



ADVISORY
SERVICES

OTT Ecosystem Players Discuss Market Directions

Oct 27, 2020



Meet Our Webinar Speakers

Moderators



Rick Ducey
Managing Director
BIA Advisory Services



Mitch Oscar
Advanced TV
USIM and BIA Advisor

Expert Panel



Justin Evans
Samsung
Global Head of Analytics &
Insights



Adam Gaynor
Vizio
VP, Network Partnership,
Head of Addressable



Brian Hunt
Sinclair Broadcasting
Head of OTT and
CTV



Jo Kinsella
TVSquared
President



Chris Wilson
Comscore
Chief Commercial Officer

Delivering Data & Services to the Media Industry for 37 Years



Quick Level Set on LOCAL OTT

Over-the-Top (OTT) promises the power of the TV set for advertising.

- As more viewers, and their media consumption migrate from linear TV, advertisers are becoming harder pressed to get the impressions they need for their video campaigns in premium content environments.
- Ad buyers are finding the combination of targetable impressions in OTT across platforms to be just what they're looking for to complement the reach they continue to get from broadcast local TV.
- From 2020-2021, BIA estimates the annual local ad spend growth will be 23% and over \$1.2 billion will be spent on local OTT advertising in 2021. *We'll compare this to the total spend during this discussion.*
- **During today's webinar discussion, we will assess the current state of the OTT marketplace and examine the priorities that will drive future success.**

BIA Local OTT Advertising Estimates

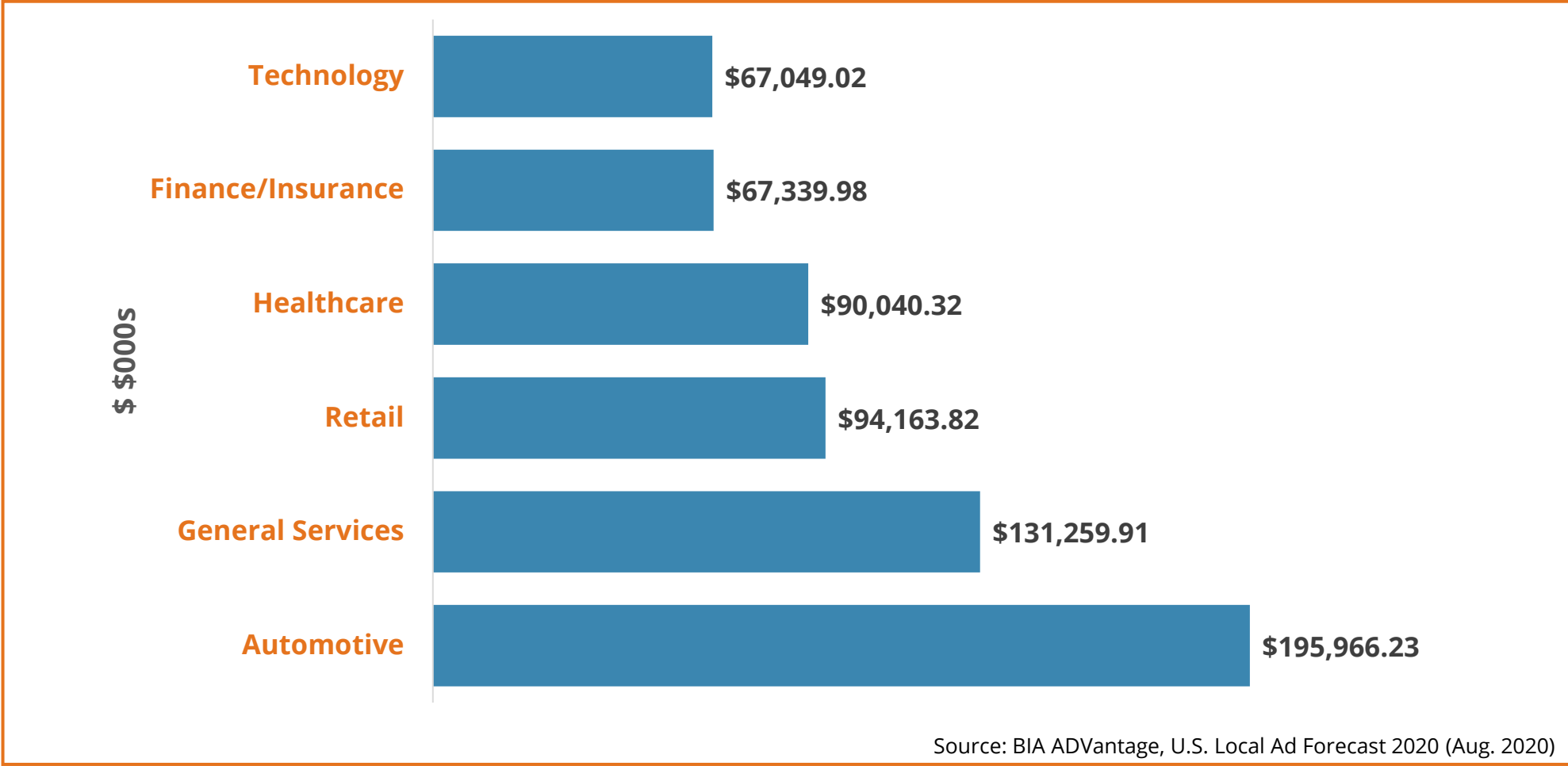
\$1.2B
2021 Projected Local Ad Spend

Comparison: Total Expenditures \$7B+

Annual Ad Spend Growth 2020-2021
23%

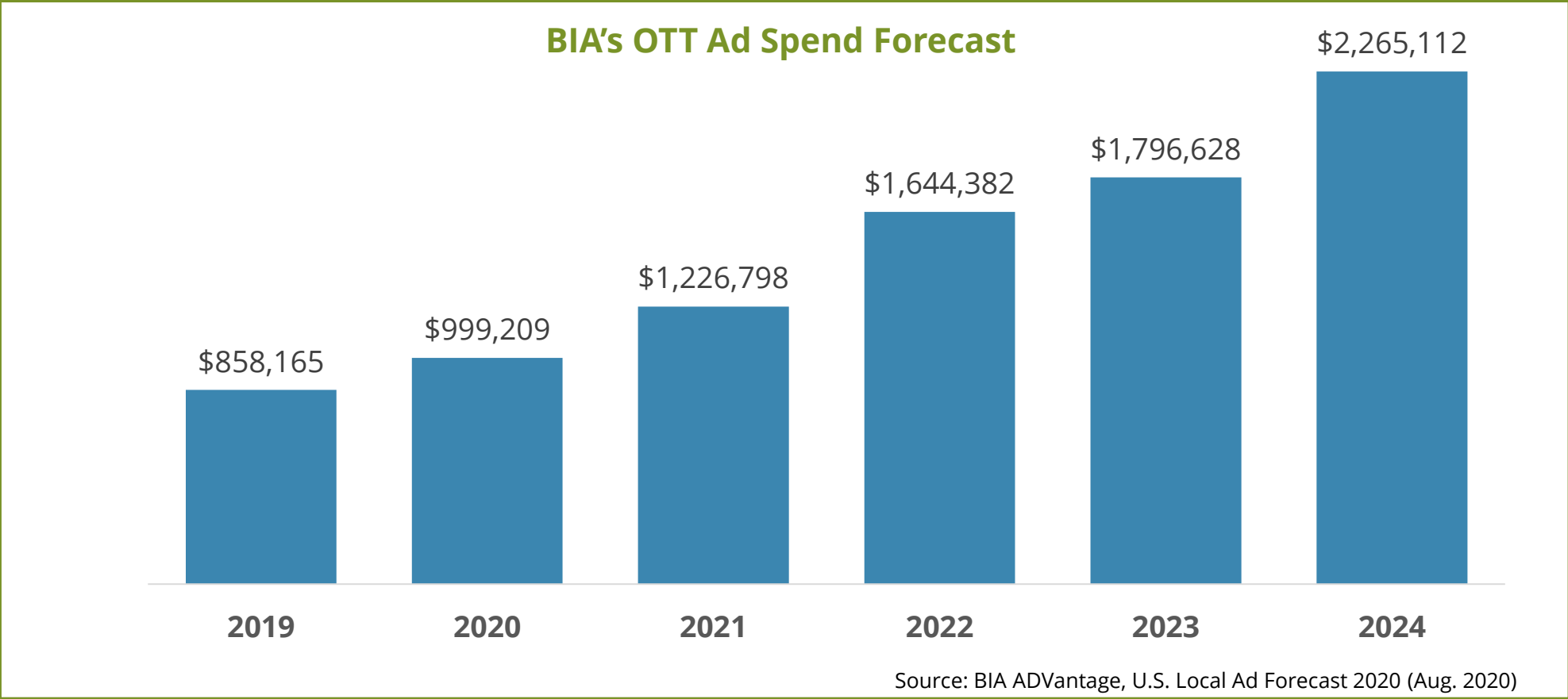
2020 OTT Spending in 6 Major Verticals

Automotive Tops List with Almost \$200M in 2020 OTT Spending in Local TV Markets



BIA's Local OTT Ad Spending Forecast 2019-2024 (\$000s)

OTT is Fast-Growing Local Ad Platform Leveraging Value of Linear and Digital Video



In addition to local, national advertisers spend will spend between \$5B-\$8B OTT in 2020.
(Source: Magna, Emarketer)

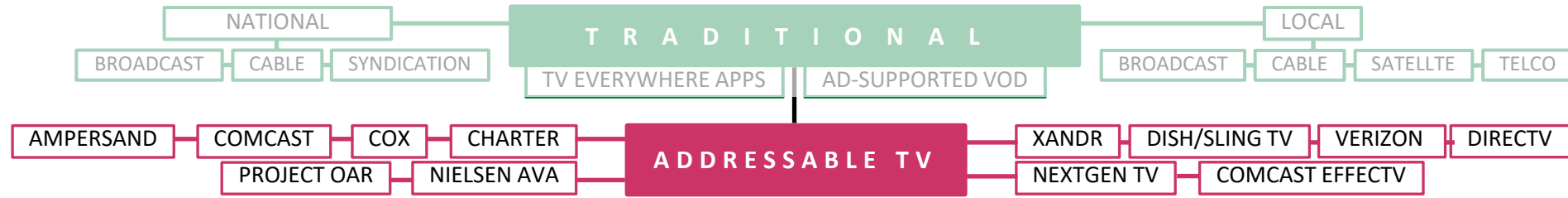
GOING OVER-THE-TOP

A 21ST CENTURY ADVANCED TV TRAJECTORY

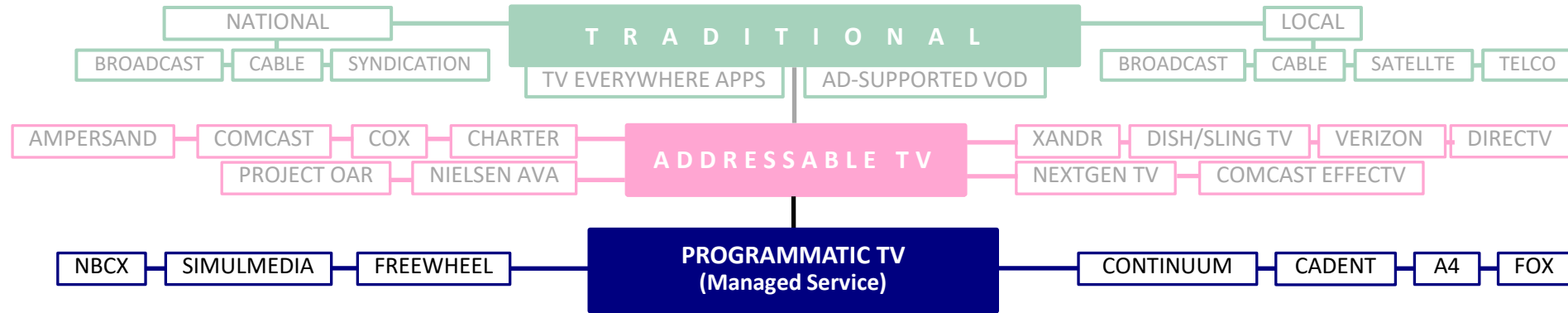
CIRCA 2010



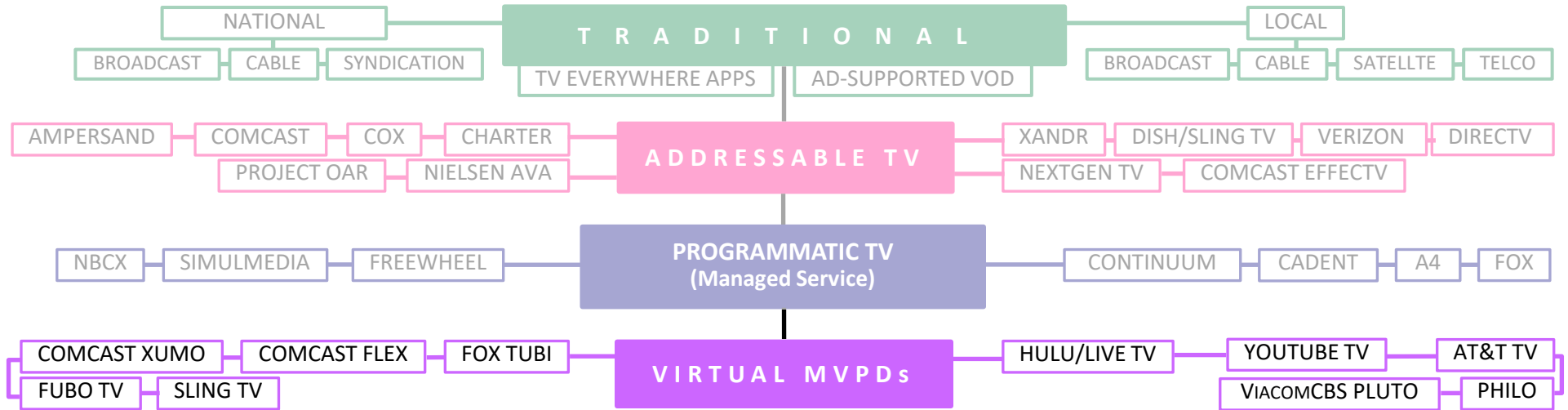
CIRCA 2012



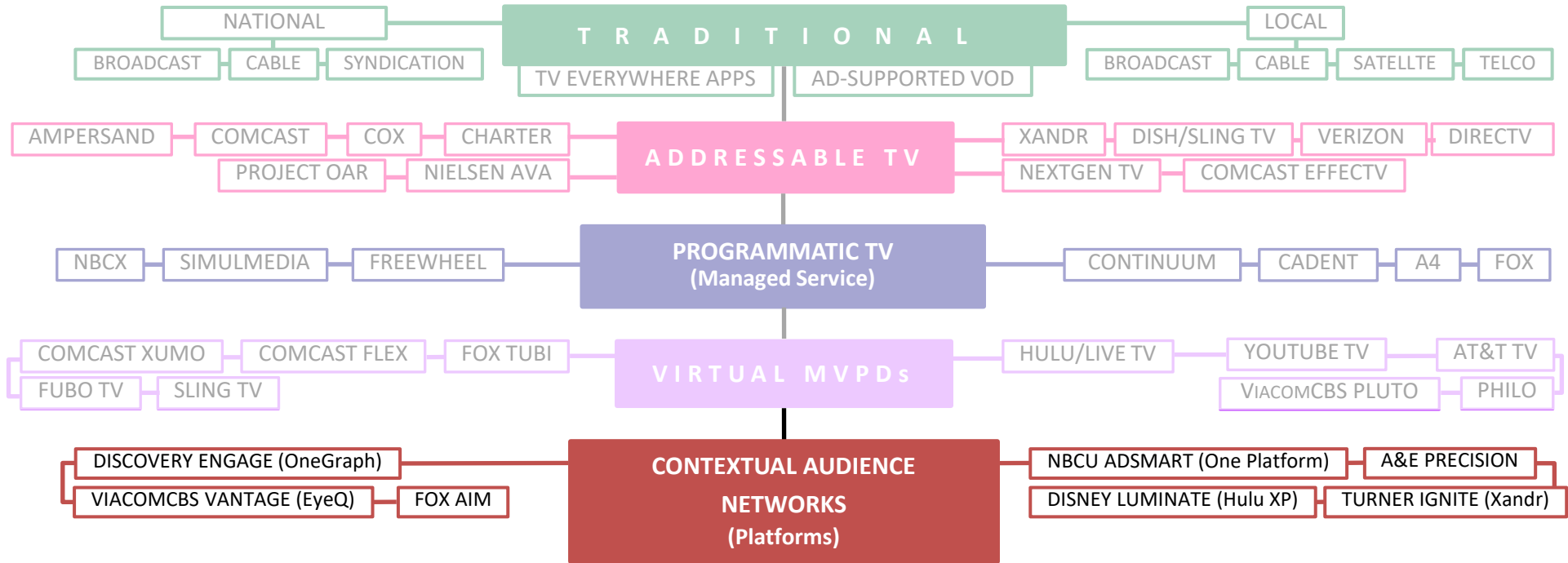
CIRCA 2013



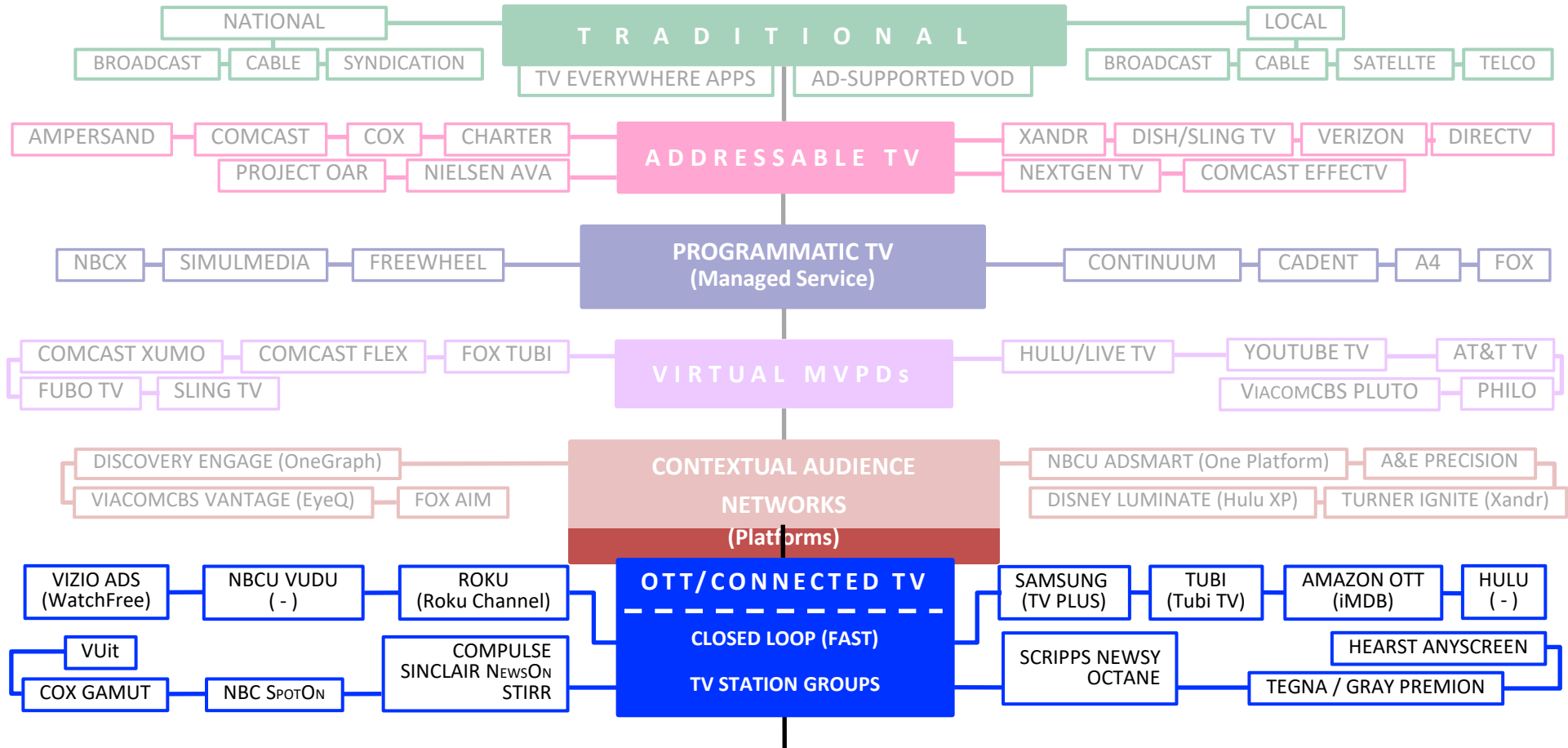
CIRCA 2015

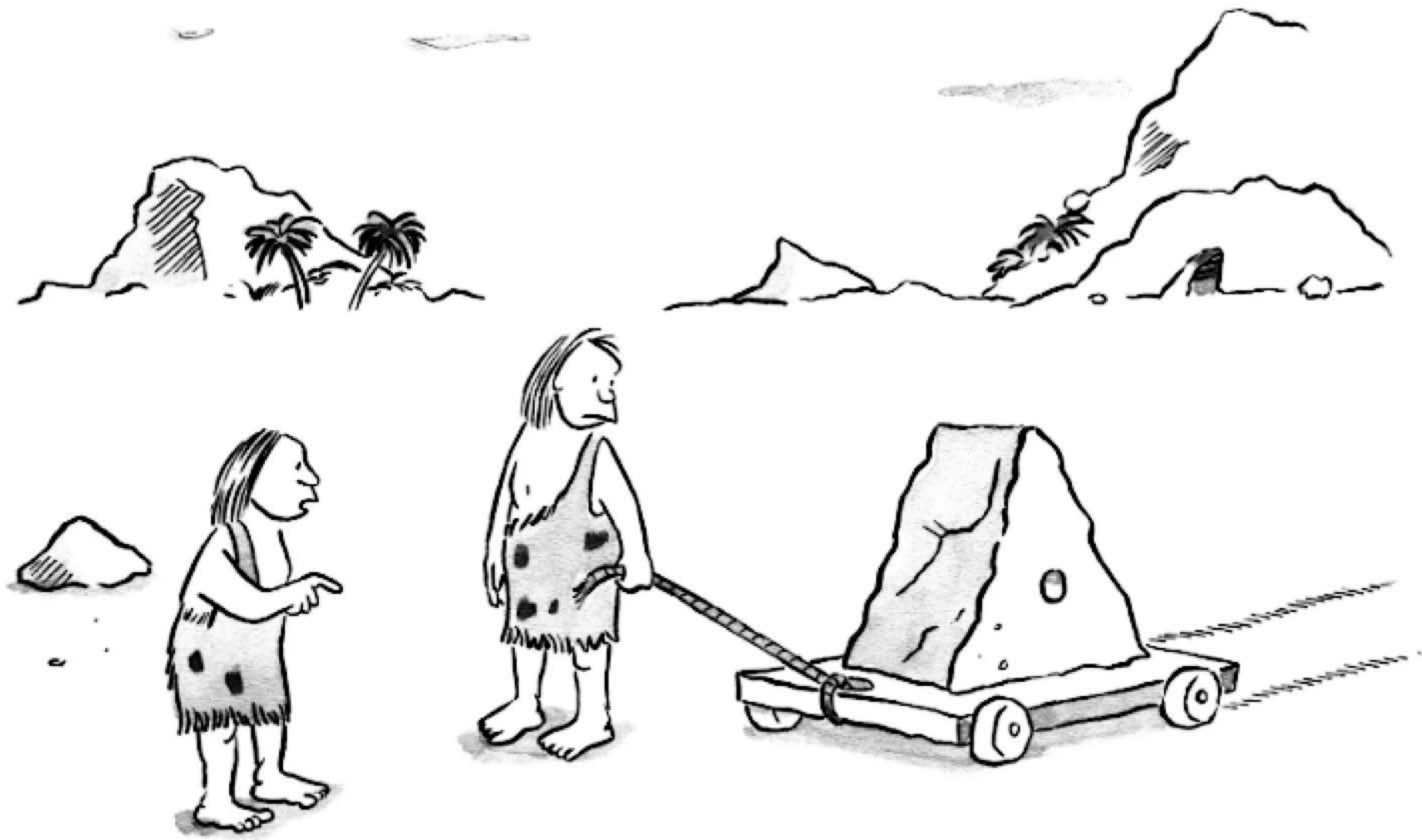


CIRCA 2016



CIRCA 2017





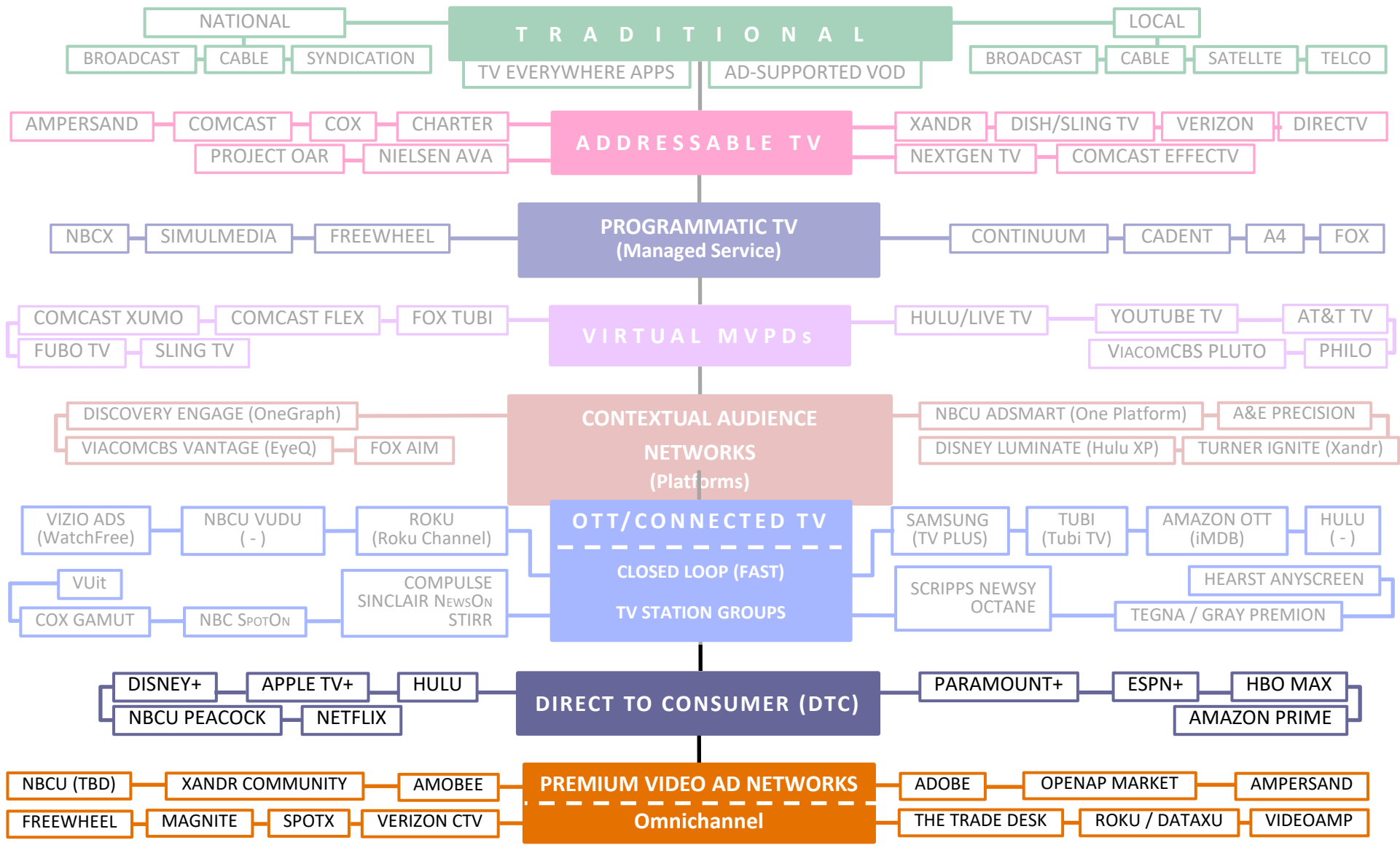
(E. Clayton)

“Tell me about that thing under it.”

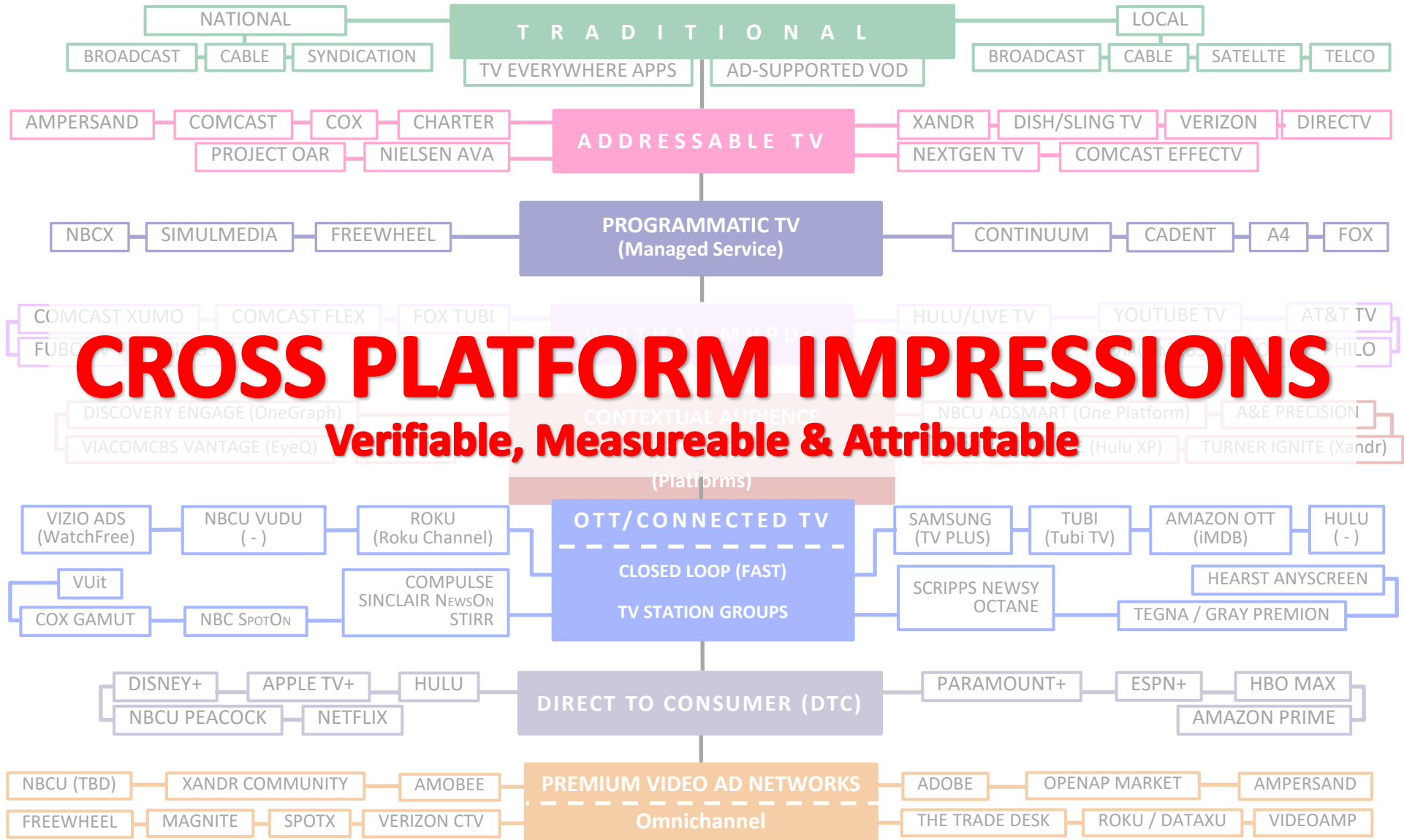
ACR INFUSION

ATTRIBUTION

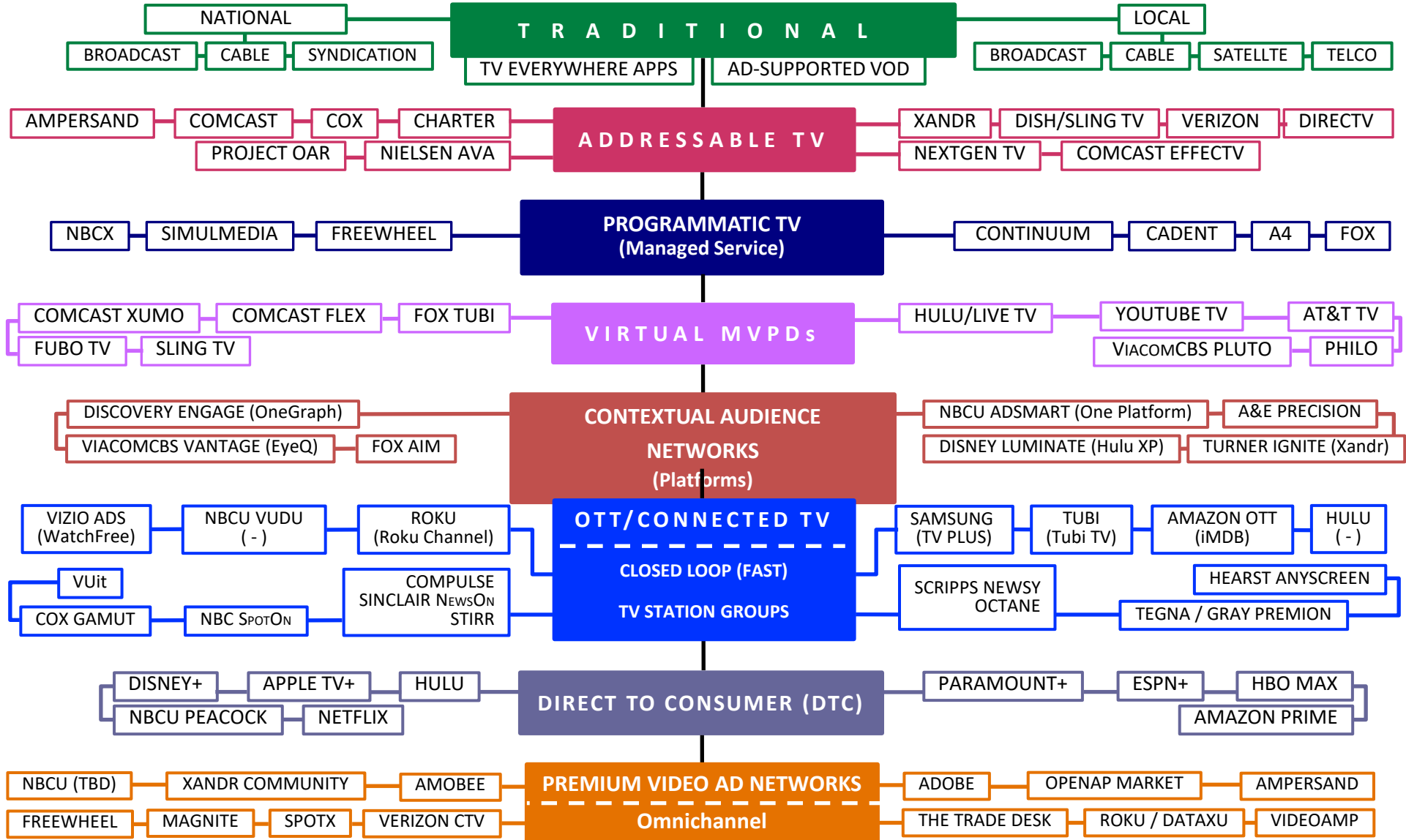
CIRCA 2019-2020



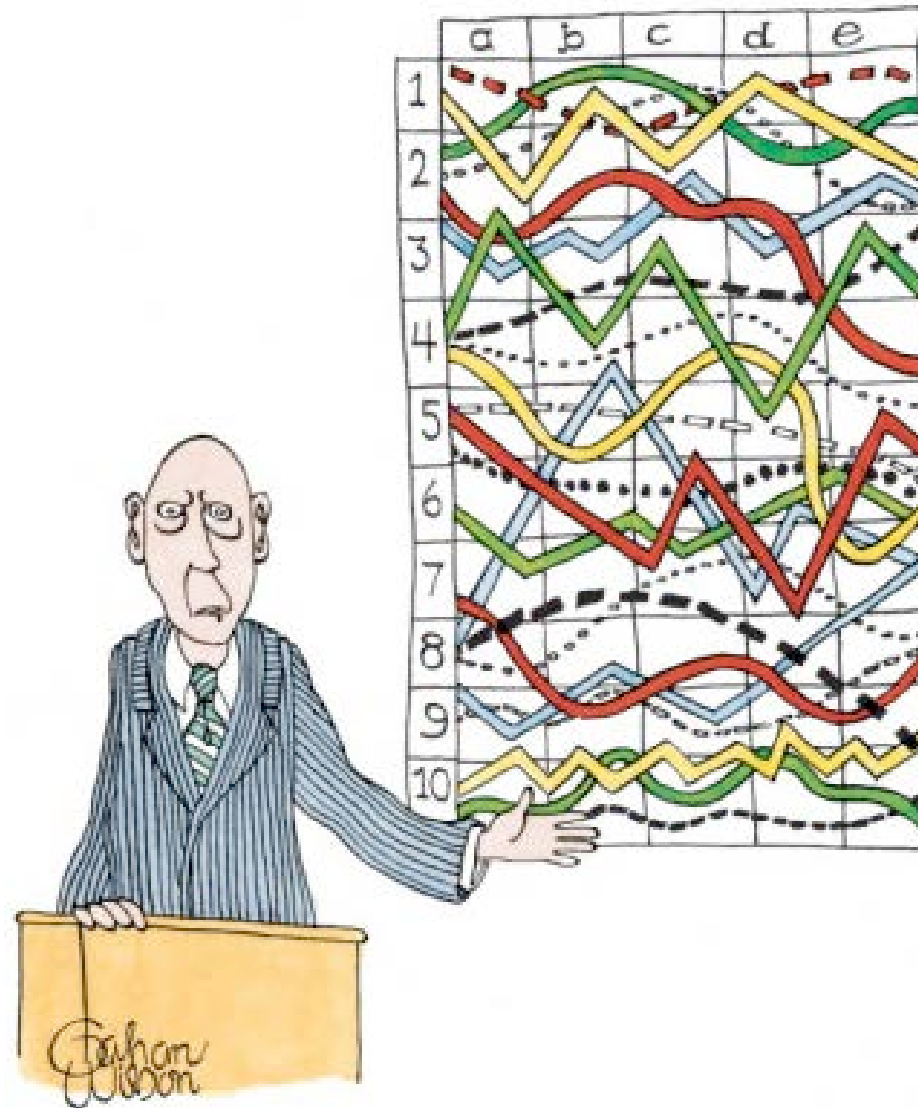
CIRCA 2019-2020



OCTOBER 27, 2020



MEASUREMENT VERIFICATION CROSS PLATFORM ATTRIBUTION



“I’ll pause for a moment so you can let this information sink in.”

RULES OF ENGAGEMENT

Each panelist will be given one uninterrupted minute to speak at the beginning of each segment.

The microphone for the panelists who are not speaking during that time will be muted.

All panelists' mics will be open for the rest of each segment allowing panelists to interject as they go back and forth on topics.

The panel discussion will be divided into the following segments:

- ◆ OTT reach extension
- ◆ Advertising agency OTT buyers
- ◆ Addressability in the OTT realm
- ◆ impressions
 - Measurement
 - Cross Platform
 - Attribution

Panel Discussion

The Experts Weigh In



Justin Evans
Samsung
Global Head of Analytics & Insights



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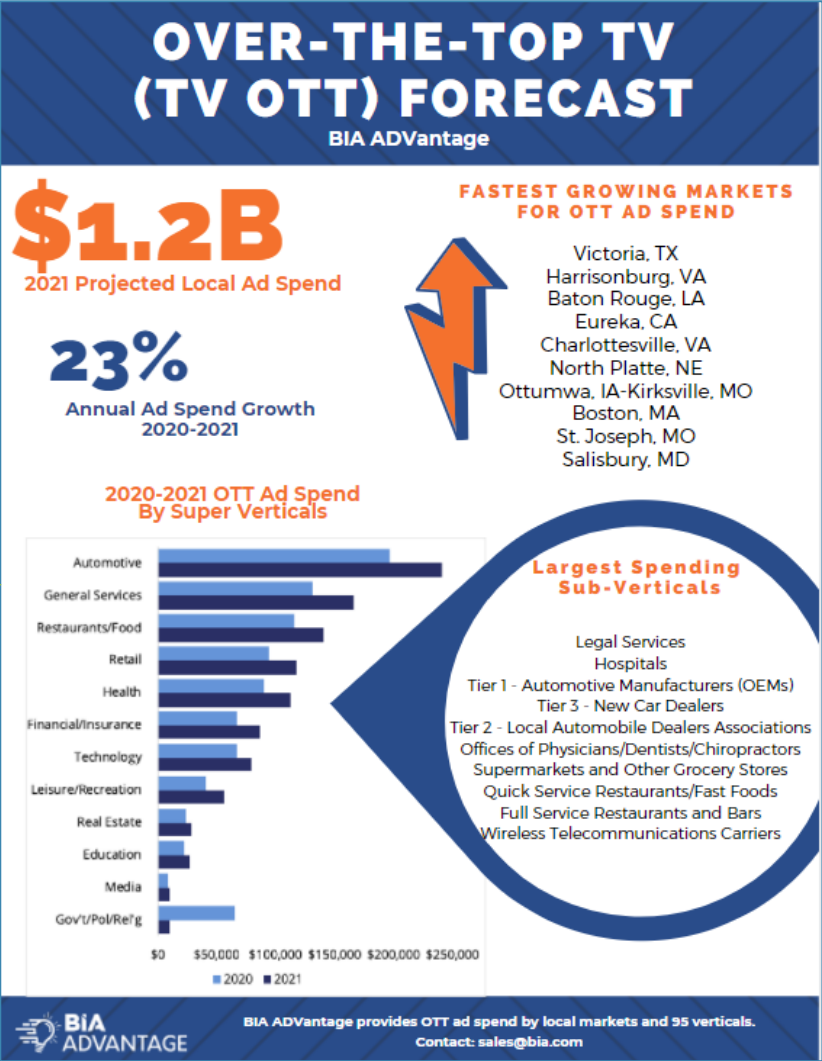


Questions?
Q&A Time

More OTT Analysis

Just for Webinar Attendees

Download here:
<http://bit.ly/BIA-OTT-Forecast>



BIA Offer: OTT Forecast Snapshot of Your Local Market

What's going on in your local market? We 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 2020 and 2021 estimates for the following:

- Total spend in a market
- OTT spend across 95 business verticals

Cost: \$95 (format: Excel spreadsheet)

PURCHASE ONLINE

Questions? Email sales@bia.com.

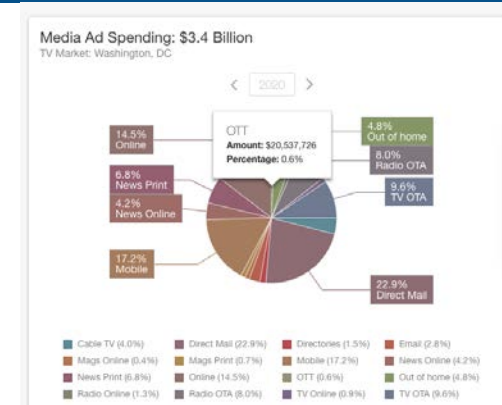
*If you are a BIA ADVantage subscriber, **login to the platform** to view your local market estimates.*



Order an OTT Forecast Snapshot for \$95

Purchase Online

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



View of OTT add spend within BIA ADVantage.



Questions & Comments:

Rick Ducey

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