

COMCAST ADVERTISING AGENCY LEADERSHIP COUNCIL

For Agencies 2020 was

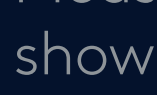
A Year of Adversity, Complexity and Opportunity

Let's take a look at some of 2020's major industry topics and see how global agencies are approaching the new year.



MEASUREMENT

Measurement continues to be one of the most critical issues for both the buy-side and sell-side and the whole industry is looking for workable solutions. There is a need for ongoing innovation in a space that has tended to lag media consumption trends and relied on imperfect data sets.



Measurement will be the word of the year in 2021. As consumers have clearly shown they are in control of their experiences with brands and with media, it's imperative our industry works collectively to evolve to a consumer-centric, cross channel and platform measurement solution, that can be used universally as a future trading currency and benchmark for the efficiency and effectiveness of all brand communications efforts.

— Michael Law, President Amplifi USA (Dentsu Aegis)



PROGRAMMATIC

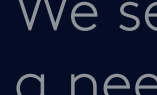
Programmatic guaranteed has grown exponentially and proven its efficiency, accelerating its adoption amongst premium video environments.

With convergence, the media landscape is becoming far more liquid, driving further the adoption of programmatic to every channel. All players in the ecosystem will need to adapt to new market dynamics as well as new ways of buying inventory.



Programmatic has seen an increased focus this year due to both the pandemic and increased efficiencies available to both advertisers and agencies. We are experiencing advertisers considering more channels across the programmatic spectrum and this is forcing a fast paced industry to move even faster. I for one am enjoying the speed at which we are being forced to adapt and learn in this space and as programmatic is still very complex, we can and should learn from each other with much co-operation.

— Tim Willcox, Managing Director, Dentsu Central Programmatic



Two factors are driving new investment behavior in the TV space: increased buying automation and utilizing data for enhanced targeting. We see increased programmatic interest and activity, directly driven by a need to drive efficiency, the higher volume of options in terms of supply and investment options, and the unique dynamics of 2020 and into 2021.

— Hayley Diamond, EVP, US Digital Investment and Partnerships, Publicis Media



DIVERSITY, EQUITY & INCLUSION

As Black Lives Matter gained global attention, it became a catalyst and a symbol of advocacy for more diversity, equity and inclusion throughout the industries and the media world. There's much the agency world can do to make progress in the industry and champion the communities of underrepresented groups.



Diversity, equity and inclusion is a way of life not a moment. We must reimagine the industry with inclusion to open all the possibilities – stronger impact, increased engagement, and more purposeful work. There is a framework for success, our three "A's." Acknowledge and Assess – being thoughtful about what we are trying to solve. From there, we place real strategic actions against those challenges, and identify how quickly we can resolve them. The last "A" is accountability. This is critical. How do we hold ourselves and others accountable, and not in a way that is punitive, but in a way that is additive and where value is created. If teams do not acknowledge and assess their culture before they create strategic actions to evolve there can be no accountability for their inclusion goals. All three of the "A's" must be accomplished for success. This way our momentum can be more than just a moment.

— Monique Nelson, Chair & CEO, UWG



This has to be a key objective for our industry, it's not ok to sit on the sidelines and hope someone else will do it. As leaders of businesses we have to be better educated, better educated in recognizing that we don't know what we don't know. Learning more and learning how to actively make those opportunities available to all.

— Stephanie Marks, Managing Director, Havas UK



UNIFICATION / FUTURE OF TV

Streaming television content has accelerated significantly and is now 25% of total video consumption. The fragmentation of viewing has brought with it significant operational and technical challenges for the industry. Creating scale and simplicity in the premium video ecosystem is key to enabling TV advertising to be planned and bought holistically.



OTT and CTV's scale and maturity has placed it on an even playing field with linear TV in terms of quality and engagement and offers incremental audiences via advanced targeting capabilities. Holistic planning across all flavors of TV will be key to take full advantage of the strengths of each that marketers can maximize unduplicated reach and use the strengths of each platform to deliver the right advertising message.

— Marissa Jimenez, President, MODI Media



ADDRESSABLE TV

While television has begun to embrace data for targeting, measurement and attribution as fundamental capabilities, it must continue to evolve in these areas to ensure its continued growth and relevancy to marketers. The key to this is enabling addressability on all forms of television. In June, nine programmers lined up to begin addressable trials for project OAR (Open, Addressable, Ready) and AMC is the first to join Comcast Advertising's [On Addressability](#) in the U.S. France passed a law to allow for spot replacement on linear feed and more convergence. 2021 will be the year of acceleration for addressability.



Addressable TV is taking significant steps in its evolution as programmers are opening up their national inventory and new solutions are being tested. 2021 promises to unlock new levels of scale for advertisers looking to reach specific desired audiences in a premium environment that clients value.

— Jason Han, SVP of Addressable Innovation, Matterkind



Addressable and CTV, that work through digital metrics, represent an opportunity for TV broadcasters to contain native digital players growth and maintain or improve their overall share of investments. In this fast changing context, it's crucial to find common audience metrics and agreed weighting factors that allow agencies and advertisers to measure and compare linear TV and all these new "digital" formats" broadcasted through CTV and STB. To do that, data is key, without forgetting that if the data is not linked to content, it loses its value.

— Andrea Conte, Chief Revenue & Profitability Officer, Havas Media Group Italy