

Simulmedia TV Marketplace Update

April 10, 2020

SIMULMEDIA®

Overview For Week Ending April 10, 2020

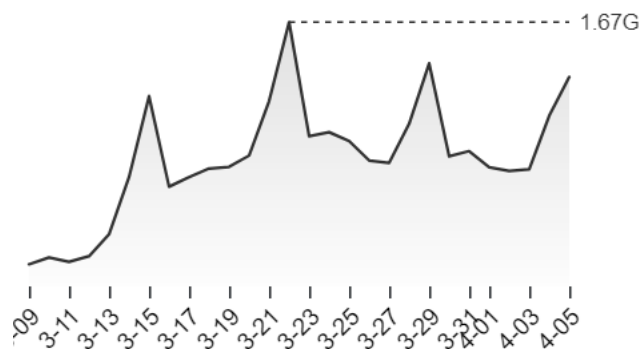
In an effort to keep our clients and partners informed on the latest changes in the marketplace, we explore how TV viewing habits are changing as a result of the coronavirus. We also look ahead and invite you to try beating our patented forecasting capability.

What's In This Update:

- Changes in TV viewing, overall and by genre:
 - Overall
 - By genre
- Where are all the additional impressions going? An increase in fragmentation
- Win a \$100 gift card if you can beat Simulmedia's forecaster

For our interactive dashboards, click [here for our ratings analysis](#) and [here for our analysis on how impressions are impacting program ratings](#) and to get data on every network.

TV Viewing Trends: Stabilizing to a New Norm; 4.4 Billion More Impressions In Market Since Early March



Overall TV Viewing

[All Networks]

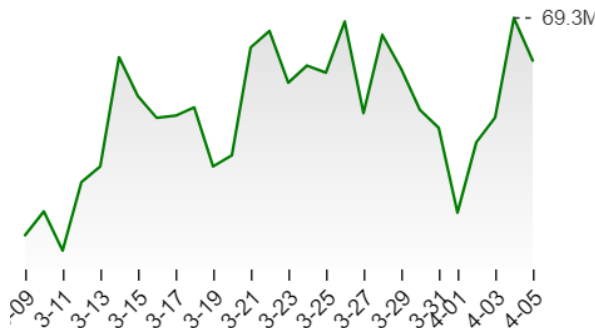
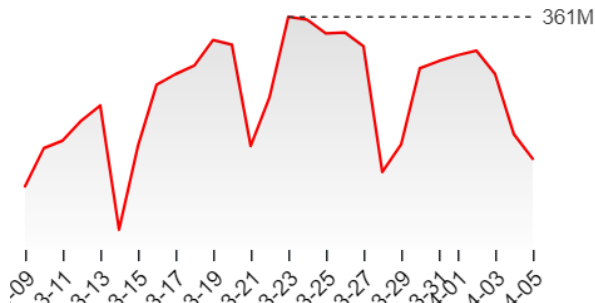
3/16 - 3/22	+12.6%	+1.13B impressions
3/23 - 3/29	+1.1%	+114M impressions
3/30 - 4/5	-1.7%	-172M impressions

Though week-over-week impressions have declined by 172 million, that's still up by over 1 billion, compared to early March.

As a result, overall TV impressions have increased by 4.4 billion in that time period.

News And Kids -4.1%, -5.5% WoW

Though viewing in these categories has decreased WoW, it's still up significantly relative to early March.



News Networks

[CNBC, CNN, Fox News, Fox Business, MSNBC, ...]

3/16 - 3/22	+19.4%	+362M impressions
3/23 - 3/29	+2.7%	+60.3M impressions
3/30 - 4/5	-4.1%	-94.8M impressions

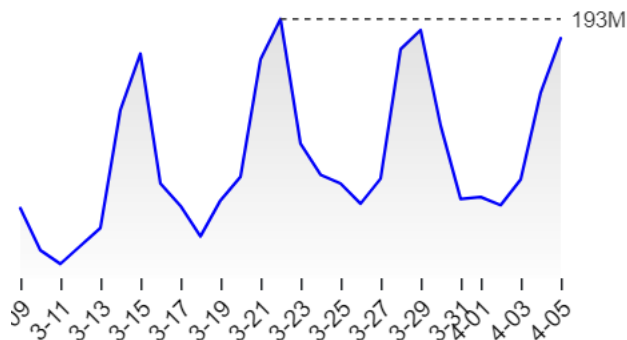
Kids Networks

[Cartoon, Boomerang, Discov Fam, Disney, Nickelodeon, ...]

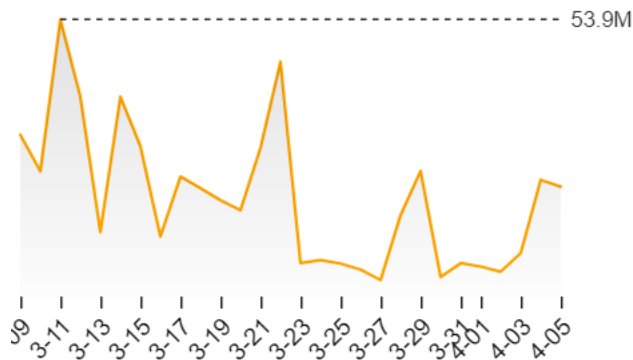
3/16 - 3/22	+8.7%	+35.1M impressions
3/23 - 3/29	+4.9%	+21.6M impressions
3/30 - 4/5	-5.5%	-25.2M impressions

Entertainment -2.9%, Sports +1.1% WoW

Though viewing in these categories has decreased WoW, it's still up significantly relative to early March.



Sports: has viewing stabilized in a cancelled and postponed climate?



Entertainment Networks

[Comedy, USA, Hallmark, History, Travel, Discovery, MTV, ...]

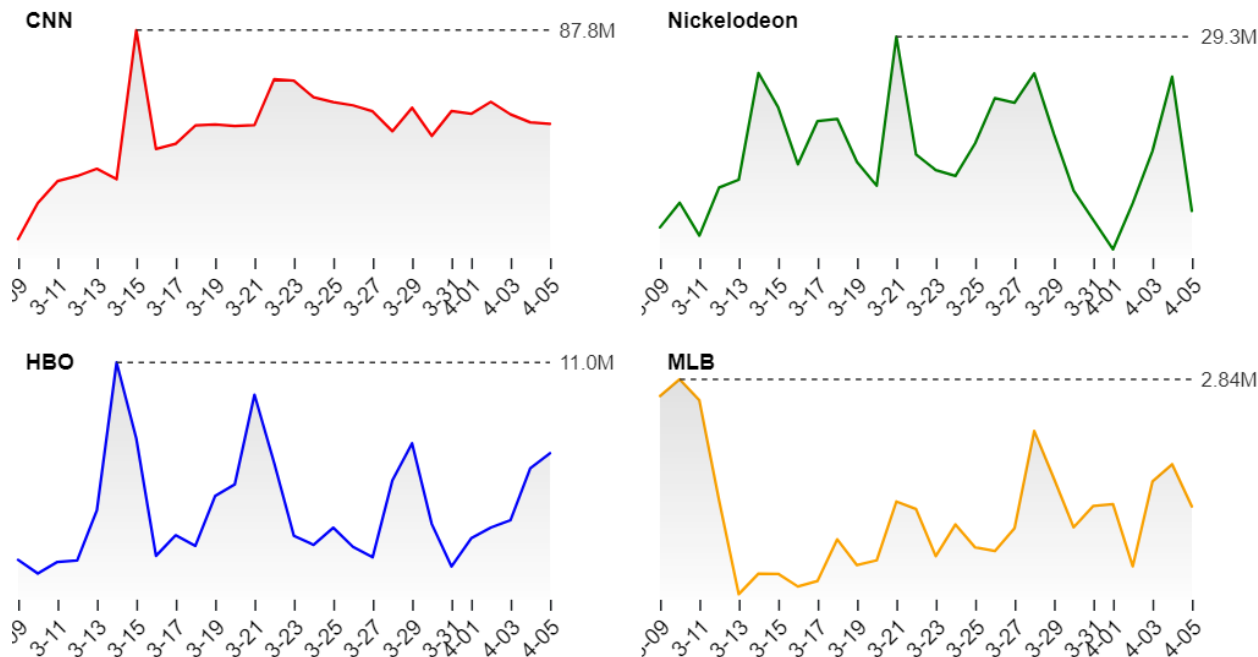
3/16 - 3/22	+12.8%	+110M impressions
3/23 - 3/29	+4.8%	+46.7M impressions
3/30 - 4/5	-2.9%	-29.1M impressions

Sports Networks

[BeIN, ESPN, Fox Soccer, Golf, MLB, NBA, NFL, Tennis, ...]

3/16 - 3/22	-10.9%	-32.7M impressions
3/23 - 3/29	-18.8%	-50.5M impressions
3/30 - 4/5	+1.1%	+2.4M impressions

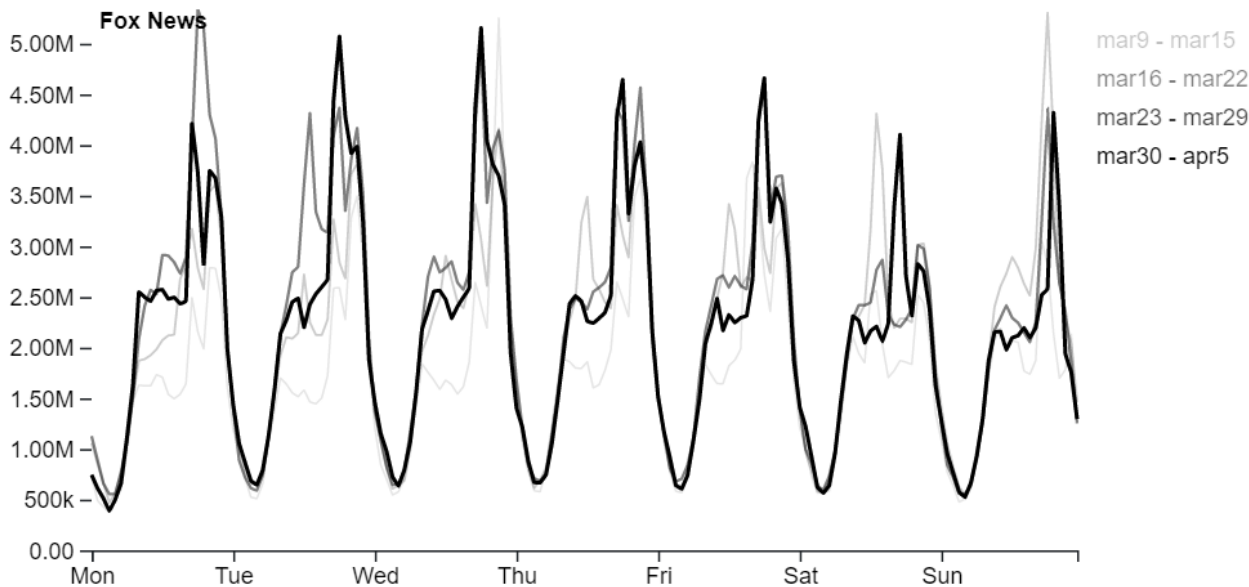
Example Networks Illustrate Changing Viewership



For a full network list, as your account team or check our page on Observable [here](#).

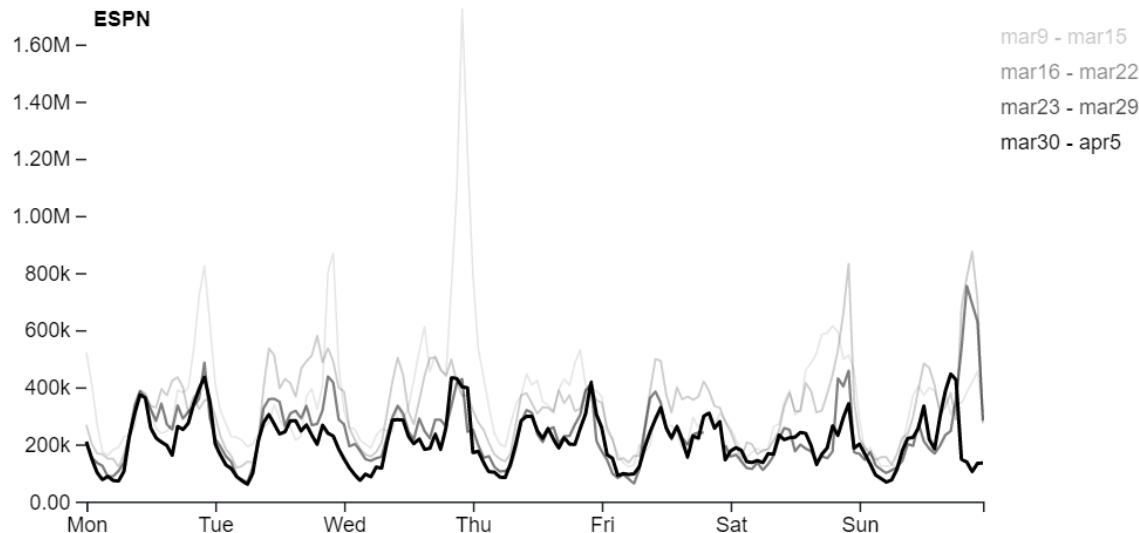
Diving Deeper: WoW Changes Show Profound Shifts

The next two charts show impressions at the hour level, for four weeks, one week at the time. The darker and stronger the line, the more recent the week. It's evident how a network like Fox News has experienced significant overall increases every hour of the day.



Deeper Dive: ESPN Reaching A New Norm (Hopefully Temporary)

On the other end of the spectrum, ESPN has seen a dramatic drop in hourly viewing over the last several weeks, but perhaps sports viewing has stabilized. For advertisers who target sports fans, Simulmedia can find these lost viewers on the other channels they watch and reach them (more in slide 11).



For more charts like this covering other networks, review [our page on Observable](#).

Where Are The Additional Impressions Going?

The percentage of programs that achieve a Nielsen rating of 0.5 almost tripled in March.

A 0.5 rating may not sound like much, but the vast majority of programs on linear TV get that rating or less.

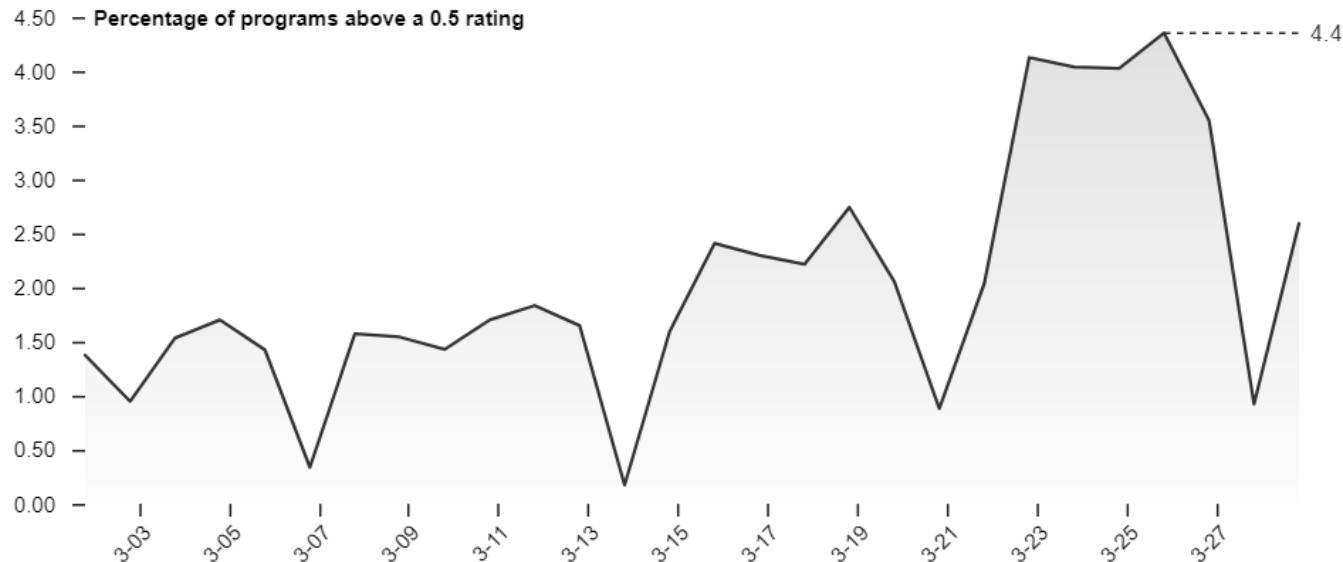
The combination of big tentpole events (mainly sports) cancellations plus the increase of people watch TV have resulted in more people watching more of a wider variety of programs. In two words: **increased fragmentation**.

Click [here to play with our interactive program ratings dashboard](#). This includes a heat map that shows A18-49 ratings for any network, daypart, and date.

Fragmentation Requires A Change In Media Planning

In general, advertisers must **buy more programs and more networks** in order to maximize reach of their audience.

This work is complex and is best mitigated by software.



The percentage of programs getting a 0.5 rating or higher nearly tripled in March.

Which Audience Are You Trying To Reach?

We've run this analysis based on an A18-49 audience, but we can repeat the exercise with any audience, including those based on first-party data, mobile app users, website visitors, and more.

To get an analysis of your audience, simply contact your account team or marketing@simulmedia.com.

Win a \$100 gift card and support local restaurants

Simulmedia is forecasting that these programs will attract the most viewers on Tuesday, April 14, 2020.

Think you know better? Simply tell us how many total cumulative viewers you think next Tuesday's top 10 shows will get. Simulmedia will give whomever is closest to the actual, total viewers a \$100 gift card that can be used to order food from a local restaurant.

Forecasted TOP 10 programs for 4/14/2020						
#	program	episode	network	start time	end time	viewers
1	NCIS	The Arizona	CBS	20:00	21:00	8,006,605
2	ABC World News Tonight With David Muir		ABC	18:30	19:00	7,459,378
3	NBC Nightly News With Lester Holt		NBC	18:30	19:00	7,415,031
4	FBI: Most Wanted	Ironbound	CBS	21:00	22:00	5,800,942
5	CBS Evening News With Norah O'Donnell		CBS	18:30	19:00	5,609,450
6	FBI: Most Wanted	Ride or Die	CBS	22:00	23:00	5,053,824
7	The Price Is Right		CBS	11:00	12:00	4,718,838
8	Ellen's Game of Games	Life in the Blast Lane	NBC	20:00	21:00	4,606,748
9	Hannity		FOXNEWS	21:00	22:00	4,460,116
10	New Amsterdam	Matter of Seconds	NBC	21:00	22:10	4,233,156

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