



# CABLE NATION: Young Adult TV Usage – Myth vs Reality

# There Has Been Much Written In the Press About Young Adults Deserting TV for Alternate Devices. Young Adults Are Consuming More Media Than Ever Before Across All Platforms, Including Television.

- Video consumption continues to be additive as time spent with the TV is up 2% among A18-24.
- Television's share of total video time has increased to 88% - up from 84% year ago.
- TV viewing levels are flat when factor out Broadband Only homes (which were introduced into sample this Fall of 2014).
- Young women turn to Television for latest news and information; TV ads rank top for providing information on new products & services; TV ads are most memorable – moving products off the shelves.
- Time spent on the internet and watching video on computer is down 18% and 13%, respectively among A18-24 – a trend we have noticed quarter after quarter.
  - When A18-24 are online, Cable sites are top across most genres.
- Young women will continue to drive the labor force, in effect influencing their media viewing habits; timeshifting grows from 12% to 16% among working women 18-24.
- Young women are active social media users; 65% discussing what happened in show via social media while watching.

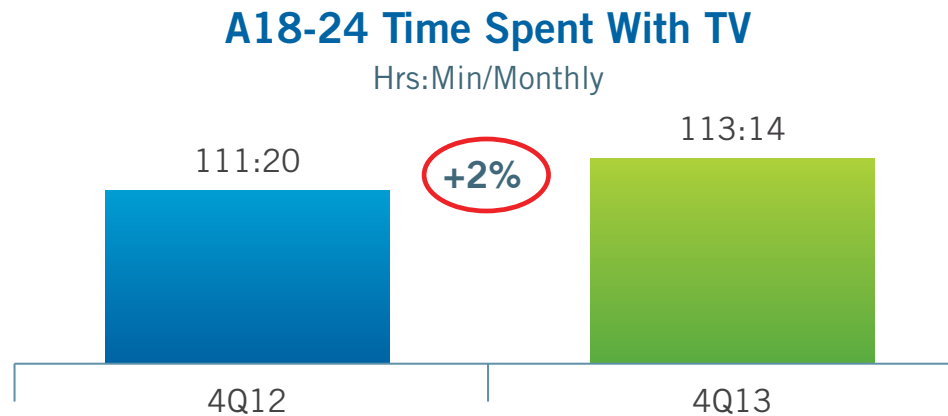


# Myth... Young Adults Are Deserting Television



## Reality... Video Consumption is Additive, Not a Replacement Phenomenon

Time Spent With The Television Continues To Increase Among Young Adults



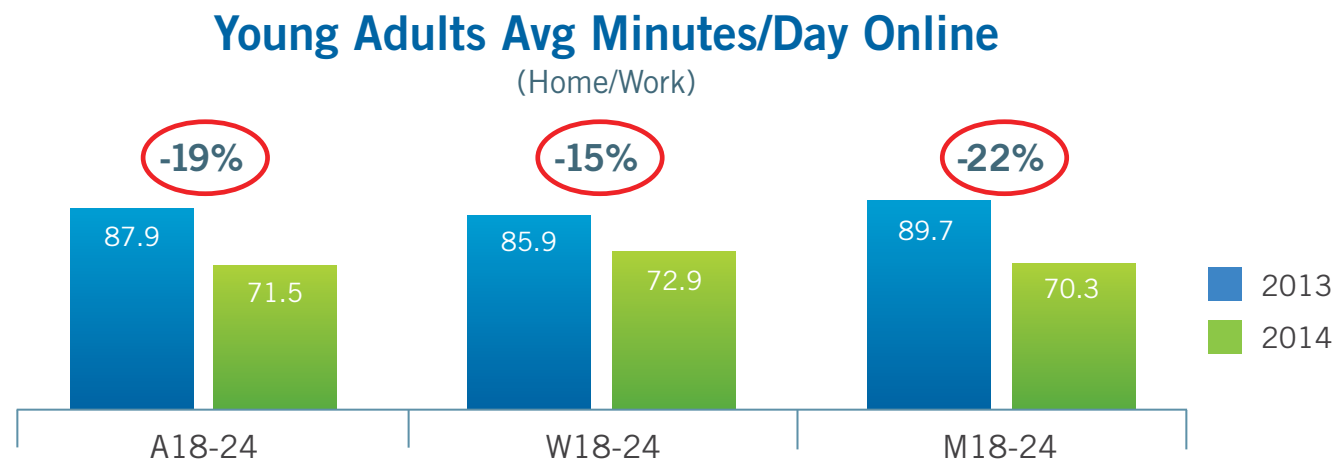
Source: Nielsen Cross Platform Report; A18-24

# Time Spent Viewing Video On Phone Is Up But Time On Computer Continues To Decline – A Trend We Have Observed Quarter After Quarter

## A18-24 Monthly Time Spent in Hours: Minutes

	4Q12	4Q13	% Diff
Traditional TV	111:20	113:14	+2%
Using Game Console	14:31	18:19	+27%
<b>Using Comp. Internet</b>	<b>35:49</b>	<b>29:24</b>	<b>-18%</b>
<b>Watching Video On Comp</b>	<b>15:08</b>	<b>13:14</b>	<b>-13%</b>
Watching Video On Phone*	5:53	6:29	+14%

In Fact, Time Spent Online Is Driven By Declines Among Both Young Men and Women



# Online, Cable Content Is Top Across Most Genres

## Top 5 Websites by Genre – A18-24

Sports	Comedy	General News	Music	Kids
<ul style="list-style-type: none"> <li>✓ ESPN</li> <li>✓ Bleacher Report</li> <li>✓ NBC Sports Network</li> <li>USA Today</li> <li>✓ FOX Sports on MSN</li> </ul>	<ul style="list-style-type: none"> <li>College Humor/Cracked</li> <li>✓ Comedy Central</li> <li>✓ Adult Swim</li> <li>Cheezburger</li> <li>TotalSororityMove.com</li> </ul>	<ul style="list-style-type: none"> <li>✓ CNN</li> <li>Yahoo!</li> <li>BuzzFeed</li> <li>NBC News</li> <li>USA Today</li> </ul>	<ul style="list-style-type: none"> <li>✓ MTV</li> <li>Spotify</li> <li>ToneMedia</li> <li>Soundcloud</li> <li>ComplexMusic</li> </ul>	<ul style="list-style-type: none"> <li>✓ Disney Entertainment</li> <li>✓ Nickelodeon Kids &amp;Teens</li> <li>CoolMath-Games.com</li> <li>TotallyHer - Kids</li> <li>Poptropica</li> </ul>
Home	Weather	TV Entertainment	Food	Gaming
<ul style="list-style-type: none"> <li>eHow Home &amp; Garden</li> <li>ApartmentTherapy.com</li> <li>Houzz.com</li> <li>Hearst Home Design</li> <li>✓ HGTV</li> </ul>	<ul style="list-style-type: none"> <li>✓ The Weather Channel</li> <li>Weatherbug</li> <li>Accuweather</li> <li>MSN Weather</li> <li>Yahoo! Weather</li> </ul>	<ul style="list-style-type: none"> <li>✓ NBCU TV</li> <li>✓ TV Guide</li> <li>✓ A+E Network</li> <li>PBS.ORG</li> <li>✓ Discovery Networks</li> </ul>	<ul style="list-style-type: none"> <li>All Recipes</li> <li>BlogHer Food</li> <li>✓ Food Network</li> <li>Foodie by Glam</li> <li>My Recipes Network</li> </ul>	<ul style="list-style-type: none"> <li>EA Websites</li> <li>✓ GSN</li> <li>FreeRide Games</li> <li>Wild Tangent Media</li> <li>Zynga</li> </ul>

✓ = Ad-supported cable brand

# Among Young Women, Cable Sites Rank Toward The Top

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# Overall, Television's Share Of Total Video Viewing Continues To Grow, Up 4 Points From Last Year

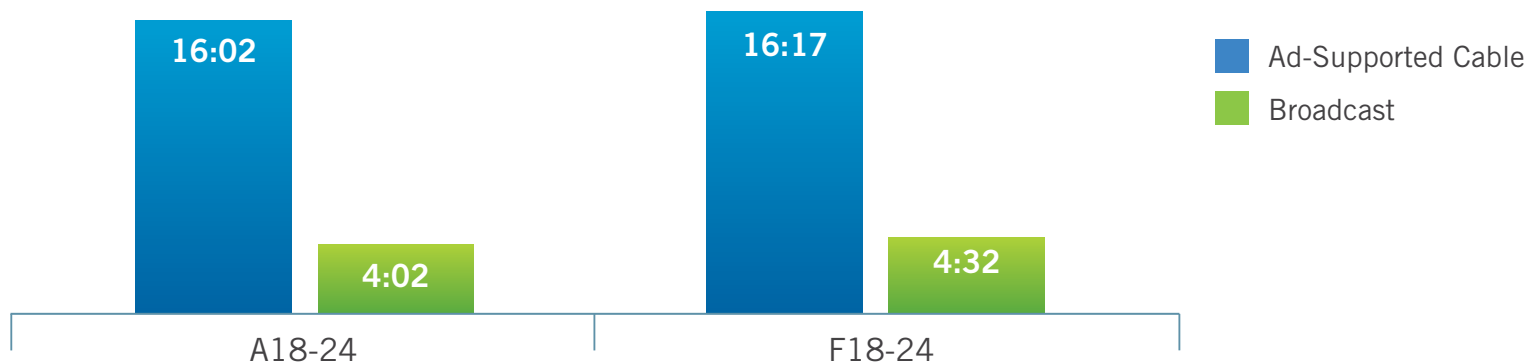


## A18-24 Time Spent Monthly (Hrs:Min)

	4Q12	4Q13
Total Video Viewing (incl. video on comp/Phone)	133:04	128:43
TV Viewing	111:20	113:14
<b>TV's Share Of Total Video Viewing</b>	<b>84%</b>	<b>88%</b>

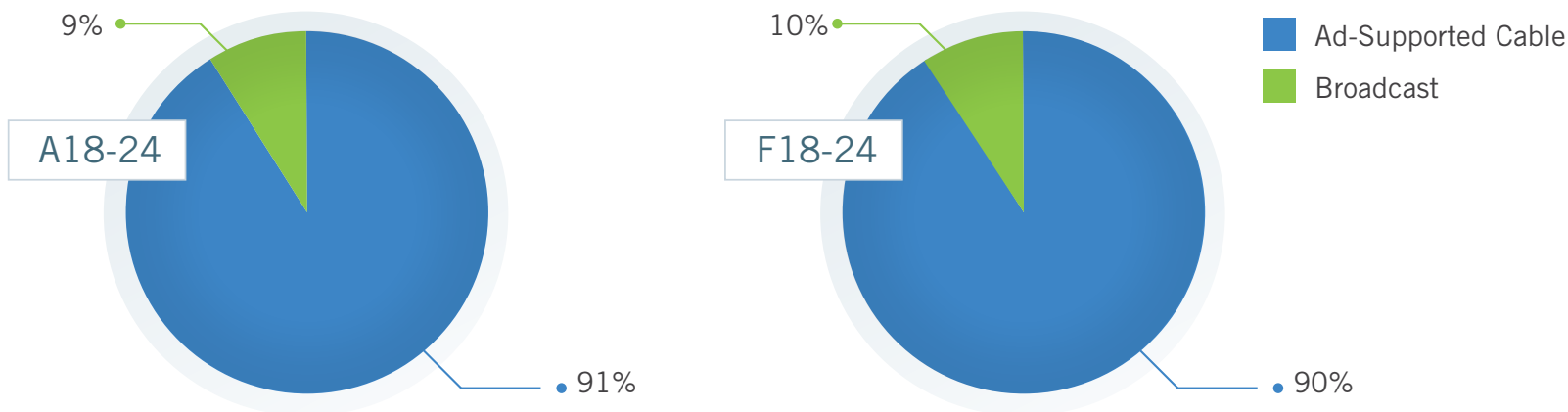
# Young Adults Spend 4X More Time With Cable

Time Spent Weekly (Hrs:Min) – Total Day



# Ad-Supported Cable Garner Majority Of Available TV GRPs

Sellable GRPs In Avg Week/Total Day



Source: Nielsen Pgm level analysis; total day April '14

# Myth...TV Viewing Levels Are Declining At A Record Pace – Especially Among A18-24

Reality... TV Viewing Levels Are Flat When Factor Out Broadband Only Homes, Which Were Introduced Into The Sample This Past Fall

## Total Day Persons Using TV % STD 13/14 v YAG

	w/Broadband HH	without Broadband HH
P2+	-1%	+1%
P18-24	-3%	0%
W18-24	-4%	-2%
M18-24	-2%	+3%
P18-49	-3%	-1%
P25-54	-3%	-1%
P18-34	-4%	-1%
P25-34	-4%	-1%

When factor out Broadband Only, picture becomes clearer:

- TV is flat among A18-24
- Down slightly among women aged 18-24 (-2%)
- Up among young men (+3%)

# In Primetime, TV's Viewing Levels Are Up Slightly From Last Year Among A18-24

## Primetime Persons Using TV % STD 13/14 v YAG

	w/Broadband HH	without Broadband HH
P2+	-2%	0%
P18-24	-2%	+1%
W18-24	-3%	-1%
M18-24	-2%	+3%
P18-49	-4%	-2%
P25-54	-4%	-2%
P18-34	-4%	-1%
P25-34	-6%	-3%

TV Viewing Levels

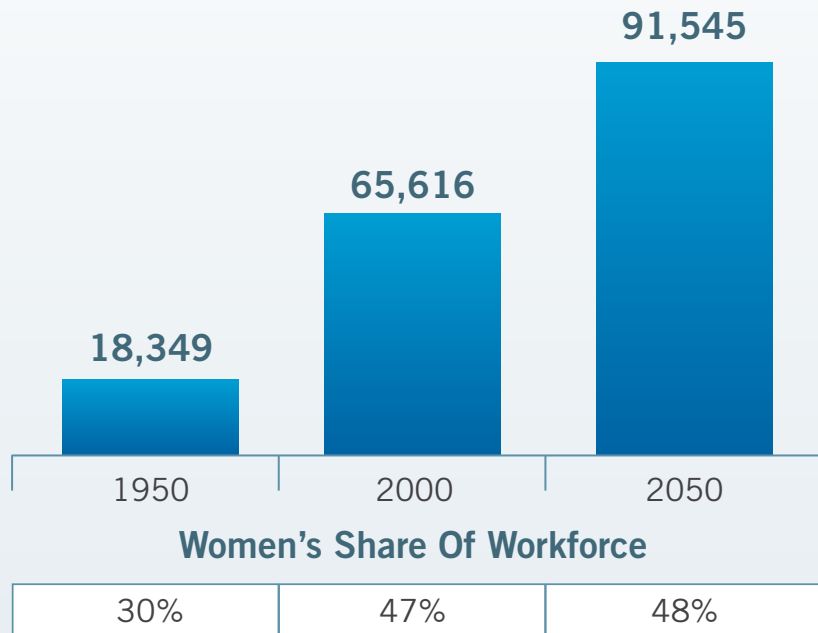


# Myth... Working Women Are Tuning Out Of Television

## Reality... Large Increases Of Women Entering Workforce Has Influenced Their Media Viewing Habits But They Still Schedule TV 'Me Time' At Their Convenience

**Number of Women Who Entered Workforce Has More Than Tripled In Past 50 Years With A Projected 92M by 2050**

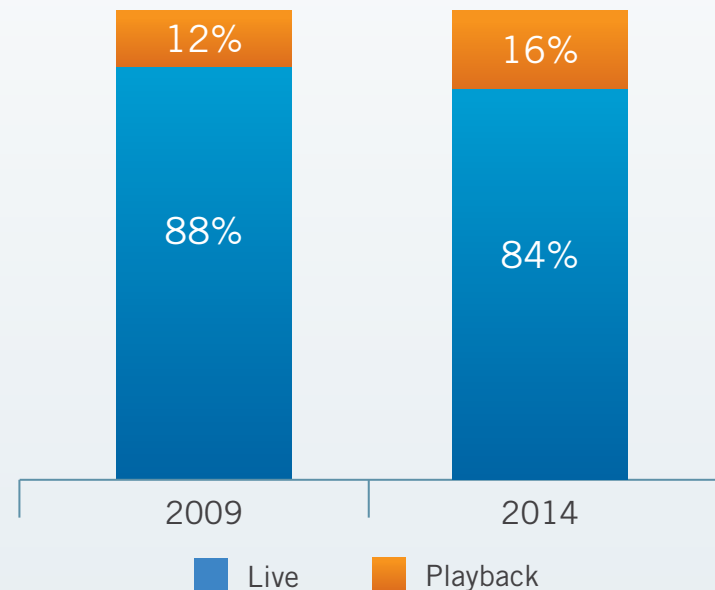
Women In Labor Force (000)



Source: Census; W16+

**With More & More Women In The Work Force, These Time Pressed Consumers Are Timeshifting Their Programming To Stay Relevant**

Working Women 18-24 Playback v Live Minutes



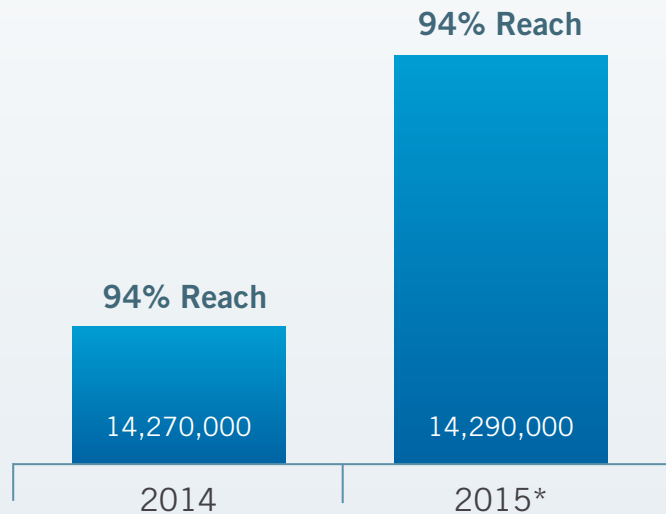
Nielsen NPower, timeperiod data, April of each year, base=DVR HH

# Myth...Young Women Are Deserting Television; Not Optimal Medium For Reaching This Elusive Target

## Reality...Young Women Are Big Consumers Of Television

### Television Reaches Over 90% Of Young Women

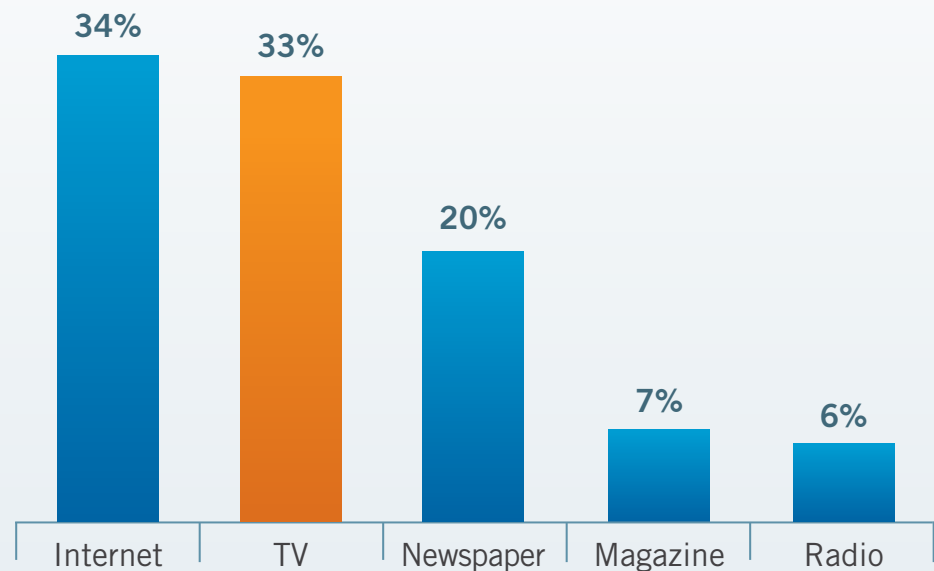
W-18-24 TV UE & Reach %



Source: Nielsen UE; \*Advance UE

### Young Women Turn To Television For Latest News & Information

Media Trusted Most Among W18-24

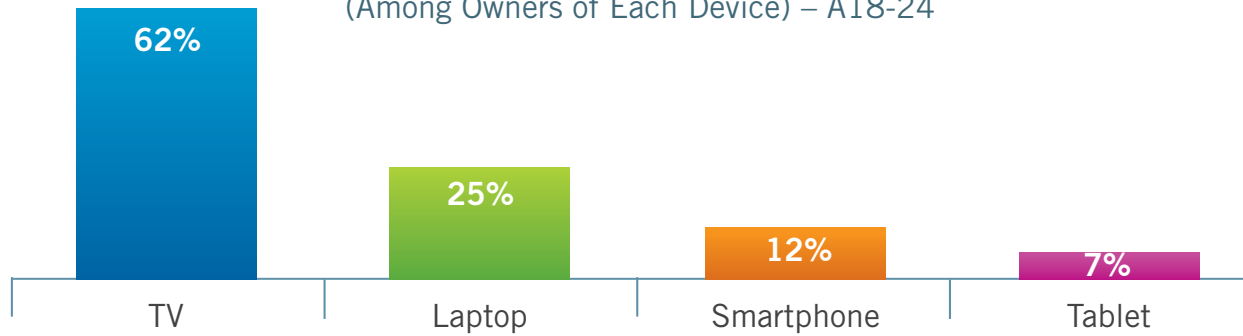


Source: MRI 2013 Doublebase; vert %; heavy media users (heavy tv/online)

# Television Ads Are Most Memorable; Move Products Off The Shelves

## “Device On Which Advertising Is Most Memorable”

(Among Owners of Each Device) – A18-24

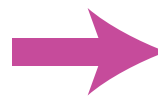


## Television Ads Encourage Further Investigation and Ultimately Move Products Off the Shelves

A18-24

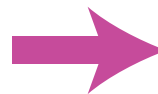
How Often?

**78%**  
Look up information online about an advertisement currently watching



**72%**  
Once a week or more

**65%**  
Shop online or purchase something they have seen on a show / advertisement they are currently watching



**60%**  
Once a week or more

BASE: Watches video on device

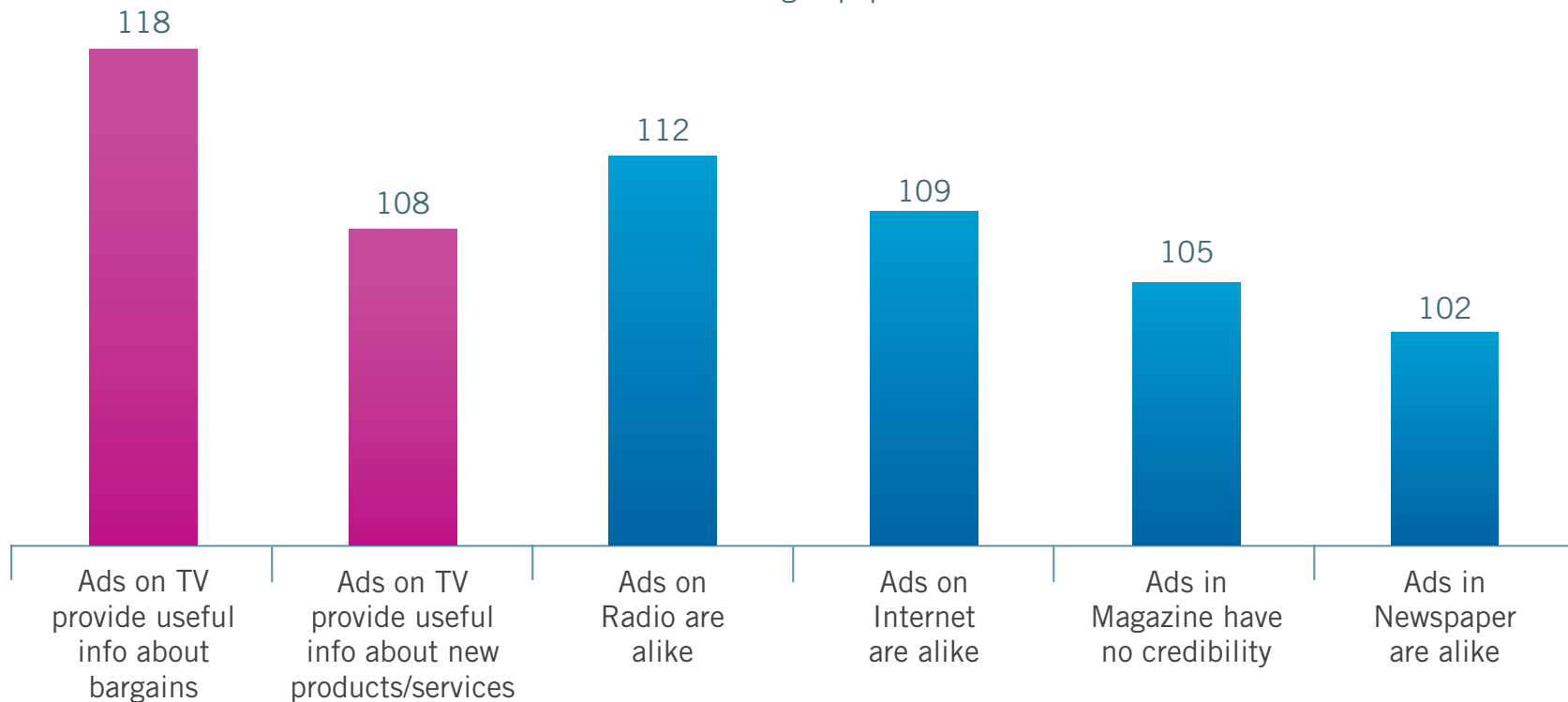
1056 On which of the following devices do you find advertisements most memorable?

600 How often do you do each of the following while watching television? Please think about these activities as directly related to the show or an advertisement you are watching.

# Among Women, TV Ads Are Top For Providing Information About New Products & Services

## Interest In Advertising Among W18–24

(Index to gen pop)



Source: MRI 2013 Doublebase; index to gen pop

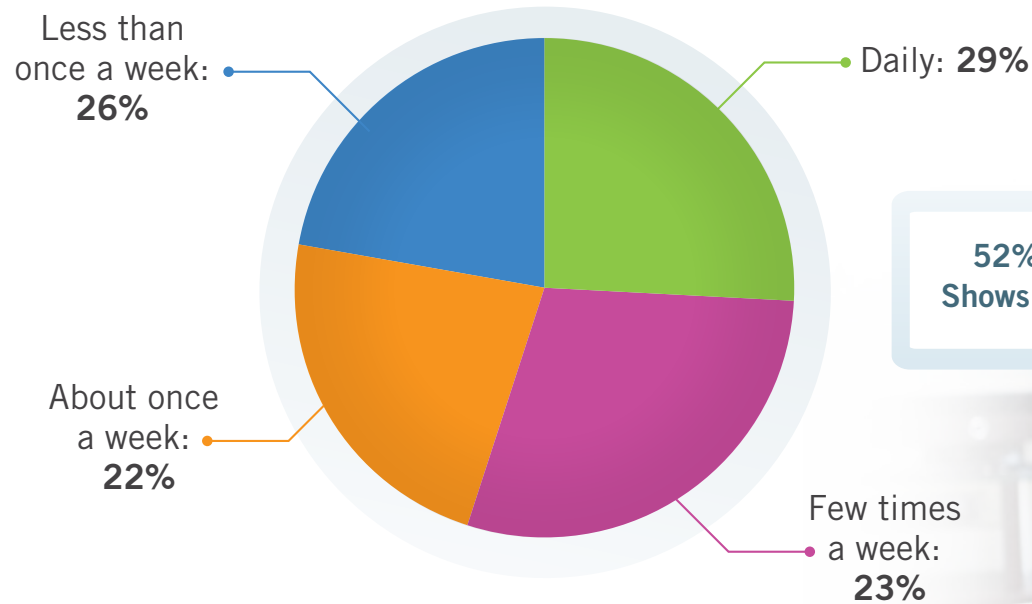
# Myth...Young Adults Are Consumed By Social Media; Do not Pay Attention To Television Advertising

## Reality...Social Media Engages Consumers, Holding Young Adults In The Room

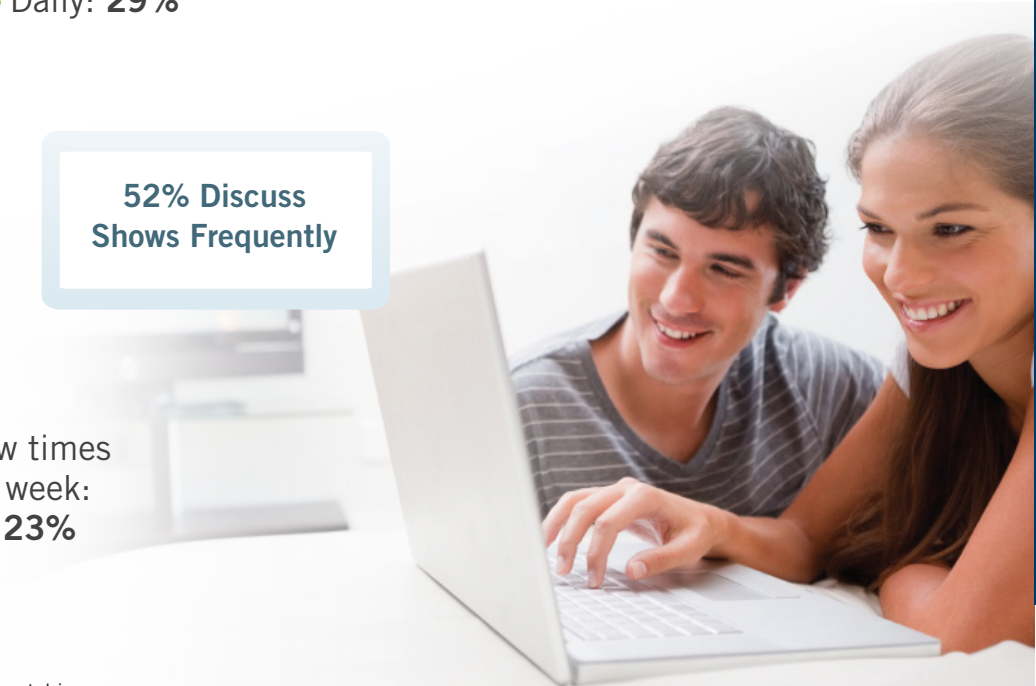
Young Adults “Chat” About TV Frequently...5 out of 10 Discuss Shows A Few Times a Week or More

### How Often Do you Chat / Post / Tweet About a Show While Watching TV?

(A18-24)

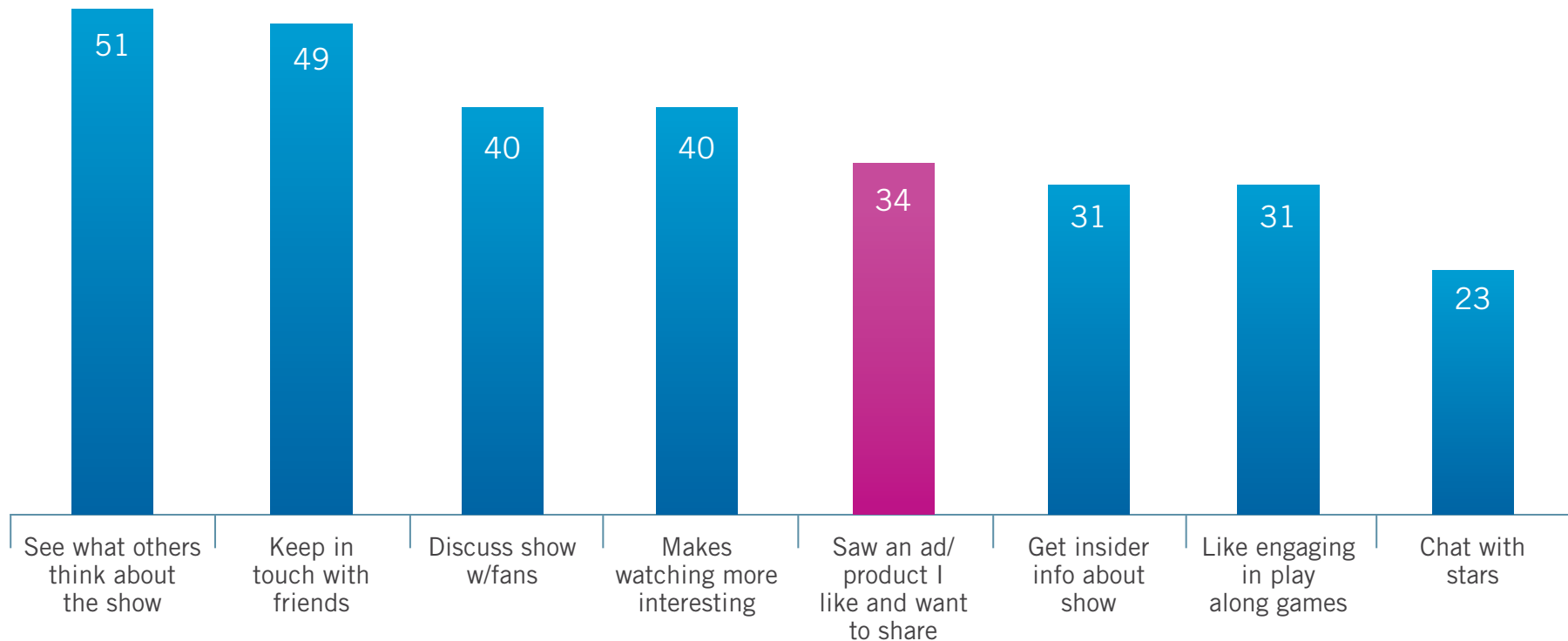


BASE: Respondents who engage in Social TV  
600 How often do you do each of the following while watching television?  
Please think about these activities as directly related to the show or an advertisement you are watching.



# Social Media Drives TV Viewing...Allowing For Further Engagement; 34% Saw An Ad Product They Want To Share

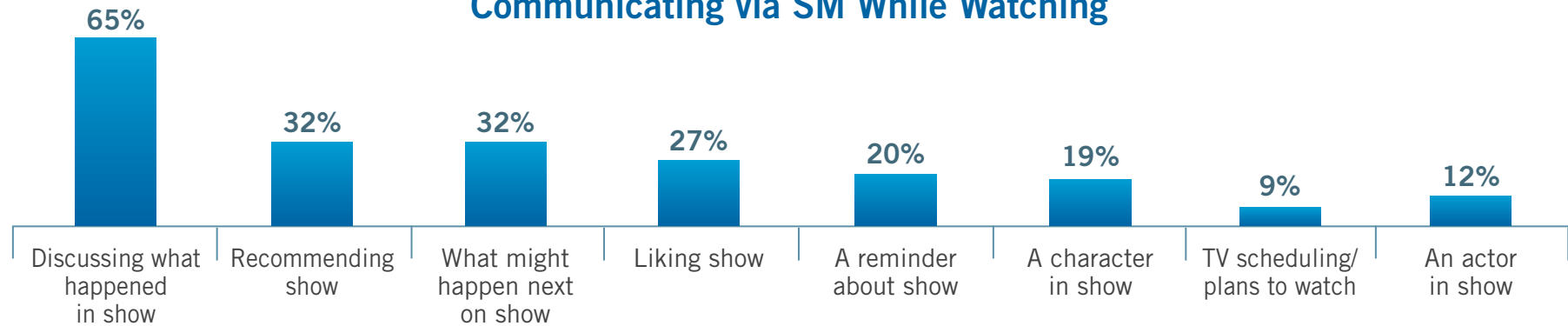
Why Do You Post / Tweet / Chat During a TV Show? (%)  
A18-24



BASE: Respondents who engage in social TV  
610 Previously you indicated you do the above. Why do you do these activities? Select all that apply.

# Young Women Are Active Social Media Users; Utilizing TV Content Within Conversation To a Staggering Degree

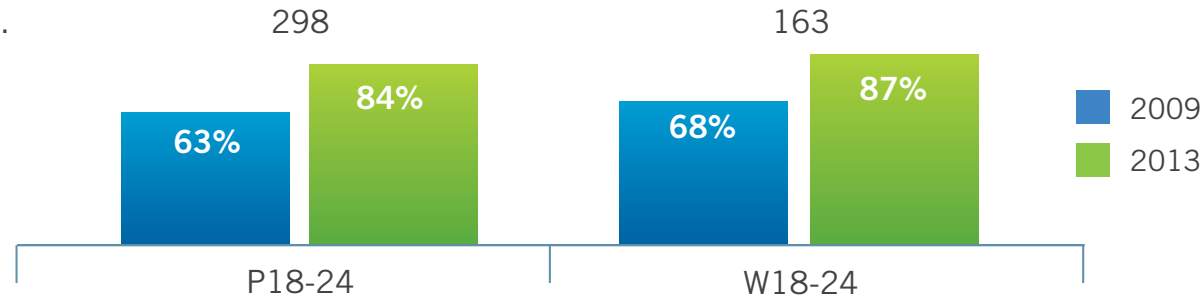
Women: Topic of Conversation About Show When Communicating via SM While Watching



# Social Media Usage Increases, Over-indexing General Population Significantly

Visited Social Network Site/Past Month

Index to General Pop.



Source: top chart-CRE Talking Social TV; social media trends= MRI Doublebase; social media includes Facebook and Myspace



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# 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:

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