



TV VIEWERSHIP REVIEW:

MEDIA WEEK 14:
MARCH 30TH – APRIL 5TH



April 9, 2020

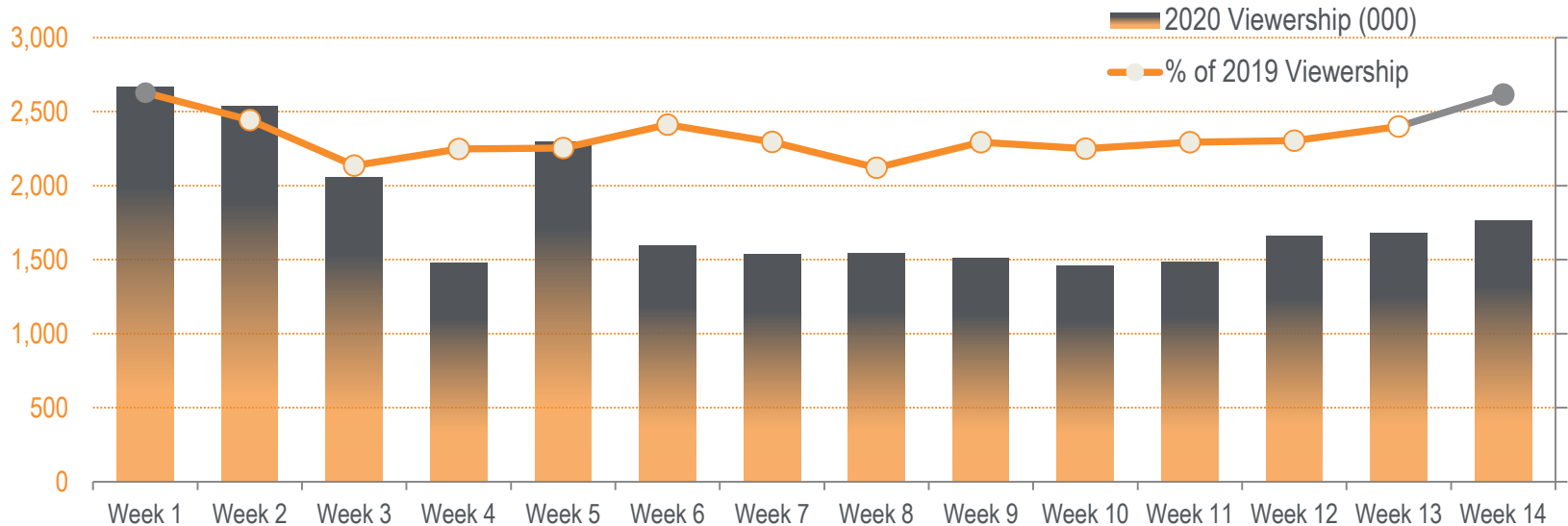
VIEWERSHIP DEEP DIVE



WEEKLY VIEWERSHIP TRENDS

While in 2019, Week 14 represented a drop in ratings, in 2020 we have continued to see growth in viewership ratings, putting 2020 viewership now above that of 2019.

Average Number of Weekly Viewers

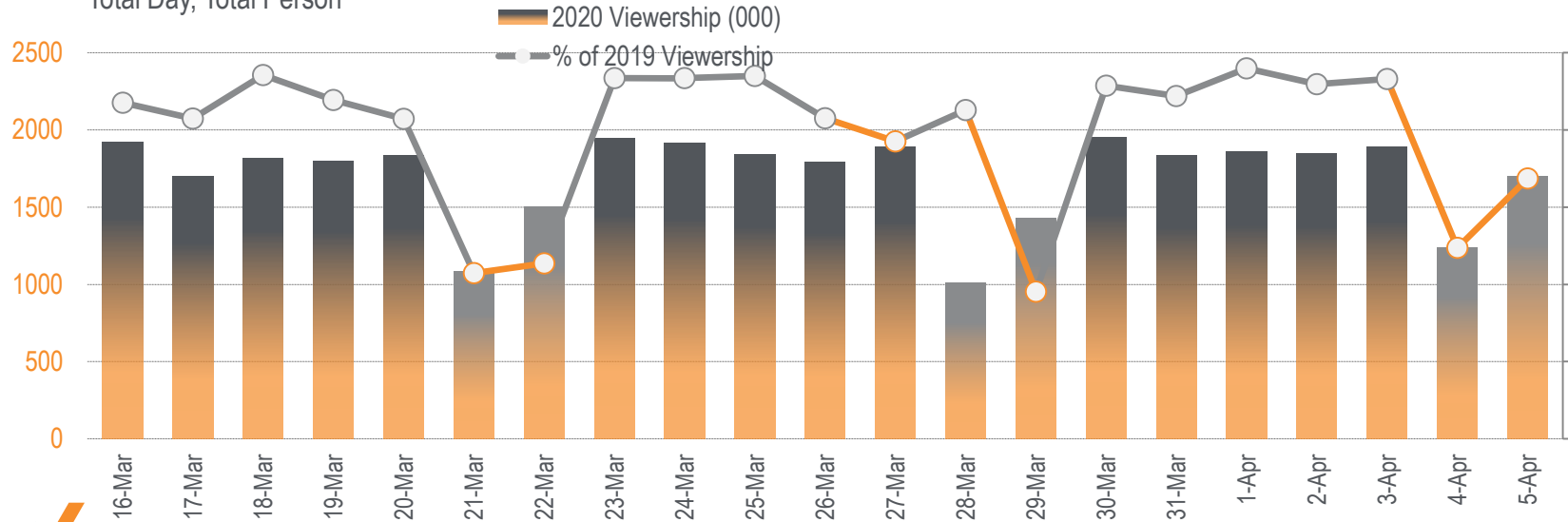


DAILY VIEWERSHIP TRENDS

Patterns are starting to emerge as viewership levels in 2020 continue to surpass those of 2019 during the weekday and generally fall during the weekend.

United States TV Usage

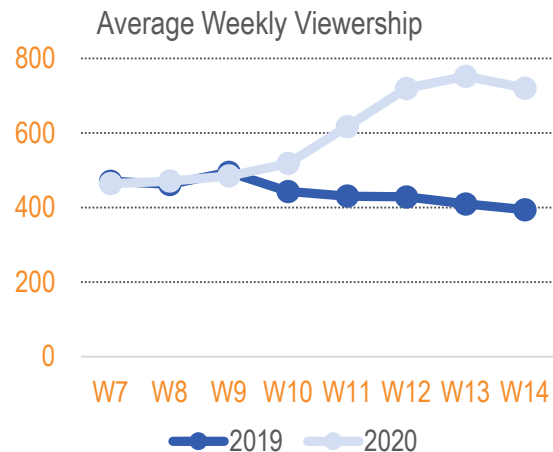
Total Day, Total Person



NETWORK GENRE PERFORMANCE

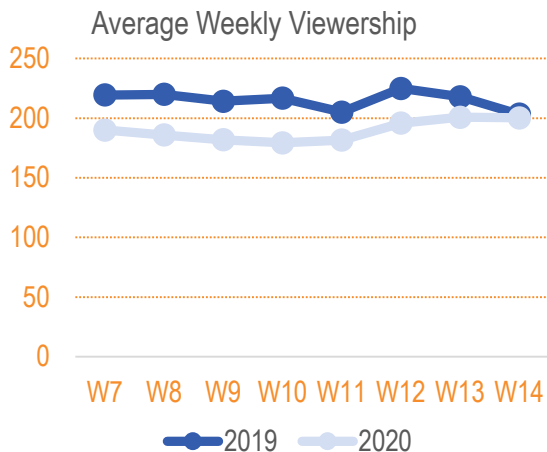


News and Lifestyle networks are continuing the trend of higher weekly viewership in 2020. Entertainment may soon join as viewership levels between 2019 and 2020 converge in week 14.



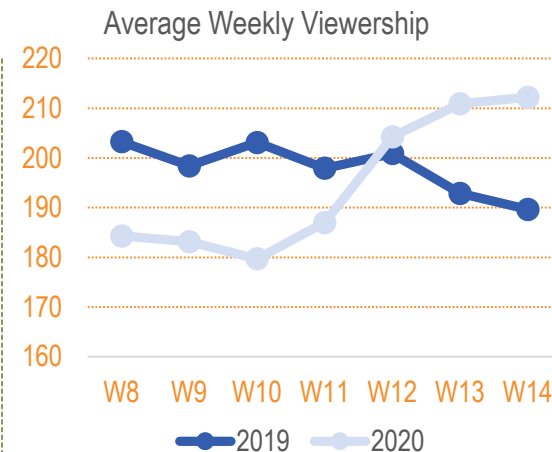
News Networks

BBC America; CNBC; CNN; FOX Business; FOX News; Headline News; MSNBC; Weather



Entertainment News

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



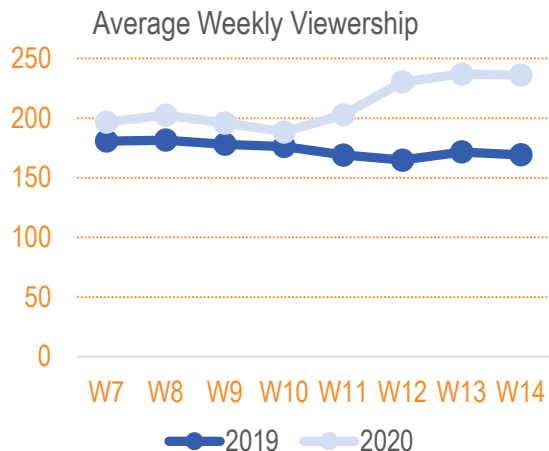
Lifestyle Networks

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

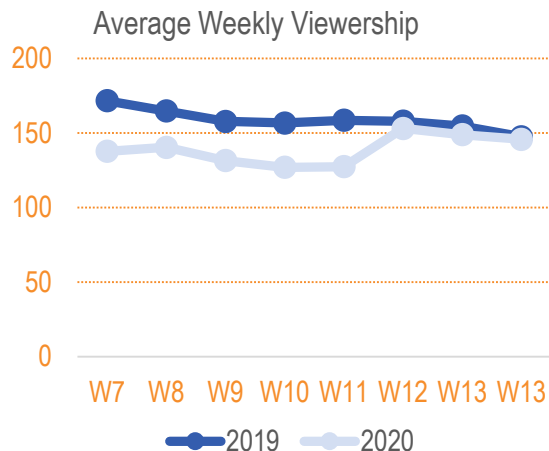
NETWORK GENRE PERFORMANCE



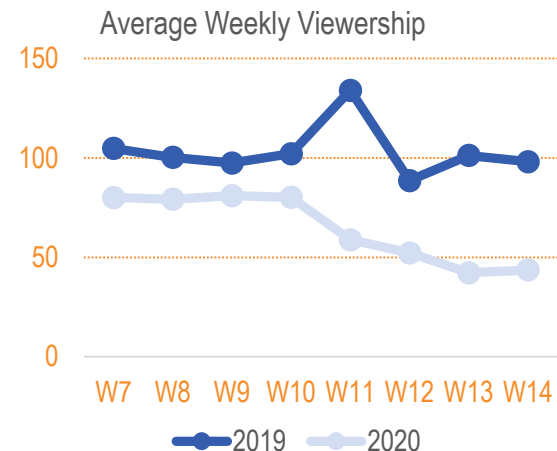
Trending in kids/family and sports networks are likely to stay the course in the coming weeks as there aren't any signs yet of schools or sports reopening



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



Kids & Family Networks
 BABYFIRST; BOOMERANG; DISNEY; DISNEY JR; FAMILY
 ENTERTAINMENT; FREEFORM; HALLMARK; NICK; NICK JR;
 NICKTOON; TEEN NICK; UNI KIDS



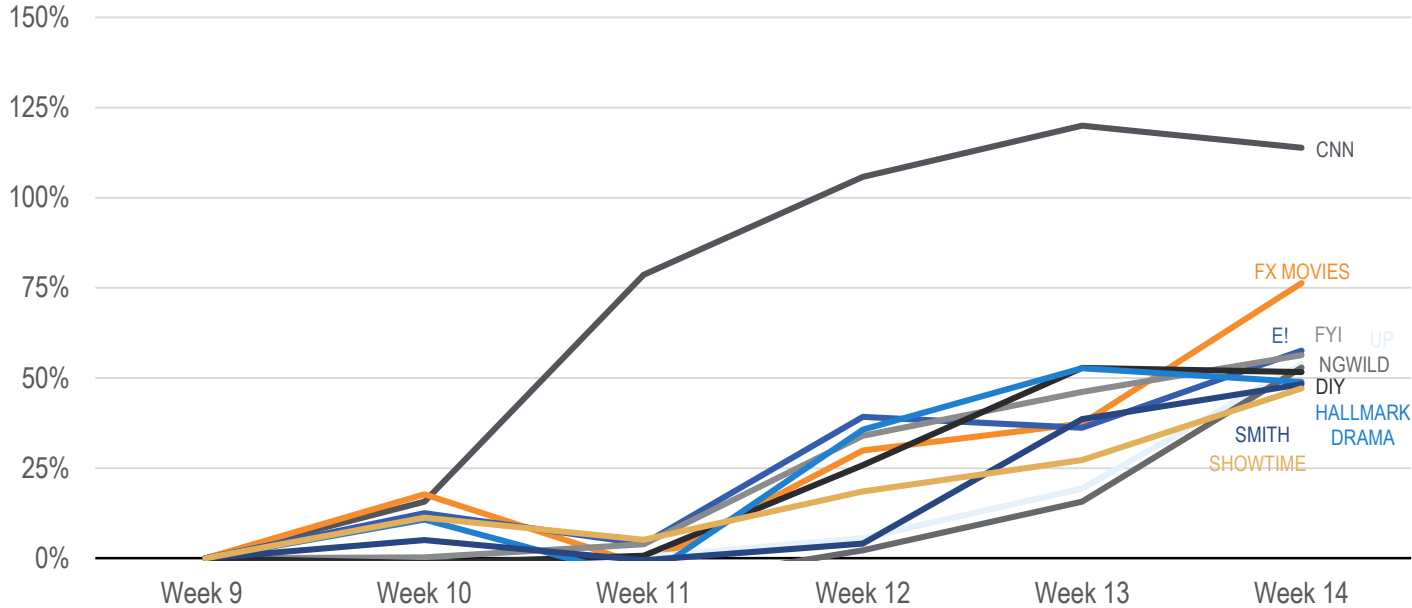
Sports Networks
 BEIN; BEIN HISP; ESPNL ESPN DEP; ESPN2; FOX
 SPORTS 1; FOX SPORTS 2; GOLF; MLBTV; NBATV;
 NBC SPORTS; NFL NETWORK; TENNIS



TOP MONTH-OVER-MONTH CHANGE

CNN has maintained growth in the last 6 weeks that far outpaces any other channels.
This week, we see real growth among movie channels as new programming is limited.

Average Viewership, Change in the 6 Weeks



| Channel | Average Viewership this week (000) |
|----------------|------------------------------------|
| CNN | 1,423 |
| FX Movies | 105 |
| E! | 184 |
| FYI | 97 |
| UP | 102 |
| NatGeo Wild | 197 |
| DIY | 146 |
| Hallmark Drama | 73 |
| Smithsonian | 88 |
| Showtime | 53 |

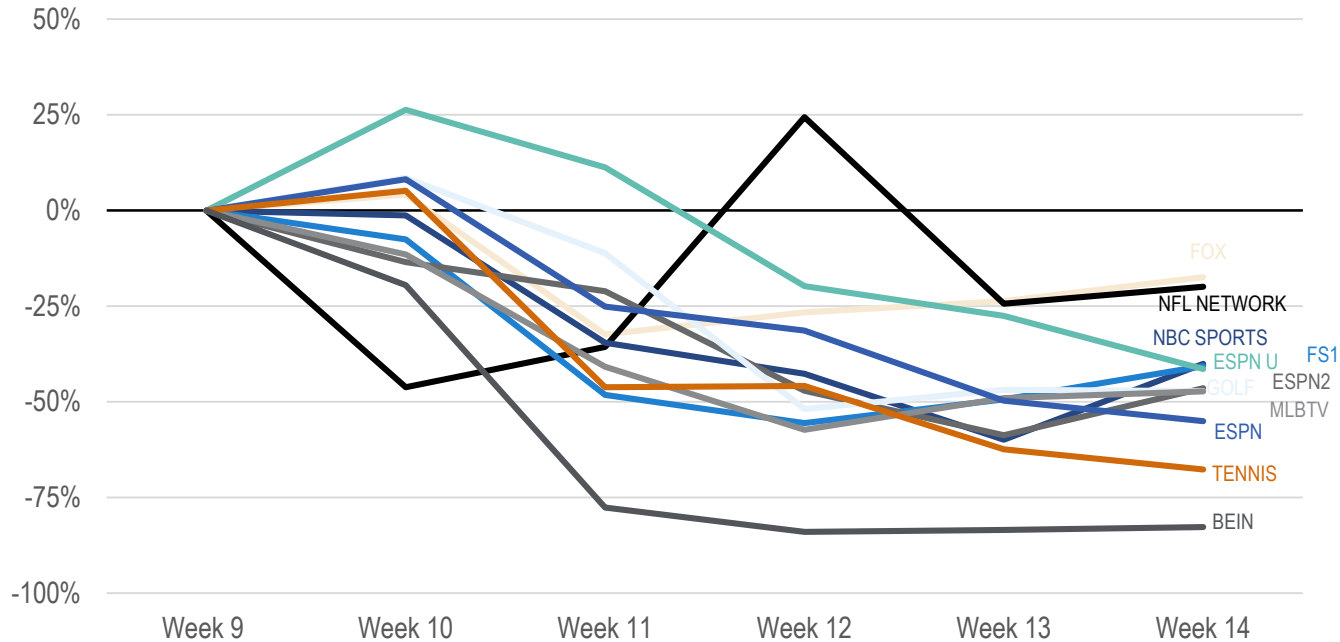
Source: Nielsen National TV Ratings

BOTTOM MONTH-OVER-MONTH CHANGE

Sports networks continue to occupy nearly all of the bottom spots here.



Average Viewership, Change in the Last Month



| Channel | Average Viewership this week (000) |
|--------------|------------------------------------|
| FOX | 253 |
| NFL NETWORK | 62 |
| NBC SPORTS | 62 |
| FOX SPORTS 1 | 71 |
| ESPN U | 14 |
| ESPN2 | 75 |
| GOLF | 41 |
| MLBTV | 33 |
| ESPN | 206 |
| TENNIS | 11 |
| BEIN | 4 |

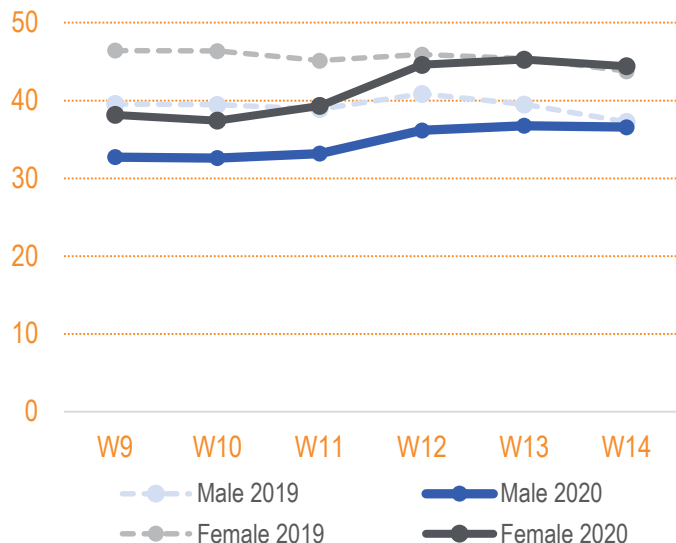
Source: Nielsen National TV Ratings

DEMO REVIEW: GENDER

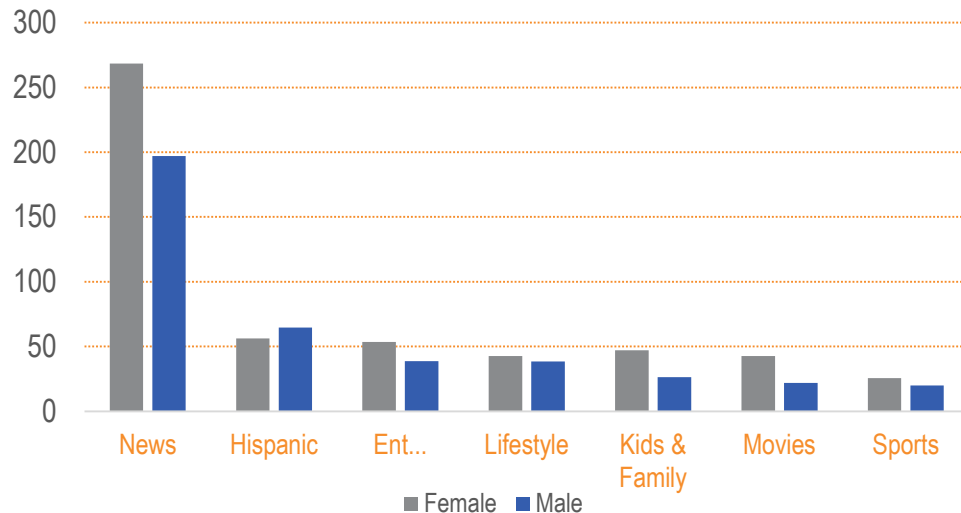


Women have been quicker to adjust and surpass 2020 viewership levels but men are now catching up, matching their 2019 levels this week.

Viewership Trends by Gender



Network Genre by Gender

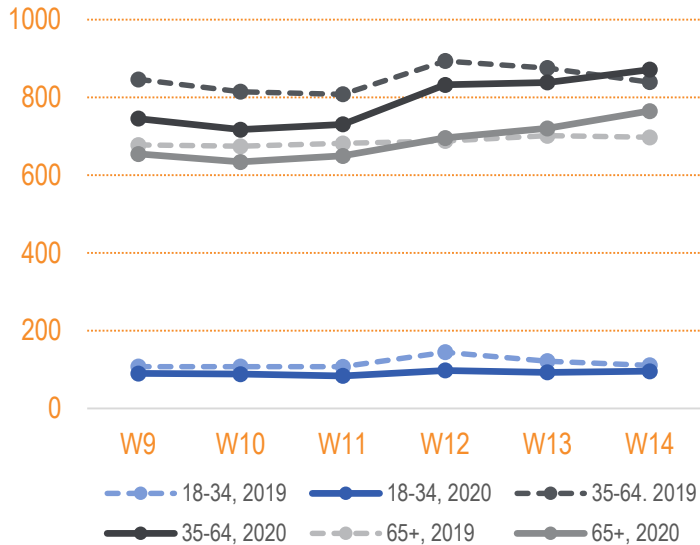


DEMO REVIEW: AGE

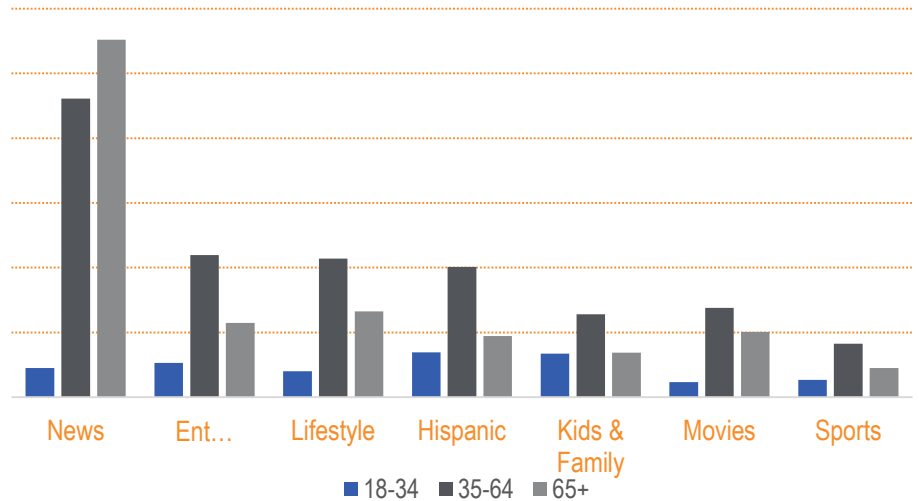


Adults 35-64 have seen the largest changes in viewership as younger and older viewers somewhat maintain their same linear viewing habits.

Viewership Trends by Age



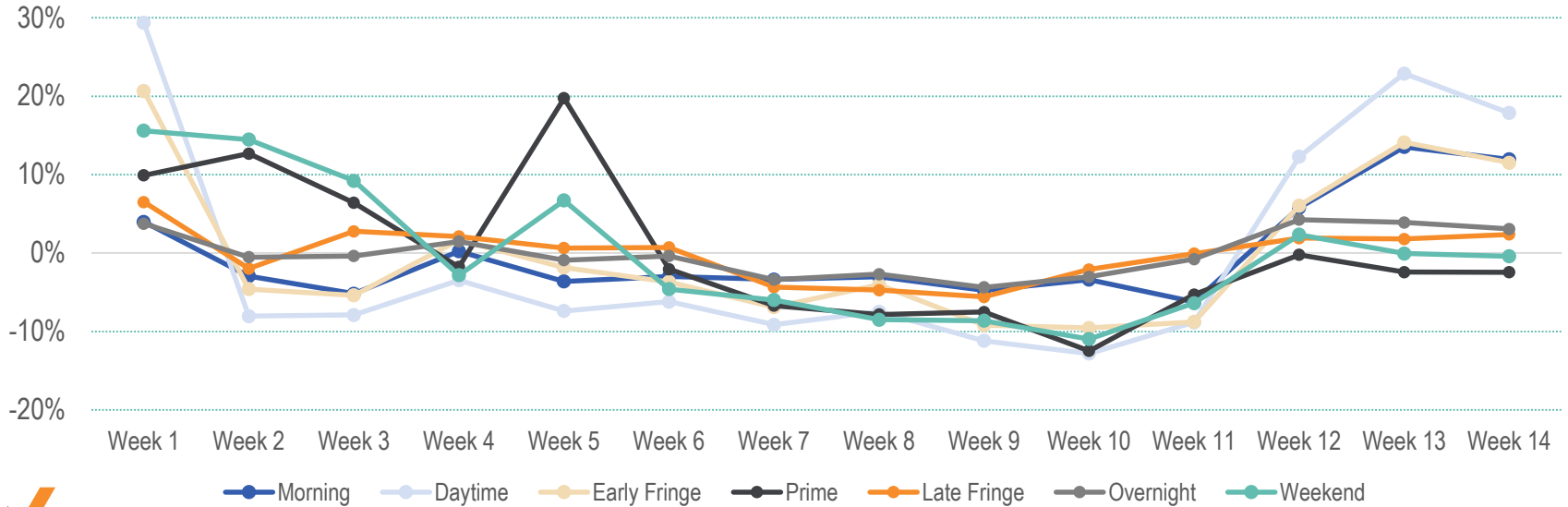
Network Genre by Age



DAYPART TRENDS

The last couple weeks have performed far above average in Morning, Daytime and Early Fringe, as people are now spending these hours at home. Interestingly, during dayparts when people are regularly home, like Prime and Weekend, viewership has actually been below average.

% Difference from 2020 Daypart Average



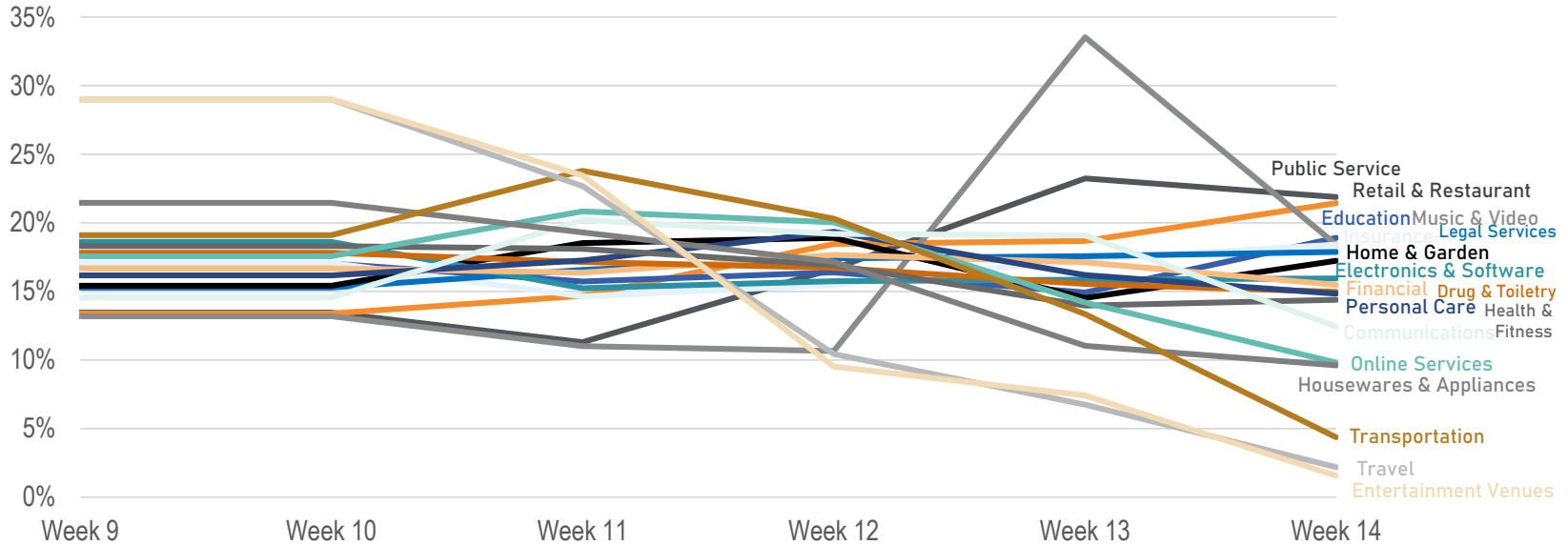


ADVERTISER TRENDS

ADVERTISER CATERGORIES' RESPONSES

Travel & Entertainment Venues have continued to decrease airings week-over-week. Retail & Restaurants, and Education increase airings as consumers start to establish their new normal.

Distribution of Airings over the Last 6 Weeks, by Category



TOP ADVERTISERS IN GROWING CATEGORIES



Online education continues to increase airings in a bid to take advantage of consumers extra time. Food delivery and delivery inclined restaurants are also increasing spend for people who are less likely to grocery shop and cook.

| Education | | |
|-------------------------|--------------|-------|
| | # of Airings | %WoW |
| Total | 9696 | +27% |
| University of Phoenix | 1571 | +161% |
| Independence University | 1429 | +60% |
| Masterclass | 1008 | -26% |

| Home & Garden | | |
|---------------|--------------|------|
| | # of Airings | %WoW |
| Total | 18310 | +19% |
| Home Light | 2416 | +8% |
| Ace Hardware | 1506 | N/A |
| Zillow | 939 | -16% |

| Miscellaneous | | |
|------------------|--------------|-------|
| | # of Airings | %WoW |
| Total | 43422 | +18% |
| GrubHub.com | 2441 | +21% |
| Stamps.com | 2070 | +15% |
| Pillsbury Grands | 1839 | +122% |

| Retail, Restaurant & Food Venue | | |
|---------------------------------|--------------|------|
| | # of Airings | %WoW |
| Total | 32197 | +15% |
| Domino's | 5013 | +85% |
| Little Caesars Pizza | 3678 | +24% |
| Burger King | 2740 | +47% |

TOP ADVERTISERS IN CATEGORIES WITH SLIGHT GROWTH



In the categories below, advertisers' spend level can vary depending upon their position in the industry and seeing opportunities as circumstances change. Noom and Calm are increasing airings as consumers look for a new way to manage their health and keep calm during the crisis.

| Insurance | | |
|----------------|--------------|------|
| | # of Airings | %WoW |
| Total | 44971 | +6% |
| Liberty Mutual | 6156 | +8% |
| Geico | 4848 | -24% |
| Progressive | 4601 | +7% |

| Health & Fitness | | |
|------------------------|--------------|------|
| | # of Airings | %WoW |
| Total | 31645 | +3% |
| Nugenix Total-T | 2267 | +17% |
| Noom | 1428 | +97% |
| FreeStyle Libre 14 Day | 1190 | N/A |

| Legal Services | | |
|----------------------|--------------|------|
| | # of Airings | %WoW |
| Total | 7189 | +2% |
| Roundup ~ GLN | 1472 | +51% |
| Mesothelioma ~ MRHFM | 1133 | -13% |
| Earplug ~ TJ Henry | 642 | -4% |

| Electronics & Software | | |
|------------------------|--------------|------|
| | # of Airings | %WoW |
| Total | 17798 | +1% |
| Calm | 2126 | +14% |
| ibotta | 2110 | +7% |
| NordVPN | 1641 | -12% |

TOP ADVERTISERS IN CATEGORIES WITH SOME DECREASES



Advertisers in broad categories seem to be wary of the current customer consumer environment. Interestingly, despite the education category overall pulling back, online education providers Masterclass & Independence University have increased airings.

Drug & Toiletries

| | # of Airings | %WoW |
|------------|--------------|------|
| Total | 23895 | -4% |
| GoodRX.com | 6629 | 30% |
| Humira | 2684 | 254% |
| Neuriva | 1645 | 45% |

Public Services

| | # of Airings | %WoW |
|--------------------|--------------|------|
| Total | 20919 | -6% |
| US Census 2020 | 3395 | +33% |
| #Alone Together | 2819 | +22% |
| American Red Cross | 1282 | -24% |

Beauty, Hygiene & Personal Care

| | # of Airings | %WoW |
|-------------------|--------------|------|
| Total | 10409 | -8% |
| Keeps | 1517 | +19% |
| hims | 1366 | -6% |
| Dollar Shave Club | 1262 | +6% |

Financial

| | # of Airings | %WoW |
|--------------|--------------|------|
| Total | 26095 | -10% |
| Chime | 3814 | 2% |
| Nerd Wallet | 1699 | 2% |
| JG Wentworth | 1311 | 77% |

TOP ADVERTISERS IN DOWN CATEGORIES



Certain houseware & appliance advertisers are hoping any remaining spend in durable goods will be towards their vertical. On the other hand, online services, communications and music & video have all pulled back from last week.

| Housewares & Appliances | | | Online Service & Shopping | | | Communications | | | Music & Video | | |
|----------------------------|--------------|-------|---------------------------|--------------|------|----------------|--------------|------|-------------------|--------------|------|
| | # of Airings | %WoW | | # of Airings | %WoW | | # of Airings | %WoW | | # of Airings | %WoW |
| Total | 4183 | -13% | Total | 7310 | -31% | Total | 7148 | -35% | Total | 1131 | -45% |
| Bissell Cordless Max | 905 | +350% | Experian Boost | 1697 | -34% | GoDaddy | 2113 | -21% | Amazon Music | 685 | -60% |
| GraniteStone / GraniteRock | 374 | +1% | Touch Of Modern | 1012 | 0% | Dish Network | 919 | +2% | Trolls World Tour | 322 | N/A |
| Mighty Sight | 367 | +62% | thredUP | 904 | N/A | AT&T TV | 631 | -28% | MTV Push | 123 | -57% |

TOP ADVERTISERS IN **VERY DOWN CATEGORIES**



As some of the hardest hit categories, advertisers in transportation, travel, and entertainment are unsurprisingly continuing to decrease their number of airings. This will most likely continue until quarantines are lifted.

Transportation (Sales and Repair)

| | # of Airings | %WoW |
|-----------------------|--------------|------|
| Total | 1875 | -67% |
| Indian Motorcycle | 441 | +93% |
| Endurance Repair Ins. | 293 | -14% |
| CarGurus | 192 | -52% |

Travel, Vacation & Hotel

| | # of Airings | %WoW |
|-------------------|--------------|------|
| Total | 913 | -68% |
| Low Cost Airlines | 522 | -18% |
| SmartFares | 210 | -1% |
| Hotels.com | 47 | -96% |

Entertainment Venues

| | # of Airings | %WoW |
|---------------------------|--------------|------|
| Total | 66 | -79% |
| BET Experience 19 | 37 | -77% |
| Pro Football Hall Of Fame | 22 | -71% |
| Spartan Mowers | 3 | -25% |