

# Global Mobile Advertising Revenue 2013

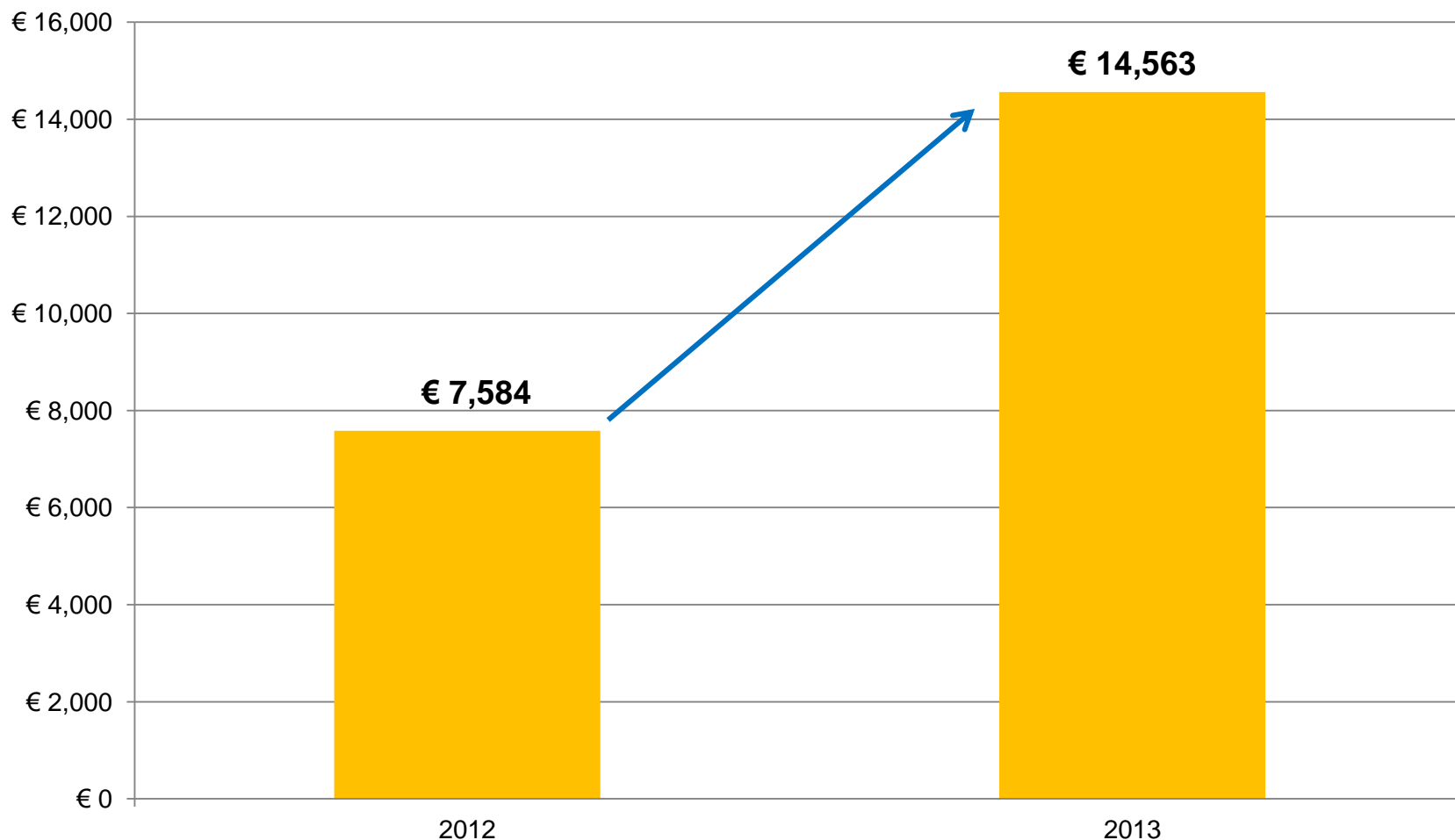
## The State of Mobile Advertising Around the World

August 2014



# Global mobile advertising revenue nearly doubled in 2013

## Global mobile ad revenue (€m)\*

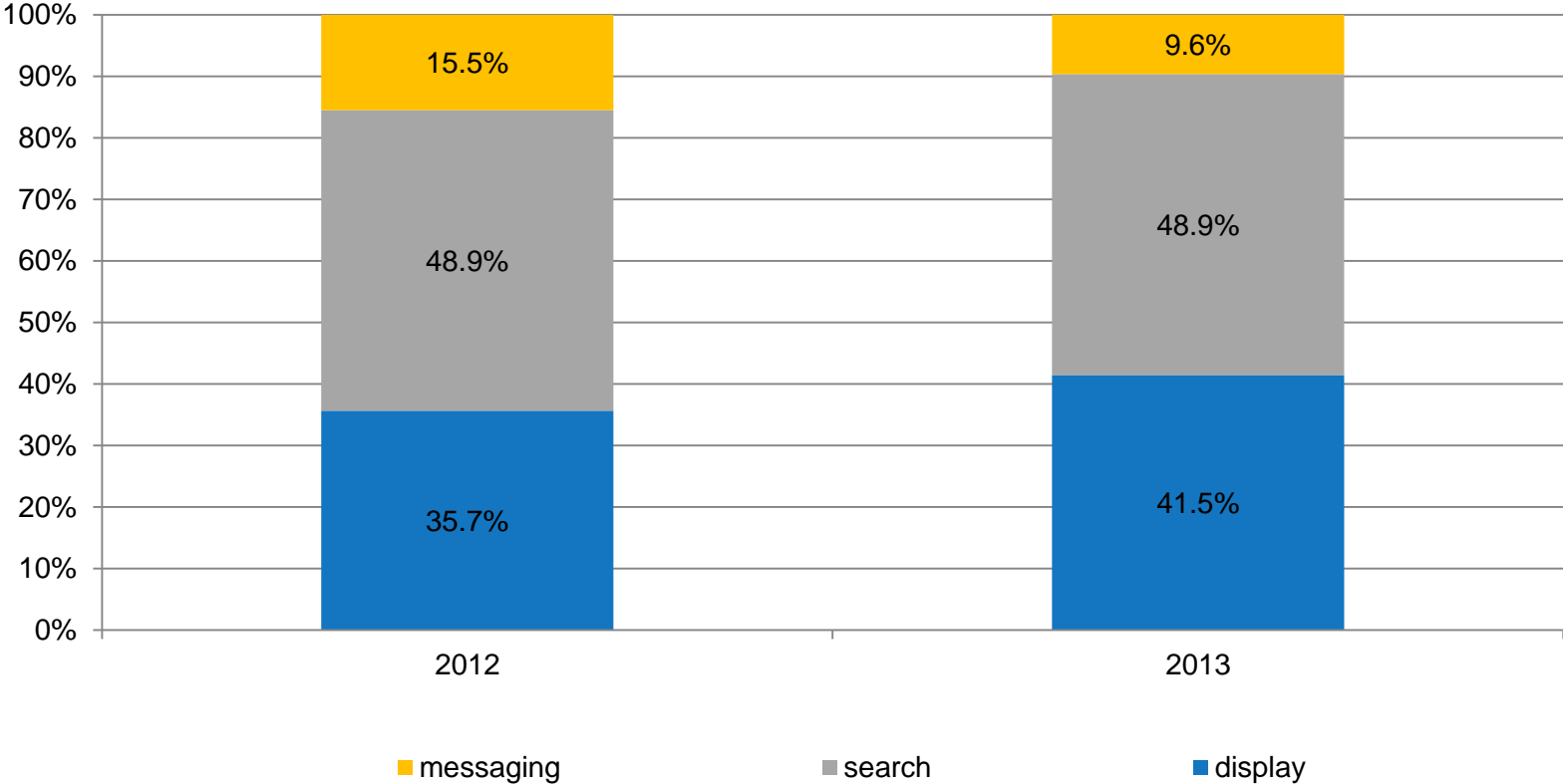


*\*All data in this presentation is in constant 2013 EUR. Constant exchange rates have been used in order to eliminate currency effects on the growth rate.*

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

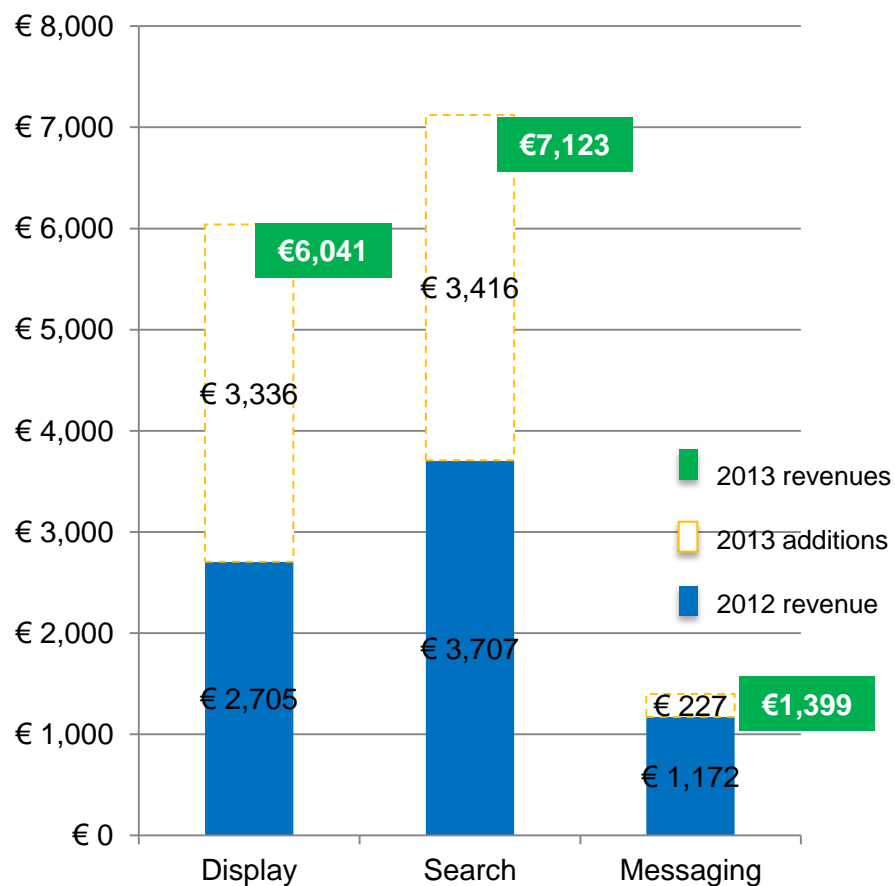


### Global mobile ad revenue by format

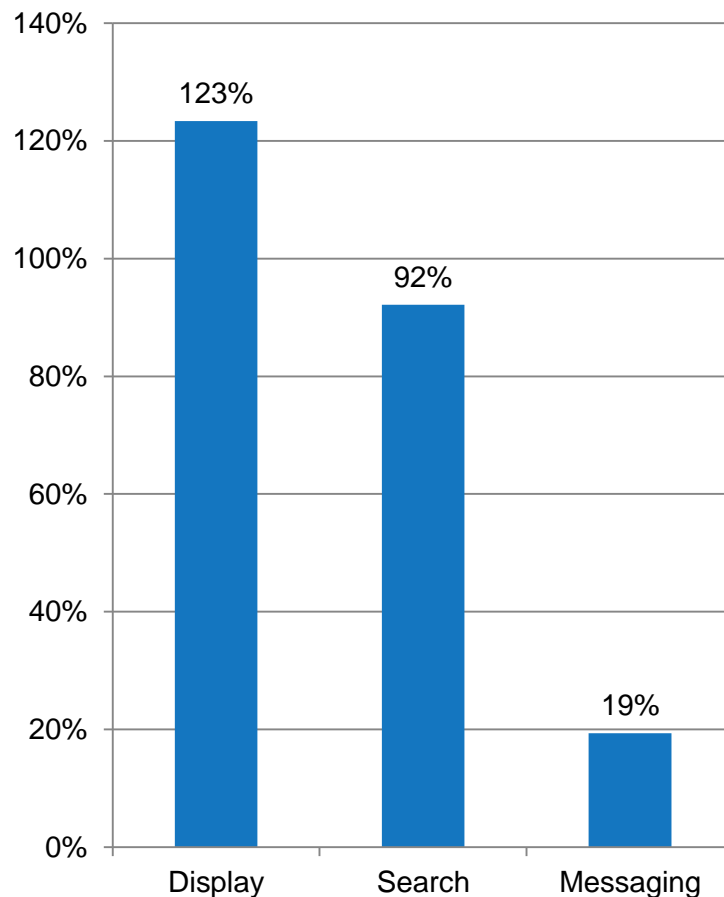


# Mobile display advertising revenues more than doubles as growth outperformed other formats

## 2013 revenue gains over 2012 (€m)



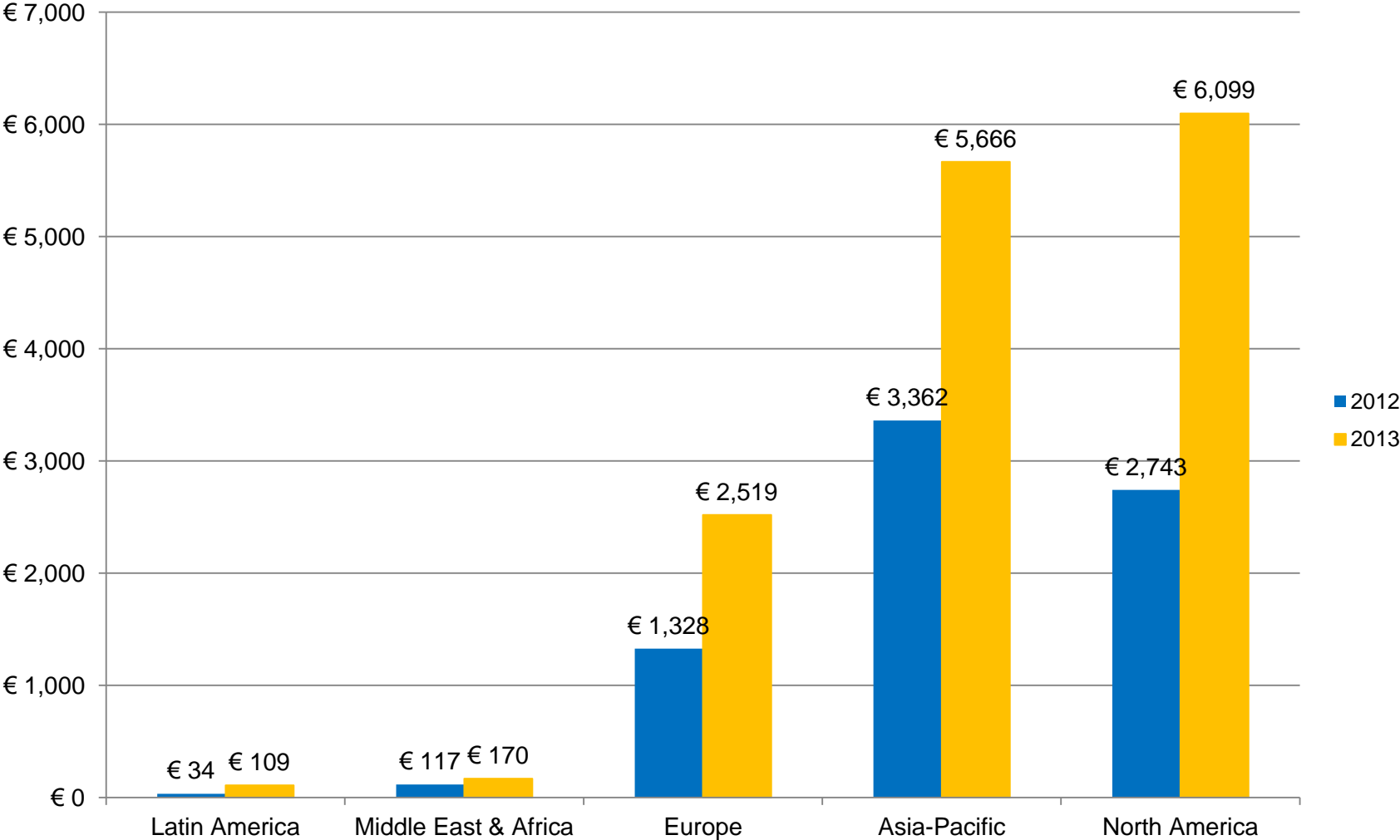
## Mobile ad growth in 2013 by format (%)



# North America overtakes Asia-Pacific as largest mobile advertising market



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

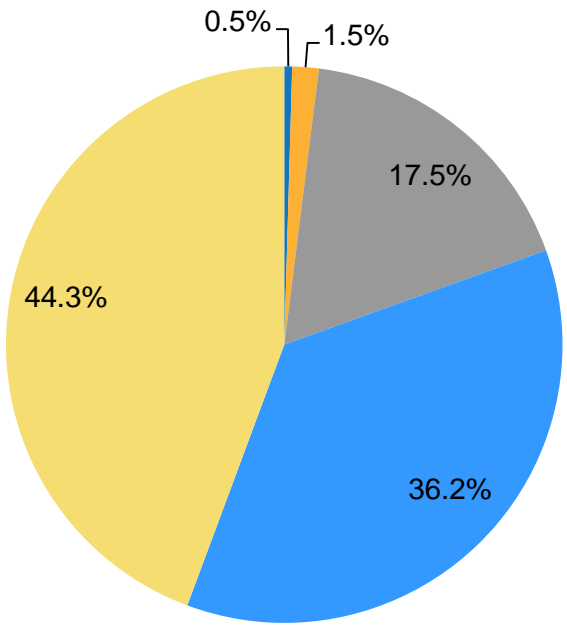


# Share gains for all regions apart from Asia-Pacific and Middle East & Africa

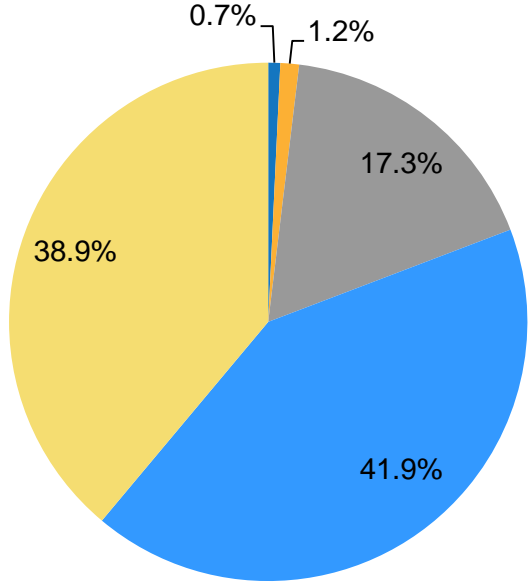


## Global mobile advertising revenue: share by region

2012



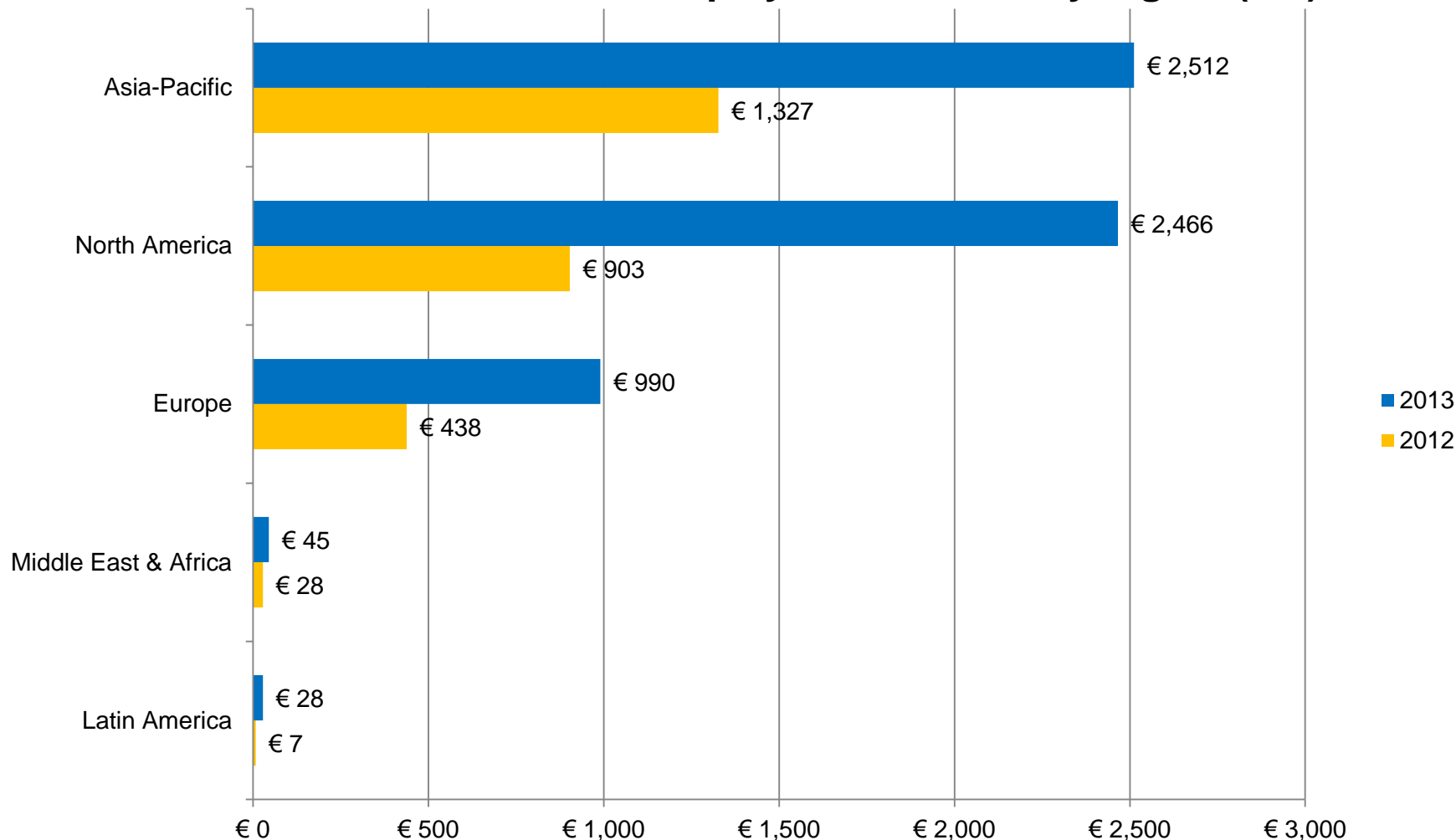
2013



- Latin America
- Middle-East and Africa
- Europe
- North America
- Asia-Pacific

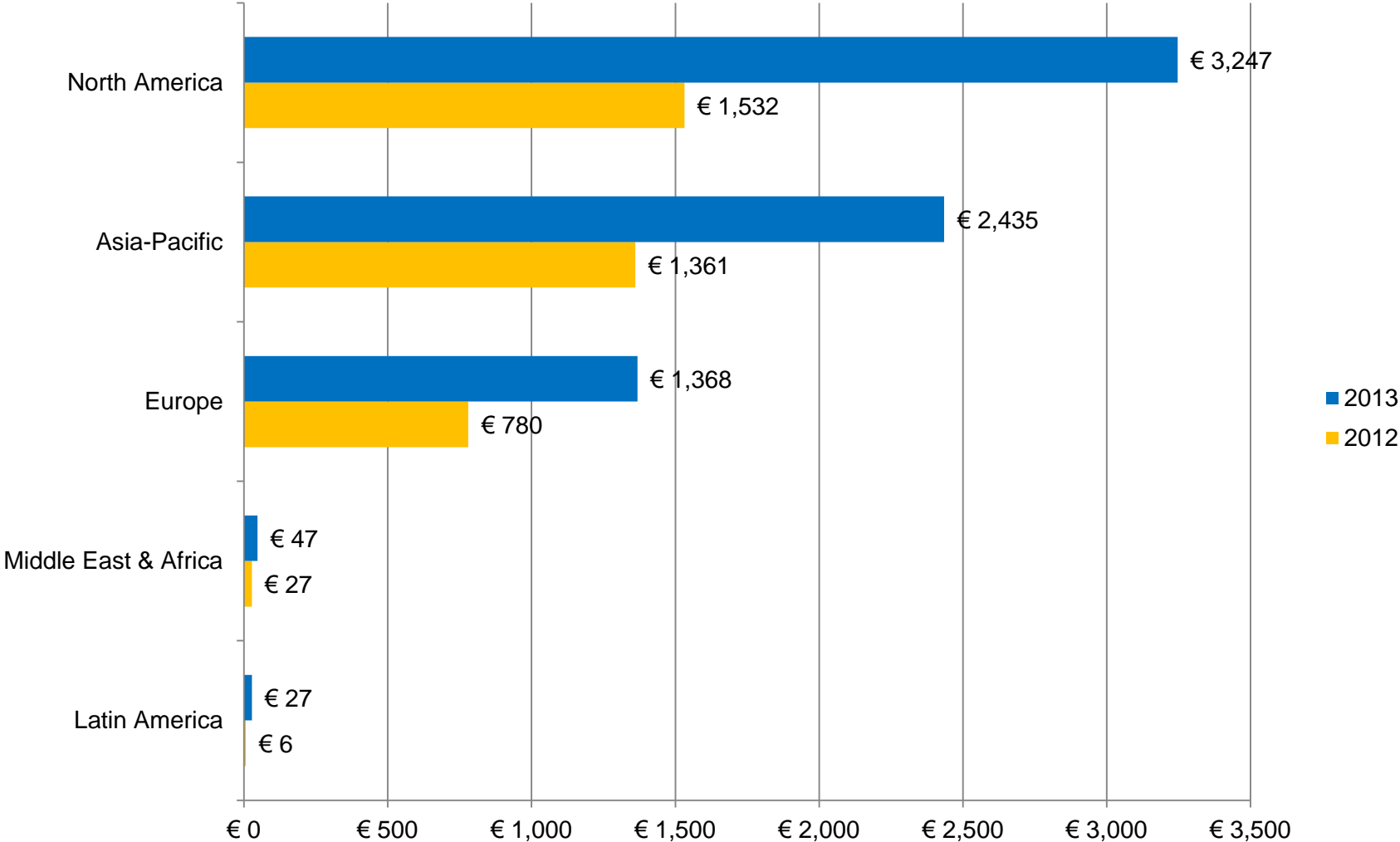
# Asia-Pacific maintains marginal lead in mobile display advertising ahead of rapidly growing North American market

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



# Unchanged regional ranking in mobile search advertising

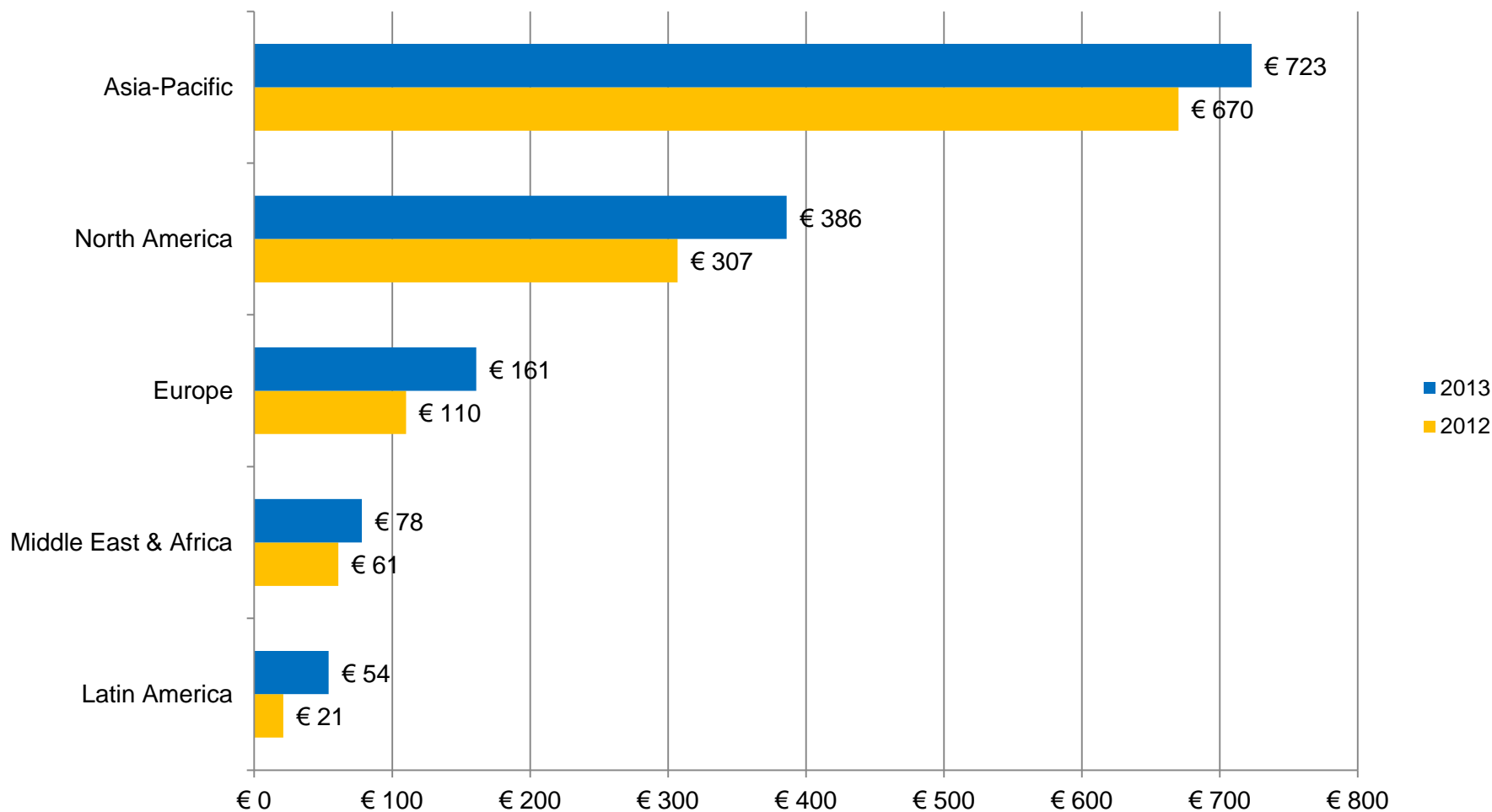
### 2012 vs 2013: Mobile search ad revenues by region (€m)





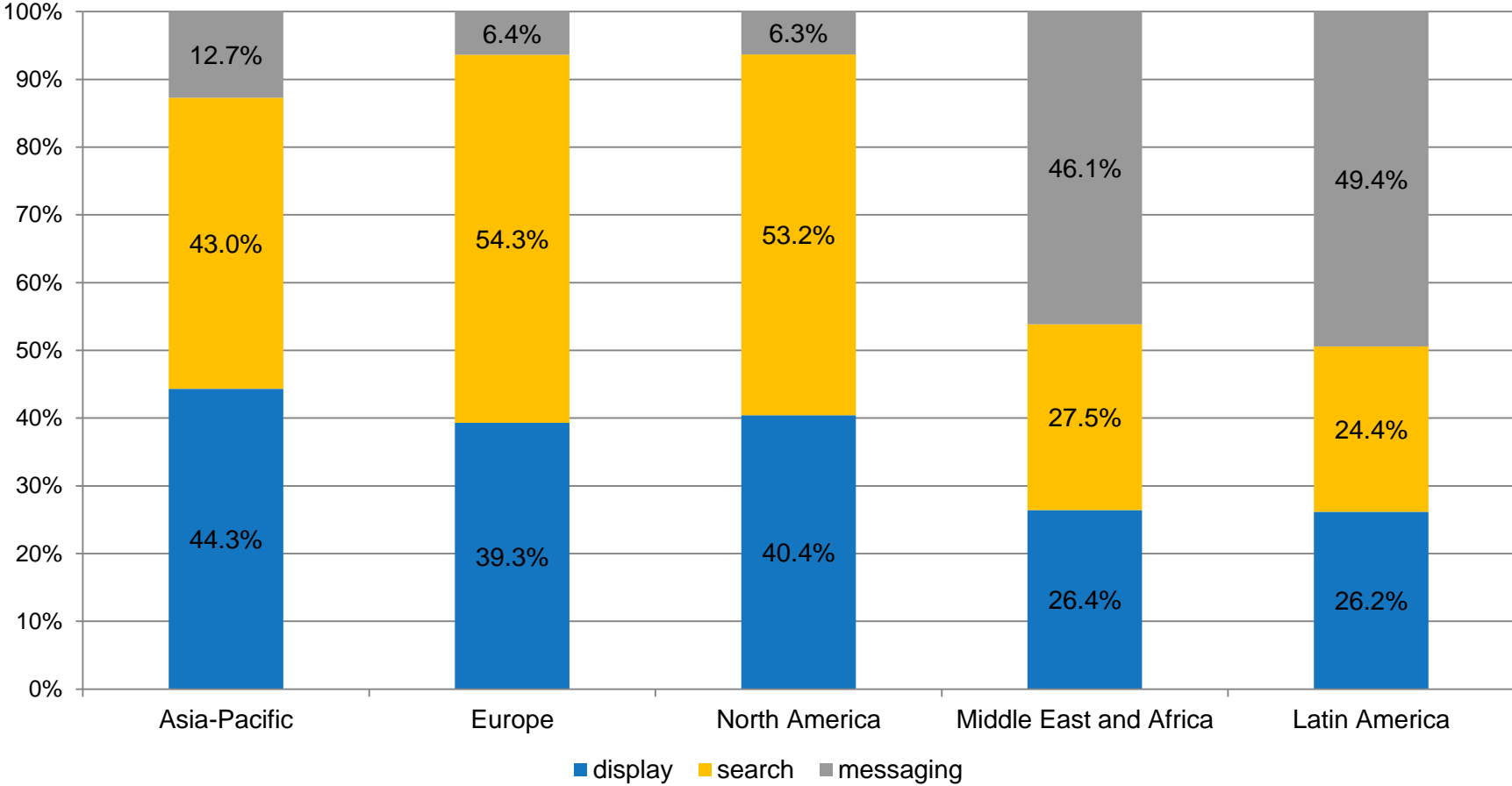
# Gap between smaller and larger mobile advertising regions is less pronounced in messaging

## Mobile messaging ad revenues 2012 vs 2013 (€m)



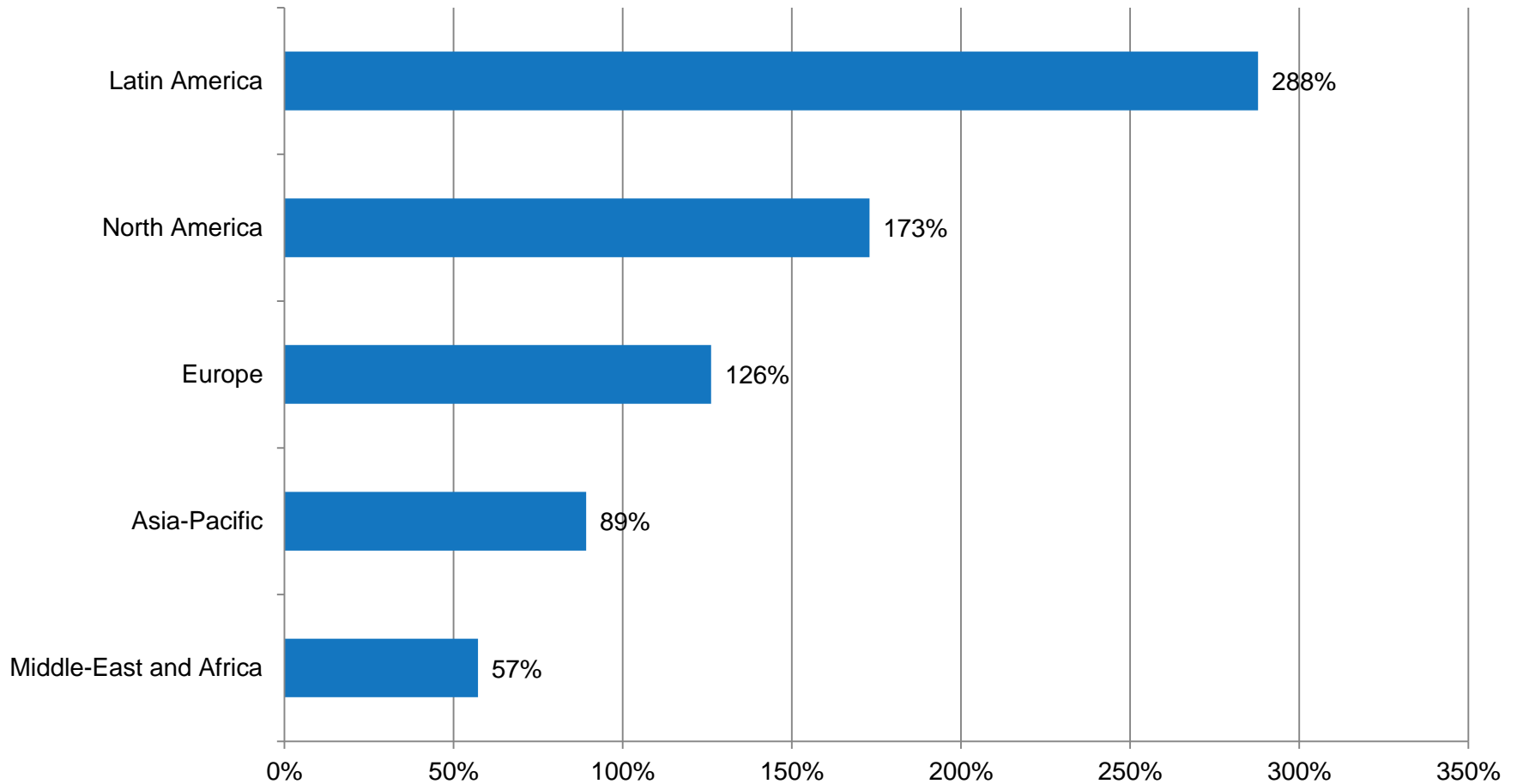
# Strong differences across format distribution globally

### Mobile ad revenue by format: regions



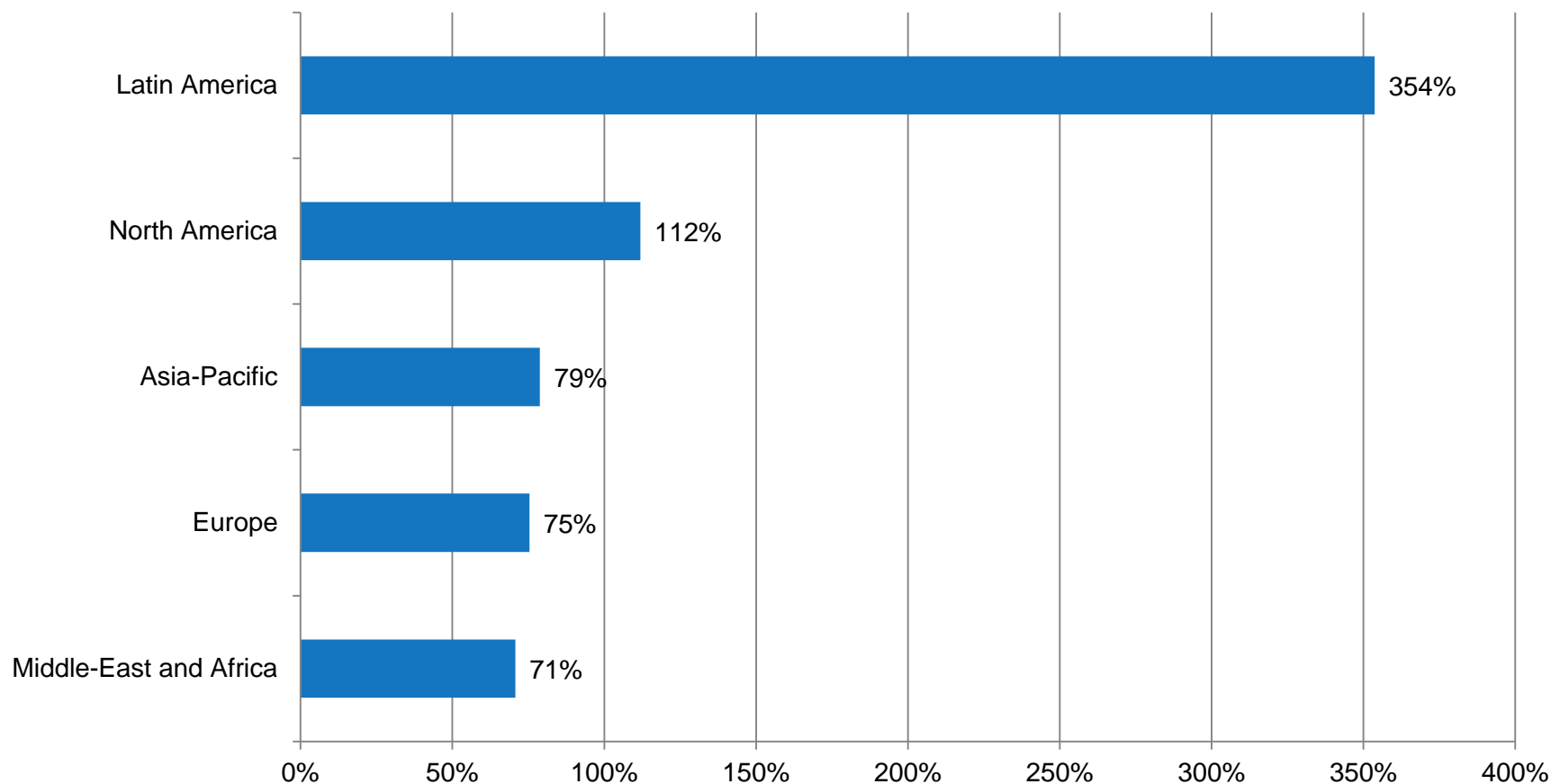
# Latin American mobile display market grows 5x faster than market in Middle East and Africa

## Mobile display ad growth in 2013 by region



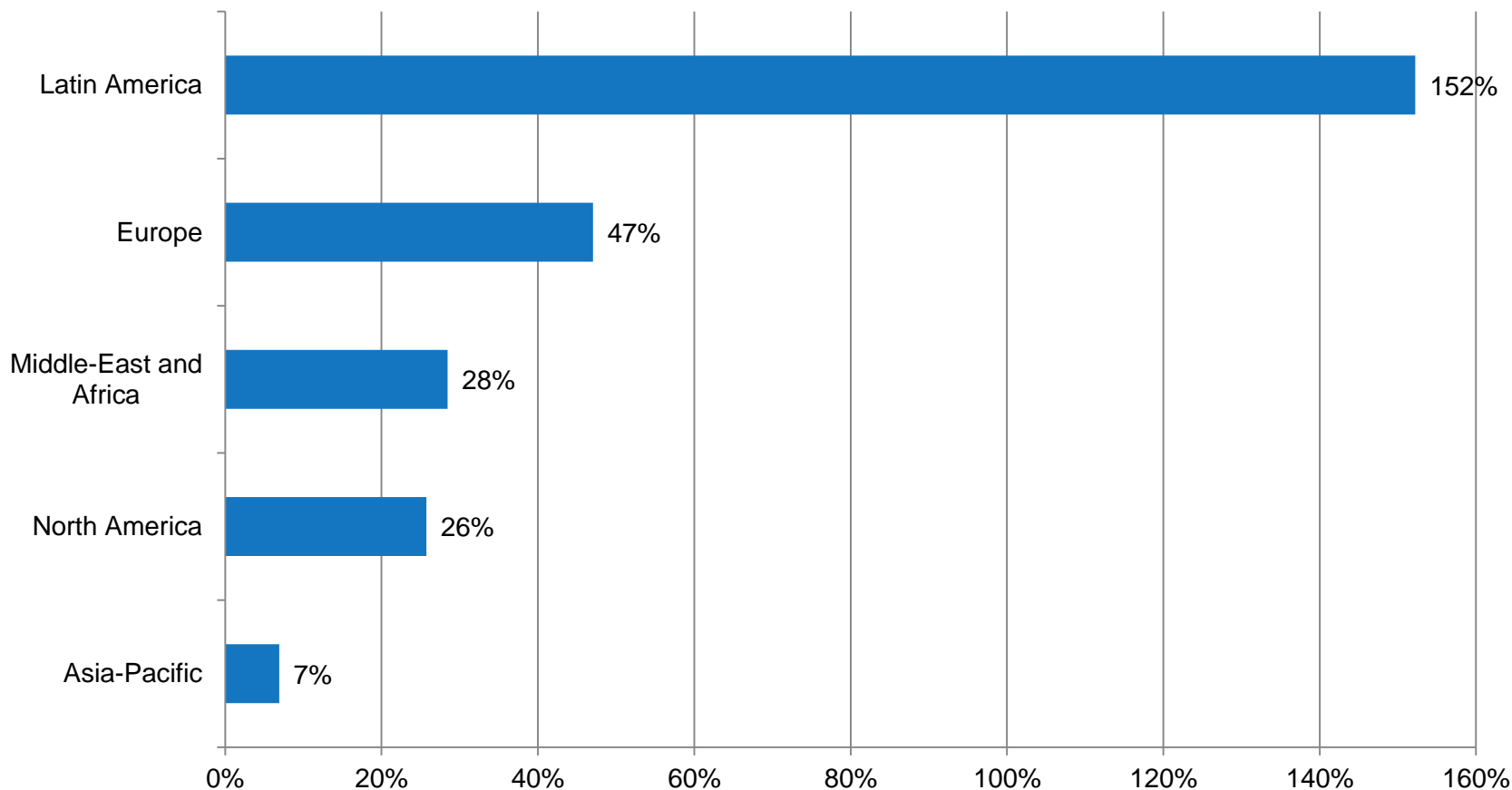
# Mobile search growth in Latin America decoupled from relatively homogenous growth in other regions

## 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



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