



TV & Radio Overview

Corus March 2020

localTempo.₁ **corus.**



National Overview

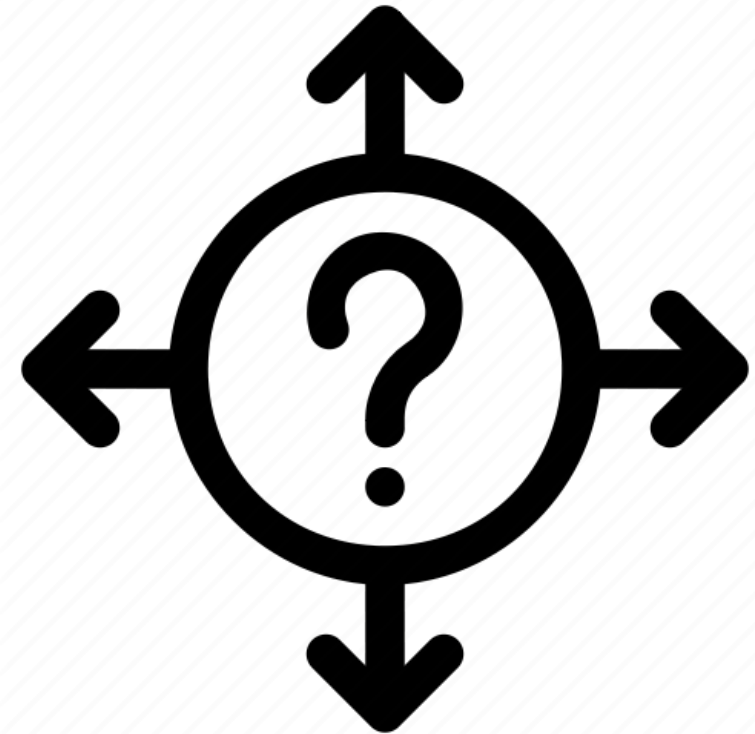
What leading marketers and advertising leaders are saying...

In this climate of uncertainty, advertisers can be empathetic in their promotion of their brand story.

Reinforcing brand top of mind awareness and reach is most effective with the current conditions. Continue to build on long term brand momentum to reinforce lifetime value versus short termism.

Corus can be the powerful messaging platform. Let us customize an opportunity for you.

Source: [Strategyonline.ca/2020/03/17/Brand building in unprecedented times](https://strategyonline.ca/2020/03/17/Brand-building-in-unprecedented-times)



Pivotal events changed how we are consuming media...

Recap on News Events over the past week Wed Mar 11th – Wed Mar 18th

- Wed Mar 11th World Health Organization announcement of COVID19 Pandemic
- Thu Mar 12th Trump suspends all travel, Justin & Sophie Trudeau in seclusion, Sports announces suspension of season across organizations: MLB, NBA, NCAA, UEFA and person limits to congregations
- Week of Mar 16th, closures to public houses, Canadian schools K-12 and borders.

Effects throughout North America, Canada and locally are similar. In this deck, you will see some directional data as it is early days; However, we don't see any surprises with the summarized findings as per below:

- Audience growth across all media platforms
 - Total TV viewing levels are **up 13%-15%** vs. the 6 weeks prior
 - Audiences for Global National News are **up 58%** vs. 6 weeks prior, and Global News Hour/News @ 6 is **up 53%** vs. 6 weeks prior
 - All Corus Radio stations across the metered markets, the A18+ AMA is **9-10% higher** than the 6 weeks prior
 - Looking at GlobalNews.ca, we are seeing traffic volumes that we have not seen since the last election. Looking at last week vs. the week prior there have been:

An 88.2% increase in average daily visitors to the site (5 million), a 105% increase in page view volumes (53 million), an 125% increase in video view transactions (16.2 million) and a 168% increase in Media Time Spent

In social, the overall reach of our brands **increased 40%** week over week

Sources:

- TV: Numeris PPM Data. Jan 27/20 – Mar 11/20 vs. Mar 12/20 – Mar 15/20 – Confirmed up to Mar 1/20. Total Canada/AMA(000). A25-54. Thurs-Sun.
- Radio: Numeris PPM Data, Dates = 1/30/2020 to 2/2/2020, 2/6/2020 to 2/9/2020, 2/13/2020 to 2/16/2020, 2/20/2020 to 2/23/2020, 2/27/2020 to 3/1/2020, 3/5/2020 to 3/8/2020, 3/12/2020 to 3/15/2020, Area = Total Meter CTRL, Demos = A18+, A25-54, All Global News = CKNW, CFMJ, CHQR, CHED*, CHQT *CHED isn't a "Global News" branded station but is a news station and we include it when looking at Corus Radio news stations
- Digital: ComScore Metrics 16/02/2020 – 16/03/2020

The industry is seeing lots of losses in Sports with more significant losses potentially to come...

Sporting Events Cancelled / Postponed

- **NHL & NBA, NCAA** suspended season
- **European Championship** has been delayed for a year by UEFA
- UEFA has called an emergency meeting for Tuesday to discuss whether **Euro 2020** can go ahead as scheduled.
- The **US Masters**, the first men's golfing major of the year, has been postponed.
- The **French Open** has been postponed until September.
- 2020 **Grand National** is Cancelled
- **London Marathon**



<https://nationalpost.com/news/world/covid-19-olympics-athletes-frustrated-confused-after-olympic-committee-decides-to-continue-tokyo-games>

2020 Summer Olympics Status

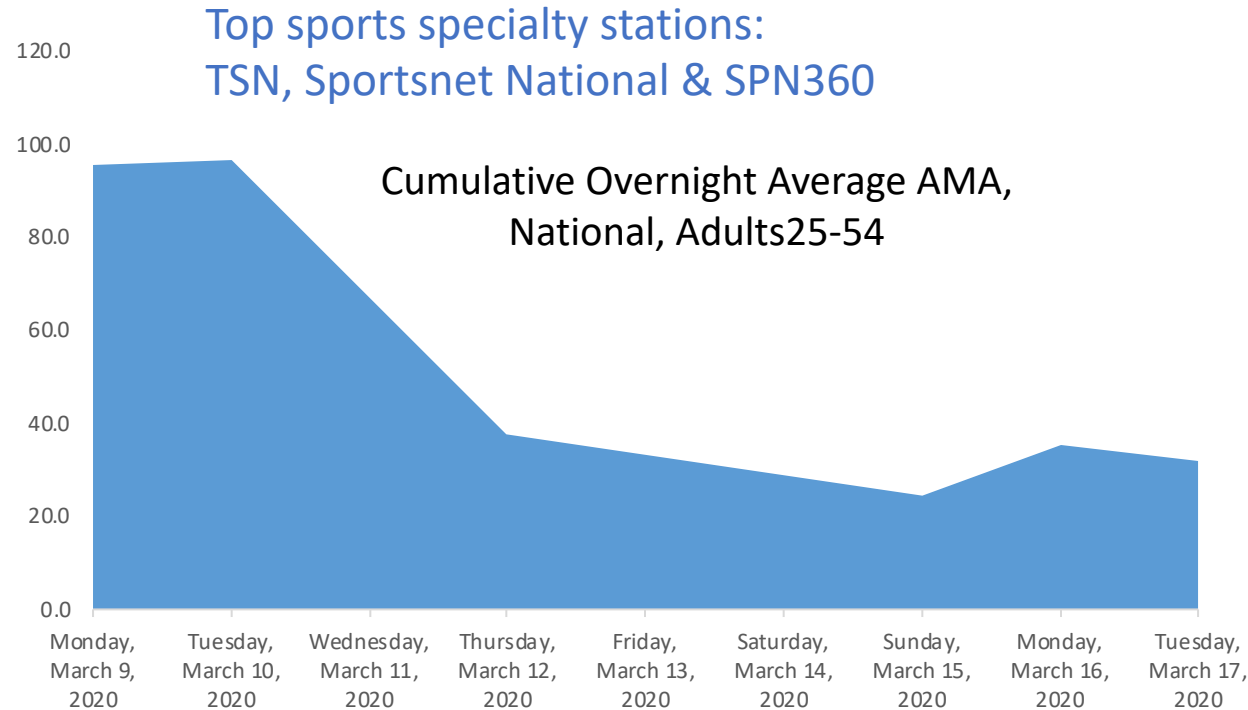
The IOC has refused to publicly consider cancellation or postponement as possible options

However;

- Athletes can't train or compete – only 53% have earned their Olympic spots to date
- Attendees can't travel plan.
- **Sponsors and marketers can't market with a degree of sensitivity.**



...Sports audience losses are extreme for the season,
dropping 67% over 6 days



Spring typically trends high AMA's for Sports. It's not unusual to see sports rank within the top 5 (Adults 25-54) as popularity of live event NHL hockey & NBA is at its peak

March 19th, Rogers announces no live sport programming productions until further notice. Focus on past program footage

Sports stations have a huge hurdle to recoup eyeballs

*Note that the situation is evolving – these should be treated as early indicators

...News, Lifestyle, and Entertainment audiences grow significantly

Specialty Network Ranker

Tuesday, March 17, 2020

Adults 25-54

Stations	STD (M-Su 2a-2a)	Overnight	Index (Day vs STD Avg)
	12/30/2019 - 3/8/2020	3/17/2020	
CBC News Network+	12.0	51.5	429
YTV+	13.1	30.8	235
CTV Comedy+	41.2	29.6	72
CTV News Channel+	4.9	26.6	543
HGTV+	19.3	21.5	111
CTV Sci-Fi+	27.7	19.4	70
Treehouse+	10.0	16.0	160
Showcase+	22.9	15.6	68
CTV Drama+	23.2	15.4	66
TSN+	58.1	14.7	25
History+	25.4	14.4	57
Discovery+	25.2	13.7	54
W Network+	21.8	12.7	58
National Geographic+	7.1	11.4	161
Sportsnet National+	42.9	11.1	26
Food Network+	17.7	10.4	59
Much+	16.1	9.4	58
Investigation Discovery+	6.7	8.0	119
Teletoon Eng+	7.1	7.7	108

Kids Specialty Network Ranker

Tuesday, March 17, 2020

Kids 2-11

Stations	STD (M-Su 2a-2a)	Overnight	Index (Day vs STD Avg)
	12/30/2019 - 3/8/2020	3/17/2020	
YTV+	11.2	23.1	206
Treehouse+	15.6	22.5	144
Teletoon Eng+	6.3	8.9	141
Family Jr+	5.5	8.0	145
Family+	3.7	7.6	205
Disney Eng+	3.6	7.4	206
Disney JR+	8.8	7.0	80
CHRGD+	0.8	1.4	175
Disney XD+	0.6	1.0	167
Nickelodeon+	0.5	0.6	120
Cartoon Network+	0.6	0.6	100

News grew exponentially

Evidence of co-viewing and possibly kids taking over screens or just adults also looking for an escape far from news?

Further changes to be seen as FREE access to Specialty now available from BDU's.

*Note that the situation is evolving – these should be treated as early indicators

Audiences Shifted



Local Weekend Snapshot

Thurs – Mon (Mar 12-16) vs 6 week average AMAs

Early indicators

Unsurprisingly News saw a dramatic AMA increase in the period Global outpaced the category*!

Calgary News Analysis (Mar 12 to 16, 2020) unconfirmed data

ALL NEWS	
A18+	A25-54
Index (last wk vs 6 wk avg.)	Index (last wk vs 6 wk avg.)
133	149

GLOBAL NEWS	
A18+	A25-54
Index (last wk vs 6 wk avg.)	Index (last wk vs 6 wk average)
138	143

*Note that the situation is evolving – these should be treated as early indicators

Source: Calgary EM, NewsTV A18+; A25-54 - 3/12/2020 to 3/16/2020 versus average 1/30/2020 to 2/3/2020, 2/6/2020 to 2/10/2020, 2/13/2020 to 2/17/2020, 2/20/2020 to 2/24/2020, 2/27/2020 to 3/2/2020, 3/5/2020 to 3/9/2020

Total TV is showing some modest growth, Corus saw massive gains across all time periods*

	Dayparts >>	M-Su 2a-2a	Prime (6pm to 11pm)	Fringe (6a-6p)
Audiences	Stations	Index (vs 6 wk avg.)	Index (vs 6 wk avg.)	Index (vs 6 wk avg.)
A18+	Total TV	101	93	105
	Global Calgary (CICT/CISA)+	135	153	116
A25-54	Total TV	100	92	105
	Global Calgary (CICT/CISA)+	131	154	100

Prime is indicating
the most dramatic
growth within Calgary

*Note that the situation is evolving – these should be treated as early indicators

Source: Calgary EDM, A18+; A25-54 - 3/12/2020 to 3/16/2020 versus average 1/30/2020 to 2/3/2020, 2/6/2020 to 2/10/2020, 2/13/2020 to 2/17/2020, 2/20/2020 to 2/24/2020, 2/27/2020 to 3/2/2020, 3/5/2020 to 3/9/2020

Continued to dominate locally on key news days

Calgary

Thursday, March 12, 2020

Program	Channel	Start time	A25-54 Rtg%	A25-54 Rank
GLOBAL NEWS HOUR	Global Calgary	17:59	3.3	1
GLOBAL NATIONAL	Global Calgary	17:30	3.3	1
GLOBAL NEWS AT 11	Global Calgary	23:00	1.8	3
BIG BROTHER CANADA	Global Calgary	21:00	1.8	3
GLOBAL NEWS AT 5	Global Calgary	16:59	1.7	5
CTV EVENING NEWS	CTV Calgary (C)	18:00	1.7	5
GREY'S ANATOMY	CTV Calgary (C)	22:00	1.4	7
CTV LATE NEWS	CTV Calgary (C)	23:30	1.3	8
CTV NEWS AT FIVE	CTV Calgary (C)	17:00	1.2	9
ET CANADA	Global Calgary	19:00	1.2	9
STATION 19	CTV Calgary (C)	21:00	1.1	11

Source: Numeris Overnight television ratings, Calgary EM

Albertan's trust Global News as their source of NEWS on the day Trump announced closure of border to travelers around the world, Sports suspends season, WHO and ministers (Canada & Alberta) continue with daily updates & new safety protocols.



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Total Calgary Radio AMAs witnessed a small decline versus the avg.
Corus Radio outpaced the market with *growth**

Audiences >>	A18+	A25-54
Stations	Index	Index
Total Radio	96	91
Corus Calgary	116	110

Audiences >>	A18+	A25-54
Stations	Index	Index
Q107	152	133
Global News Radio 770	123	131
Country 105	86	75

*Note that the situation is evolving – these should be treated as early indicators

Source: Calgary EM, A18+; A25-54 - Last week (March 12 to 16, 2020 Thurs to Mo 5a-1a) vs 6 weeks prior (Jan 30 - Mar 9, 2020 Thurs to Mo 5a-1a)

Thank you!

