

Linear vs. Streaming: Current State of Creative and Media



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Linear & Streaming
Current State of Creative
and Media



MARCH 20-21 | WARNER BROS. DISCOVERY (30 HUDSON YARDS, NYC) + LIVESTREAM

Overview

Creative

- Lifespan
- Variants

Campaign

- Streaming impressions increasing
- Linear-only campaigns on decline

Measurement

- Higher reach, frequency on linear
- Audiences overlap

Data: Ads + Viewing

Ad Catalog

Ad creatives for linear + streaming
MRC accredited airings data
iSpot Ad IDs + metadata



2.3 MM
Ad Creatives

Viewing Data

Smart TVs



37.9 MM
TV Devices

34.5 MM
Households

Streaming Ads

Streaming Publishers,
DSPs, OEMs & Walled Gardens



158 MM
Devices

500+
Services

Personification

TVision Panel:
Co-view & HH distribution



5 K
Households

14 K
People

Out of Home (OOH)

iSpot-owned Tunity App:
Enables audio for any OOH TV



3 MM
Downloads

57 K
Monthly Actives

Data: Unified Household Measurement

Real Reach

True measurement of real reach from a huge sample of households

Consistent

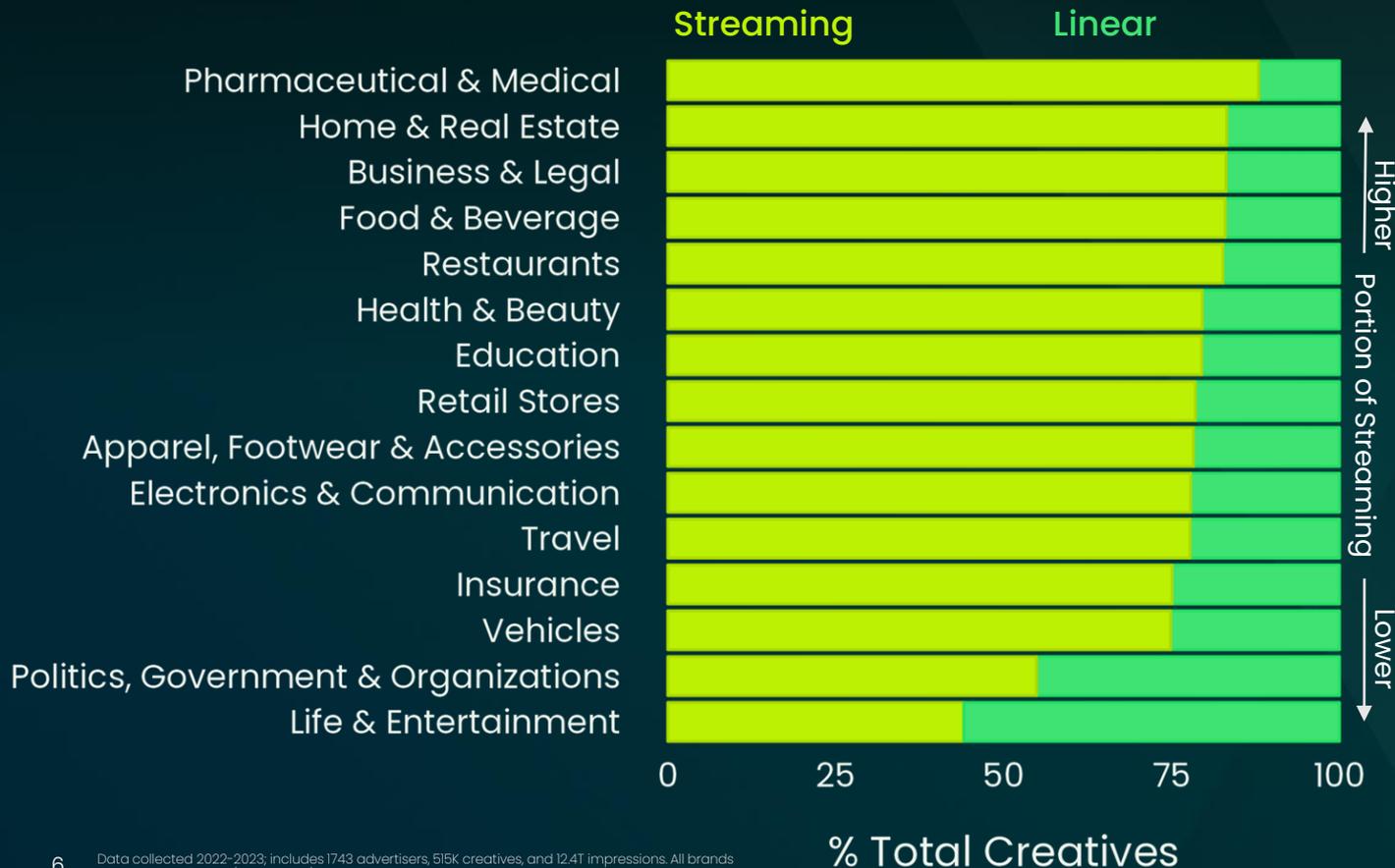
Streaming and linear on common ground

Measurement

Captures cross-screen viewing

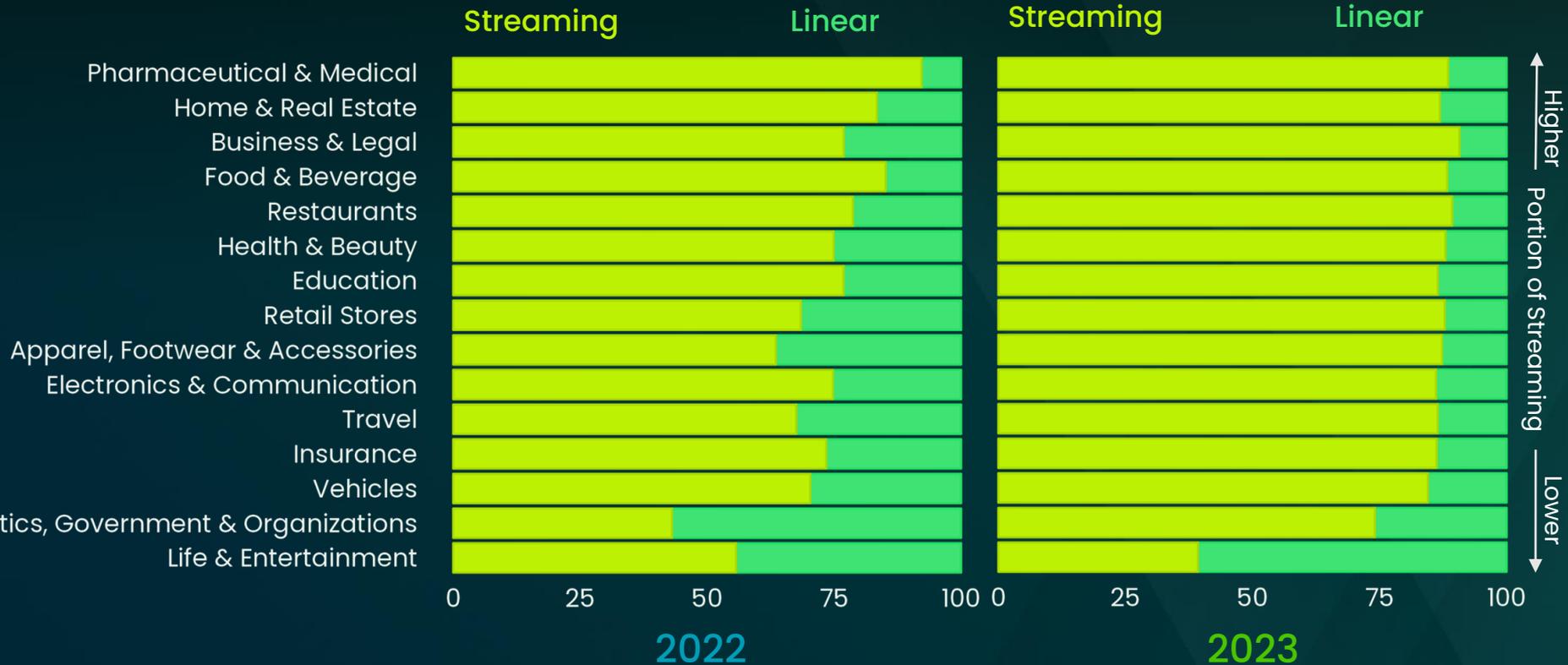
Creative Rotation

Creative Rotation: Streaming Creatives Outnumber Linear 2:1 2022 & 2023



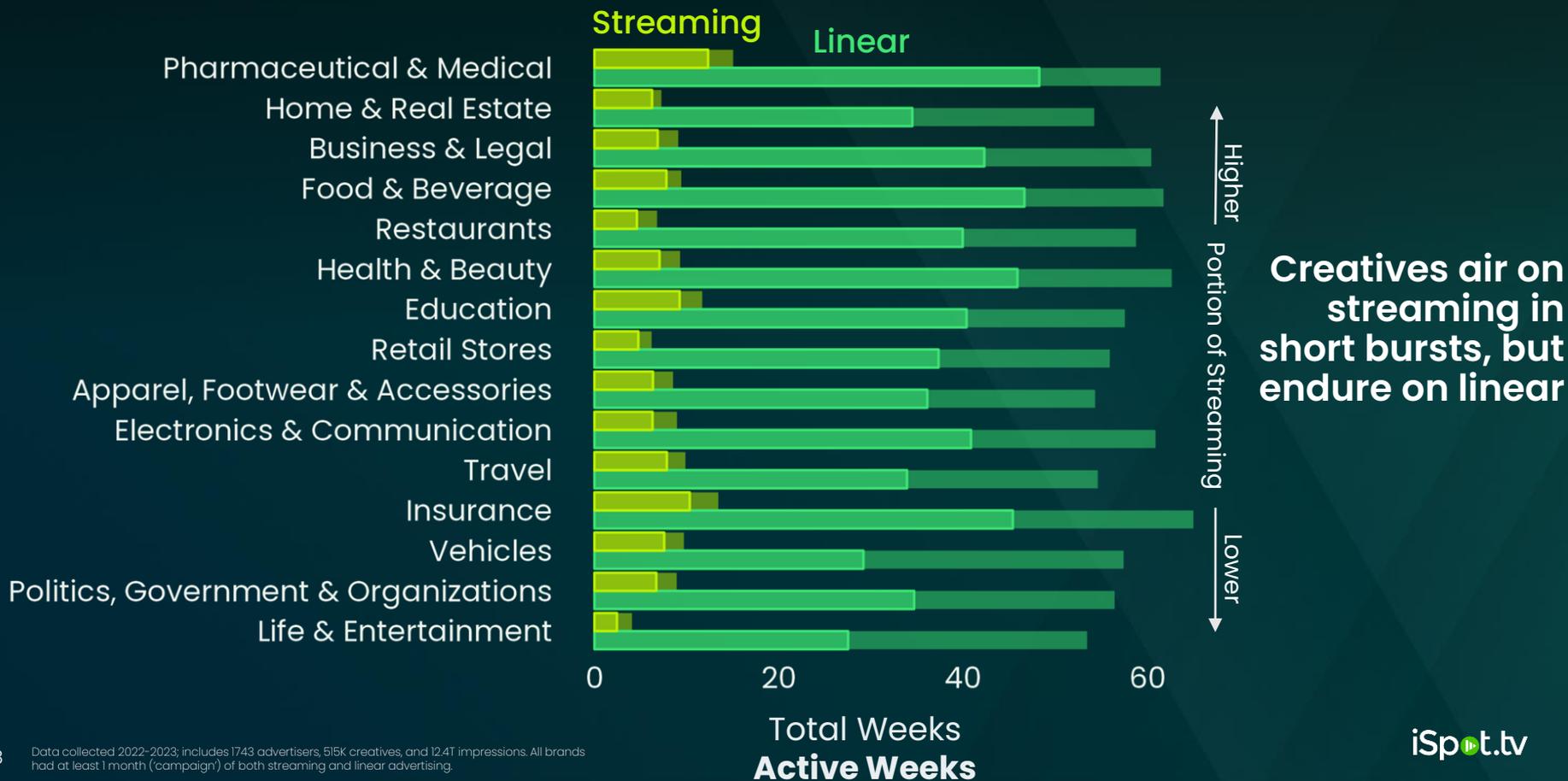
Several industries have >4 creatives running on streaming for every 1 on linear

Creative Rotation: Share of Streaming Creatives Increase in 2023



Creative Rotation: Linear Creatives On Air 5x Longer

2022 & 2023

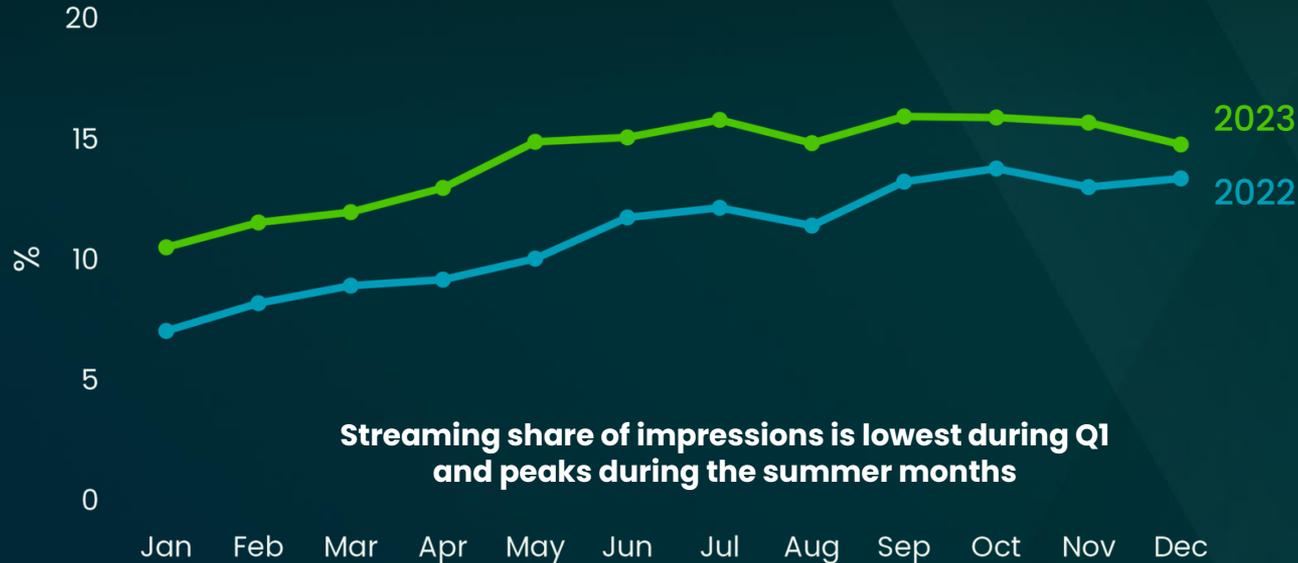


Campaign Composition

Campaign Composition: 24% YoY Increase in Streaming Impressions

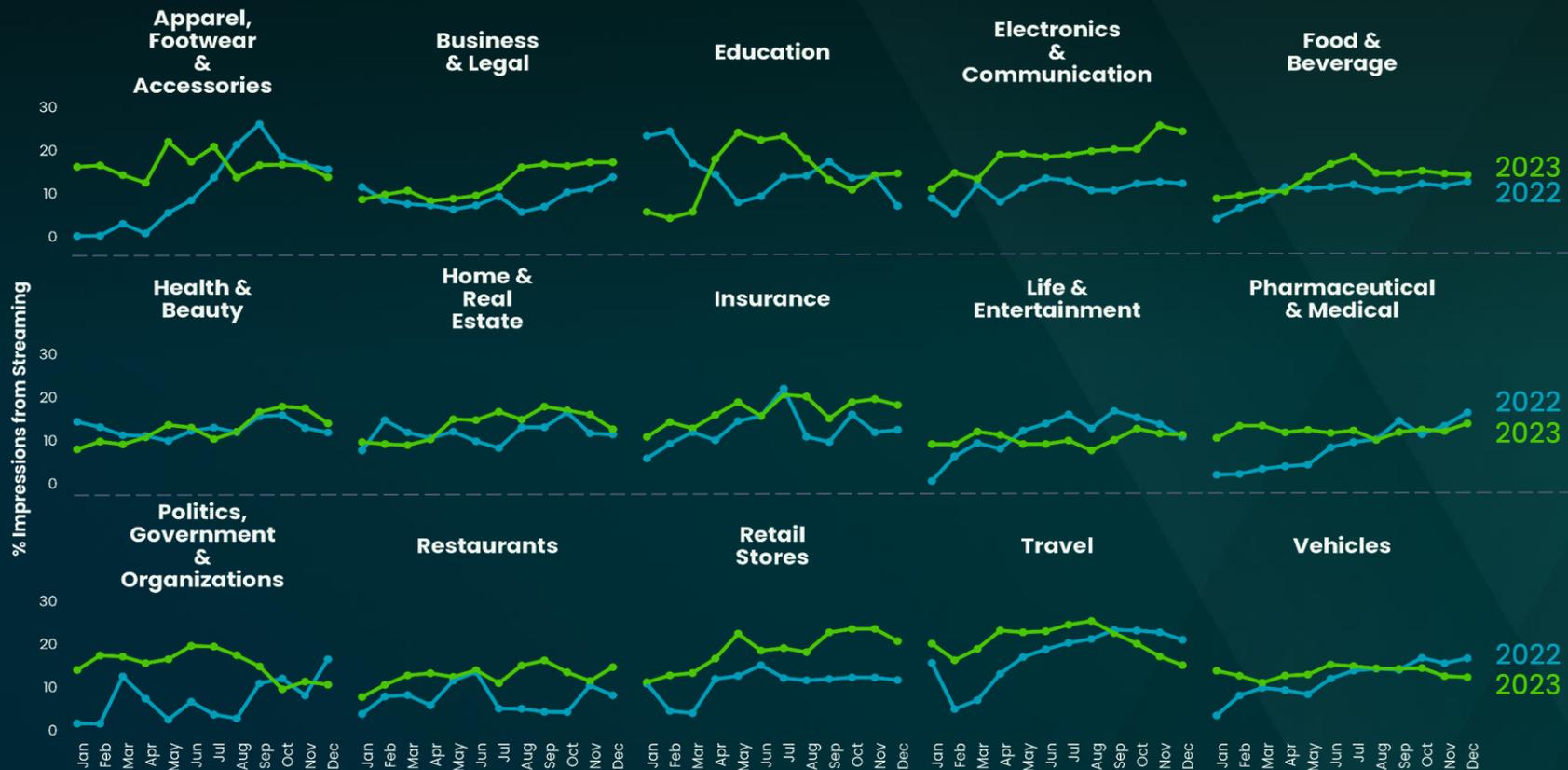
Majority of impressions on linear, with streaming increasing

Percentage of Impressions from Streaming
Campaign average, all industries, 2022-2023



Streaming share of impressions is lowest during Q1 and peaks during the summer months

Campaign Composition: YoY Trends Vary by Industry



Campaign Composition: Campaign Types

Campaigns defined by impression share

Campaign period is set at one broadcast month

Labels account for all impressions earned by the advertiser that month

Vast majority of measured campaigns were linear first

| Campaign | Streaming Share | Linear Share |
|-----------------|-----------------|--------------|
| Streaming Only | 100% | 0% |
| Streaming First | 90 - 99% | < 10% |
| Mix | 11 - 89% | 11 - 89% |
| Linear First | < 10% | 90 - 99% |
| Linear Only | 0% | 90 - 99% |

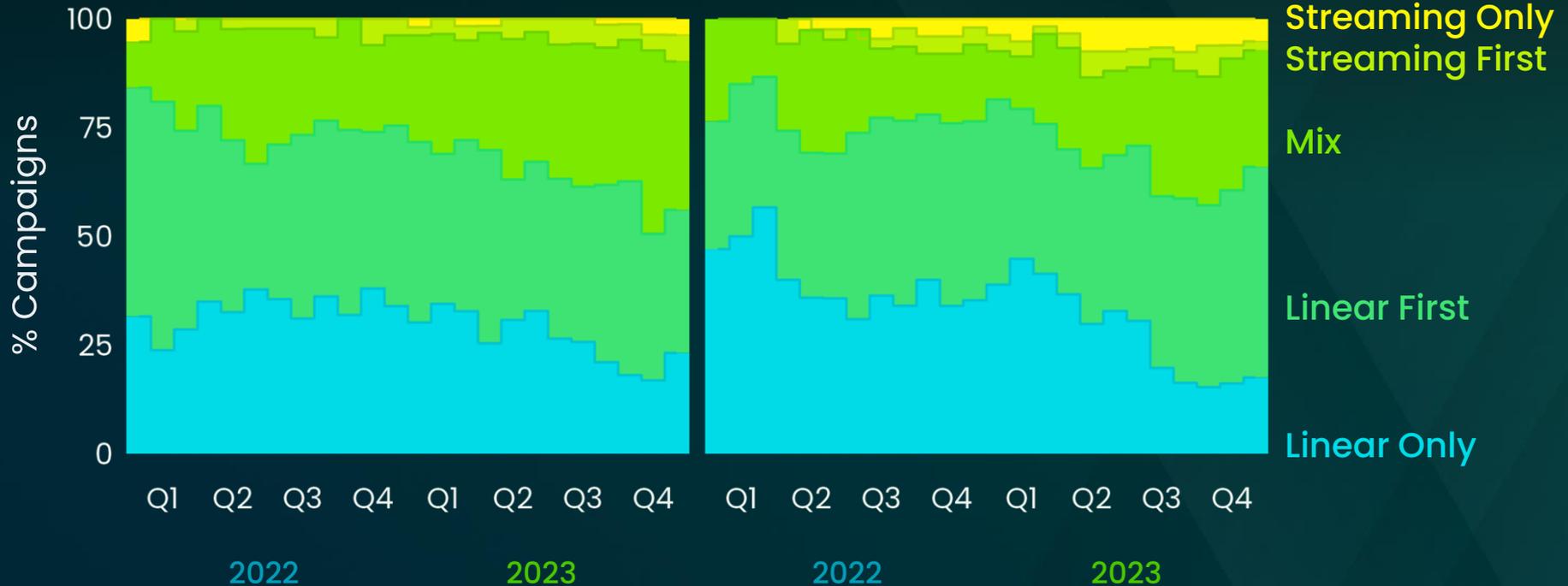
Campaign Composition: +26% Streaming Only; -17% Linear Only



Campaign Composition: Shifting to Mix vs Streaming Only

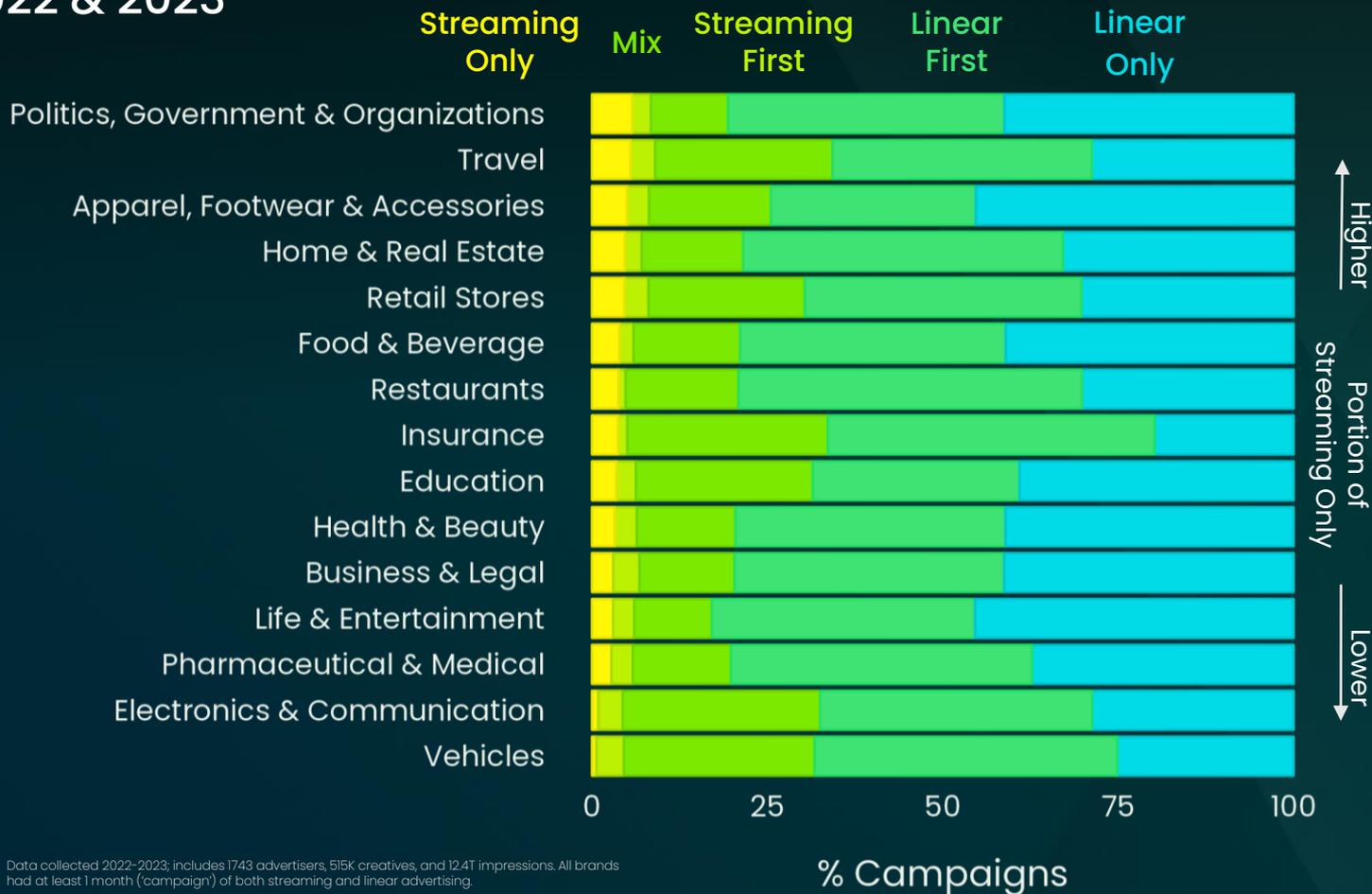
Electronics & Communication

Retail Stores



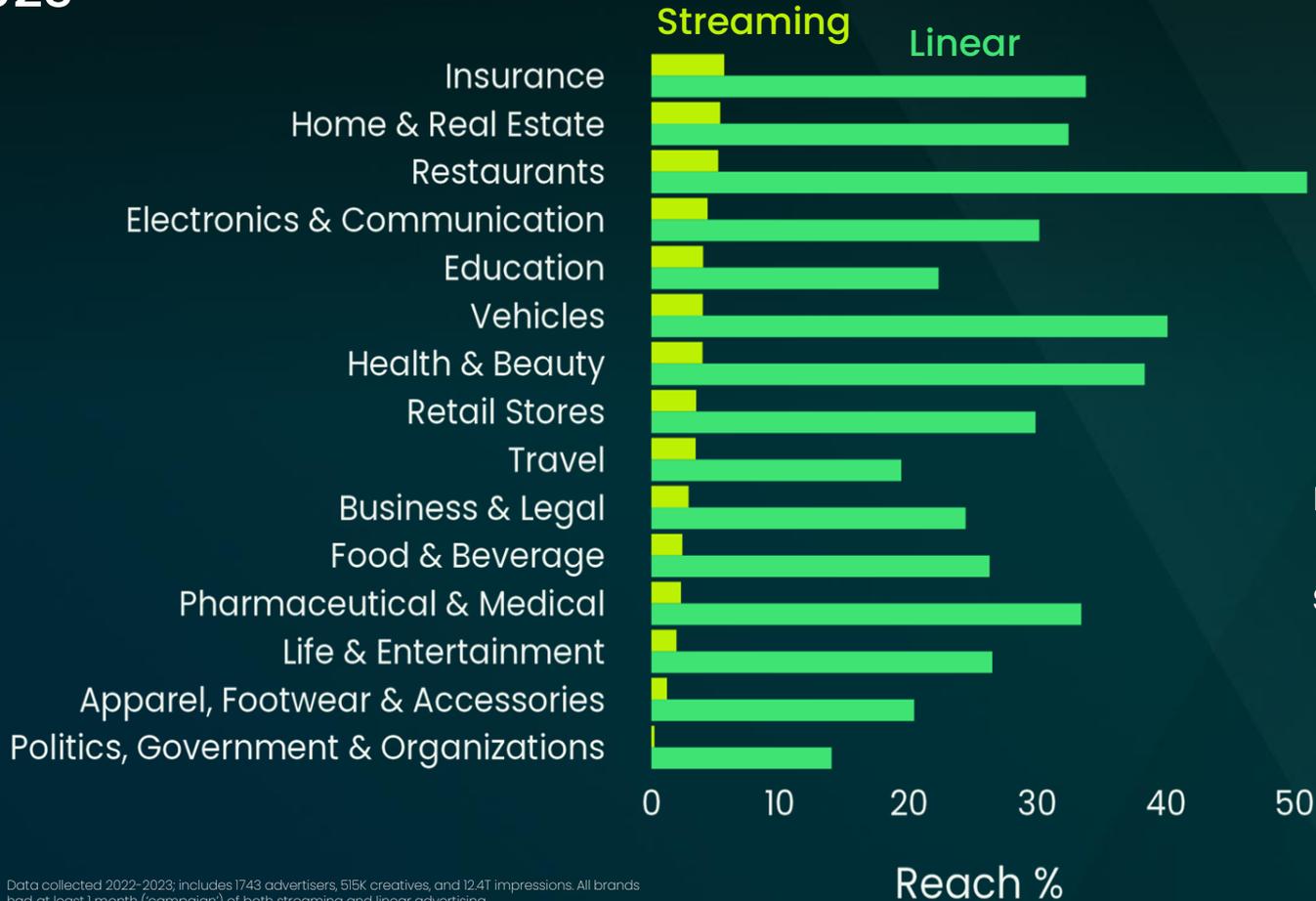
Campaign Composition: Campaign Types by Industry

2022 & 2023



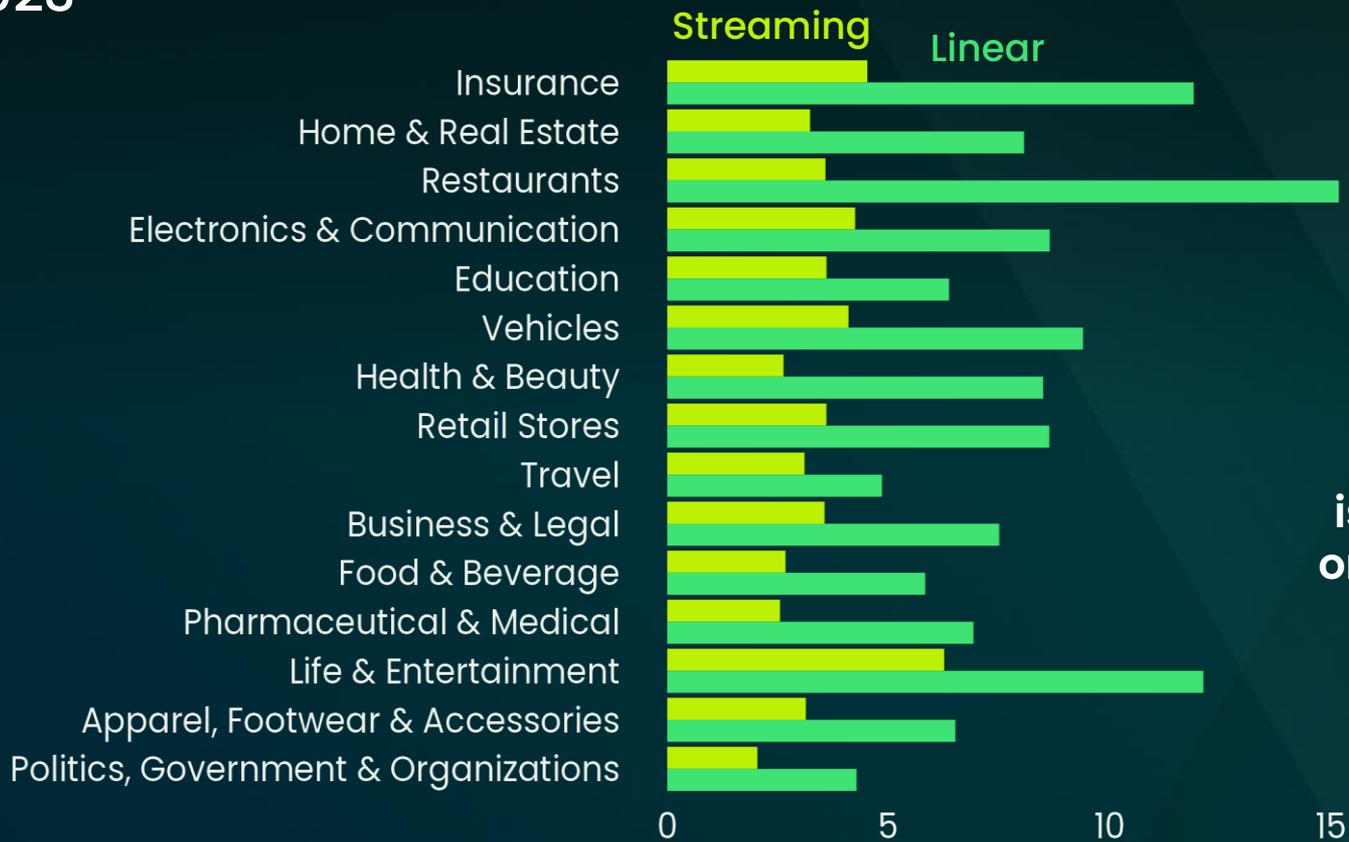
Media Measurement

Media Measurement: Linear Reach Surpasses Streaming 2023



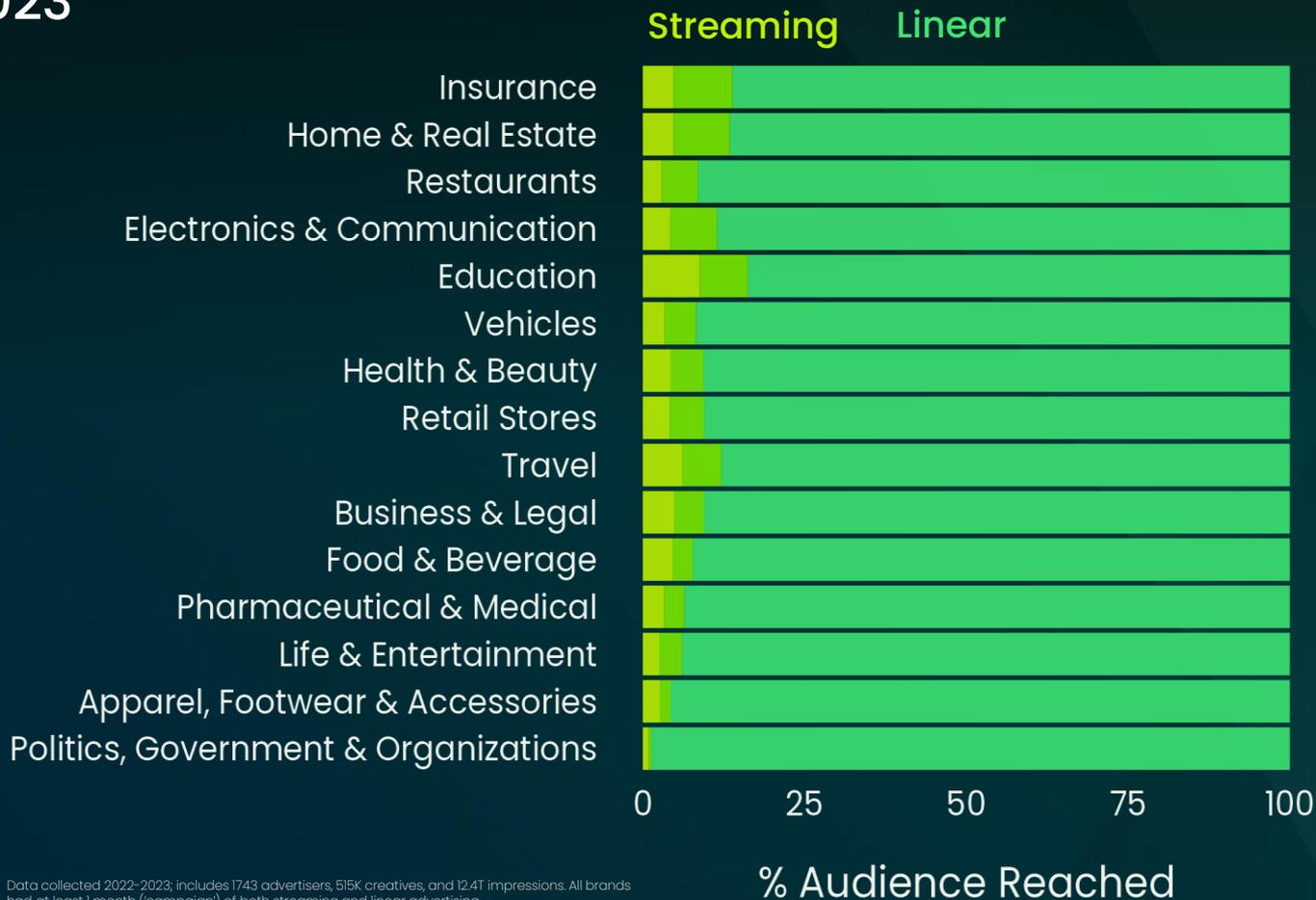
Across industries, average campaign reach on streaming (Avg = 3.5%) is far surpassed by linear (Avg = 31%)

Media Measurement: Higher Average Frequency on Linear 2023



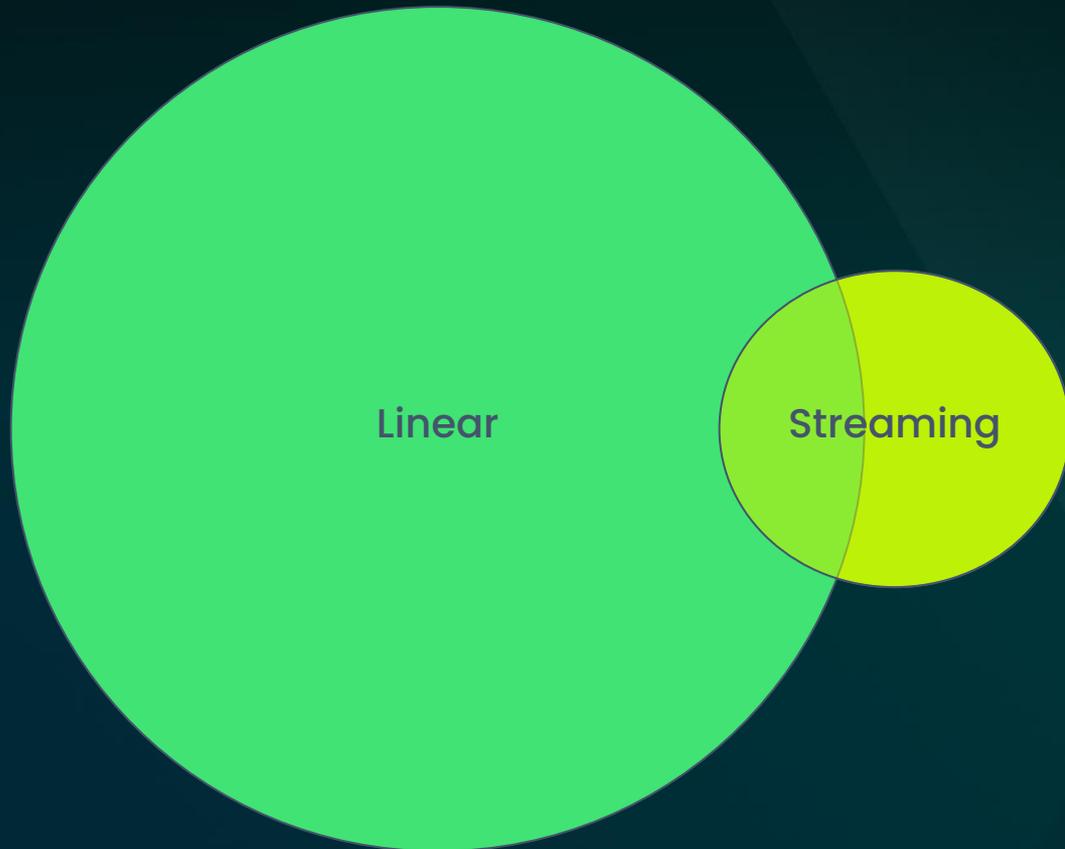
Across industries,
average frequency
is nearly 2.5x higher
on linear (Avg = 8.3)
than on streaming
(Avg = 3.5)

Media Measurement: Streaming and Linear Audiences Overlap 2023



**As much as 57%
of a campaign's
audience is
exposed on
both**

Media Measurement: Streaming and Linear Audiences Overlap 2023



Across industries, 6% of the reached linear audience is also exposed on streaming; 45% of the streaming audience is also exposed on linear.

Summary

Creative

More creatives run for a shorter period of time on streaming compared to linear

Campaign

Across industries, brands are increasingly leveraging streaming on top of traditional linear TV buys

While linear-only campaigns decline, we see increases in mixed and streaming-first campaigns, along with the emergence of streaming-only campaigns

Measurement

Linear generates higher reach and frequency per campaign compared to streaming

For some industries and campaigns, there is substantial overlap in streaming and linear audiences

Q & A

Appendix

Data: Collection and Inclusion

Overview

Data were collected throughout 2022 and 2023. A 'campaign' is defined as one month of advertising from one brand on one platform.

Brand Inclusion

Brands with iSpot-enabled streaming measurement were eligible for inclusion.

All brands advertised on both streaming and linear at some point during the analysis period (not necessarily at the same time).

Brands were included on a rolling basis throughout the analysis period; streaming measurement had to be enabled for at least one month prior to inclusion.

At least 10 brands are included in each industry.

1743

Advertisers

515 K

Creatives

12.4 T

Impressions

Campaign Composition: YoY Trends Vary by Industry



Streaming Only

Streaming First

Mix

Linear First

Linear Only

Media Measurement: Streaming and Linear Audiences Overlap 2023

