

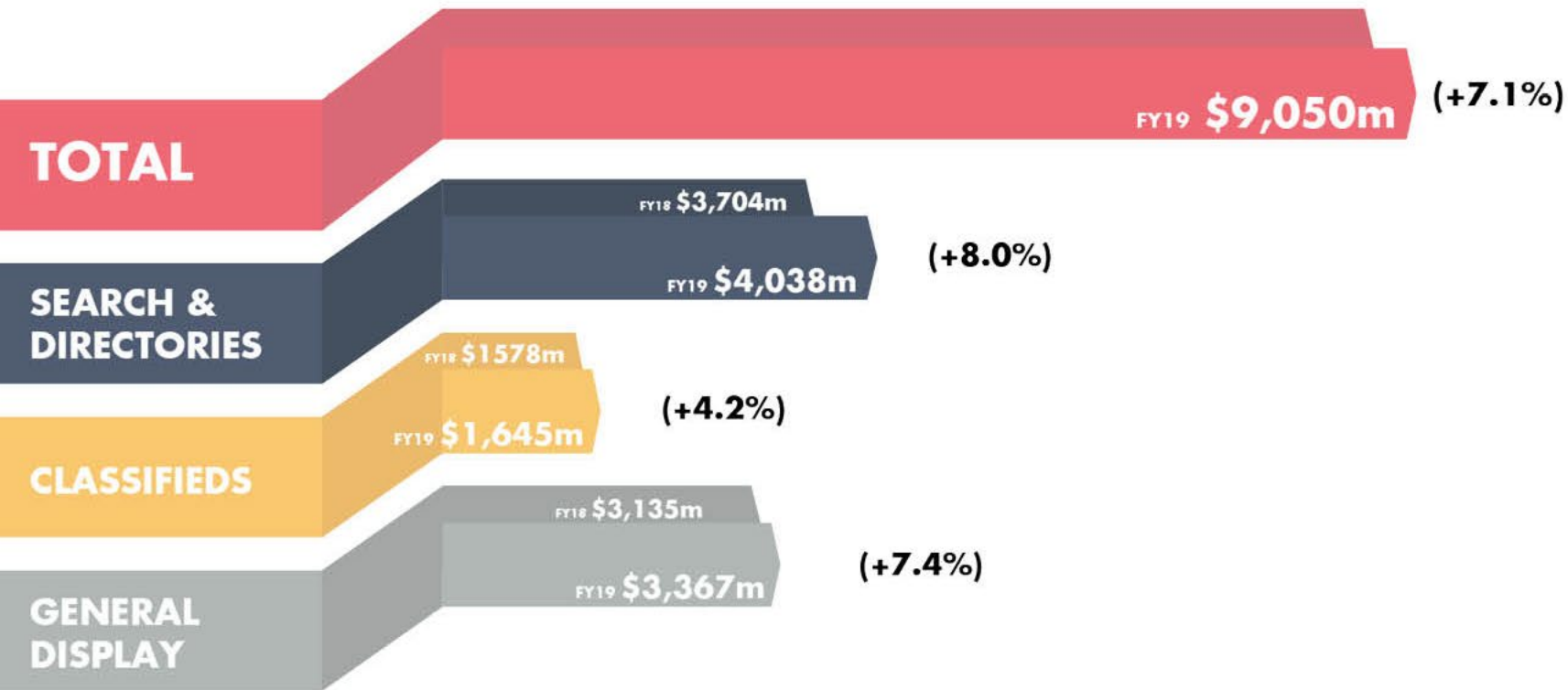


DIGITAL MEDIA REVENUE UPDATE

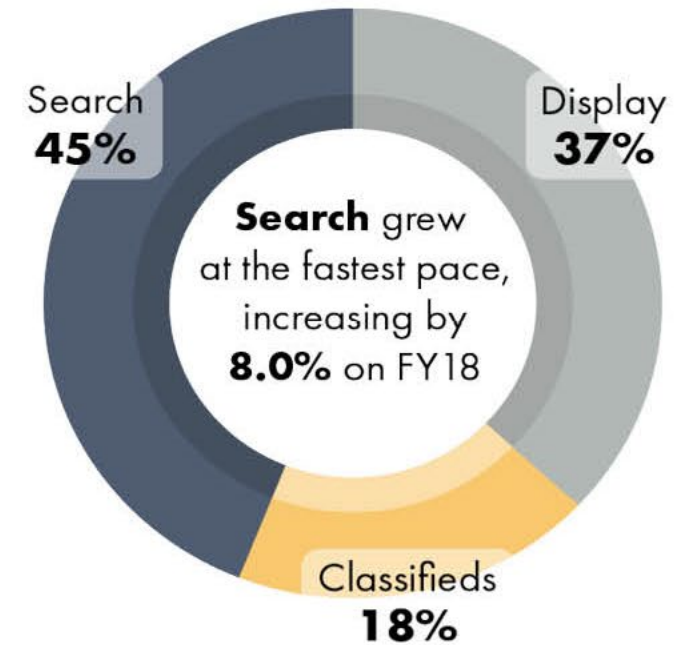
SEPTEMBER 2019

FY19 TOTAL DIGITAL MARKET RESULT

ONLINE ADVERTISING MARKET REVENUE FY 2019: \$9,050m



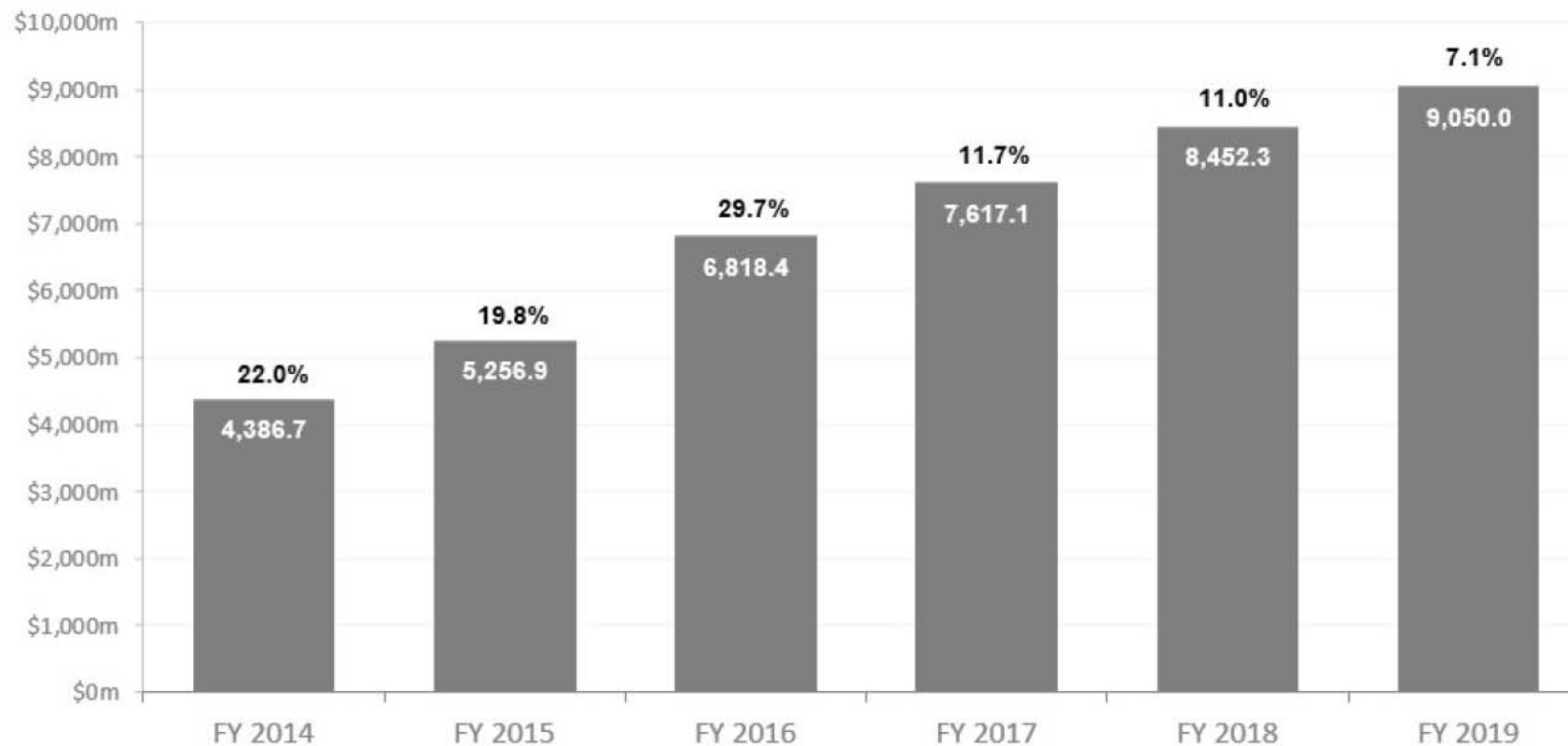
ONLINE ADVERTISING CATEGORY SHARE



DIGITAL'S FIRST YEAR OF SINGLE DIGIT GROWTH

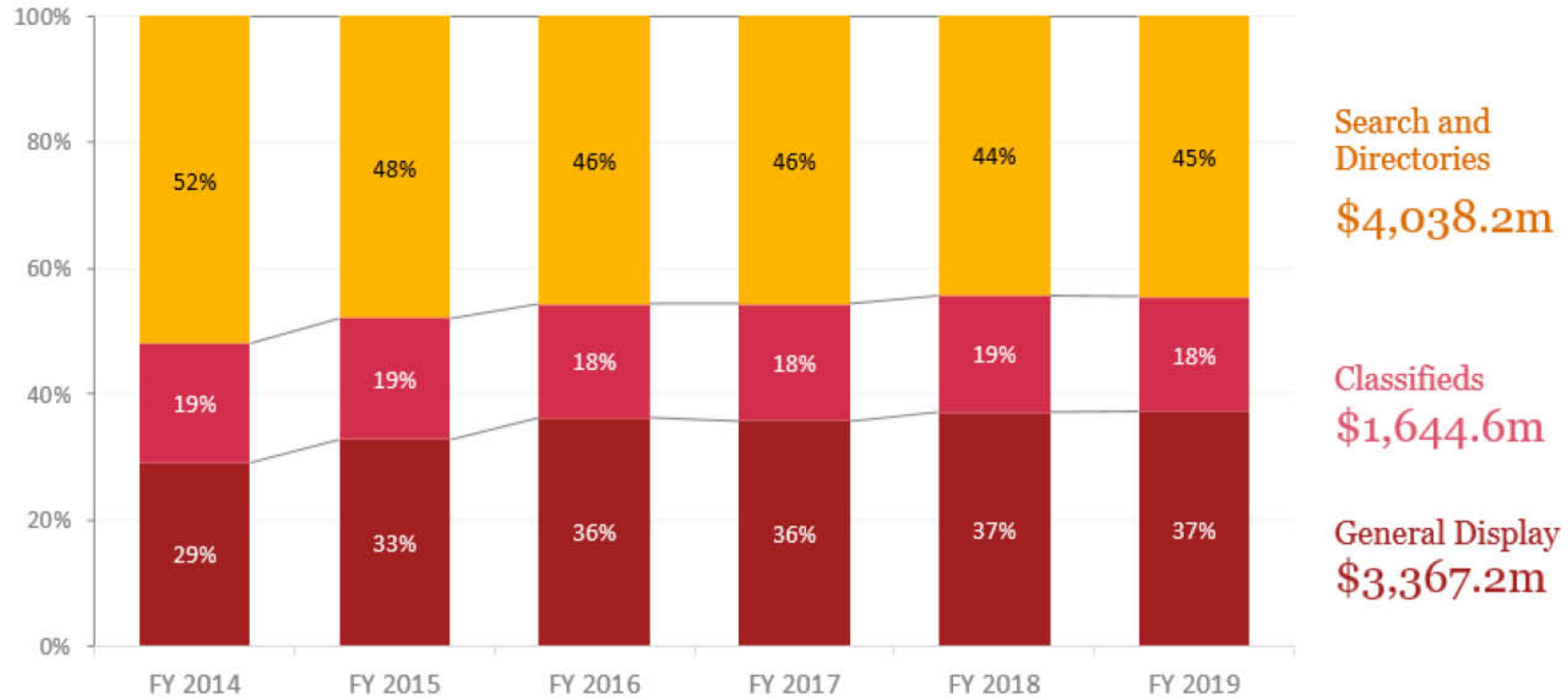
Online advertising growth has slowed to 7% yoy

ONLINE ADVERTISING GROWTH FY14-FY19



Source; IAB Australia Online Advertising Expenditure Report FY2019 compiled by PwC. The report compiled by PwC, solely for the use of the IAB, presents an unaudited aggregation of data provided by members of the IAB as well as estimates developed from publicly available information and other sources.

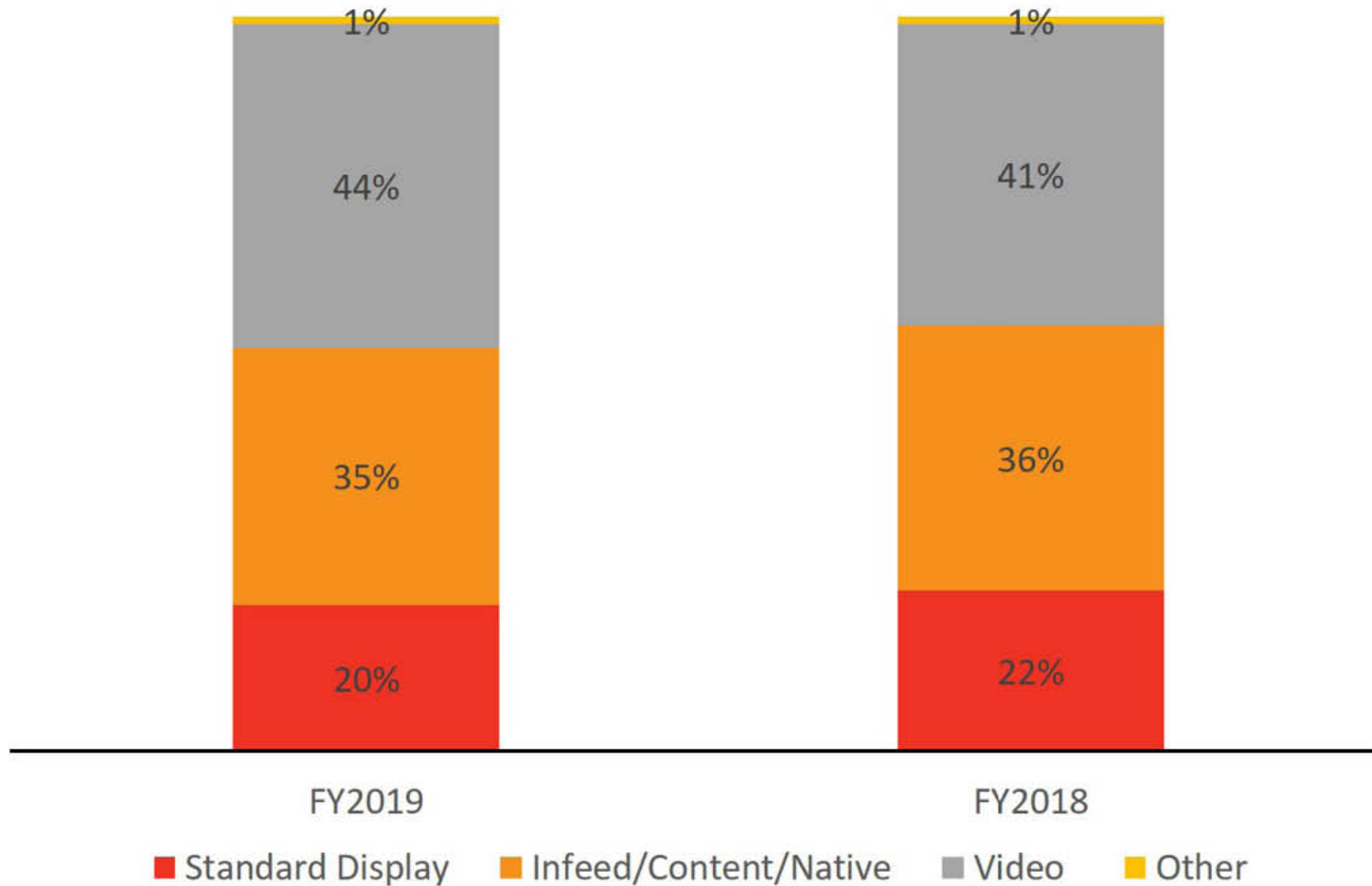
MARKET SPLIT BY REVENUE TYPE



Source; IAB Australia Online Advertising Expenditure Report FY2019 compiled by PwC. The report compiled by PwC, solely for the use of the IAB, presents an unaudited aggregation of data provided by members of the IAB as well as estimates developed from publicly available information and other sources.

DISPLAY FORMAT SHARE COMPARISON

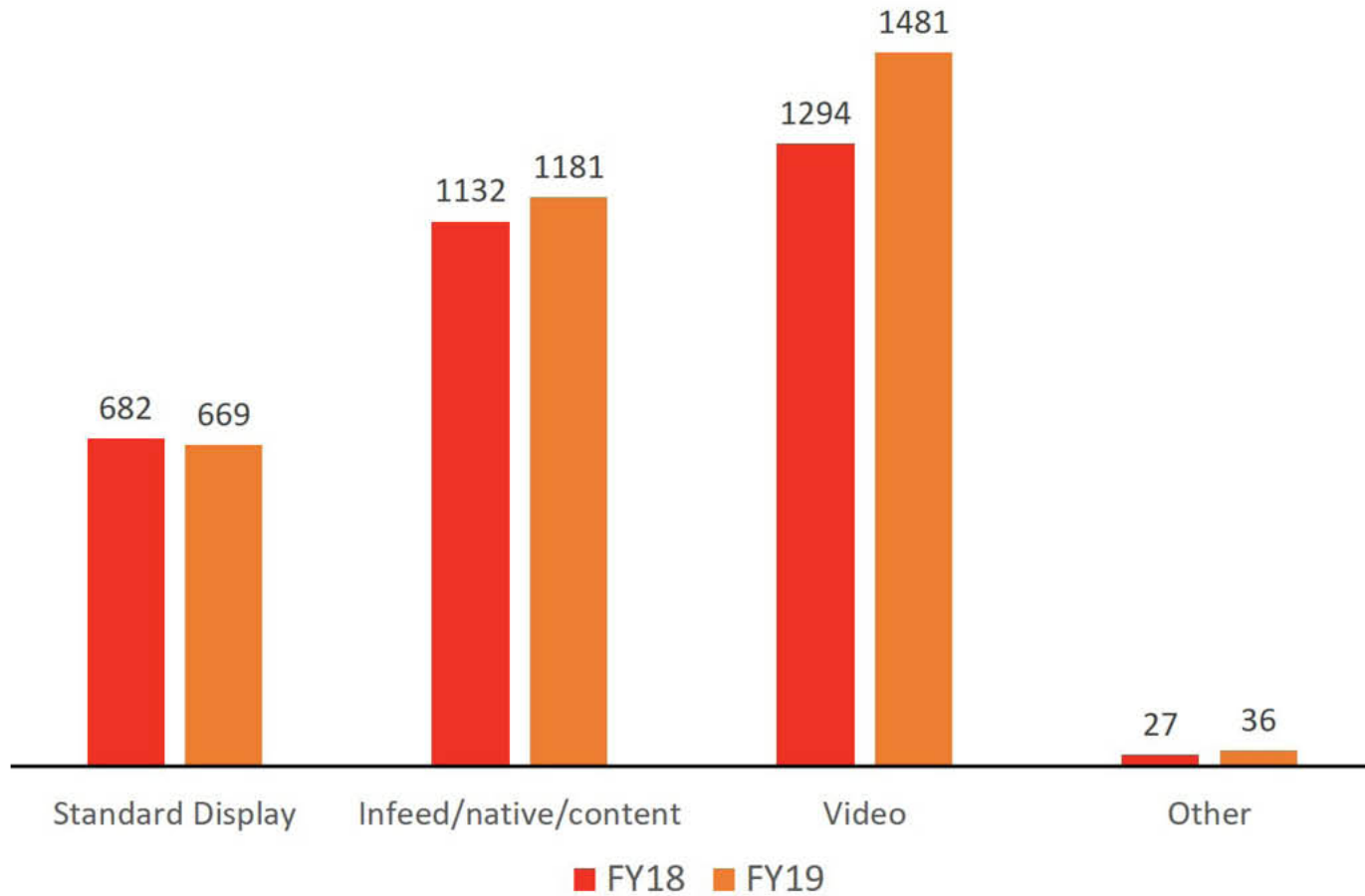
% OF DISPLAY FORMAT SHARE



Video is 44% of share in FY19

DISPLAY FORMAT SHARE COMPARISON

DISPLAY FORMAT SHARE (\$ MILLIONS)

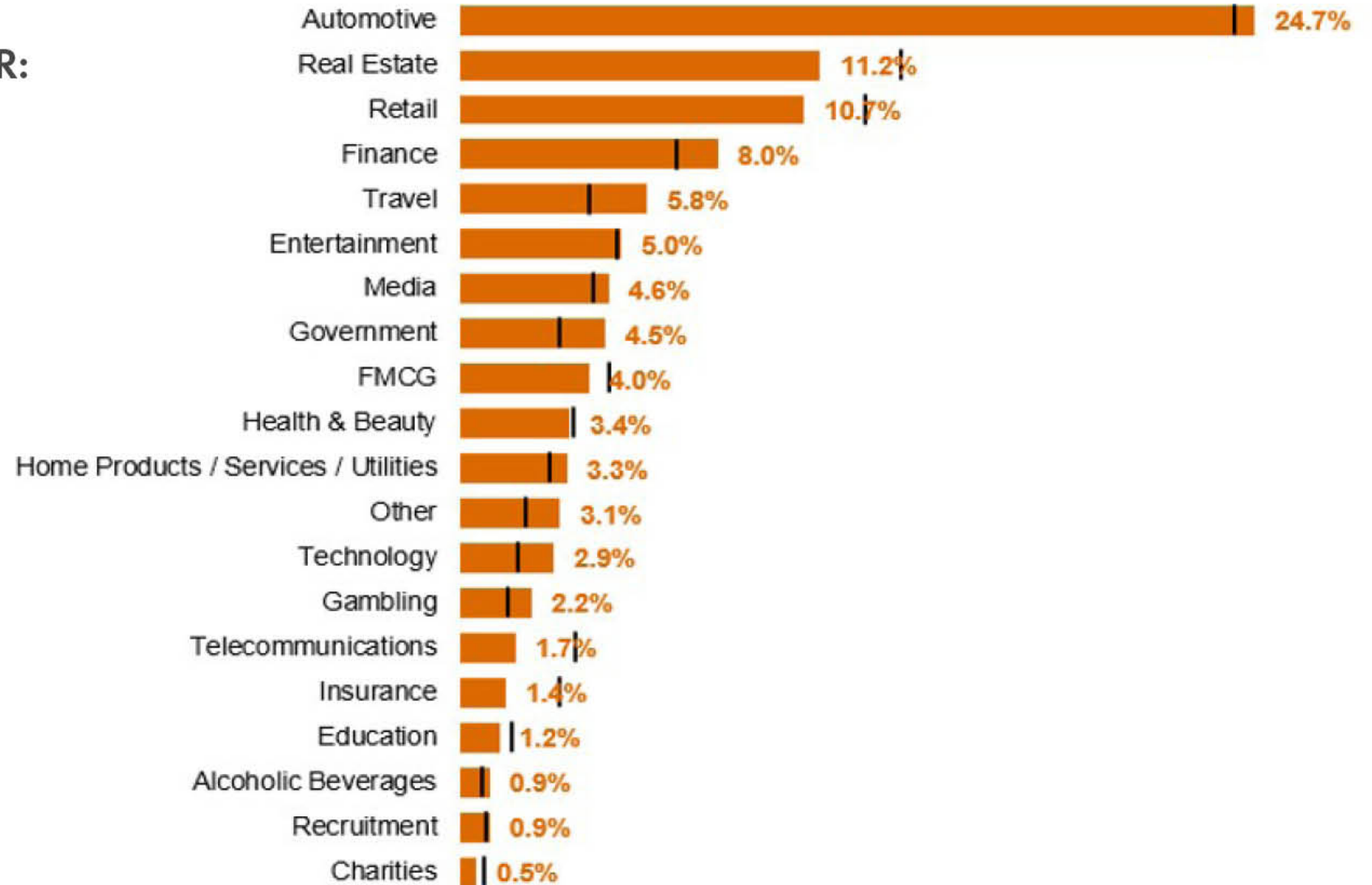


Standard Display sees a slight drop FY19 vs. FY 18

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DISPLAY ADVERTISER CATEGORY

DISPLAY ADVERTISER CATEGORY SHARE VS. LAST YEAR: CONTENT PUBLISHERS

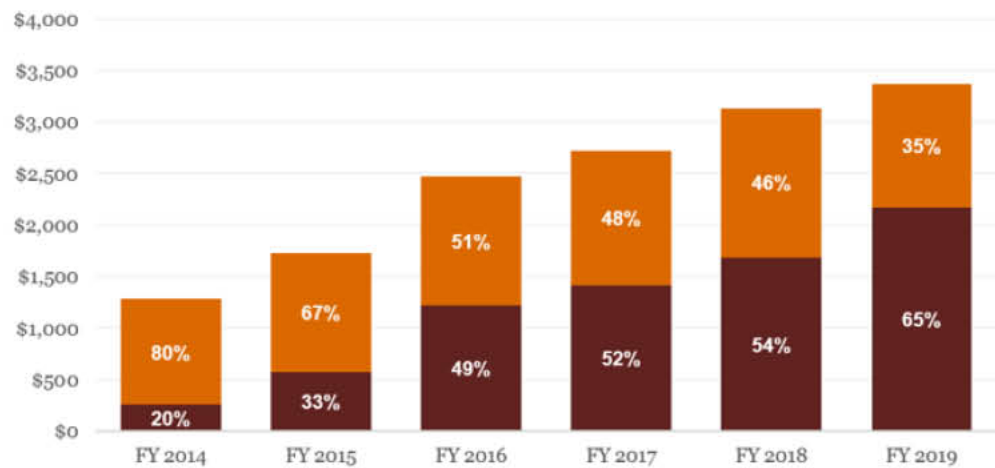


\$1,192.1M
General Display
excluding mobile

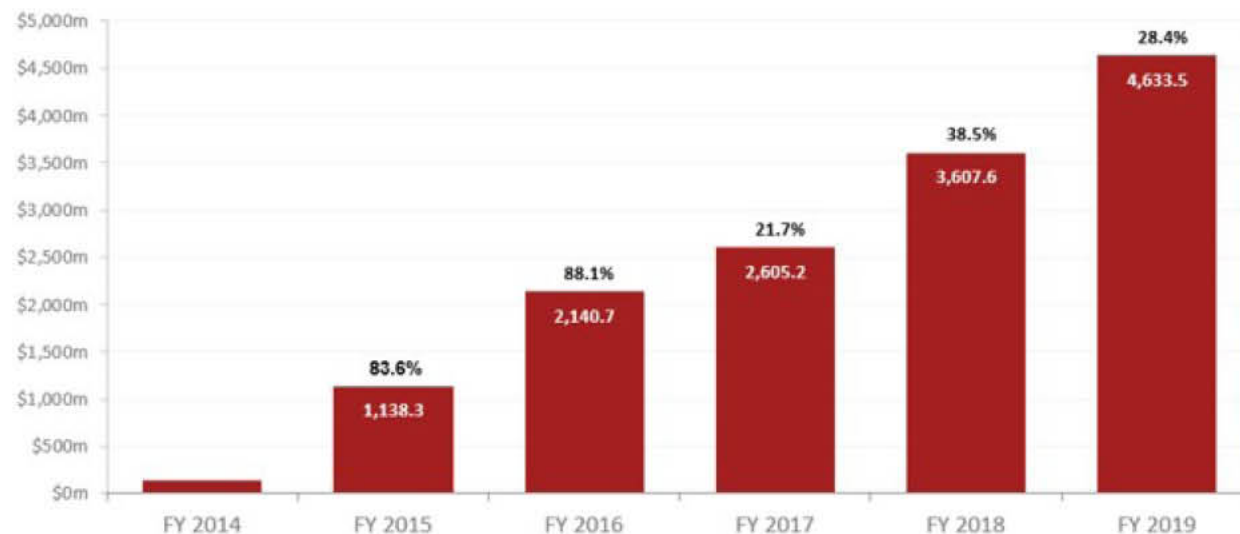


\$2,175.1M
Mobile

DISPLAY – MOBILE vs. OTHER



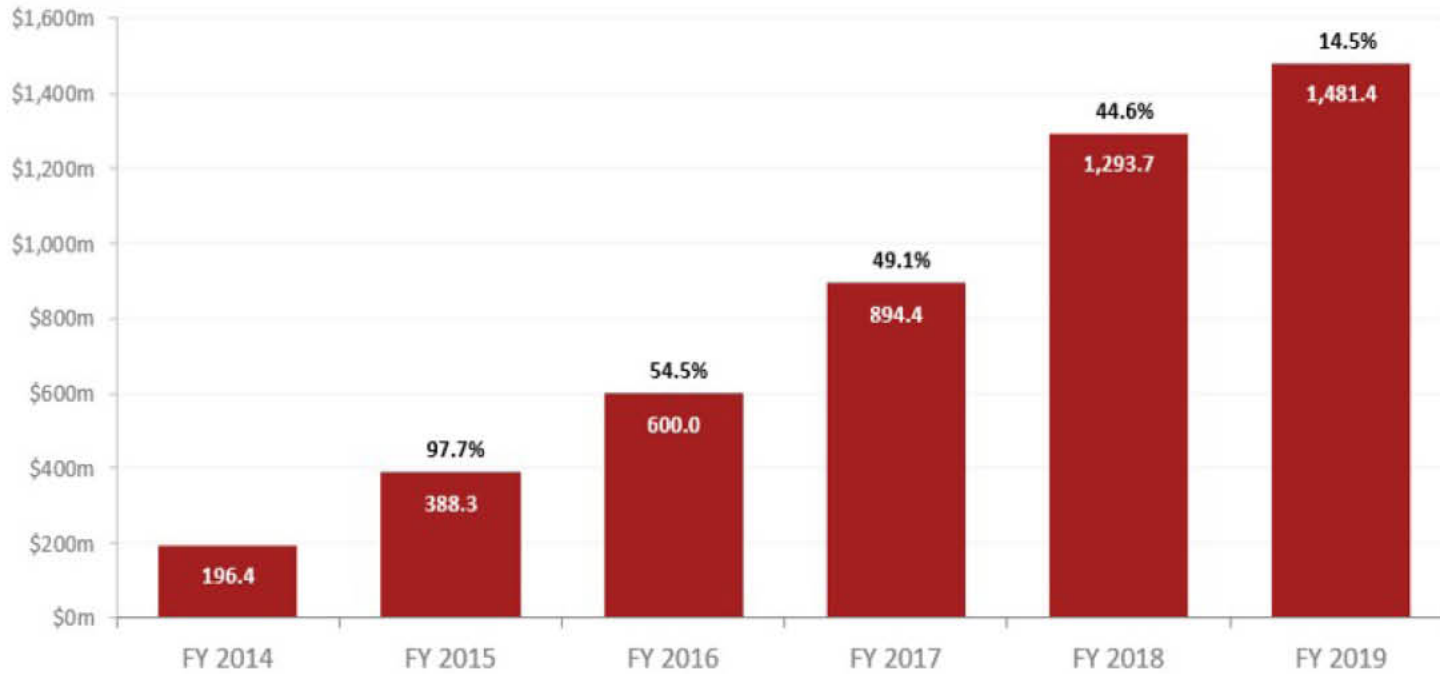
TOTAL MOBILE REVENUE – DISPLAY & SEARCH



\$2175.1M
Mobile display
(Up 29% year on year)

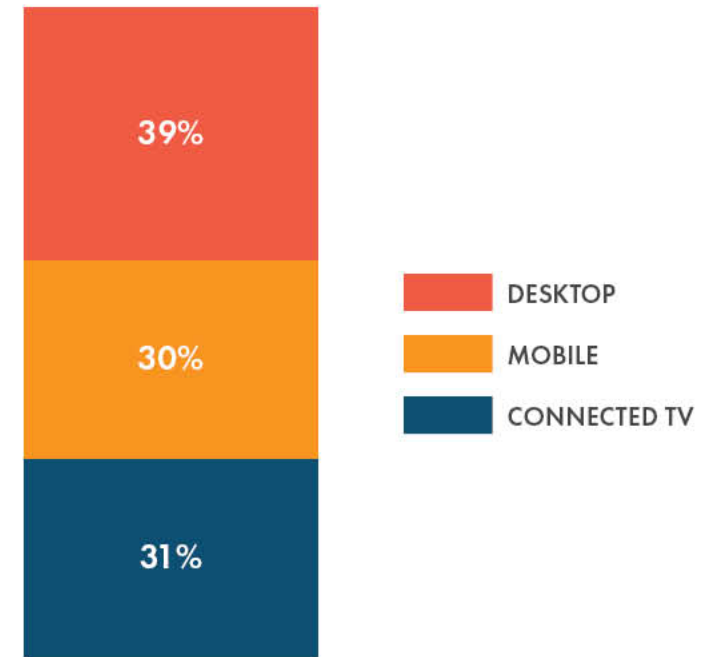
Source; IAB Australia Online Advertising Expenditure Report FY2019 compiled by PwC. The report compiled by PwC, solely for the use of the IAB, presents an unaudited aggregation of data provided by members of the IAB as well as estimates developed from publicly available information and other sources.

TOTAL VIDEO ADVERTISING EXPENDITURE BY FINANCIAL YEAR (\$ MILLION)



VIDEO ADVERTISING EXPENDITURE FOR CONTENT PUBLISHERS, BY DEVICE

(JUNE QUARTER 19)



Source; IAB Australia Online Advertising Expenditure Report FY2019 compiled by PwC. The report compiled by PwC, solely for the use of the IAB, presents an unaudited aggregation of data provided by members of the IAB as well as estimates developed from publicly available information and other sources.

VIDEO ADVERTISER CATEGORY SHARE VS DISPLAY – CONTENT PUBLISHERS

