

lunch & learn: **the TV advertising bracket**

Is your strategy a slam dunk?

Tip-Off: Welcome & Introduction



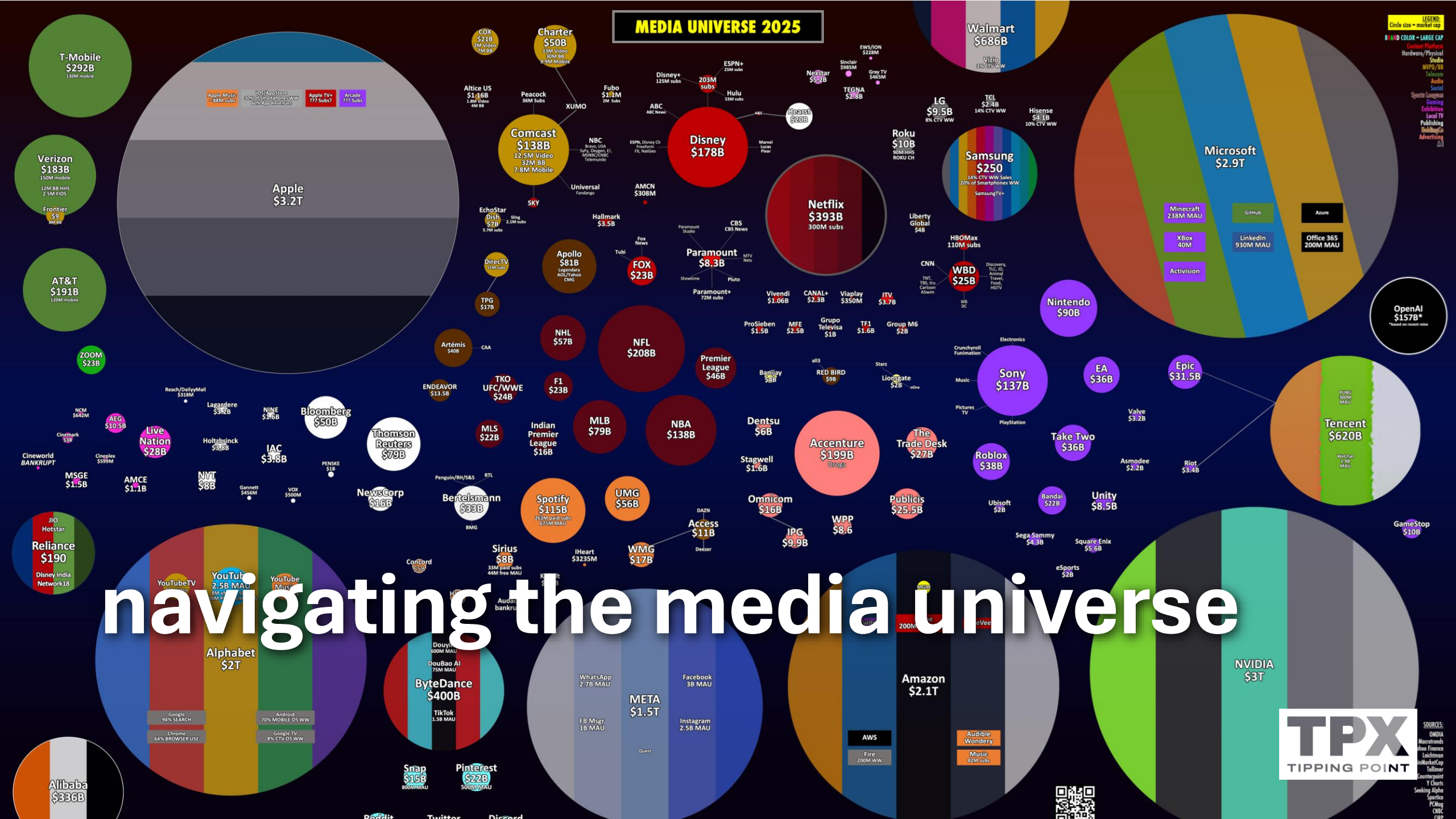
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MEDIA UNIVERSE 2025

TPX
TIPPING POINT

SOURCES:
 OMDIA
 Macrotrends
 Yahoo Finance
 Leichtman
 MarketCap
 Tellimor
 Counterpoint
 Y Charts
 Seeking Alpha
 Sportico
 PCMag
 CNBC



the matchup: linear TV vs. connected TV

Linear TV, Connected TV (CTV), OTT – what the heck?

- **What is Linear?**
 - Is it the same as Traditional TV?
- **What is CTV?**
- **What is OTT?**



Linear TV – The Classic Powerhouse

- What counts
- Great for live events (like March Madness!)
- Broad reach, local targeting
- Higher cost commitment, less precision targeting
- Historical and trusted data to allow forecasting



Connected TV (CTV) – The Fast-Break Star

- Streaming on ad supported platforms like Hulu, Disney+, Tubi, Pluto, Amazon, and more
- Subscription and Ad Supported
- “FAST” channels
 - Free Ad Supported Television
- CTV vs OTT – What’s the difference?



The Gauge™

Nielsen's Total TV and Streaming Snapshot

February 2025

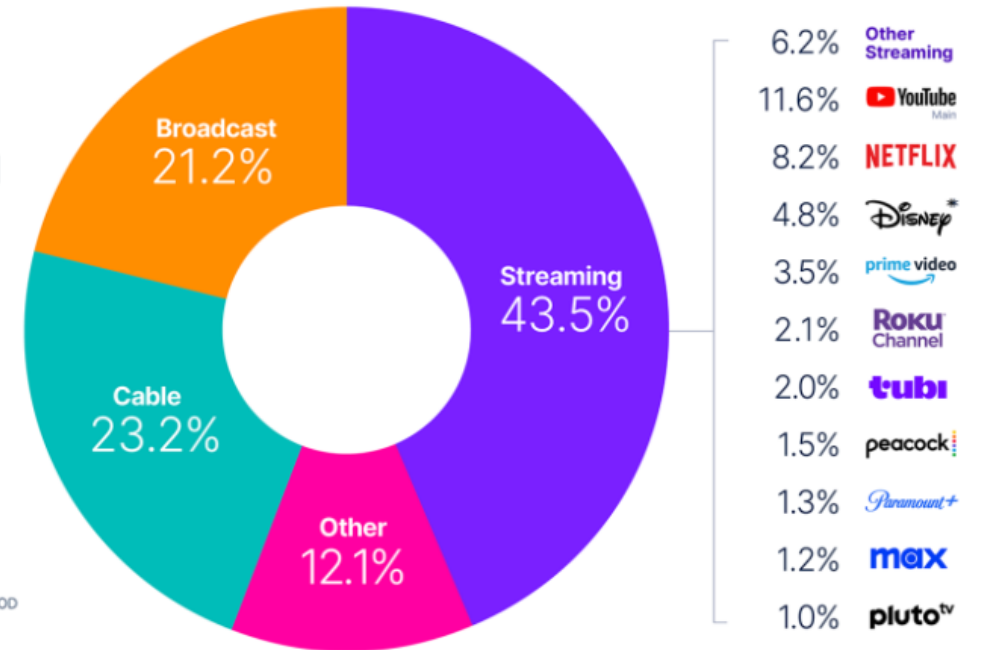
Total Day | Persons 2+

* Disney includes viewing on Disney+, ESPN+ and Hulu SVOD

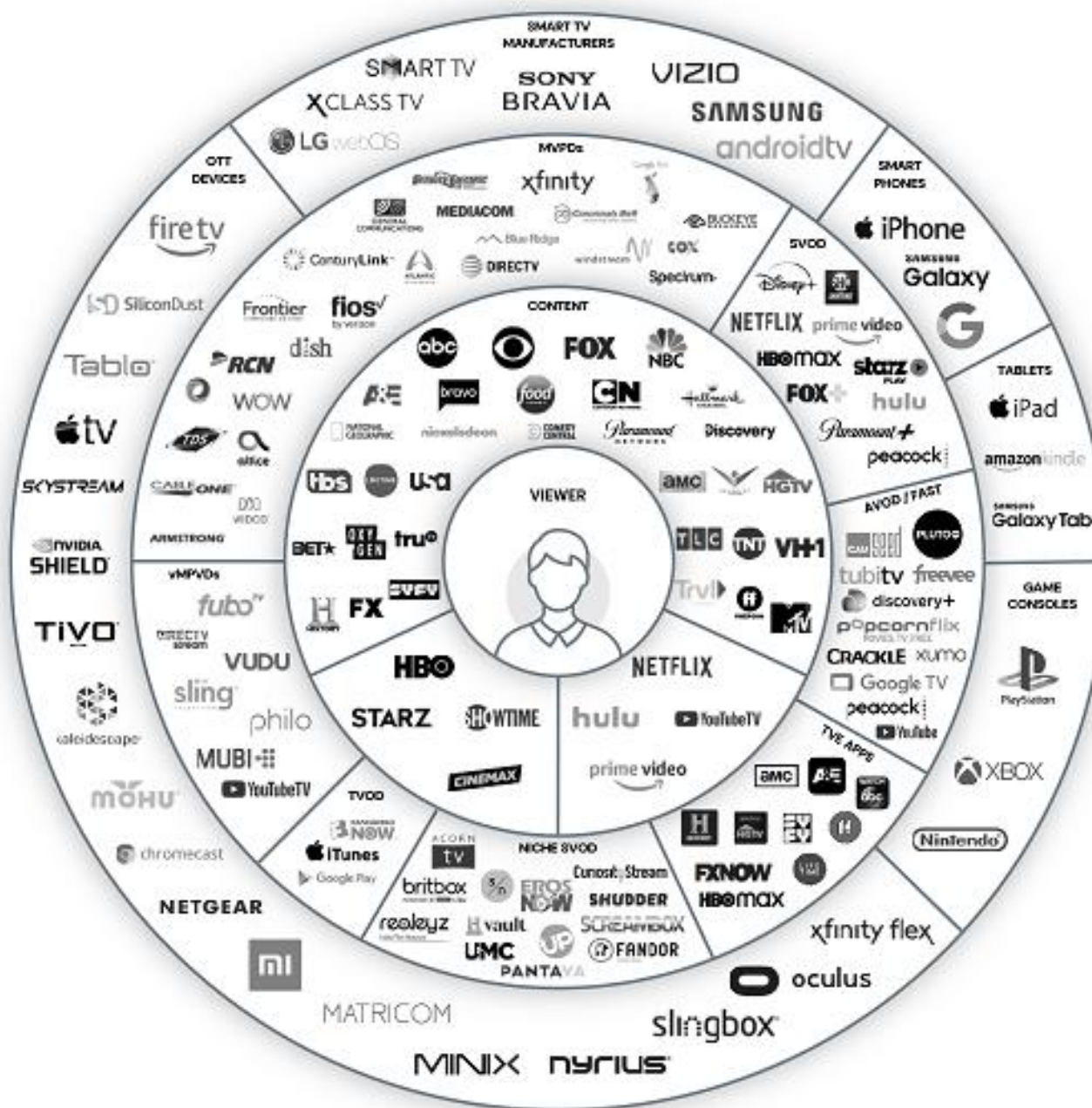
Methodology available @ www.nielsen.com/thegauge

Source: Nielsen National TV Panel plus Streaming Platform Ratings

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Media Landscape in the United States

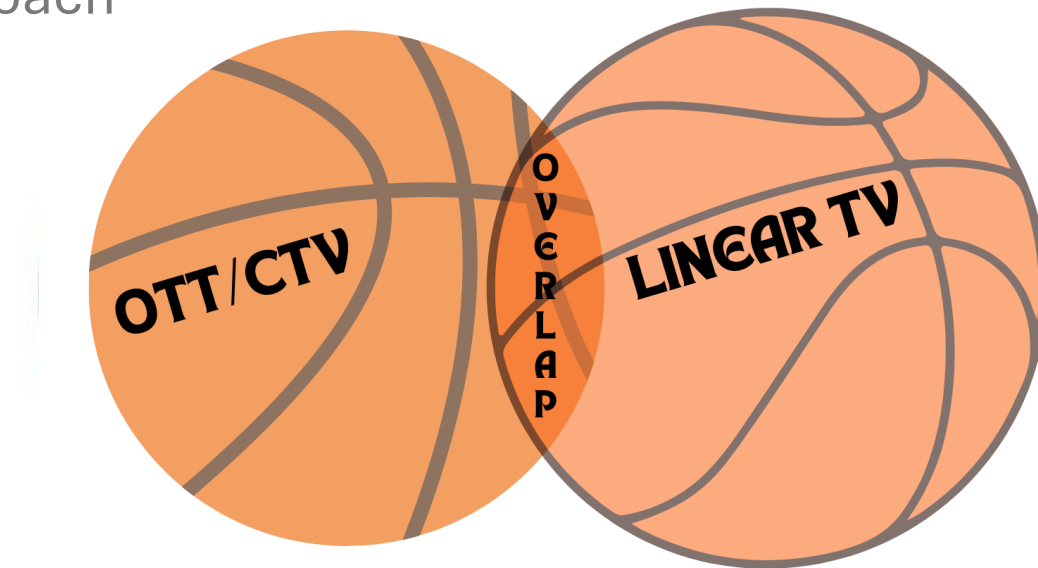


Follow the ball!

- AVOD — Advertising VOD
- SVOD — Subscription VOD
- TVOD — Transactional VOD
- PVD — Premium VOD
- vMVPD — Multichannel Video Programming Distributor
- FAST — Free Ad-Supported Streaming — host, linear channel “live”

Which should you bet on?

- Take a hybrid approach



	Reach Proportion	Avg Frequency	Unique Reach
OTT 🔗	45%	1.7	89%
Linear 🔗	50%	3.6	90%
Overlap	5%	5.4	



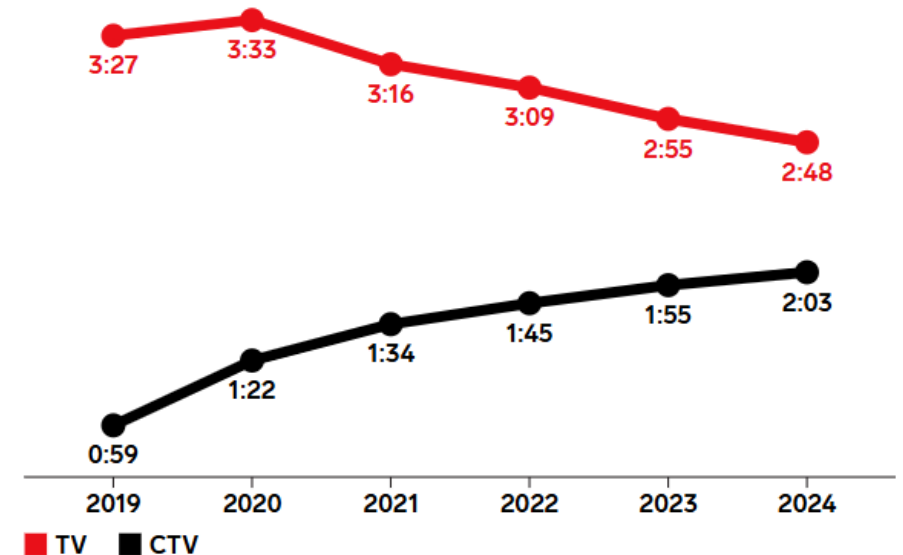
**where are
your fans
watching?**

Linear TV

- Linear / Traditional TV viewership is declining, but it's still in the game!
- Not considering broadcast and cable placements in your media mix might mean missing your core audiences

Average Time Spent per Day With TV vs. Connected TV (CTV) by US Adults, 2019-2024

hrs:mins



Note: ages 18+; TV includes live, DVR, and other prerecorded video (e.g., video downloaded from the internet but saved locally); includes all time spent watching TV; excludes digital; CTV includes all time spent using the internet through a CTV; includes CTV devices such as Apple TV, Xfinity Flex, connected Blu-ray devices, connected game consoles, Google Chromecast, Roku, and smart TVs
Source: eMarketer, June 2023

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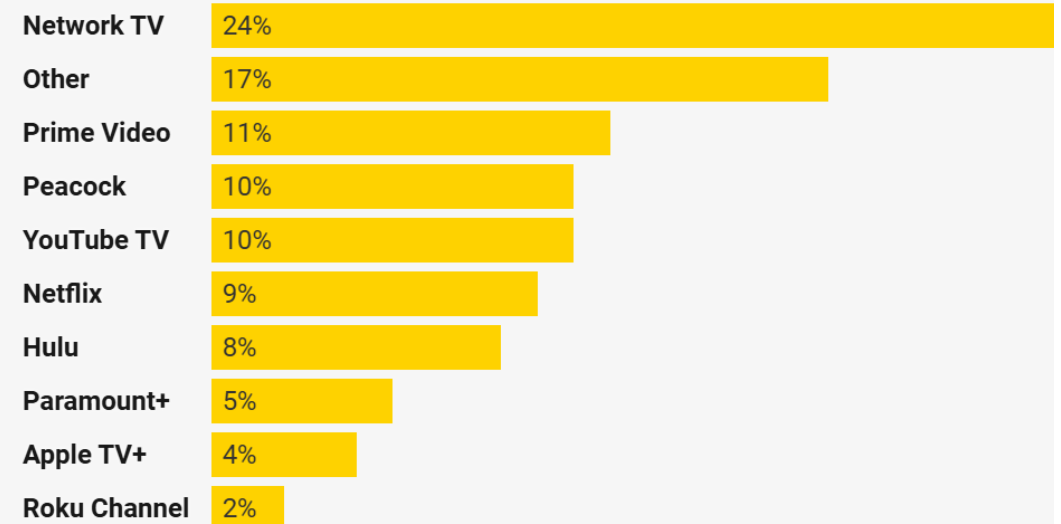
eMarketer | InsiderIntelligence.com

Yet, User Experience Matters!

- While time spent on streaming services is up, consumers enjoy the experience of watching on Network:
 - Fewer tech problems
 - Higher quality, better resolution (NFL on Prime was lousy)
 - Better sportscasters/talent

streaming platforms, whether they've had tech problems or not.

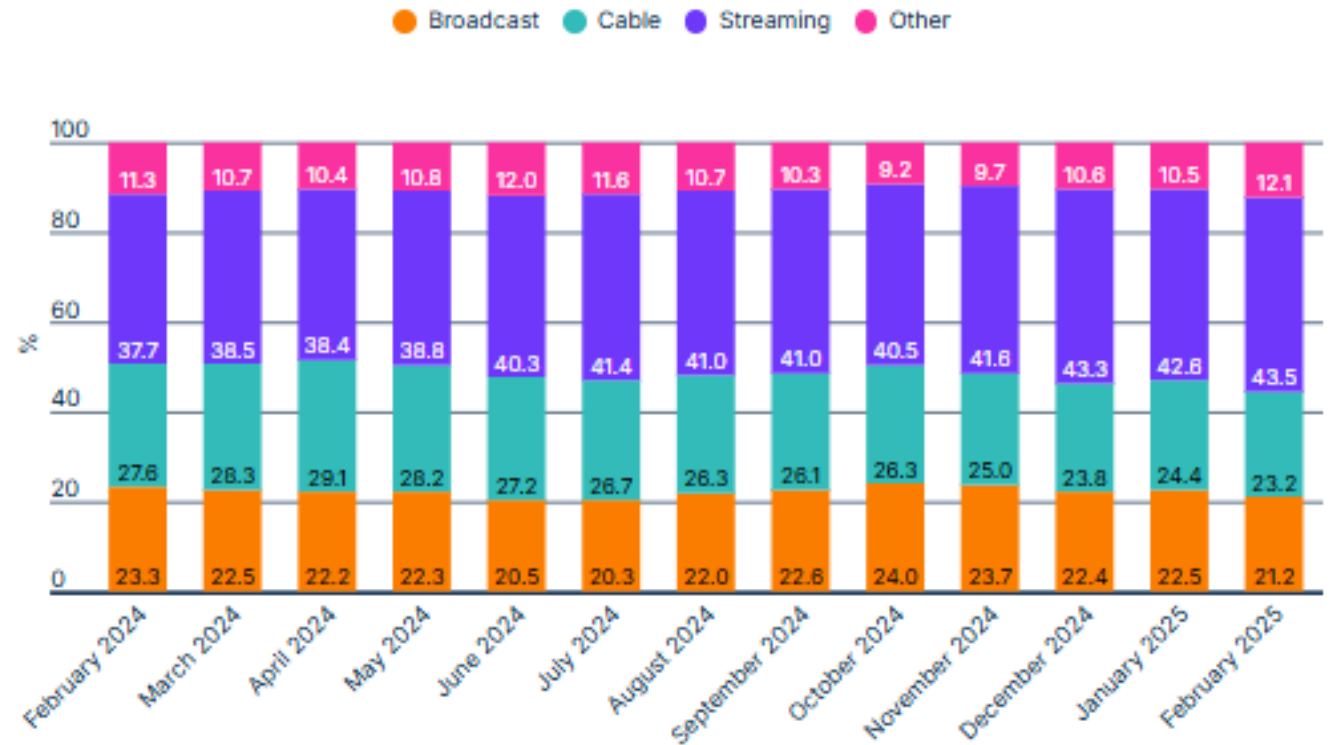
Percentage of US fans who think which platform would do the best job of providing sports content



Source: [Hub Entertainment Research](#) • [Get the data](#) • Created with [Datawrapper](#)

Streaming is Surging

- Time spent is up 108% since 2019.
- Streaming as a percentage of media consumed on TV continues to rise
- A lot of options! But we have ways of finding the best fit.
- Beyond the video ad
 - L Bars
 - Menu screen ads
 - A/B commercial options
 - Pause ads
 - Binge ads
 - Countdown for the break
 - Interactive ads
 - Display Retargeting



Note: The streaming category does not include "linear streaming" (the aggregation of vMVPD/MVPD apps).

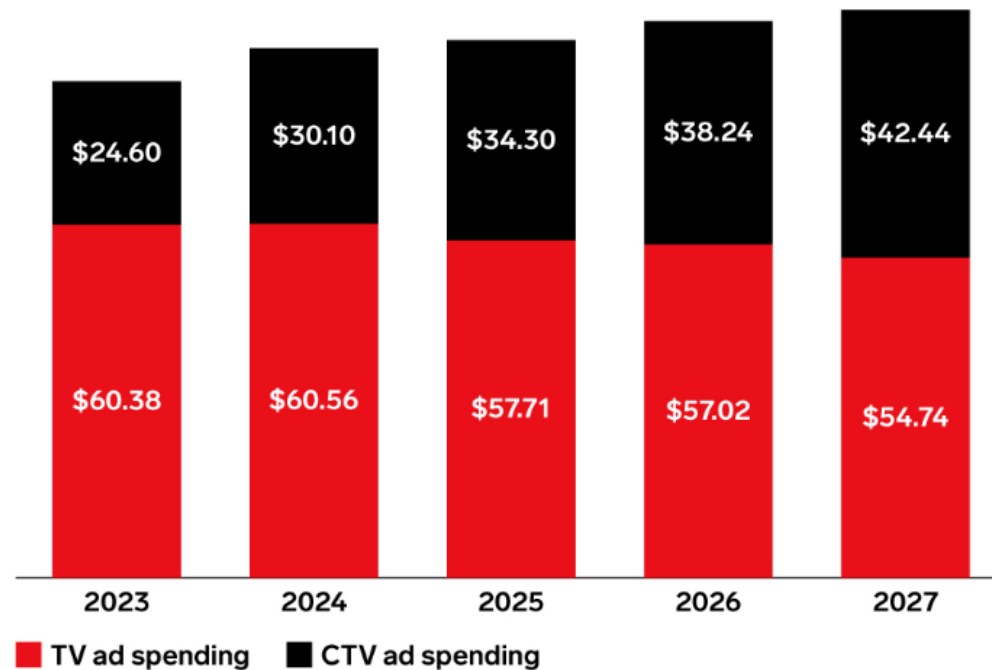
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Final Four Strategy

- How businesses are pivoting their ad spend for 2025

US TV and Connected TV (CTV) Ad Spending, 2023-2027

billions



Note: TV includes broadcast TV (network, syndication, and spot) and cable TV; excludes digital; CTV includes digital advertising that appears on CTV devices; includes display ads that appear on home screens and in-stream video ads that appear on CTVs from platforms like Hulu, Roku, and YouTube; excludes network-sold inventory from traditional linear TV and addressable TV advertising

Source: Insider Intelligence | eMarketer Forecast, Oct 2023

283931

Insider Intelligence | eMarketer



building your championship strategy

Targeting Methods

Broad demographic vs. hyper-targeted, first-party and 3rd party data

- 1st Party data can be client supplied lists and data like CRM lists or Site Visitors
- 3rd Party data can be pre-built audience segments provided by a 3rd party like credit and debit card purchase data from Equifax

Programming vs. Audience

- Linear is great for reaching large groups of people with branded messaging based on demographic information and geography
 - This is especially true for key programs like live news, sports, and tentpole events
- Streaming allows for buying the audience, wherever they may be watching

How to Budget

- Big investment vs. flexible, performance-based spend
 - Flexibility on CTV and Linear
 - CPM vs Spots
- Finding your effective reach and frequency
- Ad load and audience perception
 - Linear audiences are well versed in how heavy ad loads are and when they appear in programs
 - Streaming audiences, especially when the service is paid, expect 0 to minimal ad load, shorter breaks, countdowns and personalized, relevant ads

Current Investment Strategies for Select Platforms According to US Media Agency Professionals, Nov 2024

% of respondents

Connected TV (CTV)



YouTube



Meta



TikTok



Linear TV



■ Increase investment

■ Decrease investment

■ Same investment

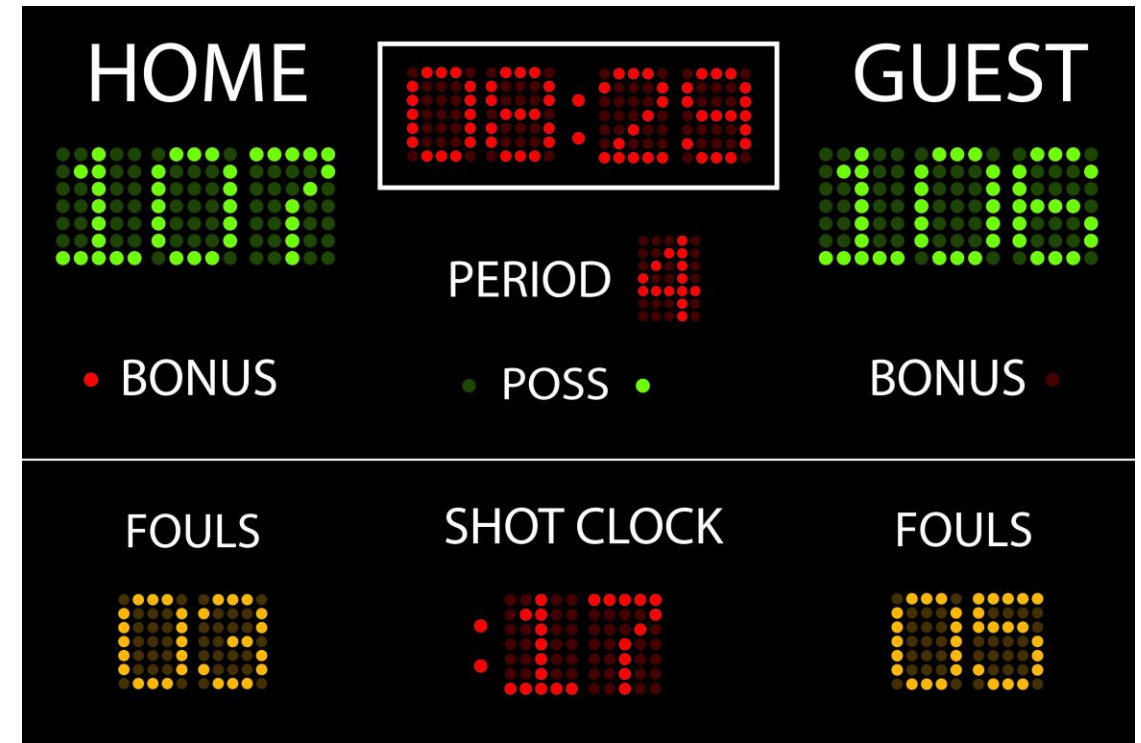
■ Not sure

Note: n=124; numbers may not add up to 100% due to rounding

Source: Pixability, "US YouTube & Connected TV Media Agency Survey 2025," Jan 21, 2025

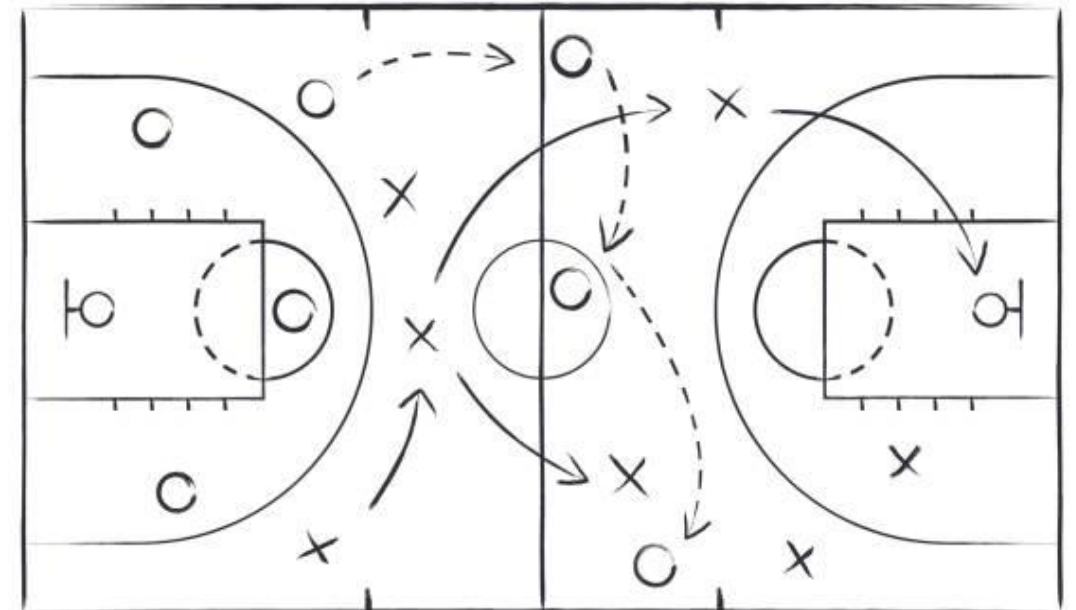
Measuring Success

- Linear
 - Ratings — GRPs & Impressions
 - Correlation KPIs
- Connected TV
 - Impressions and Reach
 - Real-time analytics
 - Visit and conversion attribution



Reviewing Our Winning Playbook

- Combining Linear & CTV for the best ROI
- Know your audiences and target well
- Linear Reach Extension
- Measure Success
- Build on your wins





real world **bracket** **busters**

Case Study #1:

Organization for the Blind through CTV

Objective:

- Increase awareness of services among the visually impaired community and potential caregivers while driving website traffic through digital engagement strategies.
- **Strategy: Leveraging CTV for Targeted Awareness & Measurable Engagement**
 - Executed an **omnichannel campaign** with a strong focus on **Connected TV** to reach visually impaired individuals, employers and their support networks.

Key Elements

1. CTV for Accessibility & Engagement

- Video ads **with accessibility features** such as **audio descriptions** to ensure messaging resonated with the target audience.
- Used **geo-targeting and audience segmentation** to reach residents most likely to benefit from agency services.

2. QR Code Integration for Trackable Engagement

- Embedded **QR codes** in CTV ads, allowing quick access to the website.
- QR scans provided **direct attribution**, connecting **CTV exposure to web traffic**.

3. Multi-Channel Retargeting for Increased Conversions

- **Retargeting audience** from CTV viewers & reinforced messaging through **digital display ads**.
- **Strengthened** brand recall by keeping Agencytop-of-mind for those who engaged with CTV content.

Lessons Learned

Results: Increased Awareness & Website Engagement

 **CTV delivered 3,037,410 impressions**, ensuring broad exposure.

 **108 QR code scans**, a notable success in direct response tracking from CTV ads.

 **17% increase in awareness**, as measured in a post-campaign survey

Key Takeaways

 **CTV effectively reached and engaged the visually impaired community** with accessible content.

 **QR codes provided a measurable way to track campaign success and drive web traffic.**

Case Study #2:

Local Government Economic Development Program

Objective:

- Increase awareness of the **economic development program** by reaching a larger local audience in a neighboring city and driving more **website traffic**.
- **Strategy: Balanced Linear TV + OTT Approach**
 - **Dual-platform strategy** that leveraged the strengths of both **Linear TV** and **OTT**.

Key Elements

1. Linear TV Optimization for Maximum Efficiency

- Identified **high-viewership news programs** to reach engaged audiences.
- Shifted **budget from morning talk shows** to a **7 AM news program**, ensuring higher exposure among commuters and professionals.
Increased placements in the 5:30 PM news slot, capturing viewers during peak local news consumption.

2. OTT (Streaming TV) for Digital Precision & Retargeting

- Complemented Linear TV with **OTT placements**, ensuring reach across **cord-cutters and younger demographics**.
- Used **geo-targeting** and audience segmentation to focus on **residents likely to engage with economic development opportunities**.

3. Retargeting for Increased Engagement

- Built a **retargeting audience** from OTT viewers and followed up with **digital display ads**.

Lessons Learned

Results: Stronger Awareness & Increased Web Traffic

-  **15% increase in website traffic** from the campaign.
-  **More efficient impressions** by optimizing **Linear TV placements**, leading to better response rates.
-  **Improved engagement from OTT audiences**, with a **strategic retargeting layer** driving further site visits.



Your Custom Game Plan

How do we build out YOUR plan?

- Marketing Objective
- Media budget
- Audience
- Timing: Short or Long Campaign
- Goals (Call to Action)



When to pivot, when to keep going

Findings

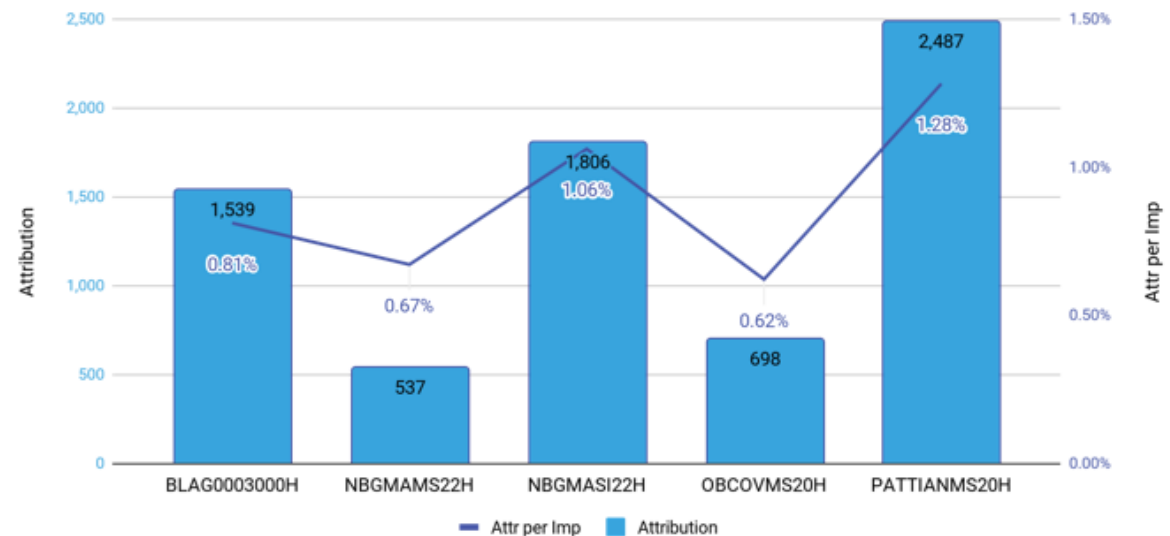
SAMPLE P creative drove over 35% the attributions

Recommendations

Given the creative was consistent across all tactics, there is the opportunity for creative optimizations in the future.

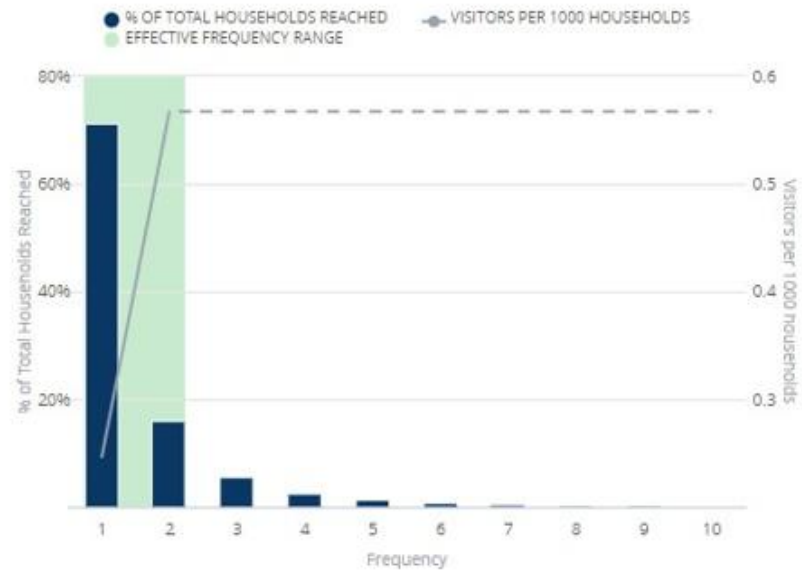
- Prioritize **SAMPLE P**, given the video was the most effective at driving conversions

Creative by Attribution

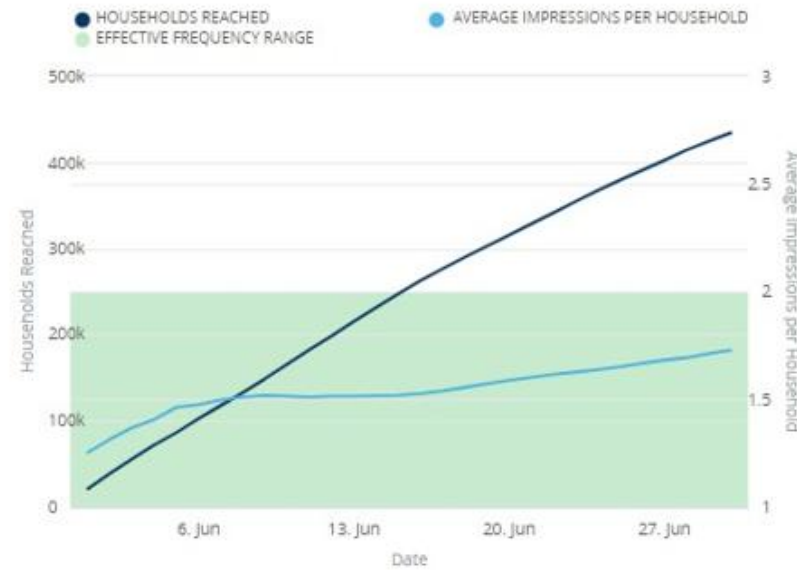


When to pivot, when to keep going

Frequency And Reach Across Households ⓘ



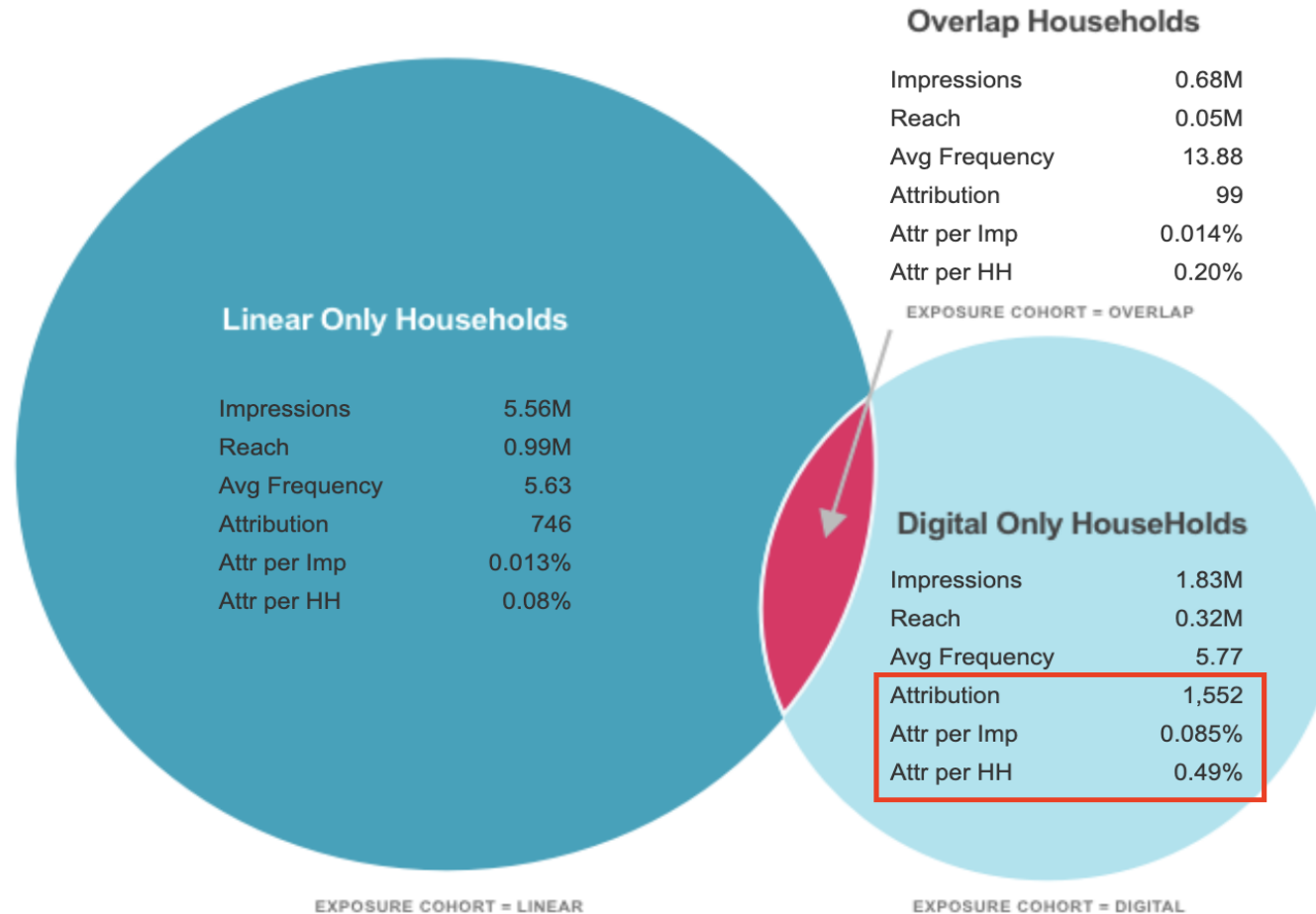
Cumulative Impression Delivery Over Time ⓘ



Effective Frequency
is 2

Effective Frequency Range
The Effective Frequency Range shows the range where increasing frequency is likely to increase the household visit rate. The zone stops when the results are no longer statistically significant or sooner if we no longer see improvements.

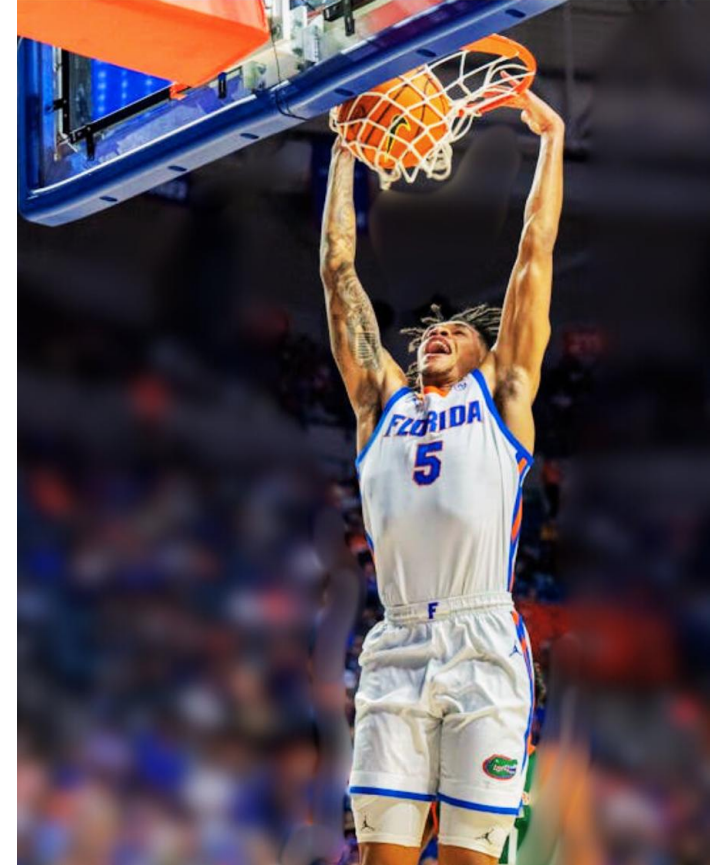
When to pivot, when to keep going



The taste of victory = Return on Ad Spend (ROAS)

We are doing this to help your business GROW

- Help you reach your audiences more efficiently
- Help your media dollars go further
- Help your company meet and exceed its goals
- Provide more insights to help you Do More of what's working



final buzzer

Are you ready to win?

Questions?





thank you from all of us

Get in touch with us for any further questions...or just to say "HI!"

Kevin Wilson

Director of Media Strategy

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Appendix

Overview and Definitions

- Linear or Traditional TV
- Includes
 - Over the air
 - Cable
 - Satellite
- Broad Reach
- Spot buying
 - Programs, dayparts, etc
- Really excels at live events
- Measured in ratings against target demo
 - Attribution is still challenging, but will improve over time

- Connected or Streaming TV
- Includes
 - Streaming services watched on a TV
 - Prime Video, Hulu, Disney+, Max, Pluto, Tubi
- Often on demand, but some live events
- Often buying impressions with an audience
 - May be a 1st party audience (customer list) or 3rd party audience – curated in-market audiences
- Greater attribution
 - Web visit and lead data

- Over the Top (OTT)
 - Includes everything in streaming, but also includes impressions served on desktops, tablets, and mobile devices.

- Streaming Categories for Ads
 - Subscription – no ads
 - Ad supported – subscription services with ad placements
 - FAST – Free ad supported television.