

# MOBILE ADVERTISING TRENDS

Learnings from our Q4 2017 Quarterly Mobile Index

As consumer behavior shifts to mobile browsing, publishers and advertisers must be poised to maximize opportunities from mobile moments.

## DEMAND FOR QUALITY FUELS SUSTAINED MOBILE PMP GROWTH

Majority of CMOs worldwide facing pressure to gain tighter **ad controls**<sup>[1]</sup>

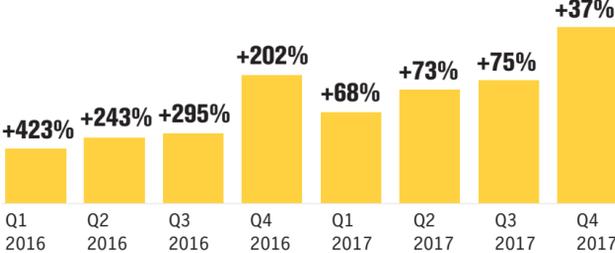
**BRAND SAFETY**

**INVENTORY QUALITY**

**AD FRAUD**

**VIEWABILITY**

Mobile PMP volume has risen YOY for eight quarters in a row

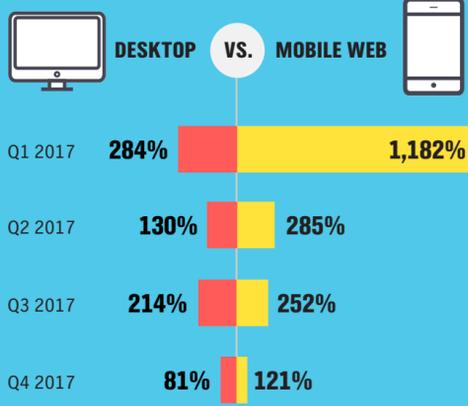


PMPs offer significantly higher eCPMs than open exchange for high quality mobile inventory



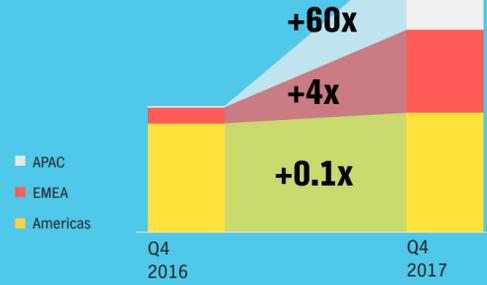
## HEADER BIDDING APPROACHING MATURITY WITH GLOBAL REACH

YOY growth rate declines as mobile header bidding market matures, narrowing platform gap



**72%** of the top 1,000 US publishers used header bidding in December 2017<sup>[2]</sup>

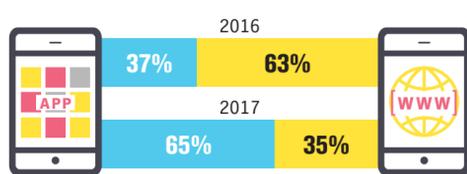
Majority of mobile web header bidding impressions monetized outside the Americas



## APP VOLUME SOARS AS CONSUMPTION PATTERNS SHIFT

**88%** of the time US consumers spend on mobile devices is devoted to apps —nearly 2.5 hours per day<sup>[3]</sup>

Apps doubled their share of mobile volume in 2017

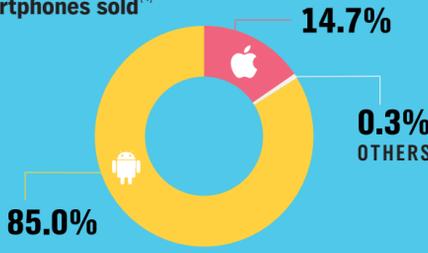


while mobile web eCPMs earned a premium over apps



## ANDROID BUILDS DOMINANT APP LEAD

Android and iOS power nearly all smartphones sold<sup>[4]</sup>



Android volume expanded at a triple-digit rate in 2017



Now representing roughly eight-in-ten monetized mobile app impressions



iOS continues to earn higher eCPMs in 2017



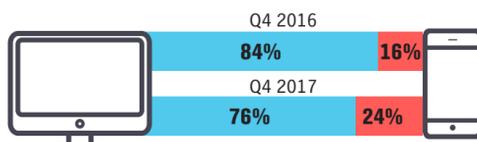
## BRAND AD SPEND DECISIVE FOR MOBILE VIDEO GROWTH

YouTube scandal caused mobile video volume retreat in Q2

Added safeguards brought back trust & growth



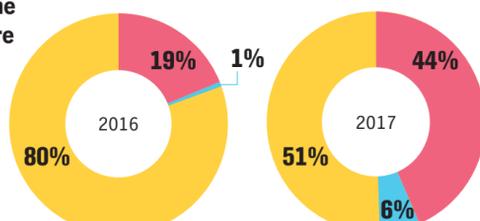
Mobile video volume growth outpaced desktop to expand share



**83%** of advertisers plan to increase video ad spend<sup>[5]</sup>

EMEA experienced the greatest market share improvement YOY

APAC  
EMEA  
Americas



## MOST GLOBAL MOBILE MONETIZATION PROFILE YET

In 2017, all regions had minority portions of monetized mobile\* impressions for the first time



Average mobile\* eCPMs improved most in the Americas

**+16%** YOY eCPM CHANGE

**-12%** YOY eCPM CHANGE

**+1%** YOY eCPM CHANGE

**+7%** WORLDWIDE YOY eCPM CHANGE

\*including mobile web and app

[1] "Brand Protection From Digital Content Infection — Safeguarding Brand Reputation Through Diligent Ad Channel Selection," CMO Council and Dow Jones, September 2017

[2] "Header Bidding Industry Index," ServerBid, January 2018

[3] "2017 Retrospective," App Annie, January 2018

[4] "Quarterly Mobile Tracker — Smartphone OS Market Share, 2017 Q1," International Data Corporation (IDC), May 2017

[5] "Digital Video Insights," AOL Advertising, now an Oath subsidiary, April 2017