



TV VIEWERSHIP REVIEW:

MEDIA WEEK 16:
APRIL 13TH – APRIL 19TH



April 24, 2020



TV VIEWERSHIP DEEP DIVE

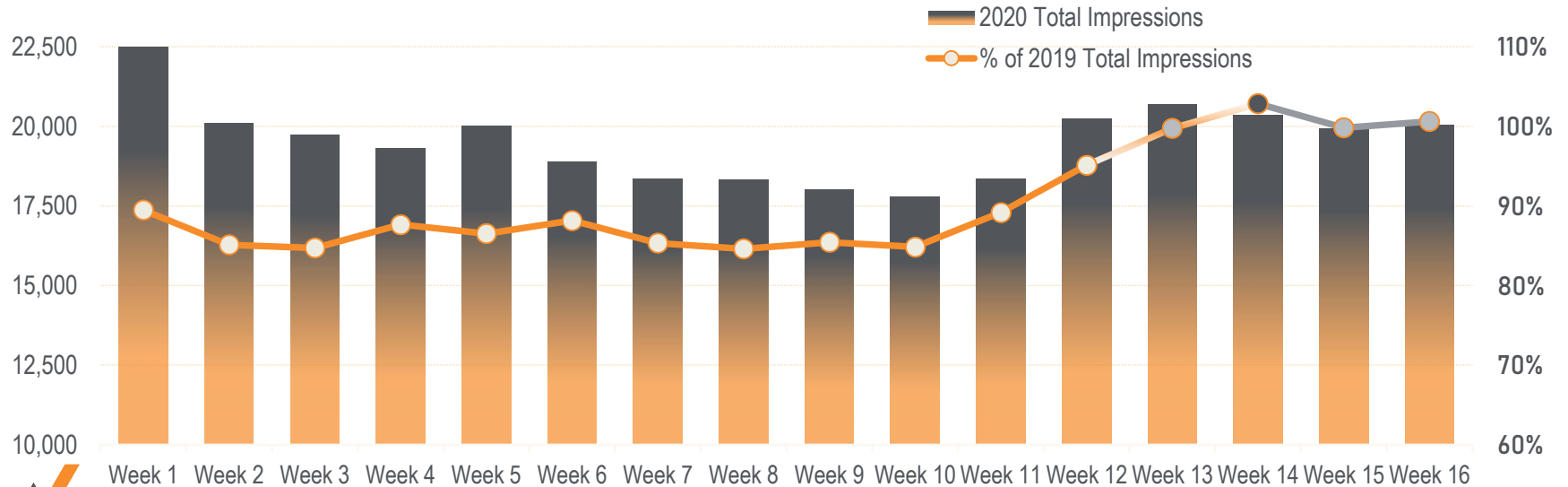


WEEKLY VIEWERSHIP TRENDS

Viewership in Week 16 of 2020 has again surpassed that of 2019. There was also some week-over-week growth, though Total Weekly impressions have been staying relatively consistent.

Estimated Total Weekly Impressions (in millions)

Total Broadcast Week, Total Audience

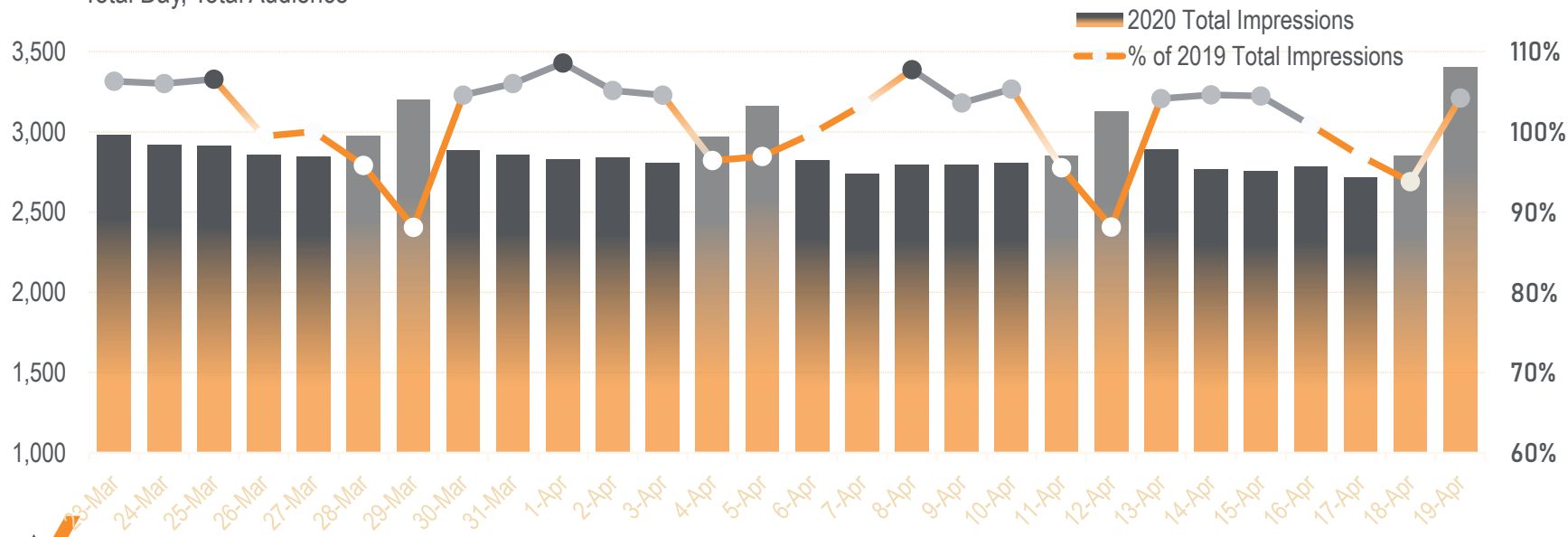


DAILY VIEWERSHIP TRENDS

Despite lower viewership on Friday of Week 16, Sunday showed an uncharacteristic uptick. This was unlike in previous weeks where weekend viewership on both days drop below that of 2019.

Estimated Total Daily Impressions (in millions)

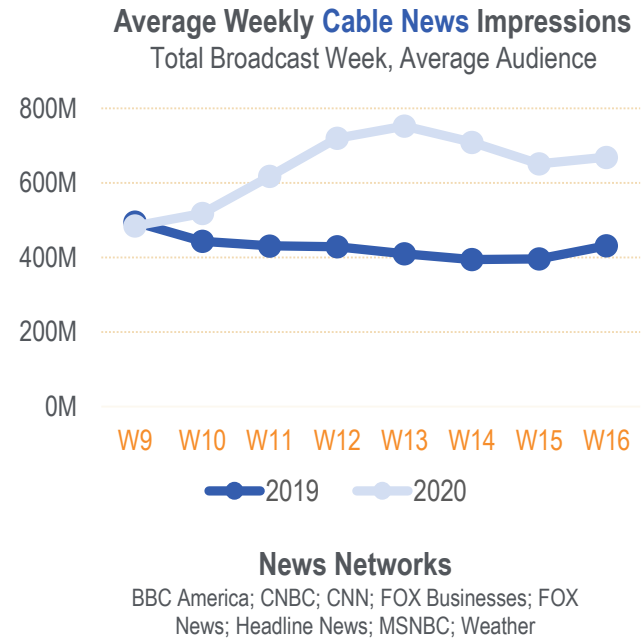
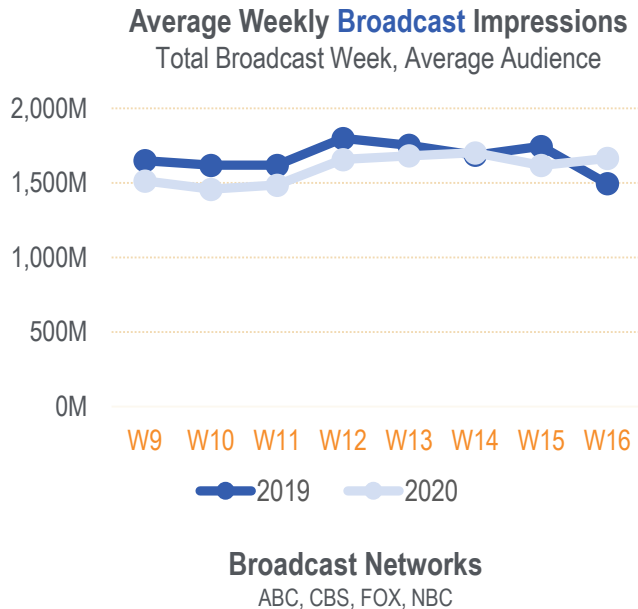
Total Day, Total Audience



NETWORK GENRE PERFORMANCE



After a decline in viewership in Week 15, both Broadcast Networks, and Cable News saw some gains in Week 16.



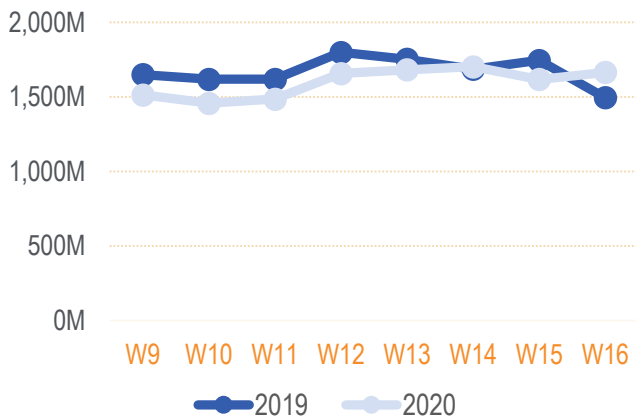
NETWORK GENRE PERFORMANCE



Unlike for Broadcast and Cable News, Entertainment and Lifestyle networks have seen little movement, up or down, over the last month.

Average Weekly Entertainment Impressions

Total Broadcast Week, Average Audience

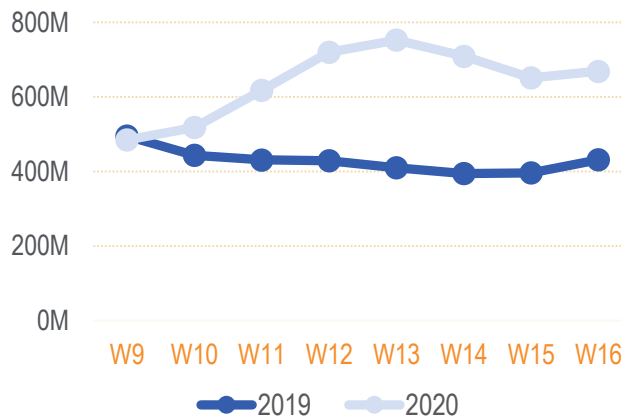


Entertainment Networks

A&E; Adult Swim; American Heroes; AXS; BET; BET Her; BOUNCE; CARTOON;
 CCDXD; CMT; COM; COMEDY.TV; COMET; COZI; CWN; DISCOVERY Networks; E!
 EL REY; ESCAPE; FX; FXX; GAMESHOW; NET; GRIT; HALLMARK DRAMA;
 HEROES; HISTORY; ID; IFC TV; INSPIRATION; LAFF; METV; MOTOR; MTV; MTV2;
 NATGEO Networks; NITE; REELZ; SAMC; SMITH; SYFY; TBS; TLC; TNT; TRAVEL;
 TRU TV; TV LAND; UP; USA; VH1; VICE; WE; WGNA

Average Weekly Cable News Impressions

Total Broadcast Week, Average Audience



Lifestyle Networks

ANIMPL; BRAVO; COOK; DESITNATION AMERICA; DIY; FOOD NETWORK; FYI;
 GREAT AMER COUNTRY; HGTV; ION; LIFETIME; LOGO; MY DESTINATION;
 OVATN; OWN; OXYGN; POP; RFDTV

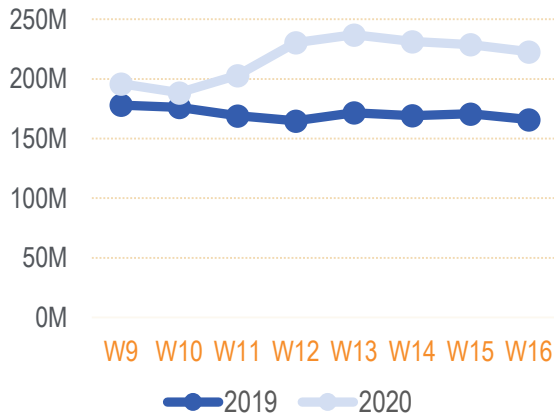
NETWORK GENRE PERFORMANCE



After a dip in ratings last week, Kids & Family networks have returned to previous viewership but overall, viewership across these categories as stable.

Ave Weekly Hispanic Imps

Total Broadcast Week, Average Audience

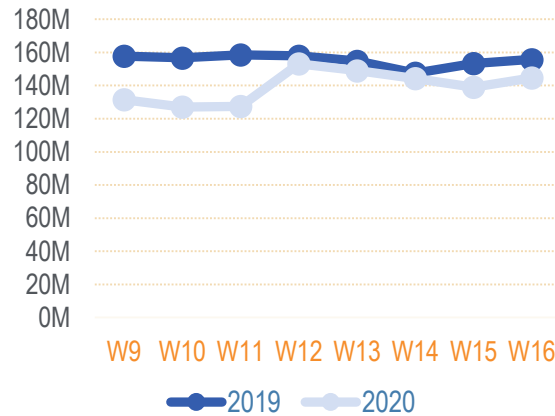


Hispanic Networks

AZTECA; ESTR; GALA; NBC UNI; TELEMUNDO;
UNIMAS; UNIVISION

Ave Weekly Kids & Family Imps

Total Broadcast Week, Average Audience

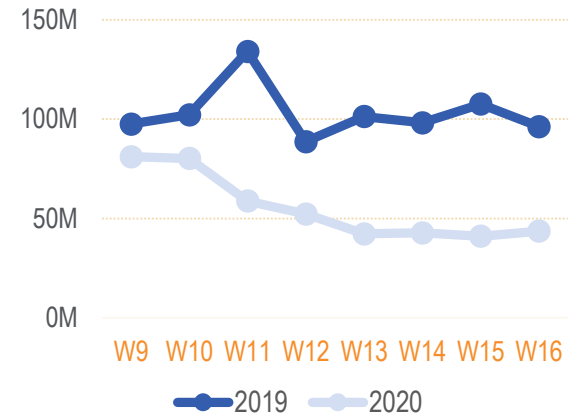


Kids & Family Networks

BABYFIRST; BOOMERANG; DISNEY; DISNEY JR; FAMILY
ENTERTAINMENT; FREEFORM; HALLMARK; NICK; NICK JR;
NICKTOON; TEEN NICK; UNI KIDS

Ave Weekly Sports Imps

Total Broadcast Week, Average Audience



Sports Networks

BEIN; BEIN HISP; ESPNL ESPN DEP; ESPN2; FOX
SPORTS 1; FOX SPORTS 2; GOLF; MLBTV; NBATV;
NBC SPORTS; NFL NETWORK; TENNIS

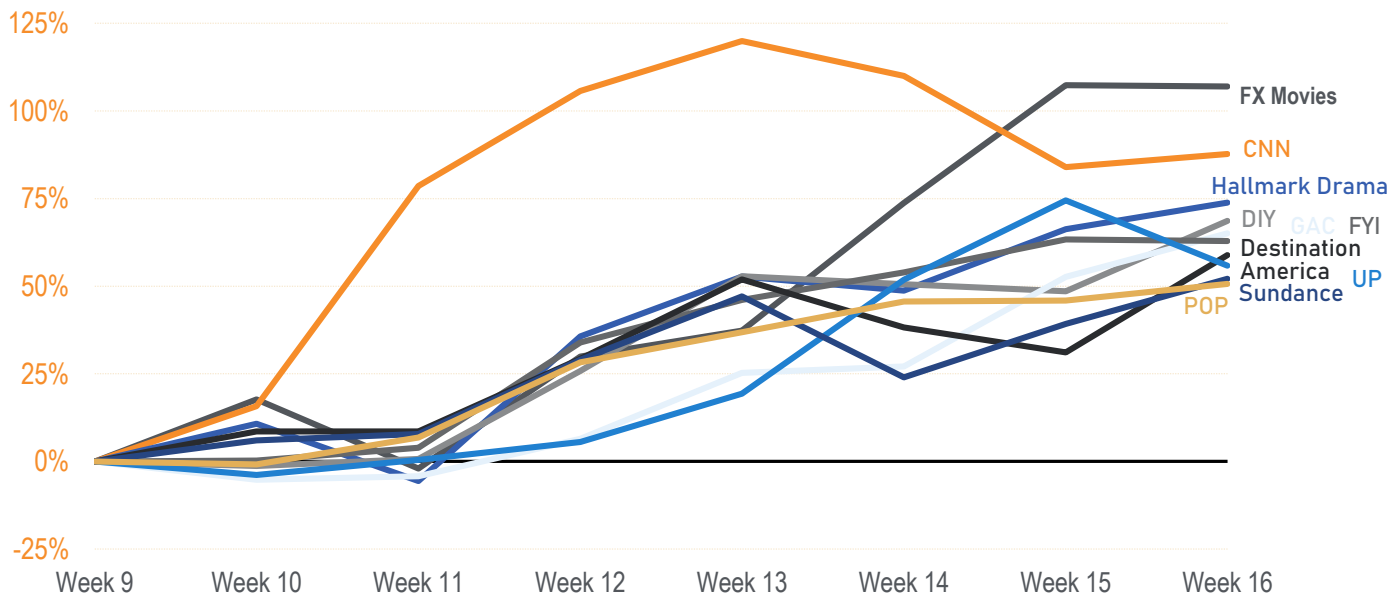
CHANNELS WITH THE MOST INCREASED VIEWERSHIP



Through down from the week leading up to Easter, UP viewership remains far above its level 8 weeks ago. Networks that play movies have continued to do well, as have those with a large content libraries for their Daytime programming block.

Change in Viewership over Past 2 Months

Average Impressions per 15 min, Total Audience



Channel	Average Viewership this week (000)
FX Movies	123
CNN	1,250
Hallmark Drama	85
DIY	163
Great American Country	71
FYI	101
Destination America	69
UP	104
Sundance	150
POP	81

Source: Nielsen National TV Ratings

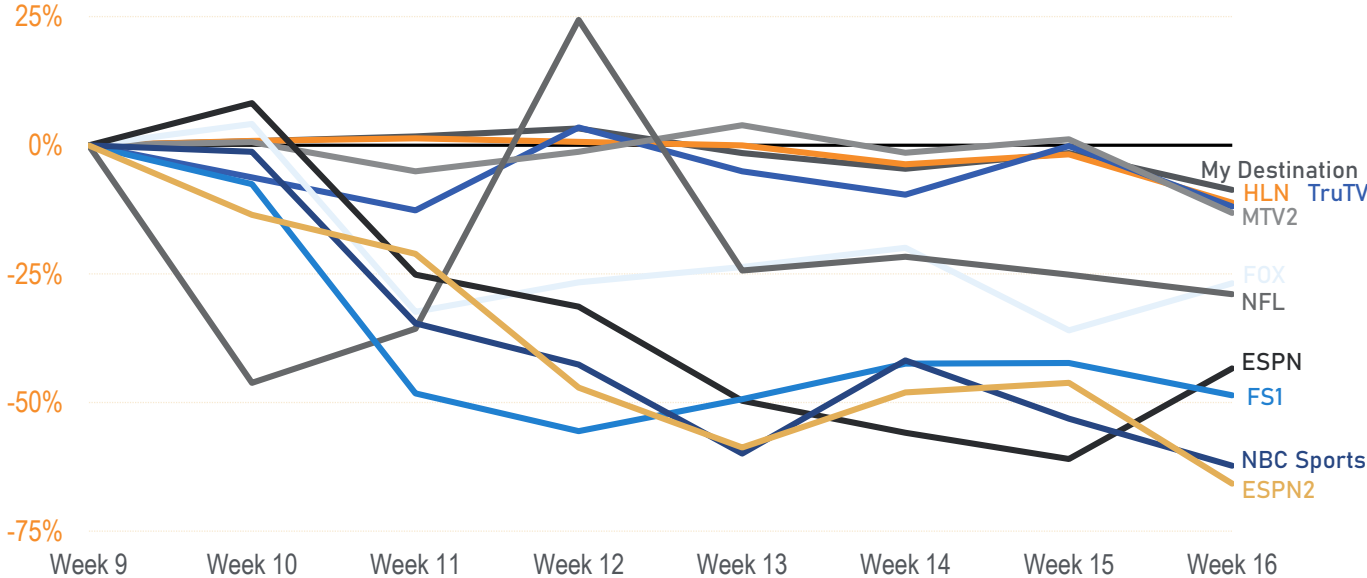
CHANNELS WITH THE MOST DECREASED VIEWERSHIP



While the average Broadcast or Cable News network has grown in viewership over the last two months, Fox and Headline News have struggled to maintain their average level of impressions. Sports networks continue to have low viewership.

Change in Viewership over Past 2 Months

Average Impression per 15 min., Total Audience



Channel	Average Viewership this week (000)
My Destination	100
Headline News	207
TruTV	110
MTV2	33
FOX	225
NFL Networks	55
ESPN	260
FOX Sports 1	61
NBC Sports	39
ESPN2	48

*Some Sport Channels have been removed
Source: Nielsen National TV Ratings

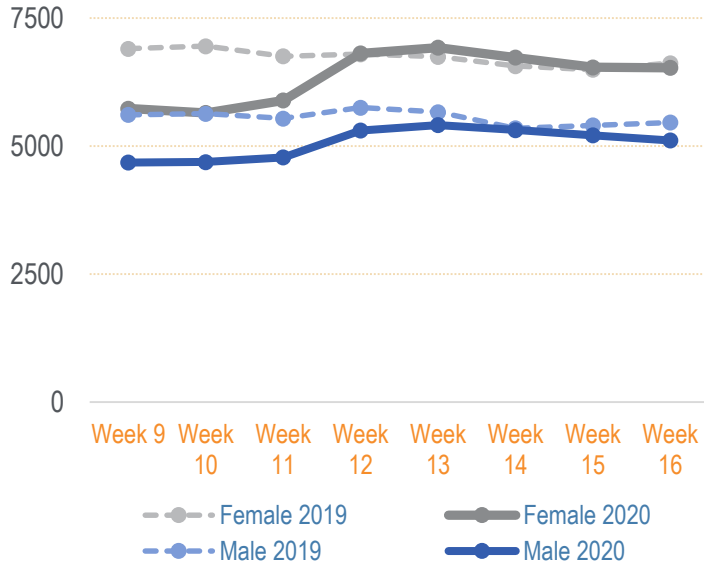
DEMO REVIEW: GENDER (Age 25-54)



Females in this age bracket have kept pace with 2019 viewership over the last few weeks, while male viewership has dropped slightly. Though still far behind in viewership of Lifestyle networks, men are now a faster growing part of this audience.

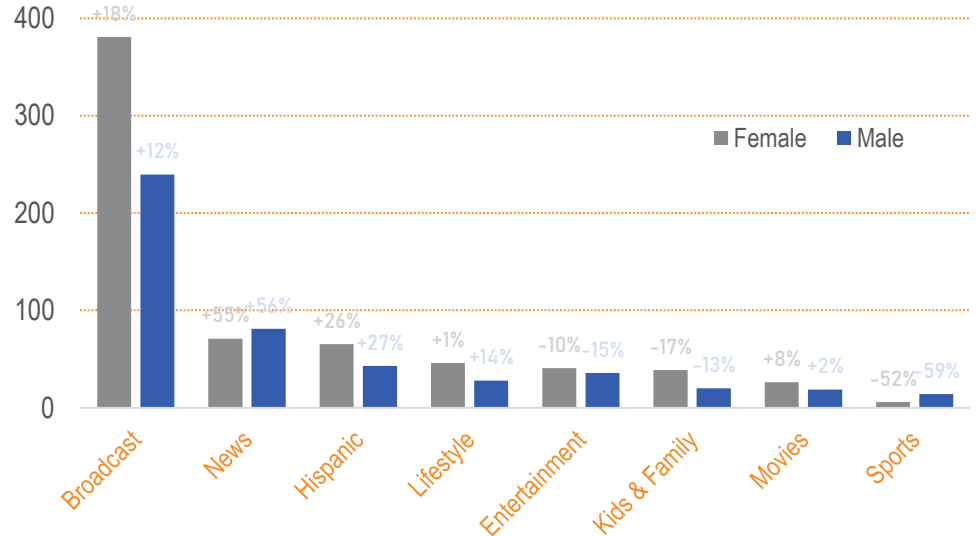
Estimated Total Weekly Impressions

Total Broadcast Week, Total Audience Age 25-54



Average Weekly Genre Impressions

Total Broadcast Week, Total Audience Age 25-54



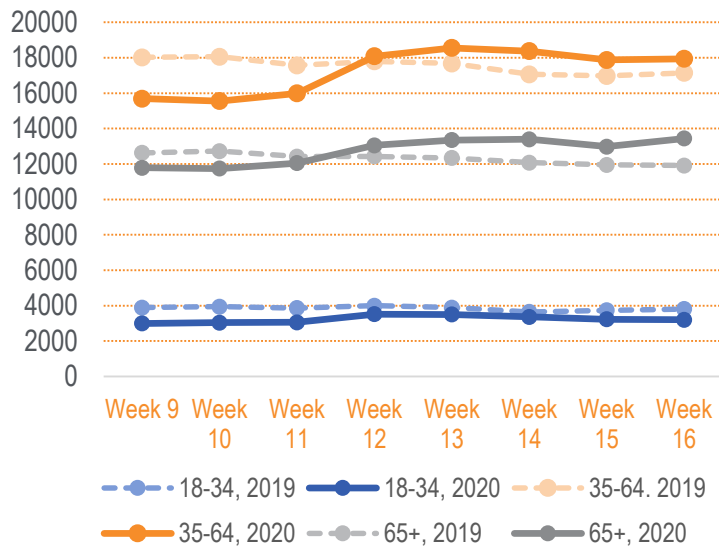
DEMO REVIEW: AGE



Since week 12 of 2020, both those 35-64, and 65+ have solidly outpaced 2019 viewership. 18-34 year-olds also increased TV viewing during this time, though still lagging behind 2019, especially in Entertainment and Kids & Family viewing.

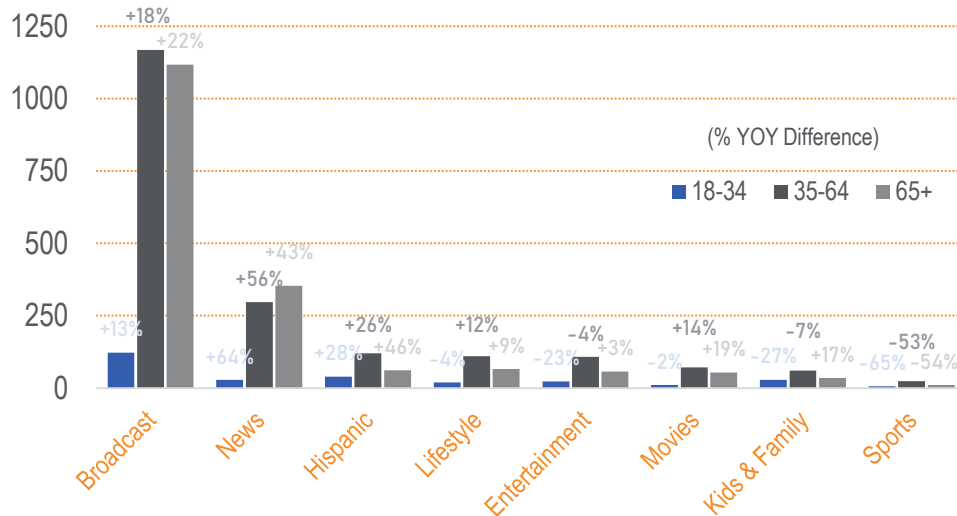
Estimated Total Weekly Impressions

Total Broadcast Week, Total Audience



Average Weekly Genre Impressions

Total Broadcast Week, Total Audience

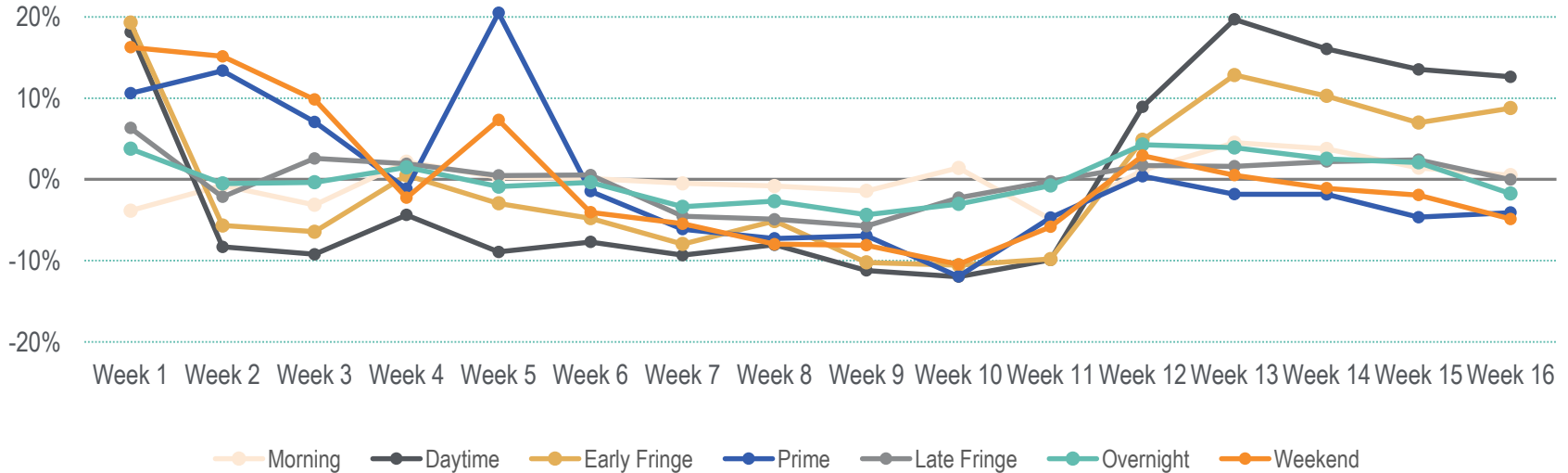


DAYPART TRENDS

Daypart viewership has leveled out, with most dayparts at or slightly below average viewership, except Daytime and Early Fringe, which are about 10% above average weekly impression for 2020.

% Difference from 2020 Daypart Average

Total Broadcast Week, Average Audience



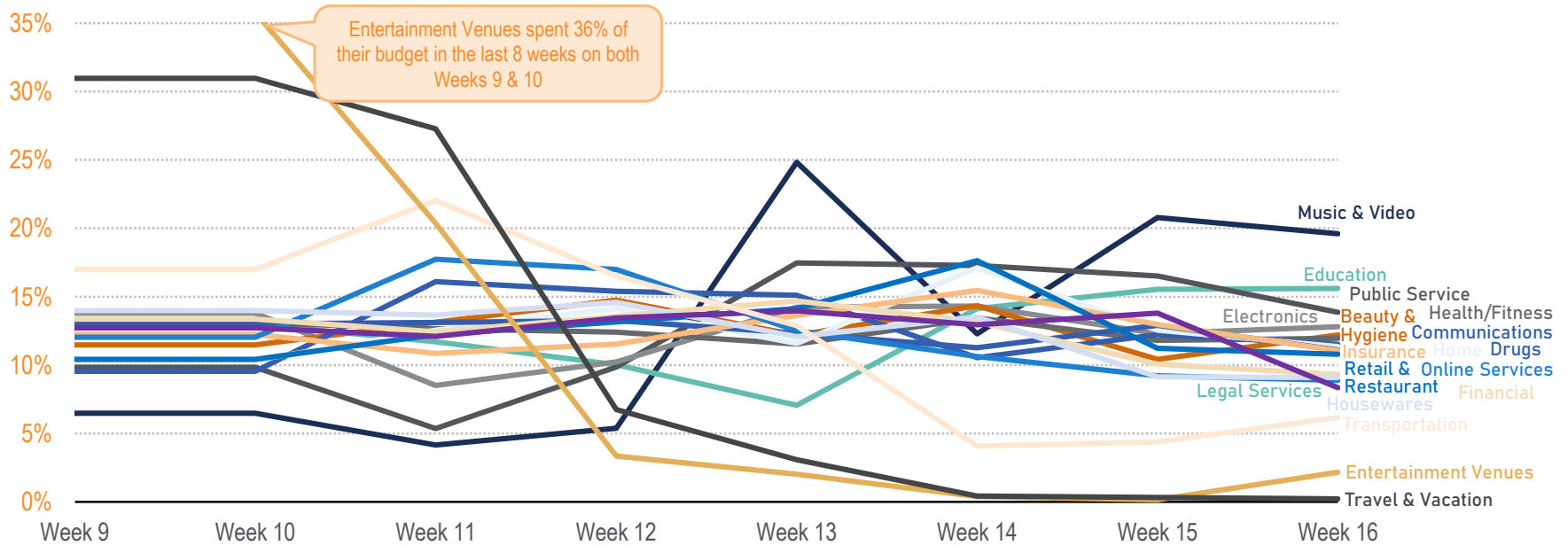


DR ADVERTISER **TRENDS**

ADVERTISER CATERGORIES' RESPONSES

Spending by Education advertisers has grown and stabilized over the last few weeks, as the jobless numbers have continued to skyrocket, and many begin to think this will last longer than originally expected.

Distribution of Spending over the Last 8 Weeks, by Category



TOP ADVERTISERS CATEGORIES WITH HIGHEST WoW INCREASE



Dove Beauty, not traditionally a DR advertiser, took advantage of current the current media environment to help boost a campaign for their Beauty Bar. Facebook, looking to get a bigger cut of the video chatting pie has launched some major spending for their Portal product.

Entertainment Venues

	Spend (000)	%WoW
Total	\$158	+1194%
Treasure Island	\$88	N/A
WNBA	\$68	N/A
Livestock Auction	\$1	N/A

Transportation (Sales and Repair)

	Spend (000)	%WoW
Total	\$3,234	+41%
Carvana	\$2,122	+14%
DriveTime	\$647	+850%
Endurance Insurance	\$134	+19%

Beauty, Hygiene & Personal Care

	Spend (000)	%WoW
Total	\$10,946	+17%
Dove Beauty	\$1,295	N/A
Flawless Brows	\$844	+63%
Hempvana HydroClean	\$758	+31%

Electronics & Software

	Spend (000)	%WoW
Total	\$17,427	+4%
Samsung Galaxy	\$3,674	-23%
Portal from Facebook	\$1,932	N/A
Consumer Cellular	\$1,562	-27%

TOP ADVERTISERS CATEGORIES WITH STABLE SPEND WOW



The Health & Fitness category has been stable week-over-week but at-home fitness and weight loss solutions/apps have been increasing their spending. Likewise, while there was slightly spending this week in Housewares, some brands increase visibility as people spend more time at home.

Health & Fitness		
	Spend (000)	%WoW
Total	\$31,891	+1%
Noom	\$2,733	+9%
Pataday	\$1,965	-3%
Beachbody on Demand	\$1,831	+81%

Education		
	Spend (000)	%WoW
Total	\$7,674	+0%
University of Phoenix	\$1,427	-12%
WGU	\$1,138	-8%
SNHU	\$908	+4%

Housewares & Appliances		
	Spend (000)	%WoW
Total	\$5,457	-1%
Ashley Homestore	\$761	N/A
GraniteStone Stackmaster	\$551	+66%
Sleep Number	\$418	+2100%

TOP ADVERTISERS CATEGORIES WITH WOW DECREASES



While Grubhub has pulled back on TV spending, Doordash has increased spending in an attempt to gain share of wallet. Disney+ has also been cutting back on spending through is still spending over \$1M a week to reach TV viewers.

Online Services & Shopping

	Spend (000)	%WoW
Total	\$7,861	-4%
Grubhub.com	\$1,471	-23%
Doordash	\$1,206	+24%
Stamps.com	\$1,181	0%

Retail, Restaurant & Food Venues

	Spend (000)	%WoW
Total	\$29,392	-4%
Domino's	\$6,511	+10%
Little Caesars	\$2,670	-4%
Popeyes	\$1,751	+22%

Music & Video

	Spend (000)	%WoW
Total	\$3,946	-6%
Trolls World Tour	\$3,074	-16%
Amazon Music	\$831	+62%
Alan Jackson Precious...	\$26	+102%

Communications

	Spend (000)	%WoW
Total	\$12,143	-6%
AT&T	\$4,042	0%
One World Together	\$2,188	+123%
Disney+	\$1,176	-32%

TOP ADVERTISERS IN CATEGORIES WITH WOW DECREASES



While overall these categories have seen declines in spending, the UPS store has increased visibility in the last week as more people are depending on them. Also Experian Boost has been consistently spending as many may be worrying about their credit score.

Miscellaneous			Financial			Home & Garden			Drug & Toiletry		
	Spend (000)	%WoW		Spend (000)	%WoW		Spend (000)	%WoW		Spend (000)	%WoW
Total	\$27,221	-6%	Total	\$17,966	-7%	Total	\$18,238	-10%	Total	\$75,409	-14%
The UPS Store	\$1,252	+21%	Chase Bank	\$1,949	N/A	Brand Power	\$1,460	--2%	Humira	\$6,247	-52%
Shine Armor	\$1,216	+14%	Discover It	\$1,839	+3%	Wayfair.com	\$1,155	-38%	Skyrizi	\$5,243	N/A
AARP Real Possibilities	\$1,174	-8%	Experian Boost	\$1,221	-3%	Apartments.com	\$1,056	-25%	Otezla	\$5,076	-17%

TOP ADVERTISERS CATEGORIES WITH MOST WOW DECREASES



As parts of the economy are slowed to a near halt, many of the brands in these categories, with the exception of Public Service, have indefinitely postponed some of their spending, waiting for a shift in consumer behavior & sentiment.

Insurance		
	Spend (000)	%WoW
Total	\$52,035	-15%
Progressive	\$8,444	-10%
Geico	\$6,569	-27%
State Farm	\$6,312	+6%

Public Service		
	Spend (000)	%WoW
Total	\$30,476	-16%
United States Census 2020	\$3,736	-35%
American Red Cross	\$3,091	-24%
ASPCA	\$2,773	+25%

Travel, Vacation and Hotel		
	Spend (000)	%WoW
Total	\$118	-32%
Low Cost Airlines	\$72	-23%
National Park Service	\$25	-55%
SmartFares	\$9	-37%

Legal Services		
	Spend (000)	%WoW
Total	\$2,056	-40%
Mesothelioma ~ MRFHM	\$396	+1%
Los Defensores	\$233	-4%
Legal Zoom	\$158	-32%