

Global Mobile Advertising Revenue 2015

The state of mobile advertising around the world

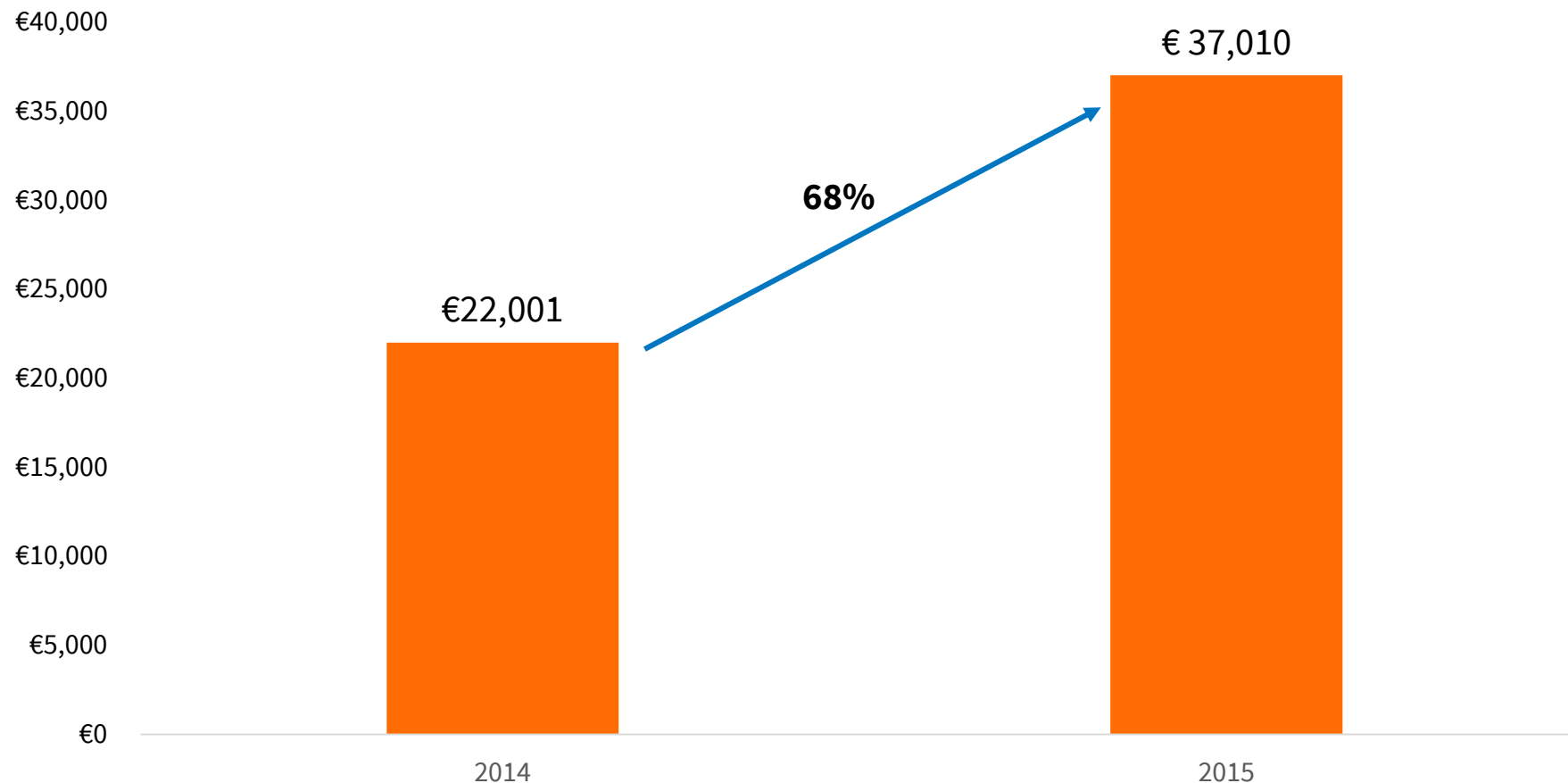
September 2016



Global mobile advertising revenue up 68% year-on-year to €37bn



Global mobile ad revenue (€m)*

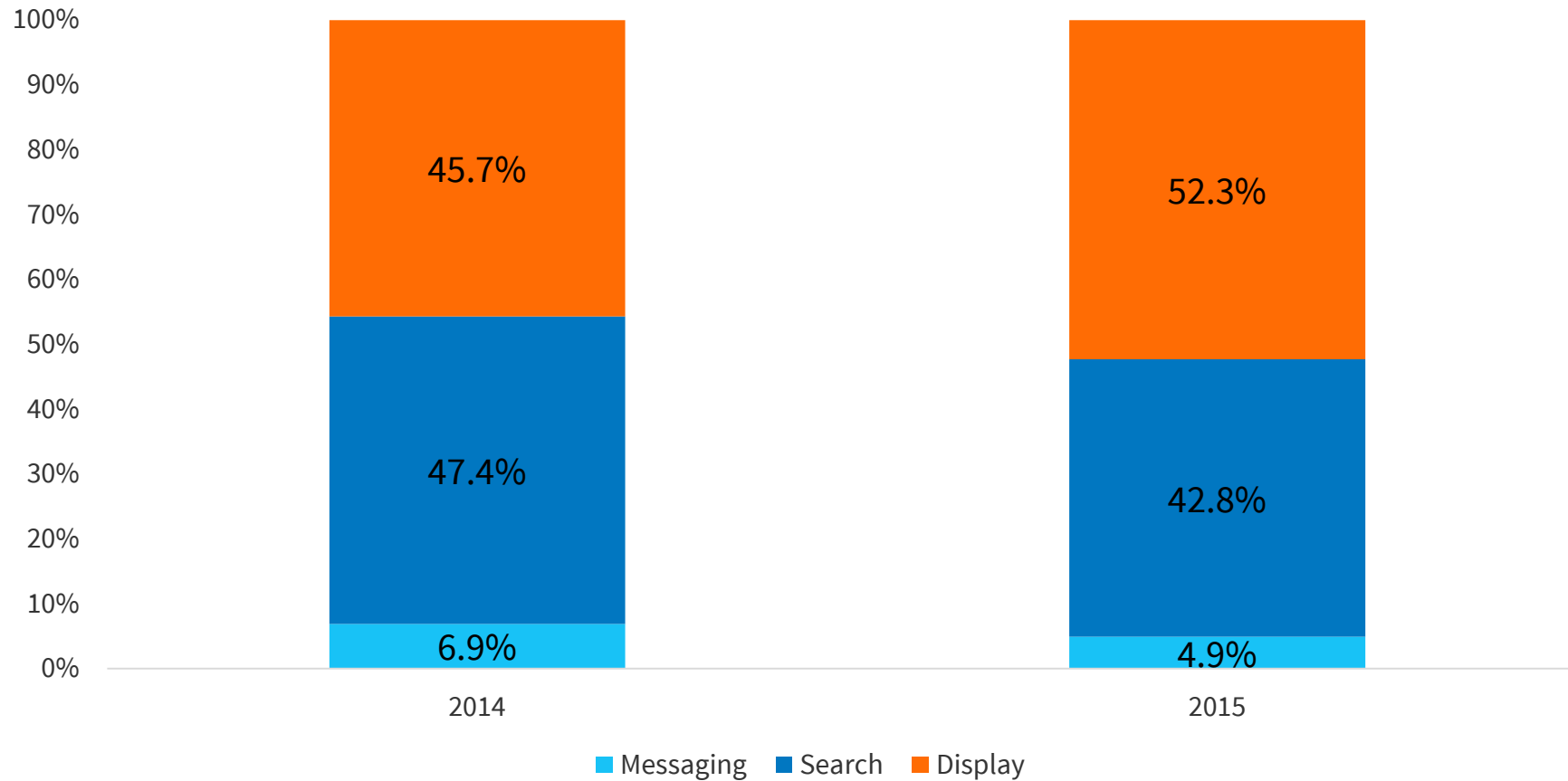


Source: IAB Europe, IAB, IHS

Display takes lions share of display as messaging faces further pressure



Mobile format shares in 2015

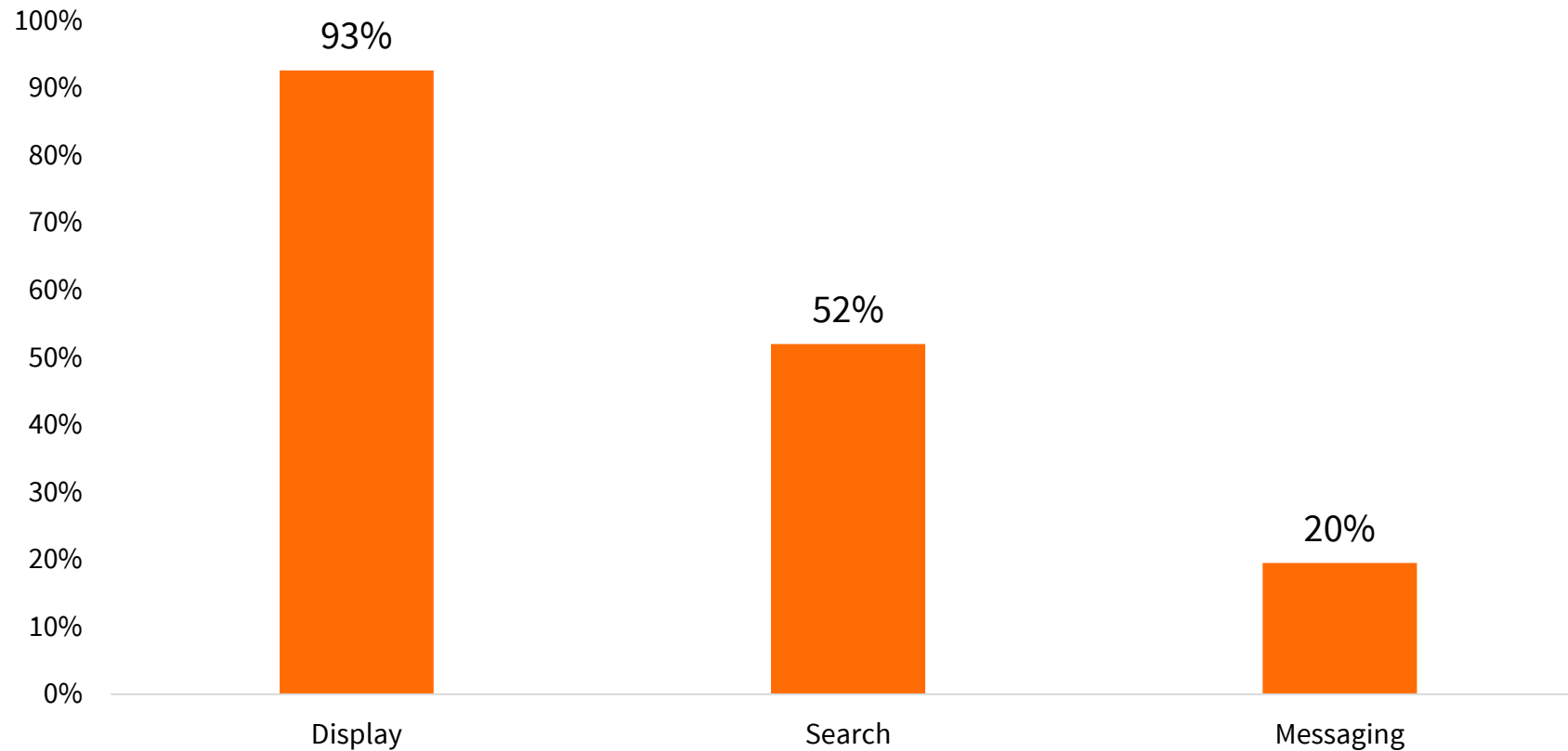


Source: IAB Europe, IAB, IHS

Mobile display advertising revenue growth outperforms other formats



Mobile ad format growth by format in 2015

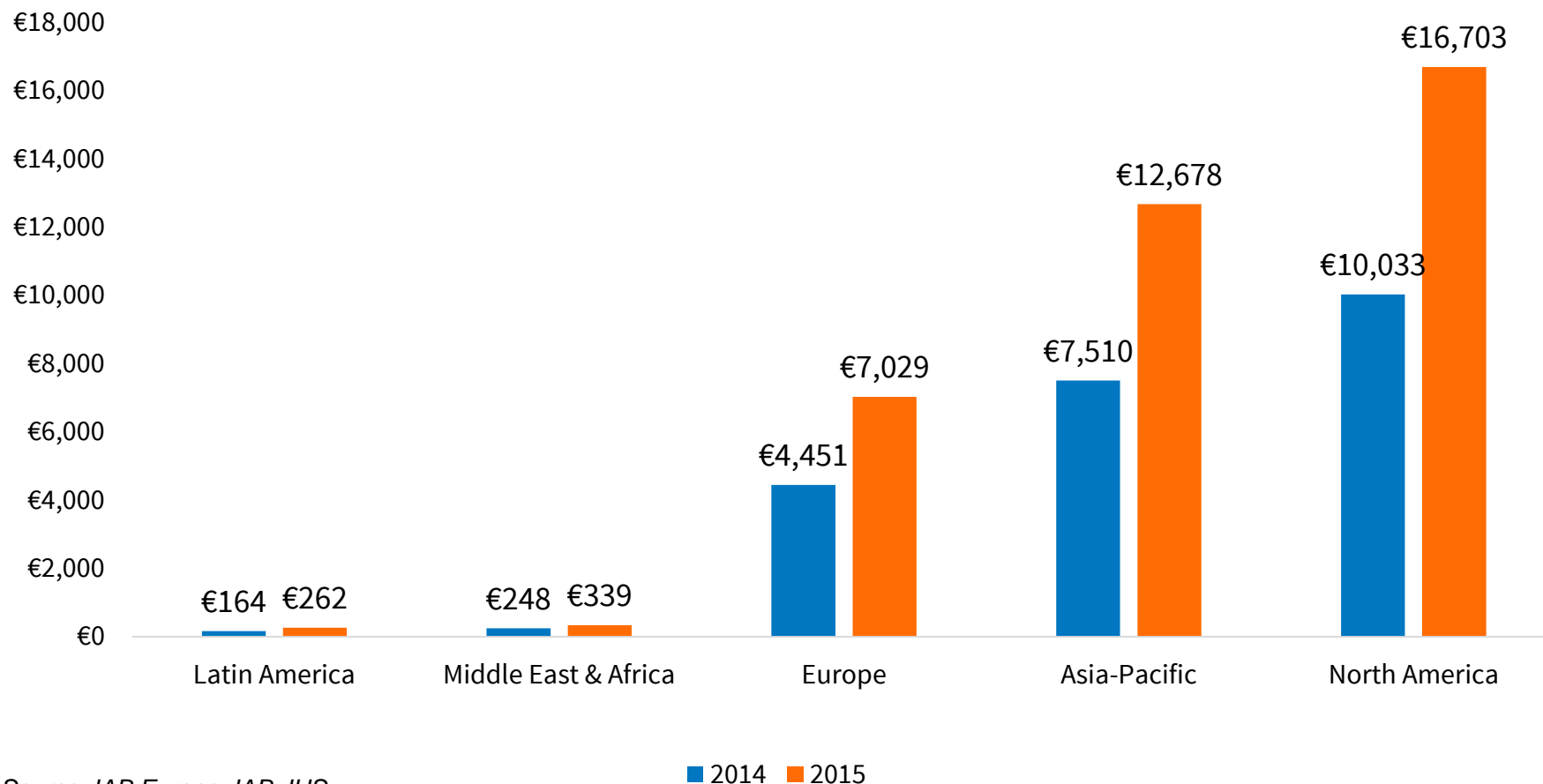


Source: IAB Europe, IAB, IHS

North America remains the largest mobile advertising market



2014 vs 2015: Mobile ad revenues by region (€m)



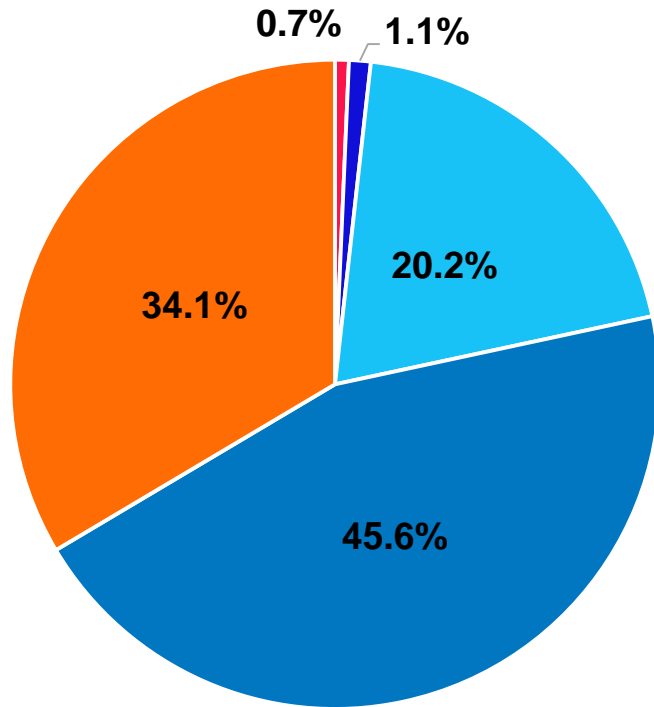
Source: IAB Europe, IAB, IHS



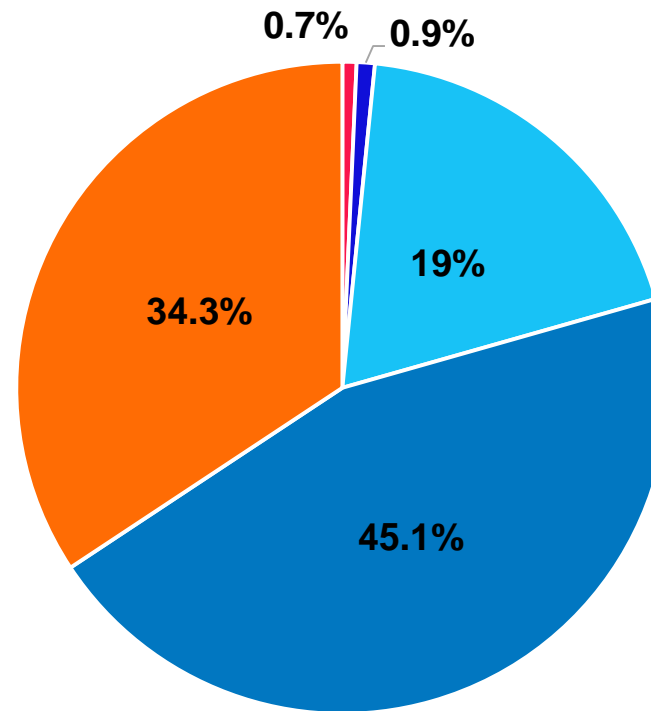
Minor changes in share of global mobile advertising revenue



2014



2015



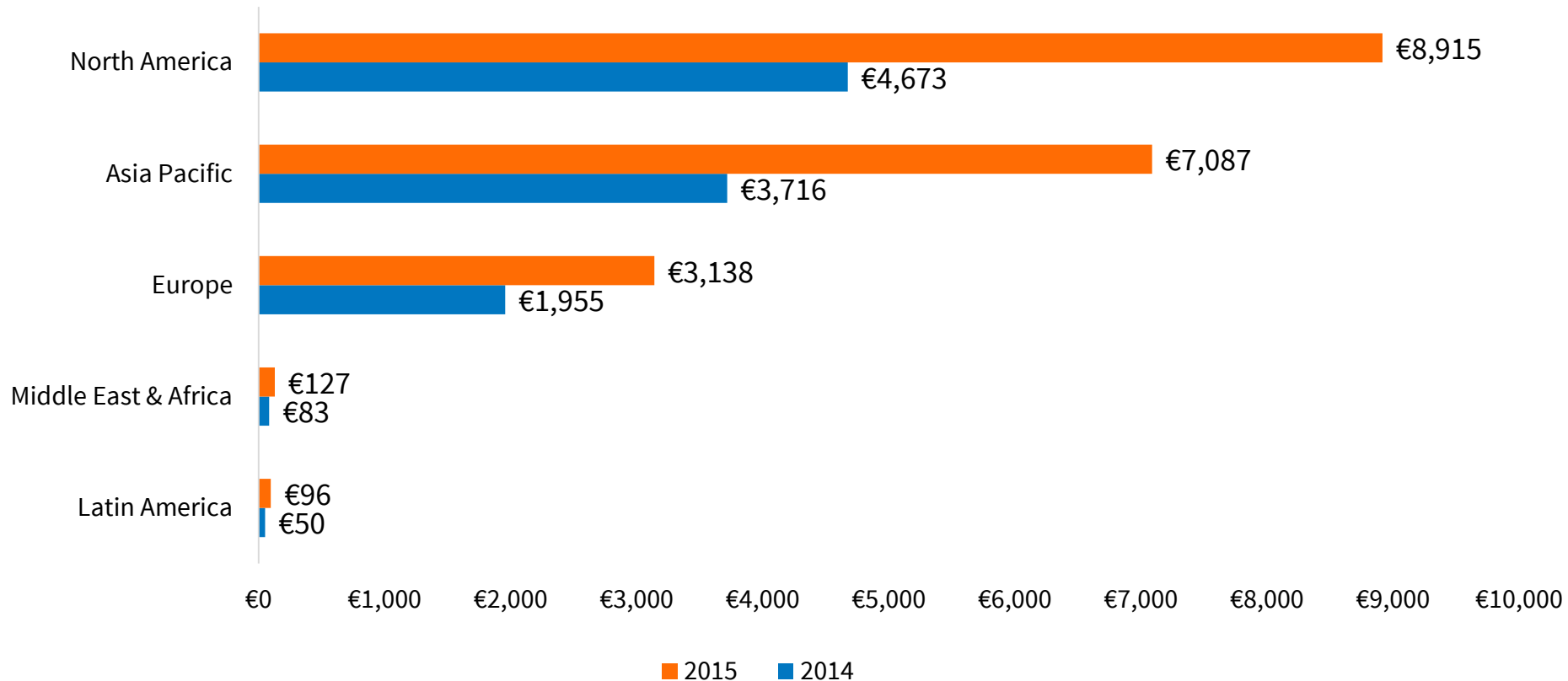
- Latin America
- Middle East and Africa
- Europe
- North America
- Asia Pacific

Source: IAB Europe, IAB, IHS

North America remains largest mobile display advertising market



2014 vs 2015: Mobile display ad revenues by region (€m)

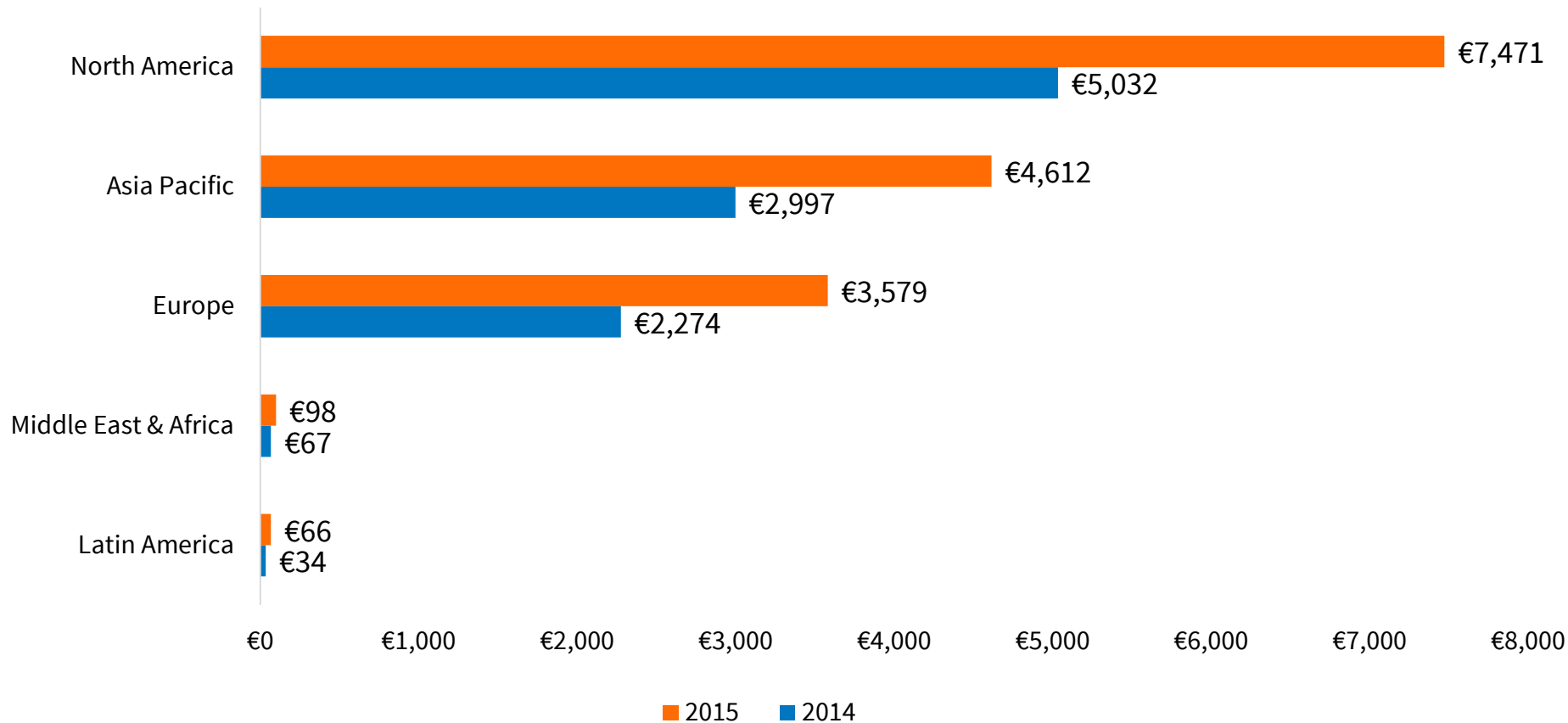


Source: IAB Europe, IAB, IHS

Unchanged regional ranking in mobile search advertising



2014 vs 2015: Mobile search ad revenues by region (€m)

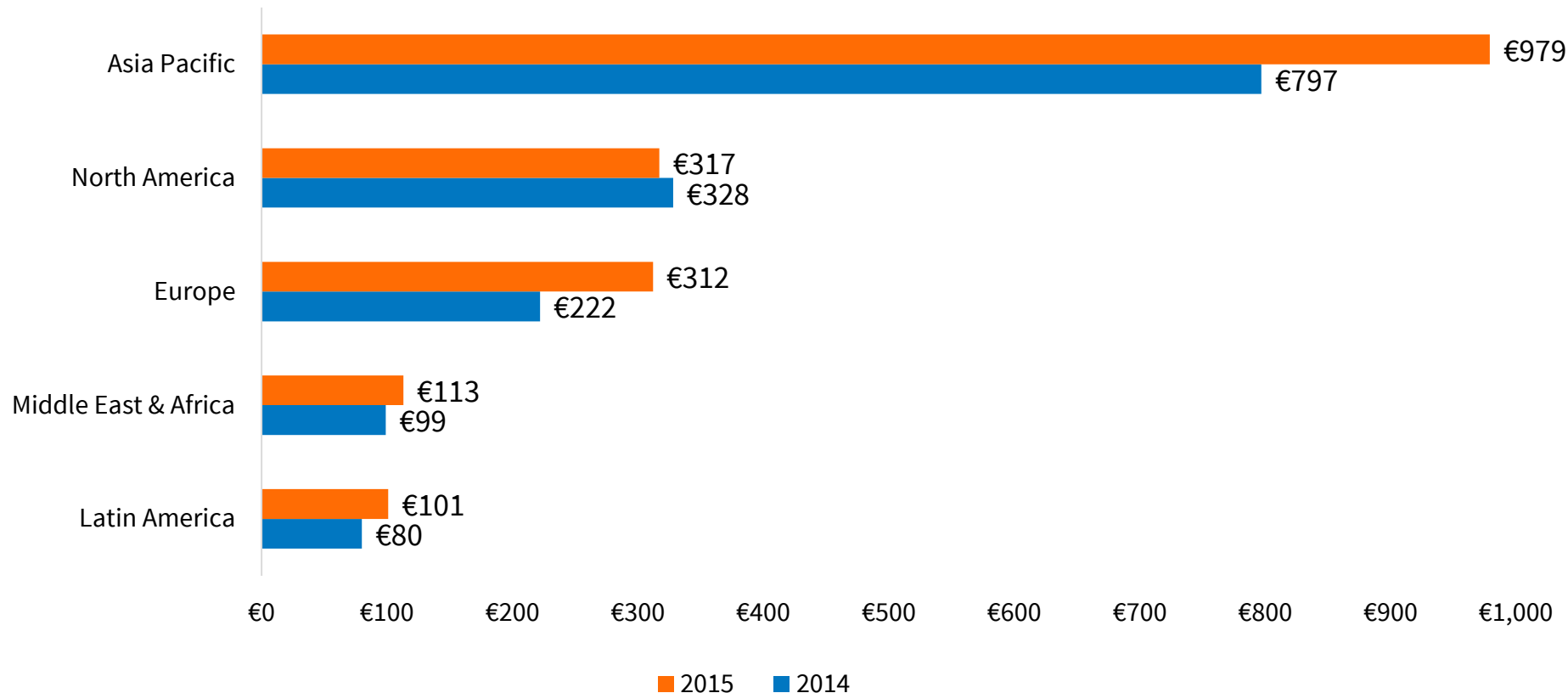


Source: IAB Europe, IAB, IHS

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



2014 vs 2015: Mobile messaging ad revenues by region (€m)

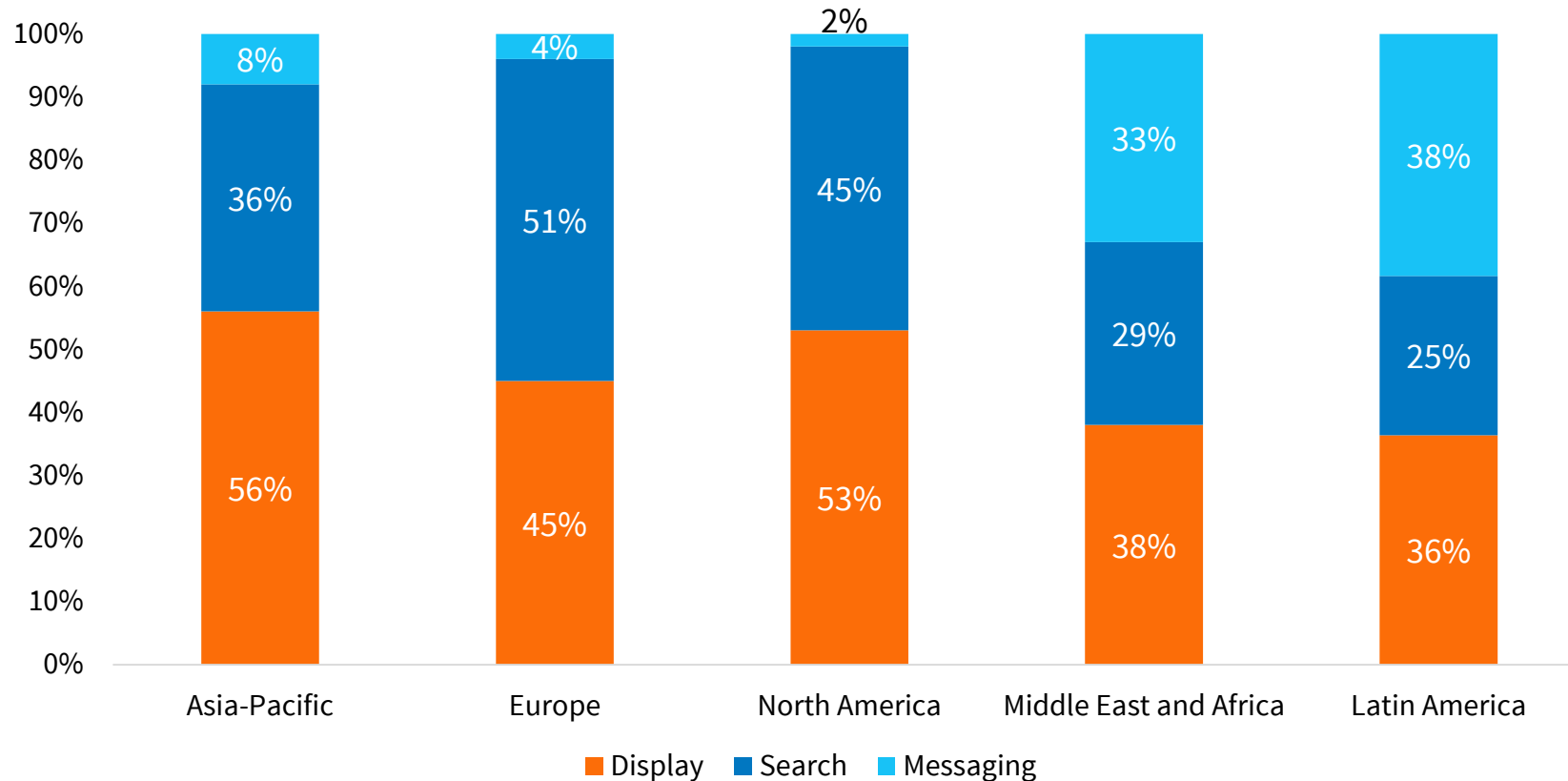


Source: IAB Europe, IAB, IHS

Strong differences across format distribution globally



Mobile ad revenue by format: regions

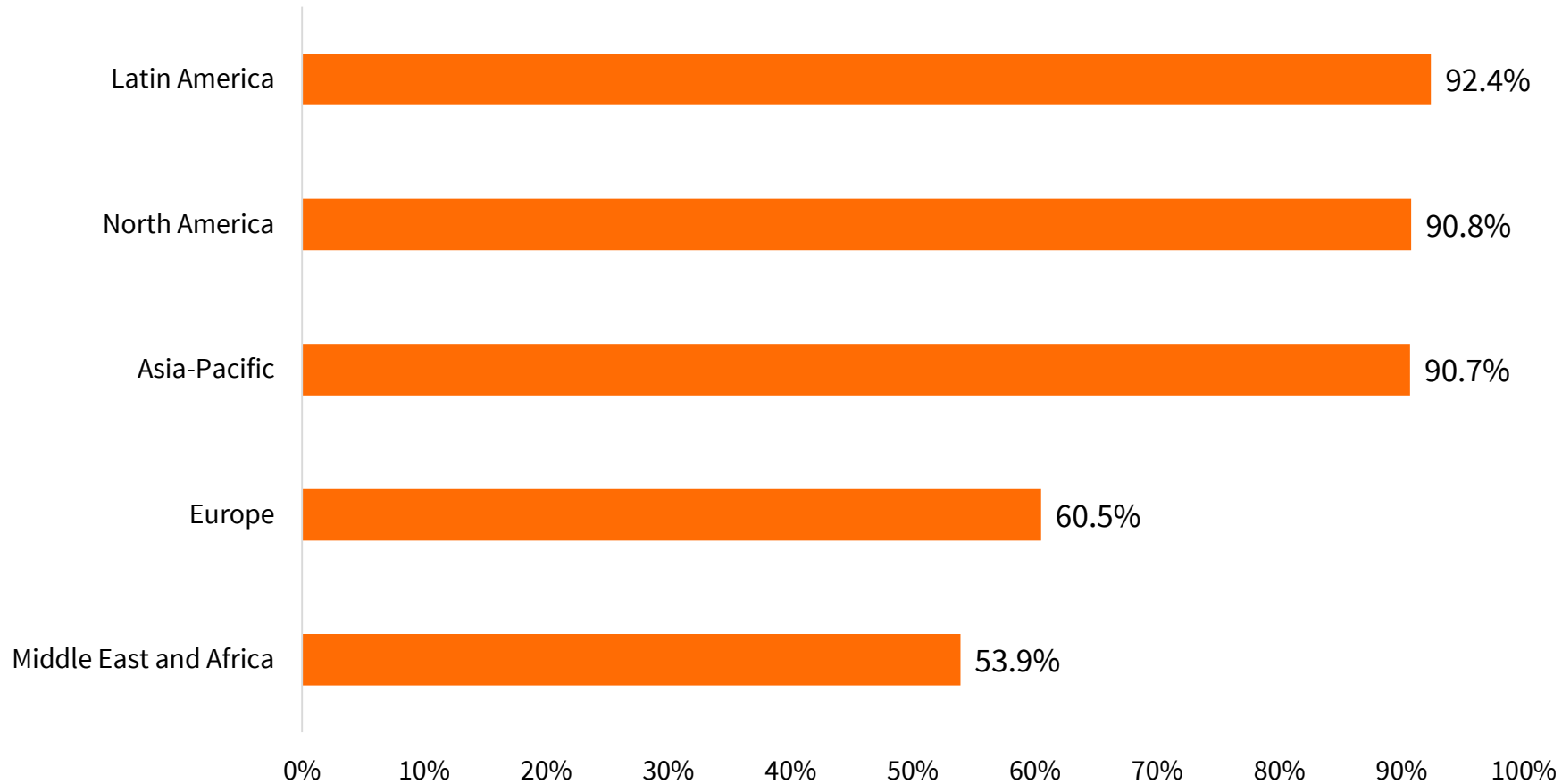


Source: IAB Europe, IAB, IHS

Latin America mobile display market grows faster than other regions



Mobile display ad growth in 2015 by region

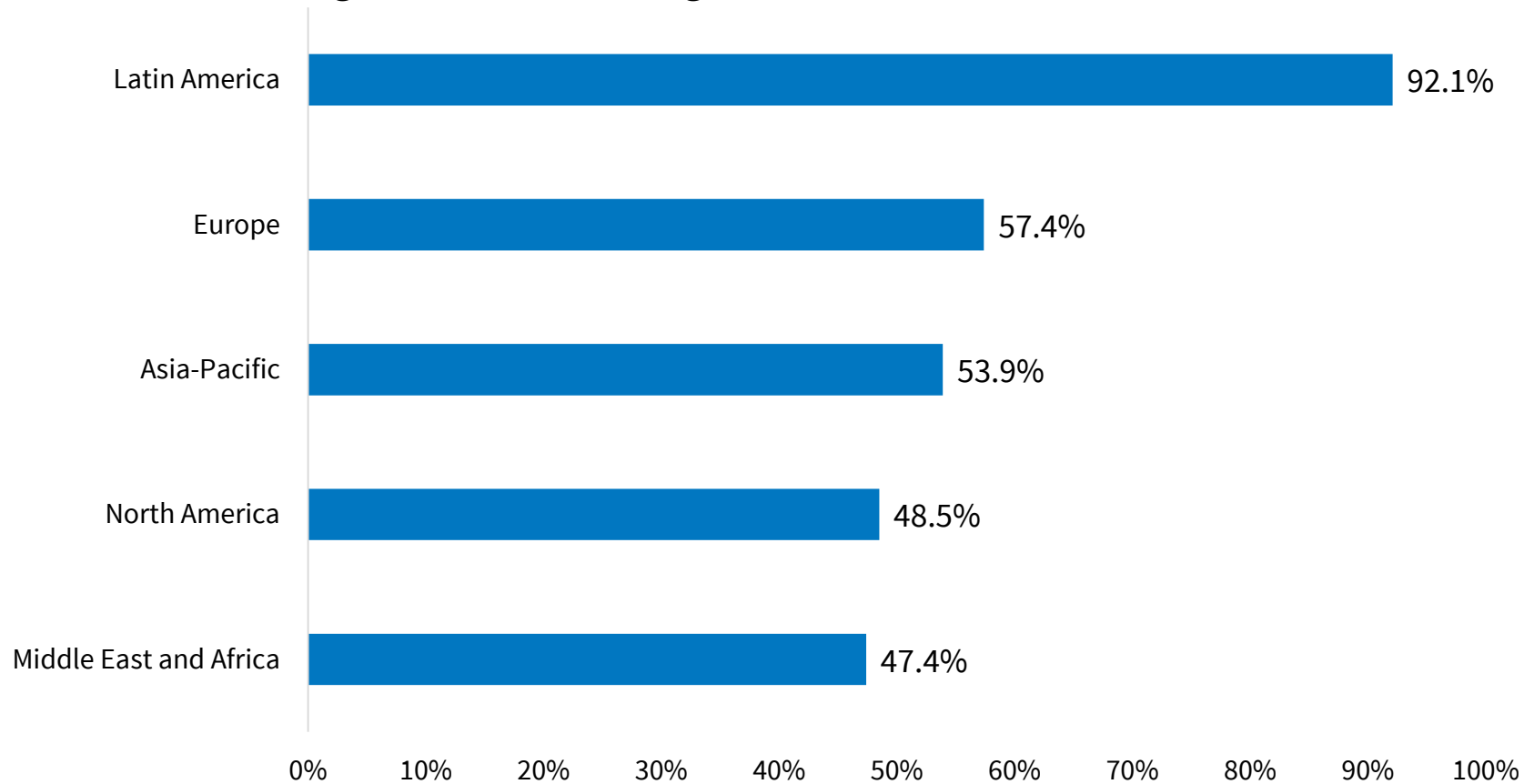


Source: IAB Europe, IAB, IHS

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



Mobile search ad growth in 2015 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.
- **Messaging (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.

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.

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