

Introduction

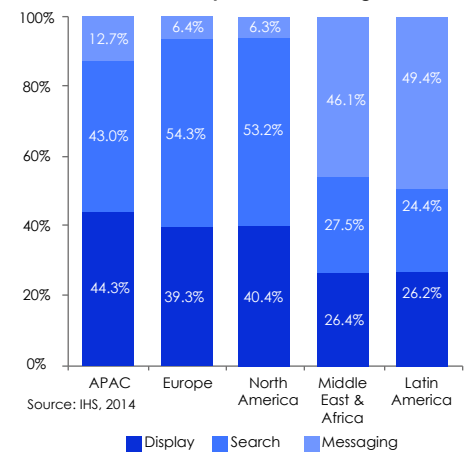
This Market Map provides a simple visual overview of the rapidly developing global mobile marketing & advertising ecosystem.

Data is now at the heart of mobile marketing and programmatic trading has become more diverse, accounting for a significant share of display spend. Critically, mobile has emerged as the key consumer touch-point in multi-screen media and omni-channel retail environments - driving a focus on cross screen tracking & targeting.

Key Metrics

- \$18 billion estimated value of mobile advertising worldwide in 2014¹
- \$48 billion estimated value of mobile advertising worldwide in 2017²
- 22.6% share of digital ad spend on mobile in the UK in 2014³
- 73% share of Facebook ad revenue from mobile ads in Q1 2015
- \$8.4 billion predicted mobile programmatic spend in the US in 2015⁴
- 21% forecasted CAGR of global mobile advertising spend between 2013-2018⁶

Mobile Ad Revenue By Format and Region in 2013



Sources:
 1 & 2) Gartner Forecast: Mobile Advertising, Worldwide, 2010-2017
 3) PwC/IAB UK 'Digital Adspend Study', 2014
 4) Facebook Financial Results Q4 2014
 5) eMarketer, 2014
 6) PwC 2013, Global entertainment and media outlook 2014-2018

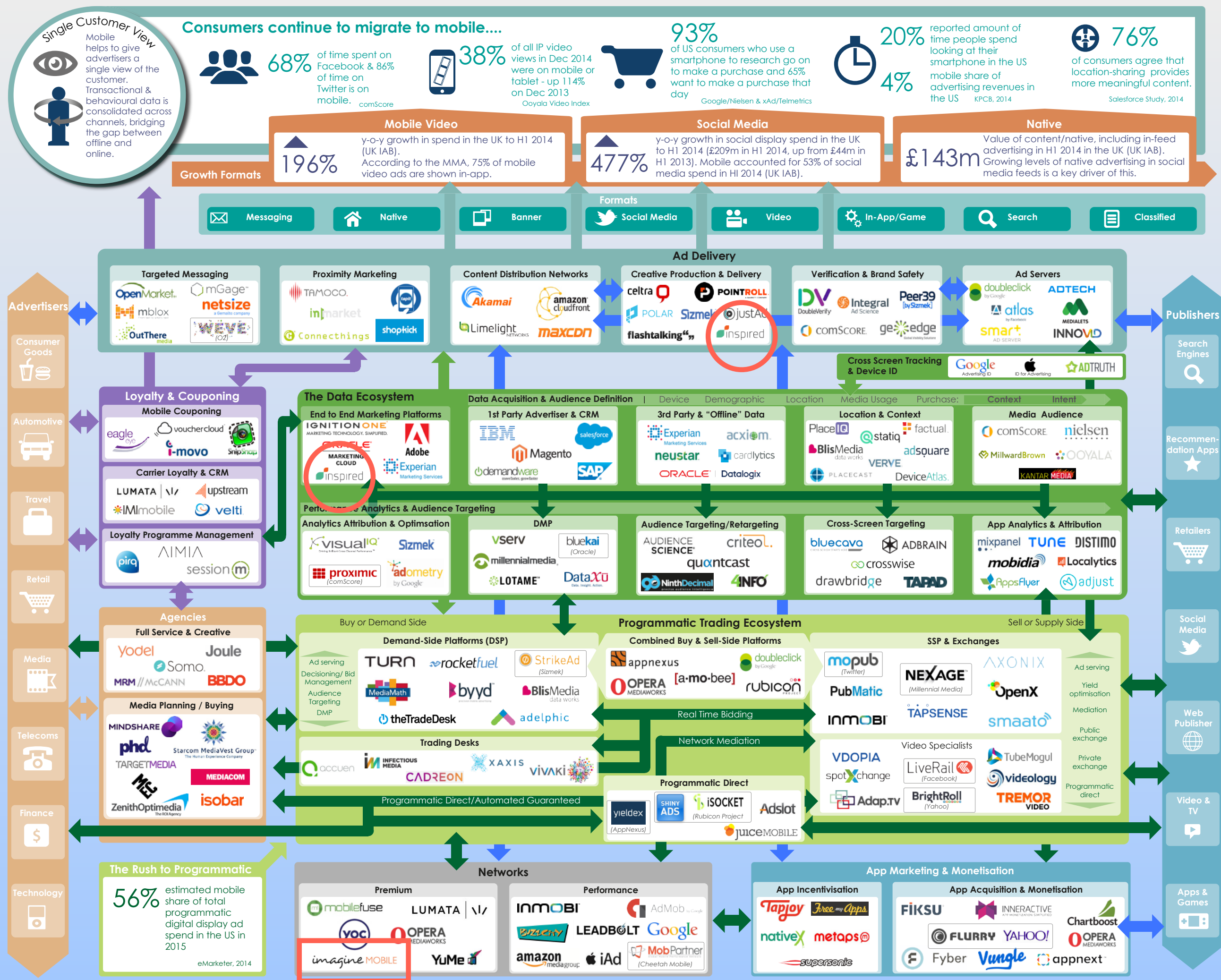
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Single Customer View
 Mobile helps to give advertisers a single view of the customer. Transactional & behavioural data is consolidated across channels, bridging the gap between offline and online.

Consumers continue to migrate to mobile...

- 68% of time spent on Facebook & 86% of time on Twitter is on mobile. (comScore)
- 38% of all IP video views in Dec 2014 were on mobile or tablet - up 114% on Dec 2013. (Ooyala Video Index)
- 93% of US consumers who use a smartphone to research go on to make a purchase and 65% want to make a purchase that day. (Google/Nielsen & xAd/Telmetrics)
- 20% reported amount of time people spend looking at their smartphone in the US mobile share of advertising revenues in the US. (KPCB, 2014)
- 4%
- 76% of consumers agree that location-sharing provides more meaningful content. (Salesforce Study, 2014)

Growth Formats

- Mobile Video:** 196% y-o-y growth in spend in the UK to H1 2014 (UK IAB). According to the MMA, 75% of mobile video ads are shown in-app.
- Social Media:** 477% y-o-y growth in social display spend in the UK to H1 2014 (£209m in H1 2014, up from £44m in H1 2013). Mobile accounted for 53% of social media spend in H1 2014 (UK IAB).
- Native:** £143m Value of content/native, including in-feed advertising in H1 2014 in the UK (UK IAB). Growing levels of native advertising in social media feeds is a key driver of this.

Formats

- Messaging
- Native
- Banner
- Social Media
- Video
- In-App/Game
- Search
- Classified

Ad Delivery

- Targeted Messaging:** OpenMarket, mGage, mblox, netsize, WEVE, OutThere media
- Proximity Marketing:** TAMOCO, in|market, Connectthings, shopkick
- Content Distribution Networks:** Akamai, amazon cloudfront, Limelight, maxcdn
- Creative Production & Delivery:** celtra, POLAR, Sizmek, flashalking, inspired, POINTROLL, justAd
- Verification & Brand Safety:** DV DoubleVerify, Integral Ad Science, Peer39, comSCORE, ge|edge
- Ad Servers:** doubleclick, atlas, smart, ADTECH, MEDIALETS, INNOVO

The Data Ecosystem

- End to End Marketing Platforms:** IGNITION ONE, MARKETING CLOUD, Adobe, Experian
- 1st Party Advertiser & CRM:** IBM, salesforce, Magento, SAP, demandware
- 3rd Party & "Offline" Data:** Experian, acxiom, neustar, cardlytics, ORACLE, Datalogix
- Location & Context:** PlaceIQ, BlisMedia, statiq, adsquare, VERVE, PLACECAST, DeviceAtlas
- Media Audience:** comSCORE, nielsen, MillwardBrown, OYOALA, KANTAR MEDIA
- Analytics Attribution & Optimisation:** visualiq, Sizmek, proximic, adometry
- DMP:** vserve, bluekai, millennialmedia, LOTAME, DataXu
- Audience Targeting/Retargeting:** AUDIENCE SCIENCE, criteo, NinthDecimal, 4INFO
- Cross-Screen Targeting:** bluecava, ADBRAIN, drawbridge, crosswise, TAPAD
- App Analytics & Attribution:** mixpanel, TUNE, DISTIMO, mobidia, Localytics, AppsFlyer, adjust

Programmatic Trading Ecosystem

- Buy or Demand Side:** Demand-Side Platforms (DSP) - Ad serving, Decisioning/Bid Management, Audience Targeting, DMP. Includes TURN, rocketfuel, StrikeAd, MediaMath, byyd, BlisMedia, theTradeDesk, adelphic.
- Combined Buy & Sell-Side Platforms:** appnexus, OPERA, [a-mo-bee], rubicon, doubleclick, mopub, PubMatic, INMOBI, NEXAGE, TAPSENSE, OpenX, smaato.
- SSP & Exchanges:** Video Specialists - VDOPIA, spotXchange, LiveRail, TubeMogul, Adap.tv, BrightRoll, TREMOR VIDEO.
- Trading Desks:** accuen, INFECTIOUS MEDIA, CADREON, XAXIS, vivaki
- Programmatic Direct:** yieldex, SHINY ADS, iSOCKET, Adslot, juiceMOBILE

Networks

- Premium:** mobilefuse, LUMATA, yoc, OPERA, imagine MOBILE, YuMe
- Performance:** INMOBI, LEADBOLT, Google, amazon, iAd, MobPartner

App Marketing & Monetisation

- App Incentivisation:** Tapjoy, Free my Apps, nativeX, metaps, supersonic
- App Acquisition & Monetisation:** FIKSU, INNERACTIVE, Chartboost, FLURRY, YAHOO!, OPERA, Fyber, Vungle, appnext

The Rush to Programmatic

56% estimated mobile share of total programmatic digital display ad spend in the US in 2015. (eMarketer, 2014)

- Advertisers
- Consumer Goods
- Automotive
- Travel
- Retail
- Media
- Telecoms
- Finance
- Technology

- Publishers
- Search Engines
- Recommendation Apps
- Retailers
- Social Media
- Web Publisher
- Video & TV
- Apps & Games