
w/o May 11, 2020 Update

Make Yourself at Home

Video Viewing 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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What You'll Learn...

- ▶ **As consumers establish new routines, the viewership spikes seen in April are flattening out, yet still significantly up vs. pre-pandemic time**
- ▶ **Daytime, Late Night and Overnight, along with news and 'feel good' entertainment programming, offer reach and engagement opportunities**
- ▶ **In looking for fresh content, viewers are expanding their programming repertoire and exploring new platforms, services, devices, and technologies**
- ▶ **Sports fans haven't disappeared, in fact three-quarters of them are watching more, or the same amount of, TV than they were pre-pandemic**

Introduction

While COVID-19 rapidly changed society and fundamentally altered people's behaviors, by late April - six weeks into the pandemic - most people had settled into a 'new normal' routine of balancing their professional, family and personal lives from home.

The formal announcement of COVID-19 as a pandemic by the World Health Organization on March 11th quickly led to sweeping societal changes by state and local governments never before seen – mass 'work from home' mandates, school closures, community-wide lockdowns / 'shelter in place', non-essential business closings, mandatory social distancing and more.

With people still mostly confined to their homes and seeking both a constant source of news and a welcomed escape, we continue to quantify the affect this evolving "new normal" has had on video viewership.

This report covers a **nine-week time period between February 24th – April 27th** – reflecting the three weeks leading up to the 'pandemic' announcement through the sixth week after massive 'stay at home' orders were implemented – and provides an update on *how many* people are watching, *what* people are watching and *when* people are watching.

In addition, we look at where the sports viewer has gone in the absence of live sports and the 'on-demand' growth opportunities in MVPD VOD and video streaming.

Today's "New Normal"



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

% 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

With more time in their day, consumers are **utilizing new platforms and discovering the full functionality** of their existing devices

% of respondents who agree with the statement
P18+



84%

“I have more time to watch/listen/read media”



66%

“I am more open to trying new types of media”
(e.g. new streaming services, podcasts, social media platforms, etc)



54%

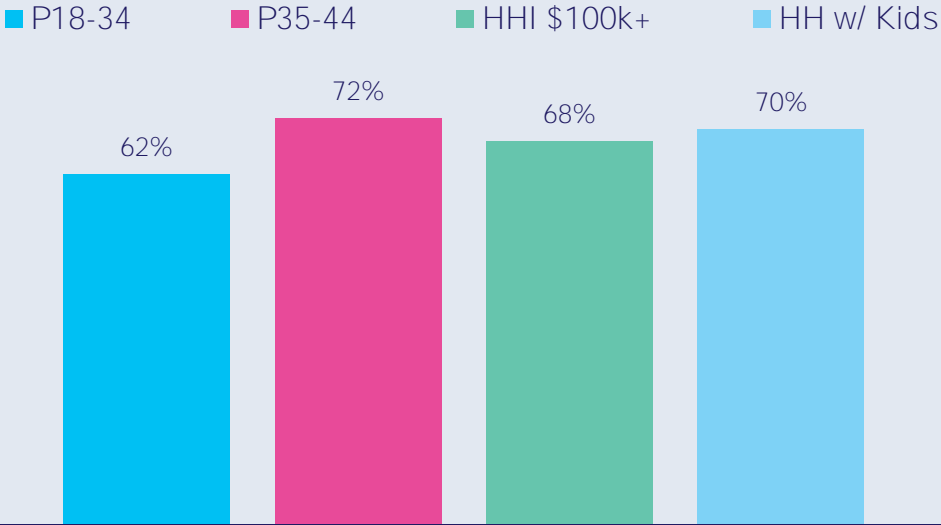
“I have learned how to use more features on my smart TV or a TV related device/platform”

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

Including exploring new features on their smart TVs and connected devices

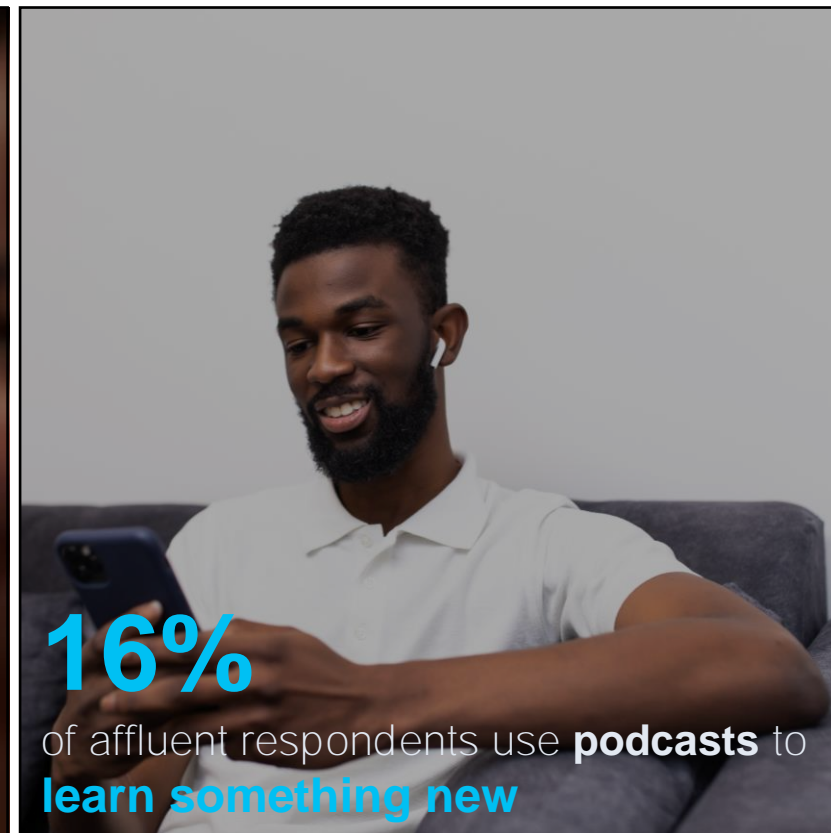
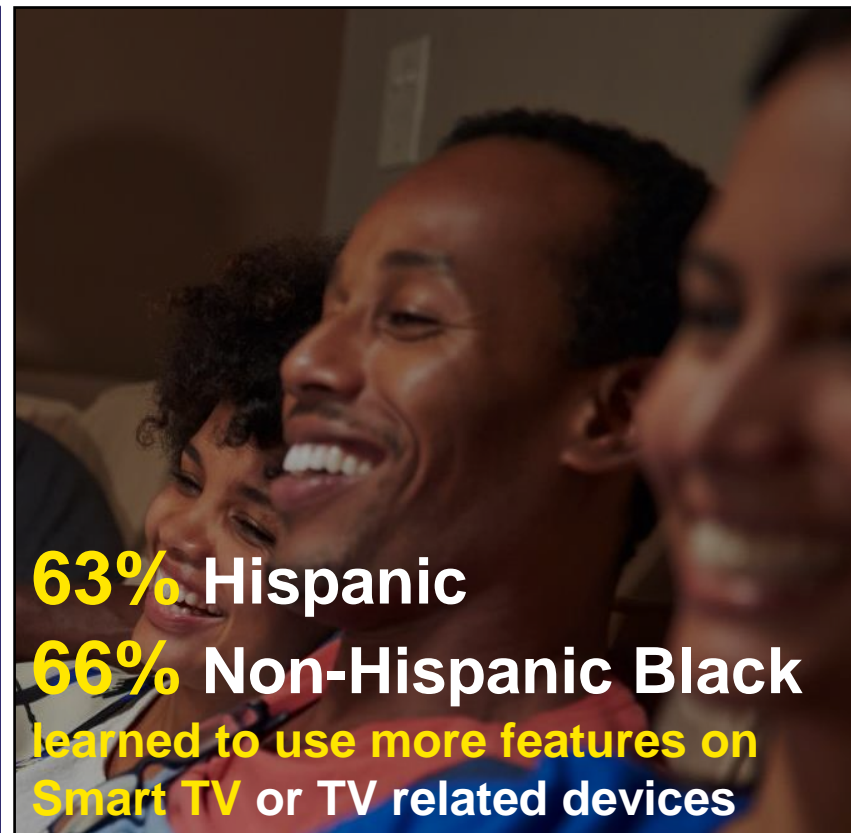
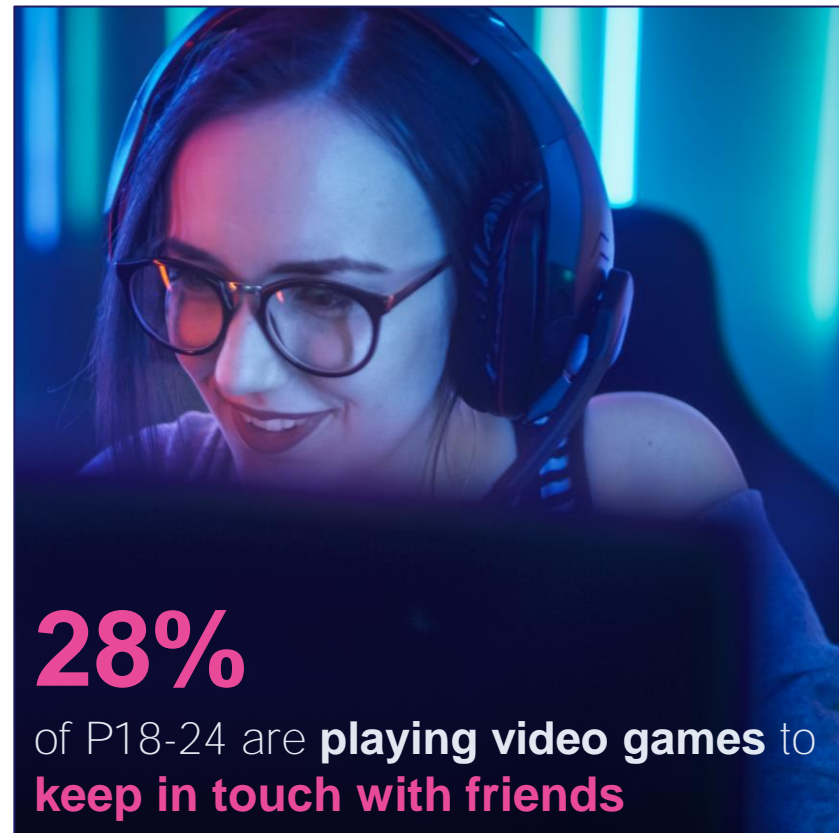
“I have learned how to use more features on my smart TV or a TV related device/platform”

Top 2 Box (Agree Completely or Agree Somewhat)



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 statement, top 2 box (agree completely or agree somewhat).

While Gen Z is using video games to **stay in touch with their friends**, **affluent targets** are turning to **podcasts** to learn something new, and **multicultural** audiences are mastering TV related **technology**



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). Q4: During the COVID-19 pandemic, what are the primary reasons you utilized the media below? Does not equal 100% due to the ability to choose multiple responses.

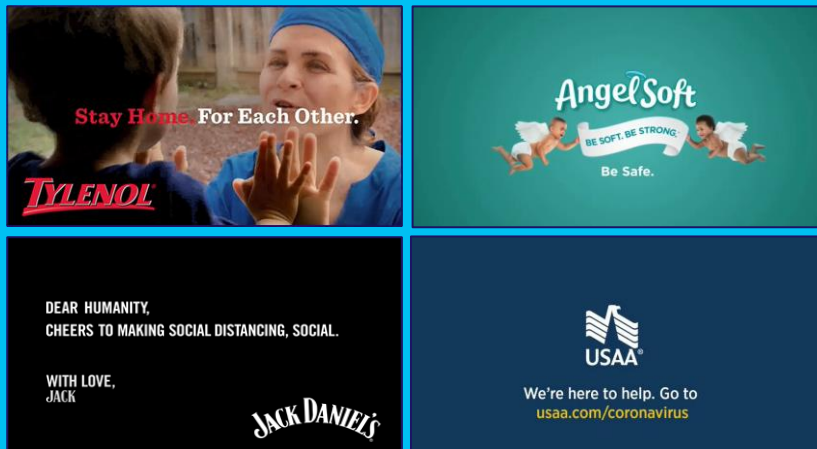
From an advertising perspective, companies that create COVID-19 related messaging can **increase their brand perception** among consumers

“Companies with specific COVID-19 related advertising messages positively impacts my perception of the brand”

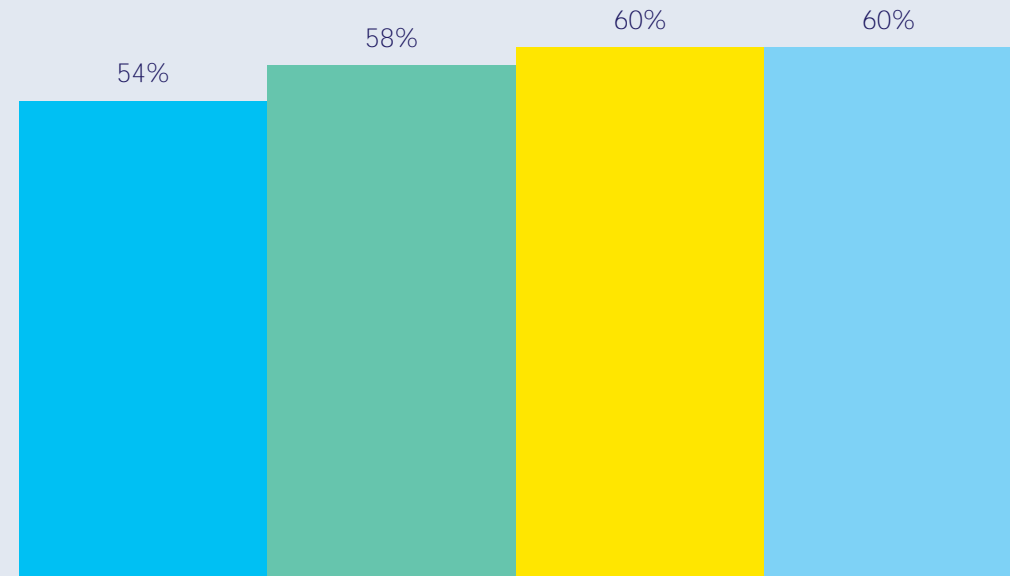
% that agree with the statement

52%

of all respondents



■ P18-34 ■ P35-44 ■ HHI \$100k+ ■ HH w/ Kids



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). Q14: Some companies have created specific COVID-19 related advertising messages (e.g. Guinness, Ford, Burger King, Verizon). How do these types of advertisements typically impact your perception of a brand?

Early movers with COVID-19 messaging have continued to introduce new creative to foster greater connection with, and support of, consumers



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OF THE WHOPPER

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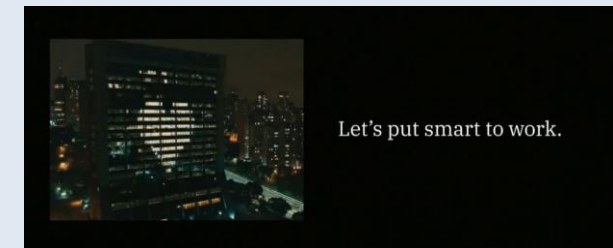
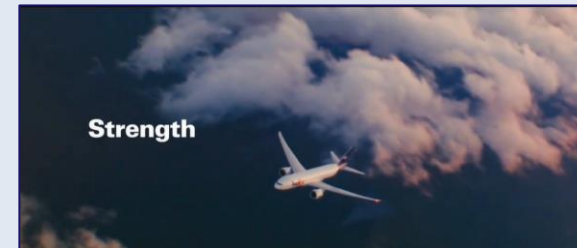
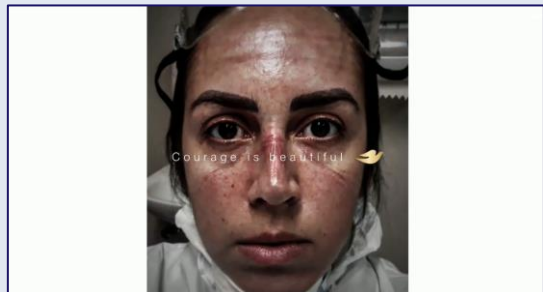


*Reflects new creative launched between 4/4 – 4/30

Brands representing a range of categories, from Beauty to B2B, have added their voices to an influx of advertising promoting **commitment to their community through courage, support and unity**



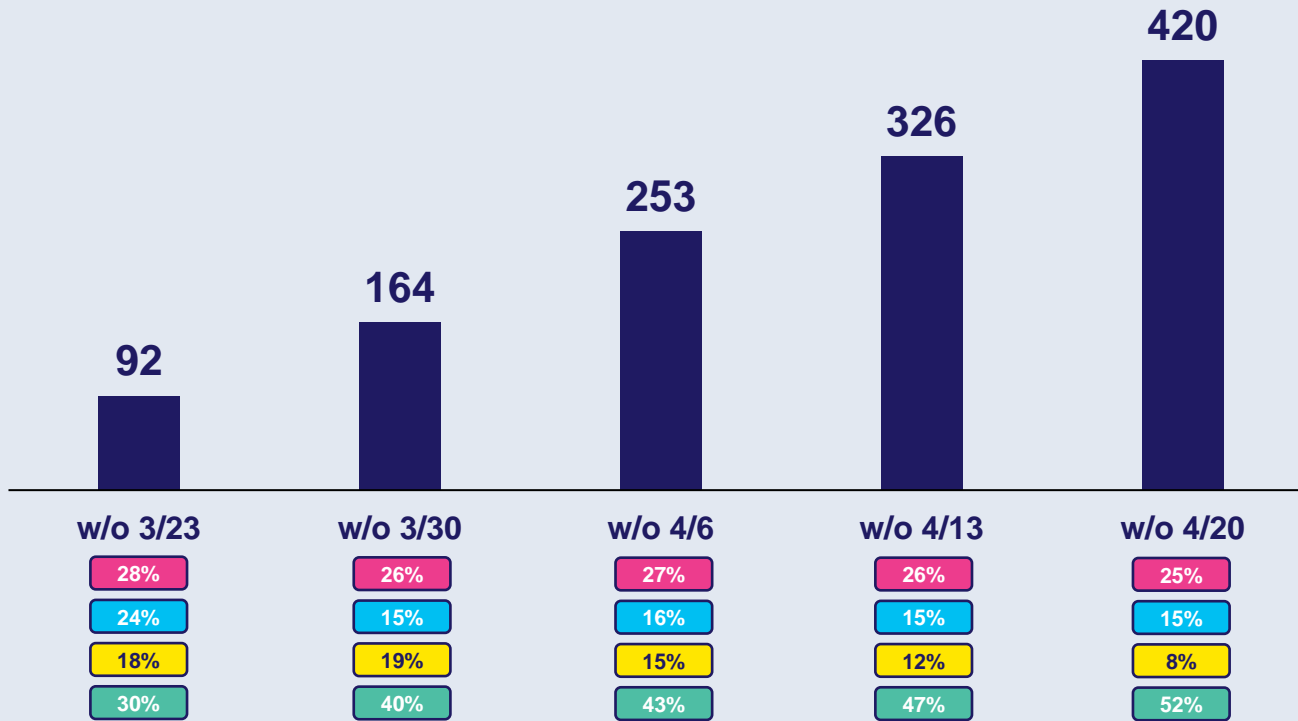
Visa Supports Small Businesses During NFL Draft



*Reflects new creative launched between 3/24 – 4/30

Through April 26th, **420 brands across 15 industries** have aired **COVID-19** related creative delivering over **80 billion** national TV impressions

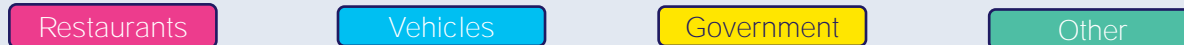
of National TV Advertisers with COVID-19 Related Messaging By Week



Top Brands by Industry

Industry	Brand	Nat'l TV IMPs
Restaurants	Burger King	2.2 B
Vehicles	Lexus	1.3 B
Retail	Lowes	1.3 B
Electronics	Sprint	1.4 B
Government	CDC	2.4 B
Insurance	State Farm	1.7 B
Home	Cottonelle	822 MM
Business	H&R Block	509 MM
Food & Beverage	Kellogg's	329 MM
Life & Entertainment	CNN	707 MM
Health & Beauty	Dove	681 MM
Travel	Hotels.com	219 MM

% Share of Impressions by Industry



Source: VAB analysis of iSpot.tv data released 5/5/20; reported national TV impressions for COVID-19-related creative, 2/26/2020 – 4/26/2020, P18+; 'Other' includes retail stores, electronics & communication, insurance, home & real estate, business & legal, life & entertainment, food & beverage, health & beauty, pharmaceutical & medical, travel, education and apparel, footwear & accessories.

Overall, companies who do demonstrate an **authentic** commitment to helping communities during this crisis will likely **increase purchase intent**

“I am more likely to purchase a product or service from companies that are lending resources or helping local communities during the crisis”

% that agree with the statement

55%

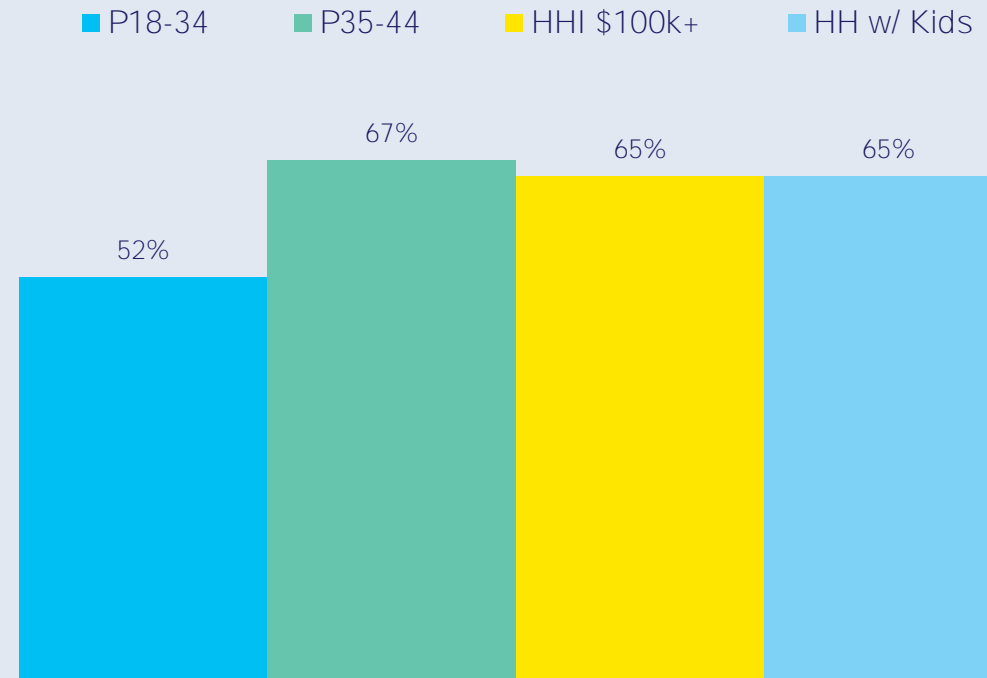
of all respondents

Comcast offers free Xfinity WiFi nationwide amid COVID-19 pandemic

MILLER LITE CREATES A VIRTUAL TIP JAR TO SUPPORT BARTENDERS DURING THE PANDEMIC

30 companies that are donating their proceeds to coronavirus relief charities

Ford, 3M, GE and the UAW to build respirators, ventilators and face shields for coronavirus fight



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). Q15: Some companies are lending resources (e.g. Comcast donating free internet, Ford, 3M and GE Healthcare making healthcare equipment), or helping local communities during the crisis (Miller Lite starts 'virtual tip jar' to support out-of-work bartenders). How does this affect your likelihood to purchase a product or service from this company?

Major Takeaways: **Today's "New Normal"**

- ▶ **The television has become the central focus of people's home**
- ▶ **Looking for ways to deepen their media experience, consumers are actively exploring new media platforms and technology**
- ▶ **People are also discovering new features on their smart TVs and connected devices to enhance the viewing experience**
- ▶ **Companies sharing positive messages and showing a commitment to communities during this crisis are rewarded**

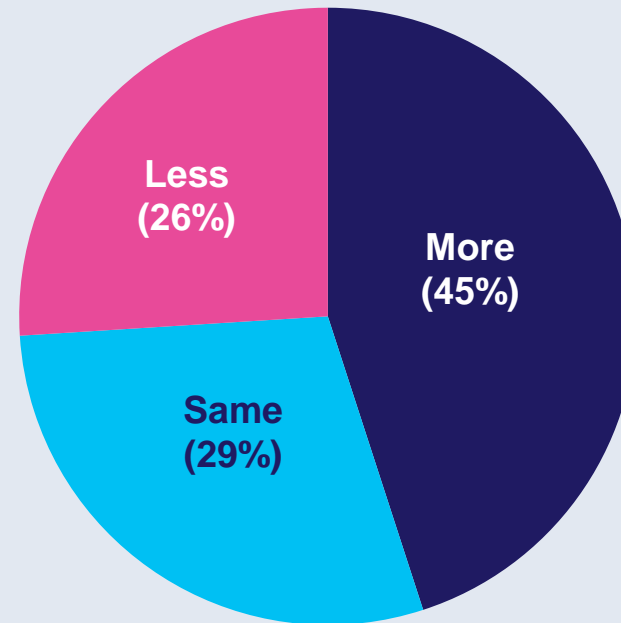
Where Are The Sports Viewers?



The cancellation of live sports is not keeping sports fans from watching TV, nearly **three-fourths** are watching more or the same amount of TV during the COVID-19 Pandemic



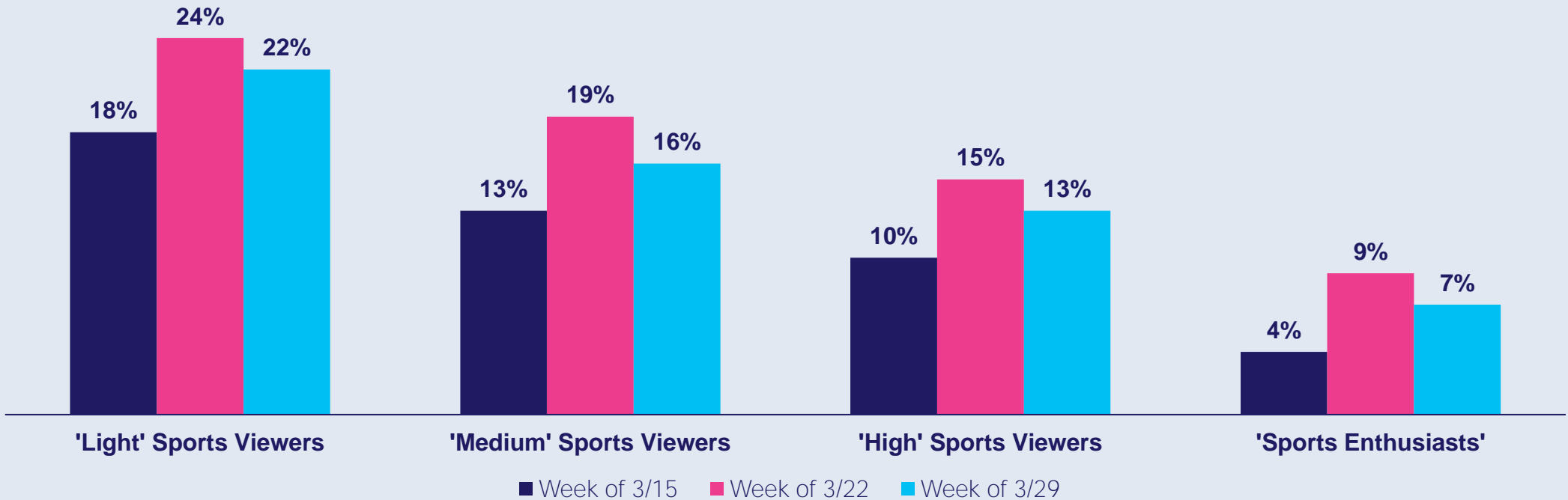
Due to COVID-19 virtually all live sports have been pulled off the air. **As a result, are you watching more, less or the same amount of TV?**



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.

Most sports viewers are watching significantly more TV than they were pre-pandemic, with 'light' viewers spending almost **one-quarter more** time with TV content

% Increase in Total Weekly Viewing Minutes vs. Week of 2/16
(Inclusive of Live/DVR/VOD)

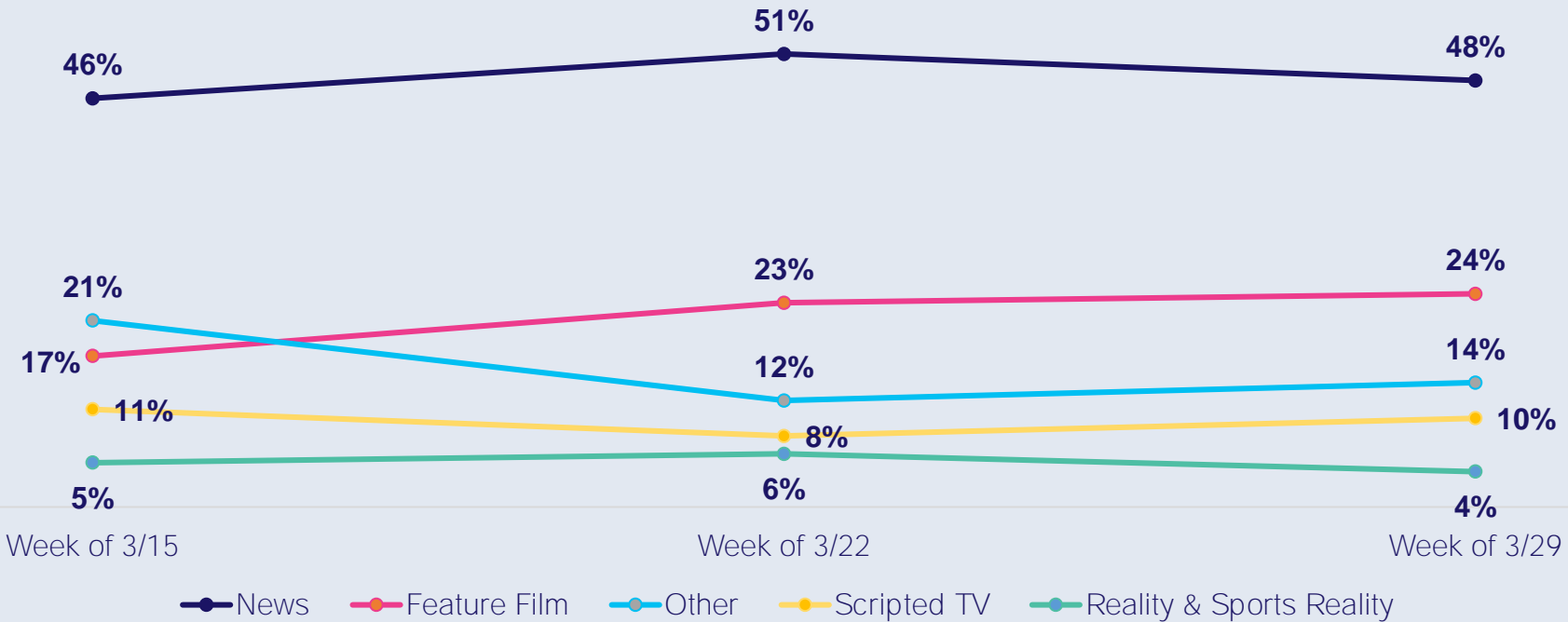


Source: 2020 [Xandr Inc.](#) AT&T Labs analysis of sports viewing households that had 1+ hour weekly sports viewing during week of 2/16/20. Derived from DTV STB data. Inclusive of Live/VOD/DVR. 'Light Sports Viewers' = Previously average 1 weekly hour w/ sports, 'Medium Sports Viewers' = Previously average 3 weekly hours w/ sports, 'High Sports Viewers' = Previously average 8 weekly hours w/ sports, 'Sports Enthusiasts' = Previously average 21 weekly hours w/ sports.

The most diehard fans, who typically dedicate an average of three hours/day to sports programming, have re-allocated **almost half** of that time to **news** and another **one-quarter** of that time to **movies**

Re-Allocation of Sports Viewing Minutes

(% Sports Viewing Minutes Reallocated Among Sports Enthusiasts)



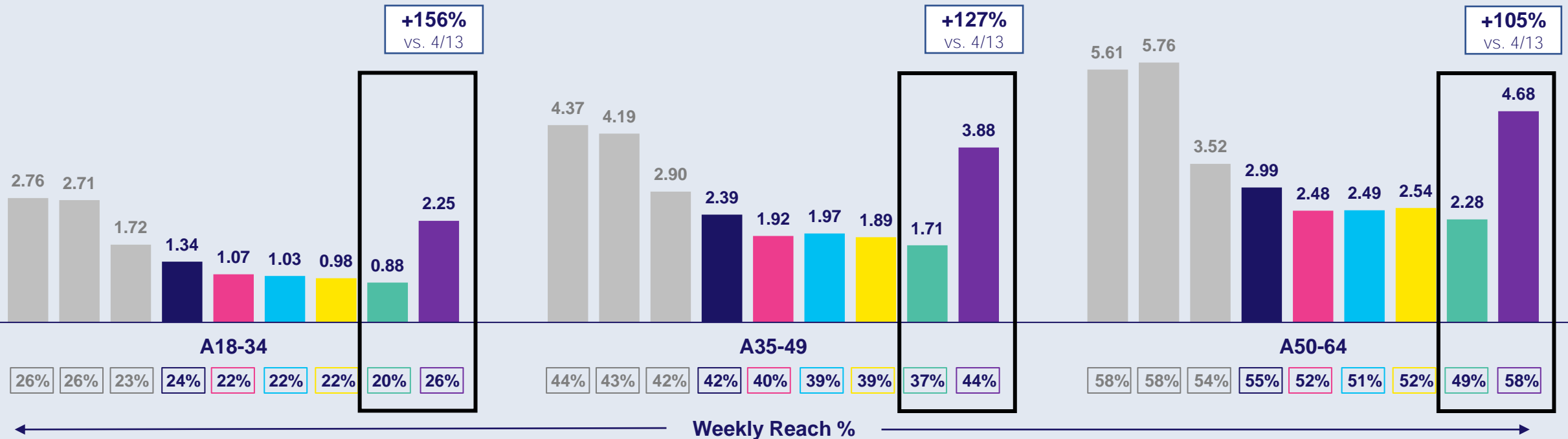
Source: 2020 [Xandr Inc.](#) AT&T Labs analysis of sports viewing households that had 1+ hour weekly sports viewing during week of 2/16/20 or 3/17/19. Derived from DTV STB data. Inclusive of Live/VOD/DVR.

Sports: Fans are thirsty for any kind of sports content which shows in the big viewership spike for the NFL Draft during the week of April 20th

▶ Against P2+, sports viewership was **106% higher** for the week of April 20th vs. April 13th with a 42% weekly reach

Ad-Supported TV: Sports Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Program Report, Live, Total Day, Monday – Sunday, February 24 – April 26, 2020; Demos: P2+, A18-34, A35-49, A50-64, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Sports represents: sports anthology, sports commentary, sports event, sports news. TV Universes (000): A18-34 (70,060), A35-49 (59,410), A50-64 (61,220).



Major Takeaways: **Where Are The Sports Viewer?**

- ▶ **Sports fans haven't disappeared, in fact three-quarters of them are watching more, or the same amount of, TV than they were pre-pandemic**
- ▶ **The diehard sports enthusiasts have re-allocated their sports viewing time mostly to news, to stay up with what's happening in the world, and movies, essentially trading one multi-hour, household-friendly entertainment experience for another**
- ▶ **Fans are hungry for sports-related content and will tune in for any given opportunity such as the NFL Draft which delivered record ratings during the week of April 20th**

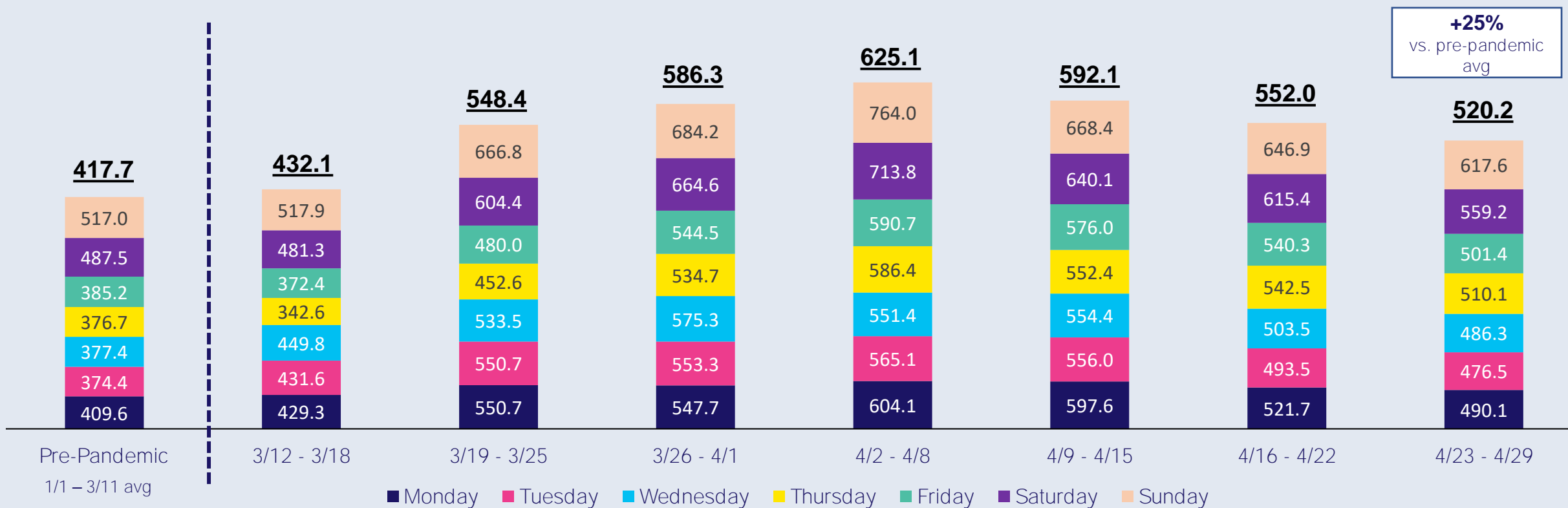
Demanding On-Demand

Satisfying consumers' appetite for more content through MVPD VOD and video streaming



MVPD Video-On-Demand sessions, which skew slightly towards the weekend, were **one-quarter higher** in the seventh week of ‘social distancing’ vs. the pre-pandemic average this year

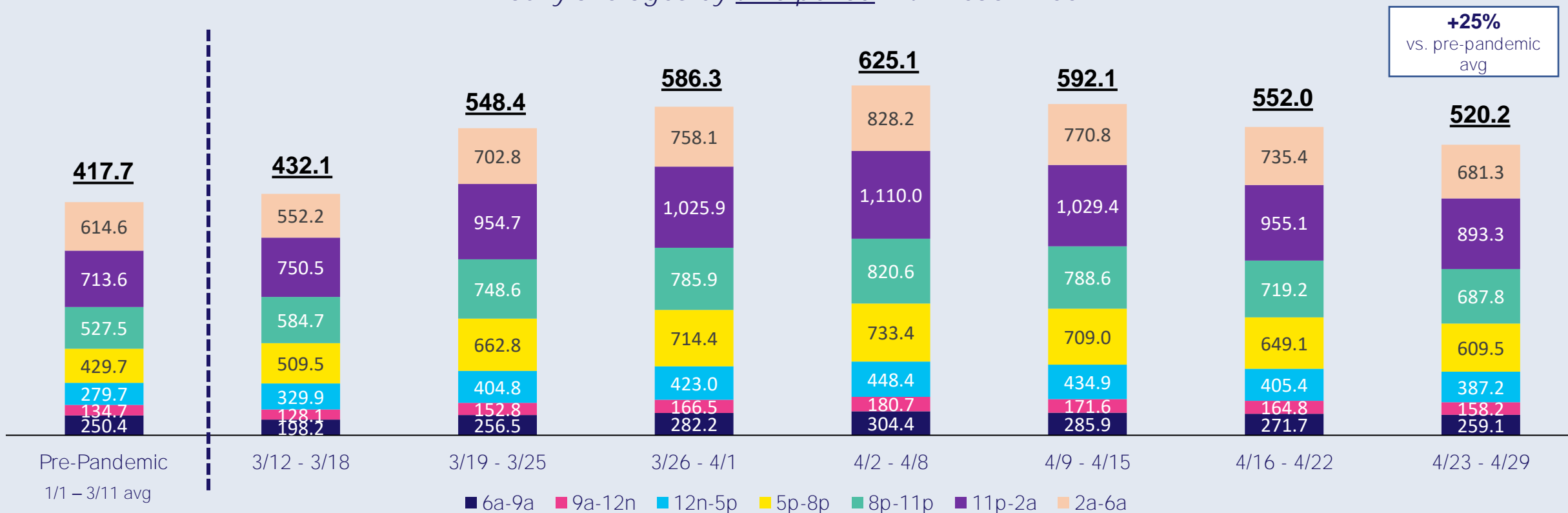
Average Hourly Canoe VOD Sessions By Week
hourly averages by day within each week



Source: [2020 Canoe Ventures, LLC](#), reflects Total Day, 12a-12a.

Viewers are much more likely to access MVPD Video-On-Demand after five o'clock with a skew towards post primetime hours including a fairly significant overnight audience as well

Average Hourly Canoe VOD Sessions By Week
hourly averages by time period within each week



Source: [2020 Canoe Ventures, LLC](#), reflects Total Day, 12a-12a.

The most popular genres to watch on-demand during the pandemic reflect a wide range of programming including **kids, reality, scripted series and movies**

Most Watched Genre on VOD	Rank Week of 4/5	Rank Week of 4/12	% Growth Feb Avg vs. w/o 4/5	% Growth Mar Avg vs. w/o 4/5
Children's TV	1	1	68%	34%
Reality	3	2	49%	27%
Scripted TV Series	2	3	40%	19%
Feature Film	4	4	84%	14%
Sitcom	5	5	65%	34%
Travel & Cooking	6	6	46%	26%
Home & DIY	7	7	54%	41%
Documentary	8	8	13%	7%
Children's Feature Film	9	9	190%	103%
News	10	10	91%	66%

Source: 2020 [Xandr Inc.](#) AT&T Labs analysis VOD derived from DTV Satellite based on 3+ minutes. Comparison are February and March weekly averages to week of 4/5.

Consumers' increased appetite for video content has led them to engage more with both ad-supported and subscription **streaming services** as well

Since the COVID-19 Pandemic, have you done any of the following?

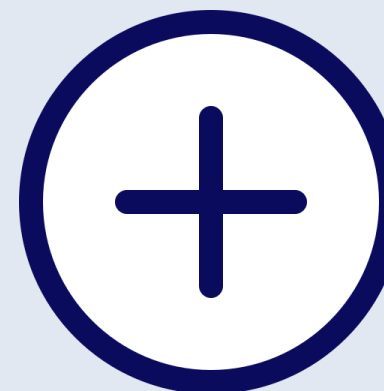
P18+



37%

Watched a free streaming service

(e.g. Roku, Pluto or Tubi)



36%

Added a new streaming service

(i.e., Apple TV+, Disney+, Netflix, etc.)

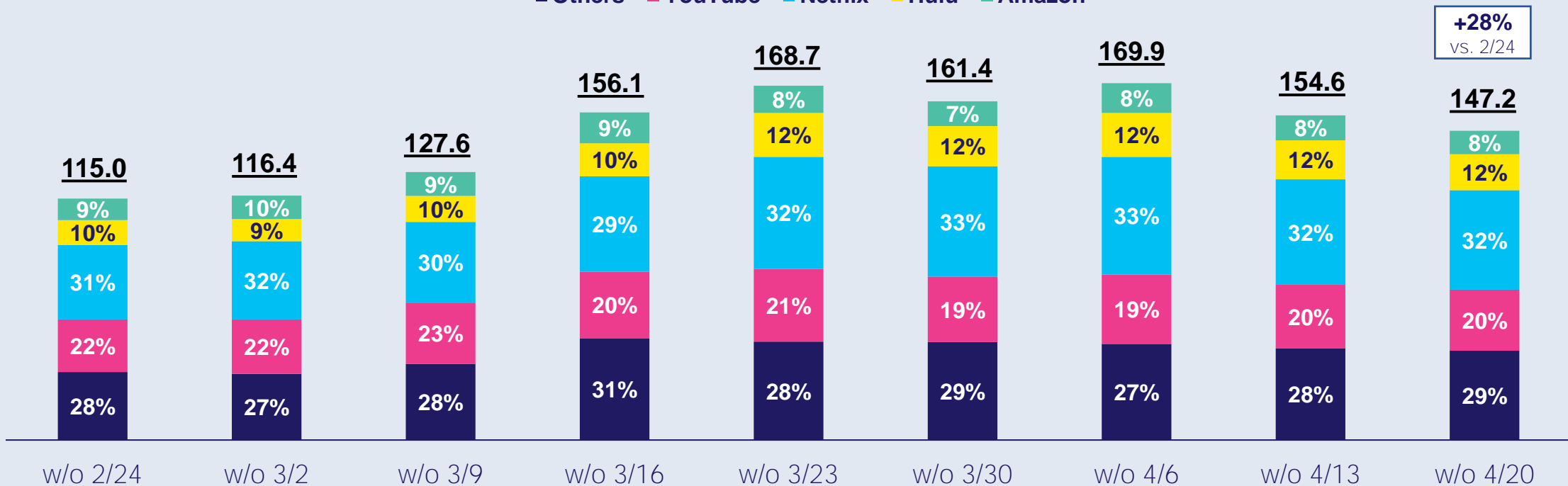
Source: VAB's ['As Time Goes By: How Media Consumption Is Helping America Cope'](#). VAB / Lucid 'Media Usage In The Time of COVID-19 Survey,' April 2020. Survey base: P18+ & household subscribes to cable, telco, internet TV or satellite TV (n=1,004). Q10: Since the COVID-19 Pandemic, have you done any of the following? Note: Percentages don't add to 100% because it excludes "none of the above" response.

Since mass lockdowns took effect in mid-March, video streaming has followed **similar viewership patterns** as **live TV** and **VOD** over the last six weeks, with a spike in late March followed by a leveling off in April

Streaming Minutes Per Week

P2+ Weekly Total Streaming Minutes (billions)

■ Others ■ YouTube ■ Netflix ■ Hulu ■ Amazon



+28%
vs. 2/24

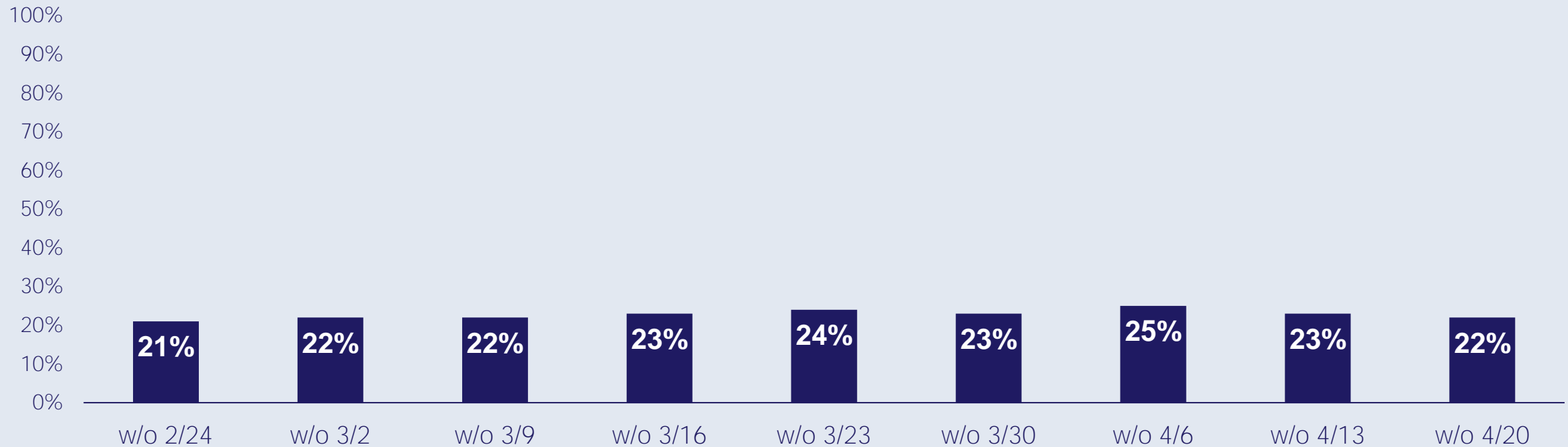
Source: Nielsen, Streaming Meter Homes, sum of daily streaming minutes (weighted), P2+, Total Day, Others calculated as the difference between total streaming and the sum of the major four digital publishers.

The share of streaming among streaming capable homes only has been **relatively consistent** throughout the pandemic, hovering just **below one-quarter** of total TV usage

Streaming Share of Total TV Usage

Among Streaming Capable Homes Only

Weekly, Persons 2+, Streaming as a % of Total TV Usage



Source: Nielsen, Custom Streaming Meter Report cut back to Streaming Capable Homes, sum of daily streaming minutes (weighted) as a percent of Total TV Usage, P2+, Total Day.

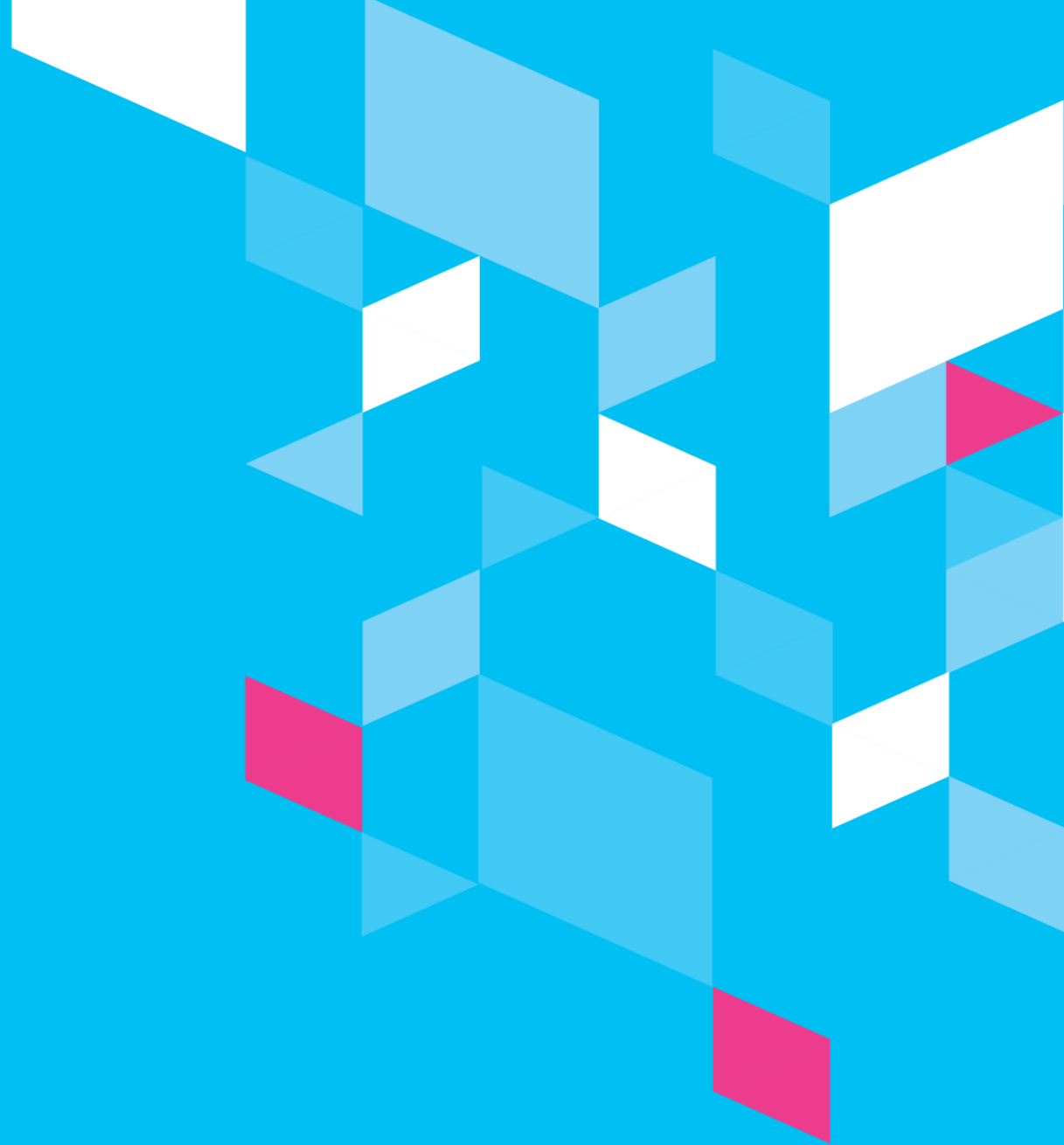


Major Takeaways: **Demanding Video-On-Demand**

- ▶ **Video viewing during the pandemic is not an ‘either / or’ proposition as people are hungry for video content and consumption is up across linear, VOD and streaming**
- ▶ **The increase in streaming has created greater trial and usage opportunities for free, ad-supported services**
 - In fact, during this time, more consumers are looking to try ad-supported TV streaming platforms than subscription services
- ▶ **The ebbs and flows of weekly viewership trends are fairly aligned across Linear TV, VOD and streaming throughout the quarantine**
- ▶ **This alignment is also shown through the relative stability of streaming’s share of total TV usage each week within streaming capable homes**

How Has TV Viewership Changed?

HUTs/PUTs/Reach



Live TV has experienced the **biggest increase in usage** since the COVID-19 pandemic began

% 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



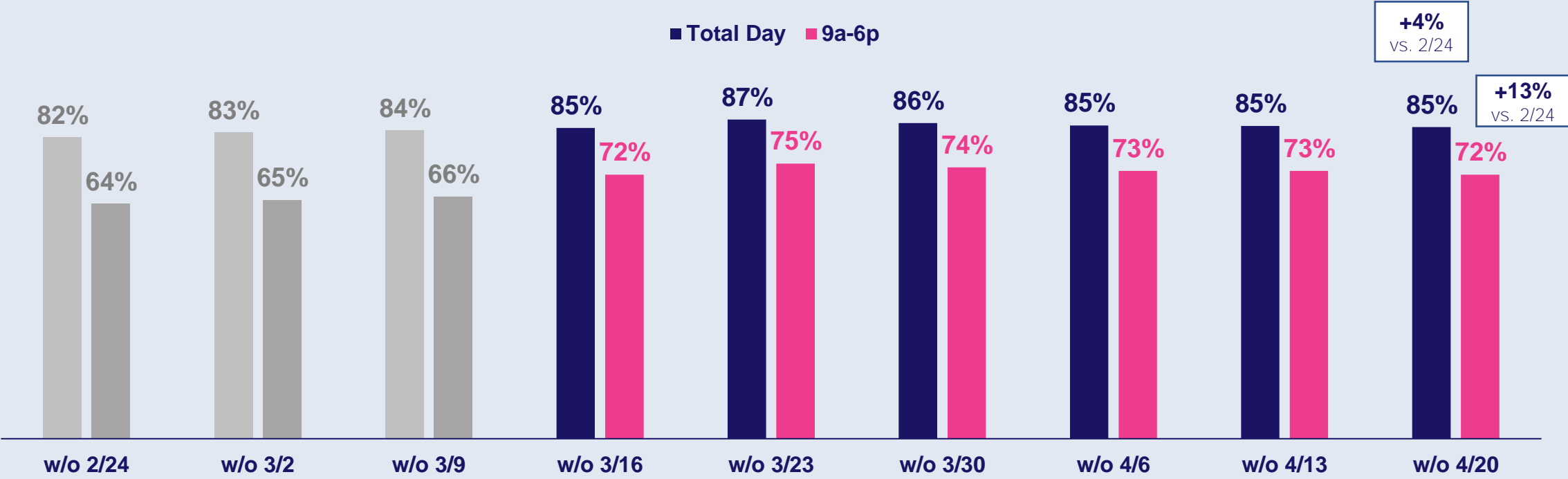
Source: VAB's ['As Time Goes By: How Media Consumption Is Helping America Cope'](#). VAB / Lucid 'Media Usage In The Time of COVID-19 Survey,' April 2020. Survey base: P18+ & household subscribes to cable, telco, internet TV or satellite TV (n=1,004). Q2: When thinking about how you've spent your time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

More households have been turning into television throughout the day since the pandemic began with an average of nearly **103 million homes** tuning in daily during the week of April 20th

Households Using TV (HUT)

Total Day & 9a-6p
Daily Average Per Week
(Monday-Friday)

■ Total Day ■ 9a-6p



+4%
vs. 2/24

+13%
vs. 2/24

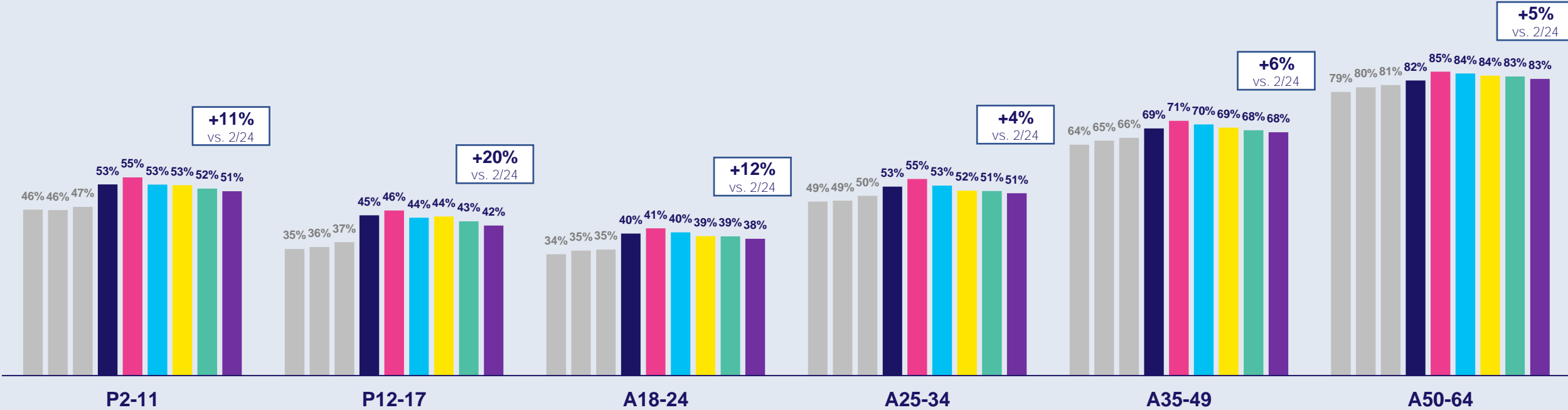
Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, 9a – 6p, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demo: Household, Viewing Source: HUTs (Households Using TV).

Regardless of age, more people are tuning into television during the pandemic, especially younger audiences which have seen **double-digit increases** in usage vs. late February

Persons Using TV (PUT): Total Day

Daily Average Per Week
(Monday-Friday)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



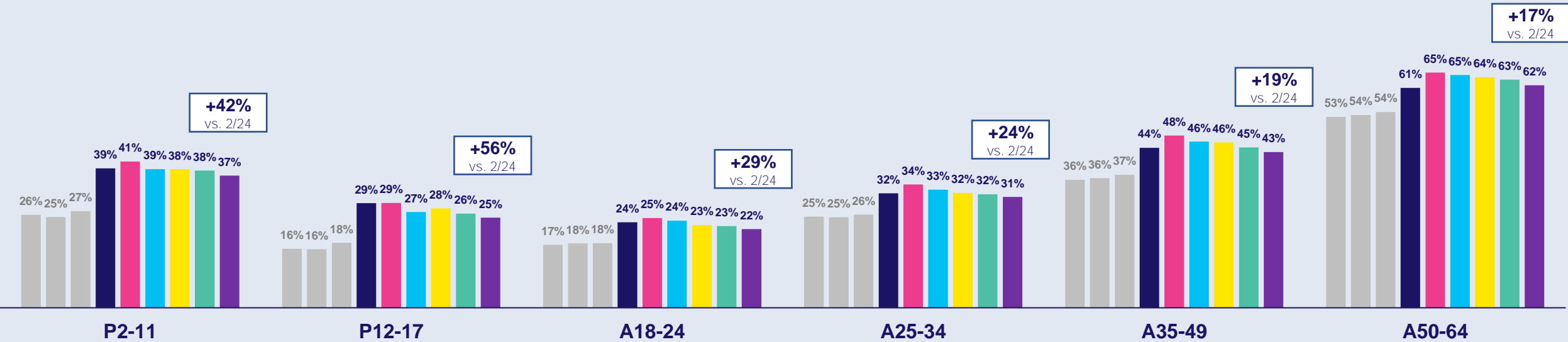
Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2-11, P12-17, A18-24, A25-34, A35-49, A50-64, Viewing Source: PUTs (Persons Using TV).
TV Universes (000): P2-11 (39,610), P12-17 (24,480), A18-24 (28,630), A25-34 (41,430), A35-49 (59,410), A50-64 (61,220).

With mass lockdowns in place for six weeks now, all age groups continue to see significant, double-digit increase **during the day** - especially kids, teenagers and young adults

Persons Using TV (PUT): 9a-6p Time Period

Daily Average Per Week
(Monday-Friday)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Time Period Report, Live, 9a – 6p, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2-11, P12-17, A18-24, A25-34, A35-49, A50-64, Viewing Source: PUTs (Persons Using TV).
TV Universes (000): P2-11 (39,610), P12-17 (24,480), A18-24 (28,630), A25-34 (41,430), A35-49 (59,410), A50-64 (61,220).

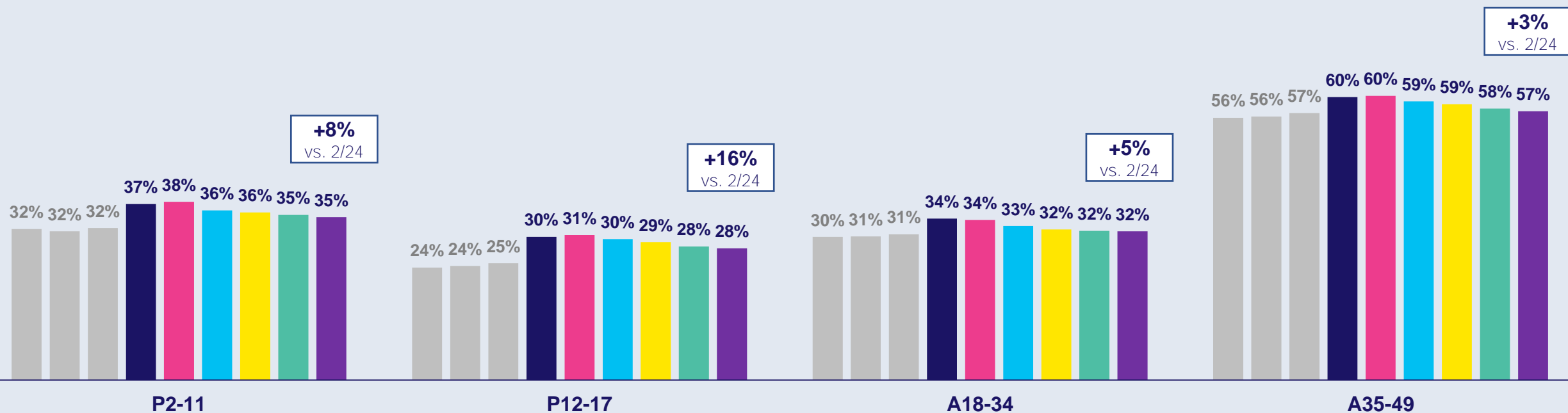
Maintaining increases seen vs. pre-pandemic, ad-supported live TV reach has leveled off over the last few weeks

▶ Against P2+, average daily reach was **4% higher** for the week of April 20th vs. Feb 24th with a 55% average daily reach

Ad-Supported TV Reach: Total Day

Daily Average Per Week
(Monday-Friday)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P2-11, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). TV Universes (000): P2-11 (39,610), P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

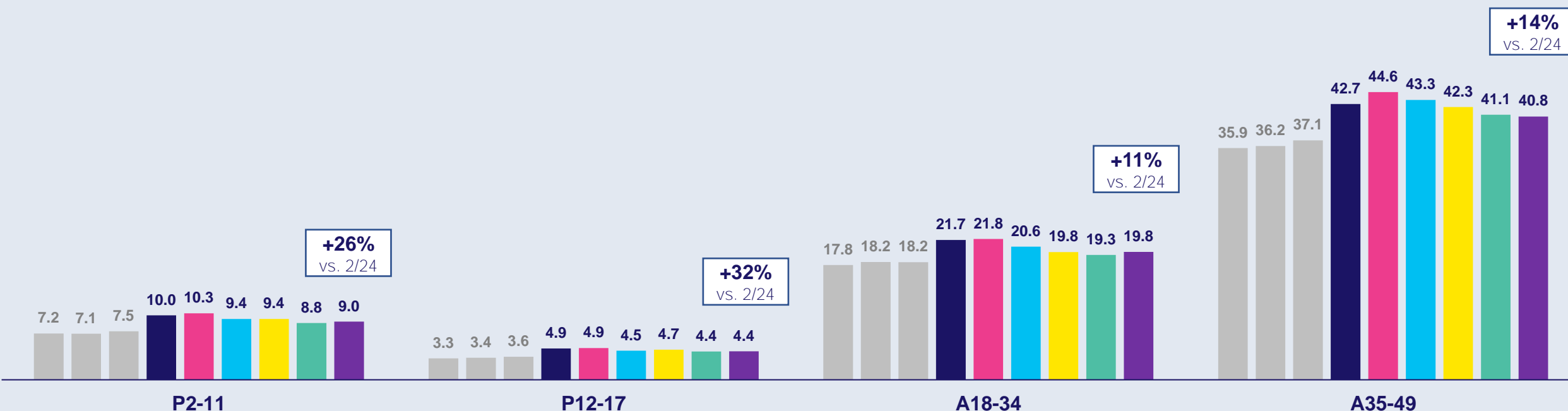
Viewers collectively spent **nearly half a billion more hours** watching TV Monday-Friday during the sixth week of the lockdown vs. late February

▶ Against P2+, total weekday viewership for the week of April 20th was **12% higher** vs. Feb 24th

Ad-Supported TV 'Total Time Spent': Total Day

Total Weekly Minutes Viewed (in billions)
(Monday – Friday)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P2-11, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). TV Universes (000): P2-11 (39,610), P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).



Major Takeaways: **Television Usage**

- ▶ **It's not surprising as people have settled into their new routines that spikes in viewership have started to flatten out**
- ▶ **However, viewership is still up significantly relative to the pre-pandemic period, especially among younger audiences**

When are People Watching?

Dayparts

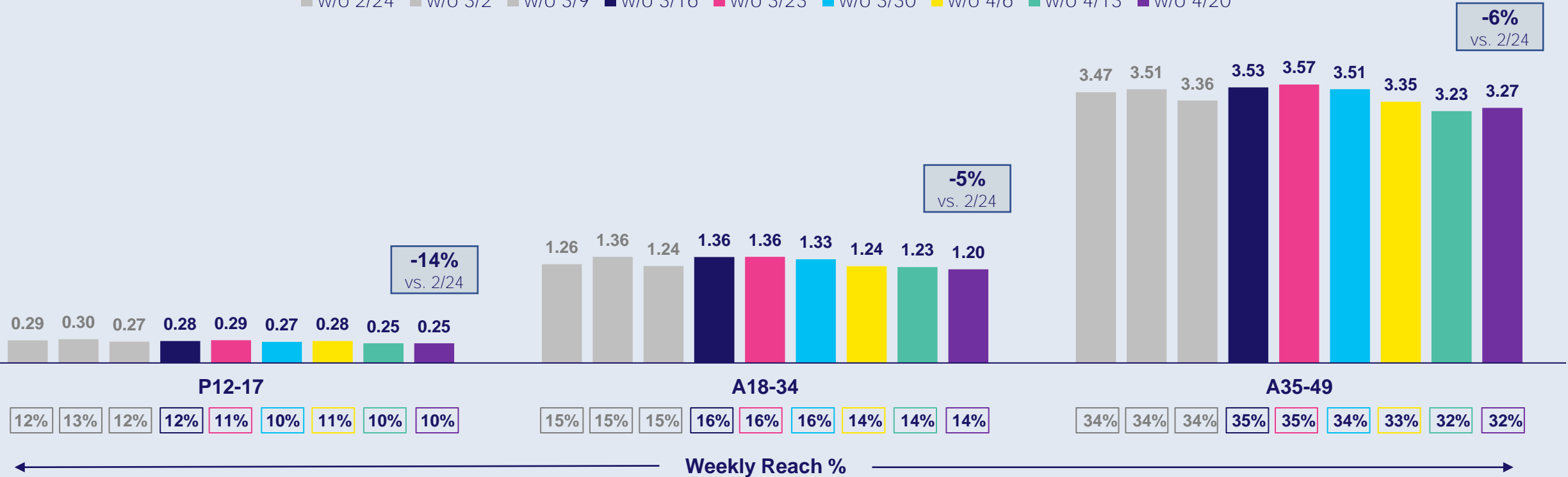


Early Morning: There's been a decline in viewing across most demos as people have settled into a morning routine with a later start to the day

▶ Against P2+, early morning viewership **decreased 2%** for the week of April 20th vs. Feb 24th with a 32% weekly reach

Ad-Supported TV: Early Morning (M-F 6a-9a) Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



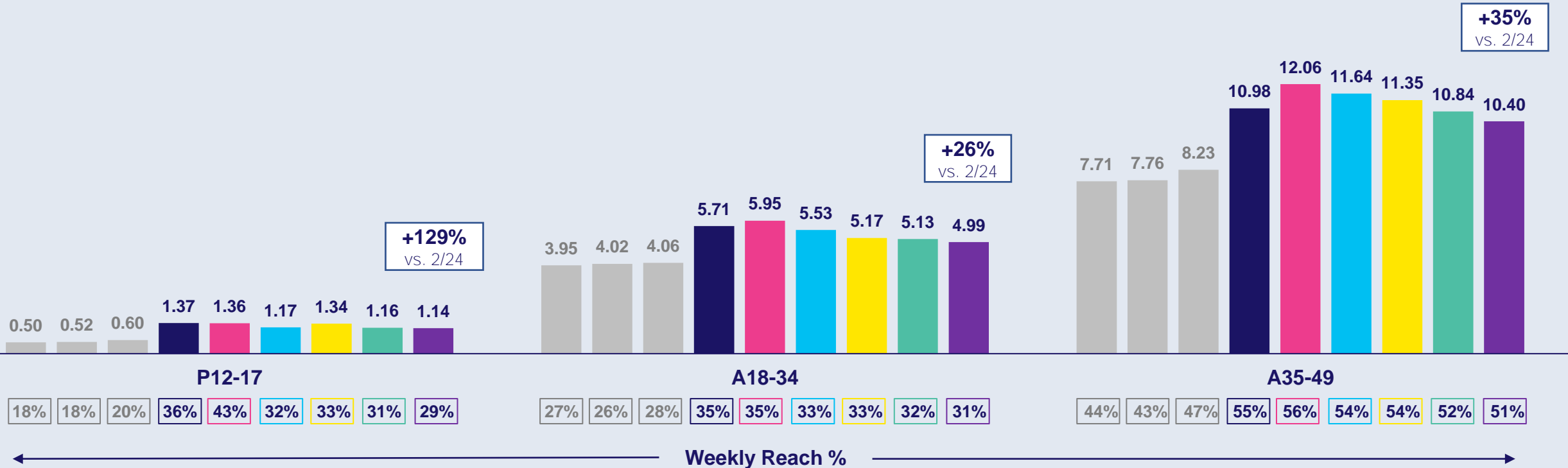
Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Early Morning represents Monday through Friday from 6a-9a. TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

Daytime: Even with a recent leveling off, this daypart is seeing significant double-digit increases while families are mostly confined to their homes

▶ Against P2+, daytime viewership was **27% higher** for the week of April 20th vs. Feb 24th with a 52% weekly reach

Ad-Supported TV: Daytime (M-F 9a-4p) Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



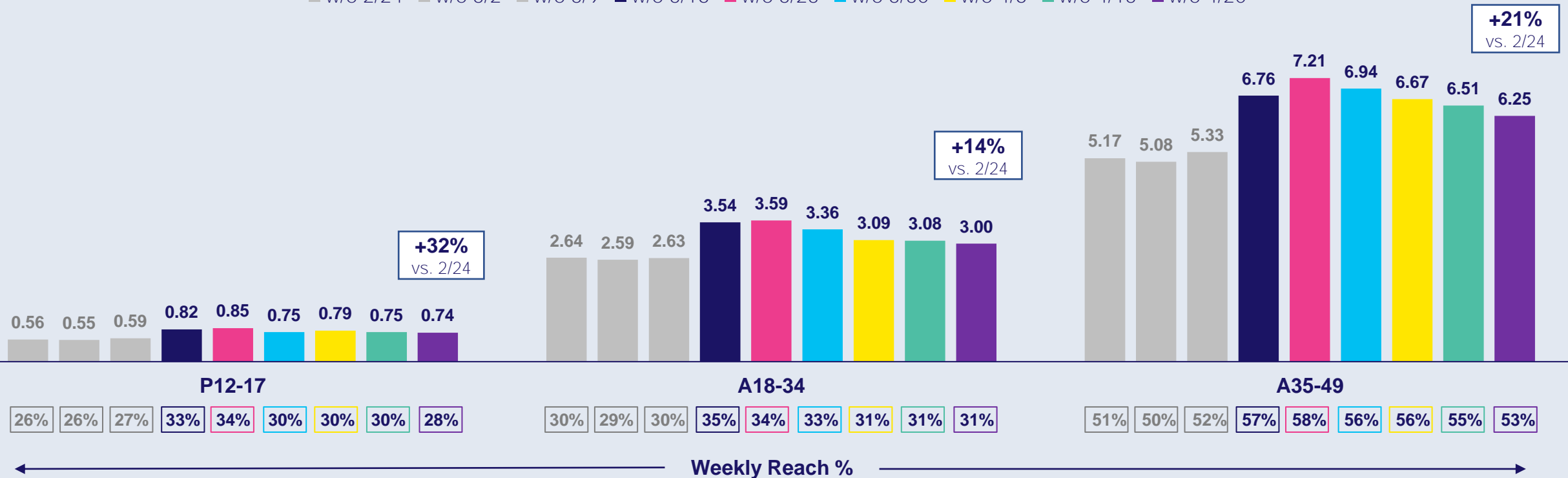
Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Daytime represents Monday through Friday from 9a-4p. TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

Early Fringe: Similar to daytime, this daypart is also seeing double-digit viewership increases vs. pre-pandemic even with recent declines

▶ Against P2+, early fringe viewership was **15% higher** for the week of April 20th vs. Feb 24th with a 54% weekly reach

Ad-Supported TV: Early Fringe (M-F 4p-7p) Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



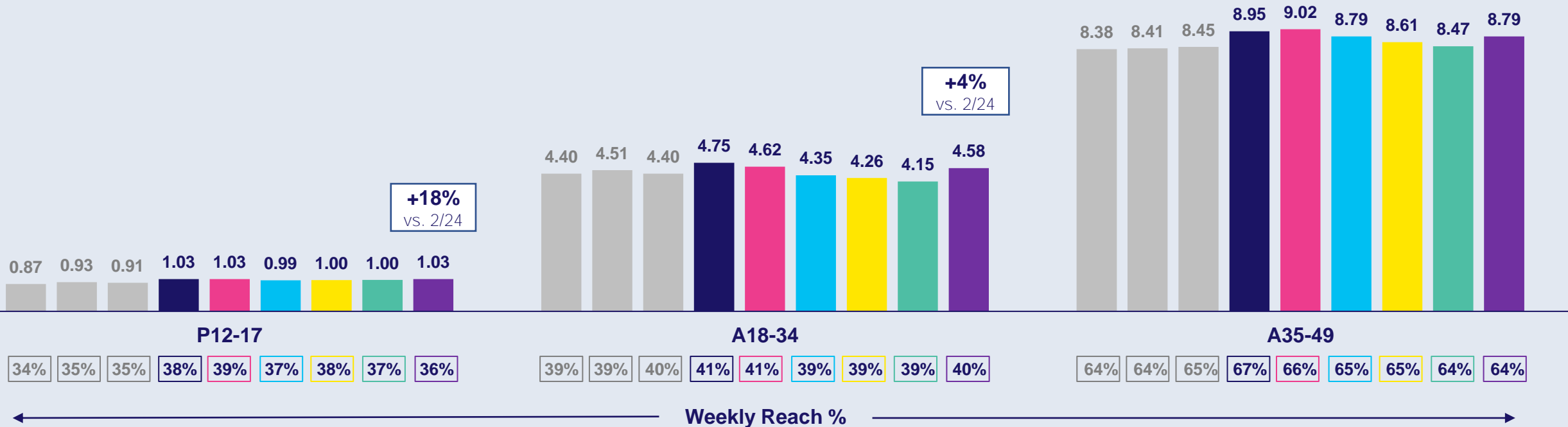
Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Early Fringe represents Monday through Friday from 4p-7p. TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

Prime: Although still impacted by the cancellation of sports, prime saw a slight increase against adult demos during the week of April 20th

▶ Against P2+, primetime viewership was **5% higher** for the week of April 20th vs. Feb 24th with a 61% weekly reach

Ad-Supported TV: Prime (M-F 8p-11p) Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



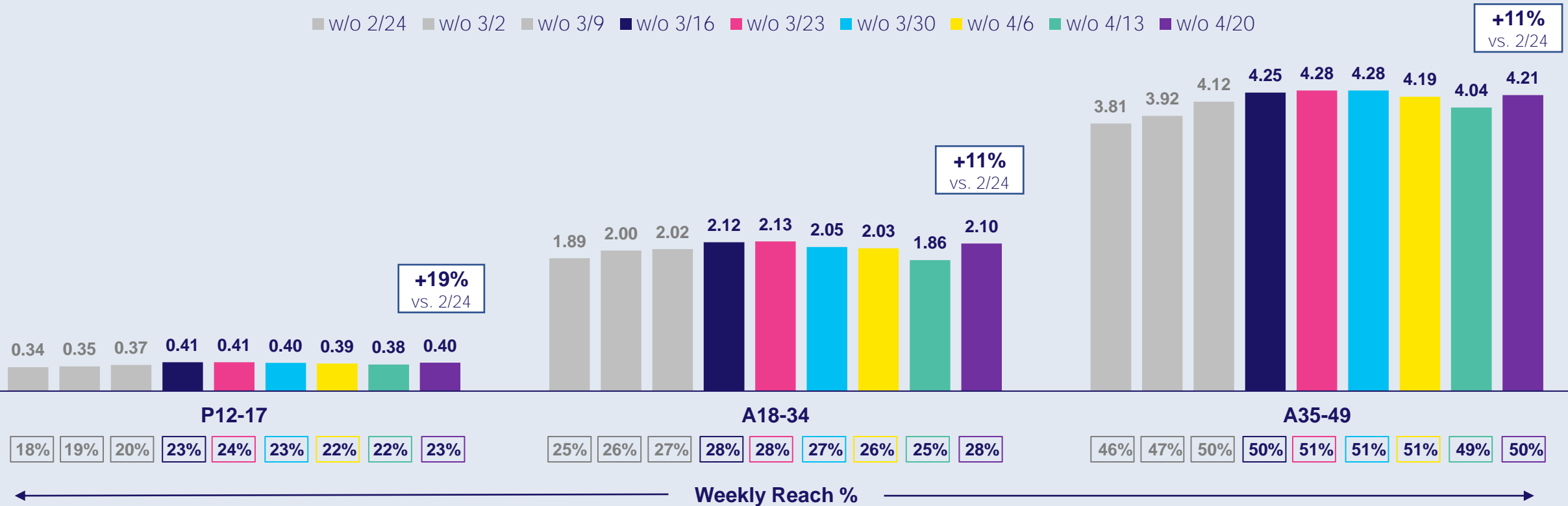
Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Prime Time represents Monday through Friday from 8p-11p. TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

Late Night: Due to innovative content and people's ability to stay up later, this daypart has been holding rather steady throughout the lockdown

▶ Against P2+, late night viewership was **10% higher** for the week of April 20th vs. Feb 24th with a 46% weekly reach

Ad-Supported TV: Late Night (M-F 11p-1a)
Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



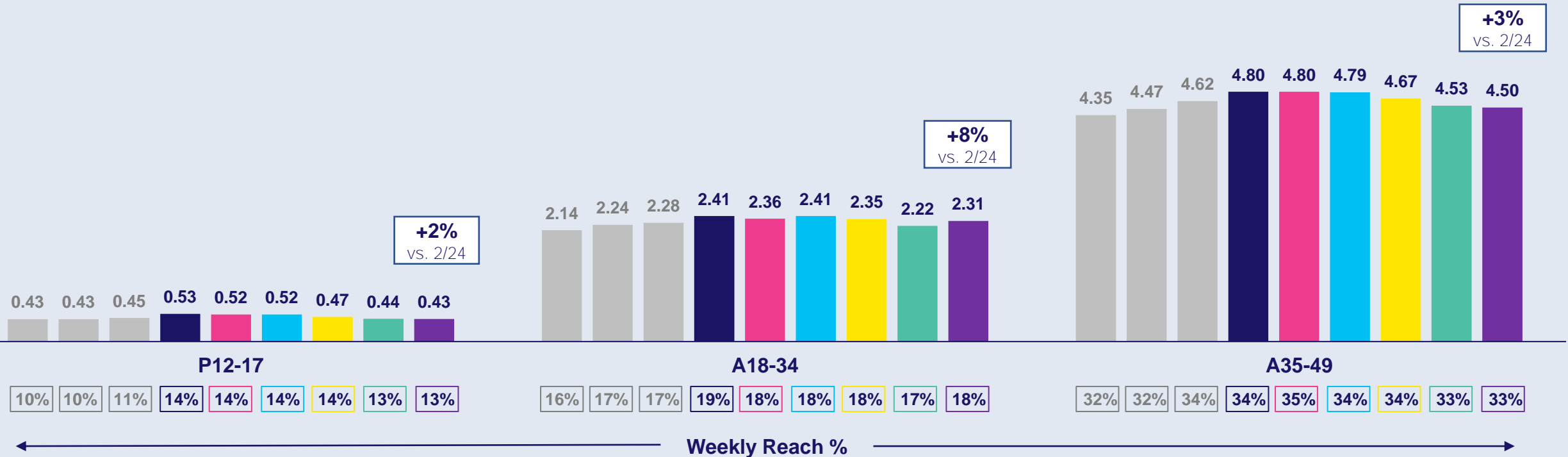
Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Late Night represents Monday through Friday from 11p-1a. TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

Overnight: A similar steadiness is seen later in the night among young adults who are staying up without worrying about a morning commute

▶ Against P2+, overnight viewership **increased 3%** vs. Feb 24th with a 31% weekly reach for the week of April 20th

Ad-Supported TV: Overnight (M-F 1a-6a) Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



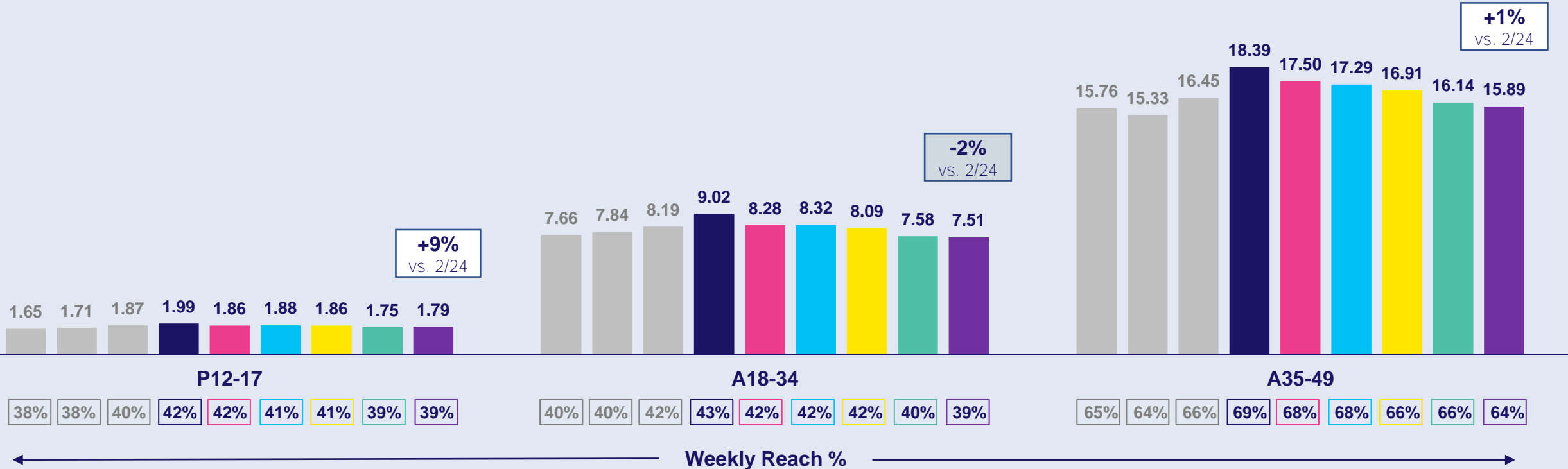
Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Overnight represents Monday through Friday from 1a-6a. TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

Weekend: Viewership is aligning more with pre-pandemic levels as people are diversifying their weekend activities after several weeks in lockdown

▶ Against P2+, weekend viewership was **3% higher** for the week of April 20th vs. Feb 24th with a 62% weekly reach

Ad-Supported TV: Weekend (Sa-Su Total Day) Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Weekend represents Saturday and Sunday total day (6a–6a). TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

Daypart Summary: Total viewing of ad-supported TV by key audiences was double-digits higher in the sixth week of mass lockdowns vs. late-February

Ad-Supported TV % Differences: w/o 4/20 vs. w/o 2/24

	P2+		P12-17		P18-34		P35-49	
	Reach	Time Spent	Reach	Time Spent	Reach	Time Spent	Reach	Time Spent
Total Day*	+4%	+12%	+16%	+32%	+5%	+11%	+3%	+14%
Early Morning (M-F 6a-9a)	-5%	-2%	-15%	-14%	-10%	-5%	-6%	-6%
Daytime (M-F 9a-4p)	+15%	+27%	+58%	+129%	+15%	+26%	+16%	+35%
Early Fringe (M-F 4p-7p)	+3%	+15%	+7%	+32%	+5%	+14%	+4%	+21%
Prime Access (M-F 7p-8p)	+2%	+8%	+10%	+17%	+3%	+6%	+2%	+11%
Prime (M-F 8p-11p)	+2%	+5%	+5%	+18%	+2%	+4%	+1%	+5%
Late Night (M-F 11p-1a)	+9%	+10%	+29%	+19%	+12%	+11%	+9%	+11%
Overnight (M-F 1a-6a)	+6%	+3%	+34%	+2%	+8%	+8%	+4%	+3%
Weekend (Sa-Su 6a-6a)	0%	+3%	+2%	+9%	-1%	-2%	-2%	+1%

Source: VAB analysis of Nielsen R&F Time Period Report, Live, w/o 2/24 & w/o 4/20; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks).
 *Total Day - reach reflects average daily reach for the week (Monday-Friday) and 'time spent' reflects total weekly minutes viewed (Monday-Friday). Note: Reach difference reflects percentage change, not percentage point



Major Takeaways: **When Are They Watching?**

- ▶ **As households establish new morning routines, we see viewership in early morning decline.**
- ▶ **Across all ages, Daytime continues to offer a significant reach and engagement opportunity, a function of individuals at home**
- ▶ **With “live at home” programming, Late Night also offers marketers a committed and attentive audience**
- ▶ **Reflective of our changed patterns and daily routines, the overnight hours have emerged as another reach opportunity**

What Are People Watching?

Genres

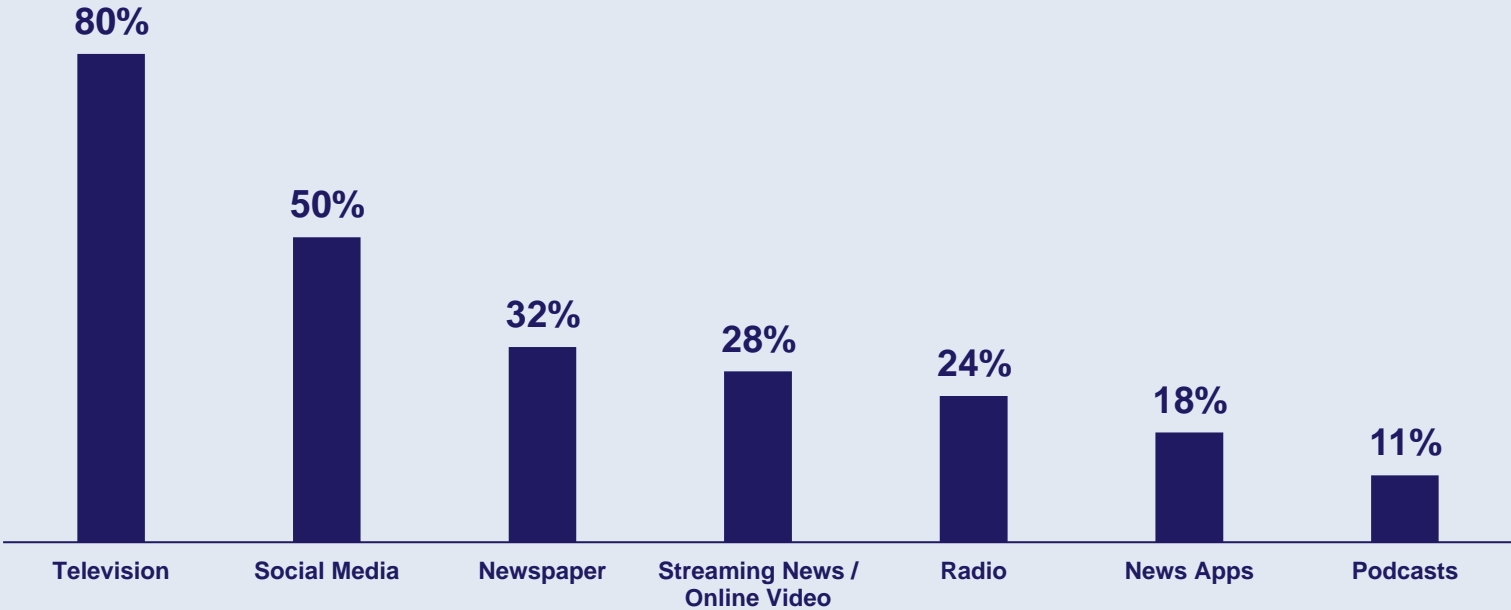


Adults are choosing **television** as their **primary source for acquiring news** - above other platforms like social media, newspapers and radio



Primary Sources for Acquiring News Since COVID-19 Outbreak

% of respondents who acquire news through the following platforms
P18+



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). Q5: What are the primary sources you have been using to acquire your news?. Does not equal 100% due to the ability to choose multiple responses.

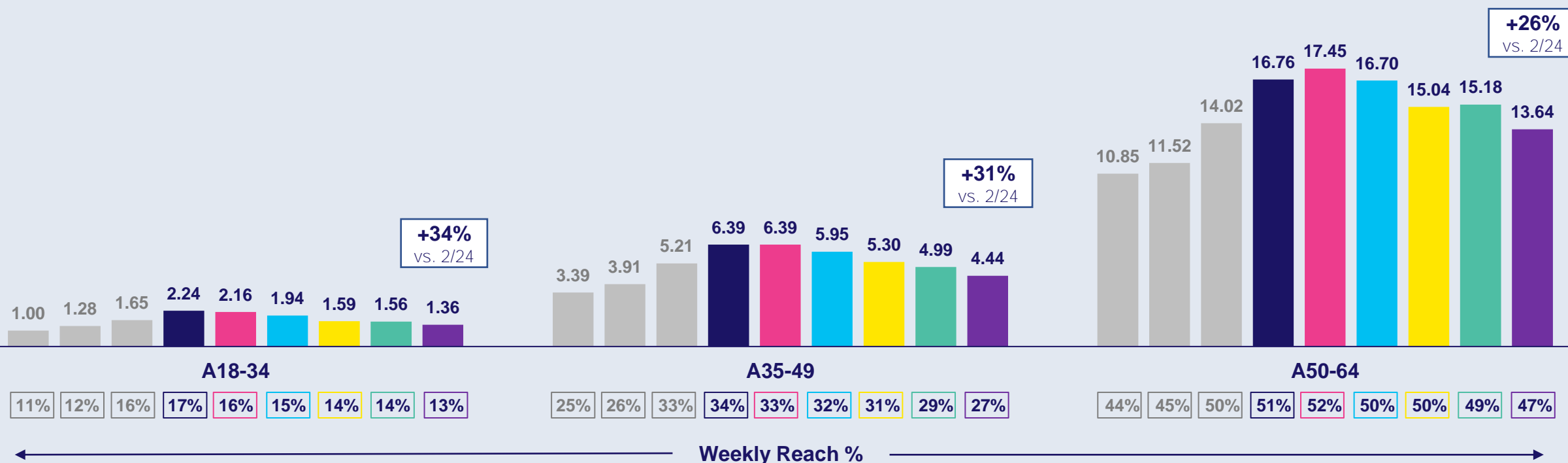
Cable TV News: News consumption has leveled off in recent weeks but continues to show significant double-digit growth vs. pre-pandemic

▶ Against P2+, cable news viewership was **22% higher** for the week of April 20th vs. Feb 24th with a 30% weekly reach

Ad-Supported Cable TV: News Programming

Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Program Report, Live, Total Day, Monday – Sunday, February 24 – April 26, 2020; Demos: P2+, A18-34, A35-49, A50-64, Viewing Source: Ad-Supported Cable TV (includes Spanish Language Networks). News Programming represents: news, news documentary and political programming. TV Universes (000): A18-34 (70,060), A35-49 (59,410), A50-64 (61,220).

The #1 way people are coping during this stressful time of the pandemic is watching TV and movies

Ways To Deal With Stress During the COVID-19 Pandemic

% of respondents who agree
P18+

77%

TV &
Movies



65%

Music



42%

Cooking &
Baking



41%

Social
Media



40%

Video
Games



34%

Self
Care



29%

Hang With
Family



25%

Learn
Something
New



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). Q8: During this Pandemic, are any of the following helping you deal with stress?

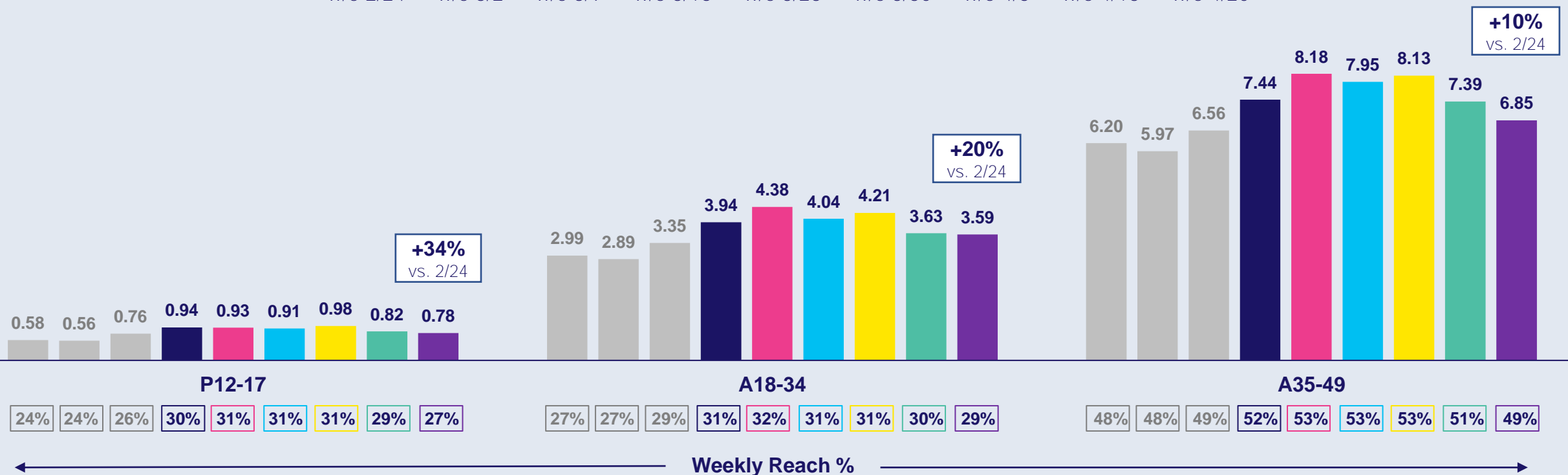
Movies/Films: Movies have been a popular form of escapism for viewers, especially younger ones, since the beginning of the pandemic

▶ Against P2+, at-home movie viewership was **13% higher** for the week of April 20th vs. Feb 24th with a 47% weekly reach

Ad-Supported TV: Film Programming

Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



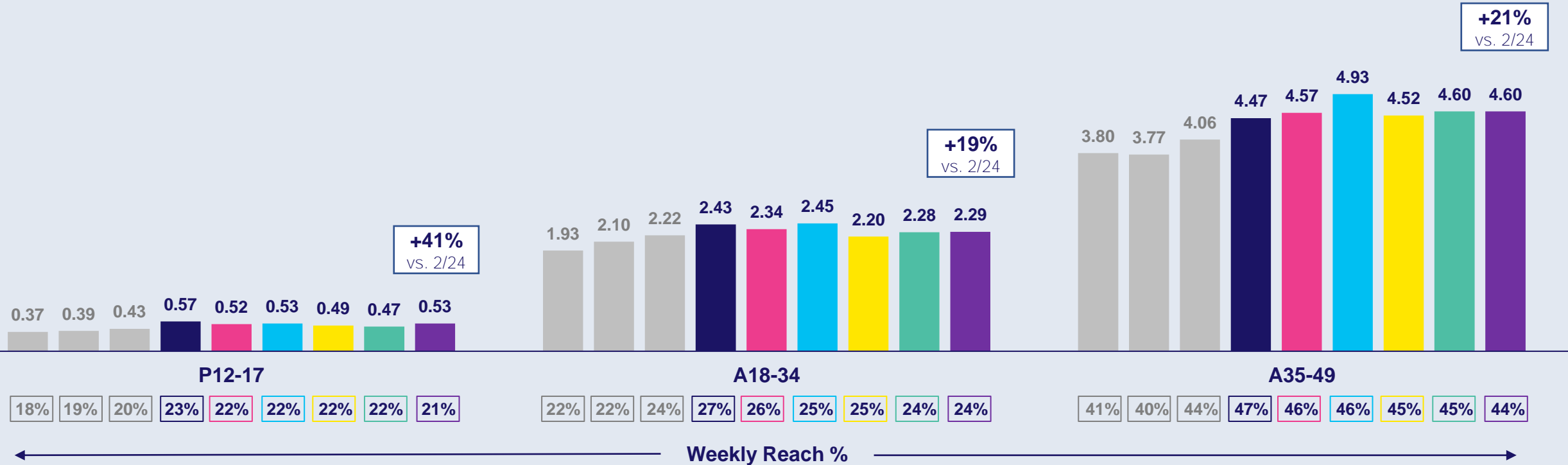
Source: VAB analysis of Nielsen R&F Program Report, Live, Total Day, Monday – Sunday, February 24 – April 26, 2020; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Film Programming represents: feature film programming. TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

Comedy: Viewers of all ages have also been looking for laughs as a temporary escape from the seriousness of the pandemic

▶ Against P2+, comedy viewership was **17% higher** for the week of April 20th vs. Feb 24th with a 42% weekly reach

Ad-Supported TV: Comedy Programming Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Program Report, Live, Total Day, Monday – Sunday, February 24 – April 26, 2020; Demos: P2+, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Comedy Programming represents: comedy variety & situation comedy. TV Universes (000): P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).

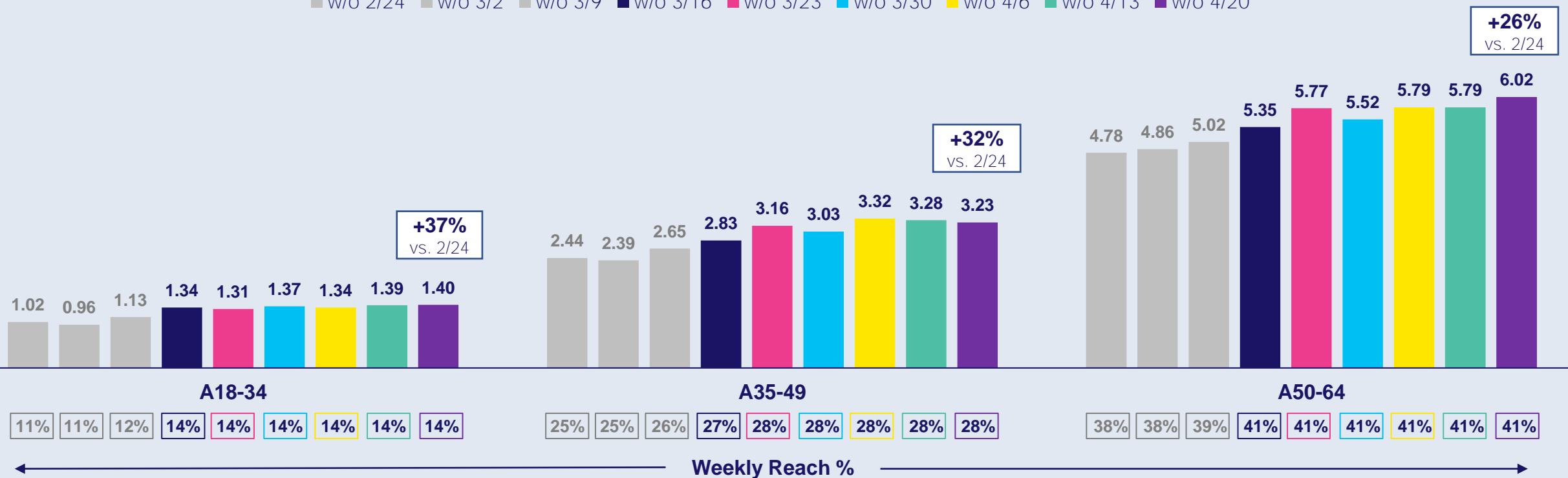
Instructional / Advice: Cooking, home improvement, self- help shows continue to be strong as people work on their hobbies, crafts & interests

▶ Against P2+, instructional viewership was **24% higher** for the week of April 20th vs. Feb 24th with a 27% weekly reach

Ad-Supported TV: Instructional / Advice / Lifestyle Programming

Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



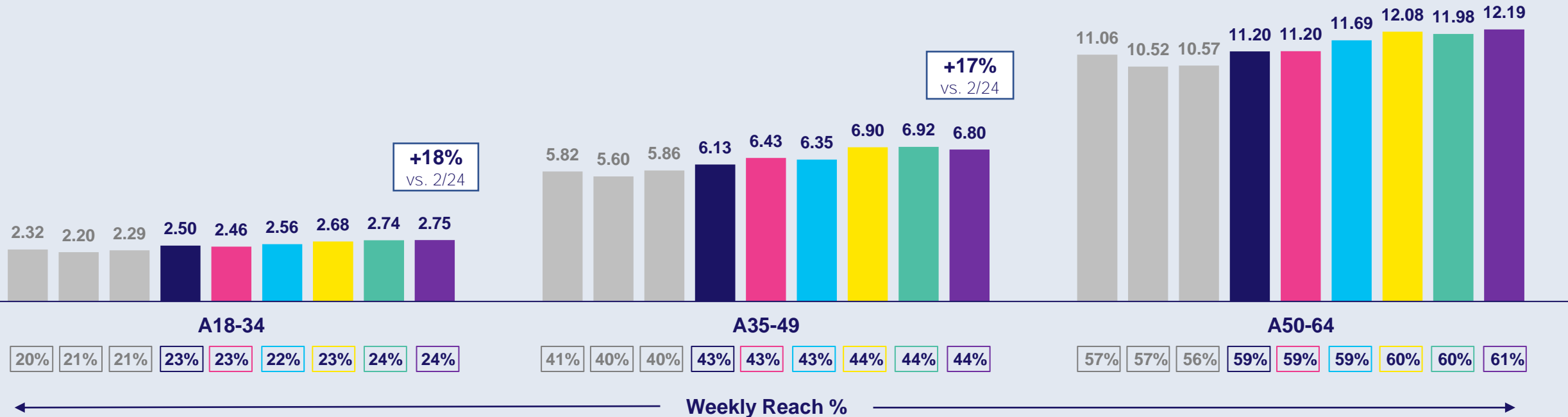
Source: VAB analysis of Nielsen R&F Program Report, Live, Total Day, Monday – Sunday, February 24 – April 26, 2020; Demos: P2+, A18-34, A35-49, A50-64, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Instructional / Advice / Lifestyle Programming represents: Instruction-Advice program type. Reflects programming from networks like HGTV, Food Network, DIY Network, Cooking Channel and Travel Channel.
TV Universes (000): A18-34 (70,060), A35-49 (59,410), A50-64 (61,220).

Documentaries: People have also taken the opportunity to acquire more in-depth knowledge around topics of interest

▶ Against P2+, documentary viewership was **14% higher** for the week of April 20th vs. Feb 24th with a 42% weekly reach

Ad-Supported TV: Documentaries
Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



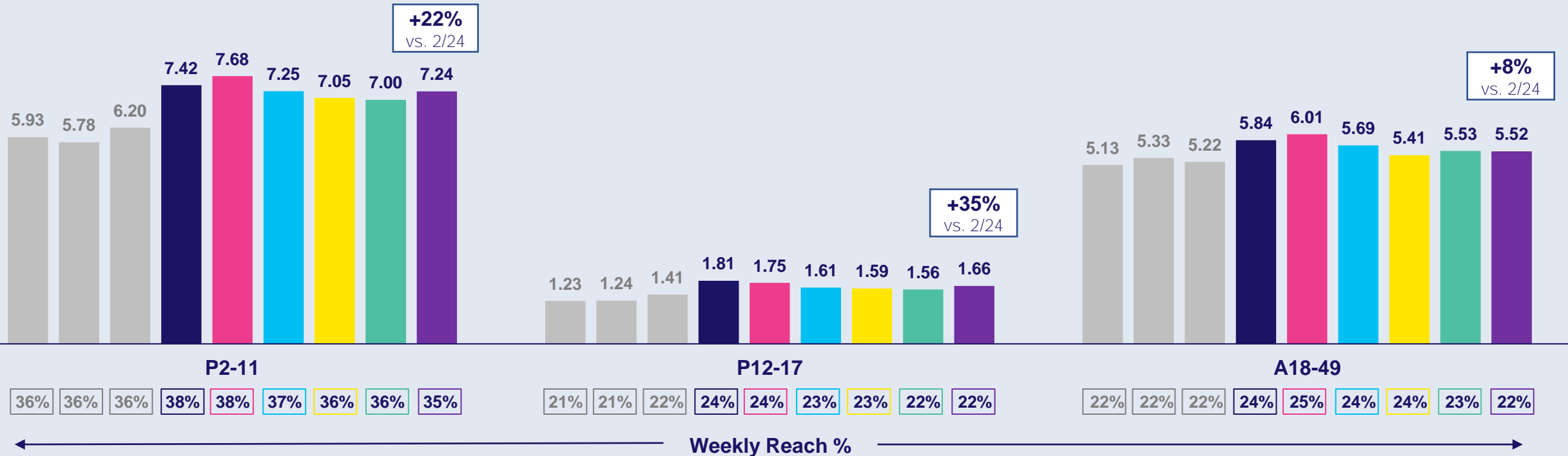
Source: VAB analysis of Nielsen R&F Program Report, Live, Total Day, Monday – Sunday, February 24 – April 26, 2020; Demos: P2+, A18-34, A35-49, A50-64, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Documentaries represents: general documentary programming. TV Universes (000): A18-34 (70,060), A35-49 (59,410), A50-64 (61,220).

Kids: Viewership saw a slight bump during the week of April 20th for both children and teenagers but is mostly stable over the last month

▶ Against P2+, kids' programming was **13% higher** for the week of April 20th vs. Feb 24th with a 28% weekly reach

Ad-Supported TV: Kids Programming Total Weekly Minutes Viewed (in billions)

■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Program Report, Live, Total Day, Monday – Sunday, February 24 – April 26, 2020; Demos: P2+, A18-34, A35-49, A50-64. Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Kids Programming represents: Child – Live, Child Day – Animation, Child Evening, Child Multi-Weekly, Children's News. Ad-supported cable TV makes up at least 97% of total TV viewership across each of the four weeks. TV Universes (000): P2-11 (39,610), P12-17 (24,480), A18-49 (129,470).

72% of adults 18+ are watching TV and movies with their families more often during the COVID-19 lockdown

“Watching TV or movie together as a family has become more common”

% of respondents who agree



P18-24: 70%

P25-34: 73%

P35-44: 85%

P45-54: 75%

P55+: 72%

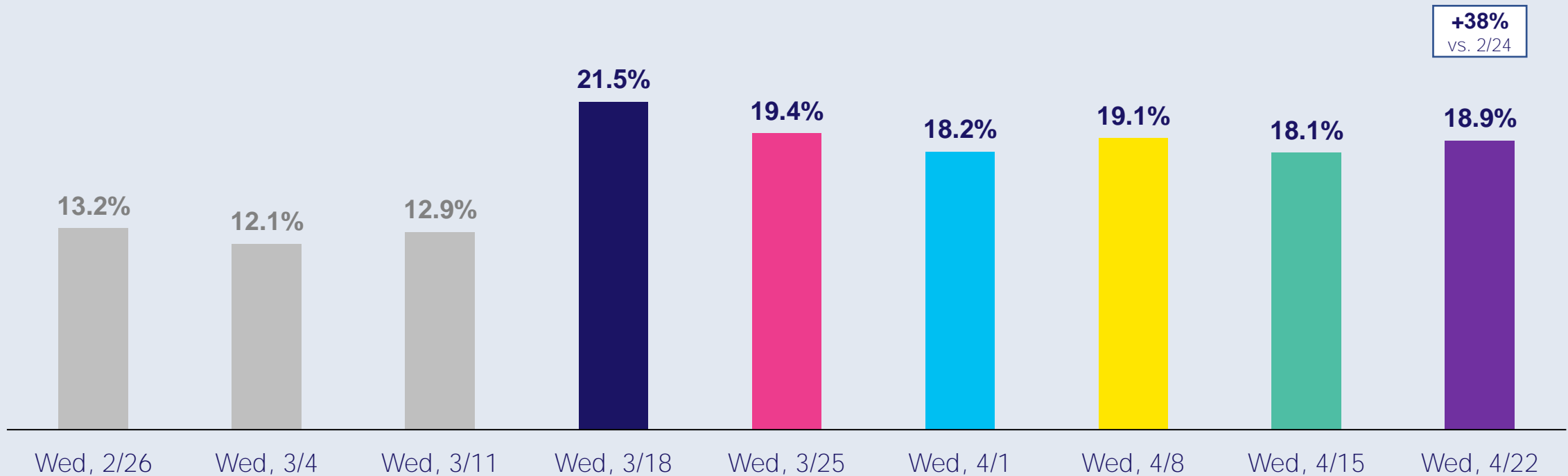
HHI \$100K+: 79%

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. Top 2 box (agree completely, agree somewhat).

Co-Viewing: Although the co-viewing spike has leveled off in the past few weeks, more opportunities exist across programs and genres than pre-pandemic

Ad-Supported TV Co-Viewing Share: Daytime Programming (9a-4p)

Households with Kids: P18+ viewing with P2-17



How To Read: On average, 18.9% of P18+ within HHs w/kids were watching TV with a person 2-17 during 9a-4p on 4/22.

Source: VAB analysis of Nielsen Co-Viewing Program Report, Live, Daytime (M-F 9a-4p), 2/26/20, 3/4/20, 3/11/20, 3/18/20, 3/25/20, 4/1/20, 4/8/20, 4/15/20, 4/22/20; Market Break: HHs with children (2-17), primary demo: P18+, secondary demo: P2-17. Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks). Co-viewing share = the average percentage of adults 18+ within HH w/kids who are watching TV during that day (M-F 9a-4p) with a person 2-17.



Major Takeaways: **What Are They Watching?**

- ▶ **People most often turn to TV for their news content**
- ▶ **At the same time, when looking to destress, Americans most often turn to TV and Film, underscoring the dual role TV is playing in American life**
- ▶ **In looking to destress, there is an increase in the popularity of ‘feel good’ programming that serves as a welcome distraction**

Key takeaways for marketers about COVID-19 related viewership trends



Thirst for Video Content

As viewers hunger for new video content, consumption is up across linear, VOD and streaming. Due to shifts in daily routines and behaviors, there is particular opportunity within Daytime, Late Night and Overnight, as well as within “feel-good” programming as viewers look to destress.



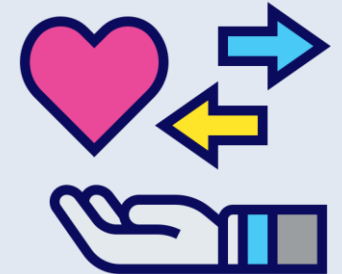
Adopting New Platforms and Technologies

With more time to fill – and more time to learn about new platforms and devices – consumers are adopting new ways of viewing video. This is seen in increased adoption of AVOD services, offering advertisers more ways to reach and engage viewers.



The Eyeballs of Sports Fans

Sports fans, a primary audience for many brands, continue to engage with television even with the absence of live sports. They have simply shifted their viewing to news, movies, and other entertainment programming.



Rewarding Compassion, Commitment and Community

Hundreds of brands have integrated authentic, COVID-19 related themes into their advertising which fosters a greater connection within their communities and helps increase their perception among consumers.

Thank You

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