

**Standard  
Media  
index**

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**ANGLO MARKET INTELLIGENCE  
JAN – MAR 2021**

MAY 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  
(98%)



CAN  
(94%)



NZ  
(99%)

## MEDIA COVERED



TV



Radio



Magazines



Newspapers



Outdoor

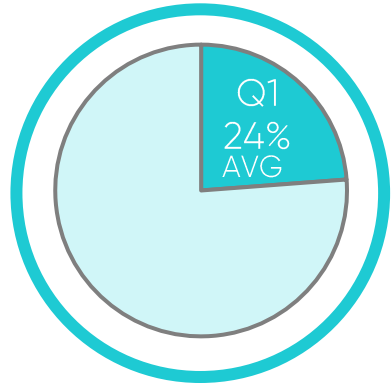


Cinema



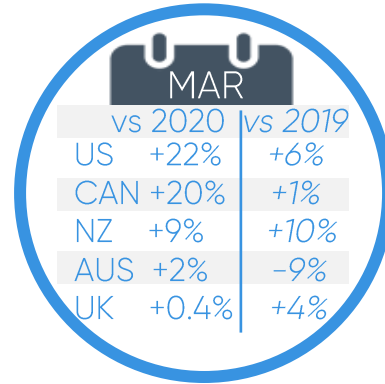
Digital

# EXECUTIVE SUMMARY



## Q1 GROWTH SHOWS PROMISE FOR 2021

In the last two years, Q1 totaled about 24% of calendar-year multimedia ad spend. If that allocation holds steady in 2021, based on current growth, the calendar year would reach +7%.



## MARCH REBOUNDS & EXPANDS

All key markets expanded ad revenue in March YOY, with all but Australia setting a three-year peak investment threshold.



## DIGITAL NEARED 50% OF THE Q1 2021 MIX

Marketers continue to follow audiences online. Digital expanded from 41% to 48% of the mix during Q1 YOY. Across markets, nearly all digital subtypes surpassed Q1 2019 & Q1 2020 ad revenue alike.



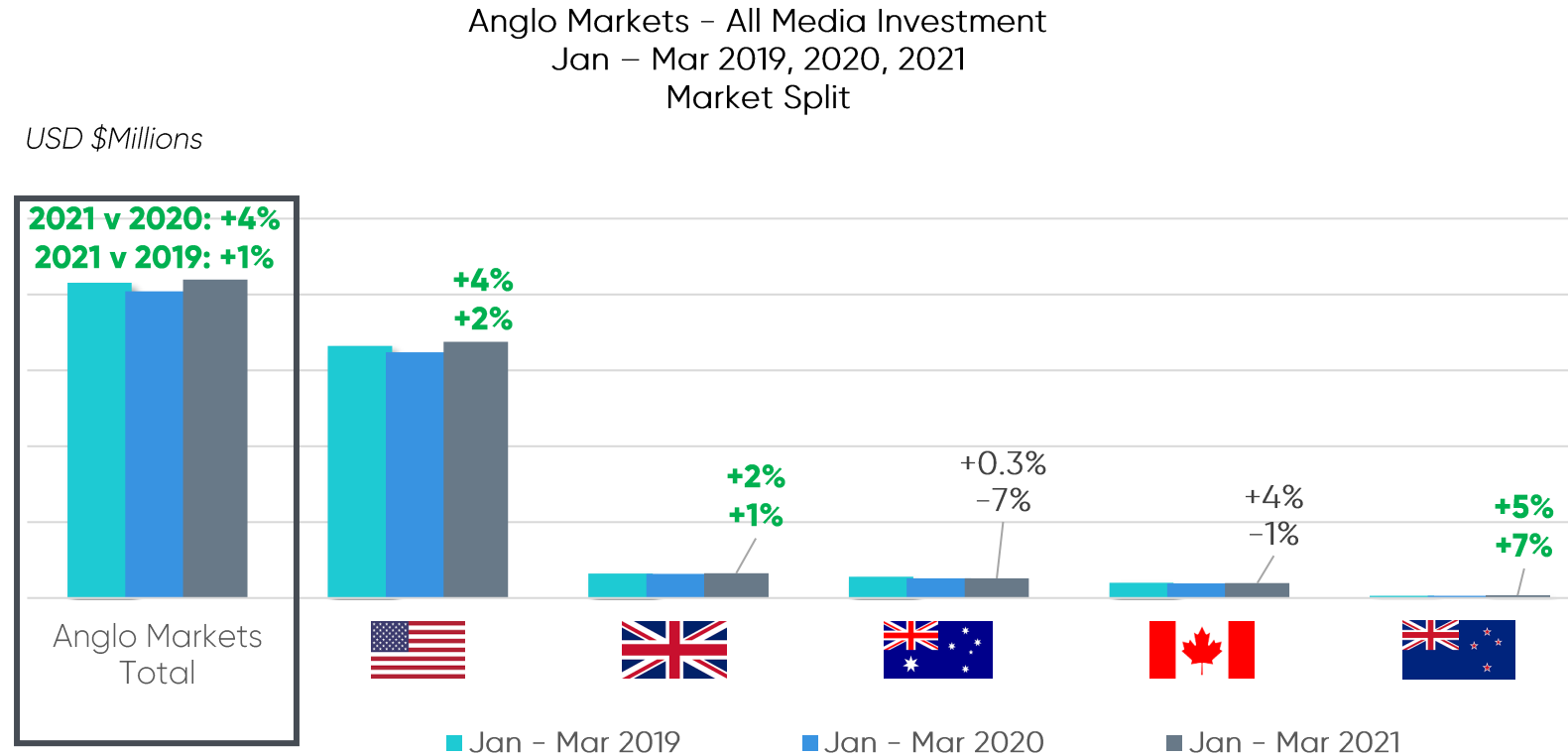
## CATEGORY SHIFTS REFLECT COVID

Household Supplies continually seek relevant awareness. While Travel, Entertainment, and Restaurants remained challenged, their decline rates improved YOY & marketers can align to pent-up demand as vaccines roll out.

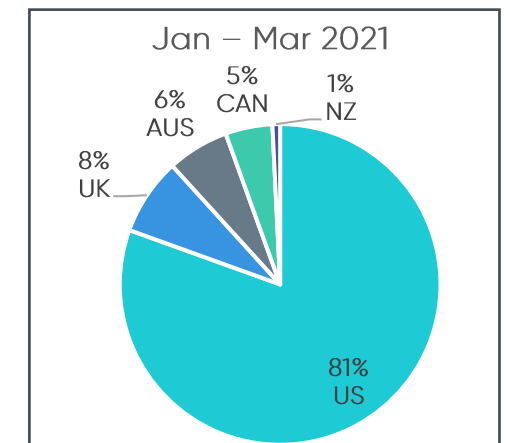
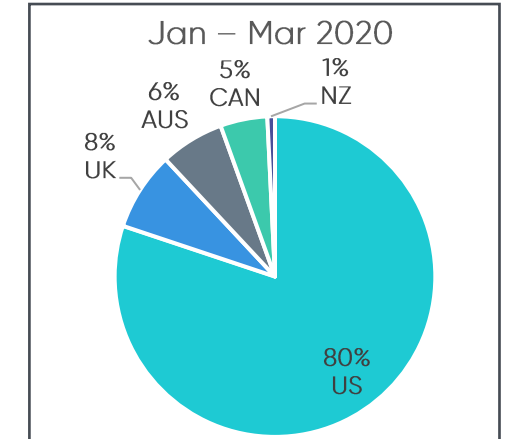
# ANGLO MARKETS OVERVIEW

Jan – Mar 2021

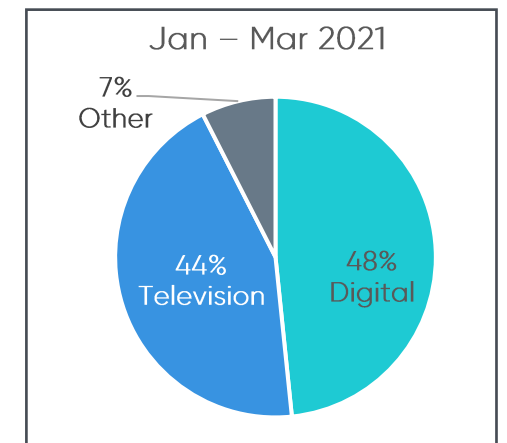
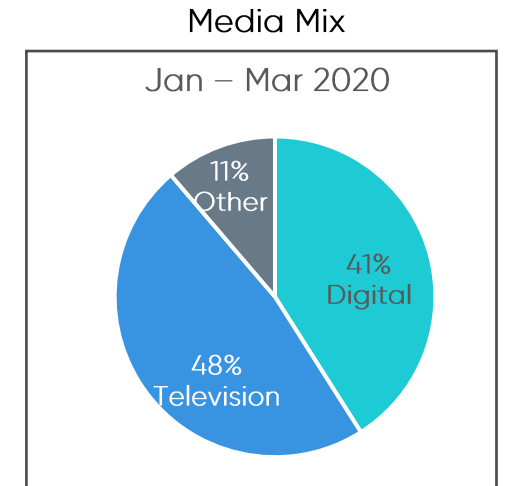
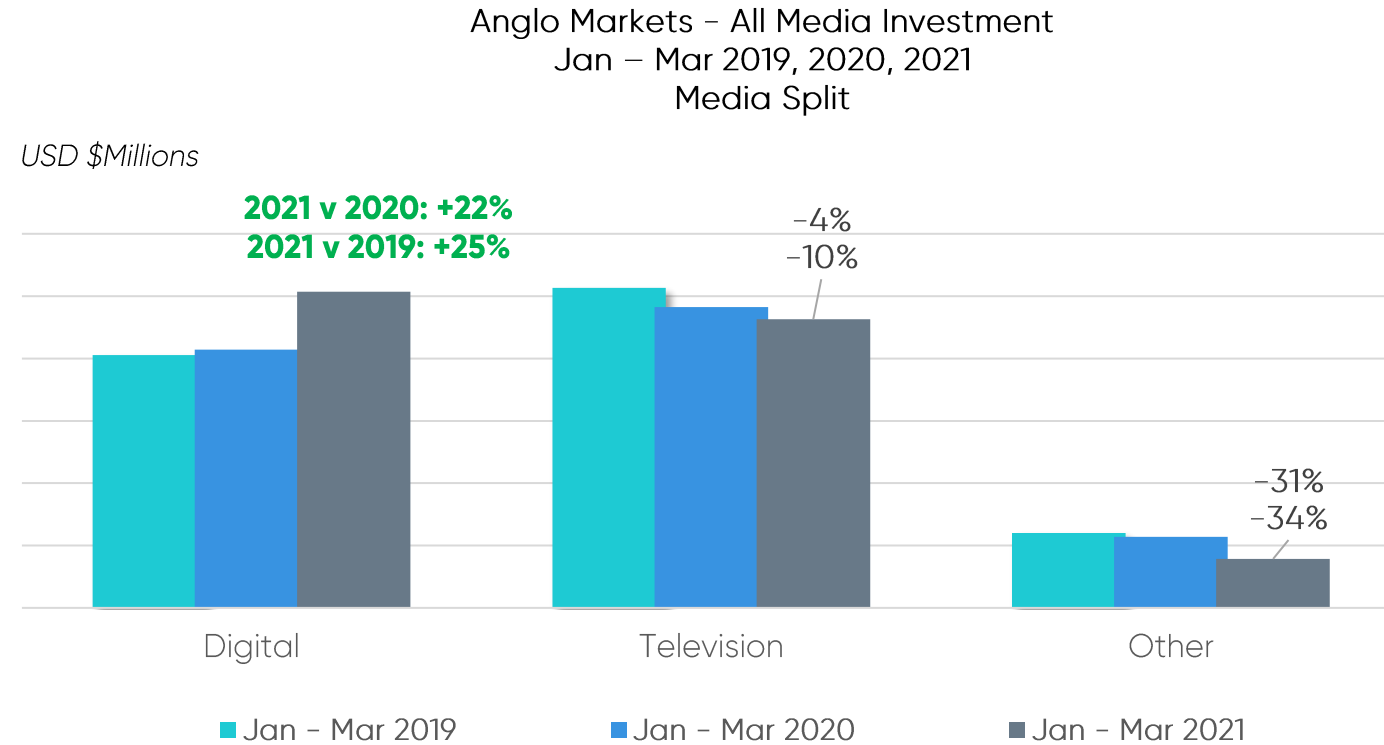
# ALL ANGLO MARKETS INCREASED AD SPEND IN Q1 2021 VS Q1 2020, WHILE THREE MARKETS EXPANDED VS Q1 2019 AS A POSITIVE RECOVERY INDICATOR.



Share of Investment by Market

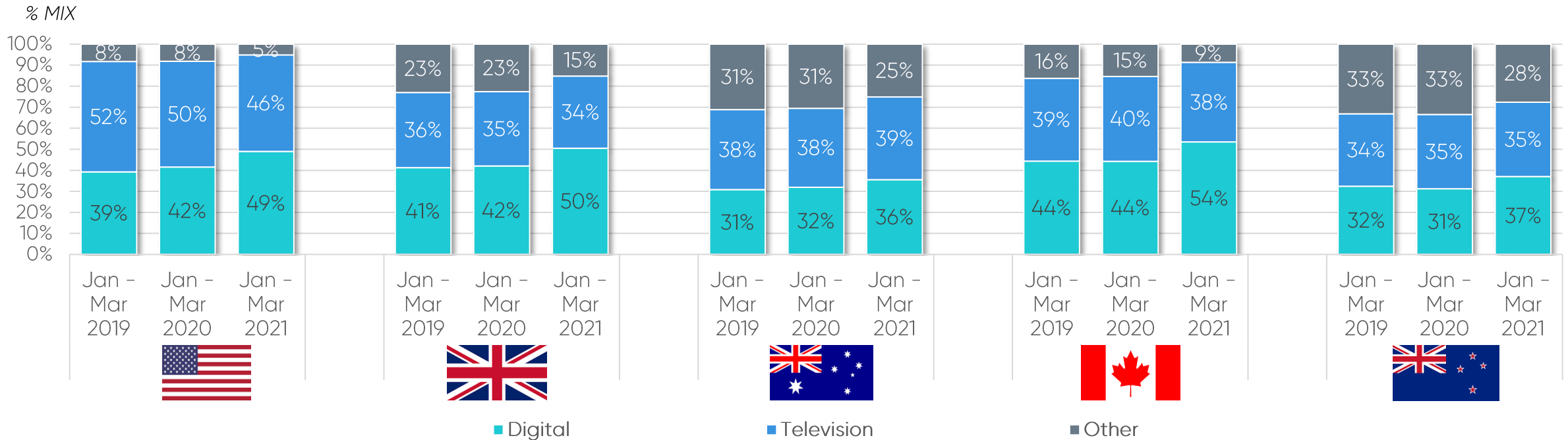


# DIGITAL AD SPEND SURGED TO A NEW LEVEL IN Q1 2021, INCREASING AN IMPRESSIVE +25% VS Q1 2019 AND CLAIMING TV'S 48% SHARE POSITION YOY.



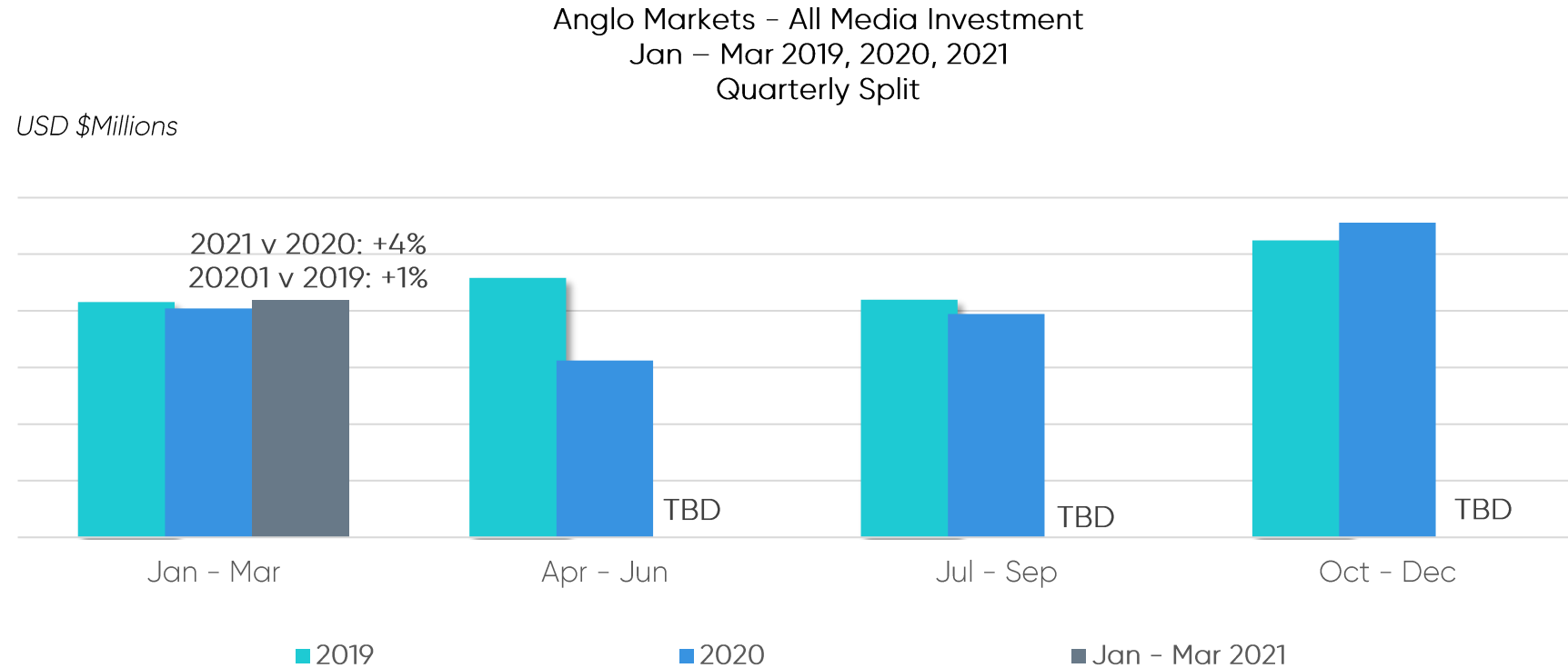
# Q1 DIGITAL ALLOCATION PEAKED ACROSS THE BOARD IN 2021, HOVERING AT 50% IN THREE OF THE MARKETS WITH CANADA NOTABLY LEADING AT 54%.

Anglo Markets – Media Mix  
Jan – Mar 2019, 2020, 2021  
Market Split





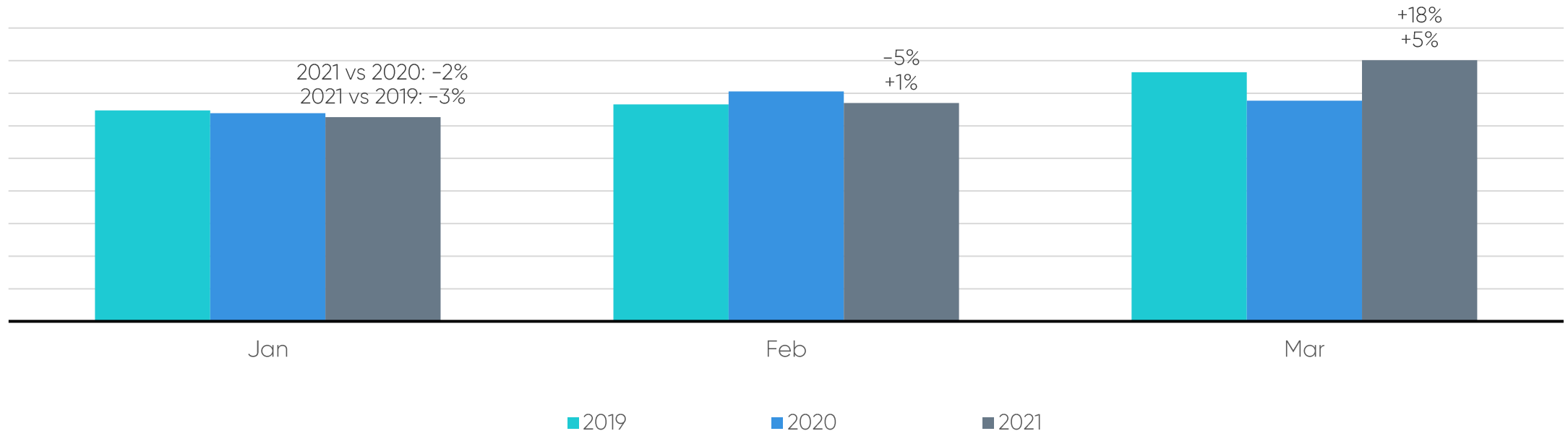
Q1 AVERAGED 23.6% OF AD SPEND THE LAST TWO YEARS; IF THAT RELATIONSHIP HOLDS IN 2021, ANNUAL 2021 AD SPEND WOULD REACH +7%.



# WHILE JANUARY EXPERIENCED SLIGHT CONSECUTIVE DECLINES & FEBRUARY PERFORMANCE FLUCTUATED, MARCH TRENDED POSITIVELY VS 2019 & 2020.

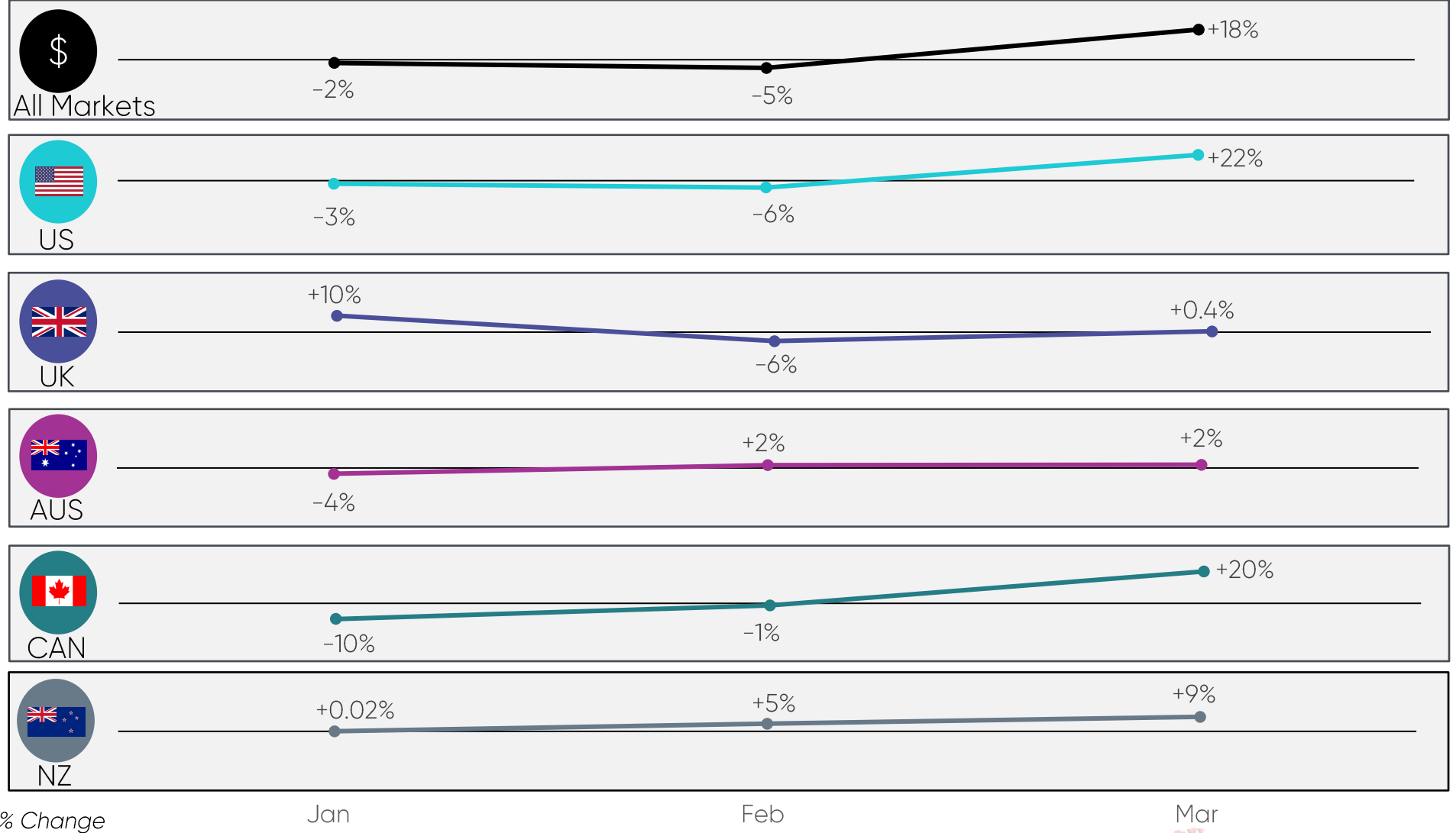
Anglo Markets – Investment Seasonality  
Jan – Mar 2019, 2020, 2021  
Monthly Split

USD \$Millions



WHILE MOST MARKETS' AD SPEND DECLINED IN JANUARY & FEBRUARY, MARCH UNIVERSALLY GREW, LED BY THE US AND CANADA AT ROUGHLY +20%.

Anglo Markets – Investment Seasonality  
Jan – Mar 2021 YOY  
Percent Change by Month, Market Split

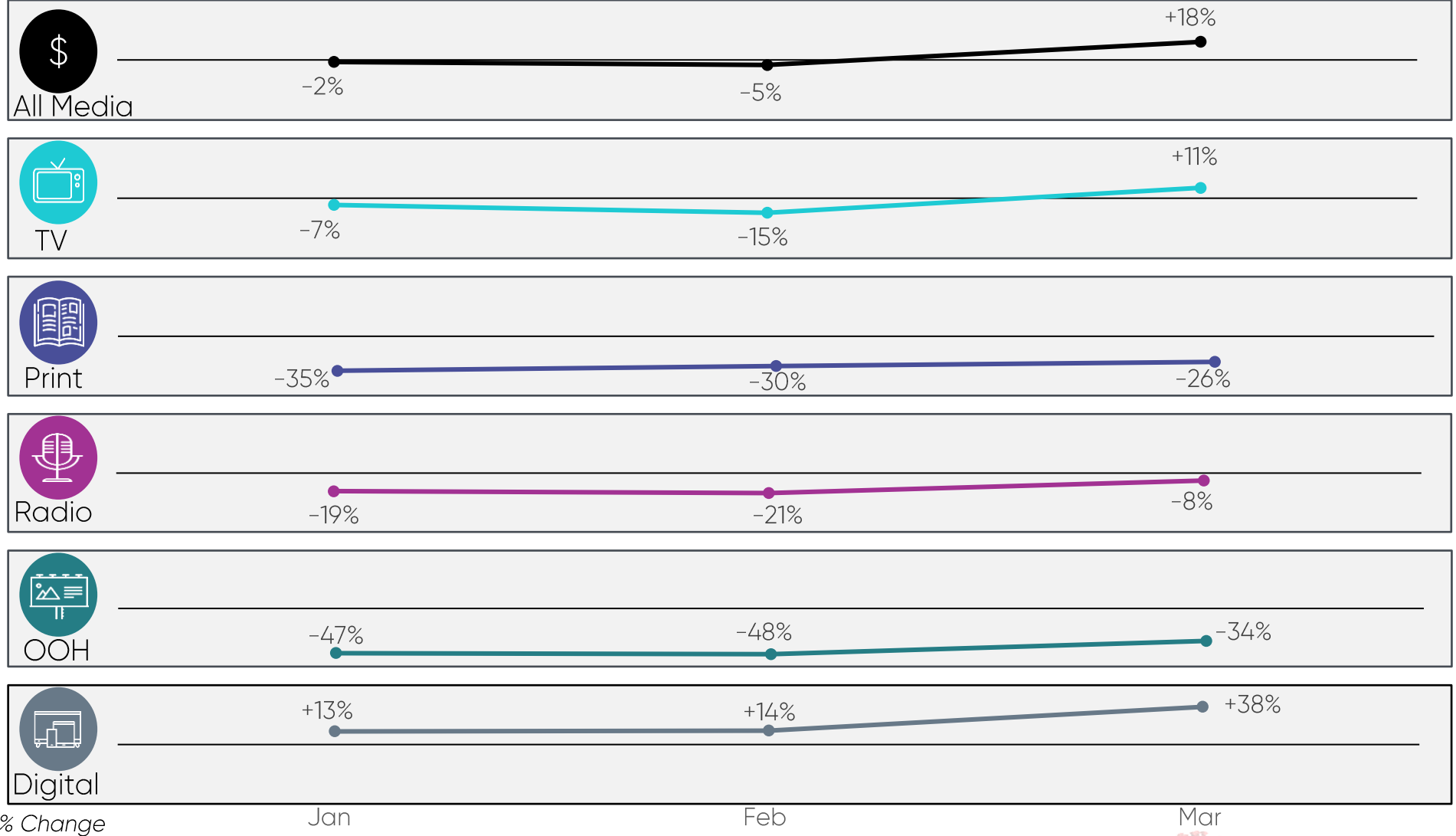


Source: SMI Pool | Markets include USA, UK, Canada, Australia, New Zealand  
Media formats include TV, Magazines, Newspapers, OOH/Cinema, Radio, and Digital  
SMI Client Report | Cannot be Distributed Without SMI's Consent

DIGITAL GREW BY DOUBLE DIGITS IN EVERY MONTH, WHILE TV FOLLOWED SUIT IN MARCH.

RADIO NOTABLY IMPROVED TO SINGLE DIGIT VARIANCE IN MARCH.

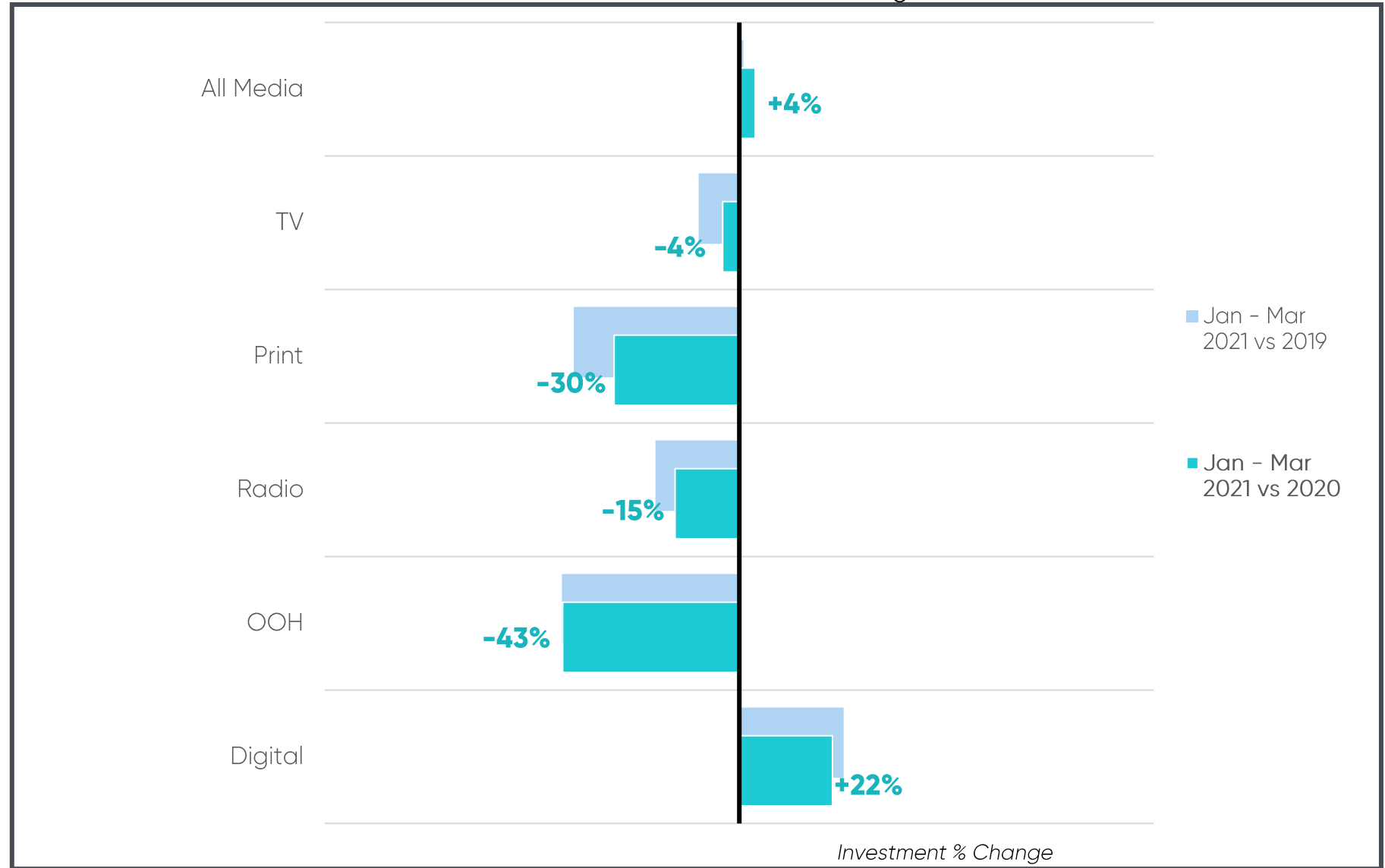
Anglo Markets – Investment Seasonality  
Jan – Mar 2021 YOY  
Percent Change by Month, Media Split



COVID-19

DIGITAL  
OUTPERFORMS,  
WITH Q1  
GROWTH VS  
2020 & 2019  
ALIKE, WHILE TV  
SHOWED  
STABILITY VS  
THE OTHER  
OFFLINE  
CHANNELS.

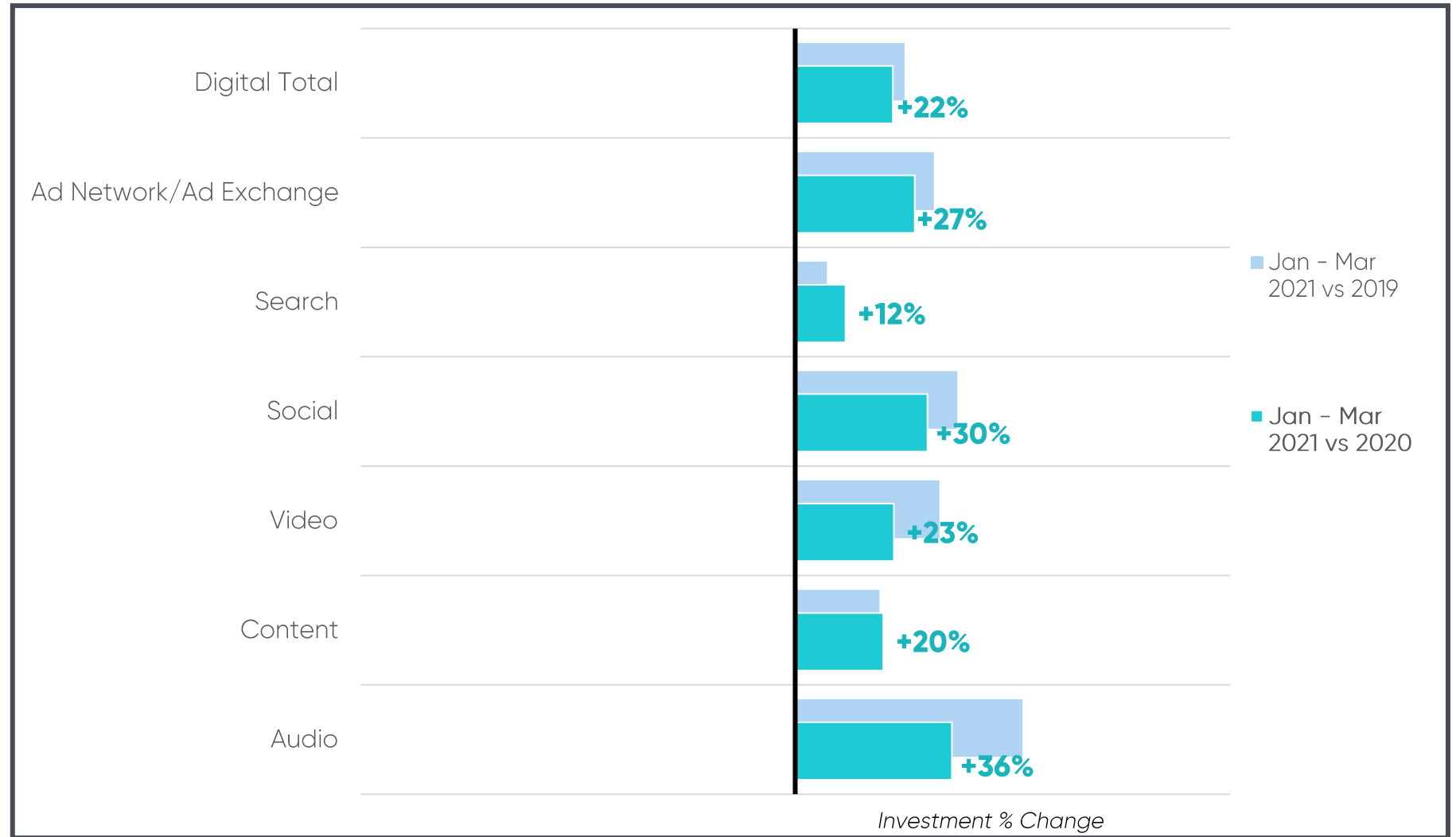
Anglo Markets – Media Subtypes  
Jan – Mar 2021 vs Prior Periods  
Investment Percent Change



ALL DIGITAL SUBTYPES EXPANDED DURING Q1, IN COMPARISON TO 2019 & 2020, LED BY AUDIO.

KEY SOCIAL & AUDIO TOUCHPOINTS REACHED AT LEAST +30% GROWTH IN Q1, AGAINST BOTH 2019 & 2020.

Anglo Markets – Digital Media Subtypes  
Jan – Mar 2021 vs Prior Periods  
Investment Percent Change

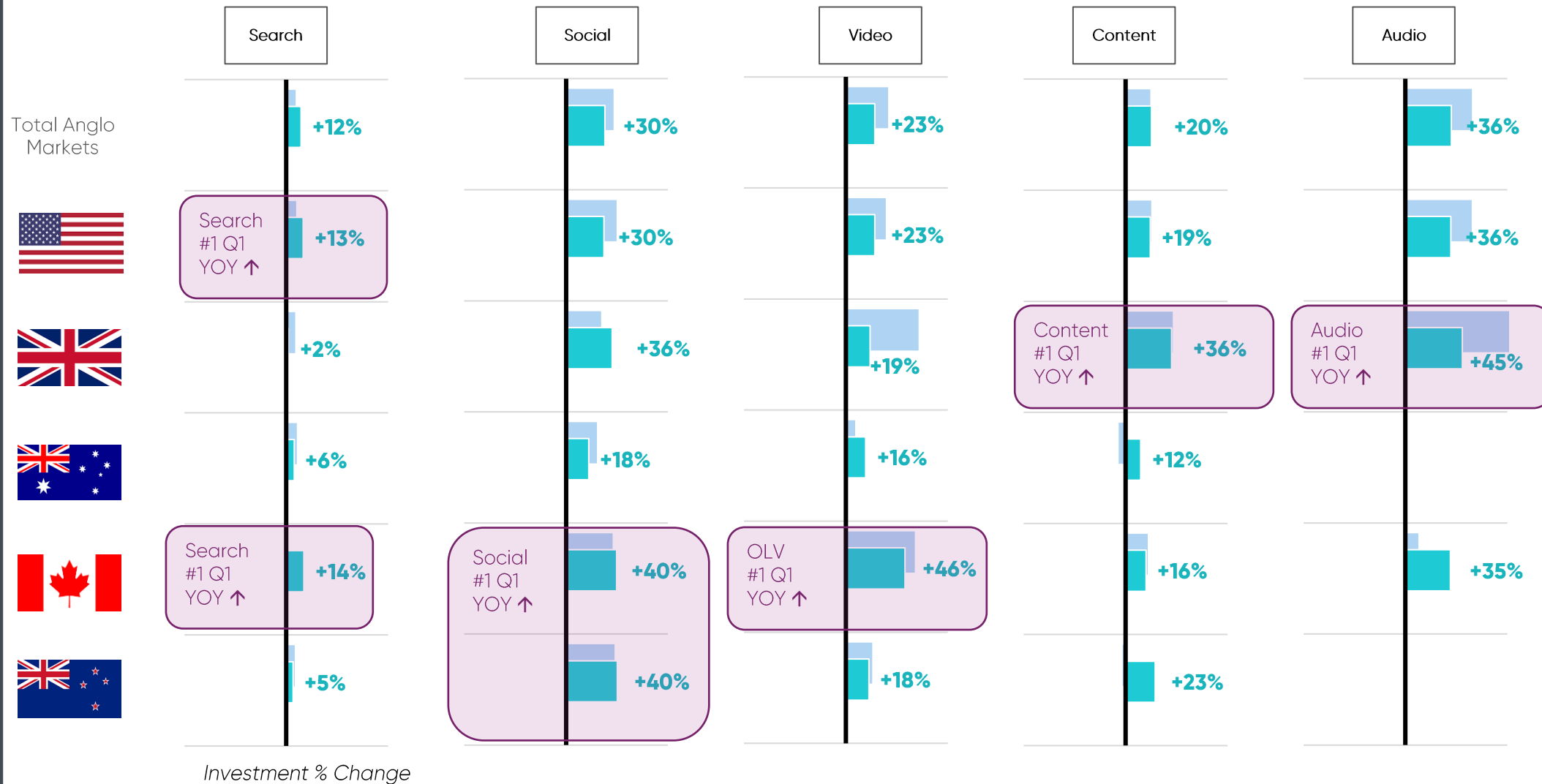


Q1 2021 AD SPEND SURPASSED 2019 & 2020 FOR ALL SUBTYPES ACROSS MARKETS, APART FROM THE CONTENT SUBTYPE IN AUS & NZ.

Anglo Markets Breakout – Digital Media Subtypes  
Jan – Mar 2021 vs Prior Periods  
Investment Percent Change

Jan – Mar 2021 vs 2019

Jan – Mar 2021 vs 2020

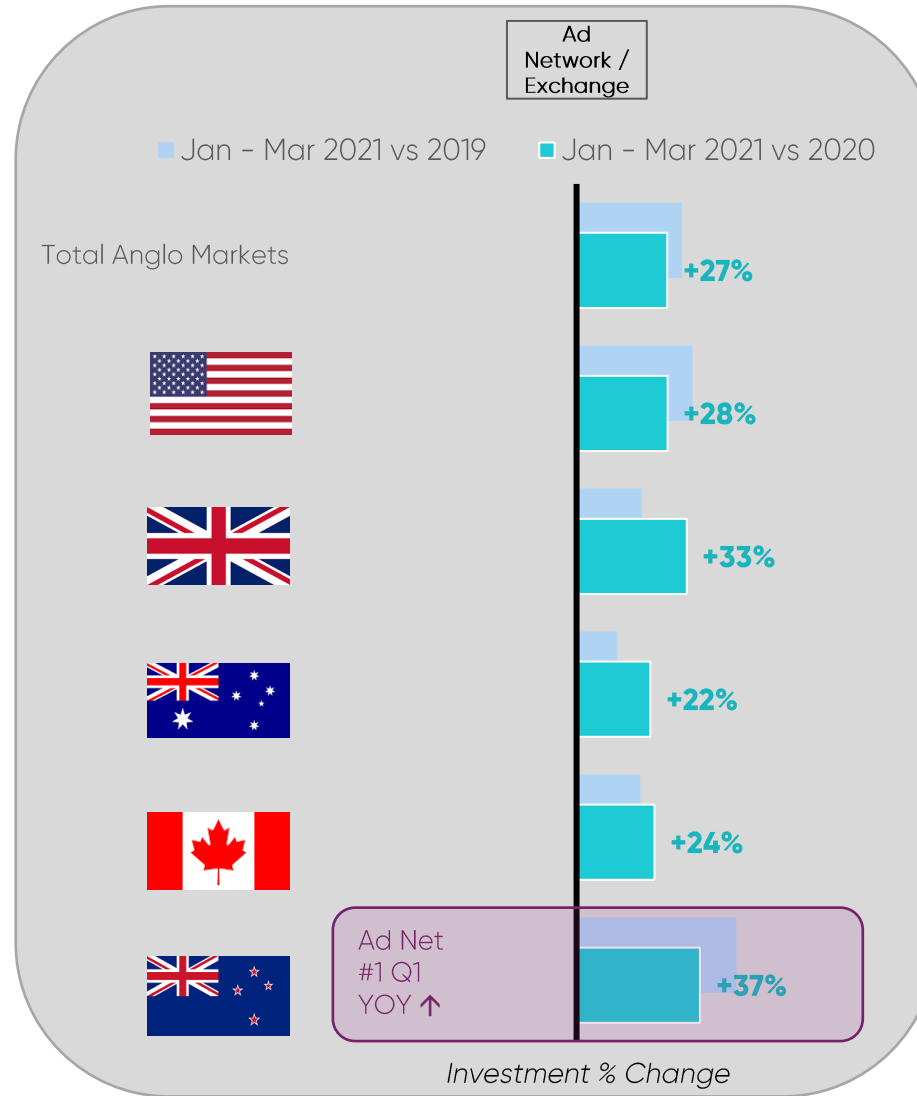


Source: SMI Pool | Markets include USA, UK, Canada, Australia, New Zealand  
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SMI Client Report | Cannot be Distributed Without SMI's Consent

\*Subtype order based on Jan – Mar 2021 investment  
\*Not showing "Ad Network / Exchange" nor "Other" digital subtype  
\*Audio breakout not available in AUS & NZ

PROGRAMMATIC  
DIGITAL  
APPROACHED  
+30% LIFTING Q1  
2021, AGAINST  
BOTH 2019 &  
2020,  
INDICATING  
CONTINUED  
MARKETER  
RELIANCE.

Anglo Markets Breakout – Digital Ad Network / Exchange  
Jan – Mar 2021 vs Prior Periods  
Investment Percent Change



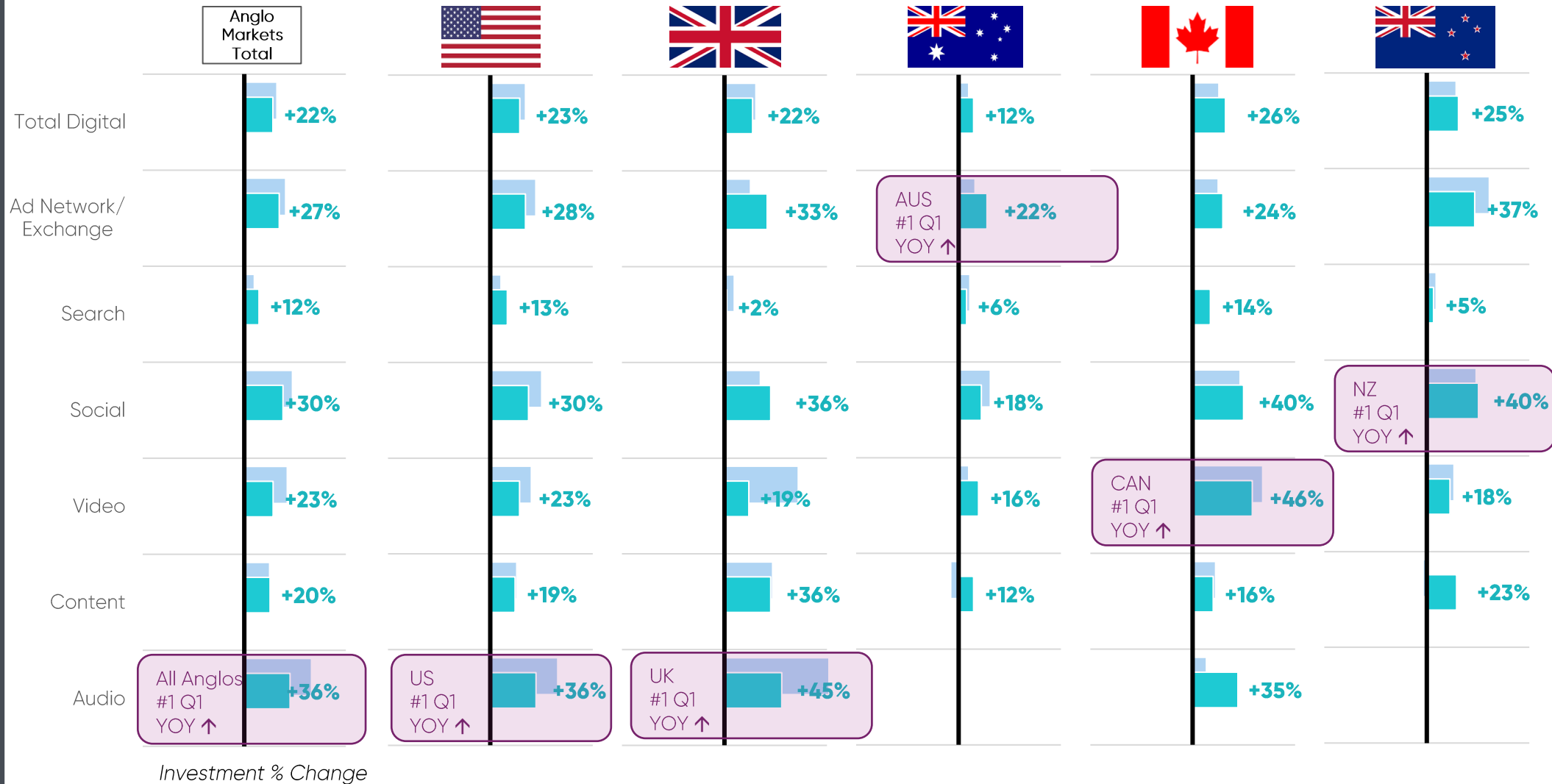


LEADING DIGITAL SUBTYPE GROWTH, IN Q1 YOY, REACHED +40% OR MORE FOR NEW ZEALAND SOCIAL, UK AUDIO, AND CANADA OLV.

Anglo Markets Breakout – Digital Media Subtypes  
Jan – Mar 2021 vs Prior Periods  
Investment Percent Change

Jan – Mar 2021 vs 2019

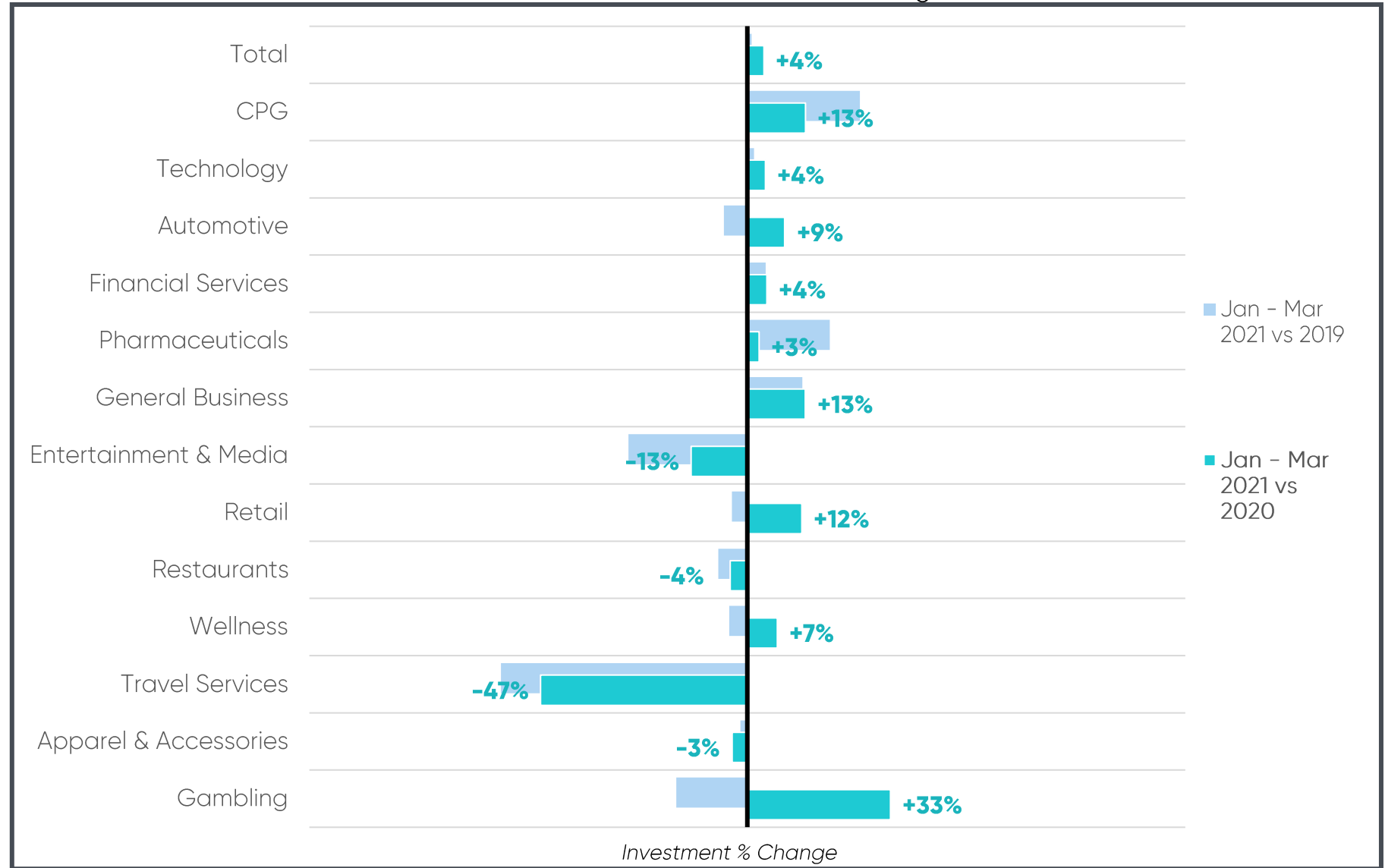
Jan – Mar 2021 vs 2019



Q1 2021 CPG, TECH, FINAN SERV, PHARMA, AND GEN BIZ INVESTMENT EXPANDED VS 2019 & 2020 ALIKE.

WHILE ENTERTAIN, RESTAURANTS, AND TRAVEL REACHED NEW LOWS, DECLINE RATES IMPROVED YOY.

Anglo Markets – All Category Groups  
Jan – Mar 2021 vs Prior Periods  
Investment Percent Change

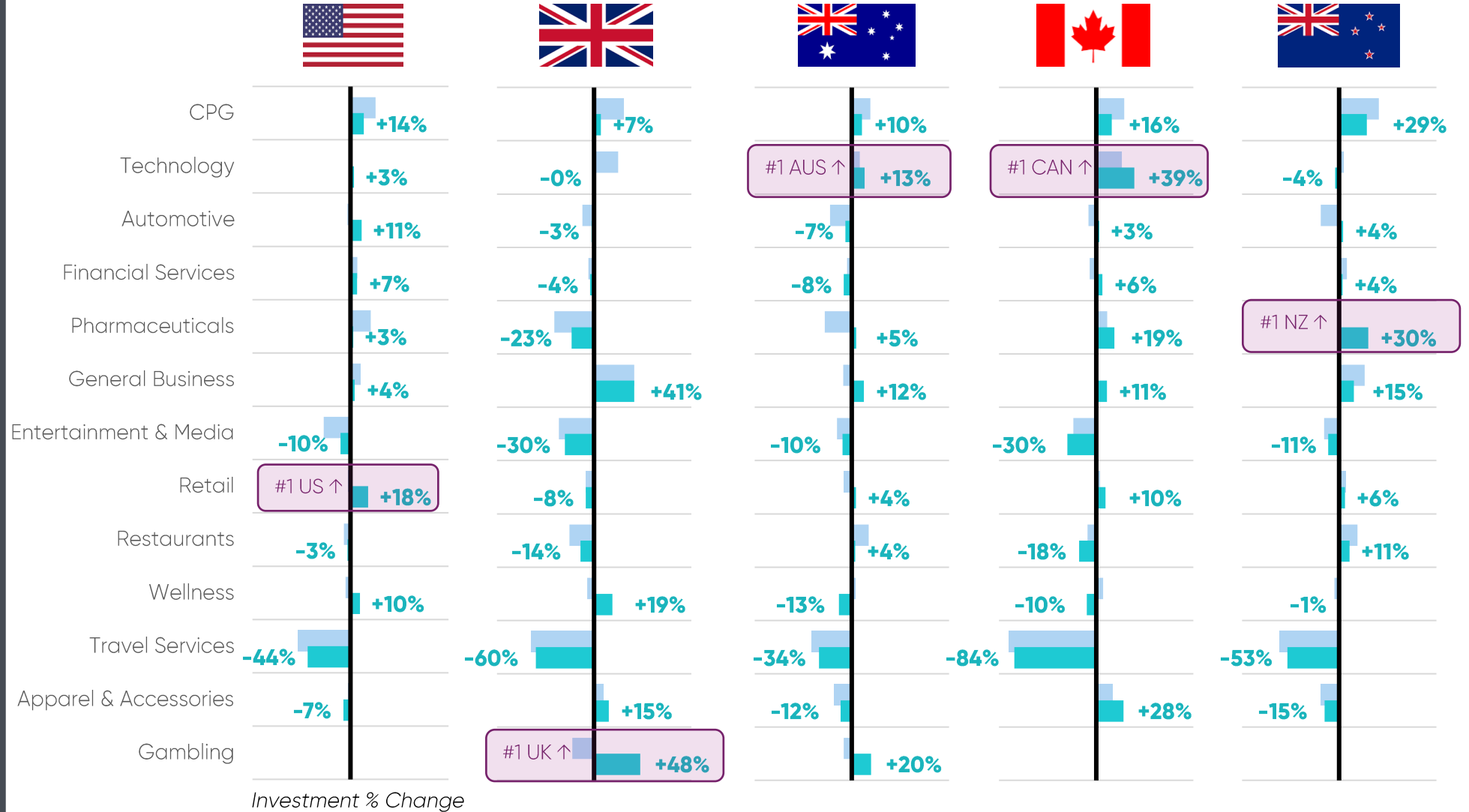


THE TOP-GROWTH CATEGORY GROUPS IN UK, NZ, AND CAN MARKETS REACHED AT LEAST +30%, WHILE US & AUS LEADERS HOVERED AT +15%.

Anglo Markets – All Category Groups  
Jan – Mar 2021 vs Prior Periods  
Investment Percent Change

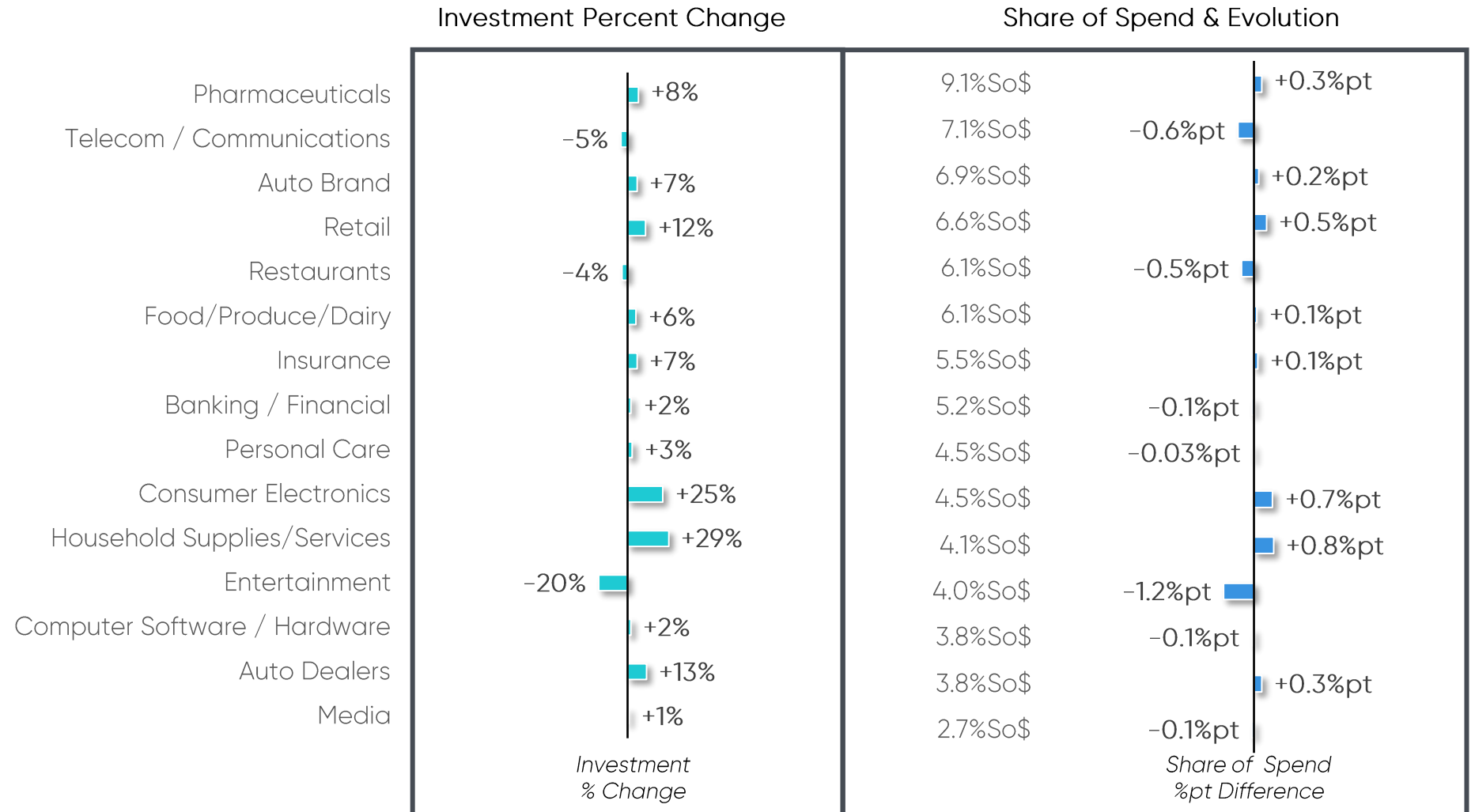
■ Jan – Mar 2021 vs 2020

■ Jan – Mar 2021 vs 2019



AMONG TOP CATEGORIES, HOUSEHOLD SUPPLIES & CONSUMER ELECTRONICS LED INVESTMENT GROWTH & SHARE GAINS IN Q1 2021.

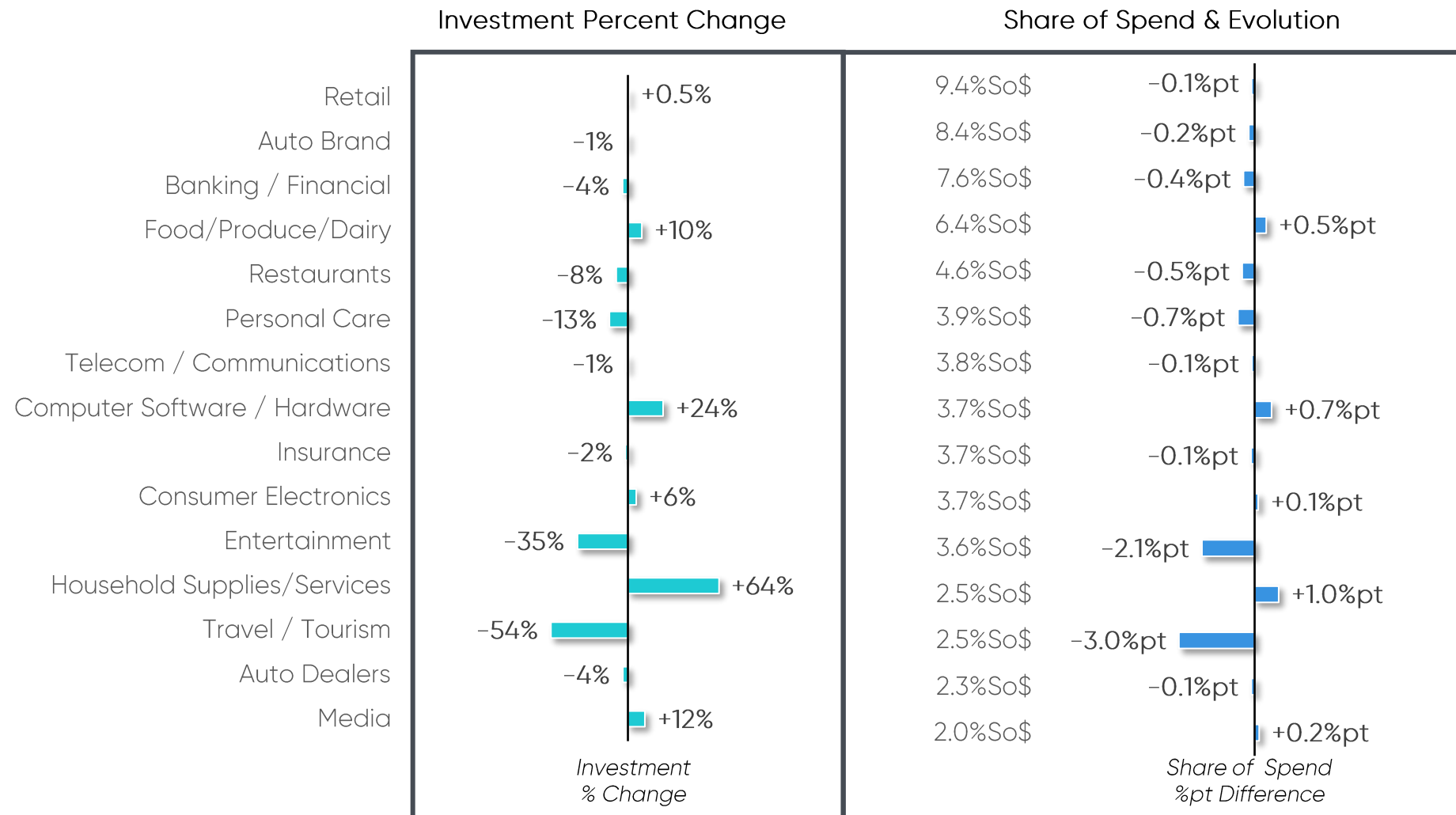
## Anglo Markets – Top 15 Categories Jan – Mar 2021 YOY



WHEN EXCLUDING THE US, HOUSEHOLD SUPPLIES REMAIN THE GROWTH LEADER AND AMPLIFY FROM +29% TO +64%.






CANADA NOTABLY CONTRIBUTED 74% OF INCREMENTAL DOLLARS TO THE CATEGORY.

## Anglo Markets – Top 15 Categories (Excluding US) Jan – Mar 2021 YOY



GIVEN CONTINUED COVID DYNAMICS, HOUSEHOLD SUPPLIES REMAIN A LEADING SOURCE OF INCREMENTAL AD DOLLARS. ALTHOUGH TRAVEL & ENTERTAINMENT CONTINUE TO RECEDE ACROSS MARKETS, DEMAND IS PRIMED TO RETURN AS VACCINES ROLLOUT.

Anglo Markets - All Media Investment  
Top Investment & Divestment Categories  
Jan - Mar 2021 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>
Household Supplies/Services +29%	Consumer Electronics +29%	Gambling +48%	Government +55%	Household Supplies/Services +148%	Utilities/Fuel /Energy +45%
Consumer Electronics +25%	Retail +18%	Health Care +142%	Alcoholic Beverages +31%	Computer Soft/ Hardware +121%	Non-Alcoholic Beverages +67%
Alcoholic Beverages +39%	Household Supplies/Services +25%	Utilities/Fuel /Energy +85%	Gambling +20%	Food/Produce /Dairy +18%	Household Supplies/Services +76%
<b>Category Losses</b>	<b>Category Losses</b>	<b>Category Losses</b>	<b>Category Losses</b>	<b>Category Losses</b>	<b>Category Losses</b>
Travel / Tourism -47%	Travel / Tourism -44%	Travel / Tourism -60%	Travel / Tourism -34%	Entertainment -41%	Travel / Tourism -53%
Entertainment -20%	Entertainment -16%	Entertainment -48%	Banking / Financial -13%	Travel / Tourism -84%	Entertainment -53%
OTC Medicines & Remedies -25%	Government -66%	Telecom / Communications -18%	Entertainment -13%	Personal Care -28%	Telecom / Communications -10%

Source: SMI Pool | Markets include USA, UK, Canada, Australia, New Zealand  
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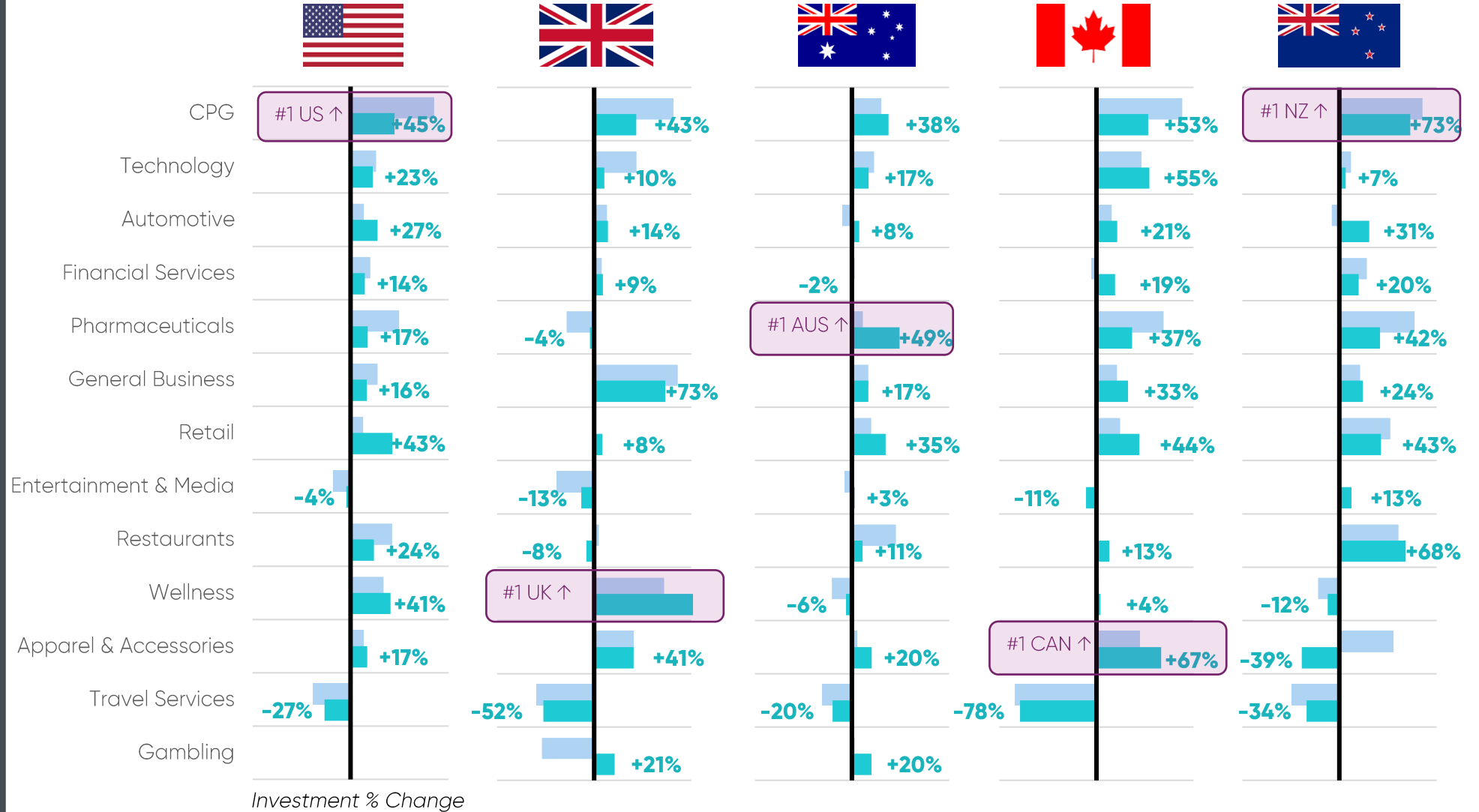
\*Top based on Jan - Mar 2021 investment \$ difference.

COMPARED TO ALL MEDIA, DIGITAL CATEGORY GROWTH WAS MORE FREQUENTLY POSITIVE, TYPICALLY REACHING DOUBLE-DIGIT LIFT ACROSS MARKETS.

Anglo Markets – All Category Groups  
Jan – Mar 2021 vs Prior Periods  
Digital Investment Percent Change

Jan – Mar 2021 vs 2020






Jan – Mar 2021 vs 2019



# WITHIN DIGITAL, RETAIL AND FOOD / PRODUCE / DAIRY SECTORS MOST FREQUENTLY DRIVE INCREMENTAL AD SPEND, WHILE TRAVEL AND ENTERTAINMENT REMAIN THE PRIMARY DETRACTORS



Anglo Markets - Digital Media Investment  
Top Investment & Divestment Categories  
Jan - Mar 2021 YOY

Anglo Markets Total					
<b>Category Wins</b>					
Retail +38%	Retail +43%	Food/Produce/Dairy +48%	Retail +35%	Retail +44%	Retail +43%
Personal Care +44%	Personal Care +46%	Personal Care +52%	Government +57%	Auto Dealers +25%	Food/Produce/Dairy +99%
Pharmaceuticals +25%	Pharmaceuticals +24%	Fashion / Accessories +41%	Food/Produce/Dairy +38%	Auto Brand +19%	Restaurants +68%
<b>Category Losses</b>					
Travel / Tourism -32%	Travel / Tourism -27%	Travel / Tourism -52%	Travel / Tourism -20%	Travel / Tourism -78%	Travel / Tourism -34%
Entertainment -12%	Government -60%	Entertainment -43%	Health & Fitness -31%	Entertainment -30%	Entertainment -46%
OTC Medicines & Remedies -17%	Entertainment -7%	Auto Dealers -85%	Banking / Financial -3%	Health & Fitness -34%	Fashion / Accessories -39%

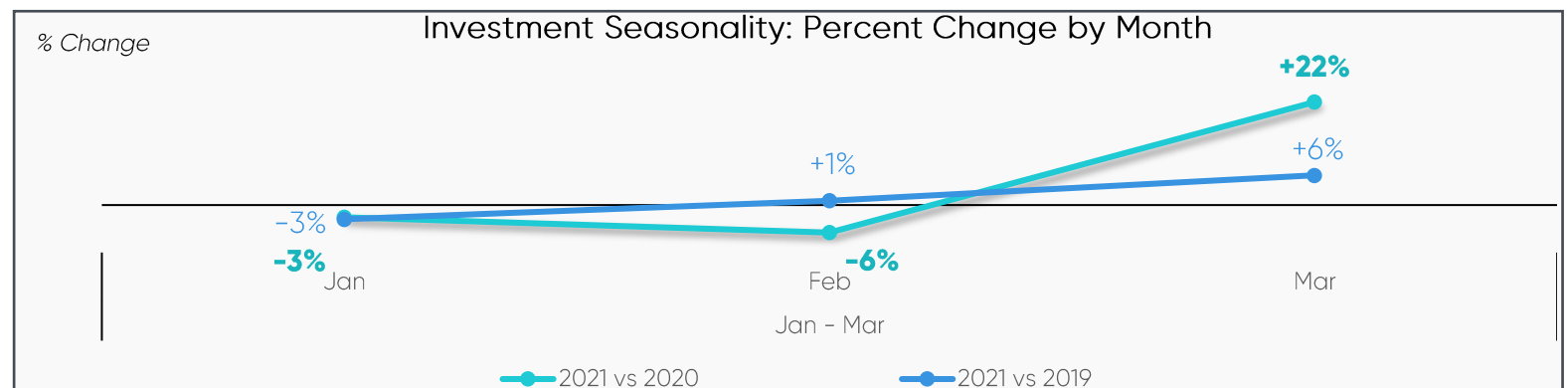
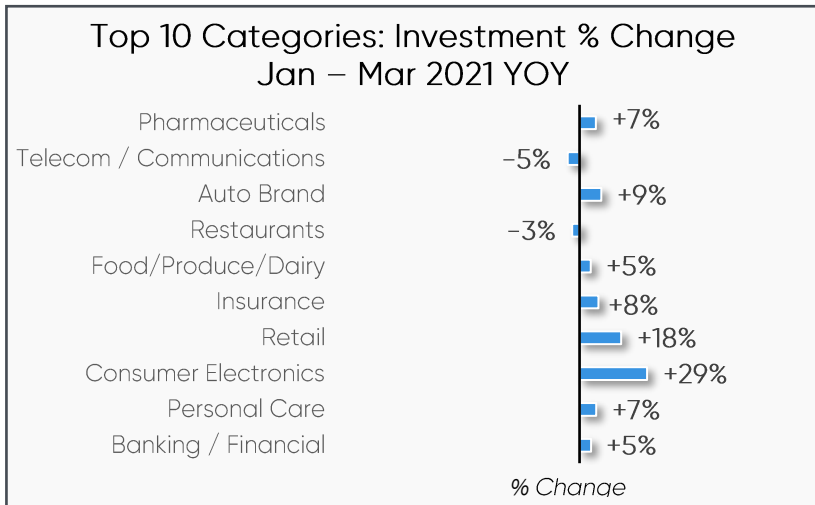
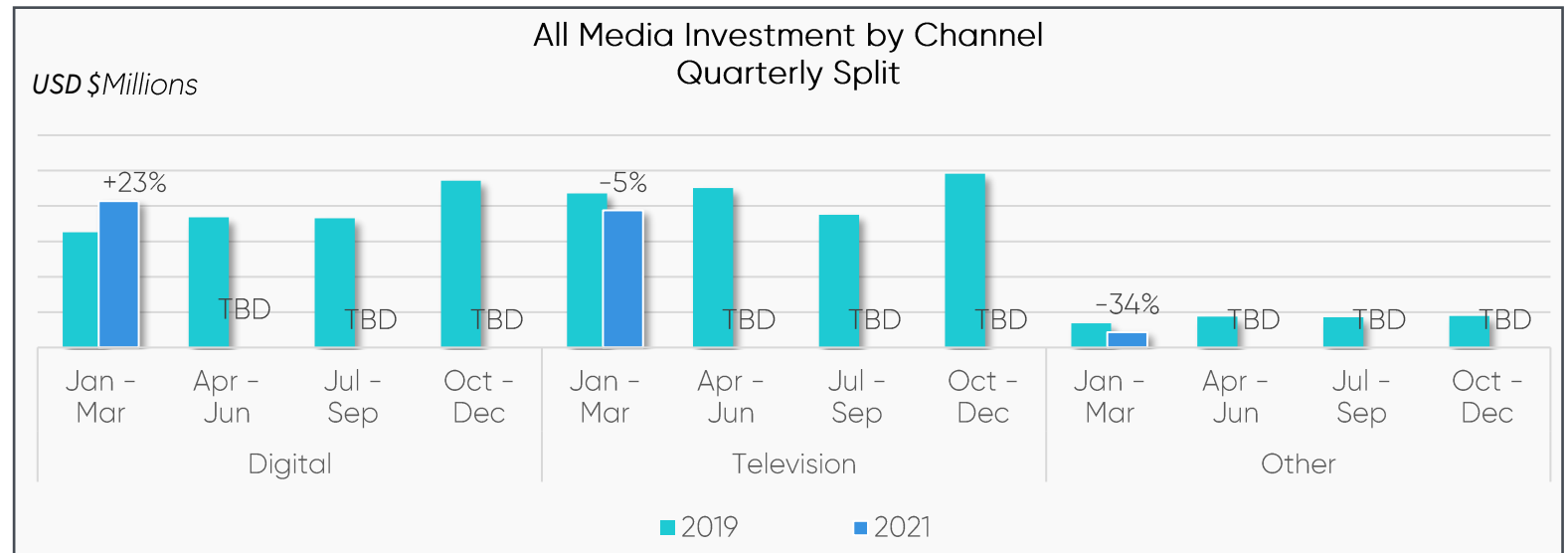
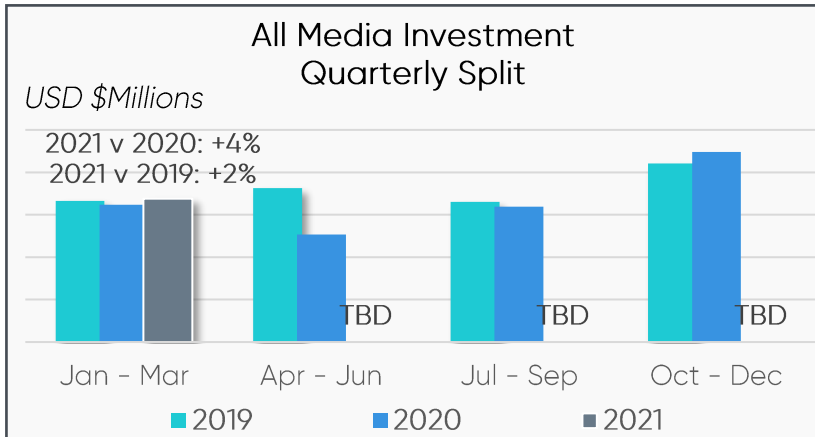
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\*Top based on Jan - Mar 2021 investment \$ difference.



# MARKET SNAPSHOT

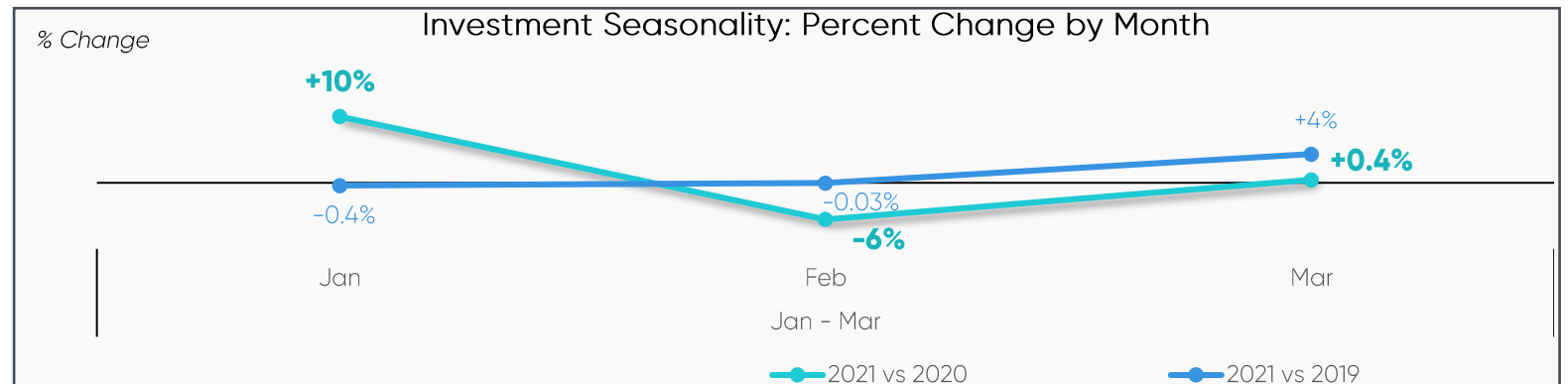
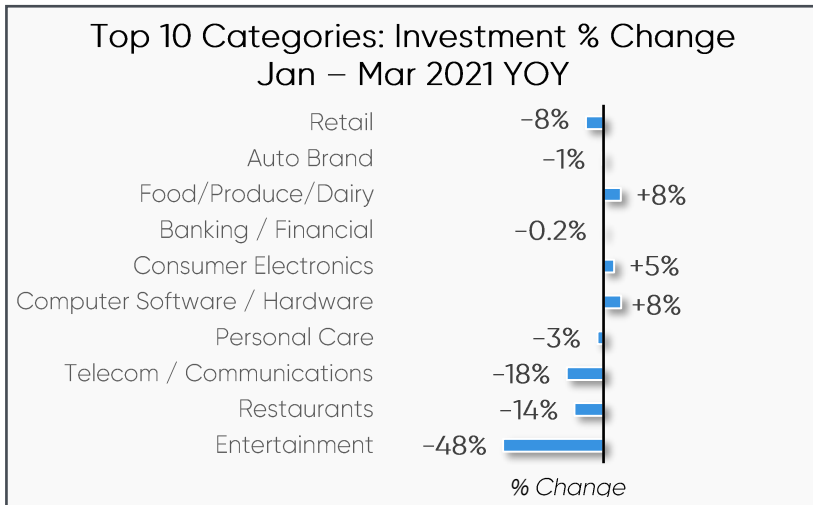
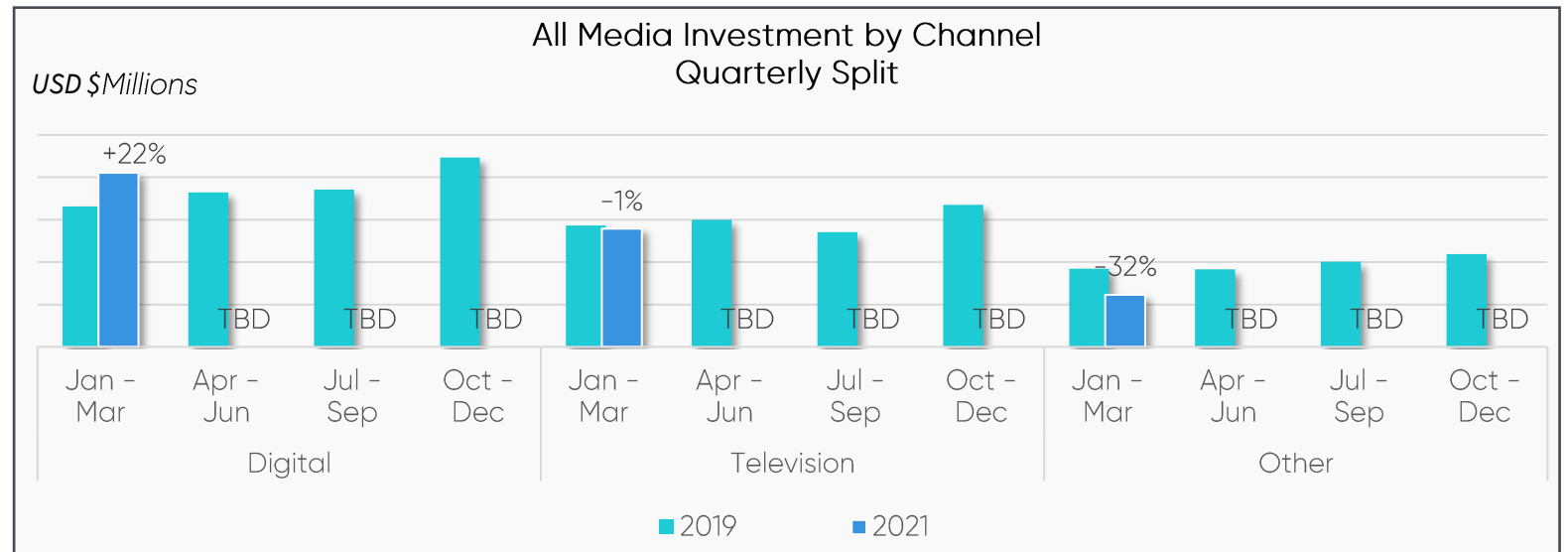
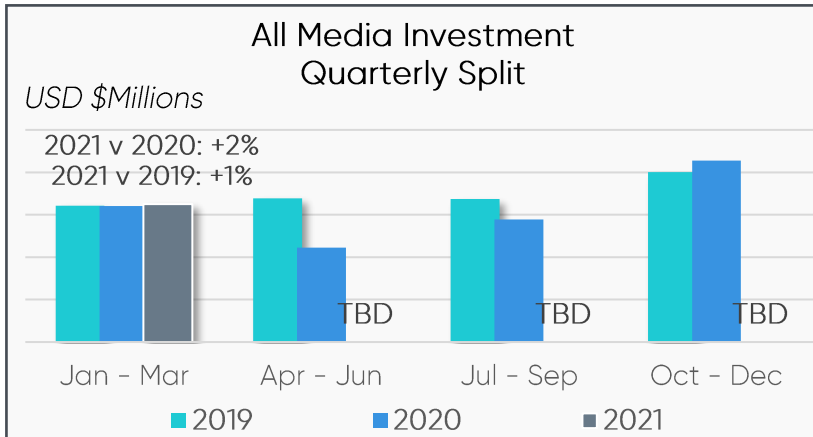
IN THE US, STRONG +23% DIGITAL GROWTH CARRIED Q1 2021 PERFORMANCE. THE US SET THE BAR FOR MULTIMEDIA MARCH LIFT AT +22% YOY. AMONG TOP CATEGORIES, CONSUMER ELECTRONICS & RETAIL GREW BY DOUBLE DIGITS.



THE UK SAW +22% DIGITAL LIFT & THE MOST STABLE -1% TV VARIANCE IN Q1 YOY. MONTHLY LIFT PEAKED IN JAN, WHILE MAR LED THE CHARGE IN OTHER MARKETS. FOOD & COMPUTERS VIED FOR THE HIGHEST TOP-CATEGORY LIFT.



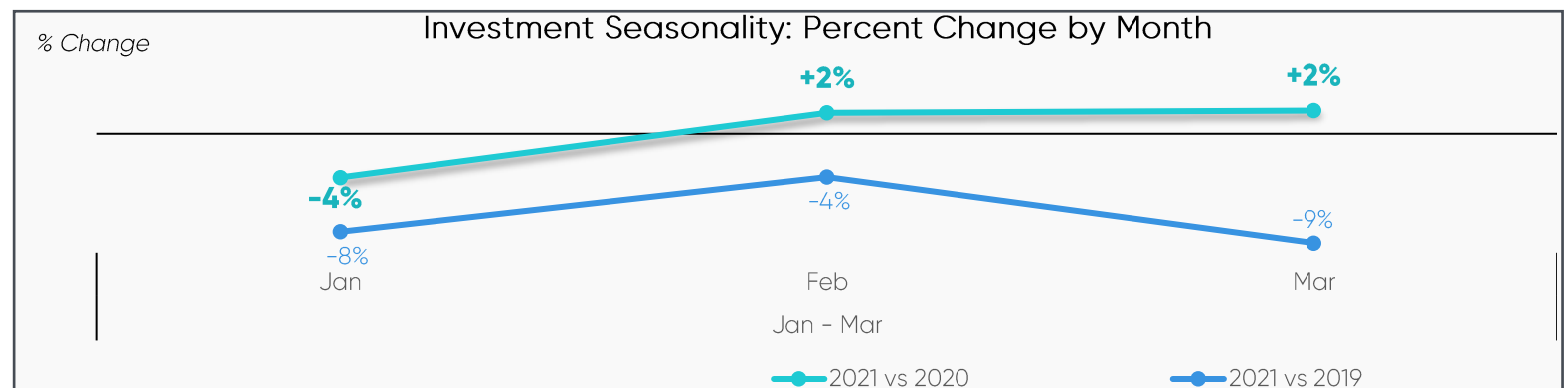
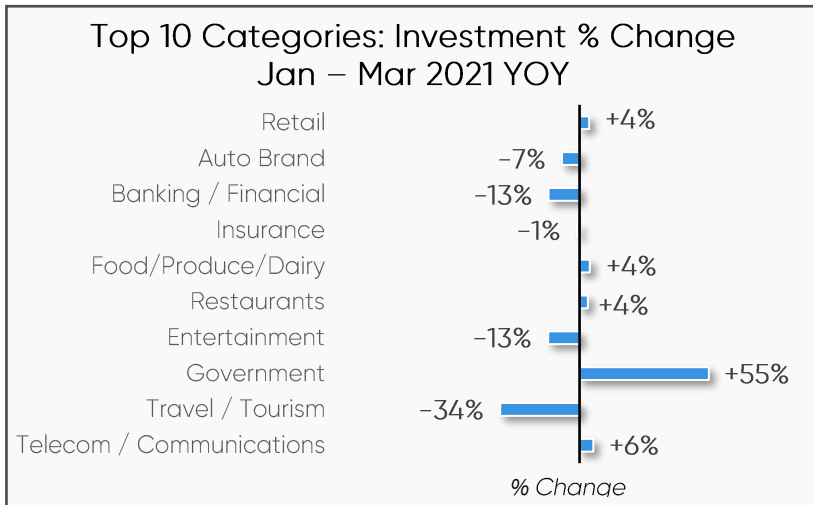
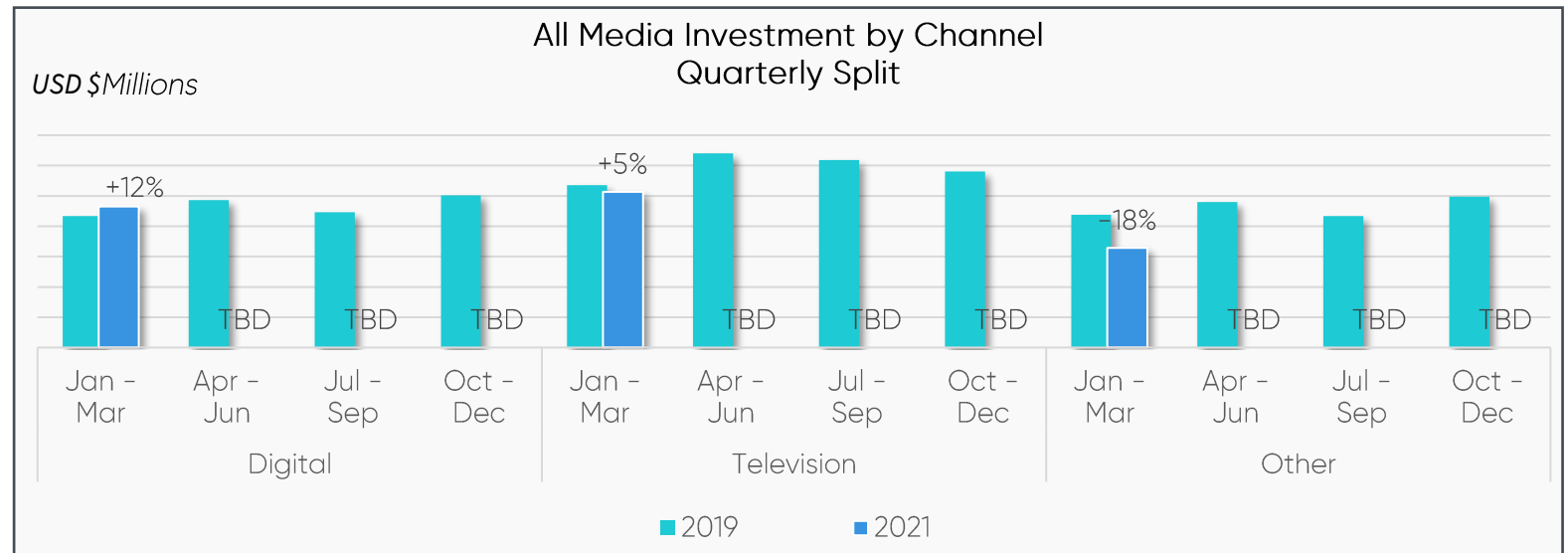
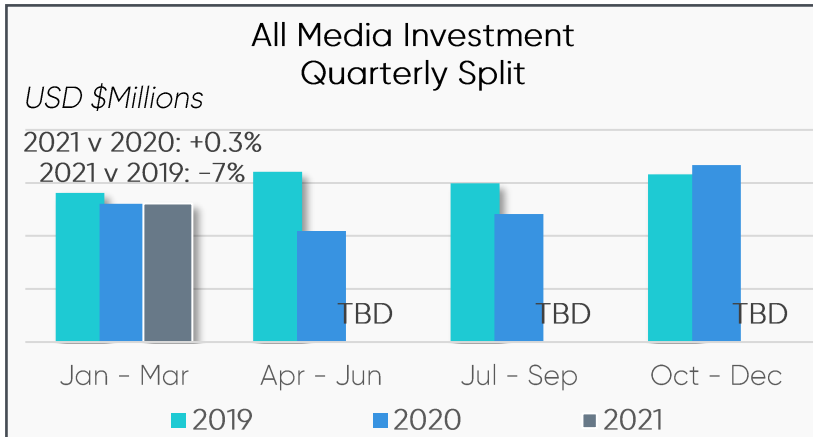
UK



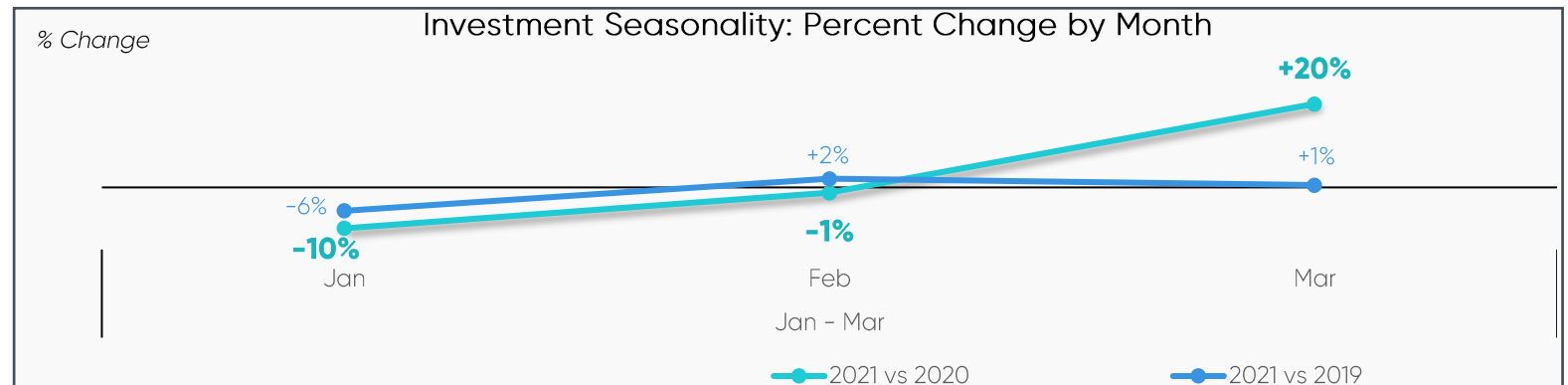
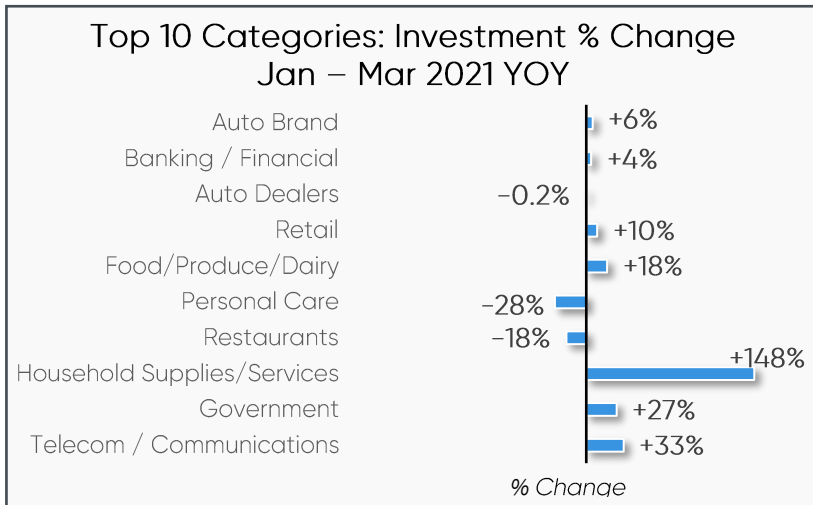
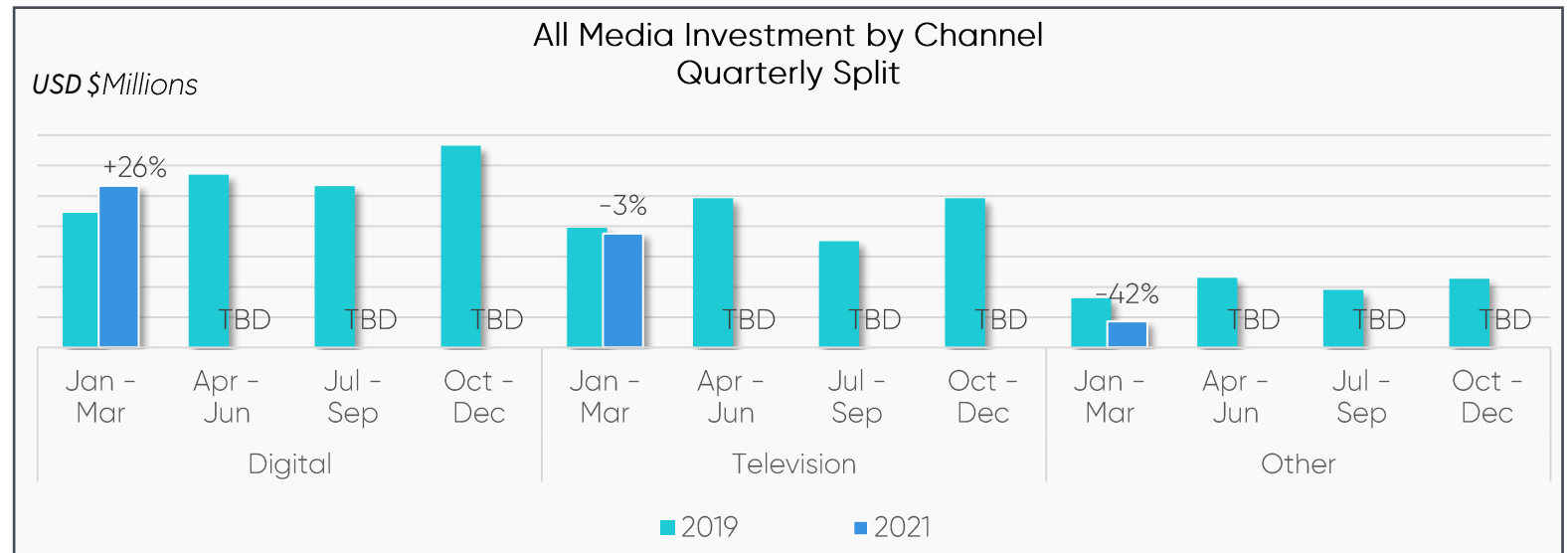
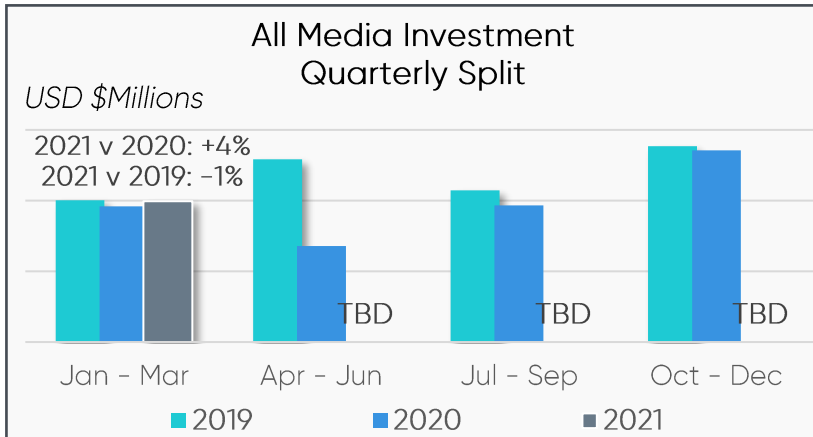
AUSTRALIA MAINTAINED FLAT +0.3% GROWTH YOY, ALTHOUGH SHOWING THE SOFTEST -7% TREND VS Q1 2019. AMONG TOP CATEGORIES, GOVERNMENT SPENDING GROWTH OUTPACED WITH +55% LIFT.



AUS



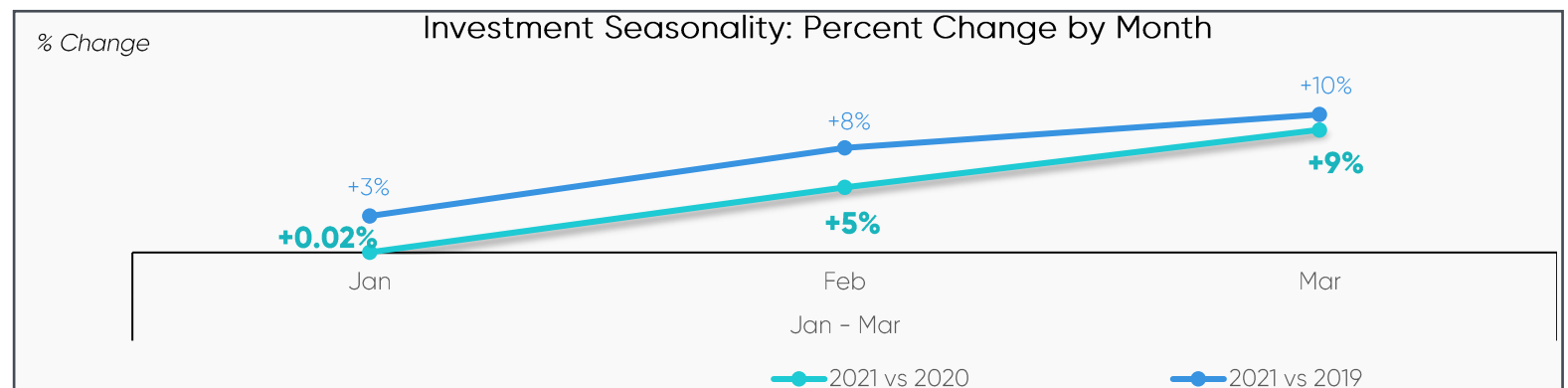
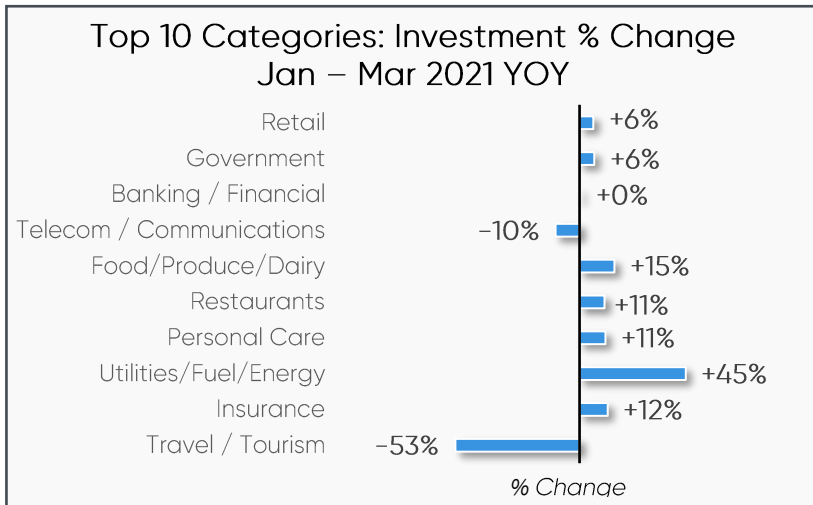
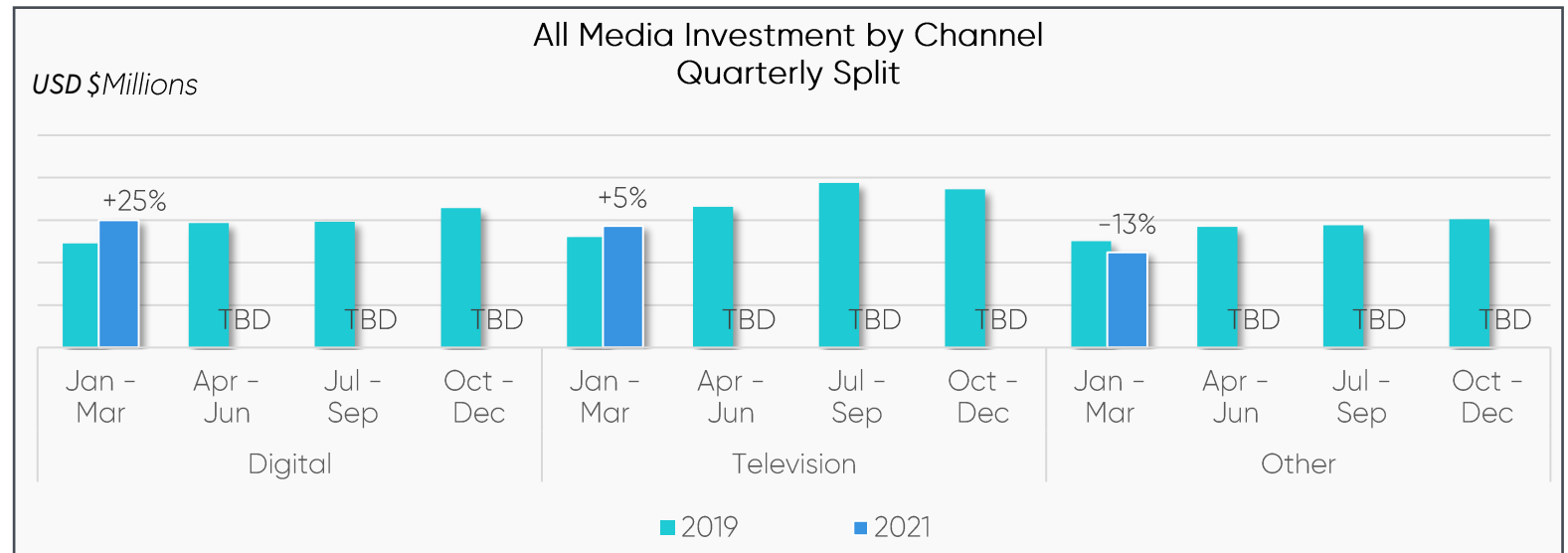
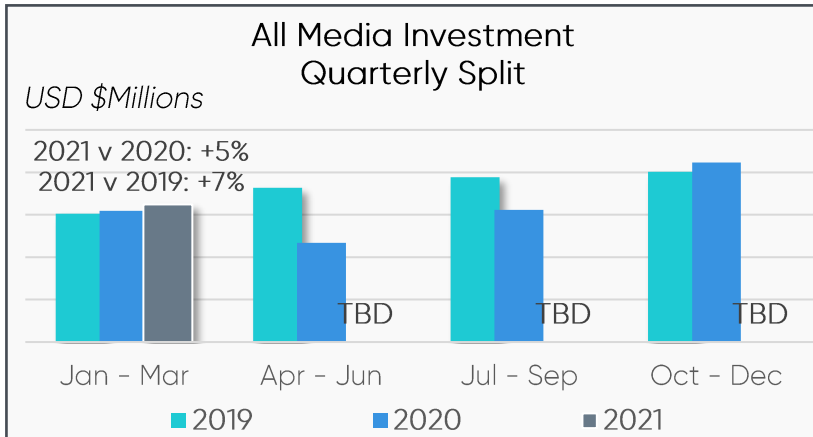
CANADA REACHED +20% GROWTH IN MARCH YOY, RIVALING THE +22% LIFT SEEN IN THE US. HOUSEHOLD SUPPLIES GREW AD SPEND BY ROUGHLY 2.5X YOY – THE STRONGEST LIFT OF ANY MARKET.



WITH THE HIGHEST +5% Q1 LIFT YOY, ONLY NEW ZEALAND EXPANDED DIGITAL AND TV DURING Q1 YOY. NZ ALSO UNIQUELY IMPROVED MONTHLY AD SPEND VS 2020 & 2019 ALIKE. UTILITIES LED TOP-CATEGORY GROWTH, NEARING +50%.



NZ



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