



Looking Ahead into the Local OTT/CTV Marketplace

Webinar Oct. 5, 2021

Briefing Agenda and Speakers

- Welcome and thanks for joining us today.
- **On Sept 13, 2021, BIA issued its 2022 U.S. Local Ad Forecast that provides a nationwide perspective of ad spending across 16 media and 96 business verticals.**
 - In that forecast, one of the channels covered is OTT.
- Today, we will examine our OTT forecast to examine:
 - OTT ad forecast for 2021-2022
 - Business verticals spending in OTT
- Our expert panel discussion will cover:
 - Selling local OTT audiences, viewing trends and assessing OTT attribution.



Richard V. Ducey
Managing Director
BIA Advisory Services



Mark Fratrik, Ph.D.
Chief Economist and SVP
BIA Advisory Services

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 38 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



Local Market OTT Estimates

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

Podcast: OTT in the Local Media Ecosystem

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

2021 Local Digital Event Series: OTT

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

The New Rules for Streaming TV Local Advertising

Paper Available for Download

- BIA and Premion explore pandemic induced changes in the local ad market for streaming TV and look ahead to ad spending trends in the report, [A Marketer's Guide: The New Rules Ahead for Streaming TV Advertising](https://www.premion.com) ([premion.com](https://www.premion.com)).
- Report goals:
 - Help advertisers navigate the increasingly fragmented and complex OTT (Over-The-Top) marketplace.
 - Provide insights for effective planning, buying and measurement of streaming TV advertising.



How BIA Views “Local” and OTT

OTT is a small but rapidly growing segment of the local ad pie. The CTV component is growing exceptionally quickly with the rise of FASTs and the expansion of local CTV direct and programmatic selling as more audiences' stream video content on their TVs.

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 advertising is local targeted advertising included on streaming video delivered to TV sets via Internet connections and includes both IP set top boxes that receive signals from digital video ad servers (and widgets on them) as well as USB and HDMI multimedia devices.
- Revenue is all locally targeted advertising revenue sold on streaming video that is delivered to TV sets via Internet connections.

POLL

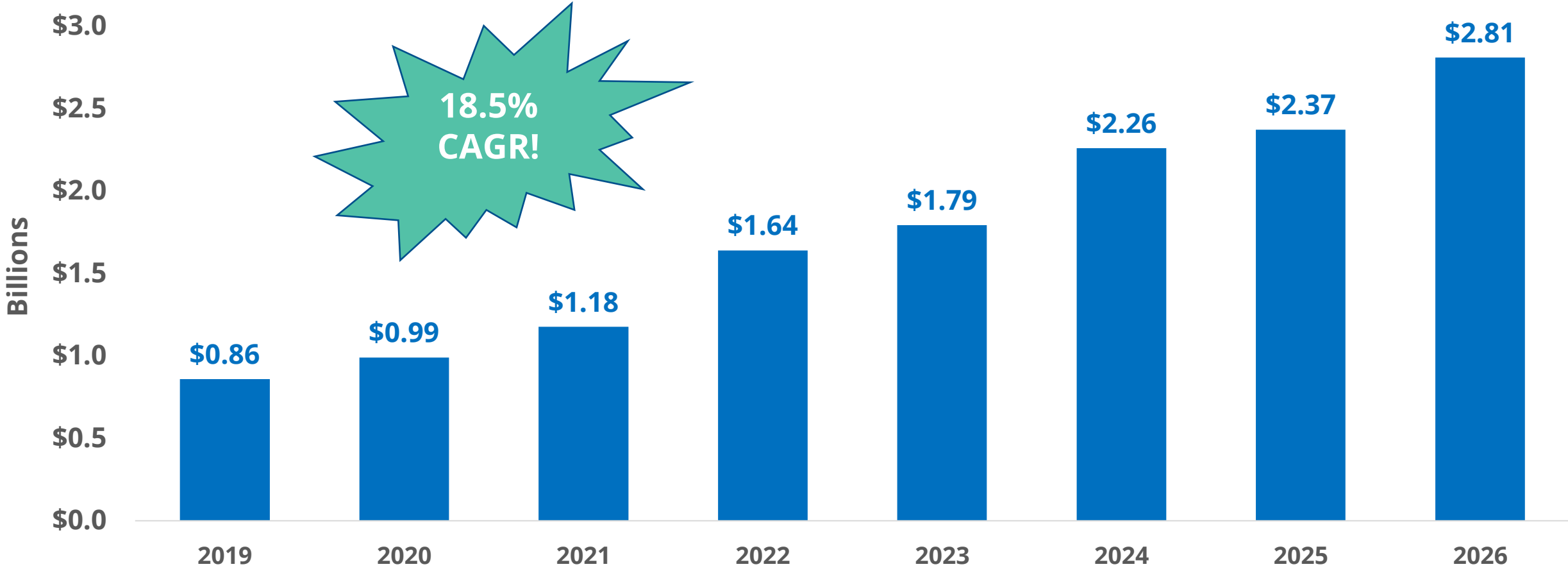
**What will the Local OTT/CTV
CAGR be for 2019-2026?**

Submit your answer...



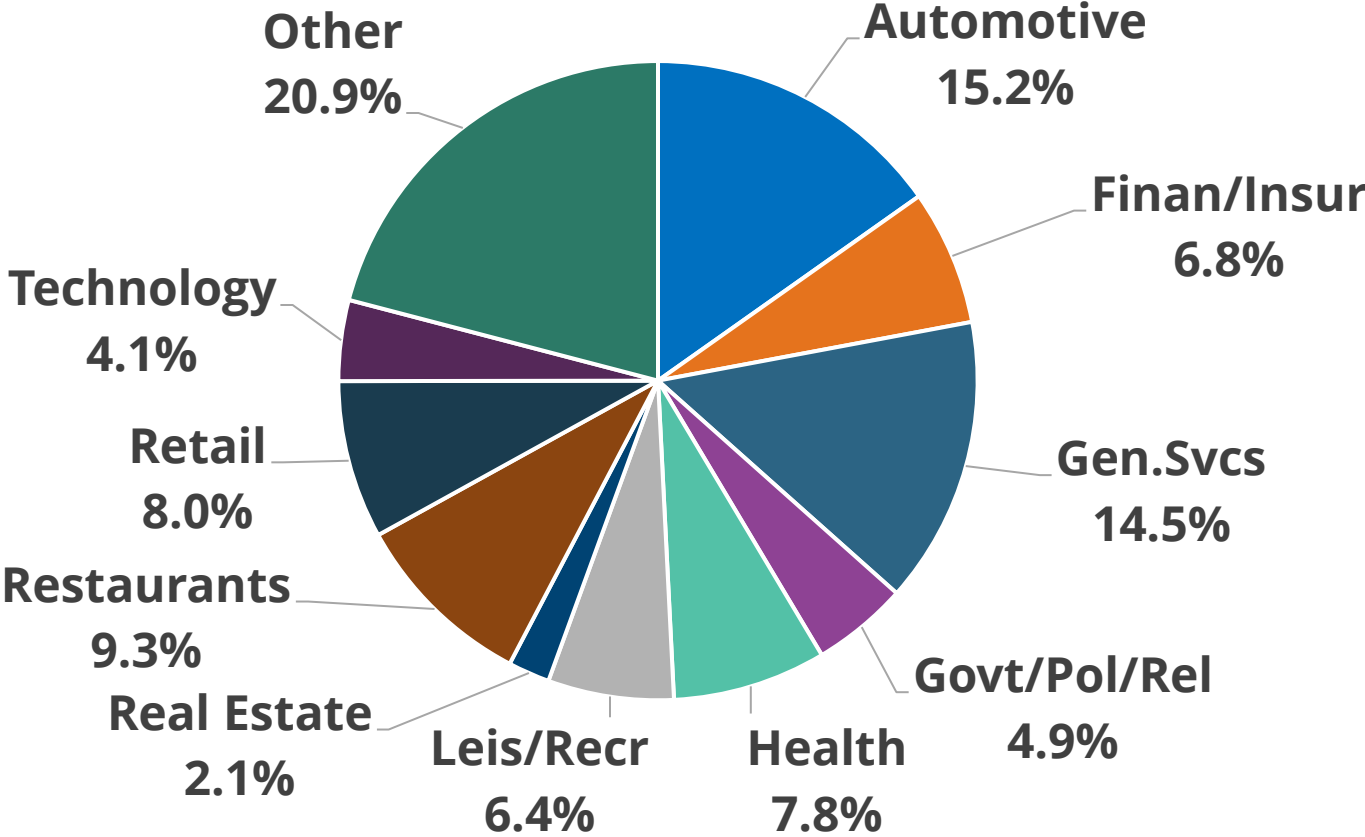
Nationwide OTT Local Advertising

BIA's 2019 – 2026 U.S. Local Ad Forecast for OTT



Distribution of Local OTT Advertising by Business Category

OTT Spenders in 2022





Let's Examine the Top 3 Sub-Vertical OTT Spenders for 2022

1. Political
2. Legal Services
3. Tier 3: New Cars Dealers

BIA's Estimated Ad Spend: **Political**

Local ad spend in 2020:

\$9.6B

In local advertising in All Markets



Local ad spend in 2022:

\$7.5B

In local advertising in All Markets



BIA's Estimated Ad Spend: Legal Services

Local ad spend in 2021:

\$6.5B

In local advertising in All Markets

1.7% goes to TV OTT

\$112.2M

Local ad spend in 2022:

\$6.2B

In local advertising in All Markets

2.1% goes to TV OTT

\$129.1M

BIA's Estimated Ad Spend: Tier 3: New Car Dealers

Local ad spend in 2021:

\$4.0B

In local advertising in All Markets

1.5% goes to TV OTT

\$58.1M

Local ad spend in 2022:

\$3.85B

In local advertising in All Markets

1.9% goes to TV OTT

\$73.9M

Welcome Our Guest Panel



James Moore

CRO

Simpli.fi



Bob Ivins

Chief Strategy Officer

TV Squared



Brian Fuhrer

SVP, Product Strategy

Nielsen



Dave Marquard

Head of Product

Premion

POLL



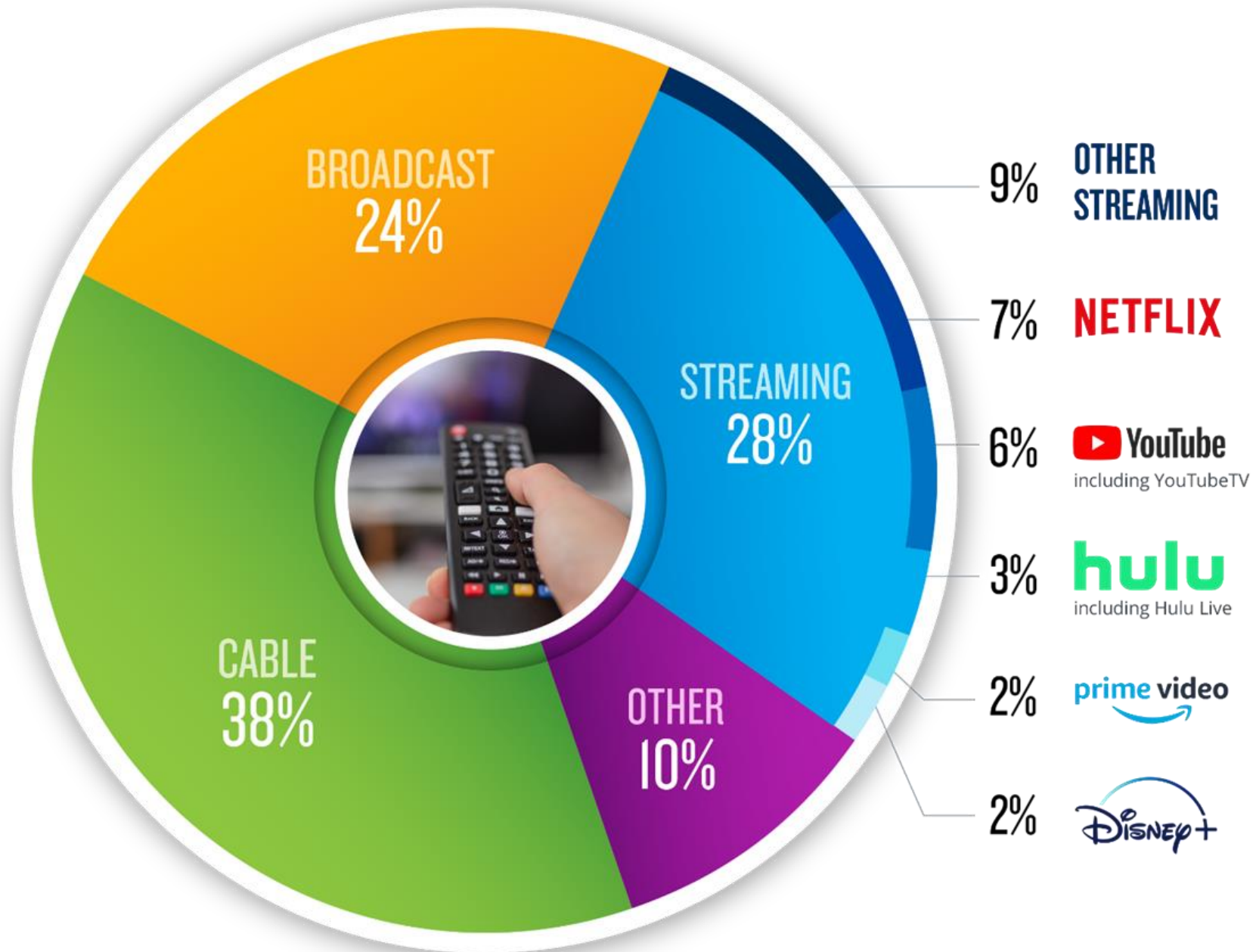
True or False: **Streaming viewing for Total Day 2+ Persons is now larger than Broadcast.**

Submit your answer...



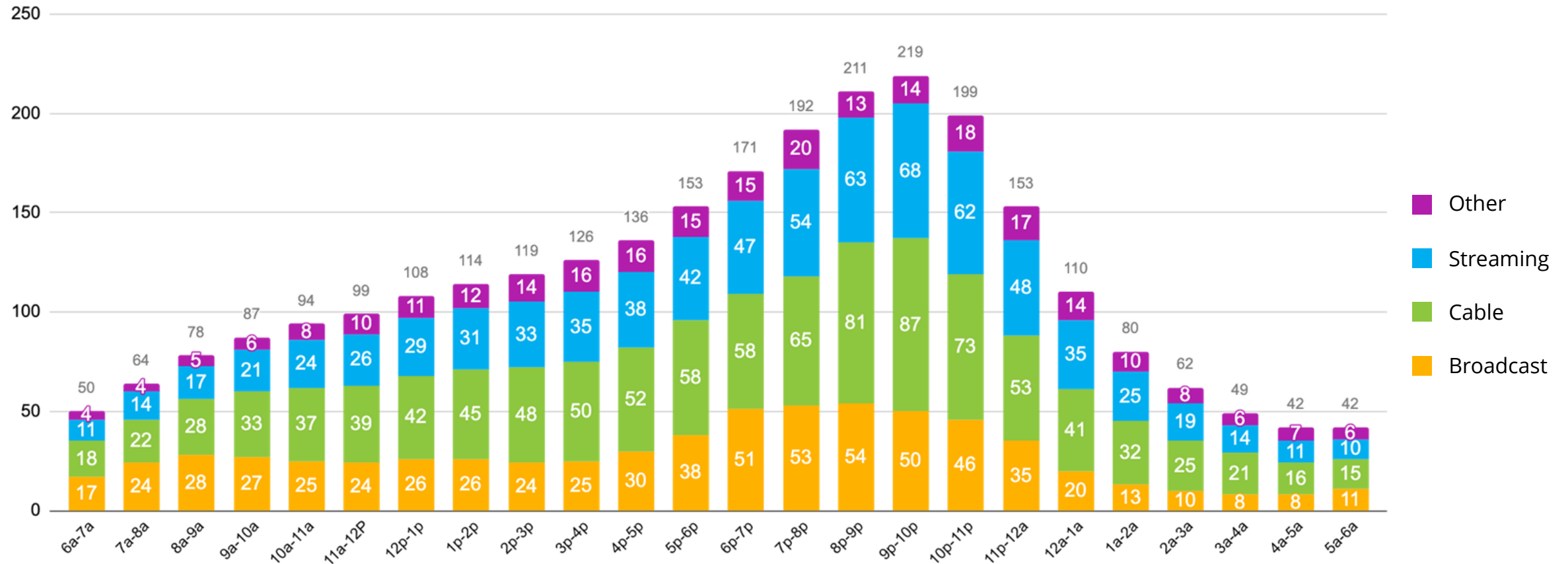
**THE GAUGE:
TOTAL TV &
STREAMING SNAPSHOT
KEY TRENDS AND UPDATES**

AUGUST 2021

TOTAL DAY
PERSONS 2+

TIME OF DAY PATTERNS FAIRLY CONSISTENT

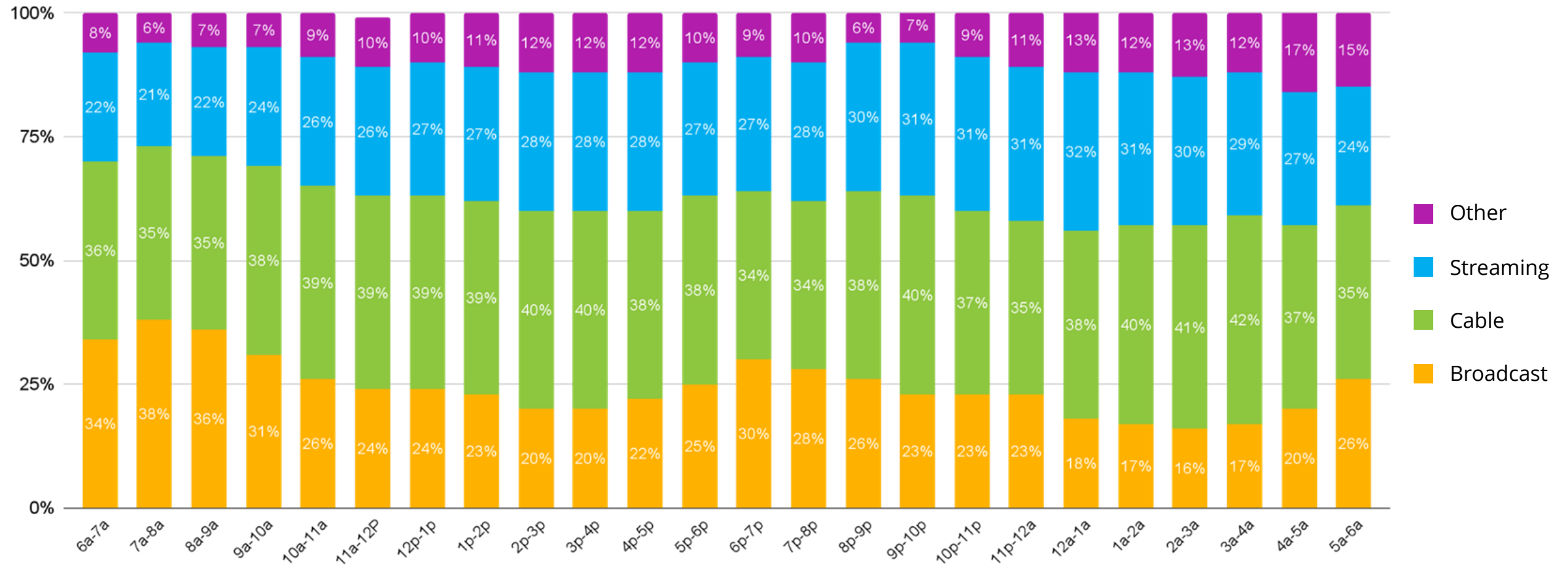
Streaming levels usually emulate traditional usage



Source: Nielsen NPOWER, National Panel and SVR Panel for Streaming Data, Minutes (Billions), August 2021 (7/26/2021- 8/29/2021)

TRADITIONAL DELIVERY MAINTAINS ADVANTAGES

Morning programs on Broadcast and Cable remain strong



Source: Nielsen NPOWER, National Panel and SVR Panel for Streaming Data, Share of Gross TV Usage Minutes, August 2021 (7/26/2021- 8/29/2021)



nielsen
.....

SHAPING A SMARTER MARKET™

PREMION

Leading the Evolution in Local OTT & CTV Advertising

125+

125+ TV &
MEDIA BRANDS



PRECISION AUDIENCE
TARGETING



CLOSED-LOOP
ATTRIBUTION



TAG CERTIFIED
AGAINST FRAUD

210

210 US
DMAs



TECH LEADERSHIP
Awards 2021



ABBI AWARDS

PREMION

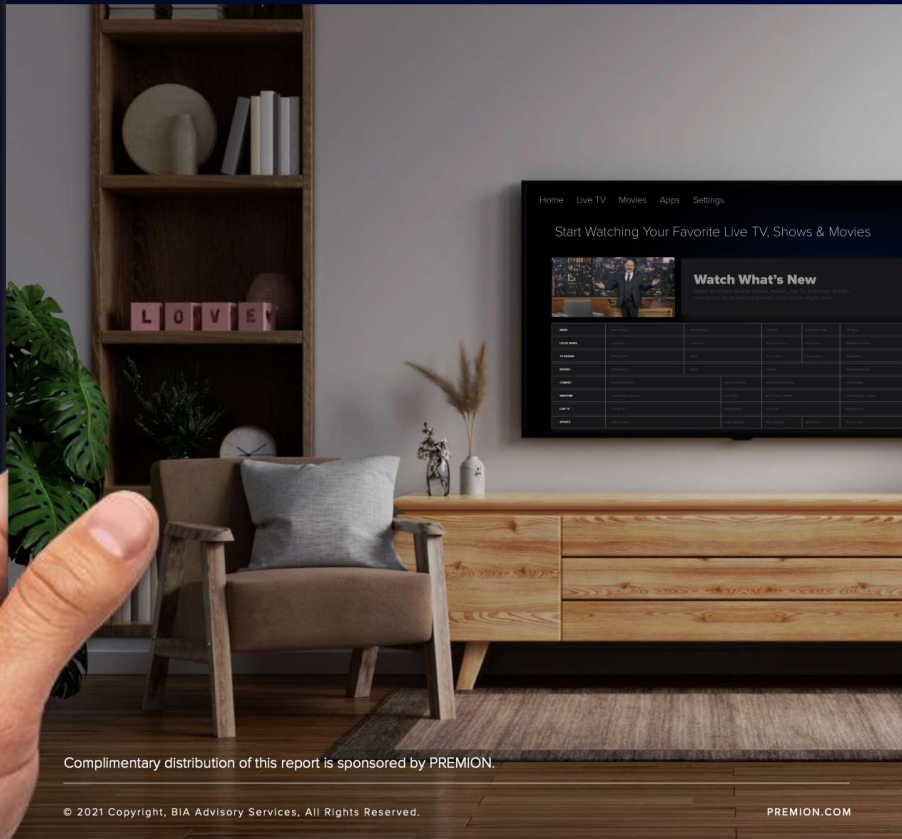
BIA | ADVISORY
SERVICES

PREMION

AUGUST 2021

PREMIUM VIDEO TRENDS

A Marketer's Guide:
The New Rules Ahead
for Streaming TV Advertising



Complimentary distribution of this report is sponsored by PREMION.

© 2021 Copyright, BIA Advisory Services, All Rights Reserved.

PREMION.COM

A Marketer's Guide: The New Rules Ahead for Streaming TV Advertising

Download Now

premion.com

PREMION

BIA Webinar Briefing

October 5, 2021



Simpli.fi

October 1, 2021

Blackstone Closes Significant Investment in Simpli.fi, a Leading Programmatic Advertising Platform, at \$1.5 Billion Valuation

2021

Simpli.fi CEO,
Frost Prioleau,
Named a Top 50
SaaS CEO

The Software Report

2021:

Effective Digital Marketing
Awards Finalist for Most
Effective Retail Campaign and
Most Effective Attribution
Solution Categories

Masterclassing

2021:

Programmatic Power
Players List
AdExchanger

2020:

Finalist for Best TV
Advertising Technology
Category

AdExchanger

Agency & Media Clients:

1400+

Employees:

450+

Monthly Campaigns:

130K+

**Advantage Agency
Management Software**

Accounting

Project Management

Creative Proofing

Media Planning & Buying

Payments

**Simpli.fi Programmatic Media
Buying Platform (DSP)**

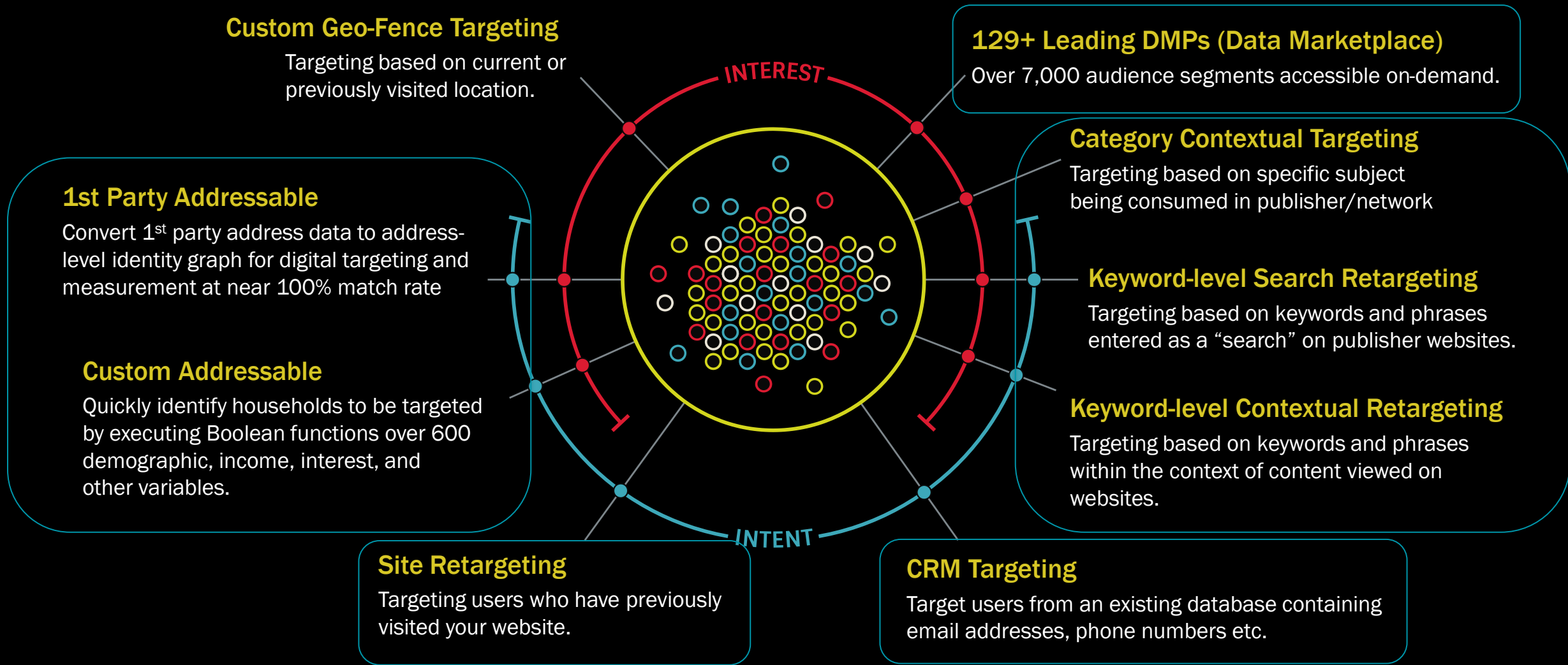
Highly Automated DSP

Strong CTV, Mobile, HH, Targeting

Hyperlocal Audience Customization

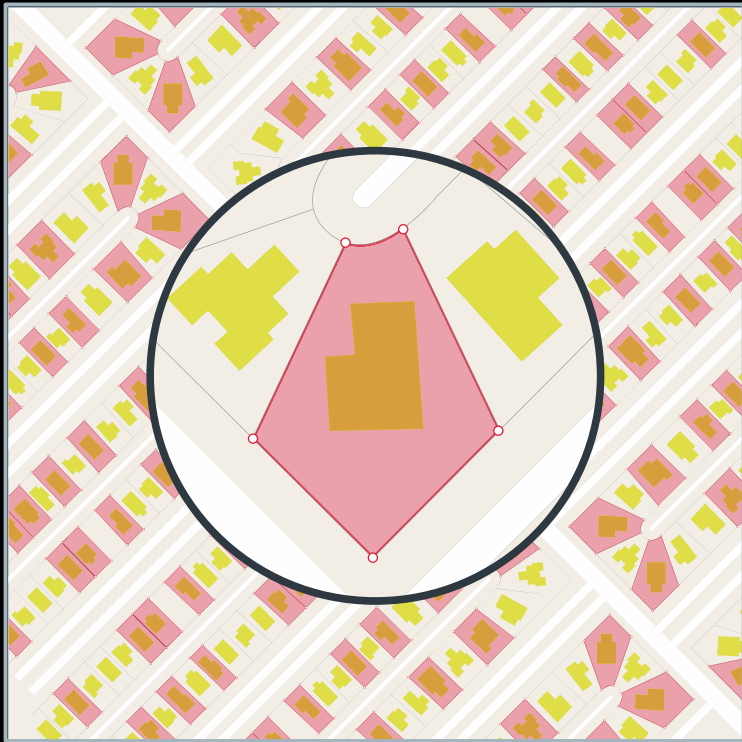
Incremental Footfall, Leads, Sales

Highly Targeted Audience-First CTV Capabilities



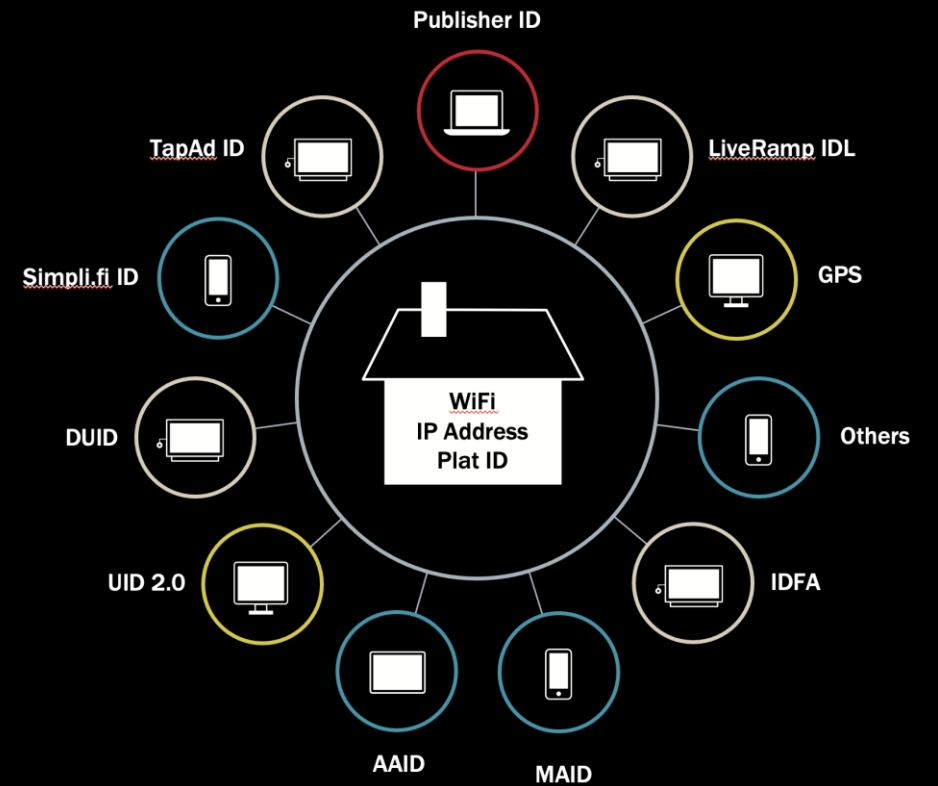
Products and Solutions:
Snapshot Of Addressable Programmatic

(Addressable Plat ID) Address-Level Identity Mapping



Property Line Precision

Our technology defines the exact latitude & longitude of individual property boundaries as validated by county tax records for maximum accuracy. Every commercial and residential property in the United States is assigned an identifying plat ID unique to a property level geo-fence. There is no PII information associated with the plat ID.



1st Party Addressable Activation (Opt In or Opt Out)

Simpli.fi's Addressable Geo-Fencing brings to advertisers a powerful, efficient, and accurate new way to target specific households identified in your CRM.

New Uploaded Audience

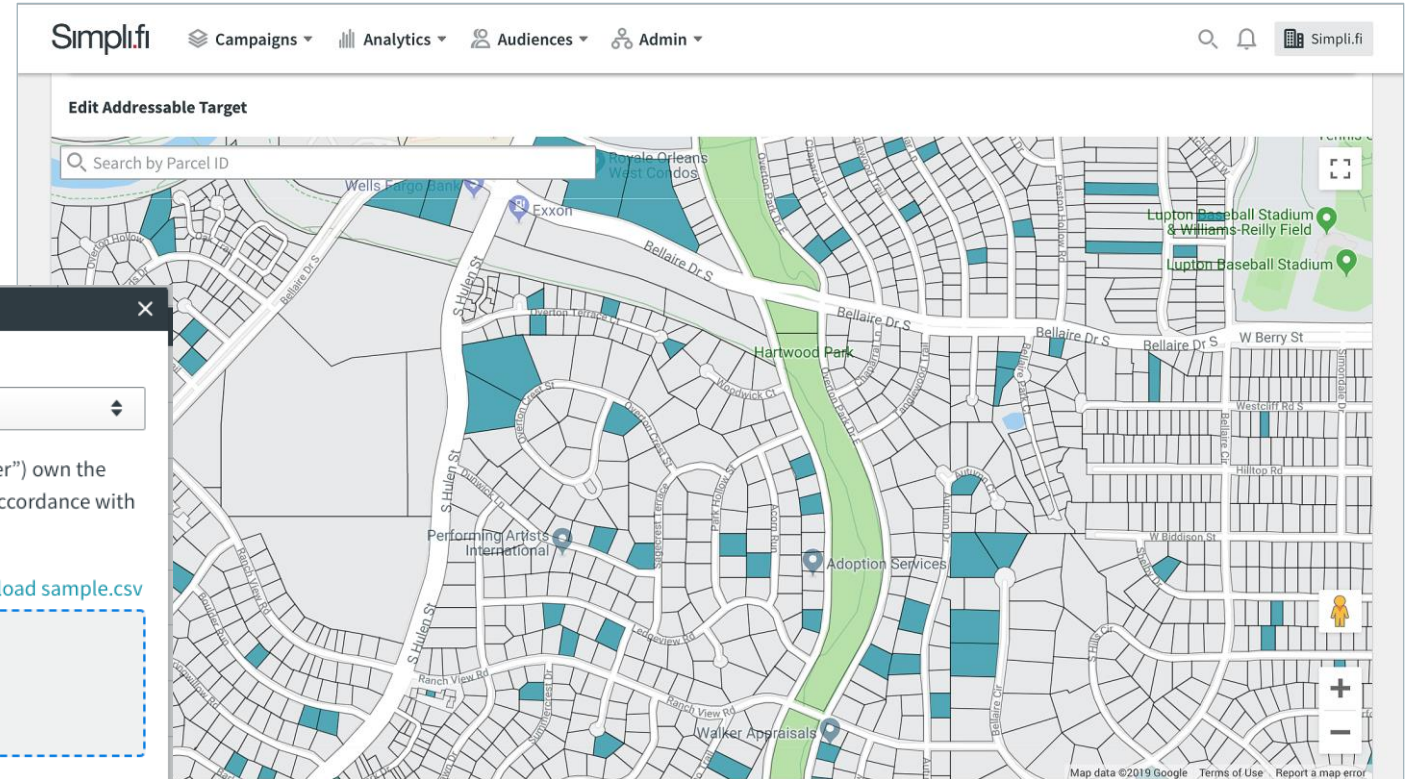
Audience Name:

Organization:

By uploading physical addresses or other data, you warrant and represent that you ("Customer") own the information and have the right to collect and use the information for marketing purposes in accordance with applicable laws.

Upload CSV File: [Download sample.csv](#)

A csv file adhering to our format, see sample above
Required fields: address, city, state, zip
Optional fields: latitude, longitude



Consistently a 97%+ Match Rate

Abertson 287 Trade Zipps

AUDIENCE SUMMARY

12,997 Parcels

> 60K Estimated Devices

Visitor Frequency

Frequent

Recency

Select

LOCATIONS (1)

85050

Postal Code X

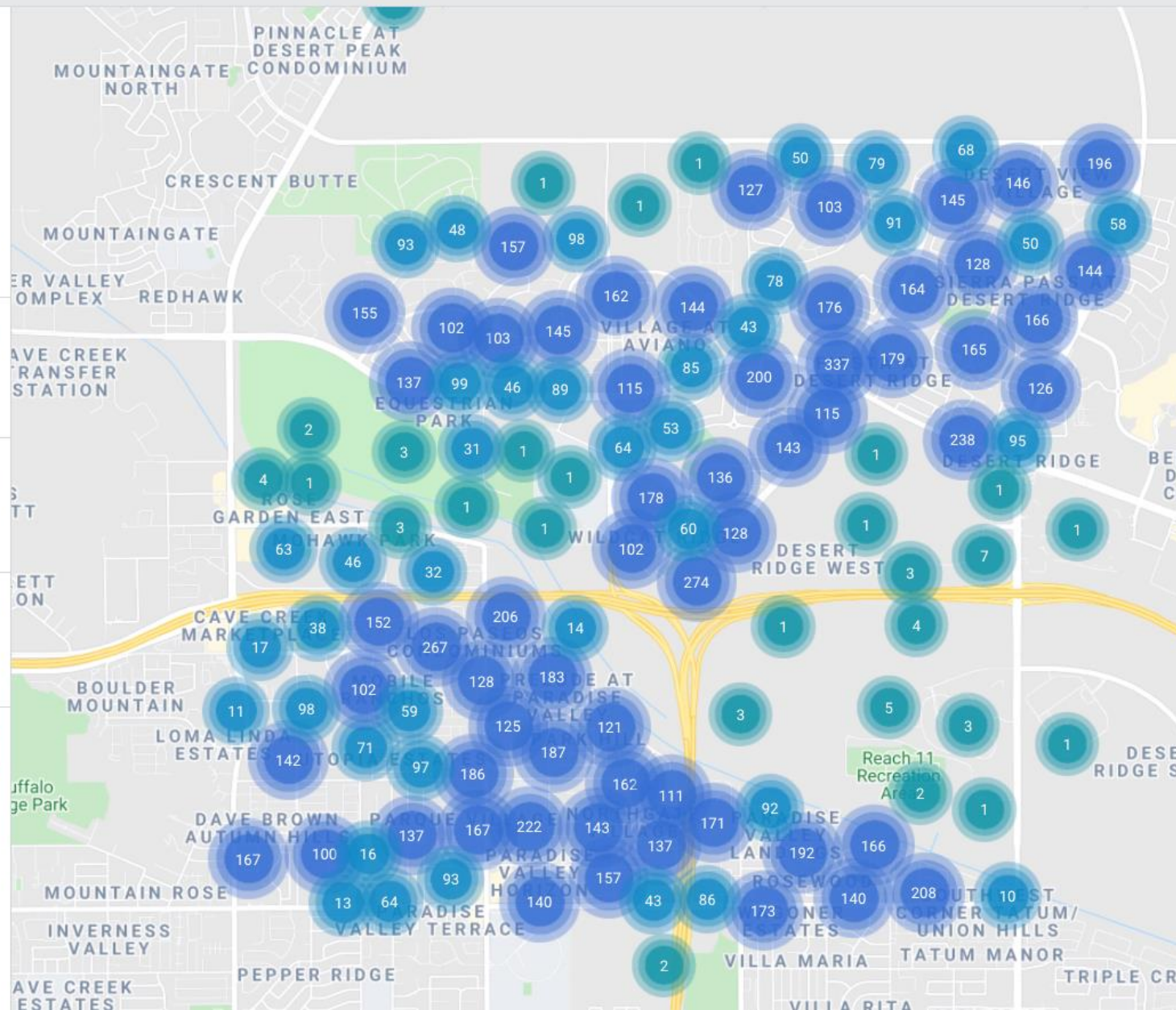
RESIDENTIAL TARGETING

Add residential targeting preferences to build out a demographics-based audience

PROPERTY TARGETING

Add desired property restrictions to further focus your audience

Generate Audience



Household Demographic Filtering

- Target nationwide or as granular as a single zip code
- Target by hundreds of property types, demographics, financial data and more in any combination
- Real-time household and device counts
- Measure online or offline conversions in real-time for no additional costs

Thank You

James Moore

Chief Revenue Officer at Simpli.fi

(602) 373-5886

james@simpli.fi

TVSquared is the largest independent global measurement and attribution platform for converged TV



One Platform that Scales

5,000+ campaigns per week

75+ countries

6,000+ advertisers

1,000+ active weekly users

25B+ impressions monthly

4 global data centers

TVSquared's Evolution

Did my TV campaign work?

2012-2015

SaaS platform built for always-on probabilistic TV attribution, linking ad occurrence data to digital outcomes (web visits, app downloads, etc.).



2015-2018

Scaled to include advertisers from more than 75 countries and launched self-serve enterprise-platform using probabilistic TV attribution.



2019/2020

Expanded to cross-platform TV attribution, adding streaming services.

To date, we have added 70+ direct publisher and platform integrations and tagged 20+ adservers, creating the largest coverage of the streaming universe .



Cross-platform measurement simplified

2020

Added authenticated household-level linear viewing data, with enhanced audience information.

Expanded deterministic measurement beyond outcomes to include reach and frequency, unique reach and audience.



2021

Full cross-platform TV measurement and attribution with identity resolution.

Added location data for QSR, Retail and Auto and adding offline for CPG.

Pre-audit started for MRC accreditation, and well aligned with IAB, VAB and other industry organizations.



Linear, CTV and Addressable for Everyone, Everywhere

5,000+ active advertisers spanning all categories, from retail to insurance, finance, travel, CPG, QSR + more



Brands & Agencies

1,000+
advertisers activated

Direct relationships with advertisers delivering converged TV measurement and outcomes from high-growth DTCs to e-commerce, travel, insurance, QSR and retail

Peloton | The Zebra | St Jude's

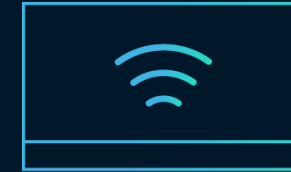


Enterprise / Networks

4,000+
advertisers activated

Thousands of sellers trained to offer full cross-platform attribution and outcomes across local, national, CTV and addressable TV using currency grade datasets globally

Comcast | Sky | Tegna



Advanced TV / Digital

100s
advertisers activated

Self-serve platform being used for heavy adoption of incremental reach across direct streaming publishers and DSPs, delivering always-on, census-level analytics to traditional and digitally-native TV advertisers

Tubi | Hulu | Magnite

POLL



Is Local OTT/CTV still part of buyers' "experimental budget" or has it gone mainstream?

Submit your answer...

Panel Q&A



James Moore

CRO

Simpli.fi



Bob Ivins

Chief Strategy Officer

TV Squared



Brian Fuhrer

SVP, Product Strategy

Nielsen



Dave Marquard

Head of Product

Premion



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>

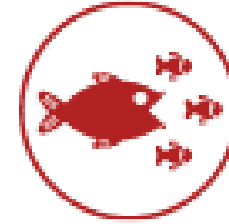


Virtual Briefings & Strategy Sessions

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.

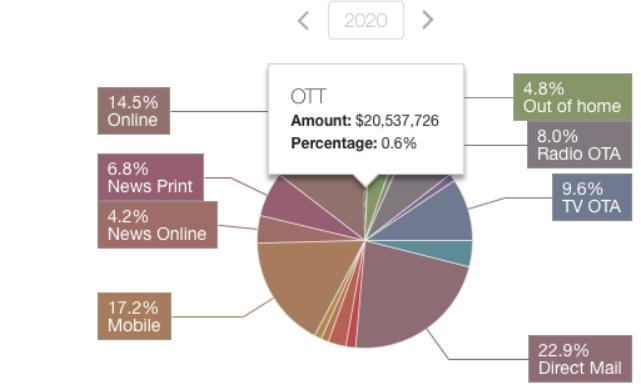
➔ **BIA ADVantage Clients:** [Login to the platform](#) to view your local market estimates.

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 OR WANT ASSISTANCE?

**Get In
Touch With
Us**

Website

www.bia.com

Emails

advantage@bia.com

sales@bia.com

Daily Newsletter

<http://bit.ly/BIANewsletter>

Podcast

<https://bit.ly/LeadingLocalInsights-BIA>