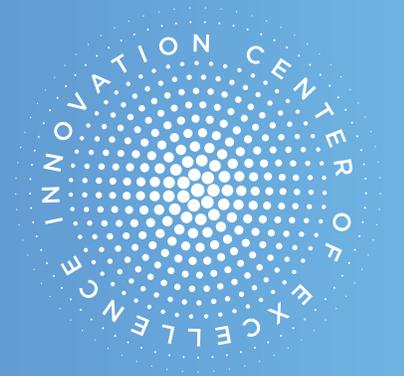


# 2019 TV & VIDEO TRENDS TO WATCH



## 1 TV IS DOWN, BUT NOT OUT

The challenges that traditional TV has faced over the past few years will continue on the same path in 2019. The cord cutting and cord shaving trend continues to erode the linear TV viewership base, as consumers can curate their own content experiences in more commercial free environments. Linear TV ratings have remained on a gradual decline amid fierce competition and increased fragmentation. Younger audiences will continue to be the most challenging to reach in this medium. But, TV's effective and efficient reach remains massive.

## 2 LINEAR TV MARKET WILL REMAIN STRONG

Despite the viewership headwinds, we foresee traditional TV sustaining a steady advertiser demand with a slight dip in overall TV advertising spend in 2019. This spending momentum is aided by Direct to Consumer (DTC) brands who need to reach audiences at scale and established brands who are concerned about digital supply chain challenges and recognize linear TV's ability to drive their ROI.

## 3 IF YOU CREATE IT, THEY WILL WATCH

Programming from the large media companies will be resilient. Tentpole TV franchises and sports still garner strong viewership on both linear and digital platforms. 2019 will be the critical year as the content arms race gets more intensified. More professional original content will be created than ever before. Top tech challengers will compete for international and domestic sports rights and increasingly pivot to big budget original content production.

## 4 MANAGING THE ATTENTION ASSET OF OUR CONSUMERS

To improve the consumer experience, video ad format innovations will continue to evolve. Given the increasingly shortened attention span and unprecedented access and choice, shorter video ads and reduced ad loads will be more of the norm, as opposed to the experiment. Interactive, shoppable video units and sequential messaging will also be more widely available in the marketplace thanks to ACR technology and identity-based targeting.

## 5 TV IS A PLATFORM AND BECOMES MORE IP BASED

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The Advanced TV space is expected to grow and expand at a rapid pace. The technology platforms and advanced data capabilities will further streamline and optimize linear TV's planning, targeting, buying and measurement process as well as workflow. Data-driven linear, addressable TV, programmatic TV and OTT/Connected TV will continue to gain advertiser budgets for the benefits of a premium viewer experience and precision targeting.

## 6 VIEWERS WILL DECIDE HOW THEY WANT TO WATCH

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Viewership will continue to flow to the Connected TV/OTT platforms and content owners / distributors will race to launch OTT services as Direct-To-Consumer offerings (Disney, Warner Media, NBCU, Amazon, etc). As the video ecosystem becomes more fragmented, the ad-supported vs. subscription debate will be tested out in the marketplace with no one clear winner emerging. Virtual MVPDs, aka skinny bundles, will grow as an alternative to traditional cable and satellite television in response to consumer's cord cutting/shaving trends and their desire to create their own schedules by watching what they want, when they want to.

## 7 PROVE YOUR ACCOUNTABILITY

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Cross-platform video measurement and attribution will become a pivotal focus in the pursuit of media accountability and advertiser trust. Traditional linear TV, best known for its massive reach and upper-funnel branding impact, has increasingly incorporated performance measures with a focus on business outcomes. Ad tech companies (DSP's or CTV/OTT vendors) will also look to enhance TV attribution models.

## 8 AUDIENCE AND AUTOMATION TAKE CENTER STAGE

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The increase in available data will push transacting on audience guarantees into the main stream and automation will continue to be paramount in allowing for audience-based buying in the most effective and efficient way possible. The two will work hand in hand as the programmatic linear TV and video bought on audiences continues to increase.

## 9 SHORT FORM PROVING LONG FORM WORKS

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Social platforms that used to specialize in short form and snackable video content will continue to pivot to long form video and live streaming, such as Facebook Watch, IGTV, Stories. Augmented reality will also play a critical role in increasing viewer engagement.

## 10 CAPTURE THE ELUSIVE eSPORTS AUDIENCE

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eSports, live streaming of gaming events that capture millions of viewers, will present another immensely powerful advertising and sponsorship opportunity for brands to target and connect with a highly engaged, elusive, and desirable audience.

*Credit to DAN Video Innovation Council and Amplifi Video Investment.*

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