



BuzzCity
Global Mobile
Advertising Index

Q4 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 in 2009 of more than 200 countries around the world. Overall a total of 27.4 billion impressions were delivered in 2009, a growth of more than 41% on 2008.
4. Among the top performers, sixteen countries showed triple digit growth and eleven countries showed double digit growth. Together these markets contributed more than 83% (22.6 billion impressions) of the traffic delivered throughout 2009

	Country	Y-on-Y
1	Turkey	694%
2	Germany	447%
3	Saudi Arabia	396%
4	Mexico	294%
5	Greece	286%
6	Australia	269%
7	Spain	235%
8	Canada	203%
9	Ireland	196%
10	Italy	192%
11	New Zealand	178%
12	United Kingdom	176%
13	China	119%
14	Malaysia	113%
15	Thailand	111%
16	Sweden	106%
17	France	94%
18	Norway	80%
19	United States	75%
20	Nigeria	75%
21	Indonesia	67%
22	Vietnam	54%
23	Philippines	45%
24	Argentina	33%
25	India	31%
26	Egypt	19%
27	Libyan Arab Jamahiriya	17%

5. In the fourth quarter of 2009, more than 5.8 billion advertiser banners were delivered across the entire network. This represents a Q-on-Q increase of 7% with the top 20 countries delivering 81% (4.7 billion) of all banners served.
6. Indonesia, India, United States and South Africa continued their dominance among the TOP 5 and are joined by Saudi Arabia.

- a. Indonesia remains in top position - more than 2 billion banners were served to Indonesian audiences – as advertiser campaigns increased and banners served increased by 14%.
- b. Indian remained in 2nd place although advertiser demand declined by a further 28%.
- c. South African traffic also slowed its decline in the fourth quarter and overtook USA to take 4th place.
- d. Saudi Arabia continued a year of very healthy growth with a Q4 surge of 120% in traffic.

7. Among the **Top 10**

- a. Canada rose 2 places to 6th place with a 40% growth in traffic.
- b. United Kingdom remained in 7th place as advertiser interest picked up in Q4 and slowed previous decline to 8%.
- c. Malaysia (8th) rose in ranking (previously 9th place) with 11% growth.
- d. After triple digit growth in Q3 Nigeria fell to 9th place as traffic dropped by 33%
- e. Italy ended its year of positive growth with Q4 growth of 77% and was placed 10th position.

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

- a. China (11th place) with 26% growth.
- b. Mexico (in 12th place) continued a year of positive growth with a Q4 growth of 190%.
- c. Previously in 5th place, Kenya dropped to 13th place as traffic dropped by 47% in Q4.

- d. Similarly, Norway (14th place) climbed 11 places having ended the year with 105% growth.
 - e. Noteworthy are France (16th place) and Germany (18th place) both of which continued with double digit growth.
9. More depth continues to develop in the network with 33 countries now deliver monthly traffic exceeding 10 million impressions per month. This also reflects renewed advertiser confidence as many economies regain strength.
10. Overall the Q4 figures reflect the gradual return of advertisers not just in the newly established mobile markets (Indonesia, South Africa, Malaysia) but also in markets where digital marketing is dominated by the fixed line internet (USA, Canada, United Kingdom, France and Germany). Countries like Italy and Mexico reflect fresh advertiser interest as new mobile markets grow.



Ad Banners Served : BuzzCity Mobile Internet Ad Network

Ranking		Country	Q3 '09	Q4 '09	Q-on Q Growth
Q3 '09	Q4 '09				
1	1	Indonesia	1,825,561,376	2,085,597,751	14%
2	2	India	899,350,648	643,834,263	-28%
4	3	South Africa	323,973,447	312,241,901	-4%
3	4	United States	377,966,856	301,648,341	-20%
10	5	Saudi Arabia	87,138,909	192,026,410	120%
8	6	Canada	101,525,406	141,976,372	40%
7	7	United Kingdom	115,882,169	107,093,533	-8%
9	8	Malaysia	91,782,112	102,297,063	11%
6	9	Nigeria	127,526,277	85,506,987	-33%
19	10	Italy	45,845,256	81,082,275	77%
15	11	China	63,885,882	80,544,824	26%
29	12	Mexico	26,303,316	76,250,977	190%
5	13	Kenya	139,799,367	73,427,289	-47%
25	14	Norway	33,468,232	68,448,584	105%
14	15	Thailand	69,197,039	64,837,972	-6%
17	16	France	46,569,757	63,329,271	36%
18	17	Bangladesh	46,376,948	61,632,730	33%
28	18	Germany	30,403,696	60,473,168	99%
21	19	New Zealand	42,949,472	56,641,437	32%
13	20	Egypt	70,606,163	54,057,815	-23%

Banners served on Top 20 Countries	4,566,112,328	4,712,948,963	3%
Banners served across the network	5,401,815,216	5,810,374,329	7%
Top 20 countries represent	85%	81%	of all banners served