

**Standard
Media
index**

think^{tv}

FIRST EXCLUSIVE VIEW INTO TV AD SPEND IN 2021

January 26, 2022

STANDARD MEDIA INDEX OVERVIEW



Global partnership model with major holding company agencies and leading independents. HQ'd in NYC since 2011, Canada launch in 2020.



Clean and harmonize client level data for faster and better reporting, insights, trends, and forward-pacing.

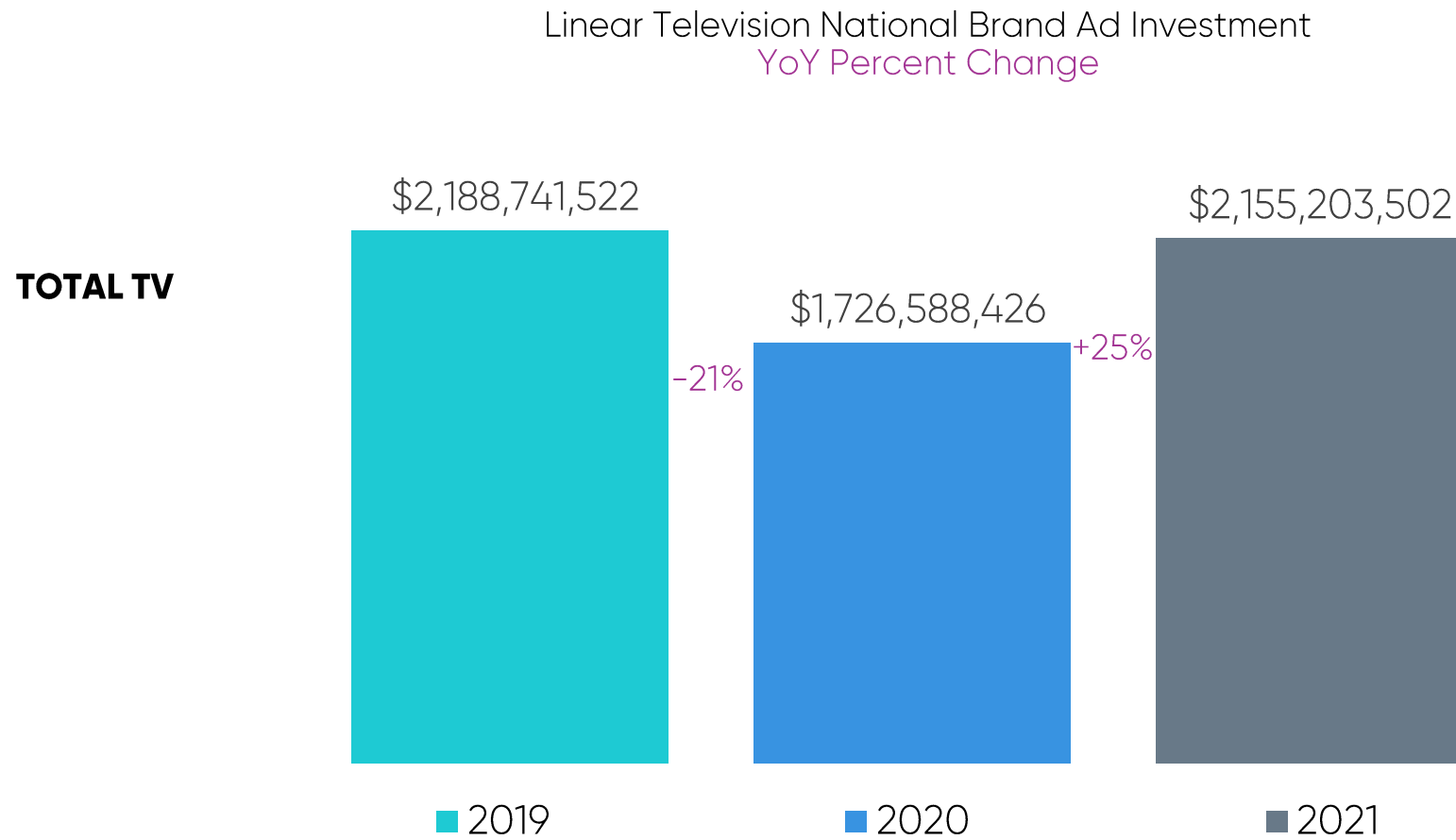


Produce category, spend and cost level insights which then becomes SMI data products. Clients include publishers, finance, consulting, brands and tech.

STANDARD MEDIA INDEX REPORTING



LINEAR TV REBOUNDS STRONG



STILL FACING YOY DECLINES IN Q1, TV CAME BACK STRONG IN Q2 AND CONTINUED TO SEE YOY GROWTH IN Q3 AND Q4, FINISHING 2021 UP +25% VS LY AND ONLY DOWN -1% VS 2019

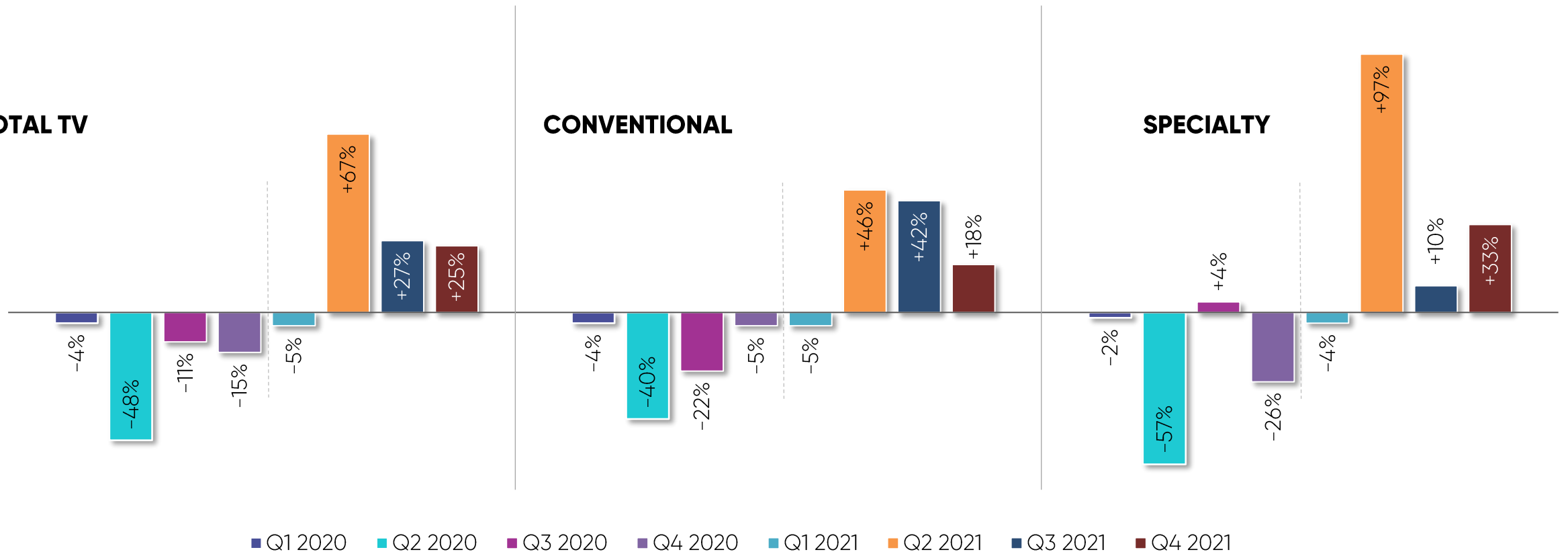
Linear Television National Brand Ad Investment
Quarterly YoY Percent Change

% Change
YOY

TOTAL TV

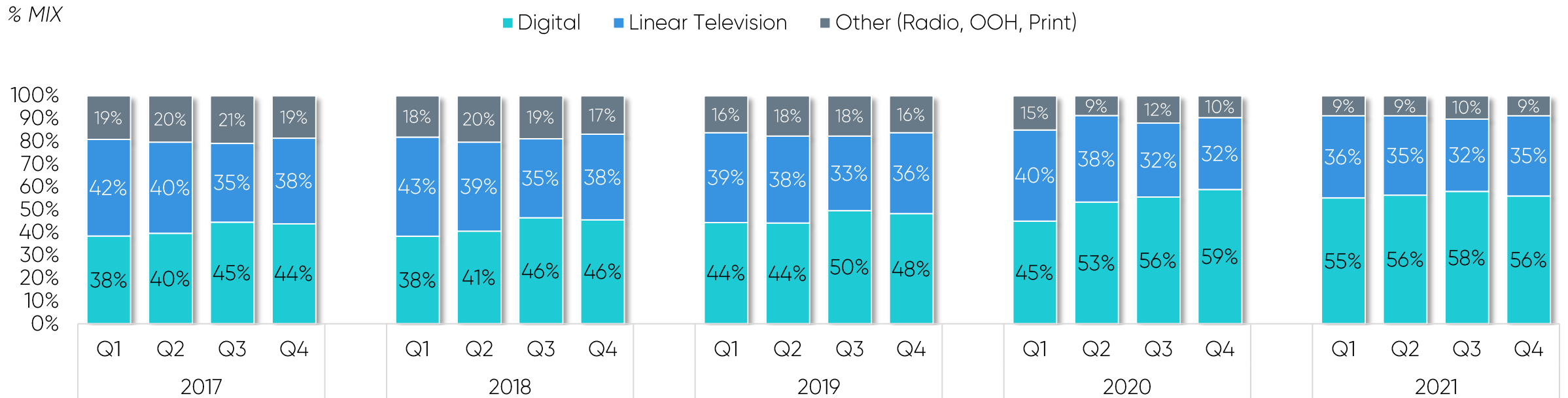
CONVENTIONAL

SPECIALTY

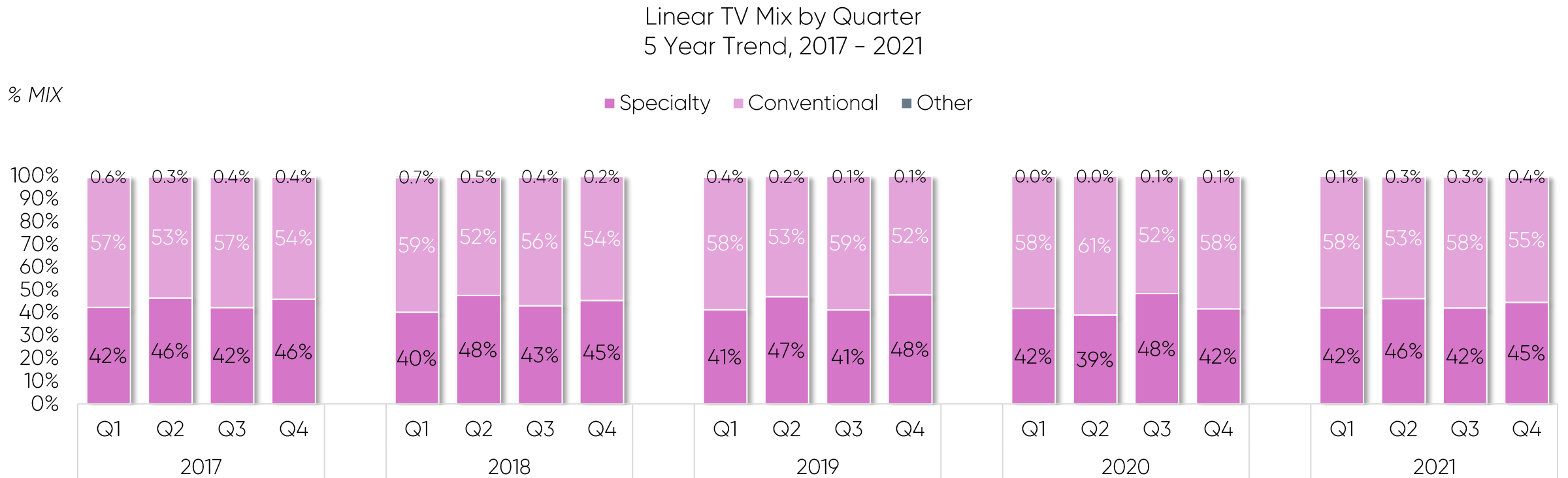


LINEAR TELEVISION SHARE IS STABLE AND GROWTH TO DIGITAL IS MAINLY COMING FROM OTHER MEDIA TYPES

Cross-Media Mix by Quarter
5 Year Trend, 2017 - 2021

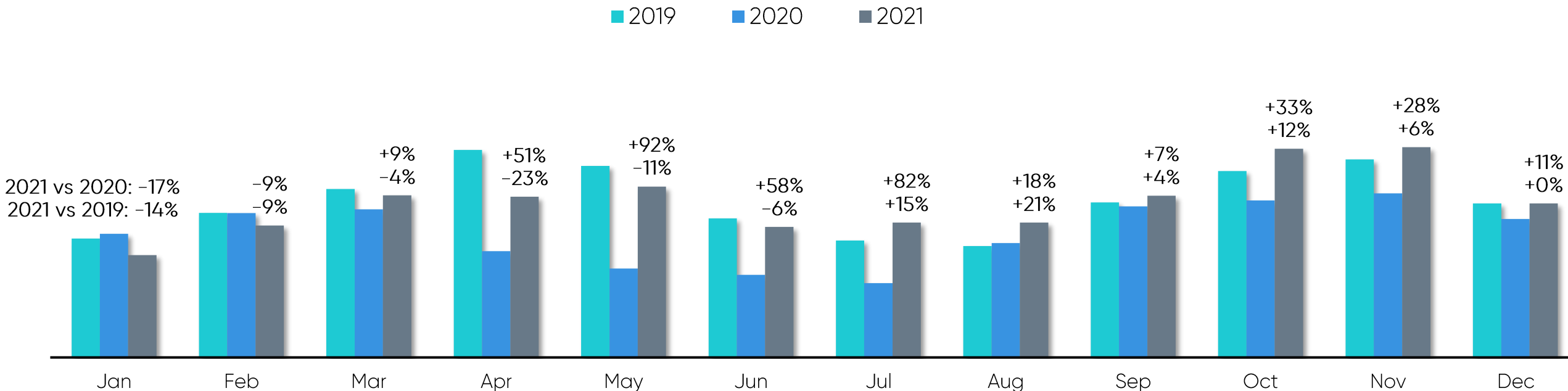


ALTHOUGH CONVENTIONAL HOLDS THE MAJORITY OF OVERALL TV INVESTMENT, SPECIALTY INVESTMENT SHARE IS STABLE



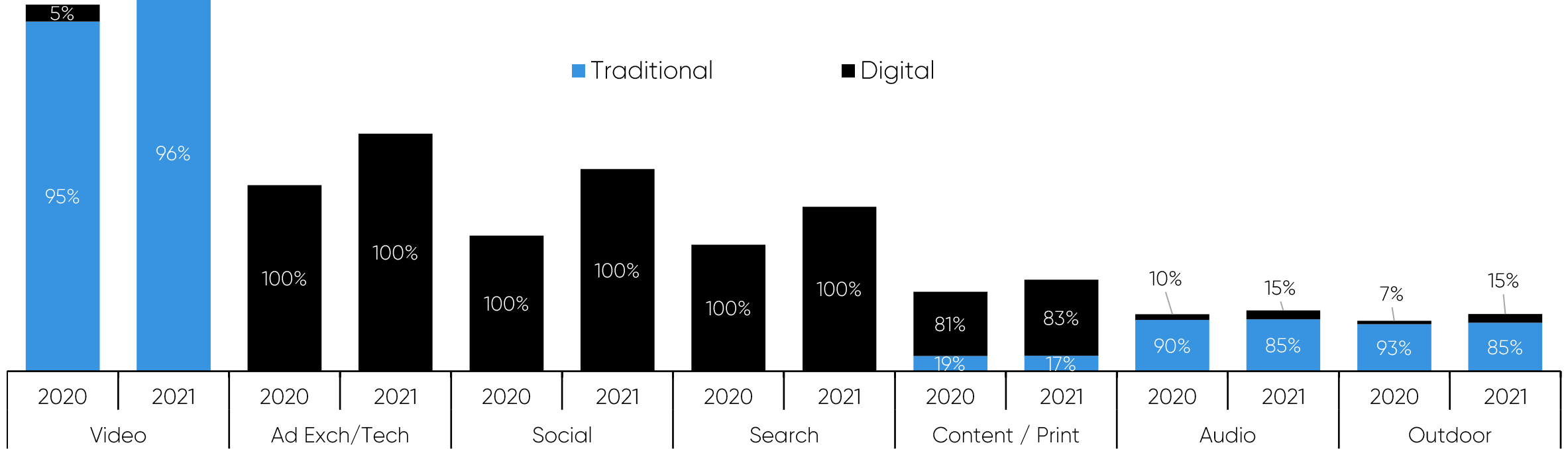
TV SAW TEN CONSECUTIVE MONTHS OF GROWTH VS LY, AND SIX CONSECUTIVE MONTHS OF GROWTH VS 2019, WITH DECEMBER FINISHING FLAT TO PRE-PANDEMIC DECEMBER 2019

Television Investment Seasonality
3-Year Trend (2019, 2020, 2021)





VIDEO INVESTMENT IS LARGELY LINEAR BUT IS SEEING VOLUME GROWTH, DESPITE DIGITAL SHARE REMAINING FLAT

Media Type Spend
Split by Content Type and Digital / Traditional
Full Year (Jan-Dec) 2021 vs 2020



THE BIGGEST LINEAR TELEVISION MEDIA OWNERS SAW VOLUME GROWTH VS 2020 AS DID THE INDEPENDENTS AND LONG-TAIL, SMALLER PLAYERS

Top TV Media Owner Investment Growth
2H (Jul-Dec) 2021 vs 2020

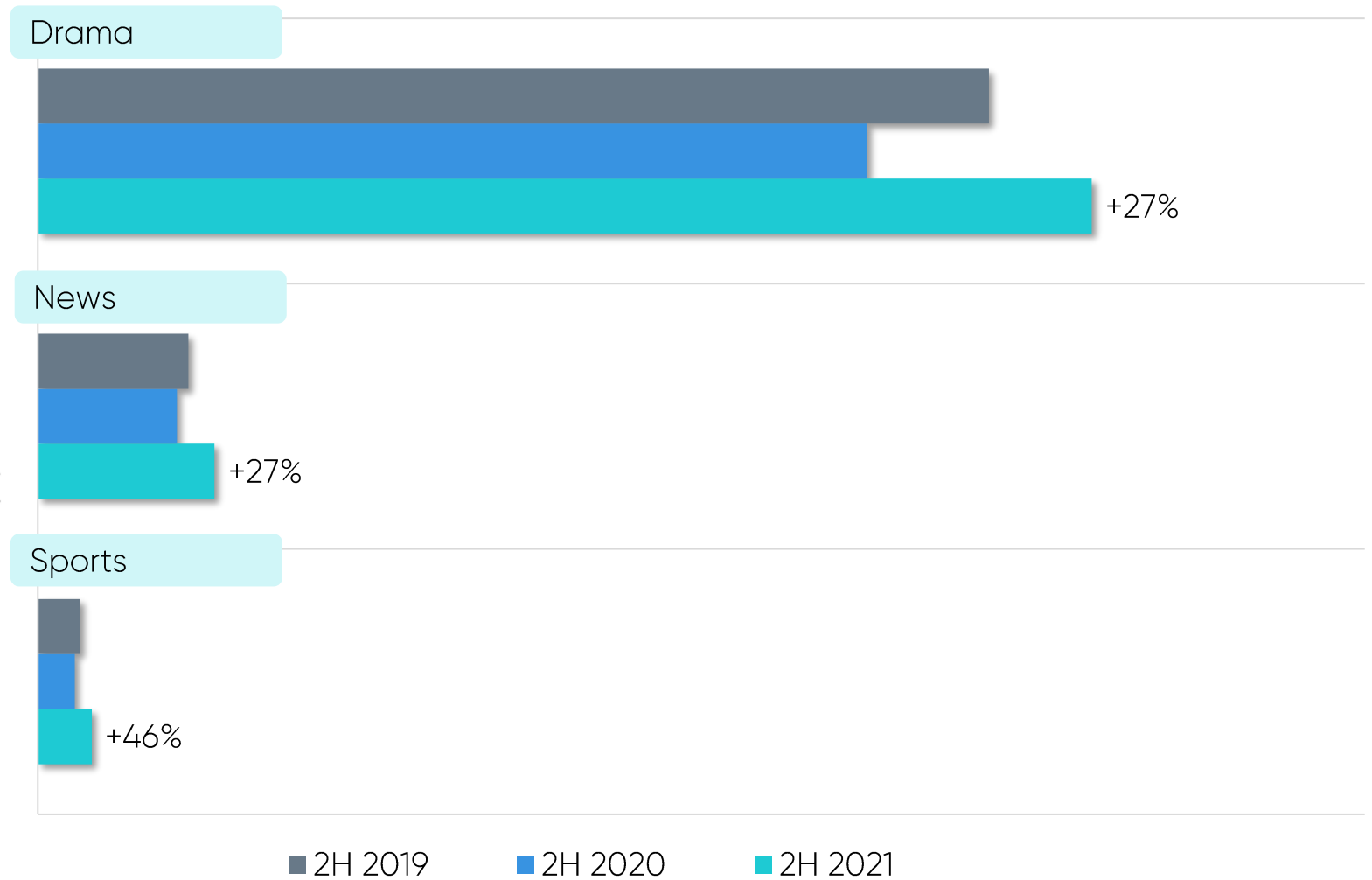
	<p>Top 5 TV Media Owners</p>	<p>+25% Volume Investment Growth vs 2020</p>
	<p>Top 5 Independent TV Media Owners</p>	<p>+45% Volume Investment Growth vs 2020</p>
<p>All Other TV Media Owners</p>		<p>+26% Volume Investment Growth vs 2020</p>

THE TOP
CONVENTIONAL
CHANNELS ALL
SAW VOLUME
GROWTH VS
BOTH 2020 AND
2019



Linear TV Top 5 Conventional Channels – by Genre
Volume Percent Change, 2H 2021 vs 2020 & 2019

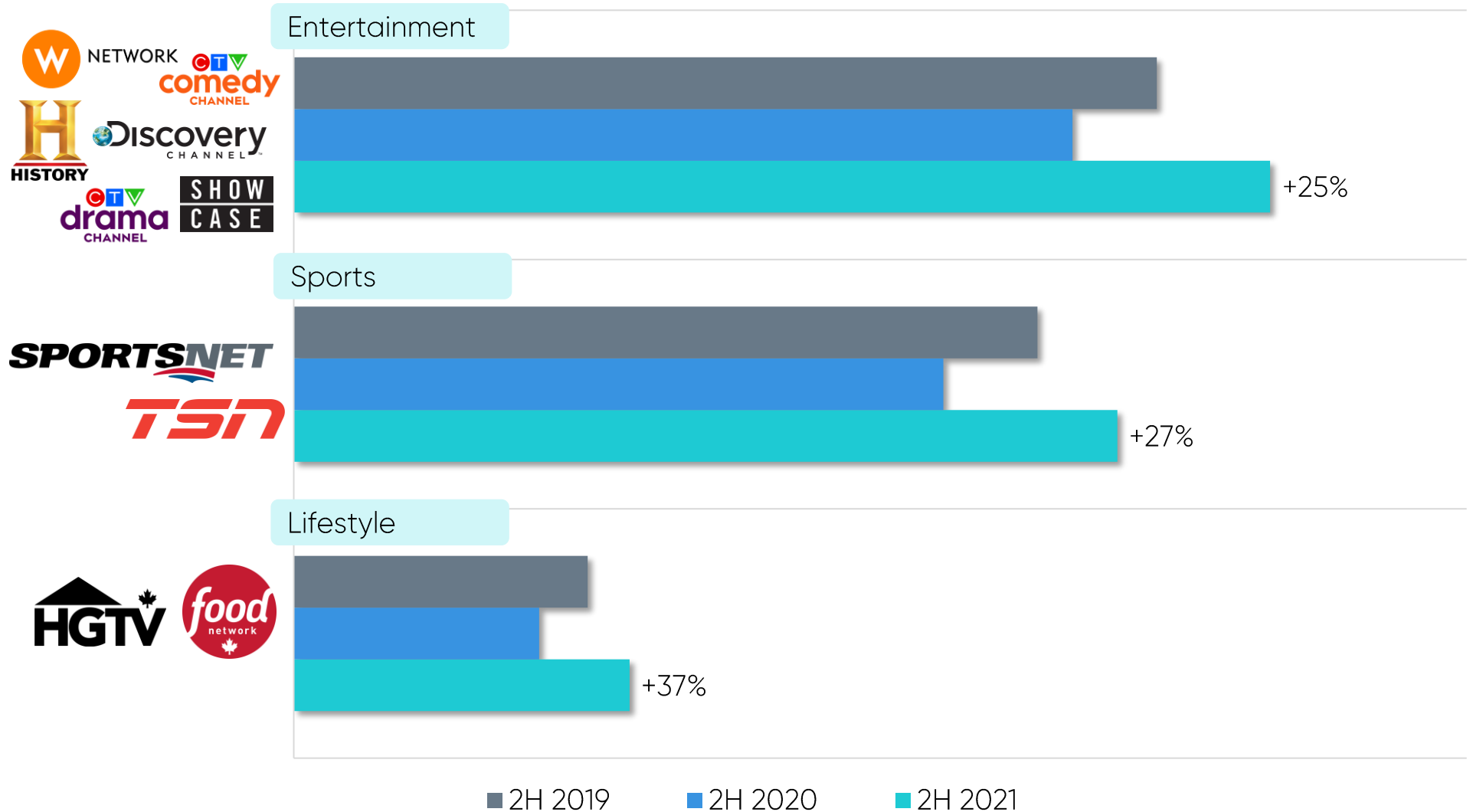
% CHG VS 2020



THE TOP SPECIALTY CHANNELS ALL SAW VOLUME GROWTH VS 2020 AND MOST SAW GROWTH VS 2019

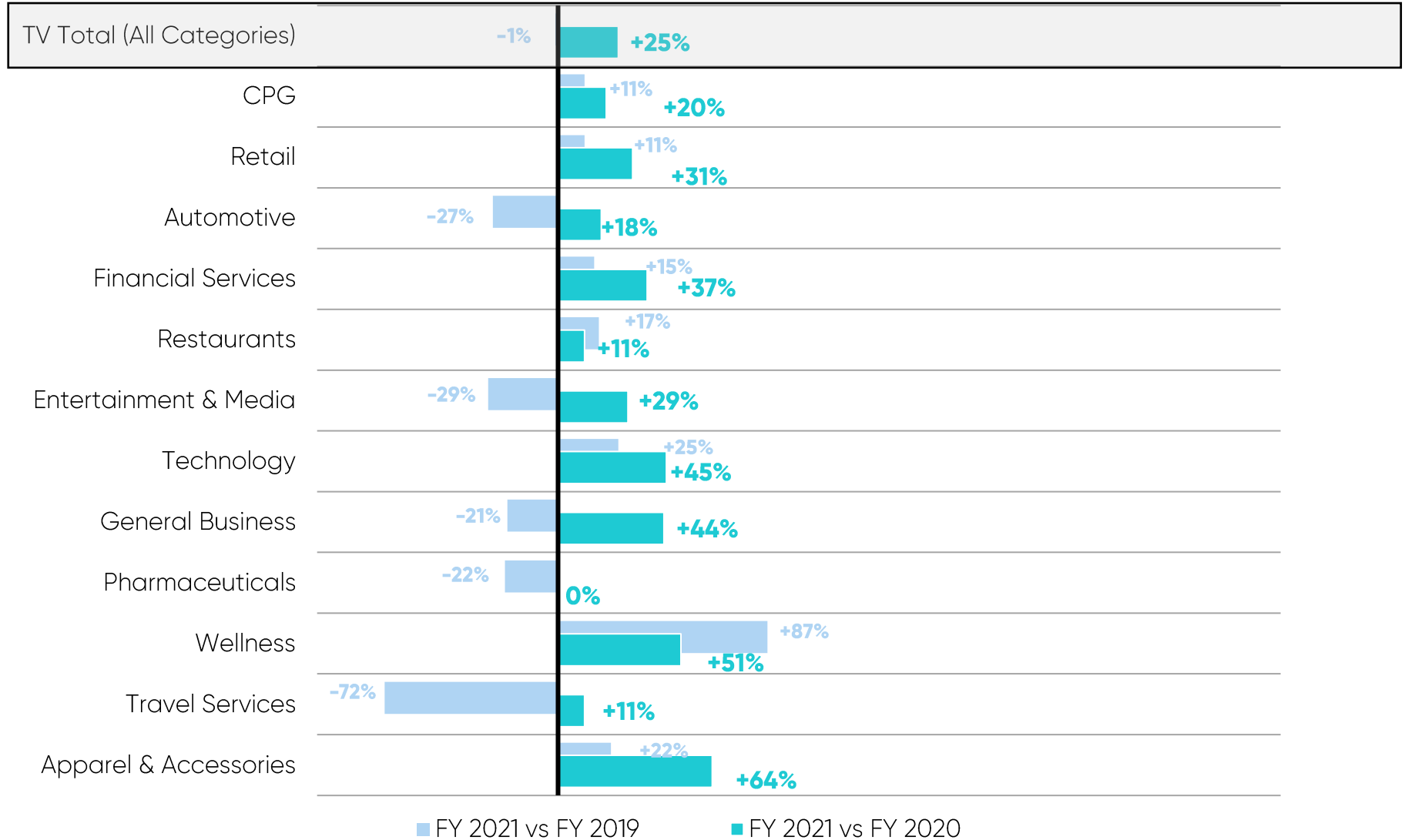
Linear TV Top 10 Specialty Channels – by Genre
Volume Percent Change, 2H 2021 vs 2020 & 2019

% CHG VS 2020



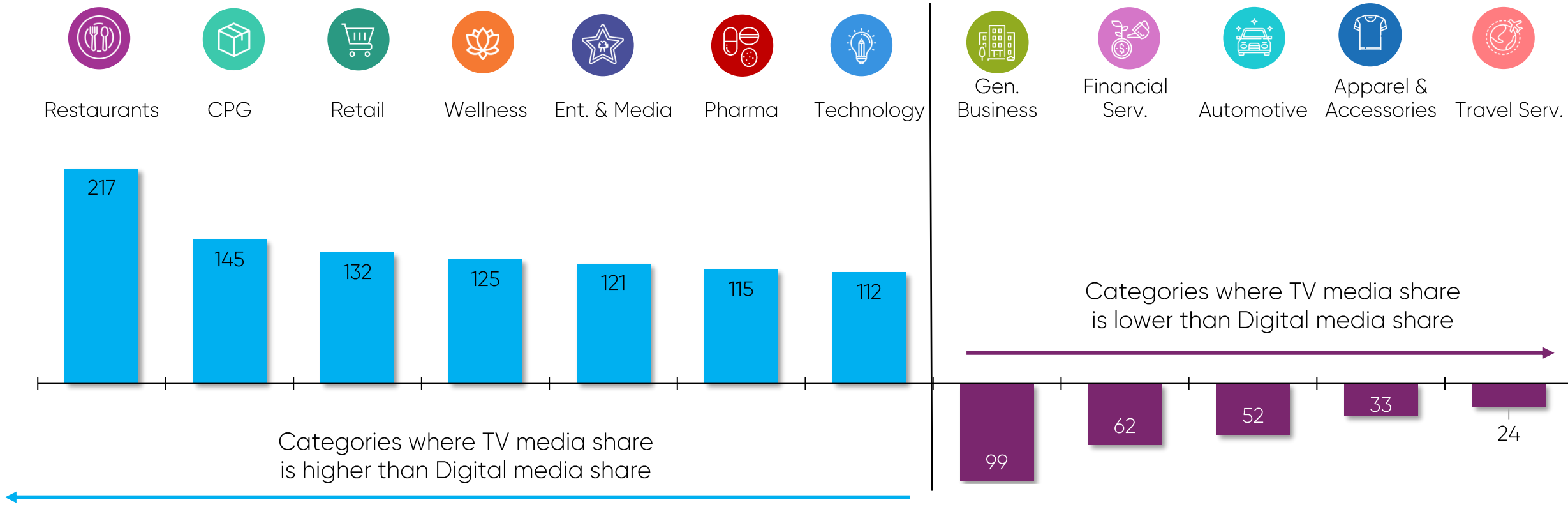
AUTOMOTIVE,
ENTERTAINMENT
& MEDIA,
GENERAL
BUSINESS,
PHARMA, AND
TRAVEL AMONG
CATEGORY
GROUPS THAT
DID NOT MEET
2019 LEVELS
WITHIN THE
LINEAR TV SPACE

Television National Brand Ad Spend, by Product Category Group
Volume Percent Change, Full Year (Jan-Dec) 2021 vs 2020 & 2019



WHICH CATEGORIES ARE LEANING INTO TV WITHIN THEIR MEDIA MIX?

Product Category Group Index
Linear TV vs Digital Media – 2H (Jul-Dec) 2021



PHARMA IS THE ONLY CATEGORY GROUP SPENDING LESS ON CONVENTIONAL AND SPECIALTY IN 2021 VS PY, AUTOMOTIVE PRESENTS AN OPPORTUNITY WITHIN SPECIALTY

Conventional

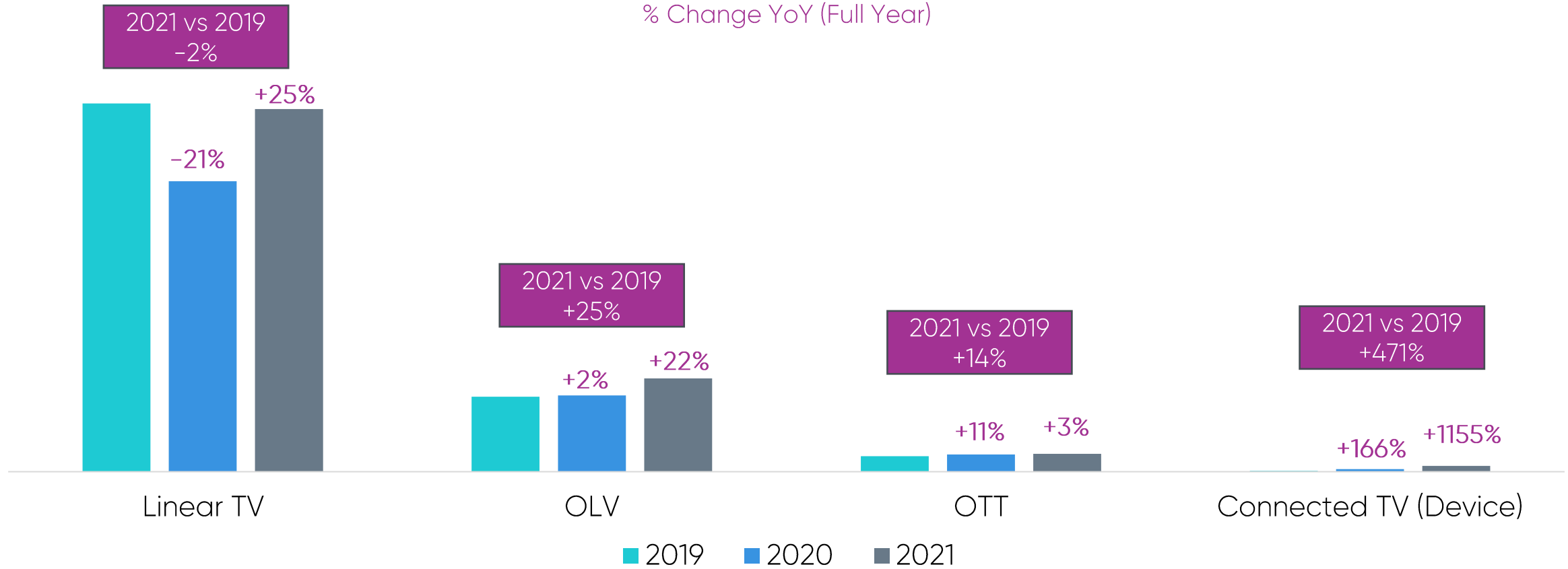
Product Category Group	Index to PY	
	2H 2020	2H 2021
CPG	105	115
Retail	98	122
Automotive	75	103
Financial Services	113	139
Restaurants	97	119
Entertainment & Media	43	236
Technology	74	163
General Business	57	172
Pharmaceuticals	83	93
Wellness	142	105
Travel Services	15	362
Apparel & Accessories	105	131

Specialty

Product Category Group	Index to PY	
	2H 2020	2H 2021
CPG	101	132
Entertainment & Media	53	150
Retail	101	109
Automotive	76	80
Financial Services	88	154
Restaurants	116	121
Technology	126	110
General Business	50	168
Pharmaceuticals	79	83
Wellness	86	194
Travel Services	15	283
Apparel & Accessories	112	142

DIGITAL VIDEO PLATFORMS CONTINUE TO GROW AT HIGH RATES, BUT FAR FROM CAPTURING THE SCALE OF LINEAR TV

Video Spend Volume on different Video Platforms
% Change YoY (Full Year)



Standard Media index



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