

iab.
australia

nickable charts.

August 2021



australian **digital media** consumption.



21 million

australians (age 2+) were online this month



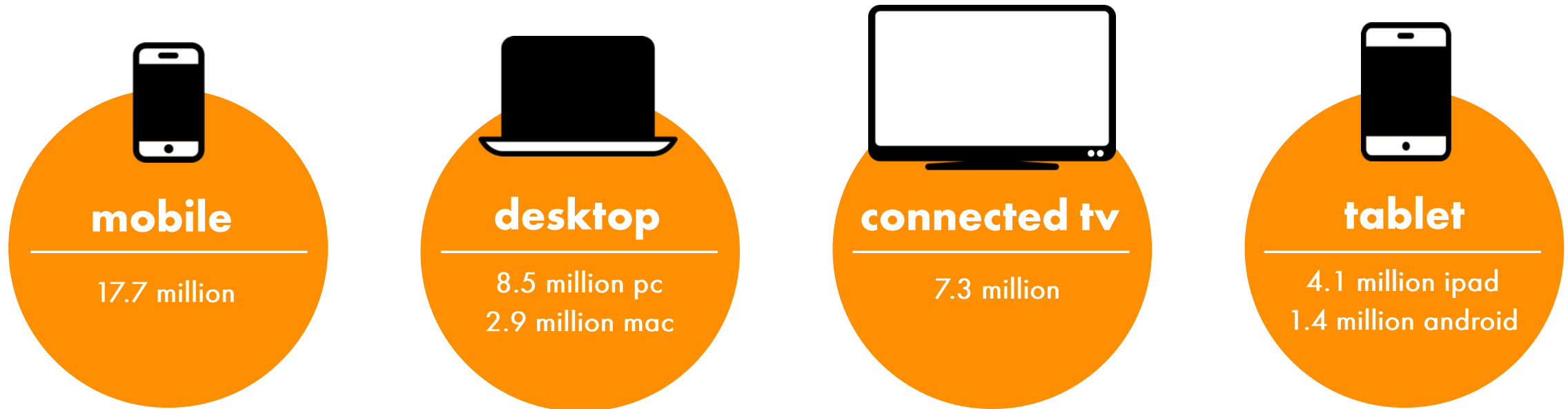
\$9.5 billion

digital ad market supports this content consumption



consumer trends charts.

australians continue to access online content daily across multiple screens.



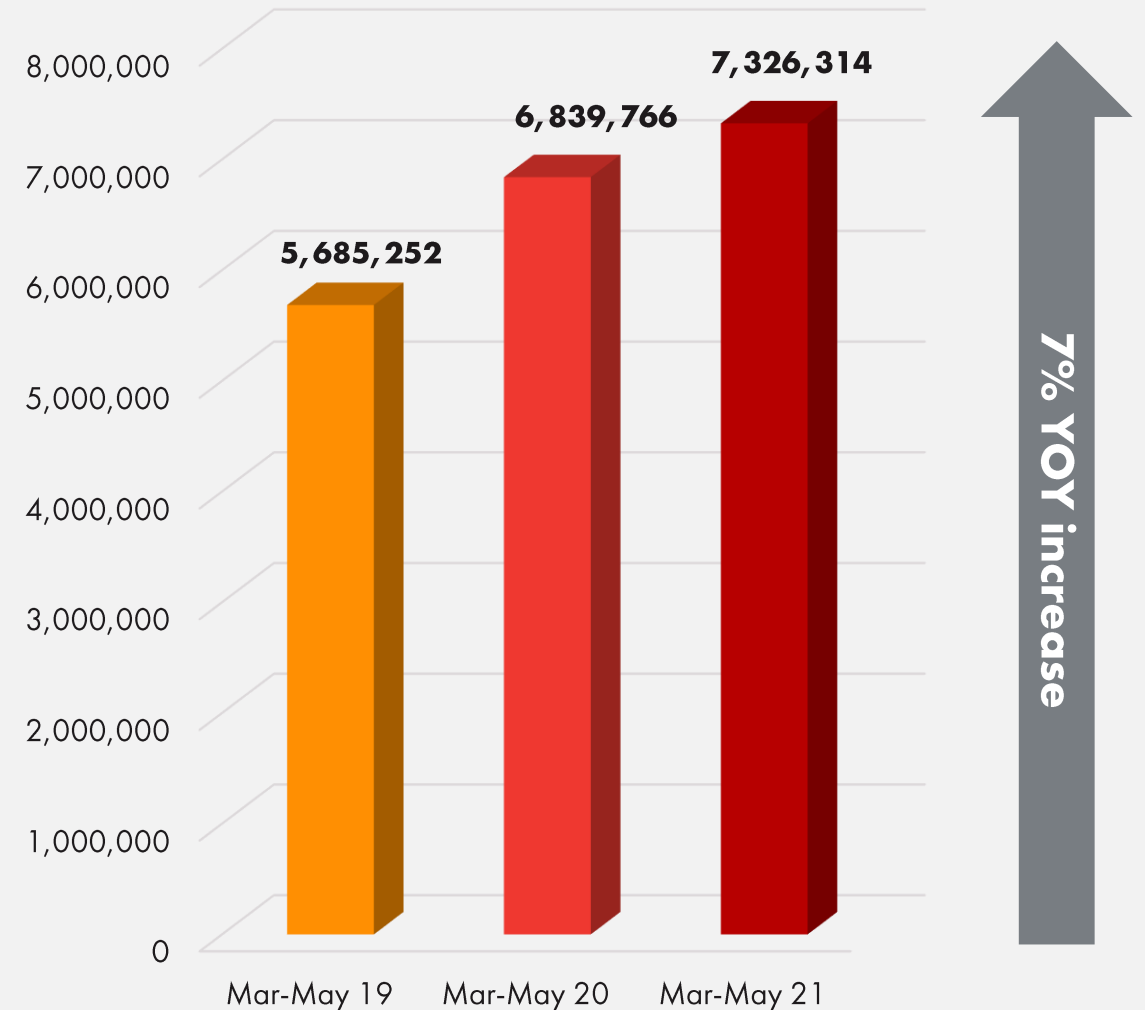
average 6.7 video capable screens per household



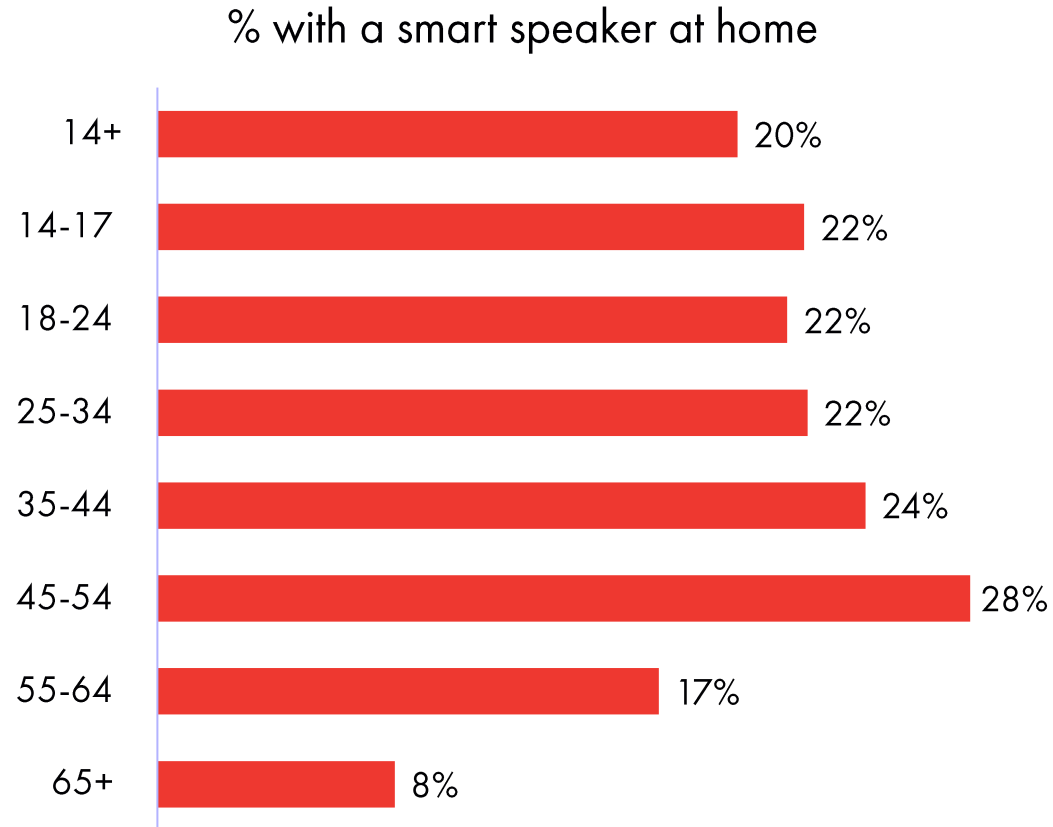
connected tv audience continues to grow.

11 million Australians
have ever viewed Internet content on a TV screen,
over 7 million view daily.

view internet content on a connected tv daily



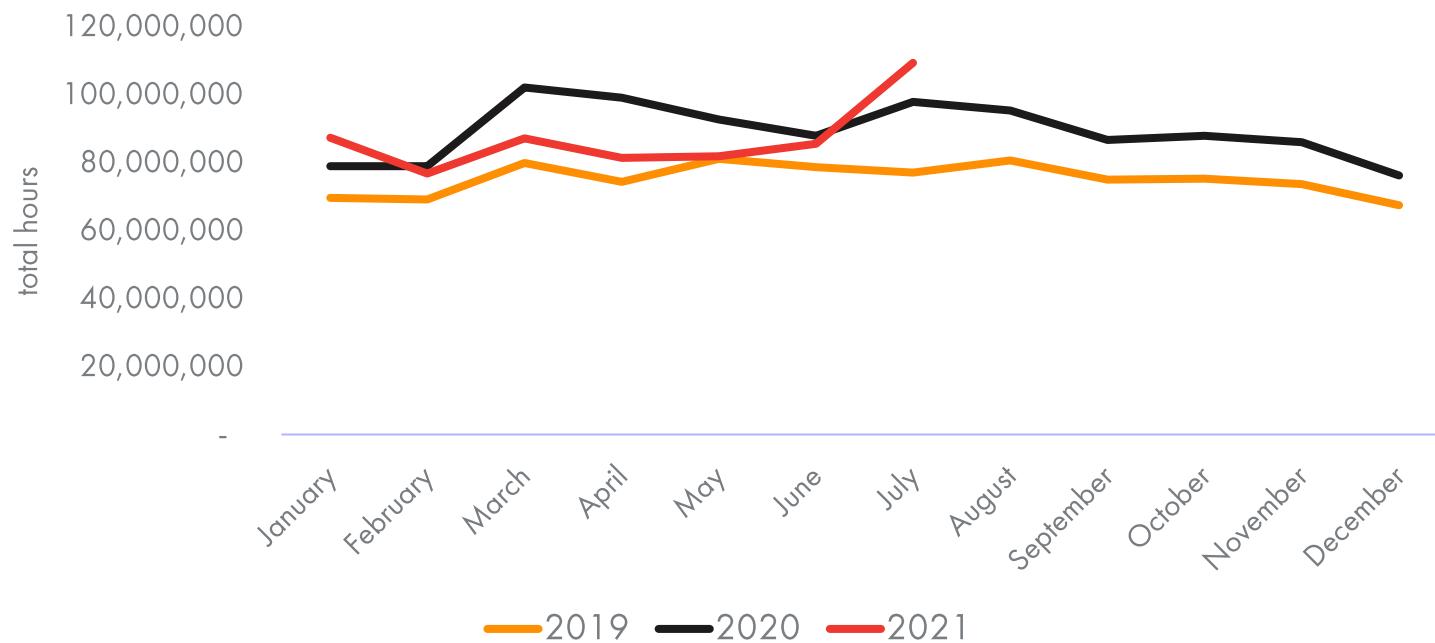
smart speaker ownership at 20% of australians aged 14+.



4.3 million
Australians own
a Smart speaker.
Of these, 33% use
it daily and 65%
at least weekly.

2021 digital content consumption **tracking above 2019** and above this time last year.

total time for total audience of top 150 tagged digital content brands

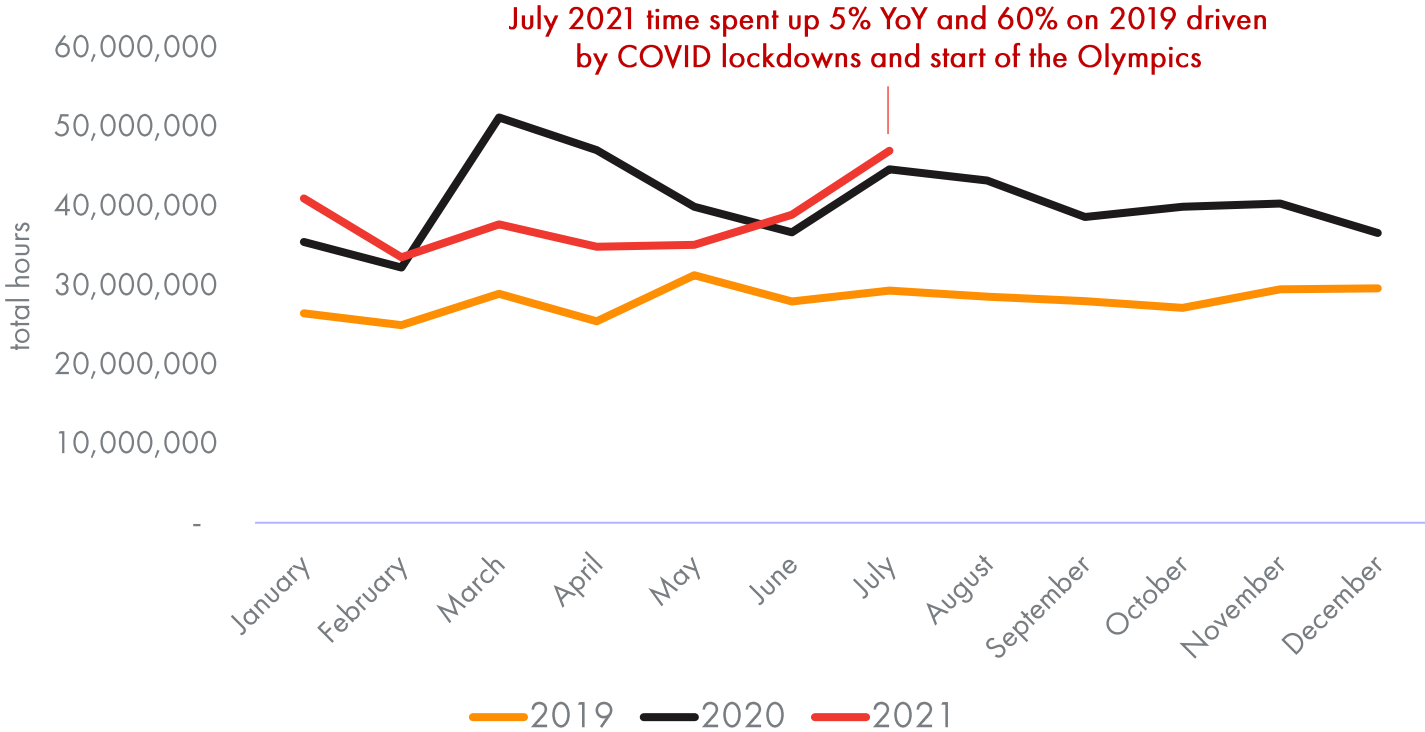


CY to date total time spent on top 150 brands up 15% on 2019



covid lockdowns driving digital news content consumption lift over june and july.

total time spent for total audience of tagged news brands

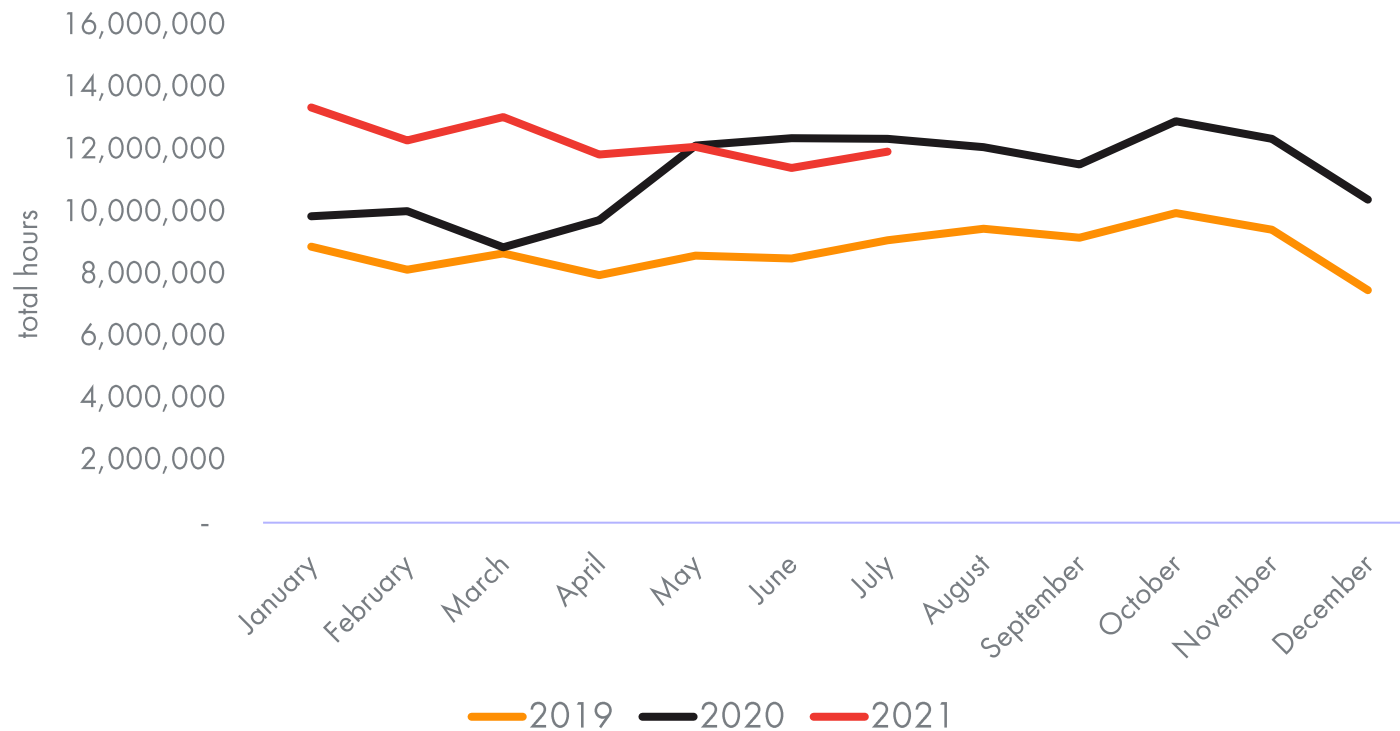


CY to date total time spent on digital news content up 38% on 2019.



market growth **lifted interest in real estate** over the **second half of 2020 and into 2021.**

total time spent for total audience of tagged real estate brands

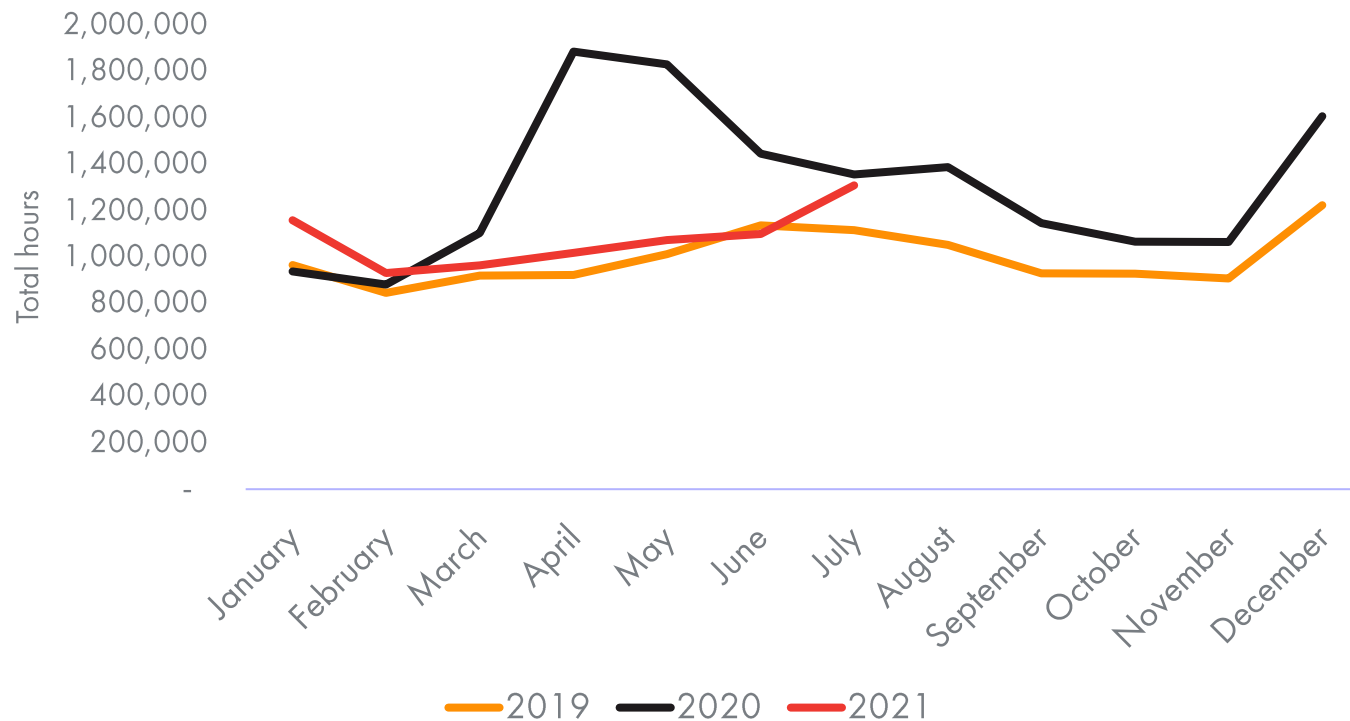


CY to date
total time spent on
real estate content
up 14% YoY and
44% on 2019.



rediscovery of home cooking and recipes lifting online time again in July this year.

total time spent for total audience of tagged food and cooking brands



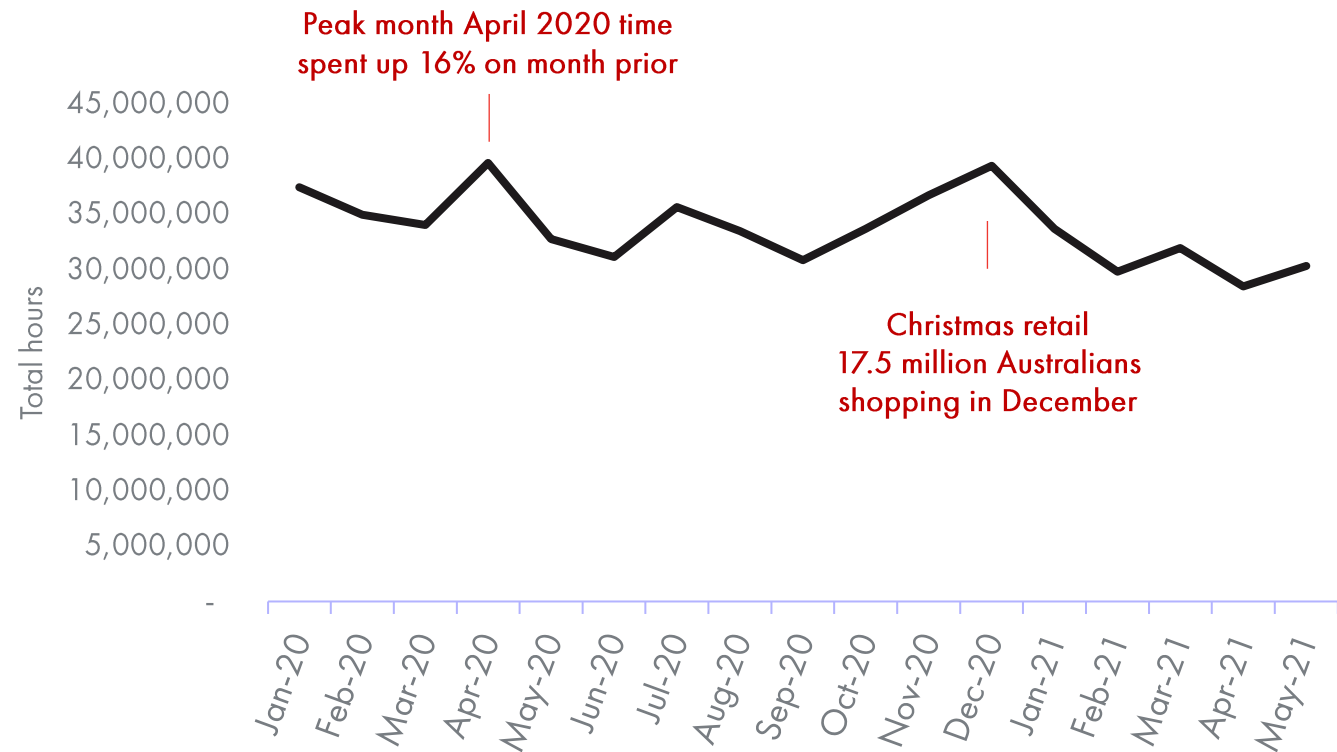
CY to date total time spent on online recipe content up 9% on 2019.



Behavioral shift from covid lockdowns driving up time spent with major retailers online.

On average
17 million
Australians
visited a major
retailer online
each month this
year.

total time spent with online major retailers

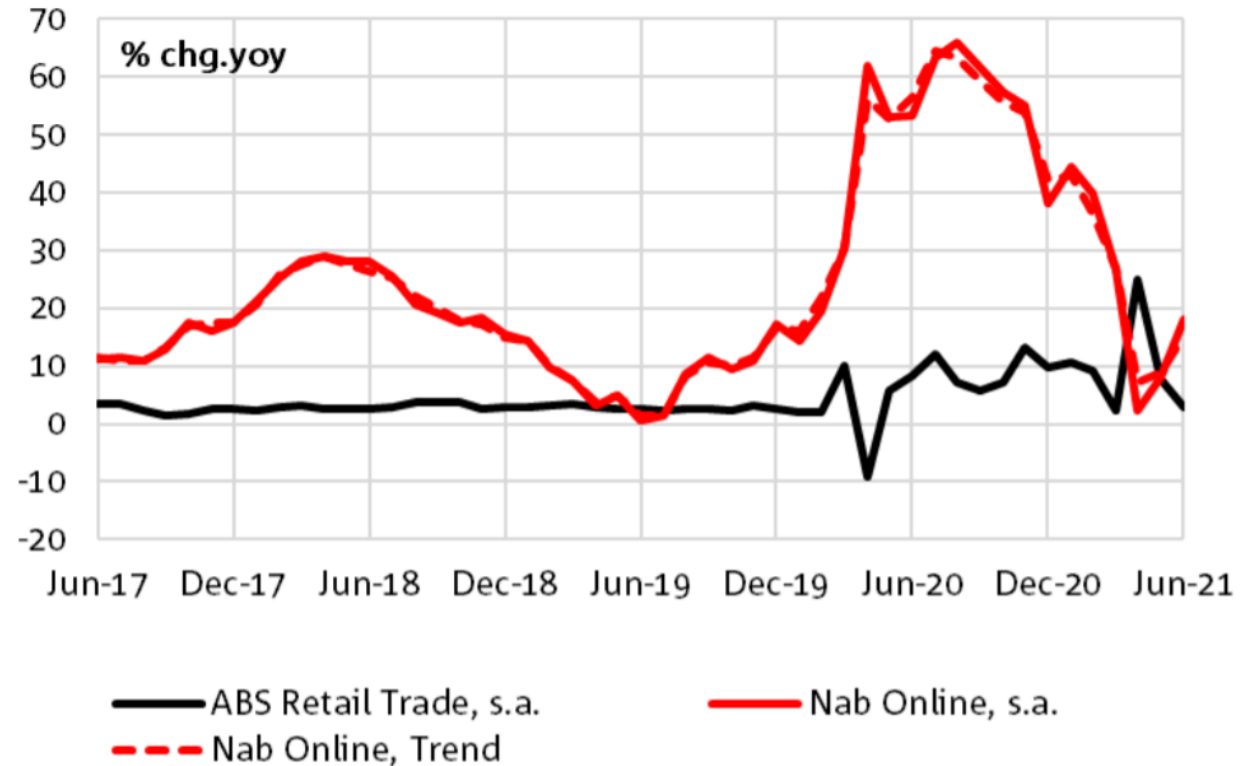


expenditure charts.

australian consumer **online retail spend** has grown **35%** year on year for **FY21**.

Australians spent \$48.6 billion on online retail in FY21, around 13.3% of the total retail trade estimate.

NAB online retail sales and ABS retail sales



online advertising expenditure CY20.

\$ 9.5 billion
Total online advertising market 2020

+2.0%

Online advertising market growth 2020 vs 2019



COVID-19 induced declines in Q2 has resulted in the total online advertising market softening



General display

\$3.7bn

+5.4% on 2019

General Display takes segment share from Classifieds



Search and directories

\$4.3bn

+2.8% on 2019

Continues to be the largest segment of online advertising



Classifieds

\$1.5bn

-7.3% on 2019

Year on year declines are experienced across all industry categories



Mobile

\$5.2bn

+3.7% on 2019

Mobile represents 54% of total online advertising expenditure



Video

\$1.9bn

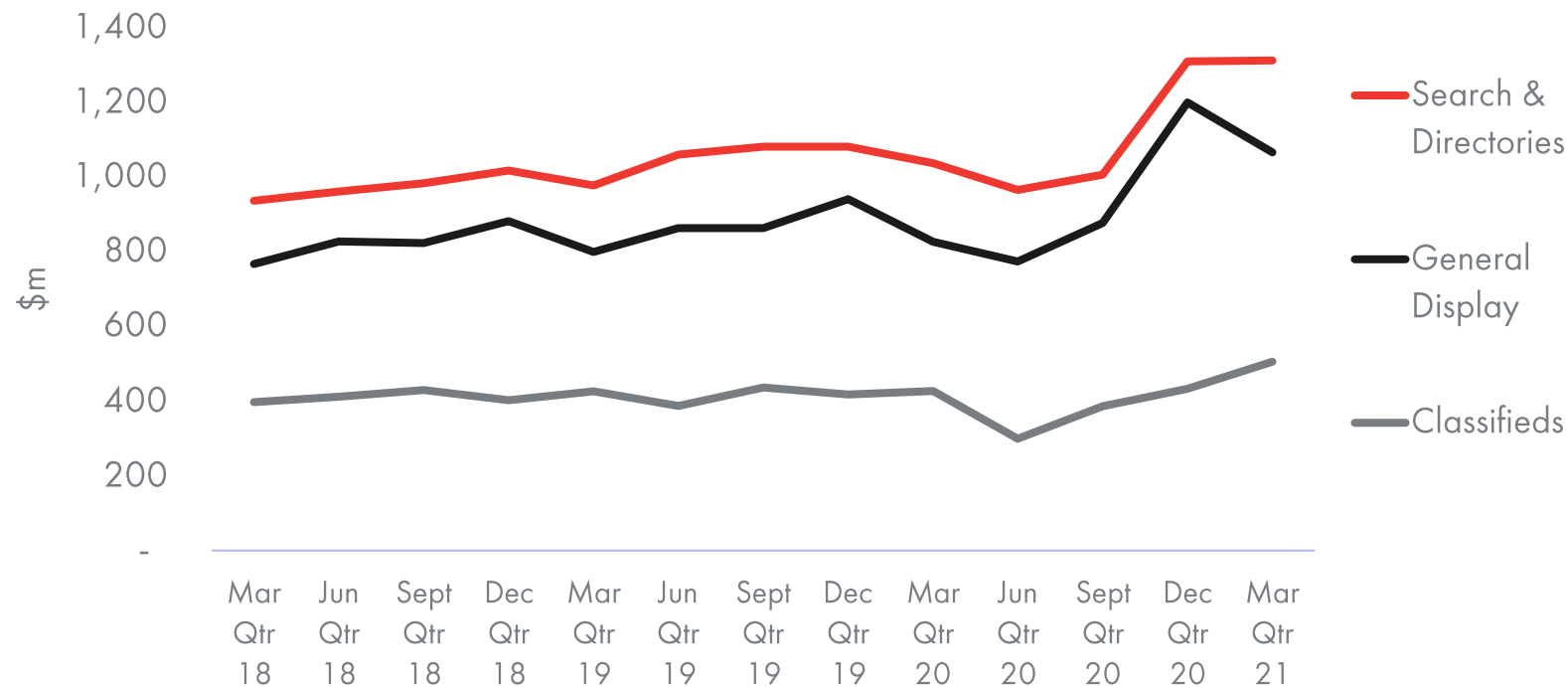
+17.2% on 2019

Share of content publishers' video inventory viewed on a connected TV peaks at 45%



quarterly online advertising expenditure.

quarterly online advertising expenditure



All categories have rebounded from COVID onset decline in first half of 2020



online advertising expenditure comparison.

Globally digital advertising investment outperformed other media channels and saw year on year growth in an economically challenged and unstable environment.

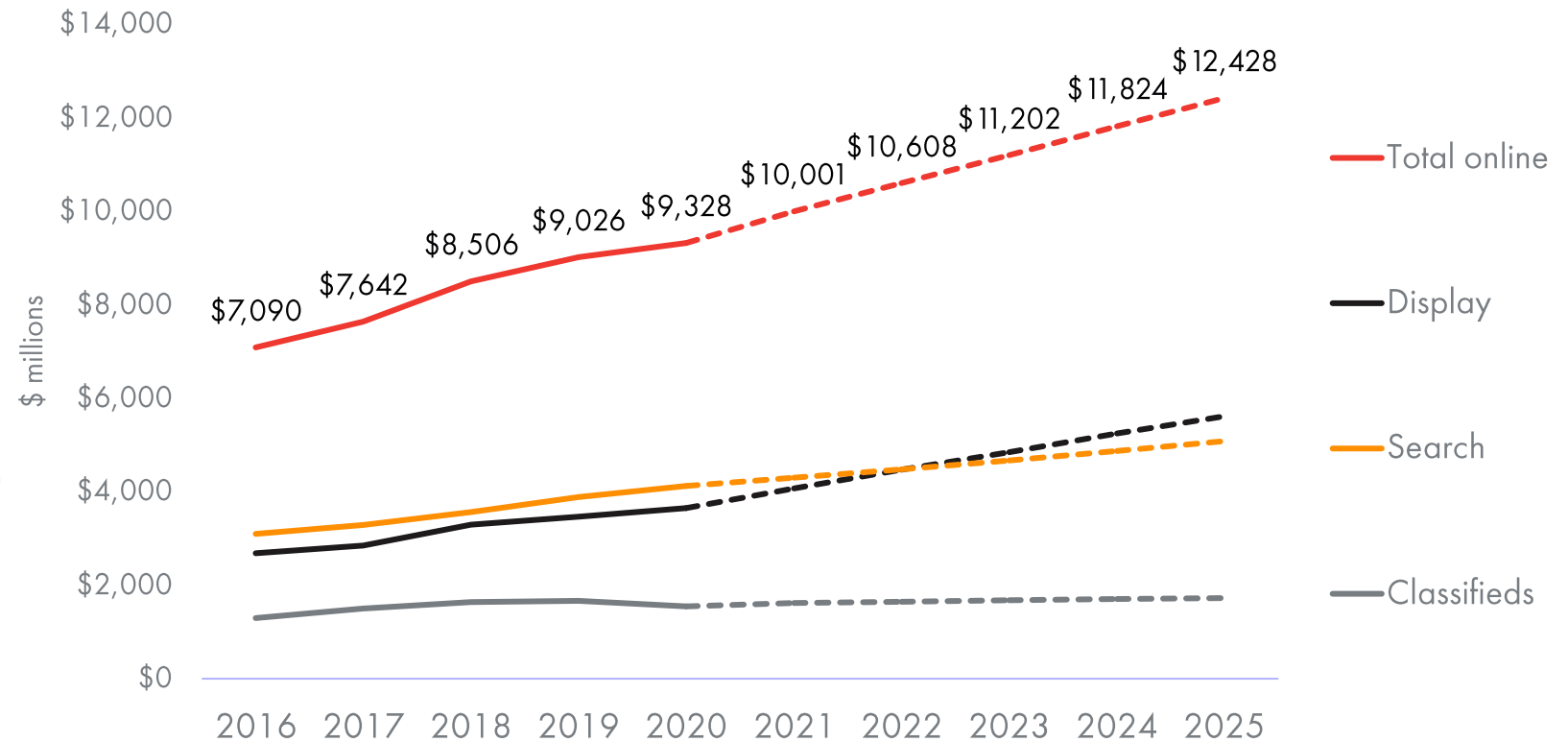
market growth comparison 2020 v 2019

	Australia	UK	US
Total digital market	2%	12%	5%
Display	5%	16%	11%
Video (subset of display)	17%	21%	19%
Search	3%	24%	7%
Classifieds	-7%	2%	-30%



online advertising expenditure forecast.

PWC online media and entertainment report 2021 - 2025
Australian online advertising expenditure forecast (\$ million)



Total online advertising 2019-2025 CAGR 5.5%

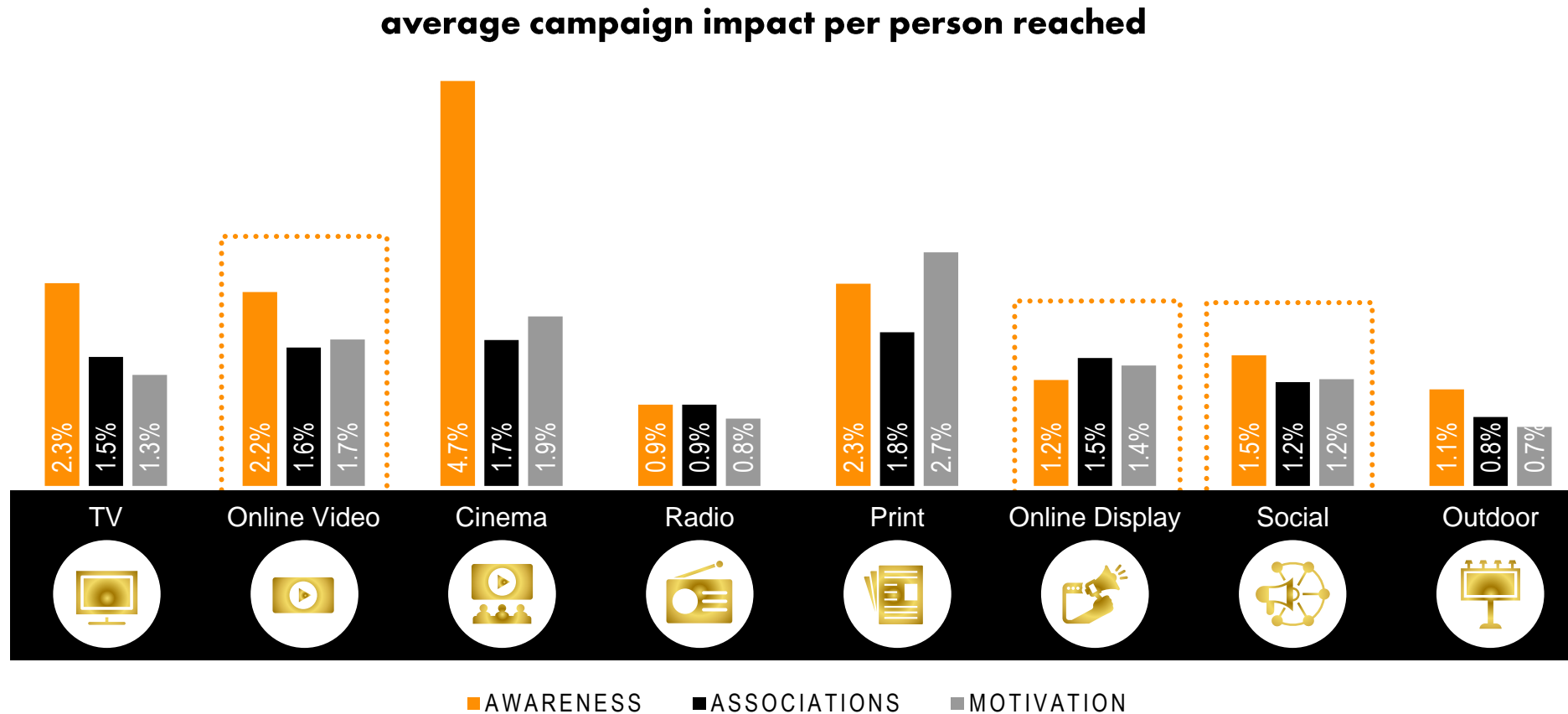
Display CAGR 8.4%, driven by video at 14.5%

effectiveness charts.

all digital formats can help **build brands.**

the digital brand effect

- Kantar's Digital Brand Effect Report with the IAB found digital advertising is effective at delivering brand impact and has a marketing role beyond that of short-term sales

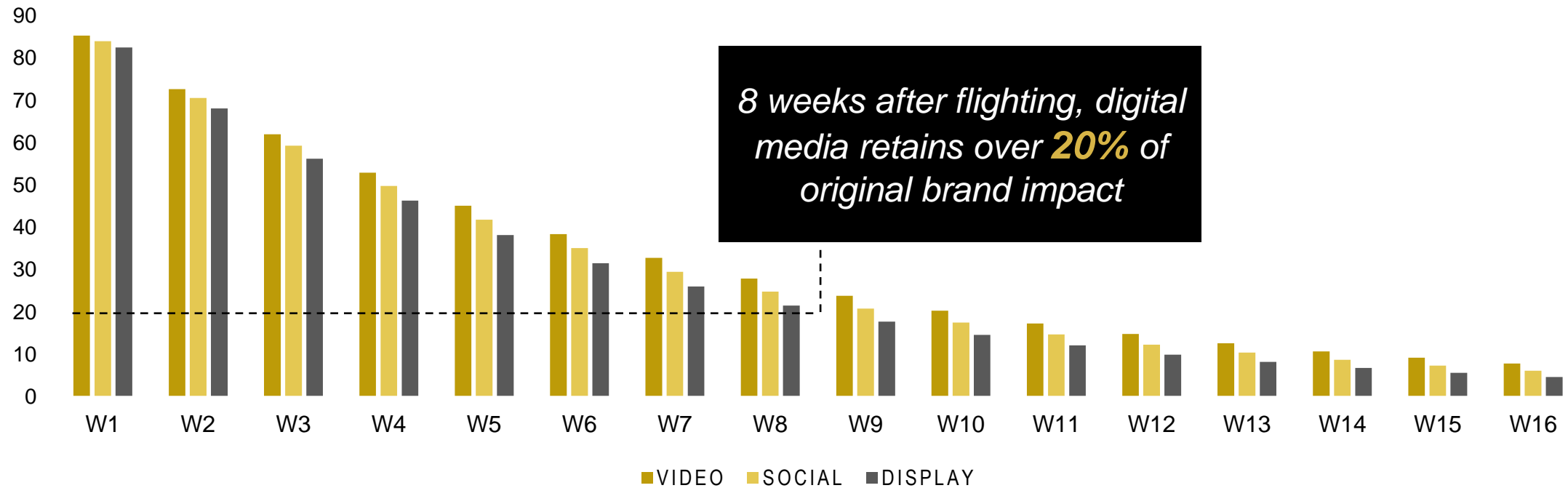


digital retains brand impact.

the digital brand effect

- Kantar's Digital Brand Effect Report with the IAB found that the brand impact of digital campaign exposure is retained well after the campaign ends and this retention is comparable to offline media channels.

% retained brand impact after advertising ends



more research and resources
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