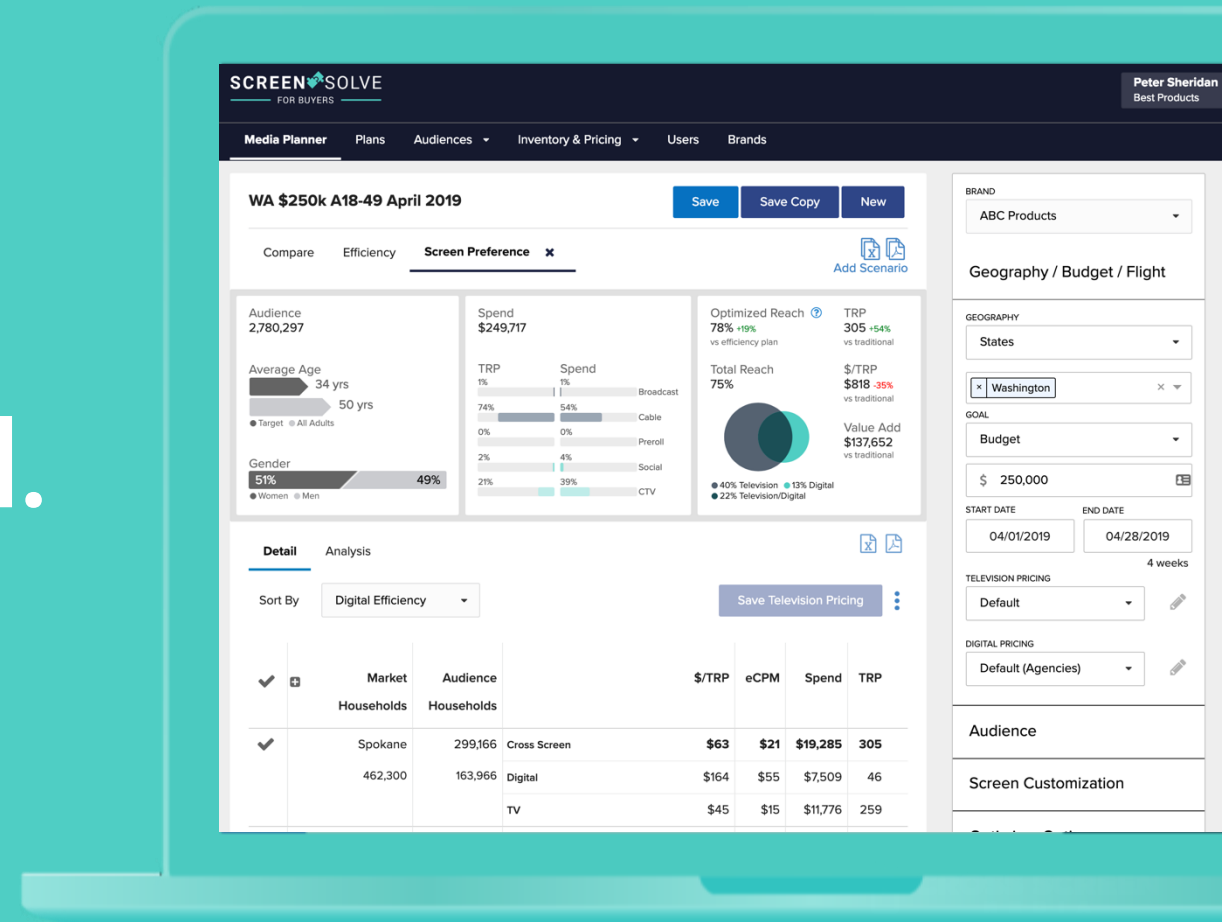
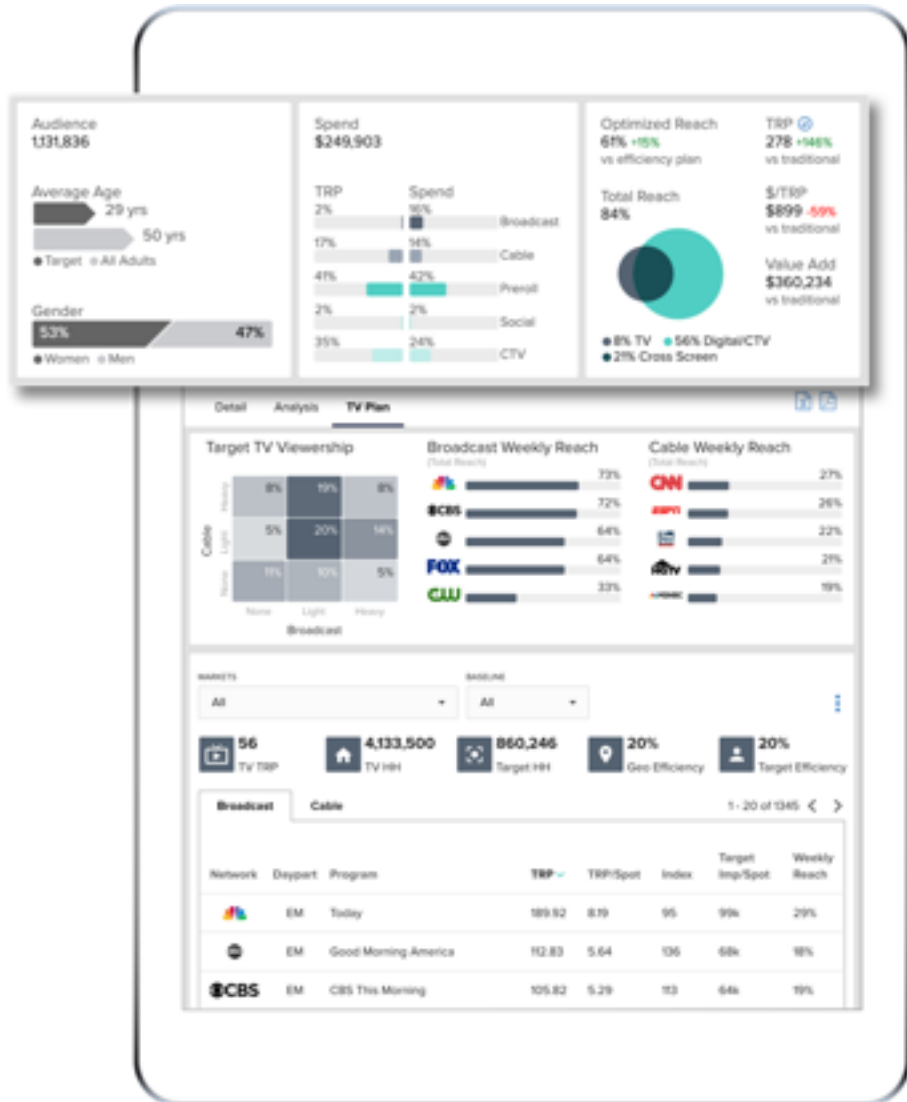




Video advertising is hard.
We make it easy.





Cross Screen Media is building the next generation **convergent TV** platform.

Our mission is to change the way **\$114B** of video advertising is bought and sold by making the process easy.

The State of the Screens

Agenda

1. The Video Ad Market + 2 Big Shifts (10 minutes)
2. What A Streaming Hour Looks Like (5 minutes)
3. A Win For All Sides (5 minutes)



Level Set on Terms

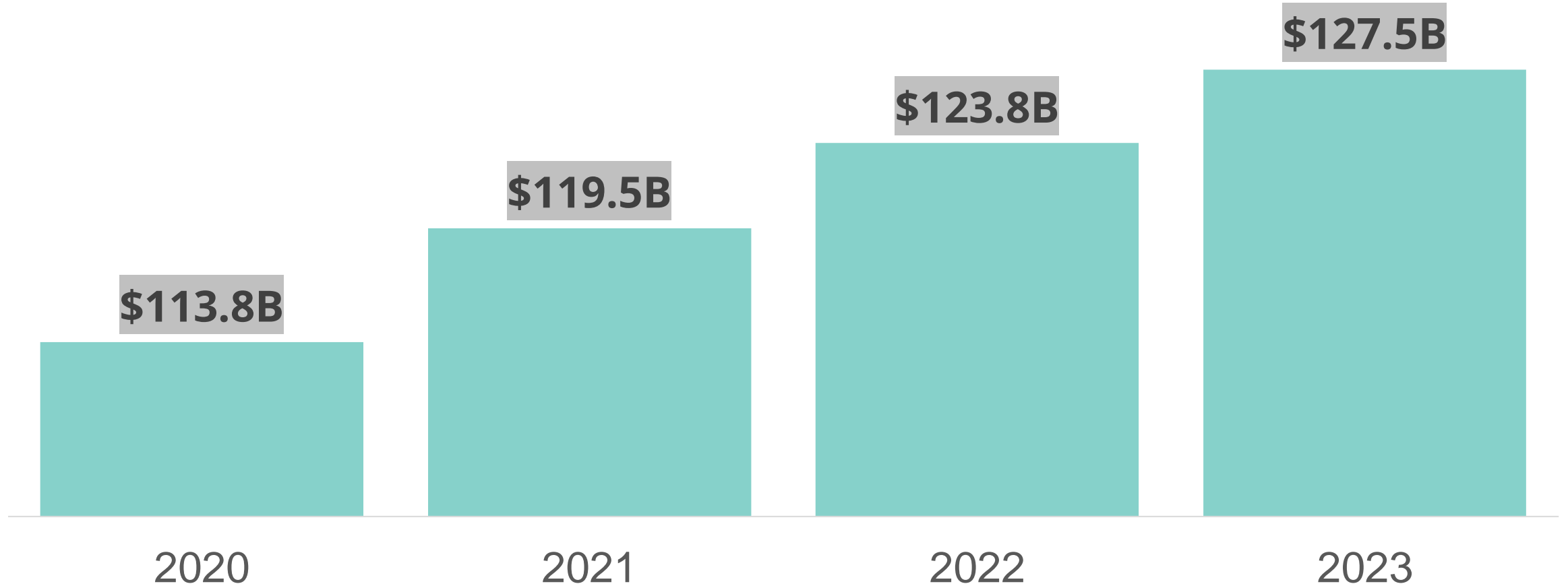
Terms

- 1. Video Ad Market** – This encompasses the entire U.S. video market including television (broadcast, cable, satellite, etc.) and digital (CTV/OTT, social, mobile/desktop, etc.)
- 2. Targeted** – Any ad that is targeted to a specific 1st and/or 3rd party data set (CRM, etc.). This includes both addressable (1:1) as well as data-driven linear.
- 3. Non-Targeted** – Any ad that is targeted to a traditional demo such as age/gender.



The Video Ad Market + 2 Big Shifts

The Video Ad Market (U.S. Only)

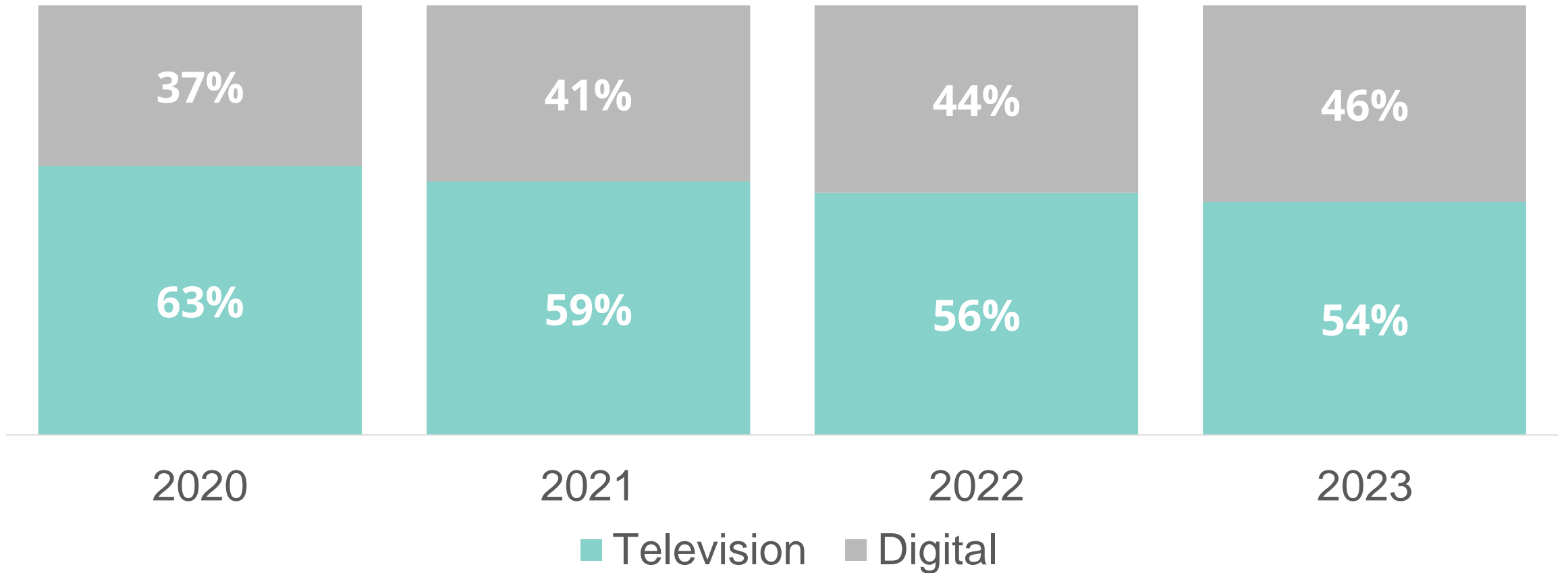


Source: eMarketer



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Big Shift #1: Television → Digital Video

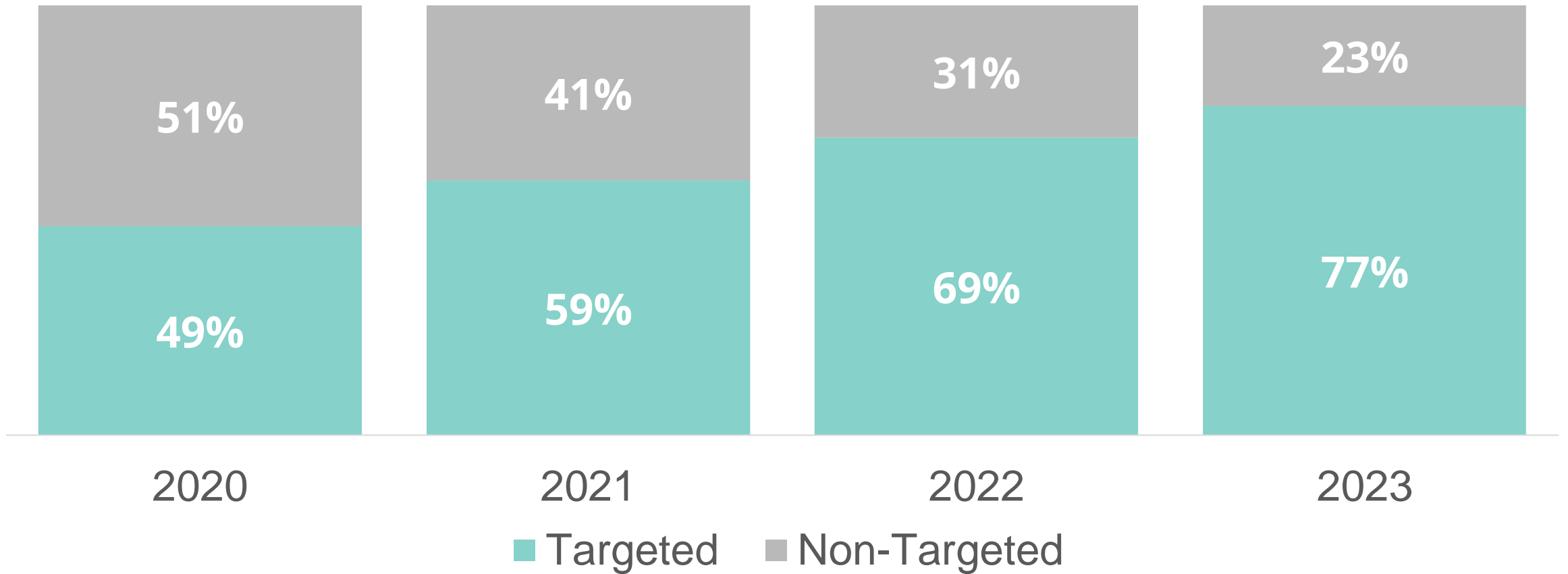


Source: eMarketer



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Big Shift #2: Age/Gender → Targeted

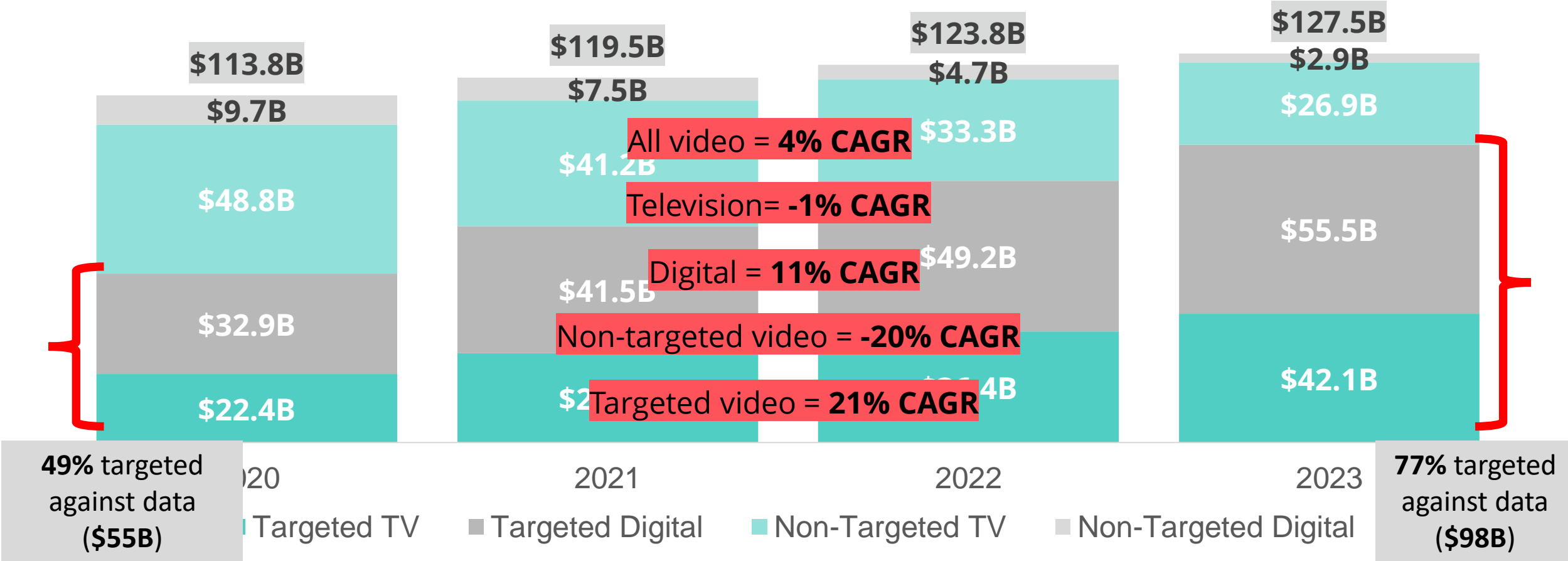


Source: Internal Data



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Targeted Video Ad Market = \$98B by 2023



What a streaming hour looks like

Linear TV vs. CTV/OTT: 1 Hour of Viewing (Excludes Ad-Free Viewing)

	Linear TV	CTV
Ad-Supported %	100%	100%
Ad-Supported #	1.0	1.0
Ad Load	16.0	4.0
Ad Minutes/Hour	16.0	4.0
CPM \$	\$4.00	\$30.00
Ad Revenue/Hour	\$0.06	\$0.12

100%
increase



A Win for All Sides

What Everyone Wants

- 1 Consumers:** Video content on-demand on any device with fewer ads.
- 2 Advertisers:** More customers/revenue. Higher return on ad spend (ROAS)
- 3 Networks:** A higher share of consumers time w/ video. More money from advertisers.



A Wish List for the Buy Side

- 1 Build up **cross screen** teams that are comfortable (not experts) in buying/evaluating all forms of video advertising.
- 2 Make your audience data the center of media/investment strategy.
- 3 Evaluate all video advertising against consistent metrics for audience and attention (viewability, duration, etc.)



A Wish List for the Sell Side

- 1 Build up **cross screen** teams that are comfortable (not experts) in selling all forms of video advertising.
- 2 Make your customers audience data the center of your pitch.
- 3 Evaluate **all video advertising (beyond your own)** against consistent metrics for audience and attention (viewability, duration, etc.)



The Political Ad Market



2020 POLITICAL SPENDING PROJECTIONS

Broadcast. Cable. Digital Video.

Did You Know?

- The political video ad market will be **\$5.8B** during the 2020 cycle
 - ↑ **\$2B** from 2018
 - ≈ **4-5%** of the entire U.S. video ad market
 - **17%** of all video ad growth
 - CAGR
 - **5%** for all video advertising
 - **16%** for political video advertising

Download our FREE 10-page report @ StateOfTheScreens.com



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