

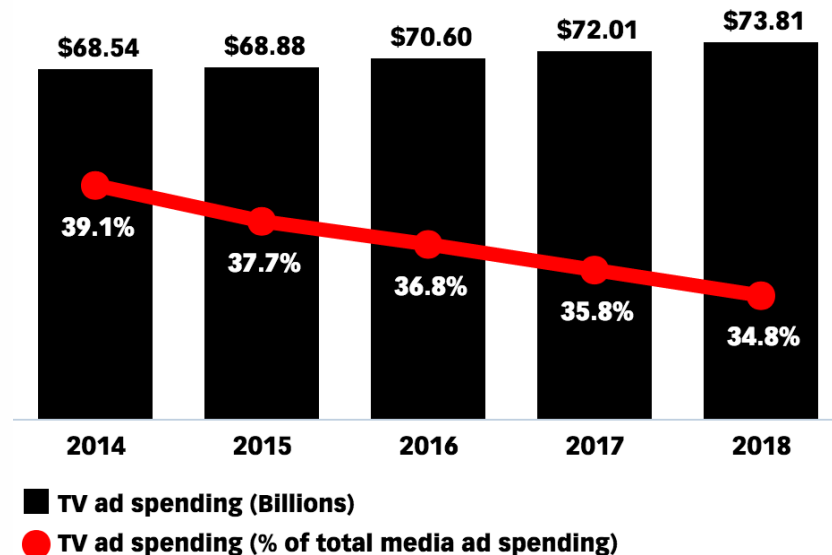
The State of Play in Programmatic TV

@ShearsJames

TV ad spend continues to rise

TV Ad Spending

United States, 2014-2018



Source: eMarketer, 2015



'BROAD CITY'

(Season 2)

YouTube streams:

5,702,613

Facebook streams:

2,860,878

Hulu streams:

8,433,797

Snapchat streams:

1,821,908

Linear:

1,200,000

Fragmentation breaks our usual measures of success.

"I rarely encounter anyone who hasn't heard of 'Broad City' and isn't a fan of it — just anecdotally, it transcends age and gender. If you just looked at the ratings on the day of airing, it would suggest it's not a wildly popular show."

- Kent Alterman, President, Comedy Central

14 Ways to Watch “Walking Dead”?

Google
Play

iTunes

TV
Everywh
e

Netflix

Vudu

AMC.com

AMC
(Pay TV)

Cable
VOD

M-Go

Amazon
Prime

Sony
Playstatio
n Vue

Xbox

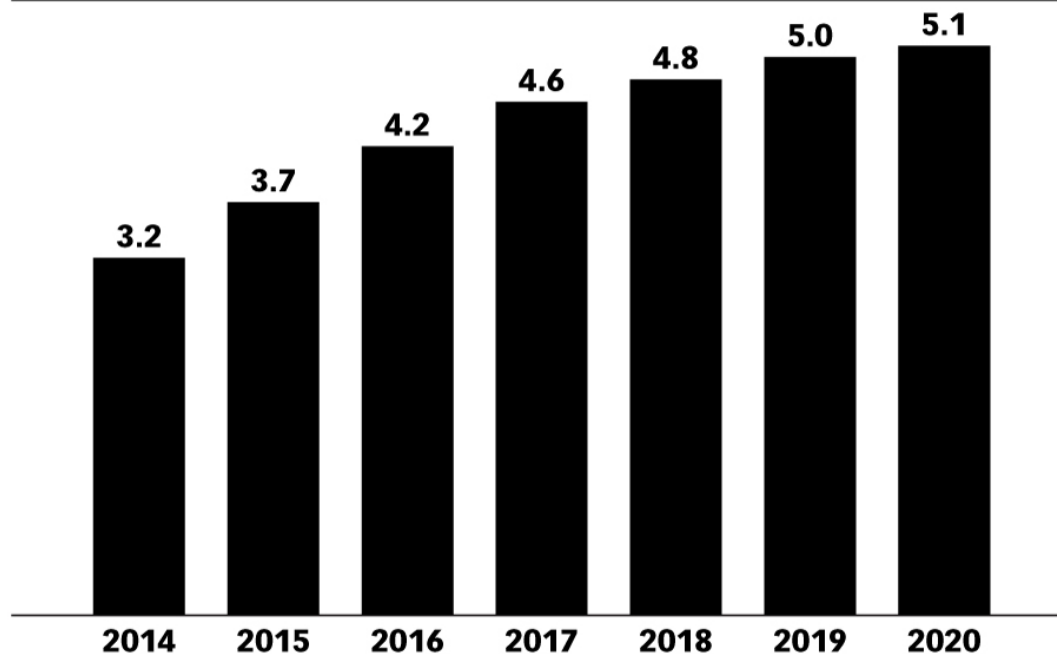
SlingTV

Xfinity
Stream

Will consumers put up with this?

Average Ad Block Length per US Over-the-Top (OTT) TV Episode*, 2014-2020

minutes



**Programmatic solves TV's
fragmentation problem
(and could make ads better too)**

Programmatic TV is nascent

Percent of Programmatic Ad Spending that US Ad Agency Professionals Plan to Allocate to National TV*, Feb 2016

% of respondents

10%-20% 12%

3% 40%-60%

2% 60%+

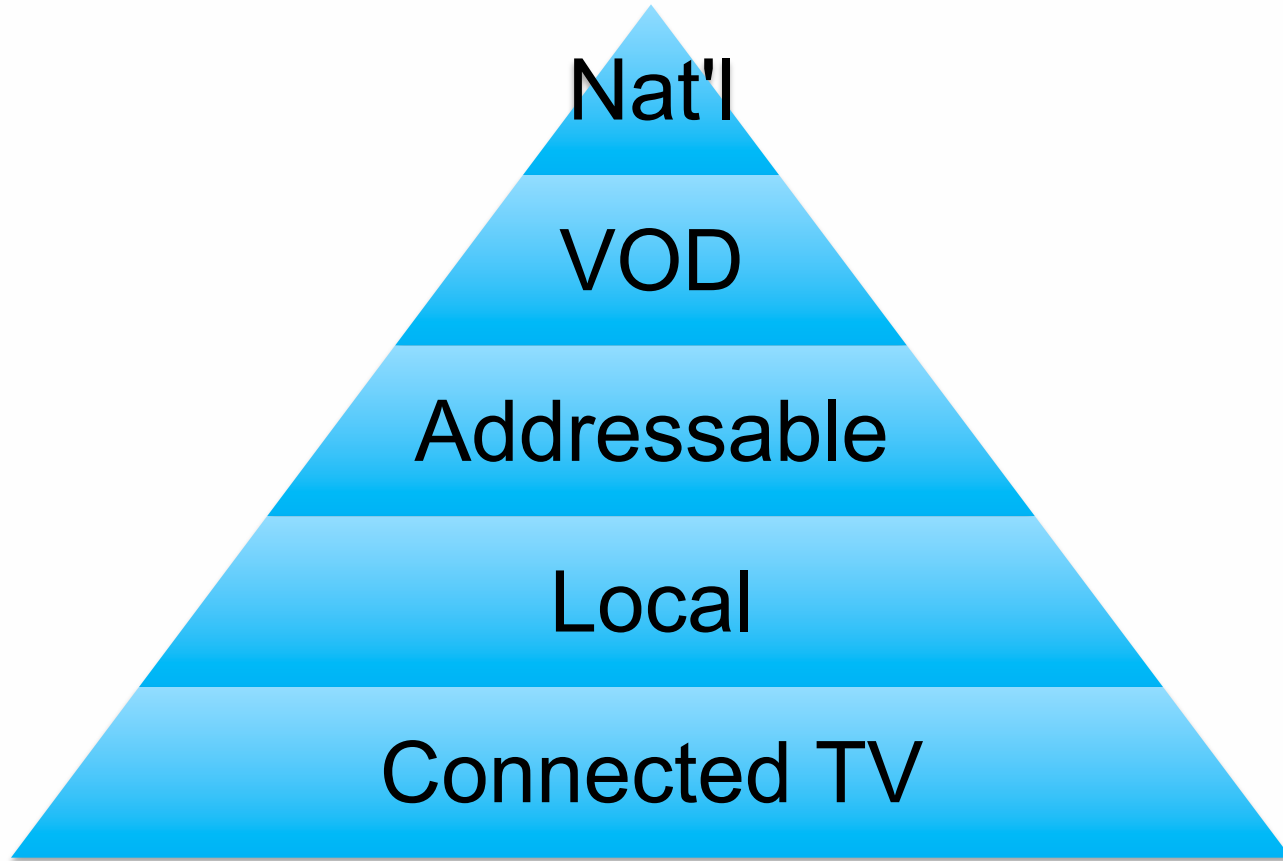
None 83%

*Note: *includes network and cable*

Source: Strata, March 8, 2016

206634

www.eMarketer.com



nielsen

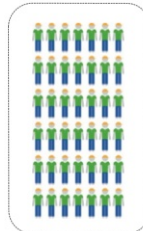
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Scaling through audience lookalike modeling

Algorithmic profiling



- Male
- Age 18-34
- Likes apple products
- Income R30-50k
- Hipster
- Bikes to work
- Early adopter
- Tech enthusiast
- High school educated
- Pop culture obsessed
- Wears glasses



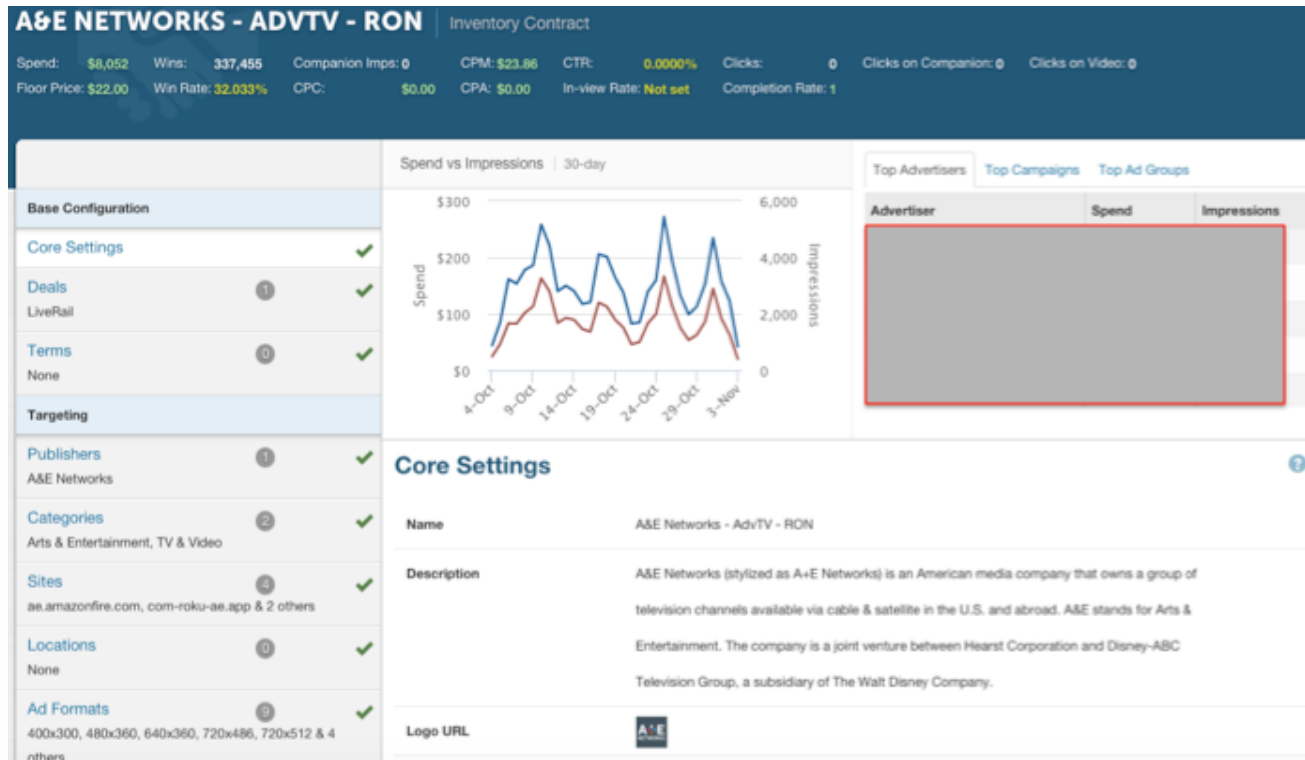
theTradeDesk®

\$2.53

+426%

\$13.30

Programmatic is just another sales channel



Thank You

@ShearsJames