

**Standard  
Media  
index**

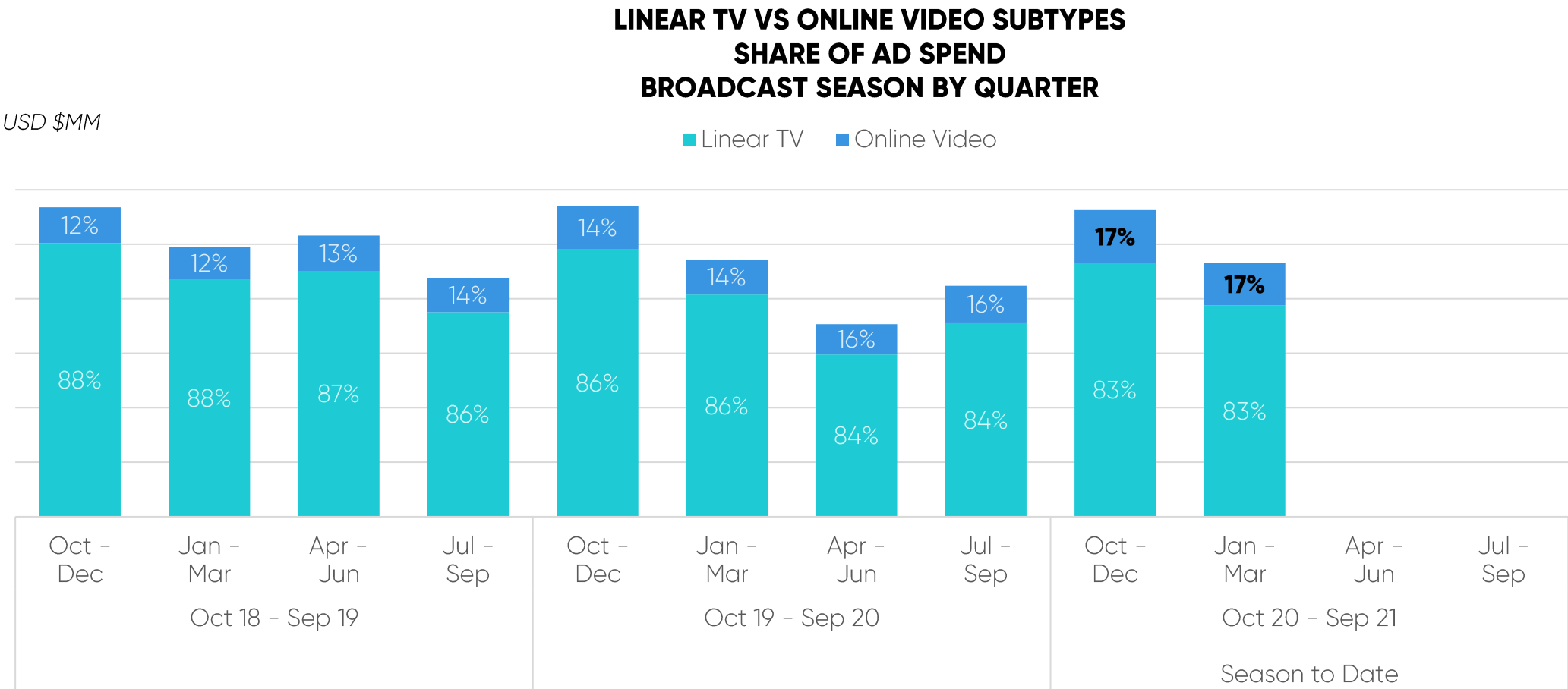
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SMI ACCUTV  
MEDIAPOST OUTFRONT FORUM

APRIL 2021



LINEAR TV REMAINS THE LION'S SHARE OF INVESTMENT, BUT ONLINE VIDEO DESTINATIONS HAVE SUSTAINED A NEW HIGH SHARE IN BACK-TO-BACK QUARTERS.

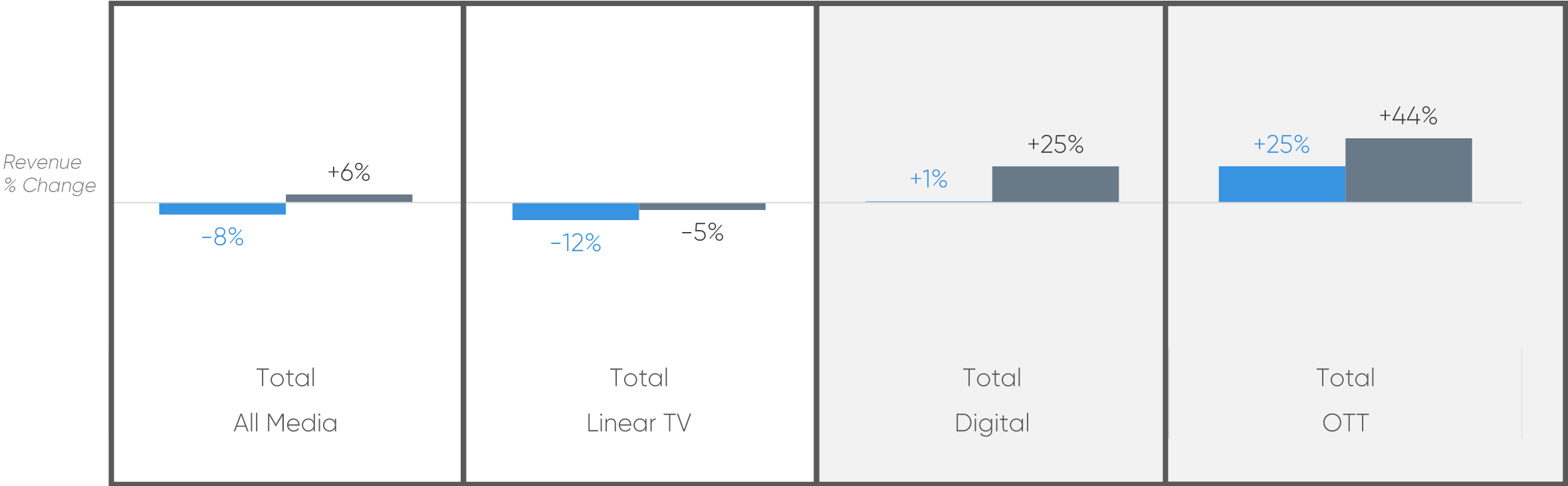


Source: SMI Core  
Percentages indicate percent share of Linear TV + Online Video Sites Only<sub>2</sub>  
Online Video = Pure Play Video + TV Network Digital Sites

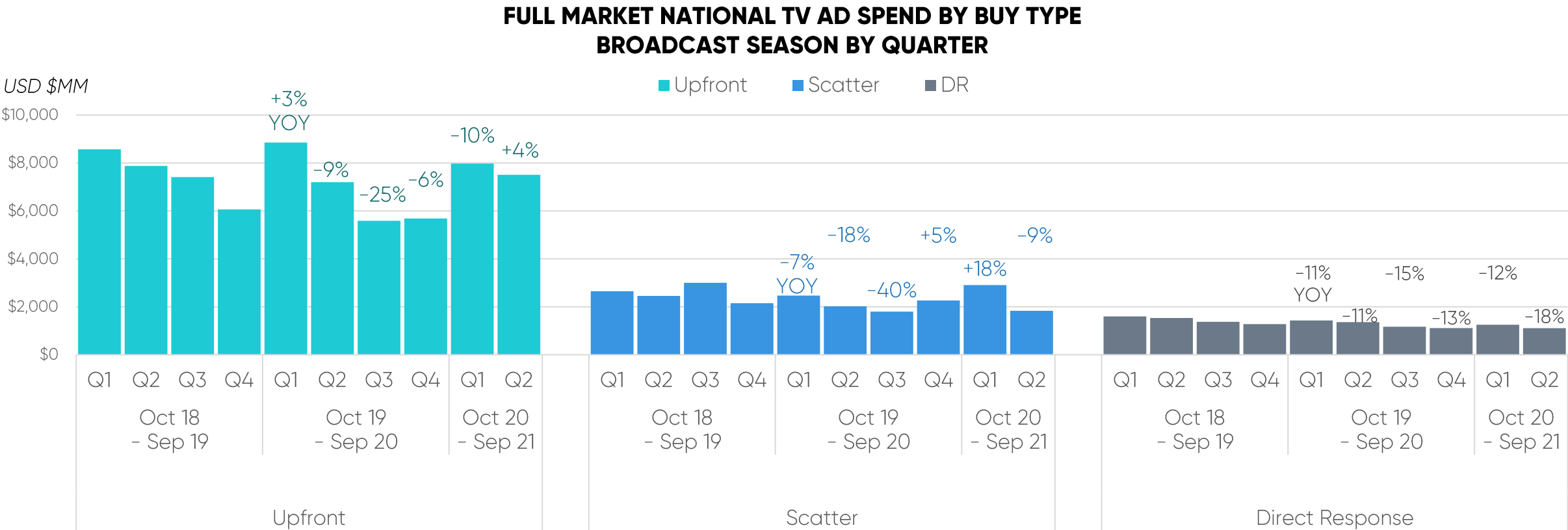
LINEAR TV'S RATE OF DECLINE HAS IMPROVED DURING SEASON TO DATE VS LAST YEAR, WHILE OTT OUTPERFORMS WITH DOUBLE-DIGIT GAINS ACROSS PERIODS.

KEY MEDIA TYPES - AD SPEND TREND  
BROADCAST SEASON PERIODS

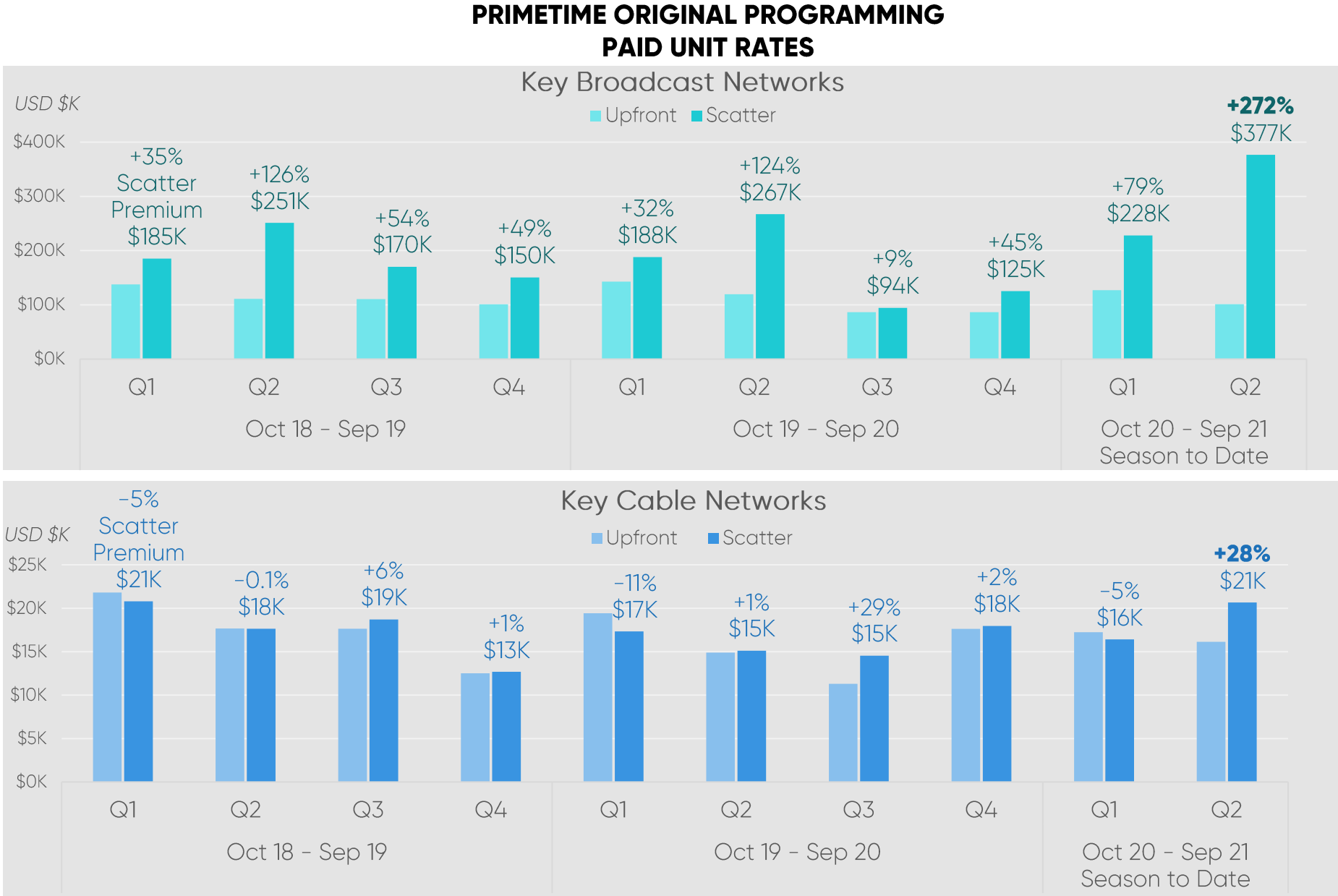
■ Last Full Broadcast Season  
(Oct 19 - Sep 20 vs Oct 18 - Sep 19)      ■ Current Broadcast Season to Date  
(Oct 20 - Mar 21 vs Oct 19 - Mar 20)



UPFRONT RETURNED TO YOY GROWTH, FOR THE FIRST TIME SINCE COVID TOOK HOLD, DURING JAN – MAR 2021 (+4%) VS LAST YEAR. SCATTER SUSTAINED YOY GROWTH DURING JUL – SEP 2020 (+5%) & OCT – DEC (+18%) PERIODS BUT SLOWED IN JAN – MAR 2021.



BROADCAST  
SCATTER PRICING  
PEAKED IN JAN –  
MAR 2021, WHILE  
CABLE SCATTER  
PRICING REACHED A  
LEVEL NOT SEEN  
SINCE OCT – DEC  
2018



Source: SMI AccuTV  
New, Primetime

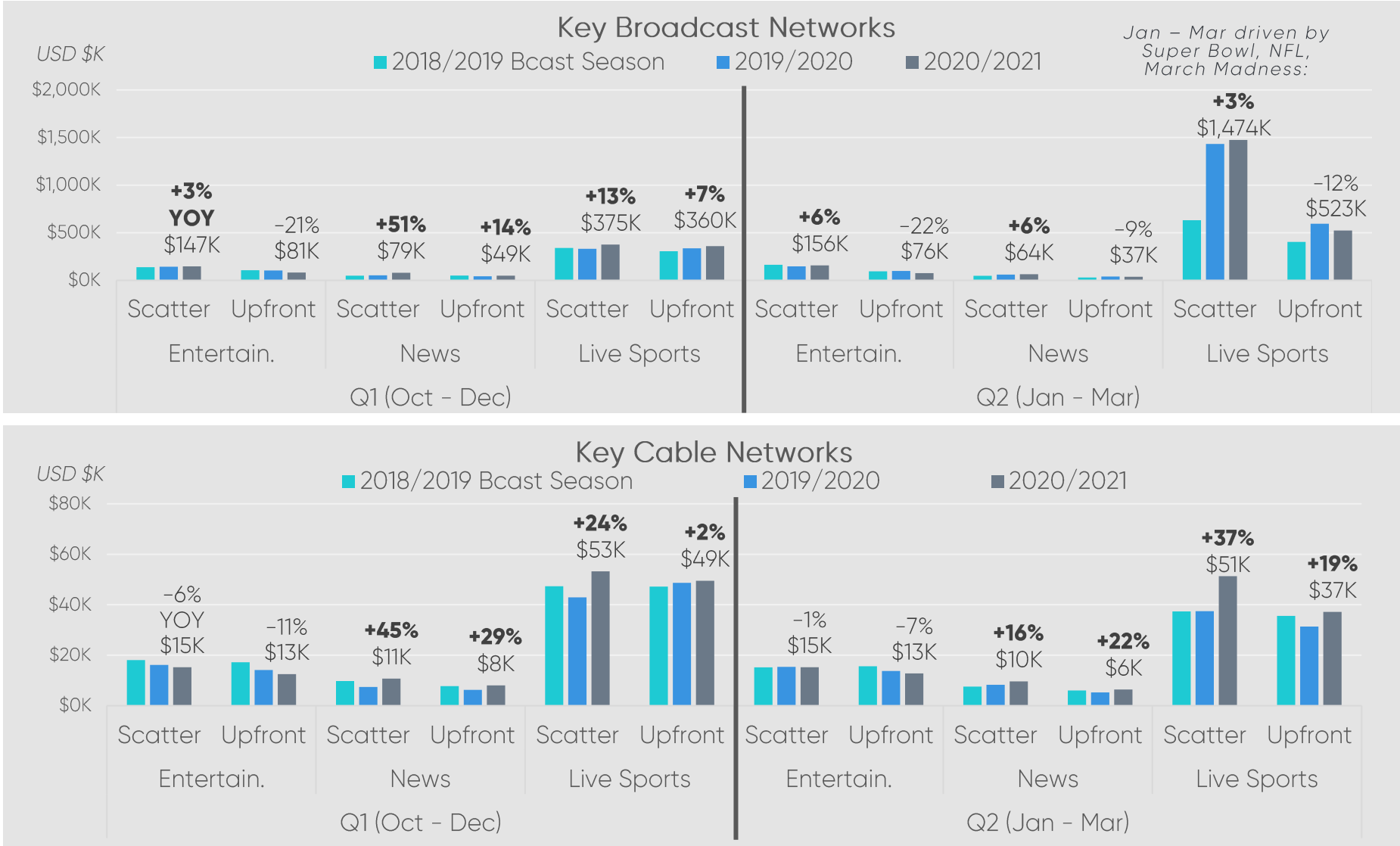
\*Broadcast TV Cost Sample includes: ABC, CBS, FOX, NBC  
\*Cable TV Cost Sample includes: A&E Network, AMC, CNBC, CNN, Discovery Channel, ESPN, Food Network, FOX Business Network, FOX News, FOX Sports 1, HGTV, History, MSNBC, TBS, TNT, USA Network

BROADCAST PRICING GREW ACROSS BUY TYPES & GENRES IN OCT – DEC, EXCLUDING UPFRONT ENTERTAINMENT. SCATTER PRICE LIFT CONTINUED INTO JAN – MAR, ALBEIT AT A LIGHTER GROWTH RATE, WHILE UPFRONT SHIFTED TO DECLINE.

IN BACK-TO-BACK QUARTERS, CABLE SUSTAINED PRICING LIFT ACROSS NEWS & LIVE SPORTS BUY TYPES.

CABLE NEWS & LIVE SPORTS ATTAINED DOUBLE-DIGIT PRICING GAINS ACROSS BUY TYPES IN JAN – MAR YOY, OUTPERFORMING BROADCAST.

PRIMETIME ORIGINAL PROGRAMMING BY GENRE  
PAID UNIT RATES



Source: SMI AccuTV  
New, Primetime

\*Broadcast TV Cost Sample includes: ABC, CBS, FOX, NBC  
\*Cable TV Cost Sample includes: A&E Network, AMC, CNBC, CNN, Discovery Channel, ESPN, Food Network, FOX Business Network, FOX News, FOX Sports 1, HGTV, History, MSNBC, TBS, TNT, USA Network