

Q3

 **bakertilly**
STAPLES RODWAY

Q3 2020
DIGITAL
ADVERTISING
REVENUE
REPORT

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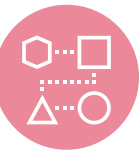
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EXECUTIVE SUMMARY

1.1 EXECUTIVE SUMMARY Q3 2020

1.2 TOTAL DIGITAL ADVERTISING REVENUE (REVISED)



EXECUTIVE SUMMARY

Q3 2020

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 Q3 2020, along with trends, to provide a contextual overview of the New Zealand digital market.

In 2019, digital revenue reached \$1.26 billion, with growth of almost 13% year-on-year. It is encouraging to see growth return, and surpassing that of Q1 2020. Q3 2020 reached \$340.7 million with year-on-year growth of 8.7%. Classified/Directories topped growth with 14.1% year-on-year growth for the quarter - the highest level of growth for this channel since Q1 2019, which was 19.2%. This is followed by Search at 9.4%, which is almost back up to the level of year-on-year growth of Q1 2020 of 9.9%. Social followed Search with almost 6% year-on-year growth. Total Display grew by 1.4% year-on-year, reversing negative growth in the first two quarters of 2020.

Within Total Display, Audio lead by a substantial margin, with year-on-year growth of 132.1%, continuing a trend of the highest average growth per quarter over the past two years of each of the Total Display channels. Video also performed exceptionally well, with 20.0% year-on-year growth for the quarter.

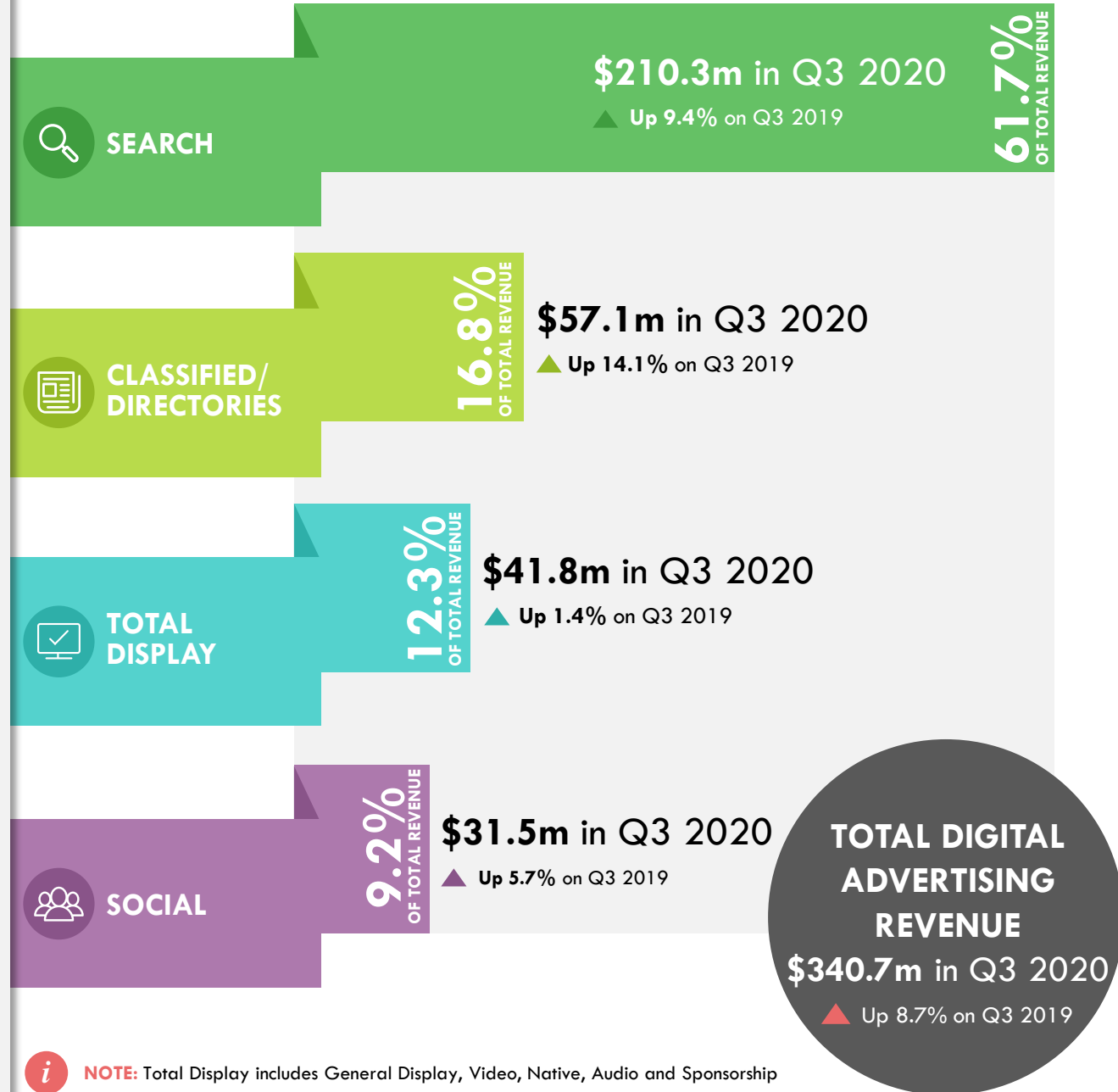
IAB New Zealand no longer sources Social media revenue from SMI and is now deriving this using worldwide Facebook ARPU (Average Revenue per user) and Facebook MAU's. (Source: Nielsen Online Rating Monthly Unique Audience - does not include exclusive app usage. **Please note that as at Q3 2020 the data used is AP15+ and not AP10+ as previously).**

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).

Using this methodology we have provided retrospective Total Digital Advertising revenue back to Q1 2018, please refer to section 1.2 Total Digital Advertising Revenue (Revised) for historical data for each quarter as at Q1 2018, up to and inclusive of Q2 2019 which reflect methodology comparisons. Furthermore, we have provided retrospective Social media comparative revenue back to Q1 2018, please refer to section 5.1 Quarterly Social Media Revenue.



GILL STEWART, CEO



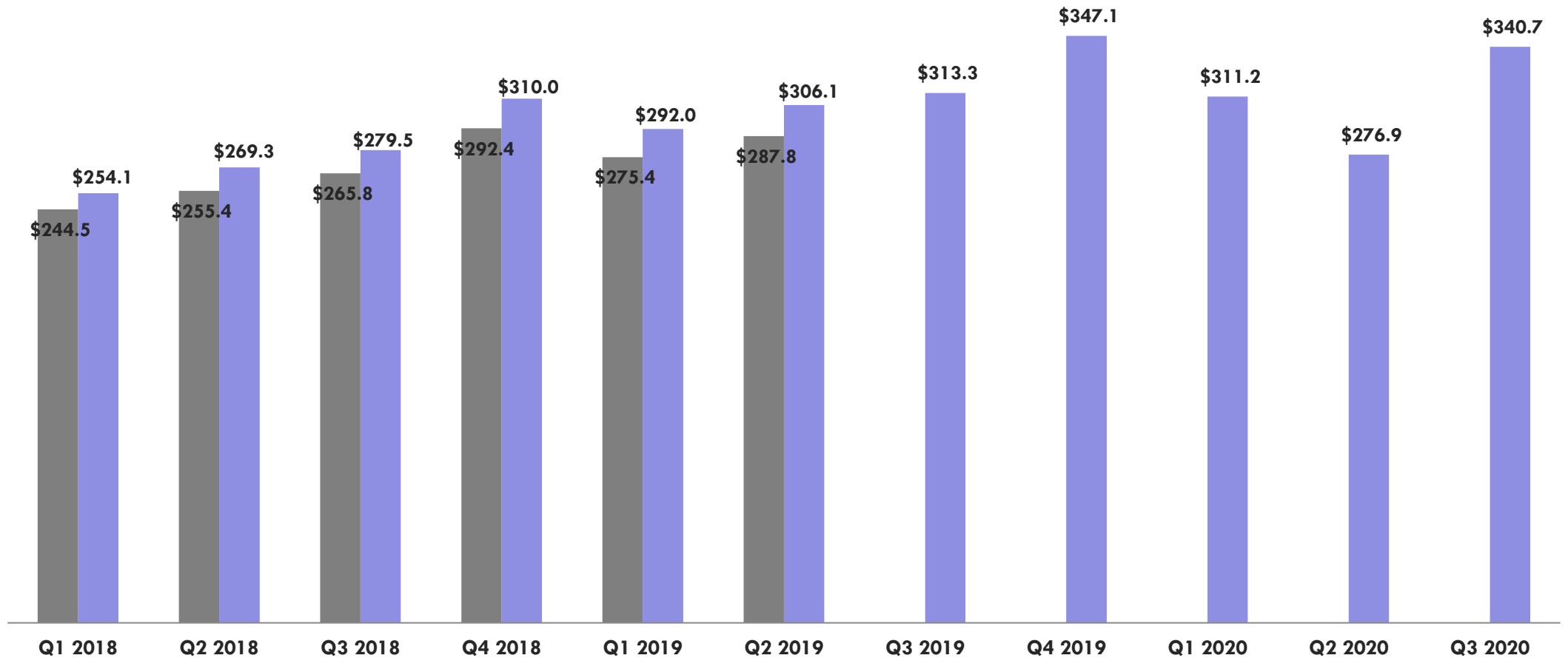
1.2 TOTAL DIGITAL ADVERTISING REVENUE (REVISED)

Q3 2019: IABNZ commenced reporting Social media revenue using revised methodology, which has been retrospectively applied to Q1 2018. Please refer to page 30 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).

■ Quarterly Digital Advertising Revenue using SMI Reported Social Revenue (\$M) ■ Quarterly Digital Advertising Revenue using Revised Methodology (\$M)

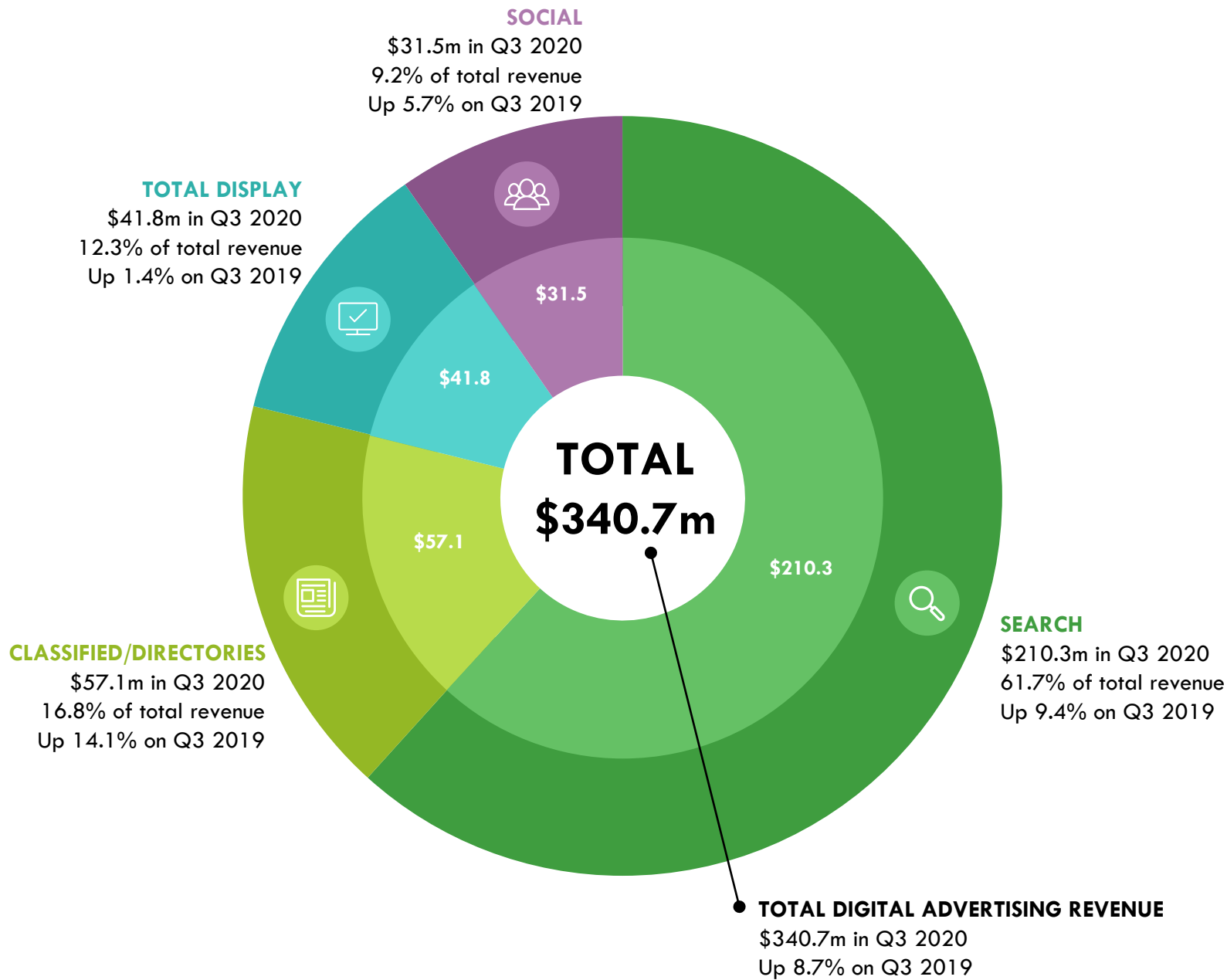




TOPLINE OVERVIEW

- 2.1 Q3 2020 CHANNEL REVENUE SUMMARY
- 2.2 TOTAL INDUSTRY REVENUE
- 2.3 QUARTERLY DIGITAL REVENUE BY CHANNEL
- 2.4 QUARTERLY DIGITAL SHARE OF REVENUE BY CHANNEL
- 2.5 ANNUAL DIGITAL SHARE OF REVENUE BY CHANNEL

2.1 Q3 2020 CHANNEL REVENUE SUMMARY



Q3 2020 revenue reached \$340.7 million, with year-on-year growth of 8.7% on Q3 2019.

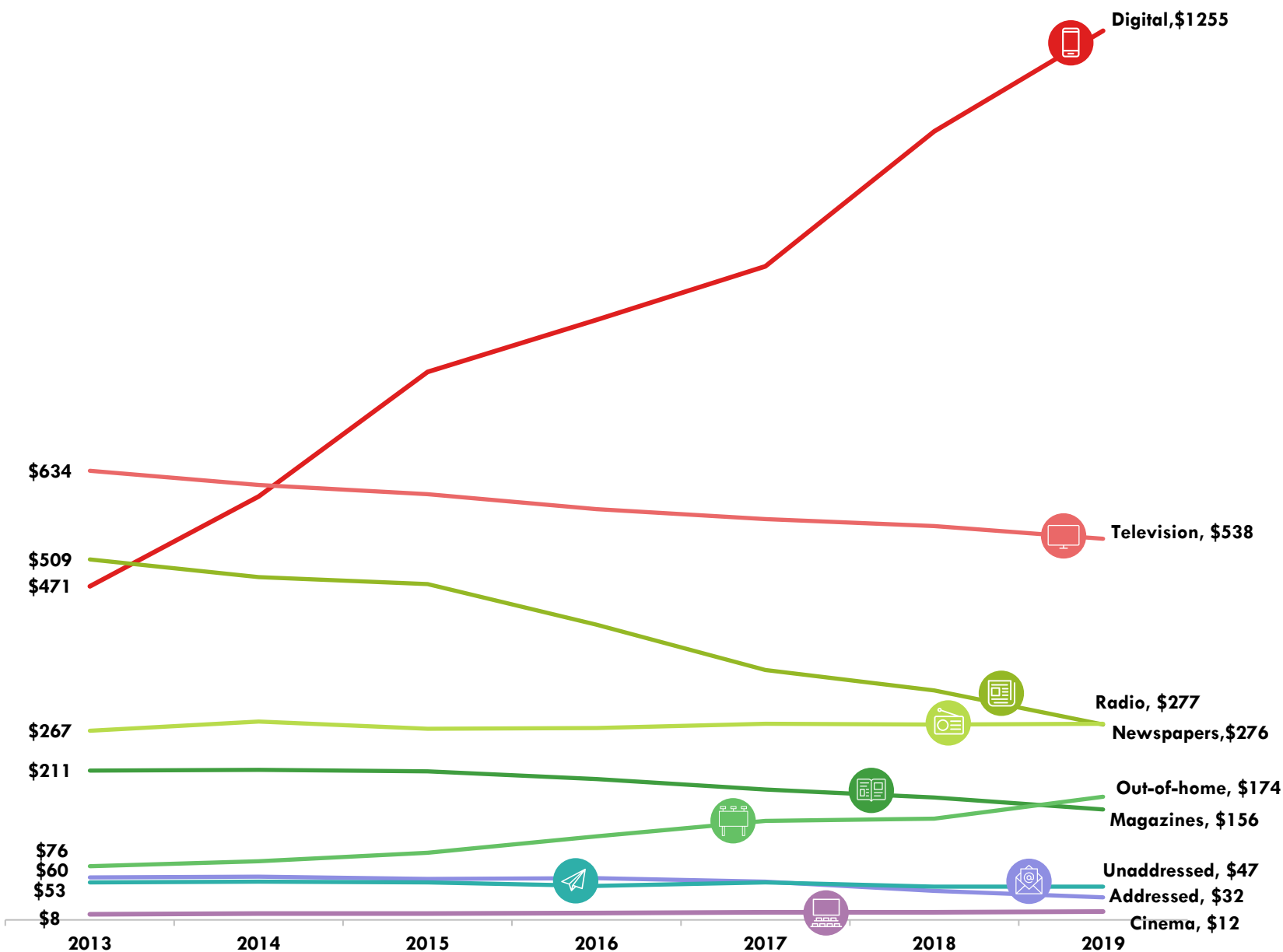
Classified/Directories recorded the highest year-on-year growth for the quarter at 14.1% followed by Search at 9.4%.



8.7%
YEAR-ON-YEAR
GROWTH

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

2.2 TOTAL INDUSTRY REVENUE



DIGITAL ADVERTISING REVENUE EXCEEDS \$1.2 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 May 2020 the ASA New Zealand Media Turnover Report was released; the entire industry grew at the rate of 3.4%. ⁽¹⁾⁽²⁾

In 2019 digital advertising revenue surpassed \$1.2 billion for the first time, following nine consecutive quarters of double-digit growth, up almost 13% year-on-year.⁽³⁾

Digital share of total media turnover has increased from 41.6% in 2018 to 45.4% in 2019. ⁽²⁾⁽¹⁾

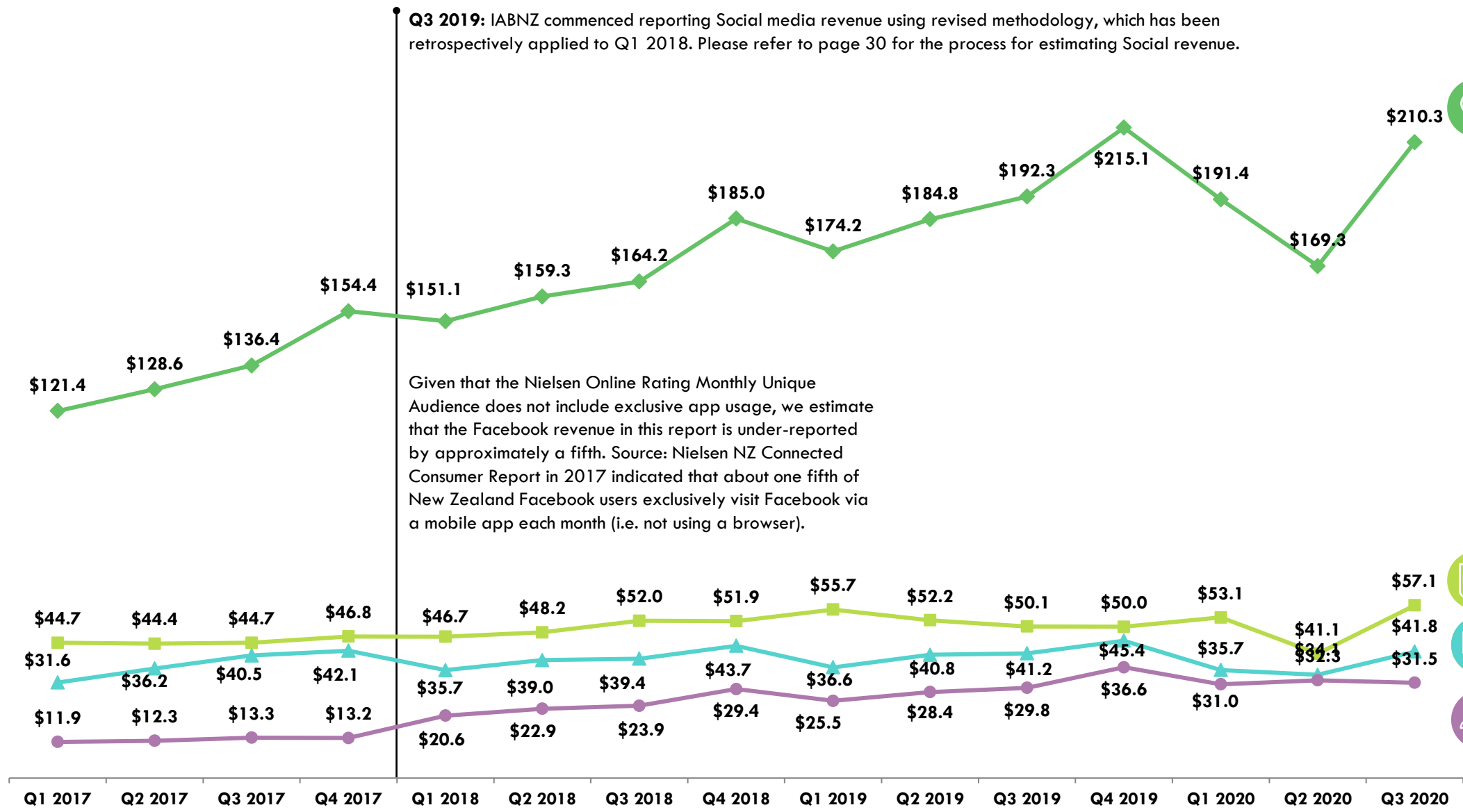
Digital revenue continues to grow and cement itself as an increasingly important component of many advertisers' marketing strategies.

Sources:

- (1) ASA New Zealand Media Turnover Report 2019
- (2) ASA New Zealand Media Turnover Report 2018
- (3) IAB New Zealand Q4 2019 Digital Advertising Revenue Report

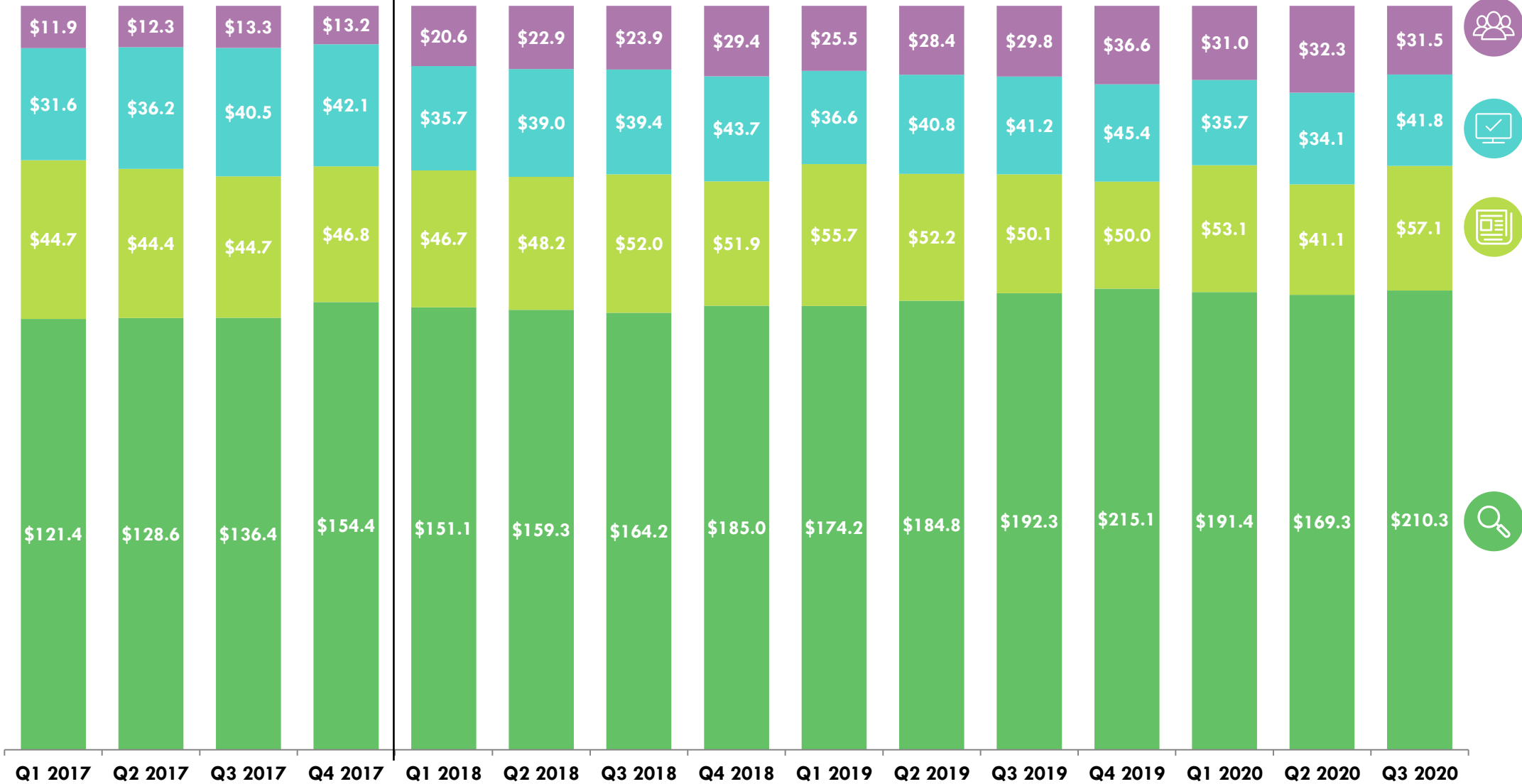
i **NOTE:** Revenue for each media excludes digital, as it is included in total digital revenue

2.3 QUARTERLY DIGITAL REVENUE BY CHANNEL



2.4 QUARTERLY DIGITAL SHARE OF REVENUE BY CHANNEL

Q3 2019: IABNZ commenced reporting Social media revenue using revised methodology, which has been retrospectively applied to Q1 2018. Please refer to page 30 for the process for estimating Social revenue.



KEY



Search (\$m)



Classified/Directories (\$m)



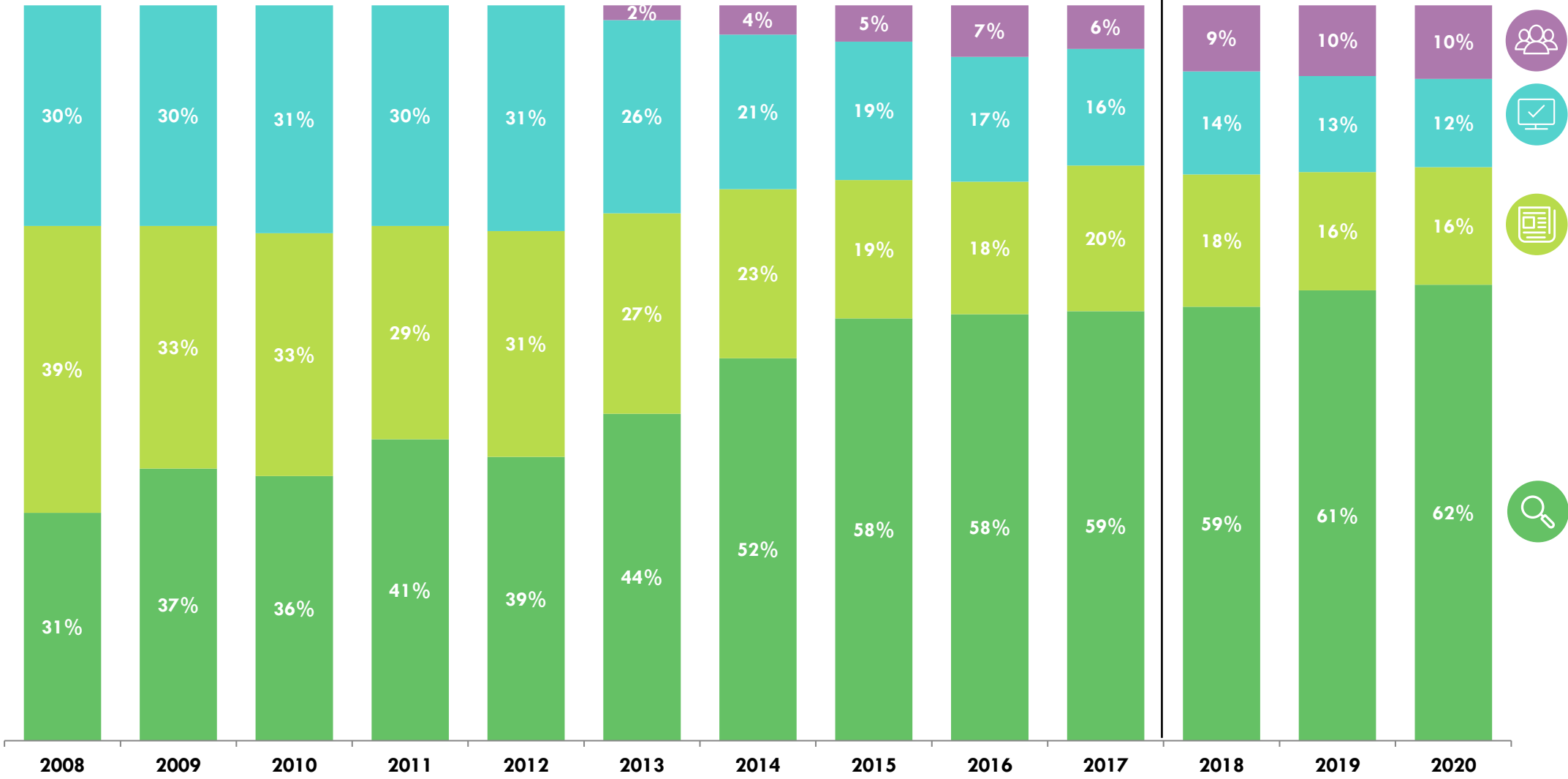
Total Display (\$m)




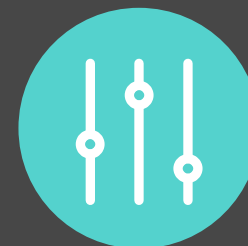
Social Media (\$m)

2.5 ANNUAL DIGITAL SHARE OF REVENUE BY CHANNEL

Q3 2019: IABNZ commenced reporting Social media revenue using revised methodology, which has been retrospectively applied to Q1 2018. Please refer to page 30 for the process for estimating Social revenue.



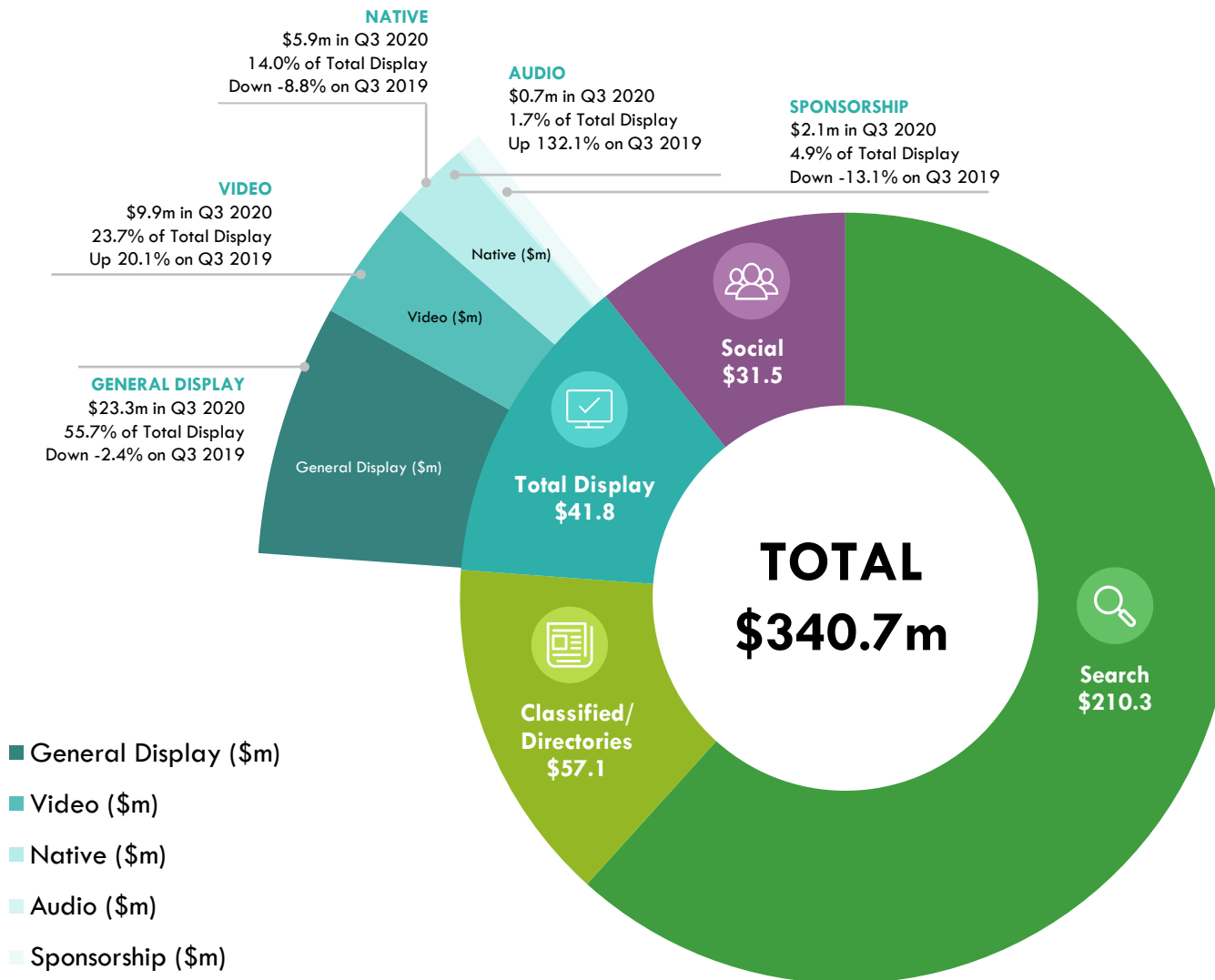
 Directories included in Search up until and inclusive of Q2 2018; as at Q3 2018 included with Classified as Classified and Directories.
 • 2019 annual digital share of revenue by channel is based on the combined revenue totals of Q1, Q2, Q3 and Q4 2019.



DISPLAY CHANNEL

- 3.1 Q3 2020 DISPLAY CHANNEL REVENUE SUMMARY
- 3.2 QUARTERLY DISPLAY CHANNEL REVENUE TRENDS
- 3.3 QUARTERLY TOTAL DISPLAY SHARE OF REVENUE BY CHANNEL
- 3.4 NATIVE REVENUE BREAKDOWN

3.1 Q3 2020 DISPLAY CHANNEL REVENUE SUMMARY



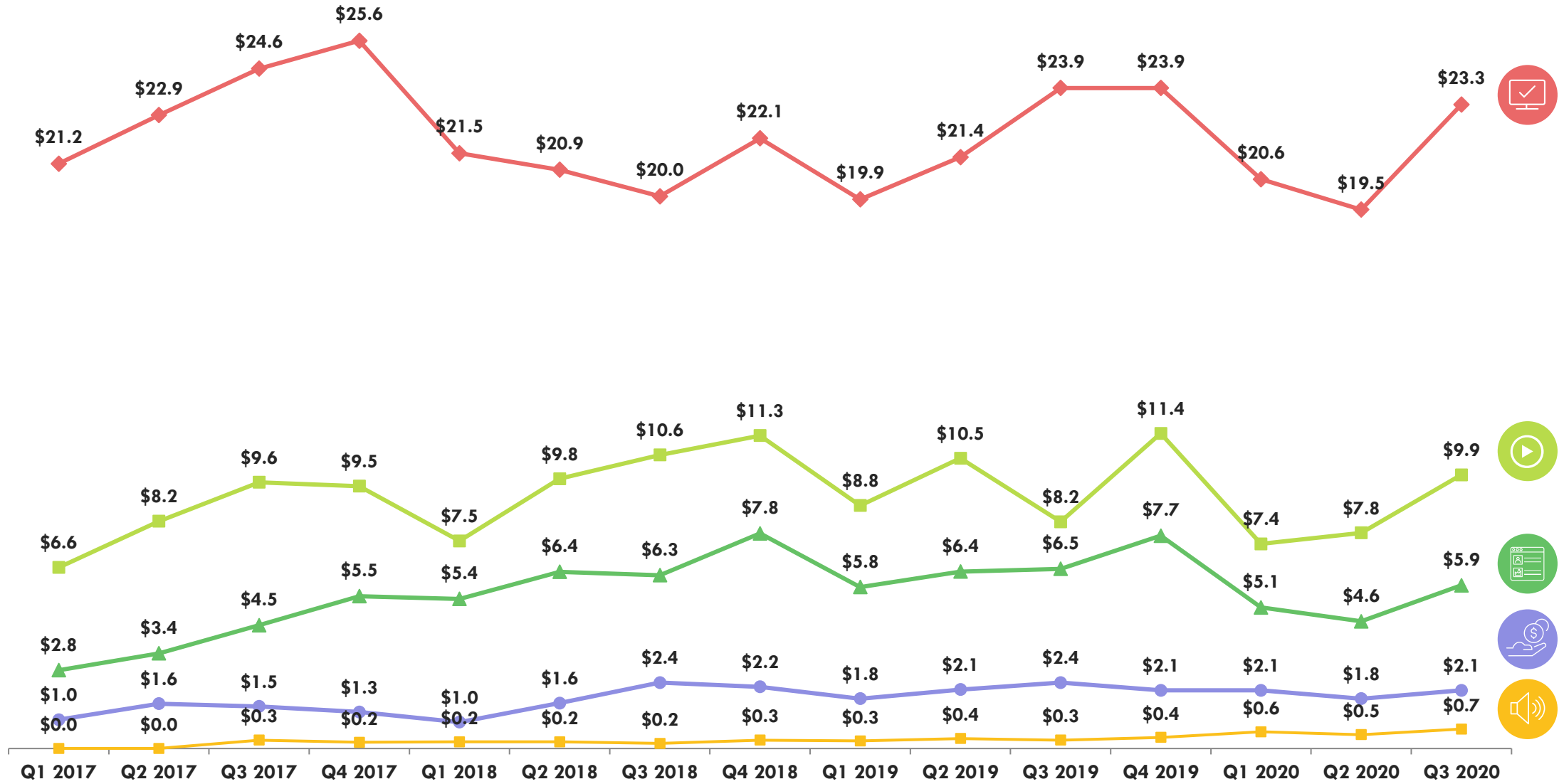
Total Display (all devices) in Q3 reached \$41.8 million and represented 12.3% of total digital revenue for Q3 2020.

This chart shows channel breakdowns for Total Display into General Display, Video, Native, Audio and Sponsorship, and their percentage of Total Display revenue for Q3 2020.

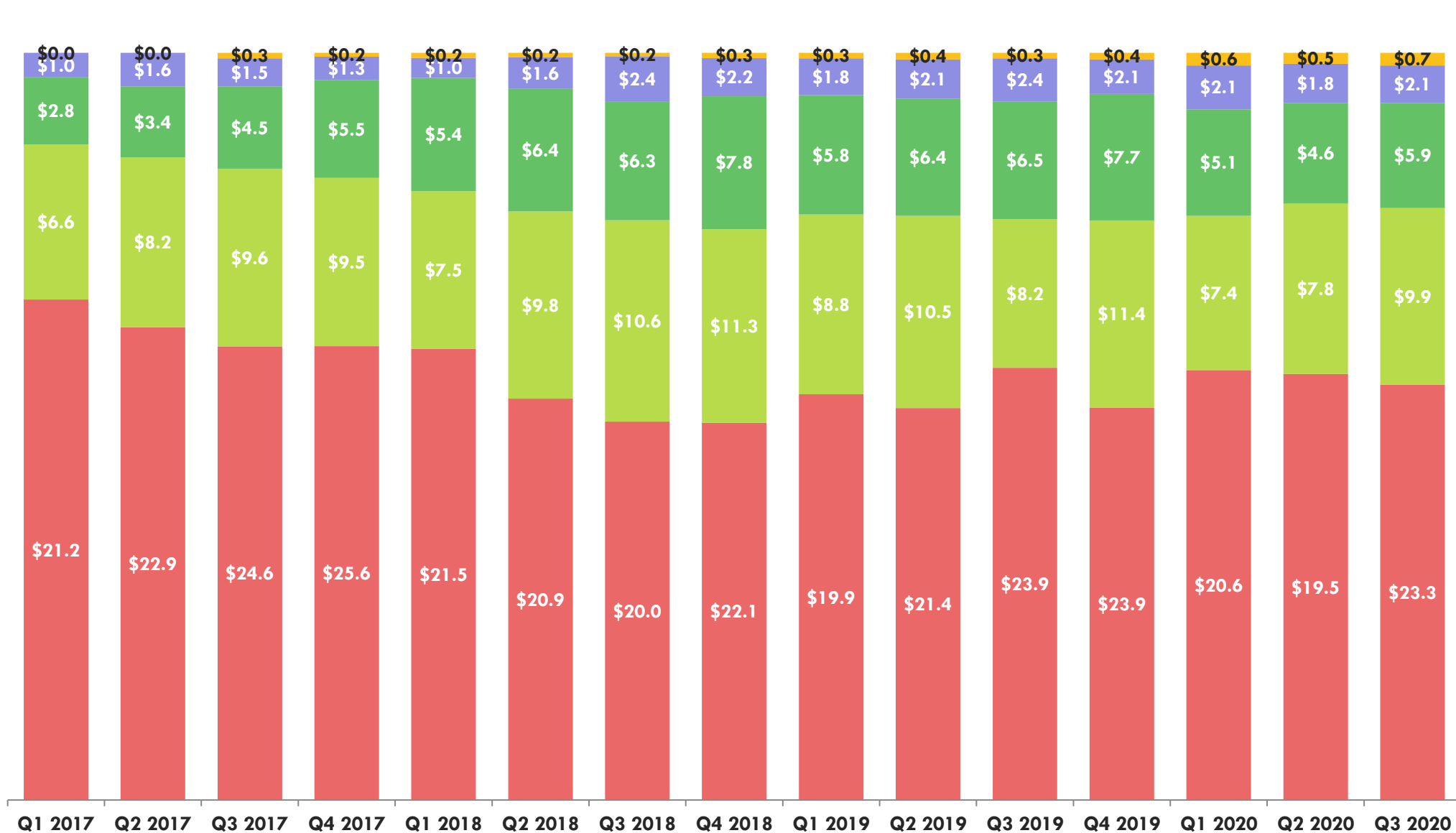
Q3 2020 growth on the same quarter last year, for Total Display channels was topped by Audio at 132.1%, followed by Video at 20.1%.

1.4%
TOTAL DISPLAY GROWTH

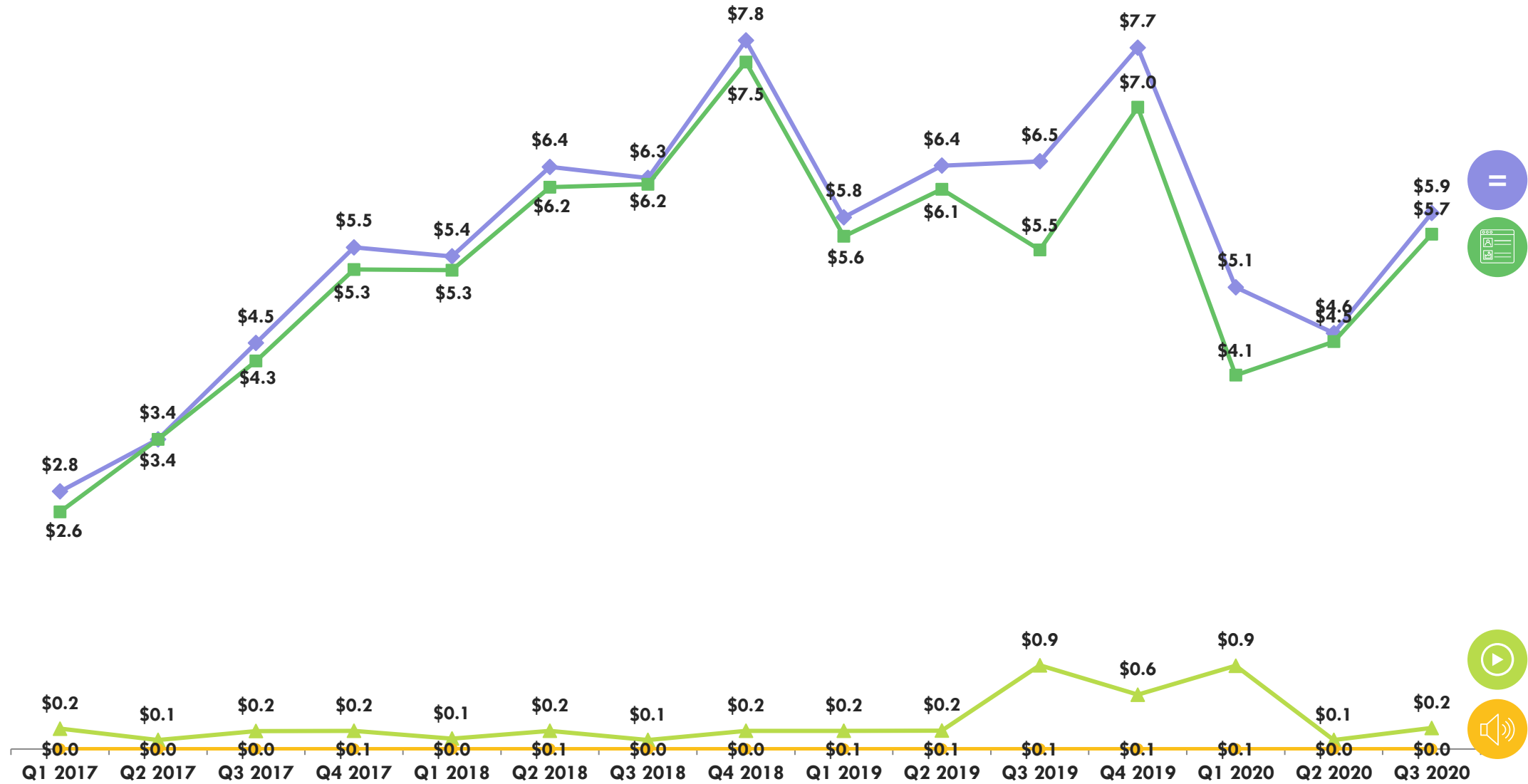
3.2 QUARTERLY DISPLAY CHANNEL REVENUE TRENDS



3.3 QUARTERLY TOTAL DISPLAY SHARE OF REVENUE BY CHANNEL







3.4 NATIVE REVENUE BREAKDOWN



KEY

-  Total Native (\$m)
-  Native Content (\$m)
-  Native Video (\$m)
-  Native Audio (\$m)

Q4

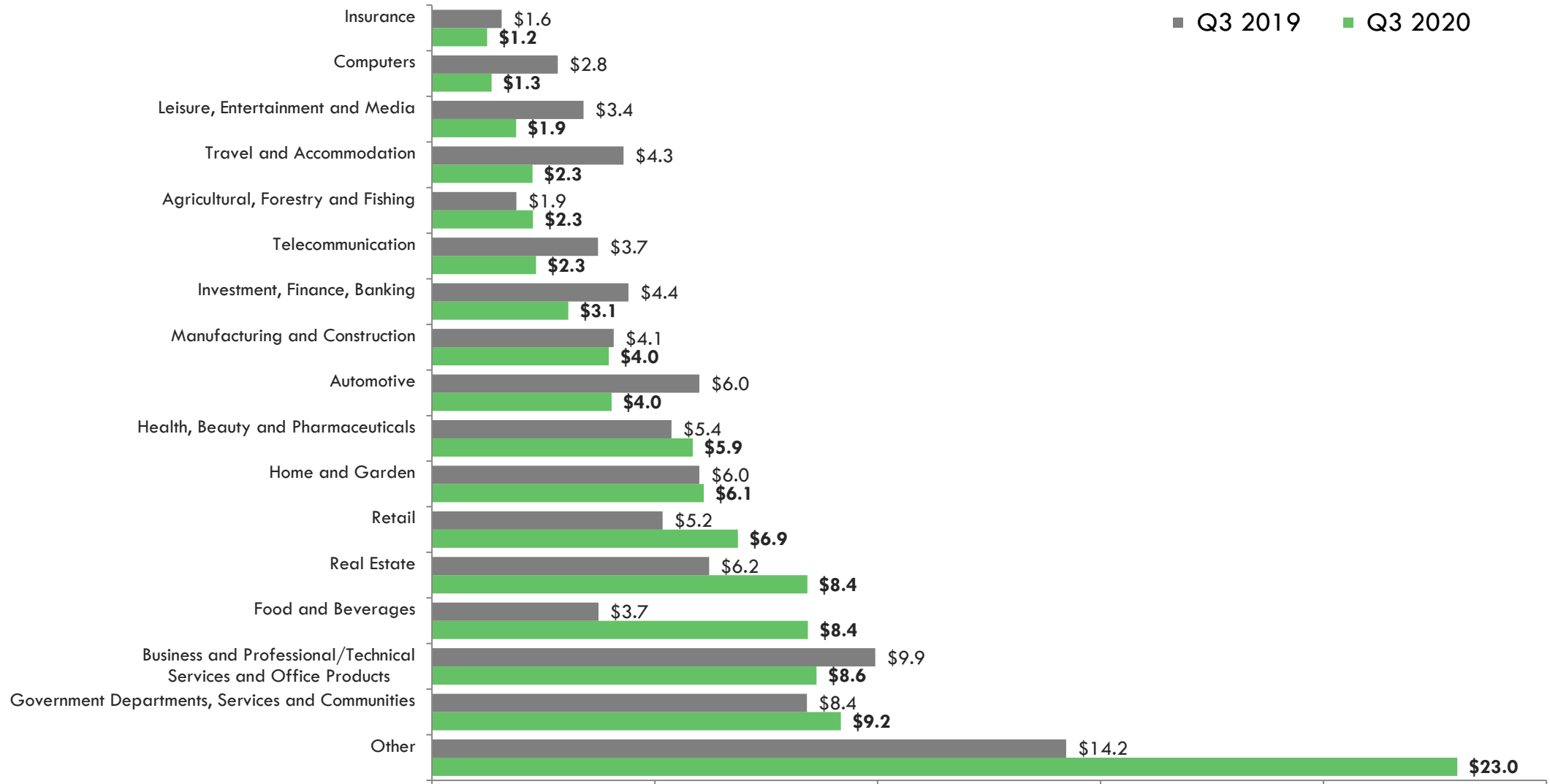


ADVERTISING CATEGORIES

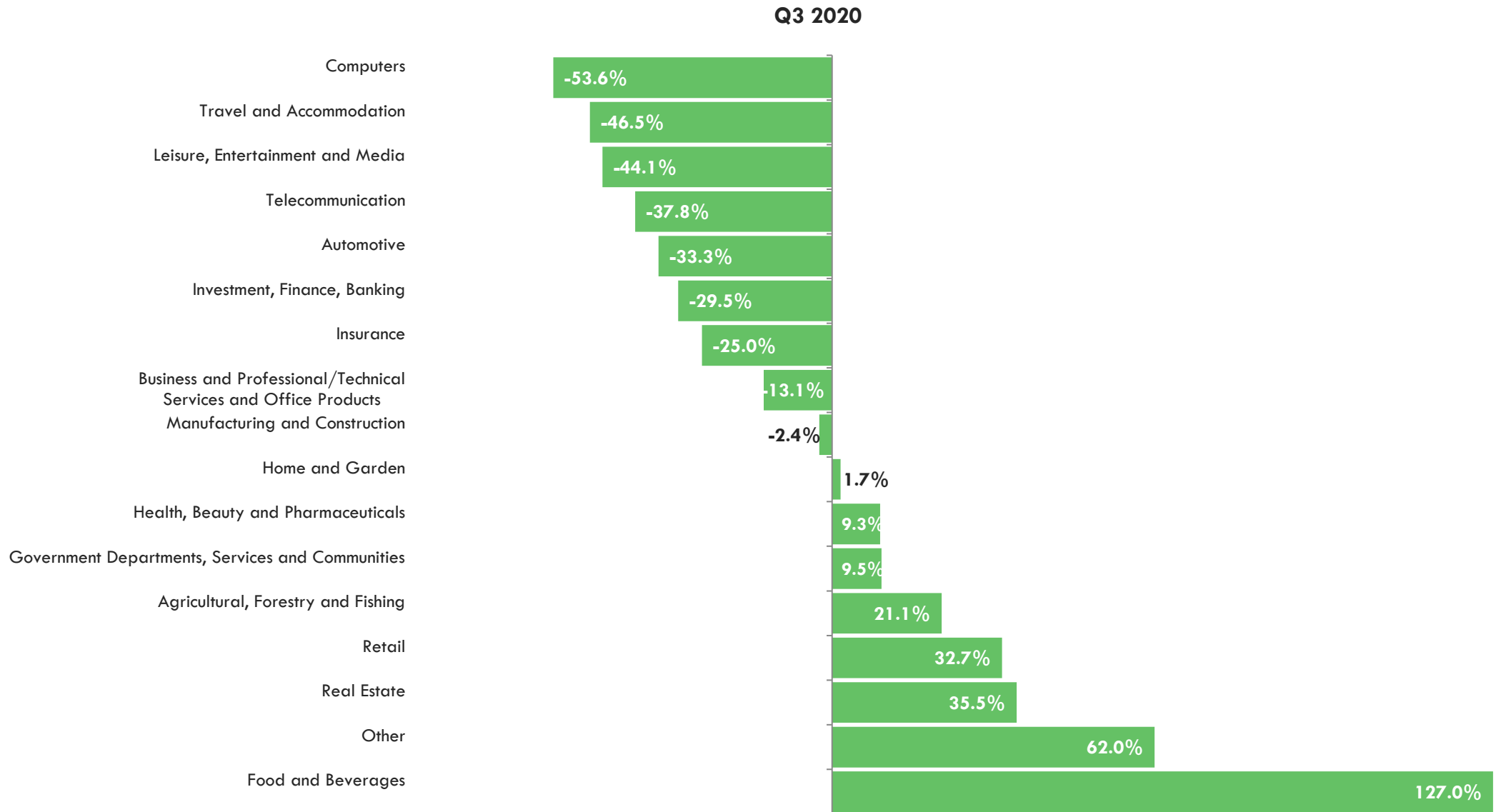
4.1 Q3 2020 REVENUE BY CATEGORY

4.2 Q3 2020 YEAR-ON-YEAR VARIANCE BY CATEGORY

4.1 Q3 2020 REVENUE BY CATEGORY



4.2 Q3 2020 YEAR-ON-YEAR VARIANCE BY CATEGORY



Q3



SOCIAL

5.1 QUARTERLY SOCIAL MEDIA REVENUE

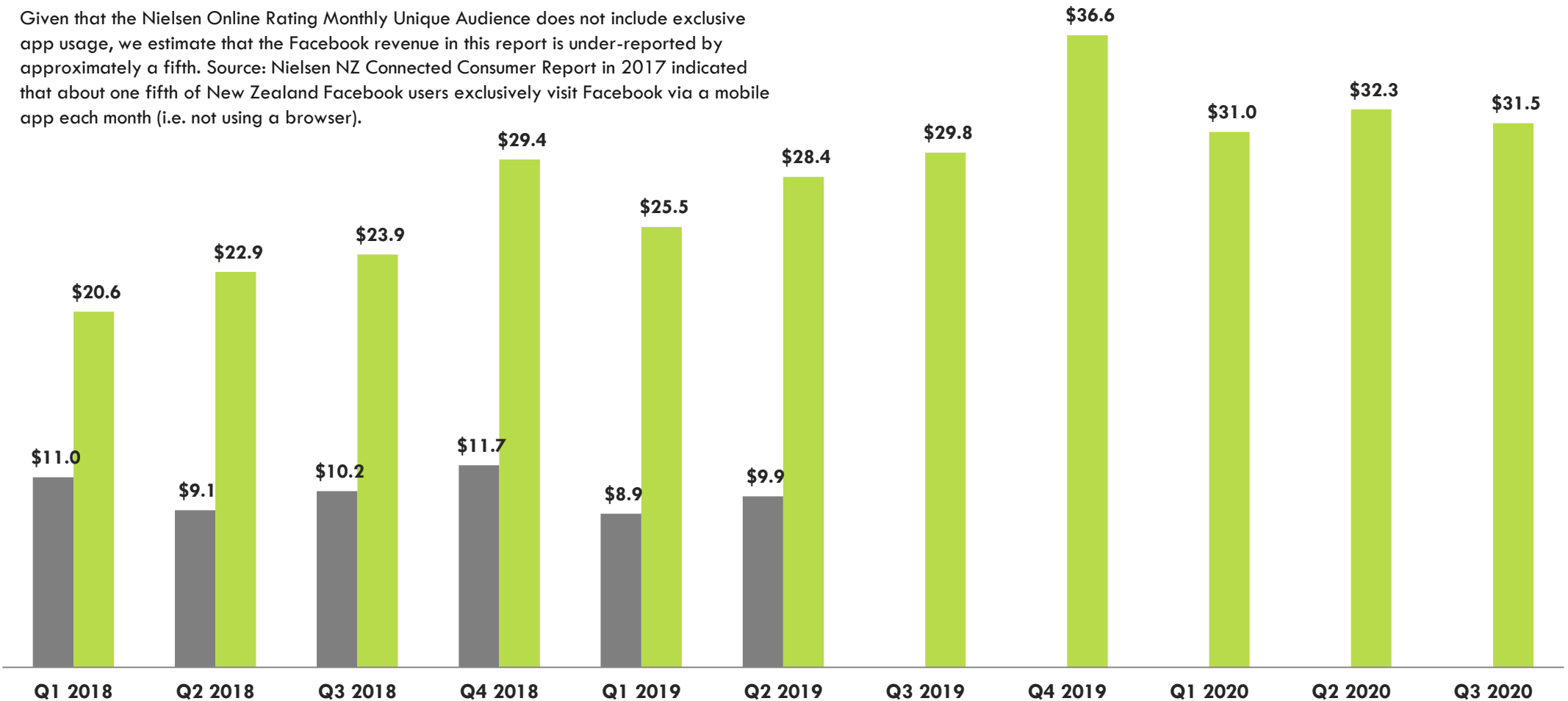
5.1 QUARTERLY SOCIAL MEDIA REVENUE

Q3 2019: IABNZ commenced reporting Social media revenue using revised methodology, which has been retrospectively applied to Q1 2018. Please refer to page 30 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).

- SMI Reported Social Revenue (\$M)
- Quarterly Social Revenue Revised Methodology (\$M)



Q6

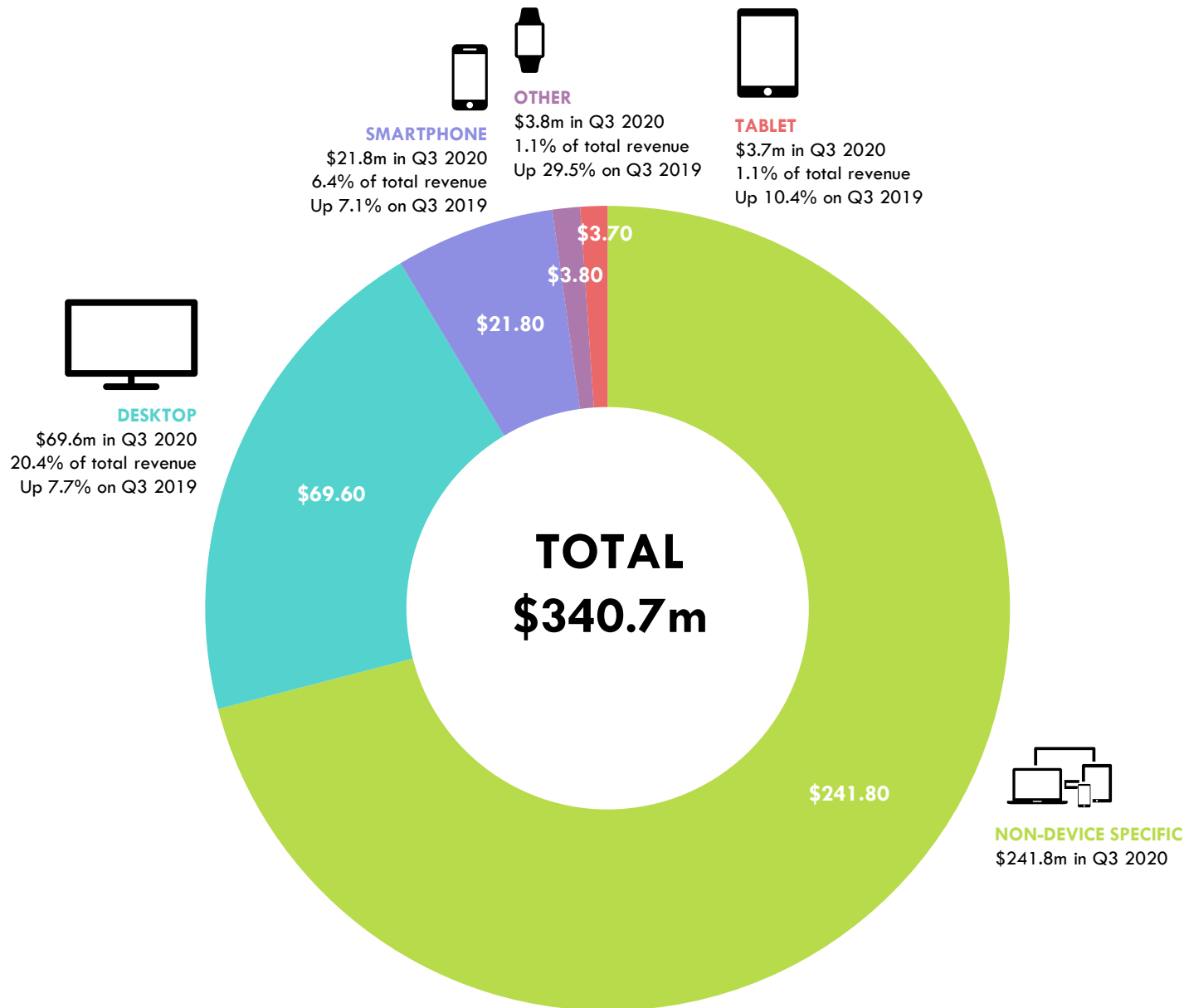


DEVICE

6.1 Q3 2020 DEVICE REVENUE SUMMARY

6.2 QUARTERLY TOTAL DISPLAY REVENUE BY DEVICE

6.1 Q3 2020 DEVICE REVENUE SUMMARY



Desktop holds the largest share of total digital revenue broken down by device, at 20.4% for Q3 2020.

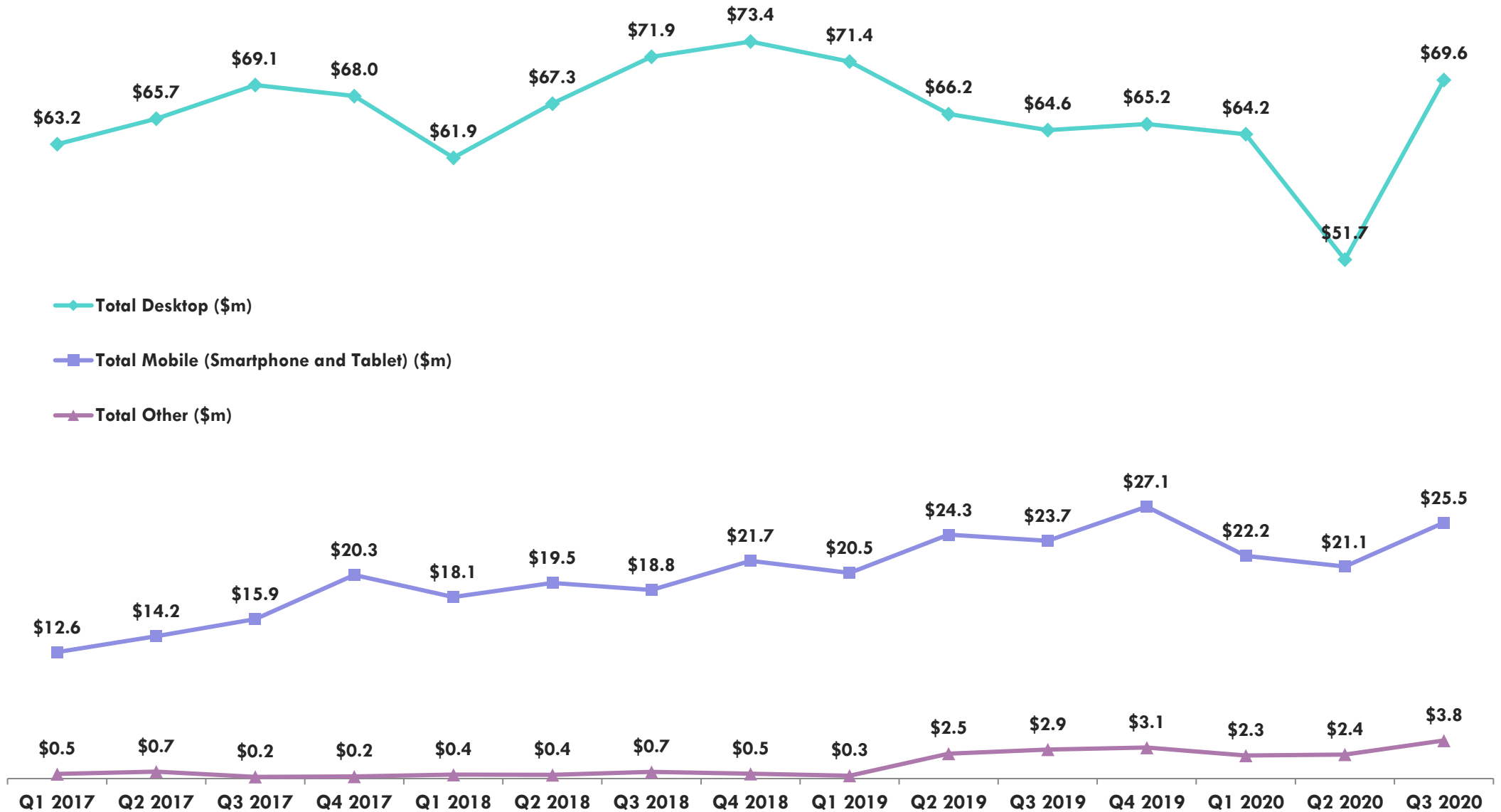
Smartphone generated \$21.8 million in Q3 2020, or 6.4% of total revenue.

Tablet generated \$3.7 million in Q3 2020, or 1.1% of total revenue, and grew 10.4% year-on-year.

Total Mobile (Smartphone and Tablet) generated \$25.5m, or 7.5% of total revenue, and grew 7.5%.

**7.5%
TOTAL
MOBILE
GROWTH**

6.2 QUARTERLY TOTAL DISPLAY REVENUE BY DEVICE



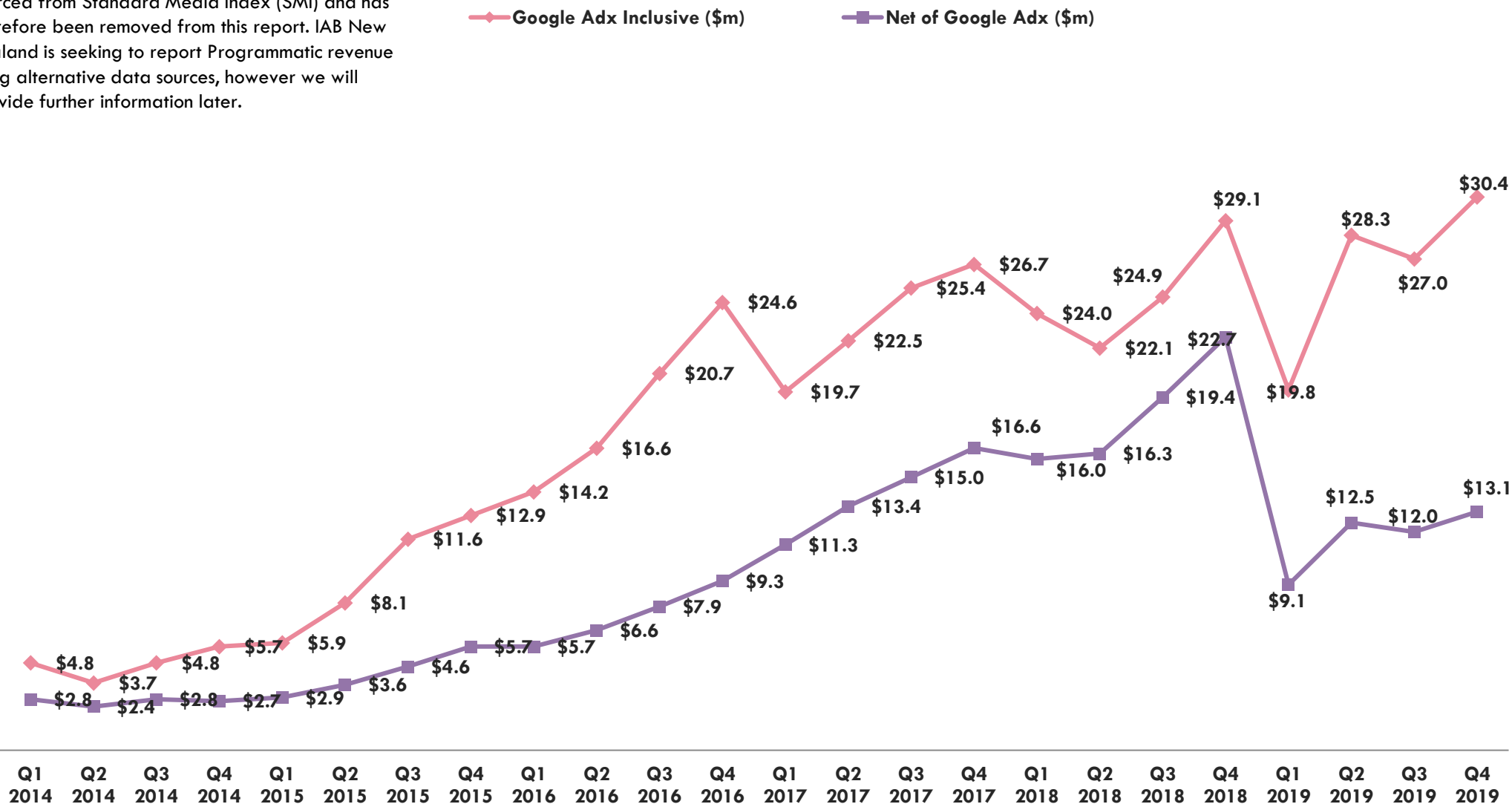


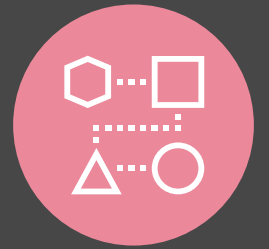
PROGRAMMATIC

7.1 QUARTERLY PROGRAMMATIC REVENUE

7.1 QUARTERLY PROGRAMMATIC REVENUE

As at Q1 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.





REPORT BACKGROUND

- 8.1 SCOPE AND BACKGROUND
- 8.2 PARTICIPANT DATA
- 8.3 ESTIMATED REVENUE AND OTHER DATA SOURCES
- 8.4 FORMAT
- 8.5 IAB NEW ZEALAND, BAKER TILLY STAPLES RODWAY



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 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 Q1 2011 and was back dated to Q1 2007. All reported amounts are derived from participant verified actual data and estimates. Since the initial report release for the period Q1 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 Q1 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 been 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 period's 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 Staples 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 Q1 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 Q1 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 Q1 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 Q1 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.



APPENDIX

9.1 DEFINITIONS

9.2 DISPLAY ADVERTISING CATEGORIES

9.3 CLASSIFIED ADVERTISING CATEGORIES

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 form 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.