



International Markets Report: Calendar-Year Q1-Q3 2024



USA



UK



CN



AUS



CAN



NZ



Report Coverage

Source: Guideline Spend - Powered by Standard Media Index
Core and Core 2.0 (i.e., Pool data)

MARKETS COVERED

Core 2.0



USA

Core



CN

Core



UK

Guideline International Pool ad spend reflects billings data from major & multiple leading independent agencies across markets.



CAN

Core 2.0



AUS

Core



NZ

Core

MEDIA COVERED



TV



Radio



Magazines



Newspapers

Excludes Market Type: International for each market

Excludes Media Subtypes/Ad Types containing Ad Tech / Fees & Production

Data pulled as of Dec 3, 2024 - subject to future bounce (i.e., slight movement as agency billings data continues to settle)



Outdoor



Cinema



Digital

International Markets Report: Q1-Q3 2024

Globally, Guideline International Pool advertisers grew media spend +6% YoY in Q1-Q3 2024.

Media spend rose consistently across the quarters, with single-digit YoY growth of +6% in Q1, +4% in Q2, and +8% in Q3.

Notably, Q3 achieved +11% growth in Q1-Q3 2024 vs. Q1-Q3 2022.

The US, UK, and Canada markets recorded growth of +7% YoY, +8% YoY, and +8% YoY respectively in Q1-Q3 2024.

In contrast, overall annual media spend in China and New Zealand declined for the second consecutive year.

Australia marketers invested similar media spend volume as same period last year.

Advertisers increased Digital media spend +12% in Q1-Q3 2024 across the Guideline International Pool, thanks to double-digit Digital spend growth in the US, UK, and Canada.

In Australia, Digital investment stood at +6% YoY.

Out of Home grew +6% YoY, the only other growth channel.

In Guideline International Pool, Travel advertisers drove robust media spend increases across most markets over the past two years

CPG, Financial Services, and Restaurants also expanded investments in most regions.

Conversely, Entertainment & Media media spend declined in most markets.



USA



CN



UK



AUS



CAN



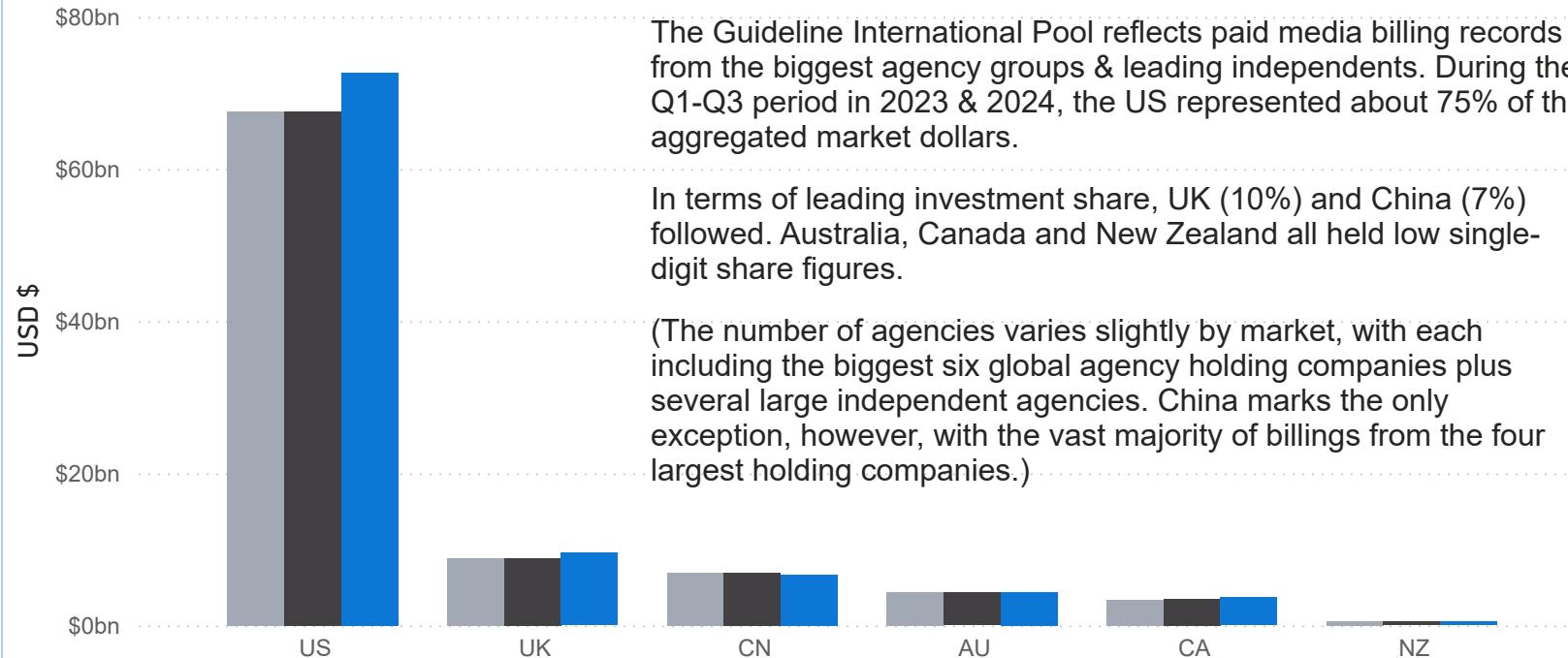
NZ

Globally, Guideline International Pool media spend increased +6% YoY in Q1-Q3 2024, reaching a total of \$97 billion. The US, UK, and Canada markets all achieved high single-digit growth in media spend, while New Zealand was the sole market to register a double-digit decline.

International Markets
Grand Total (Q1-Q3)
\$97bn

USD \$ (Gross) by Market and Time Period

Time Period ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

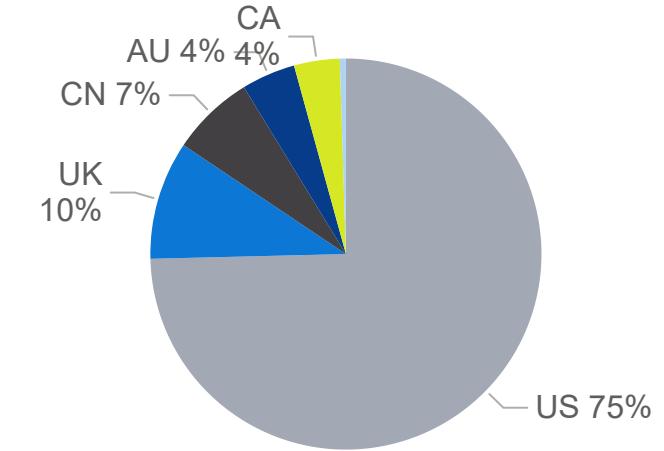


The Guideline International Pool reflects paid media billing records from the biggest agency groups & leading independents. During the Q1-Q3 period in 2023 & 2024, the US represented about 75% of the aggregated market dollars.

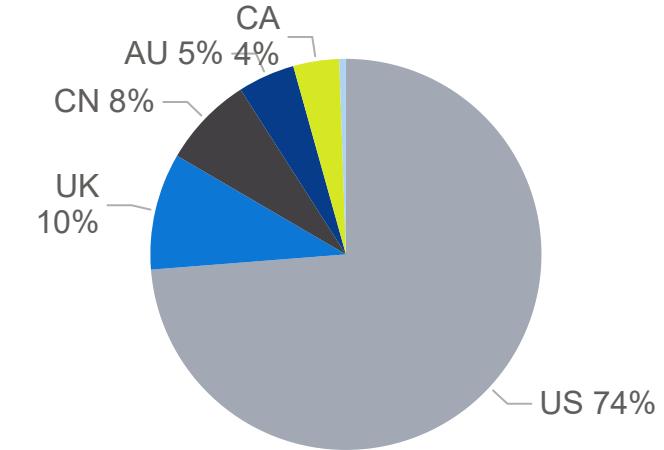
In terms of leading investment share, UK (10%) and China (7%) followed. Australia, Canada and New Zealand all held low single-digit share figures.

(The number of agencies varies slightly by market, with each including the biggest six global agency holding companies plus several large independent agencies. China marks the only exception, however, with the vast majority of billings from the four largest holding companies.)

Q1-Q3 2024: Share of Guideline Int'l Pool



Q1-Q3 2023: Share of Guideline Int'l Pool

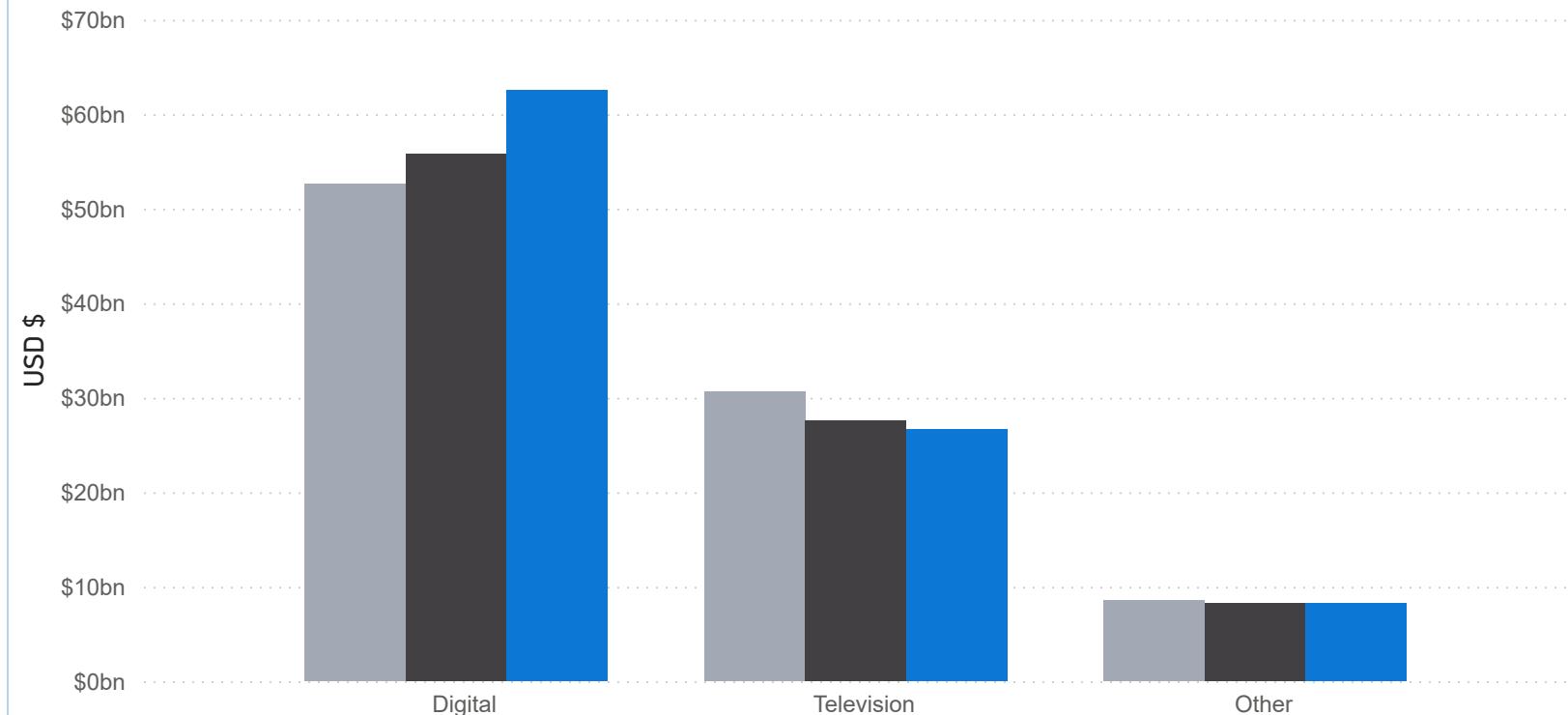


Marketers in Guideline International Pool increased Digital media spend +12% YoY in Q1-Q3 2024, while Linear TV spend declined more modestly at -4% YoY compared to the same period in 2023. Consequently, Digital media accounted for 64% of the overall media mix in Q1-Q3 2024, up from 61% in the previous year.

International Markets
Grand Total (Q1-Q3)
\$97bn

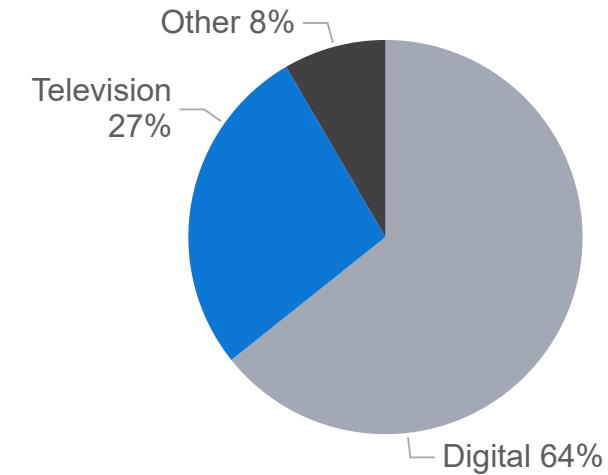
USD \$ by Media and Time Period

Time Period ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

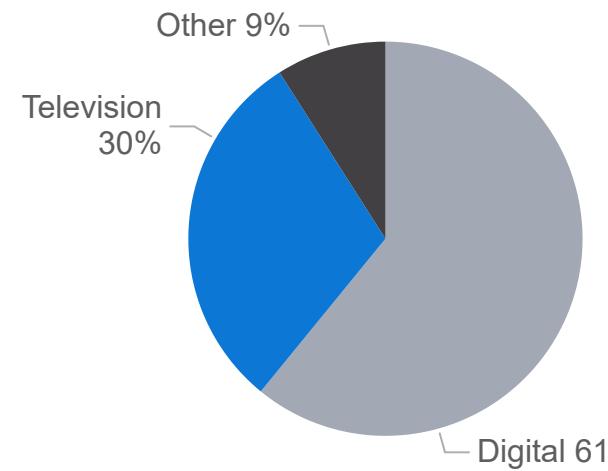


Q1-Q3	2022 Spend	2023 Spend	2024 Spend	2024 vs. 2023 % Change	2024 vs. 2022 % Change
Digital	\$52.6bn	\$55.8bn	\$62.6bn	12.1%	19.0%
Television	\$30.6bn	\$27.6bn	\$26.6bn	-3.5%	-13.2%
Other	\$8.5bn	\$8.3bn	\$8.2bn	-1.1%	-3.6%
Total	\$91.7bn	\$91.6bn	\$97.3bn	6.2%	6.2%

Q1-Q3 2024: Media Mix



Q1-Q3 2023: Media Mix



Source: Guideline Spend – Powered by Standard Media Index

Other includes Media Type = Out of Home/Outdoor, Radio, Magazines, Newspapers, Cinema, Other

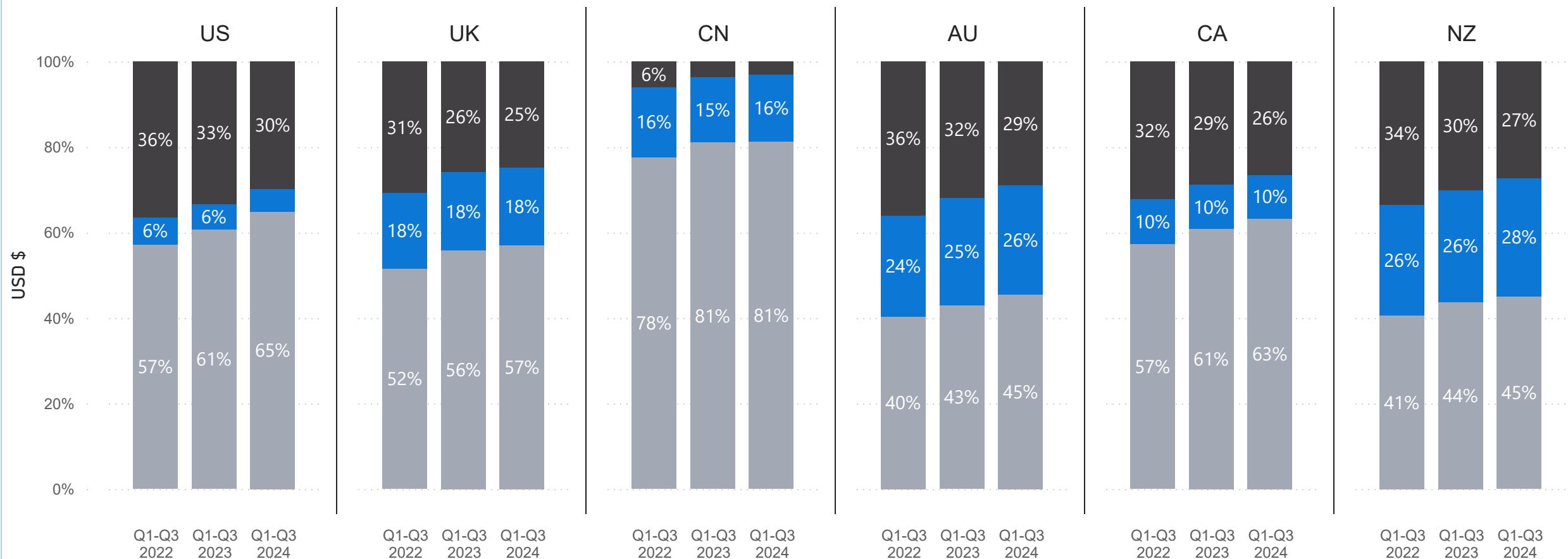
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The pace of dollars shifting to Digital media varies by geo. Advertisers in China led the way in prioritizing Digital media, followed closely by those in the US and Canada. Meanwhile, companies in Australia and New Zealand continued to allocate a significant share of their budgets to "Other" media channels, including Out of Home, Print, and Radio.

International Markets
Grand Total (Q1-Q3)
\$97bn

USD \$ by Time Period, Media and Market

Media ● Digital ● Other ● Television



Source: Guideline Spend – Powered by Standard Media Index

Other includes Media Type = Out of Home/Outdoor, Radio, Magazines, Newspapers, Cinema, Other

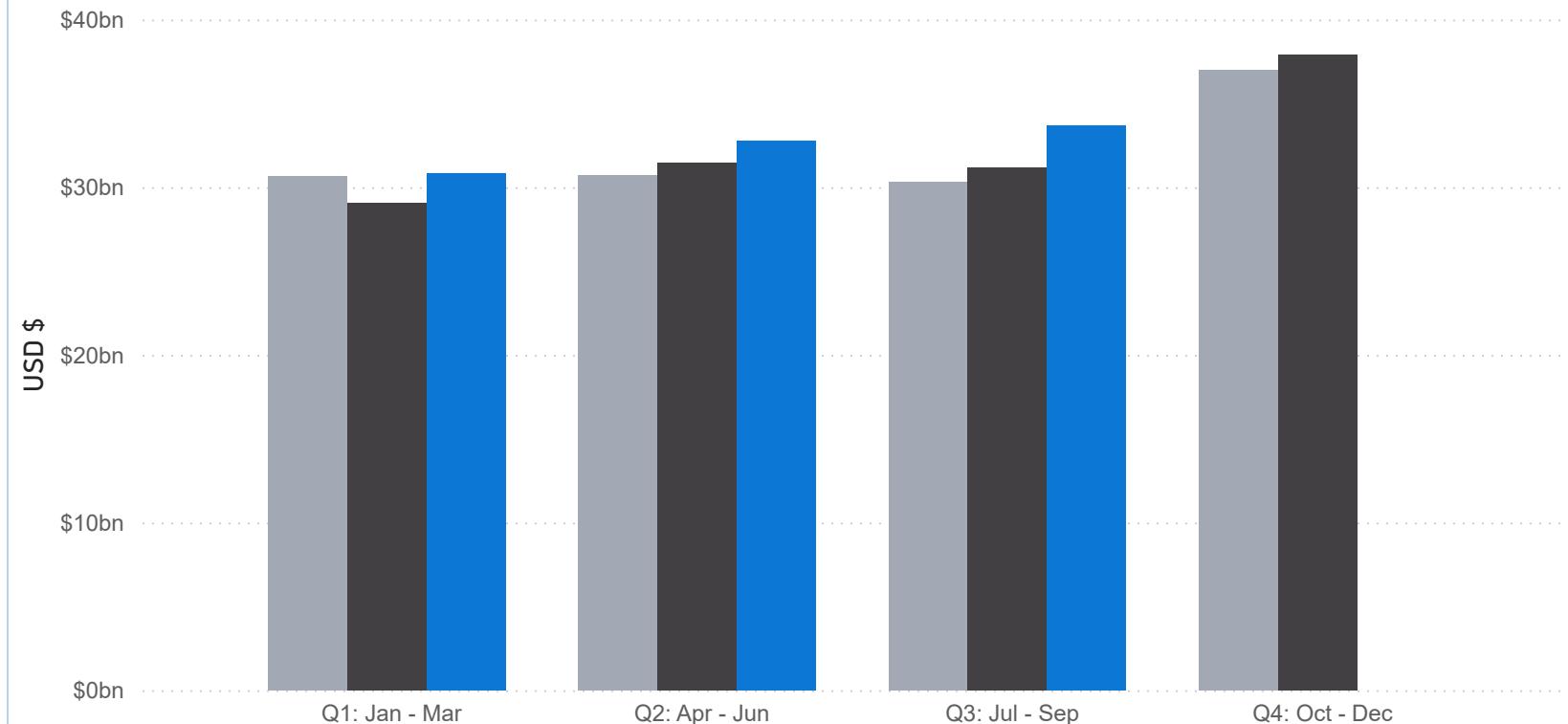
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In Q1-Q3 2024, Guideline International Pool advertisers consistently increased media spend across all quarters compared to the same periods in 2023. Notably, Q3 2024 outpaced Q2—a reversal of the trend seen in both 2022 and 2023.

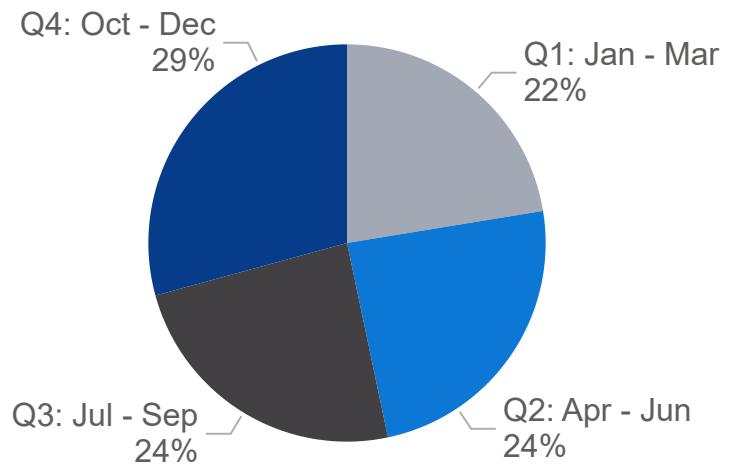
International Markets
Grand Total (Q1-Q3)
\$97bn

USD \$ by Quarter and Year

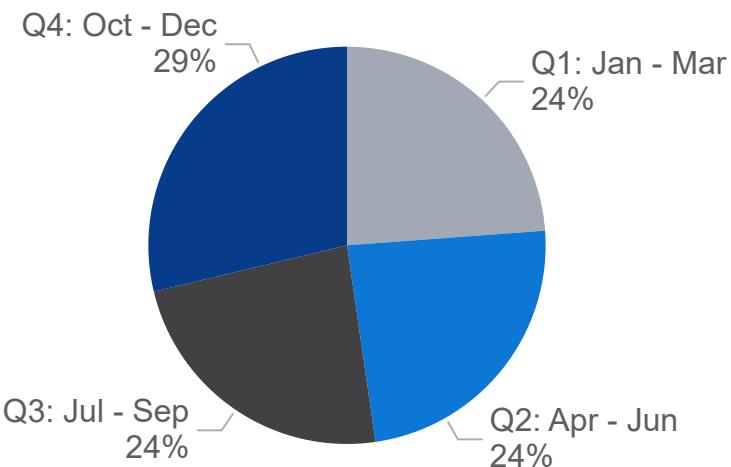
Year ● 2022 ● 2023 ● 2024



Cal-Year 2023: Quarterly Allocation



Cal-Year 2022: Quarterly Allocation

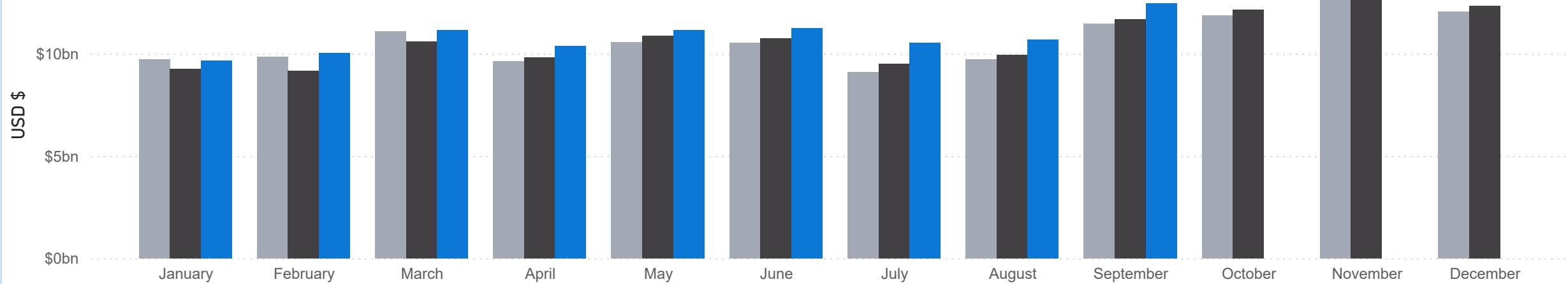


The Guideline International Pool saw consistent media spend increases across all nine months of Q1-Q3 2024, with most months also surpassing 2022 levels, except for January's slight dip of -0.5%. July and February recorded the fastest YoY growth during Q1-Q3 2024.

International Markets
Grand Total (Q1-Q3)
\$97bn

USD \$ by Month and Year

Year ● 2022 ● 2023 ● 2024



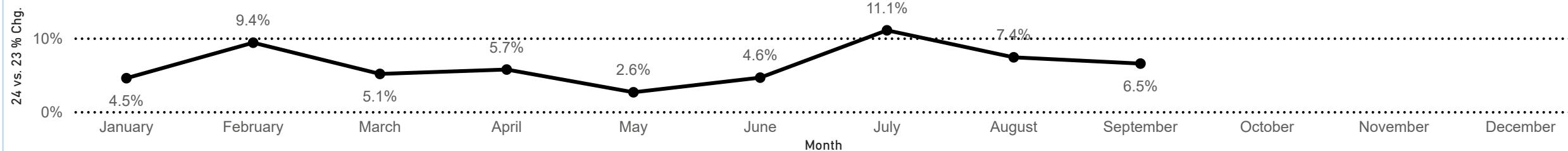
Month	2022 Spend	2023 Spend	2024 Spend	2024 vs. 2023 % Change	2024 vs. 2022 % Change
January	\$9.7bn	\$9.3bn	\$9.7bn	4.5%	-0.5%
February	\$9.8bn	\$9.2bn	\$10.0bn	9.4%	1.9%
March	\$11.1bn	\$10.6bn	\$11.1bn	5.1%	0.5%
April	\$9.6bn	\$9.8bn	\$10.4bn	5.7%	7.7%
May	\$10.6bn	\$10.9bn	\$11.2bn	2.6%	5.6%
June	\$10.5bn	\$10.8bn	\$11.3bn	4.6%	6.8%
July	\$9.1bn	\$9.5bn	\$10.5bn	11.1%	15.9%
August	\$9.7bn	\$10.0bn	\$10.7bn	7.4%	9.9%
September	\$11.5bn	\$11.7bn	\$12.5bn	6.5%	8.6%
October	\$11.9bn	\$12.2bn			
November	\$13.1bn	\$13.4bn			
December	\$12.0bn	\$12.3bn			

In Q1-Q3 2024, US advertisers increased investments YoY in every month. In UK market, media spend surged in May and June, while China recorded growth mainly in Q1. Australia's YoY growth rates showed slight fluctuations across months, whereas New Zealand experienced declines throughout all nine months.

International Markets
Grand Total (Q1-Q3)
\$97bn

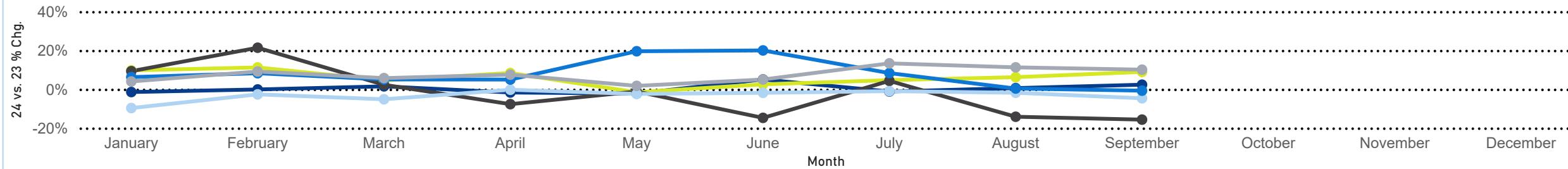
24 vs. 23 % Chg. by Month and Total Market Group

Total Market Group ● International Markets Total



24 vs. 23 % Chg. by Month and Market

Market ● AU ● CA ● CN ● NZ ● UK ● US



2024 vs. 2023 % Change

Market	January	February	March	April	May	June	July	August	September	October	November	December	Total
UK	6.3%	8.3%	5.1%	5.0%	19.6%	20.0%	8.3%	0.4%	-0.7%				7.7%
US	4.0%	9.1%	5.7%	7.5%	1.7%	5.0%	13.3%	11.3%	10.1%				7.5%
CA	9.7%	11.2%	4.6%	8.4%	-1.6%	2.5%	4.7%	6.2%	8.9%				5.8%
AU	-1.4%	-0.1%	1.5%	-1.7%	-2.2%	5.1%	-1.2%	0.6%	2.3%				0.5%
NZ	-9.7%	-2.6%	-5.2%	-0.3%	-2.4%	-1.8%	-1.0%	-1.8%	-4.7%				-3.1%
CN	9.3%	21.4%	2.3%	-7.7%	-1.2%	-14.7%	4.3%	-14.2%	-15.6%				-3.2%
Total	4.5%	9.4%	5.1%	5.7%	2.6%	4.6%	11.1%	7.4%	6.5%				6.2%

Source: Guideline Spend – Powered by Standard Media Index

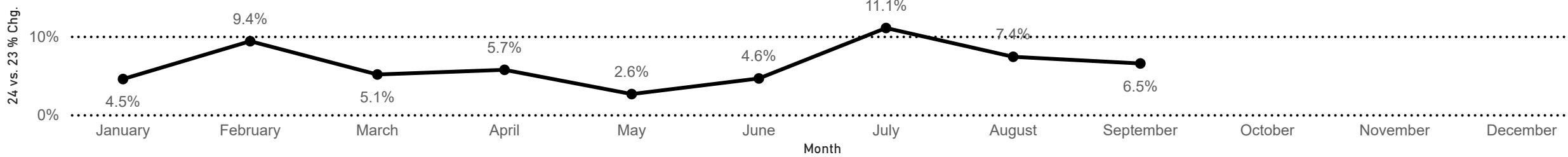
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In the Guideline International Pool, Digital spend rose steadily between Q1-Q3 2024, with most months achieving double-digit growth. Linear TV spend declined between January and July, gaining in July and August. Investment in "Other" channels saw growth during the first four months before turning negative in the latter part of the period.

International Markets Grand Total (Q1-Q3)
\$97bn

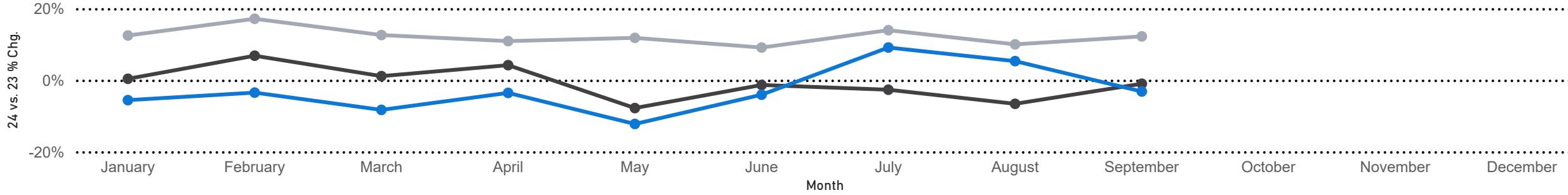
24 vs. 23 % Chg. by Month and Total Market Group

Total Market Group ● International Markets Total



24 vs. 23 % Chg. by Month and Media

Media ● Digital ● Other ● Television



2024 vs. 2023 % Change

Media	January	February	March	April	May	June	July	August	September	October	November	December	Total
Digital	12.5%	17.2%	12.6%	10.9%	11.8%	9.1%	14.0%	10.0%	12.3%				12.1%
Other	0.4%	6.9%	1.1%	4.2%	-7.8%	-1.3%	-2.7%	-6.6%	-1.0%				-1.1%
Television	-5.6%	-3.5%	-8.3%	-3.5%	-12.2%	-4.0%	9.1%	5.3%	-3.2%				-3.5%
Total	4.5%	9.4%	5.1%	5.7%	2.6%	4.6%	11.1%	7.4%	6.5%				6.2%

Source: Guideline Spend – Powered by Standard Media Index

Other includes Media Type = Out of Home/Outdoor, Radio, Magazines, Newspapers, Cinema, Other

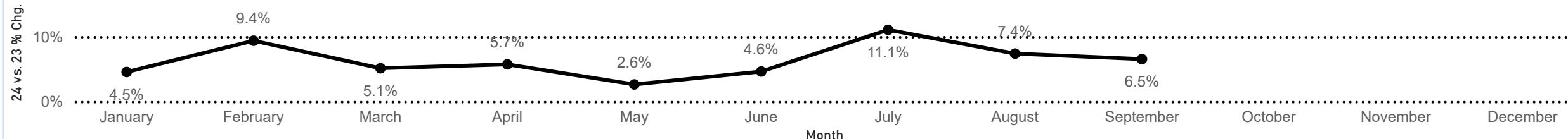
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Guideline International Pool advertisers increased Digital spend +12% in Q1-Q3 2024, marking it as the leading growth driver. Out of Home was the only other Media Type to record positive growth, rising +6%. All other Media Types saw declines in media spend during the period.

International Markets
Grand Total (Q1-Q3)
\$97bn

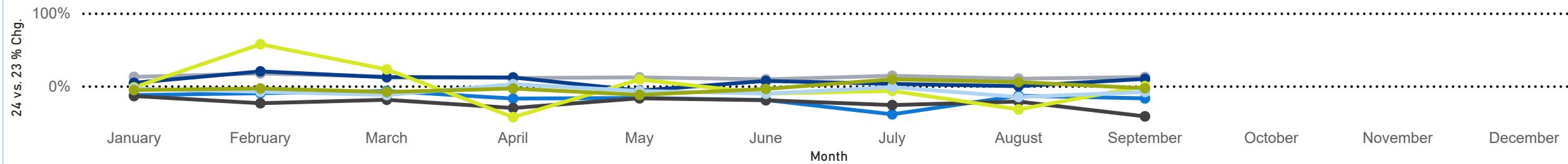
24 vs. 23 % Chg. by Month and Total Market Group

Total Market Group ● International Markets Total



24 vs. 23 % Chg. by Month and Media Type

Media Type ● Digital ● Magazines ● Newspapers ● OOH / CIN ● Other ● Radio ● Television



2024 vs. 2023 % Change

Media Type	January	February	March	April	May	June	July	August	September	October	November	December	Total
Digital	12.5%	17.2%	12.6%	10.9%	11.8%	9.1%	14.0%	10.0%	12.3%				12.1%
OOH / CIN	4.3%	20.0%	12.0%	11.7%	-6.4%	6.9%	2.9%	-0.3%	9.7%				6.1%
Other	-2.0%	57.2%	22.8%	-42.8%	8.9%	-10.5%	-6.8%	-32.2%	-0.3%				-2.3%
Television	-5.6%	-3.5%	-8.3%	-3.5%	-12.2%	-4.0%	9.1%	5.3%	-3.2%				-3.5%
Radio	-3.7%	-8.0%	-12.4%	2.4%	-6.8%	-10.5%	-1.6%	-15.2%	-8.3%				-7.4%
Magazines	-12.5%	-9.9%	-6.9%	-17.3%	-16.4%	-19.3%	-38.9%	-13.4%	-17.0%				-16.9%
Newspapers	-13.8%	-23.7%	-18.9%	-30.3%	-16.9%	-19.6%	-26.3%	-21.4%	-41.7%				-24.5%
Total	4.5%	9.4%	5.1%	5.7%	2.6%	4.6%	11.1%	7.4%	6.5%				6.2%

Source: Guideline Spend – Powered by Standard Media Index

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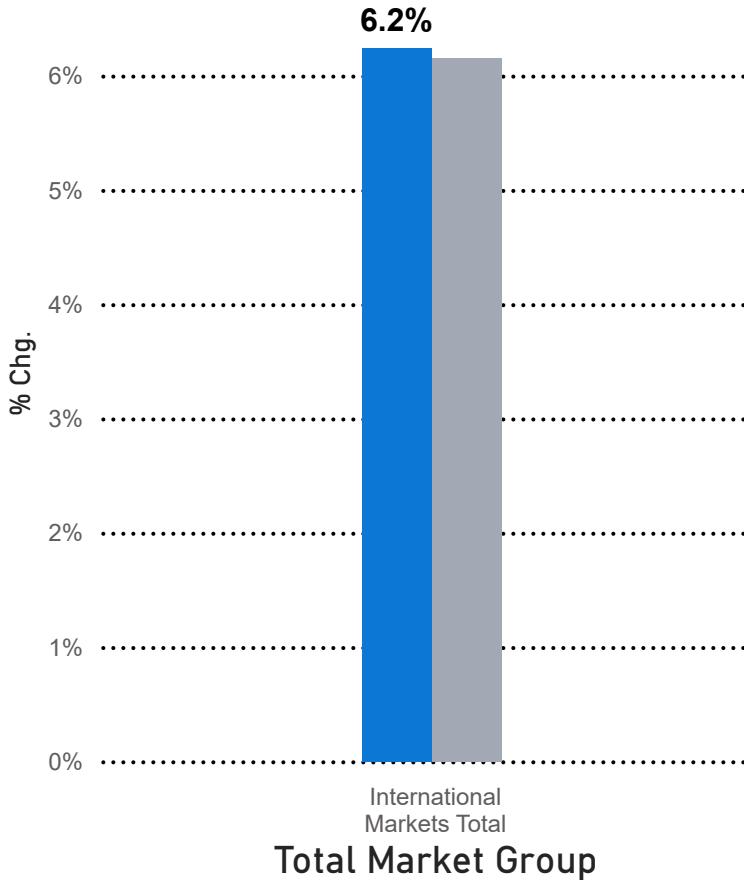
Within the Guideline International Pool, investment gains in Digital and Out of Home both increased media spend for two consecutive years. Declines recorded in all the other media sectors.

International Markets
Grand Total (Q1-Q3)
\$97bn

Q1-Q3

Total Ad Spend % Change Comparison

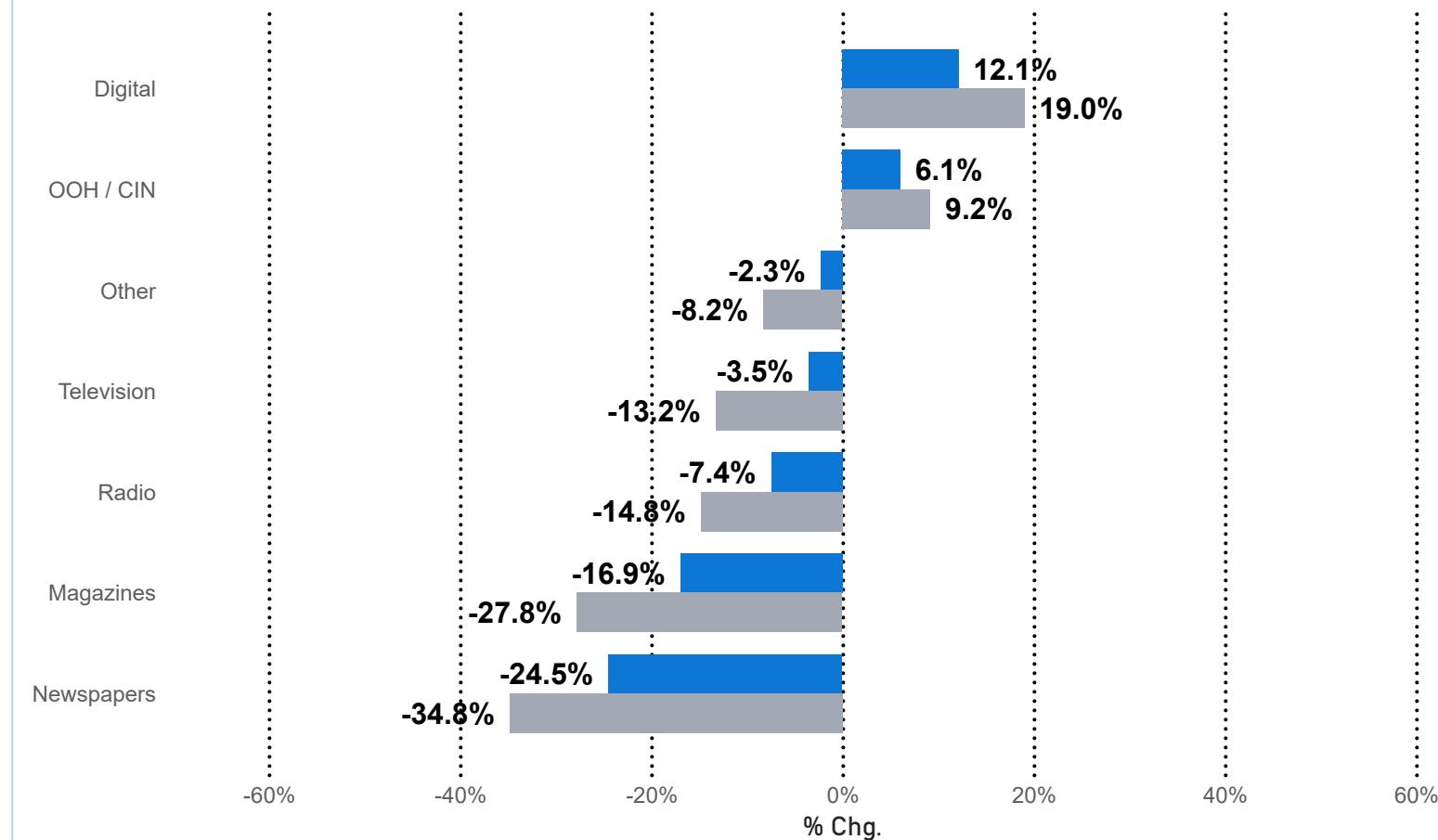
● 2024 vs. 2023 % Change ● 2024 vs. 2022 % Change



Q1-Q3

Ad Spend % Change Comparison by Media Type

● 2024 vs. 2023 % Change ● 2024 vs. 2022 % Change



In Q1-Q3 2024, most Digital media sectors spend grew over the past two years, with notable gains in Retail Media, Audio, Ad Networks/Exchanges, Social, and Search. However, investments in Video and Content Publishers both declined.

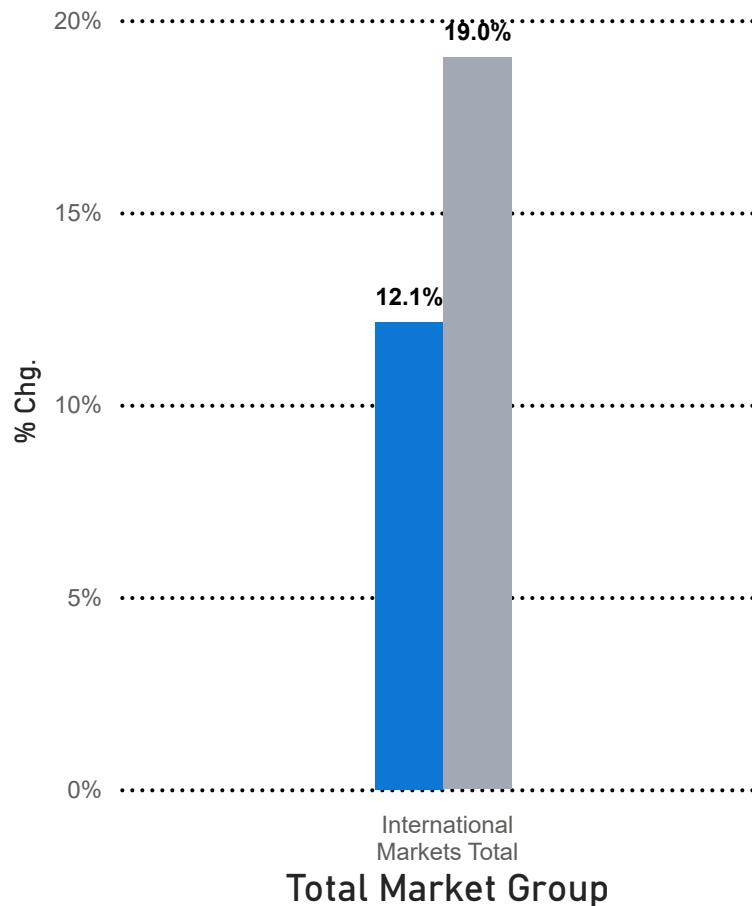


International Markets
Digital Total (Q1-Q3)
\$63bn

Q1-Q3

Total Digital Ad Spend % Change Comparison

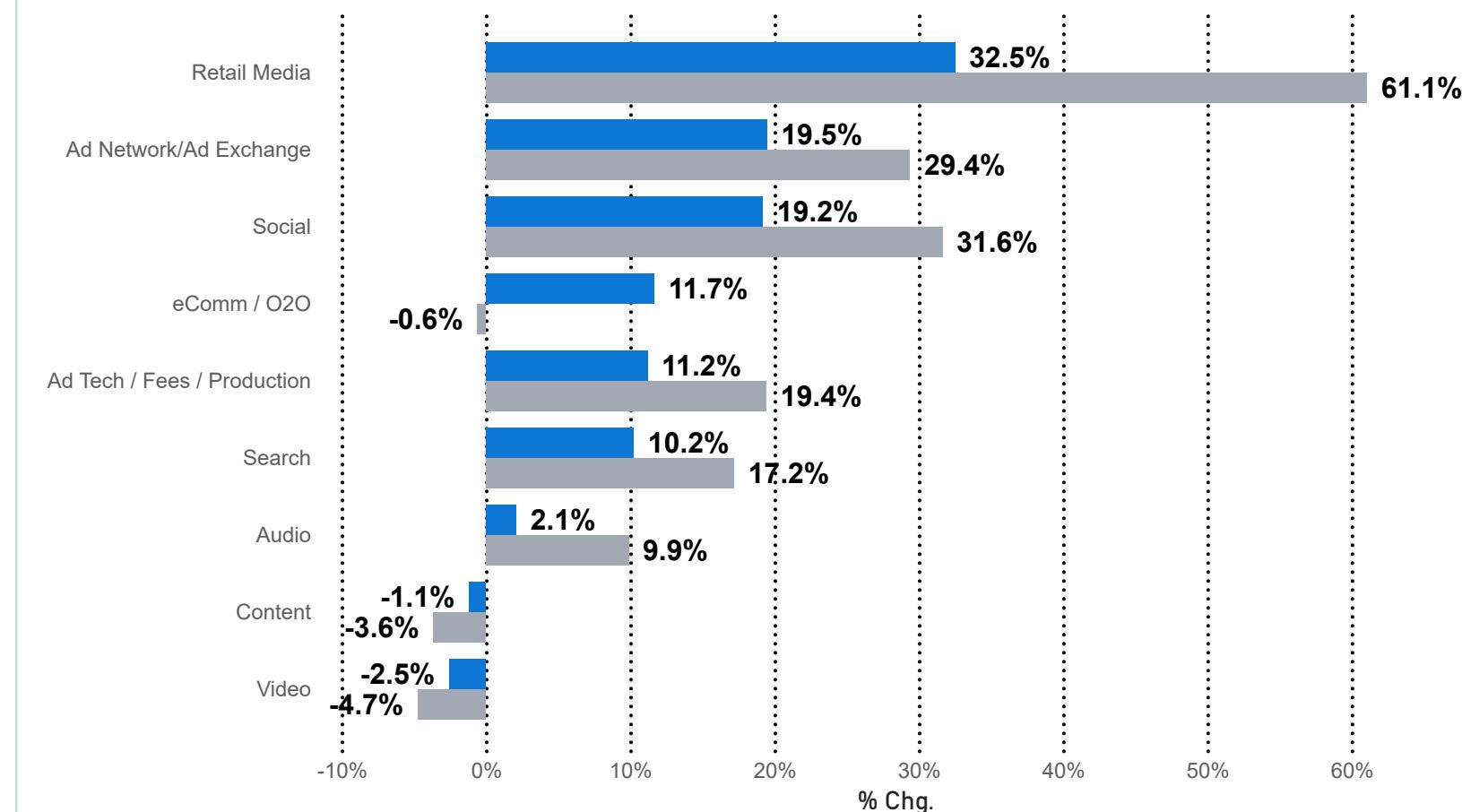
● 2024 vs. 2023 % Change ● 2024 vs. 2022 % Change



Q1-Q3

Digital Ad Spend % Change Comparison by Media Subtype (Site Category)

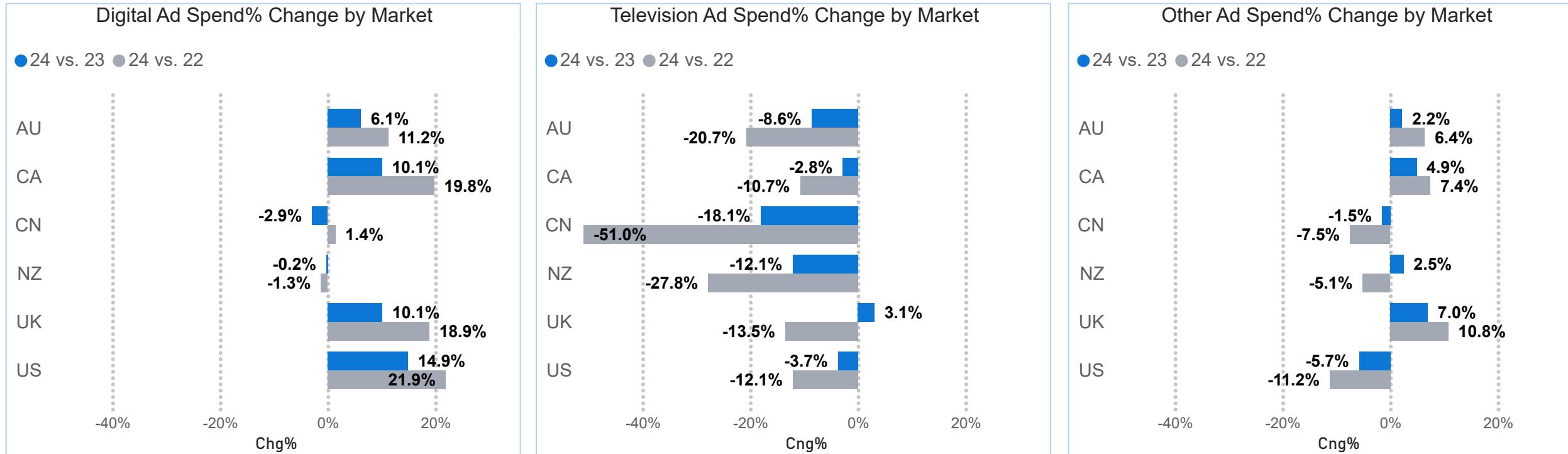
● 2024 vs. 2023 % Change ● 2024 vs. 2022 % Change



The US market led in Digital media spend growth, with +15% YoY lift in Q1-Q3 2024. In contrast, Linear TV spend saw significant decline, most notably in China, which fell -18% YoY, followed by New Zealand dropping -12% YoY over the same period.

International Markets
Grand Total (Q1-Q3)
\$97bn

Q1-Q3



Source: Guideline Spend – Powered by Standard Media Index

Other includes Media Type = Out of Home/Outdoor, Radio, Magazines, Newspapers, Cinema, Other

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Out of Home spend grew across all countries in Q1-Q3 2024 compared to the previous year. In contrast, Print media—including Newspapers and Magazines—already a minor part of the media mix, experienced double-digit declines YoY across all markets.

International Markets
Grand Total (Q1-Q3)
\$97bn

Q1-Q3

Ad Spend % Change Comparison by Media Type

Market	AU	CA	CN	NZ	UK	US	Total					
Media Type	24 vs. 23	24 vs. 22										
Digital	6.1%	11.2%	10.1%	19.8%	-2.9%	1.4%	-0.2%	-1.3%	10.1%	18.9%	14.9%	21.9%
OOH / CIN	7.5%	24.2%	10.5%	25.9%	1.5%	-4.5%	9.3%	8.4%	13.5%	28.2%	3.8%	3.2%
Other	-8.1%	-26.8%	-63.1%	-56.2%			-56.7%	-68.1%	29.4%	15.8%	-3.0%	33.0%
Television	-8.6%	-20.7%	-2.8%	-10.7%	-18.1%	-51.0%	-12.1%	-27.8%	3.1%	-13.5%	-3.7%	-12.1%
Radio	-2.6%	-8.5%	4.3%	0.9%	-44.6%	-74.9%	-2.0%	-15.8%	6.5%	2.0%	-14.5%	-22.3%
Magazines	-11.1%	-8.0%	-14.6%	-41.6%	-16.8%	-15.8%	-22.2%	-37.1%	-10.0%	-19.5%	-18.9%	-32.7%
Newspapers	-11.9%	-27.1%	-39.3%	-55.0%	-37.3%	-43.4%	-14.3%	-29.6%	-16.6%	-24.7%	-40.2%	-48.9%
Total	0.5%	-1.4%	5.8%	8.7%	-3.2%	-3.2%	-3.1%	-11.2%	7.7%	7.5%	7.5%	7.4%
											6.2%	6.2%

In Q1-Q3 2024, advertisers in the US, UK, and Australia achieved YoY growth across all Digital channels. By contrast, China declined in most Digital channels, with Social and Mobile being the sole exception. Meanwhile, New Zealand and Canada saw declines in only one Digital media channel each.



International Markets
Digital Total (Q1-Q3)

\$63bn

Q1-Q3

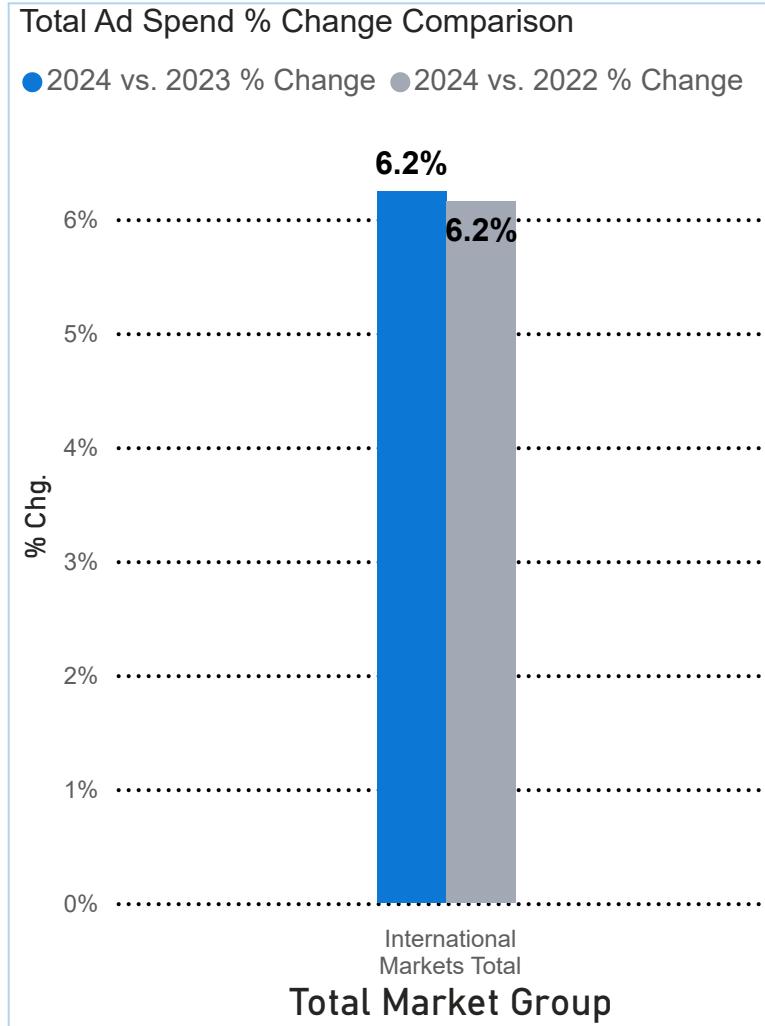
Digital Ad Spend % Change Comparison by Media Subtype (Site Category)

Market	AU	CA	CN	NZ	UK	US	Total					
Media Subtype (Site Category)	24 vs. 23	24 vs. 22										
Retail Media	4.8%	3.8%	10.6%	24.6%	-4.8%	3.6%	-11.5%	-8.7%	11.2%	18.2%	32.5%	61.1%
Ad Network/Ad Exchange	11.9%	14.8%	15.9%	22.3%	3.5%	28.9%	10.4%	15.4%	15.3%	28.4%	23.0%	33.7%
Social					11.7%	-0.6%					25.7%	34.6%
eComm / O2O												19.5%
Ad Tech / Fees / Production			18.8%	27.0%							11.1%	19.3%
Search	2.2%	9.6%	6.2%	17.8%	-14.2%	-28.3%	1.5%	3.0%	5.5%	12.3%	13.1%	20.9%
Audio			5.4%	17.7%					3.2%	11.2%	1.9%	9.6%
Content	0.2%	-0.5%	-4.3%	2.8%	-19.7%	-33.4%	1.9%	-6.8%	11.7%	23.7%	0.8%	-0.4%
Video	24.2%	69.2%	41.6%	8.2%	-9.3%	-16.0%	36.5%	9.5%	9.7%	16.4%	-3.9%	-6.6%
											-2.5%	-4.7%

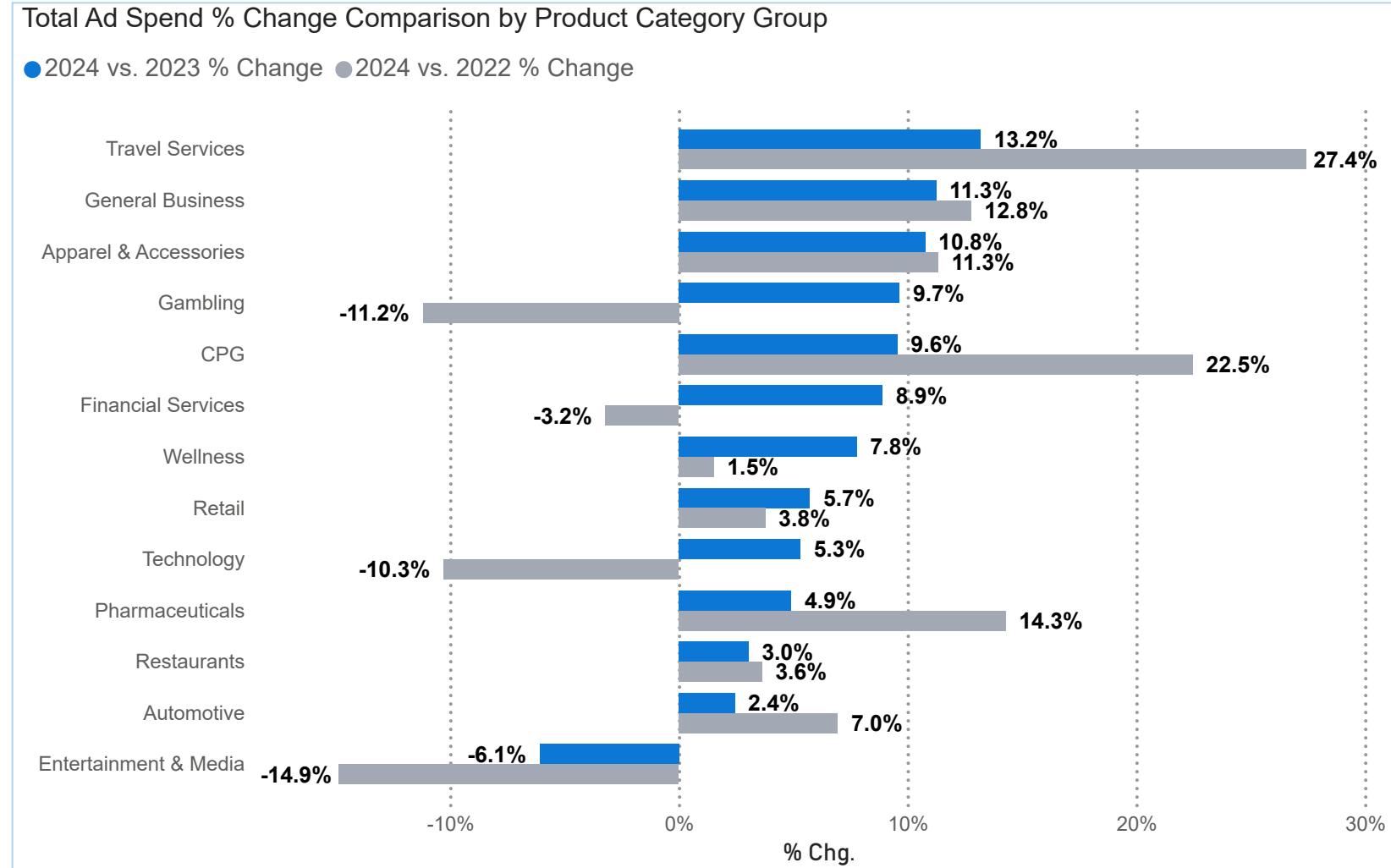
Guideline International Pool advertisers across most Product Category Groups increased media spend YoY in Q1-Q3 2024. Gambling, Financial Services, and Technology returned to growth after declines in 2023, while Entertainment & Media continued to contract, marking its second consecutive year of decline.

International Markets
Grand Total (Q1-Q3)
\$97bn

Q1-Q3



Q1-Q3



Travel Services advertisers in the Chinese market doubled media spend in Q1-Q3 2024. In US, most Product Category Groups increased media spend, except for Entertainment & Media, while in UK, Technology was the only group to see a decline. In contrast, more than half of the Product Category Groups reduced their spend in the Australian and New Zealand markets.

International Markets
Grand Total (Q1-Q3)
\$97bn

Q1-Q3

Ad Spend % Change Comparison by Product Category Group

Market	AU	CA	CN	NZ	UK	US	Total							
Product Category Group	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22
Travel Services	-0.3%	14.3%	18.6%	6.3%	149.3%	212.4%	5.0%	-10.0%	6.4%	22.2%	14.1%	29.1%	13.2%	27.4%
General Business	-0.1%	-13.3%	-4.1%	-6.1%	-0.3%	-10.7%	-15.9%	-21.5%	3.5%	3.9%	18.6%	26.0%	11.3%	12.8%
Apparel & Accessories	-11.2%	-11.8%	-13.5%	-13.2%	1.0%	6.4%	16.4%	-19.9%	9.1%	29.4%	21.5%	10.4%	10.8%	11.3%
Gambling	-7.3%	-19.7%							23.6%	13.2%	10.0%	-15.8%	9.7%	-11.2%
CPG	9.3%	11.3%	11.7%	22.2%	-1.5%	5.6%	4.7%	-5.5%	19.3%	26.8%	11.1%	27.1%	9.6%	22.5%
Financial Services	2.6%	5.0%	10.5%	-0.3%	-30.7%	-53.6%	17.2%	8.7%	15.9%	2.1%	9.0%	-4.4%	8.9%	-3.2%
Wellness	-7.9%	-22.4%	-2.8%	-9.8%	10.2%	10.3%	-4.7%	-14.9%	12.6%	13.8%	8.4%	1.9%	7.8%	1.5%
Retail	0.8%	1.1%	-6.6%	-6.5%	4.6%	27.9%	-2.9%	-7.9%	6.1%	9.0%	7.2%	3.6%	5.7%	3.8%
Technology	-6.6%	-17.1%	5.8%	0.1%	6.3%	0.6%	-7.7%	-26.9%	-7.8%	-25.0%	7.4%	-9.4%	5.3%	-10.3%
Pharmaceuticals	17.3%	46.5%	7.6%	6.3%	-11.4%	3.7%	-4.3%	-13.4%	16.3%	16.1%	4.8%	14.3%	4.9%	14.3%
Restaurants	2.9%	18.7%	4.7%	13.0%	-22.0%	-19.6%	19.1%	10.5%	0.7%	2.3%	3.8%	3.2%	3.0%	3.6%
Automotive	6.1%	18.6%	14.4%	31.5%	-29.0%	-43.1%	-27.1%	-17.3%	8.5%	30.3%	5.1%	11.8%	2.4%	7.0%
Entertainment & Media	-16.2%	-19.9%	-5.4%	2.4%	12.9%	27.5%	-6.9%	-19.1%	5.5%	-1.8%	-7.6%	-17.6%	-6.1%	-14.9%
Total	0.5%	-1.4%	5.8%	8.7%	-3.2%	-3.2%	-3.1%	-11.2%	7.7%	7.5%	7.5%	7.4%	6.2%	6.2%

CPG remained the largest-spending Product Category Group in most markets to gain share. In Australia and New Zealand, General Business—a category that includes B2B, Utilities, and other services—commanded a significant share of spend. Apparel & Accessories held a leading position uniquely in China.

International Markets
Grand Total (Q1-Q3)
\$97bn

Q1-Q3

Guideline International Pool: Ad Spend % Share Comparison by Product Category Group

Market	AU	CA	CN	NZ	UK	US	Total							
Product Category Group	23 So\$	24 So\$												
CPG	13.7%	14.9%	23.1%	24.4%	50.6%	51.5%	17.3%	18.7%	18.4%	20.4%	20.9%	21.6%	22.6%	23.3%
Technology	6.8%	6.3%	8.1%	8.1%	14.1%	15.5%	6.3%	6.0%	12.0%	10.3%	11.6%	11.6%	11.5%	11.4%
Pharmaceuticals	0.9%	1.1%	2.9%	2.9%	1.0%	0.9%	0.9%	0.9%	1.4%	1.5%	13.2%	12.9%	10.1%	10.0%
Automotive	9.3%	9.8%	14.5%	15.7%	13.3%	9.8%	4.3%	3.3%	6.6%	6.6%	10.2%	9.9%	10.1%	9.8%
General Business	19.7%	19.6%	10.8%	9.8%	2.4%	2.5%	28.7%	24.9%	16.8%	16.1%	6.6%	7.3%	8.2%	8.6%
Financial Services	15.2%	15.5%	11.3%	11.8%	0.5%	0.4%	11.3%	13.6%	6.8%	7.3%	8.5%	8.6%	8.2%	8.4%
Retail	11.8%	11.8%	9.0%	7.9%	1.3%	1.4%	15.7%	15.8%	10.3%	10.2%	7.0%	7.0%	7.3%	7.2%
Entertainment & Media	7.2%	6.0%	7.3%	6.5%	1.3%	1.5%	4.0%	3.8%	9.6%	9.4%	8.5%	7.3%	7.9%	7.0%
Restaurants	4.4%	4.5%	7.2%	7.1%	1.8%	1.5%	4.8%	6.0%	3.1%	2.9%	5.7%	5.5%	5.2%	5.0%
Travel Services	5.1%	5.1%	2.7%	3.1%	0.5%	1.2%	4.4%	4.7%	6.2%	6.1%	3.4%	3.6%	3.5%	3.7%
Apparel & Accessories	1.5%	1.3%	1.6%	1.3%	12.1%	12.6%	0.6%	0.7%	5.9%	6.0%	1.6%	1.8%	2.8%	2.9%
Wellness	1.5%	1.4%	1.5%	1.4%	1.1%	1.3%	1.6%	1.6%	1.2%	1.3%	2.2%	2.2%	1.9%	2.0%
Gambling	3.0%	2.7%							1.6%	1.9%	0.6%	0.6%	0.8%	0.8%
Total	100.0%													

In 1Q-3Q 2024, most advertiser Category Groups expanded media spend significantly in Digital media in the past two years. Gambling, Travel Services, and CPG notably surged in Digital ad spend in the period since 2022.

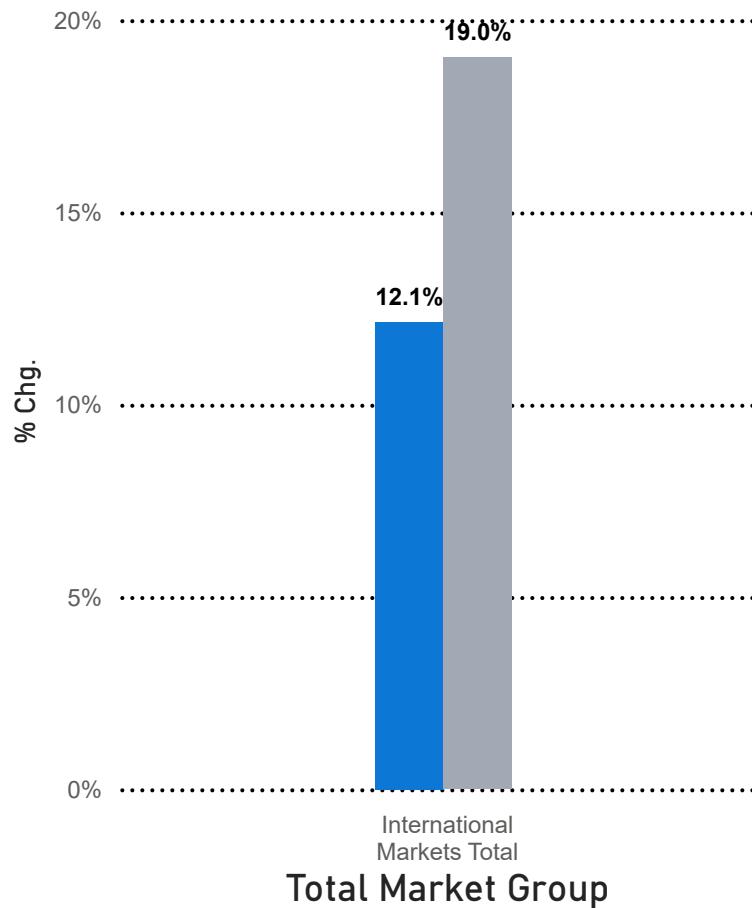


International Markets
Digital Total (Q1-Q3)
\$63bn

Q1-Q3

Total Digital Ad Spend % Change Comparison

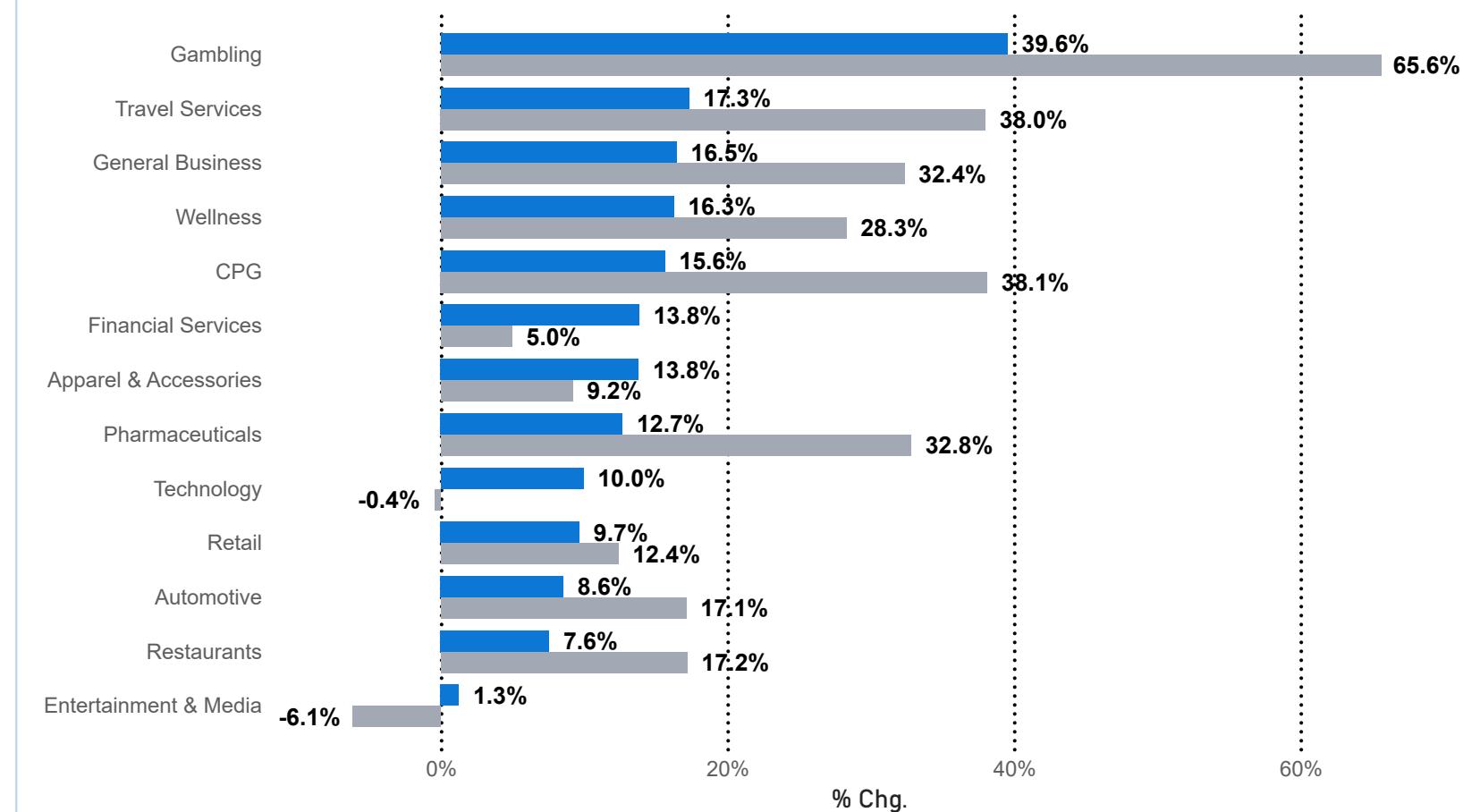
- 2024 vs. 2023 % Change
- 2024 vs. 2022 % Change



Q1-Q3

Digital Ad Spend % Change Comparison by Product Category Group

- 2024 vs. 2023 % Change
- 2024 vs. 2022 % Change



Advertisers in the US and UK increased Digital media spend across most Product Category Groups. Travel Services saw annual Digital spend grow in every market, while Wellness, CPG, Financial Services, and Pharmaceuticals posted gains in most regions. In contrast, Apparel & Accessories reduced spend in the majority of markets.



International Markets
Digital Total (Q1-Q3)

\$63bn

Q1-Q3

Digital Ad Spend % Change Comparison by Category Group

Market	AU	CA	CN	NZ	UK	US	Total							
Product Category Group	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22	24 vs. 23	24 vs. 22
Gambling	14.3%	21.8%					52.1%	68.9%	45.5%	86.7%	39.6%	39.6%	65.6%	
Travel Services	3.4%	21.1%	32.6%	9.6%	100.3%	130.8%	2.0%	-20.8%	8.3%	34.4%	17.8%	40.4%	17.3%	38.0%
General Business	1.3%	2.2%	-6.0%	-3.6%	-0.6%	-11.3%	-13.9%	-5.7%	4.1%	22.3%	25.4%	47.1%	16.5%	32.4%
Wellness	10.4%	-5.6%	-11.4%	-0.6%	5.2%	19.8%	10.1%	11.3%	20.4%	31.2%	17.9%	30.7%	16.3%	28.3%
CPG	22.3%	39.3%	19.9%	43.8%	-2.6%	12.3%	10.0%	12.1%	24.0%	37.8%	20.3%	46.5%	15.6%	38.1%
Financial Services	12.0%	16.7%	13.3%	11.5%	-25.0%	-42.2%	28.1%	27.0%	19.4%	18.2%	13.7%	2.6%	13.8%	5.0%
Apparel & Accessories	-11.3%	-24.1%	-13.4%	-9.6%	-2.2%	-0.5%	15.8%	-7.4%	7.9%	30.6%	33.6%	9.4%	13.8%	9.2%
Pharmaceuticals	37.6%	69.9%	11.9%	16.1%	15.1%	14.5%	-11.9%	1.3%	22.1%	35.8%	12.5%	33.1%	12.7%	32.8%
Technology	-2.4%	-13.7%	12.3%	20.7%	9.7%	2.9%	2.0%	-31.8%	-4.9%	-20.1%	12.4%	1.9%	10.0%	-0.4%
Retail	3.1%	6.7%	-7.6%	-3.9%	-2.2%	25.2%	-7.2%	-8.4%	4.5%	22.0%	12.3%	12.5%	9.7%	12.4%
Automotive	7.9%	20.1%	13.8%	32.3%	-22.2%	-35.4%	-13.2%	1.5%	11.7%	46.2%	13.3%	25.9%	8.6%	17.1%
Restaurants	7.1%	39.1%	17.0%	40.5%	-20.9%	-11.9%	22.9%	31.8%	-5.9%	23.1%	9.4%	16.7%	7.6%	17.2%
Entertainment & Media	-14.2%	-10.7%	0.5%	7.9%	-0.3%	9.7%	-3.2%	-16.7%	18.5%	16.3%	-0.7%	-9.9%	1.3%	-6.1%
Total	6.1%	11.2%	10.1%	19.8%	-2.9%	1.4%	-0.2%	-1.3%	10.1%	18.9%	14.9%	21.9%	12.1%	19.0%

CPG emerged as the leading advertising sector in Canada, China, and the US, while General Business dominated in other markets. The second-largest Product Category Groups varied by region, including Technology, Automotive, General Business, Retail, and Financial Services.



International Markets
Digital Total (Q1-Q3)
\$63bn

Q1-Q3

Digital Ad Spend % Change Comparison by Category Group

Market	AU	CA	CN	NZ	UK	US	Total					
Product Category Group	23 So\$	24 So\$										
Apparel & Accessories	1.3%	1.1%	1.9%	1.5%	10.8%	10.8%	0.7%	0.8%	8.3%	8.1%	1.7%	2.0%
Automotive	9.9%	10.0%	17.5%	18.1%	12.2%	9.7%	4.9%	4.3%	6.8%	6.9%	9.4%	9.3%
CPG	13.2%	15.2%	23.1%	25.2%	53.5%	53.6%	16.1%	17.7%	16.3%	18.3%	23.1%	24.2%
Entertainment & Media	6.8%	5.5%	6.2%	5.7%	1.3%	1.3%	4.6%	4.5%	10.0%	10.7%	7.8%	6.8%
Financial Services	16.8%	17.7%	12.8%	13.1%	0.5%	0.4%	10.9%	13.9%	7.0%	7.6%	8.1%	8.0%
Gambling	1.5%	1.6%							0.5%	0.7%	0.2%	0.2%
General Business	20.4%	19.5%	10.8%	9.2%	2.7%	2.8%	29.0%	25.0%	16.9%	16.0%	7.0%	7.6%
Pharmaceuticals	0.8%	1.0%	2.8%	2.8%	0.8%	0.9%	0.9%	0.8%	1.5%	1.6%	12.0%	11.7%
Restaurants	3.9%	4.0%	4.4%	4.7%	1.8%	1.5%	4.1%	5.1%	2.4%	2.1%	4.9%	4.6%
Retail	11.0%	10.7%	7.9%	6.6%	1.2%	1.2%	18.0%	16.7%	9.0%	8.6%	7.4%	7.3%
Technology	8.1%	7.4%	7.9%	8.1%	13.7%	15.5%	4.7%	4.8%	14.6%	12.6%	12.6%	12.3%
Travel Services	5.3%	5.2%	3.0%	3.6%	0.5%	1.0%	5.0%	5.2%	5.3%	5.2%	3.6%	3.6%
Wellness	1.1%	1.1%	1.7%	1.4%	1.1%	1.2%	1.1%	1.2%	1.4%	1.5%	2.3%	2.4%
Total	100.0%											



Market Placemats

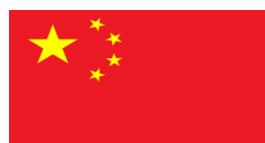
Q1-Q3 2024



USA



UK



CN



AUS



CAN



NZ

US Guideline Pool advertisers increased spend +7% YoY in 1Q-3Q 2024 over both 2023 & 2022, growth occurring during each month in this period. Growth conducted in each month during the period. Digital drove US market lift. Of the Top 10 Product Categories, Personal Care and Household Supplies/Services posted the fastest growth rate.

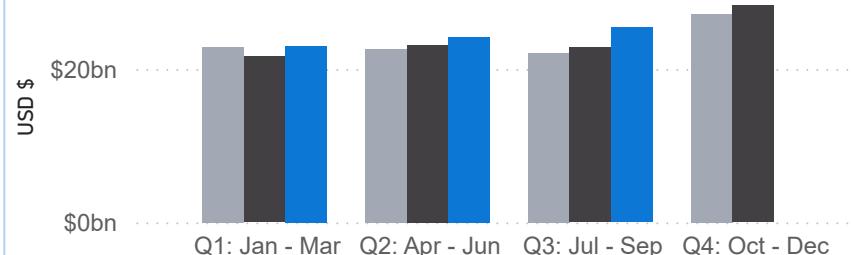


Market Total (Q1-Q3)

\$73bn

USD \$ by Quarter and Cal Year

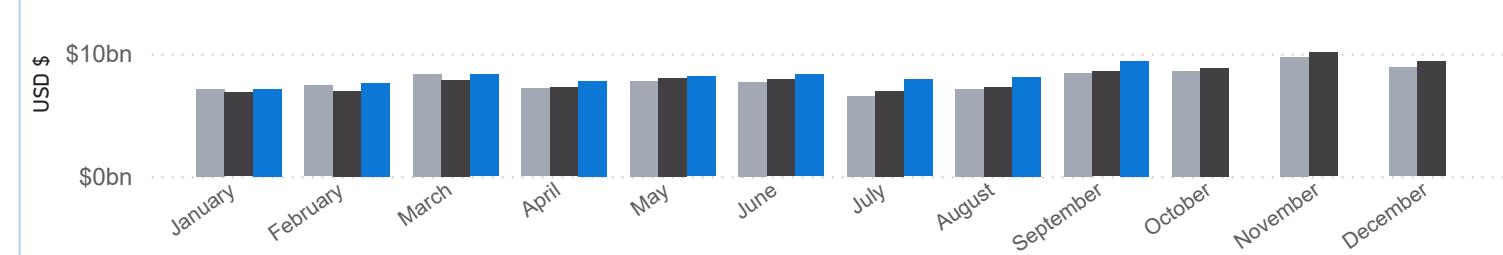
Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



	Qtr 1	Qtr 2	Qtr 3	Total
24 vs. 23 % Chg	6%	5%	11%	7%
24 vs. 22 % Chg	1%	7%	15%	7%

USD \$ by Month and Cal Year

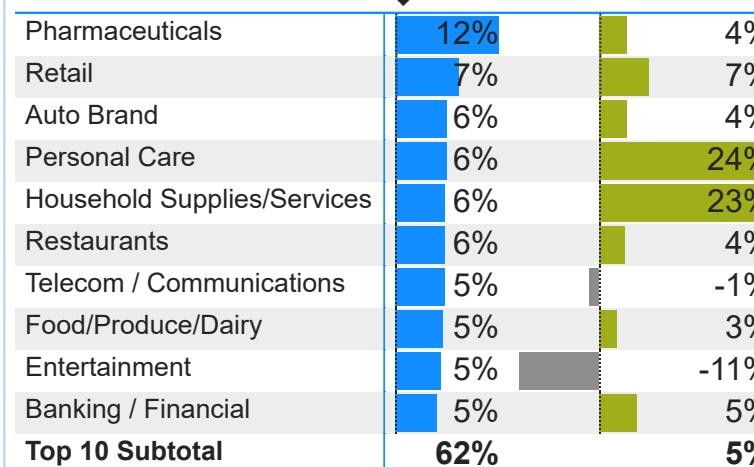
Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



	01	02	03	04	05	06	07	08	09	10	11	12	Total
24 vs. 23 % Chg	4%	9%	6%	8%	2%	5%	13%	11%	10%				-24%
24 vs. 22 % Chg	-0%	2%	-0%	8%	5%	8%	21%	14%	12%				-23%

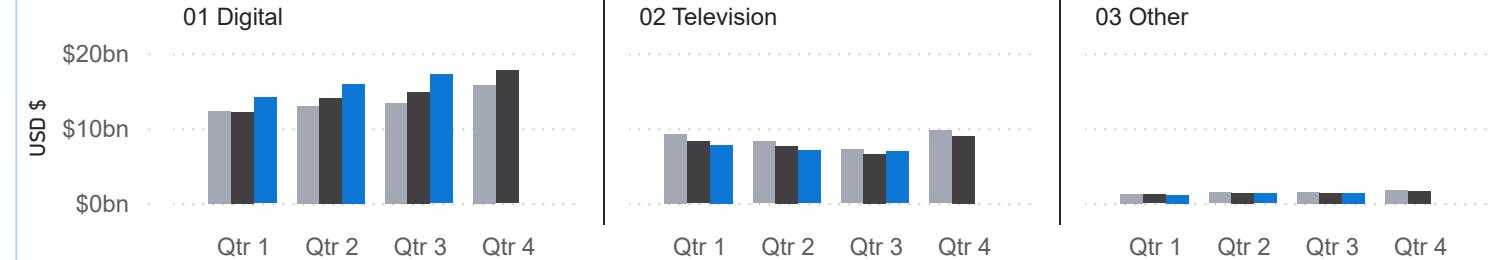
Top 10 Categories (Q1-Q3)

Category 2024 So\$ 2024 vs. 2023 \$ % Chg



USD \$ by Quarter, Cal Year and Media

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



Media	01 Digital			02 Television			03 Other			Total		
	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total
24 vs. 23 % Chg	16%	13%	16%	15%	-6%	-9%	5%	-4%	-4%	-9%	-4%	-6%
24 vs. 22 % Chg	15%	23%	28%	22%	-16%	-15%	-4%	-12%	-13%	-11%	-10%	-11%

UK Guideline Pool advertisers increased media spend by +8% YoY in Q1-Q3 2024 compared to 2023. Most major Product Categories contributed to the growth, with media spend rising in the majority of months. Gains in Digital, Linear TV, and Other media collectively drove the overall increase from the media perspective.

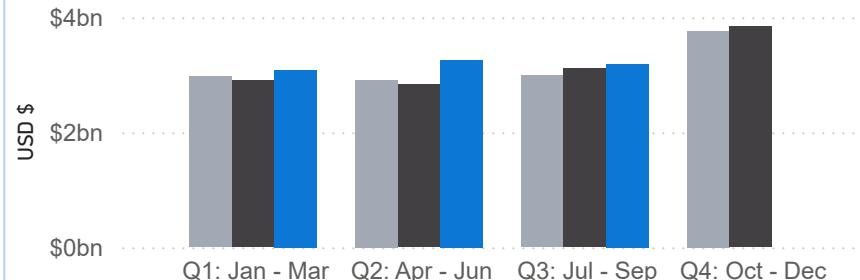


Market Total (Q1-Q3)

\$10bn

USD \$ by Quarter and Cal Year

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

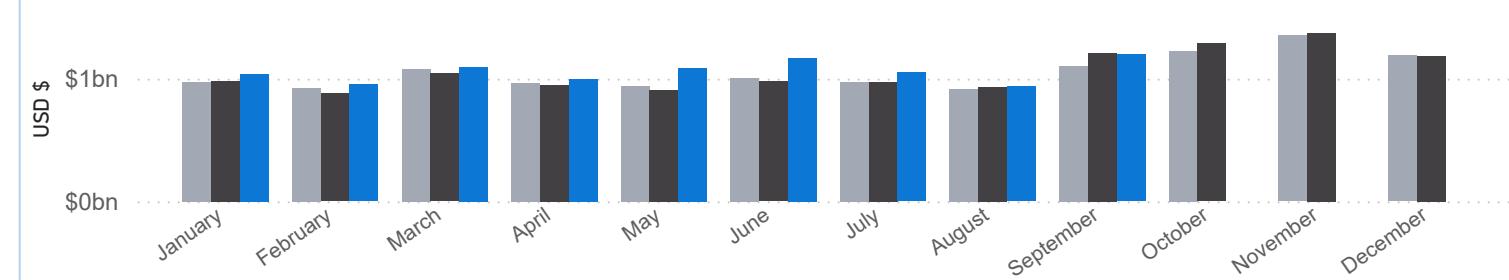


Qtr 1 Qtr 2 Qtr 3 Total

24 vs. 23 % Chg	6%	15%	2%	8%
24 vs. 22 % Chg	4%	12%	7%	7%

USD \$ by Month and Cal Year

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

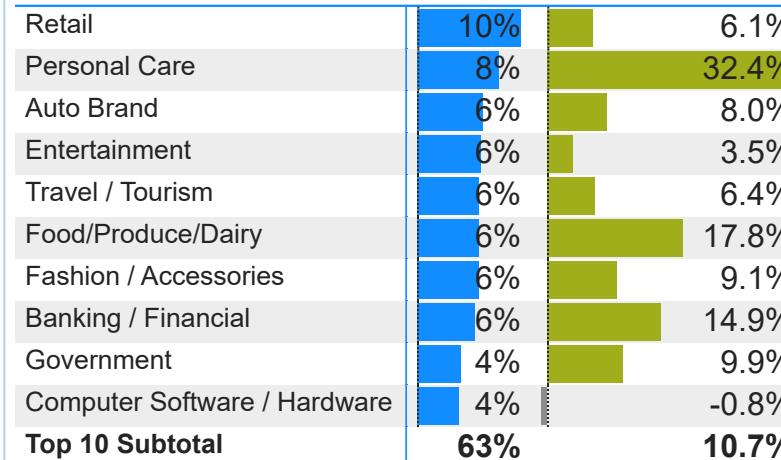


01 02 03 04 05 06 07 08 09 10 11 12 Total

24 vs. 23 % Chg	6%	8%	5%	5%	20%	20%	8%	0%	-1%			-25%
24 vs. 22 % Chg	7%	3%	2%	3%	16%	17%	8%	3%	9%			-25%

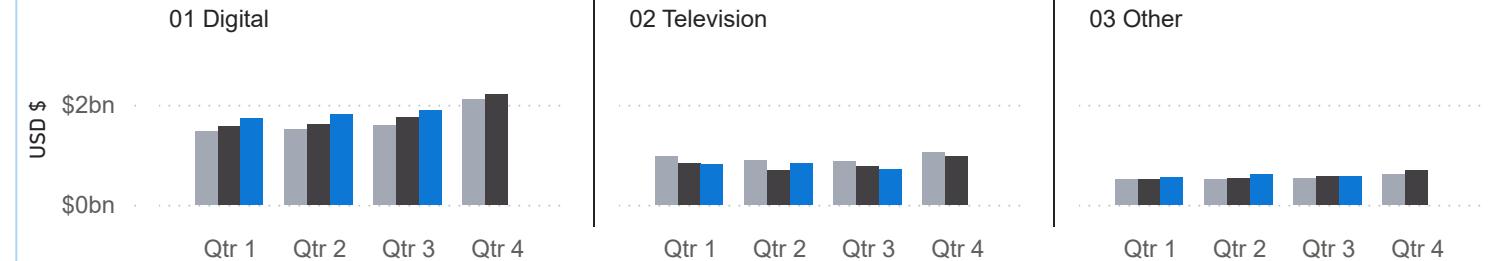
Top 10 Categories (Q1-Q3)

Category 2024 So\$ 2024 vs. 2023 \$ % Chg



USD \$ by Quarter, Cal Year and Media

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



Media	01 Digital	02 Television	03 Other	Total	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total
24 vs. 23 % Chg	10%	13%	8%	10%	-1%	20%	-8%	3%	8%	14%	-1%	7%
24 vs. 22 % Chg	17%	20%	19%	19%	-17%	-6%	-17%	-13%	7%	18%	7%	11%

China Guideline Pool advertisers increased media spend in Q1 2024 but saw declines in the following quarters, with spend contracting by -8% in Q2 and -10% in Q3. Key sectors driving growth with double-digit increases included Consumer Electronics, Food/Produce/Dairy, and Alcoholic Beverages.

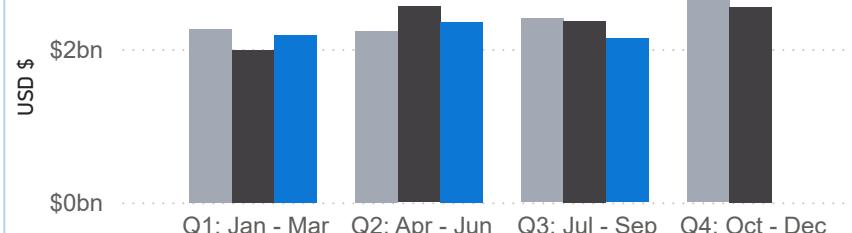


Market Total (Q1-Q3)

\$7bn

USD \$ by Quarter and Cal Year

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

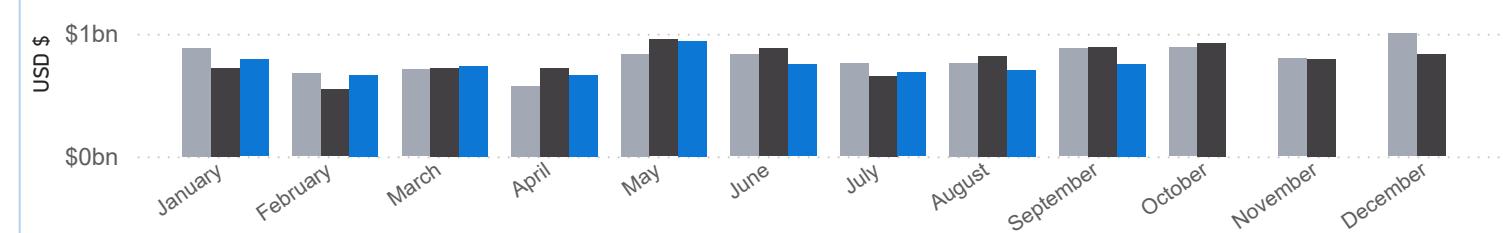


Qtr 1 Qtr 2 Qtr 3 Total

24 vs. 23 % Chg	10%	-8%	-10%	-3%
24 vs. 22 % Chg	-3%	5%	-11%	-3%

USD \$ by Month and Cal Year

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

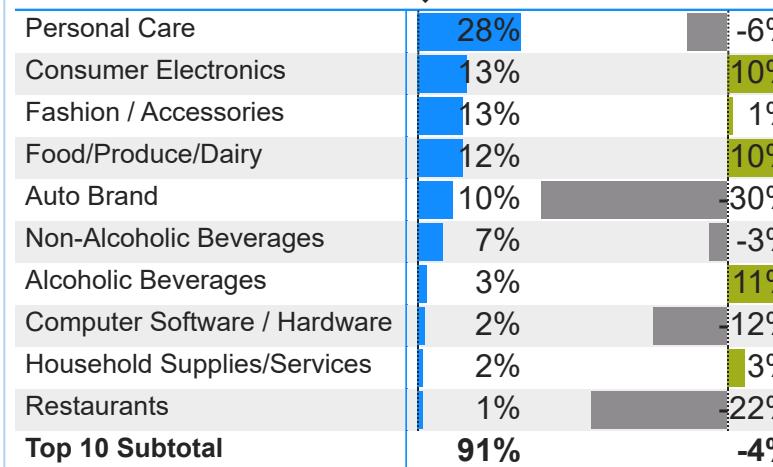


01 02 03 04 05 06 07 08 09 10 11 12 Total

24 vs. 23 % Chg	9%	21%	2%	-8%	-1%	-15%	4%	-14%	-16%		-29%
24 vs. 22 % Chg	-10%	-2%	4%	16%	13%	-10%	-10%	-8%	-15%		-30%

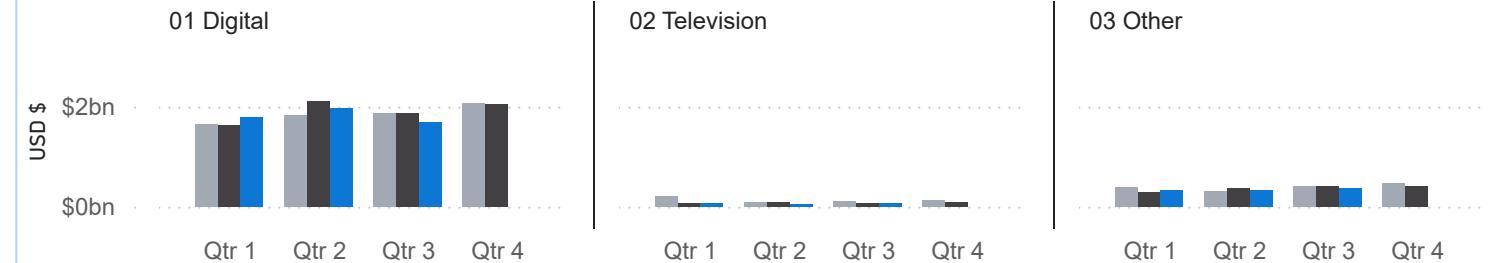
Top 10 Categories (Q1-Q3)

Category 2024 So\$ 2024 vs. 2023 \$ % Chg



USD \$ by Quarter, Cal Year and Media

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



Media	01 Digital	02 Television	03 Other									
	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total
24 vs. 23 % Chg	10%	-6%	-10%	-3%	-12%	-36%	-5%	-18%	18%	-8%	-9%	-2%
24 vs. 22 % Chg	8%	8%	-10%	1%	-68%	-40%	-24%	-51%	-16%	6%	-10%	-7%

Australia Guideline Pool advertisers maintained flat spend in Q1-Q3 2024 compared to 2023 but saw a slight decline of -1% compared to 2022 levels. Most of the Top 10 Product Categories reported YoY growth, with increases driven by Digital and Other media channels.



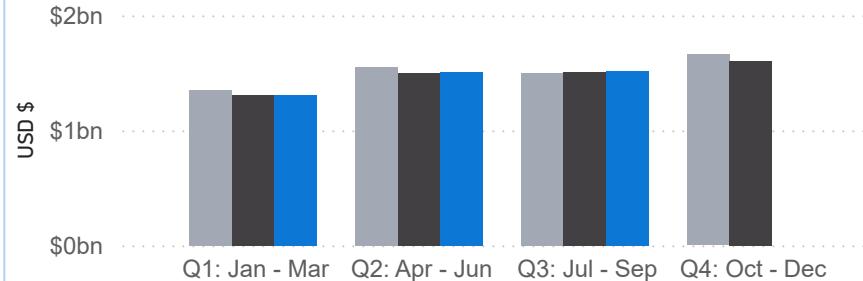
AUS

Market Total (Q1-Q3)

\$4bn

USD \$ by Quarter and Cal Year

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

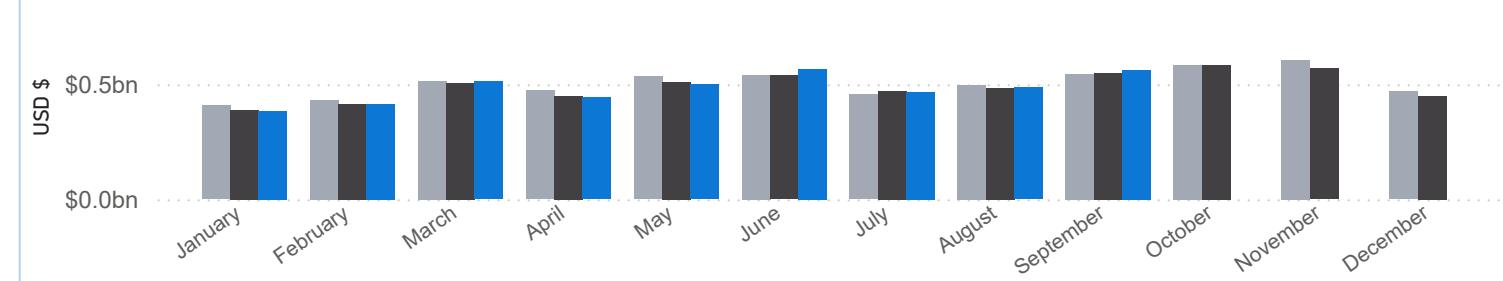


Qtr 1 Qtr 2 Qtr 3 Total

	24 vs. 23 % Chg	0%	1%	1%	0%
	24 vs. 22 % Chg	-3%	-3%	1%	-1%

USD \$ by Month and Cal Year

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

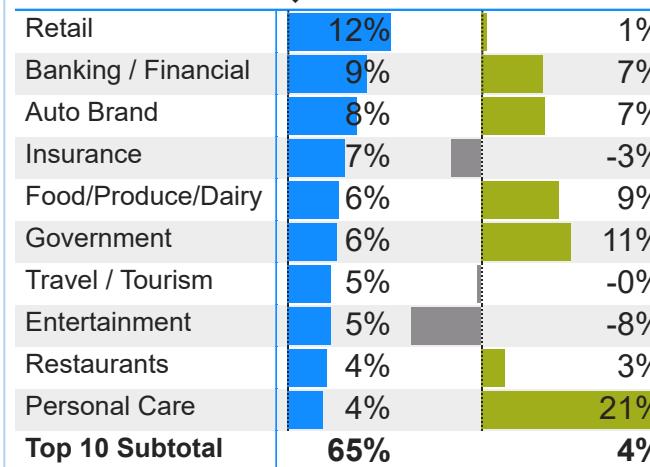


01 02 03 04 05 06 07 08 09 10 11 12 Total

	24 vs. 23 % Chg	-1%	-0%	1%	-2%	-2%	5%	-1%	1%	2%	-27%
	24 vs. 22 % Chg	-6%	-4%	-0%	-6%	-6%	5%	2%	-2%	3%	-28%

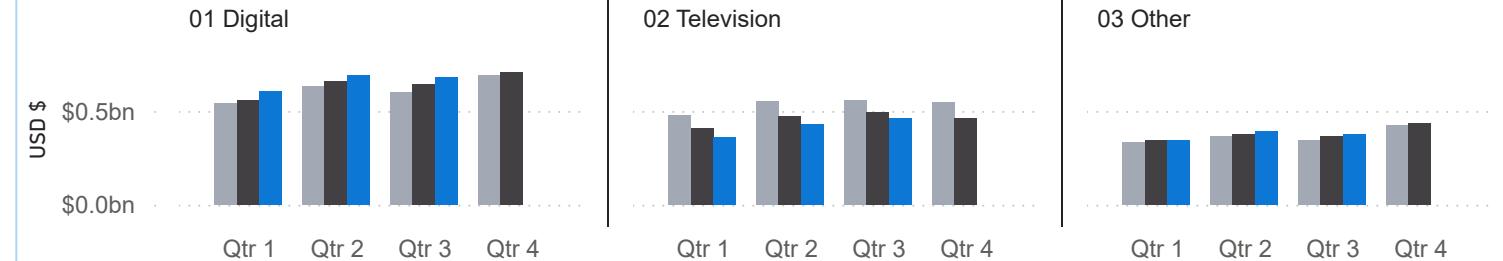
Top 10 Categories (Q1-Q3)

Category 2024 So\$ 2024 vs. 2023 \$ % Chg



USD \$ by Quarter, Cal Year and Media

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



Media	01 Digital			02 Television			03 Other			Total		
	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total
24 vs. 23 % Chg	9%	5%	5%	6%	-11%	-8%	-6%	-9%	0%	4%	2%	2%
24 vs. 22 % Chg	11%	9%	13%	11%	-24%	-22%	-17%	-21%	3%	6%	9%	6%

Canada Guideline Pool advertisers increased spend +6% in Q1-Q3 2024 compared to 2023, and +9% over 2022 levels. Household Supplies/Services led the surge in media investment during the period, with Auto Brands, Auto Dealers, and Government sectors also posting double-digit growth.

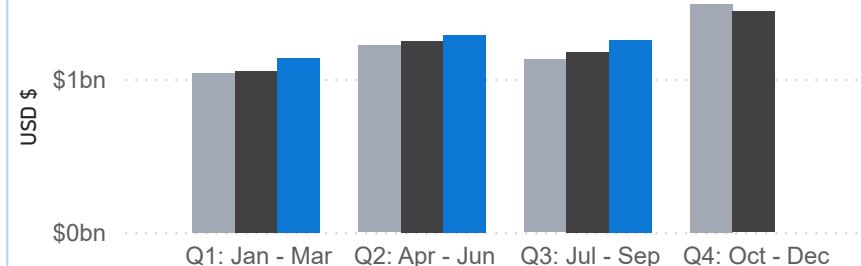


Market Total (Q1-Q3)

\$4bn

USD \$ by Quarter and Cal Year

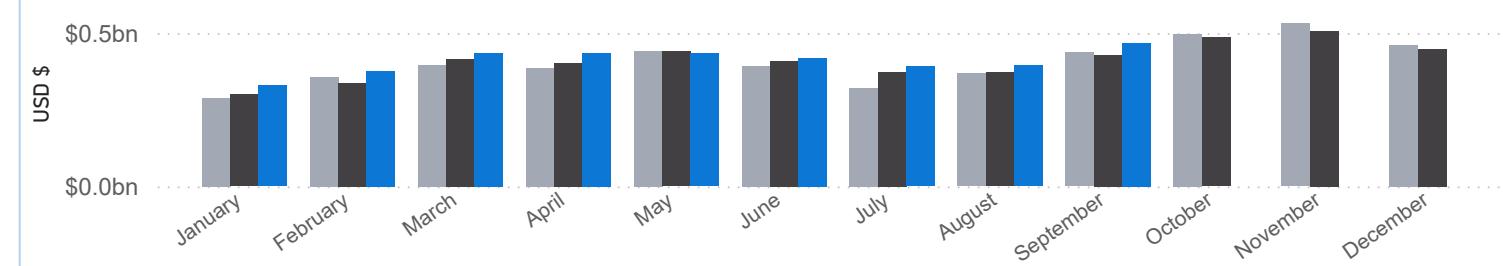
Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



	Qtr 1	Qtr 2	Qtr 3	Total
24 vs. 23 % Chg	8%	3%	7%	6%
24 vs. 22 % Chg	9%	6%	11%	9%

USD \$ by Month and Cal Year

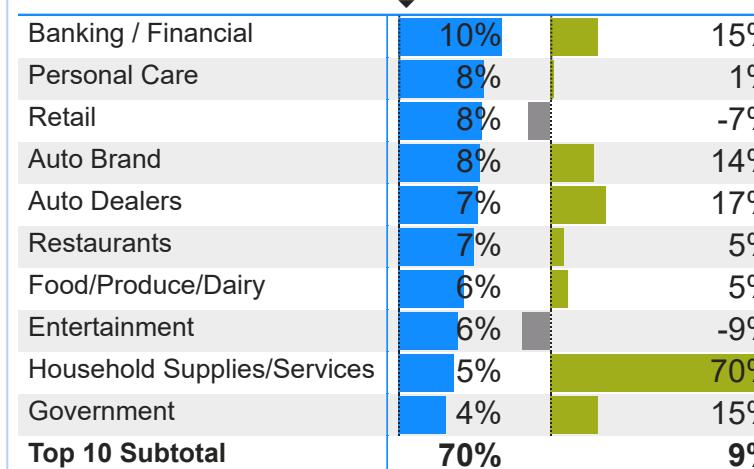
Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



	01	02	03	04	05	06	07	08	09	10	11	12	Total
24 vs. 23 % Chg	10%	11%	5%	8%	-2%	3%	5%	6%	9%				-25%
24 vs. 22 % Chg	14%	5%	9%	13%	-2%	7%	22%	7%	7%				-25%

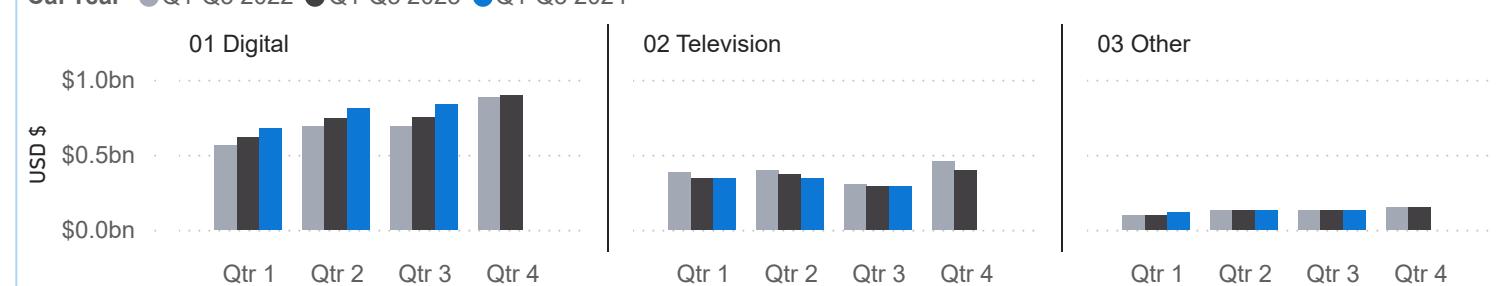
Top 10 Categories (Q1-Q3)

Category 2024 So\$ 2024 vs. 2023 \$ % Chg



USD \$ by Quarter, Cal Year and Media

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



Media	01 Digital	02 Television	03 Other									
	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total
24 vs. 23 % Chg	10%	9%	11%	10%	0%	-8%	1%	-3%	22%	2%	-4%	5%
24 vs. 22 % Chg	21%	18%	21%	20%	-11%	-15%	-5%	-11%	25%	4%	-2%	7%

New Zealand Guideline Pool advertisers reduced media spend -3% in Q1-Q3 2024 compared to 2023, marking an -11% decline from 2022 levels. Government media spend saw the steepest drop, while Insurance recorded the fastest growth among the Top 10 categories.



NZ

Market Total (Q1-Q3)

\$486M

USD \$ by Quarter and Cal Year

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

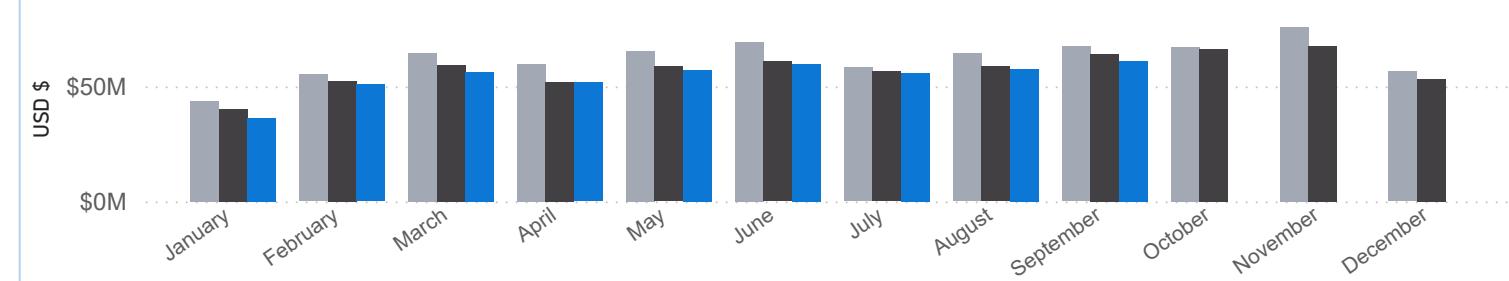


Qtr 1 Qtr 2 Qtr 3 Total

24 vs. 23 % Chg	-5%	-2%	-3%	-3%
24 vs. 22 % Chg	-12%	-13%	-8%	-11%

USD \$ by Month and Cal Year

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024

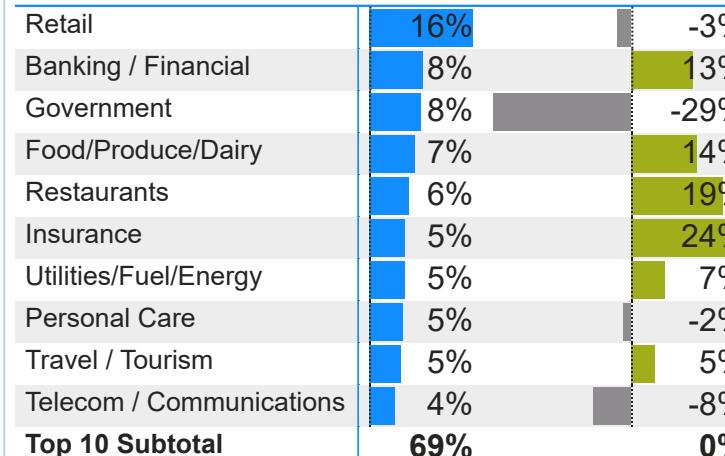


01 02 03 04 05 06 07 08 09 10 11 12 Total

24 vs. 23 % Chg	-10%	-3%	-5%	-0%	-2%	-2%	-1%	-2%	-5%	-29%
24 vs. 22 % Chg	-17%	-8%	-13%	-13%	-13%	-14%	-4%	-11%	-9%	-35%

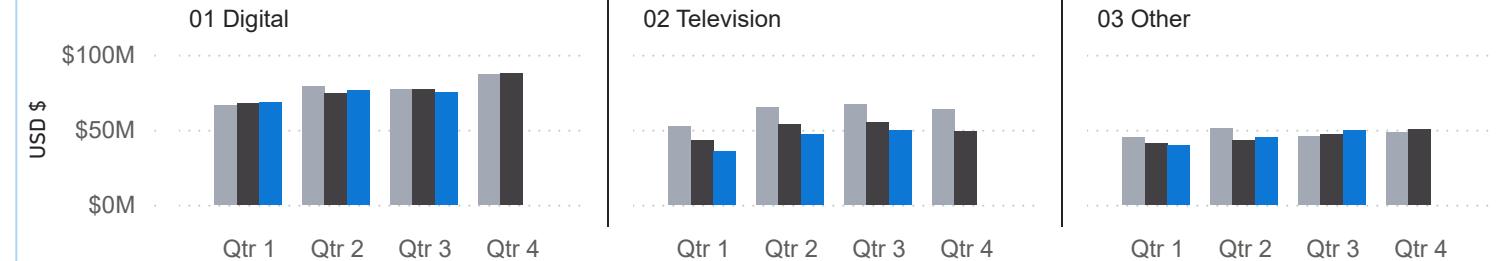
Top 10 Categories (Q1-Q3)

Category 2024 So\$ 2024 vs. 2023 \$ % Chg



USD \$ by Quarter, Cal Year and Media

Cal Year ● Q1-Q3 2022 ● Q1-Q3 2023 ● Q1-Q3 2024



Media	01 Digital			02 Television			03 Other			Total		
	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total	Qtr 1	Qtr 2	Qtr 3	Total
24 vs. 23 % Chg	0%	2%	-3%	-0%	-17%	-11%	-9%	-12%	-4%	4%	6%	2%
24 vs. 22 % Chg	3%	-4%	-3%	-1%	-31%	-27%	-26%	-28%	-12%	-11%	8%	-5%