

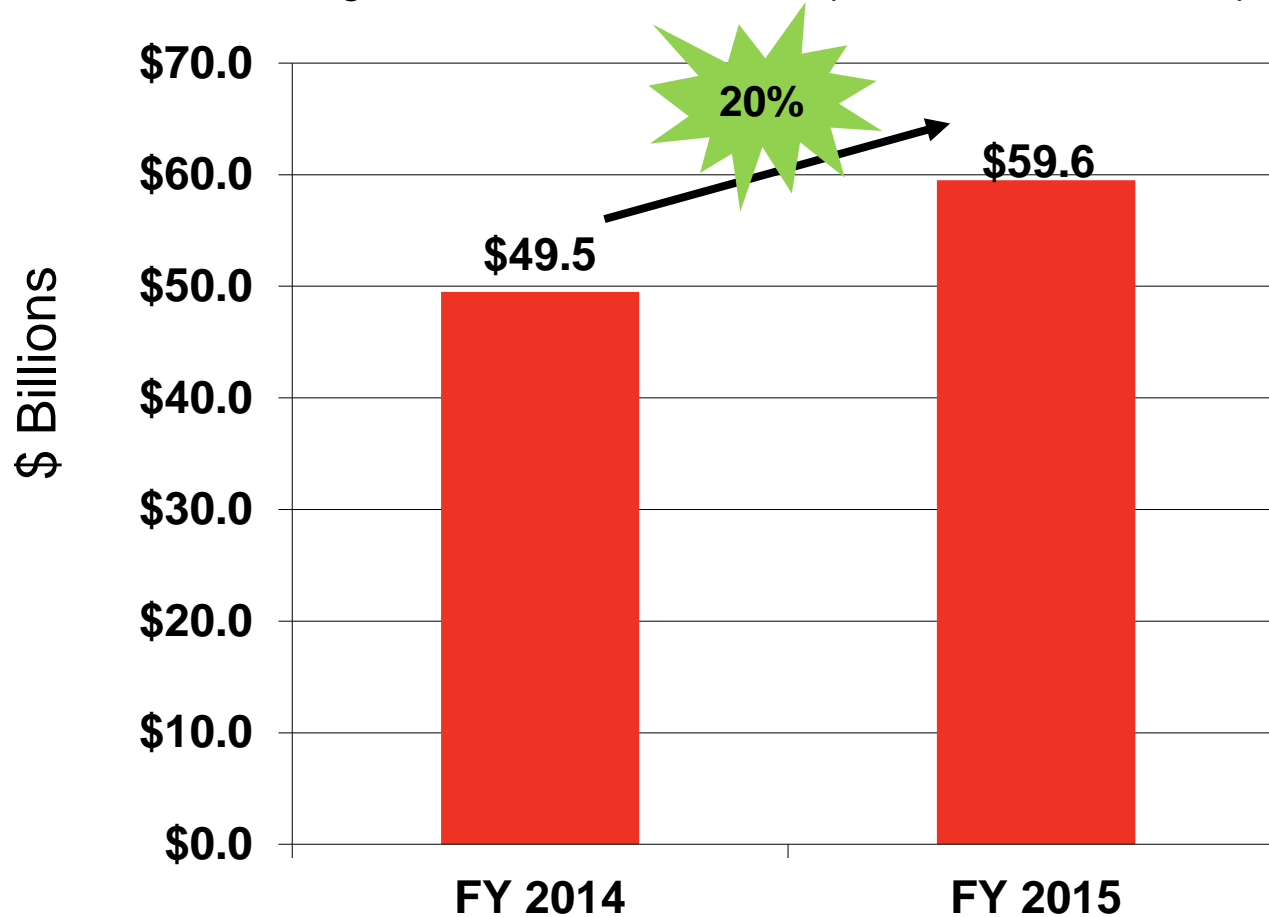


Digital Advertising Fast Facts

October 2016

Digital and Mobile Advertising Generated \$60B in Revenue in 2015, Growing 20% from the Previous Year

Digital Ad Revenue Growth (FY 2014 vs. FY 2015)

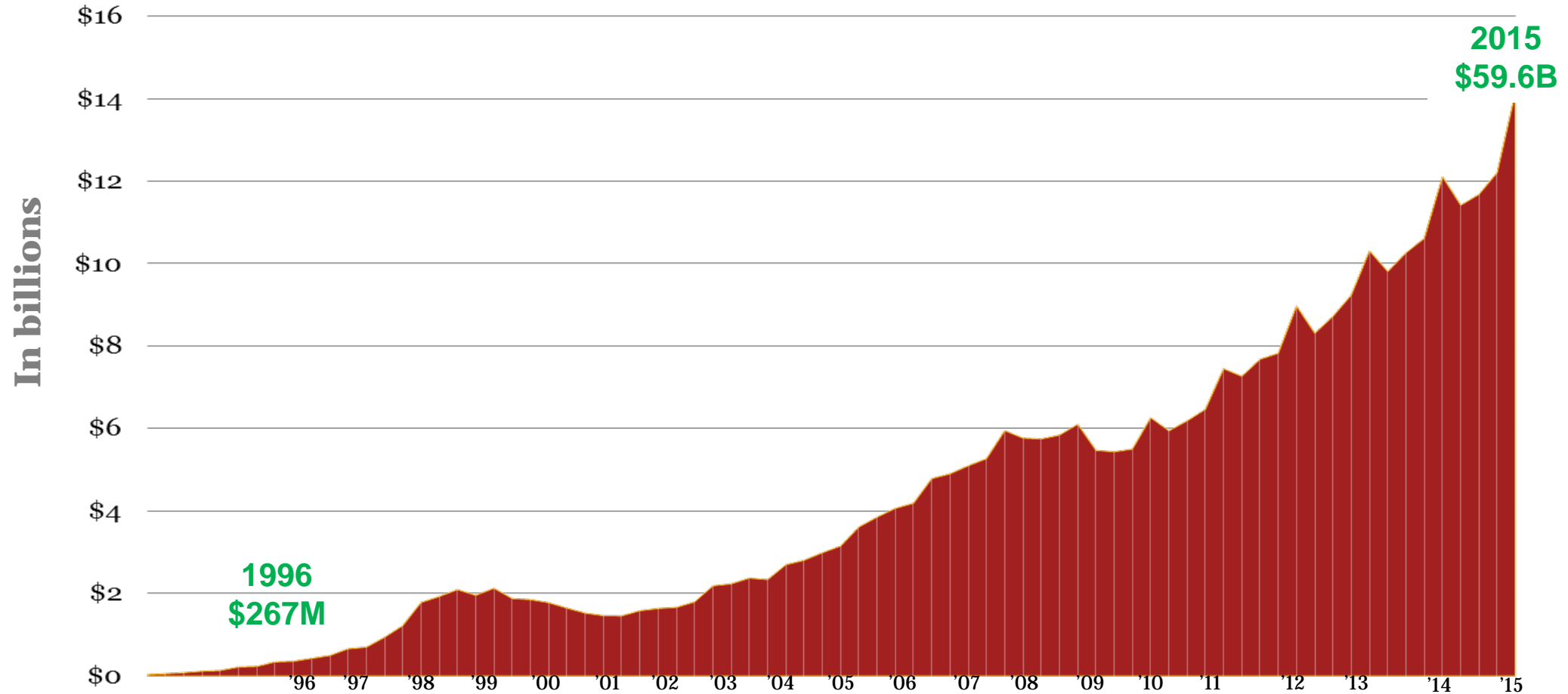


Total Media Ad Revenue Growth (FY 2014 vs. FY 2015)

The Nielsen Company estimates *total* media revenues **decreased** 5% over 2015 to **\$119.8B**

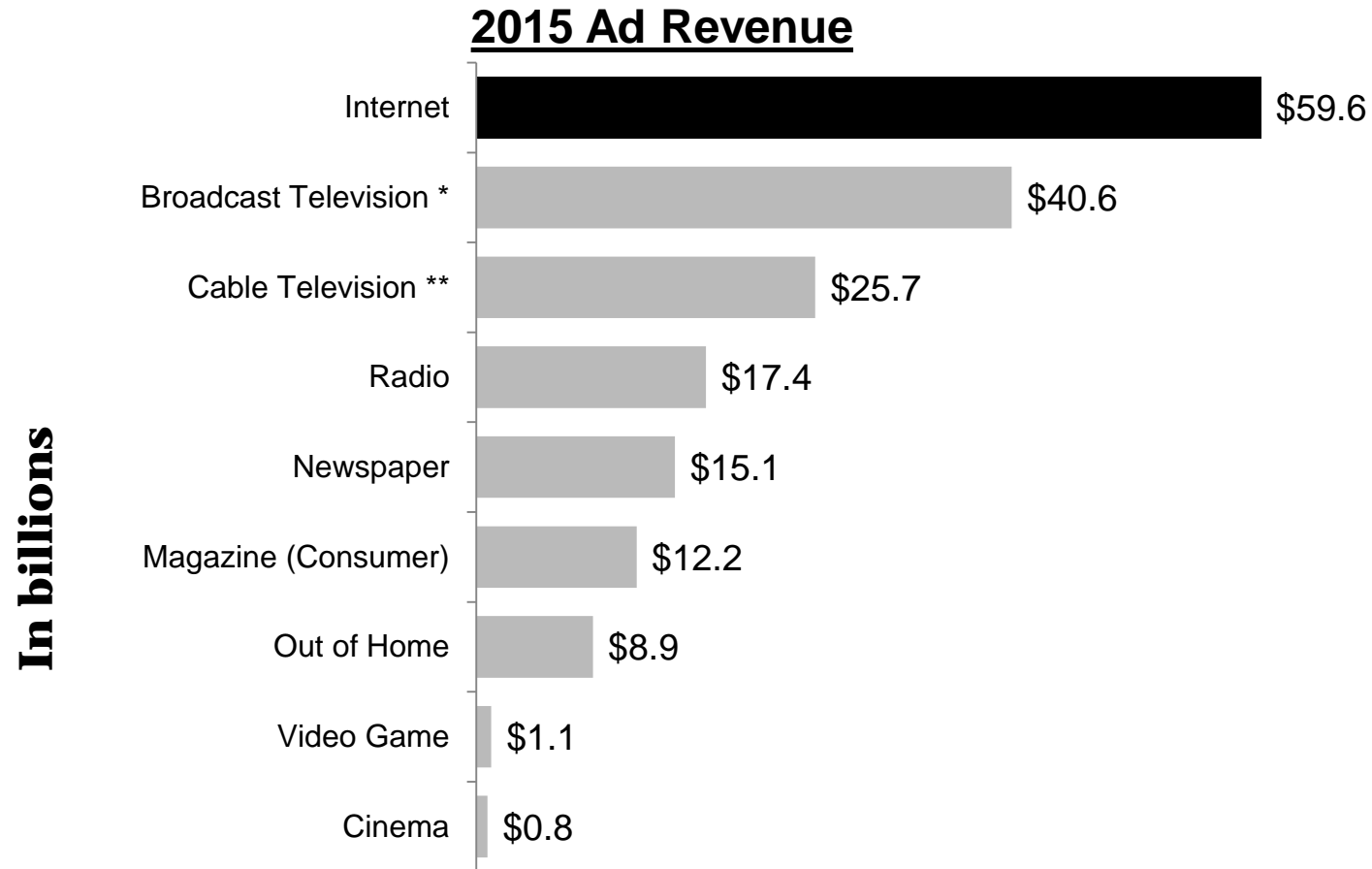
Internet Ad Revenue Shows Strong Growth Over 20 Years

Quarterly Internet Ad Revenue Growth Trends, in Billions 1996–2015



Source: IAB 2015 Full Year and Q4 2015 Internet Advertising Revenue Report

Internet Ad Revenue Outpaces Other Media



Source: IAB 2015 Full Year Internet Advertising Revenue Report

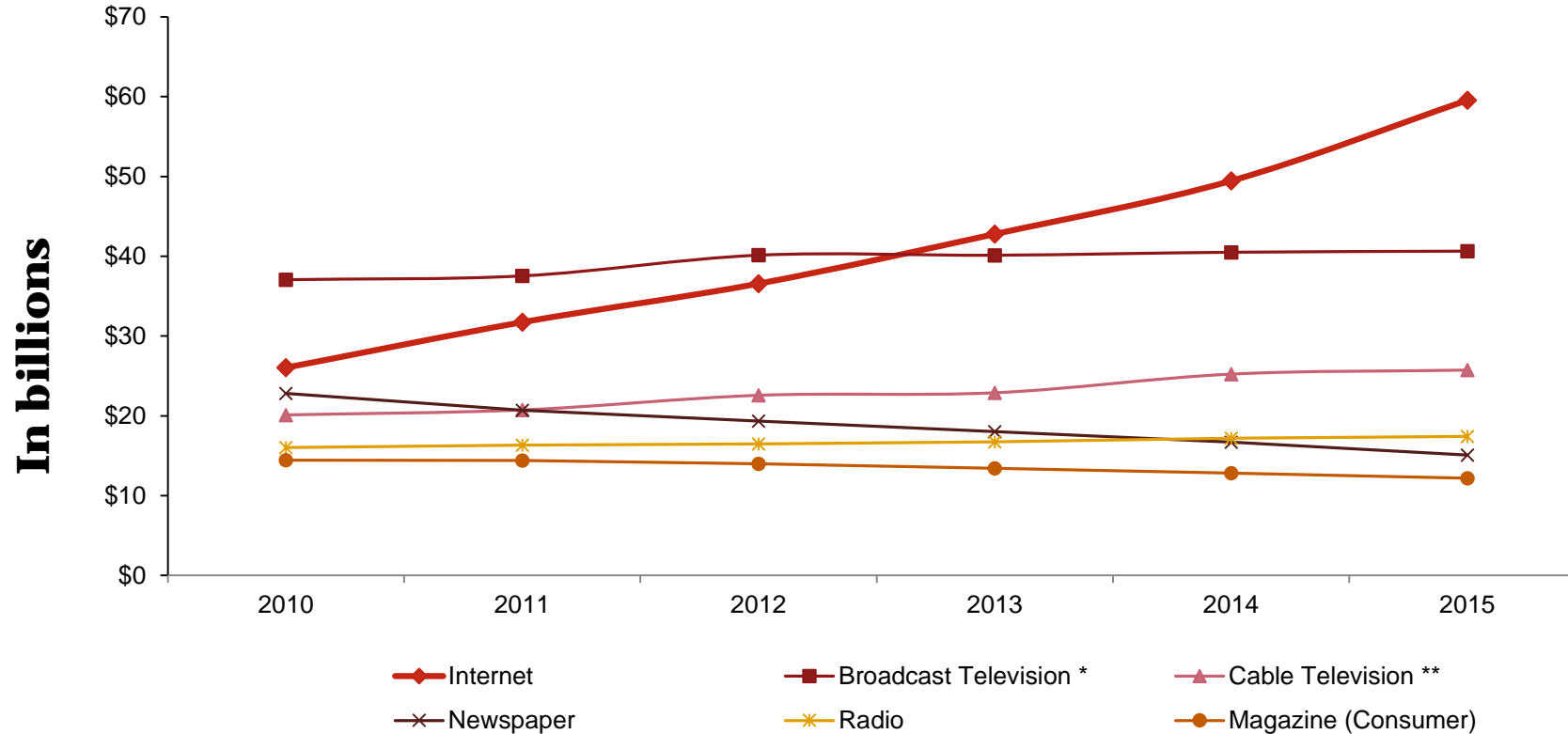
The total U.S. advertising market includes other segments not charted here.

* Broadcast Television includes Network and Syndicated and Spot television advertising revenue.

** Cable Television includes National Cable Networks and Local Cable television advertising revenue.

Internet Advertising Has Overtaken Traditional Media

Advertising Market Share By Major Broadcast Media Type Over The Past Five Years



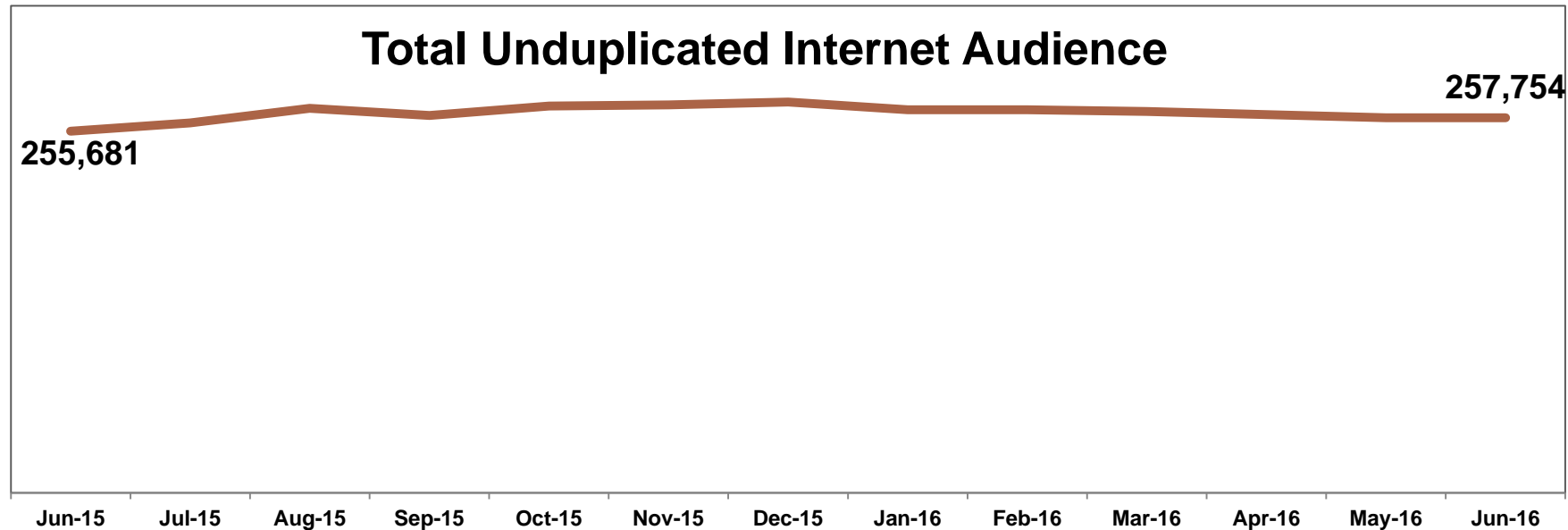
Source: IAB 2015 Full Year Internet Advertising Revenue Report

* Broadcast Television includes Network, Syndicated and Spot television advertising revenue

** Cable Television includes National Cable Networks and Local Cable television advertising revenue. Methodology for Cable TV estimate changed in 2014, impacting results shown in the table above from prior years' Reports.

258 Million Americans (81% of the U.S. population) Accessed the Internet via Computers or Mobile Devices in June 2016

Monthly Unique Visitors (000), June 2015 – June 2016
(of any site or app via computer or mobile device, unduplicated)
Computer and Mobile



% Change
6/15 - 6/16



Sources: IAB 2016 Half Year Digital Usage Trend Report - comScore US Media Metrix Multi-Platform, Jun 2015 to Jun 2016, Total Unduplicated Internet Audience.
U.S. population: 318.9M, US Census Bureau, 2014

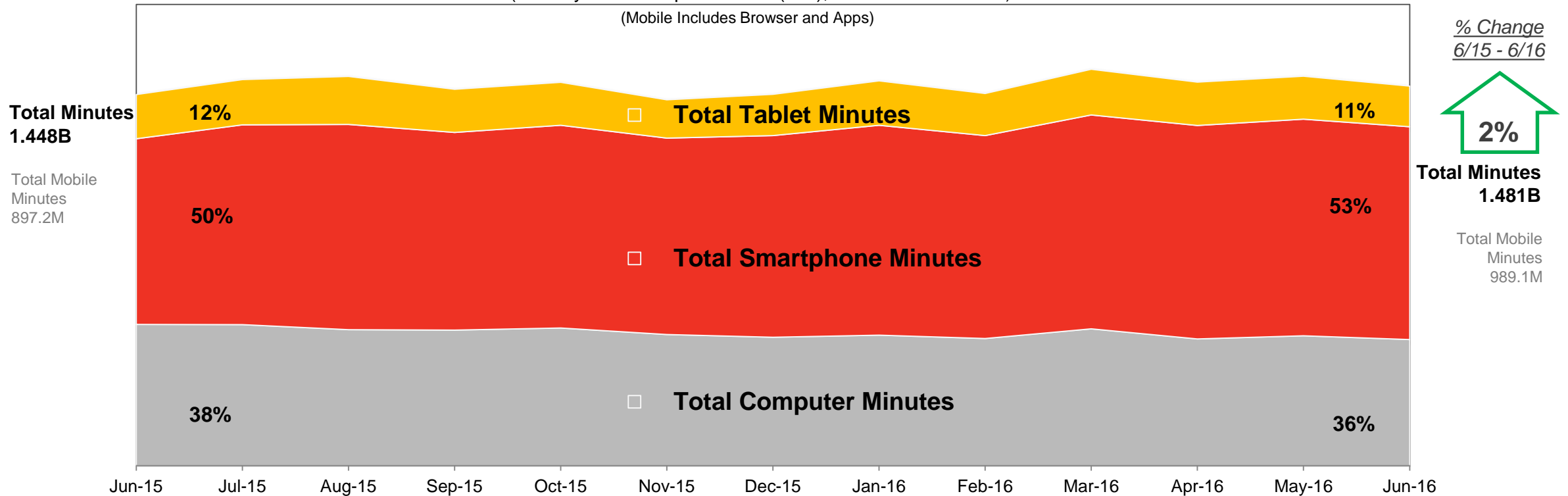
Americans Spent 1.5 Billion Minutes Online in June 2016

Nearly Two-Thirds of That Time is Spent on a Mobile Device

- While users (up 1%) continue to spend more time online overall (up 2%), most of that growth is driven by consumers on smartphones

Total Minutes: Digital and Mobile Audience Trend
 (Monthly Minutes Spent Online (MM), Jun. 2015 – Jun. 2016)

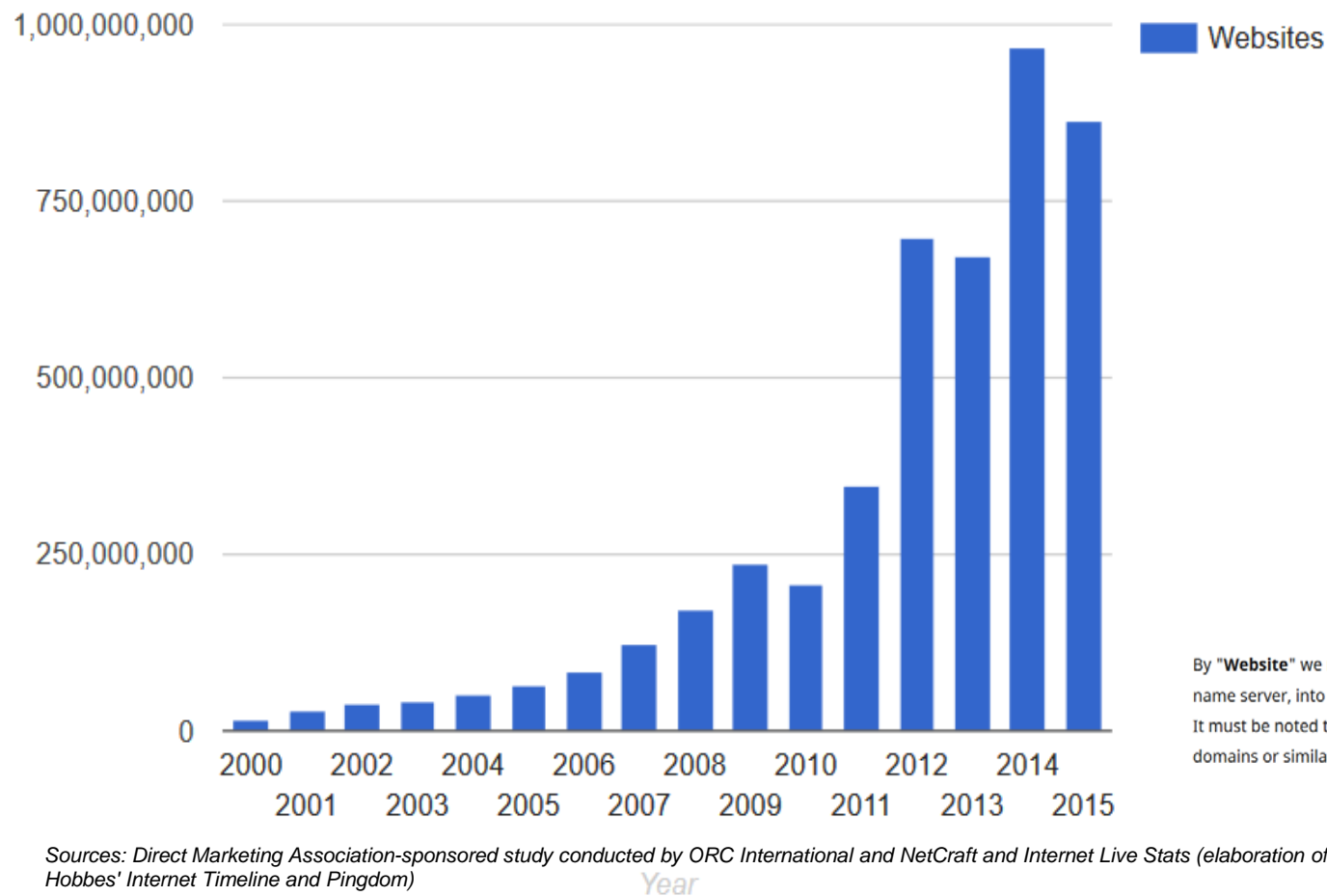
(Mobile Includes Browser and Apps)



Source: IAB 2016 Half Year Digital Usage Trend Report - comScore US Media Metrix Multi-Platform, Jun 2015 – Jun 2016, Total Internet Time Spent (MM)

Nearly 1 Billion Websites Are Available Online Today

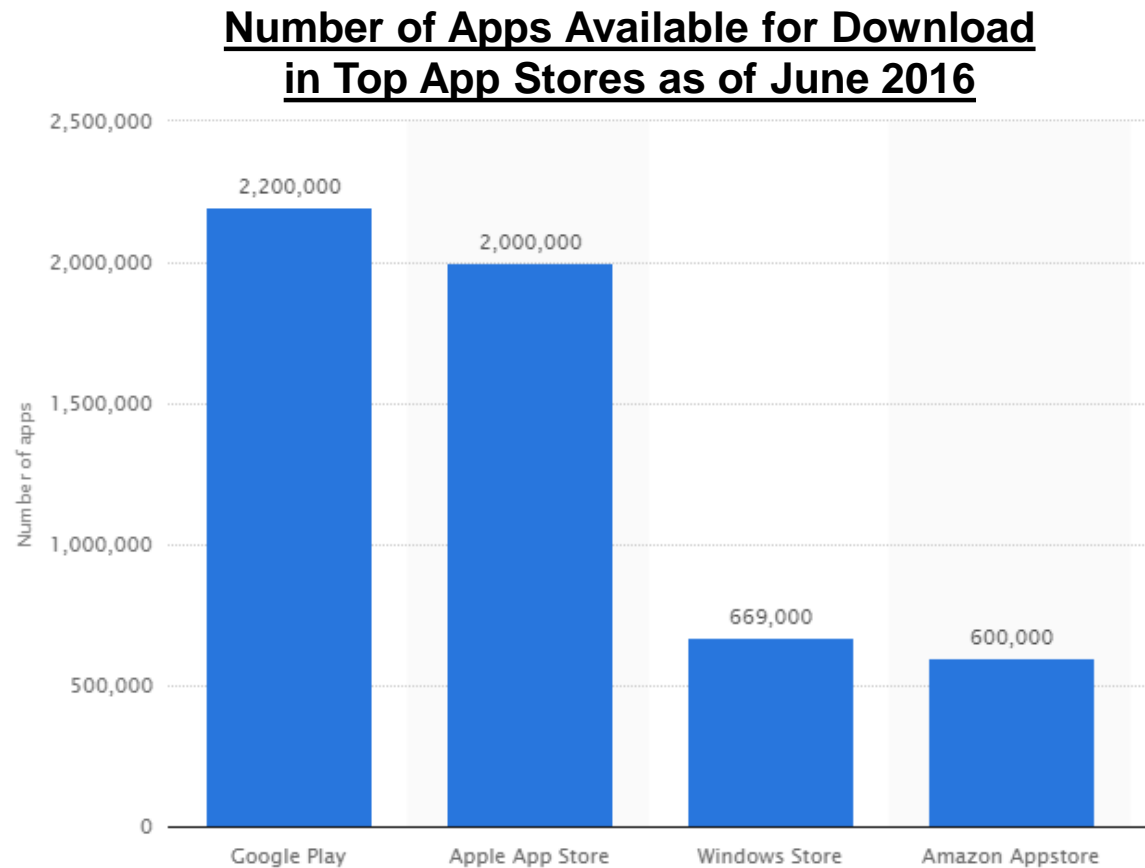
- Most websites are ad-supported and 9 in 10 internet users say they usually visit ad-supported sites
- 7 in 10 Prefer ad-supported sites over fee-based content



Sources: Direct Marketing Association-sponsored study conducted by ORC International and NetCraft and Internet Live Stats (elaboration of data by Matthew Gray of MIT and Hobbes' Internet Timeline and Pingdom)

Over 2 Million Mobile Apps Are Available for Download at Top App Stores as of June 2016

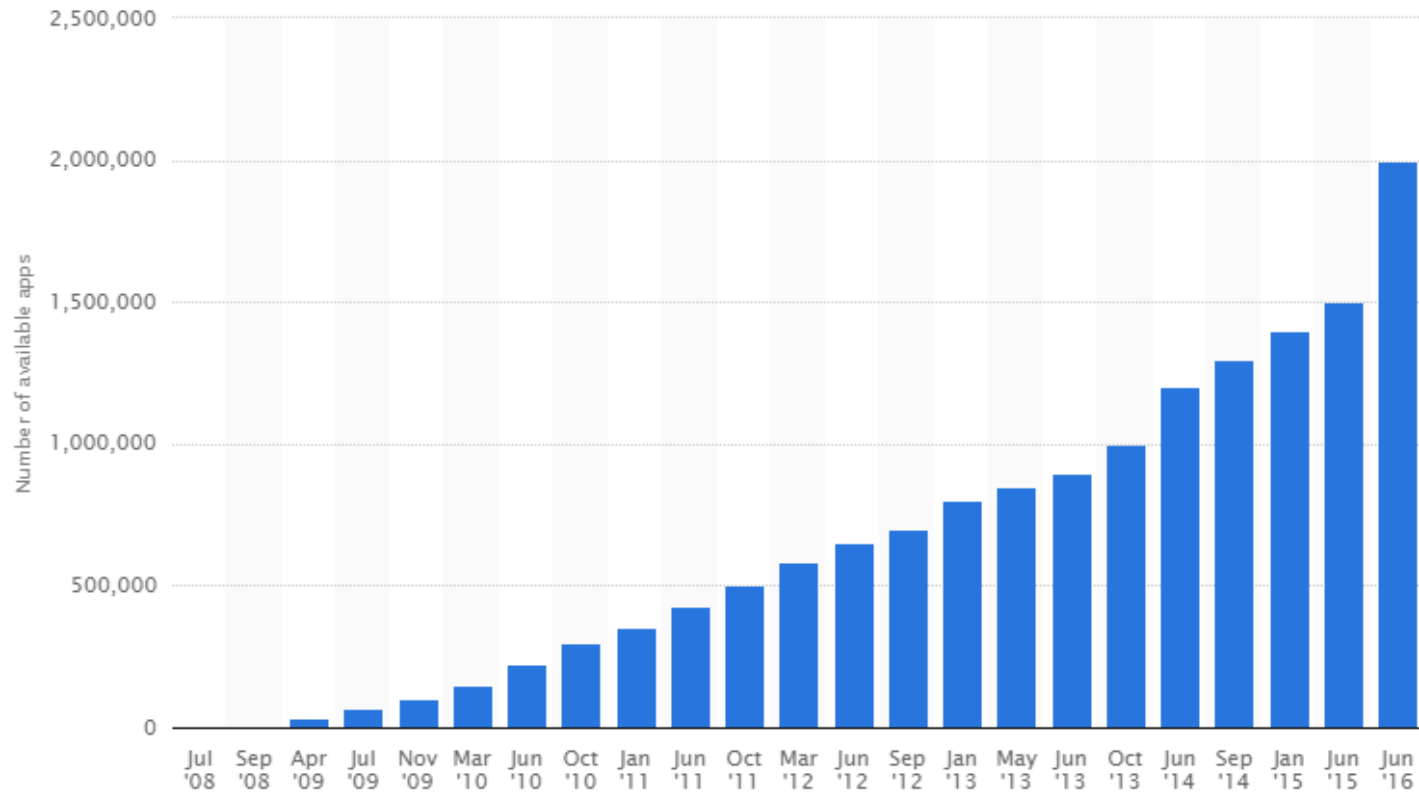
- As of June 2016, Android users were able to choose between 2.2 million apps
- Apple's App Store remained the second-largest app store with 2 million available apps



Source: Statista, Jun 2016

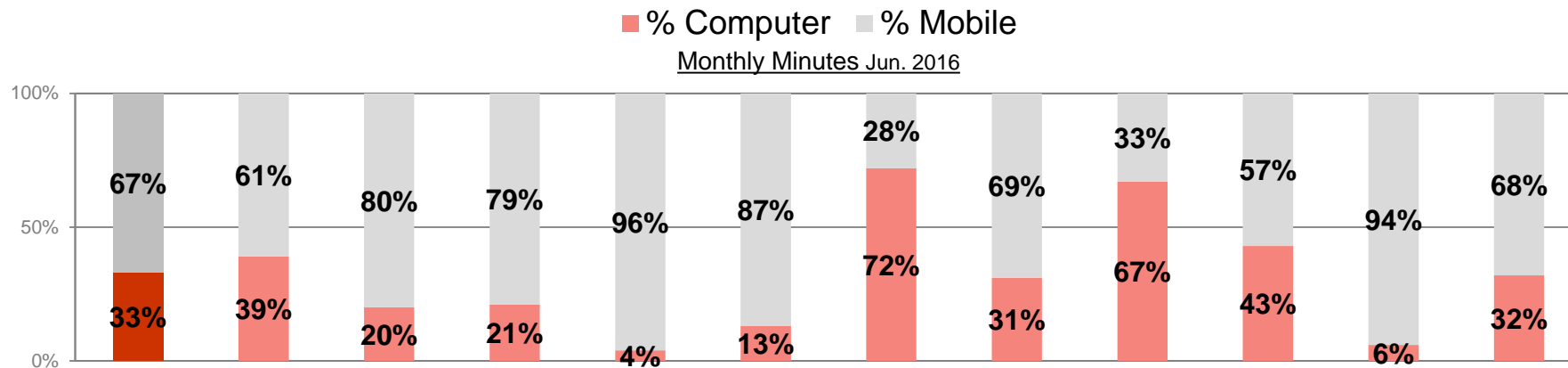
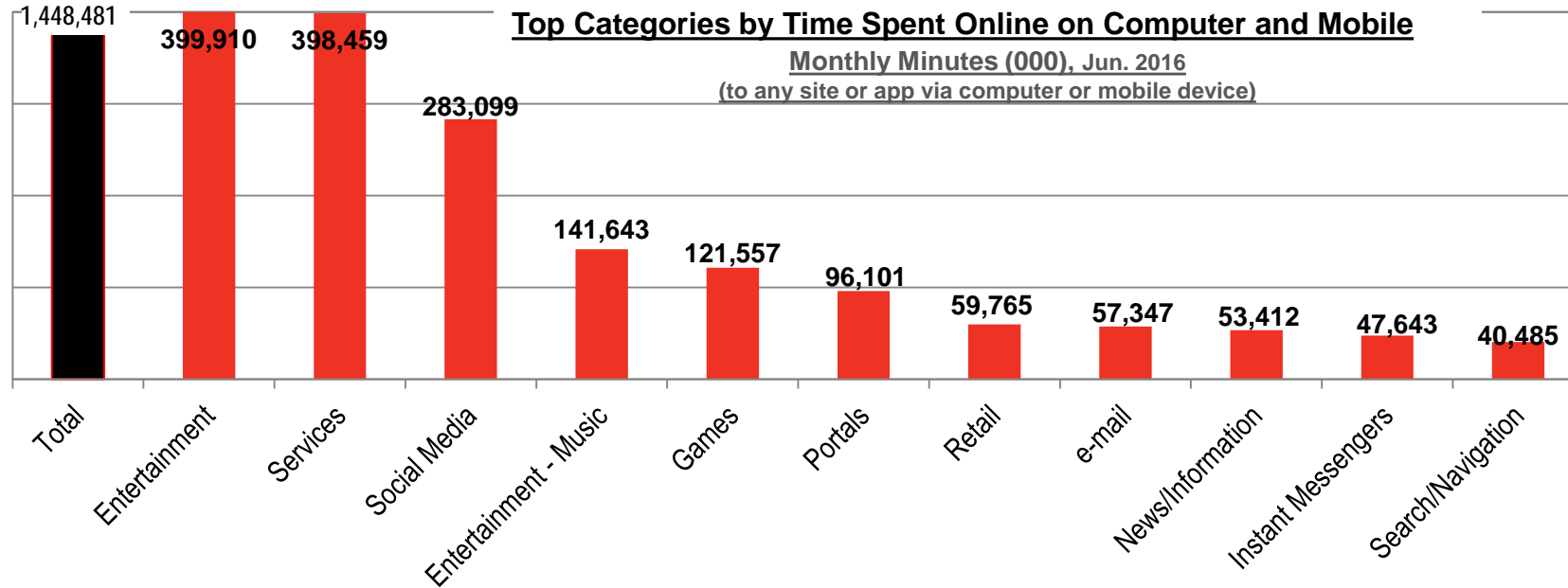
The Number of Available Apps in the Apple App Store Has Grown Steadily Year-over-Year

- As of June 2016, the Apple App Store Offer 33% More Apps Than It Did a Year Ago



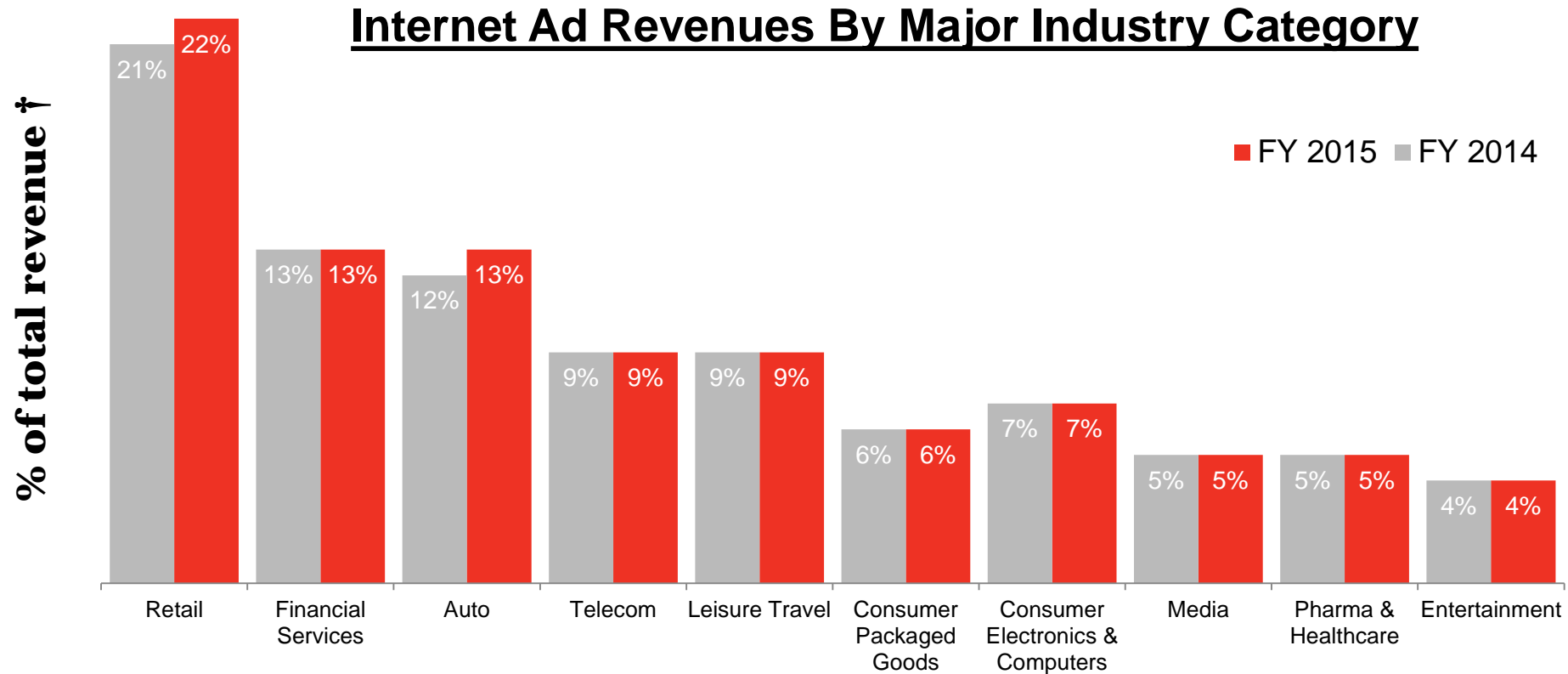
Source: Statista, Jun 2016

Consumers Spend the Most Time Online on Entertainment, Services, and Social Media Sites and Apps Across Devices



Retail Dominates Internet Advertising but All Major Industry Categories Advertise Online

➤ \$49.5B in 2014 vs. \$59.6B in 2015



† Amounts do not total to 100% as minor categories are not displayed.

Source: IAB 2015 Full Year Internet Advertising Revenue Report

The Ad-Supported Internet Ecosystem Employs Upwards of 2 Million Directly and Employs 5 Million Indirectly; Exponential Growth Expected in 2017 Report

- The 2012 IAB and Harvard Business School study, *IAB Economic Value of the Advertising-Supported Internet Ecosystem*, projected employment due to ad-supported Internet ecosystem to be 2 million direct jobs and 3.1 million indirect jobs, for a total employment of 5.1 million people
- The upcoming IAB report on employment statistics from 2011 to 2015 anticipates exponential digital ecosystem employment growth

Growth in Internet Ecosystem by layer, 2007 vs. 2011

Layer	2007 Employment	2011 Employment	% Growth
Infrastructure	140,000	420,000	300%
Infrastructure Support	165,000	254,000	54%
Consumer Support Services	190,000	435,000	229%
Consumer Services	520,000	885,000	70%
Total	1,015,000	1,999,000	197%