



2020

#AloneTogether

Culture in the Time of COVID-19

About VAB

VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.

Simplify

We save you time by bringing you the latest data & actionable takeaways you can use to inform your marketing plans.

Discover

We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

Transform

We help you build your brand by focusing on core marketing principles that will help drive tangible business outcomes.

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A Deeper Look At The Video and Ad-Supported TV Conversations

What You'll Learn...

- ▶ How **video programming and content** has clearly become our **primary 'conversation fuel'** during this time of physical and emotion isolation
- ▶ How **real-time social platforms** like Twitter **act as a mirror reflecting** what **our society** is most passionate about, motivated by, and attentive to during this unprecedented time of uncertainty
- ▶ By understanding what content is trending and what inspires conversation, **how marketers can build connections** to committed, engaged and attentive viewers

TV has become the **centerpiece of the household**, with 8 out of 10 people saying they couldn't imagine not having a **television** during the pandemic

% of respondents who agree with the statement

P18+



83%

“I couldn't imagine not having a television set right now”



70%

“I binge watch more TV shows or movies”



67%

“TV has become the central focus of our home”

Source: VAB's '[As Time Goes By: How Media Consumption Is Helping America Cope](#)'. VAB / Lucid 'Media Usage In The Time of COVID-19 Survey,' April 2020. Survey base: P18+ & household subscribes to cable, telco, internet TV or satellite TV (n=1,004). Q7: Thinking of your behavior since the start of COVID-19, please indicate below how much you agree or disagree with the following statements & Q9: Thinking of your behavior during the COVID-19 Pandemic, please indicate below how much you agree or disagree with the following statements

Since the start of COVID-19, **live TV** and **social media** are experiencing the **biggest increase** in consumption

► Overall, **84%** of respondents say they have more time to watch/listen/read media since the COVID-19 outbreak

% of respondents who increased usage by platform since COVID-19 outbreak

P18+

57%

Live TV



55%

Social Media



54%

SVOD Service



37%

Video Games



35%

Streaming Music



31%

AVOD Service



23%

Podcasts



Source: VAB's '[As Time Goes By: How Media Consumption Is Helping America Cope](#)'. VAB / Lucid 'Media Usage In The Time of COVID-19 Survey,' April 2020. Survey base: P18+ & household subscribes to cable, telco, internet TV or satellite TV (n=1,004). Q2: When thinking about how you've spent your time during the COVID-19 Pandemic, have you increased, decreased or spent the same amount of time with the following media? & Q9: Thinking of your behavior during the COVID-19 Pandemic, please indicate below how much you agree or disagree with the following statements. SVOD: Subscription Video On Demand (e.g. Netflix, Amazon Prime Video), AVOD: Ad-Supported Video On Demand (e.g. Tubi, Roku).

During the COVID-19 lockdown, many popular series and program 'specials' across TV and streaming services have achieved **record ratings and viewership**

Forbes

Michael Jordan Documentary 'The Last Dance' Is The Most-Viewed ESPN Documentary Ever

TV Insider

Sunday TV Ratings: Strong Showing for 'ACM Presents: Our Country' Special on CBS

DEADLINE

'90-Day Fiancé: Before the 90 Days' Surges In Live+3 To Franchise Demo Highs

Sports Illustrated

NFL Draft Shatters TV Ratings Record With 15.6 Million Viewers on First Night

VARIETY

TV Ratings: 'Disney Family Singalong' Draws Massive Audience

DEADLINE

'Killing Eve' Season 3 Premiere Draws 1.1 Million Total Viewers Across BBC America & AMC

PI

Monday Final Ratings: 'Manifest' Season Finale on NBC Draws Most-Watched Telecast Since Season Premiere

Forbes

3.8 Million Viewers Watch Trump 'Virtual Town Hall'

CNN

'Together At Home' TV concert special viewed by more than 20 million people, ratings say

DEADLINE

'Empire' Ends Run On High, CBS' Prince Tribute Goes Crazy To Top Tuesday Ratings

DEADLINE

'The Clark Sisters: First Ladies Of Gospel' Biopic Marks Highest-Rated Lifetime Movie In Four Years

DEADLINE

'iHeart Living Room Concert' And 'American Idol' Top Sunday Ratings

appleinsider

Disney+ gained 16.5M subscribers in just 10 days thanks to coronavirus

VARIETY

TV Ratings: 'This Is Us' Finale Matches Season High 7.9 Million Viewers

VARIETY

'Dark Side of the Ring' Season 2 Premiere Sets Vice Ratings Record

DEADLINE

VH1 Scores Highest-Rated Friday Night In Over 10 Years With 'RuPaul's Drag Race' And 'Secret Celebrity Drag Race'

NBC Sports

2020 WNBA Draft posts 123% increase in viewers from prior year

yahoo! sports

NFL draft smashes television ratings records on the second day, too

VARIETY

TV Ratings: 'Grey's Anatomy' Finale Scores 1-Year Audience High

WRESTLING

WrestleMania 30 Special Draws ESPN's Highest Rating Of The Entire Weekend

W

WrestleMania 36 shatters more records

VARIETY

TV Ratings: 'The Good Doctor' Snags Season High 6.8 Million Viewers

HOLLYWOOD.COM

Tom Holland's Onward is a Disney+ hit with lockdown viewers

PI

Sunday Final Ratings: 'Homeland' on Showtime Hits Season-Highs in Total Viewers and Demos with Series Finale

TV Insider

'Schitt's Creek' Goes Out With a Bang, Finale Pulls in Highest Ratings for Series

ESSENCE

#HOMEcoming: Beyoncé-Approved 'Homecoming' Watch Party Goes Viral

Video at the Center of Culture During COVID-19





Quantifying Culture in the Time of COVID-19

With outside physical interactions limited, social media became the bellwether for understanding culture during the lockdown, particularly **Twitter** which is a platform for ‘real time’ social engagement built around what people are talking about ‘right now.’

To take the cultural pulse of the country, we analyzed the top 10 trending Twitter topics each night over the first six weeks of country-wide lockdown orders (**March 16th - April 26th**).

Since trending topics are ever-changing, we monitored two “points in time” each night to capture what people are talking about online throughout the evening: **9:30p and 11:00p**.

Trending topics based on video content include two types which have been aggregated within this analysis:

- **Direct:** specific ‘official’ hashtags of entertainment shows, sports content or news programming
- **Related:** topics associated with specific video programming including athletes (ex. football players being selected in the 2020 NFL Draft), show characters, celebrity personalities, and specific video platform-related news references

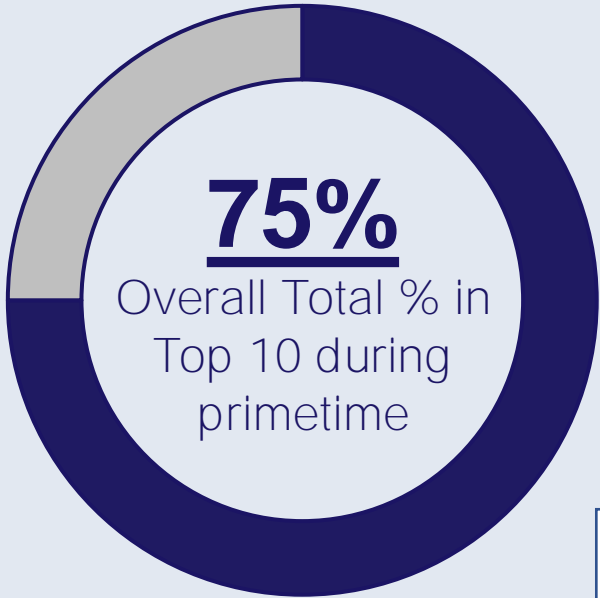
*Geography reflects United States-based Twitter Top 10 Trending data

Note: Twitter skews towards a millennial audience – P18-34 account for 34% of users and 52% of total time spent on the platform (Comscore, MediaMetrix Key Measures multiplatform data, March 2020).



Video content accounted for **three-quarters of the top 10** Twitter trending topics at night during the six-week analysis

% of Video Topics in the Top 10 During Primetime (March 16th – April 26th)



vs. 11% for non-video platform related pandemic topics

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.

In contrast to many of the organic Twitter trending topics about COVID-19, video provides a **fun, lighthearted** and **safe** space for users with comforting content about and around the pandemic

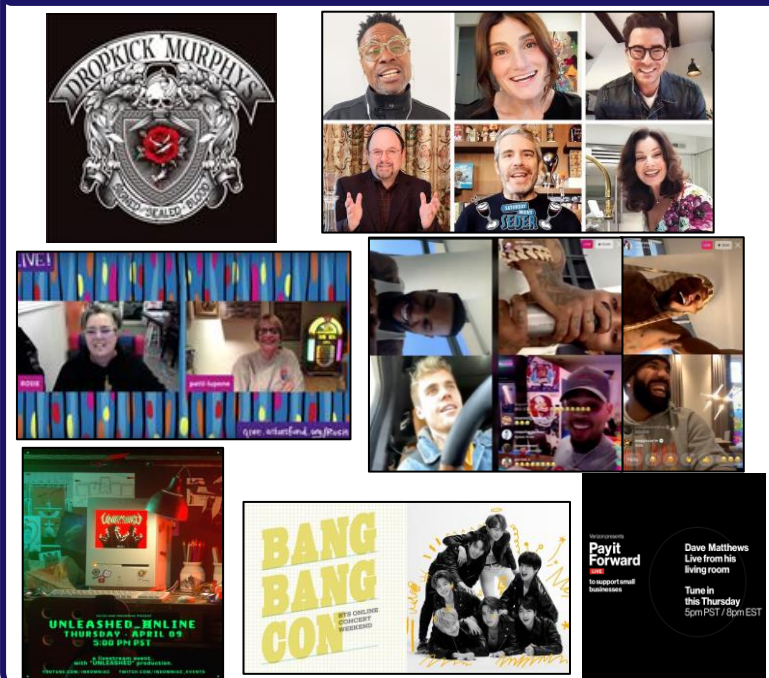
Sampling of Pandemic-Related Topics By Platform

(March 16th – April 26th)

Ad-Supported TV



Other Video Platforms



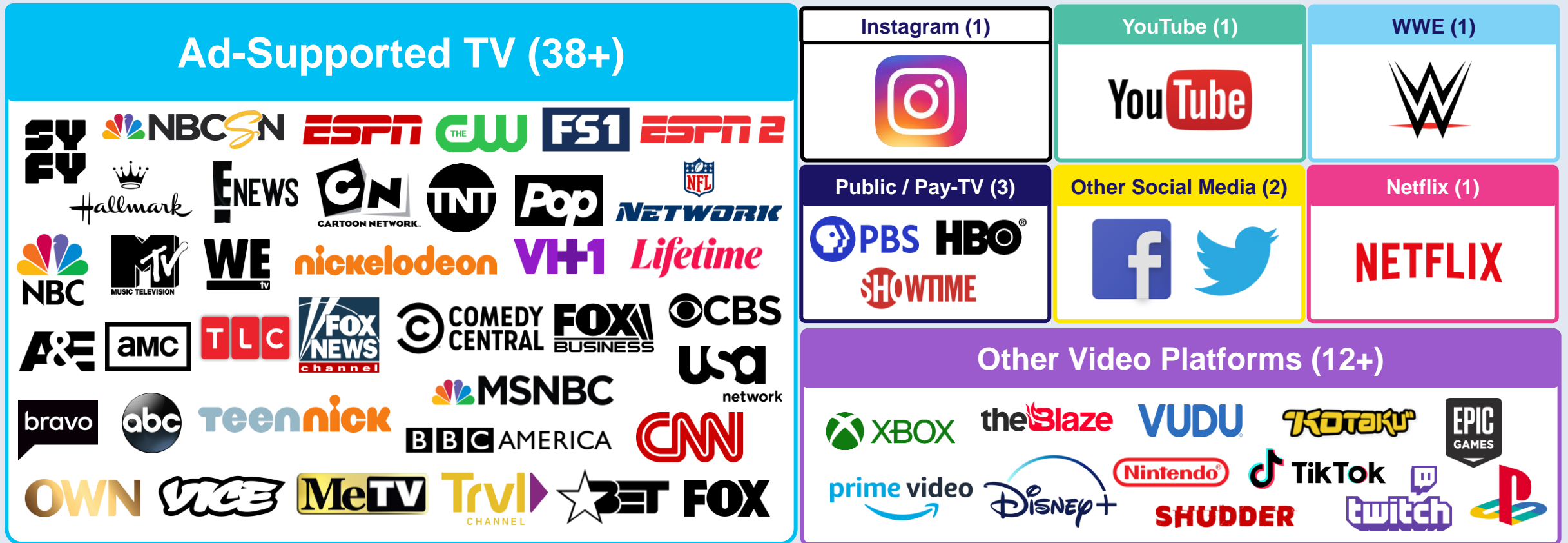
Organic Twitter Topics

- 5 · Politics · Trending
#COVIDIOT
- 2 · Politics · Trending
Chinese Virus
- 6 · News · Trending
#TrumpGenocide
- 5 · Politics · Trending
#InsiderTrading
- 9 · Trending
RIP John Prine
- 4 · Celebrities · Trending
#MyQuarantineInSixWords
- 3 · Politics · Trending
#CoronavirusLockdown
- 6 · Politics · Trending
56% of Californians
- 4 · News · Trending
#RichFolkLockdownProblems
- 2 · Trending
#TWUG

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Other Video Platforms feature Dropkick Murphy's livestreamed concert, Saturday Night Seder, The Rosie O'Donnell Show, Quarantine Radio, Kayzo Unleashed, BangBangCon, and Verizon's Pay It Forward Live. Non-Video pandemic-related tweets feature hashtags and topics that trended. Video-related pandemic topics include news programs such as town halls and the Coronavirus task force daily briefings, televised benefit concerts and other programming that is explicitly related to the pandemic.

Viewers chatted about programming on 59 different video platforms and networks

▶ 66% of adults say they are more open to trying new types of media (new streaming services, social media platforms, etc) since the COVID-19 outbreak

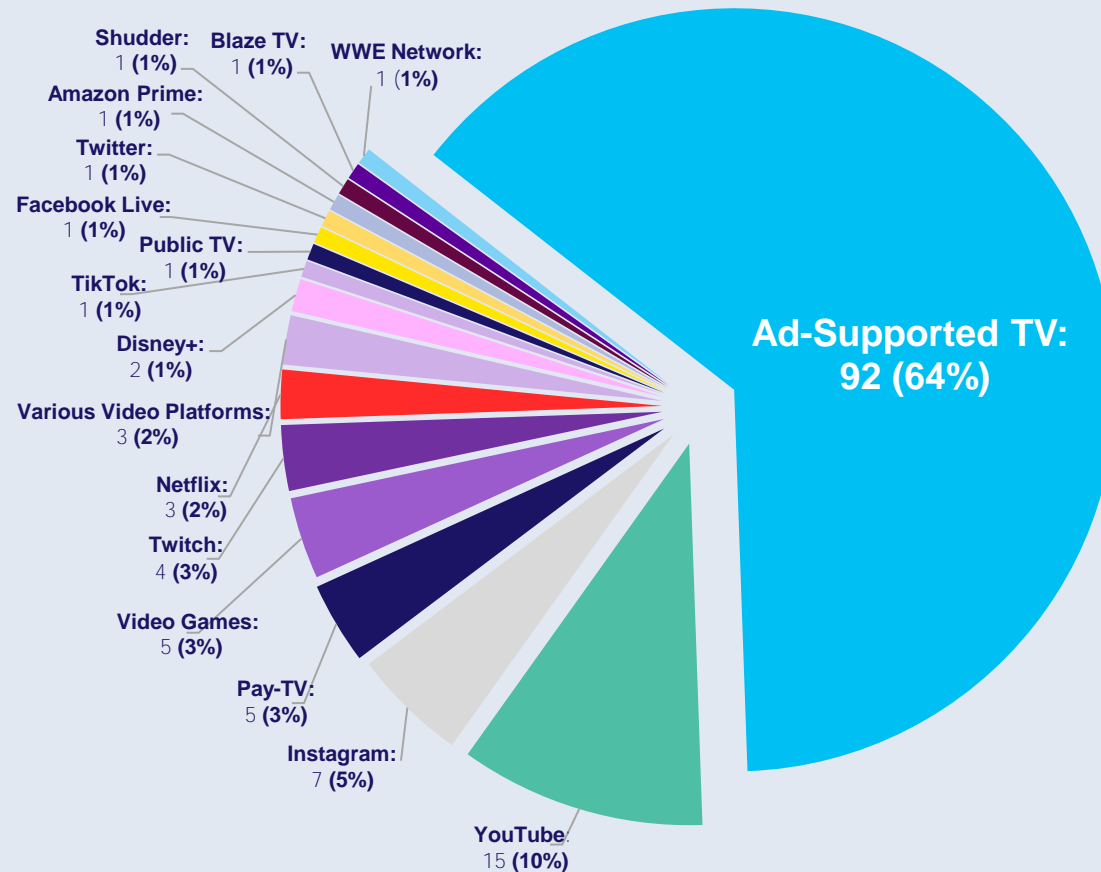


Source: VAB's 'As Time Goes By: How Media Consumption Is Helping America Cope,' VAB / Lucid 'Media Usage In The Time of COVID-19 Survey,' April 2020. Survey base: P18+ & household subscribes to cable, telco, internet TV or satellite TV (n=1,004). Q9: Thinking of your behavior during the COVID-19 Pandemic, please indicate below how much you agree or disagree with the following statements. VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Ad-supported TV Networks count (+) because TV-related news topics can be trending due to coverage across multiple TV news networks and Other Video Platforms count (+) because some events were streamed across multiple platforms. (#) = number of networks/platforms within each grouping that have trended.

Over 144 individual pieces of content trended indicating appeal across a wide variety of ages, life stages and interests

- ▶ At least one video-related topic trended everyday of the six-week analysis, covering a variety of genres including live news specials, reality TV, scripted dramas, movies, sports-related updates, gaming, music live streams, etc

% of Top 10 Trending Programs / Content by Platform

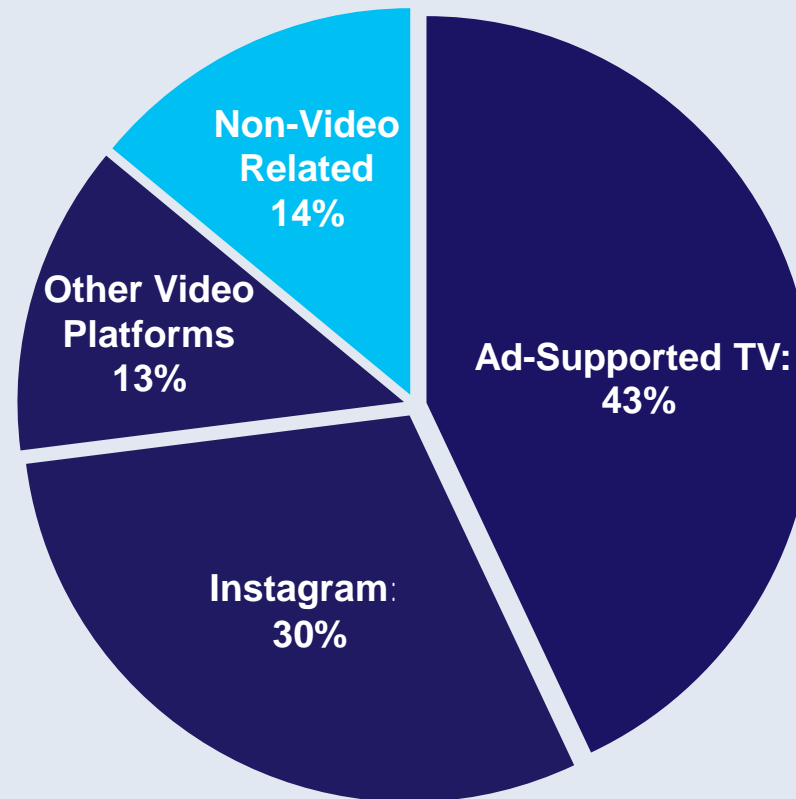


Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Various Video Platforms include Epic Games, and various concert streaming partners.

Social media is particularly popular among **multicultural audiences**, **27% of total trending topics** were related to subjects, content and programming that specifically featured people of color or a diverse cast

% of Top 10 'Diversity-Focused' Trending Topics by Platform

(March 16th – April 26th)



86% of total topics were video-based

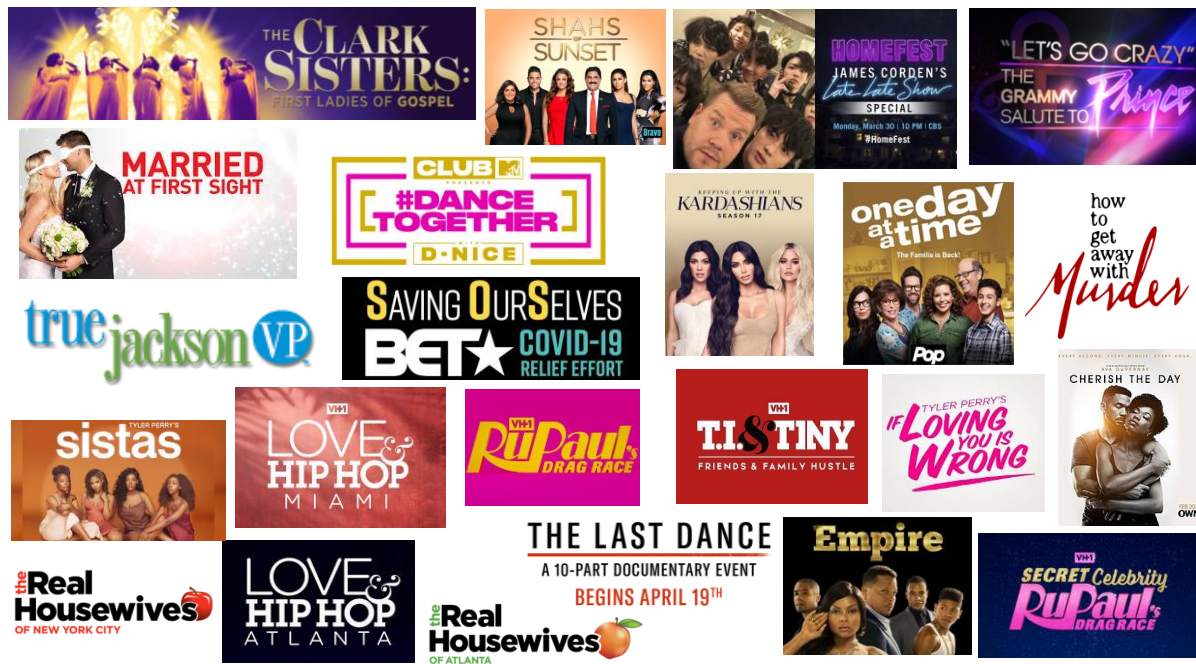
Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Other video platforms include Facebook Live, HBO, Netflix, Twitter and YouTube. NFL is excluded from the count of topics due to the mainstream nature of the sport and online conversations.

Diversity-focused social conversations during the pandemic were led by ad-supported TV, streaming programs, Instagram Live music battles, K-Pop streaming events and news about upcoming album releases

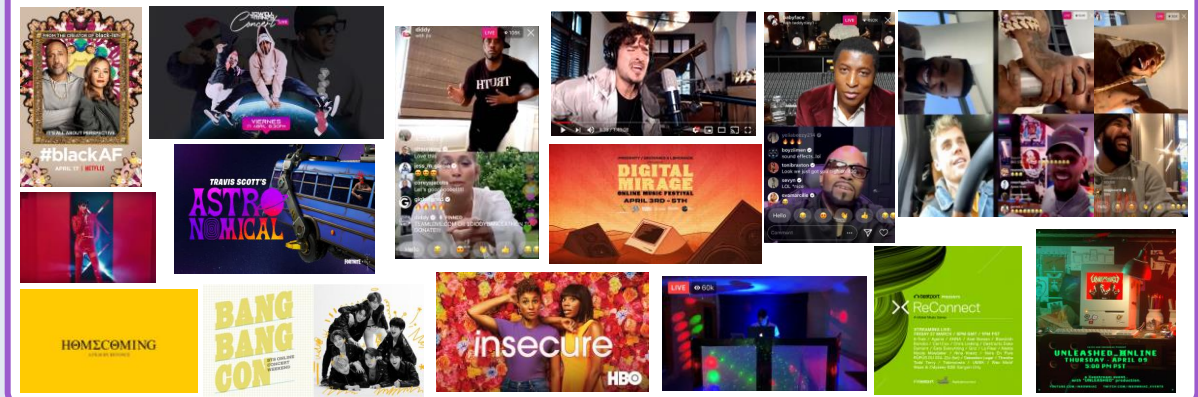
Diversity-Featured Programming / Content Trends In The Top 10 By Platform

(March 16th – April 26th)

Ad-Supported TV (23+)



Other Video Platforms (15+)



K-Pop and Album Releases (13+)



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Various Video Platforms include YouTube, Netflix, Fortnite, Facebook Live, Twitch, and HBO. Ad-supported TV Networks count (+) because TV-related news topics can be trending due to coverage across multiple TV news networks and Other Video Platforms count (+) because some events were streamed across multiple platforms. (#) = number of programs / content within each grouping that have trended. Music shown is a sampling of content. Various Video Content features Bad Bunny's music video for 'Yo Perreo Sola', Diddy and J.Lo reuniting on Instagram Live, Tommy Torres performing live via YouTube, DJ Yamil on Facebook Live, and Quarantine Radio on Instagram Live. Music features several K-Pop artists and groups including Astro, BTS, Soobin and Bebe Rexha, along with album releases from J Balvin and Kid Cudi.



Major Takeaways: Video at the Center of Culture During COVID-19

- ▶ **At 75% of trending topics, video programming and content clearly stands out in its ability to get people talking and connecting**
- ▶ **Video programming trends every day, demonstrating there is always something brand safe yet “talkworthy” to tap into**
- ▶ **The variety and number of individual pieces of content that trended indicate the enormous appeal of video – and premium video specifically - across people of different ages (especially younger adults), lifestyles and interests**
- ▶ **Multicultural audiences, in particular, are highly engaged on social media and enjoy discussing their favorite video content and TV programs within online communities**

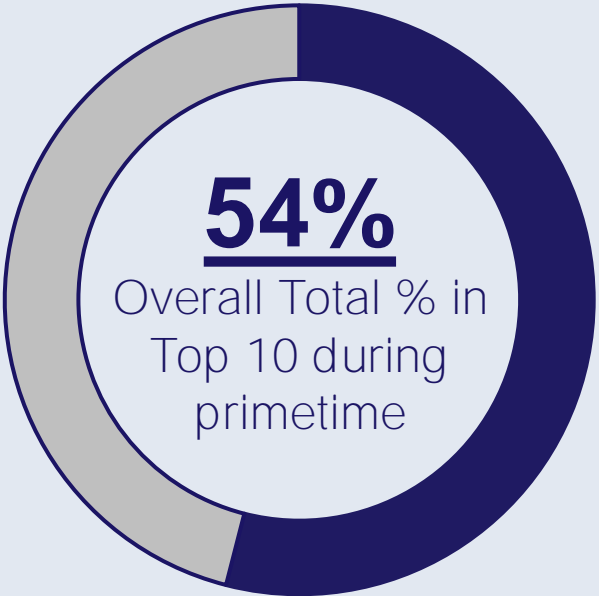
Ad-Supported TV As The Cultural Cornerstone of Society



People have always enjoyed the **communal aspect of TV viewing**, however during lockdown the next best thing to in-person contact was being **‘alone together’** within **shared-interest TV communities** on social media platforms



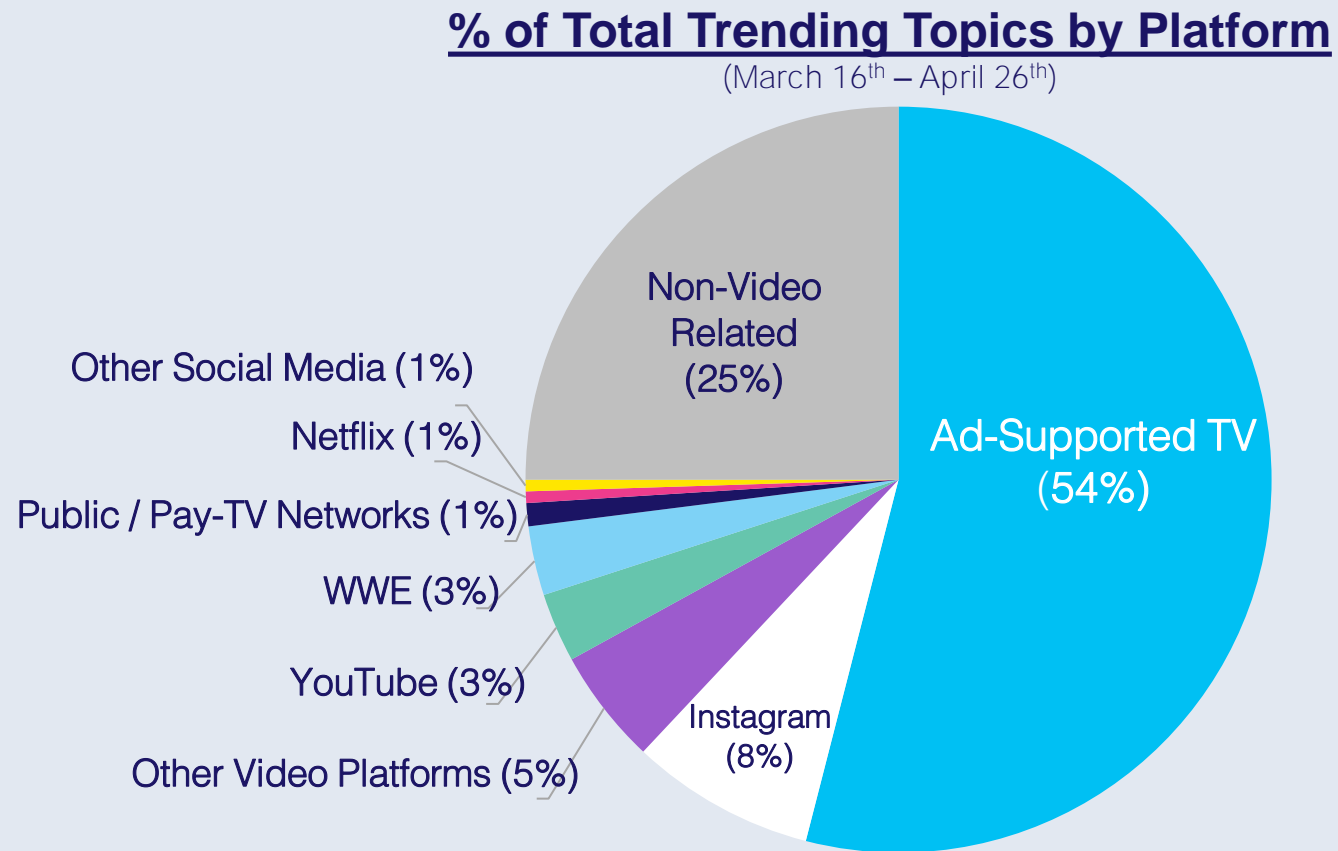
% of Ad-Supported TV Topics in the Top 10 During Primetime
(March 16th – April 26th)



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. VAB's custom study, [Committed: Exploring Millennials' Meaningful Relationship With TV Programming](#).

Therefore, it's no surprise, ad-supported TV made up **over half of all trending topics** in the Twitter top 10

▶ Across video platforms only, ad-supported TV drove **72%** of total video-related trending topics



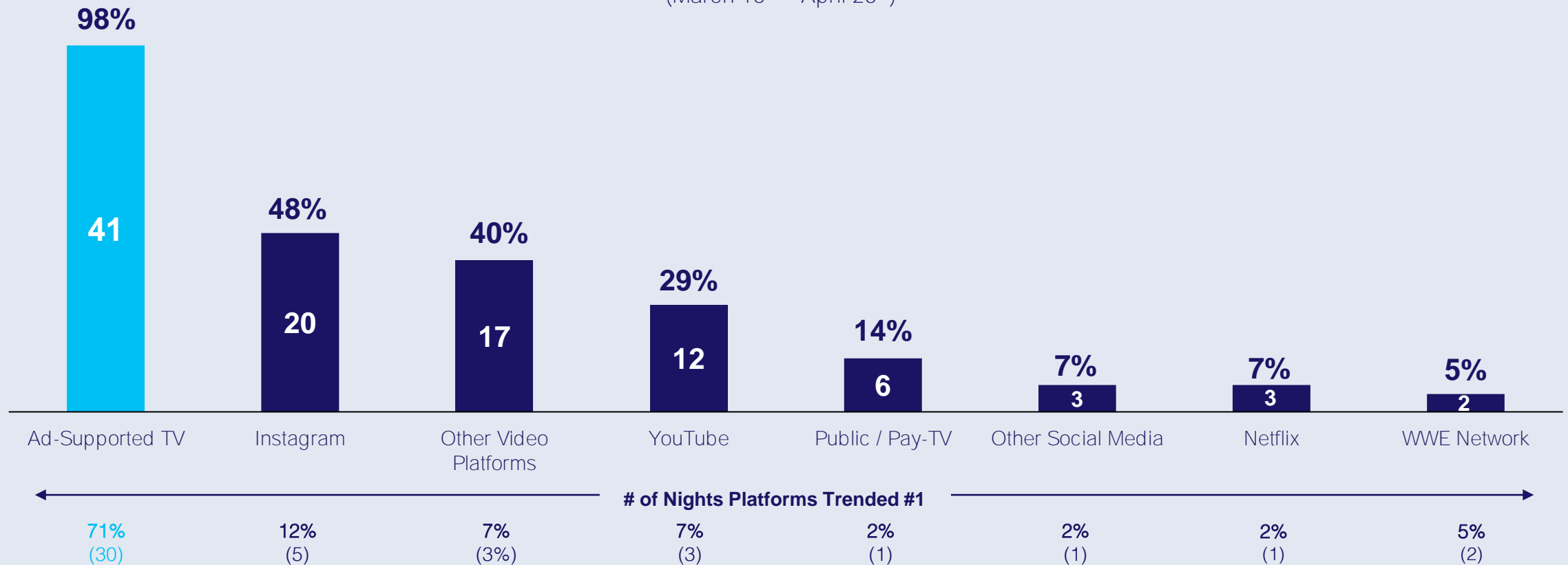
Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Other Video Platforms include Amazon Prime Video, Blaze TV, Disney+, Epic Games, Kotaku, Nintendo, PlayStation, Shudder, TikTok, Twitch, VuDu, Xbox and various concert streaming partners. Other Social Media includes Facebook Live & Twitter.

At least one **ad-supported TV** program trended almost every night while the next closest platform was **Instagram** at almost 50% of nights

► An ad-supported TV program **trended #1** on almost **three-quarters** of the nights within the six-week analysis

of Nights When Programming / Content Trended Within Top 10 Topics by Platform

(March 16th – April 26th)



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Other Social Media includes Facebook Live & Twitter. Other Video Platforms include Amazon Prime Video, Blaze TV, Disney+, Epic Games, Kotaku, Nintendo, PlayStation, Shudder, TikTok, Twitch, Vudu, Xbox and various concert streaming partners. Six week analysis = 42 days.

The 92 ad-supported TV programs that trended reflect a variety of live and recorded programming within the entertainment, sports and news genres

Ad-Supported TV Programs That Trended in the Top 10

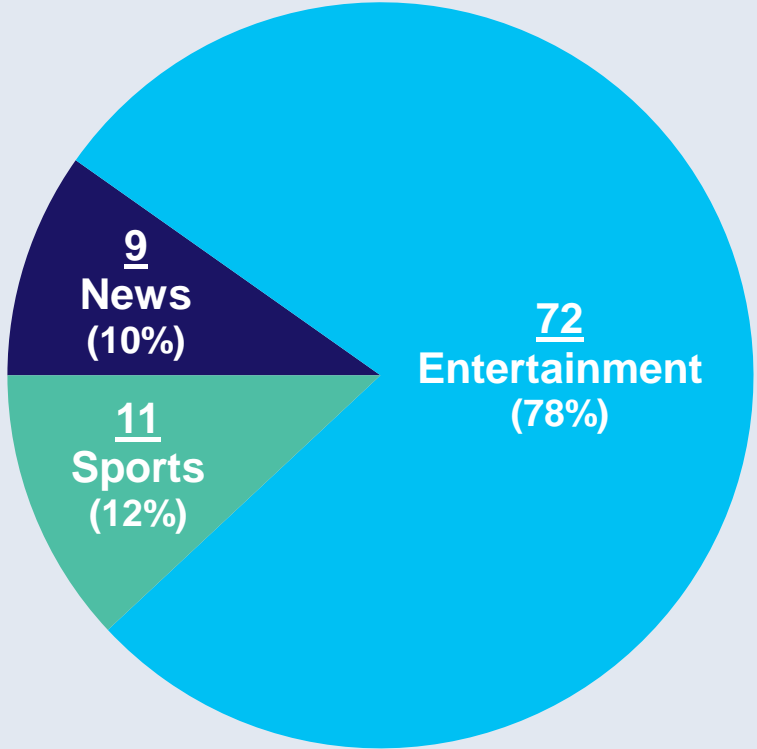


Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.

Entertainment made up over three-fourths of TV programs that trended in the top 10, filling any potential void created by the absence of live sports

Ad-Supported TV Programs by Genre Within Top 10 Trending Topics

(March 16th – April 26th)



Note: news-related trending topics had to be based primarily on a televised event to be attributed to ad-supported TV (ex. Coronavirus Task Force Briefing, Town Halls, interviews on news programs, etc)



Ad-Supported TV Topics by Genre Within Top 10 Trending Topics (March 16th – April 26th)

Genre	% of Topics
Entertainment	64%
Sports	21%
News	15%

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.

People turned to and talked about, ‘comfort’ entertainment that offered escapism, competition, community and a sense of connection while in isolation

Entertainment TV Programs Within Top 10 Trending Topics By Genre

‘At-Home’ Concerts



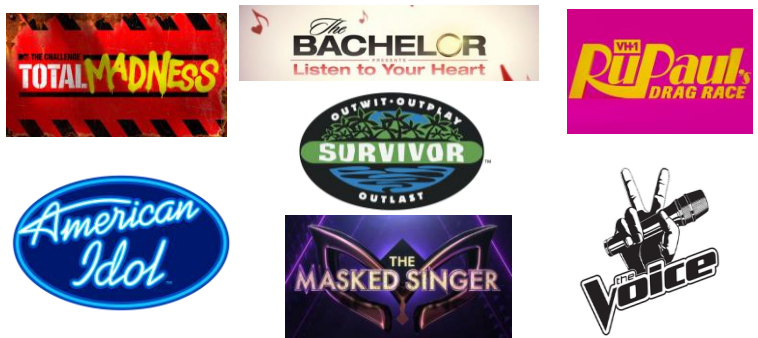
Escapism (Drama & Comedy)



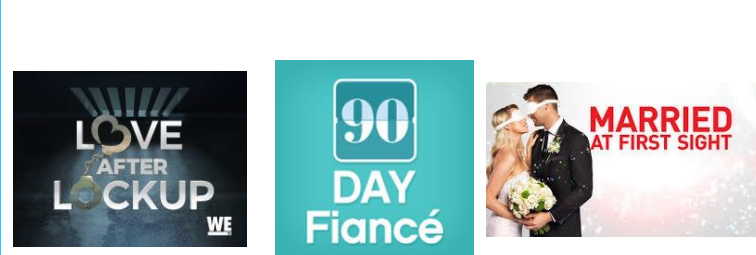
Reality



Competition



Relationship / Dating



Wrestling



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics

Many of these conversations became a **daily ritual** each week throughout the lockdown

- ▶ This 'appointment TV' extended to an appointment with their devices as well so that viewers could connect and engage with fellow fans each week on social media during isolation

Ad-Supported TV Programs That Trended in the Top 10 During at Least 3 of the 6 Weeks Analyzed*



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Programs shown represent programs that trended on the same day of the week in at least 3 of the 6 weeks monitored. *Not all programs aired throughout the entire six-week analysis, therefore we've also included programs that trended at least twice when it represented at least half of their episodes during the time period: : Monday - The Bachelor: Listen to Your Heart, Supernatural, Manifest; Tuesday - This Is Us, Schitt's Creek; Wednesday - The Challenge: Total Madness; Thursday - Grey's Anatomy, The Real Housewives of NYC; Friday - Blue Bloods; Sunday - The Walking Dead, The Last Dance.

Virtually every night of the week, the majority of Twitter's top 10 trending topics were about ad-supported TV

Six-Week Time Period: % of Total Top 10 Trending Topics that are Based on Ad-Supported TV Content

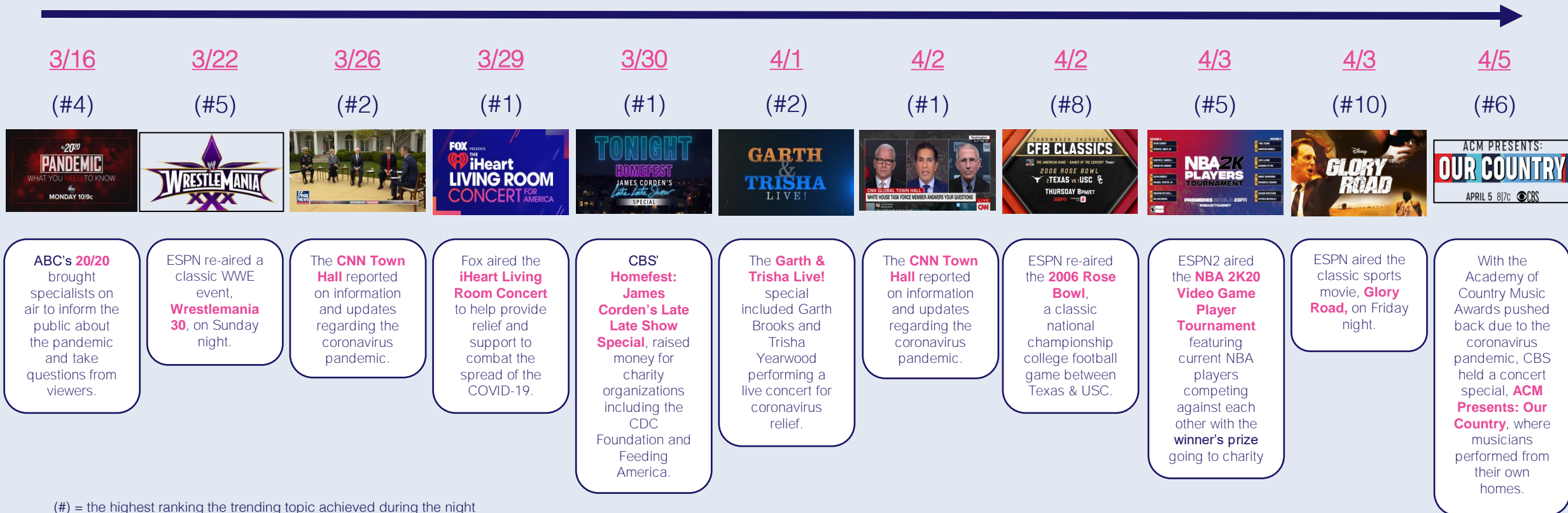
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Average	68%	37%	63%	63%	60%	28%	58%
<u>w/o 3/16</u>	70%	35%	60%	30%	55%	15%	40%
<u>w/o 3/23</u>	90%	45%	55%	40%	60%	15%	55%
<u>w/o 3/30</u>	80%	35%	50%	80%	60%	0%	35%
<u>w/o 4/6</u>	60%	15%	65%	55%	60%	50%	55%
<u>w/o 4/13</u>	70%	30%	60%	80%	45%	50%	90%
<u>w/o 4/20</u>	40%	60%	85%	95%	80%	40%	70%

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.

Since the start of the pandemic many ad-supported TV networks aired news specials to inform and special performances and programs to entertain...

Live concerts featuring ‘living room performances’ replaced award shows and helped raise money for COVID relief while classic sports and gaming / esports have replaced live sports

Ad-Supported TV ‘Specials’ That Trended in the Twitter Top 10 (March 16th – April 8th)

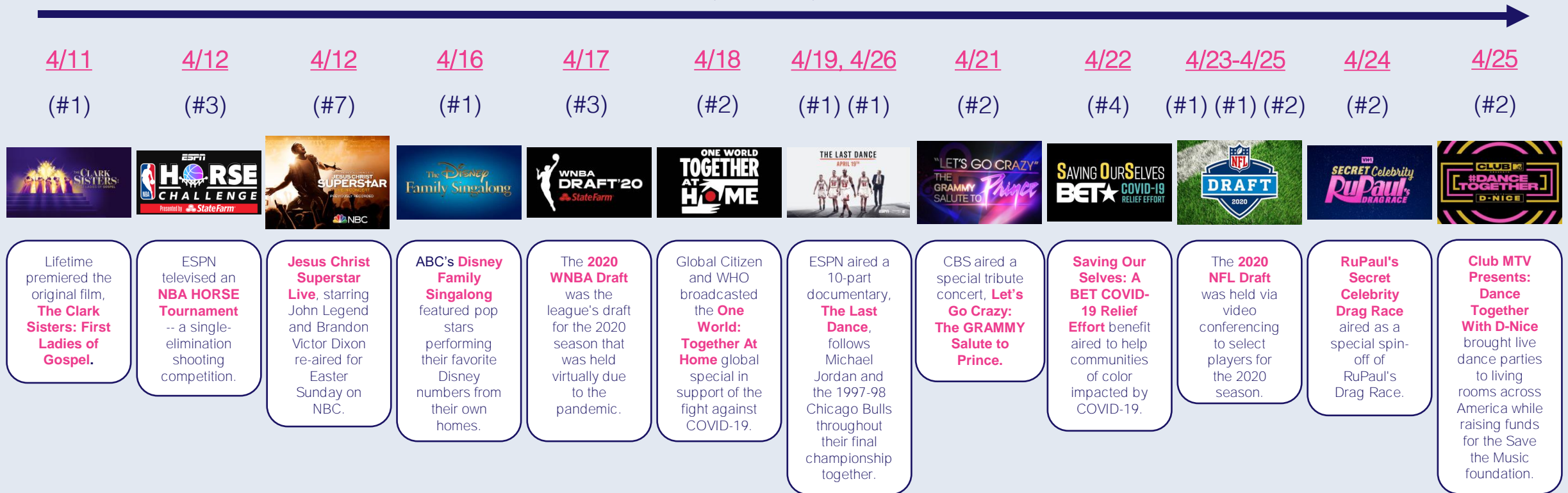


(#) = the highest ranking the trending topic achieved during the night

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/8/2020). Results include both 'direct' and 'related' topics.

TV networks stepped up their cultural presence by increasing the amount of ‘specials’ in support of COVID-19 relief efforts while providing fans with more sports content

Ad-Supported TV ‘Specials’ That Trended in the Twitter Top 10 (April 9th – April 26th)



(#) = the highest ranking the trending topic achieved during the night

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (4/9/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.

Just because there weren't live sports being played, **doesn't mean there wasn't sports to talk about** throughout the lockdown

- ▶ Even with the cancellation of almost all live events, nearly **three-fourths of sports fans** say they are watching more or the same amount of TV during the pandemic



Sampling of Sports Programming That Trended In The Top 10

(March 16th-April 26th)

- 1 **3/16 -19, 3/24, 4/1,4/9, 4/21 (#1 on 3/16):** NFL Free agency was buzzing on social media during w/o 3/16 and 3/23 fueled by continual breaking news from top NFL insiders – ESPN's Adam Schefter & NFL Networks' Ian Rapoport.
- 2 **4/2-3 (#8 on 4/2):** ESPN aired classic sporting events like the 2006 Rose Bowl and classic sports movies like *Glory Road*.
- 3 **4/3 (#5):** ESPN / ESPN2 aired the NBA 2K20 Player Tournament featuring current NBA players competing against each other remotely on the video game.
- 4 **4/12 (#3):** The NBA held a HORSE competition featuring past and present players from the NBA and WNBA filmed remotely at their homes.
- 5 **4/17 (#3):** The 2020 WNBA Draft was held remotely across teams.
- 6 **4/19, 4/26 (#1):** ESPN's 10-part documentary, "The Last Dance," chronicles Michael Jordan and the 1997-98 Chicago Bulls during their final championship together.
- 7 **4/23-25 (#1):** The 2020 NFL Draft was held remotely via video conferencing across teams.

(#) = the highest ranking the trending topic achieved during the night

Source: VAB's 'As Time Goes By: How Media Consumption Is Helping America Cope', VAB / Lucid 'Media Usage In The Time of COVID-19 Survey,' April 2020. Survey base: P18+, household subscribes to cable, telco, internet TV or satellite and viewers that previously watched live sports (n=797). Q12: Due to COVID-19 virtually all live sports have been pulled off the air. As a result, are you watching more, less or the same amount of TV? Excludes respondents who did not watch live sports. VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/15/2020 – 4/8/2020). Results include both 'direct' and 'related' topics.

TV news network-hosted **town halls** and the daily telecasts of the **Coronavirus task force briefings** also made for popular conversations

- ▶ Viewers are hungry for up-to-the-minute news to stay informed: **74%** of consumers **check the news multiple times a day** for updates and **49%** have **at least one TV** in their home **set to a news channel at all times**



Sampling of News Programming That Trended In The Top 10

(March 16th-April 26th)

- 1 **3/16 (#4)**: David Muir and Dr. Jennifer Ashton host a live coronavirus special, **ABC 20/20 COVID-19: Pandemic: What You Need to Know**, in order to hear from and inform viewers.
- 2 **3/19 (#3)**: **Tucker Carlson Tonight** featured opinions from different guests on whether lockdowns should continue.
- 3 **3/24 (#1)**: During a **Fox News Town Hall**, President Trump and several advisors gave updates regarding the COVID-19 pandemic.
- 4 **3/26 (#2)**: **CNN's Global Town Hall** featured Dr. Anthony Fauci, Dr. Sanjay Gupta, and Anderson Cooper answering questions from the public regarding COVID-19.
- 5 **3/27 (#10)**: On **Trish Regan Primetime**, Regan shared her thoughts on the coronavirus pandemic.
- 6 **4/12 (#10)**: **Fox News Sunday with Chris Wallace** shares his opinion on Trump's response to the COVID-19 pandemic.
- 7 **4/22 (#6)**: The mayor of Las Vegas called for hotels and casinos to be reopened in an interview on **Anderson Cooper 360**.

(#) = the highest ranking the trending topic achieved during the night

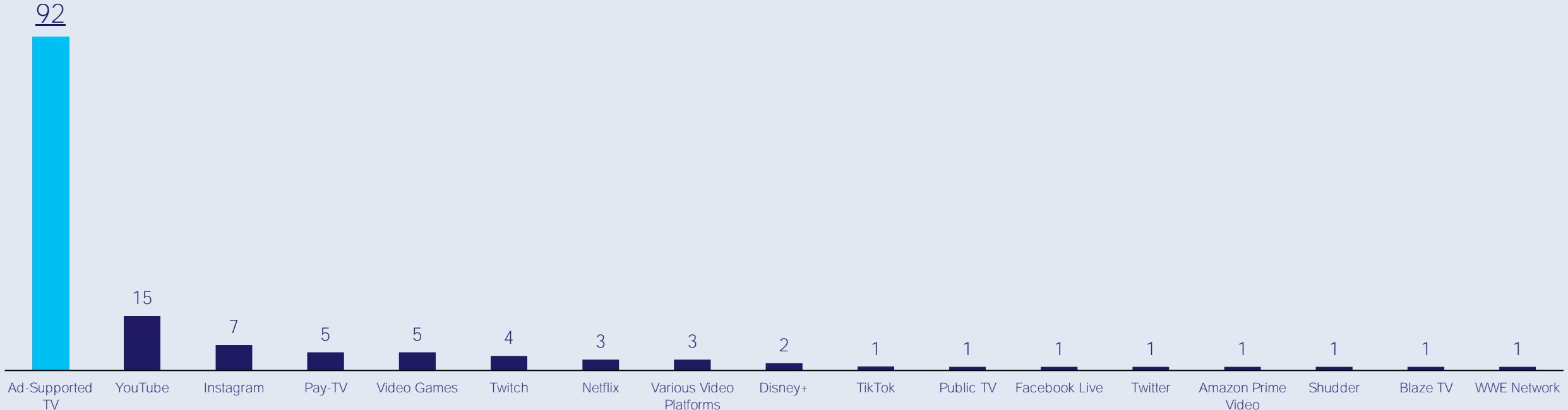
Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/15/2020 – 4/8/2020). Results include both 'direct' and 'related' topics. Percentages come from VAB's 'As Time Goes By: How Media Consumption Is Helping America Cope'. VAB / Lucid 'Media Usage In The Time of COVID-19 Survey,' April 2020. Survey base: P18+ & household subscribes to cable, telco, internet TV or satellite TV (n=1,004). Q6: Thinking of your behavior during the COVID-19 Pandemic, please indicate below how much you agree or disagree with the following statements & Q7: Thinking of your behavior since the start of COVID-19, please indicate below how much you agree or disagree with the following statements. , top 2 box (agree completely or agree somewhat)

Ad-supported TV's ability to **quickly adapt** and produce fresh, timely, quality content resulted in the highest levels of engagement of any platform

▶ Although Netflix shows like *Tiger King* and *Ozark* no doubt also entered the cultural zeitgeist during the early days of the lockdown, they didn't garner the same level of concurrent conversations or 'simultaneous community' since people could view these series on their own time

of Unique Top 10 Trending Programs / Content by Video Platform

(March 16th – April 26th)



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Various Video Platforms include Epic Games, and various concert streaming partners. Pay-TV: Insecure (HBO), Westworld (HBO), Homeland (Showtime). Netflix - #BlackAF, Extraction, Homecoming: A Film by Beyoncé. Disney - Onward. Amazon Prime Video - Happiness Continues: A Jonas Brothers Concert Film.



Major Takeaways: **Ad-Supported TV As The Cultural Cornerstone of Society**

- ▶ **Many programs have become consistent ‘appointment TV’ and fresh content like specials, benefits and town halls rally us as a community**
- ▶ **During the lockdown, entertainment programming has filled the social conversation void left by the absence of daily sports**
- ▶ **However, despite the lack of live sports, sports-related programming (news, talk, retrospectives and other ancillary content) continues to inspire conversation and is a good opportunity to connect with passionate fans**
- ▶ **News content also inspires online discussion and healthy debate**

Video & Beyond: A Deeper Dive Into Culture During COVID-19



Beyond ad-supported TV, three other major topics consistently spark conversation on Twitter

Music



Movies

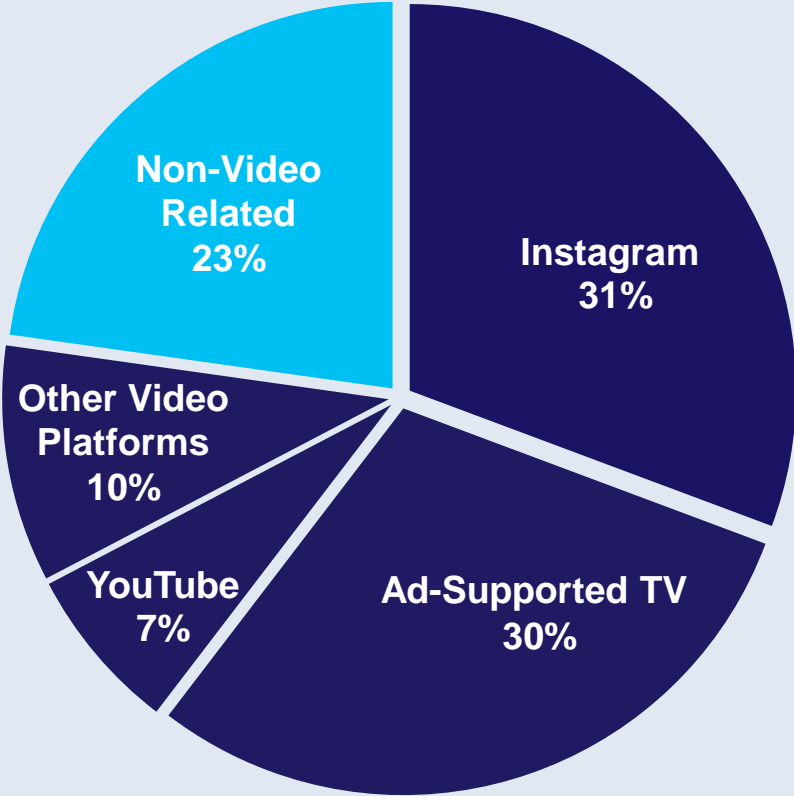


Video Games



24% of all trending topics on Twitter were music-related, driven by video content produced through Instagram and ad-supported TV

% of Top 10 'Music-Related' Trending Topics by Platform
(March 16th – April 26th)



77% of total topics were video-based

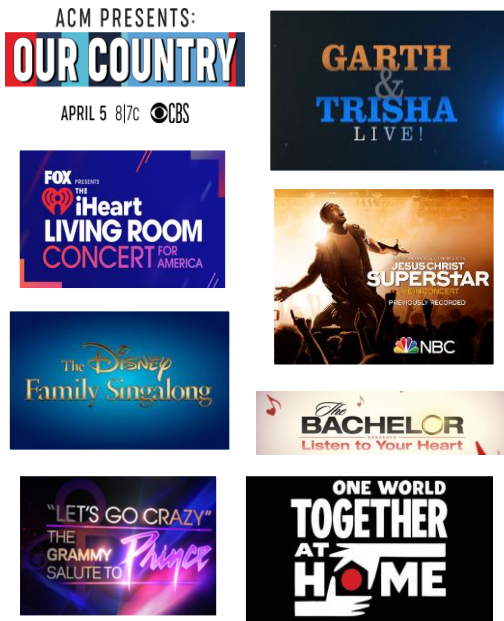
Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Other video platforms include Amazon Prime Video, Epic Games, Facebook Live, Netflix, PBS, Twitter, Twitch and various other streaming platforms.

Specials, live-streamed performances, DJ battles and the latest news on musicians and album releases has people continually chatting about music online

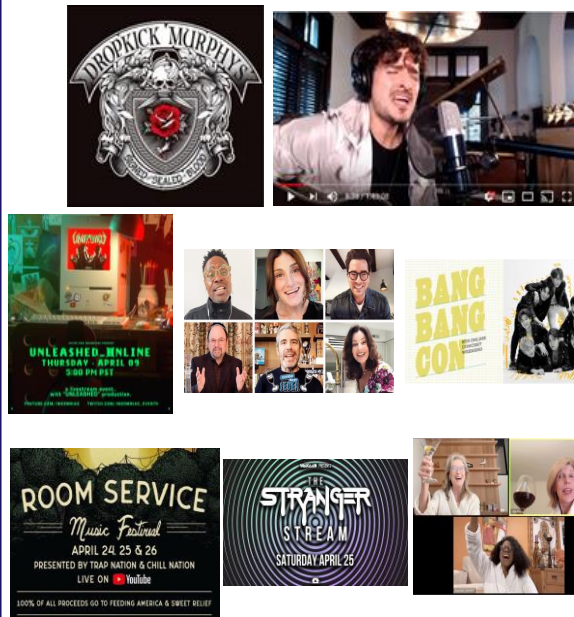
Music-Related Trends In The Top 10 By Platform

(March 16th – April 26th)

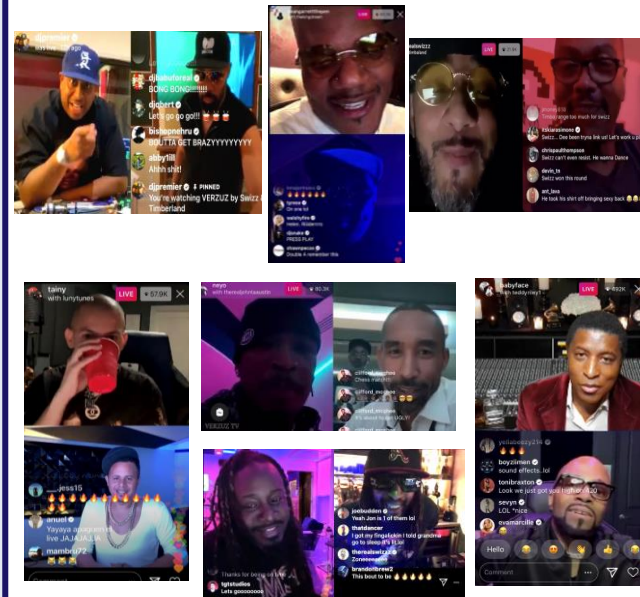
Ad-Supported TV Music Programs & Specials



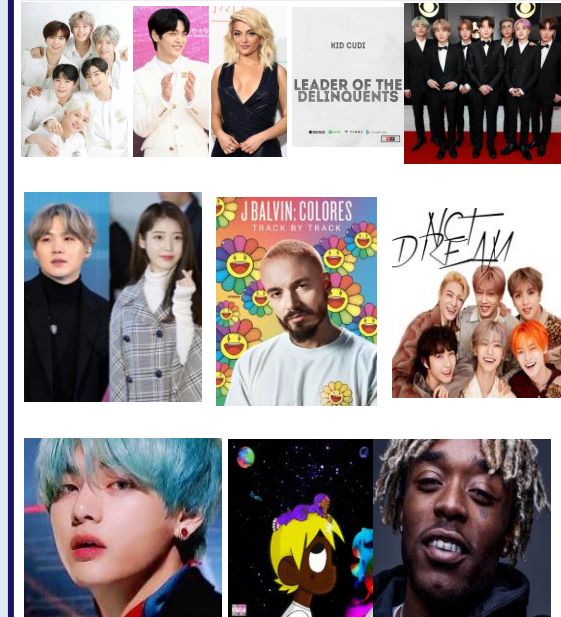
Live-Streamed Performances



Instagram Live Music Battles



K-Pop News and Album Releases

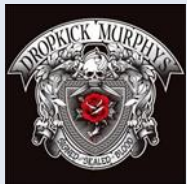


Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Various Video Platforms include YouTube, and various concert streaming partners. Live-Streamed Performances include Tommy Torres, Saturday Night Seder, and Take Me To The World. Instagram Live music battles feature DJ Premier vs. RZA, Sean Garret vs. The Dream, Swizz vs. Timbaland, Tainy vs. Lunny Tunes, Neyo vs. Johnta, Lil Jon vs. T-Pain, and Babyface vs. Teddy Riley. Non-Video Music include Astro, Soobin and Bebe Rexha, Kid Cudi, BTS, IU and Suga, J Balvin, NCT Dream, Kim Taehyung, and Uzi

Music-related 'event' video content that sparked online conversation ranged from musicians streaming **virtual concerts** to Broadway actors and celebrities **performing live from their homes**

Video Streaming 'Special' Content That Trended in the Twitter Top 10 (March 16th – April 26th)

3/17
(#3)



Dropkick Murphy's live streamed their annual **St. Patrick's Day concert** across various platforms.

3/18
(#1)



Beyoncé fans were encouraged to join a Twitter watch party for her 2019 Netflix documentary, **Homecoming**, conversation was further fueled when Beyoncé retweeted in support.

3/22
(#7)



The Rosie O'Donnell Show came back for a one-night special return through Broadway.com and their YouTube channel with celebrities live streaming from their homes to benefit the Actors Fund to provide aid during the coronavirus outbreak.

3/26
(#1)



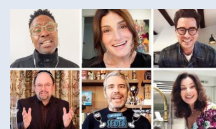
Dave Matthews live streamed a concert on Twitter for **Verizon's 'Pay It Forward Live' weekly livestream** event which features musicians performing from their living rooms to support small businesses.

4/9
(#2)



DJs Kayzo and Insomniac performed **Unleashed – Online** via YouTube.

4/11
(#2)



The **Saturday Night Seder** had Broadway stars, actors, and celebrities performing and supported the effort to combat the spread of the COVID-19 virus.

4/17-4/18
(#1) (#6)



The **BANGBANGCON** streaming event provided fans with an at-home BTS concert experience.

4/24
(#8)



The Jonas Brothers crashed Zoom calls hosting viewing parties for their new movie that premiered on Amazon Prime Video, **Happiness Continues: A Jonas Brothers Concert Film**.

4/25
(#6)



The **Room Service Music Festival** raised money for Feeding America and Sweet Relief while bringing back the festival experience to music lovers.

4/26
(#1)



Broadway.com and their YouTube channel hosted a virtual concert, **Take Me To The World**, to celebrate the 90th birthday of legendary composer Stephen Sondheim.

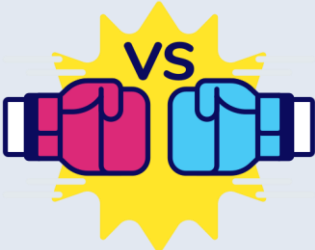
(#) = the highest ranking the trending topic achieved during the night

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (4/9/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.

Instagram, fueled by regular **real-time music battles** between artists, was the second most popular video platform during this time period

▶ With production and public performances at a halt, artists brought old school hip-hop 'beat battles' to Instagram Live featuring popular songs which garnered attention and engagement across social media platforms

Instagram Live Music / Verzuz* Battles In The Top 10 Trending Topics (March 16th – April 26th)



Rory vs. Mal 3/22 (#3)

Swizz vs. Timbaland 3/24 (#5)

Boi-1da vs. Hit-Boy 3/27 (#10)

Sean Garrett vs. The Dream 3/28 (#1)

***Verzuz** = a real-time, virtual DJ battle on Instagram Live that pits R&B and hip-hop icons against each other in friendly competition and collaboration curated by Swizz and Timbaland.

Neyo vs. Johnta 3/29 (#2)

Manny Fresh vs. Scott Storch 4/1 (#7)

Lil John vs. T-Pain 4/4 (#1)

DJ Premier vs. RZA 4/11 (#3)

Tainy vs. Luny Tunes 4/17 (#7)

Babyface vs. Teddy Riley 4/18 (#1)

Hezekiah Walker vs. John P. Kee 4/26 (#10)

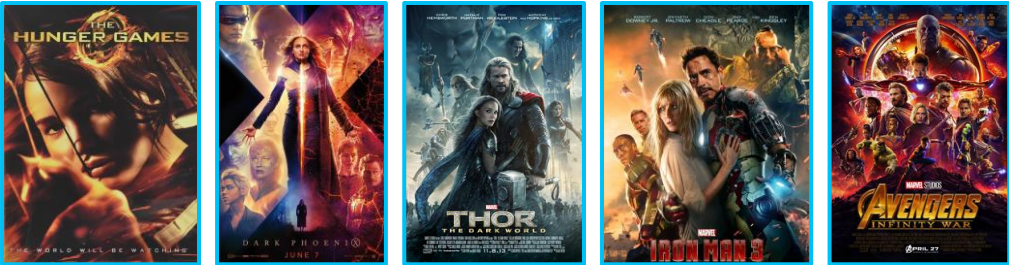
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Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Sampling of Instagram live music battles from [Vulture](https://www.vulture.com).

Anxious for an outlet to discuss films in the wake of cinema closures, movie fans used social media to host **watch parties** and bond over **memories** from their favorite movie franchises and actors

Movie-Related Trends In The Top 10 During Six-Week Time Period (March 16th – April 26th)

Movie-Related Conversations Online



'Stay At Home' Watch Parties



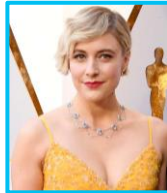
Actor-Related Fan Engagement (rankings, polls, etc)



Sam Rockwell



Natalie Portman



Greta Gerwig



Andy Samberg



Jessica Chastain

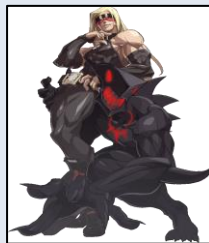
Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.

Video games are also a popular cultural genre as fans connect with each other through new games, share communal experiences and discuss upcoming releases

Video Game Trends In The Top 10 During Six-Week Analysis

(March 16th – April 26th)

3/19 (#2) GameStop	3/21 (#2) Zato	3/28 (#3) #AnimalCrossing NewHorizons	3/31 (#1) #SonicXbox Sweepstakes	4/7 (#3) Xbox Controller	4/11 (#9) #RIPFortnite	4/15 (#6) GTA 6	4/23 (#10) Travis Scott
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GameStop claims it is 'essential retail' in order to remain open amid coronavirus shutdowns

A new trailer for the upcoming video game **Guilty Gear Strive** reveals the addition of characters Millia Rage and Zato-1.

Due to people being confined to their homes, **Animal Crossing: New Horizons** saw a spike in users and hours played.

The Sonic Movie **Xbox Console Sweepstakes** is given away to a select number of fans.

Sony reveals the new **PS5** 'DualSense' controller.

Fortnite is challenged by the release of new yet similar games such as Valorant.

Reports surface that the long-awaited **Grand Theft Auto VI** is 'early in development.'

Travis Scott and **Fortnite** collaborated to debut *Astronomical*, a 'one of a kind musical journey.'

(#) = the highest ranking the trending topic achieved during the night

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.



Major Takeaways: Video & Beyond – A Deeper Dive Into Culture During COVID-19

- ▶ **Capitalizing on consumers' thirst for content and their exploration of new media technology, streaming platforms have entered the cultural conversation by showcasing special performances and creating online watch parties**
- ▶ **Music transcends platforms but is most popular through Instagram and ad-supported TV**
- ▶ **Lacking the ability to go to a movie theater, people have been participating in online movie watch parties and discussing popular movie franchises**
- ▶ **With more time to play, video gamers are actively discussing the latest games and sharing strategies**

What Marketers Need To Know



Tie into Virtual Communal Gatherings

The rise of movies and TV watch parties, live music battles and performances and video game competitions mean communities of like-minded viewers are tuning into (virtually) together.

How can your brand find its audience and organically integrate into these gatherings?



Build connections via ritual TV

As time at home settles into a new norm, “appointment TV” and talking about it on Twitter have become ritualized behaviors the viewers engage in week after week.

How can your brand naturally create second screen activations to build relationships with these engaged and attentive viewers?



Diversity of conversation and trending topics

With conversation sparked across a variety of platforms, networks, programs and genres, marketers can be assured of finding advertising opportunities to engage its viewers regardless of their demographic, lifestage or interests.



Video offers brands ‘safe spaces’ on social media

Video-related trending topics – whether based on TV shows, streaming programs or music – generally exist in fun, lighthearted environments which offers marketers ‘safe spaces’ to engage audiences - especially younger, multicultural adults - on social media platforms.

Thank You

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A Deeper Look At The Video and
Ad-Supported TV Conversations



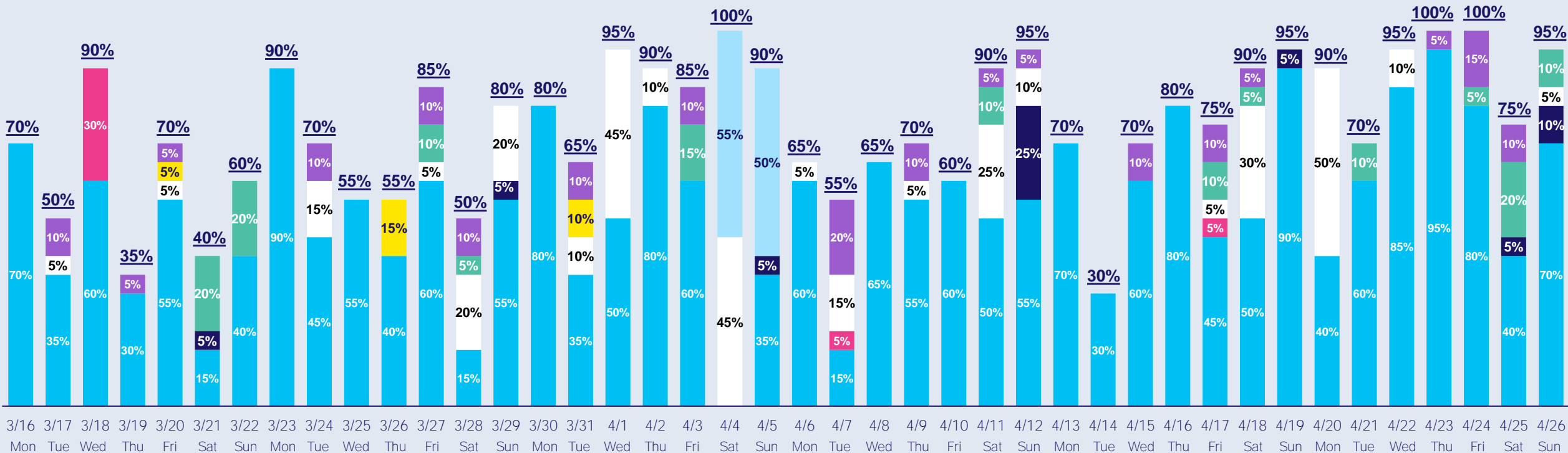
With 'stay at home' orders in effect across much of the country, **any day of the week offered 'buzz-worthy' video content** for people to talk about

► Six-week time period average by day: Monday (78%), Tuesday (57%), Wednesday (78%), Thursday (72%), Friday (79%), Saturday (74%), Sunday (86%)

% of Top 10 Trending Topics Based on Video Content

(March 16th – April 26th)

■ Ad-Supported TV ■ Public / Pay-TV ■ Netflix ■ Instagram ■ Other Social Media ■ YouTube ■ WWE Network ■ Other Video Platforms



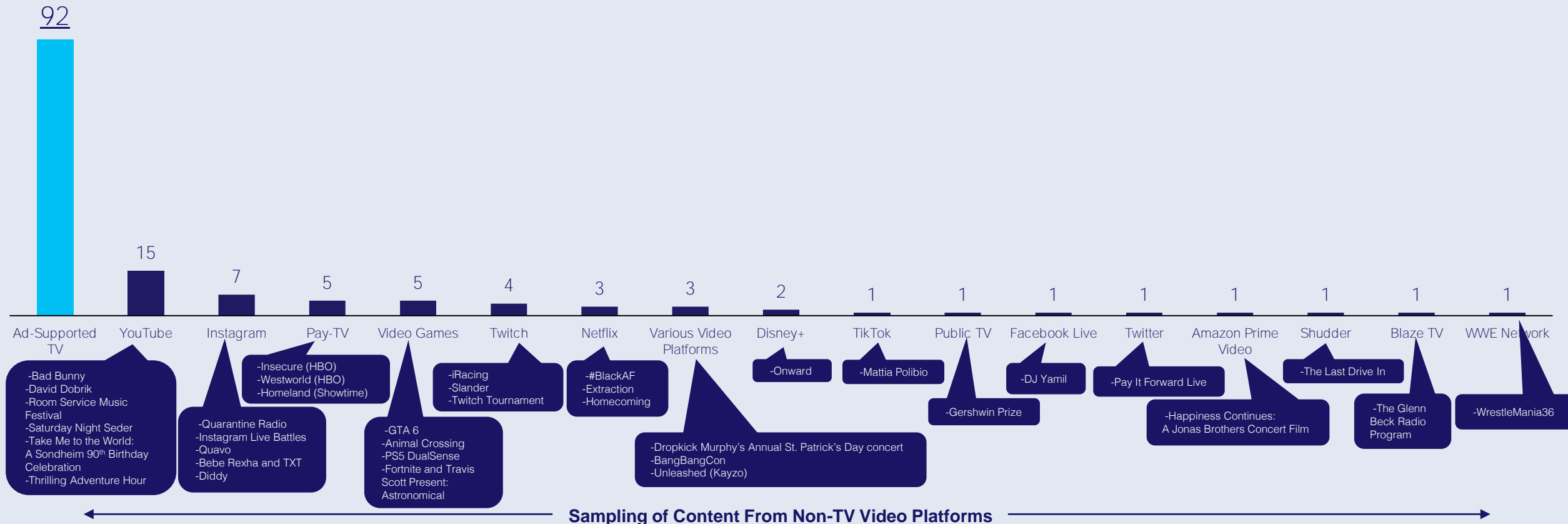
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When it comes to video content, nothing else spurs culture, community, connection and conversation at scale like **ad-supported TV programs**

▶ Although Netflix shows like *Tiger King* and *Ozark* no doubt also entered the cultural zeitgeist during the early days of the lockdown, they didn't garner the same level of concurrent conversations or 'simultaneous community' since people could view these series on their own time

of Unique Top 10 Trending Programs / Content by Video Platform

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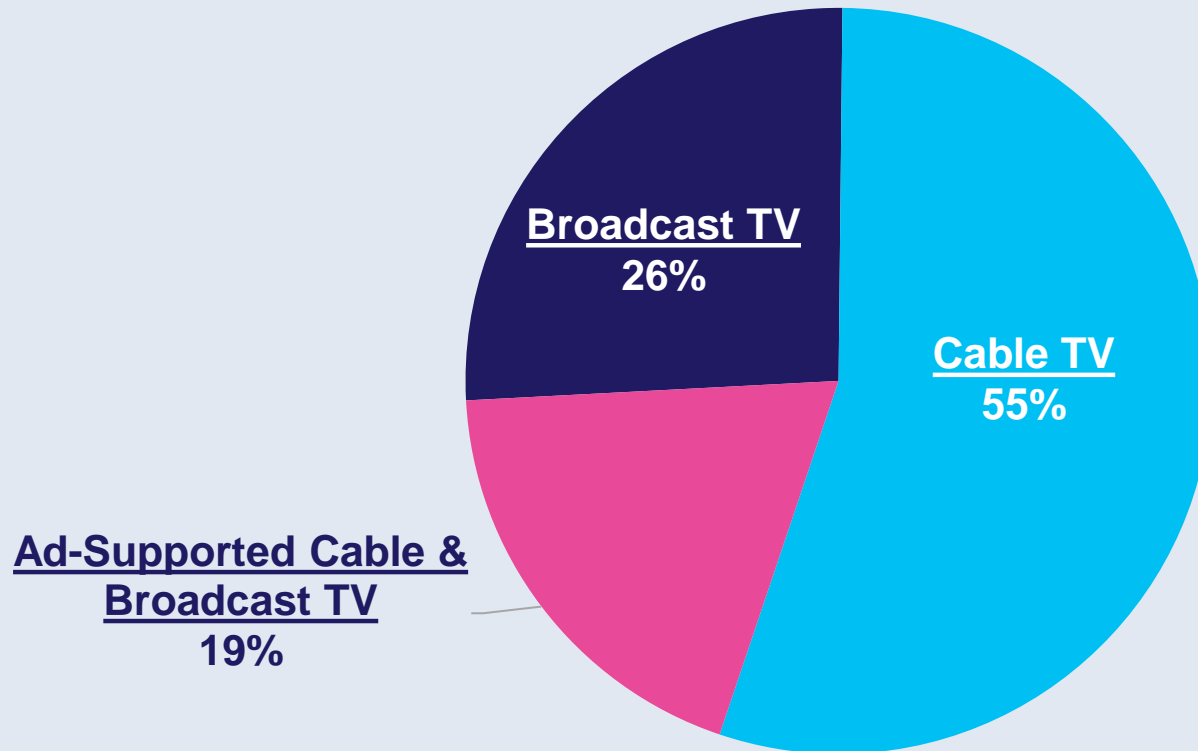


Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Various Video Platforms include Epic Games, and various concert streaming partners.

Of the total ad-supported TV topics that trended in the Top 10, **three-quarters (74%)** reflected programming that aired on cable TV

% Breakout of Ad-Supported TV Topics by Medium

(March 16th – April 26th)



*Ad-supported Cable & Broadcast TV topics involve programs that were mentioned or aired on various networks such as popular news events and the 2020 NFL Draft

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.

Four in ten (40%) of the total top 10 trending topics involved programming that aired on ad-supported cable TV

► Mondays, Sundays and Thursdays were the most popular days

Six-Week Time Period: % of Top 10 Trending Topics That Reflect Ad-Supported Cable TV Content

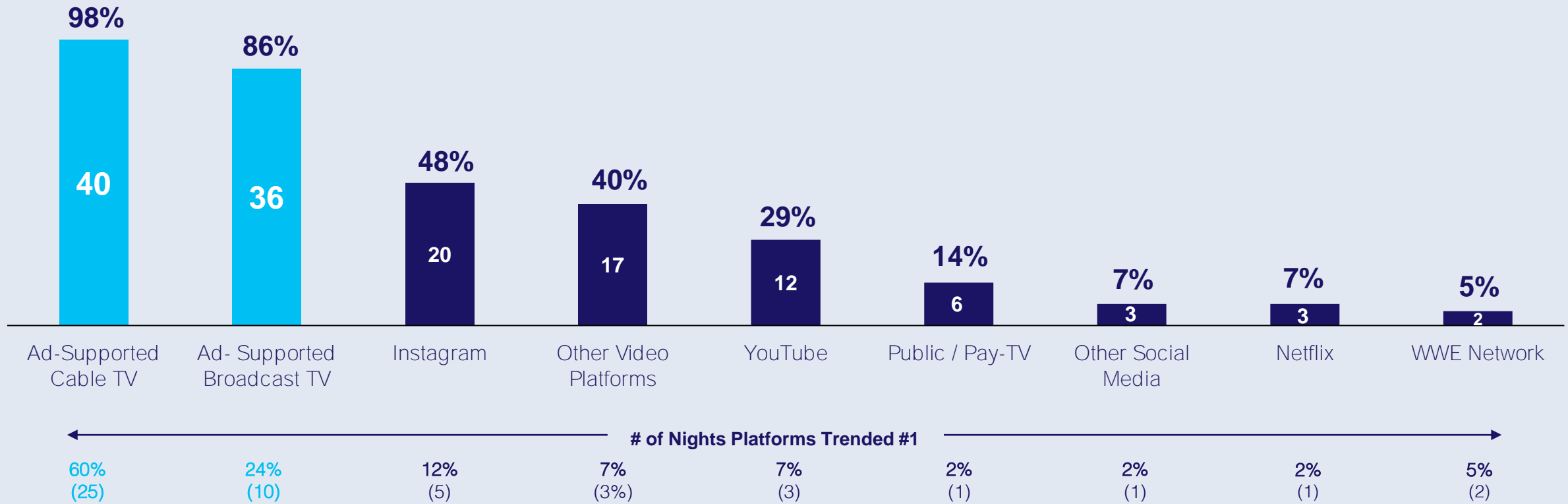
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Average	53%	26%	40%	43%	40%	23%	53%
<u>w/o 3/16</u>	50%	25%	30%	20%	40%	0%	40%
<u>w/o 3/23</u>	80%	35%	30%	25%	30%	10%	45%
<u>w/o 3/30</u>	55%	25%	25%	70%	30%	0%	25%
<u>w/o 4/6</u>	55%	10%	35%	20%	40%	45%	50%
<u>w/o 4/13</u>	55%	30%	50%	30%	30%	50%	90%
<u>w/o 4/20</u>	20%	30%	70%	95%	70%	35%	65%

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. . Ad-supported Cable TV includes Cable/Broadcast topics involve topics that were mentioned or aired on various networks such as popular news events and the 2020 NFL Draft.

Not only did ad-supported cable TV trend **nearly every day** but cable-related topics trended at #1 for **over half** of the nights analyzed

of Nights When Programming Trended in Top 10 Topics by Platform

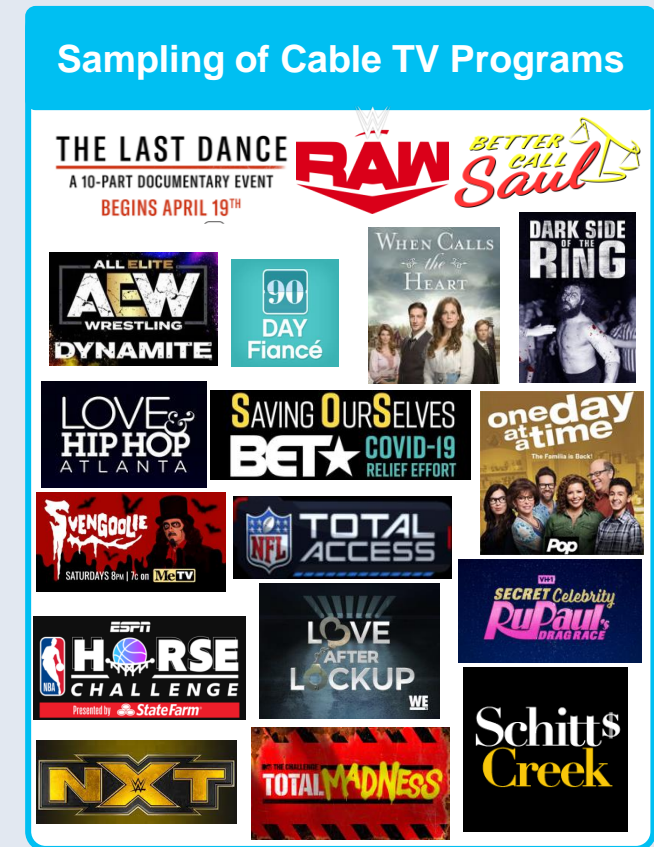
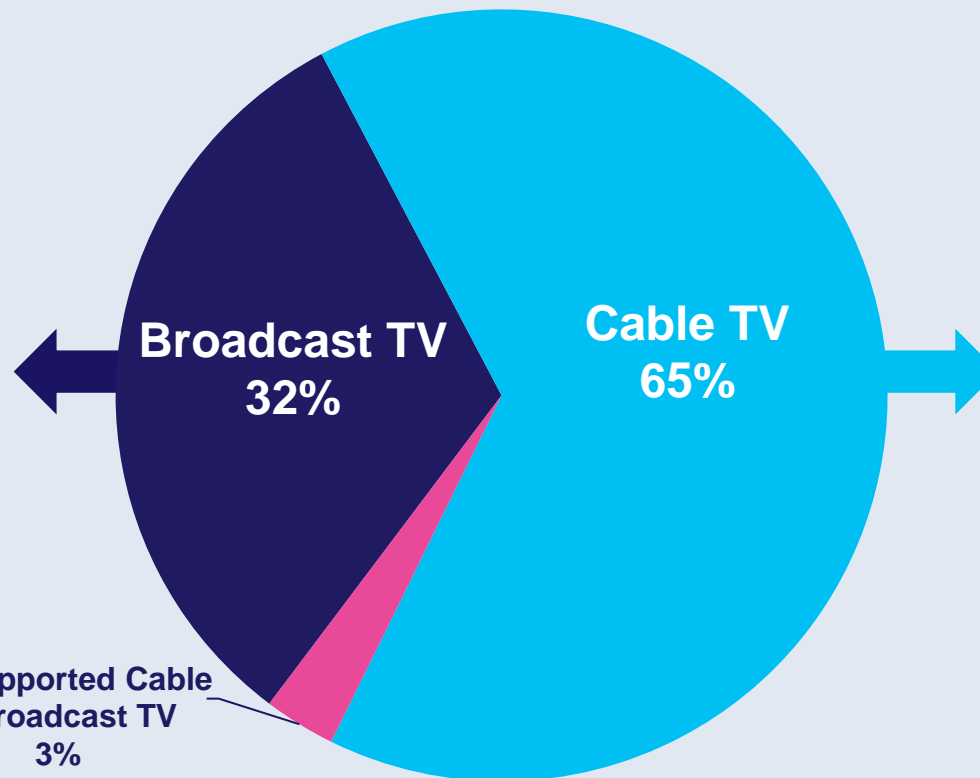
(March 16th – April 26th)



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Cable TV programs accounted for **nearly 70%** of trending ad-supported TV programs during the six-week time period

% Breakout of Ad-Supported TV Programs by Medium
(March 16th – April 26th)



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics.