



NewFronts 2020: Trends & Insights



AGENDA



2020 NewFronts: What They Are & Why They Matter



Every NewFront Presentation (In Five Words or Less)



Top Five NewFronts Trends

2020 NEWFRONTS: WHAT THEY ARE & WHY THEY MATTER

Today's marketplace is rapidly changing and the NewFronts are keeping pace. While historically focused exclusively on video content, given growth in new formats, new classes of creators, new technologies, and new measurement strategies, the 2020 NewFronts were redesigned to reflect this dynamic with a common theme:

“Insight. Inspiration. Transformation.”

Due to COVID-19, brands, agencies, creators, publishers, and technologists converged via a live-streamed virtual format, to explore the latest innovation in the digital space.

The NewFronts as we know them today were made possible by one of our own agencies, Digitas. In 2012, Digitas co-founded the Digital Content NewFronts and remains the only agency to have a dedicated presentation at the annual event.

KEY STATS

50%

% Buyers Confident Budgets are Stable for rest of 2020

-20%

Expected 2020 Ad Decline Due to COVID

+13%

Expected Digital Ad Spend Growth (2H 2020 vs. 2019)

72%

% of Buyers that want Upfronts & NewFronts to merge

Source: IAB Proprietary Research

EVERY PRESENTATION (IN FIVE WORDS OR LESS)

 Roku	The Streaming Decade	 CRACKLE PLUS	Viewer First	 tubi	Power of Free	 SAMSUNG Ads	Behind the Screens
 hulu	TV for TV People		The Snapchat Generation	 CONDÉ NAST	Content Drives Conversation & Action	 team whistle	Modern Distribution Network
	Real-Time Brand Pivots	 e ellen DIGITAL NETWORK	Uplifting, Inspiring, Optimistic	 vevo	Focus on the Living Room	 BARSTOOL SPORTS	Authentic, Unfiltered, 24/7
 WSJ	The Importance of Trust	 VICE	Journalism Matters	 Quantcast	Impact of COVID through Data	 Forbes	Leading in Unprecedented Times
 n p r	Trust & Accuracy	 vibonomics	Digital Audio OOH	 AMERICAN PUBLIC MEDIA	Unexpected Angle on News	 YouTube	Personalization at Scale
 TiVO	Big Screen Reach	 TREMOR VIDEO	Reach the Modern Consumer	 xandr	Audience Led	 GSTV	Moments that Matter
	Authenticity		Don't Make Ads, Make TikToks	 3BLACKDOT	Content, Culture, Community, Commerce	 TRUOPTIK	Audience First Approach

TOP FIVE THEMES

5

MARKETPLACE
REALITY

OTT CONTINUES
TO GROW

AUDIENCE FIRST
APPROACH

REAL-TIME
PIVOTS

DIVERSITY &
INCLUSION

UNDERPINNED BY BRAND SAFETY

MARKETPLACE REALITY

CHALLENGE: The continued impact of COVID-19, stay-at-home orders, and movements for social change were touted as key drivers impacting evolving consumer behavior and media usage.

SOLUTIONS: In response, publishers are providing more behavioral insights, altering company practices and policies and experiencing traffic growth as users seek out more content. For example, **Hulu** introduced what they call “Generation Stream,” an audience united by mindset vs. demographics. **Roku** announced they will leverage IAB standard terms and conditions for the Upfront and will equalize TV pricing (e.g. :15s half the cost of :30s, :30s half the cost of :60s) while **The Wall Street Journal** highlighted record subscription growth as consumers increasingly seek out more, trusted content. **VICE**, focused on the importance of journalism, encouraged brands to revisit and review block lists to support journalism within the current marketplace.

KEY TAKEAWAY: With continued uncertainty in the marketplace, brands that are both nimble and agile will win – using data to inform decisions, influence best practices, and ultimately drive consumer engagement.

OTT CONTINUES TO GROW

CHALLENGE: As consumers adjust to more time at home, diversified viewing, particularly via OTT (subscription or AVOD) is here to stay.

SOLUTIONS: OTT continues to be the bright spot in terms of video consumption and advertiser investment, demonstrated through both research and partner statistics – Roku, Crackle Plus, tubi, Samsung Ads, Vevo, TiVo, YouTube, Tremor, and Xandr all highlighted their growth and ability to drive incremental reach for brands across screens. Publishers such as Crackle Plus and tubi further touted their ability to reach a broad range of consumers through partnerships across Xfinity, FuboTV, and FOX.

KEY TAKEAWAY: With the continued rise of OTT, consumers now think of “TV” as the physical screen – marketers must invest in a strategy that is cross-screen and audience-first.

AUDIENCE FIRST APPROACH

CHALLENGE: With diversification in content and viewing platforms, consumers are gaining more control over the content they want, when they want it.

SOLUTIONS: Publishers are committed to focusing on viewers first, with an emphasis to provide dynamic and optimized experiences for consumers wherever possible – across content, ad experiences and commerce. **YouTube's** 'Brandcast Delivered' focused on bringing personalized content to each individual, inserting people's names into their live-stream. **Hulu** announced a transactional ad format, GatewayGo, giving viewers a way to interact with a commercial and take action on a second screen. **Snapchat** announced its first 'shoppable' original, "The Drop," which will include a 'swipe to buy' call to action.

KEY TAKEAWAY: With increasing consumer control, brands should invest in personalization strategies to give their customers what they want and need.

REAL-TIME PIVOTS

CHALLENGE: With the reality of a ‘new normal’ brands and partners alike must find ways to creatively and dynamically capture attention.

SOLUTIONS: Augmented reality, live-streaming and unique creative executions are allowing publishers to increase engagement with consumers. **Snapchat** introduced “The FakeUp” which will feature augmented reality filters within the show to let users try on custom lenses and bring the show’s makeup illusions to life on their own face while **TikTok** announced ‘Branded Scan,’ a product for advertisers to create engaging AR experiences. **Facebook** highlighted fitness brand Barry’s Bootcamp, leveraging IGTV and Instagram Live to broadcast live daily workouts during stay-at-home orders. As publishers pivot to new platforms and tactics, marketers should also think about brand safety in these environments, vetting accordingly based on the content and platform.

KEY TAKEAWAY: To succeed in the ‘new normal,’ brands must pivot to new formats, but should do so in a way that is seamless and simple – integrating with publishers naturally and authentically.

DIVERSITY & INCLUSION

CHALLENGE: Given the current political and social climate, partners and the industry alike are identifying the path forward to drive change.

SOLUTIONS: As publishers highlighted increased investment in diversity programming, discussion centered around the what is needed to move the industry forward. **Condé Nast** aimed to highlight diverse content offerings, but acknowledged the need for their company and the industry to come together to support content that drives conversation and action. **VICE** recommended that brands take the current sociopolitical times as an opportunity to use a contextual approach to targeting in order to support journalism. A panel discussion hosted by the **IAB** challenged the industry to focus on better recruitment, voicing opinions and funding diverse stories.

KEY TAKEAWAY: Publishers, agencies and brands need to partner to build a community of strength, hope and resilience. In order to achieve together, we must acknowledge and diagnose the issue, build a plan of action, and maintain accountability.

THANK YOU

