

A soccer goalkeeper in a yellow uniform is diving to catch a ball on a green field. The goalkeeper is wearing a yellow long-sleeved shirt, yellow shorts, and yellow socks. He is wearing black gloves and black cleats. The ball is white and is in the air to the left of the goalkeeper. The background shows a green field and a goal net.

# Global Ad Trends: FIFA World Cup 2026

**WARC** | Media

# Executive summary

**The 2026 men's FIFA World Cup will be the biggest in the tournament's history, hosted across Canada, Mexico and the US, and stretched across more matches than any previous cycle.**

Yet, despite large audiences, rising rights fees and expanding sponsorship packages, the World Cup's measurable contribution to ad growth appears to be weakening.

Globally, this year's tournament is forecast to generate less than half the impact of the 2018 World Cup in Russia. Uplift in markets like the UK now resemble timing effects within annual budgets, rather than a dependable engine of net growth.

World Cup advertisers are no longer competing within a single commercial surface.

Brands will engage fans across touchpoints – before, during, and after matches. Debate about the games matters as much as live sporting drama.

Media plans increasingly include platforms that benefit from the conversation about the World Cup without the burden of bidding for rights – from creator content to podcasts.

This Global Ad Trends report examines how the World Cup has become a high-visibility event whose commercial impact is increasingly fragmented, conditional, and redistributive.

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# Takeaways

## 01 Globally, the World Cup's ad impact has been inconsistent

The ad spend uplift from the World Cup has fluctuated since 2014. WARC forecasts the 2026 tournament will inject \$10.5bn into the ad market, reversing a decline from 2022, but lagging the total from 2018.

## 02 It still drives huge audiences, but weaker linear reach

Qatar 2022 reached 2.87 billion people for at least one minute, yet linear reach fell 11.9% versus 2018. Multiplatform consumption rose as digital viewing expanded, particularly in China and India.

## 03 Attention is shifting to the conversation around games

TikTok has become a FIFA partner, and will show behind-the-scenes footage, while platforms such as Netflix are looking to monetise the conversation around the games through video podcasts.

## 04 World Cup windfalls can crowd out regular spenders

Tournaments can boost TV and OOH revenue, but premium pricing may displace regular advertisers. Gains for rights holders may represent spend redistribution rather than expansion of the total.

# Takeaways

## 05 Late night matches provide category opportunities

Many games will take place outside of peak hours in Europe, the Middle East and Asia. This may open up opportunities for brands in restricted categories such as quick-service food delivery.

## 06 The men's competition still leads for broad audience reach

The most-watched match of the 2023 women's World Cup (Spain vs. England) drew 67.6 million live viewers in-home, whereas the 2022 men's World Cup final attracted 570.8 million.

## 07 The World Cup delivers truly global engagement

Viewing intensity for the 2022 competition was highest in markets in Africa, Latin America and the Middle East and North Africa, where engagement levels significantly exceed global averages.

## 08 Interest in the US is growing, but still lags other regions

Average audiences for the 2024 Copa América more than doubled versus 2021, while both the UEFA Women's Euro and the CONCACAF Gold Cup recorded significant year-on-year growth in viewing.



Chapter 1

# FIFA World Cup: Mixed results for ad markets



# 1.

## No guarantee of World Cup ad market boost



The World Cup is a truly global phenomenon, with 48 teams from six continents taking part in 104 matches overall.

According to FIFA's own estimates, the 2026 tournament – taking place in June and July – could contribute \$40.9bn to global GDP, boosting employment in host nations and encouraging international travel. The viewing audience is also expected to be several billion strong.

Against this backdrop, one might expect the World Cup to drive momentum in ad spend growth.

Figures from WARC Media, however, point to a more complex scenario.

To isolate the event's impact on investment, we compared the World Cup quarter's ad spend growth against its underlying trend, using the same quarter in the previous year as a baseline. The difference (or 'uplift') is then expressed as a proportion of total annual ad spend.

Based on WARC Media's latest forecasts, the 2026 World Cup will inject an extra \$10.5bn into the global ad market in the quarter when the event takes place.

This marks an incremental gain of 1.1%, when adjusting for inflation, measured against the average annual growth rates – in real terms – during non-tournament years.

Placing these figures into a longer-term context suggests that the World Cup, held every four years, is not guaranteed to drive gains in ad revenue for media owners.

The Qatar World Cup in November 2022, for example, saw a 4.6% decline in ad spend versus the quarterly norm, although macro conditions and winter timing of the tournament played a role.

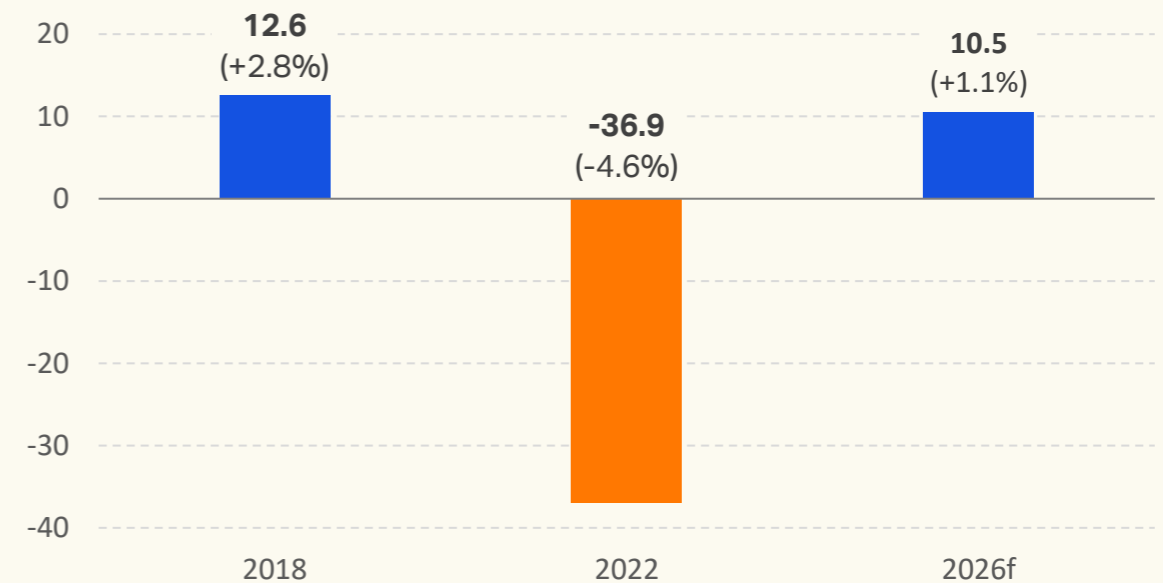
In contrast, the 2018 World Cup, held in the summer months in Russia, injected \$12.6bn into the global ad market, a 2.8% spike on the quarterly average. It should be noted that this trend was supported by a robust global

advertising market in 2018, when investment growth totalled +9.2%.

But the lower incremental growth forecast for 2026 versus 2018 hints at deeper shifts in viewer habits – and related fragmentation in broadcasting patterns and the wider media ecosystem.

## Global, World Cup quarter impact on annual ad spend growth

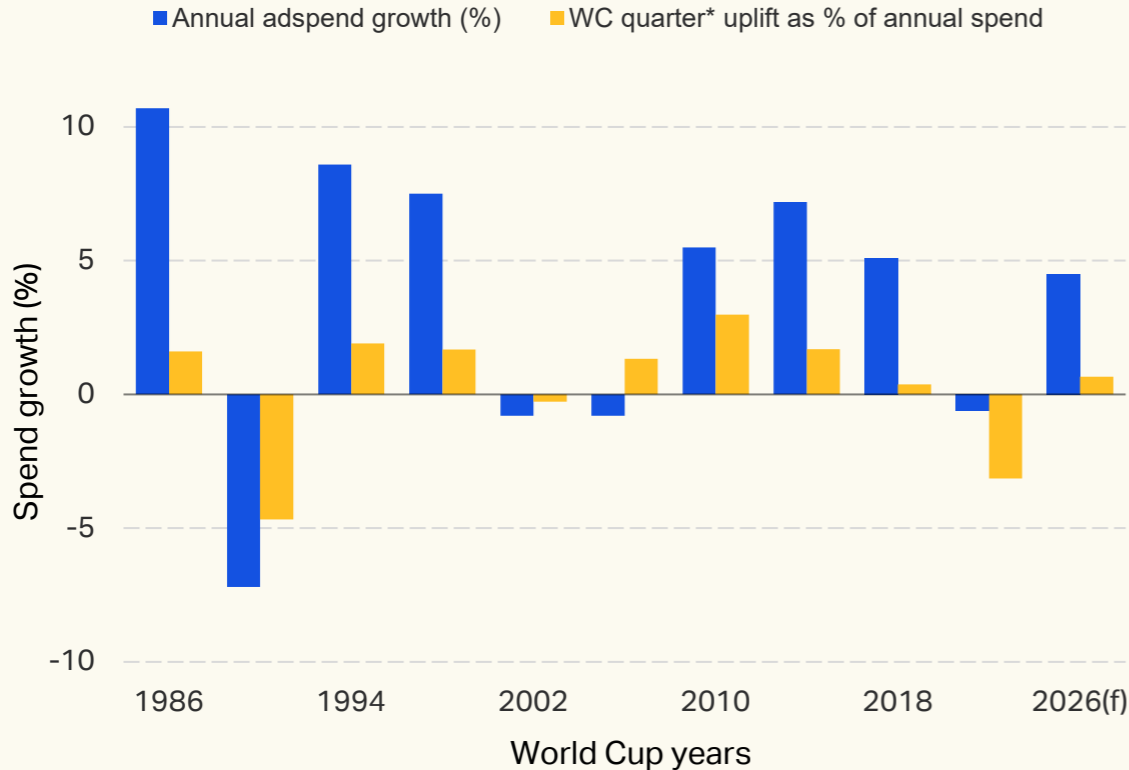
\$, billions, constant currency



**Note:** 2026 data are WARC forecasts. Methodology: for 2018 calculation, Q2 2021 is excluded as COVID-19 outlier. For the 2022 calculation, Q4 2021 was excluded as a COVID-19 outlier.

**Source:** WARC Media

## UK, World Cup quarter impact on annual ad spend growth, 1986-2026(f)



**Note:** 2026 data are WARC forecasts. \*All are Q2 apart from Qatar 2022 (held in Q4)

**Source:** WARC Media

## UK: An increasingly weak boost

From the mid-1990s to 2014, the UK ad spend uplift during the World Cup quarter was consistently significant, averaging at 1.7%-1.9% above trend. In 2010, the effect peaked at nearly 3% of total ad spend.

After 2014, the pattern shifts. In 2018, despite annual growth nearing 5%, uplift fell to 0.38% of annual spend – materially below historical norms. In Qatar 2022, the break was sharper: the World Cup quarter underperformed its baseline (-3.1%).

For Luke Stillman, managing director at the Madison & Wall

consultancy, the 2014 pivot is no coincidence: “That’s the time in which digital went from being this tiny part of the piece to swapping with TV for the most important part of budgets.”

Forecasts for 2026 point to a modest rebound, with uplift projected at around 0.66% of annual spend in a 4.5% growth year – well below pre-2014 levels.

This suggests the World Cup still produces quarter-level spikes in the UK, but they are diminished by a larger, more diversified advertising economy.

## The US: Scale dilutes impact

In the US – where football competes with popular domestic sports – the World Cup’s effect on ad investment is modest and inconsistent.

The World Cup is commercially visible in the US, but rarely decisive at aggregate level, and there is no sustained period in which the tournament reliably concentrated annual growth.

The tournament quarter has helped to deliver incremental uplift in several cycles, including 1986, 1994, 1998, 2010 and 2018. But even at its strongest – just under 1.5% of annual ad spend in

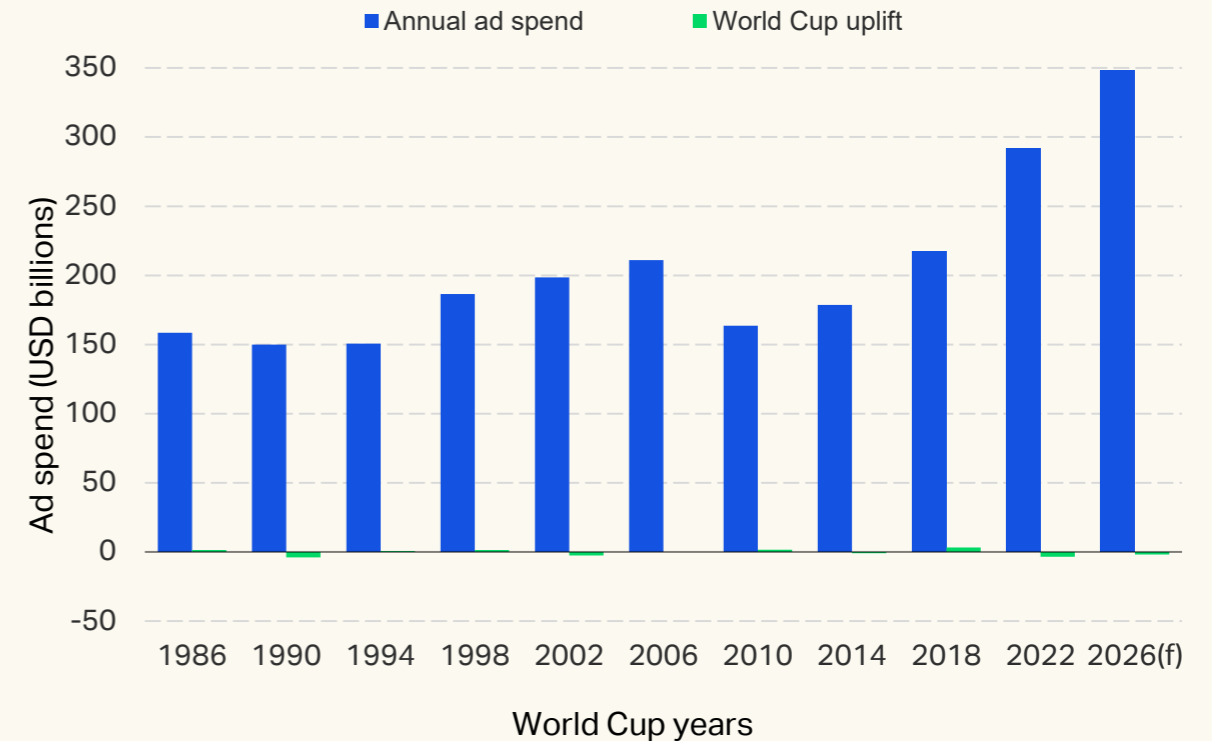
2018, when the US men’s team failed to qualify – the uplift remains below the UK’s historical 1.5–3% range.

In most positive years, the impact has been closer to 0.4–1%.

This reflects scale: in an advertising economy approaching \$300bn and spanning multiple mature media channels, even a global tentpole struggles to shift the overall trajectory.

As Stillman notes: “In the US, the World Cup is \$400m-\$500m out of a \$60bn-\$70bn TV ecosystem.”

## US, World Cup quarter impact on annual ad spend growth, 1986-2026(f)



**Note:** Spend amounts are constant prices. WC uplift = estimated additional spend in Q2 of a WC year, relative to adjacent non-WC years (apart from Qatar 2022 which happened in Q4).

**Source:** WARC Media

## Qatar 2022 World Cup linear TV viewing

Region	FWC Qatar 2022	FWC Russia 2018	% difference
Africa & Middle East	550.0m	537.0m	▲ 2.4%
Asia	1,226.8m	1,415.7m	▼ 13.3%
Europe	497.5m	661.3m	▼ 24.8%
N. C. America & Caribbean	267.2m	277.2m	▼ 3.6%
Oceania	13.0m	14.8m	▼ 12.5%
South America	318.6m	355.9m	▼ 10.5%
GLOBAL TOTAL	2,873.0m	3,261.9m	▼ 11.9%

**Note:** FIFA World Cup Qatar 2022 data does not include Russia or Belarus.

**Source:** FIFA

## Vast total audiences, but declining linear reach

A decline in the World Cup's direct commercial impact is certainly not driven by shrinking audiences.

FIFA's audited audience report states that Qatar 2022 set new records for digital engagement. An estimated 2.87 billion people watched at least one minute of linear coverage, with 2.21 billion viewing 20 minutes or more.

While drawing huge audience numbers, linear audiences were significantly smaller than in 2018: one-minute reach fell 11.9%, though the 2022 data excluded Russia and Belarus, which four

years earlier accounted for a combined 120 million viewers.

The shift is structural: linear viewing declined while multiplatform consumption rose. The largest drops were in China (-82 million) and India (-87 million), reflecting rapid digital growth.

Globally, the World Cup is cross-platform but regional behaviours diverge – broadcast-led in Europe versus hybrid-digital in younger and emerging markets. And disaggregated attention is harder to monetise as concentrated market uplift.

# 2.

## Why World Cup ‘windfalls’ are harder to see



A 'World Cup windfall' can materially affect a quarter without necessarily redefining the year.

Even in years where global ad spend growth appears strong, part of that strength reflects cyclical inputs rather than a permanent reacceleration of demand.

To understand what major events like the FIFA men's World Cup reveal about the TV ecosystem – rather than what they simply add to it – we need to look beyond topline growth and examine how consumption itself is evolving.

One reason the World Cup's reputation as a growth engine persists is that headline market

growth figures often include cyclical boosts by design.

WARC's director of data, intelligence and forecasting, James McDonald, frames 2026 as an overall strong year for the global ad market: 9.1% growth, with total investment rising to \$1.3trn. But he immediately clarifies that this figure includes cyclical drivers.

"We include political spend and sporting spend for the Olympics and football as well. That causes a cyclical effect in the growth rates in our data", McDonald says.

## Broadcaster inventory: A ‘crowding-out’ challenge

TV and OOH will be the biggest media beneficiaries from the World Cup, according to WPP Media’s chief business intelligence officer, Kate Scott-Dawkins. But such uplifts do not automatically show up in the data as total market expansion.

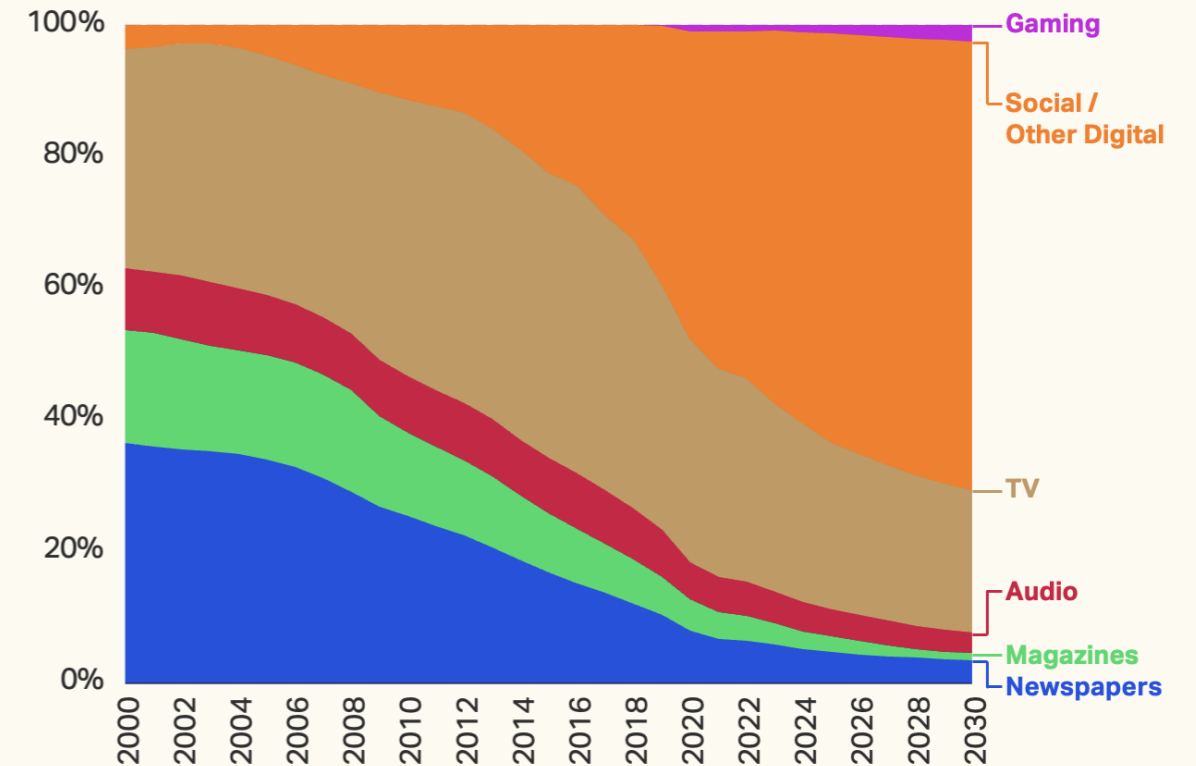
Scott-Dawkins stresses that influxes of spend around major sporting events are like cyclical spending around US elections. Premium pricing during tournament months can crowd out advertisers who deprioritise the event. That creates redistribution

within the year, not necessarily expansion of the total.

She told the WARC Podcast: “When you strip out political [spend], some of those channels can look worse off. In local TV where they are ingesting a lot of those political ads, and you get [advertisers] crowded out.”

WPP Media, which notably excludes political ad spend but not non-recurring sport events, estimates 7.1% global investment growth this year (down from 9.5% for 2025).

## Content-driven ad spend share by channel



Source: WPP Media 'This Year Next Year'

## Winners and losers within the TV market, rather than broad gains

The majority of the World Cup revenue windfall is taken in June, as brands latch on to the anticipation that builds ahead of the tournament.

Kush Bhardwaj, head of investment at Publicis Groupe media agency Zenith UK, estimates ITV – which shares UK TV rights with the BBC – will see a 50% revenue increase in June, and a lower 20% uplift in July. That’s significant against a structurally declining TV baseline.

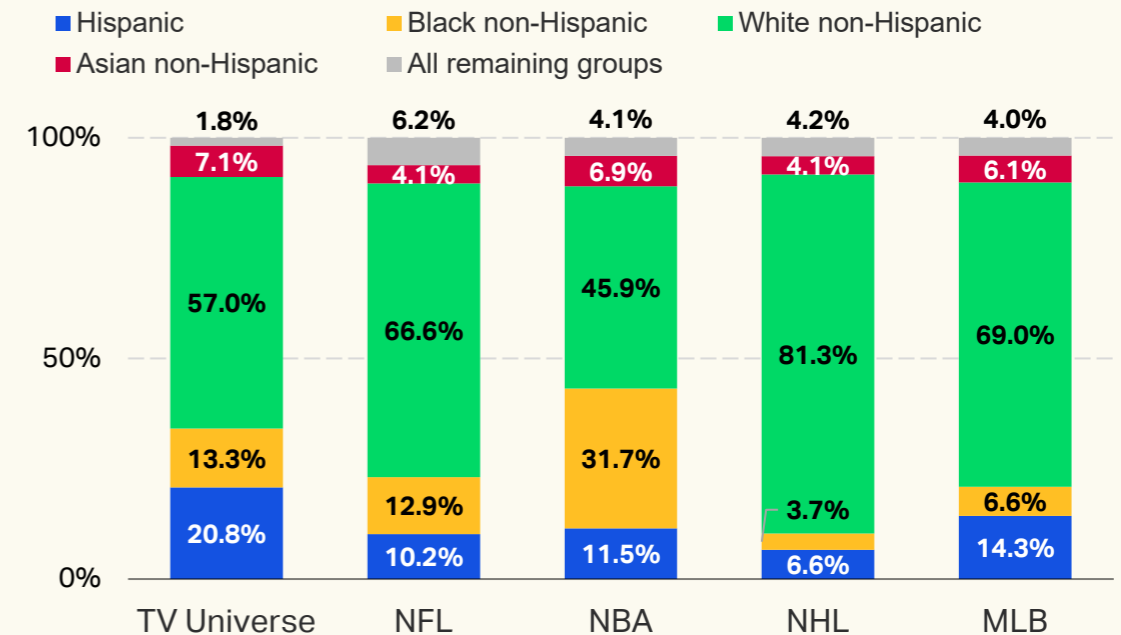
However, even if 2026 delivers a positive full-year TV result, it doesn’t necessarily represent reacceleration.

Stillman explains: “If you’re a network and you happen to have the World Cup rights, it can absolutely be an incremental driver for you that year. But that just means some other TV broadcaster is losing out.”

In host markets, additional activation and experiential investment may create localised commercial spikes. For example, [Nielsen’s 2025 data](#) shows baseball’s postseason playoff expanding its Hispanic and Asian audience. These shifts suggest that brands should build media plans to capitalise on audience diversity, rather than broad CPM assumptions.

## Sport can drive interest with diverse audiences – like the MLB Postseason with Hispanic and Asian viewers

Audience composition, postseason for major sports



Source: Nielsen

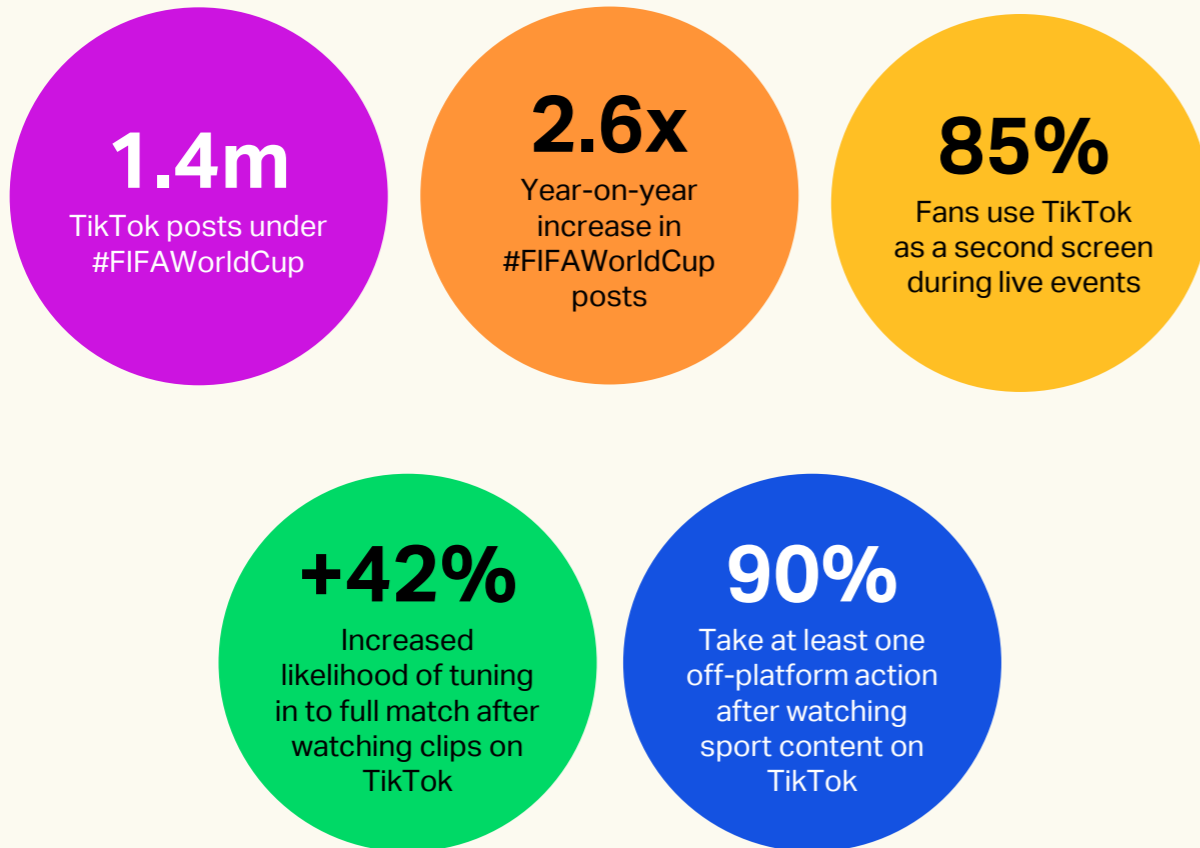


**Dan Holt**

Strategy Partner  
Havas Media Network

**“The [World Cup] match will be the base layer. Meaning will be assembled elsewhere, across social feeds, watch-alongs, creator commentary, group chats, memes and remixes.”**

## Key stats: TikTok's football audience



Source: TikTok, Ipsos

## How attention spills beyond rights holders

The dispersal effect now extends beyond competing broadcasters into the wider content ecosystem. Such investment tends to sit outside conventional event uplift metrics.

In January 2026, FIFA signed a "Preferred Platform" agreement with TikTok, granting creators behind-the-scenes access and archive rights. Previous cycles sought to contain content within official broadcast environments, but this deal formalises a parallel distribution layer.

Another beneficiary is premium video podcasts. Goalhanger's The Rest Is Football has more than 450,000 YouTube subscribers, and most consumption occurs on video. Tournament cycles magnify this: during Euro 2024, the show generated 19.6 million full-episode YouTube views in one month.

In late 2025, Netflix agreed a reported £14m deal to stream the podcast daily during the 2026 World Cup. Instead of holding match rights, Netflix is buying the surrounding conversation.

## Brands still (selectively) ring-fence World Cup budgets

Martin Blich, WPP Media executive director and head of US sports investment and partnerships, insists that dedicated World Cup budgets remain real.

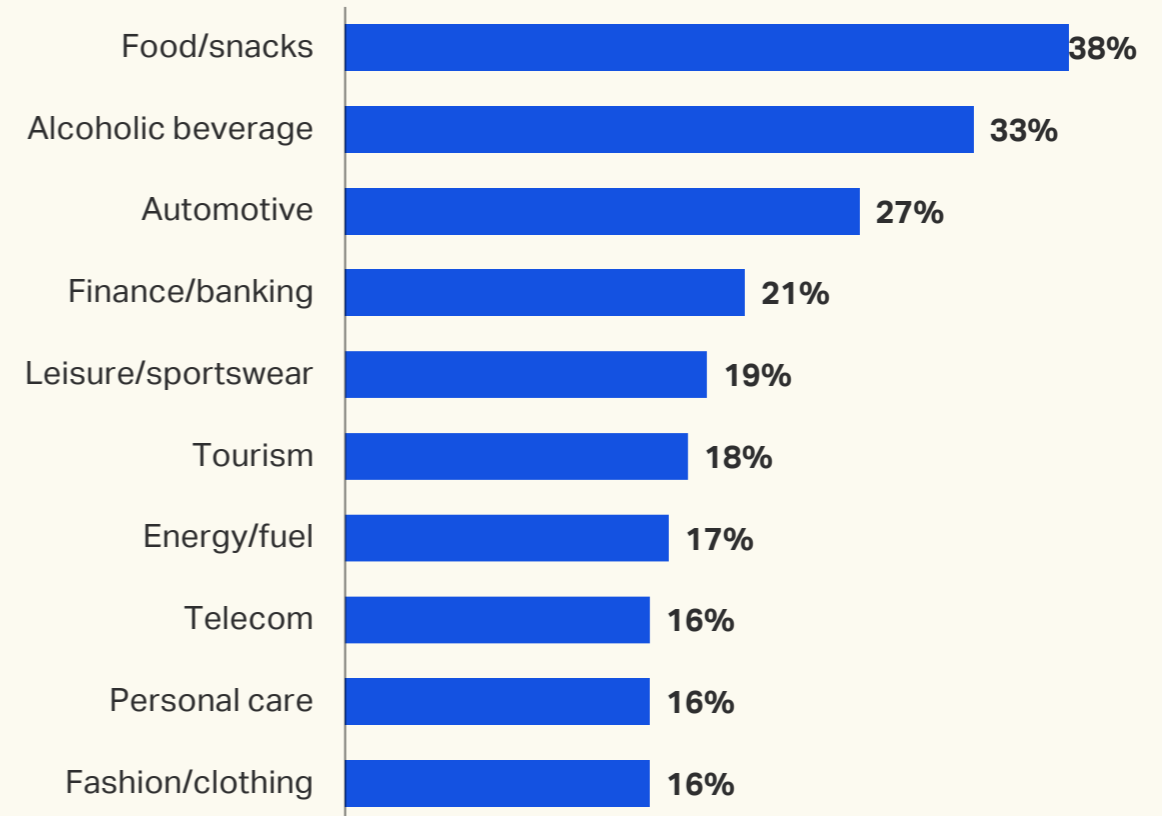
“Brands are committing meaningful spend across the tournament. It remains a distinct, planned investment rather than something pulled together reactively”, Blich says.

However, ring-fencing does not necessarily mean net incrementality.

Bhardwaj describes two client buying strategies around the World Cup: some brands lean into the inflationary June-July window to exploit high reach, shared viewing and “overhead” non-football audiences; others shift spend to avoid price spikes.

Key sectors such as sportswear, automotive, finance, alcohol and food delivery are typically more active, with late-night fixtures creating contextual opportunities for at-home consumption brands (quick-service delivery).

## Brand recall at the Qatar 2022 World Cup



Source: Nielsen

# 3.

## What it means for World Cup advertisers



The World Cup may no longer drive large sums of incremental ad spend. But, planned correctly, the tournament can concentrate audience reach in a window of genuine cultural relevance.

The question is whether advertisers are paying for it intelligently. Madison & Wall's Stillman is direct: "The budget, on the whole, is driven by the business performance, not by what happens to be the advertising opportunities throughout the year."

And it follows that not all advertisers should lean in.

Zenith UK's Bhardwaj describes two distinct strategies: ring-fence and

commit, or plan around the period entirely to "mitigate inflation".

Both are valid while being clear that the World Cup should be seen as a choice rather than as a default advertising opportunity.

Where genuine incrementality exists, it is at a category level. Bhardwaj adds: "If you're a beer brand and the World Cup suddenly disappears, you would definitely be reconsidering your marketing investment for the year."

But that logic applies to a narrow set of categories, not the market as a whole.

# Category opportunities beckon from late-night kick-off times

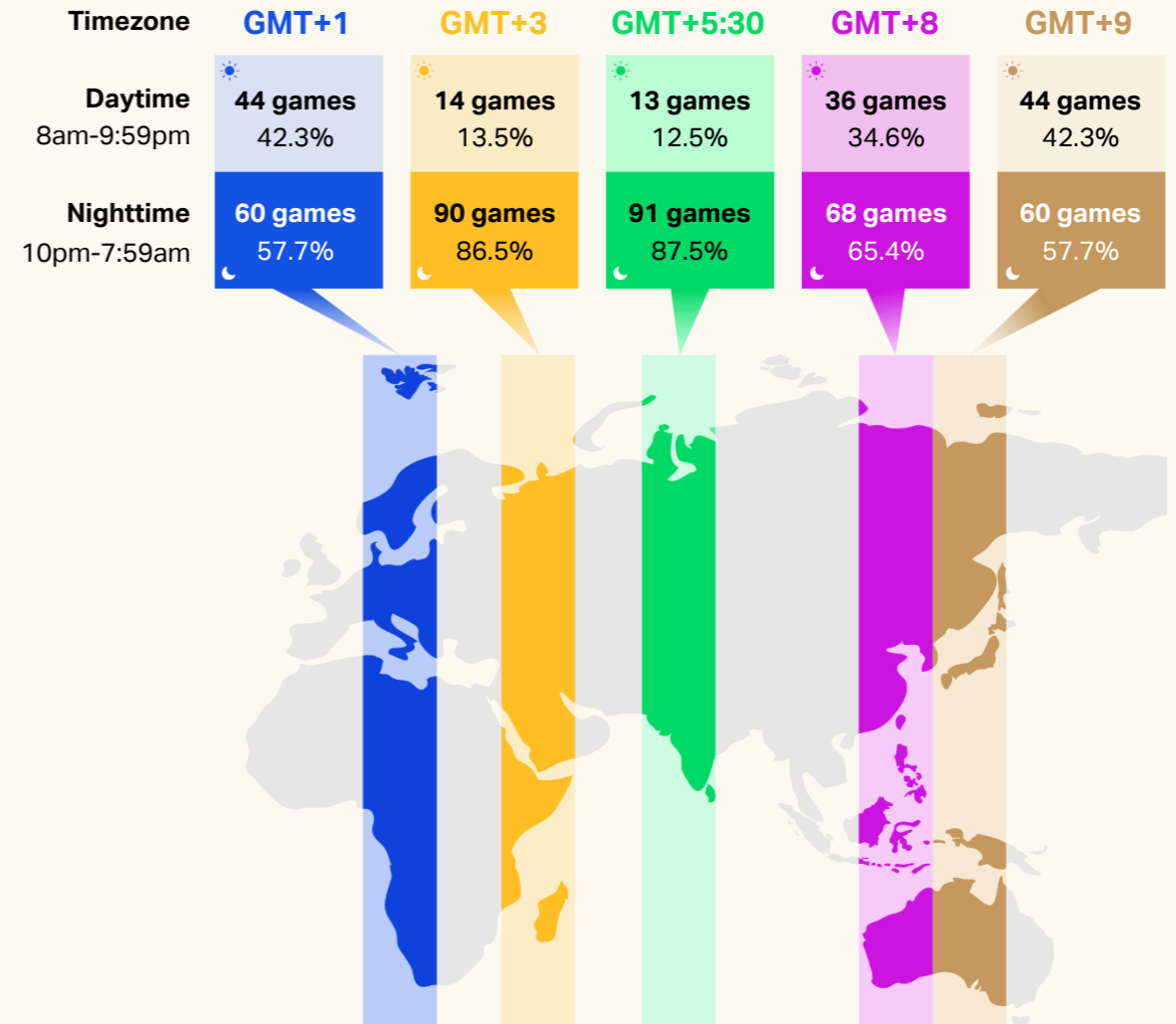
More inventory doesn't always mean better inventory, when many of the games being broadcast from North America will be outside of peak viewing hours in Europe, the Middle East and Asia.

In Western Europe (GMT+1), less than half (42.3%) of games will take place in daytime hours. In China (GMT+8), that percentage drops to just over a third (34.6%).

While this risks limiting opportunities around live broadcast and streaming advertising, it may yield new ones for

non-rights holders, such as podcast, social, and publishing, which curate World Cup content with highlights and commentary.

The late-night schedule may also offer unexpected upsides. "Because a lot of the matches are post-9pm", says Bhardwaj, "this would be an opportunity for those advertisers to have more coverage around the World Cup". This is especially true for brands in restricted categories, such as quick-service food delivery in the UK, where high fat sugar and salt ads are now subject to a watershed.



## Creator and non-rights content: Broadcast is the base layer

For a large chunk of the World Cup audience, watching a match live is no longer *the* experience – it is a base layer.

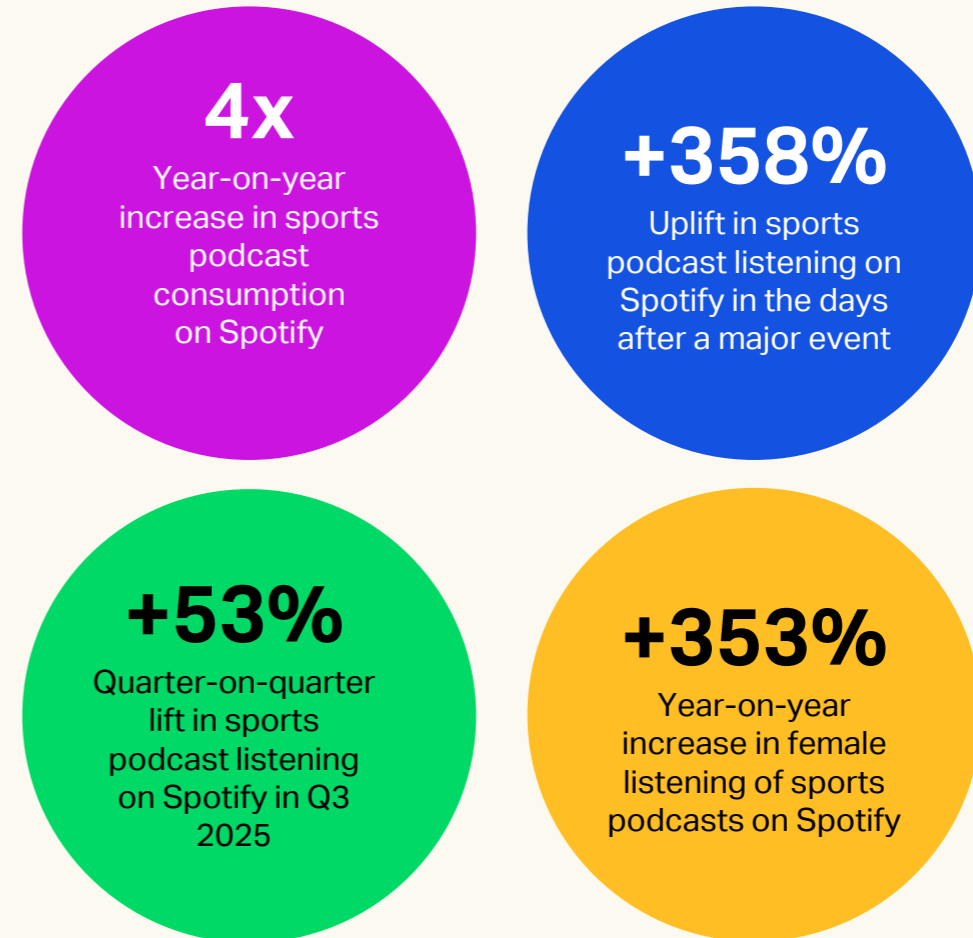
The World Cup is increasingly consumed elsewhere: watch-alongs, creator commentary, group chats, memes. A media plan that ends at the broadcast boundary is incomplete.

In practice, this means brands are increasingly prioritising long-form creator partnerships on platforms

like YouTube and Instagram for dwell time and loyalty; podcast integrations with the likes of Goalhanger for host-read trust; and activity on TikTok for official behind-the-scenes access.

And, by building their ability to create reactive content, brands can respond to tournament moments without rights clearance, thereby capturing organic reach that may outperform paid placements in the same window.

## Spotify: Sports podcast consumption



Source: Spotify, The Podcasting

## The rights premium – and what it means for everyone else

Global sports media rights spend is forecast to peak at \$66.6bn this year before easing to \$63bn in 2027 – the 2026 spike reflecting the combined weight of the World Cup and other major sport cycles.

Football alone claims over a third of total rights spend, but that cost is rising faster than it can be monetised by media owners.

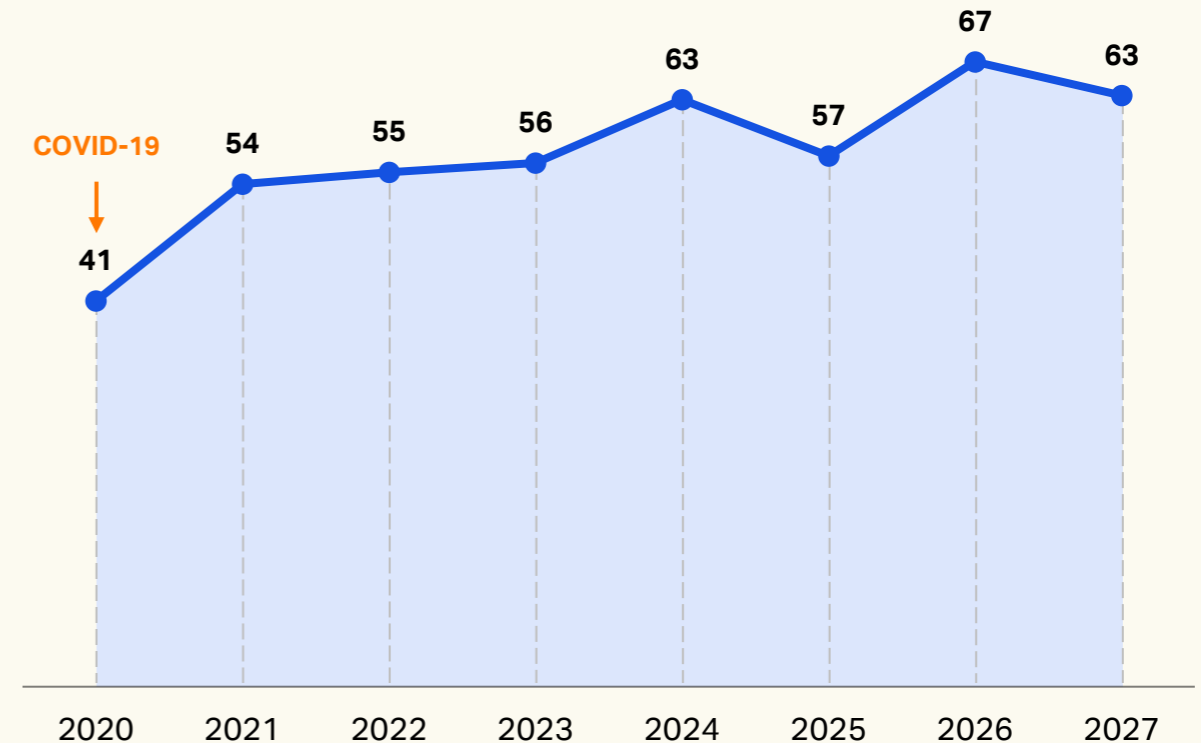
As Stillman puts it: "Sports rights costs are growing two or three times faster than the ad revenue associated with them."

Category exclusivity remains valuable, but the efficiency of rights ownership is declining.

That is the context in which non-rights routes – creator content, podcast integrations, social activations – have moved from second-tier alternatives to primary strategy for a growing number of brands.

## Global value of media rights 2020-2027

\$, billions



Source: SportBusiness Global Media Report 2024

Chapter 2

# FIFA World Cup in numbers



# Mexico and Canada: Home advantage?

Mexico provides a useful stress test on the evolving impact of the FIFA men’s World Cup on ad market growth.

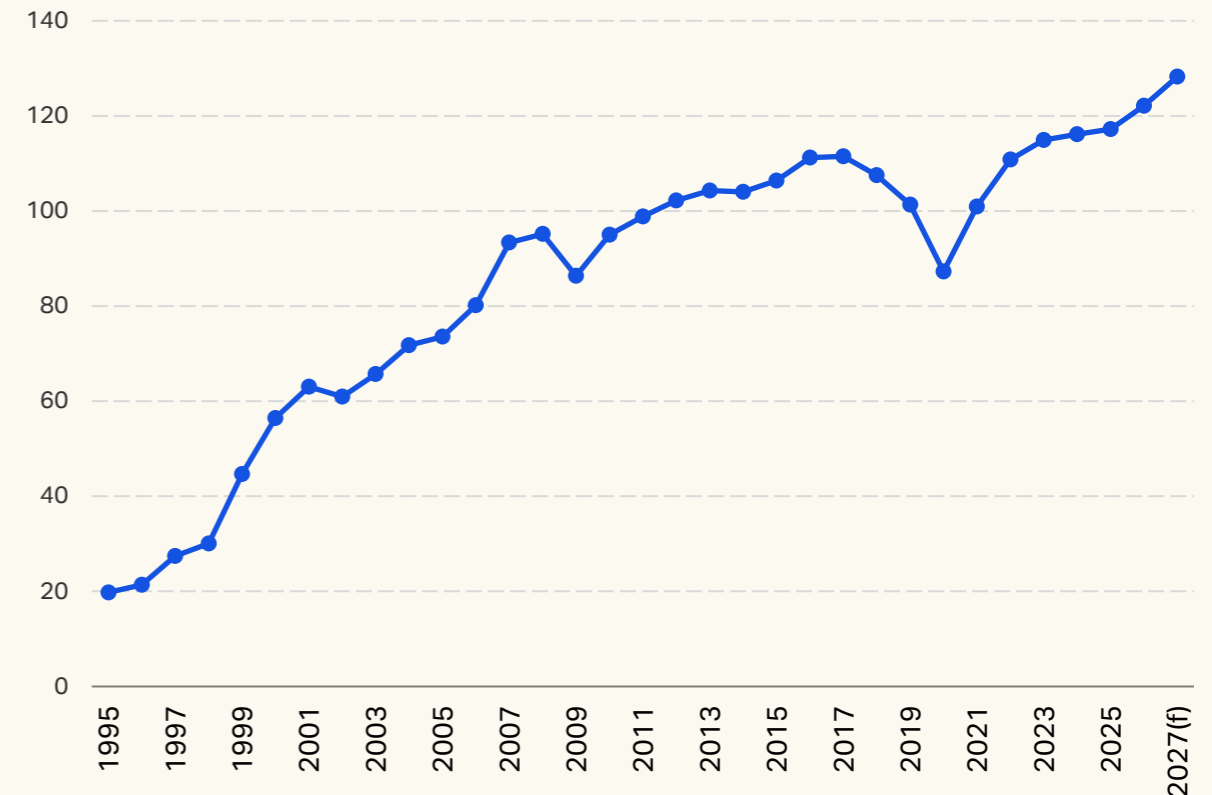
While quarterly data is unavailable, annual ad spend shows no consistent pattern of acceleration in World Cup years. Growth was strong in 2006, 2010 and 2022, but negative in 2002 and 2018, and flat in 2014. The 2026 forecast (c.+4%) is positive but not exceptional for a host market.

A similar pattern is visible in Canada. Annual ad spend growth in World Cup years has historically been inconsistent, tracking broader economic cycles more closely than tournament cycles. Host status alone does not appear to generate structural acceleration at market level.

In other words, even in a football-centric economy, tournament years do not reliably outperform surrounding periods.

## Mexico, Total advertising investment

MXN, billions; constant currency



Source: WARC Media

# Top five most-watched matches

## Men’s World Cup 2022 and Women’s World Cup 2023

The global audience gap between the men’s and women’s World Cups remains substantial.

The most-watched match of the 2023 Women’s World Cup (the final between Spain and England) drew 67.6 million live viewers (in-home), whereas the 2022 men’s World Cup final attracted 570.8 million.

However, the women’s tournament still achieved strong reach at knockout stage level, with four matches exceeding 32 million viewers globally.

The data underlines both the reach advantage of the men’s competition and the growing commercial credibility of the women’s game.

Men’s matches			
Rank	Match	Stage	Global Live Audience (Millions)
1	Argentina vs. France	Final	570.8
2	France vs. Morocco	Semi-Final	325.5
3	Argentina vs. Croatia	Semi-Final	309.1
4	Morocco vs. Portugal	Quarter-Final	291.4
5	Croatia vs. Brazil	Quarter-Final	275.2

Source: FIFA, Publicis Sport & Entertainment, Nielsen

Women’s matches			
Rank	Match	Stage	Global Live Audience (Millions)
1	Spain vs. England	Final	67.6
2	Australia vs. England	Semi-Final	35.7
3	England vs. Colombia	Quarter-Final	34.7
4	Australia vs. France	Quarter-Final	32.3
5	France vs. Brazil	Group F	32.1

Note: Figures refer to in-home viewing only.

Source: FIFA, Publicis Sport & Entertainment, Nielsen

# Global audience engagement at 2022 World Cup

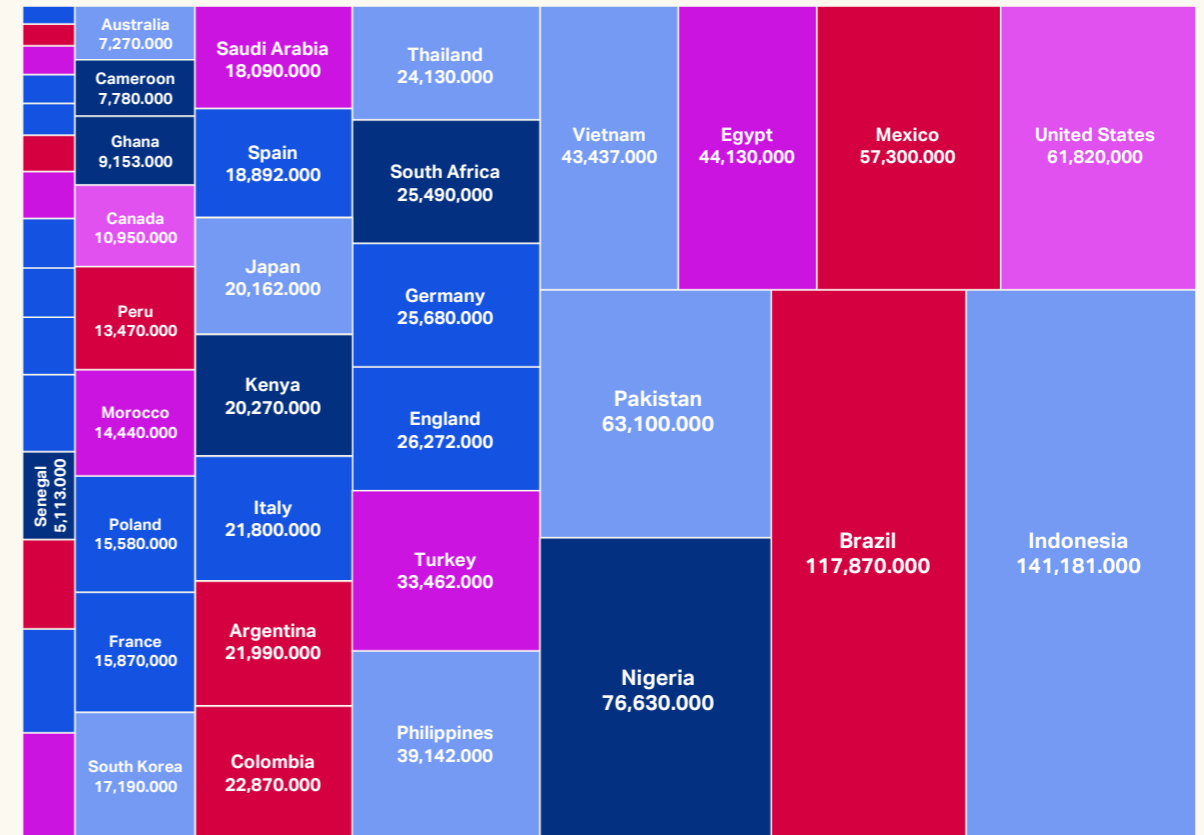
The World Cup’s appeal is rooted in mass participation and shared cultural engagement – whether through players on the pitch, spectators in stadiums, or audiences watching remotely.

Viewing levels are highest in Africa, Latin America and the Middle East and North Africa, where engagement levels significantly exceed global

averages. In Europe, sizeable tournament audiences are concentrated primarily in the UK and Germany.

FIFA has increasingly prioritised expansion in developing markets, recognising that these regions account for a substantial share of global population growth and represent long-term audience and commercial upside.

## Estimated adult audience engaged with Qatar World Cup 2022



Source: TGM Global World Cup Survey

# Sponsorship lags digital channels in intent to invest

WARC's annual Voice of the Marketer survey data shows a net 14% of global marketers surveyed expect to increase sports sponsorship investment in 2026: positive, but modest.

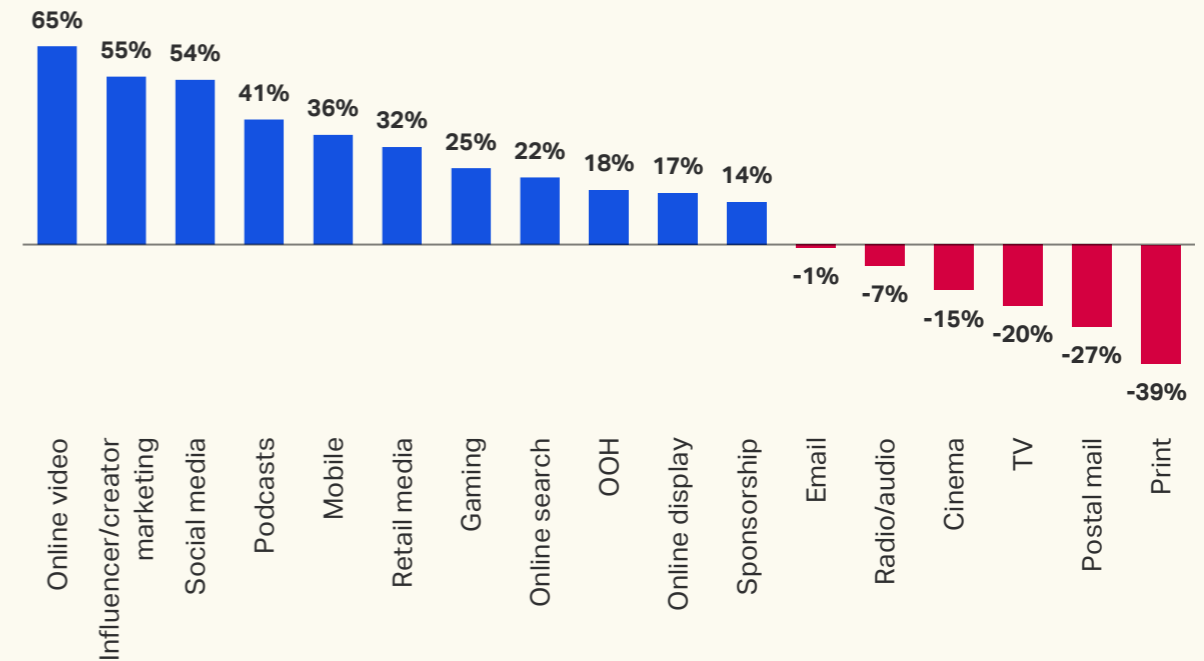
By contrast, online video commands the strongest conviction, with a net 65% expecting budget growth – the highest score recorded.

At the other end of the spectrum, print registers a net -39%, the steepest anticipated decline.

The direction of travel is clear: marketers remain selectively bullish on sport, but digital video continues to absorb the industry's strongest growth expectations while traditional print faces structural retreat.

## Q: How do you expect investment in media channels to change next year?

Net Sentiment\*



**Note:** \*Net Sentiment equals the percentage of respondents that expect investment to increase minus the percentage of respondents who expect investment to decrease.

**Source:** WARC, Voice of the Marketer 2026

# Documentaries create a new avenue for engagement

One of the sharpest examples of cross-platform consumption is sports documentaries on streaming.

Nielsen’s Tops of Sports 2026 report shows that total viewing minutes for sports documentaries on streaming platforms grew substantially – a trend that parallels broader second-screen and extended attention behaviours.

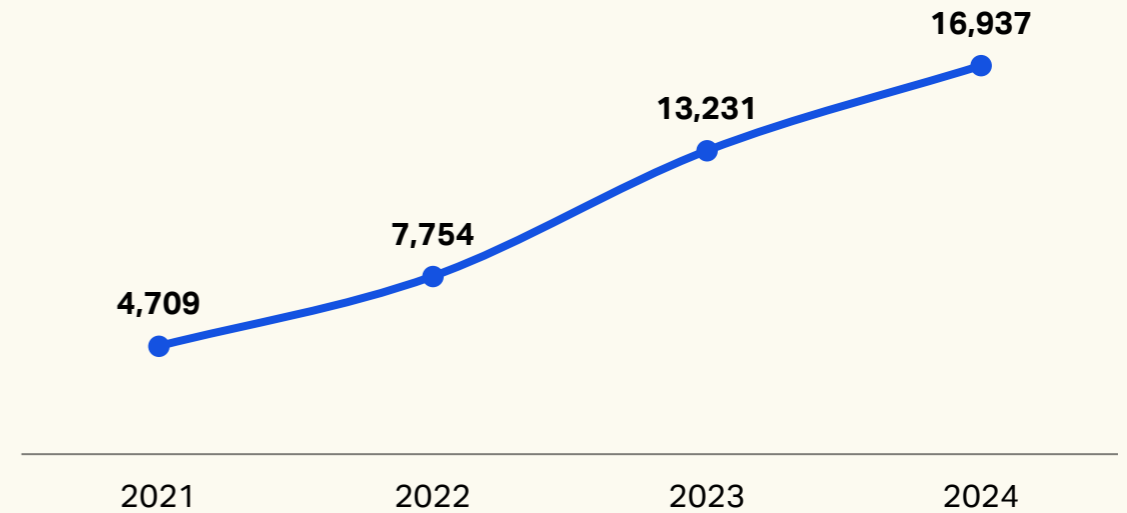
TV engagement isn’t just about event

broadcasting anymore: extended attention ecosystems now hinge on content that bridges live and on-demand.

Streaming sports documentaries have emerged as a powerful retention engine – minutes streamed for these titles exploded year-on-year – illustrating how major event interest ripples beyond the live window and strengthens brand visibility in the long tail.

## Growing slate of streaming sports docs give fans new ways to engage

Total viewing minutes (in millions) sports documentaries



Source: [Nielsen](#)

# US viewing of international football has been growing

Football remains the world’s most popular sport, with 51% of global respondents identifying as fans.

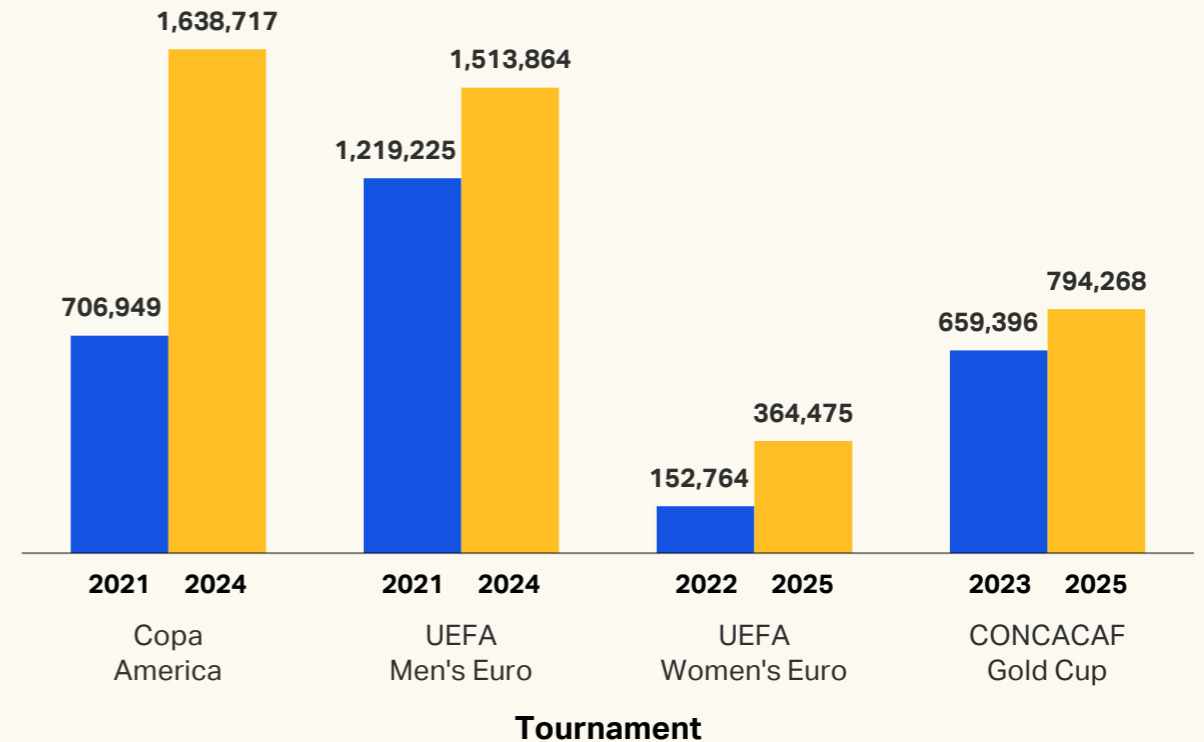
In the US, that figure is lower at 27%. However, interest in international tournaments is rising.

Average audiences for the 2024 Copa América more than doubled versus 2021, while both the UEFA Women’s Euros and the

CONCACAF Gold Cup recorded significant year-on-year growth.

The expanded FIFA Club World Cup 2025, alongside US-hosted Gold Cup fixtures, has further elevated visibility. Notably, 37% of Americans expect their interest in football to increase over the next 18 months, supporting positive momentum ahead of the 2026 World Cup.

## US, International football tournaments average total viewers



Source: [Nielsen](#)

# World Cup TV coverage hours in Asia in decline

The UK has broadcast every FIFA men’s World Cup match live for several decades, with public service broadcasters BBC and ITV sharing rights. However, distribution models vary significantly across the world.

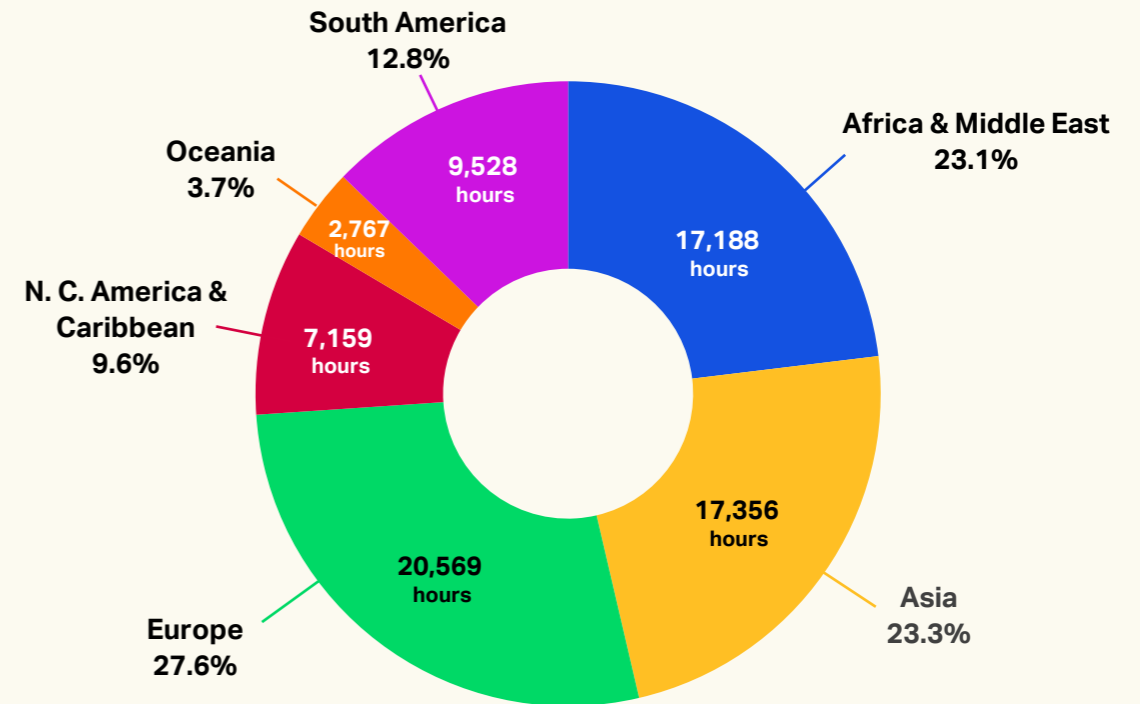
Europe accounted for 27.6% of total coverage hours, with 60% delivered via free-to-air (FTA) broadcasters – the highest regional FTA share. Africa and the

Middle East represented 23.1% of coverage, with 77% on pay-TV, primarily SuperSport in sub-Saharan Africa and beIN Sports in the Middle East.

Asia accounted for 23.3% of global coverage, and South America 12.8%. Overall, TV coverage hours declined 17.5% versus 2018, reflecting broadcaster changes and growing digital distribution.

## Qatar 2022 World Cup TV coverage hours

% share of 74,567 hours



Source: FIFA, Publicis Sport & Entertainment, Nielsen

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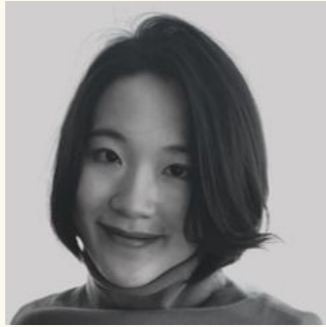
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- [↗](#) Orange: Women's football
- [↗](#) Magyar Telekom: Thousands of Champions



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Forecasting, WARC



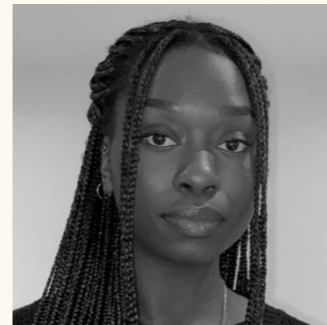
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