



Get Real: Video Advertising 2015

Fact vs. Perception on the Video Frontier



Why?

Get Real: Video Advertising 2015

New vehicles for video advertising have introduced a flurry of stats, claims and comparisons. The advertising world has paid attention.

The result is a cloudy picture.

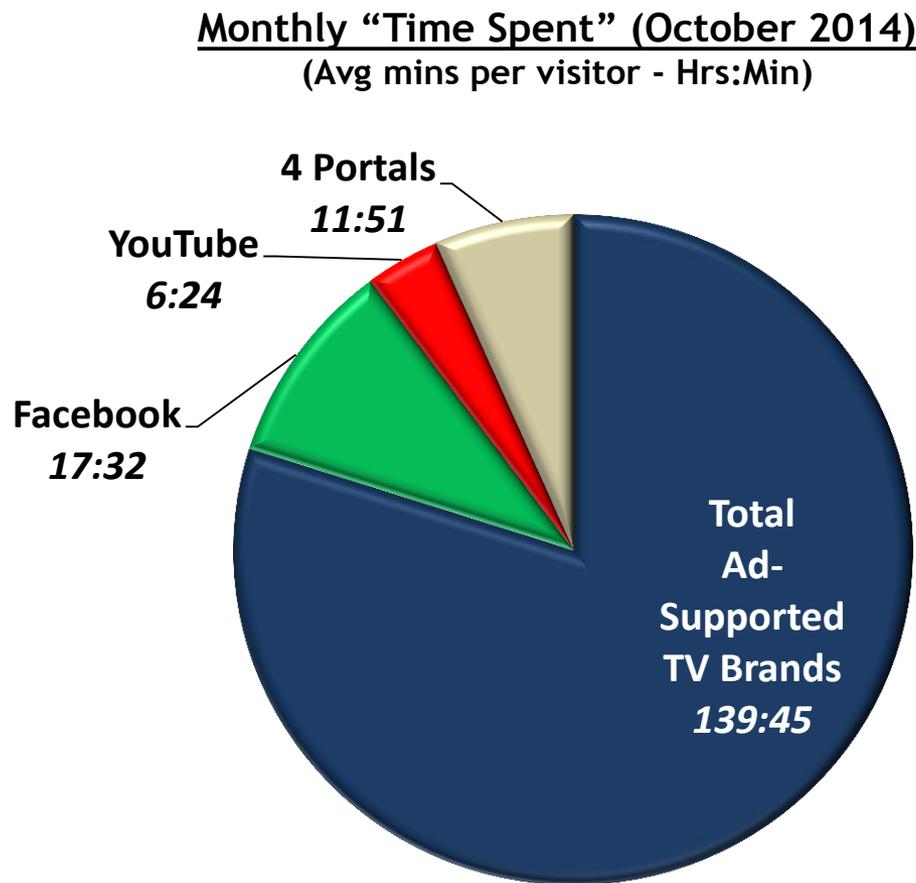
Media pros need clarity on the true scale of their various opportunities in video - so they can focus on the vehicles of greatest attention and mobilize people to buy more stuff.

To provide that clarity, we applied industry trading currency (Nielsen & ComScore) to show where U.S. consumer attention is distributed among the main 2015 video advertising options.

Scale

The Average US Consumer Spends 175 Hours per Month with Ad-Supported TV Plus 4 Portals/YouTube/Facebook

The Split: 80% Ad-Supported TV, 20% Plus 4 Portals/YouTube/Facebook



Source: Nielsen Npower Live+7 October 2014 P2+, CAB analysis of comScore duplicated October 2014 data (mediamatrix, multiplatform). Cable Television represents all measured Ad-Supported Cable nets; Cable network websites represents 61 cable network websites. Broadcast Television represents FOX, CBS, NBC, ABC, iON and CW. Total Ad-Supported TV Brands include cable + systems + broadcast: TV, Internet and Mobile

Scale

The Different Forms

Video ad options can be sorted into two groups.

Multi-Screen
TV
Brands/Channels



Content-Driven
Audience Assembly
with Targeting
and Critical Mass



Ad Tech
Brands/Channels



Data-Driven
Precision Targeting
with Algorithmic
Audience Aggregation

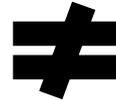


Scale

The mistake - is a mindset or strategy that looks to use the Ad Tech video brands as a surrogate, substitute or replacement for the Multi-Screen TV brands.

Multi-Screen
TV
Brands/Channels

Ad Tech
Brands/Channels



Content-Driven
Audience Assembly
with Targeting
and Critical Mass



Data-Driven
Precision Targeting
with Algorithmic
Audience Aggregation



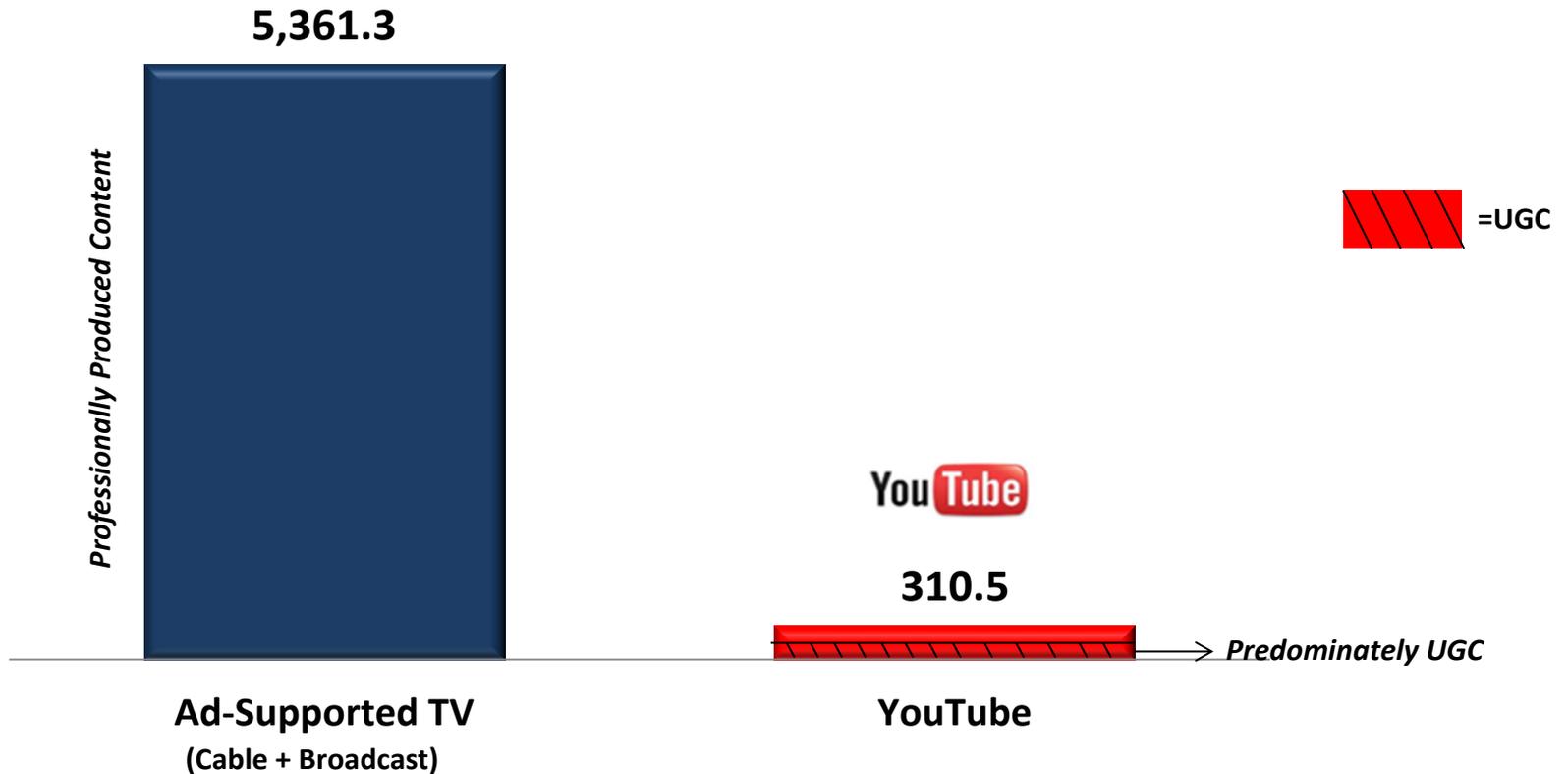
Ad tech video works best as a targeted extension of the multi-screen TV plan.

Scale

Time Spent on TV vs. YouTube Split: 95% TV, 5% YouTube

Monthly "Time Spent" Average (Minutes Per Viewer)

Total Ad-Supported TV vs. All YouTube Video

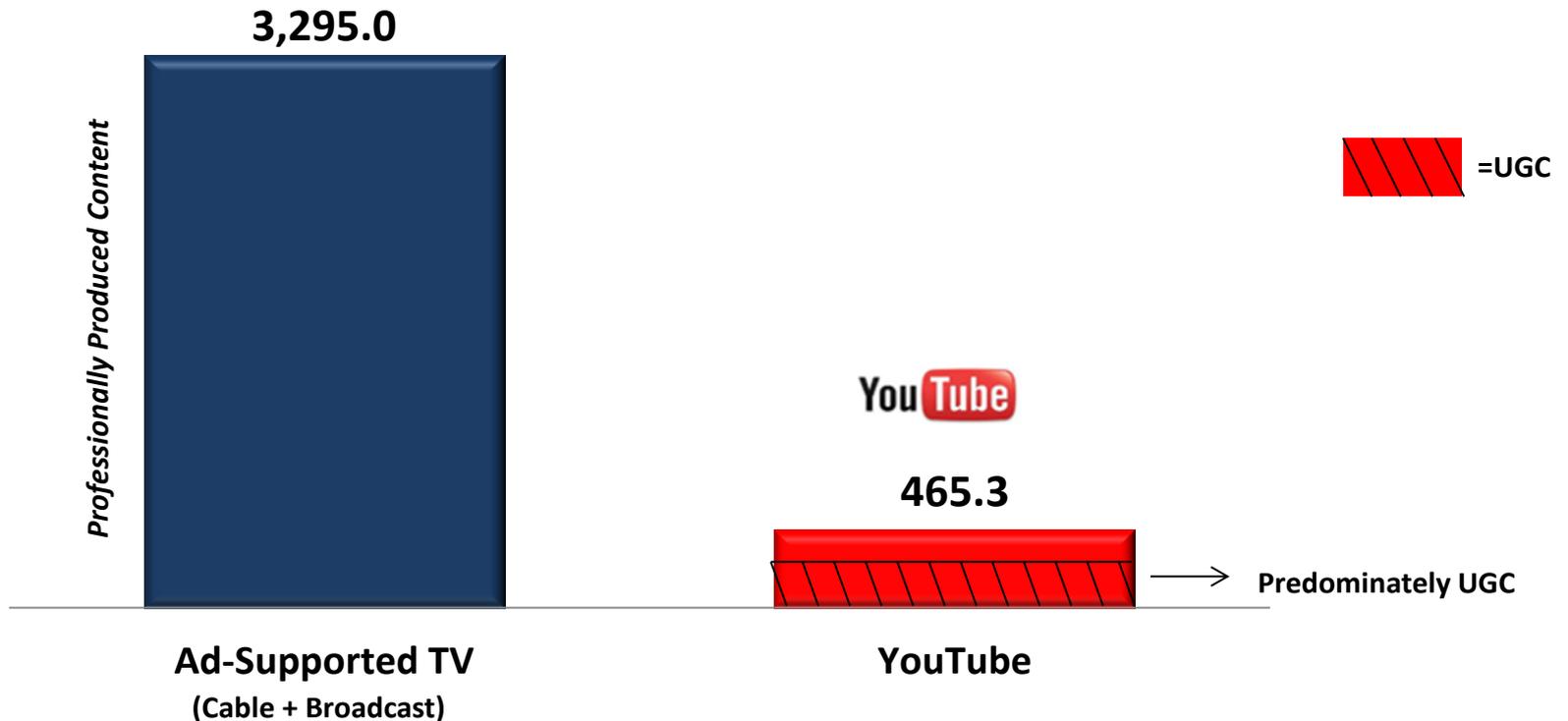


Scale

Time Spent on TV vs. YouTube 18-24 split: 88% TV, 12% YouTube

Monthly "Time Spent" Average (Minutes Per P18-24 Viewer)

Total Ad-Supported TV vs. All YouTube Video



Scale

Drilling Down to “One Program” Size Another look at scale...

The Monthly Impressions of One TV Program
 (“Property Brothers” - Sept. 2014)



Total Monthly Impressions (Sept '14)

2,367.6 MM

Equals The monthly views of The Top Ten
 YouTube channels combined (Sept. 2014)



Total Monthly Video Views (Sept '14)

2,355.4 MM

Represents almost 15,000 channels

Scale

Drilling Down to “One Network” Size: Another look at scale...

The Monthly Impressions of One “Top 20”
TV Network (Food Network - Sept. 2014)

Equals The Monthly Views of ALL the
YouTube Channels Combined (Sept. 2014)



Total Monthly Impressions (Sept '14)

Total Monthly Video Views (Sept '14)

Food Network - 13,444.7 MM

All of YouTube - 13,067.6 MM

Scale

Content Across Screens

Americans spend more time with ad-supported TV content than they do with anything else online.



Average minutes per visitor/viewer

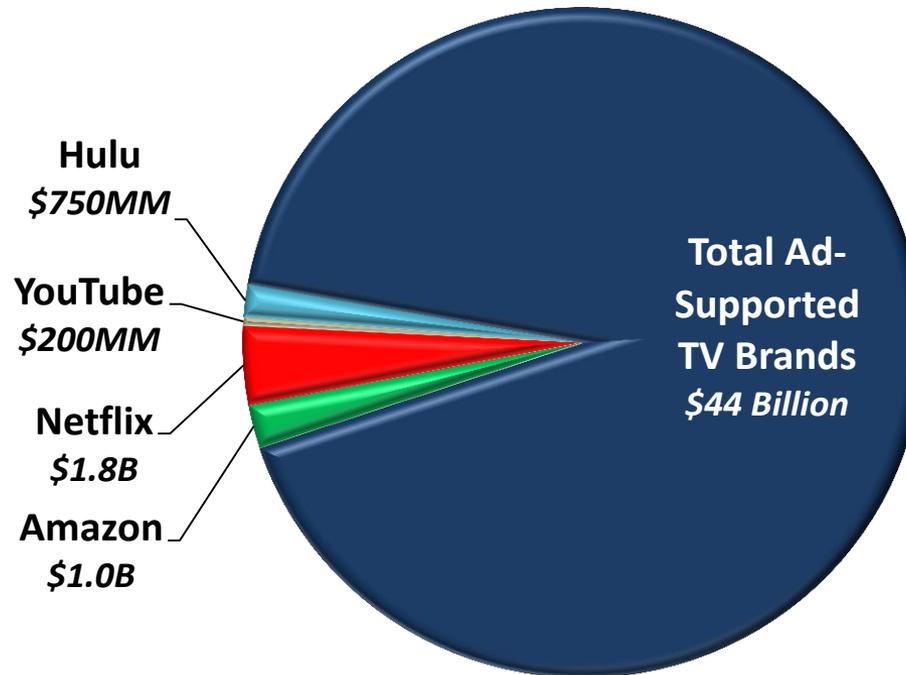
Source: Nielsen Npower Live+7 October 2014 P2+, CAB analysis of comScore duplicated October 2014 data (mediamatrix, multiplatform). Nielsen Social October 2014. Cable Television represents all measured Ad-Supported Cable nets; Cable network websites represents 61 cable network websites .

Broadcast Television represents FOX, CBS, NBC, ABC, iON and CW. 4 portals = Google, AOL, MSN, Yahoo!

Programming Investment

Most of the video content investment outside of TV brands is spent on buying proven TV content.

Estimated 2014 Content Investment (Original & Acquired)



Total Ad-Supported TV Brands include Cable & Broadcast

Sources: *TV Brands*: SNL Kagan; *Amazon*: based on various analyst reports including Barclays & BTIG cited by Business Insider; *Netflix*: CAB analysis of SNL Kagan & Netflix financial reports; *YouTube*: estimated based on YouTube announcements through their corporate blog postings in 2014; *Hulu*: estimated based on investment projections announced through Hulu. Estimates are for U.S. content rights only

Brands/Content

Attention Online

Content commitment makes ad-supported TV brands/content top of the internet ranks in key genres.

Sports

- ✓ **NBC Sports Network**
- ✓ **ESPN**
- NFL.com
- USA Today Sports
- ✓ **Bleacher Report**

Comedy

- College Humor/Cracked
- Bitecharge.com
- ✓ **Adult Swim**
- ✓ **Comedy Central**
- Break.com

TV Ent. Black

- ✓ **NBCU TV**
- ✓ **BET**
- Yahoo! TV
- ✓ **TV Guide**
- ✓ **A+E Networks**

General News

- ✓ **ABC News**
- ✓ **CNN**
- ✓ **NBC News**
- ✓ **CBS News**
- USA Today

Music

- Spotify
- Bandsintown
- Amplified
- ✓ **MTV Networks**
- Soundcloud
- Yahoo! Music

Gaming

- EA Websites
- ✓ **GSN**
- Midas Player
- FreeRide Games
- Wild Tangent

Home

- Wayfair
- About.com Home
- HOUZZ.com
- Ehow Home & Garden
- ✓ **HGTV**

Weather

- ✓ **The Weather Channel**
- Weatherbug.com
- Accuweather.com
- MSN Weather
- Yahoo! Weather

TV Entertainment

- Yahoo! TV
- ✓ **NBCU TV**
- Tribune Broadcasting
- AOL On – Huff Post TV
- ✓ **TV Guide**

Food

- ✓ **Food Network**
- Allrecipes
- BlogHer Food
- My Recipes Network
- Yahoo! Food

Kids

- ✓ **Disney Entertainment**
- COOL-MATHGAMES.com
- ✓ **Nickelodeon Kids & Teens**
- PBSKIDS.org
- Poptropica Worldwide

Brands/Content

Attention Online

TV's content commitment
also drives top-ranked tablet apps.

From Over 1,000,000 Apps:

Sports

- ✓ Watch ESPN
- ✓ ScoreCenter for iPad
- NBA Gametime 2014-2015
- ✓ Bleacher Report Team Stream
- Hudl

Music

- Pandora
- Spotify
- Beats Music
- Soundcloud
- ✓ BET NOW

TV Networks

- ✓ The CW
- ✓ Lifetime
- ✓ Food Network
- ✓ History
- ✓ A&E Networks

News

- ✓ FOX News
- ✓ BBC News
- Flipboard: Social News Magazine
- ✓ NBC News
- Wall Street Journal

Comedy

- Pandora
- ✓ Comedy Central
- ✓ Ellen
- Vudu
- Viki

Weather

- ✓ Weather Channel for iPad
- Yahoo! Weather
- Weather+
- Weatherbug
- MyRadar Weather

Finance

- Yahoo! Finance
- Wall Street Journal
- ✓ CNBC
- ✓ CNN
- Forbes Magazine

TV Entertainment

- Shazaam
- Entertainment Weekly
- Yap TV
- ✓ Xfinity TV Go
- ✓ E! Live from the Red Carpet

Children

- TBN Mobile
- ✓ U-Verse Kids
- ✓ Yo Gabba Gabba
- ✓ Nickelodeon
- ✓ Watch Disney Channel

Business

- ✓ Bloomberg TV +
- ✓ CNBC
- ✓ BBC News
- Yahoo! Finance
- Time Magazine

Brands/Content

The Brand Illusion

Content fronted by a YouTube “brand” is actually an aggregation of thousands of (mostly UGC) channels.

Abbreviated Channel List By Network



FULLSCREEN



- Tobuscus (6M)
- Bart Baker (4M)
- Stampylonghead (4M)
- TheDiamondMinecart (4M)
- Bad Lip Reading (3M)
- Glozell Green (3M)
- Kassem G (2M)
- ERB (1M)

- Westfesttv (1M)
- HuskyStarcraft (889k)
- Katilette (667k)
- Gardea23 (624k)
- Polaris (619k)
- ItsMyRayeRaye (595k)
- EpicLloyd (475k)
- HeyKayli (422k)
- The Platform (379k)
- CharlieStylez (345k)
- Kandeeland (325k)
- The Mom's View (316k)
- DaveChaos (293k)
- Animonster (306k)
- MakerMusic (235k)
- Mary Doodles (231k)
- Bobbylee (145k)
- FriendlyPaw (138k)
- Caroonium (100k)
- Maker Gen (100k)
- SanctionedTV (14k)
- David Barbara (5k)
- The Daily Connoisseur (18k)
- Emily Valentine (1K)
- Emily Hughes (436)

**Plus 1,000+
More Channels**

- TheFineBros (10M)
- fouseyTube (4M)
- Shane (4M)
- megannicolesite (2M)
- TiffanyAlvord (2M)
- our2ndlife (2M)
- Tyler Ward Music (1M)

- WHATTHEBUCKSHOW (1M)
- DavidSoComedy (947k)
- TantrumJas (877k)
- Avbyte (752k)
- Casey Holmes (747k)
- COOP3RDUMM3R (503k)
- Jefferson Bethke (490k)
- AverageBroTV (487k)
- Chrissy Costanza (395k)
- 5secondfilms (385k)
- Rachel Ballinger (357k)
- RAJIV DHALL (356k)
- Matt Stonie (337k)
- FrankieJGrande (312k)
- Brittani (278k)
- Lycia Faith (154k)
- Molo Nation (102k)
- AndrewQuo (80k)
- Siennaspaldingt (69k)
- Digital Tour Bus (33k)
- Glitterglam95 (25k)
- Erik Shaw (15k)
- Soulection (10k)
- Collegefession (6k)
- Derrion Tolanski (6k)
- FullscreenCommunity (1K)

**Plus 5,000+
More Channels**

- RayWilliamJohnson (10M)
- Rooster Teeth (7M)
- machinimarespawn(2M)
- MachinimaRealm (2M)
- Dane Boe (1M)
- Happyhour (1M)
- Nerdist (1M)
- Tiesto (1M)

- deadmau5 (807k)
- Inside Gaming (630k)
- xSGTxSMURFx (590)
- PressHeartToContinue (522k)
- Machinima ETC (412k)
- Samandniko (336k)
- Black Nerd Comedy (321k)
- ThatGuyWhoCamps (314k)
- MachinimaVS (227k)
- MachinimaLatino (180k)
- ItsJustSomeRandomGuy(176k)
- AndrewQuo (80k)
- RCSuperPowers (70k)
- Team Respawn (66k)
- Ken Burton (48k)
- xCaliGrrlx (11k)
- Danstreet123 (7k)
- Ash Sowsby (6k)
- LenzyDaGreat (5k)
- Radnerdtv (4k)
- JustinIsAProdigy (3k)
- ApoKHD(798)
- ting6345 (733)
- Energizer (354)
- NothingtodowithCats (111)

**Plus 250+
More Channels**

- Rooster Teeth (7M)
- Simons's Cat (3M)
- Dane Boe (1M)
- DotaCinema (1M)
- Element Animation (1M)
- Improv Everywhere (1M)
- VintageBeef (1M)
- xRpMx13 (1M)

- Na'Vi.Dota 2 (914k)
- JumpinthePack (797k)
- PauseUnpause (641k)
- GuudeBoulderfist (464k)
- TheDevildogGamer (435k)
- OK Go (414k)
- TGN (395k)
- First Person Troller (384k)
- Team Epiphany (342k)
- TheMinecraftHippie (326k)
- OMGitsfirefoxx (294k)
- Sparkles – CSGO&more (286k)
- AgentXPQ (276k)
- BajiheeraWoW (235k)
- stonewall008 (187k)
- NukemDukem (169k)
- HaloFollwer(167k)
- Golden GS (134k)
- TCTNGaming (122k)
- The Solar Gamer (86k)
- OneCheesyMofo (81k)
- Cutewithchris (33k)
- EmpowerYourBody (24k)
- Blackdogfilms (1k)
- The DanseSociety (30)

**Plus 6,000+
More Channels**

- RocketJump (7M)
- Epic Meal Time (6M)
- Annoying Orange (4M)
- Cinema Sins (3M)
- CorridorDigital (3M)
- HouseholdHacker (2M)
- Wassabi Productions (2M)
- JustKiddingFilms(1M)

- Lindsey Hughes (980k)
- Node(976k)
- HollywireTV (879k)
- Rob Dyke (758k)
- iSekC (751k)
- Alexa Losey (474k)
- BaratsAndBereta (417k)
- Beatdownboogie (393k)
- Pogo (380k)
- Goldiestarling (371k)
- Andrewmfilms (328k)
- Bart Kwan (302k)
- Inside the Magic (284k)
- Yourhart0 (283k)
- Gina Morano (263k)
- BloodBlitz (208k)
- The Axis of Awesome (206k)
- RUNAGROUND (179k)
- Jhaller (153k)
- LazyPillow (135k)
- Belated Media (118k)
- TVNweather (112k)
- Lena Danya (101k)
- Alligator Tub (94k)
- Film4 (70)

**Plus 650+
More Channels**

- UltraMusic (2M)
- Colinfurze (709k)
- Unicoos (349k)
- Musical Freedom (252k)
- What's Trending (151k)
- Ashley Mardell (106k)
- PM Recordings(40k)
- Video Creators (31k)
- Justkissmyfrog (20k)
- SshakeTV (9k)
- Flyotw Film(8k)
- JimbleJam (7k)
- Alexxparkour (6k)
- Jaguar Skills Videos (6k)
- Matthias Mayer (6k)
- Nikki Yanofsky (6k)
- Funk Stylers TV (5k)
- Flair20TV (4k)
- Mick Woods (4k)
- NextTime onLonny (4k)
- N1Project (3k)
- ILLUVLIVE (2k)
- Leoleove (2k)
- OfficiallyEricJoel (1k)
- Sarah Grimstone (1k)
- NFOX MUA (885)
- BairesFamilyMedia (880)
- Tiny Bag Productions (414)
- CHOKOHAYS (397)
- FourFourTwoUK (394)
- fdsmusiclabel(91)
- Empire Divide (77)
- Cristian Jermane (66)

**Plus 1,500+
More Channels**

Infinite Attention-Splitting

The top 20 YouTube “networks” are actually 37,200+ channels/sites, with mostly UGC.

Top 20 comScore Measured YouTube Networks
Unique Visitors (P13+) - Sept'14

Channel	Primary Genre	Total Unique Viewers (000)	Standalone / Multichannel?	# of Channels
VEVO @ YouTube	Music	40,909	Multichannel	500+
Maker Studios @ YouTube	Entertainment	40,208	Multichannel	1,000+
Fullscreen @ YouTube	Video Curation	36,144	Multichannel	5,000+
Warner Music @ YouTube	Music	23,220	Multichannel	100+
Machinima @ YouTube	Gaming	20,239	Multichannel	275+
ZEFR @ YouTube	Video Curation	19,629	Multichannel	150+
BroadbandTV @ YouTube	Video Curation	17,864	Multichannel	6,000+
The Orchard @ YouTube	Music	16,870	Multichannel	1,000+
Jukin Media @ YouTube	Video Curation	15,725	Multichannel	30+
Collective @ YouTube	Entertainment	14,326	Multichannel	690+
Zoomin.TV @ YouTube	Games / News	14,174	Multichannel	50+
any.TV @ YouTube	Entertainment	13,802	Multichannel	50+
QuizGroup @ YouTube	Video Curation	12,795	Multichannel	15,000+
UMG @ YouTube	Music	11,434	Multichannel	N/A
SonyBMG @ YouTube	Music	11,228	Multichannel	N/A
Base79 @ YouTube	Sports	10,261	Multichannel	1,500+
Rightster @ YouTube	Entertainment	9,976	Multichannel	800+
Defy Media @ YouTube	Video Curation	9,081		25+
FremantleMedia @ YouTube	Entertainment	8,702	Multichannel	135+
Style Haul, Inc. @ YouTube	Fashion	7,366	Multichannel	4,900+

The Top 20 Networks average over **2,000 channels**



WHY?

Get Real: Video Advertising 2015

Advertisers need to refocus attention.

For advertisers, the great opportunity in video is to meet consumers where they dedicate their attention.

That starts with understanding the real attention power of the main vehicles.

The reality is that consumers commit the overwhelming majority of their video attention to multiscreen TV.

AdTech video can be a brilliant extension of a multiscreen TV plan and campaign. But it is not a substitute, surrogate or replacement for the massive attention that multiscreen TV attracts.