

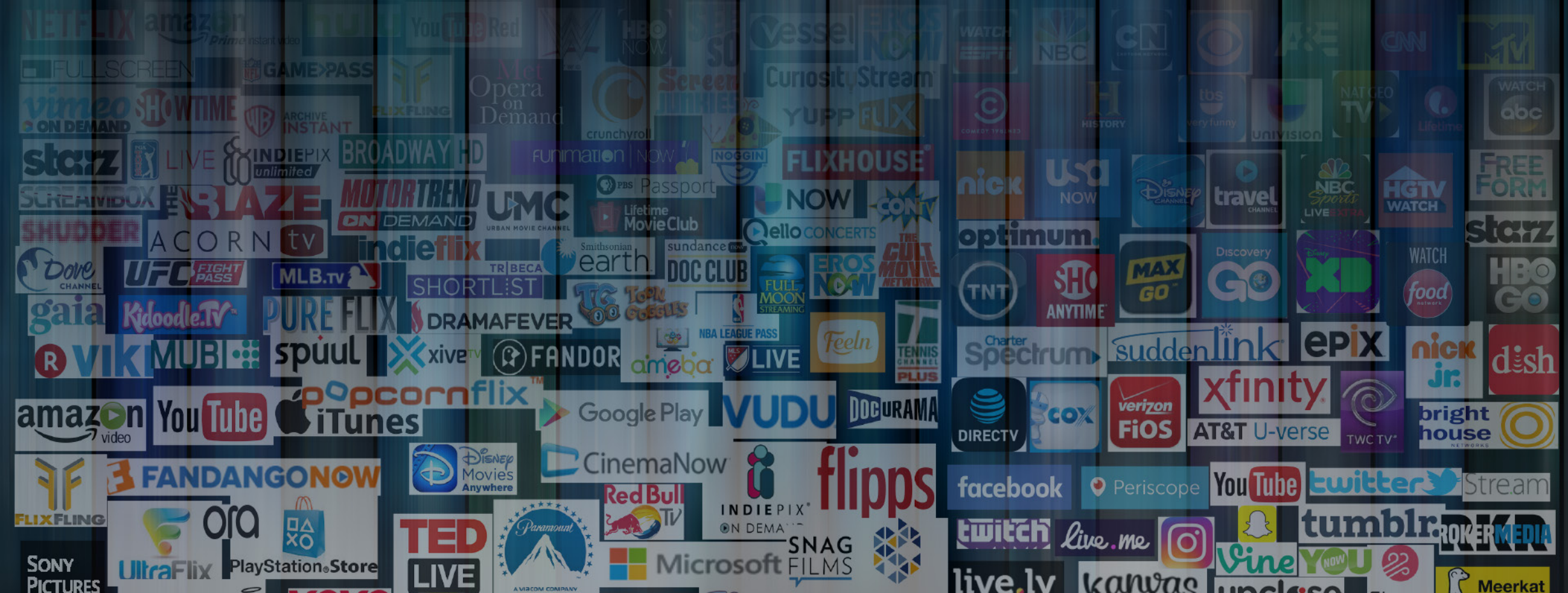


Unrivaled:

How Multi-Screen TV Continues to Dominate in Reach, Relevance, and Results

The Video Landscape Offers Marketers (And Consumers)

More Choices Than Ever





truth

No platform drives business like TV's premium video-at-scale

reach

Offers unparalleled awareness-driving ability

relevance

Engages consumers & provokes real-time conversation

results

Ignites the response that builds brand health & drives business



reach

Offers unparalleled
awareness-driving ability



“

TV is the giant megaphone. When you want to get a message out, that's still really the most powerful means to do it.”

- Isaac Weber, VP of strategy at MarketShare

301,670,000

TV reaches 301,670,000 Americans every month.

96 percent

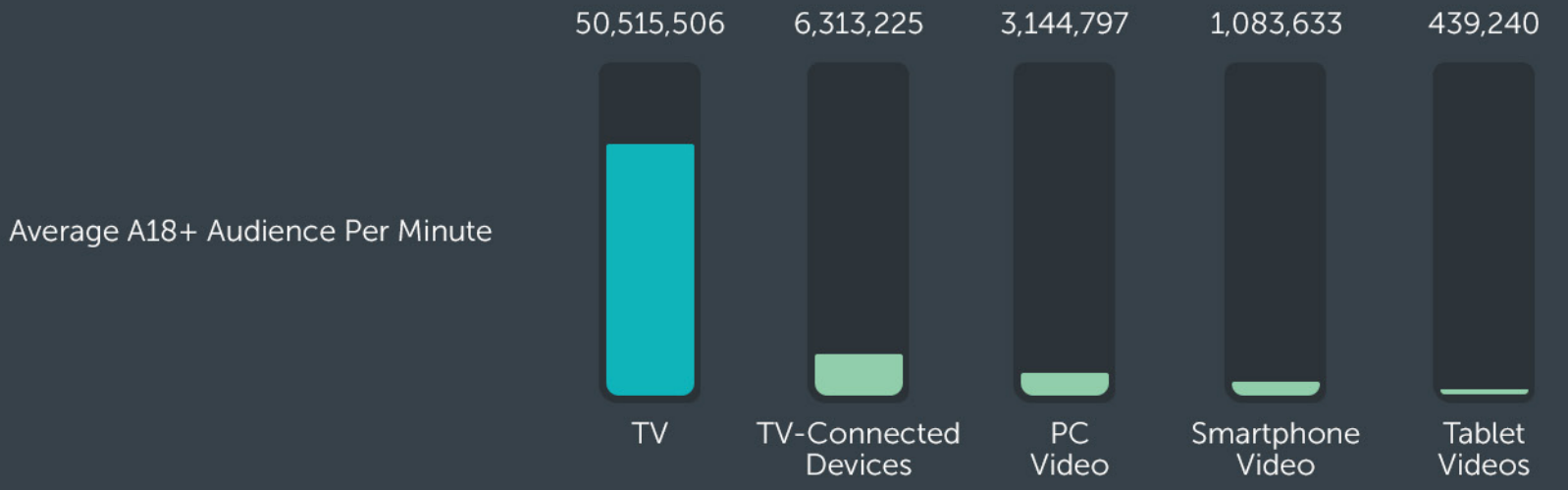
That's 96% of the total US population.

100 million

Nearly 100 Million Households subscribe to Television, a figure that has remained consistent over the last 5+ years.



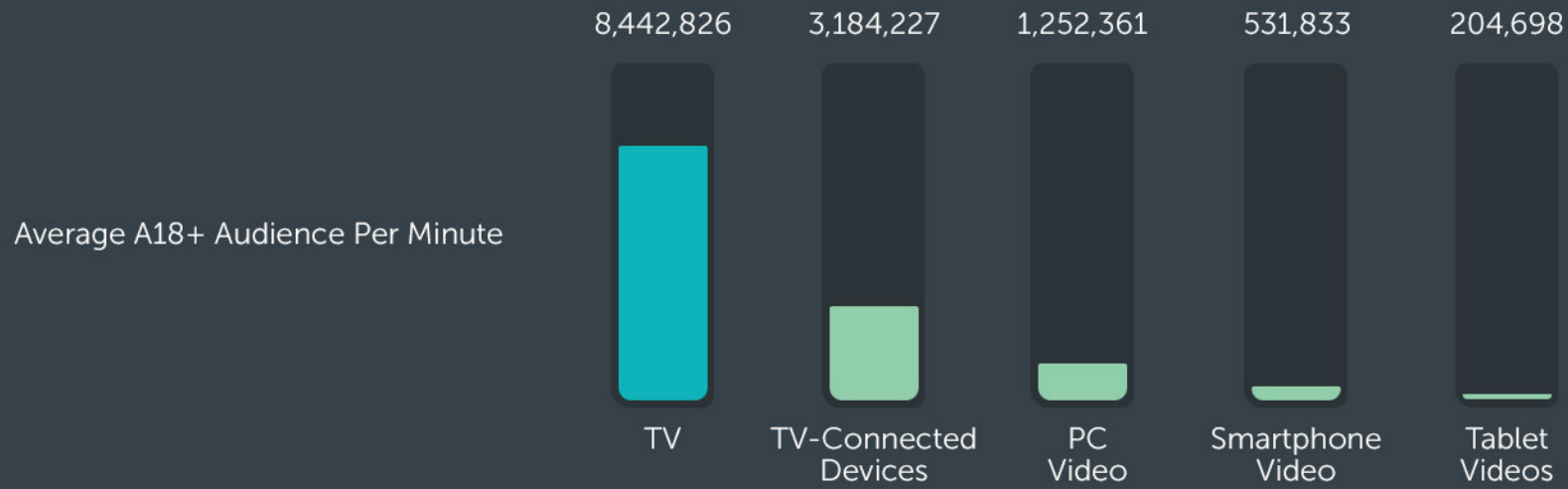
In Any Given Minute,
50 million adults
Are Tuned Into TV



Source: Nielsen Comparable Metrics Report Q4 2016; Data based on average week between September 26, 2016 – December 25, 2016. A18+ UE = 245,740,000.

16x more Millennials

Are Tuning Into Television Over Smartphone Video



Source: Nielsen Comparable Metrics Report Q4 2016; Data based on average week between September 26, 2016 – December 25, 2016. A18-34 UE = 73,460,000.



10x

More People are Watching Ad-Supported TV Content Than Are On Facebook;

13x

More Than YouTube

Source: comScore MediaMetrix Key Measures (multiplatform), May 2017; A18+ Nielsen R&F Time Period Report, Live + SD, Total Day. May 1-31, 2017; A18+. "Average Audience" is based on the average minute, which is factored across the full month for websites and TV. TV Brands include linear TV and TV-related websites. Digital website measurement includes all visitor activity, not just video consumption.



Multi-Screen TV Reaches More Millennials Than YouTube, Facebook, Snapchat and Instagram Combined

4x more Millennials are watching ad-supported TV content than are on Facebook

3x more Millennials are watching ad-supported TV content than are on YouTube

Where Would Top Websites Rank Among Ad-Supported TV Programs?



Based on Adults 18+
Avg. Audience

#176

#279

#948

#1,295

#3,718

Based on Adults 18-34
Avg. Audience

#42

#40

#131

#169

#1,631

Source: comScore MediaMetrix Key Measures (multiplatform), December 2016; Nielsen Npower, Live + SD, Total Day. December 1-31, 2016; "Average Audience" is based on the average minute, which is factored across the full month for websites and across program run time for TV. Digital website measurement includes all visitor activity, not just video consumption.

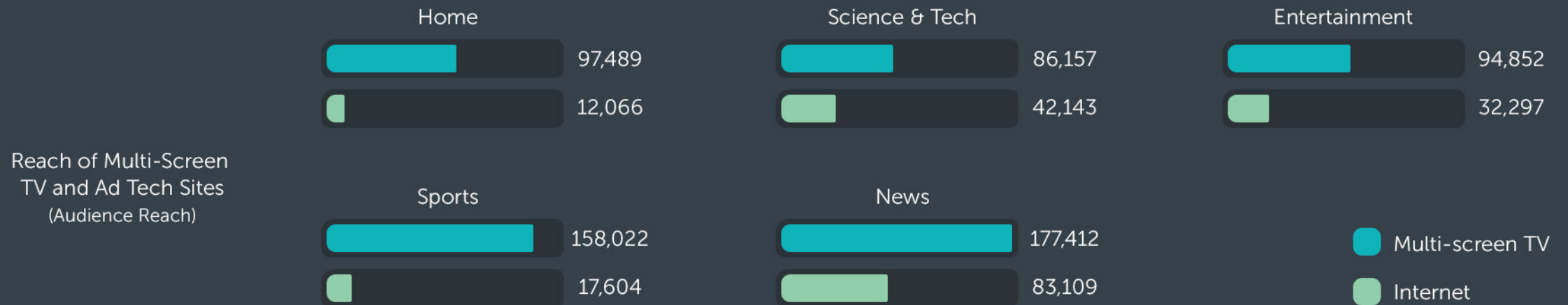
A group of four people (three men and one woman) are gathered around a tablet, looking at the screen with expressions of surprise and excitement. The man on the left has a wide-eyed, open-mouthed expression. The woman in the center is smiling broadly, showing her teeth. The man on the right is also smiling widely. The woman on the far right is partially visible, looking towards the tablet. The background is a soft-focus indoor setting. There are decorative geometric shapes: a large light blue triangle on the left and a large orange triangle at the bottom center.

While Multi-Screen TV Offers Exceptional Reach,
It Can Also Deliver Niche Audiences

Across A Variety Of Enthusiast Targets,
Multi-Screen TV Brands Offer

2x+ Greater Reach

Than The Top Ad Tech Site In The Genre



Sources: Nielsen Npower Live+7, Total Day, P2+, 4/1/17-4/30/17, TV - Linear with VOD; comScore April 2017 Total Unique Visitors; Ad Tech sites are the highest reaching in their category, after any TV brand sites



Through Addressable TV, Advertisers Can Precisely Target Their Most Lucrative Consumers

Precision Beyond Demographics

Customized Creative / Tracking

Minimized Waste

ROI Measurement & Testing



Relevance

Engages Consumers &
Provokes Real-Time
Conversation



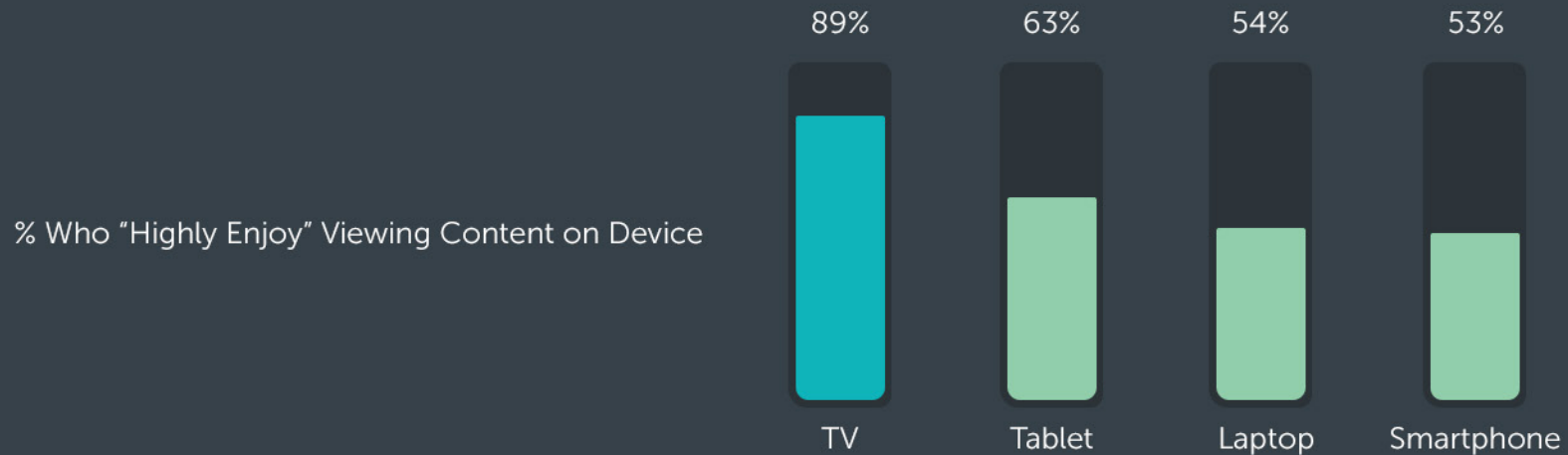
“

Viewers actively look forward to watching TV platforms and say they are more personally invested, immersing themselves in content that engages and excites them.”

- IPSOS/Discovery Video Perceptions study

Consumers Prefer Watching Content on Television

"Enjoyment" is a measure of program engagement

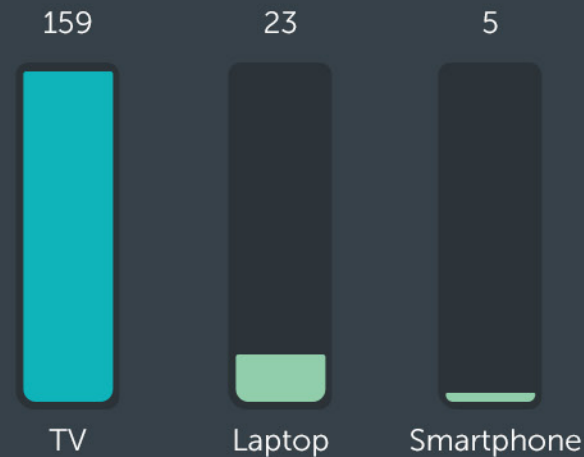


Source: CRE and Hub Research custom study "New study finds that TV outperforms Digital platforms in viewer ad attention & recall" 6/26/16

Adults Spend **7x** More Time Watching TV Than Video on a PC

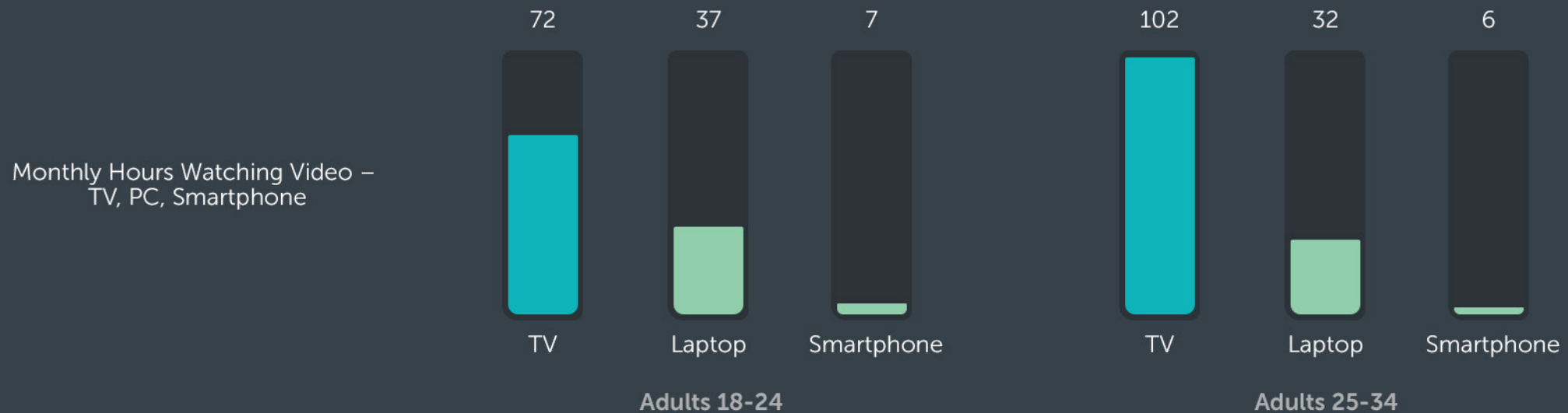
Put in perspective, Adults spend one-third of their waking hours watching TV

Monthly Hours Watching Video on TV, PC, Smartphone (P2+)



Source: Nielsen Total Audience Report, Q1 '17; TV = Live TV + DVR + Time Shifted

Younger Millennials Spend **2x** and **10x** More Time With TV Than With Video On A PC Or Smartphone, Respectively



Source: Nielsen Total Audience Report, Q1 '17; TV = Live TV + DVR + Time Shifted



Even The Most “Unlikely” TV Viewers View More TV than Streaming Video

THE HEAVIEST STREAMERS

are watching **8x** more TV a day than streaming video on a PC

THE LIGHTEST TV VIEWERS

are watching **15x** more TV a day than streaming video on a PC

Why?

Because TV is in the Business of Creating Iconic Hits

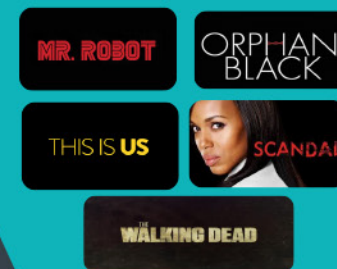
Sports



Awards & Specials



Drama



Reality



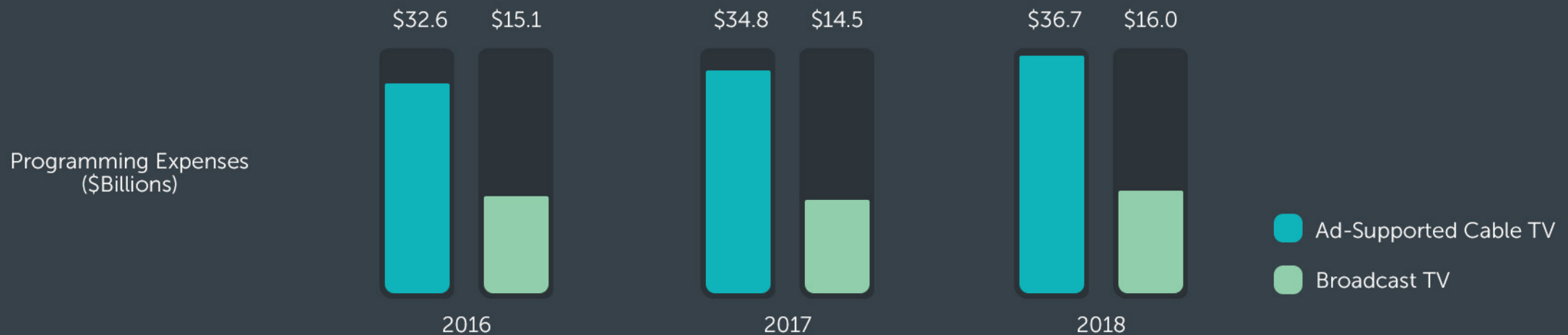
Comedy



News



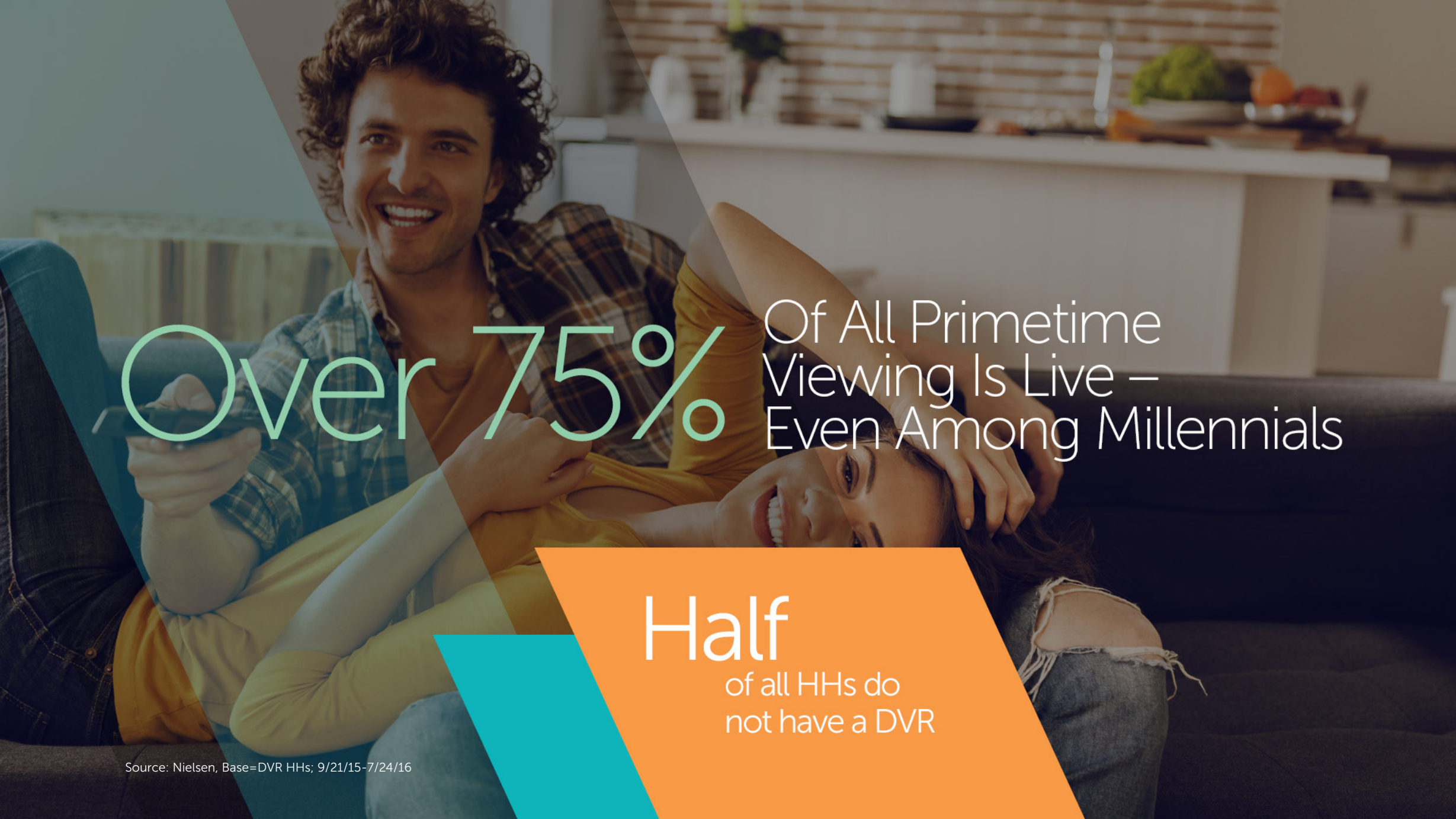
And TV Brands Invest Heavily in This Premium, Long Form Video Content



Source: SNL Kagan 2016



TV Brands Behave as Cultural
Touchstones, With The Unrivaled
Power To Create Community And
Drive Real-Time Conversation



Over 75%

Of All Primetime
Viewing Is Live –
Even Among Millennials

Half

of all HHs do
not have a DVR



79% of the Top-Trending Primetime
Twitter topics were about TV

Demonstrates TV's appeal
to millennial viewers –

58% of all time
spent on Twitter is by
18-34 year olds

Underscores that the
majority of TV is
viewed live –


77% of
primetime is watched
in real-time



90%

of the trending entertainment topics were about ad-supported TV

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:15p, 9:15p, 10:15p, 11:15p) during 4-week time period (10/10-2016 – 11/6/2016). Based on unique program counts.



88%

of nationally televised NFL, MLB, NBA and evening college football games across the major TV networks trended in the top 10 during primetime on their respective nights

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:15p, 9:15p, 10:15p, 11:15p) during 4-week time period (10/10-2016 – 11/6/2016). Results include both “direct” and “related” TV topics. NFL: Sunday Night Football on NBC – 10/16, 10/23, 10/30, 11/6; ESPN Monday Night Football – 10/10, 10/17, 10/24, 10/31; Thursday Night Football – 10/13, 10/20, 10/27, 11/3. NCAA Football: ESPN Friday Night Football – 10/14, 10/21, 10/28, 11/4; ABC Saturday Night Football – 10/15, 10/22, 10/29, 11/5; ESPN 10/15, 10/22, 10/29, 11/5. NBA: ESPN – 10/26, 10/28, 11/2, 11/4; TNT – 10/25, 10/27, 11/3. MLB: MLB Network – 10/10; TBS – 10/10, 10/14, 10/15, 10/17, 10/18, 10/19; FS1 – 10/10, 10/11, 10/13, 10/15, 10/16, 10/18, 10/19, 10/20, 10/22; FOX – 10/25, 10/26, 10/28, 10/29, 10/30, 11/1, 11/2

It's No Surprise That The Passion Consumers Have For TV Brands Extends To Their Presence Online

Top 5 Rank by Internet Genre – P2+ Total Minutes Viewed

Sports

ESPN
NBC Sports
MLB
Bleacher Report
CBS Sports

Comedy

Resignation
Media
9GAG
Comedy Central
Tickld
Funny Or Die

TV Entertainment - Black

CBS
NBCU
ABC
VH!
A&E

General News

ABC News
CNNNews
FOXNews
NBCNews
CBS News

Finance News

Yahoo Finance
MSN Money
Dow Jones
CNBC
CNN Money

Home

HGTV
Hearst
HomeTalk
Houzz
CafeMedia Home

Weather

WeatherBug
The Weather Channel
AccuWeather
Yahoo Weather
MSN Weather

TV Entertainment

ABC
NBCU
CBS
GSN
MSN TV

Food

Food Network
AllRecipes
MSN Food & Drink
CafeMedia Food
Time Inc Food

Kids

Roblox
Disney Entertainment
PBS Kids
Totally Kidz
Playwire Media

Millennials Love TV Brands Online

Top 5 Rank by Internet Genre – A18-34 Total Minutes Viewed

Sports

ESPN
NBC Sports
MLB
Bleacher Report
Fox Sports

Comedy

Resignation
Media
9GAG
Comedy Central
Elecutus
Cracked

TV Entertainment - Black

NBCU
ABC
VH1
CBS
CW

General News

CNN
Buzzfeed
FOXNews
NBCNews
CBS News

LGBTQ

Adam4Adam
Logo
Here Media
Queerty
Pink News

Home

Hearst
HGTV
HomeTalk
Houzz
CafeMedia Home

Weather

WeatherBug
The Weather Channel
AccuWeather
Yahoo Weather
MSN Weather

TV Entertainment

ABC
NBCU
CBS
CW
Turner

Food

Food Network
AllRecipes
CafeMedia Food
Time Inc. Food
Bon Appetit

Kids

Roblox
Disney Entertainment
PBS Kids
Totally Kidz
Playwire



Results

Ignites the response that
builds brand health &
drives business



“

Someone who is highly attached is three times more likely to engage with the brand. They are less price sensitive, go deeper into the product line and have a higher lifetime value to an advertiser.”

- Gary Reisman, CEO and Founder, LEAP Media Investments

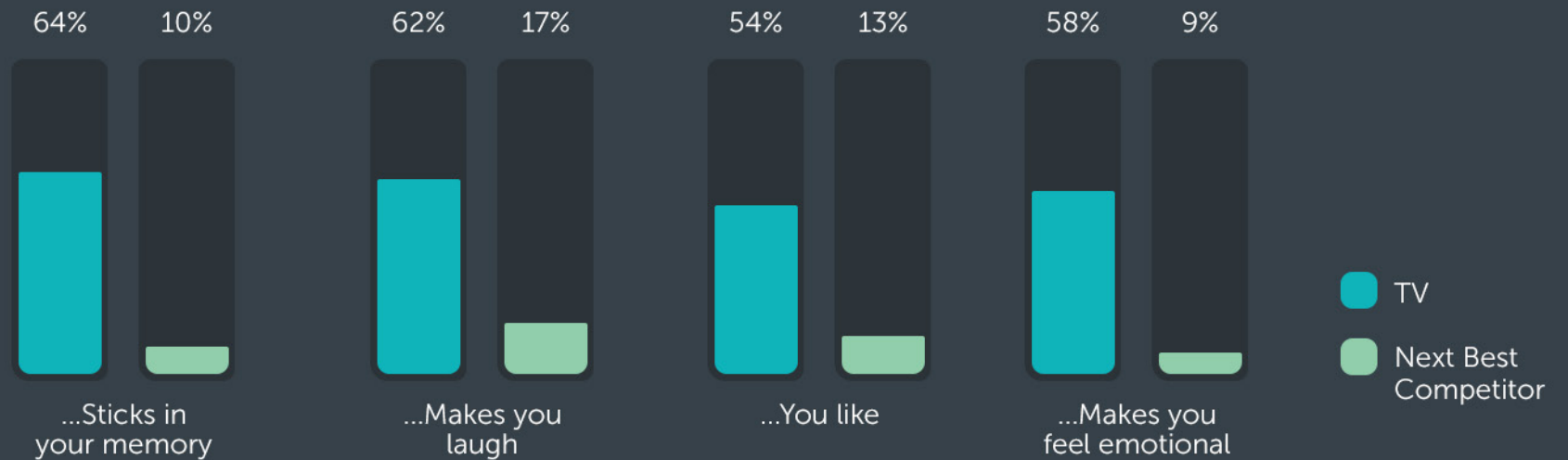
“

TV offers the best ROI across all media.”

-Marcos de Quinto, Global CMO, The Coca Cola Company

TV Advertising Is More Emotionally Compelling

"In which places are you most likely to find advertising that..."
(% agree)





Higher Emotional Connection Delivers Stronger TV Ad Recall and Attention

62%

of viewers able to identify half or more advertisers after viewing content

29%

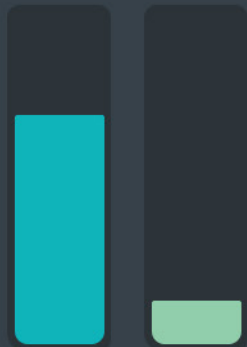
% of viewers who reported full or nearly-full attention

TV Advertising Heightens Brand Awareness

"In which places are you most likely to find advertising that..."

66%

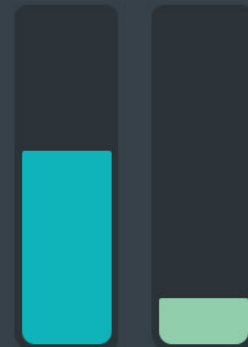
12%



...Makes brands famous

55%

13%



...Draws your attention to brands/products

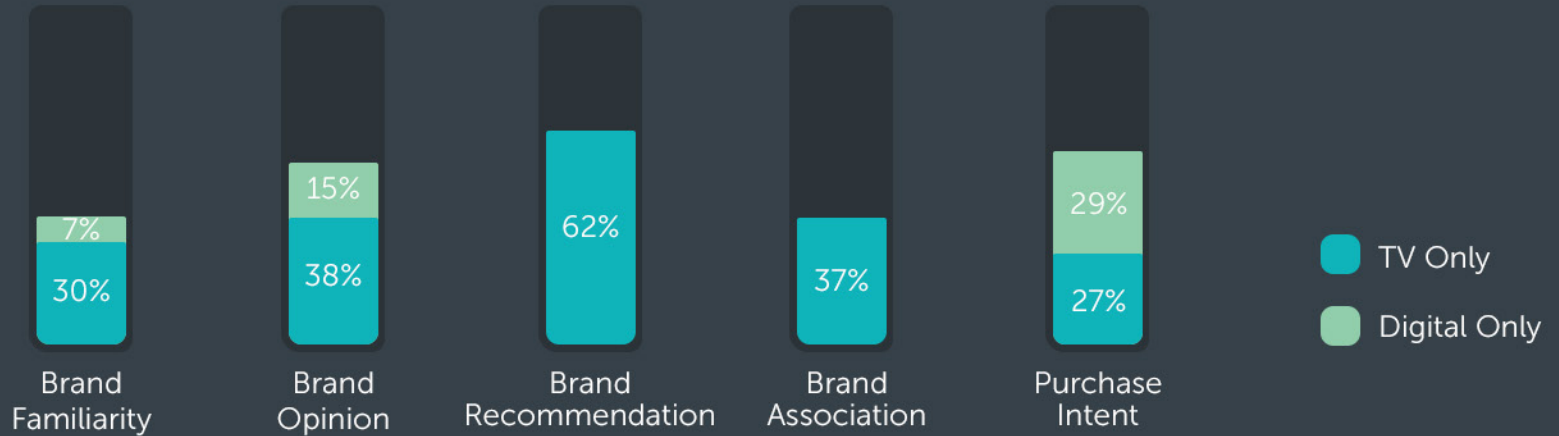
TV

Next best competitor/
Social media



As A Result, TV Advertising Is More Impactful

% Lift Driven by
TV Only & Digital Only



Source: IAB/Research Now Cross Media Effectiveness Study, January 2017; Digital Only = Desktop + Mobile Web

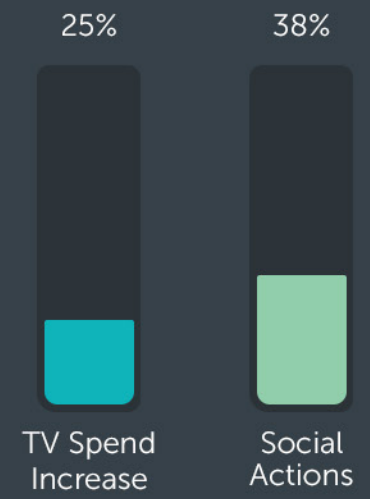


The “Best Perceived” Brands Are Big TV Advertisers

The 2016 “best perceived”
brands increased their
total TV spend by
+25% vs. '15

A Presence In TV Stirs Consumers To Action

2016 Best Perceived Brands
Increase in TV Spend and Increase in Social Actions

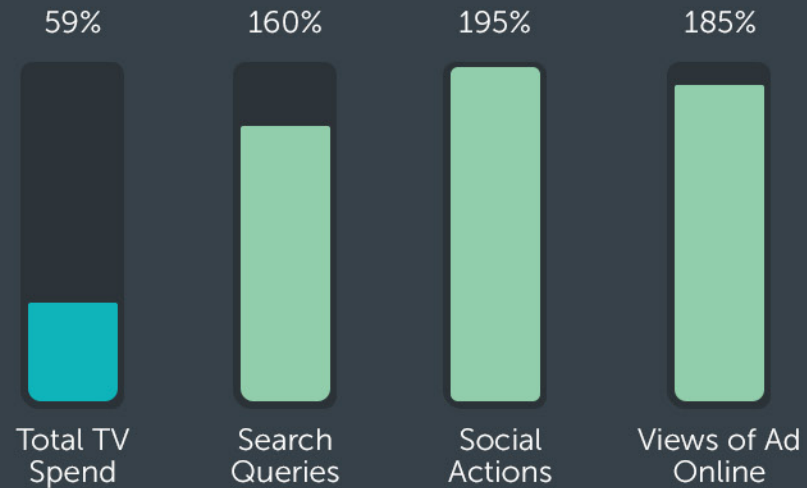


'15 vs '16

Source: TV spending based on Nielsen Ad Intel, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2015-2016. Digital actions based on iSpot.tv and reflects social actions (posts, likes, shares and comments related to TV ads on Facebook, Twitter, YouTube, iSpot.tv). Digital actions are correlated to TV ad airing data.

Similarly, Among Category Game-Changer "Disruptor" Brands, TV Piques Curiosity And Inspires Engagement

Increase in TV Spend &
Increase in Digital Actions



'15 vs '16

Source: TV spending based on Nielsen Ad Intel, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), CY 2015-2016. Digital actions based on iSpot.tv and reflects social actions (posts, likes, shares and comments related to TV ads on Facebook, Twitter, YouTube, iSpot.tv). Digital actions are correlated to TV ad airing data.

There Is Also A Clear Correlation Between TV Spend and Business Growth

“

Taco Bell plans to “spend a greater amount on TV ads in 2017. TV is important to us. TV still works for us.”

- Marisa Thalberg, CMO Taco Bell,

VAB Has Done Exhaustive Attribution Analyses, Covering 400+ Brands And 20 Categories

Year 1:

What's Driving Digital?

Year 2:

6 Call-to-Action Ad Categories

Year 3:

What's App'ning!!
The TV-Traffic Correlation
for Mobile Apps

Year 4:

Shifting Gears: How TV Drives
Online Traffic for Automotive

The Market-Changer's Playbook:
Why TV is Where Disruptors Go
To Grow Big



Year 1:

What's Driving Digital?

85% Of "Pure-Play" Internet Brands Exhibited A Direct Correlation Between TV Spend & Website Traffic

When **Spend DOWN**
-22% less unique
visitors (on average)

When **Spend UP**
+33% more unique
visitors (on average)

Year 2:

6 Call-to-Action Ad Categories

82% of the "Call-To-Action" Brands
Exhibited a Direct Correlation Between
TV Spend & Website Traffic

**-10% less TV Spend
-9% less Unique Visitors
(on average)**

**22% more TV Spend
+24% more Unique Visitors
(on average)**

Source: Nielsen AdViews, TV spend (cable TV, broadcast TV, SLC TV, SLN TV, syndication, spot TV) Feb 2014-Mar 2015; comScore, mediameitrix multiplatform, unique visitors Total Audience (P2+). Spend & unique visitors based on Feb-Aug '14 vs. Sep '14-Mar '15 monthly avg

Year 3:

What's App'ning!! The TV-Traffic
Correlation for Mobile Apps

77% of Mobile Apps Exhibited A
Definitive Correlation Between TV
Spend And Website Traffic

"When Off" TV Months

When *Spend DOWN*
-20% less unique
visitors (on average)

"When On" TV Months

When *Spend UP*
+25% more unique
visitors (on average)

Year 4:

Shifting Gears: How TV Drives
Online Traffic for Automotive

75% of Automotive Manufacturers
Exhibited a Direct Correlation Between
TV Spend & Website Traffic

-10% less TV Spend
-12% less Unique Visitors
(on average)

+16% more TV Spend
+37% more Unique Visitors
(on average)

Year 4:

The Market-Changer's Playbook:
Why TV is Where Disruptors
Go To Grow Big

14

"Brand Building" Disruptor Brands Saw
Double & Triple Digit Increases To Their
Website Traffic After They Launched A
TV Campaign

Source: comScore mediametrix multiplatform media trend; Total audience (P2+), March '14 – February '17. Nielsen Ad Intel, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), March '14 – February '17. N/A = not enough traffic for comScore to measure.

The five major, established "digital" disruptors collectively spent almost **\$1.4 Billion** on TV in 2016, nearly triple what they spent just 5 years ago



Source: Nielsen Ad Intel. TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndication TV. Reflects all monitored TV spend by parent company; Google includes YouTube.

Common (Mis)perceptions And Realities

Perception: Viewers are moving to online video;
YouTube's audience has grown greater than that of TV

The TV audience is **15x larger** than that watching video on a PC. For every hour a viewer spends with YouTube, she spends over 13 with TV

Perception: TV is only relevant to certain demos, and definitely not Millennials

Younger Millennials spend **10x more** time watching TV than video on a Smartphone

Common (Mis)perceptions And Realities

Perception: Nobody's watching live TV anymore - people are cord-cutting, time-shifting, or watching SVOD

Only **4%** of Households are broadband only; more than **77%** of Primetime viewing is live

Perception: TV content isn't relevant and so TV advertisers will be viewed as out of touch

Nearly **80%** of primetime Twitter trending topics were about ad-supported TV

Common (Mis)perceptions And Realities

Perception: TV advertisers don't need to be on both the network and its website

Across a variety of genres, TV brand websites rank in the **top 5** for time spent

Perception: TV is too upper funnel and has limited ability to make a sales impact or drive consumers online

88% of pure-play Internet brands saw a direct correlation between TV spend and site visits

Common (Mis)perceptions And Realities

Perception: Bigger brands don't need TV and smaller brands can't benefit from it

TV drives **double-digit** increases in web traffic for niche brands like Birchbox, to larger, more established brands like GM

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No platform drives business like
TV's premium video-at-scale