Q2


# 2012

# Global AdMetrics Report

adfonic

# Global AdMetrics Report – Q2 2012

## About the Adfonic report

This is the second of Adfonic's quarterly Global AdMetrics Reports, for Q2 2012.

It builds on Adfonic's debut report for Q1 2012, providing more actionable insights that help advertisers and publishers understand what drives campaign performance and effective inventory monetization.

The Adfonic reports are based on tens of billions of ad requests processed monthly by the Adfonic marketplace. The Q2 2012 report draws from analysis of thousands of mobile advertising campaigns, spanning almost fifteen thousand mobile sites and apps.

## Highlights

- **Android overtakes iOS to become the most popular platform for mobile advertisers.** For the first time Adfonic's global marketplace shows that Android increases its share from 38% in Q1 to 46% in Q2, while iOS declines from 45% in Q1 to 34% in Q2.

- **There are 'sweet spot' combinations of advertiser campaign verticals and publisher inventory channels.** Some combinations produce exceptionally high clickthrough rates (CTRs) and effective earnings per thousand impressions (eCPMs). For example, news sites that show ads for style and fashion can increase eCPMs eightfold.

- **Gender targeting drives improved performance.** Gender-targeted campaigns are far more likely to deliver above-average CTRs. For example, at the global level, there is a 164% uplift in tech and telecoms campaigns that are male targeted.

## Structure of this report

The first section summarizes key metrics, with insight into our performance across geographies and platforms, and our diverse mix of publisher channels.

The second section focuses on key trends, with insights into CTRs and eCPMs across platforms, channels and geographies.

The third section highlights advertising volume, performance, and targeting successes for industry verticals.

Finally, we give insights into demographics and the impact of gender targeting on campaign effectiveness.

Paul Childs

Chief Marketing Officer

adfonic

# Contents



**Note:** Percentage data continued in this report is rounded and may not aggregate to 100 in all cases.

# Overview

## Advertiser Verticals

- Entertainment & Media
- Technology & Telecoms
- Business & Finance
- News & Education
- Social & Dating
- FMCG & Retail
- Automotive
- Travel
- Lifestyle & Health
- Style & Fashion
- Legal & CSR

## Publisher Channels

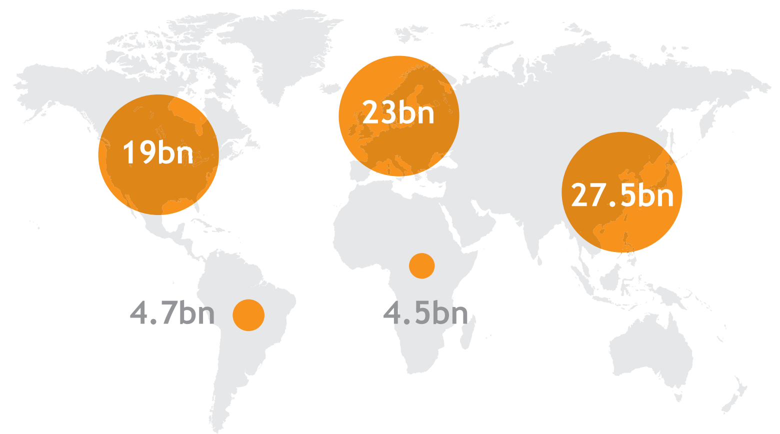
- Entertainment
- Games
- Lifestyle
- News, Sport & Information
- Social Networking

## Demographics

- Male
- Female

# Adfonic network Q2 at a glance

## Global reach: 79bn ad requests (+15%)



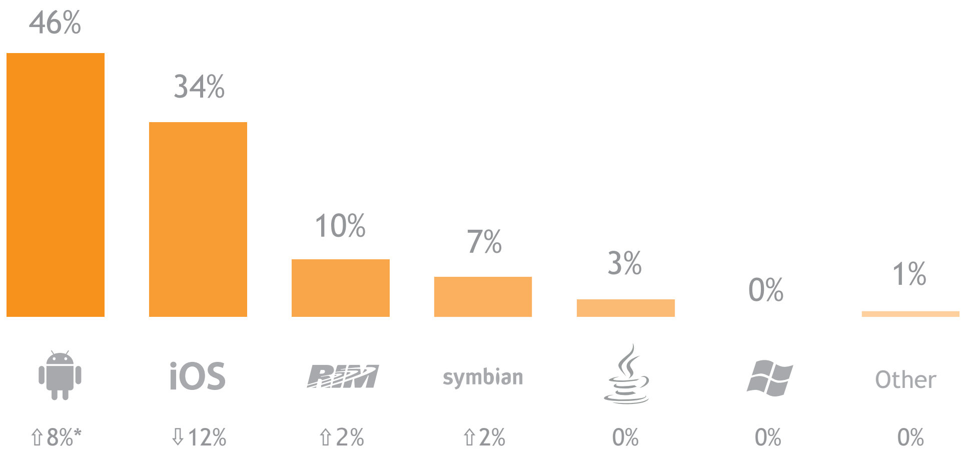

Globally, Adfonic's total ad requests increase 15% quarter on quarter, with 8,256 active campaigns in Q2.

Europe experiences the strongest growth, currently standing at 23 billion ad requests, a change of 34% quarter on quarter that enables it to surpass North America for the first time.

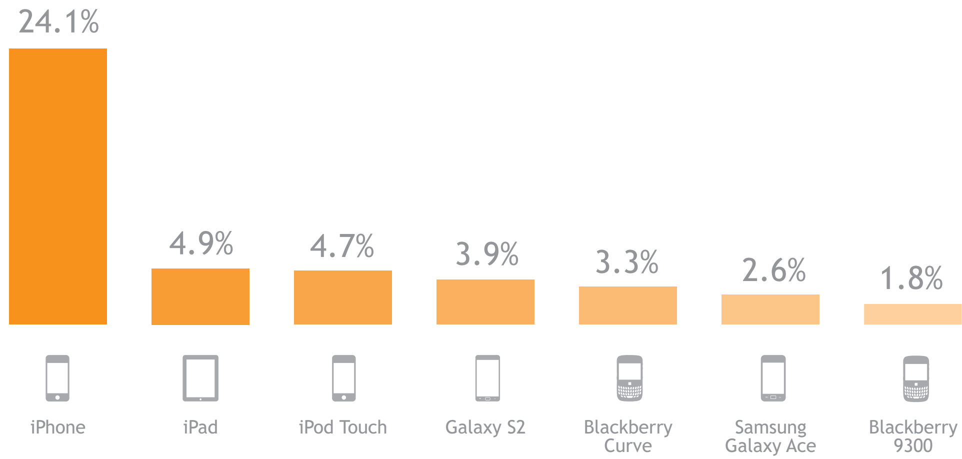
Globally, the Android platform continues to surge ahead, surpassing iOS for market share and ad impressions.

Apple's iPhone remains the most popular device. While the large Android market is segmented across a large number of brands and models, Samsung leads with four of the top 10 devices.

## Platform distribution†



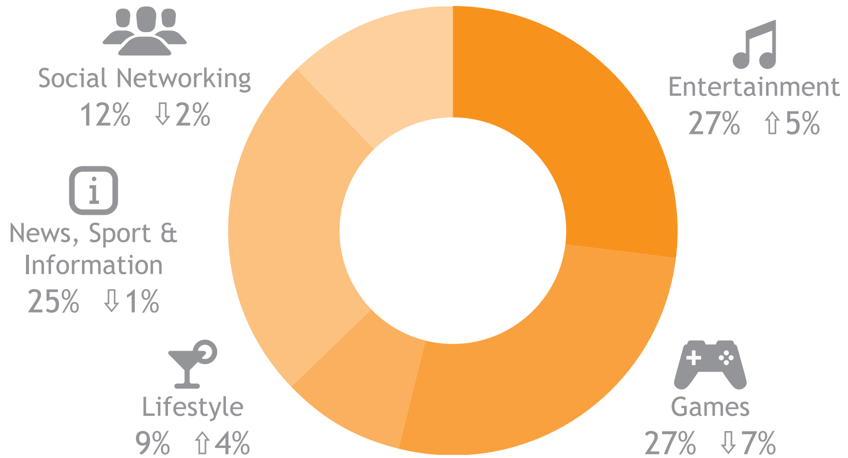

## Top devices†



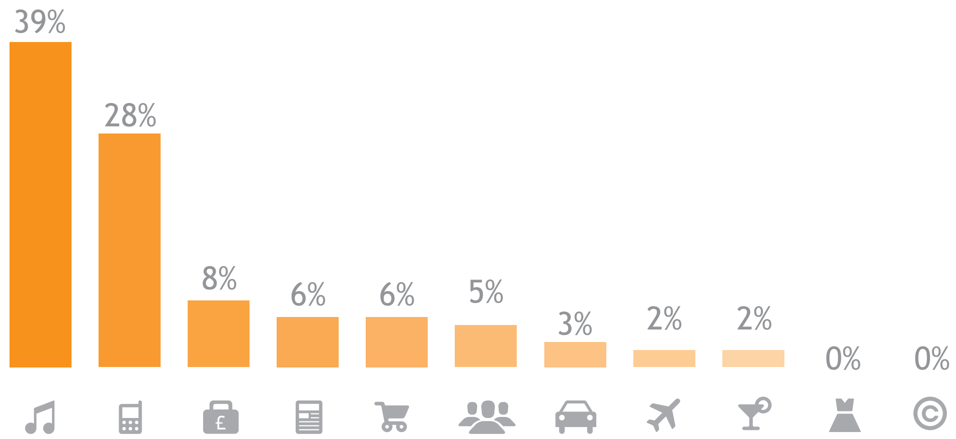

† Based on impressions | * Q1 - Q2 Change

# Adfonic network at a glance (continued)

## Publisher channels†



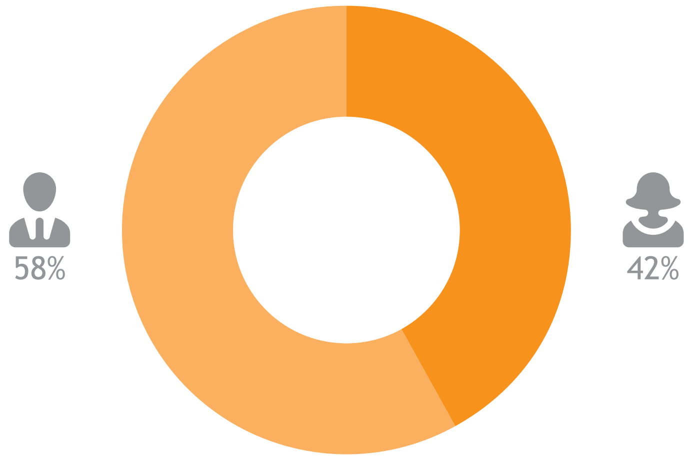

## Advertising verticals††



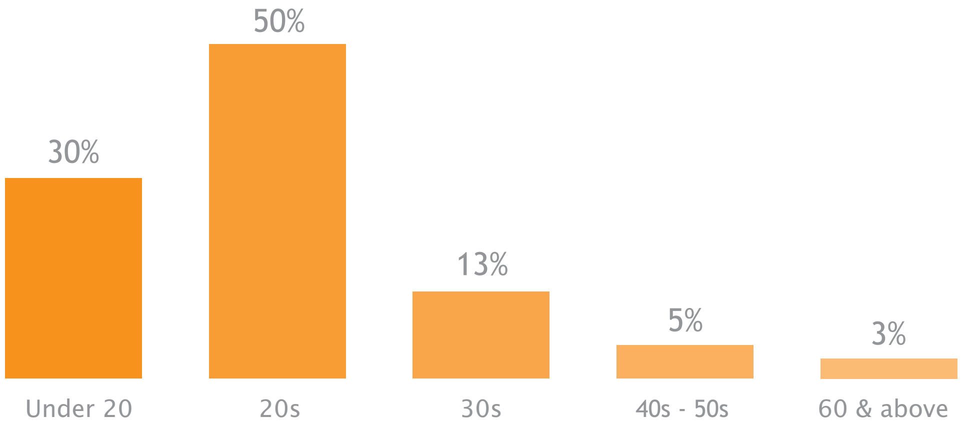
# Adfonic network at a glance (continued)

There is a significant male bias in Adfonic's North American, European and Asian markets, accounting for 58% of ad requests on iOS and Android. However, the global gender split is almost equal. The 20-29 year-old age group accounts for 50% of all consumers.

## Gender mix†




## Age mix

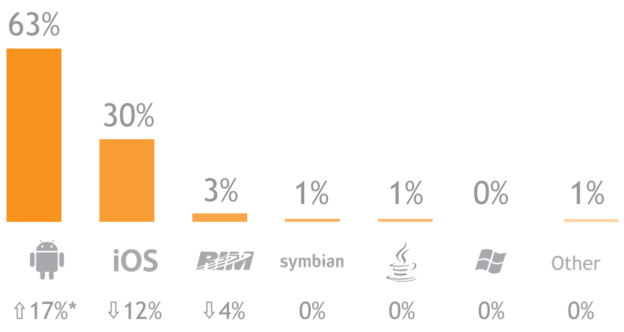



† North America, Europe, Android & iOS | See section title page for key

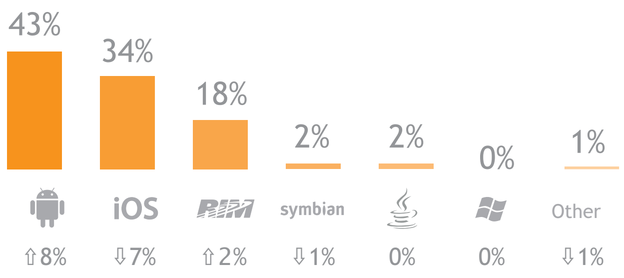
# Platform mix per region

Android gains market share in both North American and Europe, with 63% and 43% of all ad impressions respectively.

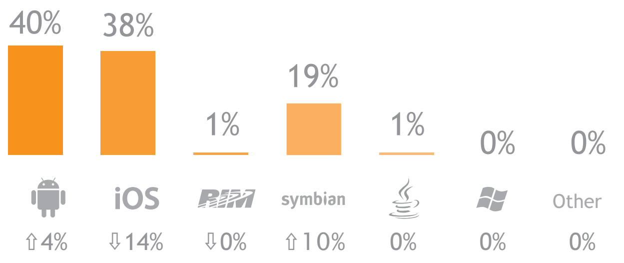
## North America



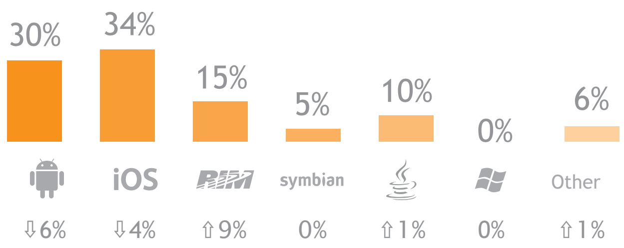

## Europe



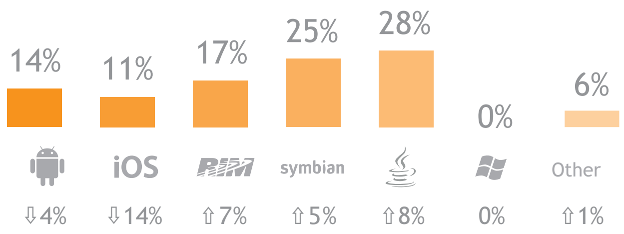

## Asia




## South America




## Africa

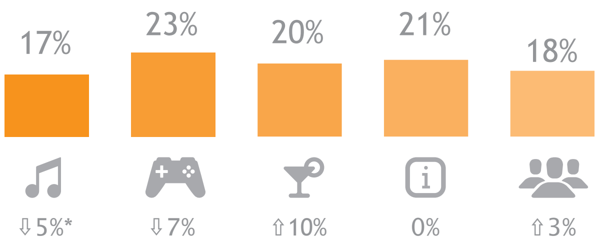



* Q1 - Q2 Change

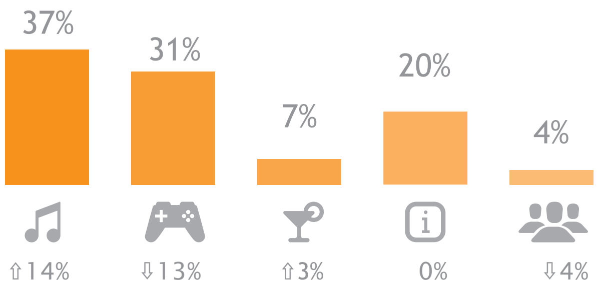
# Balanced channel mix

Ad requests are well distributed across channels, in particular in the North American market, where each channel accounts for at least 17%.

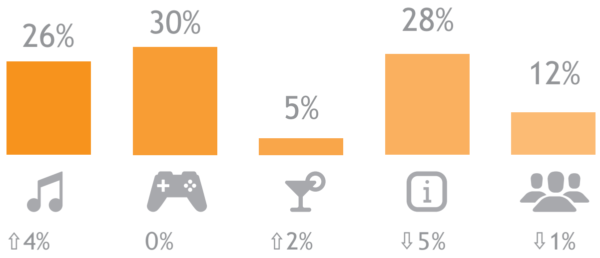
## North America



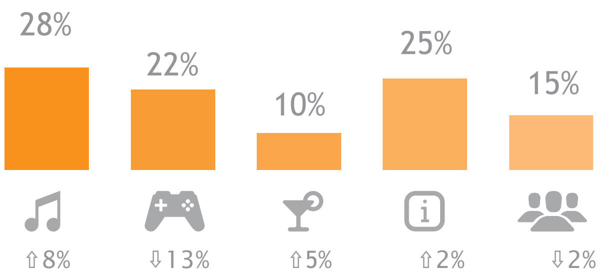

## Europe



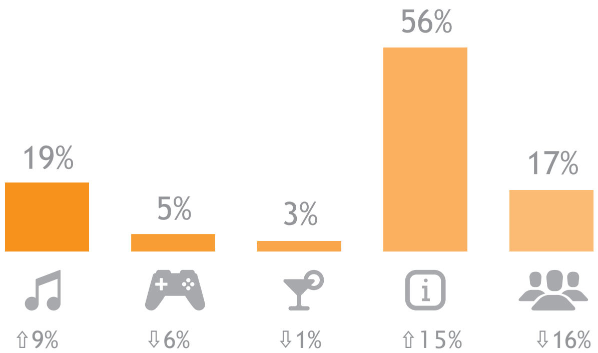

## Asia




## South America




## Africa



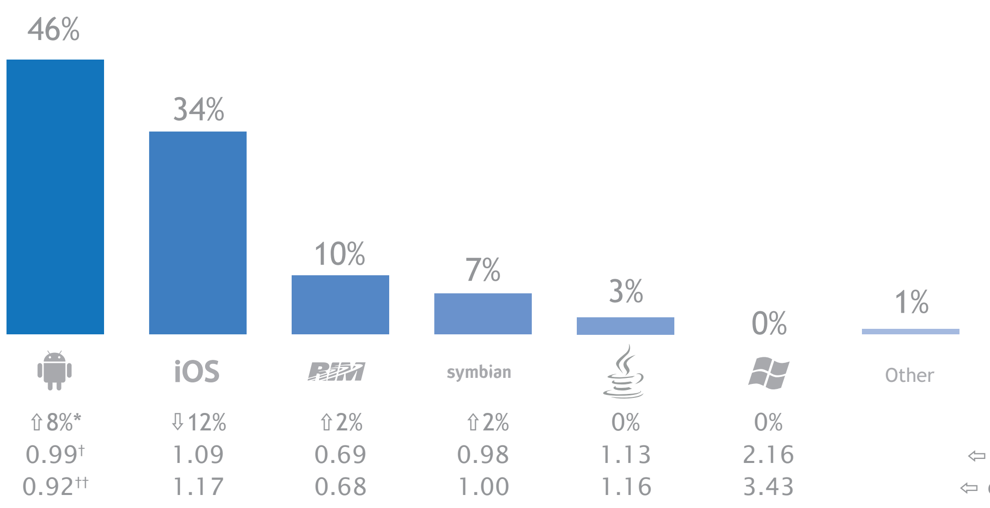

* Q1 - Q2 Change - See section title page for key

# Devices and platforms

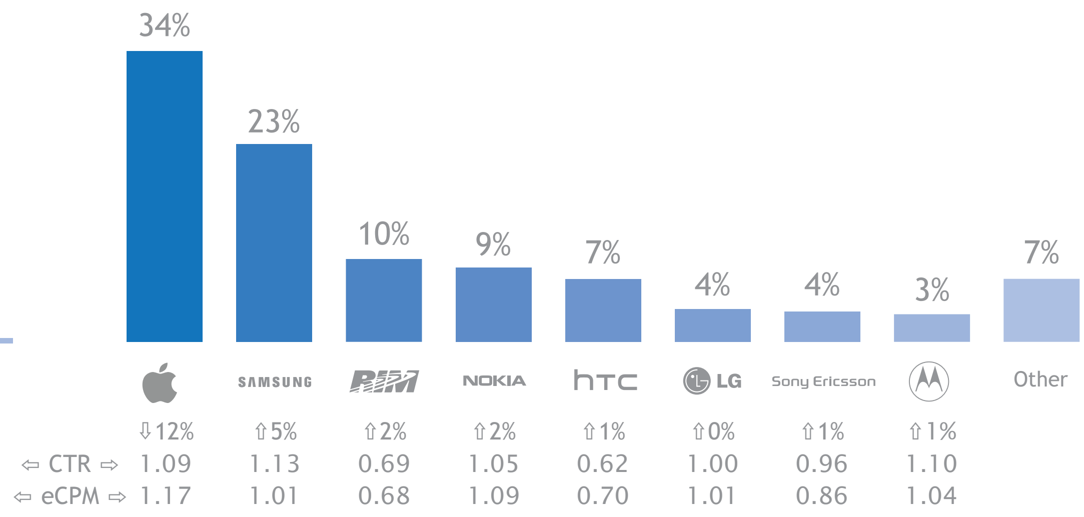
# Top devices and platforms

Ad requests become more evenly distributed across channels, providing advertisers with diverse audiences. The Entertainment, Media and Technology audiences combined account for two-thirds of advertiser spend.

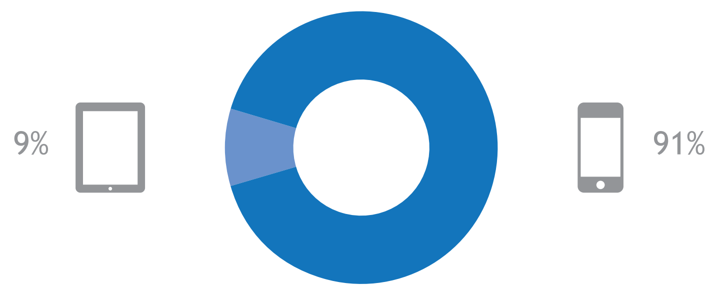
## Platform share of ad impressions




## Manufacturer share of ad impressions




## Impressions - mobile vs tablet



# Top devices and platforms

The iPad captures 55% of all tablet impressions, while the Android market is still very segmented. Within Android, the Kindle Fire continues to gain share and shows above-average CTR and eCPM performance.

## Top mobile devices

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPhone | Apple | iOS | 26.5% | -8% | 1.07 | 1.22 |
| 2 | iPod Touch | Apple | iOS | 5.2% | -3% | 1.22 | 1.12 |
| 3 | Galaxy S2 | Samsung | Android | 4.3% | 1% | 1.05 | 1.04 |
| 4 | BlackBerry 8520 | RIM | RIM | 3.6% | 1% | 0.54 | 0.54 |
| 5 | GT-S5830 | Samsung | Android | 2.9% | 1% | 0.96 | 0.91 |
| 6 | BlackBerry 9300 | RIM | RIM | 2.0% | 1% | 0.72 | 0.64 |
| 7 | I9000 | Samsung | Android | 1.6% | 0% | 0.81 | 1.10 |
| 8 | GT-S5570/Galaxy Mini | Samsung | Android | 1.3% | 0% | 1.10 | 0.82 |
| 9 | Wildfire | HTC | Android | 1.1% | 0% | 0.29 | 0.33 |
| 10 | HTC Desire HD | HTC Corpo | Android | 1.1% | 0% | 0.39 | 0.54 |
| | Other | | | 50.5% | | | |

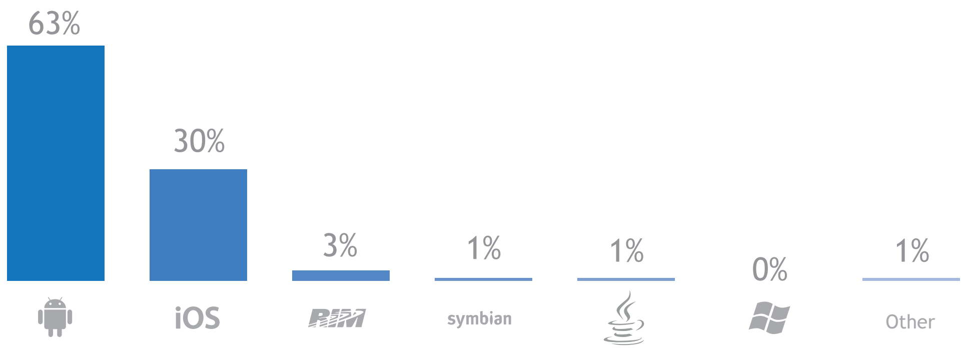
## Top tablets

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPad | Apple | iOS | 54.8% | -12% | 1.04 | 1.00 |
| 2 | Kindle Fire | Amazon | Android | 6.6% | 2% | 1.16 | 1.15 |
| 3 | GT-P1000 Galaxy Tab | Samsung | Android | 5.0% | -2% | 0.75 | 1.12 |
| 4 | GT-P7500 P4 | Samsung | Android | 3.6% | 1% | 0.98 | 0.83 |
| 5 | Eee Pad Transformer | Asus | Android | 2.9% | 1% | 0.72 | 0.76 |
| 6 | GT-P7510 | Samsung | Android | 2.3% | 1% | 0.84 | 0.85 |
| 7 | P6200 | Samsung | Android | 1.7% | 1% | 1.25 | 0.77 |
| 8 | Iconia Tab A500/Picasso | Acer | Android | 1.6% | 0% | 0.82 | 0.81 |
| 9 | AT100 | Toshiba | Android | 0.9% | 0% | 0.83 | 0.86 |
| 10 | Xoom | Motorola | Android | 0.8% | 0% | 0.95 | 1.10 |
| | Other | | | 19.8% | | | |

# Top devices and platforms: North America

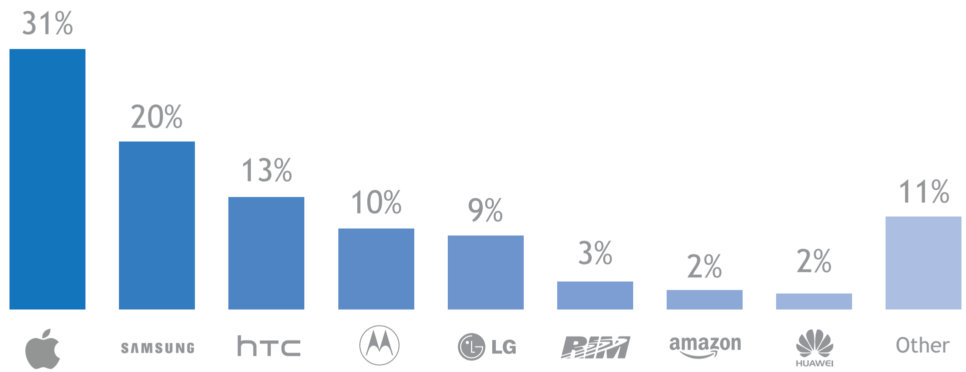
The tablet format slowly increases its share to 11%. Android is dominant by a high margin, with 63% share compared with iOS at 30% share. The Amazon Kindle Fire is carving more space in the overall league of devices.

## Platform share of ad impressions



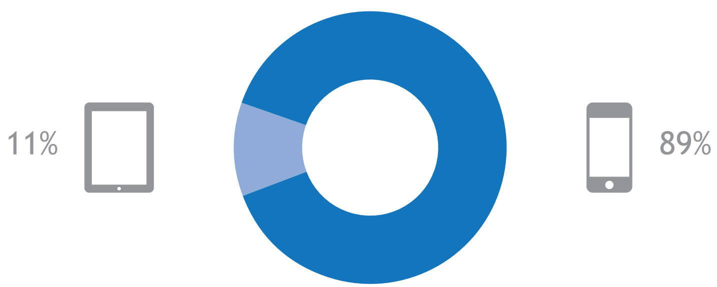

| | Android | iOS | RIM | Symbian | Java | Windows | Other |
|---|---|---|---|---|---|---|---|
| Change | ⇧17%* | ⇩12% | ⇩4% | 0% | 0% | 0% | |
| CTR | 1.03† | 1.04 | 0.35 | 0.69 | 0.45 | 2.12 | |
| eCPM | 0.94†† | 1.07 | 1.26 | 0.96 | 0.74 | 4.13 | |

## Manufacturer share of ad impressions




| | Apple | Samsung | HTC | Motorola | LG | RIM | Amazon | Huawei | Other |
|---|---|---|---|---|---|---|---|---|---|
| Change | ⇩12% | ⇧7% | ⇧3% | ⇧3% | ⇧1% | ⇩4% | 0% | 0% | |
| ⇦ CTR ⇨ | 1.04 | 1.23 | 0.67 | 1.11 | 1.05 | 0.35 | 1.06 | 1.33 | |
| ⇦ eCPM ⇨ | 1.07 | 1.12 | 0.69 | 1.04 | 0.98 | 1.26 | 0.99 | 1.08 | |

## Impressions - mobile vs tablet



# Top devices and platforms: North America

The Kindle Fire is second to the iPad in volume of impressions but is far above in terms of CTR and eCPM. The iPhone loses 8% market share this quarter, but still generates 15% above-average CTR performance.

## Top mobile devices

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPhone | Apple | iOS | 18.8% | -8% | 1.02 | 1.15 |
| 2 | iPod Touch | Apple | iOS | 10.1% | -5% | 1.18 | 1.03 |
| 3 | PC36100 | HTC | Android | 3.0% | 0% | 0.20 | 0.28 |
| 4 | SCH-R720 | Samsung | Android | 2.2% | 1% | 1.52 | 1.21 |
| 5 | HTC Desire HD | HTC Corpo | Android | 2.1% | 1% | 0.26 | 0.33 |
| 6 | HTC EVO 3D | HTC | Android | 1.9% | 1% | 0.80 | 0.72 |
| 7 | DROID RAZR | Motorola | Android | 1.8% | 1% | 1.31 | 1.27 |
| 8 | LS670 | LG | Android | 1.5% | 0% | 0.75 | 0.67 |
| 9 | DroidX | Motorola | Android | 1.5% | 0% | 1.02 | 0.98 |
| 10 | SCH-I500 | Samsung | Android | 1.4% | 0% | 1.19 | 1.08 |
| | Other | | | 55.7% | | | |

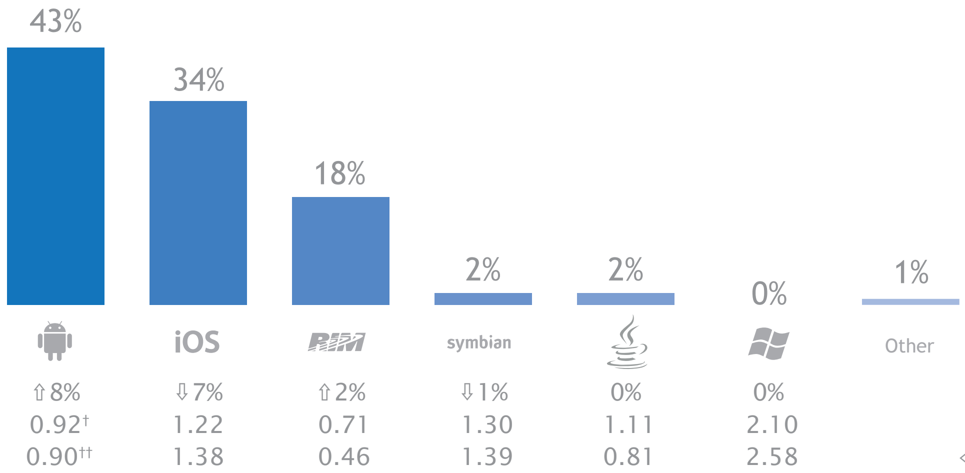
## Top tablets

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPad | Apple | iOS | 43.4% | 1% | 0.85 | 0.90 |
| 2 | Kindle Fire | Amazon | Android | 21.4% | -3% | 1.22 | 1.17 |
| 3 | Eee Pad Transformer | Asus | Android | 3.2% | 0% | 0.74 | 0.68 |
| 4 | GT-P7510 | Samsung | Android | 2.9% | 0% | 0.81 | 0.84 |
| 5 | AT100 | Toshiba | Android | 2.3% | -1% | 0.83 | 0.84 |
| 6 | SCH-I800 | Samsung | Android | 2.2% | 0% | 1.09 | 1.32 |
| 7 | Iconia Tab A500/Picasso | Acer | Android | 2.1% | -1% | 0.89 | 0.83 |
| 8 | E201 | Enspert | Android | 2.0% | 2% | 0.05 | 0.07 |
| 9 | Xoom | Motorola | Android | 1.7% | 0% | 0.91 | 0.80 |
| 10 | 9 | Pandigital | Android | 1.1% | 0% | 1.97 | 1.70 |
| | Other | | | 17.7% | | | |

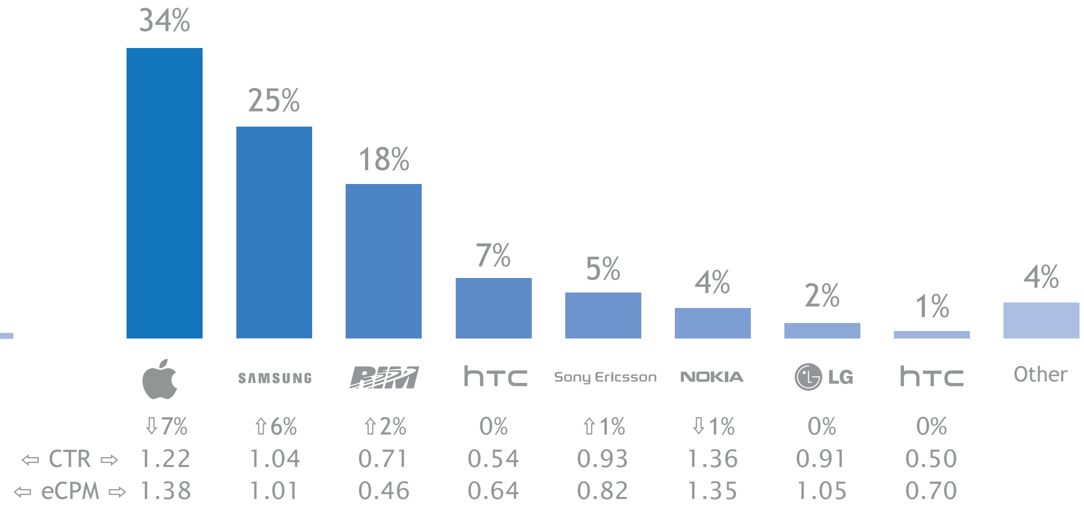
# Top devices and platforms: Europe

The Android platform takes 8% market share away from iOS, which however still commands a significant eCPM premium of 53% over Android. RIM still maintains a significant share in Europe (18%), where Blackberry Messenger is popular with younger demographics.

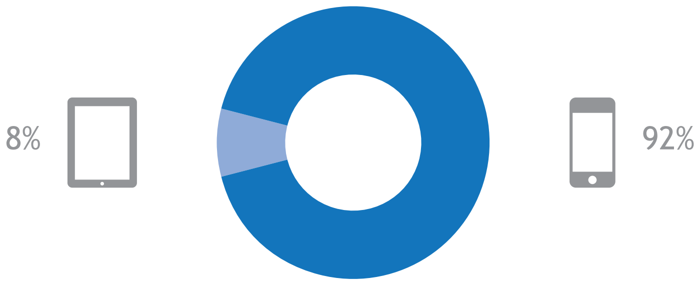
## Platform share of ad impressions




## Manufacturer share of ad impressions




## Impressions - mobile vs tablet



# Top devices and platforms: Europe

Of the top ten European devices, Apple devices achieve the highest CTR and eCPM.

## Top mobile devices

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPhone | Apple | iOS | 28.7% | -2% | 1.24 | 1.43 |
| 2 | Galaxy S2 | Samsung | Android | 6.8% | 2% | 1.08 | 1.11 |
| 3 | BlackBerry 8520 | RIM | RIM | 6.4% | -1% | 0.52 | 0.34 |
| 4 | GT-S5830 | Samsung | Android | 5.7% | 2% | 0.91 | 0.81 |
| 5 | BlackBerry 9300 | RIM | RIM | 4.0% | 1% | 0.74 | 0.46 |
| 6 | iPod Touch | Apple | iOS | 2.9% | -3% | 1.28 | 1.43 |
| 7 | I9000 | Samsung | Android | 2.4% | 0% | 0.81 | 1.15 |
| 8 | GT-S5570/Galaxy Mini | Samsung | Android | 2.3% | 1% | 0.99 | 0.74 |
| 9 | BlackBerry 9800 | RIM | RIM | 2.1% | 0% | 0.86 | 0.54 |
| 10 | Wildfire | HTC | Android | 2.0% | -1% | 0.29 | 0.32 |
| | Other | | | 36.7% | | | |

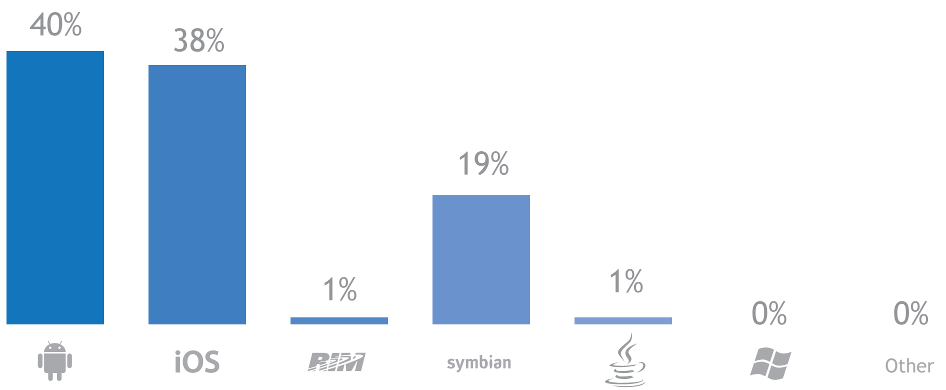
## Top tablets

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPad | Apple | iOS | 61.2% | -12% | 1.08 | 1.05 |
| 2 | GT-P7500 P4 | Samsung | Android | 4.9% | 2% | 1.00 | 0.86 |
| 3 | Eee Pad Transformer | Asus | Android | 3.7% | 1% | 0.72 | 0.76 |
| 4 | GT-P1000 Galaxy Tab | Samsung | Android | 3.6% | 1% | 0.72 | 1.39 |
| 5 | GT-P7510 | Samsung | Android | 2.7% | 1% | 0.88 | 0.83 |
| 6 | Iconia Tab A500/Picasso | Acer | Android | 1.9% | 0% | 0.73 | 0.71 |
| 7 | Tablet S | Sony | Android | 1.2% | 0% | 0.76 | 0.75 |
| 8 | A501 | Acer | Android | 1.0% | 0% | 0.90 | 0.71 |
| 9 | A101 | Archos | Android | 0.8% | 0% | 0.19 | 0.40 |
| 10 | Galaxy Tab 10.1 | Samsung | Android | 0.8% | 0% | 1.34 | 1.00 |
| | Other | | | 18.2% | | | |

# Top devices and platforms: Asia

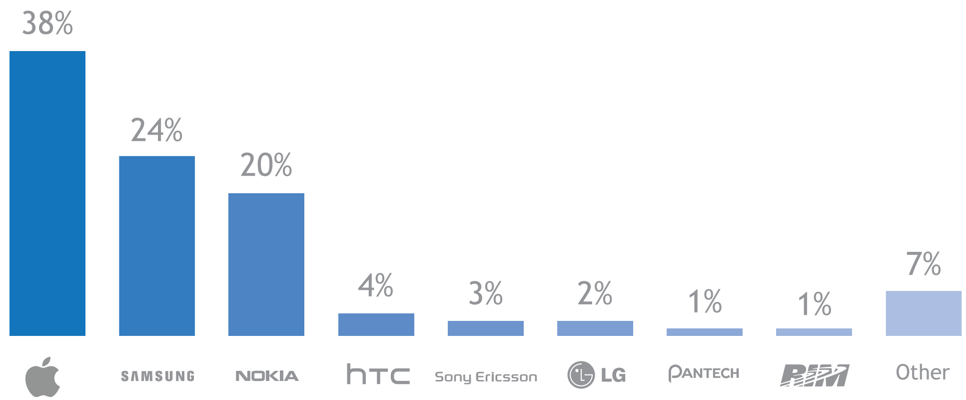
Nokia and Symbian hold around one fifth of the Asian market and achieve high eCPMs, +43% higher than the Asia average.

## Platform share of ad impressions



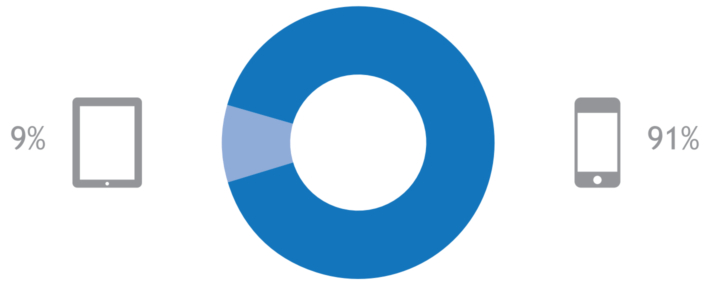

| | | | | | |
|---|---|---|---|---|---|
| ⇧4%* | ⇩14% | ⇧0% | ⇧10% | 0% | 0% |
| 1.01† | 0.97 | 1.29 | 0.98 | 1.56 | 2.17 |
| 0.76†† | 0.98 | 1.25 | 1.43 | 2.50 | 4.25 |

## Manufacturer share of ad impressions




| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | ⇩13% | ⇧4% | ⇧1% | 0% | 0% | 0% | 0% | 0% |
| ⇦ CTR ⇨ | 0.97 | 1.16 | 1.02 | 0.53 | 1.00 | 0.74 | 1.17 | 1.2 |
| ⇦ eCPM ⇨ | 0.96 | 0.84 | 1.51 | 0.47 | 0.74 | 0.73 | 0.72 | 1.25 |

## Impressions - mobile vs tablet



# Top devices and platforms: Asia

Apple devices lose share to Android and Symbian. The iPhone loses 11% share, and the iPad loses 16%.

## Top mobile devices

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPhone | Apple | iOS | 32.9% | -11% | 0.90 | 0.96 |
| 2 | Galaxy S2 | Samsung | Android | 4.6% | 1% | 1.07 | 0.67 |
| 3 | iPod Touch | Apple | iOS | 3.7% | -1% | 1.45 | 1.12 |
| 4 | E63 | Nokia | Symbian | 3.3% | 2% | 0.32 | 0.48 |
| 5 | E71 | Nokia | Symbian | 2.5% | 2% | 0.33 | 0.49 |
| 6 | GT-N7000 Galaxy Note | Samsung | Android | 1.9% | 1% | 0.94 | 0.69 |
| 7 | SHW-M250S Galaxy S2 | Samsung | Android | 1.9% | 0% | 1.01 | 0.59 |
| 8 | I9000 | Samsung | Android | 1.9% | 0% | 0.81 | 0.90 |
| 9 | GT-S5830 | Samsung | Android | 1.7% | 0% | 1.31 | 1.04 |
| 10 | GT-S5360 | Samsung | Android | 1.6% | 1% | 2.41 | 1.16 |
| | Other | | | 44.0% | | | |

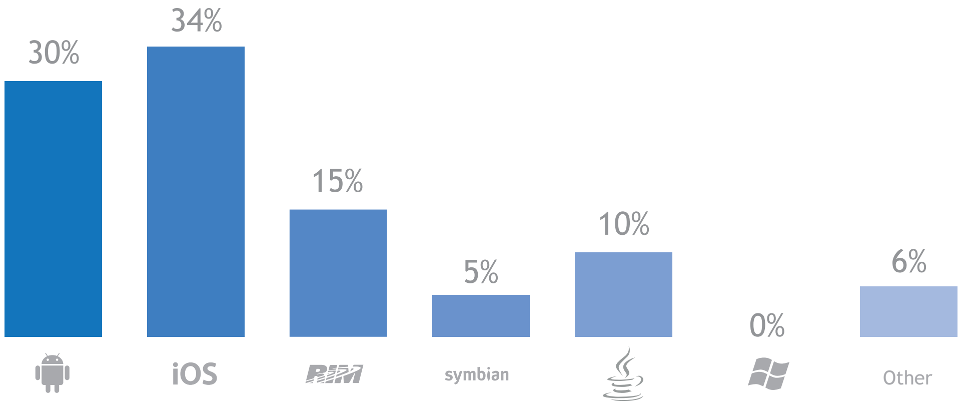
## Top tablets

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPad | Apple | iOS | 56.6% | -16% | 1.10 | 1.01 |
| 2 | GT-P1000 Galaxy Tab | Samsung | Android | 12.9% | 1% | 0.70 | 1.36 |
| 3 | GT-P7500 P4 | Samsung | Android | 5.1% | 2% | 0.93 | 0.69 |
| 4 | P6200 | Samsung | Android | 4.9% | 3% | 1.35 | 0.94 |
| 5 | Eee Pad Transformer | Asus | Android | 1.8% | 1% | 0.60 | 0.40 |
| 6 | P6800 | Samsung | Android | 1.6% | 2% | 1.28 | 1.07 |
| 7 | GT-P7510 | Samsung | Android | 1.3% | 1% | 0.64 | 0.51 |
| 8 | Galaxy Tab 8.9 | Samsung | Android | 1.3% | 1% | 1.02 | 0.82 |
| 9 | SHW-M380 Galaxy Tab 10.1 | Samsung | Android | 1.2% | 0% | 0.93 | 0.52 |
| 10 | Iconia Tab A500/Picasso | Acer | Android | 0.8% | 0% | 0.81 | 0.74 |
| | Other | | | 12.5% | | | |

# Top devices and platforms: South America

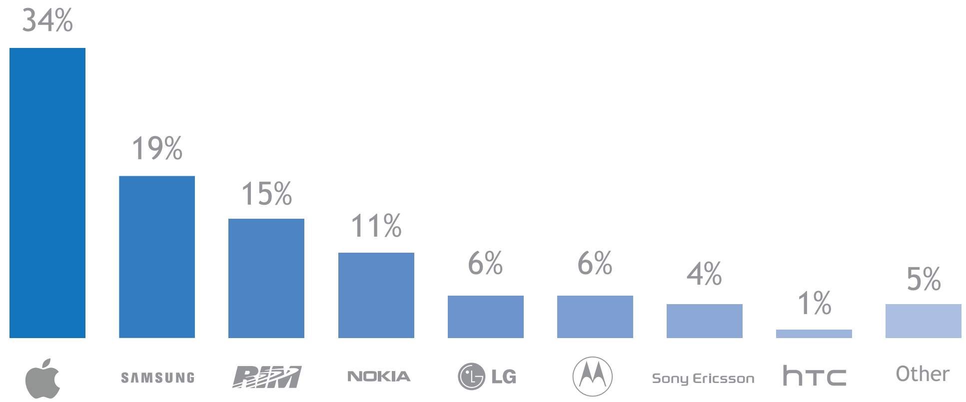
RIM, an attractive platform for younger audiences, takes about 9% market share from iOS and Android. Although Apple still dominates the manufacturer league, with 34% of ad impressions, Samsung achieves the highest CTR (+44% above average) and eCPM (+41%).

## Platform share of ad impressions



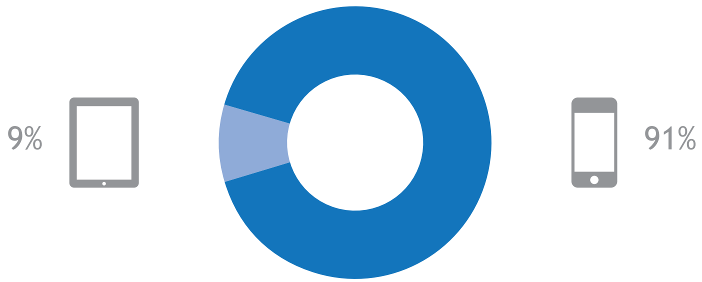

| | Android | iOS | RIM | symbian | Java | Windows |
|---|---|---|---|---|---|---|
| | ⇩6%* | ⇩4% | ⇧9% | 0% | ⇧1% | 0% |
| | 1.31† | 1.00 | 0.42 | 0.96 | 0.94 | 2.15 |
| | 1.19†† | 0.78 | 0.89 | 1.22 | 1.15 | 2.00 |

## Manufacturer share of ad impressions




| | Apple | SAMSUNG | RIM | NOKIA | LG | Motorola | Sony Ericsson | HTC |
|---|---|---|---|---|---|---|---|---|
| | ⇩4% | ⇧1% | ⇧8% | 0% | ⇩1% | ⇩3% | 0% | 0% |
| ⇦ CTR ⇨ | 0.99 | 1.44 | 0.42 | 0.95 | 1.09 | 1.10 | 0.99 | 0.73 |
| ⇦ eCPM ⇨ | 0.78 | 1.41 | 0.89 | 1.18 | 1.36 | 0.77 | 0.79 | 0.49 |

## Impressions - mobile vs tablet



# Top devices and platforms: South America

The Blackberry 8520 Curve is the most popular RIM device, despite a CTR 60% lower than average. Samsung's Galaxy Mini shows top CTR performance (+117%), with 15% market share. Samsung emerges as the strongest challenger to Apple's 68% share of the tablet market.

## Top mobile devices

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPhone | Apple | iOS | 21.7% | -3% | 1.07 | 0.89 |
| 2 | iPod Touch | Apple | iOS | 9.2% | -2% | 0.79 | 0.49 |
| 3 | BlackBerry 8520 | RIM | RIM | 8.8% | 5% | 0.40 | 0.83 |
| 4 | Galaxy S2 | Samsung | Android | 2.5% | 0% | 1.17 | 0.76 |
| 5 | BlackBerry 9300 | RIM | RIM | 2.5% | 1% | 0.54 | 1.13 |
| 6 | GT-S5830L Galaxy Ace | Samsung | Android | 1.9% | -1% | 1.51 | 0.96 |
| 7 | C3-00 | Nokia | Java | 1.7% | 0% | 1.01 | 1.25 |
| 8 | GT-S5570L | Samsung | Android | 1.5% | 0% | 2.17 | 1.74 |
| 9 | N8-00 | Nokia | Symbian | 1.4% | 0% | 1.20 | 1.74 |
| 10 | P500h | LG | Android | 1.2% | -1% | 1.07 | 0.98 |
| | Other | | | 47.8% | | | |

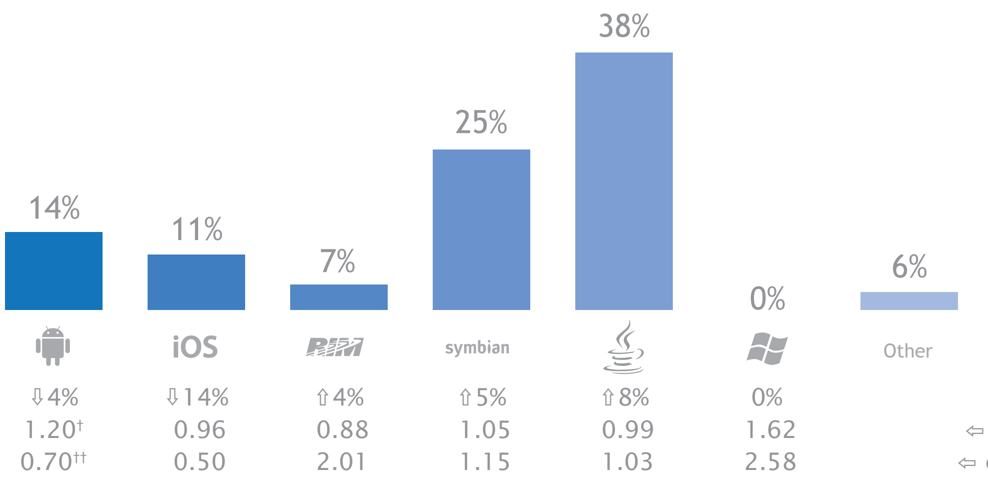
## Top tablets

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPad | Apple | iOS | 67.8% | 9% | 1.04 | 0.80 |
| 2 | GT-P1000L | Samsung | Android | 4.6% | -5% | 0.81 | 5.48 |
| 3 | GT-P1010 Galaxy Tab | Samsung | Android | 2.9% | -1% | 0.84 | 0.65 |
| 4 | GT-P7500 P4 | Samsung | Android | 2.4% | 0% | 0.95 | 0.56 |
| 5 | P6200 | Samsung | Android | 1.9% | 1% | 1.49 | 1.42 |
| 6 | GT-P7510 | Samsung | Android | 1.5% | -1% | 0.87 | 0.49 |
| 7 | Xoom MZ605 | Motorola | Android | 1.5% | -1% | 0.83 | 0.56 |
| 8 | Iconia Tab A500/Picasso | Acer | Android | 1.0% | 0% | 0.93 | 0.37 |
| 9 | Eee Pad Transformer | Asus | Android | 0.8% | 0% | 0.61 | 0.35 |
| 10 | Galaxy Tab 8.9 | Samsung | Android | 0.8% | 0% | 0.73 | 0.49 |
| | Other | | | 14.8% | | | |

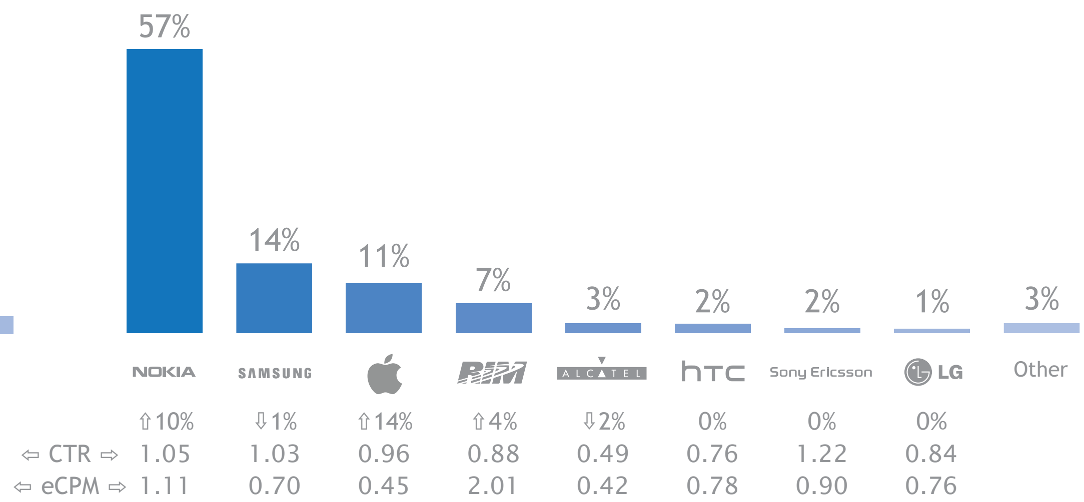
# Top devices and platforms: Africa

The Java and Symbian platforms increase their dominance, with a combined 63% of the market, against 50% last quarter. Nokia, the most recognised brand in Africa (source: The Economist), accounts for 57% of all ad impressions in Q2.

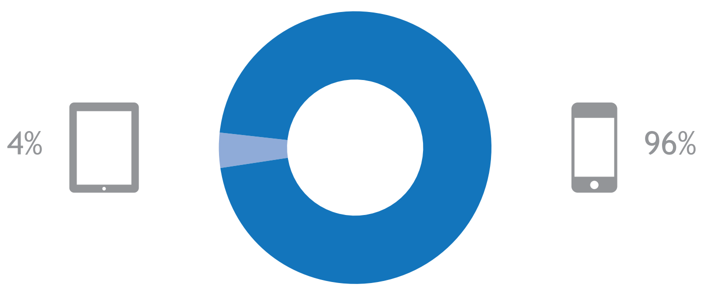
## Platform share of ad impressions




## Manufacturer share of ad impressions




## Impressions - mobile vs. tablet



# Top devices and platforms: Africa

Despite Nokia's overall market share, Apple and RIM take the top two positions in an extremely fragmented market, with RIM more than doubling the average eCPM.

## Top mobile devices

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPhone | Apple | iOS | 8.4% | -11% | 0.97 | 0.50 |
| 2 | BlackBerry 8520 | RIM | RIM | 4.3% | 3% | 0.97 | 2.16 |
| 3 | X2-01 | Nokia | Java | 3.6% | 0% | 1.02 | 1.10 |
| 4 | C1-01 | Nokia | Java | 3.5% | 2% | 1.55 | 1.70 |
| 5 | 1680 classic | Nokia | Java | 3.3% | 2% | 0.58 | 0.47 |
| 6 | 6300 | Nokia | Java | 3.3% | -2% | 0.70 | 0.75 |
| 7 | C3-00 | Nokia | Java | 2.6% | -1% | 1.26 | 1.38 |
| 8 | 5130 XpressMusic | Nokia | Java | 2.5% | 0% | 0.93 | 1.13 |
| 9 | E63 | Nokia | Symbian | 2.3% | 1% | 0.62 | 0.82 |
| 10 | 6120 classic | Nokia | Symbian | 2.3% | 1% | 0.72 | 0.59 |
| | Other | | | 63.9% | | | |

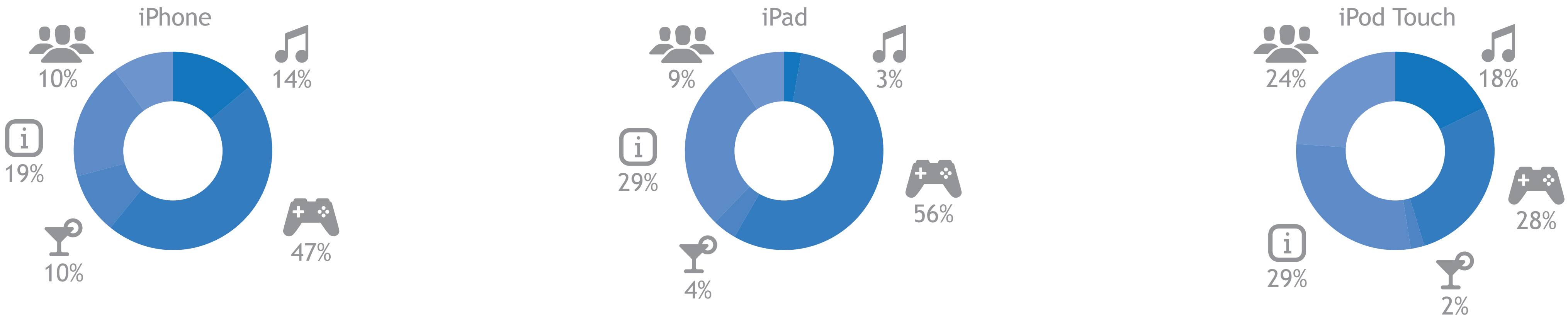
## Top tablets

| | Model | Brand | Platform | %age of Ad Impressions | %age increase vs Q1 | CTR Index | eCPM Index |
|---|---|---|---|---|---|---|---|
| 1 | iPad | Apple | iOS | 61.2% | -12% | 1.08 | 1.05 |
| 2 | GT-P7500 P4 | Samsung | Android | 4.9% | 2% | 1.00 | 0.86 |
| 3 | Eee Pad Transformer | Asus | Android | 3.7% | 1% | 0.72 | 0.76 |
| 4 | GT-P1000 Galaxy Tab | Samsung | Android | 3.6% | 1% | 0.72 | 1.39 |
| 5 | GT-P7510 | Samsung | Android | 2.7% | 1% | 0.88 | 0.83 |
| 6 | Iconia Tab A500/Picasso | Acer | Android | 1.9% | 0% | 0.73 | 0.71 |
| 7 | Tablet S | Sony | Android | 1.2% | 0% | 0.76 | 0.75 |
| 8 | A501 | Acer | Android | 1.0% | 0% | 0.90 | 0.71 |
| 9 | A101 | Archos | Android | 0.8% | 0% | 0.19 | 0.40 |
| 10 | Galaxy Tab 10.1 | Samsung | Android | 0.8% | 0% | 1.34 | 1.00 |
| | Other | | | 18.2% | | | |

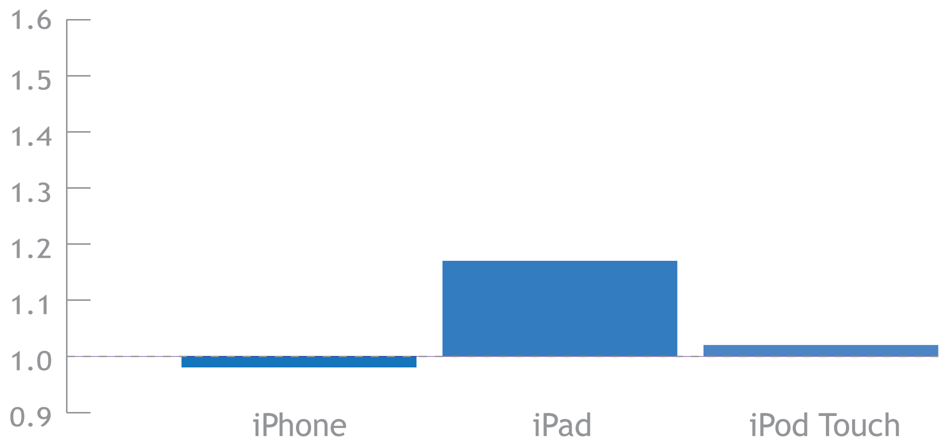
# Focus on Apple

While iPhones and iPads are still used primarily for games, with 47% and 56% of ad requests respectively, the iPod Touch includes the largest proportion of Social Networking users (24%). The iPad achieves the highest CTR (+17%) across all Apple devices, particularly on the Games channel (+59%).

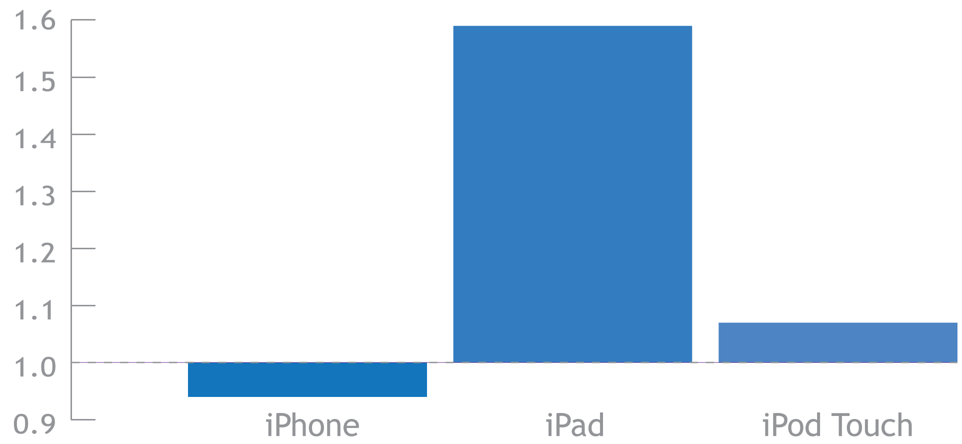
## Channel mix per Apple device




## CTR index

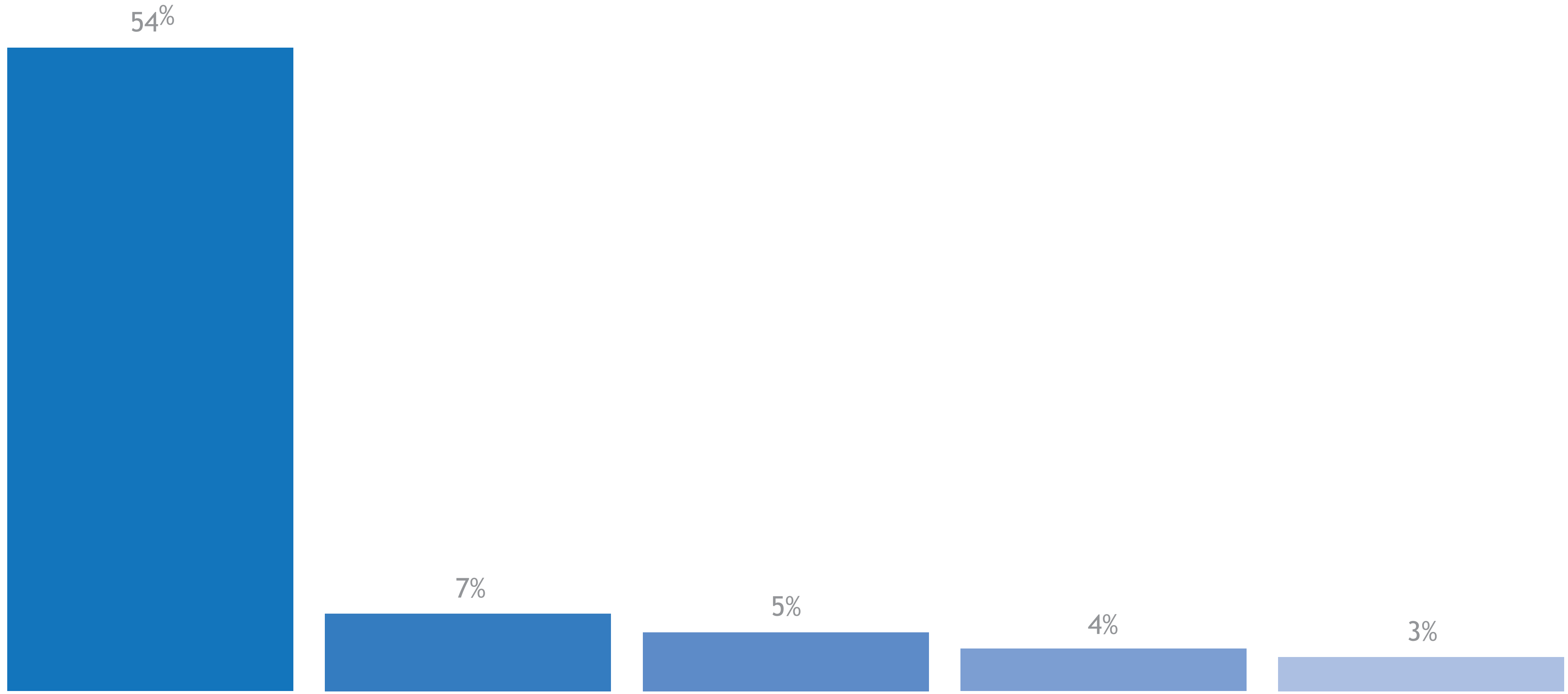



## Games channel CTR index



# Focus on tablets

## Top five tablets ranked by ad impressions




| | Apple iPad | Amazon Kindle Fire | Samsung GT-P1000 Galaxy Tab | Samsung GT-P7500 | Asus Eee Pad Transfomer |
|---|---|---|---|---|---|
| | #2 across all devices | #23 across all devices | #31 across all devices | #39 across all devices | #52 across all devices |
| CTR uplift* | 4% | 16% | −25% | −2% | −28% |
| eCPM uplift* | 0% | 15% | 12% | −17% | −24% |

*uplift compared to average

# Advertisers & Verticals

## Advertiser Verticals

- Entertainment & Media
- Technology & Telecoms
- Business & Finance
- News & Education
- Social & Dating
- FMCG & Retail
- Automotive
- Travel
- Lifestyle & Health
- Style & Fashion
- Legal & CSR

## Publisher Channels

- Entertainment
- Games
- Lifestyle
- News, Sport & Information
- Social networking

## Demographics

- Male
- Female

## Performance metrics

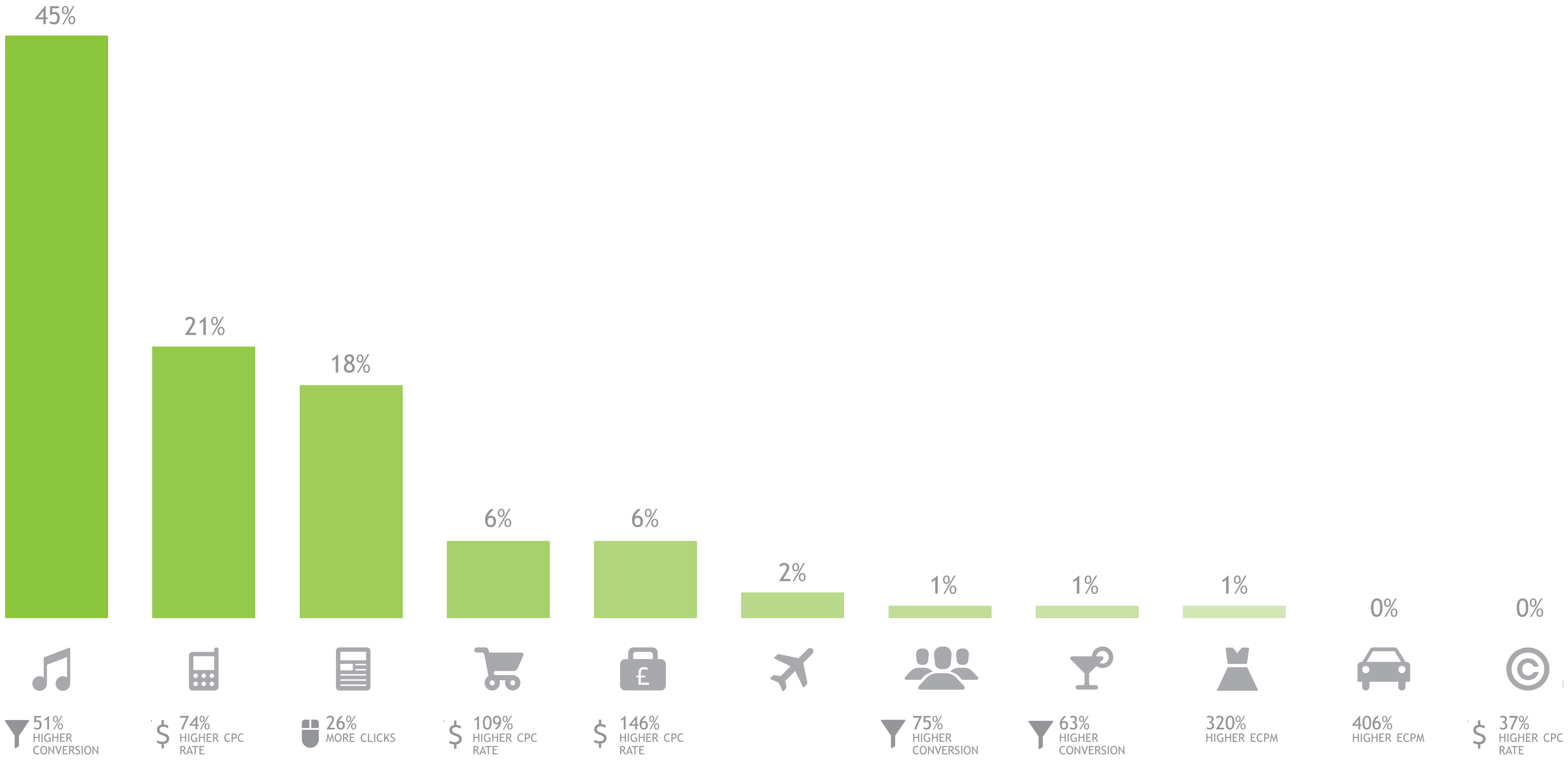
- CTR
- Conversion Rate
- CPC Pricing

# Mix of verticals

Entertainment and Technology together drive 67% of spend. Entertainment & Media achieves a conversion rate 260% above average, with consumers keen to install media-related apps. Business & Finance and FMCG & Retail command CPCs 29% and 130% above average. Social & Dating delivers the highest CTR performance, 127% above average, while Style & Fashion campaigns deliver 62% above average. Automotive delivers the highest eCPM, at 152% above average, and a 127% higher CTR.

# Mix of verticals: North America

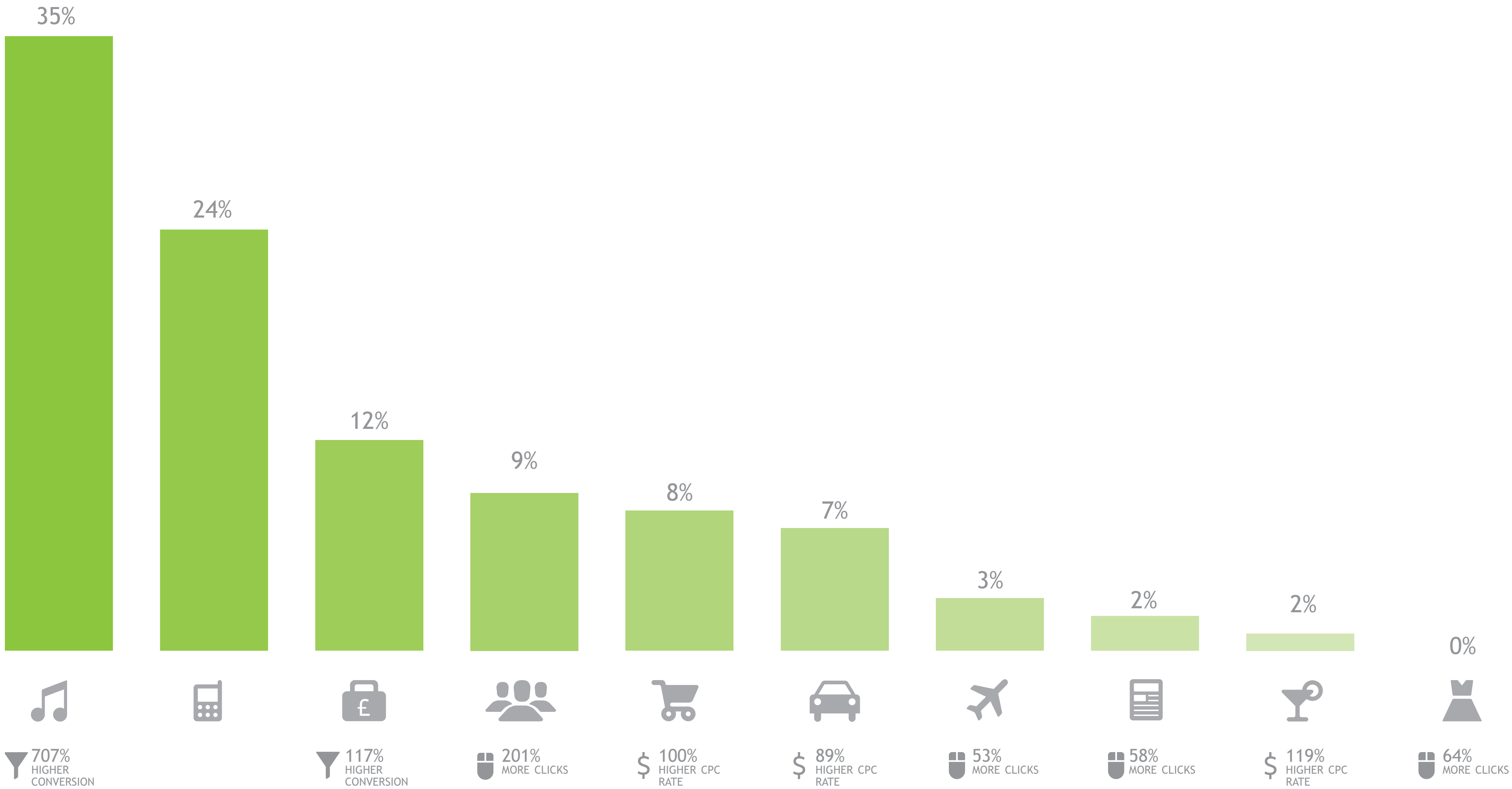
The News & Education vertical takes third position in North America, where it achieves +26% CTR. The Business & Finance vertical can be expected to pay about 2.5 times the average CPC, to reach a valuable mobile audience with targeted messages.




See section title page for key

# Mix of verticals: Europe

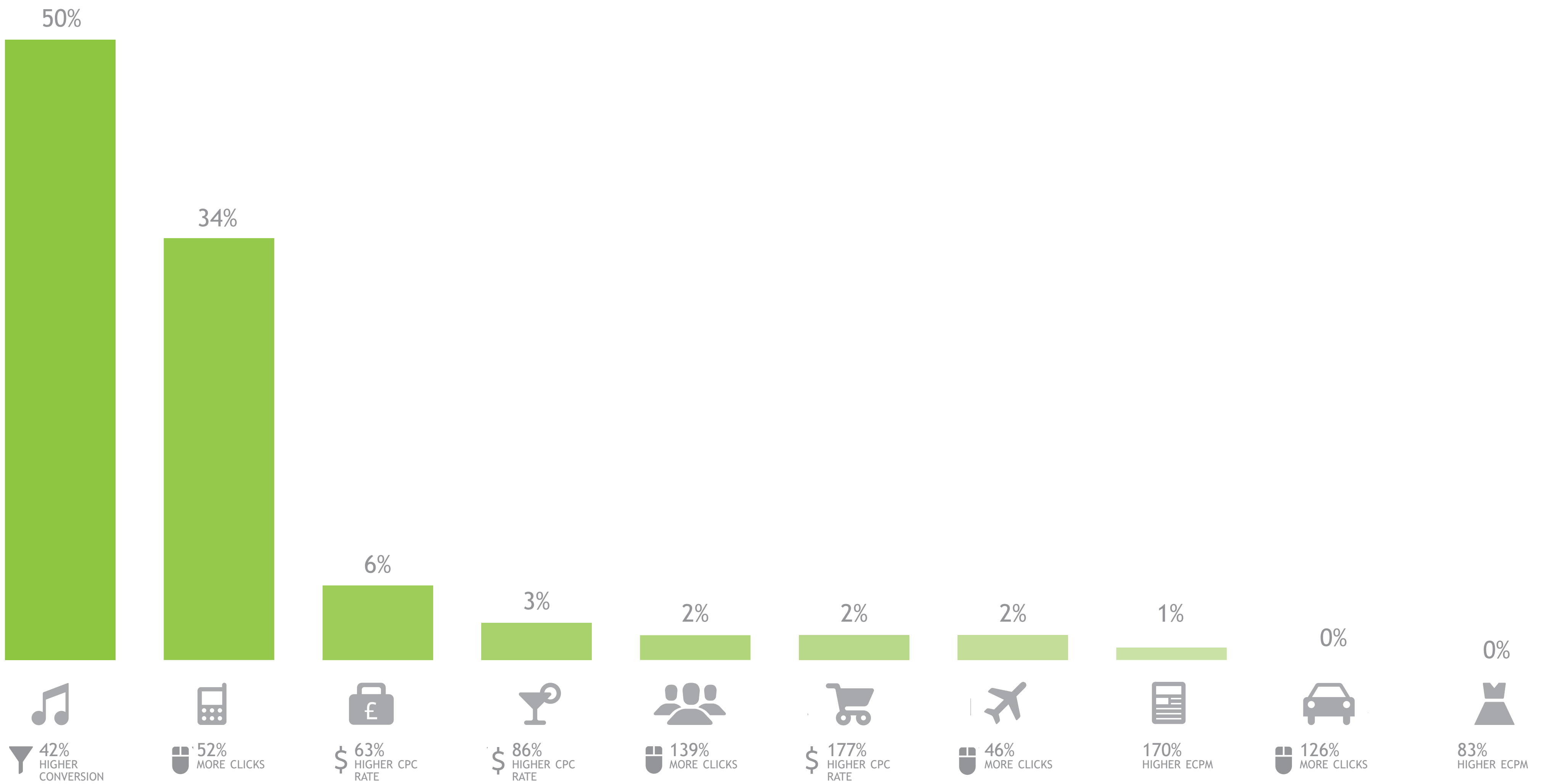
Entertainment & Media achieves an impressive conversion uplift of 707% above average, followed by Business & Finance (+117%). FMCG, Lifestyle and Automotive command higher CPC prices, 100%, 119% and 89% above average respectively. Travel is a popular vertical, with +53% CTR.




See section title page for key

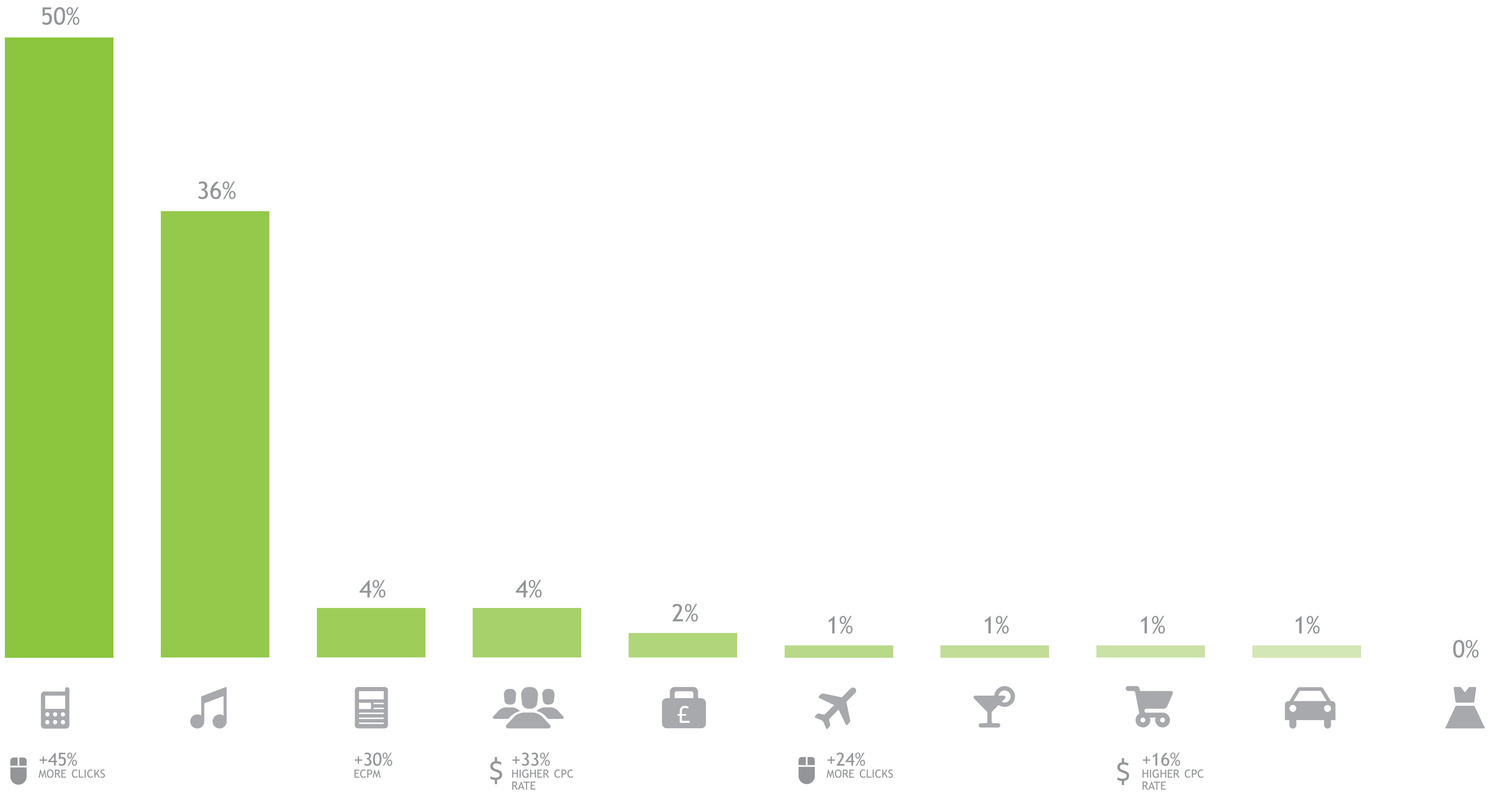
# Mix of verticals: Asia

Entertainment & Media drives 50% of spend, achieving an impressive +42% conversion rate uplift. Technology & Telecoms follows with CTRs 52% above average. Social & Dating is promising, with a CTR 139% above average, while FMCG places higher value on mobile consumers, with CPC 177% above average.



# Mix of verticals: South America

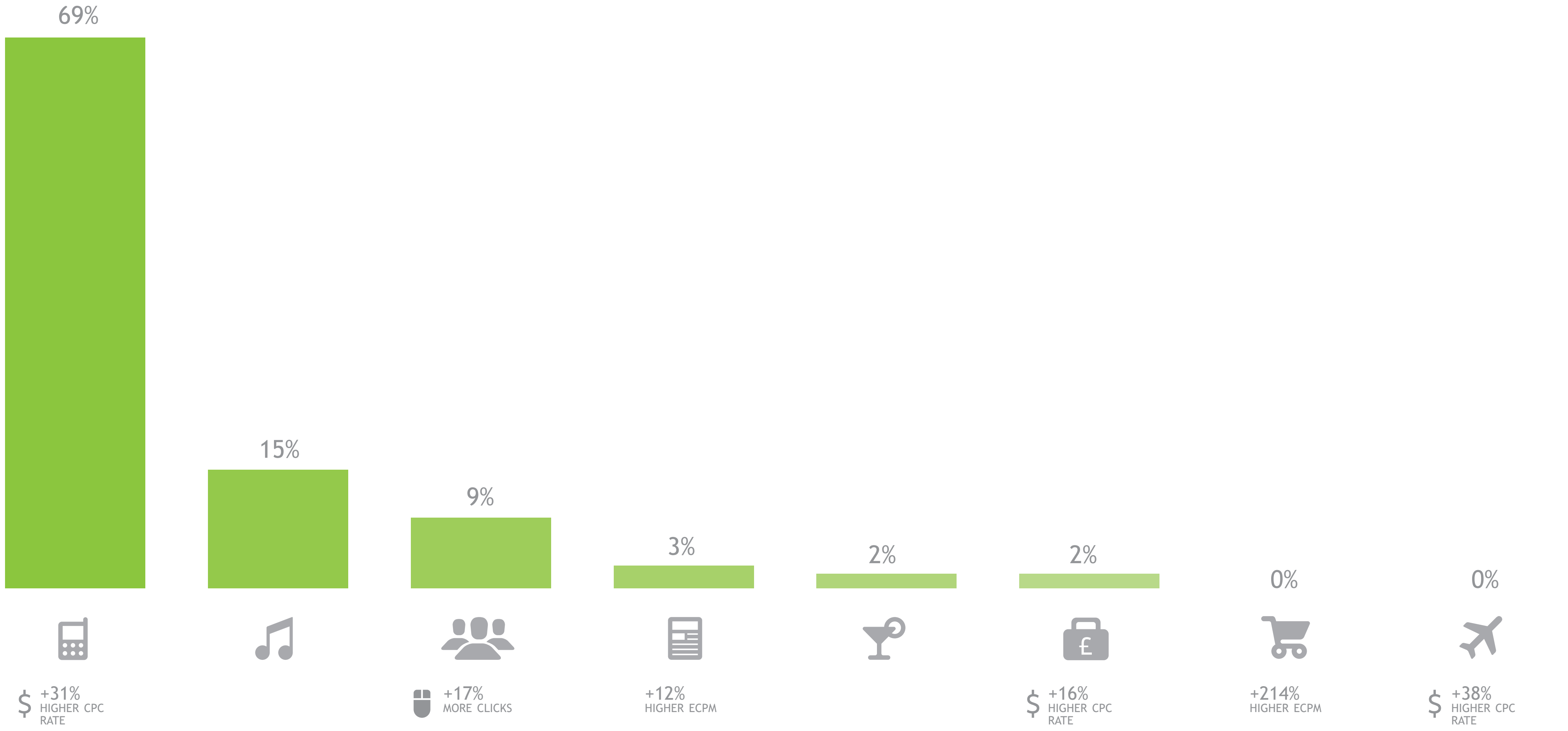
Entertainment & Media makes up 50% of the advertising spend and achieves some of the highest CTRs (45% higher than the average) followed by Travel (+24%). The Social & Dating vertical commands higher CPC prices (+33%).




See section title page for key

# Mix of verticals: Africa

69% of the advertising spend in Q2 comes from the Technology & Telecoms vertical, while FMCG & Retail campaigns generate an eCPM 214% higher than the average.

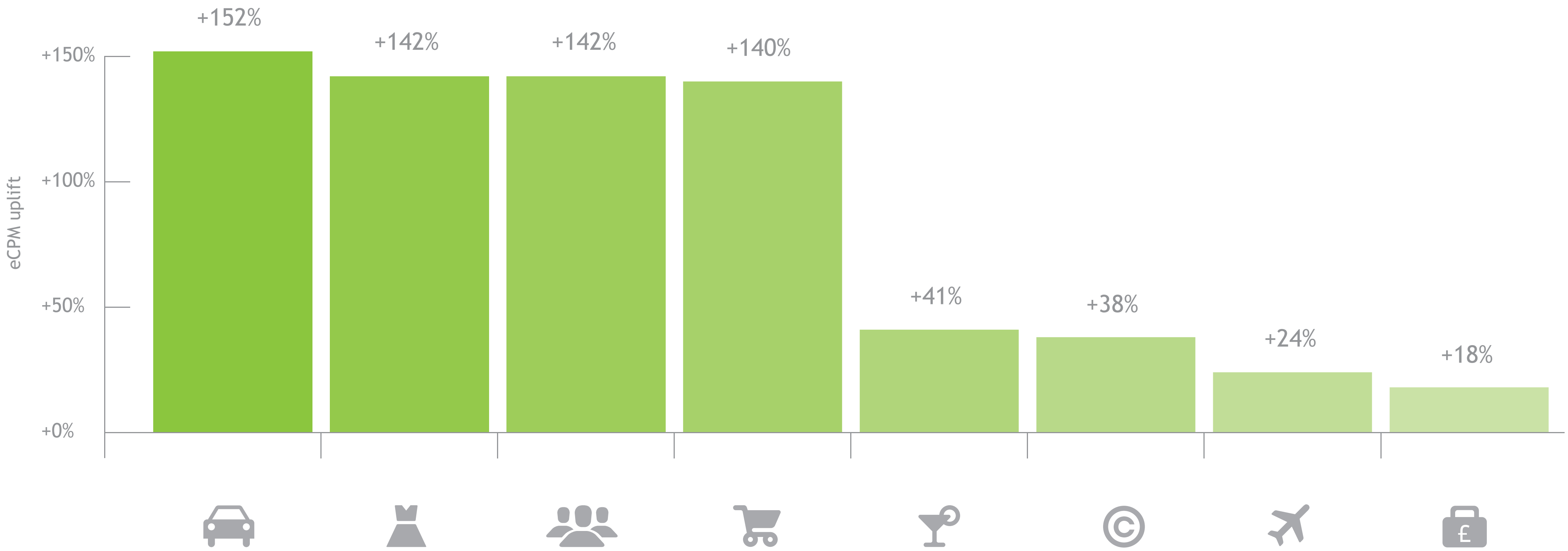



See section title page for key

# Pricing and performance per vertical

The eCPM from the top verticals (Automotive, Style & Fashion, Social & Dating and FMCG & Retail) is 140% above average, driven by higher CPCs and CTRs, which means publishers providing content relevant to these audiences can expect effective monetization.

## eCPM uplift vs. average on CPC campaigns




| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| CPC index | 2.28 | 1.50 | 1.07 | 2.30 | 1.51 | 1.35 | 1.08 | 1.29 |
| CTR index | 1.11 | 1.62 | 2.27 | 1.05 | 0.94 | 1.02 | 1.14 | 0.91 |

See section title page for key

# Pricing and performance per vertical

The ability to reach high-value consumers on mobile platforms is increasingly valuable. This reflects the price point range for conversion-driven campaigns. High-value verticals like Automotive command $50-$100. Most verticals acquire customers at a cost proportionate to the typical customer lifetime value for their industry.

## Typical CPA price ranges per vertical


See section title page for key

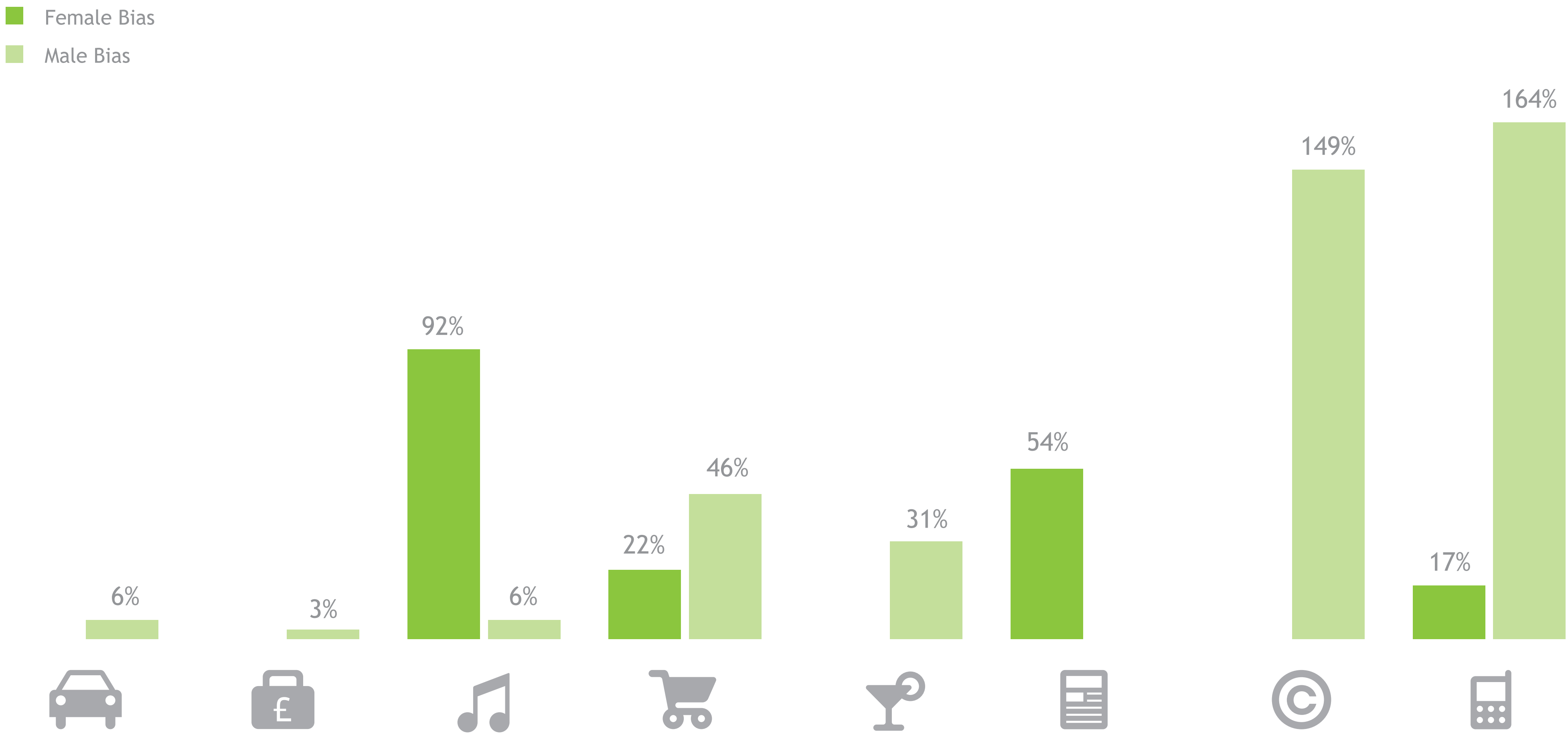
# Pricing and performance per region

CTR performance varies significantly across regions, reflecting cultural and creative differences. The most popular verticals in Europe are FMCG & Retail (31% higher CTR than other regions), Lifestyle (+55%), Travel (+33%) and Social & Dating (+23%). In North America, Technology & Telecoms generates +37% CTR, then Style & Fashion (+32%), Entertainment & Media (+15%) and Automotive (+15%). In Asia, Automotive generates +85% CTR, followed by Technology & Telecoms (+45%) and Travel (+19%).


See section title page for key

# Performance increase from gender targeting

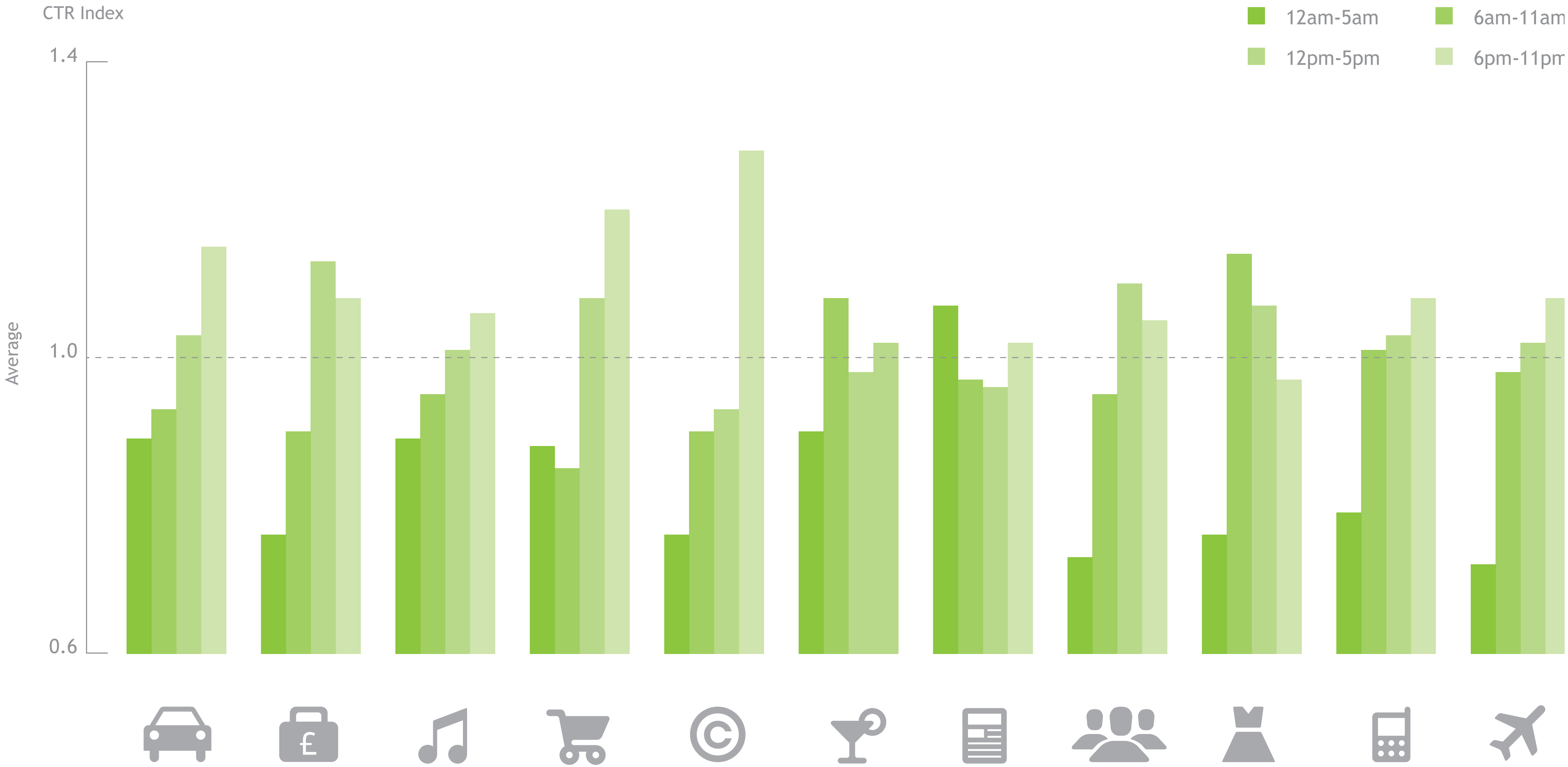
Gender targeting provides a CTR uplift to advertisers with customized creatives and targeted messaging. Male targeting yields a 164% uplift for Technology & Telecoms campaigns, while female targeting provides a 92% uplift on Entertainment & Media. For FMCG & Retail, gender-specific targeting increases CTR by 22% for females and 46% for males.




See section title page for key

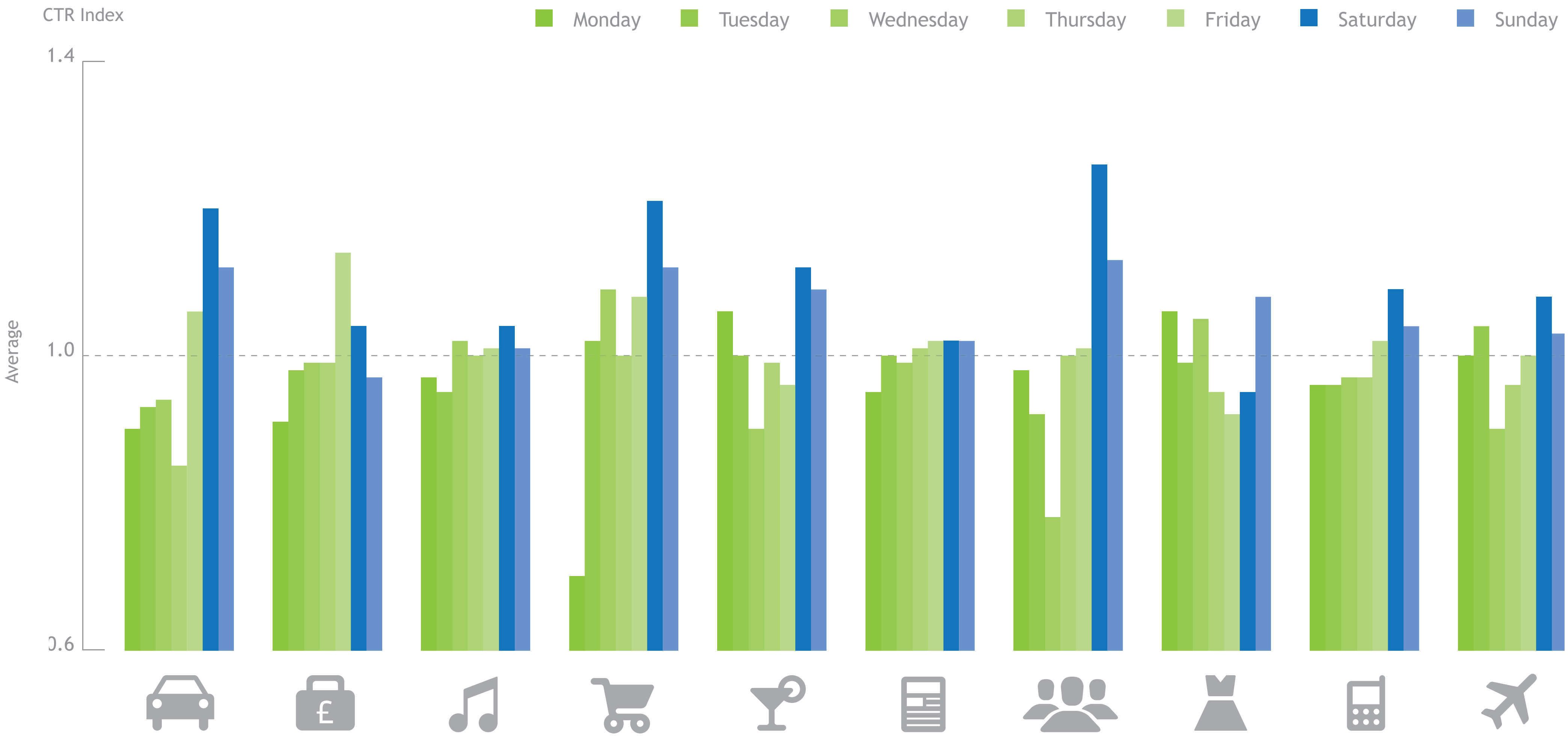
# Performance increase from time targeting

CTR rates generally peak after 6pm for Automotive (15% above average) and FMCG & Retail (20%). Style & Fashion and Lifestyle & Health achieve higher morning CTRs, and only News & Education achieves higher performance between midnight and 5am (+7%).



# Performance increase by day of the week

Performance increases on Saturdays (6% above average), in particular for Social & Dating (+26%), FMCG & Retail (+21%) and Automotive (+20%). Monday has the lowest CTR (-5%), except for Lifestyle & Health (+6%) and Style & Fashion (+6%). During the working week, Wednesday is the best day for FMCG & Retail (+9%), and the worst for Social & Dating (-22%).



# CTR Index per channel and platform

## CTR Index

| | Android | iOS | Java | RIM | Symbian |
|---|---|---|---|---|---|
| Entertainment | 1.08 | 0.86 | 1.77 | 0.26 | 1.03 |
| Games | 1.11 | 1.41 | 2.84 | 2.77 | 3.11 |
| Lifestyle | 0.74 | 1.51 | 0.47 | 0.97 | 0.66 |
| News, Sport & Information | 0.82 | 1.15 | 1.55 | 0.62 | 0.69 |
| Social Networking | 0.64 | 0.33 | 0.33 | 0.13 | 0.25 |

# eCPM Index per channel and platform

## eCPM Index

| | Android | iOS | Java | RIM | Symbian |
|---|---|---|---|---|---|
| Entertainment | 0.96 | 0.92 | 1.88 | 0.32 | 0.92 |
| Games | 1.04 | 1.62 | 3.13 | 2.74 | 3.14 |
| Lifestyle | 1.24 | 2.46 | 0.72 | 2.53 | 0.95 |
| News, Sport & Information | 0.72 | 0.96 | 1.54 | 0.48 | 0.62 |
| Social Networking | 0.43 | 0.69 | 0.35 | 0.13 | 0.23 |

# Channels & Audience

## Publisher Channels

- Entertainment
- Games
- Lifestyle
- News, Sport & Information
- Social Networking

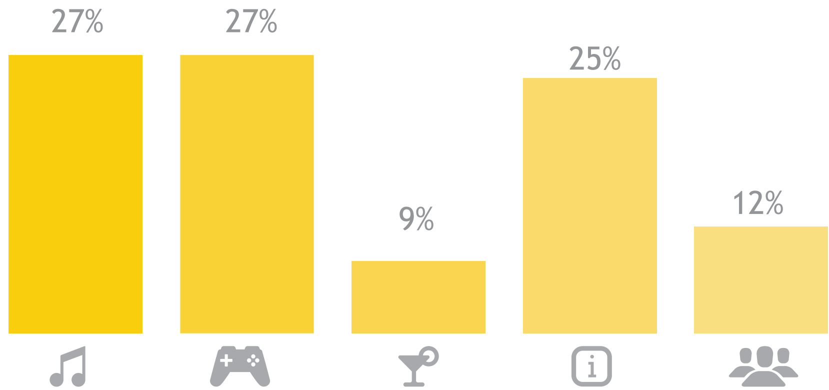
## About our demographics methodology

Adfonic uses aggregated demographics data to understand how campaigns impact on consumers, and to gain insights into how audience demographics affect performance. This report is based on samples of millions of ad requests that include demographic data provided with the user's consent.

# Audience per channel

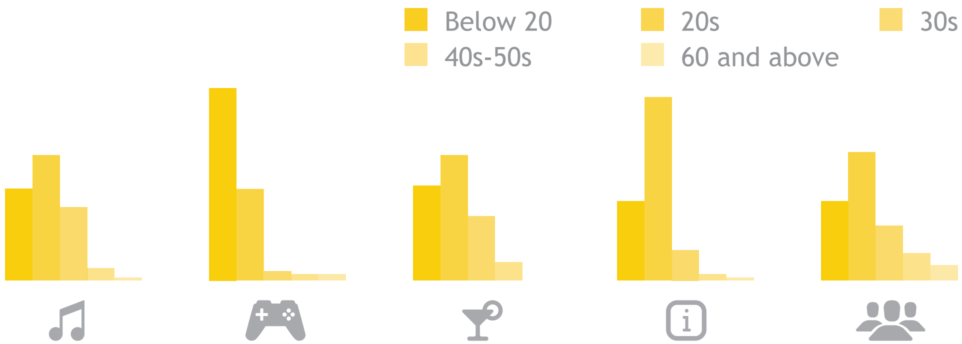
The Games channel still achieves the best CTR performance (28% above average), while social networking has the lowest (62% below). Despite an average CTR, Lifestyle delivers the highest eCPMs at 80% above average. The Games channel provides access to younger audiences, with 86% of consumers in the under 30 age group. At either end of the age ranges, those below 20 and above 60 are mostly female. The 20-59 age group is mostly male.

## Share of ad requests

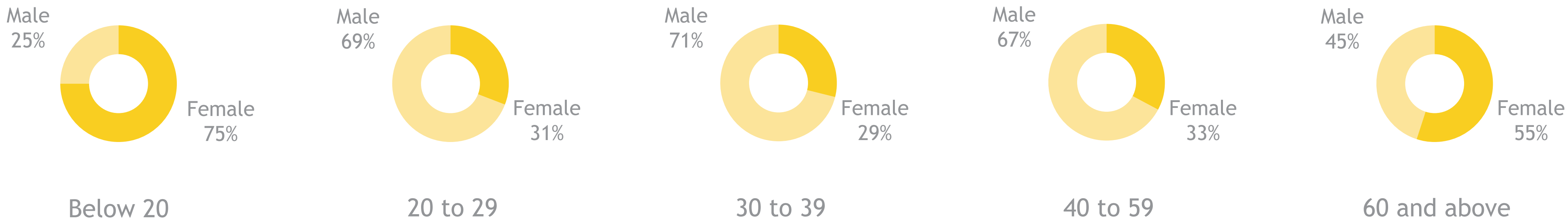



| | | | | | |
|---|---|---|---|---|---|
| CTR index | 0.98 | 1.28 | 1.04 | 0.92 | 0.38 |
| eCPM index | 0.93 | 1.31 | 1.80 | 0.80 | 0.46 |

## Ad requests per age group



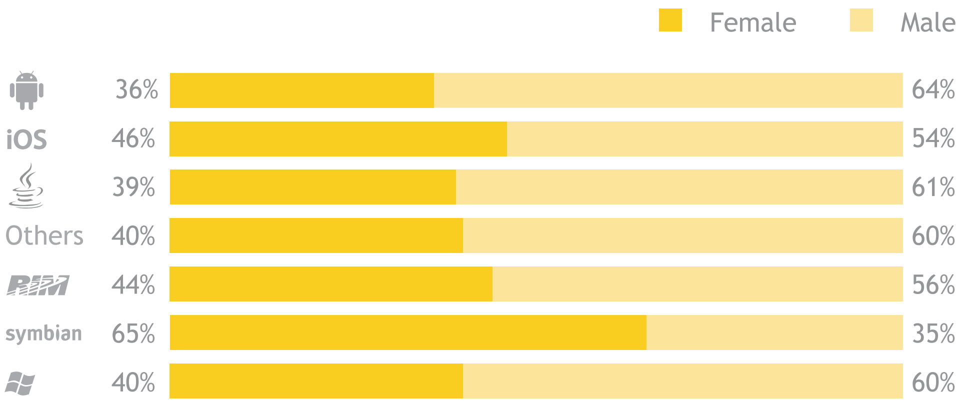

## Male audience per age group



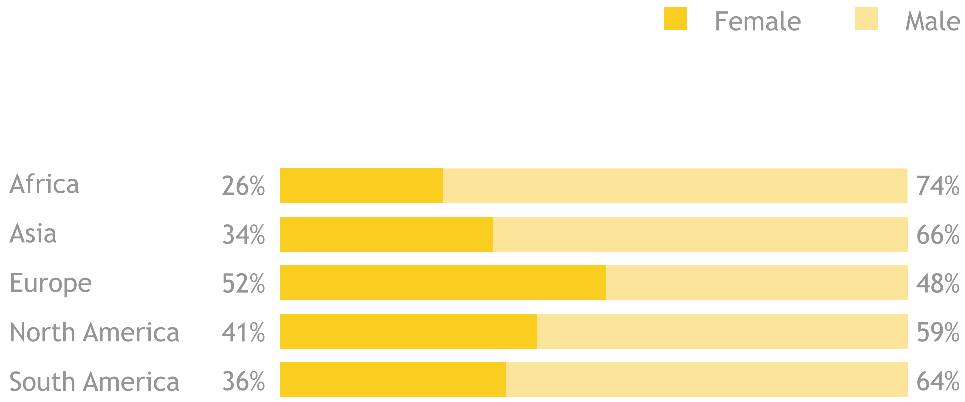
# Audience per platform, region and day part

Males account for 60% of audience on most platforms. The exception here is Symbian, where devices are more typically owned by females (+65%). Gender mix is male-biased except for Europe, where it is balanced. Males are more active in the morning, females in the evening.

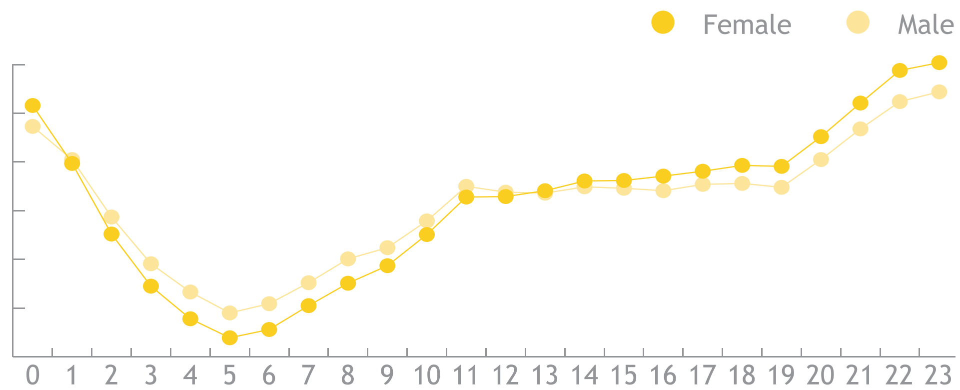
## Gender mix per platform†



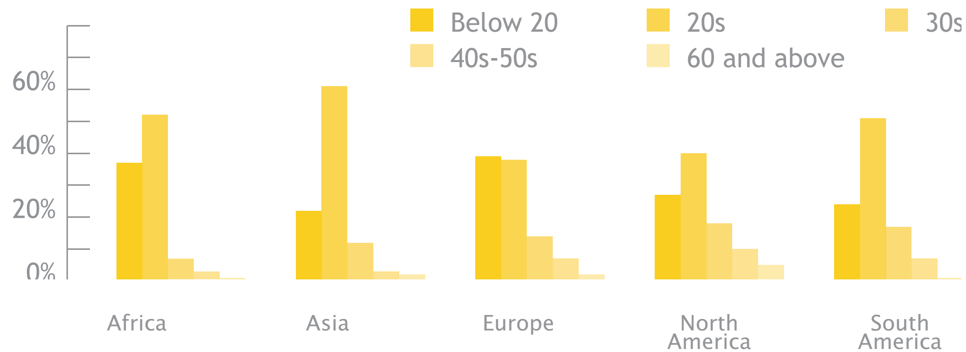

## Gender mix per region††




## Ad requests per hour by gender†††



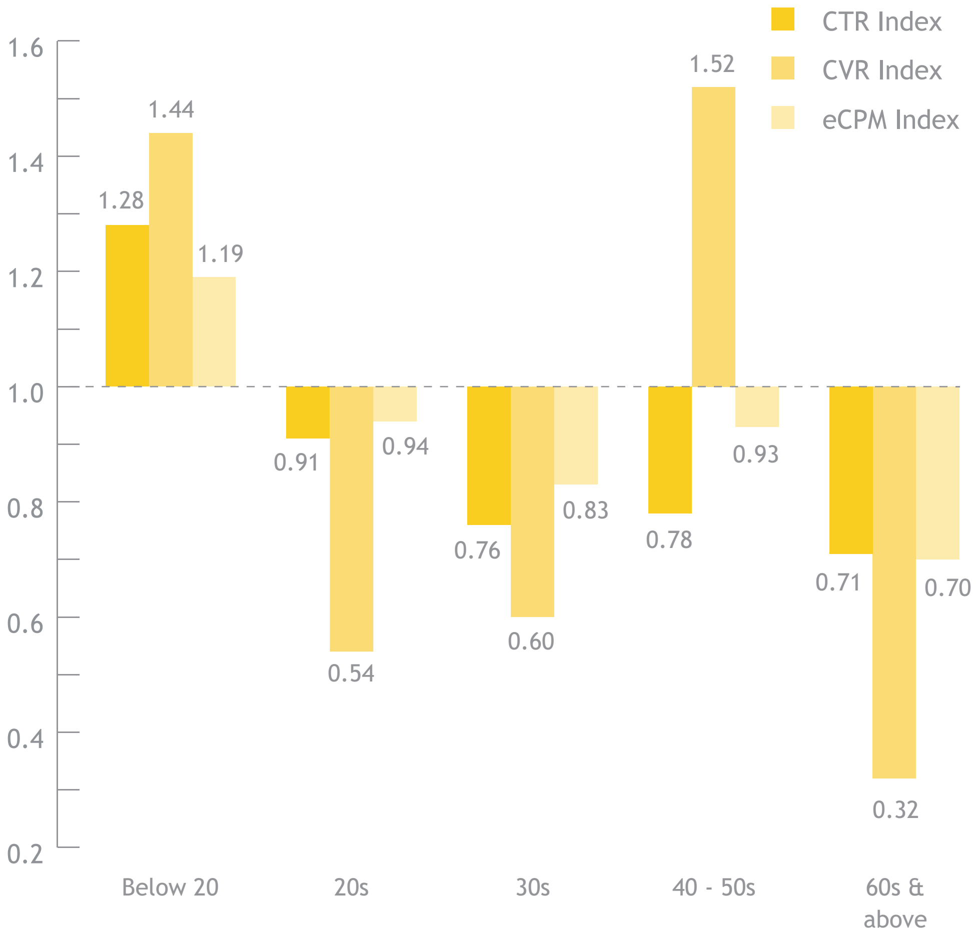

## Ad requests per age group - regional



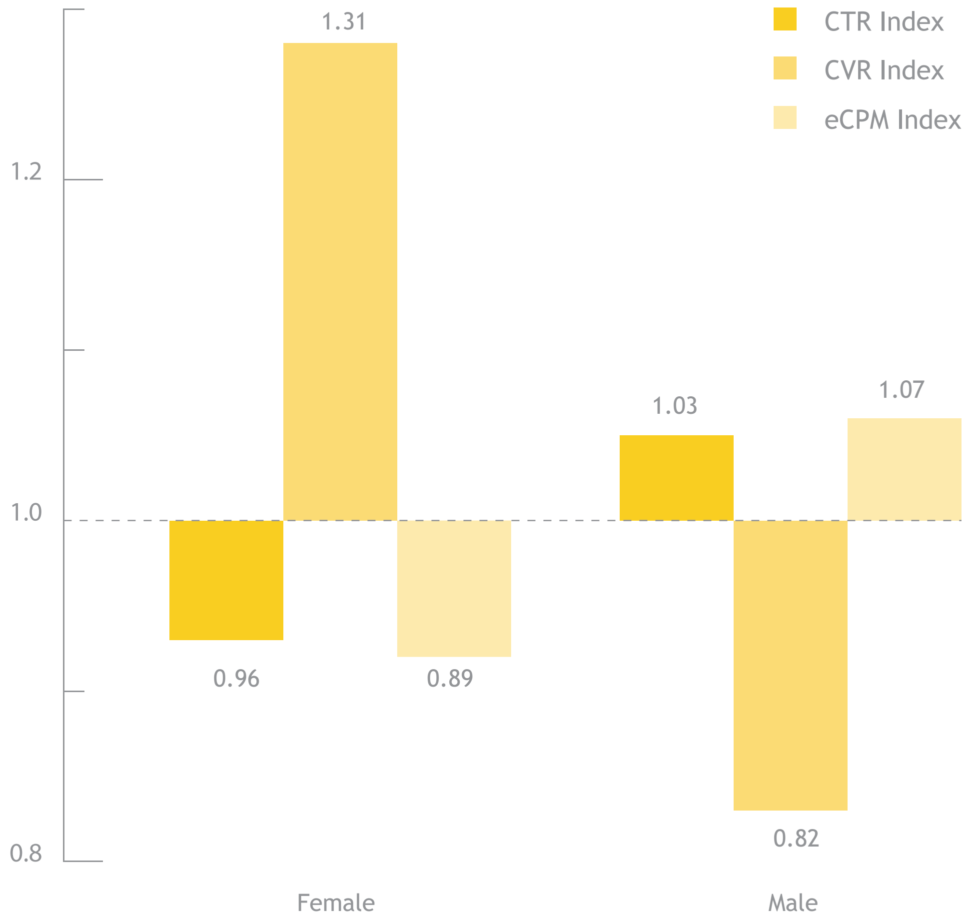
# Audience per platform, region and day part

Teenagers show the highest propensity to click (29% above average) and convert (+54%). The 40-59 group clicks less often than average (22% below) and converts more post-click (+52%). Men click 3% more often than women, but women convert 31% more frequently.

## Performance by age group†




## Performance by gender†




† North America and Europe / Android and iOS

# Performance & Targeting

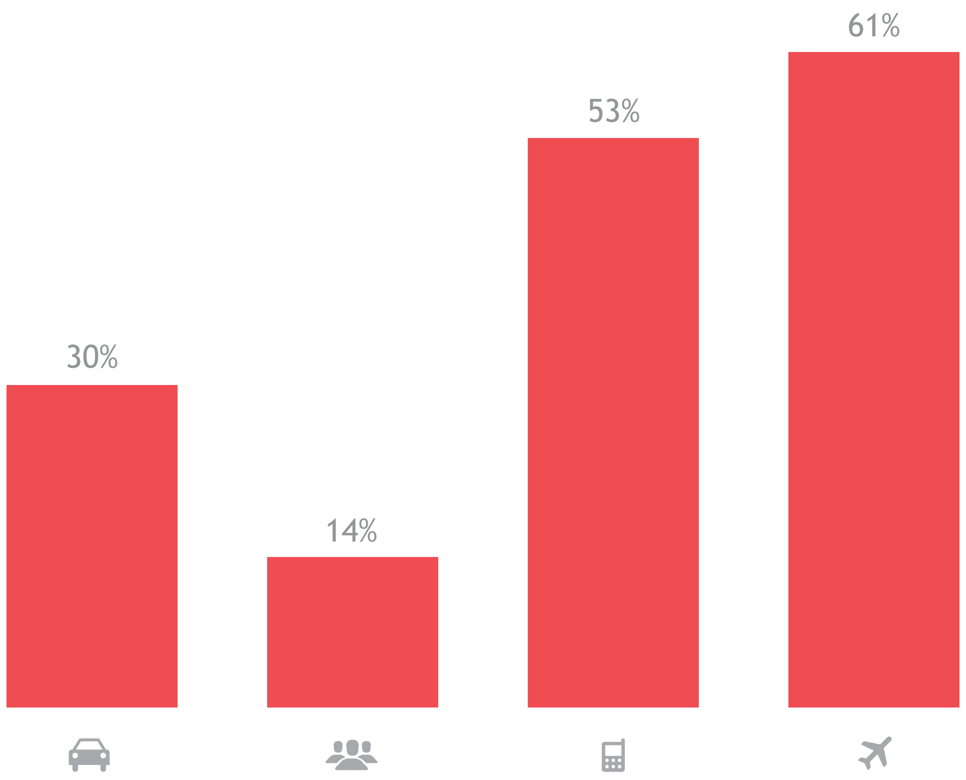
## Publisher Channels

- Entertainment
- Games
- Lifestyle
- News, Sport & Information
- Social Networking

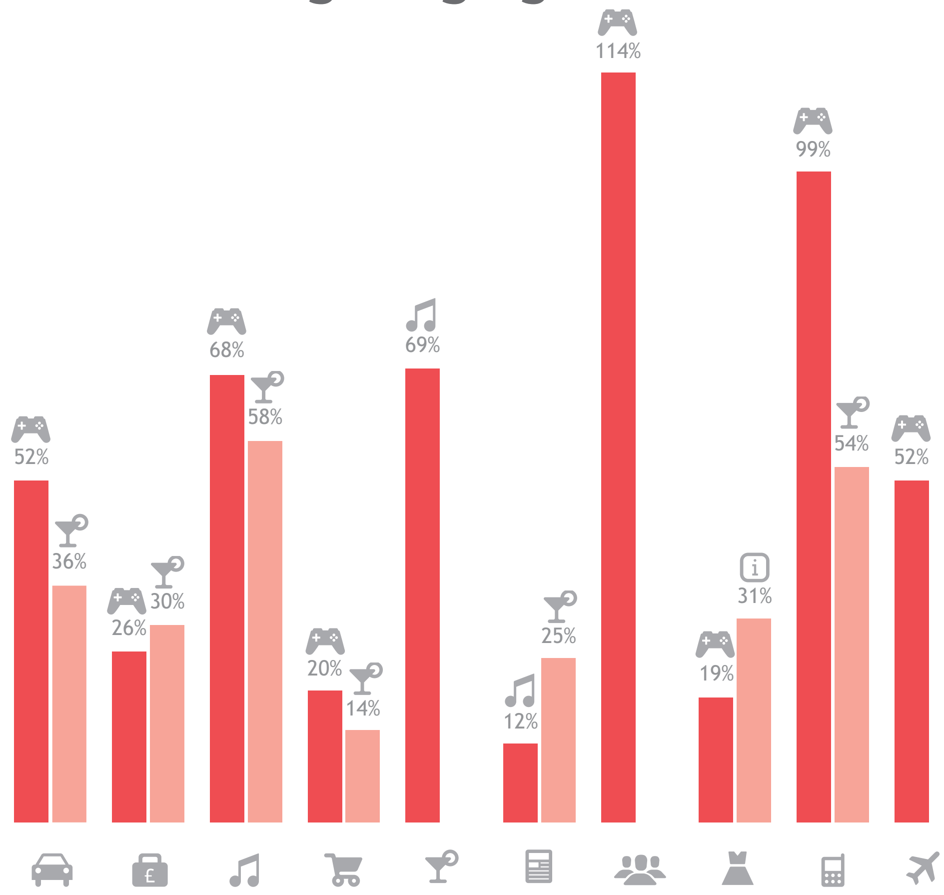
# Vertical performance

The tablet's larger real estate boosts CTRs - travel campaigns on tablets show a 61% uplift. Tech & Telecoms, Automotive and Social & Dating also perform well on tablets. The Games channel delivers most clicks, and Lifestyle, Entertainment and News deliver impressive CTR uplifts.

## CTR uplift on Tablet by vertical




## CTR uplift achievable through channel targeting by vertical



# Vertical performance

Publishers who want to monetize their inventory should aim for specific audiences to experience eCPM uplifts. News publications attracting audiences interested in Style & Fashion achieve +702% eCPM, while Social Networking publications achieve +515% eCPM when displaying FMCG & Retail advertisements.

## eCPM uplift by channel

| | AUTOMOTIVE | BUSINESS & FINANCE | FMCG & RETAIL | LIFESTYLE & HEALTH | NEWS & EDUCATION | SOCIAL & DATING | STYLE & FASHION | TECHNOLOGY & TELECOMS | TRAVEL |
|---|---|---|---|---|---|---|---|---|---|
| Entertainment | 161% | 138% | 178% | 415% | 67% | 102% | 12% | | 120% |
| Games | 264% | 73% | 103% | 34% | | 329% | 157% | 70% | 80% |
| Lifestyle | 70% | | 37% | | | | | 37% | |
| News, Sport & Information | 296% | 96% | 324% | 63% | 86% | 87% | 702% | 114% | 57% |
| Social Networking | 305% | 229% | 515% | 26% | 49% | 252% | 68% | 169% | 192% |