



TV VIEWERSHIP REVIEW:

MEDIA WEEK 19:
MAY 11TH – MAY 17TH



May 21, 2020



TV VIEWERSHIP DEEP DIVE

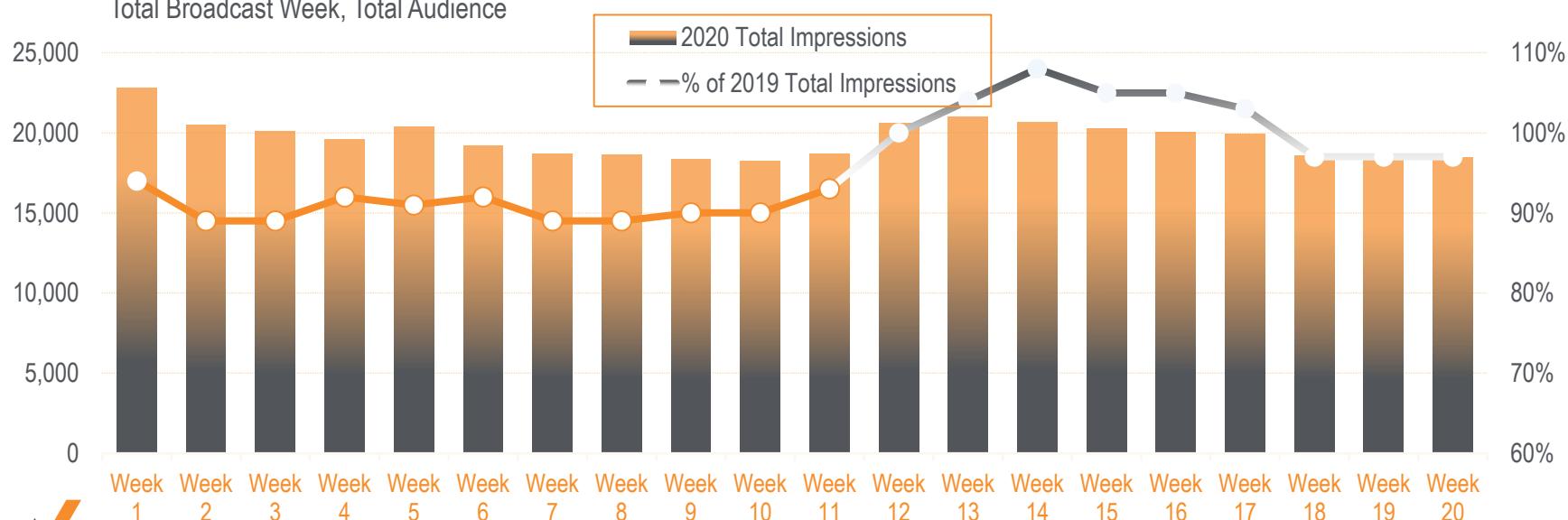


WEEKLY VIEWERSHIP TRENDS

Viewership over the last three weeks has been very consistent even as some states have started to slowly reopen.

Estimated Total Weekly Impressions (in millions)

Total Broadcast Week, Total Audience

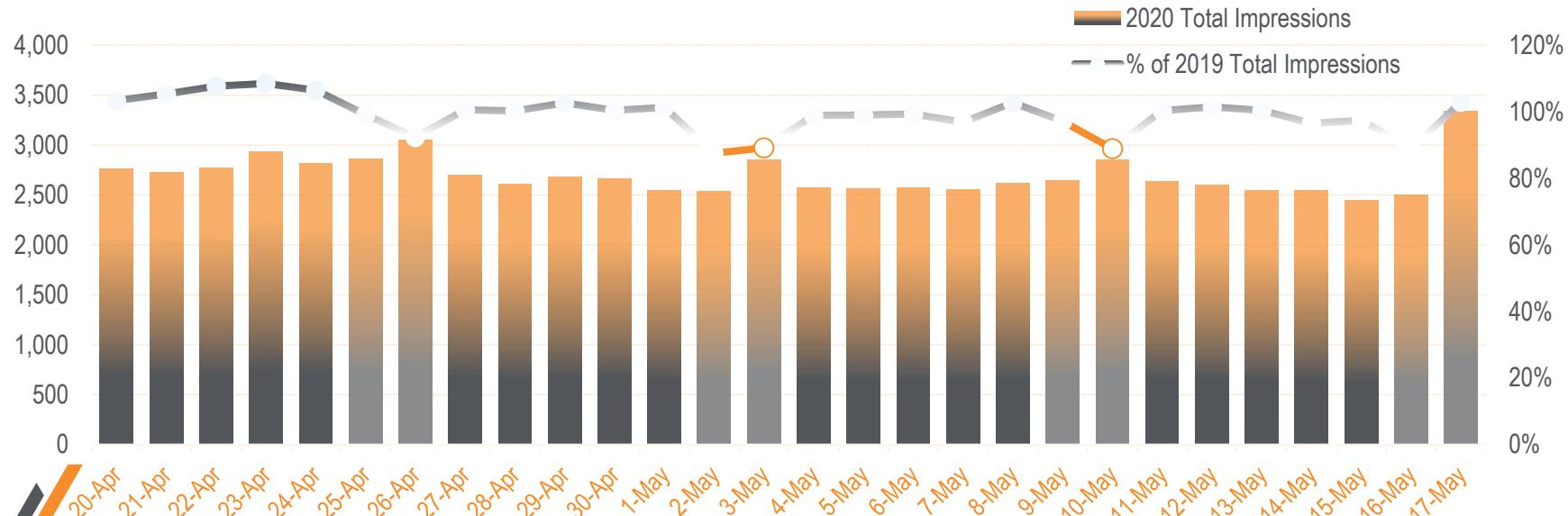


DAILY VIEWERSHIP TRENDS

Viewership, though pretty stable in Week 20, did trend downward across the weekdays, dropping most significantly on Friday. It's likely we will see this trend continue in week 21.

Estimated Total Daily Impressions (in millions)

Total Day, Total Audience



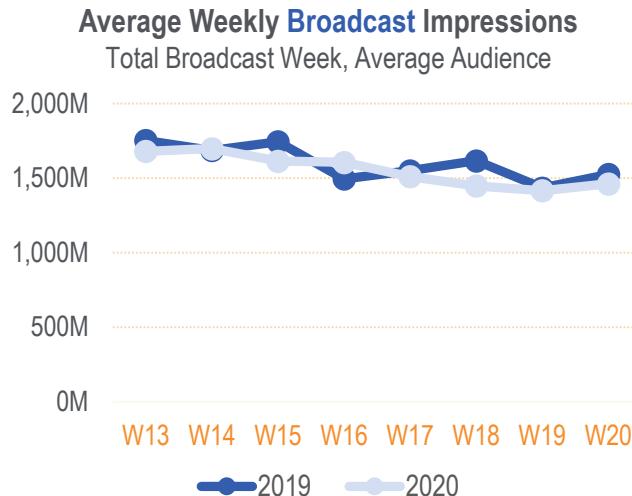
Source: Nielsen National TV Ratings

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NETWORK GENRE PERFORMANCE

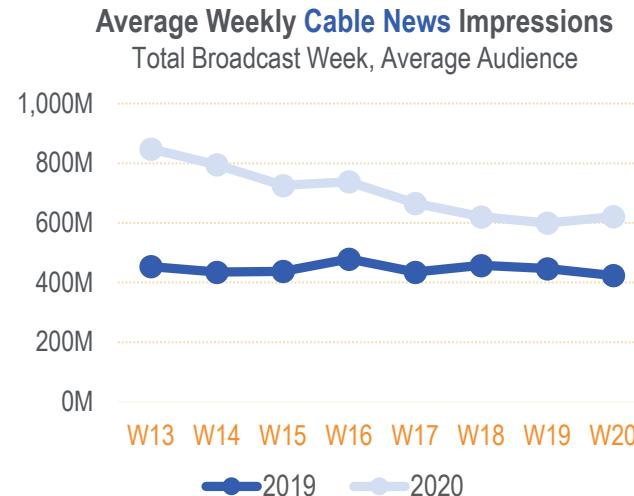


Broadcast and Cable News remained stable through week 20, with Cable news seeing slight week-over-week gains.



Broadcast Networks

ABC, CBS, FOX, NBC



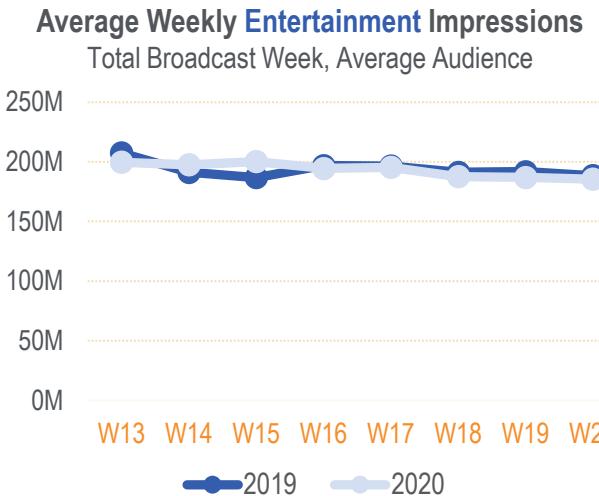
News Networks

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

NETWORK GENRE PERFORMANCE

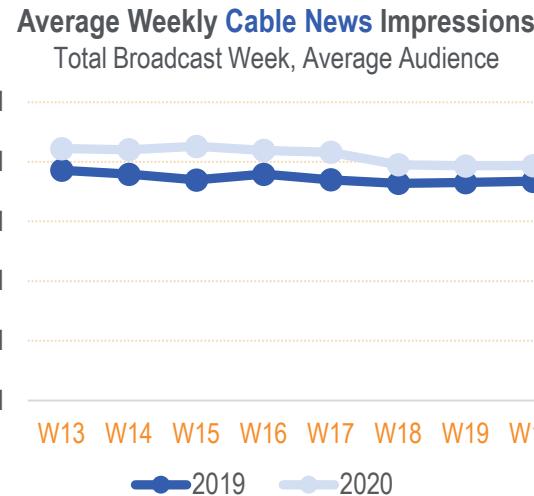


Again, viewership remained consistent, with Lifestyle networks maintaining a year-over-year lead.



Entertainment Networks

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



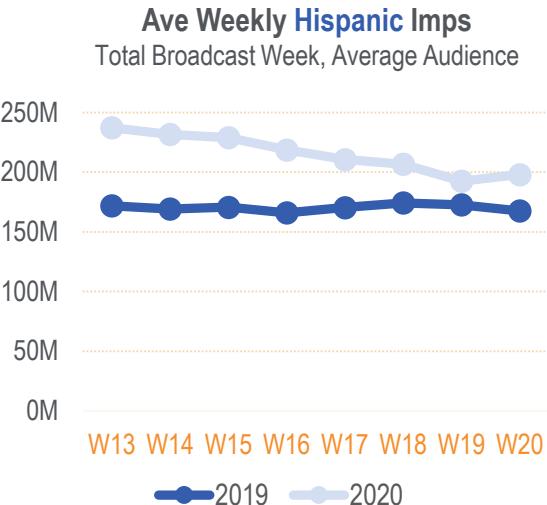
Lifestyle Networks

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

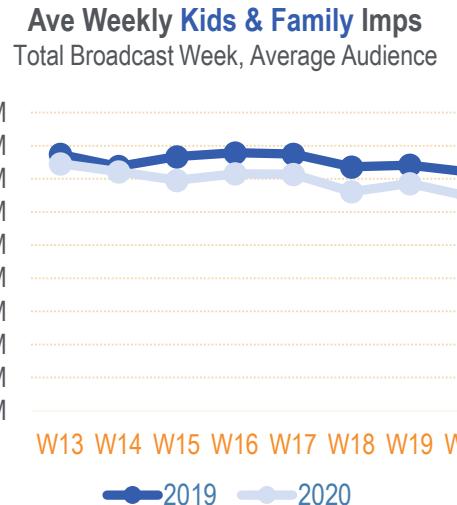
NETWORK GENRE PERFORMANCE



Kids & Family networks saw a loss in viewership during Week 20, as weather permits kids to spend more time outside and streaming services like Disney+ cement their place in families media diets.



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

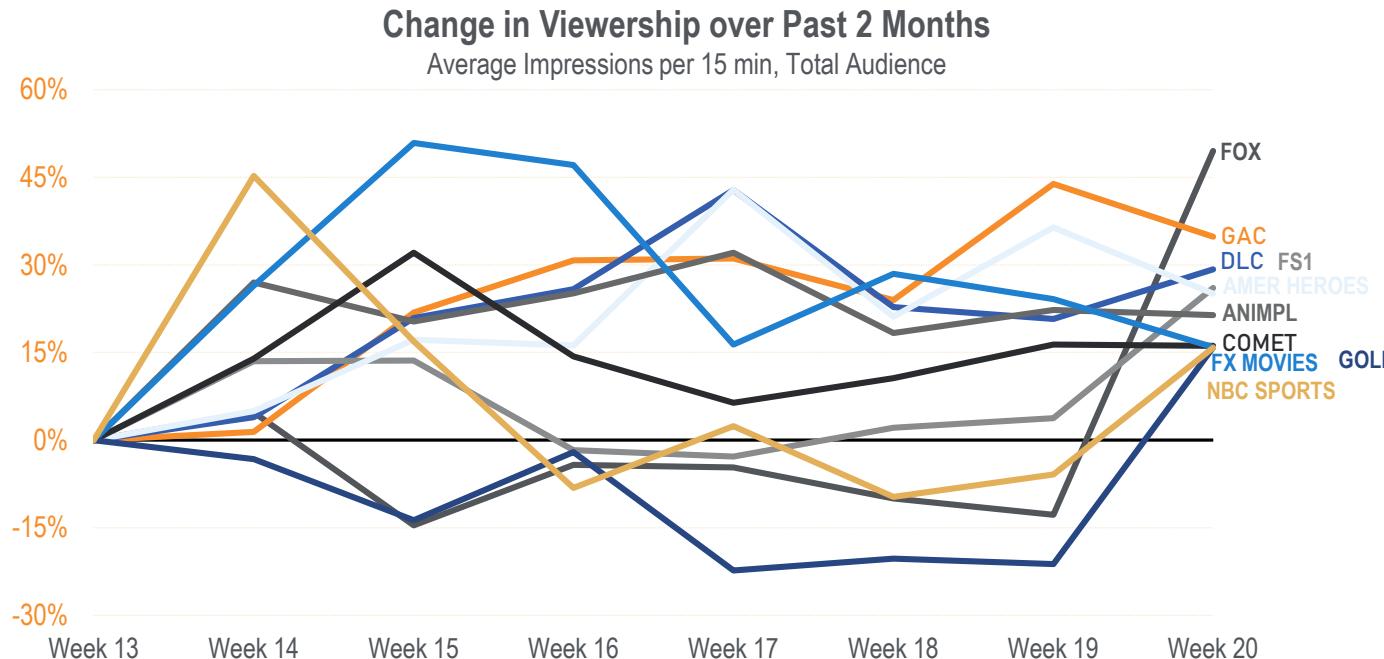


Sports Networks
BEIN; BEIN HISP; ESPN; ESPN DEP; ESPN2; FOX
SPORTS 1; FOX SPORTS 2; GOLF; MLBTV; NBATV;
NBC SPORTS; NFL NETWORK; TENNIS

CHANNELS WITH THE MOST INCREASED VIEWERSHIP



Week 20 channel viewership was defined by the return of two live sporting events, the PGA Tour and NASCAR. NBC Sports and The Golf Channel covered the PGA Tour and FOX and FOX sports covered the NASCAR Cup Series.



Channel	Average W19 Viewership (000)
FOX	339.94
Great American Country	72.34
Discovery Life Channel	41.37
Fox Sports 1	76.69
American Heroes	85.86
Animal Planet	208.1
Comet	60.49
FX Movies	94.63
Golf	47.37
NBC Sports	48.13

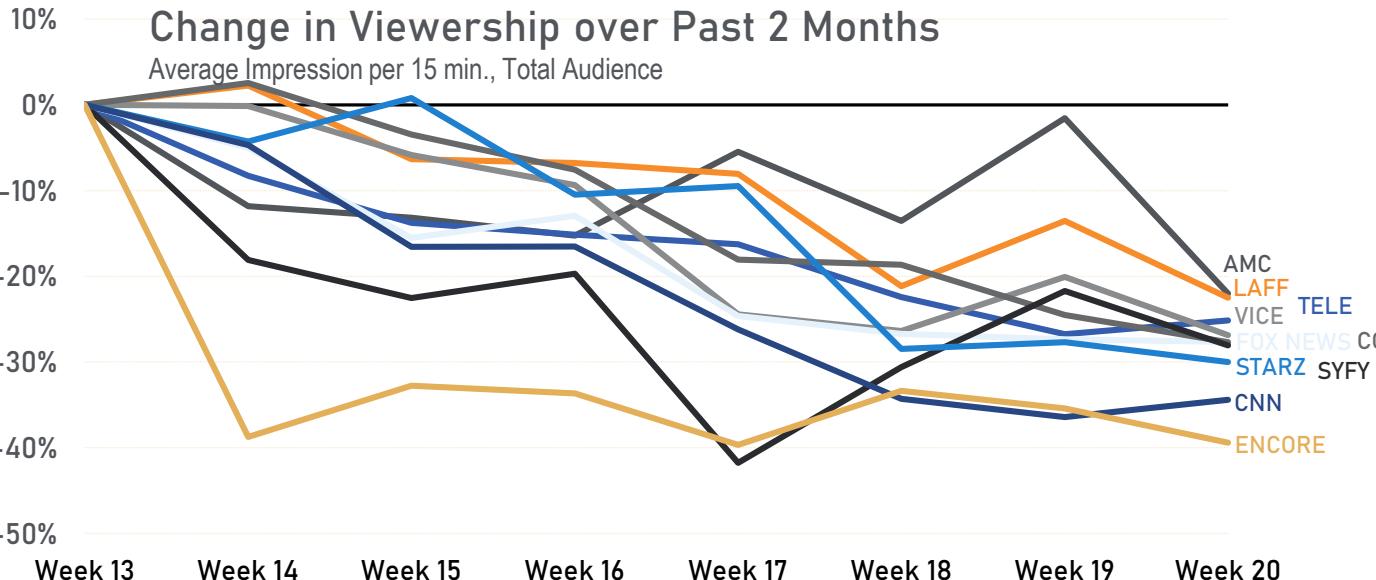
Source: Nielsen National TV Ratings

CHANNELS WITH THE MOST DECREASED VIEWERSHIP



Cable News networks Fox News and CNN recovered some viewership in Week 20 but remain far below viewership levels near the start of the crisis.

After a major peak in viewership in Week 13, Encore returned to normal viewership levels over the last two months.



Channel*	Average W20 Viewership (000)
AMC	220.52
LAFF	118.82
Tele	453.56
Vice	32.28
FOX News	1,655.58
Comedy Central	181.3
Syfy	200.84
Starz	32.38
CNN	965.11
Encore	36.42

*Some Small Channels have been removed

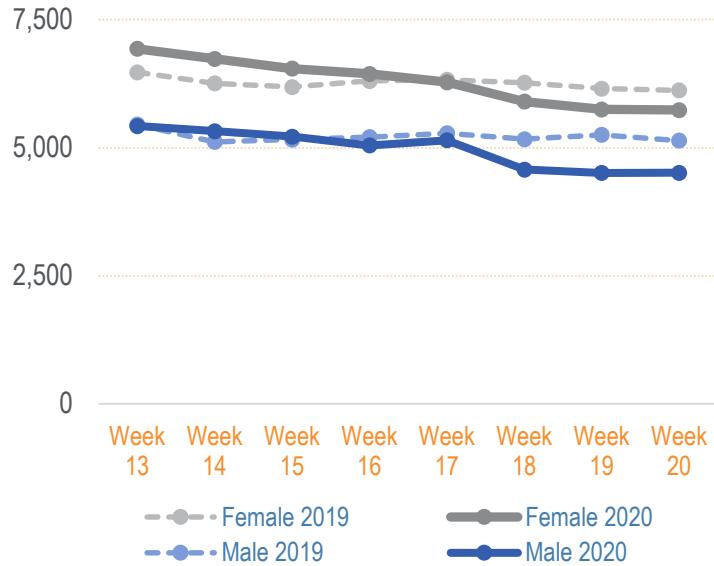
DEMO REVIEW: GENDER (AGE 25-54)



Total viewership among 25-54 year-old was consistent last week. The return of Golf and NASCAR seem to have affected viewership more than female, though both remain low.

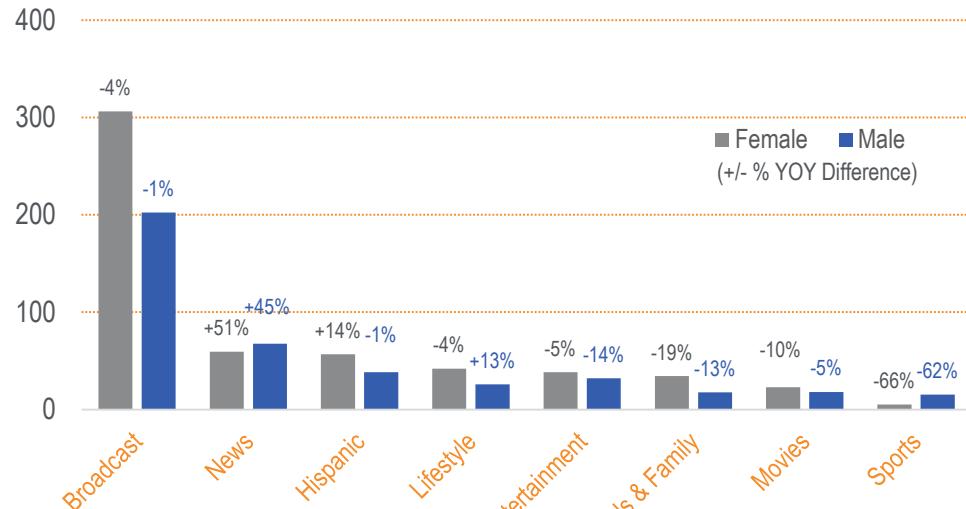
Estimated Total Weekly Impressions

Total Broadcast Week, Total Audience Age 25-54



Average Weekly Genre Impressions

Total Broadcast Week, Total Audience Age 25-54



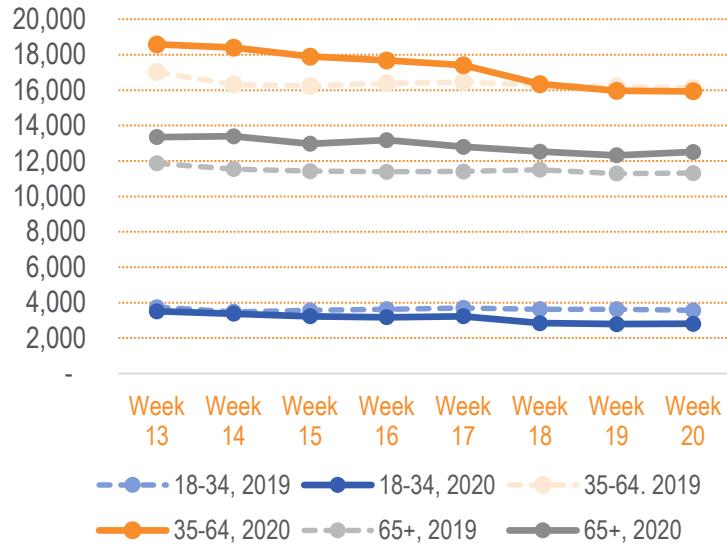
DEMO REVIEW: AGE



The overall drop in viewership that happened in Week 18 then plateaued seems to have primarily come from the 35-66 year-old group, with a smaller but similar pattern present among 18-34 year-olds. Those 65+ continue to have increased year-over-year viewership.

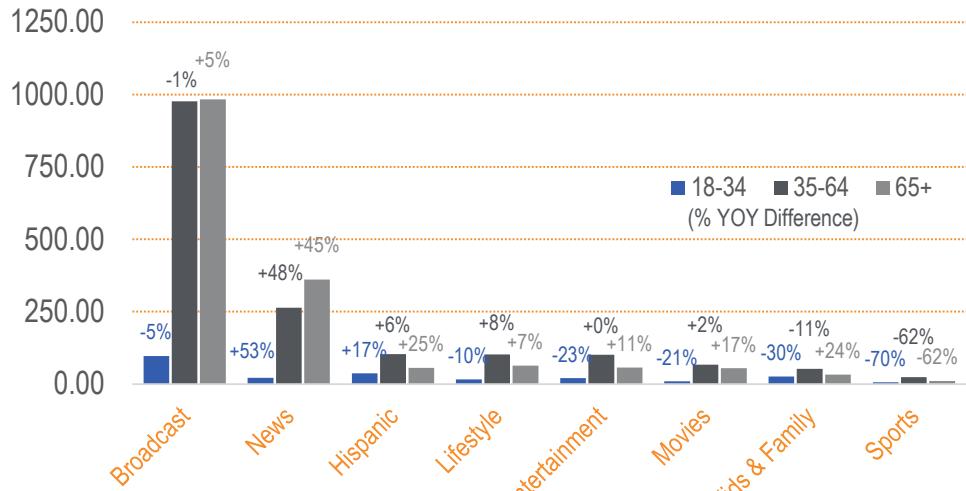
Estimated Total Weekly Impressions

Total Broadcast Week, Total Audience



Average Weekly Genre Impressions

Total Broadcast Week, Total Audience

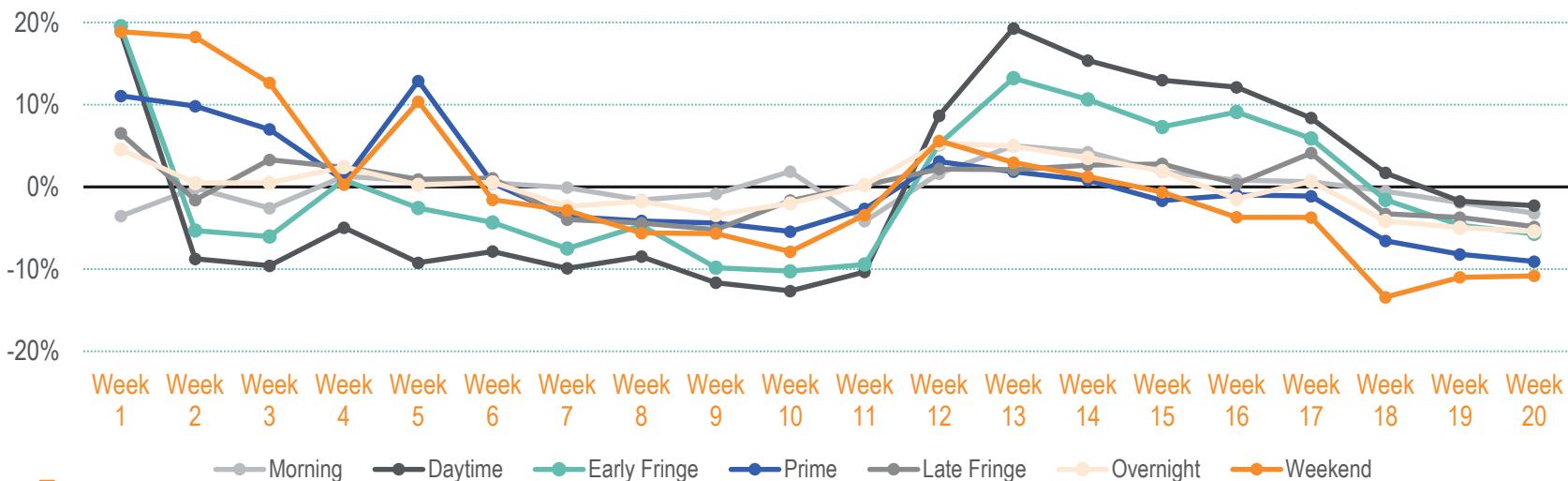


DAYPART TRENDS

After a larger drop in Weekend viewership during Week 18, Weekend viewership has stabilized, though remains furtherst below its 2020 average.

% Difference from 2020 Daypart Average

Total Broadcast Week, Average Audience



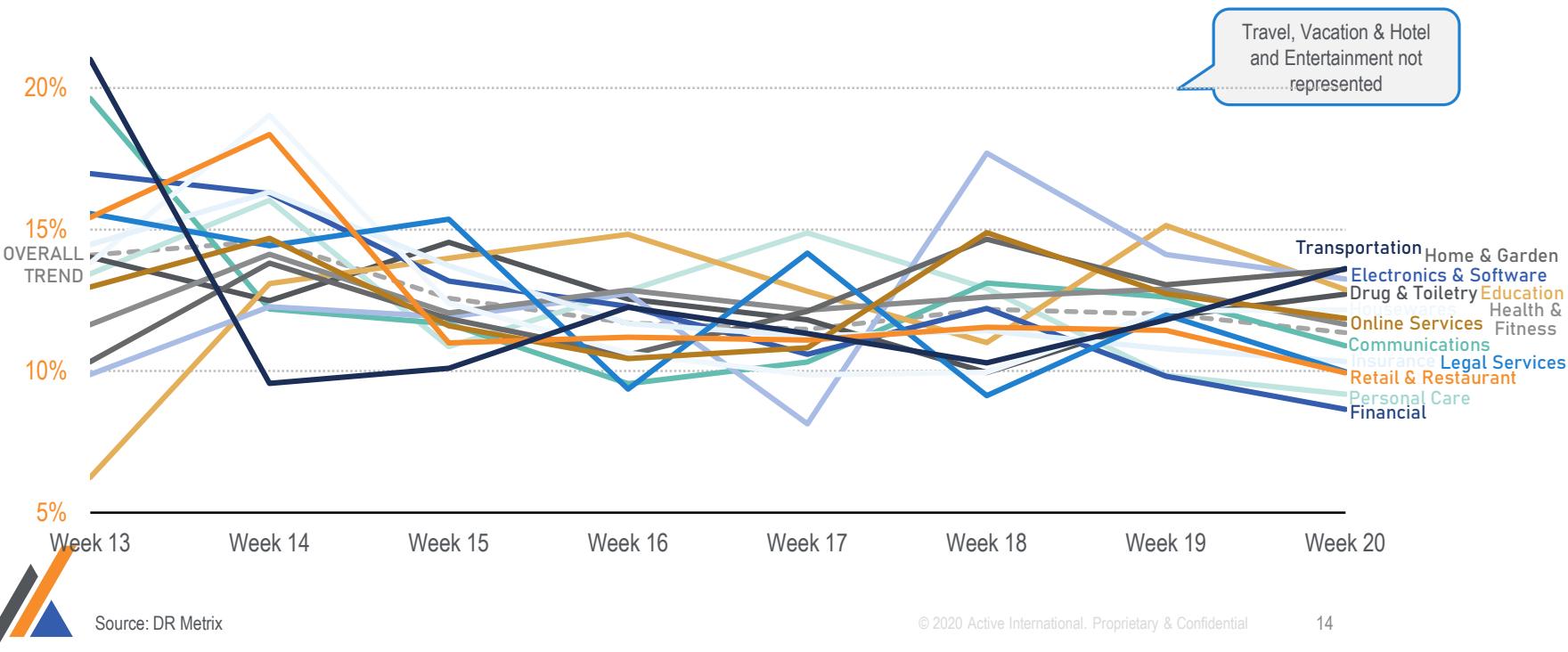


DR ADVERTISER **TRENDS**

ADVERTISER CATERGORIES' RESPONSES

Over the last two months, overall Direct Response spending has steadily decreased as brands balance the decrease cost of TV inventory and the retraction in advertising spending.

Distribution of Spending over the Last 8 Weeks, by Category



TOP ADVERTISERS CATEGORIES WITH **WOW INCREASE**



Transportation spending increases seemed to come primarily from car repair & accessories advertisers. Timeshare company, Club Wyndham's entrance onto TV made a big splash in the significantly diminished Travel category, as most brands continue to hold back on advertising.

Transportation (Sales & Repair)			Travel, Vacation & Hotel			Drugs & Toiletry		
	Spend (000)	%WoW		Spend (000)	%WoW		Spend (000)	%WoW
Total	\$8,032	+15%	Total:	\$389	+12%	Total:	\$79,432	+7%
Carvana.com	\$2,272	-5%	Sandals	\$213	+10%	Dupixent	\$6,819	+88%
DriveTime	\$822	-0%	Beaches	\$75	-17%	Humira	\$6,724	+20%
Weather Tech	\$636	+9%	Club Wyndham	\$42	N/A	Otezla	\$4,019	-6%

TOP ADVERTISERS CATEGORIES MOST STABLE WoW



Ace Hardware doubled spending on their new creative, focused on grilling and the backyard, a focus of the category in general as headed toward summer. Mattress brands also have increased their spending, hoping to still bank on Memorial Day

Home & Garden

	Spend (000)	%WoW
Total:	\$28,403	+4%
Home Depot	\$4,643	+9%
Ace Hardware	\$2,750	+104%
Wayfair.com	\$1,118	-12%

Housewares & Appliances

	Spend (000)	%WoW
Total:	\$7,456	0%
Sleep Number	\$1,316	+46%
Mattress Firm	\$1,001	N/A
My Pillow	\$984	-6%

Public Service

	Spend (000)	%WoW
Total:	\$22,038	-3%
United States Census 2020	\$4,072	+3%
#Alone Together	\$2,814	+55%
ASPCA	\$2,040	-10%

Insurance

	Spend (000)	%WoW
Total:	\$45,523	-4%
Geico	\$9,654	+11%
Progressive	\$8,047	-8%
Liberty Mutual	\$5,729	+7%

TOP ADVERTISERS CATEGORIES WITH SOME WOW DECREASES



Microsoft Teams, and Paycom, both B2B advertisers increased spending this week, hoping to reach business decision-makers as they set up long-term solutions.

Electronics & Software			Beauty, Hygiene & Personal Care			Online Services & Shopping		
	Spend (000)	%WoW		Spend (000)	%WoW		Spend (000)	%WoW
Total:	\$13,204	-6%	Total	\$28,223	-1%	Total	\$28,223	-1%
Microsoft Teams	\$5,584	+30%	Domino's	\$3,589	-28%	Domino's	\$3,589	-28%
Portal from facebook	\$1,013	-76%	Macy's	\$3,171	+137%	Macy's	\$3,171	+137%
paycom	\$932	+80%	Little Caesars Pizza	\$2,994	-8%	Little Caesars Pizza	\$2,994	-8%

TOP ADVERTISERS CATEGORIES WITH WOW DECREASES



Pizza is dominating Retail & Restaurant advertising with Pizza Hut spending 4th most in category. Sirius XM has more than doubled their spending in the last week, hoping to convert consumers who may be returning to their regular commute.

Health & Fitness

	Spend (000)	%WoW
Total:	\$26,668	-10%
Noom	\$2,009	+6%
Nutrisystem	\$1,489	-25%
Weight Watchers	\$1,289	+62%

Financial

	Spend (000)	%WoW
Total:	\$13,888	-12%
Rocket Mortgage	\$1,790	+25%
Experian Boost	\$1,462	-9%
Discover It	\$1,074	+5%

Retail, Restaurant & Food Venues

	Spend (000)	%WoW
Total:	\$24,505	-13%
Domino's	\$2,898	-19%
Little Caesars Pizza	\$2,451	-18%
Macy's	\$2,191	-31%

Communications

	Spend (000)	%WoW
Total:	\$15,301	-14%
AT&T	\$2,810	-36%
Consumer Cellular	\$1,922	+26%
Sirius XM	\$1,621	+120%

TOP ADVERTISERS CATEGORIES WITH MOST WOW DECREASES



Though top spenders University of Phoenix, SNHU, and WGU have maintained or increase spending in the last week, non-degree granting Education brands Babbel and Masterclass significantly cut spending in Week 20.

Education			Legal Services			Miscellaneous			Entertainment		
	Spend (000)	%WoW		Spend (000)	%WoW		Spend (000)	%WoW		Spend (000)	%WoW
Total:	\$7,583	-15%	Total:	\$2,223	-17%	Total:	\$23,832	-19%	Total:	\$2,385	-22%
University of Phoenix	\$1,244	+9%	Mesothelioma Lawsuit	\$457	-1%	M&M's	\$1,521	+13%	What Are the Odds	\$717	-12%
SNHU	\$1,124	+16%	Los Defensores	\$270	+47%	Corona	\$1,512	-11%	Extra Dedication (iHeart Radio)	\$262	-14%
WGU	\$1,065	-1%	Zantac Lawsuit	\$259	+75%	Brand Power	\$1,495	-5%	NFL Inspire Change	\$220	+8%