

# CABLE NATION: Video Advertising Update



CableNation

# welcome

Your ask was “simple” – In recent meetings with agencies and advertisers the request of Cable was to “Give me a simple, comprehensive report about Cable in this complex environment”.

So what makes the “complex” simple?

\$120 billion dollars simplifies things.

The ad-supported Cable industry has spent \$120 billion dollars creating world class video content over the past five years, and that content is what your customers are watching in record numbers across every screen they consume.

Cable is leading and growing on every screen – simple enough?

Have a look at the 23 charts and 11 pages of this comprehensive report and you’ll see the results of this enormous on-going investment by US media’s most powerful brands.

While you’ve rightfully come to expect Cable brands to lead in TV, perhaps it’s the degree of leadership & continued growth on the Internet, on Tablets or on Smartphones that may surprise you.

With these record levels of popularity it’s also only natural that the 2013 Cable consumers are actively part of spreading the success story – over 70% of social TV activity is about Cable programming & brands; that’s overwhelming evidence of content-connected consumers – the type advertisers covet.

Please contact me directly [seanc@cabletvadbureau.com](mailto:seanc@cabletvadbureau.com) with any additional requests for video advertising information, insights and analysis. You can also find a trove of video advertising resources at our website: [www.theCAB.tv](http://www.theCAB.tv)

Enjoy the report!

Sean Cunningham, President-CEO, Cabletelevision Advertising Bureau

# Cable's Growing Across All Screens



A25-54 C3 Rating  
STD '11/12 vs. '12/13

**+2%**



Unique Viewers  
Feb. '12 vs. Feb. '13

**+9%**



Avg. Mobile  
Audience Increase  
Feb. '12 vs. Feb. '13

**+23%**



Cable's % of Social TV  
Activity Top 20 Shows  
Feb. '13

**71%**

# People are Watching Even More TV; HH Penetration is **Up** Slightly



# Cable's Ratings Fluctuations Have Been Minimal and our Leadership Extends Across Genres

## Ad-Supported Cable Primetime STD '12/13 (Thru Week 29) vs. YAG

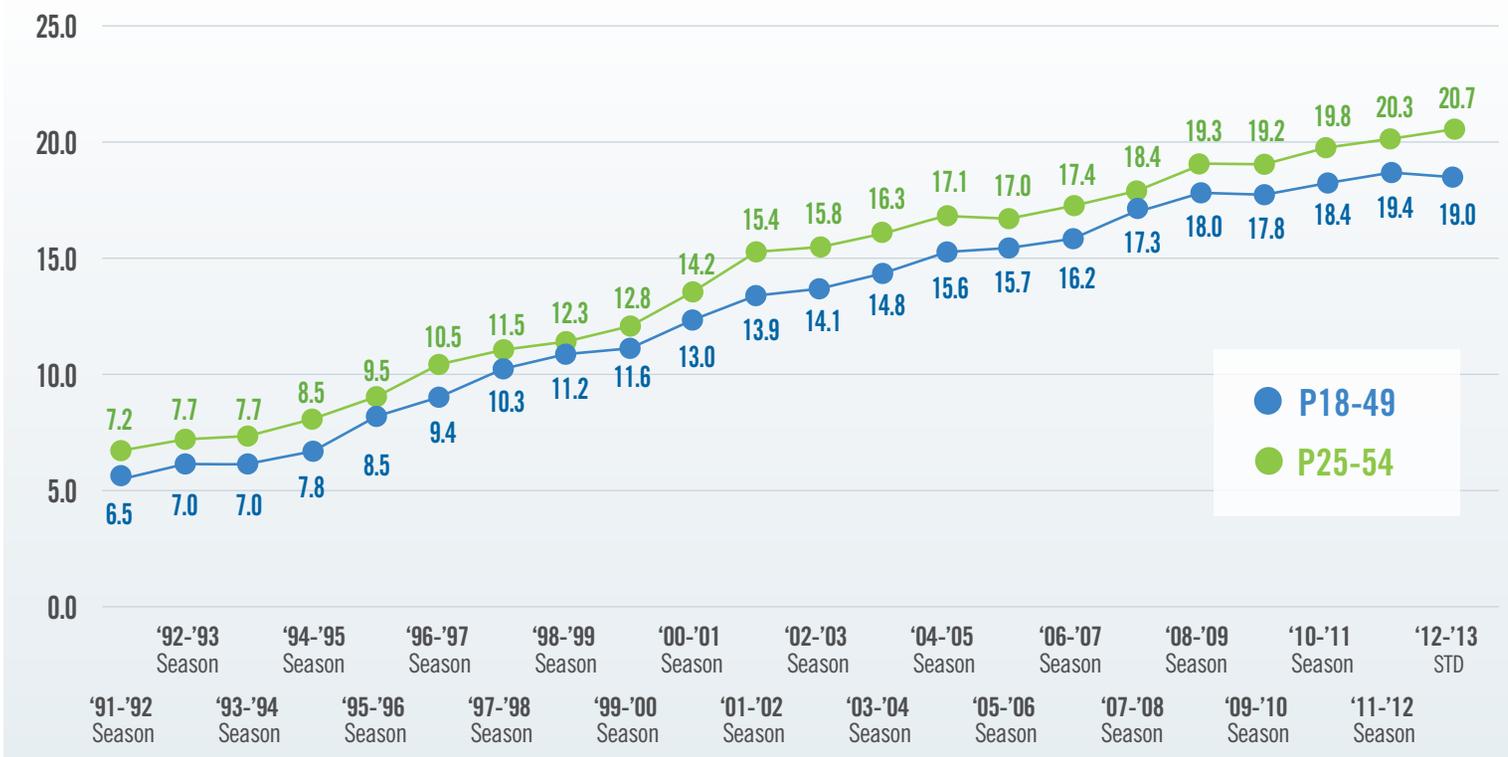
|        | C3 Rating: |
|--------|------------|
| HH     | +1%        |
| A25-54 | +2%        |
| A18-49 | -1%        |

## Ad-Supported Cable Sellable GRPs

| A18-49 GRPs |                  | A25-54 GRPs |                  |
|-------------|------------------|-------------|------------------|
| <b>92%</b>  | <b>Total Day</b> | <b>90%</b>  | <b>Total Day</b> |
| <b>75%</b>  | <b>Primetime</b> | <b>72%</b>  | <b>Primetime</b> |
| <b>92%</b>  | Comedy           | <b>89%</b>  | Comedy           |
| <b>80%</b>  | Drama            | <b>78%</b>  | Drama            |
| <b>99%</b>  | Kids             | <b>99%</b>  | Kids             |
| <b>83%</b>  | Sports           | <b>80%</b>  | Sports           |
| <b>99%</b>  | Feature Film     | <b>98%</b>  | Feature Film     |

# 21 Years of Continued Cable Momentum

**PRIMETIME AD-SUPPORTED CABLE RATINGS BY SEASON**  
(Live+7 U.S. AA%)

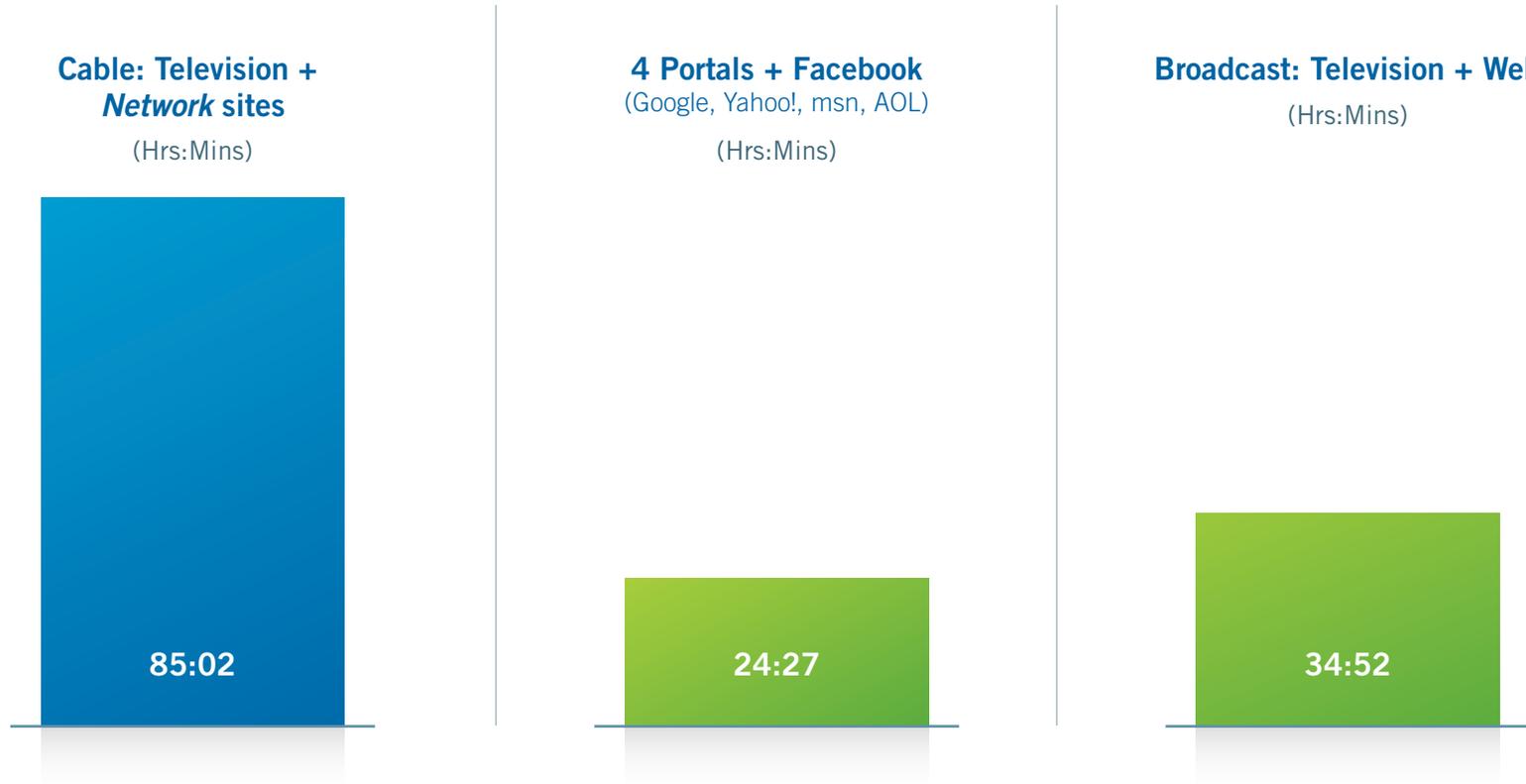


Source: Nielsen, Live+7 timeperiod rating; '12/'13 reflects STD

# Over 85 Hours per Month is Spent with Cable Network Brands on TV and Online

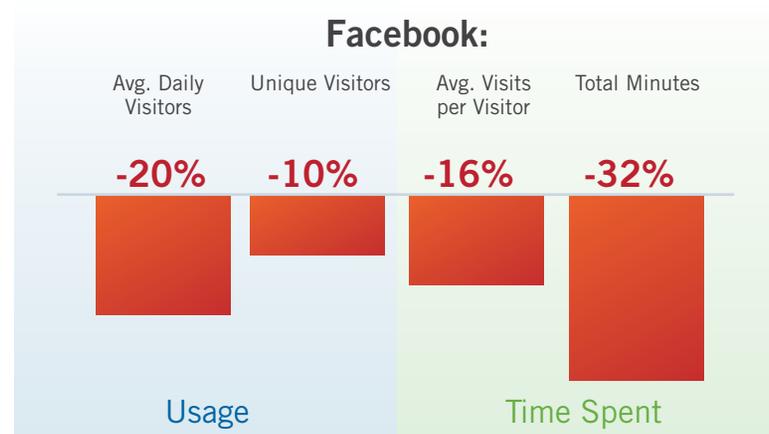
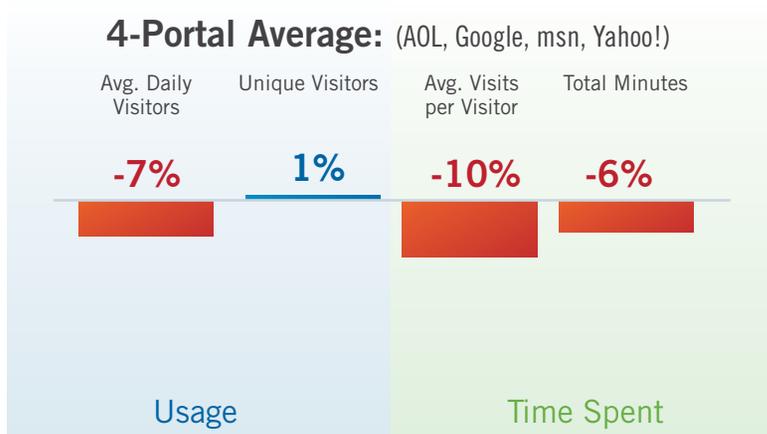
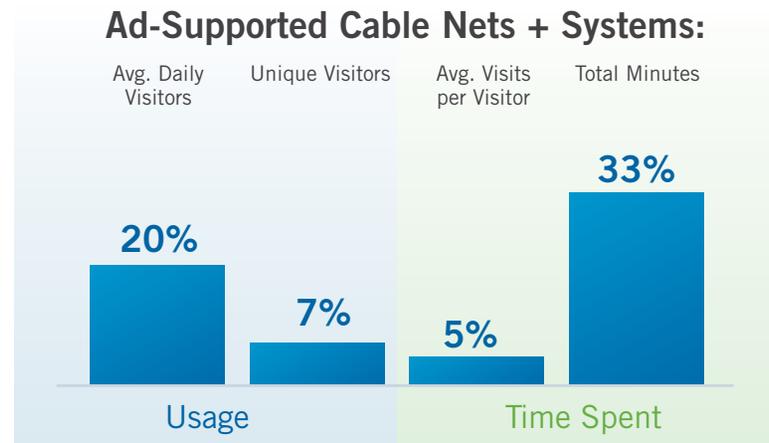
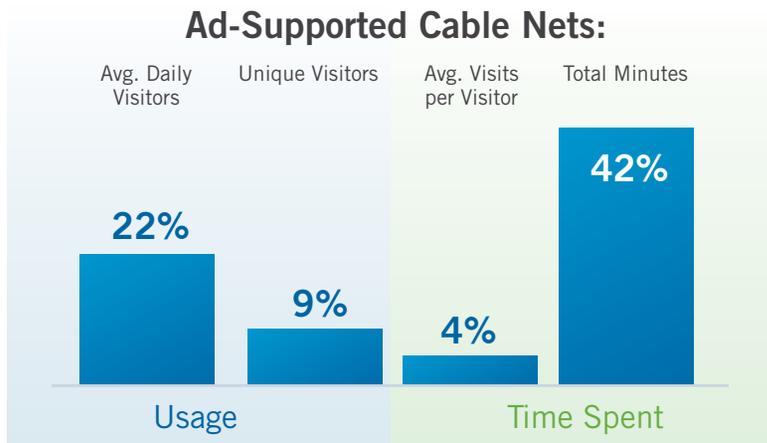
## Monthly Time Spent (March 2013)

(Average mins per visitor, Hrs: Mins)



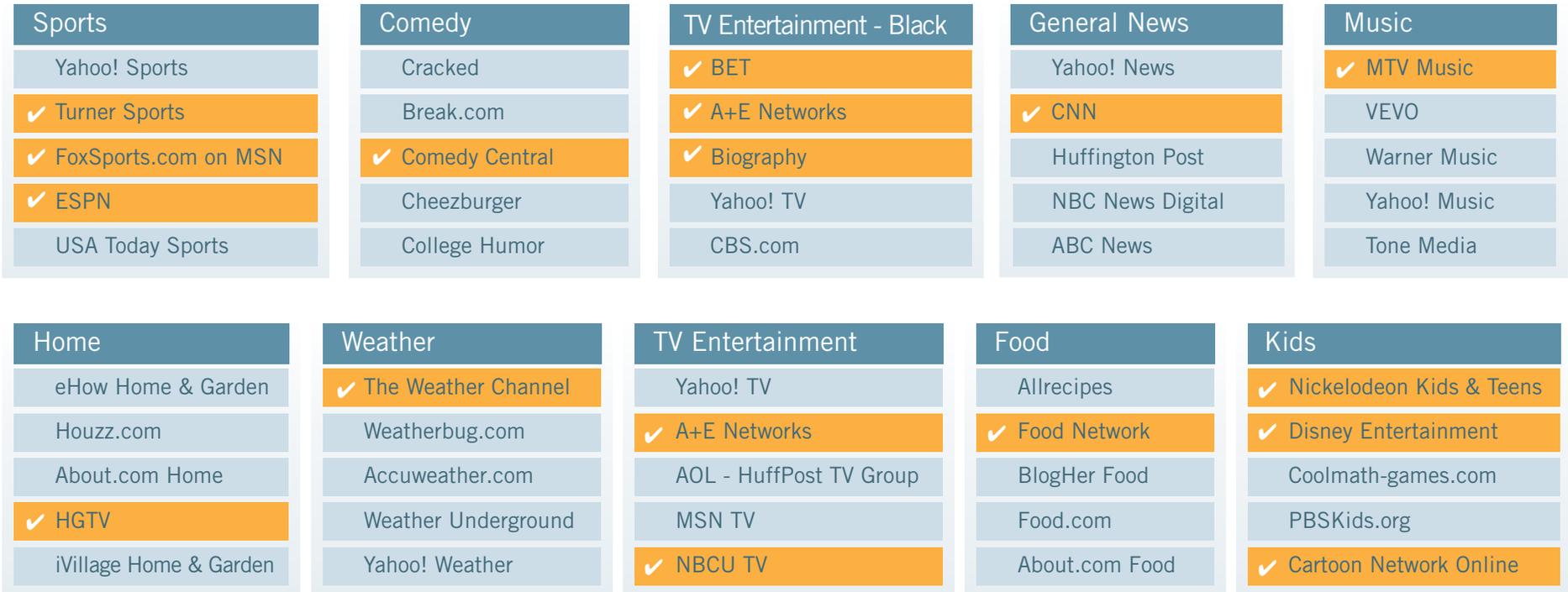
# The Popularity of Cable Content is Growing on the Internet While Big Portals and Facebook are in Decline

Feb '12 vs. Feb '13: % Change vs. YAG



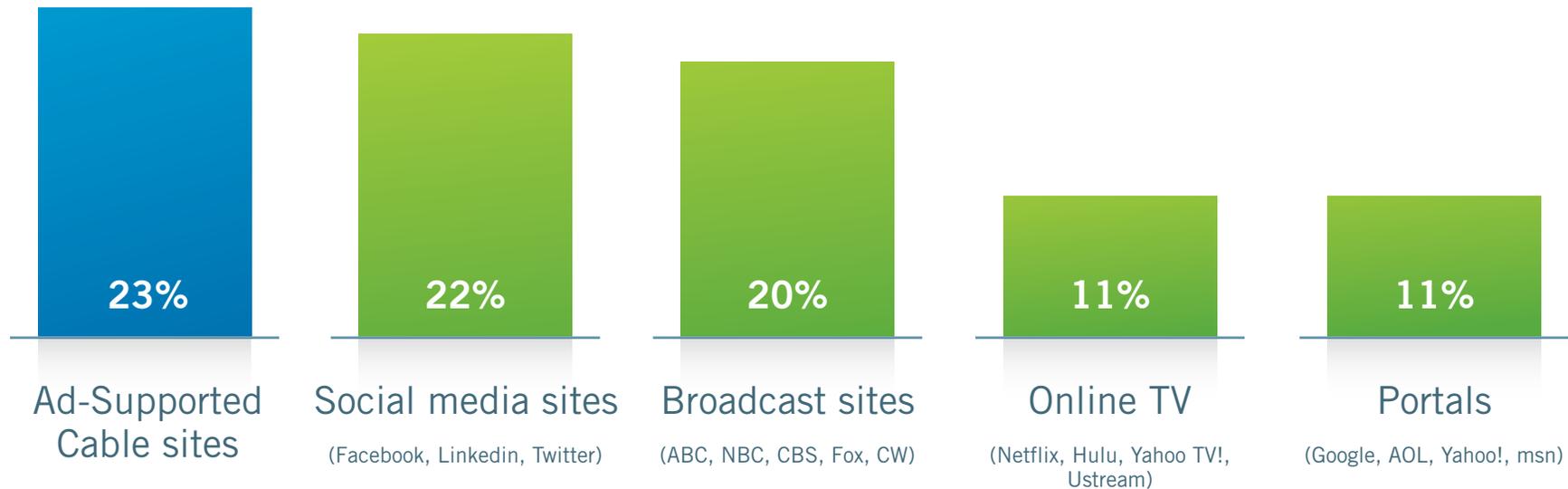
Source: comScore; Media Trend Report; February 2012 vs. February 2013; Represents average % change over all ad-supported Cable nets; Duplicated

# Branded Cable Content is the Most Sought After on the Internet... Across the Gamut of Content Genres



# Cable Content is Growing Faster Than Any Other on Mobile Devices

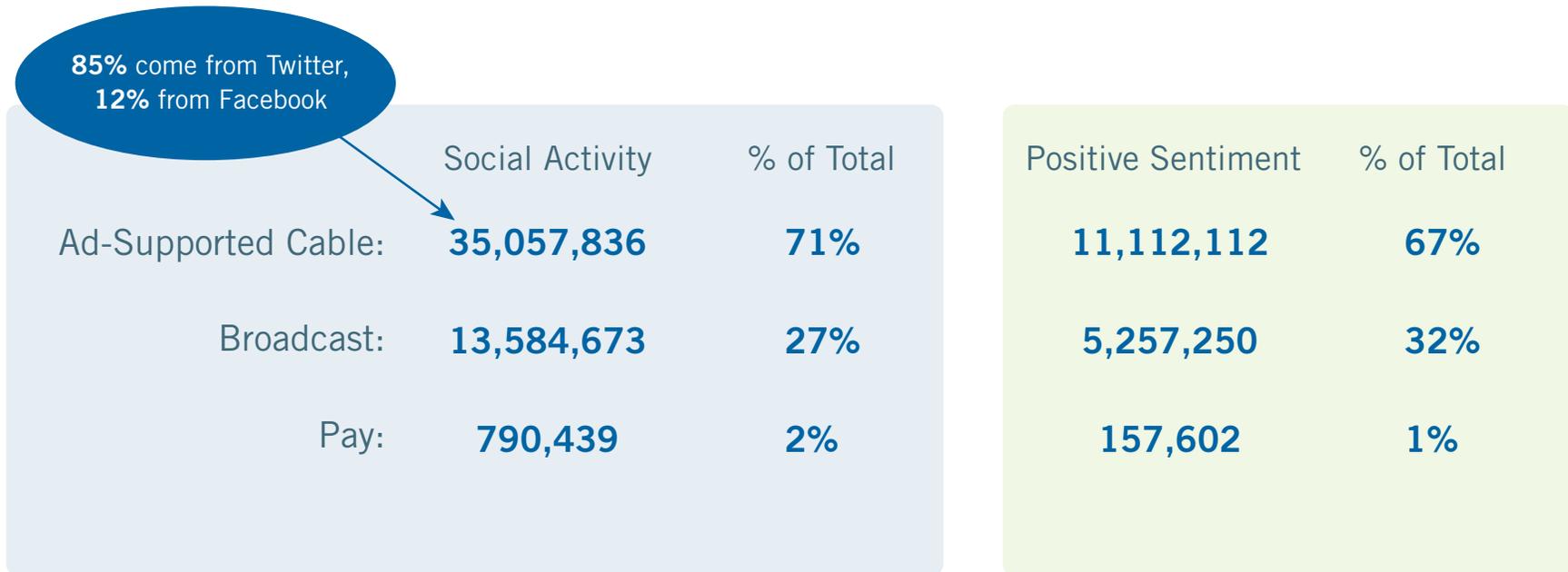
**% Average Increase in Audience With Mobile**  
(Feb '12 vs. Feb '13)



# 7 out of 10 Social TV conversations were about Ad-Supported Cable programs;

Two-thirds of Cable comments reflected positive sentiment about the program

## February 2013 Analysis – Top 20 Social Buzz Primetime Programs

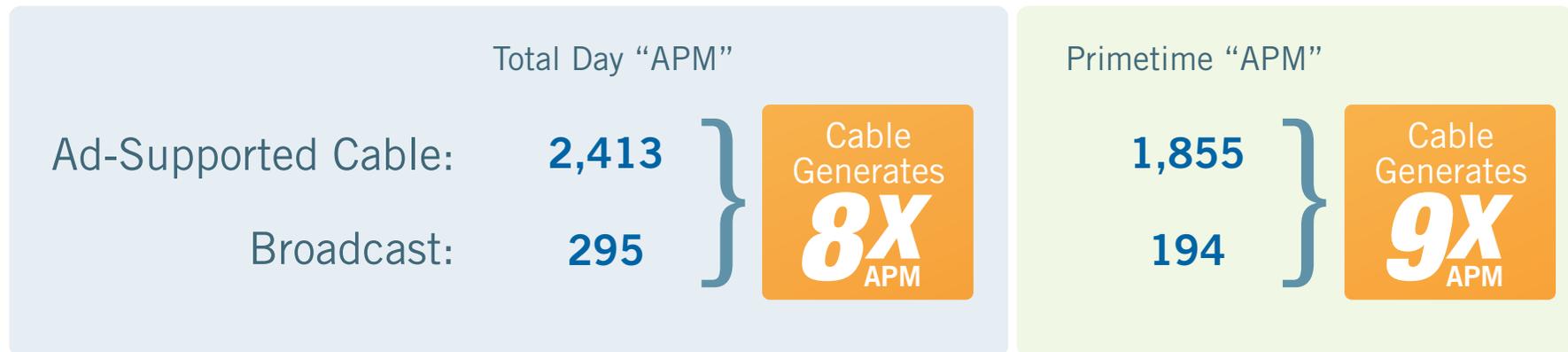


Source: Trendrr; 2/1-2/28, Top 20 Programs ranked by social activity, Specials and Spanish programming excluded

# Cable Programming is Also Much More Likely to Generate Social Engagement from Their Audience Than Broadcast

## February 2013 Analysis – Top 20 Social Buzz Primetime Programs

Social Buzz “APM” (Activity Per Thousand)



Source: Trendrr; 2/1-2/28, Top 20 Programs ranked by social activity, Specials and Spanish programming excluded, Social buzz Activity per thousand (APM) calculated by total monthly social activity top 20 programs / total P12+ impressions for same shows

# By and Large, Broadcast Program Ratings Don't Correlate To Higher Social Buzz

## Social TV Buzz vs. Premium Priced Broadcast Programs

Of the Top 20 Nielsen rated Broadcast shows, only 3 programs ranked in the Top 20 for Social Buzz the week of February 25th

| Network | Program               | A18-49 Rtg Rank | Social Buzz Rank |
|---------|-----------------------|-----------------|------------------|
| ABC     | MODERN FAMILY         | 1               | 39               |
| FOX     | AMERICAN IDOL         | 2               | 3                |
| CBS     | NCIS                  | 3               | 36               |
| CBS     | 2 BROKE GIRLS         | 4               | 83               |
| CBS     | HOW I MET YOUR MOTHER | 5               | 46               |
| FOX     | FOLLOWING, THE        | 6               | 30               |
| CBS     | CRIMINAL MINDS        | 7               | 32               |
| CBS     | NCIS: LOS ANGELES     | 8               | 90               |
| ABC     | BACHELOR, THE         | 9               | 17               |
| FOX     | NEW GIRL              | 10              | 59               |

| Network | Program              | A18-49 Rtg Rank | Social Buzz Rank |
|---------|----------------------|-----------------|------------------|
| CBS     | MIKE & MOLLY         | 11              | 156              |
| ABC     | CASTLE               | 12              | 22               |
| ABC     | ONCE UPON A TIME     | 13              | 55               |
| CBS     | SURVIVOR: CARAMOAN   | 14              | 69               |
| CBS     | RULES OF ENGAGEMENT  | 15              | 339              |
| CBS     | BIG BANG THEORY, THE | 16              | 14               |
| FOX     | BONES                | 17              | 52               |
| CBS     | CSI                  | 18              | 48               |
| CBS     | AMAZING RACE 22      | 19              | 74               |
| NBC     | CHICAGO FIRE         | 20              | 81               |



# CableNation

CABLETELEVISION ADVERTISING BUREAU

If you would like additional video advertising information, insights or analysis please visit our website at [www.thecab.tv](http://www.thecab.tv) or feel free to contact us directly:

**Sean Cunningham**

President & CEO  
212-508-1223

[seanc@cabletvadbureau.com](mailto:seanc@cabletvadbureau.com)

**Chuck Thompson**

EVP

212-508-1211

[chuckt@cabletvadbureau.com](mailto:chuckt@cabletvadbureau.com)

**Danielle DeLauro**

SVP Strategic Sales Insights

212-508-1239

[danielled@cabletvadbureau.com](mailto:danielled@cabletvadbureau.com)