SPECIAL STREAMING WARS EDITION

THE NIELSEN TOTAL AUDIENCE REPORT

FEBRUARY 2020

PETER KATSINGRIS, SVP
AUDIENCE INSIGHTS

In the modern history of entertainment, there have been a few revolutionary moments—the advent of the phonograph, the birth of the moving image, sound and colorization in movies, rock and roll, the remote control, hip-hop and the rise of cable networks so we can all tune into SportsCenter, The Sopranos and SpongeBob.

But make no mistake, the proliferation of on-demand streaming services is the most profound media disruption of the last half-century. And this disruption is driving real, actionable opportunity across all facets of the industry.

Direct-to-consumer streaming hasn't just changed the way consumers engage with, choose, and pay for content. It has also upended the type of content they yearn for, lean into, and champion. Streaming video and audio has altered deeply ingrained habits and helped prompt consumers to do something unfathomable just a few years ago—expand their time spent with media. With so much content available, consumers now spend about a day more per week engaged with it than they did just six years ago. That presents a significant marketing opportunity for providers and brands that respect individuals as consumers with unique spending, watching and listening habits.

So here we are, at the flash point of the "streaming wars," with an array of new subscription and ad-supported platforms seeking to capitalize on what is a massive global opportunity for consumer attention and value.

There will no doubt be casualties of this combat for attention and eyeballs. Will established players with large budgets and vast content libraries continue to win the fight for consumers' respective evenings and command the lion's share of viewing? Will nascent platforms, including those we don't even know yet, create new consumer experiences and emerge as victors? If you're part of this industry, how will your strategies help capitalize on the multitude of these opportunities and how are you using data to do so?

You might already sense that this isn't your typical Nielsen Total Audience Report. It's not. This is a special "streaming wars" takeover edition, focusing on how much content exists in the viewing ecosystem (using Gracenote data for the first time), how much time consumers spend using streaming services on the television set (via our Streaming Meter), and a look at what drives consumers' video, audio and streaming service choices.

Here is what I will leave you with: In 2019, global media spend was roughly $600 billion. By 2023, we expect digital media spend to top $500 billion globally and account for 60% of ALL media spend, which will be nearly *$1 trillion* at that point.

The winners of this battle for audiences and dollars will reap the spoils of that revenue opportunity. But to get there, they will need accurate metrics to help them plan, forecast and make informed decisions—decisions to drive their respective monetization models to success.

This is one of the rare occasions where we know with great certainty the big picture of our future. The power is in our hands to capitalize on it.

Thanks,

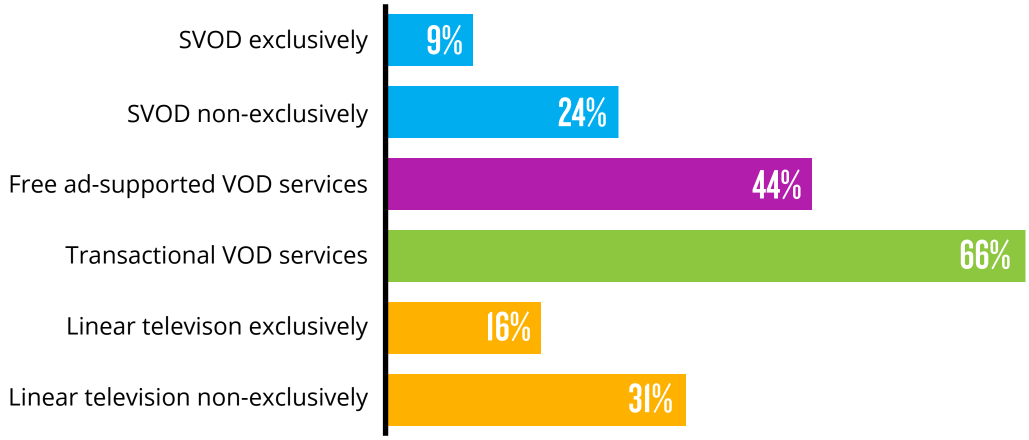
Peter

CONTENT FOR EVERYONE

The term “content is king” is thrown around a lot and, while true, little has been said about just how MUCH content exists in the viewing ecosystem—until now. Using Nielsen Gracenote’s data capabilities, for the first time we can provide some clarity: Through December 2019, U.S. consumers had access to 646,152 unique program titles to choose from across linear and streaming services in 2019. This is nearly 10% more than all of 2018. Of those nearly 650,000 titles, about 9% of them were available exclusively via a subscription video on demand (SVOD) service. Another key takeaway for marketers is that ad-supported video services (AVOD) act as a great multiplier in terms of titles. Content available exclusively on linear services accounts for 16% of titles, but that almost doubles to 31% when linear titles simultaneously available on AVOD are included! That affords media owners multiple monetization opportunities and a better chance of finding their audience through their desired distribution points.

% OF TITLES DISTRIBUTED ACROSS LINEAR AND OTT STREAMING SERVICES

JANUARY 1, 2019 – DECEMBER 15, 2019



But streaming choices aren’t limited to video viewing. In addition to terrestrial radio, audio streaming offers consumers millions of titles to choose from, covering music to podcasts to books. And choice of service is less about where content is located and more about interface preference or where a device might be used.

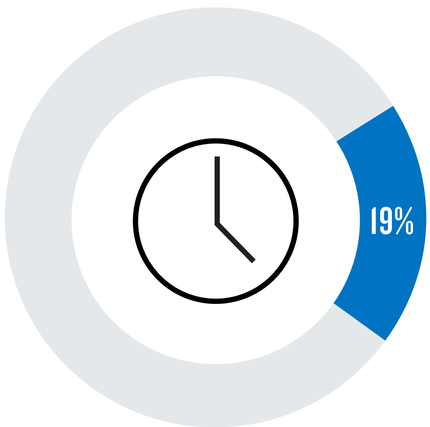
SO... HOW MUCH STREAMING IS REALLY BEING DONE?

In just a short amount of time, streaming has had a profound impact on us. Nearly one-fifth (19%) of the time consumers in OTT-capable homes are spending on the TV is going to streaming, be it ad-supported models or paid, subscription services. Yes, consumers really do vote with their evenings (and mornings and afternoons, too).

Across the range of choice among the different streaming platforms, one thing remains constant: change. As content moves from one platform to another and new offerings draw in viewers (and subscribers), shifts in where these consumers are going can swing rapidly, and in a pronounced fashion. One big space-themed franchise can nab viewers one month, but a different program on a different platform might steal the spotlight the next.

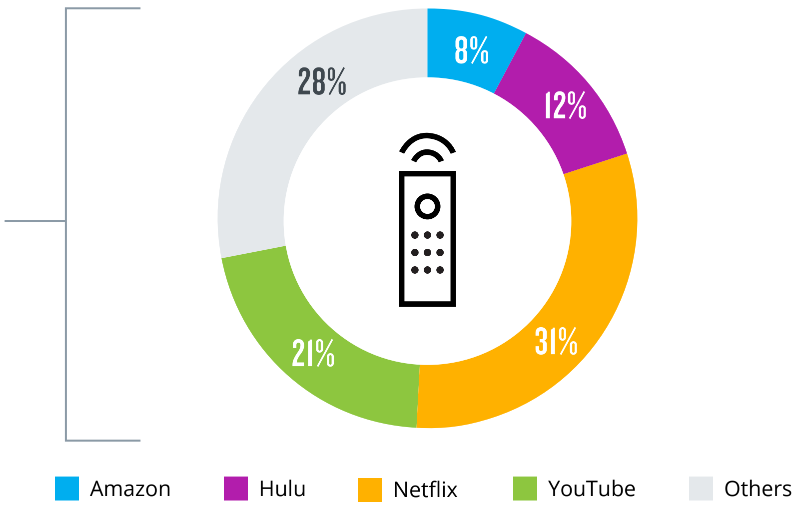
% OF STREAMING OUT OF TOTAL USAGE OF TV

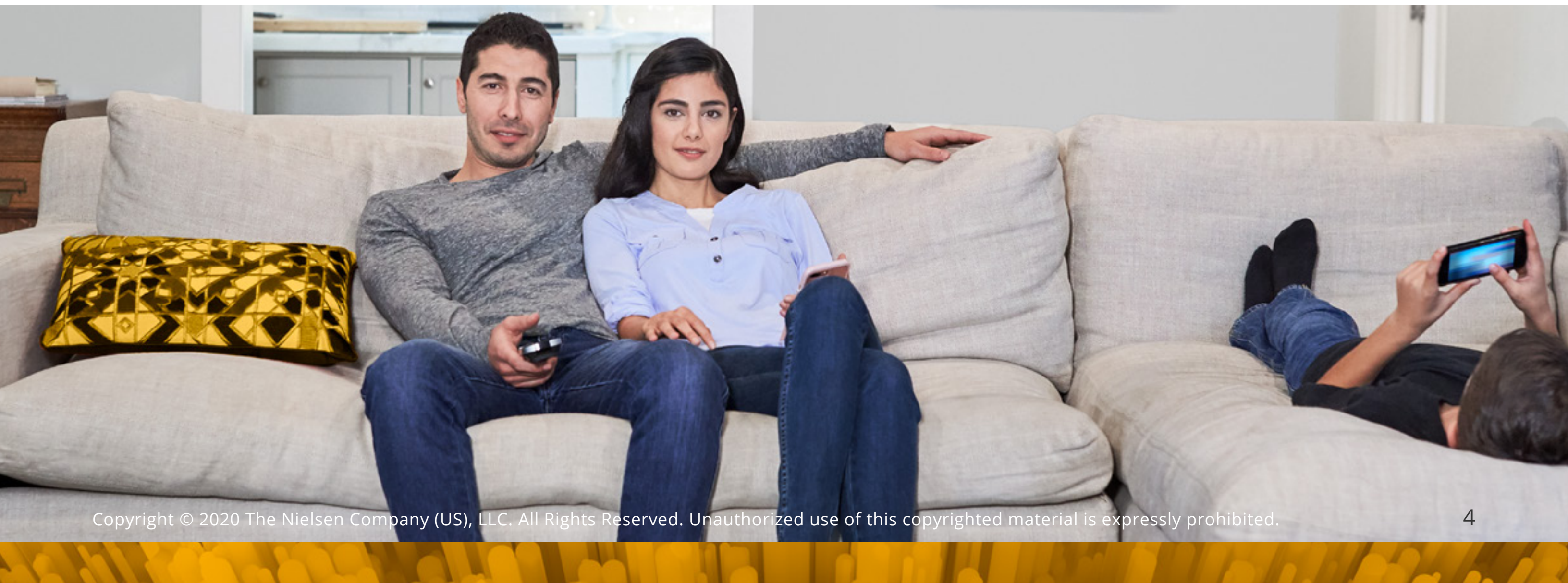
Q4 2019, A2+



VIDEO STREAMING DISTRIBUTION % BY BRAND

Q4 2019, A2+





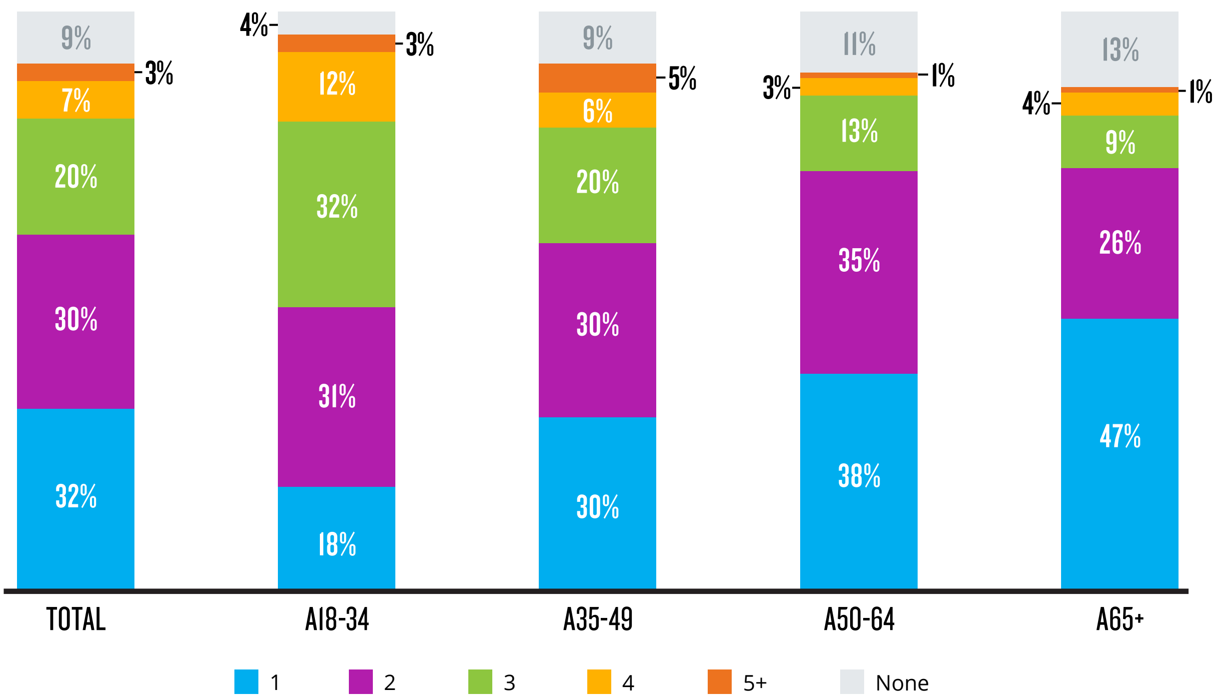
STREAMING SALVOS: THE FIGHT FOR THE CONNECTED CONSUMER

As the video streaming landscape evolves and the streaming wars heat up, questions have bubbled up about how consumers will react to an influx of new media services being brought to their virtual doorsteps. With more entertainment options available today than ever before, consumers are growing increasingly cost conscious. But at the same time, program "fandom" does hold a great deal of influence over their media preferences. This could help entice subscribers to engage with both nascent and established platforms.

But one big question remains: Will consumers tire of continually having to access new platforms and all that comes with it? That includes everything from signing up for a subscription and potentially paying a premium to downloading an app to getting familiar with a unique menu and learning how to navigate platform after platform.

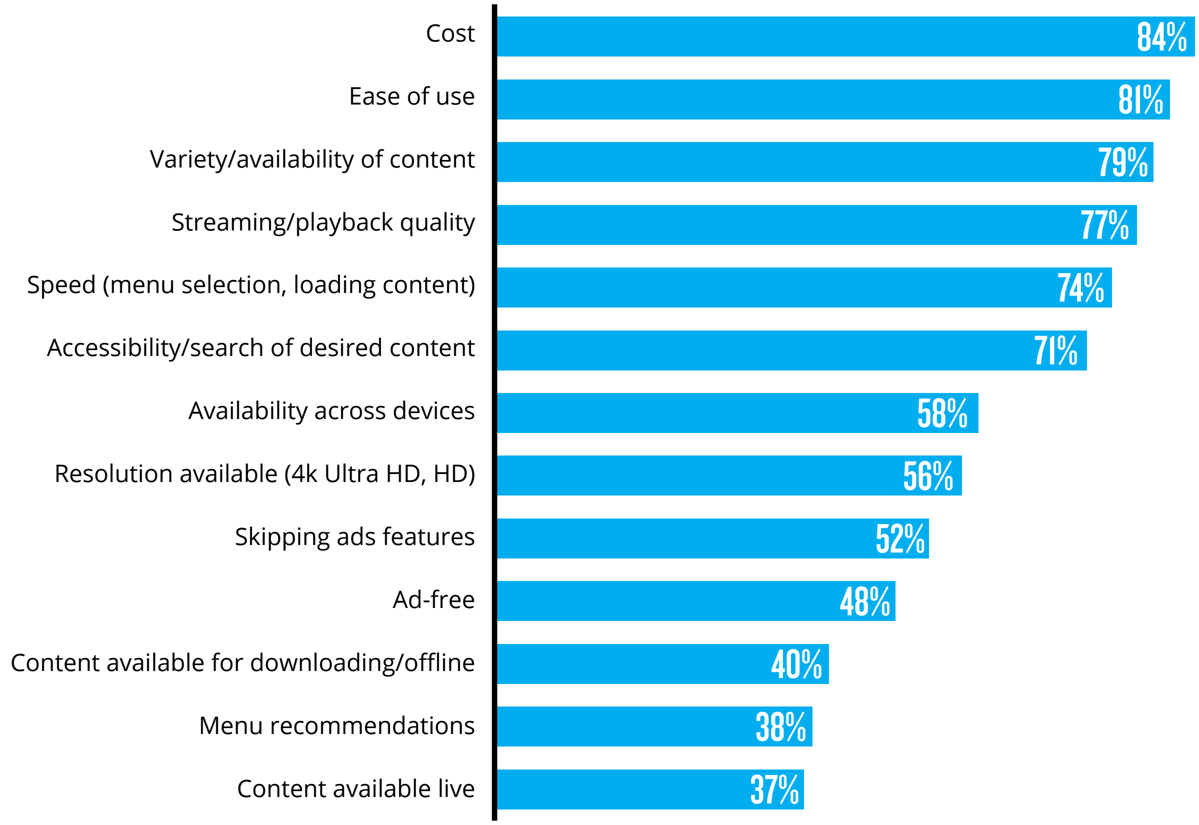
While it's an increasingly crowded field, the good news for content creators entering this market (as well as those already in the market) is that consumers are showing a willingness to subscribe to multiple paid services. A special survey into U.S. consumer sentiment toward streaming platforms that Nielsen conducted found that 91% of all respondents and a whopping 96% of respondents 18-34 subscribe to a paid streaming video service. Beyond that, there is still room to expand the number and variety of services, as nearly one-third of all respondents and almost half (47%) of respondents 18-34 say they currently subscribe to three or more paid services.

NUMBER OF PAID VIDEO SERVICES SUBSCRIBED TO



IMPORTANCE OF VIDEO STREAMING ATTRIBUTES

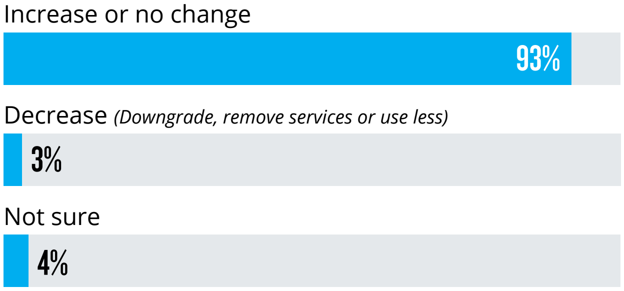
Top 2 Box (out of 5 - Extremely/Very Important)



Consumers are continually cost conscious throughout their daily lives, and that doesn't change when it comes to the incrementality of signing on for video streaming subscription "upgrades." After all, those services add up. The good news for the industry is that 93% of U.S. consumers say they will either increase or keep their existing streaming services. That places the burden of making content that viewers find value square on the shoulders of content creators and services. Keeping viewers loyal is also critical, so cost efficiency coupled with user-friendly interactivity and serving up a hearty helping of engaging content could be the difference between growth and attrition in this fast-evolving space. In short, make great content and subs will come; keep costs down and maybe they'll stay.

When looking at the attributes that consumers value the most, 84% of respondents said cost of services is extremely or very important, 81% noted that ease of use was of the same importance, and 79% of people noted that they value the variety or availability of the content in the same manner.

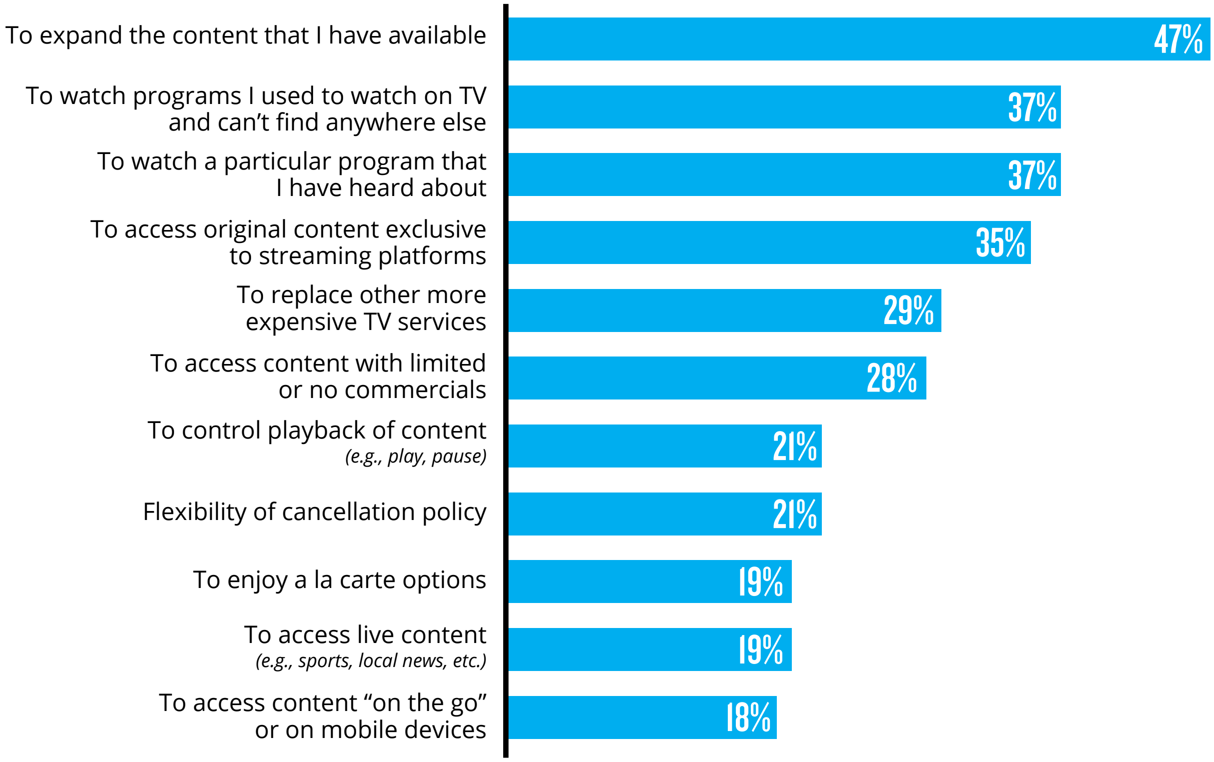
FUTURE ACTION OF PAID VIDEO STREAMING SUBSCRIBERS



NO SIGN OF STOPPING: 93% OF VIDEO SUBSCRIBERS PLAN ON AN INCREASE OR NO CHANGE TO THEIR STREAMING HABITS!

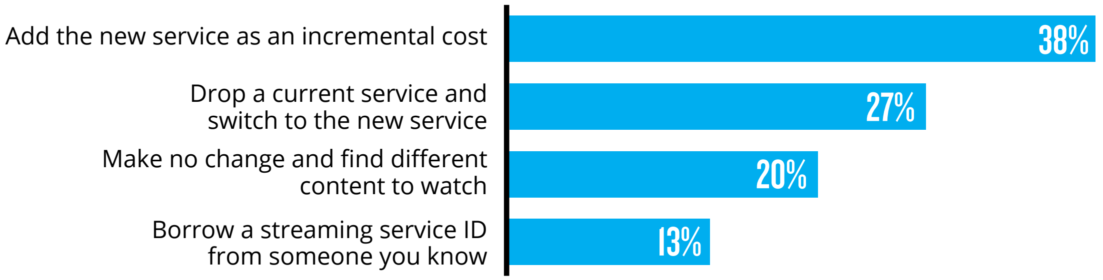
The primary force behind what drives consumers to subscribe to more services is no secret: It's the content. Our survey found that the top four reasons consumers crack open their respective wallets and subscribe to new streaming services are all content driven. Content creators hold a huge amount of sway over these decisions. Keep making compelling content and subs will be there... though the fight for these spenders will intensify as platforms proliferate.

REASONS FOR SUBSCRIBING TO ADDITIONAL PAID VIDEO STREAMING SERVICES



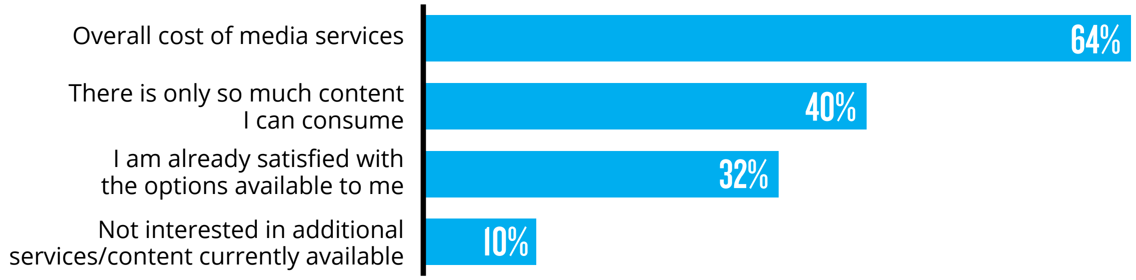
When taking on new paid video subscription services, 38% of consumers would elect to add to their existing libraries at an additional cost, 27% would drop a current subscription and trade in for a new experience and 13% would "sample" new content by borrowing an ID from someone they know.

ACTION TAKEN TOWARD AN ADDITIONAL PAID VIDEO STREAMING SERVICE



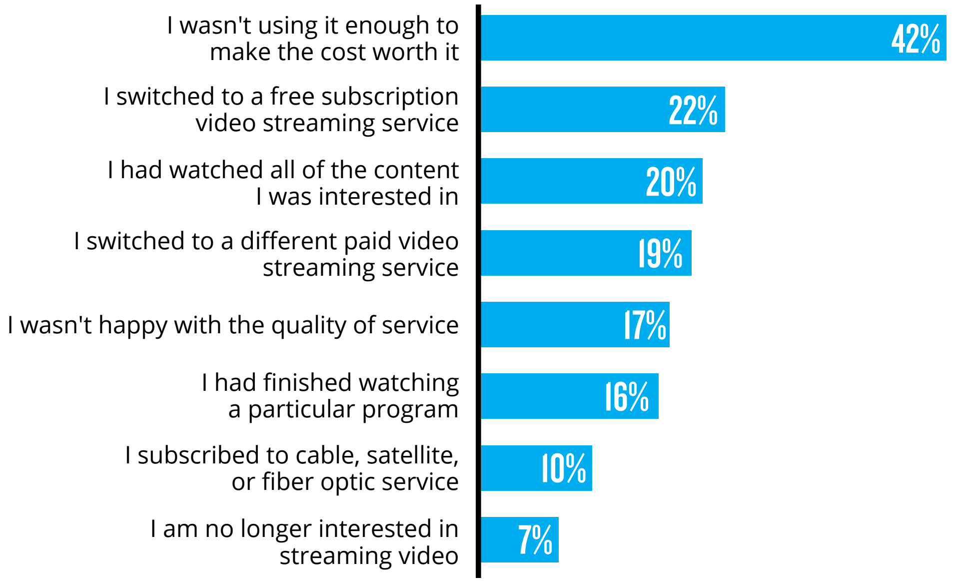
Among those open to subscribing to additional video services in the future, the age old classics of time and money—not interest—are the limiting factors. Nearly two-thirds cited the overall cost of media services, while 40% admitted there is only so much content they currently have time to consume. In this emerging space, there are also opportunities for key players to introduce new forms of content. Thirty-two percent are satisfied with their current offerings, while 10% would consider new services but are not seeing those needs currently met.

REASONS FOR LIMITING PAID VIDEO SERVICES SUBSCRIBED TO



Similar themes of time and cost consciousness are prevalent in the event that consumers cancel their services. Forty-two percent of respondents who cancelled a paid video service did so because they felt they weren't using it enough to make the cost worthwhile. Of course, once someone chooses to subscribe their loyalty is not guaranteed in perpetuity; the onus is on providers to continue offering compelling content on their platform. Twenty percent cancelled because they watched all available content they were interested in. Sometimes people even subscribe to watch one program in particular, and 16% cancelled after viewing the only piece of content they were interested in. Another thing for brands and marketers to monitor going forward is the emergence of free, ad-supported distribution models. Twenty-two percent cancelled their paid service because they decided to switch to a free service instead.

REASONS FOR CANCELLING PAID VIDEO SUBSCRIPTION SERVICE

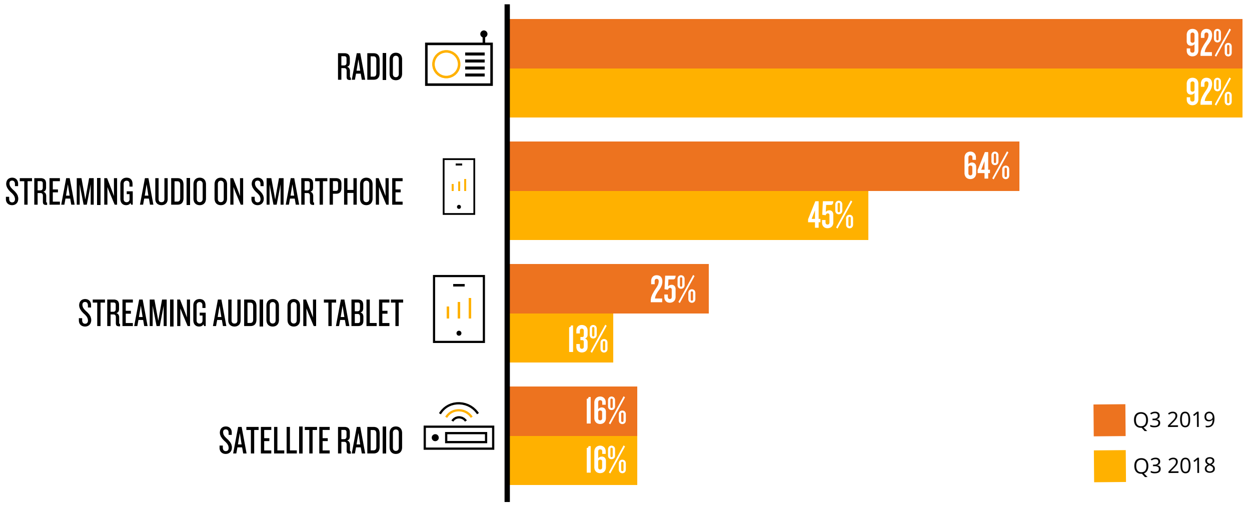


THE AUDIO UNIVERSE

Radio remains the centerpiece of the audio universe, reaching more U.S. adults each week, at 92%, than any other media platform. At the same time, consumers complement their radio use, with nearly two-thirds of adults (64%) streaming audio through smartphones and one-fourth of adults streaming audio through their tablets.

COMPARABLE METRICS - WEEKLY REACH OF AUDIO AMONG ADULTS 18+

BASED ON TOTAL U.S. POPULATION

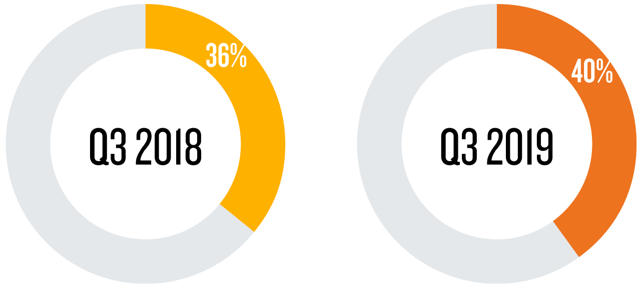


ON THE GO: 64% OF ADULTS STREAM AUDIO THROUGH THEIR SMARTPHONES EACH WEEK

Smart speakers, which specialize in delivering audio content, are now found in 29% of U.S. households. 'Voice' is quickly becoming synonymous with 'audio' for many consumers; voice assistants are now used by 40% of adults and are expanding into more places both in and out of the home.

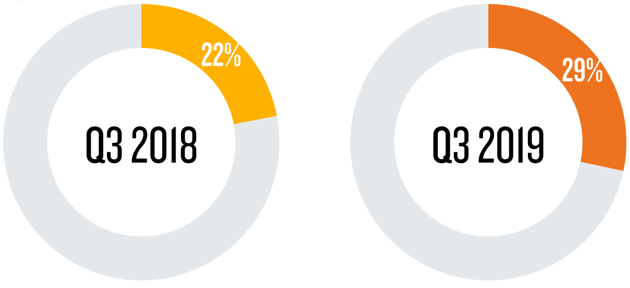
VOICE ASSISTANT REACH

BASED ON TOTAL U.S. POPULATION 18+

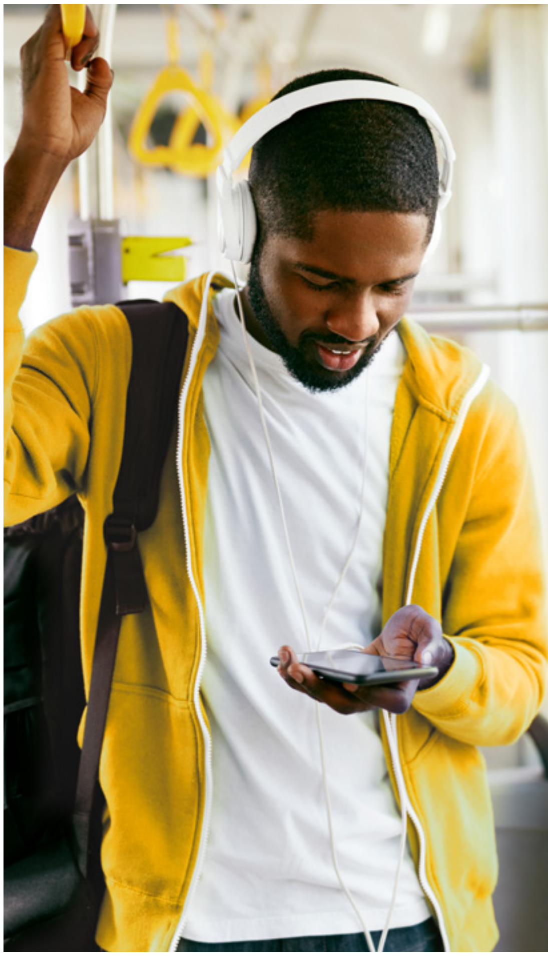


SMART SPEAKER PENETRATION

BASED ON U.S. HOUSEHOLDS



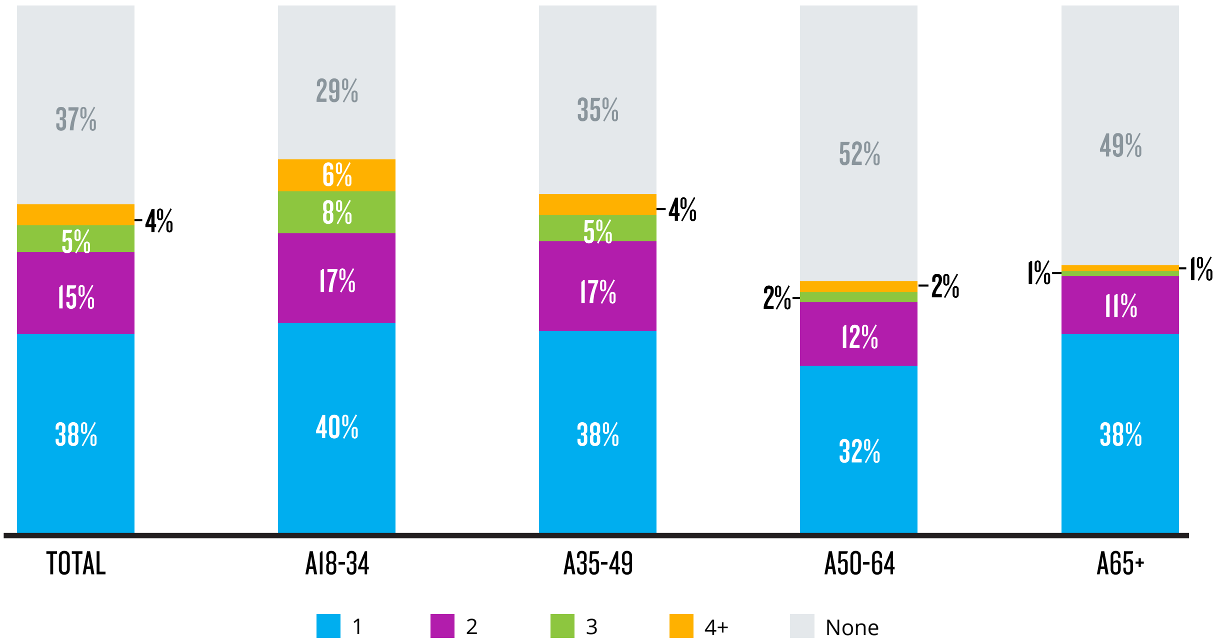
SOUNDING OFF ON AUDIO STREAMERS



There is really no denying consumers' love of music and reliance on radio for what has been ingrained in our DNA nearly since the dawn of time—primordial rhythm, sound and auditory excitement. While broadcast radio is thriving as the leading reach vehicle in the U.S., consumers are complementing their listening with streaming services, though unlike video streaming services where content is often exclusive to platforms, music streaming service content often overlaps in terms of artists, songs and titles.

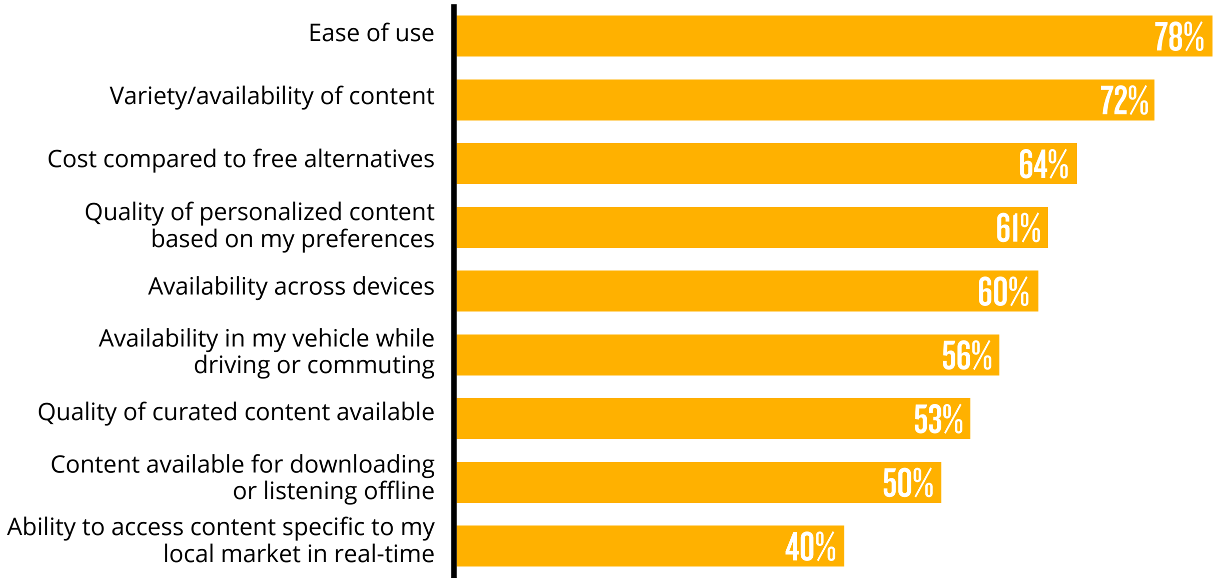
A Nielsen custom survey into U.S. consumer sentiment toward streaming platforms (which powers the insights on the next three pages) found one of the biggest differences between audio and video streamers is that the audio set places a greater emphasis on free, ad-supported services. This is due in no small part to radio's legacy as the original free audio medium. With that said, nearly two-thirds of respondents (63%) noted that they pay for at least one audio streaming subscription, and over half (53%) pay for two. These services offer something for listeners of all ages, and the differences across generations are not as substantial as one might expect. Unsurprisingly, adults 18-34 are most likely to subscribe to paid audio services and are most likely to have several subscriptions, and approximately half of all respondents over 50 also have access to at least one paid service.

NUMBER OF PAID AUDIO STREAMING SERVICES SUBSCRIBED TO



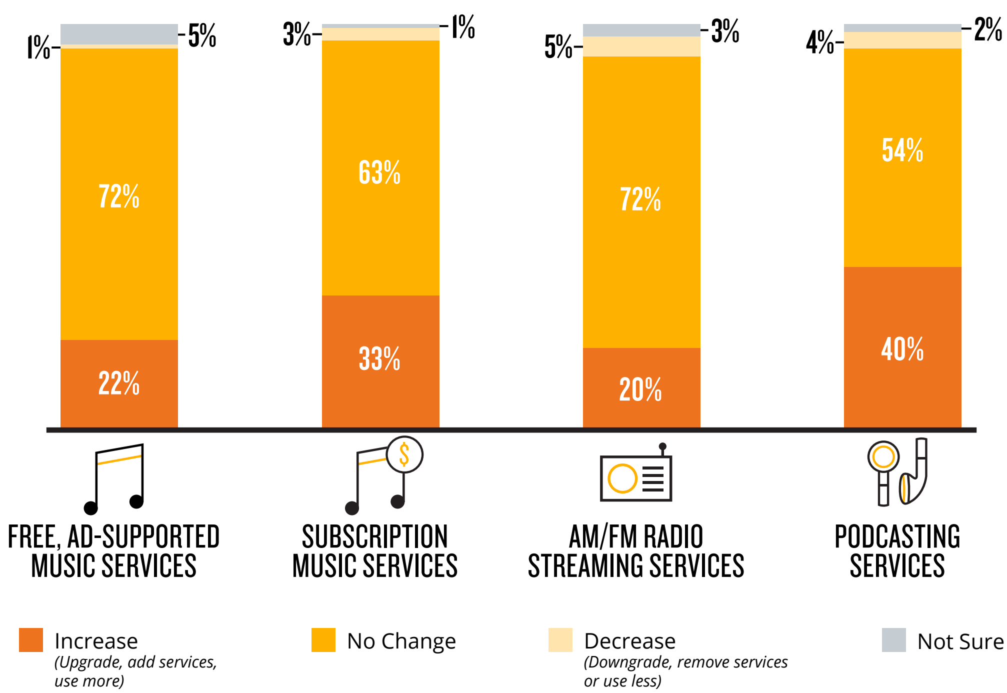
IMPORTANCE OF AUDIO STREAMING ATTRIBUTES

Top 2 Box (out of 5 - Extremely/Very Important)

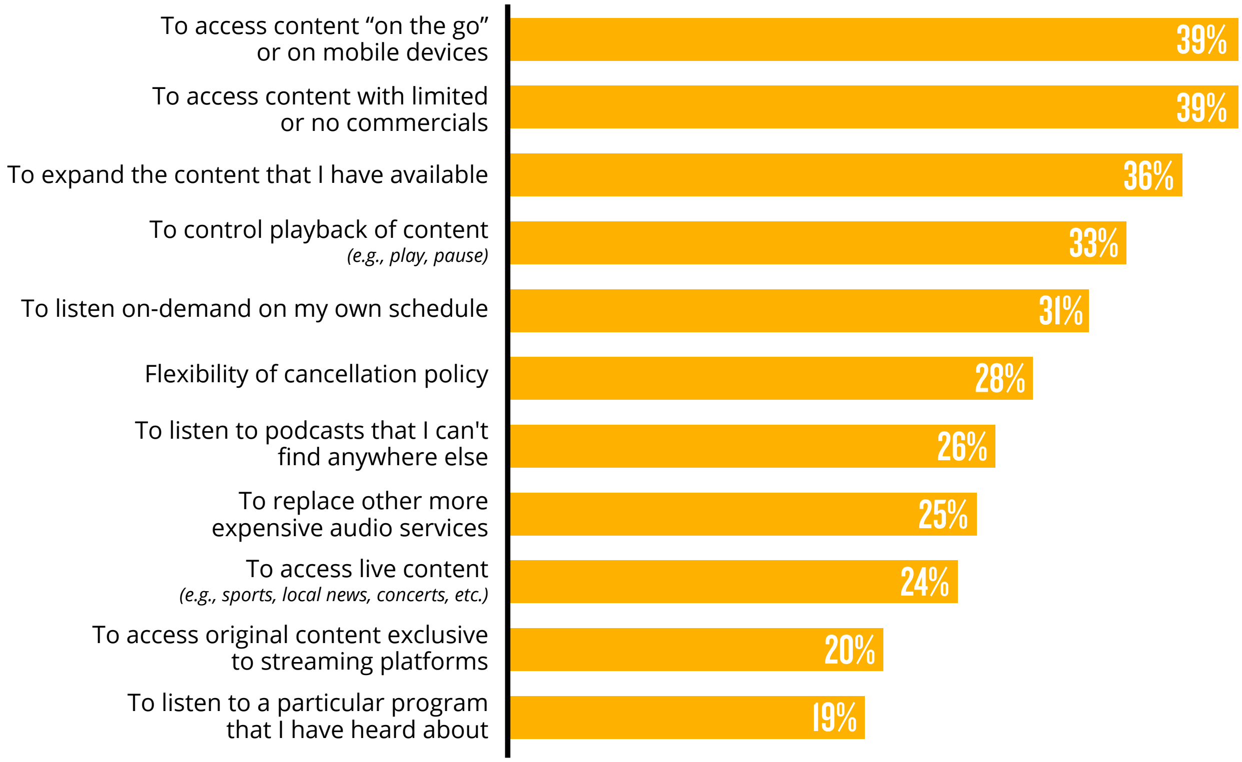


Let's face it, after decades of relying on the nearly perfect and utilitarian design of a radio dial, audio consumers are used to accessing content in a seamless manner. When it comes to paid audio streaming, they demand the same ease of use. Our special streaming consumer survey revealed that over three-quarters of respondents (78%) said that ease of use was extremely or very important to them in regard to audio streaming services—the highest of any reason—followed by the variety of content (72%) and cost compared to their free options (64%).

FUTURE ACTION OF AUDIO STREAMING SERVICE USERS

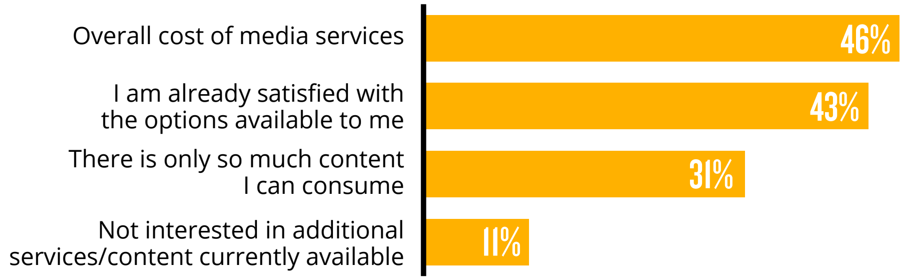


REASONS FOR SUBSCRIBING TO ADDITIONAL PAID AUDIO STREAMING SERVICES



Another habitual consumer behavior is accessing audio en route and on-the-go. After all, driving while listening to the radio remains one of the most smitten matches made in heaven between humans and technology. It’s no different with audio streaming. In fact, 39% of consumers said they would consider adding new paid streaming audio services to access on-the-go or mobile options, while 46% of respondents said the cost of these services could limit adding on audio services.

REASONS FOR LIMITING PAID AUDIO SERVICES SUBSCRIBED TO



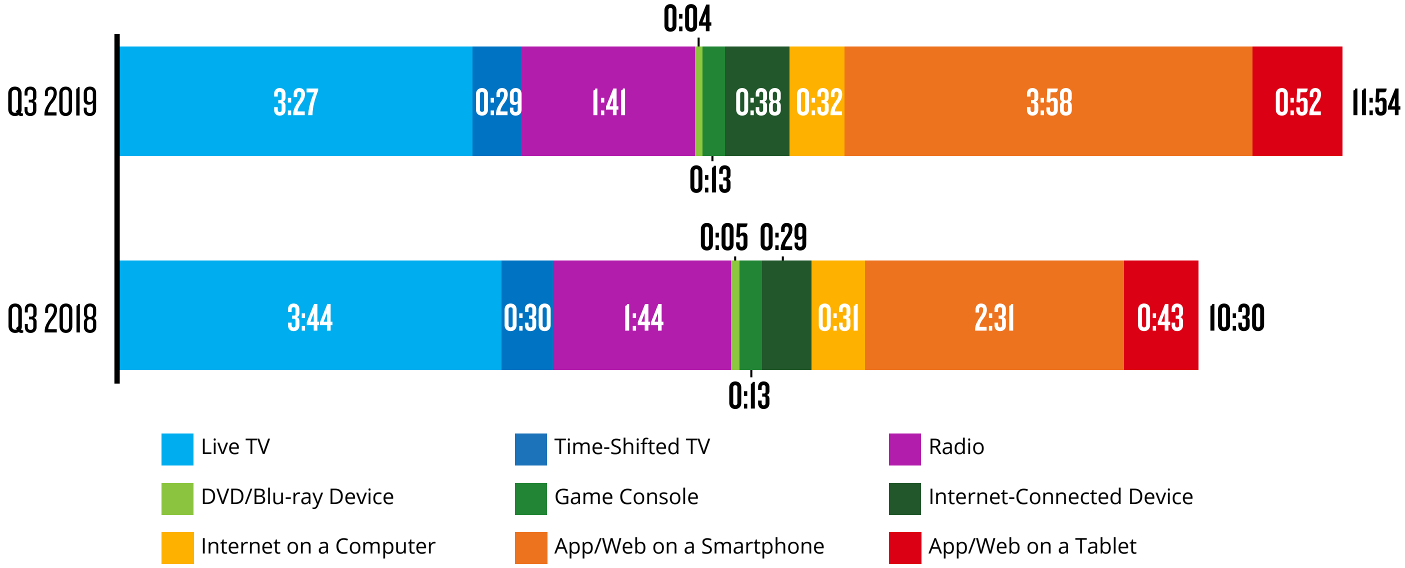
MEDIA CONNECTED CONSUMERS

It might be easy to be wowed by our total media consumption each day: nearly 12 hours across TV, TV-connected devices, radio, computers, smartphones and tablets. That's 1 hour and 24 minutes of additional media exposure across all platforms from third-quarter 2018, which was driven by smartphone usage. That is a great amount of the waking day for consumer connectivity, so this amount of time is especially eye-opening. Marketers and content creators have literally every waking hour of a consumers' day to put forth their best messages. But as devices continue to gain ground and non-ad supported streaming models go to market, buyers and sellers of media need a different coda of thinking to reach these consumers. Could it be branded integrations, which is projected to be a $20 billion global industry by 2021? Or perhaps it will be target advertising, which accounted for nearly $80 billion in media spend in 2019 alone.

OCCASIONALLY THEY SLEEP: U.S. ADULTS SPEND HALF OF THEIR DAY CONNECTED TO MEDIA!

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION

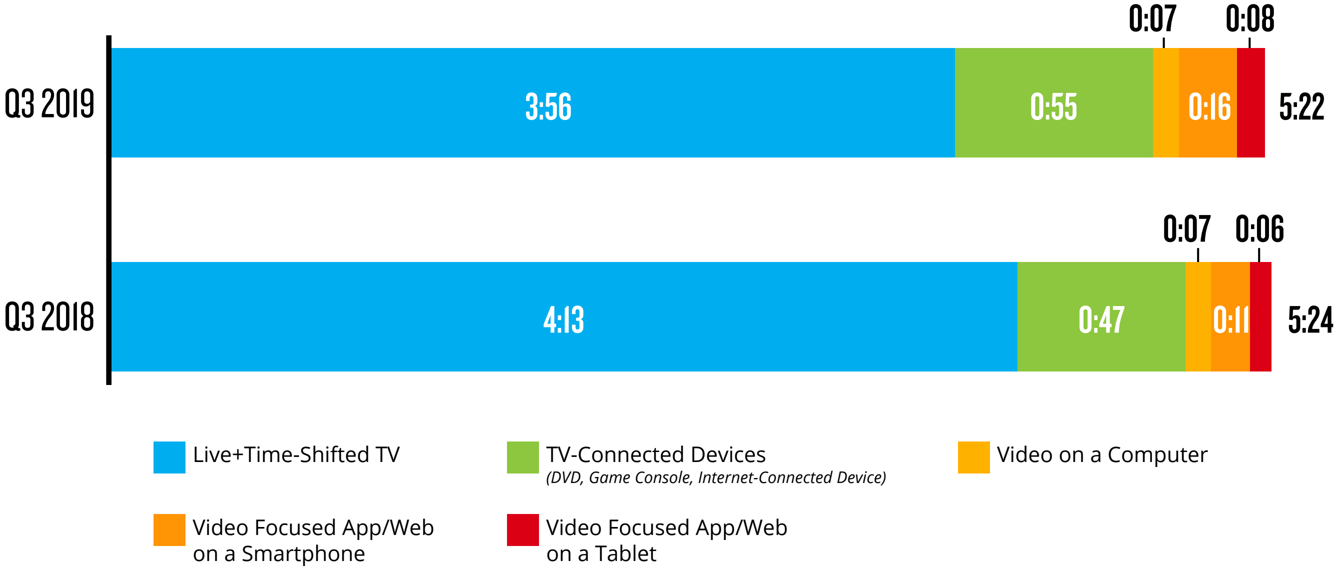


Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage. Measurement enhancements to the mobile panel in the past year contributed to increases in usage levels beyond pure organic growth.

It's simple: As traditional sources for content wane, technological advancements have buoyed the loss and kept consumers tuning in, albeit in a slightly different manner. Looking JUST at video sources, TV-connected devices continue a marked upswing in consumer time spent—an average daily increase of 8 minutes from the same time period in 2018. Considering these devices are super enablers for direct-to-consumer video services, both ad-supported and non, expect to see more individualized streaming platforms launch.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

BASED ON TOTAL U.S. POPULATION



WEEKLY REACH ACROSS PLATFORMS

For brands and marketers looking to reach a mass audience, the traditional linear platforms of TV and radio still present the opportunity to broadcast your message to the greatest number of people. Radio reach has remained steady and is the highest across all platforms at 92%, including 96% among Hispanic adults. Live+time-shifted TV reach declined to 84% in third-quarter 2019 from 86% a year ago, as the reach of internet-connected devices to the TV glass grew to 44% from 38%. These connected devices are enabling and encouraging a shift from traditional to streaming, and as the connected TV becomes the new normal, so will streaming.

Q3 2019 WEEKLY REACH % OF USERS 18+ AMONG U.S. POPULATION

Platform	Total	Black	Hispanic	Asian American	White
LIVE+TIME-SHIFTED TV	84%	87%	83%	67%	85%
YOY Change	-2%	-2%	-3%	-3%	-2%
RADIO	92%	91%	96%	NA	89%
YOY Change	0%	-2%	-1%	NA	0%
DVD/BLU-RAY DEVICE	11%	8%	8%	7%	12%
YOY Change	-2%	-3%	-2%	-2%	-2%
INTERNET ON A COMPUTER	55%	47%	43%	63%	56%
YOY Change	-2%	0%	0%	2%	2%
GAME CONSOLE	14%	15%	16%	10%	14%
YOY Change	-1%	0%	-1%	-1%	-1%
APP/WEB ON A SMARTPHONE	85%	86%	86%	88%	85%
YOY Change	5%	5%	4%	5%	5%
INTERNET CONNECTED DEVICE	44%	42%	46%	49%	43%
YOY Change	6%	8%	5%	4%	6%
APP/WEB ON A TABLET	46%	44%	43%	51%	47%
YOY Change	1%	1%	2%	1%	1%

Total | Black | Hispanic | Asian American | White | YOY Change

Radio measurement includes Asian Americans but cannot be separated from the total audience at this time.
Radio measurement for White is inclusive of non-Black and non-Hispanic.

MEDIA TIME BY DEMOGRAPHIC

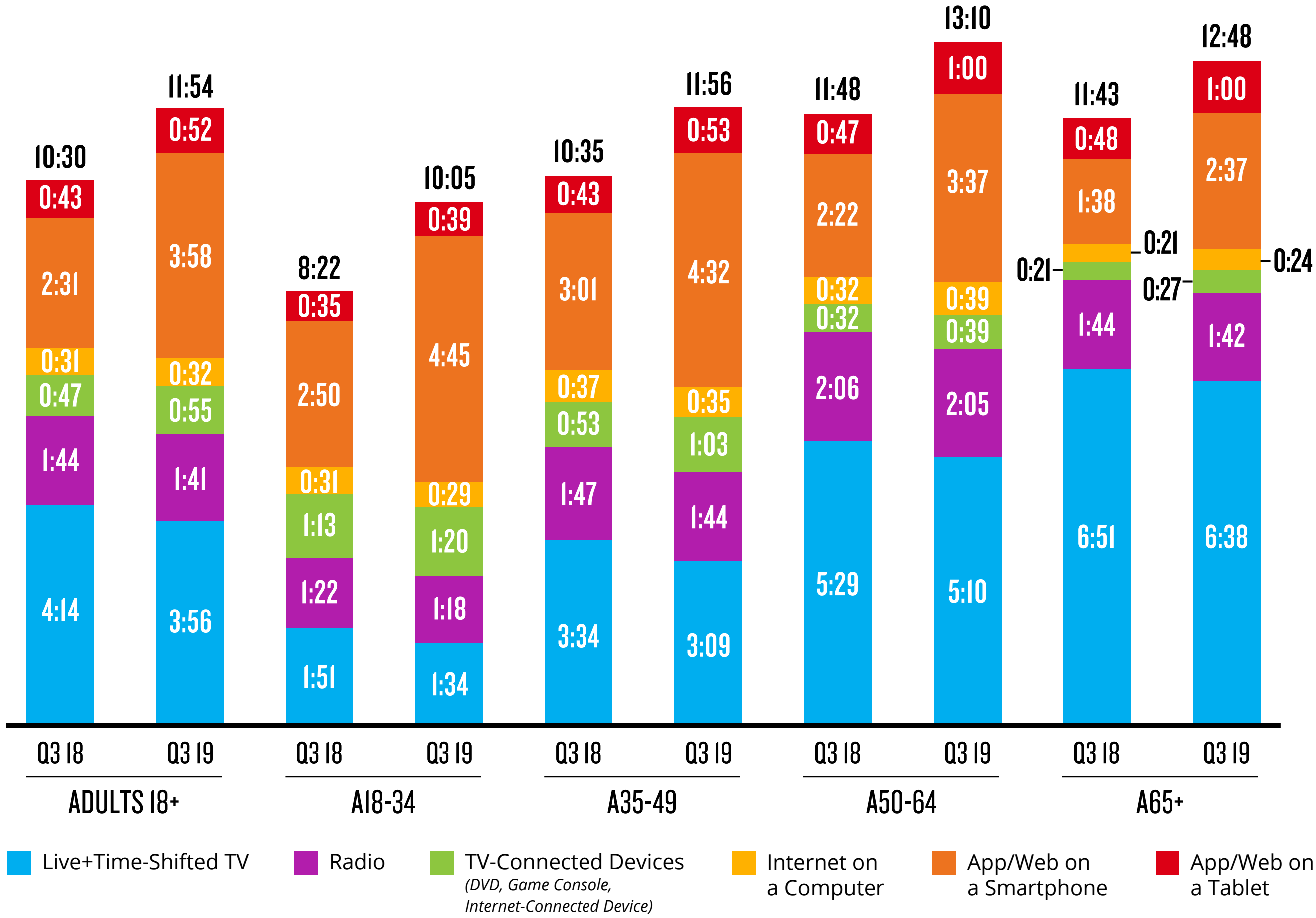
It shouldn't be a surprise that individuals' media habits shift as they progress through the various stages of their lives. Younger adults 18-34 access devices differently than senior citizens, for example, at different times of the day and often from different locations. The great challenge for marketers is to pinpoint a strategy that most effectively reaches the desired target audience, through their preferred platform, and in an effective manner.

Adults 18-34 are spending more time than any other age group with smartphones, at 4 hours and 45 minutes per day. They also spend an additional one hour and 20 minutes on TV-connected devices, seven minutes more per day than the year prior. Adults 35-49 are also becoming increasingly digital, as they now spend six hours per day across computers, smartphones, and tablets. Adults 50-64 still spend more time with media than any other group, at 13 hours and 10 minutes per day.

ADULTS 18-34 ARE GLUED TO THEIR SMARTPHONES FOR 4 HOURS AND 45 MINUTES PER DAY

DAILY HOURS:MINS OF USAGE

BASED ON TOTAL U.S. POPULATION

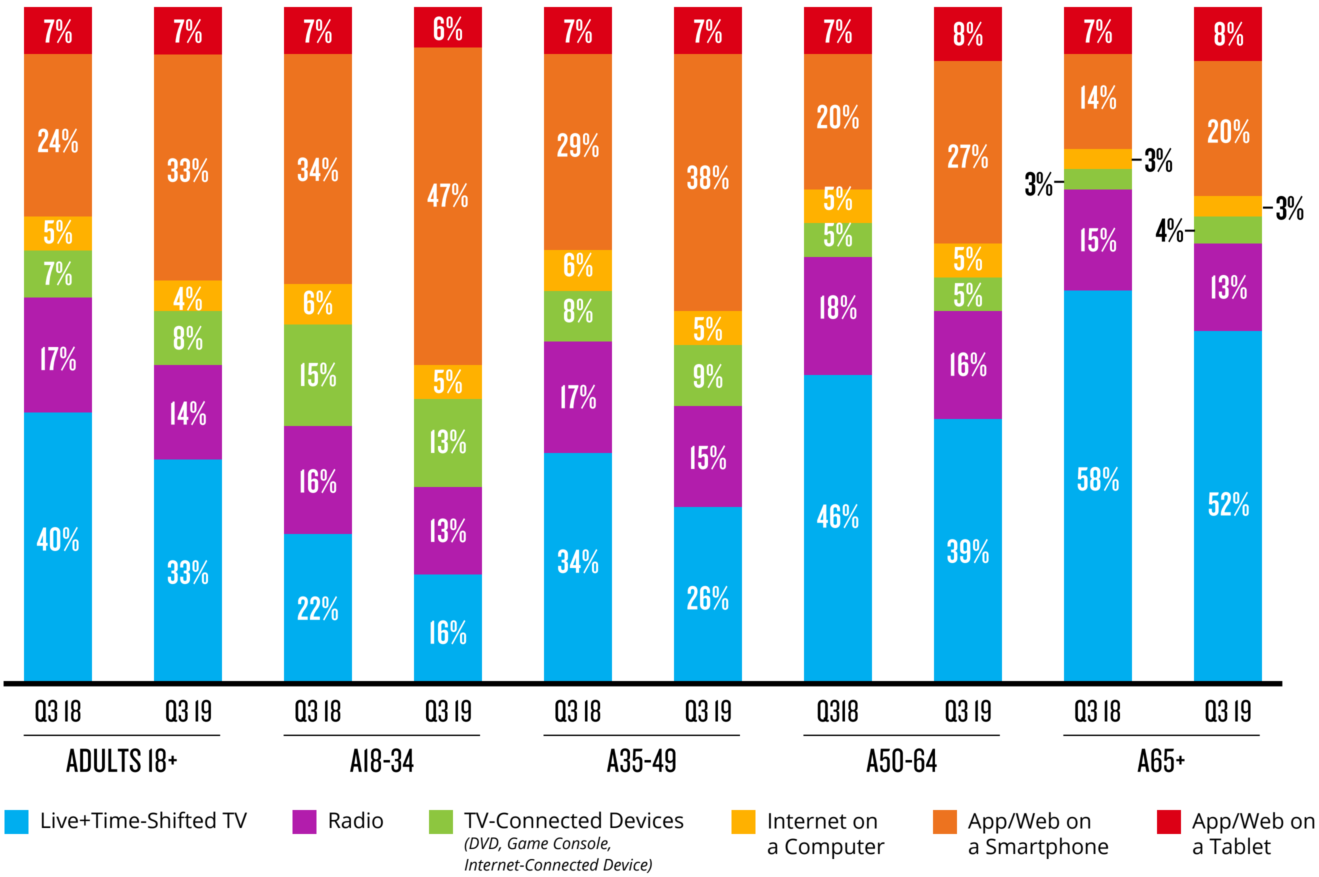


Viewing media usage through the lens of share of time spent on each platform reveals a continued shift toward digital device usage. Adults 18-49, who comprise the majority of the workforce and are a key demographic for marketers, are spending more than half of their overall media time per day on computers, smartphones and tablets. Adults 50-64, who are the largest consumers of all media, are still spending 40% of their time on digital platforms and 44% with the TV glass on live+time-shifted TV and TV-connected devices.

YOUNG ONES: OVER HALF OF TIME SPENT WITH MEDIA FROM ADULTS 18-34 IS SPENT ON A MOBILE PHONE OR TABLET!

SHARE OF DAILY TIME SPENT BY PLATFORM

BASED ON TOTAL U.S. POPULATION



THE MULTICULTURAL CONSUMER

Understanding and embracing diversity is an essential component of connecting with media users from all backgrounds. Every individual's specific media consumption is highly personalized, but when examining people of differing racial and ethnic backgrounds some common traits begin to surface. Most notably, growth and expansion are themes that seem to transcend race or ethnicity. Black, White, Hispanic and Asian American adults all increased their total media consumption across all platforms compared to the year prior.

Black adults continue to spend the most time overall with media at 14 hours and 26 minutes per day, which is 21% more time than the average adult. They spend more time than any other group with live TV at 5 hours and 4 minutes and smartphones at 4 hours and 46 minutes per day.

While there are differences in media habits among different types of consumers, nearly all groups are leveraging internet-connected devices more than ever. Daily internet-connected device usage among Asian American and White consumers increased by 8 minutes per day, Hispanics by 7 minutes, and Blacks by 15 minutes per day compared to the prior year's quarter. Marketers and content creators would be wise to take note of these evolving habits and tailor their offerings to reflect these shifts in usage.

GOING DIGITAL: 47% OF HISPANIC TIME SPENT IS ON COMPUTERS, SMARTPHONES AND TABLETS

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	Q3 2018	Q3 2019	Q3 2018	Q3 2019	Q3 2018	Q3 2019	Q3 2018	Q3 2019	Q3 2018	Q3 2019
Live TV	3:44	3:27	5:31	5:04	2:45	2:29	1:51	1:42	3:41	3:26
Time-shifted TV	0:30	0:29	0:30	0:29	0:17	0:16	0:14	0:13	0:32	0:31
Radio	1:44	1:41	1:49	1:46	1:49	1:43	NA	NA	1:41	1:39
DVD/Blu-ray Device	0:05	0:04	0:06	0:04	0:04	0:03	0:03	0:03	0:05	0:04
Game Console	0:13	0:13	0:16	0:16	0:13	0:12	0:08	0:07	0:13	0:12
Internet Connected Device	0:29	0:38	0:32	0:47	0:32	0:39	0:34	0:42	0:28	0:36
Internet on a Computer	0:31	0:32	0:28	0:23	0:23	0:20	0:38	0:40	0:32	0:34
App/Web on a Smartphone	2:31	3:58	3:02	4:46	2:35	4:08	2:35	3:56	2:25	3:49
App/Web on a Tablet	0:43	0:52	0:44	0:51	0:39	0:44	0:43	0:55	0:43	0:53
Total	**10:30**	**11:54**	**12:58**	**14:26**	**9:17**	**10:34**	**6:46***	**8:18***	**10:20**	**11:44**

*Radio measurement includes Asian Americans but cannot be separated from the total audience at this time.
Radio measurement for White is inclusive of non-Black and non-Hispanic.

DATA TABLES

At Nielsen, data drives everything we do—even art. That’s why we used real data to create this image.

Q3 2019 WEEKLY TIME SPENT IN HOURS: MINUTES AMONG U.S. POPULATION

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+	WHITE 18+
Total Use of Television	33:47	20:20	29:18	40:44	49:37	24:23	28:17	46:40	25:35	19:34	33:41
Live+Time-Shifted TV	27:26	11:01	22:00	36:08	46:27	15:59	20:26	38:46	19:14	13:29	27:38
Time-Shifted TV	3:20	1:18	3:08	4:32	5:00	2:08	2:45	3:21	1:52	1:32	3:39
TV-Connected Devices	6:21	9:19	7:18	4:36	3:09	8:24	7:51	7:55	6:22	6:05	6:03
DVD/Blu-ray Device	0:28	0:22	0:31	0:32	0:27	0:26	0:29	0:28	0:21	0:20	0:28
Game Console	1:29	3:24	1:27	0:24	0:08	2:31	1:52	1:55	1:27	0:51	1:25
Internet Connected Device	4:24	5:33	5:20	3:40	2:34	5:27	5:30	5:31	4:34	4:55	4:10
Radio	11:48	9:06	12:09	14:33	11:51	10:29	11:43	12:22	12:04	na	11:32
Internet on a Computer	3:43	3:23	4:02	4:34	2:47	3:41	4:03	2:41	2:19	4:42	3:55
Social Networking	0:35	0:27	0:36	0:51	0:29	0:31	0:37	0:17	0:16	0:44	0:39
Video on a Computer	0:52	1:09	1:01	0:51	0:21	1:06	1:04	0:50	0:38	1:12	0:52
App/Web on a Smartphone	27:43	33:14	31:43	25:18	18:20	32:33	32:31	33:22	28:54	27:31	26:41
Video Focused App/Web on a Smartphone	1:53	3:00	2:01	1:20	0:49	2:33	2:12	2:56	2:42	1:45	1:39
Streaming Audio	0:57	1:39	0:59	0:36	0:19	1:21	1:12	1:03	1:14	1:01	0:54
Social Networking	6:19	9:25	6:49	4:45	3:19	8:14	7:21	7:07	7:22	6:33	6:05
App/Web on a Tablet	6:05	4:34	6:12	6:57	7:01	5:18	5:45	5:57	5:07	6:25	6:09
Video Focused App/Web on a Tablet	0:55	1:02	1:02	0:44	0:52	1:02	0:58	1:00	1:11	1:03	0:53
Streaming Audio	0:11	0:15	0:13	0:08	0:07	0:14	0:13	0:11	0:12	0:18	0:10
Social Networking	0:57	0:52	0:56	1:01	1:02	0:54	0:54	0:46	0:44	0:56	1:00

Note: Internet Connected Device is inclusive of Smart TV app usage.

Q3 2019 WEEKLY TIME SPENT IN HOURS: MINUTES AMONG USERS OF EACH MEDIUM

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+	WHITE 18+
Total Use of Television	35:35	22:21	30:07	41:27	50:33	26:07	29:30	47:31	26:50	23:19	35:07
Live+Time-Shifted TV	30:39	13:33	23:57	37:33	47:48	18:46	22:54	41:08	21:36	18:19	30:23
Time-Shifted TV	6:29	3:08	5:23	7:46	9:34	4:23	5:06	6:10	4:35	4:19	6:47
TV-Connected Devices	10:53	13:38	10:44	8:47	8:03	12:18	11:35	13:46	10:28	10:29	10:25
DVD/Blu-ray Device	4:00	4:32	4:07	3:53	3:32	4:18	4:13	5:11	3:56	4:38	3:46
Game Console	9:45	11:47	7:46	6:14	5:17	10:21	9:07	11:48	8:30	7:50	9:31
Internet Connected Device	9:20	10:11	9:20	8:33	8:32	9:47	9:45	11:53	9:04	9:28	8:53
Radio	12:58	10:14	13:02	15:34	13:30	11:32	12:38	13:35	12:33	na	12:57
Internet on a Computer	6:47	6:35	6:51	7:38	5:46	6:43	7:00	5:40	5:24	7:28	6:57
Social Networking	1:59	1:40	1:52	2:27	1:52	1:46	1:57	1:20	1:22	2:02	2:04
Video on a Computer	2:48	3:47	2:59	2:25	1:26	3:24	3:09	3:28	2:49	3:06	2:40
App/Web on a Smartphone	32:34	36:42	34:12	29:10	3:28	35:33	35:19	38:38	33:27	31:09	31:34
Video Focused App/Web on a Smartphone	2:37	3:35	2:28	1:58	1:40	3:05	2:41	3:43	3:27	2:20	2:21
Streaming Audio	1:29	2:07	1:22	1:03	0:47	1:48	1:39	1:33	1:53	1:29	1:27
Social Networking	7:45	10:34	7:34	5:51	5:22	9:12	8:12	8:31	8:56	7:43	7:31
App/Web on a Tablet	13:05	12:10	12:00	13:48	14:30	12:05	12:00	13:37	11:52	12:40	13:06
Video Focused App/Web on a Tablet	3:03	3:55	3:04	2:18	2:52	3:29	3:04	3:16	3:48	3:11	2:55
Streaming Audio	0:44	1:04	0:46	0:33	0:28	0:55	0:48	0:47	0:52	1:03	0:41
Social Networking	2:42	3:07	2:30	2:33	2:39	2:48	2:35	2:22	2:21	2:27	2:47

Q3 2019 WEEKLY REACH OF USERS (000) BY MEDIUM

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+	WHITE 18+
Total Use of Television	222,446	59,117	55,382	58,639	49,307	114,499	111,488	28,754	35,585	12,793	163,101
Live+Time-Shifted TV	210,445	51,931	52,105	57,488	48,921	104,036	103,456	27,621	33,279	11,092	155,013
Time-Shifted TV	122,066	26,842	33,604	35,248	26,372	60,446	63,776	16,044	15,430	5,470	92,494
TV-Connected Devices	134,616	45,314	39,122	31,007	19,173	84,436	79,513	16,702	22,495	9,070	97,934
DVD/Blu-ray Device	26,806	5,291	7,215	8,002	6,298	12,507	13,204	2,672	3,241	1,117	21,171
Game Console	34,891	19,360	10,737	3,706	1,087	30,098	24,217	4,773	6,341	1,699	25,102
Internet Connected Device	109,067	35,927	32,862	25,467	14,810	68,790	66,103	13,447	18,634	8,084	78,868
Radio	228,496	66,178	57,093	59,403	45,823	123,270	116,807	28,901	37,887	na	160,371
Internet on a Computer	136,949	37,770	35,796	37,870	25,513	73,566	72,162	14,921	17,085	10,372	103,241
Social Networking	74,596	19,552	19,347	21,907	13,791	38,898	39,151	6,859	7,857	5,895	57,780
Video on a Computer	78,066	22,360	20,712	22,067	12,927	43,072	42,334	7,540	8,826	6,364	59,637
App/Web on a Smartphone	212,866	66,519	56,278	54,878	35,190	122,797	115,034	27,200	34,398	14,520	154,583
Video Focused App/Web on a Smartphone	179,740	61,763	49,484	42,671	25,822	111,247	102,368	24,900	31,148	12,301	127,819
Streaming Audio	158,886	56,959	43,821	36,507	21,600	100,779	91,003	21,477	26,113	11,219	113,622
Social Networking	203,987	65,481	54,643	51,291	32,572	120,124	111,945	26,298	32,853	13,941	147,891
App/Web on a Tablet	116,282	27,538	31,384	31,870	25,490	58,922	59,794	13,728	17,136	8,327	85,863
Video Focused App/Web on a Tablet	75,815	19,482	20,464	20,007	15,862	39,946	39,314	9,642	12,357	5,411	54,827
Streaming Audio	61,921	16,856	16,564	15,765	12,736	33,421	32,621	7,421	9,404	4,574	45,392
Social Networking	88,490	20,564	22,457	25,038	20,431	43,021	43,728	10,206	12,361	6,240	65,918

Q3 2019 WEEKLY REACH % OF USERS AMONG U.S. POPULATION

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+	WHITE 18+
Total Use of Television	89%	80%	91%	93%	94%	85%	89%	91%	89%	78%	90%
Live+Time-Shifted TV	84%	70%	86%	91%	93%	77%	83%	87%	83%	67%	85%
Time-Shifted TV	49%	36%	55%	56%	50%	45%	51%	51%	38%	33%	51%
TV-Connected Devices	54%	61%	64%	49%	37%	63%	63%	53%	56%	55%	54%
DVD/Blu-ray Device	11%	7%	12%	13%	12%	9%	11%	8%	8%	7%	12%
Game Console	14%	26%	18%	6%	2%	22%	19%	15%	16%	10%	14%
Internet Connected Device	44%	49%	54%	40%	28%	51%	53%	42%	46%	49%	43%
Radio	92%	90%	94%	94%	88%	91%	93%	91%	96%	na	89%
Internet on a Computer	55%	51%	59%	60%	48%	55%	58%	47%	43%	63%	56%
Social Networking	30%	27%	32%	35%	26%	29%	31%	22%	20%	36%	32%
Video on a Computer	31%	30%	34%	35%	25%	32%	34%	24%	22%	39%	33%
App/Web on a Smartphone	85%	91%	93%	87%	67%	92%	92%	86%	86%	88%	85%
Video Focused App/Web on a Smartphone	72%	84%	82%	67%	49%	83%	82%	79%	78%	75%	70%
Streaming Audio	64%	78%	72%	58%	41%	75%	73%	68%	66%	68%	62%
Social Networking	82%	89%	90%	81%	62%	90%	90%	83%	83%	85%	81%
App/Web on a Tablet	46%	37%	52%	50%	48%	44%	48%	44%	43%	51%	47%
Video Focused App/Web on a Tablet	30%	27%	34%	32%	30%	30%	31%	31%	31%	33%	30%
Streaming Audio	25%	23%	27%	25%	24%	25%	26%	24%	24%	28%	25%
Social Networking	35%	28%	37%	40%	39%	32%	35%	32%	31%	38%	36%

Q3 2019 TOTAL PERSONS, KIDS, AND TEENS

WEEKLY SUMMARY OF USAGE

PERSONS 2+	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	30:54	32:17	279,214	88%
Live+Time-Shifted TV	23:57	26:53	260,741	83%
Time-Shifted TV	2:54	5:49	147,562	47%
TV-Connected Devices	6:57	11:11	178,889	57%
DVD/Blu-ray Device	0:30	4:06	34,767	11%
Game Console	1:50	9:39	54,438	17%
Internet Connected Device	4:37	9:18	143,241	45%
Radio (P12+)	11:17	12:29	249,812	91%

KIDS 2-11	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	22:01	20:33	36,244	89%
Live+Time-Shifted TV	12:22	12:24	32,128	79%
Time-Shifted TV	1:27	2:50	16,960	42%
TV-Connected Devices	9:39	12:00	28,832	71%
DVD/Blu-ray Device	0:46	4:47	5,685	14%
Game Console	2:35	8:06	11,492	28%
Internet Connected Device	6:17	9:48	22,984	56%

TEENS 12-17	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	16:26	17:17	20,525	82%
Live+Time-Shifted TV	7:52	9:01	18,169	73%
Time-Shifted TV	0:53	2:13	8,535	34%
TV-Connected Devices	8:34	12:19	15,442	62%
DVD/Blu-ray Device	0:23	3:36	2,276	9%
Game Console	4:06	11:23	8,055	32%
Internet Connected Device	4:05	8:02	11,190	45%
Radio	6:10	7:17	21,317	85%

TELEVISION DISTRIBUTION STATUS
% OF TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	JAN 2019	JAN 2020	JAN 2019	JAN 2020	JAN 2019	JAN 2020	JAN 2019	JAN 2020	JAN 2019	JAN 2020
Traditional Cable	75.3%	69.8%	73.4%	66.9%	67.6%	62.1%	63.9%	60.0%	76.8%	71.4%
vMVPD	4.4%	6.8%	4.1%	5.8%	4.1%	5.4%	8.3%	7.9%	4.2%	7.1%
Over-the-Air	13.0%	13.5%	16.7%	18.6%	21.2%	21.2%	13.6%	12.9%	11.8%	11.9%
Broadband-Only	7.3%	9.8%	5.8%	8.6%	7.2%	11.2%	14.3%	19.2%	7.2%	9.5%
Total Multichannel	**79.7%**	**76.6%**	**77.5%**	**72.7%**	**71.7%**	**67.5%**	**72.2%**	**67.9%**	**81.0%**	**78.5%**

Note: Traditional Cable, vMVPD, Over the Air, and Broadband Only breaks are mutually exclusive. Total Multichannel is the sum of Traditional Cable and vMVPD.

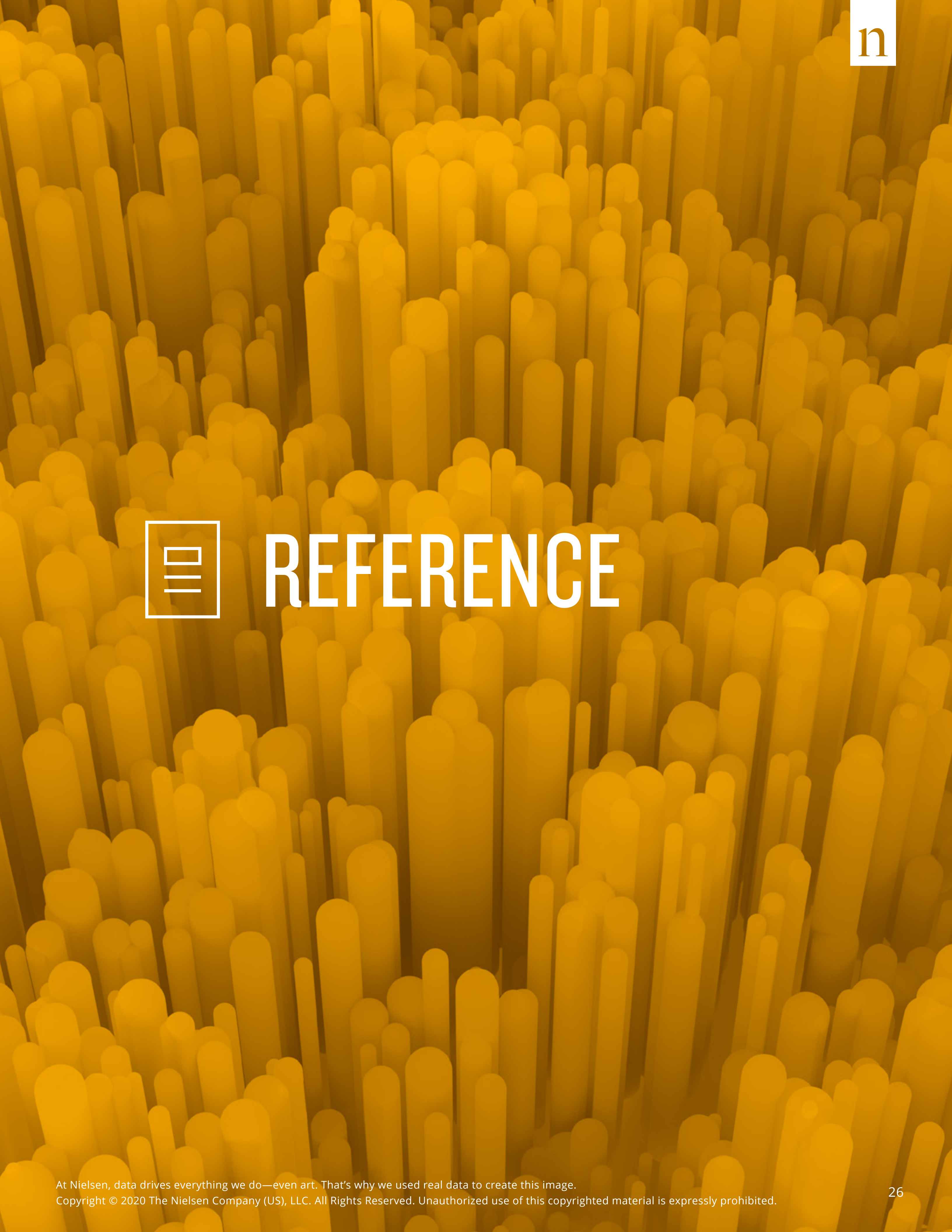
11% of homes that subscribe to a vMVPD also subscribe to a traditional cable services, 26% are over-the-air, and 63% are broadband only households.

DEVICE AND SERVICE OWNERSHIP % IN TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	JAN 2019	JAN 2020	JAN 2019	JAN 2020	JAN 2019	JAN 2020	JAN 2019	JAN 2020	JAN 2019	JAN 2020
DVD/Blu-ray Player	63%	58%	56%	48%	53%	46%	50%	44%	66%	61%
DVR	55%	53%	53%	50%	50%	47%	45%	42%	57%	54%
Enabled Smart TV	44%	51%	41%	49%	52%	59%	55%	62%	43%	50%
Internet Connected Device	39%	42%	40%	43%	41%	44%	57%	59%	38%	41%
Game Console	42%	40%	43%	41%	53%	52%	48%	47%	41%	39%
Computer	79%	78%	67%	68%	71%	72%	89%	89%	81%	81%
Smartphone	92%	94%	94%	95%	97%	98%	98%	98%	91%	93%
Tablet	64%	63%	56%	55%	63%	62%	75%	73%	65%	64%
Internet Enabled TV-Connected Devices	70%	73%	68%	72%	77%	80%	85%	88%	69%	73%
Subscription Video On Demand	68%	73%	62%	69%	72%	76%	81%	82%	68%	73%

TOTAL UNIVERSE ESTIMATES

	TOTAL	BLACK	HISPANIC	ASIAN	WHITE
A18+ Total Universe (millions)	250	32	39	16	182
% of A18+ Total Universe		13%	16%	7%	73%



REFERENCE

DIGITAL AUDIENCE MEASUREMENT

THE FOLLOWING TABLE PROVIDES ADDITIONAL DETAIL ON WHAT IS AND IS NOT INCLUDED IN DIGITAL MEASUREMENT WITHIN THIS REPORT.

	INCLUDES	DOES NOT INCLUDE
Internet on a Computer	Computer measurement of web surfing	Internet Applications (Non-browser applications such as office apps, email apps, banking information, private/ incognito browsing), video streaming in web players
Social Networking on a Computer	All sites in the Member Communities subcategory as defined in the Nielsen dictionary	YouTube and other sites with active public forums and comment sections
Video on a Computer	Computer video played in a web browser	Untagged content where audio is not present
App/Web on a Smartphone	• Android: all app/web activity, measured passively • iOS: all activity routed through an http and https proxy for both app and browser URLs	• iOS apps with no http/https activity (Ex. Calculator, Notes) • Email activity through the standard Mail app for iOS • Standard text messaging and iMessage is not included
Video Focused App/Web on a Smartphone	Apps and websites whose primary function is to provide video content (Ex. Netflix, YouTube, HBOGO)	Video content available on apps and websites where video is not the primary focus (Ex. CNN, Weather Channel). Video on social networks (Ex. Facebook, Snapchat) is not measured here but is included in Social Networking on a Smartphone
Streaming Audio on a Smartphone	Apps and websites specifically designed to provide audio content (Ex. Pandora, Spotify, iHeartRadio)	Audio content through apps that also provide video capabilities (Ex. YouTube, VEVO). That content is measured under Video Focused App/Web on a Smartphone.
Social Networking on a Smartphone	All apps/sites in the Social Networking subcategory as defined in the Nielsen dictionary	Apps and websites designated elsewhere in the Nielsen dictionary with active public forums and comments sections
App/Web on a Tablet	iOS: all activity routed through an http and https proxy for both app and browser URLs	• Android tablets • iOS apps with no http/https activity (Ex. Calculator, Notes) • Email activity through the standard Mail app for iOS • Standard text messaging and iMessage is not included
Video Focused App/Web on a Tablet	Apps and websites whose primary function is to provide video content (Ex. Netflix, YouTube, HBOGO)	Video content available on apps and websites where video is not the primary focus (Ex. CNN, Weather Channel). Video on social networks (Ex. Facebook, Snapchat) is not measured here but is included in Social Networking on a Tablet
Streaming Audio on a Tablet	Apps and sites specifically designed to provide audio content (Ex. Pandora, Spotify, iHeartRadio)	Audio content through apps that also provide video capabilities (Ex. YouTube, VEVO). That content is measured under Video Focused App/Web on a Tablet
Social Networking on a Tablet	All apps/sites in the Social Networking subcategory as defined in the Nielsen dictionary	Apps and websites designated elsewhere in the Nielsen dictionary with active public forums and comments sections

GLOSSARY

Broadband-Only: A household with at least one operable TV/monitor that receives video exclusively through a broadband internet connection instead of traditional means (over-the-air, wired cable, telco, satellite).

Enabled Smart TV: A household with at least one television set that is capable and enabled to access the internet.

Internet Connected Device: Devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. It is inclusive of Smart TV apps when used to represent device usage.

Internet Enabled TV-Connected Device: A category of devices capable and enabled to access the internet through the television. Devices would include internet enabled Smart TVs, video game consoles and internet connected devices.

Linear Platforms: Represent a combination of both traditional television and radio media platforms

Over-the-Air: A mode of television content delivery that does not involve satellite transmission or cable (i.e.—a paid service). Also commonly referred to as “broadcast.”

Radio: Listening to AM/FM radio stations, digital streams of AM/FM stations (where captured in diary markets or encoded in PPM markets), HD radio stations, and satellite radio as captured in diary markets only. No other forms of radio or audio are included at this time.

Satellite TV: A paid TV subscription where the signal is distributed to an orbiting satellite. The amplified signal is then re-transmitted to the home and received via a dish. (Sometimes also referred to as “dish.”)

Subscription Video on Demand (SVOD): A household with access to a subscription video on demand service. For the purpose of this report, this is limited to Netflix, Hulu, and Amazon Prime.

Telco: A paid TV subscription delivered fiber-optically via a traditional telephone provider.

Total Multichannel: Inclusive of Traditional Cable Plus (Wired Cable, Telco, Satellite) as well as homes that subscribe to a vMVPD service.

Total Use of Television: The sum of Live+Time shifted TV, DVD/Blu-ray device, Game Console, and Internet Connected Device usage. Combining all these sources provides the total usage on the television screen.

Traditional Cable: Group of TV subscription services that include wired cable, satellite or telco providers.

TV Household: A home with at least one operable TV/monitor with the ability to deliver video via traditional means of antennae, cable STB or Satellite receiver and/or with a broadband connection.

Virtual Providers (vMVPDs): Distributors that aggregate linear content licensed from major programming networks and package together in a standalone subscription format and accessible on devices with a broadband connection.

Wired Cable: Traditional cable delivered through wires to your home.

TELEVISION METHODOLOGY

Television data are derived from Nielsen's National TV Panel that is based on a sample of over 40,000 homes that are selected based on area probability sampling.

Live+Time-shifted TV (PUT) includes Live usage plus any playback viewing within the measurement period. Time-shifted TV is playback primarily on a DVR but includes playback of encoded content from video on demand, DVD recorders, server based DVRs and services like Start Over. Total Use of Television (TUT) includes Live TV + Time-shifted TV as well as TV-connected devices (DVD, Game Console, Internet Connected Device).

TV-connected devices include content being viewed on the TV screen through these devices. This includes when these devices are in use for any purpose, not just for accessing media content. For example, Game Console also includes when it is being used to play video games. Internet Connected Device usage includes Smart TV app usage.

Reach for television and TV-connected devices includes those viewing at least one minute within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences include both English and Spanish speaking representative populations.

RADIO METHODOLOGY

Audience estimates for 48 large markets are based on panel who carries a portable device called a Portable People Meter (PPM) that passively detects exposure to content containing inaudible codes embedded within. Audience estimates from the balance of markets in the U.S. are based on surveys of people who record their listening in a written diary for a week.

Estimates in this report are based on RADAR and the National Regional Database. RADAR reports national and network radio ratings using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents ages 12+ per year. The January 2020 report is based on the December RADAR studies.

Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included in the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements of at least 5 minutes of usage. Reach for Radio includes those listening for at least 5 minutes within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences include both English and Spanish speaking representative populations.

DIGITAL METHODOLOGY (COMPUTER, SMARTPHONE, TABLET)

Digital data is based on Nielsen's Total Media Fusion, which is reflective of both panel and census measurement. It leverages the most granular and comprehensive cross-platform respondent-level data from our panels, along with census data from Nielsen's Total Audience Measurement solutions, to provide the highest quality, representative sample of digital media consumption. Data for this was sourced from Nielsen Media Impact (Nielsen's cross platform planning solution).

Data used in this report is inclusive of multicultural audiences. For computer, Hispanic consumer audiences include both English and Spanish speaking representative populations. For mobile, recruitment of Spanish language audiences began in early 2017 and representation of Spanish Dominant Hispanic audiences continues to improve.

SOURCING

TIME SPENT AMONG U.S. POPULATION, TIME SPENT AMONG USERS, REACH OF USERS, REACH %

Total Use of Television, Live+Time-shifted TV, Live TV, Time-shifted TV, TV-Connected Devices (DVD, Game Console, Internet Connected Device) 07/01/2019 – 09/29/2019 via Nielsen NPOWER/National Panel; Radio 09/13/2018 – 09/11/2019 via RADAR 143; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. Weeks included for digital – 07/01/19, 07/08/19, 07/15/19, 07/22/19, 08/05/19, 08/12/19, 08/19/19, 09/02/19, 09/09/19, 09/16/19, 09/23/19. Digital data was produced on 01/06/20 and slight variations in data processed after this point reflect ongoing updates.

Note: Time spent among U.S. population includes whether or not they have the technology, and data sources can be added or subtracted as appropriate. Time spent among users of each medium would include different bases by source, and data sources should not be added or subtracted. Time spent among U.S. population includes visitor viewing and time spent among users excludes visitor viewing resulting in occurrences of reported time spent for U.S. population to be higher than users.

Some amount of simultaneous usage may occur across devices.

Several factors beyond organic growth contributed to an increase in smartphone and tablet usage starting in fourth-quarter 2018. Nielsen increased the sample size of our mobile panel, resulting in a larger proportion of newer panelists than in previous quarters. Technical enhancements were made to the mobile meter in both November 2018 and April 2019 that captured more overall usage from those points forward.

TELEVISION DISTRIBUTION STATUS, DEVICE OWNERSHIP

Based on scaled installed counts for January 1, 2020 via Nielsen NPOWER/National Panel.

GRACENOTE

Gracenote, a Nielsen company, is the leading global provider of video, music and sports data and content IDs which power next-generation entertainment experiences and inform critical business decisions. Gold-standard Gracenote data includes information on 200 OTT catalogs across North America, Europe, LATAM and APAC, TV listings for providers in more than 85 countries, descriptions for more than 100 million music tracks and statistics covering 4,500 sports leagues and competitions.

Unique program titles includes series, specials, sports, and films distributed across linear & streaming services in the U.S.

Subscription VOD excludes Amazon Prime Video, transactional VOD excludes Google Play and linear television exclusively is not on any OTT service.

STREAMING MEDIA CONSUMER SURVEY

The Nielsen Streaming Media Consumer Survey is a custom Nielsen study conducted in English only from November 14-23, 2019 via an online survey. It is based on a representative sample of 1000 U.S. adults 18+ who currently use streaming video and/or audio services.

STREAMING METER

Nielsen Custom Streaming Meter Usage Report, Based on a representative sample of approximately 1,000 OTT Capable households from National TV Panel, Sum of Daily Streaming Minutes, Weighted, P2+, 09/30/19 – 12/29/19.

THE AUDIO UNIVERSE

Radio is based on Nielsen RADAR and the National Regional Database. Streaming audio on a smartphone and tablet are based on Nielsen Total Media Fusion. Satellite radio is based on Nielsen Scarborough USA+ (Release 2 2018 for Q3 2018 and Release 1 2019 for Q3 2019). Smart speaker and voice assistant reach are based on the Nielsen MediaTech Trender.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.

The Nielsen Total Audience Report is solely for Client's internal use, and may not be disclosed to any third party.

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