



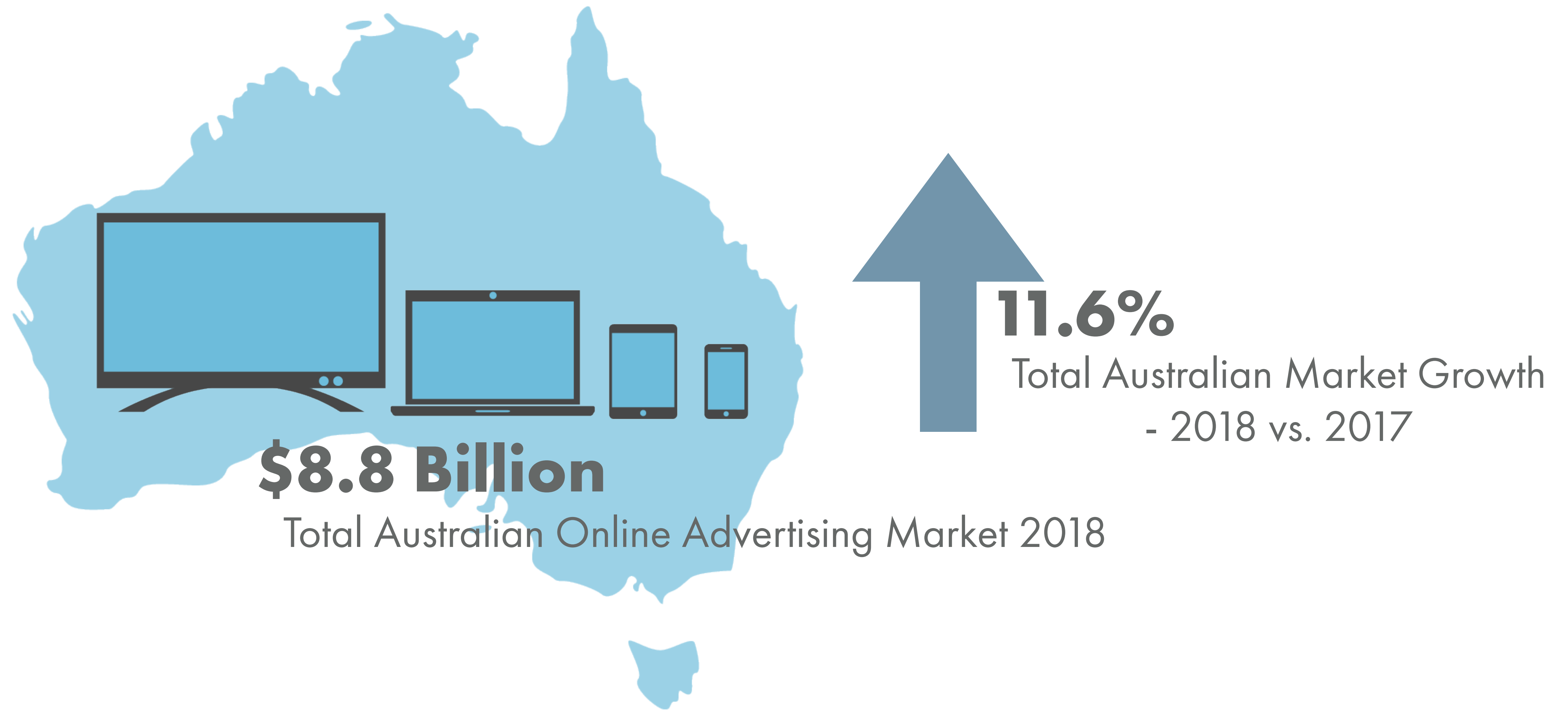
**ADVERTISING
WEEKAPAC**

**ENTERTAINMENT:
THE HIDDEN OPPORTUNITIES IN TODAY'S
DIGITAL CONTENT EXPLOSION**

- **The digital content consumption explosion**
- **The hidden opportunities in digital entertainment content**
- **The right digital environment provides strong benefits to advertisers**

THE DIGITAL LANDSCAPE

THE DIGITAL AD MARKET SUPPORTS THIS CONTENT EXPLOSION



Source: PricewaterhouseCoopers - IAB Online Advertising Expenditure Report CY 2018

THE DIGITAL LANDSCAPE

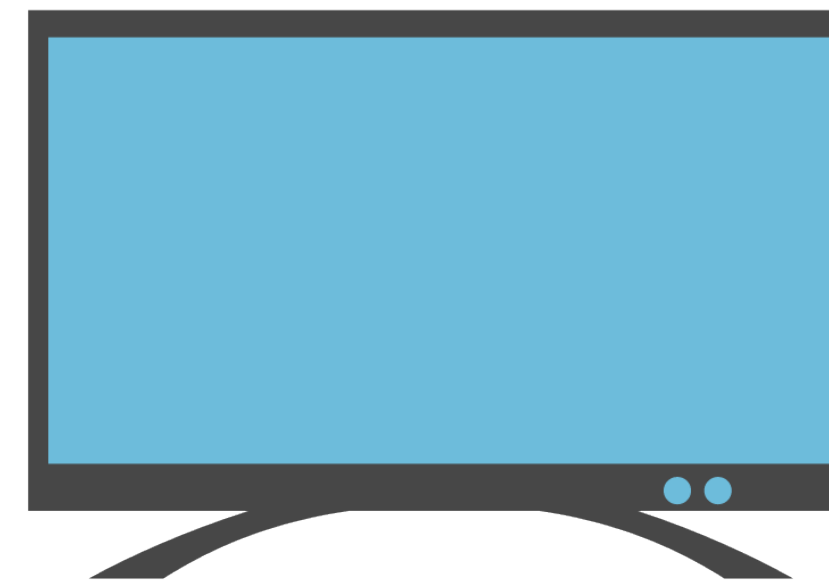
AUSTRALIANS ARE ONLINE EACH DAY ACROSS MULTIPLE SCREENS



16.6 million
+5% YOY
+2 million
in last 2 years



7.9 million
+2% YOY





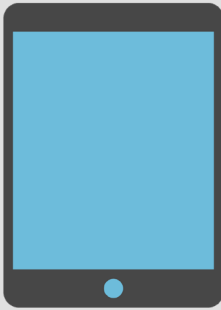
5.7 million
+22% YOY



4.4 million – iPad 1.4 million – Android
+2% YOY iPad
-2% YOY Android

Source; IAB Australia Nielsen Digital Enumeration Study May 2019, ages 14+

AUSTRALIANS CONTINUE TO INCREASE TIME SPENT ONLINE

			
Ave time pp/month	94hrs 55min	21hrs 44min	45hrs 25min
Share of device time	68%	18%	15%
Total time YoY	+39%	-5%	+5%

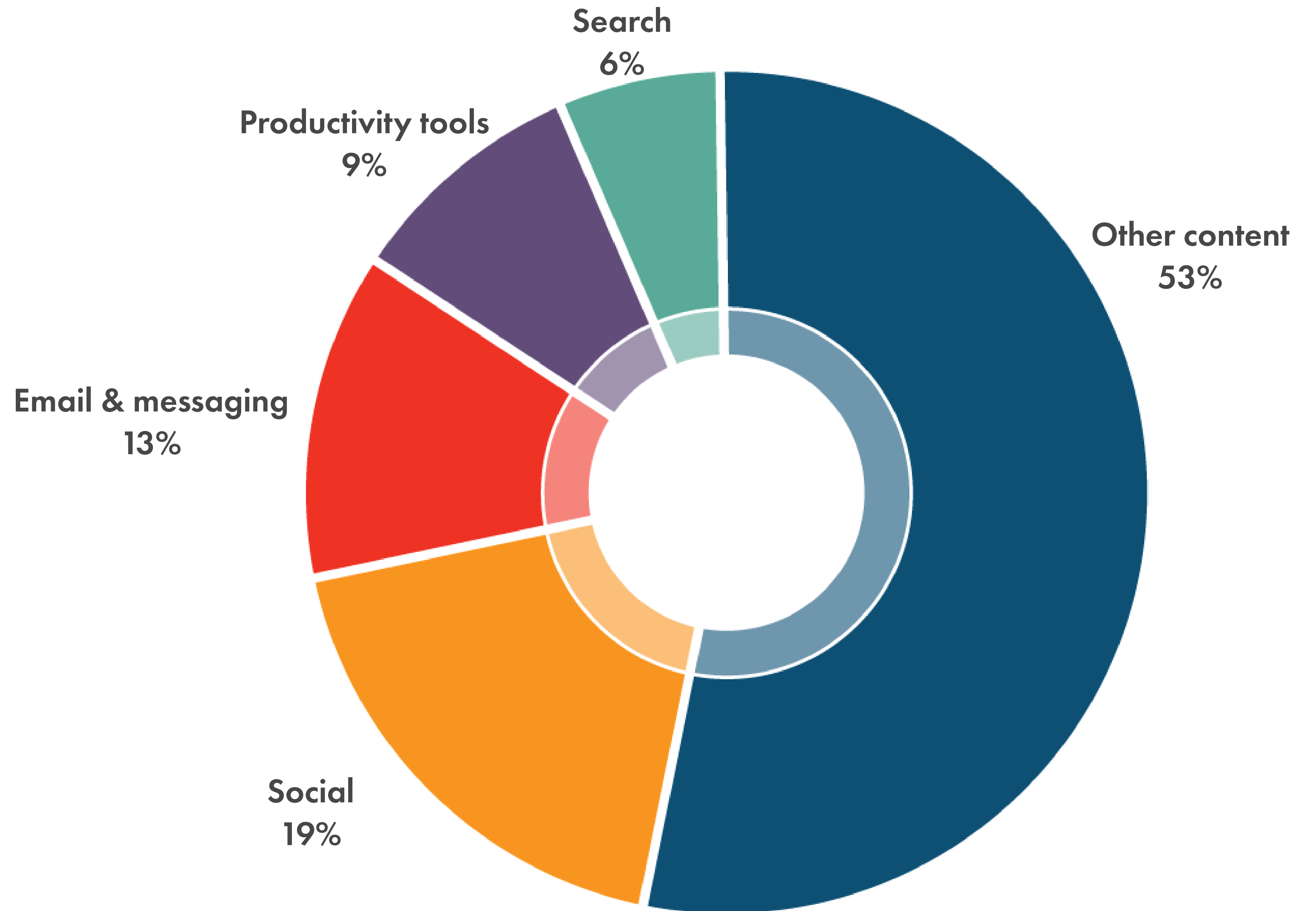
TOTAL TIME SPENT
ONLINE UP 20% YOY

AUSTRALIANS SPEND AN
AVERAGE OF 107 HOURS
ONLINE EACH MONTH

Source; Nielsen Digital Panel, text, May 2019, PC P2+, Smartphone and Tablet P18+

THE DIGITAL LANDSCAPE

47% OF ONLINE TIME IS SPENT USING INTERNET TOOLS SUCH AS SEARCH, SOCIAL, EMAIL, MESSAGING AND PRODUCTIVITY TOOLS.

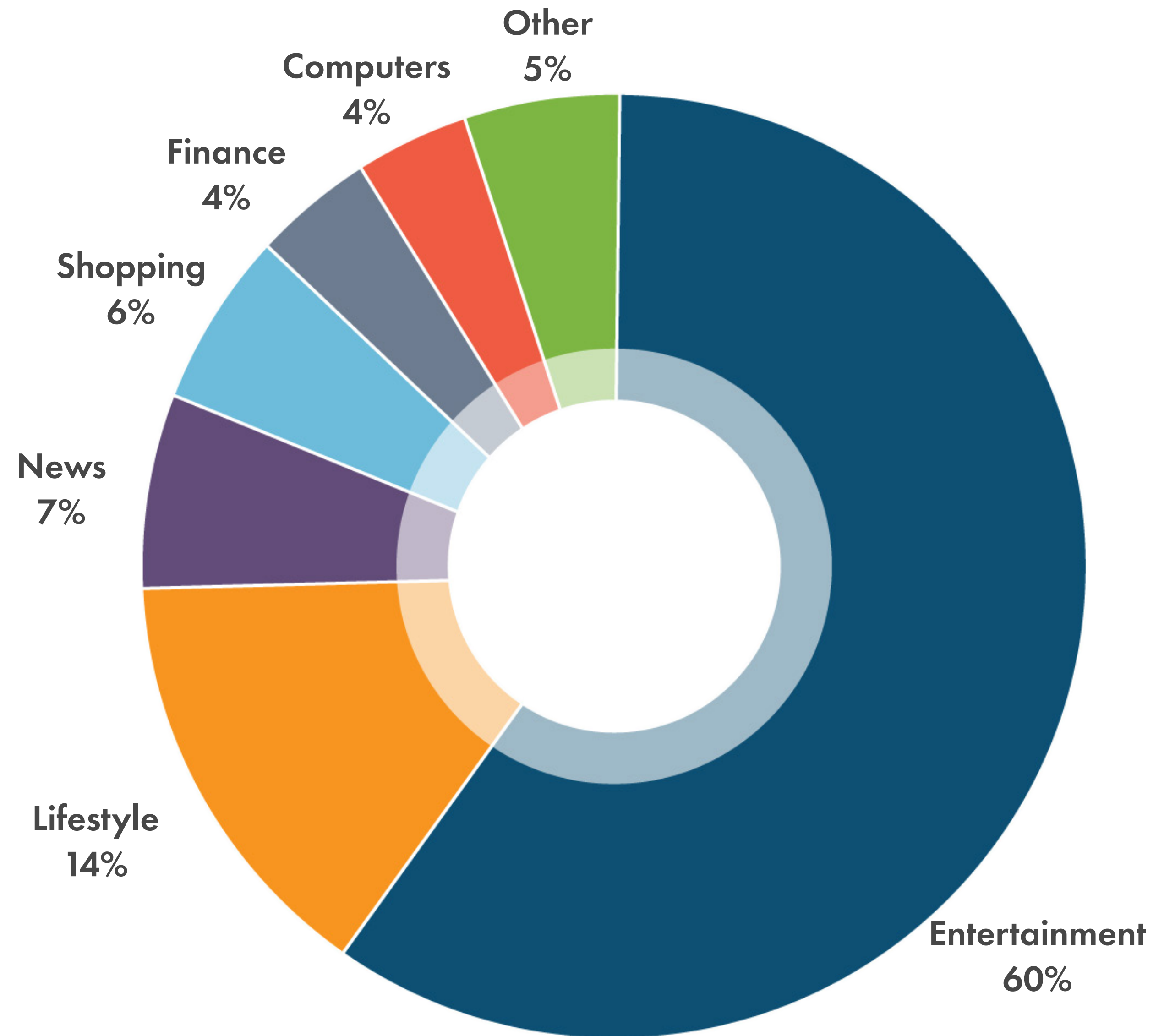


(NOTE: Productivity tools incl online share drives, e.g. Google Drive.)

Source: Nielsen Digital Panel, text, average Jun 2018 - May 2019, PC P2+, Smartphone and Tablet P18+

THE DIGITAL LANDSCAPE

**53% OF ONLINE TIME IS
SPENT CONSUMING
INTERNET CONTENT.**



Source: Nielsen Digital Panel, text, average Jun 2018 - May 2019, PC P2+, Smartphone and Tablet P18+

DIGITAL CONTENT DEEP DIVE: ENTERTAINMENT

IN TOTAL 19.7 MILLION AUSTRALIANS CONSUME SOME FORM OF DIGITAL ENTERTAINMENT CONTENT EACH MONTH

Entertainment Type	Monthly Unique Audience
Video/Movies	18.1m
Music	15.5m
Gaming	15.1m
Broadcast media	13.1m
Sports	11.4m
Books/magazines	8.9m

Source; Nielsen Digital Panel, text, May 2019, PC P2+, Smartphone and Tablet P18+

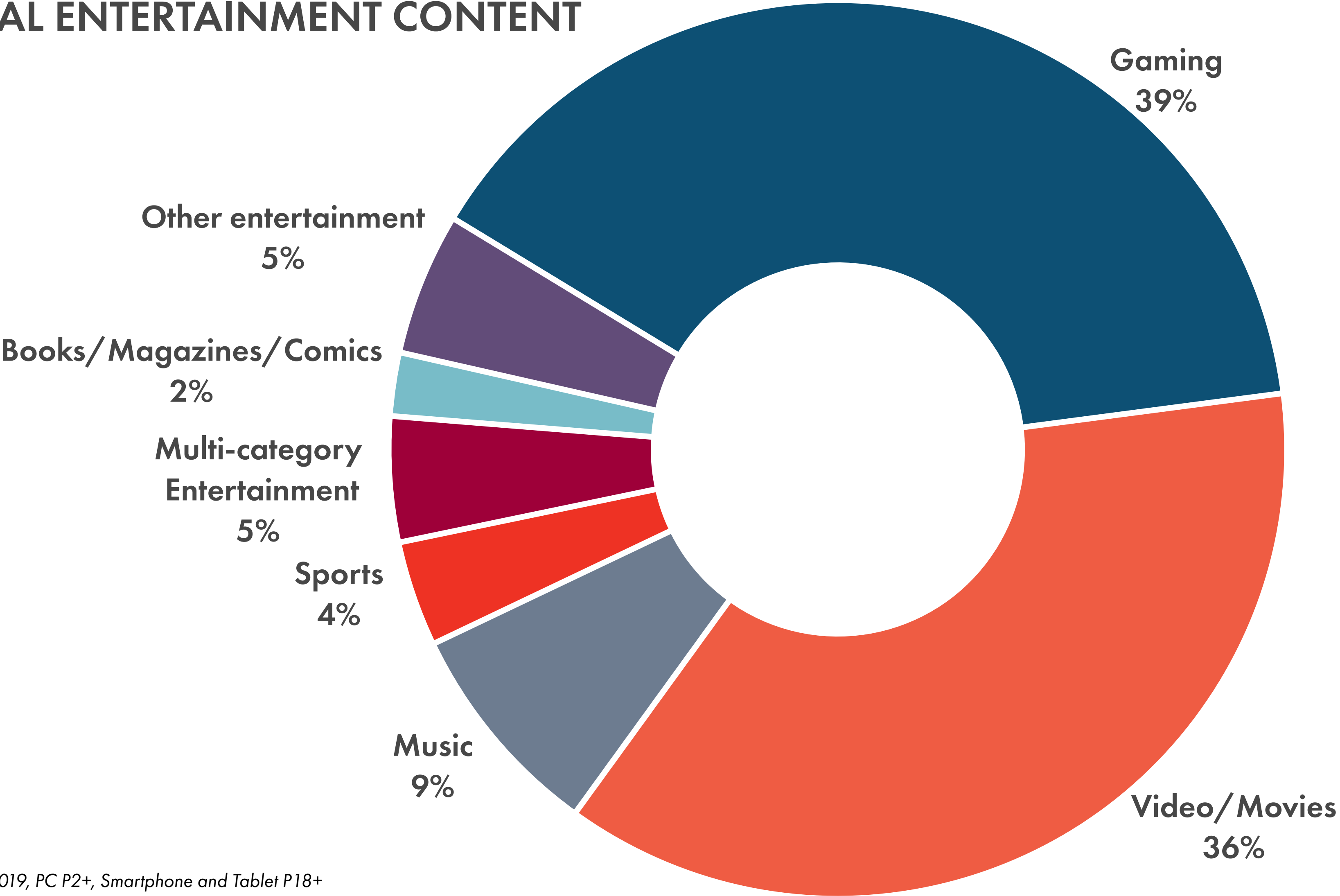
DIGITAL CONTENT DEEP DIVE: ENTERTAINMENT

SHARE OF TIME SPENT WITH DIGITAL ENTERTAINMENT CONTENT

Entertainment
accounts for 31% of
all online time

25% overall increase
in time YoY

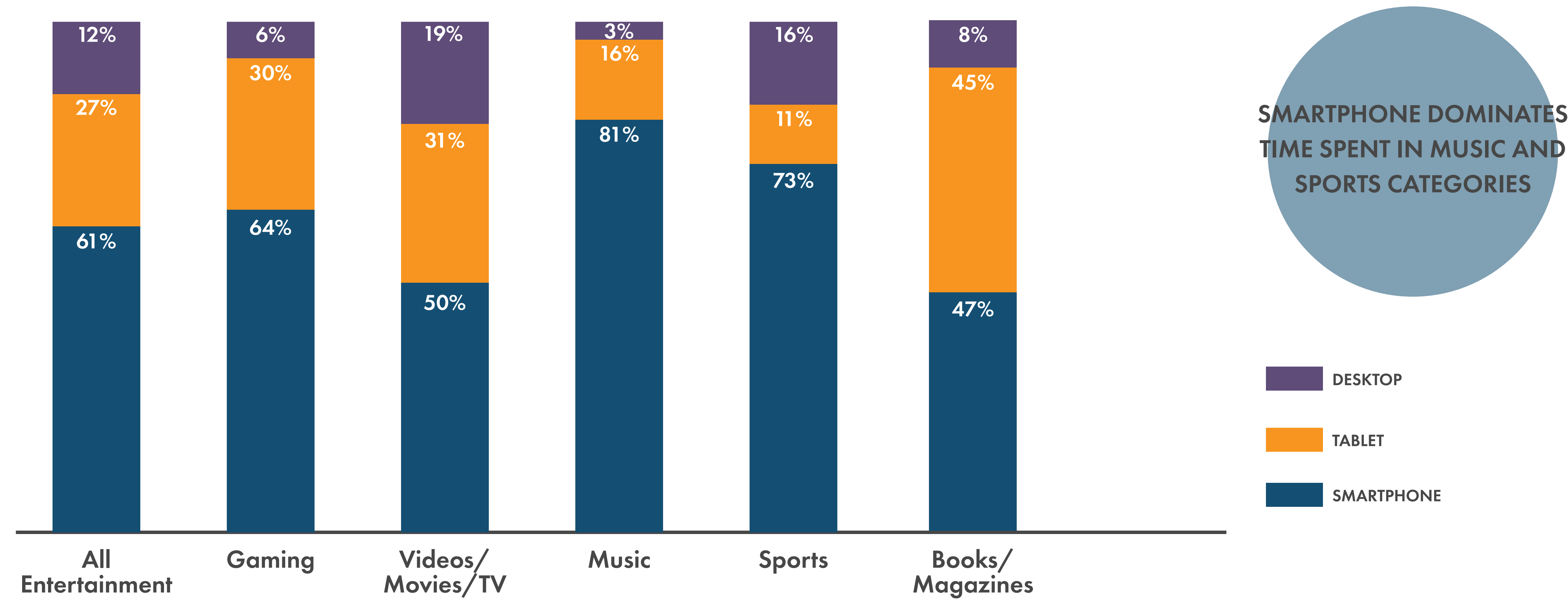
- Music +71%
- Video/movies/TV +35%
- Books +25%
- Gaming +15%
- Sport +9%



Source; Nielsen Digital Panel, text, average Jun 2017 - May 2018 v Jun 2018 - May 2019, PC P2+, Smartphone and Tablet P18+

DIGITAL CONTENT DEEP DIVE: ENTERTAINMENT

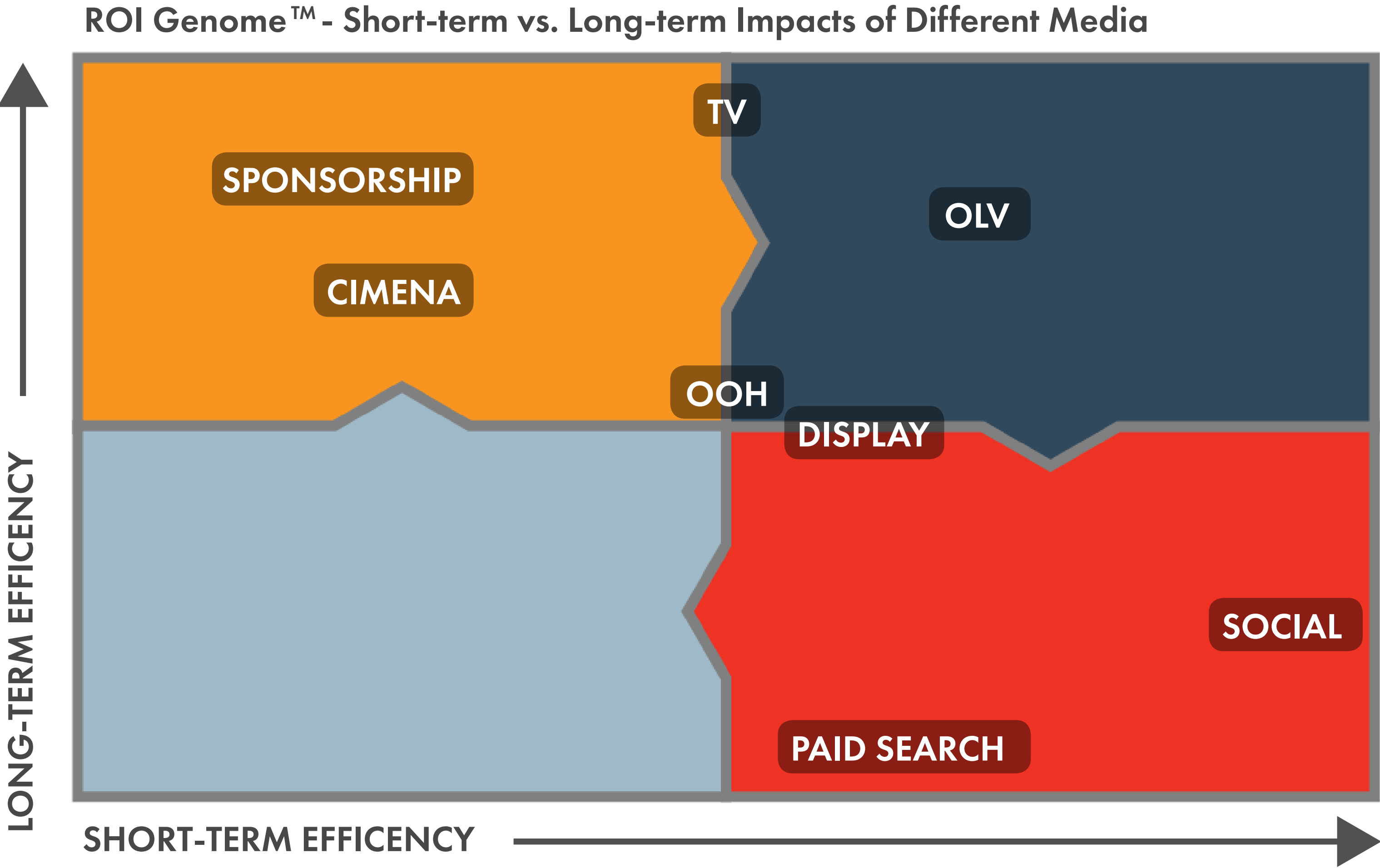
SHARE OF TIME SPENT BY DEVICE IN ENTERTAINMENT CATEGORIES



Source; Nielsen Digital Panel, text, May 2019, PC P2+, Smartphone and Tablet P18+

DIGITAL'S ROLE IN SHORT AND LONG TERM BRANDING

WHEN WE LOOK AT THE LONG TERM RETURNS, TV DOES A GREAT JOB, BUT SO DOES DIGITAL VIDEO



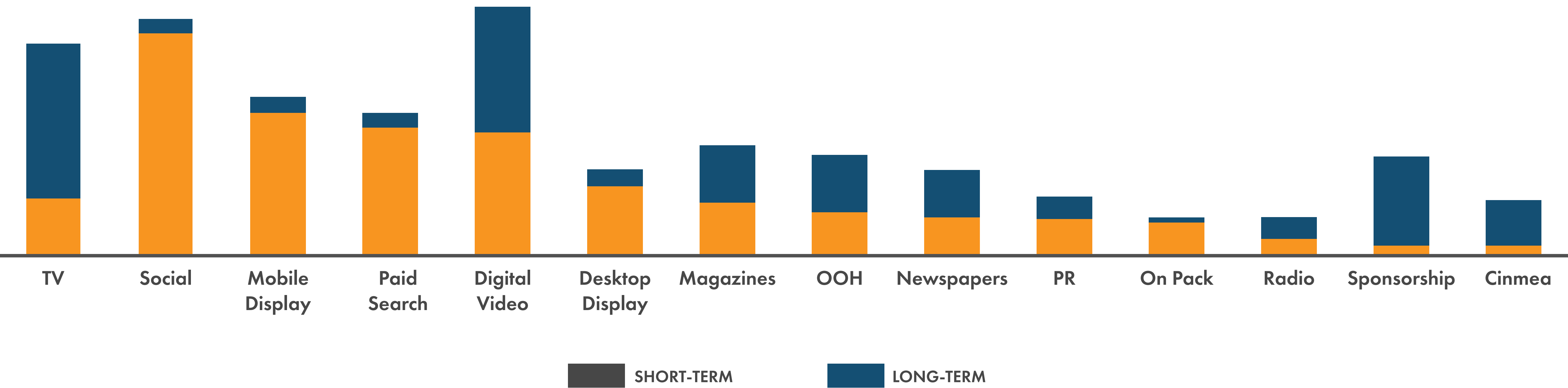
Source; Analytic Partners Genome ROI IAB MeasureUP Conference Presentation 2018

DIGITAL'S ROLE IN SHORT AND LONG TERM BRANDING

DIGITAL PLATFORMS CONTRIBUTE TO LONG-TERM ROI



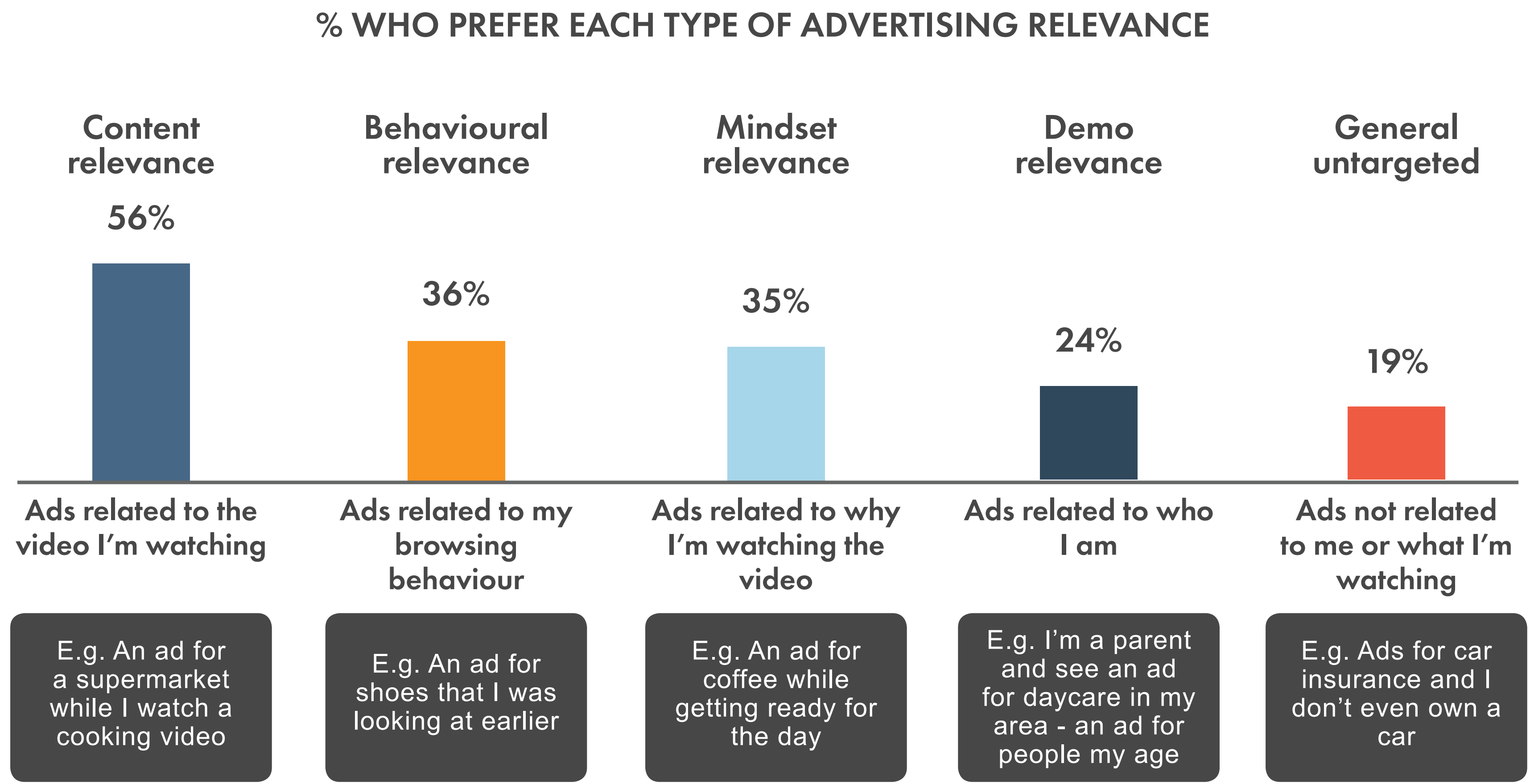
AVERAGE SHORT-TERM ROI PERFORMANCE ACROSS CHANNELS BENCHMARKED TO TV - AUSTRALIA



Source; Analytic Partners Genome ROI IAB MeasureUP Conference Presentation 2018

DIGITAL'S ROLE IN SHORT AND LONG TERM BRANDING

FOR VIDEO ADVERTISING CONTEXTUAL RELEVANCE IS IMPORTANT TO THE CONSUMER



Source: IAB US A Day in the Life of Video Viewers April 2019 n=1544 US consumers | Q - In general, which type of video ads do you prefer?
<https://www.iab.com/wp-content/uploads/2019/05/IAB-Video-Day-in-the-Life-Study-2019-4-3-FINAL.pdf>

CONCLUSION

- Consumption on mobile devices continues to drive increased time spent with digital media. Optimise campaigns to the Smartphone screen and exploit the power of mobile advertising capabilities.
- There are hidden opportunities beyond the big digital categories, in content segments where consumer usage is exploding.
- Digital contributes to achieving short- and long-term ROI. Context has the potential to provide strong benefits for advertising. With increasing regulation on data privacy, expect contextual advertising to become even more prevalent moving forward.