Global Ad Trends

Ad opportunities in gaming

WARC DATA

07/20

Takeaways

1. Mobile gaming offers a rich opportunity to capture a broad spectrum of users who might not even think of themselves as gamers. Mobile gamers are casual players and skew older than average; 'gamer mums' are influential in purchasing decisions and brand recommendation.

2. Mobile gamers understand the value exchange of advertising. Most are fine with viewing advertising if it keeps the game free-to-play. Ads in mobile games have no discernible impact on churn, and are far more effective than banner advertising when inserted programmatically.

3. Streaming is, for younger audiences especially, the 'new prime time'. Twitch alone draws 1.9m – predominantly Gen Z – viewers per day, mostly after 7pm. Two-thirds of 18–25 year-old gamers would rather play video games or watch gaming content than watch TV.

4. COVID-19-induced lockdowns resulted in a spike in streaming consumption, particularly on Twitch. Within e-sports, however, original audiences consolidated while new viewers proved hard to woo, this despite more content being broadcast in lieu of a traditional sporting calendar.

5. e-sports is becoming established in Asia, with a second-gen evolution into female-led, mobile competition presenting new partnership opportunities. Brand investment is expected to reach $844m globally this year despite great economic turbulence. Media rights will also be core to future revenue gains, and a flurry of merger and acquisition activity is expected in the near term.

3.4bn

Gamers worldwide

4:36

Average gameplay session (h:mm)

3.7

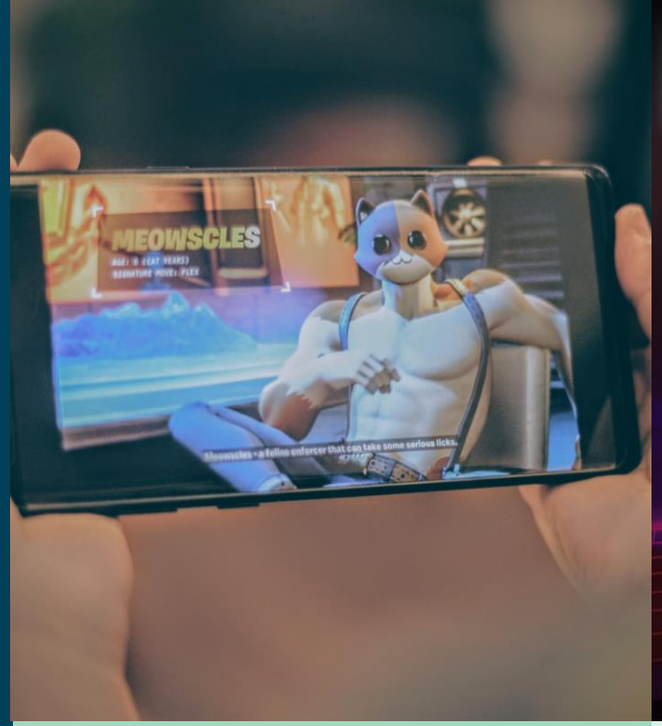
Ads per mobile gaming session

35%

Mobile-only gamers

$844m

Brand investment in e-sports (2020)



Mobile gaming

Generally free-to-play (F2P) games, which are ad supported but also generate publisher revenue from in-app purchases (IAP) or e-commerce elements.

Ad formats include videos, banner and native ads. Reward-based videos, whereby a player receives an in-game reward for watching a video ad, is popular and effective within the genre.

Streamers

Can be regarded as a form of influencer, they broadcast live or on-demand gaming content through platforms such as Twitch, YouTube and Facebook Gaming. Top streamers amass followers in the tens of millions.

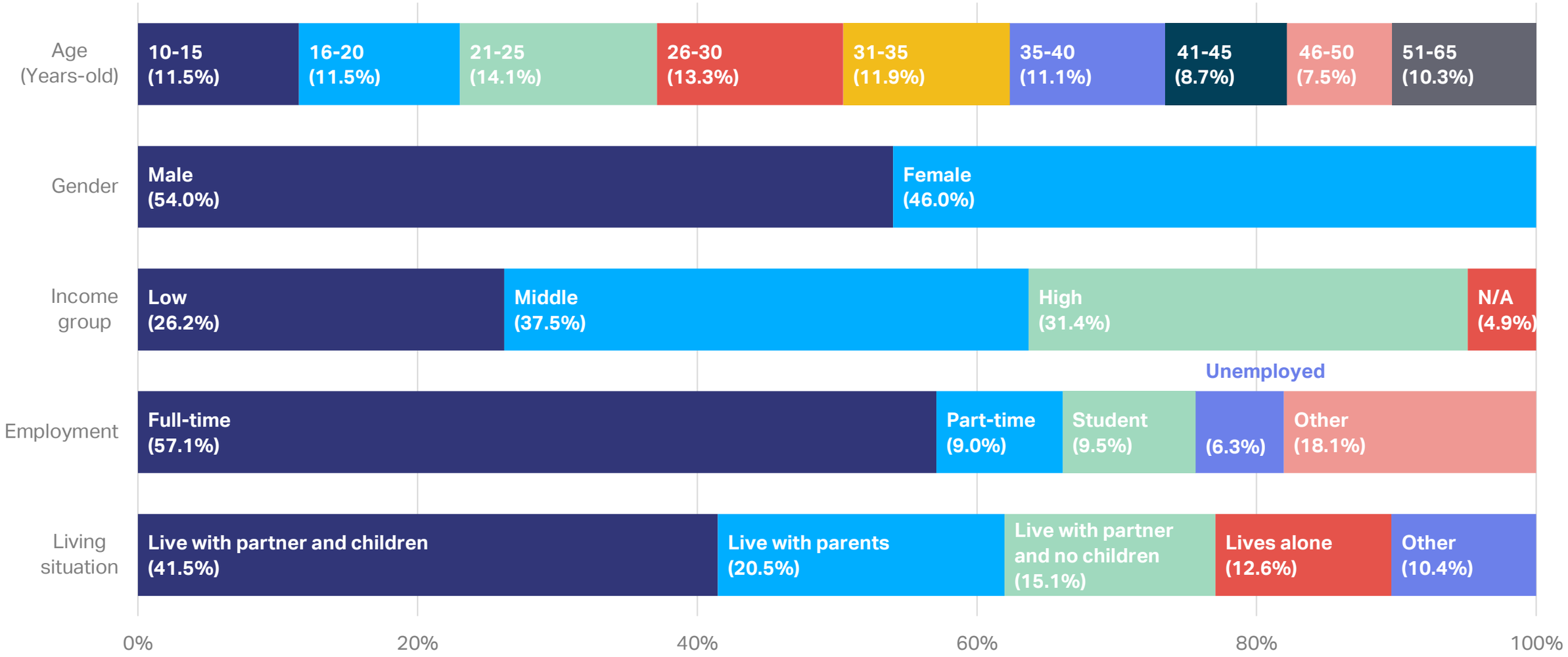
Advertising opportunities here encompass pre/mid/post roll video as well as sponsorships and host-read ads.

e-sports

Competitive gaming which draws mass live and VoD audiences. Games are traditionally PC- and console-based but there is a new, growing market for mobile e-sports, particularly in Asia.

Brands can partner with teams or individual players through sponsorship deals in much the same way as conventional sport.

Global gamer demographics, % of all gamers



Note: Based on consumer research across 30 markets, anyone who has played video games on PC, console or mobile in last six months.
SOURCE: Newzoo

Mobile: the non-gamer's gaming

Mobile gamers are casual players and skew older than average; 'gamer mums' are influential in purchasing decisions and brand recommendation.

Mobile gamers understand the value exchange of advertising. Most are fine with viewing advertising if it keeps the game free-to-play. Ads in mobile games have no discernible impact on churn, and are far more effective than banner advertising when inserted programmatically.

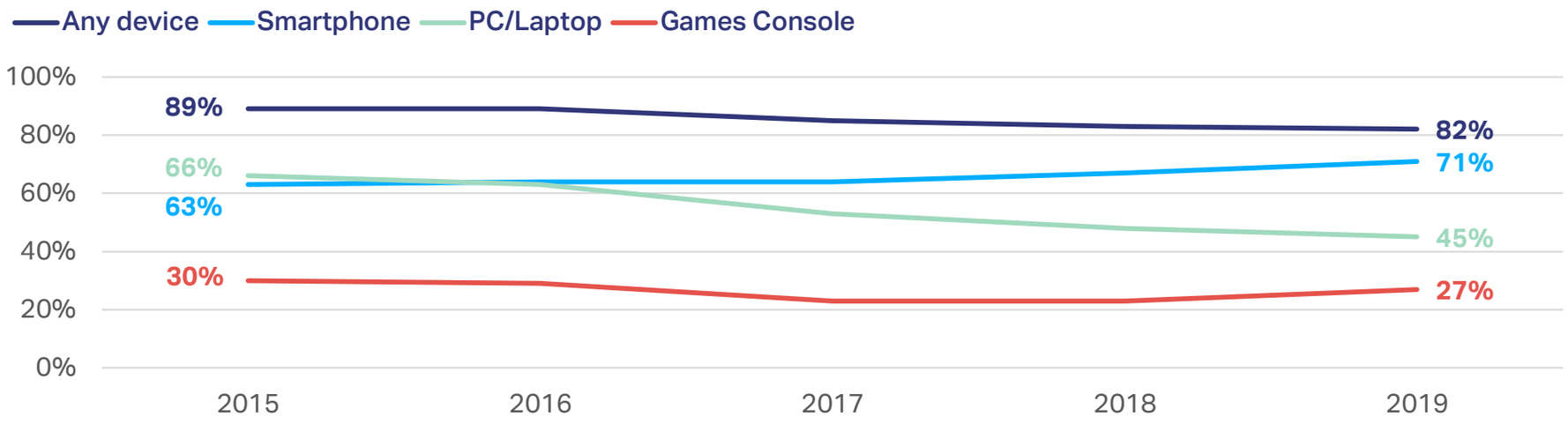
Mobiles are the most popular gaming devices in history

2.9bn people play games on their smartphone, equivalent to seven in ten (71%) internet users. This is up from 63% in 2015 – an absolute increase of one billion worldwide.

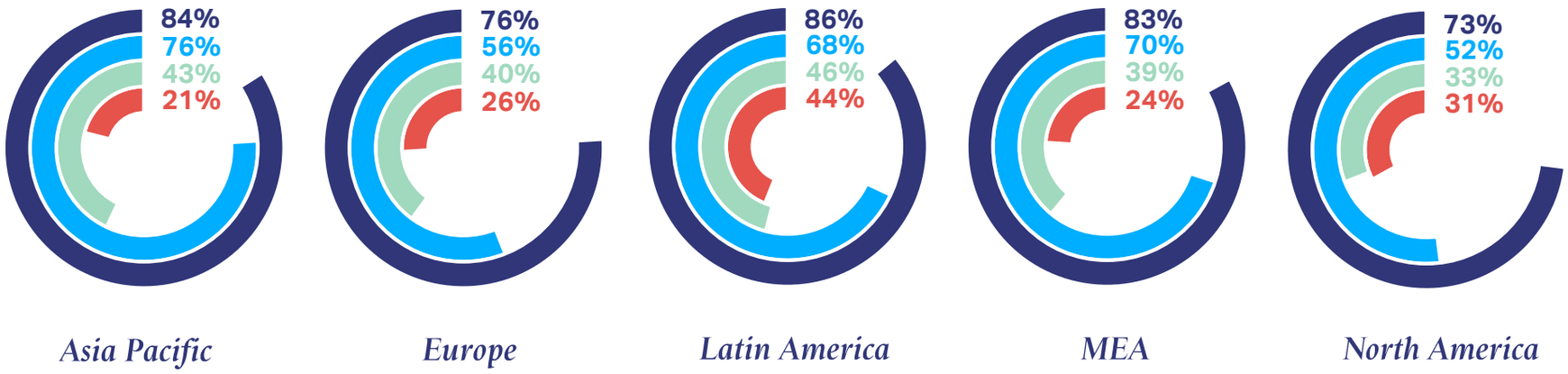
In total, 3.4bn people play games on any device, a rise of 662m since 2015. Yet the proportion of internet users gaming has actually fallen during this period, to 82%.

While the fall mirrors wider device trends over recent years, it is also a reflection of the rise in the consumption of gaming content, with would-be gamers now watching others rather than playing themselves (see page 15).

Global, Devices used for gaming, % of internet users



2019



Note: Based on survey of internet users aged 16-64 across 46 different markets. Q: Which of the following do you use to play games?
SOURCE: GlobalWebIndex

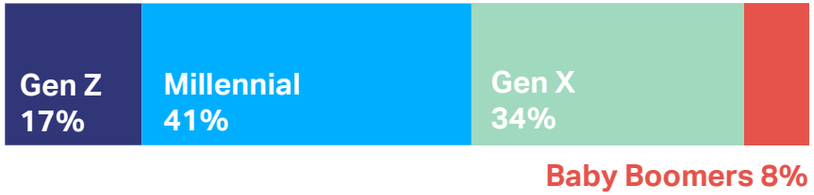
One in three gamers is mobile-only

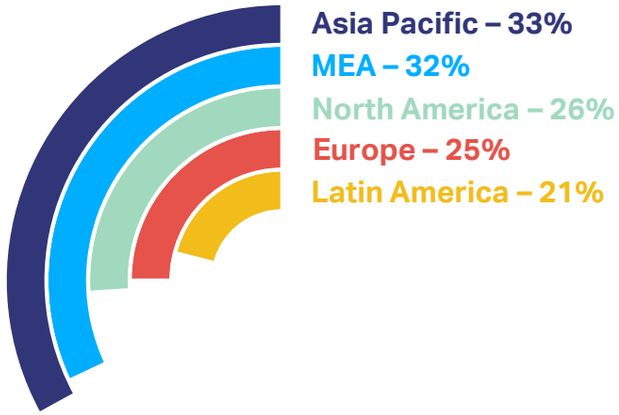
A full 29% of internet users (and 35% of gamers – 1.2bn) are mobile-only, rising to one in three in Asia Pacific and the Middle East and Africa. Israel (46%), Singapore (44%) and Thailand (42%) record the highest domestic rates.

This cohort skews older than the average gamer, and is comprised mostly of females (55% vs. 46% for all gamers).

They are more casual gamers – playing during idle time (on the commute, for example) – and do not engage with typical gaming culture; only one in five (13%) visits Twitch, for example. Instead, mobile-only gamers typically spend 35 minutes longer watching linear TV than other gamers.

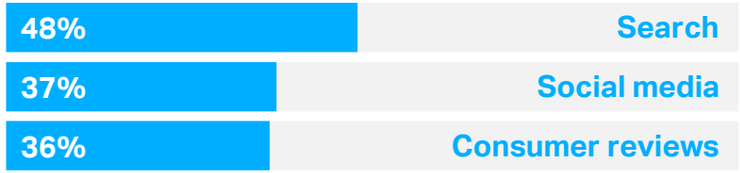
Global, Mobile-only gamers profile



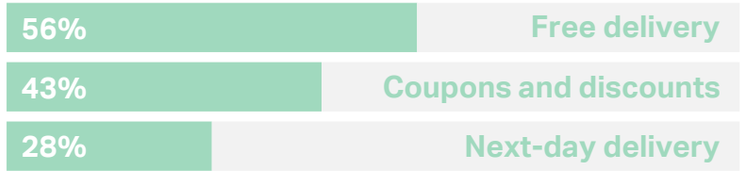


Brand discovery

Sources for product research



Online purchase motivators



Brand expectations

Note: Based on survey of internet users aged 16-64 across 46 different markets.
SOURCE: GlobalWebIndex

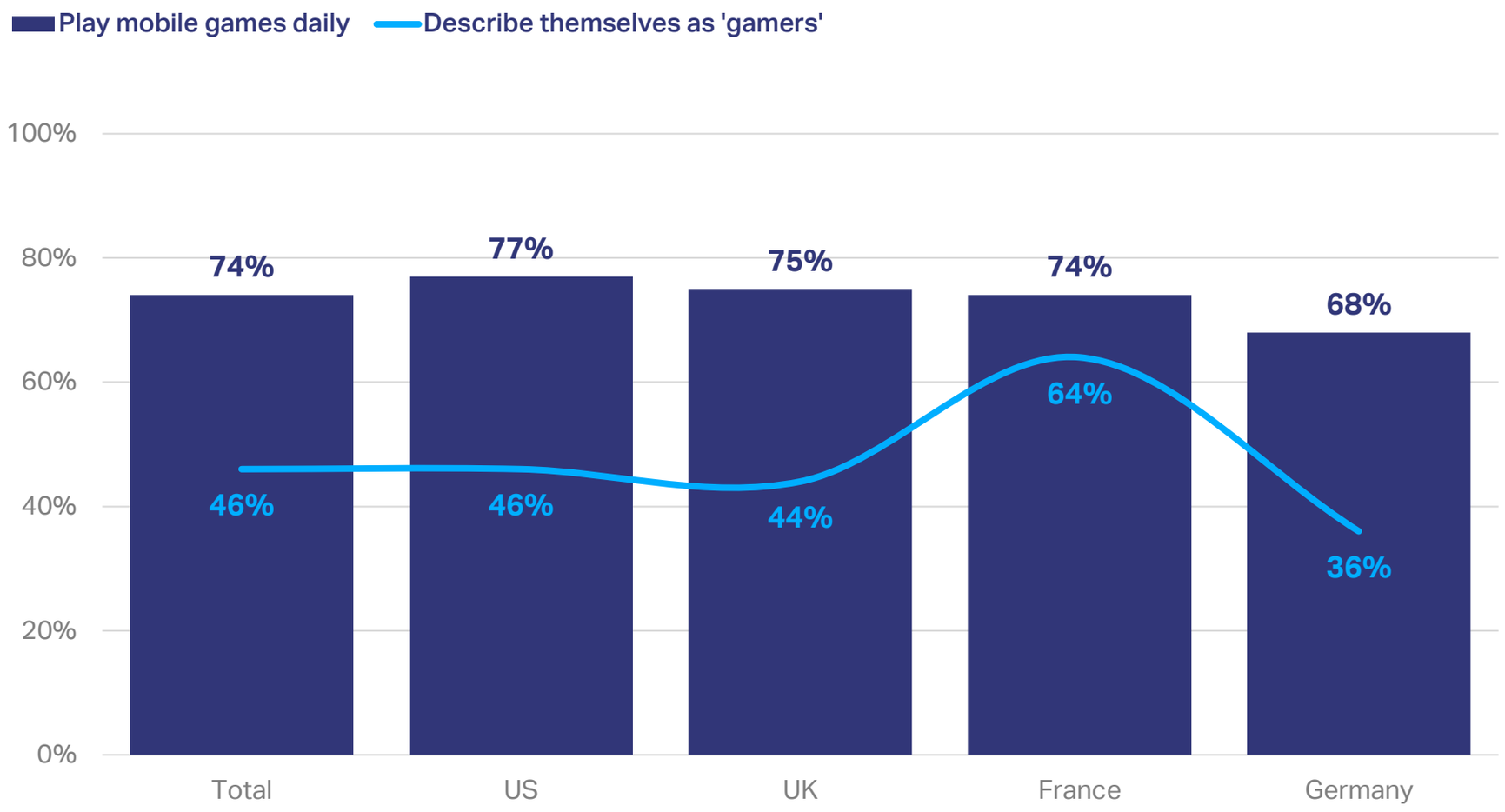
Audiences may not regard themselves as 'gamers'

Many mothers are committed gamers but do not relate to the term – this is particularly true in Western markets.

As a cohort, 'Gamer Mums' are seen to be more receptive to advertising. One in four (26%) appreciates advertising that exposes them to something new, and one in five (21%) likes seeing ads from their favourite brand. Rates among other are 20% and 17% respectively.

This group is also influential; 48% offer advice to friends on purchases (compared to 36% of others), and a third (33%) recommend products on social media (vs. 25% others).

Key markets, 'Gamer Mums'



Note: Based on survey of women aged 25-54 who play mobile or video games and have at least one child at home under the age of 18 (n=4,002).
SOURCE: Activision Blizzard Media

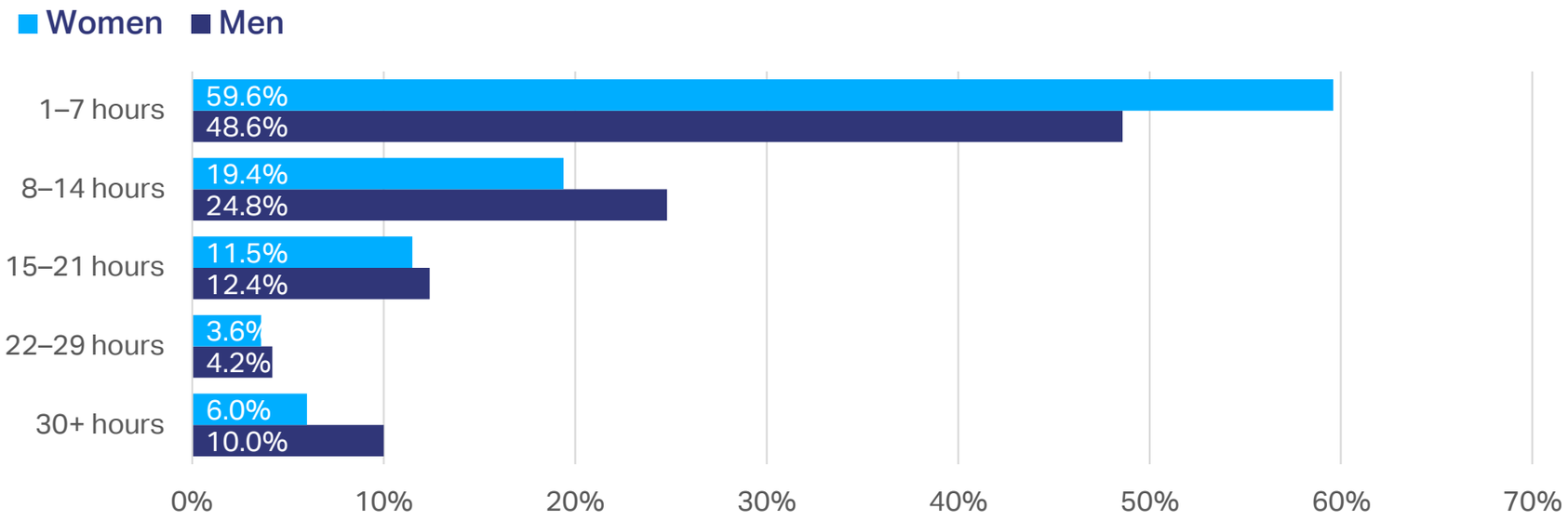
Women are driving growth in Asia

Of the 1.33bn gamers across Asia, 38% are female – equivalent to 500m people and growth of 18% from 2017. Penetration rates vary across the region, from 45% in China, to 40% in Japan and just 18% in India.

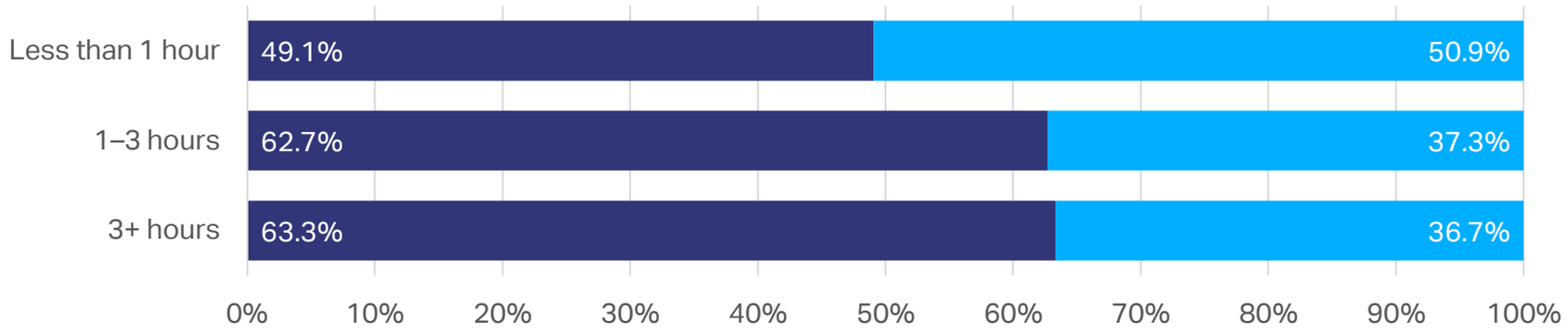
Of the female gamers in Asia, 95% (473m) play on a mobile; they accounted for 35% of all mobile gaming revenue in the region last year, a share that is expected to rise closer to 39% in 2020. In China alone, women spent $6.6bn within mobile games last year.

Aside from casual mobile gaming, women are also driving mobile e-sports in Asia, with female-only teams and leagues emerging fast.

Asia, Session length, % share of gamers, All devices



Asia, Mobile sessions by gender, % share of total sessions



SOURCE: Google, Niko Partners

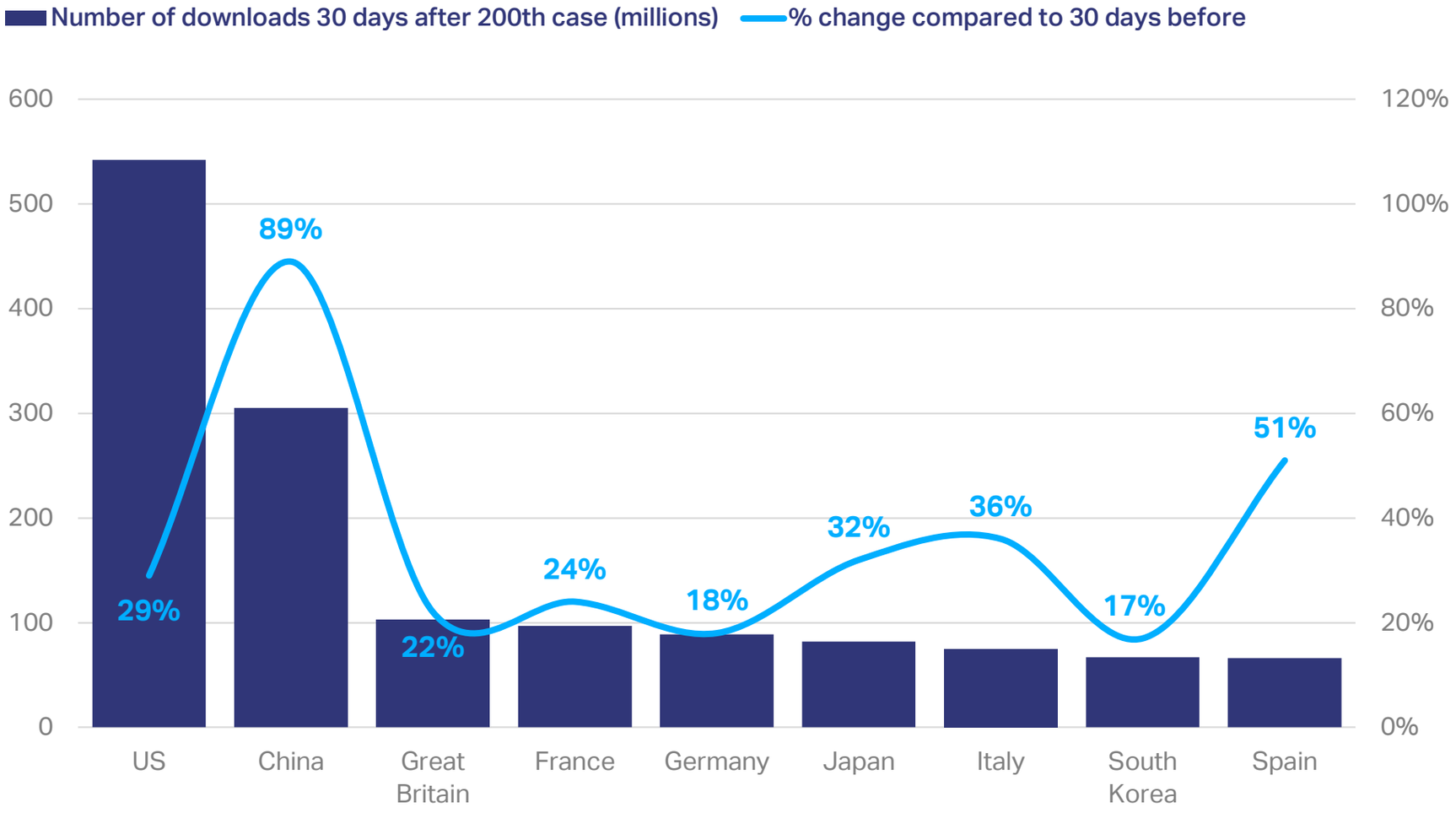
Mobile gaming skyrocketed during COVID-19

Downloads of mobile gaming apps hit 847m in a month across the US and China alone. This compares to 60bn gaming app downloads globally during 2019.

Data show that 96.8% of Chinese female mobile gamers spent more time playing during lockdown, and 78.0% spent more money in-game than they had before.

Overall, mobile gaming recorded the greatest rise in share of online time in China during lockdown. Almost nine in ten Chinese respondents to a Niko Partners survey stated they would game for longer after lockdown as a result.

Global, Gaming app downloads during COVID-19



Note: Chinese data is Apple App Store only, all other markets include Google Play.
SOURCE: Sensor Tower

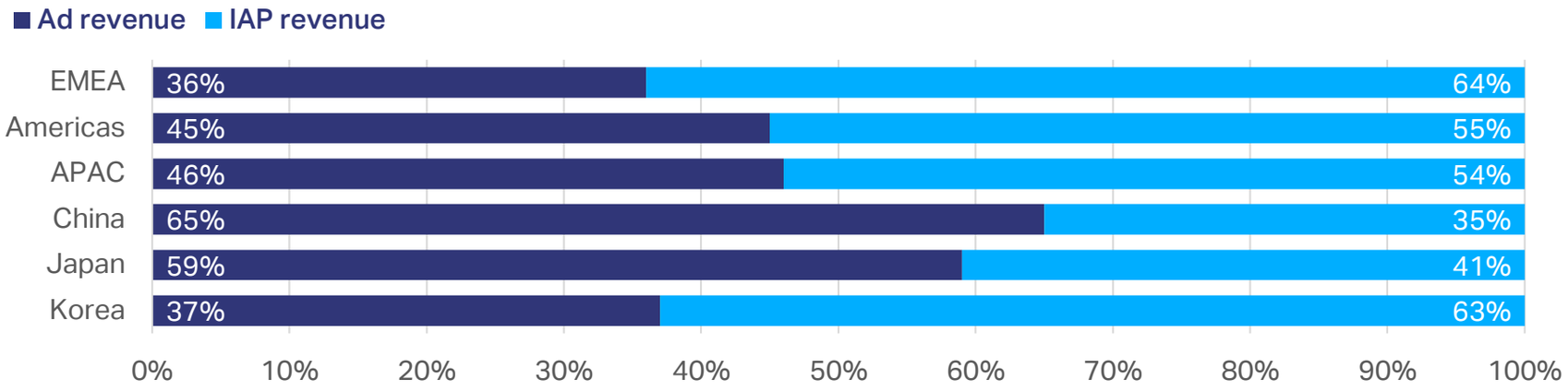
Ads are not yet the primary revenue source for publishers

They provide 42 cents in every dollar on average, with in-app purchases comprising the bulk of publisher income. China and Japan over-index.

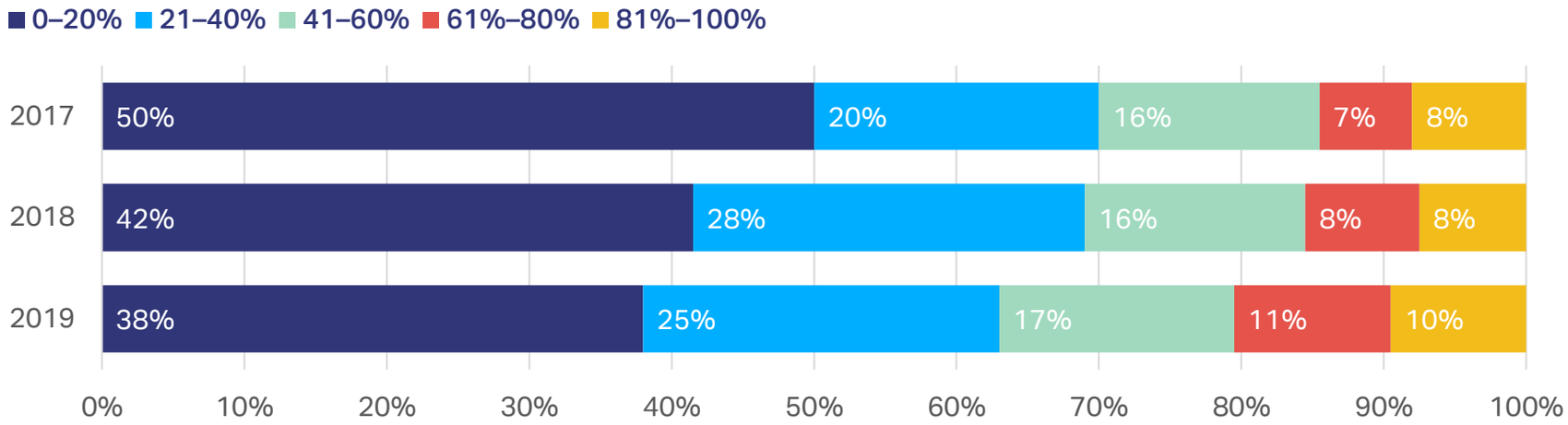
Ads are contributing more to the bottom line, however, and two in five (42%) publishers have no concerns this will cannibalise IAP income.

A third (32%) of publishers use an exchange to insert ads into their games, with half (50%) leveraging between two and five and 22% using six or more. Programmatic in-game ads perform much better than traditional banner advertising, and sharper ad measurement will help the industry to evolve long-term.

Key markets, Publisher revenue by type, % share of total



Global, Advertising's share of publisher revenue, % share of publishers



Note: Average across all game types. n = 284 publishers. IAP is in-app purchases.
SOURCE: DeltaDNA

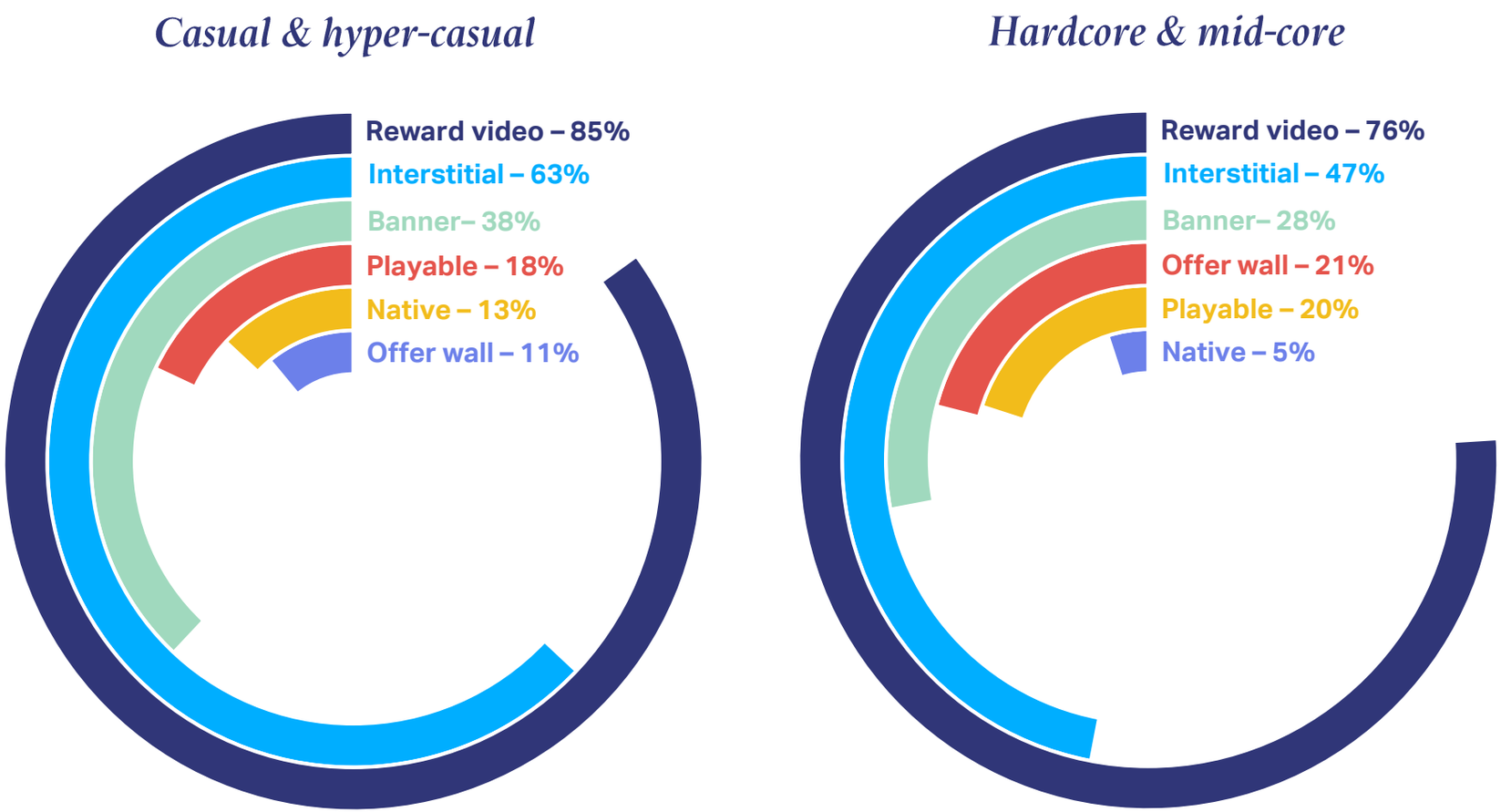
Gamers understand the value exchange of advertising

More than two thirds (68%) of publishers use one or more advertising format in-game, up from 56% in 2018. A third use three or more.

The most common format is a reward video, whereby the player receives an in-game boost as an incentive to complete a video ad. This format is largely unique to mobile gaming, but its adoption and the subsequent 'gamification' of apps in the fitness and dating sectors is an emerging trend.

Gamers understand the value exchange; 57% of are OK with advertising if its keeps the game free, rising to 70% among Americans.

Global, Mobile gaming ad formats by game type, % share of publishers adopting



Note: n = 284 publishers. A hyper-casual game is a mobile video game which is easy-to-play and features a very minimalistic user interface. A casual game is targeted at a wide, mass market audience, and generally has simpler rules, shorter sessions, and requires less learned skill. Mid-core games are more complex than hyper-casual and casual games, requiring players to make time to play, rather than playing opportunistically or sporadically. Hardcore games require advanced skill and are played in longer sessions.

SOURCE: DeltaDNA

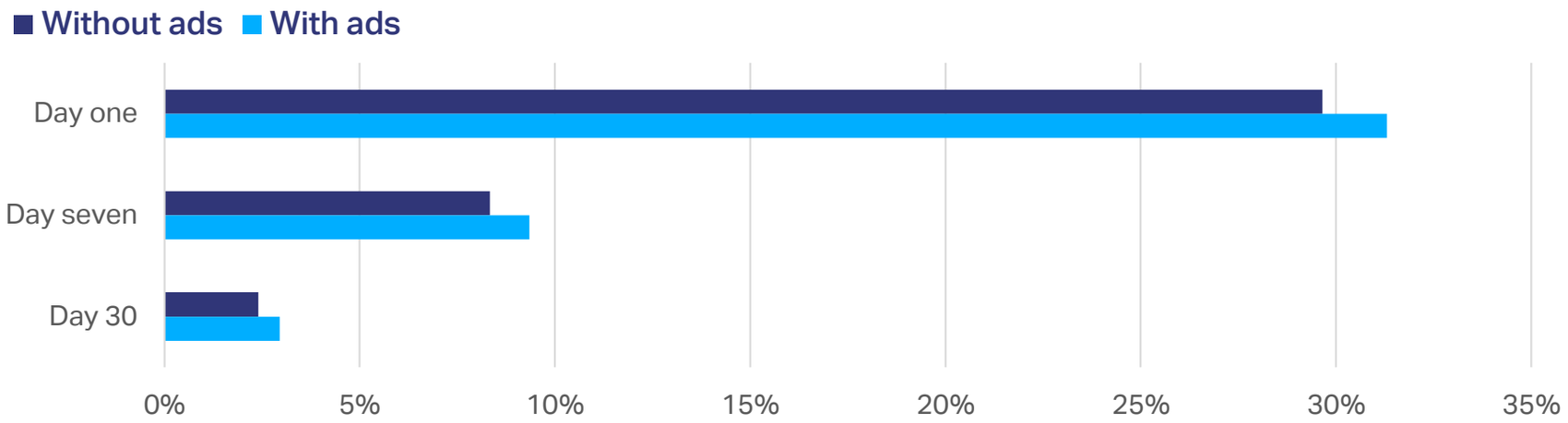
Ads do not detract from the gaming experience

Mobile gamers see 3.7 ads per session on average, though volumes are often higher than this across hyper-casual and casual titles.

The most common concern among publishers is that too many ads will increase churn, yet Unity finds that player retention is actually slightly higher among games with ads.

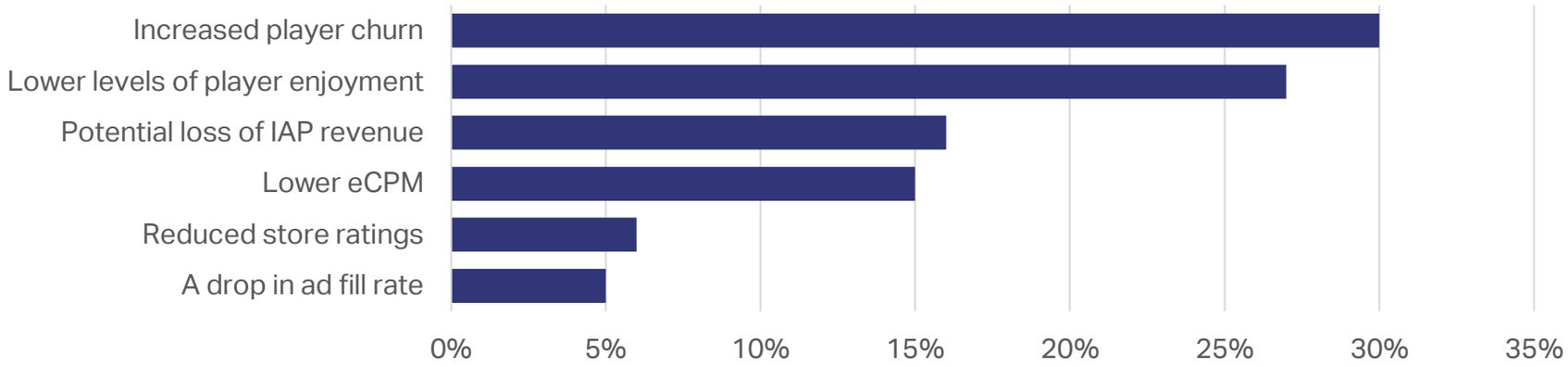
Facebook research suggests ads do not detract from enjoyment either – another common concern. Indeed, certain formats may heighten the experience: having the ability to decide whether to engage or not in watching the ad results in a 10–15% uplift in a game's app store rating.

Global, Mobile gaming app retention, % share of new downloads



SOURCE: Unity

Global, Concerns around ad hosting, % share of publishers



SOURCE: DeltaDNA

Streaming killed the TV star?

Streaming is, for younger audiences especially, the 'new prime time'. Twitch alone draws 1.9m – predominantly Gen Z – viewers per day, mostly after 7pm. Two-thirds of 18–25 year-old gamers would rather play video games or watch gaming content than watch TV.

Two in five 16–24 year-olds regularly watch gaming streams

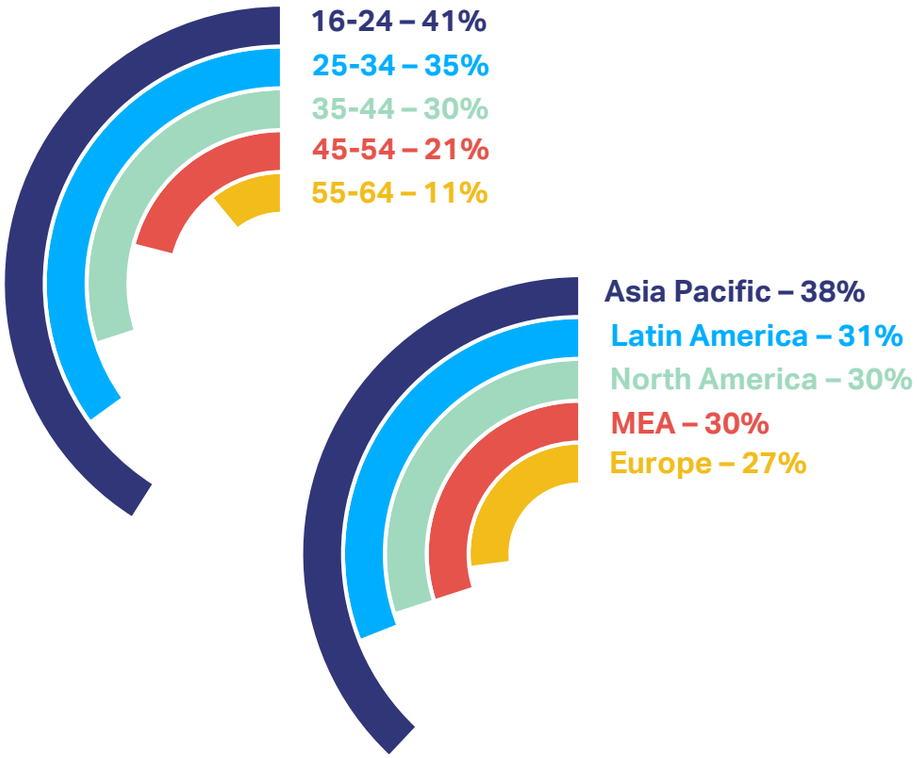
Streamers can be seen as a specialist form of influencer, and the usual playbook for brand partnerships will apply.

As with other influencers, streamers deliver audiences ranging from a few thousand to tens of millions, but in any case they command a strong affinity with their audience.

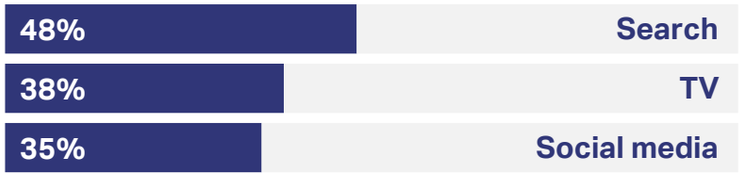
Brand collaboration is already common – Mastercard, Chipotle, HTC and Dr. Pepper all have direct associations with top Twitch streamers.

GlobalWebIndex finds that the most distinctive brand advocacy motivation among streamers is to enhance their reputation and status.

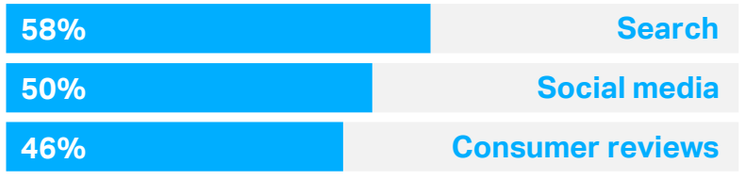
Global, Streaming audience profile



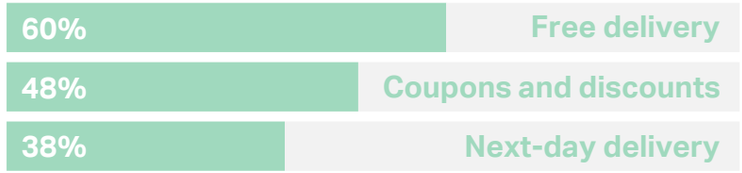
Brand discovery



Sources for product research



Online purchase motivators



Brand expectations

Note: Based on survey of internet users aged 16-64 across 46 different markets that have watched a live game stream in the last month.
SOURCE: GlobalWebIndex

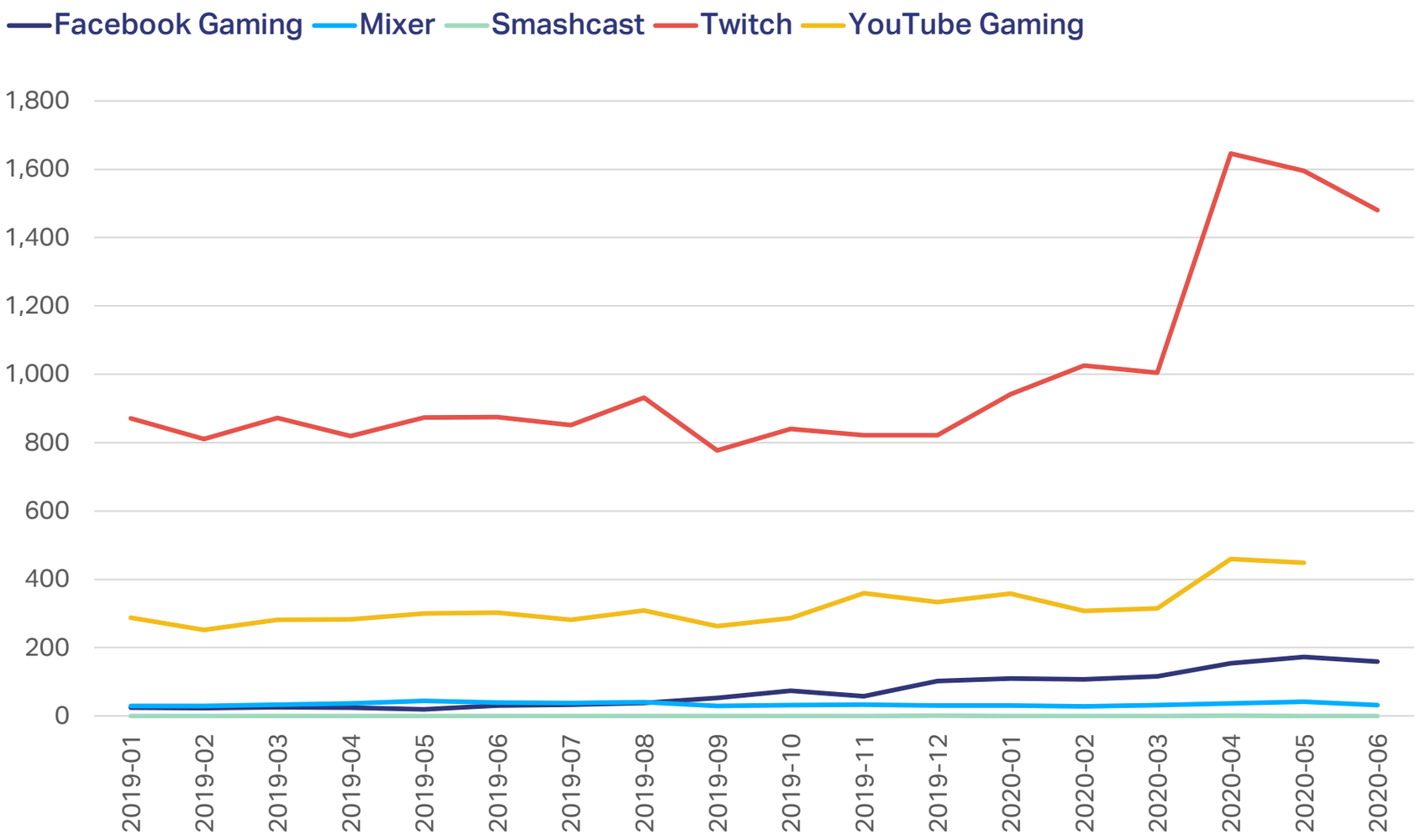
Twitch topped one billion hours during COVID-19 lockdown

Amazon-owned Twitch is the dominant platform, averaging 846.9m hours of gaming content viewed per month in 2019. This is more than double all other major platforms combined.

The COVID-19 lockdown drove Twitch consumption to new highs, and while most of the surge has been retained, total hours are now trending downwards as lockdown conditions ease.

Tencent is looking to disrupt the landscape with the launch of Trovo – an analogous platform to Twitch – in the US this year. The move comes as Microsoft's Mixer closed in July 2020 due to poor uptake.

Global, Cumulative hours of gaming content watched per month, Millions



Note: No YouTube data for June due to a change in algorithm.
SOURCE: Arsenal.gg

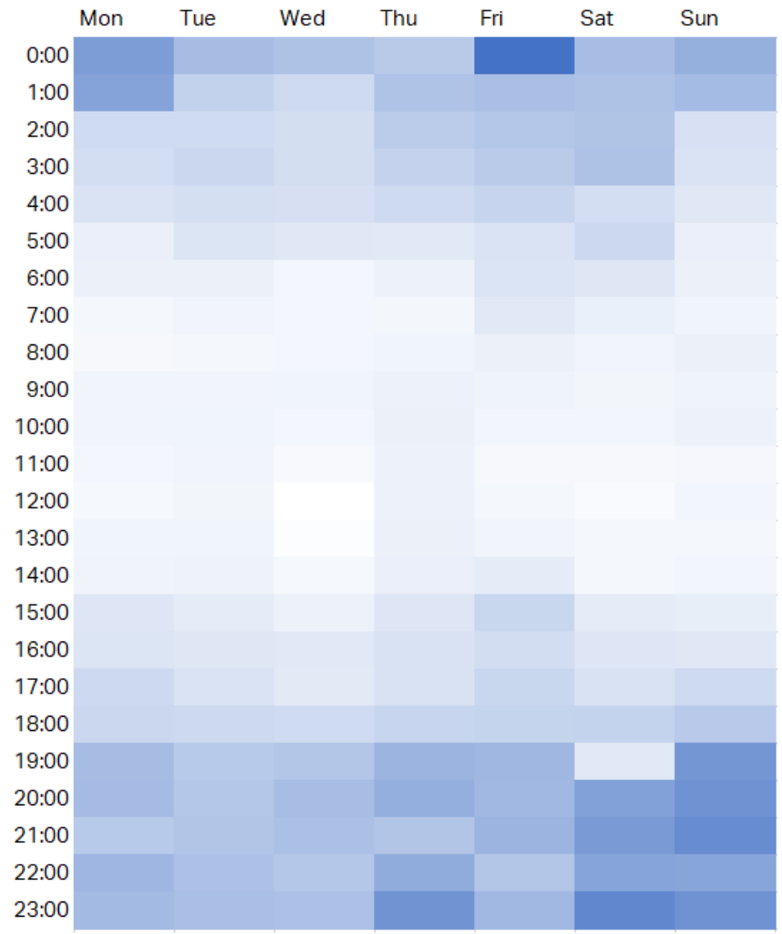
Twitch viewing occupies traditional prime time TV slots

Streams on Amazon-owned Twitch draw 1.9m viewers per day, each watching 3.4 hours of content. 'Just chatting' – a catch-all term for streams in between gameplay – is the most popular content type; it allows viewers to interact with the host via chat messaging, building affinity.

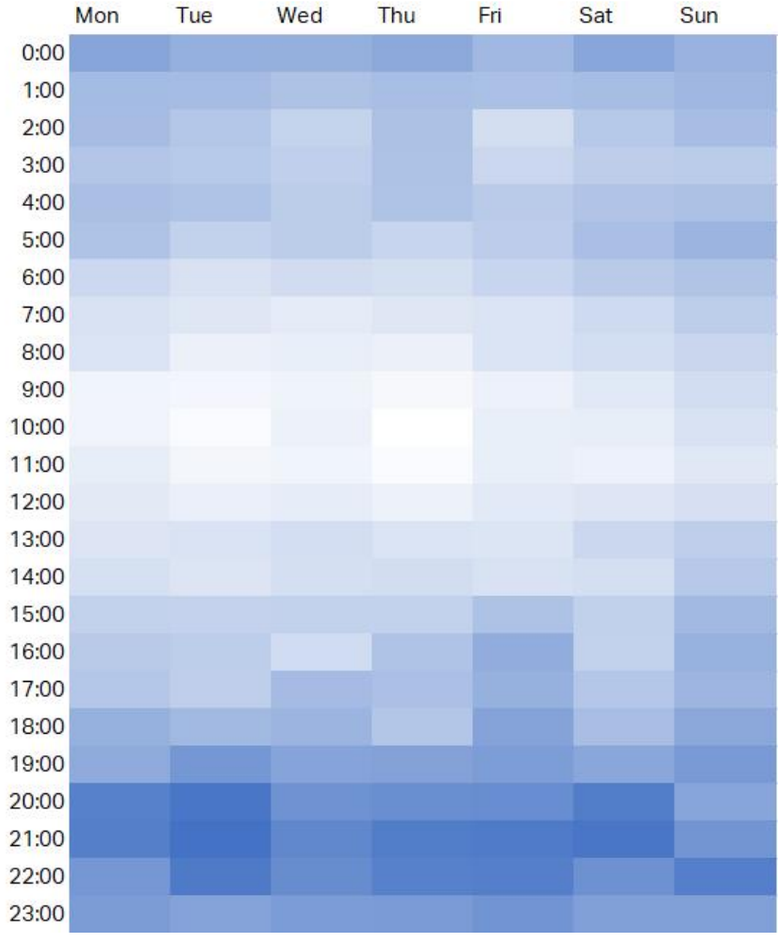
Ancillary research shows that two in three (67.5%) 18–25 year-old gamers would rather play video games or watch video game content than watch TV. The rate is the same among 26–35 year-olds (66.8%) and remains high among 36–45 year-olds (59.6%). Only among those aged 46 and over does the preference shift to TV.

Global, Twitch viewing by daypart

Fortnite



"Just chatting"



Note: Darker segments denote greater activity.
SOURCE: Arsenal.gg

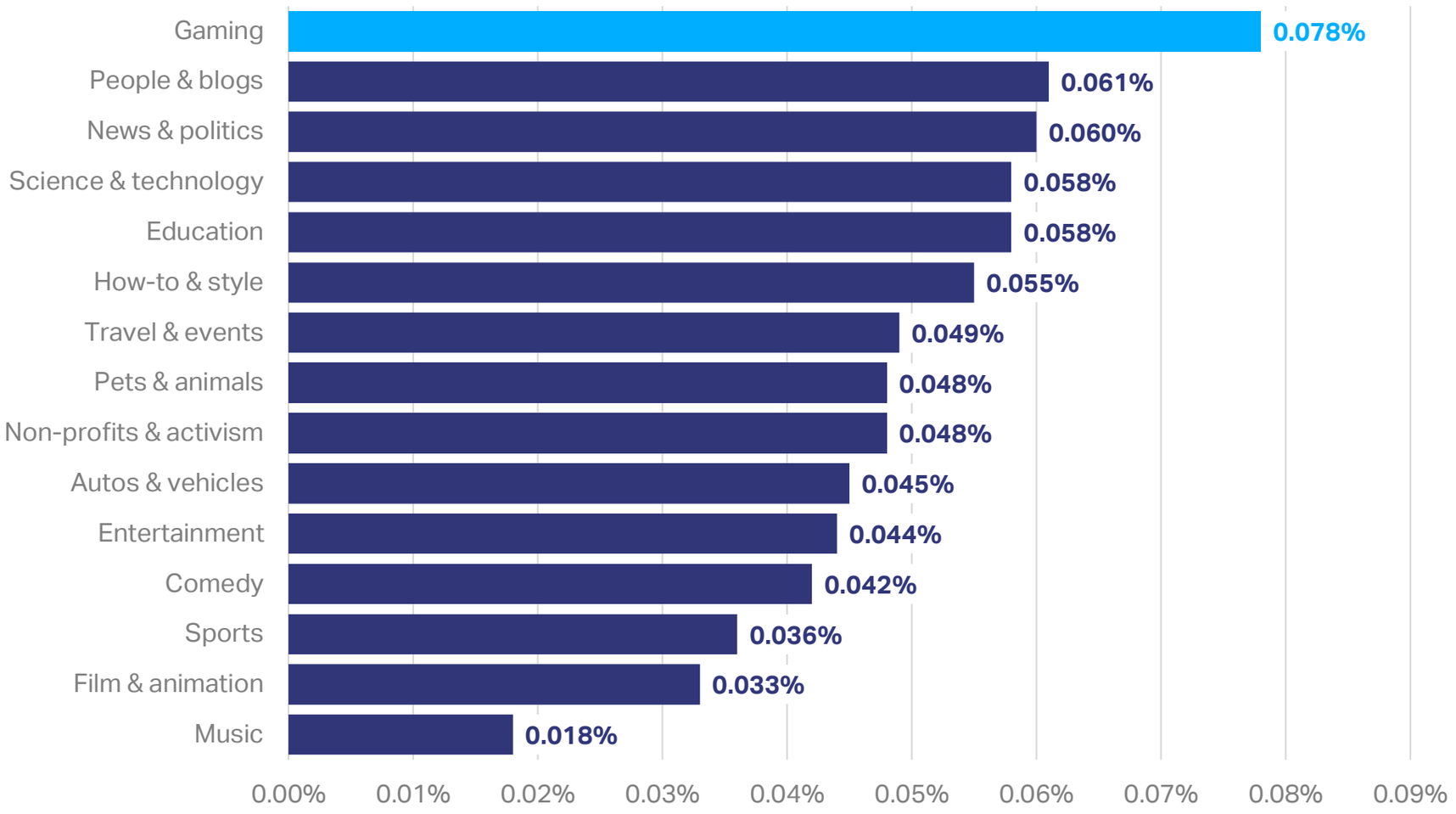
Gamers record the highest engagement rates on YouTube

Eight in every ten thousand viewers of gaming content go on to comment on the video – the highest engagement rate across all YouTube content types. These videos also garner the most likes, at a rate of 5.5 viewers in every 100.

These above average engagement rates speak to the affinity audiences have with gaming influencers. Brands looking to work with these streamers – either through sponsorships or host-read ads – should ensure the partnership feels genuine.

Determining ROI from an influencer campaign remains a challenge, however.

Global, YouTube engagement by content type, % of viewers that commented



Note: Based on analysis of 116 million videos on 104,899 YouTube influencer channels across 180 different countries.
SOURCE: InfluencerDB, *YouTube Benchmarks Report: March 2020*

Asia leads on e-sports

e-sports is becoming established in Asia, with a second-gen evolution into female-led, mobile competition presenting new partnership opportunities. Brand investment is expected to reach $844m globally this year despite economic turbulence.

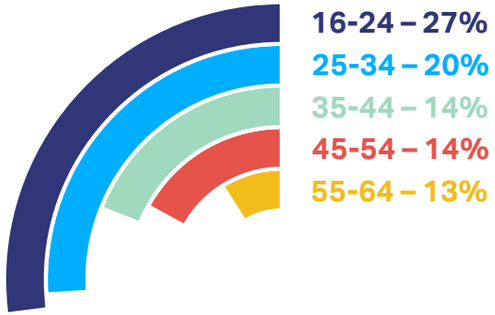
Western markets are lagging and new audiences proved hard to woo during lockdown. Media rights will be core to future revenue gains, and a great deal of merger and acquisition activity is expected as investors vie for control.

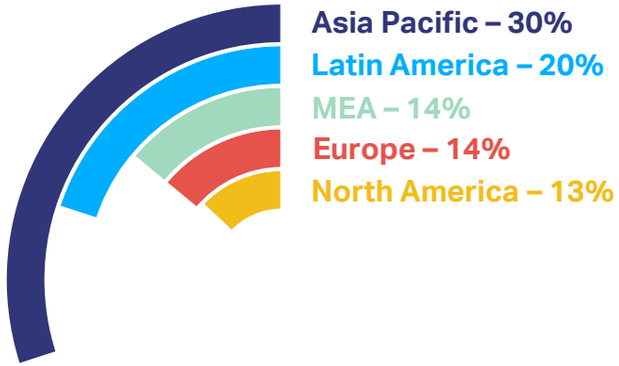
e-sports penetration is approaching one billion worldwide

More than one in four (27%) male internet users has watched an e-sports tournament in the last month, equivalent to 554m people. The rate among females is far lower at 17% (349m), placing the total audience at just over 900m viewers worldwide.

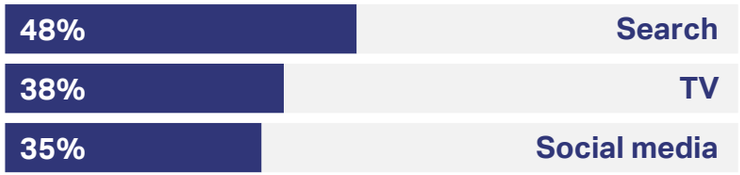
Penetration is highest in Asia at almost one in three (30%) internet users, and uptake is greatest among 16–24 year-olds. Ancillary data from Limelight Networks show that gamers within this age cohort watch 6:19 (h:mm) of e-sports content a week on average, over an hour longer than they spend watching traditional sporting content (5:10).

Global, e-sport audience profile

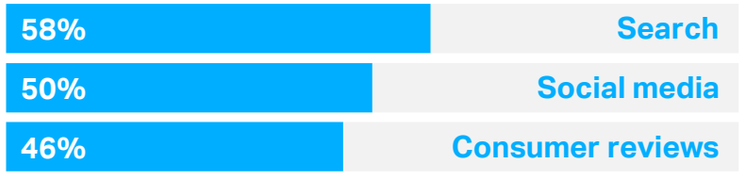




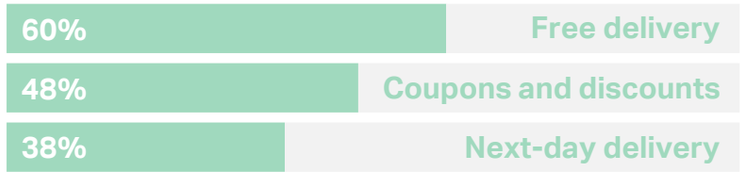
Brand discovery



Sources for product research



Online purchase motivators



Brand expectations

Note: Based on survey of internet users aged 16-64 across 46 different markets that have watched an e-sports tournament in the last month.
SOURCE: GlobalWebIndex

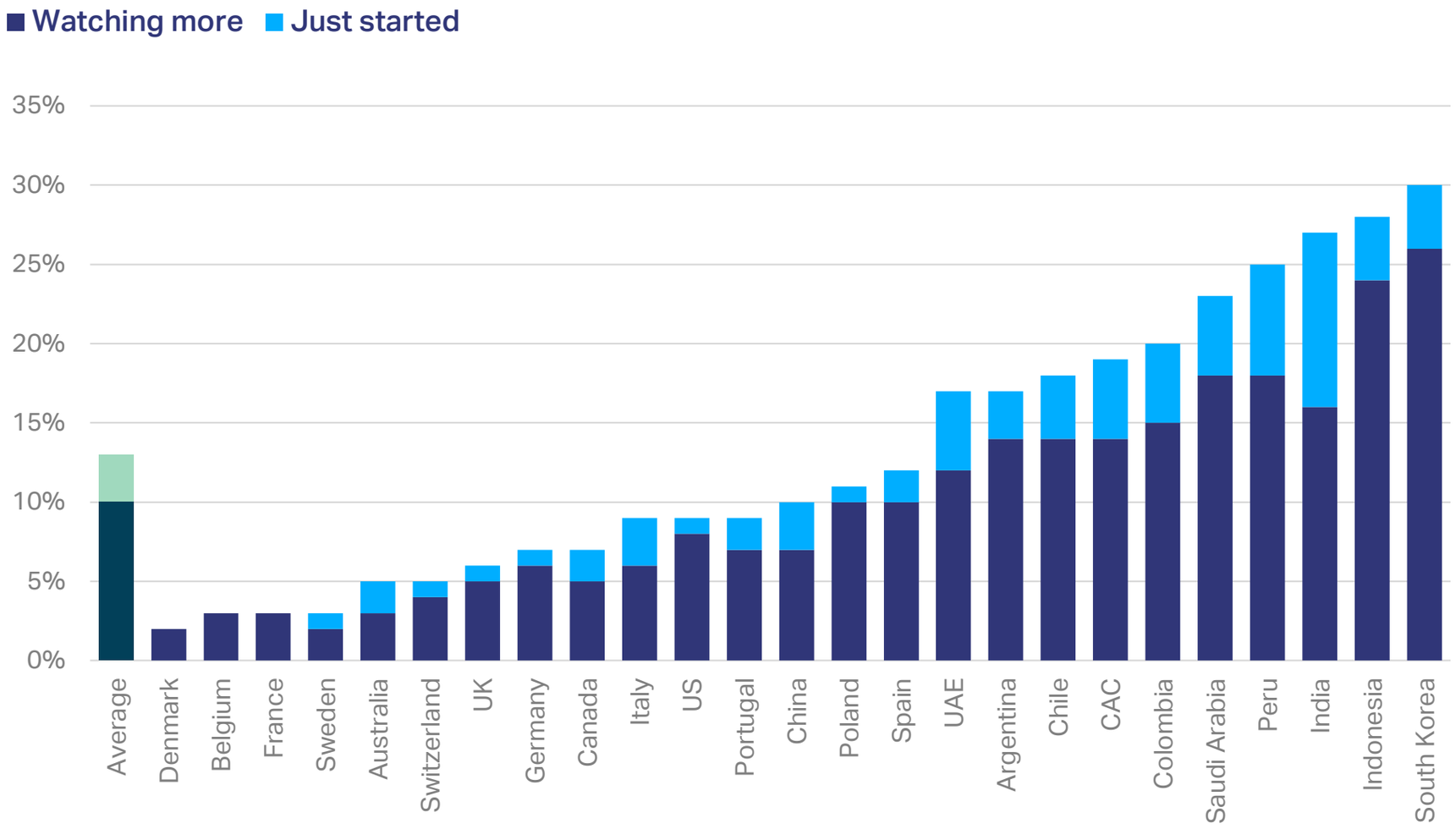
Existing audiences consolidated during COVID-19 lockdown

Just 3% of adults said they started watching e-sports during April, when many markets were at the height of the COVID-19 outbreak. Instead, existing viewers were consuming more – this was true of one in ten on average.

Newzoo finds that only 45% of all e-sports viewers can be regarded as enthusiasts (those who watch frequently and interact with content), while the majority (55%) are occasional viewers.

Almost three in five (58%) enthusiasts are located in Asia, per Newzoo, while South Korea, India and Indonesia recorded the highest uptick in consumption rates in April.

Key markets, e-sports viewing in April 2020, % of consumers aged 18+



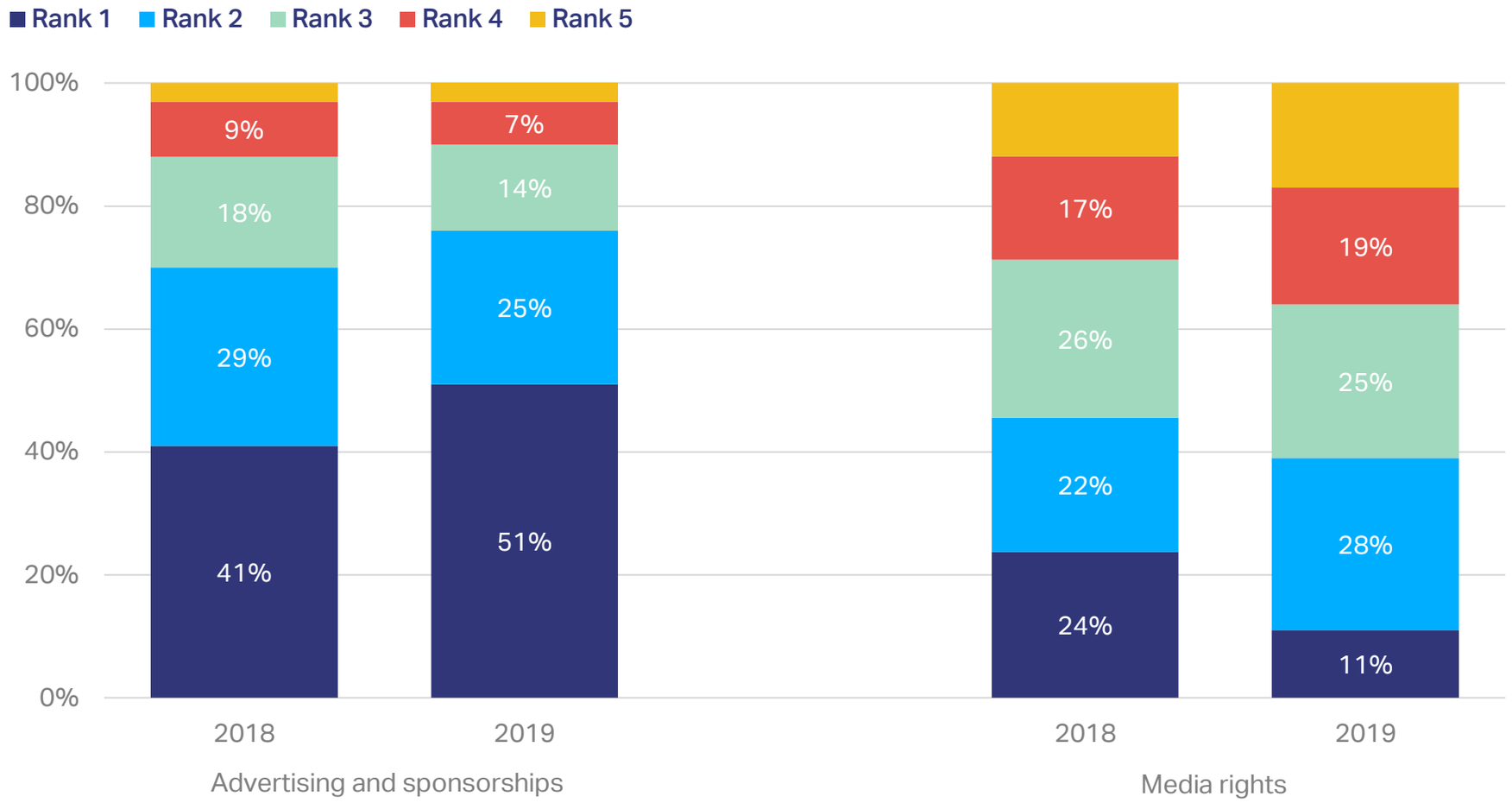
Note: Based on survey (n=845 per market, on average) representative of populations aged 18+, April 2020. CAC is Central America and Caribbean.
SOURCE: McKinsey & Company

Advertising and sponsorships are of growing importance to the e-sports industry

Practitioners believe brand spend will be the key driver of e-sports growth in the coming years, but also expect venture capital firms to up investment – the sign of a maturing market. The US and China are seen to offer the best investment opportunities at present.

Foley notes that as publishers work to expand the reach of their games – and as traditional television networks seek to tap into ad revenue around gaming leagues – interest in media rights deals will rise. Almost two in three (62%) practitioners believe broadcasting will be the area in which most M&A activity will occur in 2020/21.

Global, Expected drivers of e-sports revenue growth, % share of respondents



Note: Q: Rank the following from 1 being the area that will account for the greatest amount of growth the e-sports industry experiences over the next year to 5 being the area that will account for the least growth. Other options not shown above. n = 204

SOURCE: Foley & Lardner LLP

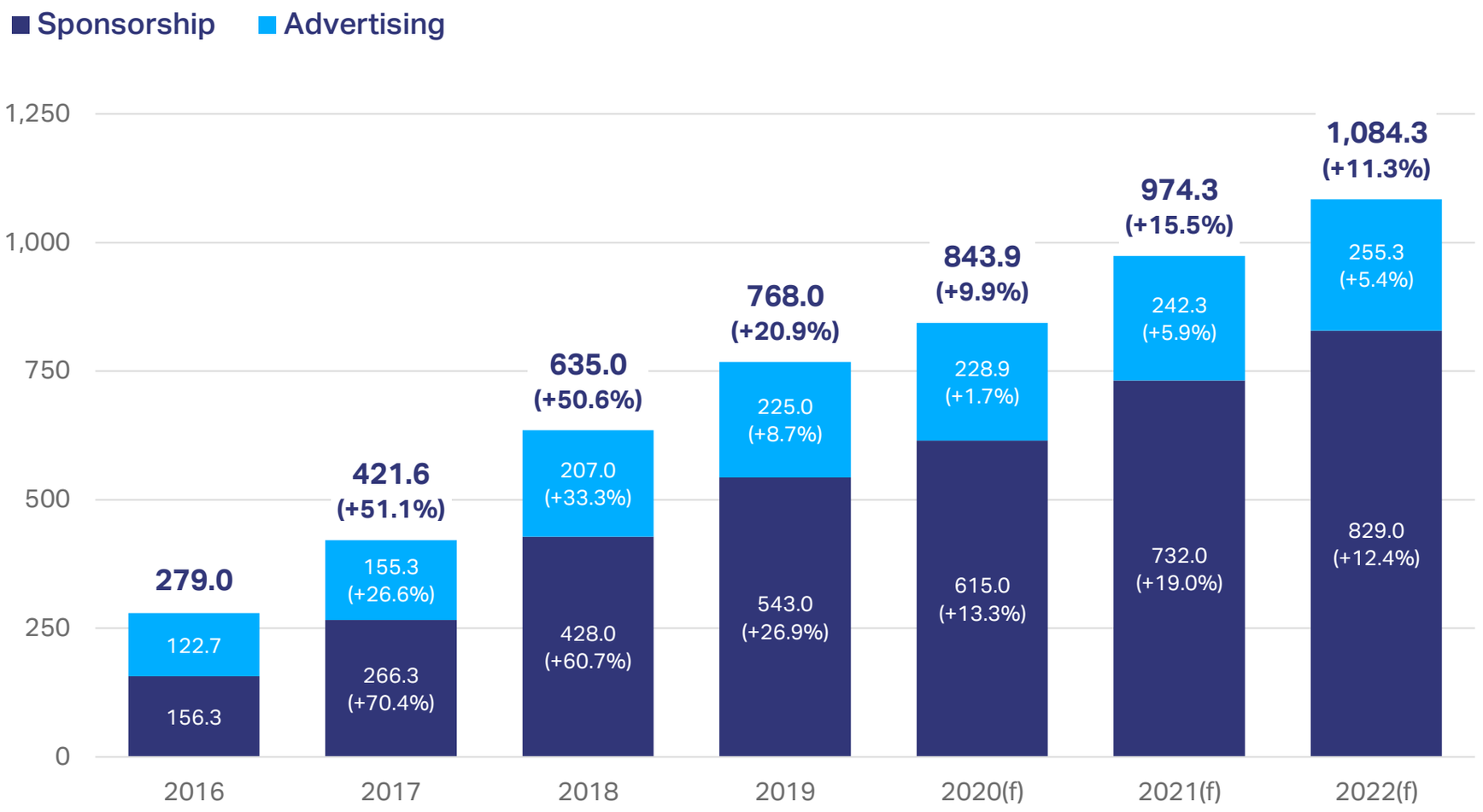
The e-sports ad market is recording perpetual growth

Brand investment is expected to rise in spite of economic turbulence this year, with the vast majority (62.8% in 2020) of money directed towards sponsorships. Over half of investment is made in Asia.

Advertisers looking to work in this space should ensure brand integration feels organic and authentic, and that any messaging does not interfere with gameplay.

Sponsorships can be rewarding, as successful execution can ultimately turn gamers into brand advocates. But brands must also understand individual games and the lexicon around them.

Global, Brand investment in e-sports, US$ millions



Note: Advertising is predominantly spot during breaks in live broadcast.
SOURCE: Newzoo, WARC Data

Global Ad Trends

Media Profiles

WARC DATA

Global outlook

Ad investment set to fall by 8.1% – $50bn – this year

-8.1%
Growth forecast 2020

$563bn
Spend forecast 2020

+4.9%
Growth forecast 2021

-3.5%
US growth forecast 2020

-8.6%
China growth forecast 2020

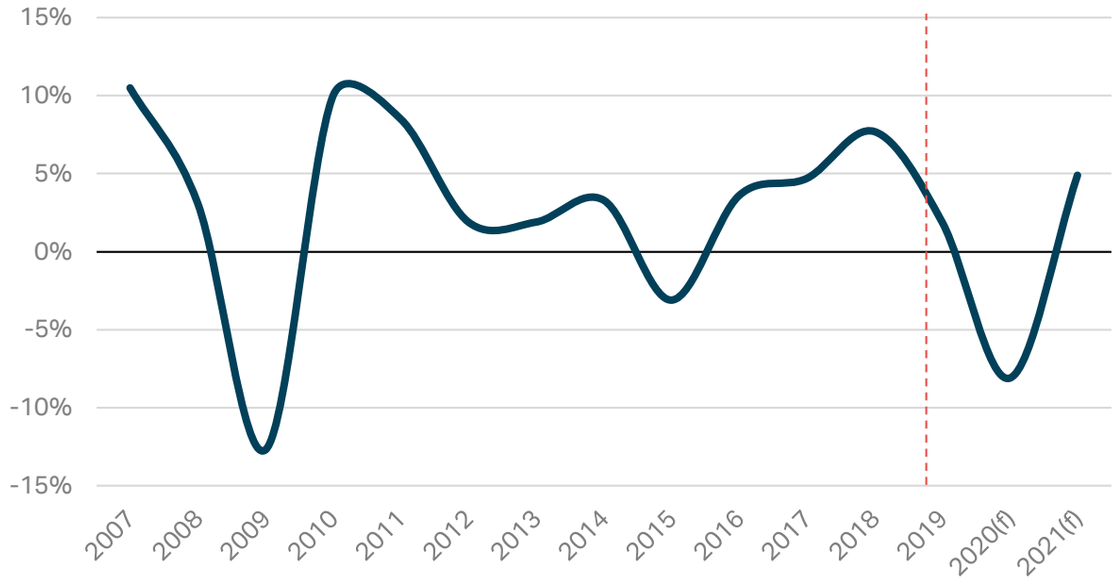
WARC forecasts in May **project global advertising spend** to fall by 8.1% to $563bn this year. This is a decline of $50bn from 2019's level but an absolute downgrade of $96bn when compared to WARC's previous forecast of 7.1% growth made in February.

The sectors most badly affected by COVID-19 are also those cutting adspend the most this year. Travel & tourism will fall by almost a third (31.2%), with leisure & entertainment (-28.7%) and financial services (-18.2%) also markedly down.

Traditional advertising formats are expected to see steep cuts, declining 16.3% this year, with TV down 13.8% and OOH by 21.7%. Social media (+9.8%) is likely to be the strongest performer.

Among key markets, India and the US are expected to perform best while Brazil, Italy and South Africa will see the biggest falls in spend.

Adspend, Year-on-year % change, Current prices



Note: WARC uses variable exchange rates across all markets and periods. Chart is % change in US$ global advertising spend.
SOURCE: WARC Data, *Adspend Database*

Shopee
Number of orders double for third quarter running

430m
Orders Q1 2020

111.2%
Orders growth Q1 2020

43%
Indonesia's share of total orders

$6.2bn
GMV Q1 2020

$314m
E-commerce revenue Q1 2020

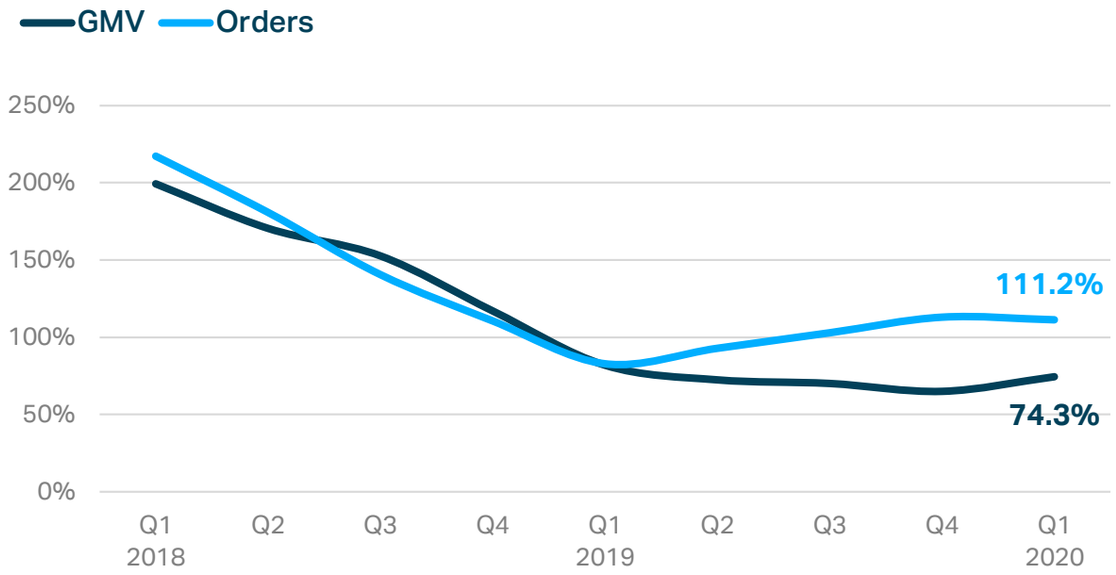
The number of orders placed on e-commerce platform Shopee more than doubled to reach 430m in Q1 2020, with an increase of 111.2% representing the third consecutive quarter of triple-digit growth. The company also reports that orders grew by over 140% in April 2020.

Gross Merchandise Volume (GMV), the value of platform sales, saw growth quicken from 64.8% to 74.3% in Q1 2020, reaching US$6.2bn.

Quicker growth in orders than GMV suggests consumers have shifted to buying lower-priced items more often.

Shopee also reports that over 40% of Indonesian orders in April were paid using its parent company's mobile wallet service, SeaMoney.

Performance, Year-on-year % change



Note: Gross Merchandise Volume (GMV) is value of orders, includes shipping and other charges. Orders can include multiple items and returns.
SOURCE: Sea

Twitter
Record user growth but advertising collapses

-22.7%
Ad revenue growth Q2 2020

$562m
Ad revenue Q2 2020

12.0%
Daily user growth Q2 2020

186m
Daily users Q2 2020

50m
Users using the Topics feature

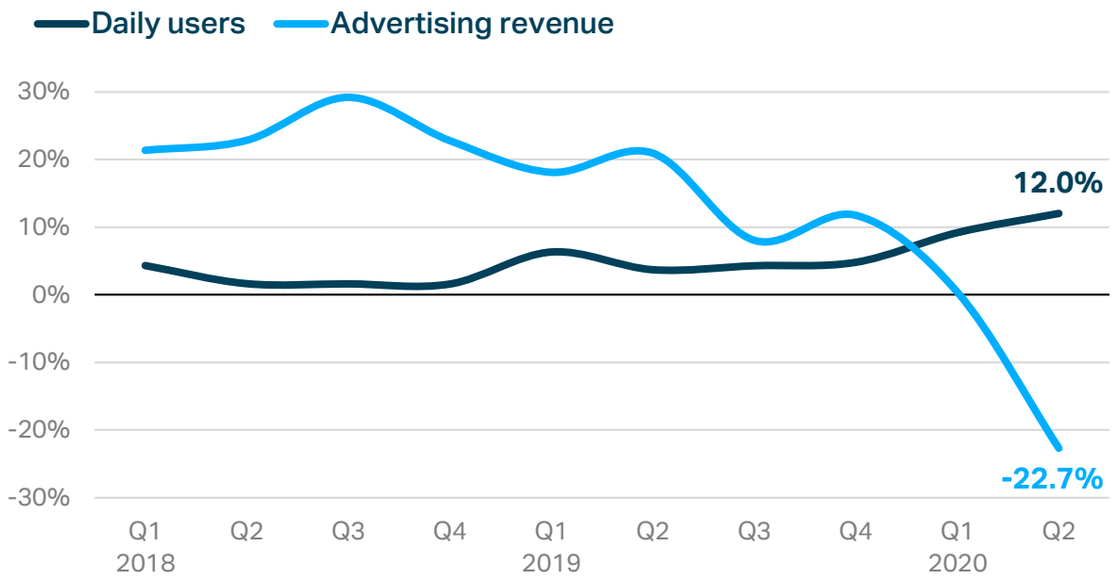
Twitter reported its largest ever increase in daily users in Q2 2020, growing by 12.0% quarter-on-quarter to a total of 186m. Over 50m users also use the new Topics feature, allowing them to follow the trends they're interested in like sports and music.

However, advertising revenue fell to its lowest level in three years – dropping 22.7% year-on-year to $562m. Revenue from the United States fell by a quarter while international markets dropped 20%.

It appears the worst is over, though. In the last three weeks of March, ad revenue fell by 27% but this rate of decline had slowed to 15% in the last three weeks of July.

The company is also branching out into areas like subscriptions and commerce, though this will be "complementary" to advertising.

Performance, % change



Note: % change in daily users is quarter-on-quarter, advertising revenue is year-on-year.
SOURCE: Twitter

Snapchat
Ad revenue grows 17% but user growth to slow

17%
Ad revenue growth Q2 2020

20%
Forecast ad revenue growth Q3 2020

30%
European ad revenue growth

3.9%
Daily user growth Q2 2020

2.1%
Forecast daily user growth Q3 2020

Snapchat saw a relatively healthy increase in advertising revenue, rising 17% to $454m in Q2 2020. While this is the lowest rate of increase ever reported, it was generally ahead of expectations.

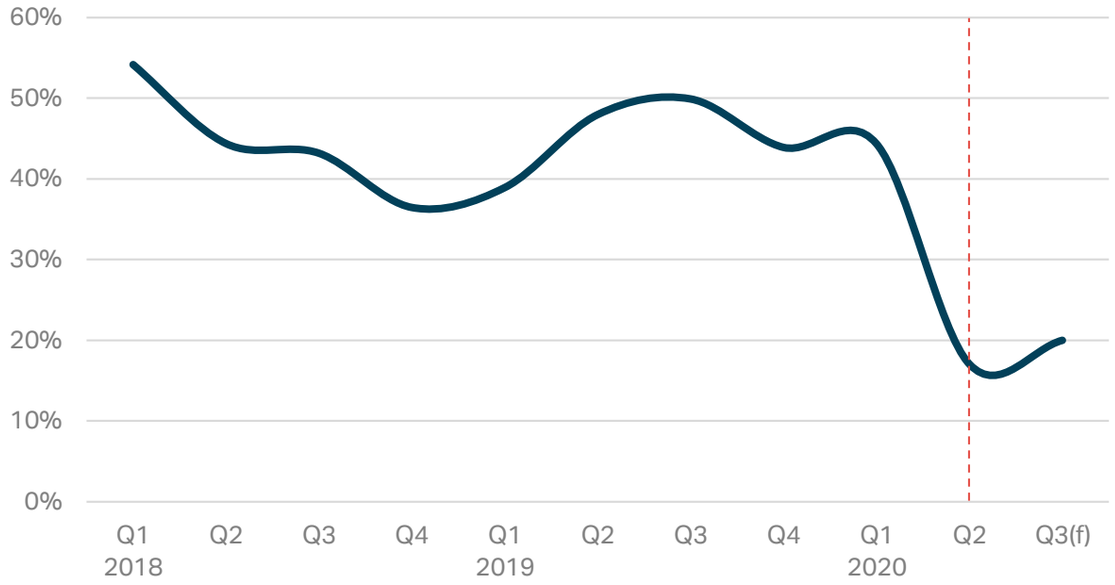
Even with uncertainty around key events like the back to school season, ad revenue growth is forecast to quicken to 20% in Q3 2020.

Europe performed best, with ad revenue rising 30% to $79m. North America rose 18% to $307m while the Rest of World was up just 2%.

Snapchat also added 9m daily users in Q2 2020, up 3.9% to 238m.

However, user growth is to slow to 2.1% in Q3. The company will be hoping to attract and engage users with its new Mini applications features, small third-party apps that run inside Snapchat.

Advertising revenue, Year-on-year % change



Note: % change in daily users is quarter-on-quarter, advertising revenue is year-on-year. Q3 2020 is Snapchat's internal forecast.
SOURCE: Snapchat

The Guardian
Reader contributions resolve falling ad revenue

-2.9%
Ad revenue growth FY19/20

12.0%
Reader revenue growth FY19/20

56%
Digital revenue FY19/20

25%
International revenue FY19/20

£25m
Impact of COVID-19 on revenue

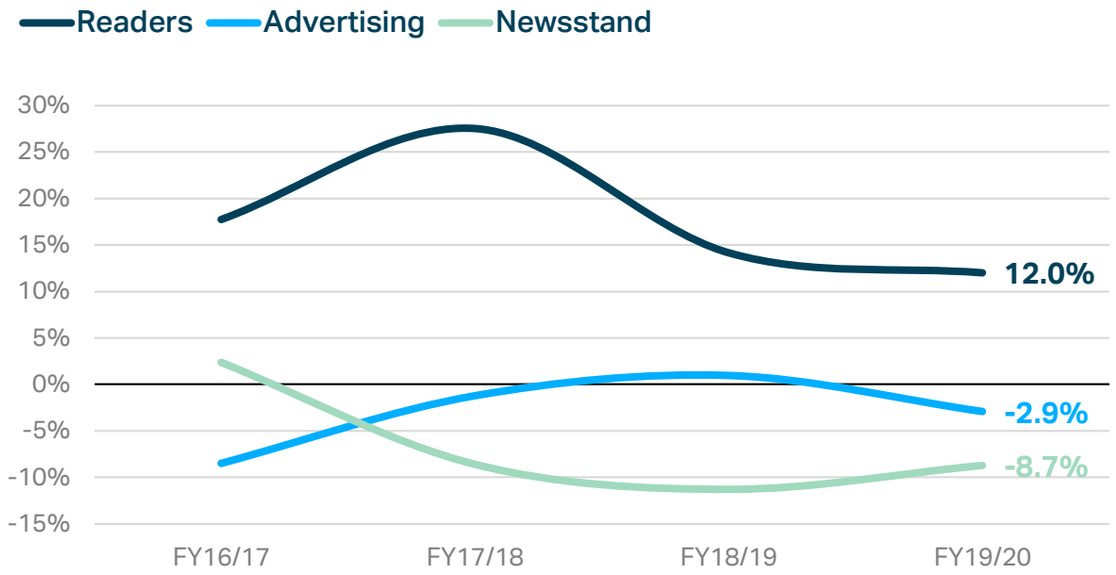
Advertising revenue for The Guardian and The Observer newsbrands fell 2.9% in the 12 months to March 2020, dropping £2.6m to £87.2m. While still the largest segment at 39% of total revenue, this share is down from almost a half (47%) in FY15/16.

Instead, reader contributions, from one-off donations to editorial subscriptions, continues to be the area of growth. The segment has near-doubled since FY15/16 and rose 12.0% in FY19/20, to £80.5m.

Digital formats accounted for 56% of total revenue, up from 39% in FY15/16. The newsbrand also generated a quarter (25%) of its revenue from outside of the UK, the highest level ever.

COVID-19 will knock revenues down by "more than £25m" this year, bringing the total below £200m for the first time since 2013.

Revenue by segment, Year-on-year % change



Note: All data cover The Guardian and The Observer newsbrands for the financial years ending in March.
SOURCE: Guardian Media Group

Netflix
10m more subscribers but growth to slow

5.5%
Subscriber growth Q2 2020

1.3%
Subscriber growth forecast Q3 2020

61.5m
EMEA subscribers Q2 2020

5.1%
LATAM subscriber growth Q2 2020

7.1%
Marketing's share of total revenue Q2 2020

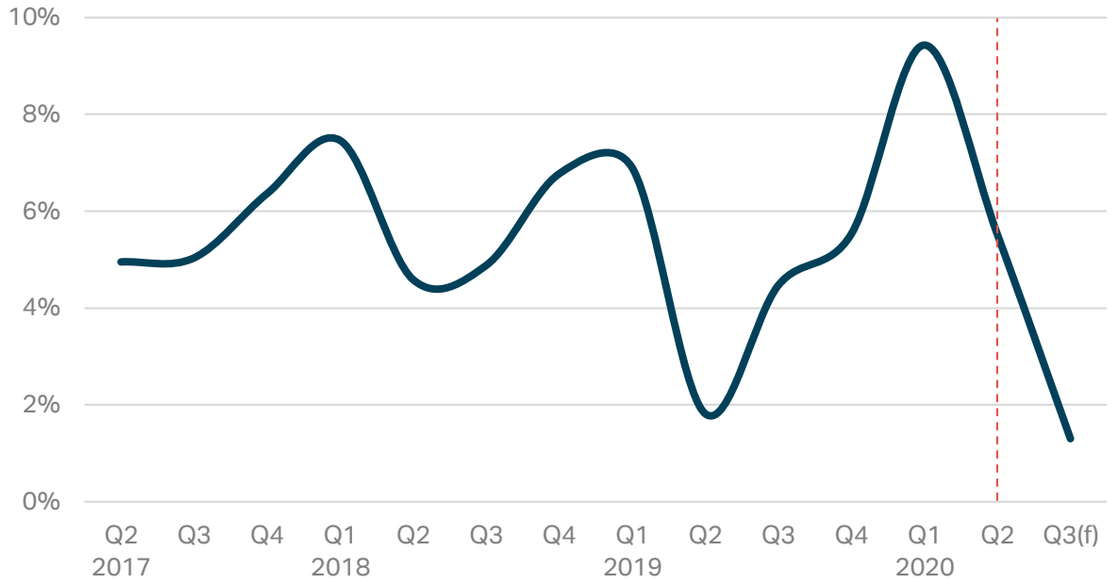
Netflix added 10.1m paid streaming subscriptions in Q2 2020, taking the total to 192.9m. This allowed streaming revenue to top $6bn for the first time ever as a result of higher interest during COVID-19.

However, this subscriber growth of 5.5% is slower than Q1 2020's 9.4%, with almost the entirety of expansion coming in April and May. Netflix forecasts this growth will slow to just 1.3% in Q3, the lowest rate of increase since 2011 and suggesting some level of saturation.

The US and Canada is the largest region, with 72.9m subscribers, while Asia Pacific saw the quickest growth, up 13.4% in Q2 2020.

Netflix has also become less reliant on advertising its platform to attract subscribers, with marketing spend falling to a **three year low**.

Paid subscriptions, Quarter-on-quarter % change



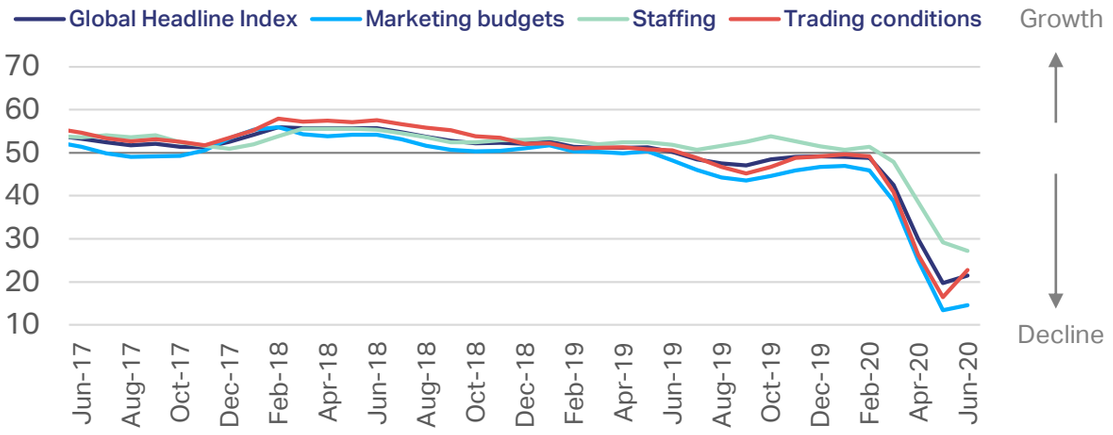
Note: Only includes paid streaming subscriptions, Q3 2020 is Netflix's internal forecast.
SOURCE: Netflix

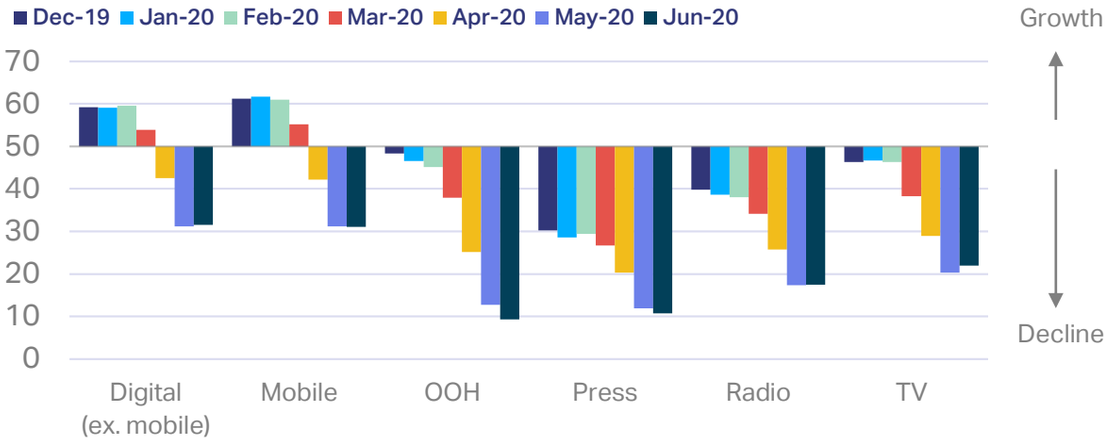
Global Ad Trends

Latest Market Intel

WARC DATA

Global





Note: Value above 50 is growth, below 50 is decline. Larger/smaller values signal severity. Media breakdown is change in marketing budgets.
SOURCE: WARC Data, *Global Marketing Index*

Four in five want brands to act in support of Black Lives Matter
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DTC brands struggled to attract new online shoppers during COVID-19
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Facebook hate speech tops at least 10 million pieces of content
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Half of online shoppers get product inspiration from Amazon
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Global audio advertising spend to fall below $30bn this year
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Roku and Amazon account for two-thirds of connected TV viewing
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Half of shopping apps run retargeting campaigns
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Instagram Stories becoming shorter and less popular
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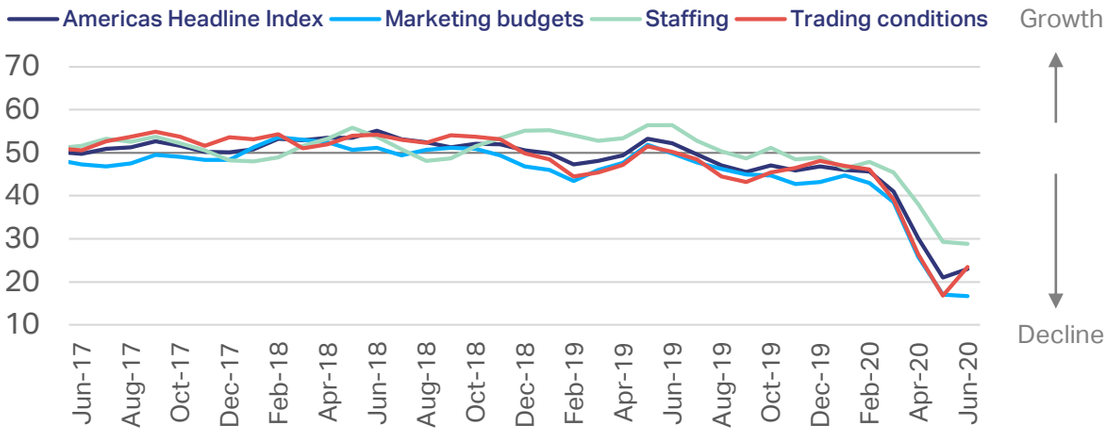
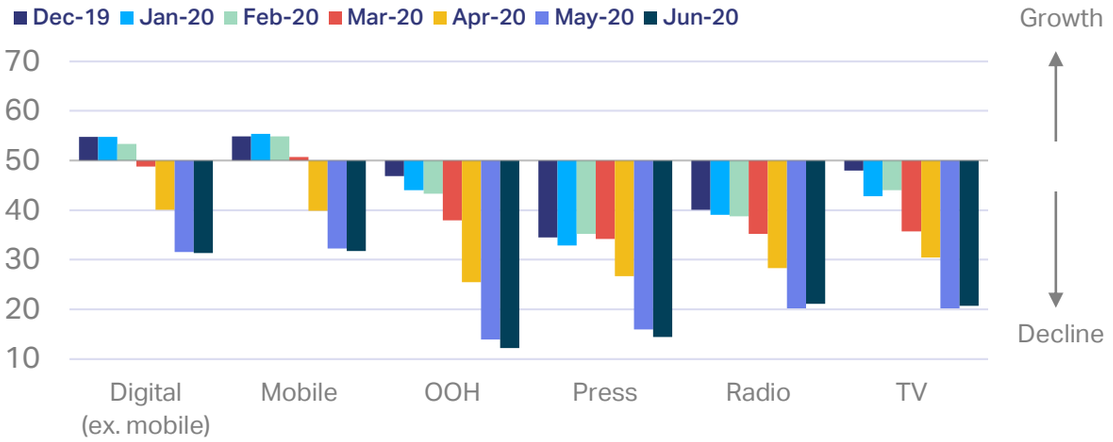
Americas





Note: Value above 50 is growth, below 50 is decline. Larger/smaller values signal severity. Media breakdown is change in marketing budgets.
SOURCE: WARC Data, *Global Marketing Index*

US online grocery sales up 80% since March
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Facebook video grows 49% in Latin America but brands struggle to attract viewers
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Online display to overtake TV as retail's lead media
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Children now spending as much time on TikTok as YouTube
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#StopHateforProfit hitting 1% of Facebook's income
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81% of Brazilians want future products to enhance their health and wellbeing
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Largest US advertisers spent over $140m on Instagram in Q2 2020
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One in four marketers intends to use influencers less after COVID-19
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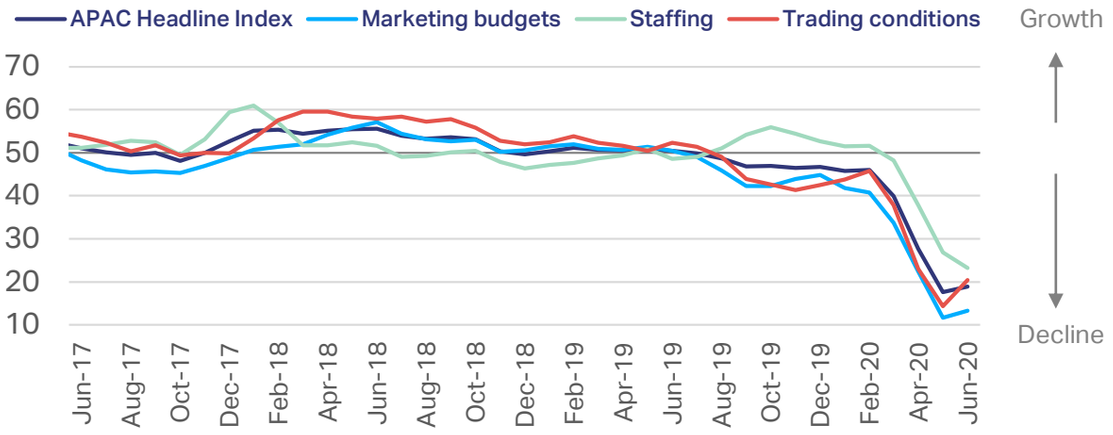
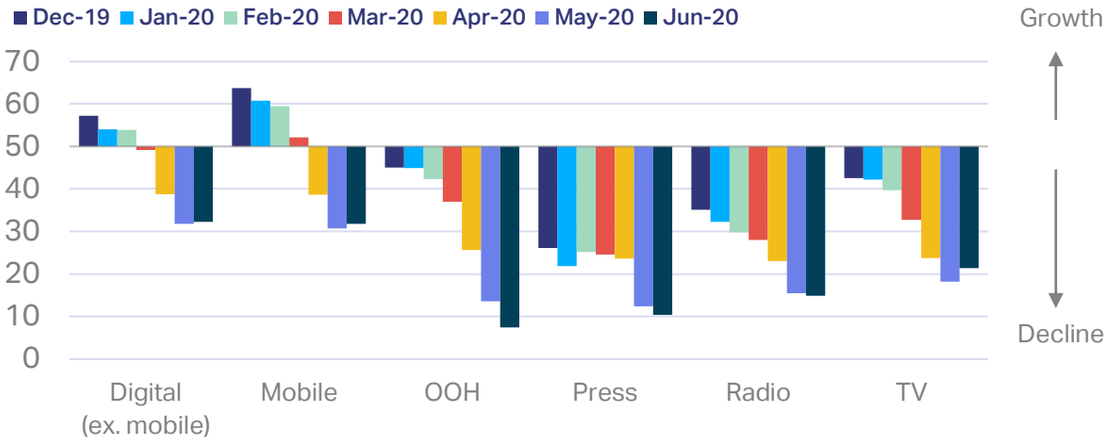
Asia Pacific





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SOURCE: WARC Data, *Global Marketing Index*

Invalid traffic cost Chinese advertisers ¥28bn in 2019
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Australian grocery footfall returns to normal but retail down 16% in June
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Chinese consumers most likely to delay luxury purchases
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Digital channels lead way for Asian effectiveness
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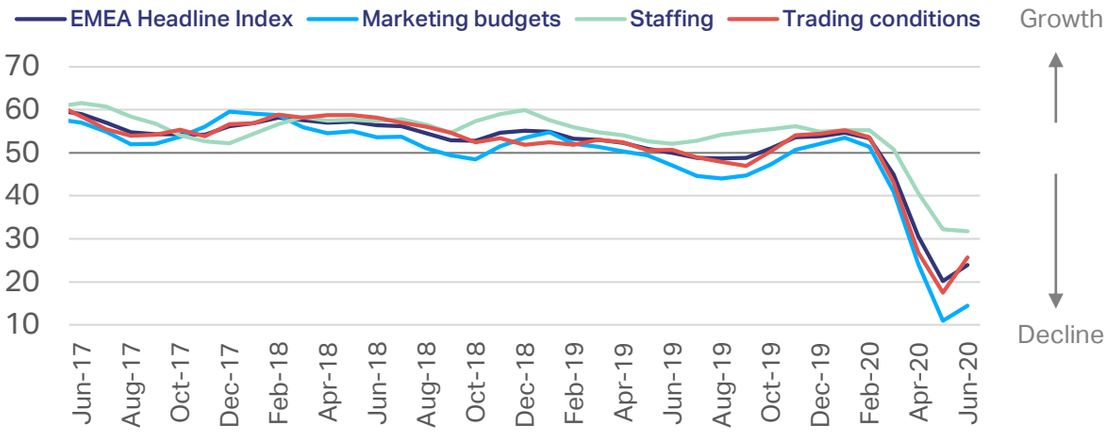
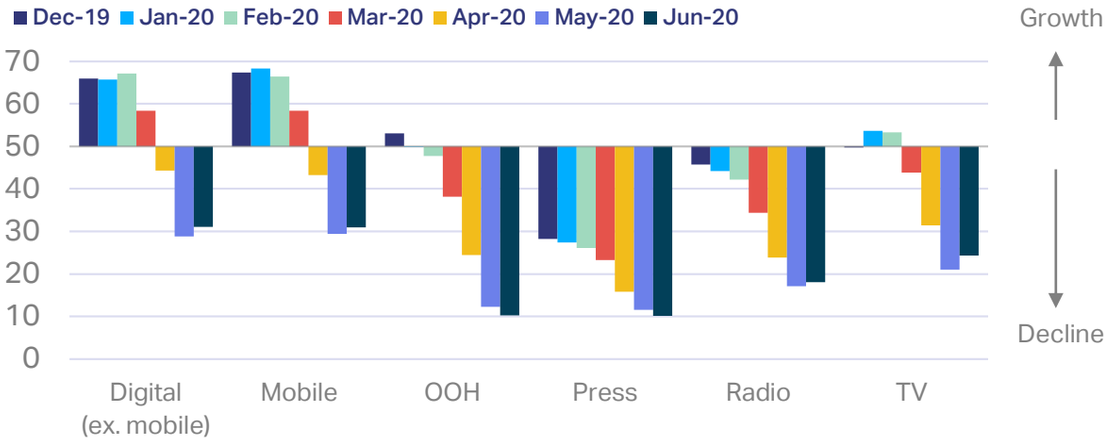
EMEA





Note: Value above 50 is growth, below 50 is decline. Larger/smaller values signal severity. Media breakdown is change in marketing budgets.
SOURCE: WARC Data, *Global Marketing Index*

Top UK retailers to see £5.4bn sales boost as Amazon overtakes Sainsbury's
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COVID-19 drives audiences to pay for online news
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E-commerce platform Zalando is the largest Facebook advertiser in France and Italy
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Children now spending as much time on TikTok as YouTube
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Half of UK SMEs have cut adspend and struggle with campaign effectiveness
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54% of African consumers to continue to buy from online stores discovered during COVID-19
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