

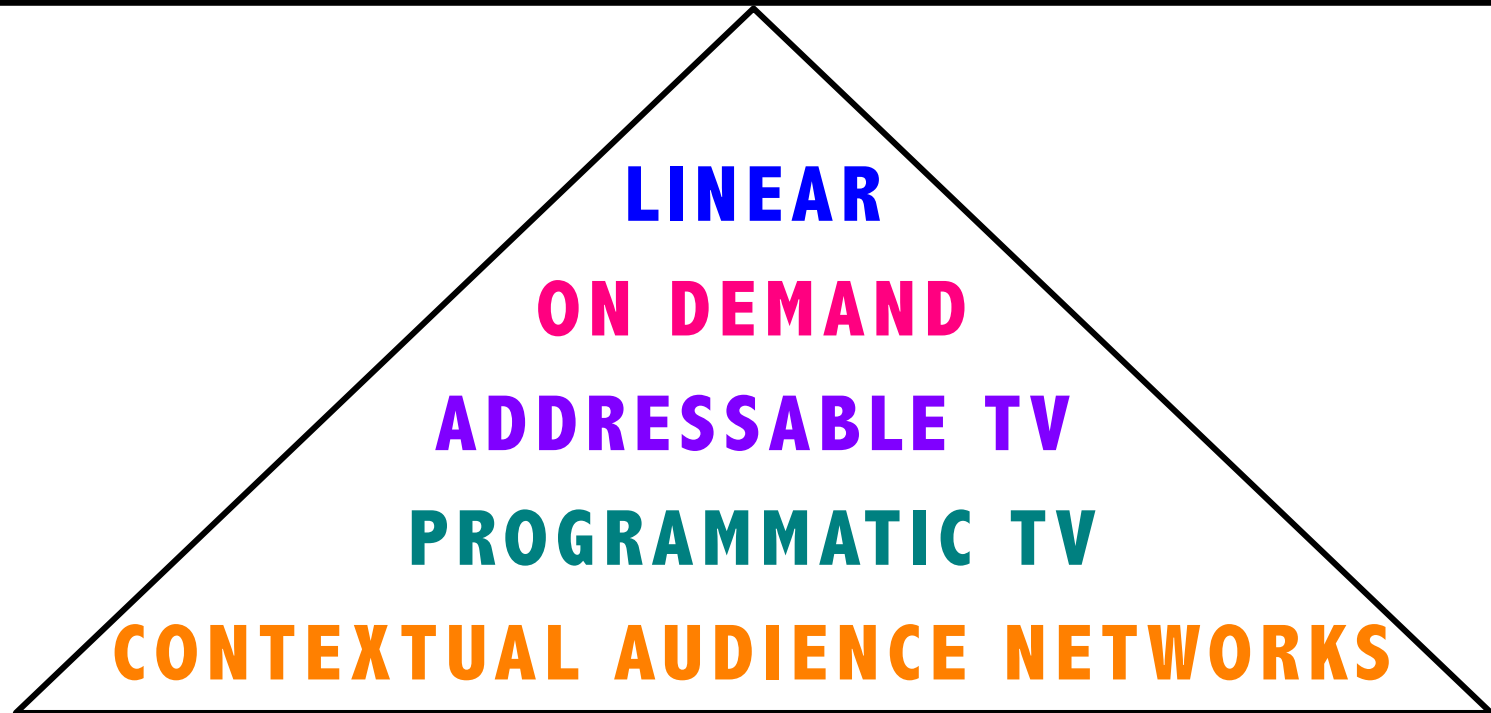
# **BEYOND LINEAR TV**

## **A PRAGMATIC GUIDE**

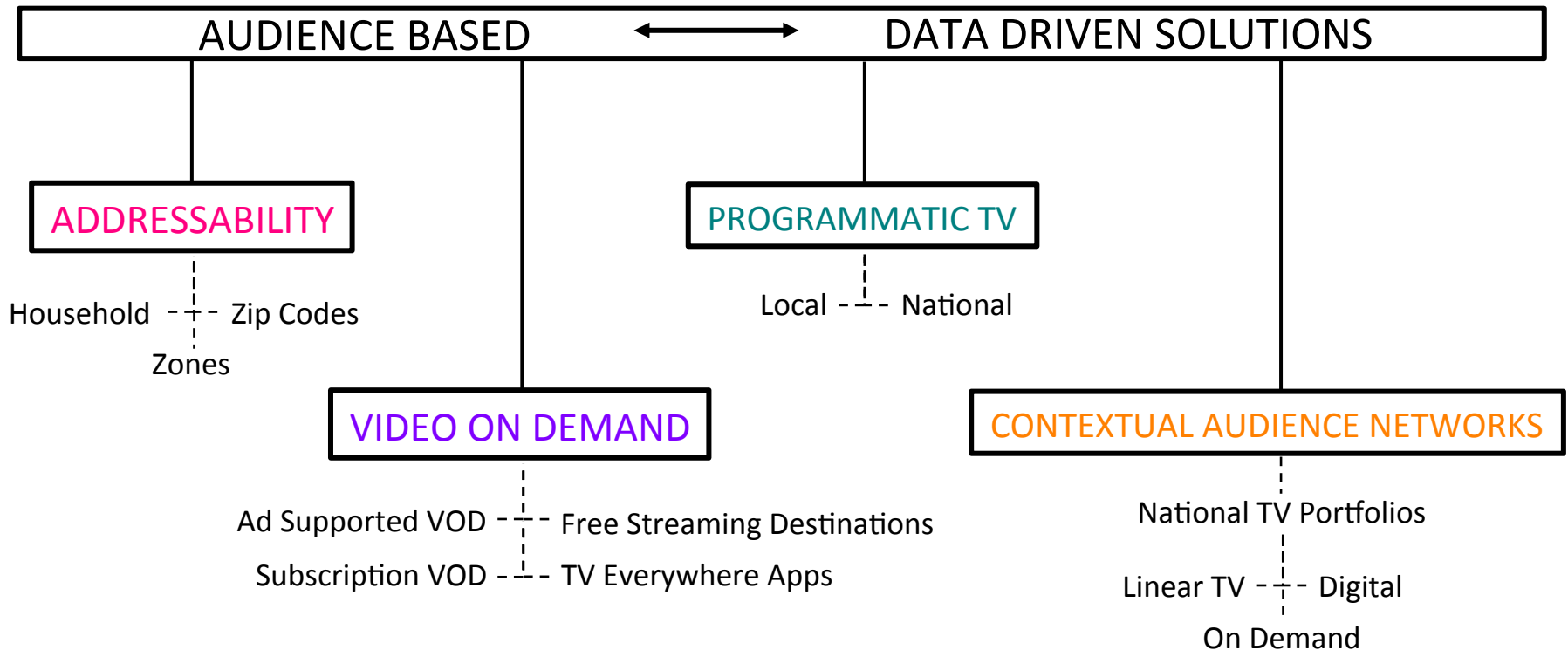
OCTOBER 18, 2017  
Copyright ©HocusFocus

# TV COMMERCIAL BUYING EVOLUTION

TV PROGRAM BASED ← AUDIENCE BASED → DATA DRIVEN SOLUTIONS



# TV COMMERCIAL BUYING EVOLUTION



# CONSUMER CHOICES ARE A CHANGIN'

## **1973-1997 (25 years)**

Handheld Cellphone('73)  
VCR ('75)  
Cable Networks ('76)  
Screenvision ('76)  
Program Guide – EPG ('81)  
AOL ('85)  
DBS ('91)  
Yahoo ('94)

## **1998-2005 (8 years)**

Google ('98)  
HDTV Transmission ('98)  
DVR ('99)  
Netflix DVD ('99)  
Satellite Radio ('01)  
Ad Supported VOD ('02)  
HD DVD/Blu-ray Player ('03)  
MySpace ('03)  
Skype ('03)  
Time Shifted Viewing ('04)  
Facebook ('04)  
YouTube ('05)  
Apple iTunes Video ('05)  
Xbox 360 ('05)  
Telco Video Services ('05)

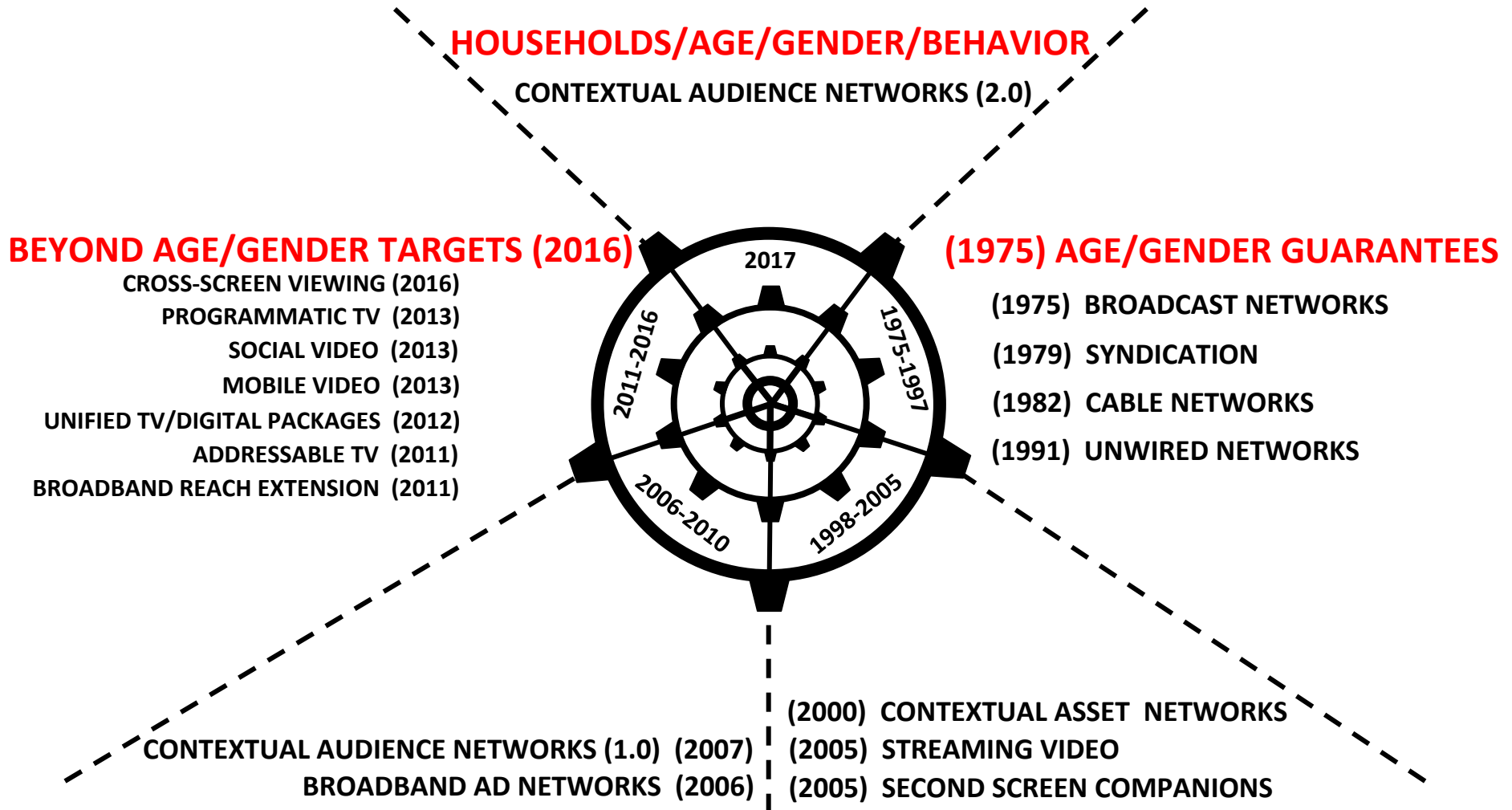
## **2006-2010 (5 years)**

Amazon Prime Video ('06)  
Twitter ('06)  
GetGlue/Second-Screens ('06)  
Amazon Kindle ('06)  
Roku ('08)  
Spotify ('08)  
WhatsApp ('09)  
Apple's iPad ('10)  
Pinterest ('10)  
Pandora ('10)  
Google TV ('10)  
Google Fiber('10)

## **2011-2017 (6 years)**

Apple Siri ('11)  
Smart TV ('11)  
Snapchat ('11)  
Instagram ('11)  
Internet of Things ('13)  
Ultra TV ('13)  
Google Chromecast ('14)  
CBS All Access ('14)  
Amazon Fire TV ('14)  
Oculus/Facebook ('14)  
Amazon Alexa ('14)  
HBO Now ('15)  
Dish's Sling TV ('15)  
AppleWatch ('15)  
Periscope ('15)

# ADVERTISING PLATFORMS/PACKAGES ARE A CHANGIN'

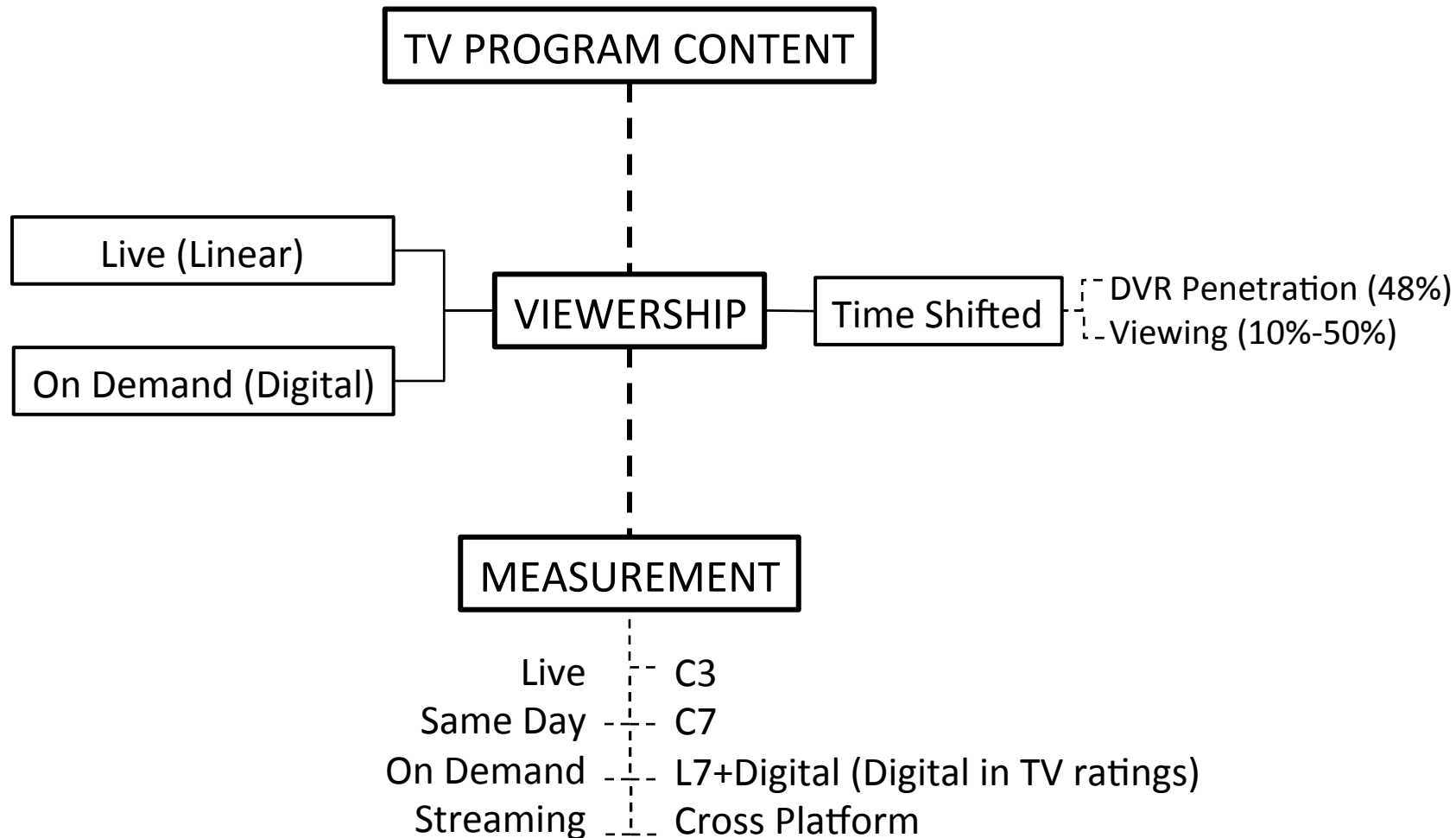


## **TV / VIDEO ADVERTISING SPEND**

<u>SECTOR</u>	<u>DISTRIBUTION</u>	<u>FOOTPRINT</u>	<u>SPEND (BILLIONS)</u>
TV	Broadcast	National	\$18.00
		Local	\$17.00
	Cable	National	\$18.00
		Local	\$7.00
	Syndication	-	\$5.00
	Unwired	-	\$0.30
DIGITAL	-	-	\$9.91
PLACE BASED	Cinema	-	\$0.80
	Other	-	\$0.50
ADDRESSABLE TV	-	-	\$0.50
PROGRAMMATIC TV	-	-	\$0.70

Source: eMarketer, *Broadcasting & Cable*, SNL Kagan, BIA/Kelsey, Nielsen

# TV PROGRAM VIEWERSHIP



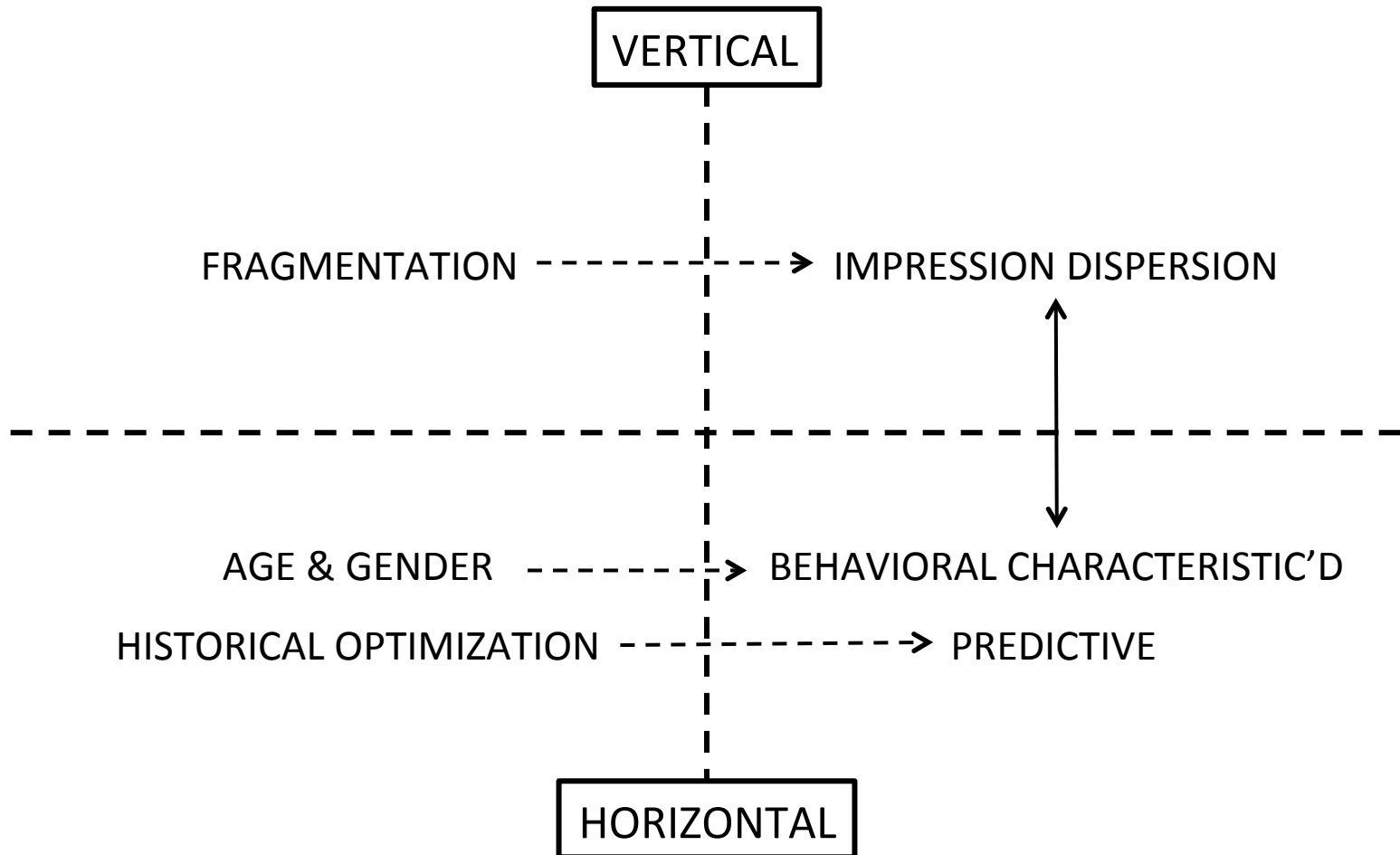
## **MULTI-PLATFORM VIEWERSHIP\***

LIVE + SAME DAY	35%
DVR/VOD DAYS 1-3	29%
DVR/VOD DAYS 4-7	13%
ONLINE 1-35	8%
ONLINE 8-35	15%

\*ABC Primetime Adults 18-49



# HORIZONTAL EVOLUTION



## **DATA SOURCES\***

84.51	IHS	Nielsen Motor Stats
4C	Infogroup	Nielsen NSI
Acxiom	IPSOS	Nielsen NSS
Adara	IRI	Nielsen NTI
Adobe	IRI ProScores	Nielsen 1 to 1 Fusion Panel
Adobe Audience Manager	IXI	NinthDecimal
Affinity Solutions	Kantar	Place IQ
American Express	Kantar Ad Occurrence	Polk
Bluekai	Krux	Prizm
Cardlytics	L2	Proximic
comScore/Rentrak	Mastercard	Quantcast
Crossix	Medicx	Resonate
Datalabs USA	Millard Brown	Scarborough
Datalogix	MRI	Set Top Box Data
e-Tech	MRI Fusion	Shopcom
Epsilon	MRI/ Simmons	Simmons
Equifacts	Neustar	Sorenson (ACR)
Exelate	Nielsen	Speedeon Data
Experian	Nielsen AMRLD	SQAD
First Party Data (CRM)	Nielsen Buying Insights	TiVo
GfK	Nielsen Catalina	VisualDNA
GfK MRI	Nielsen MarketBreaks	YouGov
Gracenote	Nielsen Mobile Vector	

\*Self-reported

# STATISTICAL BABEL FISH

84.51

4C

Acxiom

Adara

Adobe

Adobe Audien

Affinity Solutio

American Expr

Bluekai

Cardlytics

comScore/Ren

Crossix

Datalabs USA

Datalogix

e-Tech

Epsilon

Equifacts

Exelate

Experian

First Party Data (CRM)

GfK

GfK MRI

Gracenote

IHS

Infogroup

IPSOS

IRI

IRI ProScores

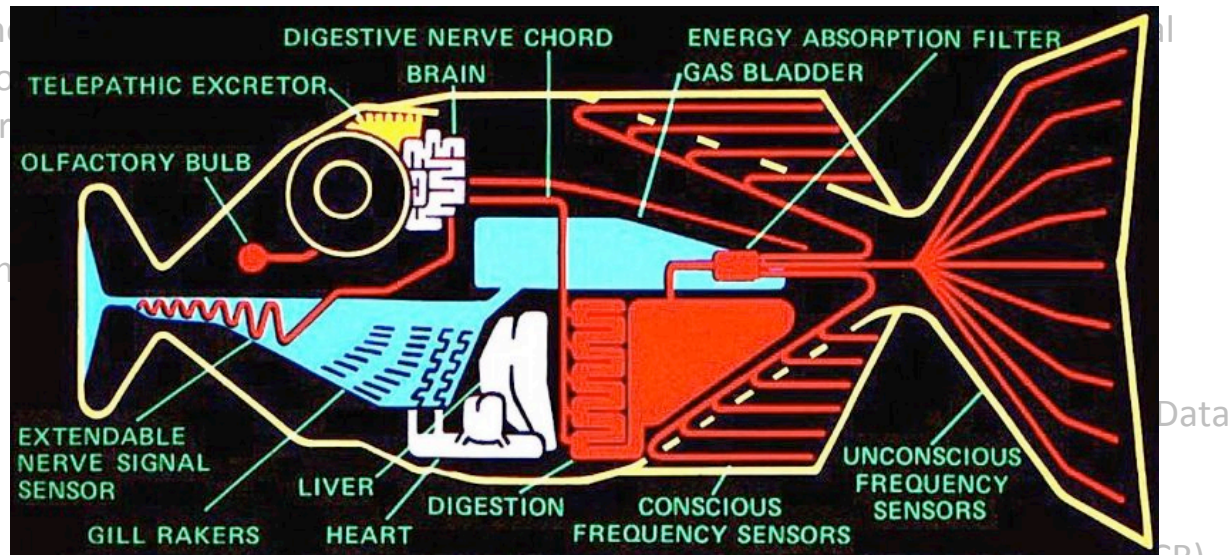
Nielsen Motor Stats

Nielsen NSI

Nielsen NSS

Nielsen NTI

Nielsen 1 to 1 Fusion Panel



Neustar

Nielsen

Nielsen AMRLD

Nielsen Buying Insights

Nielsen Catalina

Nielsen MarketBreaks

Nielsen Mobile Vector

Sorenson (ACR)

Speedeon Data

SQAD

TiVo

VisualDNA

YouGov

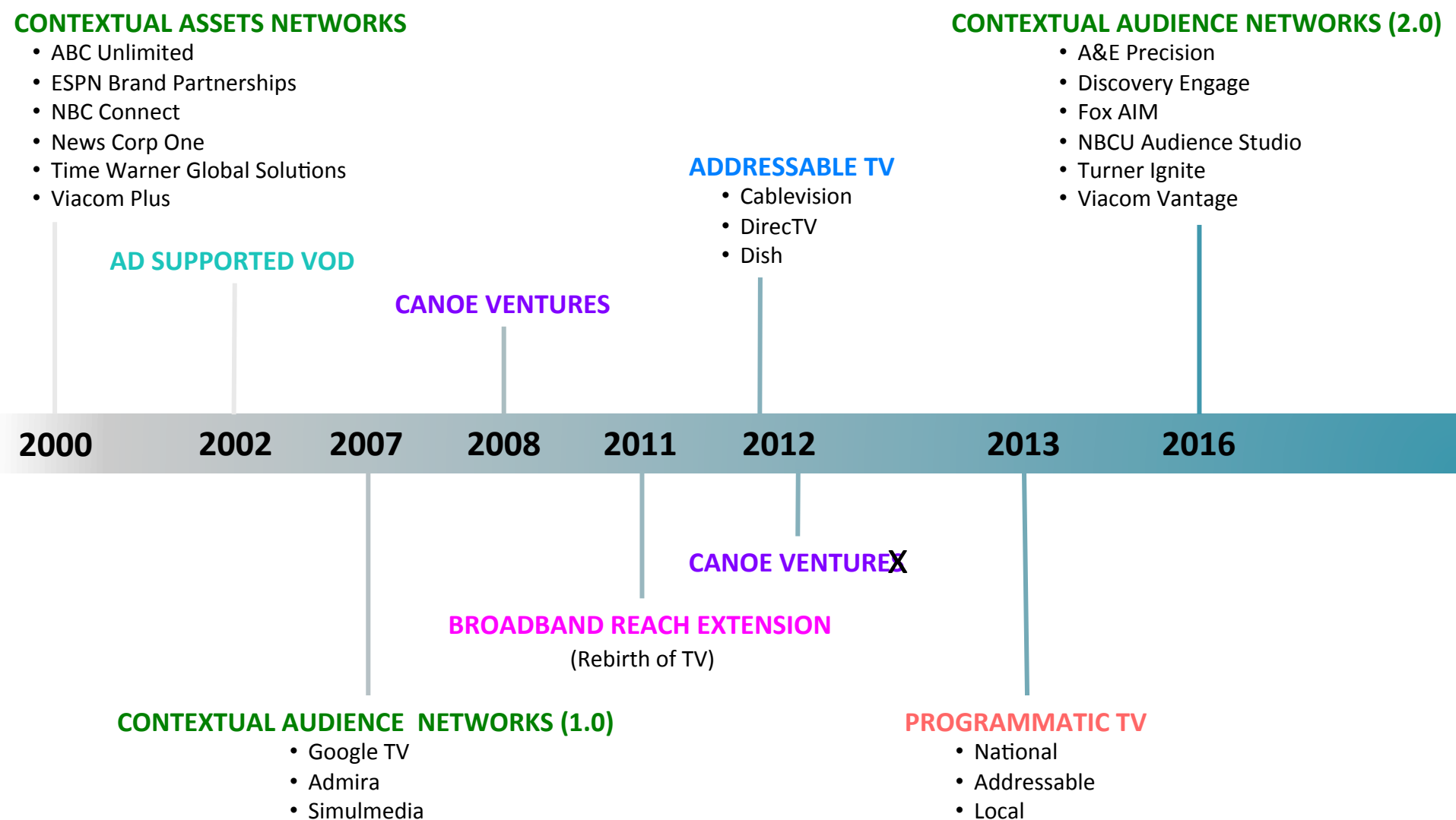
# **MVPD SUBSCRIPTION REVENUE**

## **2011-2017**

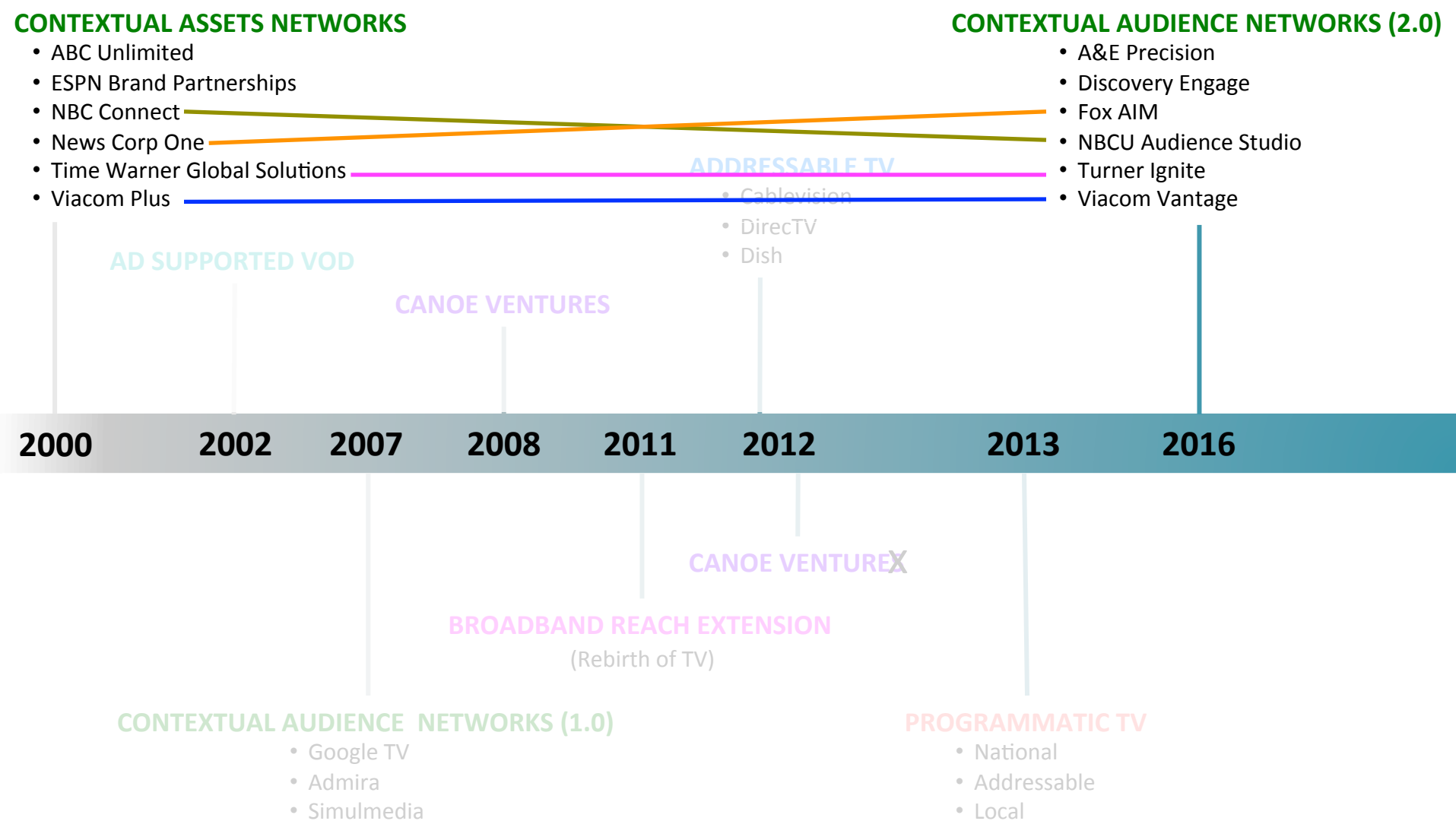
<u>YEAR</u>	<u>REVENUE (BILLIONS)</u>		
	<u>TOTAL</u>	<u>BROADBAND ACCESS</u>	<u>VIDEO</u>
2011	\$91.2	\$43.2	\$48.0
2012	\$94.2	\$46.9	\$47.3
2013	\$96.3	\$49.0	\$47.3
2014	\$99.1	\$51.3	\$47.8
2015	\$101.1	\$53.7	\$47.4
2016	\$101.8	\$55.4	\$46.4
2017 (est.)	\$102.3	\$56.8	\$45.5

Source: PWC, *Multichannel News*

# A 21<sup>ST</sup> CENTURY ADVANCED TV HISTORICAL PERSPECTIVE



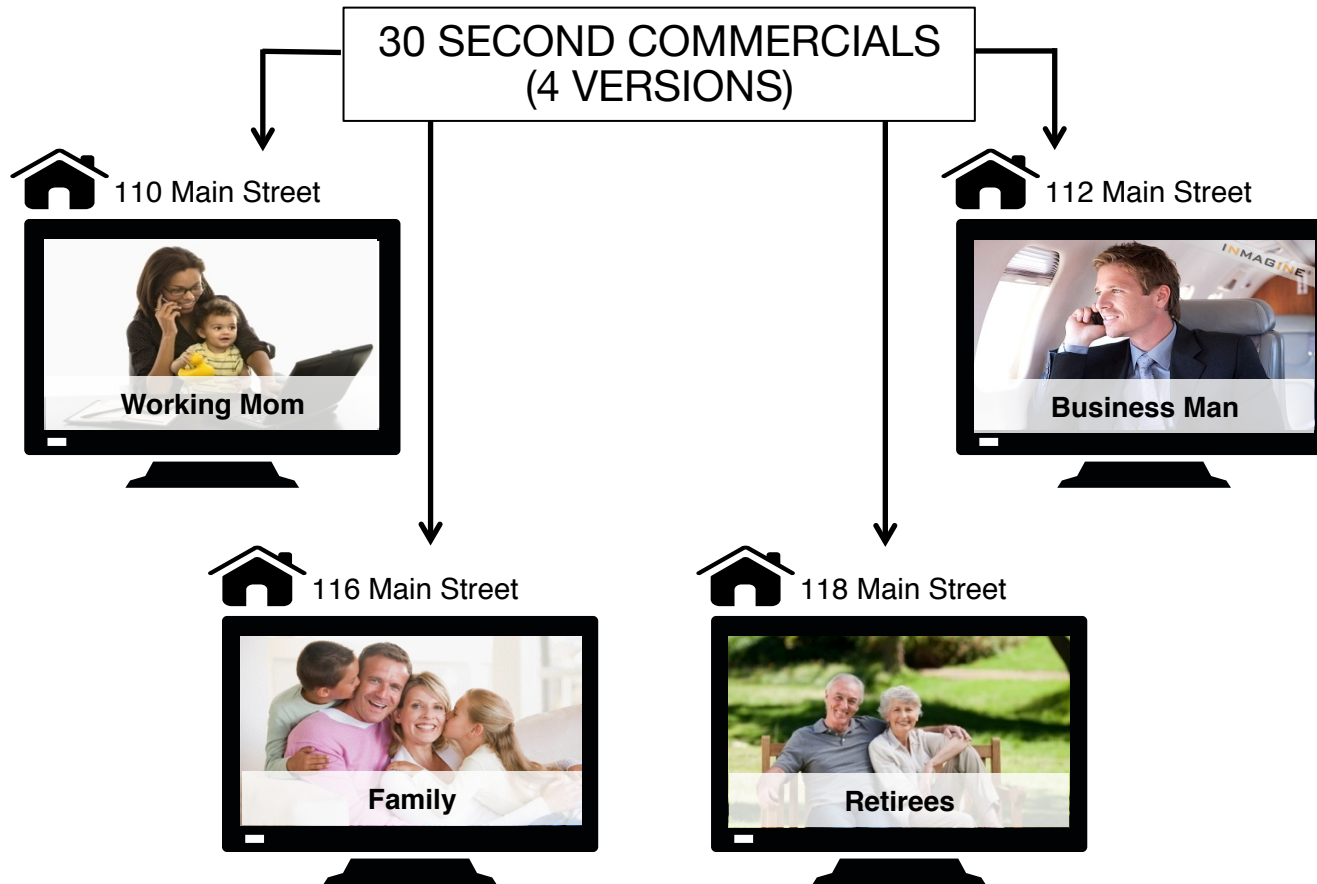
# A 21<sup>ST</sup> CENTURY ADVANCED TV HISTORICAL PERSPECTIVE



# **ADDRESSABLE TV**

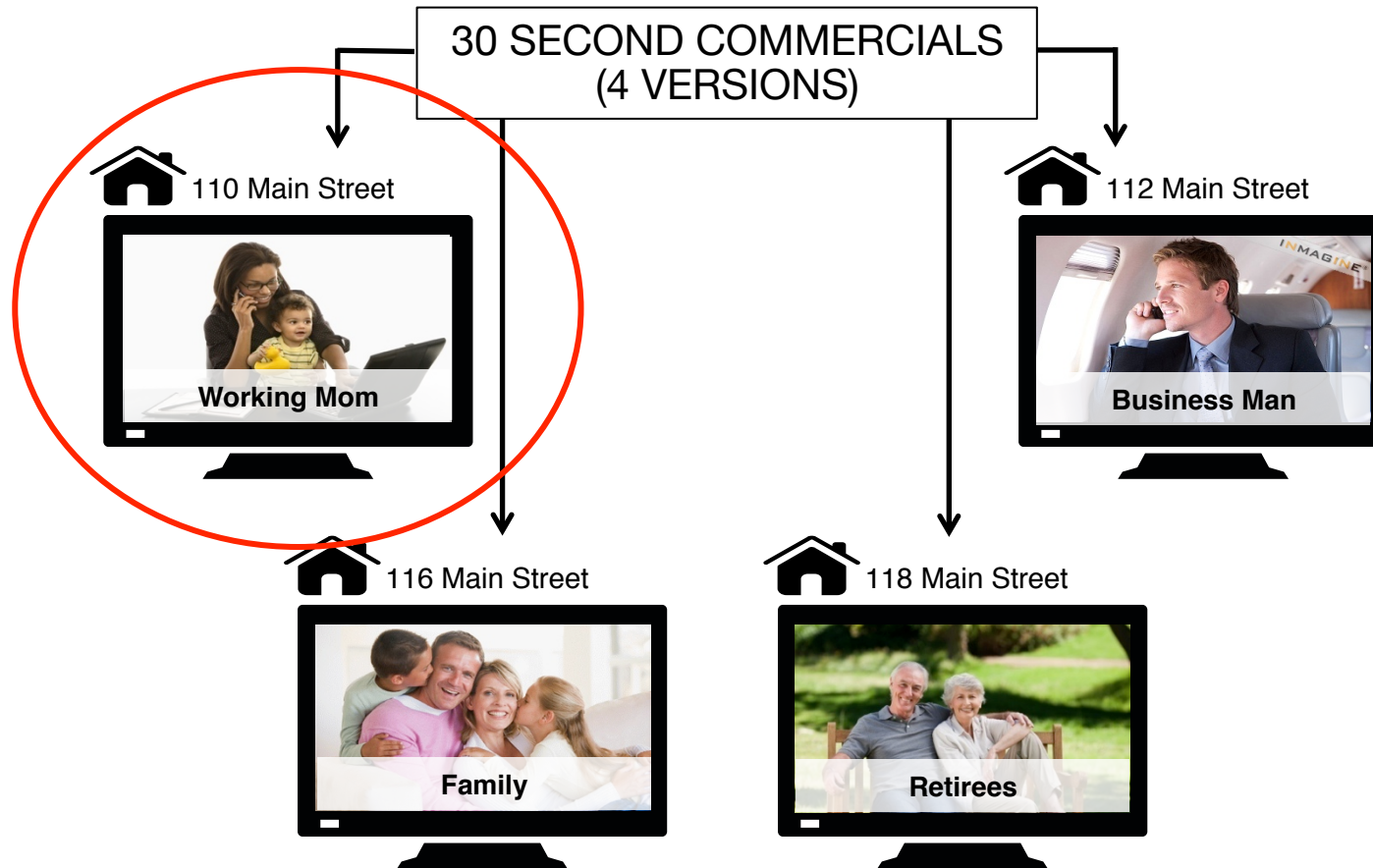
**1 : 1**

# ADDRESSABILITY





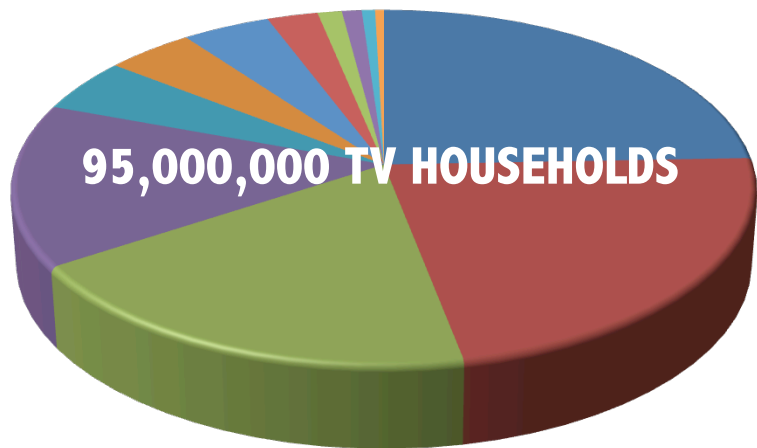
# ADDRESSABILITY



# ADDRESSABLE TV GENERICS

LAUNCH	Mid 2000s
TECHNOLOGY	<div>Invidi<ul style="list-style-type: none"><li>DVR stored</li></ul>Visible World<ul style="list-style-type: none"><li>Origination point</li></ul>FreeWheel<ul style="list-style-type: none"><li>Dynamic ad delivery</li><li>Ad supported VOD</li></ul><del>Cross MediaWorks (formerly BlackArrow)</del><ul style="list-style-type: none"><li><del>Ad supported VOD</del></li></ul></div>
DISTRIBUTION	<div>Multichannel Video Program Distributors (MVPDs)<ul style="list-style-type: none"><li>Cable</li><li>Satellite</li><li>Telco</li></ul></div>
CREATIVE VERSIONING	Multiple versions
INVENTORY	<div>2 minutes<ul style="list-style-type: none"><li>Licensing agreement</li></ul>Cable network inventory<ul style="list-style-type: none"><li>Not broadcast</li></ul></div>
DATA	<div>Privacy protected</div> <div>Behavioral characteristics</div> <div>First party</div>
TARGETING	<div>TV households<ul style="list-style-type: none"><li>Not individuals within households</li></ul>TV set turned on</div>

# MULTICHANNEL VIDEO PROGRAM DISTRIBUTOR UNIVERSE



■ COMCAST (22.4 million)

■ DIRECTV (20.7 million)\*

■ CHARTER/TIME WARNER CABLE/BRIGHT HOUSE (17.3 million)

■ DISH (13.6 million)

■ VERIZON (4.5 million)

■ AT&T (4.0 million)\*

■ COX COMMUNICATIONS (4.0 million)

■ CABLEVISION/ALTICE (2.3 million)\*\*

■ SUDDENLINK/ALTICE (1.1 million)\*\*

■ MEDIACOM (0.9 million)

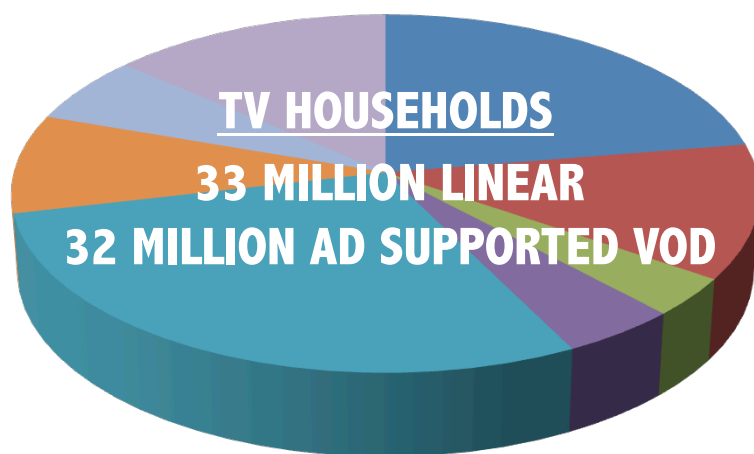
■ WIDEOPEN WEST NETWORKS (0.6 million)

■ CABLE ONE (0.4 million)

\*Merged

\*\*Cablevision/Suddenlink common ownership

# ADDRESSABLE TV UNIVERSE



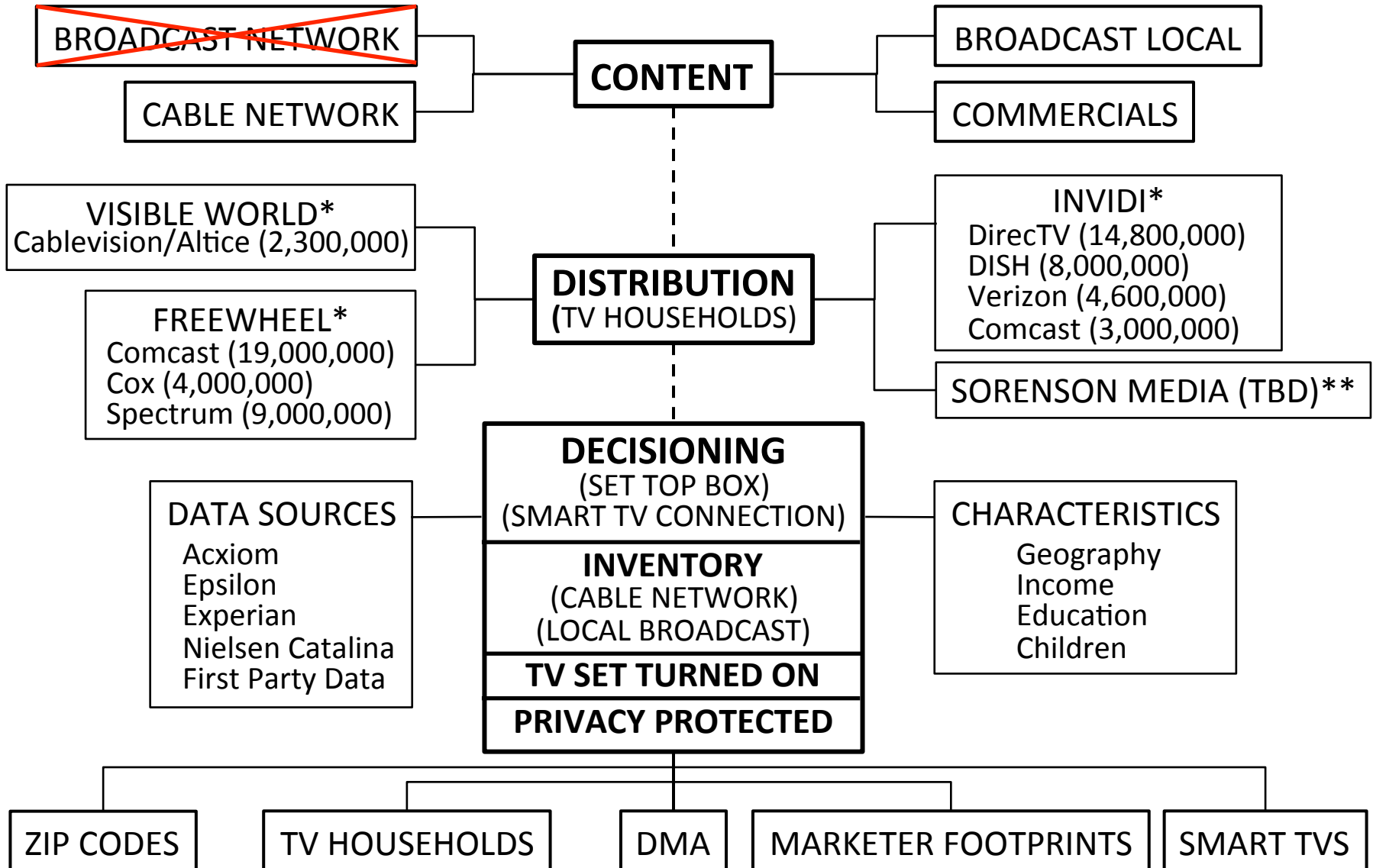
- DIRECTV (14,800,000)
- DISH (8,000,000)
- CABLEVISION/ALTICE (2,300,000)
- COMCAST (3,000,000)
- COMCAST (Ad VOD: 19,000,000)
- VERIZON FIOS (4,600,000)
- COX (Ad VOD: 4,000,000)\*
- CONTINUUM/SORENSEN (TBD)\*
- CADENT ADDRESSABILITY (?)
- SPECTRUM (Ad VOD: 9,000,000)

\*Fourth Quarter 2017 launch (TBD)

# ADDRESSABLE TV NETWORK INVENTORY



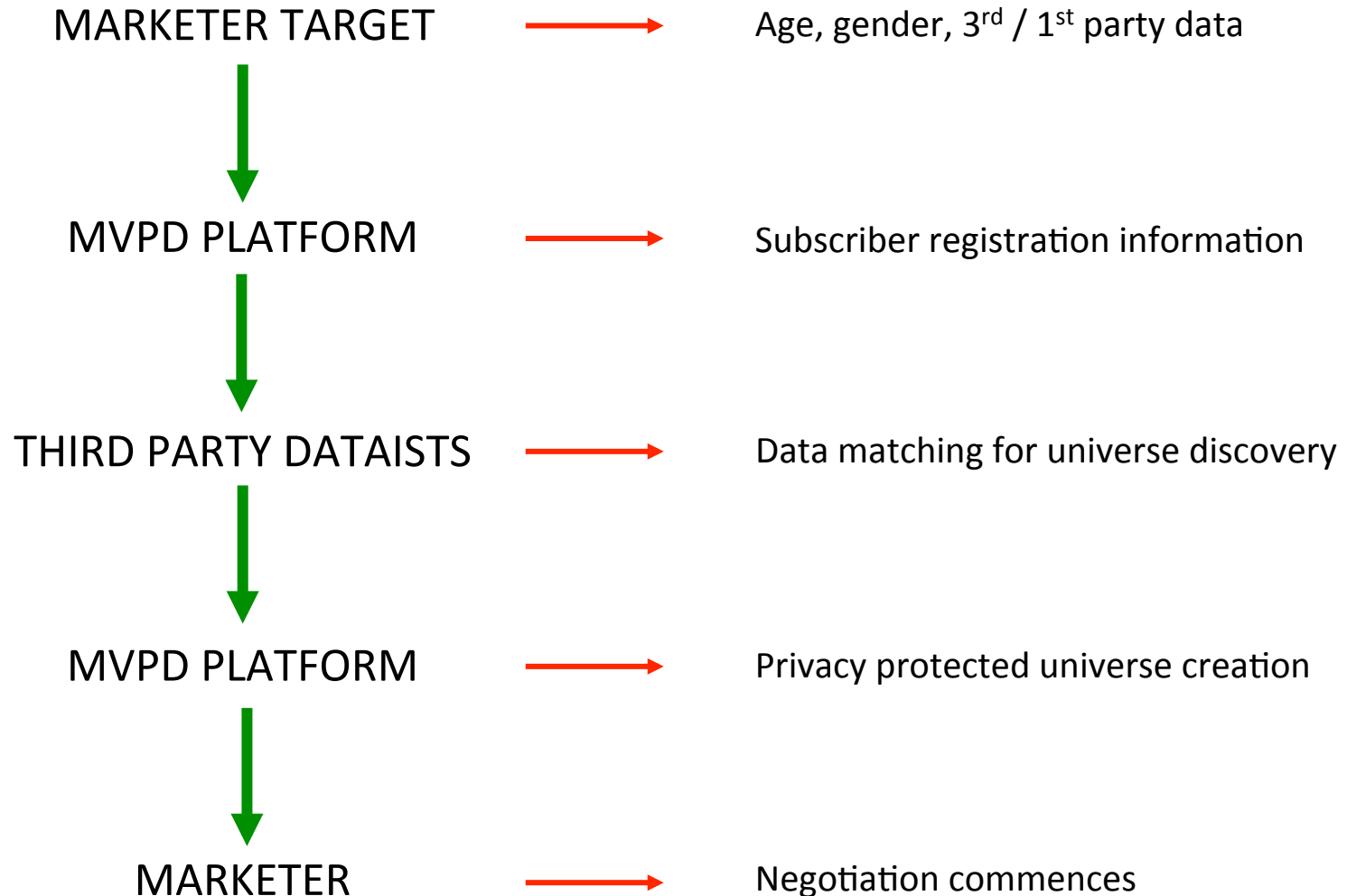
# ADDRESSABLE TV SCHEMATIC



\*MVPD homes

\*\* Local broadcast inventory

# UNIVERSE DISCOVERY PROCESS



# ADDRESSABLE TV: BENEFITS / CHALLENGES

## BENEFITS

More Data to Inform Buy

Brand Criteria Target

- Better targeting

One-to-One

- Household delivered

National (in scope)

- Target aggregated base across footprints

Creative Versioning

Blacklisting Networks

## CHALLENGES

Individual MVPD Negotiations

No Standardized Data Definitions

Premium CPMs

Lacks Household Frequency Capping

One-to-One (household)

- Cannot identify age/gender

Limited Creative Versioning

Schedule Opaque



# **ADDRESSABLE TV ON THE HORIZON**

## **GOOGLE FIBER**

LAUNCH	2016
TECHNOLOGY	Google Fiber to household
MARKET	Kansas City (80,000 subscribers) Salt Lake City (4,000 subscribers)
INVENTORY	Cable network local inventory (MVPD) 2 minutes per hour (traditional availabilities)
VALUE PROPOSITION	Addressability
TARGETING OPTIONS	Individual set top boxes within subscribing household Household clusters Keyword targeting Programs and program genres
COMMENTS	Reconfiguring Google Fiber model

# **ADDRESSABLE TV ON THE HORIZON (cont'd)**

## **SORENSEN MEDIA**

LAUNCH	Late 2015 (TBD)
TECHNOLOGY	Smart TVs ACR software integration TV stations
MARKET	Multiple
INVENTORY	TV broadcast inventory • DMA centric
VALUE PROPOSITION	Addressability
TARGETING OPTIONS	Smart TVs Overlays on video commercials Addressable commercials Interactivity

# **ADDRESSABLE TV ON THE HORIZON (cont'd)**

## **ATSC 3.0\***

LAUNCH	In trial
TECHNOLOGY	Broadcast transmission standards
MARKET	TBD
INVENTORY	TV broadcast inventory
VALUE PROPOSITION	Addressability Multicasting to all mobile devices (mobile) Data-infusion On demand service provisioning Signal augmentation (SD and HD)
TARGETING OPTIONS	TBD

\*Advanced Technology Systems Committee

## **ADDRESSABLE TV ON THE HORIZON (cont'd)**

### **TV NETWORKS**

LAUNCH	TBD
TECHNOLOGY	MVPD Streaming Video Services Smart TV (ACR)
MARKET	Multiple
INVENTORY	Broadcast (network) Cable (network)
VALUE PROPOSITION	Addressability
TARGETING OPTIONS	Multimarket/National
COMMENTS	Licensing arrangement complexity <ul style="list-style-type: none"><li>• retransmission fee diminution (broadcast)</li><li>• monthly per subscriber reduction (cable)</li></ul>

**ON DEMAND**

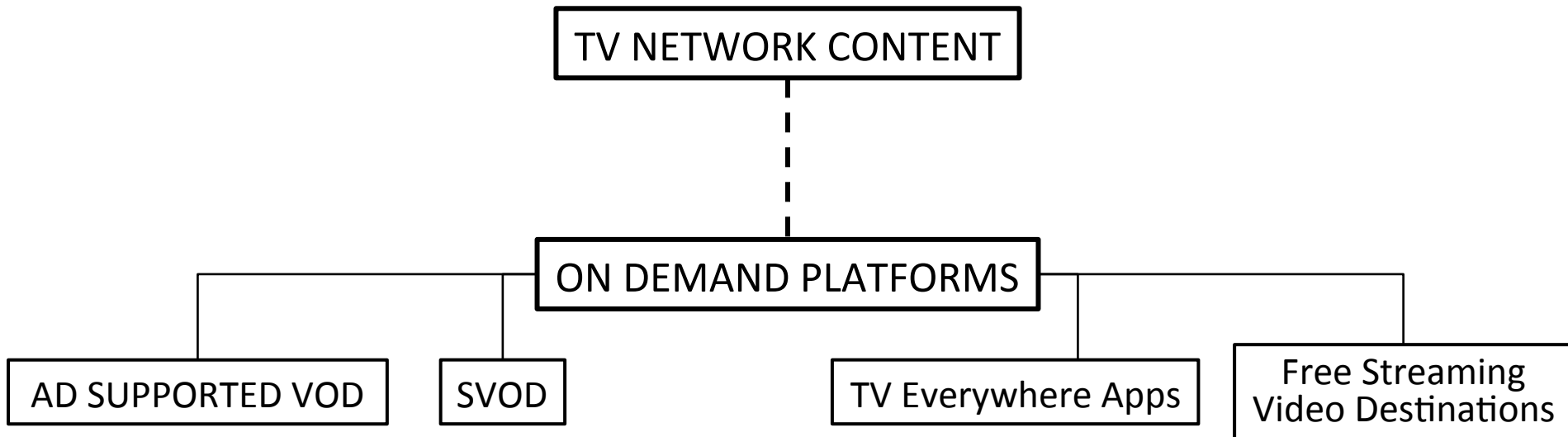


# VIDEO ON DEMAND CONTENT

ANYWHERE  
ANYTIME  
WHEN AVAILABLE



# ON DEMAND TV PLATFORMS

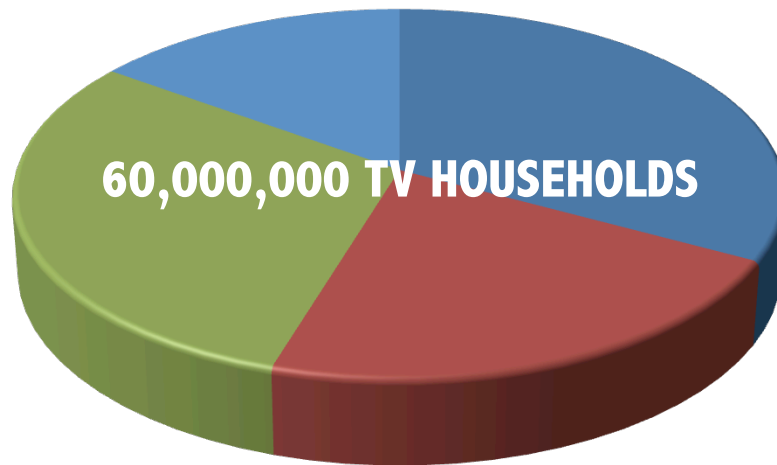


# **AD SUPPORTED VIDEO ON DEMAND GENERICS**

LAUNCH	2002
CONTENT	TV network programming (off-network) <ul style="list-style-type: none"><li>• Broadcast</li><li>• Cable</li></ul>
DISTRIBUTION	MVPDs <ul style="list-style-type: none"><li>• Cable</li><li>• Telco</li></ul>
TECHNOLOGY	Cross MediaWorks (BlackArrow) FreeWheel Canoe Ventures MVPD fast forward disabling
CONTENT AVAILABILITY	Same day (post Hawaiian time) 8 days 4+ recent episodes Past seasons (stacking rights)
COMMERCIAL INVENTORY	Live broadcast mirroring Pre, mid and post rolls Day 4+ On Demand Campaign Ratings (ODCR)
MEASUREMENT	Rentrak (transactions) Nielsen (demographic projection)
INTEGRATION	5+ days 28 days (prior month)



## **AD SUPPORTED VIDEO ON DEMAND UNIVERSE**



CABLE OPERATORS

TELCOS

SATELLITE

# AD SUPPORTED VOD NETWORK INVENTORY



# TOP 25 NETWORK RANKING REPORT (COMSCORE/RENTRAK)

RANK	NETWORK	HOUSEHOLDS VIEWS		AVERAGE TIME PER VIEW
		UNIQUE	GROSS	(MINUTES:SECONDS)
1	Music Choice	3,273,885	67,364,002	04:42
2	Cartoon Network	2,988,204	29,497,672	15:20
3	Nickelodeon	3,329,007	22,708,636	24:04
4	ABC Network	5,026,168	22,263,980	36:43
5	CBS Network	4,820,432	21,651,904	39:30
6	TNT	4,056,411	18,728,820	43:43
7	FX	4,278,985	17,066,741	45:06
8	Nick Jr.	1,942,917	15,501,650	22:67
9	Sprout	1,518,842	13,725,916	21:18
10	Lifetime	3,024,558	13,579,642	40:31
11	NBC Network	3,663,355	13,447,033	41:91
12	USA	2,378,105	13,360,261	41:33
13	MTV	2,628,397	12,929,493	35:13
14	Fox Network	3,350,052	12,099,016	35:29
15	ABC Family	2,026,375	10,103,042	34:56
16	VH1	2,395,793	9,298,568	31:86
17	AdultSwim	1,731,889	9,285,796	19:08
18	Bravo	1,817,787	8,996,300	38:65
19	Comedy Central	1,806,467	7,980,624	20:76
20	A&E	2,333,353	7,965,144	28:98
21	Oxygen	1,513,246	6,856,744	30:09
22	Syfy	1,660,578	6,610,291	43:77
23	TBS	1,759,948	5,699,156	38:85
24	E!	1,689,226	5,341,955	37:04
25	TLC	1,339,741	5,074,653	27:28

## VIDEO ON DEMAND PLATFORMS (OTHERS)

<u>SUBSCRIPTION VIDEO ON DEMAND</u>	<u>TV EVERYWHERE APPS</u>		<u>FREE STREAMING VIDEO DESTINATIONS</u>
	<u>FEATURED</u>	<u>DOWNLOADABLE</u>	
CBS All Access	Amazon Fire	Watch ABC	Crackle
Comcast Stream	Apple TV	Watch ESPN	<del>Hulu</del> /Yahoo View
DirecTV NOW	Chromecast	Watch Fox	YouTube
HBO Go (Now)	Roku	Watch TNT	TV Network (.com)
Hulu	Xbox		
NBC SeeSo			
Netflix			
Verizon Custom			
YouTube Red			
Mid 2000s	Mid 2000s	Mid 2000s	Mid 2000s
Fee	Free	Free	Free
Commercialized Commercial Free	Commercialized Commercial Free	Commercialized -	Commercialized -

# STANDALONE TV STREAMING SERVICES

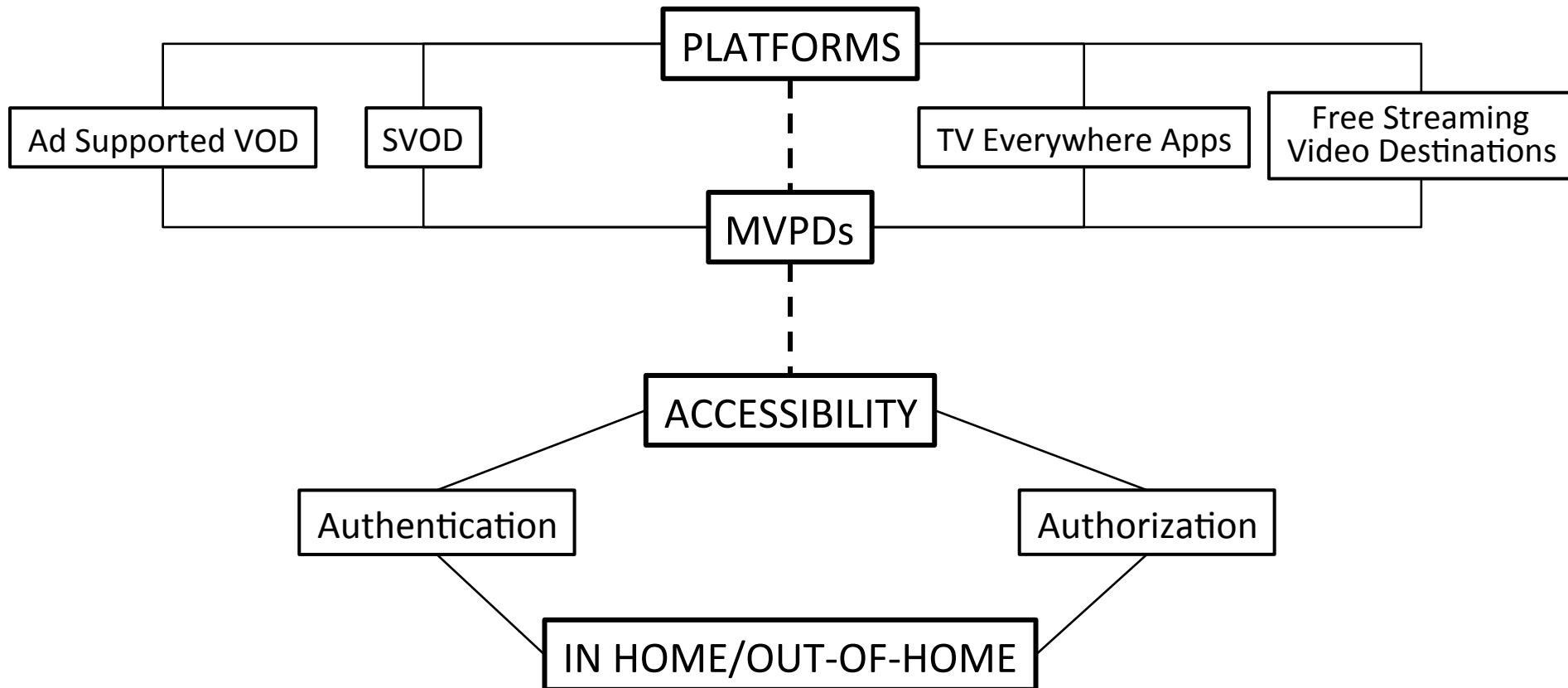
## AD SUPPORTED TV NETWORKS & PREMIUM CHANNELS



## MVPD DERIVED & STREAMING SERVICE PROVIDERS

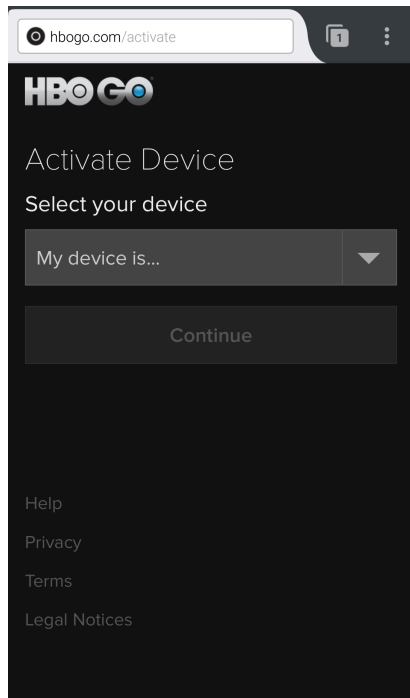


# ON DEMAND TV PROGRAM ACCESSIBILITY



# TV EVERYWHERE 5-STEP PROCESS

## STEP 1



hologo.com/activate

**HBO GO**

Activate Device

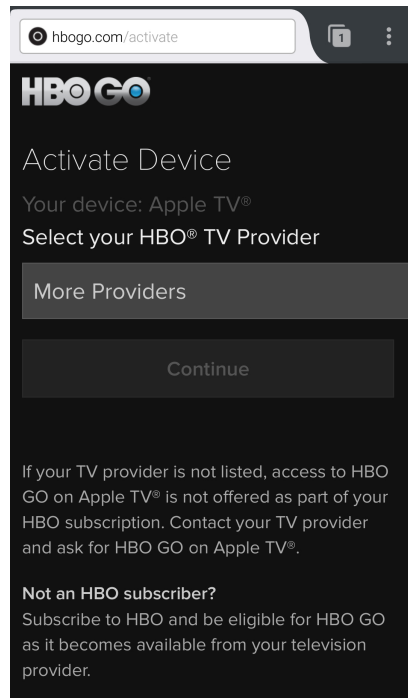
Select your device

My device is... ▼

Continue

Help  
Privacy  
Terms  
Legal Notices

## STEP 2



hologo.com/activate

**HBO GO**

Activate Device

Your device: Apple TV®

Select your HBO® TV Provider

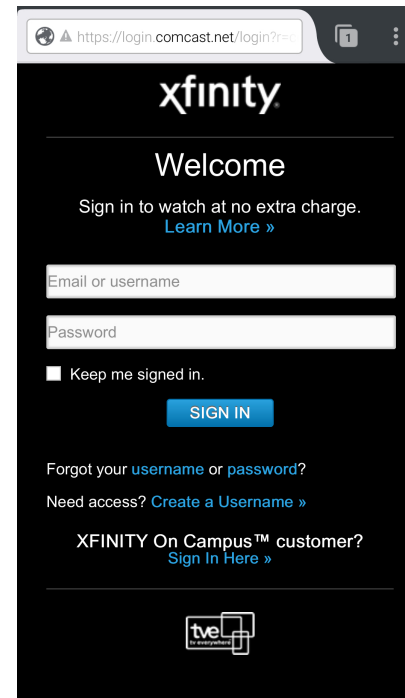
More Providers

Continue

If your TV provider is not listed, access to HBO GO on Apple TV® is not offered as part of your HBO subscription. Contact your TV provider and ask for HBO GO on Apple TV®.

**Not an HBO subscriber?**  
Subscribe to HBO and be eligible for HBO GO as it becomes available from your television provider.

## STEP 3



https://login.comcast.net/login?r=...

**xfinity**

Welcome

Sign in to watch at no extra charge.  
[Learn More »](#)

Email or username

Password

☐ Keep me signed in.

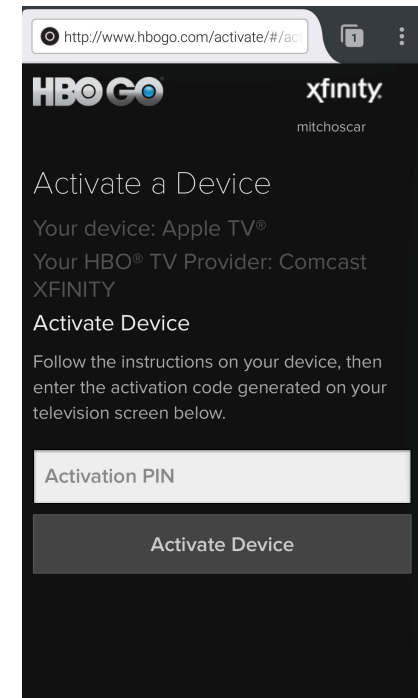
**SIGN IN**

Forgot your [username](#) or [password](#)?  
Need access? [Create a Username »](#)

**XFINITY On Campus™ customer?**  
[Sign In Here »](#)

**tve**  
TV Everywhere

## STEP 4



http://www.hologo.com/activate/#/act

**HBO GO** **xfinity**  
mitchoscar

Activate a Device

Your device: Apple TV®

Your HBO® TV Provider: Comcast XFINITY

Activate Device

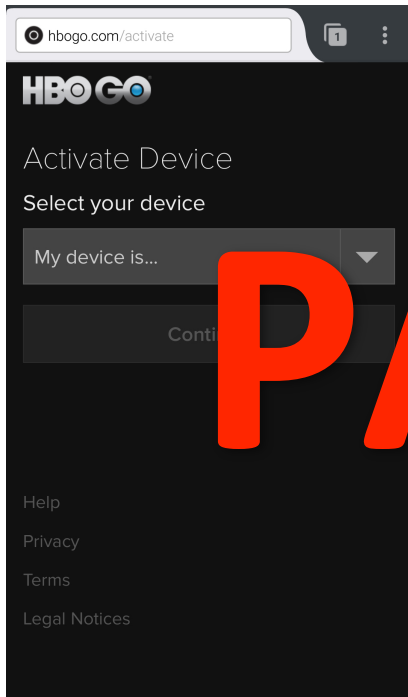
Follow the instructions on your device, then enter the activation code generated on your television screen below.

Activation PIN

**Activate Device**

# TV EVERYWHERE 5-STEP PROCESS

## STEP 1



hologo.com/activate

**HBO GO**

Activate Device

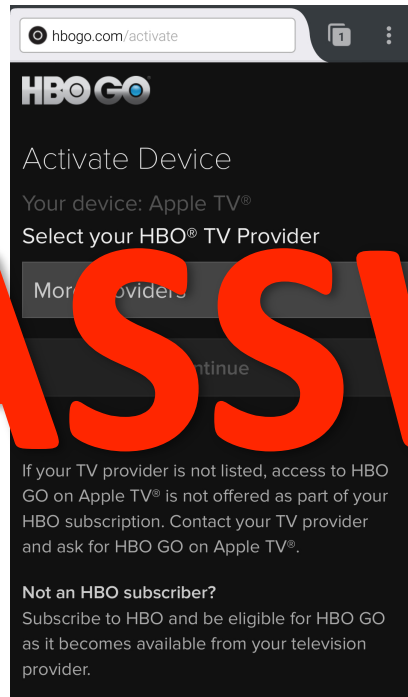
Select your device

My device is... ▼

Continue

Help  
Privacy  
Terms  
Legal Notices

## STEP 2



hologo.com/activate

**HBO GO**

Activate Device

Your device: Apple TV®

Select your HBO® TV Provider

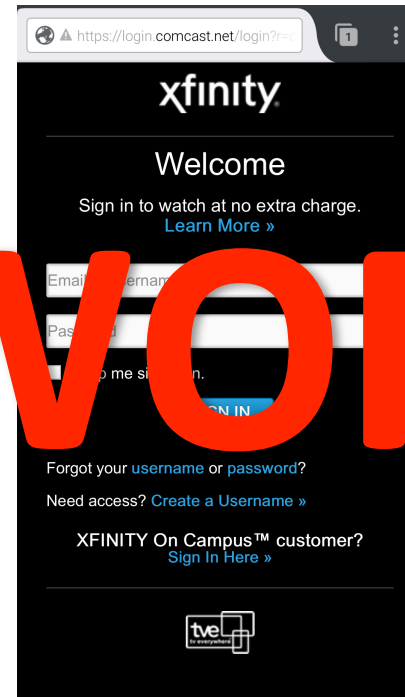
More providers

Continue

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## STEP 3



https://login.comcast.net/login?r=

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Email or username

Password

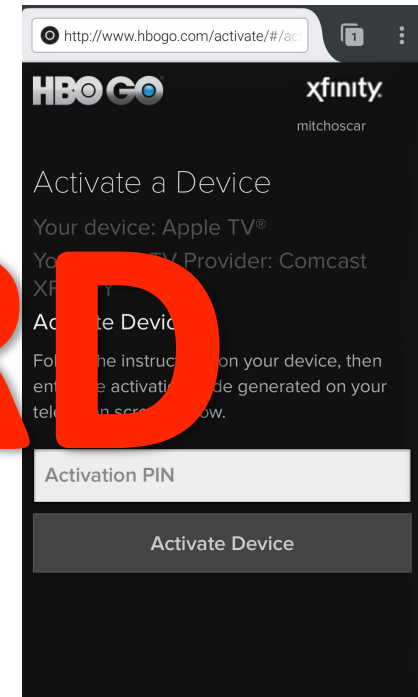
Sign in

Forgot your [username](#) or [password](#)?  
Need access? [Create a Username »](#)

**XFINITY On Campus™ customer?**  
[Sign In Here »](#)

**tve**  
TV Everywhere

## STEP 4



http://www.hologo.com/activate/#/act

**HBO GO**

**xfinity**  
mitchoscar

Activate a Device

Your device: Apple TV®

Your TV Provider: Comcast

Activate Device

Follow the instructions on your device, then enter the activation code generated on your television screen.

Activation PIN

Activate Device

PASSWORD



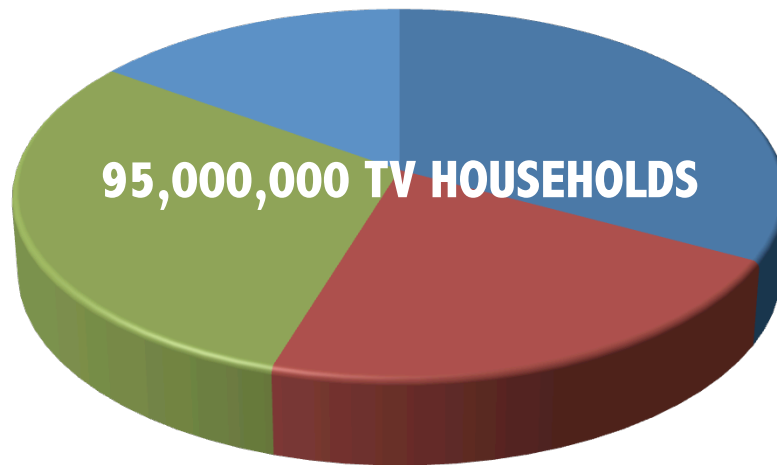
# **PROGRAMMATIC TV**



# **PROGRAMMATIC TV GENERICS**

LAUNCH	2013
PROMISE	Data Automation Cost efficiency
TECHNOLOGY	Proprietary <ul style="list-style-type: none"><li>• Demand side</li><li>• Supply side</li><li>• Trading desks</li></ul>
TARGETABILITY	National <ul style="list-style-type: none"><li>• Higher concentration</li></ul> Local
COMMERCIAL INVENTORY	National TV programs Local TV availabilities Ad supported VOD Syndication
COMMERCIAL LENGTHS	:15s, :30s, pre-mid-post-roll
DEPLOYMENT	95 million TV households
DATA SOURCES	Viewing Behavioral Single source

# PROGRAMMATIC TV UNIVERSE



MVPDs (local)

- Cable
- Satellite
- Telcos

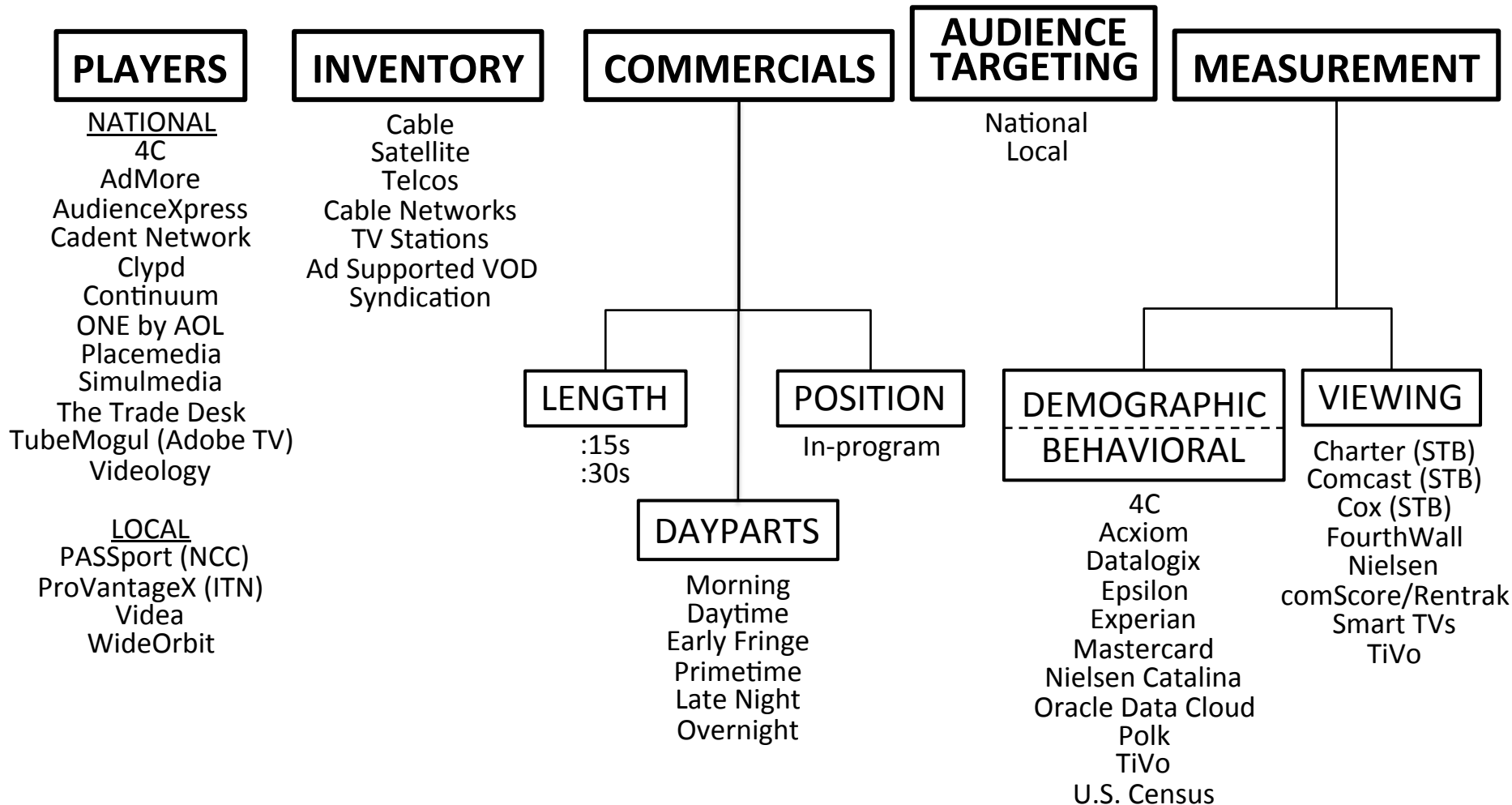
TV Networks (national)

TV Stations (local)

Ad Supported VOD

Syndication

# PROGRAMMATIC TV SCHEMATIC



# **PROGRAMMATIC TV: BENEFITS / CHALLENGES**

## **BENEFITS**

More Data to Inform Buy

Time Efficiency

Better Targeting

Daily Reportage (Varies)

One Order / One Bill

Reach Extension

- Expansion of networks
- Inclusion of 'short snout'
- Affordability of top tier networks

Bridge Video Across Platforms

## **CHALLENGES**

Inventory Schedule Opaque

- Dayparts
- Networks
- Post buy affidavit

Cannot Replicate Campaign

Traditional Buying Compatibility

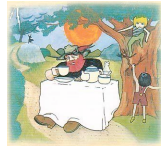
Complex Proposal Valuation

- TV station
- Cable network
- MVPD
- Ad supported VOD
- Syndication



*"It will take longer than we thought to go programmatic."*

# **CONTEXTUAL AUDIENCE NETWORKS**







# CANS INVENTORY

## **TURNER**

Adult Swim  
Boomerang  
Cartoon Network  
CNN  
TBS  
TCM  
TNT  
truTV  
Turner Sports

## **NBCU**

NBC Broadcast Network  
Telemundo TV Networks  
Access Hollywood (syndication)  
NBC Regional Sports Networks  
Bravo  
Chiller  
CNBC  
E!  
Esquire  
Golf  
MSNBC  
NBC News  
NBC Universo  
Oxygen  
SyFy  
USA

## **FOX**

Fox Broadcast Network  
Fox News Channel  
Fox Business Network  
Twentieth Century Syndication  
FS1  
FS2  
FX  
FXX  
FXM  
NatGeo  
Nat Geo Wild

CMT  
Comedy Central  
Logo TV  
MTV  
MTV2  
Nick-at-Nite  
Nickelodeon  
Spike  
TV land  
VH1

## **VIACOM**

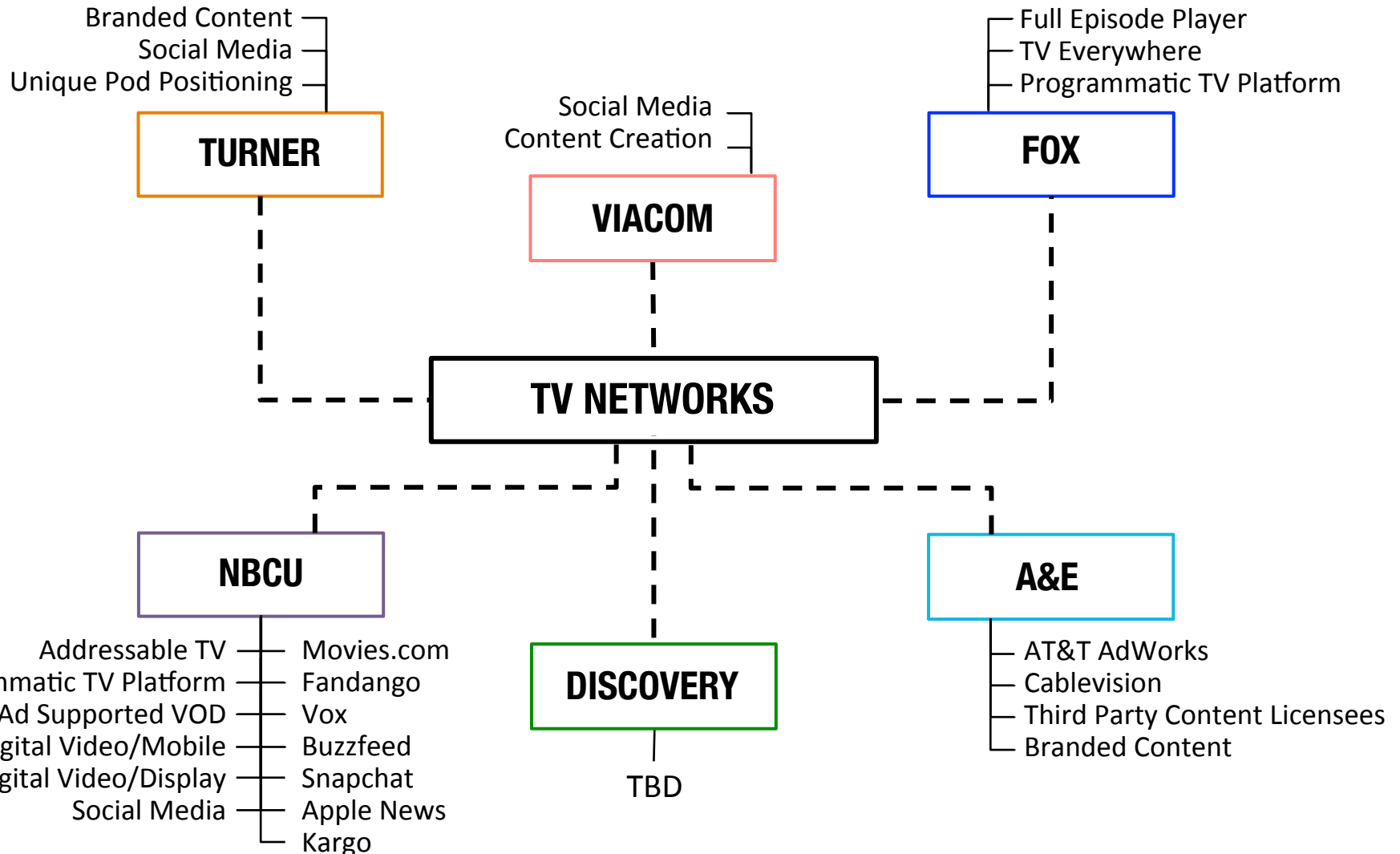
A&E  
FYI  
History  
Lifetime  
Lifetime Movies

## **A&E**

American Heroes  
Animal Planet  
Destination America  
Discovery  
Discovery Family  
Discovery Life  
Investigation Discovery  
OWN  
Science Channel  
TLC  
Velocity

## **DISCOVERY**

# CANS DISTRIBUTION EXTENSIONS



# CANS BY DATA SOURCES

## TURNER

4C  
Acxiom  
Adobe Audience Manager  
BueKai  
comScore/Rentrak  
First Party (CRM)  
KruX  
MRI  
Neustar  
Nielsen Buying Insights  
Nielsen Catalina  
Nielsen MarketBreaks  
Nielsen Mobile Vector  
Nielsen MotorStats  
Nielsen Suite  
Prizm  
Simmons  
TiVo

Experian  
First Party (CRM)  
MRI  
Nielsen AMRLD  
Nielsen Buying Insights  
Nielsen Catalina  
Nielsen Suite  
Set Top Box

## DISCOVERY

## VIACOM

84.51  
Acxiom  
Adobe  
American Express  
BlueKai  
comScore/Rentrak  
GfK  
IHS  
Nielsen  
Nielsen Catalina  
NinthDecimal  
Place IQ  
Proprietary survey-based data  
Resonate  
Simmons/MRI  
YouGov

Exelate  
First Party (CRM)  
MRI Fusion  
Nielsen Buying Insights  
Nielsen Catalina  
Polk  
Shopcom

## FOX

## NBCU

Acxiom Comcast Crossix Datalogix e-Tech Exelate Experian First Party (CRM) FourthWall	IRI Kantar Shopcom Nielsen Polk Proximic Quantcast Set Top Box VisualDNA
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Acxiom  
comScore/Rentrak  
Experian  
First Party (CRM)  
IRI ProScores  
Mastercard  
MRI Fusion  
Nielsen MarketBreaks  
Nielsen Suite  
Polk  
Set Top Box  
Shopcom

## A&E

# CAN PRODUCTS

## A&E PRECISION

Linear Ad Optimizer  
Digital Audience Data Platform  
Sync, Reach, Address Platform  
45<sup>th</sup> & Dean

## TURNER IGNITE

Targeting Now  
Audience Now  
ROI Now  
Provable ROI  
Ignite Sports  
Launchpad  
Native PLUS

## NBCU AUDIENCE STUDIO

Audience Targeting Platform (ATP 2.0)  
NBCU+  
NBCUx Linear  
NBCUx Digital (PMP)  
NBCUx Programmatic Guaranteed  
NBCU Digital Audience Targeting  
Social Sync  
Audience Symphony

Vantage Instant Audience  
Target Discovery  
Velocity Content Network  
Viewpoint  
Echo Social Graph (2.0)  
Vantage Studio Edition  
Vantage Intent: Powered by AmEx

## VIACOM VANTAGE

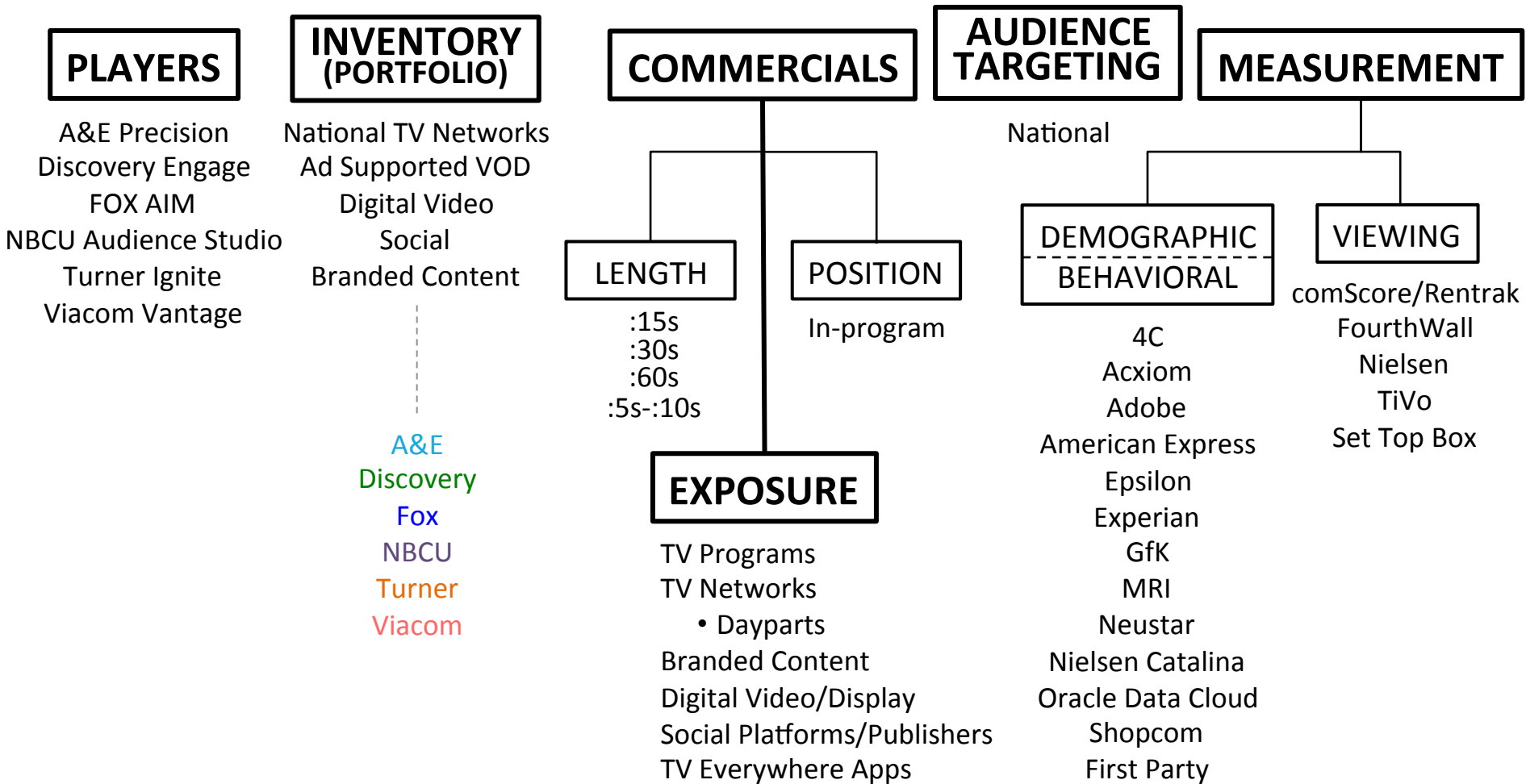
Engage

## DISCOVERY ENGAGE

Optimized Audience Read  
Target Audience Guarantee  
Multi-Platform Guarantee  
Programmatic Audience Buy

## FOX AIM

# CONTEXTUAL AUDIENCE NETWORKS SCHEMATIC



# **CONTEXTUAL AUDIENCE NETWORKS: BENEFITS / CHALLENGES**

## **BENEFITS**

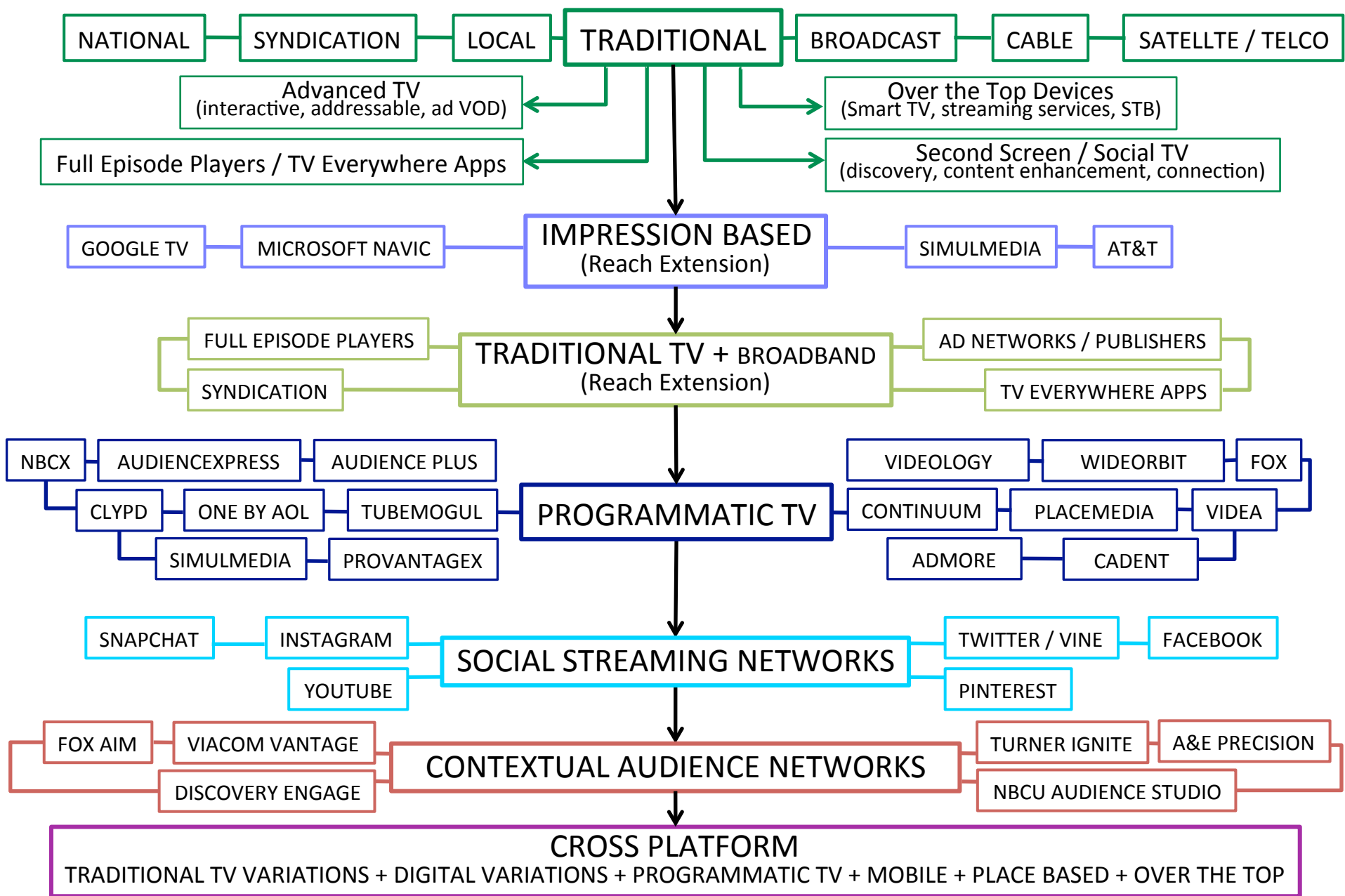
More Data to Inform Buy  
Better Targeting  
Extension of Traditional TV Campaign  
Time Efficiency  
Bridge Video Across Platforms

## **CHALLENGES**

Plethora of Value Propositions  
Complexity of Offering  
Comprehension of Data Sources  
Traditional Buying Compatibility  
Lack of Expertise / Unfamiliarity of Product  
Salespeople  
Advertising agencies  
Data-ists  
Complex Proposal Valuation  
Profusion of components  
Guarantee assessment and analysis  
Inventory across distribution platforms  
Reach & Frequency (walled garden)

# **ADVANCED TV PLATFORMS COMPARISON**

	<b><u>ADDRESSABLE TV</u></b>	<b><u>PROGRAMMATIC TV</u></b>	<b><u>CANs</u></b>
DELIVERY	One to One TV set on	Higher Concentration Panel (indexes)	Higher Concentration Panel (indexes)
DATA INFUSION	Third Party First Party	Third Party First Party (limited)	Third Party First Party
INVENTORY	Platform Universe National Distribution Linear TV Ad Supported VOD - - -	Platform Universe National Distribution Linear TV Ad Supported VOD (limited) Syndication (limited) - -	Portfolio National Distribution Linear TV Ad Supported VOD Syndication (limited) Social Platforms Branded Content

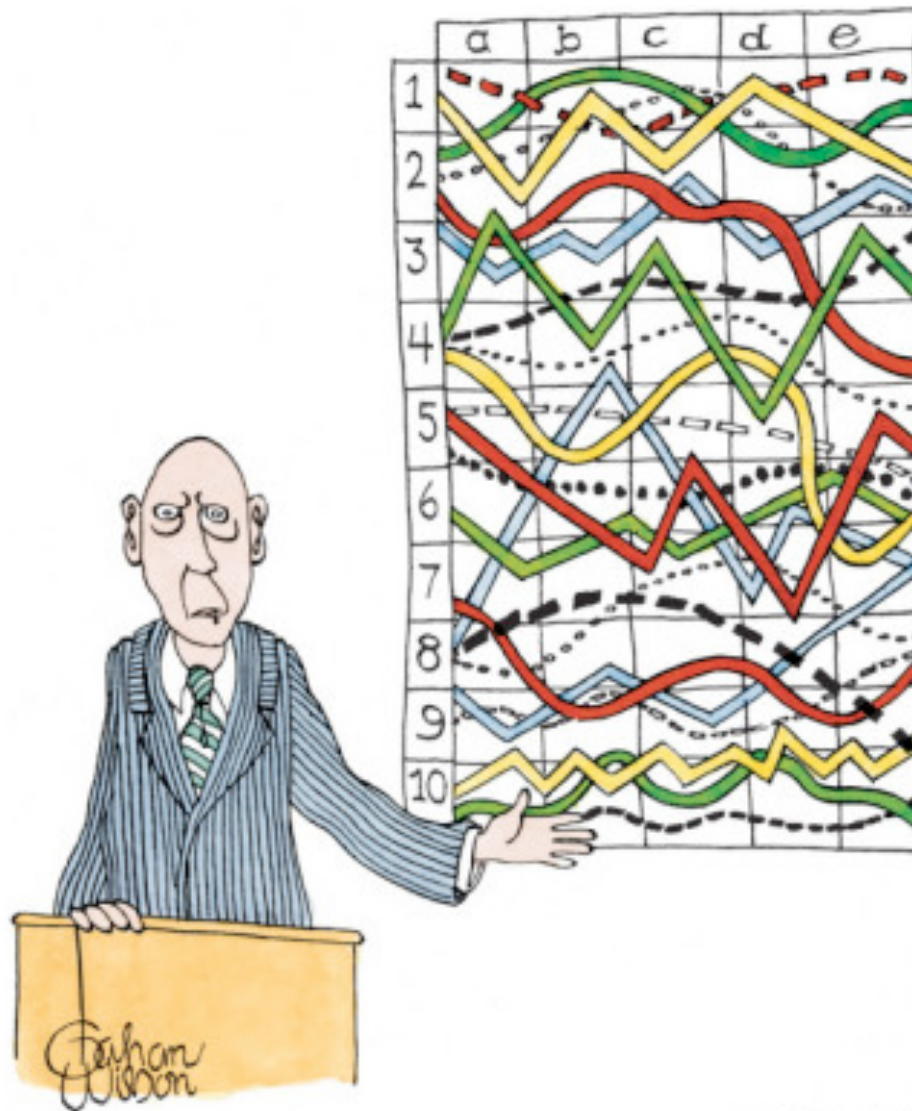


**WORKFLOW**

**DATA**

**AUTOMATION**





“I’ll pause for a moment so you can let this information sink in.”