iab nz

Q2 2021
H1 2021
DIGITAL ADVERTISING REVENUE REPORT

bakertilly
STAPLES RODWAY

REPORT CONTENTS

01

EXECUTIVE SUMMARY

1.1 EXECUTIVE SUMMARY Q2 2021

The objective of this report is to provide a clear overview of the New Zealand digital advertising landscape and keep IAB New Zealand members at the forefront of trends to inform and support decision making. In this report, we provide a snapshot of Q2 2021 and H1 2021, along with trends, to provide a contextual overview of the New Zealand digital market.

In Q2 2021, digital revenue reached $445.9 million, with growth of 61% year-on-year, which is the highest recorded year-on-year quarterly growth over the past four years. Classified/Directories topped year-on-year quarterly growth with 72.1%, followed by Search at 68.9% and Total Display at 49.6%. For each of these channels, year-on-year quarterly growth is almost, or the highest ever recorded.

Within Total Display, Audio lead by a substantial margin in Q2 2021, with year-on-year growth of 88% which is one of the highest ever quarters of recorded growth for this channel. Sponsorship and Video followed, again with substantial growth of 73.3% and 53.6% respectively for the quarter. General Display bounced substantially, with growth of 47.5% for the quarter.

Overall, Q2 2021 is another particularly encouraging result for digital.

GILL STEWART, CEO

SEARCH
64.1% OF TOTAL REVENUE
$286.0m in Q2 2021
▲ **Up 69.0%** on Q2 2020

CLASSIFIED/ DIRECTORIES
15.9% OF TOTAL REVENUE
$70.8m in Q2 2021
▲ **Up 72.1%** on Q2 2020

TOTAL DISPLAY
11.5% OF TOTAL REVENUE
$51.1m in Q2 2021
▲ **Up 49.6%** on Q2 2020

SOCIAL
8.5% OF TOTAL REVENUE
$38.1m in Q2 2021
▲ **Up 17.8%** on Q2 2020

TOTAL DIGITAL ADVERTISING REVENUE
$445.9m
in Q2 2021
Up 61.0%
on Q2 2020

NOTE: Total Display includes General Display, Video, Native, Audio and Sponsorship

1.2 EXECUTIVE SUMMARY H1 2021

The objective of this report is to provide a clear overview of the New Zealand digital advertising landscape and keep IAB New Zealand members at the forefront of trends to inform and support decision making. In this report, we provide a snapshot of H1 2021 and Q2 2021, along with trends, to provide a contextual overview of the New Zealand digital market.

In H1 2021, digital revenue reached $846.4 million, with growth of 43.9% year-on-year. Search topped year-on-year half yearly growth with 49.5%, followed by Classified/Directories at 49.2% and Total Display at 35.5%. Similar to Q2 2021, for each of these channels, year-on-year half yearly growth is almost, or the highest ever recorded.

Within Total Display, Audio lead by a substantial margin in H1 2021, with year-on-year growth of 67.3% which is one of the highest ever half yearly growth results for this channel. Sponsorship and Video followed, again with substantial growth of 53.0% and 44.5% respectively for the half year. General Display bounced substantially, with growth of 32.7% for the half year.

Overall, H1 2021 is another particularly encouraging result for digital.

GILL STEWART, CEO

SEARCH
$539.4m in H1 2021
▲ Up 49.5% on H1 2020
63.7% OF TOTAL REVENUE

CLASSIFIED/ DIRECTORIES
$140.6m in H1 2021
▲ Up 49.2% on H1 2020
16.6% OF TOTAL REVENUE

TOTAL DISPLAY
$94.5m in H1 2021
▲ Up 35.5% on H1 2020
11.2% OF TOTAL REVENUE

SOCIAL
$71.9m in H1 2021
▲ Up 13.5% on H1 2020
8.5% OF TOTAL REVENUE

TOTAL DIGITAL ADVERTISING REVENUE
$846.4m
in H1 2021
Up 43.9%
on H1 2020

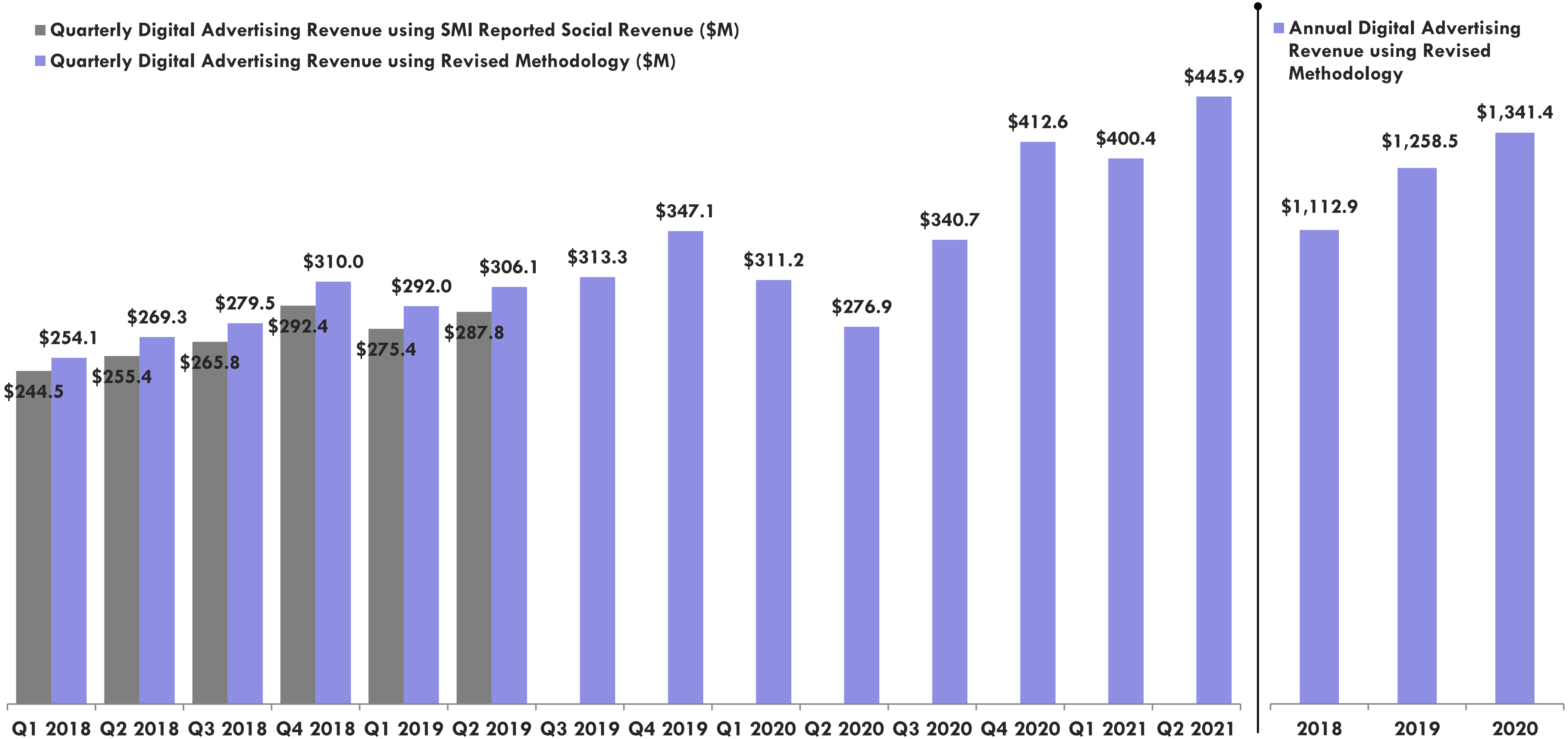
NOTE: Total Display includes General Display, Video, Native, Audio and Sponsorship

1.3 QUARTERLY AND ANNUAL TOTAL DIGITAL ADVERTISING REVENUE ($M)

Q3 2019: IABNZ commenced reporting Social media revenue using revised methodology, which has been retrospectively applied to Q2 2018. Please refer to page 33 for the process for estimating Social revenue.

The following chart retrospectively applies the revised methodology for reporting Social media to historical quarterly total digital advertising revenue and shows comparative data sets.

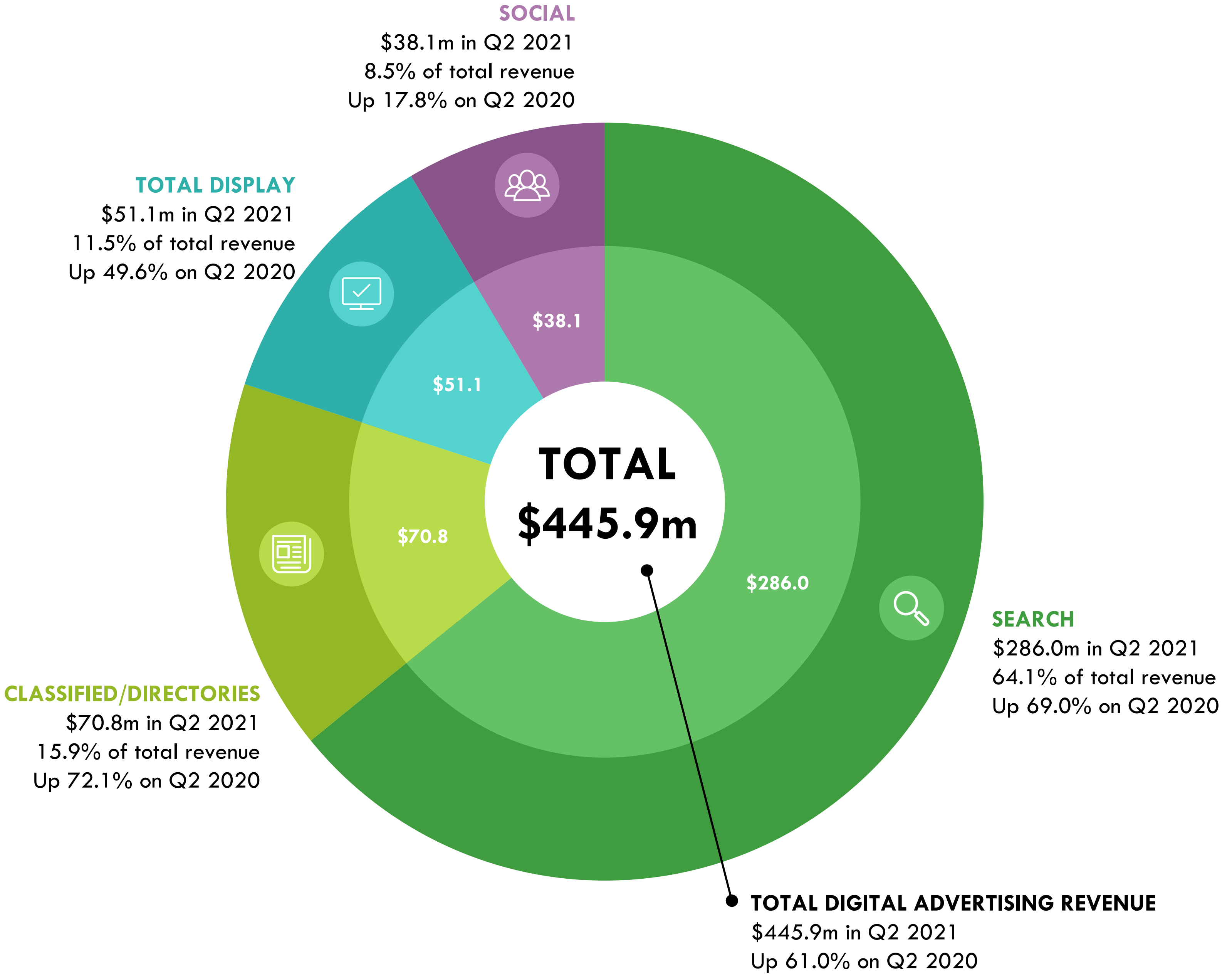
Given that the Nielsen Online Rating Monthly Unique Audience does not include exclusive app usage, we estimate that the Facebook revenue in this report is under-reported by approximately a fifth. Source: Nielsen NZ Connected Consumer Report in 2017 indicated that about one fifth of New Zealand Facebook users exclusively visit Facebook via a mobile app each month (i.e. not using a browser).



02

TOPLINE OVERVIEW

2.1 Q2 2021 CHANNEL REVENUE SUMMARY



Q2 2021 revenue reached $445.9 million, with year-on-year growth of 61.0% on Q2 2020.

Classified/Directories recorded the highest year-on-year growth for the quarter at 72.1% followed by Search at 69.0%.

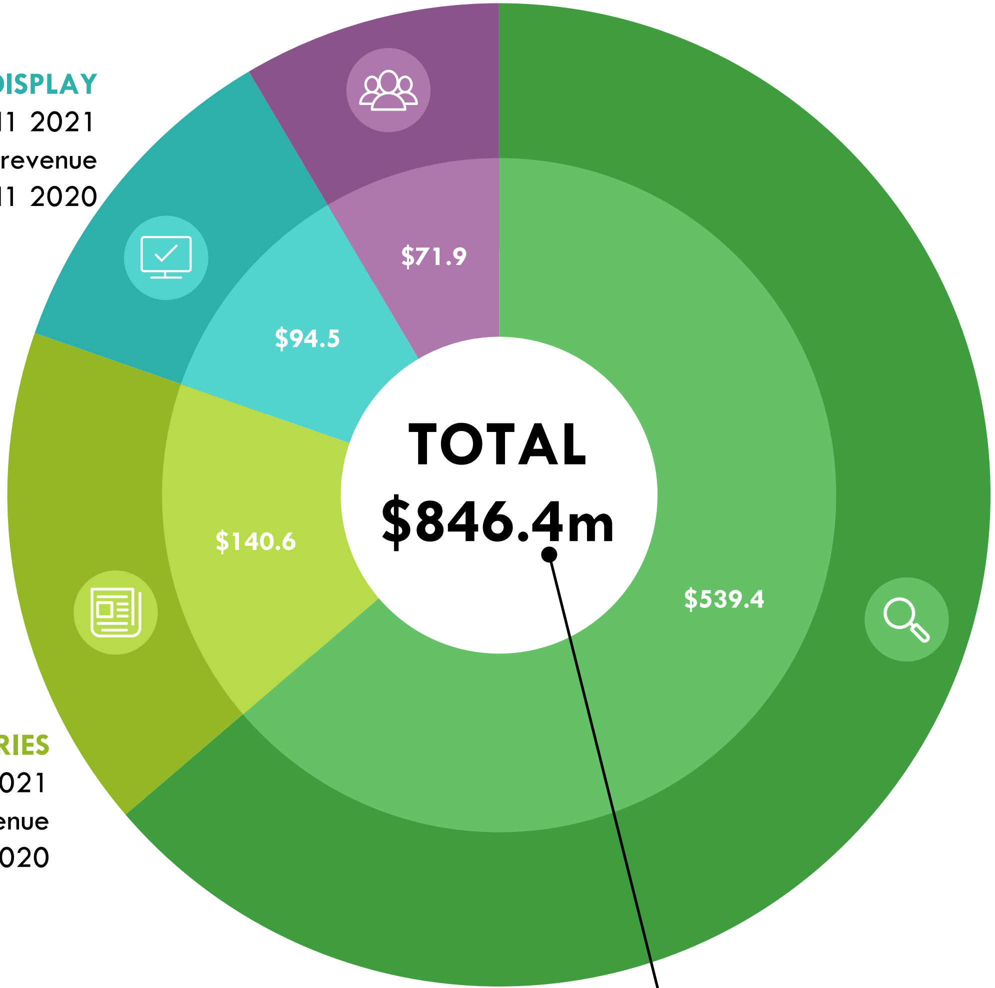
61.0%
YEAR-ON-YEAR GROWTH

NOTE: Total Display includes General Display, Video, Native, Audio and Sponsorship

2.2 H1 2021 CHANNEL REVENUE SUMMARY

SOCIAL
$71.9m in H1 2021
8.5% of total revenue
Up 13.5% on H1 2020

TOTAL DISPLAY
$94.5m in H1 2021
11.2% of total revenue
Up 35.5% on H1 2020



SEARCH
$539.4m in H1 2021
63.7% of total revenue
Up 49.5% on H1 2020

CLASSIFIED/DIRECTORIES
$140.6m in H1 2021
16.6% of total revenue
Up 49.2% on H1 2020

TOTAL DIGITAL ADVERTISING REVENUE
$846.4m in H1 2021
Up 43.9% on H1 2020

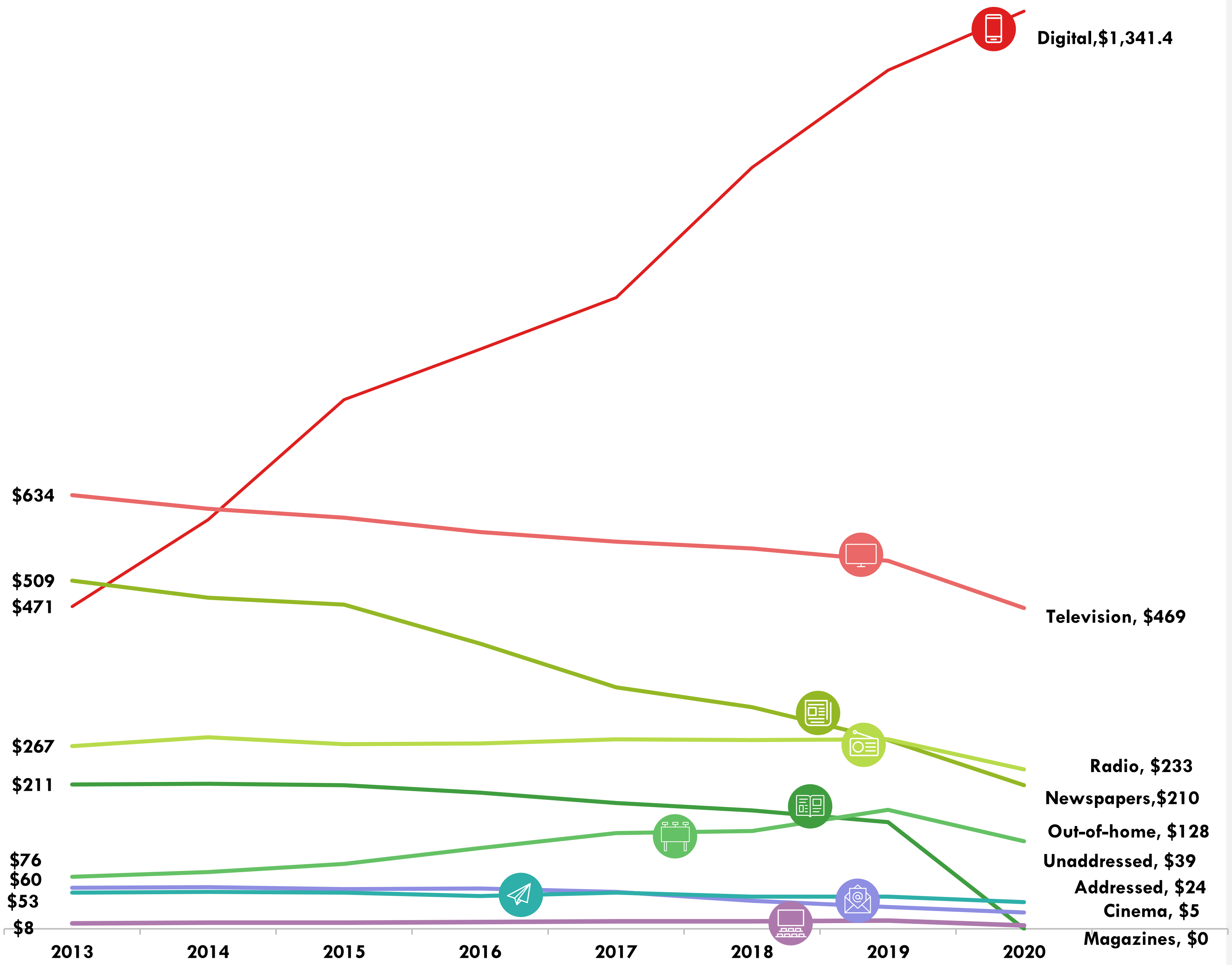
NOTE: Total Display includes General Display, Video, Native, Audio and Sponsorship

H1 2021 revenue reached $846.4 million, with half-yearly growth of 43.9% on H1 2020.

Search recorded the highest year-on-year growth for the year at 49.5% followed by Classifieds/ Directories at 49.2%.

43.9%
HALF YEARLY GROWTH

2.3 TOTAL INDUSTRY REVENUE ($M)



NOTE: Revenue for each media excludes digital, as it is included in total digital revenue

2020 DIGITAL ADVERTISING REVENUE EXCEEDS $1.3 BILLION

Total digital advertising revenue is compared to the ASA New Zealand Media Turnover reports, for the corresponding 12-month periods. This is broken down by individual media.

In March 2021 the ASA New Zealand Media Turnover Report was released for the year 2020; the entire industry declined at the rate of 11.5%. [1][2]

In 2020 digital advertising revenue surpassed $1.3 billion for the first time, growing by 6.6% year-on-year.[3]

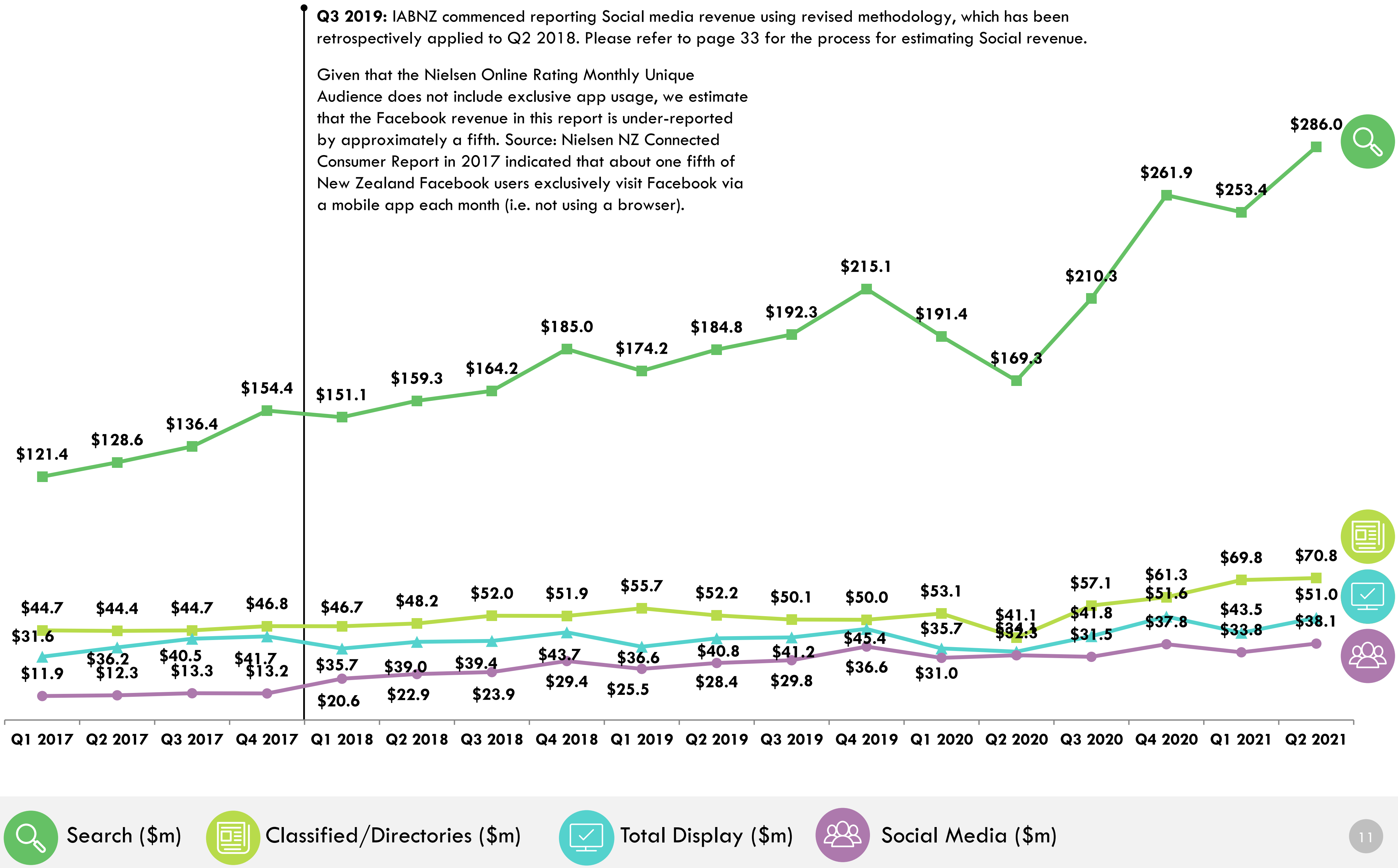
Digital share of total media turnover has increased from 45.5% in 2019 to 54.8% in 2020. [2][1]

Digital revenue continues to grow and cement itself as an increasingly important component of many advertisers' marketing strategies.

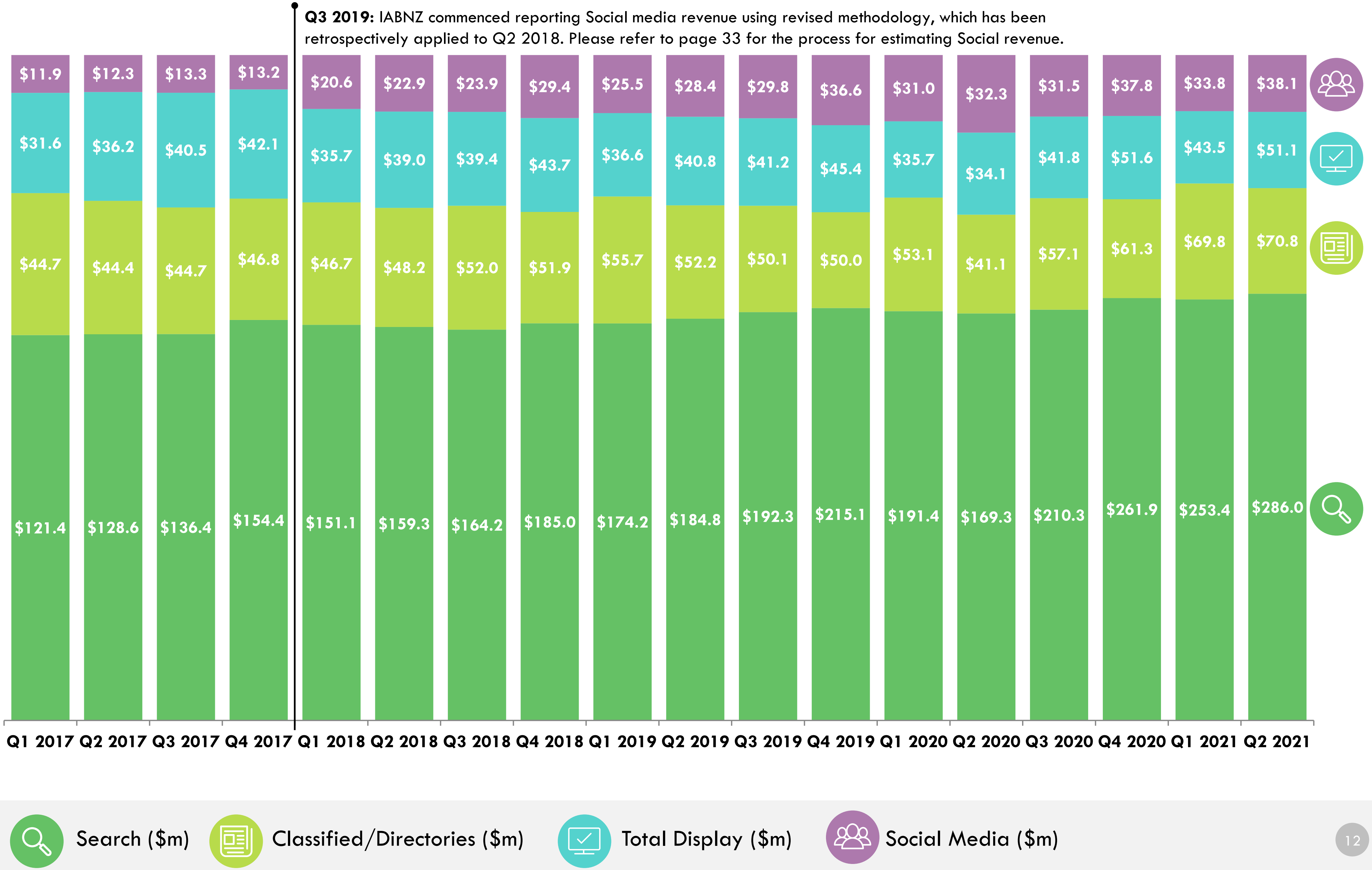
Sources:

(1) ASA New Zealand Media Turnover Report 2020
(2) ASA New Zealand Media Turnover Report 2019
(3) IAB New Zealand Q4 2020/FY 2020 Digital Advertising Revenue Report

2.4 QUARTERLY DIGITAL REVENUE BY CHANNEL ($M)



2.5 QUARTERLY DIGITAL SHARE OF REVENUE BY CHANNEL ($M)



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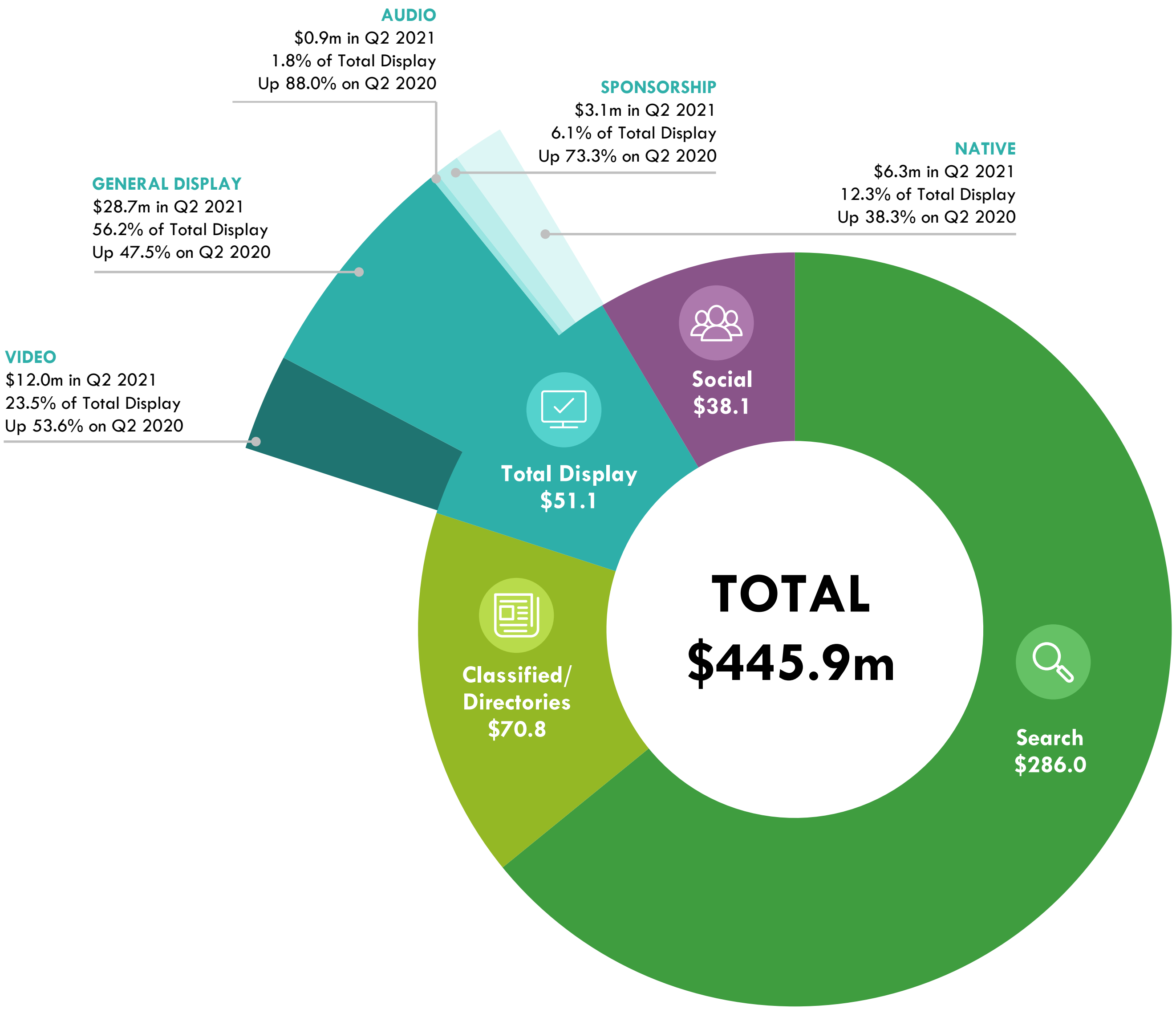
DISPLAY CHANNEL

3.1 Q2 2021 DISPLAY CHANNEL REVENUE SUMMARY



Total Display (all devices) in Q2 2021 reached $51.1 million and represented 11.5% of total digital revenue for Q2 2021.

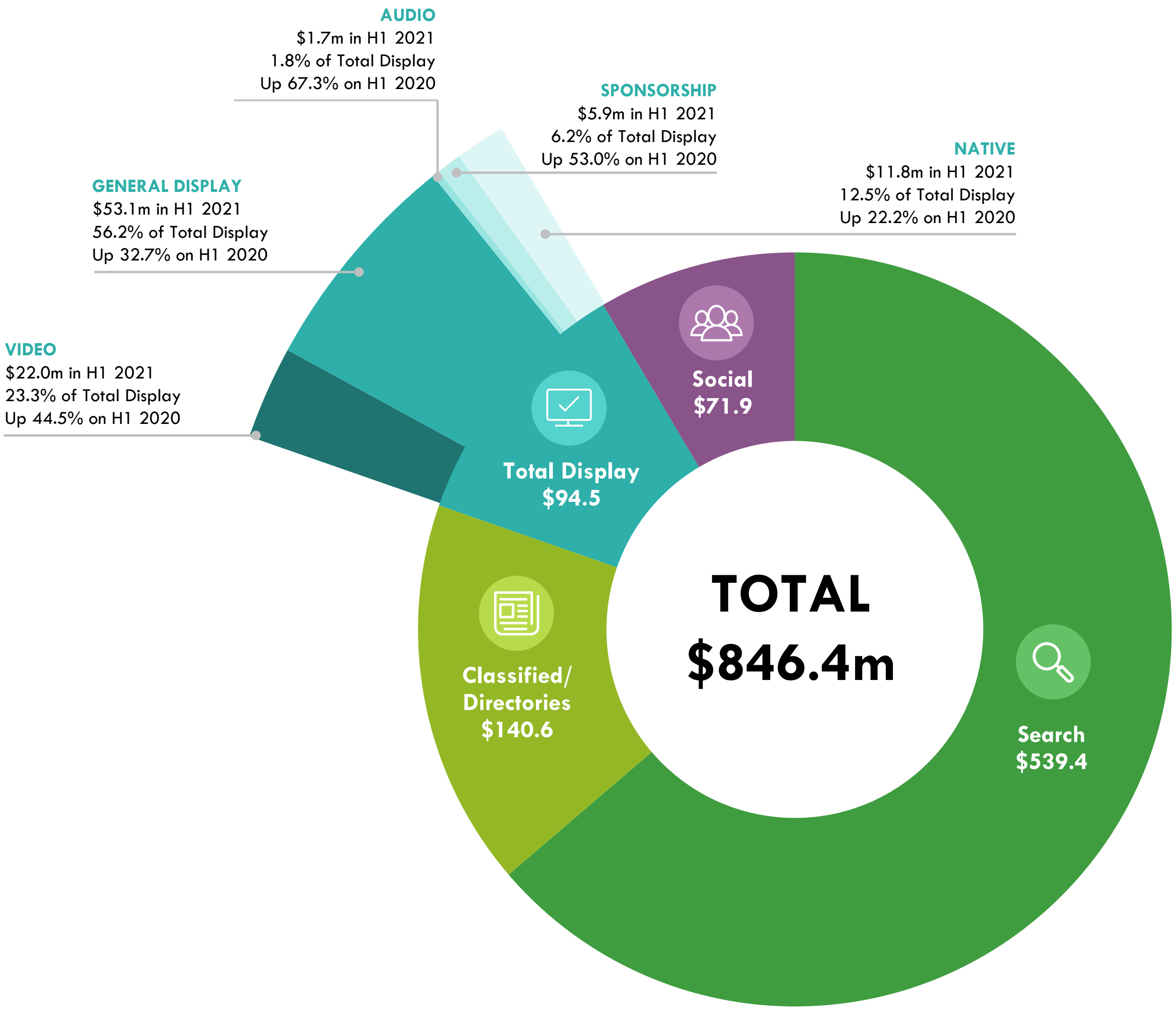
This chart shows channel breakdowns for Total Display into General Display, Video, Native, Audio and Sponsorship, and their percentage of Total Display revenue for Q2 2021.

Q2 2021 growth on the same quarter last year, for Total Display Channels was topped by Audio at 88.0%, followed by Sponsorship and Video at 73.3% and 53.6% respectively.

49.6%

TOTAL DISPLAY GROWTH

3.2 H1 2021 DISPLAY CHANNEL REVENUE SUMMARY



Total Display (all devices) in H1 2021 reached $94.5 million and represented 11.2% of total digital revenue for H1 2021.

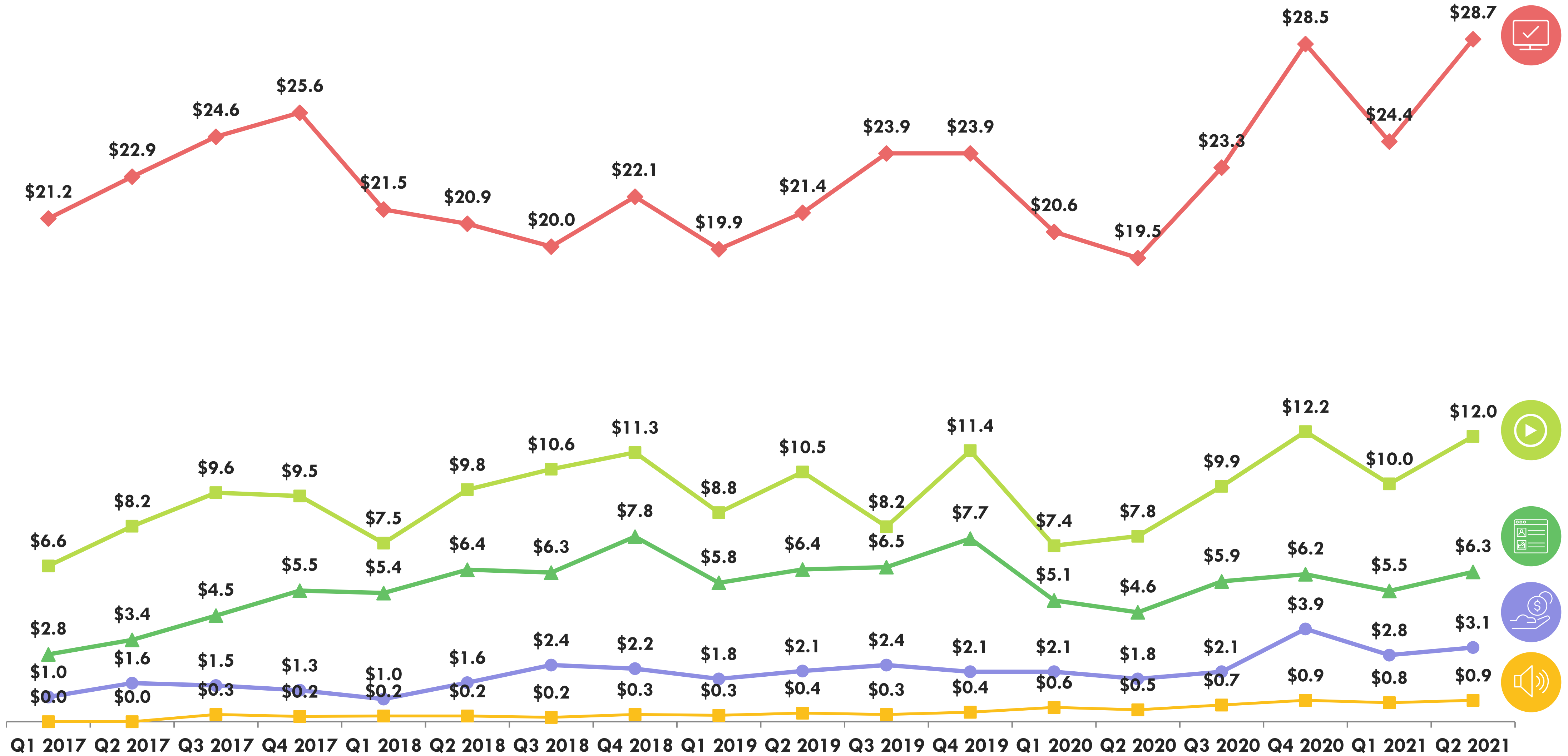
This chart shows channel breakdowns for Total Display into General Display, Video, Native, Audio and Sponsorship, and their percentage of Total Display revenue for H1 2021.

H1 2021 growth on the same period last year, for Total Display Channels was topped by Audio at 67.3%, followed by Sponsorship at 53.0%.

35.5%

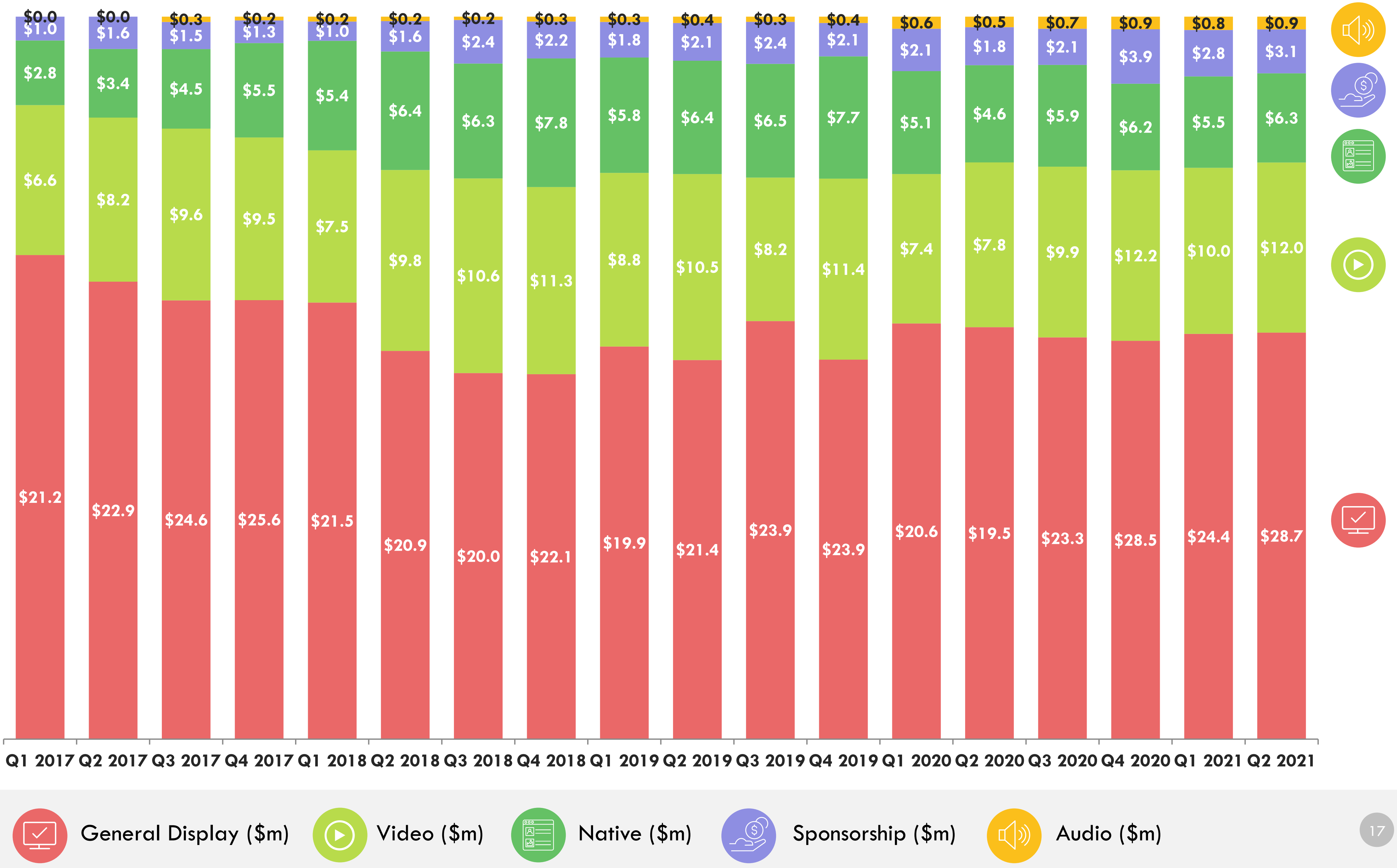
TOTAL DISPLAY GROWTH

3.3 QUARTERLY DISPLAY CHANNEL REVENUE ($M)

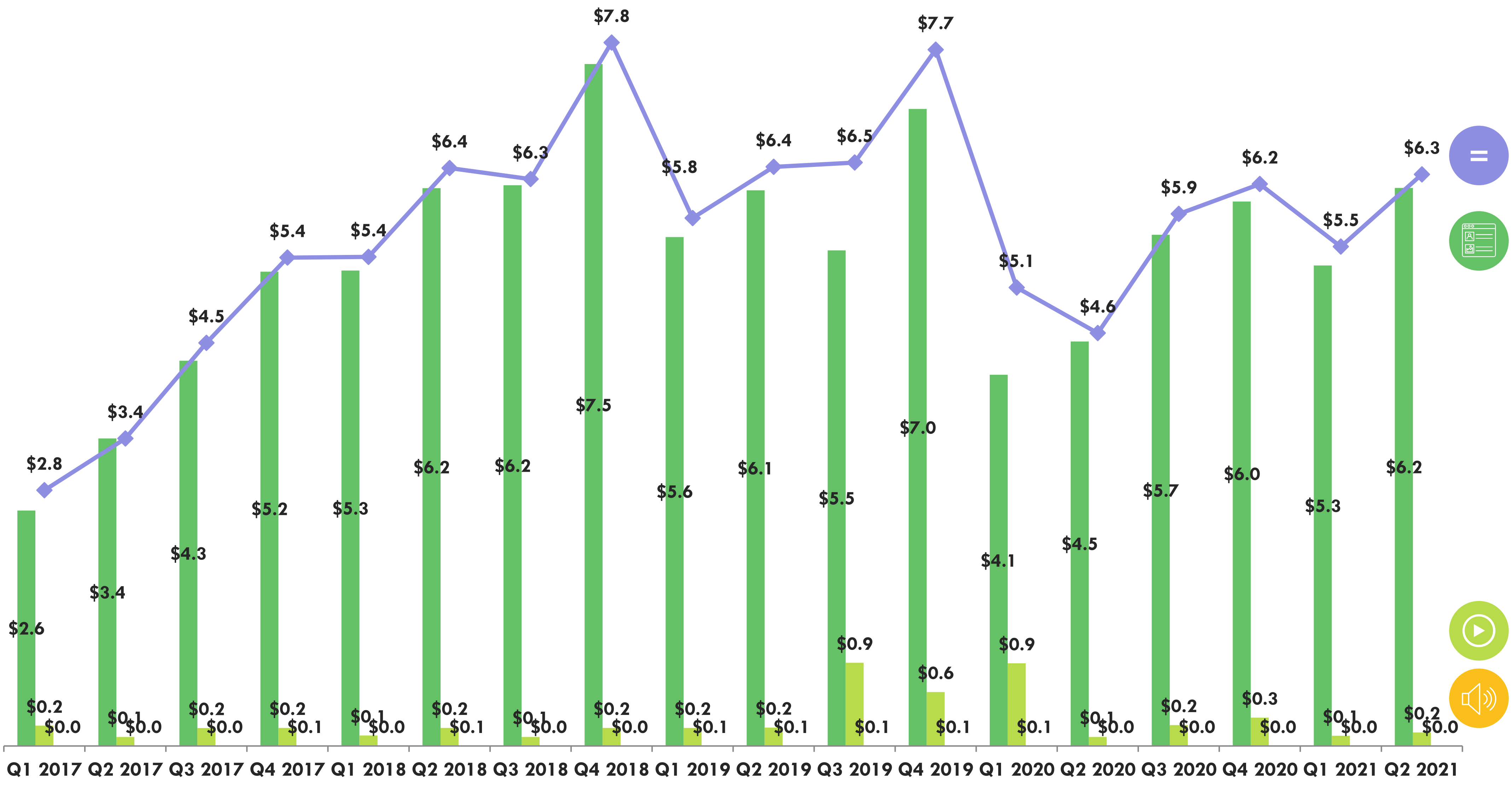


KEY General Display ($m) Video ($m) Native ($m) Sponsorship ($m) Audio ($m)

3.4 QUARTERLY TOTAL DISPLAY SHARE OF REVENUE BY CHANNEL ($M)



3.5 NATIVE REVENUE BREAKDOWN ($M)



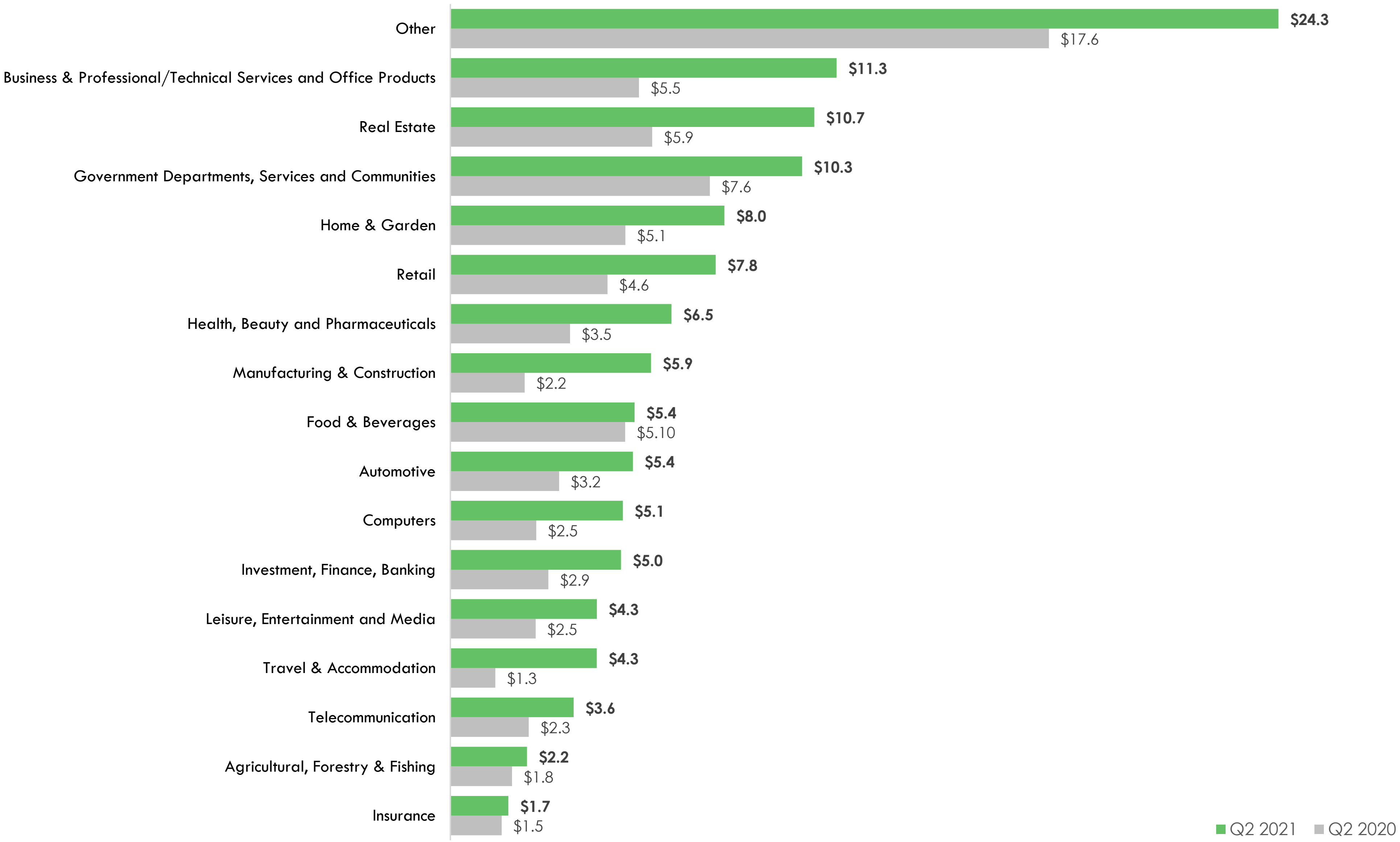
KEY

Total Native ($m) | Native Content ($m) | Native Video ($m) | Native Audio ($m)

Q4

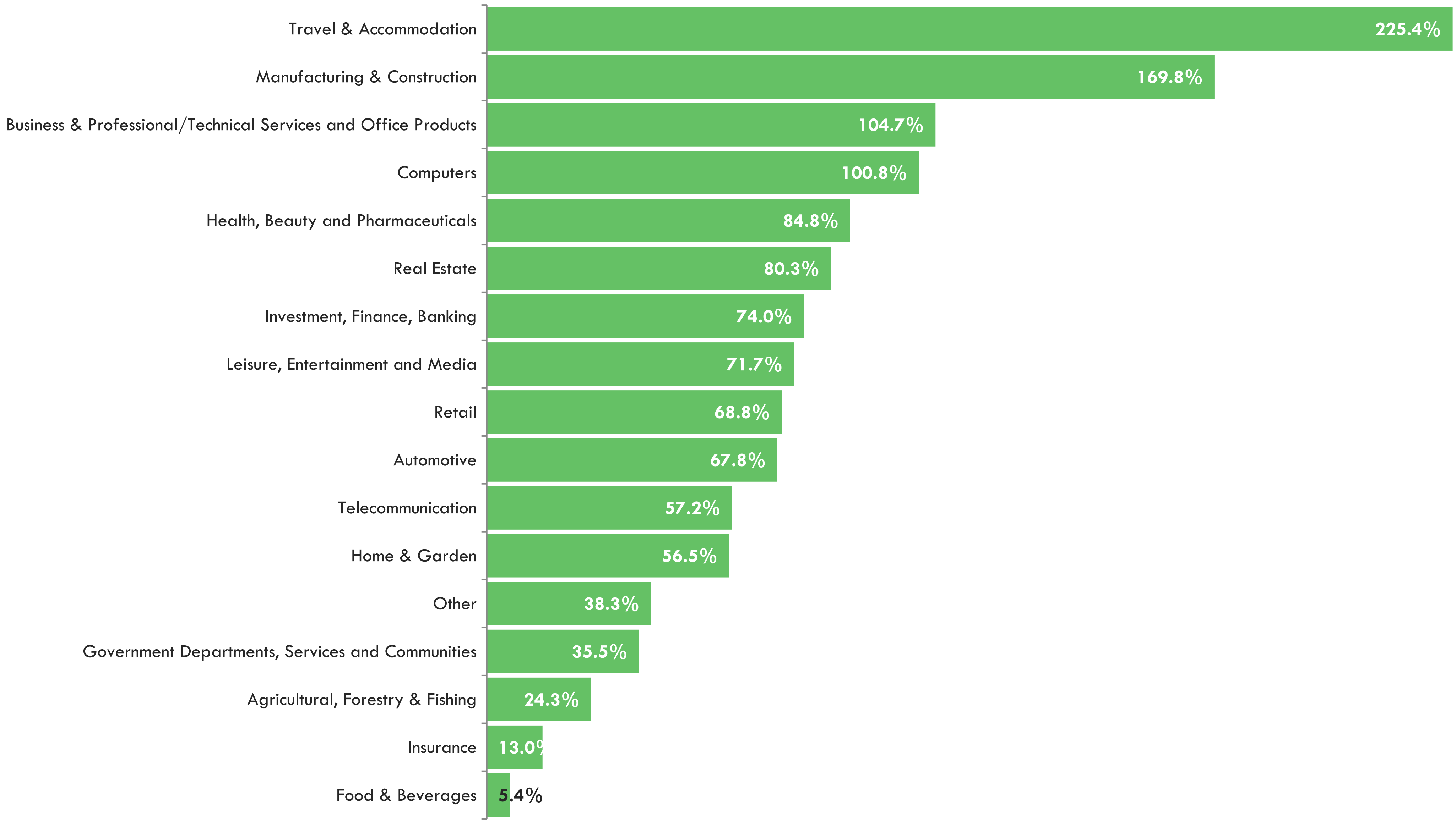
ADVERTISING CATEGORIES

4.1 Q2 2021 REVENUE BY CATEGORY ($M)



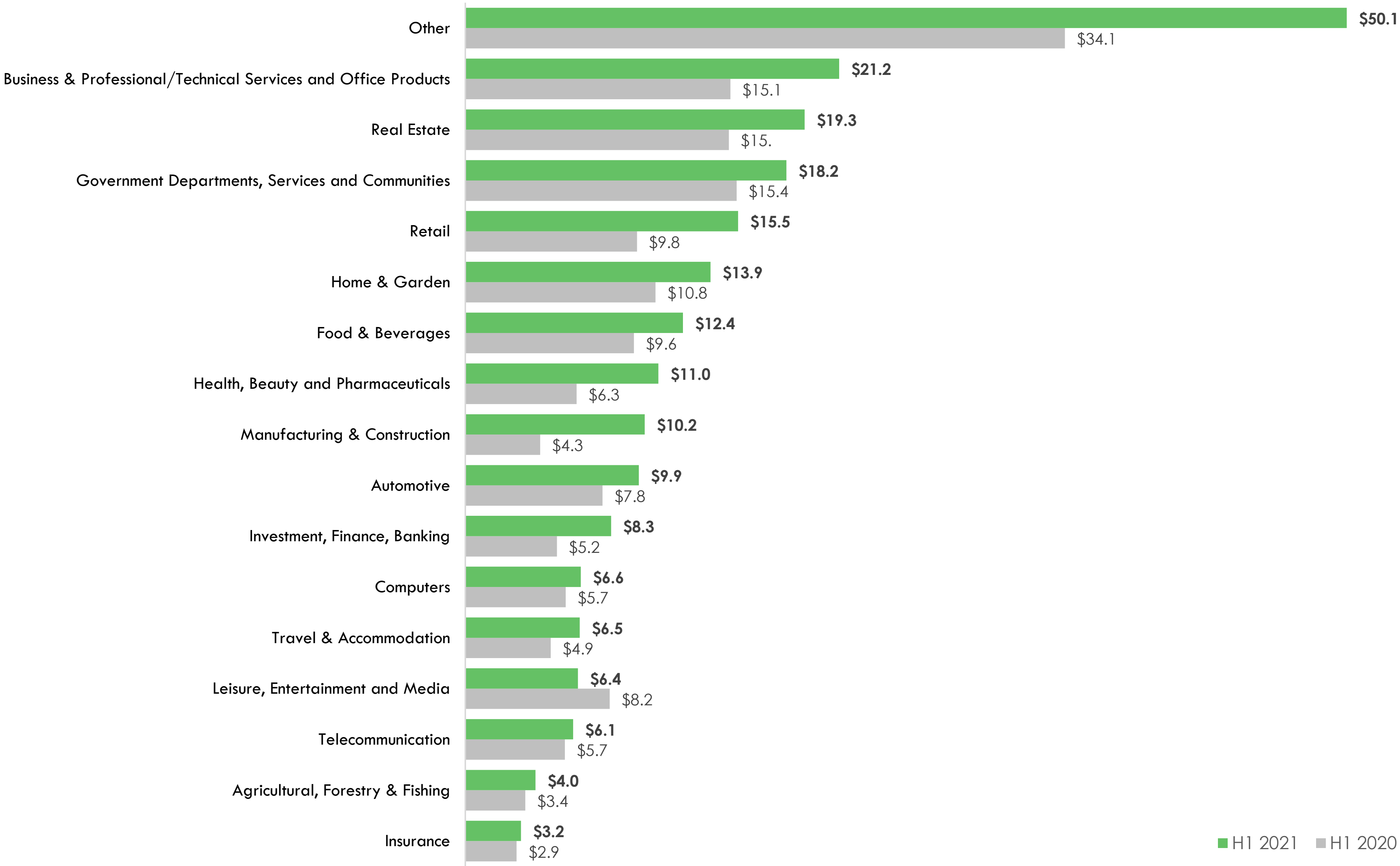
NOTE: Includes General Display, Video, Native, Audio, Sponsorship, Classified and Directories. Excludes Search and Social.

4.2 Q2 2021 YEAR-ON-YEAR VARIANCE BY CATEGORY (%)



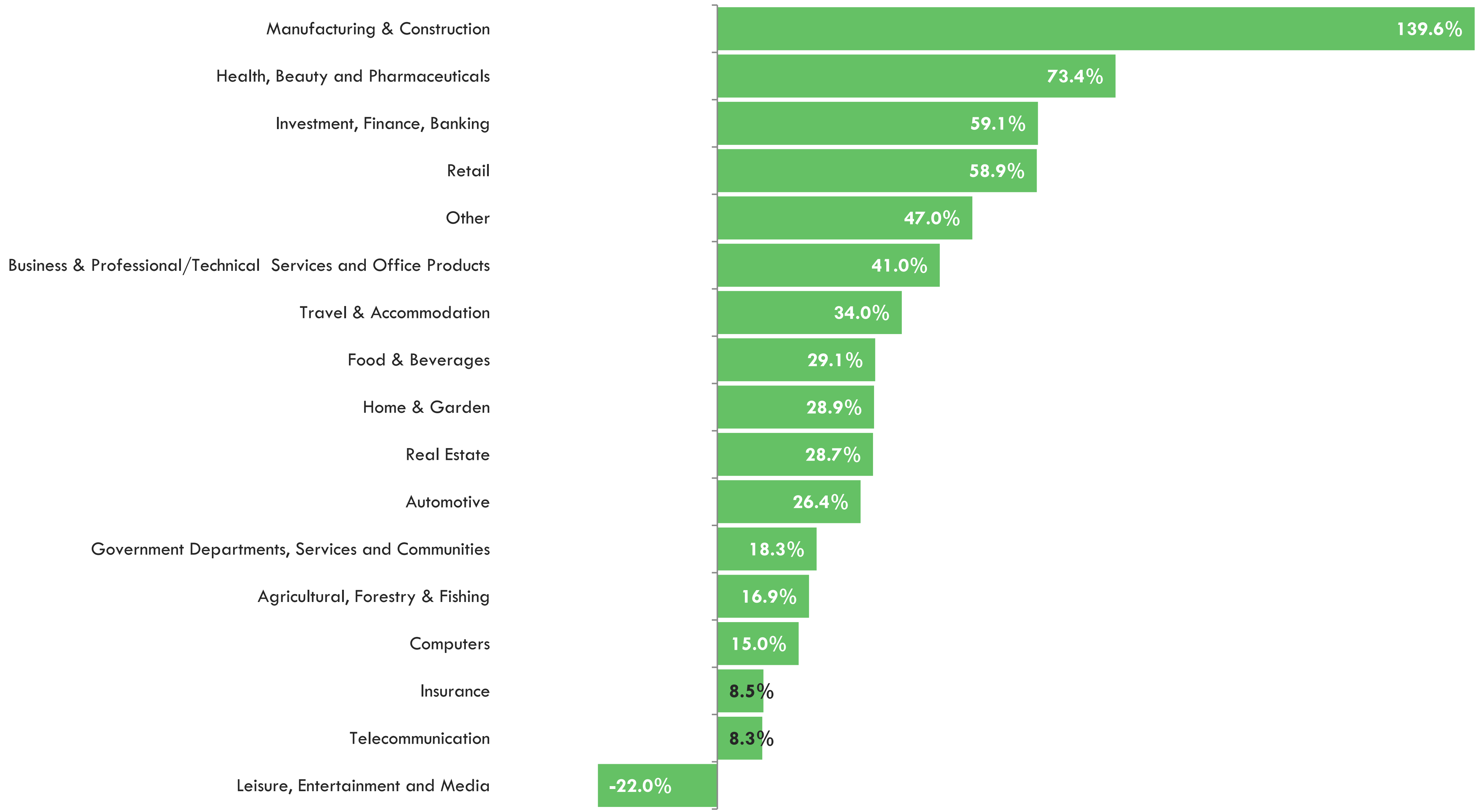
NOTE: Includes General Display, Video, Native, Audio, Sponsorship, Classified and Directories. Excludes Search and Social.

4.3 H1 2021 REVENUE BY CATEGORY ($M)



NOTE: Includes General Display, Video, Native, Audio, Sponsorship, Classified and Directories. Excludes Search and Social.

4.2 H1 2021 YEAR-ON-YEAR VARIANCE BY CATEGORY (%)



NOTE: Includes General Display, Video, Native, Audio, Sponsorship, Classified and Directories. Excludes Search and Social.

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SOCIAL

5.1 QUARTERLY AND ANNUAL SOCIAL MEDIA REVENUE ($M)

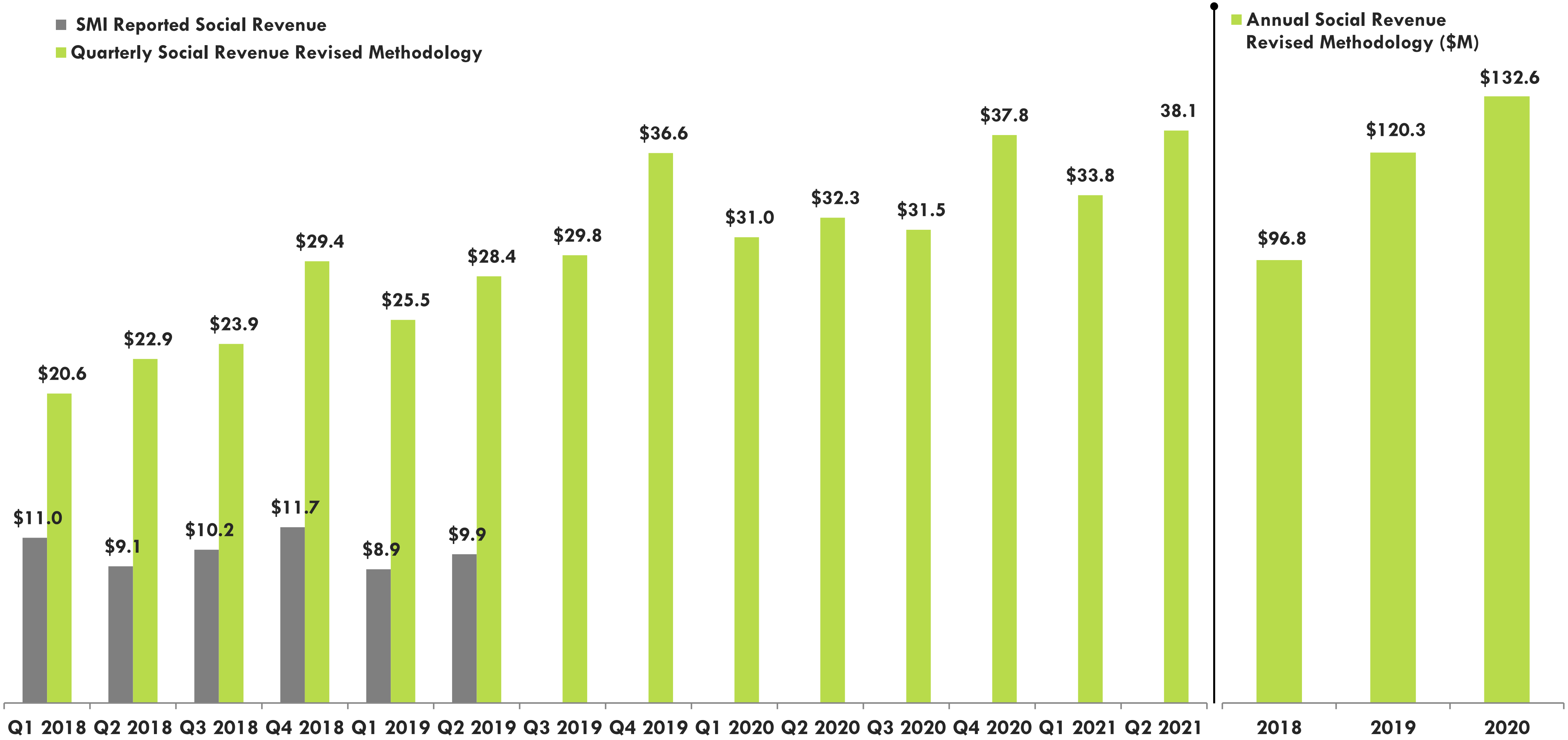
5.1 QUARTERLY AND ANNUAL SOCIAL MEDIA REVENUE ($M)

Q3 2019: IABNZ commenced reporting Social media revenue using revised methodology, which has been retrospectively applied to Q2 2018. Please refer to page 33 for the process for estimating Social revenue.

The following chart retrospectively applies the revised methodology for reporting Social media to historical quarterly Social media revenue and shows comparative data sets.

Given that the Nielsen Online Rating Monthly Unique Audience does not include exclusive app usage, we estimate that the Facebook revenue in this report is under-reported by approximately a fifth.

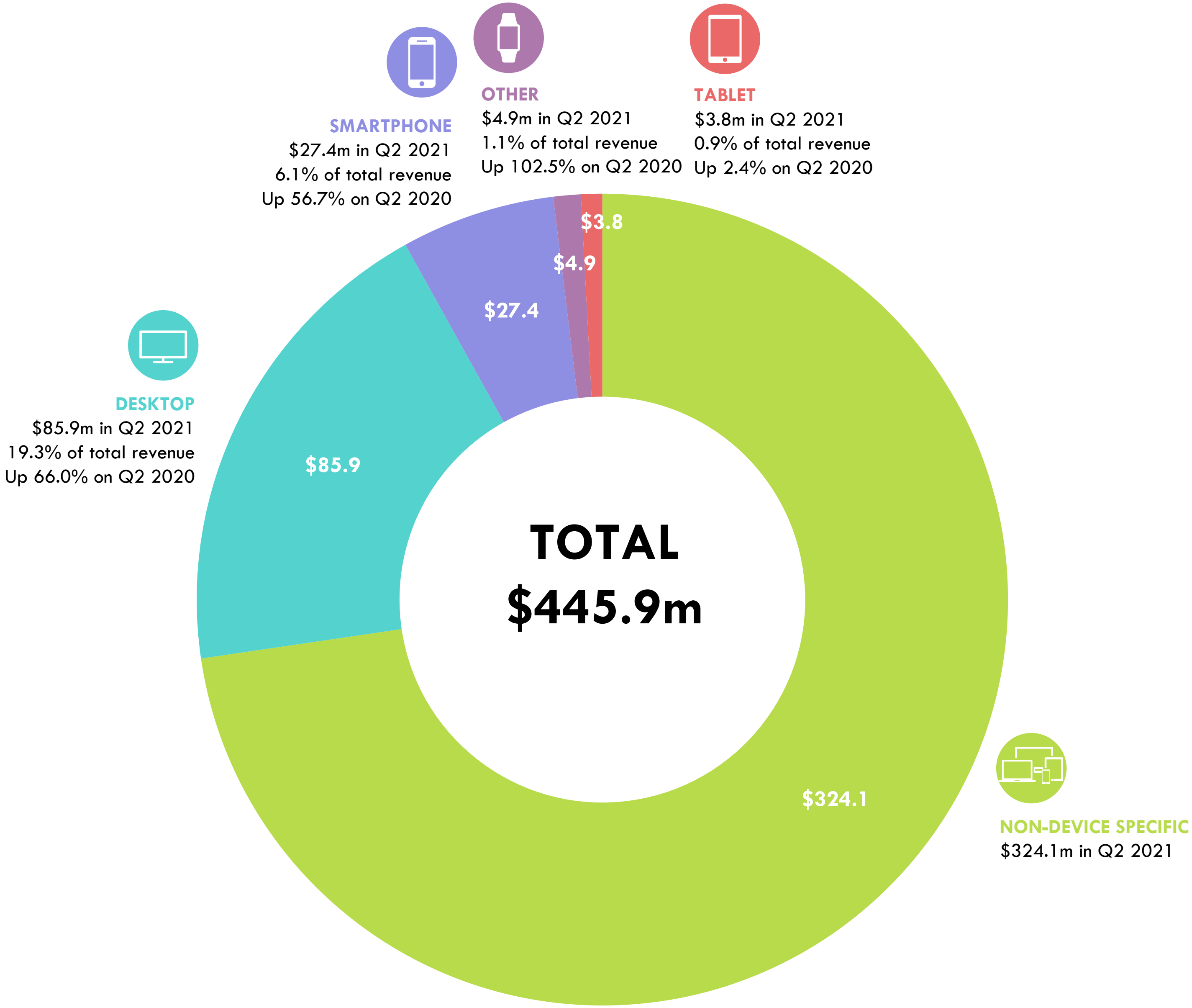
Source: Nielsen NZ Connected Consumer Report in 2017 indicated that about one fifth of New Zealand Facebook users exclusively visit Facebook via a mobile app each month (i.e. not using a browser).



06

DEVICE

6.1 Q2 2021 DEVICE REVENUE SUMMARY ($M)



Desktop holds the largest share of total digital revenue broken down by device, at 19.3% for Q2 2021, and grew 66.0% on the previous year.

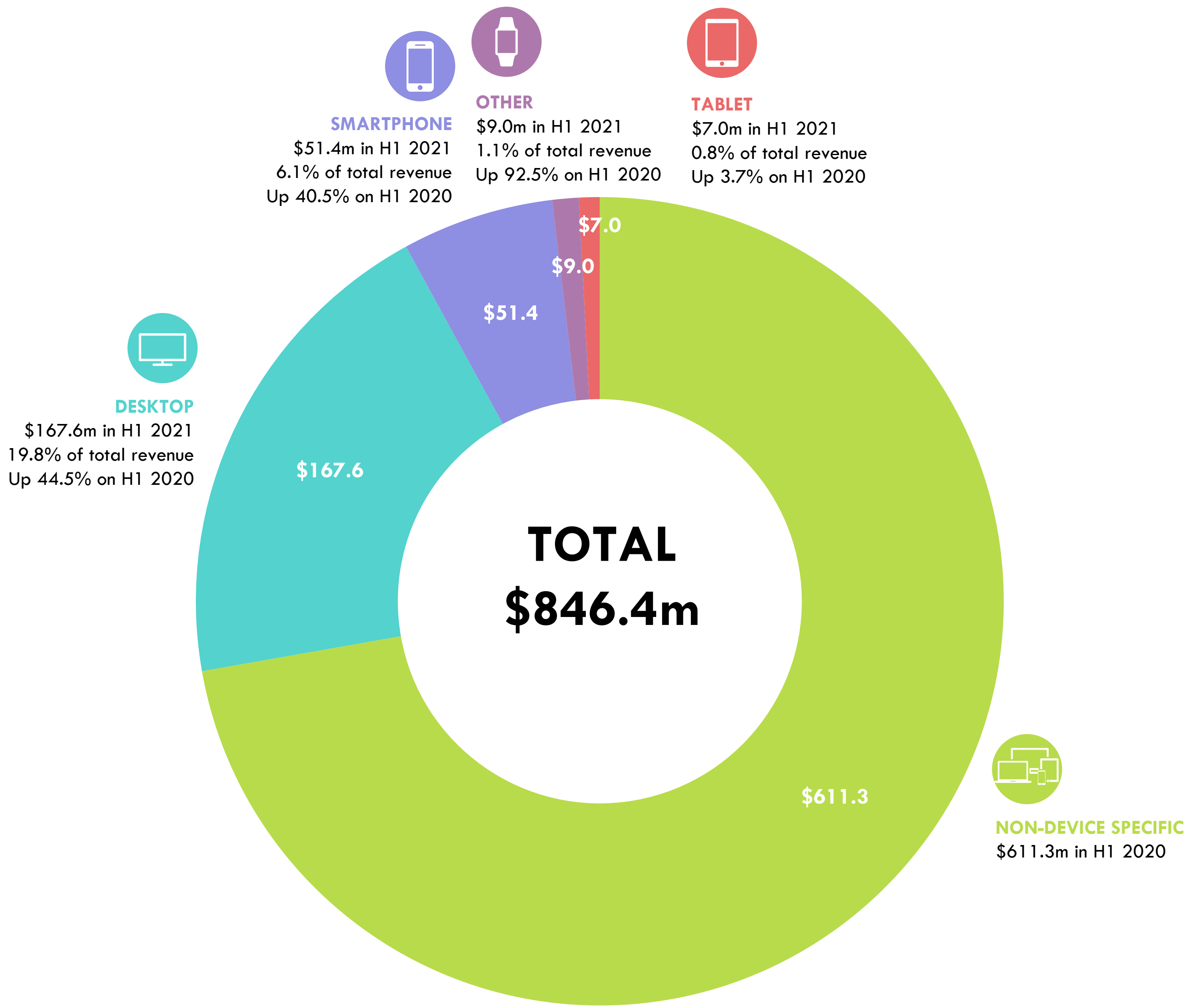
Smartphone generated $27.4 million in Q2 2021, or 6.1% of total revenue, with growth of 56.7% on the previous year.

Tablet generated $3.8 million in Q2 2021, or 0.9% of total revenue, with growth of 2.4% on Q2 2020.

Total Mobile (Smartphone and Tablet) generated $31.1m, or 7.0% of total revenue, with growth of 47.3% on the previous year.

66.0%
DESKTOP GROWTH

6.2 H1 2021 DEVICE REVENUE SUMMARY ($M)



Desktop holds the largest share of total digital revenue broken down by device, at 19.8% for H1 2021.

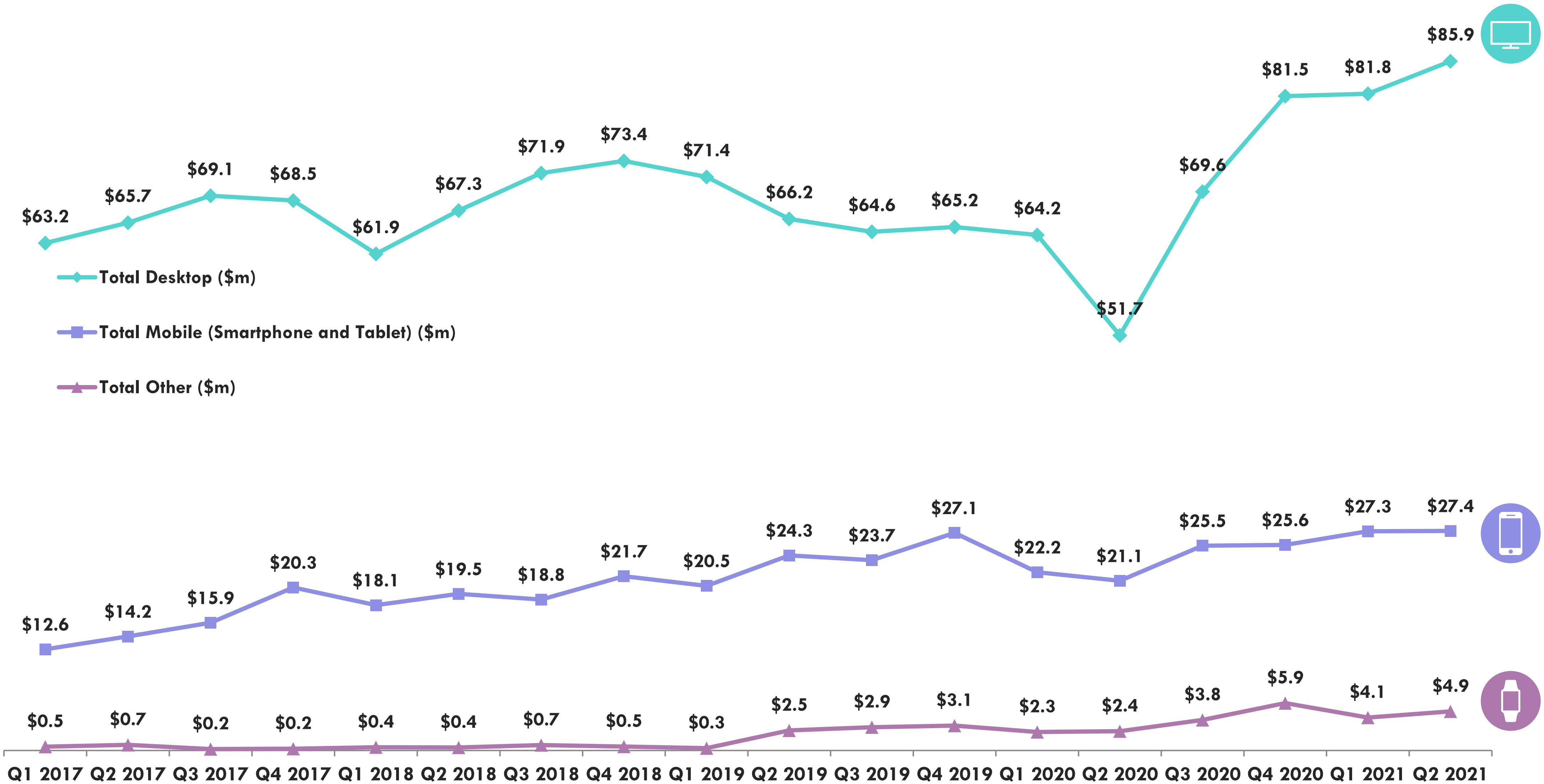
Smartphone generated $51.4 million in H1 2021, or 6.1% of total revenue, and grew 40.5% for the same period.

Tablet generated $7.0 million in H1 2021, or 0.8% of total revenue, and grew 3.7% for the same period.

Total Mobile (Smartphone and Tablet) generated $58.5 million, or 6.9% of total revenue, and grew 34.8%.

44.5% DESKTOP GROWTH

6.3 QUARTERLY TOTAL DISPLAY REVENUE BY DEVICE ($M)



NOTE: Non-Device Specific is not included

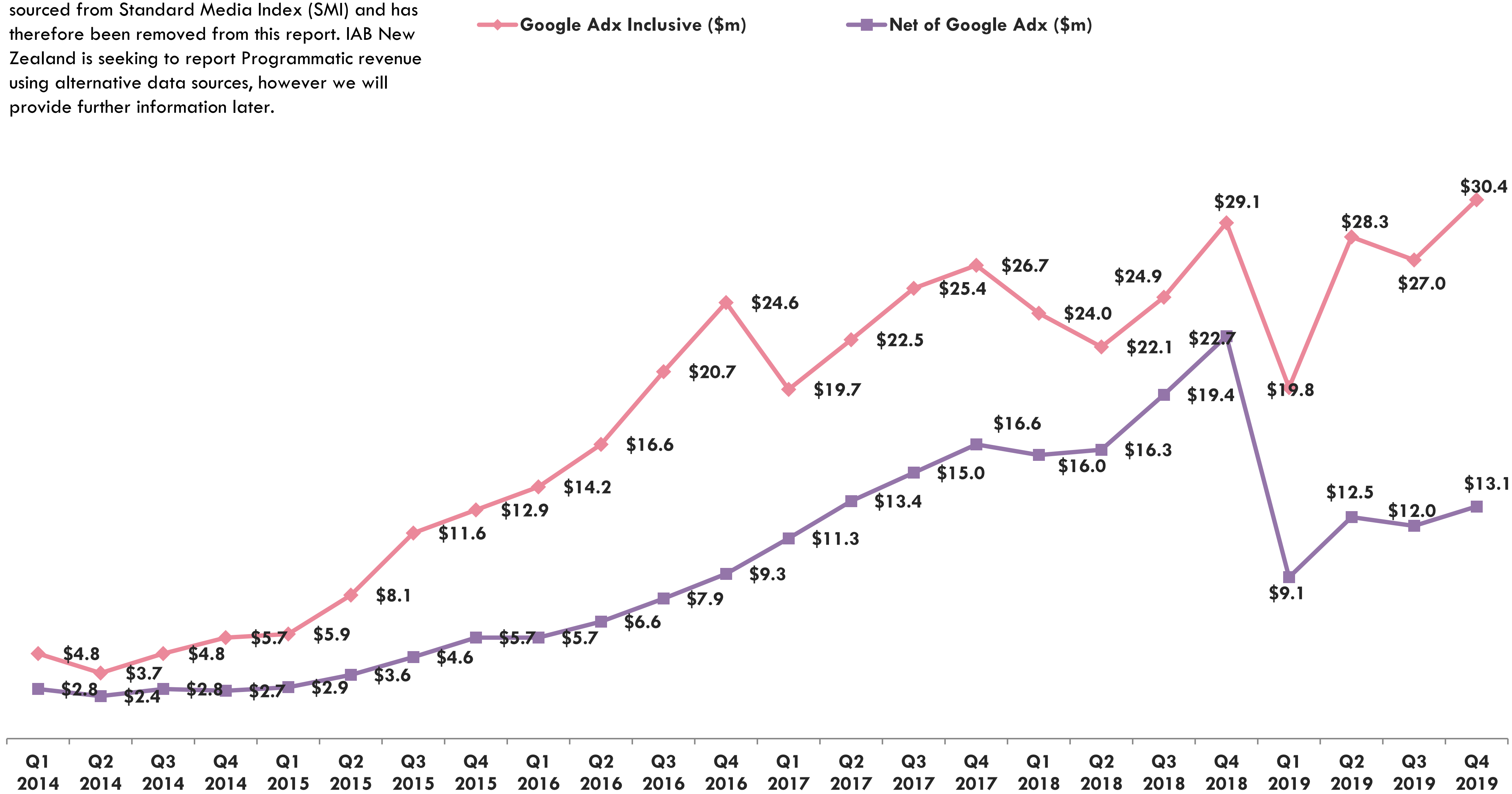
07

PROGRAMMATIC

7.1 QUARTERLY PROGRAMMATIC REVENUE

7.1 QUARTERLY PROGRAMMATIC REVENUE ($M)

As at Q2 2020, Programmatic revenue is no longer sourced from Standard Media Index (SMI) and has therefore been removed from this report. IAB New Zealand is seeking to report Programmatic revenue using alternative data sources, however we will provide further information later.



Source: As at Q4 2019, Standard Media Index (SMI)

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REPORT BACKGROUND

8.1 SCOPE AND BACKGROUND

SCOPE

The Interactive Advertising Bureau New Zealand, in conjunction with Baker Tilly Staples Rodway, produces a comprehensive standard for measuring online advertising expenditures, referred to as the IAB New Zealand Digital Advertising Revenue Report. The purpose of this report is to provide an accurate measure of online advertising revenue and trends.

The report is generated to ensure and maintain a confidential process of submission (except where otherwise stated), releasing only aggregated data. Data submitted by participants is checked to ensure the overall integrity of the report. The report includes:

- Data obtained directly from companies deriving revenue from digital advertising.
- Where possible, it is as inclusive as possible, encompassing all forms of internet/online advertising, including web sites, mobile and video advertising, including revenue sold revenue sold programmatically.

The online advertising expenditure measured by the IAB New Zealand Digital Advertising Revenue Report is based on the amounts charged to the advertiser before any reductions, for example, agency rebates. Therefore, the amount reported is the gross commissionable (or otherwise) advertising revenue, after negotiated discounts have been applied.

BACKGROUND

Data capture for the IAB New Zealand Digital Advertising Revenue Report commenced in Q2 2011 and was back dated to Q2 2007. All reported amounts are derived from participant verified actual data and estimates. Since the initial report release for the period Q2 2011, different approaches have been adopted which have impacted on reported growth. Where this has occurred, material changes have been disclosed in the report, and trends have been adjusted accordingly to reflect consistency.

The changes in methodology reflect the IAB New Zealand's view of how digital advertising revenue should be reported, given the changes in industry participants over time and the availability of alternative data sources for the purposes of estimation.

Digital advertising Revenue includes mobile and tablet, and is reported by:

- **Channel** – Total Display (General Display, Video, Native, Audio and Sponsorship), Classifieds and Directories, Search and Social.
- **Advertising Categories** (Total Display, Classified and Directories) – Agriculture, Automotive, Business Services, Computers etc.
- **Device** (Desktop, Smartphone, Tablet, Other).

8.2 PARTICIPANT DATA

Participants of the IAB New Zealand Digital Advertising Revenue Report are required to submit an online digital advertising revenue return to Baker Tilly Staples Rodway (as at Q2 2017) at the end of each relevant quarter. Prior to this, submissions were provided to PricewaterhouseCoopers (PwC). In summary, Baker Tilly Staples Rodway aggregate the submissions and review the reported figures for reasonableness in the context of past submissions, which is then reviewed by the IAB New Zealand in light of general industry trends. The process is as follows:

- IABNZ has developed a digital revenue collation and reporting platform which has be accessed by authorised contributors.
- The platform is hosted on Baker Tilly Staples Rodway's secure server.
- Contributors populate the appropriate forms. Individual reports are collated into a master report by the platform automatically. Baker Tilly Staples Rodway have access to individual contributor reports and exclusive access to the master report.
- Baker Tilly Staples Rodway undertake checks of information submitted by contributors based on analysis of quarter-on-quarter contributions. If a significant variance is identified, further analysis is performed to determine the nature of the variance.
- Only aggregated results of digital advertising expenditure are published in the IABNZ Quarterly Digital Advertising Revenue report and individual contributor information received is held by Baker Tilly Staples Rodway in strict confidence.
- 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 relevant comparative data.

Baker Tilly Staples Rodway and/or IAB New Zealand ensure the accuracy of data as follows:

- Normalising reported expenditure where necessary to account for changes in contributor numbers or changes in reporting methodology.
- Perform variance checks of information submitted by contributors, comparing each periods' results to trend data (e.g. Last period, same period last year, relative growth/decline patterns) to identify anomalies.
- Investigate any anomalies and request updated data from individual contributors (if necessary); this may include general queries, enquiries to confirm submission data, and/or enquiries to confirm that the revenue reported is in accordance with the definition of revenue being applied to the IAB New Zealand Digital Advertising Revenue Report. These checks may also include a sample check of the allocation of expenditure to categories, and do not constitute an audit.
- Check consolidation.
- Review initial results for reasonableness to determine if any adjustments or additional information is required.
- Baker Tilly Stapes Rodway review the IABNZ Quarterly Digital Advertising Revenue report quarterly, prepared by the IABNZ, to confirm accuracy of the reported data and provide feedback prior to its release.

8.3 ESTIMATED REVENUE AND OTHER DATA SOURCES

Where participant data is not available, revenue estimates, and alternative data sources have been used in the compilation of this report, as follows:

SEARCH (ESTIMATE)

Paid Search revenue estimate is derived from Google Advertising revenue as reported in the Google Alphabet investor relations report, quarterly at https://abc.xyz/investor/.

SOCIAL (ESTIMATE)

Social revenue is largely comprised of Facebook (which includes Facebook, Instagram and WhatsApp), Twitter, LinkedIn, Snapchat, Spotify and TikTok. The current report does not include Twitter, LinkedIn, Snapchat, Spotify and TikTok advertising revenue, however both Twitter and TikTok are considered to be relatively small players in the New Zealand market currently.

In order to provide more effective reporting on Social media data, effective Q3 2019 the IABNZ Quarterly Digital Advertising Revenue Report has changed the way it is reporting Social media, and retrospectively incorporated the revised methodology for data back to Q2 2018 (the earliest period which Nielsen MAU data is historically available). Additionally, as at Q4 2019 this has been changed again (refer below).

IAB New Zealand no longer sources Social media revenue from SMI and is now deriving this using worldwide Facebook ARPU (Average Revenue Per User).

The process for estimating Facebook revenue is as follows:

1. Source the Facebook worldwide ARPU number. These are generally released one month after the end of the quarter. There are multiple sources that report this, and the actual report is public, however the source used by the IABNZ is: Dazeinfo – Region:Worldwide.
2. Source Facebook MAU's and take the highest for the quarter (note that between Q2 2018 - Q3 2019 the average MAU for the quarter has been used, however this was changed to the highest MAU for the quarter as at Q4 2019). Source: Nielsen Online Rating Monthly Unique Audience (does not include exclusive app usage). Please also note that as at Q3 2020 the Nielsen data used is AP15+ and not AP10+ as previously.
3. Source the FX rate from RBNZ. Take the average FX rate for the quarter.
4. Convert the Facebook ARPU from USD into NZD.
5. Multiply quarterly average MAU*ARPU = Facebook quarterly revenue.

Given that the Nielsen Online Rating Monthly Unique Audience does not include exclusive app usage, we estimate that the Facebook revenue in this report is under-reported by approximately a fifth. Source: Nielsen NZ Connected Consumer Report in 2017 indicated that about one fifth of New Zealand Facebook users exclusively visit Facebook via a mobile app each month (i.e. not using a browser).

8.3 ESTIMATED REVENUE AND OTHER DATA SOURCES

Where participant data is not available, revenue estimates, and alternative data sources have been used in the compilation of this report, as follows:

PROGRAMMATIC (OTHER DATA SOURCE)

Programmatic revenue is not a distinct reporting channel; however it provides an indication of the inventory purchased programmatically. As at Q2 2017, Programmatic advertising revenue figures have been sourced from Standard Media Index (SMI). The reported revenue reflects the value of actual placements as reported by Agency Trading Desk bookings and bookings onto independent DSPs.

Up to and inclusive of Q2 2017, IABNZ reported programmatic revenue inclusive of Google Ad Manager. As at Q3 2017, programmatic revenue was reported net of Google Ad Manager, given concerns that programmatic revenue was being double counted, however this provided an inequitable comparison quarter on quarter. As at Q4 2018, the report format changed with trends identified; for the sake of transparency, two SMI data sets have been included, with revenue inclusive of Google Ad Manager and exclusive of Google Ad Manager.

As at Q2 2020 Programmatic revenue is no longer sourced from Standard Media Index (SMI) and has therefore been removed from this report. IAB New Zealand is seeking to report Programmatic revenue using alternative data sources, however we will provide further information later.

8.4 FORMAT

The IAB New Zealand Digital Advertising Revenue Report sources digital advertising revenue from four broad categories:

TOTAL DISPLAY, which includes advertising revenue derived from General Display, Video, Native, Audio and Sponsorship, and includes revenue derived from General Display advertisements which include banner advertising, of many different sizes and formats, including pop ups, floating and interstitial advertisements, downloaded applets which instantly interact with the user, and ads that change when the user's mouse passes over it.

CLASSIFIED AND DIRECTORIES, which includes advertising revenue derived from advertisements placed in order to buy or sell an item or service which includes recruitment, real estate, automotive, personal and other Classified and Directories.

SEARCH, which includes advertising revenue derived from paid search engine listings.

SOCIAL, which includes revenue derived from Social media platforms.

ADDITIONAL CATEGORIES ARE:

MOBILE, includes advertising revenue derived from Smartphones and tablets, and is a subset of both Device revenue, Total Display, and Classifieds and Directories revenue.

ADVERTISING CATEGORIES, revenue includes revenue derived from General Display, Video, Native, Audio, Sponsorship, Classifieds and Directories (excludes Search and Social) and includes revenue derived from General Display advertisements which includes banner advertising of many different sizes and formats, including pop ups, floating and interstitial advertisements, downloaded applets which instantly interact with the user, and ads that change when the user's mouse passes over it.

8.5 IAB NEW ZEALAND, BAKER TILLY STAPLES RODWAY

IAB NEW ZEALAND

The Interactive Advertising Bureau (IAB) is the peak trade association for digital advertising in New Zealand. As one of over 42 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 New Zealand.

The IAB Industry Charter, released in October 2018, details the IAB's focus on helping marketers and agencies understand how digital advertising can deliver on their business objectives. The IAB Industry Charter ensures the necessary standards and guidelines are in place to promote a trusted and transparent digital marketplace, reduce the friction within the digital supply chain and to improve the online advertising experience for consumers, advertisers and publishers.

Beyond the IAB's continued focus on content and advertising measurement, the Charter outlines for additional areas of activity:

- Digital advertising effectiveness
- Data and data privacy
- Standards and guidelines
- Improving the digital value chain

BAKER TILLY STAPLES RODWAY

Baker Tilly Staples Rodway is a New Zealand-wide network of accountancy and business advisory firms providing practical, responsive, and business-focussed services to a broad range of clients from start-ups to significant businesses across all industry types.

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APPENDIX

9.1 DEFINITIONS

CHANNEL DEFINITIONS

SEARCH – Advertising revenue from paid Search.

TOTAL DISPLAY:

- **GENERAL DISPLAY** – Banner advertising of many different sizes and formats, including pop ups, floating and interstitial advertisements, downloaded applets which instantly interact with the user, and ads that change when the user's mouse passes over it.
- **VIDEO** – TV-like advertisements that may appear as in-page video commercials or before, during and/or after a variety of contexts 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.
- **AUDIO** – Pre-roll, mid-roll, post-roll audio advertising, where advertisements target consumers through Podcasts, and internet radio.
- **SPONSORSHIP** – Advertisements that link a brand with related content or context in a form that is clearly distinguishable from a banner, button, or other standardised ad unit.
- **NATIVE** – Paid advertising that matches the from and function of the platform on which it appears. Native advertising could take the form of written content, video or audio.

CLASSIFIED AND DIRECTORIES – Advertisements placed in order to buy or sell an item or service which includes recruitment, real estate, automotive, personal and other Classified and Directories.

SOCIAL – Advertising revenue on paid Social media platforms.

DEVICE DEFINITIONS

DESKTOP – Online advertising viewed on a desktop PC or laptop accessed via an internet connection.

SMARTPHONE – Advertising that is viewed on a smartphone device accessed via 3G, 4G or Wifi.

TABLET – Advertising that is viewed on a tablet device accessed via 3G, 4G or Wifi.

OTHER – Advertising that is viewed on a device such as Smart TVs, Connected TV devices.

9.2 DISPLAY ADVERTISING CATEGORIES

AGRICULTURE, FORESTRY AND FISHING

This category includes any business engaged in growing crops, raising animals, growing and harvesting timber, and harvesting fish and other animals from farms or their natural habitats or supplying goods and services to the producers.

AUTOMOTIVE

Any business related to the automotive sector including vehicles (cars and motorbikes), associations, equipment, retail (car dealers), fuel, maintenance, parts and accessories.

BUSINESS AND PROFESSIONAL/TECHNICAL SERVICES AND OFFICE PRODUCTS

All companies providing services to other businesses such as accounting, legal and taxation services; advertising and marketing services; printing and publishing services, and employment/personnel/training Services. This category also includes all office products and services including stationery, furniture, photocopiers and retailers.

COMPUTERS

Computer hardware, software, peripherals, systems, connectivity including internet service providers, games machines, printers and dedicated retail and services.

FOOD AND BEVERAGES

All foodstuffs products which also includes corporate, pet food, confectionery, and all beverages including alcohol and retail liquor. This category also includes supermarkets and food stores.

GOVERNMENT DEPARTMENTS, SERVICES AND COMMUNITIES

All information on any form of Government from national to local and including political parties. This category also includes services/utilities such as gas and electricity suppliers; all educational institutions from pre-school to tertiary and, not-for-profit, community and charitable organisations.

HEALTH, BEAUTY AND PHARMACEUTICALS

This category covers toiletries and cosmetics including baby products, cosmetics, personal care products, fragrances, hair and skin care, soaps and cleaners, and pharmaceutical products including remedies, medicines, lotions, vitamins, diet, corporate, dressings, health services and retail (i.e. pharmacies).

HOME AND GARDEN

This category includes all materials used in home improvements (e.g. paving, roofing and guttering, security, paint, wallpaper and retail); household electrical products (e.g. personal products, batteries, white-ware, brown-ware); household items (e.g. cookware, light bulbs, wraps, sprays, cutlery, china, storage); household cleaning products (i.e. any product used in cleaning any area of the home including laundry products); household furnishings for the home (not covered by household electrical) i.e. beds, floor covers, occasional furniture, soft furnishings; home heating (includes all home heating or cooling products, services and retail); and gardening including garden furniture, BBQ's, tools, plants, equipment and retail.

INSURANCE

Any business, either corporate or individual, involved with insurance-related products or services. This includes motor vehicle insurance, house and household contents insurance, life insurance, health insurance, corporate and professional insurance, and brokers.

9.2 DISPLAY ADVERTISING CATEGORIES

LEISURE, ENTERTAINMENT AND MEDIA

This category includes any organisation that provides goods and services related to lifestyle and/or entertainment, or is incorporated in leisure time activities i.e. venues, events, sports, music, movies, boating, games of chance, fitness centres, dedicated retail. This category also includes any business related to mass communication i.e. mediums such as television, radio, newspapers, magazines, websites
and cinema.

MANUFACTURING AND CONSTRUCTION

This category includes units mainly engaged in the physical or chemical transformation of materials, substances or components into new products (except agriculture and construction).

REAL ESTATE

Any business providing commercial or residential property advice, information and retail services for the sale and management of real estate, includes residential housing, sections, commercial property, property developers and real estate agents.

RETAIL

This category includes major retailers such as department stores, discounters and warehouses. Also included is fast food, restaurants and other food outlets, shopping centres, bookstores, as well as direct response (e.g. Chrisco Christmas Club), function centres and support services, hair and beauty salons, craft shops, television/video rental and servicing and other specialist stores not already excluded.

Note: The Retail category excludes:

Supermarkets and food stores (covered under food and beverages); agricultural trading societies and laboratories, automotive dealers, retail liquor, clothing and footwear retail, computer retail, gardening centres and retailers, home improvement retail, furnishing and flooring retail, home heating retail, industrial contractor retail, music and entertainment (DVD/video etc.) stores, office retail, chemists, real estate agents, telecommunications retail, travel agents.

TELECOMMUNICATION

All aspects of telephony. This includes telephone hardware, accessories and services, mobile phone hardware accessories and services, telecommunications retail, corporate, and connectivity including service plans and packages.

TRAVEL AND ACCOMMODATION

Any business providing products, services and/or information and advice related to the travel and tourism industry. Any travel services including carriers, accommodation, tours, destinations and retail (i.e. travel agents).

OTHER

Any business that does not meet the general parameters of any of the preceding definitions. This may include clothing/accessories covering all areas of clothing, footwear and accessories including retail; agricultural (covering services, animal remedies and veterinary, chemicals, buildings and equipment and retail); industrial (including products, machinery, equipment, tools and retail); smoking (including all smoking products and anti-smoking products and organisations); transportation (covering commercial transportation services), pet products, manufacturing and construction, wholesale trade and education and training services.

9.3 CLASSIFIED ADVERTISING CATEGORIES

AUTOMOTIVE

Any classified advertising related to the automotive sector including vehicles (cars and motorbikes), equipment, retail (car dealers), parts and accessories, servicing.

PERSONALS

Any classified advertising related to personal advertising including dating sites, services offered, births deaths and marriages, sundry personal announcements etc.

REAL ESTATE

Any classified advertising relating to the buying, selling, leasing or rental of any form of real estate property or services including residential and commercial.

RECRUITMENT

Any classified advertising relating to the recruitment industry including situations vacant, or job-seeker advertisements, contract services etc.

OTHER

Any classified advertising that does not fall into the categories listed above.