

BRUSSELS, LONDON & NEW YORK 13 AUGUST 2015

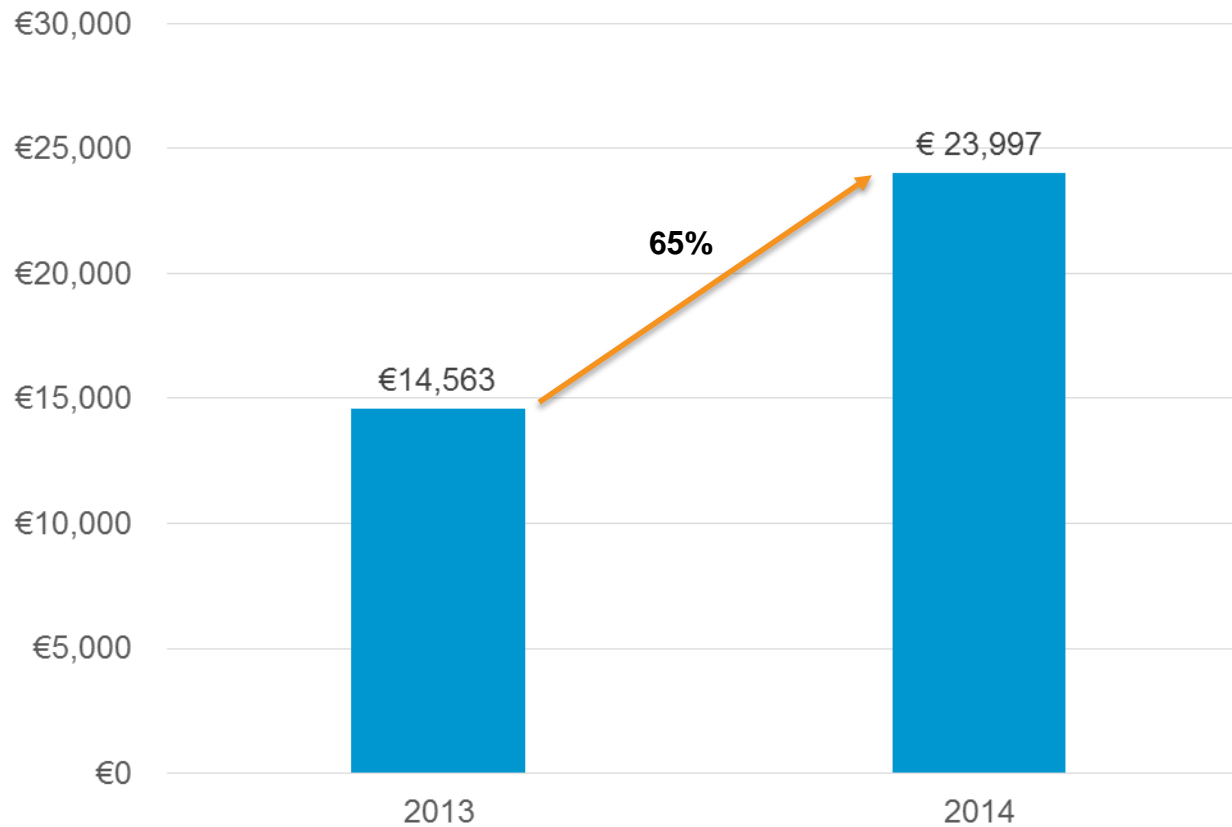
Global Mobile Advertising Revenue 2014

The State of Mobile Advertising Around the World

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

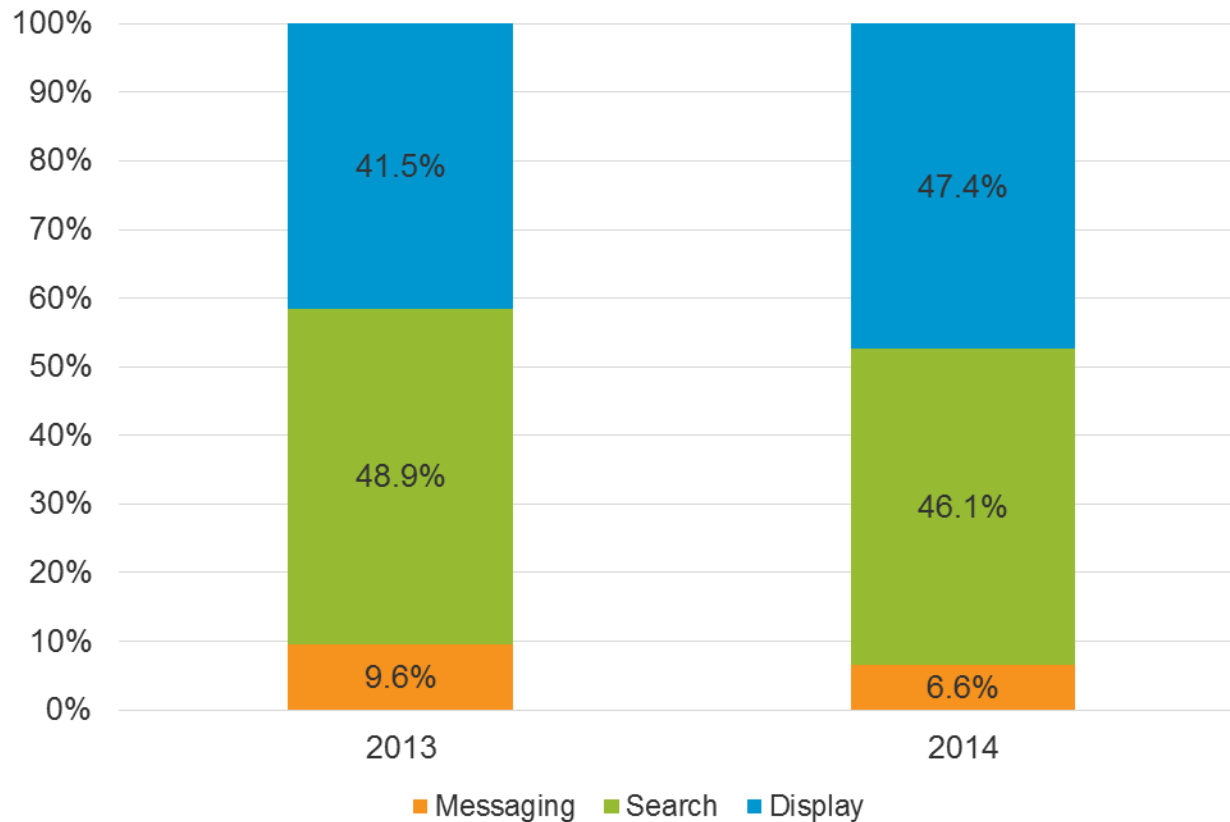
Global mobile ad revenue (€m)*



**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

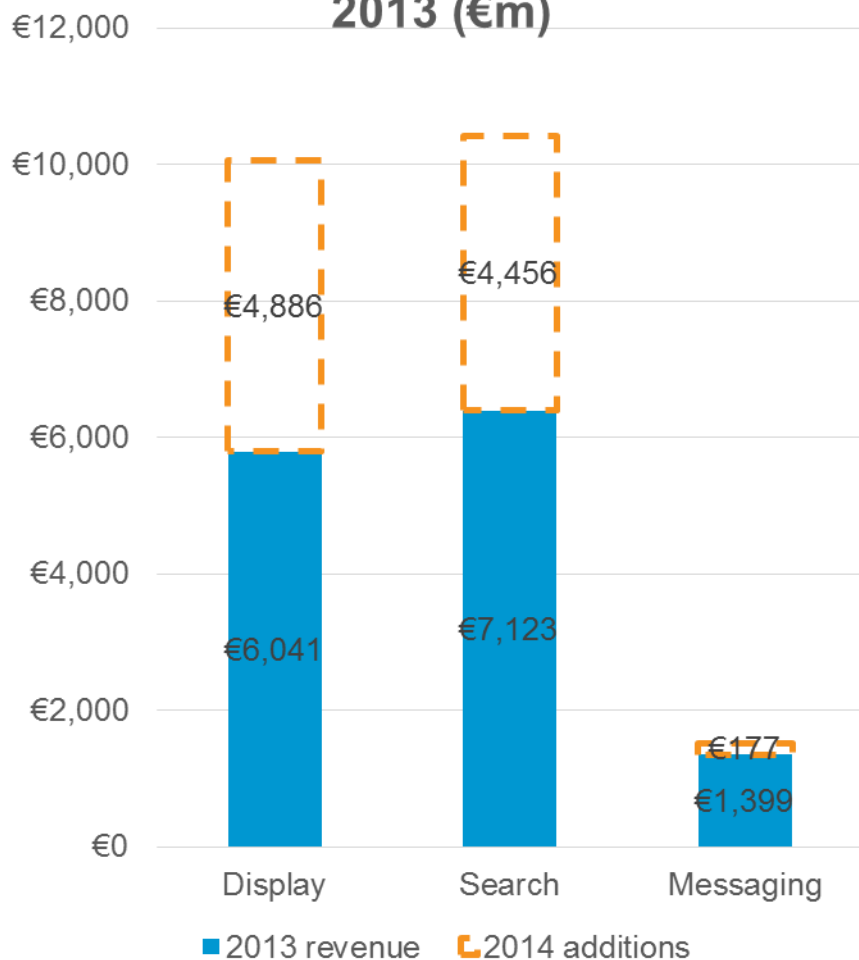
Display expands its share of mobile advertising further as messaging faces further pressure



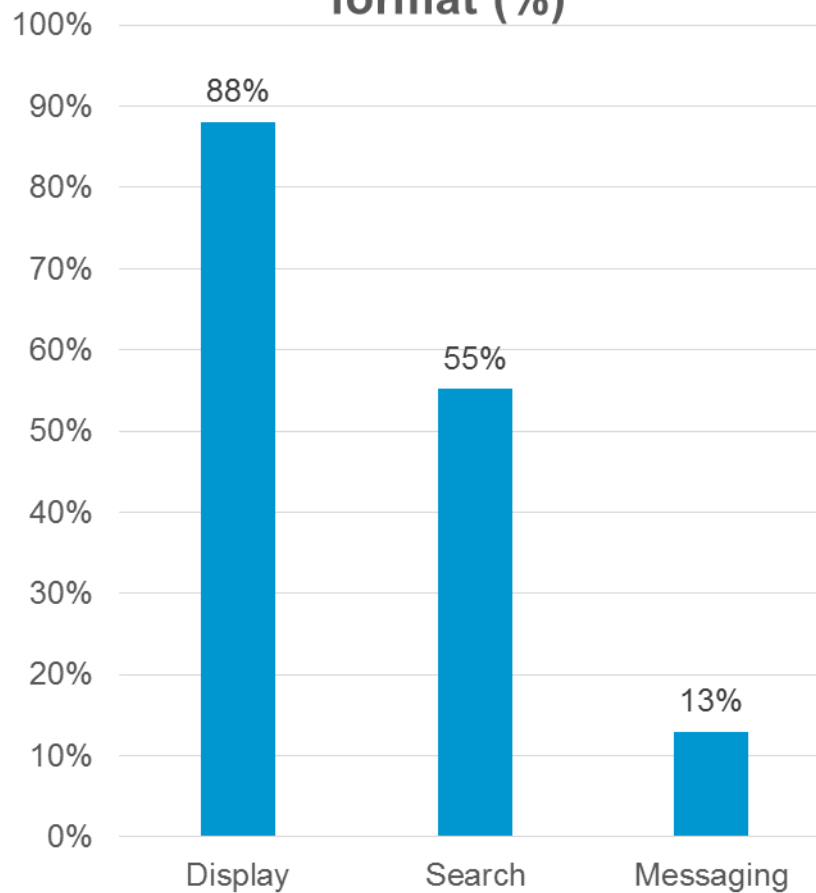
Source: IAB Europe, IAB, IHS

Mobile display advertising revenue growth outperforms other formats

2014 revenue gains over 2013 (€m)



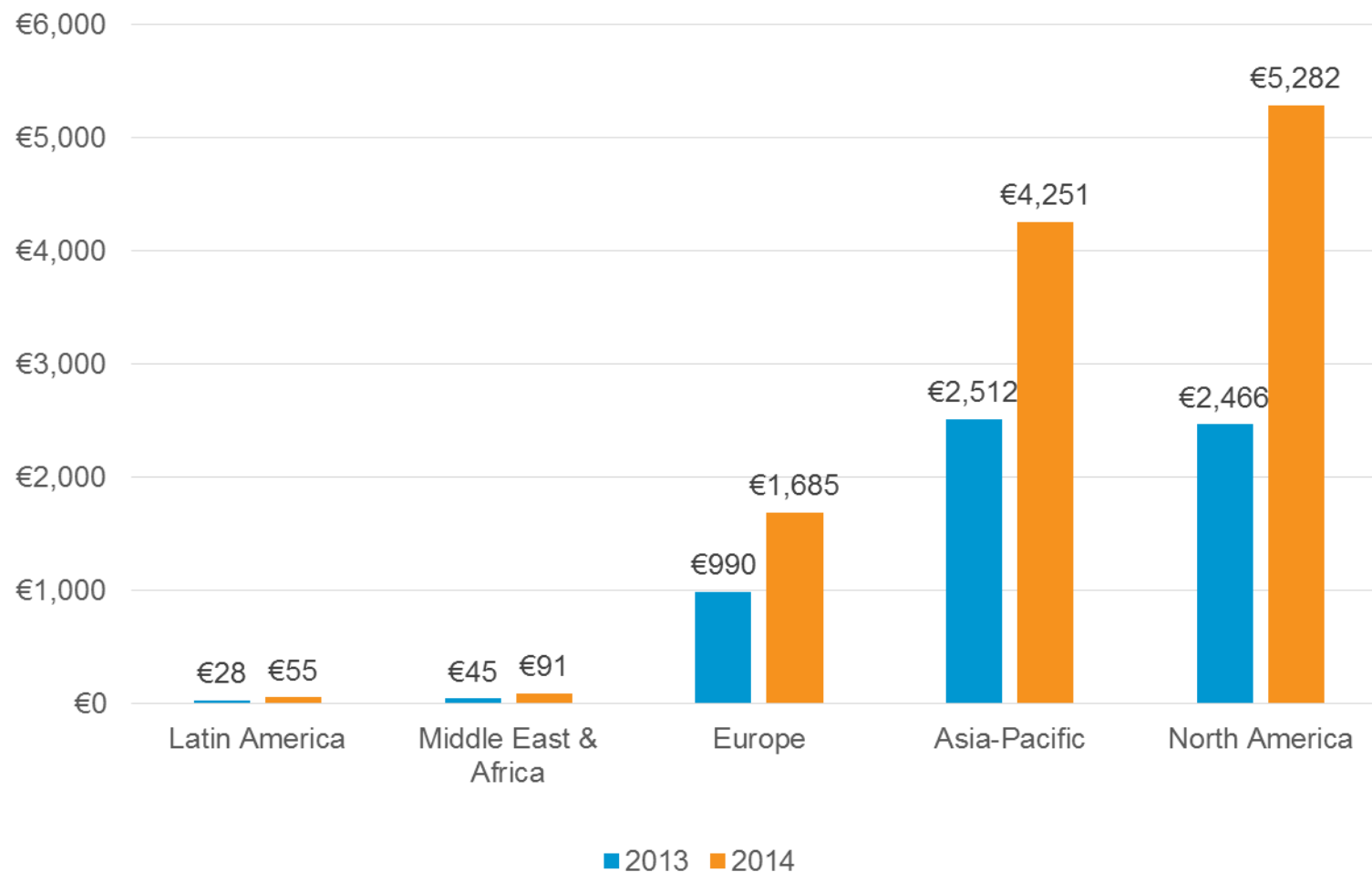
Mobile ad growth in 2014 by format (%)



Source: IAB Europe, IAB, IHS

North America remains the largest mobile advertising market

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



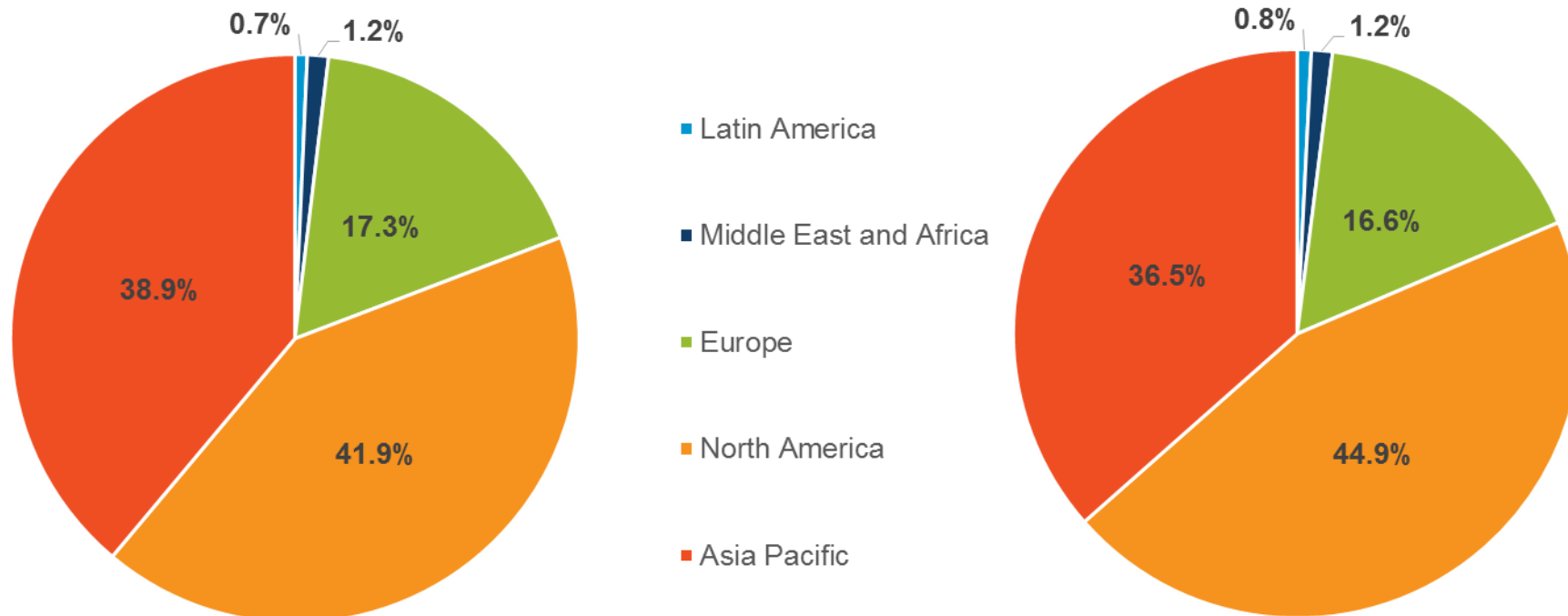
Source: IAB Europe, IAB, IHS

Minor changes in share of global mobile advertising revenue

Global mobile advertising revenue: share by region

2013

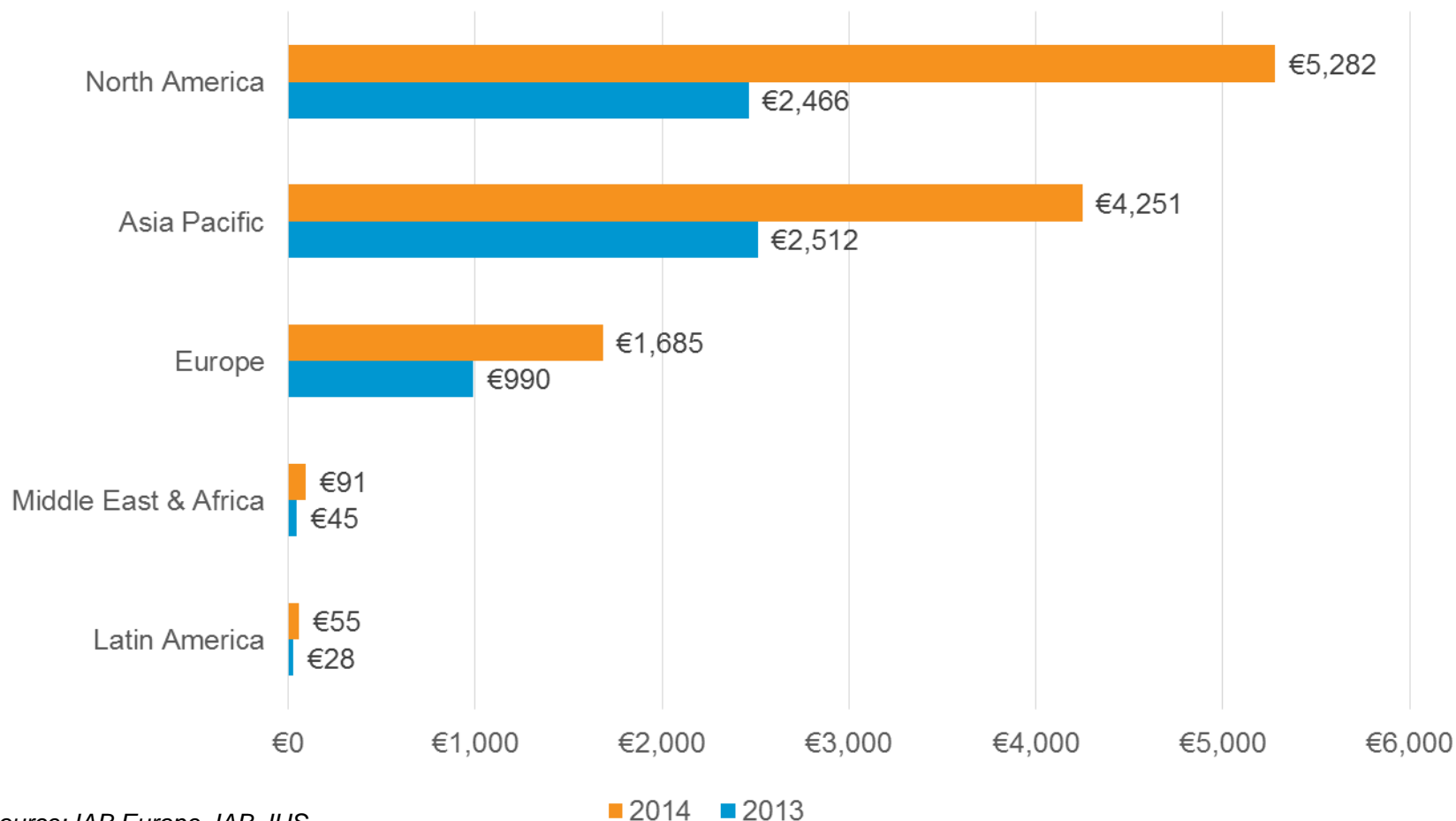
2014



Source: IAB Europe, IAB, IHS

North America overtakes Asia-Pacific in mobile display advertising

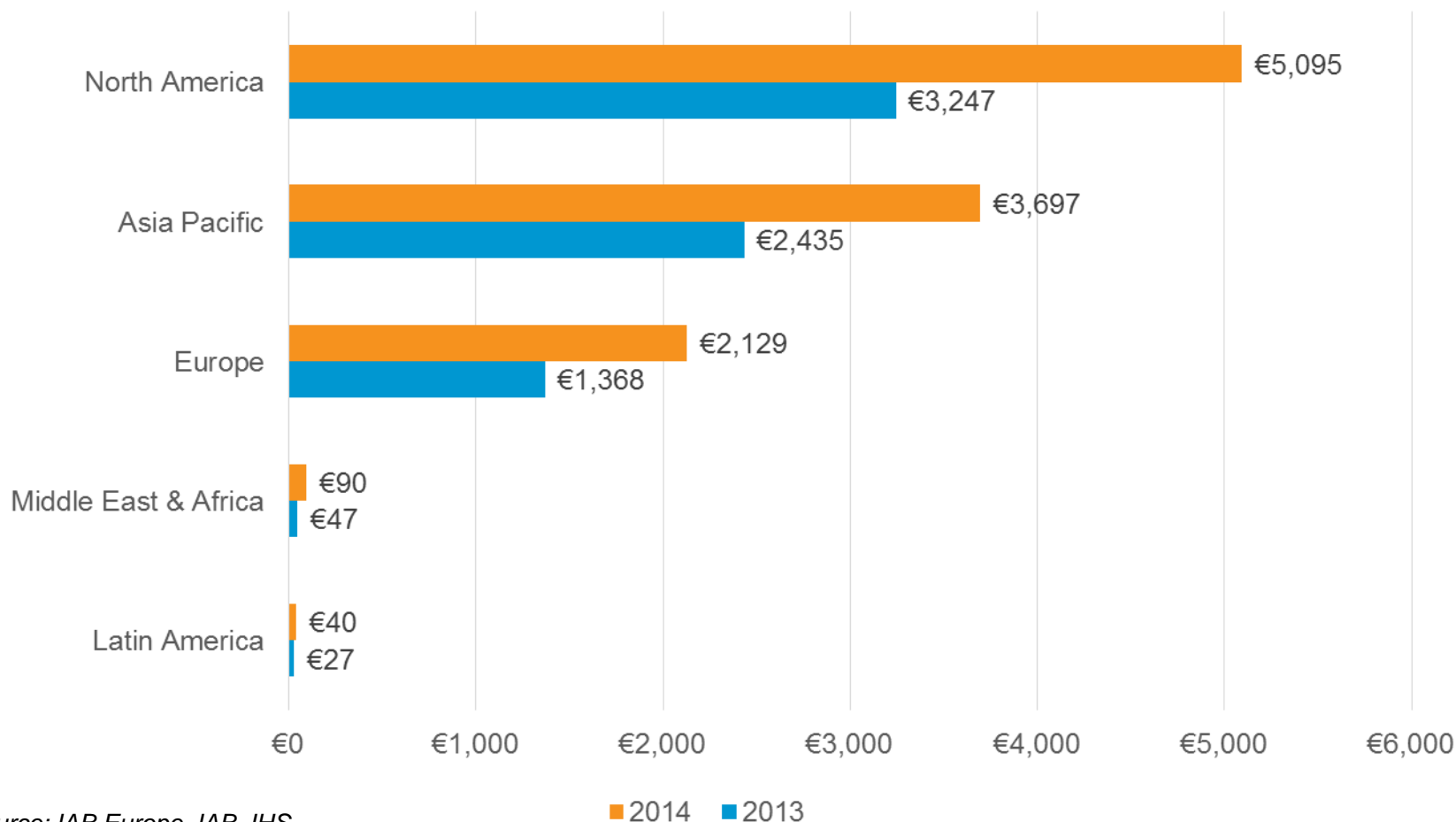
2013 vs 2014: Mobile display ad revenues by region (€m)



Source: IAB Europe, IAB, IHS

Unchanged regional ranking in mobile search advertising

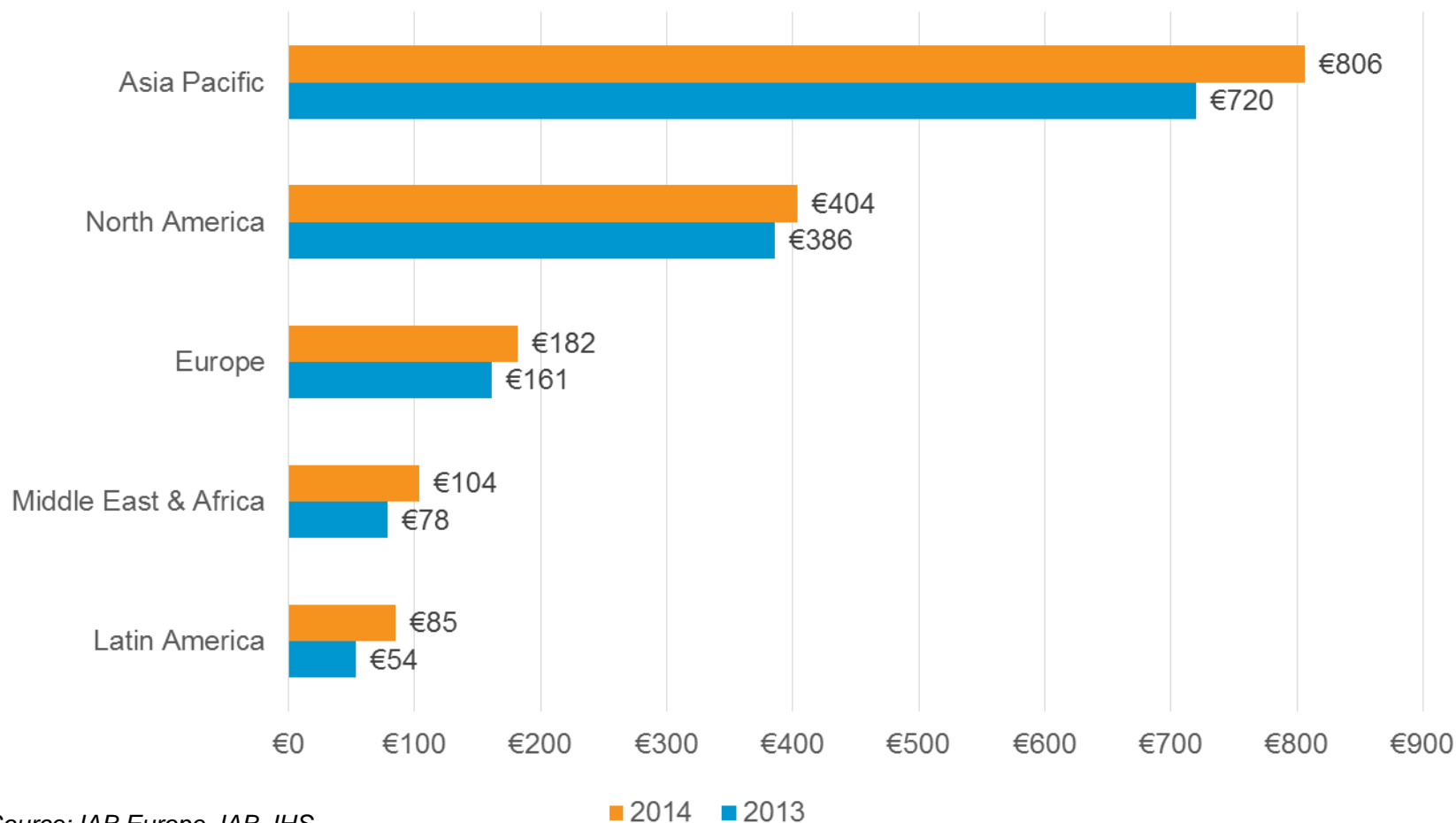
2013 vs 2014: Mobile search ad revenues by region (€m)



Source: IAB Europe, IAB, IHS

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

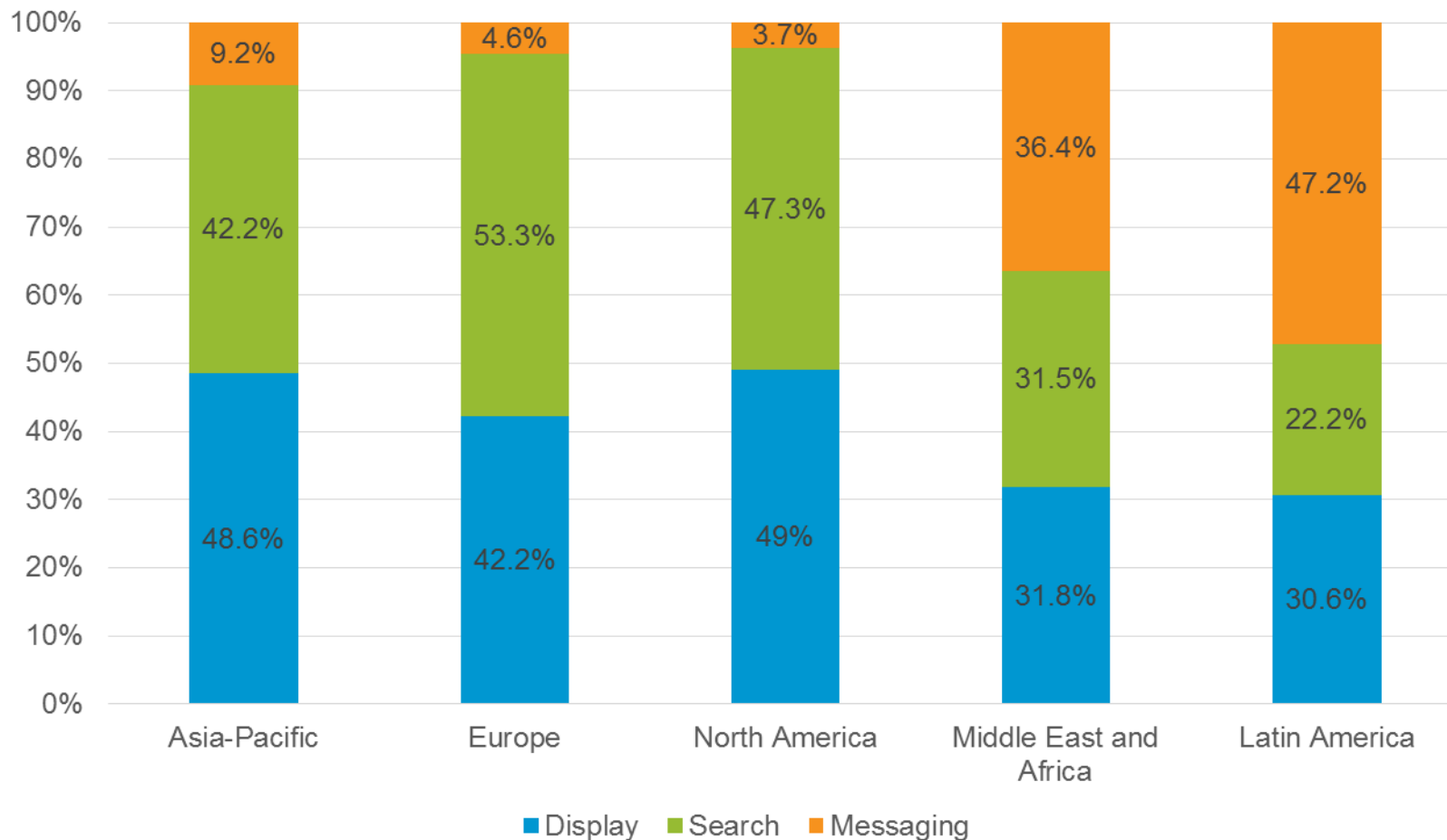
Mobile messaging ad revenues 2013 vs 2014 (€m)



Source: IAB Europe, IAB, IHS

Strong differences across format distribution globally

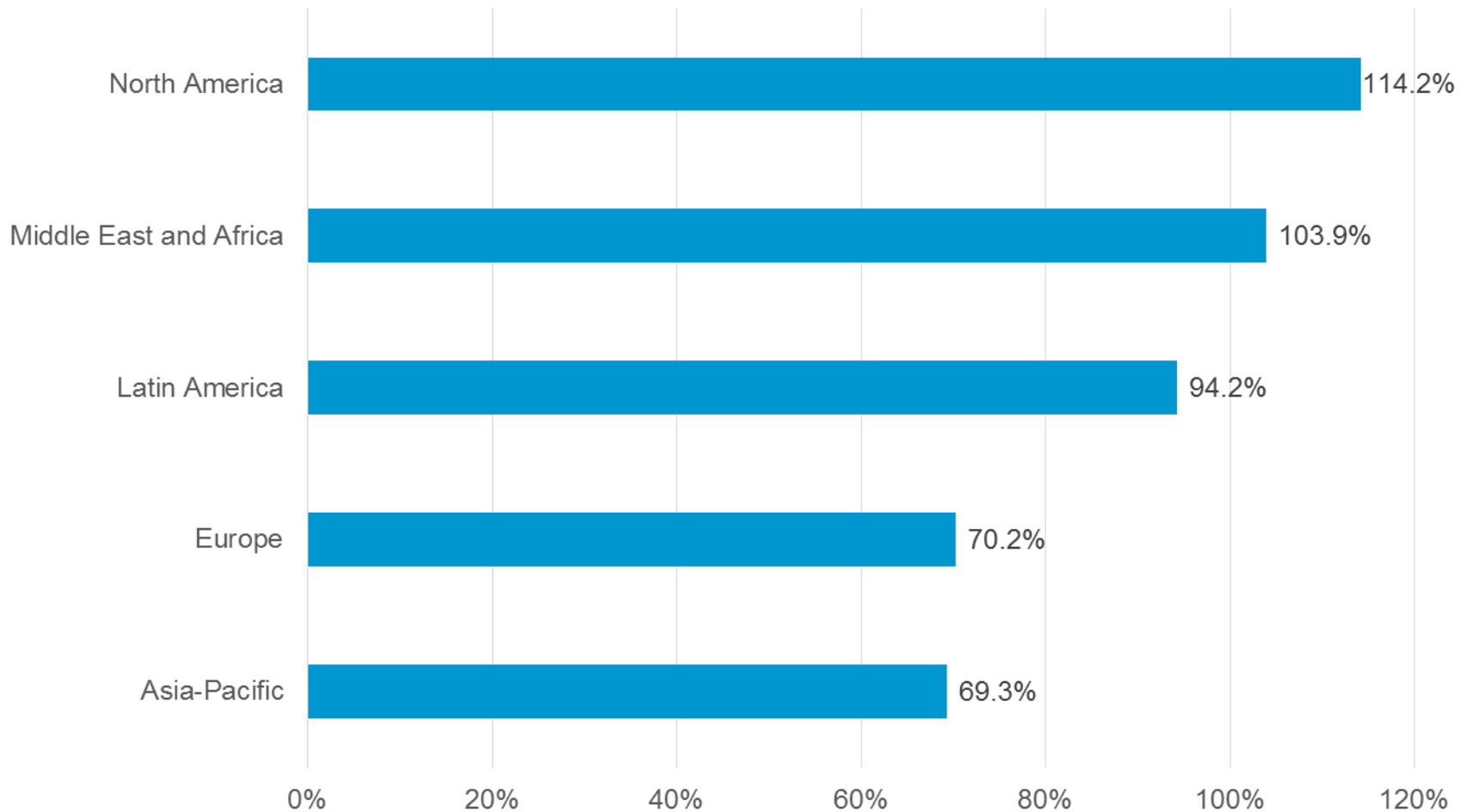
Mobile ad revenue by format: regions



Source: IAB Europe, IAB, IHS

North America mobile display market grows faster than other regions

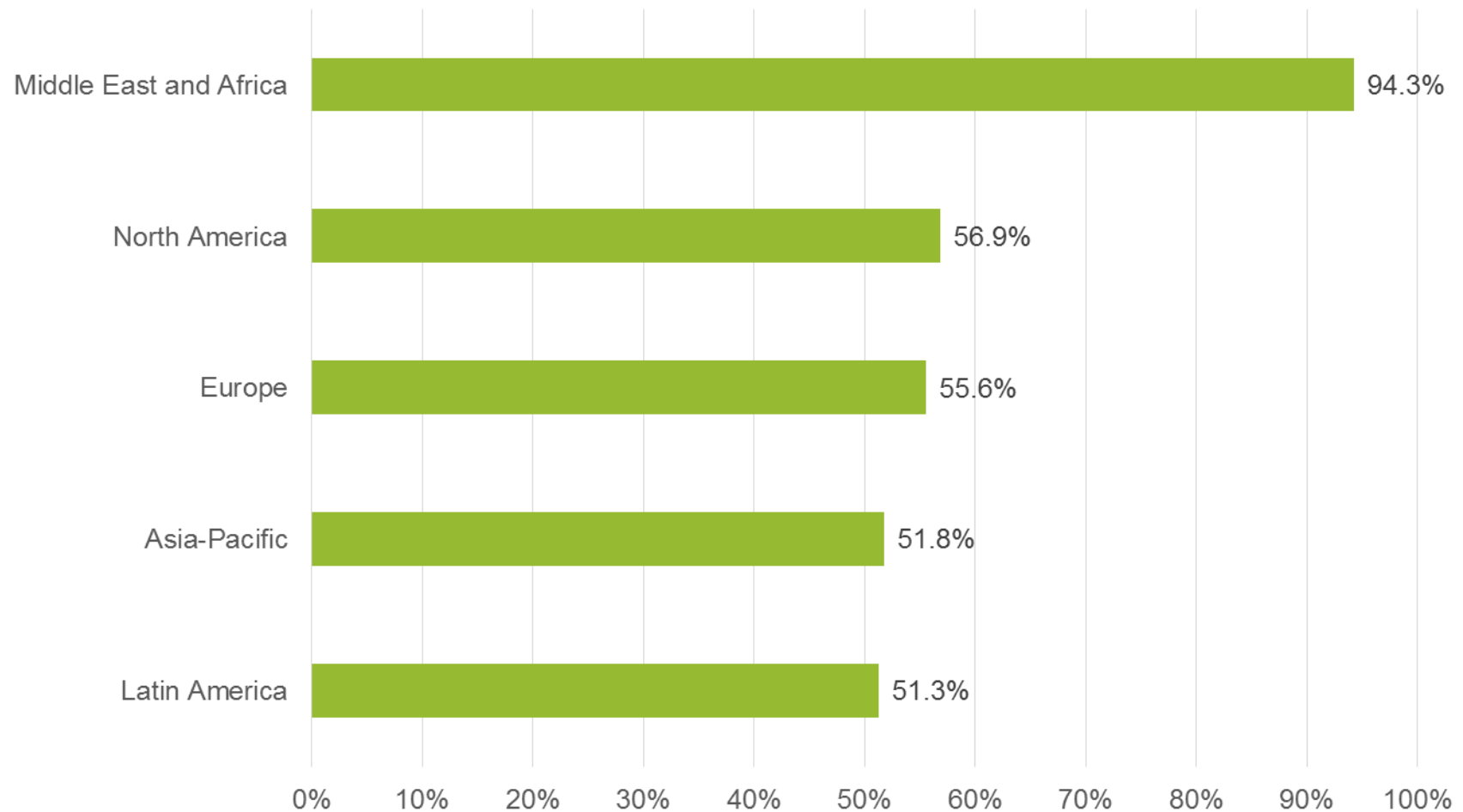
Mobile display ad growth in 2014 by region



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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