



## TV VIEWERSHIP REVIEW:

MEDIA WEEK 14:  
MARCH 30<sup>TH</sup> – APRIL 5<sup>TH</sup>



April 9, 2020

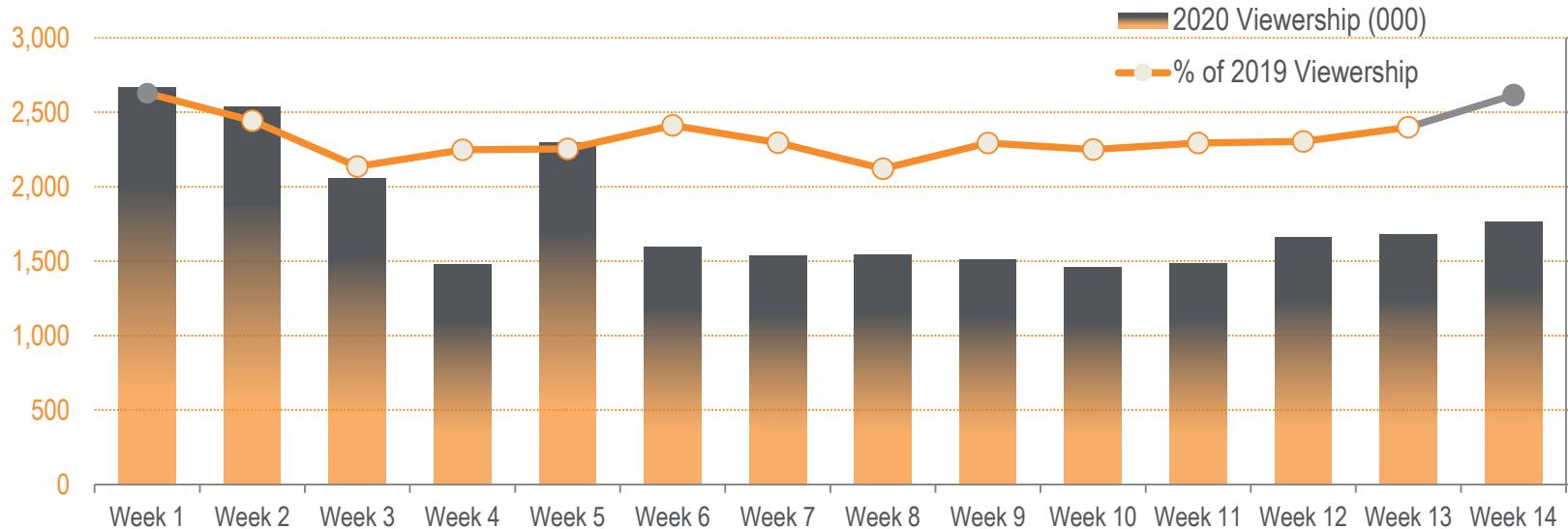
# VIEWERSHIP DEEP DIVE



# 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

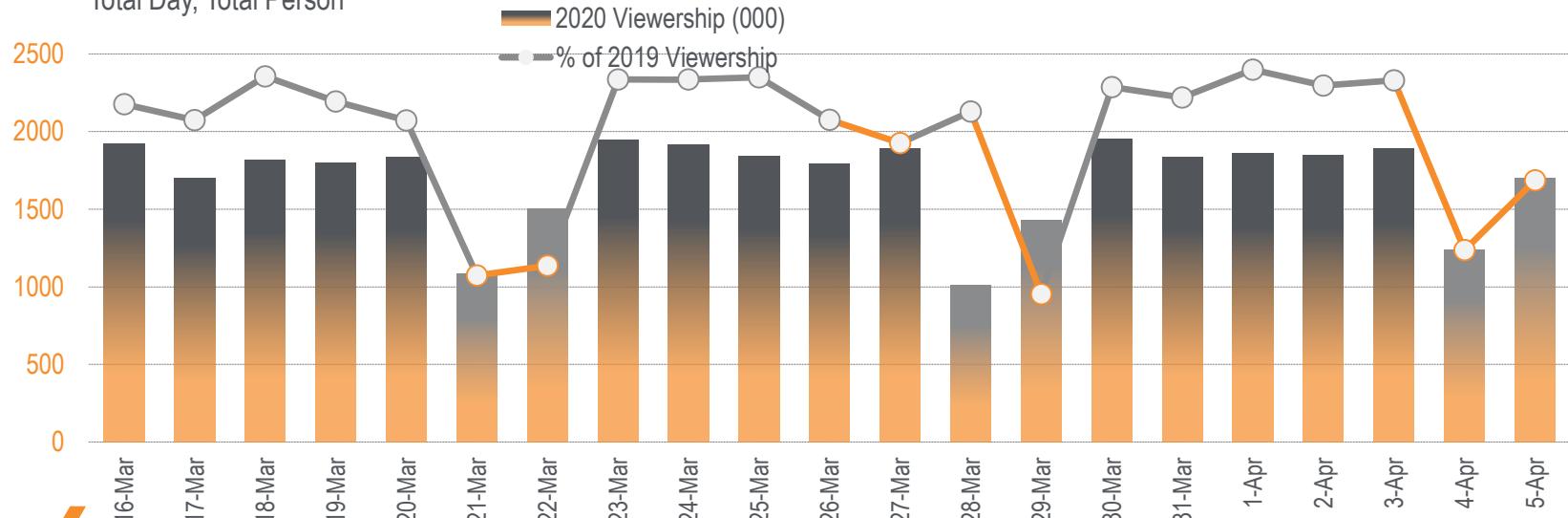


# DAILY VIEWERSHIP TRENDS

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

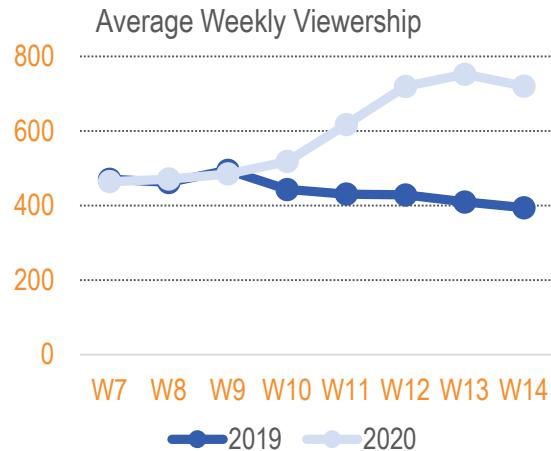
Total Day, Total Person



# NETWORK GENRE PERFORMANCE

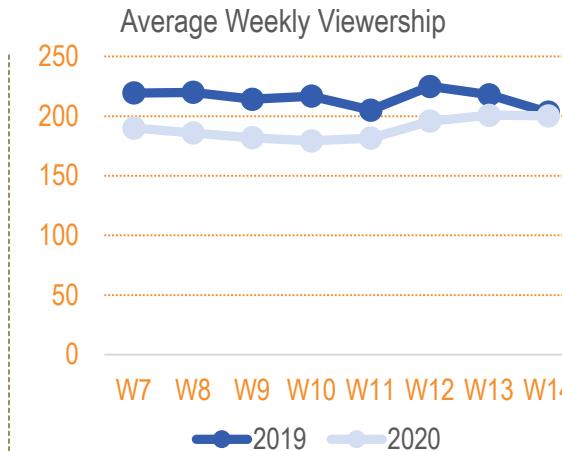


News and Lifestyle networks are continuing the trend of higher weekly viewership in 2020.  
Entertainment may soon join as viewership levels between 2019 and 2020 converge in week 14.



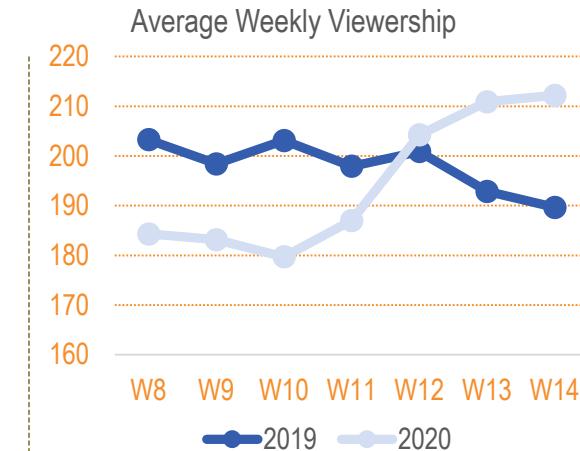
#### News Networks

BBC America; CNBC; CNN; FOX 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



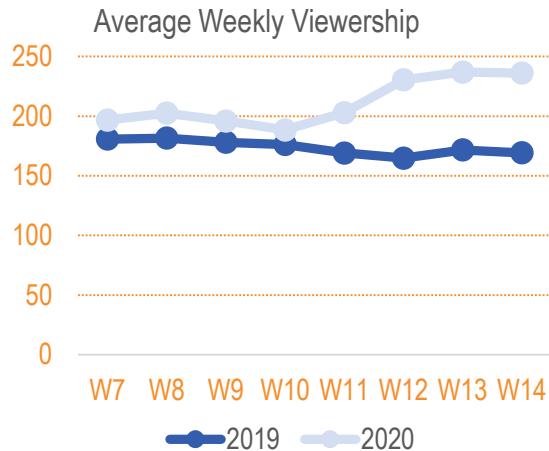
#### Lifestyle Networks

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

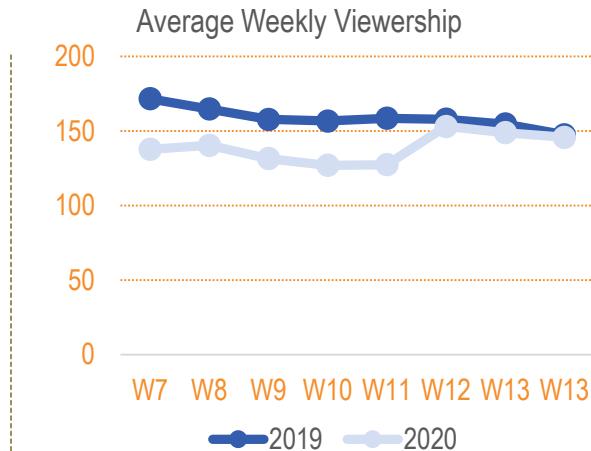


Trending in kids/family and sports networks are likely to stay the course in the coming weeks as there aren't any signs yet of schools or sports reopening



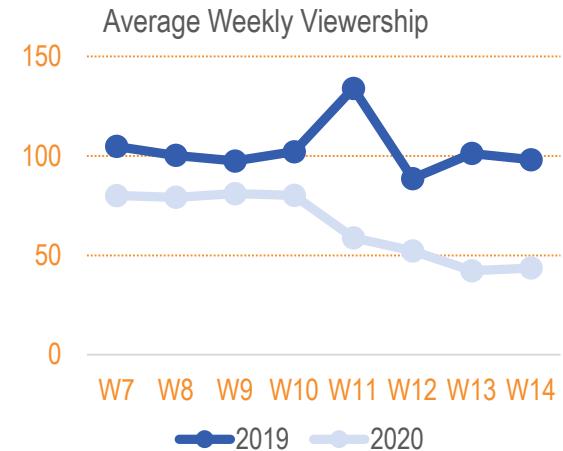
## Hispanic Networks

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



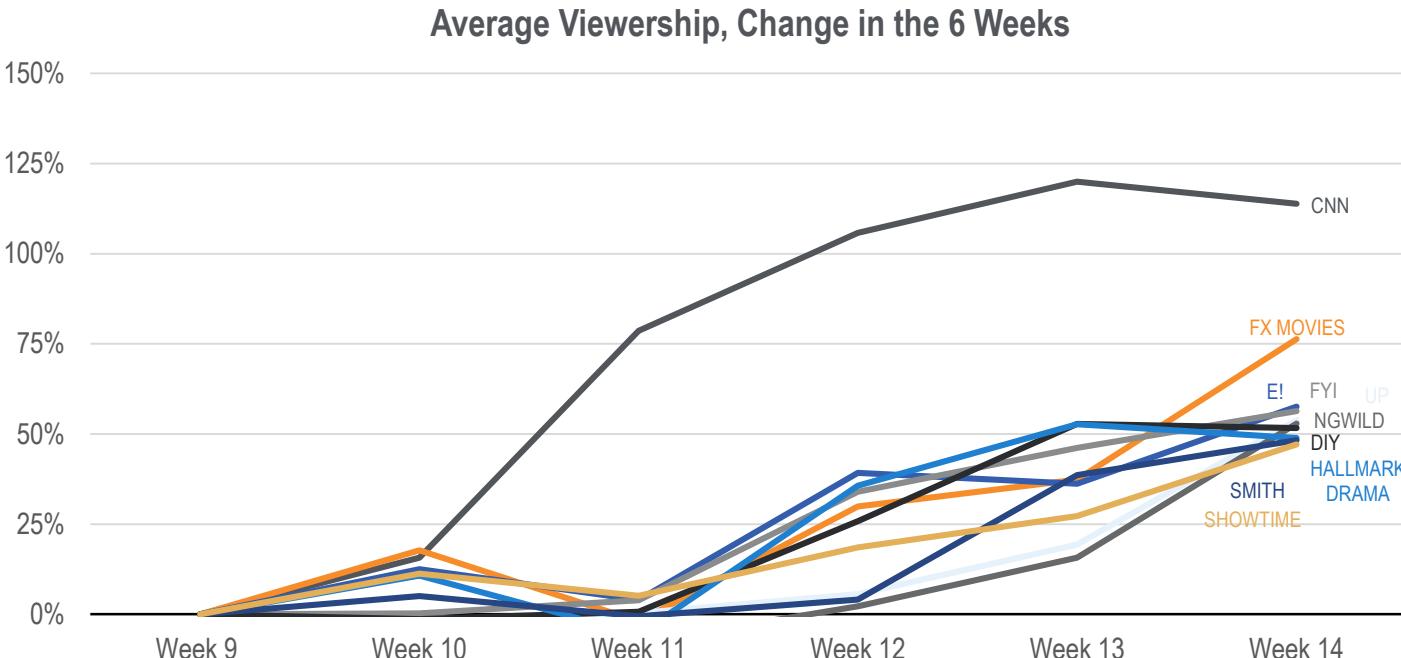
## Sports Networks

BEIN; BEIN HISP; ESPN; 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.



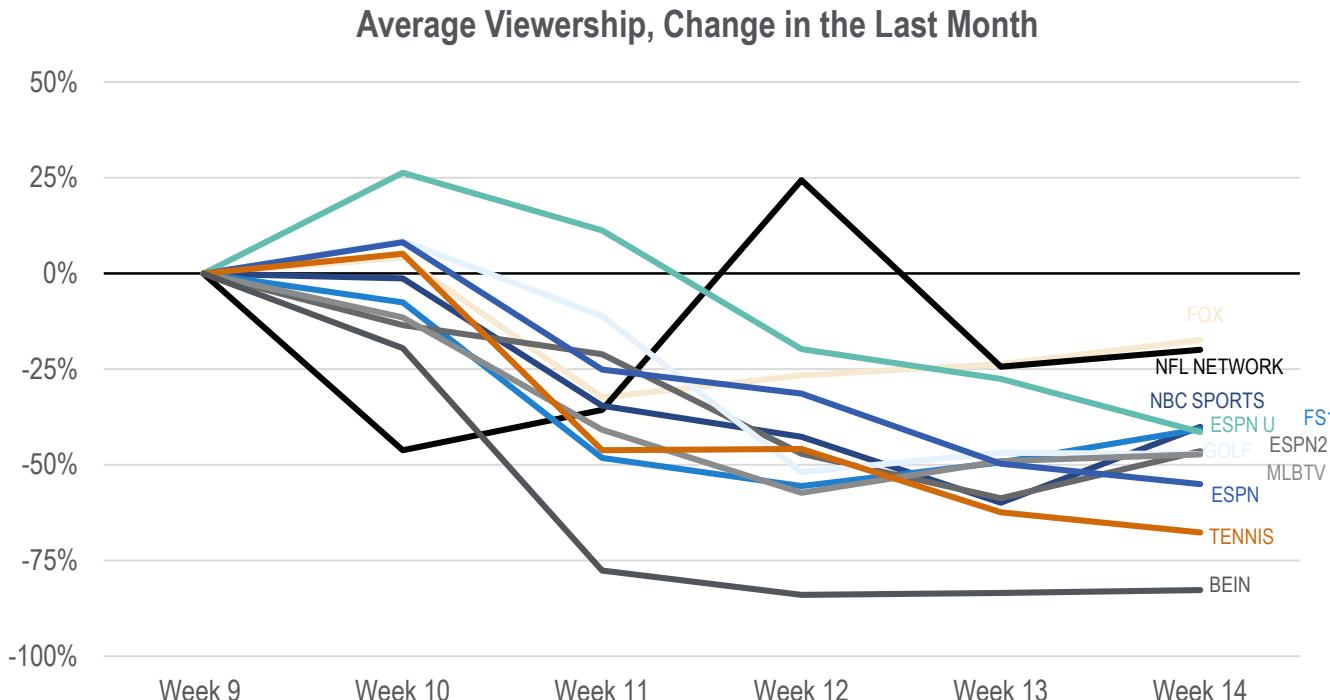
Channel	Average Viewership this week (000)
CNN	1,423
FX Movies	105
E!	184
FYI	97
UP	102
NatGeo Wild	197
DIY	146
Hallmark Drama	73
Smithsonian	88
Showtime	53

Source: Nielsen National TV Ratings

# BOTTOM MONTH-OVER-MONTH CHANGE



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



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

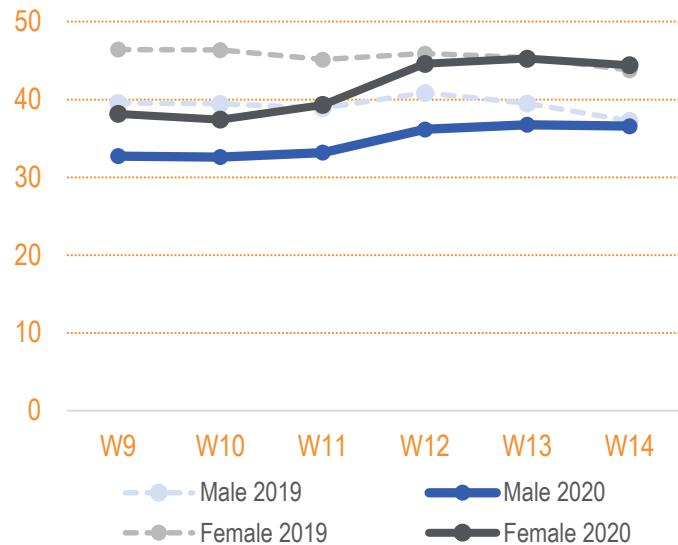
Source: Nielsen National TV Ratings

# DEMO REVIEW: GENDER

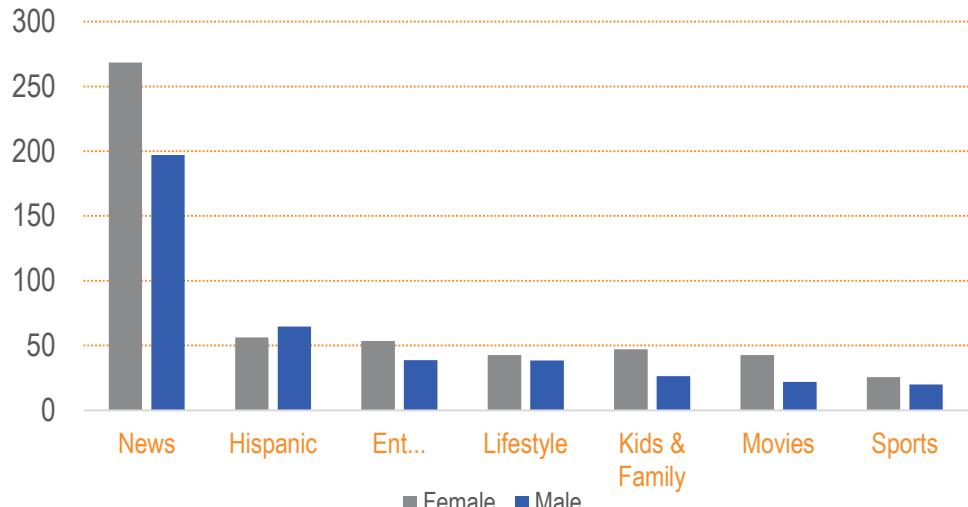


Women have been quicker to adjust and surpass 2020 viewership levels but men are now catching up, matching their 2019 levels this week.

Viewership Trends by Gender



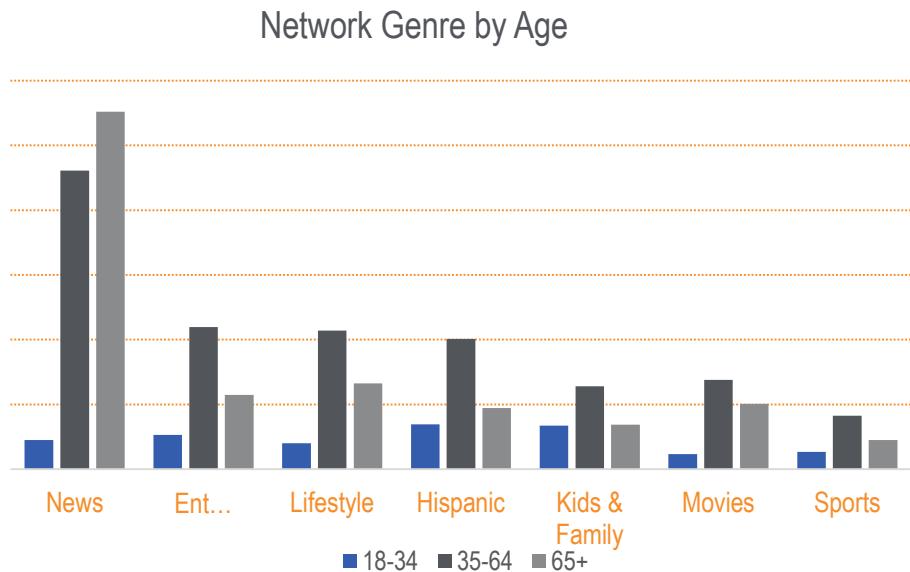
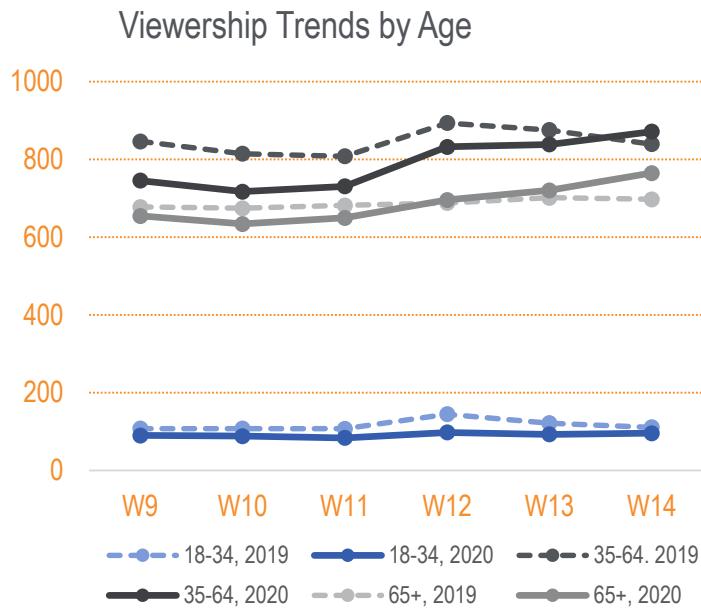
Network Genre by Gender



# DEMO REVIEW: AGE



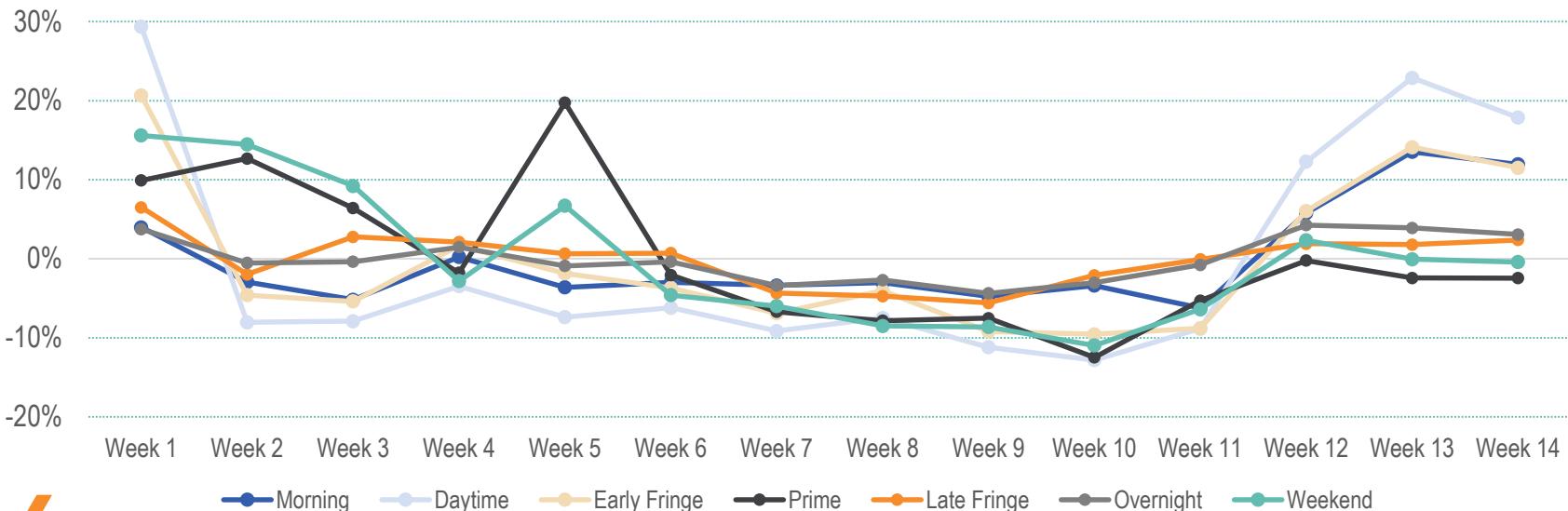
Adults 35-64 have seen the largest changes in viewership as younger and older viewers somewhat maintain their same linear viewings habits.



# 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



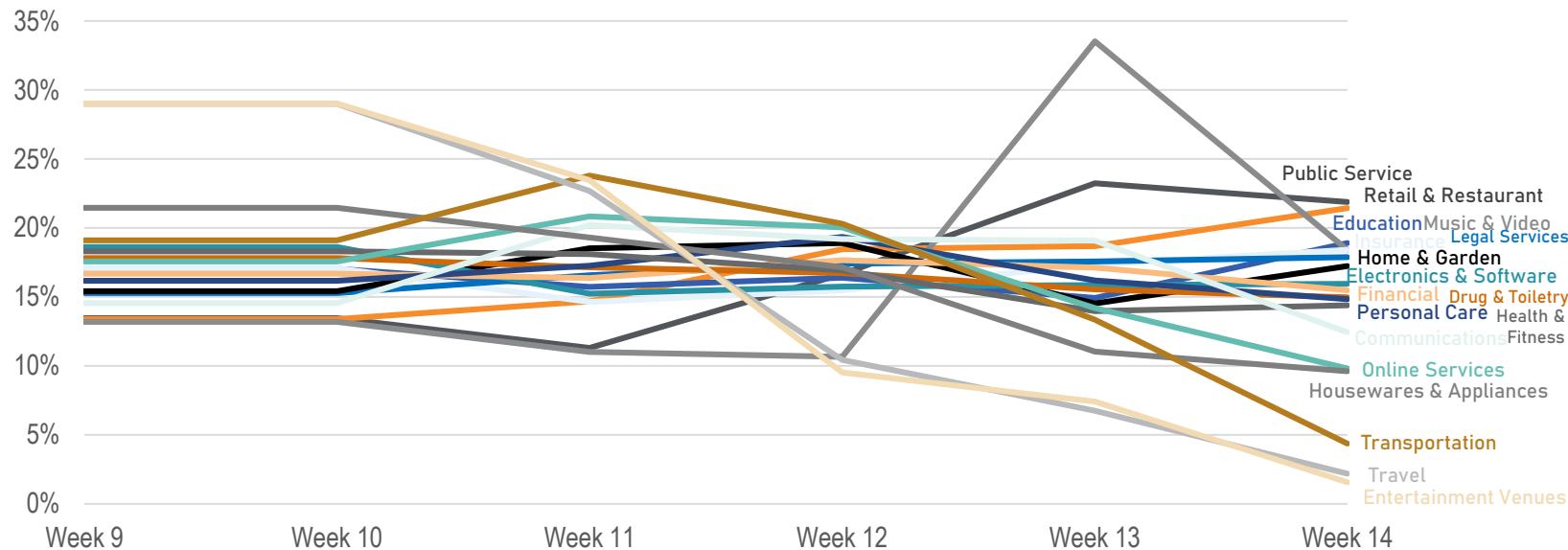


ADVERTISER **TRENDS**

# 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

	# of Airings	% WoW
Total	4183	-13%
Bissell Cordless Max	905	+350%
GraniteStone / GraniteRock	374	+1%
Mighty Sight	367	+62%

## Online Service & Shopping

	# of Airings	% WoW
Total	7310	-31%
Experian Boost	1697	-34%
Touch Of Modern	1012	0%
thredUP	904	N/A

## Communications

	# of Airings	% WoW
Total	7148	-35%
GoDaddy	2113	-21%
Dish Network	919	+2%
AT&T TV	631	-28%

## Music & Video

	# of Airings	% WoW
Total	1131	-45%
Amazon Music	685	-60%
Trolls World Tour	322	N/A
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%