

**Total Video**

**Video Convergence Is Here, and Its Fabulous!**

**Roundtable Summary**

- “Convergence” – the fusing of traditional television and online video – is like “The Year of Mobile”: headline clickbait for so long we didn’t notice when it actually happened.
- TV isn’t dying: it’s having babies. Call it OTT, CTV, AVOD, FAST, just don’t call it late for dinner! Ad-supported, studio-produced, premium, long-form content with high CPMs is alive and well: “TV” is just split across more channels: airwaves, cable and streaming. The collective linear + digital video ad market remains a growth business.

**Measurement, metrics and more. Topics to be covered:**

- Are GRPs still the currency? What is the future of linear reach / frequency measurement?
- What adoption does audience-based buying and addressable targeting have in the linear TV market?
- How will buying practices across linear and digital channels further converge and net out? Upfronts? Programmatic?
- How best will advertisers measure ROI across linear & digital TV channels? RCT incrementality experiments, anyone?

**“Video” is the new “TV,” and it’s a growth market**

Audiences have been shifting away from “linear” television (broadcast and cable) content delivery for years. Yet, the same top TV studios are also deep in the shift to premium streaming video. The phrase “TV” is out of fashion with executives, who speak of “Video” instead. Convergence is here.

Video is the dominant format of advertising. The combined digital video and linear video ad formats represent 58% of the national advertising market, according to Standard Media Index’s Video Convergence Report. Spending on all non-video ad formats combined – print, OOH, search, social, programmatic display, etc. – is only 42% of national ad spend. Linear TV accounts for 36% of ad spend, and digital video for 22% of the overall SMI Pool total.

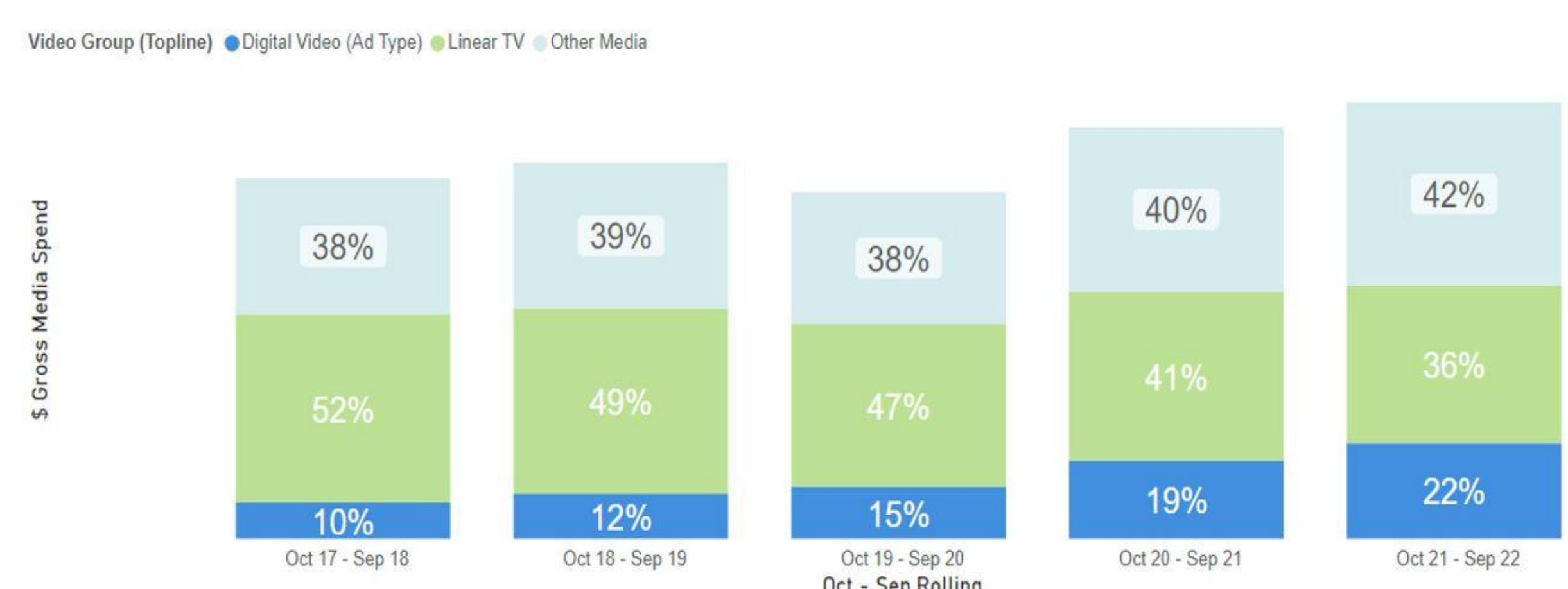
Unlike newspapers, which were unready for the immediate threat the Internet represented to their ad revenue, TV giants have prepared for this moment for years. They remain the biggest recipients of national video ad dollars. But while they are building their streaming ad revenue fast, they compete for online video dollars with digital behemoths including Google, Meta and Amazon.

Addressable video audience targeting online and in linear, is rising at the same time as digital privacy concerns. But connected TVs (CTV) and cable set-top boxes (STB) fall conveniently outside of the control of the most aggressive enforcer of privacy, Apple.

With or without household addressability, advertisers can measure the true ROI of linear and streaming video more easily than most realize. Rick will comment on how randomized controlled trails (RCT), the gold standard of experiment-based measurement, are feasible today in all forms of video ads.

Digital Video ads rose to 22% of overall market dollars, a new high share of the mix, as Linear TV ebbed to a new low.

**SMI Pool Ad Spend: Video Breakout vs. Other Media**  
Oct 2021 – Sep 2022 vs. Prior Periods



\*Source: Standard Media Index, Video Convergence Report, 2023\*

**Roundtable Chairs**



**Rick Bruner**  
CEO,  
Central Control

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**Brian Lin**  
Senior Vice President of  
Product Management,  
Advertising, Univision  
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**Rick** is a long-time advertising research leader. He is the Vice Chair of I-COM for the U.S. and founder of the Research Wonks forum. His passion for true incrementality measurement of advertising ROI led him to found Central Control, which provides software and service to run high-quality ad experiments. He is also the Head of Insights & Analytics at Standard Media Index, which benchmarks spending and pricing for national advertising.

Brian Lin serves as the Head of Product management within TelevisaUnivision’s advertising sales organization focusing on strategy and productization of new capabilities across the advanced advertising ecosystem. In his role, Lin is focused on building or partnering to enable capabilities across DDL, Addressable, New Interactive Ad formats, and commerce. Prior to joining Univision, the 10-year industry veteran led product innovation for companies like VideoAmp, Viacom, OpenAP, Cablevision, and most recently, MadHive, where he served as Chief Product Officer.