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
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.
2020 OTT Spending in 6 Major Verticals

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

- Automotive: $195,966.23
- General Services: $131,259.91
- Retail: $94,163.82
- Finance/Insurance: $90,040.32
- Healthcare: $67,339.98
- Technology: $67,049.02

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

NATIONAL
BROADCAST CABLE SYNDICATION

TRADITIONAL
TV EVERYWHERE APPS AD-SUPPORTED VOD

LOCAL
BROADCAST CABLE SATELLITE TELCO
CIRCA 2015

TRADITIONAL
- NATIONAL
  - BROADCAST
  - CABLE
  - SYNDICATION
- TV EVERYWHERE APPS
- AD-SUPPORTED VOD
- LOCAL
  - BROADCAST
  - CABLE
  - SATELLITE
  - TELCO

ADDRESSABLE TV
- AMPERSAND
- COMCAST
- COX
- CHARTER
- PROJECT OAR
- NIELSEN AVA
- XANDR
- DISH/SLING TV
- VERIZON
- DIRECTV
- NEXTGEN TV
- COMCAST EFFECTV
- CONTINUUM
- CADENT
- A4
- FOX

PROGRAMMATIC TV
(Managed Service)

VIRTUAL MVPDs
- NBCX
- SIMULMEDIA
- FREEWHEEL
- COMCAST XUMO
- COMCAST FLEX
- FOX TUBI
- HULU/LIVE TV
- YOUTUBE TV
- AT&T TV
- VIACOMCBS PLUTO
- PHOLO
"Tell me about that thing under it."
ACR INFUSION
ATTRIBUTION
CIRCA 2019-2020

DIRECT TO CONSUMER (DTC)

- ESPN+
- PARAMOUNT+
- HULU
- AMAZON PRIME
- DISNEY+
- APPLE TV+

XANDR
- DISH/SLING TV
- VERIZON
- DIRECTV
- NEXTGEN TV
- COMCAST EFFECTV

PREMIUM VIDEO AD NETWORKS

- ADOBE
- OPENAP MARKET
- AMPERSAND
- THE TRADE DESK
- ROKU / DATAXU
- VIDEOAMP

DIRECT TO CONSUMER (DTC)

- NBCU (TBD)
- FREEWHEEL
- AMOBEE
- XANDR COMMUNITY

AMPERSAND
- COMCAST
- COX
- CHARTER
- PROJECT OAR
- NIELSEN AVA

PROGRESSIVE BEHAVIORAL
AD TARGETING

- AMPERSAND
- COMCAST
- COX
- CHARTER
- PROJECT OAR
- NIELSEN AVA

OPENAP MARKET

- AMPERSAND
- COMCAST
- COX
- CHARTER
- PROJECT OAR
- NIELSEN AVA

THE TRADE DESK

- AMPERSAND
- COMCAST
- COX
- CHARTER
- PROJECT OAR
- NIELSEN AVA

VIDEOAMP

- AMPERSAND
- COMCAST
- COX
- CHARTER
- PROJECT OAR
- NIELSEN AVA

CLOSED LOOP (FAST)

TV STATION GROUPS

- DISCOVERY ENGAGE (OneGraph)
- VIACOMCBS VANTAGE (EyeQ)
- FOX AIM
- DISNEY LUMINATE (Hulu XP)

OTT/CONNECTED TV

- VIZIO ADS (WatchFree)
- NBCU VUDU (-)
- ROKU (Roku Channel)
- NIELSEN AVA
- DISNEY+
- Apple TV+
- HULU
- NBCU PEACOCK
- NETFLIX

DIRECT TO CONSUMER (DTC)

- NBCU (TBD)
- XANDR COMMUNITY
- MAGNITE
- SPOTX
- VERIZON CTV

PREMIUM VIDEO AD NETWORKS

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- THE TRADE DESK
- ROKU / DATAXU
- VIDEOAMP

Omnichannel

- NBCX
- SIMULMEDIA
- FREEWHEEL

PROGRAMMATIC TV

- CONTINUUM
- CADENT
- A4
- FOX

AMPERSAND
- COMCAST
- COX
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- NIELSEN AVA

CROSS PLATFORM IMPRESSIONS

Verifiable, Measureable & Attributable

- CIRCA 2019-2020
- TRADITIONAL
- NATIONAL
- BROADCAST
- CABLE
- SYNDICATION
- LOCAL
- BROADCAST
- CABLE
- SATELITE
- TELECO
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- PROGRAMMATIC TV
- (Managed Service)
- CONTINUUM
- CADENT
- A4
- FOX
- CROSS PLATFORM IMPRESSIONS
- Verifiable, Measureable & Attributable
- PLATFORMS
- (Platforms)
- TURNER IGNITE (Xandr)
- NBCU ADSMART (One Platform)
- A&E PRECISION
- DISCOVERY ENGAGE (OneGraph)
- VIACOMCBS VANTAGE (EyeQ)

CIRCA 2019-2020

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“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
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Adam Gaynor
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Chris Wilson
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Questions?

Q&A Time
More OTT Analysis

Just for Webinar Attendees

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, link 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.