

Global Ad Trends

August 2019 – Cinema

Other key media intelligence:

Google voice search is most effective for brands

American influencers command the highest price

Gaming consumption tops nine and a half hours per week

Connected TV and 30-second ads lead on video impressions

Amazon Prime Day reaches new heights in 2019

WARC[^] **Data**

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Cinema

- ✓ Cinema's share of global adspend, and growth in relation to other traditional media
- ✓ Cinema advertising spend by product category in the US
- ✓ Consumer perceptions towards cinema advertising
- ✓ Movie watching by medium, and consumer spend on home entertainment
- ✓ Netflix's rise in relation to the wider cinema market

2 Key media intelligence

New on WARC Data

- ✓ Google voice search is most effective for brands
- ✓ American influencers command the highest price
- ✓ Gaming consumption tops nine and a half hours per week
- ✓ Connected TV and 30-second ads lead on video impressions
- ✓ Amazon Prime Day reaches new heights in 2019

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The state of the global ad market

- ✓ The latest practitioner sentiment towards marketing budgets and trading conditions around the world
- ✓ Adspend projections from WARC's Consensus and International Ad Forecasts

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Media analysis

Cinema

0.4% average budget allocated to cinema among major US product verticals

0.7% cinema's share of global adspend, which has held steady since 2016

6.8% forecast rise in cinema adspend this year, making it the second-fastest growing ad medium

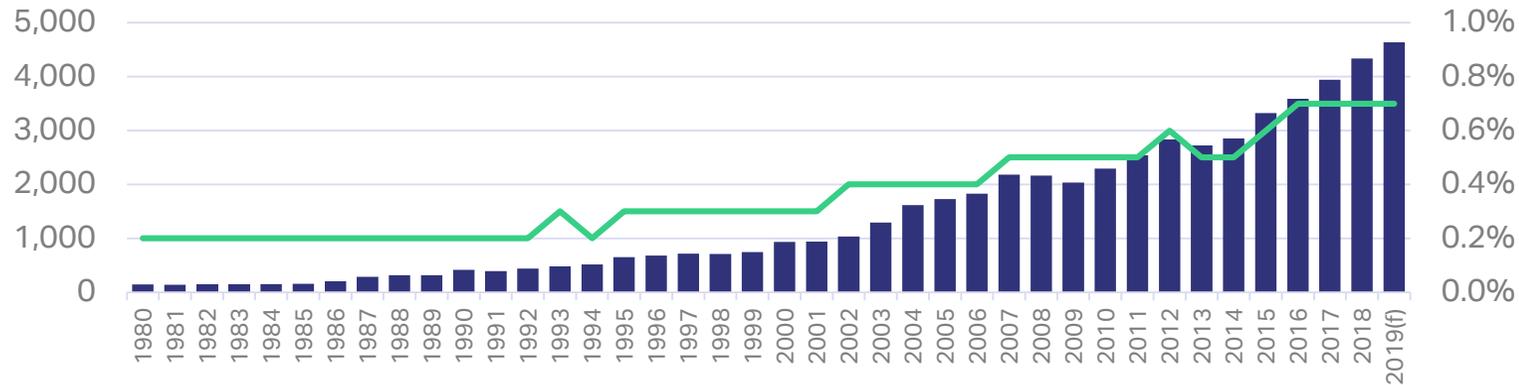
35.0% proportion of 16–34 year-olds who believe that cinema ads are 'trustworthy'

59.0% proportion of 'Gen Z' who feel positively towards cinema, ahead of all other traditional media

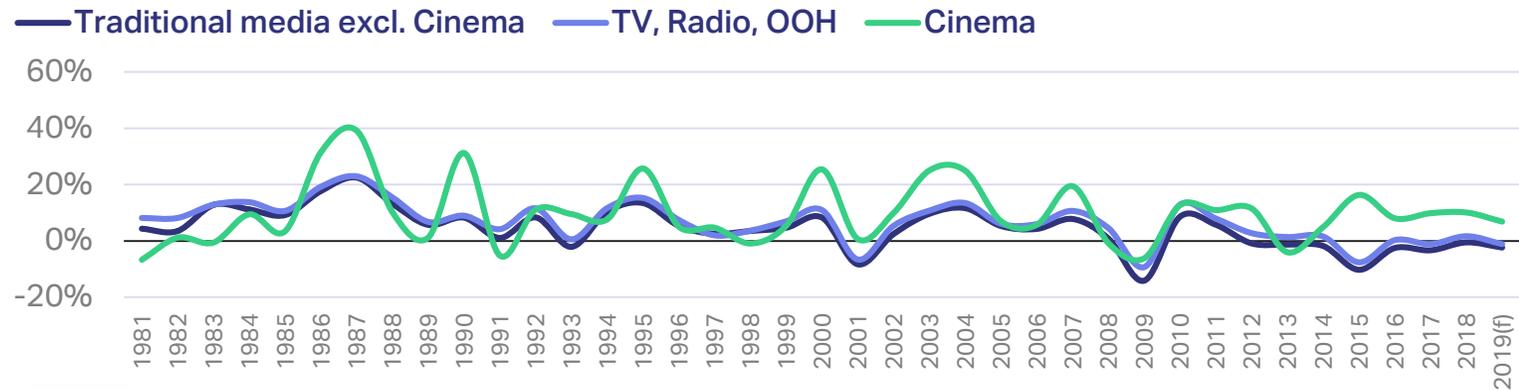
87.4% share of cinema ad growth to be generated in China this year

Cinema's share of global adspend is holding steady, while growth is outpacing all other traditional media

Global, Cinema advertising spend (bars) and share (line) of total adspend, US\$ millions, current prices



Global, Annual growth in advertising spend, US\$ current prices



Media Analysis: Cinema

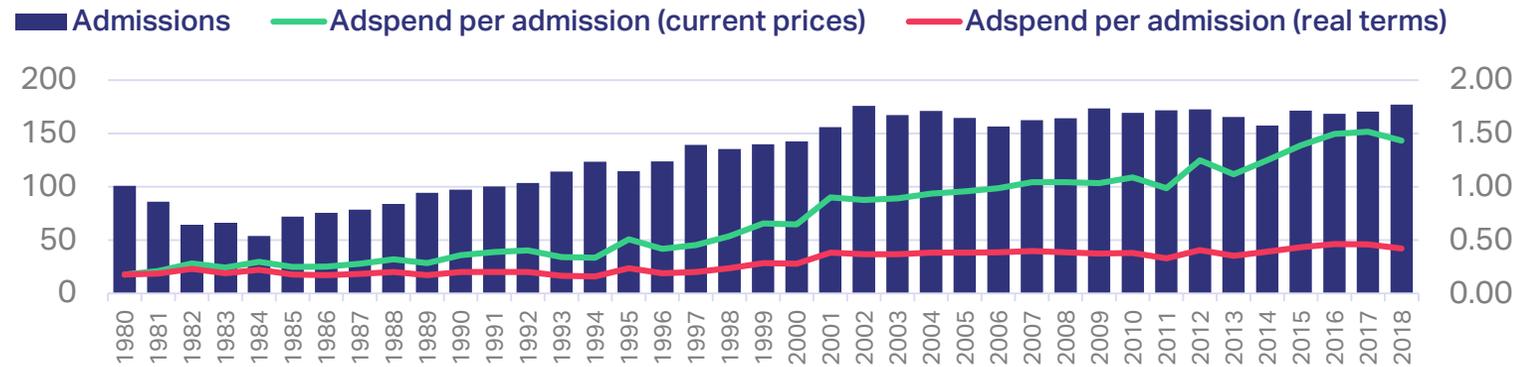
- ☉ The global cinema advertising market is expected to be worth \$4.6bn this year, representing a 6.8% rise from 2018. This is ahead of WARC's all media growth forecast of 4.6% for 2019 (to \$624.9bn), and places cinema as the second-fastest growing ad medium this year, behind internet as a whole.
- ☉ Further, cinema's 0.7% share of global adspend is expected to hold steady in 2019, making it the only medium other than internet not to lose share. Indeed, figures from WARC's [Adspend Database](#) show that cinema's share of global adspend has dipped only twice since 1980: once in 1994 and again in 2013.
- ☉ Data show that growth in cinema ad investment has generally tracked ahead of other traditional media since 1995, and consistently so since 2014. Severe losses in print advertising business skew this comparison to a degree, but the trend is still apparent with print removed.

Get the data

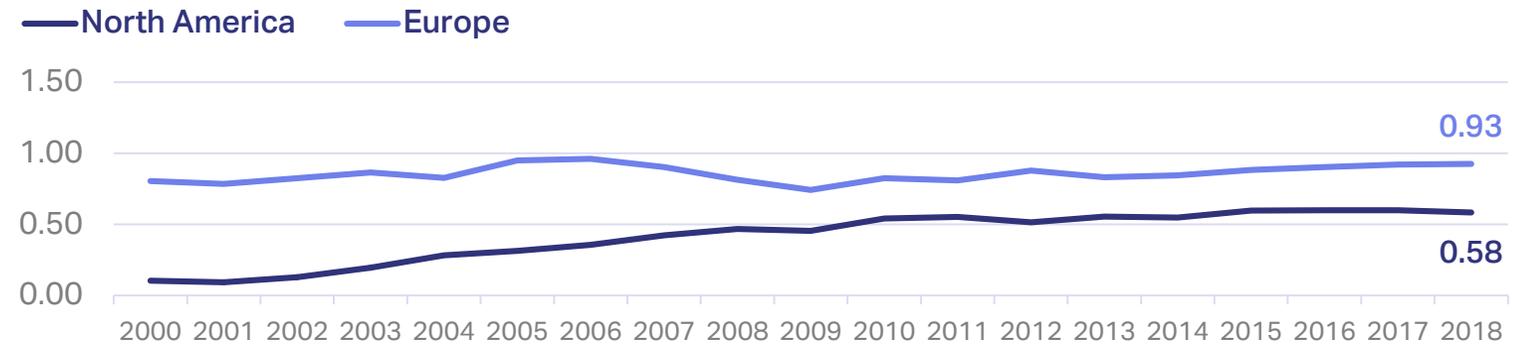
SOURCE › WARC Data, Adspend Database

The European cinema market is in rude health

UK, Cinema admissions (millions) and adspend per admission (£)



Key regions, Cinema advertising spend per admission, Purchasing Power Parity



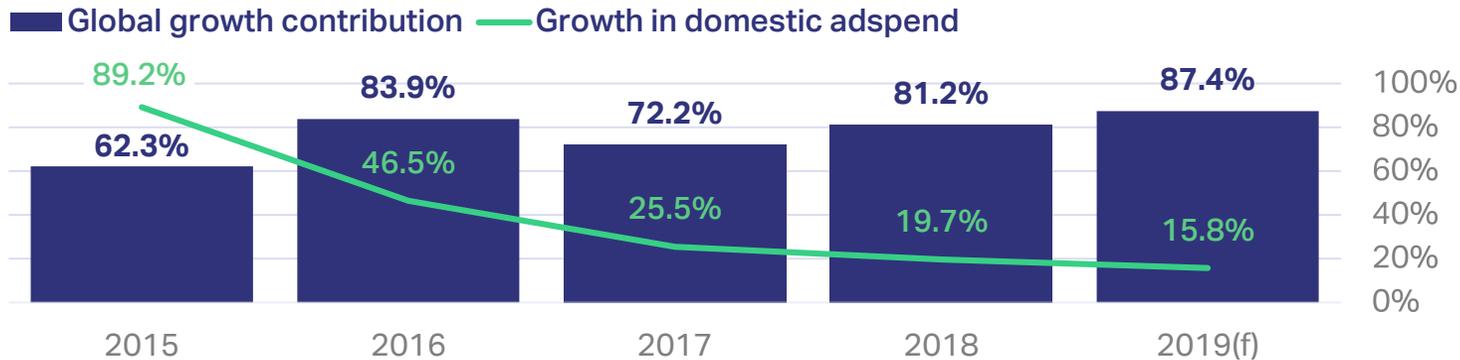
SOURCE: WARC Data, DCM, MPA, European Audiovisual Council

Media Analysis: Cinema

- Adspend per admission has grown steadily over the long term in the UK, rising from £0.18 in 1980 to £1.43 last year, when 177m admissions were recorded – the highest on record. Beyond the UK, European advertisers spent 1.6 times more on cinema per admission than in the US last year when measured in Purchasing Power Parity (PPP) terms (so as to remove the distorting effects of exchange rate fluctuations).
- Research by UNIC has found that the number of films screened in European cinemas (including the UK) has almost doubled over the last 15 years, with the highest growth recorded in Estonia (+175%), the UK (+112%), Poland (+102%) and Germany (+60%).
- Ancillary research by the European Audiovisual Council, published this month, shows that China became the largest export market for European films in terms of admissions in 2017. China accounted for 37% of cumulative admissions to European films outside of Europe, compared to 28% for North America and 24% for Latin America. However, the US and Canada remained the most significant export market for European films in terms of gross box office earnings.

China is driving global growth

China, Growth in domestic cinema adspend and contribution to global growth in cinema adspend



SOURCE › WARC Data, Adspend Database

Box office revenue, US\$ billions, current prices



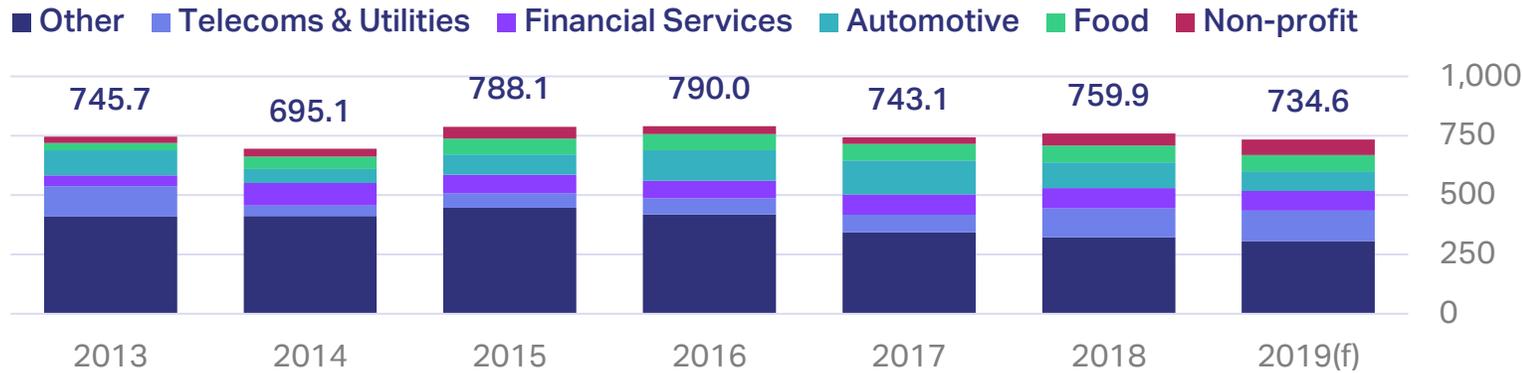
SOURCE › Ovum, PwC, Global Entertainment & Media Outlook, 2019–2023

Media Analysis: Cinema

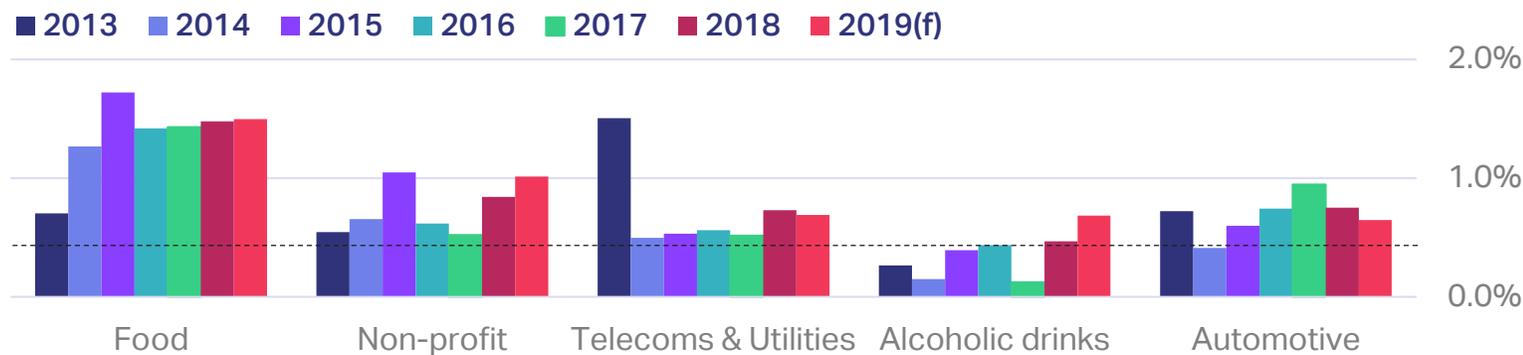
- ☑ Data from CTR show that China is the largest cinema ad market globally, with RMB10.3bn (US\$1.6bn) spent in 2018. This equated to a 44.1% share of cinema adspend worldwide last year, when measured in Purchasing Power Parity (PPP) terms, which removes the impact of exchange rate fluctuations. Further, China has accounted for three quarters (74.9%) of global growth in cinema adspend since 2015 on average, and is expected to contribute 87.4% this year.
- ☑ Aside from rising advertiser investment, Chinese consumers are spending more at the box office. PwC believes that China will become the largest cinema market in 2020, with box office receipts totaling \$12.3bn. This would put China ahead of the US for the first time, as box office income for the latter plateaus.
- ☑ IHS figures suggest that the number of cinema screens in China increased by 9,303 in 2018 alone, or 26 per day on average. Wanda Group is the largest vendor, with 16,599 screens across 1,621 sites in China. Then follows Guangdong Dadi (5,982 screens and 934 sites), China Film Digital (4,661 and 752), China Film South (3,936 and 672) and China Film Stella (3,233 and 503).

Cinema draws less than half a percent of US media budgets on average

US, Top five product categories for cinema advertising spend, US\$ millions, current prices



US, Cinema share of media spend among top five product categories



Note: Data are net of discounts, include agency commission and exclude production costs.

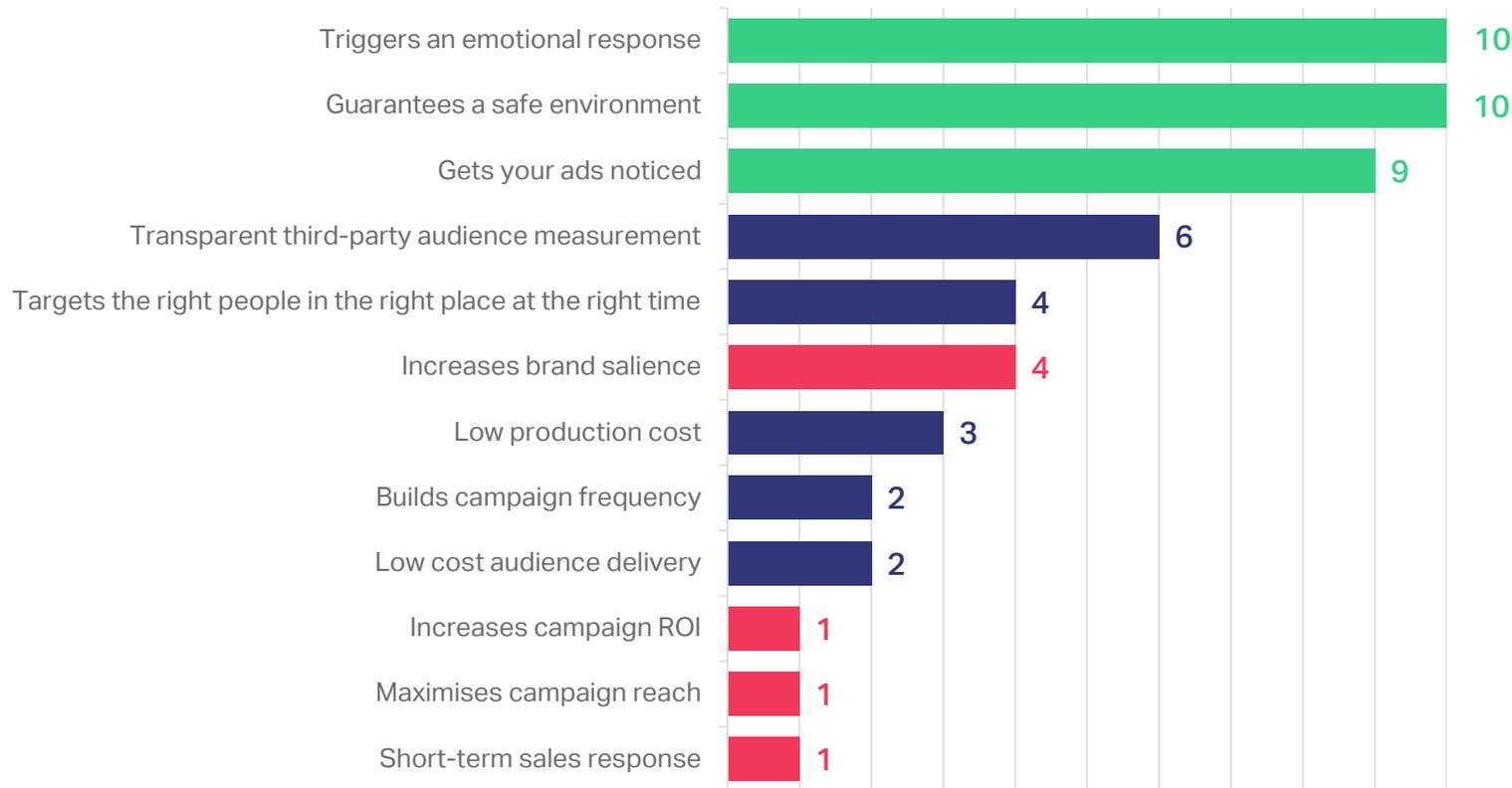
SOURCE > WARC Data, Nielsen

Media Analysis: Cinema

- When analysing US cinema adspend by product category, it can be seen that the top five verticals will account for 58.3% of investment this year – up from 45.1% in 2013 – according to new net data from WARC. Telecoms & utilities brands are set to be the highest spenders, collectively, at \$127.9m in 2019. The financial services (\$83.1m), automotive (\$83.0m), food (\$68.0m) and non-profit (\$57.4m) sectors complete the top five.
- Across 19 product verticals, cinema draws just 0.4% of US media budgets on average. But seven categories allocate more than this, most notably food, for which cinema accounts for 1.5% of all media spend. Non-profit (1.0%), telecoms & utilities (0.7%), alcoholic drinks (0.7%), automotive (0.6%), transport & tourism (0.6%) and financial services (0.5%) also invest a larger proportion of their budgets to cinema than the US average.
- Digital Cinema Media (DCM) recommended that brands invest **a minimum of 2.7% of budgets in cinema**, with some sectors like travel & tourism seeing optimal levels of campaign ROI when allocating as much as 11%. Notably, there's no need to create new content specifically for cinema – **it can extend the life of a TV campaign**.

Attentive audiences ensure cinema ads get noticed in a brand-safe environment

UK, Cinema index score against core campaign goals (green is highest among all media, red is lowest)



SOURCE › Ebiquity, *Re-evaluating Media*

Media Analysis: Cinema

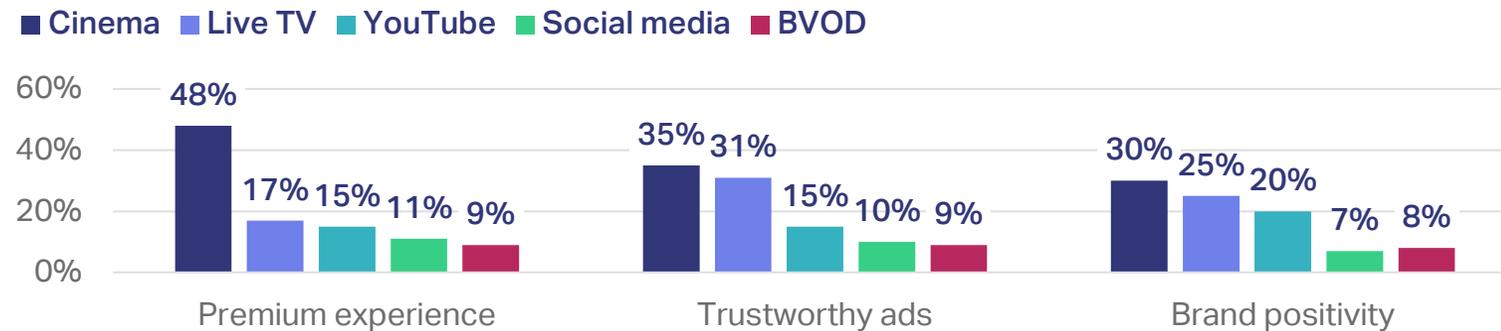
- Cinema attracts a younger, more affluent audience who tend to be lighter TV viewers and who've paid to give their undivided attention to the big screen. In the UK, DCM research shows that ABC1 adults visit the cinema 6.6 times in an average year, ahead of the all adult rate of 6.0. Further, those aged 16–34 visit 7.5 times in an average year, while main shoppers with children visit 5.6 times per year on average.
- Captive audiences viewing high-quality ads in an emotional atmosphere is a draw for advertisers. Research from **Ebiquity** shows that cinema scores higher than all other media in regard to triggering an emotional response in audiences, getting ads noticed, and offering a brand-safe environment.
- Cinema is strong at long-term brand building, but it can also work for short-term activation, despite scoring lowest for this in Ebiquity's study. Ad slots can be bought by audience, specific film, location, genre and showing time for targeting. Cinemas are also close to retail outlets and, by extension, a point of purchase: 42% of consumers surveyed by DCM stated that **they went for food or drink after seeing a movie.**

Young cinema audiences have a positive affinity with the medium

UK, Top three AV media synonyms among 16–34 year-olds, % share of respondents

Cinema	Live TV	YouTube	Social video	BVOD
37% Shared experience	30% Fill time	43% Fill time	38% Fill time	27% Binge viewing
34% High attention	26% Background viewing	28% Helps me escape	27% Low attention	25% Fill time
31% Quality content	18% Comforting	27% Binge viewing	20% Spontaneous	19% Quality content

UK, Consumer attitudes towards AV media, 16–34 year-olds, % share ranking medium top



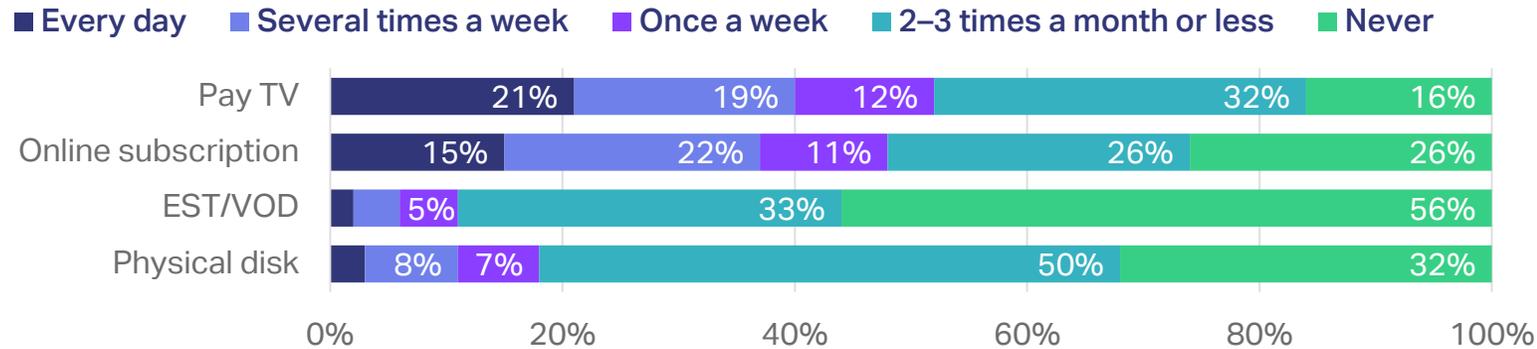
Note: n=1,000 users of each medium, aged 16–34.
SOURCE › DCM

Media Analysis: Cinema

- Research by DCM identifies that cinema occupies a unique position within the AV market, in that it is the only fully 'active' channel in terms of consumer attention. A third (34%) of respondents aged 16–34 regard cinema as synonymous with 'high attention', compared to 27% who bracket social video with 'low attention'. All AV media bar cinema incorporate a passive element, often 'filling time'.
- According to the IPA's *TouchPoints 6*, cinema delivers a more positive emotional experience than any other AV channel – 84% of time spent at the cinema is associated with positive emotions for 16+ adults, versus 60–65% for live TV, longform VOD and short online video.
- Kantar Millward Brown has also found that among 'Gen Z' (16–19 year-olds), cinema is the most popular traditional advertising format with 59% feeling 'positive about it' as an advertising channel (compared to 34% for print, 38% for TV and 50% for outdoor). This is supported by research conducted in the US by National CineMedia (NCM) and MESH, which finds that cinema is one of the most impactful channels for **driving positive experiences for brands**.

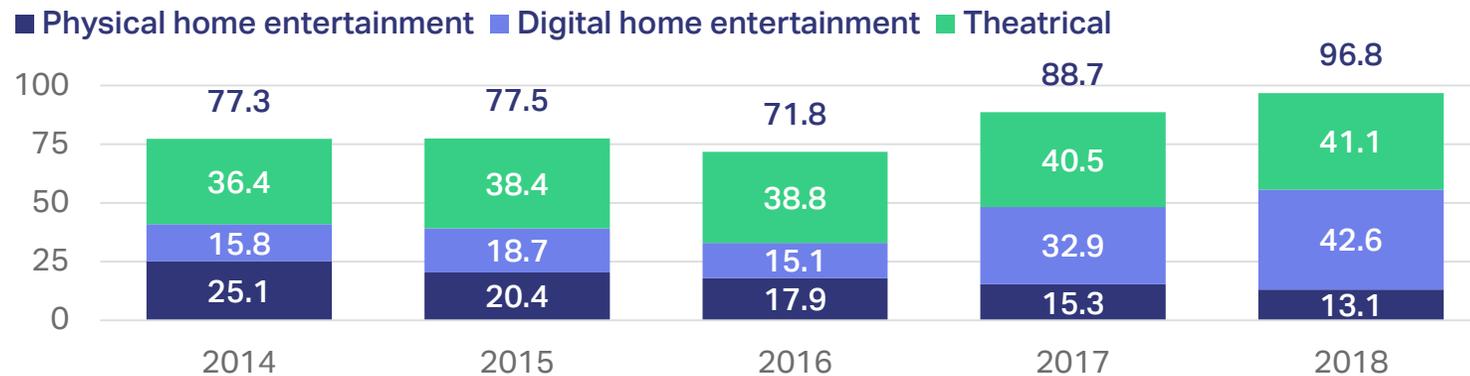
Consumers now spend more on streaming movies than visiting the cinema

US, Share of population viewing movies by home distribution channel, 2018



SOURCE › MPA

Global, Consumer spending on theatrical and home entertainment, US\$ billions, current prices



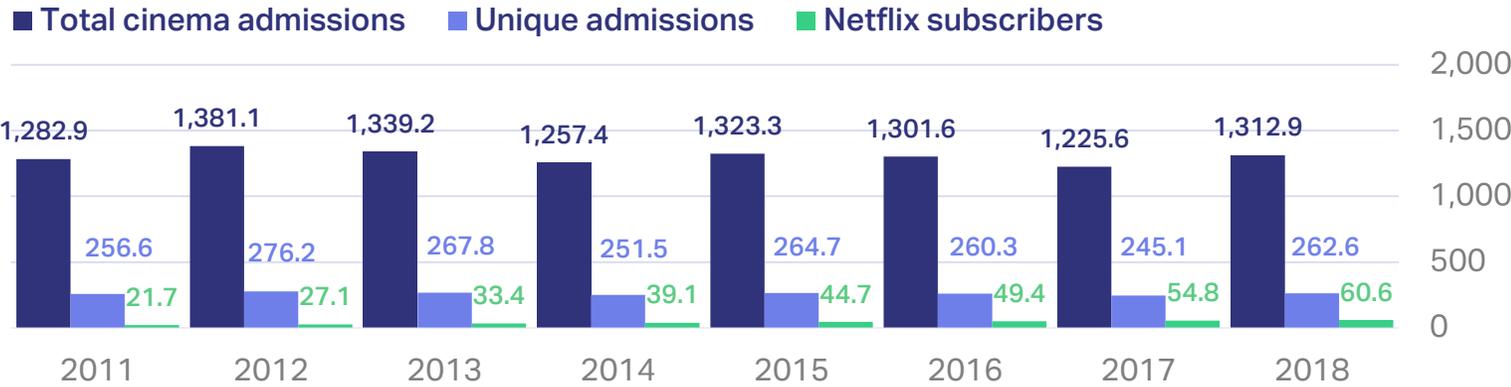
SOURCE › MPA, IHS Markit

Media Analysis: Cinema

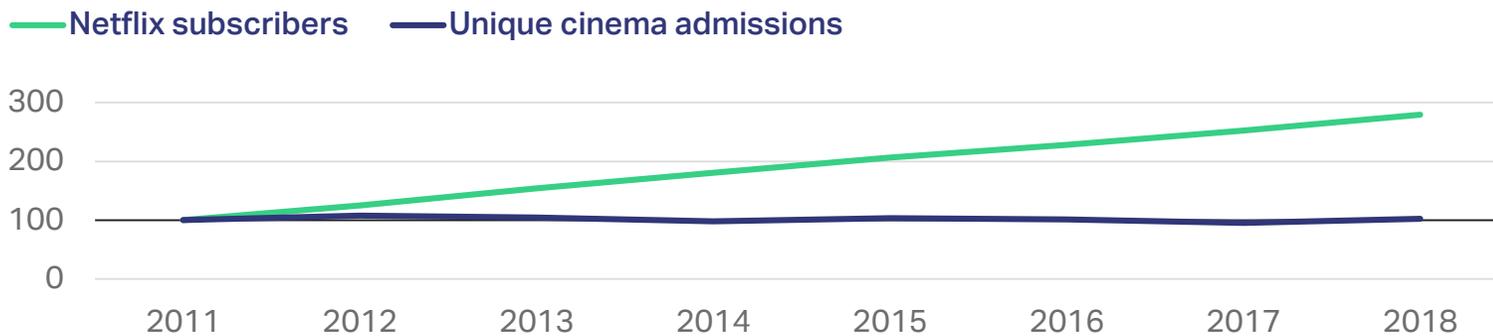
- ☑ Data from the Motion Picture Association of America (MPAA) show that over half (52%) of Americans watch a movie via a pay TV channel at least once a week, with over a fifth (21%) doing so every day. These proportions dip slightly to 48% and 15% for an online subscription, which includes Netflix (an MPAA member). Just 11% of Americans watch movies at least once a week via an electronic sell through (EST) or video on demand (VOD) service such as HBO Go.
- ☑ Further, data show that the amount consumers spend on digital home entertainment, including online subscriptions and through EST/VOD services, surpassed the amount spent at the cinema globally for the first time last year (\$42.6bn versus \$41.1bn). This landmark had already been reached in the US during 2015.
- ☑ Over the course of an average year, a Netflix subscription will cost a consumer \$113.16. This compares to the \$45.55 a North American will spend at the cinema each year on average, with the equivalent figures for the UK and the EU at \$25.13 and \$11.04 respectively.

Is the sofa becoming the silver screen?

US, Netflix subscriptions versus cinema admissions, Millions



US, Growth in Netflix subscriptions and unique cinema admissions, Index (2011=100)



SOURCE › Netflix, Nash Information Services, MPA, WARC Data

Media Analysis: Cinema

- ⊗ Cinema admissions dwarf Netflix subscriptions by a ratio of almost 22:1 in the US. But the MPAA believes that a moviegoer visited the cinema five times on average in 2018, which roughly equates to 263m consumers going every two months. And with almost three-quarters (74%) of Americans now using an online subscription – and 84% using a pay TV channel – to watch a movie at least 2–3 times each month, viewership in the living room may have reached parity with the silver screen.
- ⊗ Ancillary data from GlobalWebIndex show that Netflix is the most popular choice for watching movies among 46% of UK consumers, with cinema only marginally ahead on 48%. Despite Netflix gaining popularity, cinema admissions reached their highest ever level in the UK last year, at 177m (up 3.7%), suggesting SVOD services have not impacted negatively.
- ⊗ Many in the industry believe that the experiential nature of cinema places it in a different bracket to SVOD services, which instead occupy a similar space to traditional TV. This, coupled with the exclusivity of box office hits – particularly franchises – should ensure any downward pressure from SVOD services is minimal.

2 Key media intelligence

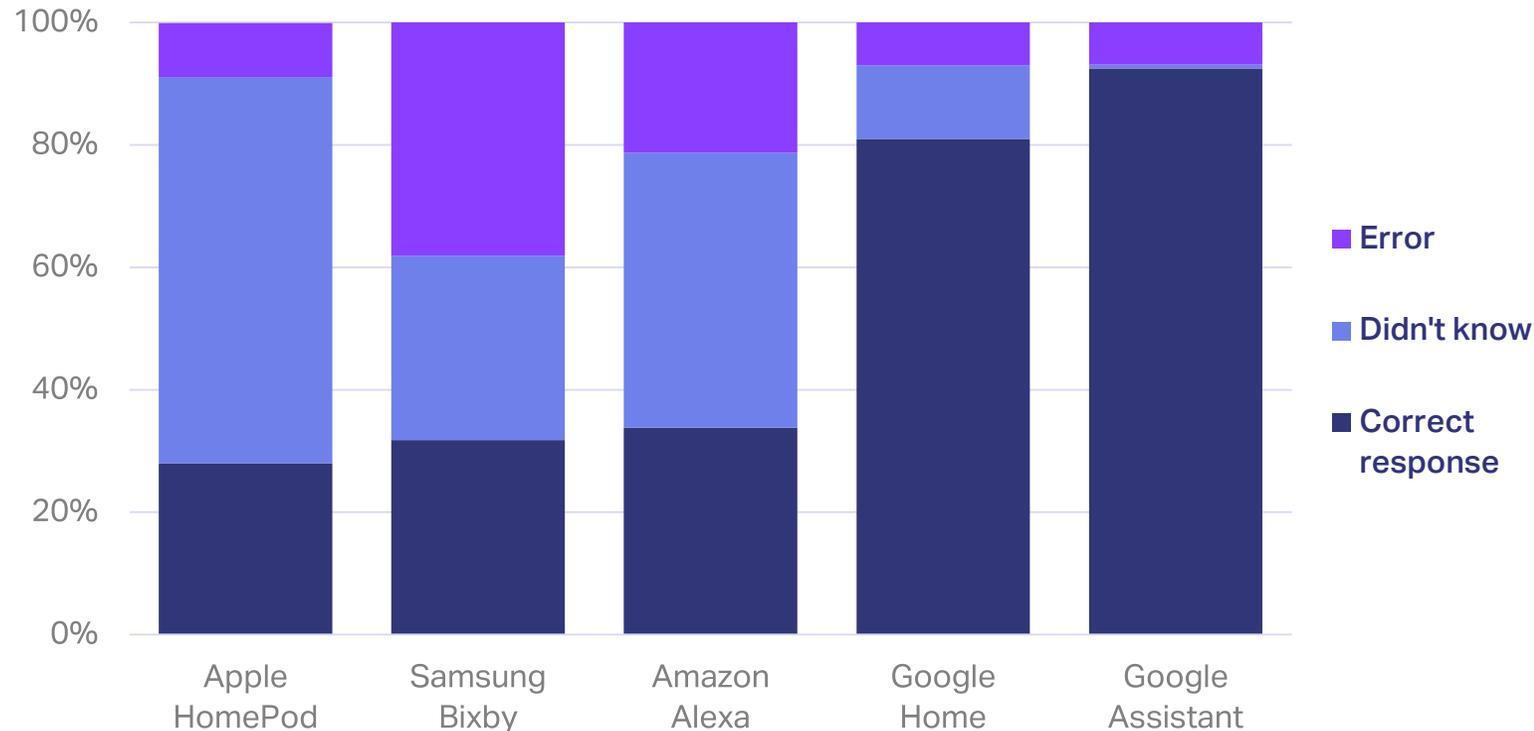
New on WARC Data

- ✔ Google voice search is most effective for brands
- ✔ American influencers command the highest price
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- ✔ Connected TV and 30-second ads lead on video impressions
- ✔ Amazon Prime Day reaches new heights in 2019

See all

Google voice search is most effective for brands

Global, Response to brand and product queries, % of total



Note: Each asked 810 queries about 200 brands and 21 product categories. Apple HomePod with Siri, Samsung Bixby on smartphone, Amazon Alexa on Echo smart speaker, Google Home and smartphone with Google Assistant. Brand questions include "Where can I buy [brand]?", product category includes "What snacks are gluten free?".

SOURCE › Voicebot and Magic + Co, *Voice Assistant SEO Report for Brands, July 2019*

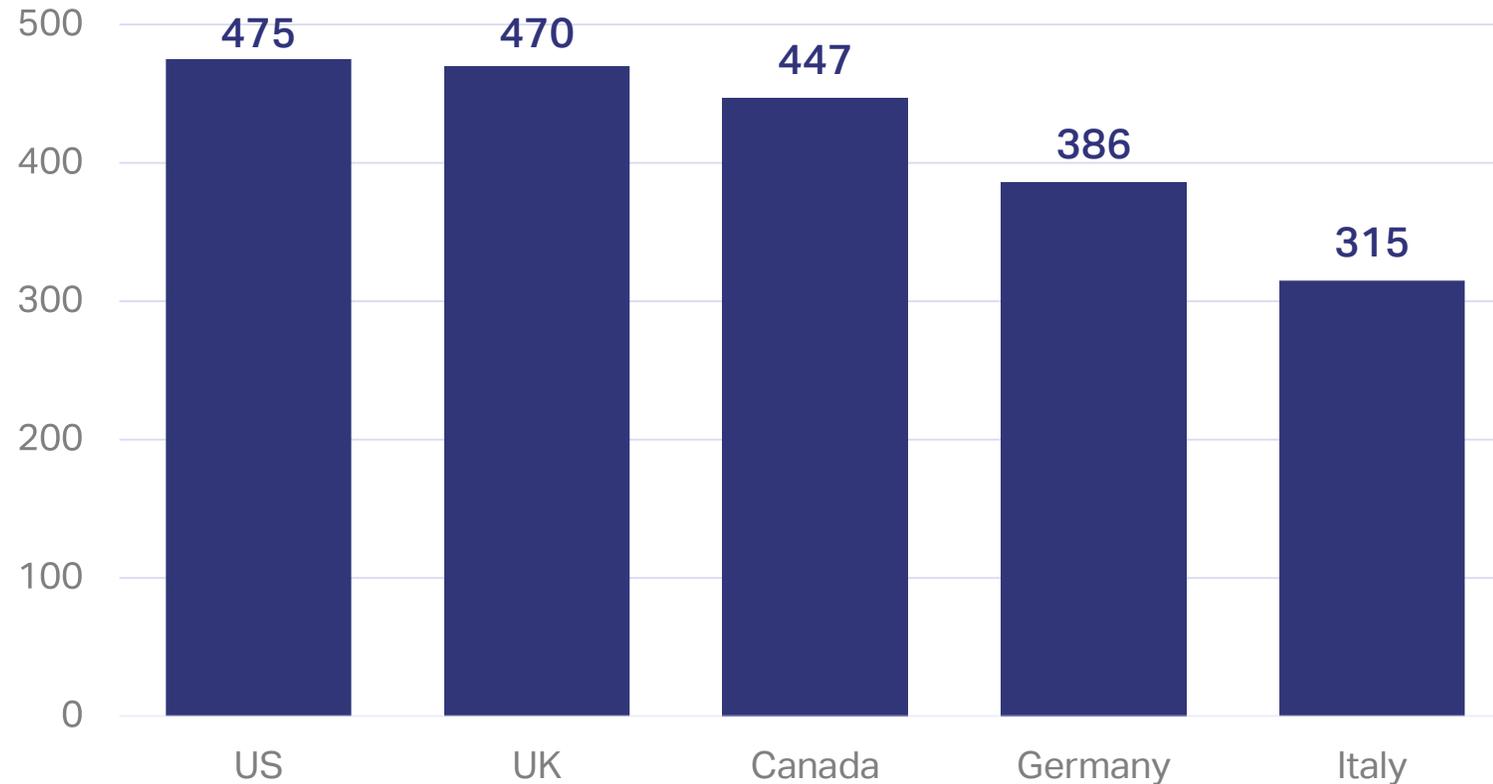
Get the data

Media Intel

- ✔ Google dominates the voice search market in terms of successful answers, according to the latest data from Voicebot and Magic + Co. Asking over 4,000 queries in total, Google Assistant on a smartphone and on a Google Home smart speaker are far ahead of competitors, providing a correct response over four-fifths of the time.
- ✔ Other voice assistants fared badly by comparison. Amazon Alexa on an Echo smart speaker provided a correct response only one-third of the time (33.8%), Samsung Bixby on a smartphone was slightly worse (31.8%), while only 28.0% of queries were successfully completed by Apple HomePod devices.
- ✔ Despite Google's greater success in correctly responding to queries, it lags significantly behind Amazon on both **consumer uptake** and **functionality**. For brands to benefit from this shift to **voice search**, it is vital they achieve '**position zero**' and develop a distinct **sonic identity**.

American influencers command the highest price

Global, Influencer marketing, Cost per post, \$



Note: Top five most expensive countries. Based on survey of pricing rates of over 2,500 influencers across different social media platforms.

SOURCE > Klear, *The Klear Influencer Marketing Rate Card*

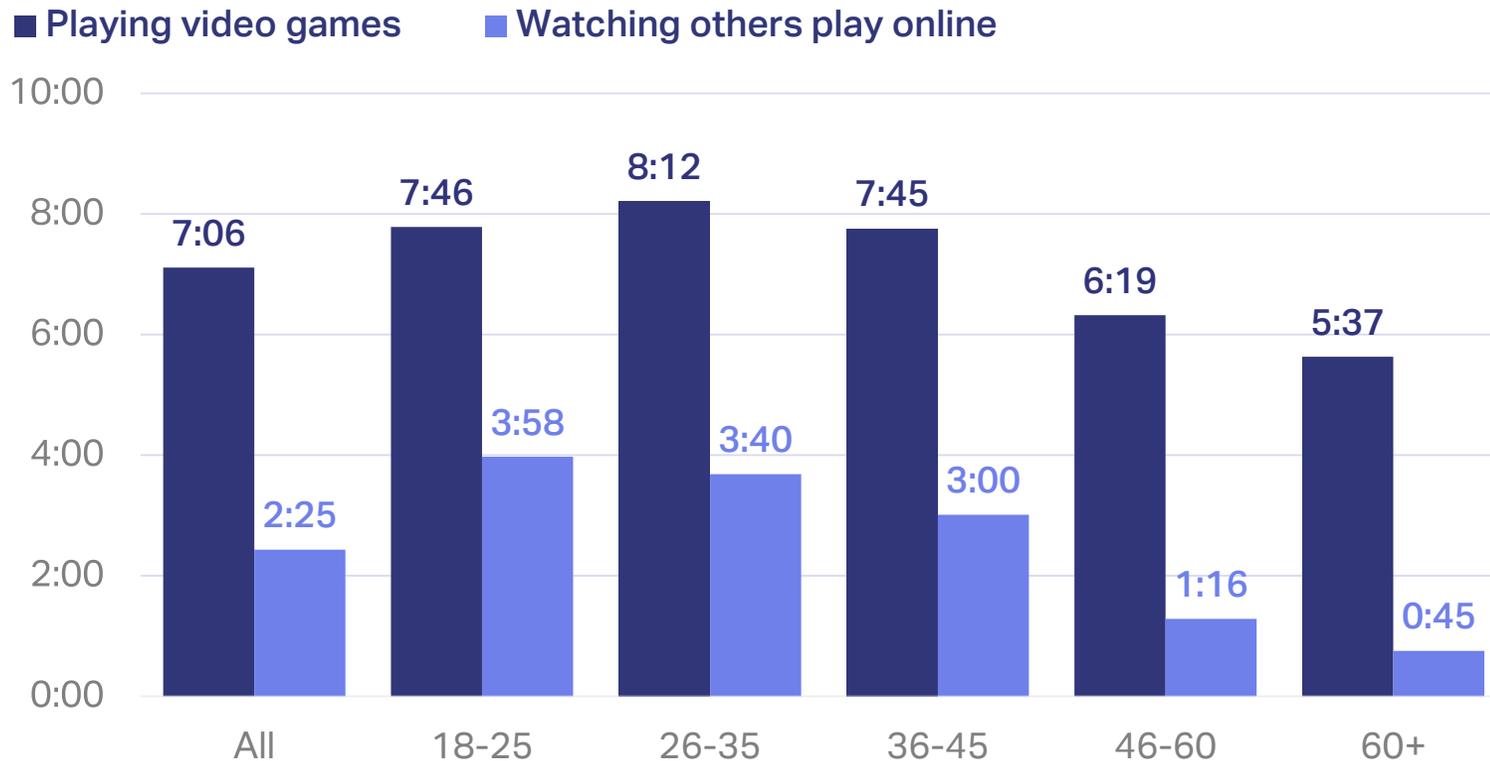
Get the data

Media Intel

- ✔ Marketers can expect to pay the most for American influencers, according to the latest data from **Klear**. According to a survey of the pricing rates of over 2,500 influencers working across different social media platforms, one post from an American influencer will cost \$475 on average.
- ✔ While 46% of influencer activity occurs in the US, costs do not differ substantially in less popular markets. One post from a UK-based or Canadian influencer is worth \$470 and \$447 respectively.
- ✔ Travel is by far the most expensive sector, nearly 9x more than the second-placed fashion. Klear notes travel's high cost is due to production time and effort, with many posts utilising video.
- ✔ Indeed, an Instagram video post from a celebrity **costs 50.5% more** than a static image post. Overall, a YouTube video is **most expensive** regardless of the size of the influencer's following.
- ✔ Influencer marketing is **forecast to be worth** up to \$10bn next year, in part due to their **authenticity and expertise**. However, issues surrounding **transparency**, integrating into the **media mix** and **follower fraud** are common.

Gaming consumption tops nine and a half hours per week

Global, Weekly average consumption (hours:minutes), 2019



Note: Adults 18+ who play video games at least once a week, Jan-Feb 2019 (n=4,500). Question: How many hours each week do you spend playing video games/watch other people play video games online (such as Twitch or YouTube Gaming)?

SOURCE › Limelight Networks, *The State of Online Gaming - 2019*

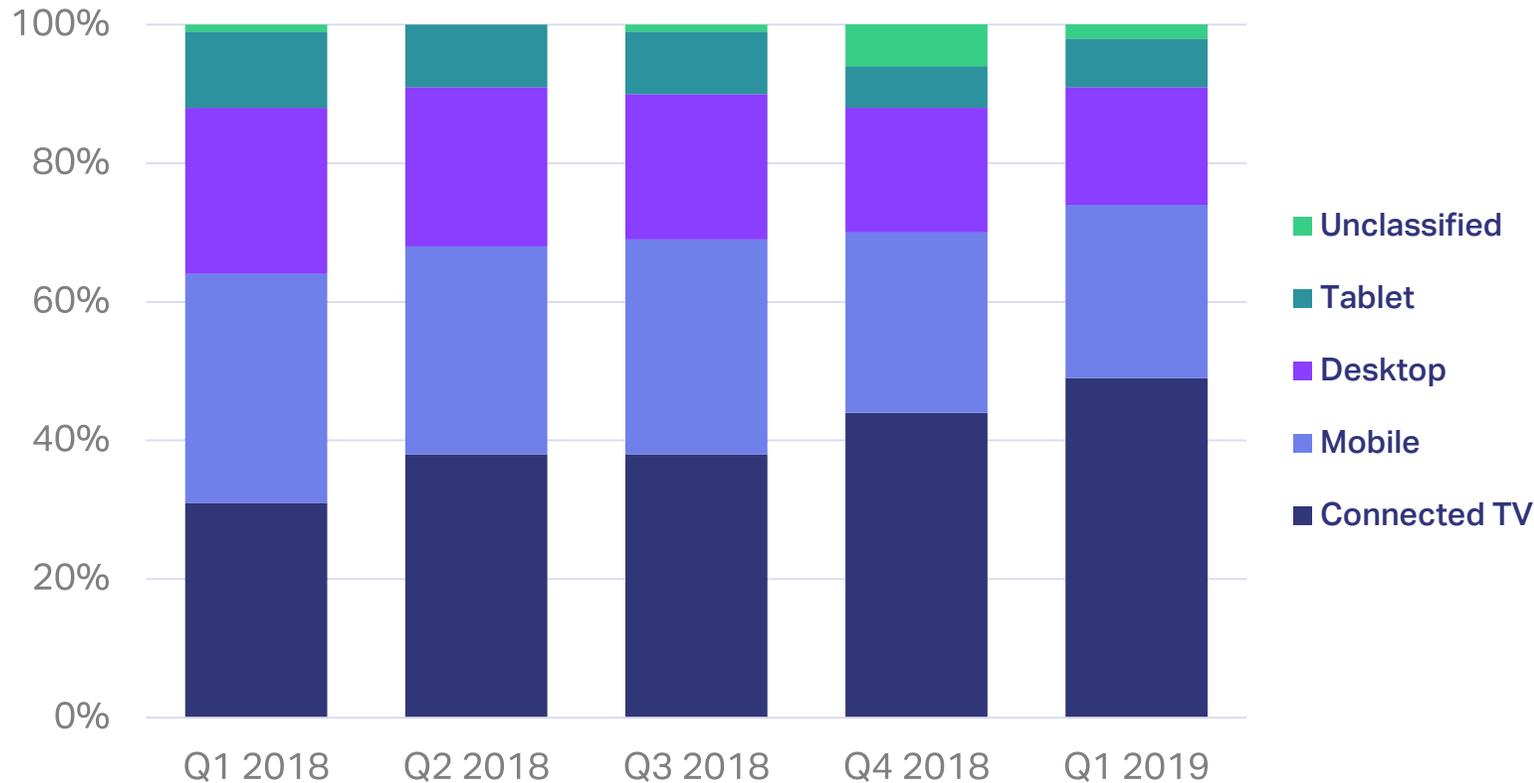
Get the data

Media Intel

- More and more people are engaging with gaming content, according to the **latest research** from Limelight Networks. Across nine countries and among adults who play video games at least once a week, 7:06 (hours:minutes) is spent each week playing video games. This is up 19.3% from 2018.
- In addition, nearly two and a half hours is spent watching others play online. Germans play video games for the longest period, reaching nearly eight hours each week while India takes the top spot at 3:40 for online watching.
- Playing video games is most popular for those aged 26–35 at over eight hours each week. However, gamers aged 18–25 spend the longest time viewing online content at four hours.
- Livestreams are the **most popular** kind of online gaming content, although **e-sports tournaments** is also common among those aged 16–34.
- Growing consumption has been boosted by the **cultural and business significance** of mass-participation games. **Mainstream brands** are now engaging with the sector, **most often through** in-game advertising and sponsorship.

Connected TV and 30-second ads lead on video impressions

Global, Video advertising by device, % of impressions



Note: Unclassified captures valid impressions per industry sources but Extreme Reach is unable to identify the platform or device.

SOURCE > Extreme Reach, Video Benchmarks Q1 2019

Get the data

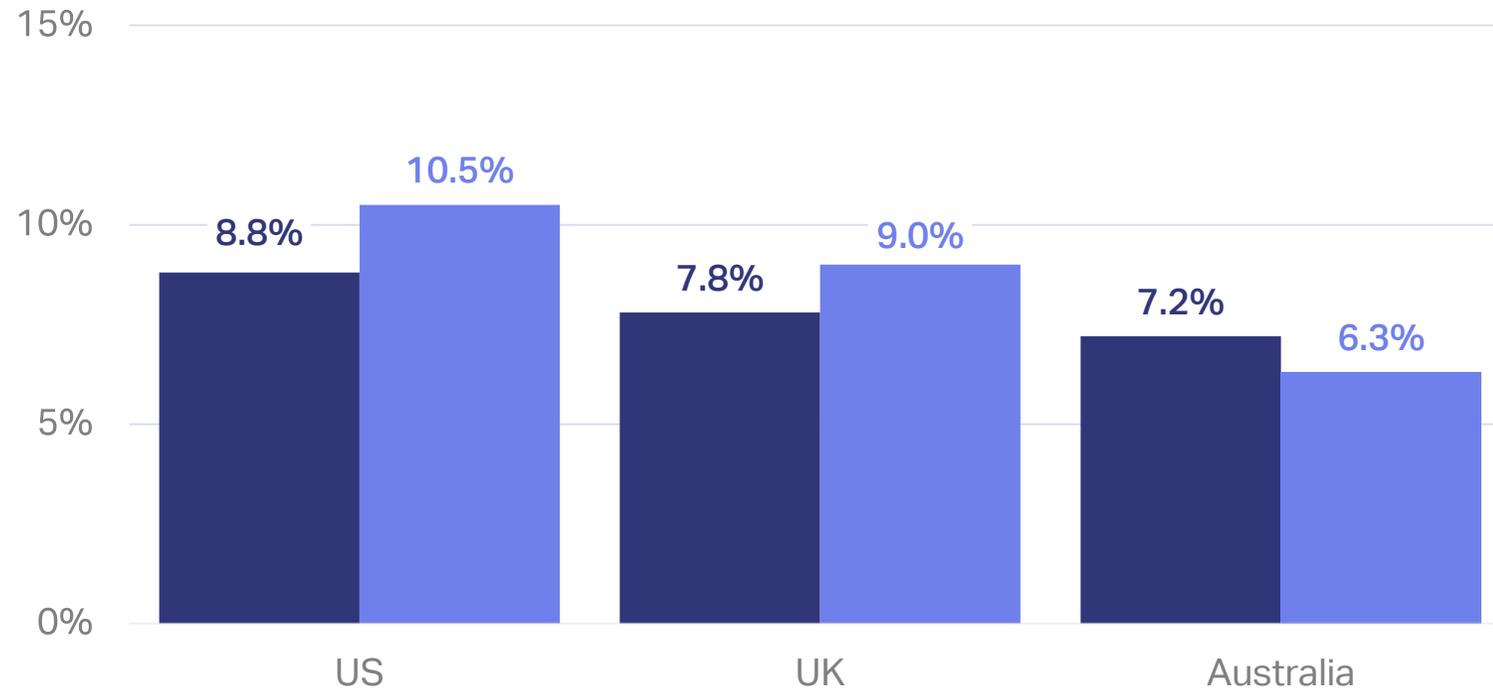
Media Intel

- Nearly half of video ad impressions are on connected TV devices, according to the latest data from **Extreme Reach**. CTV's share of all video impressions was 49% in Q1 2019, up from 31% the year before. This comes as ownership of connected TVs has risen to **over one-third**.
- All other devices saw their share fall over this period. Mobile impressions accounted for one-third of the total in Q1 2018 but this has fallen to one-quarter since.
- This growth in connected TV impressions has increased the length of ads, in part due to the TV-like experience of viewing and the inability of viewers to skip. 30-second ads now account for over two-thirds (69%) of all impressions. This is up from 46% in Q1 2018 and at the expense of 15-second ads.
- OTT television revenue is forecast to nearly **double in value** to \$130bn by 2023. Growing advertiser demand for **addressable TV** will boost this market, although issues around **measurement**, viewer **privacy concerns** and **audience fragmentation** are prominent.

Amazon Prime Day reaches new heights in 2019

Global, Amazon Prime Day conversion rate, %

■ 2018 ■ 2019



Note: Across 15/16 July 2019 and 16/17 July 2018. Event was 12 hours longer in 2019. Conversion rate is the number of transactions divided by the number of visits.

SOURCE > Hitwise

Get the data

Media Intel

- Amazon Prime Day is drawing more visitors and purchases, according to the latest data from Hitwise. Over the two day event this year, the number of visits to Amazon reached nearly 300m (292.6m) across the US, UK and Australia. This is up 2.7% from Amazon Prime Day 2018.
- Notably, the number of transactions on Amazon from US consumers exceeded 20m for the first time, up 18.0% from last year. Australia saw the largest growth, up 50.4% to 167.6k. The UK also saw strong growth, up 24.6% to 8.6m.
- Overall, more than one-tenth (10.5%) of American visits to Amazon led to a successful purchase. This was slightly lower in the UK, at 9.0%. Quicker growth in visits than transactions meant the conversion rate in Australia fell 0.9 percentage points between 2018 and 2019.
- Marketers have **taken notice**, in part due to the platform's role as a **product search engine** and its **strong brand value**.

3 Latest WARC research

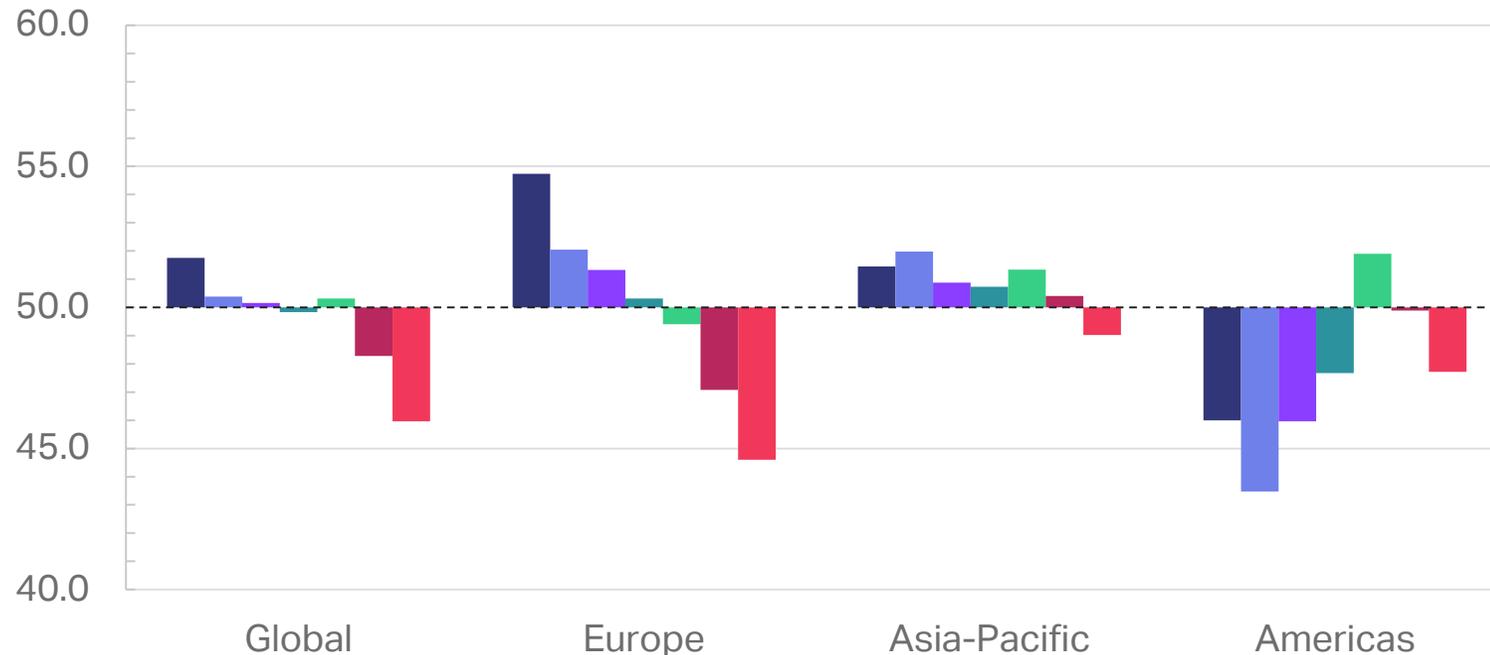
The state of the global ad market

- ✔ **WARC GMI:** Europe drags global marketing budgets further into decline
- ✔ **WARC GMI:** Digital growth accelerates while traditional budgets worsen
- ✔ **WARC Consensus Forecast:** Global ad market growth to ease to 4.2% this year
- ✔ **WARC International Ad Forecast:** Key market growth expected to slow to 6.4% this year
- ✔ **WARC International Ad Forecast:** Mobile to be the fastest-growing ad medium this year

WARC GMI: Europe drags global marketing budgets further into decline

Marketing budgets by region, 2019

■ January ■ February ■ March ■ April ■ May ■ June ■ July



Note: An index value over 50 indicates budget growth. A value under 50 indicates contraction.

SOURCE › WARC Data, Global Marketing Index, July 2019

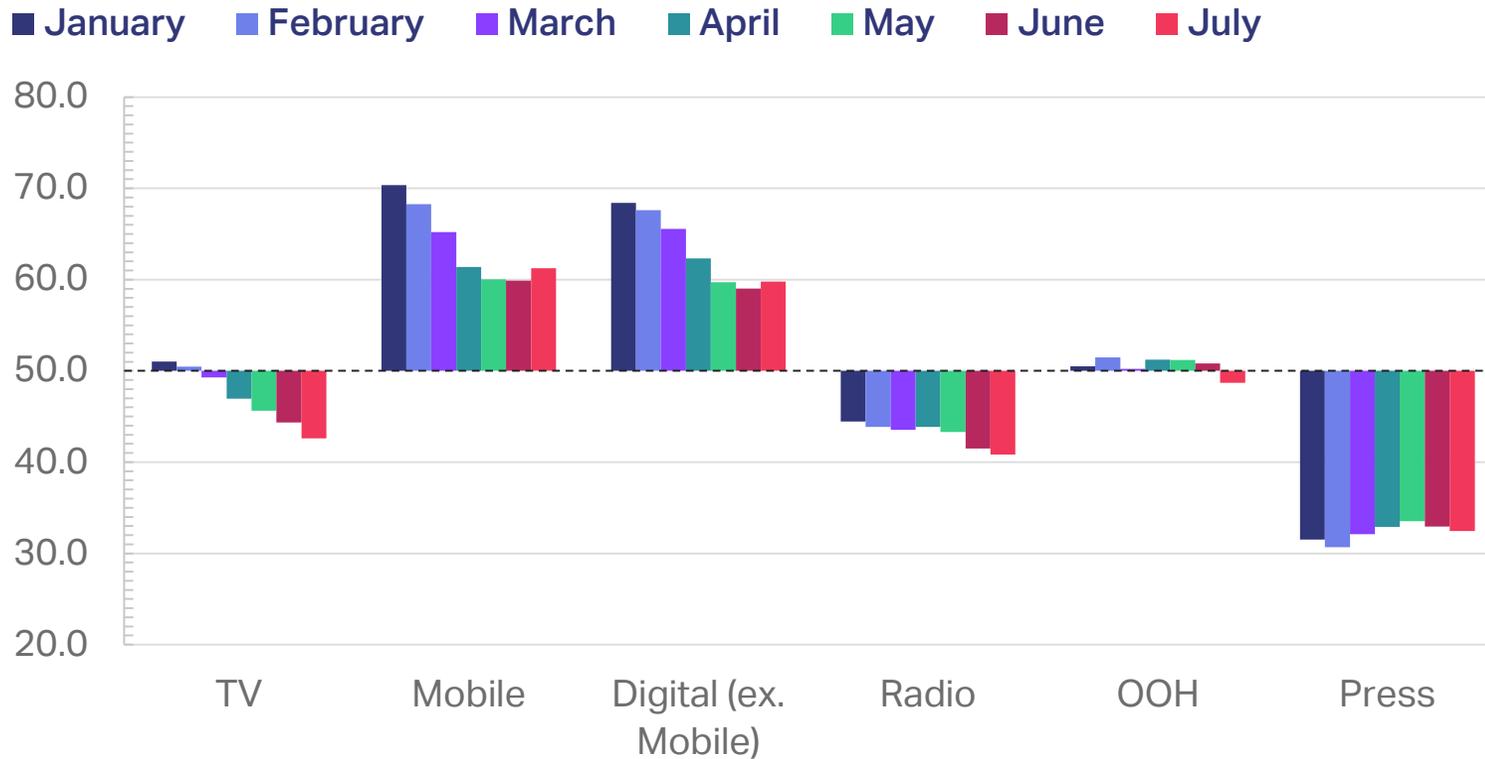
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Latest WARC research

- Global marketing budgets have contracted for the second month running, according to the results from WARC's **Global Marketing Index**, a monthly barometer of marketer sentiment towards trading conditions, budgets and staffing levels. July saw an index value of 46.0, down from June's 48.3 and May's growth of 50.3.
- This was largely a result of rapidly contracting European budgets. Growth has been slowing throughout the year, dropping to an index value of 44.6 last month. This is the largest rate of decline across all three regions.
- The Americas returned to contraction, having registered growth in May. Instead, marketing budgets were flat in June and dropped to 47.7 last month. Whether it continues to the low seen in February remains to be seen.
- Asia Pacific also fell into contraction for the first time since December 2017. July recorded an index value of 49.0, although APAC remains the best performing region.

WARC GMI: Digital growth accelerates while traditional budgets worsen

Global, Marketing budgets by medium, 2019



Note: An index value over 50 indicates budget growth. A value under 50 indicates contraction.

SOURCE › WARC Data, Global Marketing Index, July 2019

Get the data

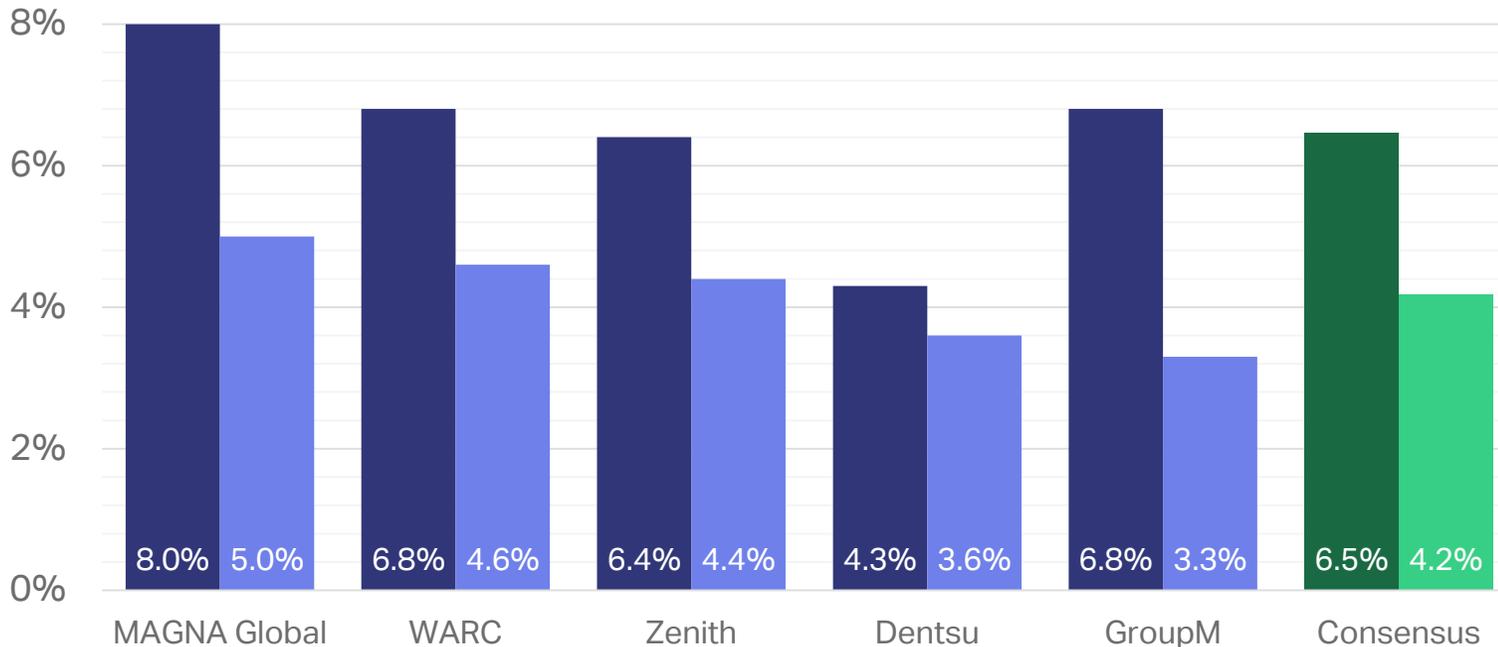
Latest WARC research

- ✔ Digital marketing budgets reversed slowing growth and accelerated last month. Mobile budgets recorded an index value of 61.3 in July, up from 59.9 in June. Digital (ex. mobile) budgets are not far behind on 59.8 last month. This is up from 59.0.
- ✔ TV budgets have slipped further into contraction, down to an index value of 42.6. This was visible across all three regions, with the Americas recording the lowest value at 41.5.
- ✔ Global radio budgets also continue to dip, with an index value of 40.8 down from the 44.5 in January. Asia Pacific is particularly suffering here, with budgets declining by 36.7 last month.
- ✔ Out-of-home (OOH) finally fell into budget contraction, after registering modest but consistent growth throughout 2019. An index value of 48.7 was seen in July, although Europe registered growth at 51.6.
- ✔ Press budgets were indicating slowing decline but contraction has quickened since May. Last month saw an index value of 32.4.

WARC Consensus Forecast: Global ad market growth expected to ease to 4.2% this year

Global, Year-on-year % change in advertising expenditure, US\$ current prices

■ 2018 ■ 2019



Note: Direct comparisons between forecasts are not truly like-for-like as WARC applies variable exchange rates to all years. This has been factored into the weighting to draw a purer consensus.

SOURCE › WARC Data, *International Ad Forecast (August 2019)*; Zenith, MAGNA Global (July 2019), GroupM, Dentsu (June 2019).

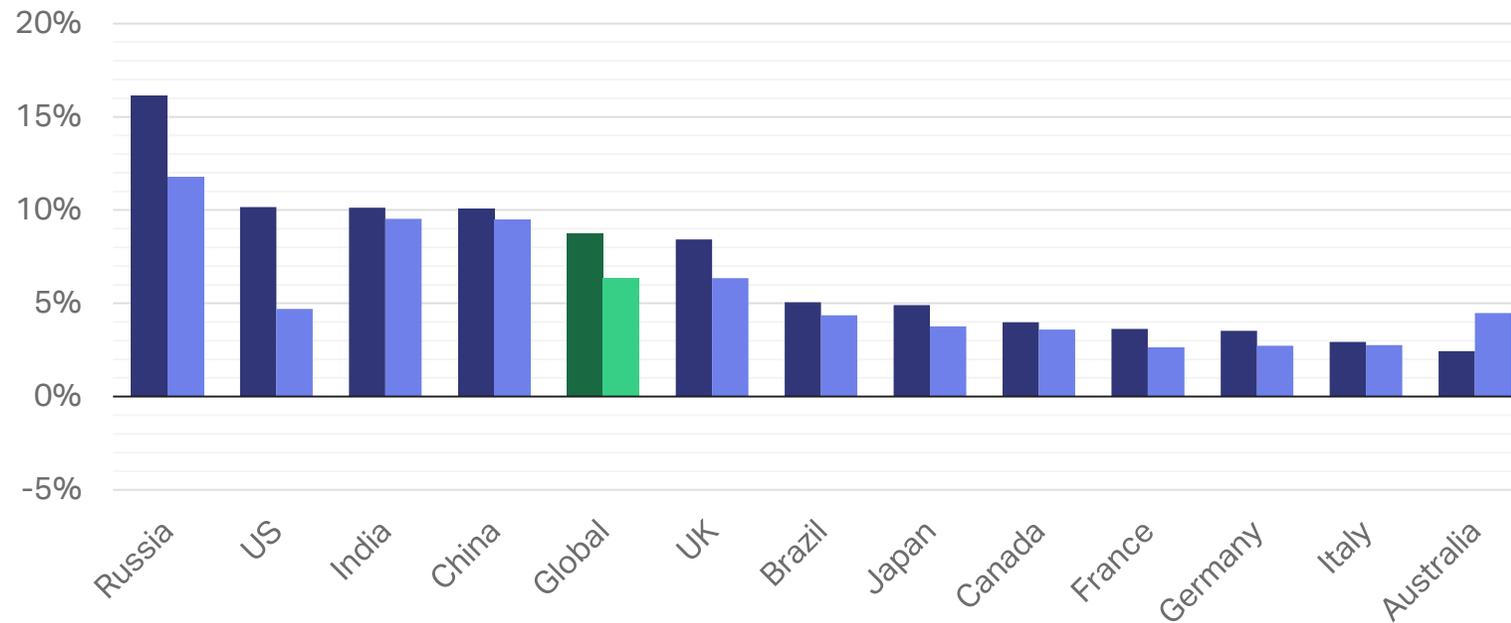
Latest WARC research

- Global advertising spend is expected to rise 4.2% in dollar terms this year, a slowdown from the 6.5% growth rate recorded in 2018, according to WARC's latest Consensus Forecast – a weighted average of third-party growth projections.
- MAGNA Global believes that **the lack of cyclical political and sporting events** will underpin the 2019 slowdown, particularly in the US. But the agency's forecast of 5.0% growth this year is an upgrade from its 4.7% projection in December.
- Dentsu's forecast of 3.6% growth in 2019 represents a downgrade from the 3.8% projection made in January. The agency **cites slowing ad growth in China**, as well as trade tensions between China and the US, as underlying factors.
- Zenith and GroupM also predict a cooling in the rate of global ad market expansion this year, to 4.4% and 3.3% respectively.
- WARC's forecast – **based on 96 markets** – is for 4.6% growth this year, following on from an estimated 6.8% rise in 2018. Ad growth among **WARC's 12 key markets** is expected to be higher this year, at 5.2%.

WARC International Ad Forecast: Global growth expected to slow to 6.4% this year

Year-on-year % change in advertising expenditure, Purchasing Power Parity (PPP), current prices

■ 2018 ■ 2019



Note: Chart ranked by expected growth this year.

SOURCE › WARC Data, International Ad Forecast, August 2019

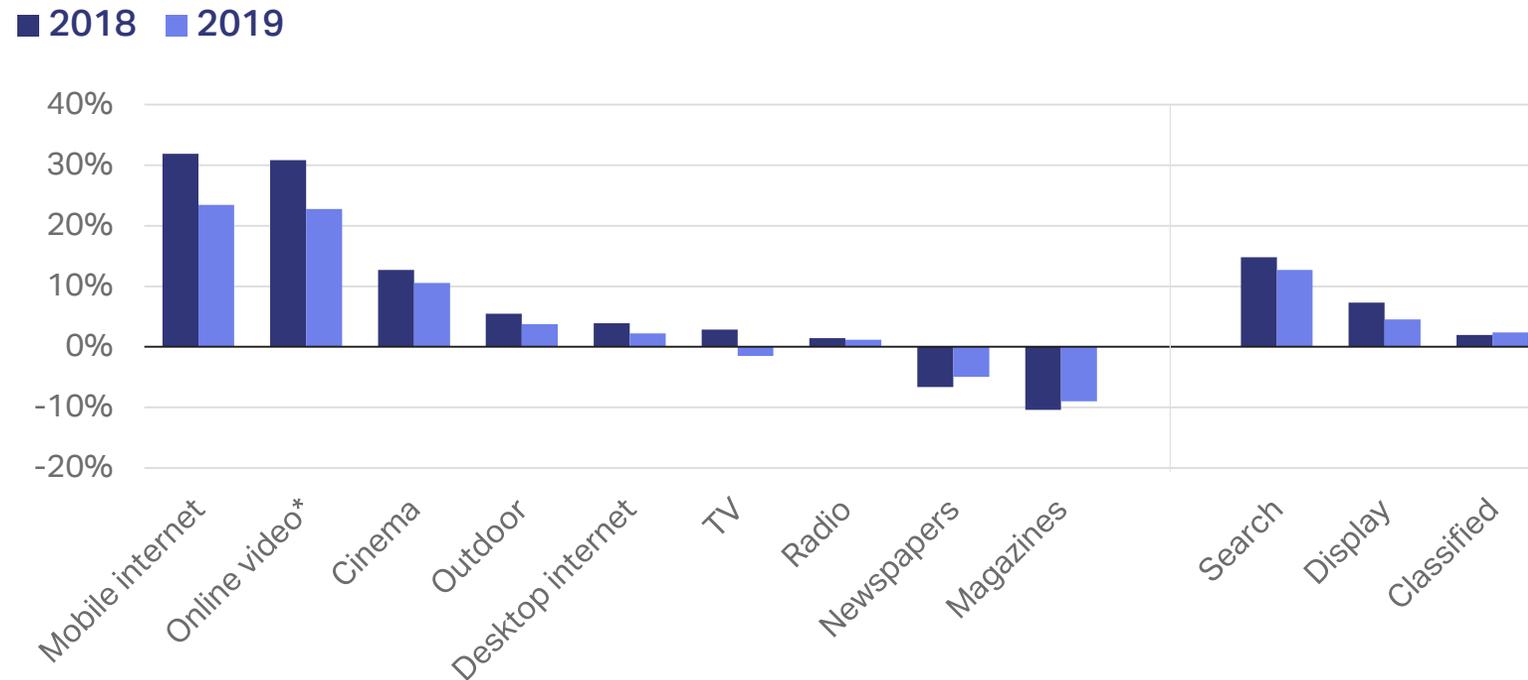
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Latest WARC research

- When assessing ad market growth in Purchasing Power Parity (PPP) terms, which removes the distorting impact of exchange rate fluctuations, data from WARC's [International Ad Forecast](#) show that growth in global ad expenditure is expected to slow to 6.4%, from an estimated 8.8% rise last year.
- Russia is thought to have been the fastest-growing key market last year, with adspend rising by an estimated 16.1% – boosted by the nation's successful hosting of the FIFA World Cup. Russia is expected to lead growth again this year, with spend rising by 11.8% in PPP terms.
- India and China are both expected to record 9.5% growth this year, representative of a mild easing from 2018. The UK is the only other market expected to grow ahead of the global rate (+6.4%) in 2019, though this is heavily dependent upon favourable market conditions following the country's withdrawal from the European Union.
- Growth in the US, the world's largest advertising market by spend, is predicted to drop significantly to 4.7% this year (down from an estimated 10.2% rise in 2018).

WARC International Ad Forecast: Mobile to be the fastest-growing ad medium, driven by online video

Year-on-year % change in advertising expenditure, Purchasing Power Parity (PPP), current prices



Note: *Online video is included in internet growth totals. Chart ranked by expected growth this year.

SOURCE › WARC Data, *International Ad Forecast, August 2019*

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Latest WARC research

- Mobile internet is expected to be the fastest-growing ad medium this year, with spend rising by approximately 23.4% on a Purchasing Power Parity (PPP) basis, according to market data included in WARC's [International Ad Forecast](#).
- Much of the mobile internet growth will come from increased spend on online video, which is also anticipated to record rapid growth (+22.8%) this year. However, this does represent a slowdown from an estimated 30.8% rise in 2018.
- Cinema (+10.5%) is also expected to record double-digit growth this year, driven by a buoyant Chinese market. Cinema growth excluding China is anticipated to be 2.4% this year, down from an estimated 3.5% rise in 2018.
- Outdoor (+3.8%), desktop internet (+2.2%), and radio (+1.2%) are the other media expected to record growth this year. TV spend is expected to dip by 1.5% in 2019, following a 2.9% rise in 2018 – the result of major sporting and political events.
- In terms of ad formats, paid search is forecast to rise 12.7% this year, display by 4.5%, and classified by 2.4%.

More from WARC Data

About WARC Data

WARC has published independent and objective advertising research since 1982.

Our data products are trusted by the world's leading brands, ad and media agencies, media owners, research bodies, academic institutions and market analysts.

www.warc.com/data

Benchmarks

Utilise WARC's suite of benchmarks to measure your ROI against industry sector and geography, decide on the right media mix for your campaign, and compare your ad/sales ratio with the sector's wider performance.

Forecasts

WARC produces detailed adspend forecasts for 12 key markets – Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Russia, UK, US – which between them account for three-quarters of global advertising expenditure, atop a biannual forecast for media inflation drawn from a consensus of exclusive agency data.

Data Points

Access hundreds of pre-made charts and datasets on media consumption, spend and costs.

Databases

Instantly access advertising spend data in 96 markets across major media and formats.

Check CPM and GRP costs by media and target audience in 63 markets.

Global Marketing Index

Established in 2011, the Global Marketing Index (GMI) is designed to provide a unique monthly indicator of expenditure and business conditions for marketers worldwide.

Our panel of 10,000 marketing professionals is invited to give its views of current business conditions, including marketing spend, media budgets and staffing. The results provided exclusively to WARC Data subscribers each month.

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