



TV VIEWERSHIP REVIEW:

MEDIA WEEK 17:
APRIL 20TH – APRIL 26TH



April 30, 2020



TV VIEWERSHIP DEEP DIVE

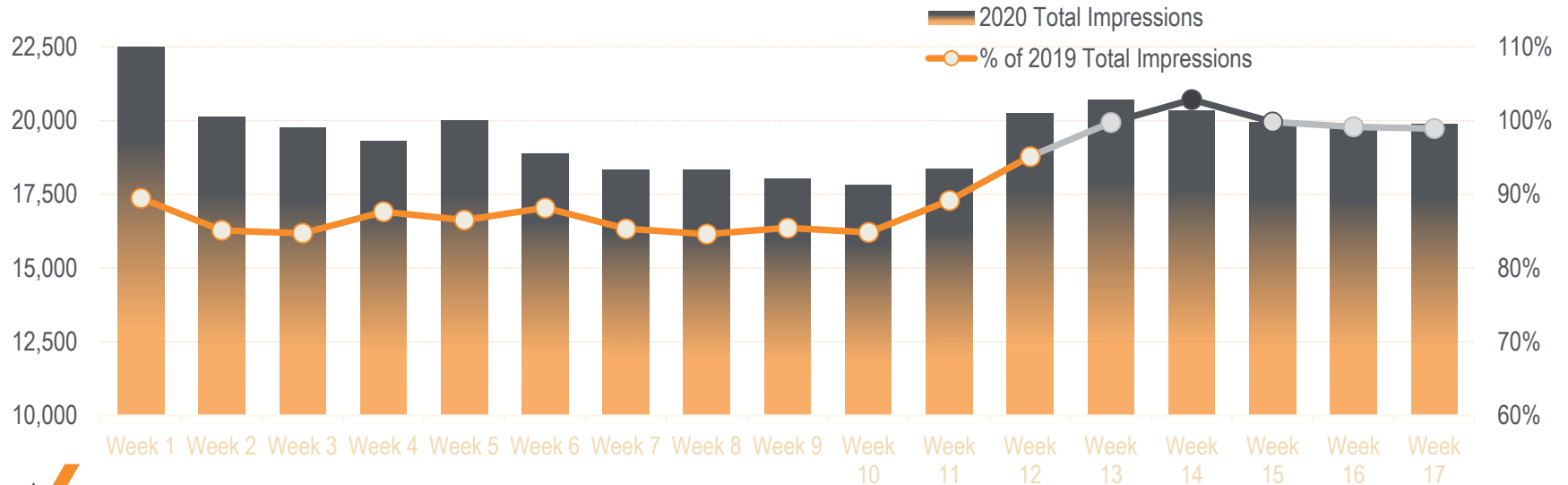


WEEKLY VIEWERSHIP TRENDS

Viewership has remained incredibly consistent for the past 3 weeks. We may see some changes in the coming weeks as states start to lift stay-at-home orders and the weather changes.

Estimated Total Weekly Impressions (in millions)

Total Broadcast Week, Total Audience

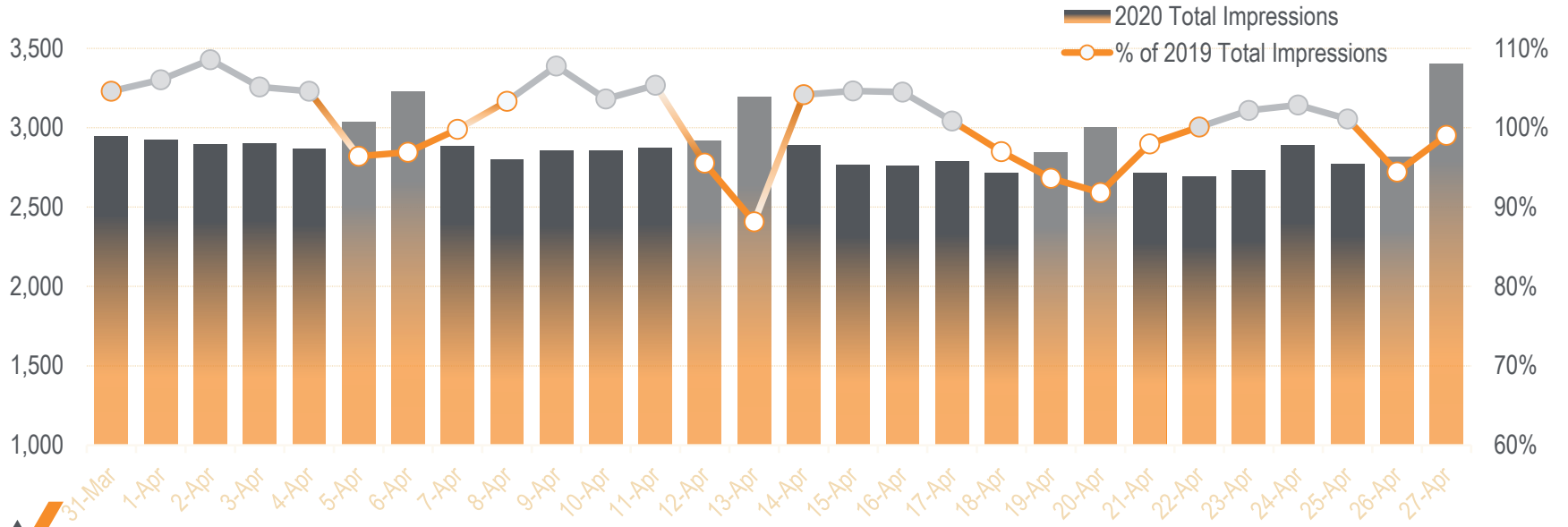


DAILY VIEWERSHIP TRENDS

The weekday spikes in viewership have smoothed out over the last couple weeks, though Thursday of Week 17 did see a slight jump.

Estimated Total Daily Impressions (in millions)

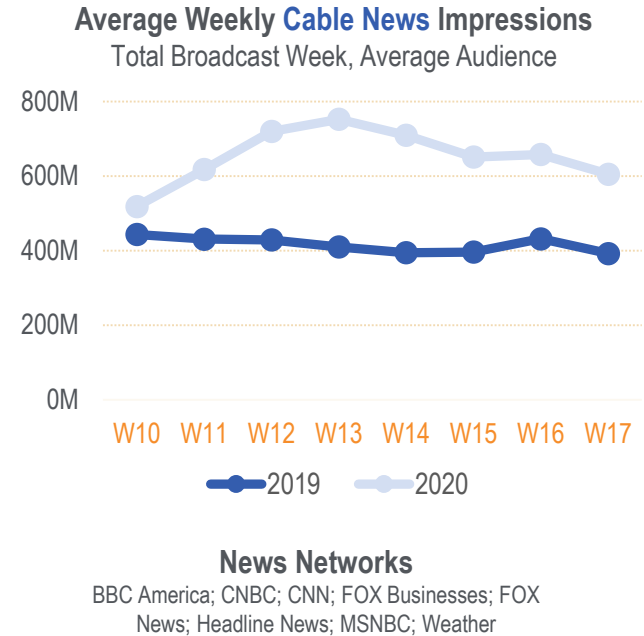
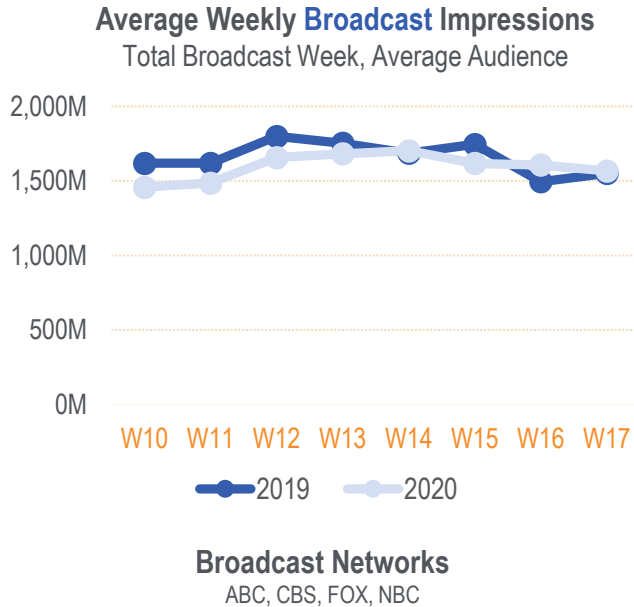
Total Day, Total Audience



NETWORK GENRE PERFORMANCE



Broadcast viewership remains stable. Cable news saw drop in viewership, though this drop was parallel to that of Week 17 2019.

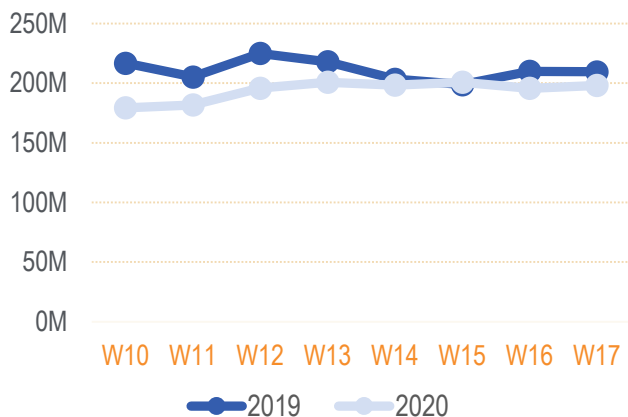


NETWORK GENRE PERFORMANCE



After surpassing 2019 viewership in Week 12, Lifestyle networks have stayed above the 2019 average, showing an increased appetite among consumers for this type of programming – especially their strong daytime lineups.

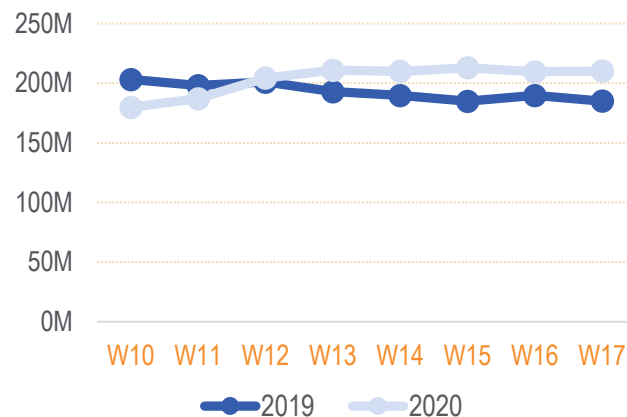
Average Weekly Entertainment Impressions
Total Broadcast Week, Average Audience



Entertainment Networks

A&E; Adult Swim; American Heroes; AXS; BET; BET Her; BOUNCE; CARTOON; CCDDX; CMT; COM; COMEDY.TV; COMET; COZI; CWN; DISCOVERY Networks; EI; 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

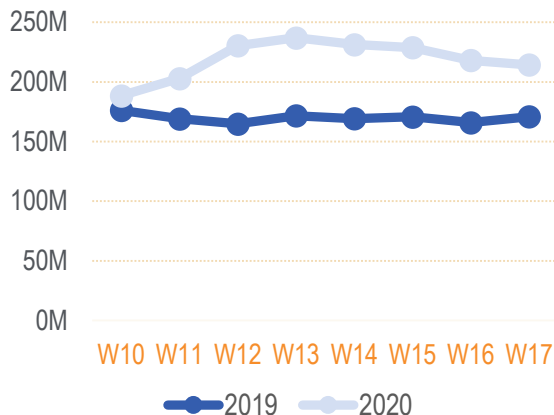
NETWORK GENRE PERFORMANCE



The NFL Draft represented a major bright spot for sport programming this week, and the viewership lift from the Draft in 2020 was more significant than in 2019.

Ave Weekly Hispanic Imps

Total Broadcast Week, Average Audience

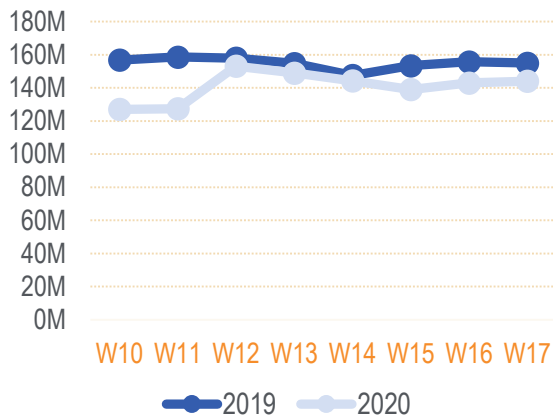


Hispanic Networks

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

Ave Weekly Kids & Family Imps

Total Broadcast Week, Average Audience

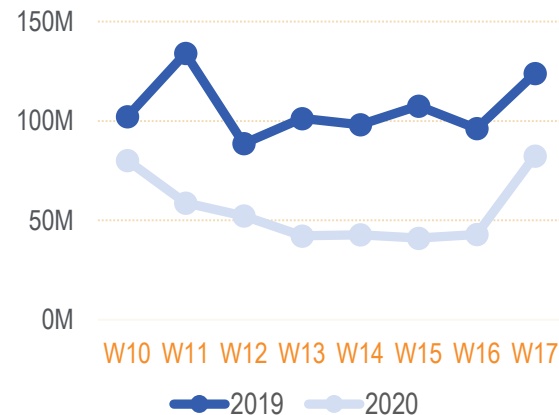


Kids & Family Networks

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; MLBTB; NBATV;
NBC SPORTS; NFL NETWORK; TENNIS

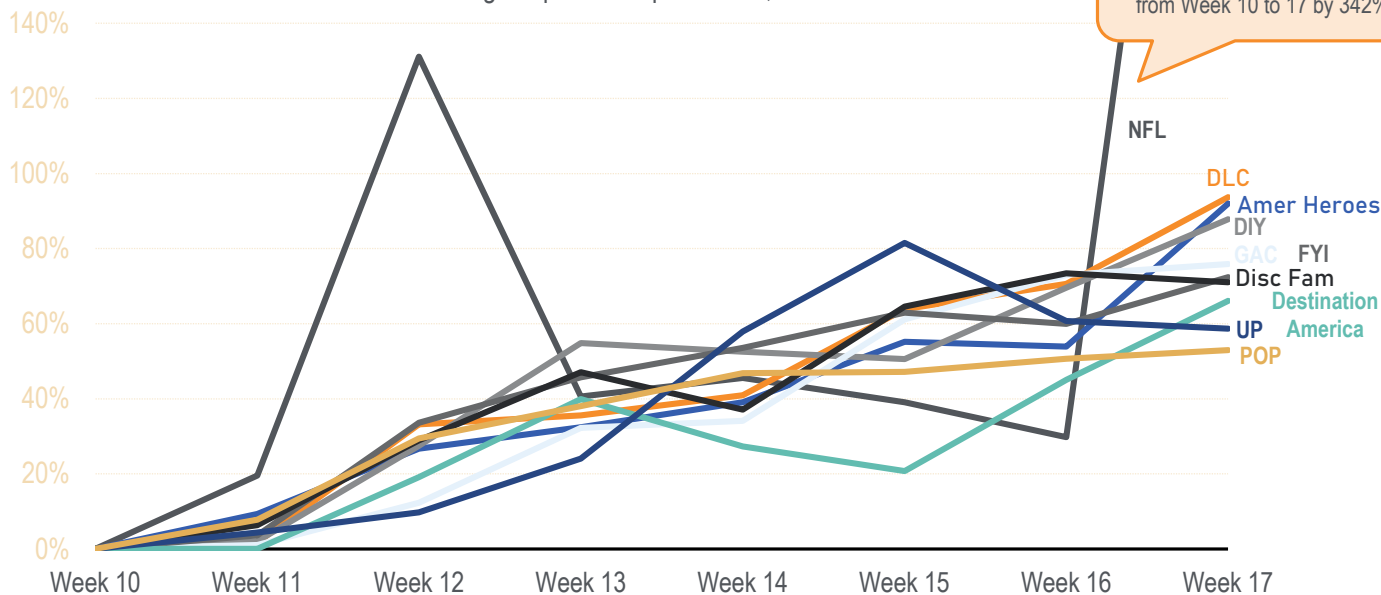
CHANNELS WITH THE MOST INCREASED VIEWERSHIP



The Draft was a major viewership win for the NFL Network. Both Discovery Life and Discovery Family have seen solid viewership growth over the last few weeks.

Change in Viewership over Past 2 Months

Average Impressions per 15 min, Total Audience



The Draft led to the NFL Network increasing viewership from Week 10 to 17 by 342%

Channel	AverageW17 Viewership (000)
NFL Network	183.94
Discovery Life	45.73
American Heroes	99.5
DIY	179.03
Great American Country	71.34
FYI	106.79
Discovery Family	27.96
Destination America	78.37
UP	101.3
POP	107.3

Source: Nielsen National TV Ratings

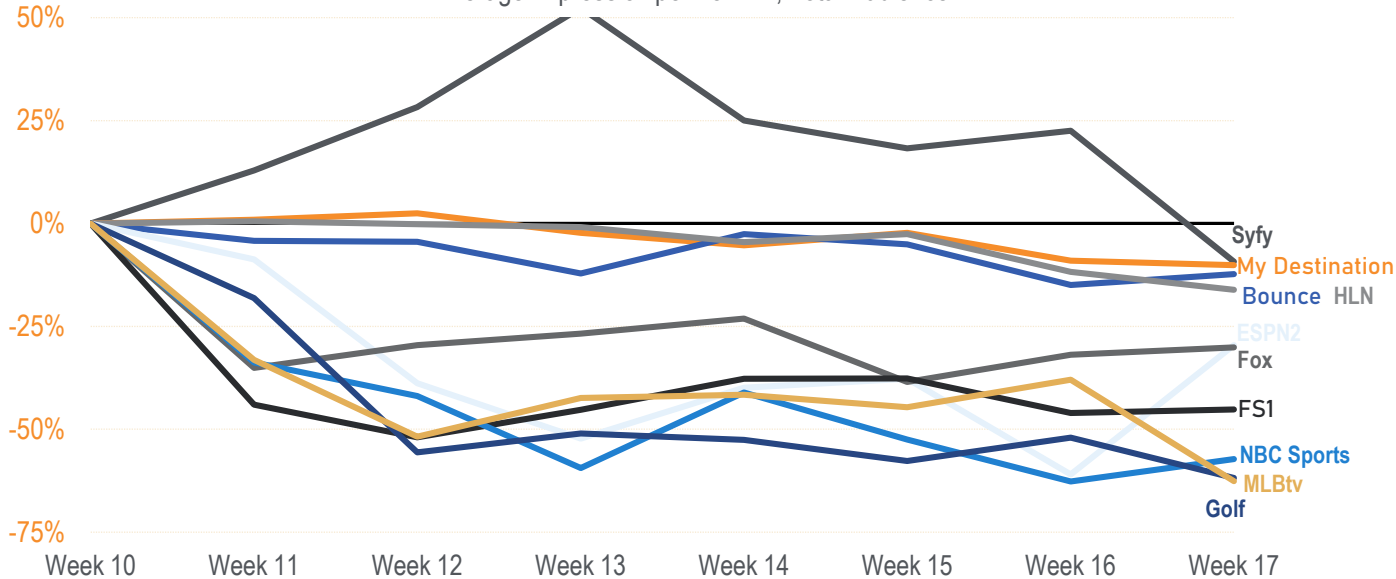
CHANNELS WITH THE MOST DECREASED VIEWERSHIP



Sports networks that didn't carry Draft coverage continued to struggle. Syfy also dropped below their Week 10 performance, despite strong growth in Weeks 12 and 13.

Change in Viewership over Past 2 Months

Average Impression per 15 min., Total Audience



Channel	Average Viewership this week (000)
Syfy	165.79
My Destination	98.98
Bounce	187.83
Headline News	196.67
ESPN2	85.75
Fox	223.42
Fox Sports 1	60.61
NBC Sports	43.73
Golf	31.76
MLBtv	20.62

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

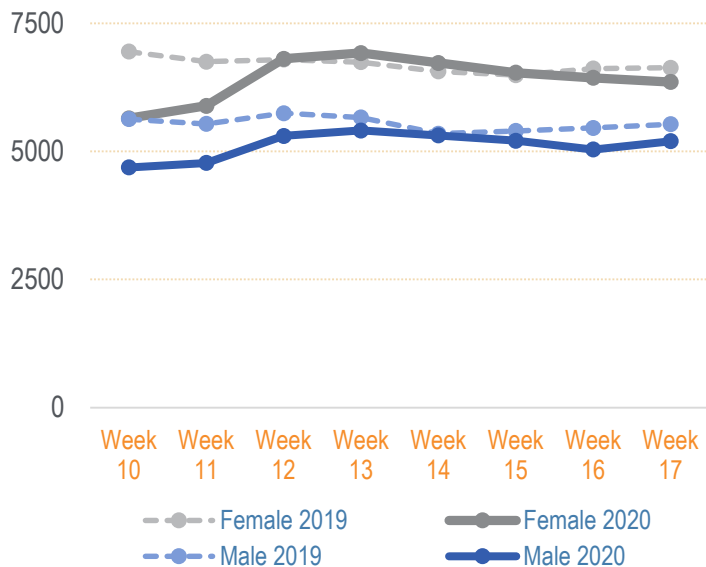
DEMO REVIEW: GENDER (Age 25-54)



Women continue to comprise the majority of TV Viewers. Hispanic women especially are increasing viewership at a higher rate than Hispanic men. Movie channels have also continued to see growth during the pandemic from both men and women.

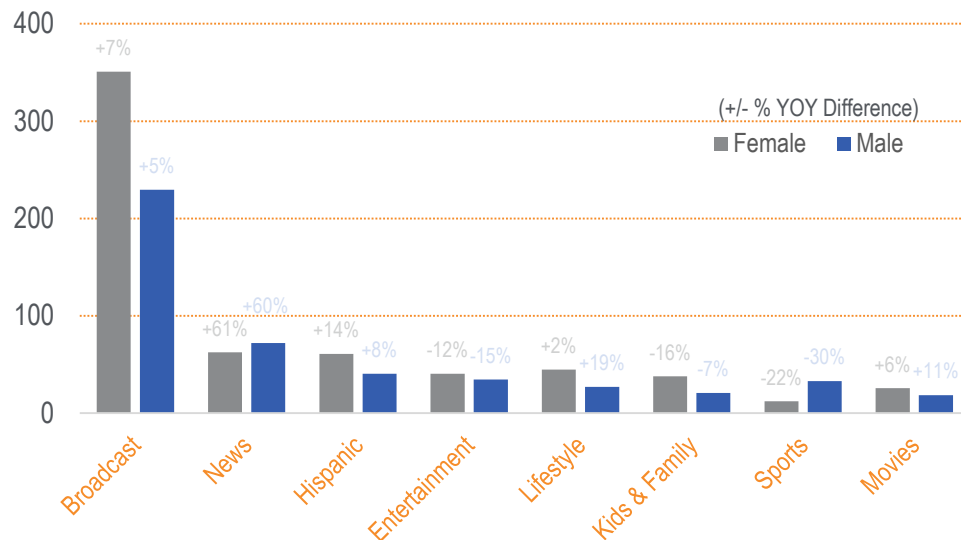
Estimated Total Weekly Impressions

Total Broadcast Week, Total Audience Age 25-54



Average Weekly Genre Impressions

Total Broadcast Week, Total Audience Age 25-54



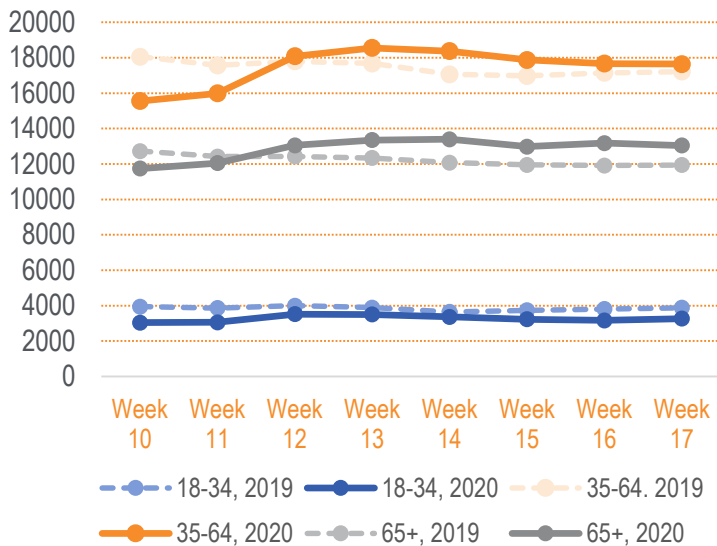
DEMO REVIEW: AGE



Broadcast is one of the places we see the biggest difference between the age groups, with Millennials showing relatively low interest. This group has also decreased their Lifestyle and Entertainment network viewership, while the other groups have increased.

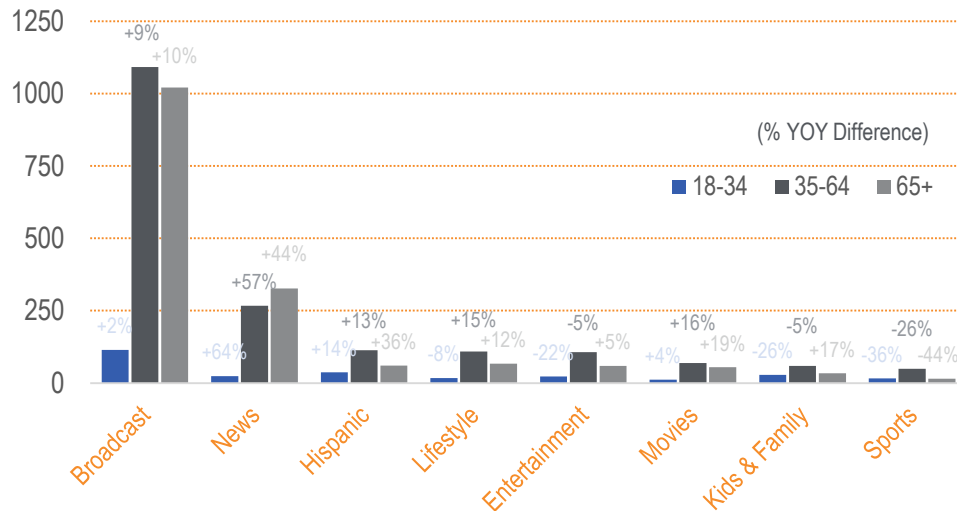
Estimated Total Weekly Impressions

Total Broadcast Week, Total Audience



Average Weekly Genre Impressions

Total Broadcast Week, Total Audience

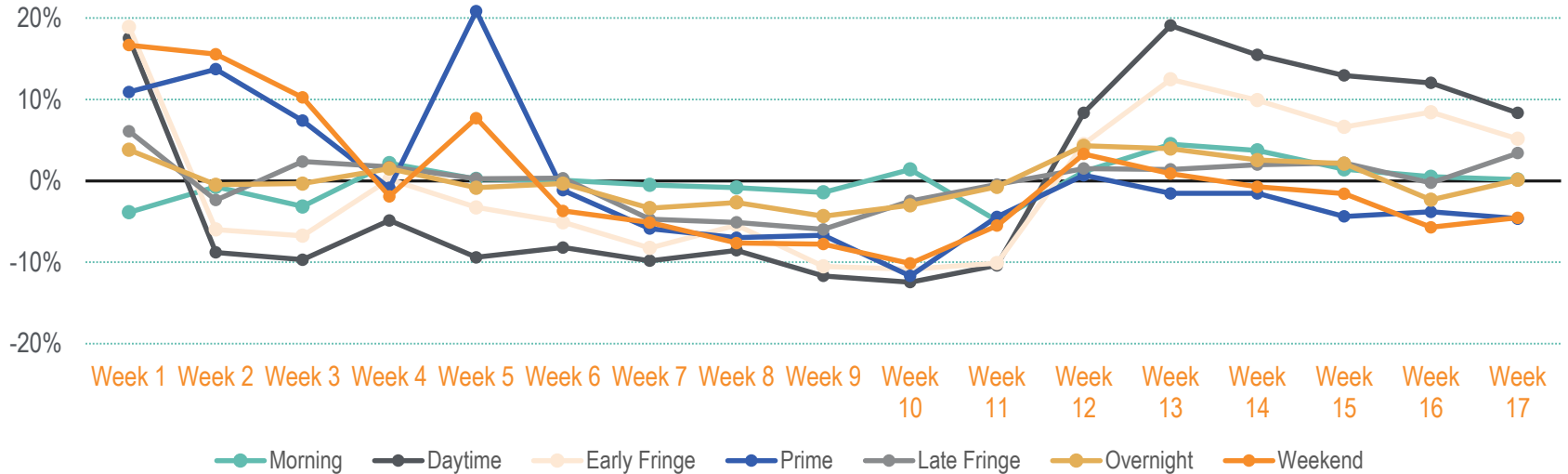


DAYPART TRENDS

As consumers looked for entertainment outside of TV to watch during the day, there was a small lift in Late Fringe and Overnight viewership.

% Difference from 2020 Daypart Average

Total Broadcast Week, Average Audience



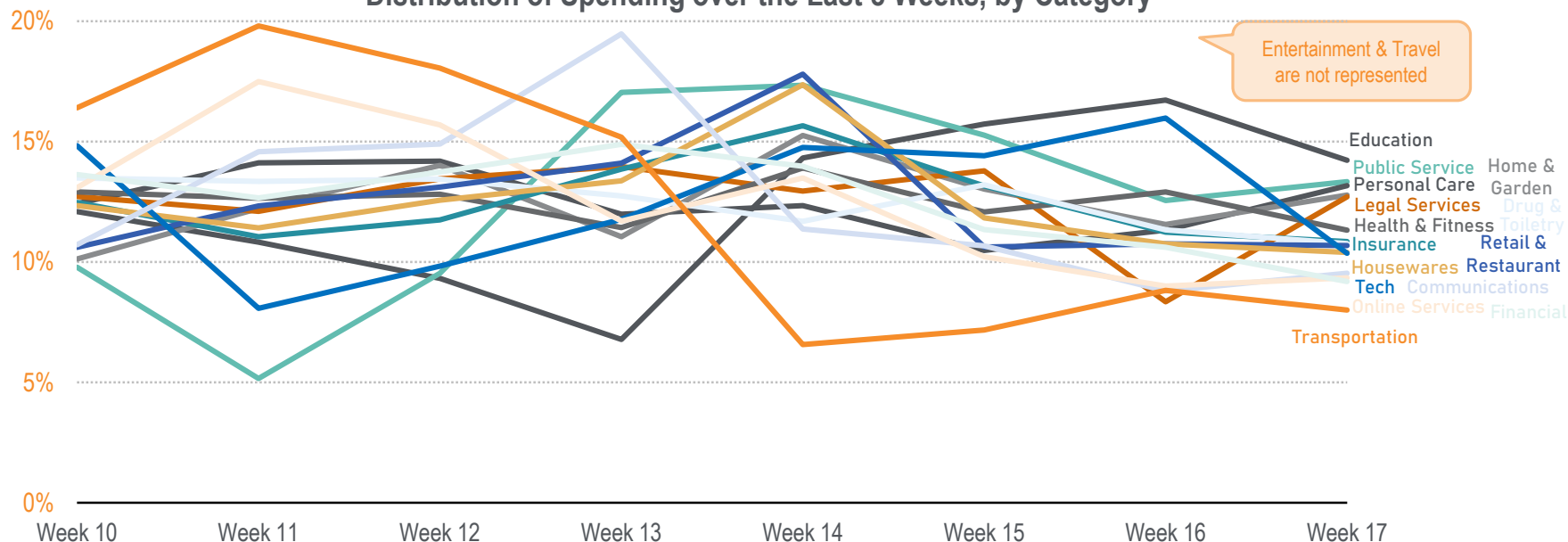


DR ADVERTISER **TRENDS**

ADVERTISER CATERGORIES' RESPONSES

Outside of the struggling categories of Travel & Entertainment, Transportation has also pulled back on spending as most Americans are interacting with their cars less. Education, on the other hand, continues to be a top focus.

Distribution of Spending over the Last 8 Weeks, by Category



TOP ADVERTISERS CATEGORIES WITH HIGHEST WOW INCREASE



While still spending fractions of what the Travel sector would be otherwise, Sandal's return to air represented a major increase in spending for the category overall. Dove continues to spend big on their COVID-19-related Beauty Bar campaign.

Legal Services		
	Spend (000)	%WoW
Total	\$3,3133	+52%
Opioids ~ Prime Clerk	\$1,054	N/A
Mesothelioma ~ MRHFM	\$405	+2%
Legal Zoom	\$249	+58%

Travel, Vacation and Hotel		
	Spend (000)	%WoW
Total	\$152	+29%
Low Cost Airlines	\$64	-11%
Sandals	\$56	N/A
National Park Service	\$15	-38%

Beauty, Hygiene & Personal Care		
	Spend (000)	%WoW
Total	\$16,639	+16%
Dove Beauty Bar	\$1,759	+36%
Pataday	\$1,665	-15%
1-800-Contacts	\$1,147	+71%

TOP ADVERTISERS CATEGORIES WITH WOW INCREASES



Home stores have increased spending, hoping that increased time at home will translate to increased homegoods spending. AT&T increased investment, specifically in their streaming TV Product.

Home & Garden		
	Spend (000)	%WoW
Total	\$25,075	+11%
Lowe's	\$3,650	+87%
Home Depot	\$3,355	+340%
Wayfair.com	\$1,380	+19%

Communications		
	Spend (000)	%WoW
Total	\$14,545	+8%
AT&T	\$5,323	+32%
Consumer Cellular	\$1,430	-8%
Cricket Wireless	\$1,072	N?A

Public Service		
	Spend (000)	%WoW
Total	\$29,747	+6%
ASPCA	\$4,824	+74%
United States Census	\$3,266	-13%
Feeding America	\$1,932	+287%

Online Services & Shopping		
	Spend (000)	%WoW
Total	\$9,909	+4%
Grubhub.com	\$1,557	+6%
The UPS Store	\$1,248	0%
Stamps.com	\$1,027	-13%

TOP ADVERTISERS CATEGORIES WITH SLIGHT WOW DECREASES



Domino's and Little Caesar's remain the top spending brands in Retail & Restaurant as they try to keep their pizza delivery top of mind. Also, newer, high-end cookware brand made.in has increased spending to capitalize on increased home-cooking.

Retail, Restaurant & Food Venues

	Spend (000)	%WoW
Total	\$28,438	-1%
Domino's	\$6,659	+2%
Little Caesars Pizza	\$2,554	-4%
Burger King	\$2,108	+44%

Housewares & Appliances

	Spend (000)	%WoW
Total	\$6,596	-3%
Bissel Cordless Max	\$1,245	+840%
My Pillow	\$595	-35%
Made.in	\$490	+131%

Insurance

	Spend (000)	%WoW
Total	\$50,357	-3%
Progressive	\$8,065	-4%
Geico	\$7,324	+11%
State Farm	\$6,102	-3%

Drug & Toiletry

	Spend (000)	%WoW
Total	\$71,906	-5%
Humira	\$5,305	-15%
Skyrizi	\$4,844	-8%
Dupixent	\$4,514	+3%

TOP ADVERTISERS IN CATEGORIES WITH WOW DECREASES



Weight Watchers returned to air last week, possibly in response to Noom's high spending, as well as to educate their consumers on WW's virtual meetings

Transportation (Sales and Repair)		
	Spend (000)	%WoW
Total	\$5,801	-9%
Carvana.com	\$2,511	+18%
DriveTime	\$652	+1%
Shine Armor	\$619	-49%

Health & Fitness		
	Spend (000)	%WoW
Total	\$24,227	-12%
Weight Watchers	\$1,810	N/A
Noom	\$1,727	-37%
Beachbody On Demand	\$1,591	-13%

Financial		
	Spend (000)	%WoW
Total	\$17,512	-13%
Chase Bank	\$2,930	+50%
Rocket Mortgage	\$1,504	-28%
Experian Boost	\$1,256	+3%

TOP ADVERTISERS CATEGORIES WITH MOST WOW DECREASES



Electronics & Software, though down overall, does have some bright spots among brands looking to target consumer' at-home computer set-ups and security.

Education		
	Spend (000)	%WoW
Total	\$7,694	-15%
WGU	\$1,065	-6%
SNHU	\$955	+5%
University of Phoenix	\$864	-39%

Miscellaneous		
	Spend (000)	%WoW
Total	\$17,823	-15%
PetSmart	\$1,053	-10%
Tommy John	\$1,037	-8%
Apoquel	\$812	+16%

Electronics & Software		
	Spend (000)	%WoW
Total	\$8,249	-35%
Portal from Facebook	\$2,581	+34%
Norton360 with Lifelock	\$945	+3%
Dell Technologies	\$862	+1052%

Entertainment & Events		
	Spend (000)	%WoW
Total	\$518	-84%
Trolls World Tour	\$250	-92%
Treasure Island	\$124	+41%
HGTV Giveaway	\$109	N/A