Looking Ahead into the Local OTT/CTV Marketplace
Webinar Oct. 5, 2021
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.
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.

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

2021 Local Digital Event Series: OTT

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**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.
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

Billions

<table>
<thead>
<tr>
<th>Year</th>
<th>Billions</th>
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</thead>
<tbody>
<tr>
<td>2019</td>
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<tr>
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<tr>
<td>2026</td>
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</tbody>
</table>

18.5% CAGR!
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

0.8% goes to TV OTT

$74.4M

Local ad spend in 2022:

$7.5B

In local advertising in All Markets

1.0% goes to TV OTT

$73.7M

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
True or False: Streaming viewing for Total Day 2+ Persons is now larger than Broadcast.
THE GAUGE: TOTAL TV & STREAMING SNAPSHOT
KEY TRENDS AND UPDATES
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

Leading the Evolution in Local OTT & CTV Advertising

125+ TV & Media Brands
Precision Audience Targeting
Closed-Loop Attribution
TAG Certified Against Fraud
210 US DMAs

Download Now
premion.com
BIA Webinar Briefing

October 5, 2021
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

1st Party Addressable
Convert 1st party address data to address-level identity graph for digital targeting and measurement at near 100% match rate.

Custom Addressable
Quickly identify households to be targeted by executing Boolean functions over 600 demographic, income, interest, and other variables.

Custom Geo-Fence Targeting
Targeting based on current or previously visited location.

Site Retargeting
Targeting users who have previously visited your website.

CRM Targeting
Target users from an existing database containing email addresses, phone numbers etc.

Keyword-level Search Retargeting
Targeting based on keywords and phrases entered as a “search” on publisher websites.

Keyword-level Contextual Retargeting
Targeting based on keywords and phrases within the context of content viewed on websites.

Category Contextual Targeting
Targeting based on specific subject being consumed in publisher/network.

129+ Leading DMPs (Data Marketplace)
Over 7,000 audience segments accessible on-demand.
Products and Solutions:

Snapshot Of Addressable Programmatic
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.

Consistently a 97%+ Match Rate
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
- 1,000+ active weekly users
- 75+ countries
- 25B+ impressions monthly
- 6,000+ advertisers
- 4 global data centers
Cross-platform measurement simplified

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.

GoDaddy

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.

hulu

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.

MediaMath

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.

BlockGraph

Spectrum

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

Did my TV campaign work?
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
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)*


**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)*

Email us at [advantage@bia.com](mailto:advantage@bia.com) to discuss how we can help you with your custom projects.
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.
QUESTIONS ABOUT THE FORECAST OR WANT ASSISTANCE?

Get In Touch With Us

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www.bia.com

Emails
advantage@bia.com
sales@bia.com

Daily Newsletter

Podcast

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