Q1 2022

KICKSTARTING SALES AND MARKETING IN 2022

Our research has consistently shown a plateauing of familiarity and consideration for the majority of media companies and platforms throughout 2021, a trend that we anticipate will continue as advertisers' time, attention and resources remain divided for the near future.

One of the key factors to growing mindshare (alongside performance and reach capabilities) is differentiation. It's important, but it's increasingly difficult to convey via content marketing and advertising alone.

We polled our panel of US advertisers in January to understand what resonates when researching and choosing media partners. Below, you'll find tips on what types of content work, what resonates as quality, effective content, and which publications, conferences and trade organizations are worth their weight when it comes to partnering to promote your messaging.

Lauren Fisher
General Manager, Business Intelligence, Advertiser Perceptions

OUR QUARTERLY EARNINGS RECAP

Commerce and Premium Video Prospered in Q4 2021

Q4 2021 earnings reports from public media and ad tech companies were particularly exciting. Amazon and Walmart reported ad revenues for the first time, with $31.2B and $2.1B in ad revenues respectively. Other retailers and commerce platforms have rapidly growing ad businesses as well. Uber provides one notable example, with over $100MM in ad revenues last year and over $1B expected in two years.

Premium video continued to grow rapidly. To use one example, Paramount (formerly ViacomCBS) reported higher ad revenues in 2021 compared with 2019, despite a challenged pay-TV environment. Streaming is driving growth, with PlutoTV accounting for over $1B in ad revenues.

Our Take: For media companies and their partners, increasingly blurred lines between content and commerce businesses is the main trend to keep an eye on. Major retailers have created large and rapidly growing ad businesses based on their ownership of the point of sale. Programmatic offerings from retailers powered by their first-party data will likely gain significant market share in the coming years. While there are opportunities for media companies to partner with retailers, they are also in growing competition for ad budgets. They will need a clear message to present to advertisers.

Eric Haggstrom
Director, Business Intelligence

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PART 1

MOVING THE NEEDLE: RESEARCH SELLS

The rise of content marketing necessitated brands to think like publishers. But as advertisers struggle to find time and resources to effectively do their jobs, media companies question the most effective way to get their messaging across.

The short answer? Research sells. A January 2022 poll of 300 US advertisers and agencies found less than 1 in 2 said seeing media and ad tech brands at tradeshows and conferences made them more likely to want to do business with them, with 1 in 2 saying the same of brands who frequently issue whitepapers and webinars. Instead, advertisers were more likely to say that seeing media companies partner with industry trade organizations, consultants or research firms to issue research were more likely to make them want to do business with those companies.

Market research also topped the list of the most useful information for advertisers when initially learning about industry topics and when narrowing down their vendor set. Case studies, which are often data-driven, as well as peer recommendations were also top rated.

Case Studies, Market Research And Peer Recommendations Top The List Of Most Useful Information When Learning About An Industry Topic And Vetting A Shortlist Of Potential Media & Ad Tech Partners

TOP-10 MOST USEFUL INFORMATION WHEN INITIALLY LEARNING ABOUT INDUSTRY TOPICS OR DEVELOPMENTS

TOP-10 MOST USEFUL INFORMATION WHEN NARROWING LIST OF POTENTIAL MEDIA AND AD TECH PARTNERS

SOURCE: Advertiser Perceptions, Monthly Omnibus, January 2022

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Research coming from reputable companies that is presented in an unbiased manner carries weight for the greatest number of advertisers. And advertisers continue to express interest in content that can educate them. From other Advertiser Perceptions studies, we know calls for such education may mean content that gets them up to speed on new topics and areas of the advertising industry. More often, they are looking for insights specific in nature to their business or industry, making one-to-one communications key for assessing opportunities for further enrichment.

Most Important Criteria for Assessing Value of Information/Thought Leadership, By Rank

1	1	3	4	5
REPUTATION OF INFORMATION SOURCE	UNBIASED VIEW	CONTAINS TANGIBLE RESULTS AND DATA VS. OPINION	TEACHES ME SOMETHING NEW	CONTAINS CASE STUDIES

SOURCE: Advertiser Perceptions, Monthly Omnibus, January 2022

Finally, the importance of data-backed case studies rings true. While many case studies are more testimonial in nature, our findings suggests advertisers really want facts that speak to tangible lifts in performance and solving business problems. What data-driven insights sell? Conversations with advertisers tell us they are looking for vertical-specific case studies primarily, but they will often settle for case studies related to their KPIs, even if the case study features brands outside their vertical.

Given the desire for more specific insights, it's not surprising that sales outreach may have the upper hand over more generic marketing communications. Common marketing touchpoints, including general purpose news and information and email newsletters, were much less cited as useful forms of information for growing industry knowledge or homing in on a partner than were meetings with sales representatives.

AUDIENCE MATTERS:
HERE ARE THE TOP DIFFERENCES WE SAW IN HOW ADVERTISERS APPROACH THEIR CONTENT CONSUMPTION

Agencies were significantly more likely than marketers to value case studies as a way to learn about industry topics.

Senior-level marketers significantly valued trade news and information more (The top-5 most used sources being AdWeek, LinkedIn, AdAge, Forbes and the New York Times), whereas junior-level marketers were more likely to look at market research.

Size also matters when looking at market research: Smaller spenders (those spending less than $25M on advertising annually) were significantly more likely to cite market research as useful information when initially learning about industry topics; however, market research was still no. 2 for larger spenders.

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PART 2

IS MORE VIDEO THE WAY TO GO?

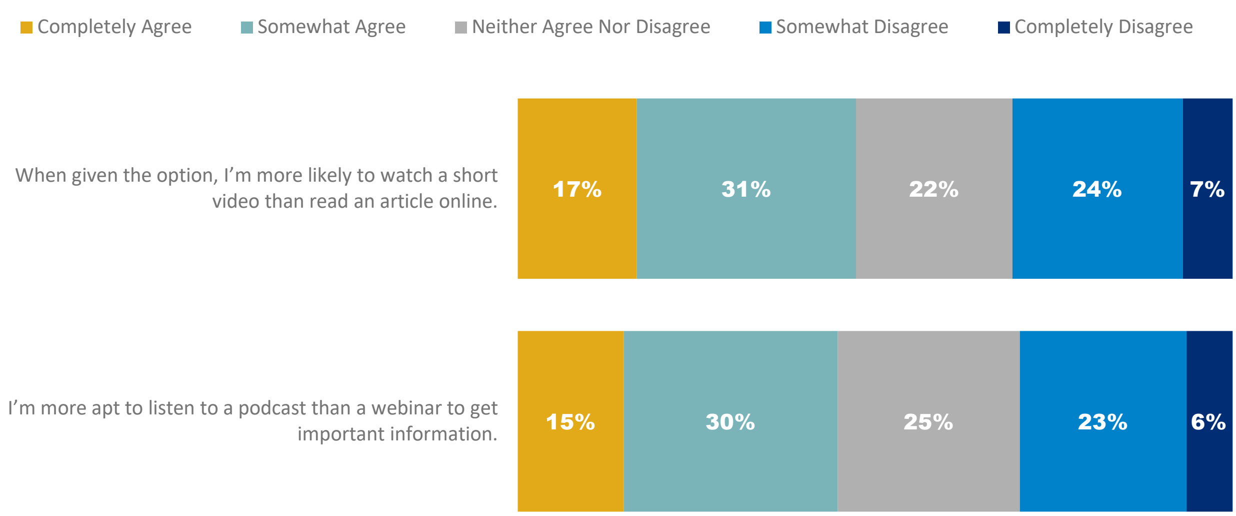
Multimedia may be the mandate for media companies looking to generate content and marketing materials that are more likely to capture attention, but advertisers aren't fully sold on consuming video or podcasts to keep up with industry news and information.

Under half of US advertisers agreed they were more likely to watch a short video vs. read an article online when given the option. While senior-level marketers were more likely to agree they would watch an online video vs. their junior-level counterparts, they were instead more likely to share and receive written content vs. videos with their peers and counterparts.

CONTENT CONSUMPTION: Advertisers Slightly More Open To Watching Short Videos Vs. Reading An Online Article

ADVERTISERS SLIGHTLY MORE APT TO LISTEN TO A PODCAST VS. A WEBINAR TO GET IMPORTANT INFORMATION

AGREEMENT STATEMENTS: PREFERENCES FOR KEEPING UP WITH INDUSTRY NEWS AND INSIGHTS



SOURCE: Advertiser Perceptions, Monthly Omnibus, January 2022

As for longer-form content like webinars, just 45% of advertisers agreed they were more likely to listen to a podcast vs. attend a webinar to get important industry information. While podcasts may not be seen as effective overall vs. some other content delivery vehicles, they still have the edge over webinars when it comes to keeping up on industry news.

PART 3

TRADE EVENTS AND ORGANIZATIONS: ADVERTISING WEEK AND ADWEEK MOST POPULAR

While in-person events and conferences have historically provided media companies with an attractive venue for one-on-one meetings and flashy sponsorships, the pandemic still heavily affects advertisers' enthusiasm for these engagements.

Just 1 in 3 advertisers said their ideal way to access industry news and information was at in-person conferences. However, media companies hoping to target senior-level executives may have better luck: 2 in 5 senior-level advertisers were more likely to agree their ideal way to access industry news and information was at in-person conferences vs. 1 in 4 junior-level advertisers.

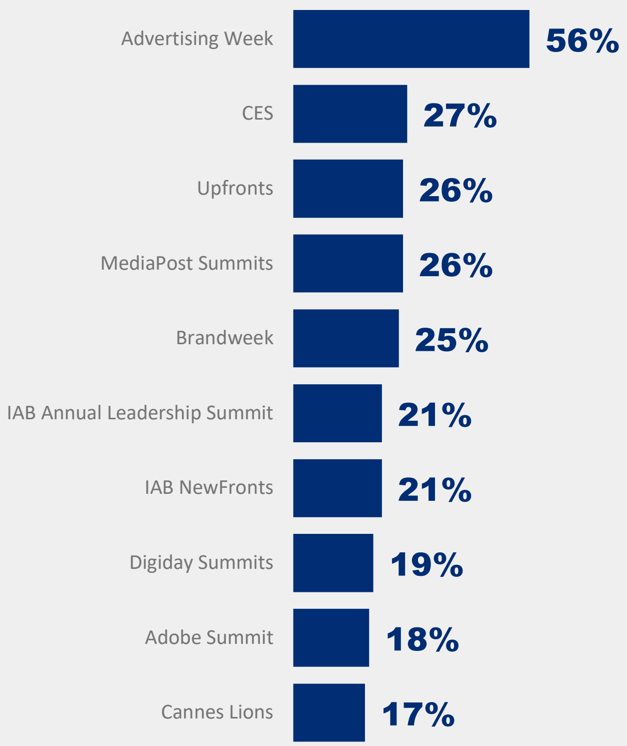
For those looking to make the most of their in-person experiences, Advertising Week may offer the greatest payoff. More than half of respondents said Advertising Week was most important for media brands to have a significant presence at, the clear leader. CES, Upfronts, MediaPost Summits, Brandweek and IAB-hosted events were also mentioned, but by half as many advertisers.

As for the top trade publications for the latest industry news and information? AdWeek and AdAge topped the list, followed by LinkedIn and MediaPost. AdWeek and AdAge were significantly more favored among agencies vs. marketers; media companies looking to reach marketers may have better luck with LinkedIn.

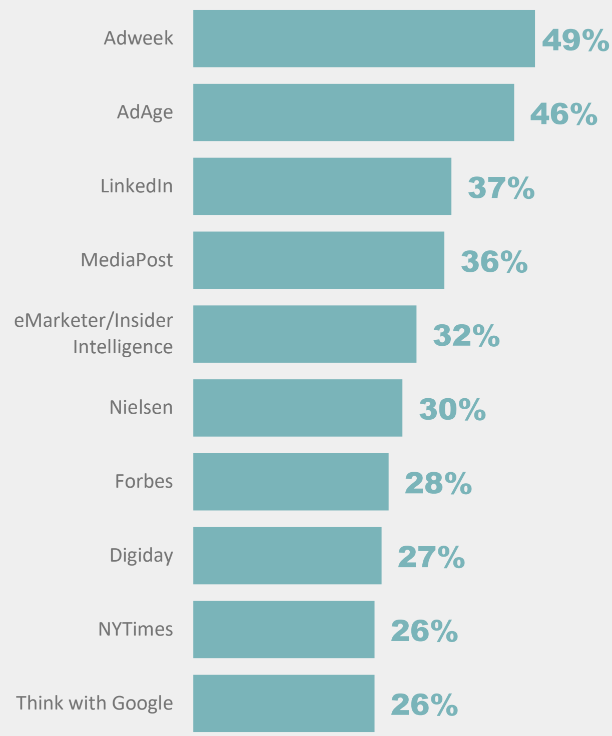
1 IN 2 BELIEVE MEDIA BRANDS MUST HAVE A PRESENCE AT ADVERTISING WEEK

Adweek, LinkedIn, and AdAge are Important Trade Publications to Align With

TOP-10 MOST IMPORTANT MEDIA EVENTS FOR BRAND TO HAVE A SIGNIFICANT PRESENCE



TOP-10 BEST SOURCES FOR LATEST NEWS AND TRENDS IN MEDIA AND AD INDUSTRY



SOURCE: Advertiser Perceptions, Monthly Omnibus, January 2022

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THE UPFRONTS CHECKLIST

Five Things Advertisers Want to Know About Upfront Opportunities

Sure, celebrities and new content and product releases make the Upfronts and NewFronts memorable, but as media companies prepare for the 2022 Upfront/NewFront season, there are concrete criteria they need to convey clearly.

Findings from our June 2021 Upfront and NewFronts Impact Report showed advertisers vet Upfront partners on the following five criteria. While these won't ensure an impactful presentation, they are critical requirements for all advertisers considering media partners' upfront capabilities.

FLEXIBILITY AND WILLINGNESS TO NEGOTIATE RANK AMONG THE TOP FACTORS WHEN ADVERTISERS EVALUATE UPFRONT PARTNERS

TOP FACTORS WHEN DECIDING WHICH MEDIA COMPANIES TO BUY "UPFRONT" | RANK 1-3

32% PERFORMANCE GUARANTEES

29% TARGETING/ DATA OPPORTUNITIES

27% ACCESS TO PREMIUM QUALITY PROGRAMMING

26% WILLINGNESS TO NEGOTIATE

25% FLEXIBLE CANCELLATION OPTIONS

SOURCE: Advertiser Perceptions, Upfront / NewFronts Impact Report, 2021

FINAL THOUGHTS

Share of voice in the marketplace is getting harder to achieve, and simply increasing the frequency of communications and touchpoints is not enough to break through.

Advertisers are looking for research and data-driven insights that are reputable, unbiased and speak to their specific pain points. They encourage one-on-one interactions; they expect those interactions to teach them something new about their industry or business and give them tangible proof of vendor worth. Media companies that invest in content that helps clients know where to prioritize today, and how to plan for tomorrow will be the ones to win mindshare. From there, it's about selling proof of performance and value–both of which must be proven via an understanding of an advertisers' unique business goals and pain points.

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GAIN CONFIDENCE IN EVERY BUSINESS DECISION YOU MAKE

Advertiser Perceptions is the global leader in research-based business intelligence for the advertising, marketing, and ad technology industries. Our expert staff delivers an unbiased, research-based view of the advertising market with analysis and solutions tailored to your specific KPIs and business objectives. These insights provide you with the confidence to make the very best organizational, sales, and / or marketing decisions, driving greater revenue and increased client satisfaction.

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2022 SYNDICATED REPORT SCHEDULE

Q1
- AIR 2H 2021
- CTV Report Wave 2
- SMB Advertising Report Wave 3
- Cookieless Future Buy-Side Report Wave 2
- Cookieless Future Sell-Side Report Wave 2

Q2
- SSP Report Wave 9
- DSP Report Wave 12
- Identity Resolution Report Wave 4
- CDP Report Wave 5
- Digital Advertising in Retail Report Wave 4
- Corporate Media Portfolio Report 1H 2022
- Trust in Advertising Report 1H 2022
- 2022 Podcast/Digital Audio Report

Q3
- AIR 1H 2022
- CTV Report Wave 3
- 2022 Video Ad Convergence Report (packaged with CTV)
- SMB Advertising Report Wave 4
- 2022 Influencer Marketing Report
- 2022 Branded Content Report
- 2022 Upfront/NewFronts Impact Report

Q4
- SSP Report Wave 10
- DSP Report Wave 13
- Identity Resolution Report Wave 5
- CDP Report Wave 6
- Digital Advertising in Retail Report Wave 5
- Corporate Media Portfolio Report 2H 2022
- Trust in Advertising Report 2H 2022
- 2022 Mobile App Advertising Report

For more information about our services or to arrange a briefing, please contact us at 212-626-6683 or info@AdvertiserPerceptions.com

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