



# 2021 Market Report and 2022 Outlook

End-of-year survey featuring insights on advertising trends that will impact the coming year, with data gathered from 250+ leaders at agencies, media providers, and tech companies.

**TechValidate**  
by SurveyMonkey

# Executive summary

2021 brought an acceleration in media fragmentation, as long-standing tools for audience identification crumbled and consumers migrated en masse to cross-platform TV viewing. These developments have complicated marketers' ability to respond to consumer behaviors across platforms.

At the same time, the year saw some strong progress against these same challenges – in the form of new technologies, emerging standards, and integrated planning approaches. These green shoots will enable more unified campaign execution heading into 2022.

Changes in media consumption and the need for omnichannel solutions are front and center in this report. When we asked advertisers, agencies, and media companies

about their biggest areas of concern in the marketing landscape, the leading responses by a large margin focused on the growing challenge of cross-platform measurement. Forty-six percent cited “poor ability to manage reach and frequency across CTV and digital channels,” while 43% cited a decline in their ability to measure campaign effectiveness across app- and browser-based media environments.

Respondents view the current dynamic as fraught with risk for marketers and believe the industry may be in for a messy transition as it searches for a new standard for measuring audiences in disconnected environments.

“There will be significant fragmentation with competing approaches in the marketplace prior to a winning and widely adopted

technology,” said one agency executive. “Placing bets on a solution could have a high enterprise cost.”

The good news is that many advertisers appear optimistic that progress has been made on the cross-platform audience measurement challenge, and that 2022 will bring more advances.

Sixty-one percent of respondents said they were “confident” or “somewhat confident” about the viability of emerging cookieless identity solutions. Furthermore, when asked which marketing technology innovations will have the biggest impact on their advertising in 2022, the top response was “improvements in integrated media planning and execution.” The second most popular response was “measurement improvements centered on non-cookie methods.”

But cross-channel identity resolution isn't the only thing on the industry's collective mind. This report also highlights industry expectations for the year ahead across a number of key areas, including CTV, privacy compliance, and brand safety/fraud.

Overall, the results reflects a reality where marketers are confronting the omnichannel challenge with a new sense of urgency.

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## Omnichannel measurement is a growing obsession

Across the board, our survey respondents indicate that they view innovations in omnichannel advertising and measurement as the single biggest opportunity for the marketing industry.

Specifically, when we posed the question, “Which marketing technology innovation do you believe will be most impactful for your advertising in 2022?” more respondents cited “improvements in integrated media planning and execution” (60%) than any other innovation.

The second and third most common responses to this question also touched on the need to improve measurement across channels and media properties. Fifty-seven percent of respondents cited “measurement improvements centered on non-cookie methods,” and 45% cited “Converged TV measurement/planning.” (Read more on CTV later in this report.)

Survey participants’ write-in responses further emphasized the need for a unified view of the fragmented marketing ecosystem. When presented with the question, “What is the most important issue to your marketing team that the industry seems to be ignoring?”, many respondents held forth on the omnichannel theme.

“Viable, reliable, industry-accepted cross-channel audience measurement,” wrote one agency planning director. Another respondent said, “Being able to scale campaigns, and align across all channels.” And a third agency project manager focused on a “holistic picture of the marketing landscape and how all of it is connected.”



### Which marketing technology innovation do you believe will be most impactful for your advertising in 2022?

| Choice  | Responses | Percentage |
|---|-----------|------------|
| Improvements in integrated media planning and execution   | 151       | 60%        |
| Measurement improvements centered on non-cookie methods (e.g. panels, media mix modeling, federated learning methods, better use of first-party data) | 143       | 57%        |
| Contextual targeting improvements   | 78        | 31%        |
| Better infrastructure and processes for first-party data management   | 71        | 28%        |
| Artificial Intelligence (AI) and Machine Learning (ML)  | 69        | 28%        |
| Converged TV measurement / planning   | 113       | 45%        |
| Improved ad opportunities in emerging channels (e.g. immersive games, influenceconomy, Tiktok, VR/AR)   | 94        | 38%        |

## Insight #2

# Progress is being made on identity resolution

No surprise here—Advertisers are very focused on what replaces the withering identifiers that have powered programmatic advertising for much of the last ten years.

When asked, “What are your largest areas of concern in your media and marketing initiatives?”, 45% of respondents cited a “Decline in ability to measure campaign effectiveness on tech platforms and open web” and an almost equal number cited “Poor ability to manage reach and frequency across CTV and digital channels.” Somewhat fewer (35%) cited cookies directly. The overall direction of these responses is clear: Respondents are highly focused on the challenge of identifying users across media environments.

Write-in responses reflected the urgency of this challenge, citing the need to conduct “media measurement without cookies” and to “leverage first-party data once we can no longer rely on cookies,” among several other cookie-specific comments.

But while respondents expressed a high level of concern about the fall of cookies and other identifiers, they also appear optimistic about the efforts currently underway to sustain addressable advertising in a more privacy-centric internet.

We asked survey takers, “What is your level of confidence in the viability of emerging cookieless identity solutions?” Fully 61% said they were “confident” or “somewhat confident,” while just 31% said they were “not confident” or “rather concerned.” Just 8% said they had “no idea what’s going on,” indicating very high industry awareness on the issue.



## What are your largest areas of concern in your media and marketing initiatives?

| Choice  | Responses | Percentage |
|---|-----------|------------|
| Decline in ability to measure campaign effectiveness on tech platforms and open web | 111       | 45%        |
| Poor ability to manage reach & frequency across CTV and digital channels            | 110       | 44%        |
| Talent retention / access to expertise  | 90        | 36%        |
| Lack of preparedness for cookieless future  | 88        | 35%        |
| Loss of access to third-party data  | 85        | 34%        |
| Consumer ad avoidance / ad blindness  | 81        | 33%        |
| Other   | 7         | 3%         |

## Insight #3

### We're at the tipping point for CTV

While survey responses primarily focused on the opportunity to do more holistic measurement in a fragmented landscape, a key secondary theme emerged around how to grapple with the explosive growth in CTV viewing.

More than 70% of survey-takers said they plan to increase their CTV advertising investment in 2022. Breaking this group down further, we see that 51% plan to grow their spend incrementally (increasing by 20% or less), 18% will grow their spend significantly (increasing by 21-50%) and 3% will grow their spend dramatically (increasing by 51% or more). Another 24% said they plan to maintain their existing level of investment, leaving just 4% who plan to spend less.

### Will you spend more, less, or the same in 2022 on Connected TV (CTV) advertising?

| Choice   | Responses | Percentage |
|--|-----------|------------|
| Our investment will grow incrementally (1-20%)   | 123       | 51%        |
| Our investment will remain the same, owing to inventory shortages and other challenges | 58        | 24%        |
| Our investment will grow significantly (21-50%)  | 43        | 18%        |
| Our investment will shrink, owing to inventory availability and other challenges       | 10        | 4%         |
| Investment will grow dramatically (51%)  | 8         | 3%         |

**More than 70% of survey-takers said they plan to increase their CTV advertising investment in 2022.**

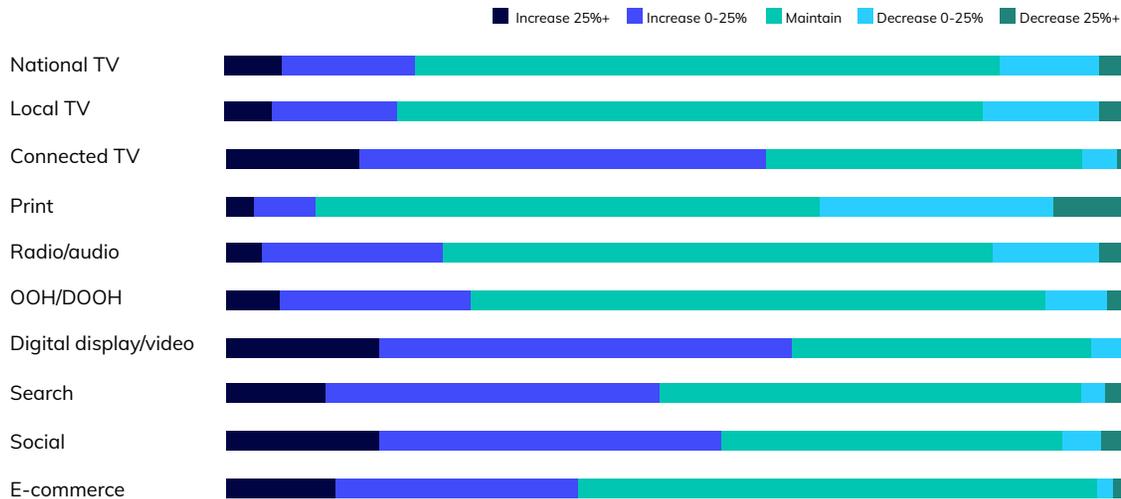


Yet even as CTV approaches a tipping point, it's important to note that the marked increase in spending on streaming channels will not come at a direct cost to traditional TV budgets. When asked about their planned 2022 investments in national and linear TV, large majorities indicated they would either maintain or increase spend.

This can be seen clearly in the chart below, which illustrates spending behaviors across 10 channels. Examining the legacy TV channels (local and national), one can see that approximately equal numbers of respondents plan to increase and decrease their investments in the two channels. This basically amounts to a holding pattern for traditional TV investments.

Meanwhile, the acceleration of “CTV” and “Digital display/video” channels will surpass any other channel.

### For each media channel, will you be increasing, decreasing, or maintaining your spend in 2022?



With the flood of dollars to CTV, a range of intermediaries are scrambling to secure media supply to meet the demand. As we've seen before, increasing supply chain complexity comes with a corollary risk that fraudulent, invalid or non-suitable ad placements will find their way onto media plans.

When we asked about this concern specifically, a striking 81% said they were either “somewhat concerned” or “very concerned” about this scenario. Only 19% said they were “not at all concerned.”

### How concerned are you about ad fraud and viewability on CTV?

| Choice               | Responses | Percentage |
|----------------------|-----------|------------|
| Somewhat concerned   | 129       | 57%        |
| Very concerned       | 54        | 24%        |
| Not at all concerned | 43        | 19%        |

## Brand suitability remains a priority

Indeed, brand safety and fraud measurement remain a significant focus for buyers as we head into a new election cycle during a period in history when our national politics remain highly divisive.

“Brand safety in 2022 might be challenged across TV, streaming, social and digital due to the political primary dynamic as many sides will be voicing opinions in many venues, inevitably leading to more fake news and misinformation,” said Hugh Scallon, a consultant with 5-Star Marketing Advisors. “Brands will have to choose to stay, flee or navigate the situation ... [It’s] clear that news and social media environments will be possible hot spots on many issues.”

That’s not to overstate marketers’ concerns. Fully 57% of respondents expect their concerns around brand safety and suitability will “stay the same” in 2022, relative to 2021. But among those who expect a change, 39% expect those concerns will increase whereas only 4% think they will decrease.

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### Do you expect your concerns around brand safety and suitability of ad placements will increase, decrease, or stay about the same in 2022?

| Choice        | Responses | Percentage |
|---------------|-----------|------------|
| Stay the same | 131       | 57%        |
| Increase      | 88        | 39%        |
| Decrease      | 9         | 4%         |

# Conclusion

As we turn the page on 2021, the industry's collective focus has swung decisively toward the challenge posed by audience fragmentation. We are not talking only about advertising across digital media properties in the programmatic sphere, but also increasingly to omnichannel environments – linear TV, national TV, CTV, digital out of home, and so on.

The decline of cookies and other identifiers is one big reason for this shift. Another is a swerve in consumer behavior that has fractured media impressions across a growing number of apps and modalities.

Marketers, their agencies, and technology partners are already making progress on unified solutions, as our 2022 study makes clear. But much of the integration work lies ahead, and 2022 will be a key year for progress on this opportunity.

# Methodology

This survey was conducted via TechValidate in November 2021 and contains data from 259 global respondents representing brands, agencies, media companies, measurement firms, tech platforms, and other marketing industry constituents.

## About Mediaocean

Mediaocean is the mission-critical platform for omnichannel advertising. With \$200 billion in annual media spend managed through its software, Mediaocean connects brands, agencies, media, technology, and data. Using AI and machine learning technology to control marketing investments and optimize business outcomes, Mediaocean powers campaigns from planning, buying, and selling to analysis, invoices, and payments. Mediaocean employs 1,200 people across 20 global offices and is part of the Vista Equity Partners portfolio. Visit [mediaocean.com](https://mediaocean.com) for more information.

