



Understanding Media Consumption During the COVID-19 Pandemic

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Our intention for today's webinar is to discuss:

- What are the macro trends that Comscore has observed in media consumption?
- What is the impact on advertising and content and how can you adjust?
- How can you learn more information from Comscore as quickly as possible?
- Q & A

As the global novel Coronavirus crisis grows, consumers are making significant changes to the way they interact with content and advertising across platforms.

- Comscore will be providing ongoing updates on shifting consumption trends and the resulting impacts on the advertising and media industries.
- Here are some of the insights we have been able to observe to date:

Coronavirus Insights

Read our ongoing updates on shifting consumption trends and the resulting impact on the advertising and media industries on comscore.com/Coronavirus.

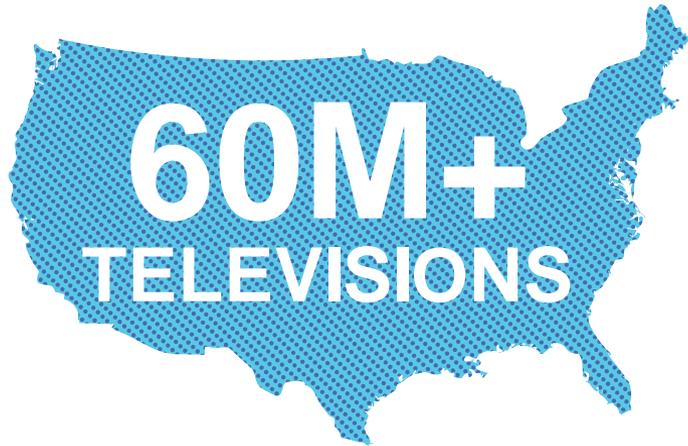
Sign up to be notified when new insights or data become available.

SIGN UP

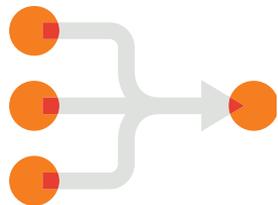


Television Observations

A brief overview of Comscore's TV measurement



- 30M+ Households
- All U.S. Local Markets and 250+ Networks
- 1 out-of-every 4 U.S. Television Homes Directly Measured by Comscore



Passively Collected
from TV household at
the same address



Matched in a
privacy-focused
manner



Deeper
demographic
segments

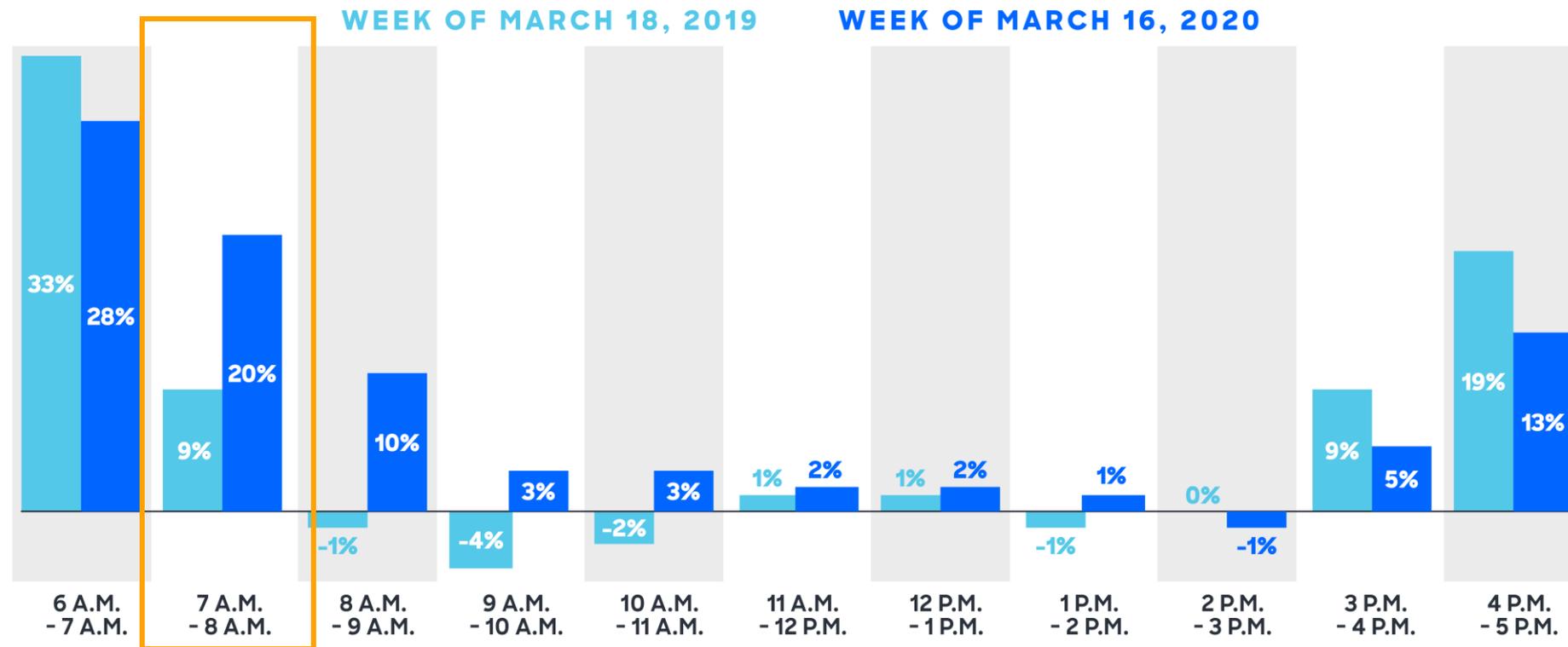


**Weighted and
balanced** at the
ZIP code cluster level

The impact of "stay at home" mandates is evident when examining hour-by-hour growth in 2020 compared to 2019

Hour-by-hour growth in viewing levels in select local markets*

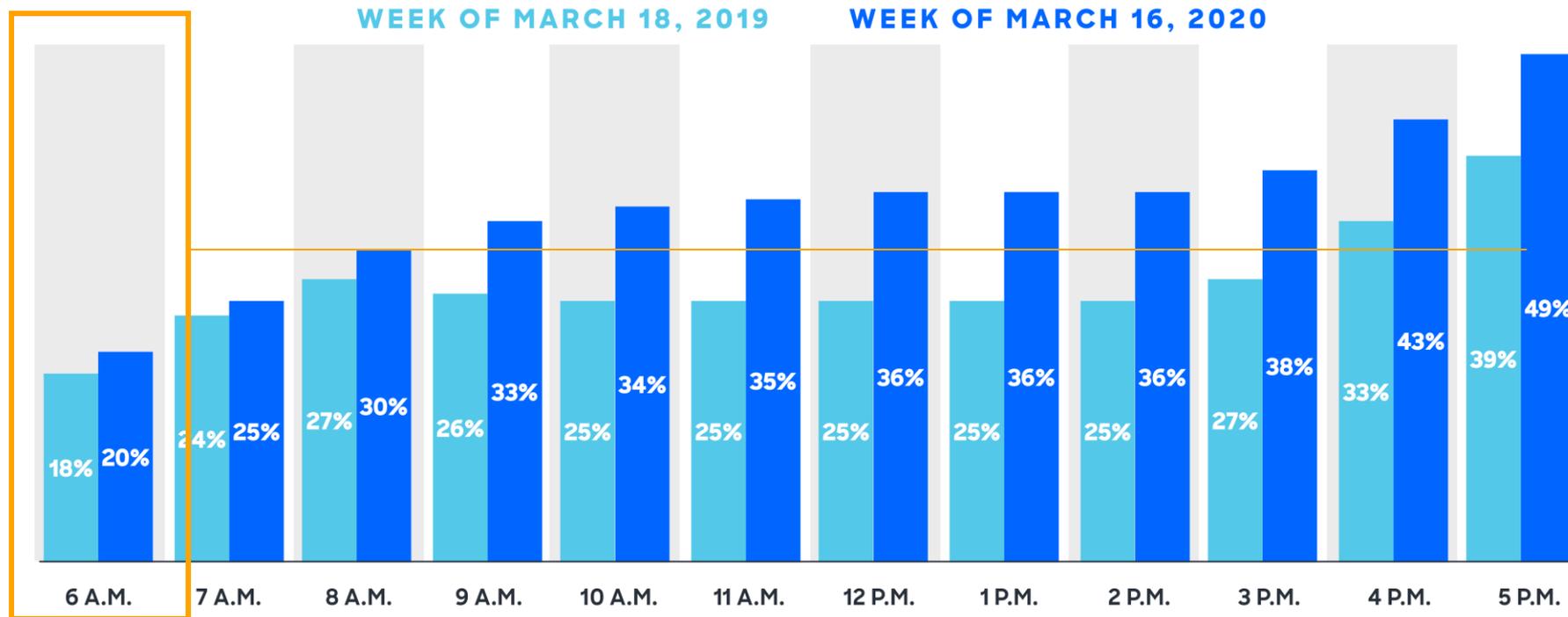
WEEK OF MARCH 18, 2019 VS. WEEK OF MARCH 16, 2020



Local TV viewing is up overall compared to the same week in 2019, especially daytime and early fringe viewing

Viewing levels at hourly increments in select local markets*

SETS IN USE WEEK OF MARCH 18, 2019 VS. WEEK OF MARCH 16, 2020



Viewing of the big four broadcast networks has increased nearly 19% vs. the same week in 2019

Live TV Viewing by Daypart Aggregate of Four Broadcast Networks

MARCH 16-20, 2020

	% CHANGE VS. PRIOR WEEK	% CHANGE VS. SAME WEEK IN FEB.	% CHANGE VS. SAME WEEK IN 2019
ALL DAY	7.6%	12.6%	18.5%
DAYTIME	22.6%	28.4%	31.3%
EARLY FRINGE	17.6%	21.5%	35.2%
EARLY MORNING	2.6%	5.4%	7.9%
LATE FRINGE	-10.7%	1.6%	5.3%
OVERNIGHT	-12.3%	-7.9%	-1.5%
PRIME	-0.7%	3.5%	9.4%
PRIME ACCESS	9.5%	7.3%	12.3%

Viewing of cable news networks increased 73% vs. the same week in 2019

Live TV Viewing by Daypart Aggregate of Seven Cable News Networks

MARCH 16-20, 2020

	% CHANGE VS. PRIOR WEEK	% CHANGE VS. SAME WEEK IN FEB.	% CHANGE VS. SAME WEEK IN 2019
ALL DAY	7.8%	39.8%	73.4%
DAYTIME	24.5%	68.3%	102.6%
EARLY FRINGE	11.7%	55.9%	81.6%
EARLY MORNING	3.8%	17.6%	40.9%
LATE FRINGE	-7.7%	16.5%	58.9%
OVERNIGHT	-9.7%	14.7%	52.4%
PRIME	-2.2%	26.7%	63.8%
PRIME ACCESS	6.2%	36.6%	58.0%

In March, there have been over 170 Coronavirus-specific special national telecasts across eight networks.

- Households in America viewed over 18 million hours of this special programming content.
- “CNN Global Town Hall - Coronavirus: Facts and Fears with Facebook and Instagram” aired on Thursday, March 12.
- This special and content-specific telecast had the highest reach, viewed by over 5 million homes

Financial news networks saw a significant viewing bump

Live TV Viewing by Daypart Aggregate of Two Financial Cable News Networks

MARCH 16-20, 2020

	% CHANGE VS. PRIOR WEEK	% CHANGE VS. SAME WEEK IN FEB.	% CHANGE VS. SAME WEEK IN 2019
ALL DAY	4%	78%	95%
DAYTIME	8%	134%	137%
EARLY FRINGE	5%	131%	157%
EARLY MORNING	3%	82%	95%
LATE FRINGE	-11%	5%	11%
OVERNIGHT	-13%	15%	98%
PRIME	1%	9%	20%
PRIME ACCESS	5%	72%	93%

Daytime viewing of children's programming networks has increased nearly 31%

Live TV Viewing Four Select Children's Programming Networks

MARCH 16-20, 2020

	% CHANGE VS. PRIOR WEEK	% CHANGE VS. SAME WEEK IN FEB.	% CHANGE VS. SAME WEEK IN 2019
ALL DAY	7.9%	3.1%	1.5%
DAYTIME	40.6%	30.4%	30.6%

Local Television

Local Newscasts: Average Household Viewership in Top 10 Markets

PERCENT CHANGE – WEEK OF MARCH 16 VS. WEEK OF MARCH 9 AND WEEK OF MARCH 16 VS. WEEK OF FEB. 17

MARKET	% CHANGE (VS. LAST WEEK)	% CHANGE (VS. LAST MONTH)
Atlanta	3%	7%
Boston (Manchester)	14%	21%
Chicago	10%	15%
Dallas-ft. Worth	14%	23%
Houston	10%	17%
Los Angeles	13%	24%
New York	11%	19%
Philadelphia	12%	20%
San Francisco-Oak-San Jose	18%	30%
Washington, DC (Hagrstwn)	9%	15%

OTT Observations



OTT Streaming on Connected TVs and Boxes/Sticks Increases during Coronavirus Pandemic

Growth in OTT Streaming on Connected TVs and Streaming Boxes/Sticks

MARCH 1-16, 2019 VS. MARCH 1-16, 2020

	OTT HOUSEHOLDS (YOY)	TOTAL OTT HOURS (YOY)
CONNECTED TV	29%	24%
STREAMING BOX/STICK	43%	16%

When comparing the four most recent days of available data, this growth is even more pronounced vs. the same days in 2019.

Growth in OTT Streaming on Connected TVs and Streaming Boxes/Sticks

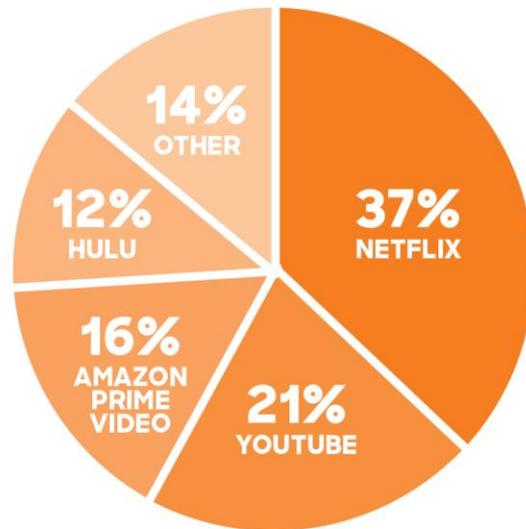
MARCH 15-18, 2019 VS. MARCH 13-16, 2020

	OTT HOUSEHOLDS (YOY)	TOTAL OTT HOURS (YOY)
CONNECTED TV	39%	34%
STREAMING BOX/STICK	47%	20%

The “big four” streaming services still account for most OTT hours viewed on both connected TVs and via streaming boxes/sticks

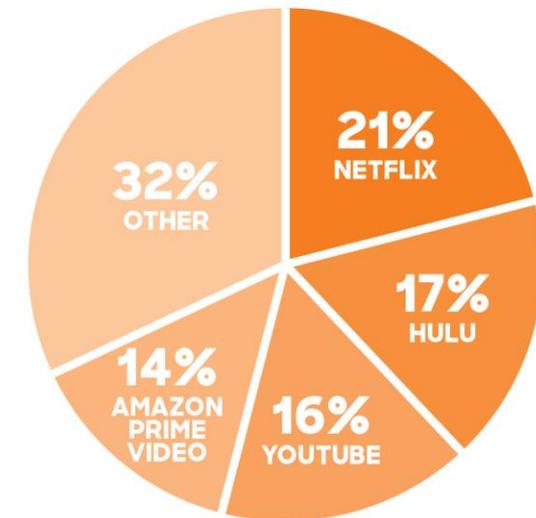
Connected TV: Share of OTT Hours by Service

MARCH 1-16, 2020



Streaming Boxes/Sticks: Share of OTT Hours by Service

MARCH 1-16, 2020



Digital Observations

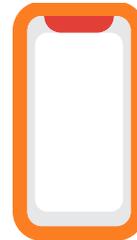


A brief overview of Comscore's digital measurement



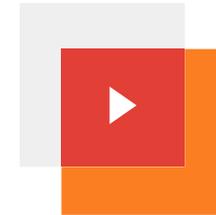
194M

Desktop screens



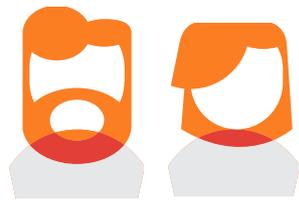
240M

Mobile phones & tablets



45M

Over-The-Top devices



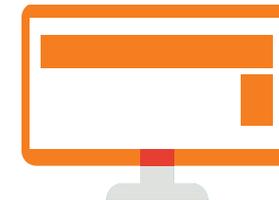
1M

Digital Opt-in Panelists



10,000+

Mobile Apps



10M+

Websites

Comscore Reports Surging Levels of In-Home Data Usage

Gaming consoles (+48%), smart speakers (+44%), streaming boxes/sticks (+38%) and connected TVs (+37%) all saw significant year-over-year upticks

Percent Change in Average Monthly In-Home Data Usage by Device

2019 VS. 2020 - GIGABYTES RECEIVED

	CONNECTED TV	GAMING CONSOLE	PC/MAC	PHONE	SMART SPEAKER	STREAMING BOX/STICK	TABLET	GRAND TOTAL
JAN	26%	6%	-3%	21%	7%	24%	18%	16%
FEB	22%	12%	-5%	27%	-4%	21%	15%	16%
MAR*	27%	12%	-4%	34%	30%	24%	12%	18%

Average Daily In-Home Data Usage by Device

GIGABYTES RECEIVED

SUN/MON/TUES PERIOD	CONNECTED TV	GAMING CONSOLE	PC/MAC	PHONE	SMART SPEAKER	STREAMING BOX/STICK	TABLET	GRAND TOTAL
MARCH 17-19, 2019	2.6	3.0	1.4	0.7	0.1	3.9	0.4	12.0
MARCH 15-17, 2020	3.6	4.4	1.6	1.0	0.1	5.4	0.6	16.6
PERCENT CHANGE	37%	48%	15%	53%	44%	38%	33%	38%

Comscore Observes Shifting Category Trends for Digital Audiences Amid Pandemic

Percent Change in Total Digital Visits to Key Categories

MARCH 16-22, 2020 / TOTAL VISITS, DESKTOP AND MOBILE (WEB AND APPS) / U.S. ONLY

	MARCH 16-22 VS. FEB 17-23	MARCH 16-22 VS. MARCH 9-15
EDUCATION	18%	15%
FAMILY & YOUTH EDUCATION	115%	80%
FINANCIAL SERVICES	-2%	-3%
Investments	43%	6%
GOVERNMENT*	299%	28%
NEWS (EXCLUDING WEATHER)	45%	13%
General News	62%	18%
Local News	89%	30%
Top News Sites*	68%	18%
RETAIL*	11%	3%
SOCIAL MEDIA	16%	10%
TRAVEL	-34%	-34%
Airlines	-24%	-38%
Car Transportation	-27%	-19%
Ground/Cruise	-40%	-50%
Hotel/Resort & Home Sharing	-37%	-42%
Online Travel Agents	-46%	-47%
Travel - Information	-34%	-29%



Source: Comscore Media Matrix Custom Reporting

**Retail* consists of Amazon, Walmart, Target, Costco, and Best Buy.
Top News Sites is an aggregate of 40 of the top digital news sites.
Government combines the CDC, NIH and WHO sites.

News Sites

Total Digital Visits Among Top Digital News Sites

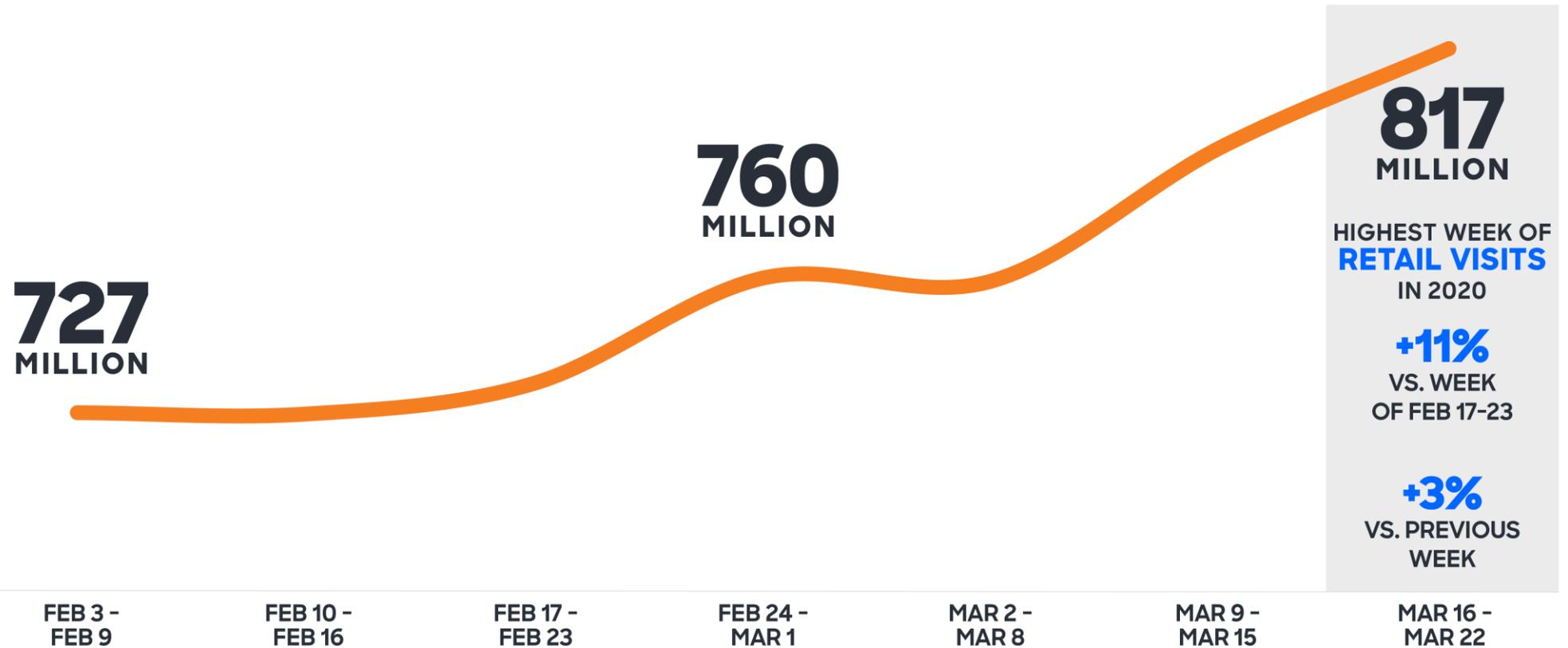
AGGREGATE OF ~40 SELECT NEWS SITES



Retail

Total Digital Visits Among Top Retailer Sites

AGGREGATE OF AMAZON, TARGET, WALMART, COSTCO, BEST BUY



Government Digital Visits

Total Digital Visits to Top Government Sources

AGGREGATE OF CDC, NIH AND WHO



**Media Planning
in uncertain times with
Comscore Advanced Audiences™**

High-profile media events originally scheduled to broadcast are now canceled or postponed

- ACM Awards
- Kentucky Derby
- NBA Basketball
- NHL Hockey
- MLB Baseball
- US Soccer
- PGA Golf
- The Masters Tournament
- NCAA Basketball Tournament
- 2020 Olympic Games
- XFL Football
- Premier League Soccer
- NASCAR
- Indy Racing League

Many in the advertising community now face important questions about how they will approach TV media buying:

PLANNING:

How can you understand the real-time consumption of content and ads to build media plans & package inventory?

TRANSACTIONING:

How can you alter your media investment to reach your target audience when certain programming is no longer available due to cancellation or postponement?

EVALUATION:

How can you prove the impact and ROI of media investments and optimize future spend based on rapidly changing conditions in the media landscape?

Incorporating Comscore Advanced Audiences can help you find your target consumer as local TV viewing habits change

HHs W/ AGE RANGE		HOUSEHOLD INCOME	
A18+, M18+, W18+	A18-64, W18-64, M18-64	\$0 - \$19,999	\$75,000 - \$99,999
A21+, W21+, M21+	A21-24, W21-24, M21-24	\$0 - \$29,999	\$100,000 - \$124,999
A25+, W25+, M25+	A21-34, W21-34, M21-34	\$0 - \$49,999	\$125,000 - \$149,999
A35+, W35+, M35+	A25-34, W25-34, M25-34	\$0 - \$74,999	\$150,000 - \$174,999
A50+, W50+, M50+	A25-49, W25-49, M25-49	\$20,000 - \$29,999	\$175,000 - \$199,999
A55+, W55+, M55+	A25-54, W25-54, M25-54	\$30,000 - \$49,999	\$200,000 - \$249,999
A65+, W65+, M65+	A25-64, W25-64, M25-64	\$30,000 - \$39,999	\$50K+, \$75K+, \$100K+
A18-24, W18-24, M18-24	A35-44, W35-44, M35-44	\$40,000 - \$49,999	\$125K+, \$150K+
A18-34, W18-34, M18-34	A35-54, W35-54, M35-54	\$50,000 - \$74,999	\$200K+, \$250K+
A18-44, W18-44, M18-44	A35-64, W35-64, M35-64	HH COMPOSITION	
A18-49, W18-49, M18-49	A45-54, W45-54, M45-54	Single-Person HH, Male	Two Children in HH
A18-54, W18-54, M18-54	A55-64, W55-64, M55-64	Single-Person HH, Female	Three Children in HH
HHs W/ RACE/ETHNICITY	HHs W/ EDUCATION	Male Present in HH	Four or More Children in HH
African American	College	Female Present in HH	Two Adults in HH
Asian American	Grad School	Single-Parent HH, Male	Two Adults in HH, Both Male
Hispanic	High School	Single-Parent HH, Female	Two Adults in HH, Both Female
White	Some College	Children Present in HH	Three Adults in HH
Other	Some High School or Less	No Children Present in HH	Four or More Adults in HH
RESIDENCE OWNERSHIP		One Adult with Children in HH	A35-64 and A18-24
Owns Home	Rents	One Child in HH	A25-54 and A65+

Comscore Activation



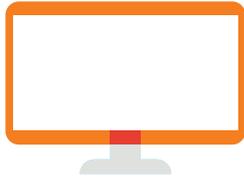
Cross-platform data powers activation across platforms

Build audience targets based on:



DEMOGRAPHICS

- Age
- Gender
- Valid Human Segment



TV VIEWING

- Networks
- Live Events
- Genres
- Custom



OTT CONSUMPTION

- Select Providers
- Consumption Intensity
- Gaming Intensity
- Cord Cutters

AUDIENCE TARGET



Female, 18 – 24

Watches Monday Night Football
Saw a “Ford 150” advertisement
Netflix Viewer

Activate targets on:

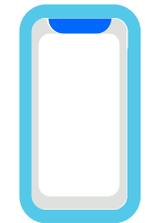
DESKTOP

Based on User IDs
(i.e. Cookies)



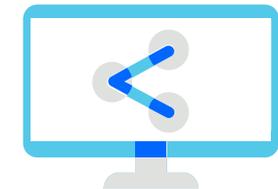
MOBILE

Based on Mobile
Identifier for Advertising
(i.e. Devices)



CONNECTED TV*

Based on Connected
TV Identifier for
Advertising
(i.e. Devices)



Comscore is partner agnostic

adf**o**rm

salesforce DMP

MediaMath

Adobe

AMOBEE

xandr

centro

LiveRamp
an axiom company

neustar

ORACLE[®]
Data Cloud

adikteev

theTradeDesk[®]

TRUOPTIK[®]

...and more

NEW Epidemic Brand Suitability Segments

Nuanced brand suitability levels based on risk tolerance



Safe from **Epidemic – High Risk** avoids risky/negative stories, such as COVID-19 deaths



Safe from **Epidemic – Low Risk** avoids educational, celebrity news and preparedness coronavirus content



Leverage both **High Risk** and **Low Risk** to avoid ALL content related to the current health situation and other epidemics

Broadcasting+Cable

Advertising Programming Streaming Biz Stations Policy Tech Events Resource Center

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Comscore Helping Advertisers Weigh Running in Virus Content

As much as 30% of ads appear in material with crisis themes

Jon Lafayette · Mar 19, 2020



Comscore said its brand safety tools have added a segment that will screen content to protect brands from unwanted associations with the COVID-19 crisis.

Over the past week 22% to 30% of ad impressions were running alongside content that contains themes related to the Coronavirus and related epidemic themes.



The new tool will let advertiser fine-tune their brand safety applications based on their risk tolerance as more material about the pandemic appears in the media.

The tool also give publishers the flexibility they need to help their advertisers navigate the evolving Coronavirus news cycles, Comscore added.

The Comscore Difference – Brand Suitability Protection

Always-on Brand Safety



Provides peace of mind with brand protection coverage that **updates in real-time at the appropriate risk threshold**

Non-Binary Solution



Provides nuanced levels based on risk tolerance, **avoiding an all or none approach** seen with blacklisting

Avoid Keyword Updates



Intelligent categorization technology **employs machine learning**, so segments evolve with new terminology

Understanding Media Consumption During the COVID-19 Pandemic: Initial findings

- In a time of crisis, people turn to local, cable and digital news sources
- Daytime and Early Fringe television viewership is on the rise as households self-isolate and social distance at home
- OTT streaming has increased with shift to stay/work-at-home
- In-home data usage across multiple device and platforms types has surged
- Interest has soared for government healthcare information sources as well as Coronavirus-specific news content on TV

As the global novel Coronavirus crisis grows, consumers are making significant changes to the way they interact with content and advertising across platforms.

- More information is available on our website and our Coronavirus data hub.
- We will be hosting more Coffee with Comscore webinars in the coming days and weeks.
- Q&A

Coronavirus Insights

Read our ongoing updates on shifting consumption trends and the resulting impact on the advertising and media industries on comscore.com/Coronavirus.

Sign up to be notified when new insights or data become available.

SIGN UP





Thank you!

Jeff Sarault

SENIOR SALES DIRECTOR
INDEPENDENT AGENCY/ADVERTISER

