



13th Annual Australian

BROADCASTING DIGITAL MEDIA **SUMMIT**



iab.
australia
interactive
advertising
bureau

ALICE MANNERS, CHIEF EXECUTIVE OFFICER

Online landscape review

What do the numbers
really mean for
broadcasters?

16%



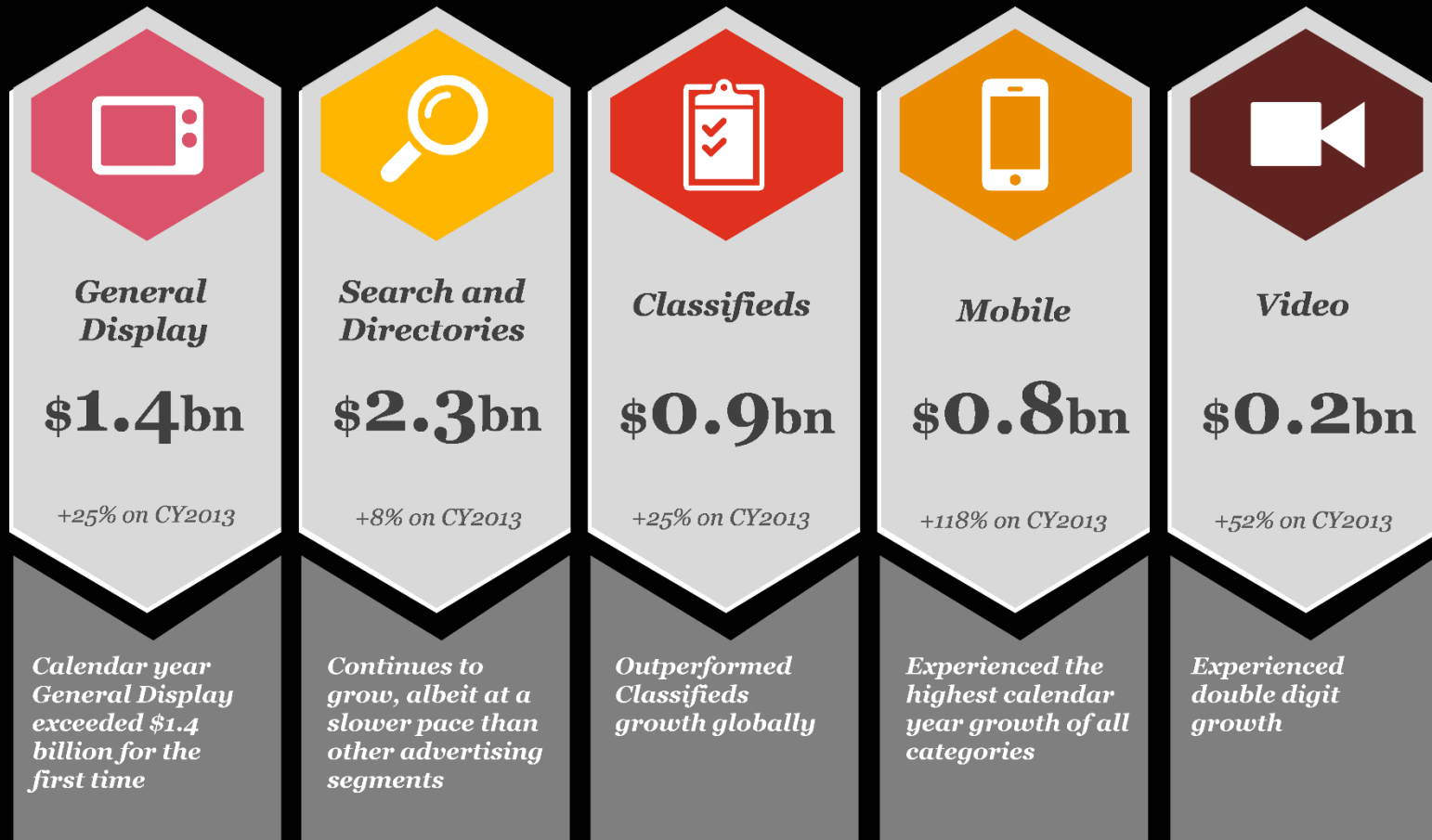
Total Online Advertising Market Growth
2014 vs 2013

\$4.6 billion

Total Online Advertising Market, 2014

Mobile & Video Continue To Climb

Video ON Mobile is the fastest growing section in the market



Video: Now 18% of Display Market

\$ 237.5m

Online video advertising expenditure, 2014

52%

Growth, 2014 vs 2013





Motor vehicles



16.9%

Share



Real Estate



11.0%

Share



Retail



10.9%

Share



Finance



9.3%

Share



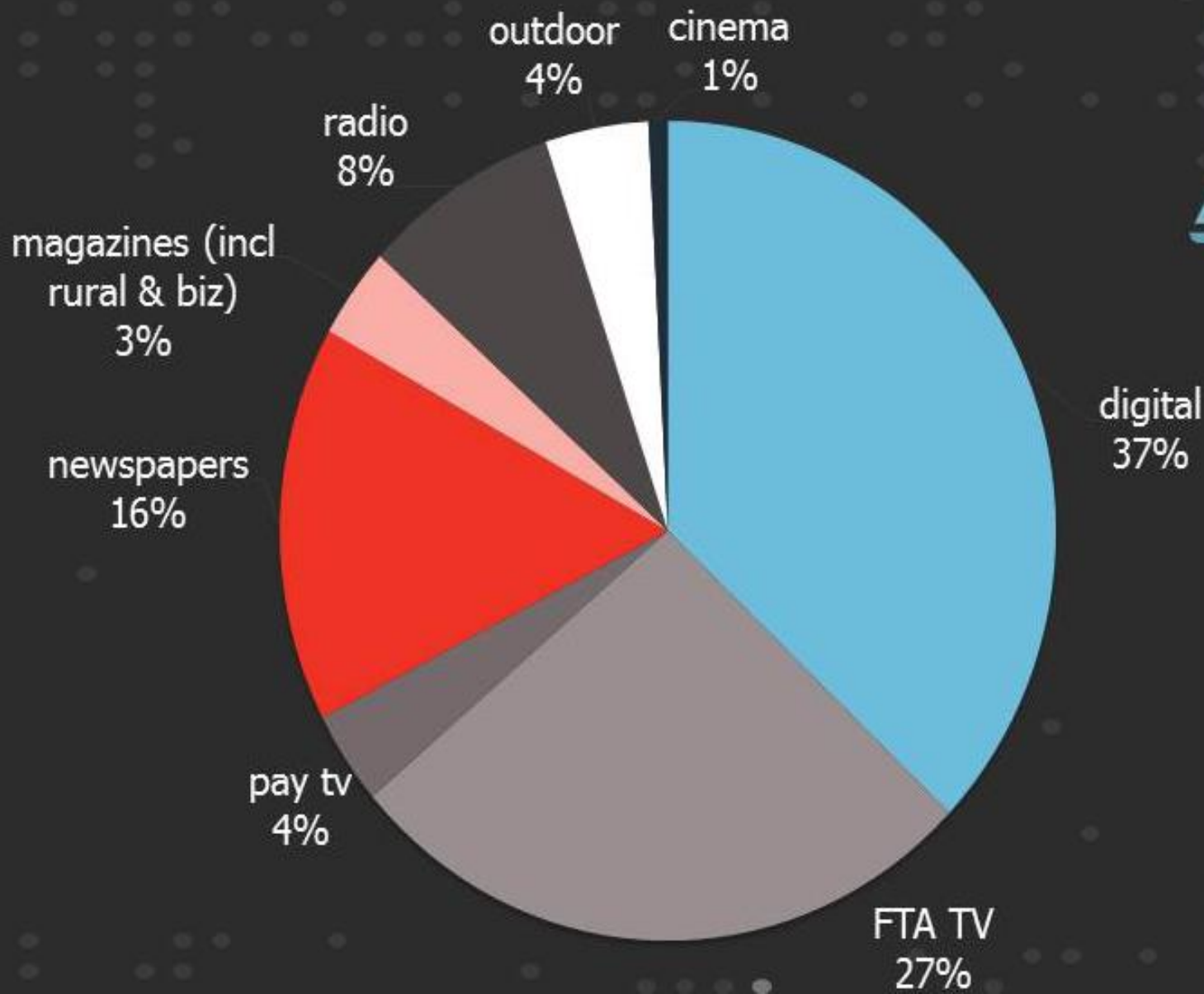
Entertainment
& Leisure



7.6%

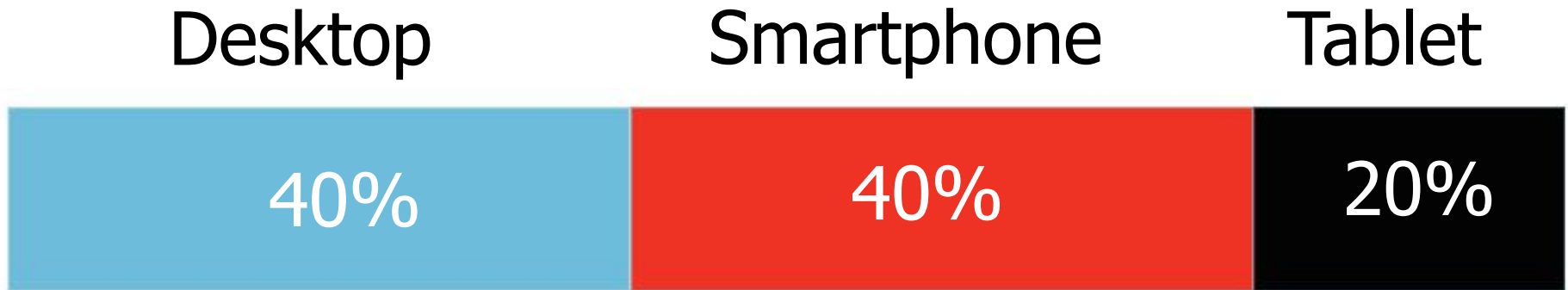
Share

Australian Advertising Spend 1H 2014



Time Shift : Device Shift

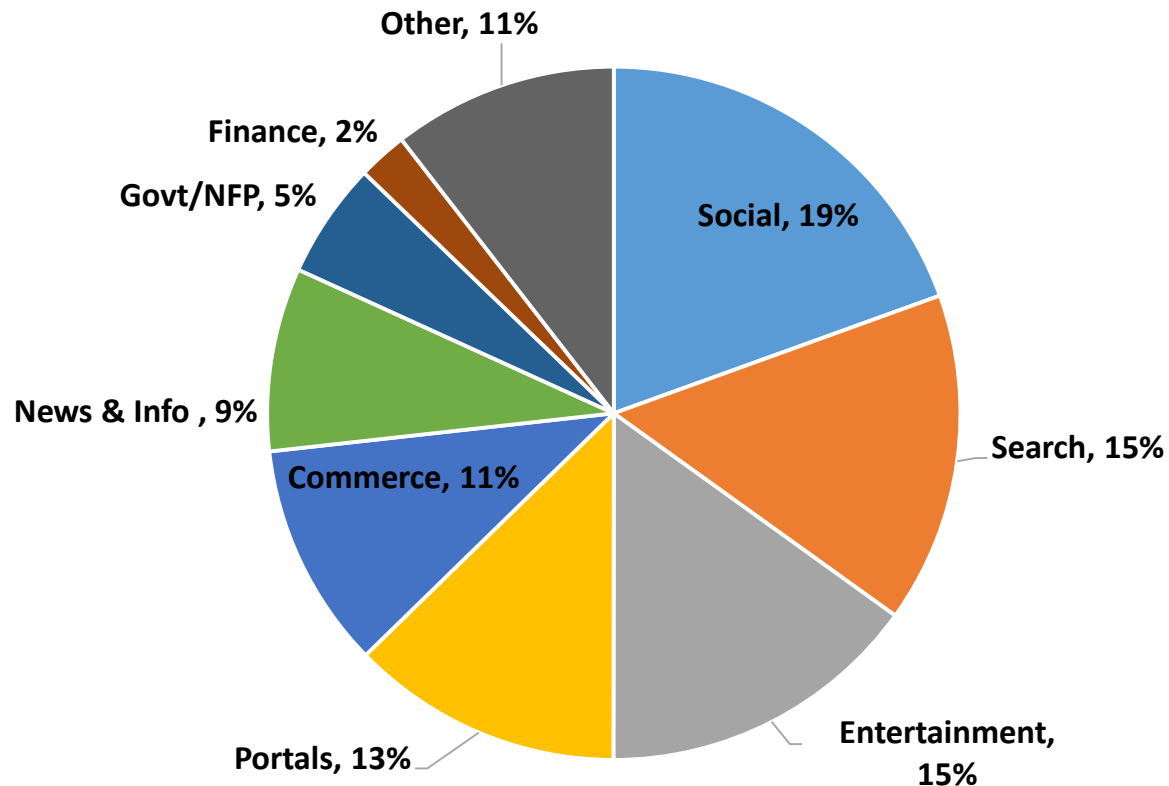
Digital Time Split in Dec 2014



Apps Dominant

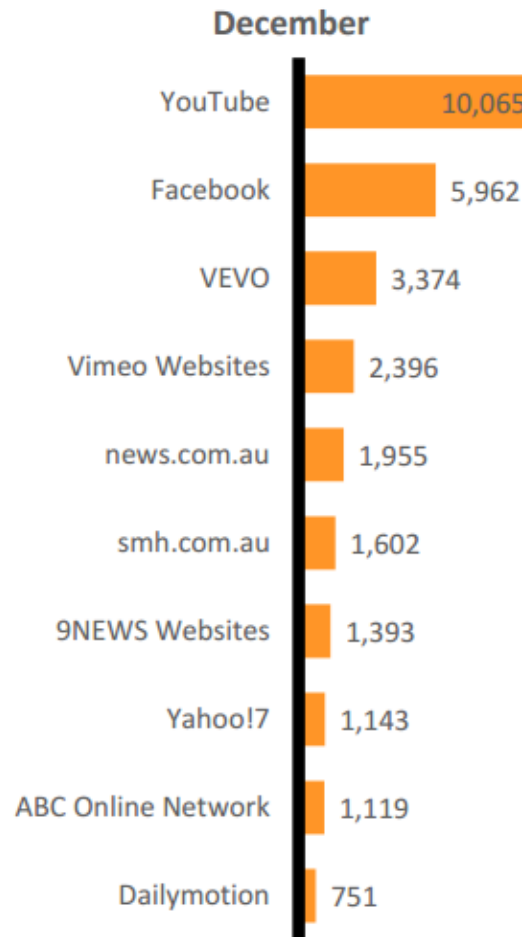
But Mobile Browsing Looks a Lot Like Browsing

Phone Browsing By Category



Top Brands For Video Streaming on Desktop (browsing)

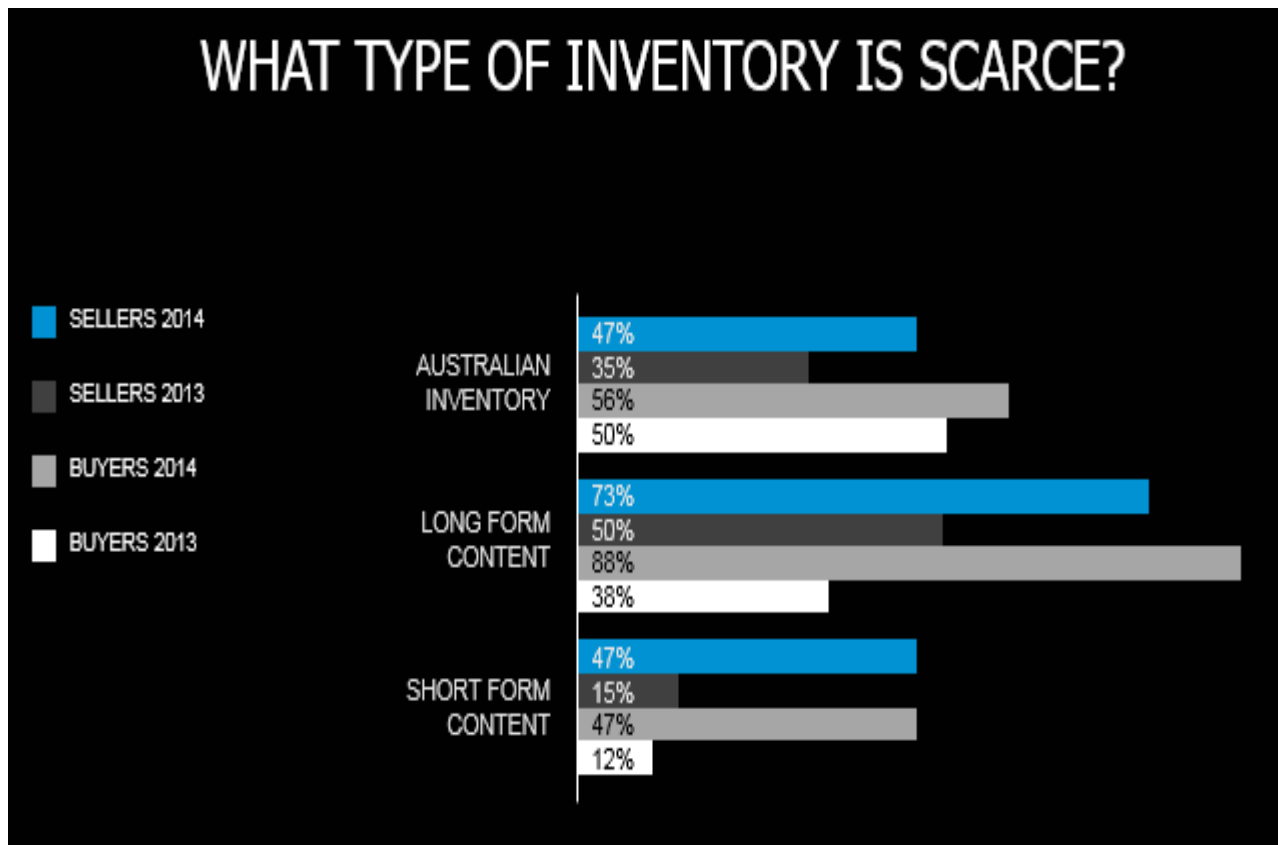
Mix of Local & Global Players



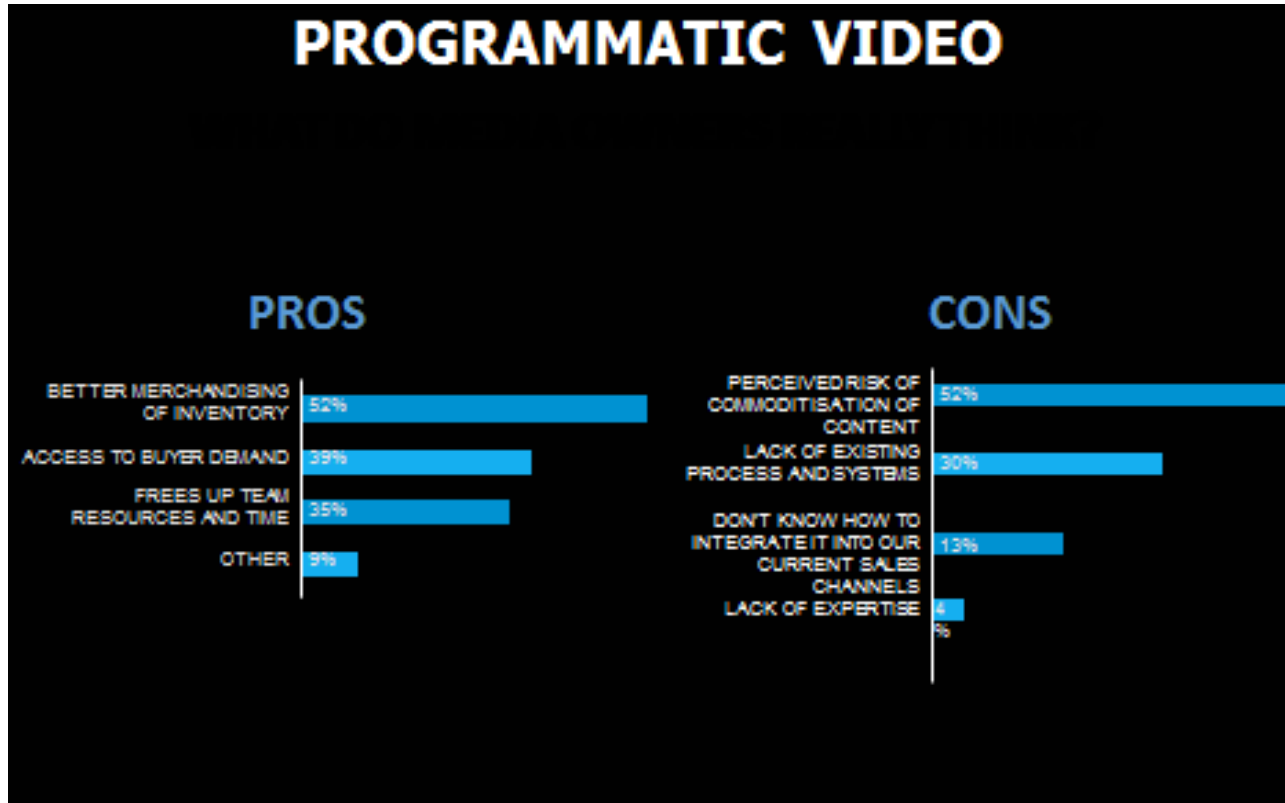
Source: Nielsen Online Ratings Dec 14, Streaming Unique Audience ('000)

Digital Video is in demand

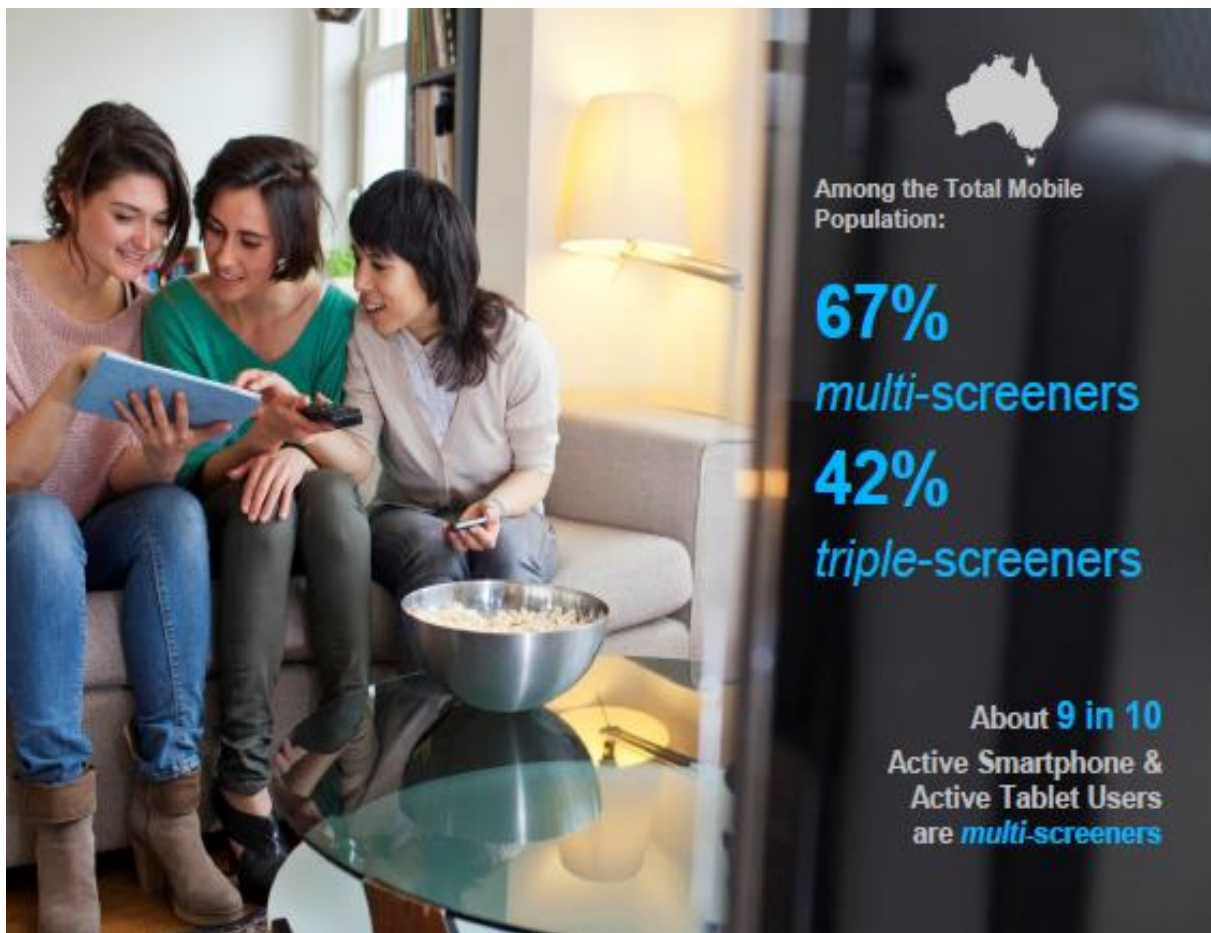
Scarcity - An Industry Issue



Digital Video is in demand



Triple Screening is the new Black



93%
MULTI-TASK
USING THEIR
SMARTPHONE

56%
HAVE USED THEIR
SMARTPHONES TO FIND
RELATED CONTENT
DURING THEIR MULTI-TASKING
BEHAVIOUR

Source: Telstra Smartphone & Tablet Index 2014 Report

Triple Screening is the new Black



HAVE DONE
SO TO FIND
RELATED CONTENT
(AMONG THOSE WHO
HAVE MULTI-TASKED
EACH MEDIA):

37%

37%

41%

42%

MULTI-TASKED
USING THEIR
SMARTPHONE
(AMONG
MULTI-TASKERS):

80%

29%*

24%

23%



WATCHED
FREE TV



WATCHED
SUBSCRIPTION TV



WATCHED
INTERNET TV



PLAYED VIDEO
GAMES

Source: Telstra Smartphone & Tablet Index 2014 Report

Know the time, place, format and device choice of your consumer across the day

3 in 4

own/use a **smartphone**



1 in 2

own/use a **tablet**



76%



49%

Source: Telstra Smartphone & Tablet Index 2014 Report

What's Next?

- The digital media and marketing industry thrives in a state of continual transformation.
- Integration matters deeply to marketers who want to make better use of their data and technology.
- Cross-channel initiatives such as measurement, engagement and targeting are critical.

Walking the Cross Channel Walk

- 1) Create a data strategy
- 2) Prioritize integration
- 3) Banish silos

**Align your strategy and marketing operations around
the customer journey**



Defining the future of digital advertising

IAB Australia empowers the media and marketing industry to thrive in the digital economy by generating innovative tools and education to help companies deliver the benefits of ad funded interactive experiences to Australians.