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MEASURE

FACT SHEET PACK

10.10.2017

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MISSION

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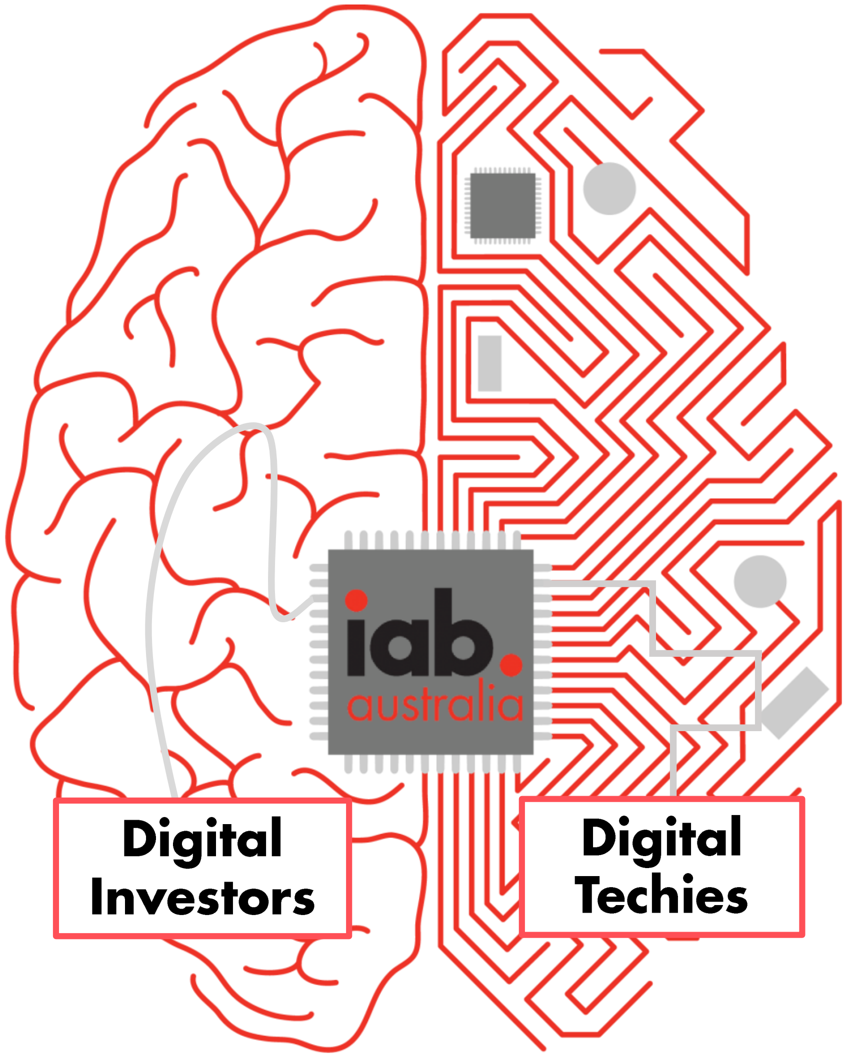

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STRATEGIC INITIATIVES

Making Measurement Make Sense

Building a Trustworthy Digital Value Chain

Building Brands Online

Growing Mobile Value

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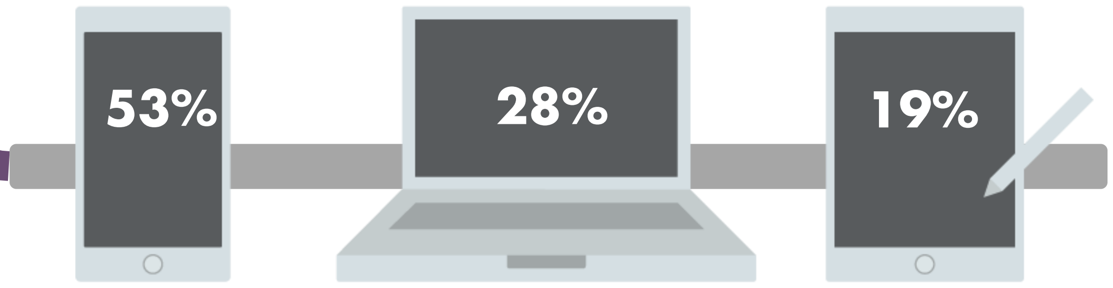
DIGITAL AUDIENCE

Time Online Per Month

Age	Time
18-24	88hr 28min
25-34	93hr 57min
35-44	94hr 56min
45-54	101hr 00min
55+	71hr 01min

Device Share of Time



20.2m Australians online each month
19.0m Australian online each day

14.6m Australians online on their mobile daily

85% Australians have a smartphone

Sources: Nielsen Digital Ratings Monthly Aug 17; Digital Content Ratings Aug 17

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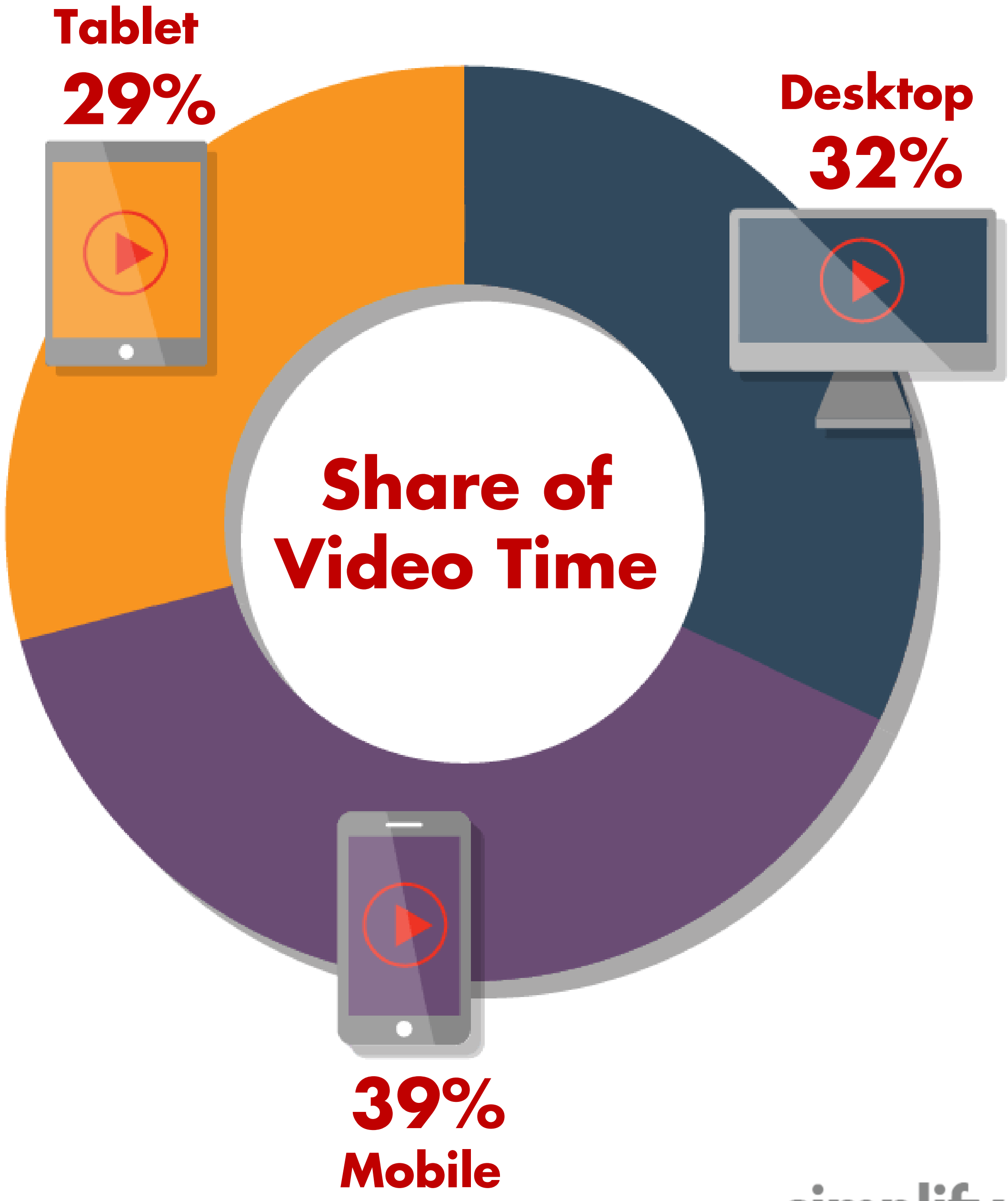
DIGITAL VIDEO MONTHLY UNIVERSE – 18+

Monthly video audience

81% of Australians aged 18+ (15.4m) are viewing 27 hr 31 mins per month on average.

Time Per Month Per Person (hr:min:sec)	
18-24	34:56:56
25-34	34:34:00
35-44	31:08:02
45-54	24:53:46
55-64	24:59:54
65+	9:27:25



Source: Nielsen Digital Content Ratings July 2017

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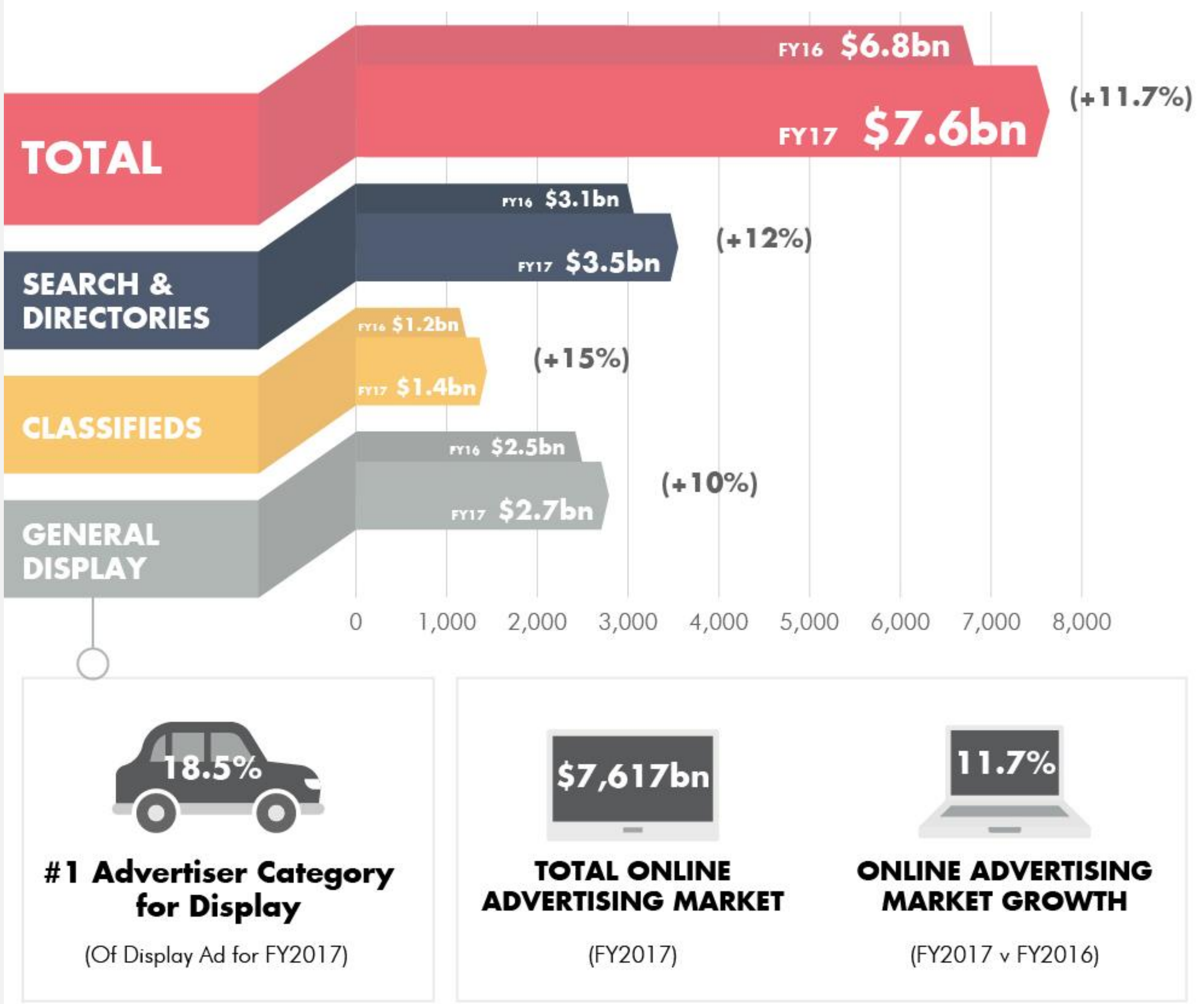
FY2017 ONLINE ADVERTISING EXPENDITURE REPORT

1. $2.6bn spent on **mobile** advertising in FY2017, up 33% year on year.
2. **Mobile** display advertising represented 55% of the display market
3. $894m spent on **video** advertising in Q1, up 49% year on year
4. **Video** advertising represented 33% of the display market.
5. **FMCG** followed by **automotive** are the two largest advertiser categories for video advertising



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AD REVENUE H1 2017 (Jan-Jun)

$7.6B Digital Ad Market

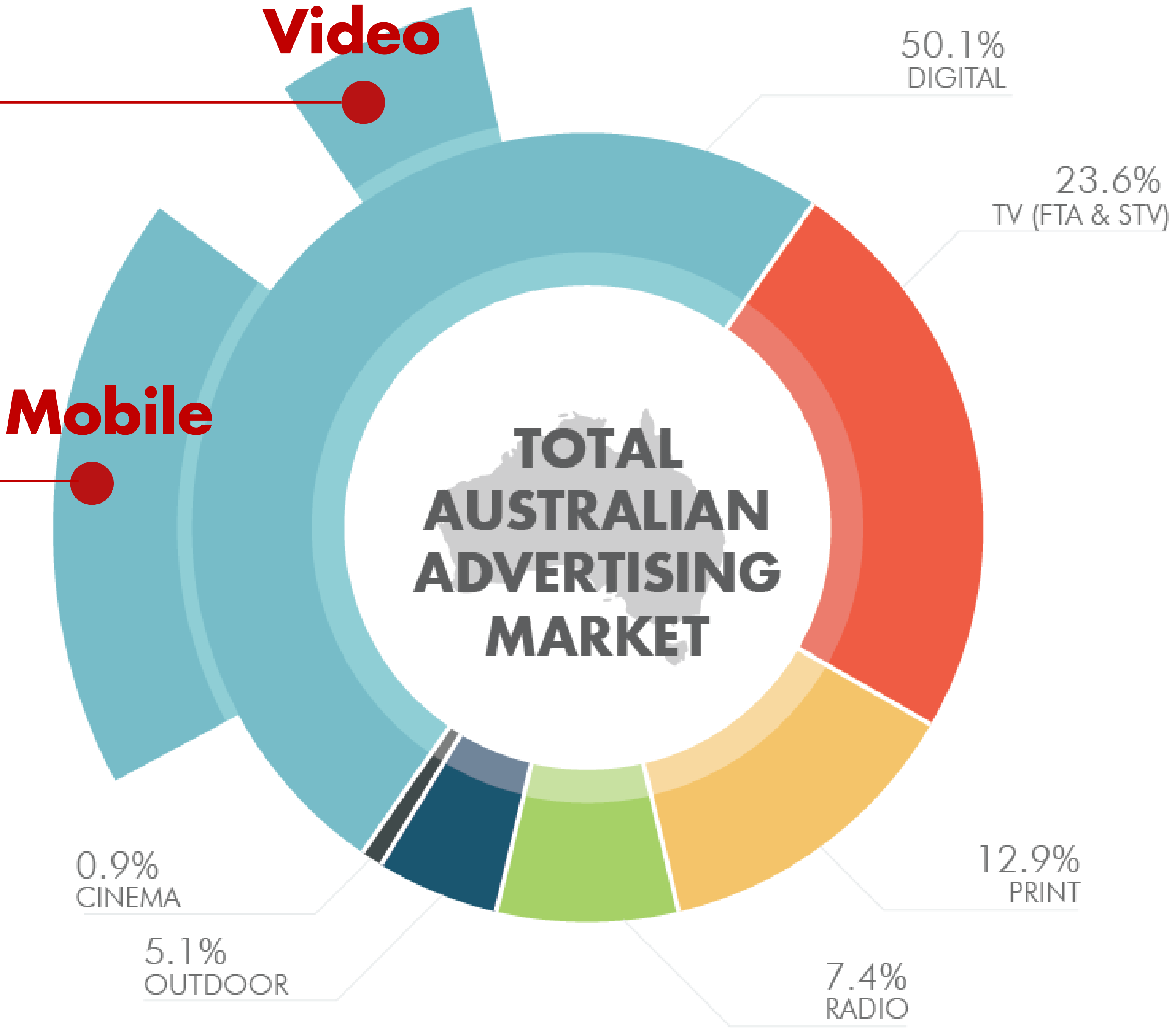
H1 2017 – 50.1% of Total Paid Ad Market

Video

Fastest Growing –now 6% of total ad market – up 49% FY17 v FY16

Mobile

Now 18% of total ad market – up 33% FY17 v F16



Source: IAB Australia/PwC Online Ad Expenditure Report; CEASA

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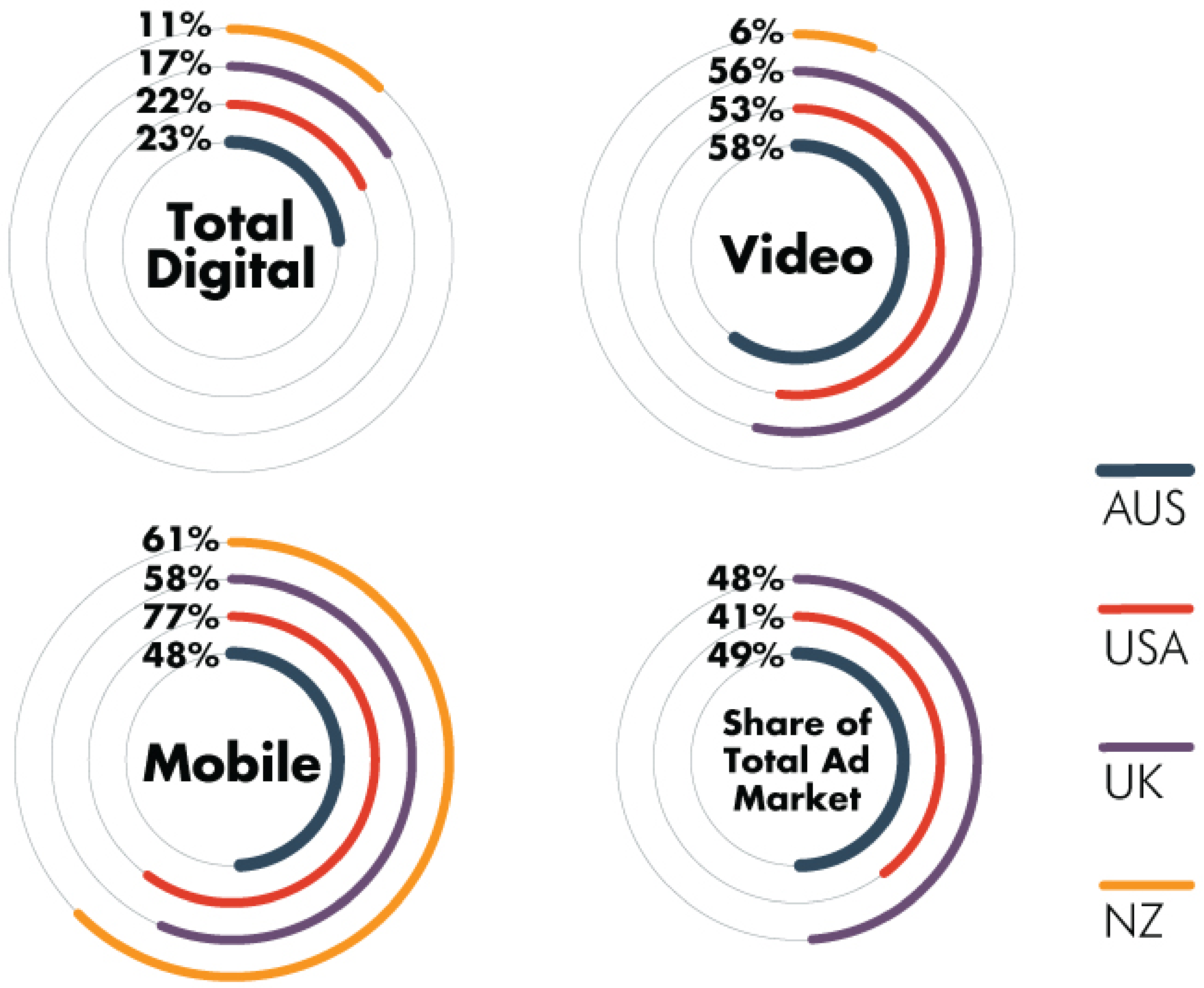
Digital Ad Revenue International Growth Comparisons

(Full Year Growth from CY 15 to CY 16)



Top 3 Advertiser Categories

CY16

	AU	US	NZ
1	Automotive	Retail	Real Estate
2	Real Estate	Finance	Food
3	Retail	Automotive	Retail

Sources: IAB Australia; IAB US, IAB UK and IAB NZ

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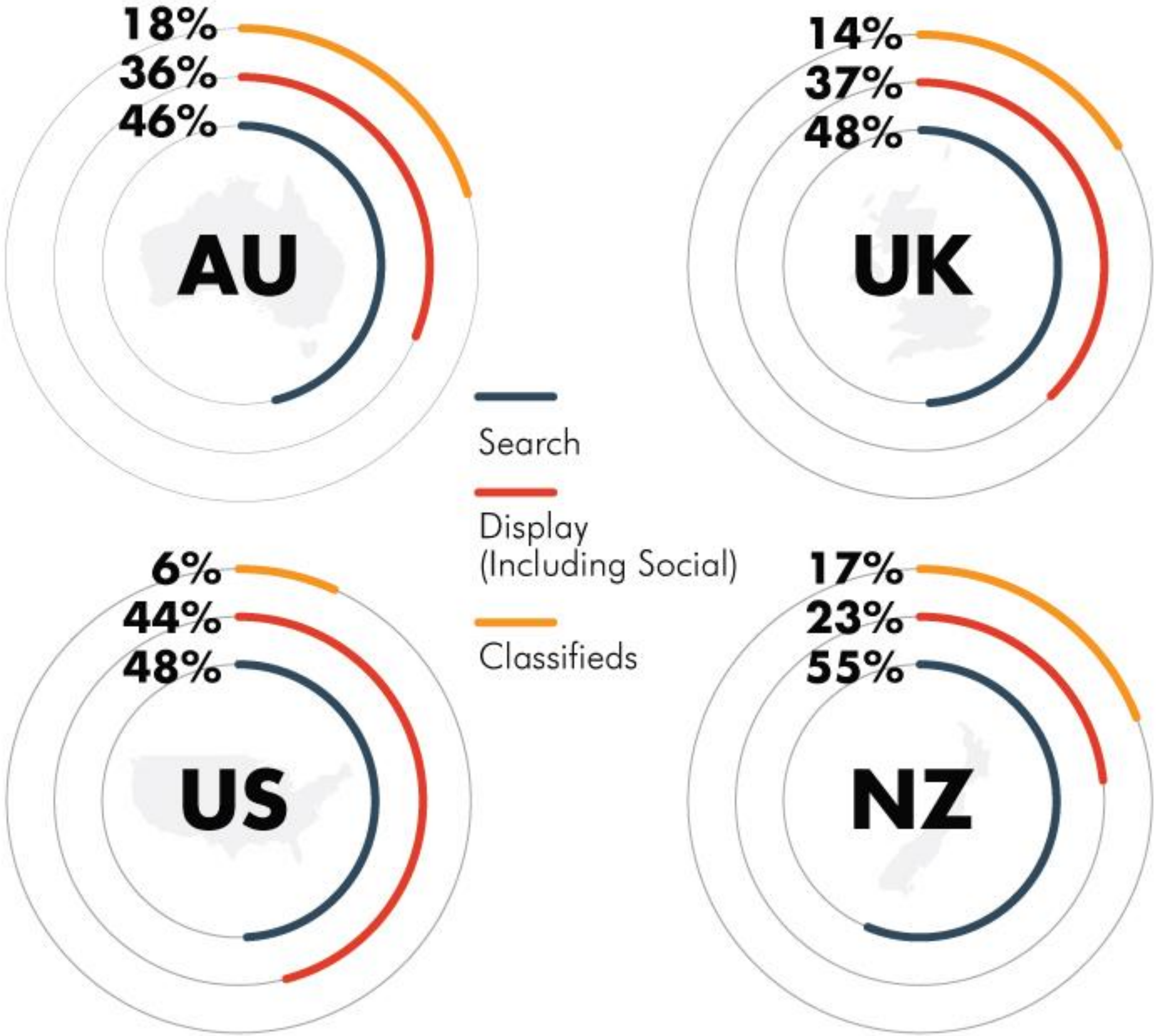
DISTRIBUTION OF DIGITAL MONEY CY16

1. Stronger market share for classifieds in both AU and NZ supported by successful local classified offerings
2. Search is the largest sector of the digital ad market in all key regions
3. Display market share has increased in most markets over the last 2 years due to growth in video and mobile display formats
4. NZ categorisation differs slightly from other markets with mobile sitting outside the three key revenue types, representing 5% share in 2016.



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BRAND SAFETY

1. Brand Safety applies to ALL media channels
2. Brand Safety means different things to different brands and categories
3. Publisher content is more varied than ever
4. Marketers need to step up, digital techies need to simplify
5. Actual Australian data on brand safety is critical
6. Keep sight of the consumer

INVALID TRAFFIC/AD FRAUD

96.2% of Australian inventory was valid human traffic

Valid human traffic by platform

98.7% 97.6% 98.6%

Mobile Desktop Video

Source: IAB Australia/PwC IVT Benchmarks Jul 2017

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VIEWABILITY PRINCIPLES

1. The IAB viewability standard is the MRC standard
2. The IAB is committed to driving viewability
3. Non-viewable and non-measurable does not equal fraud
4. Independent measurement is an absolute necessity to measure viewability
5. The IAB will work with the vendors to publish viewability benchmarks every 6 months
6. The IAB encourages publishers, agencies & clients to work together to drive continuous improvement
7. IAB recognizes the importance of viewability but notes other variables drive business returns

VIEWABILITY

IAB Minimum recommended standard display
50% of creative for 1sec

IAB Minimum recommended standard video
50% of creative for 2sec

Mobile AU benchmark
54% of inventory meets MRC Standards

Desktop AU benchmark
55% of inventory meets MRC Standards

Source: IAB Australia/PwC Viewability Benchmarks Nov 2016

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AD BLOCKING

Modification Recommendations

1. Assure users of site safety: Provide guarantees that site and ads are secure, malware- and virus-free, and won't slow down browsing.
2. Focus on ads that limit interruption of content flow and do not take an excessive amount of time to load.
3. Polite messaging to turn off their ad blocker or whitelist a site in exchange for viewing content.
4. Some sites may choose to limit content availability for users of ad blockers who do not turn off their blockers. IAB Australia members have access to an Ad Block Detection Code to help provide better communication with site visitors

1 in 4 use an adblocker on at least one device

Usage stabilising in other key markets. (UK, US)

AU usage dropped from 27% to 25% in the last 6 months

Primary reason for adblocking is to avoid viruses then followed by concern re volume of ads

Low usage (5%) on mobile where majority of time is now spent

Source: IAB Australia Ad Blocking Benchmarks Wave 2 Apr 17

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