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What the Industry Reads First

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Measuring Multiplatform: Nielsen on Data Insights from TCR

There is significant audience lift for network programs after adding in viewership from DVR and VOD—ranging from 4% to 58% among P18-49, dependent on the program genre, according to Nielsen data presented to press at an upfront breakfast in NYC Tues. The company detailed data insights from its cross-platform measurement product known as Total Content Ratings (TCR), which provides a single metric for linear and digital platforms. “We know that viewing grows after Live+7—that’s the whole point of Total Content Ratings. And we know people are getting to content through different vectors—that’s the other purpose,” audience insights SVP *Glenn Enoch* told **Cablefax**. “What we see is that there’s a range—different shows have different amounts of growth.” Looking at a mix of cable and broadcast shows from different genres, ranging from reality competition to episodic drama to animated comedy, data shows that both the amount of audience lift over time and the method of viewing—DVR, VOD or on digital devices—vary. For instance, both reality competition series and serial dramas, which require viewers to see one episode before the next airs, show little lift after the first week. Viewers of these programs tend to watch them live or through DVR. Meanwhile, episodic dramas, sitcoms and animated comedy experience progressively greater lift, the majority of which comes from VOD and digital viewing. The greater the audience lift, the greater the VOD contribution. “The shows that are getting audience even after day 35 tend to be the ones that grow the most. They tend to be getting that more from VOD, because DVR contribution tends to fade over time, but VOD will just keep growing,” Enoch said. On average, 7% of DVR playback occurs after day 7. Nielsen also had insights on digital data that it has been collecting since January—but given the short timeframe it’s a small data set. Still, February data show that digital viewing adds 2-4% exclusive reach, according to Enoch. “We expect that it’s going to add a lot more exclusive audience—people only watching on digital as well as increased average audience over a longer period of time, once we have that many weeks in our data set,” he said. So when exactly will TCR be ready for the industry’s use? Addressing the implication that the product rollout has been delayed, product leadership svp *Kelly Abcarian* said the company’s using a “rolling syndication approach” specifically to serve the needs of the clients. “There isn’t any technology that’s being worked on,” she said. That part is ready to go. But clients have asked Nielsen to be sensitive to the upfront season. Companies using the proprietary data provided by Nielsen will be able compare data sets in Q3, and a “new measurement standard” will be set for the 2017

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season, execs said. Assuming market adoption occurs, how will programmers apply the data? Abcarian expects clients will use it to find new methods of monetization, such as experiments with windowing strategies. Moreover, VOD and digital viewing tend to attract younger audiences, so there's potential to target those viewers through on demand platforms.

Frontier 1Q: While **Frontier's** integration of **Verizon's** wireline assets in CA, FL and TX is going well, the integration is expected to impact its 2Q results, pres/CEO **Daniel McCarthy** said during the company's earnings call Tues. "As far as the integration plans, we minimize marketing efforts to allow our teams to gain proficiency and utilization of the Frontier systems to operate the business. This will impact the gross additions in these new operations. This was planned and necessary to ensure we were capable of meeting higher activity level. As a result, we anticipate that the customer metrics for the second quarter will most likely be negative, as we begin to build our marketing campaigns over the coming weeks," the exec said. For the quarter, Frontier posted a net loss of \$186mln, compared to a net loss of \$103mln in 4Q, 2015. 1Q financial results included acquisition related expenses of \$188mln and acquisition and integration costs of \$138mln. The company lost 10,300 video subs, up from the 5,800 customer net loss from the previous quarter. It ended 1Q with 543,400 video subs. Frontier added 24,600 new broadband subs, down sequentially from the 28,500 net additions in 4Q. McCarthy is bullish on the company's video future. "We are at the beginning of a multiyear program to offer video service to an increasing portion of our footprint. We can service slightly more than 30% of our 14.5 million household footprint with video today, and we anticipate that will grow to well in excess of half over the coming year. We believe that the expanded reach of our video capability will help us attract new customers to Frontier for both video and broadband service," he said. In addition, Frontier will continue to expand its business services, particularly in the newly acquired CA, TX and FL markets.

April Ratings: **TBS** was the top cable net in prime for the month of April (3/28-4/24), averaging 2.02mln viewers, according to **Nielsen**. It was followed by **Fox News** (1.9mln), **TNT** (1.7mln), **HGTV** (1.6mln) and **USA** (1.5mln). **Nick** took the crown in total day (1.2mln), followed closely by **Fox News** (1.1mln). The season finale of **AMC's** "The Walking Dead" was the #1 show for the month (19.4mln viewers in L+7), followed by **TBS' NCAA** championship game (14.1mln viewers). **Brag Book:** **Nat Geo** had its most-watched month ever in network history last month, averaging 684K total viewers (Live +3). It was helped by "The Story of God with Morgan Freeman," which is the 4th most-watched telecast of all time for the net (3.5mln total viewers in L+3). -- **Investigation Discovery** celebrated its best ever April prime delivery among P2+ (1mln viewers), HHs (858K), 25-54s (450K), and W25-54 (293K). The Season 7 premiere of "Disappeared" was the series' highest debut ever among P2+ (1.1mln) and HHs (886K). -- **HGTV** also had an April for the record books, with its 0.59 rating ranking as the net's highest-rated and most-watched April ever among prime viewers 25-54.

Weekly Numbers & NHL: **Fox News** topped the total day pyramid last week, averaging 1.2mln viewers. It took the #2 spot in prime with 2mln viewers, behind **TNT** with its **NBA** playoffs (2.6mln). **CNN** found something to crow about too, with the net #1 in prime among 25-54s (3mln total viewers). This is only the 3rd time CNN has won 3 consecutive weeks in the last 15 years. CNN's coverage of the White House Correspondents' Dinner also ranked #1 in total viewers and 25-54s. On the other hand, Fox News had 5 telecasts in the top 20 basic cable telecasts. -- The 1st round of the **NHL** Stanley Cup Playoffs across **NBC**, **NBCSN**, **USA** and **CNBC** averaged 696K viewers, down 2% vs 2015 (712K). There were 46 telecasts in Round 1, although NBC had one fewer than a year ago, which impacts the overall average. The cable average, however, is up 3% (503K across 39 games vs 486K last year).

Set-top Letter: While some House members may have heard suggestions that the content industry backs **FCC** chmn **Tom Wheeler's** set-top proposal, "there are substantial concerns on the part of the content industry, including television, film, and music, regarding the impact of the proposed rule on copyright protections, existing licensing agreements, and the rights of content creators," 3 Democrat congressmen said in a letter to other House members. The proposed rules will have far-reaching implications on the rights of creators to "control the fruits of their labors and how they are made available to consumers and the public," CA reps **Adam Schiff** and **Tony Cárdenas** wrote with Rep **Gene Green** from TX. The lawmakers listed 30 content creators' comments filed with the FCC expressing concerns over the proposal. The creators include the **Motion Picture Association of America**, **Recording Industry Association of America** and **SAG-AFTRA**.

Mediacom Earnings: **Mediacom** reported combined results for 1Q Tues, posting revenue of \$444.8mln, a 5.9% YOY increase. It ended the quarter with 2.3mln primary service units, up 2.9% YOY. Total customer relationships were 1.33mln at the end of March, a 2.8% YOY increase. The company lost 2K video customers during the period across its 2 operat-

