

Monetization of Mobile Traffic

Media Finance Focus

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Time Spent with Media (2009 - 2012)

Average Time Spent per Day with Major Media by US Adults, 2009-2012

minutes

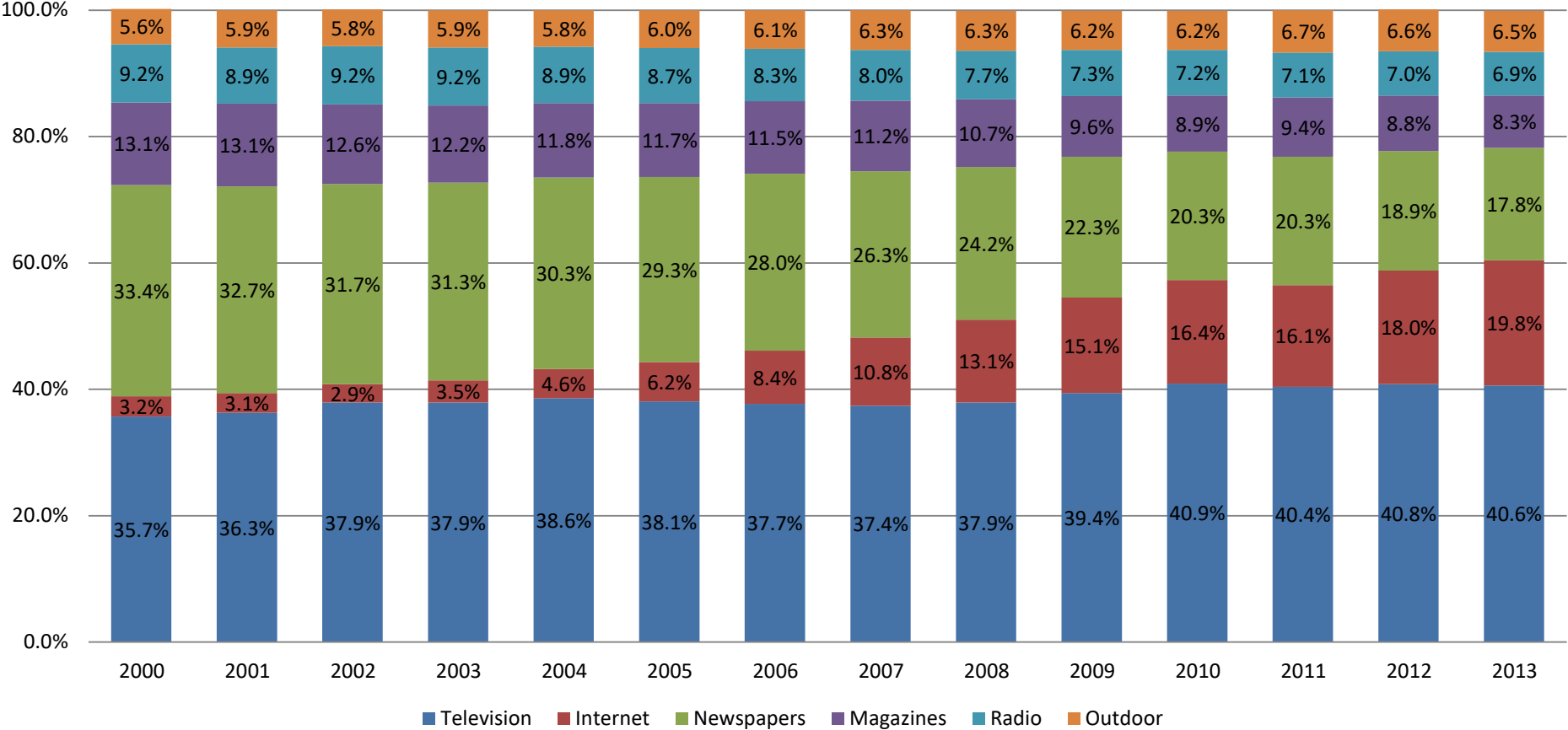
	2009	2010	2011	2012
TV	267	264	274	278
Online	146	155	167	173
Radio	98	96	94	92
Mobile (nonvoice)	22	34	54	82
Print*	55	50	44	38
—Newspapers	33	30	26	22
—Magazines	22	20	18	16
Other	44	47	45	36
Total	632	646	678	699

Note: time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking on a PC while watching TV is counted as 1 hour for TV and 1 hour for online;

**offline reading only*

Source: eMarketer, Oct 2012

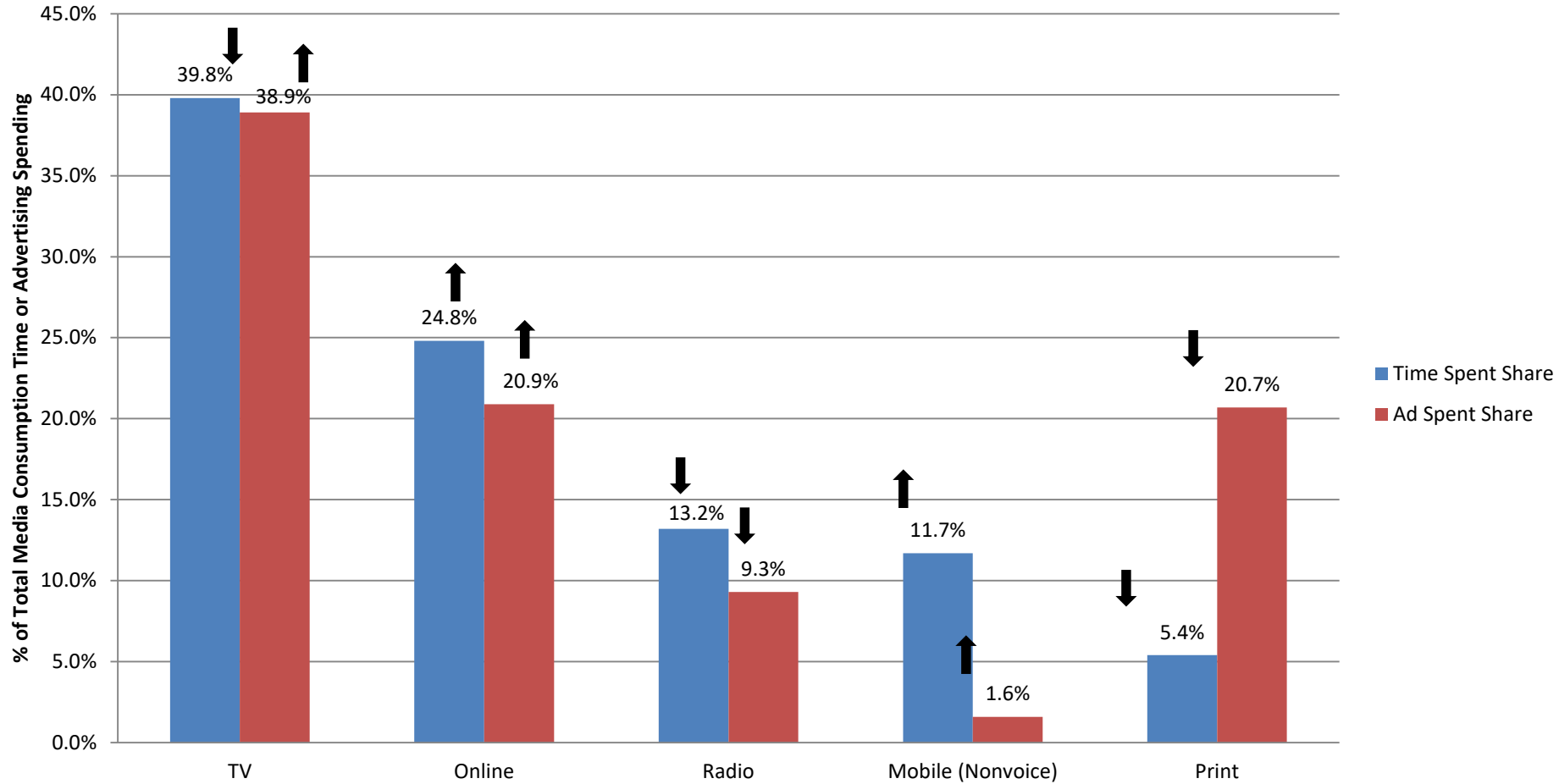
Advertising Revenue by Segment



Source: eMarketer and Wall Street Research.

% Time Spent vs. % Ad Spend

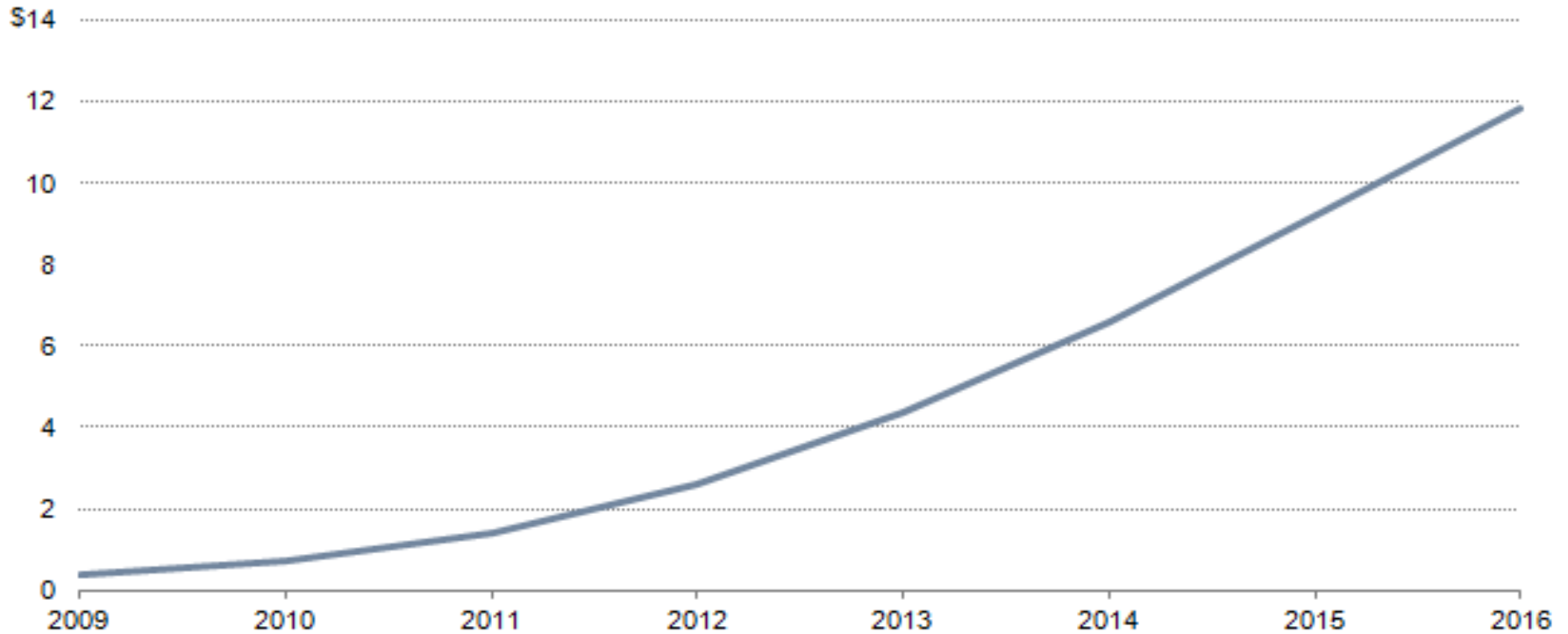
% Time Spent vs. % Ad Spend



Mobile Ad Revenue Growth – Historical and Forecast

Mobile Ad Revenue Grows in 2012

In Billions of Dollars



Source: eMarketer. "US Ad Spending Forecast." October 2012.

Note: Figures for 2013-2016 are forecasts.

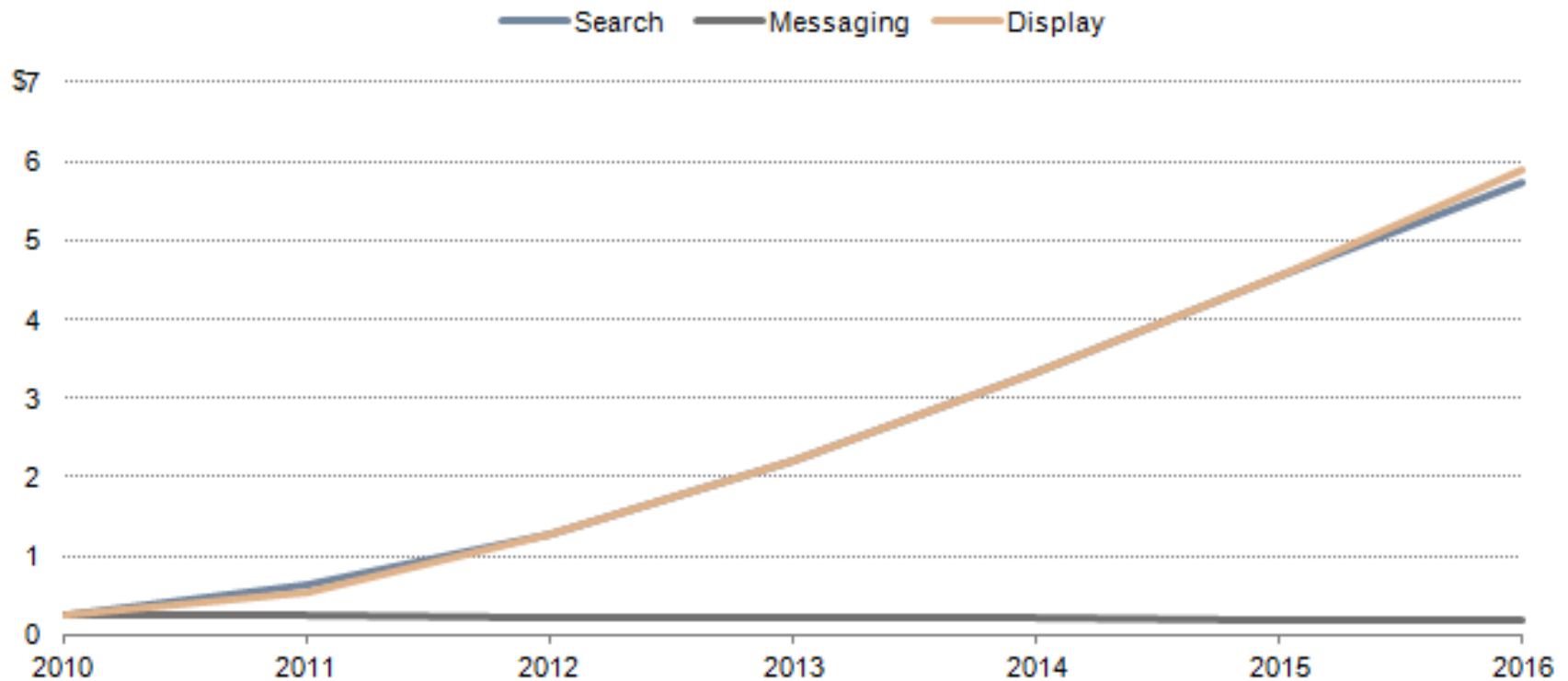
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Components of Mobile Ad Revenue

Mobile Search and Display Grow Equally

In Billions of Dollars



Source: eMarketer. "US Ad Spending Forecast." October 2012.

Note: Figures for 2013-2016 are forecasts.

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Mobile Ad eCPMs by Device Platform

Estimated Cost Per Impression (eCPM) Rates for Mobile Platforms

	eCPM
iOS	\$1.64
iPhone	1.48
iPad	4.42
Android	0.88
RIM (BlackBerry)	1.06

Source: Opera. "State of Mobile Advertising, Q3 2012."

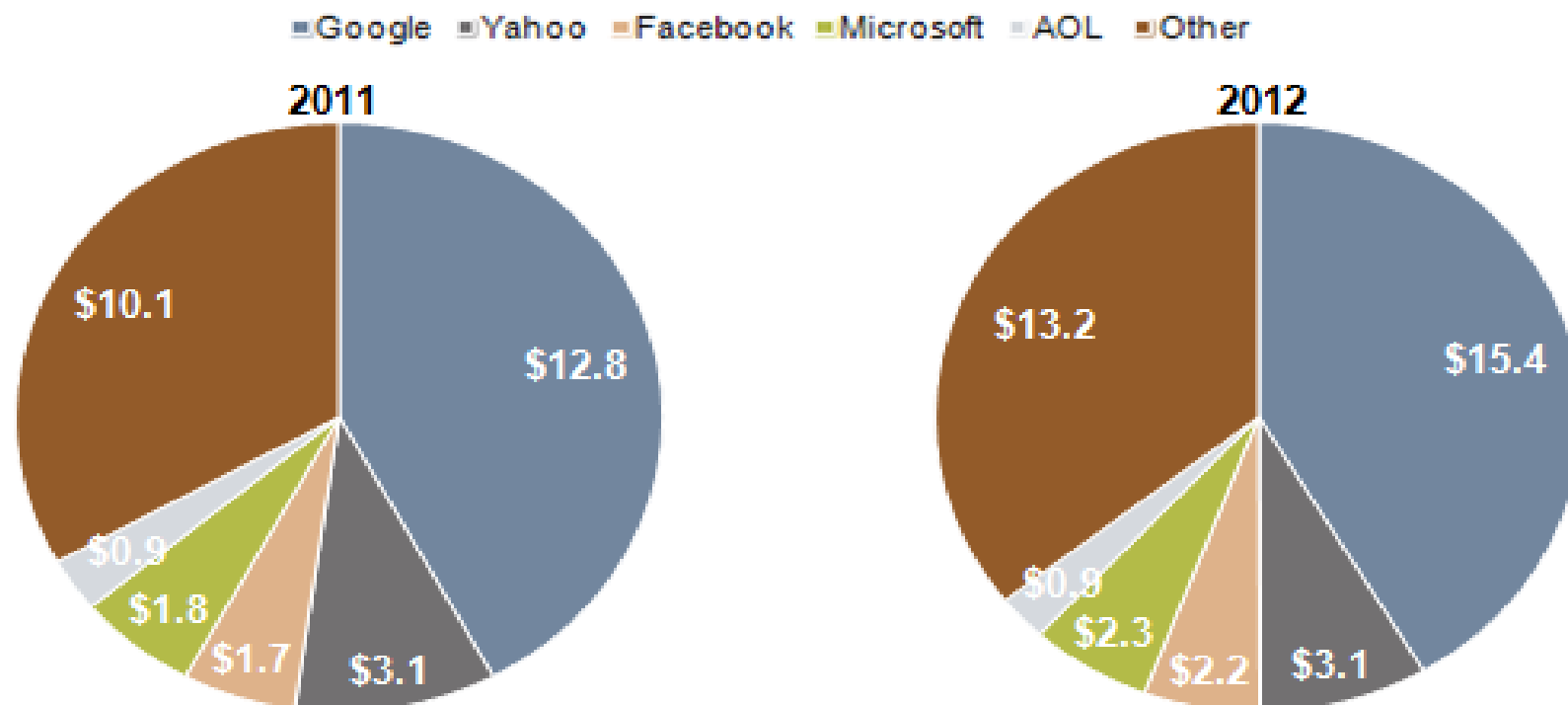
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Digital Advertising Share of Market

Five Companies Continue to Dominate Digital Advertising

In Billions of Dollars



Source: eMarketer. "US Ad Spending Forecast." October 2012.

Note: Mobile is a subset of digital.

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Newspaper Industry vs. Google

USA TOTAL NEWSPAPER PRINT + ONLINE REVENUE vs. GOOGLE USA REVENUE

