

# MOBILE PROGRAMMATIC OUTLOOK

APMEA | H1 2018

# ABOUT THE REPORT

The H1 2018 APMEA Programmatic Insights Report is our first study of both buying and selling behaviors in the InMobi exchange. Our unique visibility into programmatic trends provides a comprehensive picture of the health and direction of the market, and we're thrilled to be able to share it with you here

## METHODOLOGY

This report is a thorough examination of the billions upon billions of mobile ad impressions served on InMobi's exchange platform during the first half of 2018 (January through June, 2018). InMobi serves up to 7.3 billion ad request each day, across 1.5 billion mobile users around the world each month. Specifically, we use ad request to our platform to illustrate the reach of our publisher ecosystem, and ad spend to depict the adoption of programmatic by advertisers

# KEY MOBILE PROGRAMMATIC INSIGHTS FOR APMEA

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## Programmatic Buying in APMEA – Positive Signs Ahead

- 1 Hailed by advertisers for its potential to streamline the process of ad buying, programmatic advertising is set to dominate the Asian digital advertising sector. In APMEA, InMobi Exchange saw a positive uptake: Both the side of the marketplace (demand & supply) saw healthy growth from H1 2017 to H1 2018.

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## Programmatic Is Moving Beyond The Buzzword In APMEA

- 2 Mobile programmatic ad spend has grown 127% from H1 2017 to H1 2018. These stats clearly indicate that the Asian market is ready for programmatic ads, marketers are more confident in the concept, and consumers recognize the brands that are active in this space already. FMCG, Telcos and Entertainment were the top spenders in mobile programmatic advertising for H1 2018.

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## Video is growing over display on Exchange

- 3 In terms of ad formats, advertisers prefer video for mobile programmatic. It has grown significantly by 193% from H1 2017 to H1 2018. With engagement rates double that of traditional ad formats, video ads powered with the right mobile-first creatives present a compelling opportunity for brands to win

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## Advertiser adoption of programmatic video is on the rise

- 4 In APMEA, advertisers are increasingly spending on videos via programmatic channels, recording almost 2x growth in just one year. Programmatic transacting of video touts the benefits of rich and diverse data sources, efficiencies of automation, and transparency of targeting and reporting.

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## Private Marketplaces are increasing in popularity in APMEA

- 5 With 62% of programmatic spends being directed via private marketplaces in APMEA for H1 2018, clearly advertisers are looking for premium inventory and higher returns when spending programmatically.
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InMobi Exchange, Both Side Of The Marketplace Saw Healthy Growth from H1 2017 to H1 2018; Demand (ad spend) and supply (ad requests) were both up QoQ.

**InMobi Exchange Growth in APMEA H1 2017 Vs. H1 2018**



## Fortune 500 Brands Spent Big In 2017



- Globally in H1 2018, Fortune 500 brands made up over 90% of mobile programmatic ad spend. Clearly the future lies in programmatic buying.
- It will become a one stop solution for delivery of all kinds of digital/mobile ads (banners/rich media or videos) across web or mobile platforms for the time to come.
- The need of the hour is to educate the market, adapt to the ever changing requirements and plan to localise and customise. This has immense potential to deliver value to both advertisers and publishers alike.

# Indonesia Leads Mobile Programmatic Ad Spend; Australia Leads in terms of Growth Rate

## Mobile Programmatic Ad Spend by Country

Country	H1 2018	H1 2017	% Growth
Indonesia	35%	45%	76%
Australia	24%	15%	273%
Saudi Arabia	7%	4%	286%
Vietnam	4%	11%	-25%
Singapore	4%	4%	153%
UAE	3%	4%	69%
Japan	4%	1%	1012%
South Africa	3%	0%	2248%
Philippines	2%	1%	275%
Thailand	2%	2%	178%
South Korea	3%	2%	272%
Malaysia	2%	1%	452%

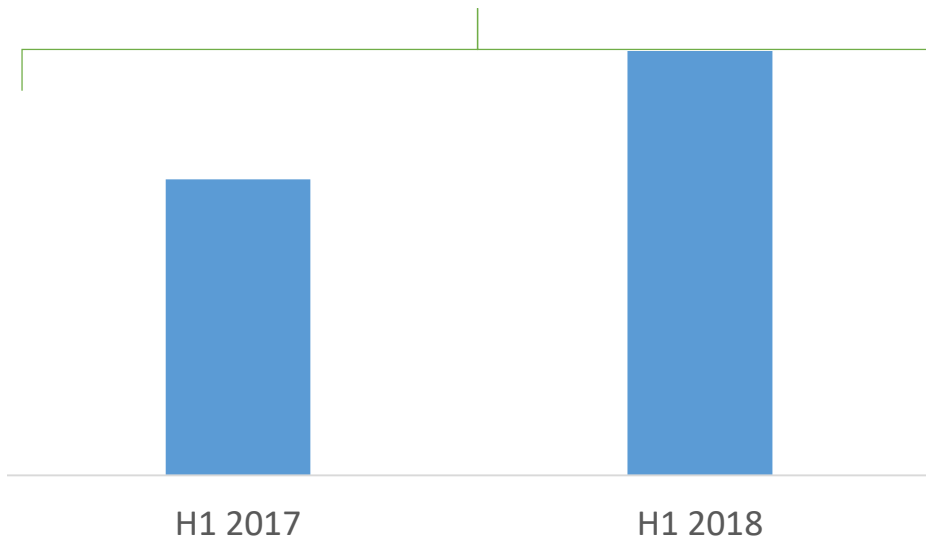
- Indonesia is the largest programmatic market by spend in the world by far. It is followed by Australia and Saudi Arabia.
- Programmatic ad spend in Australia has shown a tremendous growth of 273% . Advertisers are increasingly using programmatic technology to improve the efficiency of their ad spend and tackle fraud

# Programmatic Is Moving Beyond The Buzzword In APMEA

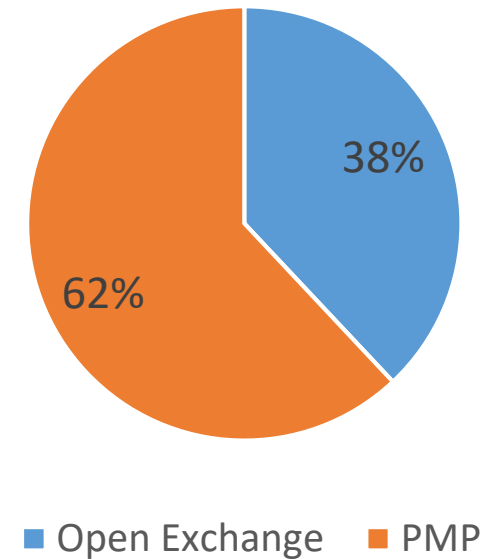
- Programmatic Buying in APMEA – Positive Signs Ahead : Mobile programmatic ad spend has grown over 1.2x from H1 2017 to H1 2018. In terms of transaction type most of advertisers are moving to private marketplaces to maximize returns.
- Extensive use of mobile is a key factor in the move to programmatic advertising in APMEA. Unlike traditional advertising, programmatic provides transparency, viewability, targeting, and retargeting in real-time and a wide range of ad formats and channels on which they can run their ad campaigns is the main driver for this growth.
- These stats clearly indicate that the Asian market is ready for programmatic ads, marketers are more confident in the concept, and consumers recognize the brands that are active in this space already

## Mobile Programmatic Ad Spend in APMEA H1 2017 Vs. H1 2018

Growth Rate - 127%



## Mobile Programmatic Ad Spend by Transaction Type , H1 2018



# FMCG, Telcos and Entertainment Verticals Drove Mobile Programmatic Spend For 2017

Verticals	% Ad Spend
FMCG - F & B	52%
Telecom	4%
Entertainment	4%
FMCG - Home Care	4%
Retail	4%
Automotive	4%
News	3%
Finance	3%
Gaming	3%
Travel & Tourism	2%

- FMCG, Telcos and Entertainment were the top spenders in mobile programmatic advertising for H1 2018



## Even though Display Make Up Most Of The Supply in H1 2018, But High Impact Ad Formats Like Videos Continue To Grow Faster

### Mobile Programmatic Ad Spend by Creative Format

Ad Format	H1 2017	H1 2018
Banner Ads	79%	71%
<b>Video Ads</b>	<b>21%</b>	<b>27%</b>
Native Ads	0%	2%

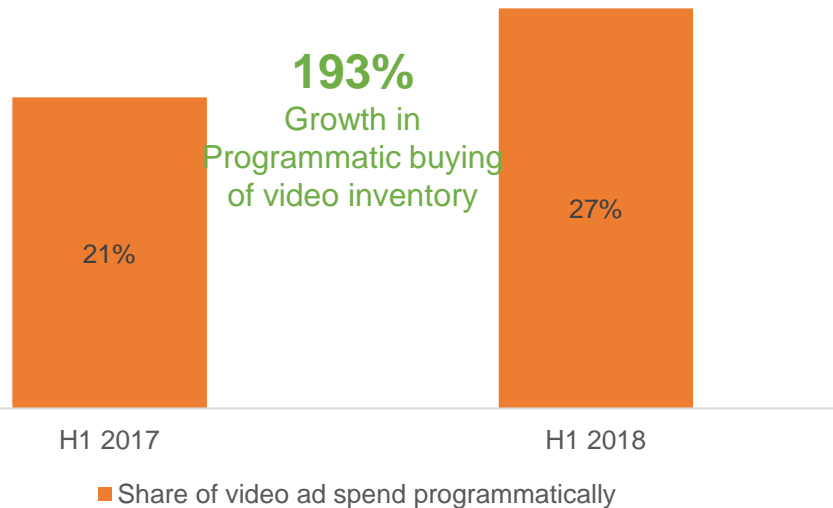
- Clearly programmatic video as arrived and is on an upward rise. As programmatic technology evolves, and consumers' move to video away from the TV screens, the shift in programmatic video technology is only waiting to happen. For advertisers and publishers, alike, programmatic video represents a huge opportunity for improved efficiency as well as profit

# PROGRAMMATIC & VIDEO : A GROWING TREND

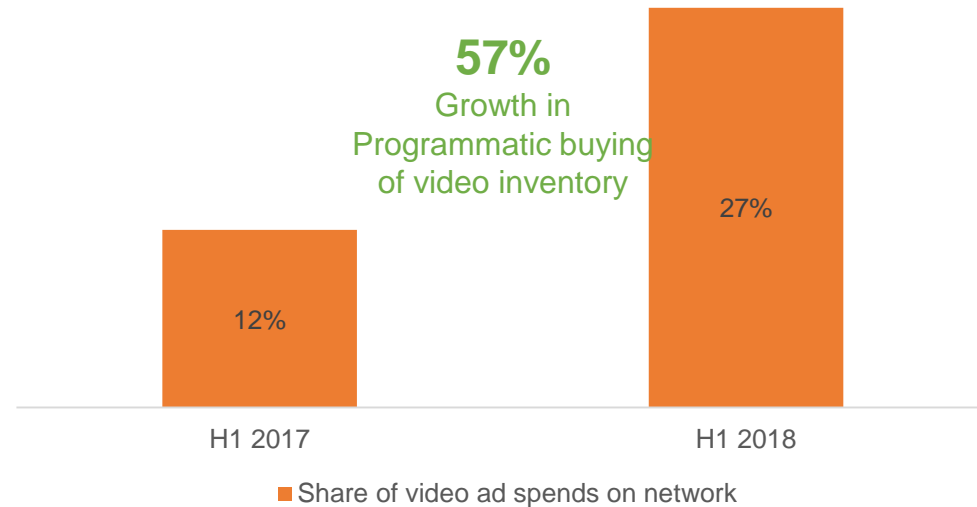
## ADVERTISER ADOPTION OF PROGRAMMATIC VIDEO IS ON THE RISE

- Mobile and video as a medium have a major role to play in elevating the market share that programmatic has been enjoying. In APMEA, advertisers are increasingly spending on videos via programmatic channels, recording almost 2x growth in just one year.
- Programmatic transacting of video touts the benefits of rich and diverse data sources, efficiencies of automation, and transparency of targeting and reporting.

### Share of Video Ad Spent on Buying Inventory Programmatically



### Share of Video Ad Spent on Network



Source: InMobi Exchange H1 2018

X% refers to positive growth in video ad spent on buying inventory programmatic

## APMEA VIEWABILITY METRICS

- The arrival of MRC’s Viewability Guidelines\* provided a single globally accepted definition for mobile video Viewability. As Viewability of ad impressions takes center stage, brand advertisers must demand MRC-compliant metrics for their ad campaigns. Third party verification measurement partners such as MOAT are incorporated directly into InMobi’s SDK resulting in cleaner metrics and the option to optimize the campaign on Viewability metrics.
- InMobi’s DMVR approach delivers 2x better than the MOAT Viewability benchmark for Q1 2018. The InMobi scores are based on H1 2018.

<u>Viewability Metrics</u>	<u>InMobi Score - APMEA</u>	<u>Global MOAT Benchmark</u>
Average Human and Viewable Rate	94%	59.7%
AVOC Rate	43%	29.60%
MOAT Video Score	53	53

# ABOUT US

InMobi is a global mobile advertising platform that specializes in delivering the best ROI for mobile marketers. A mobile-first and mobile-only platform, InMobi has been pioneering the next generation of ad experiences, including video advertising, on the back of deep learning based optimization engines.

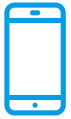
InMobi platforms help brands, performance marketers and app publishers engage mobile users across different stages of their lifecycle, converting each mobile moment into an opportunity to drive engagement and revenue. Recognized by Fast Company as one of The Most Innovative Companies in 2016, InMobi reaches over 1.5 billion unique mobile devices worldwide, and is redefining business models for the mobile ecosystem. For more information, visit

[www.inmobi.com](http://www.inmobi.com)

[contactus@inmobi.com](mailto:contactus@inmobi.com)

## WE ARE A TECHNOLOGY POWERHOUSE

The global scale & reach of our full-stack advertising platform helps brands nudge mobile users across different stages of their lifecycle, converting each mobile moment into an opportunity to drive engagement & revenue.



**1.5 BILLION+**

UNIQUE MOBILE  
DEVICES



**20,000+**

GLOBAL  
ADVERTISERS



**120+ TB**

OF USER DATA  
ANALYZED MONTHLY



**6 MILLION+**

APP DOWNLOADS  
TRACKED MONTHLY



**32,000+**

PUBLISHER  
APPS



**200 BILLION+**

MONTHLY AD  
REQUESTS

# ABOUT INMOBI, COMPANY OVERVIEW

Over 9 years pioneering mobile advertising and discovery spanning the globe



## GLOBAL COVERAGE

Global reach and scale with local expertise, spanning 18 offices across the globe, and a dominant position in key mobile markets like North America, China and India



## DEMAND POOLS

World-class performance, brand, and commerce advertisers accessible via every buying scheme, from fully programmatic -open and private, to managed services



## PUBLISHERS GROWTH SOLUTIONS

InMobi features a comprehensive suite of publisher solutions that solve for all mobile growth needs: user acquisition, user monetization and audience extension



## ECOSYSTEM PARTNERSHIPS

InMobi's dedicated Global Alliances team forges long-lasting partnerships with key industry players to ensure seamless campaign execution and measurement to our clients while delivering the best possible ad experience to our consumers.

# THANK YOU



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[inmobi.com](http://inmobi.com)



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