



DCN Over-the-Top Video Benchmark and Best Practices Report 2018

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digitalcontentnext.org

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Executive Summary

As streaming products have taken hold of the video marketplace, over-the-top (OTT) — the distribution and consumption of video distributed over the internet to connected devices — has become a strategic, high-growth opportunity for digital publishers. Digital publishers from the TV and cable industry are following their viewers as consumers shift video viewing to OTT channels and devices (i.e. streaming devices and smart TVs), while publishers outside the TV and cable industry are also participating, looking for opportunities for diversification and growth.

All publishers in this report are developing their own branded OTT products. Most are advertising-based, video-on-demand (AVOD) products — such as WatchESPN and Newsy's OTT app — and focus primarily on leveraging current assets. These OTT products help publishers mitigate the loss of audience and revenue from traditional broadcast and cable channels, serve their current viewers and attract younger, more valuable audiences.

Fewer publishers are developing subscription-based, video-on-demand (SVOD) products, such as CBS All Access and NBC Sports Gold. While branded SVOD products offer revenue diversification opportunities for all publishers, they require higher levels of investment in original content and marketing. Publishers distribute their branded OTT products directly from their own sites as well as through streaming devices and smart TVs like Roku and Samsung that provide access to content to enhance their consumer value.

Publishers are also distributing content through third-party partners to reach consumers who access OTT content through paid aggregation services and retailers. Publishers are live streaming content to virtual multichannel video programming distributors (vMVPDs) such as

Sling TV, PlayStation Vue and Hulu Live which offer consumers skinny bundles of programming. Depending on their content type, publishers are also licensing libraries to SVOD services such as Netflix and Amazon Prime Video and to retailers offering download-to-rent and download-to-own content (DTR/DTO) such as Amazon Prime Video and Walmart VUDU.

OTT is in its early stages and publishers face a range of challenges in trying to monetize it through advertising and subscription sales. Publishers sell advertising for their own branded products as well as for content they distribute through vMVPDs and SVOD services (e.g. Hulu). OTT digital ad sales has been hindered, however, by fragmentation, lack of uniformity, varying levels of support by distribution partners and complexity of dynamic advertising insertion (DAI) integration. This is particularly the case for live streamed, as opposed to the video-on-demand (VOD) content (e.g. short form clips and content libraries), in branded products and vMVPD offerings. The SVOD business model depends on consumer subscription marketing capabilities that are not traditionally found in TV and cable companies. In addition, publishers face data disintermediation by device, vMVPD and retail partners.

Participating publishers reported that OTT advertising revenue they sold represented an average 15 percent of total digital division revenue, just under a third of video ad revenue in 2017¹. Companies providing data are projecting OTT growth rates of a weighted 62 percent for 2018 compared to 2017. Branded AVOD represents the vast majority of publisher sales of digital advertising revenue due to the higher degree of DAI integrations with device partners and/or levels of VOD content viewing in comparison to vMVPD partners.

¹ Ad revenue for publishers' direct and third-party sales for branded OTT and third-party vMVPD and hybrid SVOD services is benchmarked as a percent of total publisher digital revenues. This report does not include branded OTT SVOD subscription revenue from direct sales or revenue share from third-party sales (e.g. Amazon Prime Channels), or licensing and revenue share for third-party SVOD services (e.g. Netflix), download-to-rent or download-to-own (e.g. Amazon Prime Video).

EXECUTIVE SUMMARY

Core Challenges

- 1 Most publishers decentralize their OTT business between digital operations, corporate distribution, and licensing — and frequently between major divisions and/or brands as well — making it hard to coordinate OTT strategies, commit to investments and recognize operational economies.
- 2 Resource constraints impact branded product development for some publishers with respect to:
 - the operational labor intensity of complex content distribution and DAI integrations for multiple brands, distribution partner operating systems, and devices; and
 - the substantial investments required for original content, marketing and staff to scale, as well as for the development of subscription funnel management and retention capabilities for branded SVOD products.
- 3 The evolving OTT ecosystem does not yet fully support digital advertising because:
 - DAI is available on major streaming device platforms, but it is not available on all vMVPDs;
 - When DAI is available, it may not be supported by fully-integrated ad serving, third-party measurement or the availability of data for targeting; and
 - Publisher integrations are complicated and may result in poor user experiences and/or service to advertisers.
- 4 Consumer touch points for marketing branded products and developing loyal usage are fragmented across devices and platforms, often resulting in low adoption and high churn rates.
- 5 Cable network publishers, in particular, need to delicately navigate their relationships with multichannel video programming distributors (MVPDs) when developing branded OTT products (e.g. branded SVOD, branded skinny bundles, integrated branded AVOD products) to protect their interests on traditional platforms where they still make the majority of the revenue.

Consumer touch points for marketing branded products and developing loyal usage are fragmented across devices and platforms, often resulting in low adoption and high churn rates.

EXECUTIVE SUMMARY

Best Practices

1

Prioritize the development of OTT initiatives at the executive level of your company management to coordinate strategic trade-offs, commit resources, evolve management structures, foster risk taking and negotiate with key industry players.

2

Focus on OTT branded products and distribution that leverage and support your core business, are replicable and/or have the potential to scale:

- Use branded AVOD apps and vMVPD distribution to offset audience and revenue loss from traditional broadcast and cable distribution and to gain younger, more valuable audiences;
- Consider developing branded SVOD products based on:
 - the ability to develop premium, original and/or exclusive content;
 - the opportunity to scale and/or super serve stable user bases of enthusiasts or fans; and
 - the potential to leverage subscriptions for corporate data initiatives.

3

Negotiate with device, vMVPD and retail partners for business requirements that support scaling as well as overall corporate strategic goals as appropriate, including:

- full ad server integration;
- full third-party advertising and audience measurement integration;
- reciprocal data rights for advertising and subscription monetization on and off platform;
- advertising, marketing and promotion commitments for branded products as well as content licensed and/or distributed through third-party services and retailer.

4

With branded products and vMVPDs:

- Take advantage of opportunities to drive digital ad revenue by implementing DAI advertising with VOD content; and
- Balance opportunities for DAI advertising in live-streamed content with the ease of pass-through advertising, the degree of difficulty with implementing DAI operationally, and the goals of maintaining the user experience and serving the advertiser.

5

Manage OTT ad sales within the context of the evolving addressable² programmatic world:

- Develop cross-platform sales capabilities; and
- Integrate OTT data into corporate data initiatives for cross-platform advertising targeting capabilities.

² Technologies that allow the use of audience-level data to serve different ads to different audiences watching the same programming delivered digitally via a connected device or set top box. The IAB Video Advertising Glossary, 2016, IAB.

Participating DCN Members



DCN thanks all of those who took the time to share their data, thoughts and opinions for this research. It is greatly appreciated.

Background

Streaming products have taken hold of the video marketplace. Consumers are shifting video viewing from traditional broadcast and cable to OTT channels and devices with an estimated 26 percent of US adult daily video viewing in 2018 projected to be on digital video devices.³ Just under 200 million US internet users are expected to use a video service at least once a month in 2018,⁴ while cord-cutters and cord-nevers — a disproportionately young group — are expected to reach a combined 63.4 million US adults.⁵

Extensive licensing of movie, TV and cable network content libraries has helped fuel the rise of SVOD services including Netflix and Amazon Prime Video. These services are driving consumer expectations for premium content services without advertising. In turn, these services are also making immense investments in original content creation and have become more directly competitive with traditional TV and cable networks, while driving programming costs up by competing for talent as well as scripted and licensed content.⁶ vMVPDs are offering consumers skinny bundles of programming at cheaper rates than offers from traditional MVPDs such as AT&T/Direct TV and Comcast. In the wake of consumers cancelling their subscriptions, MVPDs are expected to trim back their channels, threatening the niche and specialty programmers that are carried in add-on tiers.⁷

OTT distribution and monetization offers digital publishers from all segments significant opportunities for

revenue growth. While still the largest source of revenue, broadcast and cable networks are experiencing a loss of viewers and revenue through traditional broadcast and cable distribution channels. Programmers are increasingly extending into OTT distribution to serve and maintain current audiences and to gain younger viewers through branded OTT products and third-party vMVPDs. Attracted by new growth opportunities and the lure of first-party consumer data, digital publishers from the TV and cable segments are also hedging their bets by launching branded SVOD products and skinny bundles.⁸ Digital publishers from the pure play and print segments are riding on their coattails, looking for opportunities for growth and exploring licensing and/or retail distribution through third-party SVOD services and DTR/DTO channels for cash flow.

Consumers are embracing OTT which has resulted in digital publishers from TV, cable and other segments to lean in to direct and third-party distribution, however monetization of OTT is in its early stages. While OTT advertising and branded OTT subscription revenue models will likely converge in a linear addressable future, right now they present challenges: The OTT digital advertising ecosystem is unevenly developed, DAI integrations are complicated, the SVOD business model requires deep consumer subscription marketing capabilities not traditionally found in TV and cable companies and publishers face data disintermediation by device, vMVPD and retail partners.

³ eMarketer, September 2017. Includes time spent with watching video via game console, connected TV or OTT device, as well as by desktop/laptop or mobile device.

⁴ eMarketer, July 2017, "Programmatic Connected TV And OTT Video Advertising: Automation, Audience Attracts Digital And TV Ad Buyers." Reflects individuals of any age who watch video via any app or website at least once per month that provides streaming video content over the internet and bypasses traditional distribution; examples include HBO Now, Hulu, Netflix and YouTube.

⁵ eMarketer, July 2017.

⁶ "Four reasons why content fiscal discipline just a dream for cable," Colin Dixon, December 5, 2017, nScreenMedia.

⁷ "TV's Dead Zone: How the Cable Sector Is Killing Off Struggling Networks," Cynthia Littleton and Daniel Holloway, March 21, 2017, Variety.

⁸ "Viacom, Discovery, A+E, Scripps and AMC Team Up for Sports-Free Skinny Bundle," Jason Lynch, November 14, 2017, AdWeek.

BACKGROUND

Objectives

DCN commissioned the **OTT Video Benchmark and Best Practices Report** to support publishers as they increase their investment in distribution of OTT products and channels. Key questions this research set out to answer include:

- To what degree are OTT strategies competitive and/or complementary to traditional broadcast and MVPD distribution business models?
- What branded AVOD and SVOD OTT products are publishers developing?
- What are publishers' content, product, and marketing strategies and what are best practices?
- Which third-party retail and distribution partnerships are important for publishers' branded OTT businesses and what accommodations are important to negotiate?
- Which third-party SVOD and virtual MVPD services are publishers distributing to?
- How are publishers selling and delivering advertising into branded OTT products and vMVPD content and what are best practices?

Methodology

DCN hired Eleanor Powers, Powers Media & Entertainment Consulting, to conduct proprietary research on OTT video content distribution and monetization with its members. Sixteen DCN members provided data and/or answered survey questions: 13 TV/cable companies and three magazine and pure play companies. Interviews were conducted with nine companies to gather more in-depth insights. Data and information from interviews has been aggregated and anonymized to protect confidentiality.

Ad revenue for publishers' direct and third-party sales for branded OTT and third-party vMVPD and hybrid SVOD services is benchmarked as a percent of total publisher digital revenues. This report does not include branded OTT SVOD subscription revenue from direct sales or revenue share from third-party sales (e.g. Amazon Prime Channels), or licensing and revenue share for third-party SVOD services (e.g. Netflix), download-to-rent or download-to-own (e.g. Amazon Prime Video).

The **2017 DCN Benchmark Report** and the **DCN Paid Content Benchmark and Best Practices Report, H2 2017** have provided additional data and insights on this topic and are available to DCN member companies that participated in those reports.



Summary of Findings

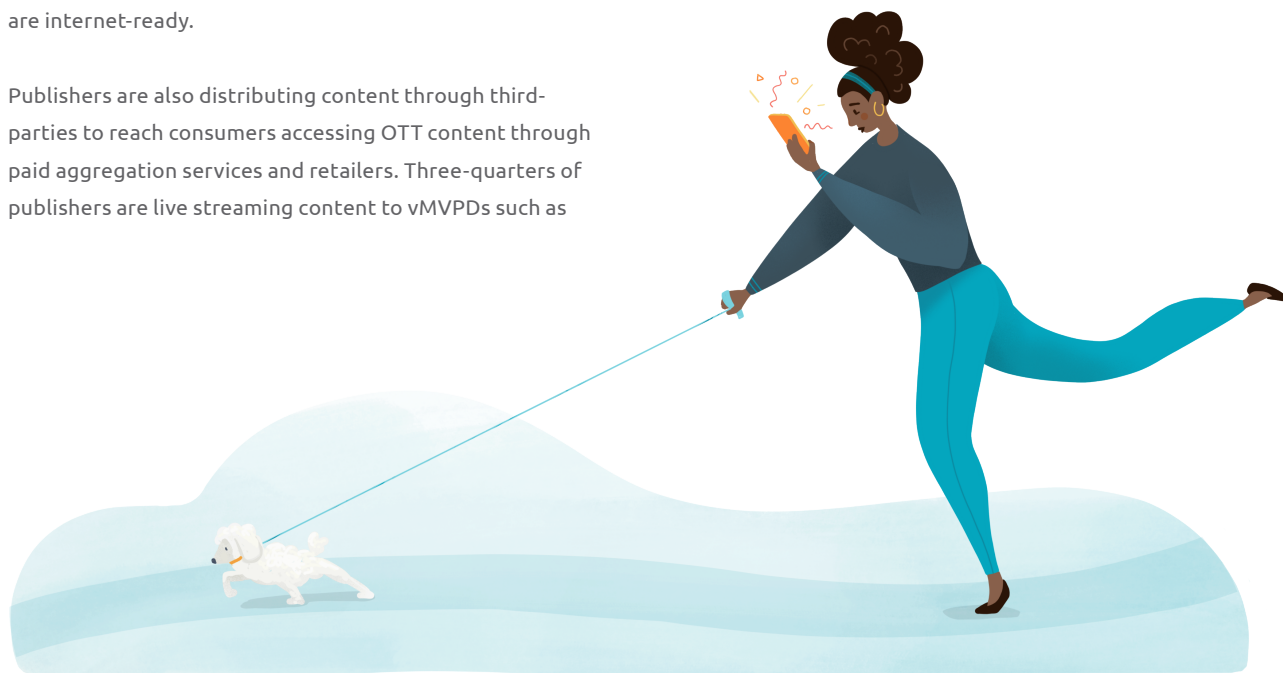
Digital publishers are participating in a range of direct and third-party OTT channels. Publishers are directly developing their own branded AVOD and SVOD products in addition to licensing and/or distributing their content to third-parties to integrate into their own services and retail offerings. Levels of participation are highest in the channels supporting direct monetization for publishers through advertising.

All of the publishers in this report are developing their own branded OTT products. The majority of these are AVOD products such as WatchESPN and Newsy's OTT app. Fewer publishers are developing SVOD products such as CBS All Access and NBC Sports Gold, although activity is ramping up. Most branded OTT products carry the branding of cable or TV networks. Publishers market directly to consumers and distribute their branded OTT products from their own sites. They also distribute through device partners looking to increase the value of their devices and TVs through the content available on them. These include streaming device partners such as Roku, Amazon Fire and Apple TV, whose hardware connects TVs with the internet and online services, and smart TV partners such as Samsung whose TVs are internet-ready.

Publishers are also distributing content through third-parties to reach consumers accessing OTT content through paid aggregation services and retailers. Three-quarters of publishers are live streaming content to vMVPDs such as

Sling TV, PlayStation Vue and Hulu Live which offer skinny bundles of programming. Depending on their content type, they also license libraries to SVOD services such as Netflix and Amazon Prime Video and distribute to retailers offering DTR/DTO such as Walmart VUDU.

Publishers directly monetize OTT through advertising and subscription sales. They sell advertising for their own branded products as well as for content distributed through vMVPDs and SVOD services with advertising (e.g. Hulu). In addition, they sell subscriptions for their own branded SVOD products. Participating publishers reported that OTT advertising revenue sold by publishers represented an average 15 percent of total digital division revenue, or 30 percent of video ad revenue in 2017. Companies providing data project OTT growth rates of a weighted 62 percent for 2018 compared to 2017. Branded AVOD represents the vast majority of publisher sales of digital advertising revenue due to the higher degree of DAI integrations with device partners and/or levels of VOD content viewing in comparison to vMVPD partners.



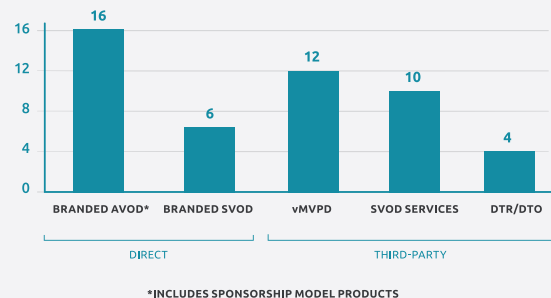
SUMMARY OF FINDINGS

OTT Participation By Channel

Publishers participate in a range of different OTT channels in response to shifting consumer viewing habits. As of the end of 2017, all publishers participating in the study had directly developed their own branded AVOD products, while only six had launched branded SVOD or hybrid SVOD products; an additional three have 2018 SVOD launches. These publishers market and distribute directly to consumers, in addition to leveraging device partners.

Publishers also distribute content through third-parties to reach consumers accessing OTT content through paid aggregation services and retailers. Among third-party channels, levels of participation were highest in vMVPDs, with 12 companies distributing content to skinny bundles; levels of SVOD service distribution were only slightly less with 10 companies. Few companies reported distribution through DTR/DTO channels, a reflection of content type.

Publisher Participation in OTT by Channel
EOY 2017, N=16 PUBLISHERS

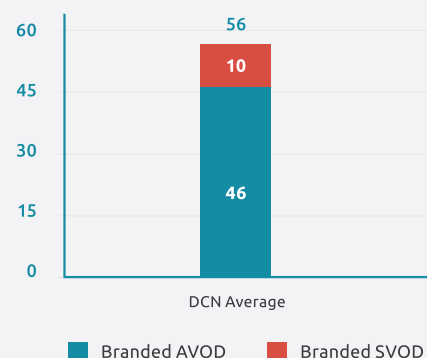


Branded OTT Products

The 16 publishers actively creating branded OTT products reported a total of 56 branded AVOD and SVOD products — an average of 3.5 per company. Of these, 33 are from cable operations and 19 from broadcast operations, while the balance is from companies outside of the TV/cable industry. Branded AVOD products were by far the most prevalent, representing 46 of the total or 82 percent. Examples include WatchESPN, an authenticated product with live streaming, and windowed and library VOD content, and Newsy, an unauthenticated app with short-form content streamed together. Of the AVOD products, the majority (63 percent) are TVE products requiring sign-up or authentication — a sign-in process to verify MVPD subscription — to view live streaming or VOD content.

SVOD products accounted for 10 out of the total 56 branded OTT products, or less than 20 percent. Examples include CBS All Access, which has an ad-supported as well as an ad-free version, is authenticated, has live streaming and includes original content. In contrast, A+E's History Vault has deeply curated content and library access, without live streaming or authentication. Taking into account the 2018 SVOD introductions, cable companies have developed more SVOD products than broadcast companies.

Total Branded OTT Products Reported
EOY 2017, N=16 PUBLISHERS



As of the end of 2017, all publishers participating in the study had directly developed their own branded AVOD products, while only six had launched branded SVOD or hybrid SVOD products;

SUMMARY OF FINDINGS

The Importance Of OTT Advertising Revenue

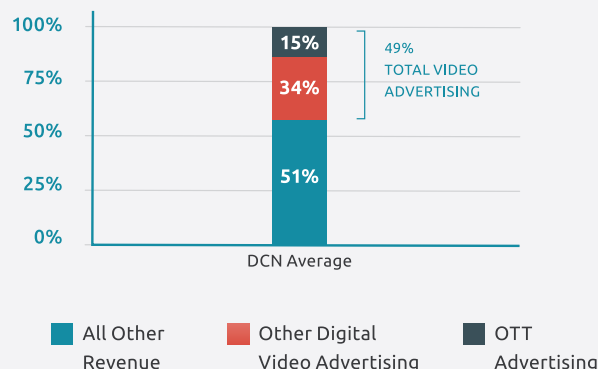
Video ad revenue is a high-growth opportunity for digital publishers, representing an estimated 49 percent of total 2017 digital revenue for 13 companies providing revenue data in this study.⁹ OTT advertising revenue represents an average 15 percent of total digital division revenue, or 30 percent of video ad revenue. An estimated one-quarter of these companies are at the early stages of developing branded OTT digital advertising with this revenue stream representing less than five percent of digital revenue. Nine companies providing data project OTT ad revenue growth rates of a weighted 62 percent for 2018 over 2017.

While subscription revenue is not included in this report, publishers are also beginning to derive considerable revenue from branded SVOD subscriptions. In Q4 2017, NBC signaled to the press that subscriptions for NBC Sports Gold were “well into the six figures”, and in Q1 2018, CBS reported that CBS All Access had two million subscribers for both the ad-light and ad-free versions combined.^{10,11} At annualized subscription prices of \$49.99 for NBC Sports Gold, and \$71.88 and \$119.88 for CBS All Access’ ad-light and ad-free versions respectively, this starts to add up to serious money. Six companies that participated in this research had branded SVOD products in 2017 while three are introducing them in 2018.

Publishers sell advertising for their own branded products as well as for content distributed through vMVPDs and hybrid SVOD services that include advertising (e.g. Hulu). The vast majority of publisher OTT digital ad revenue is from branded OTT products, representing an estimated 87 percent of the total OTT digital ad revenue, while publisher-sold vMVPD and hybrid SVOD service digital ad revenue represents an estimated 13 percent. This reflects higher levels of publisher use of DAI integrations with device partners and/or higher levels of VOD content viewing in branded products in comparison to vMVPD partners, signaling the growth that will be unlocked for digital ad sales as the device and vMVPD ecosystem becomes more supportive of DAI. Third-party sales represent virtually none of the total OTT digital ad revenue, as device and vMVPD partners are mostly remunerated through inventory shares which have no publisher P&L impact.

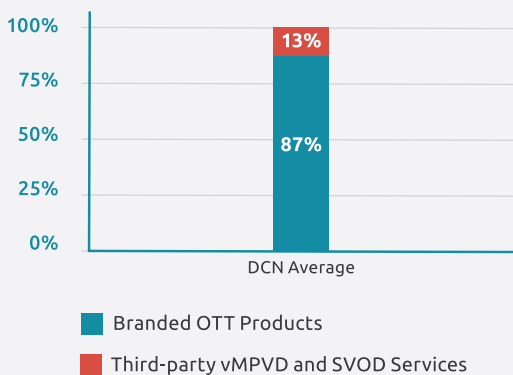
Percent Total Digital Revenue from OTT Advertising per Company

2017, N=13 PUBLISHERS



Percent of Publisher OTT Digital Ad Revenue by Source

2017, N=13 PUBLISHERS



⁹ Ad revenue for publishers’ direct and third-party sales for branded OTT and third-party vMVPD and hybrid SVOD services is benchmarked as a percent of total publisher digital revenues. This report does not include branded OTT SVOD subscription revenue from direct sales or rev share from third-party sales (e.g. Amazon Prime Channels), or licensing and revenue share for third-party SVOD services (e.g. Netflix), download-to-rent or download-to-own (e.g. Amazon Prime Video).

¹⁰ “Big EPL Games Moved to Pay Service NBC Sports Gold in an Effort to Boost Revenue,” November 28, 2017, Sports Business Daily.

¹¹ “Targeting ‘superfans’: how CBS is aggressively embracing streaming,” February 26, 2018, Sahil Patel, Digiday.

SUMMARY OF FINDINGS

Core Challenges

- Most publishers decentralize their OTT business between digital operations, corporate distribution, and licensing, and frequently between major divisions and/or brands as well, making it hard to coordinate OTT strategies, commit to investments and recognize operational economies.
- Resource constraints impact branded product development for some publishers with respect to:
 - the operational labor intensity of complex content distribution and DAI integrations for multiple brands, distribution partner operating systems and devices; and
 - the substantial investments required for original content, marketing and staff to scale, as well as for the development of subscription funnel management and retention capabilities for branded SVOD products.
- The evolving OTT ecosystem does not yet fully support digital advertising:
 - While DAI is available on major streaming device platforms, it is not available on all vMVPDs;
 - When it is available, DAI may not be supported by fully-integrated ad serving, third-party measurement or the availability of data for targeting;
 - Publisher integrations are complicated and may result in poor user experiences and/or service to advertisers.
- Consumer touch points for marketing branded products and developing loyal usage are fragmented across devices and platforms, often resulting in low adoption and high churn rates.
- Cable network publishers, in particular, need to delicately navigate their relationships with multichannel video programming distributors (MVPDs) when developing branded OTT products (e.g. branded SVOD, branded skinny bundles, integrated branded AVOD products) to protect their interests on traditional platforms where they still make the majority of the revenue.

Consumer touch points for marketing branded products and developing loyal usage are fragmented across devices and platforms, often resulting in low adoption and high churn rates.

SUMMARY OF FINDINGS



Best Practices

- Prioritize the development of OTT initiatives at the executive level of your company management to coordinate strategic trade-offs, commit resources, evolve management structures, foster risk taking and negotiate with key industry players.
- Focus on OTT branded products and distribution that leverage and support your core business, are replicable and/or have the potential to scale:
 - Use branded AVOD apps and vMVPD distribution to offset audience and revenue loss from traditional broadcast and cable distribution and to gain younger, more valuable audiences;
 - Consider developing branded SVOD products based on:
 - the ability to develop premium, original and/or exclusive content;
 - the opportunity to scale and/or super serve stable user bases of enthusiasts or fans; and
 - the potential to leverage subscriptions for corporate data initiatives.
- Negotiate with device, vMVPD and retail partners for business requirements that support scaling as well as overall corporate strategic goals as appropriate, including:
 - full ad server integration;
 - full third-party advertising and audience measurement integration;
 - reciprocal data rights for advertising and subscription monetization on and off platform; and
 - advertising, marketing and promotion commitments for branded products as well as content licensed and/or distributed through third-party services and retailers.
- With branded products and vMVPDs:
 - Take advantage of opportunities to drive digital ad revenue by implementing DAI advertising with VOD content; and
 - Balance opportunities for DAI advertising in live-streamed content with the ease of pass-through advertising, the degree of difficulty implementing DAI, and the goals of maintaining the user experience and serving the advertiser.
- Work closely with distribution and retail partners for technical integrations and/or ongoing promotional opportunities.
- Manage OTT ad sales within the context of the evolving addressable¹² programmatic world:
 - Develop cross-platform sales capabilities; and
 - Integrate OTT data into corporate data initiatives for cross-platform advertising targeting capabilities.



¹² Technologies that allow the use of audience-level data to serve different ads to different audiences watching the same programming delivered digitally via a connected device or set top box. The IAB Video Advertising Glossary, 2016, IAB.



Appendix

Glossary

AVOD services:

Advertising supported video on demand services (e.g. Crackle).

Addressable TV:

Technologies that allow the use of audience-level data to serve different ads to different audiences watching the same programming, delivered digitally via a connected device or set top box.³¹

Advanced TV:

A collective term for TV content that includes OTT/Connected TV, Addressable TV, and Addressable VOD (i.e. not distributed through an MVPD to a traditional TV set).³²

Branded OTT products:

Publisher SVOD (e.g. CBS All Access) and AVOD (e.g. WatchESPN) OTT services. Branded AVOD includes authenticated TVE services.

DAI:

Dynamic ad insertion; the insertion of ads into digital, live linear or VOD content.

DTR/DTO:

Download-to-rent and download-to-own services (e.g. Amazon Prime Video).

Freemium Business Model:

the publishing business model that provides advertising-supported content for free with upgrades to exclusive content through paid subscription.

MVPD:

Multichannel video programming distributors; “traditional” video service providers including cable, satellite and telco companies.

OTT:

Over-the-top; loosely, the distribution and consumption of video distributed over the internet (“OTT video”) to a connected device such as a connected TV, desktop computer, laptop computer, mobile phone, or gaming device (“OTT device”).³³

Programmatic TV:

Advanced TV purchased programmatically.

SVOD services:

Subscription video-on-demand services; services that are internet-enabled including Netflix, Amazon Prime, Hulu and Hulu Plus.

Virtual MVPD and skinny bundles:

OTT streaming services, including DIRECTV Now, Sling TV, PlayStation Vue, Hulu Live, and YouTube TV, that offer bundles of lean programming that compete with MVPD offerings.

TV Everywhere:

Streaming or on-demand content that requires authentication as a current subscriber to the provider channel.

³¹ The IAB Video Advertising Glossary, 2016, IAB.

³² IAB Advanced TV Targeting Primer, 2018, IAB.

³³ Over the Top (OTT) Video: An Overview, 2017, IAB.

ABOUT DIGITAL CONTENT NEXT

Digital Content Next (DCN) is the only trade organization dedicated to serving the unique and diverse needs of high-quality digital content companies that manage trusted, direct relationships with consumers and marketers. The organization was founded in June 2001 as the Online Publishers Association (OPA). Comprised of some of the most trusted and well-respected media brands, DCN produces proprietary research for its members and the public, creates public and private forums to explore and advance key issues that impact digital content brands, offers an influential voice that speaks for digital content companies in the press, with advertisers and policy makers, and works to educate the public at large on the importance of quality content brands. Digital Content Next's membership has an unduplicated audience of 256,277,000 million unique visitors or 100% reach of the U.S. online population.*



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* Source: comScore Media Metrix Multiplatform Custom Audience Duplication, December 2017, U.S.

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