

MOBILE ADVERTISING TRENDS

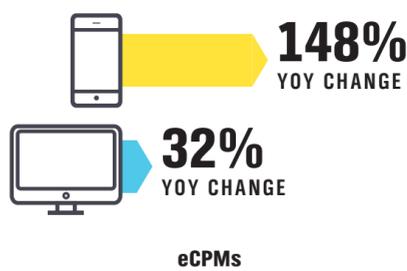
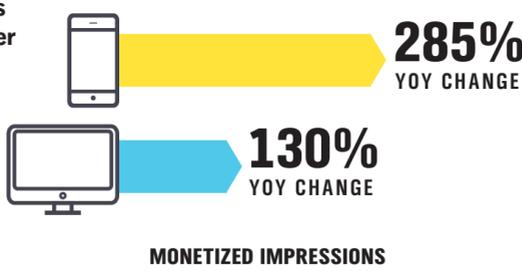
Learnings from our Q2 2017 Quarterly Mobile Index

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

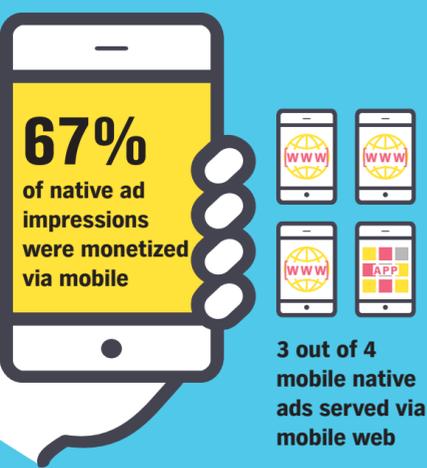
HEADER BIDDING BECOMING SYNONYMOUS WITH PROGRAMMATIC

>80% of global impressions processed through the PubMatic platform leveraged header bidding technology in May 2017

Impression volume and eCPMs rising faster in mobile

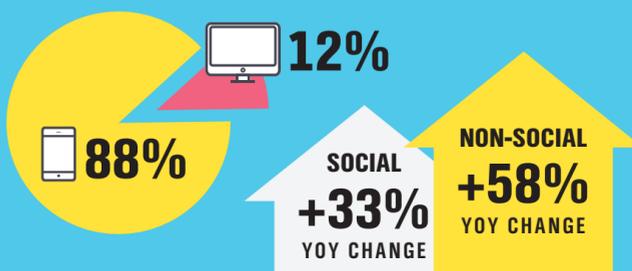


ADVERTISERS LEVERAGE NATIVE TO ENGAGE MOBILE USERS

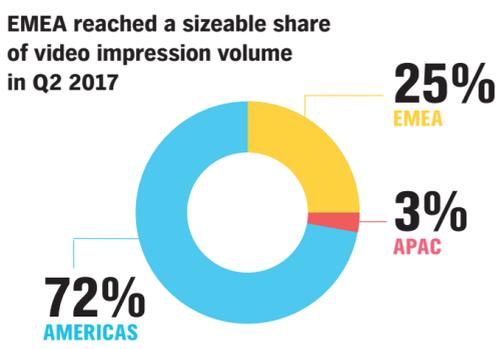


43% of US agencies and brands cite consumer engagement as the primary goal for programmatic native ads^[1]

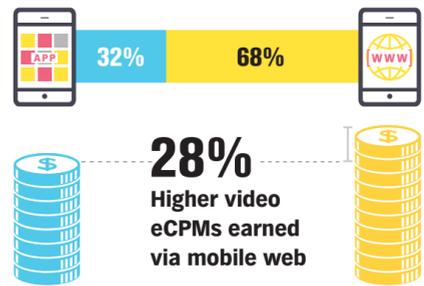
Mobile accounts for majority of US native ad spend, with non-social properties driving the growth in 2017^[2]



GLOBAL MARKETS AND MOBILE WEB OPPORTUNITY FUELED VIDEO GROWTH

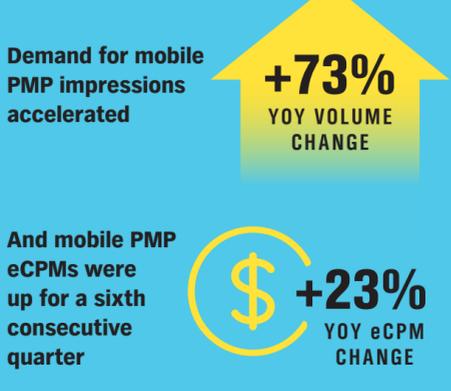


Mobile web leading in both mobile video volume share and eCPMs



50% of US agencies and brands say branding is their primary goal in purchasing video ads programmatically^[3]

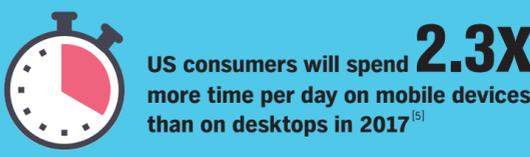
APPETITE FOR HIGH VALUE INVENTORY IS FEEDING MOBILE PMP GROWTH



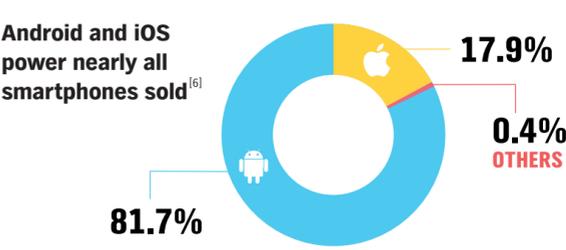
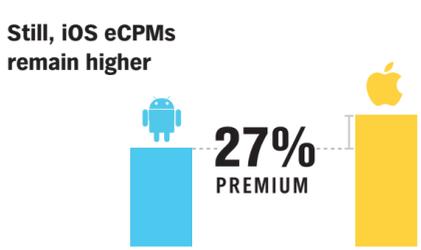
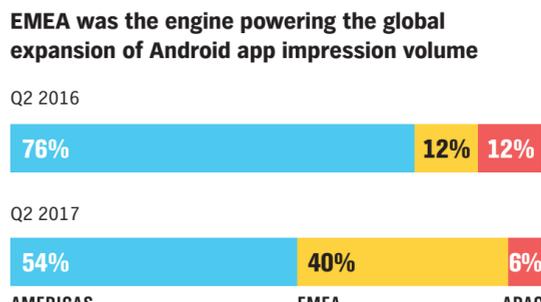
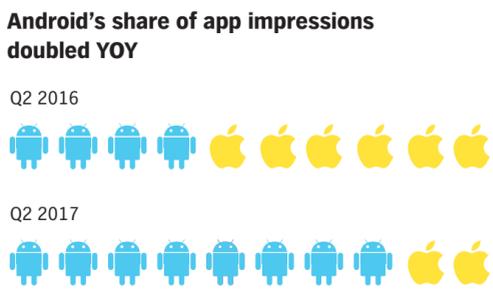
Mobile PMP uptake was driven by industry concerns^[4]

- AD & INVENTORY QUALITY
- VIEWABILITY

and the amount of time users spend with digital media

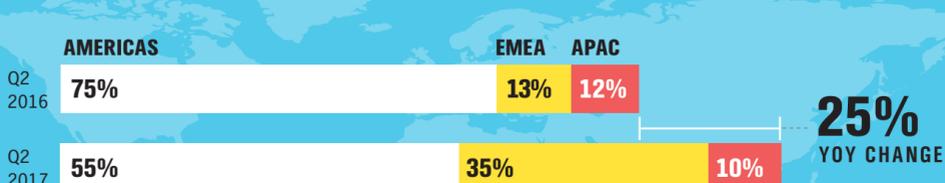


ANDROID CONSOLIDATES POSITION AS DRIVER OF APP OPPORTUNITY



MOBILE OPPORTUNITIES GREW WORLDWIDE

Monetized mobile impression volume rose globally with EMEA leading the recent expansion



EMEA also posted the greatest eCPM growth rate in Q2 2017



[1, 3] "State of the Industry: Moving Beyond Programmatic Display," Digiday and RhythmOne, December 2016
 [2] "US Native Digital Display Advertising Forecast: Social Dollars Drive the Market—for Now," eMarketer, March 2017
 [4] "Advancing Programmatic Advertising: Buyers and Sellers Seek Greater Control Over Ad Campaigns and Audiences Reached," eMarketer, April 2017
 [5] "Media Consumption Forecasts," Zenith, May 2017
 [6] "Market Share: Final PCs, Ultramobiles and Mobile Phones, All Countries, 4Q16," Gartner, February 2017