



January 2011

BuzzCity
Global Mobile
Advertising Index

Q4 2010



The Year in Review

1. 2010 saw a huge growth of the mobile internet as more users took advantage of cheaper data rates and much improved handsets.
2. During this period, the BuzzCity ad network grew by more than 90% compared to '09 as advertiser campaigns also increased.
3. Some 2,500 advertisers ran campaigns and increased their expenditure in several key markets, notably :-

	Q4 Ad Revenue	Y-on-Y Growth	Average CPC (Dec 10) USD
1	South Africa	29%	\$0.19
2	Indonesia	4%	\$0.03
3	Malaysia	218%	\$0.20
4	India	233%	\$0.01
5	Thailand	482%	\$0.17
6	Kenya	739%	\$0.03
7	UK	24%	\$0.11
8	US	64%	\$0.02
9	Vietnam	4971%	\$0.03
10	Argentina	657%	\$0.14

4. 2010 also saw the continued resurgence of mobile content and the majority of advertisers came from the mobile VAS industry.
5. The network also saw an increasing number of campaigns from travel & hospitality sectors, consumer and financial products.

Most Used Phones (Dec '10)	
Nokia	42.2%
Samsung	10.3%
Sony Ericsson	9.4%
Apple	7.2%
BlackBerry	4.0%
LG	3.9%
HTC	3.9%
Others	19.1%

6. By the end of the year the influx of new users also influenced the pattern of device usage. A sampling of the top 20 or so markets (Figure 1) reveal that by Dec 2010 :-
- a. Nokia (42%) remained the most prevalent surfing device, followed by Samsung (10.3%) and Sony Ericsson (9.4%)
 - b. Apple (7.2%) and Blackberry (4%) made significant impact although as the year unfolded; Apple seemed to gain preference among users as Blackberry users declined.
 - c. Notable among the manufacturers are HTC as its usage steadily increased from 2010. Also noteworthy is that by the end of 2010, the assortment of manufacturers labeled "Others" had grown to 19%. Of this, at least 5% comprise white label phones.



The Year Ahead

Advertisers planning more campaigns in 2011 should also look out for the following:-

1. Price wars will continue to drive usage in many countries (India, Kenya, Nigeria and South Africa), and
2. Mobile content (applications and services) continues to be in high demand and in many markets the undersupply (of publishers and content) may result in inflated costs of mobile internet advertising.
3. Smartphone usage will increase in all markets but contributions from 'white box' manufacturers, particularly in emerging markets will change the landscape.
4. Growth and demand for mobile internet advertising continues to increase in US and Western European markets as these economies recover from recession.



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. Detailed network statistics and analytics are available in monthly updates through the [campaign planner](#) on the BuzzCity site.
3. In this report we track the growth of the network during Q4 2010 across more than 200 countries around the world.
4. In the fourth quarter of 2010, more than **16.8 billion advertiser banners** were delivered across the entire network. This represents a **Q-on-Q increase of 12% with the top 20 countries delivering 80% of all banners served.**
5. For the whole of 2010, a total of 52.8 billion ad banners were delivered across the network – a growth of 93% compared to 2009.
6. India, Indonesia, United States and South Africa and Kenya continued their dominance among the **Top Five**
 - a. India moved to first place in Q4 as strong advertiser demand resulted in more than 4 billion ad banners delivered to Indian audiences. Growth softened to 9% after three consecutive quarters of double digit growth for India. Throughout 2010, some 11 billion ad banners were delivered, an increase of more than 217% compared to 2010.
 - b. Indonesia dropped to 2nd place as traffic fell by 19% against the last quarter and 3 billion banners were delivered to Indonesian

audiences. Throughout 2010 more than 13.9 billion ad banners were delivered – this reflects a growth of 15% in overall Indonesian traffic.

- c. US traffic increased by 16% with more than 1.1 billion banners served placing the US in third place. The US saw double digit growth in all four quarters. Overall, US traffic saw a 97% growth compared to 2009.
- d. South Africa remained in 4th place as traffic grew by 26% - more than 880 million banners were delivered in Q4. South Africa continued four quarters of double digit growth and completed the year with 66% overall growth compared to 2010.
- e. In 5th place is Kenya (522 million impressions) despite slower growth (3%) in the fourth quarter, following six months of triple digit growth. Compared to 2010, the Kenyan audience grew by 245%.

7. Among the **Top 10**

- a. Saudi Arabia rose in ranking to 6th place as traffic grew by 75% and advertiser interest drove the number of impressions served to Saudi audiences to 520 million impressions in Q4.
- b. In 7th place is Vietnam as traffic saw 38% growth and more than 404 million ads were served.
- c. Korea continued its remarkable rise from 62nd place in Q1 to end the year in 8th place. In Q4 more than 370 million ad banners were delivered to Korean audiences – a growth of more than 250% from the last quarter.
- d. Nigeria rose to 9th place as traffic grew by almost 200% in Q4 (364 million).

- e. Libya fell two places to 10th position as growth softened (2%) in the last quarter of 2010. Compared to 2009, annual Libyan traffic grew by 176%.
8. Among **The Next 10** countries noted for sustained growth are:
- a. Rankings changed dramatically for many as growth surged at different rates between markets. This flux in rankings is likely to continue as more growth is expected globally.
 - b. Malaysia fell to 11th place despite a 31% growth in Q4 with 253 million banners served.
 - c. The UK fell to 12th place as advertiser demand softened in Q4, despite an overall growth of 91% in 2010.
 - d. In 13th place is Mexico which registered growth of 61% in Q4.
 - e. Germany rose to 14th place with a 174% increase in traffic in Q4.
 - f. Despite a 34% increase in traffic, China fell to 15th place. Similarly, Turkey, Bangladesh and Thailand fell despite double digit growth in Q4.
 - g. New entrants to the Top 20 charts are United Arab Emirates (16th place) and Brazil (20th place)
9. During this reporting quarter mobile internet usage gained more depth as total of 67 markets (previously 54) each market delivered monthly traffic of more than 10 million impressions per month.



Ad Banners Served Q4 2010 : BuzzCity Mobile Internet Ad Network							
Rank Q1	Rank Q2	Rank Q3	Rank Q4	Country	Q4 10	Q4 Growth	Annual Growth
2	2	2	1	India	4,024,179,385	9%	217%
1	1	1	2	Indonesia	2,992,151,427	-19%	15%
3	3	3	3	United States	1,137,621,426	16%	97%
4	4	4	4	South Africa	884,405,024	26%	66%
21	6	5	5	Kenya	522,450,554	3%	245%
7	9	6	6	Saudi Arabia	519,770,665	75%	170%
18	5	7	7	Vietnam	404,036,815	38%	994%
62	35	18	8	Korea, Republic of	372,269,666	254%	17099%
9	13	17	9	Nigeria	331,860,161	198%	99%
24	21	8	10	Libyan Arab Jamahiriya	259,391,241	2%	176%
10	12	10	11	Malaysia	253,113,015	31%	103%
6	8	9	12	United Kingdom	235,429,708	-2%	91%
14	19	13	13	Mexico	218,849,238	61%	322%
13	24	35	14	Germany	217,500,752	174%	220%
30	32	12	15	China	194,862,491	34%	20%
34	41	21	16	United Arab Emirates	189,045,337	91%	605%
27	33	20	17	Turkey	183,003,151	82%	395%
12	14	14	18	Bangladesh	177,520,133	32%	98%
22	23	15	19	Thailand	167,526,526	31%	69%
43	52	38	20	Brazil	156,043,089	101%	793%

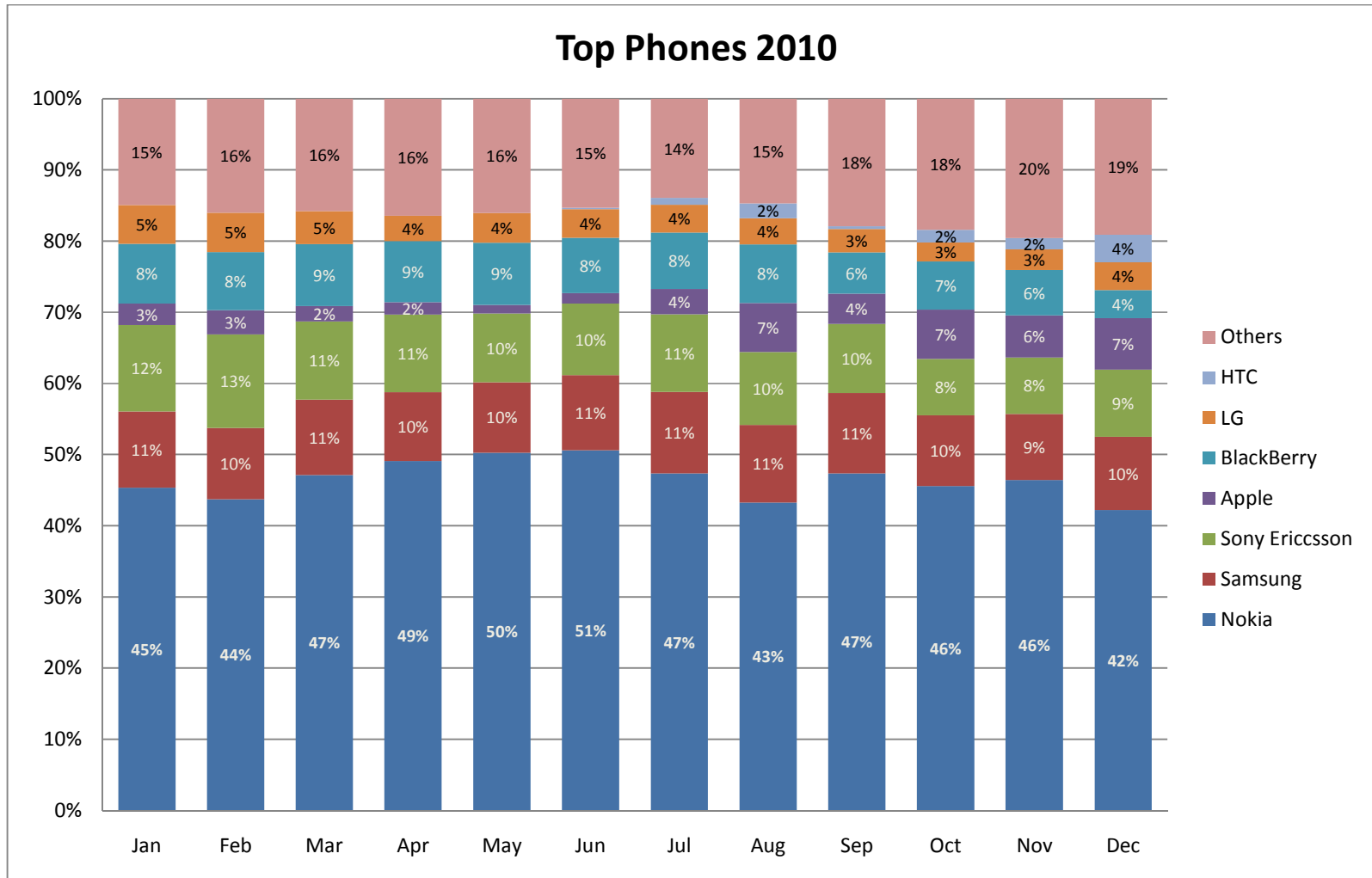
More than 16.8 billion advertiser banners were delivered across the entire network with the top 20 countries delivering 80% of all banners served.

11. Also noteworthy is the growth of Central and South American markets particularly Mexico, Brazil, Argentina and Uruguay.

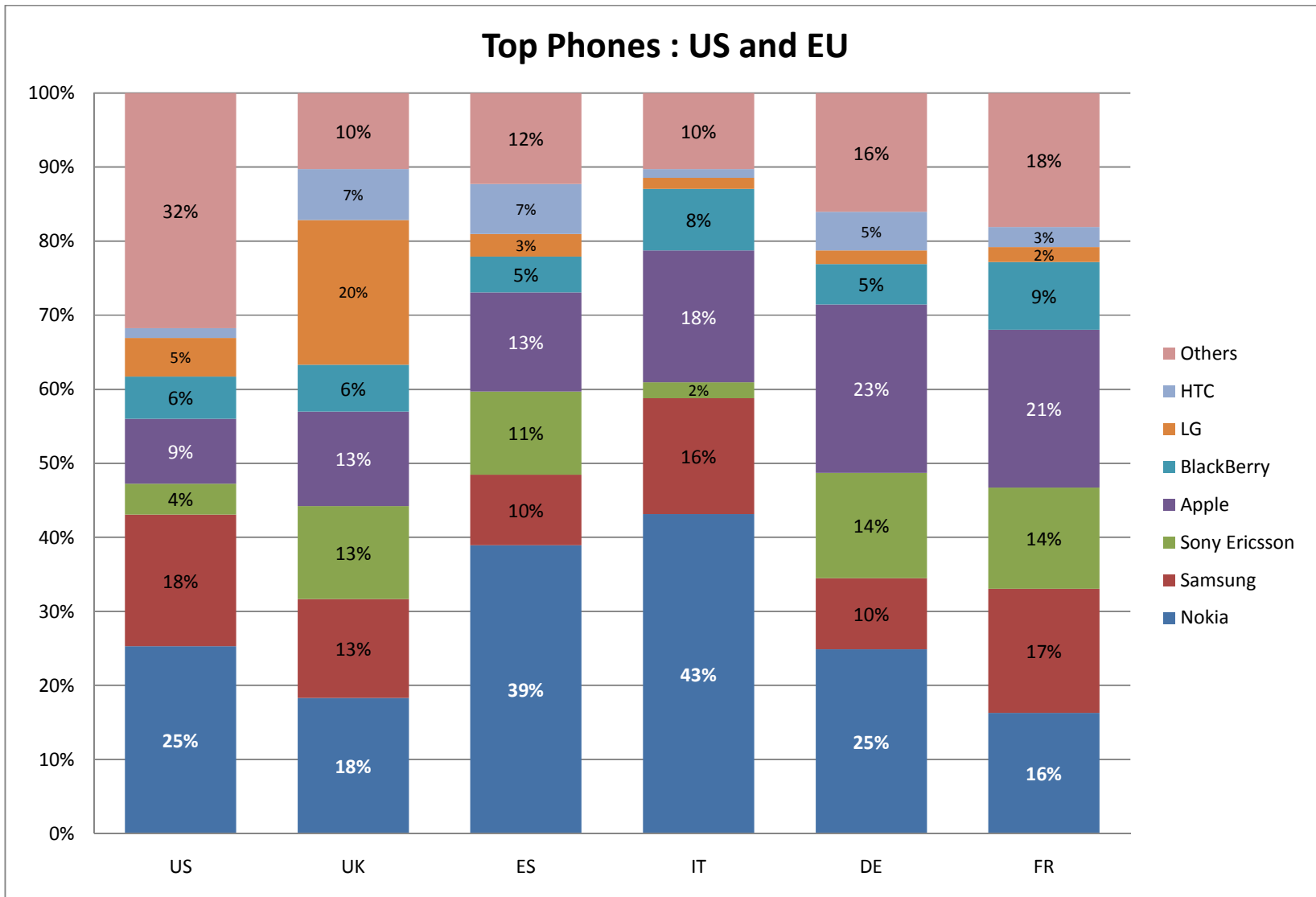
Country	Annual Traffic 2010	Annual Growth
Mexico	554,362,162	322%
Brazil	277,075,427	793%
Argentina	377,136,424	365%
Uruguay	124,649,784	325%
Chile	95,928,203	380%
Ecuador	37,255,790	426%

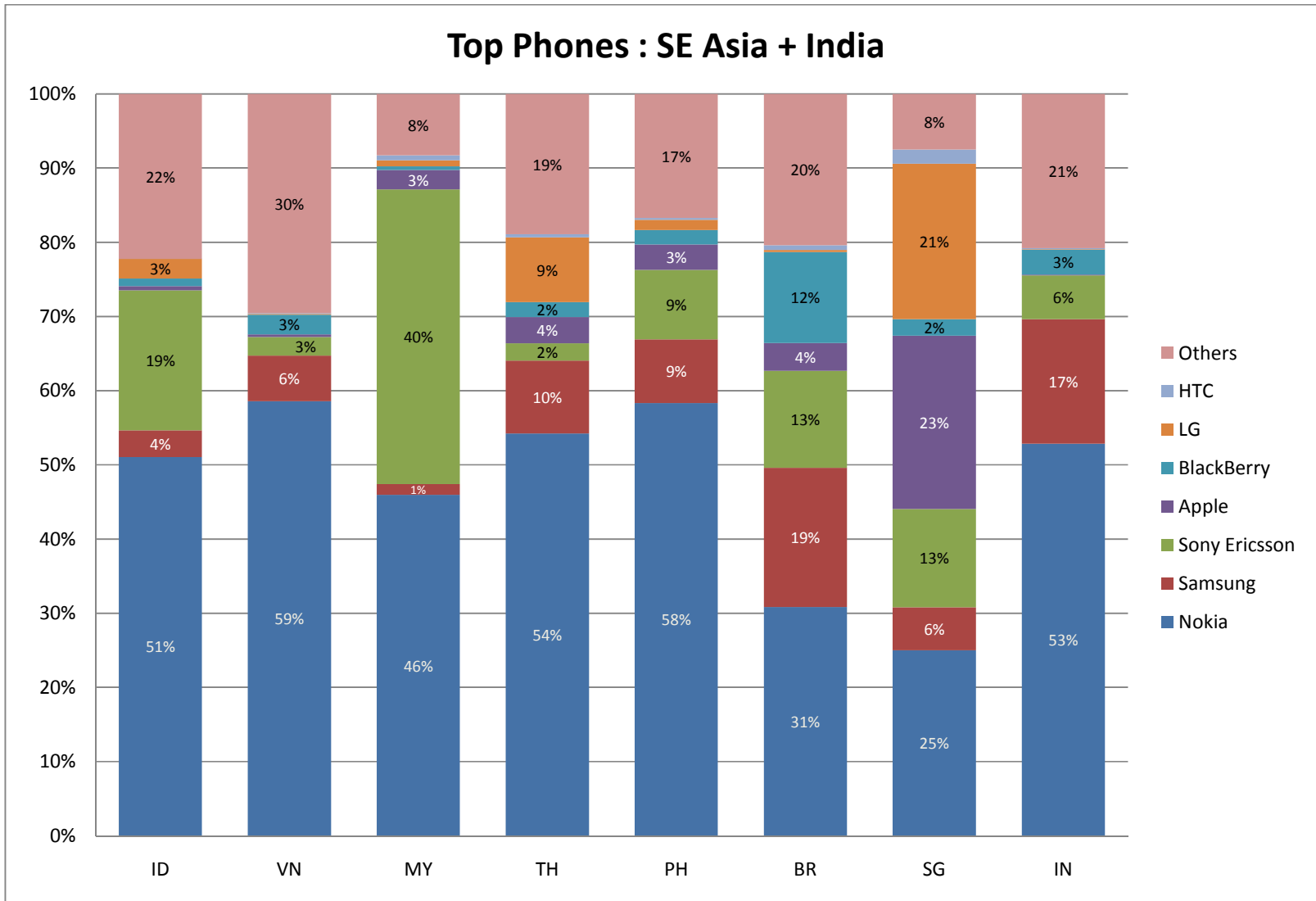


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(Figure 1)





Top Phones : Africa & Middle East

