

# Q3 2013

## Global AdMetrics Report



**adfonic**   
The smarter buying platform

# Introduction

## About Global AdMetrics

This is Adfonic's Global AdMetrics Report for Q3 2013.

It provides actionable insights that help advertisers understand what drives campaign performance.

The Adfonic Global AdMetrics Report is based on data drawn from Adfonic's buying platform during the quarter.

## Q3 2013 Highlights

**Tablets grow, while the iPad grows even more.** Tablets accounted for 28% of all mobile ad impressions over Q3 2013, which was double their share in Q4 2012. Within the growing tablet format, Apple's iPad, already the dominant device, further established its position by gaining share.

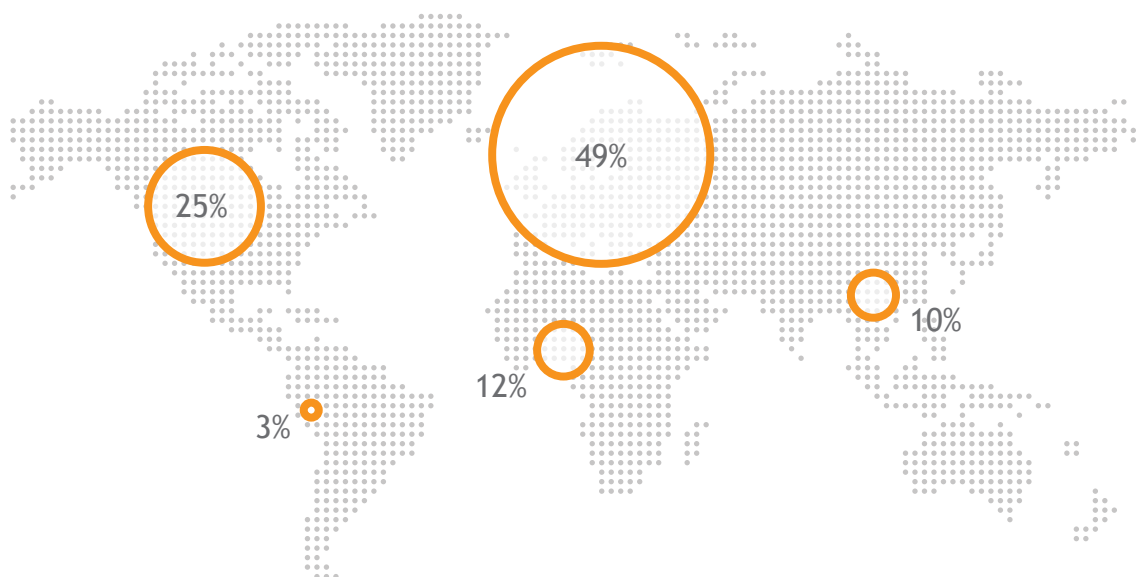
**Apple pulls away from the pack.** Apple remained the strongest manufacturer by volume, with 63% of all global ad impressions. Furthermore, Apple also increased its share of global impressions against the 'long tail' of manufacturers - that is, all mobile device manufacturers other than Apple and Samsung.

**More premium inventory available through Real-time Bidding.** We saw increasing volumes of supply come through premium publications traded through the RTB exchanges, accessed via our mobile DSP, Madison. Total premium supply grew from 342 million ad requests in Q4 2012 to 582 million in Q1 2013, then 949 million in Q2, then 1.9 billion in Q3. At this rate of growth, we predict that Q4 2013 could see nearly 4.5 billion ad requests coming from RTB-enabled premium inventory.

## Victor Malachard

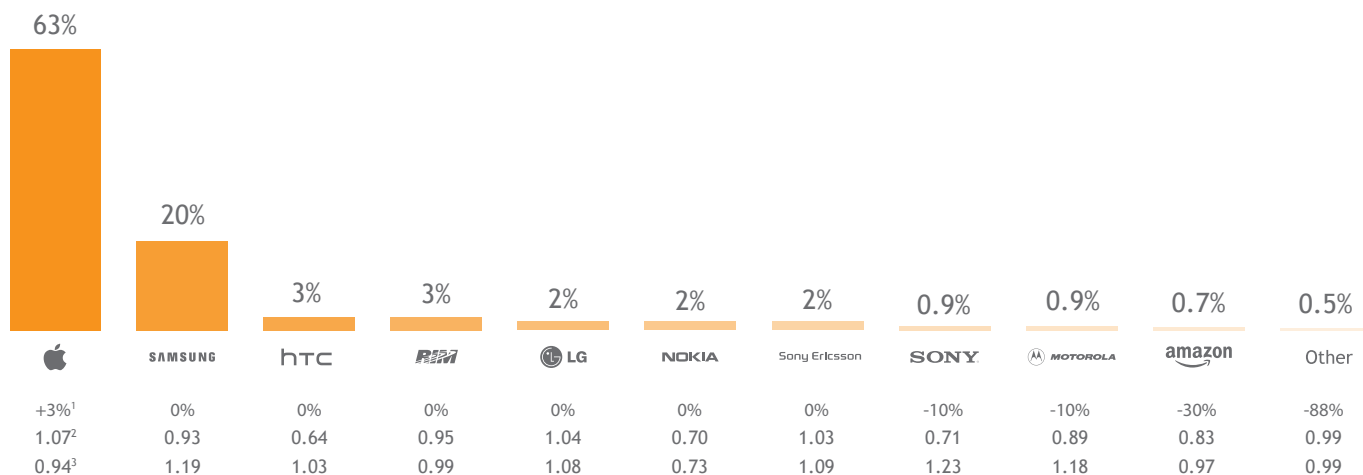
CEO & Co-founder

## Global share of impressions



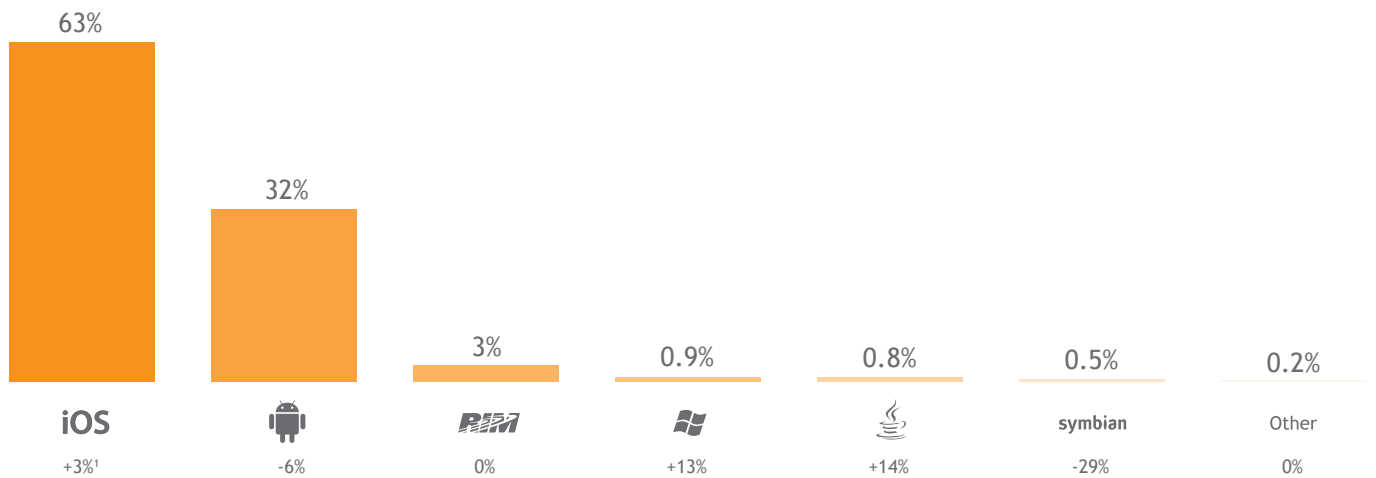
For Q3 2013 we looked at mobile ad impressions rather than requests to get a picture of demand across our global platform. We saw a major change in the profile of territories across our global platform, with Europe accounting for the most ad impressions.

## Manufacturer share of impressions



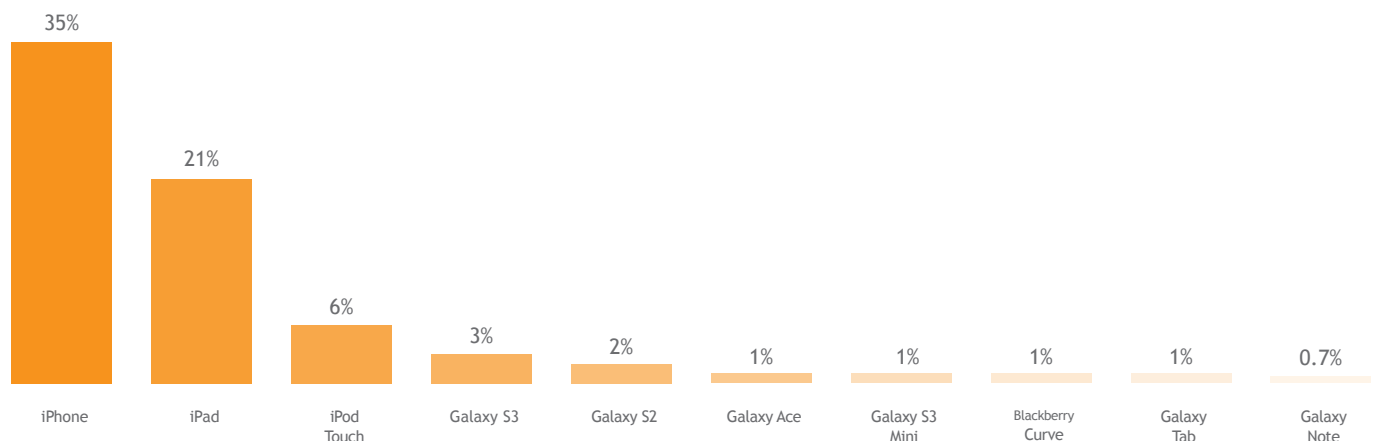
In terms of impressions, Apple devices were much the strongest, but with only a small increase on the previous quarter. Samsung remained flat, and the rest of the 'long tail' of manufacturers also remained flat or lost a significant amount of impression share. We saw this earlier in the year in our piece entitled "What the death of the mobile long-tail means for agencies" in MediaWeek's Blogged section (see <http://bit.ly/mediaweekadfonic>). Apple devices also yielded the strongest CTR figures for advertisers, while publishers benefitted most from the high eCPM figures seen with Samsung and Sony devices.

## Top platforms by impressions



Apple's iOS and Google's Android platforms continued to dominate in Q3 2013. Together they accounted for 95% of all ad impressions globally. RIM was the third strongest manufacturer by impressions but this was quite some distance behind, at 3%. Of the other platforms, Symbian lost the greatest proportion of impressions, down nearly a third on Q2.

## Top devices by impressions



The top ten device mix for Q2 2013 was very similar to previous quarters, with Apple devices occupying the top positions. The iPhone had the greatest share of ad impressions at 35% while the iPad gained the greatest share, up 62% from Q2. This ties with other statistics such as tablets increasing their share of impressions (see Tablet v smartphone share of impressions), and further confirmed Apple's dominance, taking the top three positions overall. The only non-Android, non-iOS device in the top ten was the BlackBerry Curve.

## Top mobile devices

	Model	Brand	Platform	Share of Impressions	% Change	CTR Index	eCPM Index
1	iPhone	Apple	iOS	49.0%	-5.0%	1.06	1.08
2	iPod Touch	Apple	iOS	8.6%	2.0%	0.80	0.47
3	Galaxy S3	Samsung	Android	4.8%	-3.0%	0.87	1.17
4	Galaxy S2	Samsung	Android	3.1%	-12.0%	0.97	1.18
5	Galaxy S4 LTE	Samsung	Android	1.8%	332.0%	0.68	1.05
6	Galaxy S3 mini	Samsung	Android	1.8%	38.0%	1.30	1.24
7	Galaxy Ace	Samsung	Android	1.6%	-10.0%	1.41	1.17
8	Curve	BlackBerry	RIM (BlackBerry)	1.0%	21.0%	1.30	1.25
9	Galaxy Note 2	Samsung	Android	0.9%	24.0%	0.87	0.96
10	Galaxy S3 LTE	Samsung	Android	0.8%	37.0%	0.65	1.02
	Other			26.6%			

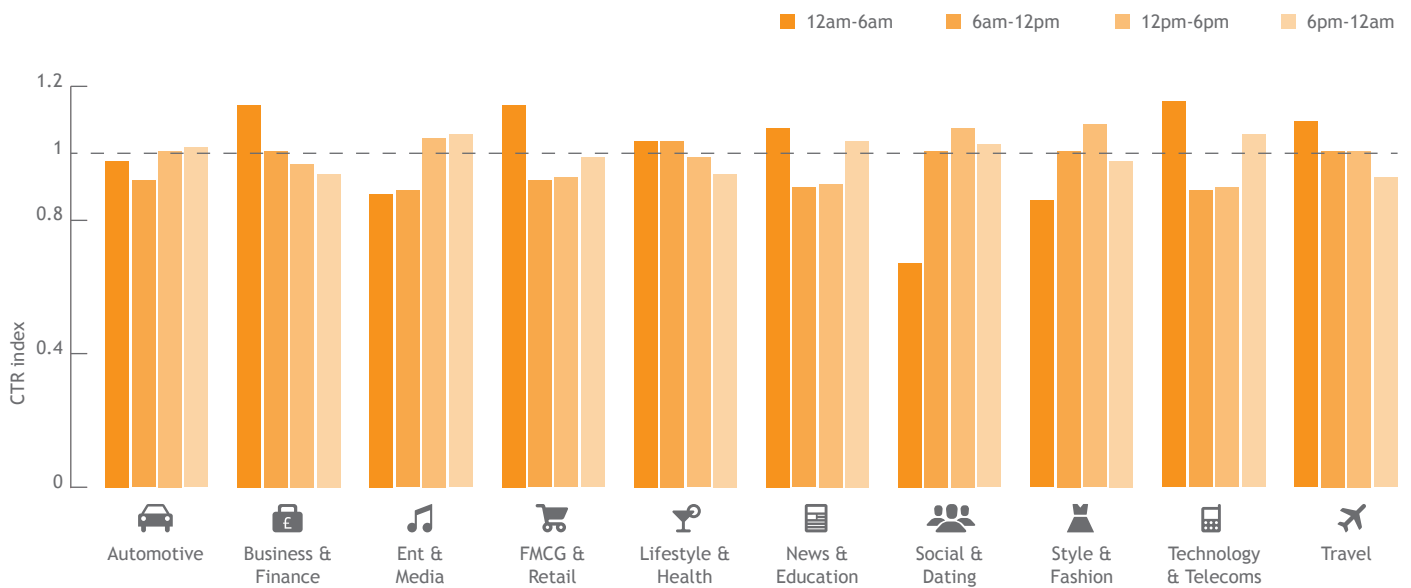
The iPhone was the clear leader by share of mobile device ad impressions, accumulating nearly half of all global impressions throughout Q3 2013. However, overall Samsung mobile devices tended to yield the strongest CTR and eCPM figures.

## Top tablets

	Model	Brand	Platform	Share of Impressions	% Change	CTR Index	eCPM Index
1	iPad	Apple	iOS	76.0%	13.0%	1.14	0.93
2	Galaxy Tab 2	Samsung	Android	3.9%	15.0%	0.35	0.95
3	Galaxy Tab 7	Samsung	Android	2.2%	-18.0%	0.61	1.43
4	Nexus 7	LG Electronics	Android	1.8%	-31.0%	0.37	1.51
5	Kindle Fire HD	Amazon	Android	1.2%	-31.0%	0.75	1.65
6	Galaxy Tab 2 7.0	Samsung	Android	1.1%	-52.0%	0.74	1.24
7	Kindle Fire	Amazon	Android	1.0%	-44.0%	0.82	1.39
8	Galaxy Tab 2 10 inch	Samsung	Android	1.0%	-33.0%	0.49	1.19
9	Galaxy Note	Samsung	Android	0.9%	-1.0%	0.30	0.92
10	Iconia Tab	Acer	Android	0.5%	20.0%	0.50	1.27
	Other			10.4%			

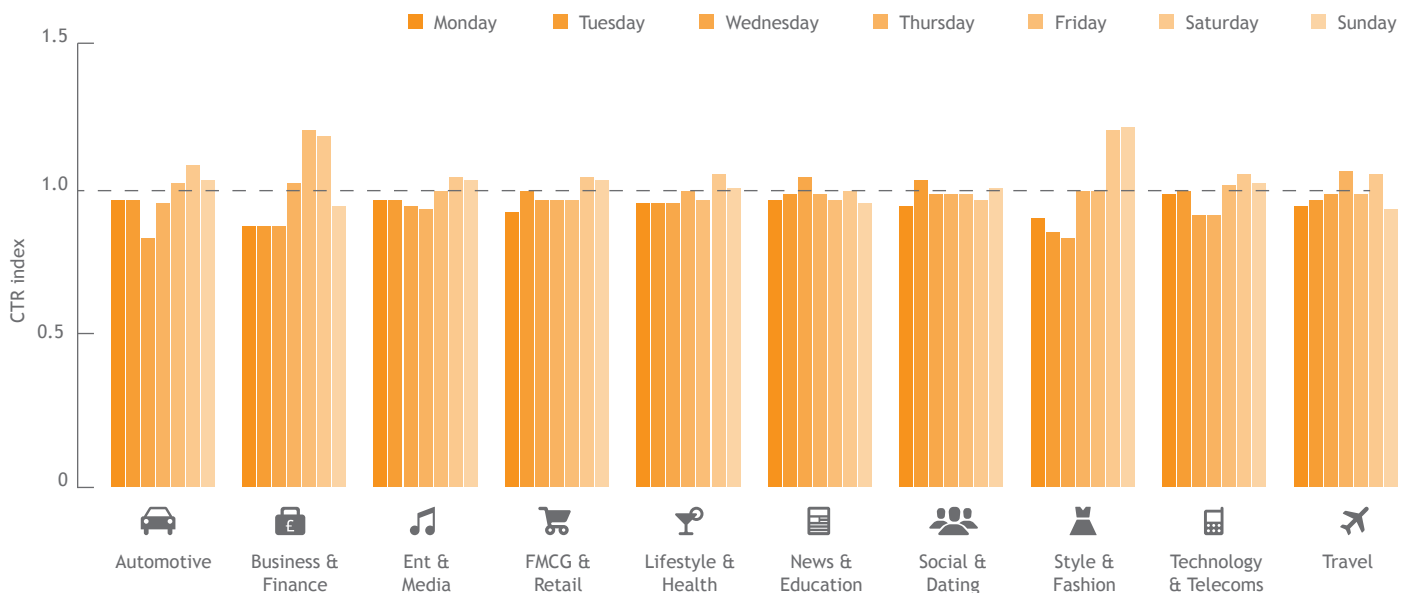
As with the iPhone, Apple's iPad was by a distance the leading performer in terms of CTR index and share of impressions, and increased this share over the previous quarter by 13%, a gain second only to the Galaxy Tab 2. The majority of tablets were especially attractive to publishers with eCPM indexes well over the average for the quarter. Unlike the top mobile devices table, there were no platforms other than Android and iOS in the tablets top ten.

## Vertical trends by time of day



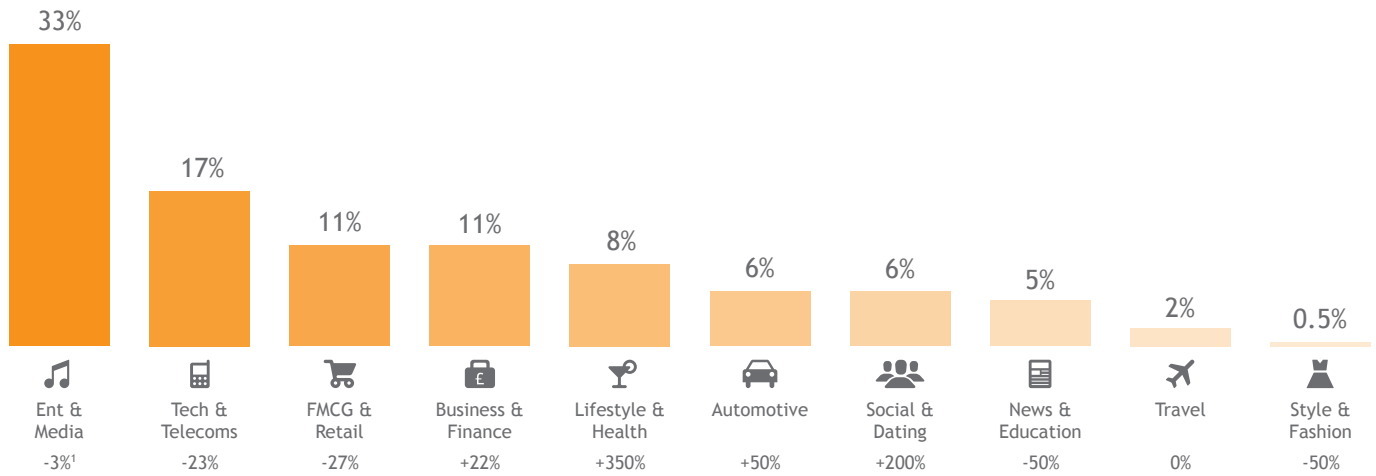
Q3 2013 saw a mix of CTR performance by time of day. There were three main profiles: strong CTR performance in the morning for people interested in Business & Finance, Lifestyle & Health and Travel; CTR performance that increased as the day progressed and people socialised or surfed more (Entertainment & Media, Social & Dating, Style & Fashion); and CTR performance that was strongest at each end of the day as people tuned in for the earliest and latest news (FMCG & Retail, News & Education, Technology & Telecoms).

## Vertical trends by day of week



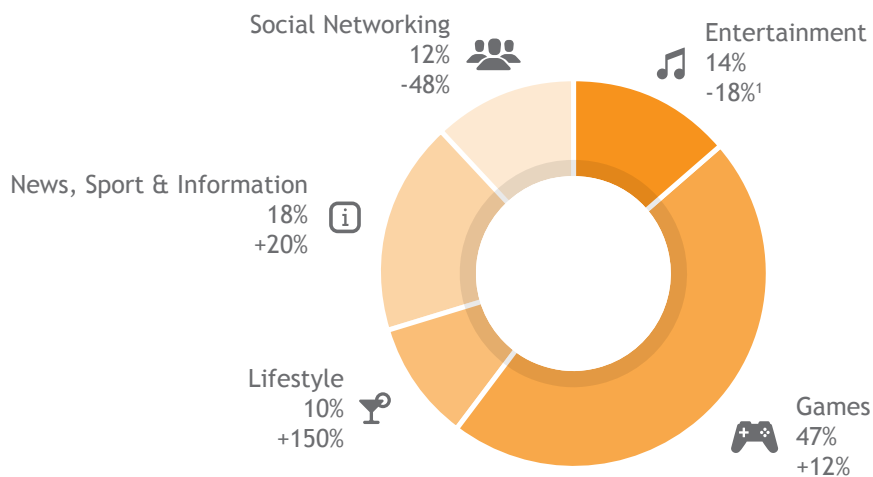
The two most notable vertical performers were Style & Fashion over the weekend, and Business & Finance on Friday and Saturday. The weekend is clearly for browsing the lifestyle sites and apps, while the close of the week and start of the weekend are for those managing their finances.

## Advertiser vertical spend by impressions



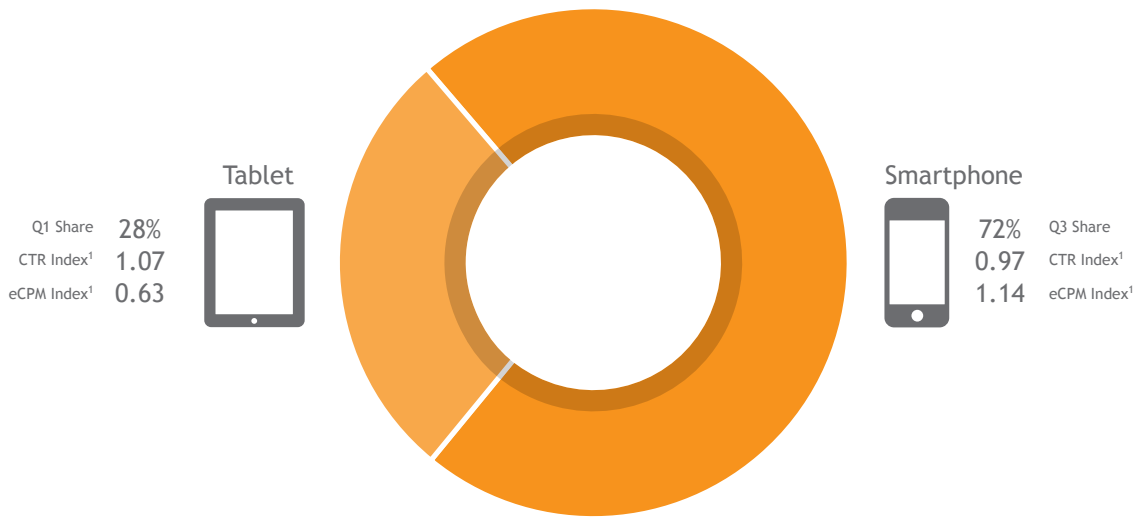
The Entertainment & Media vertical continued to dominate advertiser spend, reflecting a trend spotted by the IAB in its UK Digital AdSpend Study earlier this year. Lifestyle and Health were extremely strong performers with 350% change in spend from Q2, closely followed by Social & Dating with twice the spend from the previous quarter.

## Publisher channel mix by impressions



The Gaming sector continued to dominate. By Q3 2013, the Games channel accounted for nearly half of all impressions, gaining an impressive 12% of share from Q2. The channel with the greatest increase from Q2 was Lifestyle.

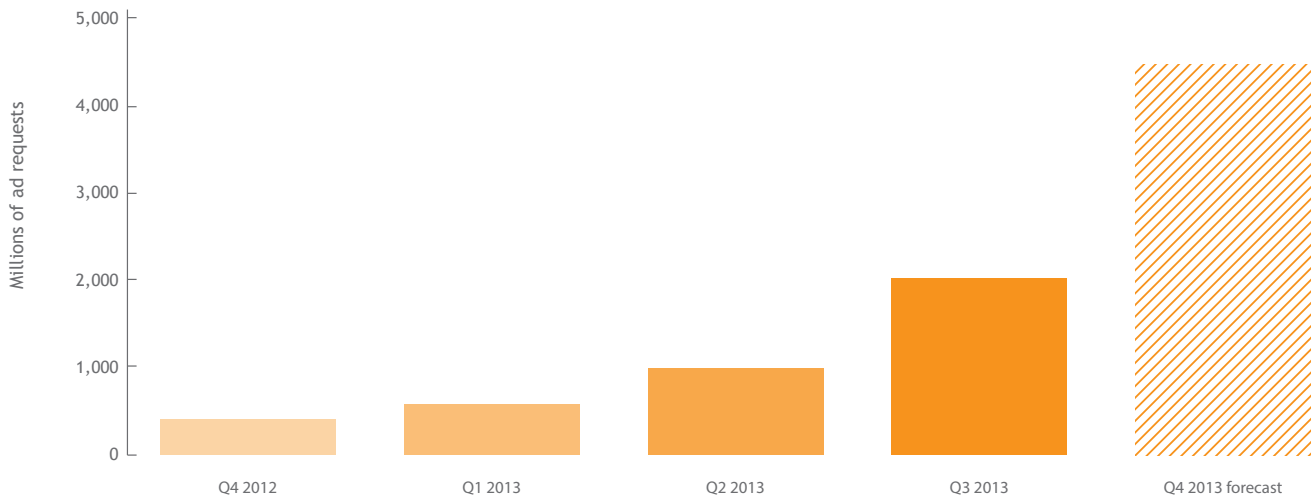
## Tablet v smartphone requests



At the tail end of 2012 we noted that tablet devices were gaining in global share. This continued throughout 2013, with tablets accounting for 19% of all ad impressions in Q2, and 28% in Q3, representing an increase in share of 47% .

Smartphones tended to benefit publishers with higher eCPMs, while advertisers gained most value from tablets with higher CTRs.

## Focus on premium ad requests through RTB



We saw increasing volumes of supply come through premium publications traded through the RTB exchanges, accessed via Madison, our mobile DSP. This is because, alongside their premium deals, they made part of their inventory available on the exchanges, to be sold at the most competitive price as established by the market.

The chart below shows premium supply availability via RTB for the past four quarters, rising from 342 million requests in Q1 2012, to nearly 2 billion in Q3 2012. At this rate of growth, we forecast that Q4 2013 could see nearly 4.5 billion premium publication ad requests available through our single buying point.

Index values: 1 is average for the region, <1 is below average, >1 is above average