

adex



GLOBAL MOBILE ADVERTISING SPEND

A co-operation between IAB Mobile Marketing
Center of Excellence in the U.S., IAB Europe and IHS
Screen Digest

2011 1ST EDITION

iab●europe

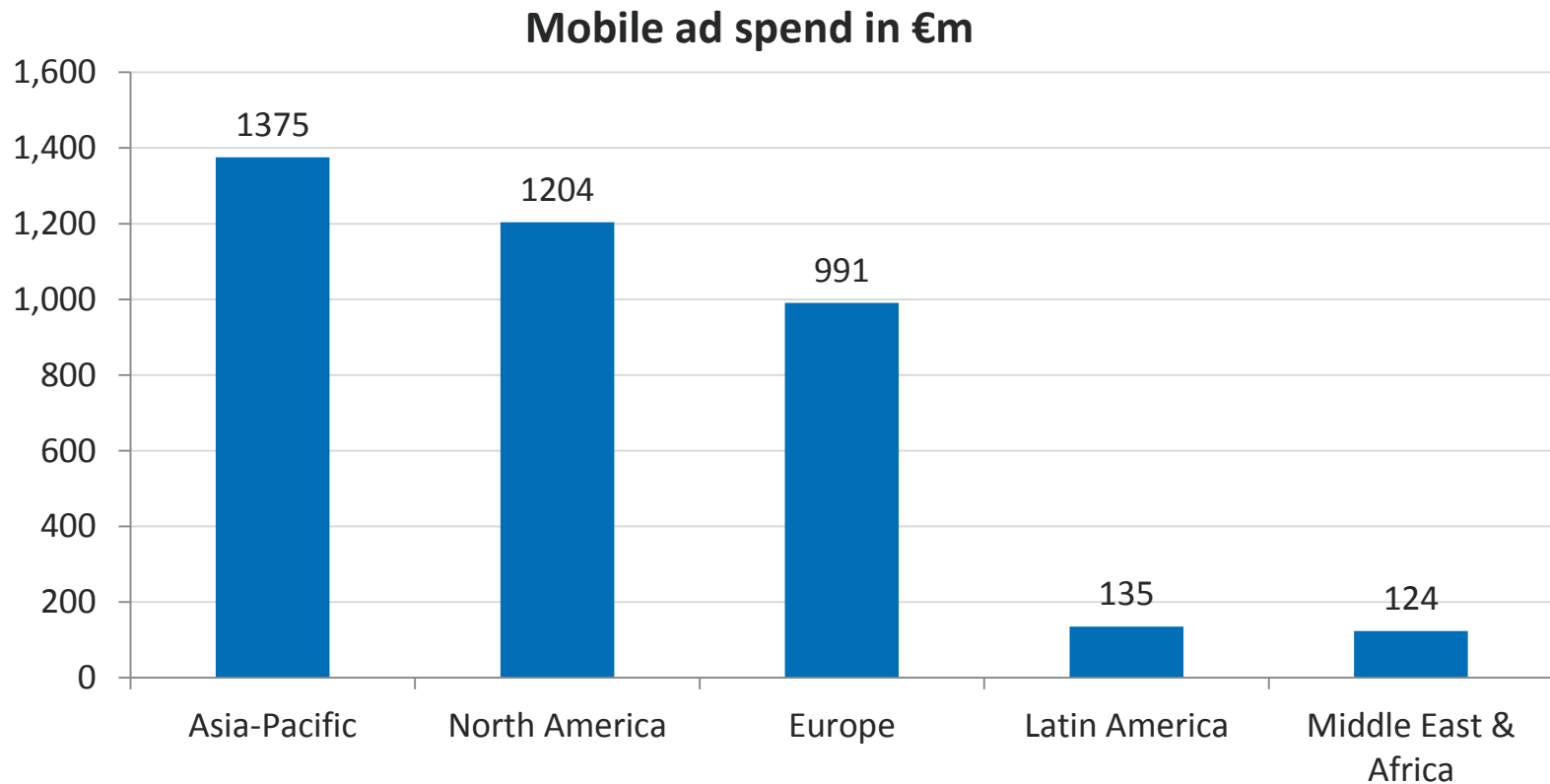
Methodology

- IHS Screen Digest authored the research based on identification of mobile ad spend reported by IABs, harmonising the data, and employing statistical and econometric models to infer a global market size, split across advertising formats.
- 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 harmonized to adjust for discounts and agency commissions. Modeled data is based on variables such as smartphone penetration, 3G subscriptions, messaging volume. Model has been refined based on benchmarking variables such as ad spend per capita and ad spend per mobile subscriber 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.

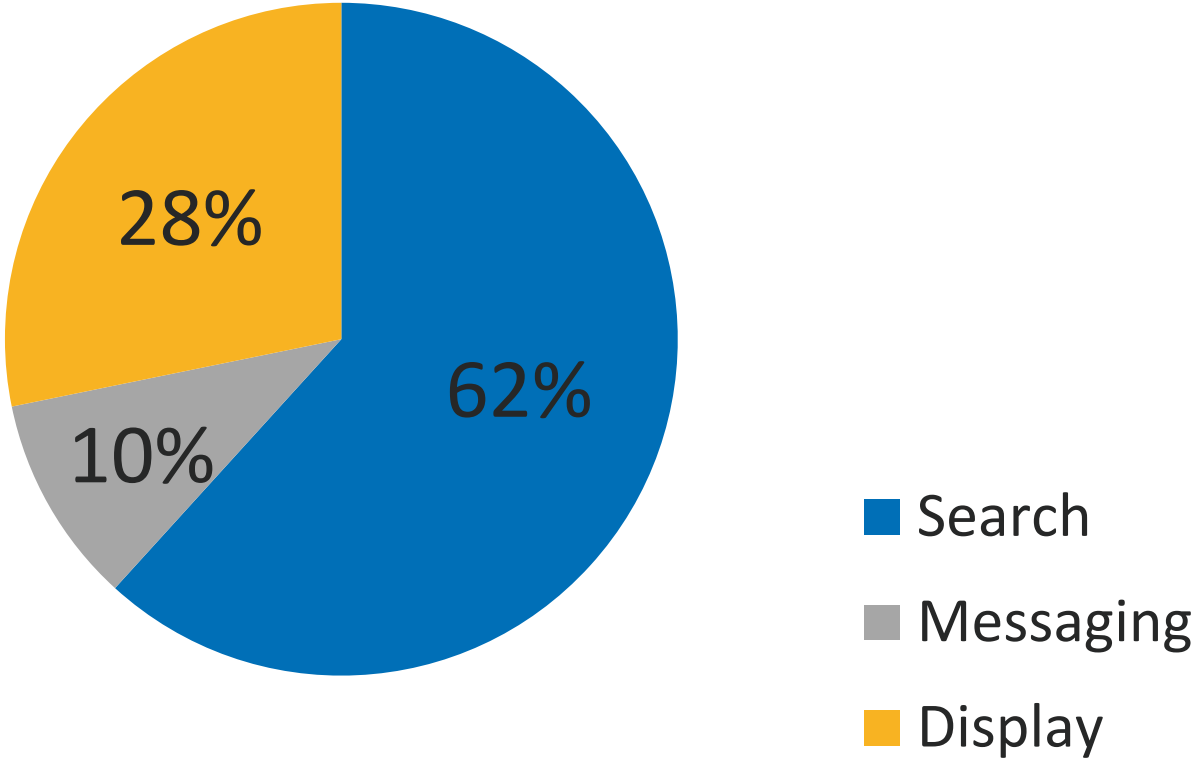
Total global mobile advertising spend

€3.8 billion
(\$5.3 billion)

Mobile advertising spend by region

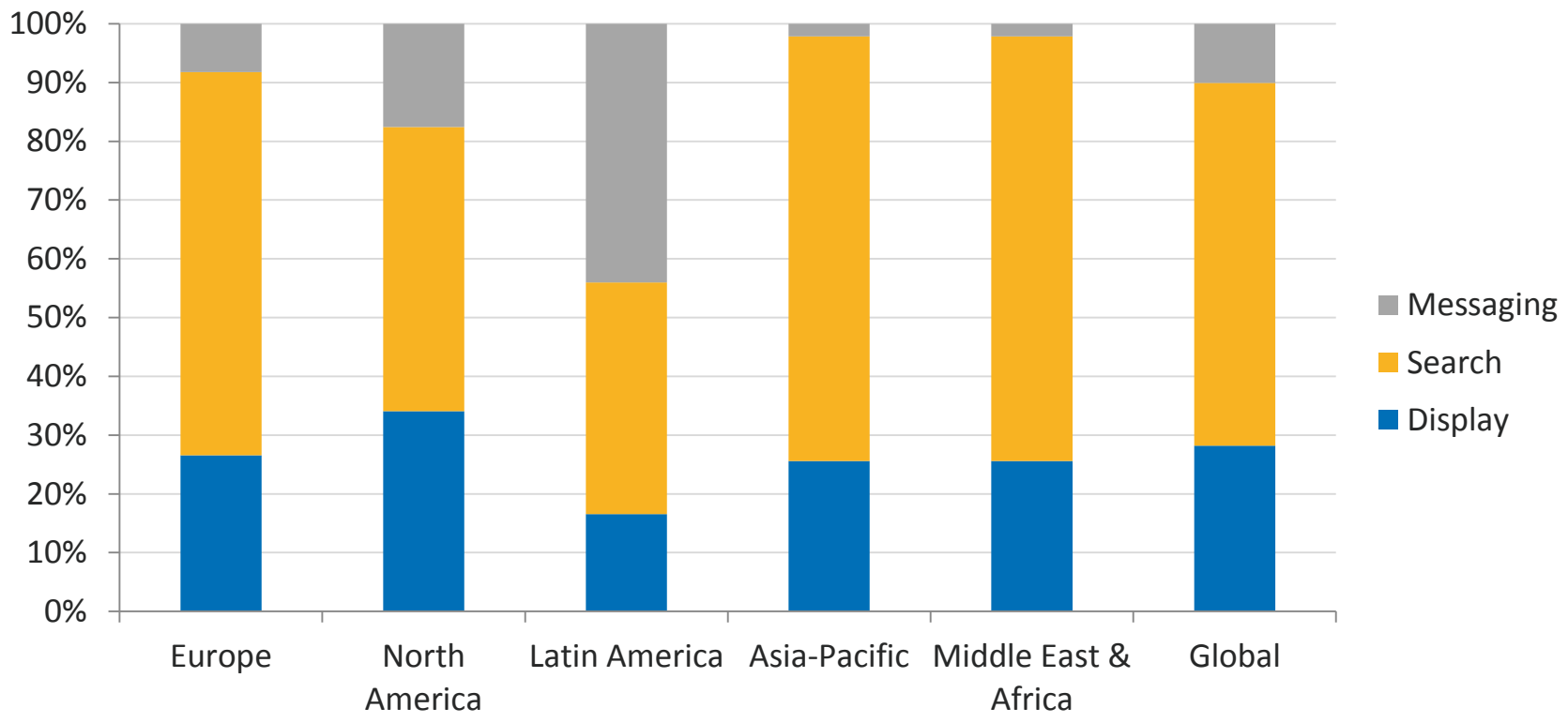


Mobile advertising dominated by search



Proliferation of formats varies across markets

- Share



Numbers in EU€

2011: Mobile ad spend in €million

	Display	Search	Messaging	Total
Europe	263	646	81	991
North America	410	582	211	1,204
Latin America	22	53	59	135
Asia-Pacific	352	994	30	1,375
Middle East & Africa	32	89	3	124
Global	1,080	2,364	385	3,829

Numbers in US\$

2011: Mobile ad spend in \$million

	Display	Search	Messaging	Total
Europe	367	900	114	1,380
North America	572	811	295	1,677
Latin America	31	74	83	188
Asia-Pacific	491	1,384	41	1,916
Middle East & Africa	44	124	4	172
Global	1,504	3,292	536	5,333

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