

Watch for CTV and social platforms at this week's NewFronts

Article

The **IAB NewFronts** kick off today—the digital counterpart to the TV upfronts, where streaming companies, publishers, social media companies, and more will pitch advertisers on their digital video offerings for the year. There are two big ad categories to watch this time around: connected TV (CTV) and social media, both of which are rapidly growing and have

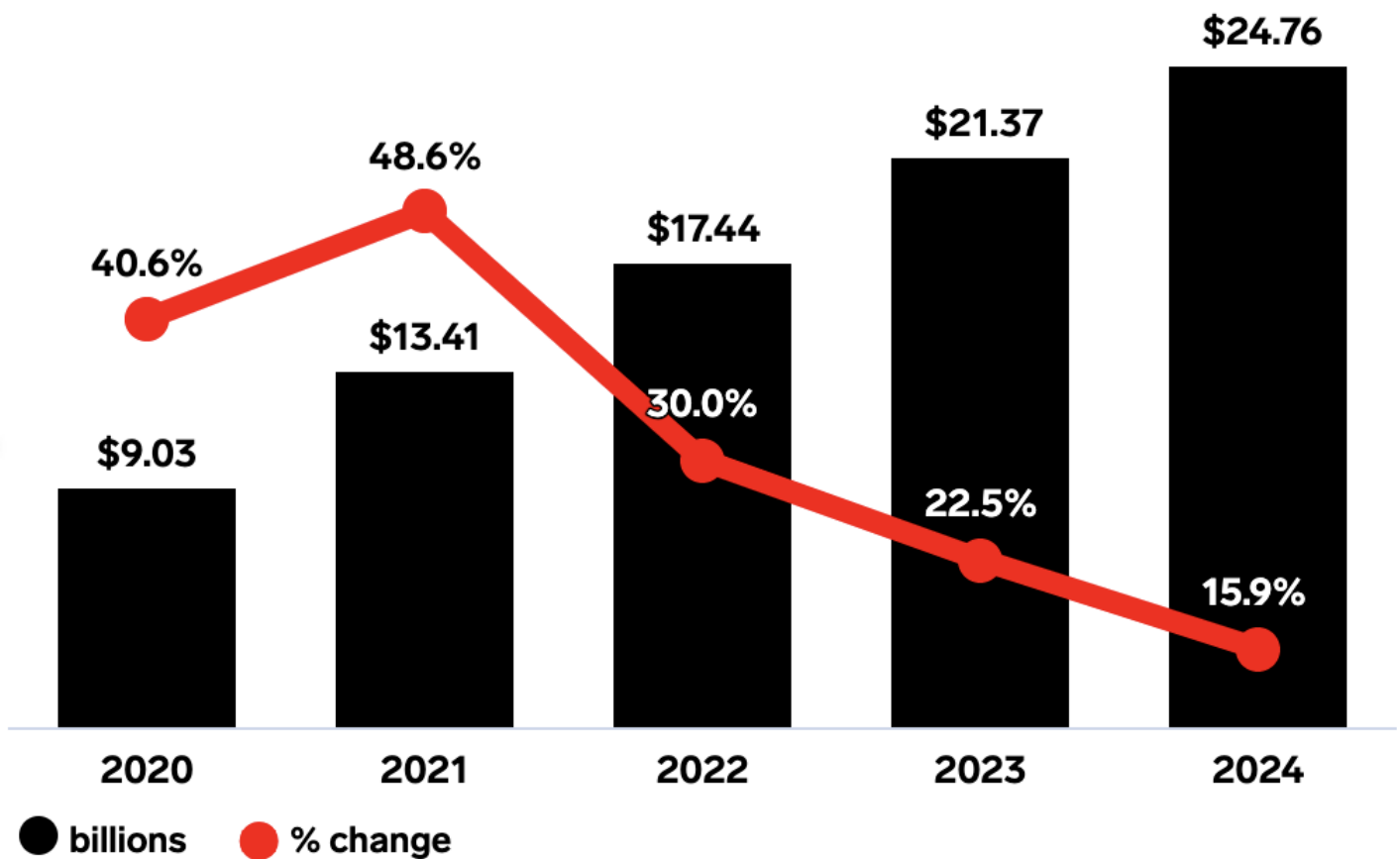
seen a lot of new ad products released over the past year. Below is a breakdown of the who, what, when, and why—as for the where, it’s all online and remote this year.

CTV

- **When and who:** The schedule is front-loaded with major CTV players: Roku, Samsung Ads, and NewFronts newcomer Amazon are all set to present today. Ad-supported streamers with a lot of CTV inventory like Tubi and fuboTV are also slated for today, and YouTube will present first thing tomorrow morning.
- **Why it matters:** CTV **will be** a top-priority venue for advertisers this year, with over half (54%) of US digital media professionals naming it a leading priority for 2021, per an October 2020 survey by Integral Ad Science. We **estimate** that US CTV ad spend will grow even faster this year than last, up 48.6% year over year (YoY) to \$13.41 billion.
- **What to look out for:** Roku is first up today. The company has been busy in the past year, **snagging** the rights to Quibi’s original content library, **launching** a branded content studio, and **acquiring** a piece of Nielsen’s business, so its presentation is likely to be packed to the brim. Amazon has a lot of catching up to do with Roku, but it’s also been rapidly building out its ad offerings on **Fire TV** and its ad-supported streamer **IMDb TV**.
- On the streamer side, YouTube **was** the largest CTV ad seller in the US last year, and we expect more viewing on the platform to **shift** to CTV screens in the future. Marketers should keep an eye on its Tuesday presentation, if only for insight into how the company is approaching the biggest connected screen in the home.

Connected TV Ad Spending

US, 2020-2024



Source: eMarketer, March 2021 (see below for notes and methodologies).

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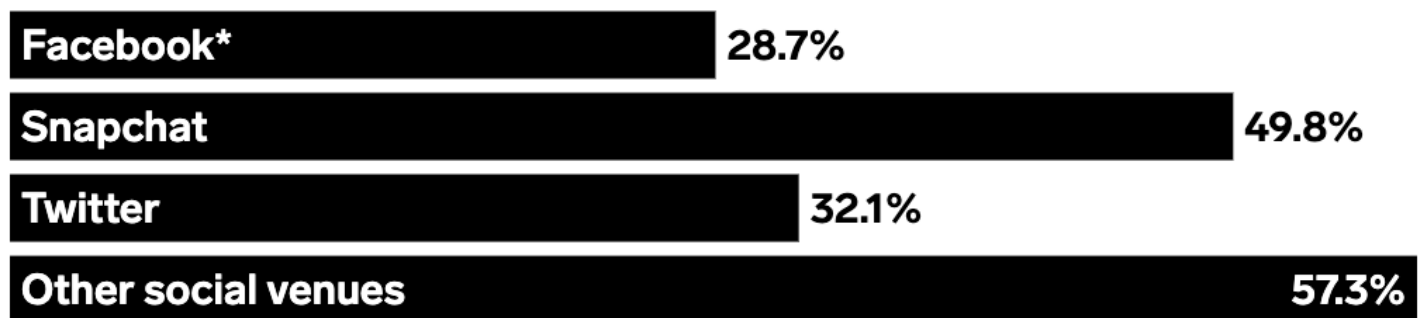
Social

- **When and who:** Snap and Twitter are presenting Wednesday, and TikTok's sophomore year presentation will kick off Thursday.
- **Why it matters:** We **forecast** that US social network video ad spending in 2021 will grow by nearly a third (31.0%) YoY to \$19.22 billion, and though nonparticipant Facebook leads the pack in terms of revenues, both Snap and Twitter are **growing** at a faster rate—49.8% and

32.1%, respectively. (We don't break out TikTok, but "other" social venues will grow even faster, at 57.3% YoY.)

- **What to look out for:** Snapchat announced during its earnings call last week that it's already **tripled** the amount of upfront commitments from brands compared with last year, making its ads a hot commodity for this year's NewFronts. Its biggest new offerings will likely be attached to its TikTok competitor Spotlight, which it launched late last year.
- But the biggest social player to watch will be TikTok. It's been rapidly introducing new **ad products** and **features** over the past year, especially in cutting-edge areas like social video ecommerce and livestreaming, and it shows no signs of slowing.

Social Network Video Ad Revenue Growth, by Company US, 2021, % change



Source: eMarketer, March 2021 (see below for notes and methodologies).

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