

A Fresh Take

▶ Staying ahead of evolving dynamics in the marketplace and our culture

Behind Billions of Lost TV Impressions

Full 16-month analysis update (Sep '20 – Dec '21)



What is the issue?

In late December of 2021 Nielsen acknowledged that an error/malfunction had caused them to **undercount TV audiences for the previous SIXTEEN months** (from Sept. 2020 thru Dec. 2021)

DEADLINE December 22, 2021
Nielsen Reveals 16-Month-Old “Error” In Out-Of-Home Measurement Of Sports And Other Live Event Viewing

AdAge December 22, 2021
NIELSEN REVEALS ERROR IN OUT-OF-HOME TV RATINGS

Hollywood REPORTER December 22, 2021
Nielsen Says It Undercounted Out of Home Viewers for More Than a Year

ADWEEK December 22, 2021
Nielsen’s TV Measurement Woes Continue As It Admits OOH Undercounting Since 2020

MediaPost December 22, 2021
Nielsen Understated OOH TV Viewing Since Sept. 2020

Broadcasting+Cable December 22, 2021
In New Error, Nielsen Admits It Left Out Some Out-of-Home Viewing

What was the error and what ad assets were most impacted?

What was the error?

- In September 2020, Nielsen began including out-of-home (outside primary residence) viewing in its national TV ratings
- Nielsen reported on 12/22/21 that due to an internal error, OOH viewing for broadband-only (BBO) homes had never been included in national TV audience estimates (Sept. '20 – Dec. '21)

What ad assets were most impacted?

- Out-of-home viewing is a portion of nearly ALL TV programming
- However, this error had a disproportionate effect on:
 - Live sports, news and high-profile “can’t miss” programs, “tent-pole” events and specials

Why is the industry talking about this?

- The sheer “size” of this error in Nielsen TV currency data is so much more than what Nielsen admitted to in their Dec 22nd notice:

“...out-of-home viewing estimates may be understated... little to no impact to most telecasts..”

When in fact - the scale of this Nielsen error is *unprecedented*...after we conducted our first analysis in January 2022, with only half the re-processed data available to be analyzed, we already knew: **billions of impressions** were not counted & **hundreds of millions** of ad dollars could not be activated by marketers

- This mistake compounds Nielsen’s first admitted 2021 error of undercounting TV audiences during Covid (March 2020 – at least May 2021)

Why does this matter to you?

- Billions of impressions were needlessly taken out of the ‘21/‘22 Upfront, and all 4 quarters of 2021, **reducing the supply of TV ad inventory and distorting the perception of TV’s overall 2021 health**
- With all 16 months of re-processed Nielsen TV audience data completed now, we further reinforce the original projections from our eight-month analysis that **significantly worse** undercounting is being seen across high-profile TV assets, and among many high-priority consumer groups
- With two major, *foundational* errors in 2021, there is **cause for concern about Nielsen’s core competency**, and their ability to implement complicated cross-platform products using that same foundation

Issued on January 26th, VAB's original analysis on the first eight months of available data, began uncovering the depth of the undercounting error

TelevisionNewsDaily January 26, 2022

VAB Estimates Nielsen Undercounting Equals \$700M Ad Spending Loss

tvtech January 26, 2022

UPDATED: VAB Study Finds Nielsen Undercount Cost Networks \$700M

Nielsen erroneously excluded out of home viewing by broadband only homes from Sept. 2020 to Dec. 2021, which hurt ratings for live and high profile events, a new VAB report said

WRAP PRO January 26, 2022
The Essential Source for Entertainment Insiders

Nielsen's Out-of-Home Measurement Error Cost TV Networks \$700 Million, Study Says

Broadcasting+Cable January 26, 2022

Nielsen Out-of-Home Error Was a Big Deal: VAB

30 billion impressions were uncounted leaving \$350 million in unsold ads

VARIETY January 26, 2022

TV Networks Count Tens of Millions of Ad Dollars Lost in Nielsen's Out of Home Error

AdAge January 26, 2022

NIELSEN MISCOUNT COSTS TV NETWORKS AT LEAST \$350 MILLION, TRADE GROUP SAYS

The biggest gaps are among young, Black and Hispanic viewers, VAB says

8-Month Overview Reminder (issued 1/26): 5 Fast Stats You Should Know About the Nielsen TV Out-of-Home Ratings Undercounting

Quantifying Half of the 'Error': 8-Month Overview of Total 16-Month 'Undercounting' Time Period

1

Almost 30 billion ad impressions went uncounted with only half of the months reported thus far

30 billion is 50% of 16-month total

(P2+ Total Day, May-Dec '21)

2

Over \$350 million in TV ads could not be bought or sold between May-Nov '21

\$350MM is 44% of 16-month total

(Dec '21 \$\$\$ not available as of this analysis)

3

Nearly 400K people were not counted in the Primetime ratings every night from May – Dec '21

(on average across broadcast & cable, May-Dec '21)

4

Over 10.5 billion 18-34 ad impressions disappeared

10.5 billion is 50% of 16-month total

(P18-34, Total Day, May-Dec '21)

5

Almost 7.0 billion Black ad impressions and over 5.5 billion Hispanic ad impressions disappeared

(Black & Hispanic P2+, Total Day, May-Dec'21)

How do we grasp and quantify the full impact of this error?



With all 16 months of revised viewing data now available, we analyzed the “lift” in audience based on this data and quantified the dollar impact of lost ad inventory across the 16 months for ratings, impressions and ad dollars (8/31/20 – 12/21/21):

- We pulled **350+** pre-reprocessed and “reprocessed” Nielsen runs in NPower and compiled over **1,150** excel files for analyses
 - “Reprocessed” data is revised numbers to account for the ‘missing’ OOH TV viewership
- Analyzed ad revenue, impressions, average audience and ratings across **six demos**
 - Including dayparts, genres and major programming
 - Ad revenue sourced from Nielsen Ad Intel and calculated based on the monthly audience lifts from NPower across each major genre (Sports, Entertainment, News, General)

Full 16-Month Update: 5 Fast Updated Stats You Should Know About the Nielsen TV Out-of-Home Ratings Undercounting

Quantifying the 'Error': Total 16-Month 'Undercounting' Time Period

1

Almost 54 billion ad impressions went uncounted during the 16-month time period

(P2+ Total Day, Sep'20-Dec '21)

2

Over \$690 million in TV ads could not be bought or sold between Sep '20 – Dec '21

(NPower monthly audience lifts applied to Ad Intel \$\$\$ across sports, entertainment, news, general genres)

3

Nearly 350K people were not counted in the Primetime ratings every night from Sep '20 – Dec '21

(on average across broadcast & cable, Sep'20-Dec'21)

4

Almost 19.5 billion 18-34 ad impressions disappeared

(P18-34, Total Day, Sep'20-Dec '21)

5

12.0 billion Black ad impressions and over 10.5 billion Hispanic ad impressions disappeared

(Black & Hispanic P2+, Total Day, Sep'20-Dec'21)

Almost three and a half billion national TV impressions were not counted on average each month, almost three-quarters of a billion of which were in prime time (on average)

20+ networks accounted for a majority of the 3.4 billion 'lost' impressions, illustrating the wide and deep effect this error had on TV campaigns

Estimated 'Undercounted' P2+ Impressions Based on Reprocessing Lift*

aggregated across ad-supported broadcast & cable TV
Live + Same Day

16-Month Time Period Sep '20 – Dec '21 (8/31/20 – 12/21/21)		
	Monthly Avg % Lift	Total IMPEs (MM) Lift
<u>Total Day</u>	0.66%	53,644.3
Monthly Avg # of TV Networks w/ more than a 1% Lift	23	
Monthly Avg P2+ IMPEs Lift	3.4 Billion	

	Monthly Avg % Lift	Total IMPEs (MM) Lift
<u>Prime Time</u>	0.60%	12,489.5
Monthly Avg # of TV Networks w/ more than a 1% Lift	21	
Monthly Avg P2+ IMPEs Lift	781 Million	

***Reprocessing lift = increase in average audience based on revised viewing estimates for each month**

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+. Time periods reflect: Sep '20 – Dec '21 broadcast months (8/31/20 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample; OOH reprocessing data goes through 12/21/21. IMPEs (MM) Lift - Nielsen Ad Intel, Live+SD, P2+, equalized impressions, % lift was applied to the reported national TV impressions during each time period by daypart to establish an estimate of total monthly impressions undercounted.

'Event' Programs: Estimated 'Undercounted' Impressions Based on Reprocessing Lift

16-Month Time Period: 8/31/20 - 12/21/21 (Live + Same Day)

Over 435 million impressions weren't counted in 20 singular 'tentpole' events and specials, resulting in a \$24 million loss in ad inventory, and the inability to properly evaluate the results of a premium investment for both publishers and marketers

Programming	Network	P2+ IMPEs (000) Lift	P2+ % Lift	P18-34 % Lift	P18-49 % Lift	P25-54 % Lift	Black P2+ % Diff	Hisp P2+ % Lift
Super Bowl LV	CBS	240,193	2.9%	9.1%	5.9%	4.6%	3.5%	5.6%
MLB World Series 2021 (Game 4)	FOX	50,551	2.6%	10.5%	6.6%	5.1%	7.8%	3.5%
NBA Finals 2021 (Game 5)	ABC	31,104	4.0%	8.5%	6.5%	5.9%	3.3%	7.3%
Democracy 2020 - Election Night	FNC	15,202	0.8%	3.1%	1.9%	1.3%	3.0%	2.5%
Summer Olympics - Opening Ceremony	NBC	13,303	1.6%	4.6%	3.5%	2.6%	3.6%	2.0%
New Year's Rockin' Eve (Part 1)	ABC	10,853	2.3%	6.5%	3.6%	2.5%	2.6%	3.5%
NCAA Basketball Championship	CBS	9,974	0.9%	4.0%	2.5%	1.4%	1.6%	1.9%
College Football Championship	ESPN	9,466	0.5%	1.4%	1.0%	0.8%	0.6%	2.3%
The Oscars	ABC	8,571	1.3%	4.9%	3.5%	2.2%	4.1%	0.7%
Grammy Awards	CBS	7,580	1.0%	2.9%	2.1%	1.8%	0.8%	1.9%
Stanley Cup 2021 (Game 3)	NBC	7,367	4.3%	8.0%	6.7%	5.7%	8.2%	12.7%
NBA All Star Game	TNT	7,244	1.9%	4.7%	2.7%	2.0%	1.4%	2.7%
Presidential Inauguration Day	CNN	5,639	0.4%	2.0%	1.1%	0.8%	0.4%	0.7%
Oprah with Meghan & Harry	CBS	4,860	0.6%	3.3%	1.8%	1.6%	1.4%	1.0%
The Masters (Sunday)	CBS	3,511	1.0%	5.1%	3.2%	2.1%	2.0%	2.6%
Golden Globe Awards	NBC	3,241	0.6%	3.8%	1.9%	0.8%	1.1%	0.7%
UEFA Champions League Final	CBS	3,019	7.1%	14.7%	10.5%	8.9%	4.3%	25.3%
Adele One Night Only	CBS	2,789	0.6%	2.3%	1.8%	1.2%	1.5%	1.3%
The Bachelor - After the Final Rose	ABC	1,025	0.8%	3.6%	2.4%	1.8%	1.4%	0.0%
The Voice - Season Finale (12/15)	NBC	634	0.4%	1.3%	1.7%	1.2%	1.2%	0.0%
20 'Event' Program Avg % Lift		21,806	1.8%	5.2%	3.5%	2.7%	2.7%	3.9%

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+, P18-34, P18-49, P25-54, Black P2+, Hispanic P2+. *Reprocessing Lift reflects increase in average audience based on the reported difference between the 'National OOH - Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample (AA Proj (000)): OOH reprocessing data goes through 12/21/21. The 20-program avg % lift reflects the average % lift based on the difference in AA % between 'National OOH - Pre-Reprocessing' & 'National' samples for each demo across programs. IMPEs (MM) Lift - Nielsen Ad Intel, Live+SD, equalized impressions, % lift was applied to the reported national TV impressions for each program during the time period to establish an estimate of total monthly impressions undercounted. FNC = Fox News Channel.

Live sports was the most effected genre with the top 10 singular sports events resulting in a loss of over \$20 million in ads that could not be bought or sold between Sep '20 – Dec '21

Programs that were affected include:

- Sports:
 - NFL Football (multi-networks)
 - Summer Olympics on NBCU nets
 - Copa America & UEFA Champions League on TUDN
- News:
 - 60 Minutes on CBS
 - ABC World News Tonight
- Entertainment
 - The Simpsons on Fox
 - Grey's Anatomy on ABC

Major Genres:
Estimated 'Undercounted' Impressions Based on Reprocessing Lift

aggregated across ad-supported broadcast & cable TV
 Live + Same Day

16-Month Time Period: Sep '20 – Dec '21 (8/31/20 – 12/21/21)						
Demo	Sports		News		Entertainment	
	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift
P2+	1.6%	12,294.9	0.6%	9,170.9	0.5%	20,739.8
P18-34	5.2%	5,165.3	3.5%	1,992.3	2.2%	8,407.4
P18-49	3.4%	8,600.6	2.0%	4,389.1	1.3%	14,683.2
P25-54	2.6%	7,474.3	1.4%	4,577.1	0.9%	12,993.1

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+, P18-34, P18-49, P25-54. Genres: sports = sports events; news = news & news documentary; entertainment = audience participation, award ceremonies, comedy variety, concert music, conversations, colloquies, daytime drama, evening animation, feature film, general drama, general variety, instruction/advice, musical drama, participation variety, popular music, quiz give away, quiz panel, situation comedy, suspense/mystery. Time periods reflect: Sep '20 – Dec '21 broadcast months (8/31/20 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample (AA Proj (000)); OOH reprocessing data goes through 12/21/21. IMPEs (MM) Lift - Nielsen Ad Intel, Live+SD, P2+, P18-34, P18-49, P25-54, equalized impressions, % lift was applied to the reported national TV impressions during the time period by genre to establish an estimate of total monthly impressions undercounted. The subgenres in Ad Intel were aligned with the subgenres in NPower to develop estimates for each genre.

With the error occurring in the Broadband-only portion of the sample which skews younger, the **highly coveted, elusive 18-34** audience experienced the highest undercount of any demo

Examples of programs that were affected include:

- Catfish: The TV Show on MTV
- WWE Friday Night Smackdown on Fox
- NBA Playoffs on ABC & TNT
- Space Ghost Coast to Coast on Adult Swim
- Liga MX on TUDN
- Real Housewives of Atlanta on Bravo

Major Demos:
Estimated 'Undercounted' Impressions Based on Reprocessing Lift

aggregated across ad-supported broadcast & cable TV
 Live + Same Day

16-Month Time Period Sep '20 – Dec '21 (8/31/20 – 12/21/21)		
Total Day	Monthly Avg % Lift	Total IMPEs (MM) Lift
P18-34	2.9%	19,468.0
P18-49	1.8%	35,715.6
P25-54	1.3%	31,408.6

Prime Time	Monthly Avg % Lift	Total IMPEs (MM) Lift
P18-34	2.6%	4,587.2
P18-49	1.5%	8,010.0
P25-54	1.1%	7,242.2

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P18-34, P18-49, P25-54. Time periods reflect: Sep '20 – Dec '21 broadcast months (8/31/20 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Republishing (9/20-12/21)' and revised 'National' Sample (AA Proj (000)); OOH reprocessing data goes through 12/21/21. IMPEs (MM) Lift - Nielsen Ad Intel, Live+SD, P18-34, P18-49, P25-54, equivalized impressions, % lift was applied to the reported national TV impressions during each time period by daypart and demographic to establish an estimate of total monthly impressions undercounted. Note: P18-34, P18-49, P25-54 total day impressions for the month of Dec '21 are higher than P2+ total day imps, from a total audience perspective these impressions are partially offset by a slight decline in P50+ total day impressions based on the reprocessed data.

Black and Hispanic audiences were also more likely to be undercounted, further exacerbating long-standing challenges with properly counting these segments

Programs that were affected include:

- BET Hip Hop Awards
- Real Husbands of Hollywood on BET
- Tyler Perry's Sistas on BET / BET Her
- Copa America on TUDN
- UEFA Champions League on TUDN
- Malverde: El Santo Patron on Telemundo
- La rosa de Guadalupe on Univision
- Hoy on Univision
- La Casa de los Famosos on Telemundo

Ethnicities:

Estimated 'Undercounted' Impressions Based on Reprocessing Lift

aggregated across ad-supported broadcast & cable TV

	16-Month Time Period Sep '20 – Dec '21 (8/31/20 – 12/21/21)	
Total Day	Monthly Avg % Lift	Total IMPEs (MM) Lift
Total P2+	0.7%	53,644.3
Black P2+	0.8%	11,991.7
Hispanic P2+	1.2%	10,597.0

Prime Time	Monthly Avg % Lift	Total IMPEs (MM) Lift
Total P2+	0.6%	12,489.5
Black P2+	0.8%	2,300.3
Hispanic P2+	1.1%	2,795.9

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+, total composite, Black, Hispanic. Time periods reflect: Sep '20 – Dec '21 broadcast months (8/31/20 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample (AA %); OOH reprocessing data goes through 12/21/21. IMPEs (MM) Lift - Nielsen Ad Intel, Live+SD (P2+) & Live+7 (L+SD is not available for the Black and Hispanic demos), P2+, equalized impressions, % lift was applied to the reported national TV impressions during each time period by ethnicity to establish an estimate of total monthly impressions undercounted.

Estimated impressions and ad dollar loss from Nielsen's two recent admitted undercounting errors is **staggering**:

May '21

5/10: COVID-related undercounting due to panel maintenance issues

Dec '21

12/22: Nielsen confirms exclusion of OOH TV viewing from BBO homes

Time period of error: March 2020 – May 2021

Error range (P18-49): 1 - 5%

Impressions lost (P18-49): 17-86 Billion


\$ Value of lost ads: \$468 MM - \$2.3 Billion

Time period of error: September 2020 – December 2021

Error range (P18-49): 1.4 - 3.2%

Impressions lost (P18-49): 35.7 Billion

\$ Value of lost ads: \$690 Million



**The OOH undercounting error only
grew between broadcast seasons
as Covid restrictions loosened**

(Sep '20 – Dec '20 vs. Sep '21 – Dec '21 comparison)

The effects of the measurement error were more severe in the last four months of the 16-month period – total day & prime time undercounted impressions were 26% and 41% higher than the same time the previous year, respectively

Estimated 'Undercounted' P2+ Impressions Based on Reprocessing Lift*

aggregated across ad-supported broadcast & cable TV (live + same day)

	2020: Sep – Dec (8/31/20 – 12/27/20)		2021: Sep – Dec (8/30/21 – 12/21/21)	
	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift
<u>Total Day</u>	0.58%	12,659.7	0.80%	15,938.8
Monthly Avg # of TV Networks w/ more than a 1% Lift	12		34	
Monthly Avg P2+ IMPEs Lift	3.2 Billion		4.0 Billion	
	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift
<u>Prime Time</u>	0.49%	2,714.3	0.75%	3,816.5
Monthly Avg # of TV Networks w/ more than a 1% Lift	12		30	
Monthly Avg P2+ IMPEs Lift	679 Million		954 Million	

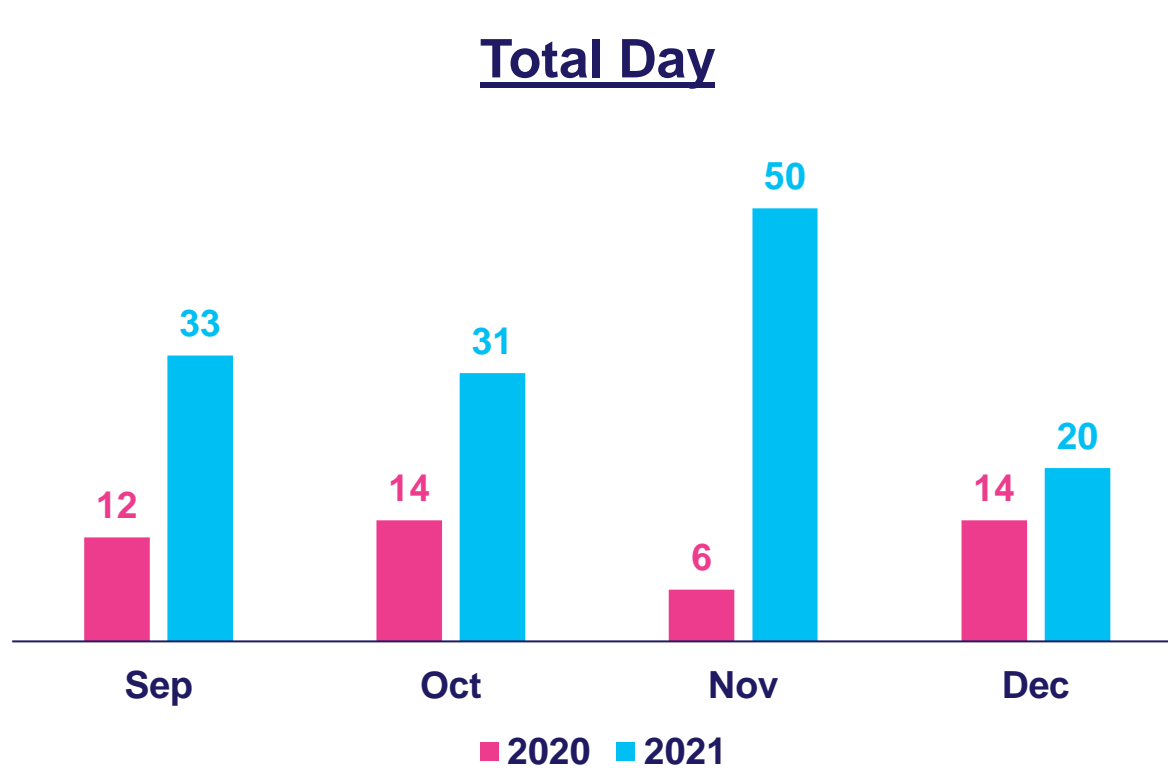
Source: % Lift- Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+. Time periods reflect: Sep '20 – Dec '20 broadcast months (8/31/20 – 12/27/20) and Sep '21 – Dec '21 broadcast months (8/30/21 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample; OOH reprocessing data goes through 12/21/21. **IMPEs (MM) Lift** - Nielsen Ad Intel, Live+SD, P2+, equivalized impressions, % lift was applied to the reported national TV impressions during each time period by daypart to establish an estimate of total monthly impressions undercounted.

Many more networks experienced significant audience undercounting between Sep-Dec '21 compared to the year prior as Covid restrictions loosened and more people gathered outside of their homes for viewing experiences

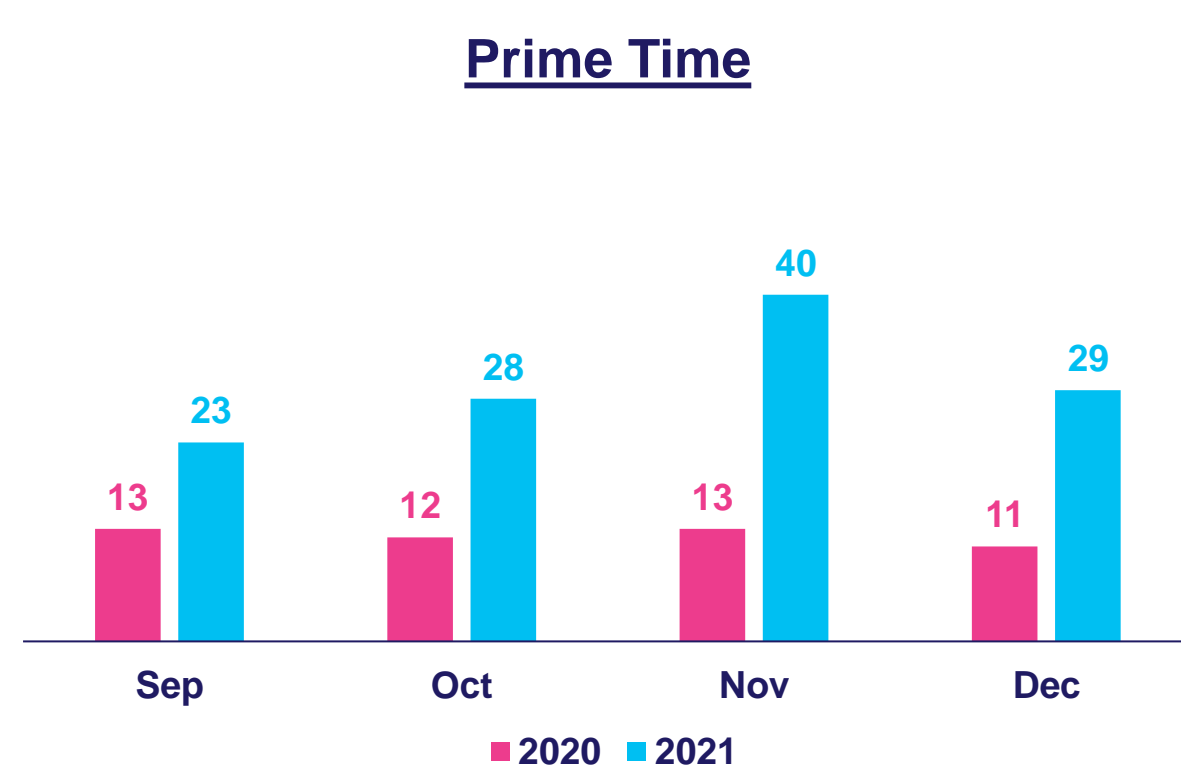
of TV Networks with more than a 1% Reprocessing Lift

ad-supported broadcast & cable TV (live + same day)

Total Day



Prime Time



Source: % Lift- Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+, total day and prime. Time periods reflect: Sep '20 – Dec '20 broadcast months (8/31/20 – 12/27/20) and Sep '21 – Dec '21 broadcast months (8/30/21 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample; OOH reprocessing data goes through 12/21/21.

Increases in audience undercounting were uniform across genres and demos with the largest difference in lifts being seen in news followed closely by entertainment while sports maintained the largest lifts overall

Major Genres: Estimated 'Undercounted' Impressions Based on Reprocessing Lift

aggregated across ad-supported broadcast & cable TV (live + same day)

Demo	Sports				News				Entertainment			
	2020: Sep – Dec (8/31/20 – 12/27/20)		2021: Sep – Dec (8/30/21 – 12/21/21)		2020: Sep – Dec (8/31/20 – 12/27/20)		2021: Sep – Dec (8/30/21 – 12/21/21)		2020: Sep – Dec (8/31/20 – 12/27/20)		2021: Sep – Dec (8/30/21 – 12/21/21)	
	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift
P2+	1.4%	3,232.7	2.1%	5,055.9	0.4%	2,002.0	1.0%	3,108.5	0.4%	4,012.3	0.7%	6,663.6
P18-34	4.5%	1,446.0	6.7%	2,008.1	2.3%	436.2	5.1%	577.0	1.6%	1,722.6	3.1%	2,579.3
P18-49	2.8%	2,317.0	4.4%	3,434.8	1.4%	1,004.1	2.8%	1,276.3	0.9%	2,961.7	1.8%	4,401.3
P25-54	2.1%	1,939.6	3.3%	3,037.9	1.0%	1,041.2	2.1%	1,374.1	0.7%	2,529.0	1.2%	3,894.4

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+, P18-34, P18-49, P25-54. Genres: sports = sports events; news = news & news documentary; entertainment = audience participation, award ceremonies, comedy variety, concert music, conversations, colloquies, daytime drama, evening animation, feature film, general drama, general variety, instruction/advice, musical drama, participation variety, popular music, quiz give away, quiz panel, situation comedy, suspense/mystery. Time periods reflect: Sep '20 – Dec '20 broadcast months (8/31/20 – 12/27/20) and Sep '21 – Dec '21 broadcast months (8/30/21 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample (AA Proj (000)); OOH reprocessing data goes through 12/21/21. IMPEs (MM) Lift - Nielsen Ad Intel, Live+SD, P2+, P18-34, P18-49, P25-54, equalized impressions, % lift was applied to the reported national TV impressions during the time period by genre to establish an estimate of total monthly impressions undercounted. The subgenres in Ad Intel were aligned with the subgenres in NPower to develop estimates for each genre.

The highly coveted, elusive adult 18-34 audience continued to experience the highest undercount of any demo throughout the 16 months, which only grew in the last four months of the analysis

Major Demos: Estimated 'Undercounted' Impressions Based on Reprocessing Lift aggregated across ad-supported broadcast & cable TV (live + same day)

	2020: Sep – Dec (8/31/20 – 12/27/20)		2021: Sep – Dec (8/30/21 – 12/21/21)	
Total Day	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift
P18-34	2.6%	4,863.3	4.0%	6,032.7
P18-49	1.5%	8,472.5	2.4%	10,821.5
P25-54	1.1%	7,435.6	1.7%	9,767.3
Prime Time	Monthly Avg % Lift	Total IMPEs (MM) Lift	Monthly Avg % Lift	Total IMPEs (MM) Lift
P18-34	2.1%	1,095.5	3.3%	1,355.7
P18-49	1.2%	1,758.4	2.0%	2,441.4
P25-54	0.9%	1,569.2	1.4%	2,227.8

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P18-34, P18-49, P25-54. Time periods reflect: Sep '20 – Dec '20 broadcast months (8/31/20 – 12/27/20) and Sep '21 – Dec '21 broadcast months (8/30/21 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample (AA Proj (000)); OOH reprocessing data goes through 12/21/21. IMPEs (MM) Lift - Nielsen Ad Intel, Live+SD, P18-34, P18-49, P25-54, equivalized impressions. % lift was applied to the reported national TV impressions during each time period by daypart and demographic to establish an estimate of total monthly impressions undercounted. Note: P18-34, P18-49, P25-54 total day impressions for the month of Dec '21 are higher than P2+ total day imps, from a total audience perspective these impressions are partially offset by a slight decline in P50+ total day impressions based on the reprocessed data.

Black and Hispanic audiences were more likely to be undercounted to an even higher degree during the last four months of the analysis compared to the first four months

Ethnicities: Estimated 'Undercounted' Impressions Based on Reprocessing Lift aggregated across ad-supported broadcast & cable TV

	2020: Sep – Dec (8/31/20 – 12/27/20)		2021: Sep – Dec (8/30/21 – 12/21/21)	
Total Day	Monthly Avg % Lift	Total IMPES (MM) Lift	Monthly Avg % Lift	Total IMPES (MM) Lift
Total P2+	0.6%	12,659.7	0.8%	15,938.8
Black P2+	0.7%	2,651.1	1.1%	3,625.5
Hispanic P2+	1.1%	2,526.4	1.5%	3,086.5
Prime Time	Monthly Avg % Lift	Total IMPES (MM) Lift	Monthly Avg % Lift	Total IMPES (MM) Lift
Total P2+	0.7%	2,714.3	0.7%	3,816.5
Black P2+	0.6%	482.2	0.9%	666.8
Hispanic P2+	0.9%	598.8	1.4%	857.3

Source: % Lift - Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+, total composite, Black, Hispanic. Time periods reflect: Sep '20 – Dec '20 broadcast months (8/31/20 – 12/27/20) and Sep '21 – Dec '21 broadcast months (8/30/21 – 12/21/21). *Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample (AA %); OOH reprocessing data goes through 12/21/21. **IMPES (MM) Lift** - Nielsen Ad Intel, Live+SD (P2+) & Live+7 (L+SD is not available for the Black and Hispanic demos), P2+, equalized impressions, % lift was applied to the reported national TV impressions during each time period by ethnicity to establish an estimate of total monthly impressions undercounted.

What does this mean for marketers?

- ▶ As ad video technology and consumer behaviors rapidly evolve, more measurement companies are striving to ensure that all viewing is accurately captured and measured, across all devices, locations and occasions
- ▶ Ever-increasing competition in the ad video audience measurement sector is pushing the imperatives of transparency, accuracy and **accountability progressively forward as “must-haves” for the full buy/sell ad marketplace**; more choices *has to* result in **less mistakes**



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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.



We are committed to your business growth and proud to offer VAB members, brand marketers and agencies **complimentary access** to our continuously-growing Insights library. **Get immediate access at theVAB.com.**

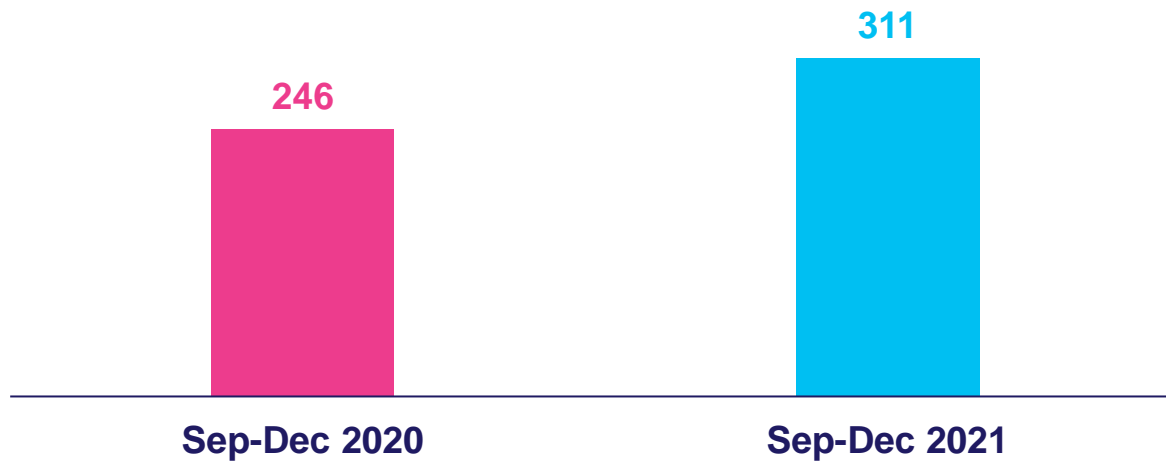
Curious to learn more about VAB? Check out this [quick video](#) to see what we do and how we can help you develop business-driving marketing strategies.

Over 400K were not counted each night in the primetime national TV ratings between Sep-Dec '21, an increase of 42% vs. the same time period a year ago

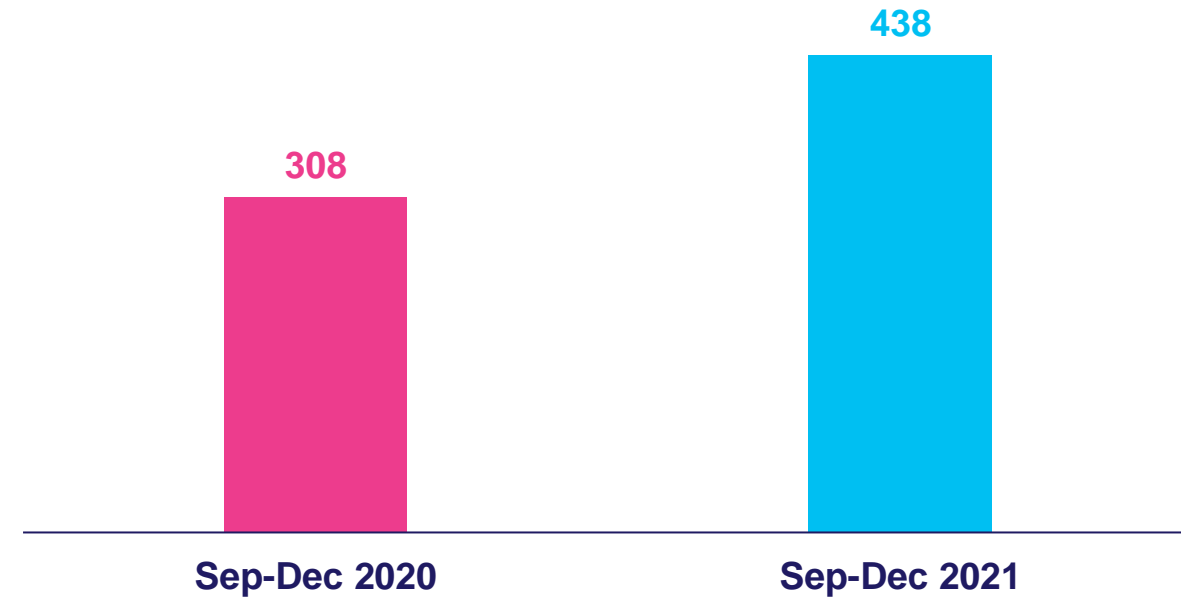
P2+ Average Audience (000) Reprocessing Lift* on Live + Same Day

monthly average, aggregated across ad-supported broadcast & cable TV

Total Day



Prime Time



Source: % Lift- Nielsen NPower, Ratings Analysis Program Report, Live+SD, P2+, total day and prime. Time periods reflect: Sep '20 – Dec'20 broadcast months (8/31/20 – 12/27/20) and Sep '21 – Dec '21 broadcast months (8/30/21 – 12/21/21); monthly average across each time period.
*Reprocessing Lift reflects increase in aggregated average audience across ad-supported broadcast & cable TV based on the reported difference between the 'National OOH – Pre-Reprocessing (9/20-12/21)' and revised 'National' Sample; OOH reprocessing data goes through 12/21/21.