



# *MEDIA IMPACT REPORT #3*

COVID-19 Pandemic Advertising Ecosystem Impact

**3.25.2020**

## TOP 3 THINGS TO KNOW

1

We are seeing pricing advantages across most media channels – TV, Display, Native, Paid Social and Video

2

Consumer behavior is changing by the day, as more states shift to “stay-at-home” mandates. This creates a need for brands to think critically about messaging alignment with new consumer realities

3

TV content providers are using new approaches to distribute their content via linear and social platforms







# Media Updates



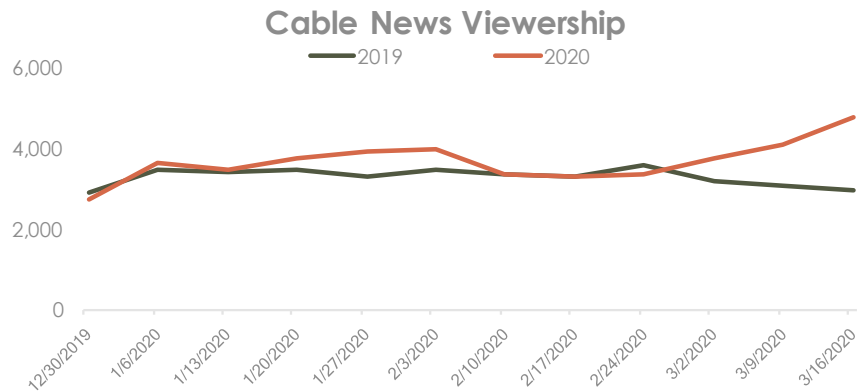


## TV VIEWERSHIP

Monday-Friday – week of 3/16

- TV viewership continues to rise week-over-week as coronavirus-related shutdowns move across the U.S.
  - Household viewership is up 10% WoW on cable (M-F) and is trending 12% higher on broadcast networks.
  - Cable news for last week was up 58% YOY.
- Fox News, MSNBC, and CNN dominated cable viewership last week.
- Top non-news networks include: HGTV, Hallmark, Nick-at-Nite, ID, and History.
- Top TV programs for the week of 3/16 were ABC World News, NBC Nightly News, The Voice, and Chicago Fire.
- Viewership on Sports cable networks declined weekly (-17%), except for NFL Network; which doubled last week due to free agency reports.
- Movie networks experienced a lift in ratings last week.

Genre	HH Impressions YAG (3/18/19)	HH Impressions (3/16/20)	% Change YOY
News	3,066	4,836	58%
General Entertainment	3,627	3,392	-6%
Family	2,337	2,228	-5%
Education	2,180	1,832	-16%
Home/Lifestyle	1,344	1,312	-2%
Classic	1,242	1,030	-17%
Movie	796	869	9%
Comedy	1,152	857	-26%
Women's Interest	852	832	-2%
Sports	897	636	-29%
Music	663	605	-9%
Hispanic	149	141	-5%
Auto	110	120	9%



Source: Nielsen





## NEW APPROACHES TO CONTENT

With separation orders in place, content producers are creating new ways to deliver content

“Considering current social distancing protocols, all shows have said goodbye to their live studio audiences and have even had to join their co-hosts from afar— ([Savannah Guthrie](#)). But, thanks to the magic of technology, more and more shows are figuring out how to return to their viewers in new and inventive ways.”

- **Conan:** Returning 3/30 with new episodes to be shot remotely on an iPhone, including guest interviews via video chat.
- **Jimmy Fallon:** Broadcasting from home. In this installment, his daughter serves as his “mini band.” [Jimmy Fallon](#)
- **Kelly and Ryan:** Each broadcasting from their own homes, focusing on content around people who are self-isolating.
- **Ellen:** Moved her content to social media. [Ellen](#)



Source: eonline.com





## HOW BRANDS ARE RESPONDING

- **Verizon** pivots to “We’re Here, and We’re Ready” – Verizon engineers talk about how the network is prepared to help Americans stay connected.
- **Guinness** runs “[Don’t worry, we’ll march again](#)” spot for St. Patrick’s Day. Guinness also pledged \$500K to help communities throughout the country with its Guinness Gives Back Fund.
- **GMC** launches program to include 0% interest rate on loans, deferred payments, and access to OnStar.
- Plans for **NBCU, Viacom and Disney** to air PSAs, per CNBC report.
  - “The idea is to use the nation’s largest media companies and digital platforms to get out consistent messaging across television, radio, social media, out-of-home and digital media. All of the new ads direct audiences to [www.coronavirus.gov](http://www.coronavirus.gov) and appear during time or space that’s donated by the media.”

Source: CNBC





## TELEVISION

- **Marketplace has opened up this week** as we head into broadcast Q2. Many network groups have open inventory as QSR's and retailers have canceled or shifted ad dollars to later in the year.
  - CBS is offering primetime avails starting Thursday, 3/26 and into next week.
  - Warner Media (TBS and TNT) has inventory to fill this week and in April.
- **Strong media clearance** started last week and we are seeing a majority of schedules place week of 3/23 (in some cases rates that have not cleared in previous weeks are clearing in full).
- The Olympics has been officially postponed to 2021, and we are evaluating impacts/options to future client plans.

We recommend getting network approvals and making any creative adjustments needed to access network firesales.





## AUDIO

- **Terrestrial:**

- Added Value Opportunity: iHeart/Premiere launching new “Spotlight on Businesses Doing Good” for clients who want to share their COVID-19 response efforts via national radio, no strings attached.

- **Streaming:**

- Experiencing high volatility by advertisers, but platform usage is slightly up and remains that way.
  - Pandora consumption is 80% mobile, making it easy to access anywhere.
- E-commerce and “direct-to-door” deliveries still thriving.
- Amazon, Papa Johns, and local health organizations launching and growing new campaigns.
- Local and regional retail (i.e. auto) primarily postponing media ~30 days, versus cancelling.
- Pandora offering free re-work of audio and banner assets, if messaging update is needed.

- **Podcast:**

- Wednesday, 3/18, was the single highest day cumulative podcast audience ever within the iHeartRadio app.
- Listening of news podcasts via the iHeartRadio app outpaced the last three months by +15%.







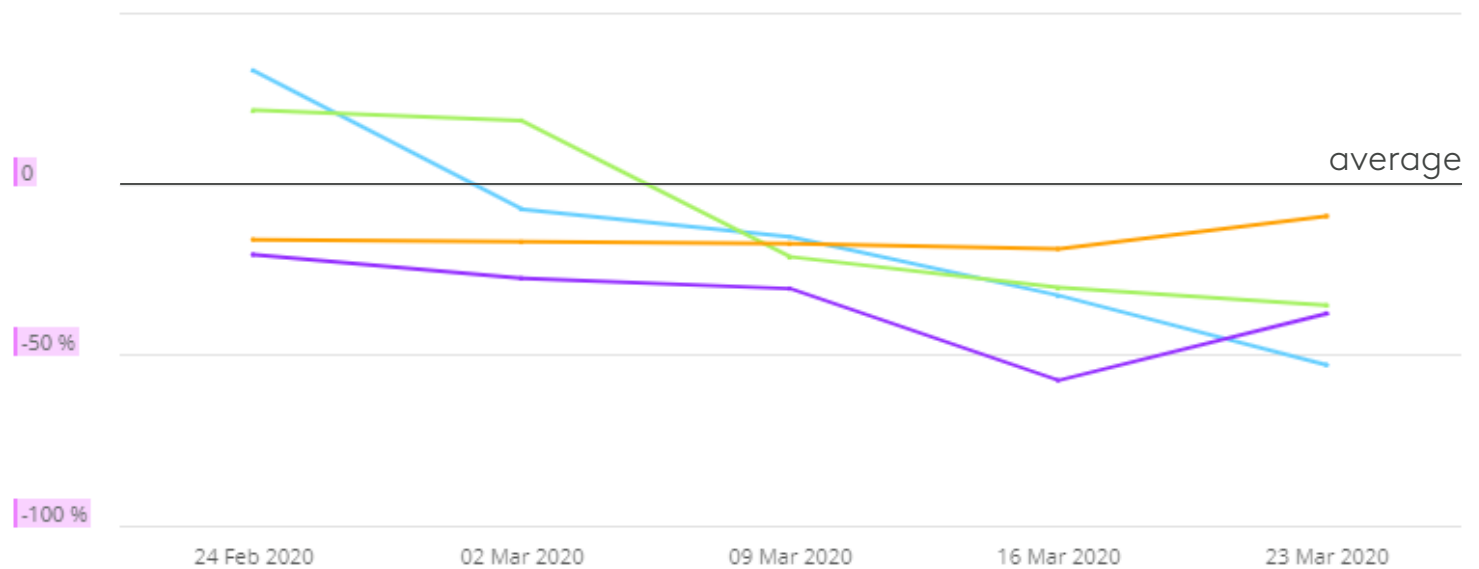
### DIGITAL DYNAMIC PRICING TRENDS

- Dynamically priced Display, Native, Paid Social, and Video CPMs continue to trend more efficiently vs. historical averages.
  - A result of lower advertiser pressure within real-time bidding auctions, and more inventory as users consume more digital content at home.
- Note: Paid Search CPCs have more variability by industry with generally strong advertiser competition within Shopping and Non-Brand campaigns in March.

### CPM vs Benchmark By Channel

CPM v Benchmark

● Display ● Native ● Paid Social ● Video





## PINTEREST UPDATE & TRENDS

People are looking for ideas. They want help. They want it from brands they trust. Answers could come in the form of tips, editorial content from your website or blog, a product, a new use case and more.

Pinterest has limited search results on COVID-19 and related terms to surface only the most vetted information the World Health Organization and the Centers for Disease Control and Prevention:

The screenshot shows a Pinterest search interface for 'coronavirus'. At the top, there's a search bar with 'coronavirus' and filters for 'All Pins'. Below the search bar is a light blue warning box stating: 'Pins about this topic often violate our **Community Guidelines**, which prohibit harmful medical misinformation. Because of this, we've limited search results to Pins from internationally-recognized health organizations. If you're looking for medical advice, please contact a healthcare provider.'

Below the warning are three WHO infographics:
 

- Reduce your risk of coronavirus infection:** Includes tips like 'Frequently clean hands by using alcohol-based hand rub or soap and water' and 'When coughing and sneezing cover mouth and nose with flexed elbow or tissue - throw tissue away immediately and wash hands'.
- HOW TO PUT ON, USE, TAKE OFF AND DISPOSE OF A MASK:** Focuses on 'Before and after wearing a mask, wash hands with alcohol-based hand rub or soap and water'.
- WHEN TO USE A MASK:** States 'For healthy people wear a mask only if you are taking care of a person with suspected COVID infection' and 'Masks must be used in combination with frequent hand-washing with alcohol-based hand rub or soap and water'.

To the right of the infographics are two trend cards:
 

- Spring break ideas:** Shows a 3x increase in spring break destination searches, a 40% increase in road trip ideas for kids, a 40% increase in searches for staying break at home with kids, and a 30% increase in 'staycation' related searches.
- Ideas for kids:** Shows a 62% increase in searches for educational activities related to germs.

### What users are doing on Pinterest:

1. They're searching for solutions. Searches like "how to entertain bored kids" and educational activities related to germs are rising.
2. They're still planning for future moments. Searches for 'weddings' and 'birthdays' are as high as ever, and people are still planning for upcoming seasonal events: we've seen a 70% increase in Easter-related queries
3. They're seeking positivity. The constant stream of news online can get overwhelming. More than ever, people need a positive corner on the Internet. Searches for "keeping calm" and "staying calm" increased 31% in the last two weeks vs. the two weeks prior.



FOR MORE  
INFORMATION



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