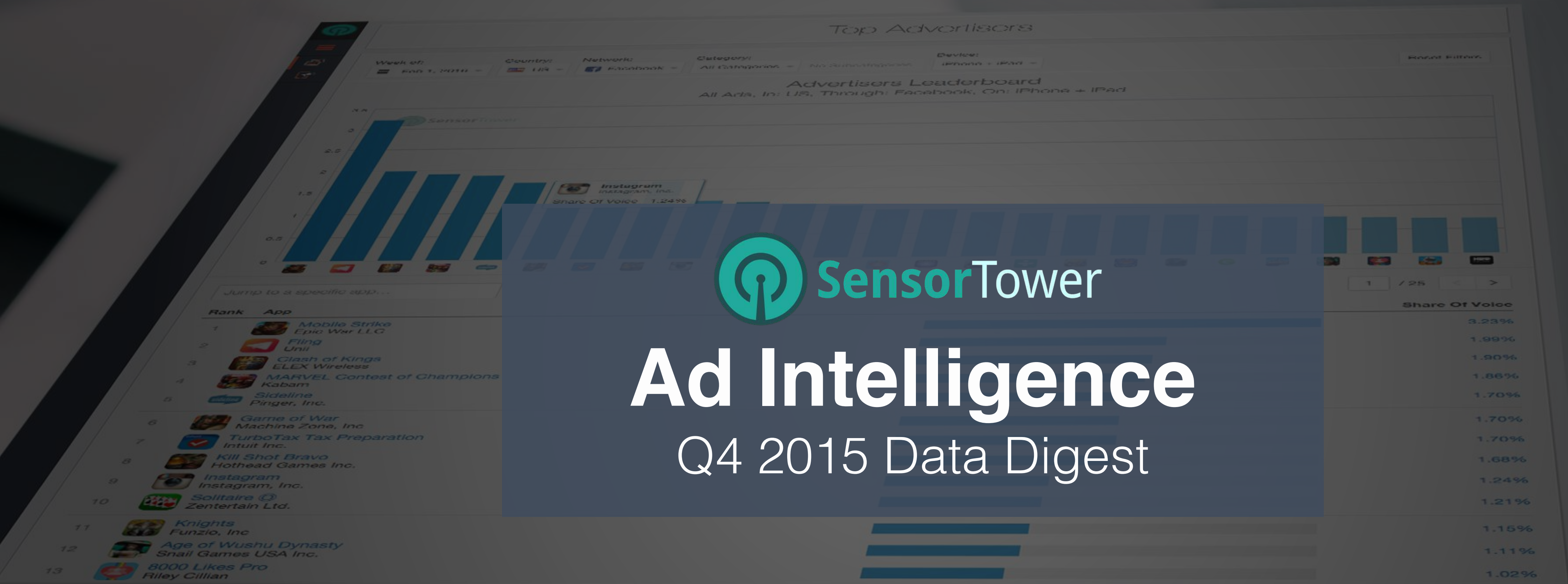




# Ad Intelligence

## Q4 2015 Data Digest



# Key Highlights

Click on the Page Number to Jump There

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In the Q4 2015 **Ad Intelligence Data Digest**,  
you'll learn more about:



Facebook saw substantial growth in mobile video ads during Q4 2015. [\(pg. 10\)](#)



Amazon pushed its entire mobile portfolio heavily ahead of the holiday season. [\(pg. 14\)](#)



Despite growth in mobile app install campaigns, mobile web still lead on Pinterest. [\(pg. 3\)](#)



iAd began to decline—we examine network impressions for the past 10 months. [\(pg. 4\)](#)



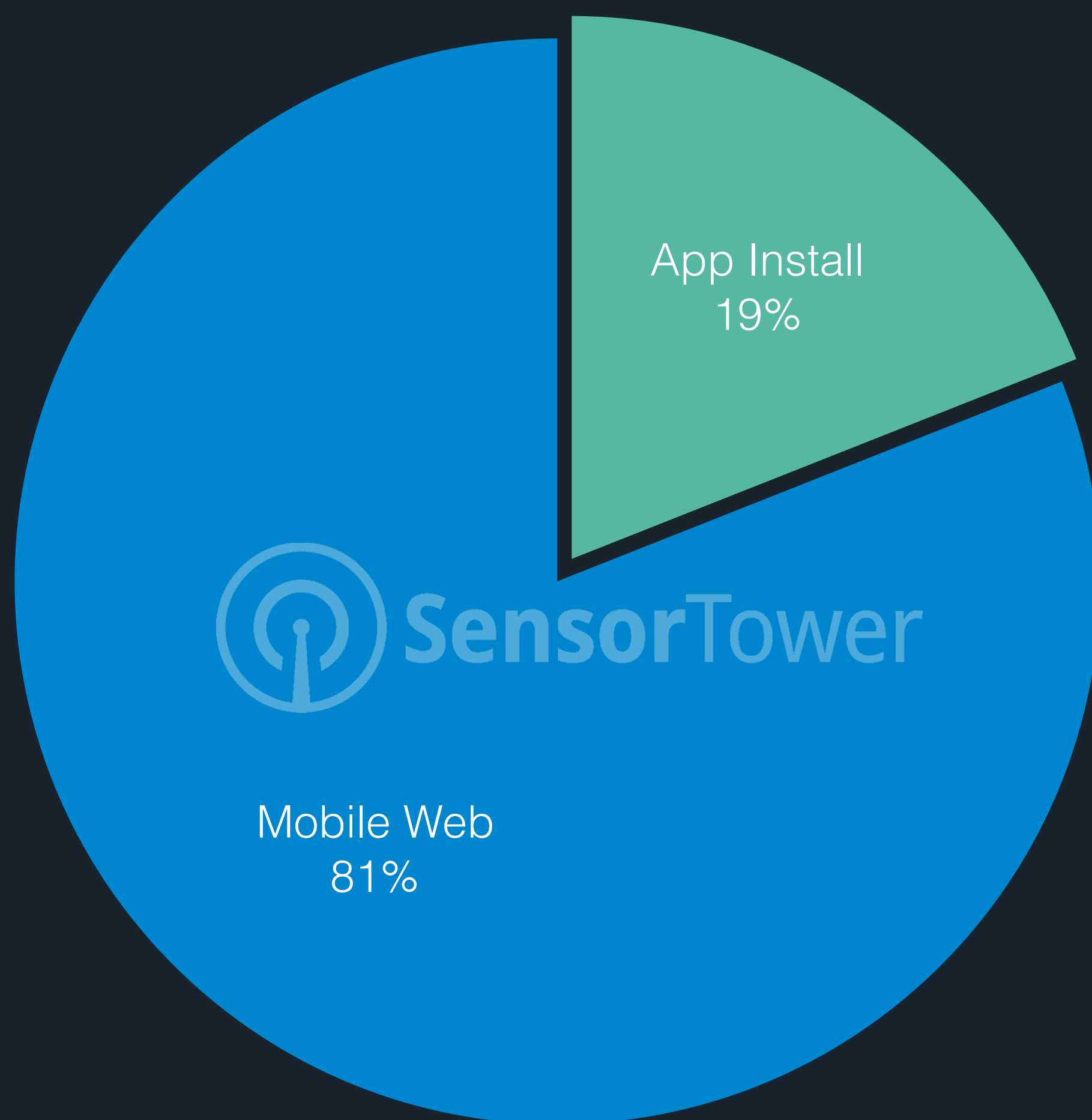
Wish continued its Q3 dominance on Facebook and remained the No. 1 advertiser. [\(pg. 13\)](#)



# Mobile Web Campaigns Still Dominate

*Pinterest*

Percent of App Install vs. Mobile Web Campaigns

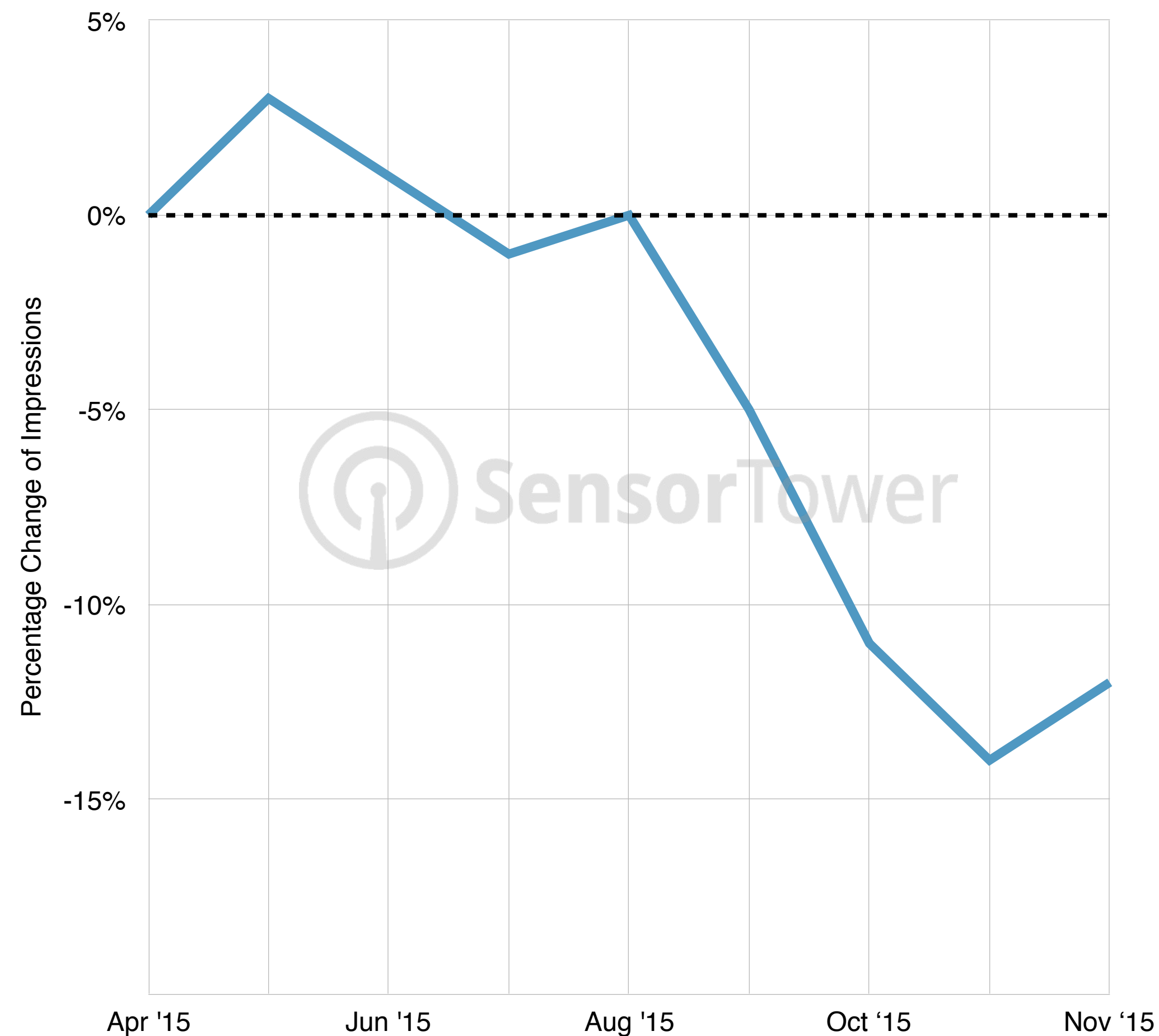


## App Install Campaigns Gained Steam

App Install advertisers are growing across all networks as more companies enter the app ecosystem. Despite this trend, ads driving traffic to mobile web remained dominant on Pinterest. Tumblr, Etsy, and Macy's were among the top app install advertisers in Q4 2015.

# iAd Slides into the Sunset

Decline in iAd Impressions Worldwide Since April 2015



## Privacy Focus Alienated Advertisers

Apple has announced that it will sunset the iAd network in June of this year. The chart to the left illustrates the percentage change in monthly impressions captured on Sensor Tower's Ad intelligence product since April 2015.

Part of the dip you see starting in September 2015 is due to Apple's introduction of content blocking capabilities in iOS 9. While this only affected ads on mobile web, it did not convey confidence that Apple had advertisers' best interests in mind.

Apple's continued focus on privacy drove away some publishers on iAd.

# Contents

What's Inside our Q4 2015 Ad Intelligence Data Digest

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Click on an icon to jump to the section:



## Facebook Insights

We take a deep dive into the top publishers and trends on the world's largest mobile advertising network.



## Top Advertisers

See the top 20 app install advertisers on six of the largest mobile ad networks during 2015's fourth quarter.



## Top Creatives

Find out which creatives resonated most with users on three of the most popular mobile ad networks.

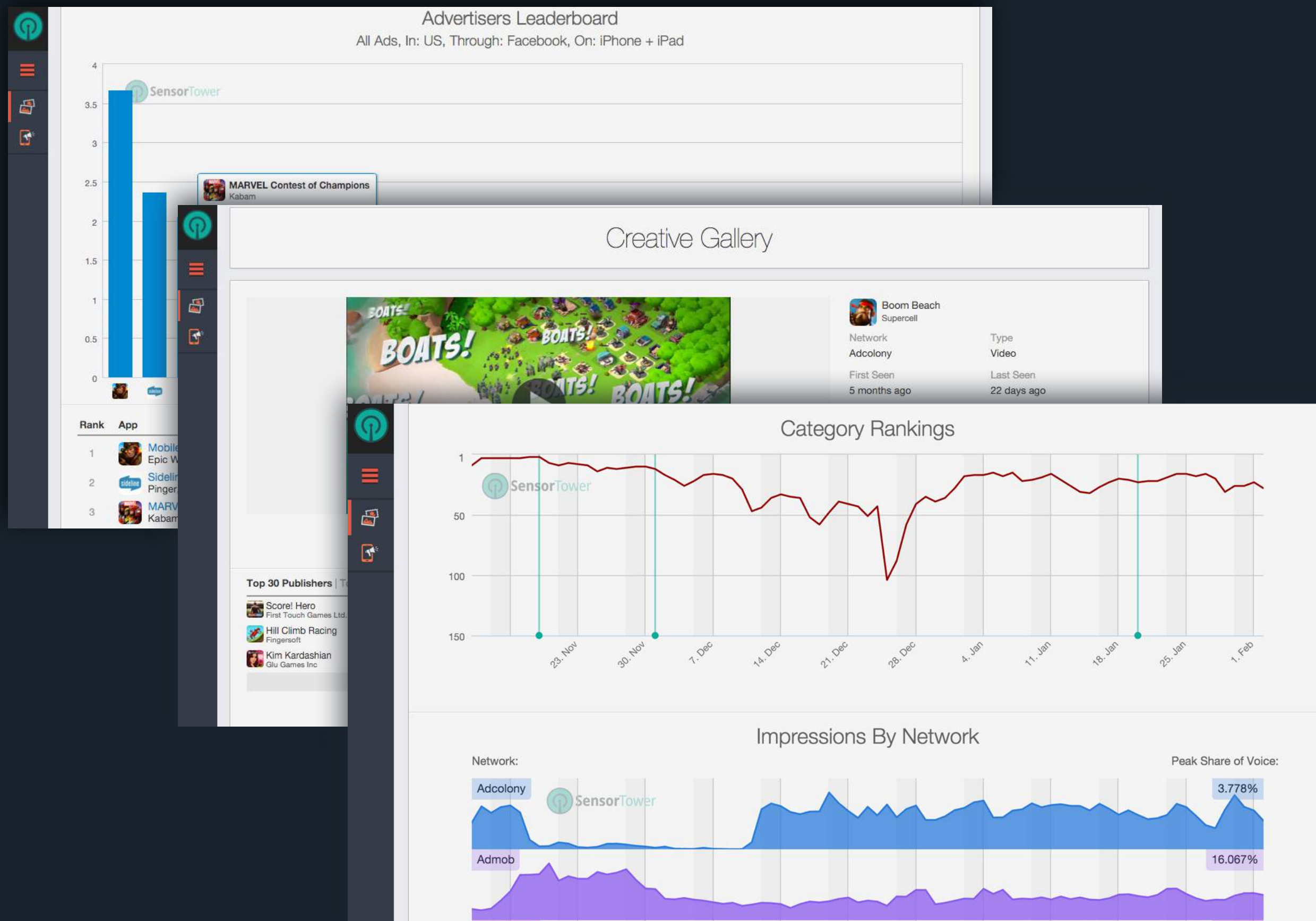


## Creative Trends

Learn about the most prominent new creative strategies employed by advertisers during the quarter.

# Welcome to the Ad Intelligence Digest

Brought to you by Sensor Tower



When we launched the [Sensor Tower Ad Intelligence](#) platform last fall, our goal was to provide mobile marketers with an unprecedented ability to peer behind the curtain of mobile advertising and elevate their campaigns using the insights it surfaced.

Included in this first edition of our Quarterly Data Digest for Ad Intelligence are advertiser leaderboards, macro trends, and other valuable insights developed using the data we've collected during the platform's first three months of availability.

If you're not yet empowering your marketing efforts with our platform, this is just a taste of what Ad Intelligence can offer.

As always, we're extremely open to feedback, so let us know what you'd like to see in future editions of this digest.

Thanks for reading!

The Sensor Tower Team



# About Our Data and Platform

The Sensor Tower Data Science Team compiled the data provided in this digest using the [Sensor Tower Ad Intelligence platform](#).

Figures represented in this report come from Ad Intelligence data for October 1, 2015 through December 31, 2015.

## **About the Solution: Ad Intelligence**

By tracking ads as they're delivered to actual people, Ad Intelligence accurately measures the world of mobile advertising and reports on key impression metrics, such as Share of Voice and Daily Network Rank. It also helps advertisers understand where their competitors are advertising and shows the creative and messages that were embedded in each advertising campaign. Ad Intelligence's mobile advertising data is driven by its panelists: millions of mobile users from around the globe.

*Would your business benefit from access to Ad Intelligence insights and the data used to build this report? See the top advertisers on more than 20 ad networks. Email [sales@sensortower.com](mailto:sales@sensortower.com) for more information.*

# Facebook Insights

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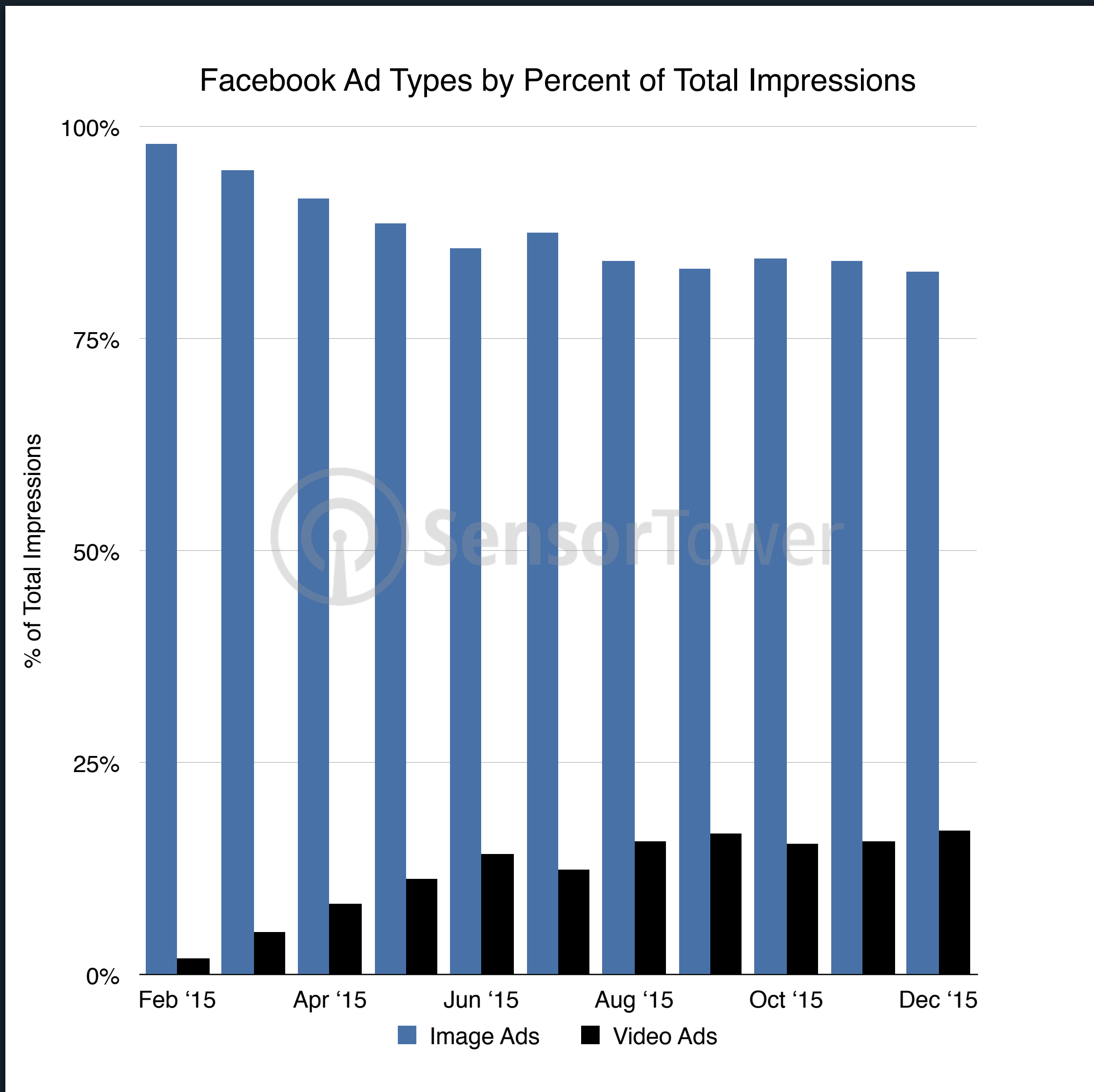
# Top Facebook Publishers



## Inside the Facebook Audience Network

These are a few of the top publishers in the fourth quarter of 2015 on the Facebook Audience Network (FAN). It's important to note that the FAN only represented a small portion of total impressions on Facebook; more than 90 percent of the total impressions were native ads seen in the Facebook application with the remaining portion being published by the FAN apps.

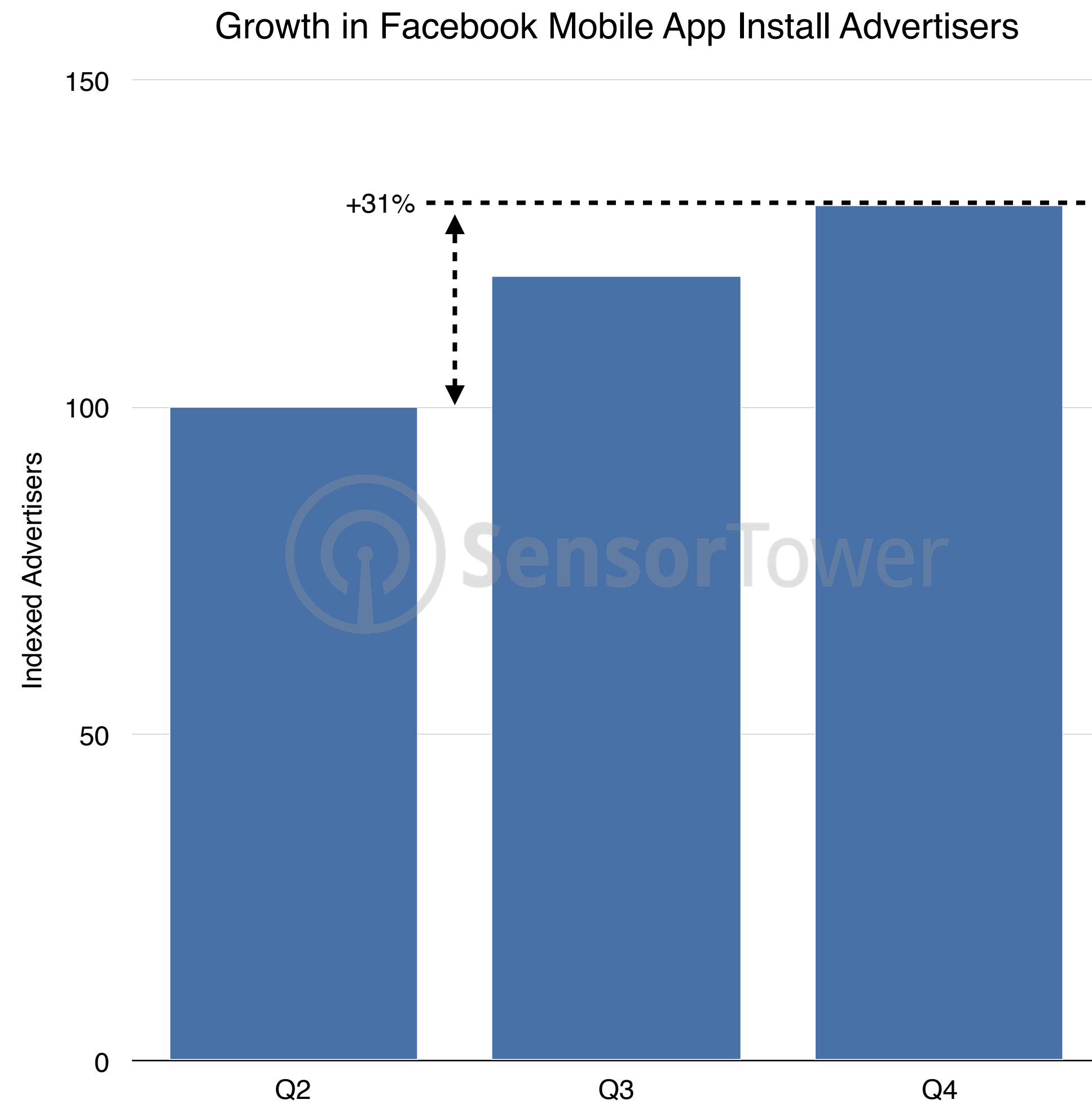
# Share of Image vs. Video Ads on Facebook



## More Advertisers Turned to Mobile Video

Mobile video impressions continued to grow during the fourth quarter of 2015 as advertisers experimented with video in place of image ads. On Facebook, where the ROI is high, advertisers are willing to spend more to produce a video creative if it means more conversions. We expect to see video ads continue their growth in early 2016.

# Mobile App Advertiser Growth on **Facebook** by Quarter



## Mobile Advertisers Grew Steadily

The total number of App Install Advertisers on Facebook grew in Q4, but not by as much as it did in Q3. The slower growth rate could be attributed to competition around the holidays as the cost of advertising peaks in these months. The higher CPIs deterred new advertisers from entering the advertising market on Facebook.



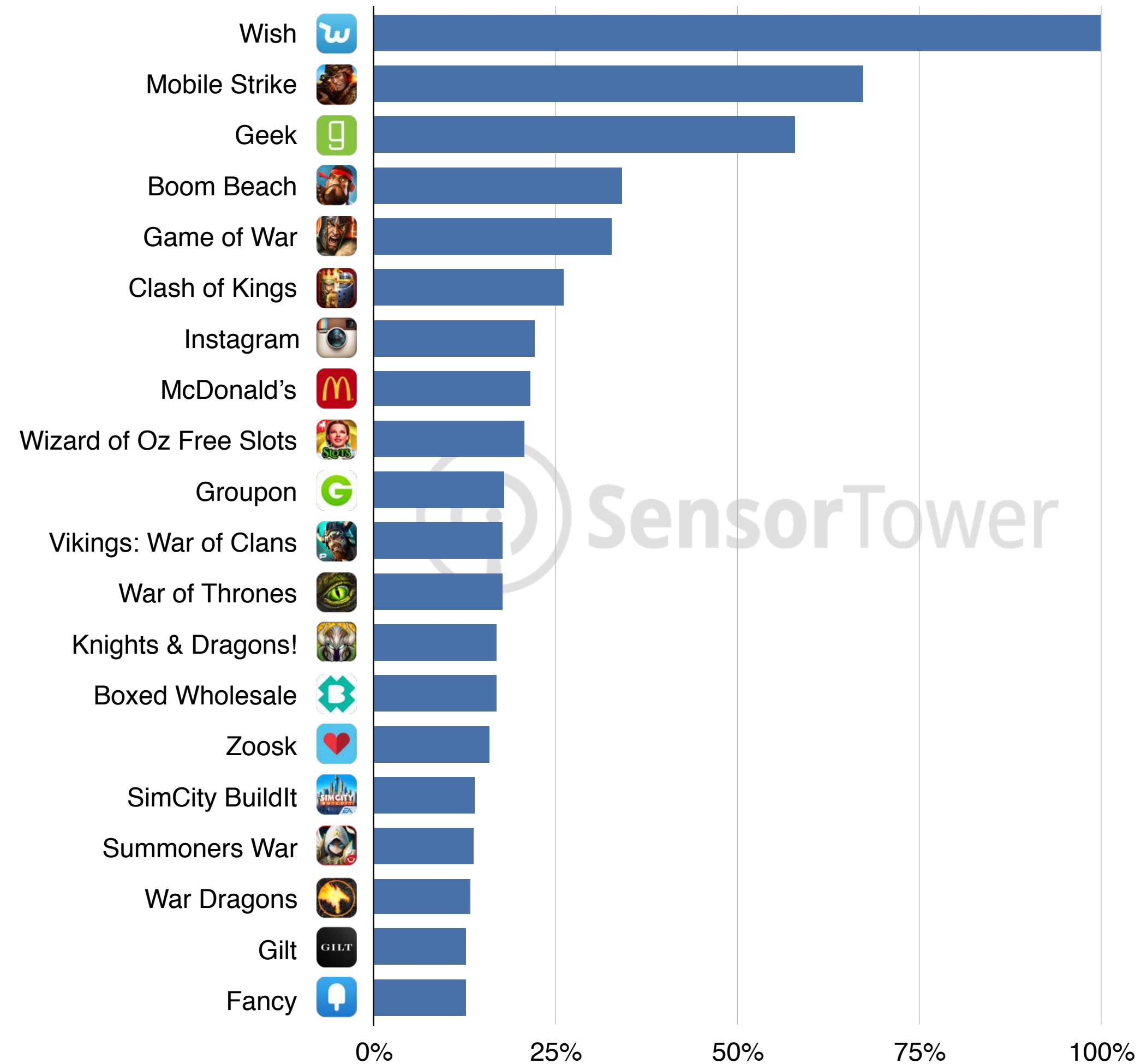
# Top Advertisers

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# Top 20 Facebook Advertisers

Facebook Advertisers by Indexed Impressions - United States



## Wish Continued Its Push on Facebook

Wish was the top Facebook advertiser in Q3, and Q4 was no different as it continued to challenge Amazon.

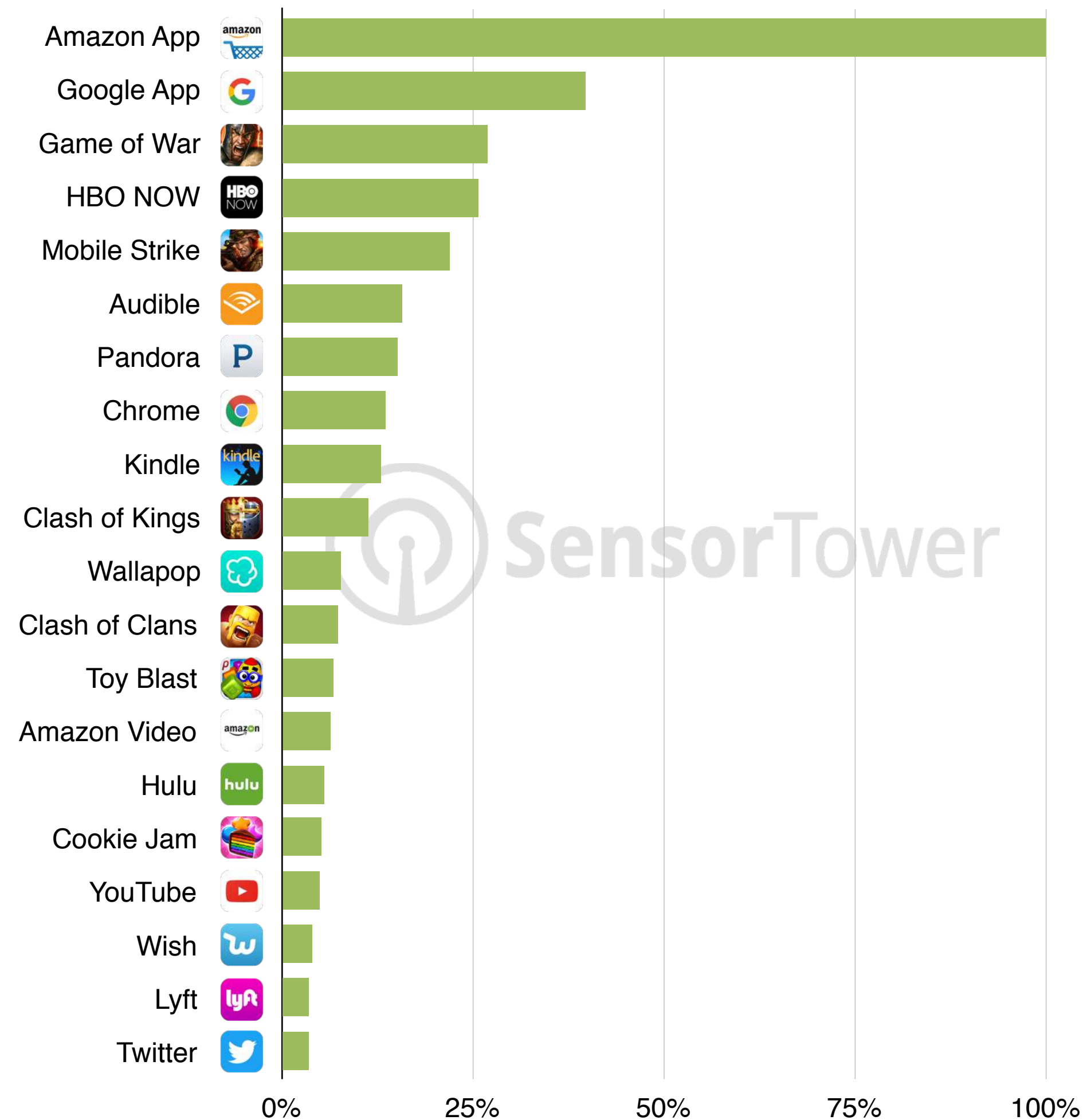


## Epic War Launched Mobile Strike

Just as it did with Game of War, Machine Zone and its new Epic War division reached each network's top 10.

# Top 20 AdMob Advertisers

AdMob Advertisers by Indexed Impressions - United States



## Amazon Bought Out Google Inventory

The flagship Amazon App saw three times the impressions of the next largest advertiser, Google itself.



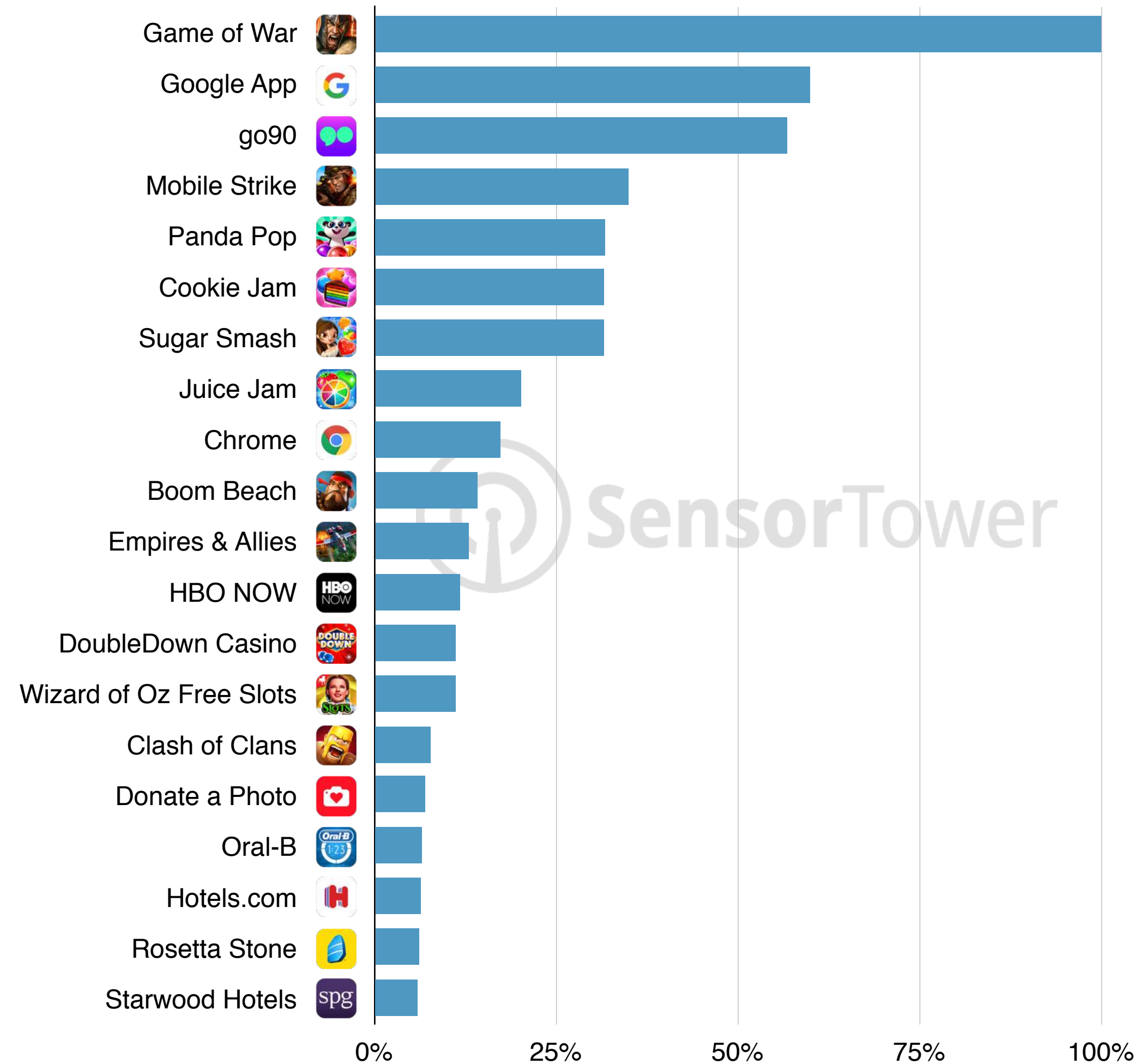
## Ads Were a Big Part of HBO's Success

Streaming apps like HBO NOW and Hulu climbed the revenue charts in Q4 driven by strong ad campaigns.



# Top 20 iAd Advertisers

iAd Advertisers by Indexed Impressions - United States



## Games: More Than Half of the Top 10

Zynga, Machine Zone, and Supercell lead the charge on iAd in the United States with Game of War on top.

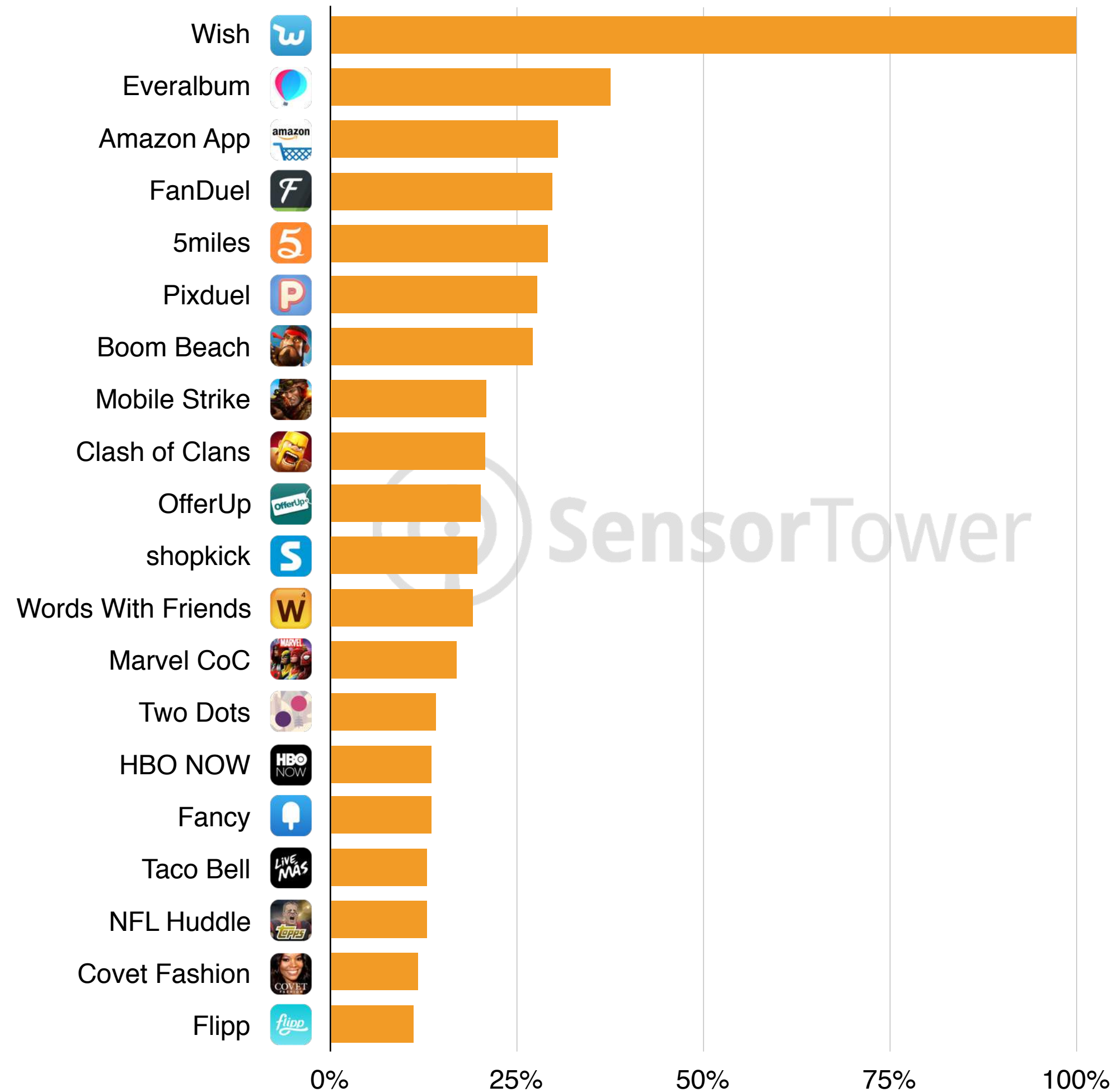


## Mobile Strike in the Top Five

Impressions for Machine Zone's latest title were 35% of the top advertiser in the U.S., its own Game of War.

# Top 20 Instagram Advertisers

Instagram Advertisers by Indexed Impressions - United States



## FanDuel Strong Before Legal Issues

FanDuel hasn't been advertising since mid-October, but its initial blast rocketed the app into the top 10.

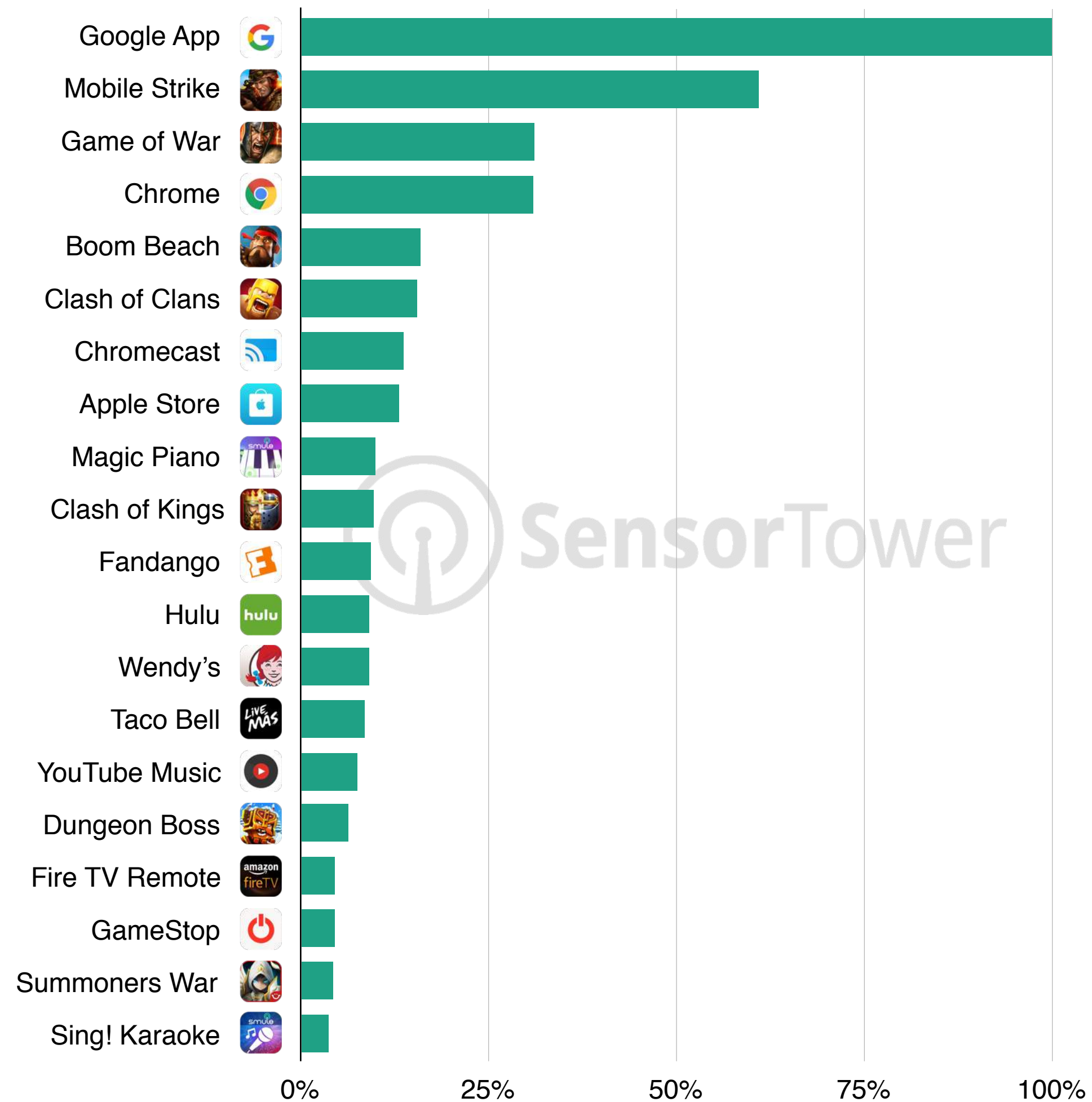


## Shopping Apps Found Success

Wish, Amazon, Shopkick, and others competed with the top gaming advertisers on this newer network.

# Top 20 YouTube Advertisers

YouTube Advertisers by Indexed Impressions - United States



## YouTube Drove Growth for Taco Bell

Taco Bell really took off in Q4 on the App Store as it re-branded and started tapping into mobile.



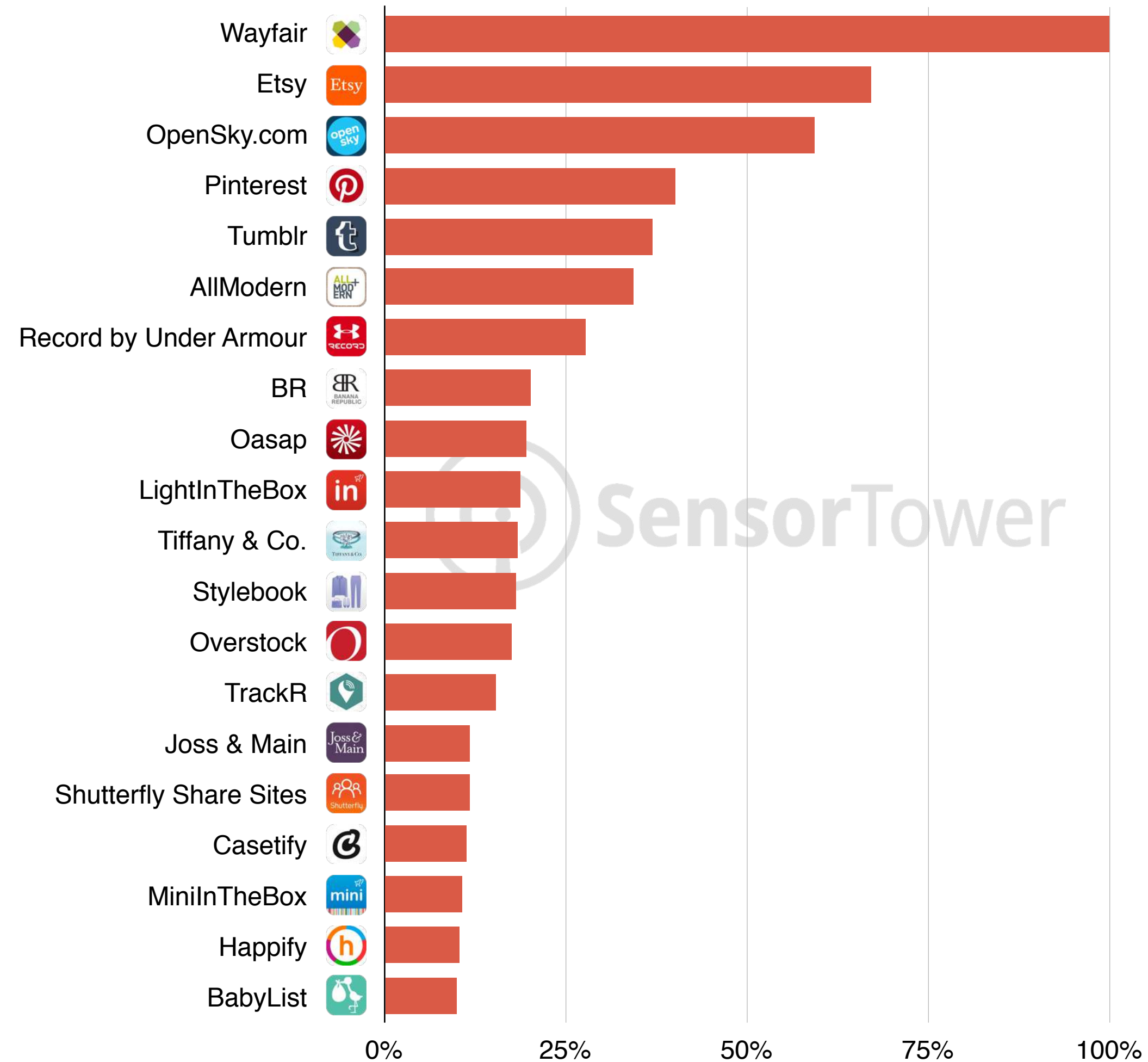
## Google Owned Four of Top 20 Spots

Google used its own platform to promote the Google app, Chrome, Chromecast, and YouTube Music.



# Top 20 Pinterest Advertisers

Pinterest Advertisers by Indexed Impressions - United States



## Pinterest Users Aren't Gamers

On every other network, gaming advertisers were the majority. On Pinterest, no games made the top 20.



## A Platform of Consumers

Fashion and interior design apps tapped into Pinterest's unique "wish list"-loving audience.

# Top Creatives

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# Top AdColony Creative



## Boom Beach by Supercell

This video was the top ad creative measured by total impressions in Q4 on AdColony. We saw Spanish, Russian, Japanese, and other versions as Supercell leads the way in great localization for all of its creatives.



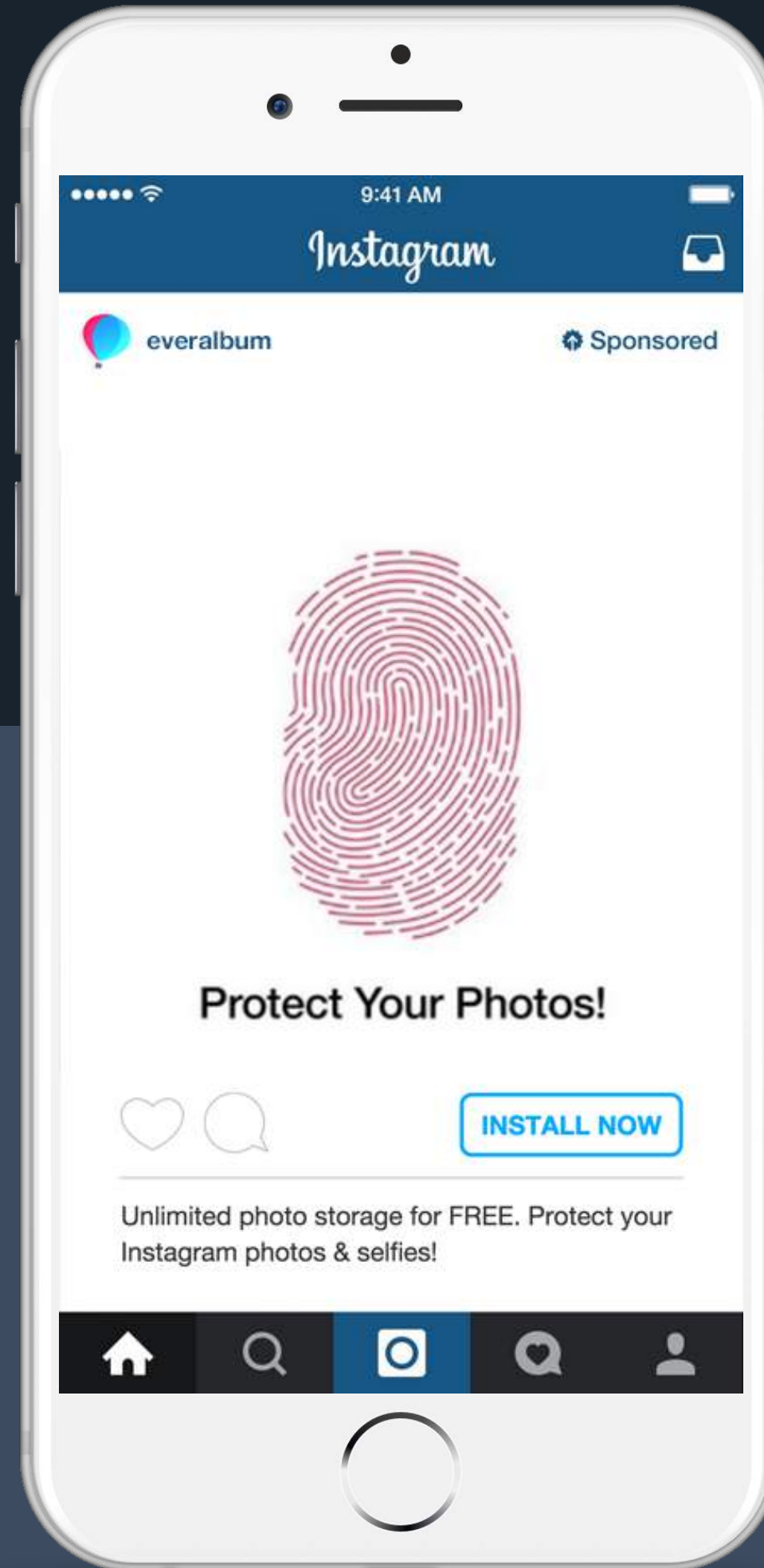
# Top YouTube Creative



## Google App by Google

"What was the curse of the Bambino?" — This ad is only seven seconds long, which might speak to why it was one of the most widely served Google ads on the YouTube network.

# Top Instagram Creative



## Everalbum by Everalbum Corp.

This simple creative from Everalbum was seen twice as often as the second-most-served ad on Instagram. It was also translated into Norwegian, among other languages, as the publisher looks to grow its user base outside the U.S.

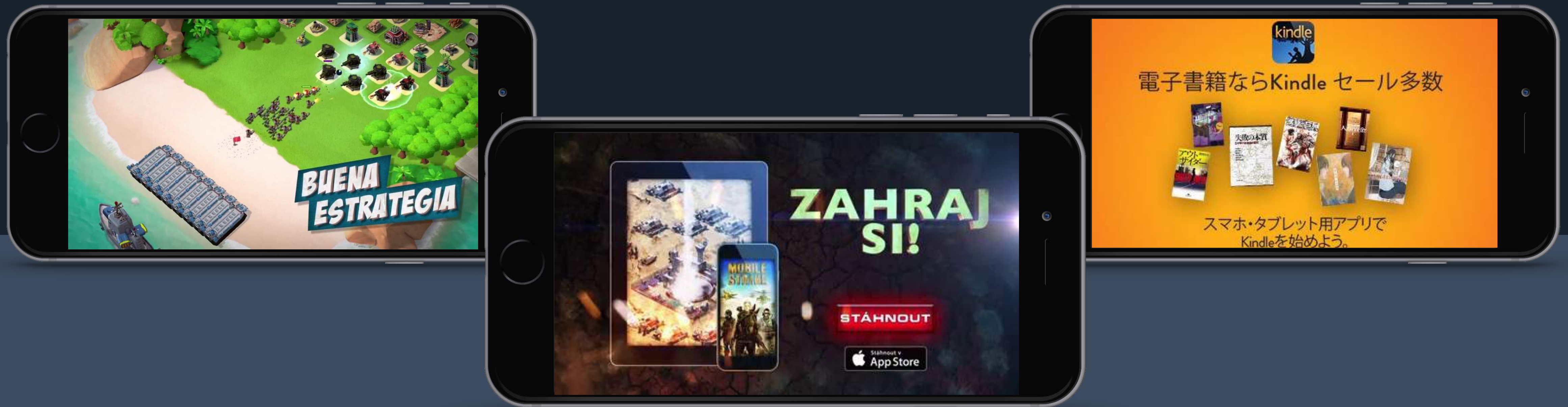
# Creative Trends

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# Localization and Personalization



## Creatives Got Personal (in a Good Way)

With tools including look-a-like audiences on Facebook and handle targeting on Twitter, mobile advertisers can get creatives in front of highly targeted audiences. We started seeing an increase in localized creatives and personalized messages from some of the larger publishers in Q4 and believe that this will become the norm in 2016.



# Popular IP and Celebrity Cameos



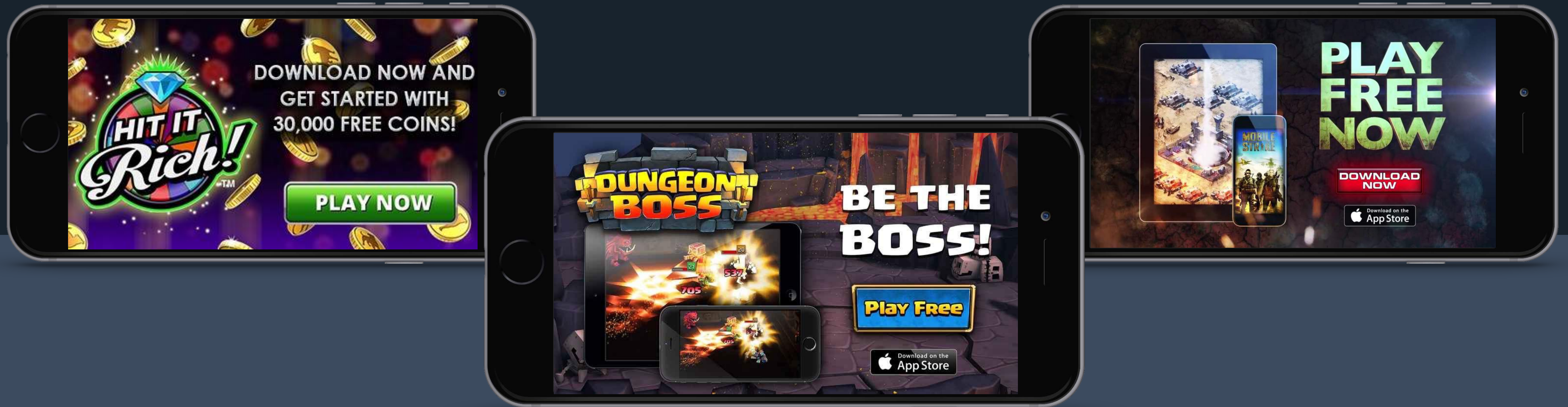
## More Arnold, More IP Games

We're seeing an increase in intellectual-property (IP) based games and celebrity cameos in campaigns. The benefit of a celebrity endorsement is that it allows a game to stand out in an increasingly crowded app market.

Consumers are more willing to try a new app if they're familiar with the celebrity or IP. Just as mobile video is growing to provide richer context of the in-app experience, we expect to see more celebrity endorsements as advertisers compete for user attention.



# Focusing on Immediacy



## Free. Play. Now.

Among the most-seen terms in Q4 were those emphasizing the immediacy to start playing or using the application: “play now,” “free play,” “get it now.”

The second-most-used term was “free,” emphasizing the free-to-play aspect.



# Our Solutions

App Marketing Intelligence Made Simple

Sensor Tower is the leading platform for app store optimization and app industry intelligence.

Click on a solution for more information:



## Top Charts & Leaderboards

Monitor app trends throughout the global app economy.



## App Intelligence

Drive organic growth with the leading App Store Optimization platform.



## Store Intelligence

Make strategic decisions with the industry's most accurate estimates.



## Ad Intelligence

Develop winning user acquisition campaigns with crucial mobile advertising insights.



# Contact Us

Let's Talk About Data!

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## Address

185 Berry Street  
Suite 4805  
San Francisco, CA 94107

## Email

[sales@sensortower.com](mailto:sales@sensortower.com)  
[info@sensortower.com](mailto:info@sensortower.com)

## Social Media





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