



July 3, 2009

BuzzCity
Global Mobile
Advertising Index

Q2 2009



1. This report documents the growth of mobile internet advertising and represents inventory sold across the BuzzCity Mobile Internet Advertising Network.
2. Notably, this report draws from the quarterly fill rate on the BuzzCity mobile advertising network and represents a measure of advertiser demand for mobile internet advertising.
3. In this report we track the growth of the network, and by extension, the growth of off-portal mobile internet use, in more than 200 countries around the world.
4. In the second quarter of 2009, just over 7.5 billion advertiser banners were delivered across the entire network. This represents a Q-on-Q decline of 10%. Eleven of the top 20 countries showed a decline (negative growth) which overshadowed the growth in other markets.
5. Among the **Top 5**, Indonesia, India, United States and South Africa remained unchanged in ranking. A new entry at 5th place was United Kingdom having risen 4 places from the previous quarter.
 - a. Indonesia remains in top position - more than 3.8 billion banners were served to Indonesian audiences – although traffic dropped by a significant 14% from the previous quarter. Indonesian traffic dropped by 600million impressions as mobile advertisers realigned their advertising campaigns due to operators tightening controls on subscription services by mobile VAS players.

- b. Indian usage continues to increase (28%), continuing the growth of the last quarter. In Q2, Indian traffic exceeded 1 billion banners delivered.
- c. US traffic suffered a slight decline (-8%) but advertiser interest remained high and kept the US in 3rd place. There was increased demand for US traffic from US based and foreign mobile players.
- d. South African traffic grew (8%) in the second quarter, reversing the trend of previous quarters but remained in fourth place behind USA. Interest in South African audiences remained from mobile players and brand advertisers.
- e. United Kingdom rose to 5th place reflecting increased advertiser interest in off portal advertising.

6. Among the **Top 10**

- a. Philippines rose to 6th place although traffic dropped by 1%.
- b. Egypt (7th place) and China (8th place) saw massive drop in traffic. Thirty four and twenty seven percent respectively.
- c. Saudi Arabian traffic increased tremendously (63%), and is now ranked 9th (Previously ranked 19th). Kenya grew by 15% and climbed four places to 10th place.
- d. Romania, (6th place in Q1), saw the biggest drop in traffic (eighty four percent) and fell to 25th place.

7. In **The Next 10**, countries noted for sustained growth are

- a. Malaysia (2%) rose 4 places and is now at 11th place,
- b. Canada (5%) at 12th place also climbed four notches, and

- c. Thailand (51%), France (26%) and Italy (23%) continue to grow. Thailand and France each climbed five places. Italy climbed four places.
8. Libya and Tanzania continues to show rapid double digit declines from the last quarter.
9. Among the Top 20, nine markets showed positive growth. Despite Romania dropping out, the Top 20 now lists three EU countries (United Kingdom, France and Italy) for the first time. Other markets in the EU also showed continuing growth; Germany (100%) in 21st place, Norway (21%) in 22nd, Greece (119%) and Turkey (101%) demonstrated continued increase.
10. Overall, 23 countries had monthly traffic exceeding 10 million impressions per month. This suggests continued usage of the mobile internet and drops in ads served reflected fluctuating advertiser demand, particularly in emerging markets. Advertiser demand in developed markets continues to increase and contributed to an 80% Y-on-Y growth.



Ad Banners Served : BuzzCity Mobile Internet Advertising Network

Ranking		Country	Q1 '09	Q2 '09	Q-on Q Growth
Q1'09	Q2 '09				
1	1	Indonesia	4,378,945,983	3,777,611,188	-14%
2	2	India	841,620,420	1,074,462,736	28%
3	3	United States	527,622,153	486,972,499	-8%
4	4	South Africa	427,839,867	460,816,797	8%
9	5	United Kingdom	113,369,462	133,036,952	17%
8	6	Philippines	125,078,495	124,280,302	-1%
5	7	Egypt	162,183,711	107,594,556	-34%
7	8	China	129,649,411	94,927,953	-27%
19	9	Saudi Arabia	56,586,799	92,487,554	63%
14	10	Kenya	80,404,957	92,070,375	15%
15	11	Malaysia	79,887,471	81,112,077	2%
16	12	Canada	75,565,080	79,248,999	5%
18	13	Thailand	65,813,320	73,146,196	11%
11	14	Nigeria	90,917,538	59,707,605	-34%
10	15	Bangladesh	112,814,133	57,302,689	-49%
21	16	France	39,782,700	50,046,238	26%
12	17	Libya	86,307,837	48,414,633	-44%
13	18	Tanzania	83,765,354	48,179,296	-42%
23	19	Italy	34,577,558	42,616,524	23%
17	20	Brunei	73,019,631	42,484,358	-42%

Banners served on Top 20 Countries	7,719,135,314	7,026,519,527	
Banners served across the network	8,523,586,447	7,636,146,167	-10%
Top 20 countries represent 92% of all banners served			