

IAB AUSTRALIA MOBILE LANDSCAPE STUDY

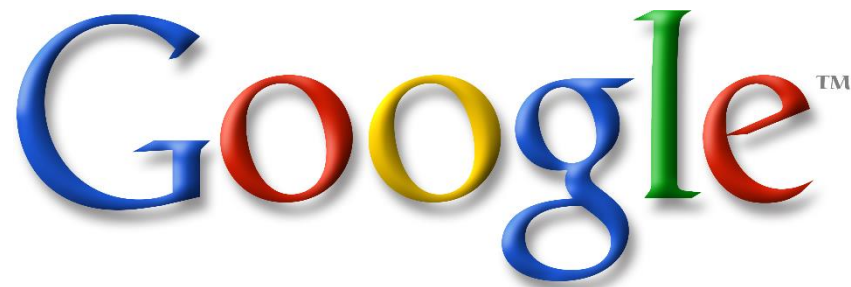
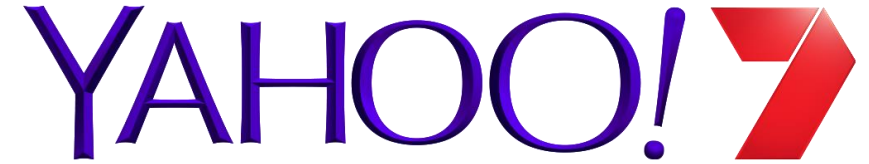


2015



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Study Overview

Background

Hoop Group was asked to conduct the 3rd annual IAB Australian mobile landscape study. The study was first undertaken in 2013, and continued in 2014.

Methodology

The study was conducted through a 15-minute online survey and was undertaken by 350 people.

The survey was sent out to representatives of the advertising industry utilising databases from the IAB and Hoop Group.

All respondents were screened for their position in the industry and their involvement and knowledge of mobile advertising.

What Has Happened in the Last 12 months?

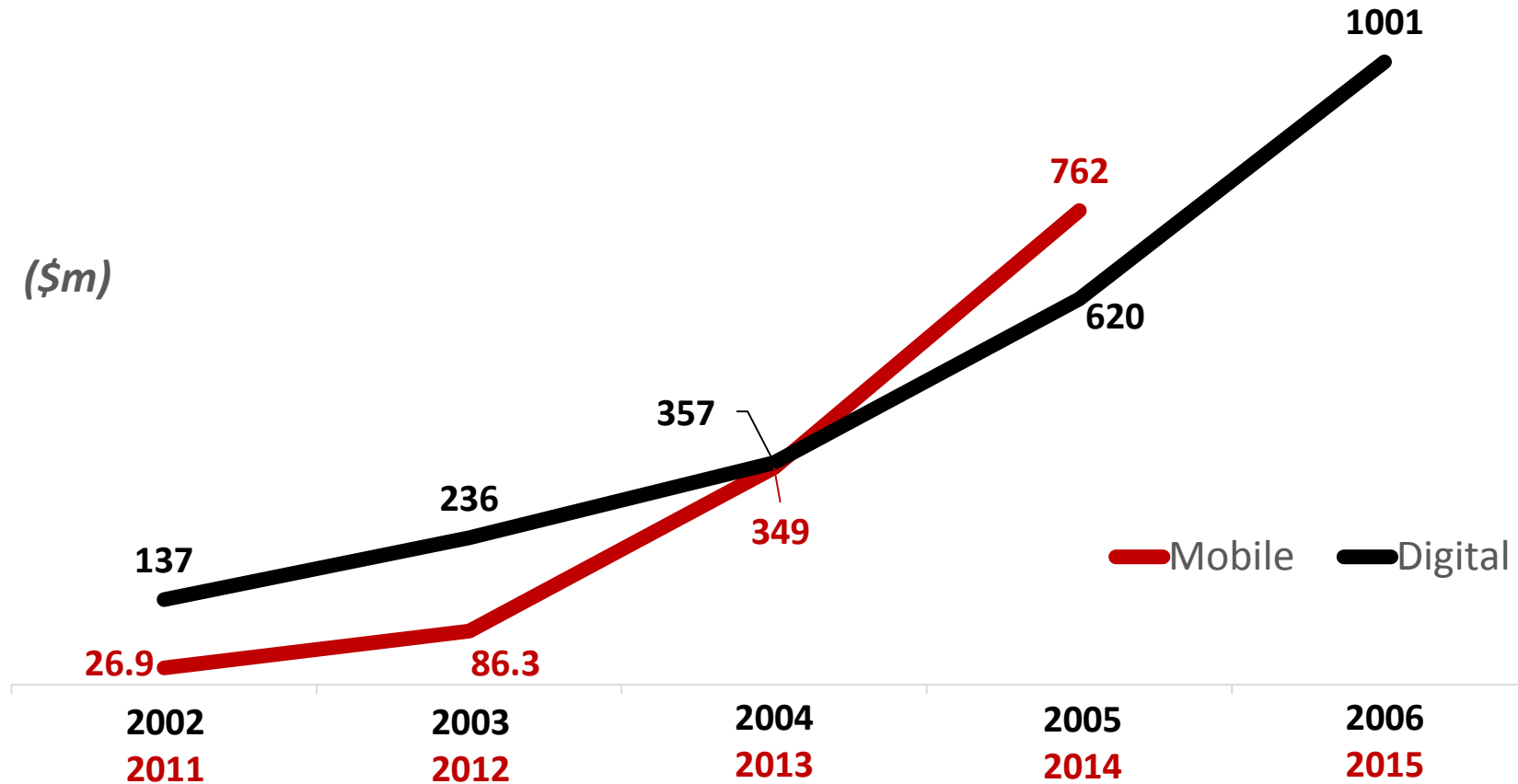


Revenue Growth



Consumer Growth

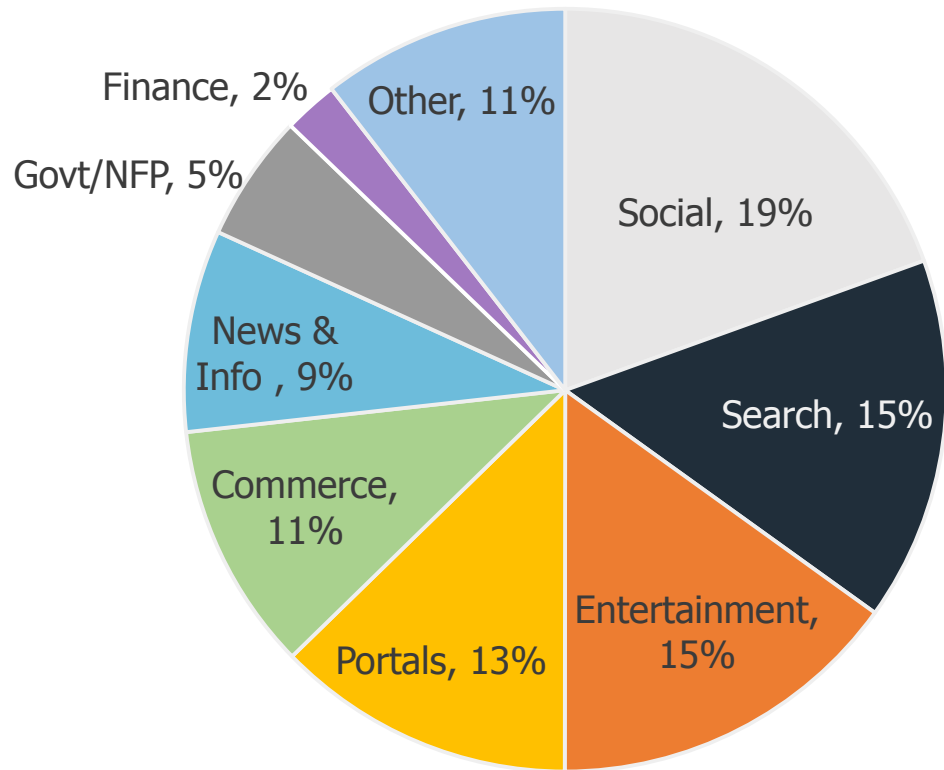
Mobile Ad Revenue up 118% in CY14



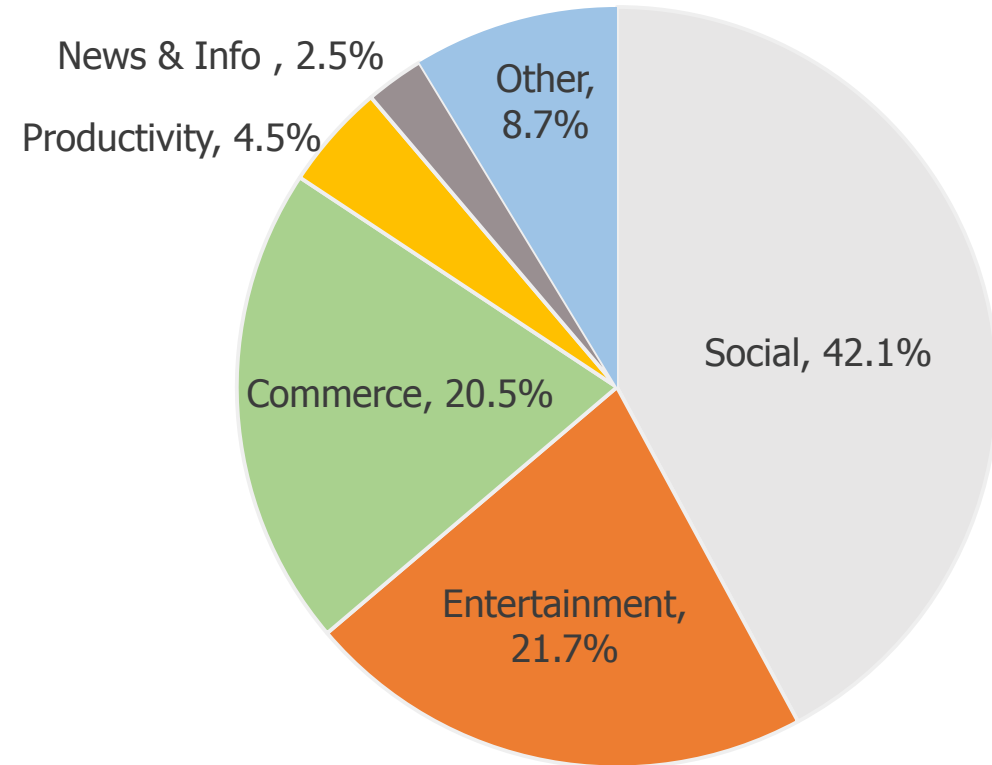
From IAB/PWC Online Advertising Expenditure Report Dec 14

Mobile More than 50% of Digital Time

Phone Browsing Time %



Phone Application Time %



Market measurement & understanding of consumer habits has increased significantly in last 12 months



MOBILE LANDSCAPE 2015 – THE RESULTS

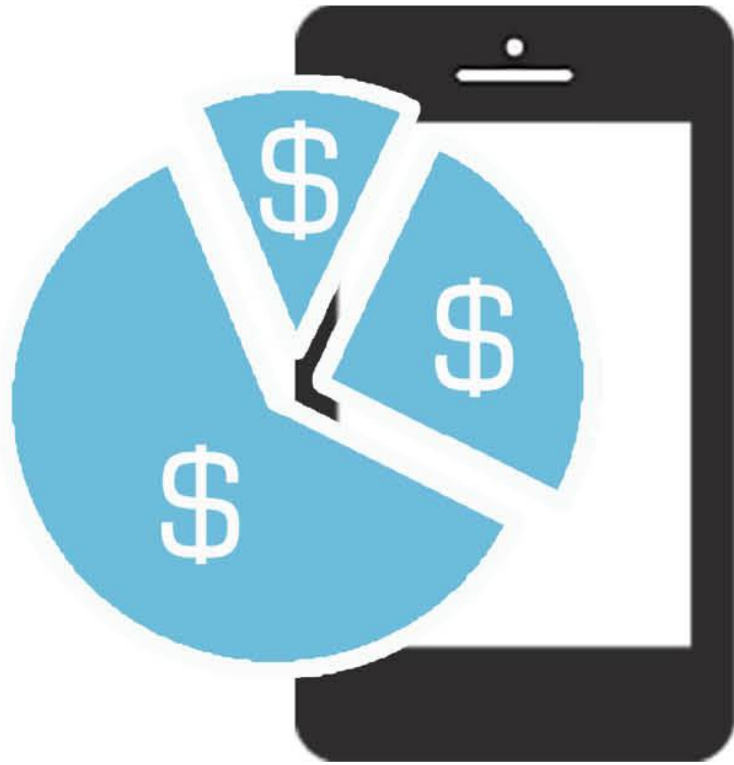
Graeme Uhd

Managing Director - Insights & Strategy

Hoop Group

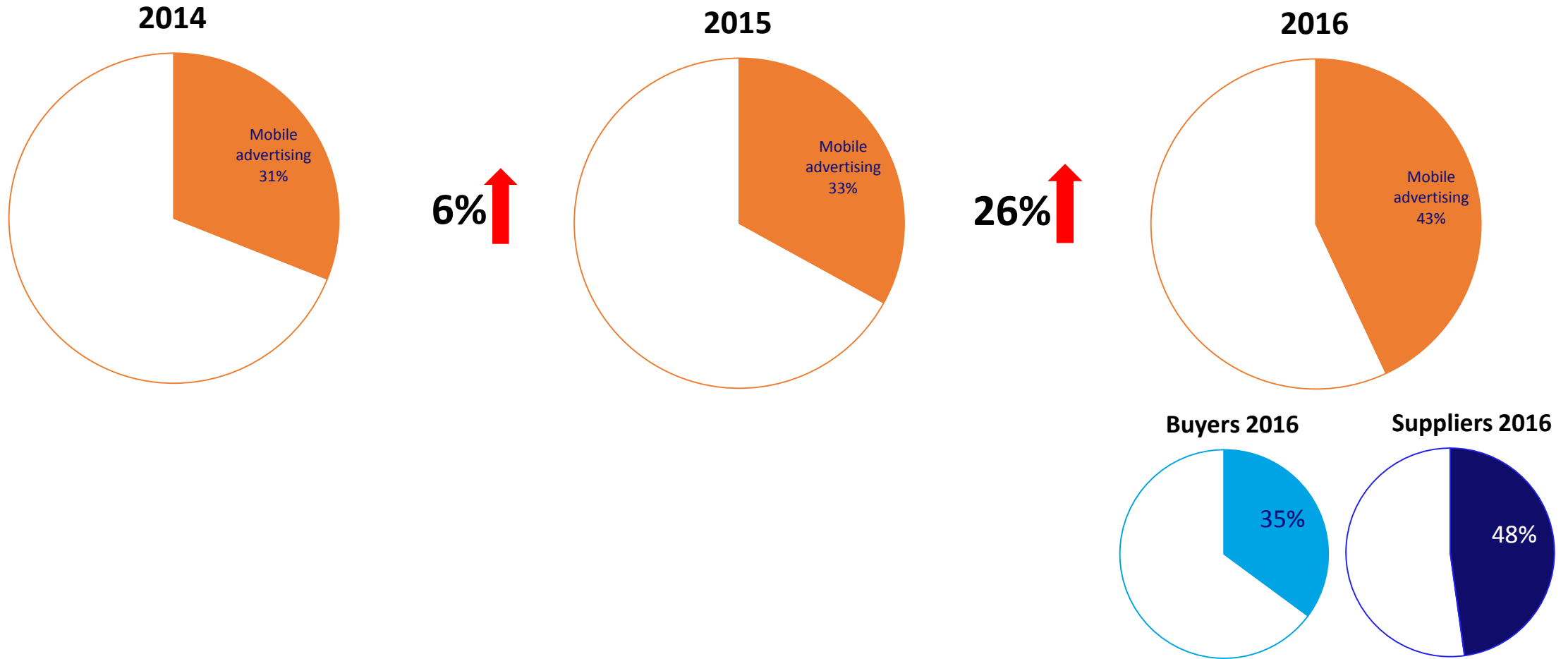
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Mobile Advertising Split & Spend

Proportion of Mobile Advertising Spend



Mobile advertising spend had increased since 2014. The figure was projected to rise considerably over the next year.



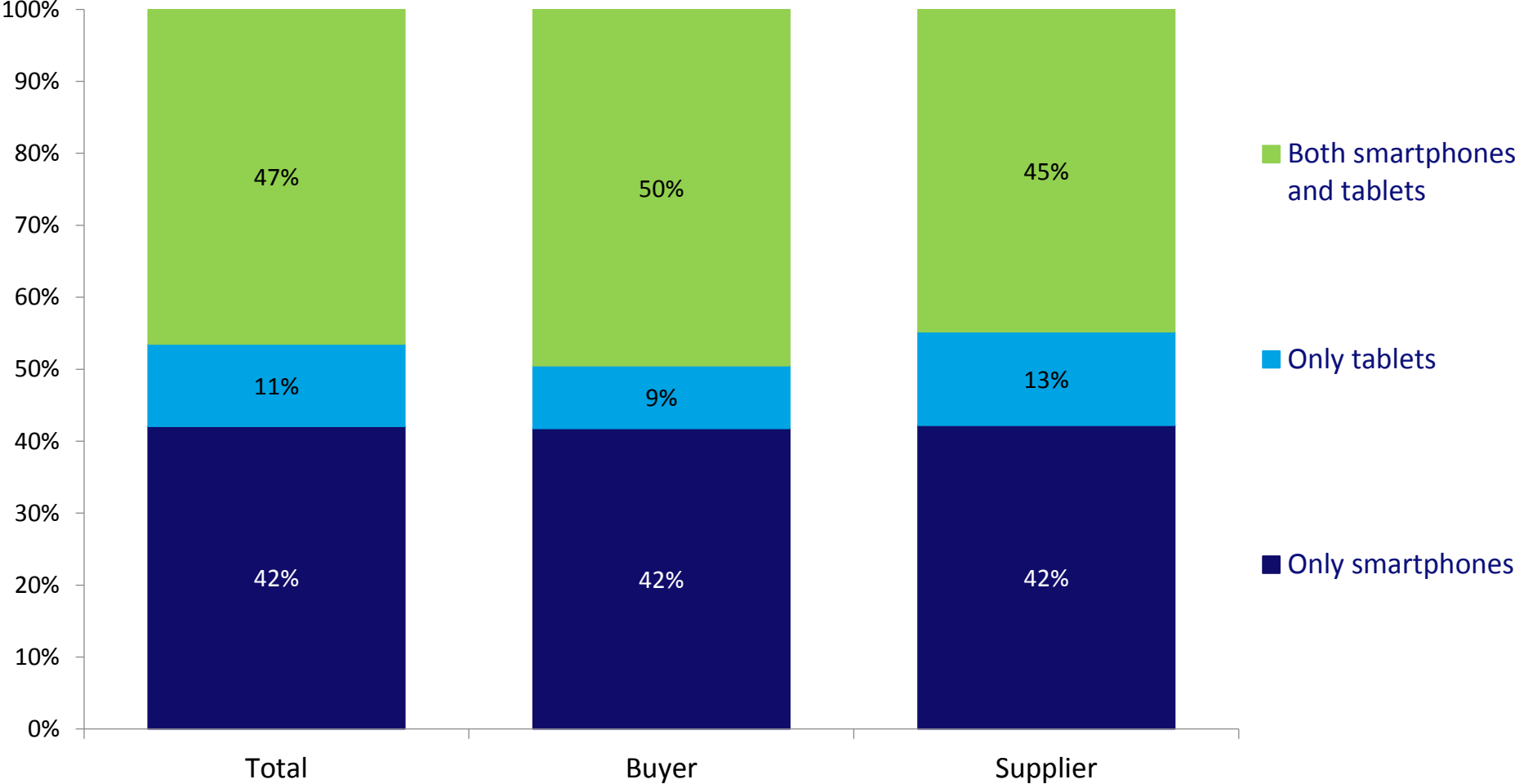
In 2014, what proportion of the total ad dollars on DIGITAL that your company handles was for mobile advertising (smartphones OR tablets)?



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Spend Split Between Smartphones/Tablets

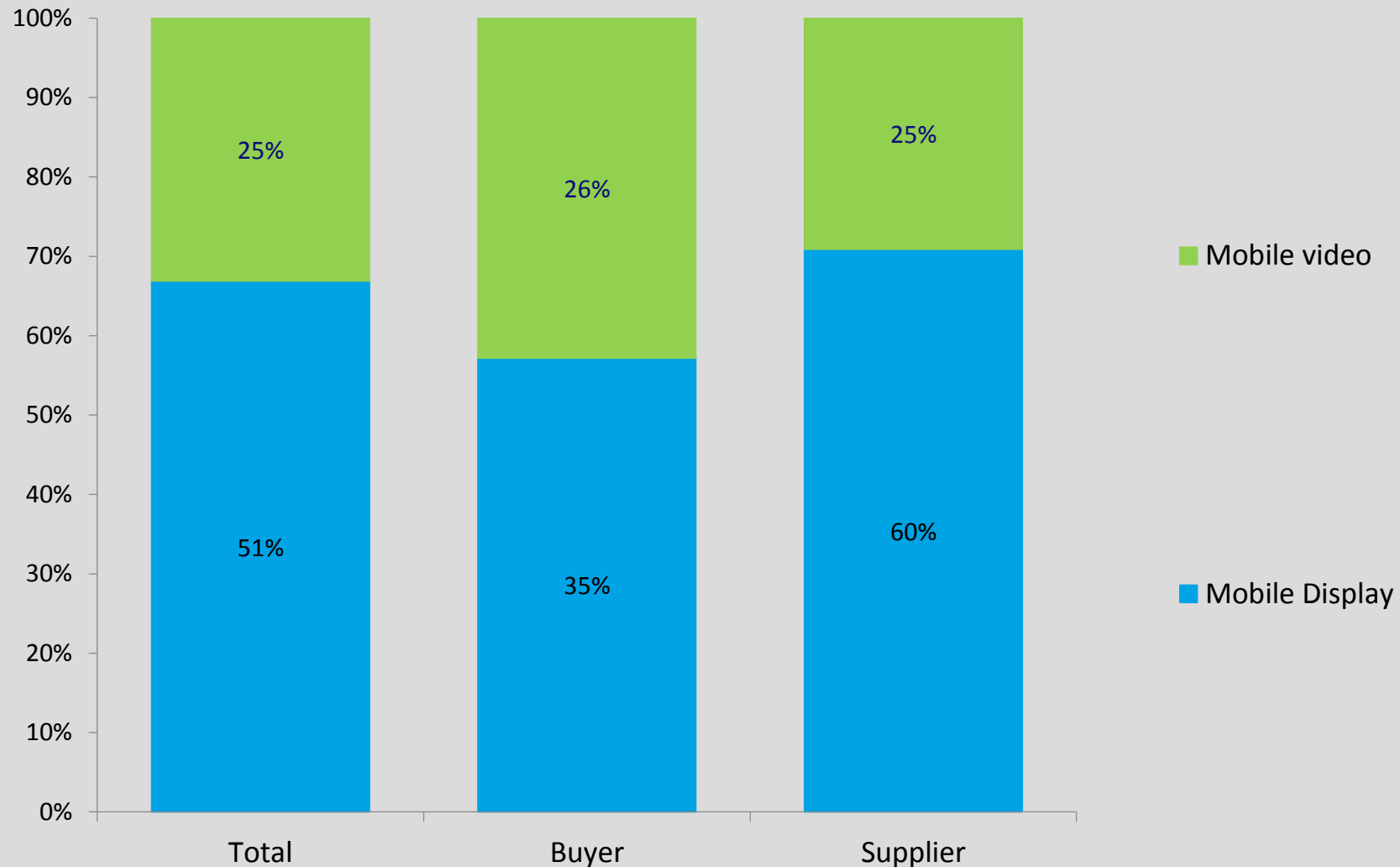


42% of the respondents only did mobile advertising for smartphones. Just on 1/2 did it for both phone and tablet devices.



Of that value for mobile advertising, what was the approximate split between....

Spend Split between Mobile Video and Display



A ¼ of all respondents (both buyer & supplier) were doing mobile video. Mobile search (24%) was higher with buyers (39%) than suppliers (15%).



Of that value for mobile advertising, what was the approximate split between...

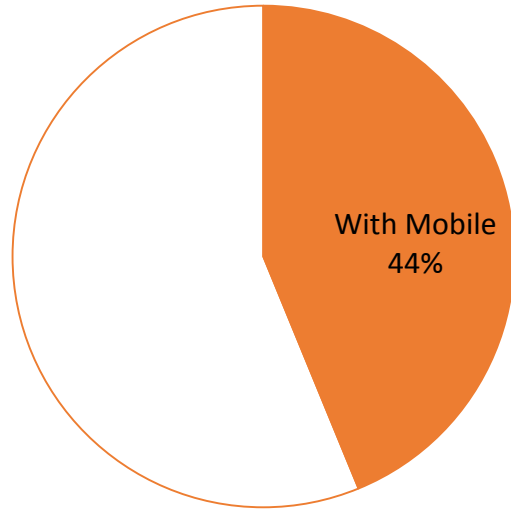


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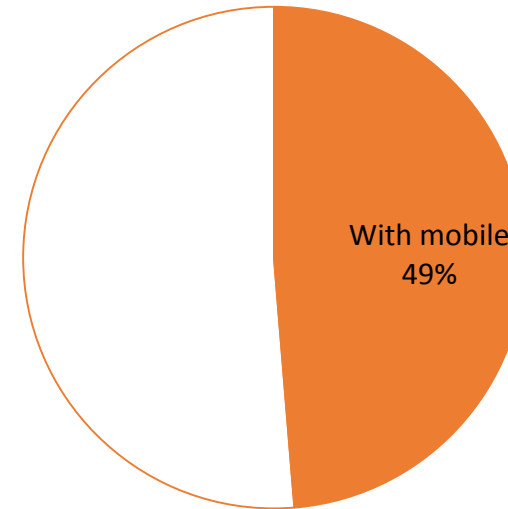
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Ad Campaigns with Mobile Component

2014

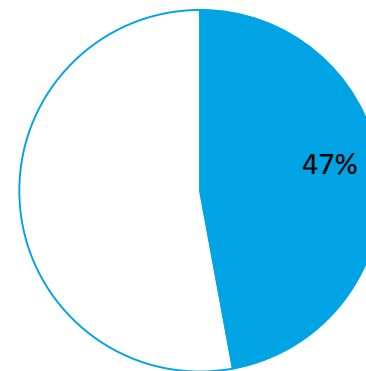


2015

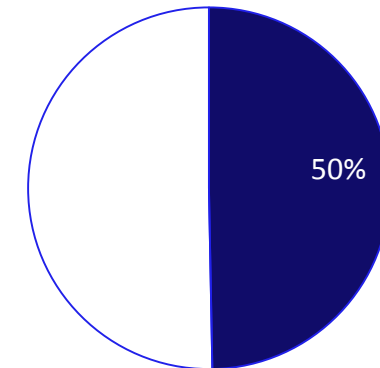


11% ↑

Buyers 2015



Suppliers 2015



Campaigns with mobile had risen 11% since last years survey.



In 2014, what proportion of the ad campaigns your company handled had a mobile (smartphone or tablet) component?

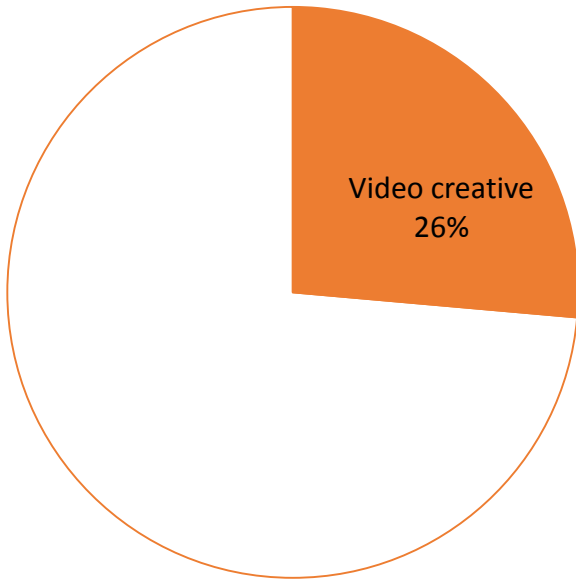


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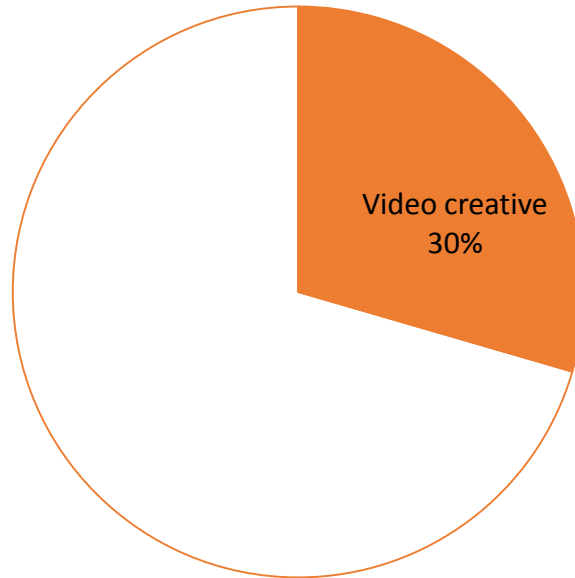
Usage of Mobile Video Creative

2014



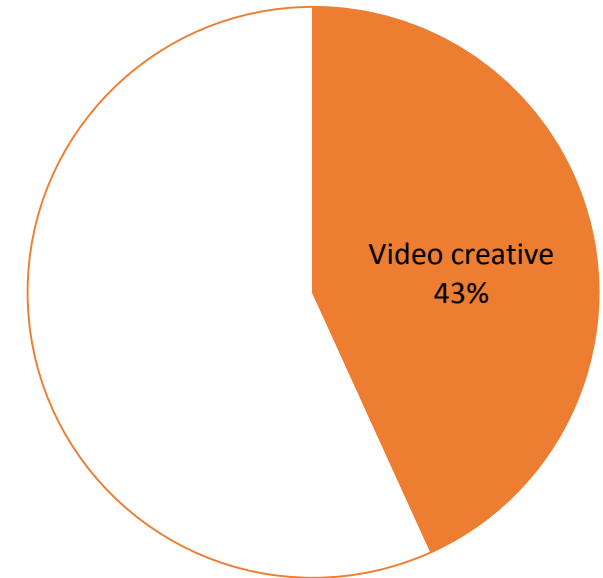
14% ↑

2015



36% ↑

2016



There had been an increase in video creative used since last year (up 14%). This was planned to increase in the next year.



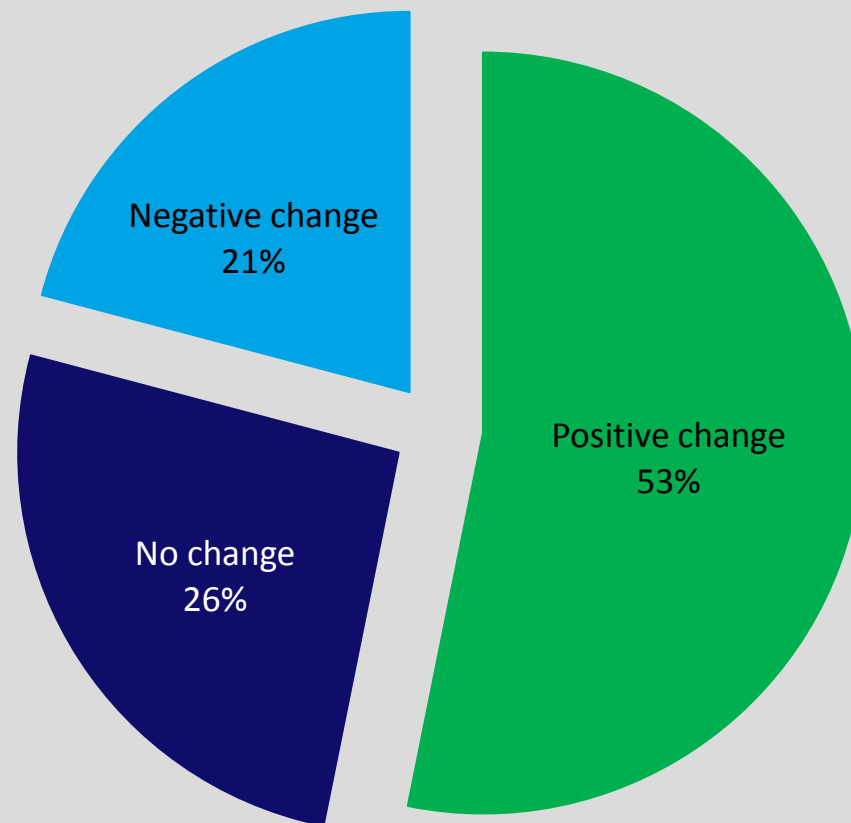
Of the mobile ad campaigns your company handles, approximately what proportion use video creative? In 2016, what proportion do you estimate will use video creative?



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Changes in Mobile CPMs



A $\frac{1}{4}$ of our respondents had seen no change in mobile CPM's, but over a $\frac{1}{2}$ (53%) had seen a positive change.



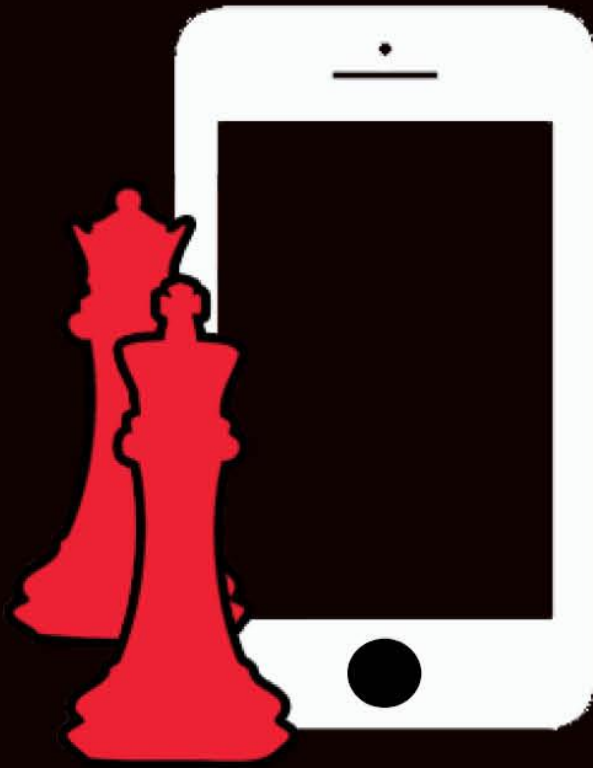
What, if any, change (in % terms positive or negative) have you seen in mobile CPMs over the past 12 months?



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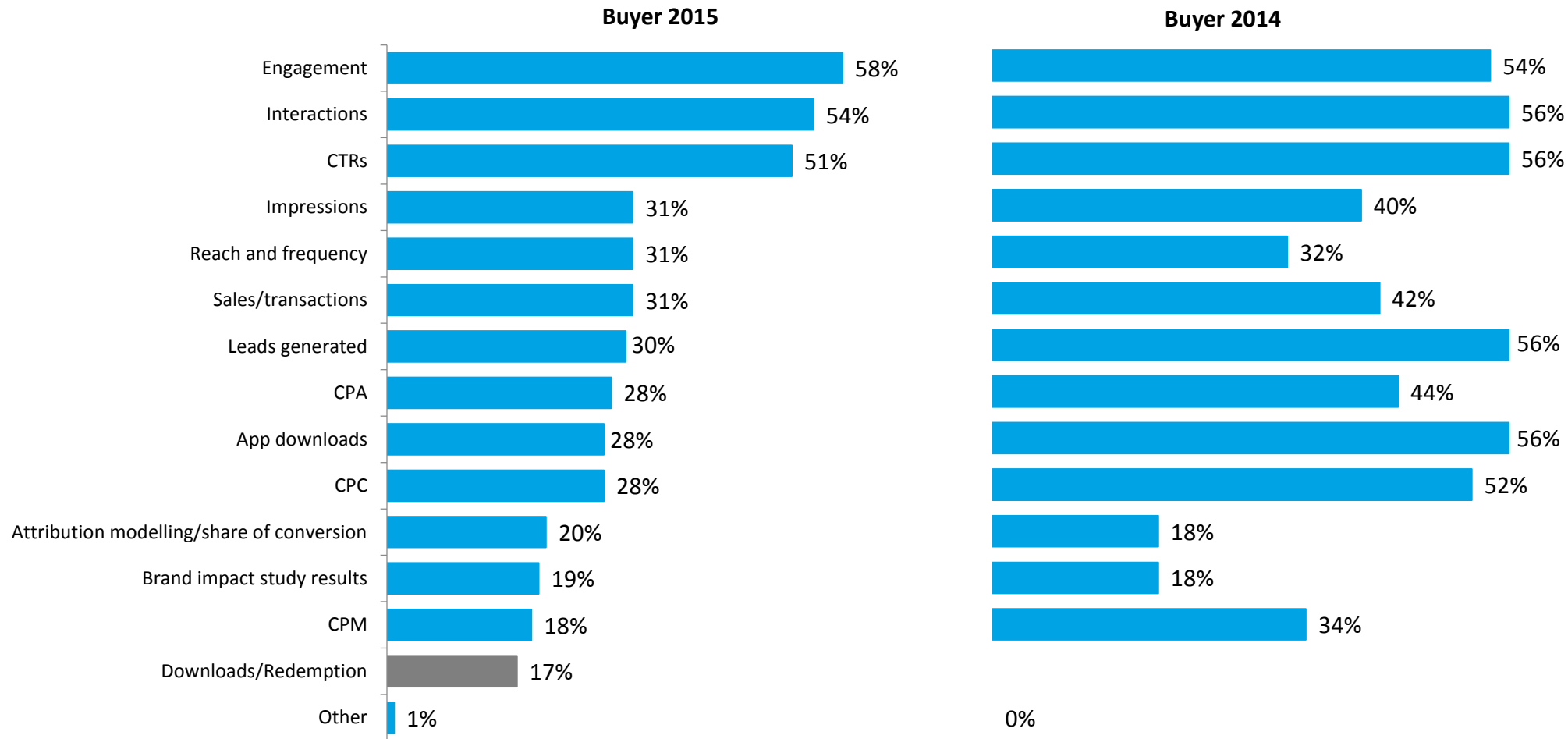
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Mobile Advertising Strategy

Measures Assessing Performance – Buyer



The measures of assessing performance were a little different when compared to 2014. Engagement and interaction still high but lead generation and downloads had decreased (amongst others).



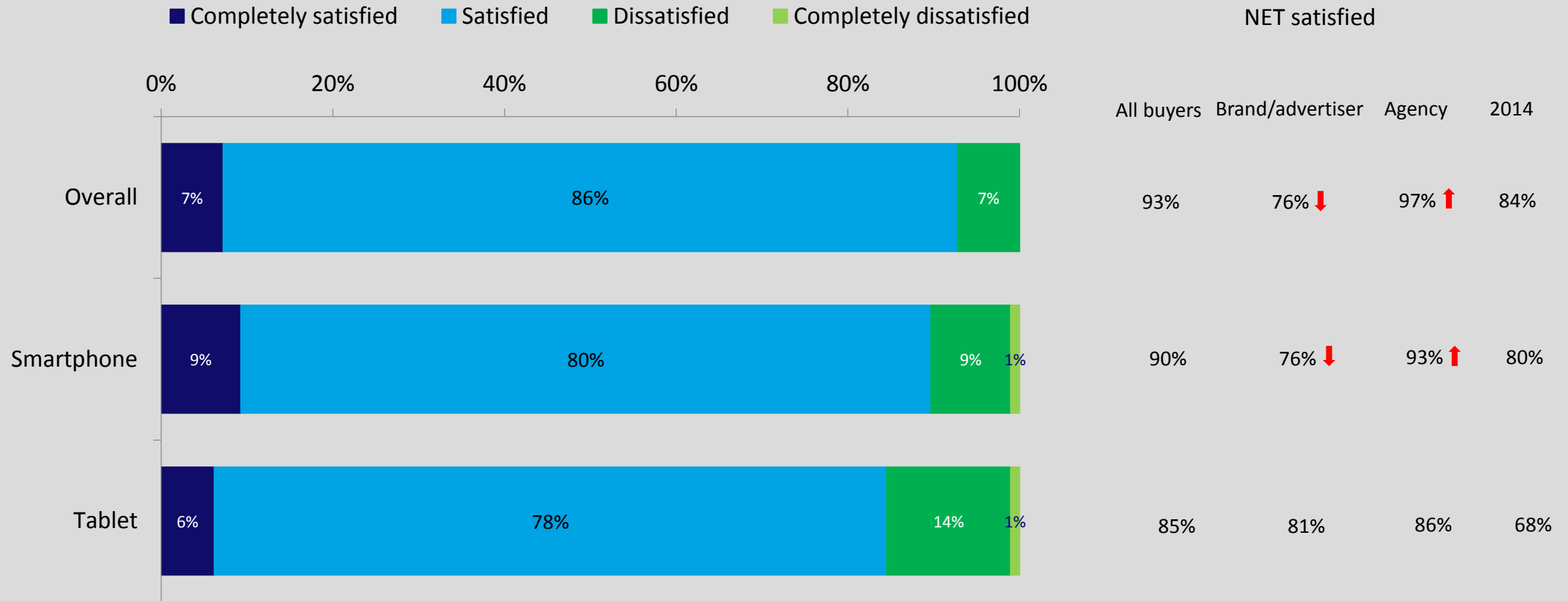
Which of the following did you use as key measures to assess performance against the objectives?



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Satisfaction with Mobile Advertising



Overall Satisfaction with mobile advertising is high and higher than it was in 2014.
Satisfaction with tablet advertising is a little lower as it was last year as well.



How satisfied are you with the results of your mobile advertising activities on tablets, smartphones, and overall across both devices?

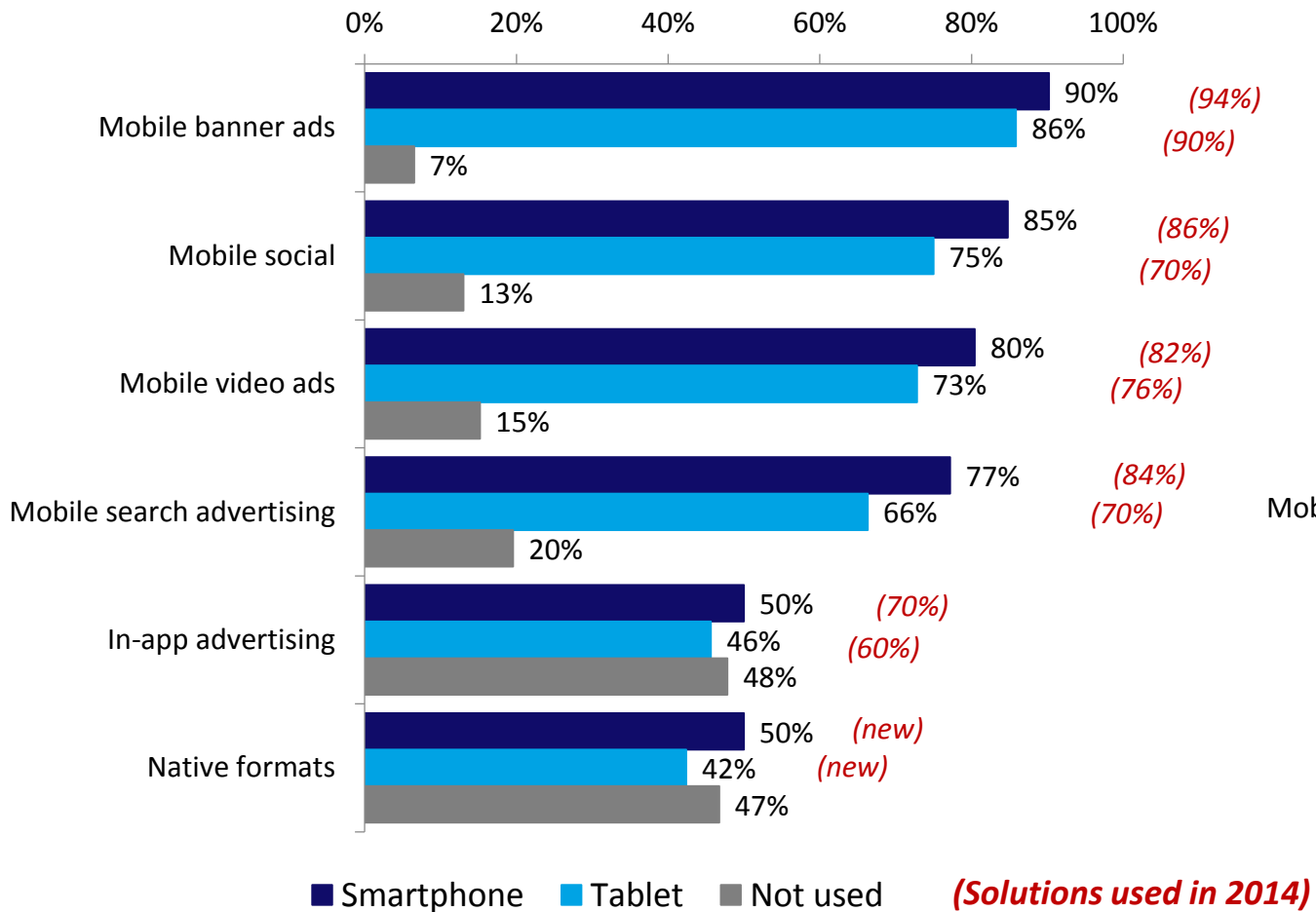


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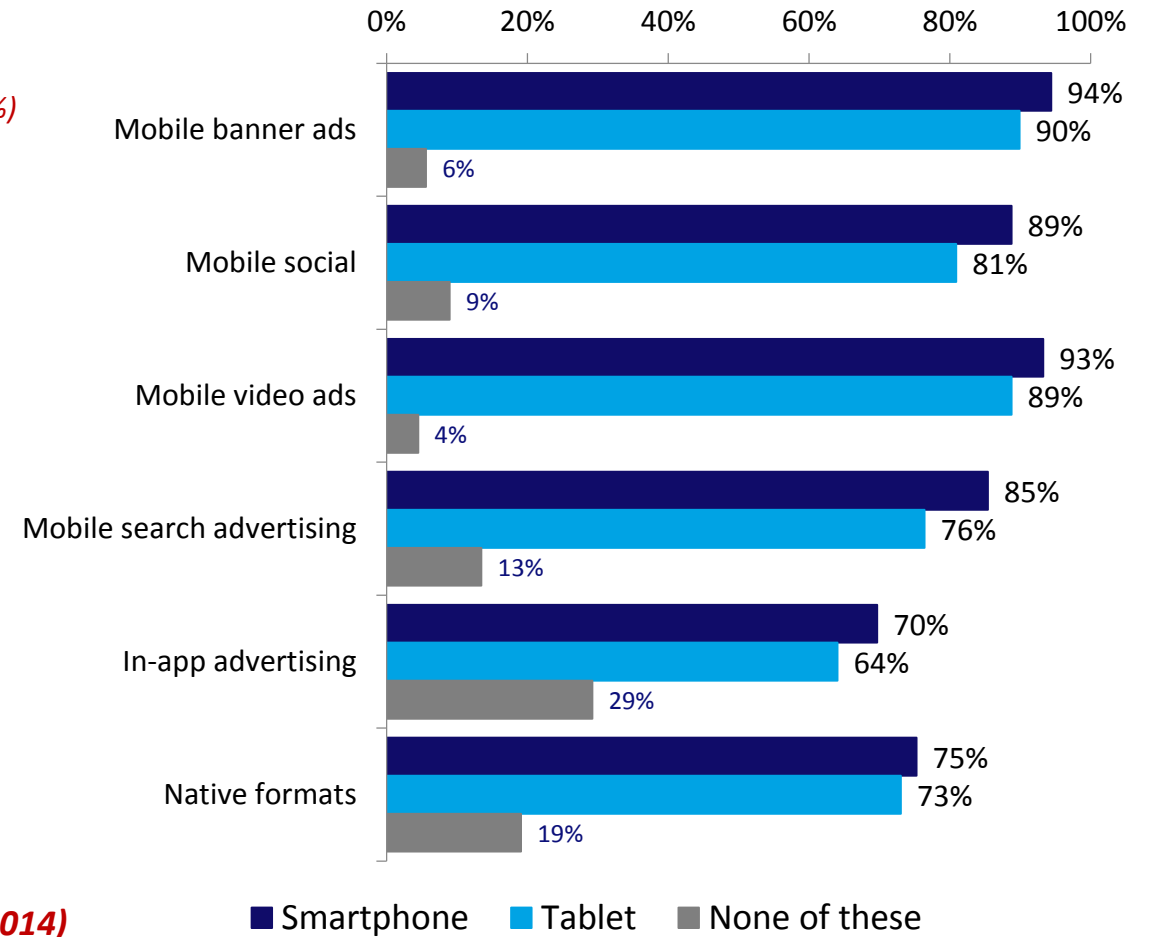
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Advertising Solutions

Advertising solutions used



Advertising solutions planned for future use



The 3 highest used solutions were banners, social and video in 2015. 50% had used 'native' on smartphone (42% on tablet).



Looking at the following advertising solutions which have you used and on which device? And which of these do you expect to use in the next 12 months?

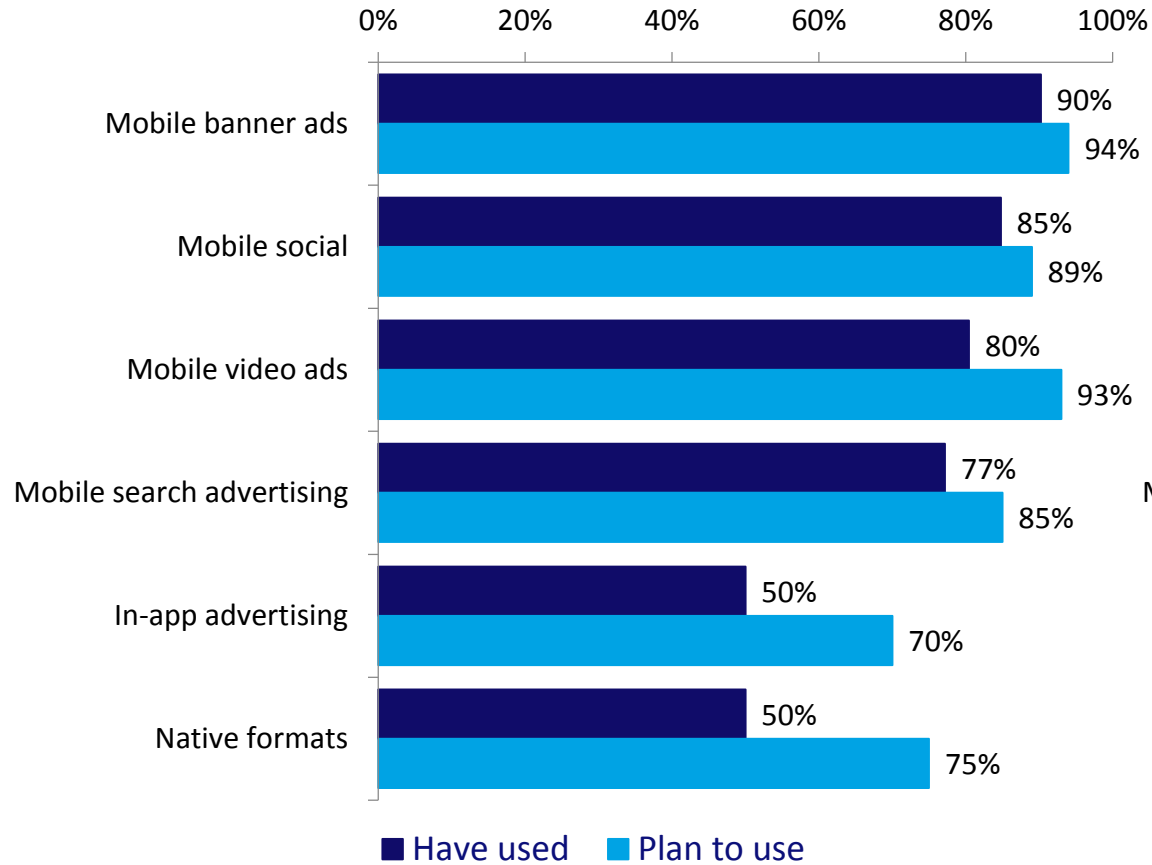


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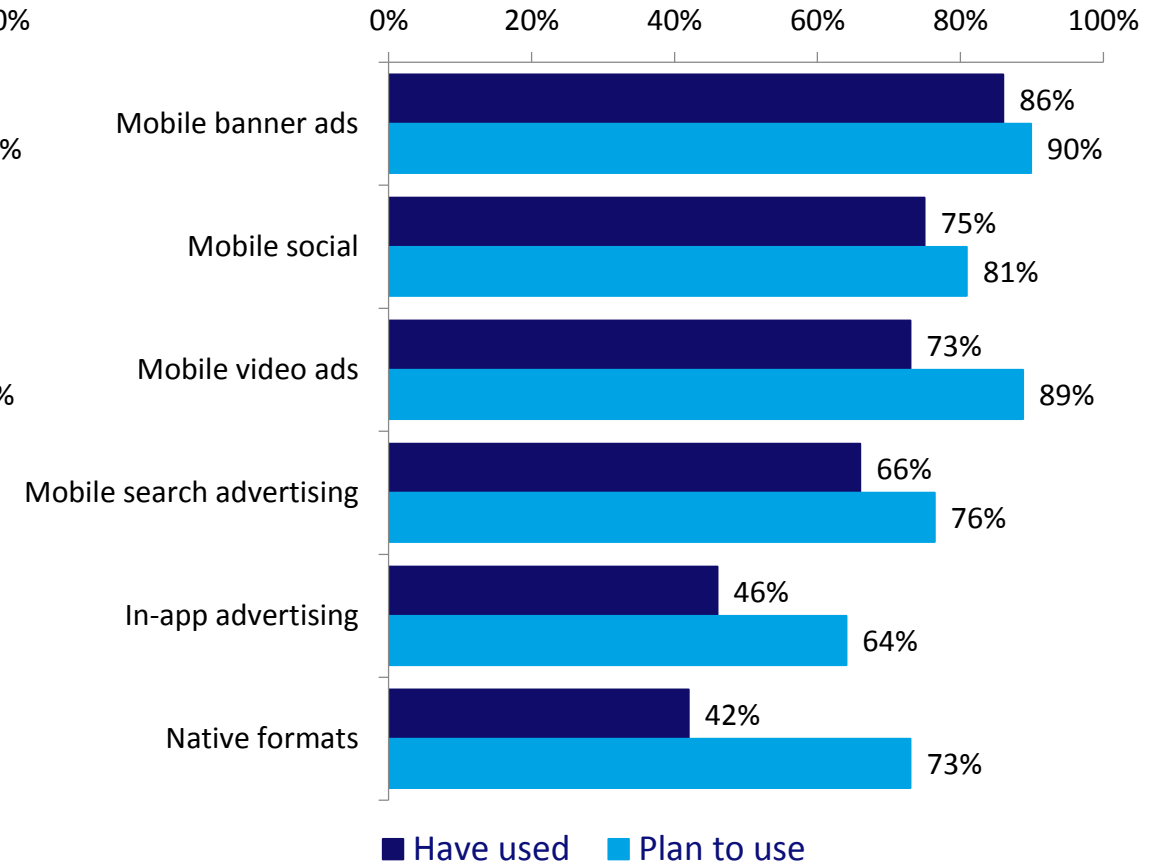
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Advertising Solutions – Have used vs. Plan to use

Advertising solutions - Smartphone



Advertising solutions - Tablet



All buyers plan to use more 'solutions' in the future than they have in the past.



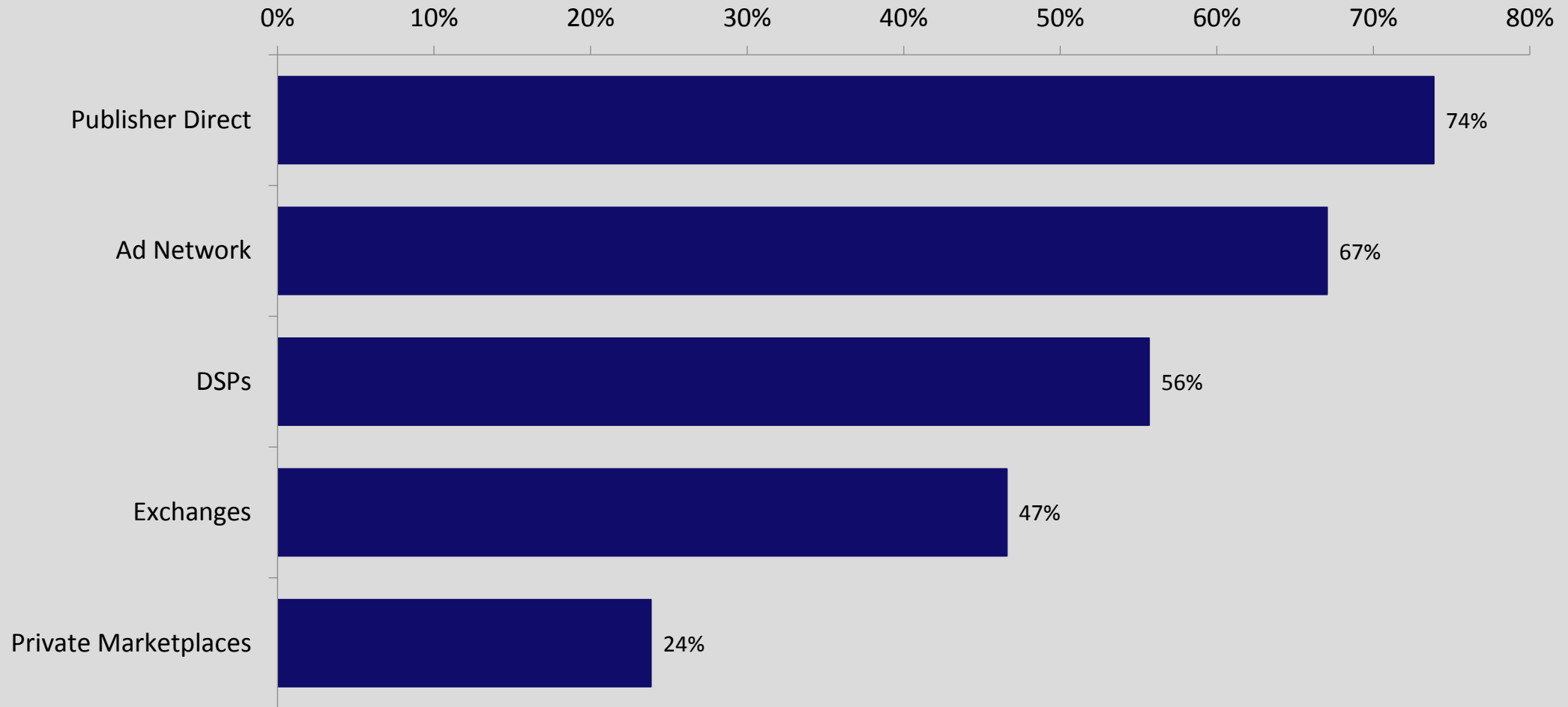
Looking at the following advertising solutions which have you used and on which device? And which of these do you expect to use in the next 12 months?



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Mobile Display Inventory



Buyers used multi suppliers to source inventory. This figure did not significantly change between agencies and clients.



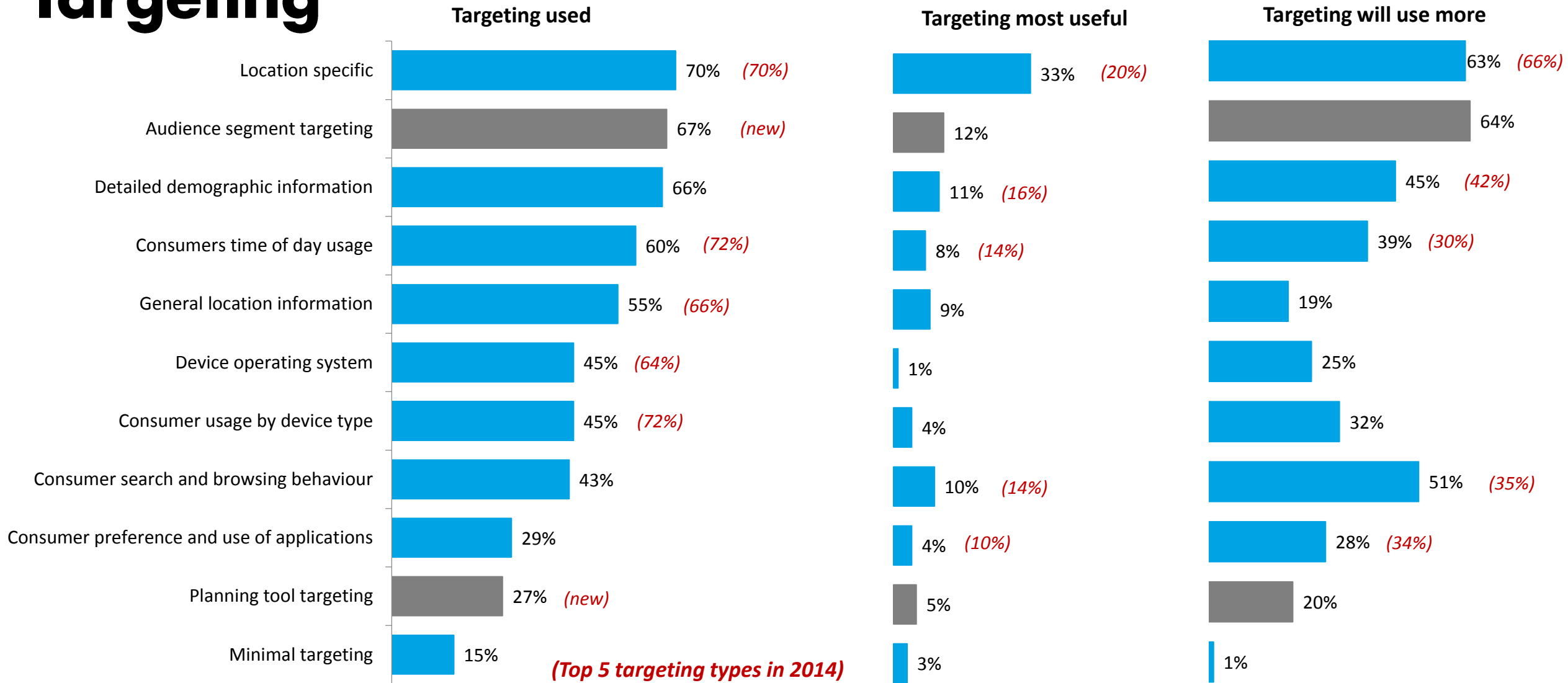
Which of the following are you using to buy mobile display inventory?



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Targeting



Location specific targeting was seen as the most useful targeting option and will be used more in the future.



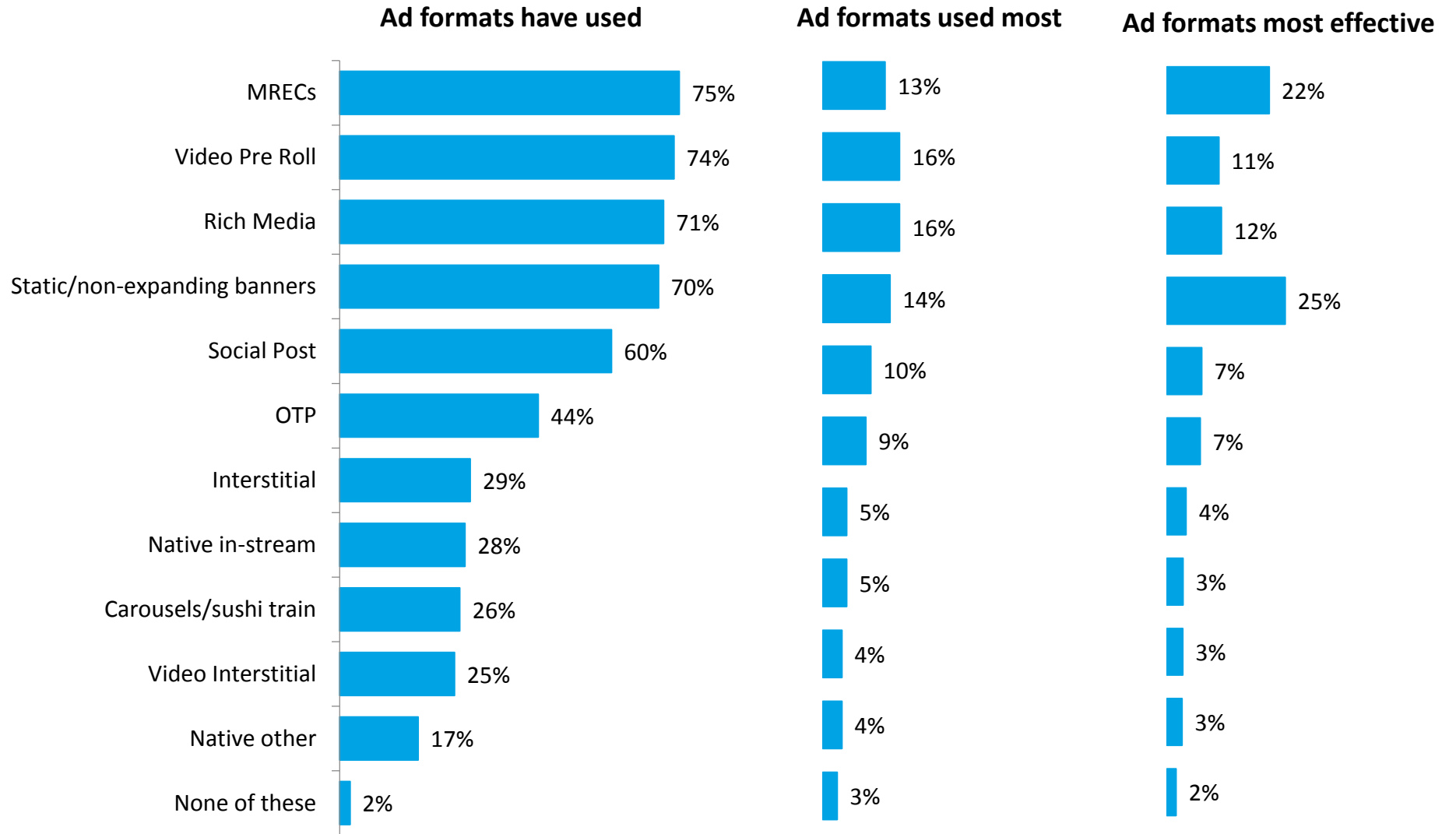
Which types of targeting have you used for your mobile ad campaigns to date? Which of the targeting types you've used has been the most useful? Which types of targeting do you expect to see used more in the next year?



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Ad Formats Used - Buyer



Static banners were seen to be the most effective format.



Which of the following ad formats have you used in your mobile ad campaigns in the last 12 months? And which of these have you used the most? And which of these do you think are the most effective?



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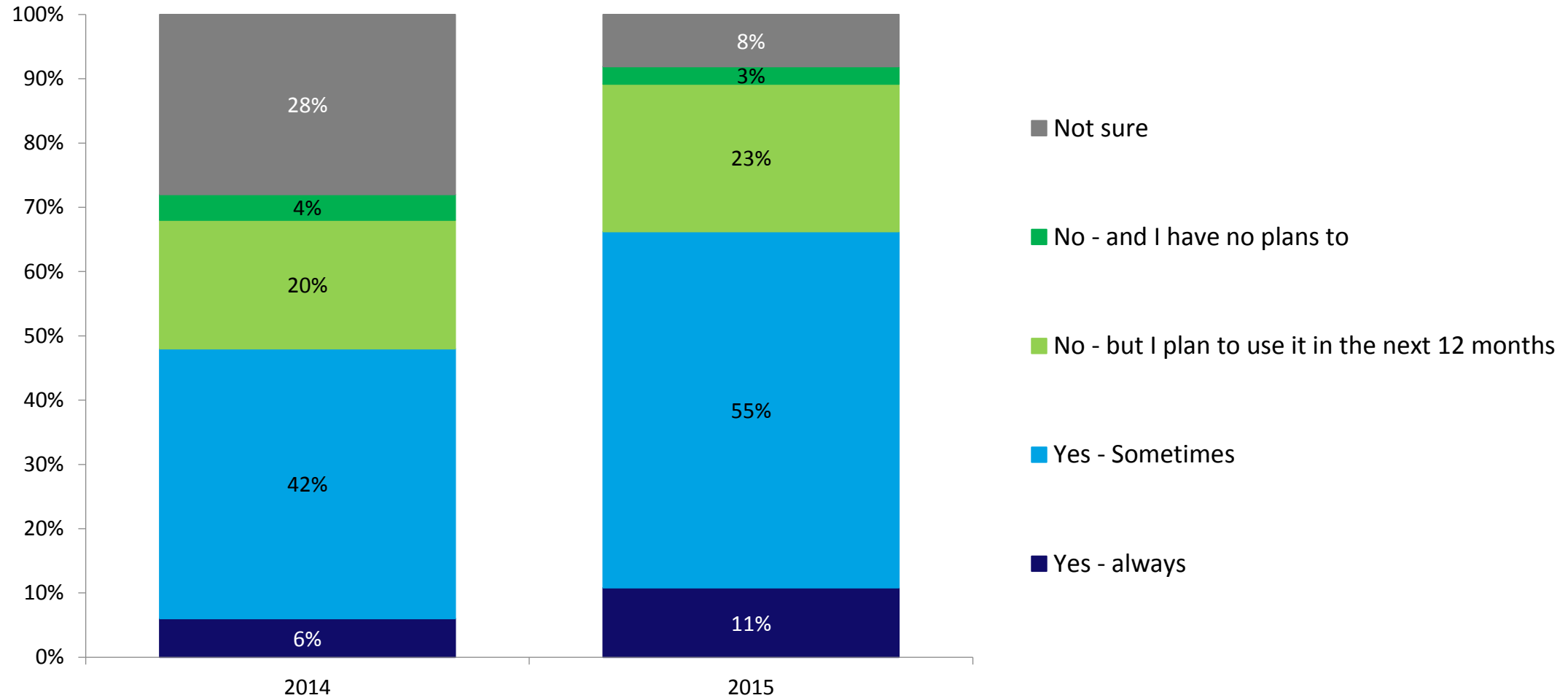
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Mobile Advertising Programmatic

Programmatic Buying



There were more buyers using programmatic services this year compared to last.



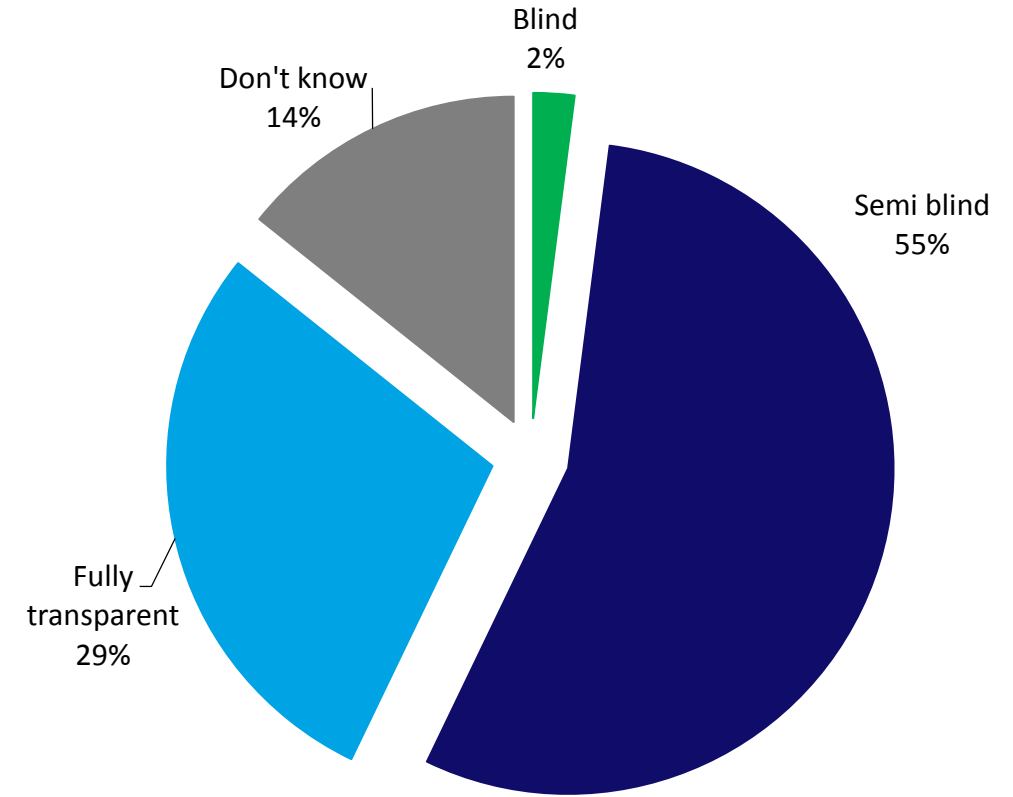
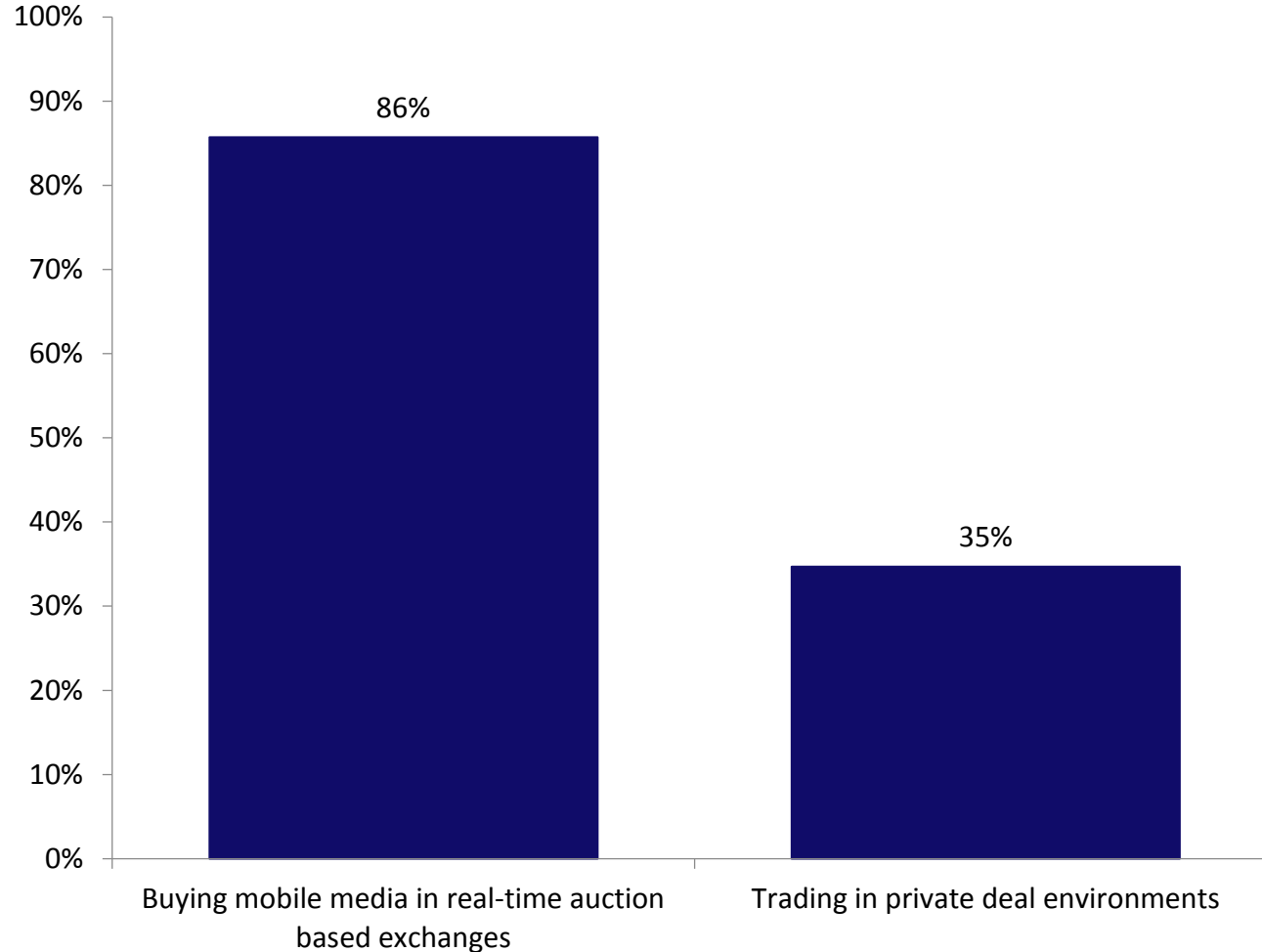
Do you use programmatic buying when purchasing mobile ad placements?



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Type and Transparency of Programmatic Buying



The majority (86%) used real time auction based exchanges, whilst 35% traded in private deal environments.



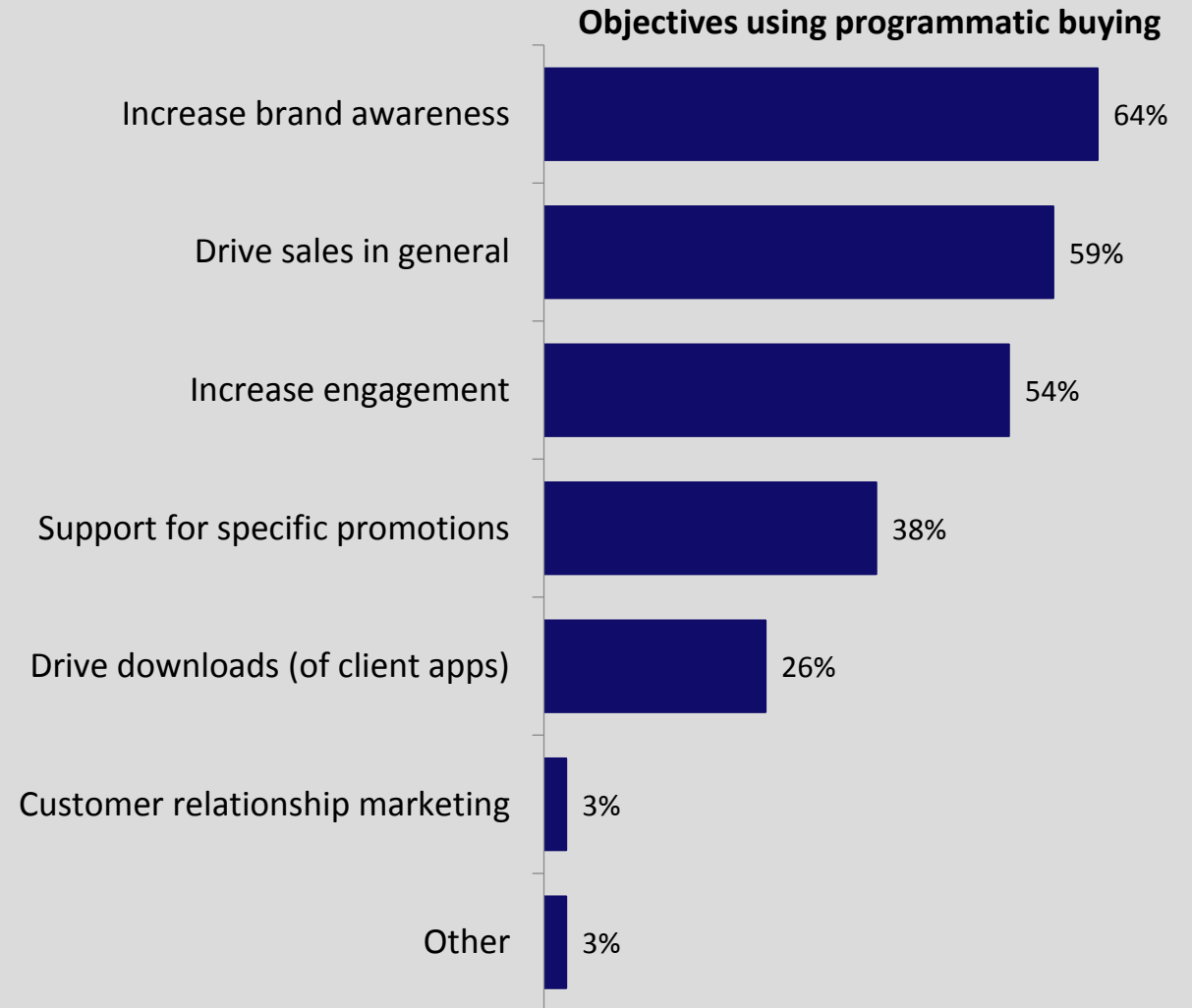
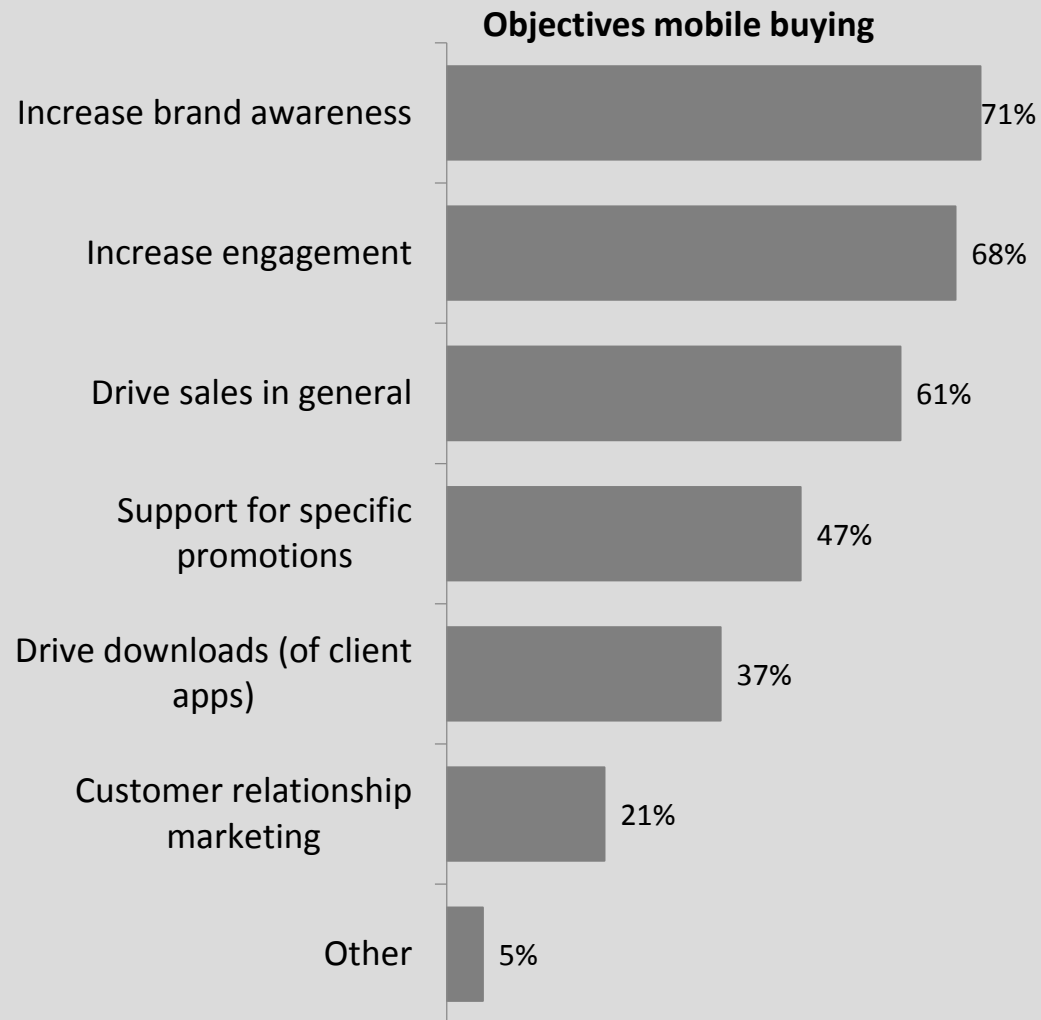
Which of the following explanations best describes the type of programmatic buying you do?
When you buy using programmatic how transparent do you think your buying is?



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Objectives using Programmatic Buying: (general vs. programmatic)



Just under two-thirds (64%) used programmatic buying to drive brand awareness.



What are the objectives when you use programmatic buying for purchasing mobile ad placements?

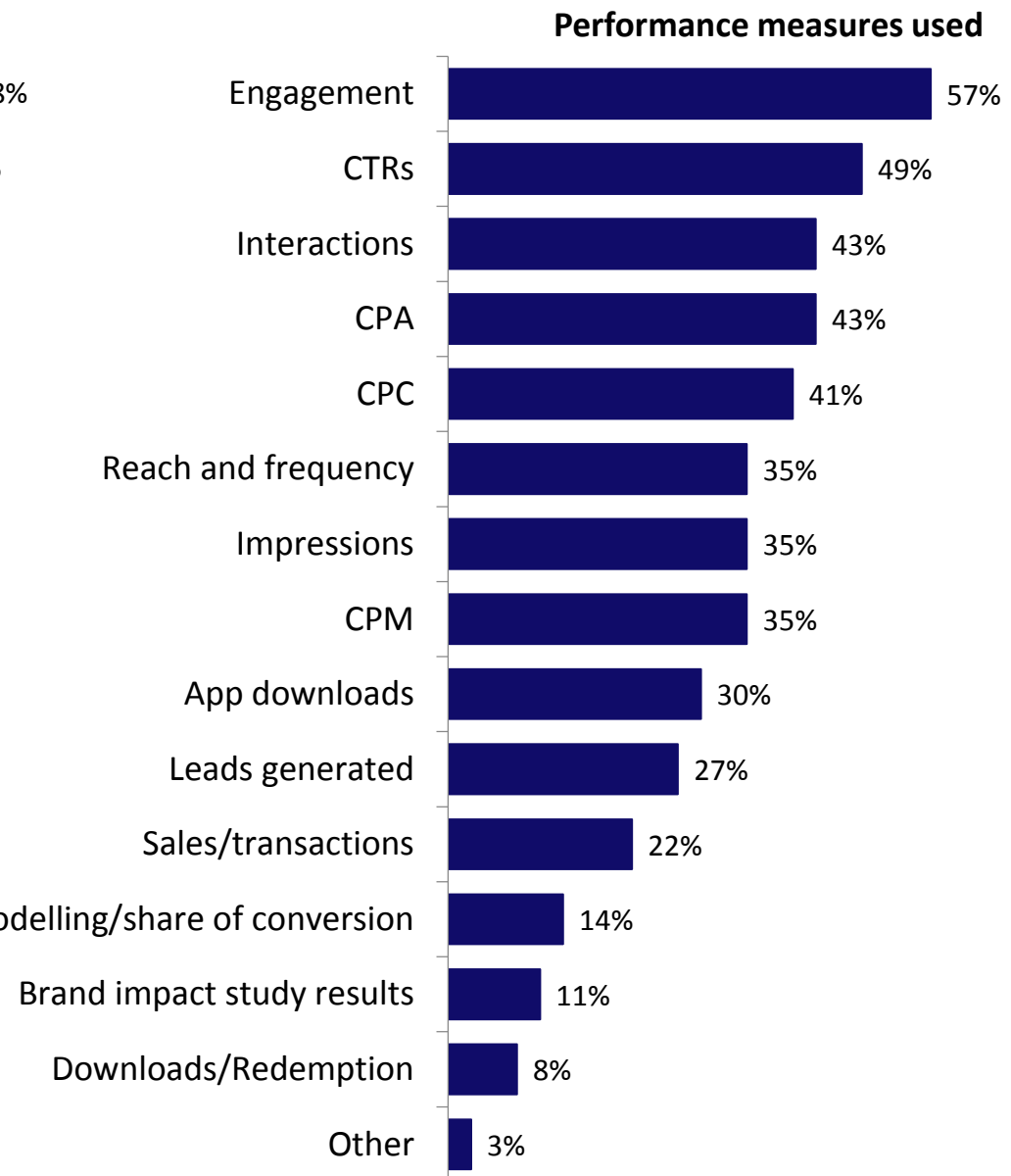
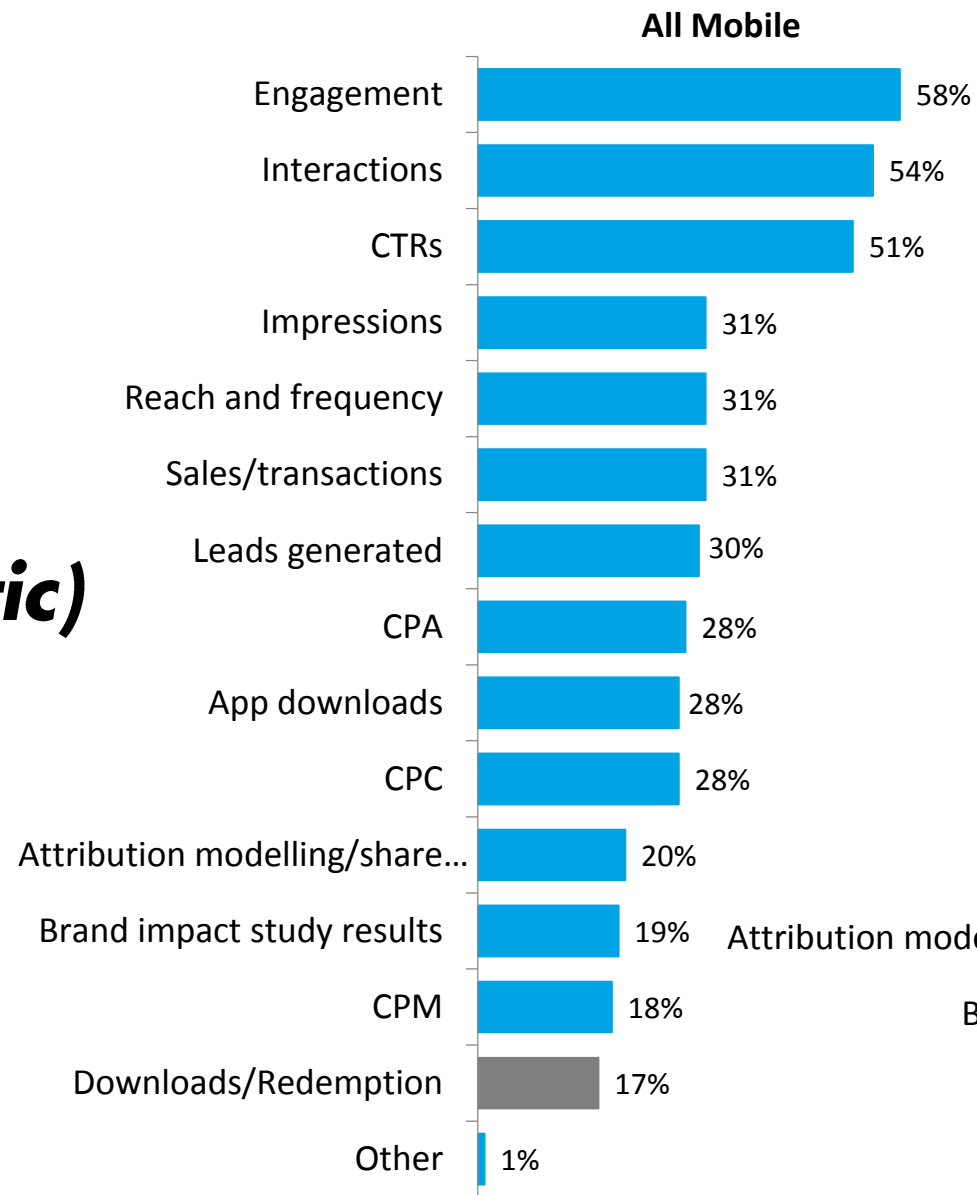


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Key Measures Across Mobile Buying: (general vs programmatic)

Engagement was the key measure when accessing programmatic followed by CTR's. This was similar to 2014.



Which of the following did you use as key measures to assess performance against the objectives when you use programmatic buying when purchasing mobile ad placements?



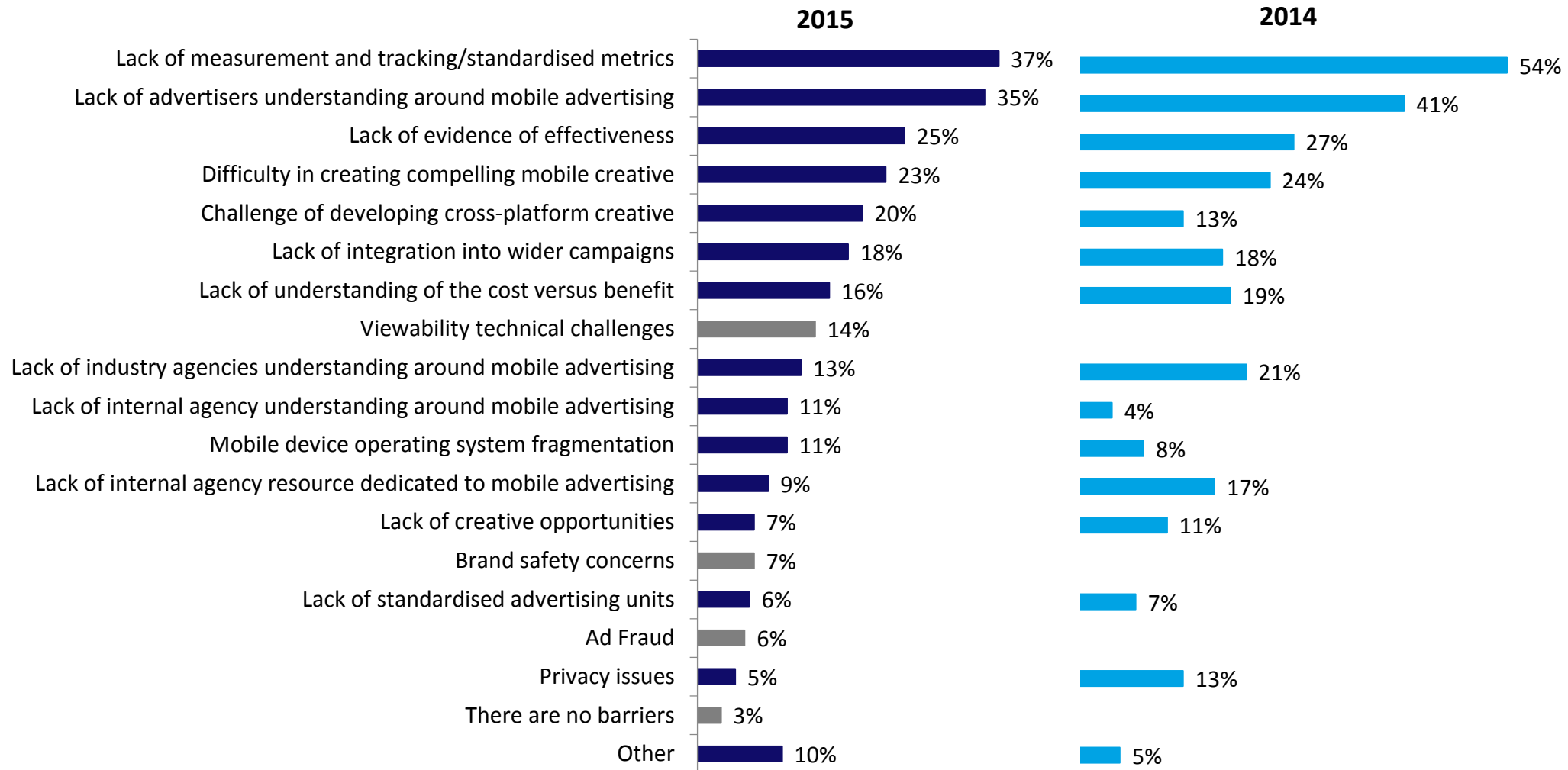
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Mobile Advertising Issues & Values

Issues of Using Mobile Advertising



Measurement & advertisers understanding of the medium were the biggest issues facing the industry in 2015.



What are the three biggest issues stopping mobile from being a larger proportion of digital ad volume?

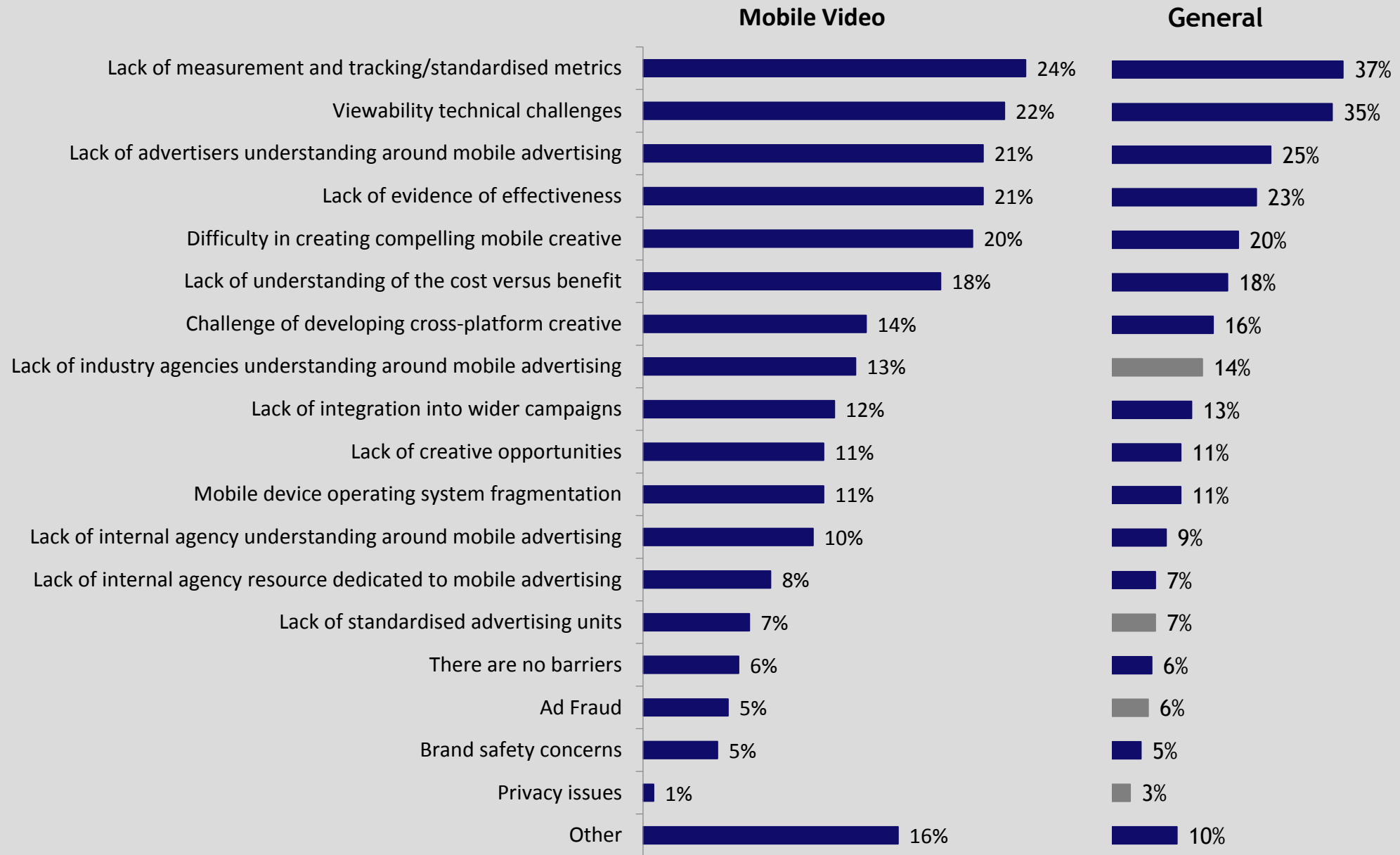


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Issues of Using Mobile Video vs. Video

Measurement and understanding was also the top issue for mobile video, however viewability and tech issues were seen at the same level. There was also more evidence needed around effectiveness.



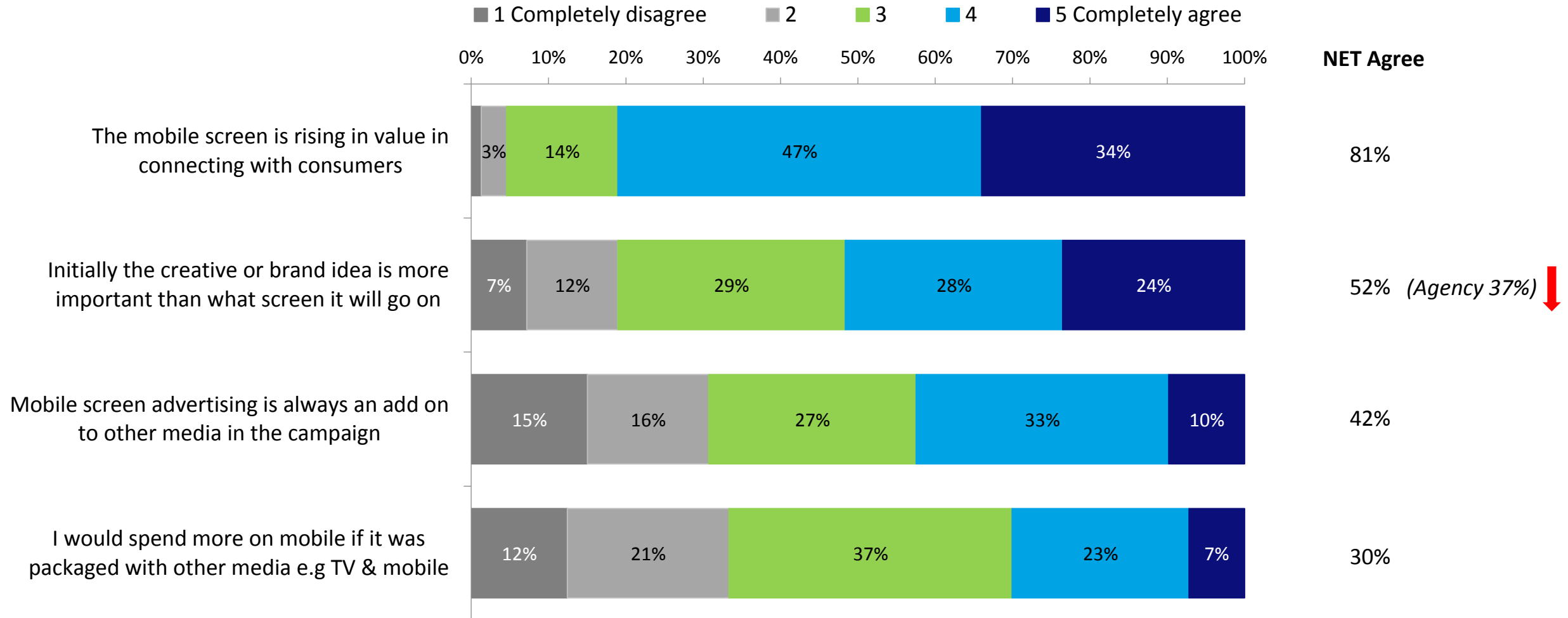
And what are the three biggest issues stopping mobile video from being a larger proportion of digital mobile ad volume?



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Statement about Mobile Screen Advertising



8 out of 10 people agree that the mobile screen is rising in importance.



Please indicate the extent to which you agree with each of the following statements, using the scale where 1 means "completely disagree" and 5 means "completely agree".



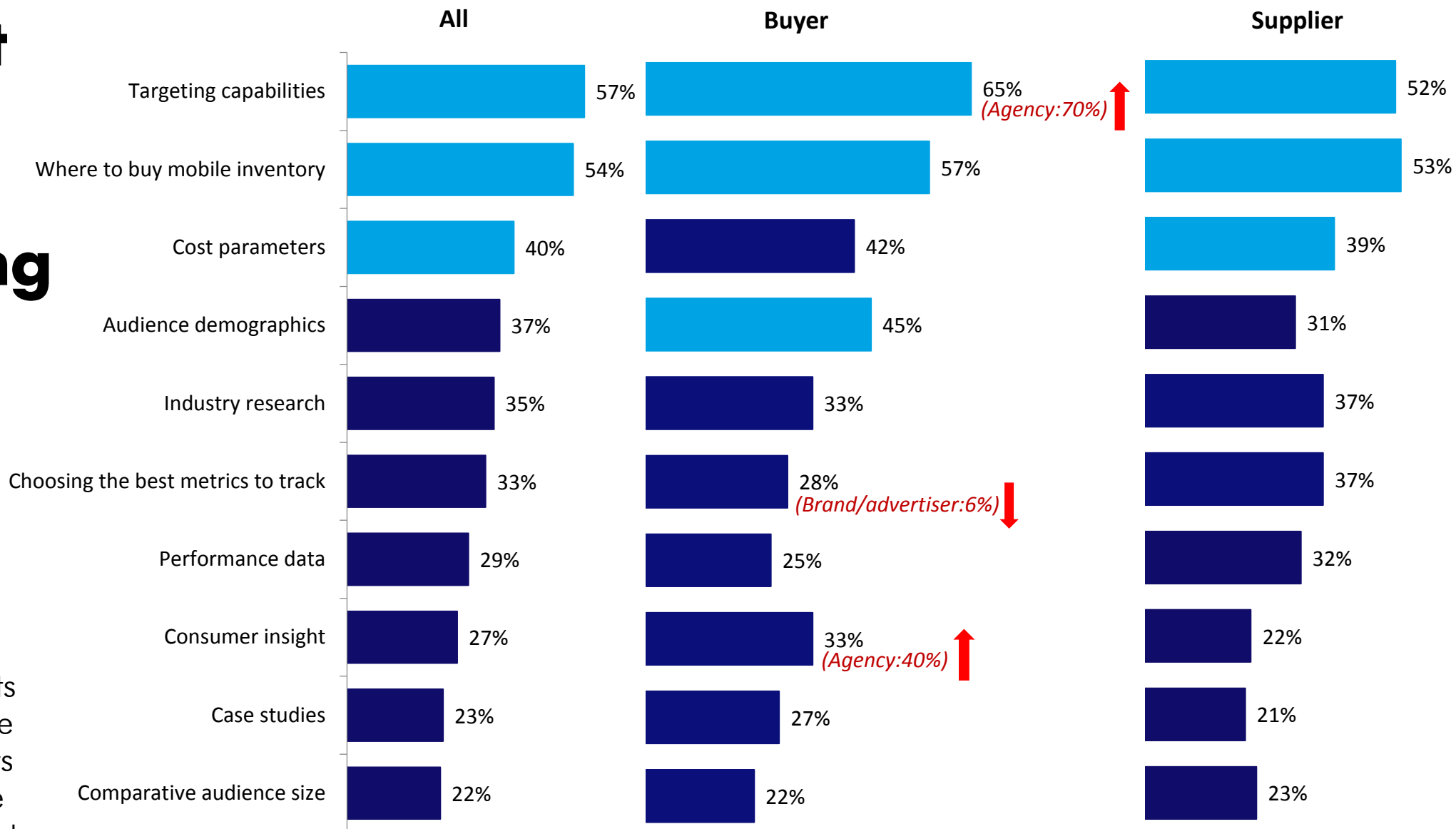
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Statement about Mobile Advertising

“For specific campaigns, I feel I have sufficient information about...”

Audience size, insights and case studies were the areas respondents thought they had the least information about.



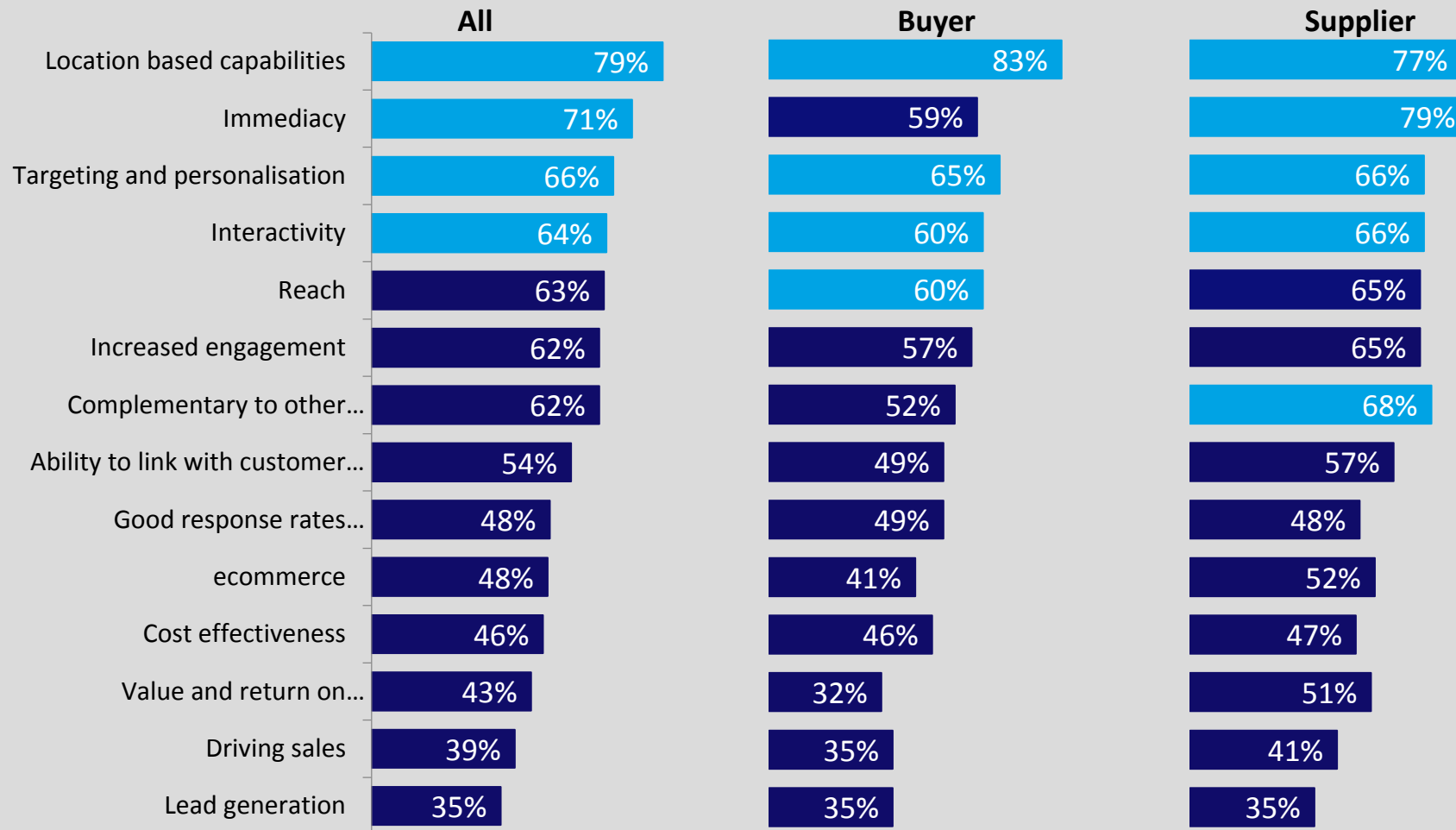
Please indicate the extent to which you agree with each of the following statements, using the scale where 1 means “completely disagree” and 5 means “completely agree”.



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Compelling Characteristics of Mobile Advertising



Location and Immediacy are the biggest benefits of mobiles. Buyers & supplies list were a little different to this question.



How compelling do you find the following characteristics of mobile advertising as benefits of the medium?

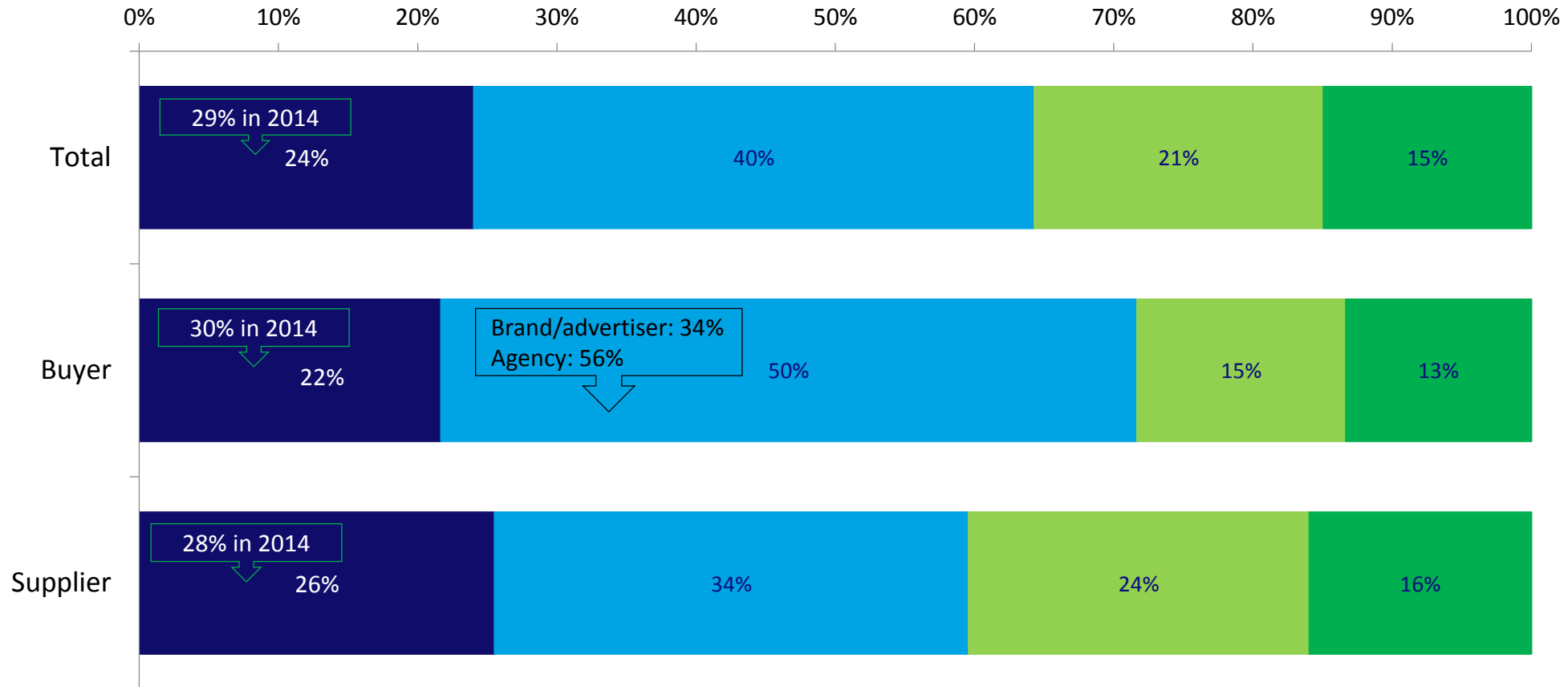


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Importance of Multi-Screen Advertising

■ It generally core to our strategy
 ■ It is very important
 ■ It is somewhat important
 ■ It is not important



Multi screen advertising was seen as important but had dropped a little since 2014.



How important is multi-screen advertising (e.g., TV + digital screens, etc.) in the campaigns and strategies you're involved with?



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Executive Summary

- The market is expecting a 26% increase in mobile spend over the next 12 months.
- 41% see mobile as a significant part of their marketing & expect to use in half of their campaigns.
- 93% of the 'buyer' side satisfied with their mobile results.
- Programmatic buying increasing - 66% used with a further 23% expecting to use (next 12 mths).
- Buyers are expecting to use mobile video in 43% of their mobile campaigns (next 12 mths).
- Barriers to mobile spend remain similar to last year – measurement, client understanding, effectiveness 'proof' and the creative limitations are highest. Viewability a concern for mobile video buyers.

**Results can be
downloaded at**

www.iabaaustralia.com.au/mobile-centre/research



MOBILE TRENDS PANEL

Moderated by:

Jonas Jaanimagi

Head of Media Strategy and Operations

REA Group

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MOBILE TRENDS PANEL



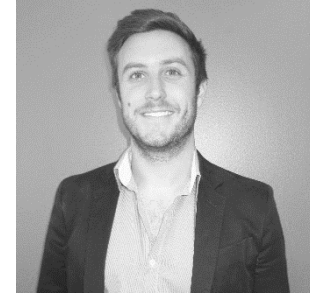
Jonas Jaanimagi
Head of Media
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Operations
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Venessa Hunt
Mobile Strategy
and Advertising
Manager
Yahoo!7



Ben Sharp
Managing
Director Australia
and New Zealand
AdRoll



Rob Hall
Partner and
Managing
Director - APAC
Big Mobile



Ben Campbell
Director of
Specialist
Sales
Mi9




MOBILE CREATIVITY

Mike Zeederberg
Managing Director
Zuni

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Mobile Creativity



5 key trends in mobile

- creativity, brought to life by Creative Showcase winners in the last 9 months

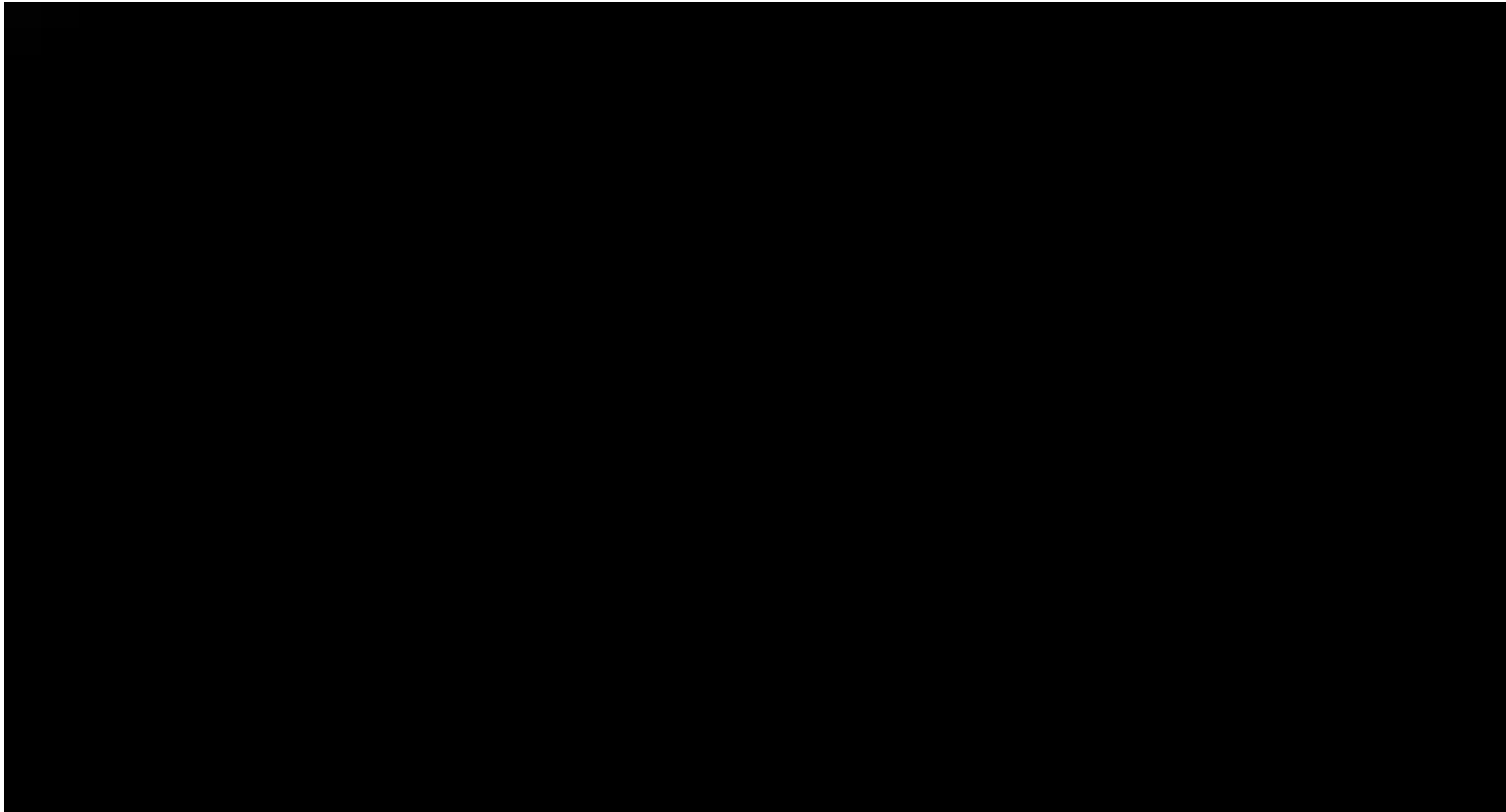
Utility



Dec– Jan 2015 Winner

<http://awards-yates.webpromos.com.au/>
<https://www.youtube.com/watch?v=JrwGZgbpLbM>

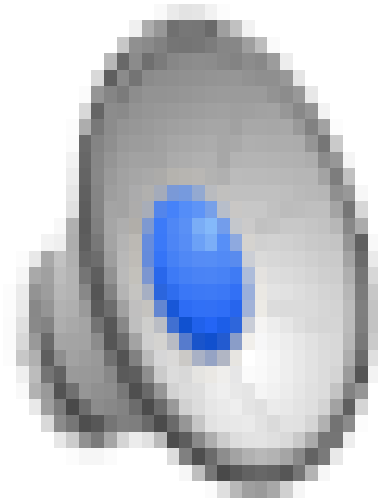
New platforms = new creative options



Apr – May 2014 Winner

<https://www.youtube.com/watch?v=cEysJ9SaDmM>

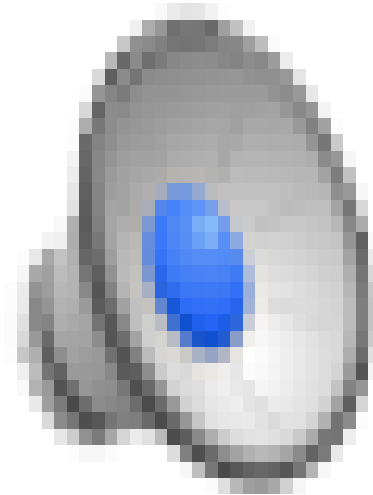
New platforms = new creative options



Aug– Sep 2014 Runner up

<http://www.awardentries.org/custom/every6seconds/index.html>

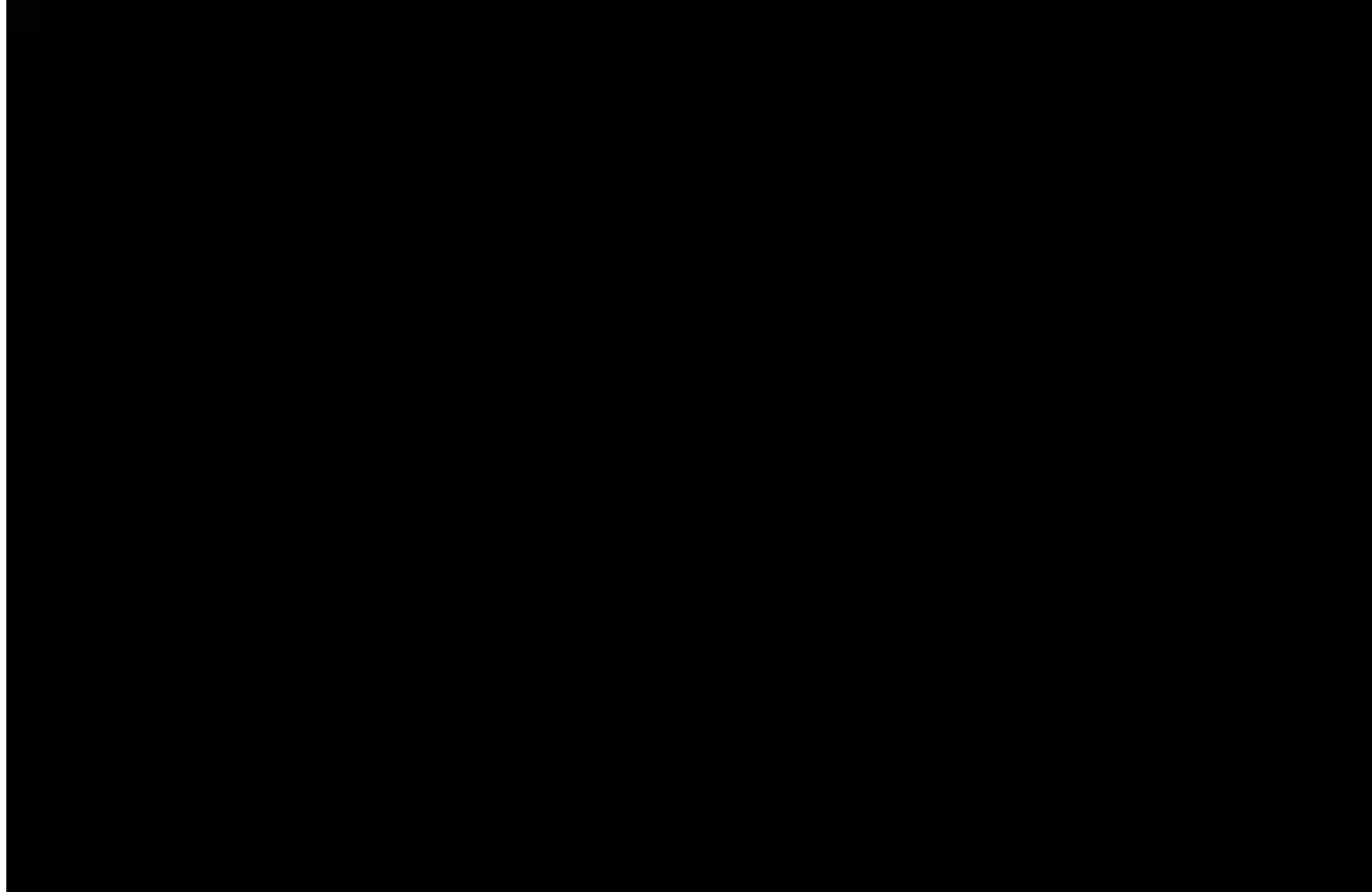
Revenue / Margin creation



Oct– Nov 2014 Winner

<http://www.ourawardswork.com/rip-curl-awards/>

Showcasing tech provides creative opportunity



Feb– Mar 2015 Winner

Reach



Dec– Jan 2014 Runner up

[u.be](#)

**Thank you for
attending!**