

2021 OUTLOOK



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Today's Speakers



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Vice President
Media Innovations + Technology



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Senior Director
Media Innovations + Technology

WHAT WE'LL COVER TODAY

- + 2020 Reflections
- + 2021 Outlook: [Accelerate](#)
 - + All in on Advanced TV
 - + Amped up on Audio
 - + Social Maturity
 - + Finding Identity
- + Takeaways + Q&A

2020 WAS...

VERY VIRTUAL



30x

GROWTH IN VIDEO CONFERENCING

ZOOM USAGE
(MAUs, millions)

10

300

2019

2020

Source: Census Bureau





From WFH to LFH

93%

**OF SCHOOL-AGE CHILDREN
ENGAGED IN E-LEARNING**

The background is a vibrant, surreal digital landscape. In the upper left, a colorful roller coaster track winds through the sky. In the foreground, the back of a person wearing a dark hoodie is visible. To the right, a large, muscular digital avatar of a man with tattoos and a necklace stands in a grassy field. The sky is a mix of purple and blue with many small white stars.

LIMITED SPORTS LED TO A (RE)DISCOVERY OTHER FORMS OF ENTERTAINMENT

**ONLINE GAMING
E-SPORTS
VIRTUAL CONCERTS**

12.3mm

A promotional image for a home entertainment offer. It features the character Mando'ndine in his iconic silver Mandalorian armor, holding a blaster, standing in a snowy, desolate landscape. Beside him is Grogu, the small green alien. In the background, a large, rusted metal structure, possibly a ship's hull, is visible. The text is overlaid on the left side of the image.

**HOME ENTERTAINMENT
HIT NEW LEVELS**

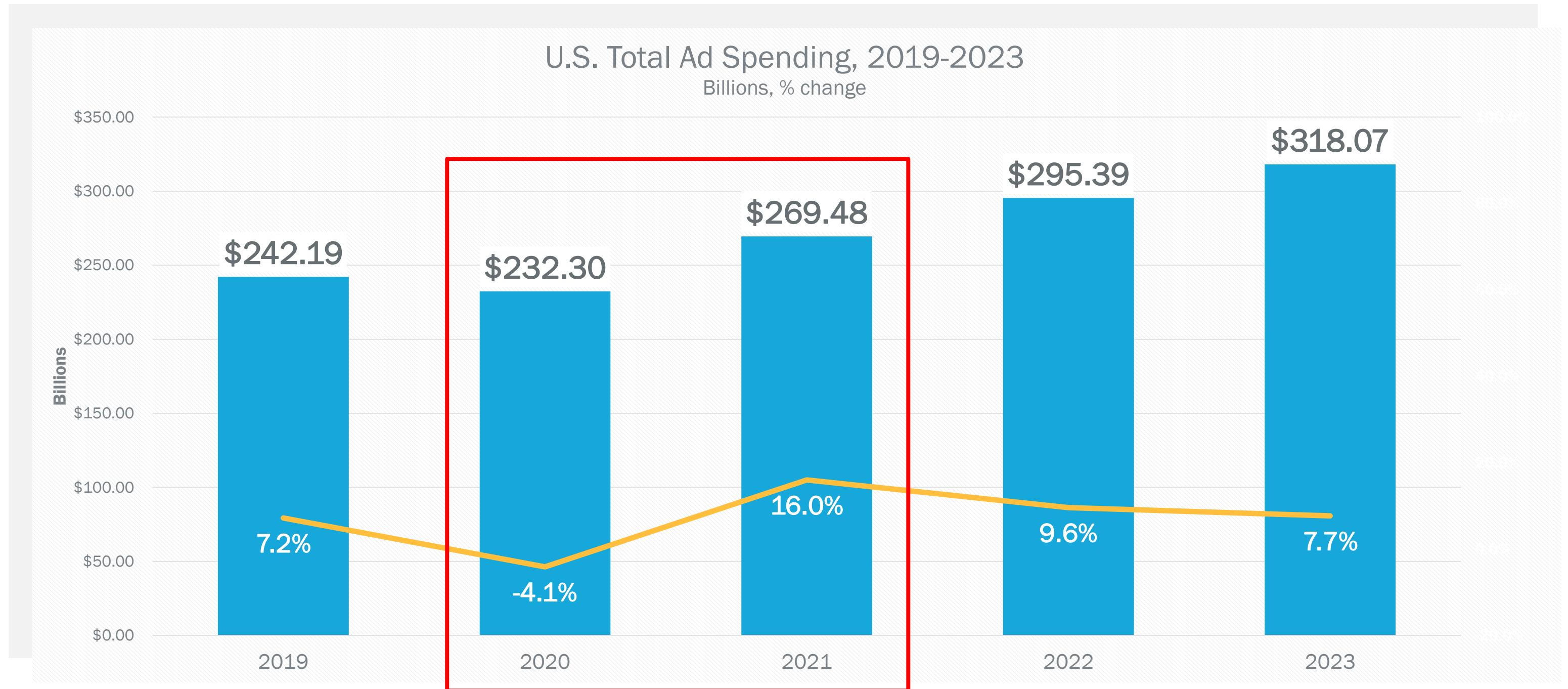
20%

**STREAMING DIGITAL VIDEO
+ OVER 2 HOURS DAILY**

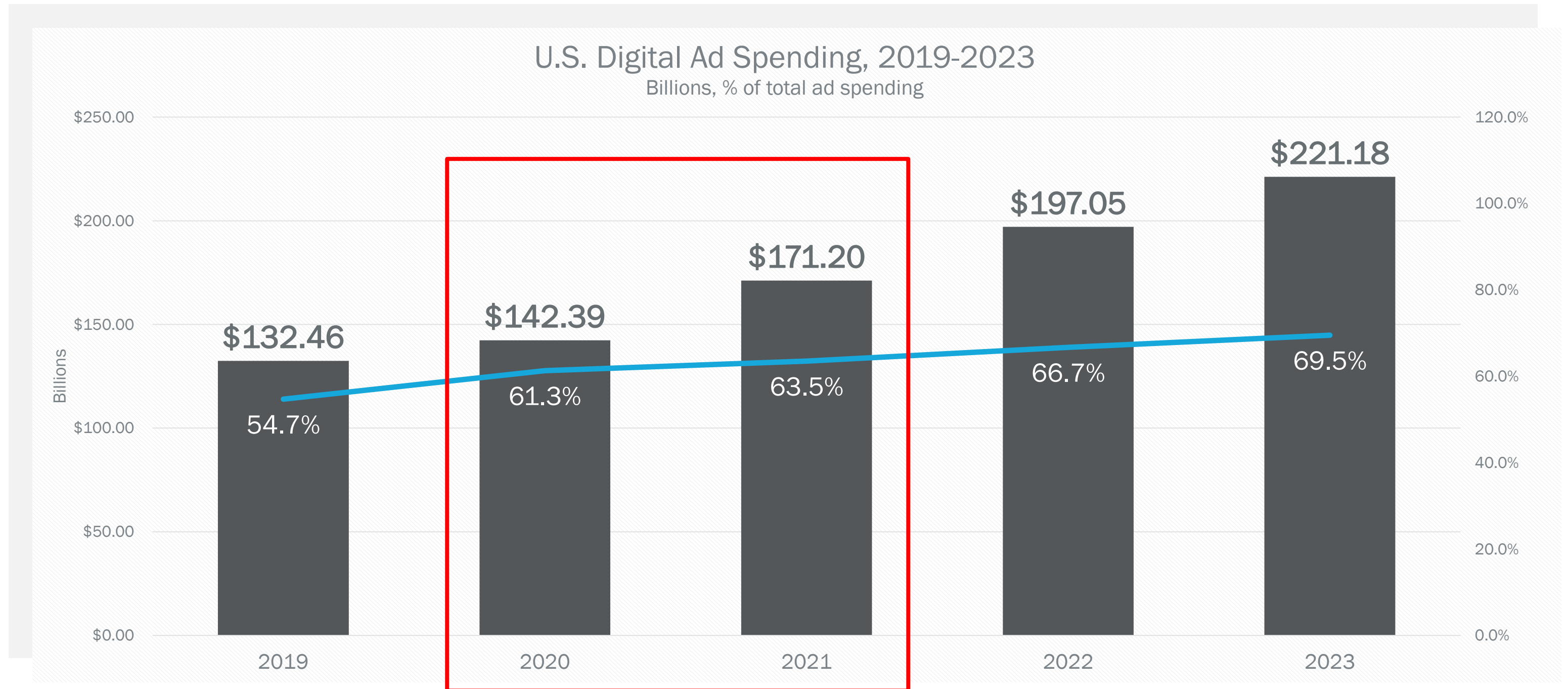
The background features a complex network of white lines forming a web-like structure over a blurred image of a large crowd of people. The lines are thin and white, creating a sense of connectivity and digital infrastructure. The crowd is composed of many small, colorful figures, suggesting a diverse group of people. The overall color palette is light and airy, with a mix of soft blues, greys, and muted colors from the crowd. The text is overlaid on the lower left portion of the image.

IMPACT ON ADVERTISING TRENDS FOR 2021

MEDIA SPEND DROPPED 4% IN 2020 BUT GOOD GROWTH PROJECTED IN 2021



DIGITAL EXPECTED TO GROW 20% IN 2021, TO ACCOUNT FOR A GROWING SHARE OF SPEND



CTV LEADS DIGITAL AD SPEND GROWTH

Digital sources driving growth of ad spend in 2021



Connected TV
+40%



Video
+26%



Mobile
+22%



Search
+20%



Display
+17%



Email
+10%

ADVANCED TV **ACCELERATES**

QUARANTINE ESCAPISM

OTT VIDEO VIEWER FORECAST
(MILLIONS)

NETFLIX
hulu

Disney+
Apple TV
prime video

CRACKLE
peacock

tubi



STREAMING WARS START LEANING TOWARDS AVOD

SVOD

(SUBSCRIPTION)

NETFLIX

73M

prime video

40M

apple tv

33M

Disney+

34M

AVOD

(AD-SUPPORTED)/HYBRID

tubi

25M

peacock

10M

PLUTO TV

24M

xumo

24M

Roku

46M

hulu

37M

sling

2.5M

VUDU

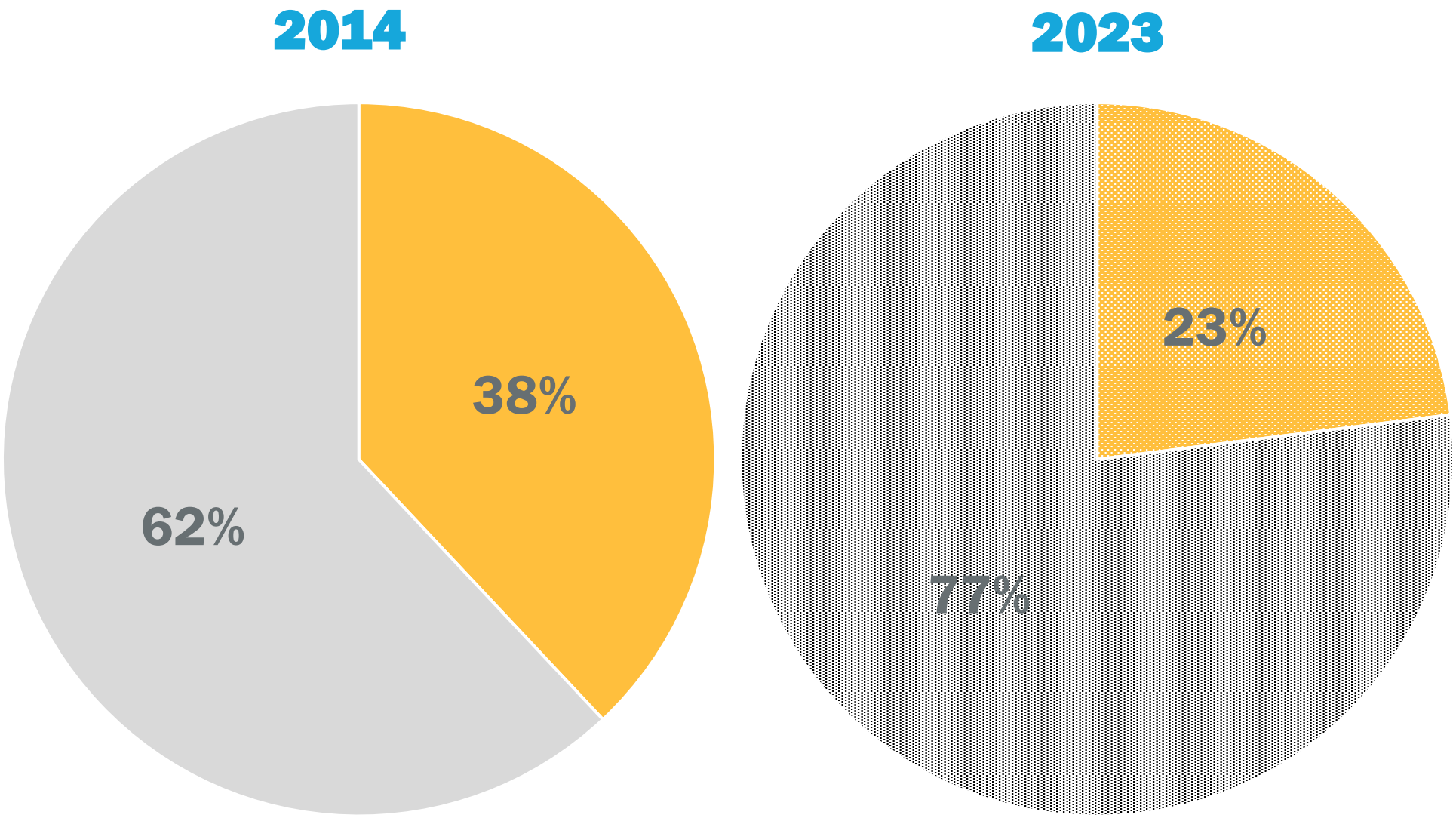
25M

YouTubeTV

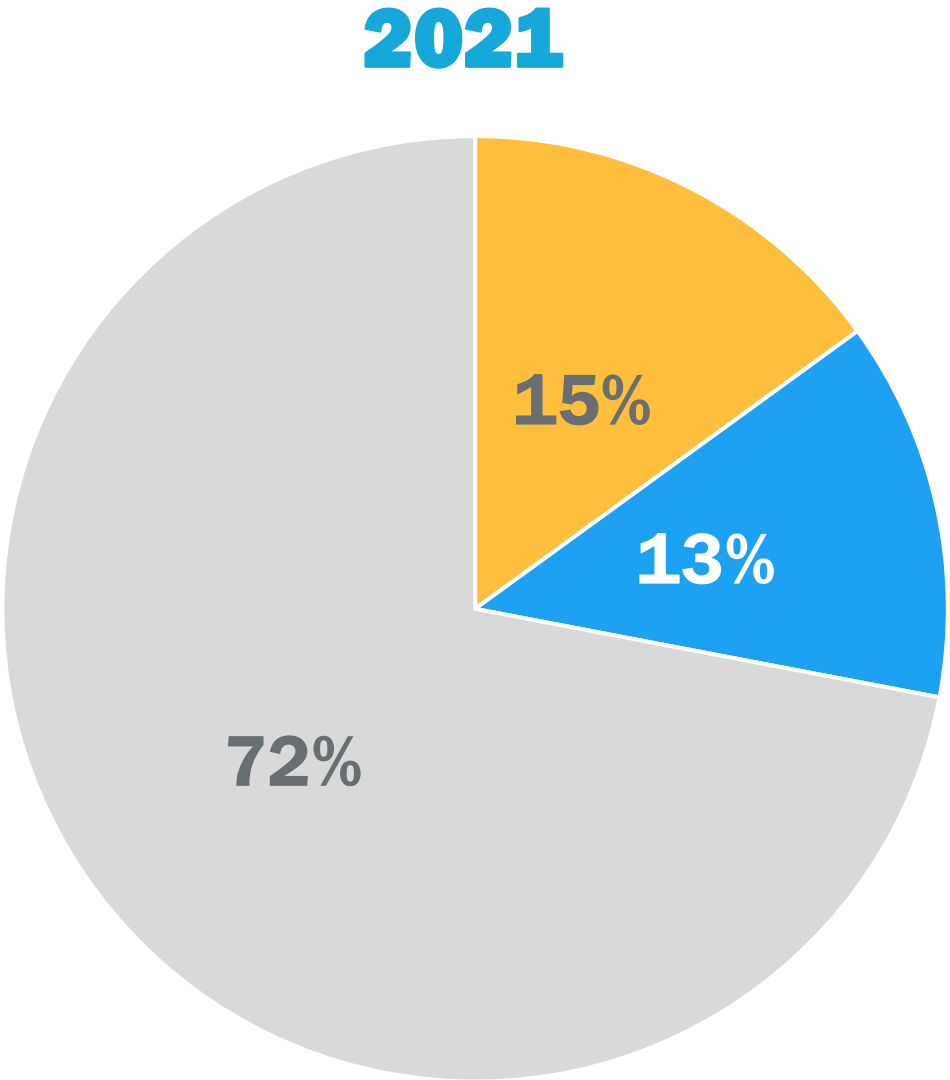
3M

LINEAR TV: PROJECTIONS VS REALITY

PROJECTIONS



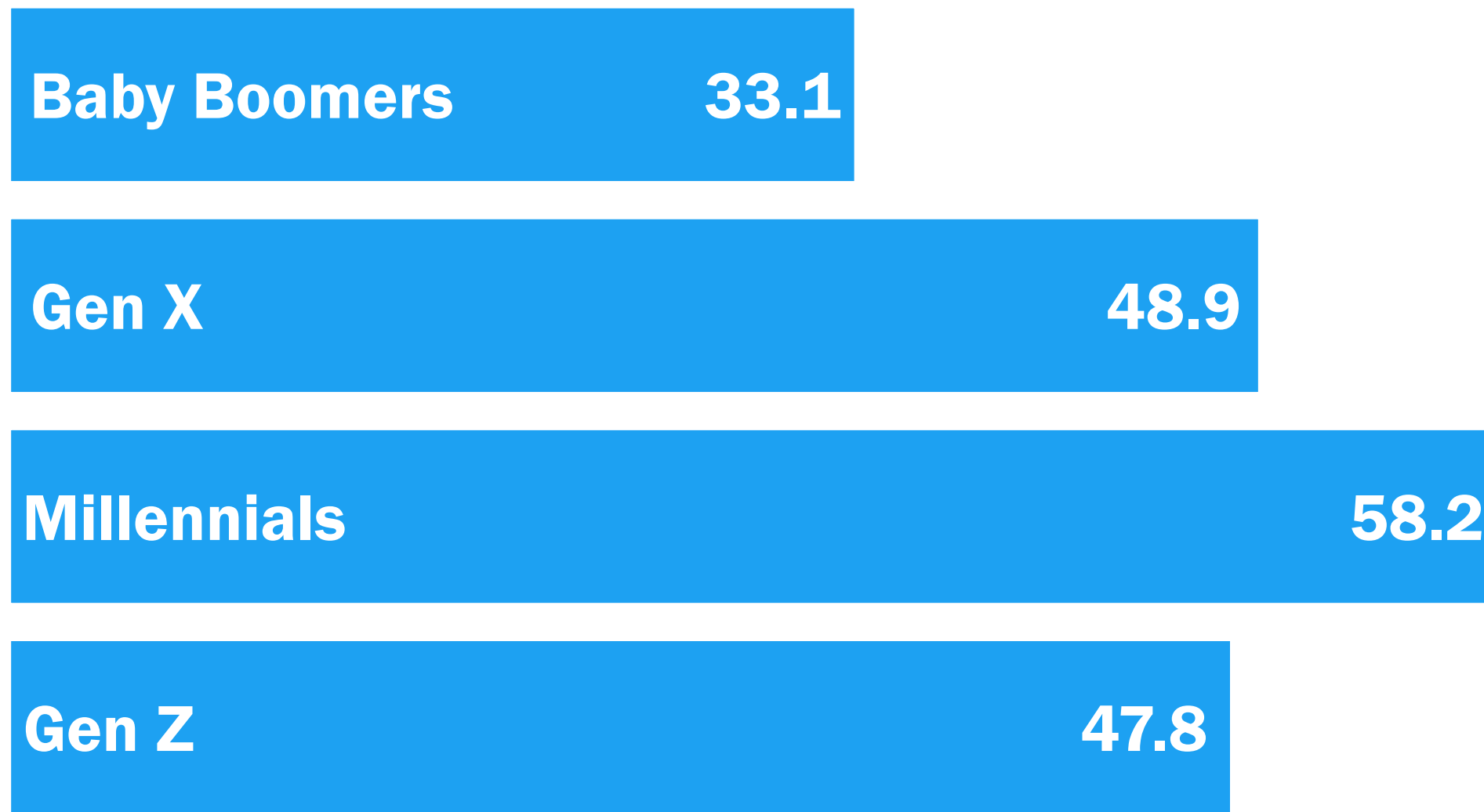
REVISED OUTLOOK



Source: eMarketer

CTV VIEWING OCCURRING AT EVERY AGE

Connected TV Viewers
(millions)



Younger audiences are more likely to be CTV viewers, but older demographics are catching up.



ADVANCED TV TAKEAWAYS

- ★ Content and consumption is growing at accelerated rates
- ★ Testing potential for sight + sound audiences is now
- ★ Scalable, quality audiences are available, improved measurement on the horizon

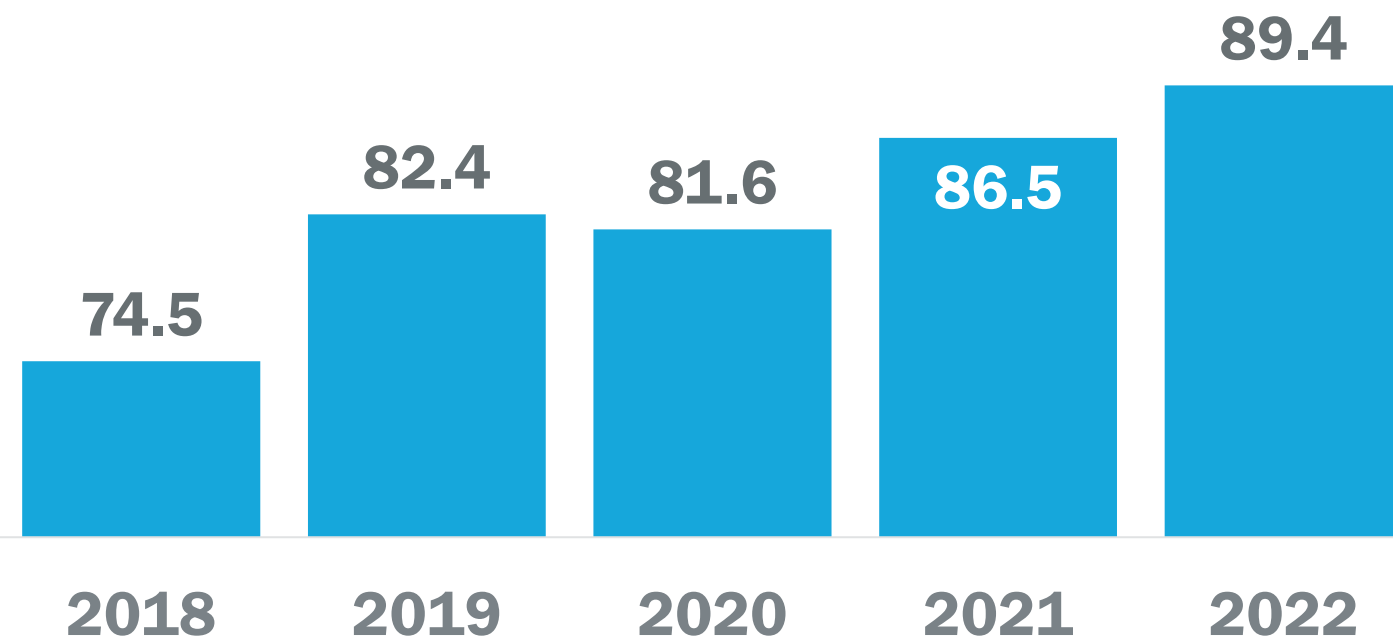


AUDIO **ACCELERATES**

TURN IT UP



Time Spent with Digital Audio
(minutes)



🔊 **86.6, UP FROM 81.6**

🔊 **6.1% INCREASE IN TIME**

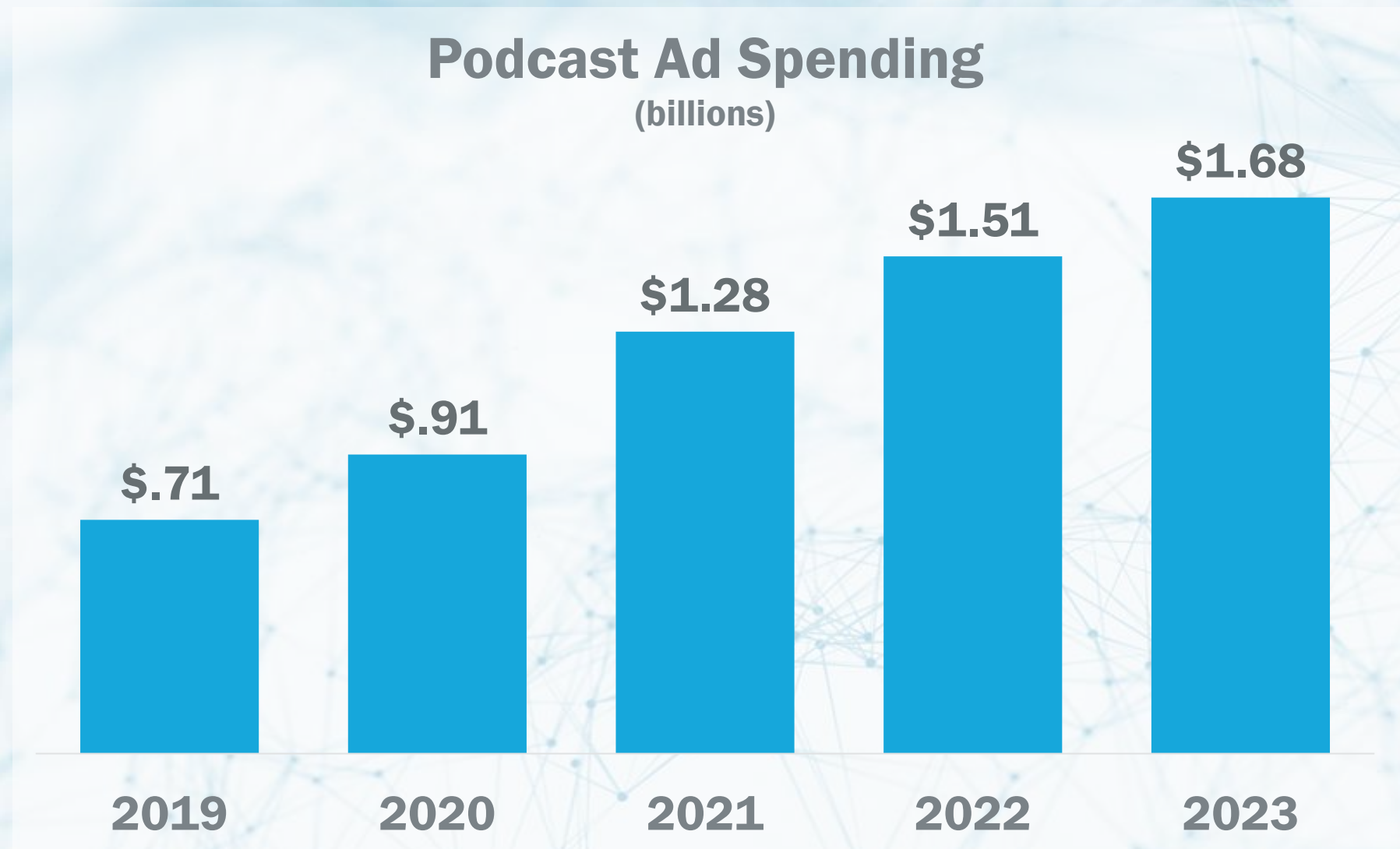
🔊 **DRIVEN BY PODCASTS**

A man with short dark hair, wearing a dark blue button-down shirt and large black over-ear headphones, is looking down at a desk. He appears to be focused on his work. The background is blurred, showing what looks like a home office or study area with shelves and books. A large, bold, blue percentage '108%' is overlaid on the left side of the image.

108%

**INCREASE IN PODCAST
LISTENING OVER 2019**

BIG ON PODCASTS



**500+% YOY
BASIS AUDIO**



pandora

amazon



1/4 OF 2021 DIGITAL AUDIO AD SPEND = PODCASTS



AUDIO TAKEAWAYS

- ★ Time spent and ad spend on audio continues to increase
- ★ Platforms are betting big through acquisitions of both content + tech
- ★ Podcasts = biggest growth

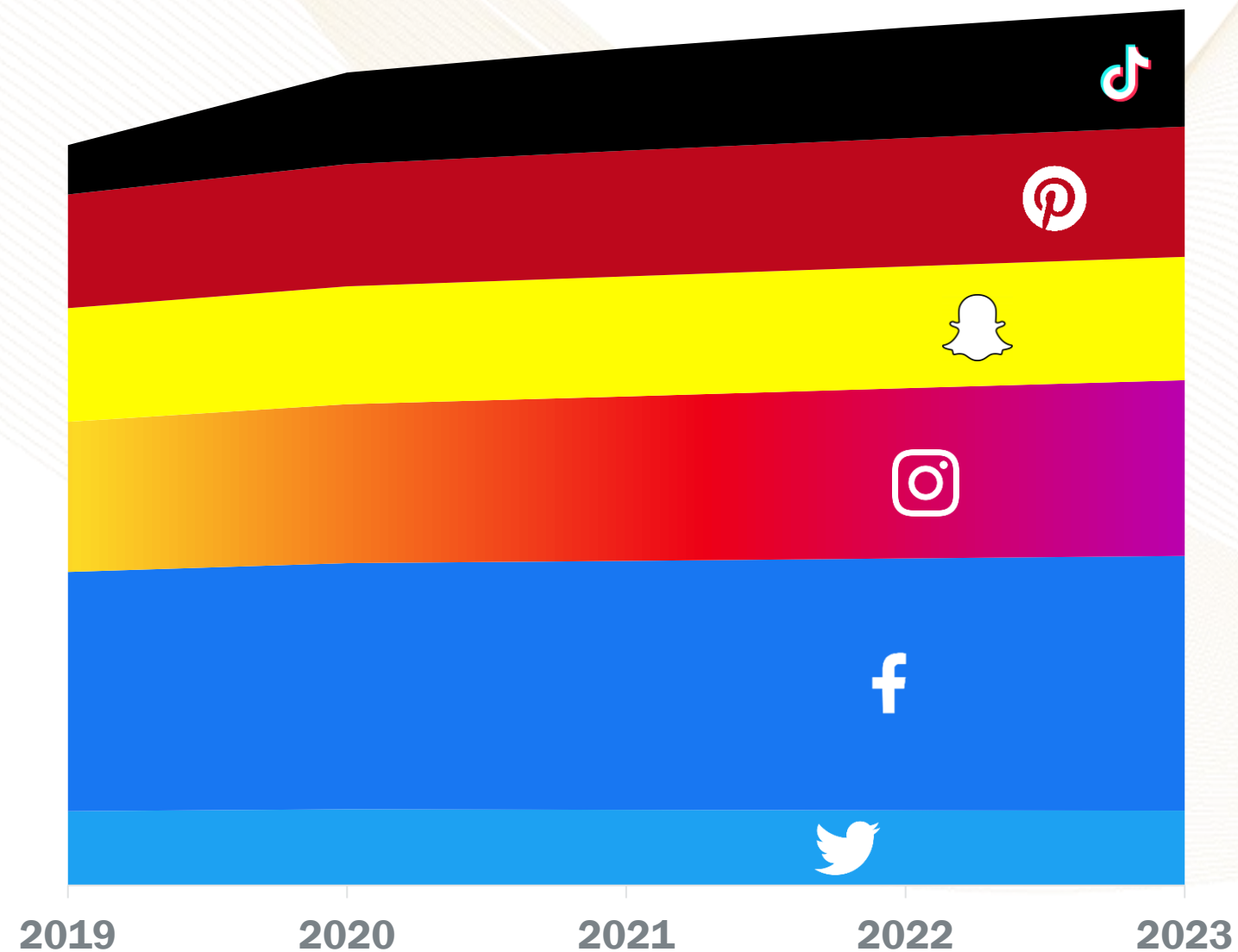


SOCIAL
ACCELERATES

STAY AT HOME, BUT BE SOCIAL

and TikTok

MAU Growth Across Social Platforms

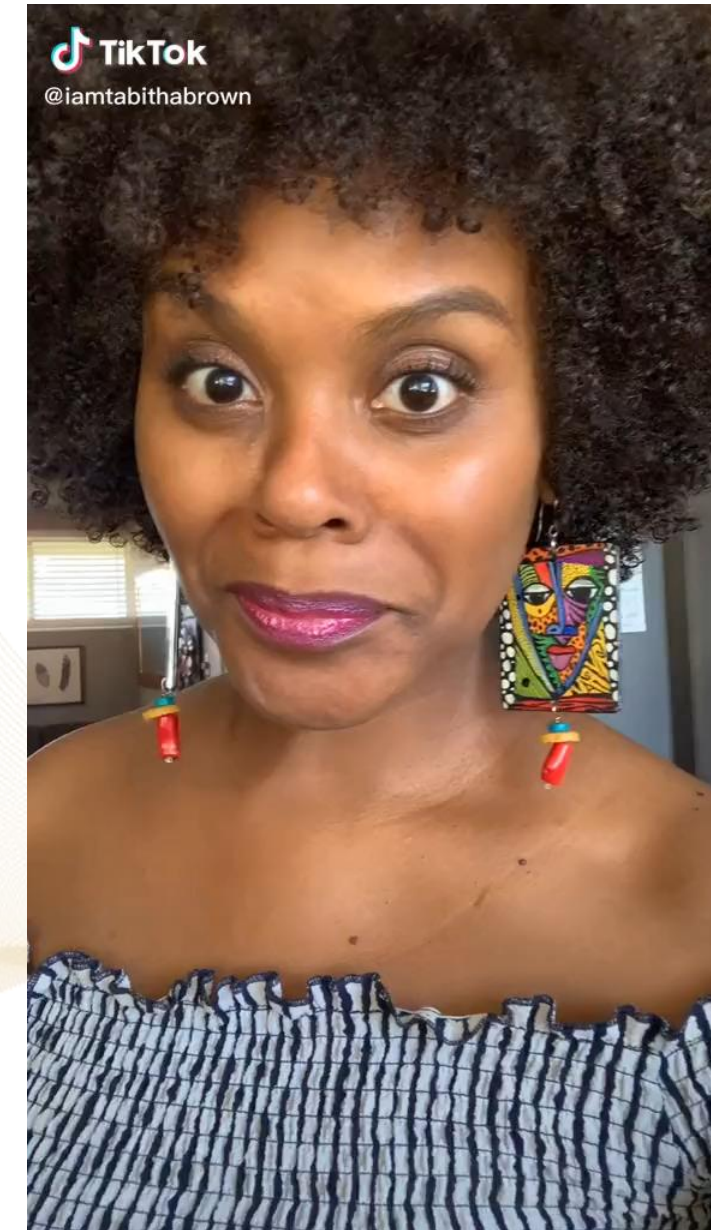
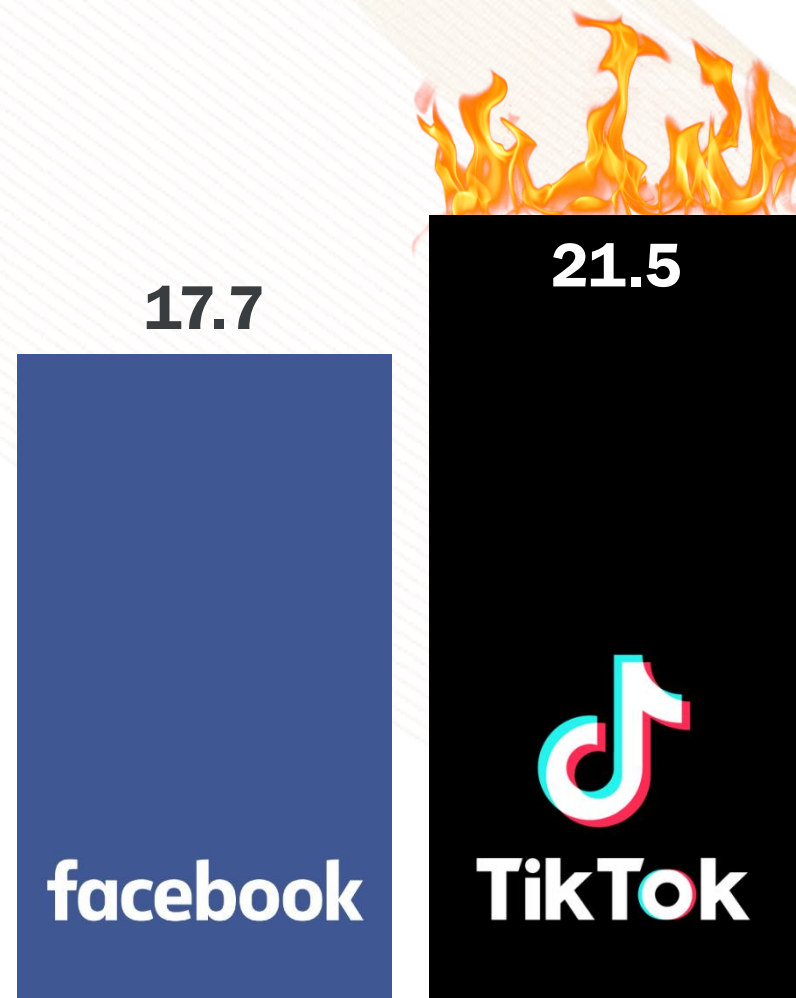


Last Year TikTok Saw:

- ② 85% jump in users
- ② Surpassed Twitter
- ② Gaining ground on Snapchat & Pinterest

TIKTOK FOR THE AGES

21.5 hours a month (compared to Facebook at 17.7)



CONTENT CREATION EVOLUTION

- ✓ Increased reliance on UGC
- ✓ Brand vs “Fan” content
- ✓ Less polished = more authentic?

92% of consumers trust organic UGC more than they trust traditional advertising

An abstract, monochromatic image of a tunnel-like structure. It features a series of white, angular, geometric shapes that recede into the distance, creating a strong sense of perspective and depth. The lighting is soft and even, highlighting the clean lines and surfaces of the structure.

SOCIAL TAKEAWAYS

- ★ Explore each platform's owned, earned, and paid opportunities
- ★ Video is a requirement
- ★ Discover the audiences available and what performance looks like



IDENTITY
ACCELERATES

THE FUTURE OF IDENTIFIERS

LOSS OF THIRD PARTY COOKIES

Most third party cookies to be unavailable by end of this year

REDUCTION IN PROBABILISTIC IDS

Significant reduction in ad signals (i.e. fingerprinting)

EROSION OF MOBILE IDS

IDFA and AAID lack cohesion with cookie support

GROWTH OF REGULATION

- GDPR
- CCPA
- CPRA

USERS GAIN MORE CONTROL OVER PERSONAL DATA

Before: Transparency

Cookie Consent

By continuing to browse or by clicking 'Accept', you agree to the storing of cookies on your device to enhance your site experience and for analytical purposes. To learn more about how we use the cookies, please see our [cookies policy](#).

ACCEPT AND CLOSE

Cookies

This site uses cookies to offer you a better browsing experience. Find out more on [how we use cookies and how you can change your settings](#).

I accept cookies I refuse cookies

Now: Choice & Control

Strictly necessary cookies

☒ On

These cookies are essential so that you can move around the website and use its features. Without these cookies services you have asked for cannot be provided.

[See list of strictly necessary cookies](#)

Functional cookies

☒ On

These cookies allow the website to re functionality and personal features.

[See list of functional cookies](#)

Set your cookie preferences for performance cookies. And if you also want to set preferences for personalised advertising.

☒ On

Use this toggle to the left to manage performance cookies. If you're outside the UK you can also manage personalised advertising cookies.

Performance Cookies for Us

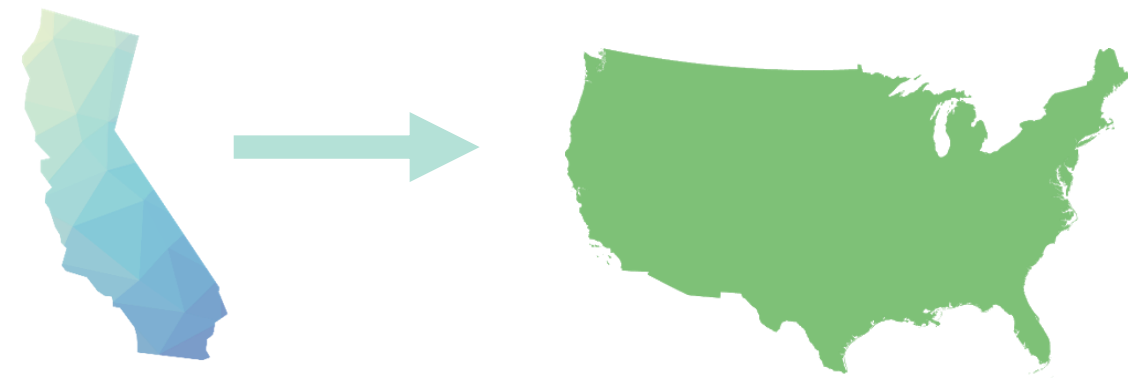
This toggle turns on BBC's performance cookies to improve the performance of the BBC website.

This website uses cookies ×

This website uses cookies to improve user experience. By using our website you consent to all cookies in accordance with our Cookie Policy. [Read more](#)

- ☒ STRICTLY NECESSARY
- ☒ PERFORMANCE
- ☐ TARGETING
- ☐ FUNCTIONALITY
- ☒ UNCLASSIFIED

ACCEPT ALL DECLINE ALL



FORECASTS FOR THE FUTURE

- ④ CPRA to take effect in January 2023
- ④ Businesses will need to create user opt-out forms
- ④ Increased penalties for the forbidden use or sharing of data
- ④ State laws make way for federal ones
- ④ Acceptable alternative ID solution still to come

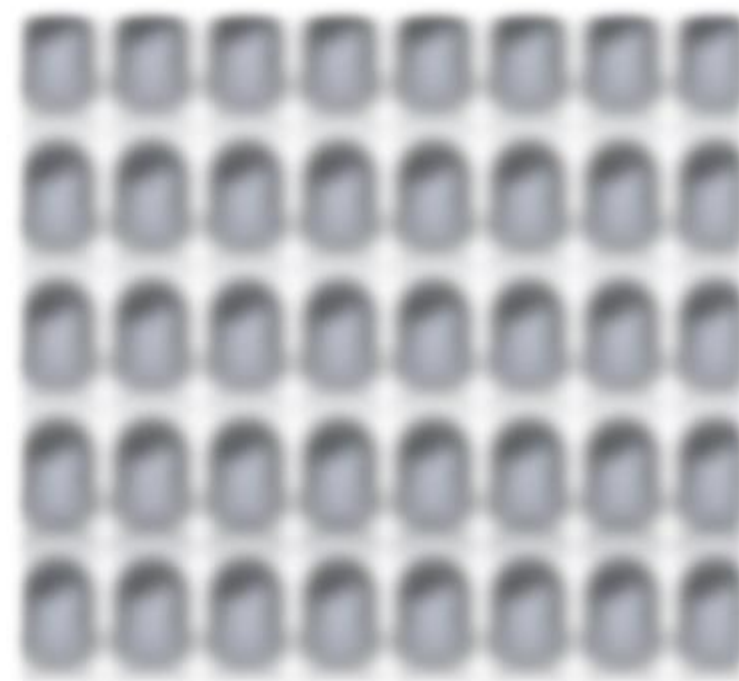
A REVISED RANGE OF ADDRESSABILITY

Privacy by Default

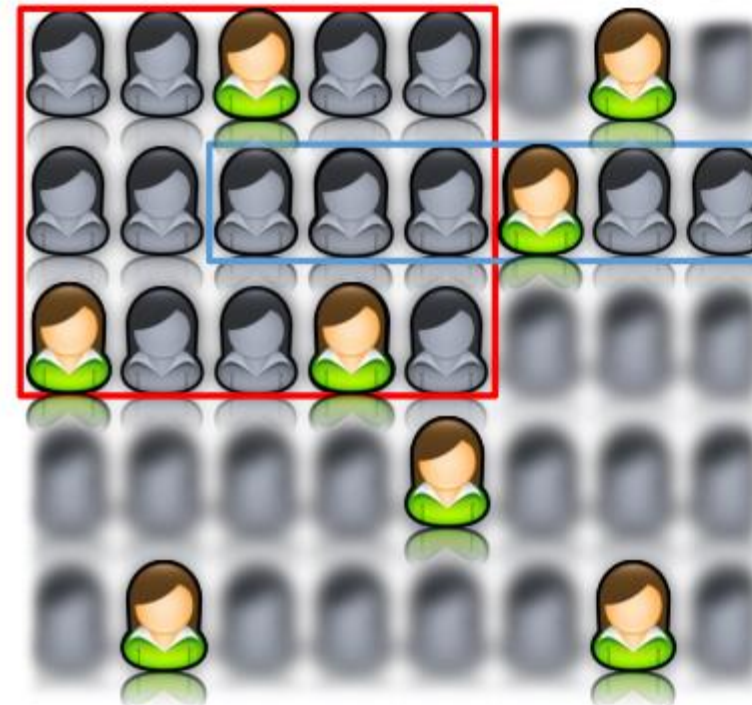
Non-addressable



On-device Audiences
(e.g., Privacy Sandbox)

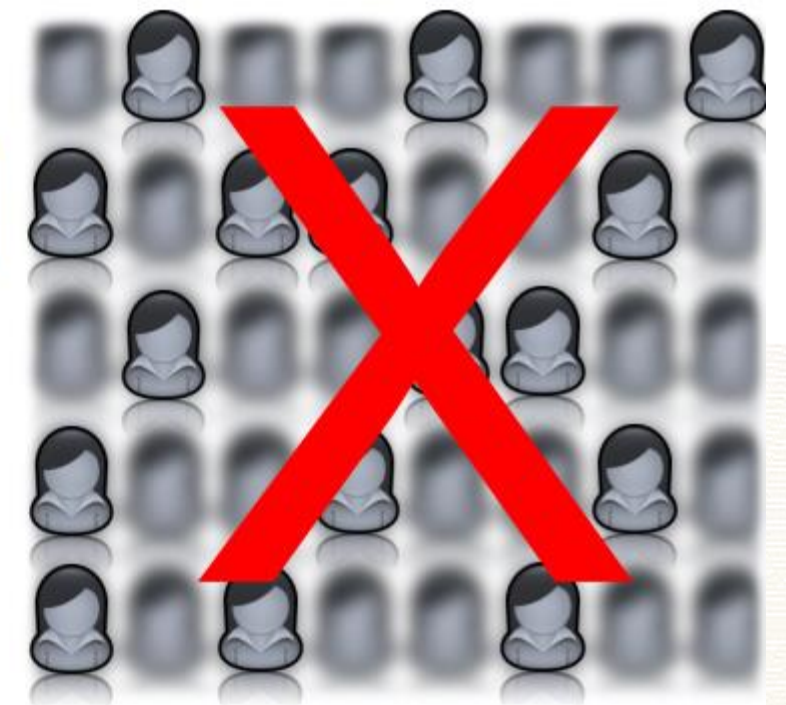


1st-party Audiences:
site/app context,
behaviors, authentication



Tracking by Default

3rd-party Audiences
(based on cross-site tracking)





IDENTITY TAKEAWAYS

- ★ Consumer expectations and understanding of privacy rights grow
- ★ Advertisers must note impact on their data usage and collection
- ★ Increased emphasis on 1st Party Data and revised 3rd party solutions

OUTLOOK 2021

- + Plan to test and shift bigger budgets into CTV
- + Look to audio to extend reach and invest in podcasts
- + Enhance your video strategy and look to new audiences across social
- + State of identity requires alternative solution development and continued education now, stricter laws to come

The background of the slide is a photograph of a modern architectural interior. It features a curved, ribbed ceiling and a large, curved wall. The lighting is soft and even, highlighting the geometric forms of the architecture.

QUESTIONS?
THANK YOU!