



January 2, 2009

BuzzCity
Global Mobile
Advertising Index

Q4 2008



1. This report documents the growth of mobile internet advertising and represents inventory sold across the BuzzCity Mobile Advertising Network.
2. Notably, this report draws from the 100% fill rate Q-on-Q and represents a measure for 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 4th Quarter, just over 7.5 billion advertiser banners were delivered across the entire network. This represents a Q-on-Q growth of 40%, a slight increase from the previous quarterly growth rate (38%).
5. By 31st December 2008 the advertising network has served some 19.5 billion advertising banners in 2008.
6. The **Top 5 countries** remained unchanged with Indonesia (100%), India (10%), South Africa (-14%), United States (47%) and Kenya (-19%)
 - a. Indonesia remains in top position and yet again showed very strong growth (100%). Over the whole year some 7 billion banners were served to Indonesian audiences.
 - b. Indian usage increased (10%) reversing the previous months decline, while the decline in South African (-14%) traffic continued for the second straight quarter.
 - c. USA moved into 4th place with strong continued growth of 47% while Kenya dropped into 5th place as growth dropped dramatically to -19% (possibly due to network irregularities).

7. Among the **Top 10**, Egypt moved to 6th place (displacing Bangladesh) with 54% growth and Romania climbed to 7th place having enjoyed a 32% during the 4th quarter.
 - a. Bangladesh dropped to 8th place as usage dropped and growth slowed down to 1%.
 - b. Philippine traffic was boosted by 119% growth and was placed 9th (from 15th) followed by Libya (-2%) in tenth place.
8. In **The Next 10**, a new entrant is Venezuela with Q-on-Q growth of 54%.
9. The list also saw the return of China (243%) with Canada (102%) climbing to 17th place.
10. Malaysia (76%) climbed to 13th place and UK (52%) climbed to 14th place.
11. Absent from the list was Thailand (8%), which despite positive growth over the year, has seen its growth outpaced by other markets and is now in 21st place.
12. Namibia fell to 32nd place when traffic declined by -47%. This pattern of rapid drop in usage is increasingly obvious among the various markets and is usually preceded by an earlier rapid growth. This suggests traffic induced instabilities as networks struggle to handle more users. In Bangladesh, although mobile networks were suspended for a day during the general elections, decline in usage was already apparent before that. In the Philippines, Smart Communications launched their mobile broadband plan that adversely affected GPRS access.
13. By the end of '08, each of the five top performers was delivered at least 100 million advertising banners per month.
14. While the Top 10 performers contributed 80% of the network traffic, the network continued to grow beyond these markets; by end Dec '08, twenty



eight markets exceeded 10 million banners per month compared to 23 in Q3.

15. Year-on-year the network grew by some 300% and is best represented by the top 20 markets globally.

Banners Served on BuzzCity Mobile Advertising Network				
	Country	Dec-07	Dec-08	Y-on-Y growth
1	Indonesia	204,104,592	1,839,991,299	801%
2	India	209,107,367	258,028,900	23%
3	South Africa	94,310,197	178,450,392	89%
4	United States	39,980,741	138,209,378	246%
5	Kenya	34,220,793	44,088,737	29%
6	Egypt	6,106,628	51,281,580	740%
7	Romania	15,141,556	51,209,432	238%
8	Bangladesh	34,405,260	42,244,558	23%
9	Philippines	7,430,359	48,836,866	557%
10	Libya	126,129	19,988,826	15,748%
11	Tanzania	24,383,560	30,239,399	24%
12	China	15,619,601	25,309,906	62%
13	Malaysia	7,495,525	27,402,069	266%
14	United Kingdom	7,537,863	26,734,969	255%
15	Brunei	12,930,005	30,843,550	139%
16	Nigeria	3,830,295	23,186,597	505%
17	Canada	3,627,439	23,745,333	555%
18	Norway ¹	6,740,778	4,529,403	-33%
19	Iran	2,003,427	14,355,606	617%
20	Venezuela	6,955,440	17,169,571	147%
	Total	736,057,555	2,895,846,371	293%

¹ Contributed in large part by Opera mini whose servers are in Norway. Traffic may include other countries besides Norway. Numbers expected to reduced with re-alignment in future reports.



Position		Banners Served on BuzzCity Mobile Advertising Network								
Q3	Q4	Country	Q1	Q2	Q2 Growth	Q3	Q3 Growth	Q4	Q4 Growth	Annual Total
1	1	Indonesia	654,339,462	1,212,391,039	85%	1,786,233,512	47%	3,564,832,448	100%	7,217,796,462
2	2	India	576,761,984	669,367,309	16%	659,831,862	-1%	726,935,723	10%	2,632,896,878
3	3	South Africa	425,756,870	578,761,320	36%	540,285,545	-7%	465,312,929	-14%	2,010,116,664
5	4	United States	132,036,696	190,811,200	45%	260,972,684	37%	382,450,258	47%	966,270,839
4	5	Kenya	78,667,897	156,458,029	99%	298,695,797	91%	241,106,915	-19%	774,928,640
9	6	Egypt	26,723,169	55,405,828	107%	97,686,203	76%	150,393,150	54%	330,208,352
10	7	Romania	56,806,178	71,634,030	26%	102,573,994	43%	135,501,235	32%	366,515,438
6	8	Bangladesh	53,363,066	78,199,831	47%	133,935,781	71%	134,627,619	1%	400,126,298
15	9	Philippines	30,100,131	55,846,890	86%	52,861,990	-5%	115,524,851	119%	254,333,863
7	10	Libya	356,671	5,937,360	1565%	103,309,607	1640%	100,801,729	-2%	210,405,399
8	11	Tanzania	34,834,137	88,028,406	153%	114,348,431	30%	97,661,460	-15%	334,872,436
28	12	China	36,800,040	30,847,971	-16%	22,698,846	-26%	77,857,151	243%	168,204,008
17	13	Malaysia	19,939,737	28,860,714	45%	42,829,502	48%	75,414,933	76%	167,044,887
16	14	United Kingdom	23,396,714	24,677,176	5%	48,485,722	96%	73,601,656	52%	170,161,269
11	15	Brunei	35,443,351	63,817,433	80%	81,326,034	27%	73,466,562	-10%	254,053,381
12	16	Nigeria	21,387,161	36,215,378	69%	79,185,697	119%	70,690,190	-11%	207,478,428
20	17	Canada	15,998,534	18,122,512	13%	32,165,657	77%	65,115,586	102%	131,402,290
42	18	Norway	21,884,405	5,961,626	-73%	12,190,908	104%	46,033,384	278%	86,070,323
13	19	Iran	15,170,151	34,214,737	126%	76,236,882	123%	42,927,305	-44%	168,549,077
24	20	Venezuela	12,414,191	20,271,347	63%	27,620,627	36%	42,527,920	54%	102,834,086
Total			2,272,180,545	3,425,830,136	51%	4,573,475,281	33%	6,682,783,004	46%	16,954,269,018
Network Total			2,623,896,536	3,902,303,798		5,398,925,491		7,546,469,278		19,471,595,103
Network Growth				49%		38%		40%		