The State of the Digital Video World 2015

SEPTEMBER 2015

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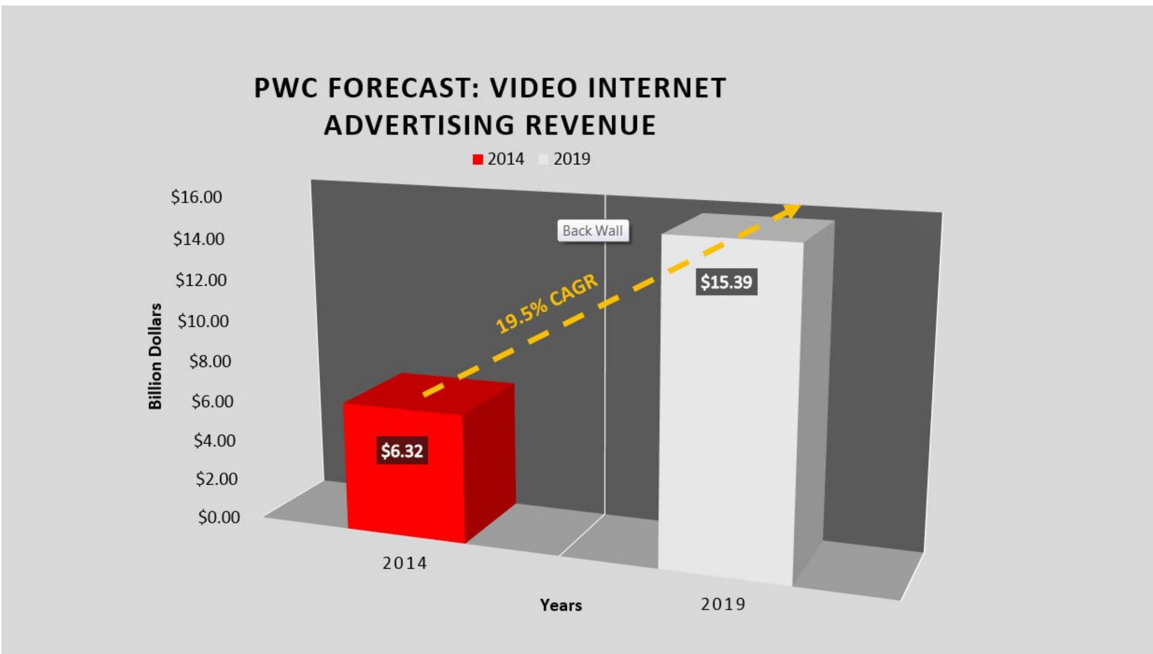
Introduction

In 2015, *IAB's Original Digital Video Consumer Study* found that approximately one in four (24% or 59 million) American adults ages 18+ watch original Digital Video each month, up 13% from a year ago (22%; 52 million). This insight emphasizes the fact that Digital Video continues to rise in media consumption, advertising spend, and content development/distribution in the United States, and this phenomenon holds true in other countries.

The IAB doesn't forecast advertising growth, but such data from other firms can provide useful insights on the industry. For instance, PWC's global forecast reveals that

> "Video exhibits the fastest growth in wired Internet advertising. Although video Internet advertising revenue comprised only 4.7% of total Internet advertising revenue in 2014, it has been identified as a major potential source of growth for publishers and broadcasters alike due to the increased adoption of tablets and the rise of IP-delivered video services. Rising from US$6.32bn in 2014 to US$15.39bn in 2019 at a 19.5% CAGR, video Internet advertising's rate of growth will exceed all other sub-segments of wired Internet advertising revenue." http://www.pwc.com/mx/es/prensa/archivo/20150614-comunicado-prensa-media-outlook-press-pack.pdf

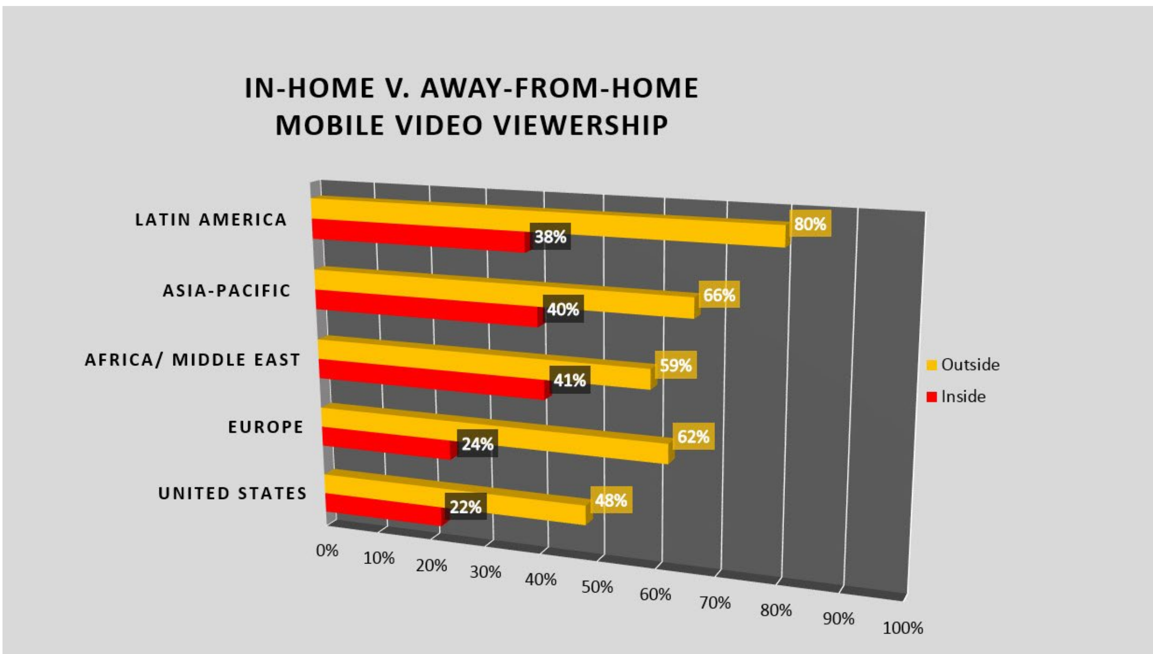


Earlier in 2015, the IAB released *Mobile Video Usage, A Global Perspective*, a survey looking at mobile video viewers in 24 countries around the world. The explicit importance of mobile video across the global landscape was also captured in IAB's *The State of the Mobile World 2014*.

This year the IAB has undertaken a global survey of the state of Digital Video. The IAB tapped into the global IAB footprint to capture country-specific Digital Video ad revenues, wireless and broadband availabilities, inherent opportunities and challenges, and the perceived importance of formats, platforms, and monetization strategies. Of the 19 respondents included in this study, global opportunities, challenges, and perceptions varied across regions, but there were a few key threads that aligned all nations. Across all participating markets, mobile video's importance to the ad business is a continuing trend and programmatic video is viewed as an opportunity for publishers around the globe. Shared challenges include ad blocking, fragmentation of video technology, and the variation of the data and metrics across video platforms.

The global fabric of the Digital Video advertising industry is strong and tightly woven but it is comprised of a variety of threads. For instance, IAB Russia regarded the desktop/laptop web opportunity over mobile video opportunity, while most other participants thought mobile video was equal to or exceeded desktop/laptop video. IAB Denmark emphasized a higher importance in user generated media over premium TV content. And looking at formats, 90% of responding IAB's regarded live streaming content as least important with the stand outs being Mexico and Uruguay, which regarded live streaming as most important.

Nielsen released a global survey, "Screen Wars," in early 2015 that includes a number of valuable video insights. Their research notes that "In-home preference of mobile phones for video viewing is higher in Asia-Pacific, Africa/Middle East and Latin America than in Europe and North America." By contrast, "Outside the home, mobile phone use is similar in Asia-Pacific, Africa/ Middle East and Europe. It's above the global average in Latin America and below in North America." http://www.nielsen.com/us/en/insights/reports/2015/screen-wars-the-battle-for-eye-space-in-a-tv-everywhere-world.html



Clearly, while digital video is a global phenomenon, it's important for marketers and media companies alike to understand how digital video differs from region to region and country to country. By highlighting the priorities and capabilities in the different countries, we hope this anthology of global IAB perspectives on video helps further that understanding.

Canada

Country:	Canada
Digital Video Ad Revenue (2014):	$266 Million (CAN) (USD $201,410,631.60)
Sources:	IAB Canada Internet Advertising Revenue Survey 2014-15
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: 81% LTE (2013), 99% HSPA+ (2013) 2. # of subscribers: 28,586,472 (voice)
Sources:	http://www.crtc.gc.ca/eng/publications/reports/PolicyMonitoring/2014/cmr5.htm#t5-3-11 2. http://www.cwta.ca/wp-content/uploads/2015/08/SubscribersStats_en_2015_Q2.pdf ; http://www.cwta.ca/facts-figures/
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 82% cable (2013), 82% DSL (2013) 2. # of subscribers: 10,256,000 (fixed broadband 2013
Sources:	1. Calculation: 77% fixed broadband in 2013 X 13.32 mil. hhlds in 2011 http://www.crtc.gc.ca/eng/publications/reports/PolicyMonitoring/2014/cmr5.htm#t5-3-11 2. http://www.crtc.gc.ca/eng/publications/reports/PolicyMonitoring/2014/cmr5.htm#t5-3-14 ; http://www12.statcan.gc.ca/census-recensement/2011/dp-pd/hlt-fst/pd-pl/Table-Tableau.cfm?LANG=Eng&T=101&S=50&O=A

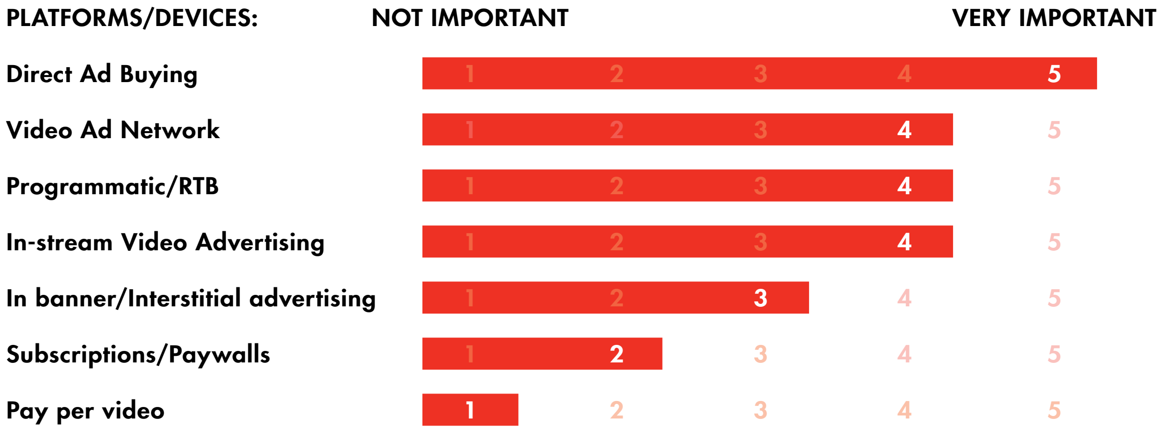
How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT				VERY IMPORTANT
Premium On Demand (ex. TV Shows, Movies)	1	2	3	**4**	5
User Generated (ex. YouTube, Facebook)	1	2	3	**4**	5
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	1	**2**	3	4	5

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT				VERY IMPORTANT
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	1	2	3	4	**5**
OTT Devices (ex. Roku, Chromecast)	1	2	3	**4**	5
Gaming Consoles (ex. Xbox, PlayStation)	1	2	**3**	4	5
Laptop & Desktop	1	2	3	4	**5**

How important is each of the following <u>Digital Video monetization strategies</u> for your members' businesses?



What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. Programmatic Video.
2. Native Video Ads.
3. Mobile Video.
4. New content entering market (increased inventory).

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. Prospect of programmatic devaluation.
2. Shortage of inventory, particularly French.
3. Domestic price implications of transitioning to viewable video impressions.
4. Monetization of live streaming.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

- Revising education curricula to reflect rapid advancements.
- 2016 will see a new event launch around Native Advertising, where many of our opportunities and challenges will be addressed.
- Our new event series entitled "Business of Digital" will help to unpack hurdles like viewability and the price corrections anticipated domestically as a result, in our market.
- We will begin to refine our research studies to better understand/explore consumer interaction with video across various platforms, as well as time spent exposed to ad units within this dynamic format.

Mexico

Country:	Mexico
Digital Video Ad Revenue (2014):	$107,825,976 USD (Exchange Rate 1 USD = 13.3 MXN)
Sources:	IAB Mexico Annual Ad Spend Report 2014 (July 2015) http://www.iabmexico.com/inversion-comunicacion-internet-mexico Infographic: http://www.iabmexico.com/inversion-comunicacion-internet-2015-mexico
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: 2. # of subscribers: 7,500,000 (7.3% of Mobile Lines)
Sources:	The Competitive Intelligence Unit, Mobile Report 2014
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 41% of Mexico population 2. # of subscribers: 12,800,000
Sources:	Statistical Report, 4Q 2014. IFT (Instituto Federal de Telecomunicaciones) http://cgpe.ift.org.mx/4ite14/index.html#top

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) → VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	4
User Generated (ex. YouTube, Facebook)	5
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	5

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) → VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	4
Gaming Consoles (ex. Xbox, PlayStation)	4
Laptop & Desktop	5

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	5
Video Ad Network	5
Programmatic/RTB	5
In-stream Video Advertising	5
In banner/Interstitial advertising	5
Subscriptions/Paywalls	4
Pay per video	3

What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

1. Segmentation and metrics.
2. Increase penetration on mobile devices.
3. Create experiences for consumers on this format.

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

1. Quality and relevance in the content, avoid saturation.
2. Connectivity limitations (WiFi access).
3. Create engagement with the users.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

We have created a Video Board in order to start discussing and defining the Video ecosystem, generating more information and standards that currently do not exist in Mexico.

Also, IAB Mexico has a Video Committee once a month (every third Thursday). As with other Committees in IAB Mexico, it has a president and vice president who work together with the IAB team to define an agenda and a working plan regarding education, best practices, research and others.

United States of America

Country:	United States
Digital Video Ad Revenue (2014):	US $3.3 Billion
Sources:	IAB US Internet Ad Revenue Report
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: 98% of US population 2. # of subscribers: 317,443,800
Sources:	http://www.theverge.com/2015/3/23/8273759/obama-administration-passes-goal-lte-for-98-percent-of-americans http://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 47% of US population 2. # of subscribers: 97,981,000
Sources:	https://www.scribd.com/fullscreen/259862003?access_key=key-qAnhh8lMAWNgTIAzmpv2&allow_share=true&escape=false&view_mode=scroll http://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	5
User Generated (ex. YouTube, Facebook)	4
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	2

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	3
Gaming Consoles (ex. Xbox, PlayStation)	2
Laptop & Desktop	5

How important is each of the following <u>Digital Video monetization strategies</u> for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT → VERY IMPORTANT
Direct Ad Buying	5
Video Ad Network	4
Programmatic/RTB	3
In-stream Video Advertising	4
In banner/Interstitial advertising	4
Subscriptions/Paywalls	2
Pay per video	2

What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. Programmatic video will be big.
2. Mobile video and especially "native" (specific to mobile) video ad formats are going to be important.
3. Creating ads specifically for digital and not just repurposing TV ads.

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. Fragmentation of the video advertising technology landscape.
2. Transition to viewable video impressions and shifts in pricing as a result of that.
3. Rise of live streaming and shorter "snackier" video ad formats.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

IAB's Digital Video Center of Excellence will organize the industry and help develop the video ecosystem as video becomes more ubiquitous.

Sponsor at least one market-making research project.

NewFronts will continue to grow and bring video ad buyers and sellers together.

Continue to evolve the IAB Video Suite (V-SUITE) standards, VAST, VPAID, and VMAP, as well as the Video Addendum to MRAID.

Brazil

Country:	Brazil
Digital Video Ad Revenue (2014)**:**	R$ 811 millions (USD $209,995,003.62)
Sources:	IAB Brazil
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Wifi, 3G, 4G: 2. 71 MM of subscribers – Post Paid 3. 210 MM of access pre paid
Sources:	http://www.anatel.gov.br/dados/index.php?option=com_content&view=article&id=283
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: Cable Modem, DSL, Fiber 2. 25 MM of subscribers:
Sources:	http://www.anatel.gov.br/dados/index.php?option=com_content&view=article&id=269

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	5
User Generated (ex. YouTube, Facebook)	4
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	3

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	3
Gaming Consoles (ex. Xbox, PlayStation)	4
Laptop & Desktop	5

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	5
Video Ad Network	3
Programmatic/RTB	5
In-stream Video Advertising	5
In banner/Interstitial advertising	4
Subscriptions/Paywalls	3
Pay per video	2

What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. Programmatic video.
2. Mobile video.
3. Video on CTV—TV Connected.

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. Transition to viewable video impressions and shifts in pricing as a result of that.
2. Fragmentation of the video advertizing audience across multiple platforms.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

IAB's Digital Video Committee will continue to promote initiatives in order to improve the understanding of the video ad and content industry and help develop the video ecosystem as video becomes more ubiquitous.

Production of White Papers—viewability, TRPs metrics.

Events with branding perspectives through video online.

Colombia

Country:	Colombia
Digital Video Ad Revenue (2014):	Exchange Rate: COP $2.500 (USD $8,121,962.54) Digital Video (Mobile): COP $1.262.635.760 - (USD $505.054) Digital Video (Web): COP $24.301.440.083 – (USD $9.720.576) Total Digital Video Spend 2014: COP $25.564.075.843 - (USD $10.225.630)
Sources:	IAB Colombia Internet Ad Revenue Report https://drive.google.com/file/d/0B4JAKt9WtlYVS0FUa24ybENOSkE/view?usp=sharing
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: 11,6% of Colombian Population 2. # of subscribers: 5.565.663 (2014)
Sources:	Quarterly Report of Information and Communication Technologies (Q4 2014) – MinTIC http://colombiatic.mintic.gov.co/602/articles-8598_archivo_pdf.pdf
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 10,6% of Colombian Population 2. # of subscribers: 5.051.552 (2014)
Sources:	Quarterly Report of Information and Communication Technologies (Q4 2014) – MinTIC http://colombiatic.mintic.gov.co/602/articles-8598_archivo_pdf.pdf

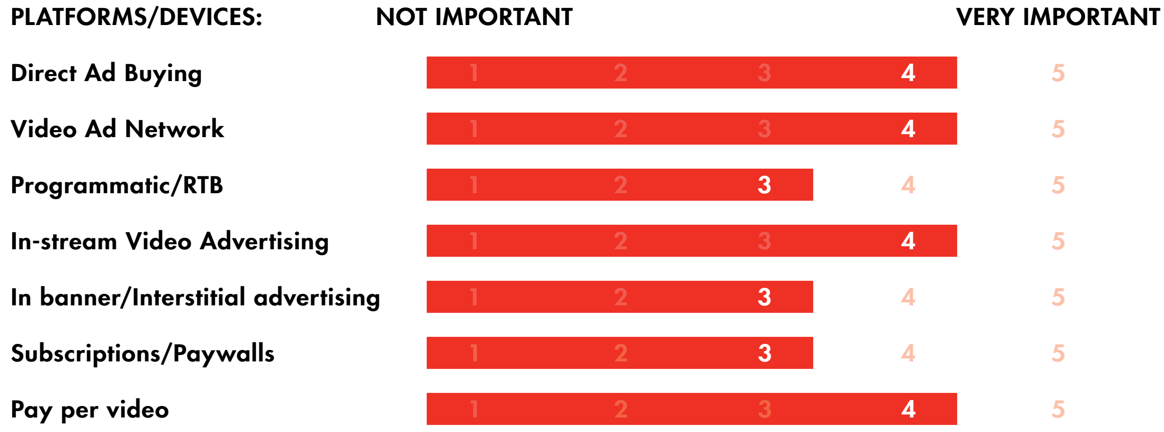
How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT 1 – 5 VERY IMPORTANT
Premium On Demand (ex. TV Shows, Movies)	3
User Generated (ex. YouTube, Facebook)	4
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	3

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT 1 – 5 VERY IMPORTANT
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	4
OTT Devices (ex. Roku, Chromecast)	3
Gaming Consoles (ex. Xbox, PlayStation)	3
Laptop & Desktop	4

*How important is each of the following **Digital Video monetization strategies** for your members' businesses?*



*What do you think will be the biggest video **opportunities** for media companies or advertisers in your country over the rest of 2015?*

1. The opportunity to measure and being able to prove the incremental reach of a TV plus Digital Video strategy.
2. As a part of a content marketing strategy, to become relevant to the audience.
3. Being able to segment the audience.

*What do you think will be the biggest video **challenges** for media companies or advertisers in your country over the rest of 2015?*

1. To create relevant and high quality content.
2. Unify TV and video online metrics.
3. To introduce new and more relevant formats, avoiding the high levels of intrusion.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

During 2016 the plan is to run the second advertisers study to compare the relevance of Digital Video in their communications strategy.

Make Digital Video a priority in our IAB talks and involve our Digital Video affiliates to evangelize the importance and opportunity of this online advertising format.

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Uruguay

Country:	Uruguay
Digital Video Ad Revenue (2014)**:**	No data
Sources:	1. Typical Download Speed: 16,96 Mbps 2. Availability of 4G: Yes 3. # of subscribers: No data.
Wireless Data Service: (ex. Wifi, 4G, 3G)	Comisión Económica para América Latina y el Caribe (CEPAL) (http://www.antel.com.uy/wps/wcm/connect/ab01f180496e14fe9d69fdaf6890d810/S1500587_es.pdf?MOD=AJPERES)
Sources:	1. Typical Download Speed: 22,6 Mbps 2. Availability: 60% 3. # of subscribers: No data.
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Typical Download Speed: 22,6 Mbps 2. Availability: 60% 3. # of subscribers: No data.
Sources:	Comisión Económica para América Latina y el Caribe (CEPAL) (http://www.antel.com.uy/wps/wcm/connect/ab01f180496e14fe9d69fdaf6890d810/S1500587_es.pdf?MOD=AJPERES)

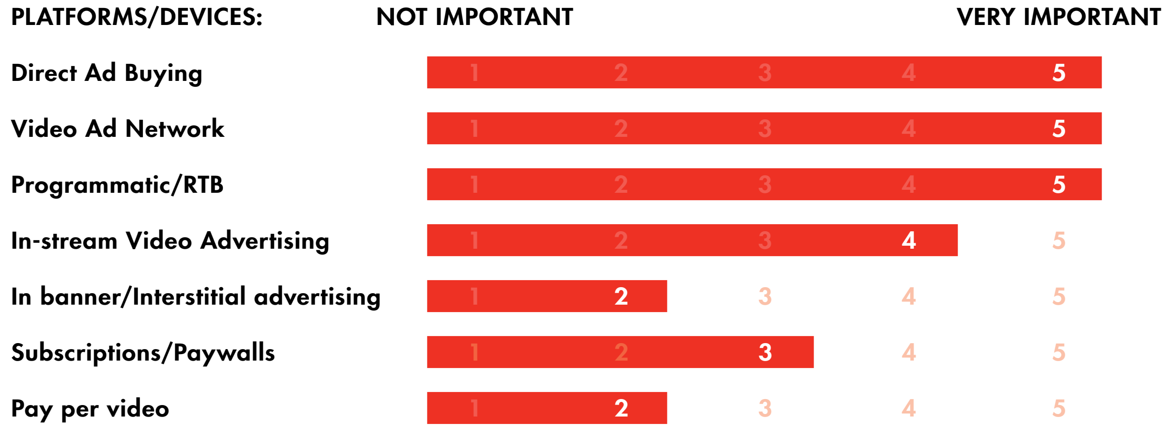
How important is each of the following digital video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT				VERY IMPORTANT
Premium On Demand (ex. TV Shows, Movies)	1	2	3	4	**5**
User Generated (ex. YouTube, Facebook)	1	2	3	4	**5**
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	1	2	3	4	**5**

How important is each of the following digital video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT				VERY IMPORTANT
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	1	2	3	4	**5**
OTT Devices (ex. Roku, Chromecast)	**1**	2	3	4	5
Gaming Consoles (ex. Xbox, PlayStation)	1	2	**3**	4	5
Laptop & Desktop	1	2	3	4	**5**

How important is each of the following digital video monetization strategies for your members' businesses?



What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

1. Creating ads specifically for digital and not just repurposing TV ads.
2. Mobile video and especially "native" (specific to mobile) video ad formats are going to be important.

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

1. Overcome challenges related to our market size, such us not having youtube.com.uy.
2. Education for brand managers so they can better understand the potential of video advertising, despite its perception of being more expensive than other forms of content creation.
3. Transition to viewable video impressions and shifts in pricing as a result of that.
4. Rise of live streaming and shorter "snackier" video ad formats.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

Publish a whitepaper about Digital Video formats and best practices.

Generate an event and/or webinar on the subject.

Belarus

Country:	Belarus
Digital Video Ad Revenue (2014):	(USD $400,000)
Sources:	IAB Belarus estimation
Wireless Data Service: (ex. Wifi, 4G, 3G)	4G not available
Sources:	
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 1022 subscribers per 1,000 people, penetration - 69% population 15-74; 2. # of subscribers: 9,690,000 (8,624,900 individuals), 5,059,000 real users 15-74
Sources:	http://belstat.gov.by/bgd/_2_6/ http://www.gemius.by/

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	5
User Generated (ex. YouTube, Facebook)	2
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	3

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	3
Gaming Consoles (ex. Xbox, PlayStation)	2
Laptop & Desktop	5

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	5
Video Ad Network	4
Programmatic/RTB	3
In-stream Video Advertising	4
In banner/Interstitial advertising	2
Subscriptions/Paywalls	4
Pay per video	4

What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

1. Video Ad Networks making progress.
2. YouTube appeared in Belarus.
3. Large Russian video resources show interest to the Belarussian market.

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

1. The high price of the Digital Video inventory compared with TV ads.
2. No audience research.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

1. Meetings of working groups on Digital Video. General aims—estimation of the digital display ad market, discuss problems, and prospect the development of the industry.
2. IAB Talks—meetings with representatives of video services and advertisers. To promote video ads and exchange experience.
3. Holding workshops for advertisers.

Denmark

Country:	Denmark
Digital Video Ad Revenue (2014):	€ 13.5 million (USD $15,097,050.00)
Sources:	Danish Media Research
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: Yes 2. # of subscribers: 4.1 mio.
Sources:	The Danish Business Authority
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: Yes 2. # of subscribers: 2.4 mio.
Sources:	The Danish Business Authority

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT				VERY IMPORTANT
Premium On Demand (ex. TV Shows, Movies)	**1**	2	3	4	5
User Generated (ex. YouTube, Facebook)	1	2	**3**	4	5
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	1	**2**	3	4	5

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT				VERY IMPORTANT
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	1	2	3	4	**5**
OTT Devices (ex. Roku, Chromecast)	**1**	2	3	4	5
Gaming Consoles (ex. Xbox, PlayStation)	**1**	2	3	4	5
Laptop & Desktop	1	2	3	4	**5**

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT				VERY IMPORTANT
Direct Ad Buying	1	2	**3**	4	5
Video Ad Network	1	**2**	3	4	5
Programmatic/RTB	1	2	**3**	4	5
In-stream Video Advertising	1	**2**	3	4	5
In banner/Interstitial advertising	1	**2**	3	4	5
Subscriptions/Paywalls	1	**2**	3	4	5
Pay per video	**1**	2	3	4	5

What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. YouTubers.
2. Programmatic.

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. YouTube vs. all others.
2. Getting the content format right.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

1 or 2 seminars and new guidelines / standards.

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France

Country:	France
Digital Video Ad Revenue (2014):	€ 224 M (USD $250,499,200.00)
Sources:	SRI Udecam & PWC Observatoire de l'e pub
Wireless Data Service: (ex. Wifi, 4G, 3G)	3G national coverage: about 98% 4G: impossible to get but by operators 71 M mobile subscribers
Sources:	http://arcep.fr/index.php?id=12818&L=0
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	ADSL: 38%
Sources:	N/A

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	3
User Generated (ex. YouTube, Facebook)	4
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	2

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	2
Gaming Consoles (ex. Xbox, PlayStation)	2
Laptop & Desktop	5

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	5
Video Ad Network	5
Programmatic/RTB	4
In-stream Video Advertising	4
In banner/Interstitial advertising	3
Subscriptions/Paywalls	2
Pay per video	2

What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

1. Programmatic video will be bigger and bigger.
2. Mobile video.
3. Creating ads specifically for digital and not just repurposing TV ads.
4. Facebook will see its share of voice growing faster and faster.
5. Growing audience of the replay program.

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

1. Being compliant with the HTML5 standards.
2. Launching of the GRP video by Médiamétrie to make comparisons with TV.
3. The viewability and adblocking issue.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

Planning at least one event and one study.

Ireland

Country:	Ireland
Digital Video Ad Revenue (2014):	€14.3million (USD $16,112,525.00)
Sources:	IAB Ireland PwC Online Adspend Study 2014
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of all Wireless data: Q1 2015: 3,502,280 which is 72.1% of all mobile subscriptions or 76% of population
Sources:	http://www.comreg.ie/ fileupload/publications/ComReg1549.pdf Page 53 Household figure: CSO Q4 2014 = 1,696,600 Population figure: CSO Q4 2014 = 4,623,700
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 65% of Household penetration 27.5% of population 2. # of subscribers: 1,270,914
Sources:	http://www.comreg.ie/ fileupload/publications/ComReg1549.pdf Page 40 Household figure: CSO Q4 2014 = 1,696,600 Population figure: CSO Q4 2014 = 4,623,700

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT → VERY IMPORTANT (1–5)
Premium On Demand (ex. TV Shows, Movies)	5
User Generated (ex. YouTube, Facebook)	4
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	4

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT → VERY IMPORTANT (1–5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	4
Gaming Consoles (ex. Xbox, PlayStation)	4
Laptop & Desktop	5

How important is each of the following <u>Digital Video monetization strategies</u> for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT → VERY IMPORTANT (1–5)
Direct Ad Buying	5
Video Ad Network	4
Programmatic/RTB	4
In-stream Video Advertising	5
In banner/Interstitial advertising	4
Subscriptions/Paywalls	3
Pay per video	2

What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. Growth in Set Top Box Video on Demand.
2. Dynamic ad insertion into Live Video.
3. Programmatic Monetisation.

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. Viewability and Fraud.
2. Shortage of Quality Video Inventory.
3. Programmatic—making the technology work and improving the understanding of programmatic.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

IAB Ireland's Video Council have the following plans for 2016:

- Proving the effectiveness of VOD Advertising by commissioning of follow up research to our The Power of VOD Research conducted 2014 and 2015.
- Promoting best practice and knowledge sharing via our annual Video Conference IAB Video Connect in June 2016.
- Upskilling our market by running a number of Video workshops as well as other workshops eg. mobile, social, programmatic that will include Video content.

Italy

Country:	Italy
Digital Video Ad Revenue (2014):	270 Mio € (USD $301,941,000.00)
Sources:	IAB Italy, Nielsen, Politecnico di Milano
Wireless Data Service: (ex. Wifi, 4G, 3G)	Wi-Fi N.A. 31% smartphone 12% tablet
Sources:	Audiweb
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	N/A
Sources:	

How important is each of the following digital video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	3
User Generated (ex. YouTube, Facebook)	4
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	2

How important is each of the following digital video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	1
Gaming Consoles (ex. Xbox, PlayStation)	1
Laptop & Desktop	5

How important is each of the following digital video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	3
Video Ad Network	5
Programmatic/RTB	4
In-stream Video Advertising	4
In banner/Interstitial advertising	3
Subscriptions/Paywalls	2
Pay per video	1

What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

Programmatic video will increase significantly.

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

Fragmentation of the video advertising technology landscape.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

We will probably organize a dedicated 1-day Seminar.

We are producing educational/training materials on video advertising.

Netherlands

Country:	Netherlands
Digital Video Ad Revenue (2014):	€ 90 million (USD $100,602,000.00)
Sources:	Our annual ad spend report, made by Deloitte on behalf of IAB Netherlands
Wireless Data Service: (ex. Wifi, 4G, 3G)	Penetration of 4G usage in Netherlands: 21% measured in February 2015
Sources:	http://www.telecompaper.com/nieuws/21-nederlanders-maakt-al-gebruik-van-4g-netwerk--1076279
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	N/A
Sources:	N/A

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT				VERY IMPORTANT
Premium On Demand (ex. TV Shows, Movies)	1	2	3	**4**	5
User Generated (ex. YouTube, Facebook)	1	2	3	**4**	5
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	1	2	3	**4**	5

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT				VERY IMPORTANT
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	1	2	3	**4**	5
OTT Devices (ex. Roku, Chromecast)	1	2	3	**4**	5
Gaming Consoles (ex. Xbox, PlayStation)	1	2	3	**4**	5
Laptop & Desktop	1	2	3	**4**	5

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT				VERY IMPORTANT
Direct Ad Buying	1	2	3	**4**	5
Video Ad Network	1	2	3	**4**	5
Programmatic/RTB	1	2	3	**4**	5
In-stream Video Advertising	1	2	3	**4**	5
In banner/Interstitial advertising	1	2	3	**4**	5
Subscriptions/Paywalls	1	2	3	**4**	5
Pay per video	1	2	3	**4**	5

What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

Getting more quality (user-initiated, brand safe, non intrusive) inventory available.

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

We see an ever expanding range of rich media and pop up solutions to serve video in. Oftentimes with sound on by default and no clear close button. This trend is boosting ad-blocker usage in our market with the inherent and known problems this causes.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

We will focus on digitization of TV spot trading and Smart TV ad possibilities. We also might focus on regulating and standardizing video ads to prevent the earlier mentioned risk of increased annoyance and ad-blocker usage.

Norway

Country:	Norway
Digital Video Ad Revenue (2014):	N/A
Sources:	
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: More than 90 % (increasing to 98 % by 2016) 2. # of subscribers: 3,6 million
Sources:	SSB, Telenor, Netcom, TNS Gallup
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 97 % 2. # of subscribers: don't know
Sources:	Government numbers

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	3
User Generated (ex. YouTube, Facebook)	5
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	2

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	1
Gaming Consoles (ex. Xbox, PlayStation)	1
Laptop & Desktop	4

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	2
Video Ad Network	5
Programmatic/RTB	3
In-stream Video Advertising	4
In banner/Interstitial advertising	2
Subscriptions/Paywalls	1
Pay per video	1

What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. Increase in streaming video (declining in linear TV).
2. Programmatic.

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. Adblocking.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

Web TV working group will focus on measurement in the market.

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Russia

Country:	Russia
Digital Video Ad Revenue (2014):	4.85 bn roubles (USD $71,457,523.50)
Sources:	Consolidated estimate of IMHP and GPMD
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: available in all major networks 2. # of subscribers: 4G/LTE - 7 millions (estimate)
Sources:	J&P study, cited in Lenta.ru
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 50% of internet audience use broadband services as main Internet access 2. # of subscribers: N/A
Sources:	TNS M'Index, 2H2014, Russia, cities 100k+., age 16+.

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	4
User Generated (ex. YouTube, Facebook)	3
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	4

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	3
OTT Devices (ex. Roku, Chromecast)	2
Gaming Consoles (ex. Xbox, PlayStation)	2
Laptop & Desktop	4

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	4
Video Ad Network	4
Programmatic/RTB	4
In-stream Video Advertising	4
In banner/Interstitial advertising	2
Subscriptions/Paywalls	3
Pay per video	4

What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. Increase of legal content in Vkontakte (VK – Russian social network) and corresponding increase of inventory.
2. Increase of programmatic video sales share.
3. Audience targeting reach and precision increase on main video sites.

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. Tough and unclear economic situation and possible further decline of ad spending.
2. Increase of mobile and smartphone share in video inventory and lack of mobile audience measurement on the market.
3. YouTube change of video programmatic policies.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

Video Ads Committee of IAB Russia will work through the year, discussing the major issues of the segment.

Discussions on video ads will be initiated at major local industry conferences.

Video ad revenues will possibly be integrated as a separate subsegment into industry revenue estimates by Association of Communication Agencies of Russia (AKAR).

United Kingdom

Country:	United Kingdom
Digital Video Ad Revenue (2014):	£442 million (USD $679,897,660.00)
Sources:	IAB UK / PwC Digital Adspend Study
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: As at May 2015, 89.5% of premises had outdoor coverage from at least one 4G mobile network, an increase of 17.7 percentage points since June 2014 2. # of subscribers: During 2014, total UK 4G mobile subscriber numbers increased from 2.7 million to 23.6 million, taking the proportion of total mobile subscriptions that were 4G to 28% at the end of 2014
Sources:	Ofcom: The Communications Market Report: United Kingdom http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr15/uk/
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: unknown 2. # of subscribers: Fixed broadband connections were reported in 78% of households in 2015
Sources:	Ofcom: The Communications Market Report: United Kingdom http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr15/uk/

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	5
User Generated (ex. YouTube, Facebook)	5
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	3

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	2
Gaming Consoles (ex. Xbox, PlayStation)	2
Laptop & Desktop	5

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT				VERY IMPORTANT
	1	2	3	4	5
Direct Ad Buying					5
Video Ad Network				4	
Programmatic/RTB				4	
In-stream Video Advertising					5
In banner/Interstitial advertising				4	
Subscriptions/Paywalls		2			
Pay per video		2			

What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

1. Programmatic.
2. Out-formats (native / in-feed video).
3. Mobile (as always).

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

1. Premium video supply.
2. Viewability.
3. Fraud.
4. Ad blocking.
5. Brand safety.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

1. Workshops for brands.
2. Effectiveness research.
3. Video conference (circa 300 people).
4. Video council (on-going).

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Turkey

Country:	Turkey
Digital Video Ad Revenue (2014):	100,7 Million TL (USD $33,537,601.29)
Sources:	IAB Turkey AdEx-Tr Digital Ad Revenue Report
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 4G: N/A 2. Availability of 3G: 76% of total Turkish Population 3. # of 3G subscribers: 59.422.663 - this number includes duplications (single person having more than one 3G subscription). Therefore the fact that the unduplicated 3G availability could be less than 76% should be taken into consideration. Note: Turkey Population in 2014 is 77.695.904
Sources:	Turkey Information and Communication Technologies Authority 2015 Q1 Report http://www.btk.gov.tr/File/?path=ROOT%2f1%2fDocuments%2fPages%2f2015_Q1_eng.pdf Population source is Turkish Statistics Institute (Turkstat) http://www.turkstat.gov.tr/
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: 89,9 % in enterprises & 60,2% in households (these percentages are total internet access of enterprises and households taken from Turkstat 2014 data.) 2. # of subscribers: 8.986.919 (TICTA 2015 Q1 Report))
Sources:	1. Turkish Statistics Institute (Turkstat) 2014 data http://www.turkstat.gov.tr/ 2. Turkey Information and Communication Technologies Authority (TICTA) 2015 Q1 Report http://www.btk.gov.tr/File/?path=ROOT%2f1%2fDocuments%2fPages%2f2015_Q1_eng.pdf

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT – VERY IMPORTANT (1–5)
Premium On Demand (ex. TV Shows, Movies)	5
User Generated (ex. YouTube, Facebook)	5
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	4

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT – VERY IMPORTANT (1–5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	2
Gaming Consoles (ex. Xbox, PlayStation)	2
Laptop & Desktop	5

How important is each of the following <u>Digital Video monetization strategies</u> for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT — VERY IMPORTANT
Direct Ad Buying	5
Video Ad Network	5
Programmatic/RTB	4
In-stream Video Advertising	4
In banner/Interstitial advertising	4
Subscriptions/Paywalls	1
Pay per video	1

What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. Use of programmatic and performance based optimization is going to improve the success of video campaigns.
2. Thanks to high tendency of viewing video via mobile devices and ongoing increase of mobile penetration in Turkey, video consumption is expected to continue growing.
3. Native advertising bears opportunities in video, however in order to make most out of native, it should be studied and experienced more in the industry.

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. Despite the fact that online video consumption is high in Turkey, the content quality should increase in order to maintain the current performance level.
2. Direct usage of TV ads in digital is still very common in the industry.
3. Transition to viewable video impressions is expected to become a challenge in late 2015 and 2016.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

A video related white paper and infographic have been released by IAB Turkey in 2015 so far, the number and content of such reports are planned to increase in 2016.

Video content based daily rating reporting is on the 2016 plans of IAB Turkey Internet Audience Measurement study.

IAB Turkey is also open to participating in global research studies among IAB countries.

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New Zealand

Country:	New Zealand
Digital Video Ad Revenue (2014):	NZ$26.22M (USD $16,622,169.00)
Sources:	IAB/PwC Ad-spend Report FY 2014
Wireless Data Service: (ex. Wifi, 4G, 3G)	Wireless Data Service: (ex. Wifi, 4G, 3G) 1. Availability of 4G: 4G is available in most main cities and towns. Currently 50% of the population have access to 4G service.* Global leader in broadband speed testing, Ookla, has revealed Vodafone New Zealand is fastest in its Global Net Index of telecommunications companies for May 2014.** 2. # of subscribers: 3.2M Mobile Connections*** (Number of 4G Connections not known).
Sources:	* http://www.tcf.org.nz/content/22b891ed-2d29-4111-8722-3a13f43003f1.html **https://www.vodafone.co.nz/press-release/global-testing-reveals-vodafone-new-zealand-has-worlds-fastest-mobile-download-/ ***http://www.stats.govt.nz/browse_for_stats/industry_sectors/information_technology_and_communications/ISPSurvey_HOTP2013/Commentary.aspx
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability: Widely available. DSL over phone lines provides two-thirds of broadband access in New Zealand. ADSL2+ is available in most parts of the country, with VDSL2 available in some areas. Ultra-Fast Broadband Initiative - The NZ Government is spending NZ$1.35 billion on public-private partnerships to roll out fibre-to-the-home connection in all main towns and cities with population over 10,000. The programme aims to deliver ultra-fast broadband capable of at least 100 Mbit/s download and 50Mbit/s upload to 75% of New Zealanders by 2019. In total, 1,340,000 households will be connected. In 2015, the Government launched a $152 million to $210 million extension of the original UFB programme, with the aim of extending UFB programme coverage from 75 per cent to 80 per cent of New Zealanders. 2. # of subscribers: As of October 2014, there are 1,916,000 broadband connections and 65,000 dialup connections in New Zealand, of which 1,595,000 are residential and 386,000 are business or government*
Sources:	*"Internet Service Provider Survey: 2014". Statistics New Zealand. 14 October 2014

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT 1 – 5 VERY IMPORTANT
Premium On Demand (ex. TV Shows, Movies)	5
User Generated (ex. YouTube, Facebook)	2
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	4

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT 1 – 5 VERY IMPORTANT
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	4
Gaming Consoles (ex. Xbox, PlayStation)	3
Laptop & Desktop	5

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	5
Video Ad Network	4
Programmatic/RTB	5
In-stream Video Advertising	5
In banner/Interstitial advertising	2
Subscriptions/Paywalls	1
Pay per video	1

What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

1. For media companies, the adoption of mobile video formats to provide more local mobile video inventory across both apps and m-sites. In the near term, mobile video traffic will surpass desktop, especially as app traffic makes up the majority of traffic consumption for video.
2. For media companies, rich creative / interactive video creative (e.g. VPAID / MRAID) to facilitate deeper analytics and engagement.
3. Native video / branded content video using emotional storytelling to engage consumers with the objective of driving brand favourability and purchase intent.
4. Media companies who can efficiently operate with programmatic video will also become more and more successful.

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

1. For media companies, getting the right tech in place to be able to deliver rich and engaging video advertising across desktop and mobile devices. For example, not all NZ major publishers can accept VPAID formats as yet. This requires investment of time for a mid term ROI, as scale of mobile inventory monetized aligns with increased advertiser demand &increase in spend.
2. For advertisers, understanding that Digital Video advertising spans a wide range of formats and opportunities—recognizing the need to create the video for the user experience of where it will be consumed—whether that be in on demand environments, in-stream, Facebook, Youtube, Instagram, etc. Planning in this process at the start of their video strategies so that their video production can span not only TV but multiple digital assets cost effectively.
3. For advertisers, creating better video content and advertising that resonates with their audiences in digital environments (as opposed to simply putting the TVC across digital distribution).
4. For media companies and advertisers alike - Operating in a cookie-less ecosystem via mobile platforms. (Faceboook is possibly leading the charge in this area).
5. As much of an opportunity as programmatic video is it's also a challenge with everyone in a learning phase to get the most out of it.
6. Media companies must find a way to monetize remnant video inventory as the market becomes more and more focused on premium and heavily targeted content.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

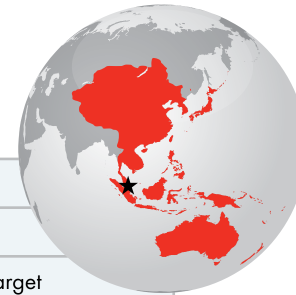
Ad-spend report – plan is to change the way that video is reported to better capture mobile video.

Events – we will be running a full day industry event that will focus on mobile & video. This event is still in the planning stage.

From a Standards & Guidelines Council point of view…Video is a key growth category – for New Zealand the objective is to be able to keep the market informed / abreast of

- The latest creative standards – e.g. VPAID / MRAID; How VPAID may be affected with the demise of flash.
- Global standards and education around such areas as video viewability, measurement, understanding the different purchase models (for example, not all 'cost per view' scenarios are equal given that what constitutes a view may be counted differently across different publishers / platforms).
- Global trends.

Singapore



Country:	Singapore
Digital Video Ad Revenue (2014):	Number not available
Sources:	There has been no research provided for this in the past – this is a target for us for next year
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Availability of 3G: 80.4% of Singapore population 2. # of subscribers: 4,341,800 (minimum 3G subscriber, also includes 4G)
Sources:	https://www.ida.gov.sg/Tech-Scene-News/Facts-and-Figures/Telecommunications#2
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Availability (Residential): 87% of Singapore population 2. # of subscribers: 1,044,000
Sources:	https://www.ida.gov.sg/Tech-Scene-News/Facts-and-Figures/Infocomm-Usage-Households-and-Individuals http://www.singstat.gov.sg/statistics/latest-data#20

How important is each of the following Digital Video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Premium On Demand (ex. TV Shows, Movies)	4
User Generated (ex. YouTube, Facebook)	5
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	4

How important is each of the following Digital Video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	5
OTT Devices (ex. Roku, Chromecast)	2
Gaming Consoles (ex. Xbox, PlayStation)	2
Laptop & Desktop	5

How important is each of the following Digital Video monetization strategies for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT (1) – VERY IMPORTANT (5)
Direct Ad Buying	4
Video Ad Network	5
Programmatic/RTB	4
In-stream Video Advertising	4
In banner/Interstitial advertising	4
Subscriptions/Paywalls	2
Pay per video	2

What do you think will be the biggest video opportunities for media companies or advertisers in your country over the rest of 2015?

1. Programmatic video will play a greater role in the overall media mix.
2. Buying video on a GRP basis will be hugely important as TV penetration is dropping.
3. Mobile video will play a more important role, especially with the increase in TV/video viewing on mobile, and Singapore being a 'mobile first' country.

What do you think will be the biggest video challenges for media companies or advertisers in your country over the rest of 2015?

1. Fragmentation of the video advertising technology landscape.
2. Transition to viewable video impressions and shifts in pricing as a result of that.
3. Ensuring advertisers and agencies are attributing video correctly within the overall digital media mix.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

IAB Video Committee will continue to work on education for clients, publishers and content providers.

Holding regular training days, some for clients and some for publishers to help develop their video offerings, content and production.

Looking to run video specific research into the Singapore market to get solid facts for spend, revenue and activity in region (currently no firm stats for this).

Ensure video as a digital channel is being seriously considered within the Singapore market, pushing to achieve at least 20% of TV budgets by the end of 2016.

South Korea

Country:	South Korea
Digital Video Ad Revenue (2014):	(1) * Digital Ad market (2014): KRW2.9 Trillion (US2.9B$, exchange rate USD $1 =KRW1,000) * Digital Video AD (2014): KRW91B (USD $91M (mobile & web) - 2015(E): USD $118M (2) Digital video AD (2014) KRW 150B (USD $150M), 2015(E) KRW200B (USD $200M)
Sources:	(1) http://onlinead.or.kr/ (Korea Onlinead Association) (2) http://www.digieco.co.kr/KTFront/index.action
Wireless Data Service: (ex. Wifi, 4G, 3G)	1. Typical Download Speed: 4G – 145Mbps / 3G – 3Mbps 2. Availability of 4G: 77% of population (population: 51M) 3. # of subscribers: 4G – 39M / 3G – 13.6M / 2G – 5.4M
Sources:	Http://www.msip.go.kr (Ministry of Science, ICT and Future Planning) (data as of end of May 2015. This is the most recently released data)
Wired Broadband Service: (ex. Cable Modem, DSL, Fiber)	1. Typical Download Speed: 99.8Mbps 2. Availability: 24.5% of population 3. # of subscribers: 12.5M
Sources:	Http://www.msip.go.kr (Ministry of Science, ICT and Future Planning) (data as of end of May 2015. This is the most recently released data)

How important is each of the following digital video formats for your members' businesses?

CONTENT CATEGORIES:	NOT IMPORTANT 1 – 5 VERY IMPORTANT
Premium On Demand (ex. TV Shows, Movies)	4
User Generated (ex. YouTube, Facebook)	3
Live Streaming (ex. TwitchTV, Concerts, Sports, Ustream)	4

How important is each of the following digital video platforms/devices for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT 1 – 5 VERY IMPORTANT
Smart Phones & Tablets (ex. iPhone, iPad, Galaxy)	4
OTT Devices (ex. Roku, Chromecast)	2
Gaming Consoles (ex. Xbox, PlayStation)	2
Laptop & Desktop	4

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How important is each of the following <u>digital video monetization strategies</u> for your members' businesses?

PLATFORMS/DEVICES:	NOT IMPORTANT				VERY IMPORTANT
Direct Ad Buying	1	2	3	**4**	5
Video Ad Network	1	2	3	**4**	5
Programmatic/RTB	1	2	3	**4**	5
In-stream Video Advertising	1	2	3	**4**	5
In banner/Interstitial advertising	1	2	3	**4**	5
Subscriptions/Paywalls	1	2	3	**4**	5
Pay per video	1	2	3	**4**	5

What do you think will be the biggest video <u>opportunities</u> for media companies or advertisers in your country over the rest of 2015?

1. Fast growing rate of Digital Video ad demands (yearly 30%+).
2. Online/Mobile game companies are emerging as the big money-spending advertisers of TV ads. Annual revenue of US$100M+ game companies can afford the TV ads. Those making revenue of less than that are looking at digital ads, instead of TV.

What do you think will be the biggest video <u>challenges</u> for media companies or advertisers in your country over the rest of 2015?

1. No Digital Video ad channel has firmed its position as the winner yet. Advertisers are confused about which channel to choose. Some media channels created their own proprietary video ad platforms, but there is no market dominator. There are more new channels coming: ex) Vungle has recently set up its Korea office, along with Unity Ad & Ad Colony.
2. RTB & programmatic buying is now a buzz word in Korea too, but it is in the stage of development rather than being actively used.

What is your IAB planning to do in the Digital Video area for 2016? Any research, events, papers, webinars, committees and/or councils planned?

N/A