



Public Workshop on Competition in Television and Digital Advertising

May 3, 2019

*A Brief Look at Today's Local Spot Cable Ad
Industry*



Mark Lieberman,

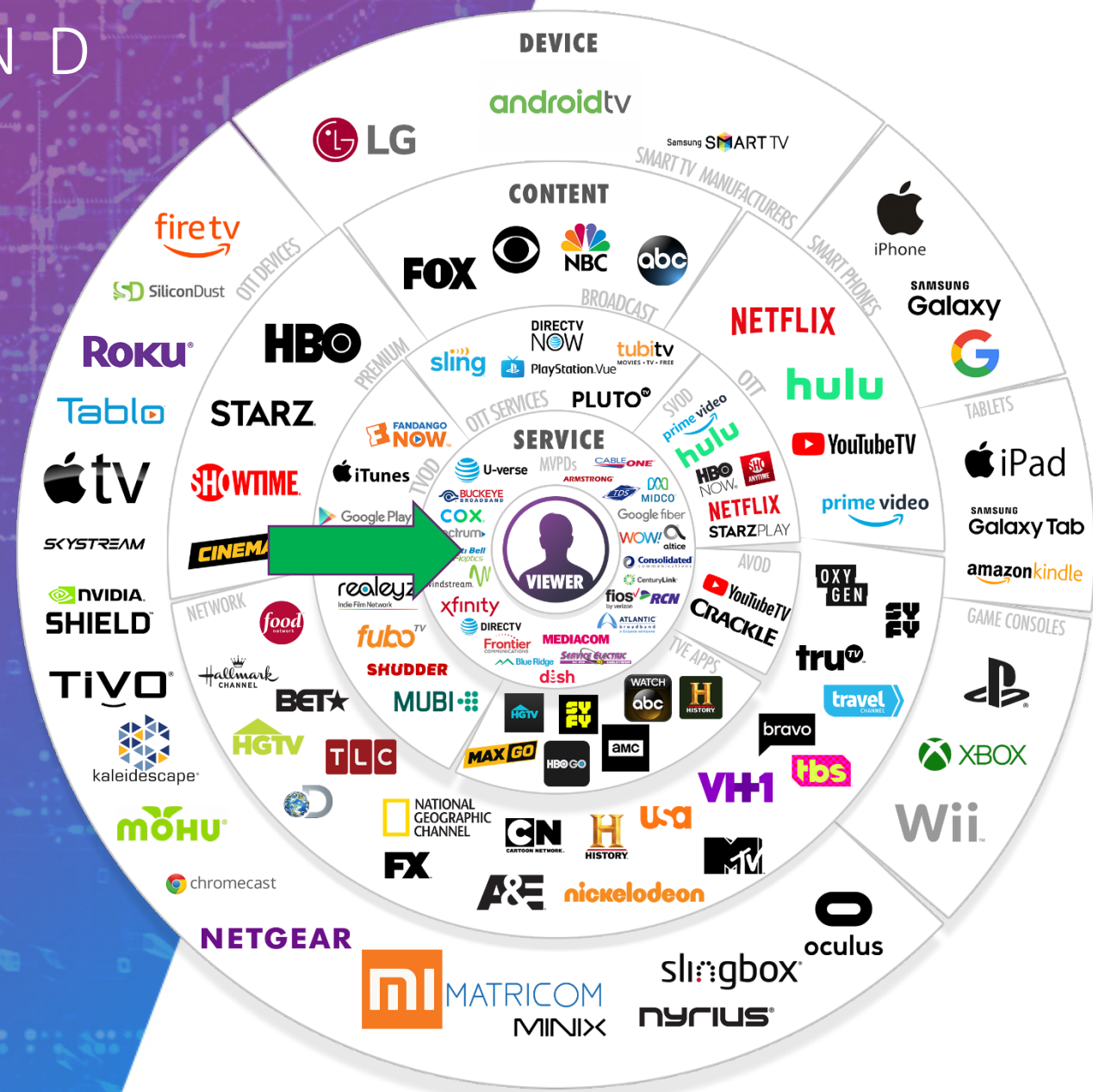
President/CEO

Viamedia



H Y P E R C H A N G E S A N D E X P L O S I O N O F C O N S U M E R C H O I C E

- TV Programming Renaissance
- Advertisers want Audience-based Data Driven approach to TV Buying
- TV ≠ Digital
 - Brand safety
 - Agencies
 - Adtech
 - Measurement
 - Privacy
- Digital Not Cannibalizing TV ad \$s
(Source: MoffettNathanson)



TV ADVERTISING IS FOUNDATIONAL AND BRAND SAFE

TOP BROADCAST TV PROGRAMS

RANK	PROGRAM	NETWORK	RATING	VIEWERS (000)
1	60 MINUTES	CBS	7.7	9,174
2	NCIS	CBS	7.5	8,952
3	CBS NCAA BSKBL CHMP FR 2	CBS	6.1	7,256

TOP CABLE TV AD-SUPPORTED PROGRAMS

RANK	PROGRAM	NETWORK	RATING	VIEWERS (000)
1	TBS NCAA BSKBL CHMP SA-2 (PURDUE VS VIRGINIA)	TBS NETWORK	5.9	7,103
2	TBS NCAA BSKBL-BRIDGE-SAT	TBS NETWORK	4.9	5,825
3	TBS NCAA BSKBL CHMP SA-1 (TEXAS TECH VS GONZAGA)	TBS NETWORK	4.5	5,358

Source: Nielsen, Week of March 25, 2019

Broadcast has 13 min./hr of nationwide ads; 1-2 regional min./hr

Cable has 16 min./hr of nationwide ads; 2-3 min. local/hr

SPOT CABLE ADVERTISING

- 2-3 minutes/hour
 - \$5.8 Billion
- Over 120,000 Local Advertising Merchants
 - Direct Consumer Relationships
 - Zone-Based

TOP 5 PLAYERS IN SPOT CABLE TV AD SALES


COMCAST
39 Million HH's

 Charter
25 Million HH's

 COX
5.4 Million HH's

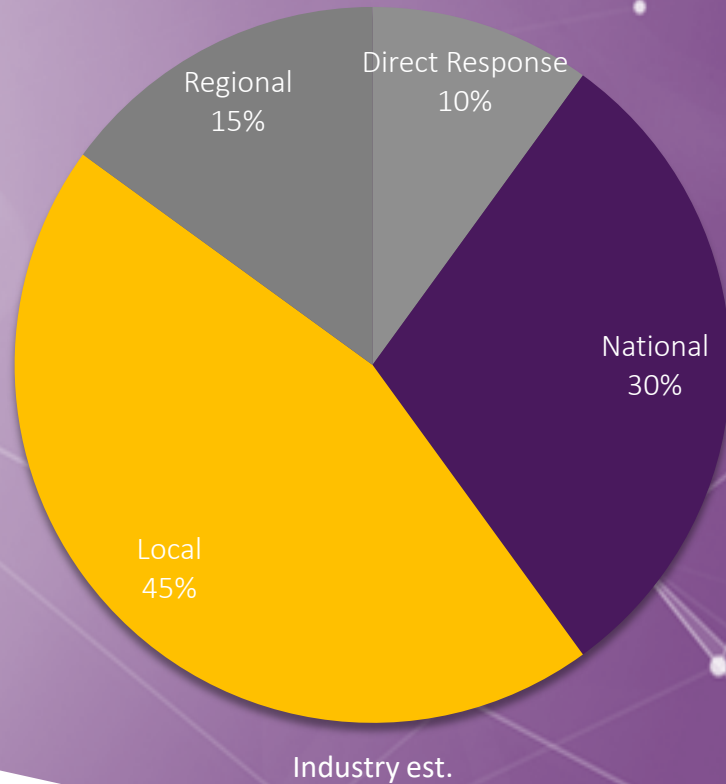
 altice
4.9 Million HH's

 viamedia
1.5 Million HH's

Note: Includes OO and 3rd Party Rep HHs (estimates)

SPOT CABLE TV AD ALLOCATION

Revenue by Line
All Networks – All Day



Pricing

- National: \$15-25 CPM
 - Regional: \$20-30 CPM
 - Local: \$20-30 CPM
 - Direct Response: \$3-5 CPM
- (Industry est.)

POLITICAL CABLE TV ADS

\$600M

Amount of **Local Political** Advertising Bought on Cable TV in 2014

Source: AdWeek

\$850M

Amount of **Local Political** Advertising Bought on Cable TV in 2016

Source: AdWeek

\$1.2B

Amount of **Local Political** Advertising Bought on Cable TV in 2018

Source: AdWeek

\$XXB

Amount of **Local Political** Advertising Bought on Cable TV in 2020

??



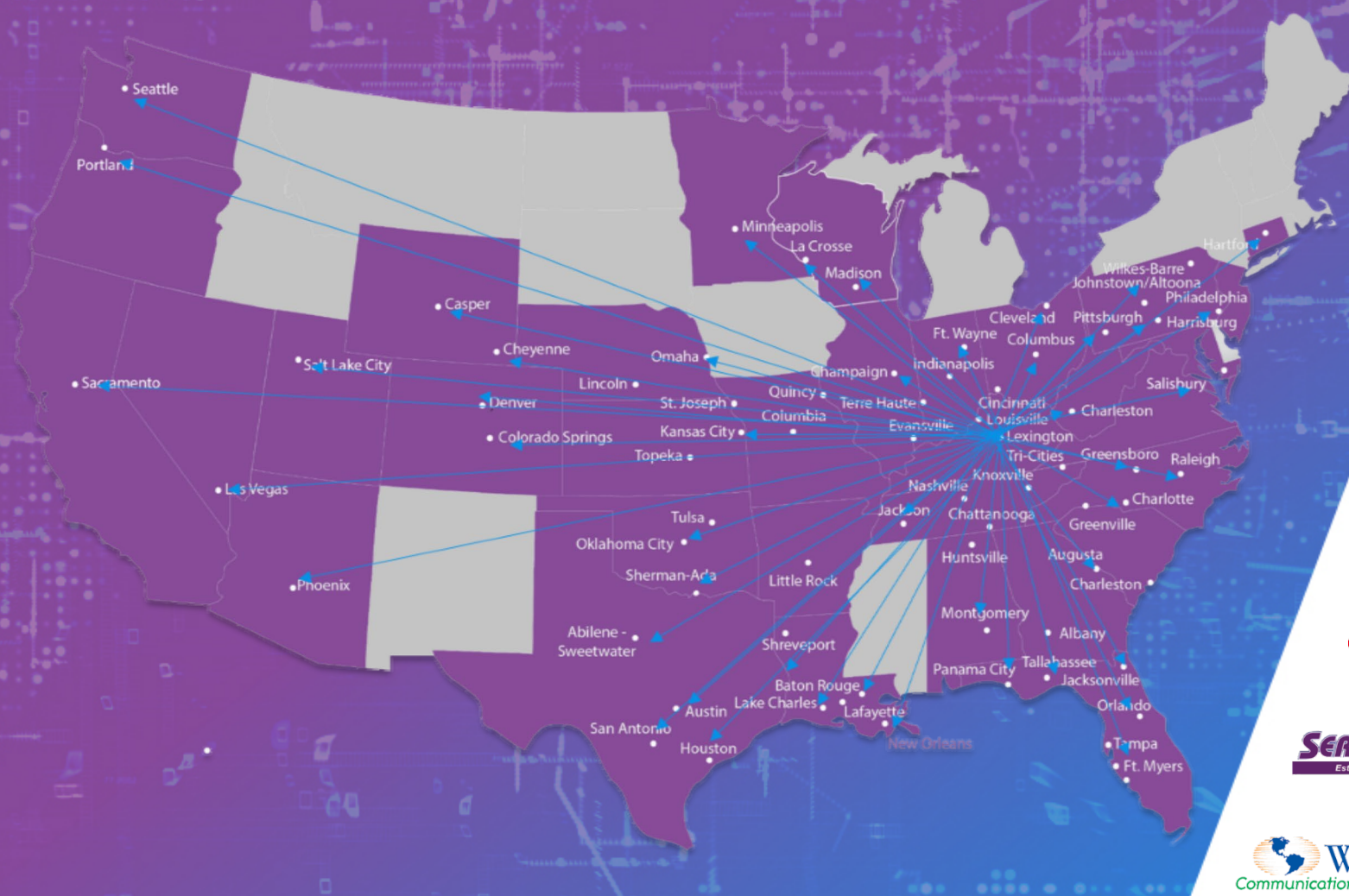
ABOUT VIAMEDIA

About Viamedia

Viamedia connects local advertisers with audiences through integrated cross-media strategies.

- Exclusive outsourced **cable TV ad sales** for **60+ operators**
- Deliver nearly **1 million cable TV commercials every day**
- State-of-the-art central **NOC, business intelligence** platform and adtech presence in over **140 locations in the US**
- Sales presence in **+30 states** selling cross media solutions
- **+6,000** local, regional and national advertisers
- Compete with **large operators** for rep business and ad sales

VIAMEDIA'S NATIONAL FOOTPRINT WITH 60+ CABLE PARTNERSHIPS



ACCESS
Cable Television, Inc.
Your access to the world!

Google fiber

GREAT WAVE
COMMUNICATIONS

bccvtv

BUC
Cable Television, Inc.

Sunset

G

CATV SERVICE

Consolidated
communications

GVTC
COMMUNICATIONS

CDE
LIGHTBAND

Bledsoe Telephone
Cooperative Inc.

DuoCounty
TELECOM

CenturyLink | prism

Blue Ridge Charter
Spectrum

EATEL

MORRISTOWN
FiberNET
UTILITY SYSTEMS

LUS FIBER
TV • INTERNET • PHONE

epb Fiber Optics
Make the Smart Move.

e

PES
ENERGIZE

RTC
The People's Network
Peoples Rural Telephone Cooperative

NEW WAVE
COMMUNICATIONS

Cincinnati Bell
Fioptics

METRONET
THE POWER OF FIBER

Jackson Energy Authority
One thing you can count on.

SUMMIT
BROADBAND
Performance is Everything

FPB **Vyve**
broadband

SMC
Surrey Telephone Membership Corporation

Kingsland Cable
Locally owned since 1978

SERVICE ELECTRIC
Est. 1940 CABLEVISION

TELE-MEDIA

TELE-MEDIA

Spillway
Communications

lightTUBE
TV • INTERNET • PHONE

MI-CONNECTION
COMMUNITY OWNED. GLOBALLY CONNECTED.

Wilkes
Communications, Inc.

TVC THAMES VALLEY
COMMUNICATIONS

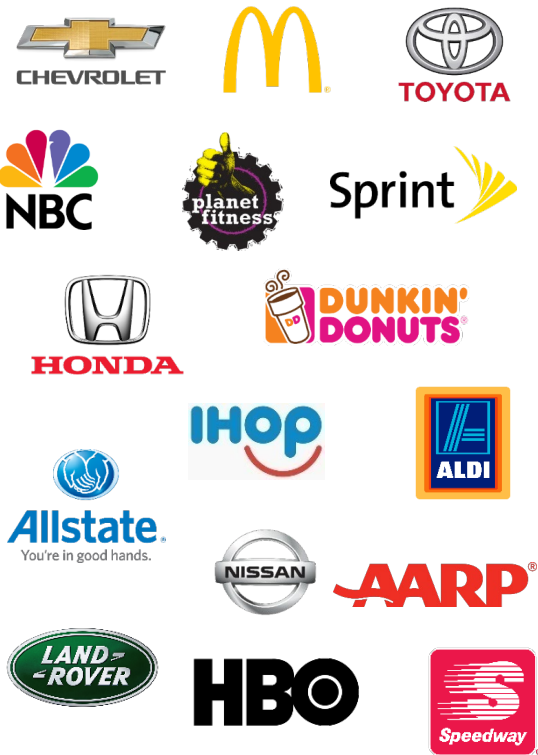
windstream.

WOW!
that's better

WOW!
that's better

6,000+ ADVERTISERS NATIONWIDE

NATIONAL



REGIONAL



LOCAL





A Brief Look at Today's Local Spot Cable Ad Industry



Mark Lieberman,
President/CEO
Viamedia

