

MOBILE PROGRAMMATIC OUTLOOK

AUSTRALIA | H1 2018

ABOUT THE REPORT

The H1 2018 Australia 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 AUSTRALIA

273% Growth in Programmatic Buying in Australia – Positive Signs Ahead

- 1 Hailed by advertisers for its potential to streamline the process of ad buying, programmatic advertising is gaining momentum amongst advertisers. Ranking 7th worldwide in spends on Mobile Programmatic Buying, Australia witnessed a by 273% growth Y-o-Y.

23% of all Mobile Spends occur Programmatically

- 2 Mobile programmatic ad spend has grown from a mere 7% share of all mobile ad spends to account for almost a quarter of the mobile ad spends in H1 2018. from H1 2017 to H1 2018. The growing awareness of its benefits are driving advertisers to spend more programmatically than ever before.

Open Exchange is the preferred medium over PMP

- 3 In a matter of one year, Australian advertisers have moved from a predominantly PMP model to Open Exchange, where spends on Open Exchange account for 74% share in H1 2018 compared to only 11% in H1 2017.

545% Y-o-Y Growth in Video Ad Spends via Programmatic channels; Video accounts for 33% share of all spends

- 4 Spends on Video advertising has grown over 5x between H1 2017 and H1 2018. Video now accounts for 33% of all mobile programmatic ad spends in Australia. Programmatic transacting of video touts the benefits of rich and diverse data sources, efficiencies of automation, and transparency of targeting and reporting.

Viewability Rates are 2x the benchmark; IVT is < 4% of benchmark

- 5 With a viewability rate of 89%, Australia delivers 2x the viewability with minimal (4%) Invalid Traffic in the country.

BUYERS AND SELLERS INCREASE INVESTMENT IN PROGRAMMATIC BUYING

H1 2018 INMOBI EXCHANGE GROWTH IN AUSTRALIA



MOBILE SPENDS ON PROGRAMMATIC GREW BY 273%Y-o-Y

SHARE OF MOBILE AD SPENDS AND ANNUAL GROWTH BY COUNTRY

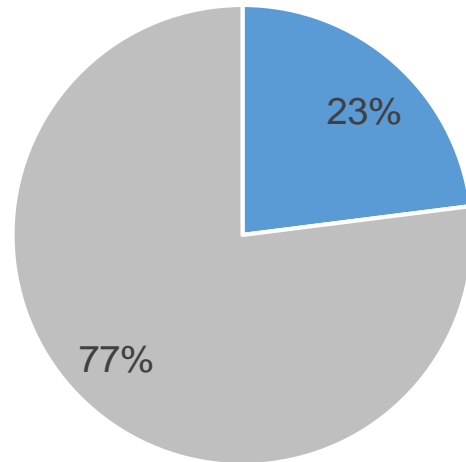
Country	H1 2018	H1 2017	% Growth
USA	69%	52%	395%
China	14%	26%	112%
Indonesia	2%	5%	76%
India	2%	1%	757%
Canada	2%	2%	285%
United Kingdom	2%	3%	100%
Australia	2%	2%	273%
Germany	1%	2%	140%
France	1%	1%	181%
Saudi Arabia	0%	0%	286%

H1 2018 numbers include the programmatic data from Aerserv.
 Source: InMobi Exchange H1 2018

A QUARTER OF MOBILE AD SPENDS IN AUSTRALIA ARE PROGRAMMATIC

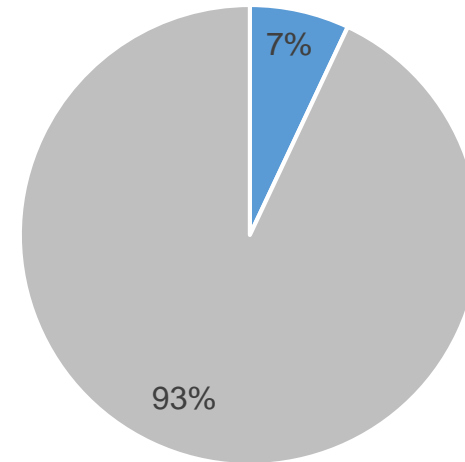
SHARE OF MOBILE AD SPENDS BY CHANNEL

H1'18 Australia Share of Spends by Channel



- Share of Spend on Programmatic
- Share of Spend on non-programmatic

H1'17 Australia Share of Spends by Channel

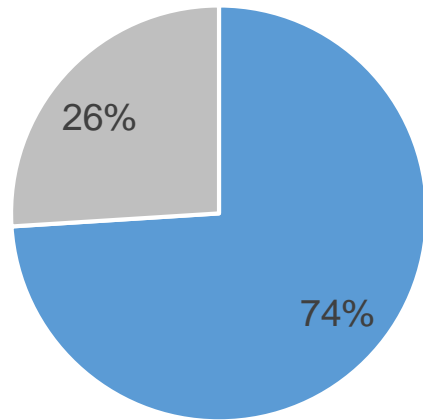


- Share of Spend on Programmatic
- Share of Spend on non-programmatic

THREE-FOURTHS OF AD SPENDS ON PROGRAMMATIC OCCUR ON OPEN EXCHANGE

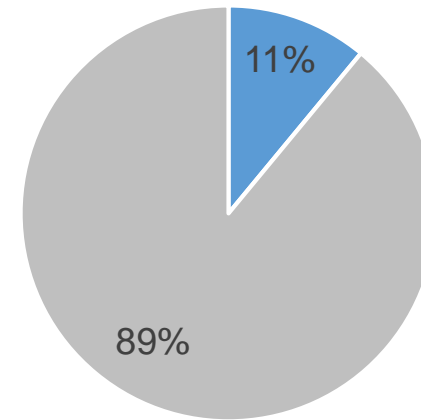
SHARE OF MOBILE AD SPENDS BY PROGRAMMATIC CHANNEL

H1'18 Australia Share of Spends by Programmatic Channel



■ Open Exchange ■ PMP

H1'17 Australia Share of Spends by Programmatic Channel



■ Open Exchange ■ PMP

H1 2018 numbers include the programmatic data from Aerserv.

Assumption: Most of Aerserv spend is via OX.

Source: InMobi Exchange H1 2018

ADVERTISERS ACROSS VERTICALS ARE SPENDING PROGRAMMATICALLY

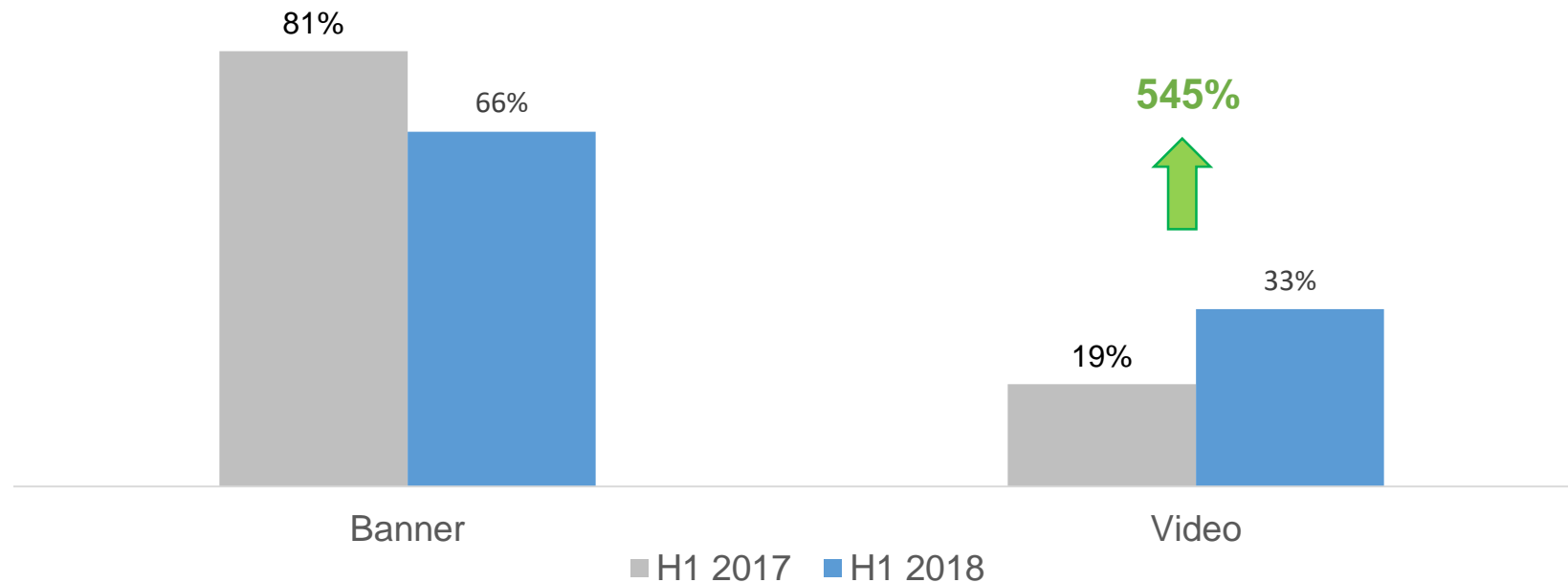
Verticals	% Ad Spend
FMCG - F & B	16%
Real Estate	12%
Entertainment	10%
Automotive	9%
Telecom	9%
FMCG - Home Care	8%
Education	7%
Gaming	5%
Finance	4%
Government	4%

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

PROGRAMMATIC & VIDEO : A GROWING TREND

ONE-THIRD OF MOBILE PROGRAMMATIC AD SPEND IS ON VIDEO

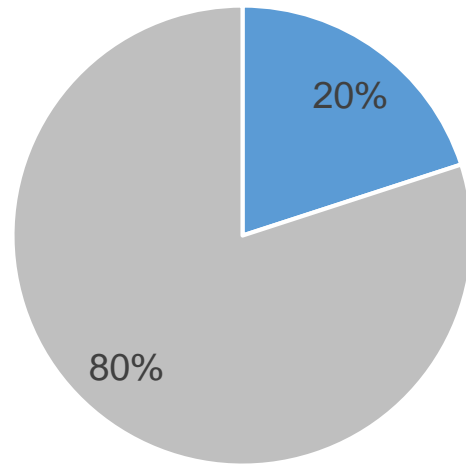
SHARE OF MOBILE PROGRAMMATIC SPENDS BY AD FORMAT



ONE-FOURTH OF VIDEO AD SPENDS ARE DONE PROGRAMMATICALLY

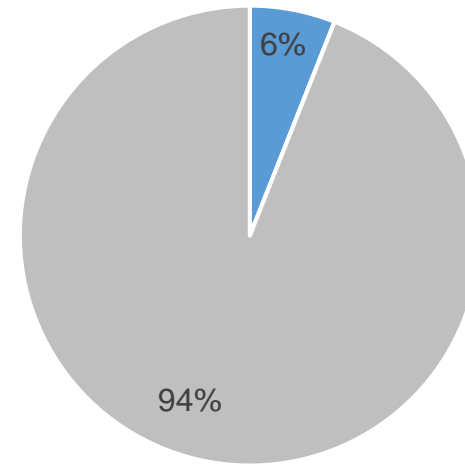
SHARE OF MOBILE VIDEO SPENDS BY CHANNEL TYPE

H1'18 Share of Video Spend by Channel



- Share of Video Spend on Programmatic
- Share of Video Spend on non-programmatic

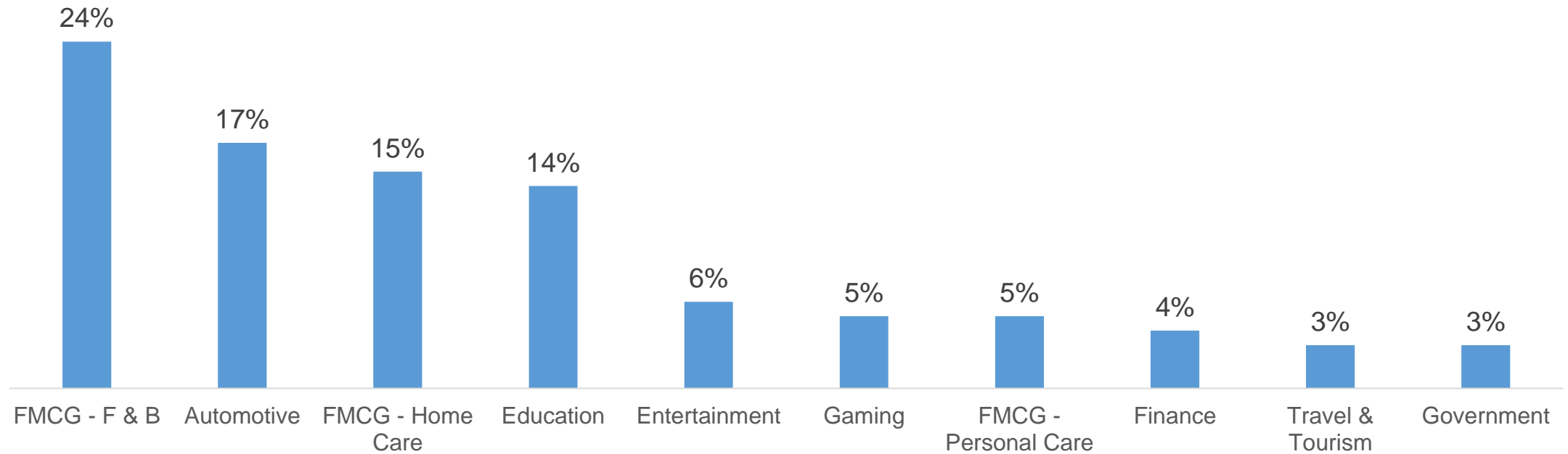
H1'17 Share of Video Spend by Channel



- Share of Video Spend on Programmatic
- Share of Video Spend on non-programmatic

FMCG AND AUTO ARE THE TOP VERTICALS BUYING VIDEO PROGRAMMATICALLY

H1'18 SHARE OF MOBILE VIDEO AD SPENDS PROGRAMMATICALLY



Source: InMobi Exchange H1 2018

AUSTRALIA VIEWABILITY METRICS

- InMobi’s DMVR approach delivers 2x higher viewability rates over MOAT Viewability benchmark for H1 2018. Moreover, the Invalid traffic (IVT) Rate is ~4% of the Global benchmark for the same period.

<u>Viewability Metrics</u>	<u>InMobi Score - Australia</u>	<u>Global MOAT Benchmark</u>
Average Human and Viewable Rate	89%	59.7%
AVOC Rate	28%	29.60%
IVT Rate	0.02%	0.5%
MOAT Video Score	52	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.

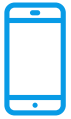
InMobi platforms help brands, performance marketers and app publishers engage mobile users across different stages of their lifecycle, converting each mobile moment into an opportunity to drive engagement and revenue. Recognized by Fast Company as one of The Most Innovative Companies in 2016, InMobi 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

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



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contactus@inmobi.com