



VIDEO ADVERTISING BUREAU - REPORT 2018

Linear TV and OTT: Living Together in Harmony

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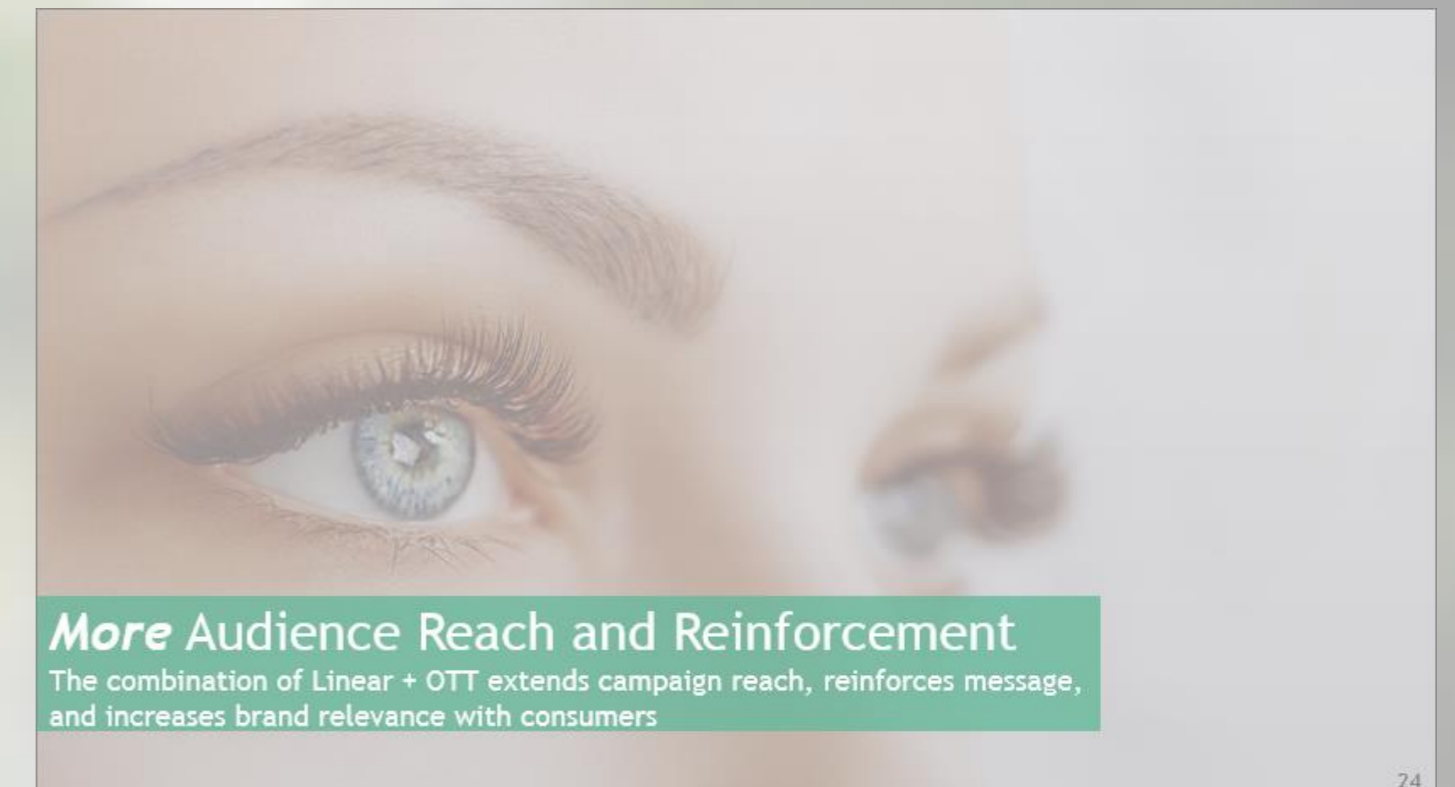
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Summary: Need We Say *More*?



Delivering *More* To Marketers

The face of the video ecosystem is evolving. One particular area of growth is ad-supported OTT, the professionally-produced video programming that is accessed without an MVPD subscription.

At the same time, Ad-Supported Linear TV dominates the way Americans view programming. Seventy-three percent of households hold an MVPD subscription and each week adults spend 81% of their ‘video time’ with Television.

The convergence of consumer demand for premium content + advancing technology means that consumers have more choices than ever of how to view the ad-supported programming they love.

In our previous insights report, [*You Down With OTT?*](#), released in early 2018, we showed that the growth of OTT means **MORE opportunities** - for both consumers and marketers. It provides more content, choice, and convenience to consumers. It also provides marketers with new platforms on which to reach and engage their audiences.

It follows then that an advertising campaign that utilizes *both* Linear TV and OTT is greater than the sum of its parts.

Ad-supported OTT should be considered as part of a campaign’s overall video mix, as it offers the same engaging, premium, brand-safe programming found on linear TV.

The synergy of Linear TV + ad-supported OTT provides **MORE** to advertisers:

- ❖ **More** Viewer Engagement
- ❖ **More** Audience Reach and Message Reinforcement
- ❖ **More** Premium Ad Opportunities & Outcomes

Join us as we explore how the harmony of linear TV + ad-supported OTT can deliver a stronger campaign for advertisers.



Definitions

Linear TV: Ad-supported cable or broadcast TV programming viewed live as it airs or time-shifted

OTT (over-the-top): Premium long form video content that is streamed over the internet through an app or device onto a TV (or PC, Tablet, or Smartphone) without requiring users to subscribe to a wired cable, telco, or satellite TV service

Ad-Supported OTT: Services or devices featuring professionally produced video programming that is accessed without an MVPD subscription. Such as:

Ad-Supported TV OTT Services	
<p>Ad-Supported TV Network Platforms No MVPD authentication needed</p>	<p>Ad-Supported OTT Aggregators</p>

OTT Devices		
<p>Connected TV</p>	<p>Internet Streaming Player</p>	<p>Game Console</p>

vMVPDs are not included in this report as the focus is on ad-supported content that can be accessed directly from a programmer/aggregator through a connected TV device, not via a subscription platform (e.g. Directv Now, Sling)

Source: SNL Kagan OTT Services % Devices, U.S. market. Note: Does not include full listing of OTT services

A Campaign Utilizing Both Linear TV and OTT Offers *More* To Marketers

More Viewer Engagement:

Improves brand health metrics and advertising impact



More Audience Reach and Message Reinforcement : Drives incremental reach across all age groups and among a variety of target audiences/content areas; also provides increased message reinforcement and brand relevance with consumers

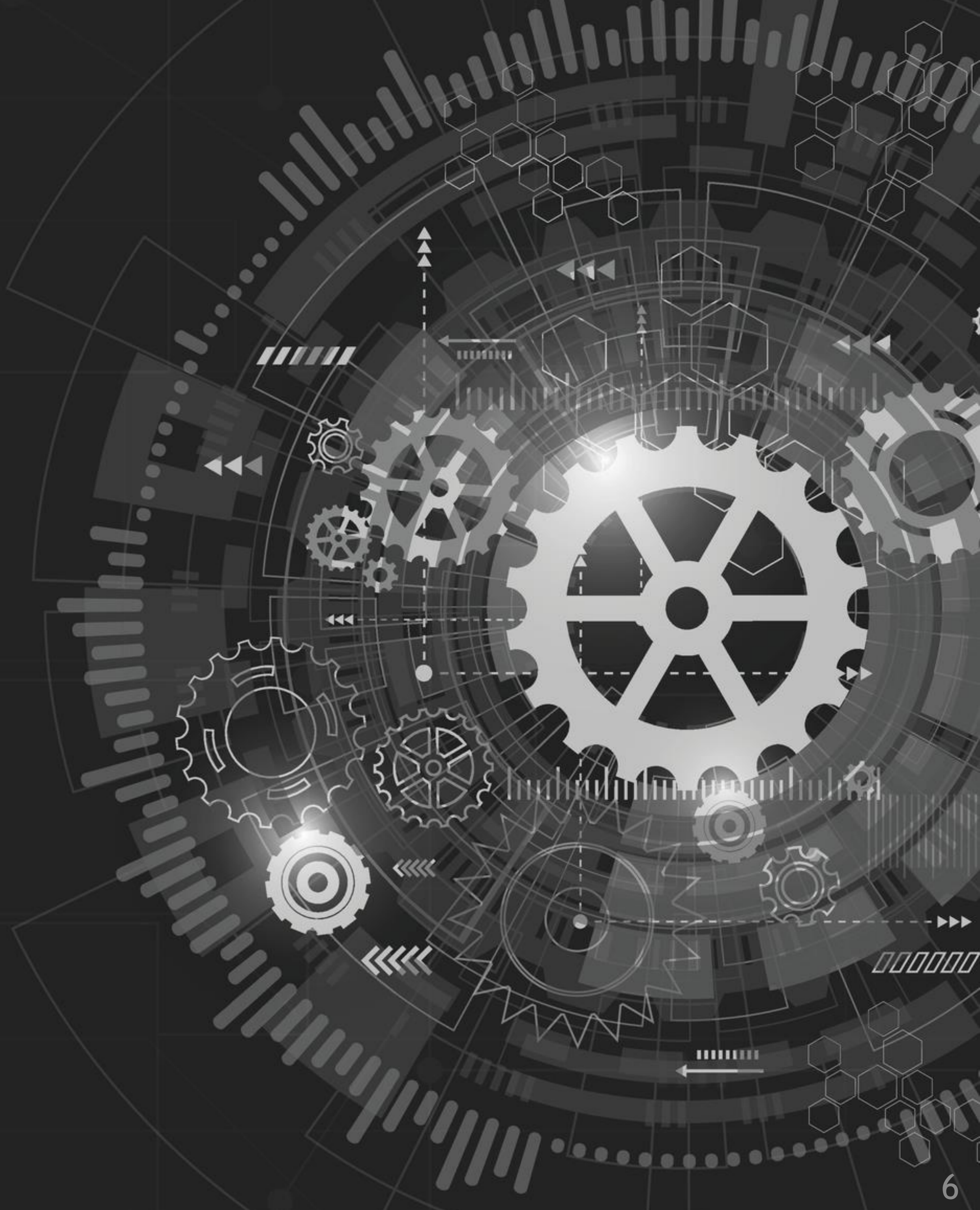


More Premium Ad Opportunities & Outcomes:

Stirs the consumer interaction and interest that drives business growth



Linear TV & OTT Dynamics



Within Video, Linear TV Is The #1 Reach and Engagement Vehicle

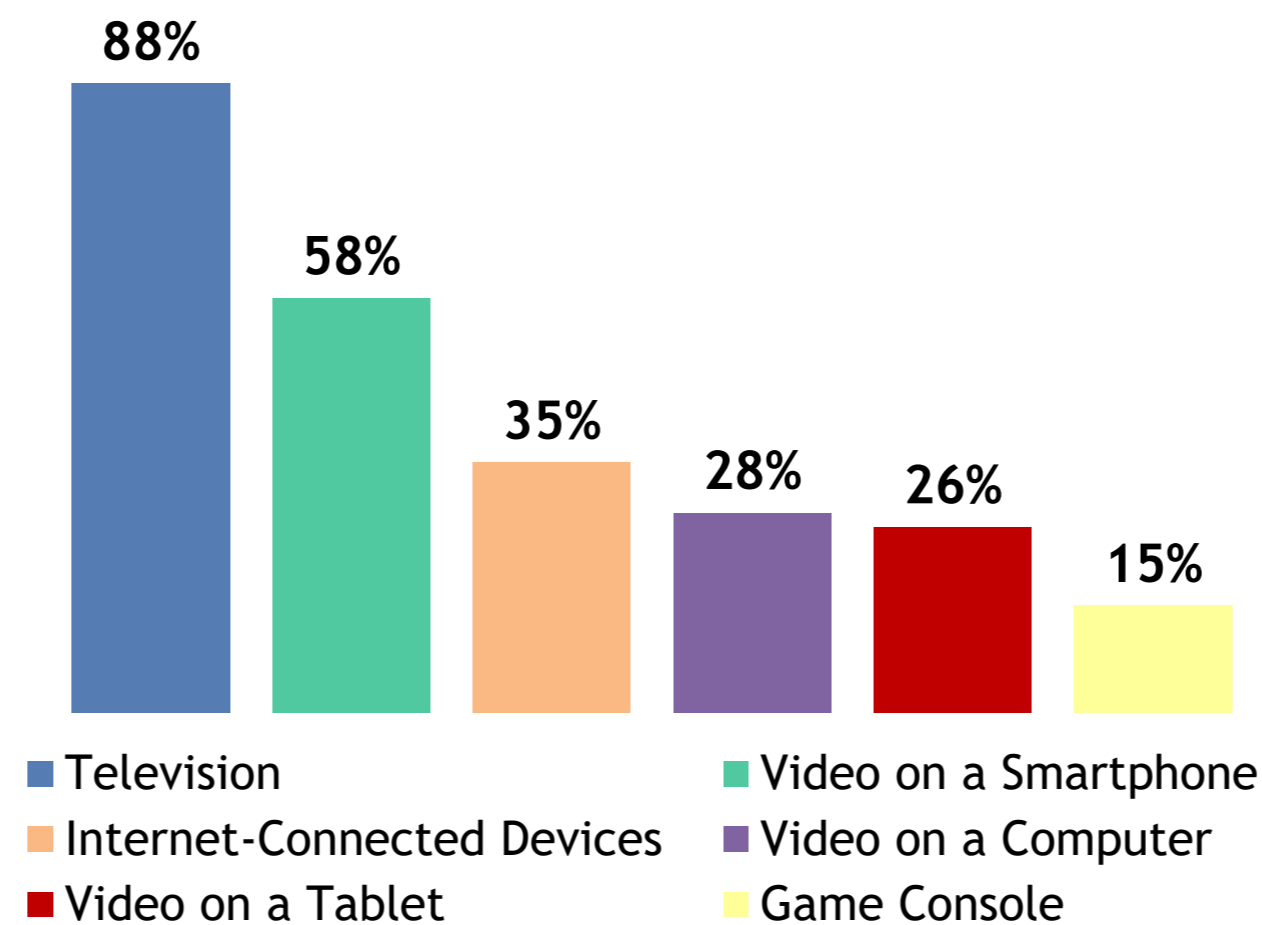
Most Consumers Receive TV Through An MVPD Subscription...

73%
of Homes are Multi-channel Subscribers



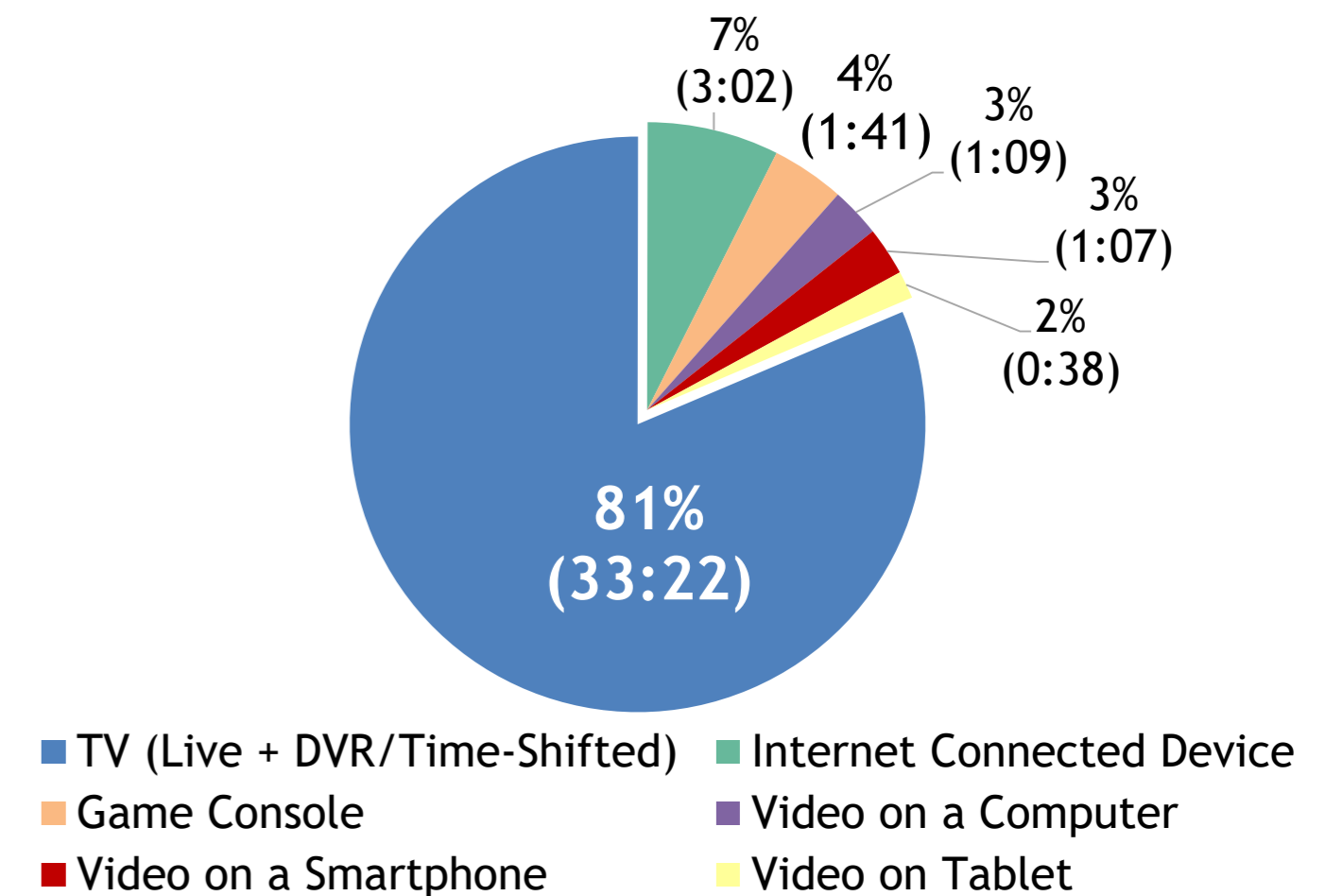
...And It Follows Then, That The Greatest Audience Reach Is Found In Linear TV...

Average Weekly Reach By Video Device
Adults 18+



...Driven By Their Linear MVPD Subscriptions, Consumers Dedicate The Majority Of Their Viewing **Time** To Linear TV

% Share of Weekly "Time Spent" by Video Device
Q1 2018, Adults 18+ (hrs:mins)



The reach and engagement in a premium, brand safe environment is why advertisers invest in ad-supported TV - over **\$64 Billion** in 2018

Source: 2018 S&P Global Market Intelligence, Kagan. As of June 2018: Multichannel HHS - Residential multichannel household count excludes DBS overlap created by households taking multiple multichannel subscriptions. Includes cable, DBS, telco and other multichannel platforms. Excludes commercial subs; Weekly Video Reach & Time Spent - Nielsen Total Audience Report, Q1 '18. Internet Connected Devices = Devices connected to the TV that are used to stream content such as Apple TV, Roku, Chromecast, Fire TV, Smartphone, Computers, etc.; MAGNA US Advertising Revenue Forecast - National TV + Local TV, September 2018, including cyclical events

At The Same Time, The Face Of Television Is Evolving



Proliferation of Viewing Devices

Watching premium multi-screen video



Over-the-Top



DVR/Time Shifting

VOD
(Set Top Box)



TV Everywhere
(MVPD authentication)



And We've Addressed This Expanding TV Ecosystem With In-Depth Insights



Proliferation of Viewing Devices



DVR/Time Shifting



TV Everywhere (MVPD authentication)

The convergence of **Consumer Demand + Technological Advancement** has resulted in more opportunities for consumers... and marketers



Over-the-Top



VOD (Set Top Box)



It's Clear That Many Consumers Have Expanded Their Viewing To Include Over-the-Top Platforms And Devices

Increased Access



Increased Interest



67% of Households now have access to an internet-enabled TV-connected device¹

An increase of **+10%** vs 2017

90% of Adults 25-34 stream video³

An increase of **+18%** vs. 2 years ago

Total time spent streaming OTT is up **28%** vs. YA⁵

38% of Households own an enabled Smart TV²

An increase of **+27%** vs. 2017

78% of Adults 35-49 stream video⁴

An increase of **+20%** vs. 2 years ago

73% of adults who watch streaming video say they watch *ad-supported* OTT video⁶

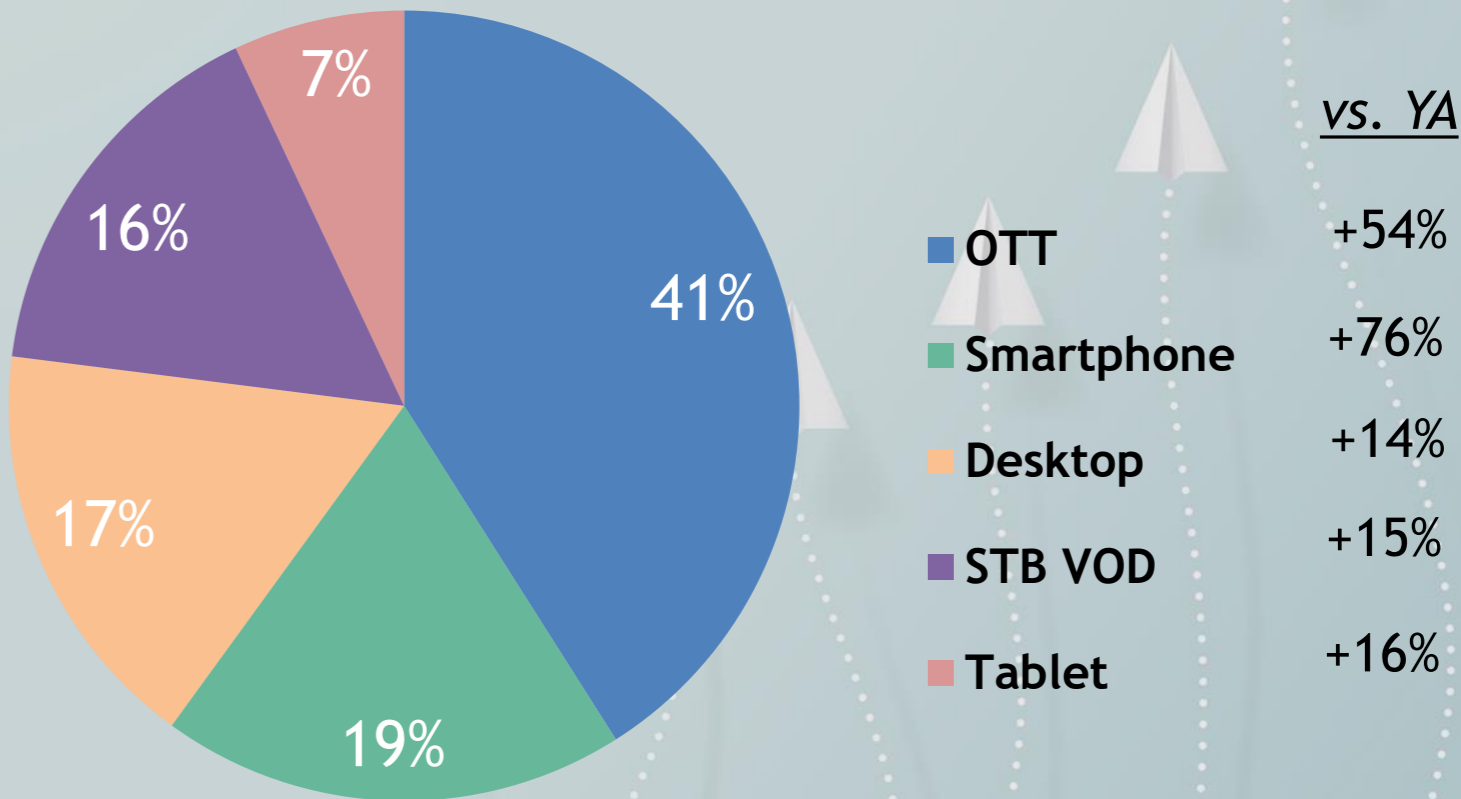
And So Savvy Marketers Have Begun To Follow Their Consumers Cross-Platform...

Ad spending on over-the-top TV is expected to increase **40%** to \$2B in 2018

62% of marketers now take an omni-channel, end-point agnostic approach to planning vs. only 29% just four years ago

Most digital ad views are now within OTT, which are double that of smartphones

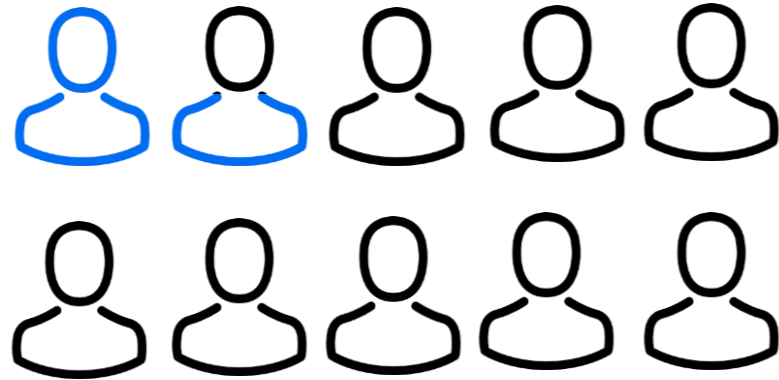
% of Digital Video Ad Views - Q2 2018
By Device



Sources MAGNA US Ad Revenue Forecasts, September 2018, 8/14/18; Nielsen CMO Report 2018 via Freewheel Q2 '18 Video Monetization Report; Ad View Composition and Growth by Device - Freewheel Q2 '18 Video Monetization Report

...But There Is Still Significant Opportunity For Marketers To Explore

only **15%**
of advertisers *regularly include*
connected TV in their media plans





**How Can A Plan Utilizing Linear TV + OTT
Deliver More To Marketers?**



More Viewer Engagement

Increased opportunity for viewer attention

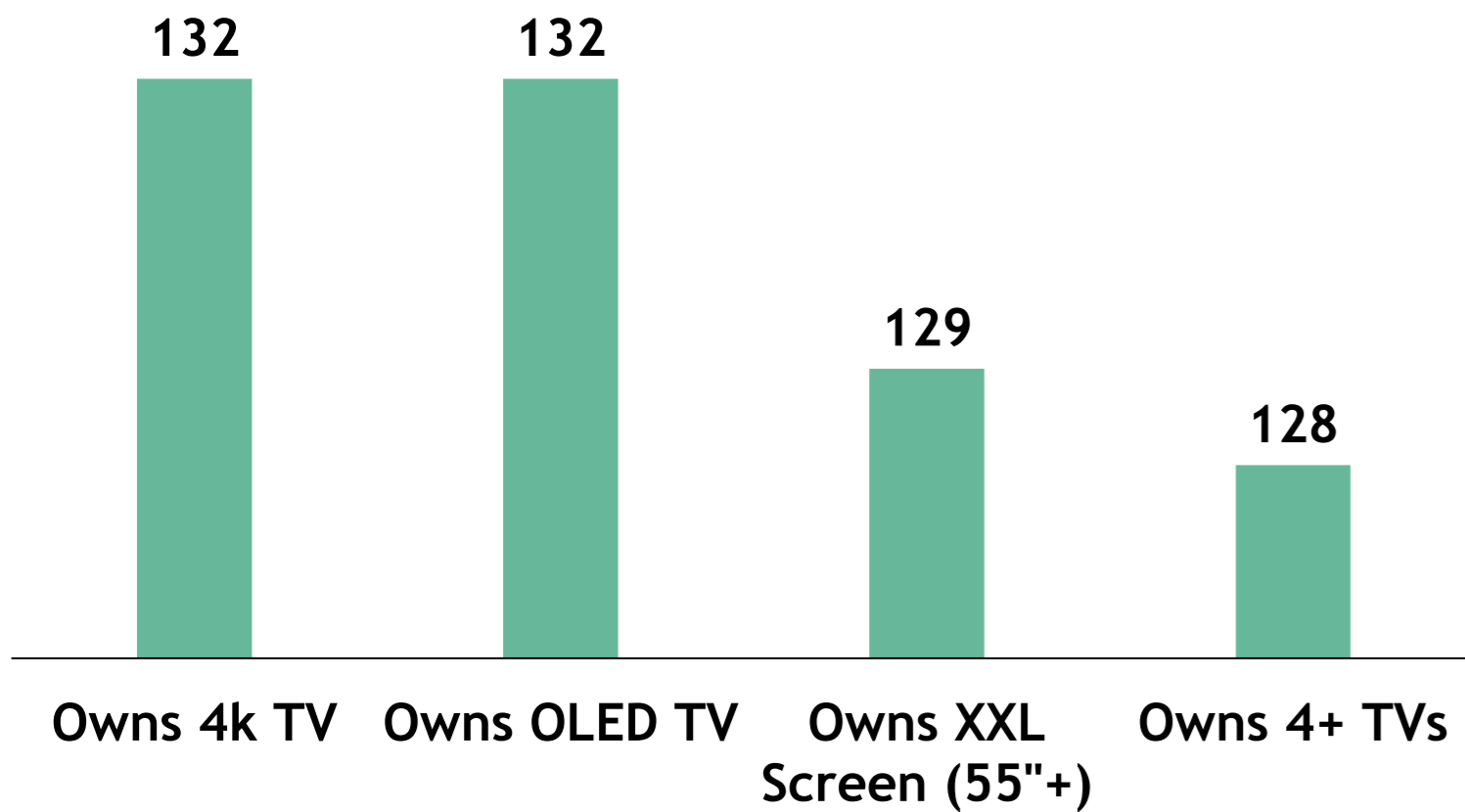
Viewers Who Watch Both Linear And OTT Television Are A More Committed, Engaged Audience Relative To The Average Adult

They are highly invested in their video viewing experience, so they are more likely to be attentive to it

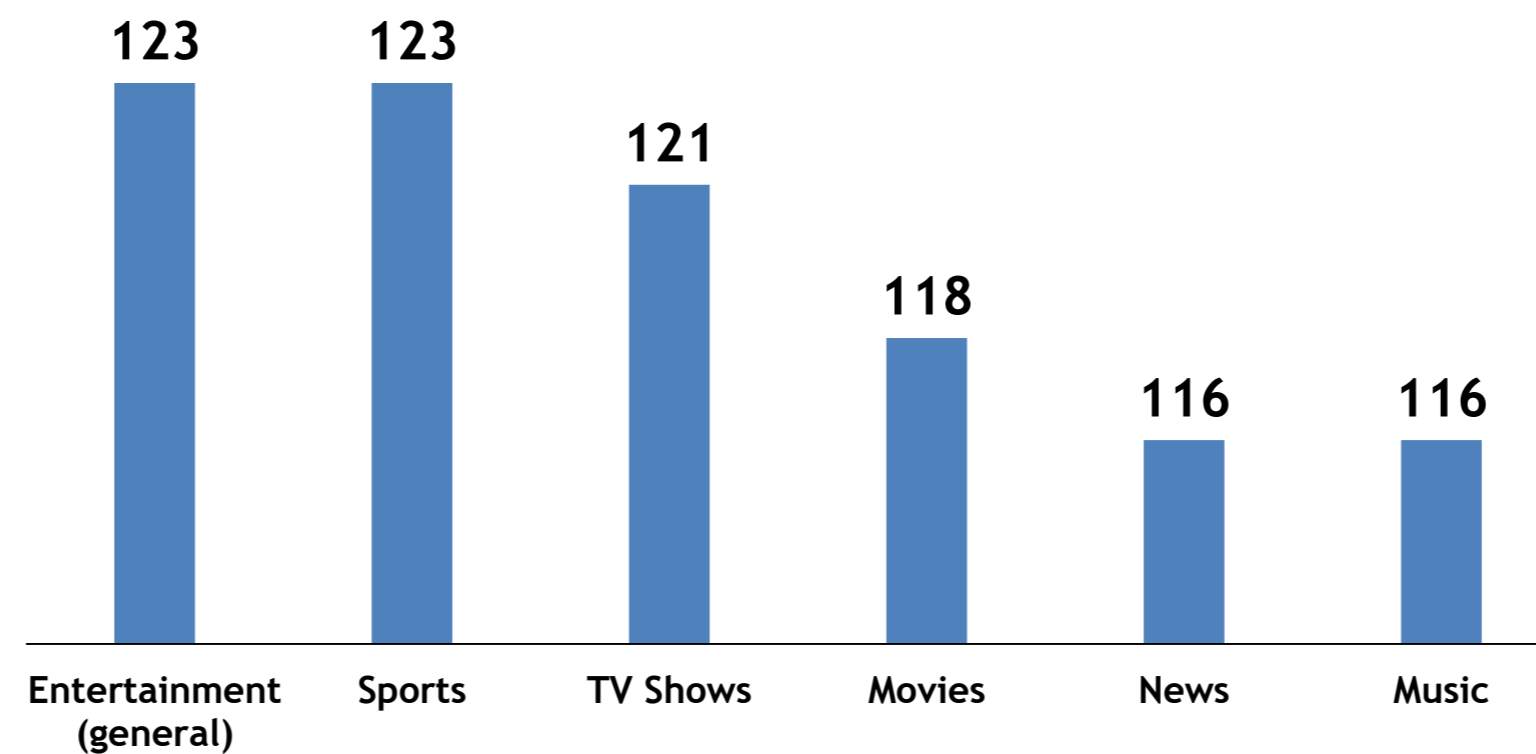
They are particularly knowledgeable and influential about entertainment, indicating they are more attentive, lean-in viewers to programming

They are attractive to advertisers as they consider themselves knowledgeable across a variety of product categories, making them opinion-makers and advocates

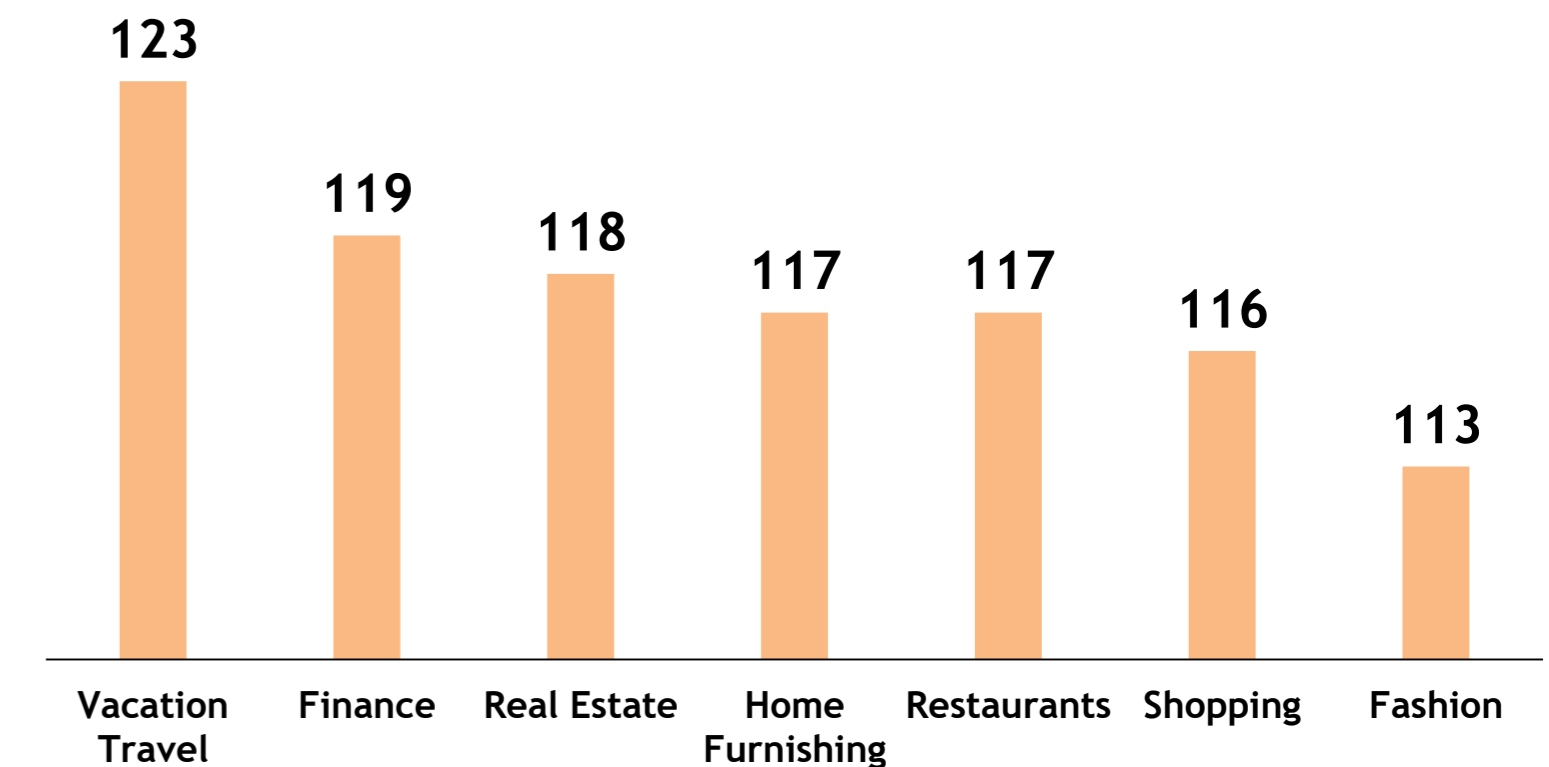
Linear + OTT viewer
Index vs. Average Adult



Linear + OTT viewer
“Category Influential” Index vs. Average Adult



“Category Influential”
Linear + OTT viewer - Index vs. Average Adult

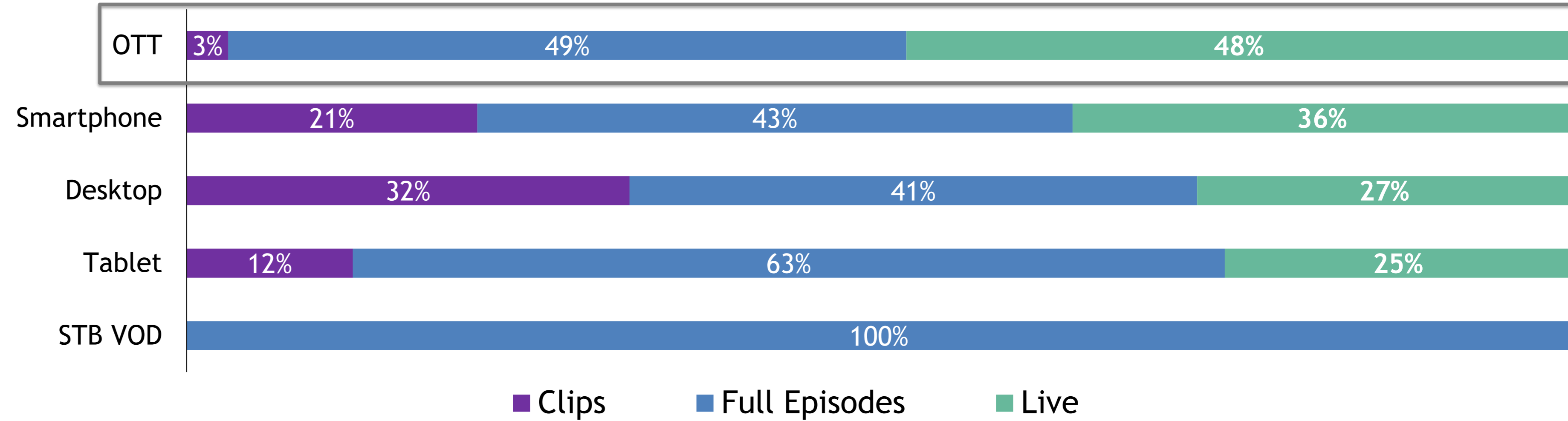


Source: 2018 GfK MRI Doublebase - ‘Linear TV Viewer + OTT Viewer’ = HH has a cable/telco/satellite subscription *and* owns Smart TV or Owns Internet Video Device or Watches video in one of the following ways - Through TV service provider app or Through a TV network app or via Another online streaming service; ‘Category Influentials’ = ‘I have a great deal of knowledge/experience in this topic’ and ‘My family/friends often ask for and trust my advice on this topic.’

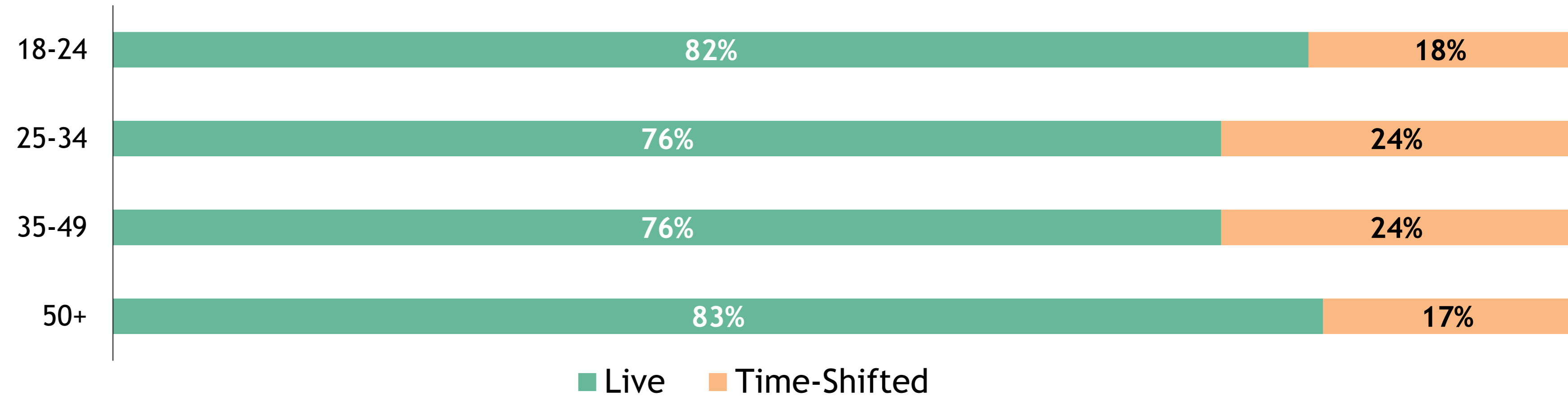
The Vast Majority of Linear TV and OTT Viewing is Long-Form and / or Live

As a Result, These Formats Increase the Opportunity for Engagement

Ad Views - Format Composition by Device



Linear TV - Live vs. Time-Shifted in *Primetime*



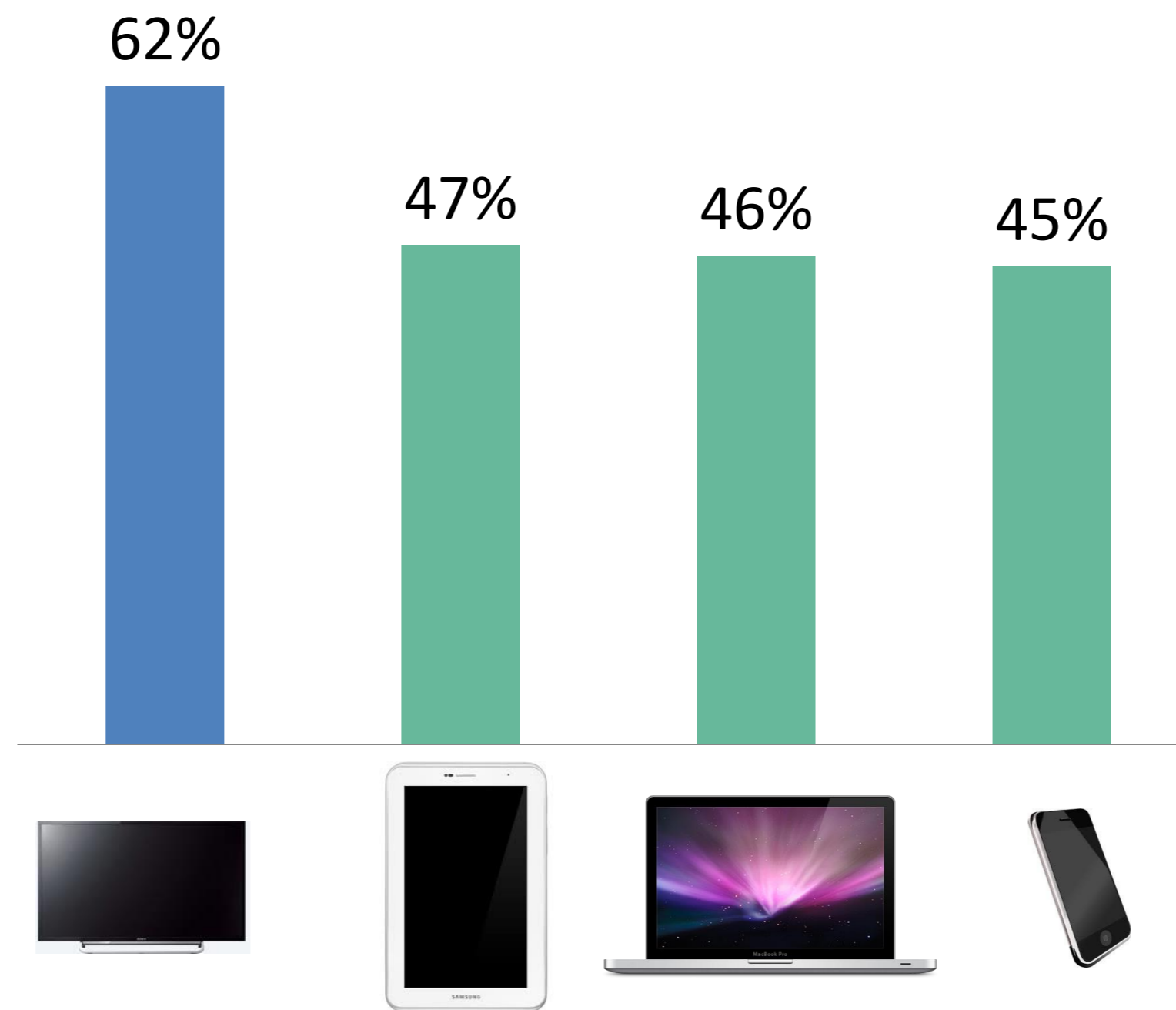
To Enhance Their
Viewing Experience,
They Prefer Enjoying
This Long-Form, Live
Content On A
Television Screen...

89% of adults “highly enjoy” viewing TV programs
on a Television

75% of Streamers prefer to watch OTT content on a
Connected TV than on a smartphone/tablet

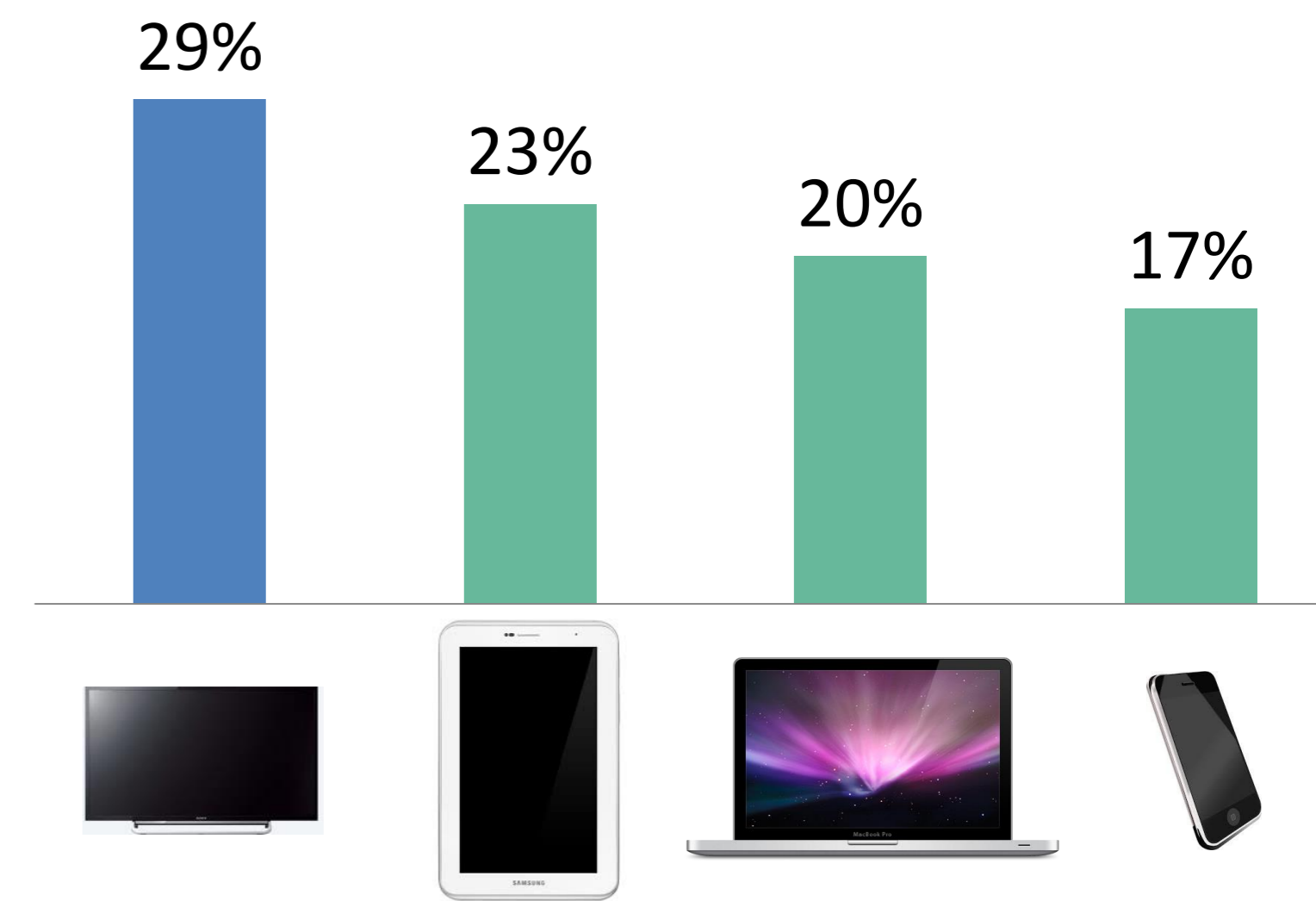
...Which Results in An Advertising Environment That Offers **Increased Attention** to Brands

Ad Recall



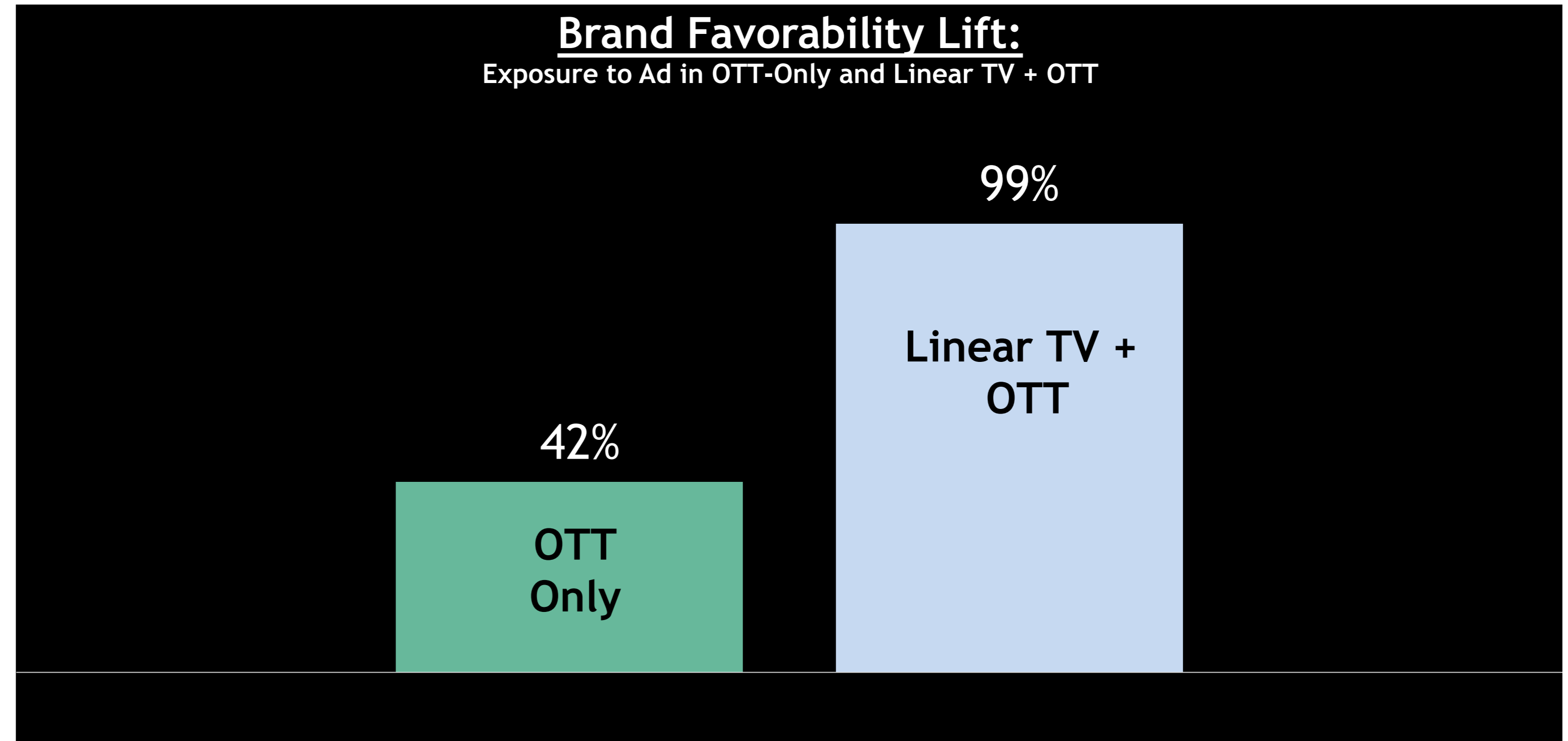
Ad Recall on a TV screen is +32% higher than next closest device

Attention Paid



Attention Paid to a TV screen is +26% higher than next closest device

In Fact, The
Combination Of
Linear + OTT Drives
Brand Health And
Advertising Impact



Viewing an ad on both platforms leads to more than **two-fold increase** in brand favorability lift

This Engagement Inspires Action

There is Strong Second-Screen Interaction for both Linear and OTT Content

29% of **Linear TV** viewers say their second-screen activity is completely or mostly related to the program or commercials

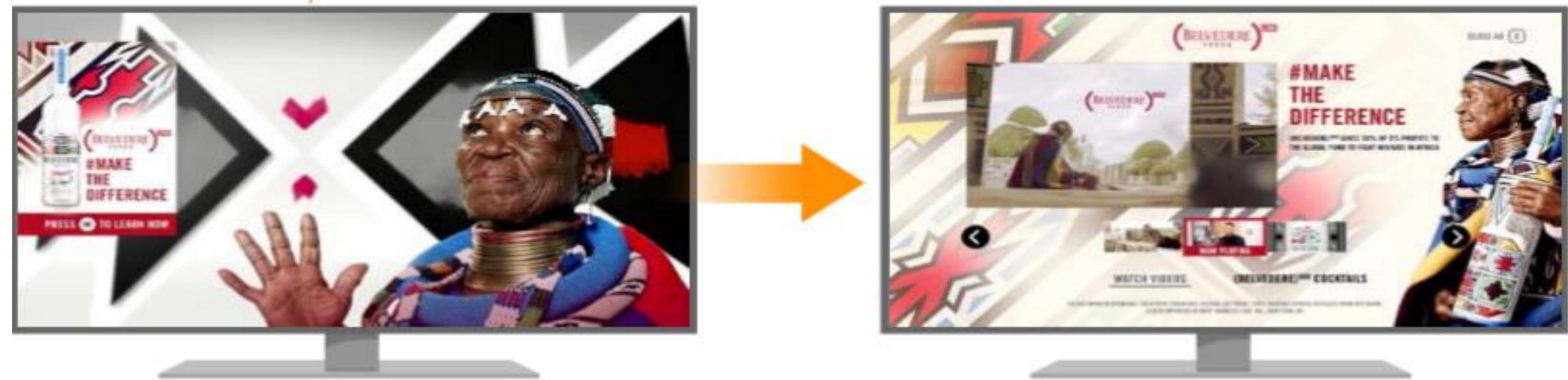
34% of **OTT Streaming** viewers say their second-screen activity is completely or mostly related to the program or commercials

86%

Viewers of
Ad-Supported OTT
Are Particularly
Receptive To
Advertising And Take
Action

56% like being able to interact with video ads
(vs. 39% for SVOD viewers)

36% use video ads to learn about new products /
brands / services
(vs. 30% for SVOD viewers)



Source: Ad Receptivity and the Ad-Supported OTT Video Viewers, IAB / Maru/Matchbox, Spot X, October 2018; Ad-Supported OTT: Those who watch video through a free streaming service with ads (e.g. Crackle, Pluto), through a vMVPD (e.g. DirecTV Now), through a streaming app that requires an MVPD login (e.g. WatchESPN, Xfinity), or through a streaming service charging a monthly fee with ads (e.g. Hulu with limited ads)

As A Result, Viewers
Are Much More
Engaged With
Connected TV Ads
Than With Ads
Online



Viewers spend an average of **2x** longer
engaging on connected TV vs. similar ads online



The Video Completion Rate for CTV is **25%** higher
than it is for Desktop and Mobile

More Engagement



Exposure to both linear TV and OTT drives brand favorability among consumers

The combination of Linear TV and OTT provides a synergy that increases consumer interaction, attention, and brand relevance

This deeper engagement drives strong lifts in brand health metrics when linear TV and OTT are deployed together





***More* Audience Reach and Reinforcement**

The combination of Linear + OTT extends campaign reach, reinforces message, and increases brand relevance with consumers

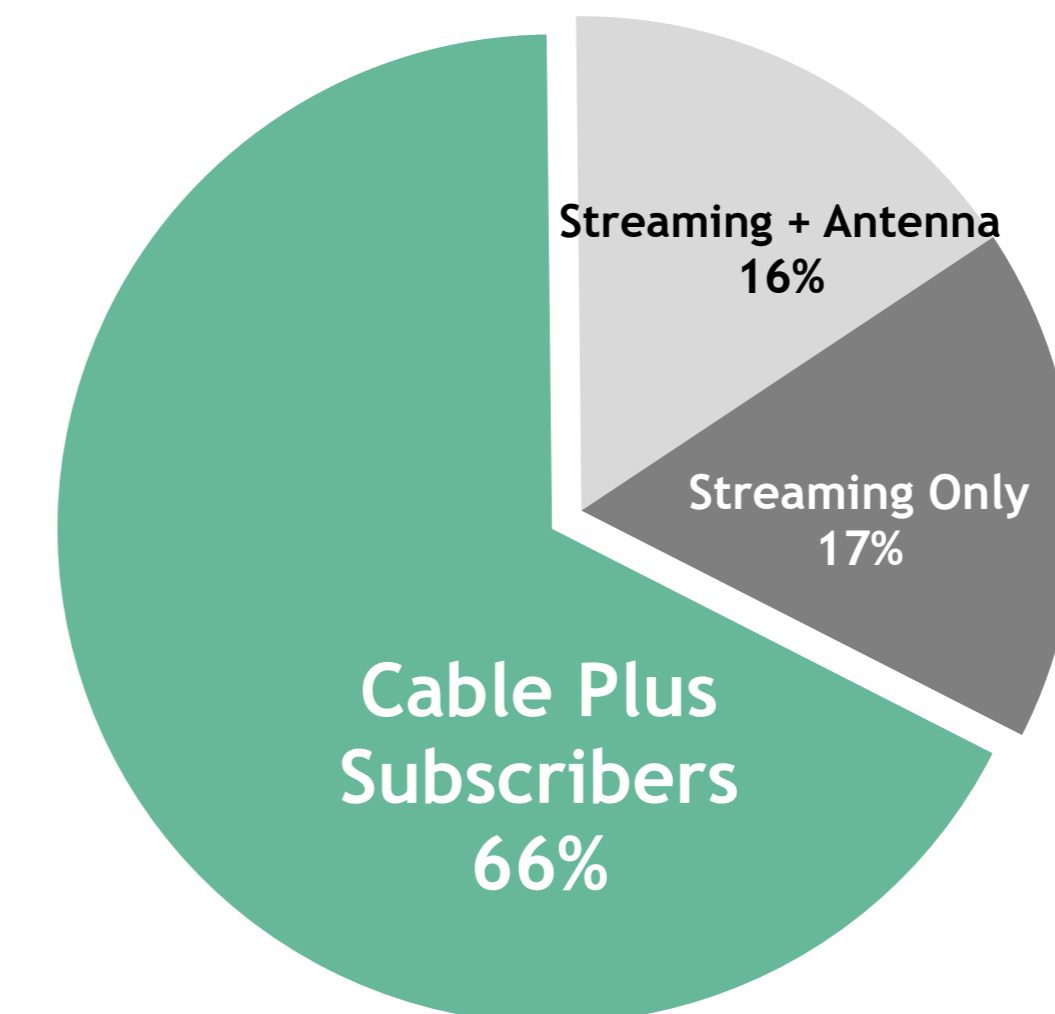
73% of U.S. households are Cable+ subscribers



...and **80%** of those cable HHs also watch video via streaming apps

Similarly, **66%** of OTT HHs also have Cable+ Subs

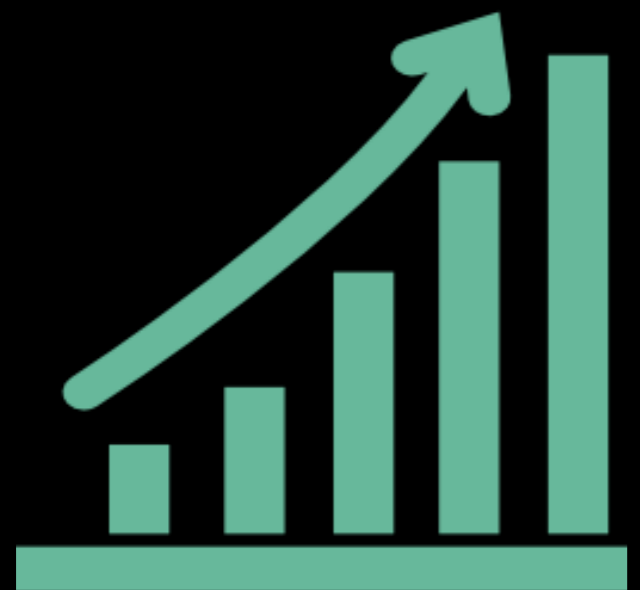
OTT Households



Strong Overlap
Between MVPD
Subscribers and OTT
Viewers Results In
Message Reinforcement

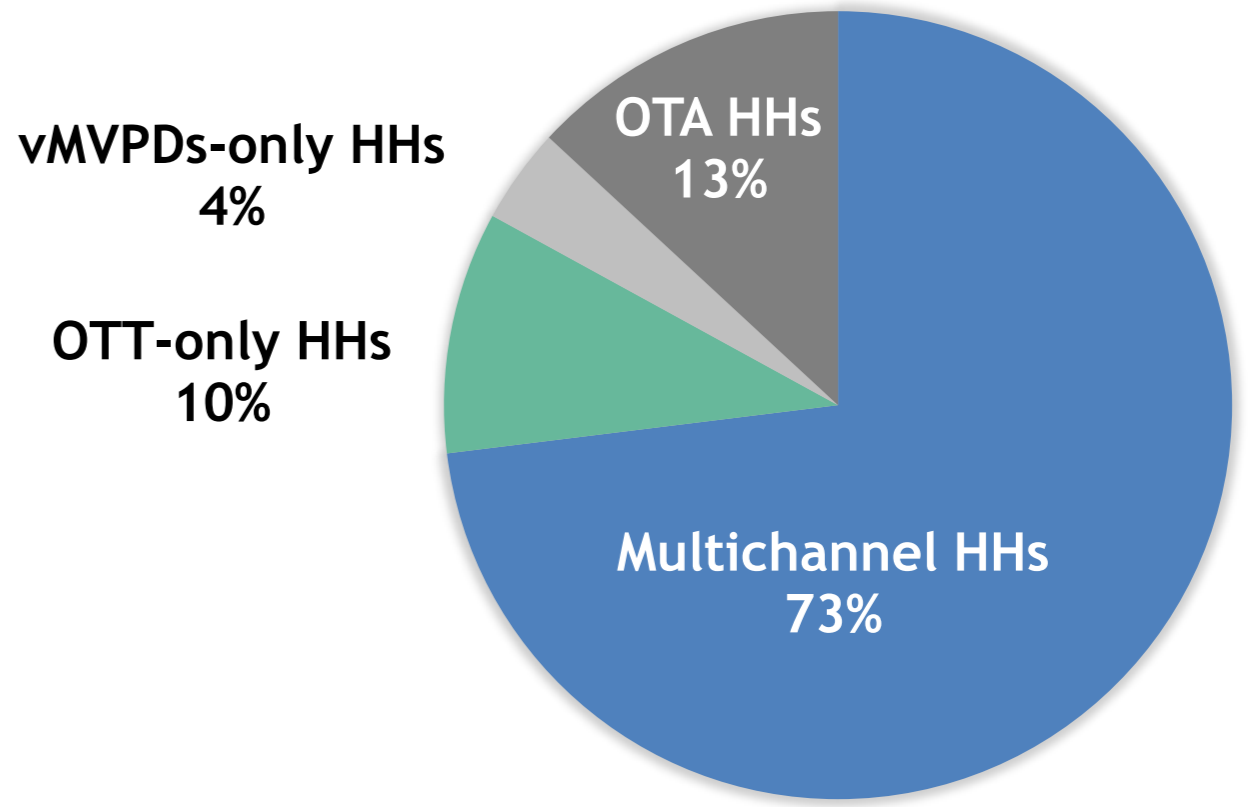


Additionally,
 Campaigns Can
 Deliver **Incremental**
Reach Of OTT-only
 Homes
 (no MVPD subscription)



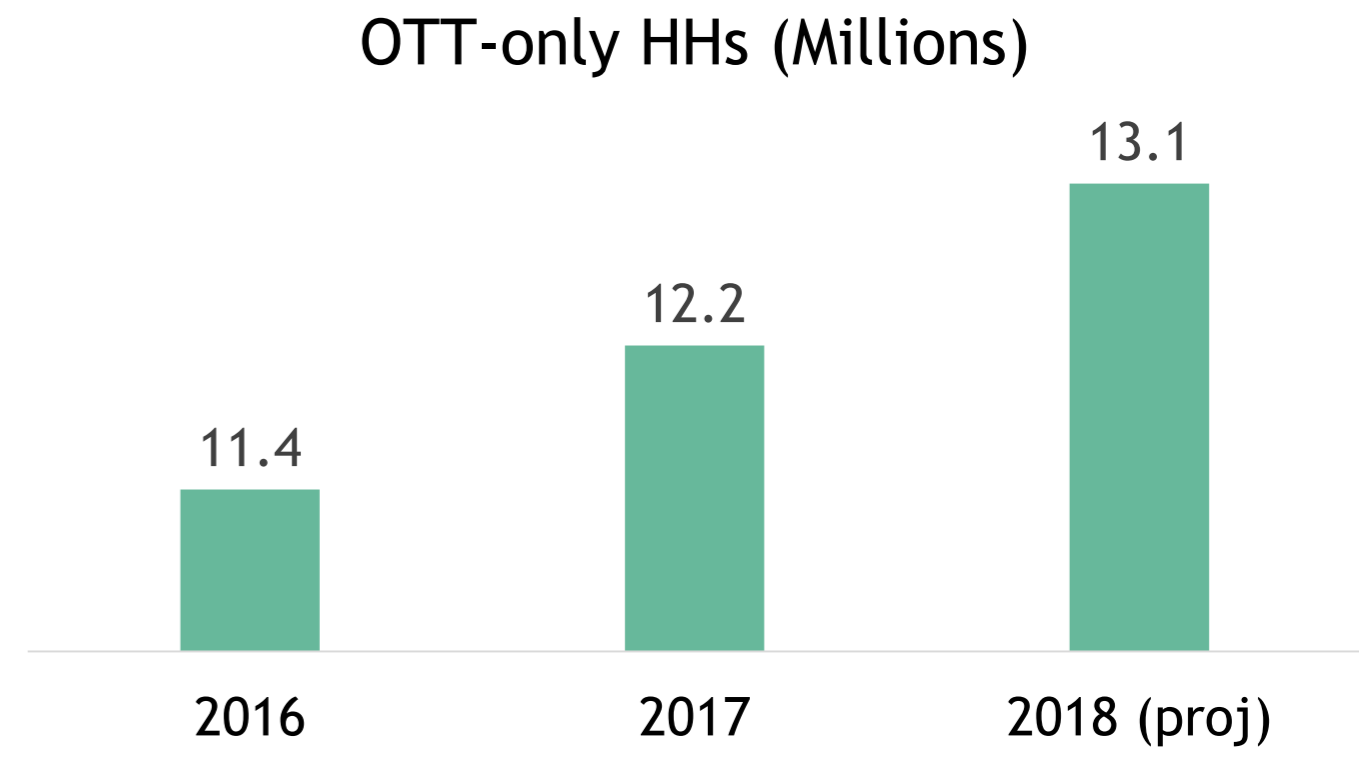
While MVPD subscriptions dominate, OTT-only homes comprise **10%** of video HHs

Video HH Method of Delivery
 2018



While a small segment of total US HHs, OTT-only homes are growing (+15% over the last 2 years)

Video HH Method of Delivery Projection
 OTT-only growth trend, 2016-2018



Source: 2018 S&P Global Market Intelligence, Kagan. As of June 2018.
 (1) Multichannel HHs - Residential multichannel household count excludes DBS overlap created by households taking multiple multichannel subscriptions. Includes cable, DBS, telco and other multichannel platforms. Excludes commercial subs. (2) Online video-only households (OTT or multichannel substitutes) are HHs that rely on unmanaged broadband delivery to view television shows or movies in lieu of a traditional multichannel subscription. Figure does not include subscribers to virtual multichannel providers such as Sling TV, PlayStation Vue or DIRECTV NOW. (3) Virtual multichannels (vMVPD) characterized by unmanaged (Internet/OTT) broadband delivery of aggregated live, linear networks and on-demand content similar to a traditional multichannel offering for a monthly subscription. (4) Households that receive broadcast network signals using an antenna and do not subscribe to a traditional or virtual multichannel service, includes HHs with an antenna that also access online video.

Quantifying The Opportunity For Incremental Reach And Message Reinforcement

We examined Nielsen's omni-channel planning tool, Media Impact, to gauge the potential incremental reach of OTT within a plan.

This analysis includes all ad-supported TV networks and streaming platforms except Amazon and Netflix, the two biggest SVOD platforms. Through this cross-platform analysis, we can determine the percentage of an audience that can be reached by:

Linear TV Only
Primary Reach Driver

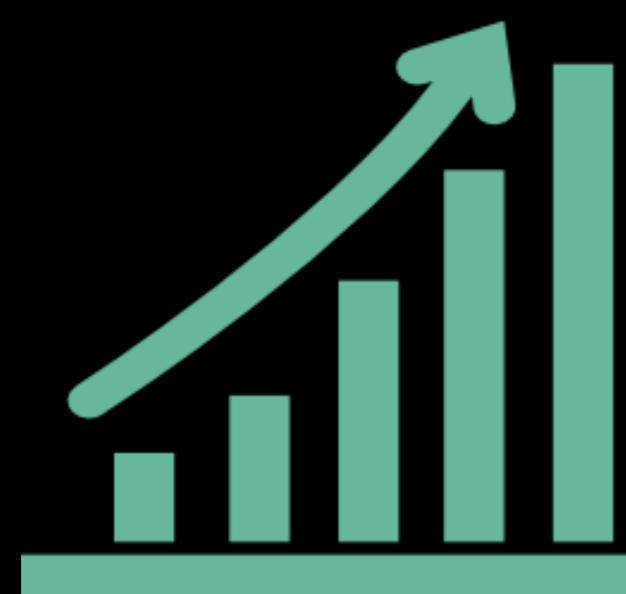
Those reached *only* with Linear TV

Linear TV + OTT
Reinforcement & Relevance Opportunity

Those reached with *both* Linear TV and OTT

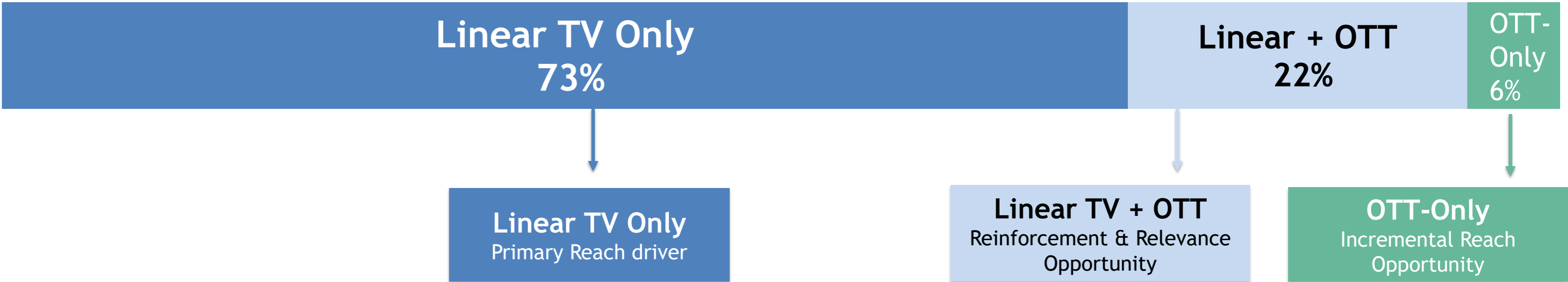
OTT-Only
Incremental Reach Opportunity

Those reached *only* with OTT



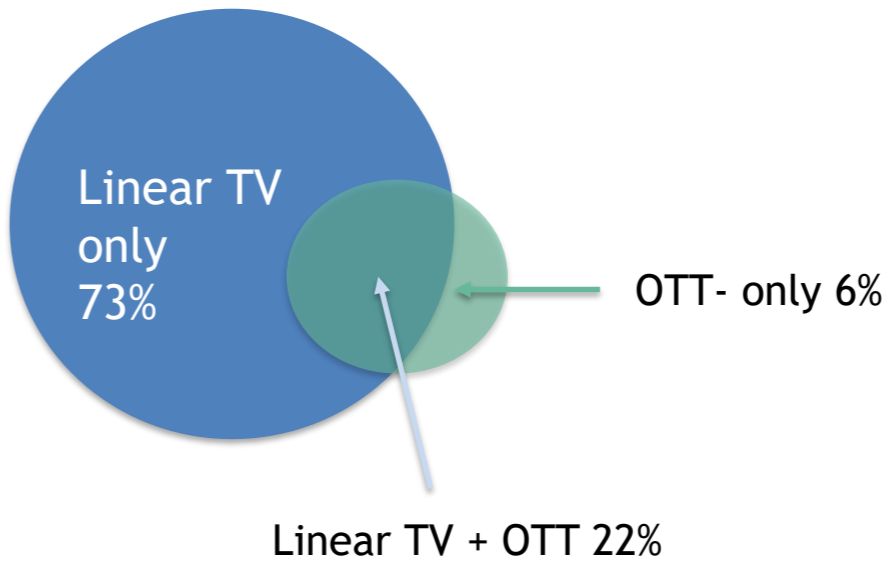
The data below for Adults 18+ indicates that 73% of reach is derived from linear TV alone, 22% is derived from those reached by a combination of linear TV + OTT, and 6% is derived from those reached by the OTT-alone

Reach Duplication, Adults 18+
Linear TV, Linear TV + OTT, OTT-only

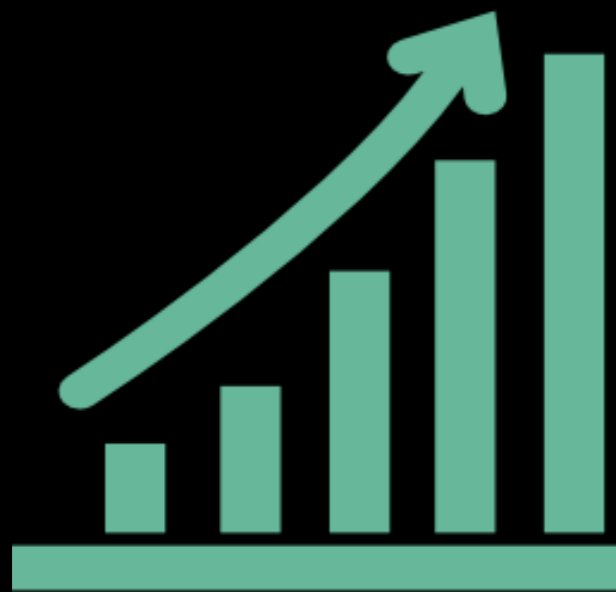


Reach duplication expressed another way:

Reach Duplication - Adults 18+



Analysis Applied:
Quantifying The
Opportunity For
Incremental Reach And
Message Reinforcement

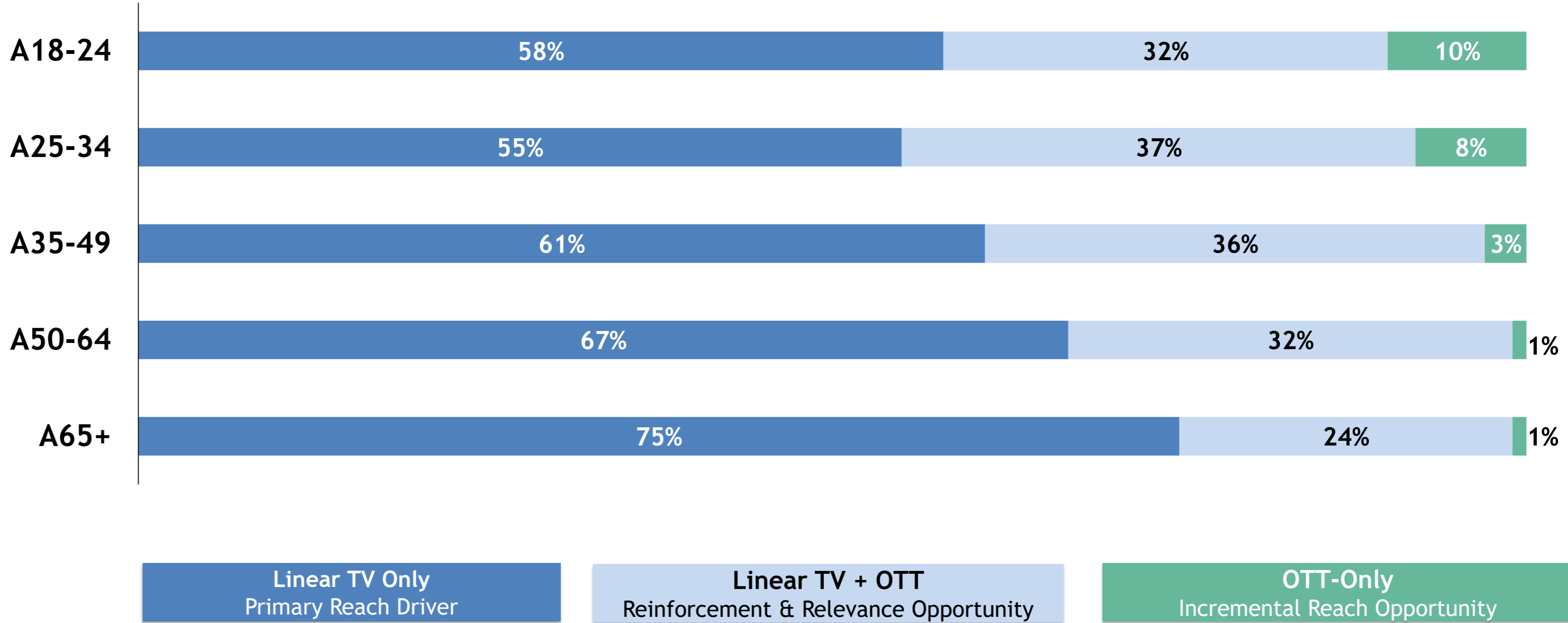


Source: Nielsen Media Impact; A18+. 4/1-4/30/18, Linear TV = Include Cable and Broadcast TV Programs, Live viewing plus 7 days after the broadcast; OTT = Desktop and laptop video streaming, does not include the two major subscription (non-ad supported) video platforms, Netflix and Amazon; TV + OTT = those reached on OTT and Linear TV

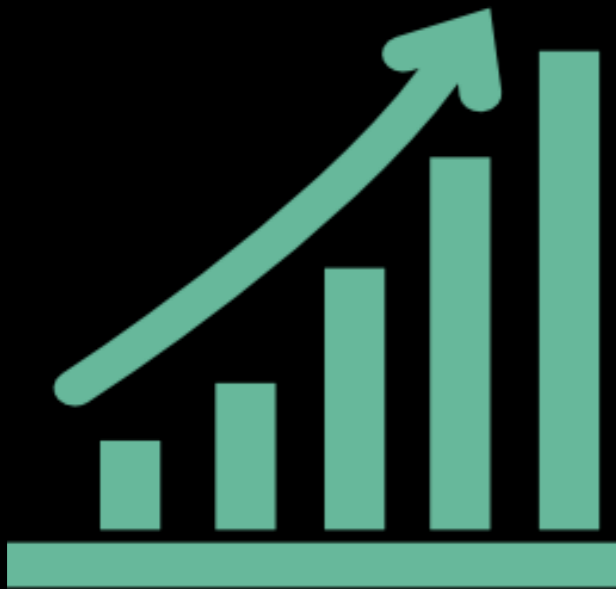
While the vast majority of reach is achieved through Linear TV, OTT provides an opportunity to drive incremental reach, as well as message reinforcement cross-platform

Reach Duplication, by Demo

Linear TV, Linear TV + OTT, OTT-only

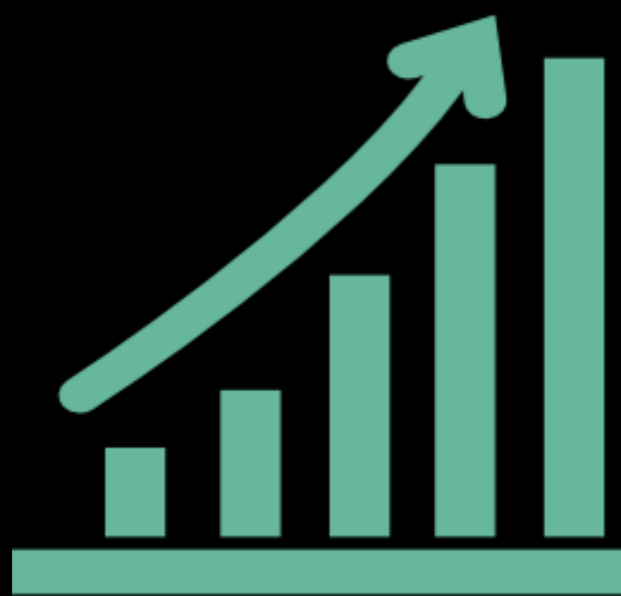


The Analysis Confirms That An OTT Schedule Delivers Incremental Audience Across Buying Targets, Particularly Younger Demos

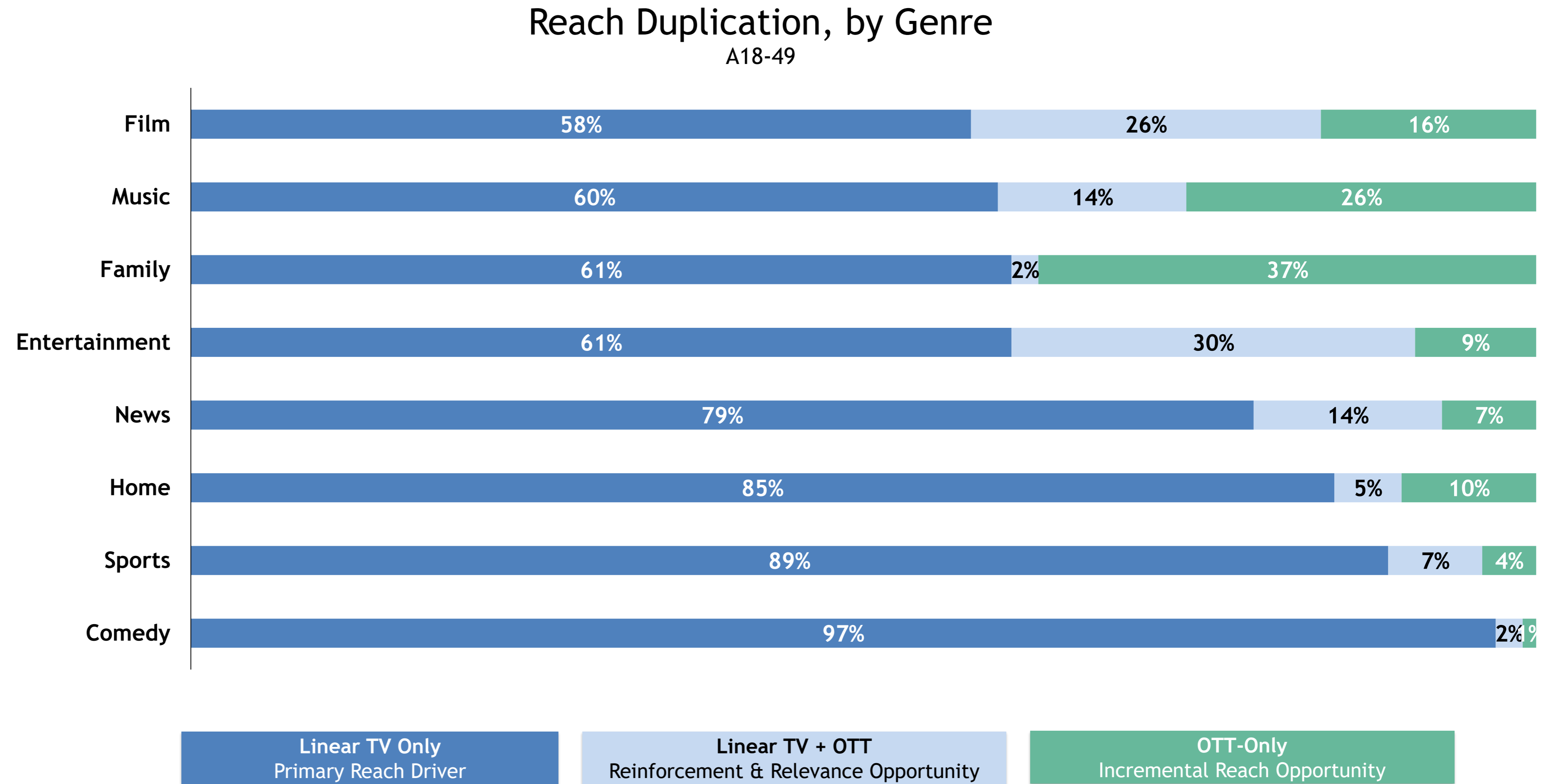


Source: Nielsen Media Impact; A18+. 4/1-4/30/18, Linear TV = Include Cable and Broadcast TV Programs, Live viewing plus 7 days after the broadcast; OTT = Desktop and laptop video streaming, does not include the two major subscription (non-ad supported) video platforms, Netflix and Amazon; TV + OTT = those reached on OTT and Linear TV

Similarly, Plans Inclusive Of OTT Can Deliver Additional Audiences Across A Variety Of Content Genres, Particularly Within *Family, Music, and Film Content*



While all genres offer some degree of incremental reach, the opportunities are varied. Music and Family content offer the most, while Comedy, Sports, and News genres are more limited in their ability to drive unique audiences.



Source: Nielsen Media Impact; A18+. 4/1-4/30/18, Linear TV = Include Cable and Broadcast TV Programs, Live viewing plus 7 days after the broadcast; OTT = Desktop and laptop video streaming, does not include the two major subscription (non-ad supported) video platforms, Netflix and Amazon; TV + OTT = those reached on OTT and Linear TV. Each genre includes tv networks and websites that are included in that subject area.



A Closer Look At
Three Consumer
Segments Where A
Supplementary
Layer Of OTT Can
Expand Reach

Millennials

(A18-34)

Largely digital natives open to
adopting new devices and
methods of viewing

**Households with
Children**

Their on-the-go lifestyle and need
for a diverse set of programming
demands connectivity options

**Affluent
Households**

(HHI \$100K+)

They own it all.
Time-pressed, they want the
most choice & convenience

Millennials

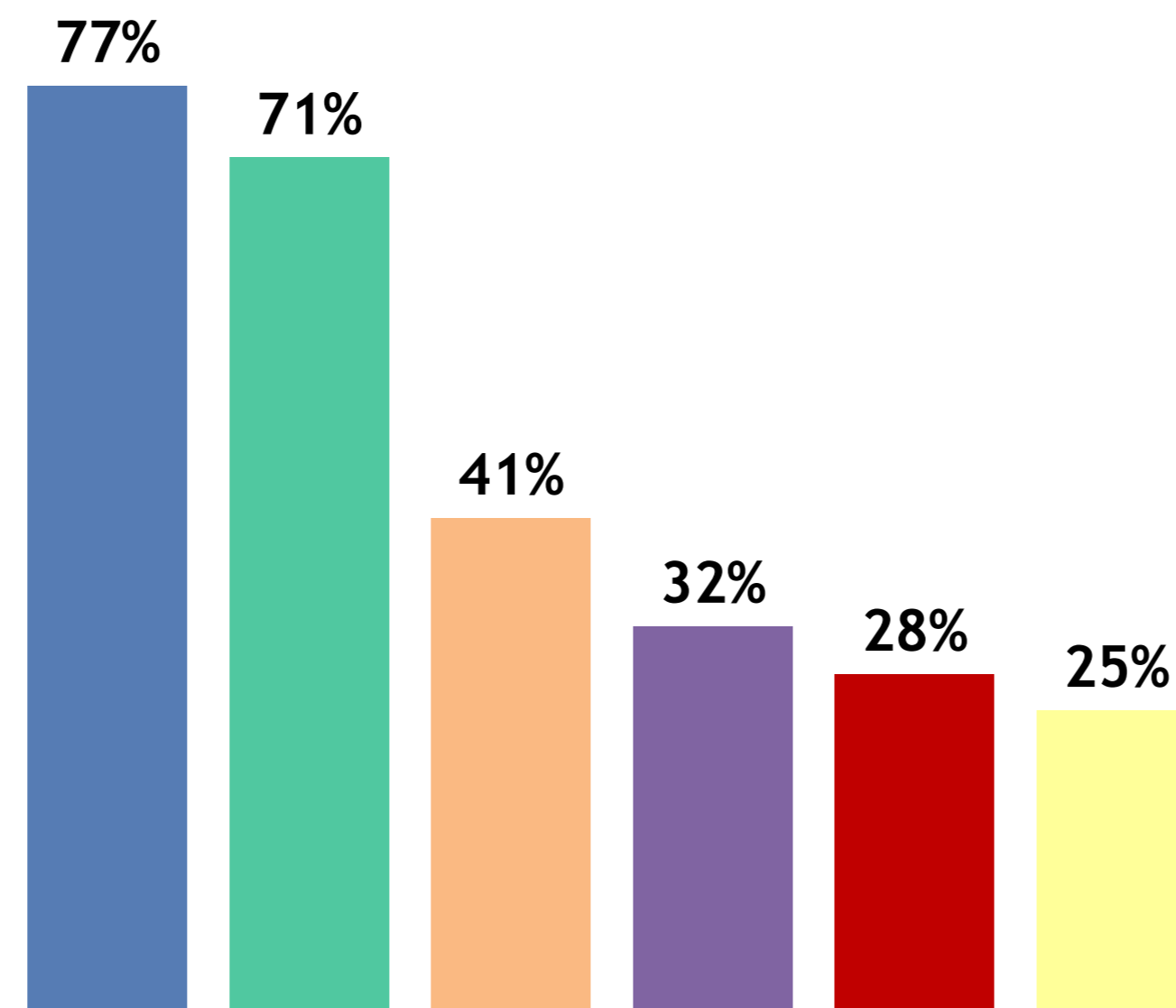
Millennials are reached in greater numbers on **linear TV** than other methods of video viewing, however they are more likely than the average adult to be streaming video using connected devices

Though they devote the **majority** of their video viewing to **linear TV**, younger audiences spend over 12 hours a week watching video on alternate devices

Although Linear TV Is Their Preferred Way Of Watching Video, Millennials Spend A Significant Amount Of Time With OTT Viewing

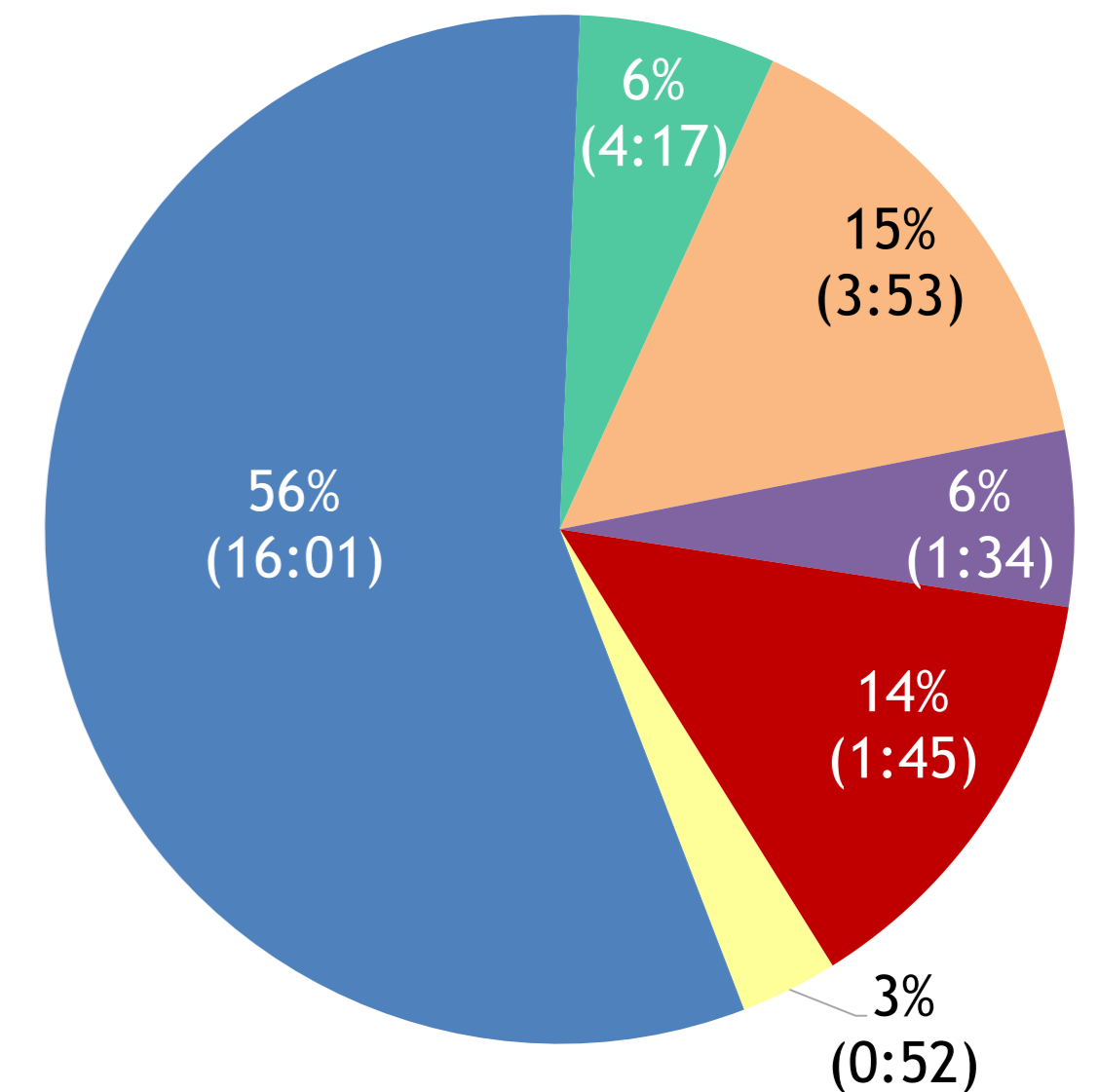


Average Weekly Reach by Video Device
A18-34



- Television (Live + DVR/Time-Shifted)
- Video on a Smartphone
- Internet-Connected Devices
- Video on a Computer
- Game Console
- Video on a Tablet

% Share of Weekly "Time Spent" by Video Device
A18-34



- Television (Live + DVR/Time-Shifted)
- Video on a Smartphone
- Internet Connected Device
- Video on a Computer
- Game Console
- Video on Tablet

Source: Nielsen Total Audience Report, Q1 '18, Internet Connected Devices =Devices connected to the TV that are used to stream content such as Apple TV, Roku, Chromecast, Fire TV, Smartphone, etc

Millennials

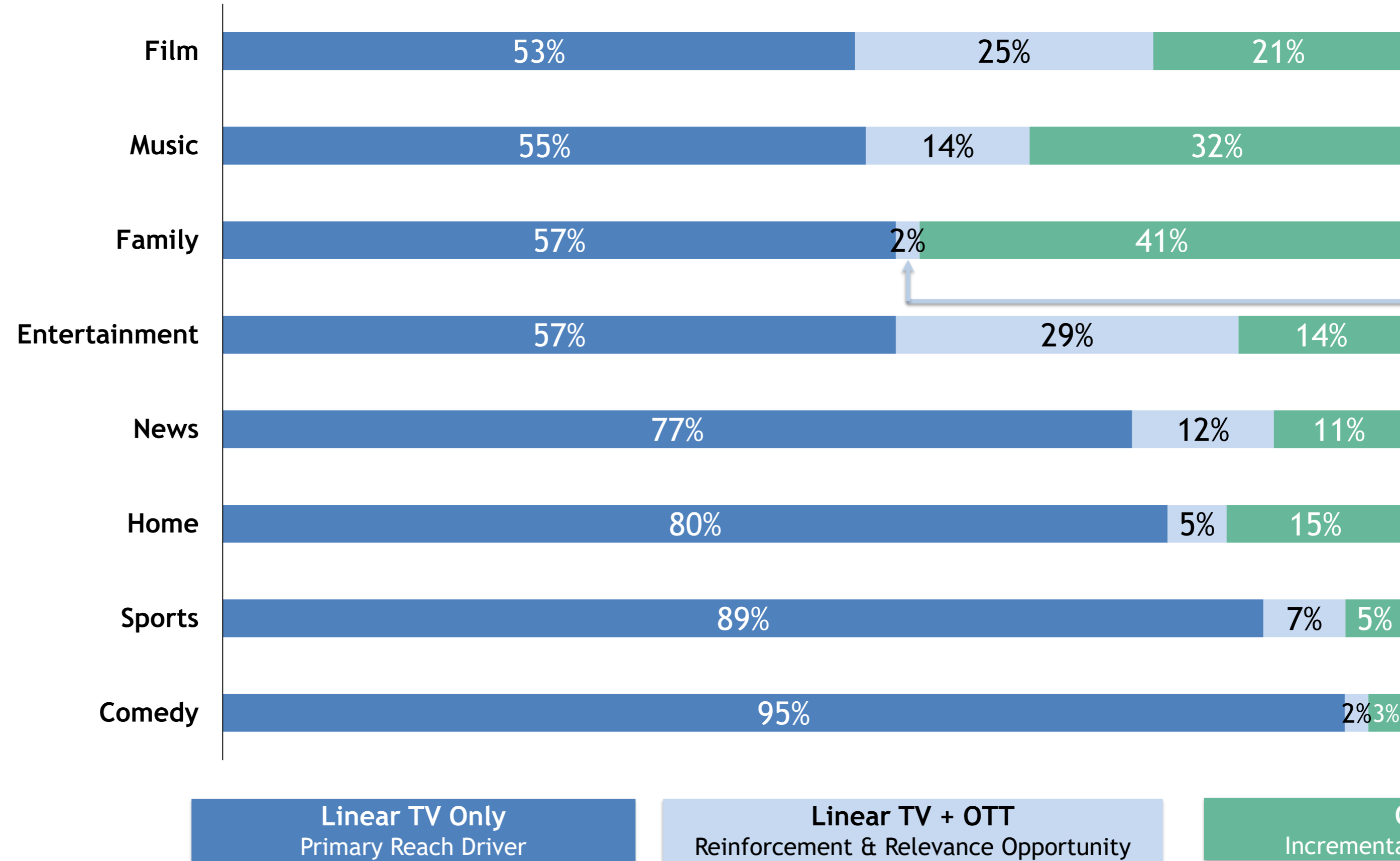
A Supplementary OTT Schedule Provides An Incremental Reach Opportunity For Millennials

36% of Adults 18-34 can be reached via OTT-alone or in combination with Linear TV; 13% via OTT-only



A custom analysis of the reach delivered by ad-supported TV vs. video streaming platforms (excluding Netflix and Amazon) demonstrates the incremental reach potential of Millennials.

Reach Duplication, by Genre
A18-34



There is particular incremental opportunity within *Family*, *Music*, and *Film* genres, reflective of their lifestyle and interests.

Given the minimal overlap in audiences watching family programming on *both* TV and OTT, ad-supported OTT programming helps brands extend reach and relevance to Millennial parents/families.

Source: Media Impact; A18+. 4/1-4/30/18 Linear TV = Cable and Broadcast TV Programs, Live viewing plus 7 days after the broadcast; OTT = Desktop and laptop video streaming, does not include the two major subscription (non-ad supported) video platforms, Netflix and Amazon TV + OTT = those reached on OTT and Linear TV. Each genre includes digital sites and tv networks that are found within that genre.



What Are They Watching When They Stream?

64% of Millennial Streamers Look For Shows Previously Watched or Listened to on “Traditional” media

Source: Nielsen Total Audience Report, Q1 '18, “traditional media” includes television and radio

Households with Children

Households with Children Are Heavier Viewers of OTT Content



Households with kids are **38%** more likely to stream OTT content than households without children

Streaming households with children spend **42%** more time viewing OTT content than streaming HHs without kids

36% of HHs with children said they streamed *more* content in the last year (via network app / website / streaming service)
+29% more than HHs without kids

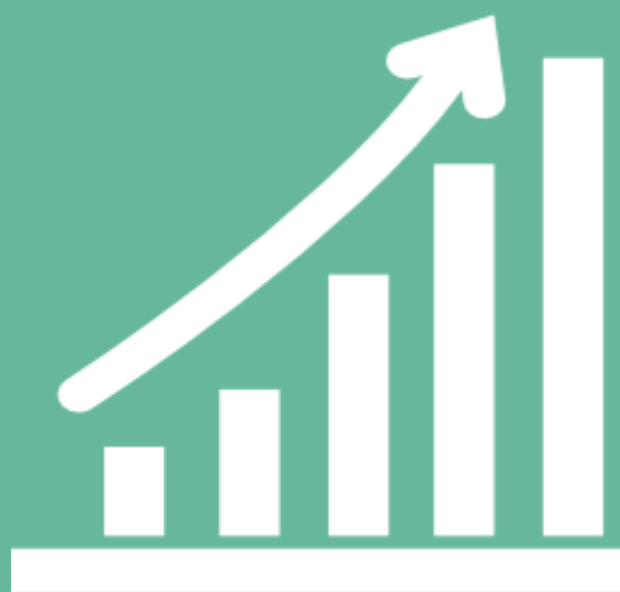


Households with children have spending power: 21% of households with kids spend \$700+/month on their debit cards, **38% higher** than households without children

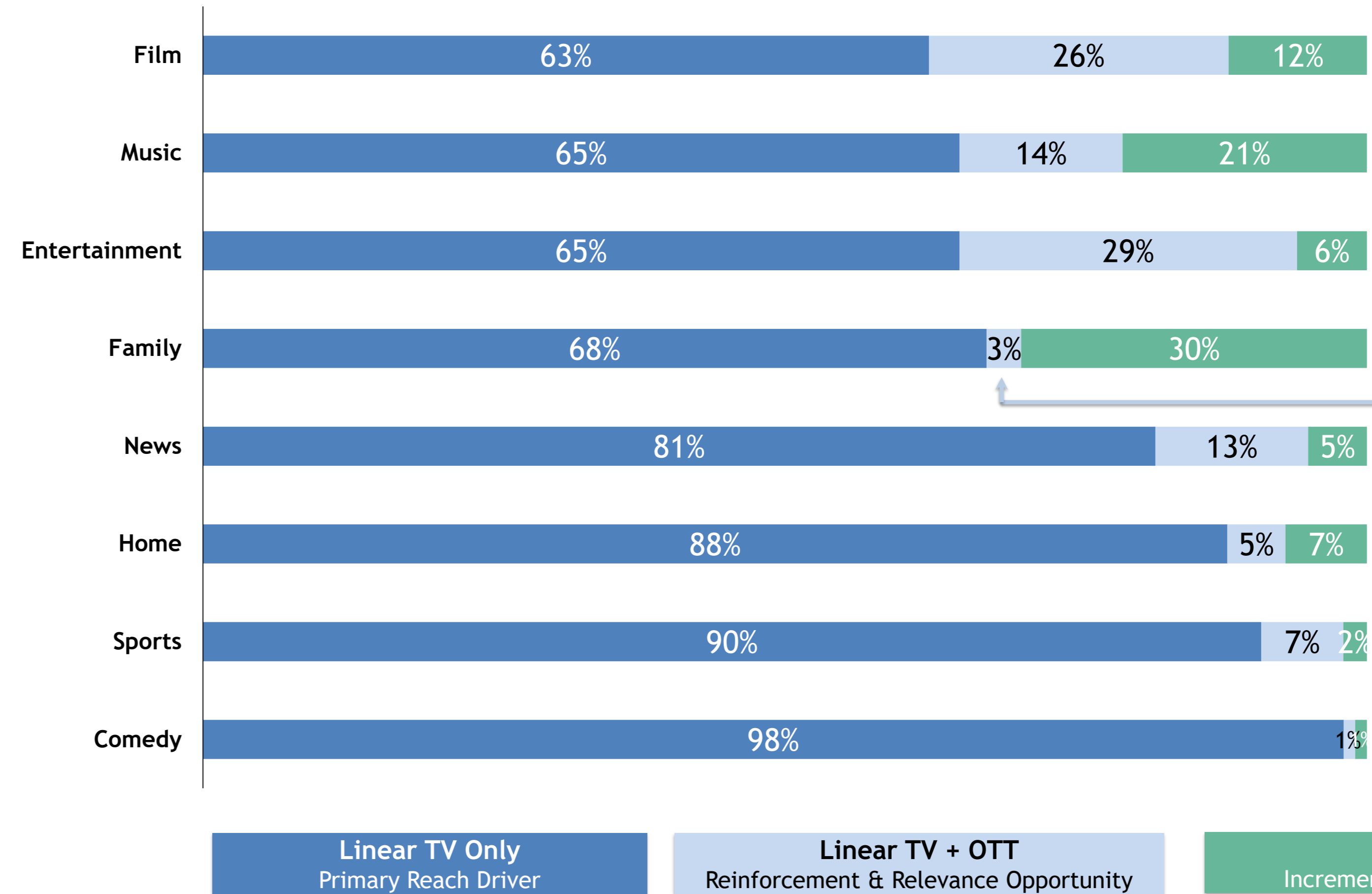
Households with Children

Busy Families Demand The Flexible Entertainment Options That OTT Provides

38% of HHs with children can be reached via OTT-alone or in combination with Linear TV



Reach Duplication, by Genre (Households with Kids)



A custom analysis of the reach delivered by ad-supported TV vs. video streaming platforms (excluding Netflix and Amazon) demonstrates opportunity to reach and reinforce message among households with kids.

Not surprisingly, they rely upon OTT for family entertainment, as well as for programming that suits parents, such as Film and Music.

Given the minimal overlap in audiences watching family programming on both TV and OTT, ad-supported OTT programming helps brands increase their reach and relevance with families.

Source: Media Impact; A18+. 4/1-4/30/18, Linear TV = Cable and Broadcast TV Programs, Live viewing plus 7 days after the broadcast; OTT = Desktop and laptop video streaming, does not include the two major subscription (non-ad supported) video platforms, Netflix and Amazon. TV + OTT = those reached on OTT and Linear TV.; Each genre includes digital sites and tv networks that are found within that genre.

Affluent Households

They own it all.

Time-pressed, they want the most **choice & convenience**



While the majority of Affluent HHs (74%) have an MVPD subscription, they are **20%** more likely than the average HH to *also* have OTT streaming capabilities

They are significantly more likely than the average HH to own Connected TV Devices:

Smart TVs +**35%**, Apple TV +**87%**, Roku +**40%**, Google Chromecast +**51%** vs. the average HH

They are **10%** more likely than the average household to have streamed *more* content last year

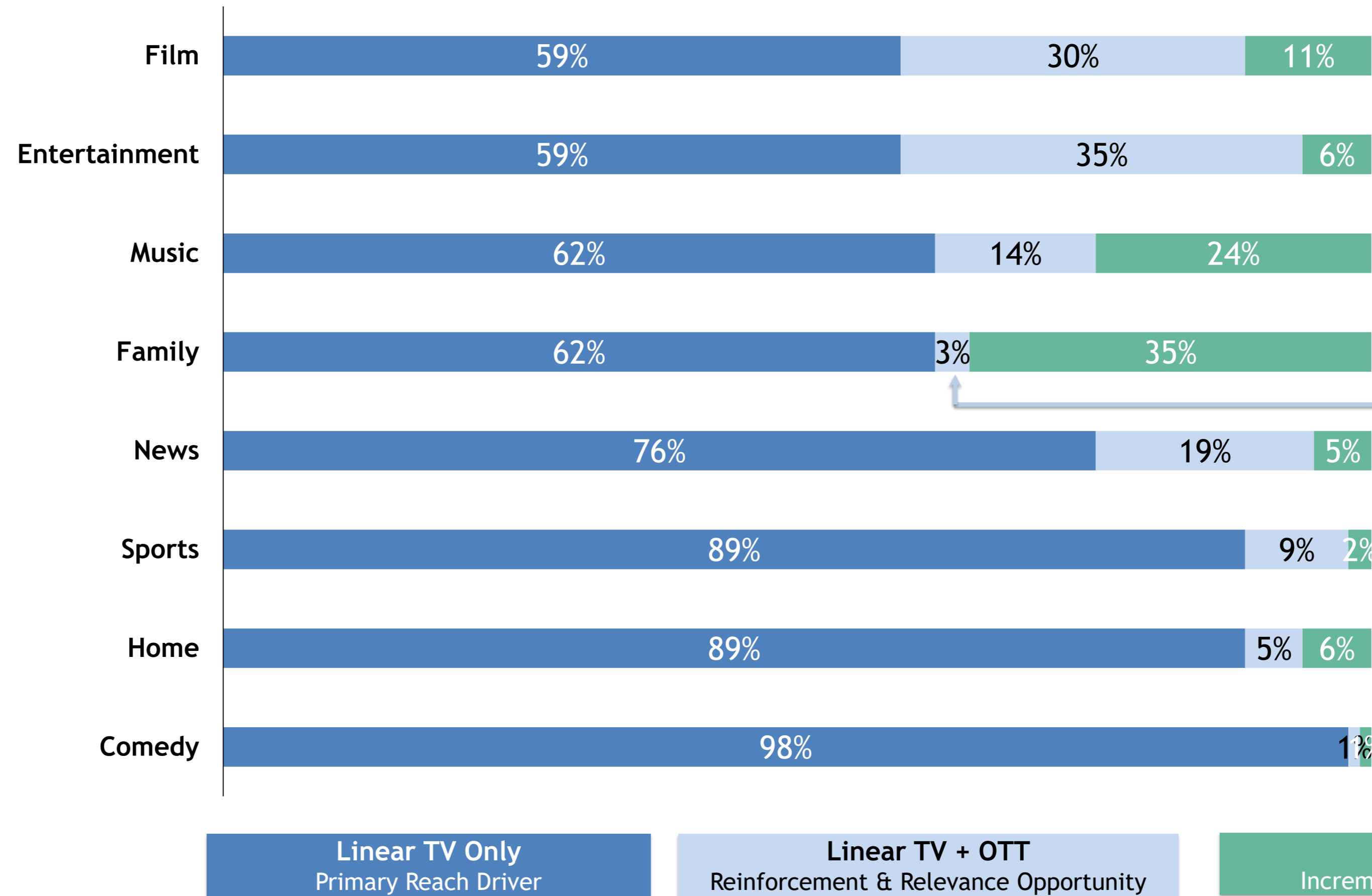
Affluent Households

Their Ability To Own A Variety of Devices, Coupled with Demands on Their Time, Results In A Significant Supplementary Reach Opportunity

44% of Affluent HHs can be reached via OTT-alone or in combination with Linear TV



Reach Duplication, by Genre (Affluent HHs)



A custom analysis of the reach delivered by ad-supported TV vs. video streaming platforms (excluding Netflix and Amazon) demonstrates opportunity to reach and reinforce message among affluent households.

As Affluent HHs are 15% more likely to have children at home (vs. the average HH), family programming shows strong OTT viewership. Similarly, film and music are also opportunity areas as they are top Affluent interests.

Similar to the Millennial and HHs with Kids audiences, the Affluent show minimal overlap in watching family programming on both TV and OTT. An OTT buy will extend reach and brand-relevance among the Affluent.

Source: Media Impact; A18+. 4/1-4/30/18 Linear TV = Cable and Broadcast TV Programs, Live viewing plus 7 days after the broadcast; OTT = Desktop and laptop video streaming, does not include the two major subscription (non-ad supported) video platforms, Netflix and Amazon. TV + OTT = those reached on OTT and Linear TV. Each genre includes digital sites and tv networks that are found within that genre.

More Reach



As the majority of HHs hold MVPD subscriptions, linear TV remains to be the primary video reach driver across audiences.

However, OTT represents a growing reach opportunity as more consumers have access to, and interest in, viewing OTT. Coupled with linear TV, it offers incremental plan reach, message reinforcement, and increased brand-relevance to consumers.

A complementary schedule in OTT programming provides additional exposure to groups likely to stream OTT content such as Millennials, the Affluent, and Households with Children, as well as across several targeted content areas like family, music, and film programming.





More Premium Ad Opportunities & Outcomes

Deeper consumer engagement creates greater interest and intent

Ad-Supported OTT is Simply An Extension Of The Premium, Engaging, 100% Verifiable, Brand-Safe Content Embraced By Advertisers On Linear TV

hulu

black-ish THIS IS US The Good Place
 Empire Rick and Morty
 ELEMENTARY NEW AMSTERDAM
 LAW & ORDER SPECIAL VICTIMS UNIT
 GREY'S ANATOMY

Roku

abc HELL'S KITCHEN ALL STARS
 NEWS The Restoration Man
 dead like me THE DRESDEN FILES

vudu

ARRESTED DEVELOPMENT
 THE SIMPSONS THE NIGHT MANAGER
 SMALLVILLE
 THE WEST WING

YAHOO! VIEW

modern family AMERICAN NINJA WARRIOR EXPERIENCE
 SOUTH PARK BOB'S BURGERS
 ORVILLE THE

SONY CRACKLE

Seinfeld
 Welcome to the Family RESCUE ME
 MARRIED WITH CHILDREN NITRO CIRCUS

tubi

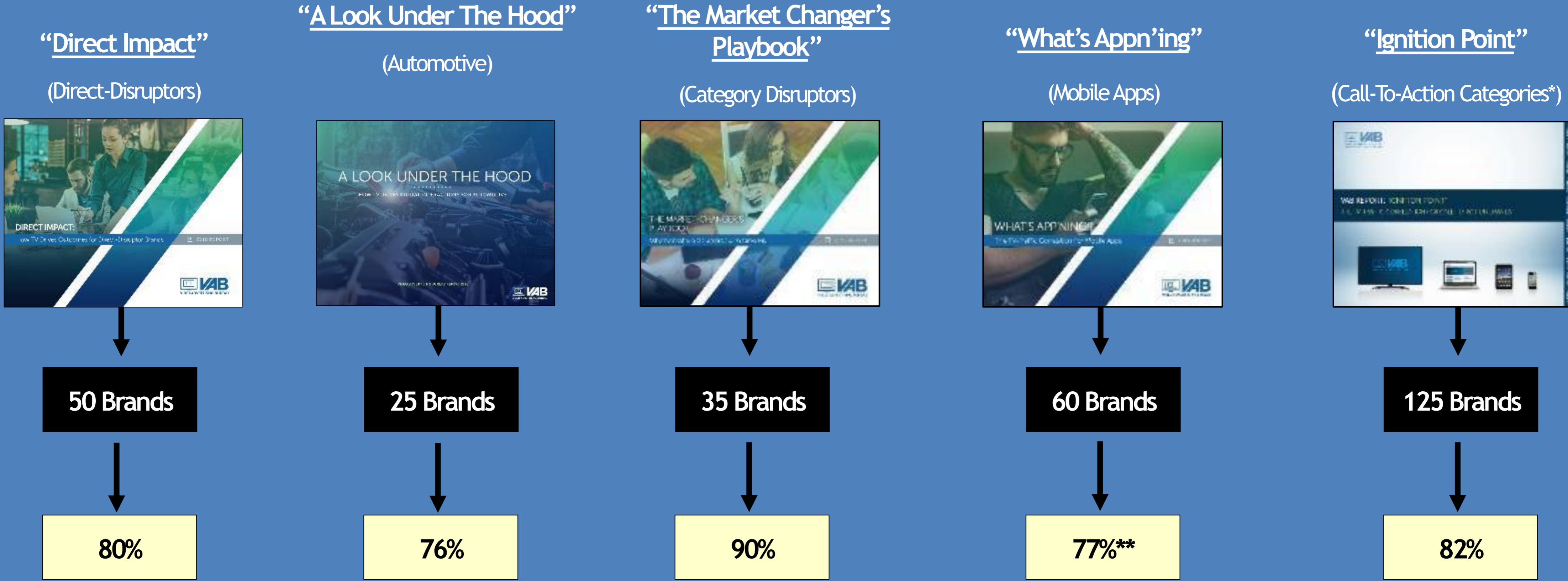
This Old House
 DUCK DYNASTY wahlburgers
 the BIG FLIP DANCE MOMS

PLUTO TV

STORAGE WARS
 ANTHONY BOURDAIN NO RESERVATIONS
 KITCHEN NIGHTMARES UNSOLVED MYSTERIES
 TOP SHOT

Linear TV Spend Drives Website Traffic Across All Categories, For Advertisers Of *All Sizes*

12 Analyses in Total → 40+ Categories → 500+ Brands



← TV Spend Vs. Website Traffic Correlation →

*Ignition Point - “Call-To-Action” categories include restaurants, retail, travel, telco, financial & insurance. **What’s Appn’ing - 86% correlation for gaming app subcategory. % reflect that percentage of brands that saw a correlation between their TV spend & website traffic

Connected Device Ads see an average **+13.5%** lift in purchase intent



Similarly, The Engagement These Connected Viewers Have With OTT Programming Increases Their Purchase Intent

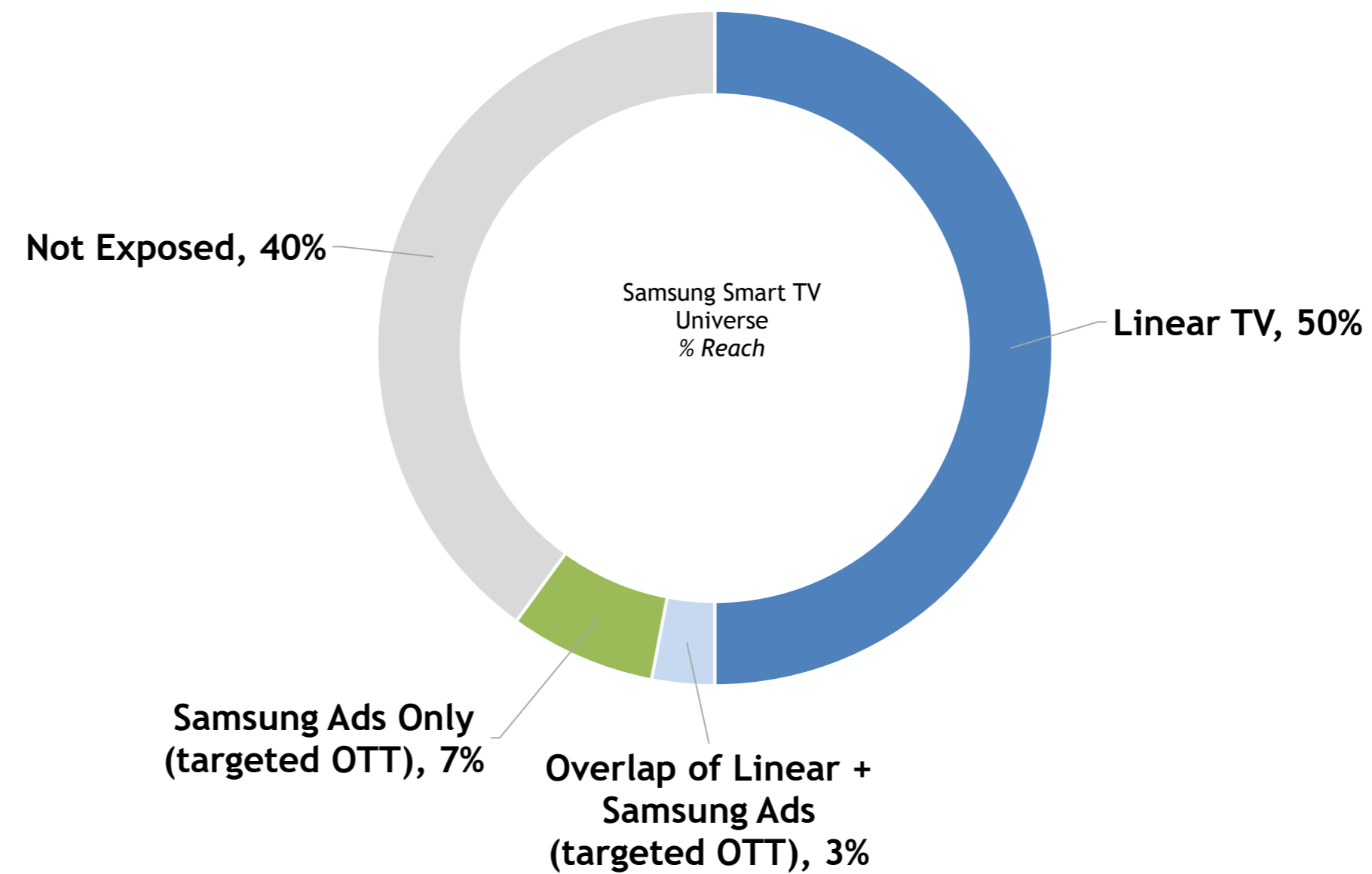


Viewers of ad-supported OTT are **39%** more likely than SVOD viewers to buy products directly from the brand online



Case Study: Auto Manufacturer

Supplementing a linear TV buy with *targeted* OTT to drive incremental reach of the brand's best potential customers



1 Using ACR technology, it was determined that the brand's linear ads were reaching 50% of the Smart TV Audience

2 Samsung Ads was able to identify & target the best prospective customers of that brand. This included 'vehicle intenders,' the affluent, and sports fans.

Consequently, not only did the buy deliver incremental reach, but that of *higher-value* as it exposed the campaign to more likely buyers.

Use of Data-Fueled OTT Increased Total Plan Reach By **20%**

12% of total plan reach was incremental (targeted-OTT only) and comprised of the brand's best prospective customers

Data-Fueled OTT Buys Can Add Valuable Incremental Reach in the Form of a Brand's Best Prospective Customers, Thus Improving Business Outcomes



Source: Samsung Ads. Note, the Samsung universe is nationally representative, with 32 MM TVs, approximated to 27MM households and equivalent to 40% of market share of Smart TVs

Case Study: Luxury Auto Brand

Supplementing a linear TV buy with *targeted* OTT to drive incremental reach of the brand's best potential customers and quantifying the impact via offline footfall traffic to dealership

SAMSUNG Ads

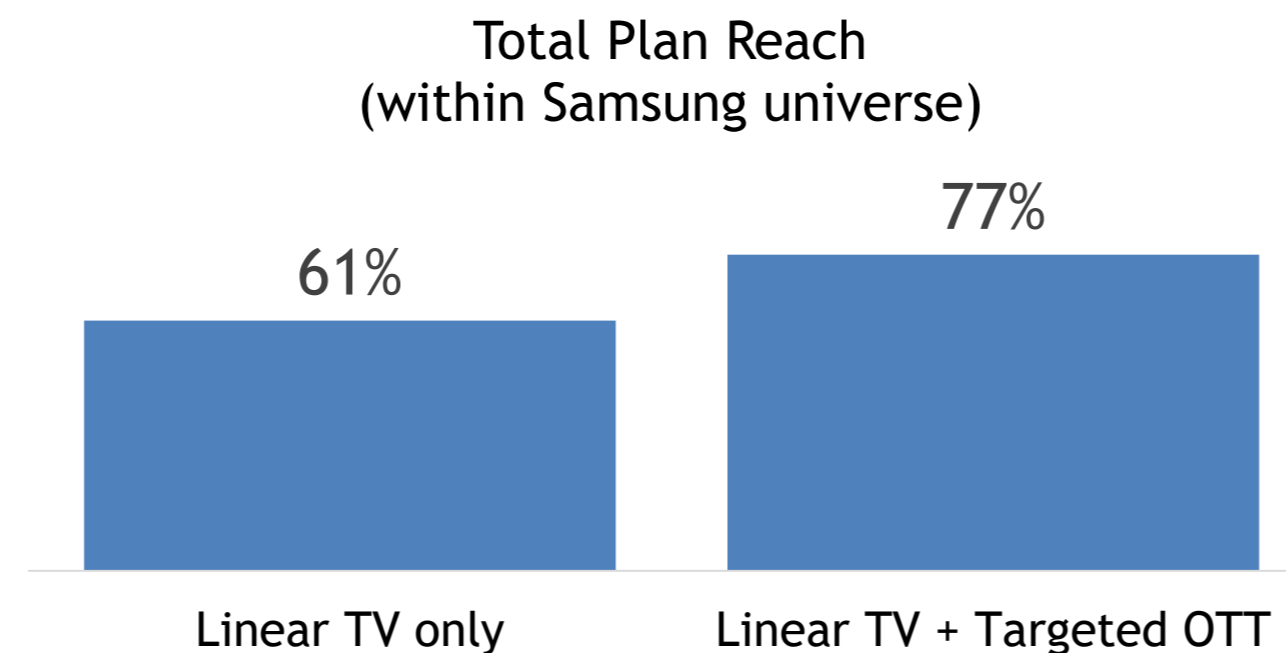
Targeted OTT ads shown to the desired target audience across Samsung devices/apps/Smart TVs, inclusive of a segment of viewers unexposed to linear TV ads to determine incremental lift.



factual

Provided geolocation data & analysis.
Connected Samsung Ads exposure to offline footfall dealership data.

Results:



Incremental reach increased by **+26%**, comprised of best prospective customers

55x

3% of the daily footfall traffic was attributable to those who were exposed to the Samsung ads, generating incremental revenue and an estimated **55x return on ad spend**

Source: Samsung Ads and factual. ROAS based upon average used car deal size for category and brand and average conversion rate of visits/sale

The Impact of Targeting These Lucrative Customer Segments Is Quantified By Examining Attributable Store Traffic and ROAS

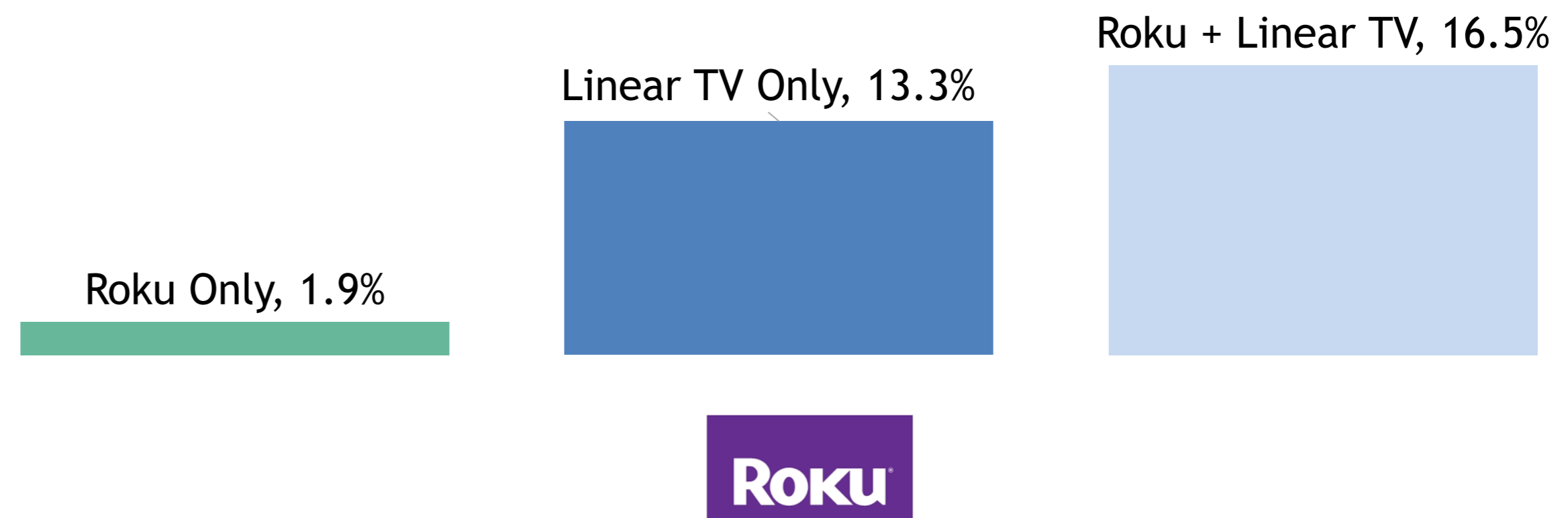


When OTT
Complements a
Linear TV Schedule,
Conversion Increases

Roku Tune-in Insights:

Conversion is greatest for campaigns using a combination of OTT and Linear TV. In this case, automatic content recognition technology directly measures whether a network's tune-in promotion led to an increase in linear viewership.

Tune-in Conversion Rate Percent Among Platforms
Roku case study



More Premium Ad Opportunities & Outcomes



Ad-supported OTT programming is simply an extension of the same premium, popular content found on linear TV

Linear TV & OTT are proven to stir the consumer interactivity and purchase intent that drive business growth

When used in conjunction, they can drive incremental conversions for a campaign especially as advanced targeting capabilities are implemented



Need we say *More?*

Ad-supported OTT should be considered as an element to the overall video mix - it is simply an extension of the brand safe, engaging, premium content found within linear Television.

In combination, Linear TV and ad-supported OTT increase the consumer engagement of a campaign, driving up the interactivity and attention that influences business outcomes.

While Linear TV is the primary video reach driver, the growth of OTT provides incremental reach/reinforcement opportunities, particularly among high-value audiences (younger viewers, HHs with children, the affluent).

All together, the expanded & data-fueled reach, heightened engagement, and more premium ad opportunities result in increased opportunities to drive brand growth.

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