



THE GLOBAL MOBILE LANDSCAPE

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Director of Research

IAB Australia

iab.
australia

Digital Now the Dominant Medium



\$3,986m
Online Advertising

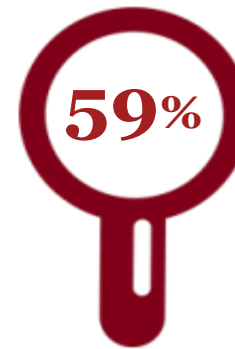


\$3,877m
Free-to-Air TV Advertising

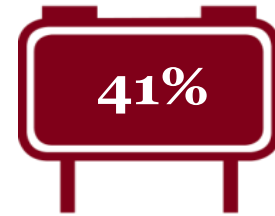
Mobile Ad in AU: \$349m in CY13

Dec Quarter 13

- **14%** of digital ad \$
- **19%** of digital display \$
- **16%** of search \$



Search



General Display

Global Mobile Revenues - % of Digital

AU
14%

Q4 CY13

US
15%

1H CY13

UK
16%

1H CY13

CA
4%

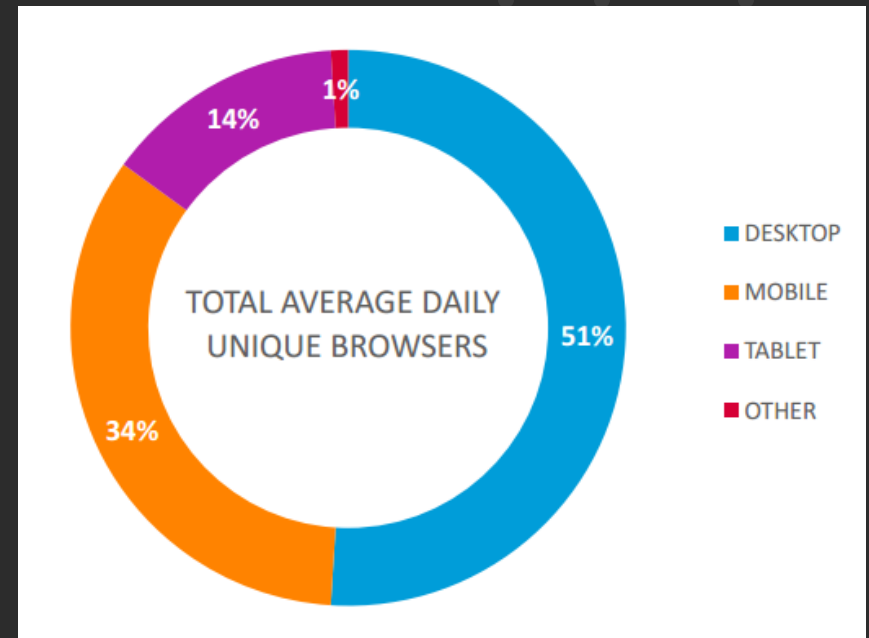
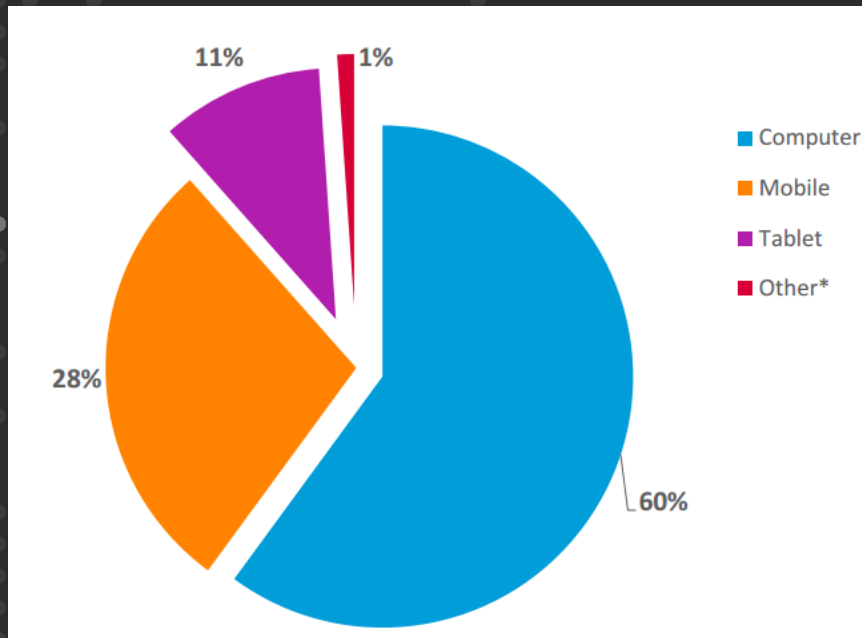
CY13 E

NZ
2%

Q4 CY13

Behaviour: AU

Browsing Changes from Aug 13 to Feb 14



Behaviour: US

30 sites
visited per
person



27 apps
visited per
person

Mobile Web Brands			Apps		
Rank	Brands	Active Reach %	Rank	Brands	Active Reach %
1	Google	75.1	1	Facebook	74.8
2	Facebook	64.1	2	Google Search	57.3
3	Yahoo	41.5	3	Google Play	55.2
4	Amazon	38.1	4	Google Maps	47.3
5	Twitter.com	36.8	5	Gmail	46.1
6	Wikipedia	29.5	6	YouTube	38.7
7	YouTube	27.0	7	Chrome	33.0
8	MSN/ WindowsLive/Bing	24.4	8	Google+	29.0
9	AOL Media Network	22.0	9	Instagram	25.3
10	eBay	16.3	10	Facebook Messenger	24.8

Insert Bad App Pun Here

Top Apps Contributing to Total App Time

Rank	Brands	Time Per Person
1	Facebook	6:53:41
2	Chrome	3:03:05
3	Pandora	4:33:33
4	Instagram	3:30:02
5	Candy Crush Saga	5:49:20
6	Google Search	1:15:29
7	Twitter	2:44:58
8	Gmail	1:25:52
9	YouTube	1:31:23
10	Facebook Messenger	2:09:46

Apps represented
81% of mobile
sessions & **89%**
of time in US in
Feb

THANK YOU TO OUR SURVEY SPONSORS





INDUSTRY PROJECTS

Alice Manners

CEO

IAB Australia

Two Speed Digital Ad Economy



What are we doing to support mobile advertising?

- **Leadership: Mobile Advertising Council**
- **Measurement: PWC OAER, Mobile Panel pilot**
- **Education: IAB Training Programme**
- **Creative: Creative Showcase & Agency Advisory Board**

New IAB Training Courses - Sydney



**DIGITAL MEDIA
SALES**

2 day course
7 & 14 May



**DIGITAL
FUNDAMENTALS**

2 day course
8 & 15 May



**PROGRAMMATIC
TRADING**

1 day course
28 May



**AD
OPERATIONS**

1 day course
17 June



**DATA FOR
ADVERTISING**

1 day course
23 October



**MOBILE
MARKETING**

1 day course
13 November



**SOCIAL
ADVERTISING**

1 day course
25 November

New IAB Training Courses - Melbourne



**DIGITAL MEDIA
SALES**

2 day course
3 & 4 July



**AD
OPERATIONS**

1 day course
21 August



**DIGITAL
FUNDAMENTALS**

2 day course
7 & 8 August



**PROGRAMMATIC
TRADING**

1 day course
30 October

THANK YOU TO OUR SURVEY SPONSORS



Thank You.

www.iabaustralia.com.au