

ANGLO MARKET INTELLIGENCE  
JAN – DEC 2020

FEB 2021



# STANDARD MEDIA INDEX OVERVIEW



Global give-to-get model with major holding companies and media agencies. Started in Australia in '09. NYC HQ since '11.



Clean and harmonize client level data for faster and better reporting as well as aggregated data for other agencies.



Produce category, spend and cost level insights which then becomes SMI data products. Clients include publishers, finance, consulting, brands and tech.

# ANGLO MARKETS REVIEW

## MARKETS COVERED

(% COVERAGE – NATIONAL BRAND AD SPEND)



USA  
(84%)



UK  
(60%)



AUS  
(93%)



CAN  
(94%)



NZ  
(99%)

## MEDIA COVERED



TV



Radio



Magazines



Newspapers



Outdoor

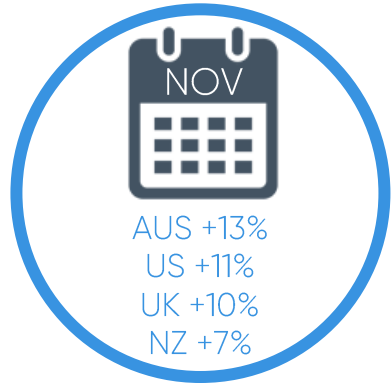


Cinema



Digital

# EXECUTIVE SUMMARY



## November Push Across Markets

November was the strongest growth month in three of five Anglo markets. November reached critical mass as marketers sought share of wallet during holiday.



## Digital Becomes Top Channel

Digital outspent TV by +9% in calendar year 2020, inverting last year's trend. Marketers are responding to shifting consumer habits, especially in Canada where digital's majority share is expanding.



## US Sustains Monthly Growth

Since August, the US has seen ad dollar lift which further accelerated in November and December. Accordingly, Q4 jumped from 29% to 33% of annual investment for this largest Anglo market.



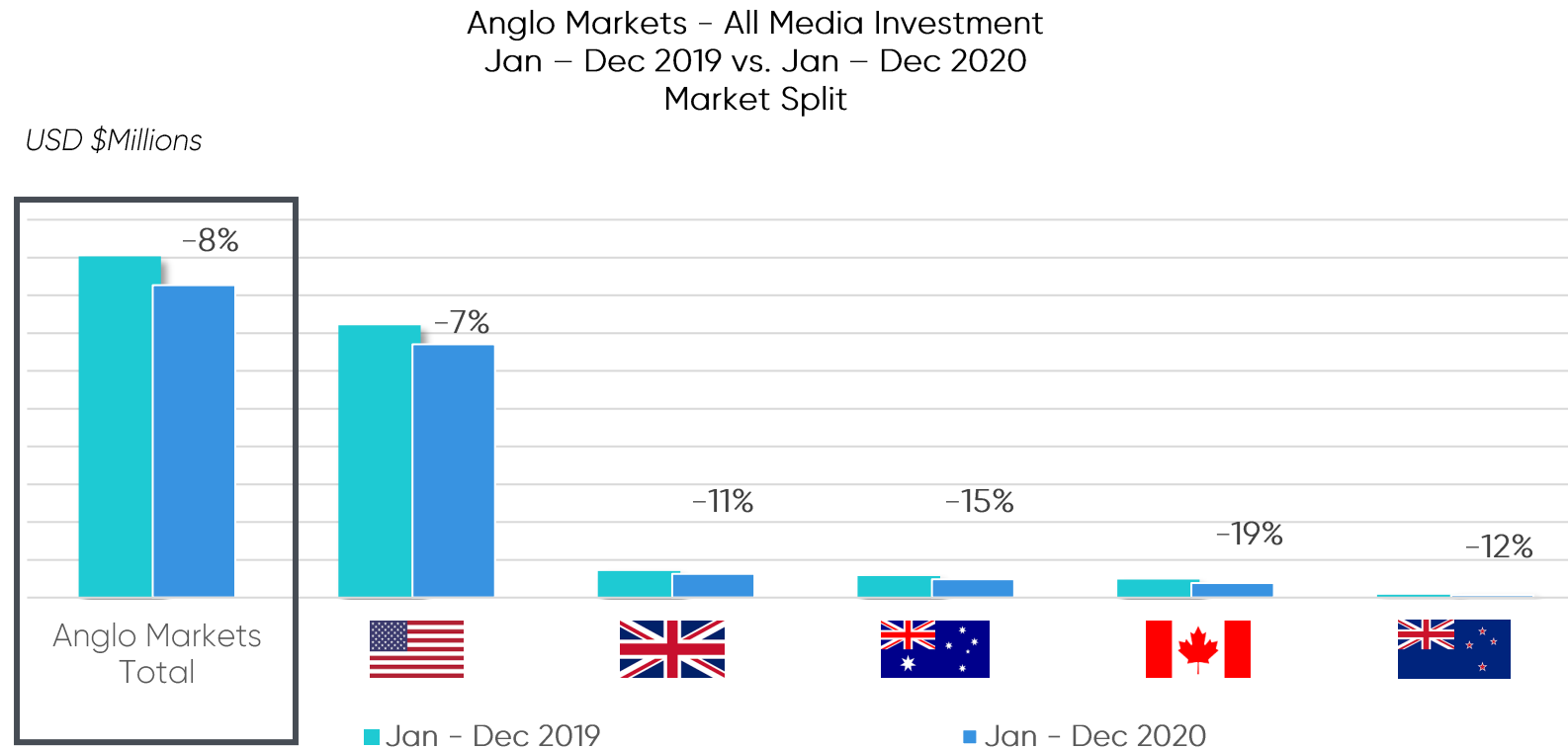
## Challenged Sectors Bounce Back

Trending down since the pandemic began, Restaurants were newly up across the board in Q4, while Auto steered back to growth in US & UK & NZ markets alike.

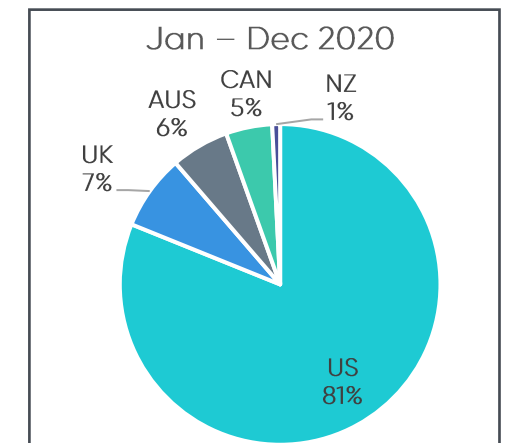
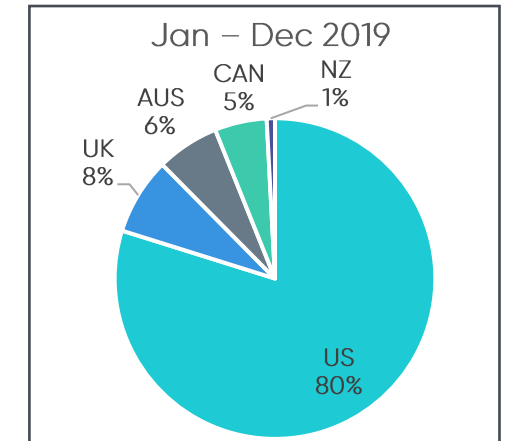
# ANGLO MARKETS OVERVIEW

JAN 2020 – DEC 2020

# WITH A -7% YOY AD SPEND DECLINE, THE US IS THE ONLY MARKET TO EXPAND ITS SHARE POSITION & UNDERPACE THE COLLECTIVE -8% ANGLO MARKET

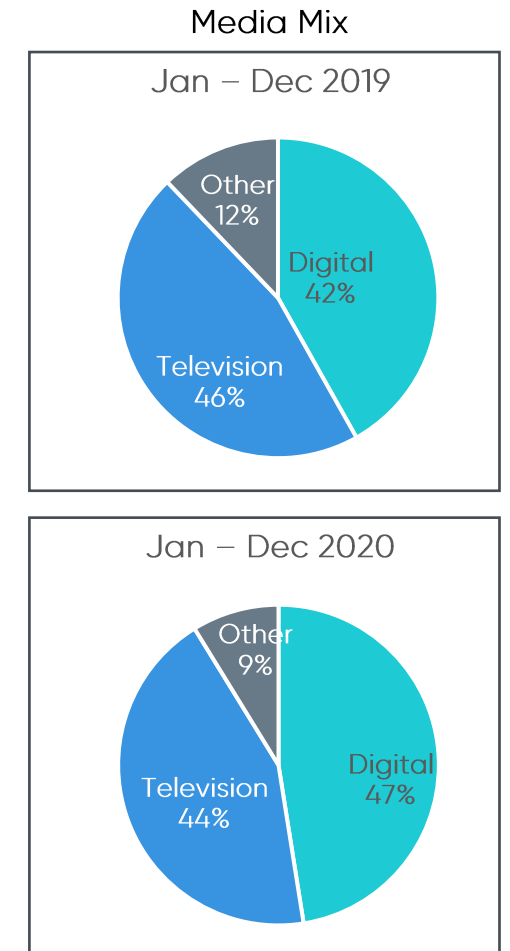
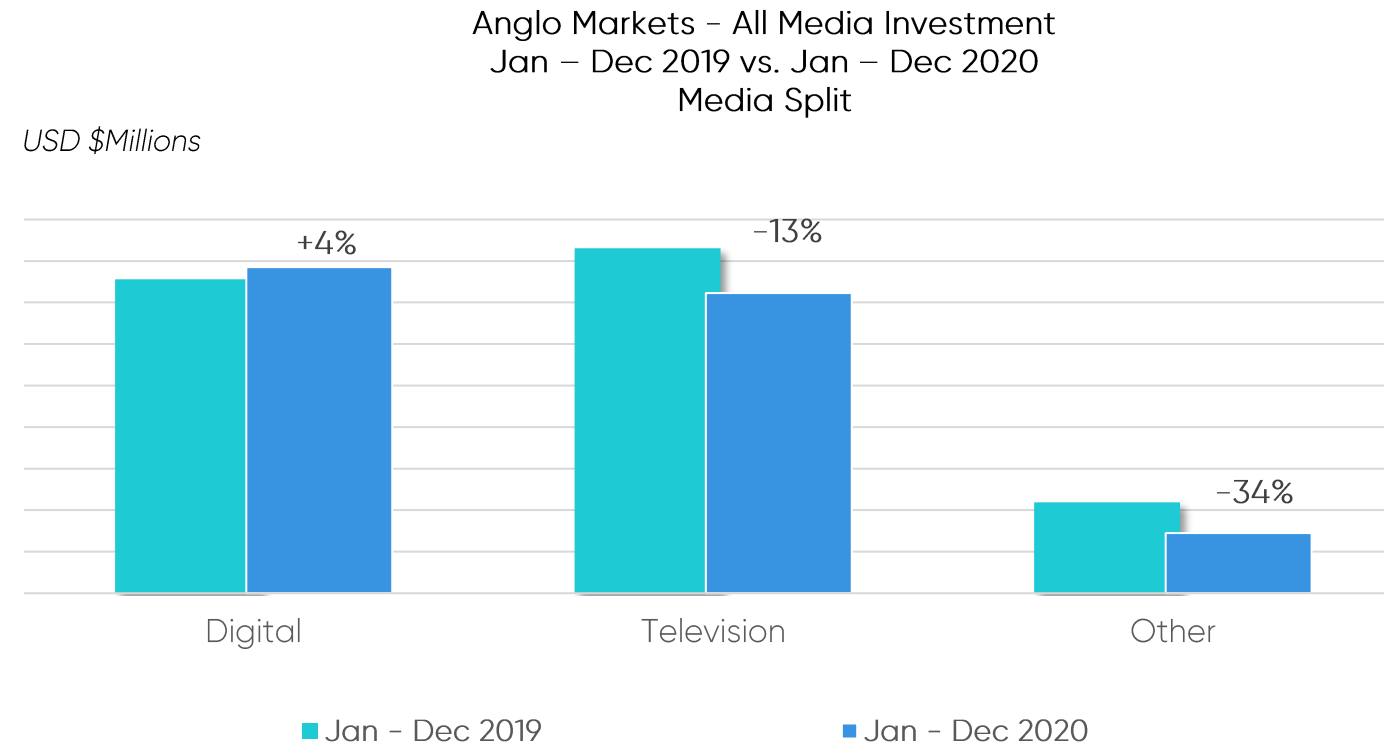


Share of Investment by Market



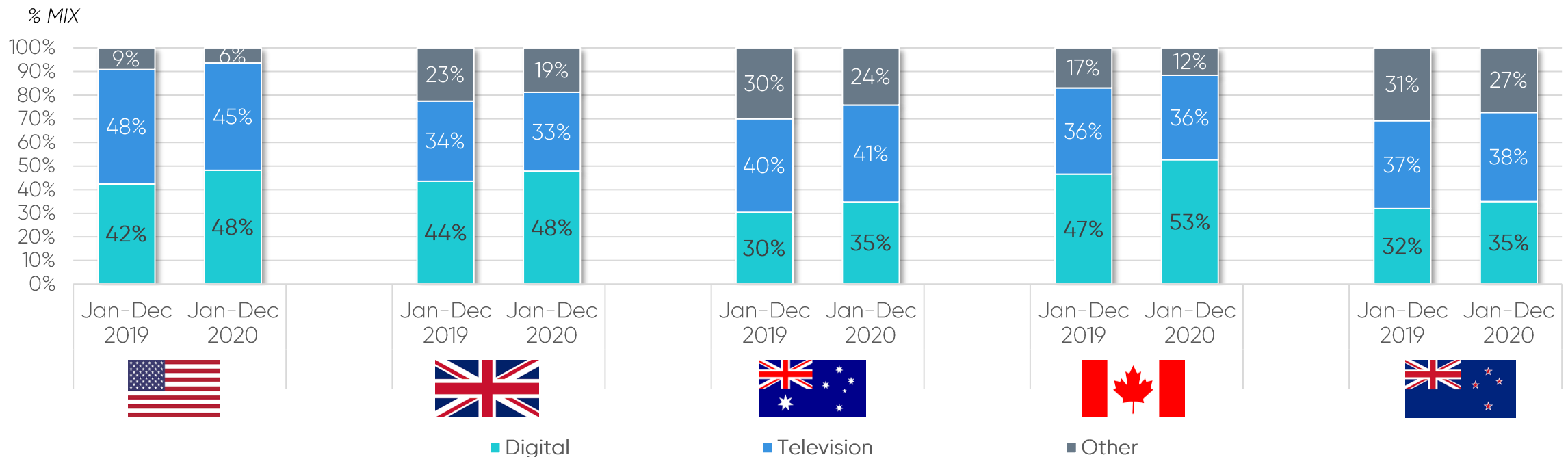


# DIGITAL UNSEATS TV TO BECOME THE LEADER IN JAN – DEC 2020, EXPANDING FROM 42% TO 47% OF ANGLO MARKET INVESTMENT



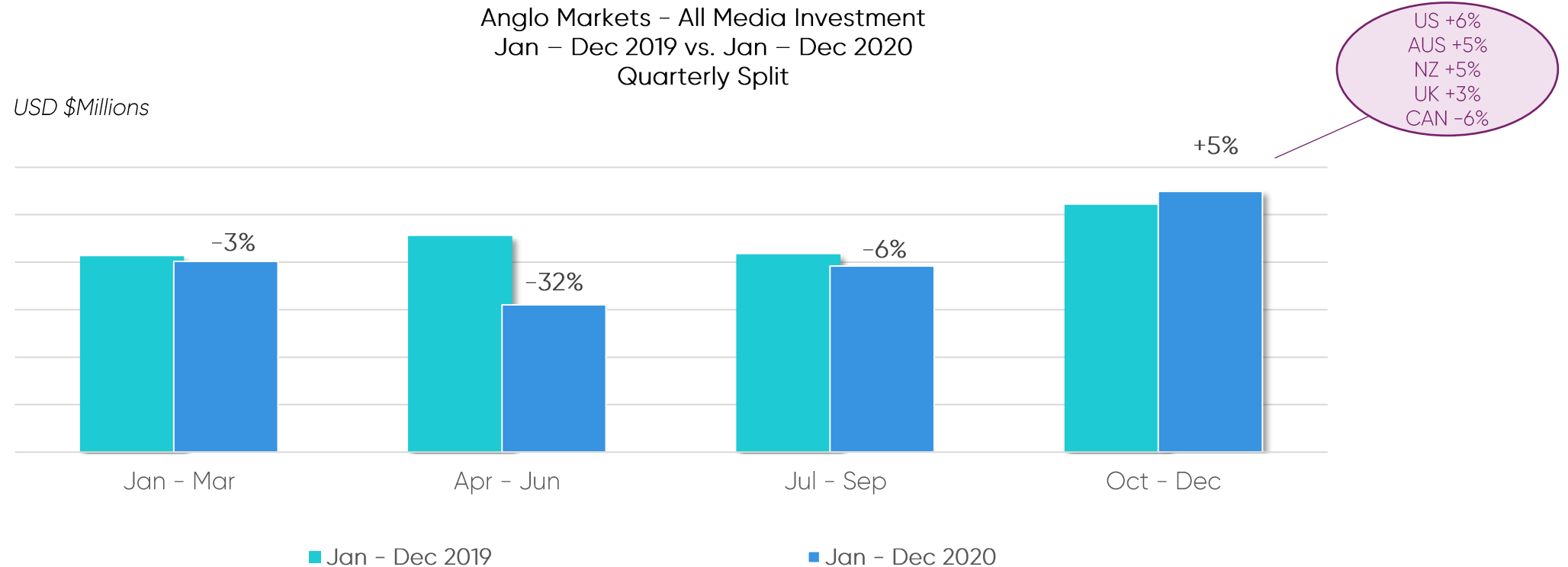
# US & CANADA EXPERIENCED THE MOST PRONOUNCED UPWARD MOVEMENT IN DIGITAL ALLOCATION AT +6 PTS YOY, WHILE NZ SAW THE LEAST AT +3 PTS

Anglo Markets – Media Mix  
Jan – Dec 2019 vs. Jan – Dec 2020  
Market Split

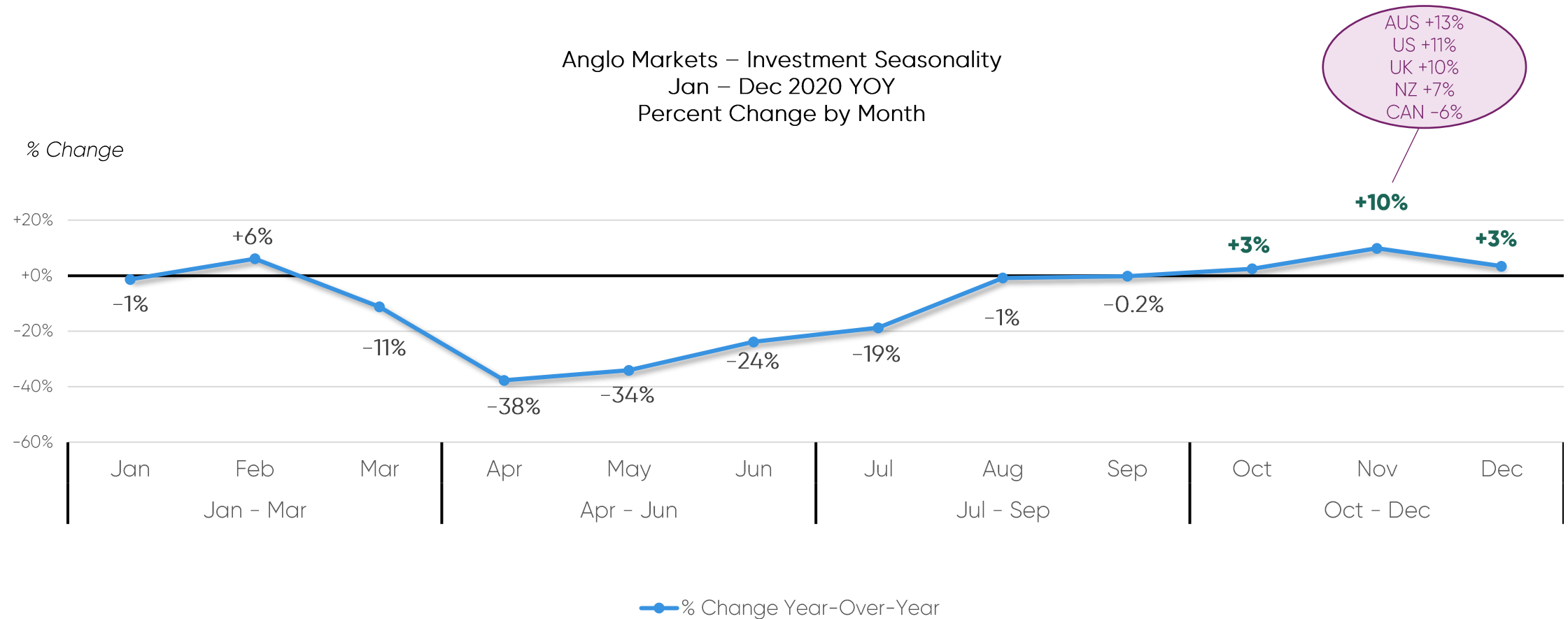




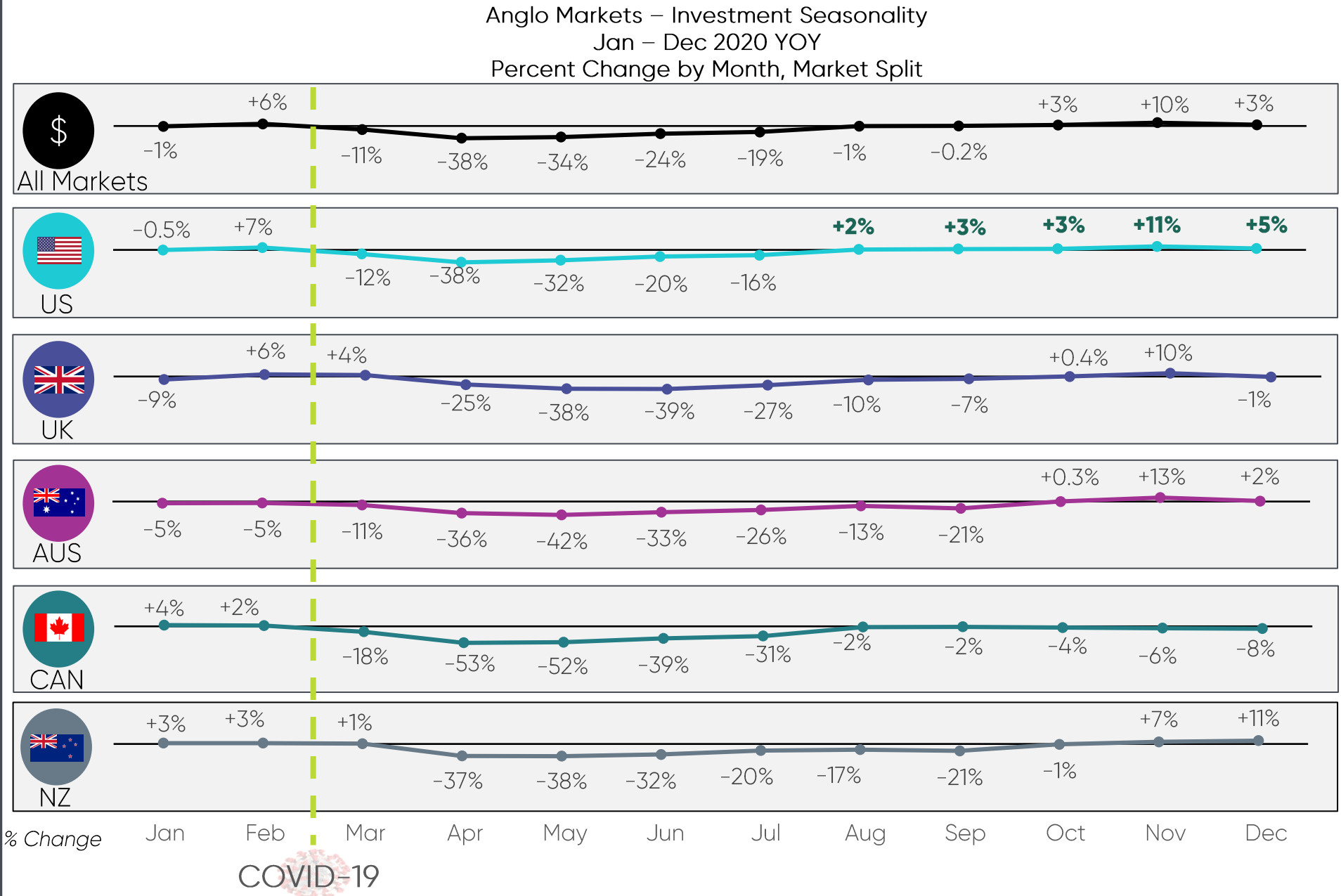
# Q4 REPRESENTED THE ONLY AD REVENUE GROWTH QUARTER WITH +5% LIFT, WITH ALL ANGLO MARKETS ON THE RISE EXCEPT FOR CANADA



# Q4 MAINTAINED GROWTH IN EVERY MONTH – NOVEMBER WAS A POWERFUL FORCE WITH ALL ANGLO MARKETS EXCEPT CANADA RAISING INVESTMENT

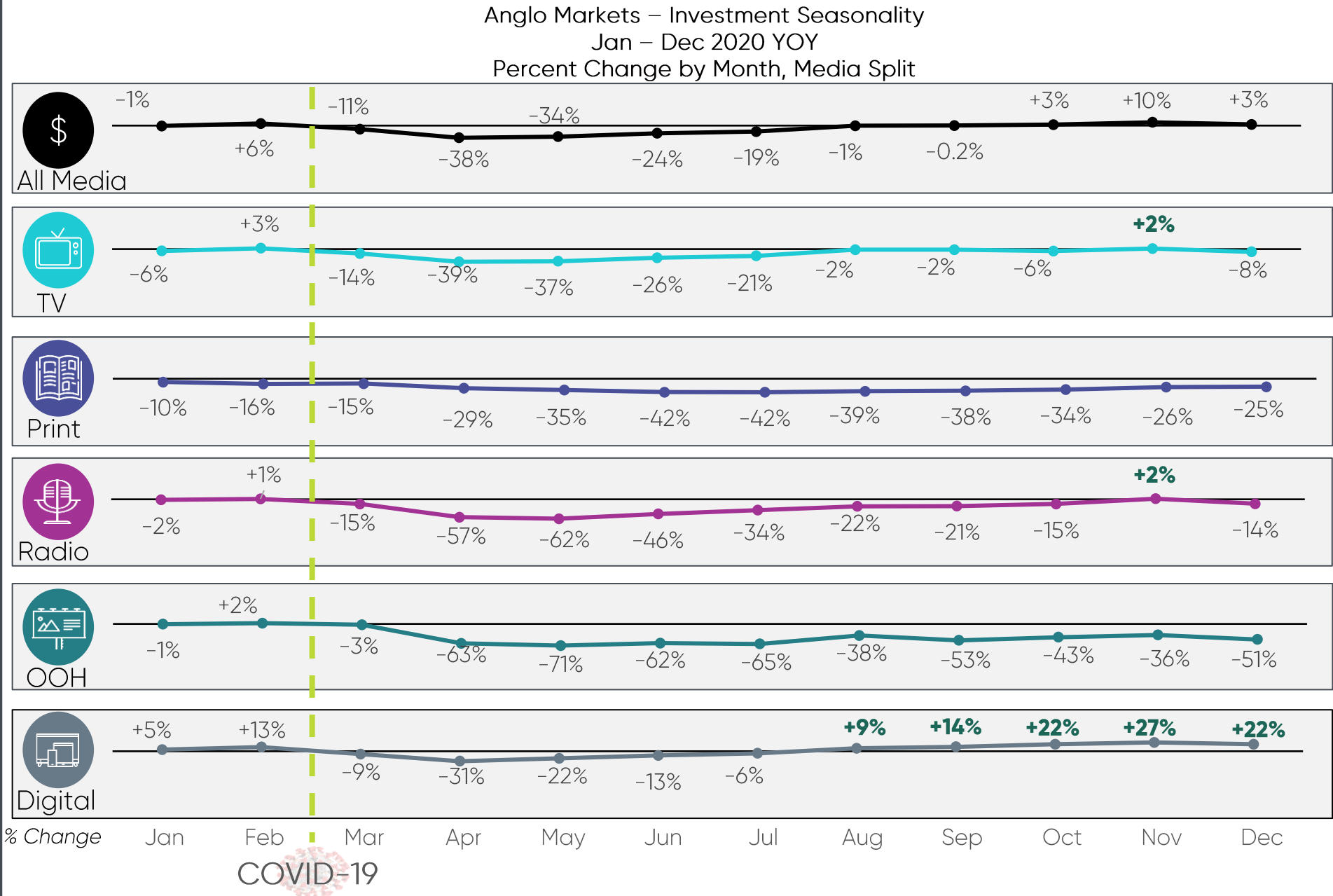


WITH FIVE  
CONSECUTIVE  
MONTHS OF  
GROWTH, THE  
US SHOWS  
IMPROVED  
RECOVERY VS  
THE OTHER  
ANGLO  
MARKETS



DIGITAL HAS REMAINED POSITIVE SINCE AUGUST, AND HAS FURTHER ACCELERATED INTO Q4 MONTHS TO DRIVE MARKET RECOVERY

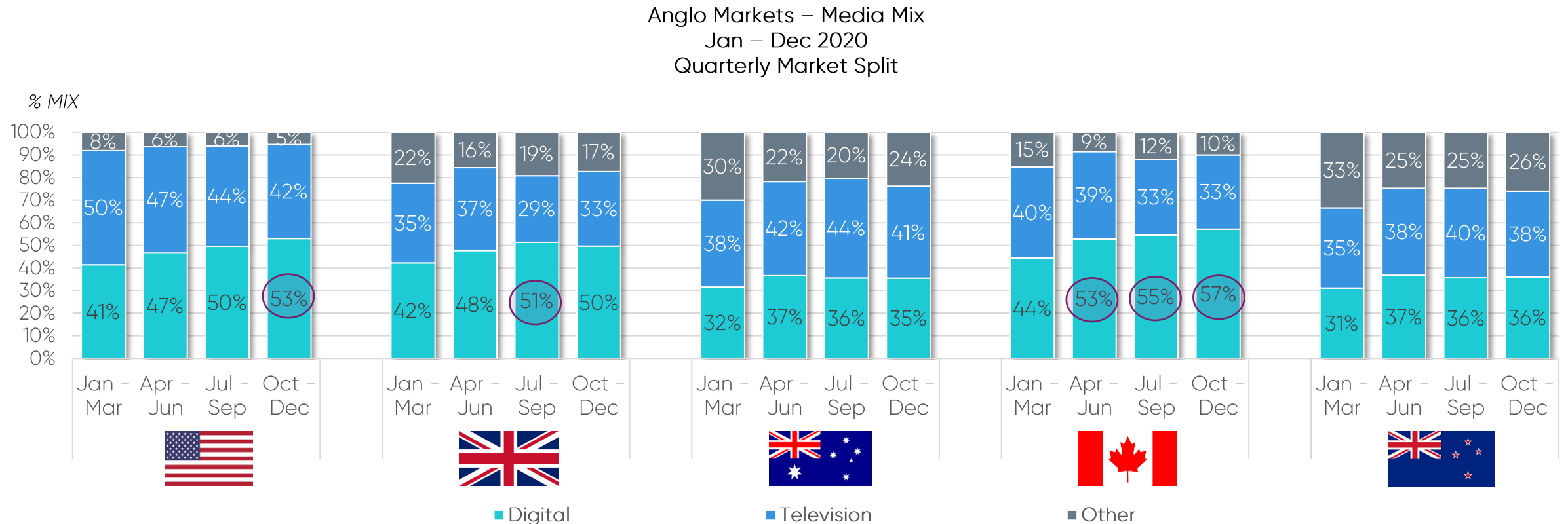
IN NOV, TV (US / AUS DRIVEN) & RADIO (UK DRIVEN) NOTABLY TURNED POSITIVE FOR THE FIRST TIME SINCE FEB – BUT RECEDED IN DEC



Source: SMI Pool | Markets include USA, UK, Canada, Australia, New Zealand  
Media formats include TV, Magazines, Newspapers, OOH/Cinema, Radio, and Digital  
SMI Client Report | Cannot be Distributed Without SMI's Consent

\* Not showing Other media (e.g. direct mail)

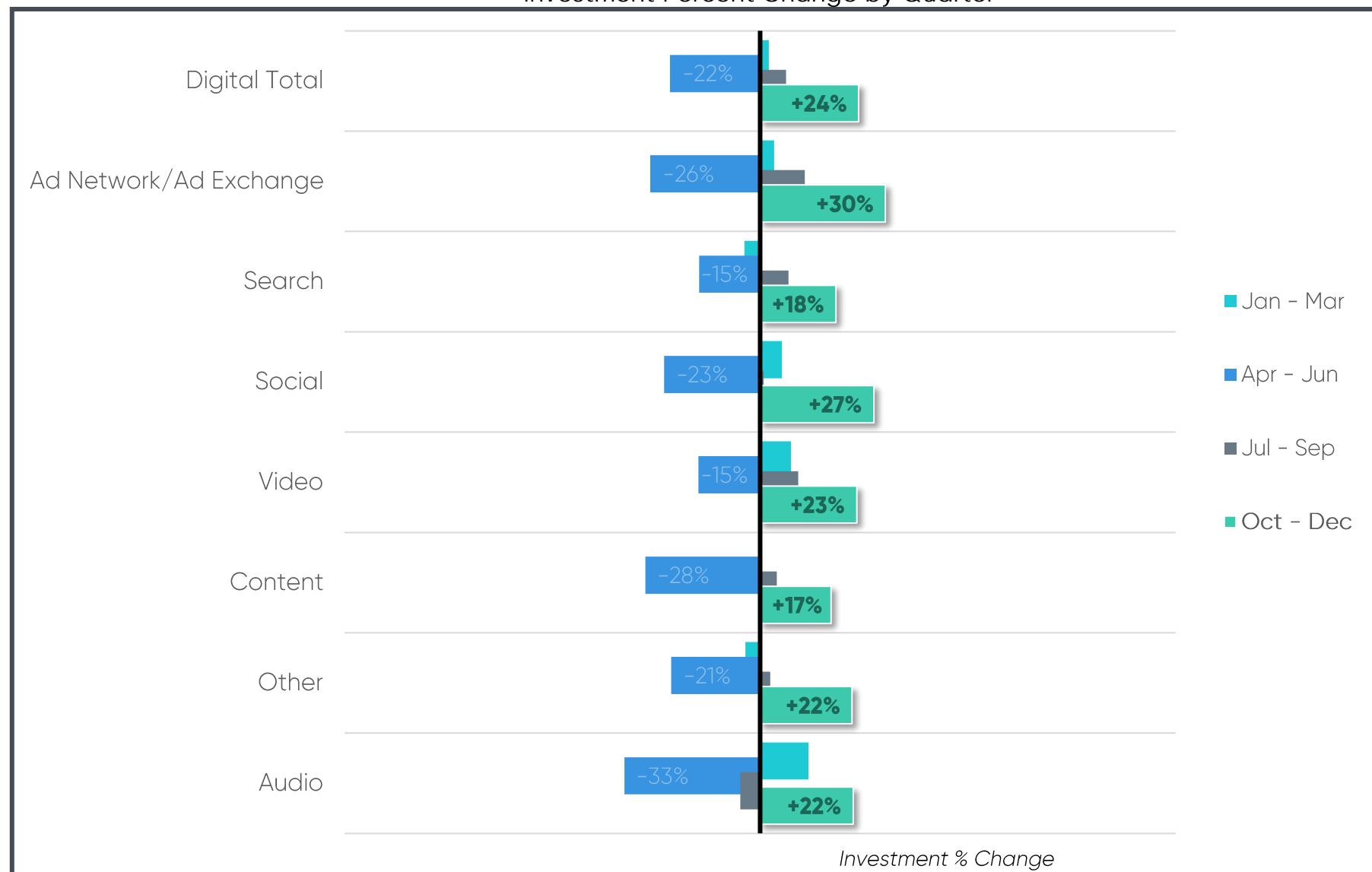
# DIGITAL HAS OVERTAKEN TRADITIONAL IN CANADA SINCE Q2, AND TIPPED THE SCALE IN THE UK DURING Q3 & IN THE US DURING Q4



QUARTERLY  
DIGITAL GROWTH  
PEAKS IN Q4 AT  
+24%,  
CONTRASTING  
THE SIMILAR RATE  
OF DECLINE  
OBSERVED IN Q2

DOUBLE-DIGIT  
GROWTH  
SPANNED EVERY  
SUBTYPE IN Q4,  
LED BY NETWORK  
/ EXCHANGE  
(+30%) AND  
SOCIAL (+27%)

Anglo Markets – Digital Media Subtypes  
Jan – Dec 2020 YOY  
Investment Percent Change by Quarter



+27%  
AVERAGE  
VIDEO  
GROWTH  
PREVAILED IN  
Q4 ACROSS  
THE UK, US,  
AND AUS

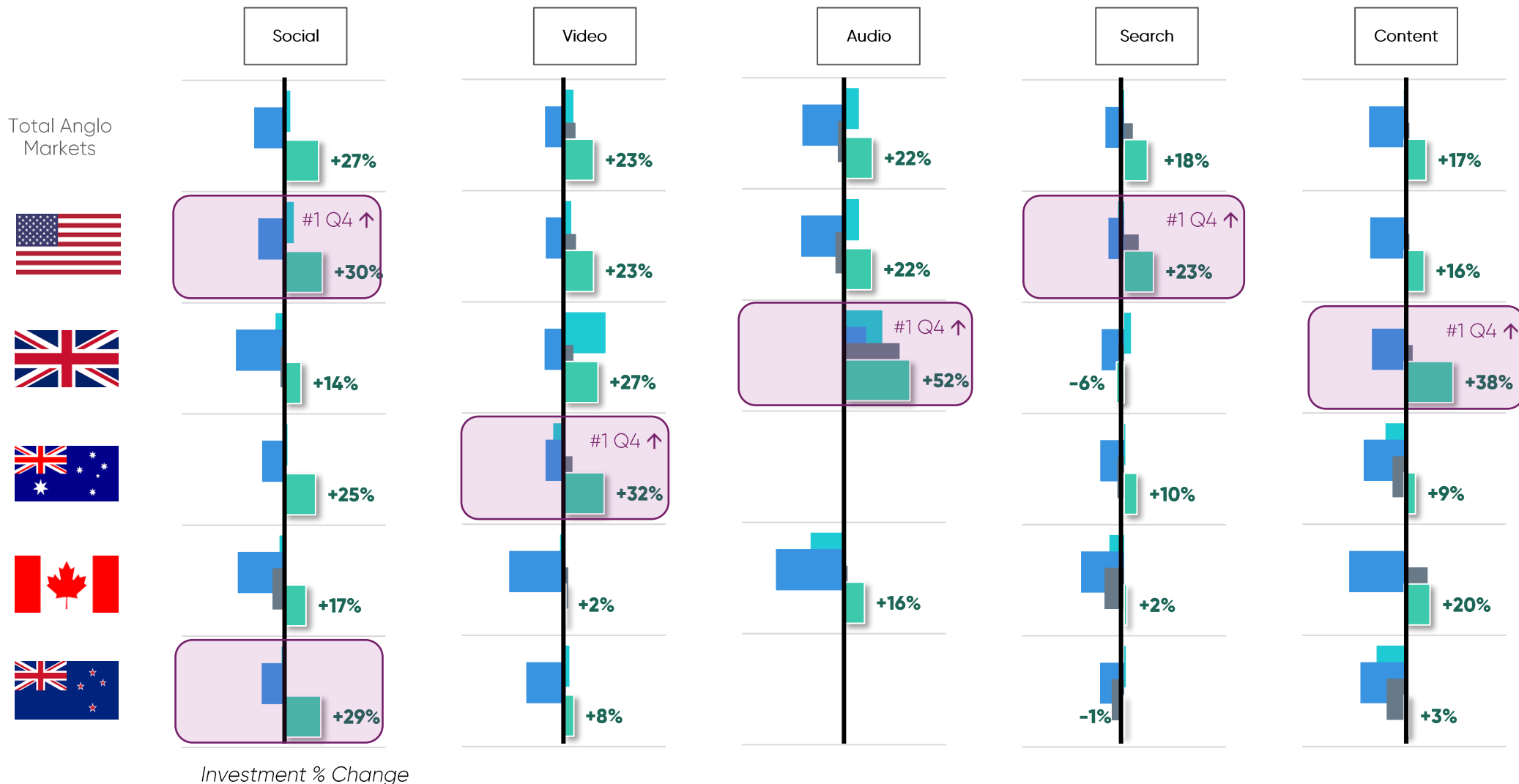
UK DIGITAL  
AUDIO IS  
PANDEMIC-  
PROOF WITH  
GROWTH IN  
EVERY  
QUARTER

# Anglo Markets Breakout – Digital Media Subtypes

## Jan – Dec 2020 YOY

### Investment Percent Change by Quarter

■ Jan – Mar ■ Apr – Jun ■ Jul – Sep ■ Oct – Dec



Investment % Change

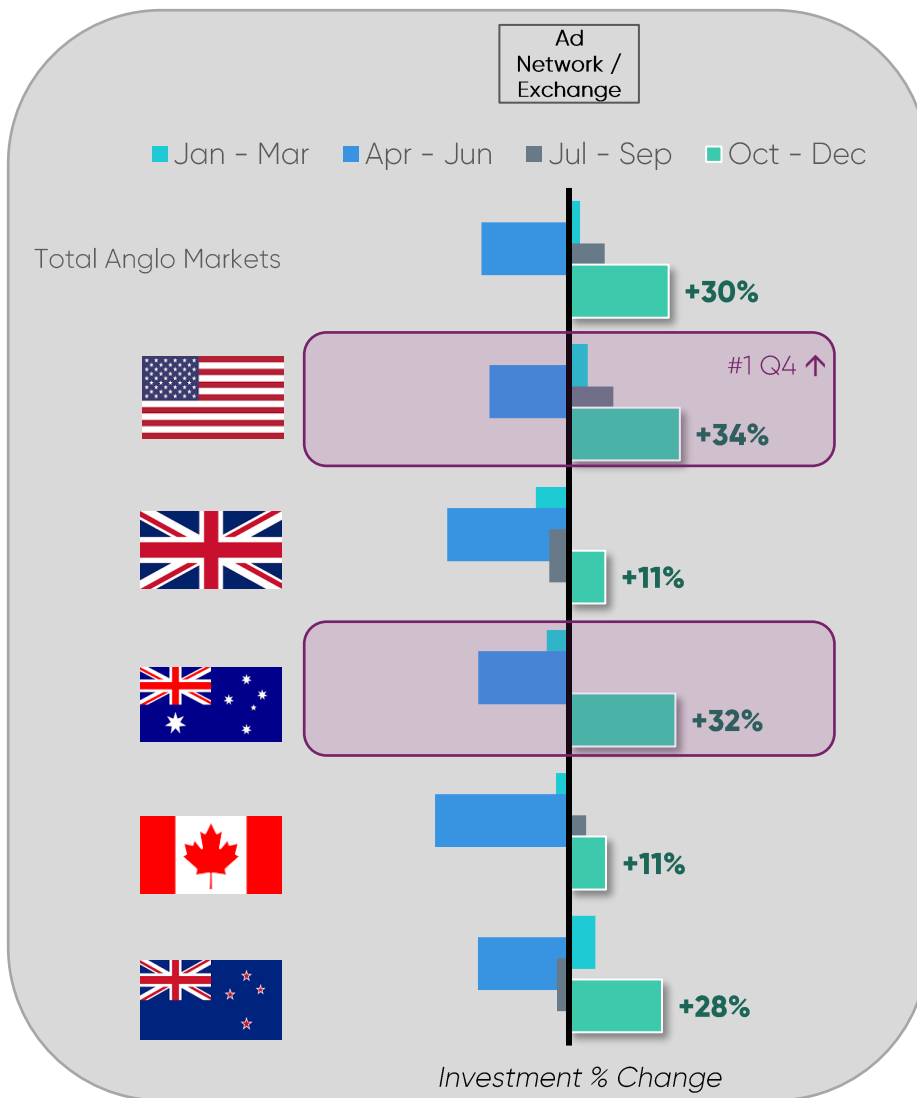


ANGLO MARKETS ARE RELYING ON PROGRAMMATIC MORE HEAVILY AFTER COVID-19, WITH ACCELERATION PEAKING IN Q4

US & AUS MARKETS REFLECT SIMILAR PROGRAMMATIC Q4 UPTICK, WITH NZ NOT FAR BEHIND

THE TRADE DESK OUTPACED AGENCY DESKS AND GOOGLE WITH +42% ANNUAL GROWTH

# Anglo Markets Breakout – Digital Ad Network / Exchange Jan – Dec 2020 YOY Investment Percent Change by Quarter



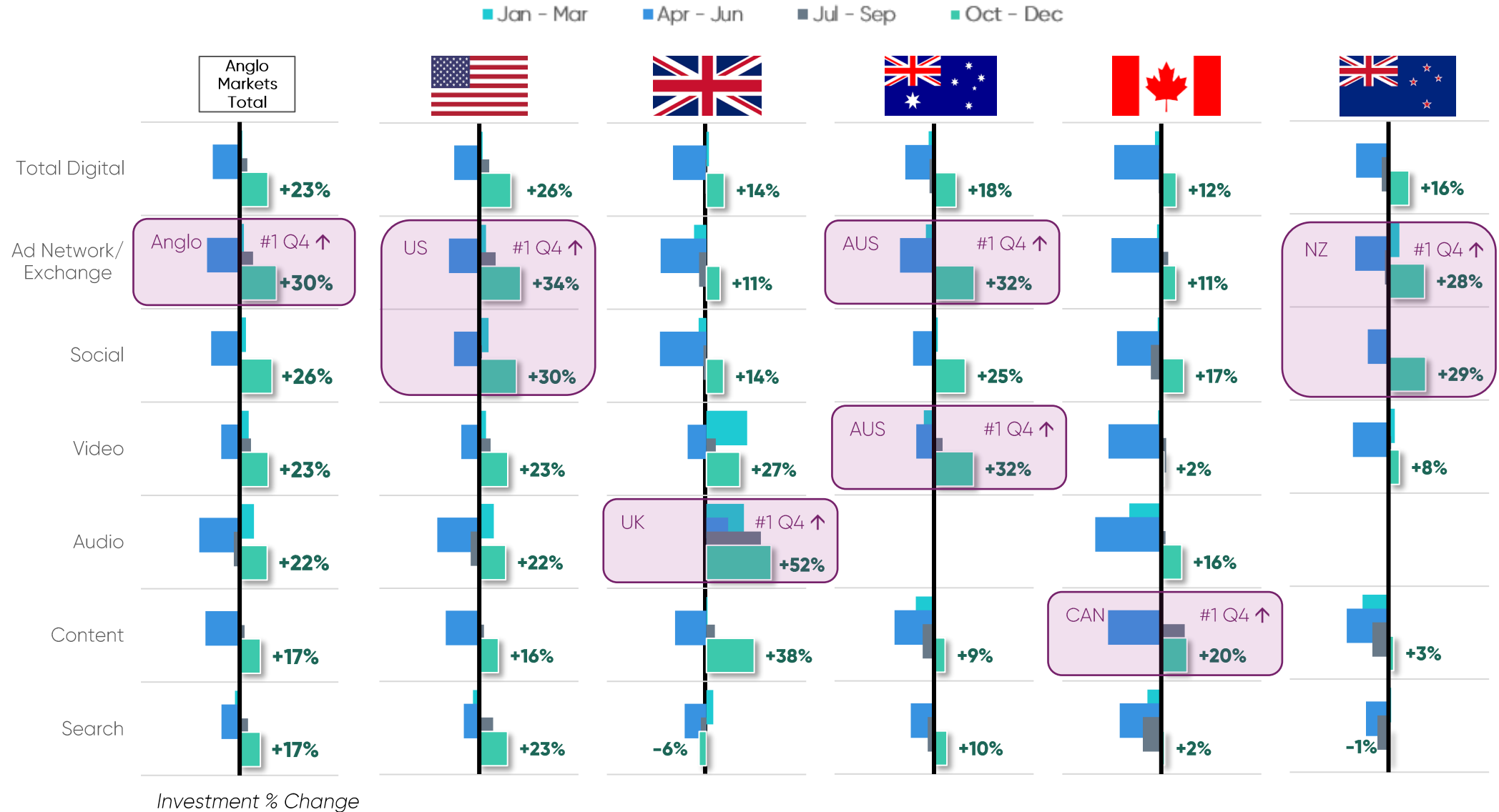
## Anglo Markets Breakout – Digital Ad Network / Exchange Jan – Dec 2020 YOY Annual Investment Percent Change

Top 3 Programmatic Master Owners*	TOTAL ANGLOS	US	UK	AUS	CAN	NZ
Agency Trading Desk	-7%					
Google, Inc.	+22%					
The Trade Desk	+42%					

AD NETWORK  
& SOCIAL  
WERE Q4  
DIGITAL  
GROWTH  
LEADERS IN  
THE US & NZ

NOTABLY,  
THE US WAS  
THE ONLY  
MARKET WITH  
DOUBLE-  
DIGIT LIFT  
ACROSS ALL  
DIGITAL  
SUBTYPES IN  
Q4

# Anglo Markets Breakout – Digital Media Subtypes Jan – Dec 2020 YOY Investment Percent Change by Quarter



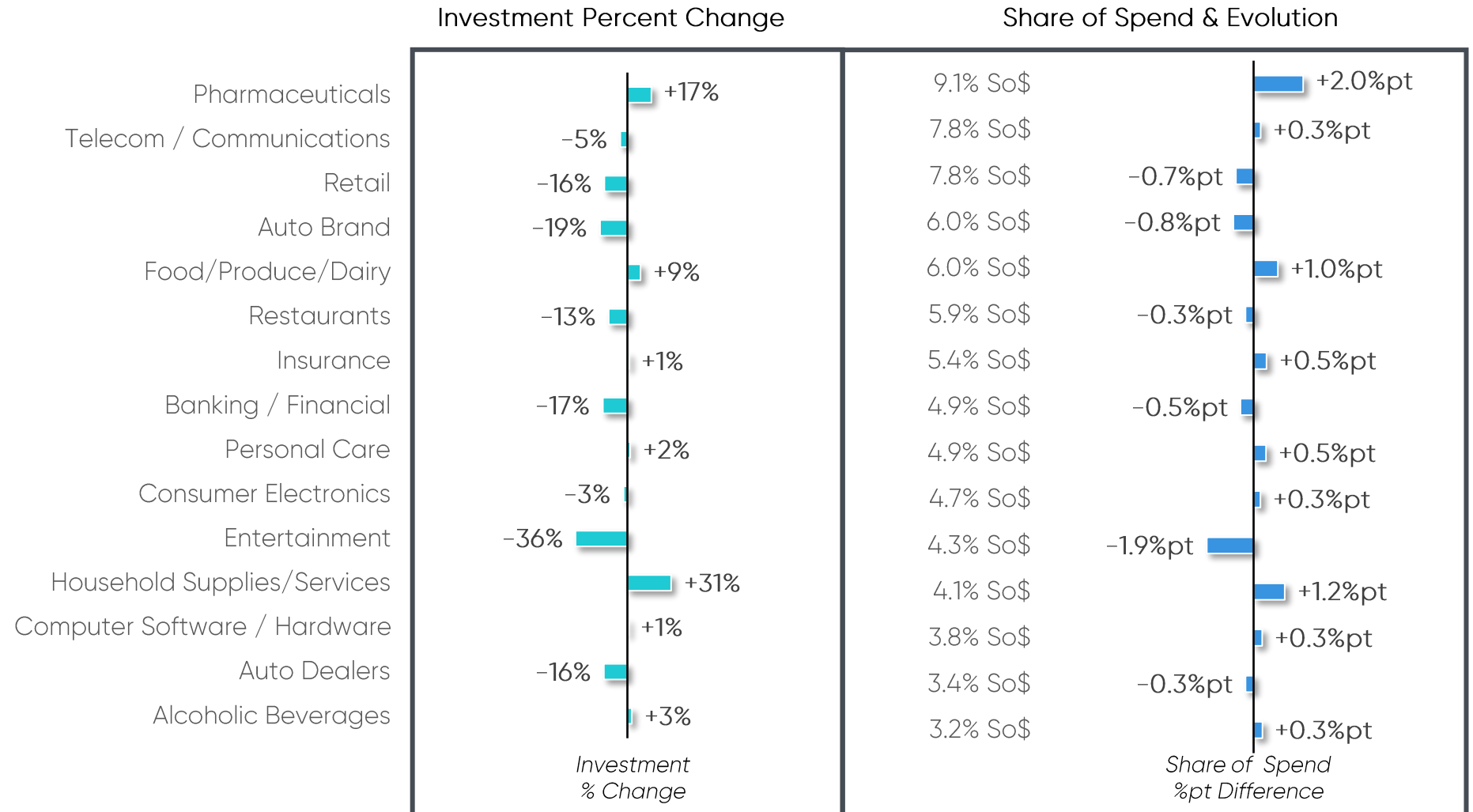
PHARMACEUTICALS  
(OTC + RX DRUGS)  
SHIFTS TO THE TOP  
CATEGORY RANK IN  
2020, MOVING UP  
FROM #3 LAST YEAR

FOOD/PRODUCE/  
DAIRY ALSO PUSHES  
INTO THE TOP 5  
ANCHOR POSITION VS  
#8 LAST YEAR

CONVERSELY,  
ENTERTAINMENT  
STRUGGLED AND SLID  
OUT OF THE TOP 10  
FROM #6 TO #11 YOY

WHILE PHARMA  
GAINED THE MOST  
SHARE (+2 PTS),  
ENTERTAINMENT &  
TRAVEL LOST THE  
SAME GROUND

## Anglo Markets – Top 15 Categories Jan – Dec 2020 YOY

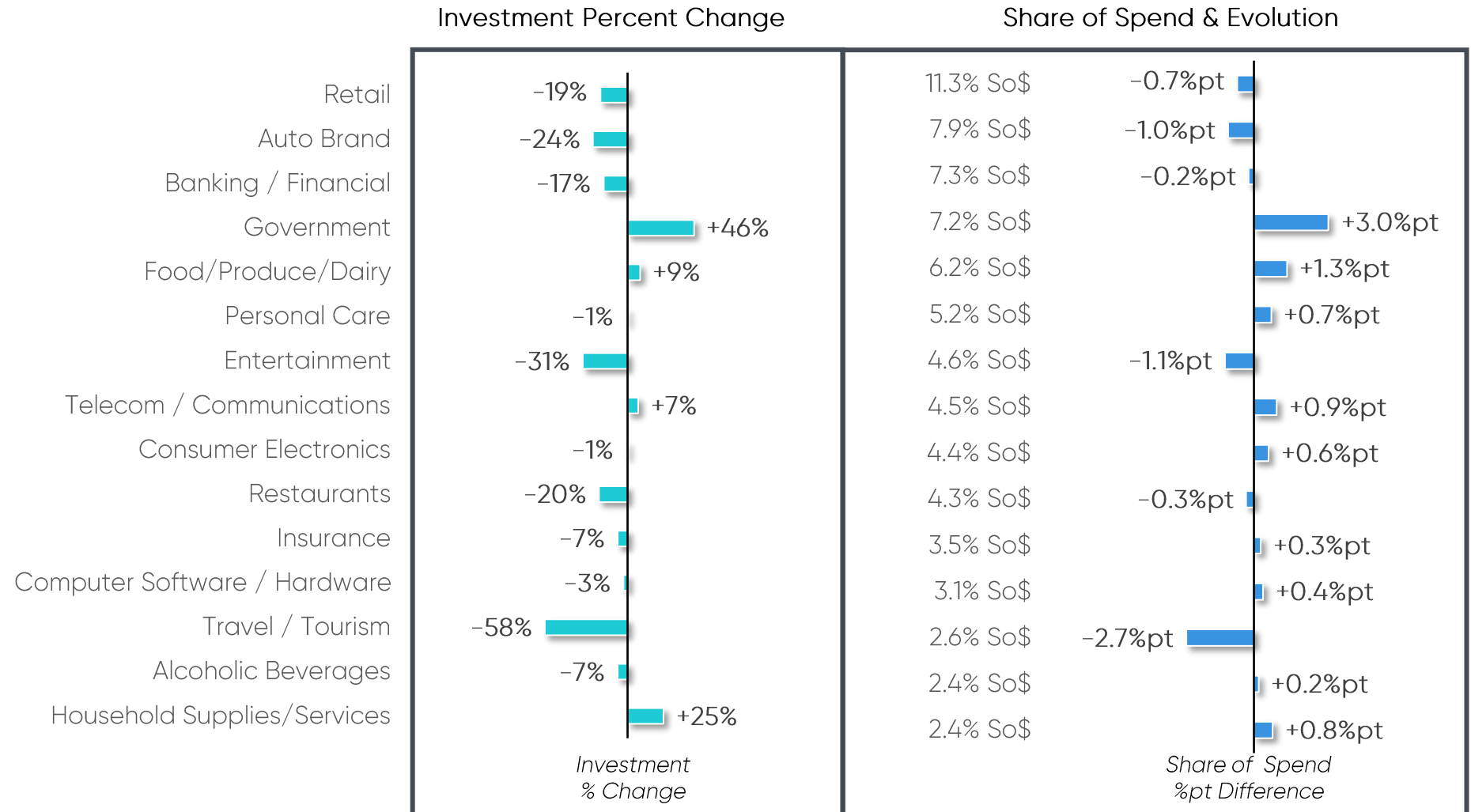


RETAIL, AUTO, AND BANKING MAINTAINED RESPECTIVE TOP 3 POSITIONS YOY DESPITE FALLING REVENUES

GOVERNMENT AND FOOD MOVED INTO THE TOP 5 YOY, WHILE ENTERTAINMENT AND TRAVEL SLID OUT

GOVERNMENT GAINED +3 SHARE POINTS, WHILE TRAVEL DECLINED BY THE SAME TOKEN

## Anglo Markets – Top 15 Categories (Excluding US) Jan – Dec 2020 YOY

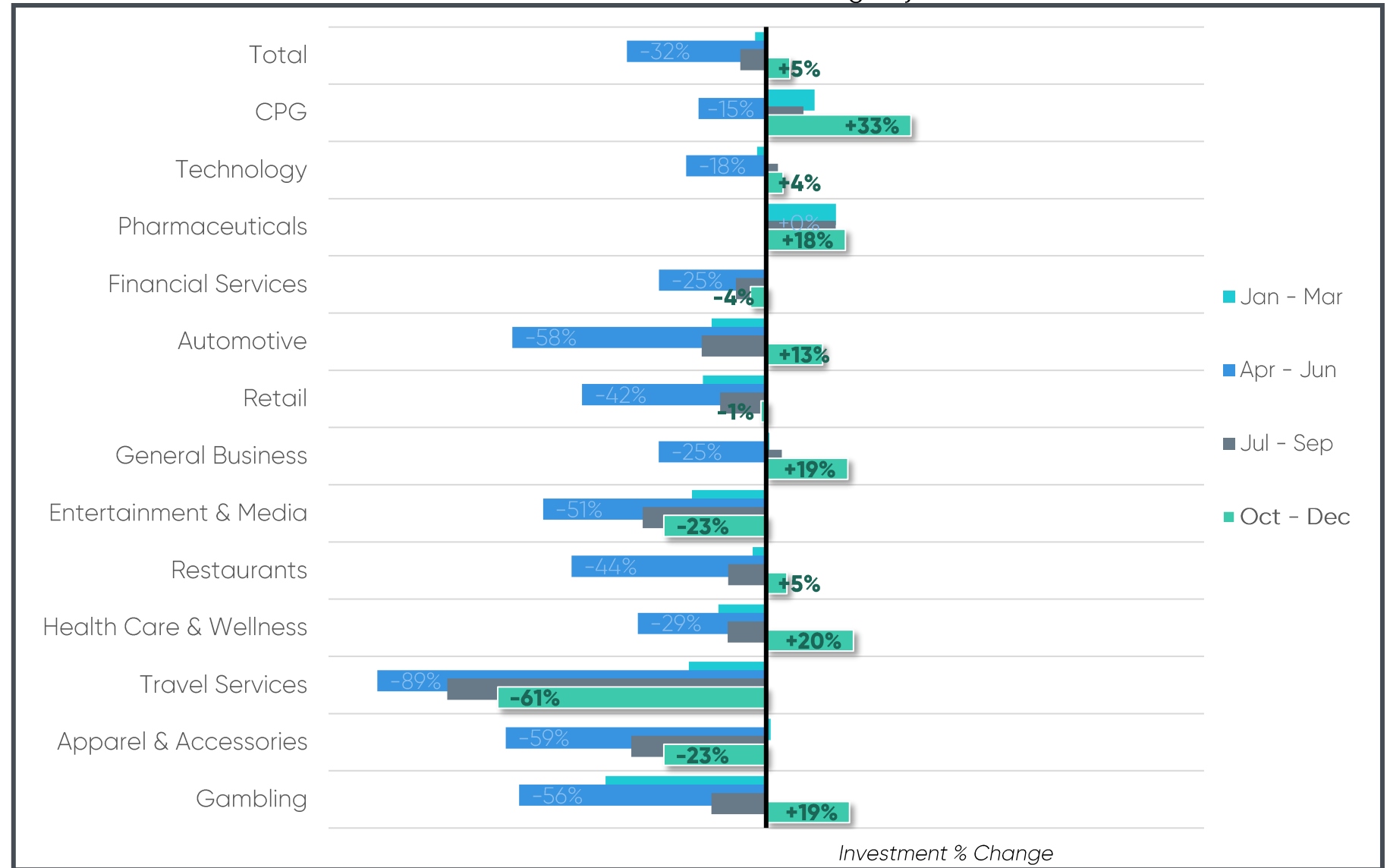


SEVERAL CATEGORY GROUPS NEWLY BOUNCED BACK IN Q4, SUCH AS AUTO (US / UK / NZ), RESTAURANTS (ALL), WELLNESS (UK / US/ AUS), AND GAMBLING (UK / AUS)

CPG MADE A SIGNIFICANT +33% PUSH IN Q4, ENDEAVORING TO RECOVER LOST AD DOLLARS DURING HOLIDAY GIFTING SEASON

PHARMACEUTICALS AND HEALTH CARE / WELLNESS REACHED APPROXIMATELY +20% GROWTH IN Q4, ALIGNING TO CONTINUED HEALTH CONCERNS

Anglo Markets – All Category Groups  
Jan – Dec 2020 YOY  
Investment Percent Change by Quarter



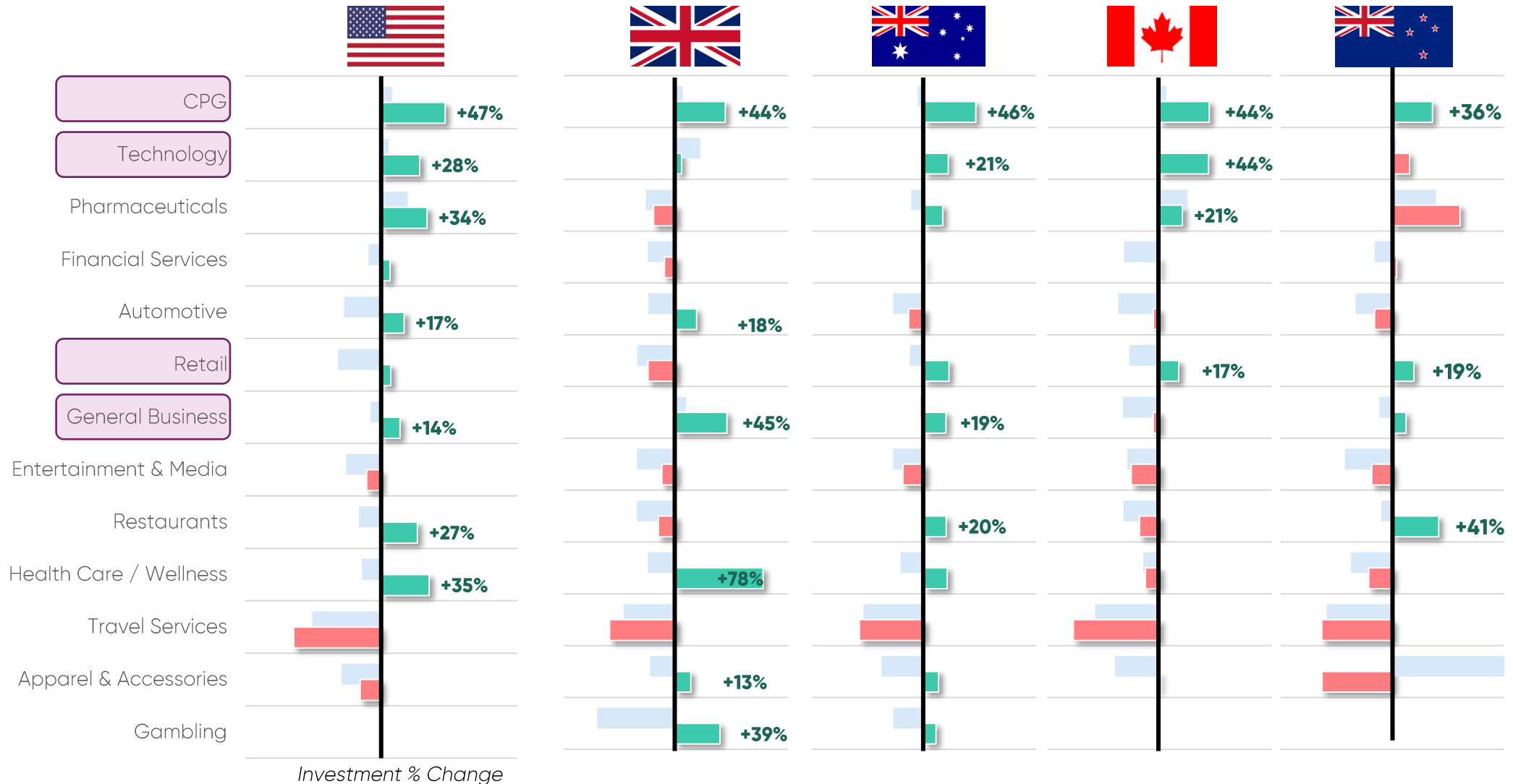
THE US & UK SHOW  
DIGITAL RECOVERY  
WITH ONLY THREE  
SECTORS DOWN IN 2H.

CPG & TECH  
EXPANDED ACROSS  
ALL ANGLOS IN 2H.  
CPG LED AVERAGE 2H  
GROWTH AT +43%.

PHARMACEUTICALS,  
RETAIL, AND GENERAL  
BUSINESS GENERATED  
2H LIFT IN FOUR OUT  
OF FIVE ANGLO  
MARKETS.






HEALTH CARE /  
WELLNESS,  
RESTAURANTS, AND  
FINANCIAL SERVICES  
ARE IMPROVED IN 2H,  
TRENDING POSITIVELY  
IN THREE MARKETS VS  
UNIVERSAL 1H DECLINE.

ENTERTAINMENT AND  
TRAVEL REMAIN  
CHALLENGED, WITH  
DECLINES ACROSS  
THE BOARD IN 1H & 2H.



# HOUSEHOLD SUPPLIES AND FOOD SECTORS WERE COMMON DRIVERS OF INCREMENTAL SPEND ACROSS ANGLO MARKETS IN 2020, WHILE TRAVEL AND ENTERTAINMENT WERE MOST PREVALENT DETRACTORS






Anglo Markets – All Media Investment  
Top Investment & Divestment Categories  
Jan – Dec 2020 YOY

Anglo Markets Total					
<b>Category Wins</b>	<b>Category Wins</b>	<b>Category Wins</b>	<b>Category Wins</b>	<b>Category Wins</b>	<b>Category Wins</b>
Pharmaceuticals +17%	Pharmaceuticals +17%	Telecom / Communications +37%	Health Care +98%	Household Supplies/Services +34%	Government +46%
Household Supplies/Services +31%	Household Supplies/Services +31%	Food/Produce/ Dairy +22%	Computer Software / Hardware +31%	Insurance +19%	Food/Produce/ Dairy +7%
Food/Produce/ Dairy +9%	Food/Produce/ Dairy +9%	Household Supplies/Services +19%	Food/Produce/ Dairy +6%	Consumer Electronics +9%	Household Supplies/Services +26%
<b>Category Losses</b>	<b>Category Losses</b>	<b>Category Losses</b>	<b>Category Losses</b>	<b>Category Losses</b>	<b>Category Losses</b>
Entertainment -36%	Entertainment -37%	Retail -31%	Travel / Tourism -58%	Auto Brand -30%	Travel / Tourism -60%
Travel / Tourism -60%	Travel / Tourism -61%	Travel / Tourism -52%	Auto Brand -31%	Entertainment -42%	Retail -16%
Retail -16%	Retail -15%	Restaurants -38%	Entertainment -38%	Auto Dealers -29%	Entertainment -49%



IN Q4, AUTO (US) & RETAIL (AUS) EMERGE AS A TOP INCREMENTAL SPEND DRIVERS, WHILE BEVERAGES ALSO RISE. Q4 HOLIDAY FASHION SUFFERED IN THE US, JOINING THE MORE TYPICAL SECTORS AS A FALLOUT CONTRIBUTOR.

Anglo Markets – All Media Investment  
Top Investment & Divestment Categories  
Oct – Dec 2020 YOY

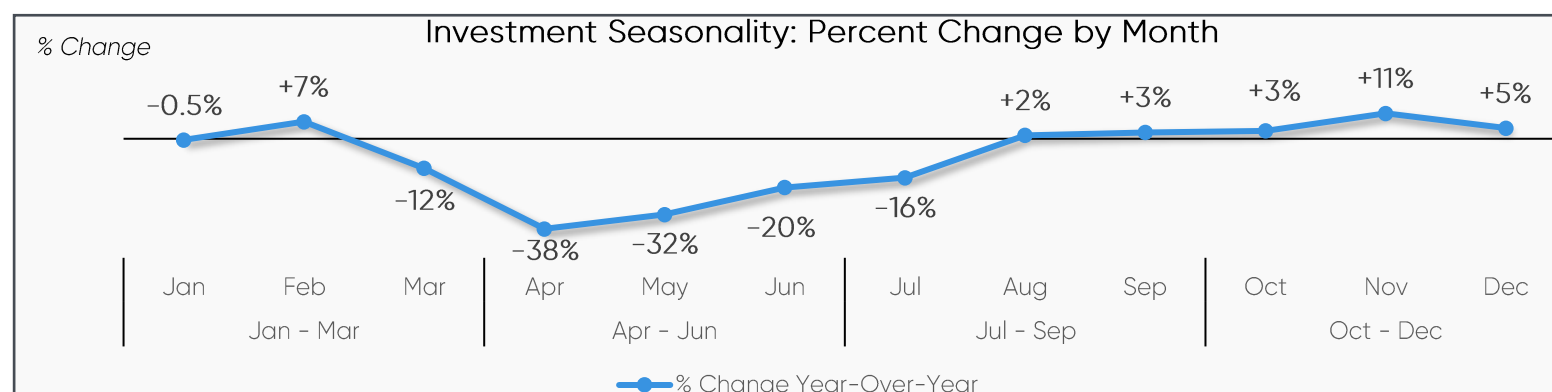
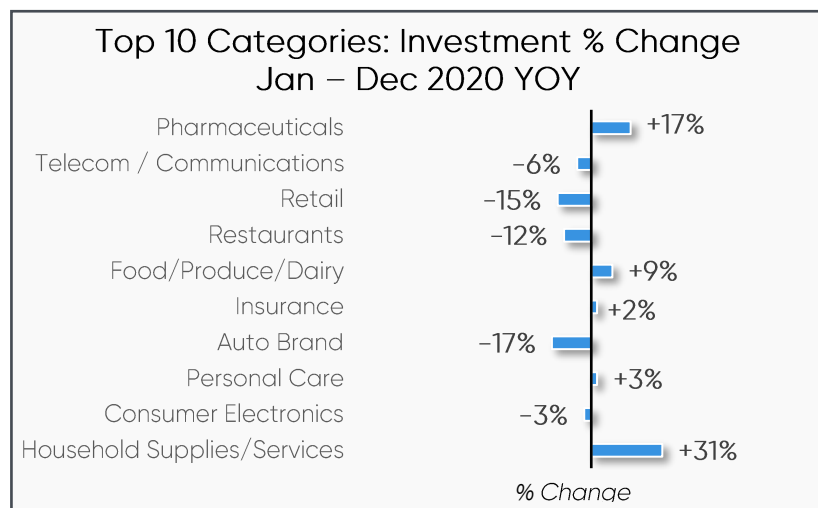
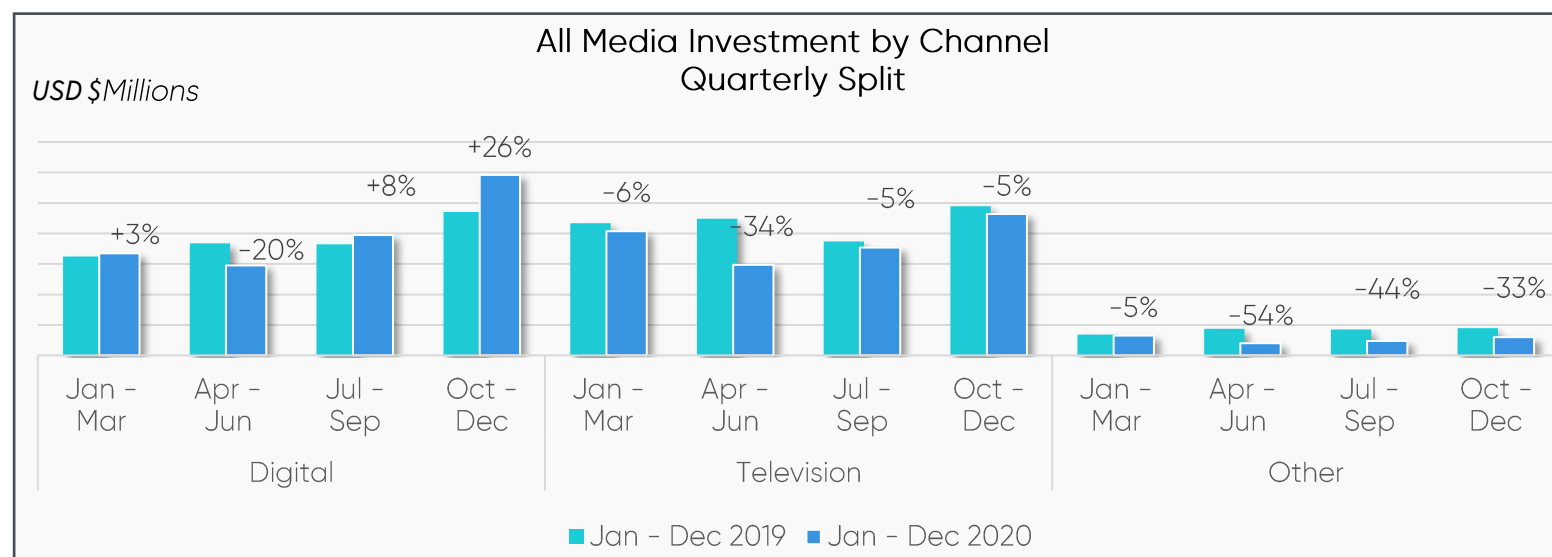
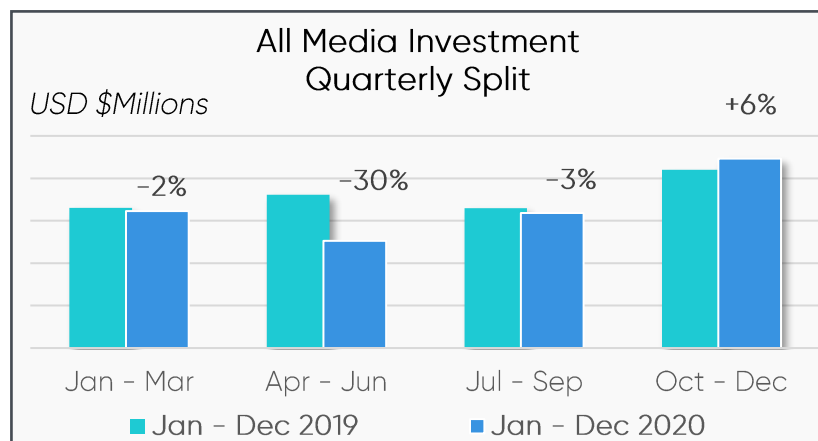
Anglo Markets Total					
Category Wins	Category Wins	Category Wins	Category Wins	Category Wins	Category Wins
Pharmaceuticals +23%	Pharmaceuticals +23%	Telecom / Communications +55%	Food/Produce/ Dairy +65%	Household Supplies/Services +111%	Government +53%
Food/Produce/ Dairy +31%	Household Supplies/Services +48%	Food/Produce/ Dairy +27%	Retail +11%	Food/Produce/ Dairy +29%	Food/Produce/ Dairy +29%
Household Supplies/Services +50%	Auto Brand +24%	Alcoholic Beverages +47%	Alcoholic Beverages +44%	Non-Alcoholic Beverages +39%	Non-Alcoholic Beverages +58%
Category Losses	Category Losses	Category Losses	Category Losses	Category Losses	Category Losses
Entertainment -37%	Entertainment -39%	Retail -21%	Travel / Tourism -54%	Entertainment -45%	Travel / Tourism -46%
Travel / Tourism -61%	Travel / Tourism -61%	Travel / Tourism -58%	Entertainment -31%	Travel / Tourism -83%	Retail -11%
Fashion / Accessories -23%	Fashion / Accessories -25%	Computer Soft / Hardware -24%	Media -43%	Auto Dealers -16%	Entertainment -42%

# MARKET SNAPSHOT

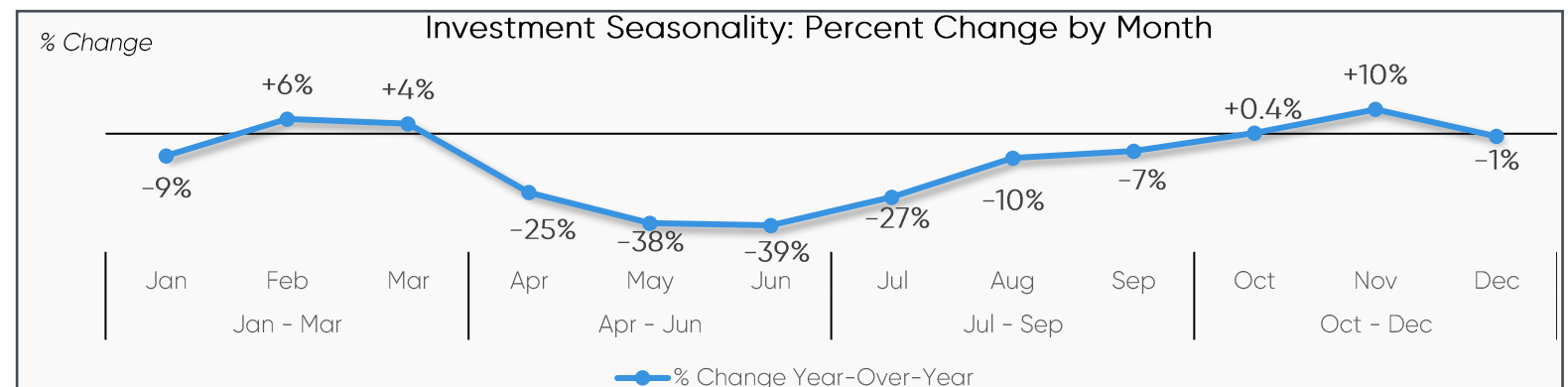
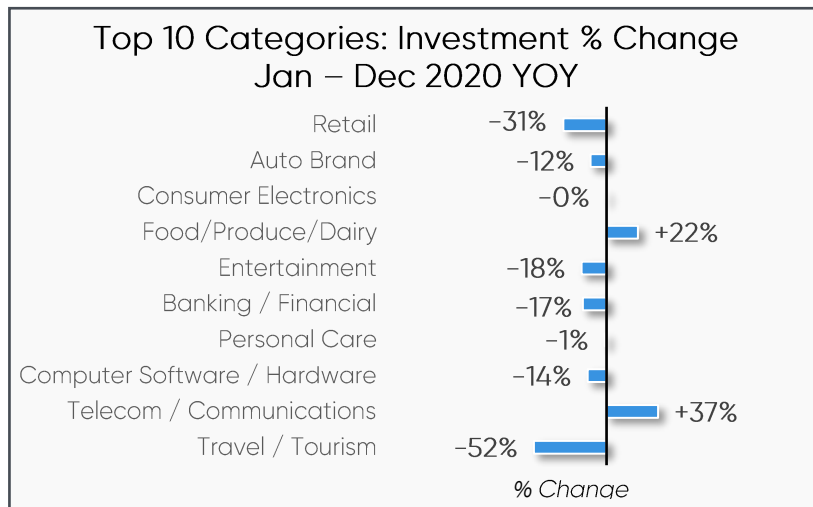
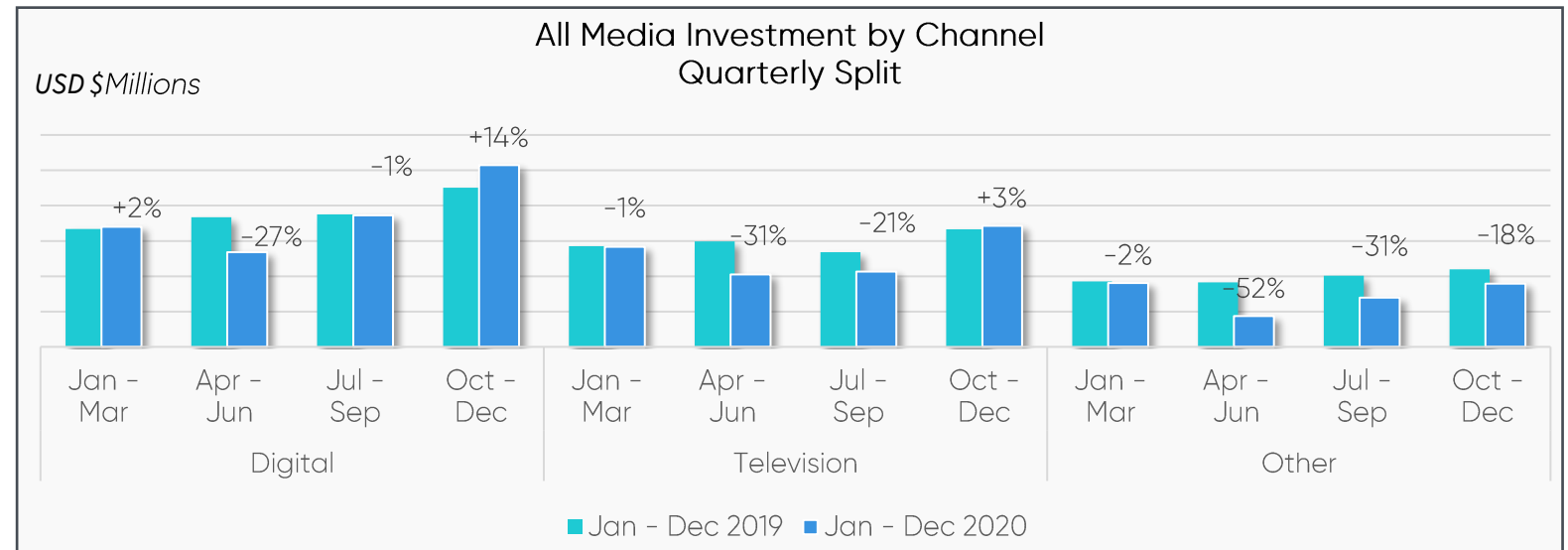
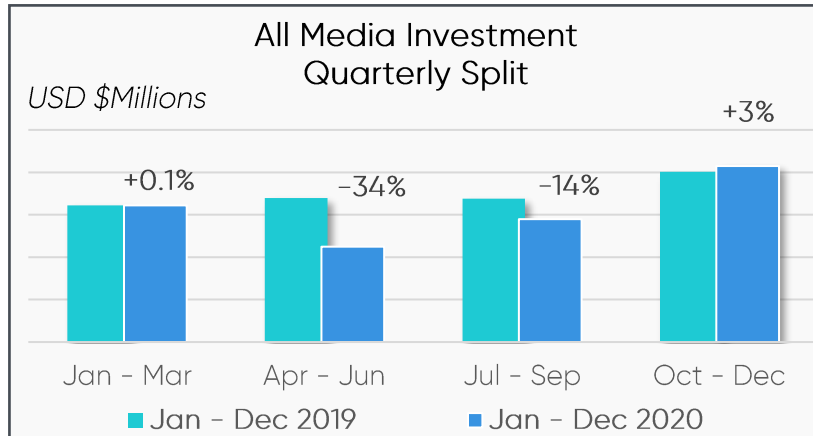
THE US TURNS A CORNER TO GROWTH IN Q4, PACING +6%, FUELED ENTIRELY BY DIGITAL. PHARMACEUTICALS, HOUSEHOLD SUPPLIES, AND AUTO BRANDS BROUGHT AN INFLUX OF DOLLARS IN THE LAST QUARTER OF THE YEAR.



USA



LIKE THE US, THE UK ALSO REACHED GROWTH IN Q4. HOWEVER, THE UK AUGMENTED DIGITAL GROWTH WITH TV GROWTH. INCREMENTAL SPEND FROM TELECOM, FOOD, AND ALCOHOLIC BEV MARKETING PUSHED Q4 UPWARD.

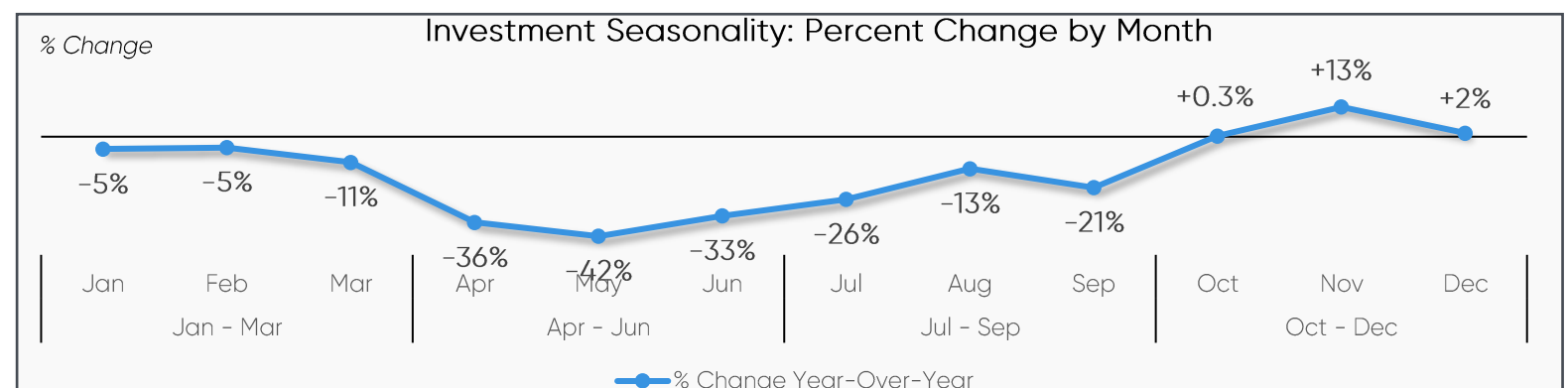
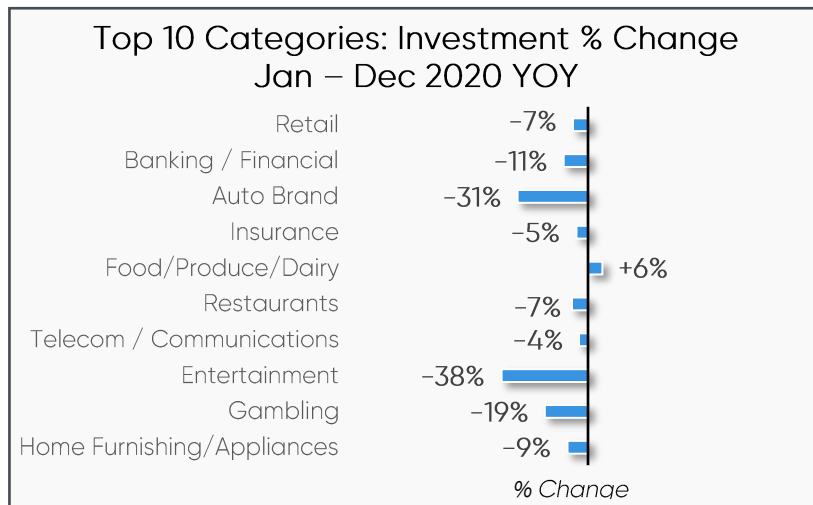
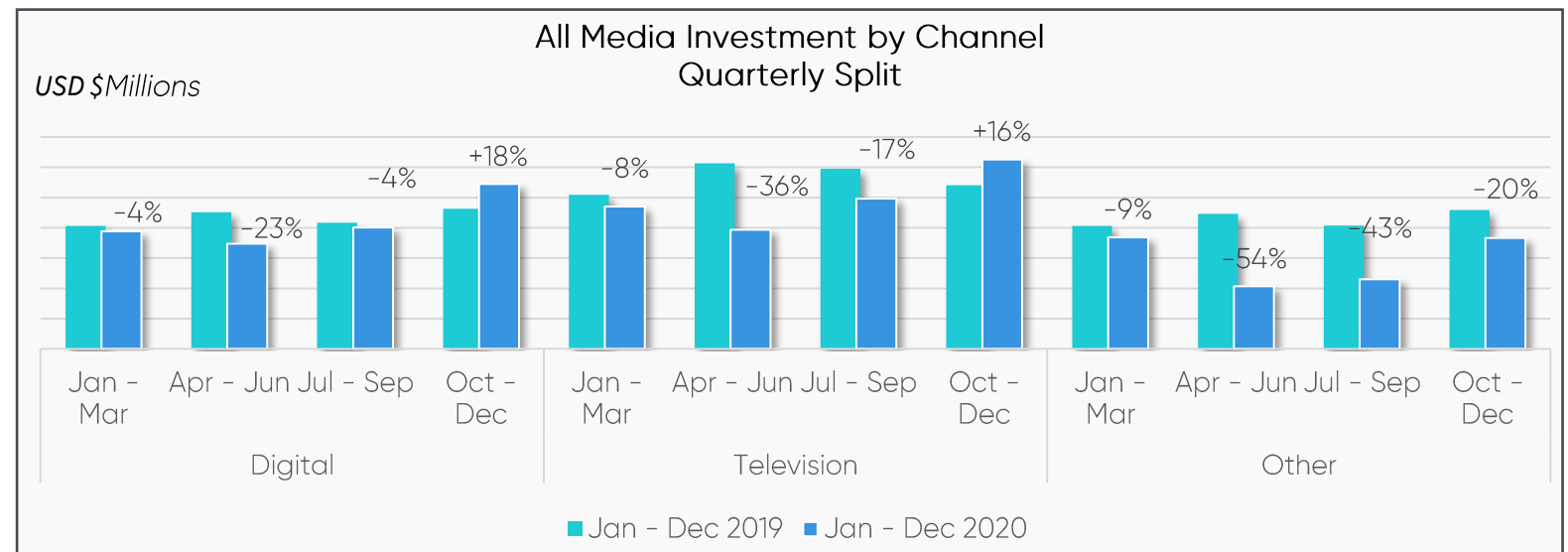
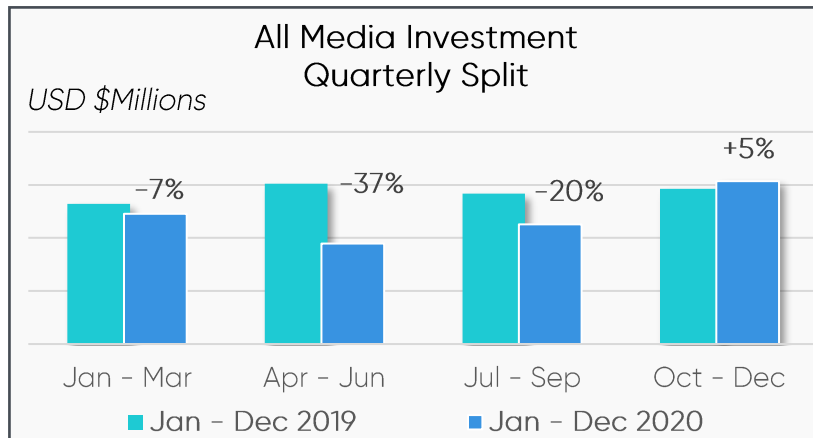




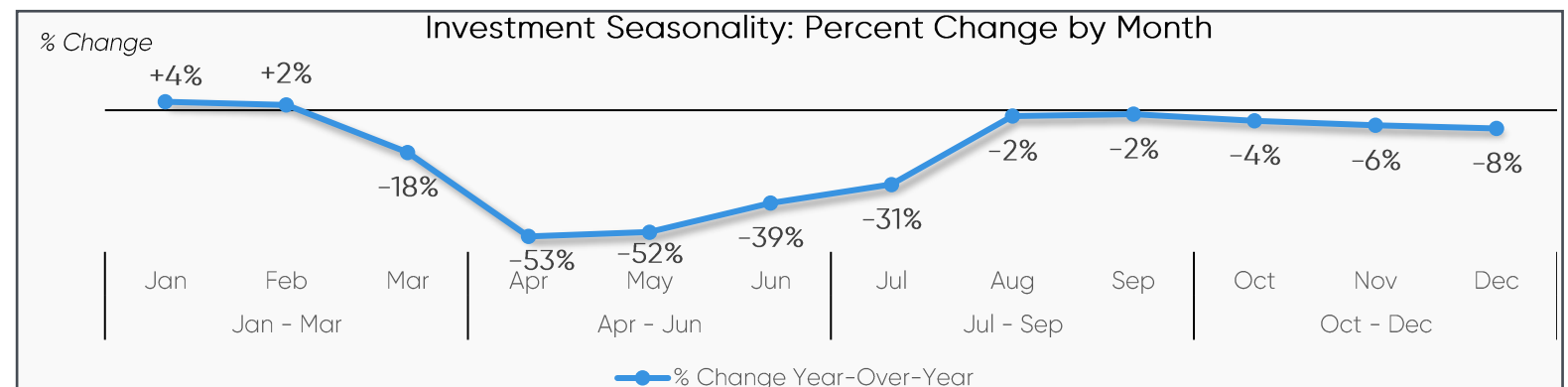
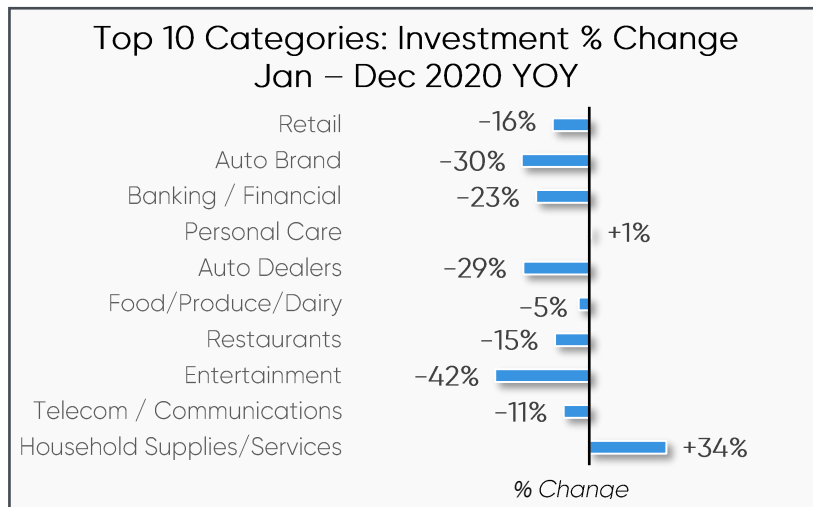
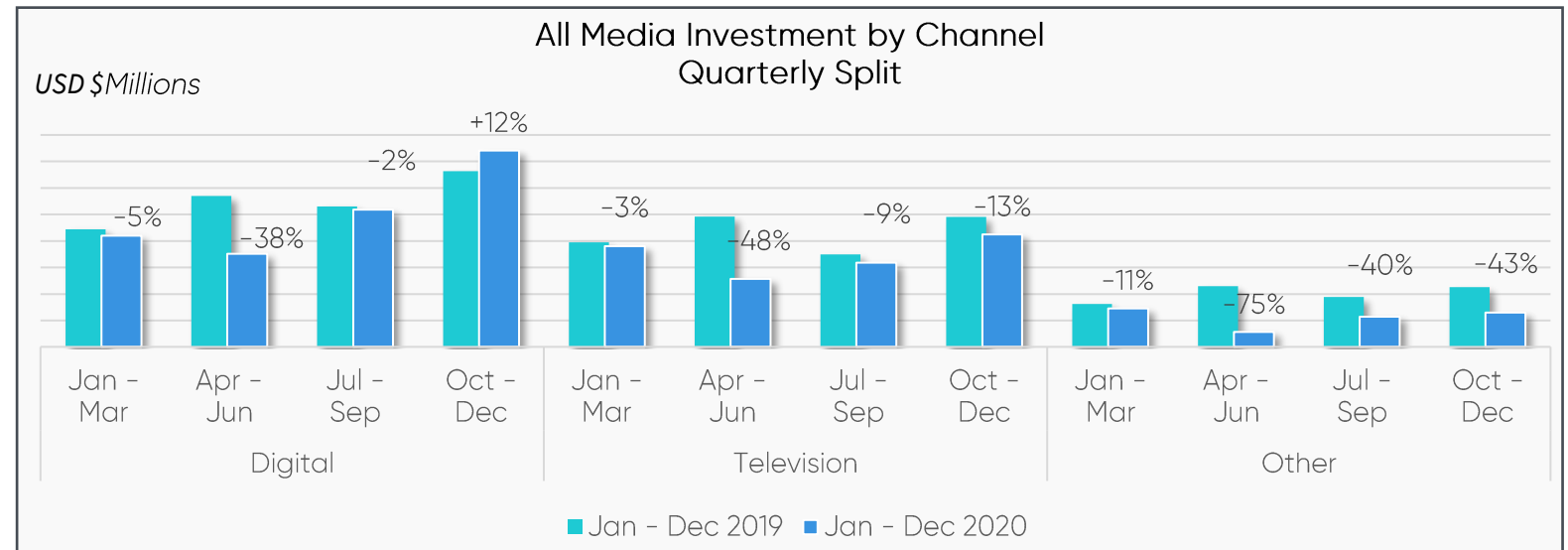
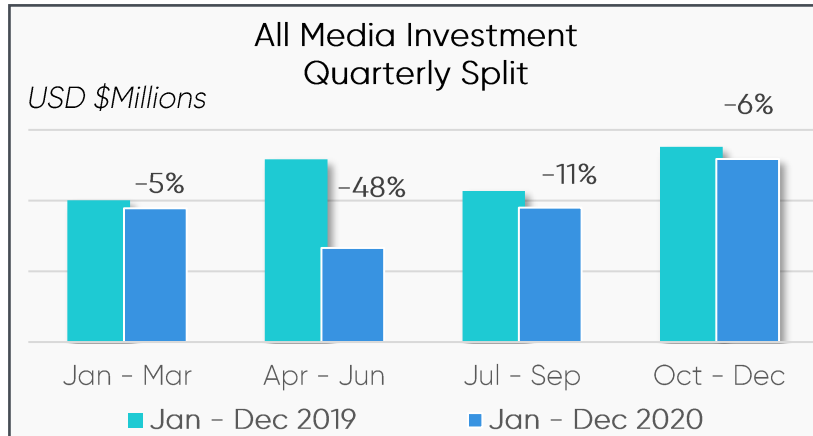
NEW AUS LIFT WITHIN DIGITAL & TV BROUGHT Q4 INTO A POSITIVE +5% TREND. IN Q4, INCREASED RETAIL AND ALCOHOLIC BEVERAGES INVESTMENT SHOWED APPETITE TO REACH NON-ESSENTIAL SPENDERS.



AUS



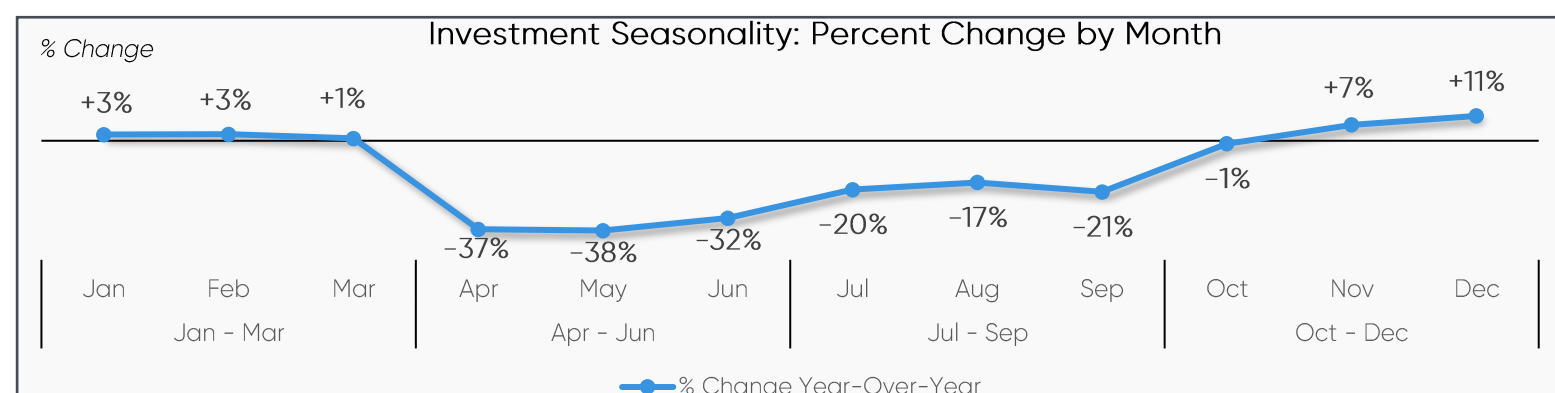
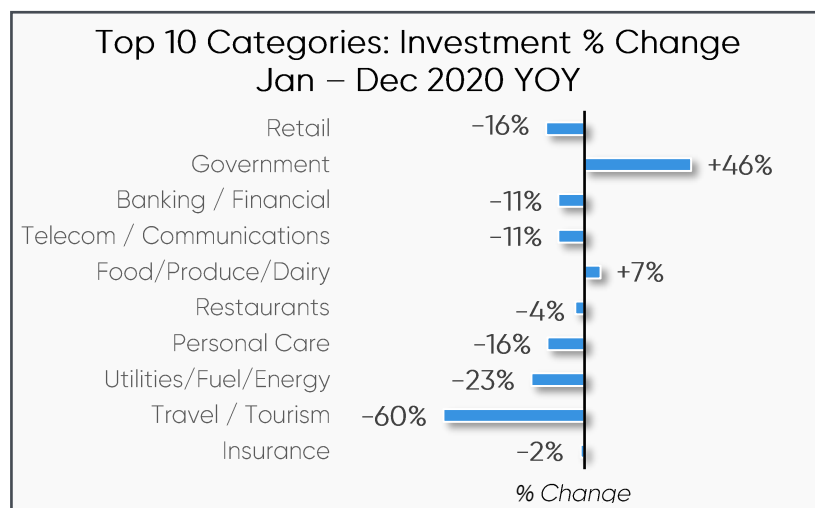
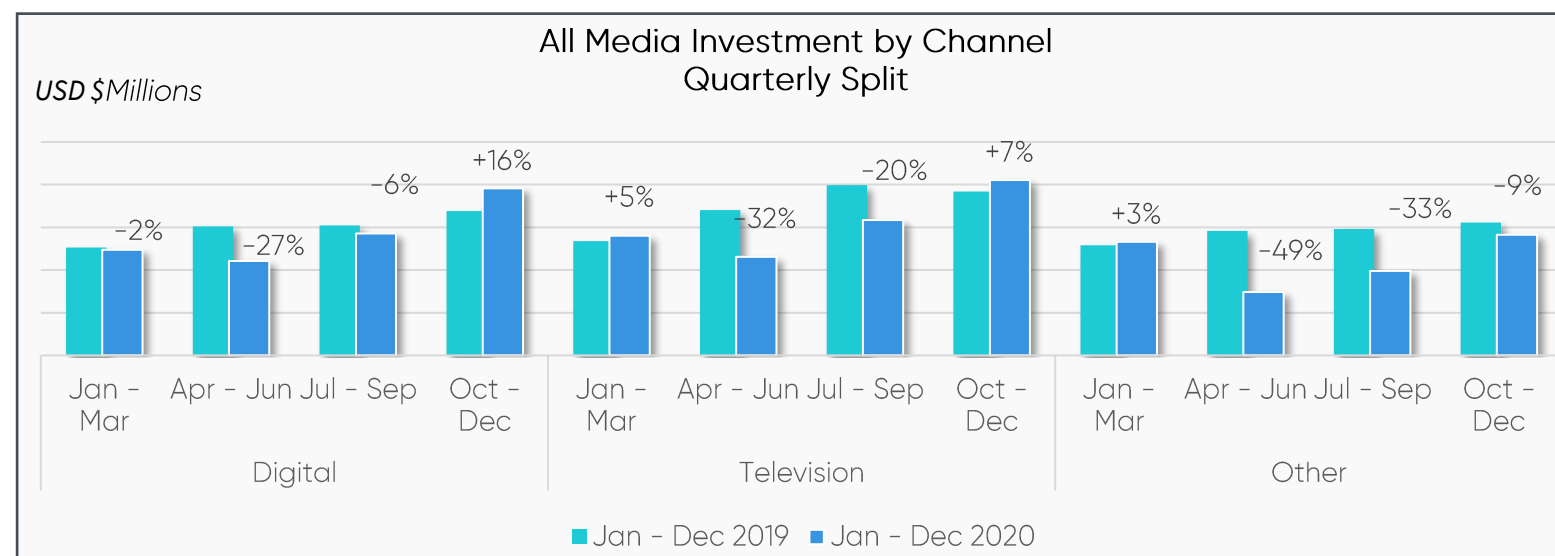
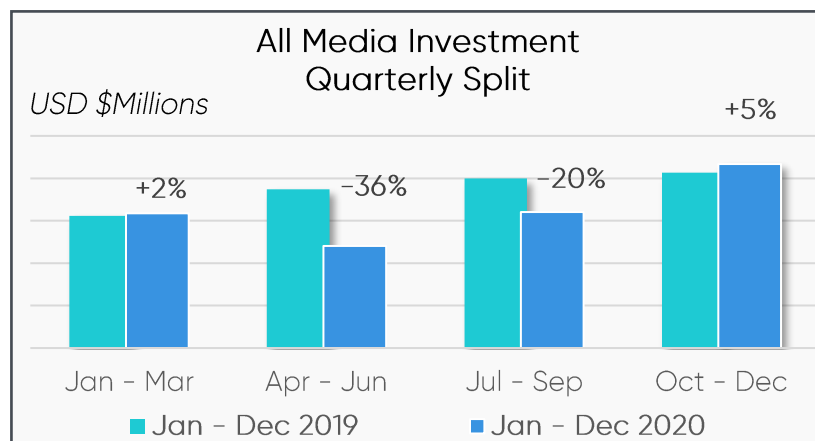
CANADA'S -48% DECLINE IN Q2 WAS THE MOST PRONOUNCED OF ANY MARKET BUT HAS CLIMBED BACK TO -6% IN Q4 FOLLOWING DOUBLE-DIGIT DIGITAL LIFT. CONTRACTING SPEND FROM ENTERTAINMENT / TRAVEL IN Q4 PULLED THE MARKET DOWN DESPITE STRONG IMPROVEMENT FROM HOUSEHOLD SUPPLIES.



NEW ZEALAND SLIGHTLY SURPASSED PRE-PANDEMIC QUARTERLY GROWTH LEVELS IN Q4, AT +5%. DIGITAL AND TV ALIKE FUELED MOMENTUM. NZ SHOWED THE LEAST DECLINE IN OTHER OFFLINE DURING Q4, CARRIED BY RADIO.



NZ





**Standard  
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