



CableNation

Media Comparisons

Ad-Supported Cable Television

STRENGTHS

- Deeper consumer connections:
 - Geographic, Demographic, Psychographic, etc.
- Viewer migration from Broadcast to Cable
- High social buzz programs & networks
- Sight, sound & motion
- Intrusive/immediate impact
- True cross platform medium
- Product integration opportunities

WEAKNESSES

- Full Cable market coverage only available in I+ markets
 - Sales partnership with telcos/Satellite's to create full market coverage
- Lower rated programs
- Audience fragmentation

OPPORTUNITIES

- More markets added to I+
- Set-top box data
- VOD – room for growth in usage / awareness among consumers
- TV Everywhere – live / VOD programming available outside the home
- Re-broadcast of programs on alternative video devices (computer, tablet, streaming services)

THREATS

- Over the top streaming services (i.e. Netflix)
- Ad-skipping (DVRs)
- Alternate leisure devices (i.e. gaming)
- Cord cutting

Broadcast Television

STRENGTHS

- Broad reach / quick audience cume
- Full market coverage
- Intrusive / Immediate impact
- Sight, sound & motion

WEAKNESSES

- Declining ratings
- High out of pocket cost / limited inventory / inefficient
- Weak summer ratings / programming
- High production costs
- No ability to target specific areas within a market

OPPORTUNITIES

- Re-broadcast of programs on alternative video devices (computer, tablet, streaming services)
- VOD – room for growth in usage / awareness among consumers
- TV Everywhere – live / VOD programming available outside the home

THREATS

- Continuing shift of viewers to Cable
- Ad-skipping (DVRs)
- Over the top streaming services (i.e. Netflix)
- Alternate leisure devices (i.e. gaming)

Internet

STRENGTHS

- Drive directly to website / purchase
- Engaged audience
- Strong targeting capabilities
- Ability to interact with ad
- Cost efficient
- Flexibility on video ad length

WEAKNESSES

- Advertising seen as too intrusive
- Quality control of ad environment
- Declining click through rates
- Unreliable measurement
- Advertising clutter
- Consumer connect with content and placement varies widely by site
- Fragmented audience

OPPORTUNITIES

- Faster connections, continuing migration to broadband
- Expanded video/programming offerings
- Consumer behavior shift to 'always connected' lifestyle

THREATS

- Alternative entertainment/information devices
- Do not track law
- Privacy issues

Magazines

STRENGTHS

- Psychographic & demographic targeting capabilities
- Engaged audience
- Ads can be reviewed / studied at readers leisure
- Portable / tangible
- Variety of creative sizes / units
- Trusted source / editorial voice

WEAKNESSES

- Non-intrusive – reader can ignore ad
- Long audience cume - takes time to build reach
- Most publications are not mass reach
- Long shelf life - difficult to promote a time sensitive message
- Clutter
- Readership and ad spend down

OPPORTUNITIES

- Online companion website
- New niche enthusiast categories

THREATS

- Continuing migration to TV & internet & for news/information
- Consumer behavior shift towards non-print news source

Newspapers

STRENGTHS

- Immediate reach
- Allows in-depth product explanation
- Geographic targeting
- Variety of creative ad sizes
- Tangible
- Good for price shopping / coupons
- Short lead time

WEAKNESSES

- Declining circulations
- High out of pocket to achieve national reach
- Readers rarely look at all sections
- Skews older (50+)
- Visual only, non-intrusive, inferior production quality
- Clutter / Short ad life
- News not as timely due to internet

OPPORTUNITIES

- Online companion websites
- Mobile apps

THREATS

- Alternate, more immediate news sources: Cable news, Internet sites
- Consumer shift towards less traditional news sources(i.e. twitter, buzzfeed)

Radio

STRENGTHS

- High frequency
- Targeted
- Copy change flexibility
- Low out of pocket pricing
- Mobility – in the car listening
- Low production costs
- Promotions, community tie-ins

WEAKNESSES

- Lack of visual
- Poor measurement
- High commercial clutter
- Audience is not actively engaged
- Time spent listening declining each year
- Fragmented / low rated

OPPORTUNITIES

- HD Radio
- Podcasting

THREATS

- Expansion of Satellite Radio
- iTunes / digital download of music
- Online radio stations (i.e. Pandora)
- Smart cars with radio apps

Out of Home

STRENGTHS

- Broad reach
- Ability to target specific locations
- Large units can make a strong impact
- All day, all week exposure
- Cost efficient by unit
- High frequency

WEAKNESSES

- Short exposure time (4-8 seconds)
- Limited message capability
- True mass media – no demo targeting
- Questionable measurement
- Creative can be vandalized or easily damaged
- High out of pocket for national coverage
- Audience is disengaged

OPPORTUNITIES

- Almost unlimited new venues possibilities (i.e. elevators, bathrooms, etc)
- Creative beyond a billboard – video capabilities

THREATS

- Governmental / Environmental regulations
- Mobile – is it the new out of home?

Mobile

STRENGTHS

- Highly interactive
- Personal
- Immediate
- Geographic targeting
- Directly drives to website

WEAKNESSES

- Limited reach
- Ads viewed as intrusive by consumer
- Limited message length / size of ad
- Accidental click thru increases cost but not exposure

OPPORTUNITIES

- Higher smartphone ownership enables more video ads
- Ability to track consumer behavior / purchases
- Faster operating systems - better ad environment
- Bigger screens = more ad space

THREATS

- Privacy laws / restrictions

Social

STRENGTHS

- Targeted
- Highly interactive
- Personal
- “Friends” association
- 1 to 1 brand conversation
- Potential for brand / product advocacy
- Offer / coupons

WEAKNESSES

- Ads viewed as intrusive by consumer
- Limited creative flexibility
- Context & content control
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OPPORTUNITIES

- Micro-targeting of consumers
- Tracking consumer behavior
- More video integrations
- Deeper brand engagements/ conversations

THREATS

- Consumer backlash over ads leading to less time spent / involvement
- Potential for advertising clutter as social sites look to increase revenues
- Consumers are on the look out for the next cool thing – are you investing in the next ‘MySpace’?

Direct Mail

STRENGTHS

- Targeting by location, personal interest, buying habits
- Unlimited message length
- Coupon offerings
- Relatively easy to track response
- Low cost per thousand

WEAKNESSES

- Non-intrusive – could be thrown away unlooked at or unopened
- Only as good as your mailing list
- Typically less than 0.2% response rate
- Production costs can be high depending on size of piece

OPPORTUNITIES

- Better mailing list companies: list services are getting better at tracking address changes, etc.

THREATS

- “Do not mail” list
- Internet / email
- Increased cost of materials / production
- Lack of reliability of the post office / potential for less days (i.e. no Saturday delivery)



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