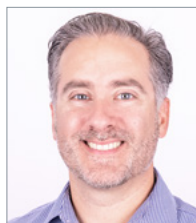




THE NIELSEN TOTAL AUDIENCE REPORT

Q1 2019



**PETER KATSINGRIS, SVP
AUDIENCE INSIGHTS**

How can an industry accurately and reliably determine the best strategies and make decisions about how it, in turn, help steer consumers to its' own brands or content without trusted cross-platform insights?

Well, without the best data, it simply can't.

It's why in this report, we leveraged our leading solutions to focus on the competitive arena of content discovery and how much time consumers are willing to spend trying to find suitable content, tune into the audio universe a little more, and, for the first time, share insights regarding cinema, a near \$50 billion dollar industry in the U.S. powered by younger consumers.

Let's talk choices. Think about the last time that you or loved ones decided to sit down and watch TV, listen to new tunes or stream a program. Were you stuck in decision purgatory, endlessly checking out previews unable to make an actual choice? How long were you there? And how much do you think the paradox of choice costs programmers, content owners, brands and marketers? Surely nobody wins when potential consumers get frustrated by the amount of choice, or simply unappealing options, and ultimately decide to just go to sleep instead.

Content discovery, be it through the streaming menu algorithms that serve up options based on your prior choices, network promos for new shows, playlist feeds from digital music apps, or even friends' recommendations is crucial to consumers in an era when they're inundated with ads and content. Conversely, these same consumers are connecting to this fragmented content at unparalleled rates—well over 11 hours each day across screens and devices. So it's never been more critical for content owners and marketers to cut through the clutter, and maybe even spur some disloyalty, to ensure that their offerings stand out from everything else.

HIGHLIGHTS

- U.S. Adults spend 11 hours and 27 minutes per day connected to media
- 66% of streaming service users know what they want to watch when tuning in
- 92% of U.S. adults listen to radio each week, highest of any platform
- Adults 35-49 spend more time per day on smartphones than any other age group
- Adults 18-34 spend over half of their daily media usage with digital media
- Asian American adults spend 42 minutes per day on Internet connected devices
- Black adults spend over an hour per day using TV-connected devices
- Half of all adults stream audio through their smartphones each week
- 28% of U.S. households own a smart speaker
- vMVPDS exist in 5.3% of all TV households as of June 2019
- 56% of moviegoers in the past 7 days are adults 18-34

As we continue to enhance our collection methods—and there is always a desire to make data better, faster and bolder for the industry—we've identified several factors beyond organic growth that contributed to an increase in smartphone and tablet usage starting in fourth-quarter 2018. We increased the sample size of our mobile panel, resulting in a larger proportion of newer panelists than in previous quarters. In addition, we made a technical enhancement to the mobile meter in November 2018 that captured more overall usage from that point forward.

More details on sources and methodologies for this report can be found in the appendix. As a reminder, the data in this report reflects the expanded use of additional data sources and is not comparable to the data cited in reports prior to first-quarter 2018.

We hope that our insights can help influence your own strategies to reach consumers. Enjoy!



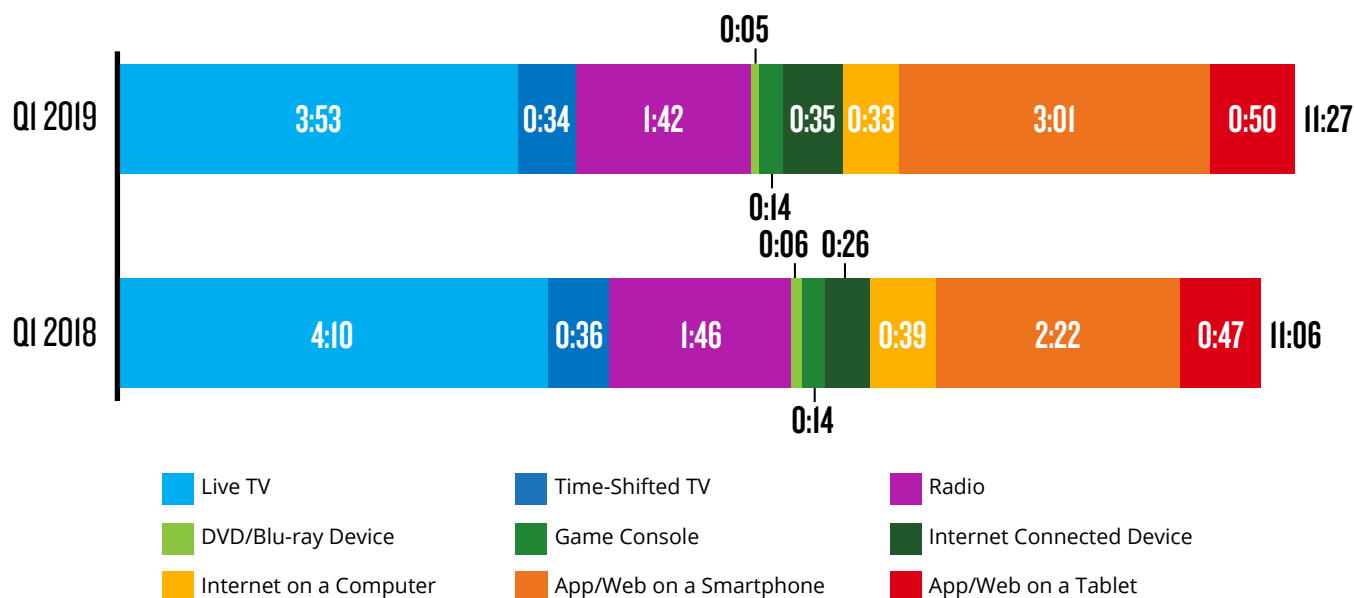
MEDIA CONNECTED CONSUMERS

Adults in the U.S. continue to increase their overall cross-media diet and, with it, opportunities abound for businesses that have efficient strategies to capitalize on them at their most engaged. These consumers spend 11 hours and 27 minutes per day interacting with media across TV, TV-connected devices, radio, computers, smartphones and tablets—21 minutes of additional media exposure across all platforms from first-quarter 2018. While that time comprises 48% of the total minutes available in a day, some simultaneous usage does occur across devices via multitasking consumers.

WOW FACTOR: U.S. ADULTS SPEND 11 HOURS AND 27 MINUTES PER DAY CONNECTED TO MEDIA!

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION



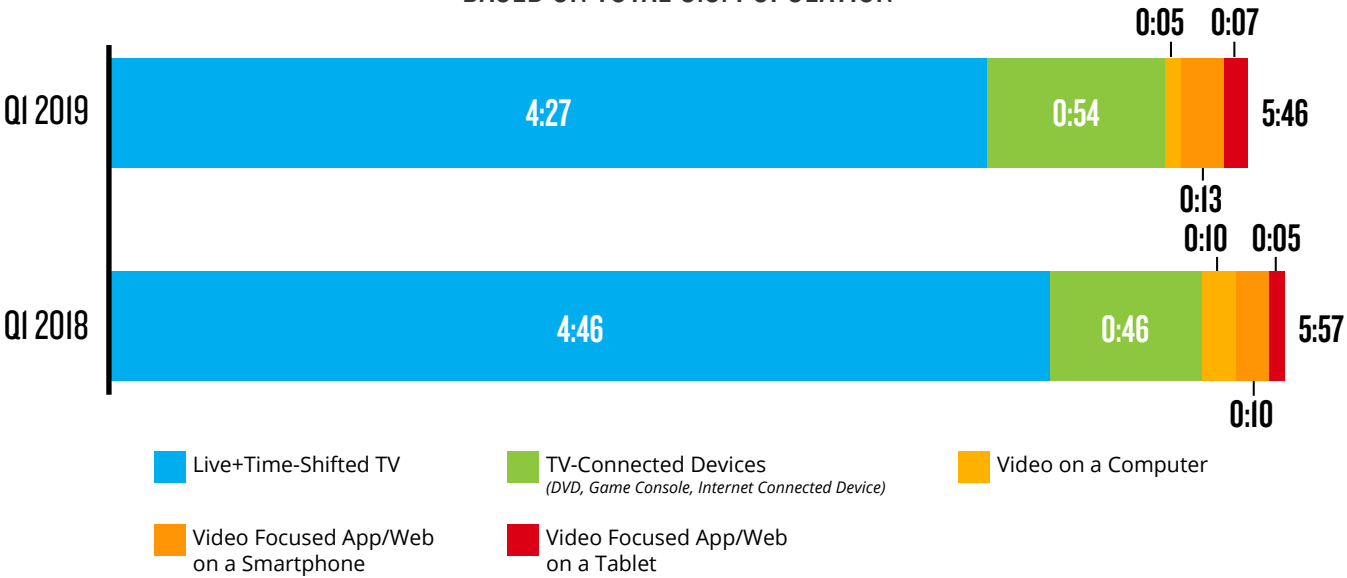
Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage. Measurement enhancements to the mobile panel contributed to increases in usage levels beyond pure organic growth.

Overall video use—time spent with a TV set, video on a computer, and using video focused app/web on smartphones and tablets—among adults is 5 hours and 46 minutes per day. This represents an 11 minute decline from first-quarter 2018. The dip from the prior-year can be attributed back to special TV happenings, such as the Winter Olympics, which didn't air this year. So anyone thinking the consumptive sky is falling shouldn't panic.

The connected TV has been the talk of 2019, and rightfully so. Compared with the year prior, video viewing through TV-connected devices has increased by 8 minutes daily, and as consumers replace old TV sets with TV screens preloaded with connected options, they're leaning into smart lifestyles. Alongside this connected TV growth, video on smartphones and tablets increased by an average total of 5 minutes per day. Both provide brands and media owners multiple touch points to deliver content with frequency in order to reach on-the-go consumers.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

BASED ON TOTAL U.S. POPULATION



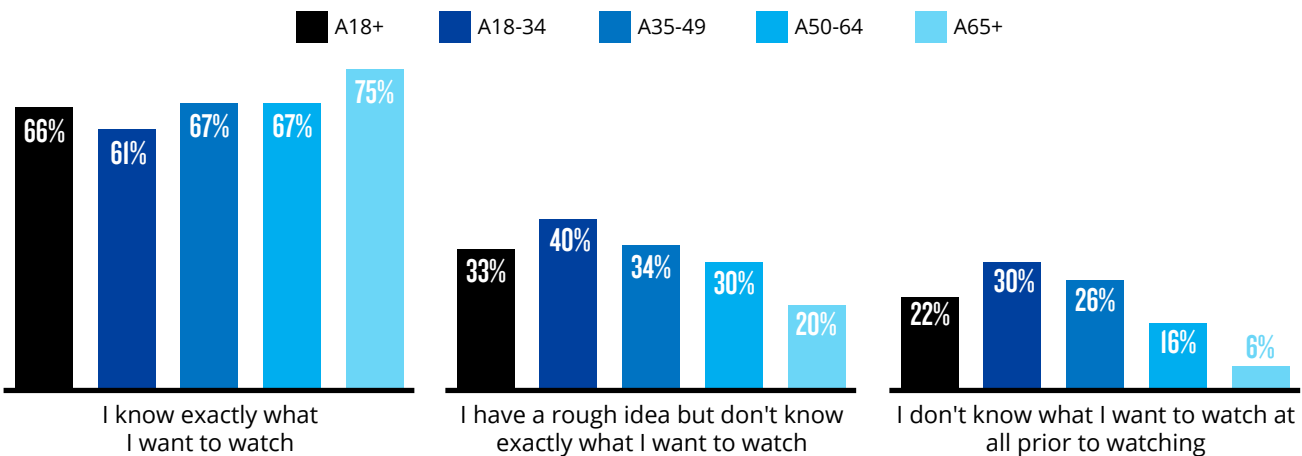
VIDEO CONTENT DISCOVERY

Options are great for consumers when it comes to deciding what to watch, but they're also decidedly complicated for an industry that continues to fragment and search for unique ways to influence their behavior and perhaps steer eyeballs toward their network, program, service or brand. Of course there are times when consumers turn on the TV with the intent to watch a particular piece of content, and then there are times when the power of persuasion works in spades.

According to the Nielsen MediaTech Trender, a quarterly consumer tracking survey focused on emerging technology, nearly two-thirds of adults who use a streaming service said they are most likely to know exactly what they want to watch always or most of the time. One-third have a rough idea, but aren't exactly sure, and 22% don't know what they want to watch before tuning in. These habits vary by age; adults 18-34 are most open to browsing for content, as 30% have no idea what to watch and 40% have a rough idea beforehand.

VIEWING PREFERENCES AMONG STREAMING SERVICE USERS

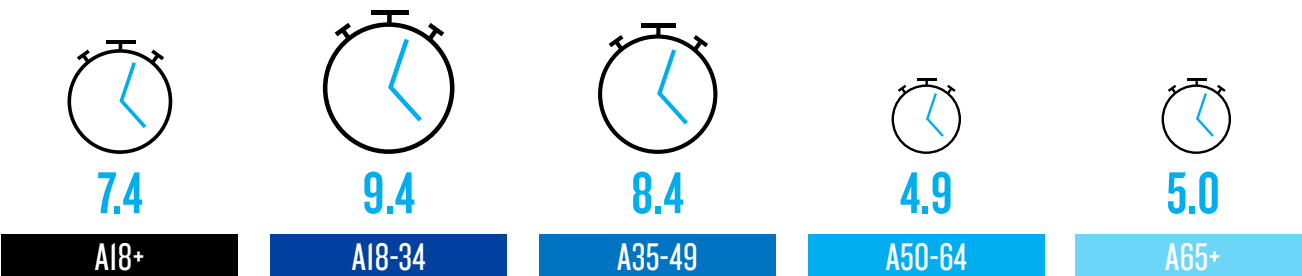
Thinking about all of the occasions you watch TV or videos, how often do the following happen?



Providers of content looking to influence the choices consumers make when they are deciding on content are on the clock. Call it a 10-minute warning. While many consumers probably have gone down the “rabbit hole” of choice, spending an inordinate amount of time trying to decide what to watch, the average U.S. adult takes a little over 7 minutes and adults 18-49 take between 8 and 10 minutes. Older adults abandon their pursuit after approximately 5 minutes and dive into something.

AVERAGE TIME MAKING A SELECTION AMONG STREAMING SERVICE USERS

When looking for something to watch, how many minutes would you estimate you spend browsing before making a selection?

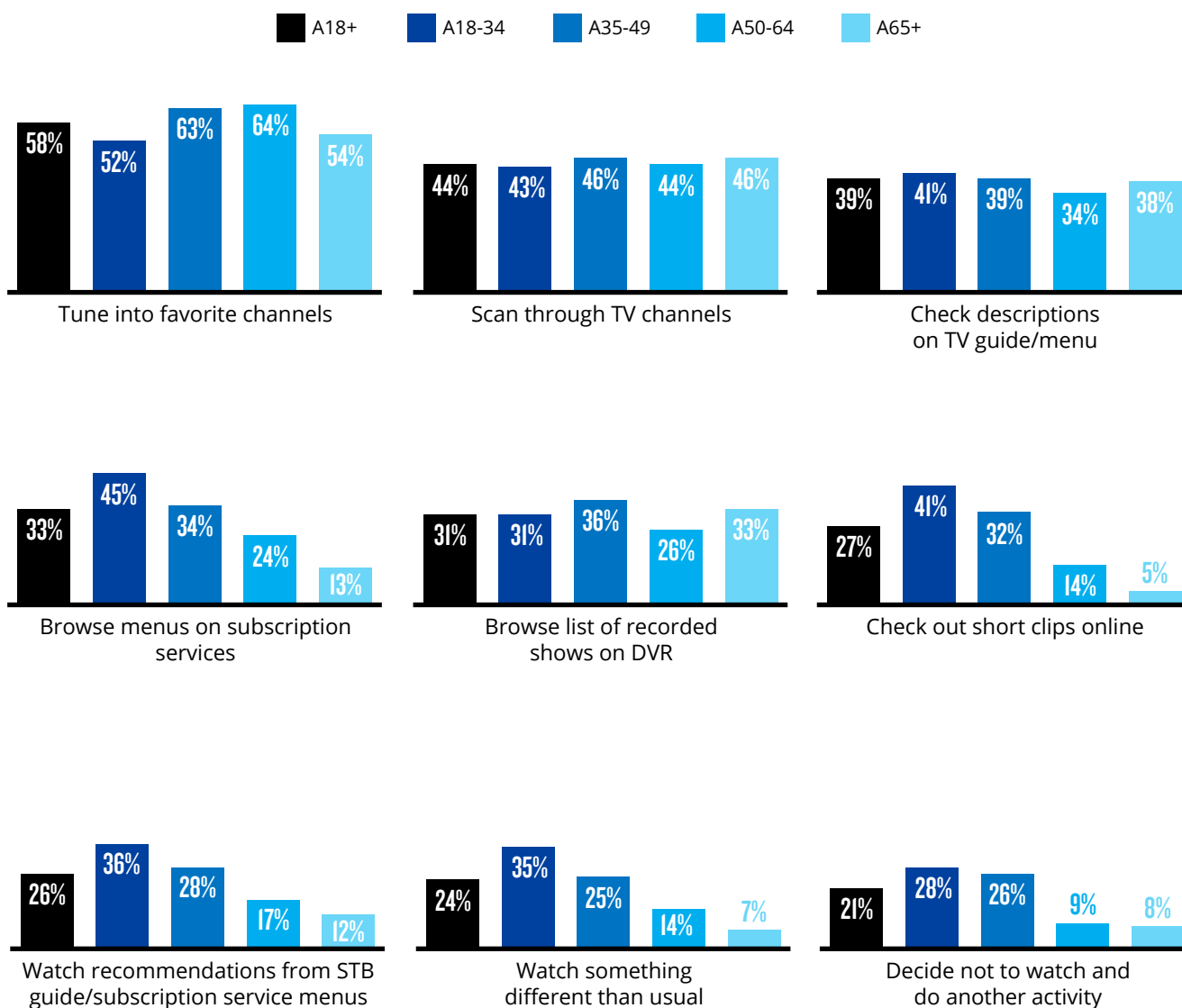


When looking for something to watch, how long would you estimate you spend browsing before making a selection? No need to answer, we know old habits die hard, and when faced with the dilemma of what to watch in an ever-increasing ocean of content, users are most likely to revert back to what they learned from linear TV—checking out certain favorite channels and surfing. Both are testaments to the simplistic utilitarianism of the TV remote as well as the power of familiarity. Both also suggest that programmers need to spur viewing disloyalty a little more.

Judging by respondents' sentiment, streaming platforms looking to dislodge these ingrained consumer habits with their algorithmic title suggestions based on previous subscriber choices still have a long way to go. Consider this: 21% of streaming service users said they decide to not watch any content and do something different when they want to watch, but they don't know exactly what. This suggests that streaming platforms could better refine the recommendations to better suit the tastes of users. What's more is that 26% of these users said they watched content based on the recommendations provided to them—only 5 percentage points higher.

SEARCH ACTIVITIES AMONG STREAMING SERVICE USERS

When you want to watch something but don't know exactly what, how frequently do you do the following?



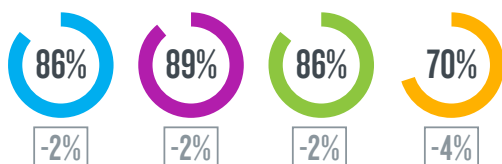
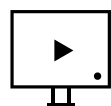
WEEKLY REACH ACROSS PLATFORMS

Sure, it's efficient to aim marketing dollars to the specific type of consumer actually buying your product (or dangling those segments in front of marketers if you are a media owner.) After all, consumers have very distinct tastes in both content and product consumption and an environment that lets the industry trade on that individuality, be it pet owners or new car shoppers, is certainly a growing trend.

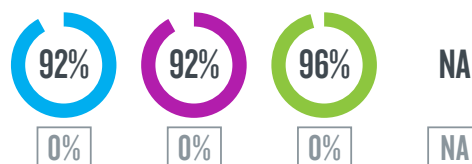
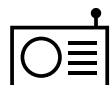
But if you are a big brand looking to tell your message to consumers at mass scale, the reach of media that come *gratis*, such as over-the-air TV or terrestrial radio, is still a good bet. While the weekly reach of TV has dipped slightly from 88% in first-quarter 2018 to 86% in first-quarter 2019, the number of over-the-air homes, think rabbit ears, has grown a bit. And radio tune-in remains steady, boasting the highest reach across all platforms at 92%. Among Hispanic adults, it's even higher: 96%. In terms of other ways homes connect, the reach of internet-connected devices increased the most year-over-year, rising to 42% from 35% in first-quarter 2018. App/web on a smartphone reach grew to 80% among all adults, while tablet reach declined from 47% to 45%.

Q1 2019 WEEKLY REACH % OF USERS 18+ AMONG U.S. POPULATION

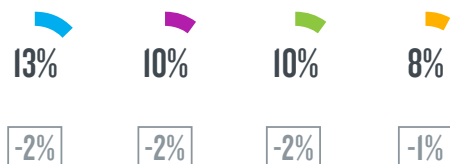
LIVE+TIME-SHIFTED TV



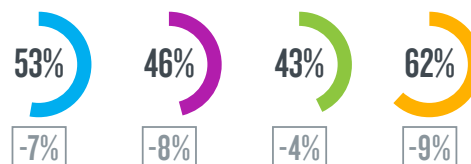
RADIO



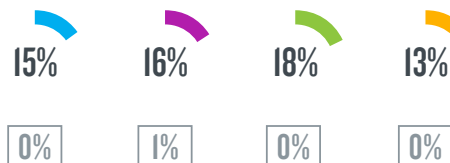
DVD/BLU-RAY DEVICE



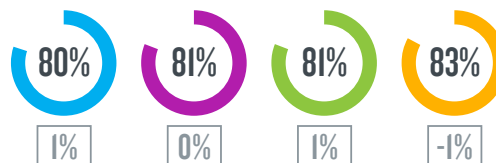
INTERNET ON A COMPUTER



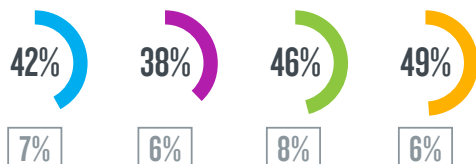
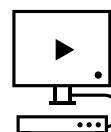
GAME CONSOLE



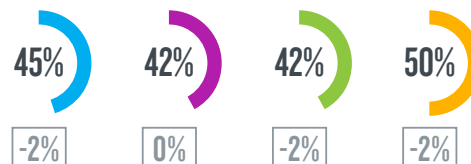
APP/WEB ON A SMARTPHONE



INTERNET CONNECTED DEVICE



APP/WEB ON A TABLET



■ Total
 ■ Black
 ■ Hispanic
 ■ Asian American
 YOY Change

Radio measurement includes Asian Americans but cannot be separated from the total audience at this time.

MEDIA TIME BY DEMOGRAPHIC

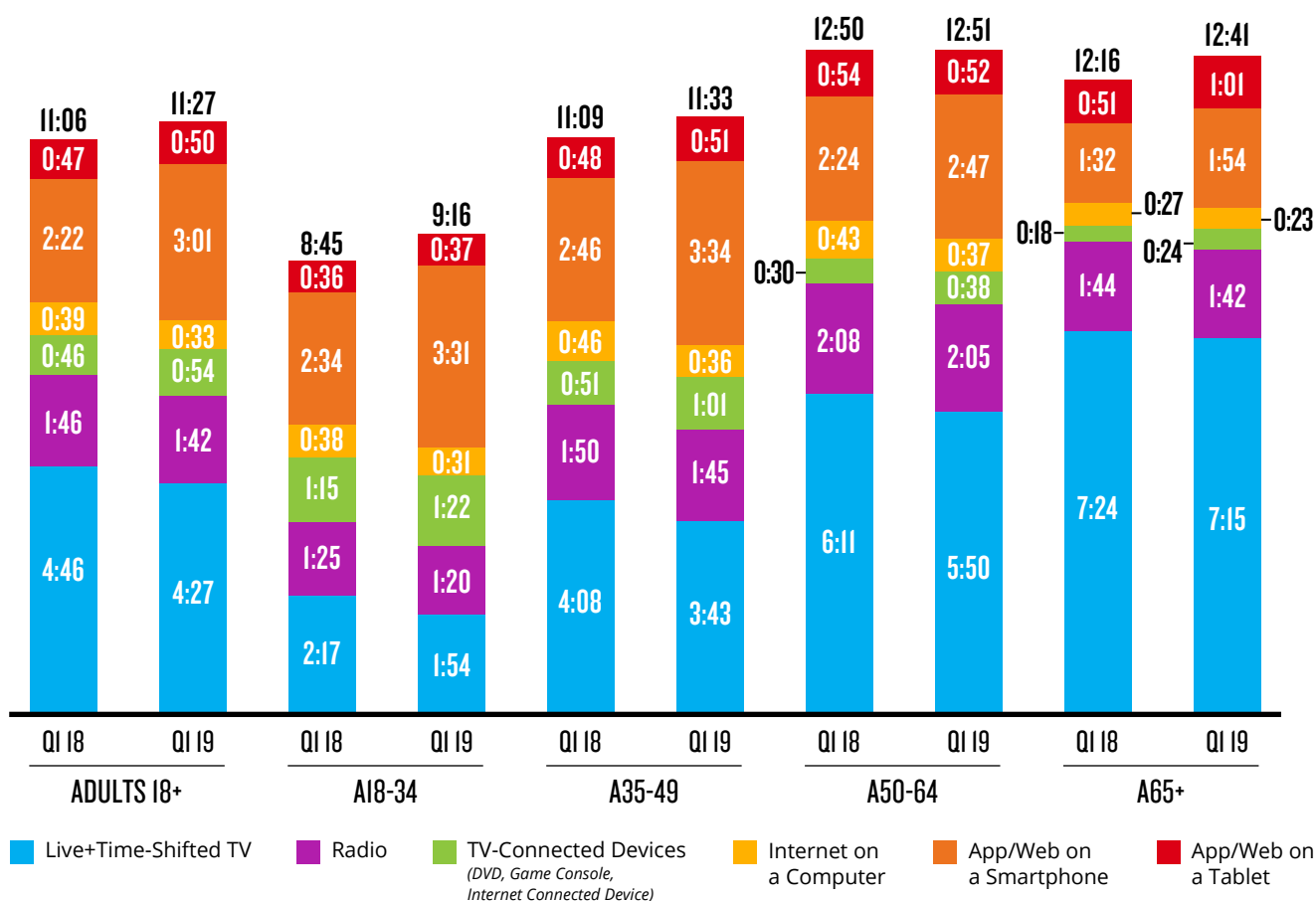
It's no wonder why marketers seem obsessed with reaching adults 18-34 years old. Simply put, Millennials can be hard to figure out, largely because the overall group includes adults moving through an important life stage, from late teens into adulthood. After all, the media habits and influences of an 18-year-old entering secondary education or hitting the workforce are quite different than those of a 30-something who's fully entrenched in a career, marriage and burgeoning family. The greatest growth in overall time spent with media came from these adults 18-34, who spent an additional 31 minutes per day across all media than the year prior. They also spend one hour and 22 minutes on TV-connected devices, more than any other age group. Marketers should allocate their spend accordingly and look to this connectivity to drive engagement.

Adults 50-64 still spend more time on media than any other group at 12 hours and 51 minutes per day, including the most time on radio, computers and tablets...perhaps a sign of an increasing sedentary lifestyle. It's important to keep an eye on older demos, however, as U.S. adults are spending more time in the workforce than prior generations and this could impact both their discretionary income as well as the time they have to spend on media as a consumer group.

THEY'RE "KEY" FOR A REASON: ADULTS 35-49 SPEND MORE TIME PER DAY ON SMARTPHONES THAN ANY OTHER AGE GROUP!

DAILY HOURS:MINS OF USAGE

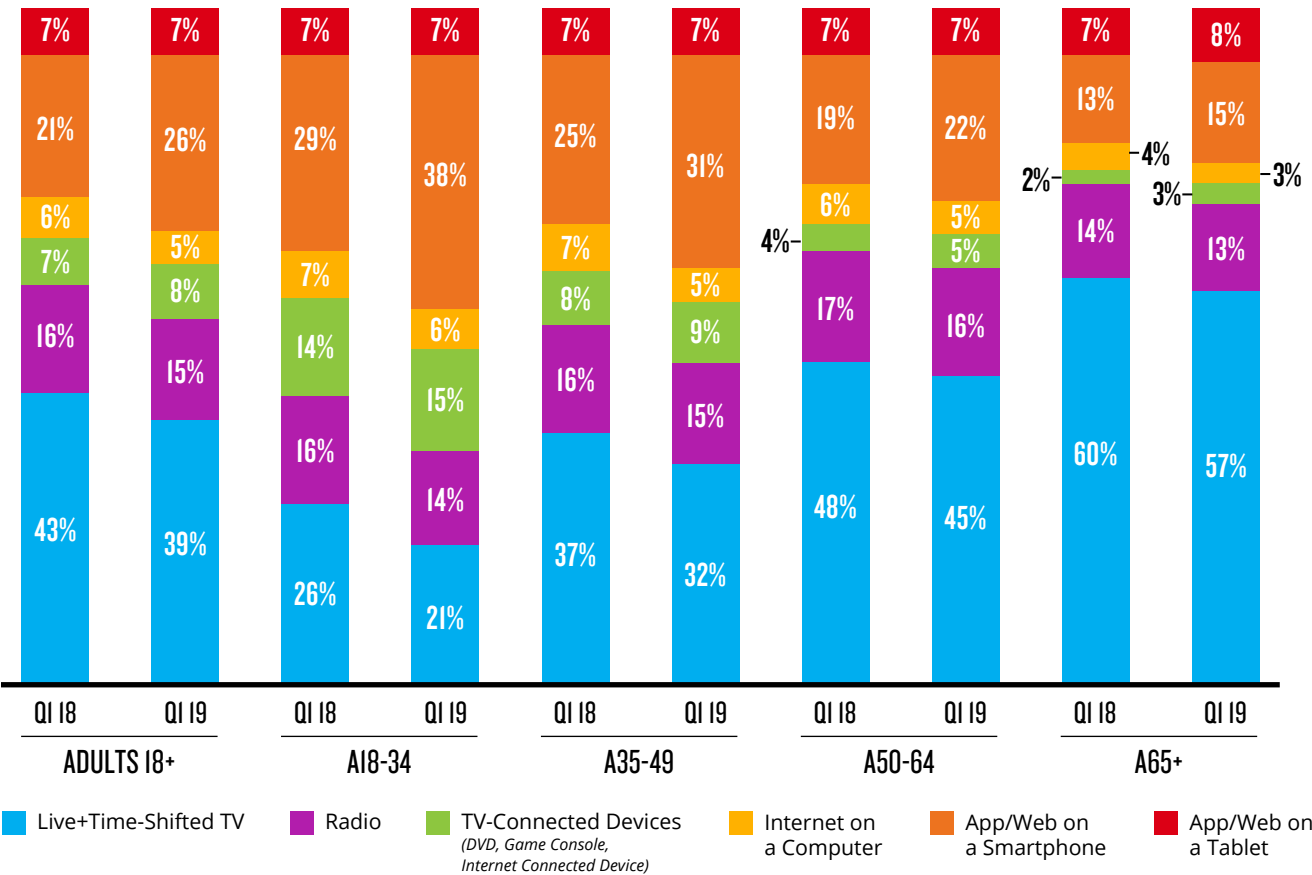
BASED ON TOTAL U.S. POPULATION



Taking a deeper look into the share of time spent on each platform reveals an increasing shift toward digital device usage—a shift that adults 18-34 are driving. Notably, this group spends half of its media time with computers, smartphones and tablets. Conversely, adults ages 50-64, who are the largest consumers of all media, spend 51% of their time watching TV and TV-connected devices and 34% on digital platforms. Radio consistently accounts for between 14% and 16% of daily media use across all age groups. With such difference across the generations, media owners and marketers seeking efficiency should allocate efforts accordingly.

SHARE OF DAILY TIME SPENT BY PLATFORM

BASED ON TOTAL U.S. POPULATION



READ THIS TWICE: ADULTS 18-34 SPEND OVER HALF OF THEIR DAILY MEDIA USAGE WITH DIGITAL MEDIA (COMPUTER, SMARTPHONE, TABLET)

THE MULTICULTURAL CONSUMER

These days, embracing diversity isn't an option for companies, it's a business imperative, and for marketers and content creators, the impetus should be no different. Sure, we each have our own unique media habits, but one of the many ways that racial and ethnic diversity across the U.S. can be highlighted is through media consumption—which is increasing. On a year-over-year basis, Black, Hispanic and Asian American adults increased their media consumption, and this is a trend marketers should consider as the racial pastiche of America continues to change.

While there are differences in media habits among different types of consumers, nearly all groups are leveraging internet-connected devices, including diverse audiences. Internet-connected device usage increased 10 minutes from the prior year's quarter by 10 minutes among every race/ethnicity, with Asian Americans spending 42 minutes per day on these devices—more than any other group.

Black adults continue to spend the most time overall with media at 13 hours and 38 minutes per day, which is 19% more time than the average adult. They also spend more time than any other group with TV, radio, TV-connected devices and smartphones.

ASIAN AMERICANS CONTINUE TO LEAD ALL GROUPS ON INTERNET-CONNECTED DEVICES

AVERAGE TIME SPENT PER ADULT 18+ PER DAY BASED ON TOTAL U.S. POPULATION

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	Q1 2018	Q1 2019	Q1 2018	Q1 2019	Q1 2018	Q1 2019	Q1 2018	Q1 2019
Live TV	4:10	3:53	6:01	5:37	3:07	2:49	2:08	1:56
Time-shifted TV	0:36	0:34	0:35	0:32	0:21	0:19	0:17	0:15
Radio	1:46	1:42	1:52	1:48	1:51	1:46	NA	NA
DVD/Blu-ray Device	0:06	0:05	0:07	0:05	0:05	0:04	0:04	0:03
Game Console	0:14	0:14	0:16	0:17	0:15	0:14	0:09	0:09
Internet Connected Device	0:26	0:35	0:29	0:39	0:28	0:38	0:32	0:42
Internet on a Computer	0:39	0:33	0:34	0:25	0:27	0:24	0:52	0:43
App/Web on a Smartphone	2:22	3:01	2:46	3:26	2:17	3:09	2:28	3:11
App/Web on a Tablet	0:47	0:50	0:47	0:49	0:39	0:45	0:50	0:51
Total	11:06	11:27	13:27	13:38	9:30	10:08	7:20*	7:50*

*Radio measurement includes Asian Americans but cannot be separated from the total audience at this time.

SEEKING CONNECTIONS: BLACK ADULTS SPEND OVER AN HOUR PER DAY USING TV-CONNECTED DEVICES

Black adults also spend 7 hours and 42 minutes per day watching videos, which is nearly 2 hours more than the average U.S. adult. But perhaps the real story is how Black adults are embracing the connected TV, a marketing boon for platforms seeking to capitalize on an audience that was simply not as prevalent five or 10 years ago. In fact, Black adults spend 9 more minutes per day on TV-connected devices than the average adult, and they're the only group to spend over an hour per day using that platform.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO BASED ON TOTAL U.S. POPULATION

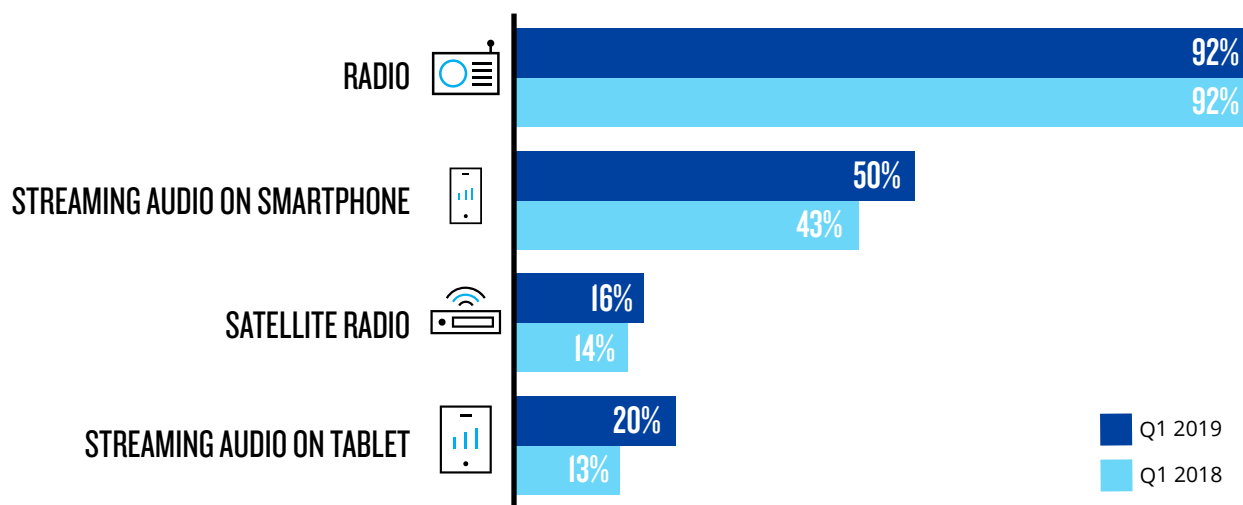
	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	Q1 2018	Q1 2019	Q1 2018	Q1 2019	Q1 2018	Q1 2019	Q1 2018	Q1 2019
Live+Time-shifted TV	4:46	4:27	6:37	6:09	3:28	3:08	2:25	2:11
TV-Connected Devices	0:46	0:54	0:52	1:01	0:47	0:56	0:44	0:54
Video on a Computer	0:10	0:05	0:13	0:05	0:10	0:05	0:14	0:07
Video Focused App/Web on a Smartphone	0:10	0:13	0:17	0:19	0:14	0:20	0:09	0:13
Video Focused App/Web on a Tablet	0:05	0:07	0:05	0:08	0:08	0:10	0:06	0:07
Total	5:57	5:46	8:04	7:42	4:47	4:39	3:38	3:32

THE AUDIO UNIVERSE

Audio, in all its various forms, is increasingly winning the attention of American consumers, with new devices and technologies changing the way we listen. Radio remains the centerpiece of the audio universe, reaching more U.S. adults each week at 92% than any other media platform. Half of all adults also use their smartphones to stream audio, a 16% increase over 2018, while 20% stream through their tablets and 16% listen to satellite radio.

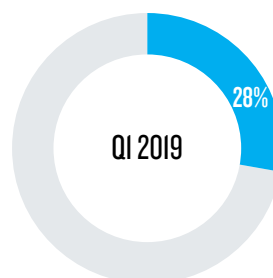
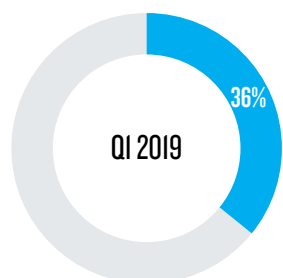
WEEKLY REACH OF AUDIO AMONG ADULTS 18+

BASED ON TOTAL U.S. POPULATION



ON THE GO: HALF OF ALL ADULTS STREAM AUDIO THROUGH THEIR SMARTPHONES EACH WEEK

Innovative new technologies are making access to audio seamless across a variety of platforms. Smart speakers can now be found in 28% of U.S. households, up from 22% in 2018. Voice assistants (which are built into smart speakers but are also found on smartphones and other digital devices) are also being used more than ever. Thirty-six percent of adults use a voice assistant such as Apple's Siri, Amazon's Alexa and Google Assistant.

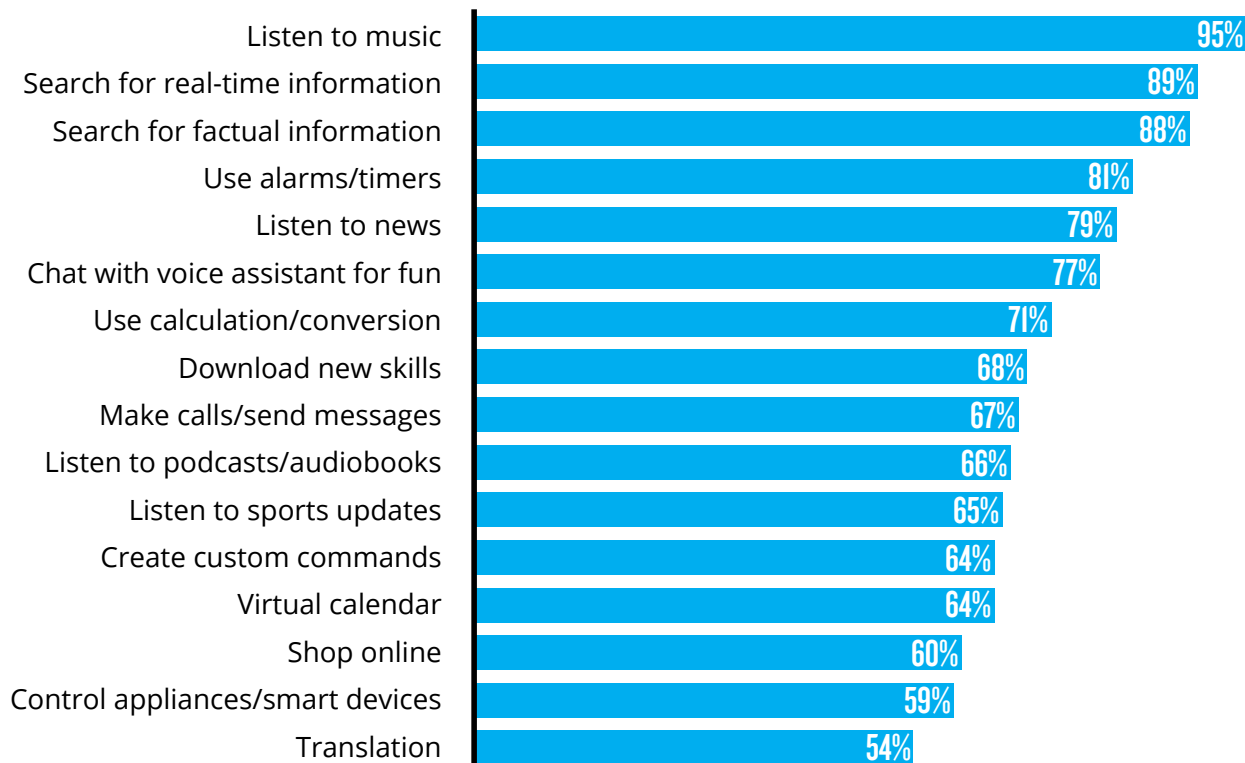


LISTEN UP: 28% OF U.S. HOUSEHOLDS OWN A SMART SPEAKER

Smart speakers are amplifying audio use through their versatility, portability and functionality. According to Nielsen's MediaTech Trender, nearly all smart speaker owners (95%) listen to music on their devices, a number that has grown from 90% last year. Seventy-nine percent listen to news (up from 68% in 2018) while 66% listen to podcasts or audiobooks (up from 45% last year) and 65% listen to sports updates (up from 52% in 2018). Consumers also use smart speakers in other functional ways with the most popular being searching for information, using alarms and timers and performing calculations and conversions. People also enjoy simply interacting with the voice assistants; 77% chat with them just for fun. Of course these devices also allow for purchasing, a perfect storm for marketers to pitch an often engaged consumer.

SMART SPEAKER WEEKLY ACTIVITIES

In what ways do you use your smart speaker each week?

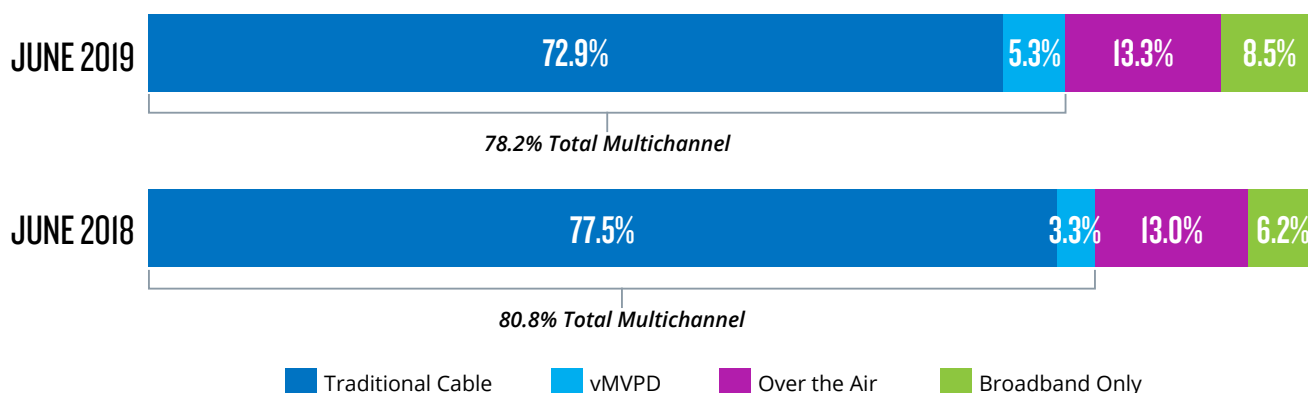


DEVICES AND SERVICES IN THE HOUSEHOLD

As of June 2019, total multichannel homes, which are the sum of traditional cable and virtual multichannel programming distributor (vMVPD) homes, account for over 78% of TV households. We're also tracking growth among broadband-only households, which are now in 8.5% of homes, up from 6.2% in June 2018. Subscriptions to vMVPDs services are also gaining momentum, as they are now found in 5.3% of all homes. It's also worth noting that the 13% of homes that subscribe to a vMVPD also subscribe to traditional cable services, 29% are over-the-air and 58% are broadband-only households. Knowing how this trend is playing out is one of the harbingers of health for traditional cable operators, as well as the cable networks themselves.

TELEVISION DISTRIBUTION STATUS

% OF TV HOUSEHOLDS



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

The lines between TV and digital continue to blur and, with it, come marketing and programming decisions that are often just as opaque. Internet-enabled TV-connected devices (enabled smart TVs, internet-connected devices and enabled game consoles) found in 72% of TV households, up 5 percentage points from the prior year. Penetration among Asian American households is even higher at 87%.

Additionally, there is a correlation between access to internet-enabled TV-connected devices and subscription-based video on demand (SVOD) services. These are now available in seven out of 10 TV households, up from 65% in June 2018. SVOD services are also in nearly three out of four Hispanic and eight out of 10 Asian American households.

HOUSEHOLD ACCESS %

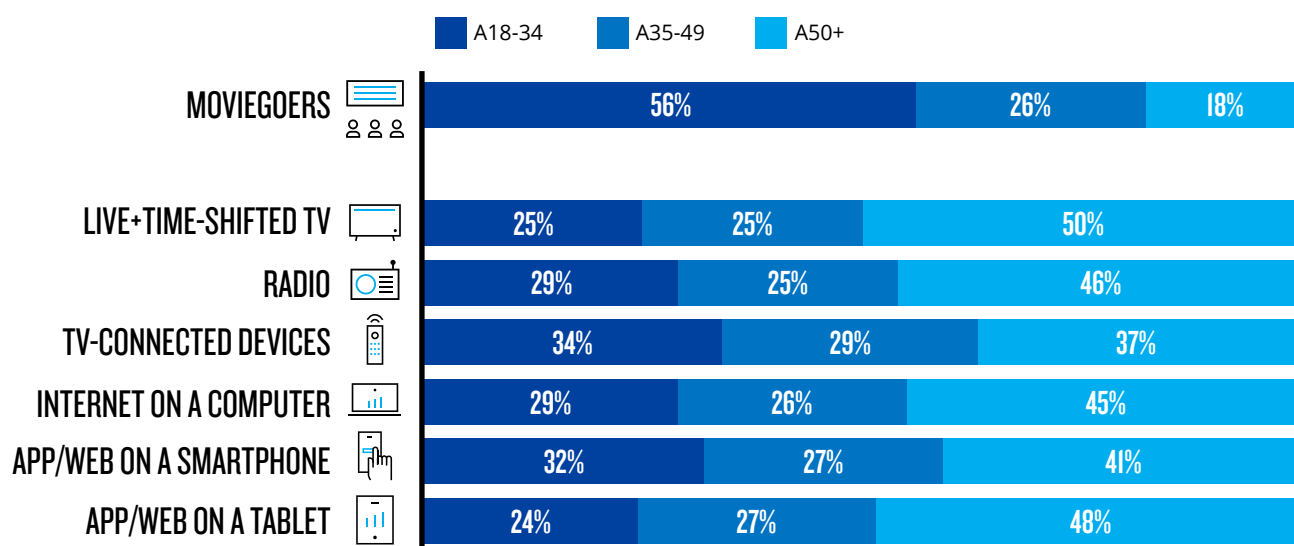
	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019
Internet Enabled TV-Connected Devices	67%	72%	65%	70%	75%	79%	84%	87%
Subscription Video On Demand	65%	70%	58%	65%	68%	74%	78%	80%

TODAY'S MOVIEGOER

While not typically measured alongside other media platforms, movie theaters are a critical component of a consumer's larger viewing experience. Moviegoers are exposed to a variety of ad campaigns prior to the screening of the main feature, making them an attractive, and quite captive, audience to marketers.

Bring on more superhero movies! Compared with other platforms, moviegoers skew younger. According to the Nielsen on Location survey, 56% of adults who attended a movie within the past seven days are between the ages of 18 and 34. By comparison, 34% of TV-connected device and 32% of smartphone users are 18-34.

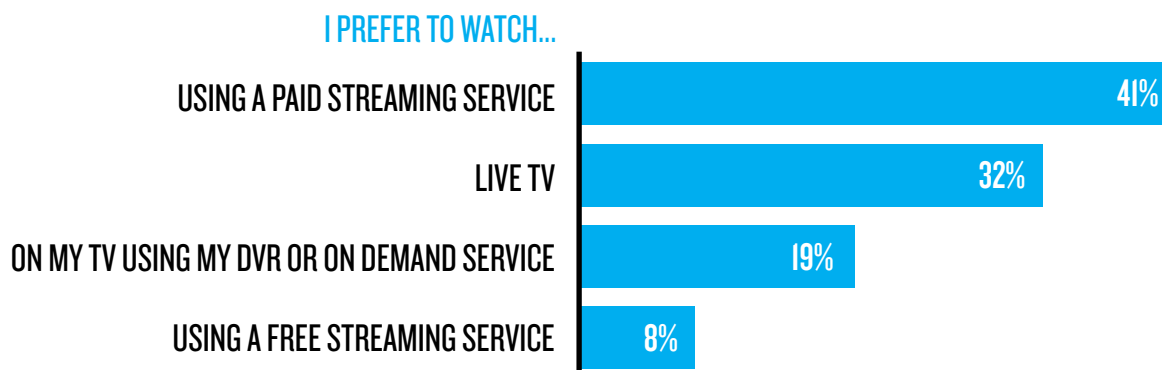
WEEKLY REACH COMPOSITION % BY PLATFORM



Moviegoers also have a unique set of TV viewing habits outside of the theater. According to the same survey, 41% prefer to watch a paid streaming service for their entertainment content. Fifty-one percent prefer watching traditional TV (32% live TV, 19% time-shifted), while 8% prefer watching a free streaming service.

VIDEO VIEWING PREFERENCES AMONG MOVIEGOERS 18+

Which best describes how you prefer to watch entertainment content or programs?





DATA TABLES

Q1 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+
Total Use of Television	37:30	22:58	33:15	45:20	53:39	27:36	32:04	50:06	28:31	21:42
Live+Time-Shifted TV	31:11	13:24	26:04	40:50	50:48	19:07	24:13	43:01	21:57	15:21
Time-Shifted TV	3:58	1:41	3:59	5:20	5:34	2:43	3:29	3:44	2:13	1:48
TV-Connected Devices	6:19	9:34	7:11	4:30	2:51	8:29	7:51	7:06	6:33	6:21
DVD/Blu-ray Device	0:34	0:30	0:37	0:39	0:32	0:33	0:36	0:35	0:26	0:23
Game Console	1:39	3:44	1:37	0:27	0:09	2:47	2:06	2:01	1:40	1:02
Internet Connected Device	4:05	5:20	4:57	3:24	2:10	5:10	5:09	4:30	4:27	4:56
Radio	11:57	9:20	12:20	14:35	11:59	10:41	11:53	12:34	12:23	na
Internet on a Computer	3:49	3:42	4:15	4:24	2:46	3:57	4:14	2:52	2:51	4:59
Social Networking	0:37	0:29	0:40	0:50	0:29	0:34	0:39	0:20	0:24	0:46
Video on a Computer	0:35	0:52	0:38	0:30	0:14	0:46	0:44	0:33	0:35	0:47
App/Web on a Smartphone	21:05	24:40	25:01	19:32	13:22	24:49	24:23	24:01	22:00	22:14
Video Focused App/Web	1:30	2:30	1:37	0:59	0:35	2:06	1:43	2:15	2:20	1:28
Streaming Audio	0:29	0:42	0:34	0:22	0:12	0:38	0:36	0:33	0:32	0:30
Social Networking	4:56	7:26	5:29	3:38	2:22	6:33	5:44	5:38	5:53	5:06
App/Web on a Tablet	5:47	4:22	6:02	6:07	7:07	5:07	5:32	5:46	5:15	5:56
Video Focused App/Web	0:48	1:03	0:55	0:35	0:36	0:59	0:53	0:59	1:11	0:49
Streaming Audio	0:07	0:06	0:09	0:06	0:05	0:08	0:08	0:09	0:06	0:08
Social Networking	0:50	0:44	0:50	0:49	0:58	0:47	0:50	0:49	0:42	0:49

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

Q1 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+
Total Use of Television	39:06	24:38	33:42	45:54	55:00	29:01	32:57	50:38	29:28	24:49
Live+Time-Shifted TV	33:59	15:41	27:24	41:58	52:27	21:30	26:07	44:41	23:59	19:17
Time-Shifted TV	7:15	3:42	6:21	8:43	10:29	5:08	5:56	6:41	5:02	4:33
TV-Connected Devices	10:42	13:38	10:30	8:37	7:27	12:11	11:28	12:34	10:31	10:42
DVD/Blu-ray Device	4:11	4:54	4:02	4:12	3:43	4:23	4:20	5:14	4:19	4:26
Game Console	9:47	11:45	7:54	6:19	5:46	10:22	9:17	11:14	8:36	8:11
Internet Connected Device	9:01	9:56	8:59	8:20	7:54	9:29	9:27	10:40	8:56	9:28
Radio	13:06	10:24	13:11	15:35	13:39	11:41	12:47	13:41	12:52	na
Internet on a Computer	7:12	7:07	7:25	7:50	6:05	7:16	7:29	6:16	6:36	8:00
Social Networking	2:07	1:45	2:07	2:36	1:55	1:56	2:05	1:28	1:53	2:07
Video on a Computer	2:28	3:29	2:23	1:58	1:24	2:58	2:45	2:40	2:55	2:35
App/Web on a Smartphone	26:31	28:32	28:43	24:13	22:22	28:37	28:08	29:46	27:11	26:42
Video Focused App/Web	2:19	3:12	2:09	1:41	1:28	2:44	2:17	3:10	3:21	2:08
Streaming Audio	0:57	1:08	1:01	0:47	0:38	1:05	1:02	1:03	1:01	0:56
Social Networking	6:33	8:52	6:33	4:52	4:21	7:49	6:53	7:20	7:42	6:28
App/Web on a Tablet	12:47	11:47	11:44	12:35	15:32	11:45	11:44	13:36	12:26	11:58
Video Focused App/Web	2:49	4:02	2:48	2:03	2:11	3:24	2:52	3:21	3:54	2:38
Streaming Audio	0:33	0:34	0:42	0:30	0:23	0:38	0:38	0:44	0:32	0:34
Social Networking	2:29	2:50	2:21	2:14	2:36	2:35	2:31	2:38	2:23	2:17

Q1 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+
Total Use of Television	224,279	60,185	56,220	59,236	48,637	116,406	113,414	28,873	35,609	12,875
Live+Time-Shifted TV	215,592	54,756	54,064	58,422	48,350	108,820	107,821	28,150	33,789	11,454
Time-Shifted TV	130,245	30,271	36,254	37,176	26,544	66,525	69,663	16,524	16,412	5,943
TV-Connected Devices	134,806	45,767	39,366	31,041	18,633	85,132	80,202	16,215	22,740	9,204
DVD/Blu-ray Device	31,419	6,265	8,731	9,274	7,149	14,996	15,991	3,180	3,747	1,323
Game Console	38,031	20,940	11,816	4,097	1,177	32,756	26,489	5,172	7,039	2,076
Internet Connected Device	104,267	34,900	31,687	24,307	13,373	66,587	63,979	12,100	18,179	7,996
Radio	229,131	66,626	57,233	59,444	45,828	123,859	117,146	29,169	37,923	na
Internet on a Computer	132,197	38,213	34,699	35,537	23,747	72,912	70,706	14,437	16,913	10,050
Social Networking	72,534	20,272	18,936	20,235	13,091	39,207	38,844	7,082	8,220	5,811
Video on a Computer	59,524	18,407	16,164	15,928	9,026	34,571	33,134	6,472	7,783	4,906
App/Web on a Smartphone	198,841	63,593	52,887	51,147	31,215	116,479	108,384	25,482	31,815	13,445
Video Focused App/Web	161,133	57,349	45,485	37,362	20,937	102,835	93,514	22,408	27,409	11,070
Streaming Audio	125,015	45,599	33,606	29,056	16,754	79,205	71,237	16,760	20,536	8,698
Social Networking	188,126	61,599	50,712	47,415	28,401	112,311	104,014	24,258	29,945	12,743
App/Web on a Tablet	113,161	27,212	31,085	30,846	24,018	58,297	58,858	13,369	16,501	7,983
Video Focused App/Web	71,316	19,052	19,746	17,924	14,594	38,798	38,096	9,280	11,762	5,003
Streaming Audio	50,666	13,875	13,629	12,769	10,393	27,504	27,326	6,248	7,370	3,635
Social Networking	83,075	19,014	21,606	23,086	19,370	40,619	41,436	9,803	11,482	5,712

Q1 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+
Total Use of Television	90%	81%	92%	94%	94%	86%	91%	91%	90%	79%
Live+Time-Shifted TV	86%	74%	89%	93%	93%	81%	86%	89%	86%	70%
Time-Shifted TV	52%	41%	60%	59%	51%	49%	56%	52%	42%	36%
TV-Connected Devices	54%	62%	65%	49%	36%	63%	64%	51%	58%	56%
DVD/Blu-ray Device	13%	8%	14%	15%	14%	11%	13%	10%	10%	8%
Game Console	15%	28%	19%	6%	2%	24%	21%	16%	18%	13%
Internet Connected Device	42%	47%	52%	38%	26%	49%	51%	38%	46%	49%
Radio	92%	90%	94%	94%	88%	92%	94%	92%	96%	na
Internet on a Computer	53%	52%	57%	56%	45%	54%	57%	46%	43%	62%
Social Networking	29%	28%	31%	32%	25%	29%	31%	22%	21%	36%
Video on a Computer	24%	25%	27%	25%	17%	26%	27%	21%	20%	30%
App/Web on a Smartphone	80%	87%	87%	81%	60%	87%	87%	81%	81%	83%
Video Focused App/Web	65%	78%	75%	59%	40%	77%	75%	71%	70%	69%
Streaming Audio	50%	62%	55%	46%	32%	59%	57%	53%	52%	54%
Social Networking	75%	84%	84%	75%	54%	84%	83%	77%	76%	79%
App/Web on a Tablet	45%	37%	51%	49%	46%	43%	47%	42%	42%	50%
Video Focused App/Web	29%	26%	33%	28%	28%	29%	31%	29%	30%	31%
Streaming Audio	20%	19%	22%	20%	20%	21%	22%	20%	19%	23%
Social Networking	33%	26%	36%	36%	37%	30%	33%	31%	29%	35%

Q1 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	33:58	35:06	282,859	90%
Live+Time-Shifted TV	27:08	29:37	268,925	85%
Time-Shifted TV	3:26	6:27	158,434	50%
TV-Connected Devices	6:50	10:55	179,595	57%
DVD/Blu-ray Device	0:36	4:11	40,582	13%
Game Console	2:00	9:40	59,371	19%
Internet Connected Device	4:14	8:53	137,024	43%
Radio (P12+)	11:26	12:36	250,575	91%

KIDS 2-11	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	22:57	21:11	37,245	91%
Live+Time-Shifted TV	13:39	13:14	33,996	83%
Time-Shifted TV	1:35	2:55	18,477	45%
TV-Connected Devices	9:18	11:39	29,098	71%
DVD/Blu-ray Device	0:50	4:28	6,572	16%
Game Console	2:55	8:28	12,754	31%
Internet Connected Device	5:33	9:10	21,979	54%

TEENS 12-17	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	16:43	17:12	21,336	85%
Live+Time-Shifted TV	8:46	9:41	19,337	77%
Time-Shifted TV	1:04	2:24	9,711	39%
TV-Connected Devices	7:57	11:26	15,691	63%
DVD/Blu-ray Device	0:26	3:35	2,591	10%
Game Console	4:05	10:54	8,585	34%
Internet Connected Device	3:26	7:06	10,777	43%
Radio	6:19	7:25	21,444	86%

TV DISTRIBUTION STATUS, DEVICE OWNERSHIP IN TV HOUSEHOLDS

TELEVISION DISTRIBUTION STATUS % OF TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019
Traditional Cable	77.5%	72.9%	75.3%	71.0%	69.9%	64.8%	67.2%	61.2%
vMVPD	3.3%	5.3%	3.2%	4.9%	3.2%	4.9%	6.0%	8.5%
Over-the-Air	13.0%	13.3%	17.2%	17.5%	20.6%	22.0%	14.6%	14.5%
Broadband-Only	6.2%	8.5%	4.4%	6.7%	6.4%	8.4%	12.3%	15.8%
Total Multichannel	80.8%	78.2%	78.5%	75.9%	73.1%	69.7%	73.2%	69.7%

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

DEVICE OWNERSHIP % IN TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019	JUNE 2018	JUNE 2019
DVD/Blu-ray Player	66%	61%	60%	52%	57%	51%	53%	48%
DVR	55%	54%	53%	52%	50%	49%	47%	43%
Enabled Smart TV	39%	47%	36%	45%	47%	56%	51%	60%
Internet Connected Device	38%	41%	39%	42%	40%	42%	55%	59%
Game Console	42%	42%	42%	43%	53%	52%	47%	49%
Computer	79%	79%	68%	68%	69%	72%	89%	90%
Smartphone	91%	92%	93%	94%	96%	97%	97%	97%
Tablet	64%	64%	58%	58%	63%	63%	75%	74%

TOTAL UNIVERSE ESTIMATES

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



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	<ul style="list-style-type: none"> Android: all app/web activity, measured passively iOS: all activity routed through an http and https proxy for both app and browser URLs 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 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 Q1 2019 report is based on the June 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) 12/31/2018 – 03/31/2019 via Nielsen NPOWER/National Panel; Radio 03/29/2018 – 03/27/2019 via RADAR 141; 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 – 01/07/19, 01/14/19, 01/21/19, 02/04/19, 02/11/19, 02/18/19, 03/04/19, 03/11/19, 03/18/19, 03/25/19. Digital data was produced on 06/04/19 and slight variations in data processed after this point reflect ongoing updates.

A technical update was made to the mobile meter in November 2018 affecting smartphone and tablet measurement that resulted in an increased capture of overall usage from that point forward.

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.

Sum of individual sources may vary slightly from total due to rounding.

TELEVISION DISTRIBUTION STATUS, DEVICE OWNERSHIP

Based on scaled installed counts for June 1, 2019 via Nielsen NPOWER/National Panel.

MEDIATECH TRENDER SURVEY

Nielsen's MediaTech Trender is a quarterly consumer tracking study launched in Q1 2018 by Nielsen Media Analytics. The online survey is offered in both English and Spanish to a U.S. general population sample 13 years or older. Based on Q1 2019 data.

THE AUDIO UNIVERSE

Radio is based on the Nielsen RADAR and the National Regional Database. Streaming audio on a smartphone and tablet are based on Nielsen's Total Media Fusion. Satellite Radio is based on Nielsen Scarborough USA+ (Release 2 2017 current 6 months for Q1 2018 and Release 2 2018 current 6 months for Q1 2019).

NIELSEN ON LOCATION MOVIEGOER INSIGHTS

Nielsen on Location provides a unique measure of theater attendance in the U.S. Each week of the year, an online survey is conducted among a national sample who have seen a movie in a theater in the past seven days. Findings are based on an average of 52-weeks worth of data collected between December 30, 2017 and December 29, 2018.

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.



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