



WEBINAR THURSDAY, APRIL 1, 2021 | 2 PM EASTERN



All Eyes on OTT - Breakout Media Category in 2021

Welcome Everyone!

Today's agenda

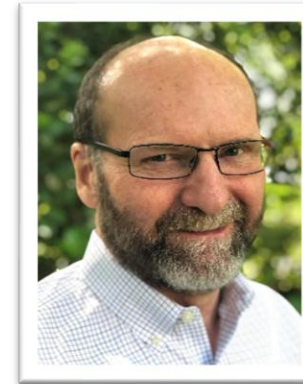
- **We'll talk through these topics:**

- BIA's 2021 local advertising forecast estimates for OTT
- Connected devices
- Broadcast groups and their OTT plays
- Measurement and attribution
- Adtech workflow and programmatic trading

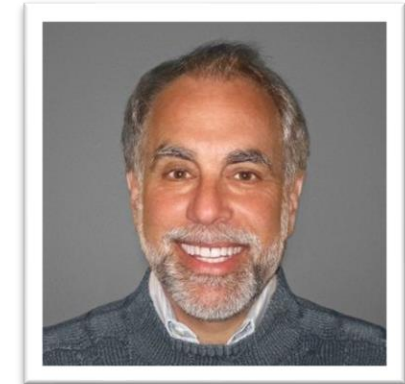
- **We'll explain how BIA can help you:**

- OTT Forecasts
- CI and Strategic Consulting
- BIA ADVantage local market advertising estimates

Webinar hosts:



Rick Ducey
Managing Director, BIA
Advisory Services



Mitch Oscar
Director of Advanced TV
USIM

Snapshot of BIA & Our OTT Coverage

BIA is the leading data, insights and analytics firm for broadcasting, digital and publishing companies and industry associations.

We combine **data** with **local media expertise** to provide actionable information businesses need to make grounded financial and strategic decisions.

We have analyzed the media and technology landscape for over 37 years, conducting more than 5,000 engagements for the leading (and startup) media firms in the country.



Over-the-Top (OTT) Analysis & Data



Leading Local Insights

Where BIA Brings Industry Insights to You



Podcast: OTT in the Local Media Ecosystem

<http://bit.ly/OTTPodcast-March21>

2021 Local Digital Event Series: OTT

<http://bit.ly/DigitalSeries-OTT>

Local Market OTT Estimates

Available in our data platform or by special order (*offer at end of presentation*).

How BIA Views “Local” and OTT

BIA’s Local Definition:



- **Local:** Includes all media generating revenue by selling access to local audiences to all types of advertisers.
- “Local” audience advertising sales include buys specifying local and regional markets.

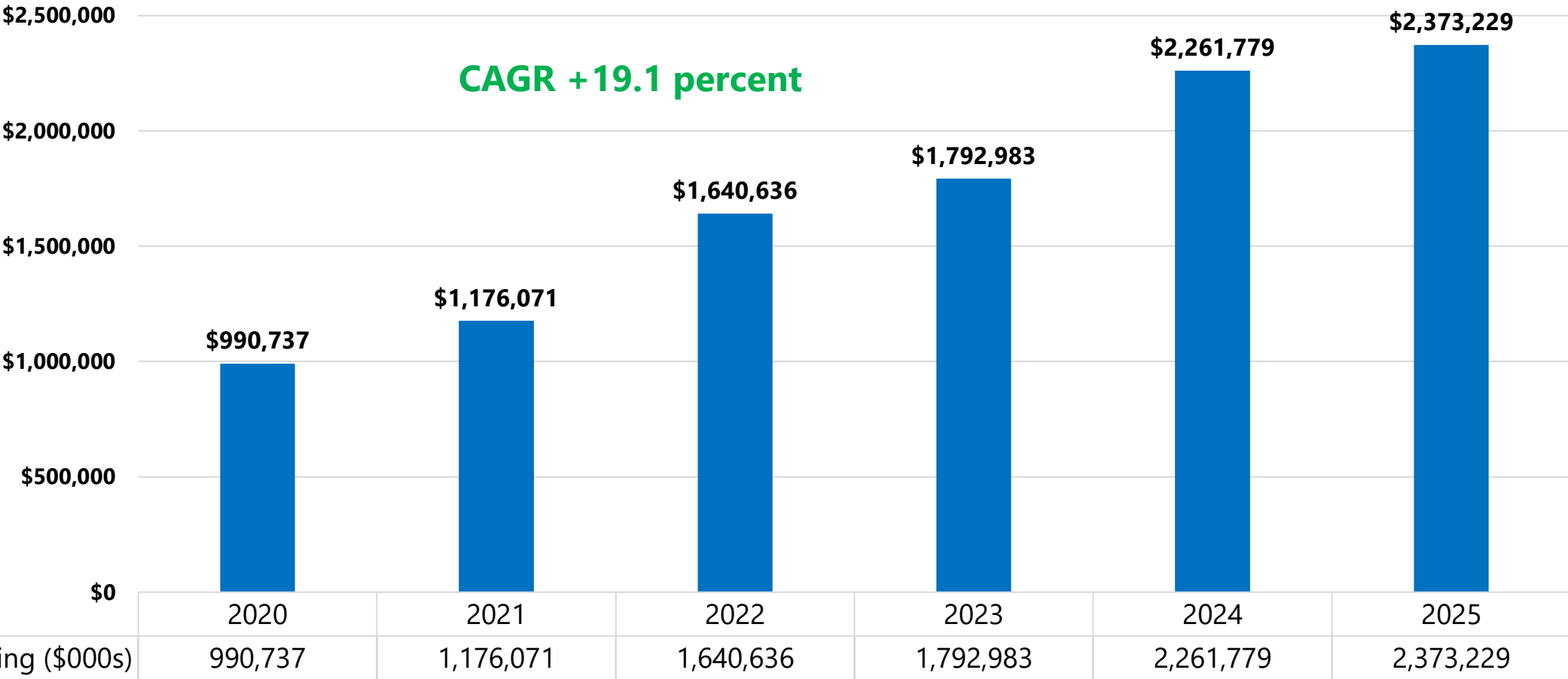
BIA’s OTT Definition:



- **Over-the-Top (OTT):** OTT refers to long-form, premium video that can be watched on any Internet connected screen including smartphones, tablets, desktops/laptops, and of course connected TV sets (CTV).
- Revenue is all locally targeted advertising revenue sold on streaming video that is delivered to TV sets via Internet connections.

BIA's OTT Local Ad Spending Forecast

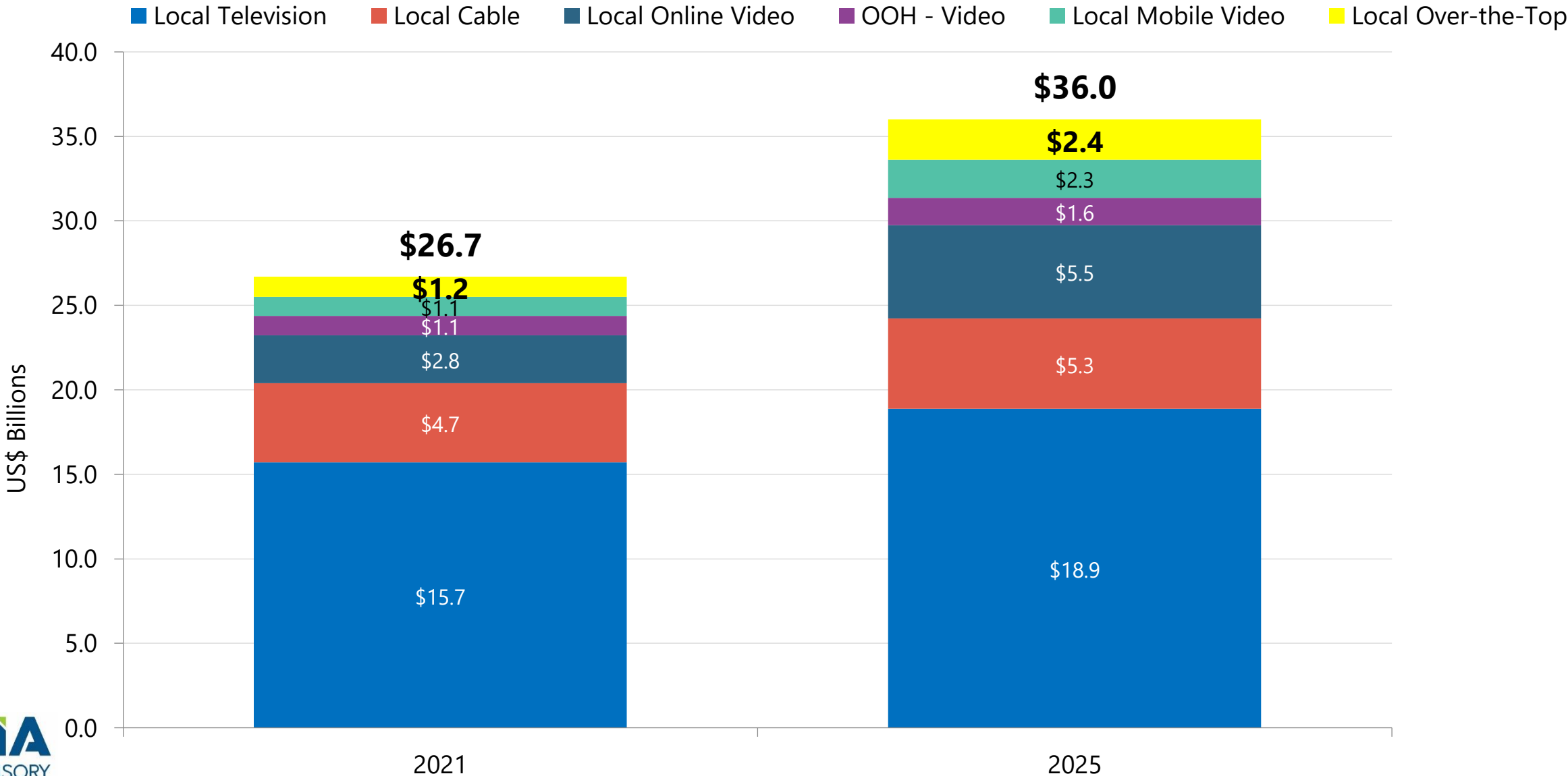
Most viewing and ad-spending will be on CTV segment of the OTT space



Note: BIA's estimate covers for locally targeted OTT advertising.

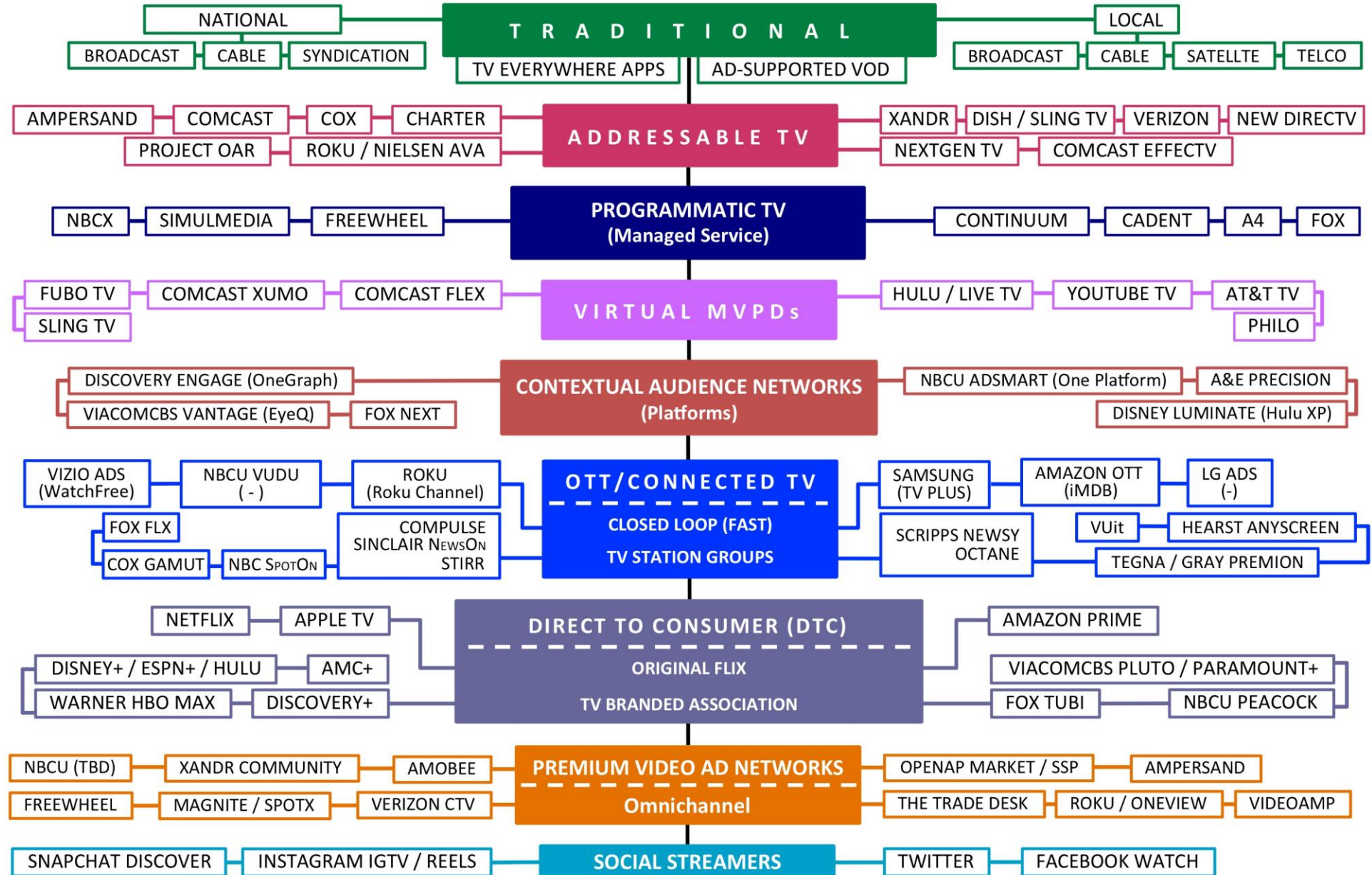
Source: BIA Advisory Services, December 2020

OTT Ad Spend Slice within the Local Video Advertising



THE TELEVISUAL TERRAIN

April 2021



Let's Meet Our Expert Panel

Bringing together perspectives from media, agency, measurement executives



Lorne Brown
CEO
Operative



Justin Fromm
EVP Business Intelligence
Advertiser Perceptions



Adam Helfgott
CEO
MadHive



Brian Hunt
Head of OTT/CTV Advertising Sales
Sinclair Broadcast Group



Jo Kinsella
President
TVSquared



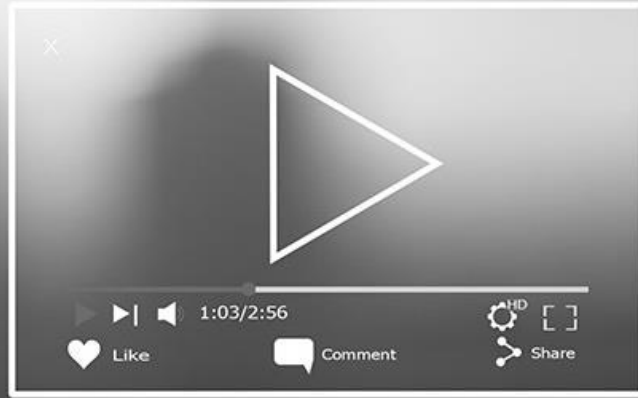
Brian Page
Managing Director - Scripps Octane OTT
E.W. Scripps Company



Bryon Schafer
SVP of Research
Vevo



Chris Wilson
Chief Commercial Officer
Comscore



VIDEO ADVERTISING CONVERGENCE REPORT



Have Confidence in Every
Business Decision You Make

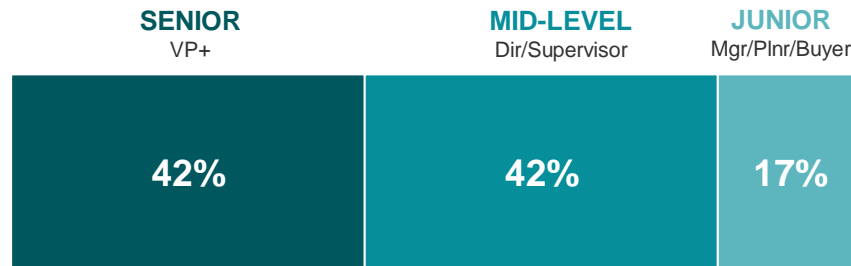
Methodology and Respondent Profile

Only Advertiser Perceptions talks to people who are actively making decisions about media brand selection

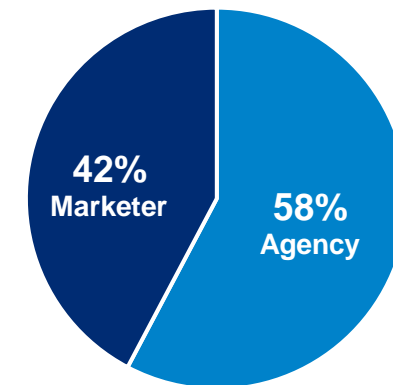


- **Sample:** Marketer and Agency contacts from The Advertiser Perceptions Media Decision Maker Database and third-party databases as needed.
- **Qualification:** 100% involved in Video advertising decision-making.
- \$1MM+ in Annual Ad Spend (Mean Annual Ad Spend: \$171M)
- Incentives include cash and information

RANGING IN TITLE:



EXPRESSING OPINIONS FROM:



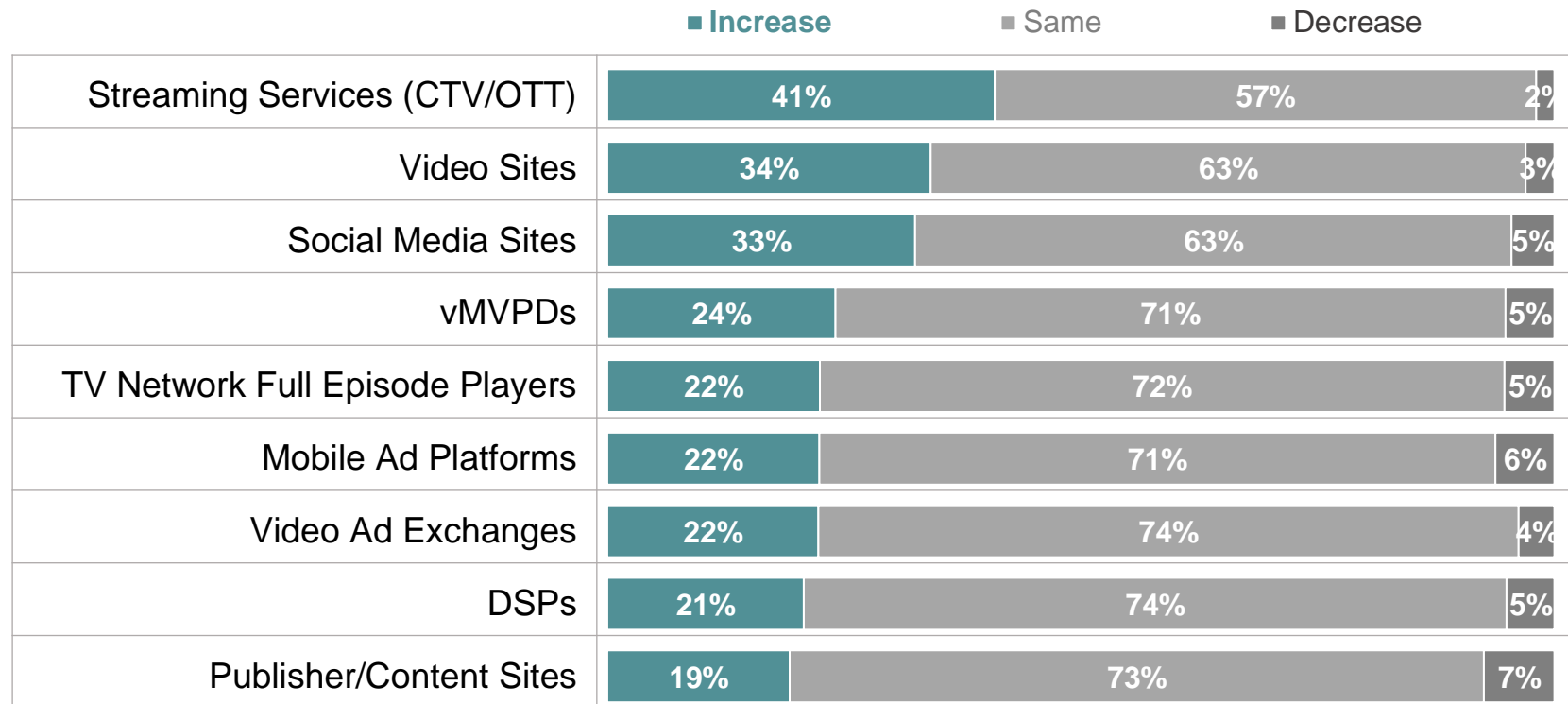
VIDEO IS THE MOST IMPORTANT MEDIA TYPE FOR ACCOMPLISHING GOALS/KPIS

Summary of Respondents Ranking Media Type #1

1	Video (any type: linear TV, digital video, OTT, OOH)	49%
2	Search	19%
3	Social	13%
4	Display	12%
5	Audio (any type: terrestrial radio, digital audio)	4%
6	Print	2%
7	OOH (billboards, buses)	2%

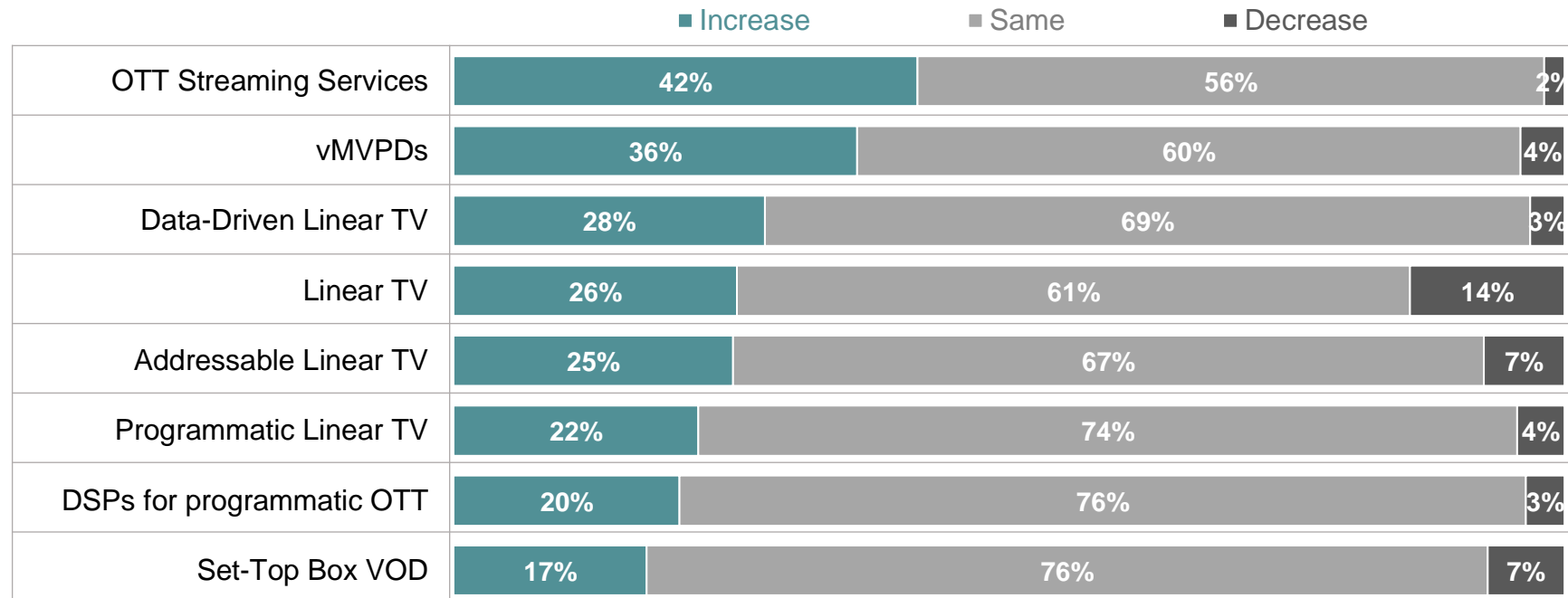
Digital Video Tactics: Advertisers Indicate Greatest Spend Optimism for Streaming, Video Sites, and Social

Change in Video Ad Spend Next 12 Months by Tactic



TV Tactics: Spend Optimism Is Highest For Tactics With Growing Scale

Change in TV Tactic Ad Spend Next 12 Months



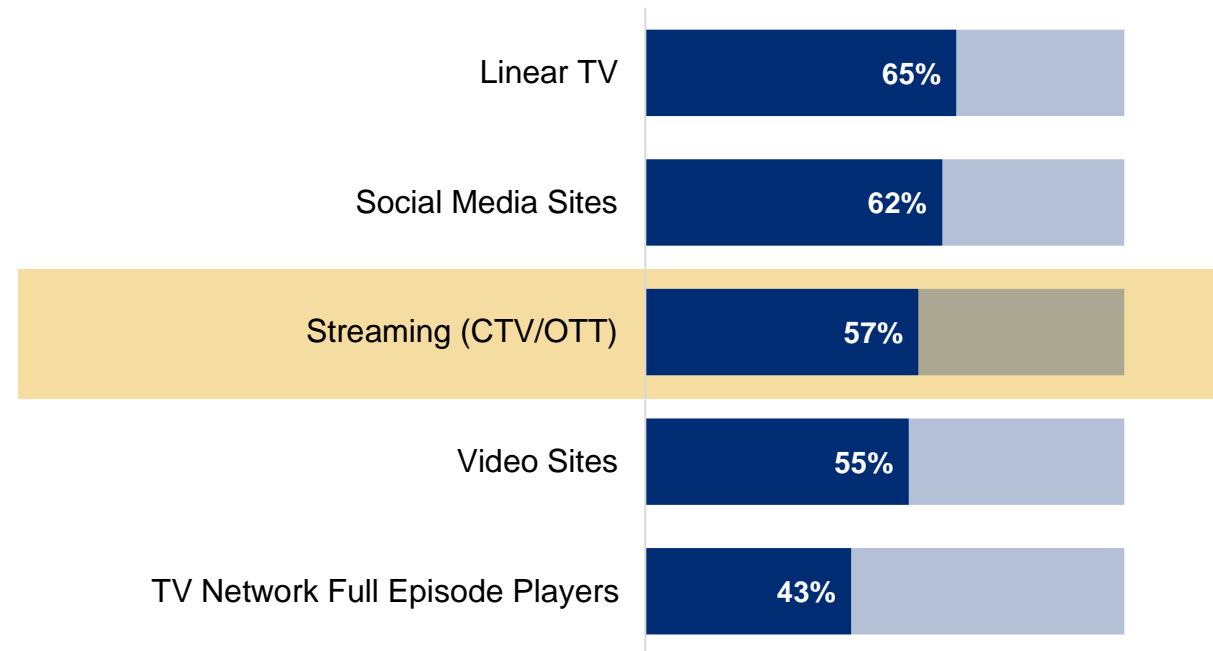
Audience-Based Buying Remains Less Common on TV

Frequency of Buying Against Specific Audience Targets vs. Age/Gender Demos

	All or Most of the time	Half of the time	Less than half of the time or Never
Social Media Sites	75%	20%	5%
DSPs for online/mobile video	65%	30%	5%
Streaming (CTV/OTT)	60%	35%	5%
vMVPDs	55%	35%	10%
Video Sites	50%	40%	10%
DSPs for programmatic OTT	50%	40%	10%
Publisher/Content Sites	45%	45%	10%
Linear TV	35%	45%	20%

Streaming Is A Top-5 Video Tactic for nearly 60% of Video Advertisers

Ranking All Video Advertising Tactics Used
Summary of Respondents Ranking 1-5



Q. Thinking about all the video advertising tactics your [company/main client] will be using over the next 12 months, please rank these tactics based on how valuable they are to your [company's/main client's] video advertising efforts. Base: Respondents Spending \$1M+ Annually on Video, Using 'Tactic' Next 12 months (Variable base)

As Audiences Splinter Across New Viewing Opportunities, Reach Has Become A Top Priority

Most Important Factors when selecting Streaming (OTT/CTV) Advertising partner
Summary of Respondents Ranking 1-3

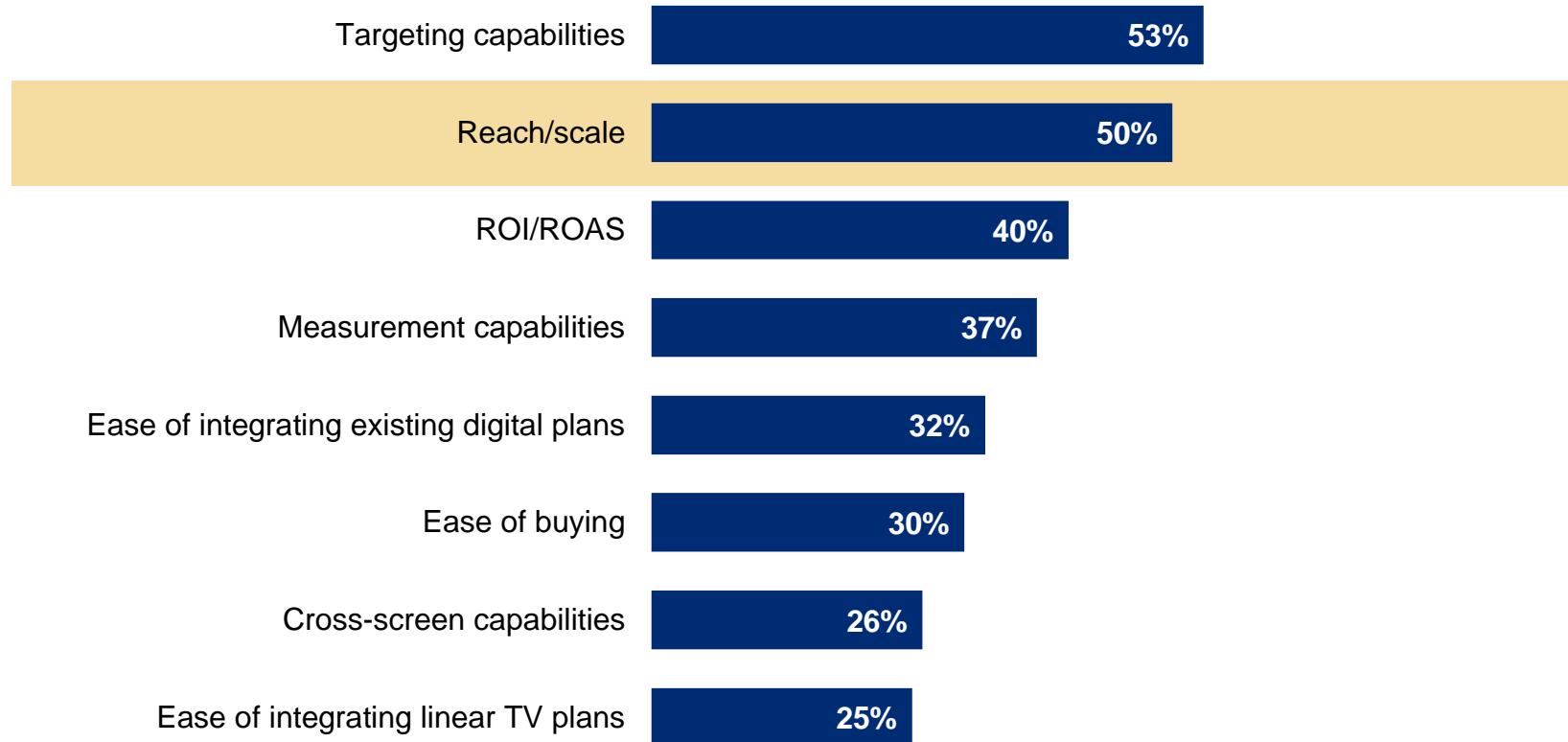


Q. What factors are most important when considering which media company/TV network to partner with for OTT/Connected TV video advertising?
Base: Respondents Spending \$1M+ Annually on Video, Using CTV/OTT

Reach Is A Top Criterion In Programmatic CTV As Well

Top Criteria for selecting a DSP for CTV/OTT Advertising

Rank 1-3

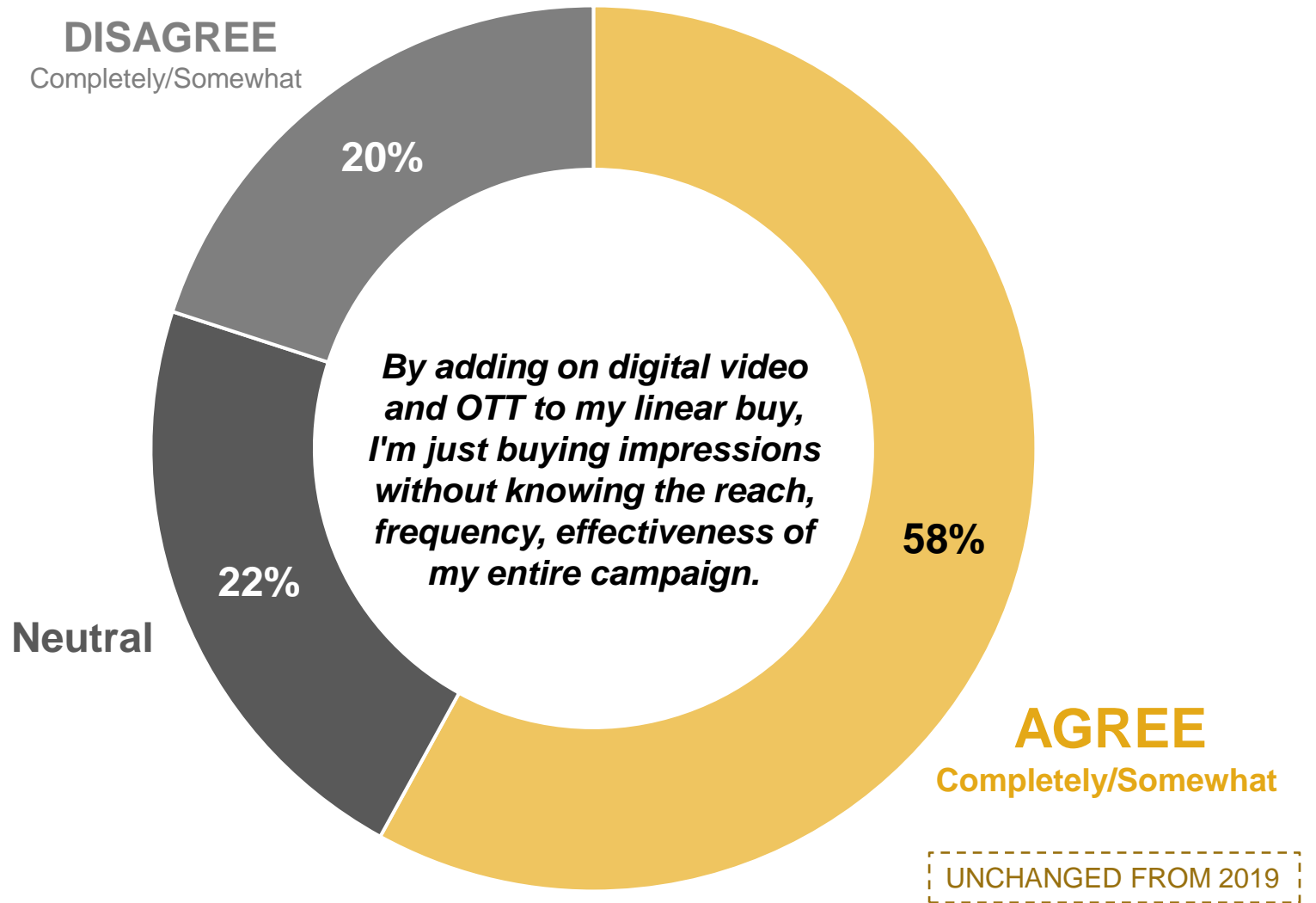


Source: Programmatic Intelligence Report, Demand Side Platforms, Q2 2020

Q: What are three most important criteria you consider when selecting a DSP for Connected TV/OTT advertising?

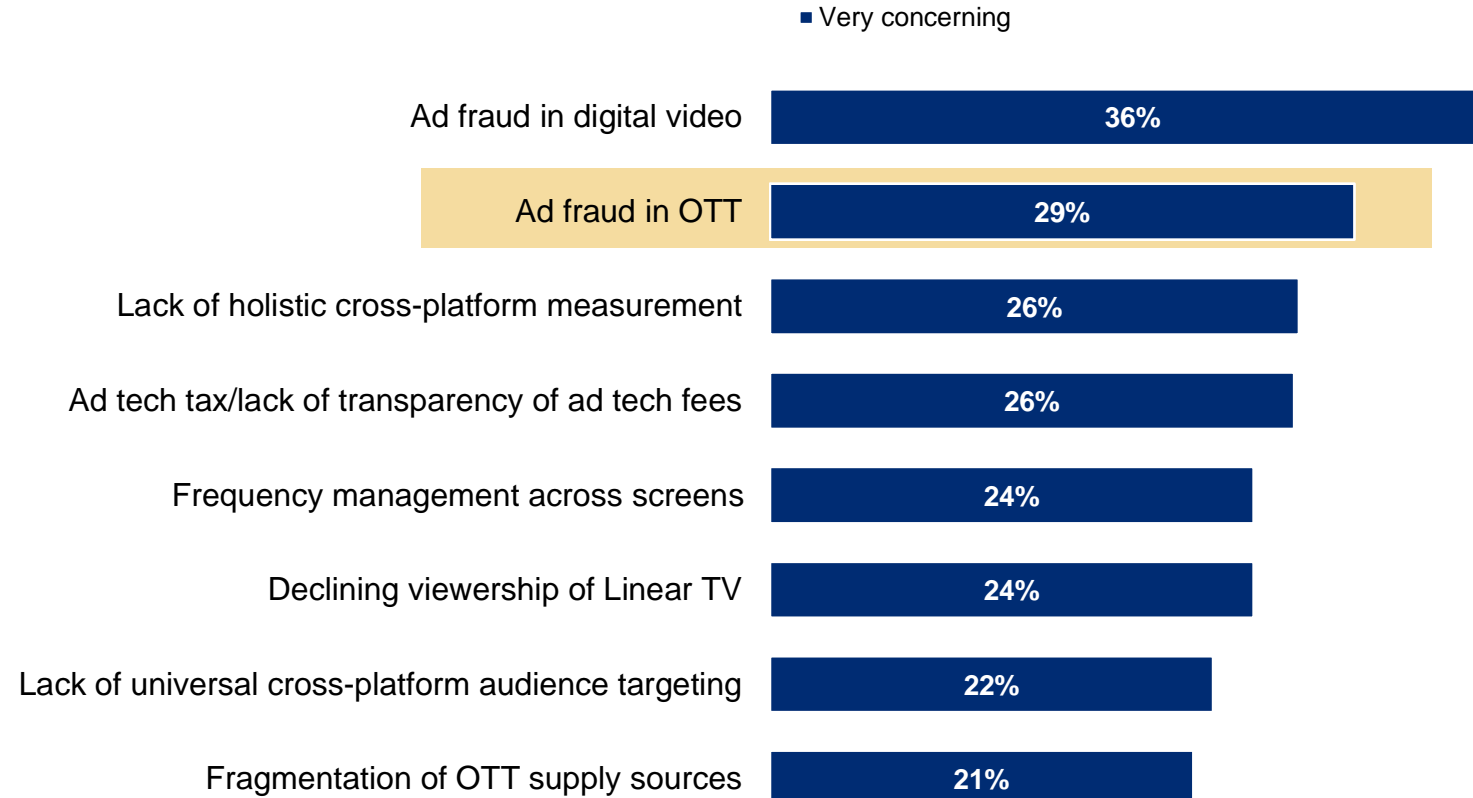
Base: Use/Plan to Use a DSP for CTV/OTT Advertising

**YET CHALLENGES REMAIN:
CROSS-PLATFORM
REACH & FREQUENCY
KEY AMONG THEM**



Ad Fraud in Streaming is a Top Concern Across the Video Marketplace

Video Marketplace Concerns



Q. How much of a concern are each of the following to the overall video marketplace?
Base: Respondents Spending \$1M+ Annually on Video



THANK YOU

Justin Fromm

justin.fromm@advertiserperceptions.com

@jzfromm



**Have Confidence in Every
Business Decision You Make**

Let's Talk With Our Expert Panel



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Operative



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EVP Business Intelligence
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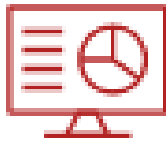
Chris Wilson
Chief Commercial Officer
Comscore



How BIA Can Help Services + Data

BIA Can Help You with OTT: Forecasts, CI & Consulting

BIA can help you keep up on the current and future trends in the local and national media ecosystem – especially around OTT.



Local Market Forecasts

Get access to BIA's quarterly OTT forecast for your local market(s). Track ad spend across 12 top verticals or 95 business categories.

(BIA ADVantage)

Learn more here:

<http://bit.ly/BIA-ADVantage>

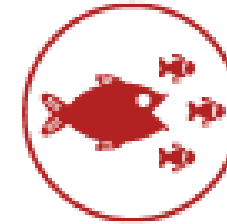


Virtual Briefings & Strategy Sessions

Custom briefings on trends and challenges.

On demand strategy sessions on new players and products.

(Strategic Consulting)



Competitive Tools

Competitor profiles, analysis and war cards that can cover verticals OTT, OTT platforms, addressability, cross platform measurement, technology and ad product messaging.

(Competitive Intelligence Service)

Special Offer: OTT Forecast Snapshot of Your Local Market



What does OTT look like in your local market? BIA's OTT Forecast can tell you.

- Get a snapshot of OTT spending your local market(s) with an OTT Forecast Snapshot.
- **The OTT Forecast Snapshot will include our 2021 estimates for the following:**
 - Total spend in a market
 - OTT spend across 95 business verticals

Cost: \$195 (format: Excel spreadsheet)

PURCHASE ONLINE

Questions? Email sales@bia.com.

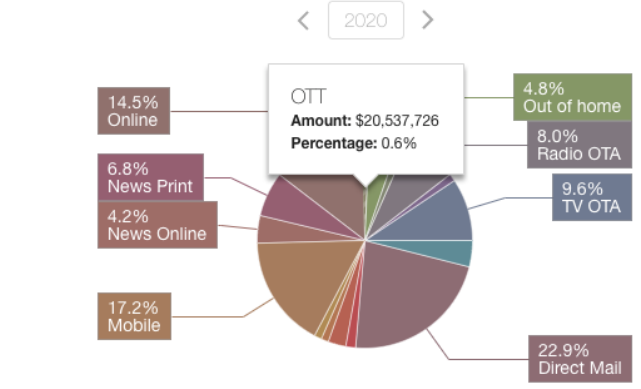
BIA ADVantage Clients: [Login to the platform](#) to view your local market estimates.

Order an OTT Forecast Snapshot for \$195

<http://bit.ly/LocalOTTForecast>

Want multiple markets?
Let us know, and we'll apply a volume discount. Email us at sales@bia.com

Media Ad Spending: \$3.4 Billion
TV Market: Washington, DC



View of OTT add spend within BIA ADVantage.

QUESTIONS ABOUT THE FORECAST?

**Get In
Touch With
Us**

Website

www.bia.com

Emails

advantage@bia.com

sales@bia.com

Daily Newsletter

<http://bit.ly/BIANewsletter>