

**WHITE PAPER**  
**ON THE STATE OF THE AUSTRALIAN ADVERTISING INDUSTRY**  
**AND THE ROLE OF EDUCATION**

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Celebrating 50 years of advertising education in Australia, the White Paper draws from secondary and primary research, as well as the insight of the industry's top leaders, to provide an important benchmark for the industry and advertising education and develop a number of predictions.

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# WHITE PAPER ON THE STATE OF THE AUSTRALIAN ADVERTISING INDUSTRY AND THE ROLE OF EDUCATION

## ABSTRACT

Fifty years ago, the first ever complaint about an ad was made to the newly formed Advertising Standards Council. At least three-quarters of the Australian advertising business was owned by American agencies, necessitating an Australian voice and the formation of the Advertising Federation of Australia in 1974. And in the same year, the first Advertising major was launched at the Queensland University of Technology, with the University of Technology, Sydney, following 16 years later and most of the other universities within the next decade (Kerr, Waller and Patti, 2009).

Thirty years ago, Rust and Oliver (1994) proclaimed the “death of advertising”, predicting that by 2010, advertising courses would be replaced by “not advertising” courses teaching subjects like the “Design of Interactive Databases.” They reflected, “Never has advertising appeared so pale and lifeless. Advertising agencies are in a state of siege, as billings shrink, layoffs abound, and accounts are lost to nontraditional players.” The Wall Street Journal concurred, “The \$138 billion advertising industry seems unprepared for an interactive future” (Smith and King 1993).

And now, in 2024, it’s time to once again check our pulse. To see if Rust and Oliver were right. Or if the industry is still breathing. And our university courses are bringing new life and new ideas for future growth.

The purpose of this White Paper is to bring together the insight and experience of industry leaders and the research and rigor of academics to examine the current state, and imagine the future, of the advertising industry and the role of advertising education. Drawing from both secondary and primary research, it provides an important benchmark and develops a number of predictions for the industry and advertising education.

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## 1. THE ADVERTISING INDUSTRY

We begin with some numbers indicating whether there is still an advertising industry, and whether it is shrinking or growing in size. We show that advertising is increasingly being produced by people outside the traditional advertising industry. This suggests that advertising education will have a wider and more fundamental role in the future, educating consumers and information technology workers, as well as the increasingly smaller cohort headed for employment in advertising agencies.

### Revenue and Performance

The death of advertising has not yet happened in Australia, according to the latest expenditure figures. Dentsu's Global Advertising Forecast suggests expenditure on Advertising in Australia will reach \$19.7 billion in 2024 (Mumbrella 2024). This projected 1.8% growth is welcomed, yet significantly less than the projected 6% growth in the UK or 5.9% growth in the US.

In terms of revenue, Australia's annual advertising industry revenue reached \$3.6 billion in 2024. While it has dropped by 0.5% in the last 5 years, it is projected to increase by 1.4% in the next 5 years (IBISWorld 2024).

**Table1: Advertising Revenue 2011 – 2029**



Wages totalling \$1.8 billion, grew by 0.1% between 2019-2024, and are expected to increase a further 1.9% in the next 5 years (IBISWorld, 2024).

The largest agency group is WPP AUNZ, accounting for 7.9% of the industry, followed by Multi Market Services Australia 7.4%, Interpublic Group 4.0%, Dentsu Australia 3.0% and all other companies 77.8% (IBISWorld, 2024).

The majority of media investment is managed through major advertising holding groups with Omnicom Media Group (OMG) having the biggest media billings in Australia. According to 2023 RECMA agency rankings, GroupM and IPG Mediabrands were the next largest groups.

## **Industry Trends**

COVID19 was a catalyst in declining household consumption and marketing budgets, creating negative business confidence and a slump in demand from internet publishing. While revenue rebounded and advertising recovered, the market has changed. And consumers have changed, watching internet-based platforms and instigating a surge in digital advertising services at the expense of traditional print and broadcast advertising.

However, the differentiation of digital organizations is diminishing. Nine might not be categorized as digital, but increasingly their revenue is from digital products. Digital is everything. And it is global. The majority of Australian advertising dollars is going to companies like Google, Meta, TikTok, yet their contribution to the local workforce is small.

Equally, creativity has been disrupted by cost-effectiveness. There is a need to research, to prove performance and justify creation and production across a multitude of different platforms with a measure of effectiveness to prove advertising performance and guarantee a good results-based payment. Creativity at a good CPM.

In addition, agencies are seeking to add even more value to their clients. To achieve this, they are expanding services like through-the-line advertising, the acquisition of complementary businesses like public relations and specialist digital services, hiring workers with specialist skills and the integration of disciplinary expertise.

Current industry trends are summarised in the SWOT analysis in Table 2.

**Table 2: SWOT Analysis of Australian Advertising Industry**

<p><b>Strengths</b>  low capital requirements  low volatility  low imports  low customer class and concentration</p>	<p><b>Weaknesses</b>  high competition  low profit versus sector average  low and increasing barriers to entry  high product/service concentration  low and steady levels of assistance  low revenue per employee</p>
<p><b>Opportunities</b>  high revenue growth and demand from internet publishing and broadcasting</p>	<p><b>Threats</b>  low revenue growth projected for 2024-2029  low performance drivers and demand from broadcasting (except internet)</p>

Source: IBISWorld December 2023

### **Current Employment Numbers and Projections**

Over two thirds (67%) of Australian advertising expenditure was spent on internet advertising in 2023, up from just 1% in 2000 (Deloitte, 2023). By 2028, internet advertising is forecast to receive over 80% of total advertising expenditure, and television just 7% (Pash, 2023). This raises questions about whether internet companies are also major employers in the advertising industry.

In 2022, over 85,000 people were directly employed in advertising in Australia (Deloitte, 2023). Compared with the Australian population, advertising employees are more diverse. Nearly half (48%) have a non-Australian cultural or ethnic background, 62% are women (47% in management roles), 9.4% are LGBTQ+ (MFA 2023). But only 20% of these people are employed in internet companies, such as internet publishing and Web search companies. The rest are employed in professional services companies, mainly advertising agencies. Since most of the advertising managed by agencies will be internet advertising, advertising employees will need to be experts in this field.

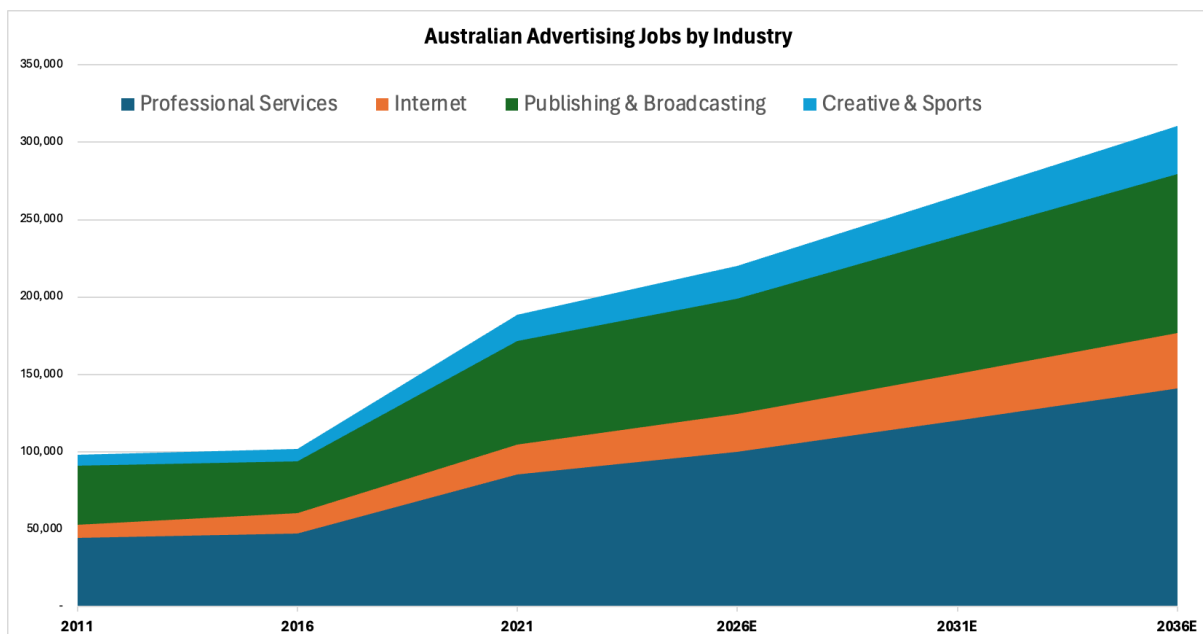
Vacancies in the advertising industry increased from 4.5% to 4.6% in 2024. However, the industry-wide redundancies translate this into fewer jobs available now than last year (IAB 2024). Over three-quarters of these vacancies target people with 1-5 years' experience. Generally, employers are seeking people with some experience, but lower salary expectations (IAB 2024). The IAB research suggests that, "Most companies are planning for AI to improve productivity without impacting current staffing levels".

Using Australian Census data to map growth since 2011, and project into the future to 2036, advertising employment from the Professional Services industries should continue to grow at an average of 28% per year (see Figure 1). The smaller Internet industries will continue to grow at a faster average rate of 34% per year, but will not

overtake the Professional Services industry as an advertising employer in the next 10 years.

The fastest growing industries for advertising employment are Creative and Sports, projected to grow at 39% per year, although they employ people in advertising only indirectly. The majority (80%) of those indirectly employed in advertising in 2021 worked in the publishing and broadcasting industries. With streaming services replacing traditional free-to-air broadcasting and print publishing, these industries are projected to continue to grow, but at the slower rate of 27% per year.

**Figure 1: Growth in Australian advertising jobs by industry since 2011**



Source: Developed for this research

To calculate the total directly employed in advertising from the Professional, Scientific and Technical Services (ProSTS) industries in Figure 1, we noted that Deloitte (2023) reported that 11,200 of the total 85,917 directly employed in advertising in 2022 were employed in the Information, Media and Telecommunications (IMT) industries, which meant 74,717 must have been employed in the ProSTS industries. This was 5.3% of the total employed in those industries in 2021 (1,397,467). In contrast, the 11,200 advertising employees from the IMT industries represented 37% of the total employed by those industries.

We also included indirect employees, again using numbers from the Deloitte (2023) report, which increased the percentage employed in advertising from IMT industries to 65%. We estimated that an average of 6.6% of employees in the creative and sports industries were indirectly employed in advertising. For the publishing and

broadcasting industries, we estimated this percentage to be 42%. For simplicity, we used these same advertising-employment percentages for 2011, 2016, and 2021, although these may have differed over time. For example, Deloitte (2023) reported that the percentage of creative industry employees employed in advertising doubled since 2016.

These percentages have implications for education courses beyond those typically involved in an advertising degree. If nearly half of students training for the broadcasting and publishing industries will be indirectly employed in advertising, and nearly 80% of advertising will be internet advertising, those students will also need to develop internet advertising expertise.

## 2. THE CURRENT STATE OF ADVERTISING EDUCATION

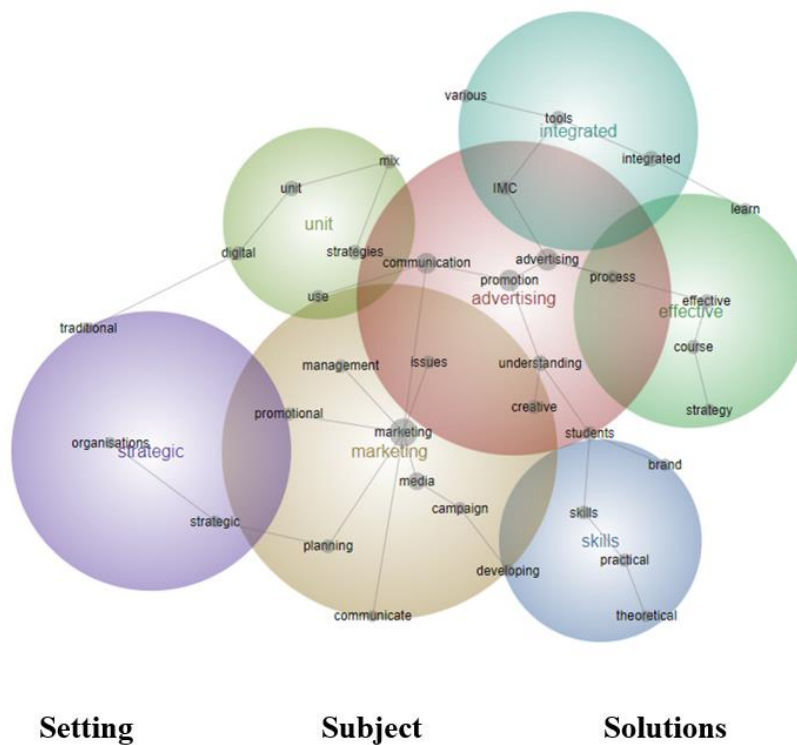
Advertising or Marketing Communications is taught as an individual subject at 41 of the 42 universities in Australia, with the *University of Divinity* being the only university that does not teach advertising.

Of these 41 universities, 15 offer undergraduate major programs in Advertising or Marketing Communications. Their offerings include subjects that are similar across all advertising programs: branding, media planning, copywriting/creativity, account management, campaign planning (these are the same traditional subjects Rust and Oliver predicted would vanish), plus digital marketing, internship/workplace learning, and legal/ethics subjects.

In a content analysis of the synopsis of these subjects, accessed through the university handbooks, 36 subject descriptors were identified and analysed using the text mining software, Leximancer. These 36 descriptors were grouped into seven themes describing the key functionalities of university advertising programs. These are: (1) strategic, (2) marketing, (3) advertising, (4) integrated, (5) skills, (6) effective, and (7) unit.

Figure 2 visualizes these themes into the setting, the subject and the solutions. It shows a direct connection between the *strategy* of the university and its evolution into *units* and areas of study like *marketing* and *advertising*. These require *skills* and *integration* to be *effective*.

**Figure 2: A Content Analysis of Advertising Education**



While analysing the offerings, a few points were noted:

- **Marketing Communications or Integrated Marketing Communications (IMC):** These terms were highlighted as the main way to describe what was being taught, although a few universities did continue with the title Advertising or even Promotions. The term 'digital' was included in some titles, reflecting the changing digital environment and media consumption behaviour of society.
- **Integrate Tools and Evaluation for a Successful Strategy:** Advertising courses acknowledged the importance of planning and integrating activities before evaluating the effectiveness.
- **Practical Skills:** In addition to the theoretical foundations, subjects identified practical skills to help equip students in developing and implementing advertising campaigns.
- **Branding and Creativity:** While typically included in Advertising/Marketing Communications majors, these could also be core subjects.
- **Ethical and Legal Considerations:** A few universities included subjects in this area. However, the importance of these topics underpin their value for understanding advertising in society and so are recommended as future subjects of study for Advertising education.



### **3. ADVERTISING IS NOT JUST ABOUT ADS. IT'S TIME TO UNLEARN.**

Looking beyond statistics and even conventional opinion, we seek ideas and insights about the changed role of advertising and its support through university education.

This primary research uses interviews to gain an in-depth understanding of what people think about advertising. It gathers insights from ten leading practitioners in the advertising industry, plus ten university students soon-to-complete their advertising degree. It delivers important insights about our industry and a chance to reimagine.

#### **Advertising has lost its USP**

Advertising has always been redefined and empowered by technology from the first printing press to television to the internet. But do people understand what advertising is anymore? Or what its unique selling proposition (USP) really is? In 2020, two academics sought to redefine advertising, using the Delphi method to find consensus amongst a global panel of advertising experts, including industry leaders and academics.

Their concern was that “In broadening advertising too far, it is possible some of advertising’s unique identifiers have been lost. This is especially problematic for government, the legal system and self-regulators, which must operationalize advertising as a bounded legal concept,” (Kerr and Richards 2020, 177).

The resulting definition of advertising devised by the expert panel builds on and extends previous definitions. It suggests, “Advertising is paid, owned and earned mediated communication, activated by an identifiable brand and intent on persuading the consumer to make some cognitive, affective or behavioural change, now or in the future”. But however well it is defined through research, it appears that both the industry and academia have concerns that no one knows what advertising is.

One industry leader said, “The industry has had brilliant characters and awesome talent, but it’s never really been seen as a professional services industry. Advertising has struggled a little bit in terms of recognition”.

Another added, “I think a lot of people want to make their mark on the world. And some of them see that through the power of brand marketing, influencer marketing, having your own channel, digital marketing. But I don’t think they are seeing all of that as advertising. When they think of advertising, they think of TV ads or outdoors ads or something like that.”

This perception was echoed by other industry leaders, “I don’t know if the link between a career in advertising and the stuff they do today is clear. So I’m on TikTok all day, but does that make you want a career in advertising?”.

“It’s fractured up and splintered out into creative direction or marketing or digital marketing or entrepreneurism. It is not as alluring or as cool as it once was.”

“Even though advertising itself has changed a lot, not a lot has evolved. The actual advertising model itself hasn't evolved. Not for Ad agencies. And then the generation coming through has different values and I wonder if somewhere in there is a bit of a disconnect.”

“That word advertising is applied to everything from sponsorship deals to activations and there are so many different ways of spending a client's budget. So I think as a career it's a little more confusing, because where will my degree lead me if there's no certain kind of pathway anymore.”

Our advertising students concurred. “A lot of the messaging I got was advertising is on the decline. Marketing is where the money's at. Advertising is really competitive, and the salaries are not as good.”

Yet another student commented, “I think people kind of equate marketing and advertising and social media influencing. As a lay person, they just put it in the one bucket, where these are the people that try and manipulate me into spending my money”.

Perhaps the definition of advertising has already broadened too far.

### **Paid, Owned and Earned Mediated Communicators with an Identifiable Brand**

Perhaps we have all become advertisers, without really knowing what advertising is. Or to reference the academic definition, we have become paid, owned and earned mediated communicators with an identifiable brand.

An advertising industry leader suggested, “You wouldn't call a lot of what we do advertising in the old definition, but then you'd almost call a lot of people advertisers too. What they're doing is really advertising themselves and their stories.”

An advertising CEO concurred, “We're living in a world of content creators. They've grown up being brands and they think they know how to do it.”

Another added, “It's not just channels that are digitised, consumers themselves have increasingly become channels to market themselves in social commerce.”

It was thought that social media was about personal branding and giving people autonomy to distribute content. And that “the consumer, that's the thing that evolves more than anything.” Even technology.

“Execution and channels have changed. But consumers are evolving faster than anything.”

Technology has made advertising more affordable, where “you can build an entire business for \$10 a month.”

“The cost of entry is massively reduced, so it opens up massively for people to get into it now. Whether it's filmmaking, whether it's storytelling, whether it's being an influencer. But I'm not necessarily sure that that equates to, “as a result of that, I am now interested in doing media and advertising”, and that that's potentially the missing link.”

### **The Missing Link**

The missing link is how to translate what people do everyday into a desirable career. To explain to them that posting on TikTok, conducting search, creating content and being an influencer is an inherent part of advertising.

In the past, popular culture has repeatedly brought advertising to life, to our attention and on to our job list. Advertising practitioners spoke about their earliest connections with the advertising industry, sitting in front of the TV, watching Mad Men or laughing with Gruen. And even before that, there was Bewitched.

“Programs like Gruen have made it interesting”.

“I think I came through as the last generation that still looked up to the Mad Men era”.

Interestingly, Australians working in the UK noted that advertising is more popular. “People know advertising and want to work in advertising. I think because the Brits are kind of used to advertising that rewards them for their time, something clever, something emotional. They look forward every year to November to watch the John Lewis ads, and it's embedded in culture.”

However, In Australia, there is no John Lewis and little to introduce and excite the public about a career in advertising. Further, the students interviewed noted that unlike science or even coding, “Advertising is not something that's covered in high school. I think it is definitely overlooked. I certainly didn't think much about it in my final year of school. I just sort of stumbled upon it.”

Another student agreed, “I think that advertising might need more advertising”.

### **Technology vs Creativity**

While technology has always shaped advertising, it has not previously sought to actually replace advertising practitioners at scale. In the past, technology provided new platforms and channels like printing, radio and TV. But now we wonder whether AI will drain the life out of advertising and commoditize design and production. Or equally, whether it will empower it with instant research, technical capabilities and cost savings.

One industry leader commented, “I feel like the technology of today or the hottest marketing buzzword is only going to get more and more aggressive and more frequent”.

“The influx of people coming into the industry is getting larger and larger from a technology point of view.”

An industry leader observed, “I guess the industry is around data and numbers and coding and so we could be possibly turning off those big thinkers. Digital advertising and marketing just seem a little bit more binary. You know, it's looking at results, it's not tickling the creative fantasy. We want to attract brightest mathematical brains while not turning off the creatives.”

Despite the technology transformation, it was felt that the fundamentals of advertising were both important and unchanging. “The fundamentals are still the same. The approach is still the same. Just the outputs look different.”

Another practitioner added, “If you can understand the fundamentals while keeping an eye on the things that move fast, then you're much better equipped”.

Maybe the new advertising is broader but equally creative. One industry leader suggested it was about “How to solve problems creatively. But that could be creating a new product. It could be reinventing a supply chain system. The value bit is in the idea, not the ad.”

And demonstrating that creativity can be employed in new ways, an industry person working in the UK noted, “ALDI pretty much only hires ex creative agency in their marketing team. And so they've got an absolute killer marketing team of brilliant ex agency people and it shows in the work”.

## **The TikTok University**

The struggle between technology and creativity in industry is equally reflected in the classroom. The remit of university education is to teach the fundamentals of the industry. But academic research uncovers change. Theories that are proven to no longer work. Research that discovers how things work or challenges us to explore how they could.

Technology has redefined the lecture and empowered students (aka Paid, Owned and Earned Mediated Communicators with an Identifiable Brand) with choice. They can come to class, grow their social networks and have a beer with their mates. Or students can opt to zoom into that same class and interact with other online students or in the classroom, and still meet their job requirements. Or they can just watch it all on catch-up.

Based on their adoration of TikTok, students expect the learning content to be short, up-to-the-minute and engaging. So the creativity is still important to demand the attention and learning of students and create an enjoyable experience.

Students reported that they often enrolled in advertising as a means to “advance their creativity”. It was creativity with a salary. “I kind of felt the pressure from my parents. I don't want to be a starving artist. I want to be creative. But I also want to have a job and make some money.”

Just like advertising, combining technology and creativity in a university program delivers the optimum outcome. An industry person added, “Once you know someone has done that degree, you know that their base knowledge of the principles of advertising are sound”.

But perhaps more importantly, an advertising degree, “provides evidence that you like to learn, you're willing to learn and you're willing to take on new ideas. That's what I want in someone I'm going to hire.”

And for university students and potential industry employers, it is about the technology, creative and disciplinary transformation. A student noted, “I knew what advertising was, but (until I studied at university) I didn't really know what it could be”.

#### **4. PREDICTIONS FOR THE ADVERTISING INDUSTRY AND UNIVERSITY EDUCATION**

What does the research mean for the industry and advertising education? To interpret the findings, we gathered a think tank of industry people and academics. Having read and digested the document, they sought meaning by brainstorming the findings.

##### **Advertising is Creativity Across the Organization**

What once was the International Advertising Festival, when it launched in Venice in 1954, has become the Cannes Festival of Creativity. Its focus has extended beyond advertising to include programs of learning in the 1990s, Promotion and Activation in 2006, Public Relations in 2009 and Cannes Health in 2012. And in 2024, the festival became a consultant, offering “a comprehensive suite of advisory, learning, and intelligence services”. And an educator, launching its first global LIONS Creative MBA in 2024.

The award festival has expanded beyond advertising, with a focus on creativity and performance. And in this way, it seems to set a good precedent for the advertising industry itself. Advertising also needs to expand its brand beyond advertising.

Always driven by technology since the printing press was invented and the TV turned up the volume, advertising is powered by technology. This technology, even more impactful with AI possibilities and cost savings, is changing the way we research, the way we create and produce content, the delivery platforms and performance measurement.

This technology could delegate advertising to a tactical and executional role. But we believe it will expand its value and performance into marketing and across the organization.

People may forget the name advertising and just call it marketing. Or marketing communications. But advertising influence will permeate as opposed to shrink. Adding the strategy and creativity of advertising into everything an organization does and every consumer touchpoint. Advertising is creativity across the organization.

### **Advertising adds Creativity to each Consumer Touchpoint**

Advertising is also creativity across the entire customer experience. Not just the awareness or purchase stage, but every point of the customer journey. Every brand interaction. From the scripts you give to frontline staff for talking to customers. Or how consumers interface with the actual design and the packaging. The holistic customer experience, where customer touch points become even more important than what the 60 second TV ad used to be.

By taking a whole of experience approach, it may be that advertising can strengthen all areas of the customer journey. Adding creativity to each touchpoint and perhaps creating new ones in a more engaging journey. And in doing so, advertising may uncover more sophisticated or cheaper ways to interact, rather than having to buy media.

New techniques and tactics and ways of operating. But the end game is still delivering the brand message to an audience in a more proactive way at every point in the journey. And ethically trained advertisers and designers will resist using dark patterns to exploit consumers.

### **Advertising is Democratized and Monetized**

Advertising has democratized brand influence. You don't have to be a famous actor or a celebrity to be an influencer. You just have to use TikTok. Anyone can be a content creator. And if you are good, you get noticed and monetized.

This sparks a new relationship between consumers and brands. Where once you would build your brand and then find an audience. Now you build an audience, quote statistics about the number of followers, and then choose a brand to advertise.

Take MrBeast. He builds 240 million followers and then adds MrBeast Burgers and MrBeast chocolate bars and a whole MrBeast Merchandise store.

This shrinks the connection of advertising to commerce to business growth. People will jump into new opportunities more quickly and brands will come and go a lot quicker because of that shorter journey.

The democratization of advertising offers a new way of building influence and monetizing audience. A new, more direct brand relationship. Where anyone can be an advertiser and be paid for doing it. However, those who have experience at creating compelling content in advertising courses will have an advantage in this new advertising economy.

### **Advertising Regulates Itself and What's Technically Possible**

Advertising will be increasingly regulated as an industry, as we admit its power. This is an artefact of the tension between regulation ethics and what's technically possible. And who makes that call? Consumers, regulators, brands? Who decides what's right? And how do people creating paid content on social media even know they're advertising?

Historically, Australia has always been a leader in self-regulation. But now we are witnessing the coming together of word-of-mouth and advertising and meeting somewhere in the middle. This is further evidence of the broadening of advertising in practice and in meaning. And the need to protect both the consumers and the advertising industry.

While we don't want to overregulate, we need to protect people who don't know that they're being influenced or even misled. Perhaps the best way to protect consumers' welfare, and the industry from over-regulation, is to educate consumers and practitioners about ethics and advertising. This needs to be a key component of advertising courses as employers are looking for people with this expertise to navigate issues of data privacy and brand safety.

## 5. SUMMARY AND CONCLUSIONS

Advertising has lost its USP. No one knows what advertising is any more. Yet increasingly, they spend their days doing advertising-like tasks.

So do we tell them? Or do we let them keep on doing whatever they're doing and change what advertising is called? Do we reimagine advertising based on technology, creativity and changing consumer habits?

As one advertising leader summed up, "I reckon advertising is the wrong word. The whole of the business needs to understand what a brand is and apply creativity to the entire business. You're going to have to unlearn. It is not just about the ads."

Or: "Advertising is dead. Long live advertising."

*We hope that this White Paper has raised some issues and added to the discourse related to the current state of advertising and advertising education. You can download further copies from our 50 Years of Advertising Education website <https://www.qut.edu.au/about/faculty-of-business-and-law/school-of-advertising-marketing-and-public-relations/50-years-of-advertising-education>*

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