



PODCASTING MEASUREMENT & MARKET UPDATE

JULY 2018



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IAB AUSTRALIA AUDIO COUNCIL

IAB Australia Audio Council Member Organisations: ABC, ARN, CRA, Eardrum, Macquarie Media, Nova Entertainment, Omny, Rubicon, Southern Cross Austereo, Spotify, The Trade Desk, Triton and Whooshkaa.



The Council appreciates the support and input from Acast.

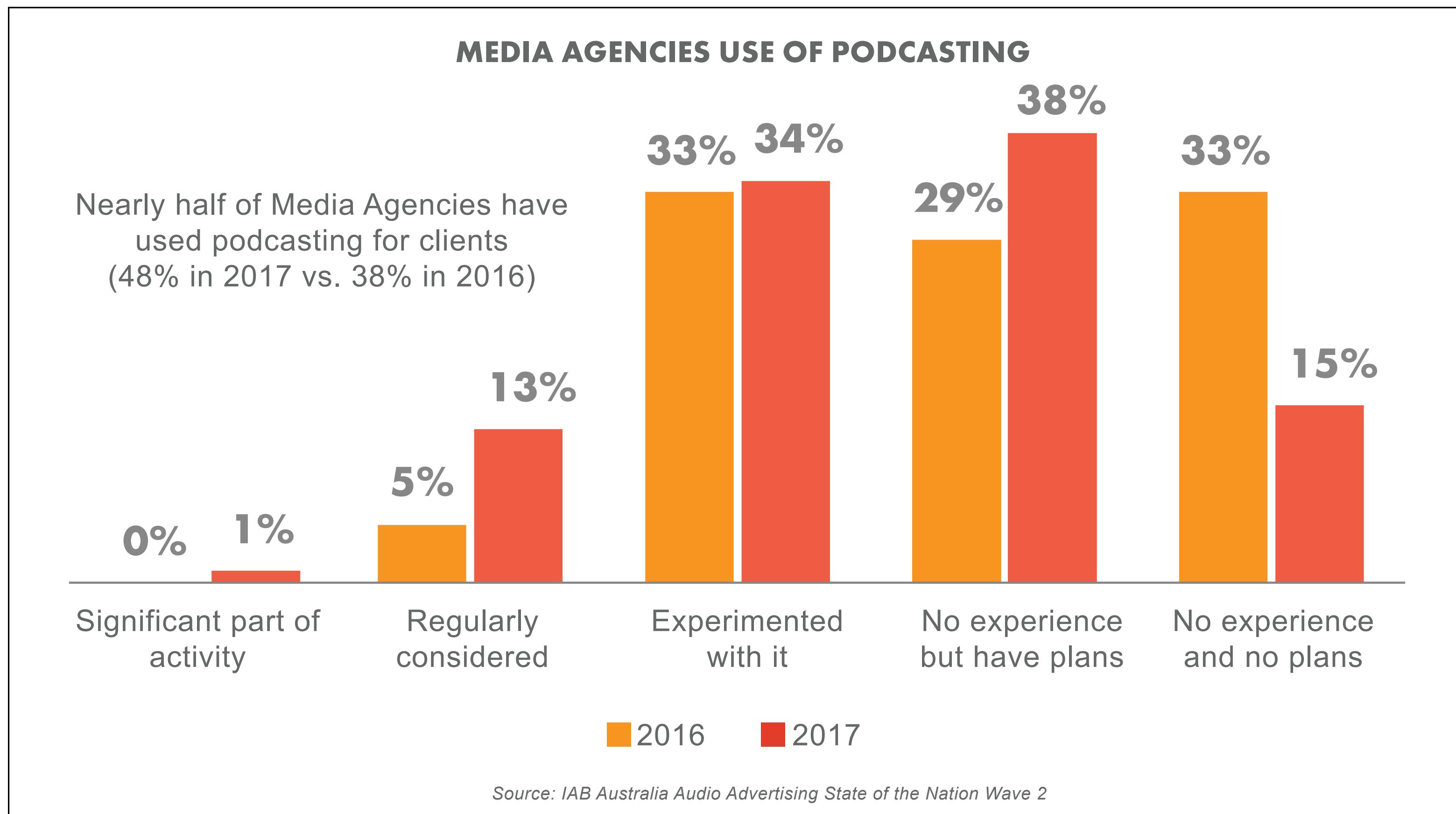


MARKET BACKGROUND

The podcasting advertising market in Australia has grown significantly since the IAB Australia Audio Council endorsed the first [US IAB podcasting technical measurement guidelines](#) in 2016. Nearly half of media agencies indicating that they have used podcasting for clients in the 2017 [IAB Australia Audio Advertising State of the Nation study](#). This document offers both an Australian market update as well as guidance on measuring both content and ads in podcasting environments. Much of the measurement information builds on the work developed by the US IAB Tech Labs Podcast Technical Working Group.

The commercial interest in podcasting is underpinned by increased Australian consumption of podcasts. The recent Edison Research [Infinite Dial](#) found that twenty two percent of 12-54 year old Australians listen to podcasts monthly, consuming an average five podcasts each week. Nearly 8 in 10 (79%) Australian podcast listeners use their phone as their primary listening device.

Although we do not currently have robust figures on the advertising revenues generated



MARKET BACKGROUND

by podcasting in Australia, in the latest [IAB US Podcast Advertising Revenue Study](#) showed that podcast ad revenues were \$314m in 2017, up 86% on 2016. Also of note, of the 14 podcast content genres measured, the top four generated more than half of the advertising revenue in 2017 - arts/entertainment (17%), technology (15%), news/politics/current events (13%) & business (11%).

As the podcasting market grows, brands are investing in podcast advertising, partnerships and content creation, driving the ongoing evolution of metrics to aid education and analysis of campaign success. The range and distribution of players being used for consumption will change over time and by market which also needs to be taken into consideration when tracking consumption.

CREATIVE FORMATS FOR 2018

Podcast - Bespoke branded podcasts

10%

60%

Podcast - Pre/Post-roll credits

19%

50%

Podcast - Native/Live read

13%

62%



Have used and will continue



Intend to use in next 12 months

Source: IAB Australia Audio Advertising State of the Nation Wave 2

PRIMARY OBJECTIVES FOR AGENCIES USING PODCASTING

Increase brand awareness

51%

Increase engagement

27%

Support for specific promotions

13%

Other

9%

Source: IAB Australia Audio Advertising State of the Nation Wave 2

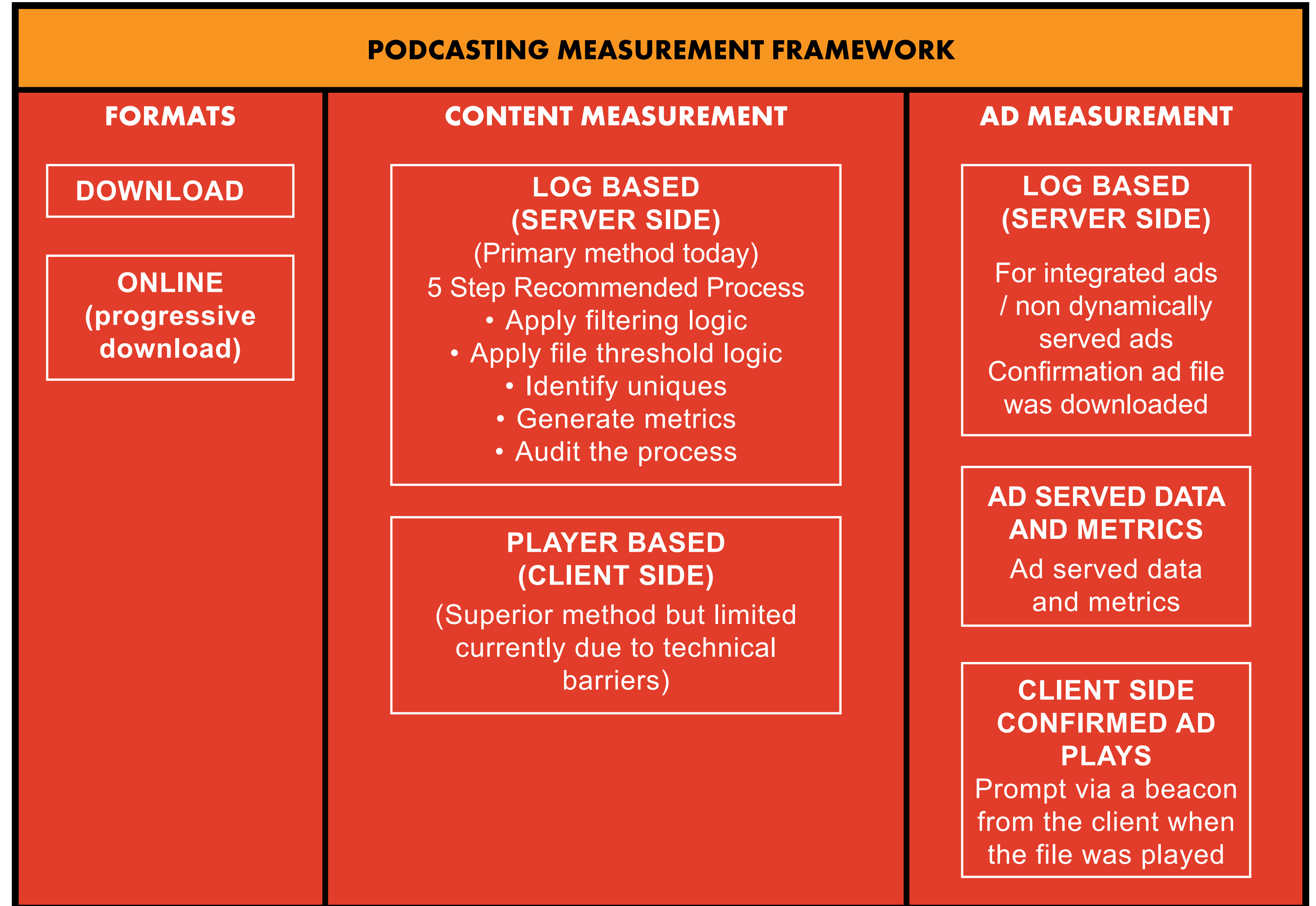
PODCASTING MEASUREMENT UPDATE

Although there has been discussion in market about the difficulties in measuring podcasts there is rich data available. The ability to track census data for listens and improved filtering techniques goes beyond the scope of many other media offerings.

The second version of the [IAB Podcasting Technical Measurement Guidelines](#) were finalised in the US in late 2017. In this document the US Podcast Technical Working Group's aims to provide clarity in the market-place by developing a common language around measurement. The focus of the document is on server side measurement (but will be extended to client side measurement once the client side opens up).

In addition to defining standard metrics for both podcast content and podcast ads, this document provides guidance on some of the technical details such as request filtering, in order to reduce the discrepancies currently seen across podcast publishers and tech vendors. Terminology and definitions for podcasting can also be found within the [IAB Australia Digital Audio Glossary of Terms](#).

The IAB Australia Audio Council have reviewed these guidelines and applauds the work carried out by the Podcast Technical Work Group. While supporting this document there are a number of points the Council would like to highlight to the local Australian market.



AUSTRALIAN IAB AUDIO COUNCIL NOTES ON V2 IAB PODCASTING TECHNICAL MEASUREMENT GUIDELINES

LISTENER DEFINITION

(Reference page 15 & 16 of IAB Podcast Measurement Version 2)

Podcast producers should provide clarity in reporting on method used to ascertain listener numbers. IAB Australia is supportive of the use of unique “listener” data to complement download numbers. This in turn will allow marketers to better design their ad spend with podcasts.

IAB Australia also acknowledges that the current methodology to measure unique listeners by IP and user-agent is limited in its accuracy.

Addition of downloads or unique downloads from different measurement systems must not be presented as a unique downloader or listener count. Although often there will be very little overlap the duplication factor from a people based measurement approach is unknown.

ELIMINATING PRE-LOAD REQUESTS

(Reference pages 10 & 11)

Pre-loading of podcasts directly results in podcast downloads being counted when they should not. The Guidelines recommend two solutions:

- Policy put in place to not allow pre-loading in players and on websites (e.g. preload=none for

HTML5)

- Use a download threshold based on ID3 header payload plus 1 minute of recording time to determine if request was for a play/download or for pre-loading

IAB Australia recommends use of the first solution as the more rigorous solution.

FILTERING WINDOW

IAB Australia reinforces the warning within the guidelines that a 24 hour window for IP filtering may undercount legitimate downloads as listening coming from devices sharing IP not being counted.

IAB Australia supports the recommendation to build an industry wide whitelist and will work with IAB US Podcast Technical Working Group on this project.

DOWNLOAD THRESHOLD LEVELS

(Reference page 12)

The current guidelines require 1 minute worth of playable content be downloaded to count as a valid download. IAB Australia believes as the market matures and the tracking systems improve more clarity around download time should be made available by podcast producers. As more short

form content is produced the market also look at a percentage of download metric.

EXTRA POINTS TO CONSIDER:

TIME SPENT BY LISTENER ACROSS A PODCAST SERIES

Although not a common metric currently due to technical restraints, IAB Australia, is supportive of moving towards understanding and measuring the average time spent listening to a series which will be a valuable metric for brands. A sample of this data is currently available via Apple Podcast analytics.

DATA CONSENT AND GDPR UPDATE

Use of tracking for different identifiers will come under increased scrutiny due to the introduction of GDPR. To find out more about the impact for Australian business, IAB Australia has summarised information from the [IAB Privacy Event](#) held in March 2018.

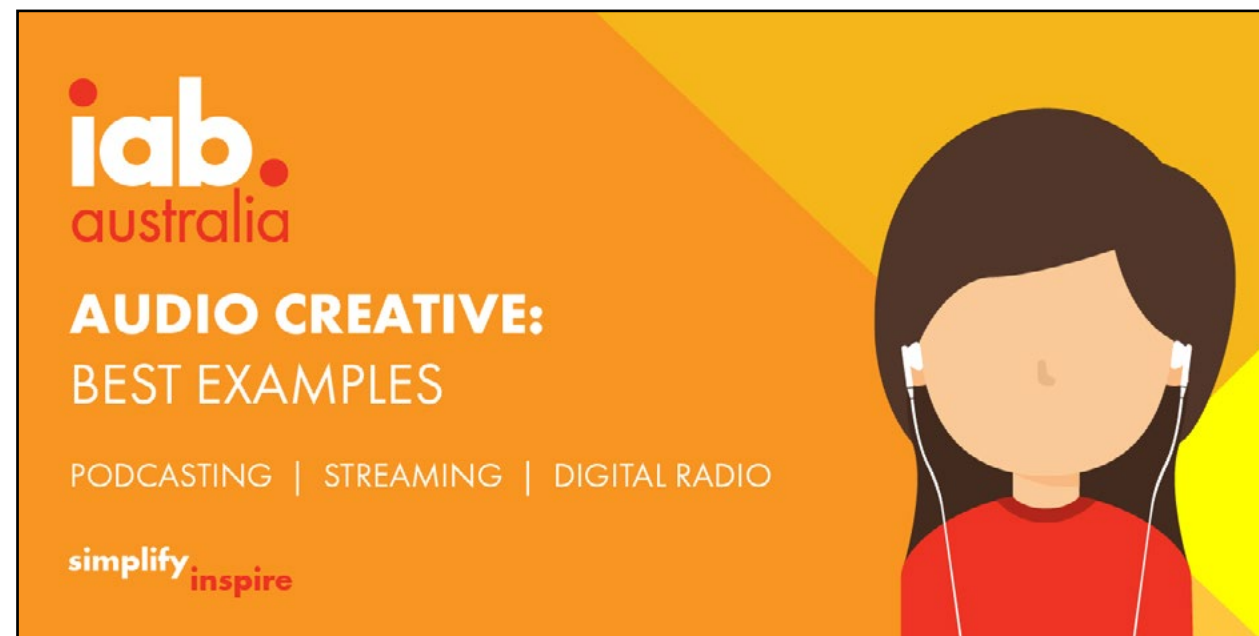
PODCASTS HOSTING

When podcast producers have their content hosted on third party platforms they should ensure they understand what data the platform will provide them as well the commercial implications for any ad placements within the podcast.

MORE RESOURCES FROM IAB AUSTRALIA

Latest Resources

[Audio Creative: Best Examples](#)



The IAB Australia Audio Council has collected examples of outstanding audio creative covering ads suited for different platforms and a wide range of different ad formats.

Stay up-to-date with IAB Australia and the work we do to simplify and inspire the digital advertising industry by following us on [LinkedIn](#), [Twitter](#) and [Facebook](#), and [subscribing to our monthly newsletter](#).

Latest Research

[Digital Audio: State of the Nation - Feb. 2018](#)



The second wave of IAB Australia’s Audio Advertising State of the Nation research has been published, providing further insight on how the media buying community is using audio advertising across all platforms.

Audio Glossary

[Digital Audio Advertising Glossaries](#)



It is essential for our industry to create common language across the different platforms. This industry wide language is a key step in the IAB mission to simplify, so we tasked our Audio Council with crafting this glossary.

