

# A Fresh Take On

Staying ahead of evolving dynamics in the marketplace and our culture

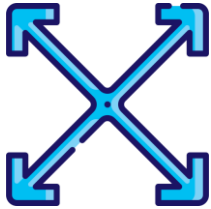
## Quantifying TV Audiences



In this latest *'Fresh Take On,'* we partner with iSpot.tv to demonstrate how metrics, particularly ad ratings, can be applied to measure and quantify audiences.

We focus on the heart of the COVID pandemic **as our 'moment in time.'** During this period, there was a particular agility in TV as networks quickly pivoted their programming to combat the challenges posed by COVID. These production-related pivots excited viewers and ignited their interests as they discovered innovative shows, experimental programming and new genres.

# Three main components of iSpot's modern measurement to better understand TV audiences' viewing behaviors



## Scale

iSpot utilizes a large panel of TV ad data that requires no in-home calibration or maintenance. The panel is calibrated against multiple forms of measurement, including set-top box, smart TV, personal-level panels, census data, device graphs and household demographics; resulting in a representative view of TV audiences.



## Measure Ads, Not Programs

Ads are increasingly getting decoupled from programs given the continued growth in streaming and addressable in viewing environments. The best way to get accurate measurement is on-the-glass verification of ads, a method which iSpot utilizes to detect all ads across their footprint of 18 MM TVs.



## Count All Forms of TV

Today, TV ad measurement must account for linear, streaming, addressable, cable, over-the-air, set-top box and various forms of streaming devices. iSpot can detect ads across all of these formats to present a full picture **on when and where a brand's ad** appeared and its performance relative to audience attention, effectiveness and business outcomes.

*See appendix for the overall methodology of iSpot.tv's media measurement*



## Summary: Quantifying TV Audiences During COVID

- ▶ According to iSpot data, the number of chances brands had to reach households increased during the year of the pandemic, with year-over-year average ad ratings up 6%
- ▶ **Across time periods, dayparts and genres, major demos' ad ratings (A18-49 & A25-54) were generally in line with household ratings and did not experience any meaningful variances**
- ▶ Viewers expanded their daypart viewing during the pandemic but sought out unique experiences that ignited their interest throughout the day - or time of week - between news, entertainment and instructional, binge-able programming
- ▶ Audiences also discovered and embraced new genres and innovative formats that they may not have typically watched in the past such as game shows, news magazines and interview / talk shows

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# Viewership grew as TV pivoted

## TV ad ratings by time period

\*iSpot's Ad Rating = a measure of total households where at least one TV had a verified exposure to a given TV ad. The verification is done by the on-screen detection of the ad play in 18M homes, balanced and extrapolated to the U.S. Census. The 'average ad rating' is the average of all ad units within each day, daypart and measured network.

# Understanding the emotional significance of TV during a crisis, programmers and distributors were fast to offer **free access to content and even Wi-Fi** at the onset of the pandemic



**'Star Trek: Picard' Star Patrick Stewart Announces Free Month of CBS All Access**



**AMC Networks Offers Free Programming Amid Coronavirus Pandemic**



**Comcast offers free Xfinity WiFi nationwide amid COVID-19 pandemic**



**AMC Networks Offers Free Programming Amid Coronavirus Pandemic**



**NBCU Opens News Nets to All Pay TV Subscribers**

MSNBC, CNBC content added to NBC News Now



**UP Faith & Family Is Streaming *Bringing Up Bates*, Movies and More for Free amid Coronavirus**

UP Faith & Family is doing its part to help viewers pass the time with a list of "smile-inducing" entertainment at no cost



**Ovation TV Offers Free Programming For 'Virtual' Arts Advocacy Day**

'The Art Of,' 'The Method,' 'Inside the Actors Studio' episodes available to all



**Sampling Trend: Xfinity X1, Flex Make VOD From 2 Dozen Latino, A-A Networks, SVODs Free, For Now**



**Fox News offers free access 'to help educate and protect' amid coronavirus pandemic**



**Game Show Network Offers Free Preview Through April**  
Net expects to add homes from this outreach during virus outbreak



**Discovery Education Offers Social Distancing 101 App**

Uses AI to help teachers get message across

# TV brands also quickly pivoted their programming content with more news, more specials, binge-able marathons of popular programs, re-airings of classic content and other stunts to entertain and inform viewers

 **TODAY**

Late-night stars to co-host celeb-filled 'One World: Together At Home' special

Jimmy Fallon, Stephen Colbert and Jimmy Kimmel will co-host the telecast together.

**Boston Herald**

Discovery offers 'Shark Week' in weekend binge

**VARIETY**

HGTV, TLC, Bravo and Others Say Their Reality TV Stockpile Can Outlast Coronavirus

**People**

Over 90 Hours of Puppies and Kittens Are Coming to Your TV to Make Self-Isolating Sweeter

The TV show *Too Cute!* follows baby animals through their first few months of life, and lives up to its name.

**DEADLINE**

**CBS Brings Back Sunday Movie Night Amid Pandemic With Top Paramount Titles 'Titanic', 'Indiana Jones' & 'MI'**

**CNN**

**ESPN is airing its Michael Jordan documentary series early to help fill the void of live sports**

**DEADLINE**

**Hallmark Channel Decides We Need A Little Christmas, Sets Movie Marathon Amid Coronavirus Outbreak**

**DEADLINE**

**NBC News To Air Series Of Live Primetime Specials On Coronavirus Pandemic**

**QUARTZ**

**ESPN2 is airing an esports marathon because Covid-19 has crimped live sports**

**DEADLINE**

**ESPN Fills The Coronavirus Sports Gap With Friday Night Selection Of Disney Films**

**People**

Oprah Winfrey Network Celebrating Palm Sunday and Easter Sunday with *Super Soul Sunday* Marathons

Oprah Winfrey Network will air two marathons of the inspirational series on April 5 and April 6.

**ADWEEK**

**NBCUniversal and Target Team for Family Movie Nights, Cutting Ads by a Half Hour**

USA, Syfy and E! will simulcast Harry Potter films on Fridays; Telemundo also involved

**ESPN**

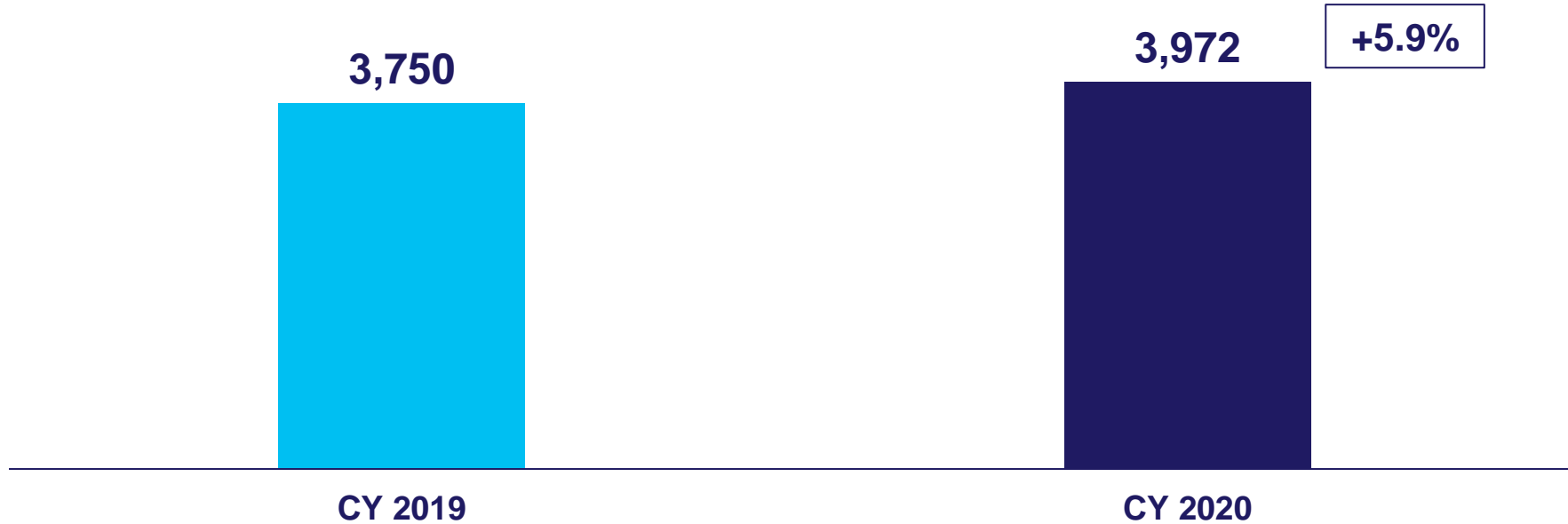
**Nets' Kevin Durant leads field of 16 in NBA 2K20 tournament on ESPN**

# Because of TV's ability to quickly pivot their content, year-over-year average ad ratings were up 6% on HHs and 5% on major demos



## Total Monthly Average Household TV Ad Rating / IMPs by Time Period

(aggregated across days, networks & dayparts)  
in millions



		<u>YoY Difference By Demo (in millions)</u>	
P18-49:	1,881	1,970	+ 4.8%
P25-54:	1,921	2,015	+ 4.9%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A 18-49 & A25-54. See appendix for more methodology details.

# Ad ratings were consistently up through the summer as news was strong, TV networks released new specials and sports returned

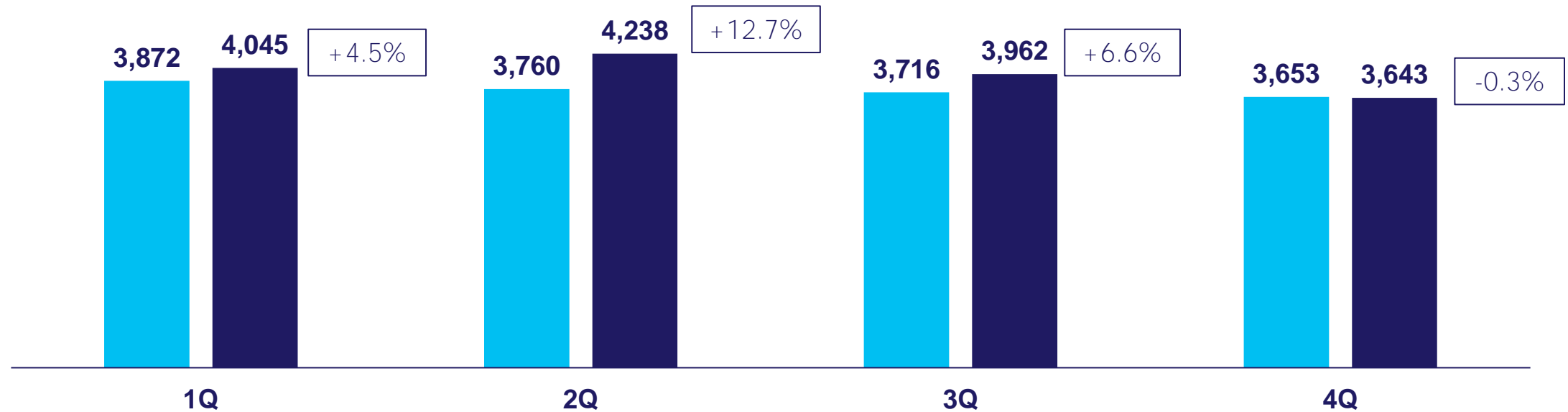


## Total Monthly Average Household TV Ad Rating / IMPs by Quarter

(aggregated across days, networks & dayparts)

in millions

■ 2019 ■ 2020



YoY % Difference By Demo				
P18-49:	+2.3%	+11.4%	+5.9%	-0.6%
P25-54:	+2.8%	+11.9%	+6.3%	-1.5%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A18-49 & A25-54. See appendix for more methodology details.

# Major demos were very much in line with monthly household ad ratings throughout the year, with very little fall off by comparison

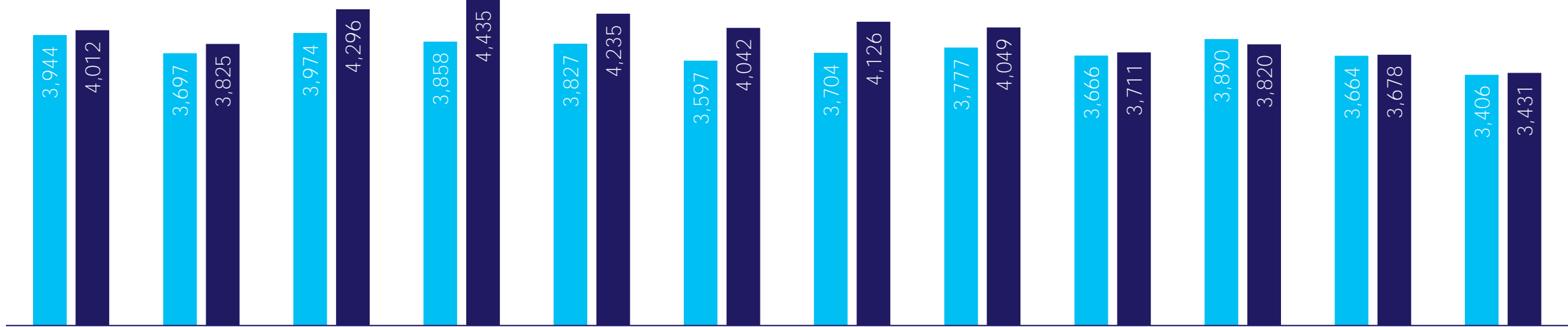


## Total Monthly Average Household TV Ad Rating / IMPs

(aggregated across days, networks & dayparts)

in millions

■ 2019 ■ 2020



YOY % Diff:	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	+2%	+3%	+8%	+15%	+11%	+12%	+11%	+7%	+1%	-2%	0%	+1%

### YoY % Difference By Demo

P18-49:	-1%	+2%	+6%	+14%	+9%	+11%	+10%	+6%	+1%	-2%	0%	0%
P25-54:	0%	+1%	+7%	+14%	+9%	+12%	+11%	+7%	+1%	-2%	-1%	-1%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A18-49 & A25-54. See appendix for more methodology details.

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# Viewers expanded their daypart diet for different experiences

## TV ad ratings by daypart

\*iSpot's Ad Rating = a measure of total households where at least one TV had a verified exposure to a given TV ad. The verification is done by the on-screen detection of the ad play in 18M homes, balanced and extrapolated to the U.S. Census. The 'average ad rating' is the average of all ad units within each day, daypart and measured network.

# With the rise in 'work from home,' audiences were able to watch programming in more dayparts than they did pre-pandemic

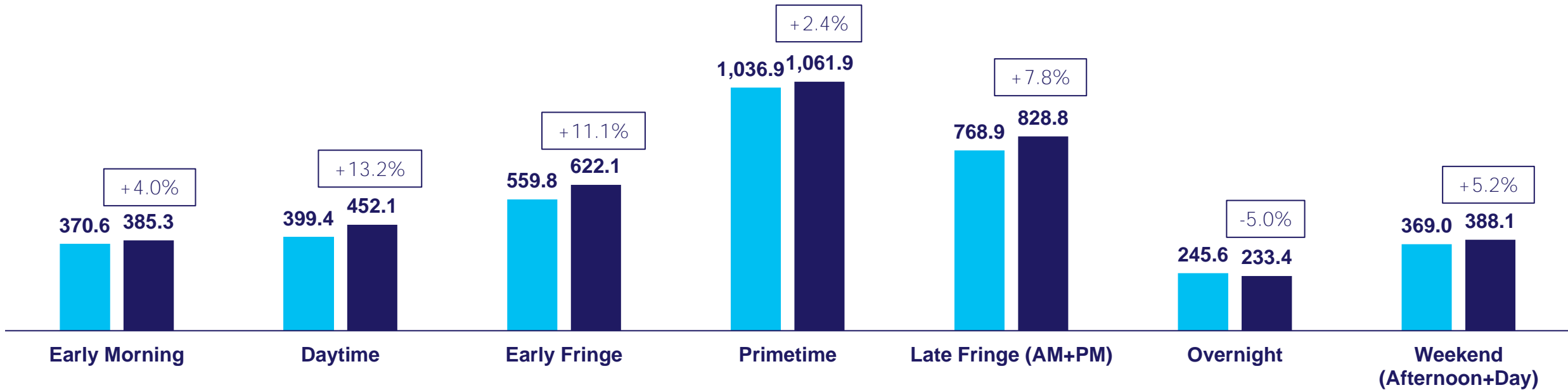


## Total Monthly Average Household TV Ad Rating / IMPs by Daypart

(aggregated across days & networks)

*in millions*

■ 2019 ■ 2020



### YoY % Difference By Demo

P18-49:	+3.4%	+12.3%	+10.2%	+1.4%	+6.2%	-6.0%	+3.6%
P25-54:	+2.7%	+11.6%	+9.4%	+2.0%	+6.6%	-5.6%	+4.7%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A18-49 & A25-54. See appendix for more methodology details.

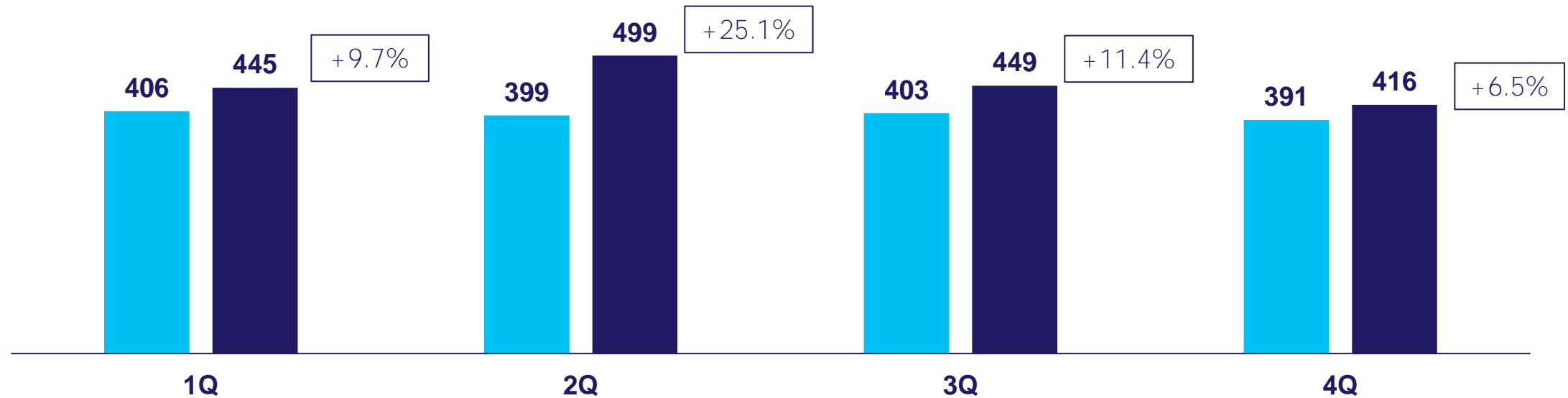
# Daytime: News & talk programming drove increased viewership during traditional 'work hours' through 2020

## Daytime: Total Monthly Average Household TV Ad Rating / IMPs by Quarter

(aggregated across days & networks)

in millions

■ 2019 ■ 2020



### YoY % Difference By Demo

P18-49:	+7.5%	+24.4%	+10.9%	+6.4%
P25-54:	+8.1%	+24.5%	+9.9%	+3.8%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A18-49 & A25-54. See appendix for more methodology details.

# Primetime: Specials, stunts and other experimental programming excited viewers and boosted ratings through the summer

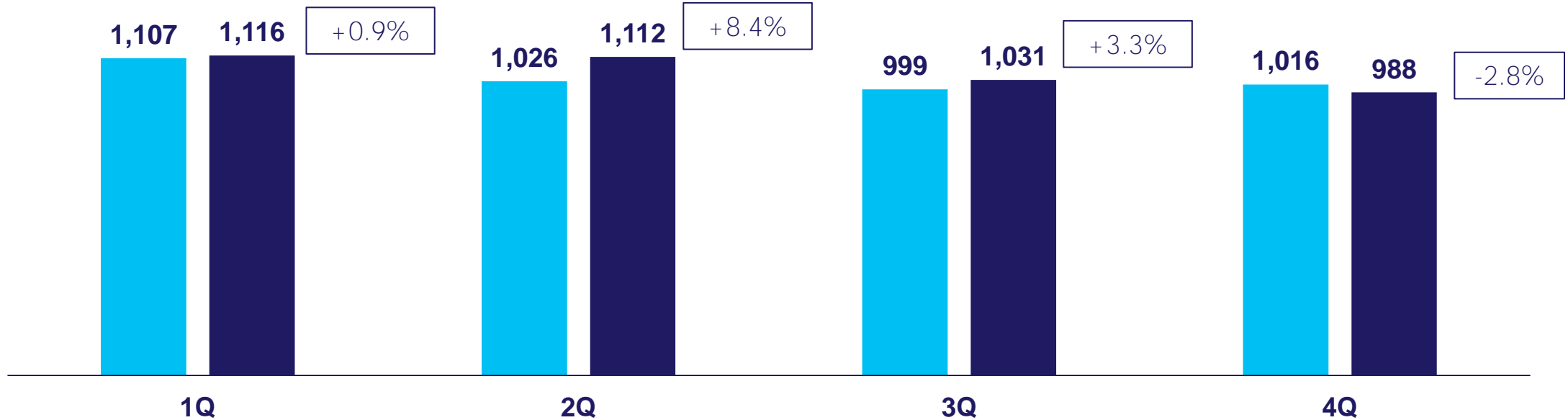


## Primetime: Total Monthly Average Household TV Ad Rating / IMPs by Quarter

(aggregated across days & networks)

*in millions*

■ 2019 ■ 2020



YoY % Difference By Demo				
	1Q	2Q	3Q	4Q
P18-49:	-1.0%	+7.0%	+2.6%	-2.9%
P25-54:	-0.4%	+7.8%	+3.5%	-2.6%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A18-49 & A25-54. See appendix for more methodology details.

# Late Fringe: The quick return of new ‘taped from home’ episodes of late-night talk shows re-ignited excitement from viewers

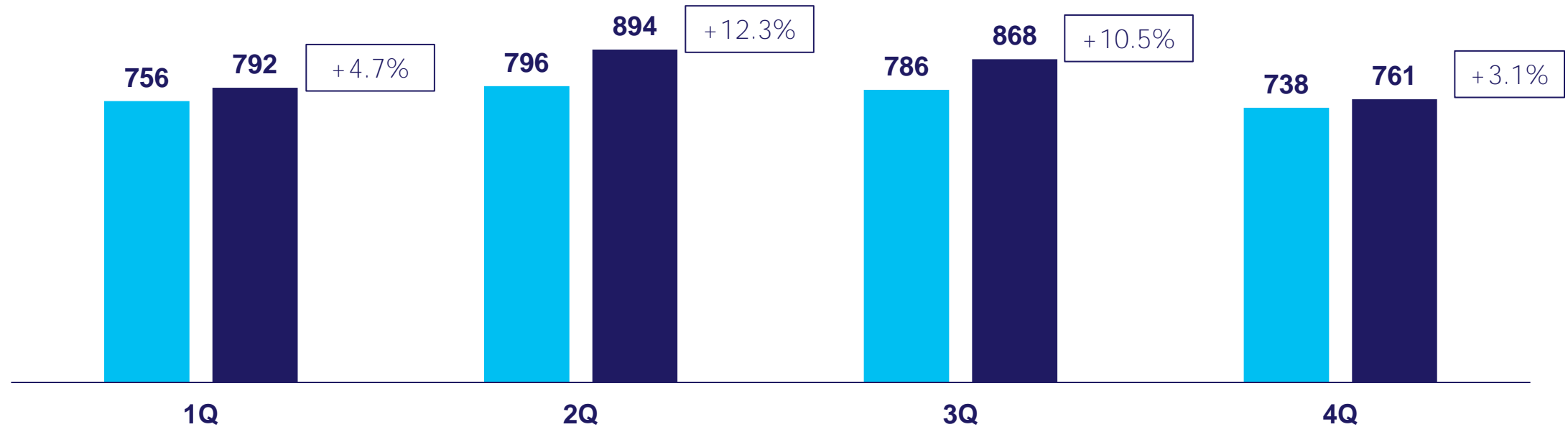


## Late Fringe: Total Monthly Average Household TV Ad Rating / IMPs by Quarter

(aggregated across days & networks)

*in millions*

■ 2019 ■ 2020



YoY % Difference By Demo				
P18-49:	+2.3%	+10.8%	+9.1%	+2.3%
P25-54:	+2.1%	+11.5%	+10.3%	+1.9%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., ‘total monthly average’). Base = households. Late Fringe includes Late Fringe AM + Late Fringe PM dayparts. See appendix for more methodology details.

# Weekend: Binge-able marathons, especially around home & food instructional programming, stirred continued interest from viewers

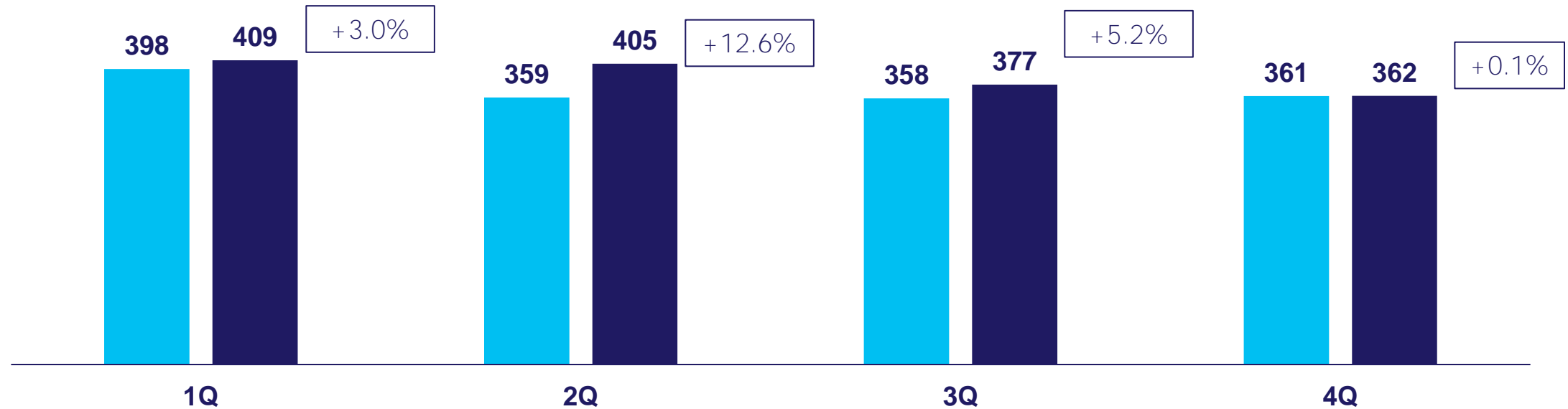


## Weekend: Total Monthly Average Household TV Ad Rating / IMPs by Quarter

(aggregated across days & networks)

*in millions*

■ 2019 ■ 2020



YoY % Difference By Demo				
P18-49:	+0.8%	+10.6%	+4.1%	-0.8%
P25-54:	+2.4%	+11.4%	+5.0%	0.0%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households. Weekend includes Weekend Day+ Weekend Afternoon dayparts. See appendix for more methodology details.

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# Viewers discovered new genres and embraced different formats

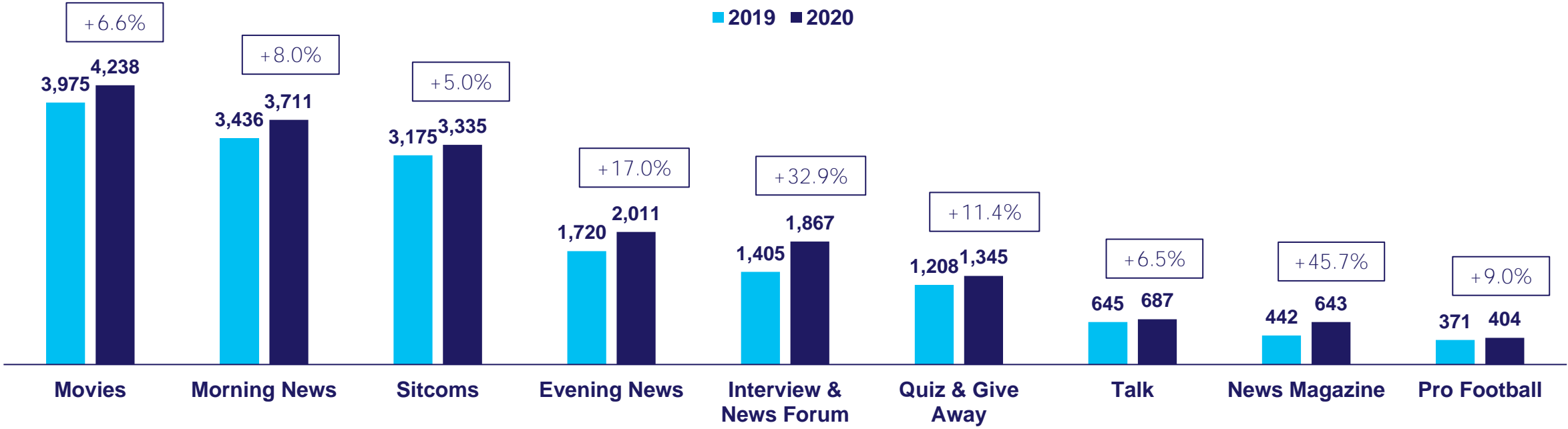
## TV ad ratings by genre

\*iSpot's Ad Rating = a measure of total households where at least one TV had a verified exposure to a given TV ad. The verification is done by the on-screen detection of the ad play in 18M homes, balanced and extrapolated to the U.S. Census. The 'average ad rating' is the average of all ad units within each day, daypart and measured network.

# Audiences sought out additional genres and innovative formats that they might not normally have watched before the pandemic



**Total Monthly Average Household TV Ad Rating / IMPs by Top Sub-Genre**  
 (aggregated across days, networks & dayparts)  
*in millions*



YoY % Difference By Demo

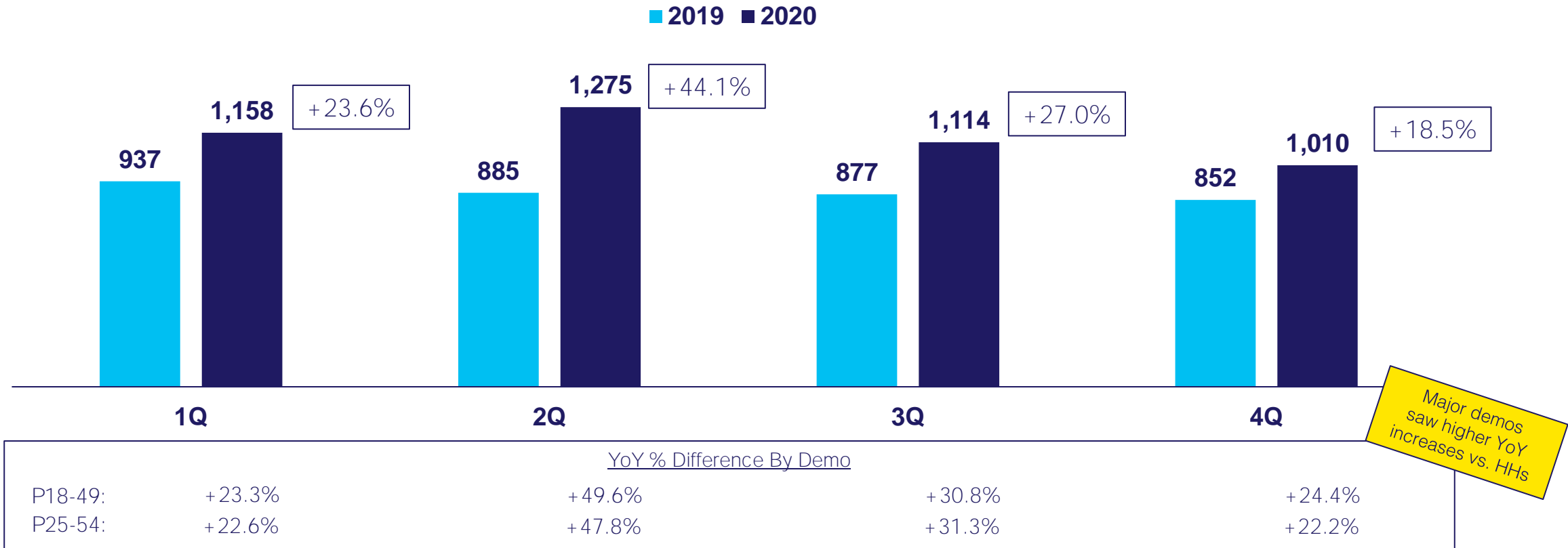
P18-49:	+4.4%	+10.0%	+4.5%	+21.1%	+42.1%	+9.6%	+6.8%	+47.4%	+8.6%
P25-54:	+4.9%	+8.9%	+5.5%	+23.4%	+41.3%	+7.6%	+5.6%	+44.2%	+9.3%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A18-49 & A25-54. Chart reflects sub-genres within top 20 based on monthly average ad impressions that had YoY increases.

# News & Information: A continuous news cycle on COVID, the election and social unrest kept viewers engaged through the year



**News & Information: Total Monthly Average Household TV Ad Rating / IMPs by Quarter**  
 (aggregated across days, networks & dayparts)  
 in millions

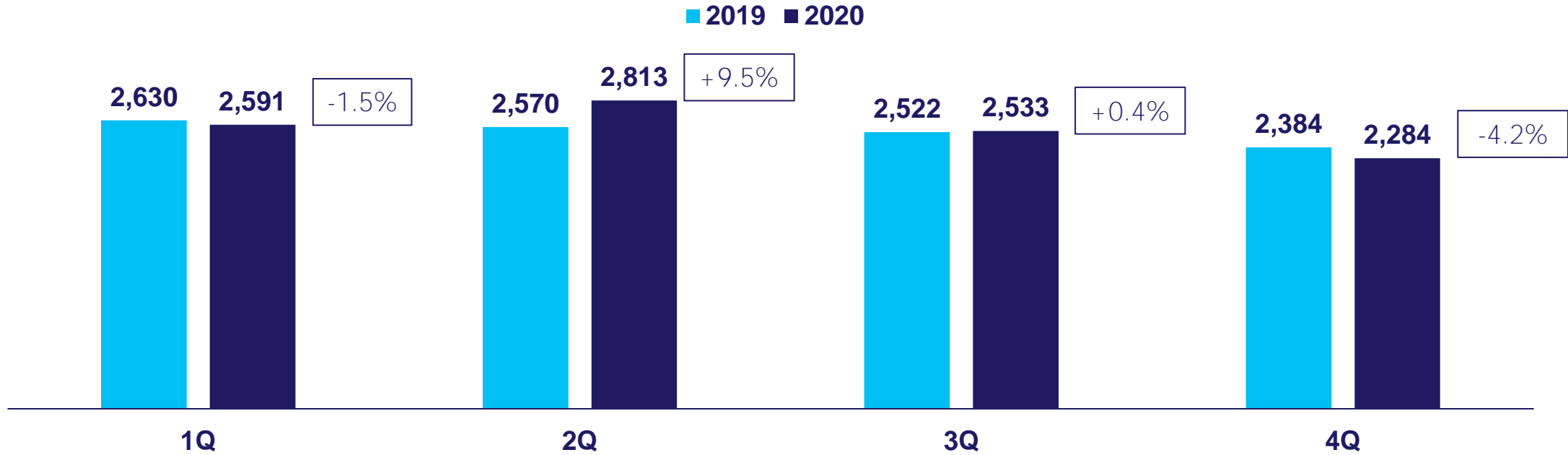


Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A18-49 & A25-54. See appendix for more methodology details.

# Entertainment: Binge-able marathons, specials and experimental ‘live/taped from home’ shows helped boost viewing through summer

## Entertainment: Total Monthly Average Household TV Ad Rating / IMPs by Quarter

(aggregated across days, networks & dayparts)  
in millions



YoY % Difference By Demo				
P18-49:	-3.5%	+7.9%	-0.9%	-5.5%
P25-54:	-2.8%	+8.7%	-0.4%	-6.2%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., ‘total monthly average’). Base = households, with A18-49 & A25-54. See appendix for more methodology details.

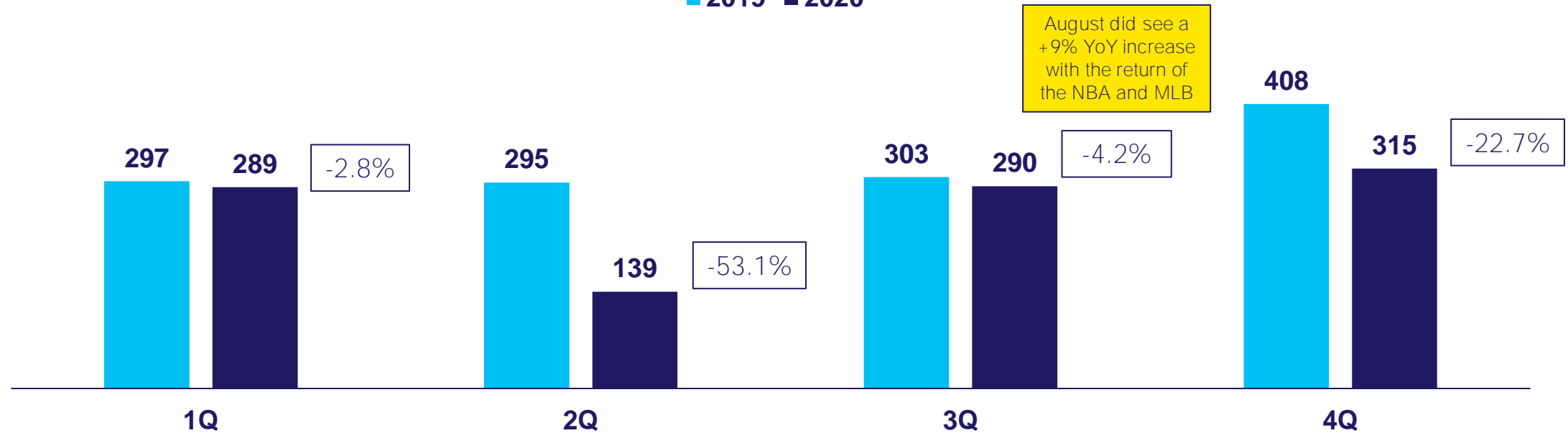
# Sports: With viewers thirsty for competitive action, the return of NBA and MLB stabilized audiences during the summer

## Sports: Total Monthly Average Household TV Ad Rating / IMPs by Quarter

(aggregated across days, networks & dayparts)

in millions

■ 2019 ■ 2020



### YoY % Difference By Demo

P18-49:	-3.4%	-54.3%	-3.2%	-22.6%
P25-54:	-1.8%	-54.5%	-3.0%	-23.4%

Source: iSpot.tv. Data represents 117 measured broadcast and cable TV networks and is based on national ad units viewed on a live + same day basis, plus up to 30-day time-shifted, includes over-the-top streaming, over-the-air transmissions. Data is built up from individual ad impressions for every national ad unit (i.e., ad ratings), as extrapolated from the iSpot.tv panel to the U.S. TV viewer census. The resulting data set takes the average ad rating within each day, network and daypart combination and is then added up to generate results for all of TV (i.e., 'total monthly average'). Base = households, with A18-49 & A25-54. See appendix for more methodology details.

# Key Marketer Takeaways

## *For TV Viewing:*

- ▶ The ability for TV to quickly pivot during the pandemic created a host of new and innovative programming across dayparts and genres which ignited viewer interest and drove ad ratings

## *For Media Measurement:*

- ▶ Evaluate and understand the different approaches to TV audience measurement and the underlying methodologies of data providers within the ecosystem
- ▶ Utilize multiple audience measurement providers when planning and buying your video investments to ensure a higher level of data accuracy
- ▶ Continually, and rigorously, analyze these multiple third-party data sources to ensure greater transparency, accuracy and accountability through the buying process

# Discover more

Looking for more data, insights and takeaways?  
Check out this related VAB content



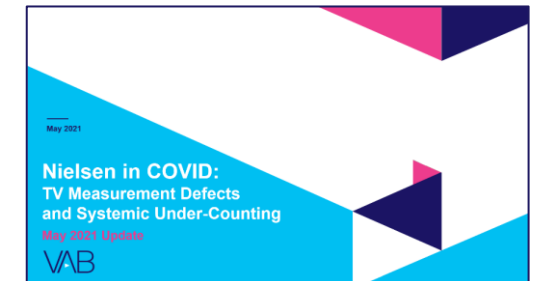
**Make Yourself at Home**  
Video Viewing in the Time  
of COVID-19



**As Time Goes By**  
How Media Consumption is Helping  
America Cope



**Five Fast Facts on**  
Nielsen TV Measurement  
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# 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

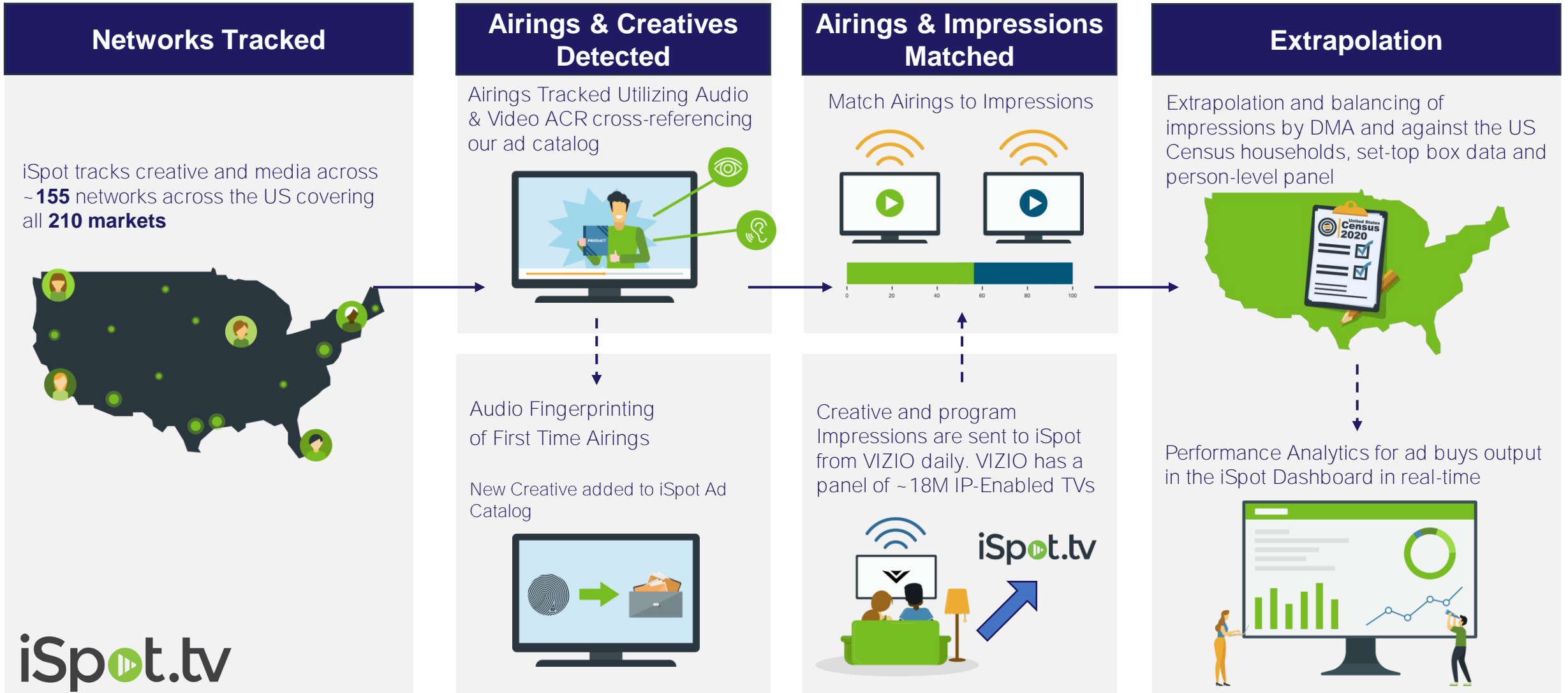
We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

## Transform

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

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# iSpot.tv Media Measurement – Overall Methodology



# iSpot's Analysis & Measurement Methodology & Details



## TV Ad Ratings / IMPs Analysis Methodology

- ▶ Analysis data is comprised of **ad ratings trended daily and monthly in aggregate** in 2020 as compared to 2019
  - ▶ National ad units viewed on a live + same day basis, plus up to 30-day time-shifted, including across over-the-top streaming and over-the-air transmissions
  - ▶ Includes 117 broadcast and cable TV networks on which every ad unit was measured throughout 2020 and 2019
- ▶ Data is **built up from individual ad impressions (i.e., ad ratings)** for **every national ad unit, as extrapolated from iSpot.tv's panel to U.S. TV Viewer Census**
- ▶ The resulting data set takes the **average ad rating within each day, network and daypart combination** which is then added up by comparable month to generate results for all of TV
  - ▶ Data can then be filtered by network, program genre, daypart, etc

## iSpot.tv Media Measurement Methodology Details

- ▶ Media unit accuracy is **audited internally at a 99% accuracy** and is also audited externally by iSpot clients and the MRC (pending accreditation)
- ▶ Entire iSpot ad catalog is tracked on **18 MM smart TVs using ACR technologies** to verify ad play
- ▶ The Smart TV panel has rigorous standards for a TV set to be included
  - ▶ TV must be **fully opted in** by consumer, **IP address must be stable**, TV must have been **collecting data for at least 90 days**, there is a **limit of how many new TVs** can enter the panel in any one day, TV **cannot be dormant for more than 90 days** to stay in panel
- ▶ Data is cleansed, balanced and **extrapolated to U.S. census** in all 210 markets
  - ▶ **iSpot's 2020 HH TV universe estimate: 113.3 MM**
- ▶ Each media unit on linear TV gets a **total impression and HH/TRP rating counts** for households and each major age/gender group