

# PricewaterhouseCoopers *IAB Online Advertising Expenditure Report*

Quarter ended: 30 June 2019  
Report released: 2 September 2019



An industry survey conducted by  
PricewaterhouseCoopers on behalf of  
the Interactive Advertising Bureau  
Australia

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# Background

Welcome to the IAB Online Advertising Expenditure Report (OAER or Report). This quarterly report of online advertising expenditure in the Australian marketplace has been prepared by PricewaterhouseCoopers (PwC) on behalf of the Interactive Advertising Bureau Australia (IAB).

## **About the IAB Online Advertising Expenditure Report**

The OAER provides an opportunity for stakeholders interested in the size of the online advertising market to access independently collated data about the state of online advertising expenditure in Australia. The online advertising markets reported in the OAER comprise expenditure on General Display advertising, Classifieds advertising, Search and Directories advertising, Mobile advertising and Video advertising.

Data and information reported directly to PwC by online advertisement selling companies representing over 1,000 web sites has been aggregated in this Report and is the only online industry sponsored and supported measurement of online advertising expenditure in Australia.

The survey is conducted and this report is prepared independently by PwC on behalf of the IAB; only aggregate results are published. PwC does not audit the information and provides no opinion or other form of assurance with respect to the information. Certain checks of submitted data are made – refer to Appendix B for more information. Individual company information is held in strict confidence with PwC. The list of contributors is disclosed in Appendix B.

## **Approach**

This Report has been prepared under the approach introduced in the June quarter 2012 OAER. In summary, the data collected from industry participants has been supplemented by additional data sources, including:

- Estimates for Google search, display, video, and mobile advertising
- Estimates for Facebook display, video and mobile advertising
- Estimates for LinkedIn display and classifieds advertising (from March quarter 2014)
- Estimates for Twitter display and mobile advertising (from June quarter 2015)
- Estimates for Snapchat display, video and mobile advertising (from December quarter 2017)
- Estimates for Spotify display, video and mobile advertising (from December quarter 2017)

Further details regarding scope and methodology are provided in the Report Scope, Methodology and Format section of Appendix B to this Report.

Percentages presented in this report are calculated based on the raw data and may differ from the percentages implied by the rounded expenditure figures in the text and tables.

From time to time, estimated expenditures are updated as new information, participants and data sources become available. This may cause a series break in the data and should be taken into account when considering historical trends.



Samantha Johnson  
Partner

PricewaterhouseCoopers  
2 September 2019

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# *Financial year ended 30 June 2019*

- *Executive Summary – Key trends*
- *Detailed Findings*
  - *Overall market*
  - *General Display advertising*
  - *Mobile advertising*
  - *Video advertising*
  - *General Display by industry*
  - *Classifieds advertising*
  - *Search & Directories advertising*

# Executive Summary – Financial Year 2019

## Key trends in the financial year ended 30 June 2019

### Total online advertising market hits \$9 billion

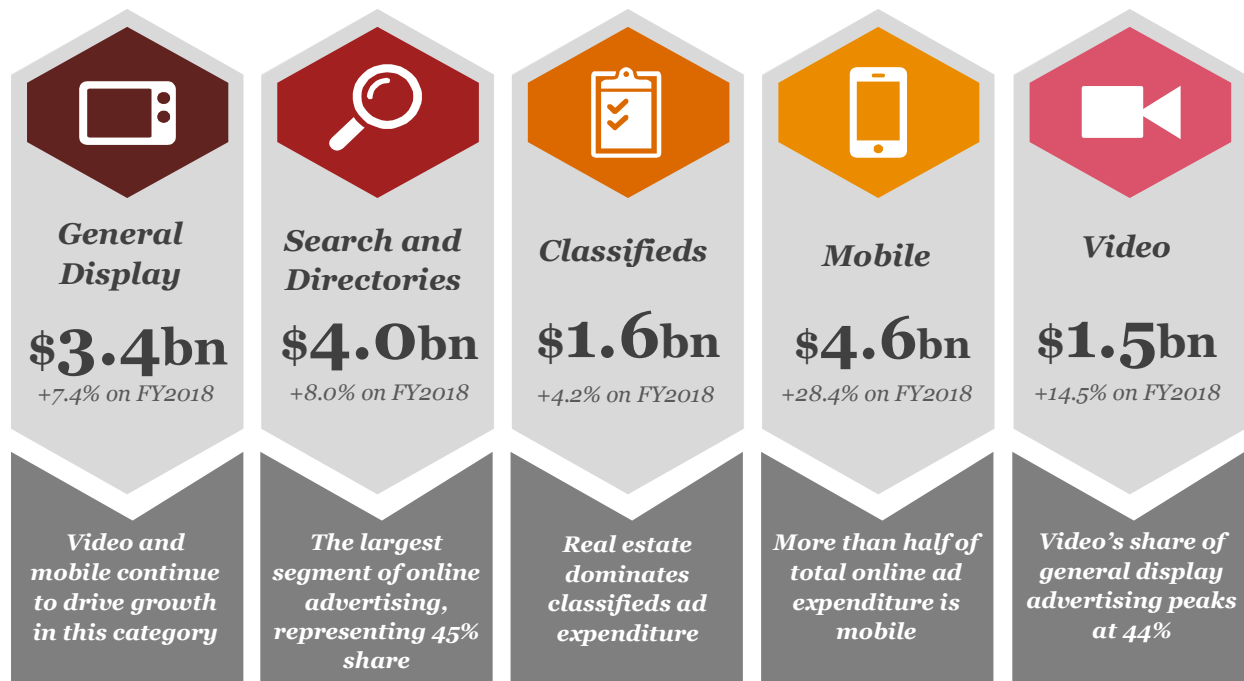
Based on submissions from publishers and estimates for Google, Facebook, LinkedIn, Spotify, Snapchat and Twitter, online advertising expenditure was \$9.0 billion in the twelve months ended 30 June 2019, representing growth of 7.1% on FY18. Of this, 45% was attributed to Search and Directories, 37% to General Display and the remaining 18% to Classifieds.



Figure 1: Online advertising expenditure, FY19 compared to FY18



*All online advertising categories experienced growth in 2019*



# Detailed findings – Financial year 2019

## Overall market – Financial year ended 30 June 2019

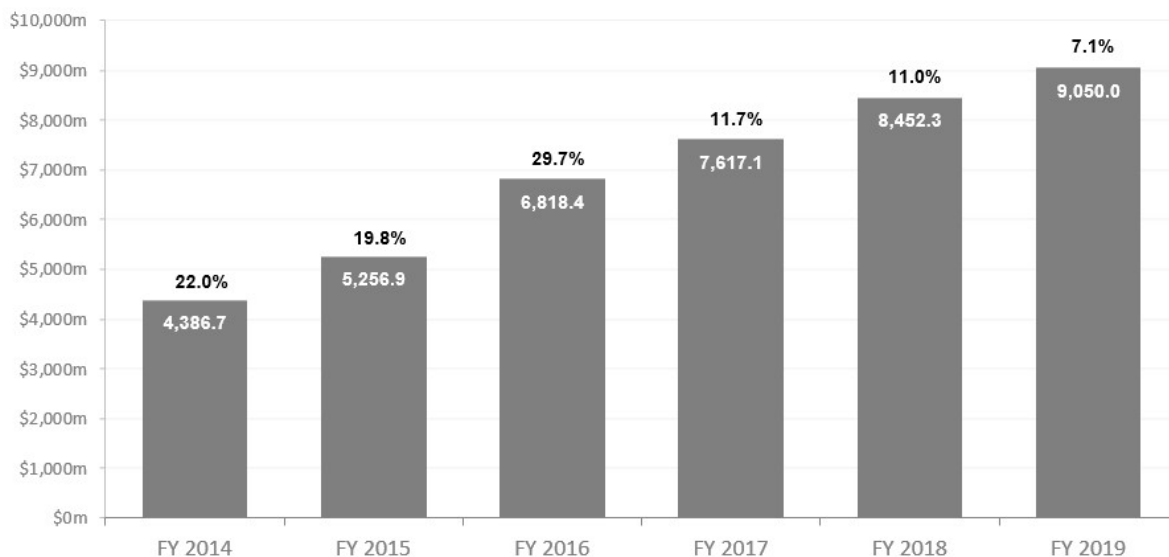
### Online advertising growth slows year on year

- The online advertising market grew 7.1% in the twelve months ended 30 June 2019. Growth slowed compared to the prior year’s gain of 11.0%.
- Search and Directories achieved the strongest growth, increasing 8.0% this financial year, whilst growth for General Display and Classifieds slowed compared to prior year with 7.4% and 4.2% annual growth respectively.

**“Australian businesses are operating in a challenging low growth environment. Investment in marketing is an essential tool for businesses to grow their available market to achieve growth.”**

*Jeremy Thorpe Partner & Chief Economist  
PwC Australia*

**Figure 2: Online advertising expenditure, by financial year (\$ million)**

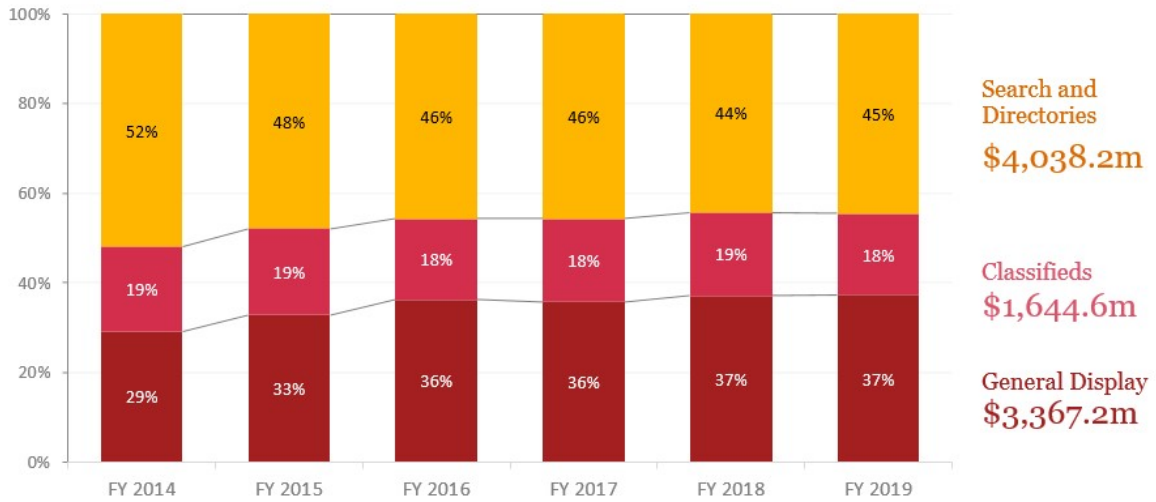


Note: Over the period since data has been collected, different methodologies have been adopted and accordingly, growth trends may be affected at the point of change in methodology. Refer to the Appendix for more detail and historical data.

*Search and Directories increases its share of online advertising expenditure*

- In the twelve months ended 30 June 2019, Search and Directories made up 45% of all online advertising expenditure, followed by General Display (37%) and Classifieds (18%).
- The growth achieved by Search and Directories saw the category gain share from Classifieds.

**Figure 3: Online advertising expenditure – category share**

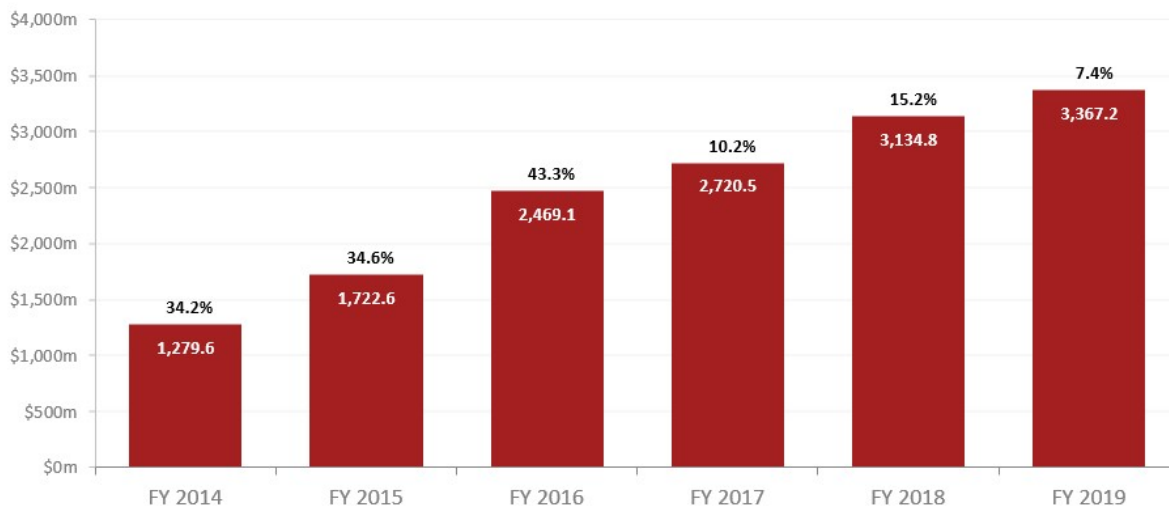


## General Display Advertising Expenditure – Financial year ended 30 June 2019

Although growth in General Display slows, the category marginally outperforms the total market

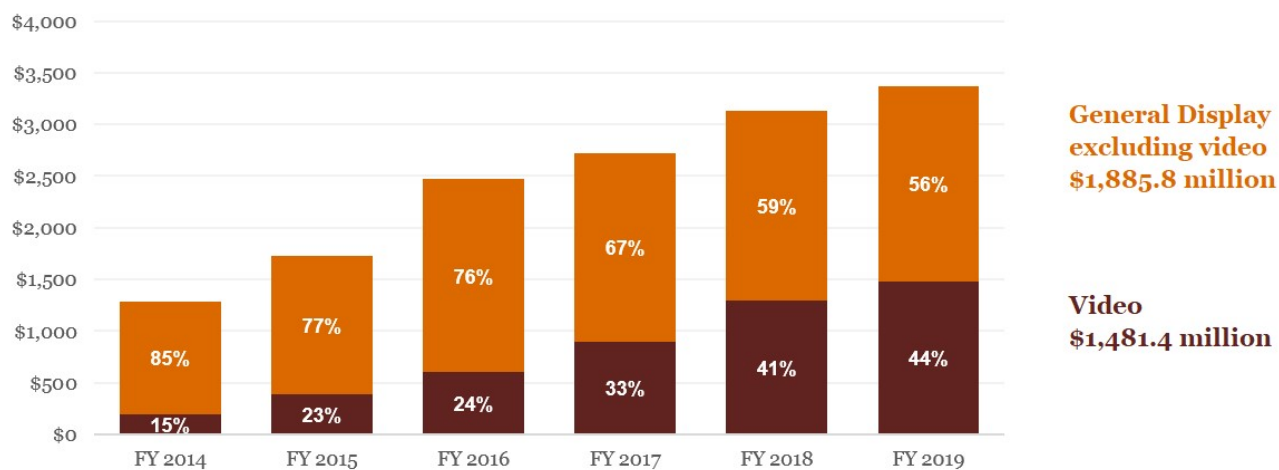
Total online advertising expenditure for General Display for the twelve months ended 30 June 2019 was \$3,367.2 million. This expenditure was an increase of \$232.4 million or 7.4% on the prior year.

**Figure 4: Total General Display advertising expenditure, by financial year (\$ million)**



Note: Over the period since data has been collected, different methodologies have been adopted and accordingly, growth trends may be affected at the point of change in methodology. Refer to the Appendix for more detail and historical data.

**Figure 5: Video’s share of General Display advertising expenditure, by financial year**

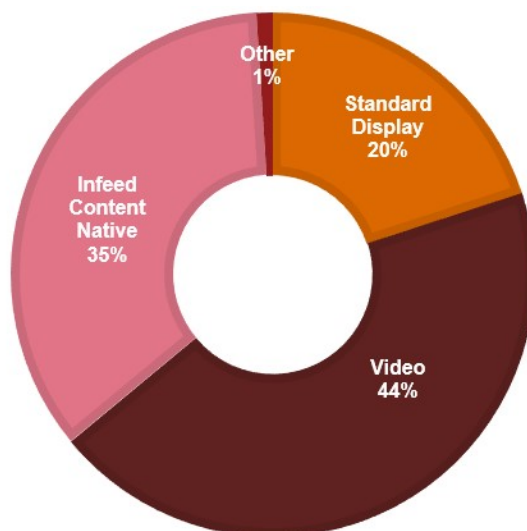


### Video's share of General Display peaks at 44% in FY19

With 44% share, video represents the largest segment of general display expenditure in the 2019 financial year. This is followed by infeed/content/native at 35% and standard display formats at 20%.

Each segment has a component of mobile advertising expenditure with mobile advertising making up 65% of total general display expenditure compared to 54% in the comparative financial year.

**Figure 6: Breakdown of general display advertising by type, FY2019**



**Figure 7: Breakdown of general display advertising by type, FY2019**

Period	Standard Display (\$m)	Infeed/Content/Native (\$m)	Video (\$m)	Other (\$m)	Total General display excl. video (\$m)	Total General display incl. video (\$m)
FY2019	669.0	1,180.7	1,481.4	36.1	1,885.8	3,367.2
FY2018	681.7	1,132.3	1,293.7	27.1	1,841.1	3,134.8

Period	Standard Display %	Infeed/Content/Native %	Video %	Other %
FY2019	20%	35%	44%	1%
FY2018	22%	36%	41%	1%

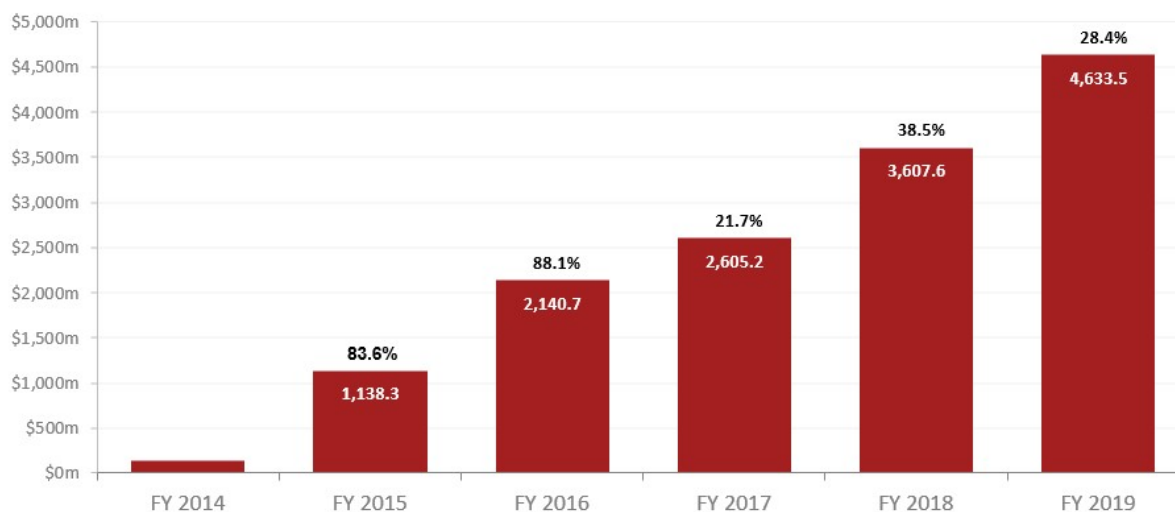
## **Mobile Advertising Expenditure – Financial year ended 30 June 2019**

### *Mobile advertising expenditure experiences marked growth*

Between financial years 2018 and 2019, mobile advertising increased by \$1 billion (or 28.4%), from \$3.6 billion to \$4.6 billion. With the introduction of 5G in the near future, faster data transfer speeds provide an opportunity for future growth in this segment.



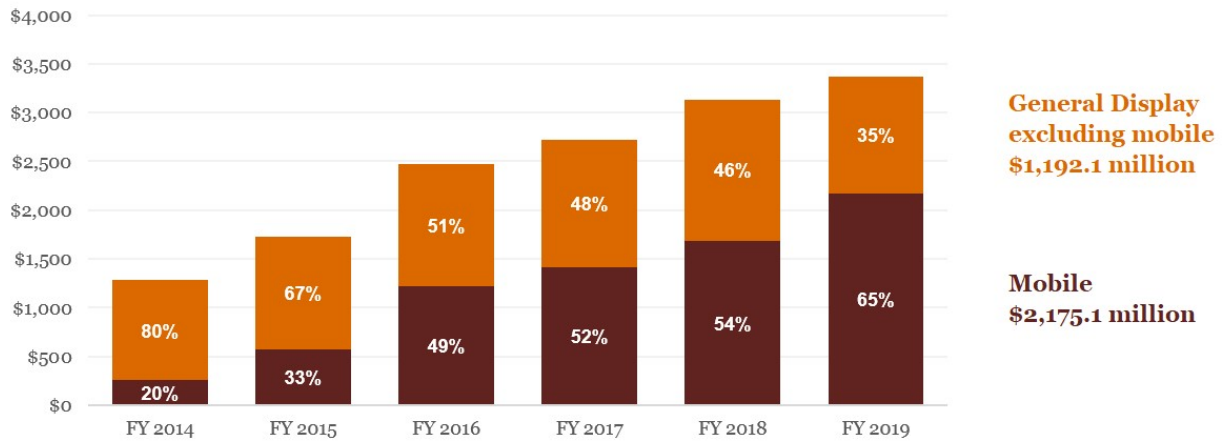
Of the \$4.6 billion of mobile advertising expenditure in the twelve months ended 30 June 2019, 53% was attributed to mobile search and 47% to mobile display (consistent with the prior financial year).

**Figure 8: Total mobile advertising expenditure, by financial year (\$ million)****Figure 9: Annual historical mobile advertising expenditure data**

Period	Mobile search (\$m)	Mobile display (\$m)	Total Mobile advertising (\$m)	Mobile advertising growth Year/Year
FY19	2,458.4	2,175.1	4,633.5	28.4%
FY18	1,929.2	1,687.2	3,607.6	38.5%
FY17	1,187.0	1,418.2	2,605.2	21.7%
FY16	923.1	1,217.5	2,140.7	88.1%
FY15	565.4	572.8	1,138.3	83.6%
FY14	365.3	254.7	620.1	**

\*\* - Changes are not applicable for these periods due to a break in the data series resulting from the availability of new sources of data used in the estimation of Google and Facebook revenues in the September quarter 2014. This does not affect data reported at the aggregate General Display and Search and Directories level.

**Figure 10: Mobile's share of General Display advertising expenditure, by financial year**



## ***Video Advertising Expenditure – Financial year ended 30 June 2019***

### *Video advertising grows 14.5% in 2019*

Video advertising grew \$187.7 million (or 14.5%) from \$1.3 billion in 2018 to \$1.5 billion in 2019. The definition of the video category is included in the Glossary.

**+14.5%**

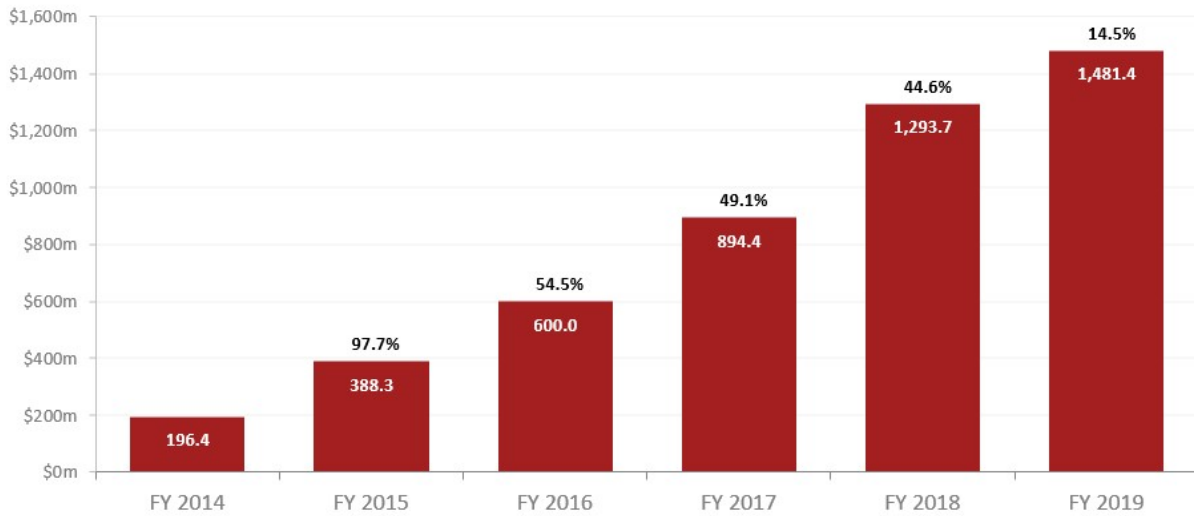


Online video market growth, 2018 vs 2019

**\$1,481.4m**

Total video market, 2019

**Figure 11: Total video advertising expenditure, by financial year (\$ million)**



**Figure 12: Annual historical video advertising expenditure data**

Period	Video advertising expenditure (\$m)	Video advertising growth Year/Year
FY2019	1,481.4	14.5%
FY2018	1,293.7	44.6%
FY2017	894.4	49.1%
FY2016	600.0	54.5%
FY2015	388.3	97.7%
FY2014	196.4	**

\*\* Video advertising expenditure was reported from Q3 2013. As such like for like growth is not available for this period.

## General Display Expenditure by Industry Category – Financial year ended 30 June 2019

### Automotive, Real Estate and Retail continue to dominate General Display

Automotive, Real Estate and Retail were the top three General Display industry categories in the twelve months ended 30 June 2019, representing 46.6% of the reported General Display advertising market.<sup>1</sup> The share of spend for these three categories has declined compared to the twelve months prior, where they represented 50.4% of the reported General Display advertising market. Travel (5.8%) and government (4.5%) categories have seen notable increases in their shares of 1.8% and 1.4% respectively.

**Figure 13: Top five industry categories by expenditure share, twelve months ended 30 June 2019**

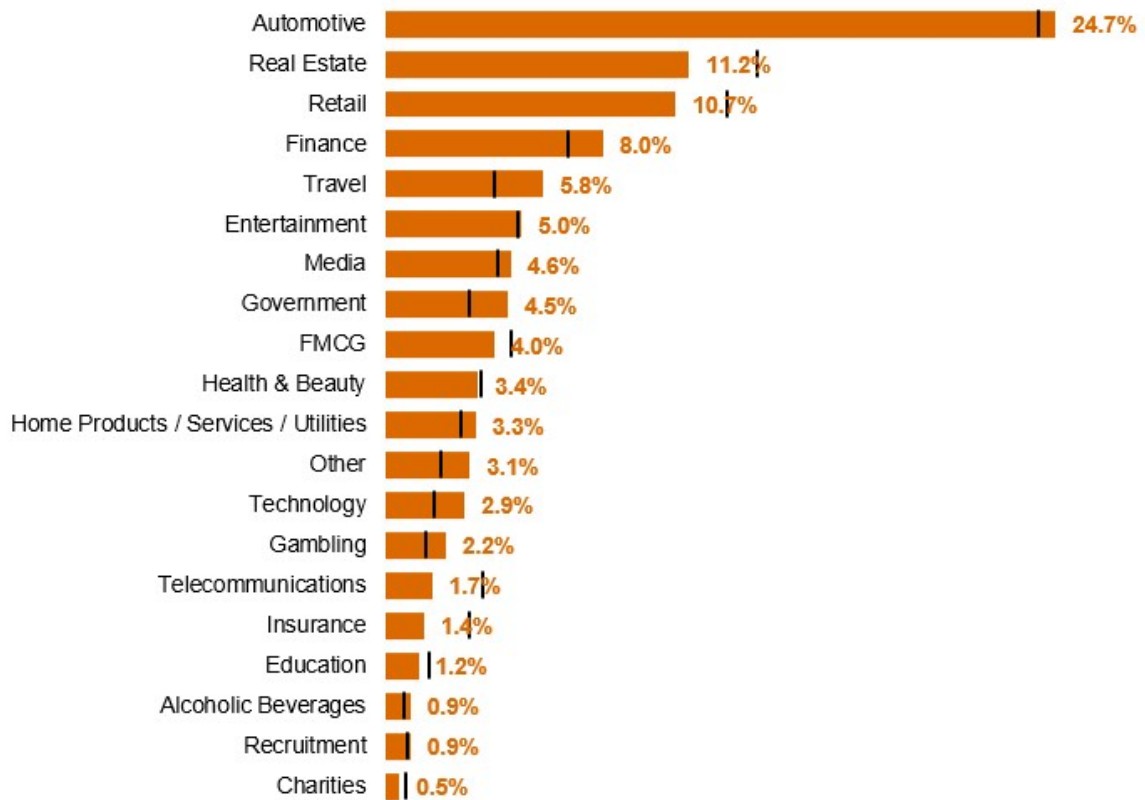


**\* The contributor base for the industry category data has changed since the prior report. As a result historical market shares have been restated to provide a like for like comparison.**

<sup>1</sup> Reported General Display market refers to General Display expenditure reported by survey contributors and therefore excludes Facebook, LinkedIn, Twitter, Spotify, Snapchat and Google General Display advertising.

**Figure 14: Industry trends in General Display, FY2019 compared to FY2018**

The contributor base for the industry category data has changed since the prior report. As a result historical FY18 industry shares have been restated to provide a like for like comparison.



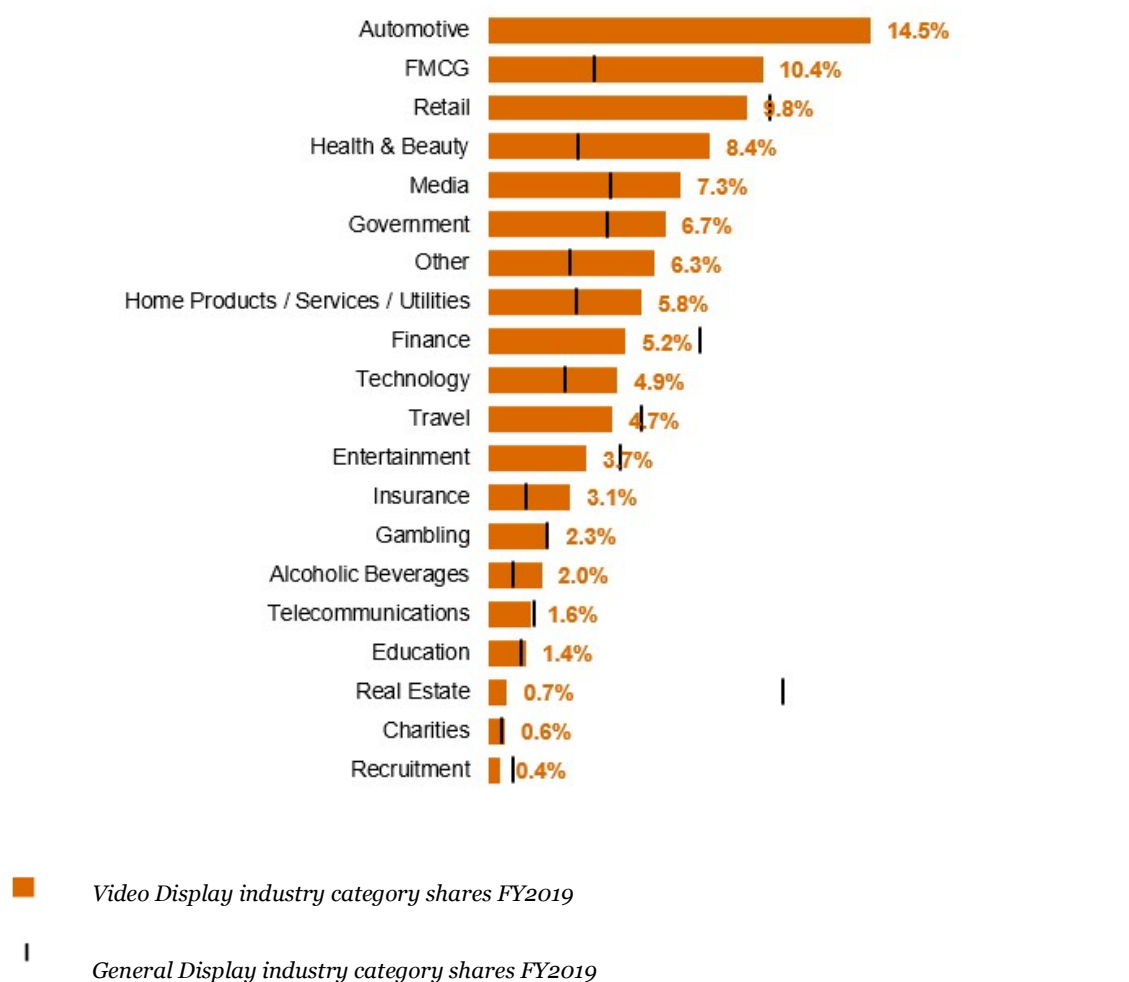
- Industry category shares in FY2019
- | Industry category shares in FY2018 (restated)

### Automotive grows its share of video advertising in FY2019

Automotive recorded the greatest share of reported general display video advertising in FY2019 taking over from FMCG (Fast Moving Consumer Goods) which was the dominant industry category in FY2018.

FMCG continues to be overly represented in video display compared to general display. FMCG’s video display’s share is 10.4%, more than double its 4.0% share in total general display.

**Figure 15: General Display – Video industry category share compared to total General Display industry category share, FY2019 compared to FY2018**



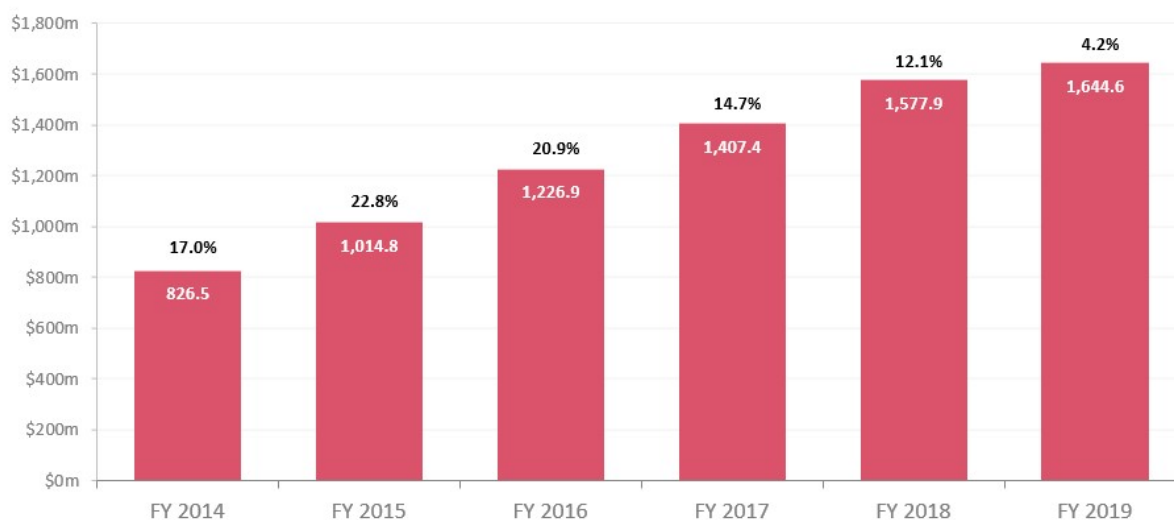
## ***Classifieds Advertising Expenditure – Financial year ended 30 June 2019***

### *Classifieds year on year growth slows*

The total online advertising expenditure for Classifieds for the twelve months ended 30 June 2019 was \$1,644.6 million. This expenditure was an increase of \$66.7 million or 4.2% from the prior financial year.

Real Estate was the leading category for Classifieds in the twelve months ended 30 June 2019, followed by Recruitment, then Automotive. This is consistent with prior years.

**Figure 16: Total Classifieds advertising expenditure, by financial year (\$ million)**



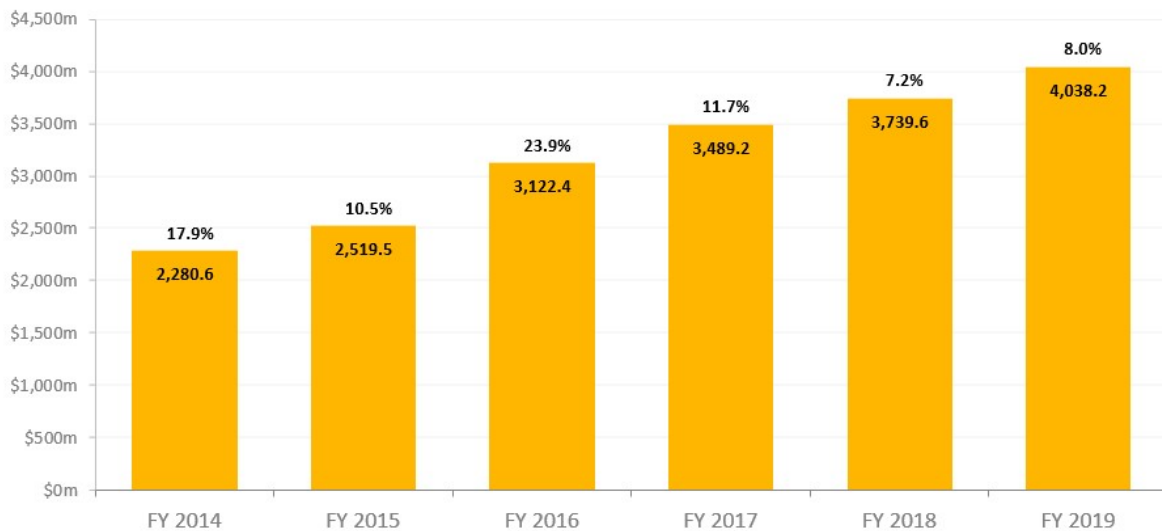
Note: New estimates for LinkedIn's recruitment classifieds revenues were introduced in the September quarter 2014 and accordingly, growth trends may be affected at the point of change in methodology. Refer to the Appendix for more detail and historical quarterly data.

## ***Search and Directories Advertising Expenditure – Financial year ended 30 June 2019***

### *Search and Directories experiences steady growth*

The total online advertising expenditure for Search and Directories for the twelve months ended 30 June 2019 was \$4,038.2 million. This was an increase of \$298.6 million or 8.0% compared to financial year 2018.

**Figure 17: Total Search and Directories advertising expenditure, by financial year (\$ million)**



Note: Over the period since data has been collected, different methodologies have been adopted and accordingly, growth trends may be impacted at the point of change in methodology. Refer to the Appendix for more detail and historical quarterly data.

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# *Three months ended 30 June 2019*

- *Executive Summary – Key trends*
- *Detailed Findings*
  - *Overall market*
  - *General Display advertising*
  - *Mobile advertising*
  - *Video advertising*
  - *General Display by industry*
  - *Classifieds advertising*
  - *Search & Directories advertising*

# Executive Summary for Q2 2019

## Key trends in the three months ended 30 June 2019

Total online advertising achieves 5.0% growth year on year

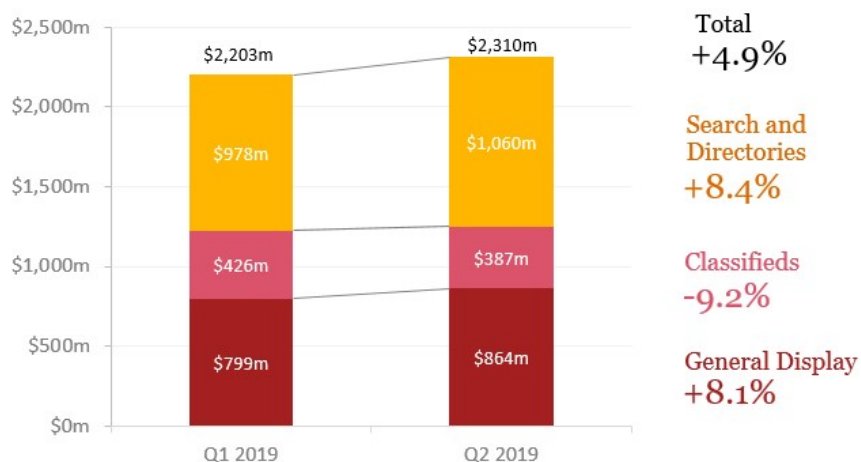
Search and Directories experienced strong growth compared to the same quarter in the prior year (Figure 18). General Display experienced modest growth of 4.3%. Classifieds declined by 5.9%, with weaker consumer confidence impacting discretionary spend and listings.

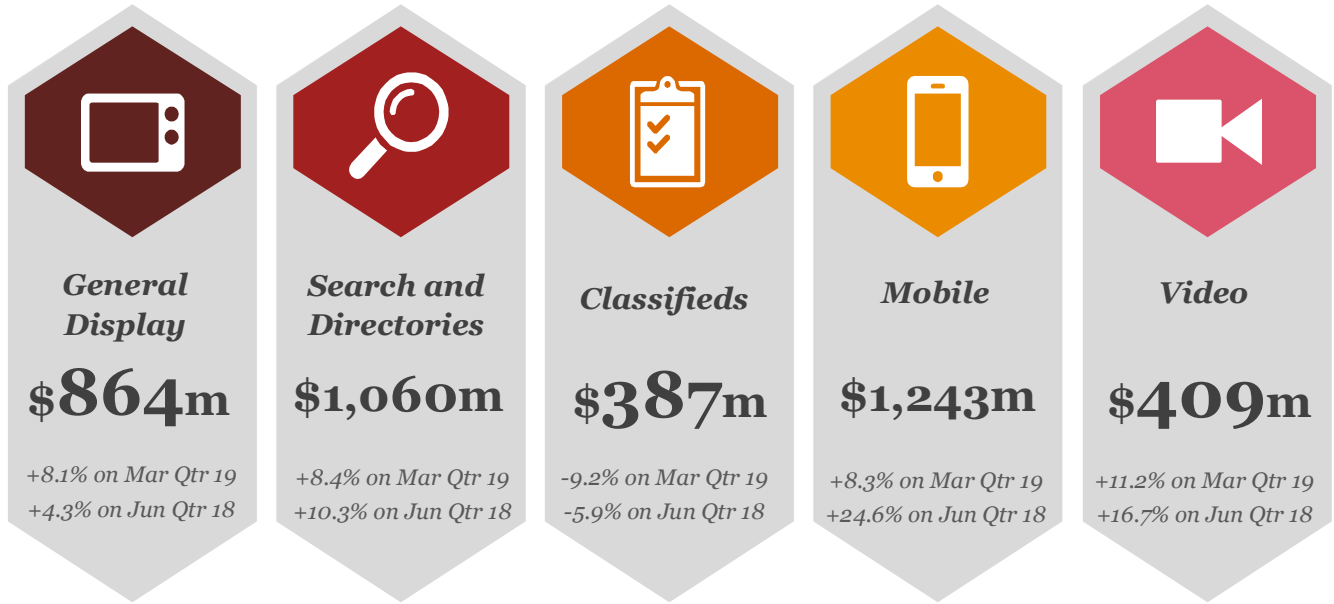
Online advertising expenditure saw an overall increase compared to the March quarter, driven by growth in Search and Directories at 8.4%, followed by General Display at 8.1% (Figure 19).

**Figure 18: Online advertising expenditure compared to prior comparative quarter (June quarter 2018)**



**Figure 19: Online advertising expenditure compared to immediate prior quarter (March quarter 2019)**





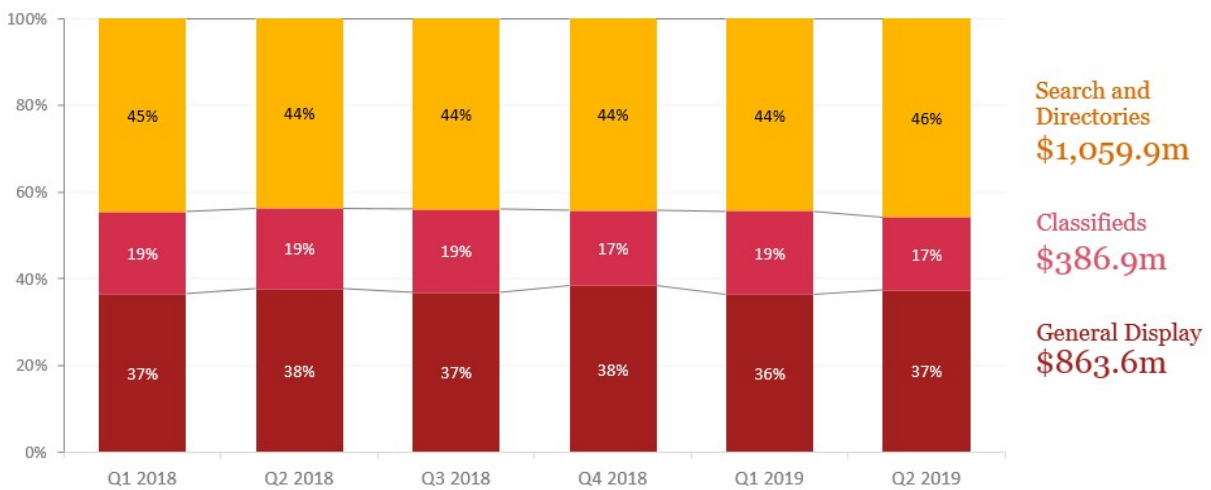
# Detailed findings for Q2 2019

## Overall market – Three months ended 30 June 2019

### Search & Directories increases its market share to 46%

- The online advertising market increased 4.9% from the prior quarter to \$2,310 million in the June quarter 2019.
- Year on year growth in the online advertising market in the June quarter was 5.0%.
- Search & Directories grew at the fastest pace, increasing by 8.4% compared to the March quarter 2019, largely due to the continued strength of mobile.
- Search & Directories continues to represent the largest segment share at 46% taking share from classifieds which has suffered from declines in consumer confidence impacting discretionary spend and listings.

Figure 20: Online advertising expenditure – category share



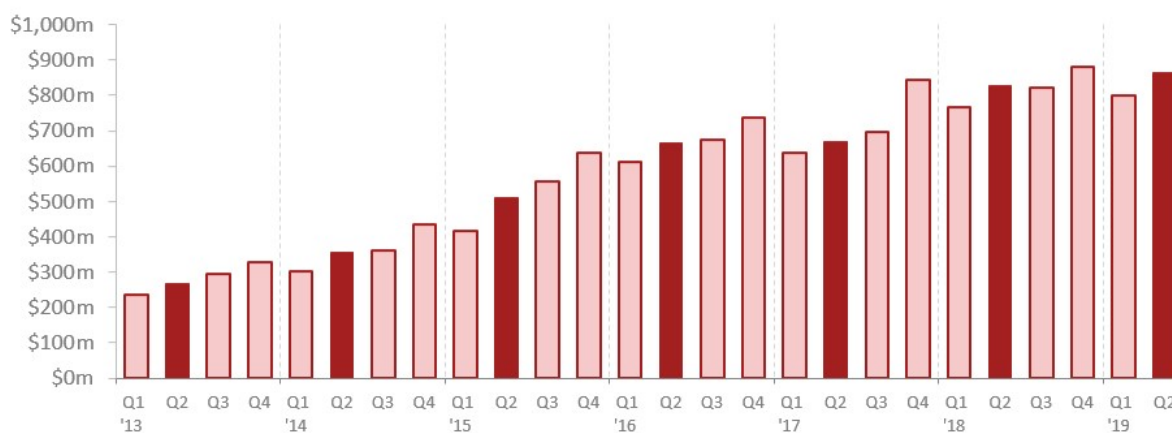
## General Display Advertising Expenditure – Three months ended 30 June 2019

### General Display experiences steady year on year growth

Total General Display online advertising expenditure for the June quarter 2019 was \$863.6 million. This expenditure represented an increase of 8.1% on the March quarter 2019.

Compared to the same quarter in 2018, General Display online advertising expenditure this quarter grew 4.3%.

**Figure 21: Total General Display advertising expenditure, by quarter**



Note: Over the period since data has been collected, different methodologies have been adopted and accordingly, growth trends may be affected at the point of change in methodology. Refer to the Appendix for more detail and historical quarterly data.

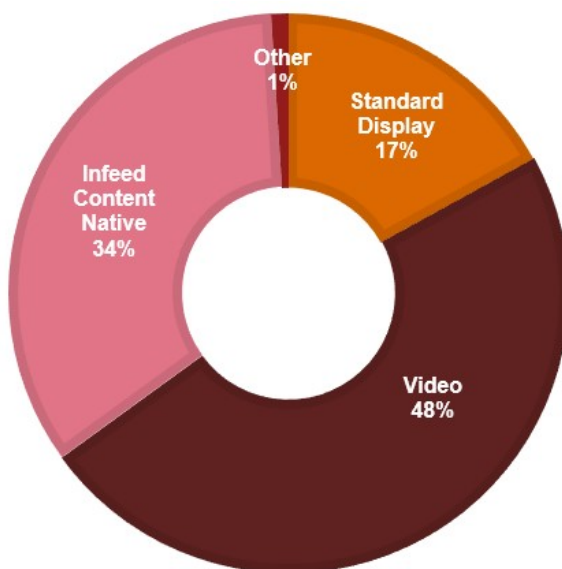
### Video’s share of general display experiences notable growth

With share at 48%, video represents the largest component of general display expenditure in the June 2019 quarter. This is followed by infeed, content and native at 34% and standard display formats at 17%.

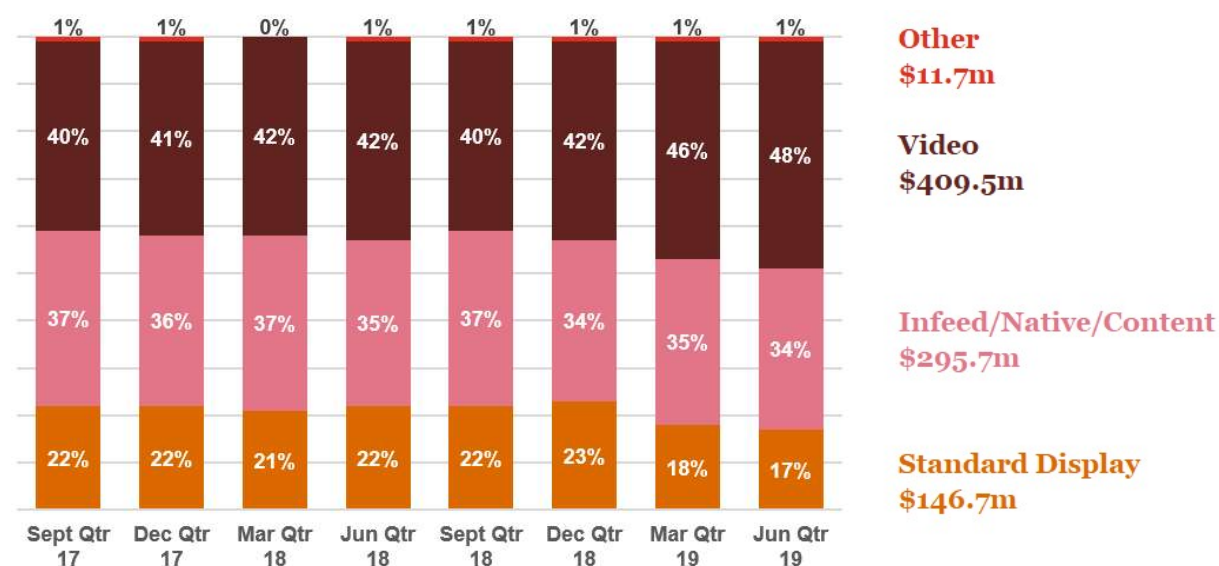
Video’s share of general display has grown steadily since September 2018.

Each segment has a component of mobile advertising expenditure with mobile advertising making up 68% of total general display expenditure, an increase from 56% in the June 2018 quarter.

**Figure 22: Breakdown of general display advertising by type for the June 2019 quarter**



**Figure 23: Breakdown of general display advertising by type, by quarter**



**Figure 24: Breakdown of general display advertising by type for the June 2019 quarter**

Period	Standard Display (\$m)	Infeed/Native/Content (\$m)	Video (\$m)	Other (\$m)	Total General display excl. video (\$m)	Total General display incl. video (\$m)
Jun Qtr 19	146.7	295.7	409.5	11.7	454.1	863.6
Mar Qtr 19	145.5	277.1	368.3	8.1	430.7	799.0
Dec Qtr 18	198.5	299.8	375.3	8.2	506.5	881.8
Sept Qtr 18	178.3	308.1	328.4	8.0	494.4	822.8
June Qtr 18	179.8	290.0	351.0	6.9	476.7	827.7
Mar Qtr 18	162.1	280.8	320.0	4.3	447.2	767.2
Dec Qtr 17	184.8	305.5	344.2	8.9	499.2	843.4
Sept Qtr 17	155.0	256.0	278.5	7.0	418.0	696.5

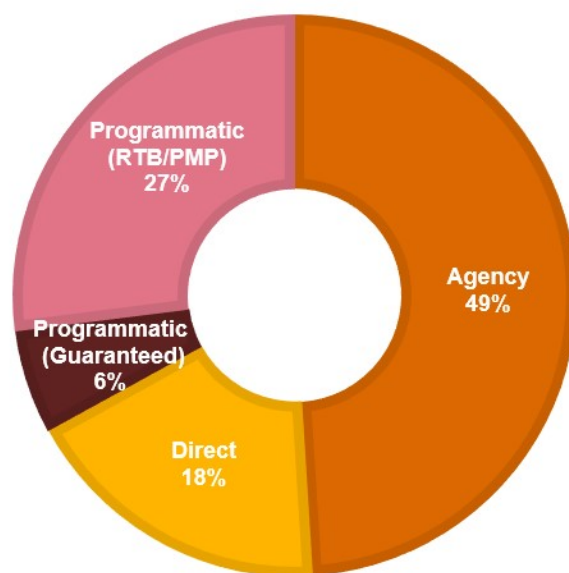
Period	Standard Display %	Infeed/Native/Content %	Video %	Other %
Jun Qtr 19	17%	34%	48%	1%
Mar Qtr 19	18%	35%	46%	1%
Dec Qtr 18	23%	34%	43%	1%
Sept Qtr 18	22%	37%	40%	1%
Jun Qtr 18	22%	35%	42%	1%
Mar Qtr 18	21%	37%	42%	0%
Dec Qtr 17	22%	36%	41%	1%
Sept Qtr 17	22%	37%	40%	1%

Notes: General display expenditure information by type is aggregated for all publishers with the exception of Google, Facebook, Twitter, Snapchat, Spotify and Linked In. An estimate has been included for Google, Facebook, Twitter, Snapchat, Spotify and LinkedIn.

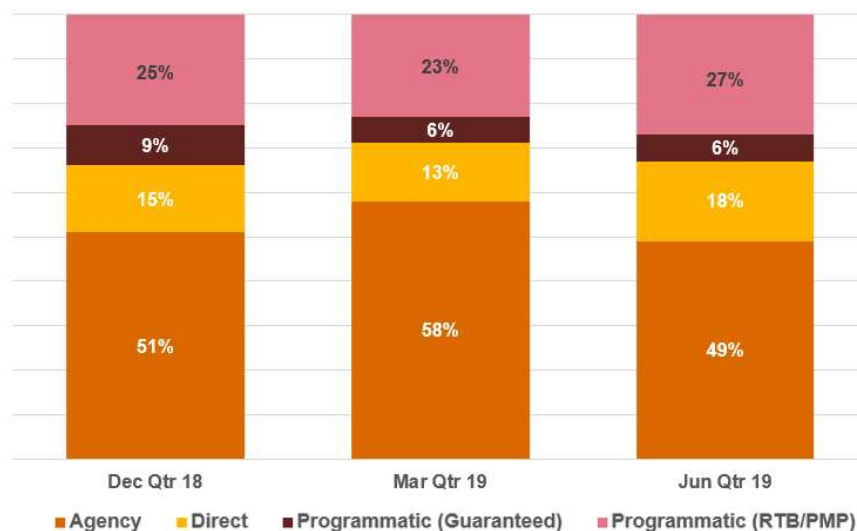
*Almost half of general display advertising viewed on content publisher’s inventory was bought via media agencies*

With a share of 49%, almost half of all general display expenditure on content publisher’s inventory for the June 2019 quarter was bought by media agencies via an insertion order or non-programmatic method. 33% of general display advertising was bought programmatically, an increase of 4% on the prior quarter; taking share from media agencies.

**Figure 25: Breakdown of general display advertising for content publisher’s inventory, by buying method, June 2019**



**Figure 26: Breakdown of general display advertising for content publisher’s inventory by buying method, by quarter**

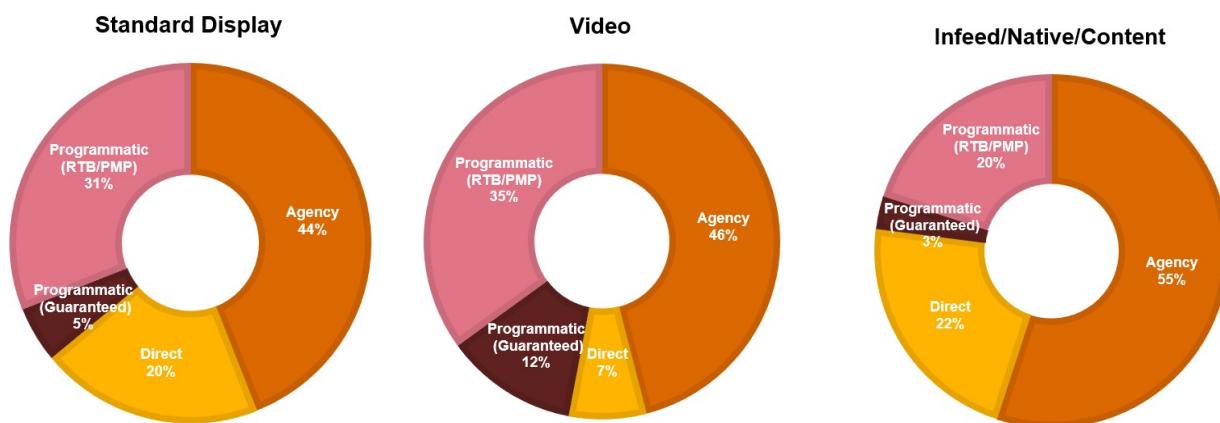


*The share of **content publishers’** video inventory bought programmatically is the largest of all general display advertising types*

With 47% of content publishers’ video inventory being sold programmatically, video represents the general display type with the largest share sold programmatically either by real time bidding via an exchange or private market place. Connected TV (CTV) contributes significantly to this with 53% of content publishers’ CTV inventory being sold programmatically.

Standard display and infeed/native/content for content publishers are still primarily purchased by agencies at 44% and 55% respectively.

**Figure 27: Breakdown of general display advertising for content publisher’s inventory, by type and buying method, June 2019**



## Mobile Advertising Expenditure – Three months ended 30 June 2019

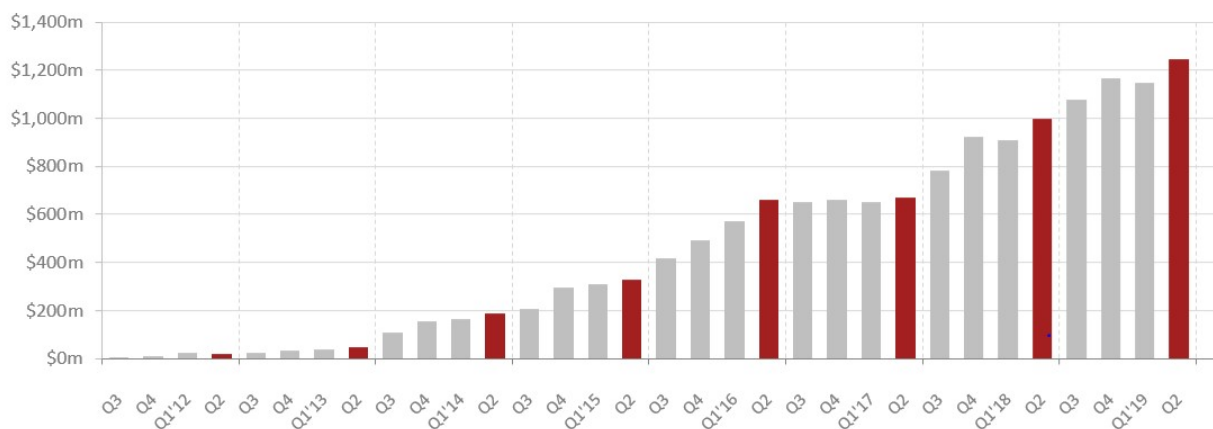
### Mobile’s contribution to total online advertising expenditure continues to grow

Mobile advertising comprises General Display and Search expenditures and also includes mobile video expenditure. The figures are based on participants’ data, industry estimates for Google’s mobile display and search revenues and estimates for Twitter, Facebook, Spotify and Snapchat mobile display revenues.

Mobile advertising expenditure increased to \$1,243.0 million in the June quarter 2019, with 53% of mobile advertising expenditure attributed to Mobile Search and 47% to Mobile Display.

Mobile’s share of general display advertising continues to grow from 56% in June 2018 to 68% in June 2019.

**Figure 28: Mobile advertising expenditure, by quarter**



Note: Series breaks occurred between Q2-Q3 2013 and Q3-Q4 2014.

**Figure 29: Quarterly historical mobile advertising expenditure data**

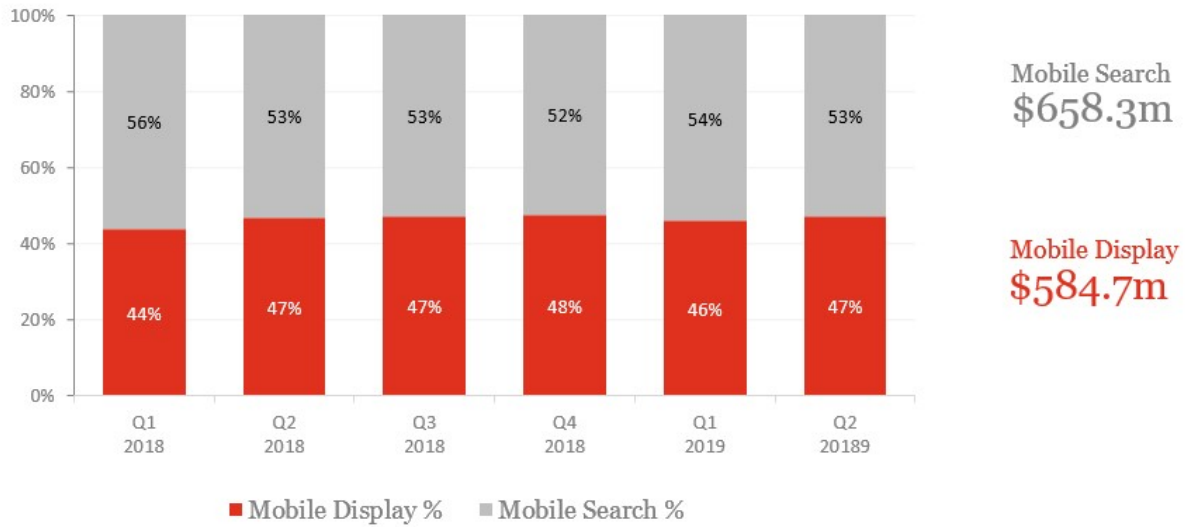
Period	Mobile search (\$m)	Mobile display (\$m)	Total Mobile advertising (\$m)	Mobile advertising growth	
				Qtr / Qtr	Year / Year
Jun Qtr 19	658.3	584.7	1,243.0	8.3%	24.6%
Mar Qtr 19	619.5	527.7	1,147.2	-1.5%	26.2%
Dec Qtr 18	611.2	553.8	1,165.0	8.0%	26.6%
Sept Qtr 18	569.4	508.9	1,078.3	8.1%	38.2%
Jun Qtr 18	530.6	466.9	997.5	9.7%	38.3%
Mar Qtr 18	510.8	398.3	909.1	-1.2%	39.2%
Dec Qtr 17	481.8	438.6	920.4	17.9%	39.5%
Sept Qtr 17	406.0	374.5	780.5	8.2%	36.8%
Jun Qtr 17	354.4	366.9	721.3	10.4%	32.7%
Mar Qtr 17	312.1	341.1	653.2	-1.1%	28.7%
Dec Qtr 16	285.2	374.8	660.0	15.7%	33.7%
Sept Qtr 16	235.3	335.4	570.7	5.0%	36.2%
Jun Qtr 16	227.0	316.7	543.7	7.1%	65.5%
Mar Qtr 16	217.2	290.5	507.7	2.8%	64.6%
Dec Qtr 15	214.6	279.4	494.0	17.9%	67.0%
Sep Qtr 15	188.1	230.8	418.9	27.5%	103.8%
Jun Qtr 15	139.6	188.9	328.5	6.5%	73.0%
Mar Qtr 15	157.8	150.8	308.5	4.3%	88.6%
Dec Qtr 14	164.9	130.9	295.7	43.9%	89.6%
Sep Qtr 14	112.7	92.8	205.5	8.2%	85.6%
Jun Qtr 14	109.8	80.1	189.9	16.1%	**
Mar Qtr 14	99.0	64.6	163.6	4.9%	**
Dec Qtr 13	92.0	64.0	156.0	40.9%	**
Sept Qtr 13	64.6	46.1	110.7	**	**
Jun Qtr 13	20.1	25.8	45.9	25.4%	160.8%
Mar Qtr 13	17.6	19.0	36.6	8.3%	181.5%
Dec Qtr 12	14.9	18.9	33.8	54.3%	255.8%
Sept Qtr 12	8.8	13.1	21.9	24.4%	192.0%

\*\* Changes are not applicable for these periods due to a break in the data series resulting from the availability of new sources of data used in the estimation of Google and Facebook revenues in the September quarter 2014. This does not affect data reported at the aggregate General Display and Search and Directories level.

*Search remains the dominant advertising category for mobile*

Based on submissions from publishers and estimates for Google, Facebook, Twitter, Snapchat and Spotify, the breakdown between Search and Display mobile advertising for the quarter is shown in Figure 30. In the June quarter 2019, Search accounted for 53% of mobile advertising expenditure, and Display accounted for 47%.

**Figure 30: Mobile Search and Mobile Display – category share**



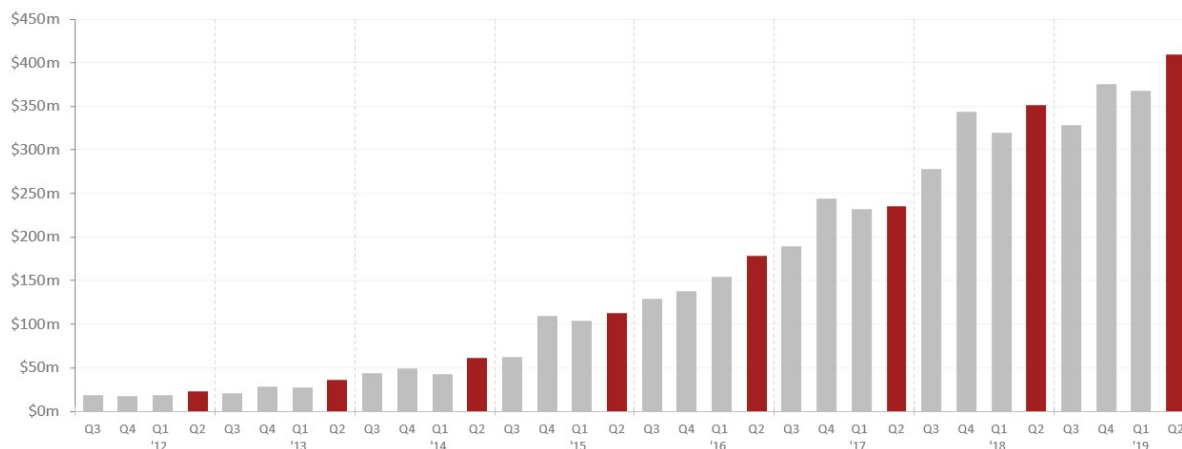
## Video Advertising Expenditure – Three months ended 30 June 2019

### Video advertising grows steadily during the June quarter

The video advertising expenditure reported below is included in the total General Display expenditure for the relevant periods. The definition of the video category is included in the Glossary.

Based on submissions from publishers and estimates for Google, Facebook, Twitter, Spotify and Snapchat, video advertising expenditure for the quarter is shown in Figure 31. Video advertising for the June quarter 2019 was \$409.5 million. This was an increase of \$41.2 million (or 11.2%) on the March 2019 quarter.

**Figure 31: Video advertising expenditure, by quarter**



Notes: A series break occurred between Q3-Q4 2014. Video advertising expenditure information was aggregated for all publishers with the exception of Google. An estimate has been included for Google.

**+16.7%**

Online video market growth  
June Qtr 2019 vs June Qtr 2018

**\$409.5m**

Total video market, June Qtr 2019

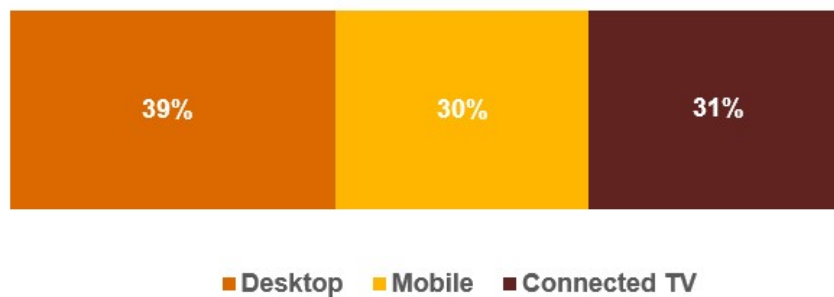
### *Desktop maintains the highest share of video advertising expenditure for **content publishers***

Thirty nine percent of video advertising for content publishers was viewed via desktop followed by 31% via connected TV and 30% via mobile.

The share of video advertising viewed using a connected TV has decreased since the March quarter from 32% to 31%. Mobile's share increased from 29% to 30%. Desktop's share remained consistent.

Note: Expenditure by device presented below is only in relation to content publishers and therefore percentages presented below cannot be extrapolated across total video expenditure.

**Figure 32: Video advertising expenditure for content publishers, by device**



**Figure 33: Quarterly historical video expenditure data**

Period	Video expenditure (\$m)	Growth	
		Qtr / Qtr	Year / Year
Jun Qtr 19	409.5	11.2%	16.7%
Mar Qtr 19	368.3	-1.9%	15.1%
Dec Qtr 18	375.3	14.3%	9.0%
Sept Qtr 18	328.4	-6.4%	17.9%
Jun Qtr 18	351.0	9.7%	49.2%
Mar Qtr 18	320.0	-7.0%	38.1%
Dec Qtr 17	344.2	23.6%	41.4%
Sept Qtr 17	278.5	18.4%	51.4%
Jun Qtr 17	235.2	1.5%	32.1%
Mar Qtr 17	231.7	-4.8%	49.8%
Dec Qtr 16	243.5	32.3%	76.1%
Sept Qtr 16	184.0	3.3%	42.7%
Jun Qtr 16	178.1	15.1%	57.8%
Mar Qtr 16	154.7	11.9%	48.6%
Dec Qtr 15	138.3	7.3%	26.0%
Sep Qtr 15	128.9	14.1%	106.9%
Jun Qtr 15	112.9	8.5%	83.9%
Mar Qtr 15	104.1	-5.1%	142.1%
Dec Qtr 14	109.7	76.2%	124.0%
Sep Qtr 14	62.3	1.5%	44.5%
Jun Qtr 14	61.4	42.8%	72.0%
Mar Qtr 14	43.0	-12.2%	55.8%
Dec Qtr 13	49.0	13.7%	71.9%
Sept Qtr 13	43.1	20.7%	114.4%

Note: Percentage changes are calculated based on raw data and may differ from the percentage changes implied by the rounded expenditure figures presented in the table.

## General Display Expenditure by Industry Category – Three months ended 30 June 2019

### Automotive continues to lead General Display expenditure industry category share

Automotive and Retail were the top two dominant General Display industry categories in the June quarter 2019, representing 35.2% of the reported General Display advertising market.<sup>2</sup> The contribution from these two industries in aggregate has marginally increased since the March 2019 quarter (Automotive and Retail made up 34.2% of General Display market in the comparative prior quarter). Government saw an increase in its share in the lead up to the May federal election from 5.1% in March 2019 to 6.7% in June 2019.

**Figure 34: Top five industry categories by expenditure share, June quarter 2019**

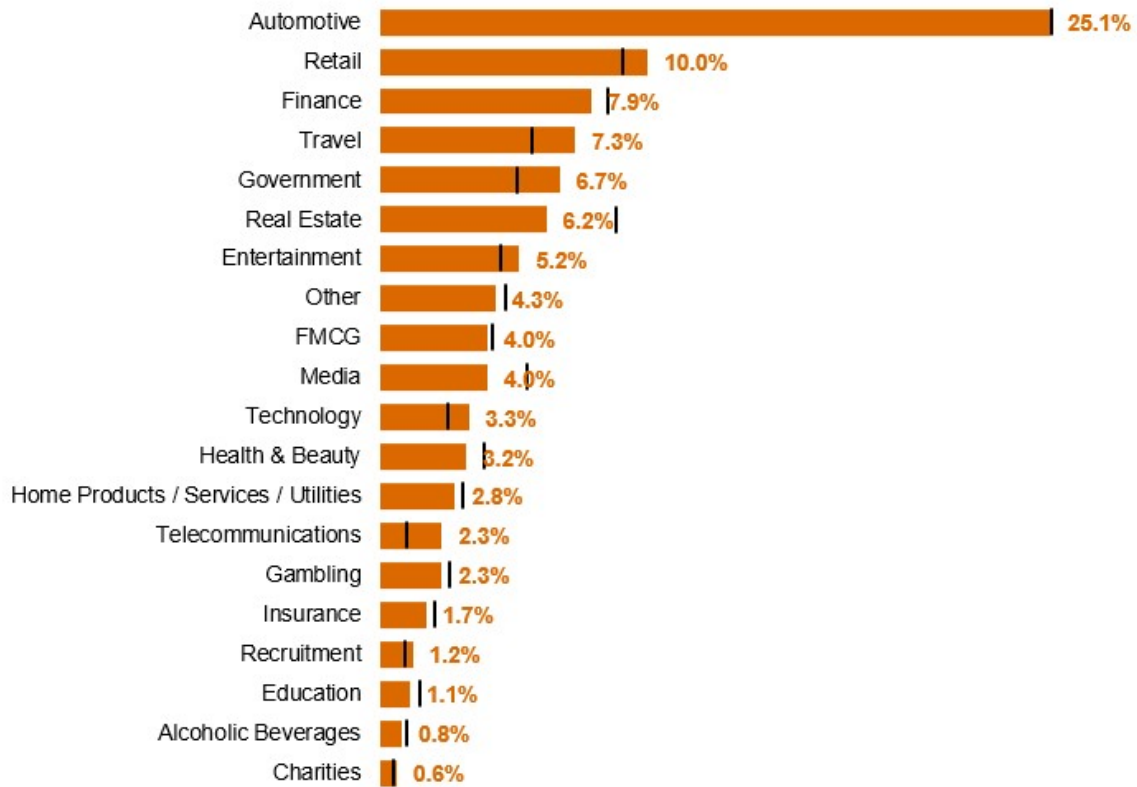


**\* The contributor base for the industry category data has changed since the prior report. As a result historical market shares have been restated to provide a like for like comparison.**

<sup>2</sup> Reported General Display market refers to General Display expenditure reported by survey contributors and therefore excludes Facebook, Google, Twitter, Snapchat, Spotify and LinkedIn General Display advertising.

**Figure 35: General Display – Category share compared to total General Display industry category share, June quarter 2019 compared to March quarter 2019**

**The contributor base for the industry category data has changed since the prior report. As a result historical March 2019 industry shares have been restated to provide a like for like comparison.**



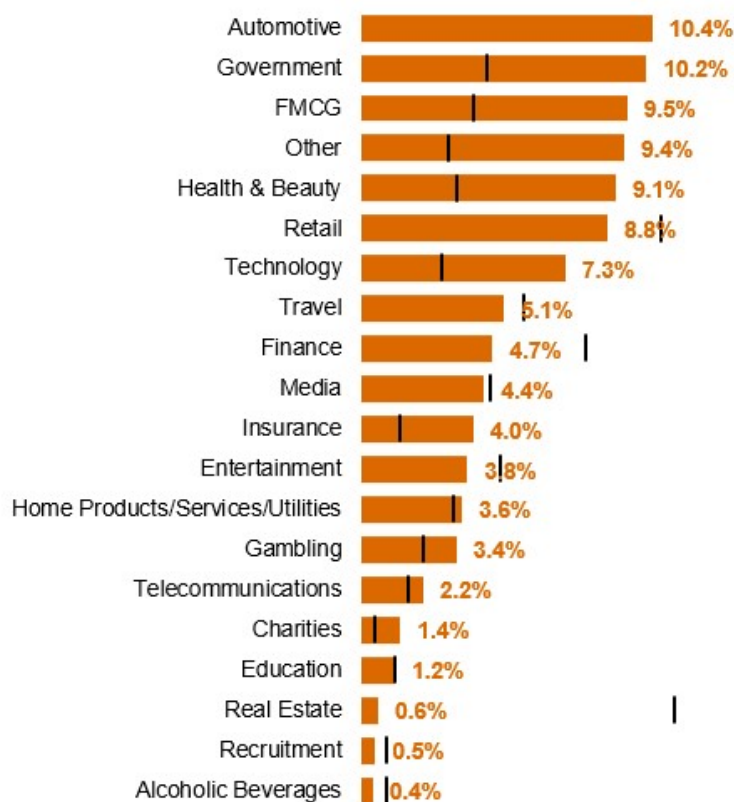
- General Display industry category shares in the June 2019 Quarter
- ∣ General Display industry category shares in the March 2019 Quarter (restated)

### Automotive and government grow their share of video advertising

Automotive grew its share of video advertising in the June 2019 quarter, representing the greatest share of reported general display video advertising. FMCG (Fast Moving Consumer Goods) was previously the dominant industry category.

Government’s investment in video advertising grew significantly in the quarter, consistent with their overall general display spend. As a result, government’s share of the reported video advertising market grew by 4.2% from 6.0% in the March 2019 quarter to 10.2%.

**Figure 36: General Display – Video industry category share compared to total General Display industry category share, June quarter 2019**



- Video Display industry category shares in the June 2019 quarter
- | General Display industry category shares in the June 2019 quarter

## Classifieds Advertising Expenditure – Three months ended 30 June 2019

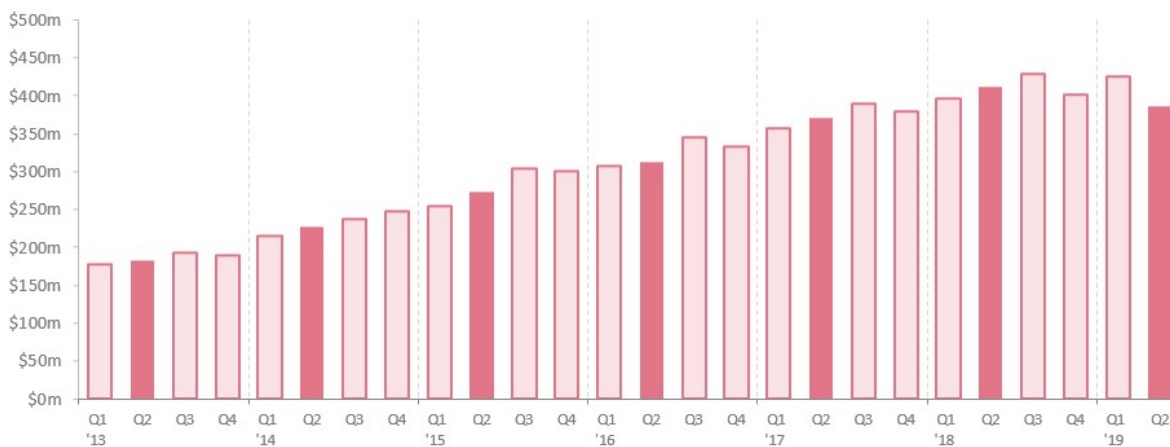
### Classifieds spend is impacted by declines in consumer sentiment

Total online advertising expenditure for Classifieds advertising in the June quarter 2019 was \$386.9 million, a decrease of -9.2% on the March 2019 quarter and -5.9% on the prior June quarter.

These figures are based on participants' data and estimates for LinkedIn's recruitment classifieds revenue through their Talent Solutions product.

Real Estate continues to be the leading category for Classifieds in the June quarter 2019 followed by Recruitment, then Automotive. This is consistent with the previous quarterly report.

**Figure 37: Total Classifieds advertising expenditure, by quarter**



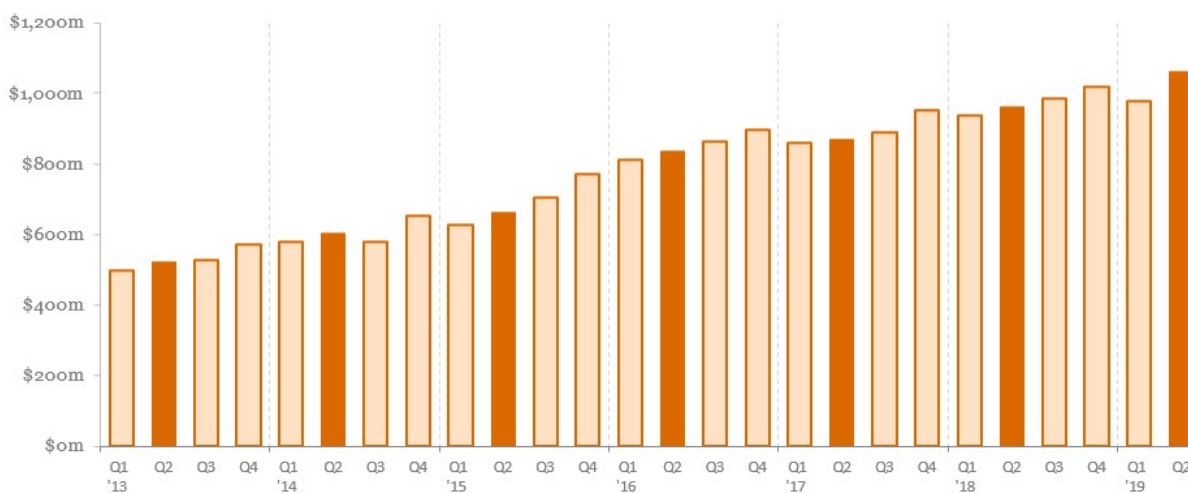
Note: New estimates for LinkedIn's recruitment classifieds revenues were introduced in the September quarter 2014 and accordingly, growth trends may be affected at the point of change in methodology. Refer to the Appendix for more detail and historical quarterly data.

## Search and Directories Advertising Expenditure – Three months ended 30 June 2019

### Search and Directories expenditure reaches record levels

Total online advertising expenditure for Search and Directories for the June quarter 2019 was \$1,059.9 million, an increase of 8.4% on the March 2019 quarter and 10.3% on the prior June quarter. Mobile search continues to be a key factor in driving growth in this segment. Search and Directories continues to lead online advertising expenditure in terms of segment share.

**Figure 38: Total Search and Directories advertising expenditure, by quarter**



Note: Over the period since data has been collected, four different methodologies have been adopted and accordingly, growth trends may be effected at the point of change in methodology. Refer to the Appendix for more detail and historical quarterly data.

*Appendices*

*Glossary*

*Contributors / About Us*

# Appendix A – Historical Data

## Overall Market – Quarterly historical expenditure data

Note: Numbers may not add due to rounding. Percentage changes are calculated based on raw data and may differ from the percentage changes implied by the rounded expenditure numbers presented in the table.

Period	General Display	Classifieds	Search and Directories	Total	Growth	
	\$m	\$m	\$m	\$m	Qtr / Qtr	Year / Year
Jun Qtr 19	863.6	386.9	1,059.9	2,310.4	4.9%	5.0%
Mar Qtr 19	799.0	426.2	977.6	2,202.8	-4.3%	4.9%
Dec Qtr 18	881.8	401.8	1,017.5	2,301.1	2.9%	5.7%
Sept Qtr 18	822.8	429.7	983.2	2,235.7	1.6%	13.2%
Jun Qtr 18	827.7	411.2	960.9	2,199.8	4.7%	15.2%
Mar Qtr 18	767.2	397.3	936.6	2,101.1	-3.5%	13.2%
Dec Qtr 17	843.4	379.2	953.5	2,176.1	10.2%	10.5%
Sept Qtr 17	696.5	390.2	888.6	1,975.3	3.4%	4.9%
Jun Qtr 17	670.6	371.0	867.9	1,909.5	2.9%	5.2%
Mar Qtr 17	637.8	357.4	860.7	1,855.9	-5.8%	7.2%
Dec Qtr 16	738.8	333.6	896.7	1,969.1	4.6%	15.3%
Sept Qtr 16	673.3	345.4	863.9	1,882.6	3.7%	20.3%
Jun Qtr 16	664.5	312.9	837.2	1,814.7	4.9%	25.6%
Mar Qtr 16	610.4	308.4	811.8	1,730.6	1.3%	33.5%
Dec Qtr 15	637.6	301.0	769.7	1,708.3	9.2%	27.9%
Sept Qtr 15	556.6	304.5	703.6	1,564.7	8.3%	32.7%
Jun Qtr 15	510.0	273.9	661.1	1,445.0	11.5%	21.9%
Mar Qtr 15	416.1	255.3	625.1	1,296.5	-3.0%	18.1%
Dec Qtr 14	434.7	247.7	653.5	1,336.0	13.3%	22.9%
Sept Qtr 14	361.8	237.9	579.9	1,179.5	-0.5%	16.0%
Jun Qtr 14	355.3	227.8	602.3	1,185.4	8.0%	22.0%
Mar Qtr 14	301.3	215.8	580.4	1,097.5	1.0%	20.5%
Dec Qtr 13	327.4	189.3	570.4	1,087.1	6.9%	20.9%
Sept Qtr 13	295.6	193.7	527.4	1,016.7	4.6%	25.0%
June Qtr 13	265.6	183.3	523.0	971.9	6.7%	15.7%
Mar Qtr 13	236.4	177.2	497.2	910.8	1.3%	15.3%
Dec Qtr 12	242.3	172.3	484.8	899.3	10.6%	17.7%
Sept Qtr 12	209.5	173.8	430.0	813.3	-3.2%	9.6%
June Qtr 12	223.0	163.1	454.0	840.0	6.3%	21.8%
March Qtr 12	201.4	163.5	425.2	790.0	3.4%	25.2%
Dec Qtr 11	221.7	155.5	386.8	763.9	3.0%	15.5%
Sept Qtr 11	206.9	161.0	374.1	742.0	7.6%	22.7%
June Qtr 11	200.1	153.5	336.3	689.8	9.3%	24.9%
March Qtr 11	165.2	145.3	320.5	630.9	-4.6%	23.1%
Dec Qtr 10	201.8	140.3	319.7	661.7	9.5%	29.1%
Sept Qtr 10	177.4	140.5	286.6	604.5	9.4%	29.6%
June Qtr 10	158.8	128.5	265.3	552.5	7.8%	22.0%
March Qtr 10	126.0	121.8	264.8	512.5	0.0%	16.6%
Dec Qtr 09	141.8	111.3	259.5	512.5	9.9%	10.9%
Sept Qtr 09	120.8	108.3	237.3	466.3	2.9%	3.3%
June Qtr 09	126.0	104.5	222.5	453.0	3.1%	9.8%
March Qtr 09	109.5	105.0	225.0	439.5	-4.9%	14.3%
Dec Qtr 08	130.0	108.0	224.0	462.0	2.4%	22.0%
Sept Qtr 08	125.5	113.8	212.0	451.3	9.4%	29.8%
June Qtr 08	114.5	111.0	187.0	412.5	7.3%	26.7%

### Overall Market – yearly historical expenditure data

Note: Numbers may not add due to rounding. Percentage changes are calculated based on raw data and may differ from the percentage changes implied by the rounded expenditure numbers presented in the table.

<b>Period</b>	<b>General Display \$m</b>	<b>Classifieds \$m</b>	<b>Search &amp; Directories \$m</b>	<b>Total \$m</b>	<b>Growth Year / Year</b>
FY2019	3,367.2	1,644.6	4,038.2	9,050.0	7.1%
FY2018	3,134.8	1,577.9	3,739.6	8,452.3	11.0%
FY2017	2,720.5	1,407.4	3,489.2	7,617.1	11.7%
FY2016	2,469.1	1,226.8	3,122.3	6,818.3	29.7%
FY2015	1,722.6	1,014.8	2,519.6	5,257.0	19.8%
FY2014	1,279.6	826.6	2,280.5	4,386.7	22.0%
FY2013	953.8	706.6	1,935.0	3,595.3	14.6%
FY2012	853.0	643.1	1,640.1	3,135.9	21.2%
FY2011	744.5	579.6	1,263.1	2,586.9	26.6%
FY2010	547.4	469.9	1,026.9	2,043.8	5.1%

### General Display Advertising Expenditure – Advertiser Industry Category

The table below shows the percentage market share for all advertising industry categories in General Display advertising for the last 4 years.

Advertiser Industry Category	Jun 14	Sep 14	Dec 14	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sept 17	Dec 17	Mar 18	Jun 18	Sept 18	Dec 18	Mar 19	June 19	Trend 2015-2019
Alcoholic Beverages	1.2%	1.5%	1.5%	1.4%	0.6%	0.9%	0.8%	1.0%	0.2%	0.4%	0.9%	0.9%	0.8%	0.8%	0.9%	1.0%	0.8%	
Telecommunications	6.4%	4.4%	3.4%	3.2%	3.1%	3.5%	3.4%	2.1%	3.3%	6.5%	2.5%	1.6%	3.3%	1.8%	1.9%	1.0%	2.3%	
Charities	1.1%	0.9%	0.7%	0.5%	0.8%	0.5%	0.6%	0.7%	0.2%	0.8%	0.6%	0.6%	0.5%	0.5%	0.3%	0.5%	0.6%	
Technology	2.7%	2.4%	3.5%	3.3%	2.0%	2.0%	3.6%	2.8%	2.2%	1.6%	2.1%	1.0%	2.2%	2.9%	2.9%	2.5%	3.3%	
Education	1.9%	2.4%	2.0%	1.3%	1.2%	1.7%	1.5%	1.5%	0.8%	1.6%	1.6%	1.4%	1.8%	1.2%	1.2%	1.5%	1.1%	
Entertainment	6.9%	9.7%	9.0%	8.4%	7.1%	9.2%	7.3%	6.6%	8.5%	6.0%	6.0%	3.8%	3.1%	5.0%	5.2%	4.5%	5.2%	
Finance	8.8%	8.0%	9.2%	7.9%	7.9%	7.4%	6.3%	6.9%	5.8%	8.1%	6.4%	5.5%	6.4%	7.7%	7.8%	8.5%	7.9%	
FMCG	5.3%	6.3%	5.1%	7.3%	8.2%	8.2%	6.0%	5.1%	7.8%	5.2%	4.5%	4.4%	4.1%	3.9%	4.1%	4.2%	4.0%	
Government	3.9%	2.4%	2.5%	3.2%	5.3%	2.8%	1.9%	3.0%	1.9%	1.9%	3.3%	3.2%	4.4%	3.3%	3.2%	5.1%	6.7%	
Home Products / Services / Utilities	1.1%	1.3%	2.2%	1.1%	1.6%	1.4%	1.6%	1.7%	1.1%	1.8%	2.9%	2.8%	3.6%	4.7%	2.7%	3.1%	2.8%	
Health & Beauty	4.1%	4.3%	4.3%	2.8%	2.9%	3.2%	2.5%	2.4%	1.1%	3.6%	3.7%	2.9%	3.7%	2.8%	3.6%	3.9%	3.2%	
Insurance	2.8%	2.2%	1.8%	2.6%	2.5%	3.1%	1.8%	2.1%	0.9%	5.0%	2.9%	2.1%	2.0%	1.1%	0.8%	2.0%	1.7%	
Media	2.9%	3.3%	2.9%	3.2%	4.1%	3.2%	4.0%	3.6%	1.6%	2.9%	3.6%	6.3%	4.4%	4.0%	4.8%	5.5%	4.0%	
Automotive	17.4%	17.1%	16.0%	17.2%	17.8%	20.2%	17.0%	20.3%	28.9%	23.6%	21.0%	29.0%	25.2%	25.0%	23.7%	25.1%	25.1%	
Real Estate	11.3%	12.8%	12.5%	14.0%	13.6%	8.8%	14.8%	12.1%	5.2%	11.1%	16.9%	11.8%	14.2%	14.4%	15.0%	8.8%	6.2%	
Recruitment	0.6%	0.5%	0.5%	0.9%	0.7%	0.6%	0.6%	1.5%	0.2%	0.7%	0.9%	0.7%	0.9%	0.9%	0.7%	0.9%	1.2%	
Retail	8.5%	9.5%	13.5%	9.3%	9.2%	11.1%	11.9%	10.1%	3.6%	11.5%	14.4%	11.5%	12.3%	10.8%	12.7%	9.1%	10.0%	
Travel	6.2%	4.4%	4.3%	6.3%	4.6%	5.2%	3.8%	6.4%	8.0%	4.3%	3.8%	4.5%	3.4%	4.1%	6.0%	5.7%	7.3%	
Gambling	**	**	**	**	**	**	**	**	0.4%	1.5%	1.1%	1.4%	2.2%	2.6%	1.5%	2.6%	2.3%	
Other	7.1%	6.6%	5.1%	6.2%	7.0%	6.4%	10.8%	10.3%	14.1%	1.8%	1.0%	4.8%	1.4%	2.3%	1.1%	4.7%	4.3%	

The contributor base for the industry category data has changed. As a result historical market shares have been restated from September 2017 to provide a like for like comparison.

Note: Numbers may not add to 100% due to rounding. DSPs and sales to resellers are not included in the table above.

\*\* - The Gambling category was introduced in the June 2017 quarter. This expenditure was previously captured in the "Other" category.

### General Display Advertising Expenditure – Advertiser Industry Category, quarterly historical

Advertiser Industry Category	Jun Quarter 2019 % Share	Mar Quarter 2019 % Share	Percentage point change
Alcoholic Beverages	0.8%	1.0%	-0.2%
Automotive	25.1%	25.1%	0.0%
Charities	0.6%	0.5%	0.1%
Education	1.1%	1.5%	-0.4%
Entertainment	5.2%	4.5%	0.7%
Finance	7.9%	8.5%	-0.6%
FMCG	4.0%	4.2%	-0.2%
Gambling	2.3%	2.6%	-0.3%
Government	6.7%	5.1%	1.6%
Health & Beauty	3.2%	3.9%	-0.7%
Home Products / Services / Utilities	2.8%	3.1%	-0.3%
Insurance	1.7%	2.0%	-0.3%
Media	4.0%	5.5%	-1.5%
Other	4.3%	4.7%	-0.4%
Real Estate	6.2%	8.8%	-2.6%
Recruitment	1.2%	0.9%	0.3%
Retail	10.0%	9.1%	0.9%
Technology	3.3%	2.5%	0.8%
Telecommunications	2.3%	1.0%	1.3%
Travel	7.3%	5.7%	1.6%

Note: Numbers may not add due to rounding. DSPs and sales to resellers are not included in the table above.

### General Display Expenditure – Advertiser Industry Category, yearly historical

Advertiser Industry Category	FY2019 % Share	FY2018 % Share	Percentage point change
Alcoholic Beverages	0.9%	0.7%	0.2%
Automotive	24.7%	24.1%	0.6%
Charities	8.0%	6.7%	1.3%
Education	0.5%	0.6%	-0.1%
Entertainment	1.2%	1.6%	-0.4%
Finance	5.0%	4.9%	0.1%
FMCG	4.0%	4.6%	-0.5%
Gambling	2.2%	1.5%	0.7%
Government	4.5%	3.1%	1.4%
Health & Beauty	3.4%	3.5%	-0.1%
Home Products / Services / Utilities	3.3%	2.8%	0.5%
Insurance	1.4%	3.1%	-1.7%
Media	4.6%	4.1%	0.5%
Other	3.1%	2.0%	1.1%
Real Estate	11.2%	13.7%	-2.5%
Recruitment	0.9%	0.8%	0.1%
Retail	10.7%	12.6%	-1.9%
Technology	2.9%	1.8%	1.1%
Telecommunications	1.7%	3.6%	-1.9%
Travel	5.8%	4.0%	1.8%

Note: Numbers may not add due to rounding. DSPs and sales to resellers are not included in the table above.

# ***Appendix B – Report Scope, Methodology and Format***

## ***Scope***

The Interactive Advertising Bureau (IAB) has engaged PricewaterhouseCoopers (PwC) to establish a comprehensive standard for measuring online advertising expenditures. The IAB OAER is an ongoing IAB mission to provide an accurate barometer of online advertising expenditure growth.

To achieve differentiation from existing estimates and accomplish industry-wide acceptance, key aspects of the OAER include:

- Obtaining data directly from companies earning online advertising expenditures
- Making the OAER as inclusive as possible, encompassing all forms of Internet/online advertising, including web sites, mobile and video advertising including those sold programmatically
- Ensuring and maintaining a confidential process, only releasing aggregate data
- Performing “spot checks” of data submitted by participants to increase the overall integrity of the data.

The online advertising expenditure measured by the OAER is based on amounts charged to the advertiser before any reductions for agency rebates. Therefore, the amount reported is the gross commissionable advertising revenue.

## ***Methodology***

Data capture for the OAER commenced in the March quarter 2002. All reported amounts are made up of participant verified actual data and estimates as disclosed below. Over this period, different approaches have been adopted which impacted reported growth and this should be taken into account when analysing trends. These changes in methodology reflect the IAB’s view of how the interactive advertising market should be reported, given changes in industry participants over time and the availability of alternative data sources to use for estimation. These approaches are summarised below:

The changes in methodology mean growth rates are overstated when comparing September 2014 to prior periods.

## ***Participant data***

Participants in the OAER are required to submit an online advertising expenditure return to PwC at the end of the relevant quarter. PwC compiles the submissions and conducts a review of the reported figures for reasonableness in light of past submissions and general industry trends.

PwC may conduct a “spot check” of information submitted by a participant to confirm the accuracy of the data submitted. A “spot check” may include general queries, enquiries to confirm submission data and that expenditure reported is in accordance with the definition of expenditure being applied in the OAER. Spot checks may also include a sample check of the allocation of expenditure to categories. These checks do not constitute an audit.

To ensure the protection of participants’ data and market share information, industry category breakdowns will only be referred to where at least three or more unrelated participants have contributed to the aggregate.

Due to the dynamic nature of the internet industry, the number of participants in an industry category may change from time to time which may result in the category not being referred to separately in the report. Where new participants contribute data or participants change their method of capturing data, efforts will be made to collect historical data and to update the appropriate comparative data. Adjustments to historical data will only be made once there are three new participants providing data.

### *Estimates*

Given their increasing participation in the General Display and Search markets, estimates for Google display, video, and mobile advertising as well as Facebook display, video and mobile advertising, have been developed and incorporated since September quarter 2010 to the current quarter being reported. LinkedIn is becoming an increasingly larger participant in online advertising, in particular in online classifieds. Estimates for LinkedIn display and classifieds advertising have been developed and included since the September quarter 2014. Estimates for Twitter's general display and mobile revenues have been included since the September quarter 2015 OAER. From the December 2017 quarter, estimates for Snapchat and Spotify display, video and mobile advertising have been included.

PwC develops its estimates through a meta-analysis of company earnings reports, estimates from research firms, reported data from major advertising publishers, and other sources. PwC also conducts interviews with executives at agencies, intermediaries and publishers who provide their opinions on the development of the Australian market. Facebook, Google, Twitter, Snapchat, Spotify and LinkedIn do not disclose revenues based on geography or by product line, therefore these estimates are opinions and no warranty is given that the actual revenues are as stated. The information contained in this report has not been subject to an audit.

Due to the growing market share of mobile advertising, from September 2015 PwC has adjusted its assumptions for estimating Google's search revenues and as a result no longer include search page views in its formula. However, PwC continues to include in its formula reported data such as quarterly revenue changes in like markets such as the US.

### *Format*

The OAER reports Australian online advertising expenditure sourced from 3 broad categories:

- General Display Advertising, which includes revenues from display ads such as banner advertisements of many different sizes and formats, affiliate marketing programmes, partnerships, sponsorships and emails;
- Classifieds Advertising, which includes revenues from ads placed to buy or sell an item or service; and
- Search and Directories Advertising, which includes revenues from online directory and search engine listings.

Mobile Advertising, which includes revenues from smart phones and tablets in both General Display and Search form, and is a subset of these two categories, is also reported.

General Display Advertising is further reported by advertiser industry categories, their share of the total General Advertising pool and by type- video, infeed/content/native, banner and other, spend by device and buying method. Classifieds Advertising also lists the order of the top industry categories for the reporting period. Search and Directories advertising is reported as a single figure due to the limited number of participants in this category.

## **Disclaimer**

### **Scope**

PricewaterhouseCoopers (“PwC” or “we”) prepared this report solely for the Interactive Advertising Bureau (IAB)’s use and benefit in accordance with and for the purpose set out in the engagement letter with IAB dated 29 August 2019 (“Agreement”) and Appendix B of this report. In doing so, we acted exclusively for IAB and considered no-one else’s interests.

Our engagement did not constitute an audit in accordance with Australian Auditing Standards or a review in accordance with Australian Auditing Standards applicable to review engagements and accordingly no such assurance is provided in this report.

### **Restriction on the use and distribution of our report**

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To the extent permitted by law, we accept no responsibility, duty or liability for any consequence of any use of or reliance of the report by anyone other than IAB and for any use by IAB other than for the purpose set out above.

We make no representation concerning the appropriateness of this report for anyone other than IAB. If anyone other than IAB chooses to use or rely on it they do so at their own risk.

We are not obliged to provide any additional information or update anything in this report, even if matters come to our attention which are inconsistent with its contents.

Notwithstanding the above, IAB is permitted to disclose this report to its members provided that before receiving this report the members agree:

1. this report is strictly confidential and not to disclose this report, except where required by law;
2. the members use the report at their own risk and have no recourse to PwC in connection with it; and
3. we accept no duty, responsibility or liability to the members in connection with this report.

This disclaimer applies:

- to the maximum extent permitted by law and, without limitation, to liability arising in negligence or under statute; and
- even if we consent to anyone other than IAB receiving or using this report.

### **Limited Liability**

Liability limited by a scheme approved under Professional Standards Legislation.

## Glossary

### Advertising Expenditure Types

Advertising Term	Description
<b>General Display</b>	Expenditure on advertising such as banner advertisements of many different sizes and formats, affiliate marketing programmes, partnerships, sponsorships, and emails.
<b>Classifieds</b>	Expenditure on ads placed to buy or sell an item or service, or to report an item of information.
<b>Search and Directories</b>	Expenditure from online directory or search engine listings.
<b>Mobile</b>	Expenditure from general display or search engine listings intended to be viewed on a mobile device such as a smart phone or tablet.

Please note: This report does not include any e-commerce or transaction-based expenditure.

### Types of General Display Advertising

Advertising Term	Description
<b>Standard display formats</b>	Static or rich media display ad units (excluding video) including splash screens and interstitials.
<b>Content, native and infeed</b>	Paid branded/sponsored content, native display formats, infeed ad units.
<b>Video</b>	TV-like advertisements that may appear as in-page video commercials or before, during, and/or after a variety of context in a player environment including but not limited to, streaming video, animation, gaming, music video content. This definition includes broadband video commercials that appear in live, archived, and downloadable streaming content.
<b>Other</b>	Email, tenancies, lead generation, streaming audio ads, live reads during podcasts, dynamic ads in podcasts and other. Excludes DAB revenues.

### Types of General Display Advertising- buying formats

Advertising Term	Description
<b>Agency</b>	Inventory booked by a media agency via an IO / non-programmatic method.
<b>Direct</b>	Inventory booked directly by an advertiser.
<b>Programmatic (Guaranteed)</b>	Inventory purchased via a programmatic method with a fixed CPM and guaranteed inventory.
<b>Programmatic (RTB/PMP)</b>	Inventory purchased via a programmatic method with a variable CPM based on real time bidding – can be via exchange or private market place.

## General Display Advertising Industry Categories

Term	Description
<b>Alcoholic Beverages</b>	Any business that is involved with the manufacturing, distribution and sale of any liquid/beverage intended for drinking that contains an intoxicant. This includes beer, wine, spirits and pre-mixed alcoholic products.
<b>Automotive</b>	Any business involved in the manufacturing, marketing, sales and servicing of motor vehicles, which includes cars, trucks, motorbikes and motorised scooters. Includes auto-specific online sites and apps.
<b>Charities</b>	This pertains to community service and charity organisations that provide products and services for the benefit of the community. It includes organisations such as the Salvation Army, Red Nose Day etc.
<b>Education</b>	Any business, organisation or institution in either the private or the government sectors that provides education and training services. This includes any primary, secondary, tertiary educational institutions, adult education centres, colleges, TAFE institutes, correspondence schools and cultural learning centres.
<b>Entertainment</b>	Any business or organisation providing music (live, recorded or published), movies (cinema or home entertainment), games and gaming consoles and other entertainment services e.g. theme parks.
<b>Finance</b>	Any business providing banking products or services for personal or business purposes. Services can include credit card services, loans and wealth management (excluding superannuation). Any business involved in the provision and management of superannuation funds, including public and private companies and industry funds.
<b>FMCG</b>	Any business involved in the production, distribution and sale of foodstuff items which can be considered supermarket goods. Any business involved in the production, distribution and sale of beverage items (excluding alcohol) which can be considered supermarket goods.
<b>Gambling</b>	Any business involved in the wagering of money including online betting and lotteries and the manufacturing of poker machines.
<b>Government</b>	Any organisation providing services for, or on behalf of, a Federal, State or Local government body, agency or department.
<b>Home Products/Services/Utilities</b>	Any business providing products, services and advice relating to home renovations, construction, fittings, furnishings, appliances or utilities.
<b>Health &amp; Beauty</b>	Any business providing products, services and product advice relating to toiletries, cosmetics or pharmaceuticals.
<b>Insurance</b>	Any business involved with consumer related insurance products or services. This includes motor vehicle insurance, house and household contents insurance, life insurance, health insurance, corporate and professional insurance or any other insurance.
<b>Media</b>	Any business involved with the creation and delivery of content for news or entertainment purposes. This includes mediums such as radio, television (either cable or free to air), cinema, publications (such as newspapers, magazines) and online sites and apps.
<b>Real Estate</b>	Any business providing commercial or residential property advice, information and retail services for the sale and management of real estate.
<b>Recruitment</b>	Any business involved with the process of attracting, screening and hiring personnel.

<b>Term</b>	<b>Description</b>
<b>Retail</b>	Any business or organisation involved in the sales of goods directly to the consumer or via a bidding process. This includes department stores, mail order businesses, street vendors and markets and auctions of real estate, motor vehicles, white goods, electrical goods, manufacturing and retail equipment, antiques, furniture and general household items.
<b>Technology</b>	Any business involved with the manufacturing, sale and provision of products and services relating to computer hardware and software (excludes entertainment software).
<b>Telecommunications</b>	Any business involved with the manufacturing, sale and provision of products and services relating to telecommunications products (phones, pagers) and internet services including web hosting.
<b>Travel</b>	Any organisation or business involved in the provision of domestic or international travel services, including accommodation, car hire, flights, tours and travel agent services.
<b>Other</b>	Any business that does not meet the general parameters of any other category.

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## *Contributors*

The IAB Online Advertising Expenditure Report includes financial data from over 1,000 websites and is supported and promoted by the following companies:

carsales.com.au  
CBS Interactive  
Daily Mail Australia  
Domain  
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Multi Channel Network  
News Corp Australia  
Nine  
REA Group  
SBS  
Seven West Media  
SEEK  
SpotX  
Ten  
Verizon Media

We thank them all for their contribution to this industry information.

## ***About the IAB***

The Interactive Advertising Bureau (IAB) Limited is the peak trade association for online advertising in Australia. As one of over 43 IAB offices globally and with a rapidly growing membership, the role of the IAB is to support sustainable and diverse investment in digital advertising across all platforms in Australia.

The IAB Industry Charter, which was announced in October 2018, details the organisation's focus on helping marketers and agencies understand how digital advertising can deliver on their business objectives. Foundation elements of the IAB Industry Charter include a renewed focus on standards that promote trust, steps to reduce friction in the ad supply chain; and ultimately improve ad experiences for consumers, advertisers and publishers.

Beyond the IAB's continued focus on content and ad measurement, the Charter outlines four additional areas of activity: digital ad effectiveness, data and data privacy; standards and guidelines; and improving the digital value chain.

For further information about IAB Australia please visit: [www.iabaustralia.com.au](http://www.iabaustralia.com.au) or contact:

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## ***About PricewaterhouseCoopers***

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