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MEASURE

01.11.2018 CONFERENCE

Digital Fact Pack



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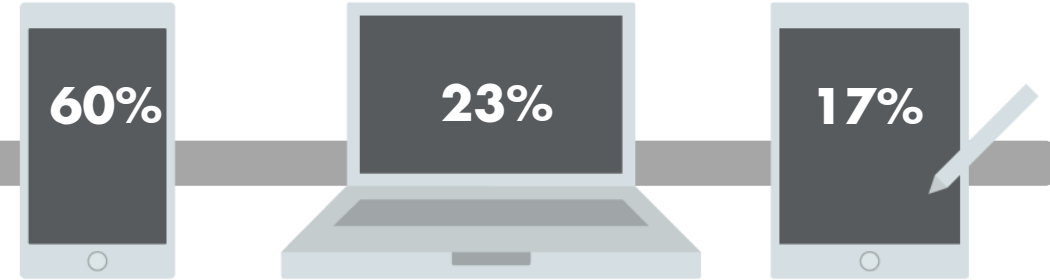
DIGITAL AUDIENCE

Time Online Per Month



Age	Time
18+	92hr 33min
18-24	91hr 22min
25-34	108hr 59min
35-44	103hr 05min
45-54	98hr 37min
55-64	82hr 58min
65+	60hr 52min

DEVICE SHARE OF TIME



20.6m Australians online in August 2018

19.5m Australians online each day

16m Australians online on their mobile daily

89% Australians have a smartphone

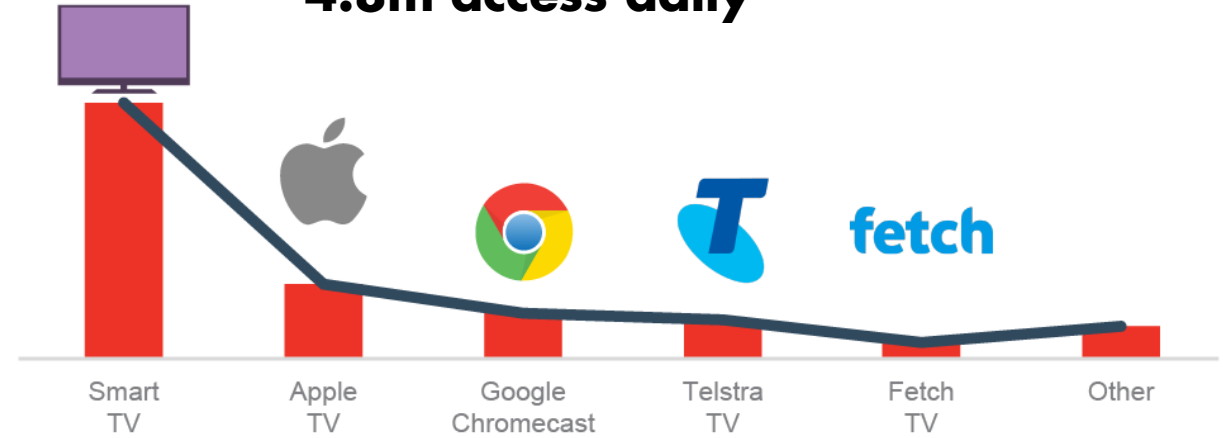
DEVICE OWNERSHIP



PEOPLE 14+	('000)	%
Smartphone ownership	18,096	89%
iOS	10,336	51%
Android	7,489	37%
Other OS	324	2%
Own more than 1 smartphone	1,794	9%
Daily use of internet on smartphone	15,958	78%

PEOPLE 14+	('000)	%
Tablet ownership	11,180	55%
iPad	7,908	39%
Android tablet	3,272	16%
Use iPad daily	4,214	21%
Use Android tablet daily	1,301	6%

7.7m Australians access internet via a TV 4.8m access daily



	Smart TV	Apple TV	Google Chromecast	Telstra TV	Fetch TV	Other
# of people	5,439,106	1,478,065	1,085,582	668,228	318,806	628,292
% of population 14+	27%	7%	5%	3%	2%	3%

Half of Connected TV viewers mostly or always watch with someone else

HOW IS THE CONTENT VIEWED?	% of CONNECTED TV VIEWERS
Always viewing alone	9%
Mostly viewing alone	12%
Viewing with another household member about half the time	27%
Mostly viewing with another household member	35%
Always viewing with another household member	16%

DIGITAL VIDEO UNIVERSE – 18+

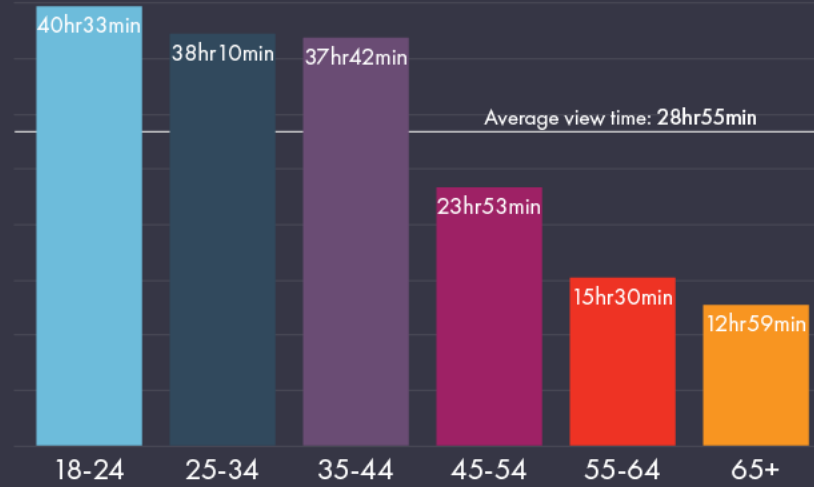
Monthly digital video audience – August 2018

84% of Australians aged 18+ (16.1m) viewed **28 hr 55 mins** on average. (desktop, smartphone & tablet only)

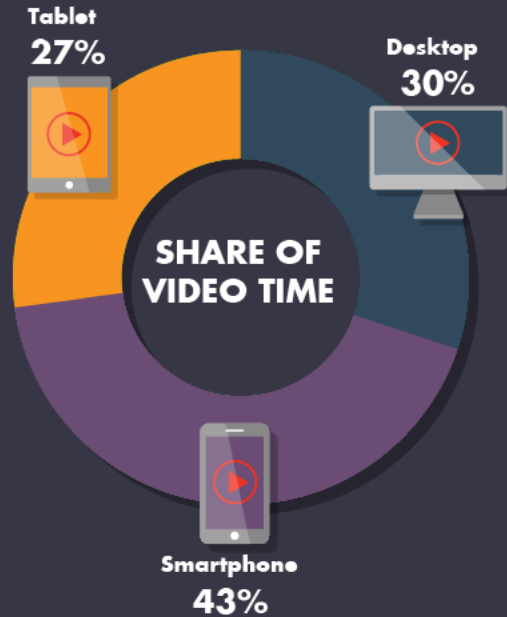
Share of all video by age – Q4 2017

Digital accounts for a **54% share** of all video for Australians aged 18-24, compared to 23% share of all video for Australians aged 50-64.

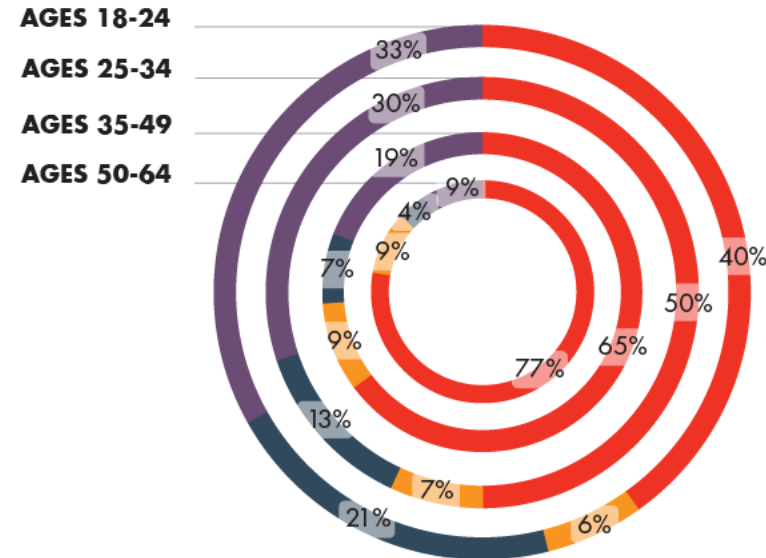
DIGITAL VIDEO TIME PER PERSON PER MONTH
AUGUST 2018



Source: Nielsen Digital Content Ratings Aug 2018



SHARE OF ALL VIDEO (DIGITAL & TV) TIME BY AGE
Q4 2017 AUSTRALIA

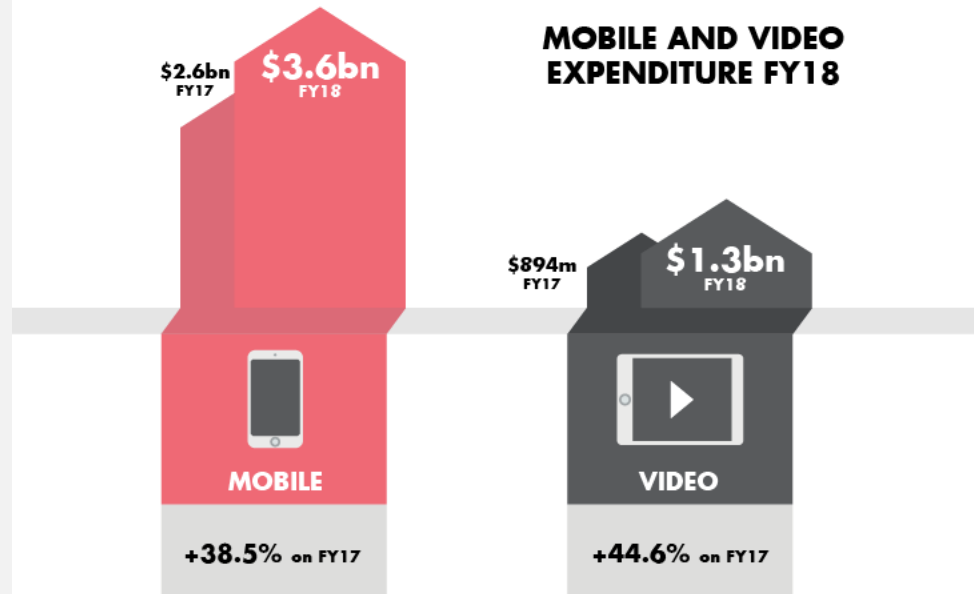
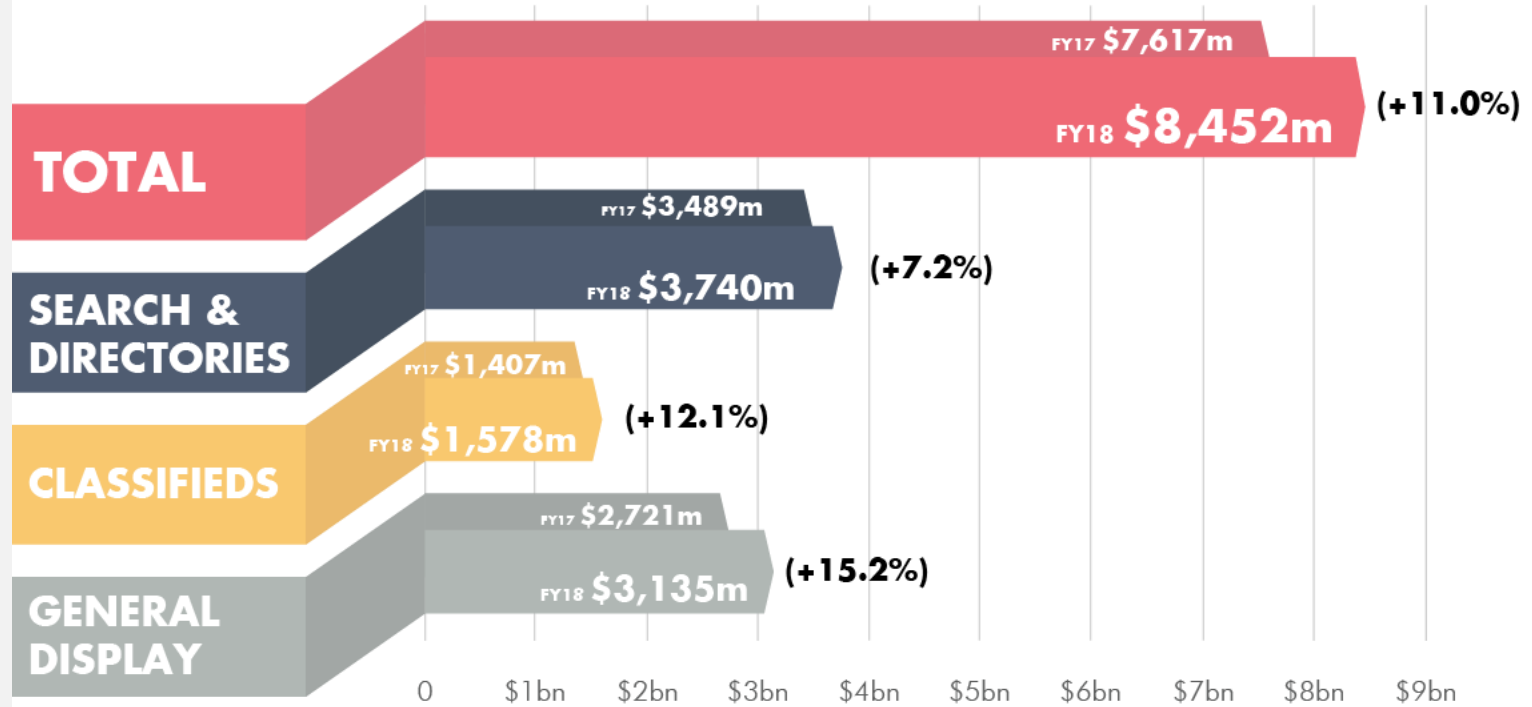


Source: OzTam Australian Video Viewing Report Quarter 4 2017

ONLINE ADVERTISING EXPENDITURE REPORT FY2018

1. \$3.6bn spent on **Mobile** advertising in FY2018, up 38.5% year on year.
2. \$1.3bn spent on **Video** advertising in FY18, up 44.6% on FY17
3. **Mobile** made up 54% of total General Display in FY18
4. **Video** advertising represented 38% of the display market.
5. **Automotive** followed by **Real Estate** are the two largest advertiser industry categories for display

Source: IAB/PwC Australia Online Ad Expenditure Report FY2018



AD REVENUE 2H FY2018

\$4.3bn Digital Ad Market

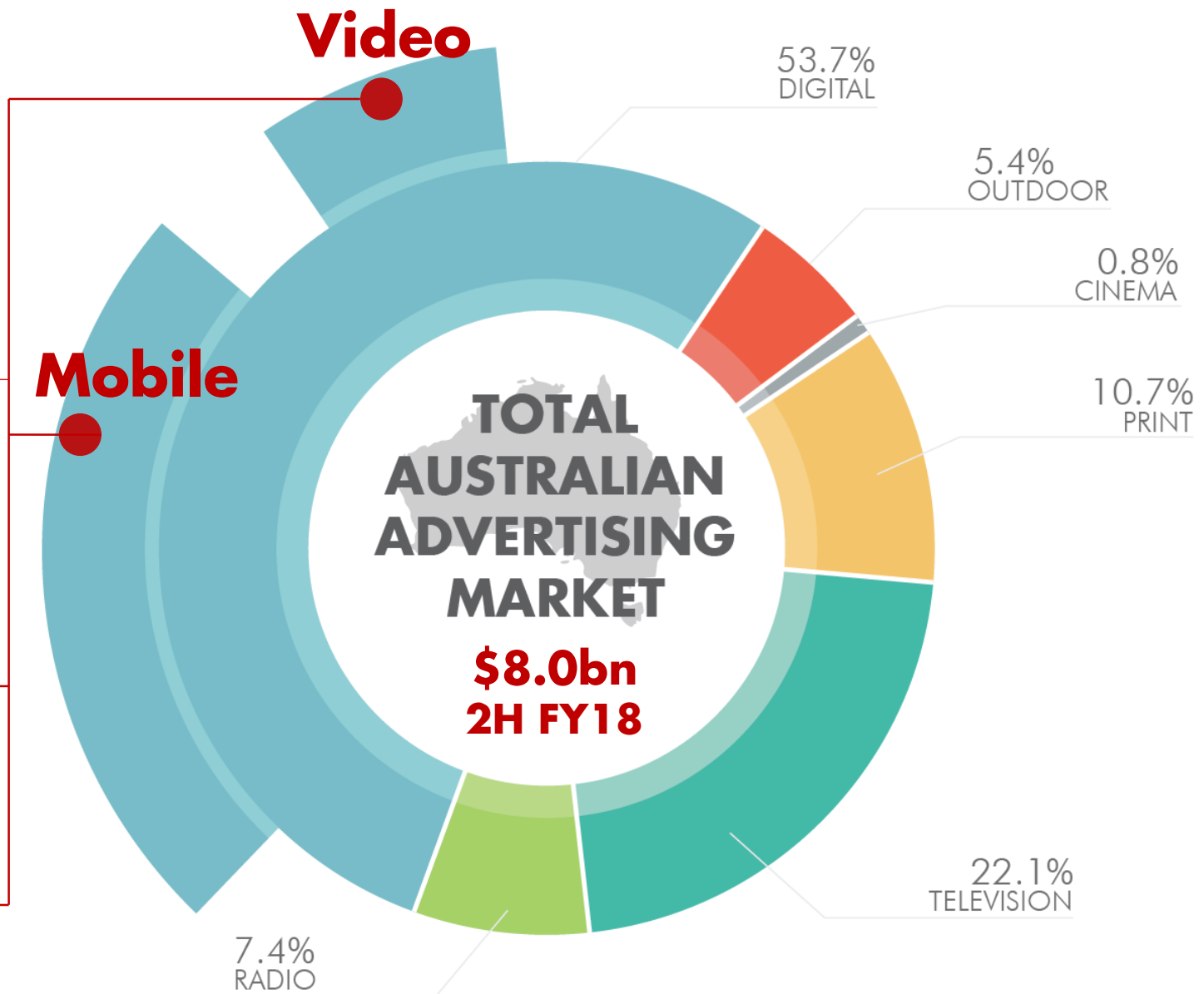
Digital represented 53.7% of Total Australian Ad Market (\$8.0bn) in 2H FY18. Total Digital Ad Spend in FY18 ended on \$8.5bn, up 11% on FY17.

Video

Fastest Growing – now 8% of total ad market – up 44% on 2H FY17

Mobile

Now 24% of total ad market – up 39% 2H FY18 v 2H FY17

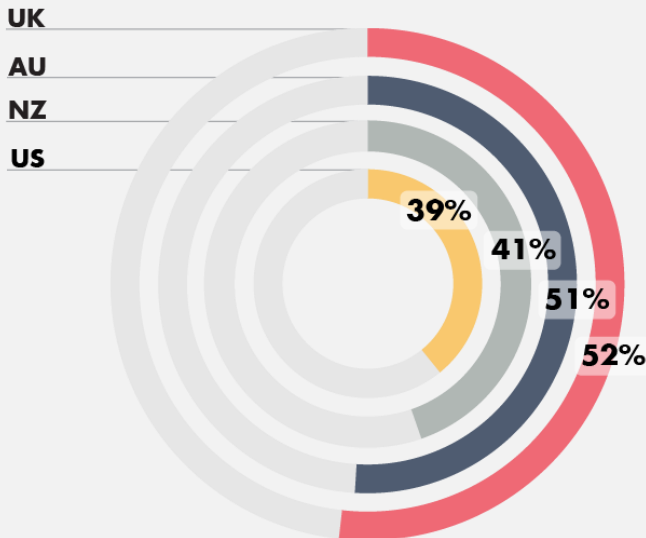


ONLINE ADVERTISING EXPENDITURE CY2017

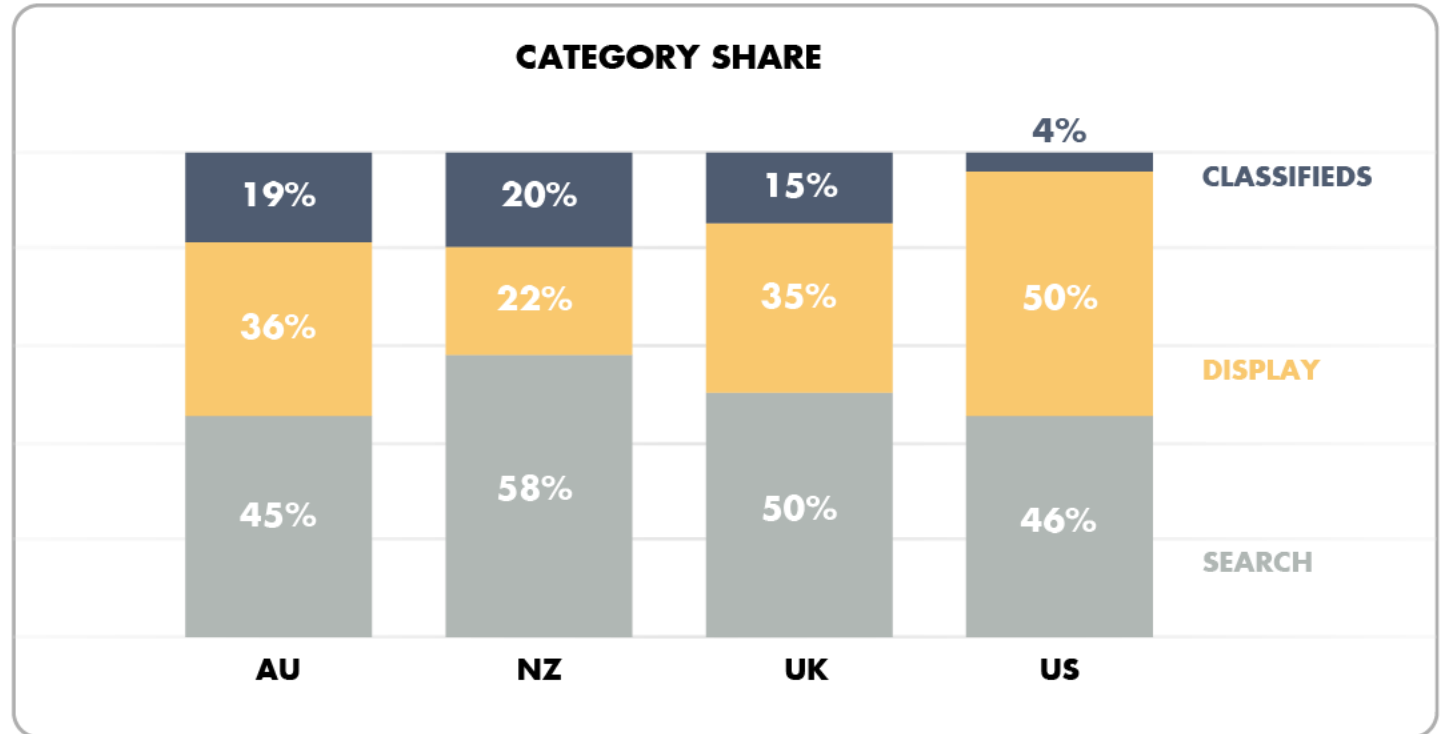
INTERNATIONAL COMPARISONS

- Australia's share of video advertising, 38%, is comparable to the United Kingdom recording 39%.
- Australia's share is higher than both United States and New Zealand at 29% and 23% respectively.

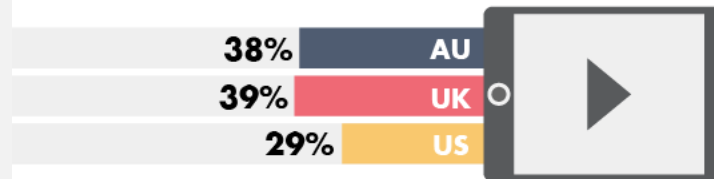
DIGITAL AS % OF TOTAL AD MARKET CY17



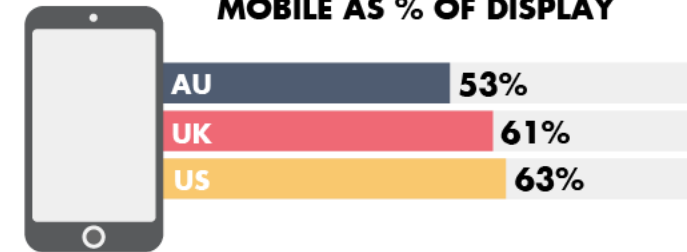
CATEGORY SHARE



VIDEO AS % OF DISPLAY



MOBILE AS % OF DISPLAY



Sources: IAB Australia/PwC; IAB US/PwC; IAB UK/PwC; IAB NZ/Staples Rodway

AUSTRALIAN DIGITAL AD PRACTICES ●●●

The Australian Digital Advertising Practices have been created specifically for advertisers in Australia to facilitate better relationships with agencies, publishers and digital platforms, and to foster shared responsibilities for digital ad spends and outcomes.

The Practices are the direct result of the AANA, IAB and MFA working to build trust and instil confidence in the digital advertising value chain.

[Download the Practices here.](#)



The following operating principles guide the approach we've taken and the content of the Australian Digital Advertising Practices.

1. CHAMPION THE CONSUMER EXPERIENCE

A better user experience will lift key quality metrics and overall campaign effectiveness.

2. EDUCATE TO INSPIRE CHANGE

Through best practice education, communication and a clear understanding of metrics, we seek to inspire change. We cannot force or mandate it.

3. SHARED OWNERSHIP AND RESPONSIBILITY

All participants in the value chain need to take responsibility for their own knowledge and understanding. Shared ownership and responsibility are imperative.

4. EVERY VALUE CHAIN IS UNIQUE

Each advertiser's needs are different. The approach to improving the value chain needs to be optimised for each advertiser's needs and partner arrangements. The advertiser must be accountable for their individual value chain.

5. FAIR VALUE FOR OUTCOMES DELIVERED.

Value is created through quality and price, therefore, adopting best practices to deliver better outcomes may cost more.

ADS.TXT INITIATIVE

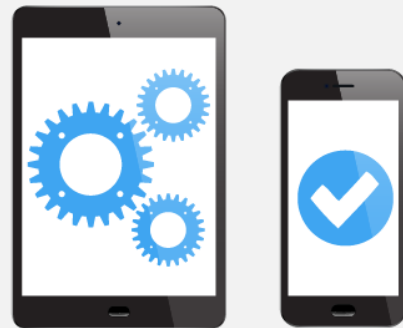
ads.txt stands for Authorised Digital Sellers and is a simple, flexible and secure method that publishers and authorised partners can use to publicly declare the companies they have sanctioned to sell their digital inventory.

How does ads.txt work?

ads.txt is a secure, text-file based mechanism for publishers and authorised partners to publicly declare the companies that they have sanctioned to sell their digital inventory.

As of August 2018, 91% of Australian domains offering display ads to programmatic buyers have implemented ads.txt.

Increasing Transparency and Trust in Programmatic Advertising



Mass adoption of ads.txt stands to benefit publishers, technology vendors, agencies and clients – helping increase trust and transparency in the digital ecosystem. Find out more about the [technical details](#), [adoption](#), and [advocacy](#) of ads.txt on our website.

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



Valid human traffic by platform

94.5%



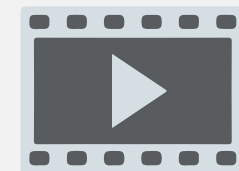
Mobile

94.7%



Desktop

98.0%



Video



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