



THE REAL SUMMER GETAWAY:

Escaping With Premium Video Content

☰ 2018 REPORT

Member Center

 **VAB**
VIDEO ADVERTISING BUREAU

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Premium Video Content Provides The Habitual Escape And Relaxation That People Are Looking For During The Summer

Whether people are on vacation or at home this summer, one thing remains constant - people will actively seek out premium video content, in the form of both multi-screen TV brands and theatrical movie releases, to escape and relax from their daily lives.

Watching ad-supported TV and going to the local cineplex are the two most popular summer activities; they're more popular than going to the beach, barbecuing, taking a vacation or even dining out. Additionally, the evolution of near-ubiquitous broadband connectivity has turned summer "reading lists" into summer "streaming lists" and have opened up more video viewing occasions for people to watch their favorite TV shows when away from their living rooms.

But make no mistake, even in the summer, Television continues to represent the large majority of overall video consumption. Between original programming, specials and sports, there is a wide breadth of summertime ad-supported TV content available. Because of this, tune-in and reach of ad-supported TV shows a steadiness and stability in relation to other time periods throughout the year, with only a minimal drop-off from a time spent perspective.

Also, due to the abundance of "live" TV content and near-weekly blockbuster theatrical releases, nothing gets people talking online during the summer like ad-supported TV and cinema as both are some of the most popular topics that trend on Twitter.

For those looking for millennials this summer, cinema delivers both a high reach and high concentration of those looking to escape and relax with friends. In fact, the millennial audience composition of cinema is higher than popular, targeted digital platforms like Snapchat, Instagram and YouTube.

With all the great original content available during the summer, it's no surprise that people consider their time spent with premium, multi-screen video to be their real summer getaway.

Summer Reading List - SparkNotes

Summer Activities: Understanding Seasonal Behaviors

- 93% of P18+ watch ad-supported TV during the summer
- 62% of P18+ go to the cinema
- 66% of P18+ believe TV is a good escape, while 60% say that TV relaxes them
- 64% of streamers say they are “streaming shows / series in places where they used to read”
- 77% of streamers use TV network websites/apps during the summer

Summer TV Trends: Showcasing Season-long Stability

- HHs tune into ad-supported TV an average of 25 days per summer month, on par with the rest of the year
- Average monthly summer reach for P13-17 (90%) is steady vs. other time periods throughout the year
- On average, monthly time spent with ad-supported TV at the HH level is only 4% lower during summer months
- 90% of P18-24 ad-supported TV viewing, and 87% of P25-34, is done “live” which is on par with the rest of the year

The Summer Solstice For TV Brands: Achieving A High Point Through Multi-screen TV

- The ad-supported multi-screen TV P18+ audience is 12x larger than Facebook, 8x larger than YouTube
- The ad-supported multi-screen TV P18-34 audience is 6x larger than Facebook, 2x larger than YouTube

The Summer Social Scene: Examining TV’s Popularity In Online Conversations

- Ad-supported TV accounted for 67% of the top 10 trending Twitter topics during a 4-week analysis last summer
- 83 ad-supported TV entertainment programs trended vs. 8 pay-TV shows / 3 Netflix shows / 2 YouTube channels

Summer In The Cinema: Delivering Scale Among Younger Audiences

- Summer cinema P18-34 composition (53%) vs. total internet P18-34 composition (29%)
- Cinema’s P18-34 composition is greater than Netflix (49%), Snapchat (47%), Facebook (34%), YouTube (32%)

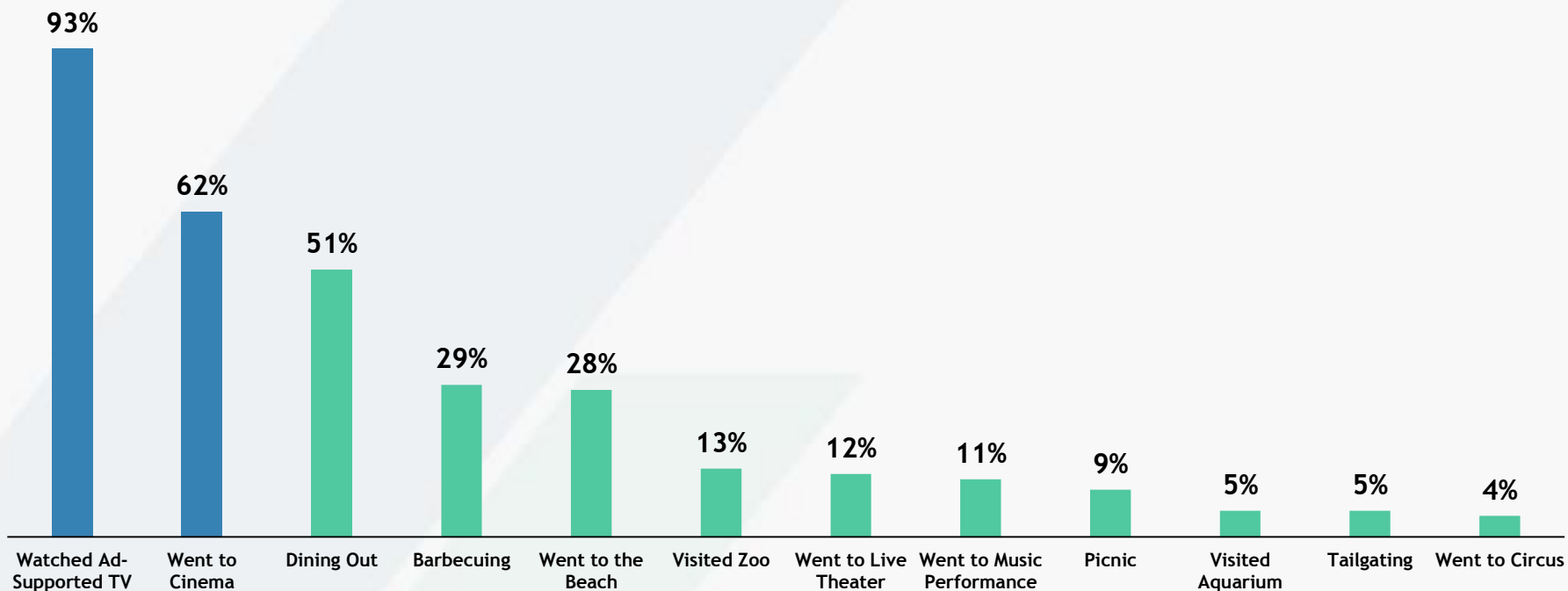


Summer Activities: Understanding Seasonal Behaviors

Watching Ad-Supported TV & Going To The Local Cineplex Are The Two Most Popular Leisure Time Activities

Leisure Activities Participated In Last 12 Months*

P18+



*except for "watched ad-supported TV" which only reflects viewership during summer months

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Source: TV data based on VAB Analysis of Nielsen Npower R+F Time Period Report, P18+, 5/28/17-9/10/17, Live+7; Leisure Activities based on GFK MRI 2017 Doublebase, P18+

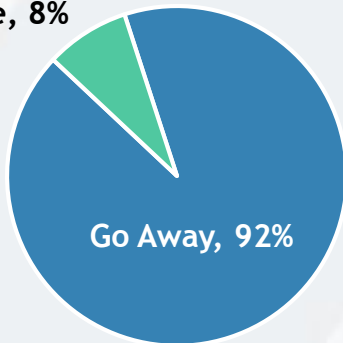
Only About Half Of All Americans Plan To Go Away On A Summer Vacation

Are You Planning To Take A Summer Vacation?

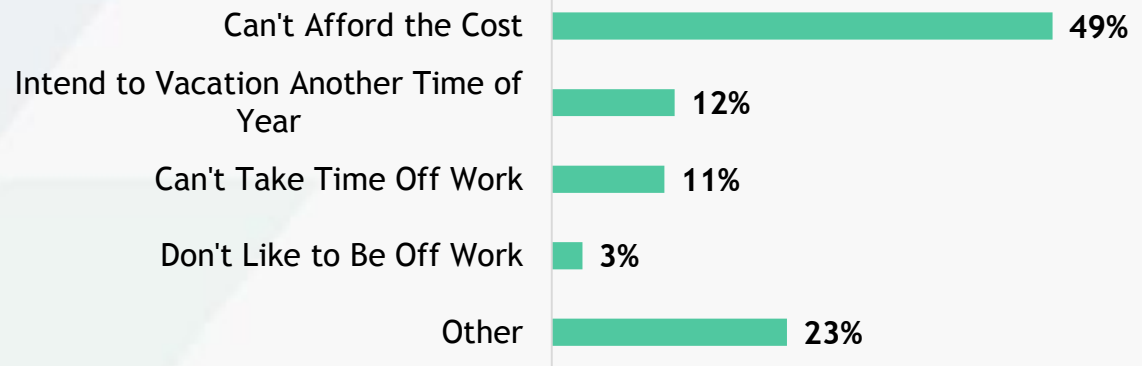


Destination

Stay At Home, 8%



Why Not?



Many people look to TV content as a much more affordable way to escape and relax

- 66% of A18+ believe television is a good escape, while 60% say that TV relaxes them

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Whether On Vacation Or At Home, Summer “Reading” Lists Have Evolved Into Summer “Streaming” Lists

- Thanks to streaming, more video viewing occasions - through both time and locations - have opened up to the consumer and many are streaming more frequently and in spots where they used to read a book during the summer

64% say they are “streaming shows / series in places they used to read”

Inside the home



Relaxing on the porch



Lounging in the yard



On the beach



At a lake

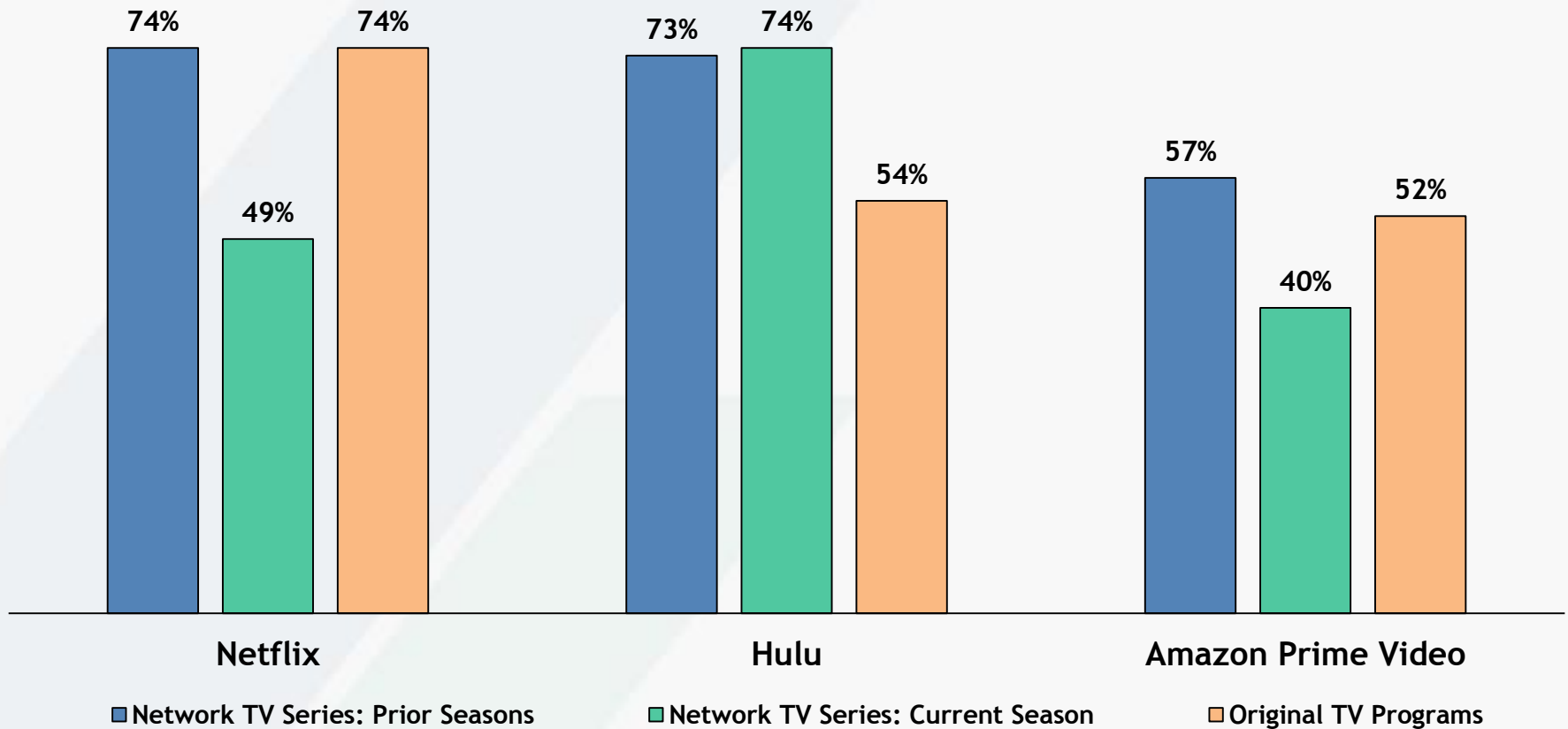


62% say they are “streaming shows / series during times they used to be reading”

- From a platform perspective, 77% of streamers use TV network websites / apps over the summer
- When on vacation, people find streaming an integral part of their time away
 - 90% say that streaming shows gives them a sense of “me-time” where they can relax and decompress from other pressures
 - 75% say they talk more with their family and friends about the shows/series they’re streaming than the books they’re reading
 - 65% say they’re spending more quality time with family/friends because they’re streaming shows together

Network Shows Are The Most Popular TV Content Streamed On All The Major SVOD Services

TV Content Types Viewed on Netflix, Hulu & Amazon Prime Video



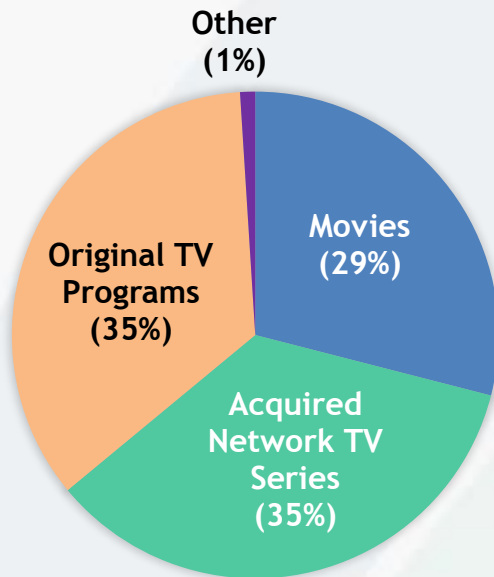
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Source: Kagan, a media research group within the TMT offering of 2018 S&P Global Market Intelligence. Results from an online consumer survey conducted in September 2017, base: Netflix users - 1,480; Hulu users - 549; Amazon Prime Video users - 938. Question: You indicated that you currently have a subscription to (online video service). Which of the following types of video content do you view from the service?

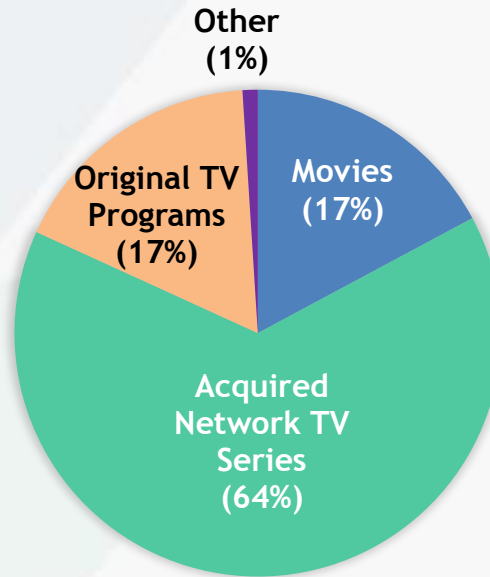
Collectively, Subscribers Also Find Acquired Network TV Series To Be More Enjoyable Than Original Content On These Services

Content Most Enjoyed on Netflix, Hulu and Amazon Prime Video

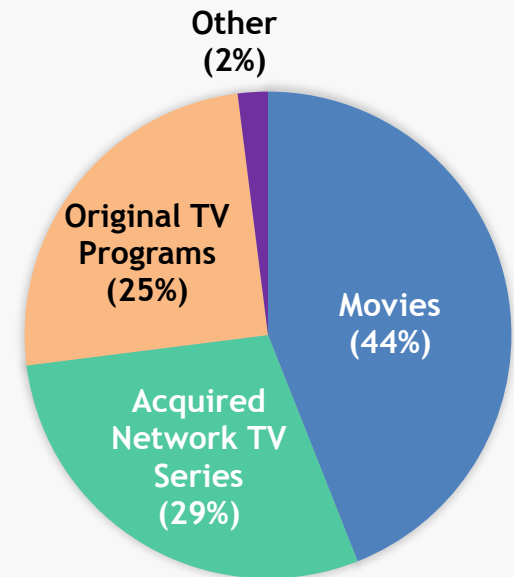
NETFLIX



hulu



amazon prime video

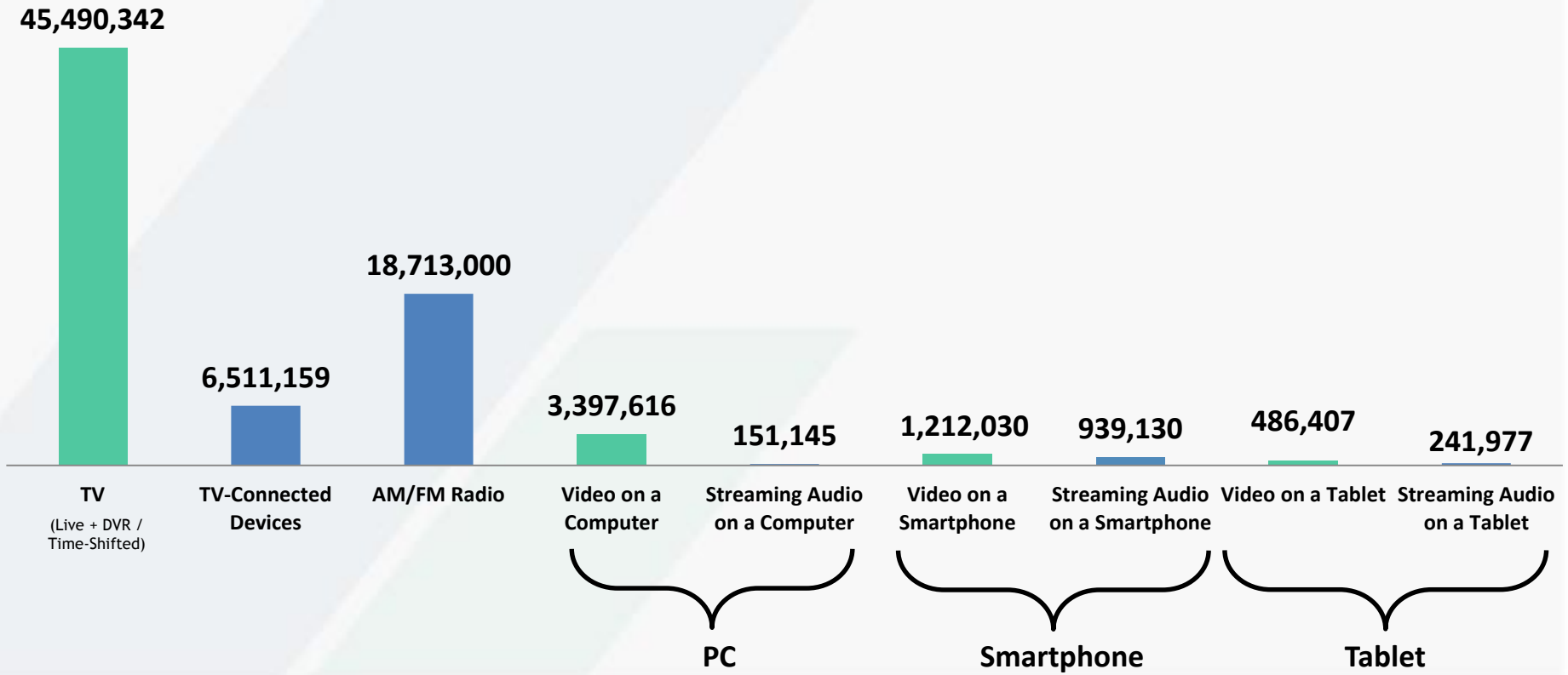


Source: Kagan, a media research group within the TMT offering of 2018 S&P Global Market Intelligence. Results from an online consumer survey conducted in September 2017, base: Netflix users - 1,480; Hulu users - 549; Amazon Prime Video users - 938. Question: Of the content you view on (online video service) which would you say is the content you most enjoy viewing? "Movies" include recent movies (released within past 2 years) and older movies (released over 2 years ago). "Acquired Network TV Series" includes prior seasons of network TV series and current season of network TV episodes.

Even With The Increase In Streaming Across Devices, TV Continues To Represent The Large Majority Of Overall Video Consumption

Average Minute Audience: Adults 18+

2Q '17



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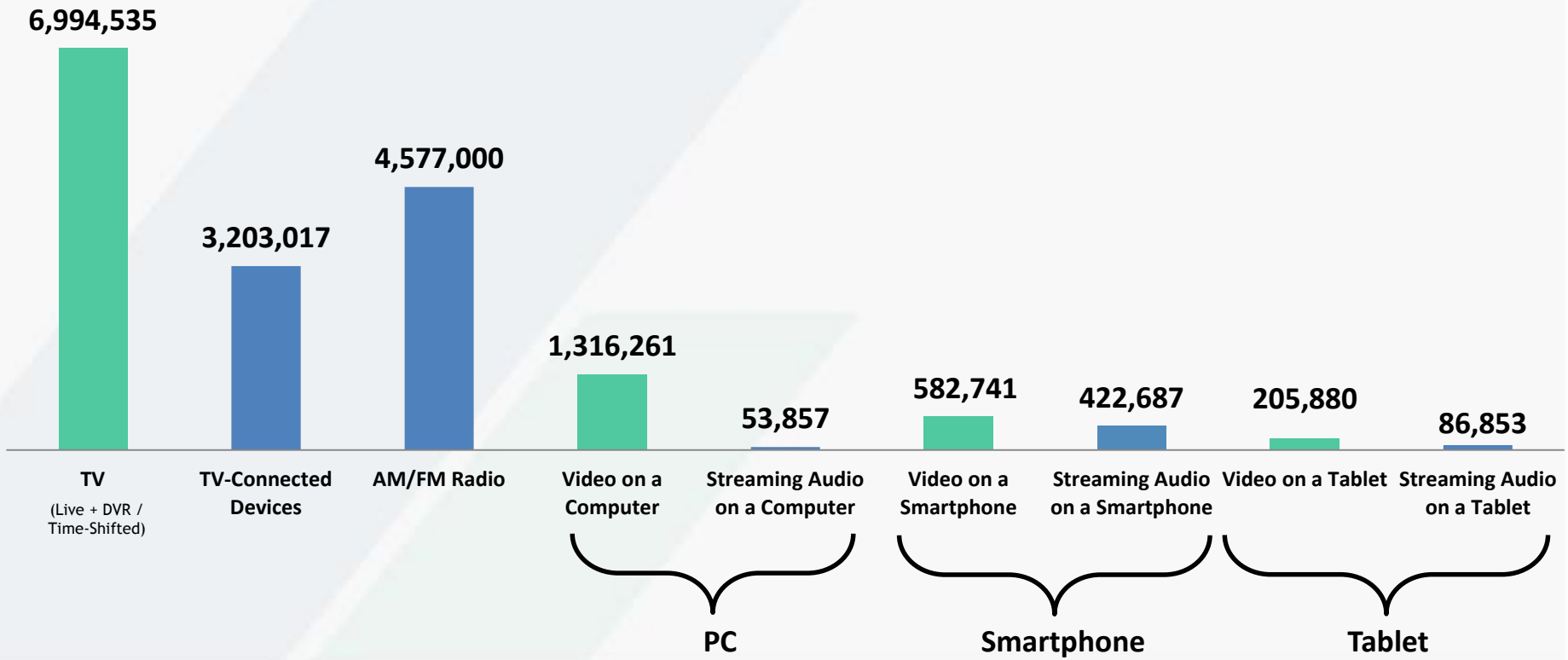
Source: Nielsen Comparable Metrics Report Q2 2017; Data based on average week between March 27, 2017 - June 25, 2017. A18+ UE = 245,740,000.



TV Also Represents The Majority Of Overall Video Consumption Against Millennials As Well

Average Minute Audience: Adults 18-34

2Q '17



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Source: Nielsen Comparable Metrics Report Q2 2017; Data based on average week between March 27, 2017 - June 25, 2017. A18+ UE = 245,740,000.



Summertime TV Programming: Highlighting The Scope Of Content

The Summer Months Feature A Breadth Of Original Programming & Specials Across Ad-Supported TV Brands

77% believe that there's no such thing as "too much" good TV, and 78% say having so many good TV options doesn't stress them out

The collage features a wide variety of TV programming and award specials. The top section includes shows like *Queen of the South*, *Humans*, *Younger*, *bull.*, *Running Wild with Bear Grylls*, *Orville*, *Celebrity Family Feud*, *Somewhere Between*, *Salvation*, *NCIS*, *Blue Bloods*, *NBC News*, *The Big Bang Theory*, *America's Got Talent*, *Little Big Shots*, *Cloak & Dagger*, *100% Code*, *The F Word*, *The Bachelor*, *Code Black*, *American Ninja Warrior*, *Drunk History*, *Shooter*, *Love Connection*, *Beat Shazam*, *abc 20/20*, *Macgyver*, *Boy Band*, *60 Minutes*, *Fun Dungeon*, *RuPaul's Drag Race*, *Mom*, *Let's Make a Deal*, *Great News*, *The Contender*, *Still Star-Crossed*, *World of Dance*, *ABC World News Tonight*, *Marlon*, *Candy Crush*, *Big Brother*, *Battle of the Network Stars*, *So You Think You Can Dance*, *The Wall*, *House Hunters*, *World of Dance*, *Woo*, *Big Brother*, *Summer Donuts*.

The bottom section features award specials with their dates:

- MTV Music Awards** - June 6
- NBA Awards 2018** - June 7-10
- CMA 2018 Test** - June 7-10
- Tony Awards** - June 10
- MTV Movie & TV Awards** - June 18
- BET Awards** - June 22-25
- Macy's 4th of July Fireworks Spectacular** - July 4
- The ESPYS** - July 11
- Teen Choice Awards** - August 12

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Note: Programming above is based on summer 2017 program rankers and are not meant to be reflective of 2018 summer scheduling; some date for specials are tentative. Miner & Co. Studio "Summer of Peak TV" 2016, Base: TV Viewers P18-59.

Original Scripted & Reality Programming Is Complemented By Signature Sports Events Throughout The Summer

NBA



NBA Finals (5/31-7/17)
NBA Draft (6/21)

NFL



NFL Preseason (August)
NFL Season Kick-Off (9/6)

Cycling



Tour De France (7/7-7/29)

Soccer



World Cup (6/14-7/15)
Champions League Final (6/26)
MLS All-Star Game (8/1)

NHL



Stanley Cup Finals (June)

Extreme Sports



Summer X-Games (7/19-22)

Horse Racing



Belmont Stakes (6/9)

Tennis



French Open (5/27-6/10)
Wimbledon (7/2-15)
US Open (8/27-9/9)

Golf



US Women's Open (5/31-6/3)
US Open (6/11-17)
British Open (7/15-22)
PGA Championships (8/9-12)
Fedex Cup Playoffs (8/23-9/23)

NCAA Football



NCAA Football Kick-Off (8/25)

In Addition To Signature Events, Several Sports Offer Continuity Across The Summer Months

Sport	June				July					August				September						
	W1	W2	W3	W4	W1	W2	W3	W4	W5	W1	W2	W3	W4	W1	W2	W3	W4	W5		
NFL										Pre-season				(9/6) NFL Season Kickoff Regular Season						
MLB	(7/16-17) Home Run Derby & All Star Game Regular Season																			
NBA	(6/21) NBA Draft																			
NHL	Finals																			
NCAA Football														(8/25) NCAA Season Kickoff Regular Season						
Golf	(5/31-6/3) US Womens Open				(6/11-17) US Open				(7/15-22) British Open			(8/9-12) PGA Championship								
Soccer	Regular Tour									Cup Playoffs										
	(6/26) UEFA Champions League Final				(7/15) World Cup Final					(8/1) MLS All Star Game										
	MLS Season		World Cup			MLS Season			MLS & Premier League Season											
NASCAR	Regular Season														Chase For The Cup					
Tennis	(5/27-6/10) French Open				(7/2-15) Wimbledon					(8/27-9/9) US Open										
	ATP Tour																			

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Note: Some 2018 dates are tentative

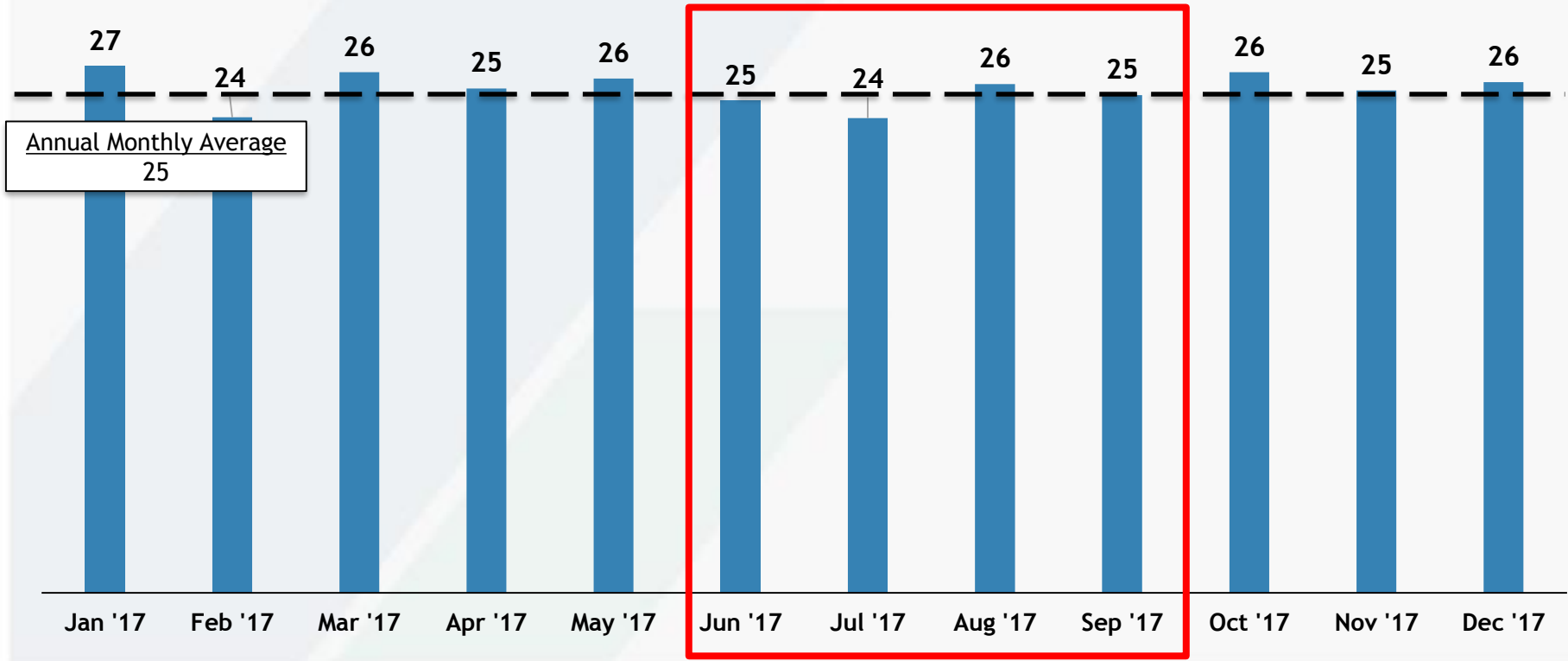




Summer TV Trends: Showcasing Season-long Stability

The Number Of Days That The Average Household Is Tuned Into TV Is Similar For Both Summer & Non-Summer Months

Average # of Days Tuned Into Ad-Supported TV
Households

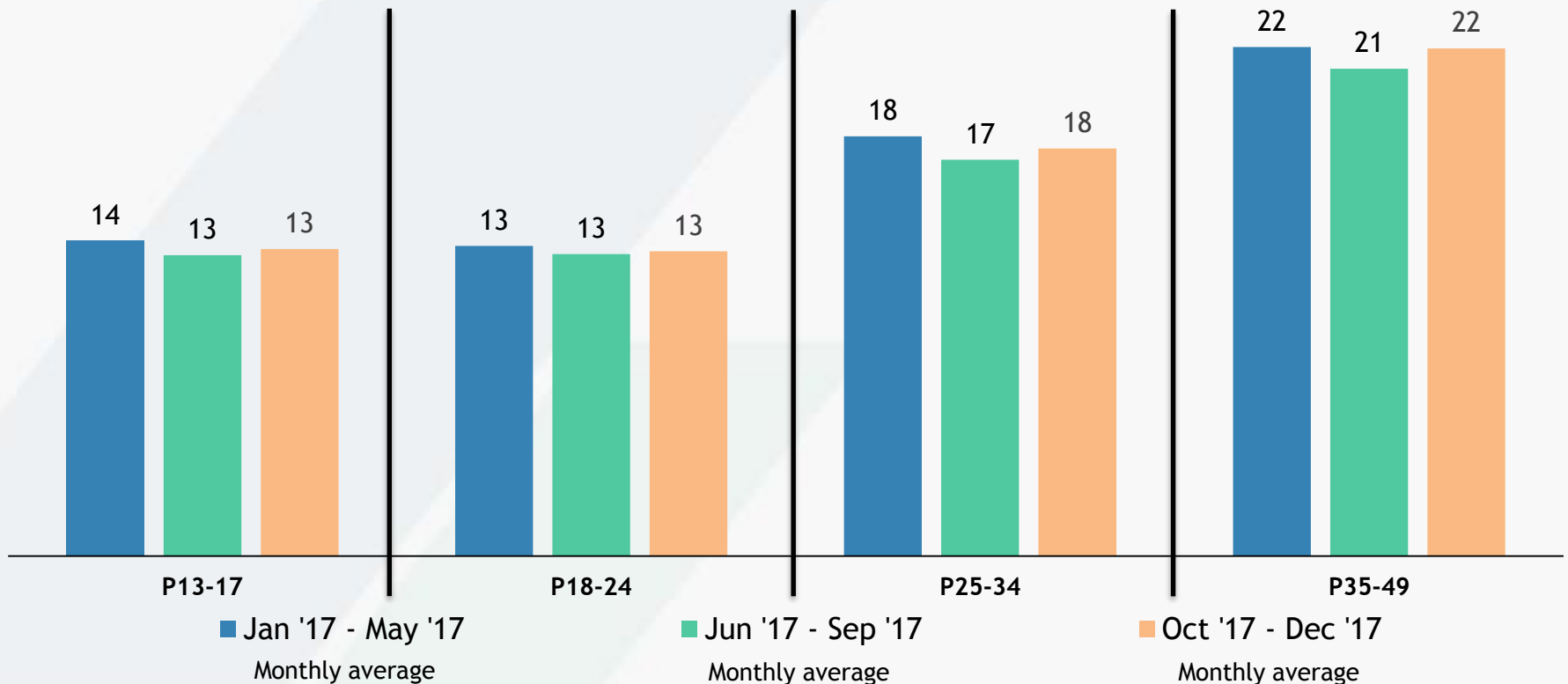


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Source: VAB Analysis of Nielsen Npower Segmentation Report, Household, broadcast + cable TV, based on standard calendar months in 2017, Live+7

The Close Similarity In The Number Of Tune-In Days During Summer & Non-Summer Months Holds True Across Demos

Average # of Days Tuned Into Ad-Supported TV
Based on Monthly Average

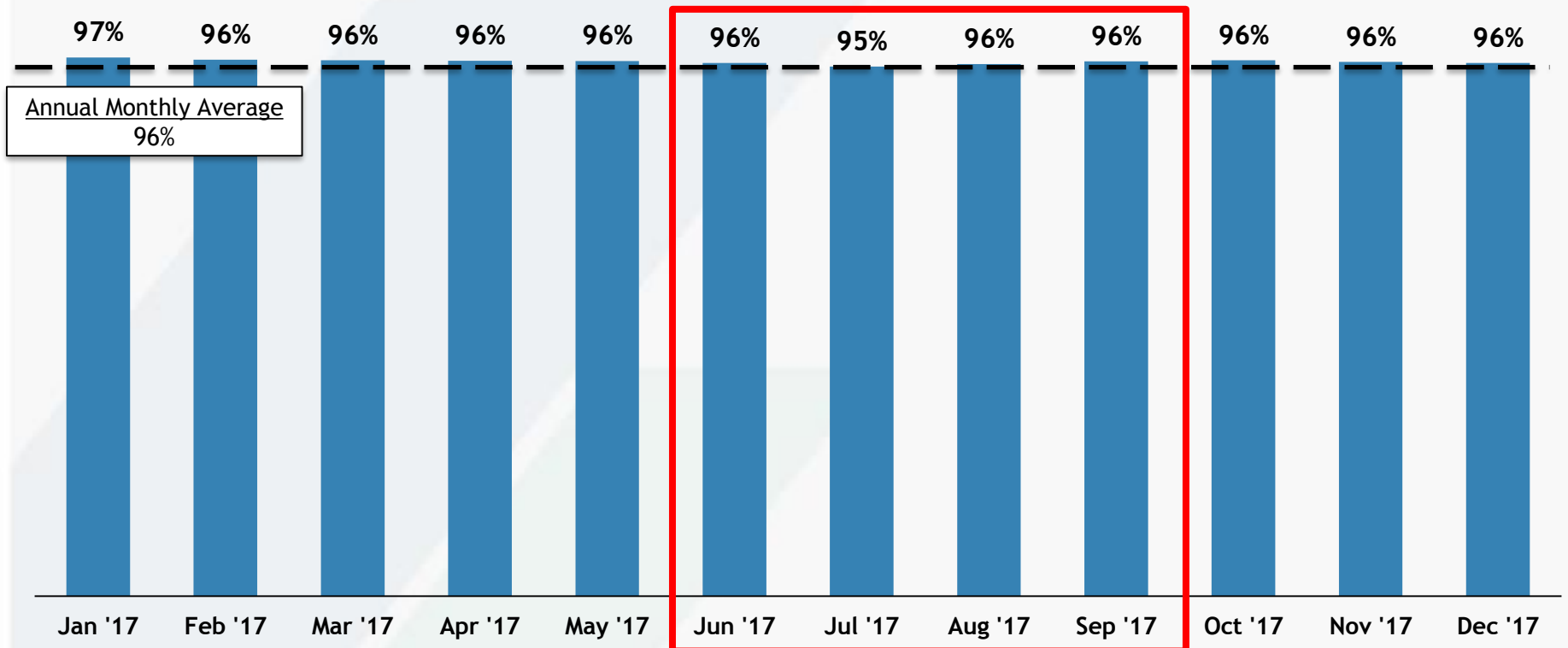


VAB: THE REAL SUMMER GETAWAY

Source: VAB Analysis of Nielsen Npower Segmentation Report, broadcast + cable TV, based on standard calendar months in 2017, Live+7

Monthly Household Reach Remains Steady During Summer Months Compared To Non-Summer Months

Ad-Supported TV Monthly Reach (Total Day) Households



VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen NPower R+F Time Period Report, Household, Total Day, broadcast + cable TV, based on standard calendar months in 2017, Live+7

Monthly Reach Also Holds Relatively Steady Across Demos During Summer & Non-Summer Months

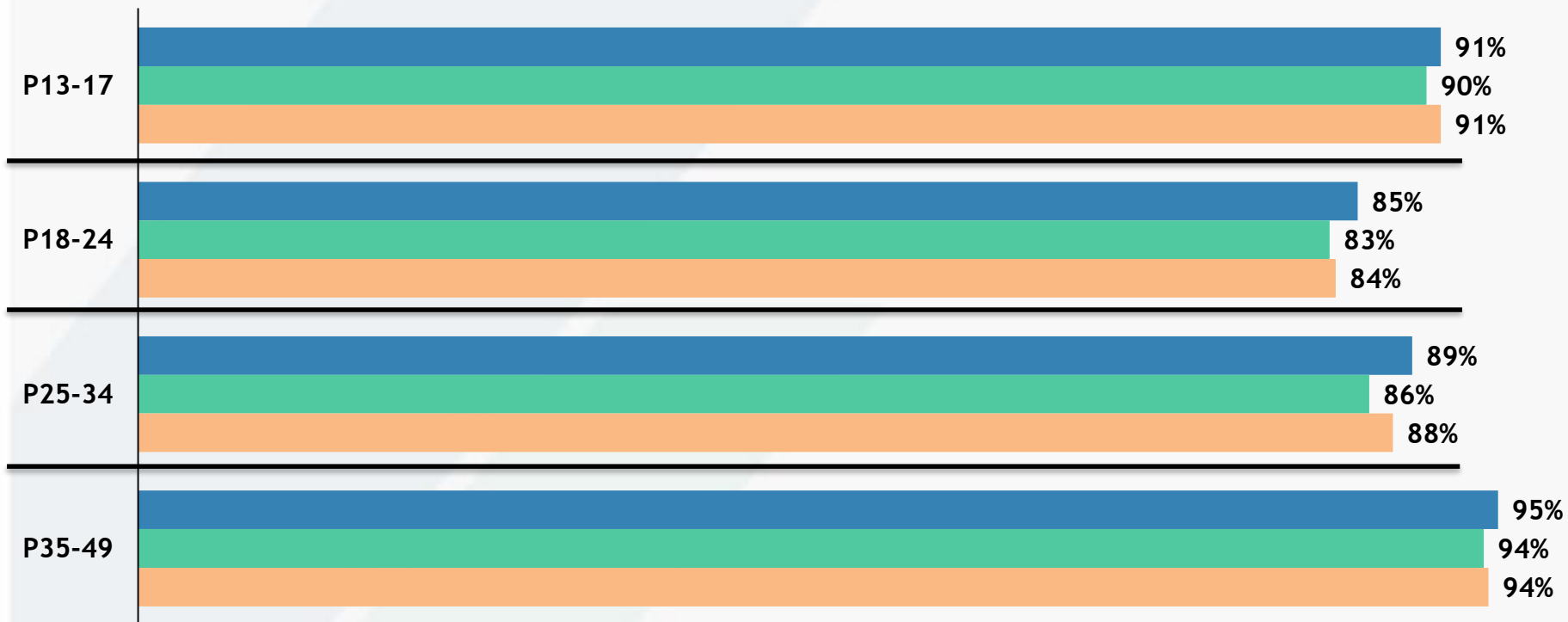
Ad-Supported TV Monthly Reach (Total Day)

Based on Monthly Average

■ Jan '17 - May '17
Monthly average

■ Jun '17 - Sep '17
Monthly average

■ Oct '17 - Dec '17
Monthly average



VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen Npower R+F Time Period Report, Total Day, broadcast + cable TV, based on standard calendar months in 2017, Live+7

Even On Popular Summer Holidays, Daily Reach Is Fairly Comparable To An Average Day Within The Same Month

% Ad-Supported TV Daily Reach (Total Day)
Live+SD

May
(Memorial Day)

July
(July 4th)

September
(Labor Day)

	Memorial Day (Monday)	Other Mondays	Change	July 4 th (Tuesday)	Other Tuesdays	Change	Labor Day (Monday)	Other Mondays	Change
Household	82%	83%	-1%	78%	80%	-2%	82%	83%	-1%
P13-17	43%	40%	+3%	35%	39%	-4%	40%	37%	+3%
P18-24	39%	38%	+1%	35%	36%	-1%	37%	36%	+1%
P25-34	52%	53%	-1%	46%	48%	-2%	51%	53%	-2%
P35-49	70%	69%	+1%	64%	64%	---	69%	70%	-1%

“Other” Day = Average of other weekdays (i.e: Mondays) in the holiday month

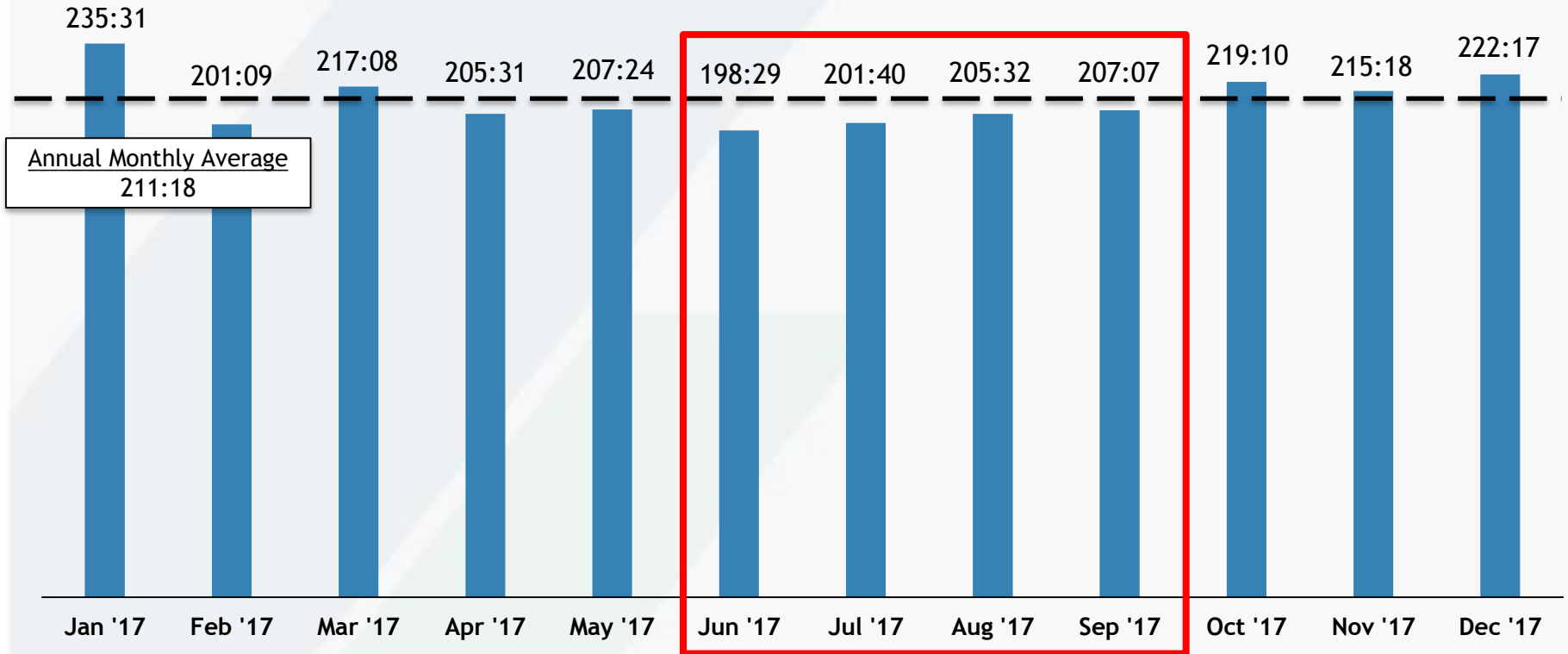
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Source: VAB analysis of Nielsen Npower R+F Time Period Report, Live+SD, Total Day, broadcast + cable TV, based on 2017 dates, Live+SD.



On Average, Monthly Time Spent With Ad-Supported TV At The Household Level Is Only 4% Lower During Summer Months

Ad-Supported TV “Average Monthly Time Spent”
Households - Total Day (Hrs:Mins)



VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen Npower R+F Time Period Report, Total Day, Household, broadcast + cable TV, based on standard calendar months in 2017, Live+7

On A Demo Basis, Monthly Time Spent Is Only 6% Lower On Average During The Summer Vs. Winter Months

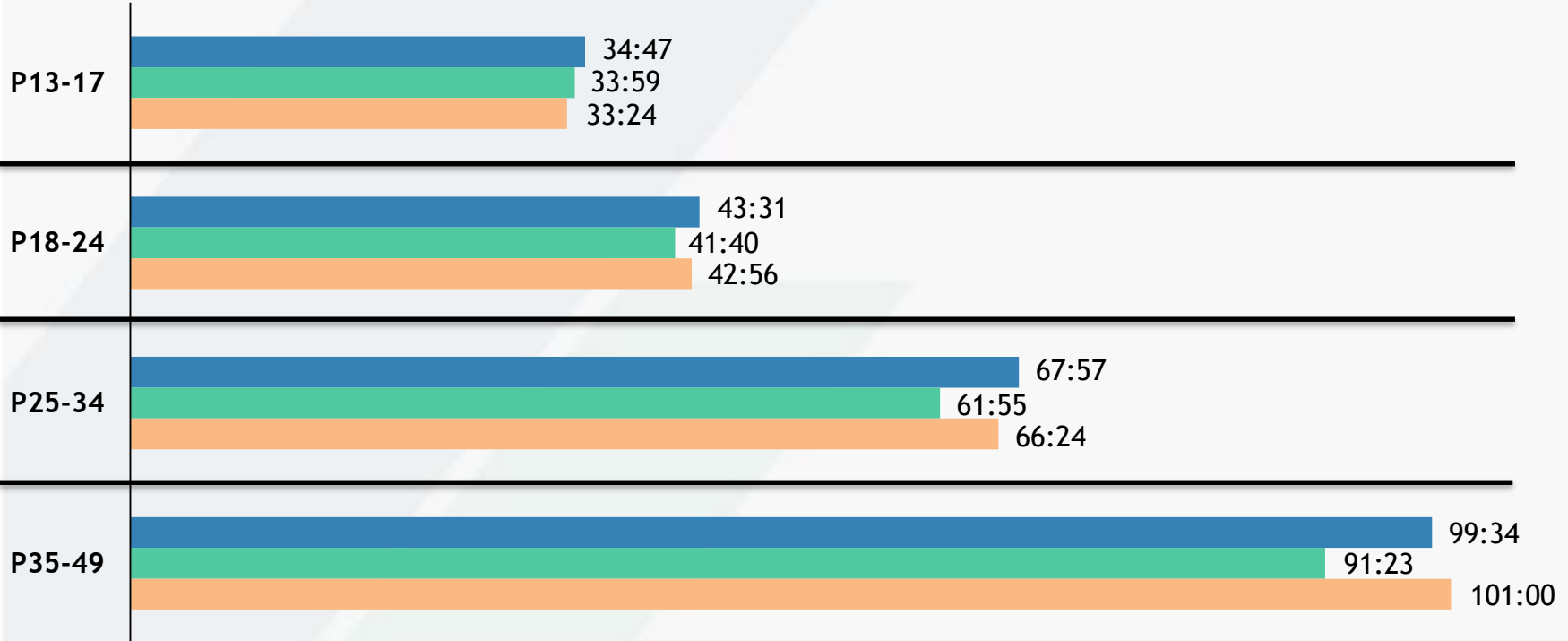
Ad-Supported TV “Average Monthly Time Spent”

Based on Monthly “Total Day” Average (Hrs:Mins)

■ Jan '17 - May '17
Monthly average

■ Jun '17 - Sep '17
Monthly average

■ Oct '17 - Dec '17
Monthly average



VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen Npower R+F Time Period Report, Total Day, broadcast + cable TV, based on standard calendar months in 2017, Live+7

In Most Instances, People Are Watching *More* Ad-Supported TV On Popular Summer Holidays Than On Comparable Days

% Ad-Supported TV Daily Time Spent (Total Day)
Live+SD (Hrs:Mins)

May
(Memorial Day)

July
(July 4th)

September
(Labor Day)

	Memorial Day (Monday)	Other Mondays	Change	July 4 th (Tuesday)	Other Tuesdays	Change	Labor Day (Monday)	Other Mondays	Change
Household	8:13	7:50	+:23	7:57	7:52	+:05	8:26	8:05	+:21
P13-17	2:47	2:22	+:25	2:41	2:51	-:10	2:33	2:18	+:15
P18-24	3:16	3:10	+:06	3:07	3:13	-:06	3:22	3:19	+:03
P25-34	3:54	3:31	+:23	3:34	3:30	+:04	3:57	3:41	+:16
P35-49	4:39	4:11	+:28	4:31	4:09	+:22	4:45	4:19	+:26

“Other” Day = Average of other weekdays (i.e. Mondays) in the holiday month

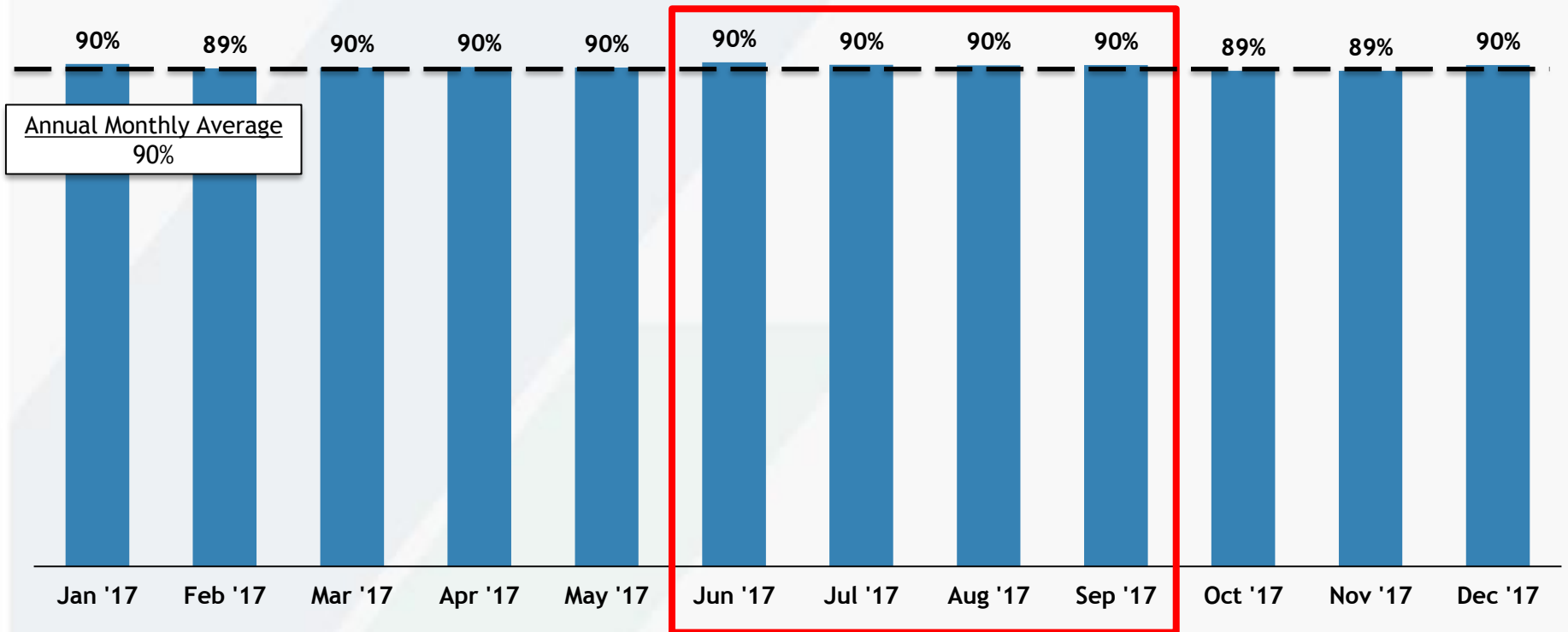
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Source: VAB analysis of Nielsen Npower R+F Time Period Report, Live+SD, Total Day, broadcast + cable TV, based on standard calendar months in 2017, Live+SD.



The Large Majority Of Ad-Supported TV Viewing During The Summer Is Done “Live” & Is On Par With The Rest of The Year

% of Ad-Supported TV Total Viewing Watched “Live”
Household - Total Day

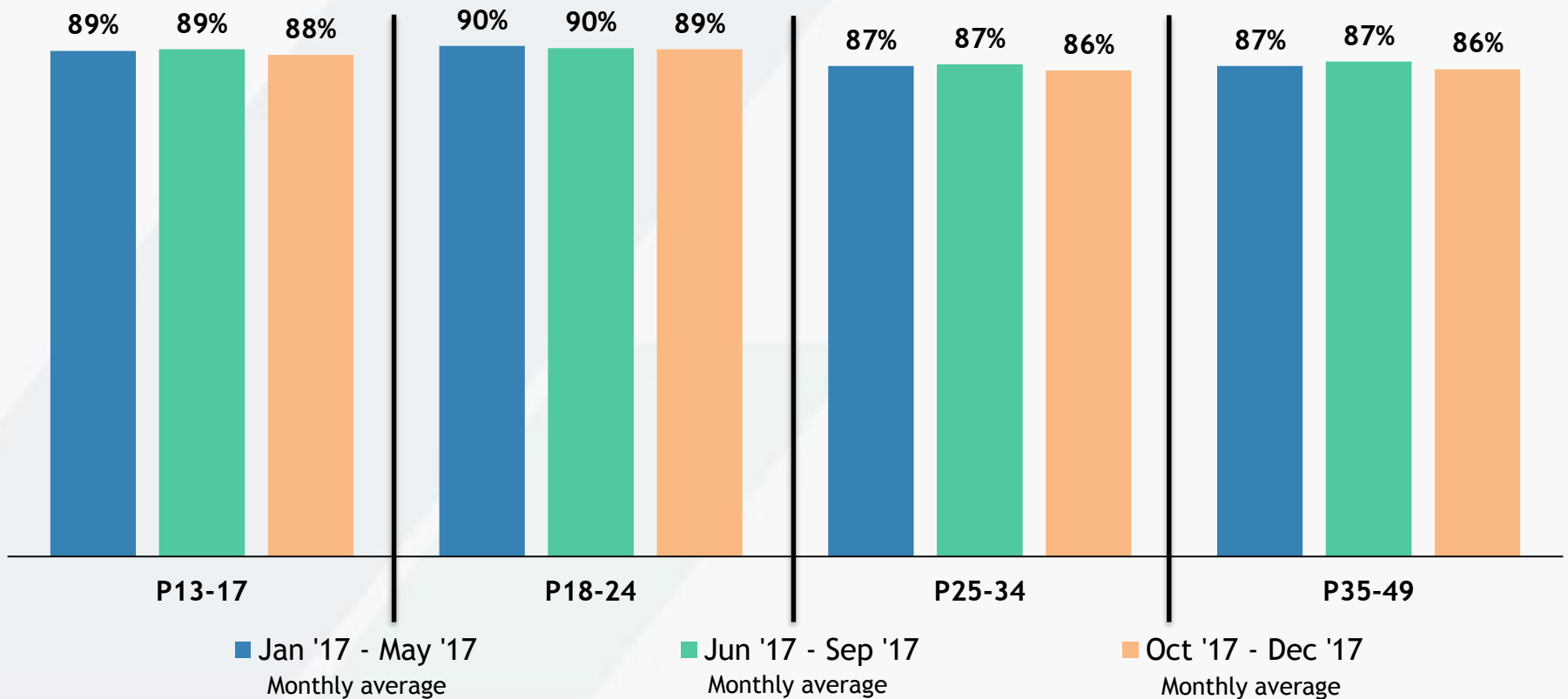


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Source: VAB analysis of Nielsen NPower R+F Time Period Report, all TV Households, Total Day, broadcast + cable TV, based on standard calendar months in 2017, Live & Live+7

“Live” TV Also Represents The Large Majority Of Ad-Supported TV Viewing Across Demos And Is Stable Across The Year

% of Ad-Supported TV Total Viewing Watched “Live”
Based on Monthly “Total Day” Average



VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen Npower R+F Time Period Report, based on TV demo population, Total Day, broadcast + cable TV, based on standard calendar months in 2017, Live & Live+7

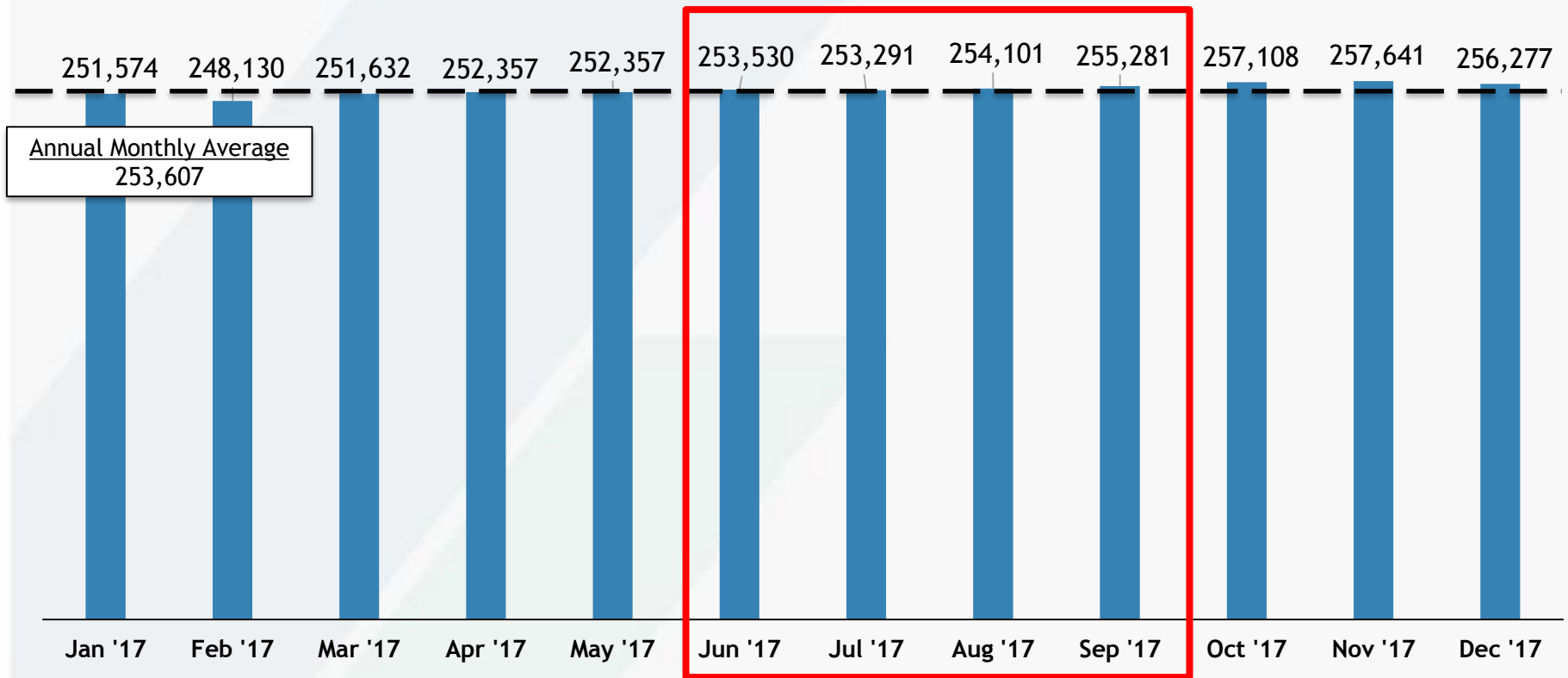


**The Summer Solstice For TV Brands:
Achieving A High Point Through
Multi-screen TV**

TV Brands' Digital Reach Is Nearly Universal Among The Digital Population Throughout The Year, Including Summer

Monthly Unique Reach: Ad-Supported TV Branded Digital Platforms

Total Audience (000)

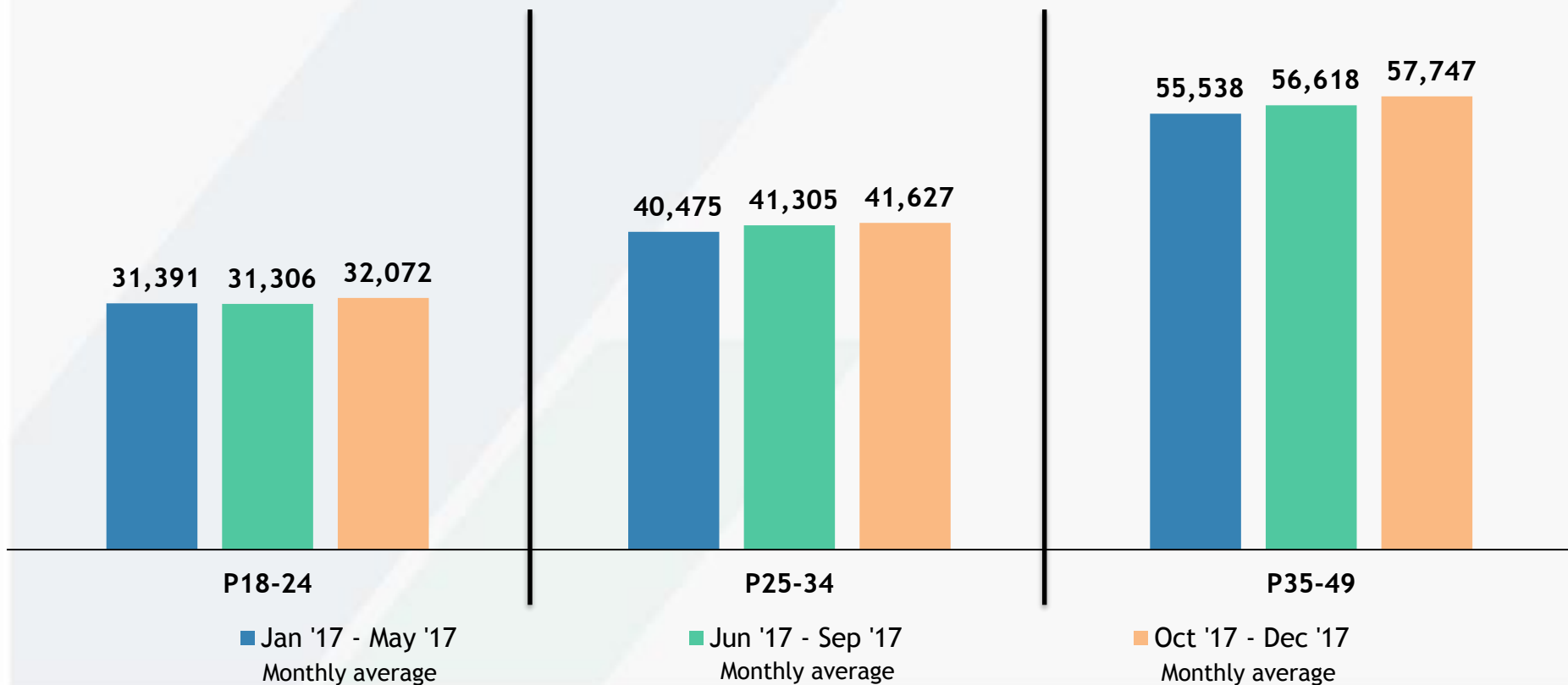


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Source: VAB Analysis of comScore Media Metrix Audience Duplication, Calendar Months, 2017, P2+ (desktop/laptop) / P18+ (mobile), Custom Ad-Supported TV Group, cume unique reach

Regardless Of The Time Period, TV Brands' Digital Reach Is Nearly Universal Across The Major Demos As Well

Monthly Unique Reach: Ad-Supported TV Branded Digital Platforms
Monthly Average (000)

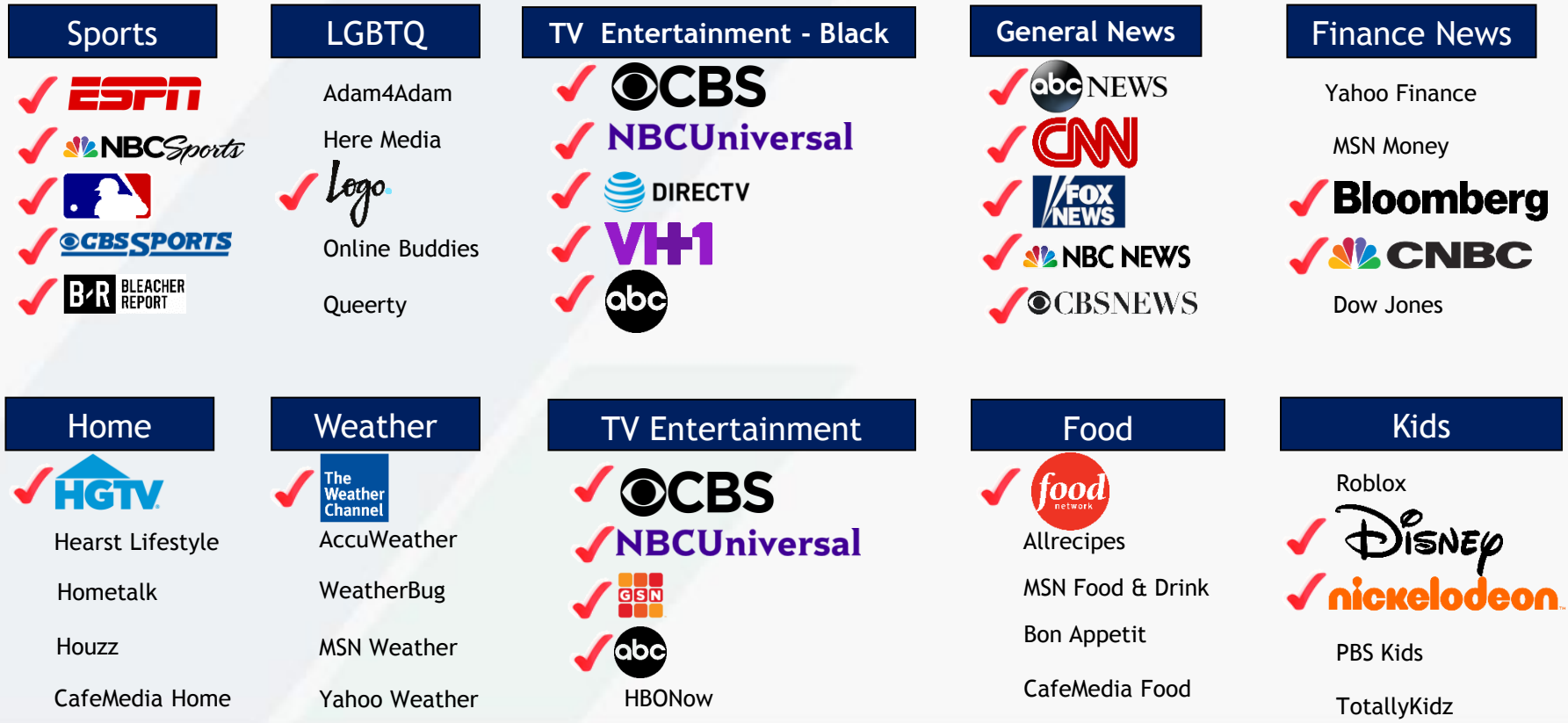


VAB: THE REAL SUMMER GETAWAY

Source: VAB Analysis of comScore Media Metrix Audience Duplication, Calendar Months, 2017, Custom Ad-Supported TV Group, average cume unique reach.

There Is A Thirst For Online TV Content During The Summer As Many Supported TV Brands Rank In The Top 5 Across Most Major Genres

Top 5 Rank by Internet Genre: August 2017 Total Audience



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Source: VAB analysis of Media Metrix multi-platform comScore data, August 2017 (Ranking based on "Total Minutes Viewed"), P2+ (desktop/laptop) / P18+ (mobile)

This Thirst For Online TV Content During The Summer Holds True For Millennials As Well

Top 5 Rank by Internet Genre: August 2017
A18-34

Sports



Comedy



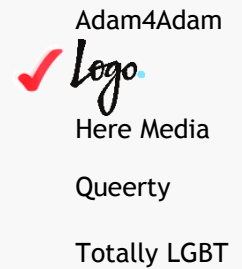
TV Entertainment - Black



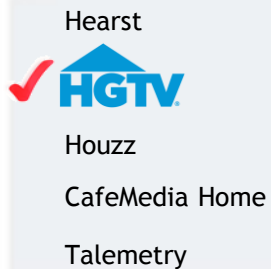
General News



LGBTQ



Home



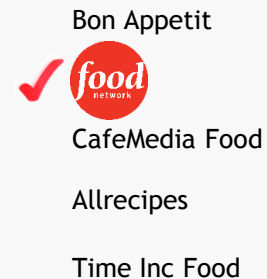
Weather



TV Entertainment



Food



Kids



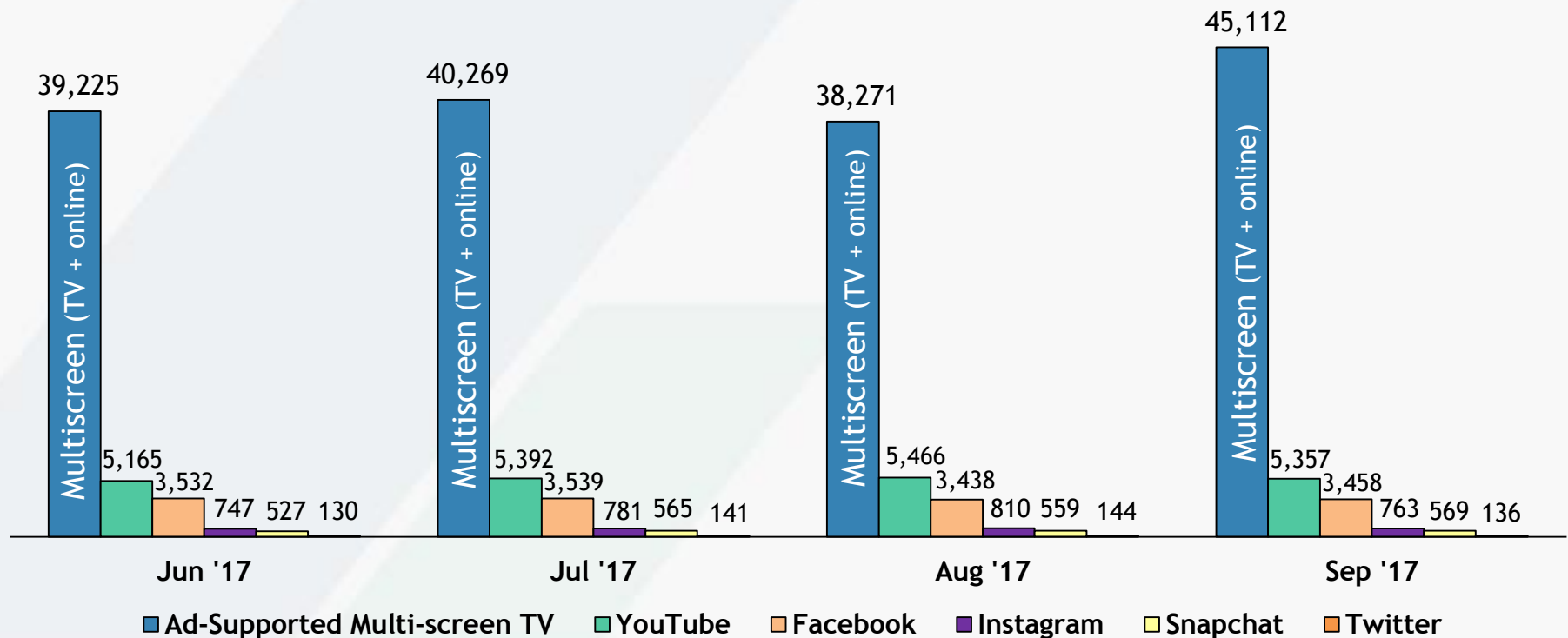
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During The Summer, The Combined Multi-Screen TV Audience Continues To Be Much Larger Than Popular Digital Platforms

On average, in *any given minute*, the ad-supported multi-screen TV P18+ audience is:
12x larger than Facebook & 8x larger than YouTube

Average Minute Audience (000)

P18+

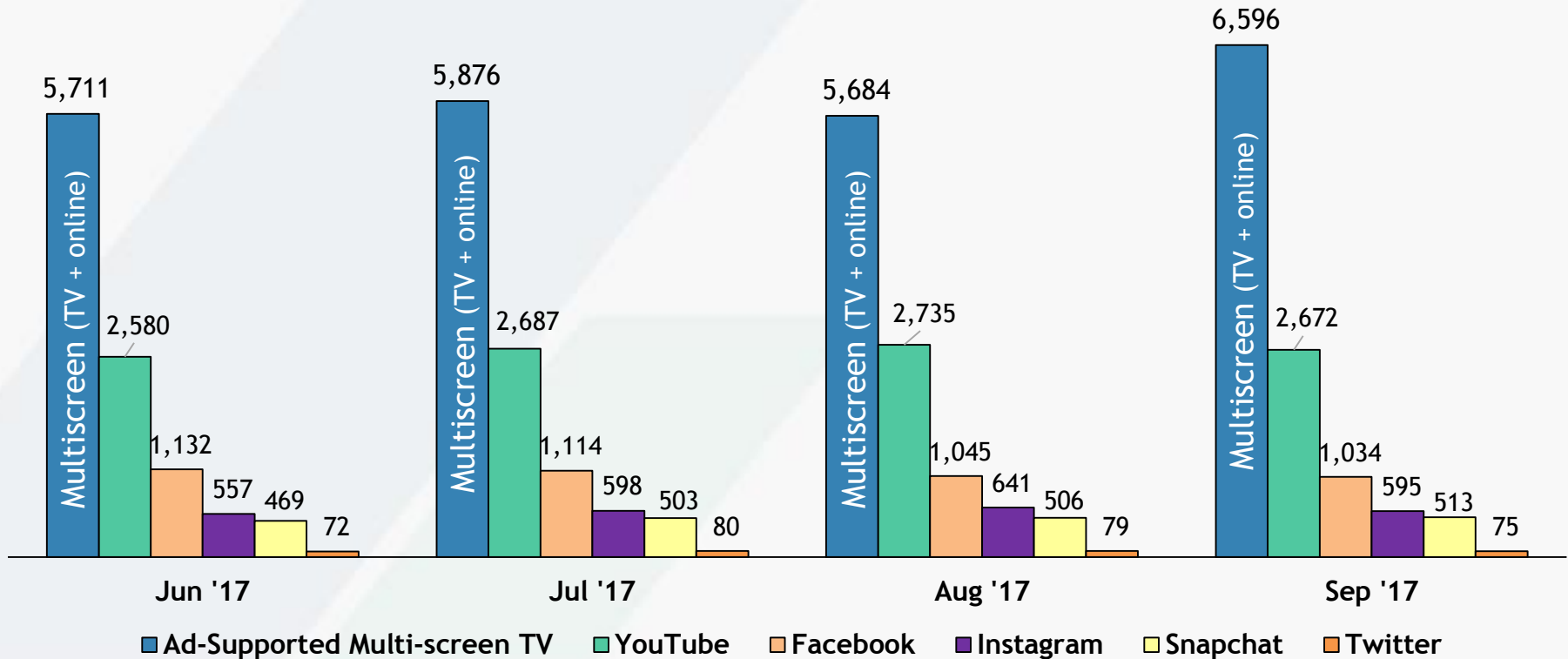


Source: multi-screen TV data based on VAB Analysis of Nielsen Npower R+F Time Period Report, 2017, P18+, Live+7, includes all ad-supported TV viewing sources & VAB analysis of comScore audience duplication, P18+, 2017 data (mediamatrix, multiplatform). Ad-Supported Television Brands represents all measured Ad-Supported Cable nets, Broadcast Television and MVPDs. Digital platform data: comScore Media Trend, P18+, 2017 except for YouTube data which is based on VAB analysis of comScore Video Metrix, 2017, P18+.

Against Millennials, The Multi-Screen TV Audience Is Also Much Larger Than Popular Digital Platforms During The Summer

On average, in *any given minute*, the ad-supported multi-screen TV P18-34 audience is: **6x** larger than Facebook & over **2x** larger than YouTube

Average Audience (000)
P18-34



Source: multi-screen TV data based on VAB Analysis of Nielsen Npower R+F Time Period Report, 2017, P18-34, Live+7, includes all ad-supported TV viewing sources & VAB analysis of comScore audience duplication, P18-34, 2017 data (mediamatrix, multiplatform). Ad-Supported Television Brands represents all measured Ad-Supported Cable nets, Broadcast Television and MVPDs. Digital platform data: comScore Media Trend, P18-34, 2017 except for YouTube data which is based on VAB analysis of comScore Video Metrix, 2017, P18-34.



The Summer Social Scene: Examining TV's Popularity In Online Conversations

Nothing Gets People Talking Online Like Ad-Supported TV; It's The Most Popular Type Of Trending Topic During The Summer

Ad-Supported TV accounted for Nearly 7 Of The Top 10 trending Twitter topics through a four-week primetime period in early summer last year (May '17 / June '17)

67%

Overall Total % of TV-topics
in Top 10 During Primetime

Although this analysis was conducted as the summer season was getting underway between May-June, ad-supported TV continued to dominate the top social conversations on Twitter

8:30p

Total % of
TV-topics In
Top 10: 50%

9:30p

Total % of
TV-topics In
Top 10: 70%

10:30p

Total % of
TV-topics In
Top 10: 76%

11:30p

Total % of
TV-topics In
Top 10: 72%

VAB: THE REAL SUMMER GETAWAY

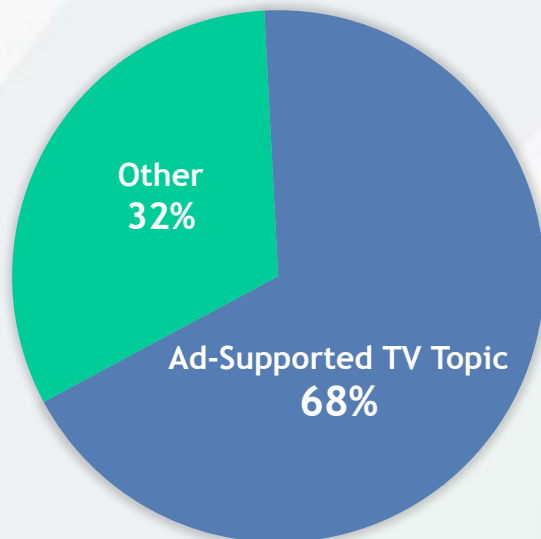
Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) aggregated during 4-week time period (5/15/2017 - 6/11/2017). Results include both "direct" and "related" TV topics.

There Was Virtually No Difference In TV's Social Popularity Between May And The Post Memorial Day Time Period

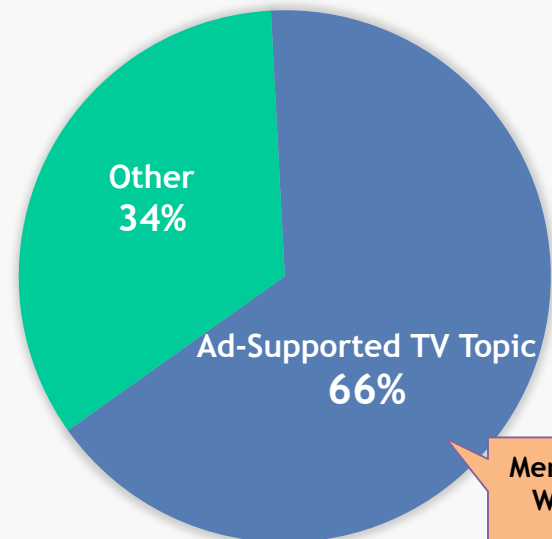
TV-related topics dominated social conversations both before and after the first summer holiday; Television even held a majority of the top trending topics during Memorial Day Weekend itself

Topic Breakout: Overall Total % of Top 10 Trending Twitter Topics

May - Pre-Memorial Day Weekend
(May 15th - May 25th)



Memorial Day Weekend - June
(May 26th - June 11th)



Memorial Day Weekend:
58%

VAB: THE REAL SUMMER GETAWAY

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (5/15/2017 - 6/11/2017). Pre-Memorial Day Weekend = 5/15 - 5/25; Memorial Day Weekend & Beyond = 5/26 - 6/11; Memorial Day Weekend = Friday, 5/26 - Monday, 5/29. Results include both "direct" and "related" TV topics.

Overall, At Least Half Of The Top 10 Trending Topics On *Any Summer Night* Were Based on Ad-Supported TV Content

Four Week Average: % of Top 10 Trending Topics That Are Based On TV Content							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Overall	81%	69%	66%	68%	51%	56%	78%
8:30p	65%	48%	40%	38%	35%	48%	78%
9:30p	85%	73%	68%	75%	55%	55%	80%
10:30p	85%	80%	80%	80%	58%	68%	80%
11:30p	88%	75%	78%	78%	58%	55%	73%

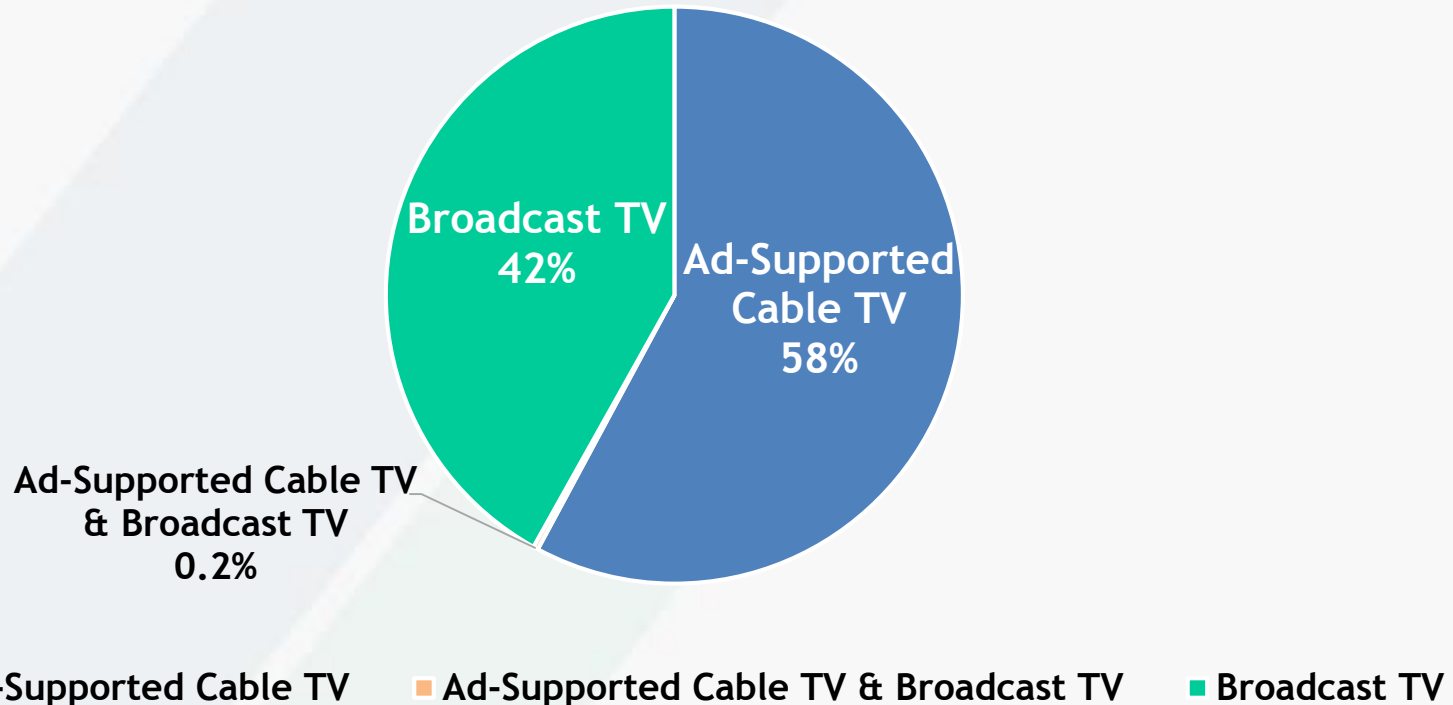
VAB: THE REAL SUMMER GETAWAY

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (5/15/2017 - 6/11/2017). Reflects four week average by day and time. Results include both "direct" and "related" TV topics.

The Majority Of The Top 10 Trending Twitter TV Topics Involved Programming On Ad-Supported Cable TV

Four-Week Time Period

% Breakout of Ad-Supported TV Topics By Medium



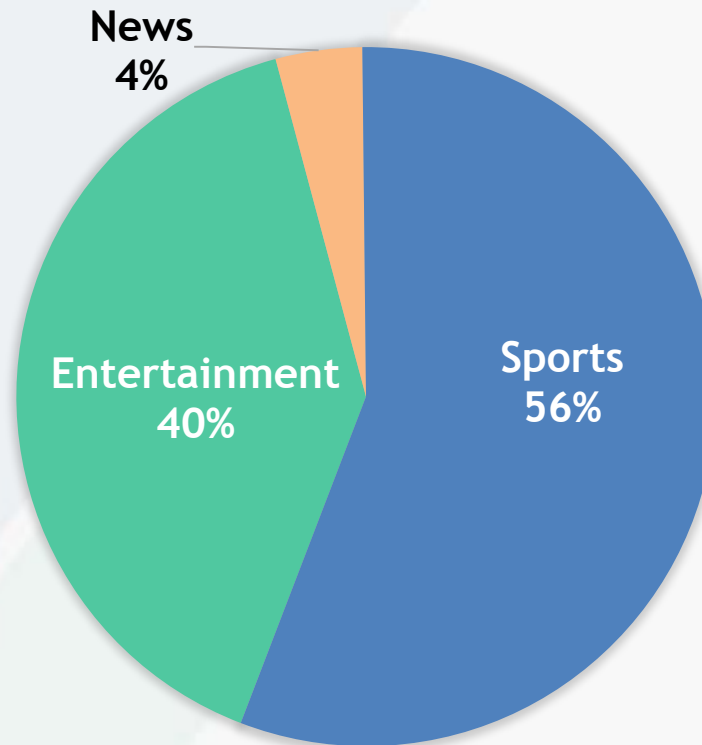
*Ad-Supported Cable TV & Broadcast TV includes programs or topics that aired, or were discussed, on multiple networks such as popular news events (i.e., the Comey testimony) or soccer events.

VAB: THE REAL SUMMER GETAWAY

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) aggregated during 4-week time period (5/15/2017 - 6/11/2017). Results include both "direct" and "related" TV topics.

Sports & Entertainment Both Account For A Large Portion Of The Total Ad-Supported TV Topics That Trended In The Top 10

Four-Week Time Period
Genre % Breakout of Top 10 Ad-Supported TV Trending Topics



VAB: THE REAL SUMMER GETAWAY

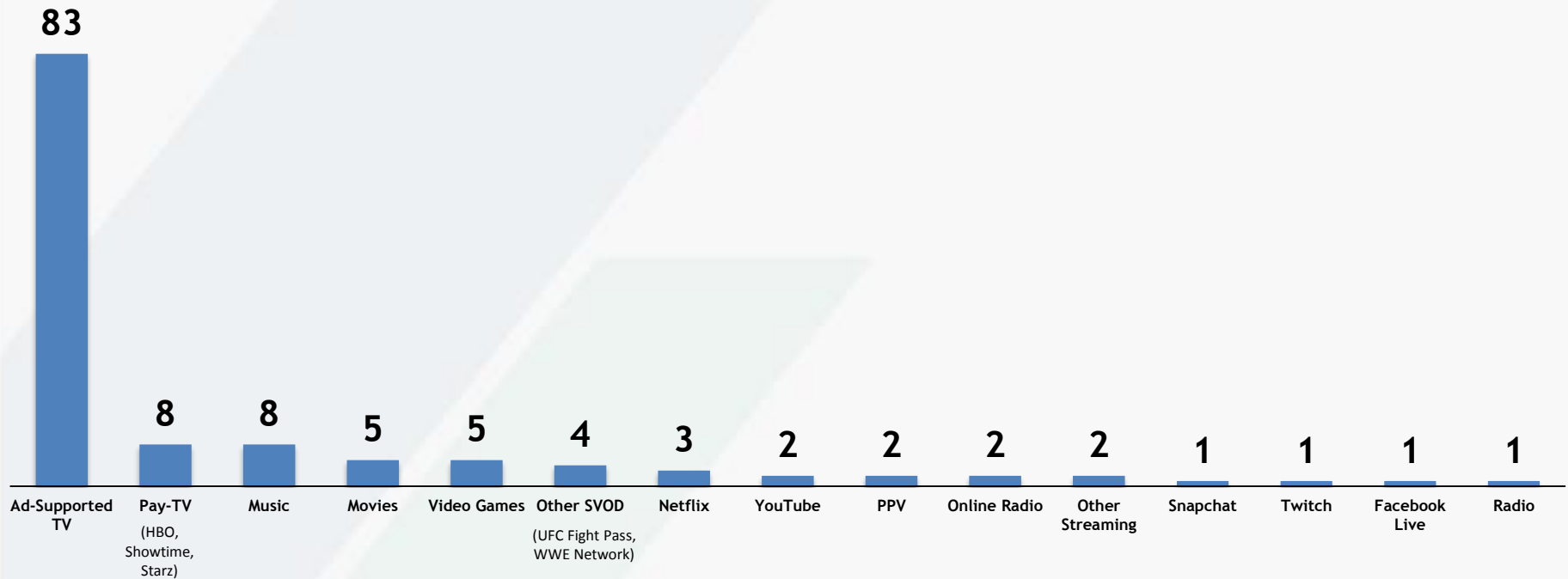
Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) aggregated during 4-week time period (5/15/2017 - 6/11/2017). Results include both "direct" and "related" TV topics.

Ad-Supported TV Owns The Summer Social Space When It Comes To Conversations Around Entertainment Content

Interestingly, two of the three Netflix shows that trended in the Top 10 on Twitter did so because the streaming service announced their cancellation (*The Get Down* & *Sense8*)

Four-Week Time Period

of Top 10 Trending Entertainment Programs / Content By Platform



Other platform “program” highlights: Netflix - House of Cards, Sense8, The Get Down; Music - T-Wayne, Rake It Up; Online Radio - Most Requested Live (iHeart Radio); YouTube - Car Boys; HBO - HBO Boxing, Mommy Dead & Dearest, Real Time with Bill Maher, The Leftovers; Showtime - Twin Peaks; Starz - American Gods; PPV - UFC 212; Facebook Live - CFDA Awards; Snapchat - Ask Ethan & Grayson; WWE Network - WWE Backlash; Video Games - Injustice 2, Life Is Strange 2; Other streaming - E3

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (5/15/2017 - 6/11/2017). Based on unique program counts. For the purposes of this chart, “program / content” is an all-encompassing definition for individual pieces of content on each platform (albums & singles for music, video games, channel on YouTube, live streaming and/or personality on a social media platform, etc).



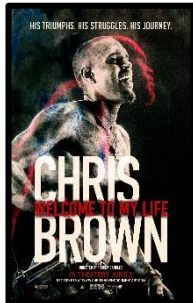
Summer In The Cinema: Delivering Scale Among Younger Audiences

People Can't Wait To Share Their Excitement Online When They Hear About Movie-Related Content & Subjects

Examples of movie topics that trended in the top 10 on Twitter during early summer 2017

Special Premieres

Thurs, June 8th -
Chris Brown:
Welcome To My Life is shown in theatres for one night only



#WelcomeToMyLife trends in the top 10 that night (reaches #6)

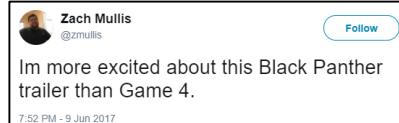
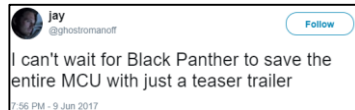


New Trailer Released

Fri, June 9th -
Marvel releases the new trailer for *Black Panther*



Black Panther is #1 trending topic at Twitter during the 10:30p period

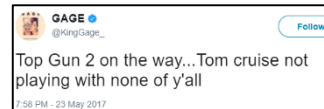
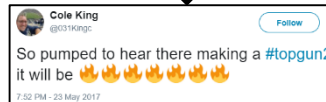


Production Announcements



Tues, May 23rd - Tom Cruise tells an Australian talk show that *Top Gun 2* will be filming in the next year.

Top Gun 2 trends in the top 10 throughout the night (reaches #4)

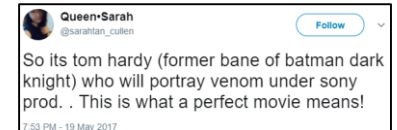
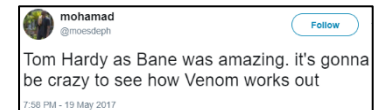


Cast & Crew Announcements

Fri, May 19th -
Tom Hardy announced as Venom in a new Spiderman spinoff movie



Tom Hardy trends in the top 10 that night (reaches #6)

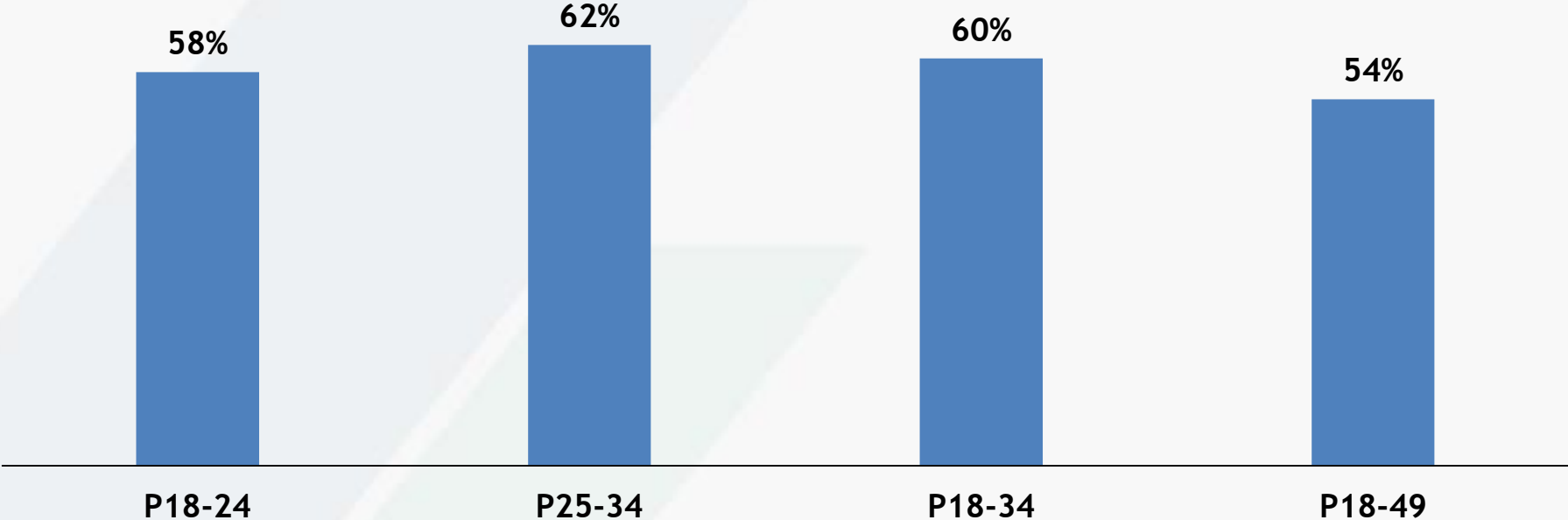


VAB: THE REAL SUMMER GETAWAY

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (5/15/2017 - 6/11/2017).

Cinema Delivers High Reach In Key Demographics During The Summer

Cinema Reach During Summer Months (2017)
(000)



VAB: THE REAL SUMMER GETAWAY

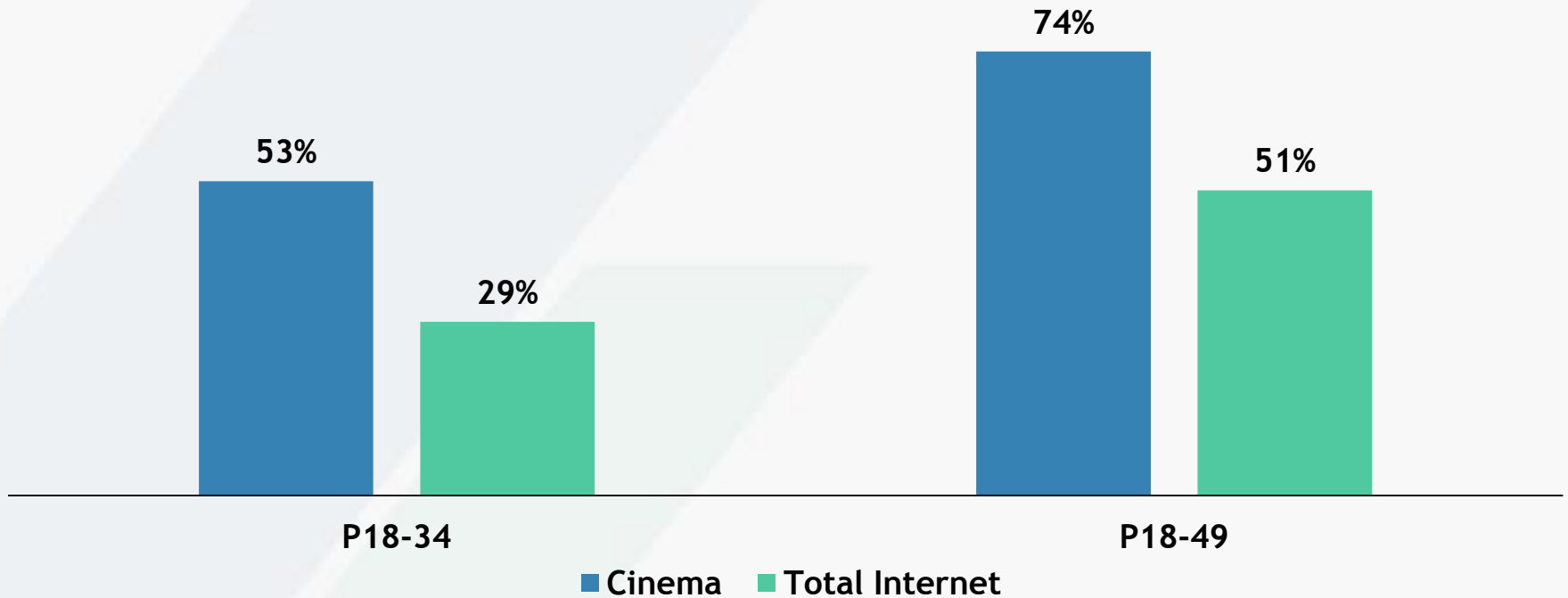
Source: VAB Analysis of Nielsen Media Impact, Cinema = NCM & Screenvision, 5/28/17-9/10/17. Reach vs. demo population.



In Addition To The Reach Provided By TV, Look No Farther Than The Local Cineplex To Find Millennials During The Summer

Cinema has a much higher composition of Millennials than digital platforms

Summer Audience Composition Cinema vs. Total Internet (July)



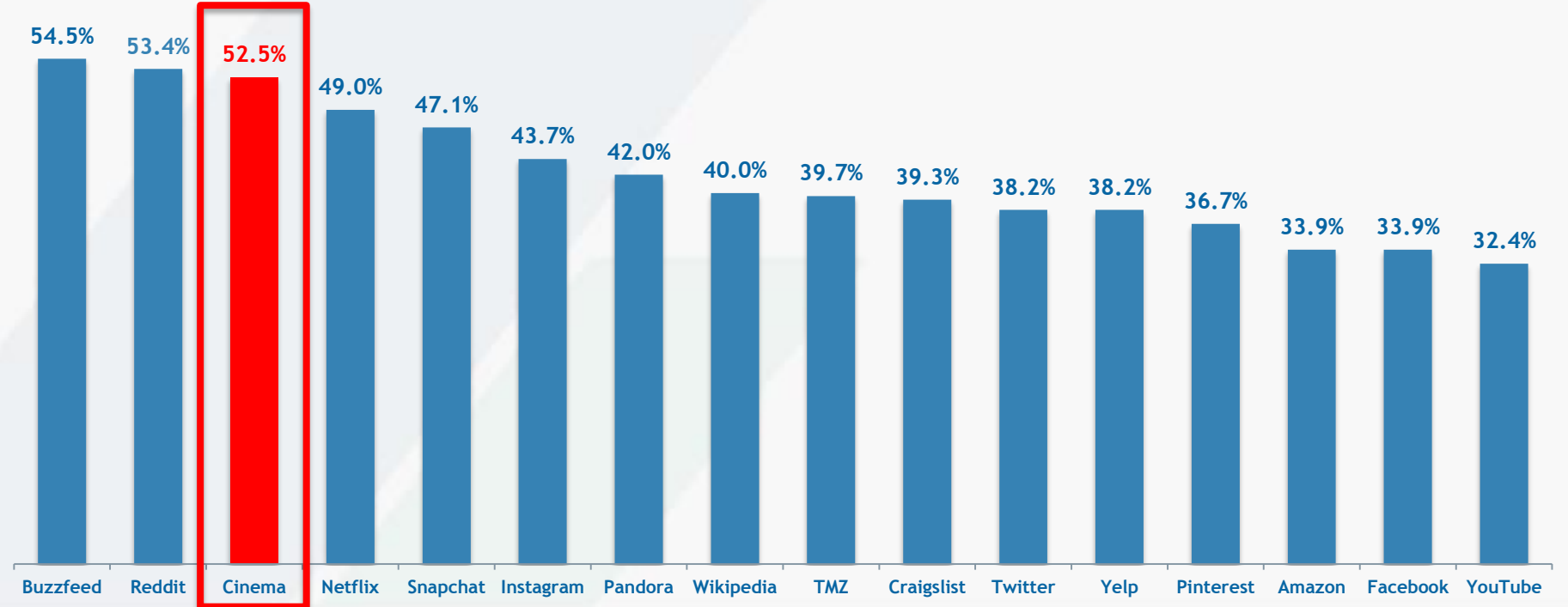
VAB: THE REAL SUMMER GETAWAY

Source: Nielsen Cinema Audience Report, July 2017 for cinema audience composition. VAB Analysis of comScore July 2017, Media Trend Multiplatform for Total Internet based on unique visitors. Composition for both cinema and digital based on P2+.

Cinema Provides Both Scale & High Concentration Of Millennials In Comparison To The Most Popular & Targeted Digital Platforms

P18-34 Audience Composition

Cinema vs. Select Digital Platforms (25MM+ P18-34 UVs)



VAB: THE REAL SUMMER GETAWAY

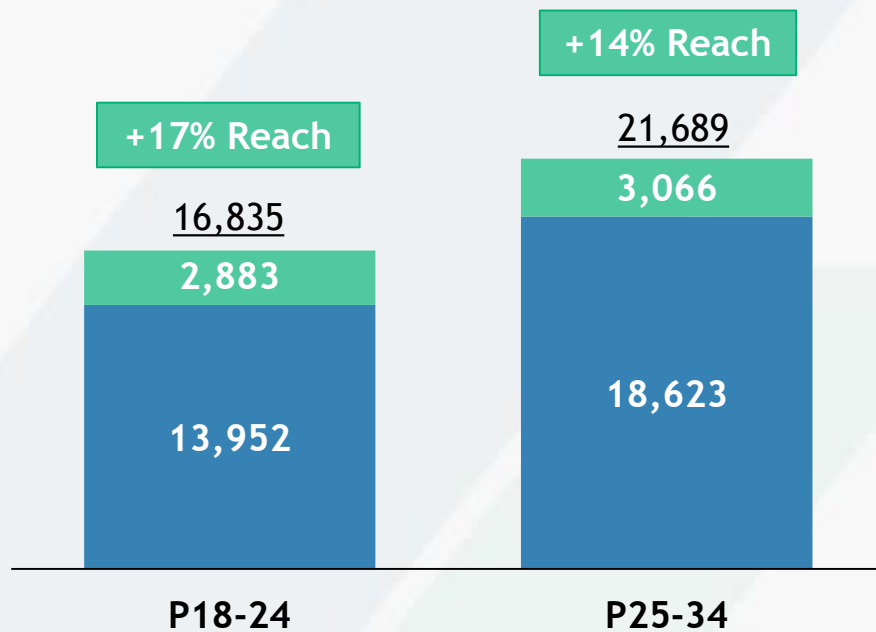
Source: Nielsen Media Impact, July 2017 for unique cinema reach P18-34 (25MM+); Nielsen Cinema Audience Report, July 2017 for cinema audience composition. comScore July 2017, mediameatrx multiplatform for we domains (excluding Snapchat which was pulled at the property level). P18-34 composition for both cinema and digital based on total measured audience of each platform.



Against Millennials, Cinema Has The Ability To Add Double-Digit Reach To Television During The Summer

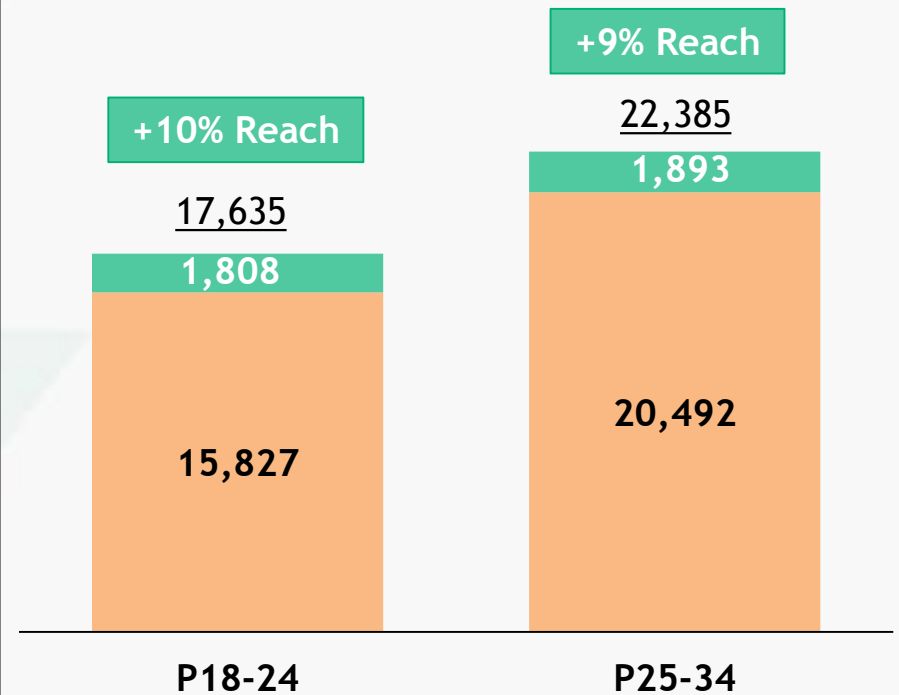
Summer Total Reach
(000)

■ Broadcast Prime ■ Cinema



Summer Total Reach
(000)

■ Broadcast & Cable Prime ■ Cinema



VAB: THE REAL SUMMER GETAWAY

Source: VAB Analysis of Nielsen Media Impact 5/28/17 - 9/10/17; Cinema includes NCM & Screenvision; P18-24, P25-34.

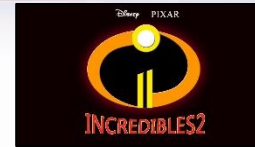
Big Theatrical Releases Are Slated Throughout Summer 2018 Featuring Top Stars & Popular Franchises



May 25



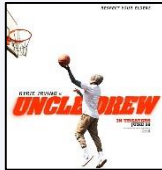
June 8



June 15



June 22



June 29



June 29



July 4



July 6



July 13



July 20



July 27



August 3

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Note: Some release dates are tentative

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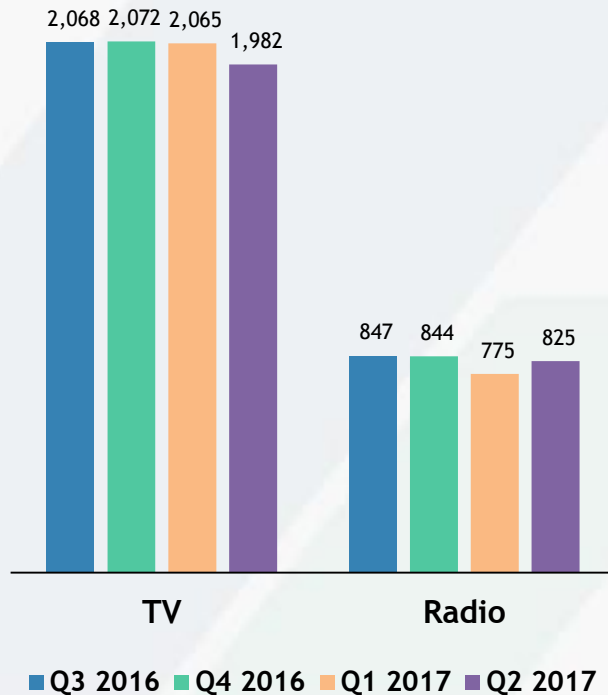
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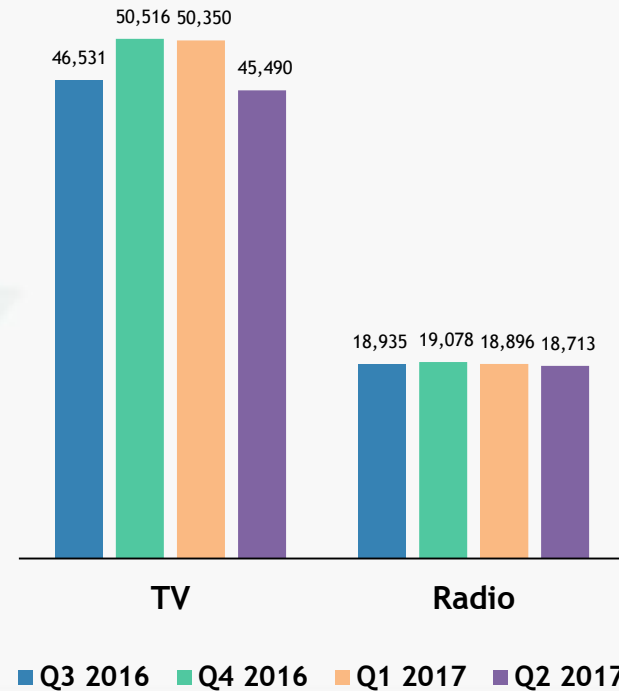
No platform drives business like
TV's premium video-at-scale

Time Spent With Radio Is Relatively Flat During The Summer Months And Continues To Be Dwarfed By Television

Weekly Mins Per User
P18+



Average Minute P18+ Audience
(000)

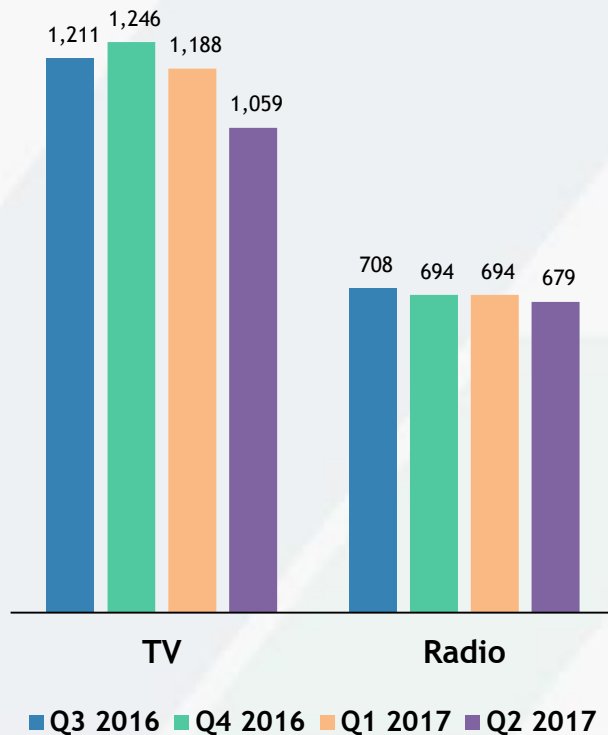


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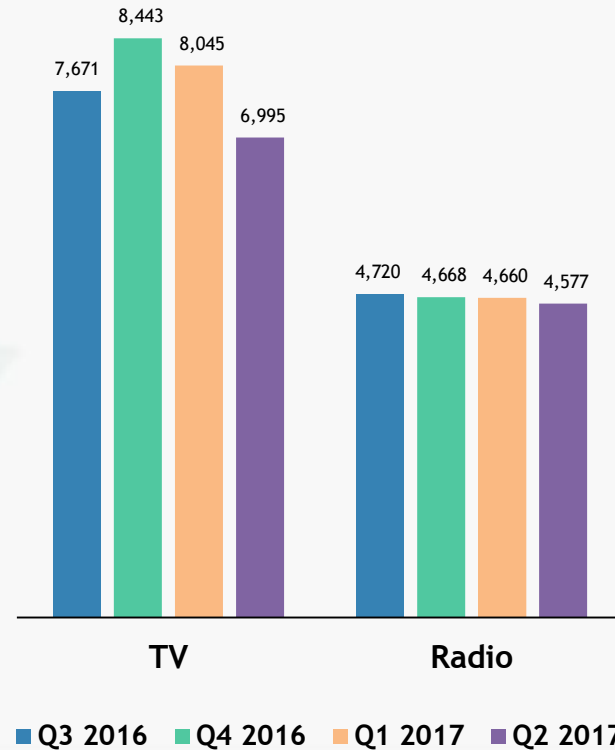
Source: VAB Analysis of Nielsen Comparable Metrics Report, P18+. TV reflects Live + DVR/Timeshifted; Radio reflects AM/FM terrestrial radio.

Time Spent With Radio By Millennials Is Also Relatively Flat During The Summer Months And Is Dwarfed By Television

Weekly Mins Per Adult User
P18-34



Average Minute P18-34 Audience
(000)

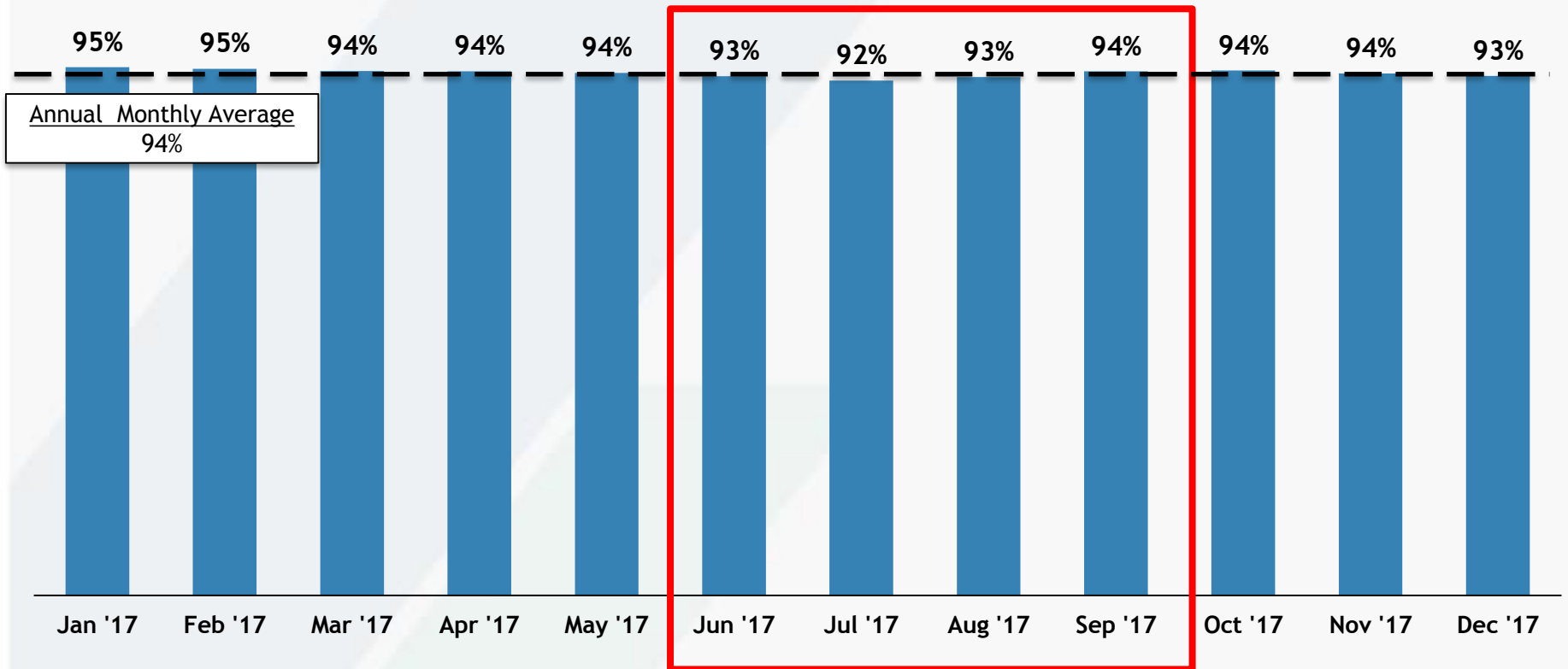


VAB: THE REAL SUMMER GETAWAY

Source: VAB Analysis of Nielsen Comparable Metrics Report, P18-34. TV reflects Live + DVR/Timeshifted; Radio reflects AM/FM terrestrial radio.

Much Like Total Day, Monthly Household Primetime Reach Remains Steady During Summer Months

Ad-Supported TV Monthly Reach (Primetime)
Households



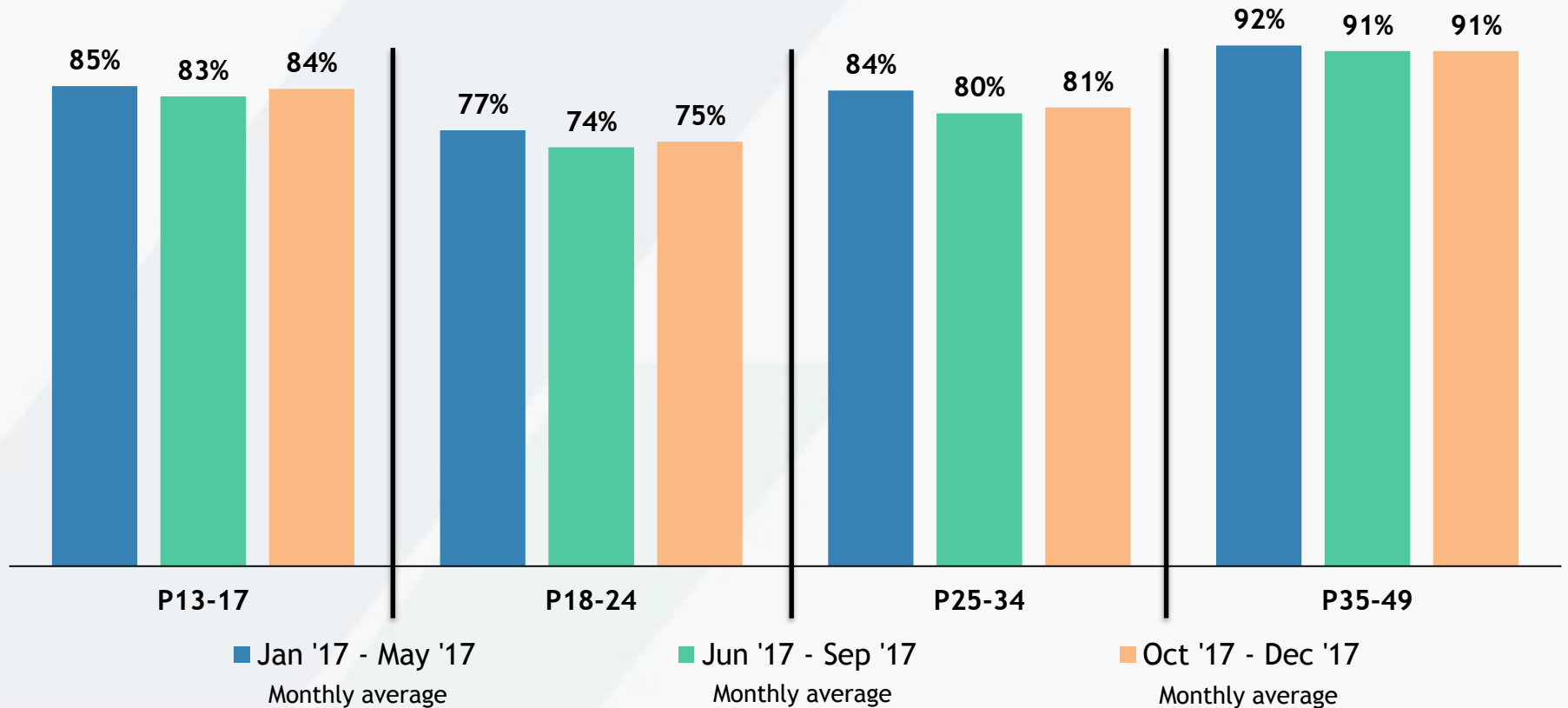
VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen NPower R+F Time Period Report, Household, Primetime, broadcast + cable TV, based on standard calendar months in 2017, Live+7

There's Only A Slight Decline In Primetime Monthly Reach Across Demos During The Summer Months

Ad-Supported TV Monthly Reach (Primetime)

Based on Monthly Average

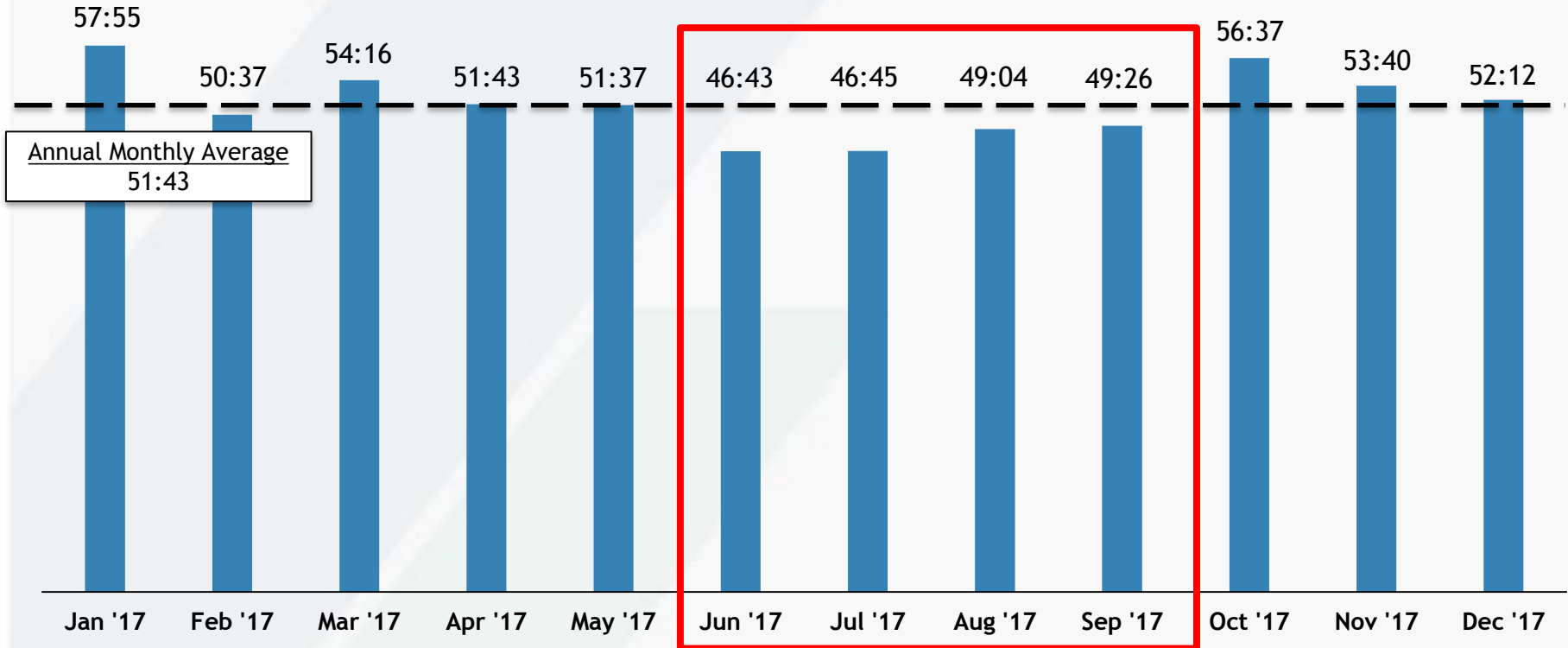


VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen Npower R+F Time Period Report, Primetime, broadcast + cable TV, based on standard calendar months in 2017, Live+7

On Average, Primetime Viewing At The Household Level Is Only 7% Lower During Summer Months

Ad-Supported TV “Average Monthly Time Spent”
Households - Primetime (Hrs:Mins)



VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen Npower R+F Time Period Report, Household, Primetime, broadcast + cable TV, based on standard calendar months in 2017, Live+7

On A Demo Basis, Primetime Viewing Is 13% Lower On Average During The Summer Vs. Winter Months

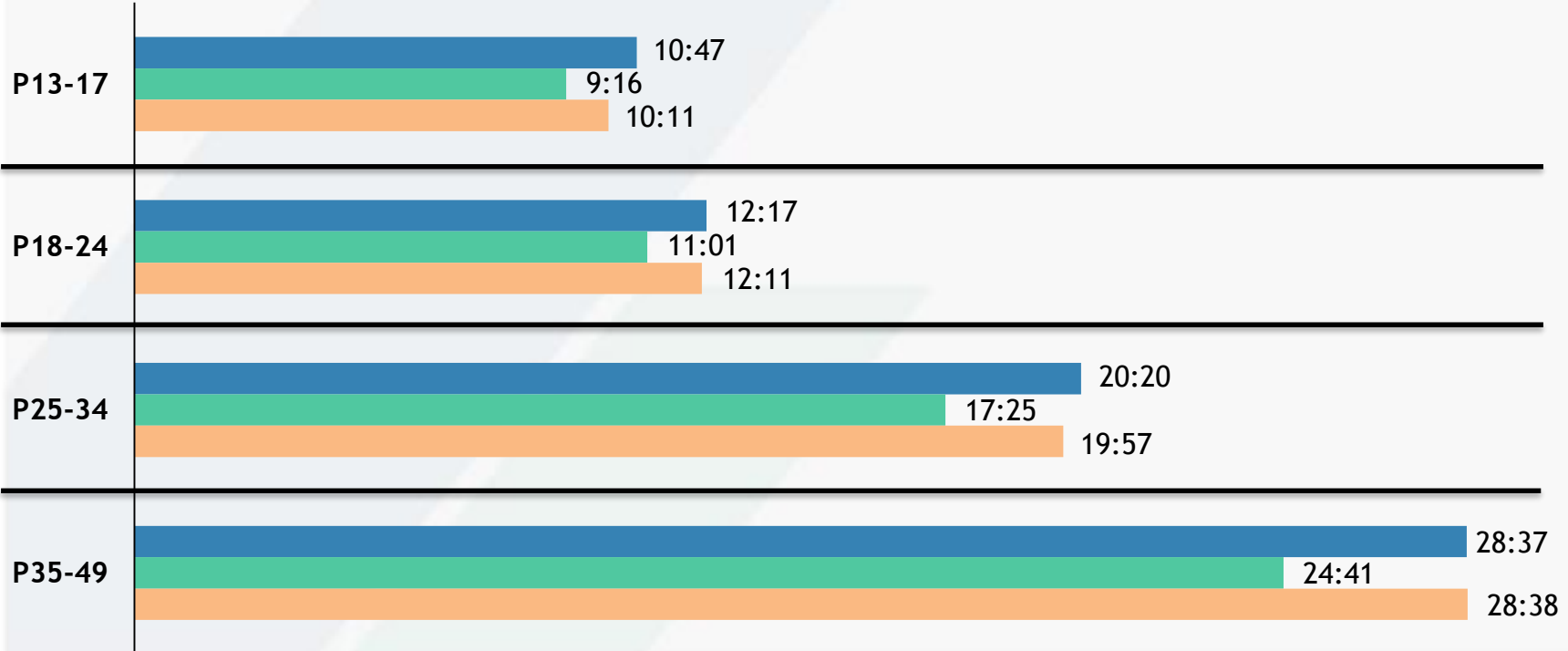
Ad-Supported TV “Average Monthly Time Spent”

Based on Monthly “Primetime” Average

■ Jan '17 - May '17
Monthly average

■ Jun '17 - Sep '17
Monthly average

■ Oct '17 - Dec '17
Monthly average

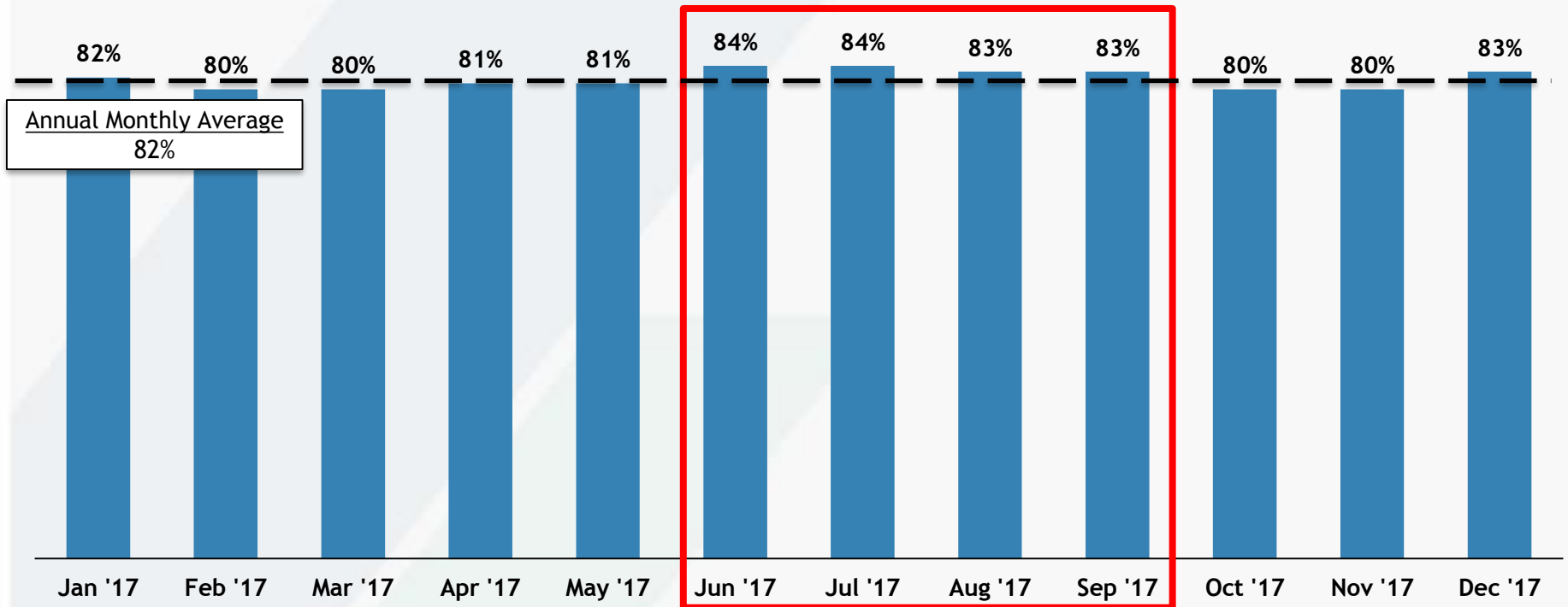


VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen Npower R+F Time Period Report, Primetime, broadcast + cable TV, based on standard calendar months in 2017, Live+7

Slightly More Ad-Supported TV Is Watched “Live” As A Percent Of Total Primetime Viewing During The Summer Months

% of Ad-Supported TV Primetime Viewing Watched “Live”
Households

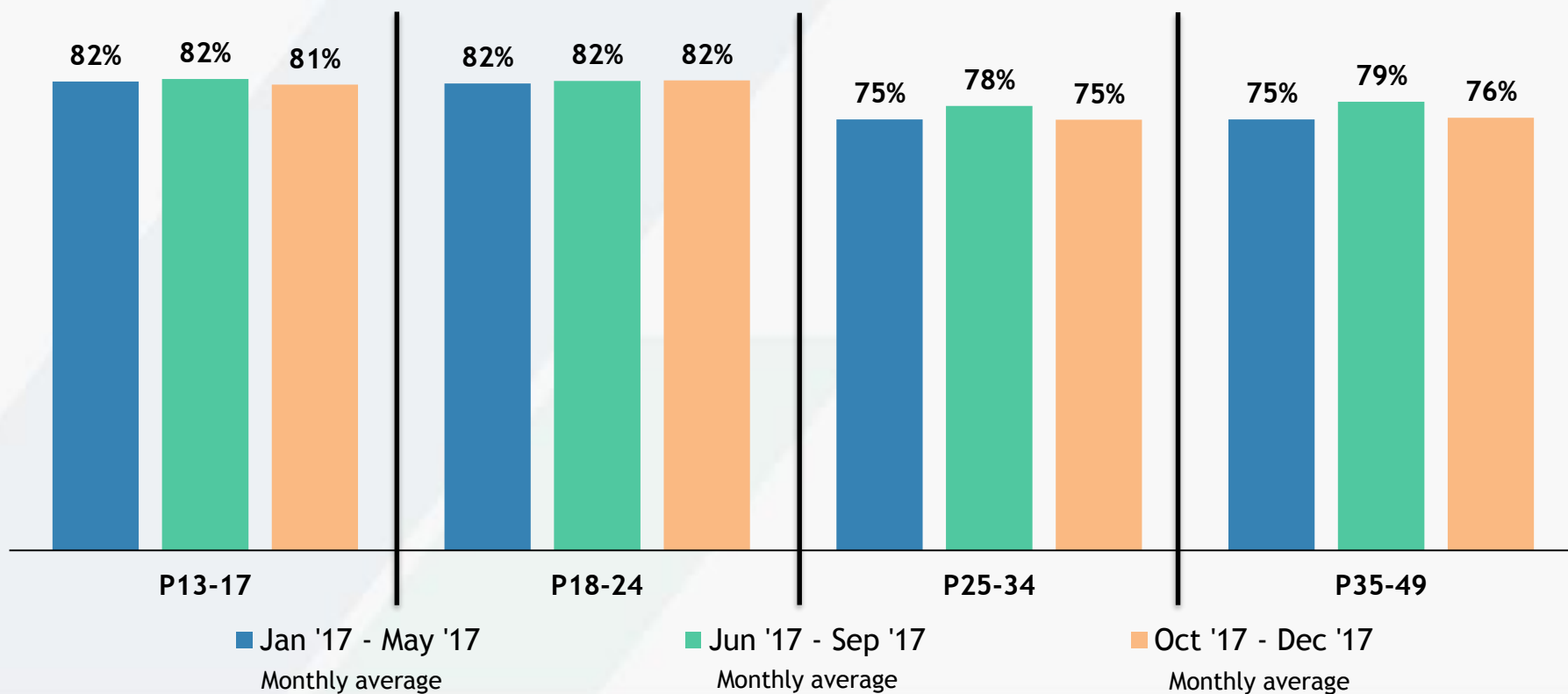


VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen NPower R+F Time Period Report, all TV Households, Primetime, broadcast + cable TV, based on standard calendar months in 2017, Live & Live+7

The Younger Demos Tend To Watch More Of Their Ad-Supported TV Viewing “Live” Throughout The Year

% of Ad-Supported TV Primetime Viewing Watched “Live”
Based on Monthly Average



VAB: THE REAL SUMMER GETAWAY

Source: VAB analysis of Nielsen Npower R+F Time Period Report, based on TV demo population, Primetime, broadcast + cable TV, based on standard calendar months in 2017, Live & Live+7