

FOR PUBLISHERS 2020 WAS

A YEAR OF CHALLENGE, ADAPTATION & GROWTH

Look back at some of the industry's major events and highlights from the U.S. and European premium video publisher lens.



JANUARY

INDUSTRY COLLABORATION

The year starts strong with the goal of industry collaboration and planning for the year. **Enabling addressability** is on the minds of premium video buyers and sellers alike as the need to reach audiences at scale in a unified fashion is a top priority in the space.



FEBRUARY

SUPER BOWL LIV

Brands unveil new campaigns and creatives ahead of and during Super Bowl LIV, which scored its first ratings increase in five years.

OSCARS SLUMP

The 92nd Academy awards averaged 23.6 million viewers according to Nielsen, making this year the least-watched ceremony in TV history.



MARCH

GLOBAL PANDEMIC

The World Health Organization (WHO) officially declares the coronavirus (COVID-19) outbreak a global pandemic on March 11. As the pandemic strikes on a global scale, countries across the world are brought to a halt with most of the world population under lockdown. The economies slump and we experience one of the worse economic crises of all time.

TOKYO 2020 OLYMPICS POSTPONED

The International Olympic Committee postpones the Summer Games in Tokyo to 2021, uprooting brand activations and plans.



APRIL

HIGHEST TV VIEWING RECORDED

In the first half of 2020, **premium video views** increase 17% year-over-year (YOY) and premium video ad views increase by 32% in the U.S.¹

Meanwhile, Europe sees a significant increase in TV viewership as well. Average daily viewing per household reaches 6 hours and 25 minutes, up 90 minutes per day on average.²



MAY

OPTIMISM FOR FOOD & TRAVEL

FreeWheel conducts a **survey** among media agencies, DSPs and direct advertisers in the UK, France and Germany. The findings indicate 84% of respondents believe the food industry will resume media investments and 49% feel the travel industry is likely to resume in the months ahead as well.³



JUNE

SPORTS START / RESTART

Following the ongoing lack of clarity around arguably the most important offering on live linear TV, sporting events begin to return to stadiums and screens. Soccer across many European countries resumes including UK's Premier League. The return of sports in the U.S. drew a large **increase in TV viewership**, specifically for Major League Baseball (MLB), the National Hockey League (NHL) and the National Basketball Association (NBA).



JULY

BLACK LIVES MATTER

Acts of violence against the Black community and structural racism in the U.S. fuel widespread protests and civil unrest. Black Lives Matter gains global attention and becomes a symbol of advocacy against police brutality and racially motivated violence. Publishers, agencies and media companies are paying attention, **having important conversations** and leaning in to be part of the change.



AUGUST

PEACOCK LAUNCH

NBCUniversal's ad-supported streaming platform, Peacock launches with nearly 22 million users signed up by launch day.



SEPTEMBER

A DIFFERENT UPFRONT

The pressure on TV advertising resulting from the COVID-19 pandemic surmounted at the smaller-than-normal and delayed upfront. Uncertainty of TV schedules and advertiser budgets lead to advertisers buying closer to program airings. Many advertisers wait to see what happens with the Fall TV season.

Marc Pritchard, CBO at P&G confirms the company will work outside of the upfront to negotiate directly with the networks.



OCTOBER

MORE SPORTS RESUME

Just off the back of September's French Tennis Open where Roland-Garros took place sans crowd, as well as the cycling Tour de France, Rugby 6-nations championship—which originally debuted in February and halted in March—resumes and finishes at the end of October.

OPTIMISM ABOUND

As U.S. and European governments eased restrictions around the summer and allowed governments at the smaller-than-normal and delayed upfront, activities re-ignite with precautions and several more sports leagues resume/restart. The medias start to bounce back, with advertisers keen to return and re-engage with their audiences.



NOVEMBER

ALL EYES ON THE U.S. ELECTION

A generation-defining election keeps political media buyers busy. From new campaigning tactics to different voting processes, COVID-19 changed virtually every aspect of the 2020 races.



DECEMBER

RESURGENCE

As the world braces for a COVID-19 resurgence and impending lockdowns, the publisher community takes learnings born in an unprecedented time to task, developing strategies with an uncertain future in mind.

There are signs of optimism and hope for 2021, a FreeWheel **survey of 500 European Marketers** reveals that when it comes to advanced TV budgets, 84% expect spend to grow in the next 12 months.⁴

Sources:

- FreeWheel Video Marketplace report, 1H 2020
- Ofcom Media Nations 2020 UK Report
- FreeWheel UK survey (Germany and France) between 10 June 2020 and 22 June 2020
- FreeWheel survey of 500 EU Advertisers and Agencies by Colab, 19th Set to 5 October 2020