

ANGLO MARKET INTELLIGENCE
OCT 2019 – SEP 2020

NOVEMBER 2020



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



US & CAN NORMALIZE

Return of delayed NBA & NHL playoffs during July – September benefits these markets.



DIGITAL FOOTPRINT GROWS

Allocation peaks in July – September for three out five Anglo markets, as US carries growth.



DISCRETIONARY SECTORS SLOWLY EMERGE

Non-essential categories start becoming top growth drivers in July – September, pointing to turnaround.



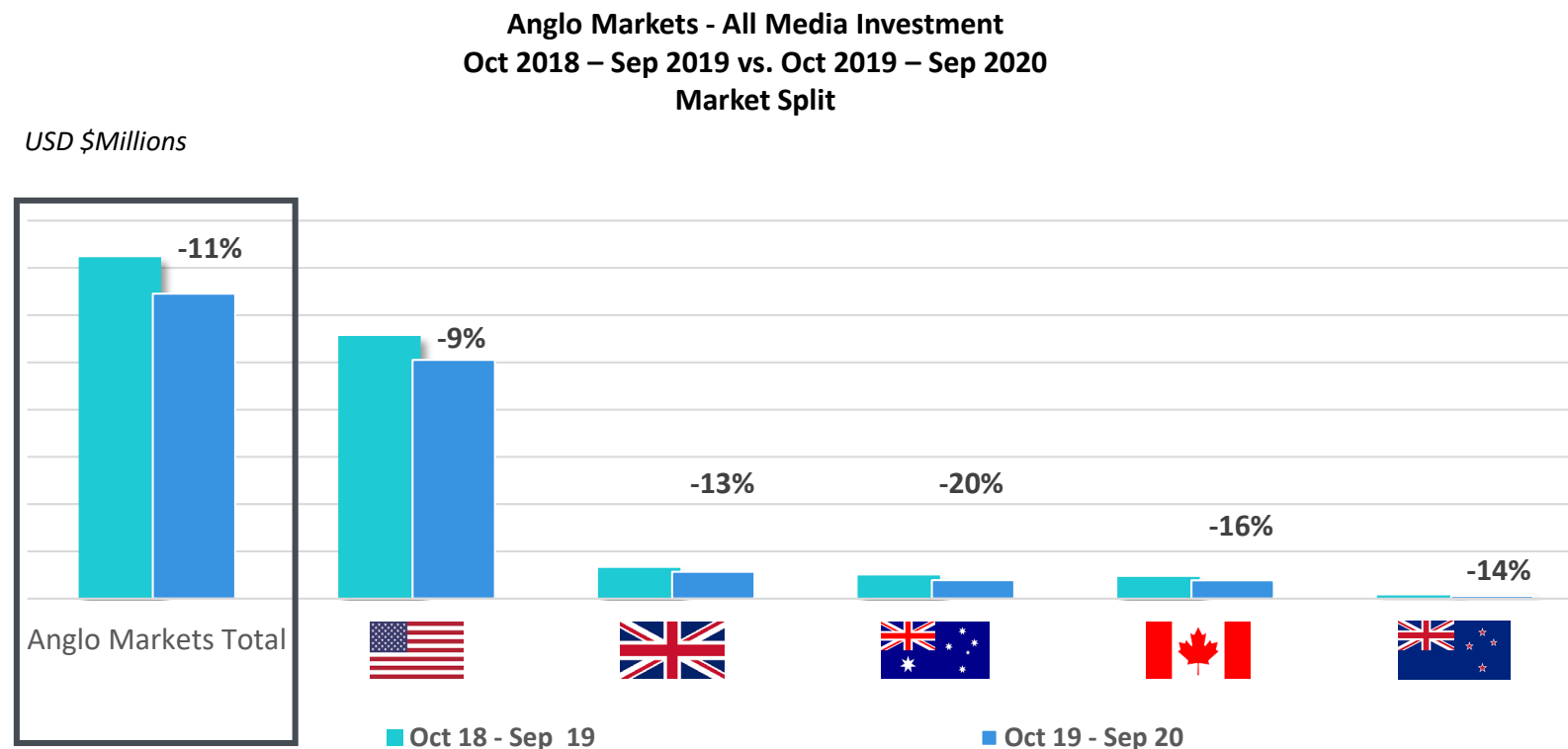
KEY OWNERS CORRECT COURSE

Major owners see strong advertiser return in July – September vs the early pandemic.

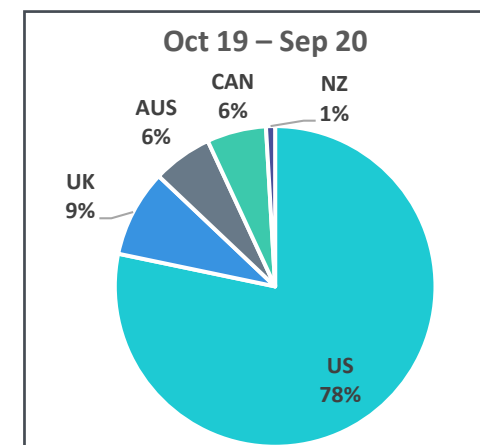
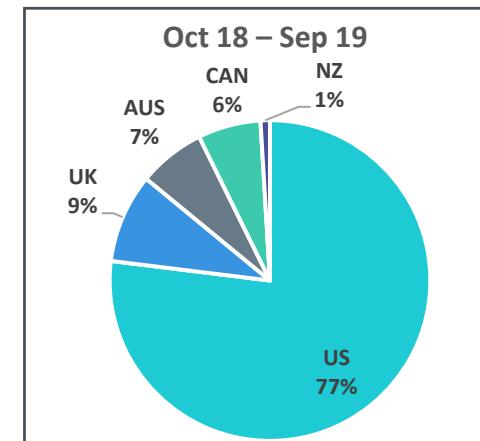
ANGLO MARKETS OVERVIEW

OCT 2019 – SEP 2020

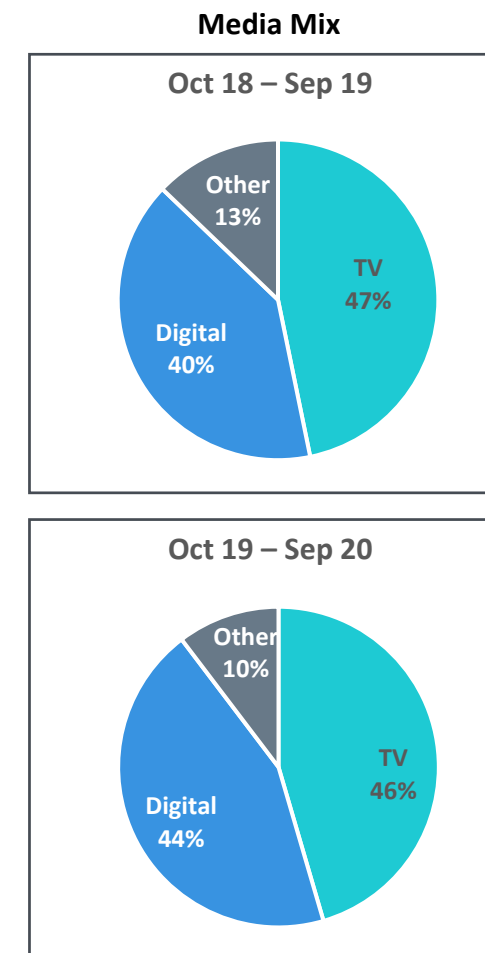
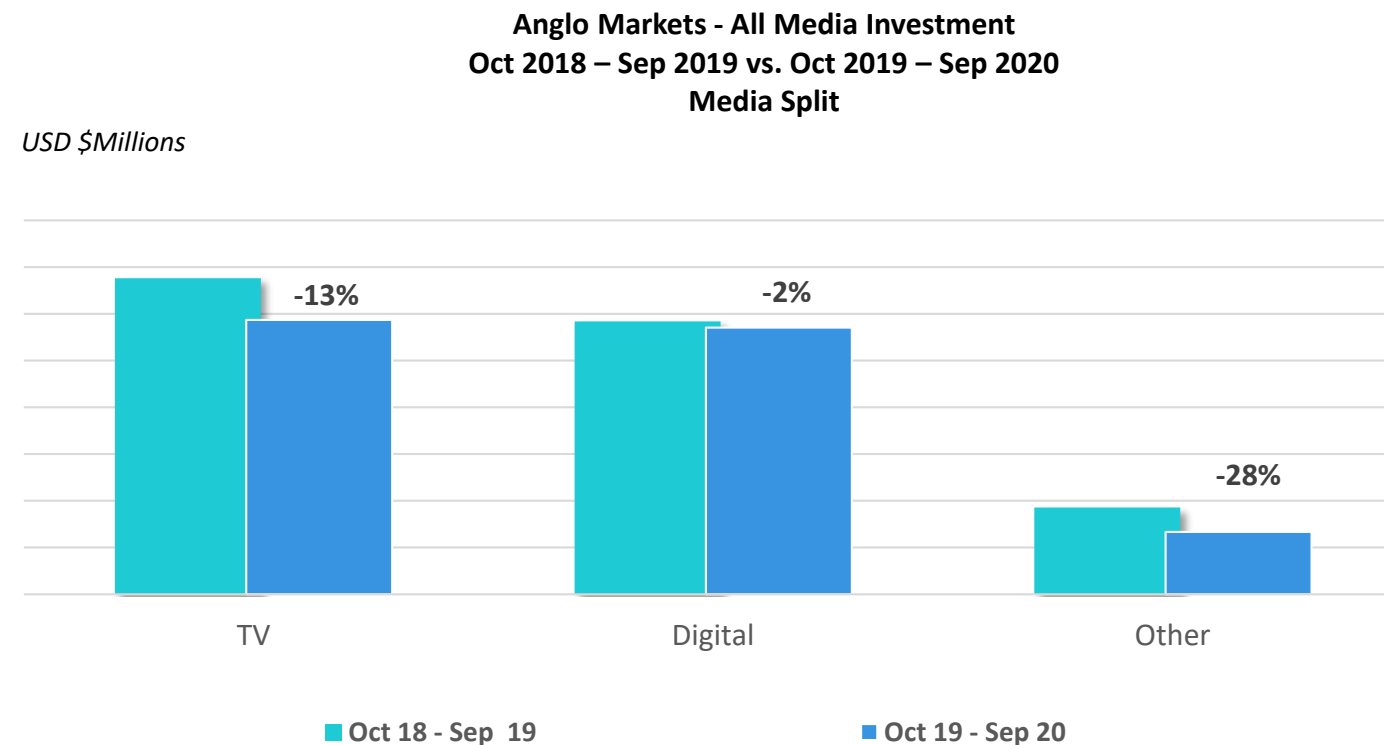
IN THE LAST TWELVE MONTHS, US MEDIA INVESTMENT DECLINED -9% WHILE THE OTHER MARKETS AVERAGED A STEEPER -16% SHORTFALL



Share of Investment by Market

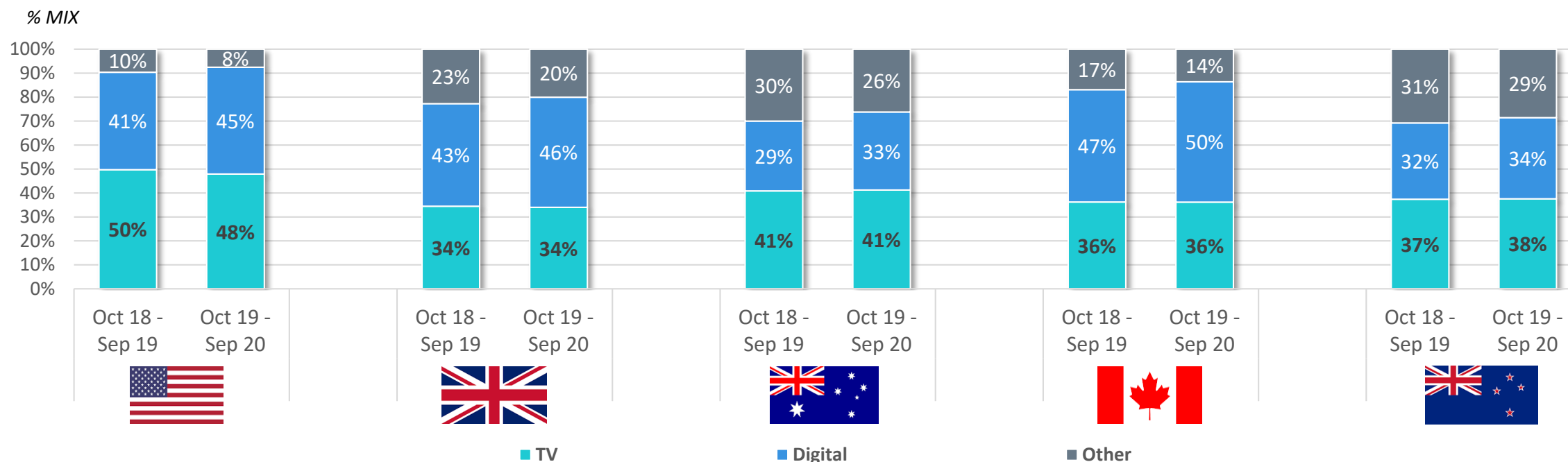


DIGITAL CLOSED THE GAP VS TELEVISION, AS DOLLARS SHIFTED OUT OF OTHER OFFLINE CHANNELS

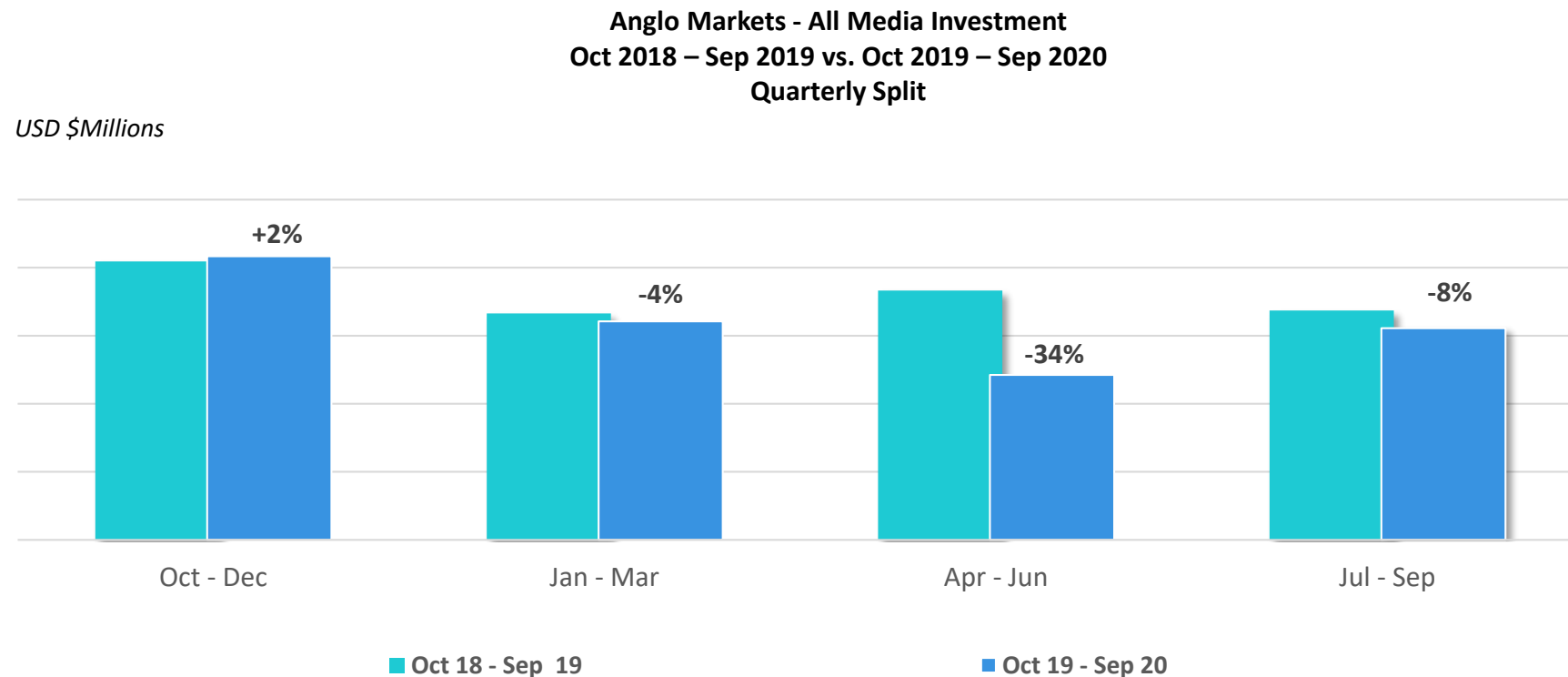


DIGITAL UNIVERSALLY EXPANDED, GROWING CONTRIBUTION BY AN AVERAGE OF +3PTS AND REACHING ROUGHLY HALF OF SPEND FOR ALL BUT AUS & NZ

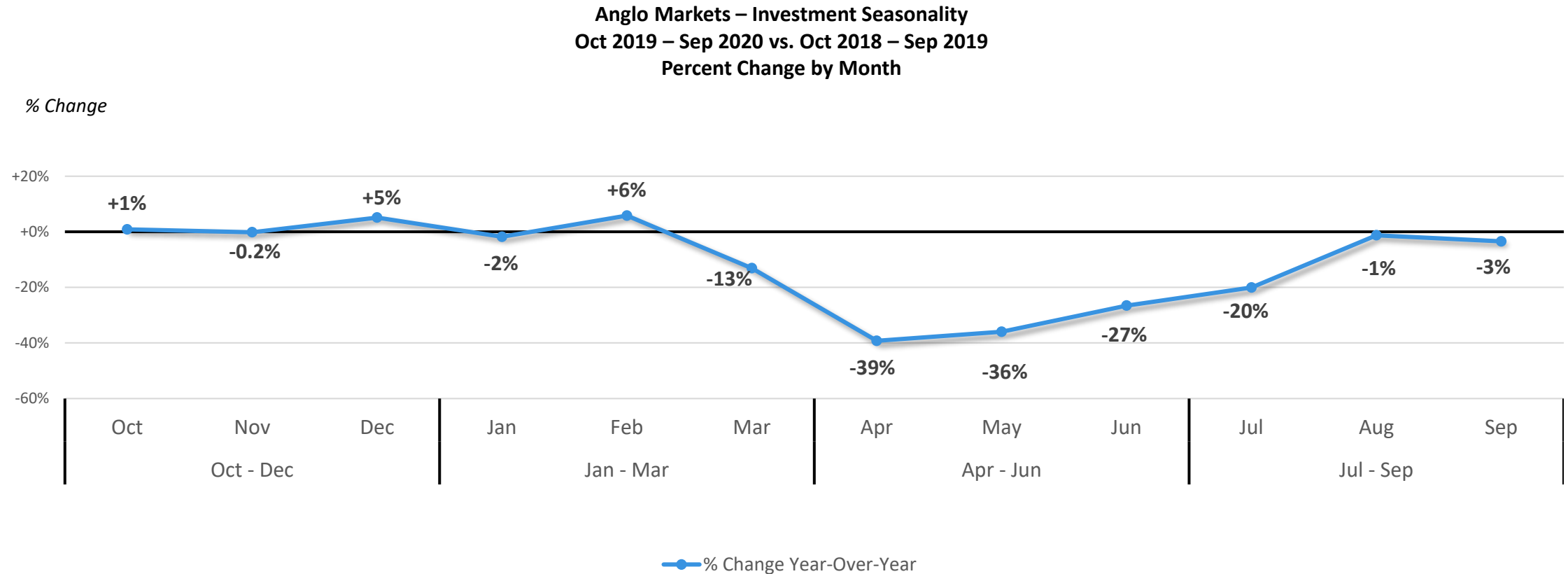
Anglo Markets – Media Mix
Oct 2018 – Sep 2019 vs. Oct 2019 – Sep 2020
Market Split



THE MOST RECENT QUARTER BEGINS TO NORMALIZE FOLLOWING THE STEEP -34% DOWNTURN DURING APRIL TO JUNE, AS COVID-19 TOOK HOLD

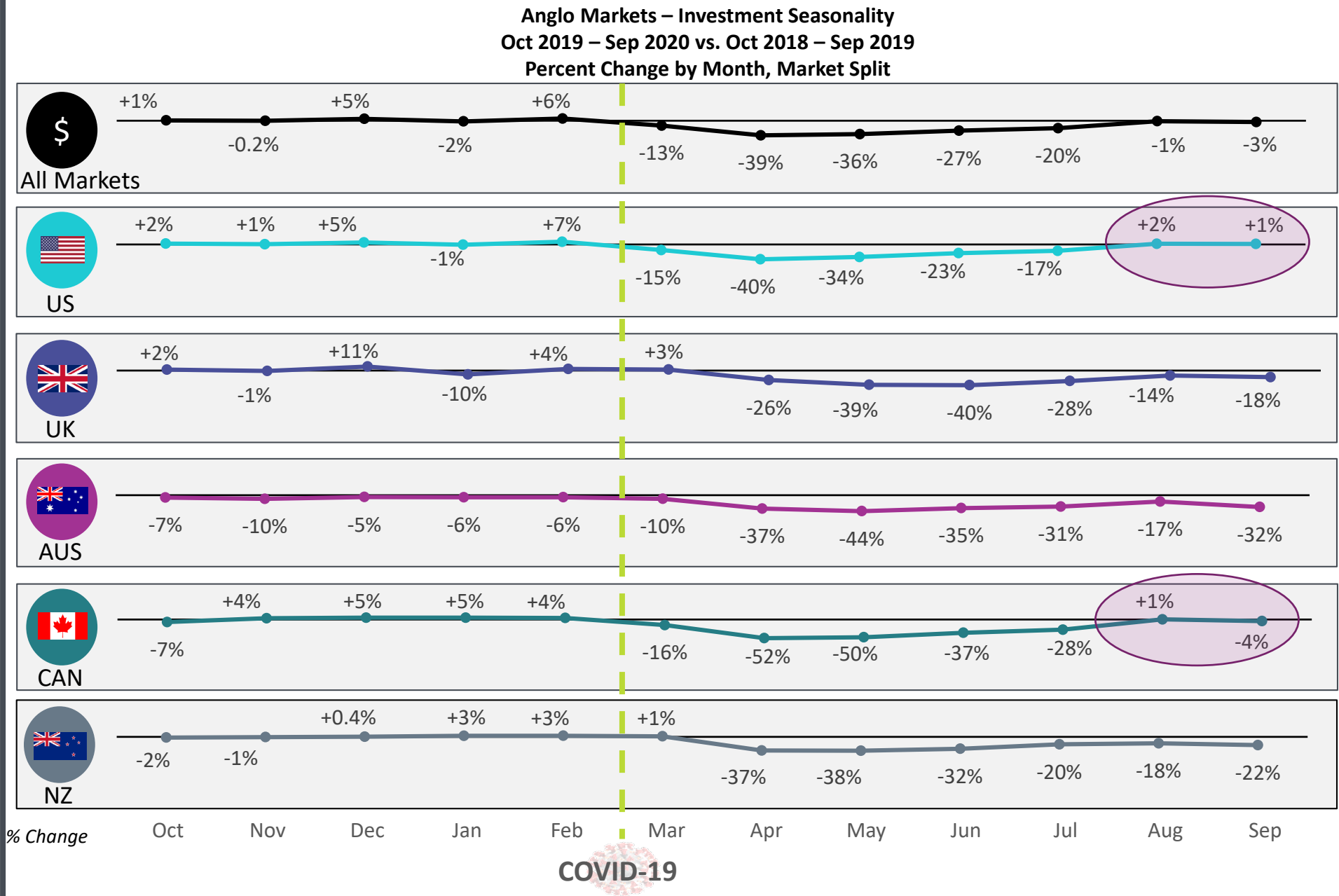


AUGUST & SEPTEMBER CLIMBED BACK TO MODEST DECLINE VS THE SUSTAINED MARCH TO JULY TROUGH, DRIVEN BY RETURNING SPORTS IN THE US & CANADA



DELAYED NHL & NBA PLAYOFF SEASONS
RESUME IN THE LAST TWO MONTHS,
HELPING THE US & CANADA TO STABILIZE

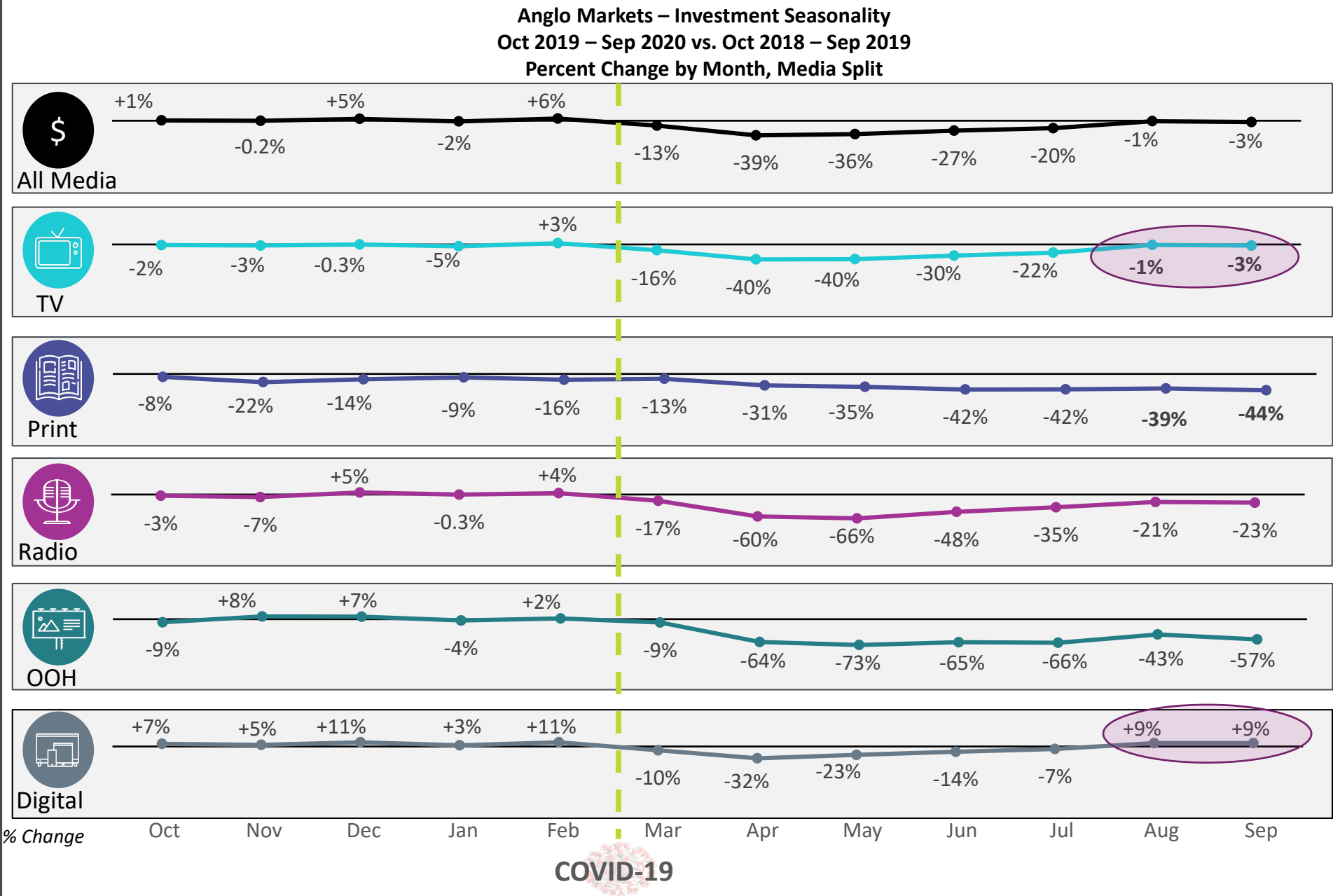
THE US AND CANADA ARE FIRST TO ACHIEVE POST-MARCH GROWTH



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

DIGITAL FUELED
AUGUST AND
SEPTEMBER
RECOVERY, AS
THE ONLY
CHANNEL LIFT

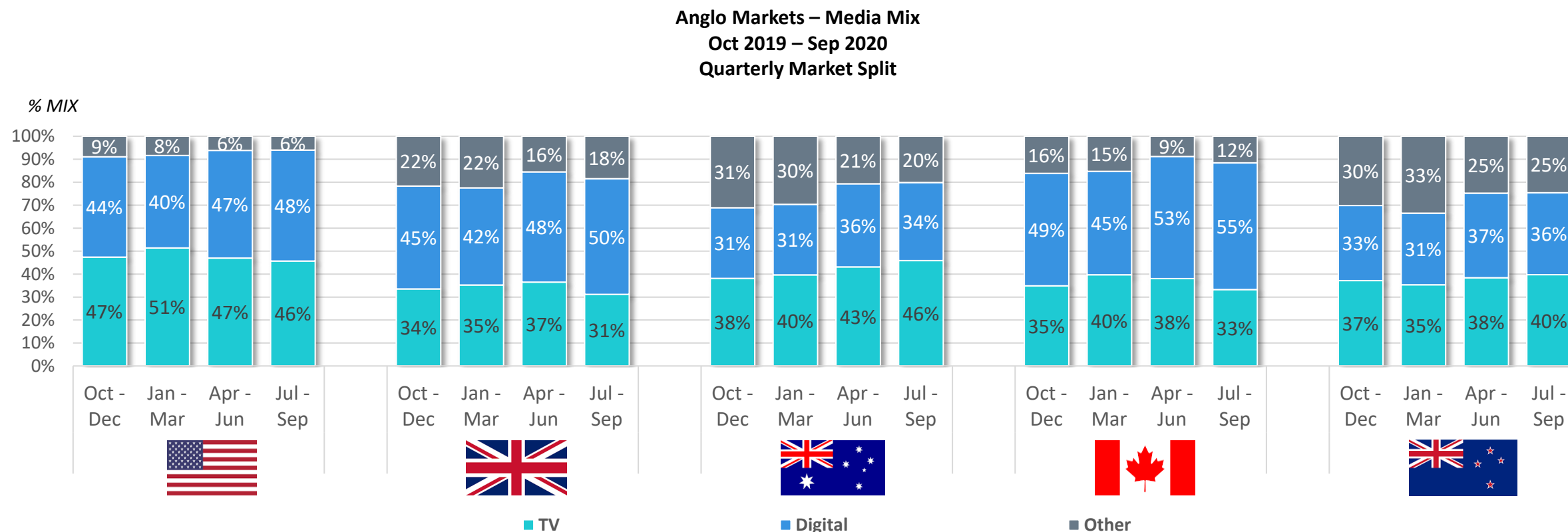
TV IMPROVED IN
RECENT
MONTHS,
HOWEVER,
ESCAPING
DOUBLE-DIGIT
DECLINES



Source: SMI Pool | Markets include USA, UK, Canada, Australia, New Zealand
Media formats include TV, Magazines, Newspapers, OOH/Cinema, Radio, and Digital
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* Not showing Other media (e.g. direct mail)

IN THE MOST RECENT QUARTER, DIGITAL NOTABLY LEADS TV BY ROUGHLY 20PTS IN THE UK AND CANADA AND NEWLY SURPASSES TV IN THE US

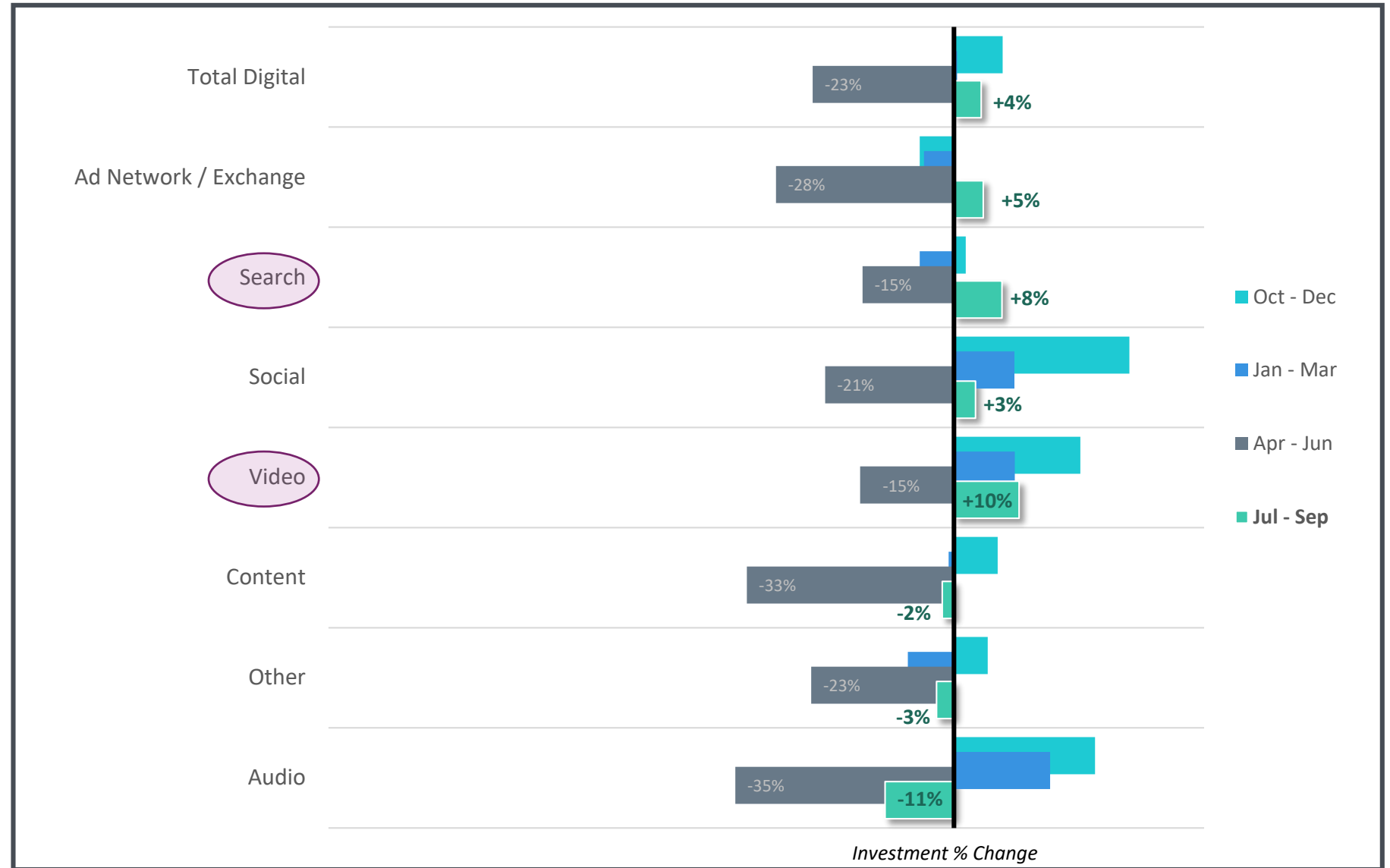


DOUBLE-DIGIT
DECLINES SPANNED
ALL DIGITAL
FORMATS IN APR –
JUN VS LAST YEAR

IN JUL – SEP, DRIVEN
BY THE US, MOST
FORMATS EXCEPT
AUDIO IMPROVE TO
GROWTH OR PARITY
VS LAST YEAR

VIDEO & SEARCH
HAVE FARED BEST
QUARTERLY SINCE
APRIL

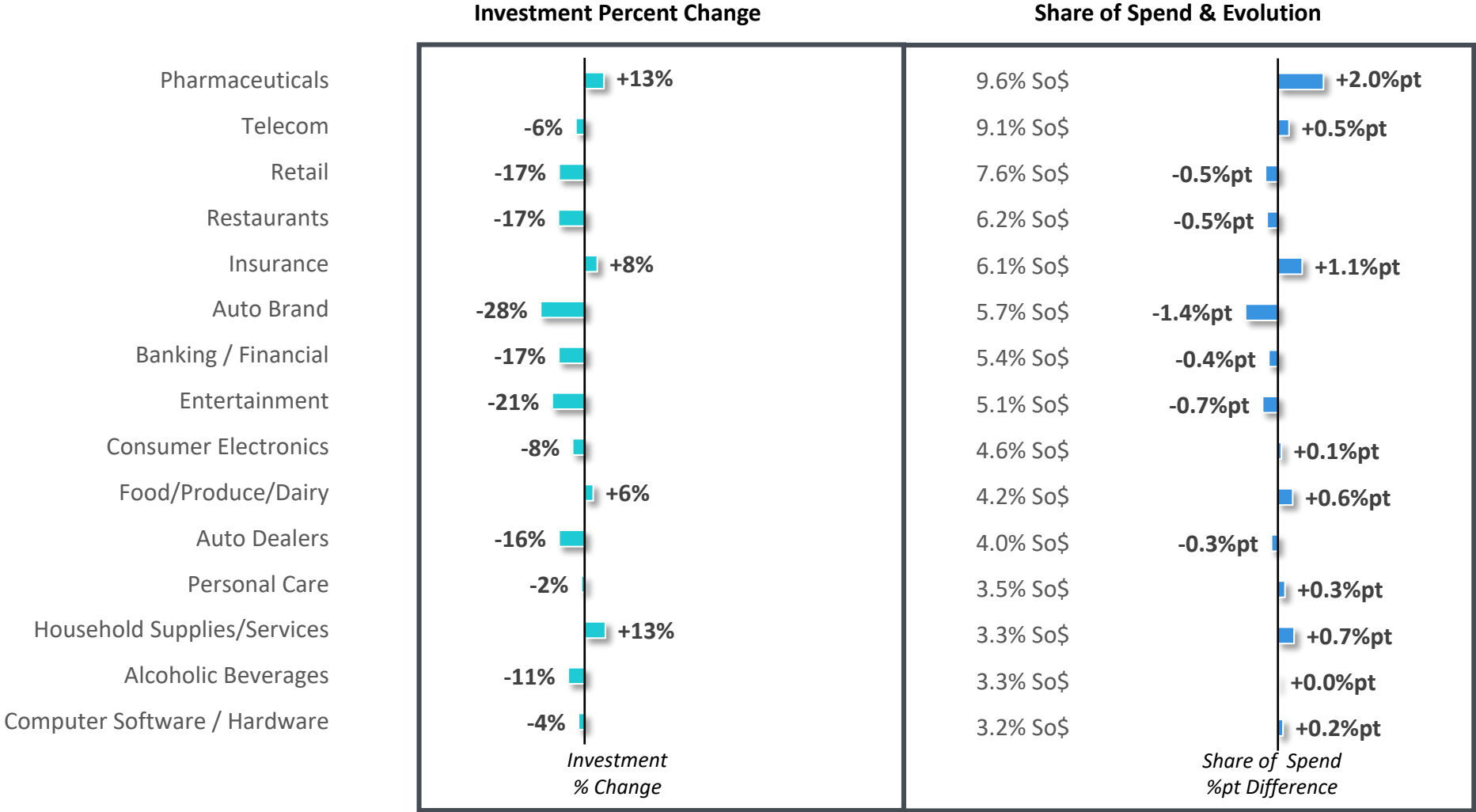
Anglo Markets – Digital Media Subtypes
Oct 2019 – Sep 2020 vs. Oct 2018 – Sep 2019
Investment Percent Change by Quarter



PRESCRIPTION
DRUGS SHIFT
FROM THE #3 TO
THE #1
CATEGORY

AUTO BRANDS
LOSE THE MOST
SHARE WITH A
STEEP -28%
TREND

Anglo Markets – Top 15 Categories
Oct 2019 – Sep 2020 vs. Oct 2018 – Sep 2019



Source: SMI Pool | Markets include USA, UK, Canada, Australia, New Zealand
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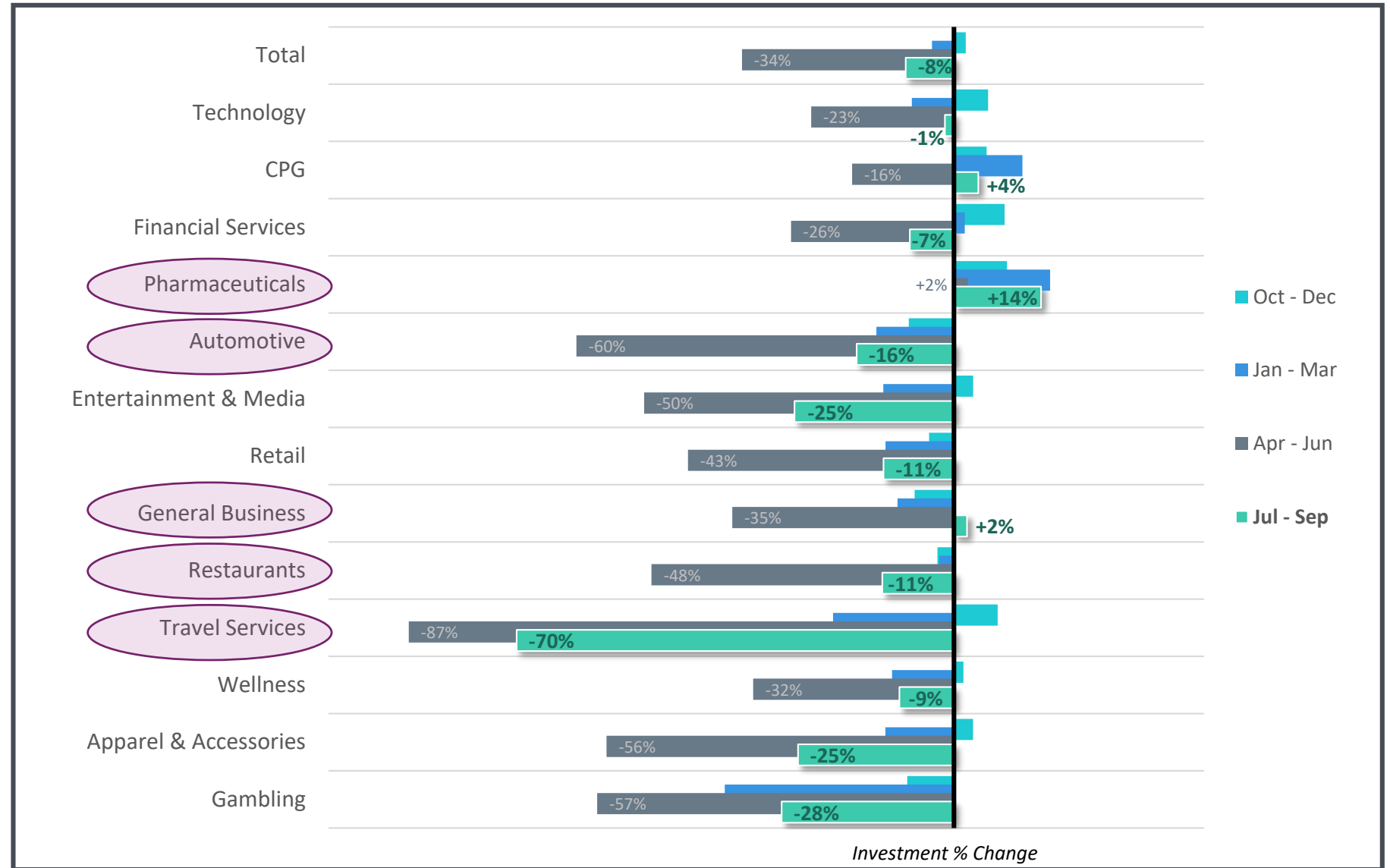
*Top based on Oct 19 – Sep 20 investment

ONLY PHARMA
 AVOIDED THE APR –
 JUN DOLDRUMS
 WITH +2% GROWTH.

AUTO, GENERAL
 BUSINESS, AND
 RESTAURANTS’
 VARIANCE MARKEDLY
 IMPROVED IN JUL –
 SEP VS APR – JUN.






TRAVEL REMAINS
 INHERENTLY
 CHALLENGED IN THE
 COVID-19 CLIMATE.

Anglo Markets – All Category Groups
 Oct 2019 – Sep 2020 vs. Oct 2018 – Sep 2019
 Investment Percent Change by Quarter








HOUSEHOLD SUPPLIES PERFORM BEST MOST FREQUENTLY ACROSS ANGLO MARKETS - MEANWHILE AUTO, TRAVEL, AND RETAIL ARE CHALLENGED.

Anglo Markets - All Media Investment
Top Investment & Divestment Categories
Oct 2019 – Sep 2020 vs. Oct 2018 – Sep 2019

Anglo Markets Total					
Category Wins	Category Wins	Category Wins	Category Wins	Category Wins	Category Wins
Pharmaceuticals +13%	Pharmaceuticals +13%	Telecom / Communications +23%	Health Care +26%	Personal Care +9%	Government +35%
Insurance +8%	Insurance +11%	Consumer Electronics +12%	Computer Soft / Hardware +9%	Computer Soft / Hardware +24%	Household Supplies/Services +18%
Household Supplies/Services +13%	Household Supplies/Services +15%	Business Services +14%	Household Supplies/Services +11%	Pharmaceuticals +22%	Food/Produce/Dairy +3%
Category Losses	Category Losses	Category Losses	Category Losses	Category Losses	Category Losses
Auto Brand -28%	Auto Brand -29%	Retail -23%	Auto Brand -34%	Auto Brand -34%	Travel / Tourism -51%
Travel / Tourism -42%	Retail -16%	Travel / Tourism -37%	Travel / Tourism -49%	Travel / Tourism -45%	Auto Brand -31%
Retail -17%	Restaurants -16%	Banking / Financial -27%	Retail -15%	Auto Dealers -20%	Retail -10%

NEW TOP MOVERS IN THE MOST RECENT QUARTER INCLUDE ALCOHOLIC BEVERAGES (US / CAN) & CONSUMER ELECTRONICS (US / NZ), INDICATING MORE DISCRETIONARY SPENDING VIA NON-ESSENTIAL CATEGORIES

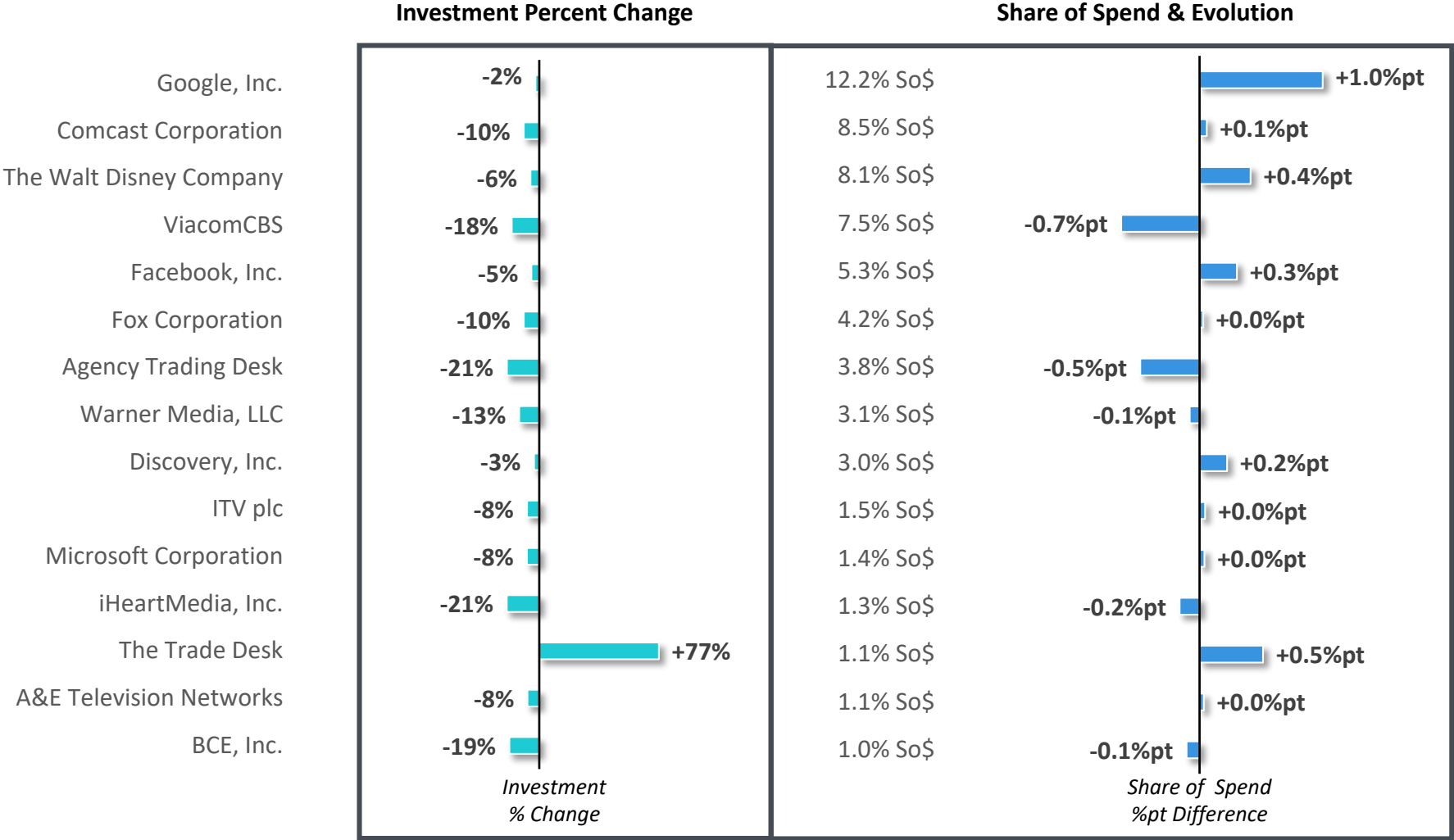
Anglo Markets - All Media Investment Top Investment & Divestment Categories Jul – Sep 2020 vs 2019

Anglo Markets Total					
Category Wins	Category Wins	Category Wins	Category Wins	Category Wins	Category Wins
Pharmaceuticals +18%	Pharmaceuticals +19%	Telecom / Communications +36%	Health Care +109%	Household Supplies/Services +146%	Government +59%
Consumer Electronics +16%	Consumer Electronics +21%	Household Supplies/Services +18%	Government +26%	Computer Soft / Hardware +57%	Personal Care +19%
Government +71%	Alcoholic Beverages +22%	Health Care +137%	Computer Soft / Hardware +17%	Alcoholic Beverages +28%	Consumer Electronics +18%
Category Losses	Category Losses	Category Losses	Category Losses	Category Losses	Category Losses
Travel / Tourism -70%	Travel / Tourism -68%	Retail -40%	Auto Brand -45%	Auto Dealers -27%	Travel / Tourism -80%
Auto Brand -20%	Media -29%	Travel / Tourism -65%	Travel / Tourism -81%	Entertainment -43%	Retail -19%
Media -33%	Banking / Financial -20%	Computer Soft / Hardware -45%	Entertainment -62%	Travel / Tourism -73%	Auto Brand -45%

GOOGLE’S
REVENUE DECLINE
WAS FLATTER THAN
OTHER TOP
COUNTERPARTS,
ALLOWING THE
MOST SHARE
IMPROVEMENT.

SEARCH HAS BEEN
A CORE PANDEMIC
TOUCHPOINT.

Anglo Markets – Top 15 Master Owners
Oct 2019 – Sep 2020 vs. Oct 2018 – Sep 2019



Source: SMI Pool | Markets include USA, UK, Canada, Australia, New Zealand
Media formats include TV, Magazines, Newspapers, OOH/Cinema, Radio, and Digital
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*Top based on Oct 19 – Sep 20 investment, excluding “Other Master Owners” group.

TOP OWNERS
AVERAGED A -32%
REVENUE
REDUCTION IN APR –
JUN VS LAST YEAR,
WHICH IMPROVED
TO -8% IN JUL – SEP
WHEN EXCLUDING
WARNER

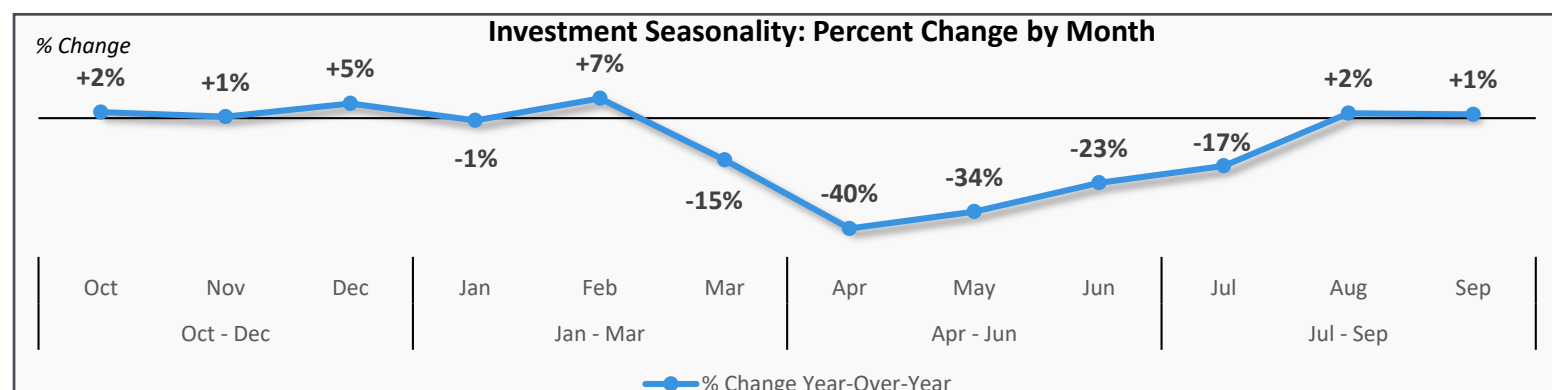
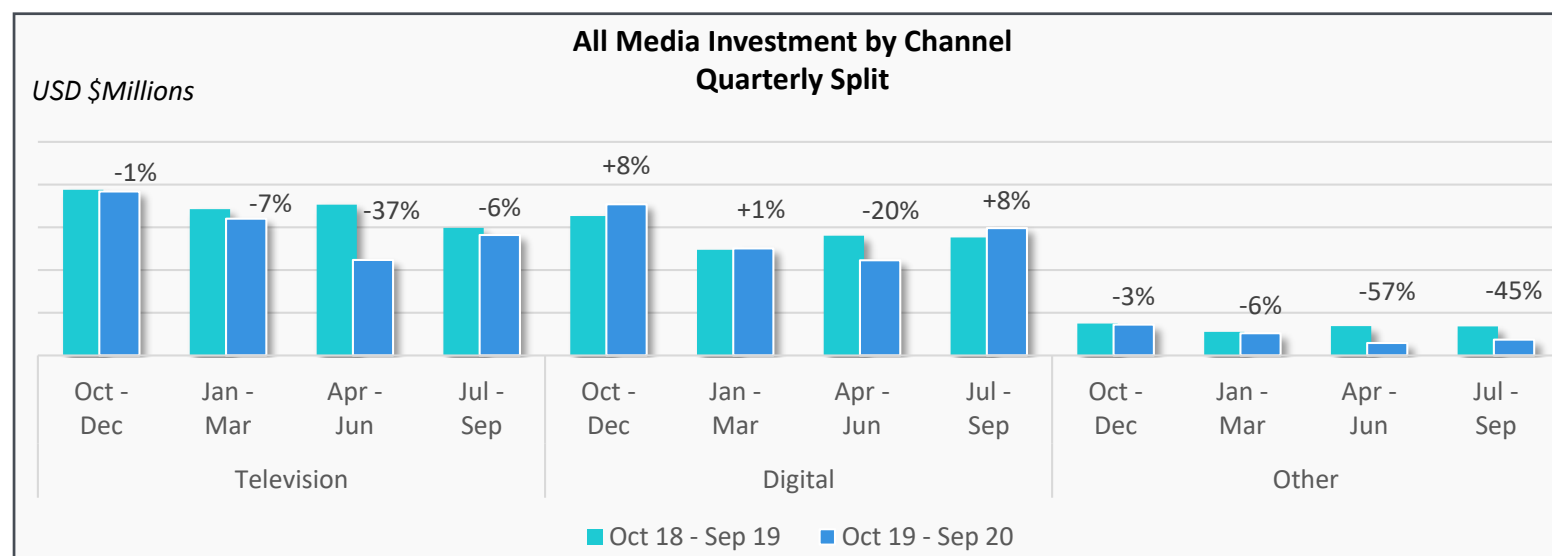
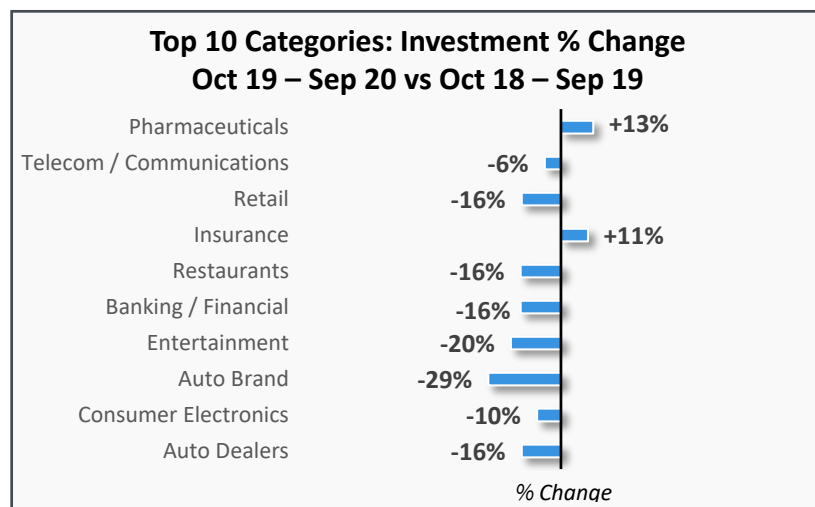
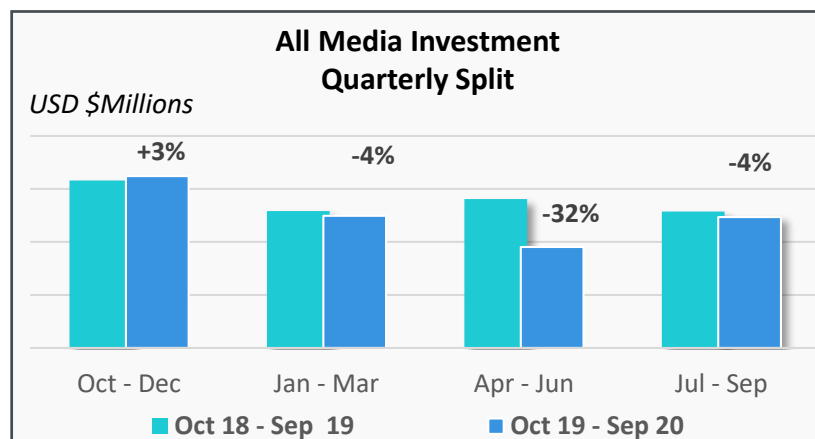
ANGLO
OUTPERFORMED
WITH +34%
GROWTH IN THE
FINAL QUARTER,
DRIVEN BY THE
DELAYED NBA
PLAYOFFS

Anglo Markets – Top 10 Master Owners
Oct 2019 – Sep 2020 vs. Oct 2018 – Sep 2019
Investment Percent Change by Quarter

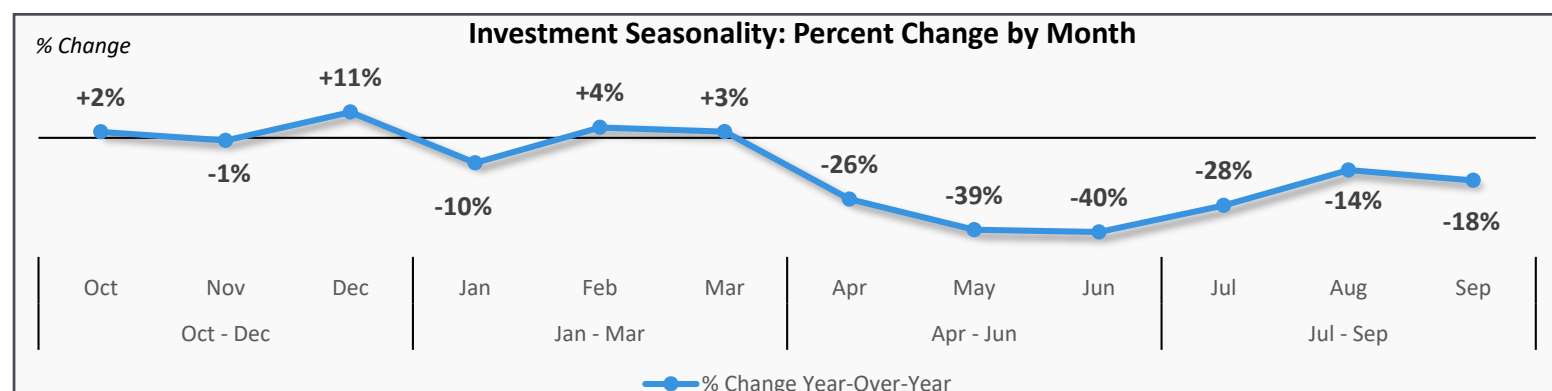
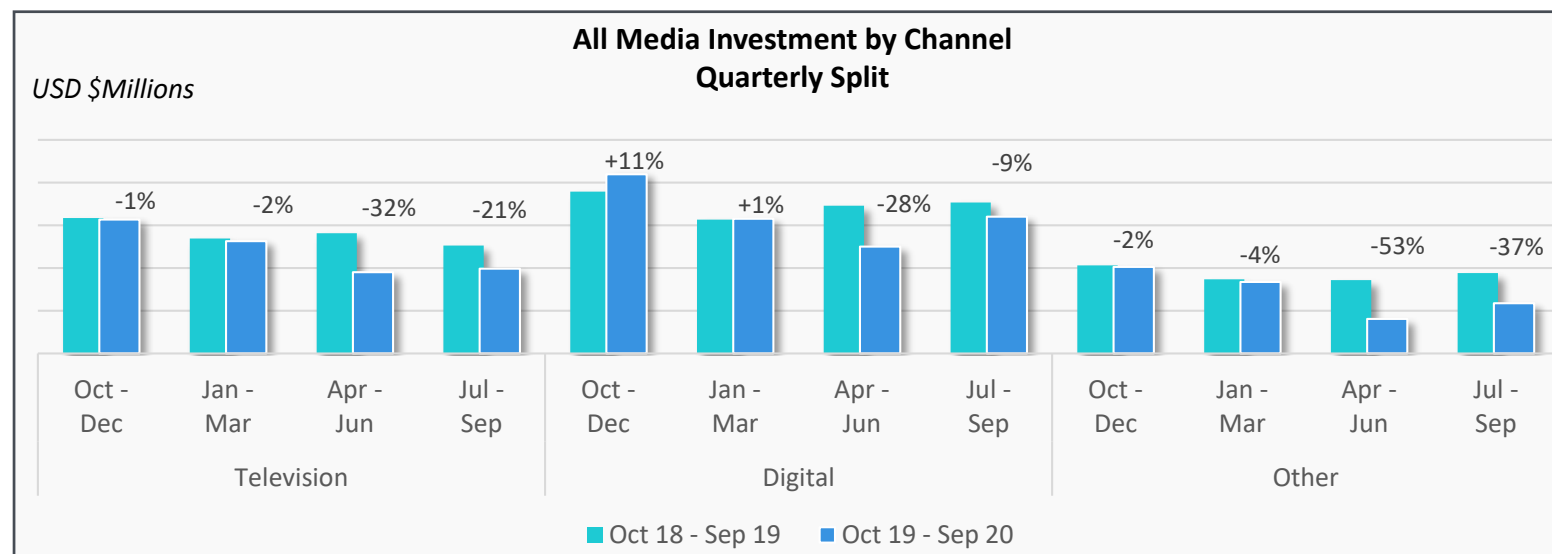
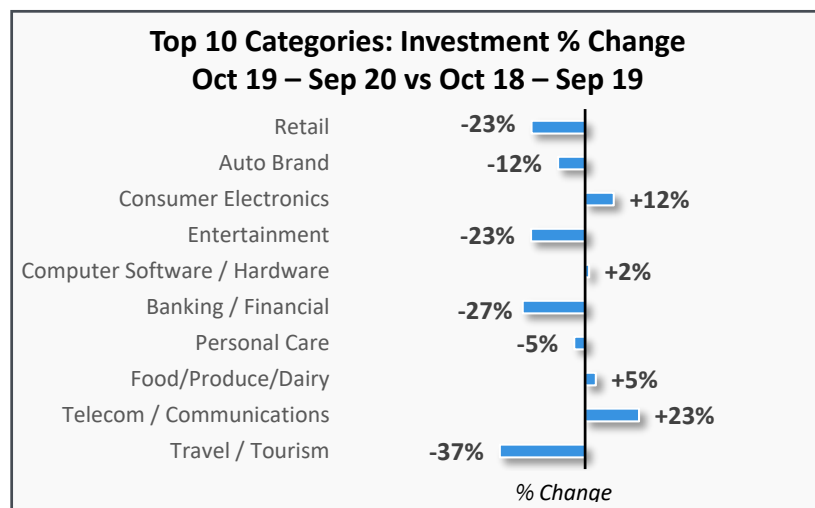
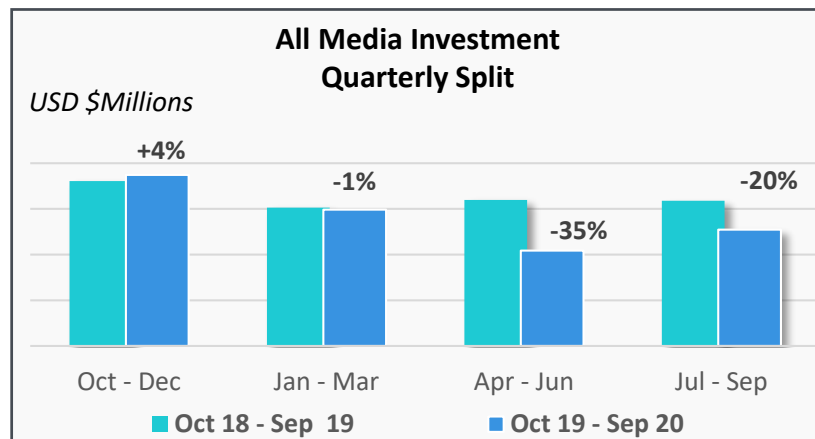


MARKET SNAPSHOTS

IN THE LAST QUARTER, GROWING DIGITAL SPEND NEWLY SURPASSED TV – THE RETURN OF SPORTS BOLSTERED MARKET PERFORMANCE



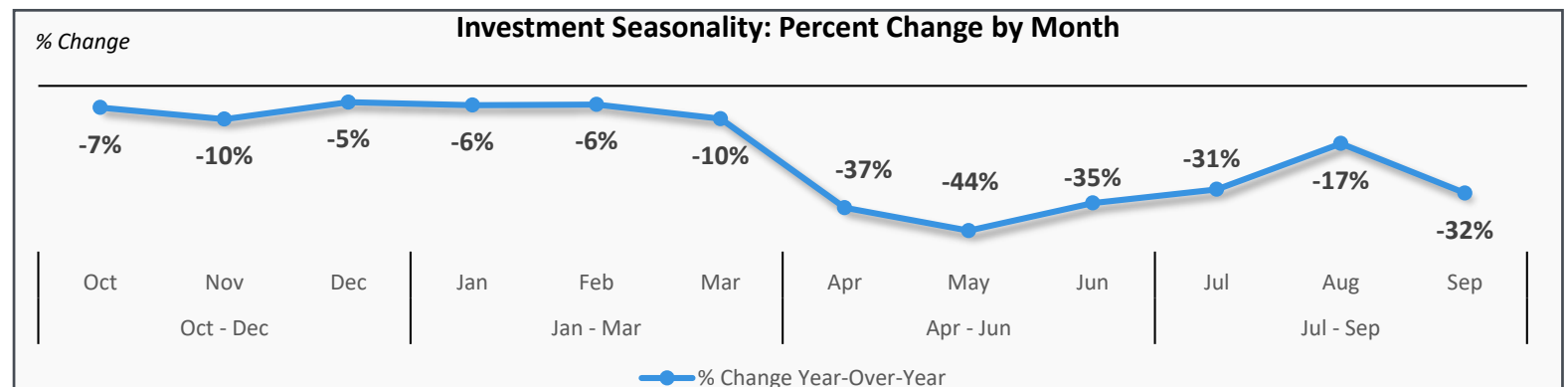
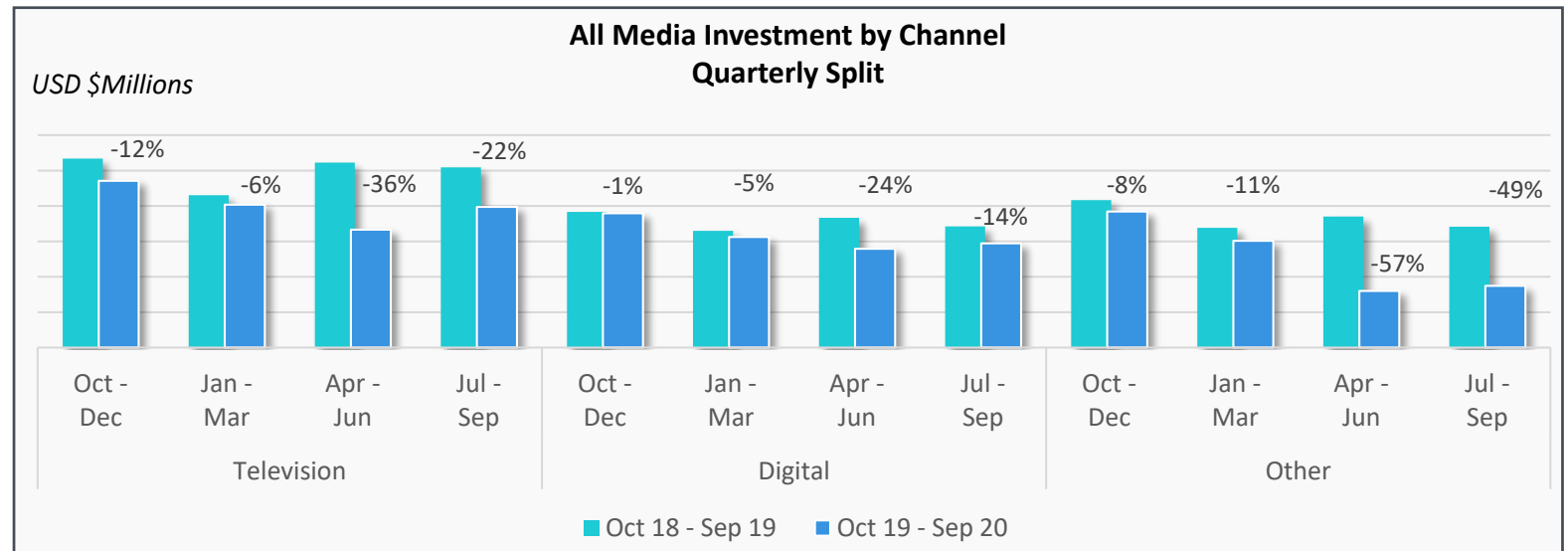
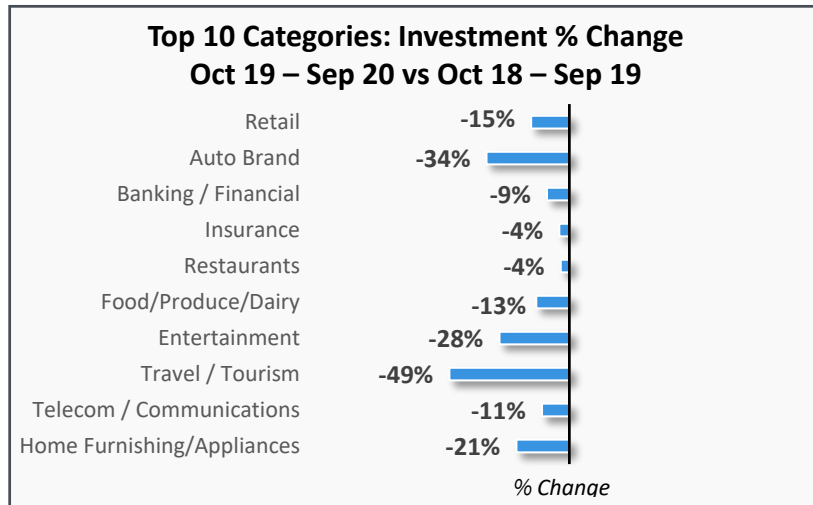
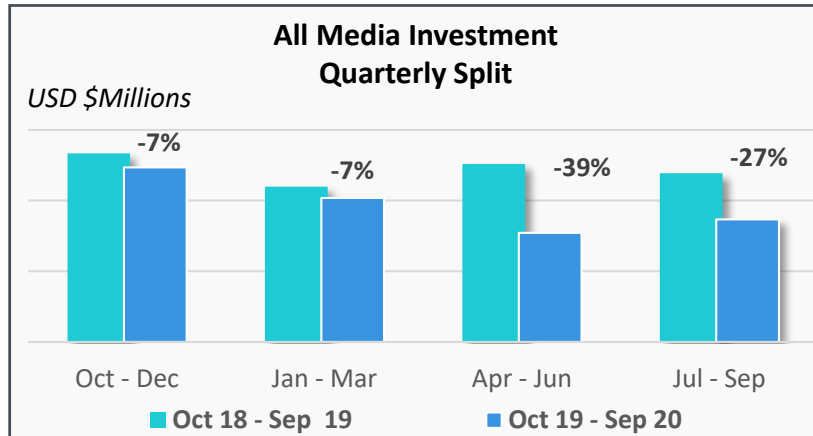
DIGITAL RETURNS TO SINGLE DIGIT VARIANCE IN THE MOST RECENT QUARTER, WHILE OFFLINE MEDIA CONTINUED TO STRUGGLE



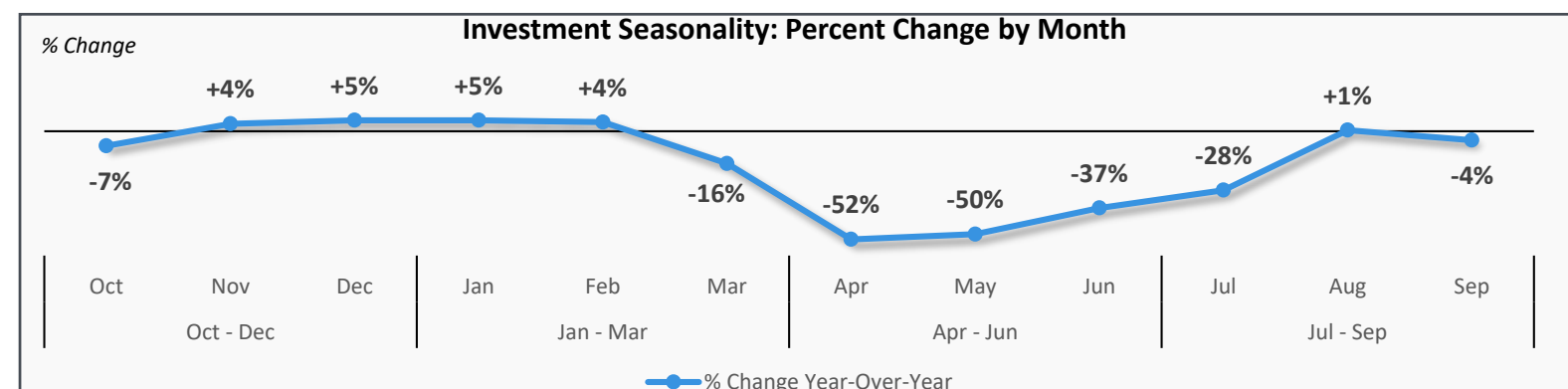
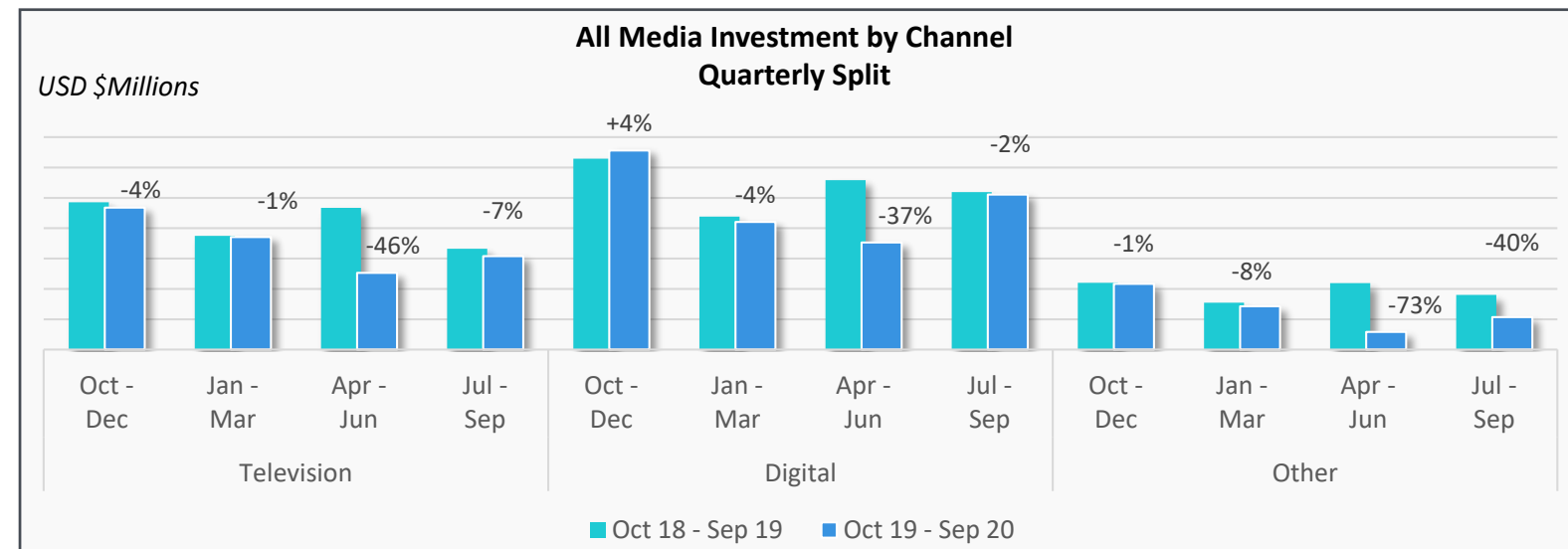
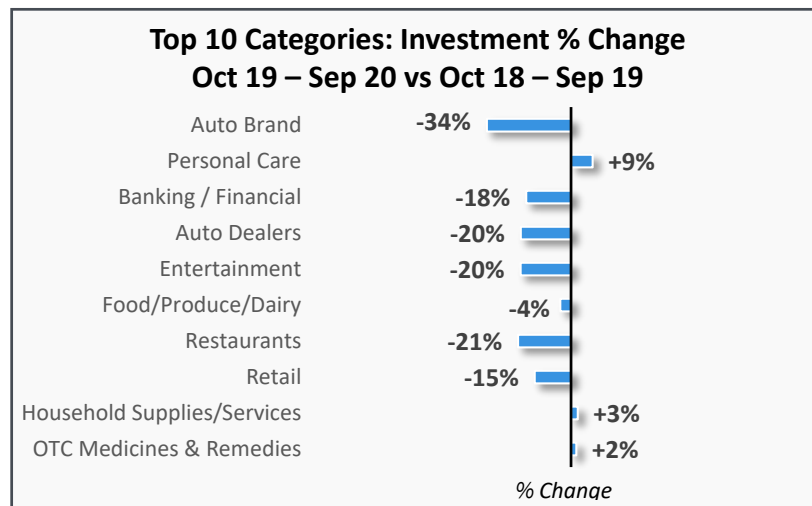
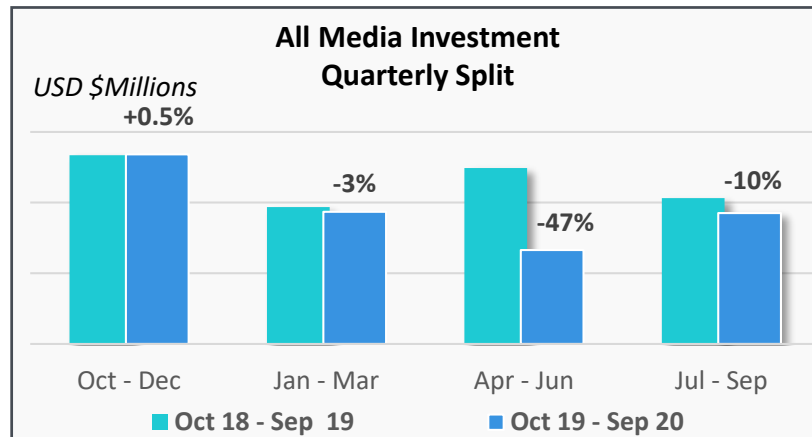
AUSTRALIA IS UNIQUE AS THE ONLY MARKET WITH UNIVERSAL DECLINES, INCLUDING PRE-PANDEMIC SEASONS, WHICH THE PANDEMIC HAS FURTHERED



AUS



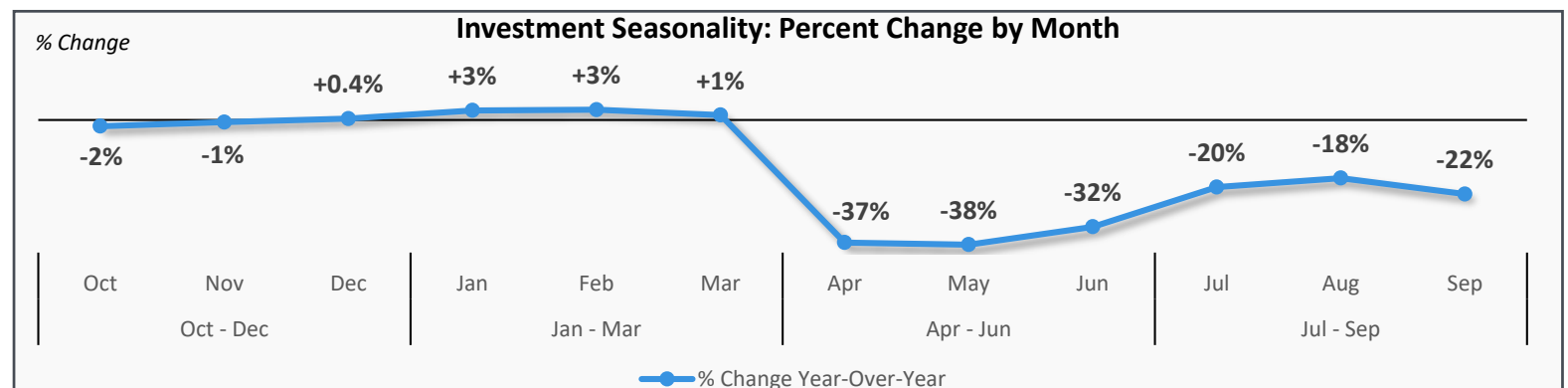
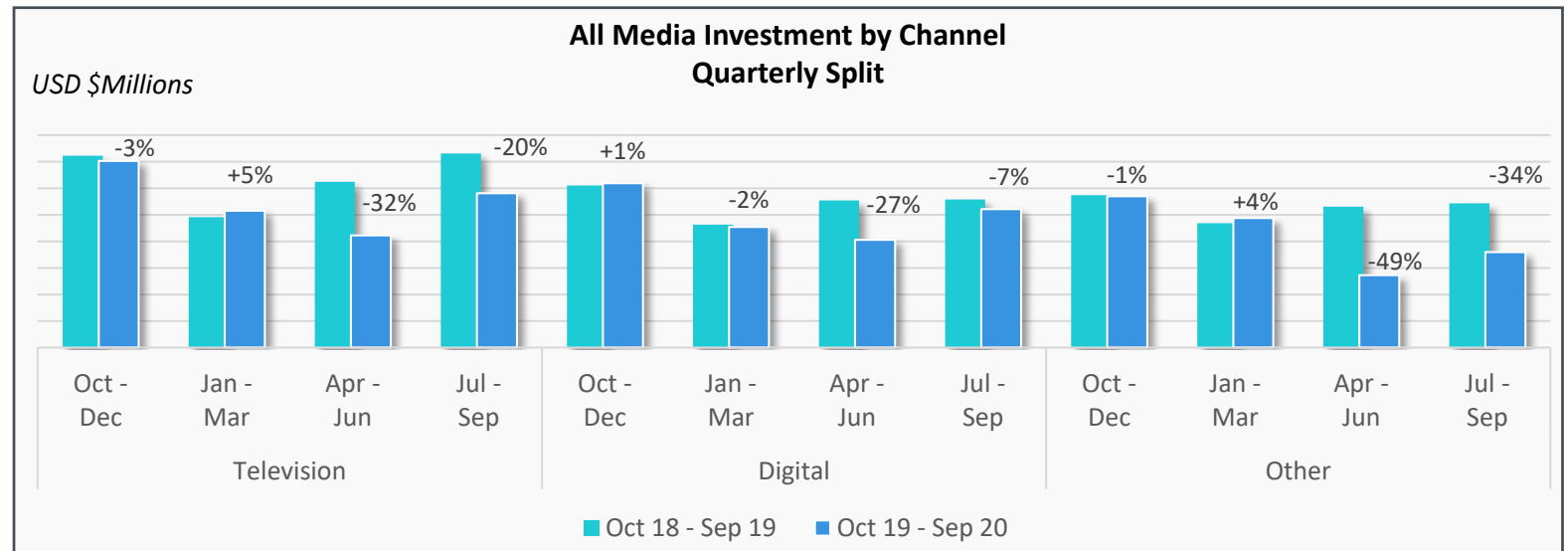
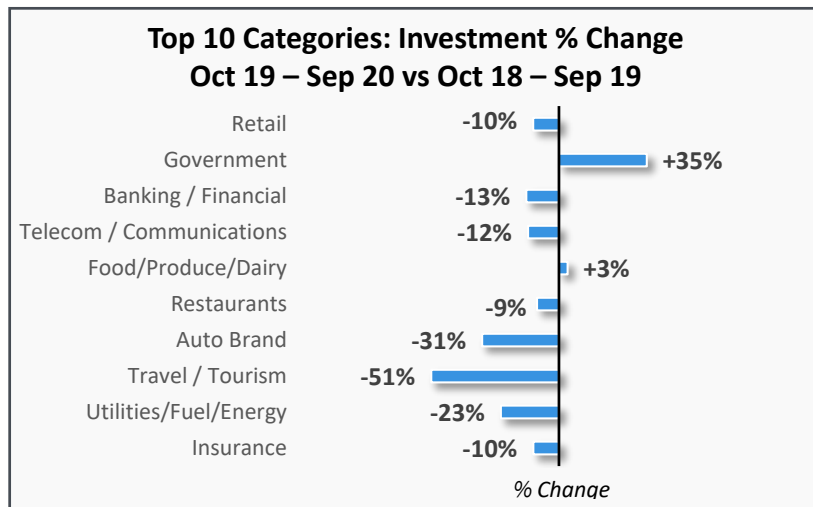
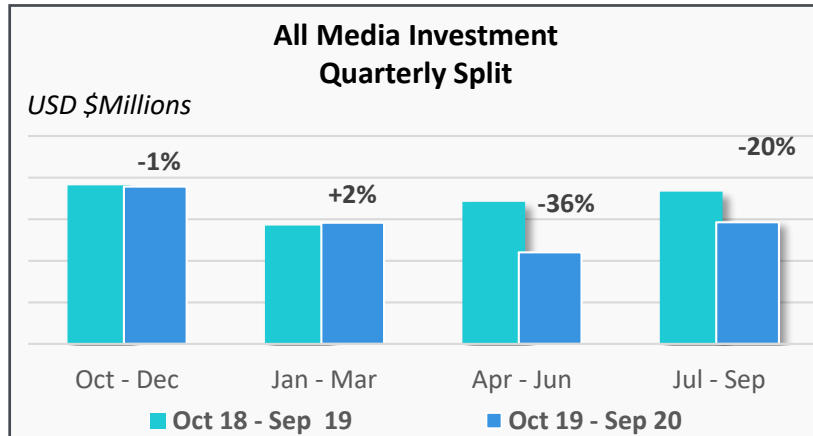
LIKE THE US, THE RETURN OF SPORTS IMPROVED CANADA PERFORMANCE IN THE MOST RECENT QUARTER AS DIGITAL & TV DECLINES REBOUND



NEW ZEALAND TRENDS IN LINE WITH THE UK IN THE JULY TO SEPTEMBER PERIOD, WITH INVESTMENT DECLINING -20% AND DIGITAL THE FIRST TO SEE SINGLE DIGIT VARIANCE SINCE THE PANDEMIC BEGAN



NZ



**Standard
Media
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