



IAB Canada 2017 Actual + 2018 Estimated Canadian Internet Advertising Revenue Survey

DETAILED REPORT

An Industry Survey conducted by EY
Sponsored by the Interactive Advertising Bureau of
Canada

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2017 represented a critical global turning point in the online advertising industry. The world's largest advertisers took note of the implications of digital expenditures exceeding those of any other media. As a result, the industry was challenged to double down on practices designed to improve transparency, eliminate fraud and drive greater value in a brand safe environment.

The industry stepped up by introducing effective tools like IAB Ads.txt to help eliminate fraud, the Open Measurement SDK Kit to help drive consistent measurement and verification across mobile along with several best practice tool kits developed by the IAB Canada Councils.

2017 also saw major developments in the area of Policy and Regulatory Affairs. Health Canada's proposed ban on marketing certain food and beverages to kids led to several presentations on the unintended consequences of such regulation. The IAB also continued to testify to regulators on the strength of our current Privacy legislation indicating that PIPEDA is uniquely built to support industry innovation while respecting the privacy of Canadians through our Opt-Out regime. IAB Canada spent a lot of time with our IAB Europe office to help provide our members with on the ground developments regarding the GDPR.

Amidst all these challenges, we are truly pleased to see continued growth in our industry. This growth is a testament to the power of digital media to connect brands with consumers through powerful creative and innovative technologies. IAB Canada is proud of its active community of over 270 members who are leaning in, with passion and commitment, to drive responsible growth of this dynamic industry.

We look forward to helping drive the Canadian Digital Media industry forward through our continued focus on solutions-based thought leadership.

Sonia Carreno

Sincerely,

Sonia Carreno

President, IAB Canada

A. EXECUTIVE SUMMARY

2017 Full-Year Highlights and 2018 Forecast

Canadian Internet Ad Revenue continued its remarkable, double-digit growth in 2017, rising sharply by 1.3 billion or +23% to \$6.8 billion, 9% over forecast.

For the first time ever, Canadian Digital revenues now exceed the next three measured media combined.

"While Canada's Internet Ad Revenue maintains its rapid year-over-year growth trend, IAB Canada continues to deliver on its commitment to provide the industry with actionable solutions designed to establish and promote a secure supply chain. In 2018, while we continue to drive adoption of industry leading tools to secure the supply chain, we have begun to re-focus our efforts on showcasing the tremendous value digital advertising has to offer."

- Sonia Carreno, President, IAB Canada

The shift to Mobile continues. Mobile, driving the Internet's expansion on an ongoing basis, surged 37% to \$3.5 billion this year, up from \$2.5 billion in 2016, accounting for almost three-quarters of new Internet revenue in 2017.

"With Canadians spending more and more time with digital media, marketers across all industries have come to appreciate that digital media, in all its various forms, is the most effective and cost-efficient way to build brands and achieve direct response goals."

- Jay Aber, President & Founder of The Aber Group Inc.

Video led overall Internet growth in 2017, rising by an unprecedented 93% (+\$447 million) up to \$928 million. 2017 is the first year Video contributed a dollar volume increase as large as either Search or Display.

Up to 2016, the two top formats of Search & Display - due to their sheer historic size, 88% last year - consistently accounted for most of the Internet's absolute dollar volume expansion. In 2017 however, the contributions to dollar revenue growth, were evenly distributed among three formats: Video +\$447 mil; Search +\$444 mil; Display +\$411 mil. Search and Display - up 34% and 10% respectively - collectively represented 84% of total Internet revenue in 2017, down from 88% in 2016 due to Video's steep surge.

"Video is an incredible resource for advertisers in today's digital age. The unprecedented growth in ad



spend demonstrates just how effective it is in reaching and engaging consumers. Year over year we see Canadians appetite for online video grow, and there are no signs of it slowing.”

- Eric Morris, Director, Retail, Google

French language Internet revenue jumped by +27% - much faster than total Canada – more than surpassing the forecasted \$1 billion dollar mark, reaching \$1.147 billion in 2017.

As a result, French language share of Total Canada revenue edged up from 16% to 17% this year, as forecasted. French Language percent revenue growth for Video (+94%) paralleled Video’s overall growth in 2017. Similarly, this impacted French language Search and Display, which despite +34%/+10% growth respectively, saw their combined share of total French revenue erode from 90% to 85% in 2017, due to Video’s surge.

Revenue share concentration among the Top-10 / Top-20 survey respondents, has been gradually edging-up, on average over the past five years.

Top 10/20 concentration sits now at 88% / 92% respectively of all Canadian Internet Ad Revenues in 2017, versus 87%/91% last year. The 5 largest reporting revenue earners generated almost all of the Internet growth in 2017, similar to previous years, demonstrating that the greatest gains are accruing to the largest digital ad sellers.

Total Internet Ad Revenue Projected to rise by over \$945 million to \$7.7 Billion in 2018, up by 14%, with French Canada approaching \$1.3 Billion (+10%).

Cautionary note: This forecast is an aggregate of projections submitted by survey respondents in the 1st and 2nd quarters of 2017. As such, it may be superseded by later marketplace developments.

Of 15 Advertiser Categories reported annually, the top-3 reported industries, consistently in the lead since 2015, are Automotive – 18%, Retail - 16%, and Financial - 14%.

Note that share size sequence among these categories varies by year.

“Continued industry efforts to secure the supply chain and develop a transparent marketplace are critical to the financial services category in order to continue its investment in this dynamic channel. Great progress has been made and we are starting to see the benefits. We look forward to increased activity on this front through IAB Canada and the industry as we look to leverage the tremendous value this channel has to offer.”

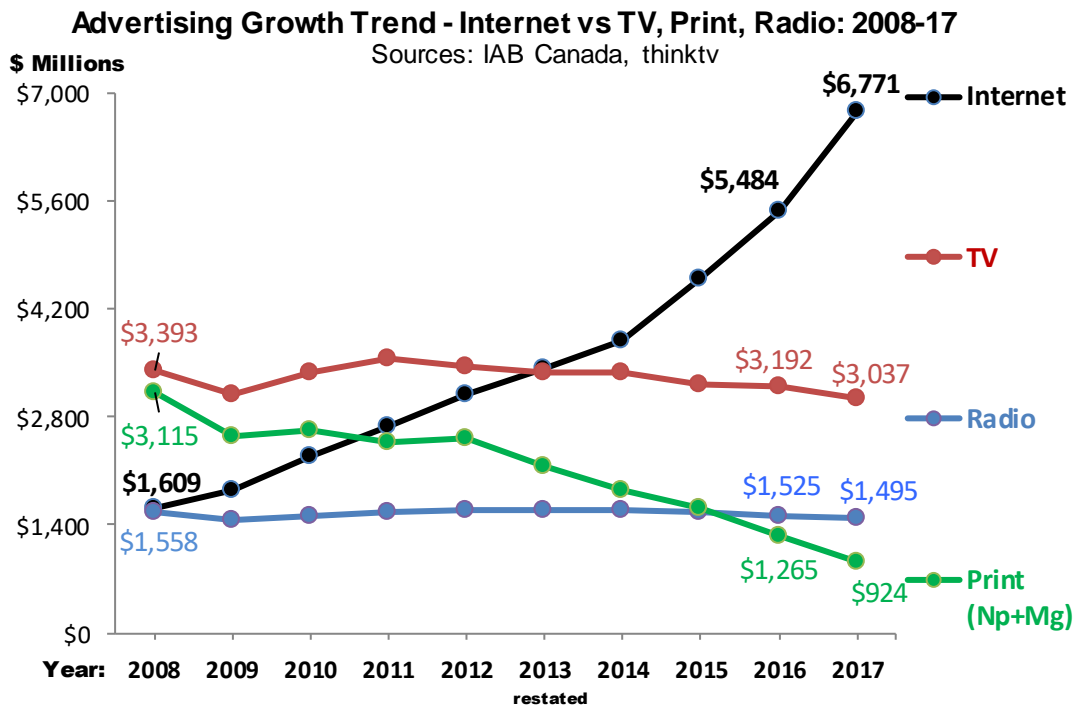
- Monika Federau, SVP & Chief Strategy Officer, Intact Financial Corporation

B. INTERNET ADVERTISING REVENUE FINDINGS - DETAILED

CANADIAN ADVERTISING REVENUES OF TOP-4 CHANNELS: TEN-YEAR TREND 2008-17

Internet continues dramatic double-digit annual growth (+23%),

Digital revenues now exceed the next three measured media combined.



“Digital continues to impact the way all forms of media are consumed. While expenditures indicate a widening gap between traditional mediums, we are confident that the incredible influence of new technologies will begin to reveal itself across all channels in the coming years as audio, and video begin to show some stability. 2017 drove significant advancements in the area of cross-device and cross-screen measurement. These efforts continue well into 2018 and beyond.”

- Sonia Carreno, President, IAB Canada

Mobile continues to drive the Internet’s expansion, surging 37% to \$3.5 billion, accounting for almost three-quarters of new Internet revenue in 2017.

Canadian Internet advertising revenue reached almost \$6.8 billion in 2017, up 23% from 5.5 billion in 2016. This continued the remarkable growth reported in the 2016 survey and represents \$1.3 billion million over last year. The Top-5 reporting revenue earners continued to generate almost all of the Internet growth, reflecting the dominance of leading ad sellers over revenue expansion.

Mobile (including Tablets) drove overall 2017 revenue growth again this year, rising 3-times as quickly as desk/laptop to almost \$3.5 billion revenue, up from \$2.5 billion in 2016.

Total 2017 Internet Advertising Revenue (net)			
Millions (CAN\$)	Actual 2016	Actual 2017	% growth
Online (desk/laptop)	2,942	3,282	12%
Mobile (+Tablet)	2,542	3,489	37%
Total Internet	5,484	6,771	23%

Rounded; Mobile incl Tablets & Msg, excl prod'n;

Mobile’s share of Internet revenues is now more than 1-in-2 advertising dollars (52%), up from 46% in 2016.

Online desktop/laptop, which represented a slight majority of Internet ad revenue at 54% last year, saw its share decline to 48% in 2017, due to slower +12% revenue expansion, relative to the overall Internet (+23%).

Share of Total 2017 Internet Ad Revenue: Online vs Mobile				
Millions (CAN\$)	Actual 2016	% share	Actual 2017	% share
Online (desk/laptop)	2,942	54%	3,282	48%
Mobile (+Tablet)	2,542	46%	3,489	52%
Total Internet	5,484	100%	6,771	100%

Rounded; Mobile incl Tablets & Msg, excl prod'n;



French language Internet revenue surged by +27% - much faster than total Canada - more than surpassing the forecasted \$1 billion dollar mark, reaching \$1.147 billion in 2017. As a result, share of Total Canada revenue edged up from 16% to 17% this year, also as forecasted.

Fluctuations year-to-year in French language share of Internet advertising in Canada may be an artifact of the difficulty some major survey participants have tracking French language ad revenues.

French Canada: 2017 Internet Advertising Revenue				
Millions (CAN\$)	Actual	Actual	%	
	<u>2016</u>	<u>2017</u>	<u>growth</u>	
Total Internet: French	\$900	\$1,147	27%	
Share (Fre/Total)	16%	17%		

Rounded; excl agency com'n; Mobile incl Tablets & Msg, excl prod'n
French PC/Mobile split na (some major earners don't track it).

2018 CANADIAN INTERNET REVENUE FORECAST

Total Internet Ad Revenue Projected to rise by over \$945 million to \$7.7 billion in 2018, up by 14%, with French Canada approaching \$1.3 billion (+10%).

Respondents to IAB Canada's 2017-18 Survey have forecasted that Internet Ad Revenues will grow 14% by the end of 2018, rising to \$7.717 billion in Total Canada. This forecast includes a return to slower growth in French language ad revenues of 10%, projected to increase to \$1.262 Billion, edging its share of Total Canada revenue down 1 point to 16%.

Cautionary note: This forecast is an aggregate of projections submitted by survey respondents in the 1st and 2nd quarters of 2017. As such, it may be superseded by later marketplace developments, that make it more or less certain of being achieved, or surpassed. See previous notation regarding fluctuations in French language share.

"As digital devices and platforms become central to almost every dimension of everyday life for both consumers and businesses, compounded by the technological enhancements within areas like artificial intelligence, market research, ad tech, audio and much more we expect the Canadian industry to continue with positive growth throughout 2018."

- Andrew Saunders, Chief Revenue Officer Globe and Mail, Chairman, IAB Canada

Forecasted 2017 Total INTERNET Ad Revenue (net)			
Millions (CAN\$)	Actual	Forecast	% growth
	<u>2017</u>	<u>2018</u>	
Total Canada	\$6,771	\$7,717	14%
French Canada	\$1,147	\$1,262	10%
Share (Fre/Total)	0.17	0.16	

INTERNET=Online+Mobile; Mobile incl. Tablet+Messaging. Rounded.

TOTAL AND FRENCH LANGUAGE ADVERTISING REVENUES: TEN YEAR TREND 2008-2017

Canadian Internet Advertising Revenues have continued growing at double-digit rates each year over the past decade, despite surpassing a series of revenue milestones like the \$4 billion mark in 2015, the \$5 billion threshold in 2016 and then accelerating as it passed the 6 billion level in 2017.

Online (desk/laptop-only) now accounts for a slight minority of Total Internet ad revenue (48% share), as Mobile (+Tablets) continues its upward momentum (+37% growth). French language revenue has grown at similar rates to Total Canada in past years, but was outpaced between 2014 and 2016, per trending below, then surged ahead of Total Canada in 2017. Note: the latter may be an artifact of the increasing difficulty some major survey participants have tracking French language ad revenues.

TEN YEAR GROWTH Trend of Actual INTERNET Ad Revenues: Online + Mobile 2008-2017 (net)										
	2008	2009	2010	2011	2012	2013*	2014	2015	2016	2017
TOTAL INTERNET	restated									
Total Cana Millions (\$)	\$1,609	\$1,845	\$2,279	\$2,674	\$3,085	\$3,418	\$3,793	\$4,604	\$5,484	\$6,771
% growth/yr	29%	15%	24%	17%	15%	11%	11%	21%	19%	23%
French Cd: Millions (\$)	--	--	--	--	--	650	\$679	\$794	\$900	\$1,147
% growth/yr	--	--	--	--	--	--	4%	17%	13%	27%
DESK/LAPTOP										
Total Cana Millions (\$)	\$1,602	\$1,822	\$2,232	\$2,593	\$2,925	\$2,991	\$2,890	\$2,984	\$2,942	\$3,282
% growth/yr	29%	14%	23%	16%	13%	2%	-3%	3%	-1%	12%
French Cd: Millions (\$)	\$317	\$352	\$428	\$490	\$559	\$578	\$526	na	na	na
% growth/yr	22%	11%	22%	14%	14%	3%	-9%	na	na	na
MOBILE										
Total Cana Millions (\$)	\$7	\$23	\$47	\$81	\$160	\$427	\$903	\$1,620	\$2,542	\$3,489
% growth/yr	182%	248%	105%	74%	97%	167%	111%	79%	57%	37%
French Cd: Millions (\$)	--	--	--	--	--	72	\$153	na	na	na
% growth/yr	--	--	--	--	--	--	113%	na	na	na

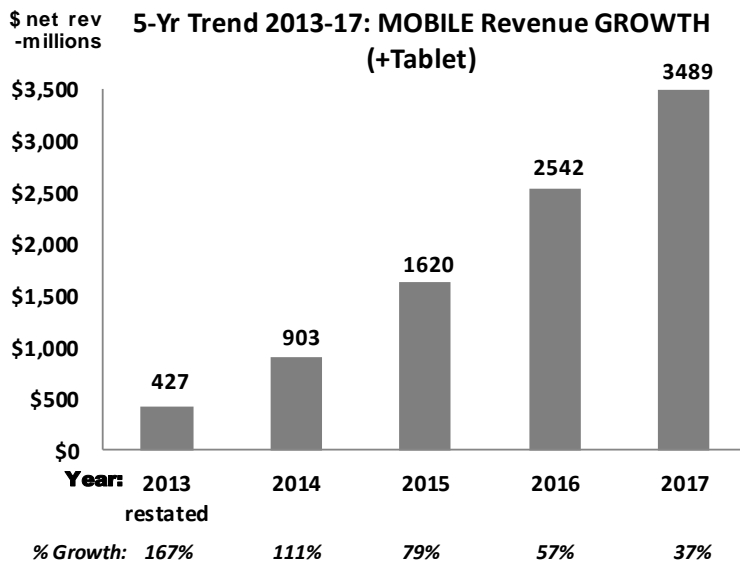
INTERNET = Online + Mobile; Mobile includes Tablets. Revenues exclude agency commission.

French Online/Mobile not reported separately from 2015 on, as some major earners do not track this data/unable to respond.

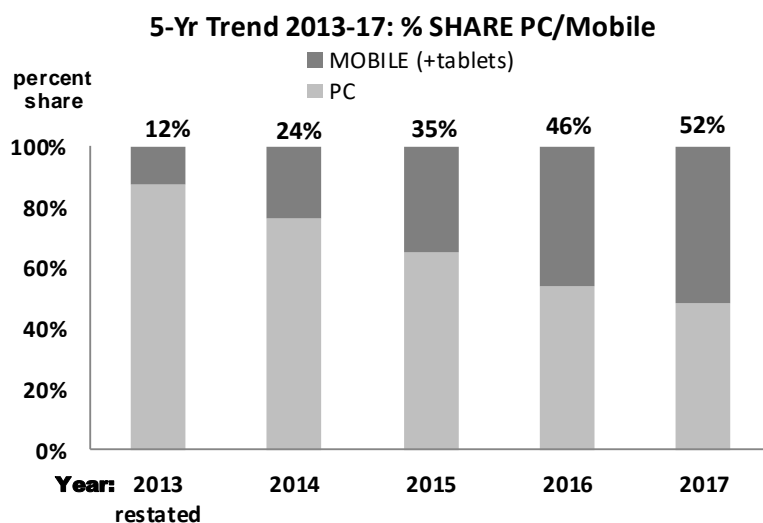
* 2013 restated to reflect 107 million reduction per retroactive advice by a major survey participant.

Growing 3X as fast as desktop/laptop in 2017, Mobile continues to drive the expansion of Canada's Internet advertising revenues.

Ongoing rapid Mobile ad revenue growth is driven by the integral role of smartphones (especially) and less so by tablets in consumers' lives. This is exemplified by the predominance of mobile devices in social media consumption and the migration by users from one screen to another and/or simultaneous multi-screen use, at different times of the day.



The impact of this high annual growth rate is behind Mobile's dramatically rising share of total Canadian Internet ad revenue, as shown below:



CONCENTRATION OF INTERNET ADVERTISING REVENUES AND REVENUE GROWTH BY SIZE OF SURVEY RESPONDENT - REFLECTS DOMINANCE OF LEADING AD SELLERS.

Revenue share concentration has been very gradually edging up over the years, among the Top-10 / Top-20 survey respondents.

The Top 10 Internet Advertising Earners in this survey brought in 88% of all Canadian Internet Ad Revenues in 2017, up 1 point over 2016. The Top 20 Earners now represent 92% of total Internet revenues in 2017, also 1 point up from last year.

Percent Total Revenue - Top 10 / 20 Responses: 2013-17					
year...	2013	2014	2015	2016	2017
	Internet	Internet	Internet	Internet	Internet
Top 10 Responses	82%	83%	86%	87%	88%
Top 20 Responses	89%	90%	90%	91%	92%

Total Actual Annual Internet Revenues 2013-17 (2013 restated)

The 5 largest responses to this survey generate almost all of the growth in Canadian Internet Ad Revenues.

The 5 largest responses to this survey generated 25% annual growth in 2017 Canadian Internet Ad Revenues, compared to 3% growth by the next 15 largest survey participants. A similar pattern is evident in the five-year trending below, 2013-2017.

Annual Percent Revenue Change - 2013-17: Top 5 / Next-15 Responses					
	2013/12	2014/13	2015/14	2016/15	2017/16
Top 20 Survey Responses	% change	% change	% change	% change	% change
- Largest 5 Responses	21%	11%	26%	22%	25%
- Next 15 Largest #6-20	7%	-3%	-2%	1%	3%

Total Actual Annual Internet Revenues 2013-17 versus prior year (2013 restated)

REVENUE AND GROWTH TRENDS BY ADVERTISING VEHICLE/FORMAT

Video led overall Internet growth in 2017, rising by an unprecedented 93% (+\$447 million) up to \$928 million. 2017 is the first year Video contributed a dollar volume increase as large as either Search or Display did.

Up to 2016, Search & Display - due to their sheer historic size - consistently accounted for most of the Internet's absolute dollar volume expansion. In 2017 however, the contributions to dollar revenue growth were evenly distributed among the three formats due to the unmatched +93% growth of Video: Contributions to the 2017 increase were as follows: Video +\$447 mil; Search +\$444 mil; Display +\$411 mil.

The two largest Internet formats of Search and Display collectively represented \$5.686 billion in 2017 - 84% of total Internet revenue - up from 4.831 billion in 2016 (88% of total).

Total INTERNET Revenue & Percent Growth by Ad Vehicle: 2016-2017 (net)						
Ad Vehicles: (CAN\$) (incl Desk/laptop + Mobile)	Total Canada			French Canada		
	2016 (millions)	2017 \$ (millions)	% change	2016 \$ (millions)	2017 \$ (millions)	% change
Search	2,920	3,364	15%	482	531	10%
Display	1,911	2,322	22%	309	414	34%
Classified/Directories	167	145	-13%	17	25	42%
Video*	481	928	93%	91	177	94%
Email	6	12	111%	1	2	72%
Total INTERNET	5,484	6,771	23%	900	1,147	27%

* Video = Pre, Mid, Post-Roll in Videoplayer environment (excludes companion ads or In-Banner);

Video gaming merged Video/Advergaming inside Display (Sponsorship)

Native Content is reported under display

French Language percent revenue growth for Video (+94%) paralleled Video's overall growth for total Canada in 2017.

REVENUE GROWTH BY INTERNET AD VEHICLE/FORMAT: PAST FIVE YEARS 2013-17

For the past five years, Video has grown faster annually than the other formats.

The changes in actual dollars earned by Publishers, Ad Networks and Exchanges/SSPs for Search, Display, Video and other Internet ad formats over time, are shown in the table below.

Five Year Trend of INTERNET Ad Revenue Growth by Ad Vehicle: 2013-2017									
- ALL DEVICES - Ad Vehicles: (CAN\$)	2013*	2014	%	2015	%	2016	%	2017	%
	\$ (millions)	\$ (millions)	change	\$ (millions)	change	\$ (millions)	change	\$ (millions)	change
Search	1802	2052	14%	2512	22%	2920	16%	3364	15%
Display	1091	1274	17%	1554	22%	1911	23%	2322	22%
Classif/Directories**	289	171	-41%	162	-5%	167	3%	145	-13%
Video	208	266	28%	358	35%	481	34%	928	93%
Email	18	19	8%	13	-32%	6	-55%	12	111%
VideoGaming***	11	11	8%	5	-55%	insufficient reportable		merged in Display	
INTERNET (incl Mobile)	3418	3793	11%	4604	21%	5484	19%	6771	23%

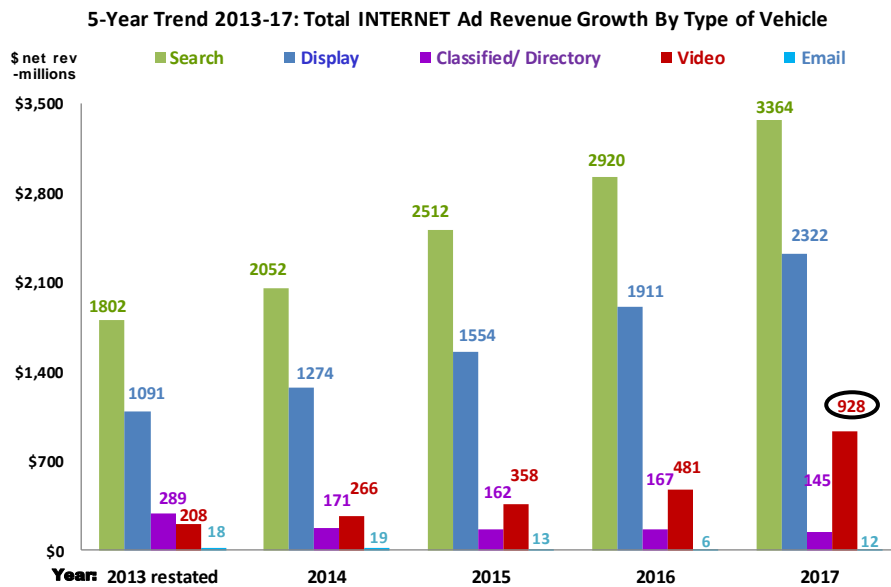
* 2013 Internet total restated by \$107 mil. to reflect retroactive survey respondent change (was \$3,525)

* 2013 standard format revenues projected up from Online-only base (PC) to reflect Internet base (including Mobile + Tablets)

** Class/Dir. decline in 2014 caused by significant \$100million+ reduction in reported revenues by one survey participant

*** NEW for 2017: - Videogaming no longer reported separately, merged into Video+Advergaming within Display (Sponsorship)

The changes in ad revenue by Ad Vehicle over the past five years can also be expressed as a columnar chart, as seen below:



NOTES: Class/Directories: decline in 2014 caused by significant \$100million+ reduction in reported revenues by one survey participant.
As of 2017: Videogaming no longer reported separately, merged into Video+Advergaming within Display (Sponsorship);

SHARE OF TOTAL & FRENCH REVENUE BY VEHICLE/FORMAT: PAST FIVE YEARS 2013-17

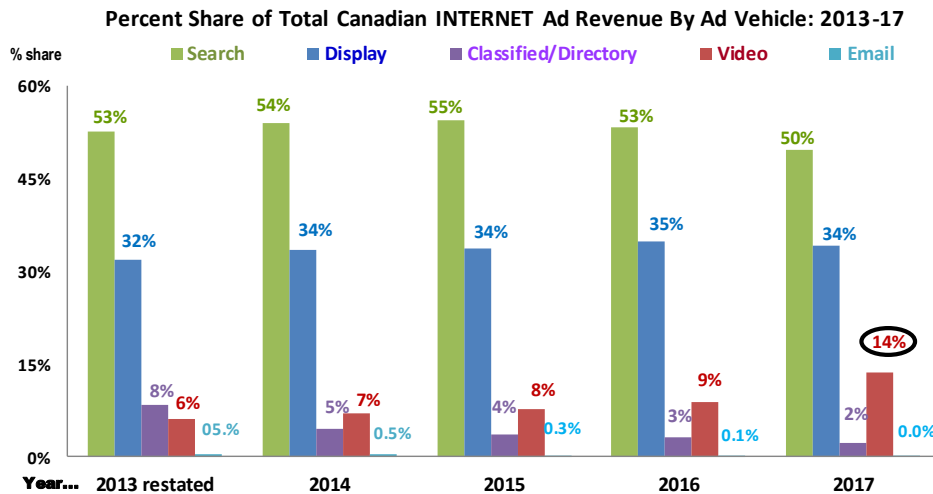
Search & Display shares combined dominated 84% of Total 2017 Internet ad revenue; this combined share was eroded down from 88% in 2016, due to Video’s steep 93% growth in 2017.

The changes in percent shares of Total Internet ad revenues earned by Search, Display, and the other Ad Vehicles (formats) over time are shown below for Total and French Canada.

Share of Total INTERNET Revenue By Advertising Vehicle: 5-year Trend 2013-17										
- ALL DEVICES -	2013*		2014		2015		2016		2017	
Ad Vehicles: (CAN\$)	% TOTAL revenue	% TOTAL revenue	FRENCH % Total rev	% TOTAL revenue	FRENCH % Total rev	% TOTAL revenue	FRENCH % Total rev	% TOTAL revenue	FRENCH % Total rev	
Search	53%	54%	11%	55%	9%	53%	9%	50%	8%	
Display	32%	34%	5%	34%	6%	35%	6%	34%	6%	
Classifieds/ Directories**	8%	5%	1%	4%	0%	3%	0%	2%	0%	
Video	6%	7%	1%	8%	1%	9%	2%	14%	3%	
Email	1%	1%	0%	0%	0%	0%	0%	0%	0%	
VideoGaming***	0%	0%	0%	0%	0%	insufficient reportable		merged in Display		
INTERNET (incl Mobile)	100%	100%	18%	100%	17%	100%	16%	100%	17%	

* 2013 Internet total restated to reflect retroactive survey respondent change
 Note: percentages rounded
 * 2013 standard format revenues projected up from Online-only base (PC) to reflect Internet base (including Mobile + Tablets)
 ** Class/Dir. decline in 2014 caused by significant \$100million+ reduction in reported revenues by one survey participant
 *** **NEW for 2017:** - Videogaming no longer reported separately, merged into Video+Advergaming within Display (Sponsorship)

The change in share of total Internet ad revenue by Ad Vehicle over the past five years can also be expressed as a chart – see below:



NOTES: Class/Directories: decline in 2014 caused by significant \$100million+ reduction in reported revenues by one survey participant.
 As of 2017: Videogaming no longer reported separately, merged into Video+Advergaming within Display (Sponsorship);

MOBILE (+TABLET) AD REVENUES BY FORMAT

A similar pattern is at work in Mobile. Search and Display represented 90% of Mobile revenues in 2016, but Video's steep 123% growth built its share from 9% to 15%, eroding the former's combined share to 85% in 2017.

MOBILE Advertising Revenue by Ad Vehicle: 2015-17 (net)							Revenue
Total Canada							% Chge
Ad Vehicles (CAN\$)	2015 \$ (millions)	% Total Mbl revenue	2016 \$ (millions)	% Total Mbl revenue	2017 \$ (millions)	% Total Mbl revenue	2017/16
Mobile Search	873	54%	1,230	48%	1,770	51%	44%
Mobile Display	631	39%	1065	42%	1175	34%	10%
Mobile Video	106	7%	227	9%	507	15%	123%
Mobile - Other*	10	1%	20	1%	37	1%	84%
Total MOBILE	1,620	100%	2,542	100%	3,489	100%	37%

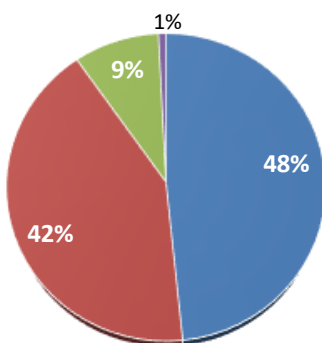
*Mobile-Other = Performance + Messaging;

Rounded to nearest integer.

The change in share of total Mobile ad revenue by Ad Vehicle over the past two years can also be shown as a pie chart:

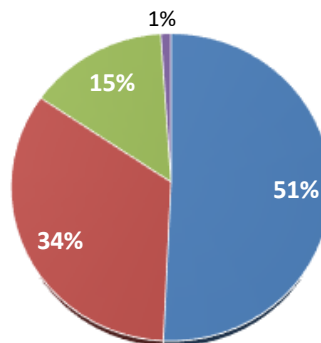
Mobile Percent Share by Format:

2016



Mobile Percent Share by Format:

2017

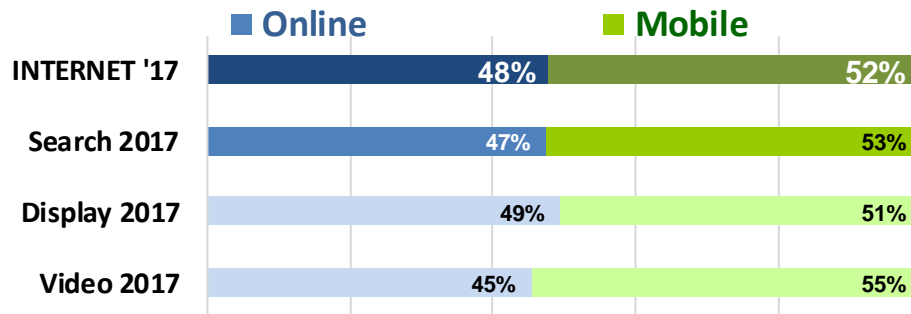


The Ratio of Mobile to Online (desk/laptop) revenues varies only slightly by Ad Vehicle/Format.

Just as Mobile has grown overall to 52% of Total Internet revenue - relative to Online's 48% - the Ratio of Mobile revenues to Online within the individual formats ranges only 1-3 percentage points above or below the average, with Video on the "high side" at 55% and Display below the average at 51%.

Percent Online/Mobile RATIO by Format:

Total Canada - 2017

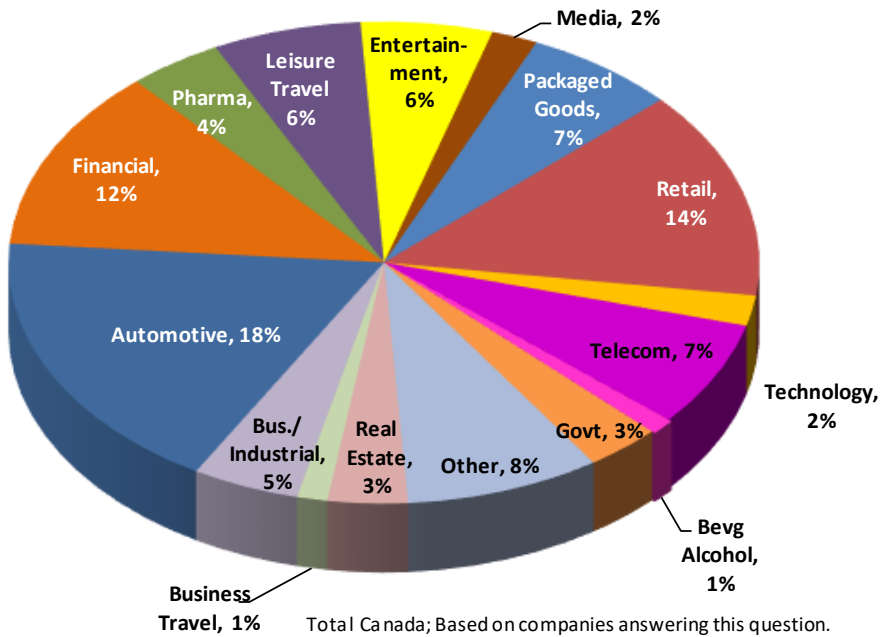


PERCENT OF INTERNET REVENUE BY ADVERTISING CATEGORY: TOTAL CANADA 2016-17

Of 15 Advertiser Categories reported annually, the top-3 reported industries, consistently in the lead since 2015, are Retail, Automotive and Financial (the order varies by year)

In 2017, Automotive leads at 18% of total Internet ad revenue, followed by Retail (14%) and then by Financial (12%). In combination they accounted for almost 45% of Internet ad revenue, based on reporting revenue earners. The percent distribution of total Canadian Internet Advertising Revenue by major product/service category for 2017 is graphically expressed in the following pie chart:

% Canadian INTERNET Ad Revenues by Major Product Category: 2017





C. APPENDIX: BACKGROUND, SURVEY SCOPE AND METHODOLOGY

Background: About IAB Canada's 2017-18 Canadian Internet Advertising Revenue Report

First commissioned in 1998 by the Interactive Advertising Bureau of Canada (IAB), this marks the 20th consecutive year that Canadian Internet Advertising Revenues are being reported.

The results of IAB Canada's Annual Canadian Internet (Online & Mobile) Advertising Revenue Surveys are widely considered the most accurate measurement of Interactive advertising revenues for Canada. The data is compiled directly from information supplied by Publishers who sell advertising on Canadian Websites. Also polled are search, social and video sharing Content Platforms plus Online / Mobile Ad Networks and Exchanges/SSPs that sell advertising on both the Canadian and U.S./other foreign Websites they represent to reach Canadians.

IAB Canada retains EY LLP to oversee the revenue studies. Results of individual respondent submissions are held in strict confidence under EY oversight and are released in aggregate form only.

It should be noted that EY LLP does not formally audit the information supplied by participants in their Survey responses, and provides no opinion with respect to the information submitted.

The technical summary that follows in this appendix contains basic Survey Methodology and the Definitions of the various Online/Mobile Advertising Vehicles (ad formats, programmatic transaction types), and Advertiser product/service categories reported on.

Martin Lundie

Canadian Media and Technology Leader

Ernst & Young LLP



Survey Scope & Methodology

The Canadian Internet Advertising Revenue Report is a big part of IAB Canada's ongoing mission to provide an accurate barometer of Digital advertising growth in Canada.

IAB Canada has retained EY LLP to jointly establish, maintain and continuously update comprehensive Survey standards for measuring the growth of Online and Mobile advertising revenues in Canada.

To achieve and sustain industry-wide acceptance, key aspects of IAB Canada's Annual Canadian Internet Advertising Revenue Surveys include:

- Making the Survey as inclusive as possible, encompassing direct data results from companies engaged in digital media ad sales on the supply-side of the business. These include Canadian Internet Publishers who sell advertising on Canadian Websites. Also included are search, social and video sharing Content Platforms as well as Ad Networks and Exchanges/SSPs who sell advertising on both Canadian and U.S./other foreign websites to reach Canadians. Mobile Aggregators, Mobile Marketing companies and Platforms offering Mobile advertising solutions are also polled.
 - Agencies, Trading Desks and DSPs with no supply-side involvement do NOT participate in this survey. Vendors engaged in both SSP and DSP transactions must only report their SSP-related revenues, NOT their DSP-related revenues.
- Ensuring and maintaining a confidential process, both in terms of methodology, and in terms of releasing only aggregate data; and analyzing historical data from within the Survey, to identify broader trends over time.

Survey Methodology

EY LLP and IAB Canada work jointly, with input from the IAB Revenue Committee to:

- Compile a database of potential revenue earners to survey annually, in relation to Online and Mobile advertising revenues, in both the Total and French Canada markets;
- Conduct an annual quantitative, web-served Survey with the above industry players; note that Publisher surveys previous to 2013 were conducted through the mail (Canada Post)
- Acquire supplemental data through the use of publicly-disclosed information.
- Request and compile several specific data items from digital media vendors
- These include total annual Gross Advertising Revenue (excluding agency commission) and total annual Net Advertising Revenue.

- The Netting-down procedure: Net Revenue is calculated by subtracting the following from the Gross figure: (a) Publisher Revenues derived from Ad Networks and Exchanges/SSPs (b) Ad Network/ Exchange/SSP Revenues derived from other Ad Networks and Exchanges/SSPs, (c) Mobile Carrier fees (as applicable). In other words, media advertising sellers are requested to report net revenues earned only from direct sales transactions between themselves and the advertisers and/or the advertisers' media agencies and/or the latter's Trading desks/DSPs. This is to help ensure no double-counting of ad revenues occurs.
- Annual Net Internet Revenues are requested to be broken down by Advertising Vehicle (i.e. Display, Search, Classified, Video etc) along with a percentage breakdown for each Vehicle based on English and French Canada. Annual Net Mobile (+Tablet) Revenues are also requested separately, to be broken down by Advertising Vehicle and by programmatic transactions. Acceptability for reporting determined by EY.
- Percentage breakdown of Annual Net Revenues is also requested across sixteen (16) different Advertiser product/service categories that sum back to 100% of the Net Revenue reported by respondents answering this question; examples include Automotive, Financial, Technology, etc.
- Identify incomplete responses from actual respondent returns and apply a conservative revenue estimate for missing answers.
- Identify non-participating revenue earners, and apply a conservative revenue estimate for these companies, based on available public sources.
- Report the aggregate findings of the Survey, and report key trends within the Survey responses.

Confidentiality Procedure

All the information submitted by respondents within IAB Canada's annual Canadian Internet Advertising Revenue Surveys is completely confidential, due to the "double-blind" data collection methodology that is rigorously employed by IAB Canada and EY LLP.

IAB Canada's role:

- Identify industry participants who sell Internet advertising;
- Assign a unique, non-identifying, anonymous, alpha-numeric code to potential Survey participants;
- Send out Survey invitations by email to these potential participants, including (i) a non-

traceable generic link to access the survey and (ii) a confidential anonymous code that is unique to each media seller, in order to log-in to the survey.

- Report on the results of the Survey, as tabulated and reported in aggregate by EY LLP or external financial accounting resources under its direction.

Double-Blind Methodology

- Internet Publishers/Ad Networks/Exchanges-SSPs/Mobile aggregators etc to be surveyed are derived from IAB Canada Member lists, from comScore's AdFocus list (a list of Web properties selling digital advertising in Canada) and from members of the IAB Revenue Methodology Committee.
- Each Internet Publisher/Ad Network/Exchange-SSP/Mobile aggregator etc selected for surveying is assigned a unique alpha- numeric code that only the IAB Canada President and Research Director are aware of, and sent a Survey invitation by email, containing a non-traceable generic link to the survey and unique alpha-numeric codes for each participant to log-in.
- Once completed by a respondent, the secure online survey platform automatically sends notification of this to EY LLP and IAB Canada (no data). The data from each completed survey is aggregated in the online survey system database, with access restricted to Martin Lundie of EY or an external financial accounting resource under his direction.
- Once all the Surveys are in, the responses are averaged and extrapolated by segment to the total Canadian Internet advertising market. NOTE: Respondent data cannot be traced back to its origin within the survey platform.
- Aggregated Canadian market totals are sent to the IAB Canada President and Research Director for verification, and then presented to the IAB Canada Board for final approval. The IAB Board confirms that the Survey methodology is sound and the tabulations are correct, and votes to approve the publication of the Revenue Survey numbers.
- Report detailing final Survey actuals and respondents' estimated next year's Canadian Internet Advertising Revenues (for both English and French markets) is created. The Report also includes estimates of percent revenues by Advertising Vehicle (i.e. Display, Search, Mobile, Video, Classifieds, etc.), device (Online vs Mobile) and by Advertiser Category (Automotive, Financial, Technology, etc.).



Industry Survey and Report Guidance Provided to IAB Canada

Internet Revenue Methodology Committee

This specially-convened annual member committee, representing a cross-section of Canada's leading Internet ad revenue earners (as defined earlier in this document), as well as selected ad agencies with trading desks, was created to recommend and oversee updates to IAB Canada's Annual Canadian Internet Advertising Revenue Survey distribution lists and questionnaire design, when/as needed, in response to changing conditions within the Canadian Internet advertising marketplace.

Contents of following Section: Detailed Definitions of Advertising Vehicles (Formats) and Advertiser Categories: 2017-18

Section A: 2017-18 Definitions of Internet Advertising Vehicles (Formats)

Section B: 2017-18 Definitions of Mobile (+Tablet) Advertising Vehicles (Formats)

Section C: 2017-18 Definitions of Leading Industry Categories

D. APPENDIX: DETAILED DEFINITIONS

SECTION A – Definitions of INTERNET Advertising Vehicles/Formats: 2017-18

Includes revenue from ALL Devices: i.e. Desktop/laptop Computer, Mobile, Tablets & Other Connected Devices - EXCLUDES Production, eCommerce

Introduction:

This survey is meant only for companies involved in the SELLING/supply-side of the Internet media advertising space business. For details refer to page 1.

What We Mean By “NET Revenue”:

To ensure there is NO duplication of reported ad revenues between Publishers, Ad Networks or Exchanges/SSPs (SSP = supply-side platforms), ONLY report revenues that you earned from DIRECT SALES of your own advertising inventory or inventory you sold on behalf of a 3rd party. These consist of DIRECT TRANSACTIONS between your company and the ADVERTISERS themselves and/or their Media AGENCIES and/or their TRADING DESKS/DSPs. REPORT 100% of any DIRECT SALES revenue you earn. Do NOT subtract the cost-of-sale; i.e. revenues you paid back to an original (3rd party) vendor for selling their inventory”. (Contact Steve Rosenblum, Research, with questions: srosenblum@iabcanada.com).

The INTERNET Advertising Formats:

Standard/Rich Media Display Advertising (CPM, CPE* only) –

Advertiser pays an Internet Publisher or Ad Network/Exchange for space to display the following:

(a) STANDARD - hyper linked text, banner, big-box, skyscraper, button, or other basic unit (can animate, contain Flash or utilize HTML5), on one or more of the Publishers’ Web pages.

(b) Revised!! RICH MEDIA - hyper linked banner, bigbox, skyscraper, expanding or floating ad, etc., that contains user interaction functionality of various types allowing interaction with products or services (including the ability to fill out forms, play games, expandable mouse-over areas for more info, clicking within the ad for a “virtual test-drive” etc.) and/or Video or XML ad content (e.g. In-Banner Video executions), as opposed to solely animation. All IAB Rising Stars ad formats are considered Rich Media; so are Interstitials (i.e. full/partial-page server-push ads appearing in the transition between two pages of content) or overlays (appearing over top of the page). Digital audio ads that appear before, during or after streaming audio content, as well as video ads unaccompanied by other video content (i.e. Out-stream – in the page feed, not in videoplayer) are also considered rich media.

* Note: CPE = Cost per Engagement

Not included: Video Pre, Mid, Post-roll etc (i.e. In-Stream Video) in a Video-player environment should be entered in the Digital In-Stream Video section - NOT Rich Media.

Revised Sponsorship / Contest / Advertorial / Advergaming Advertising (Flat Fee) –

An Advertiser sponsors part or all of a targeted Internet Publisher Website, usually existing content (e.g., entire Website, site area, an event, etc.). Sponsorships may contain a Display advertising component (e.g. banners, pre-roll, etc), but are usually negotiated on a flat fee basis.

Contests/Advertorials are custom branded sponsorships created for the Advertiser, and often contain listing fees, as well as net contest/microsite creation revenue. Advergaming can range from an advertiser buying all the ad units around a game or a “sponsored by” link, to creating a custom branded game experience.

Direct Response / Lead Generation Performance Advertising (CPC, CPA*, CPLed only) –

Fees Advertisers pay to Internet Publishers that refer qualified purchase inquiries/potential customers (e.g., auto dealers which pay a fee in exchange for receiving a qualified purchase inquiry over the Internet) or provide consumer information (demographic, contact, behavioral), where the consumer opts into being contacted by a marketer (email, postal, telephone, fax). These processes are priced on a performance basis (e.g., cost-per-action, cost-per-lead or cost-per-inquiry), and can include user applications for service (e.g., applying for credit card, mortgage or insurance), surveys, contests or registrations.

* Note: CPA = Cost per action/acquisition

NOTE - In final report: Display = Standard/Rich Media Display, Sponsorship + Direct Response (sum of all the above).

Digital In-Stream Video Advertising (CPM, CPV, CPCV* only) –

Pre-, Mid-, Post-Roll TV-like advertisements that may appear as Video commercials or before, during, and/or after a variety of streaming video content or on a Standalone basis, in an actual Video-player environment ONLY, including but not limited to streaming Video, animation, gaming, and music Video content. Video overlays contained within the video-player are also categorized as digital video ads. This definition includes Digital ~~In~~stream Video commercials that appear in live, archived and downloadable / streaming content.

Video overlays include small ads that appear on top of digital video content. They can appear to be display, video, rich media, text or another ad format but are contained within the video player.

NOTE: DO NOT include companion ad revenue or In-Banner ad revenue, unless your Digital Video package is sold in such a way that you cannot separate the revenue (i.e. please DO NOT record companion ad revenue in both Video & Display). DO NOT include revenue from Video within in-banner executions (i.e. not in a player) in this category, as it is covered in the Standard/Rich Media Display Advertising section above.

* Note: CPV = Cost per View / CPCV = Cost per Completed View

New Streaming Digital AUDIO Advertising – expanded description, see Rich Media inclusions.

Refers to partially or entirely advertising-supported audio programming available to consumers on a streaming basis, delivered via the wired and mobile Internet. This includes advertising served in a wide range of services, such as the following:

- Online audio streams of terrestrial radio stations;
- Purely online radio stations, with either professional or amateur DJs;
- Personalized (i.e., without human editors/DJs) and on-demand, streamed audio services that create playlists based on user preferences of artists, tracks, or genres;
- Music or spoken word audio content delivered within a different website or application, e.g., in-game music services, podcast.

Search Advertising

Fees advertisers pay Internet Publishers to list and/or link their company site/domain name to a specific search word or phrase via paid listings or contextual search.

Search categories include:

- *Paid listings* – Text links appear at the top, bottom or side of search engine’s results for specific keywords. The more a marketer pays, the higher the position it gets. Marketers only pay when a user clicks on the text link.
- *Contextual search* – Text and image ads appear in an article on a Publisher’s site, based on the context of the content. Marketers only pay when the link is clicked.

Note: EXCLUDES SEO (search engine optimization) techniques, that can be used to make a website ‘search engine friendly’, in order to improve the site’s ranking in search engine results pages (SERPs).

E-mail

Banner ads, links or advertiser sponsorships that appear in Internet Publisher’s e-mail newsletters, e-



mail marketing campaigns and other commercial e-mail communications. Includes all types of electronic mail (e.g., basic text or HTML-enabled).

Classifieds / Auctions

Revenues that Internet Publishers receive to list specific advertiser products or services (e.g. Internet job boards and employment listings, real estate listings, automotive listings, personals listings, business to business, auction-based listings and merchandise). NOTE: please DO NOT include e-commerce revenue.

Directories

Revenues that Internet Publishers receive to list specific advertiser products or services on city sites, yellow or white pages, etc.

NOTE - In final report: Classifieds / Directories = Classifieds / Auctions + Directories (summe



SECTION B - Definitions of MOBILE Platform Ad Vehicles/Formats: 2017-18

NOTE – INCLUDES Mobile + Tablets; EXCLUDES Computers (desk/laptop) or Other Connected Devices - EXCLUDES any Production or eCommerce

Introduction: This survey is meant only for companies involved in the SELLING/supply-side of the Internet media advertising space business. For details refer to page 1.

Definition of Mobile:

Advertising tailored to and delivered through wireless mobile devices such as smartphones (e.g. iPhone, Android, Blackberry), feature phones (i.e.. lower-end mobile phones capable of accessing mobile content), and tablets (e.g. iPad, Samsung Galaxy Tab). Typically taking the form of static or rich media display ads, text messaging ads, search ads, or audio/video spots, such advertising generally appears within mobile websites (i.e. websites optimized for viewing on mobile devices), *adaptive or responsive sites* (i.e. which adjust correctly to fit the screen of the device it's being served on), mobile apps (i.e. applications for Smartphones or Tablet devices running iOS, Android, Windows Mobile or other operating systems), text messaging services (i.e. SMS, MMS) or within mobile search results (i.e., 416 listings, directories, mobile-optimized search engines).

What we mean by “NET’ Revenues”:

To ensure there is NO duplication of reported revenues, ONLY report Mobile (+Tablet) ad revenues that you earned from DIRECT SALES of your own advertising inventory or inventory you sold on behalf of a 3rd party; i.e. ACTUAL Insertion Orders issued DIRECTLY to your company by the ADVERTISERS themselves and/or their Media AGENCIES, and/or their Trading Desks / DSPs. Report 100% of any DIRECT SALES revenue you earn. Do NOT subtract the cost-of-sale; i.e. revenues you paid back to an original (3rd party) vendor for selling their inventory”. (Contact Steve Rosenblum, Research Director with any questions, srosenblum@iabcanada.com).

The 4 FORMATS that make-up the Mobile (+Tablet) Advertising Platform:

Mobile Platform Spend By Format = Mobile Display/Sponsorship + Mobile Search + Mobile Video + Mobile Other (i.e. Mobile Messaging + Mobile Performance)

Mobile advertising formats include: 'Display/Sponsorship' (banner ads, digital audio,



sponsorships, and rich media), 'Search', 'Video' and 'Other' advertising served to mobile and tablet devices. Mobile revenues include Tablets; Tablet revenues include all advertising served on Tablet devices, including Apps & Websites. Production excluded.

1) Mobile DISPLAY/SPONSORSHIP Advertising Revenue (Standard/Rich Media; Sponsored App, Game, "Push" e.g. location-based etc) – CPM/Flat fee only

Mobile Display/Sponsorship advertising consists of advertising served specifically to mobile devices on Mobile Optimized sites (e.g. m., .mobi, /mobile), Responsive sites or within Mobile Applications (such as on News and Weather or within Mobile Games). Please EXCLUDE Production Revenues for the development of Mobile Content or Mobile-only/Tablet-only Applications, if any.

Here we include all revenues received for:

- Standard Display ads (Banners; Interstitial or Full-page ads; Mobile Flyers; etc.);
- Sponsorship ads (this includes Sponsored "push" notifications e.g. date, contextual or location-based notifications; Sponsored Apps, Games, etc. "brought to you by...").
- Revised - Rich-media ads (i.e. expandables, take-overs etc., and/or in-banner video executions, as opposed to solely animation). Display-related ads on a page (that are not in a player) which contain video are considered Rich Media Ads. Digital audio is also included.

For a full description of Standard Display, Rich Media, Sponsorship and Audio, see Section A.

Included in Mobile Display/Sponsorship Revenue: CPM/Flat Fee revenues only

Not Included: In-Stream Video Advertising in a video-player environment (pre, mid, post-roll, which are considered Digital Video Ads, NOT Rich Media. Mark-up by ad Agencies (gross); Ad creation/production revenues; End-user data charges.

2) Mobile SEARCH Advertising Revenue

In this category, include all revenues received for Paid Search advertising directed specifically at Mobile devices. See Section A for details.

Not Included: Mark-up by ad Agencies (gross); Search Ad creation/production revenues; Search



Engine Optimization (SEO) revenues.

3) Mobile IN-STREAM VIDEO Advertising Revenue (Pre/Mid/Post-roll etc) – CPM/CPV/CPCV-only

Mobile Video advertising consists of Video Pre/Mid/Post-roll and Standalone video commercials in a video-player environment, served specifically to mobile devices on Mobile Optimized sites, Responsive sites or within Mobile Applications.

Video Overlays are also categorized as Digital Video Ads. Video overlays include small ads that appear on top of digital video content. They can appear to be display, video, rich media, text or another ad format but are contained within the video player.

Not Included: Mark-up by ad Agencies (gross); Video creation/production revenues; End-user data charges; Companion ad revenue or In-Banner ad revenue, unless your Digital Video package is sold in such a way that you cannot separate the revenue (i.e. please DO NOT record companion ad revenue in both Video & Display); Video revenue from within in-banner executions (i.e. not in a player), which are considered Rich Media.

4) Mobile OTHER Advertising Revenue: Messaging, Performance

A. Mobile MESSAGING (SMS, MMS, Bluetooth, IVR) Advertising Revenue

Revenue generated from Mobile advertising/marketing campaigns that promote a product or service via Messaging delivered to and from short-codes/long-codes. This encompasses standard, zero-rated and premium-rated Messaging. When counting revenue for Mobile Messaging campaigns, the goal is to calculate the total amount of money that the brand is spending on the Mobile Messaging campaign, which could include premium Messaging revenue from consumers that is used to offset these costs.

Included in Mobile Messaging Revenue: Campaign set-up and operating fees; Short code fees; Transactional fees charged to the brand (Message, hosting and maintenance) or to consumers (premium end-user Message fees).

Not Included: Mark-up by ad Agencies (gross); Mobile Messaging production revenues; Contest prizing or redemption charges; Mobile Content (e.g. Ringtones, Wallpapers, etc.).

Note: For Carriers completing the Survey: Please do not count any revenue generated on cross-



Carrier Short-code/long-code programs, as this will be captured by the Mobile marketing providers

B. Mobile PERFORMANCE Advertising Revenue – (e.g. QR codes) – CPC, CPA, CPLoad only

Fees Advertisers pay to Digital or Mobile Publishers that are priced on a Mobile performance basis (e.g. cost-per-click, cost-per-action, cost-per-download, cost-per-lead or cost-per-inquiry), and can include user applications for service (e.g., applying for credit card, mortgage or insurance), surveys or registrations. They can also refer to qualified purchase inquiries (e.g. auto dealers which pay a fee in exchange for receiving a qualified purchase inquiry via Mobile) or provide consumer information (demographic, contact, behavioral), where the consumer opts into being contacted by a marketer (alerts, SMS, email, postal, telephone, fax).

Included In Mobile Performance Revenue: CPC, CPA, CPLoad only;

Not Included: Mark-up by ad Agencies (gross); Production revenues;



SECTION C - Definitions of Leading Industry Advertiser Categories: 2017-18

The product and service categories in IAB Canada's Internet Advertising Revenue Surveys are consistent with those used by the U.S. IAB for its Internet Revenue Study. The categories were drawn from the North American Industry Classification

System (NAICS), which is an index of types of business establishments with corresponding descriptions, developed jointly by the U.S, Statistics Canada and Mexico to allow comparability in business statistics among the North American countries.*

Alcoholic Beverages – includes fermented and distilled alcoholic beverages; i.e. Beer/Ale, Wine and Liquor.

Automotive – includes all automotive-related categories including sale/purchase of vehicles and parts and maintenance.

Business & Industrial – products and services, this also includes manufacturing *

Consumer Packaged Goods – includes packaged goods, food products, household products, toiletries and tobacco.

Entertainment – includes film, music, TV, box office, video games and amusement & recreation.

Financial Services – includes commercial banks, credit agencies, personal credit institutions, consumer finance companies, loan companies, business credit institutions and credit card agencies. Also includes companies engaged in the underwriting, purchase, sale or brokerage of securities and other financial contracts.

Government, Social, Political Organizations – includes federal, provincial, and local government departments/agencies that administer, oversee and manage public programs; social and political organisations including unions and political parties, charities, educational institutions and services.*

Leisure Travel – includes travel, hotel, airlines and resorts.

Business Travel – includes travel, hotel, airlines and resorts.

Media – includes establishments primarily engaged in radio and television broadcasting (network and station) including commercial, religious, educational and other radio or television



stations. Also includes establishments primarily engaged in publishing newspapers, periodicals and books.

Pharma & Healthcare – includes pharmaceutical and medicine manufacturing of prescription and non-prescription/ generic and brand drugs/remedies; healthcare and social assistance including offices of health practitioners, home health care services/other ambulatory services, medical/diagnostic laboratories, nursing/residential care facilities, community care facilities for the elderly. *Also includes personal care, toiletries and cosmetic products.*

Real Estate – includes establishments primarily engaged in managing real estate for others; selling, renting and/or buying of real estate for others; and appraising real estate.

Retail – includes mail order/catalog and stores for apparel, restaurants/fast food, home furnishings/textiles, toys/ games, pet food/supplies, appliances, jewelry, drug / cosmetics stores, sporting / athletics goods retailers.

Consumer Electronics & Computers – includes hardware (computers, computer storage devices, and computer peripheral equipment), consumer electronics, prepackaged software (operating, utility and applications programs), local area network systems and network systems integration, computer processing and data preparation and data processing services.

Telecommunications – includes point-to-point communications services, including telephone voice and data communications, two-way mobile/cellular communications services and other non-vocal message communications services (e.g., cablegram, electronic mail and facsimile); includes multi-channel video providers on a subscription fee basis (e.g., cable television, wireless cable television and direct broadcast satellite services) including ISPs.

Exceptions: The 2 classifications “Government, Social, Political Organizations” and “Business & Industrial” are consistent with the definitions used by the IAB/PWC UK revenue surveys. Also - Other NAICS definitions above are augmented by IAB/PWC revenue surveys in the US/UK.



ABOUT IAB CANADA

Who We Are

The Interactive Advertising Bureau of Canada (IAB Canada) is the national voice and thought leader of the Canadian interactive marketing and advertising industry. We are the only trade association exclusively dedicated to the development and promotion of the digital marketing and advertising sector in Canada.

As a not-for-profit association, IAB Canada represents over 250 of Canada's most well-known and respected advertisers, ad agencies, media companies, service providers, educational institutions and government bodies. Our members represent a diverse range of stakeholders in the rapidly growing Canadian digital marketing and advertising sector, and include numerous small and medium sized enterprises.

What We Do

As the only organization fully-dedicated to the development and promotion of digital/interactive advertising in Canada, IAB Canada works with its members to:

- Conduct original, Canadian digital/interactive research;
- Establish and promote digital/interactive advertising standards & best practices;
- Build human capital, through educational courses, certification, our job board, and other initiatives that assist the industry in attracting, training and motivating human resources;
- Act as an advocate for the Canadian digital/interactive advertising industry to the Canadian government; and,
- Organize networking events that enhance communication between members.

IAB Canada & IAB Worldwide

IAB Canada is an independently-organized and operated organization, and is neither owned, controlled nor operated by any other Interactive Advertising Bureau, Inc. and all trademarks and names are used under license.



IAB Canada and global IABs work together closely on major projects and endeavours, but each country requires individual memberships. [Click here](#) for more about IAB Canada and about IAB Globally that IAB Canada fully endorses.

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