

COLLABORATIVE MARKETING TO EXECUTE AT THE RATE OF CHANGE SUMMIT

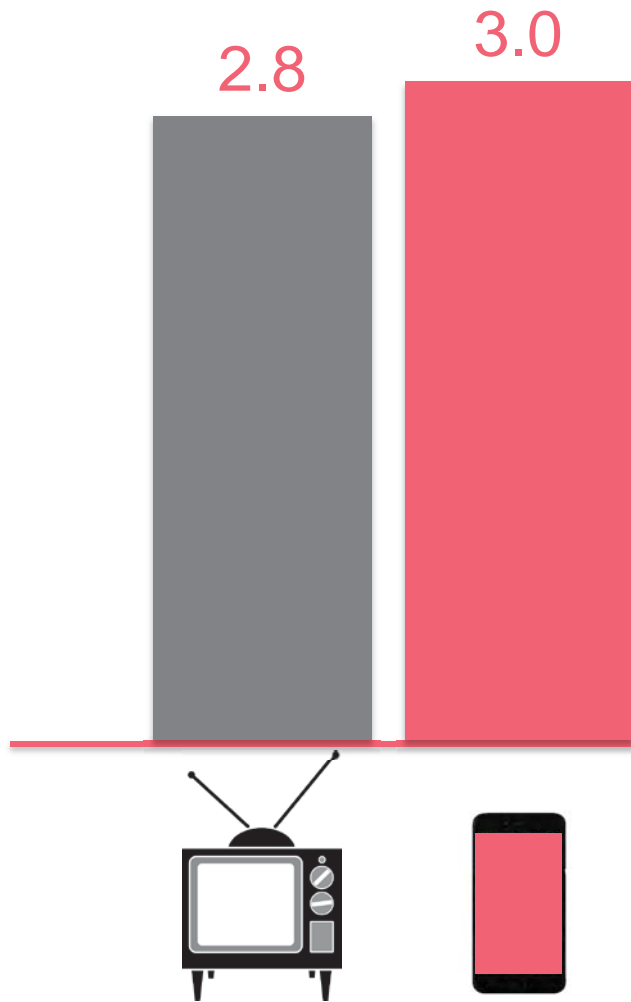


Bryan Leach
Founder and CEO
Ibotta, Inc.



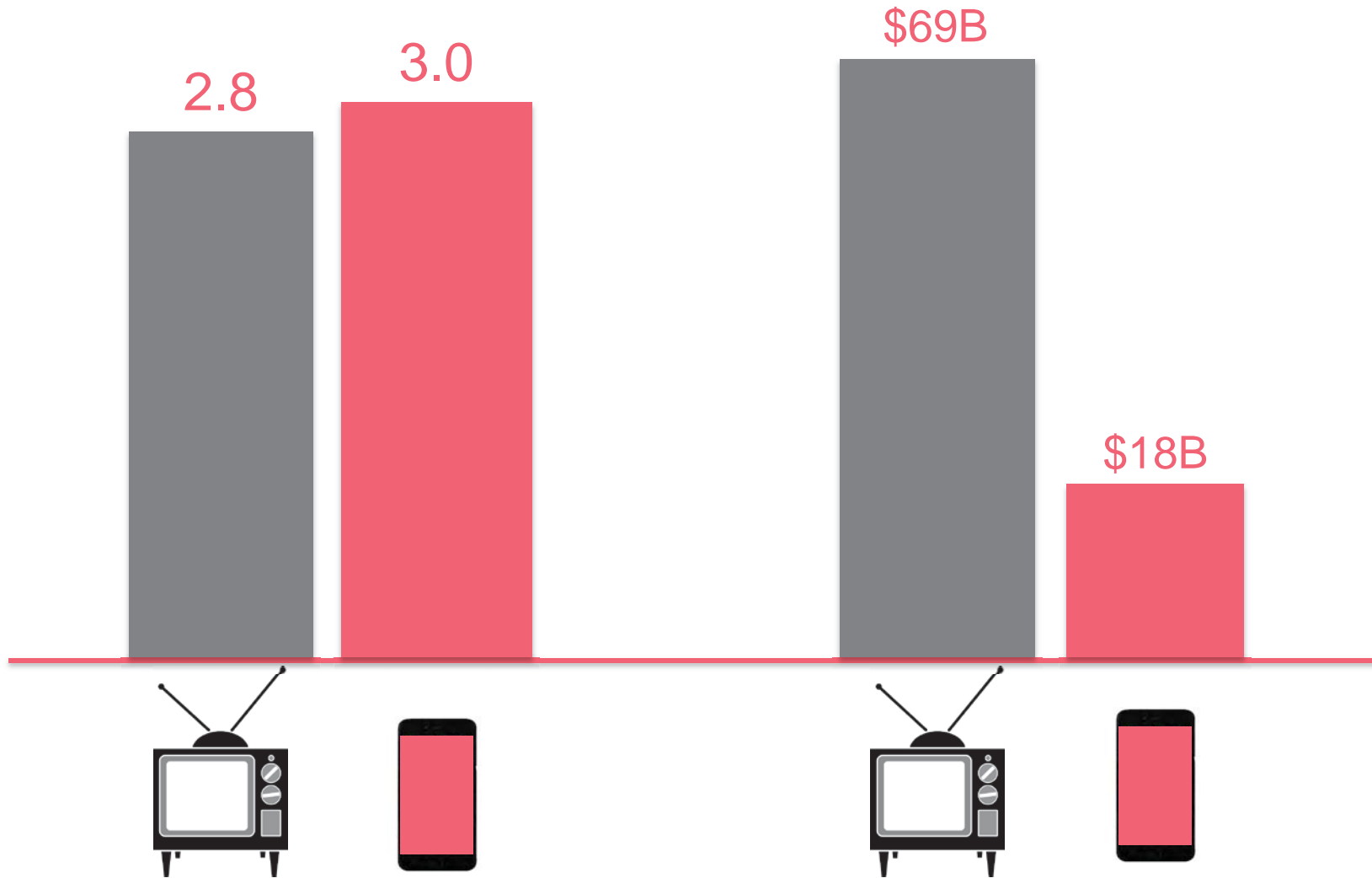
Media Consumption

(Daily Average Hours)

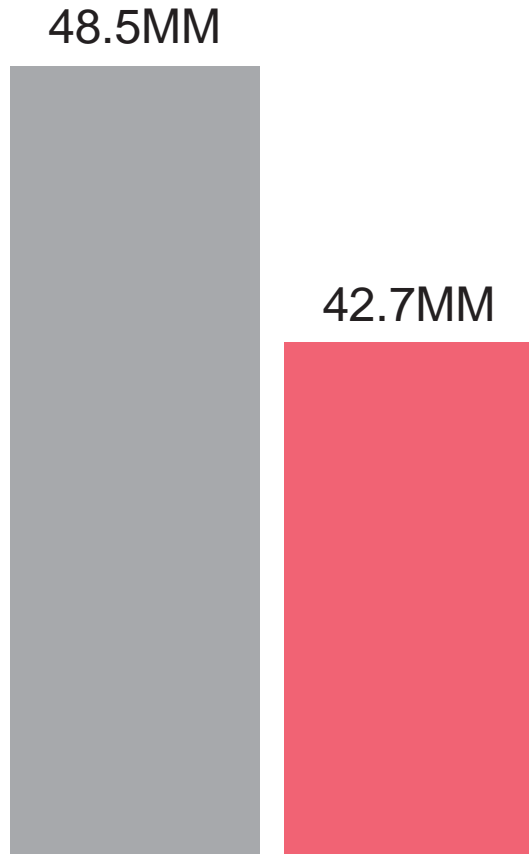


Marketing Spend

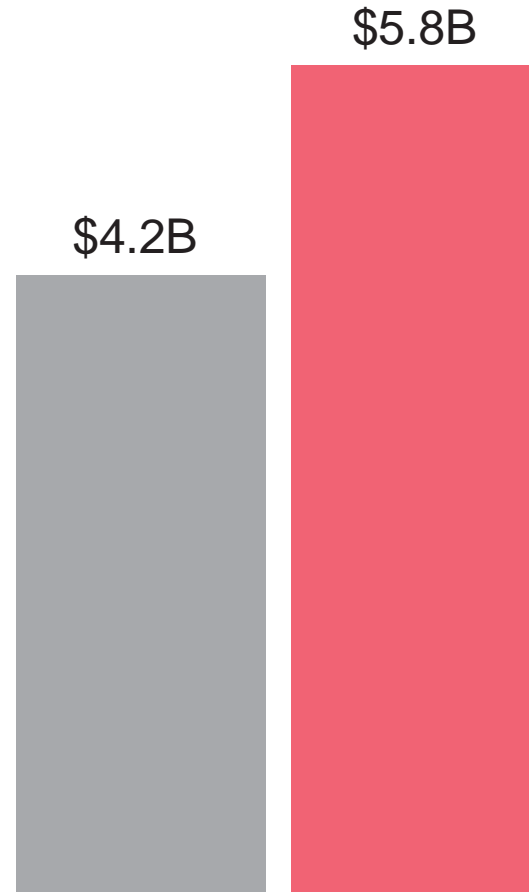
(USD, 2014)



Sunday Newspaper Circulation



Circular Spend



2011

2014

2011

2014

2005

Walmart
Save money. Live better.

Shop us first for Unbeatable Prices!
Our stores will match the price of any local competitor's printed ad for an identical product.
Price available in participating stores. Excludes some items. See store for details.

PRICE GUARANTEE

Friday Nov. 27
\$248
Emsion™ 32" LCD 720p-HDTV
• 16:9 diagonal viewing area
• 1400h, 1 computer, and 1 camera input
• HCS20081

5 to 11 a.m. ONLY!
\$448
Emsion™ 42" Plasma 720p HDTV
• 16:9 diagonal viewing area
• 1400h and 1 computer input
• HCS20081

Plus more savings all day Friday
Starting on page 24
\$798 SONY
Sony™ Bravia™ 40" LCD 1080p HDTV
• 16:9 diagonal viewing area
• 1400h, 1 computer, 1 composite, 1 video, and 1 PC input
• HCS20081

dollar power

free \$12
Tide
\$16
Bounty

\$1
100

\$5
2 for \$9
3 for \$9

SAVE AN EXTRA 5% OFF

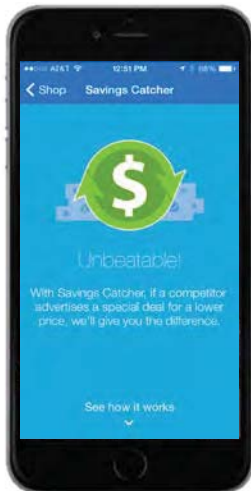
344834 Available Savings

WANT BIGGER SAVINGS?
Premium coupons are waiting for you.

SAVE \$1.00
Febreze
\$1 OFF
COUPON
CLICK HERE

SAVE \$1.00
Method
\$1.00 OFF
Alpert BARD
SAVE \$1.00
HERSHEY'S Holiday
SAVE \$1.00
JACK 'N' BREAD
SAVE \$1.00
Big G Corns
SAVE \$1.00
Pampers
SAVE \$1.00
Betty Crocker

2015



What's Wrong With This Picture?





Digital FSI: Yesterday's News

- ✗ Limited marketing value
- ✗ Reinforces transactional relationships
- ✗ Doesn't work in many retail environments
- ✗ Not reaching millennials
- ✗ Pay-per-clip vs. Pay-per-sale

Average Number of Apps Used Regularly



5

App Download Rankings (Lifestyle)



70



259



72



680



172



942































86% of time on mobile
is spent in native
apps.

The logo for TechCrunch, featuring the letters 'TC' in a bold, green, sans-serif font, followed by the words 'TechCrunch' in a black, sans-serif font.

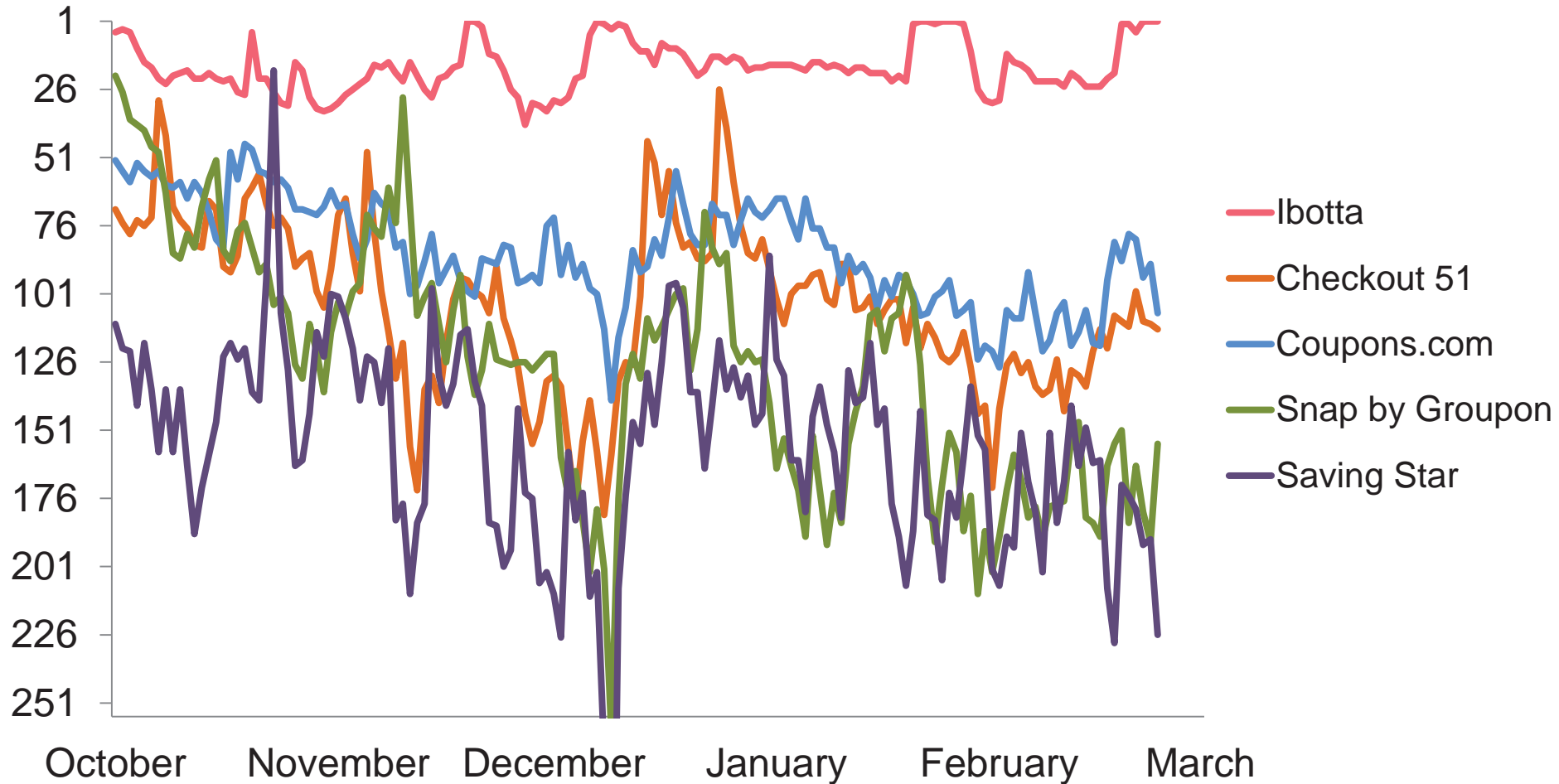
Top Free iPhone Apps

Paid Free Top Grossing

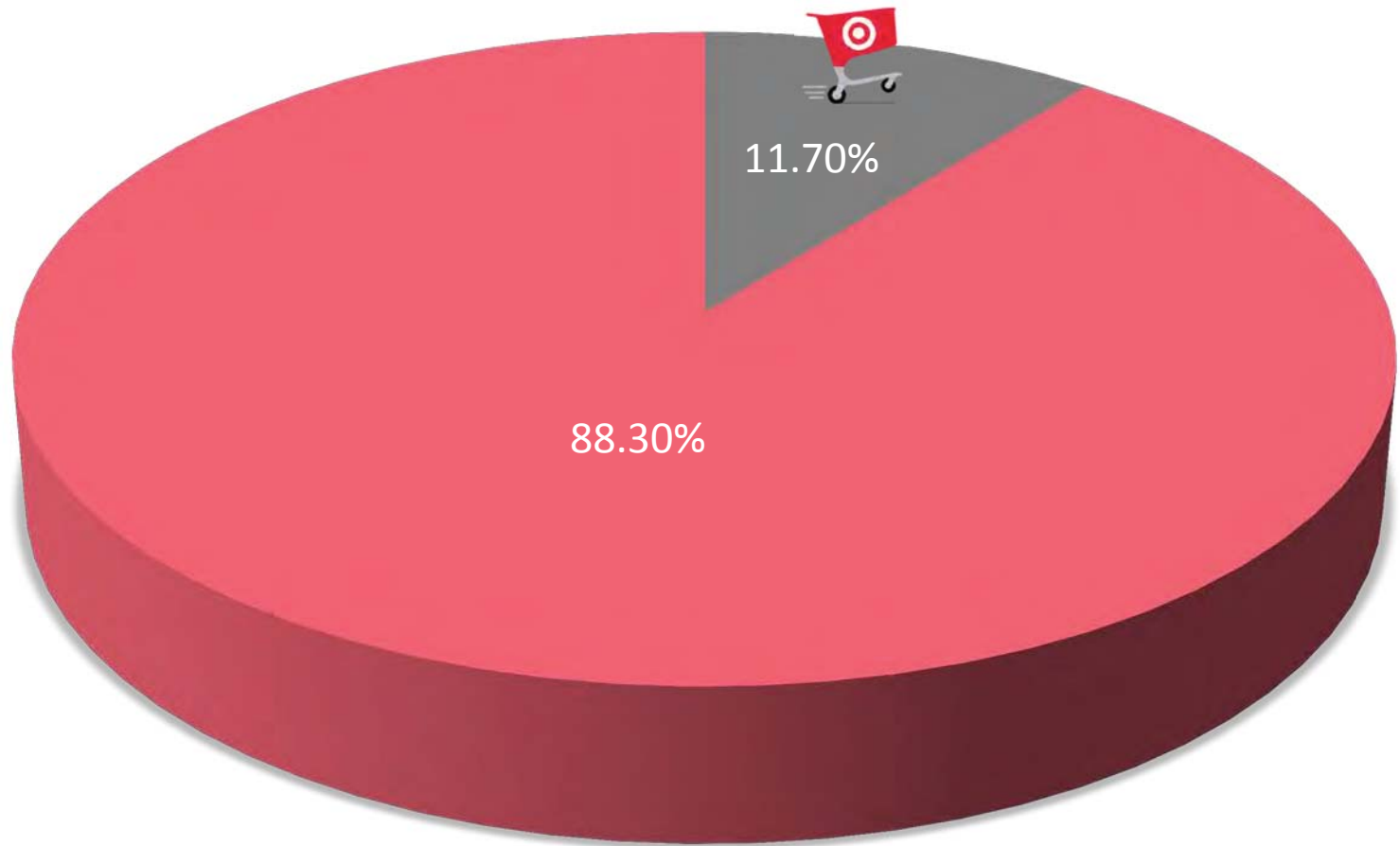
All Categories ▾

- | | | | | | | | | | |
|--|---|--|---|--|---|--|---|---|---|
|  <p>1. Facebook Messenger
Social Networking
+ Get ▾</p> |  <p>2. Facebook
Social Networking
+ Get ▾</p> |  <p>3. Instagram
Photo & Video
Get ▾</p> |  <p>4. YouTube
Photo & Video
+ Get ▾</p> |  <p>5. Snapchat
Photo & Video
Get ▾</p> |  <p>6. Pandora Radio
Music
+ Get ▾
In-App Purchases</p> |  <p>7. iTunes U
Education
+ Get ▾</p> |  <p>8. Trivia Crack
Games
+ Get ▾
In-App Purchases</p> |  <p>9. Spring Ninja
Games
+ Get ▾
In-App Purchases</p> |  <p>10. Google Maps
Navigation
+ Get ▾</p> |
|  <p>11. Dubsmash
Entertainment
Get ▾</p> |  <p>12. WhatsApp
Messenger
Social Networking
Get ▾</p> |  <p>13. Ibotta - Better than Coupons
Lifestyle
Get ▾</p> |  <p>14. Spotify Music
Music
+ Get ▾
In-App Purchases</p> |  <p>15. Pinterest
Social Networking
+ Get ▾</p> |  <p>16. Twitter
Social Networking
+ Get ▾</p> |  <p>17. Temple Run: Oz
Games
+ Get ▾
In-App Purchases</p> |  <p>18. Gmail - email from Google
Productivity
+ Get ▾</p> |  <p>19. Netflix
Entertainment
+ Get ▾</p> |  <p>20. Kik
Social Networking
+ Get ▾
In-App Purchases</p> |
|  <p>21. Show Your Disney Side
Photo & Video
Get ▾</p> |  <p>22. Google Utilities
Utilities
+ Get ▾</p> |  <p>23. SoundCloud - Music & Audio
Music
+ Get ▾</p> |  <p>24. Find My iPhone
Utilities
+ Get ▾</p> |  <p>25. Crossy Road - Endless Arca...
Games
+ Get ▾
In-App Purchases</p> |  <p>26. Candy Crush Soda Saga
Games
+ Get ▾
In-App Purchases</p> |  <p>27. ZigZag
Games
+ Get ▾
In-App Purchases</p> |  <p>28. Skype for iPhone
Social Networking
Get ▾
In-App Purchases</p> |  <p>29. Dictator: Outbreak
Games
+ Get ▾
In-App Purchases</p> |  <p>30. Candy Crush Saga
Games
+ Get ▾
In-App Purchases</p> |

Third Party Apps: Download Rankings



Addressing the Full Market



Not Preaching Just to the Converted



FOX NEWS FOX NEWS
.mobi

SARAH PALIN
FOX NEWS ANALYST

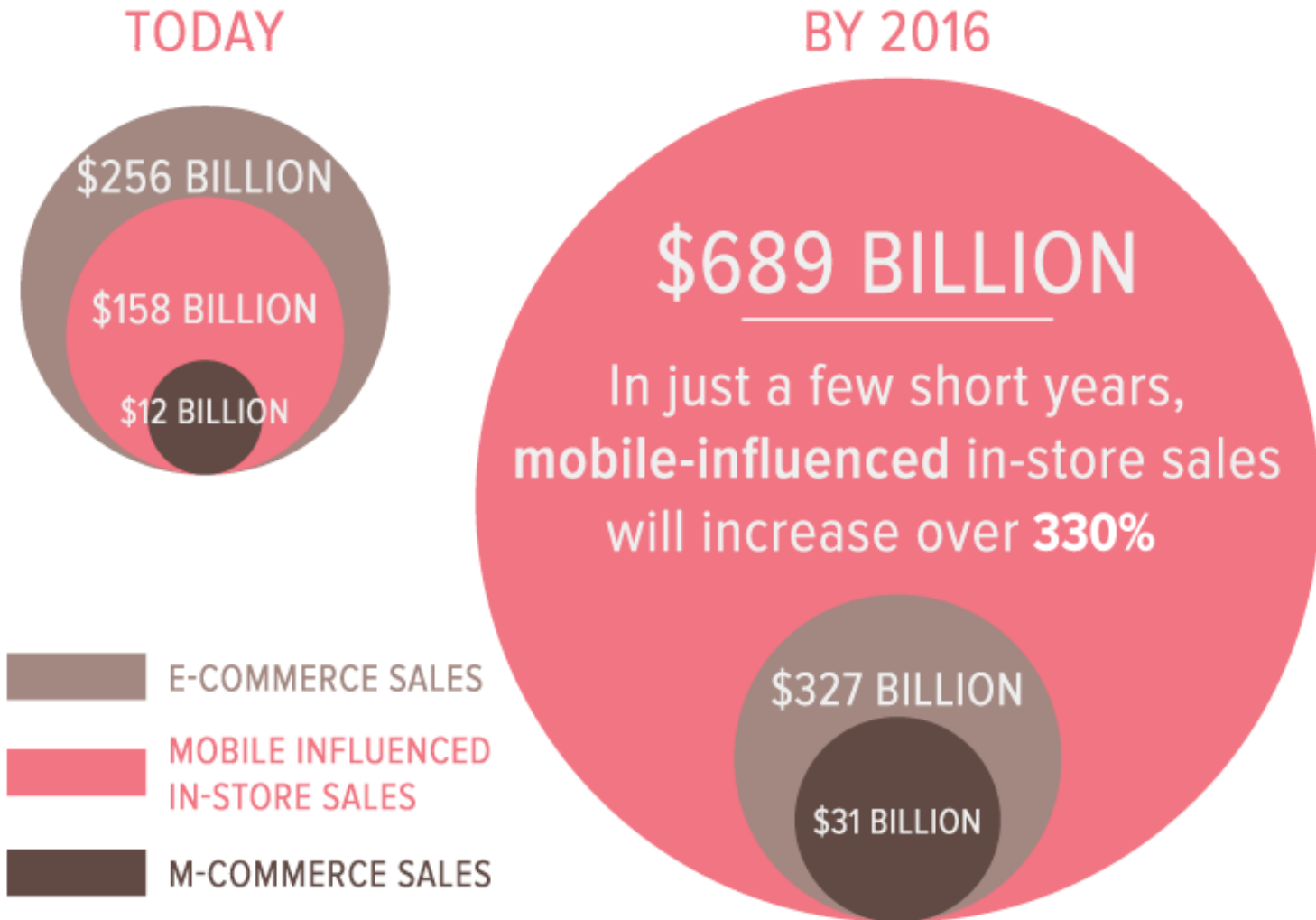
O'Reilly
FACTOR

...IDED TO THE HURRICANES AND TROPICAL STORMS THAT HIT HAITI

Offline Affiliate Models Are Emerging



A Big Opportunity



Case Study: Ibotta