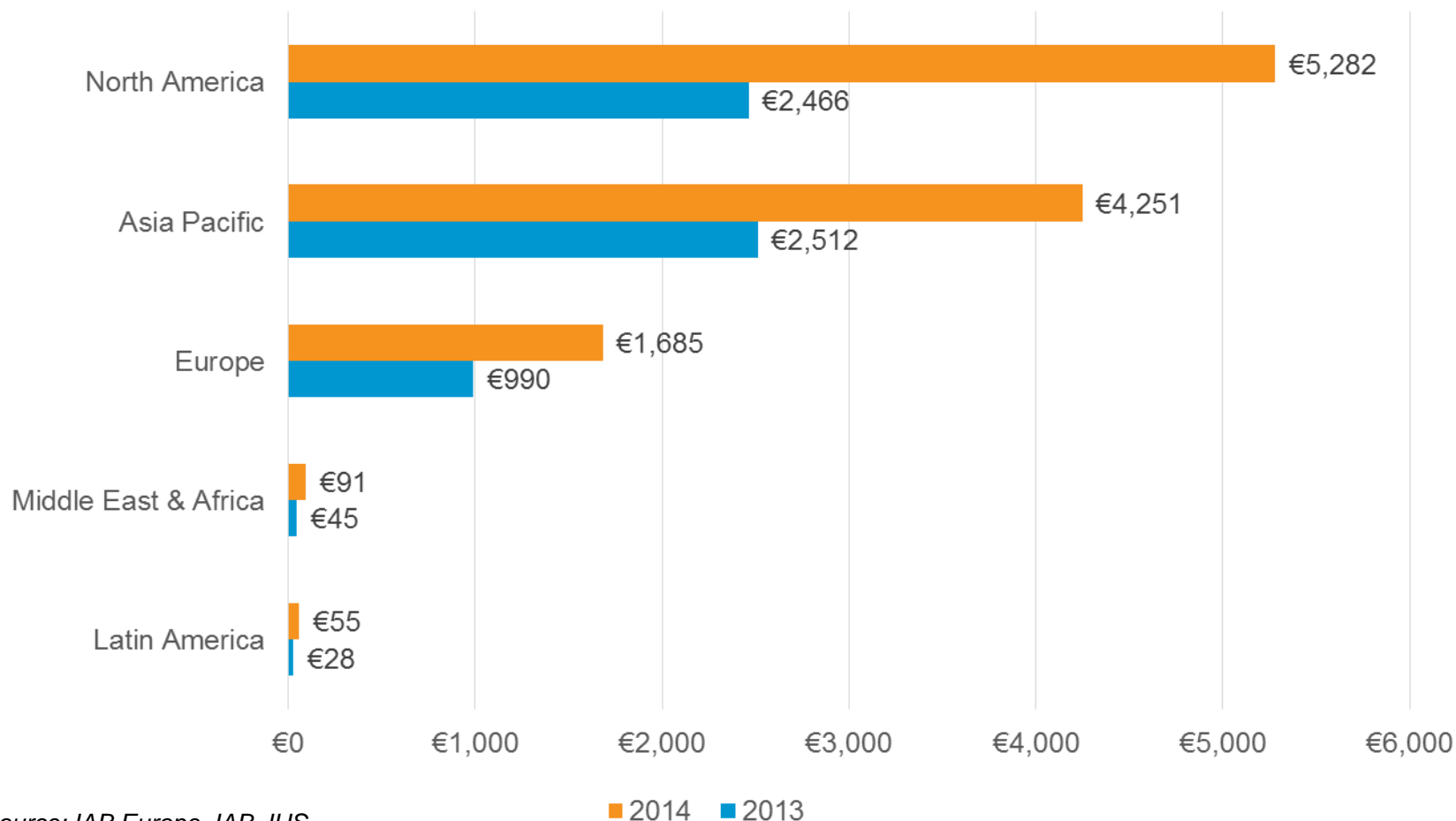
2014



Source: IAB Europe, IAB, IHS

# North America overtakes Asia-Pacific in mobile display advertising

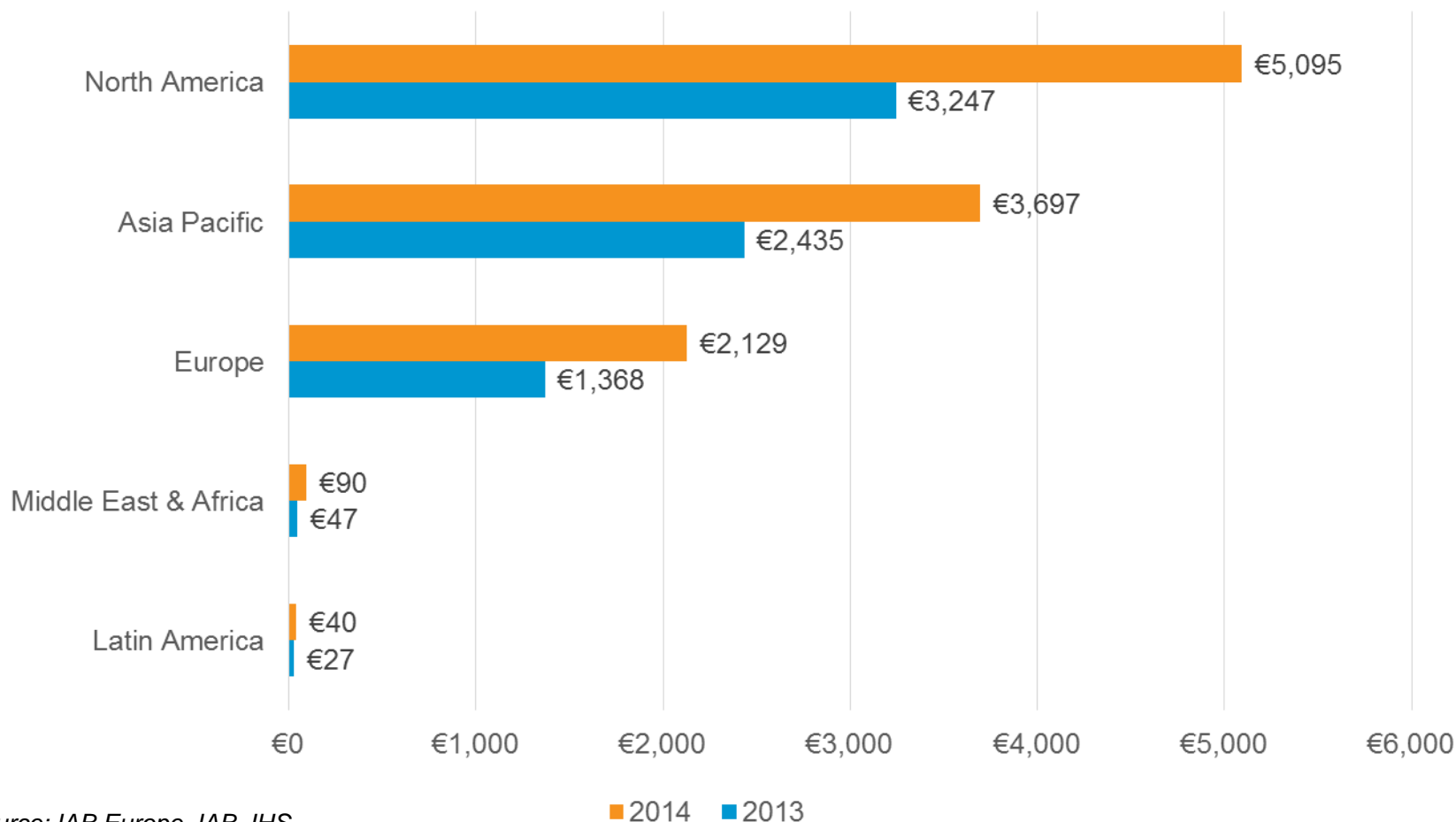
2013 vs 2014: Mobile display ad revenues by region (€m)



Source: IAB Europe, IAB, IHS

# Unchanged regional ranking in mobile search advertising

2013 vs 2014: Mobile search ad revenues by region (€m)

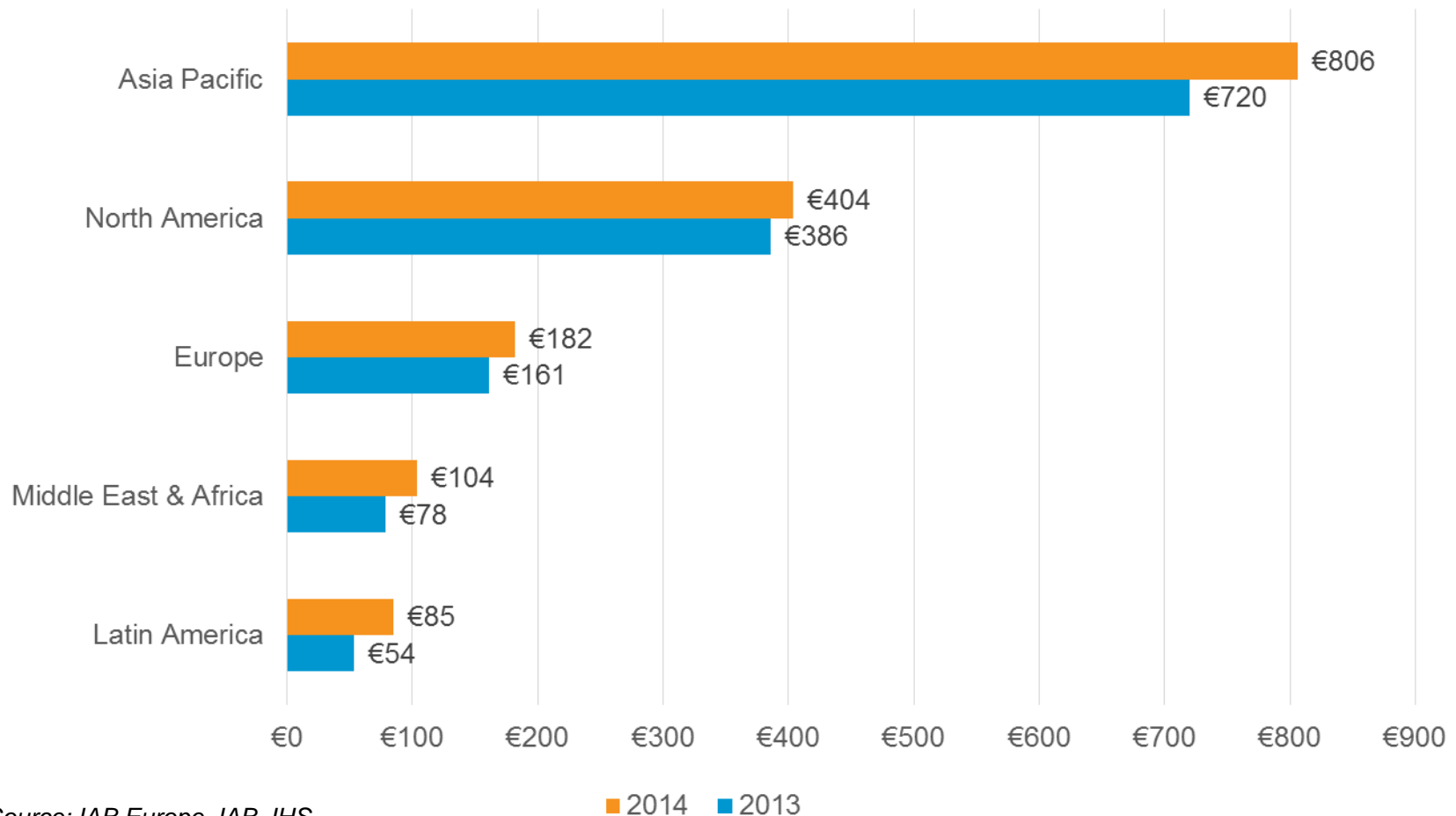


Source: IAB Europe, IAB, IHS



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

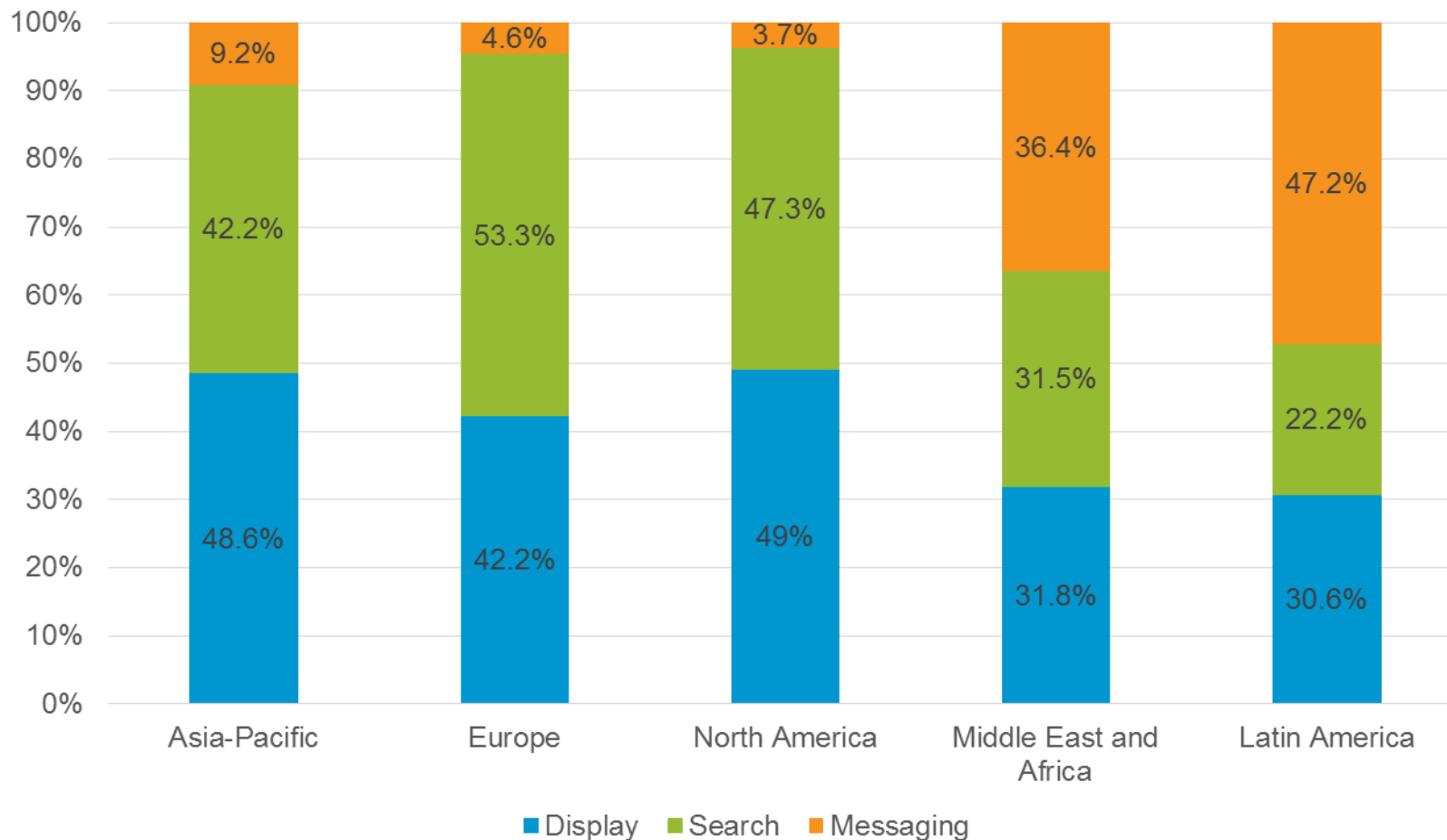
## Mobile messaging ad revenues 2013 vs 2014 (€m)



Source: IAB Europe, IAB, IHS

# Strong differences across format distribution globally

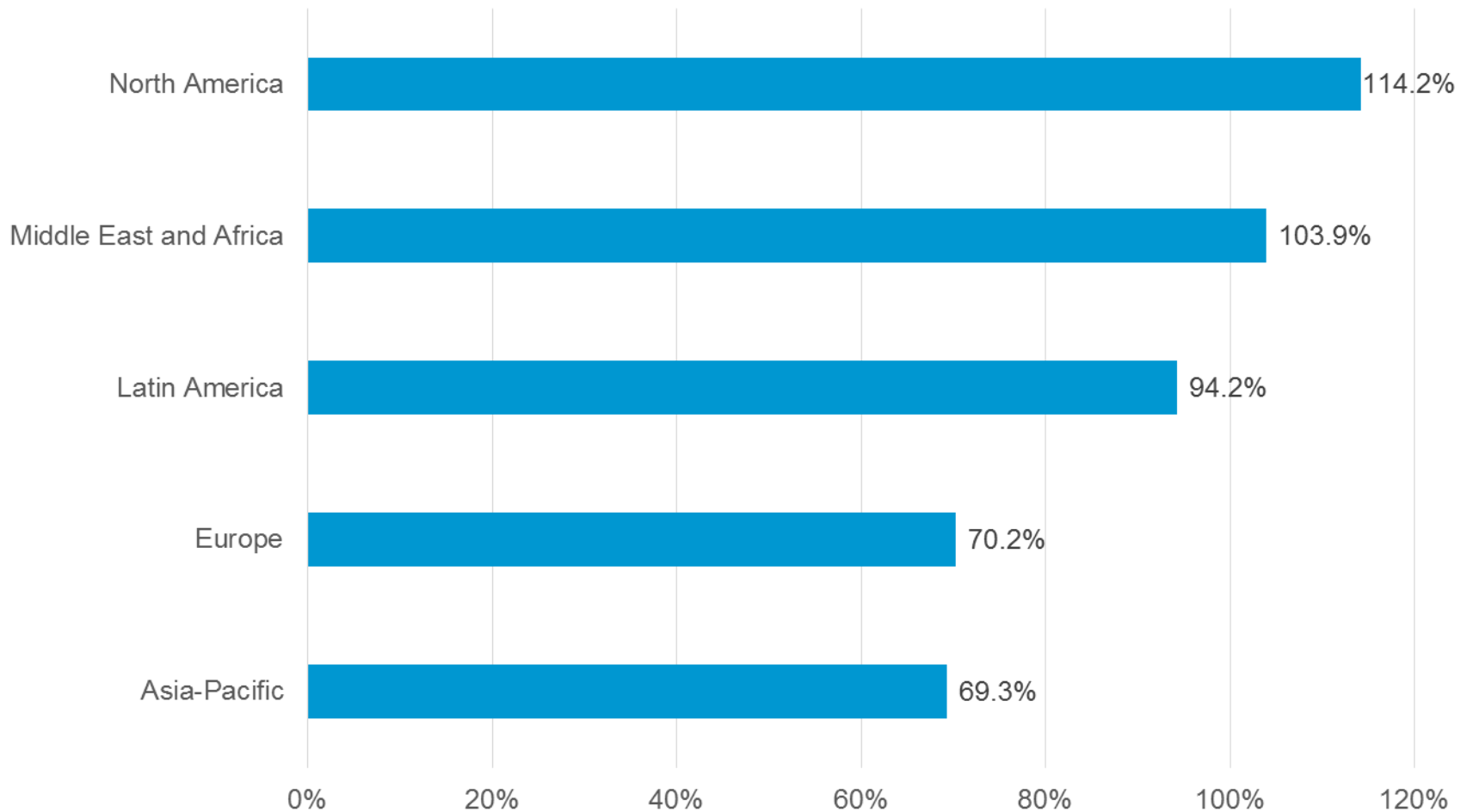
## Mobile ad revenue by format: regions



Source: IAB Europe, IAB, IHS

# North America mobile display market grows faster than other regions

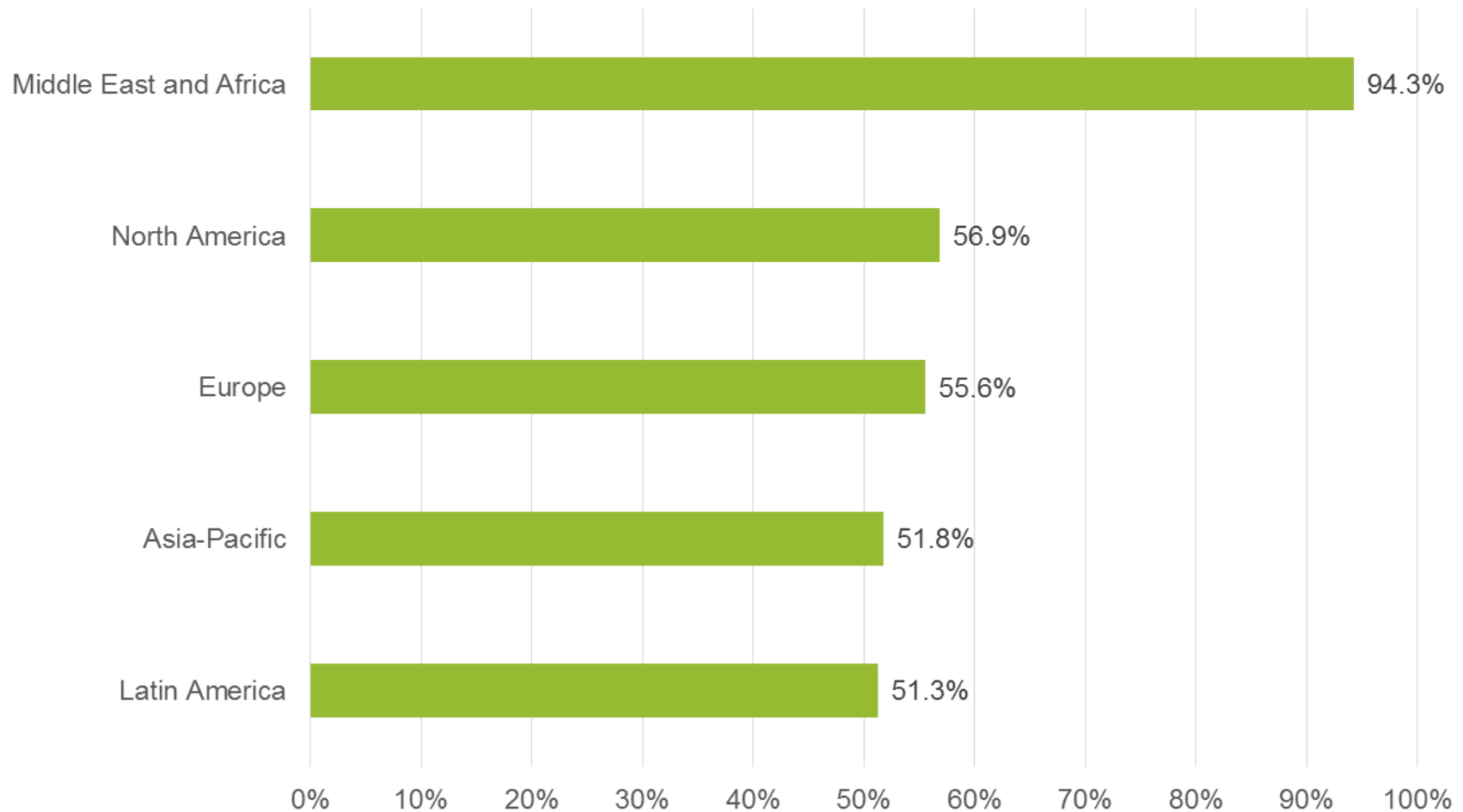
## Mobile display ad growth in 2014 by region



Source: IAB Europe, IAB, IHS

# Mobile search growth in Middle East & Africa decoupled from relatively homogenous growth in other regions

**Mobile search ad growth in 2014 by region**



Source: IAB Europe, IAB, IHS

# Definition of Mobile Advertising Formats

**Display:** Any display advertising viewed or read on a mobile phone including rich media and video advertising. This could be browser-based as well as in-app.

**Search:** Advertising appearing on specific word requests on search engines, viewed on a mobile device.

**SMS/MMS:** 3rd party ads in SMS and outbound SMS only - this includes advertising either within the body copy of an SMS / MMS message, or outbound messaging.

# Market Sizing Methodology

Market size is gross, defined as after discounts, before agency commissions. Global market sizing and format split is based on reported data by local IABs, and a statistical and econometric model. Reported data has been harmonised to adjust for discounts and agency commissions. Modelled data is based on variables such as smartphone penetration, 3G subscriptions, messaging volume. The model has been refined based on benchmarking variables such as ad spend per capita, mobile subscriptions and 3G/4G penetration as well as through interviews with key players across the mobile advertising ecosystem. Model also takes into account typology of mobile ad markets in terms of maturity and format proliferation.

All data expressed in constant 2013 USD. Conversions into EUR based on 2013 USD-EUR foreign exchange rates.

Constant currency is used to eliminate exchange rate effects on growth rates.

# Thanks

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