2018 IAB UK & PwC Digital Adspend Study

Measuring the size of the UK digital advertising market
1. Introduction
Background

- Adspend is the official measure of the size of the UK digital advertising market
- A census of major UK media owners and intermediaries
- Adspend — includes desktop, tablet and smartphone
- Only media spend is reported to ensure fair comparison to other media
- Official Advertising Association figures since 1997
- Information collected annually
- Data shown by:
  - Category (display, search & classified)
  - Format (banners, video, etc.)
  - Environment (social vs non-social media)
  - Industry sectors (split by display, search and social)
Digital includes desktop, tablet and smartphone

**Total digital**
- Online advertising viewed on a desktop PC or laptop, accessed via an internet connection
- Advertising that has been specifically tailored and served on a tablet device, accessed via 3G, 4G or Wi-Fi
- Advertising that has been specifically tailored and served on a smartphone device, accessed via 3G, 4G or Wi-Fi (feature phones included)
- All reported data includes desktop, tablet and smartphone unless otherwise stated

**Smartphone only cuts of data**
- Advertising that has been specifically tailored and served on a smartphone device, accessed via 3G, 4G or Wi-Fi (feature phones included)
- For the purpose of this study, advertising on feature phones etc. is also included in this category
- Smartphone only figures are signposted throughout
2.1 Methodology
Reported revenue

- Survey includes UK ad revenues submitted by 64 participants plus additional recruitment sites and TV broadcasters reported by WARC

- The figures are drawn up on the basis of submitter declaration and have not been verified or audited

- Some revenues included in total figures are based on publically available ad revenues
2018 direct submissions

AdMaxim  AD YO LIKE.  AppNexus  ARCHANT  AutoTrader  AWIN
BAUER  Ablis  thebmj  CBS Interactive

affiliate  CONVERSANT™  Collective  CONDE NAST  CRIMTAN®  DAZN  DEEZER  Dennis
ESPN  eXponential marketing intelligence

FT  FINANCIAL TIMES  FUTURE  GroundTruth  gmg  Haymarket
HEARST  IET  IMMEDIATE MEDIA®  iImpact
incisivemedia  INM Independent News & Media  INSKIN  LinkingMobile  MAPP MEDIA
Microsoft  MyOffers

Mobsta  News UK  Optimise  IF PARTNERIZE®  PubMatic  Quantcast  Quidco
RACING POST

Reach  Rakuten  rightmove  Rubicon Project  Samba  SOVRN  Sublime
TAN  THE ATTENTION NETWORK  Teads®

The Student Room  The Telegraph  TT Media  Trade Doubler  venatus  Verizon
vi video intelligence  Yell
Modelled revenue

- Modelling of UK ad revenues for:
  
    Google  Facebook  Twitter  Snapchat  Spotify  Gumtree  Apple  LinkedIn  Amazon  eBay  Indeed  CV Library

As well as: Informa, TES, MVF, Monster, Taboola, Sizmek, Trade Desk, Global Radio, Ad2-One*, ESI, Jobsite, Johnston Press, LoopMe, Outbrain, Mediamath, SuperAwesome

- Modelling is aided by the IAB / PwC Advisory Board and corroborated with additional 3rd party data and industry interviews

- Revenues for video advertising on online TV broadcaster websites and apps are based on WARC estimates

- Except for the above companies, reported figures have not been adjusted for organisations that did not participate in the survey

*i part year only
**Methodology notes**

### Adjustments
- Figures are adjusted for double-counting, based on information provided by survey submitters (e.g. a media owner’s revenue overlapping with an intermediary also submitting to the survey).

### Absolute growth
- Growth rates presented are based on all revenues included in the study. We have modelled revenues for companies with partial or missing submissions.
- In previous years we have given like-for-like growth rates excluding companies that did not submit in either of the years.

### Revenues
- Total digital advertising revenue (as presented in this report) is reported on a gross basis.
- Participants are asked to provide UK only revenues (i.e. ad revenues generated in the UK with advertising served / intended for a UK audience).
Restatements

Figures from previous waves of Adspend are restated, where needed, to offer the most accurate data possible.

Restatements happen when new data points are available to help refine modelling, or when submitters provide more accurate historical data.

2017 restatement - total market:

- Published 2017: £11.553bn
- Restated 2017: £11.683bn

Source: IAB / PwC Digital Adspend Study 2018
2017 recap – digital advertising reached £11.683 billion

Paid for search: £5.821bn
Display: £4.307bn
Classified: £1.470bn
Other: £8.4 million

Source: IAB / PwC Digital Adspend Study 2018
2.2 Headline Results
The total UK digital market in 2018

£13.44bn

15.0% increase

An increase of £1.76bn year-on-year

Source: IAB / PwC Digital Adspend Study 2018
Almost all growth in 2018 is coming from smartphone

£6.88bn

31.5% increase

An increase of £1.65bn year-on-year on smartphone

Source: IAB / PwC Digital Adspend Study 2018
51% of digital advertising is on smartphone

Total digital

<table>
<thead>
<tr>
<th>Year</th>
<th>Total, £ Million</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>£3,692</td>
</tr>
<tr>
<td>2010</td>
<td>£4,242</td>
</tr>
<tr>
<td>2011</td>
<td>£4,975</td>
</tr>
<tr>
<td>2012</td>
<td>£5,613</td>
</tr>
<tr>
<td>2013</td>
<td>£6,436</td>
</tr>
<tr>
<td>2014</td>
<td>£7,547</td>
</tr>
<tr>
<td>2015</td>
<td>£8,620</td>
</tr>
<tr>
<td>2016</td>
<td>£10,111</td>
</tr>
<tr>
<td>2017</td>
<td>£11,683</td>
</tr>
<tr>
<td>2018</td>
<td>£13,439</td>
</tr>
</tbody>
</table>

Smartphone

<table>
<thead>
<tr>
<th>Year</th>
<th>51% of total digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>£38</td>
</tr>
<tr>
<td>2010</td>
<td>£84</td>
</tr>
<tr>
<td>2011</td>
<td>£203</td>
</tr>
<tr>
<td>2012</td>
<td>£526</td>
</tr>
<tr>
<td>2013</td>
<td>£1,021</td>
</tr>
<tr>
<td>2014</td>
<td>£1,631</td>
</tr>
<tr>
<td>2015</td>
<td>£2,509</td>
</tr>
<tr>
<td>2016</td>
<td>£3,786</td>
</tr>
<tr>
<td>2017</td>
<td>£5,234</td>
</tr>
<tr>
<td>2018</td>
<td>£6,884</td>
</tr>
</tbody>
</table>

Source: IAB / PwC Digital Adspend Study 2018
“Market growth remained both strong and concentrated, mainly for the same reason: the appeal of search and online video advertising for an exceedingly broad advertiser base. The flexibility and measurable performance of top online advertising platforms attracts small businesses, trade promotion budgets and big brand advertisers alike.”

Matti Littunen, Enders Analysis
2.3 The Digital Media Mix
### Display:

- Standard display banners
- Native advertising (inc. in-feed and native distribution)
- Paid sponsored content
- Interruptive formats
- Display ads on email
- Tenancies
- Pre-mid-post roll video
- Outstream / social in-feed video

### Search

- Paid for search

### Classified

- Recruitment classified
- Other classified

### Other

- Solus email
- Audio advertising
- Lead generation
- Mobile SMS/MMS
- Ads in or around games
Display accounts for 39% of all digital ad spend

Paid for search: 50%
Display: 39%
 Classified: 11%
Other: < 1%

2018 total £13.44bn

Search 50%, Display 37% Classified 13%, Other < 1%

Source: IAB / PwC Digital Adspend Study 2018
Smartphone is almost entirely display and search advertising

Paid for search: 49%  
Display: 50%  
Classifieds / Other: < 1%

2018 Smartphone total £6.88bn  
Search 50%, Display 49%, Classifieds/Other < 1%

Source: IAB / PwC Digital Adspend Study 2018
Growth for display has accelerated over the past year

- **Paid for search** +14%
- **Display** +22%
- **Classifieds** -1%

**Total, £ Million**

- 2014: £1,262
- 2015: £1,301
- 2016: £1,484
- 2017: £1,470
- 2018: £1,451

Source: IAB / PwC Digital Adspend Study 2018
Smartphone display has grown at a faster rate than search

Display +35%
Paid for search +29%

Total, £ Million

- £812
- £1,246
- £1,918
- £2,623
- £3,455

Classifieds / Other

- £800
- £1,238
- £1,841
- £2,568
- £3,373

Source: IAB / PwC Digital Adspend Study 2018
Search
51% of all search spend is on smartphone

12% 17% 21% 30% 38% 45% 51% % of search on smartphone

Total search

£3,087 £3,471 £3,768 £4,137 £5,006 £5,821 £6,656

Smartphone search

£365 £581 £800 £1,238 £1,918 £2,623 £3,373

Source: IAB / PwC Digital Adspend Study 2018
“As with other digital media channels, growth in search investment on mobile has historically lagged behind the amount of time spent on the device. So it’s not a huge suprise to see that the bulk of growth in search spend over the last 12 months has come from mobile - the market is just playing catch up.”

Neil Bruce, Mindshare
Display
66% of display is now on smartphone

<table>
<thead>
<tr>
<th>Year</th>
<th>Total display</th>
<th>Smartphone display</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>£1,479</td>
<td>£150</td>
</tr>
<tr>
<td>2013</td>
<td>£1,825</td>
<td>£424</td>
</tr>
<tr>
<td>2014</td>
<td>£2,421</td>
<td>£812</td>
</tr>
<tr>
<td>2015</td>
<td>£3,088</td>
<td>£1,246</td>
</tr>
<tr>
<td>2016</td>
<td>£3,544</td>
<td>£1,841</td>
</tr>
<tr>
<td>2017</td>
<td>£4,307</td>
<td>£2,568</td>
</tr>
<tr>
<td>2018</td>
<td>£5,249</td>
<td>£3,455</td>
</tr>
</tbody>
</table>

Source: IAB / PwC Digital Adspend Study 2018
Video is the largest display format

Video:
44%  
£2,307m

Sponsored Content:
3%  
£167m

Banners:
28%  
£1,486m

Native:
23%  
£1,192m

Other:
2%  
£97m

Source: IAB / PwC Digital Adspend Study 2018
Video is driving the majority of growth in display

Video:
- 2017: £1,739m
- 2018: £2,307m
- Growth: 33%

Banners:
- 2017: £1,312m
- 2018: £1,486m
- Growth: 13%

Native:
- 2017: £1,032m
- 2018: £1,192m
- Growth: 15%

Sponsored content:
- 2017: £124m
- 2018: £167m

Other:
- 2017: £101m
- 2018: £97m
- Decline: 4%

Source: IAB / PwC Digital Adspend Study 2018
81% of smartphone display is video and native

Video:
- 51% (£1,748m)

Native:
- 30% (£1,047m)

2018 Smartphone Display Total: £3.45bn

- Standard display*: 16% (£566m)
- Remaining display formats**: 0.7% (£24m)
- Sponsored Content: 2% (£70m)

* Standard display includes embedded banner and MPU formats
** Remaining display formats include tenancies, interstitials and other display formats outside of the above

Source: IAB / PwC Digital Adspend Study 2018
Smartphone video shows strong growth

- **Video**: £1,748m (up 45% from £1,202m)
- **Native**: £1,047m (up 17% from £895m)
- **Standard display**: £566m (up 36% from £418m)
- **Sponsored content**: £70m (up 189% from £24m)
- **Remaining display formats**: £29m (£24m)

Source: IAB / PwC Digital Adspend Study 2018
Video
76% of all video spend is on smartphone

Total Video

Smartphone 76% of total video

Desktop/tablet 24% of total video

Source: IAB / PwC Digital Adspend Study 2018
“As the quality of smartphone handsets continues to improve with bigger, better, higher quality screens coupled with faster WIFi or 4G connectivity and affordable data plans, users are spending more time consuming more video content on their phones. And the more content that is consumed the more ad opportunities they are presented with.

It’s not only the experience and accessibility that is improving but the ad formats themselves. Clients and planners are now thinking mobile first and using mobile formats that fit with how users consume content on their phones.”

Dave Foster, Dentsu Aegis
Outstream has increased its majority of total video spend

Video spend over time:

<table>
<thead>
<tr>
<th>Year</th>
<th>Million</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>£130</td>
</tr>
<tr>
<td>2016</td>
<td>£510</td>
</tr>
<tr>
<td>2017</td>
<td>£606</td>
</tr>
<tr>
<td>2018</td>
<td>£900</td>
</tr>
</tbody>
</table>

Total: £2,307

Outstream: £1,306 (52%)
Pre-mid-post: £960 (46%)
Other: £40 (2%)

Pre-mid-post roll:

- 42% (£960m)

Outstream / social in-feed:

- 57% (£1,306m)

Video total for 2018: £2.31bn

Source: IAB / PwC Digital Adspend Study 2018
59% of pre-mid-post roll video is non-broadcaster VOD

Non-broadcaster VOD: 59%  £570m

Broadcast VOD: 41%  £390m

2018 total pre-mid-post roll £960m

2017:
Non-broadcaster 62%
Broadcast 38%

Source: IAB / PwC Digital Adspend Study 2018
Outstream over-indexes on smartphone

Desktop / Tablet total: £559m

17% £92m
5% £27m
79% £440m

Smartphone total: £1,748m

69% £1,214m
1% £13m
30% £521m

Source: IAB / PwC Digital Adspend Study 2018
“More advertisers than ever have committed to maximise the potential impact of their campaigns by customising video creative for digital platforms. Whilst we still clearly see the importance of TV’s digitally migrating audience, offering opportunities for impactful 30” copy on broadcasters’ digital platforms, we can’t forget the positive impact that video ads created specifically for digital platforms provide.”

Dave Counsell, the7stars
Native
The majority of native advertising is in-feed

Native distribution:
9% 
£107m

In-feed:
91%
£1,084m

2018 total native £1,192m

2017:
Native distribution 8%
In-feed 92%

Source: IAB / PwC Digital Adspend Study 2018
Almost all native advertising on smartphone is in-feed

Desktop / Tablet total: £145m

Native distribution: 39% £57m

In-feed: 61% £88m

Smartphone total: £1,047m

Native distribution: 5% £51m

In-feed: 95% £996m

Source: IAB / PwC Digital Adspend Study 2018
Social revenue is now £3.04bn, 23% of all digital ad spend

Source: IAB / PwC Digital Adspend Study 2018
80% of all social spend is on smartphone

Smartphone: 80% £2,438m
Desktop & tablet: 20% £606m

2018 total social £3,044m
2017:
Smartphone 83%
Desktop & tablet 17%

Source: IAB / PwC Digital Adspend Study 2018
58% of all display is being served in a social environment

2018 Display total: £5.25bn

- Non-social: 42% (£2,205m)
- Social: 58% (£3,044m)

- Non-social video: 22% (£503m)
- Social video: 78% (£1,804m)

- Non-social banners: 89% (£1,316m)
- Social banners: 11% (£170m)

- Non-social native: 10% (£122m)
- Social native: 90% (£1,070m)

Source: IAB / PwC Digital Adspend Study 2018
71% of all smartphone display is served in a social environment.

2018 Smartphone Display Total: £3.45bn
- Non-social: 29% (£1,017m)
- Social: 71% (£2,437m)

Non-social video: 22% (£387m)
- Non-social native: 6% (£60m)
- Non-social standard display*: 84% (£476m)

Social video: 78% (£1,361m)
- Social native: 94% (£987m)
- Social standard: 16% (£90m)

* Standard display includes embedded banner and MPU formats
Source: IAB / PwC Digital Adspend Study 2018
Classifieds
Recruitment makes up 50% of all classified spend

Source: IAB / PwC Digital Adspend Study 2018
2.4 Industry Sectors
Reported revenue

- Data collected from 5 out of 7 UK media agency groups
- Except for these groups, figures have not been adjusted for other organisations
- Display: all paid media space that isn’t search
- Social: display advertising across all social networking sites
- Non-social display: display advertising across all non-social networking sites
- Paid for search data does not account for search bought directly (i.e. not through a media agency)
Industry sectors: total display advertising

Consumer goods: 11.54% ↑ 0.3%
Retail: 10.90% ↑ 0.5%
Automotive: 8.59% ↓ -2.8%
Financial services & insurance: 8.32%
Consumer electronics: 6.47%
Travel, tourism & hospitality: 6.19%
Computers & software: 5.95%
Beauty, grooming & personal care: 4.56%
Toys & video games: 3.90%
Clothing & fashion accessories: 3.78%
Entertainment: 3.52%
Telecommunications: 2.87%
Media: 2.58%
Restaurants: 2.38%
Business services & industrial: 2.17%

For sector definitions see appendix
Top 15 categories are displayed
Source: IAB / PwC Digital Adspend Study 2018
Industry sectors: social networking sites

<table>
<thead>
<tr>
<th>Sector</th>
<th>Year-on-year % increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer goods</td>
<td>13.52%</td>
</tr>
<tr>
<td>Retail</td>
<td>11.33%</td>
</tr>
<tr>
<td>Clothing &amp; fashion accessories</td>
<td>6.80%</td>
</tr>
<tr>
<td>Consumer electronics</td>
<td>6.71%</td>
</tr>
<tr>
<td>Financial services &amp; insurance</td>
<td>6.58%</td>
</tr>
<tr>
<td>Computers &amp; software</td>
<td>6.30%</td>
</tr>
<tr>
<td>Automotive</td>
<td>6.25%</td>
</tr>
<tr>
<td>Travel, tourism &amp; hospitality</td>
<td>4.55%</td>
</tr>
<tr>
<td>Toys &amp; video games</td>
<td>4.53%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>4.05%</td>
</tr>
<tr>
<td>Media</td>
<td>3.59%</td>
</tr>
<tr>
<td>Beauty, grooming &amp; personal care</td>
<td>3.35%</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>2.94%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>1.82%</td>
</tr>
<tr>
<td>Business services &amp; industrial</td>
<td>1.37%</td>
</tr>
</tbody>
</table>

Top 3 year-on-year % point increase:
- Consumer goods: 13.52% (up 1.5%)
- Retail: 11.33% (up 1.8%)
- Clothing & fashion accessories: 6.80% (up 0.6%)

Source: IAB / PwC Digital Adspend Study 2018
### Industry sectors: non-social networking sites (display only)

<table>
<thead>
<tr>
<th>Industry</th>
<th>Year-on-Year % Point Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer goods</td>
<td>10.86% ↑ 0.8%</td>
</tr>
<tr>
<td>Retail</td>
<td>10.75% ↑ 0.1%</td>
</tr>
<tr>
<td>Automotive</td>
<td>9.40% ↓ -2.6%</td>
</tr>
<tr>
<td>Financial services &amp; insurance</td>
<td>8.93%</td>
</tr>
<tr>
<td>Travel, tourism &amp; hospitality</td>
<td>6.76%</td>
</tr>
<tr>
<td>Consumer electronics</td>
<td>6.39%</td>
</tr>
<tr>
<td>Computers &amp; software</td>
<td>5.82%</td>
</tr>
<tr>
<td>Beauty, grooming &amp; personal care</td>
<td>4.99%</td>
</tr>
<tr>
<td>Toys &amp; Video Games</td>
<td>3.69%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>3.34%</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>2.85%</td>
</tr>
<tr>
<td>Clothing &amp; fashion accessories</td>
<td>2.73%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>2.58%</td>
</tr>
<tr>
<td>Business services &amp; industrial</td>
<td>2.44%</td>
</tr>
<tr>
<td>Media</td>
<td>2.23%</td>
</tr>
</tbody>
</table>

For sector definitions see appendix
Top 15 categories are displayed
Source: IAB / PwC Digital Adspend Study 2018
Industry sectors: paid search

Top 3 year-on-year % point increase

- Retail: 17.87% ↑ 3.1%
- Automotive: 10.72% ↓ -4.1%
- Financial services & insurance: 9.05% ↑ 1.6%
- Travel, tourism & hospitality: 8.18%
- Consumer electronics: 7.91%
- Clothing & fashion accessories: 7.16%
- Telecommunications: 5.81%
- Computers & software: 5.20%
- Business services & industrial: 3.12%
- Media: 2.38%
- Beauty, grooming & personal care: 2.38%
- Toys & video games: 1.61%
- Oil, gas, energy & utilities: 1.56%
- Entertainment: 1.55%
- Consumer goods: 1.55%

For sector definitions see appendix
Top 15 categories are displayed
Source: SMI Ad Market Tracker, FY 2018
2.5 Forecast & Summary
2019 full year forecast

<table>
<thead>
<tr>
<th>GroupM</th>
<th>Full year 2019 forecast</th>
</tr>
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<tbody>
<tr>
<td>UK Advertising Market</td>
<td>+5%</td>
</tr>
<tr>
<td>Digital*</td>
<td>+9%</td>
</tr>
<tr>
<td>Display*</td>
<td>+11%</td>
</tr>
<tr>
<td>Search</td>
<td>+9%</td>
</tr>
</tbody>
</table>

* Pure play only i.e. does not contain broadcaster VOD, DOOH or digital newsbrands

Source: GroupM TYNY Report, Nov 2018
2018 Summary

- The total UK digital advertising market in 2018 is worth £13.44bn
- Smartphone is driving almost all growth in the market
- At £6.88bn, smartphone now makes up 51% of all digital spend
- Video is larger than standard display banners, up 33% year-on-year
- Outstream / social in-feed has increased its share as the largest video format, now 57% of all video
- 76% of all video spend is on smartphone
- Social revenue is now 23% of all digital spend

Source: IAB / PwC Digital Adspend Study 2018
2.6 Appendix
SMI industry sector definitions

Automotive

Beauty, Grooming & Personal Care
Hair Care: Hair dryers, hair straighteners, shampoos, conditioners, hair styling products, hair coloring products, hair salons, barbershops. Makeup, Fragrances & Grooming: Cosmetics, fragrances, colognes, makeup, lipstick, foundation, nail polish. Oral Care: Toothbrushes, toothpaste, mouthwash, dental floss, tooth picks. Personal Hygiene & Shaving: Aftershaves, shaving cream, electric razors, razor blades, products used for personal hygiene such as condoms, lubricants, tampons, sanitary napkins, diapers. Skin Care: Sunscreen, tanning lotions & creams, lip balms, all skin creams not used for a specific medical purpose or ailment (such as a non-prescription acne cream). Brand Examples: Head & Shoulders; Maybelline; Crest; Degree; Olay

Building & Construction
Construction Equipment: Tractors, heavy duty machinery, construction companies, raw construction materials, concrete, paving, masonry, lumber, insulation, wallboard, roofing, siding. Paint & Home Improvement: Paint, brushes, finishes, coatings, portable hand and power tools, or equipment that would be used in the building or improving of any physical structures. Plumbing, HVAC & Bathroom Fixtures: Sinks, faucets, bathtubs, toilets, heating & cooling equipment Brand Examples: Benjamin Moore Paint; American Standard; Kohler

Business Services & Industrial
Business, Courier, Legal & Management Services: Legal services, auction houses, funeral homes, courier services, consultants, other various business services. Consumer review websites that do not solely focus on another SMI Category. Employment & Recruitment Services: Recruitment or employment agencies or websites and services used for career development. Brand Examples: FedEx; Legalzoom; Monster.com; TheLadders. Manufacturing Materials & Equipment: Military & aviation equipment, chemical companies, aircraft manufacturers, and any type of electronics or machinery used for industrial production. Brand Examples: John Deere; Boeing

Source: SMI Ad Market Tracker, FY 2018
SMI industry sector definitions

Clothing & Fashion Accessories
Clothes & Apparel: Dresses, suits, dress shirts, formal wear, bridal wear, jackets, coats, jeans, pants, underwear, lingerie, socks, bras, hosiery etc. (excludes sports apparel & footwear). Fashion Accessories: Handbags, luggage, wallets, ties, belts, gloves, hats, scarfs, sunglasses and all other types of fashion accessories. Jewelry & Watches. Shoes, Boots & Footwear: Casual & dress shoes, boots, sandals, slippers, and other types of non-sports related footwear. Brand Examples: DKNY; Samsonite luggage; Omega watches; Hunter boots

Computers & Software
Internet & Software Companies: Software, technology, data storage, networking services & equipment, social networking companies. Brand Examples: Facebook; Oracle; Salesforce. PCs & Laptops: Computers, hardware, computer components. Printers & Office Machines: Printers, scanners, ink, office machine peripherals, multi-function office machines, copiers, label-makers etc.

Consumer Electronics
Cameras & Camcorders. Portable Electronic Gadgets: iPods, MP3 players, portable media players, navigation/GPS systems. Smartphones & Tablets: Mobile phone or hand held mobile tablets built on a mobile operating system, with more advanced computing capability connectivity than a feature phone. TVs & Home Entertainment Equipment: TVs, DVD players, home theatre sound system equipment, speakers, Blu-ray players. Brand Examples: Dell; Canon Powershot; Canon Prixima; iPod; Samsung Galaxy; LG TV

Source: SMI Ad Market Tracker, FY 2018
SMI industry sector definitions

Consumer Goods (Food produce, dairy, drinks, household supplies)

Entertainment
Books: Book publishing houses, actual book titles, electronic books. Motion Pictures: Theatrical movie releases. Online Ticketing & Entertainment Websites. Pre-recorded media content: DVDs, home videos, CD's, pre-recorded music or non-internet based video. Spectator Sports, Concerts & Live Entertainment: Professional sports team, athletic leagues, opera houses, symphonies, music concerts, festivals, museums, zoos, live entertainment etc. Brand Examples: Little Brown & Co.; Avengers Age of Ultron (Theatrical Release); Fandango; Spotify; NY Giants

Financial Services & Insurance
Banking: Banks, financial exchanges, boards of trade, savings & checking accounts, mortgages, personal loans & corporate loans / lending. Credit Cards: Credit cards, credit card companies, traveler's checks, bank gift cards. Investment Products & Services: Stocks, Bonds, Mutual Funds, Retirement Accounts, Pensions, Asset management & other forms of investments. Brand Examples: HSBC; Capital One; American Express; Charles Schwab. Insurance: automobile, life, home, health, dental & any other form of insurance Brand Examples: Geico; Allstate; Liberty Mutual

Source: SMI Ad Market Tracker, FY 2018
SMI industry sector definitions

Health & Medical
Health/Fitness Facilities & Services: Gyms, fitness centers, diet programs, and health-related websites. Supplements & Vitamins: Vitamins, minerals, weight loss, health & nutritional supplements not sold in food form. Brand Examples: NY Sports Club; LA Fitness; South Beach Diet; Centrum. Medical Equipment & Facilities: Hospitals & Medical Centers: Hospitals, health service centers, nursing homes, doctors, veterinarians, medical centers, hospices. Medical Equipment & Supplies: Medical equipment, heart monitors, pregnancy tests, first aid equipment, bandages, braces, crutches, contact lenses, hearing aids, canes, walkers, and any other piece of medical equipment or device needed to treat or manage a medical problem or ailment. Brand Examples: First Response; Acuvue

Media
TV Networks: Cable and Network television stations, and TV networks/channels. Brand Examples: HBO; AMC; CBS; CW Magazines: Consumer, trade, weekly, monthly, annually, bi-annually, quarterly, and all other forms of print publications in a magazine format. Media Websites & Content Providers. Newspapers: Dailies, local, community papers, and all other forms of print publications in newspaper format. Radio: Satellite, terrestrial, digital, local, national, syndication, college and or student radio. Brand Examples: Vogue; NYTimes; Sirius Radio

Oil, Gas, Energy & Utilities
Electricity & Water: Electricity and water companies. Gasoline & Oil: Petroleum companies, gasoline, and oil companies. Power & Energy: Power & energy companies, Natural energy, windmills etc. Brand Examples: ConEd; BP; Exxon

Organizations & Associations
Charitable, Health & Humanitarian: Charities, societies, institutions, associations. Labor Unions & Advocacy Groups: Non-government affiliated political groups, unions, lobbyist groups. Brand Examples: Ronald McDonald House; United Way; Teachers Union; Corn Refiners Association

Retail
Department Stores: Retail establishment which sells a wide range of durable good and products while offering consumers a wide variety selection amongst various merchandise lines at variable price points in all product categories. Brand Examples: Macy’s; JCPenny; Dillard’s. Specialty Retailers: Retail chains our outlets that specialize in one or more particular industries or segments. Brand Examples: Gap; Victoria Secret; Sunglass Hut. Discount Stores: Wholesale clubs and discount retail establishments that sell a variety of goods at less than normal retail prices. Online Retailers: Retail stores that specialize or only participate in online sales. Supermarkets, Convenience & General Stores. Brand Examples: Coscos; Amazon; Duane Reade

Source: SMI Ad Market Tracker, FY 2018
SMI industry sector definitions

Toys & Video Games
Dolls & Action Figures: Action figures, figurines, dolls. Interactive Entertainment: Video games, video game manufacturers, video game websites, online and or internet games, video games consoles. Toys & Games: Board games, card games, collector’s cards, playing cards, various toys Brand Examples: Barbie; X-Box; Scrabble

Travel, Tourism & Hospitality
Airlines: Commercial airlines. Cruise Lines: Commercial cruise lines. Excludes travel websites that may specialize in cruise vacations. Only cruise lines, Hotels & Casino Resorts: Includes both foreign and domestic luxury and lower class hotels, motels, hostels, casinos, destination resorts, and other forms of vacation and or temporary hospitality. Tourism Bureaus: Local & national government tourism bureaus, individual state and or city tourism campaigns and websites, local and or national CVBs. Travel Services & Websites: Various online travel booking and or review sites, travel agents, travel centers, car rental companies, tour companies, and other various forms of travel or vacation services. Brand Examples: Jet Blue; Royal Caribbean; Mohegan Sun; Aruba Tourism; Orbitz

Restaurants
Casual & Upscale Dining: Steakhouses, non-chain restaurants, sit-down upscale fine dining establishments Brand Examples: TGI Fridays; IHOP; Olive Garden Ice Cream, Coffee & Pastry Shops, Bakeries, cafes, coffee houses, donuts shops etc. Pizza Eateries: Quick-Serve and or sit-down pizza specialty restaurants. Quick Serve Restaurants: Fast food, sit-down and or drive through restaurants Brand Examples: Dunkin Donuts; Pizza Hut; McDonalds

Source: SMI Ad Market Tracker, FY 2018