



TV VIEWERSHIP REVIEW:

MEDIA WEEK 15:
APRIL 6TH – APRIL 12TH



April 17, 2020



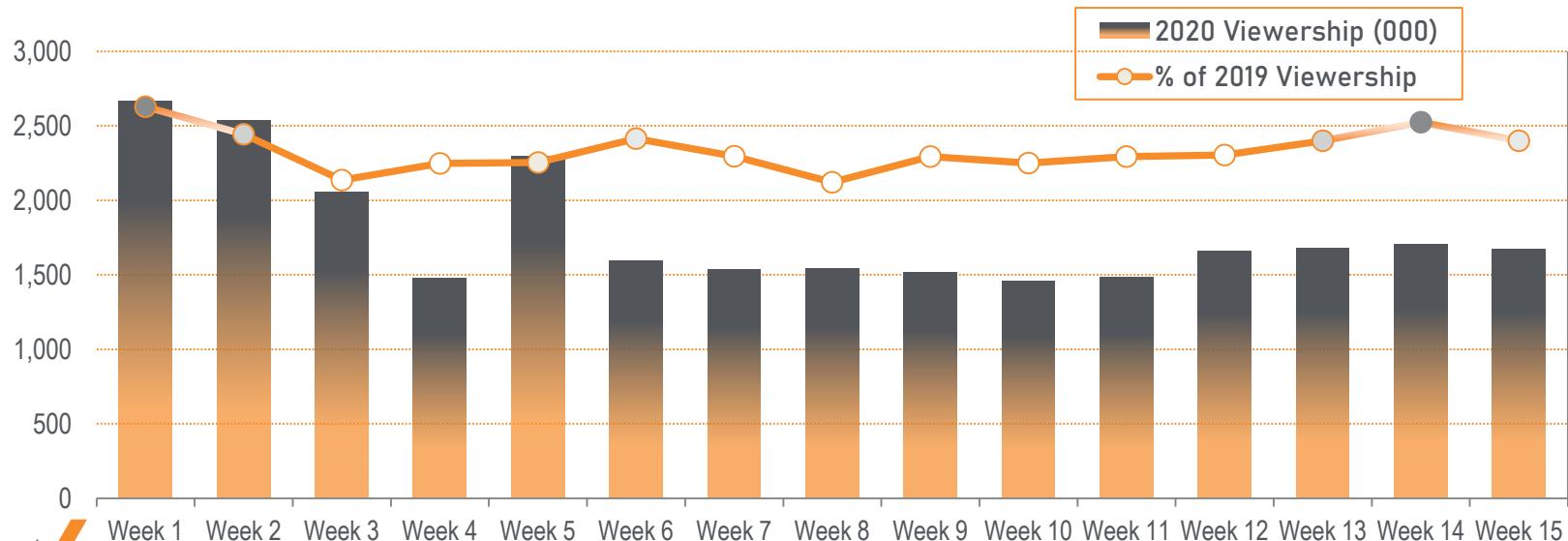
VIEWERSHIP DEEP DIVE



WEEKLY VIEWERSHIP TRENDS

After surpassing 2019 Week 14, viewership has declined slightly in Week 15, though it has remained at near 2019 levels

Average Number of Weekly Viewers



Source: Nielsen National TV Ratings

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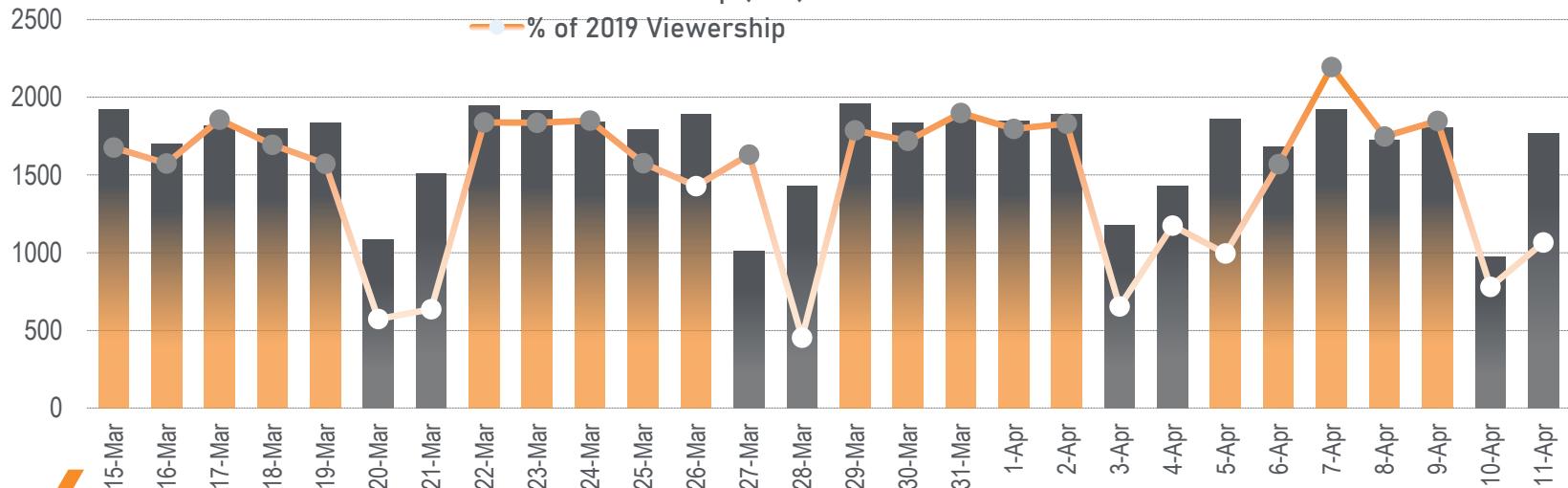
DAILY VIEWERSHIP TRENDS

Weekday viewership continued to perform above expectation, with a peak on Wednesday of last week. Weekends have seen major drops in viewership in the last 4 weeks.

United States TV Usage

Total Day, Total Person

2020 Viewership (000)
% of 2019 Viewership



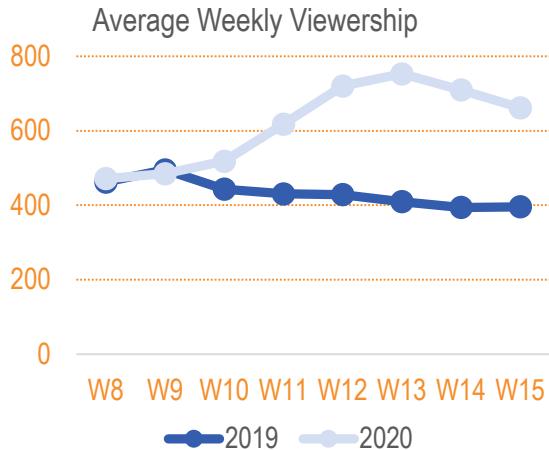
Source: Nielsen National TV Ratings

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NETWORK GENRE PERFORMANCE

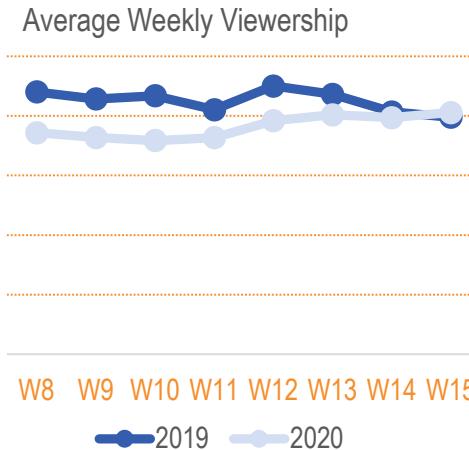


Though still far above 2019 levels, News viewership has dropped somewhat over the last couple weeks, as the amount of new information about COVID-19 has slowed down. Lifestyle networks, on the other hand, have continued to see gains.



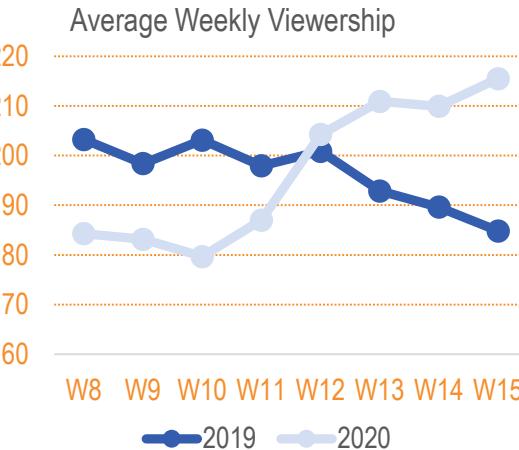
News Networks

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



Entertainment News

A&E; Adult Swim; American Heroes; AXS; BET; BET Her; BOUNCE; CARTOON; CEDXD; 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



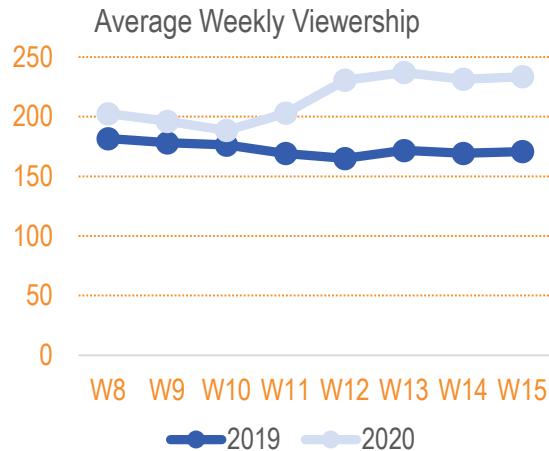
Lifestyle Networks

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

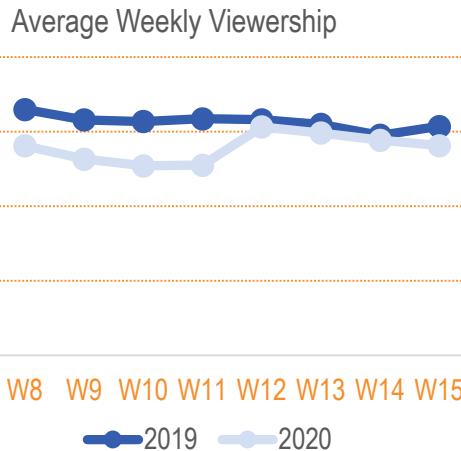


Viewership for Hispanic Networks, and Sports Networks have all flattened over the last few weeks as people settle into their new routines, without live sports.



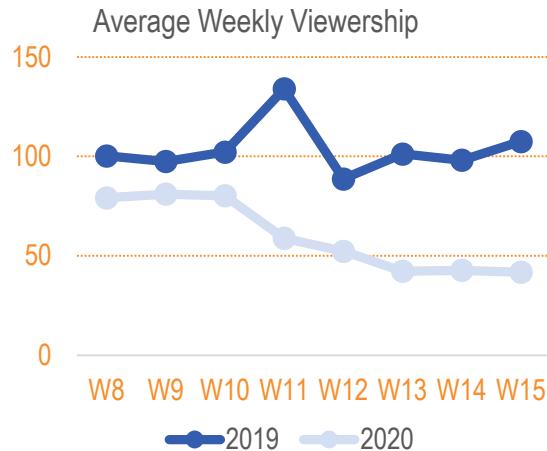
Hispanic Networks

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

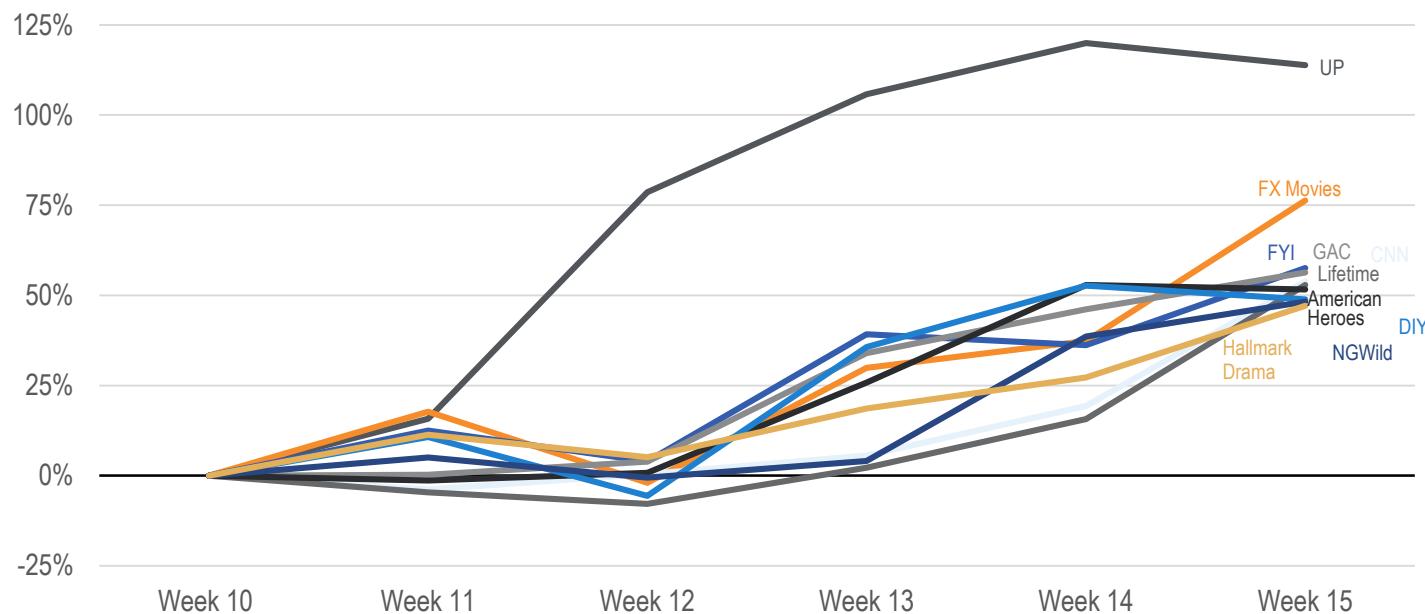
BEIN; BEIN HISP; ESPN; ESPN DEP; ESPN2; FOX
SPORTS 1; FOX SPORTS 2; GOLF; MLBTV; NBATV;
NBC SPORTS; NFL NETWORK; TENNIS

TOP MONTH-OVER-MONTH CHANGE



UP (focused on uplifting Christian programming) has had the most growth since Week 10 as many are not attending service in person. Lifestyle networks have also seen big boosts over the last few weeks.

Average Viewership, Change in the 6 Weeks



Channel	Average Viewership this week (000)
UP	117
FX Movies	125
FYI	102
Great American Country	66
CNN	1,247
Lifetime	354
American Heroes	81
DIY	146
NatGeo Wild	188
Hallmark Drama	81

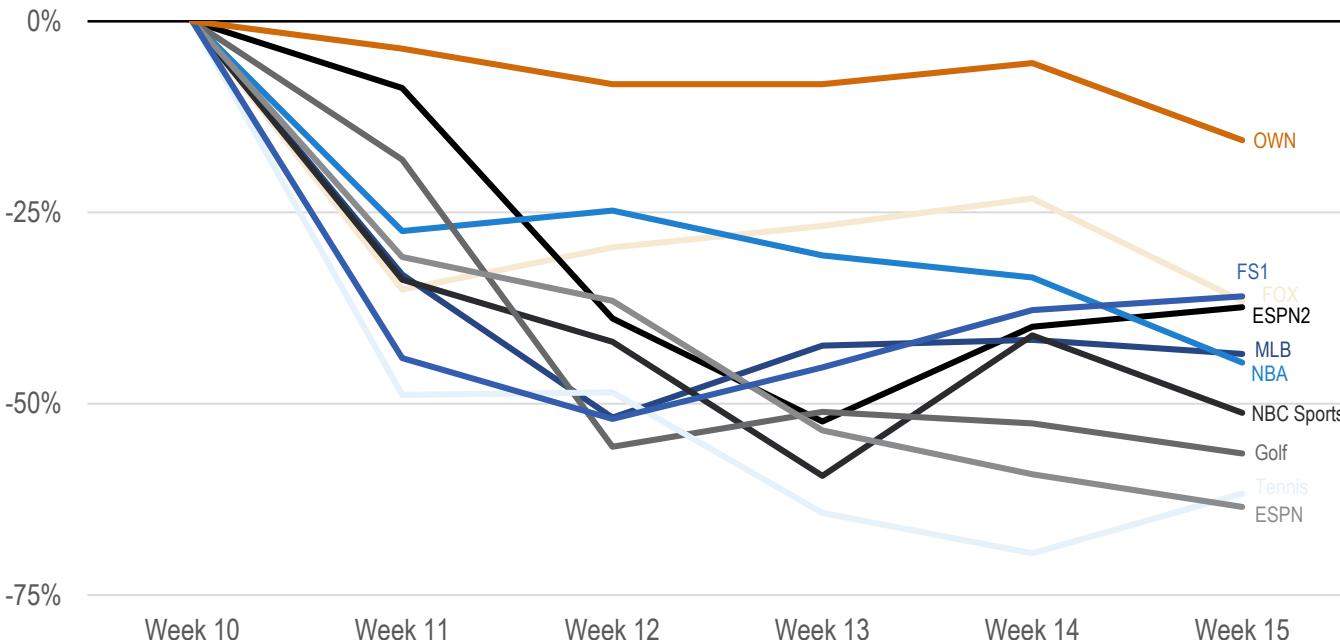
Source: Nielsen National TV Ratings

BOTTOM MONTH-OVER-MONTH CHANGE



With no live sports, sport networks continue to plummet in viewership. Interesting OWN has also struggled in the last week.

Average Viewership, Change in the Last Month



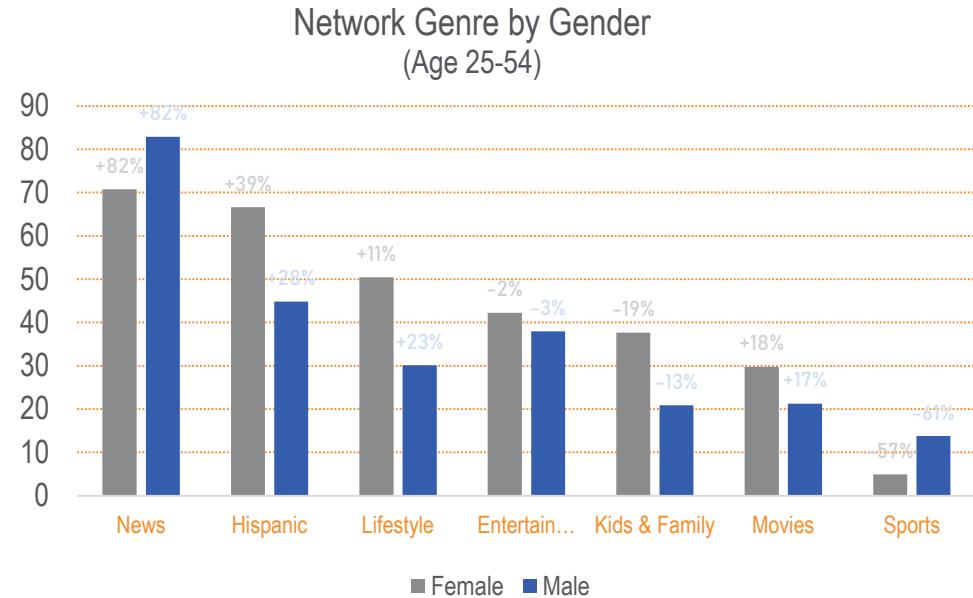
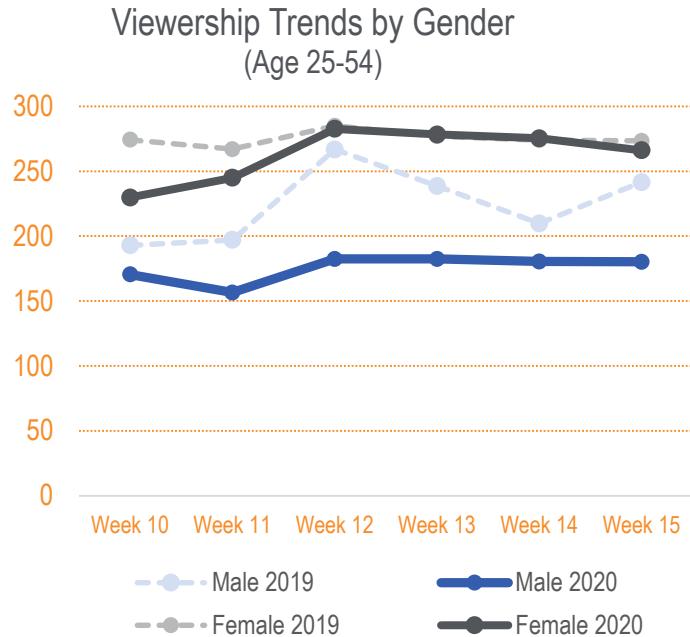
Channel	Average Viewership this week (000)
OWN	136
FOX Sports 1	71
FOX	203
ESPN2	76
MLBTV	31
NBATV	21
NBC Sports	50
Golf Channel	36
Tennis Channel	13
ESPN	182

Source: Nielsen National TV Ratings

DEMO REVIEW: GENDER



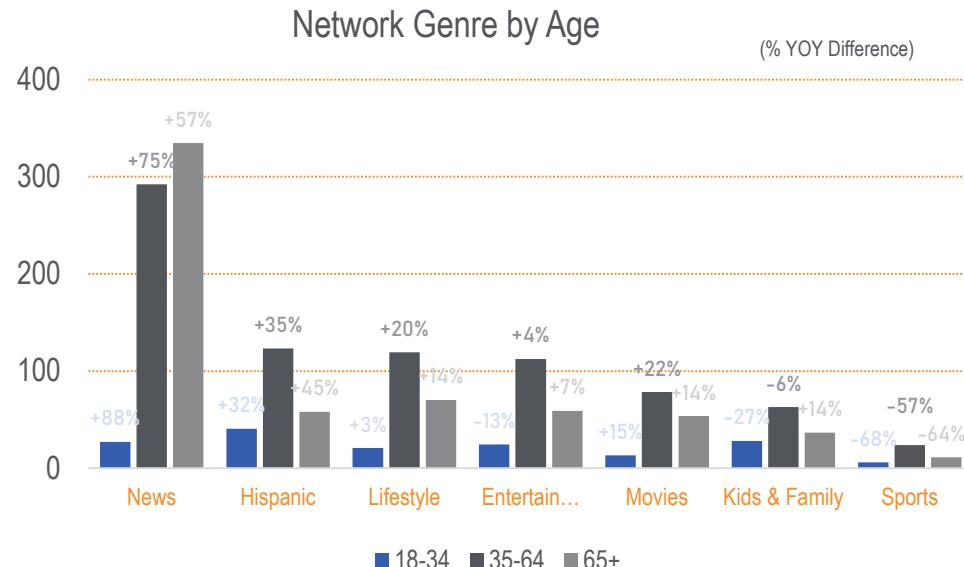
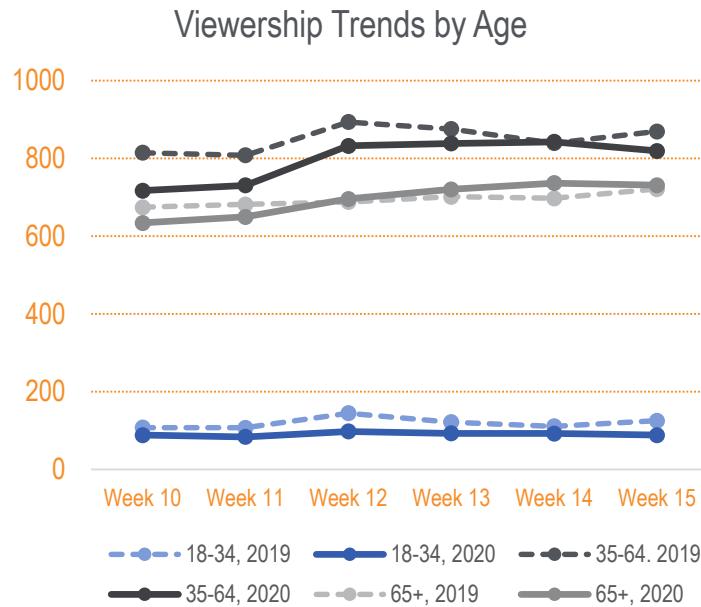
Females 25-54 have returned to 2019 viewership, with major growth coming from News, Hispanic, and Movie Networks. Whereas, male viewership remains lower than 2019, driven by lack of live sports.



DEMO REVIEW: AGE



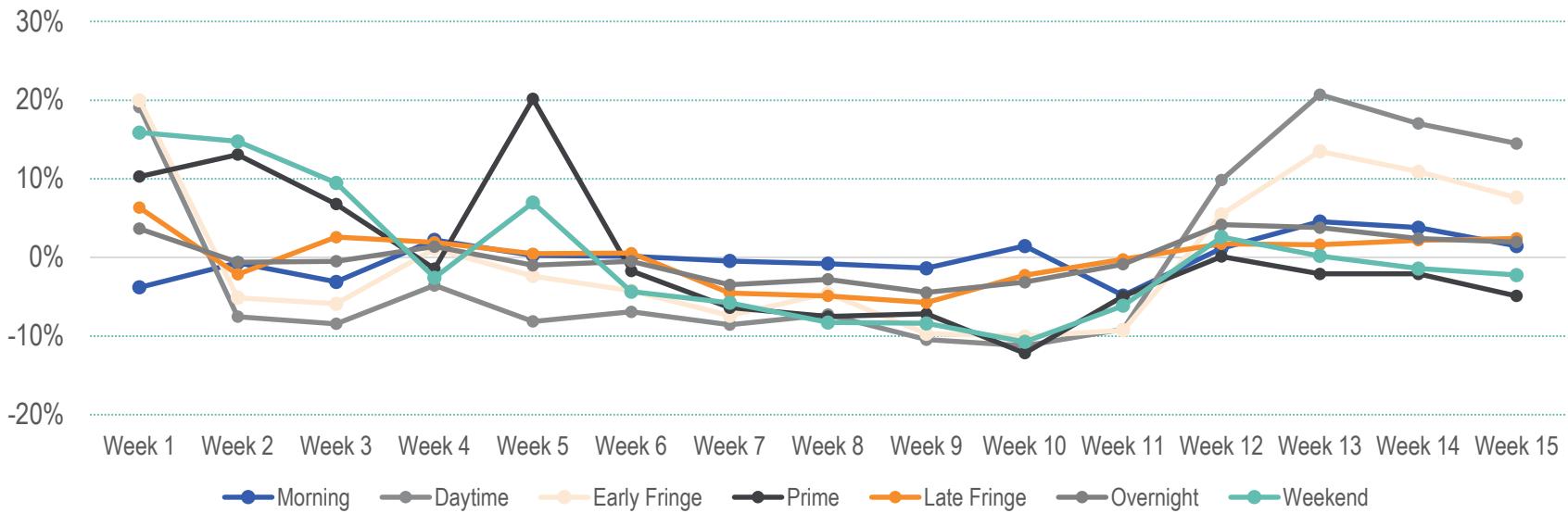
Adults over 65 have continued to watch TV at slightly higher levels than in 2019, but both 18-64 year-old viewership have dropped slightly since last week. Interestingly, while News is viewed most by those 65+, it is 18-34 year-olds that have increased News-viewing more year-over-year.



DAYPART TRENDS

Daytime and Early Fringe, though declining slightly in the last week, continue to outperform their average viewership. Prime and Weekend have instead continued to fall below their 2020 average.

% Difference from 2020 Daypart Average



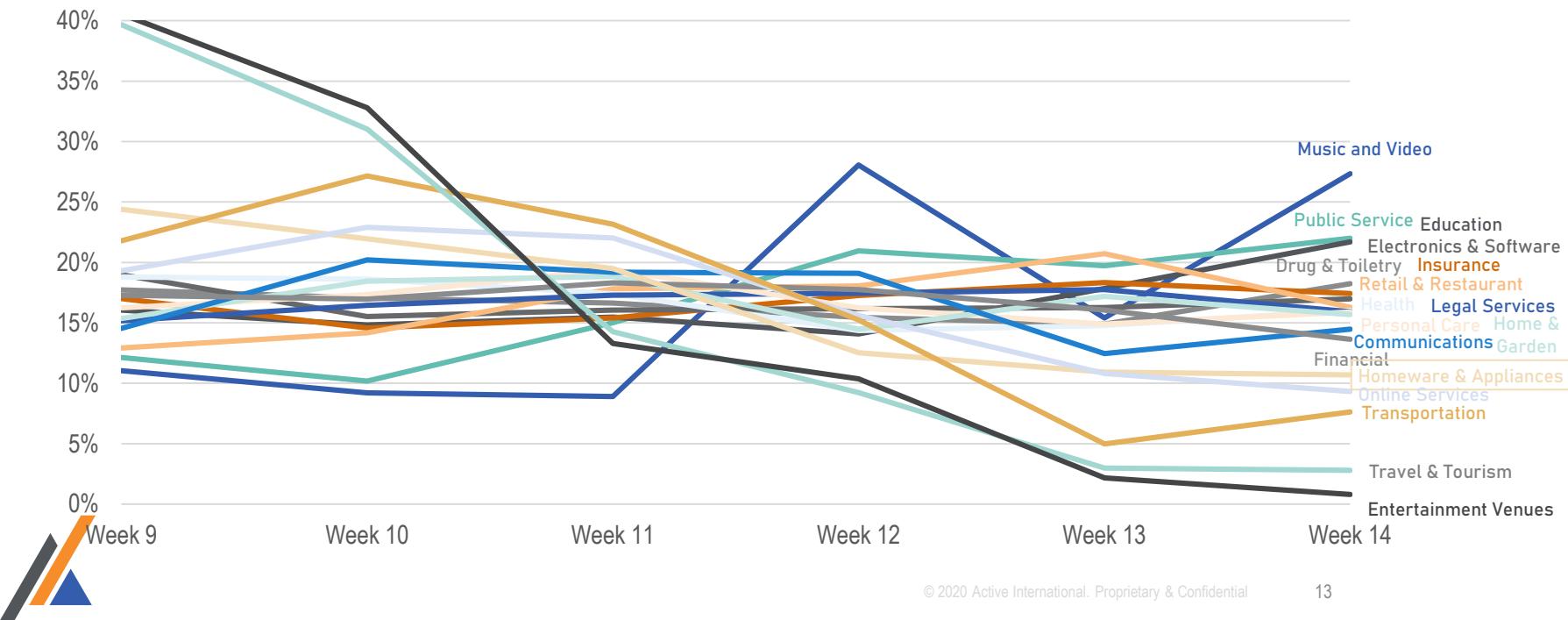


DR ADVERTISER **TRENDS**

ADVERTISER CATERGORIES' RESPONSES

Travel & Entertainment Venues not at fewer than 1000 weekly airings combined, it's no surprise they've continued to decline. Mainly other categories have stabilized in airing in the last 6 weeks.

Distribution of Airings over the Last 6 Weeks, by Category



TOP ADVERTISERS IN HIGH-INCREASE CATEGORIES



Driven by spending on the ad campaign for Trolls World Tour, Music & Video has seen the largest WoW growth, followed by Transportation, as Carvana.com makes a big push to be back on air pulling back previously. MasterClass and SNHU also drove growth in Education after previously pulling back.

Music & Video

	# of Airings	%WoW
Total	2006	+77%
Trolls World Tour	1709	+431%
MTV Push	136	+11%
Amazon Music	134	-80%

Transportation (Sales and Repair)

	# of Airings	%WoW
Total	2869	+53%
Carvana.com	1928	+2116%
Endurance Auto Rep. Ins.	282	-4%
Mahindra Roxor Offroad	212	N/A

Drug & Toiletries

	# of Airings	%WoW
Total	29294	+23%
GoodRX.com	6509	-2%
Humira	3012	+12%
Neuriva	1816	+10%

Education

	# of Airings	%WoW
Total	11791	+22%
Masterclass	2719	+170%
University of Phoenix	1468	-7%
SNHU	1245	+29%

TOP ADVERTISERS IN INCREASE CATEGORIES



Public Service remains a growing category as continued focus is put on informing the public on COVID-19. Noom also continued to grow in airings. Sling TV increased over 20-fold trying to reach new TV views. Whereas Dollar Shave has pulled back, as grooming has become less of a daily necessity for many.

Communications

	# of Airings	%WoW
Total	8316	+16%
GoDaddy	2284	+8%
AT&T	765	+37%
Sling Television	719	+2379%

Public Service

	# of Airings	%WoW
Total	23339	+12%
#Alone Together	3433	+22%
United States Census 2020	2182	-36%
American Red Cross	2065	+61%

Health & Fitness

	# of Airings	%WoW
Total	34319	+8%
Noom	3115	+118%
Nugenix Total-T	1996	-12%
Pataday	1500	N/A

Beauty, Hygiene & Personal Care

	# of Airings	%WoW
Total	11107	+7%
Keeps	1489	-2%
hims	1392	+2%
Dollar Shave Club	969	-23%

TOP ADVERTISERS IN STABLE CATEGORIES



Electronics & Software saw some WOW growth as the 30 Day Fitness App went on air last week.

Housewares & Appliances, and the Miscellaneous advertisers have remained pretty consistent, though Farmers Dog has upped airings as pe owners need a option that will deliver

Electronic & Software

	# of Airings	%WoW
Total	18594	+4%
NordVPN	1916	+17%
30 Day Fitness	1708	N/A
Calm	1510	-29%

Housewares & Appliances

	# of Airings	%WoW
Total	4089	-2%
Bissell Cordless Mac	1015	+12%
Mighty Sight	334	-9%
Granite Stone / Granite Rock	322	-14%

Miscellaneous

	# of Airings	%WoW
Total	42006	-3%
GrubHub.com	2359	-3%
Stamps.com	2205	+7%
The Farmers Dog	1757	+28%

TOP ADVERTISERS IN DECREASE CATEGORIES



Advertisers in these categories have also remained relatively stable WOW with their big adjustments (up or down) having already happened in prior weeks. In Home & Garden, real estate brand Home Light reduced airings, while Terminix increased airings as we move into spring.

Insurance

	# of Airings	%WoW
Total	42719	-5%
Liberty Mutual	5993	-3%
Geico	4606	-5%
Progressive	4279	-7%

Travel, Vacation and Hotel

	# of Airings	%WoW
Total	855	-6%
Low Cost Airlines	489	-6%
SmartFares	240	+14%
National Park Service	57	+24

Home & Garden

	# of Airings	%WoW
Total	16713	-9%
Home Light	1491	-38%
Terminix	1076	+113%
Wayfair.com	908	-2%

Legal Services

	# of Airings	%WoW
Total	6446	-10%
Mesothelioma ~ MRHFM	1094	-3%
Earplug ~ TJ Henry	704	+10%
Mesothelioma ~Sokolove	439	+41%

TOP ADVERTISERS IN HIGH-DECREASE CATEGORIES



Brands in these categories continued to pull back as consumer spending and confidence has fallen.

Jackson Hewitt, the Tax specialist have increase spending despite the tax deadline being moved back.

Sonic, the drive through, has also increased airings.

Online Services & Shopping

	# of Airings	%WoW
Total	6305	-14%
Experian Boost	1493	-12%
Touch of Modern	1047	+3%
Poshmark	750	+4%

Financial

	# of Airings	%WoW
Total	22179	-15%
Chime	2328	-39%
JG Wentworth	1245	-5%
Jackson Hewitt	1031	+92%

Retail, Restaurant & Food Venues

	# of Airings	%WoW
Total	25312	-21%
Domino's	4686	-7%
Little Caesars Pizza	3173	-14%
Sonic	2214	+193%

Entertainment Venues

	# of Airings	%WoW
Total	24	-64%
KPMG Women's PGA	18	N/A
Spartan Mowers	4	+33%
Pro Football Hall of Fame	2	-91%