THE NIELSEN TOTAL AUDIENCE REPORT

Q3 2018

PETER KATSINGRIS, SVP
AUDIENCE INSIGHTS

Considering what connecting with media was like five, 10 or 20 years ago, consumers today are pretty lucky. They can customize their media behaviors and fit them perfectly with their needs— be it their life schedule, their interests or their location. While some consumers embrace this personalization, others are keen to be complacent and lean into what they are accustomed to. Both groups have options, however. That much is undeniable.

I've embraced this ability to curate my own media and often wake up talking to my smart speaker about the weather. I follow by tuning the radio in the car during the first leg on my hike into the Nielsen office. And then on my train-ride commute, I get digitally whimsical by either listening to music via a smartphone app, watching programs I downloaded before leaving home or flipping through the digital pages of an e-book.

This may sound similar to your content journey, but it's probably not exactly the same, given the innumerable choices literally at our fingertips. Marketers looking to capitalize on such rich engagement opportunities need to reach consumers with a like-minded approach to personalization, utilizing marketing strategies that account for this new cross-media world.

The one thing many adults in the U.S. have in common is that we spend a good part of our waking days with media. Overall total media use among U.S. adults remains unchanged year-over-year at 10-and-a-half hours per day. But there are shifts in where that time being spent is dedicated to, as we see increases in Internet connected devices and app/web smartphone usage that are gradually replacing time spent on other sources. These shifts are not surprising, as nearly seven out of 10 homes now have a device capable of streaming content, and a similar amount have access to a streaming SVOD service.

In this Q3 2018 edition of the *Nielsen Total Audience Report*, we are happy to share year-over-year comparisons of media use to show how consumer behaviors have shifted across comparable measurement intervals. In addition to the standard penetration estimates of devices and household types, a look at how digital consumption has evolved in the past year is included as well as insights into the influencing factors that shape the consumers journey as they access streaming audio and video content.

HIGHLIGHTS FROM THIS Q3 2018 SUMMARY INCLUDE:

- U.S. Adults spend 10 hours and 30 minutes per day connected to media, the same amount as one year ago
- Recommendations are a main influence on video and audio streaming
- Adults 50-64 spend more time per day on media than any other age group
- Adults 18-34 spend over one-third of their daily media usage on smartphones
- Black adults spend nearly 13 hours per day across all media
- Internet Connected Device/Smart TV app usage experienced the largest year-over-year growth in Q3 2018
- 92% of U.S. adults listen to radio each week
- vMVPDS exist in 3.7% of all TV households as of September 2018
- Enabled smart TV ownership had the largest year-over-year growth for all races and ethnicities

More details on sources and methodologies used within the 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 reports prior to Q1 2018.

Please take time to read and see how your personal behaviors match up to how others use media. Enjoy!

Thanks,

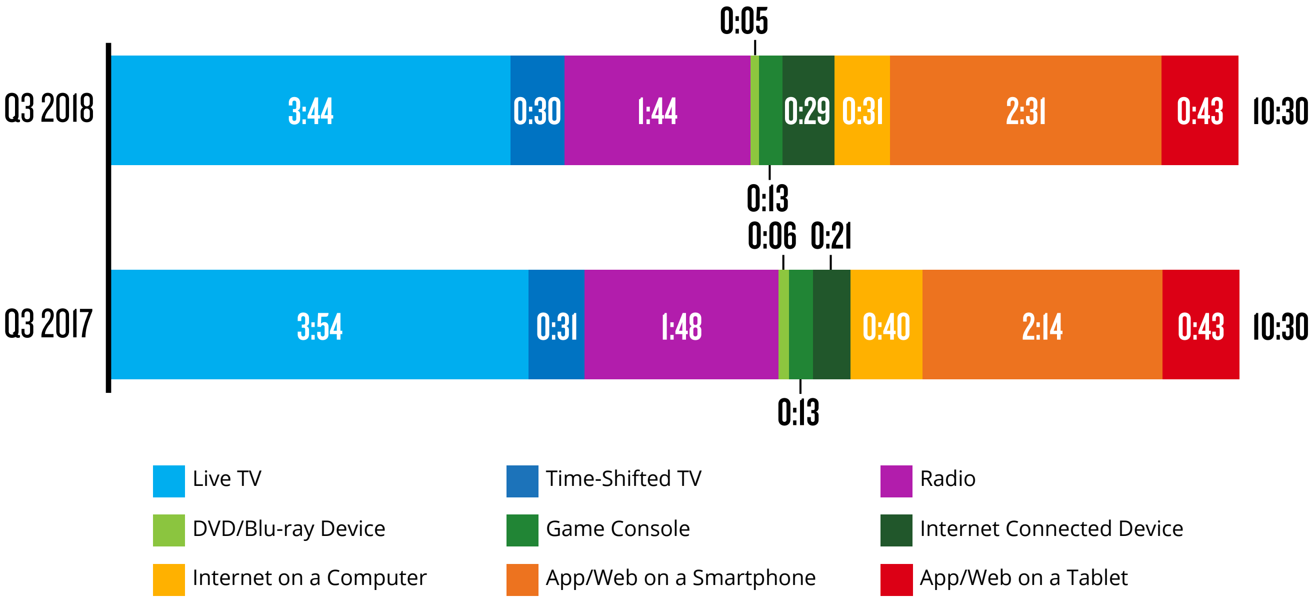
MEDIA CONNECTED CONSUMERS

U.S. adults are spending 10 hours and 30 minutes per day interacting with media across TV, Tv-connected devices, radio, computers, smartphones, and tablets. This total is equal to that of Q3 2017, although some shifts did occur across individual platforms. While that time comprises 44% of the total minutes available in a day, it is also important to acknowledge that some simultaneous usage does occur across devices.

U.S. ADULTS SPEND 10 HOURS AND 30 MINUTES PER DAY CONNECTED TO MEDIA, THE SAME AMOUNT AS ONE YEAR AGO

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION

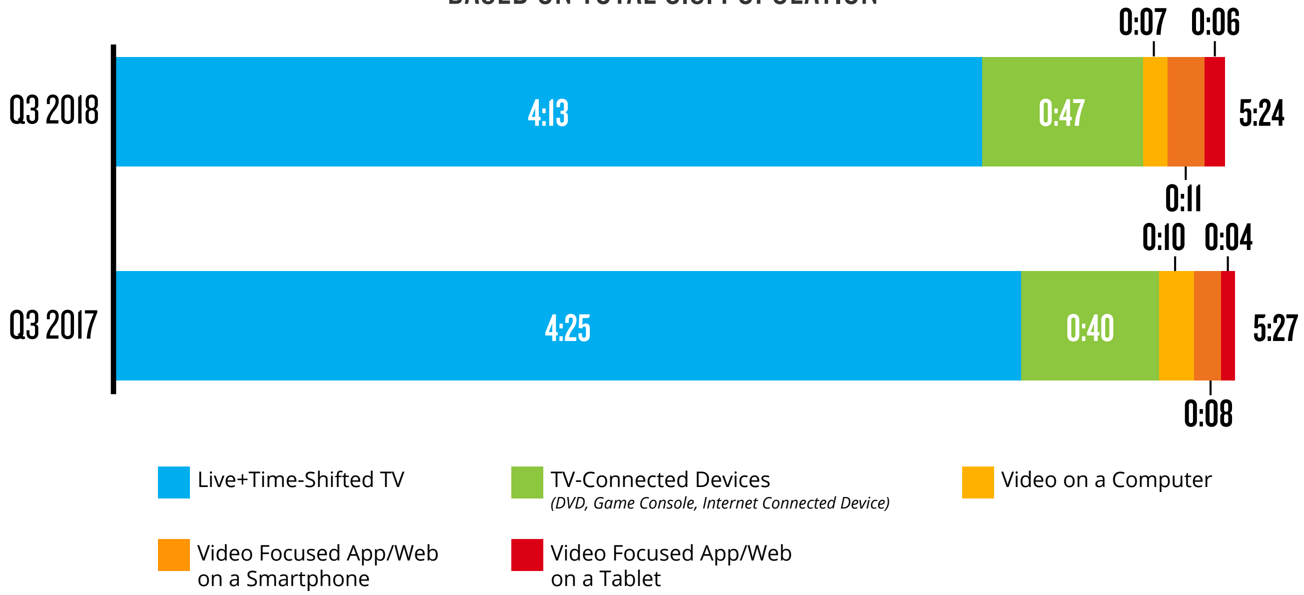


Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage.

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 24 minutes per day. This is equal to Q2 2018 and down slightly from 5 hours and 27 minutes in Q3 2017. Compared to the year prior, video through the television glass (live+time-shifted TV, TV-connected devices) decreased by five minutes while digital video (computer, smartphone, tablet) increased by two minutes. Additionally, video on a smartphone and tablet only includes entities whose primary purpose is streaming video; there is a portion of video content (including viewing on social networking sites) not included here.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

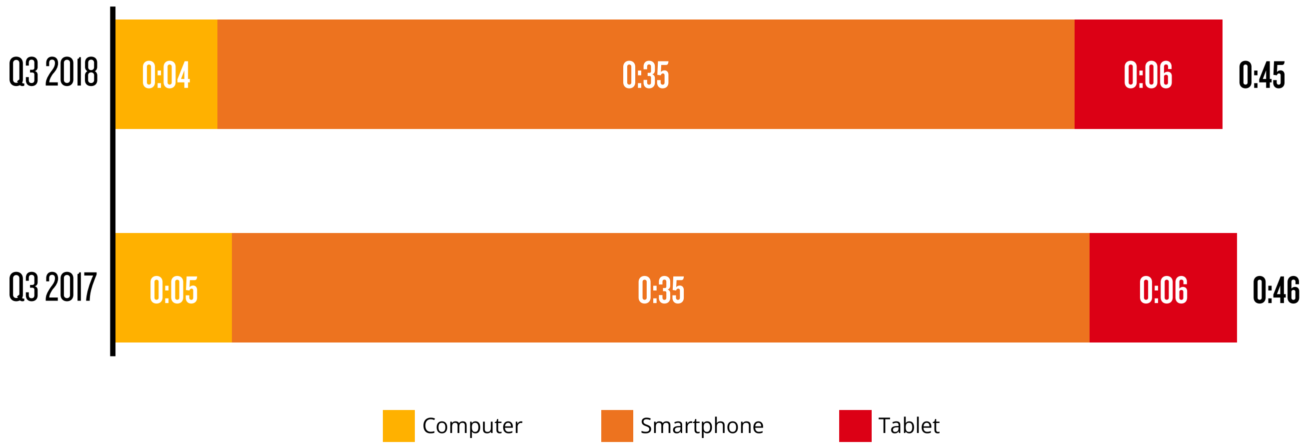
BASED ON TOTAL U.S. POPULATION



Time spent on social networking remained consistent across all digital platforms in the past year. Adults spent 45 minutes per day engaging with social media in Q3 2018, whether that be reading, commenting, or viewing video content.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON SOCIAL NETWORKING

BASED ON TOTAL U.S. POPULATION



SELECTING STREAMING CONTENT

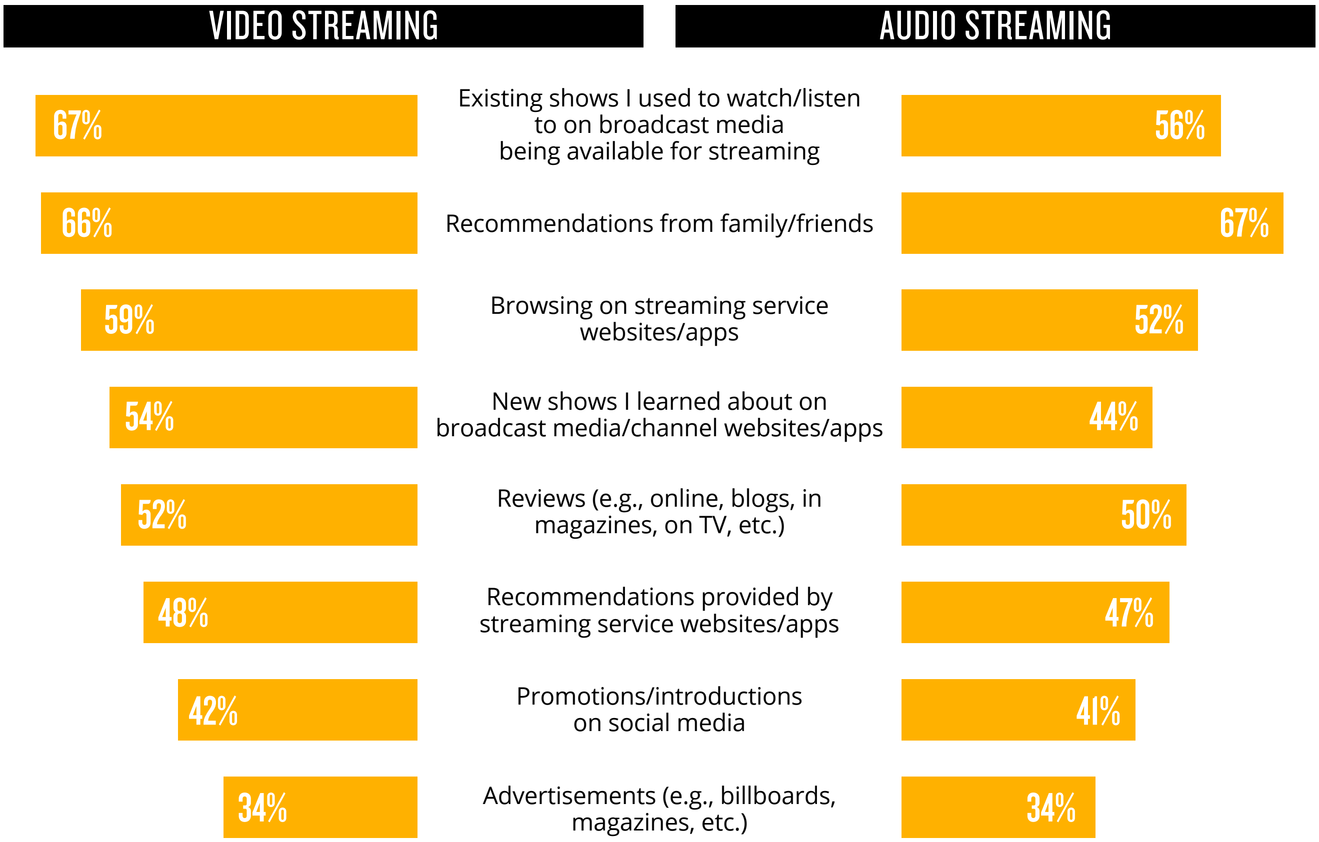
As streaming continues to grow in popularity, the library of video and audio content available at any time is growing at an exponential rate. At times the act of simply choosing what to watch or listen to from a seemingly never-ending list can turn into a time consuming process.

What factors are most influential for users as they explore content and decide what to watch and listen to through their streaming services? According to the Q3 2018 Nielsen MediaTech Trender, a quarterly consumer tracking survey concentrating on emerging technology devices and services, people more often than not still refer back to traditional measures in this new world. Two-thirds of audio (67%) and video streaming (66%) users are influenced by recommendations from family and friends. When not getting solicited (or unsolicited) advice from others, users tend to look inward at their own personal history. Sixty-seven percent of video streaming users and 56% of audio streaming users refer back to existing programming they used to watch or listen to on broadcast media and are revisiting now that the content is more accessible.

Streaming services are helping to perpetuate their own usage as well. Fifty-nine percent of video and 52% of audio streaming users are influenced by browsing the menus of their services, and nearly half of users are influenced by the recommendations provided by those sites and apps.

THINGS THAT INFLUENCE WHICH CONTENT TO WATCH/LISTEN TO ON STREAMING SERVICES

How influential are each of the following you might use to explore or decide which content to consume on video / audio streaming services?



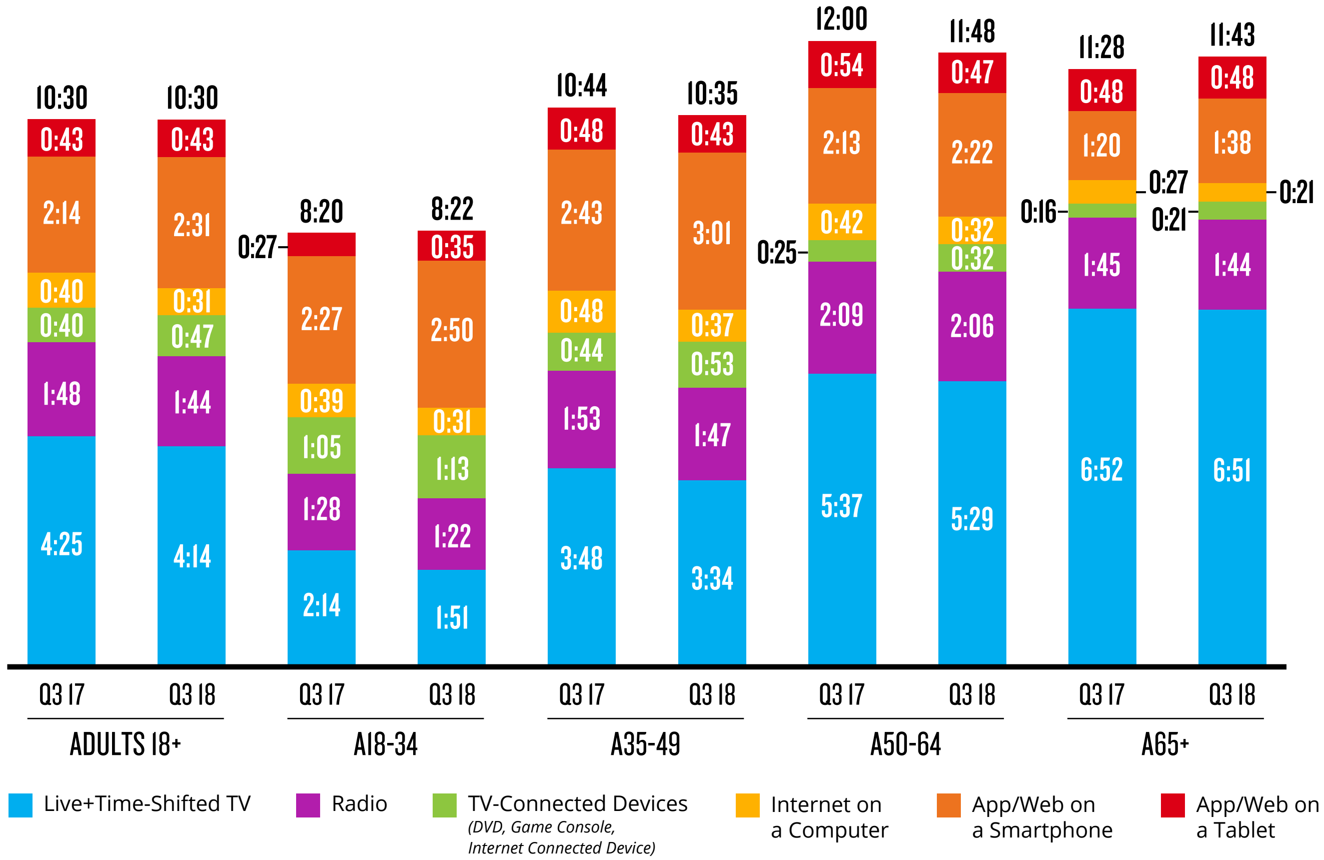
MEDIA TIME BY DEMOGRAPHIC

While time spent across all platforms has remained steady at 10 hours and 30 minutes since Q3 2017, some interesting patterns are emerging across different age groups that hint at the future of media usage. Time spent per day increased among adults age 18-34 and 65+ but decreased year-over-year among adults 35-49 and 50-64. Additionally, time spent on TV-connected devices and app/web on smartphones increased across all demographic groups. Time per day on smartphones increased by 23 minutes for both adults 18-34—more than any other group or platform, while live+time-shifted TV and Internet on a computer experienced the largest declines across all age groups.

ADULTS 50-64 SPEND MORE TIME PER DAY ON MEDIA THAN ANY OTHER AGE GROUP

DAILY HOURS:MINS OF USAGE

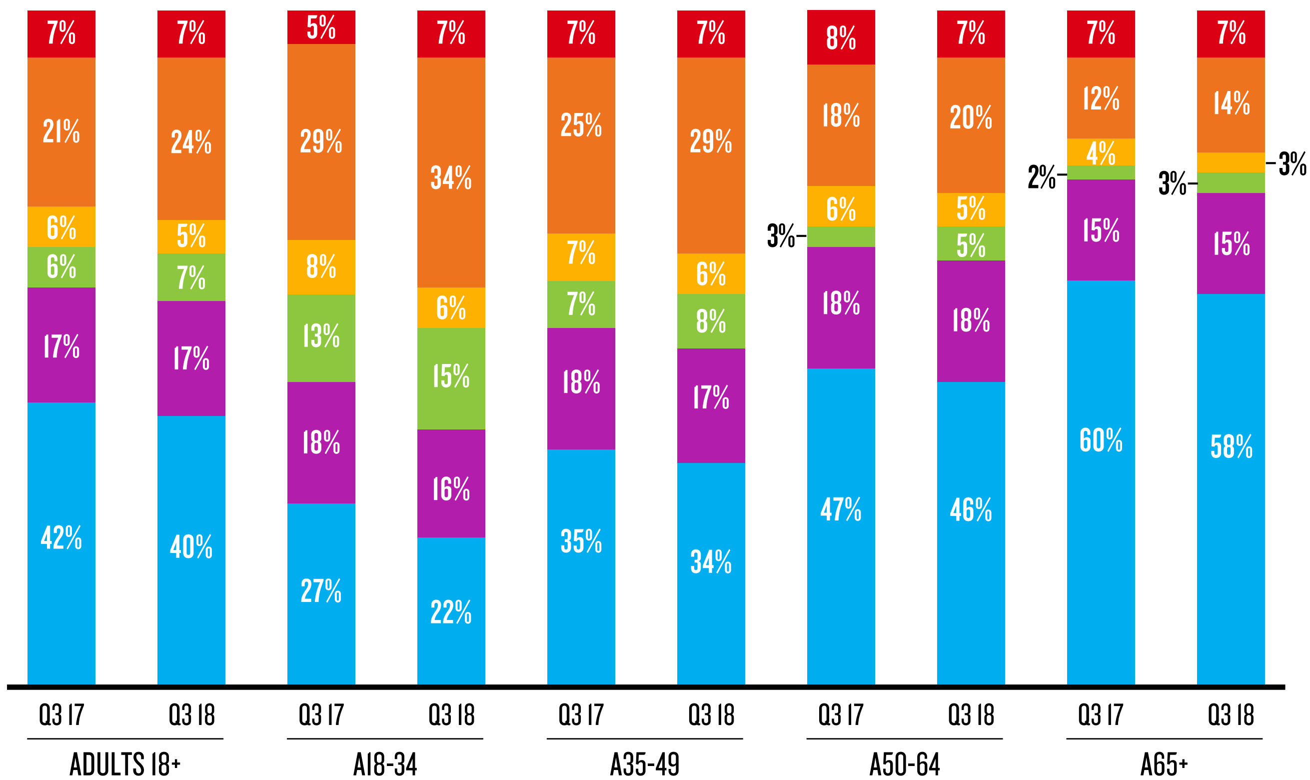
BASED ON TOTAL U.S. POPULATION



Examining the share of time spent on each platform by age gives additional insights into how users are consuming media. Adults 18-34 spend 47% of their time on digital platforms and 37% watching TV and TV-connected devices, compared to 42% digital and 40% TV and TV-connected devices in Q3 2017. Adults ages 50-64, who spend the most overall time across all platforms of any age group, spend 51% of their time watching TV and TV-connected devices and 31% on digital platforms. Regardless of age, tablet usage makes up 7% of time across all groups while radio consistently accounts for between 15 and 18% of daily media use.

SHARE OF DAILY TIME SPENT BY PLATFORM

BASED ON TOTAL U.S. POPULATION



Live+Time-Shifted TV | Radio | TV-Connected Devices *(DVD, Game Console, Internet Connected Device)* | Internet on a Computer | App/Web on a Smartphone | App/Web on a Tablet

ADULTS 18-34 SPEND OVER ONE-THIRD OF THEIR DAILY MEDIA USAGE ON SMARTPHONES

THE MULTICULTURAL CONSUMER

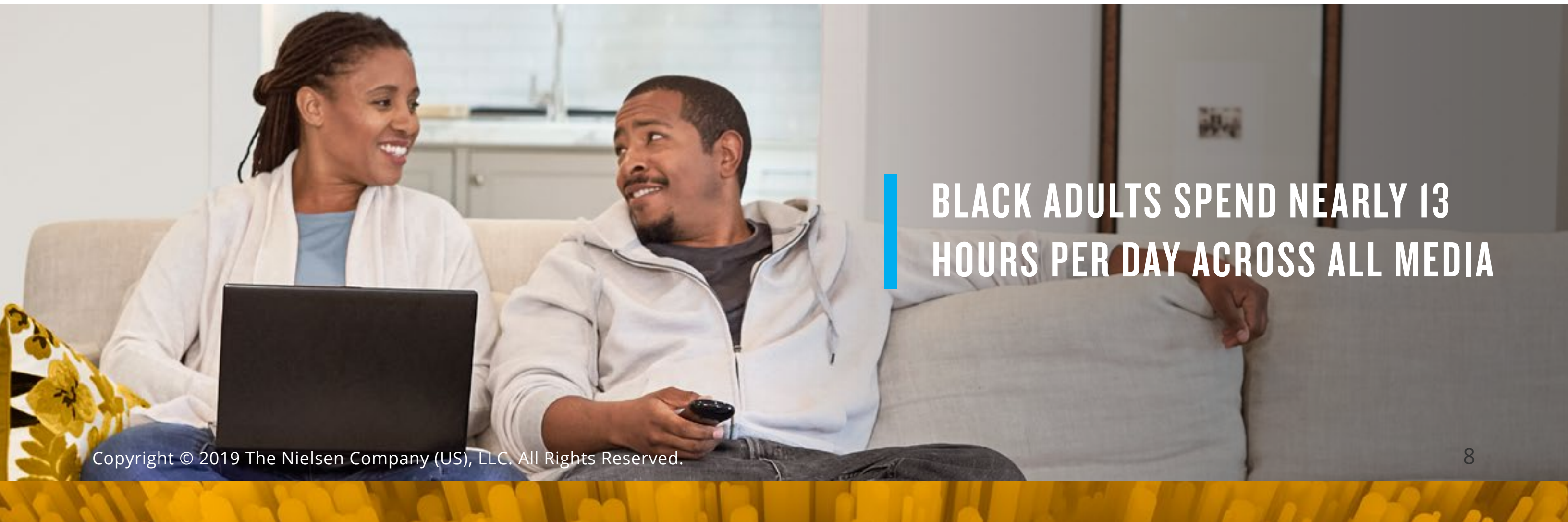
One of the many ways that racial and ethnic diversity across the U.S. can be highlighted is through media usage. While every individual has their own unique habits, at a higher level across groups there are notable differences in media usage as well as some striking similarities when analyzing trends over time. Much like total U.S. adults, time spent among Hispanic and Asian Americans were equal to Q3 2017, albeit with some changes in how that total was accumulated. Hispanics spent 22 additional minutes on smartphones and 10 additional minutes per day on TV-connected devices than the year prior. Asian Americans spent 1 hour and 51 minutes per day on live TV in Q3 2018, the same as Q3 2017, while time spent on Internet connected devices increased from 29 to 34 minutes. Black adults continued to spend more time than any other group with media at 12 hours and 58 minutes per day, which is 23% more time than the average adult. They spend more time than any other group on TVs, TV-connected devices, smartphones, and tablets.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION – Q3 2018

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	Q3 2017	Q3 2018	Q3 2017	Q3 2018	Q3 2017	Q3 2018	Q3 2017	Q3 2018
Live TV	3:54	3:44	5:49	5:31	3:04	2:45	1:51	1:51
Time-shifted TV	0:31	0:30	0:31	0:30	0:19	0:17	0:15	0:14
Radio	1:48	1:44	1:55	1:49	1:55	1:49	N/A	N/A
DVD/Blu-Ray Device	0:06	0:05	0:07	0:06	0:05	0:04	0:03	0:03
Game Console	0:13	0:13	0:15	0:16	0:14	0:13	0:09	0:08
Internet Connected Device	0:21	0:29	0:24	0:32	0:22	0:32	0:29	0:34
Internet on a Computer	0:40	0:31	0:39	0:28	0:28	0:23	0:51	0:38
App/Web on a Smartphone	2:14	2:31	2:46	3:02	2:13	2:35	2:22	2:35
App/Web on a Tablet	0:43	0:43	0:42	0:44	0:37	0:39	0:46	0:43
Total	**10:30**	**10:30**	**13:08**	**12:58**	**9:17**	**9:17**	**6:46***	**6:46***

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



BLACK ADULTS SPEND NEARLY 13 HOURS PER DAY ACROSS ALL MEDIA

Black adults are spending 7 hours 25 minutes per day on total video usage, which is more than 2 hours greater than the average adult. This total includes 54 minutes per day with TV-connected devices, which is 9 minutes more than in Q3 2017. Hispanic TV-connected device usage increased by 8 minutes year-over-year while video focused app/web on a smartphone grew by 55% to 17 minutes per day. Asian Americans spend the least amount of time with video, but digital accounts for the highest percentage of their viewing at 13%.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

BASED ON TOTAL U.S. POPULATION – Q3 2018

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	Q3 2017	Q3 2018	Q3 2017	Q3 2018	Q3 2017	Q3 2018	Q3 2017	Q3 2018
Live+Time-shifted TV	4:25	4:13	6:20	6:01	3:23	3:03	2:06	2:05
TV-Connected Devices	0:40	0:47	0:45	0:54	0:41	0:49	0:41	0:44
Video on a Computer	0:10	0:07	0:13	0:08	0:10	0:07	0:14	0:09
Video Focused App/Web on a Smartphone	0:08	0:11	0:14	0:17	0:11	0:17	0:08	0:10
Video Focused App/Web on a Tablet	0:04	0:06	0:04	0:05	0:07	0:09	0:05	0:06
Total	**5:27**	**5:24**	**7:36**	**7:25**	**4:32**	**4:25**	**3:14**	**3:14**

Unlike video consumption, social media usage is more consistent across different races and ethnicities with little year-over-year change. Black adults are spending the most time on social networks at 49 minutes per day, with Hispanics at 48 minutes and Asian Americans slightly over-indexing at 46 minutes per day. Hispanics spend the most time using social media on their smartphones at 42 minutes per day, which is 88% of their total usage and the highest of any group.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON SOCIAL NETWORKING

BASED ON TOTAL U.S. POPULATION – Q3 2018

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	Q3 2017	Q3 2018	Q3 2017	Q3 2018	Q3 2017	Q3 2018	Q3 2017	Q3 2018
Computer	0:05	0:04	0:04	0:03	0:03	0:02	0:07	0:05
Smartphone	0:35	0:35	0:40	0:40	0:40	0:42	0:37	0:36
Tablet	0:06	0:06	0:05	0:06	0:04	0:04	0:06	0:05
Total	**0:46**	**0:45**	**0:49**	**0:49**	**0:47**	**0:48**	**0:50**	**0:46**

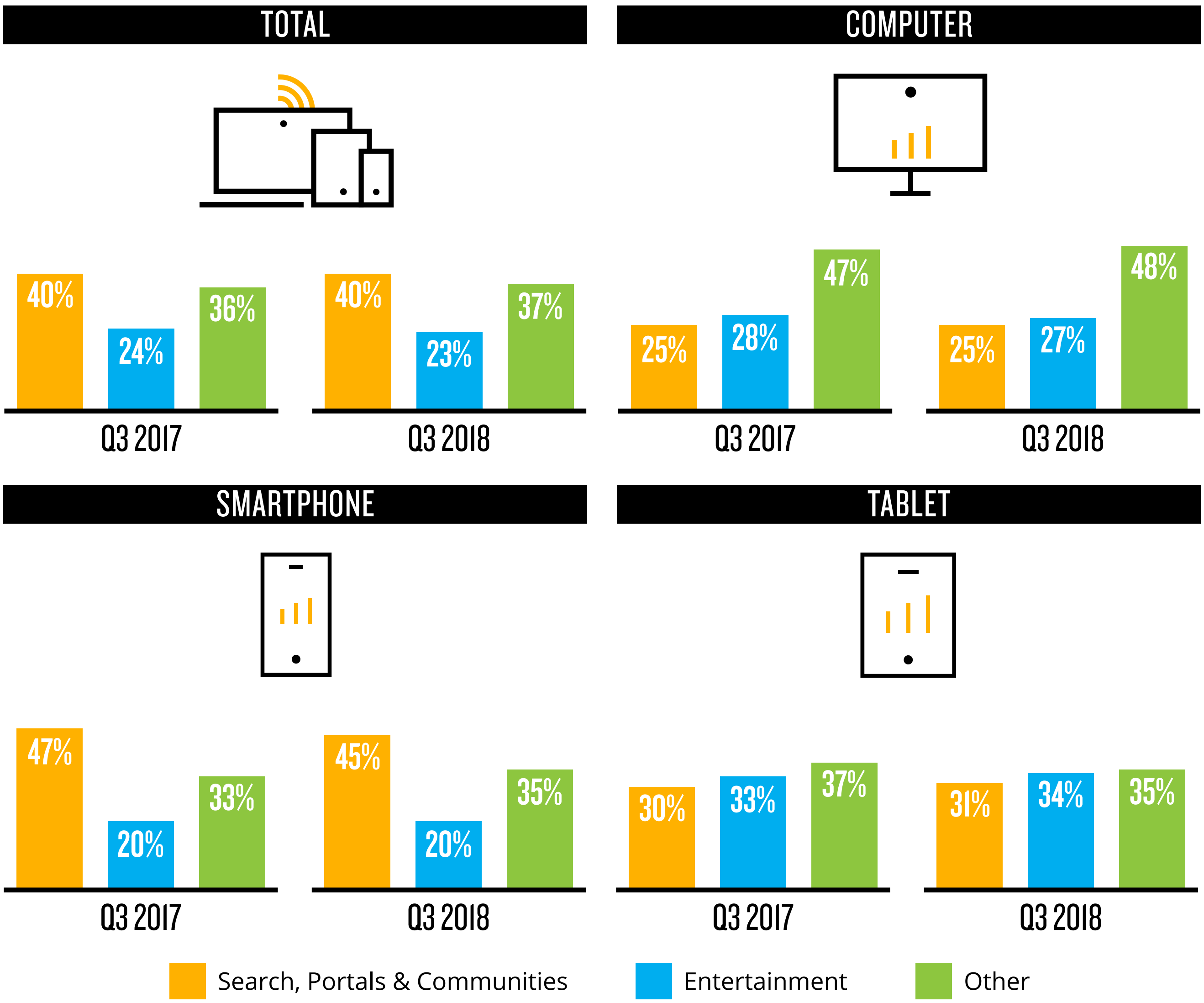
DIGITAL USAGE BY CATEGORY

Digital usage is increasing year-over-year, with time spent on computers, smartphones, and tablets totaling 3 hours and 45 minutes per day in Q3 2018. What are people doing on these devices all day, and how does that usage differ by device type?

The Search, Portals & Communities and Entertainment categories combine to account for 63% of all time spent on digital devices. Entertainment is the most popular category on computers and tablets, with share of time spent on tablets increasing to 34% in Q3 2018. Search, Portals & Communities is the most heavily used category on smartphones at 45% of all time spent.

SHARE OF TIME SPENT BY CATEGORY PER ADULT 18+

BASED ON TOTAL U.S. POPULATION

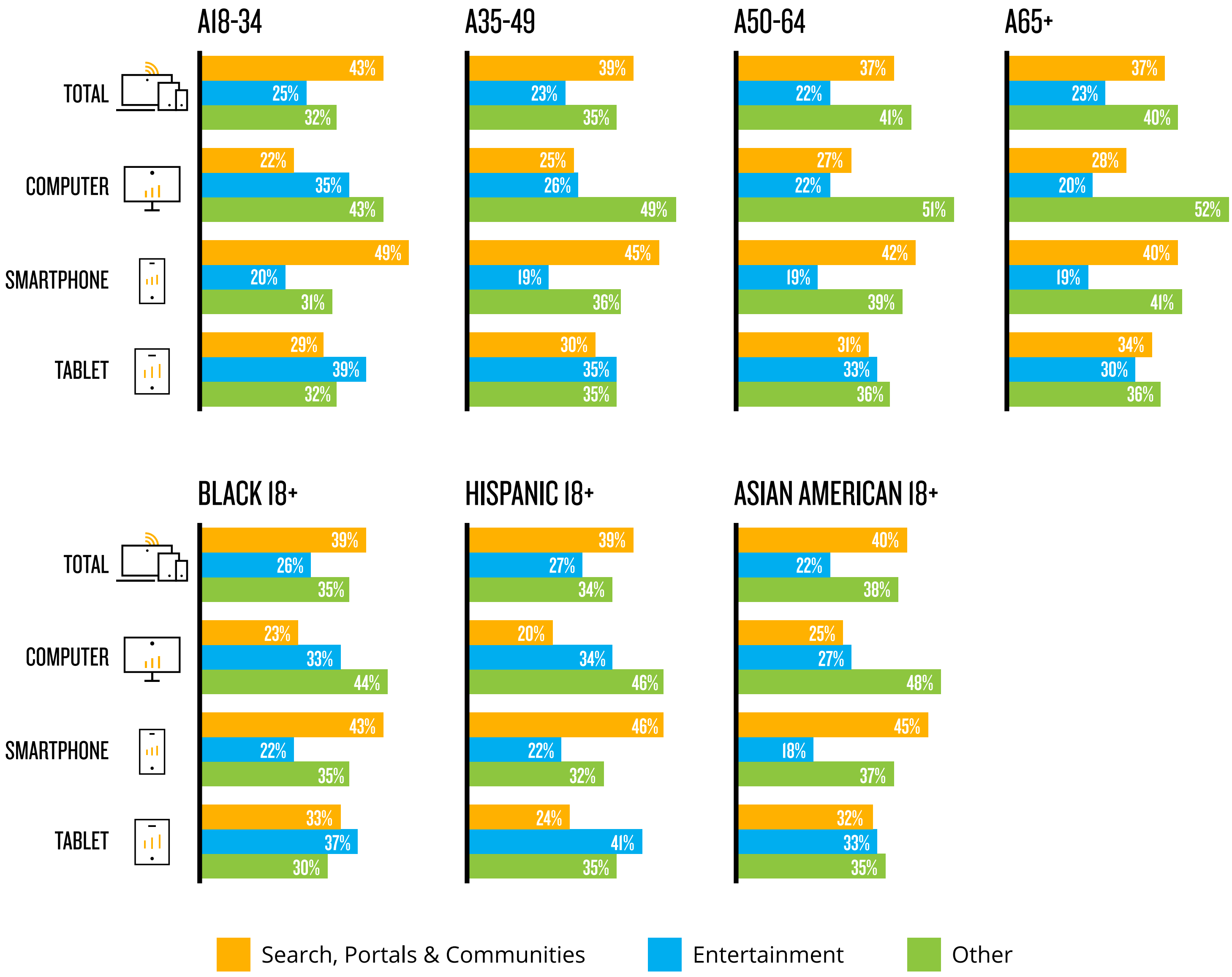


When looking at digital usage by age some clear patterns emerge. The share of time spent on Search, Portals & Communities and Entertainment decreases with age, but even adults 65+ spend 60% of their time on sites and apps in those two categories. Adults 18-34 spend 43% of total digital time on Search, Portals & Communities and 25% on Entertainment.

The share of time spent across all digital categories is also consistent across adults of different races and ethnicities. Asian Americans spend 40% of their time on Search, Portals & Communities, more than any other group, while Hispanics spend more time on Entertainment at 27%. Black, Hispanic, and Asian American adults all over-index on these two categories compared to all U.S. adults.

SHARE OF TIME SPENT BY CATEGORY

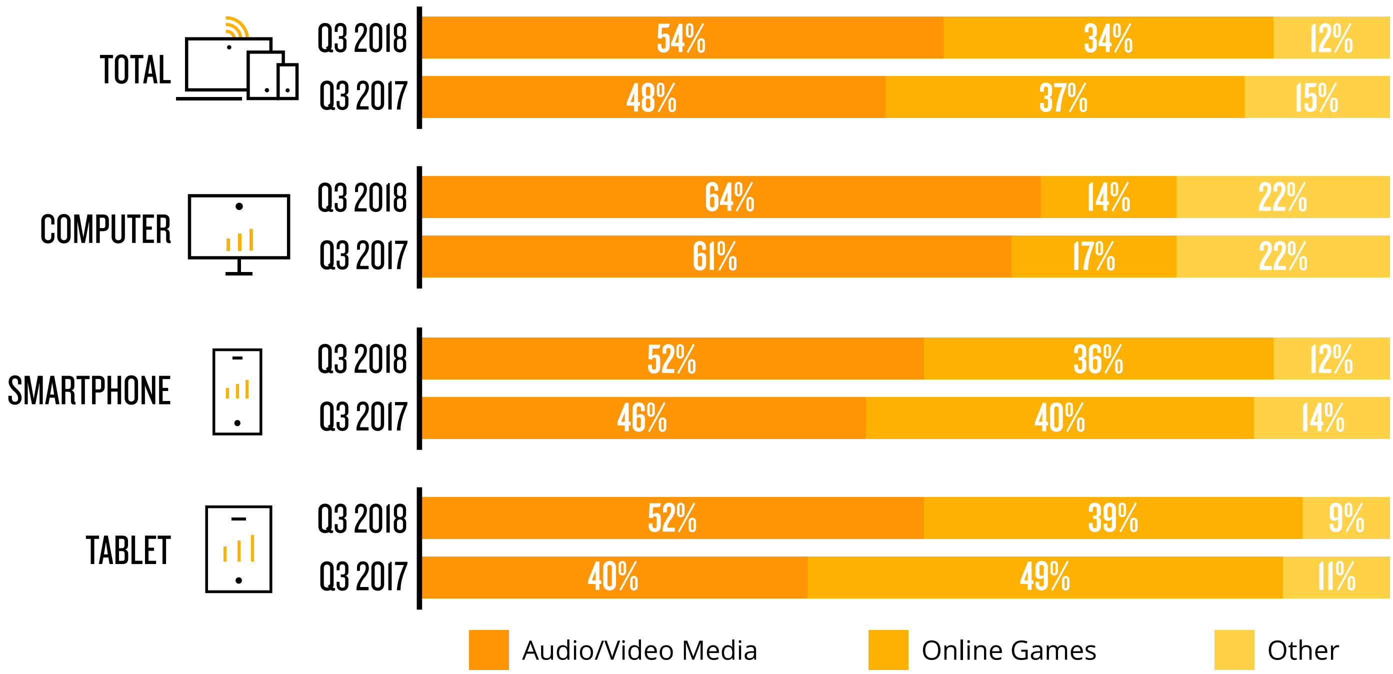
BASED ON TOTAL U.S. POPULATION



As a category, “Entertainment” is certainly popular but what types of content are driving that usage? Across digital devices audio/video media and online games comprise 88% of total time spent on entertainment, up from 85% in Q3 2017. Gaming is more popular on smartphones (36%) and tablets (39%), compared to just 14% on computers. However, audio/video media is the most popular on computers at 64% of time spent.

SHARE OF TIME SPENT BY ENTERTAINMENT SUBCATEGORY

BASED ON TOTAL U.S. POPULATION



When looking at the Entertainment subcategory in more detail by age, adults 18-34 spend 70% of their time on audio/video media and 20% on online games. In contrast, adults 65+ spend 36% of their time on audio/video media and 48% on gaming. Hispanic adults have the highest share of time spent on video at 69% while Asian American adults spend one-third of their entertainment time on gaming.

SHARE OF TIME SPENT BY ENTERTAINMENT SUBCATEGORY

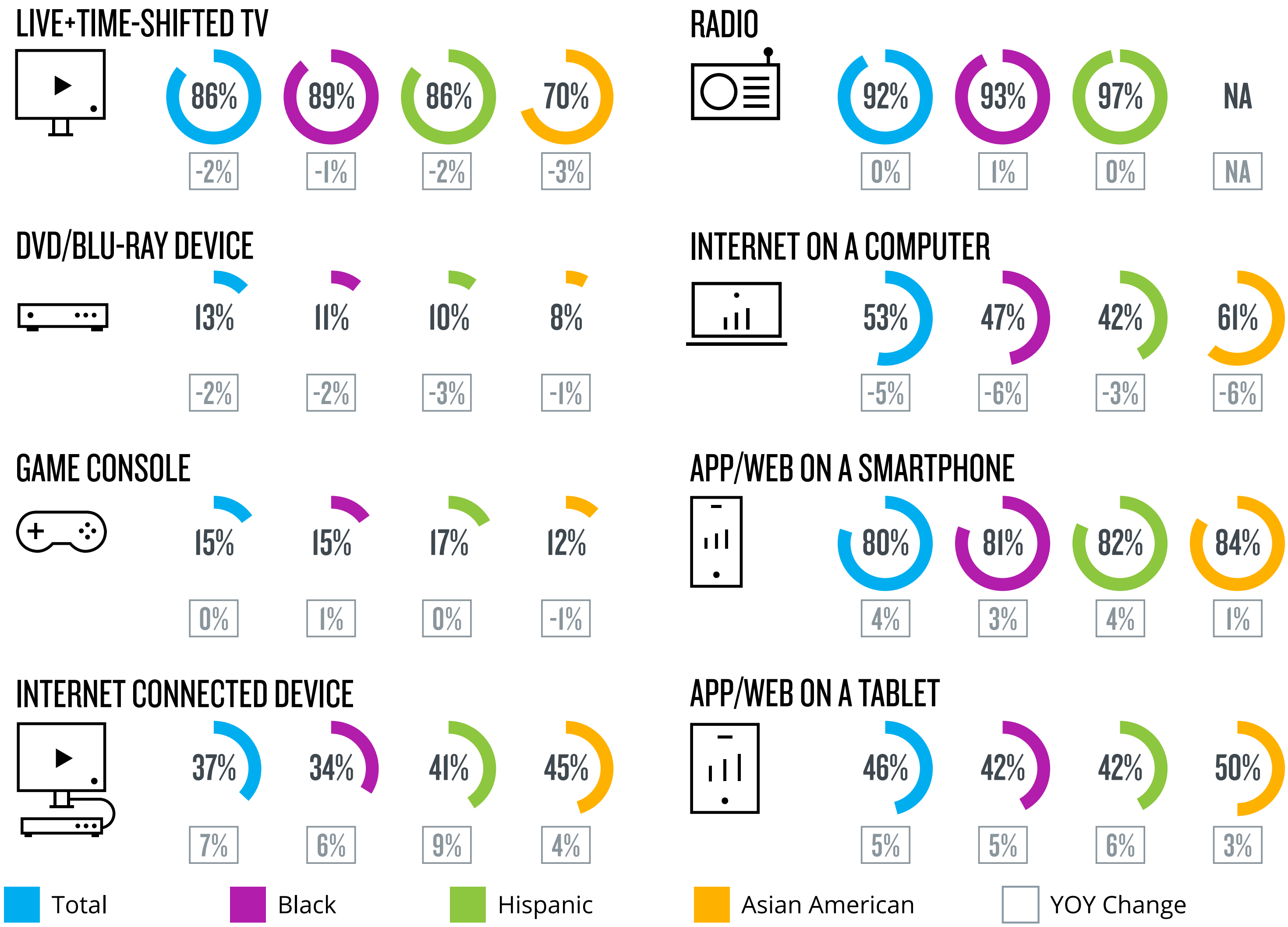
BASED ON TOTAL U.S. POPULATION

	AUDIO/VIDEO MEDIA	ONLINE GAMES	OTHER
A18+	54%	34%	12%
A18-34	70%	20%	10%
A35-49	53%	34%	13%
A50-64	42%	44%	14%
A65+	36%	48%	16%
Black 18+	61%	28%	11%
Hispanic 18+	69%	22%	9%
Asian American 18+	54%	33%	13%

WEEKLY REACH ACROSS PLATFORMS

Linear platforms still reach the greatest number of U.S. adults each week. While live+time-shifted TV reach is still robust, it has declined to 86% from 88% in Q3 2017. Radio Reach has remained steady and is the highest across all platforms at 92%. Radio reach is even higher among Hispanic adults, at 97%. Internet connected devices experienced the greatest year-over-year increase, rising from 30% to 37% in Q3 2018. Across all platforms, the largest year-over-year declines came from Internet on a computer usage, which dropped to 53% from 58%, but app/web on a smartphone reach grew from 76% to 80% while app/web on a tablet increased to 46% from 41%. People are readjusting their habits and aligning them to match their preferred devices, but the time spent on media has remained consistent throughout the past year.

Q3 2018 WEEKLY REACH % OF USERS 18+ AMONG U.S. POPULATION



	TOTAL	BLACK	HISPANIC	ASIAN AMERICAN
A18+ Total Universe (millions)	248	31	39	16
% of A18+ Total Universe		13%	16%	7%

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

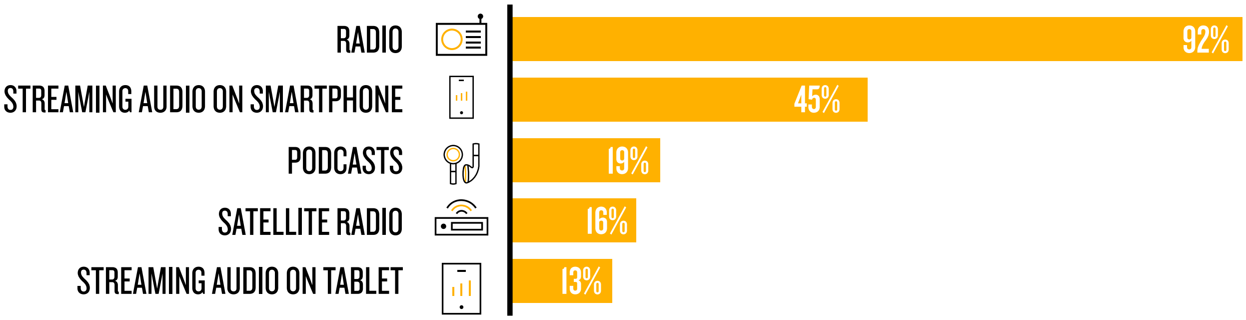
THE AUDIO UNIVERSE

The audio market is expanding as a result of increased accessibility and emerging technology. Radio is at the center of that universe, as it reaches more Americans each week (92%) than any other media platform. Smartphones are now used more than ever to stream audio content, while podcasts (19%) and satellite radio (16%) continue to gain prominence.

92% OF U.S. ADULTS LISTEN TO RADIO EACH WEEK

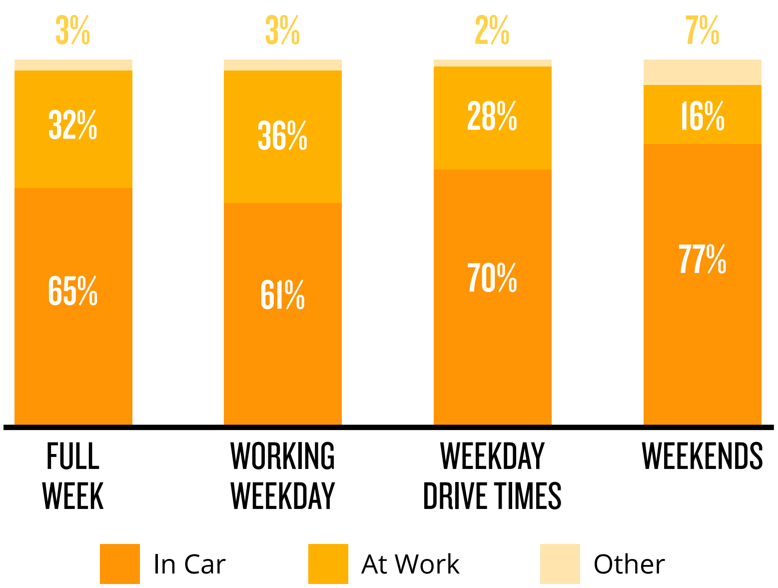
WEEKLY REACH OF AUDIO AMONG ADULTS 18+

BASED ON TOTAL U.S. POPULATION - Q3 2018



One reason radio maintains its broad reach is due to high usage occurring away from the home. Automobiles are the most significant listening location, as 65% of all non-home radio use occurs there. That number increases to 77% on weekends. Nearly one-third of non-home listening also occurs at work, where consumers can multitask while they carry out their jobs.

AWAY-FROM-HOME RADIO USE, BY LOCATION



Source: Nielsen National Regional Database, Spring 2018

TYPES OF TELEVISION HOUSEHOLDS

Television households today are evolving in a similar fashion to the content they deliver, with an emphasis on "choice". Consumers now have more viable choices than ever on how to access TV content in terms of both device and delivery method. Despite this evolution, the Nielsen definition of a television household as one that can view content on a television set remains consistent.

Over 76% of TV households subscribe to a traditional cable service only, and 3.7% more subscribe to a virtual multichannel video programming distributor (vMVPD). All together, 8 in 10 homes are considered multichannel homes and have access to cable programming. Hispanic households are most likely to be over the air homes at 20.9%. vMVPD penetration among Asian American households is 7%, although their total multichannel reach under indexes. Fourteen percent of homes that subscribe to a vMVPD also subscribe to traditional cable services, 34% are over-the-air, and 52% are broadband-only households.

vMVPDS EXIST IN 3.7% OF ALL TV HOUSEHOLDS AS OF SEPTEMBER 2018

TELEVISION DISTRIBUTION STATUS

% OF TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	SEP 2017	SEP 2018	SEP 2017	SEP 2018	SEP 2017	SEP 2018	SEP 2017	SEP 2018
Traditional Cable	80.4%	76.4%	78.1%	74.6%	73.4%	68.5%	72.2%	65.3%
vMVPD	1.7%	3.7%	1.7%	3.5%	1.4%	3.4%	2.9%	7.0%
Over-the-Air	12.7%	12.9%	16.5%	16.6%	20.0%	20.9%	14.7%	14.1%
Broadband-Only	5.2%	7.0%	3.7%	5.2%	5.2%	7.2%	10.2%	13.6%
Total Multichannel	**82.1%**	**80.1%**	**79.8%**	**78.1%**	**74.8%**	**71.9%**	**75.1%**	**72.3%**

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

DEVICES AND SERVICES IN THE HOUSEHOLD

The way we access content is shifting, so it also stands to reason that the devices we use to consume that content are going through similar changes. Enabled smart TV penetration grew to 41% in September 2018 from 32% in September 2017 as users continue to replace their older television sets. Internet connected device penetration also increased to 39% in September 2018 from 35% the year prior. DVD/Blu-ray player penetration dropped to 65%, down from 70% in September 2017.

The growth of digital device ownership has also slowed, as the rapid gains in penetration of years past have slowed due to mass adoption. Computer ownership remained flat at 79% from September 2017 to September 2018, while smartphones increased to 90% from 88% and tablets to 64% from 63%.

Among multicultural homes, Asian Americans are most likely to own a variety of devices. They have the highest penetration of enabled smart TVs, internet connected devices, computers, smartphones, and tablets. Hispanics homes have the highest game console penetration and over-index with respect to both streaming capable and mobile devices. Enabled smart TV ownership in Black households grew by 29% year-over-year to 38% in September 2018, and they also over-index on smartphone, game console, and internet connected devices.

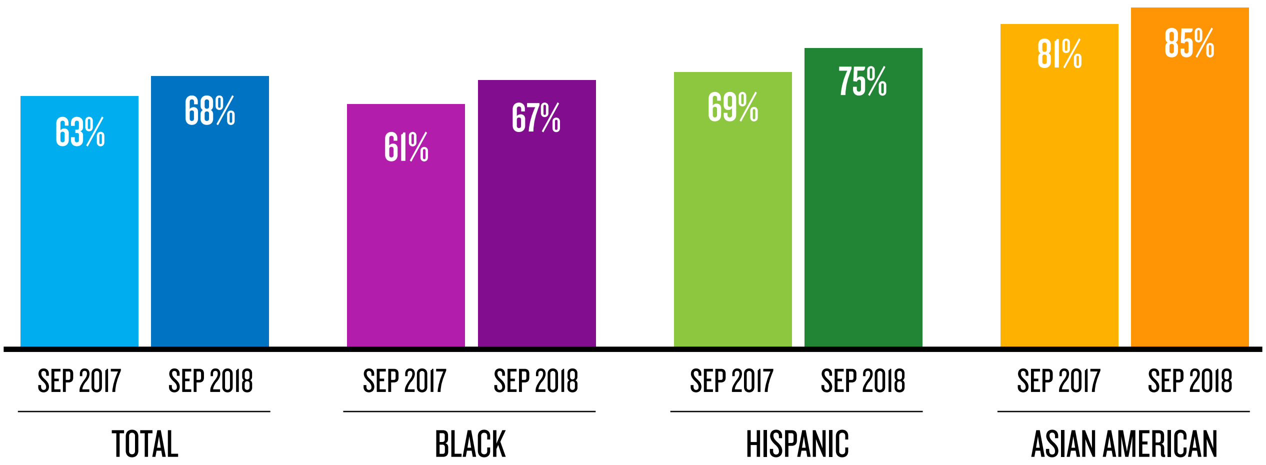
ENABLED SMART TV OWNERSHIP HAD THE LARGEST YEAR-OVER-YEAR GROWTH FOR ALL RACE AND ETHNICITIES

DEVICE OWNERSHIP % IN TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	SEP 2017	SEP 2018	SEP 2017	SEP 2018	SEP 2017	SEP 2018	SEP 2017	SEP 2018
DVD/Blu-ray Player	70%	65%	65%	58%	62%	56%	56%	52%
DVR	55%	55%	53%	54%	48%	50%	48%	47%
Enabled Smart TV	32%	41%	29%	38%	38%	49%	46%	52%
Internet Connected Device	35%	39%	36%	40%	38%	40%	54%	57%
Game Console	42%	42%	42%	43%	52%	52%	45%	47%
Computer	79%	79%	68%	68%	70%	70%	91%	88%
Smartphone	88%	90%	90%	92%	95%	95%	96%	96%
Tablet	63%	64%	57%	57%	62%	62%	75%	75%

Internet enabled TV-connected devices — enabled smart TVs, internet connected devices (i.e. Apple TV, Roku, Google Chromecast, Amazon Fire TV), and enabled game consoles — can also be found in 68% of U.S. households, up from 63% in September 2017. Asian American households have the highest penetration at 85%, while three-fourths of Hispanic and two-thirds of Black households also own at least one internet enabled TV-connected device.

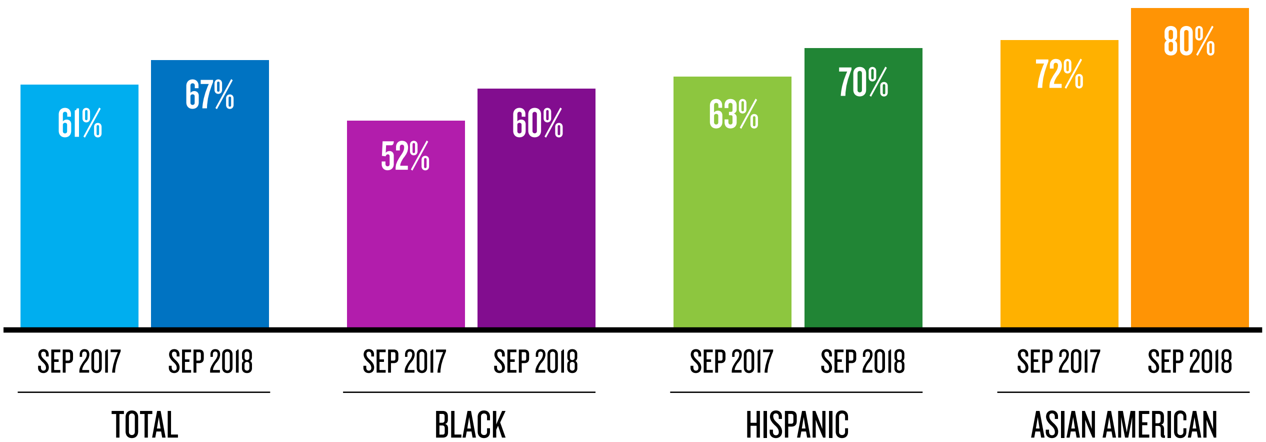
INTERNET ENABLED TV-CONNECTED DEVICES HOUSEHOLD ACCESS %



Subscription-based video on demand (SVOD) services such as Netflix, Hulu, and Amazon Prime can be accessed through Internet enabled TV-connected devices, so it is not surprising that SVOD penetration closely mirrors that of those devices. As users gain the ability to access SVOD content, they are taking the opportunity to sample one or more of these services. It's critical that the industry know the relationship between the streaming services, the devices that empower users to access streaming content, and how both might impact the broader content landscape.

SVOD content is now available in 67% of television households, compared to 61% one year ago. Year-over-year growth is also occurring among households of all races and ethnicities. Eight out of 10 Asian American, seven out of 10 Hispanic, and six out of 10 Black households subscribe to an SVOD service.

SUBSCRIPTION VIDEO ON DEMAND HOUSEHOLD ACCESS %



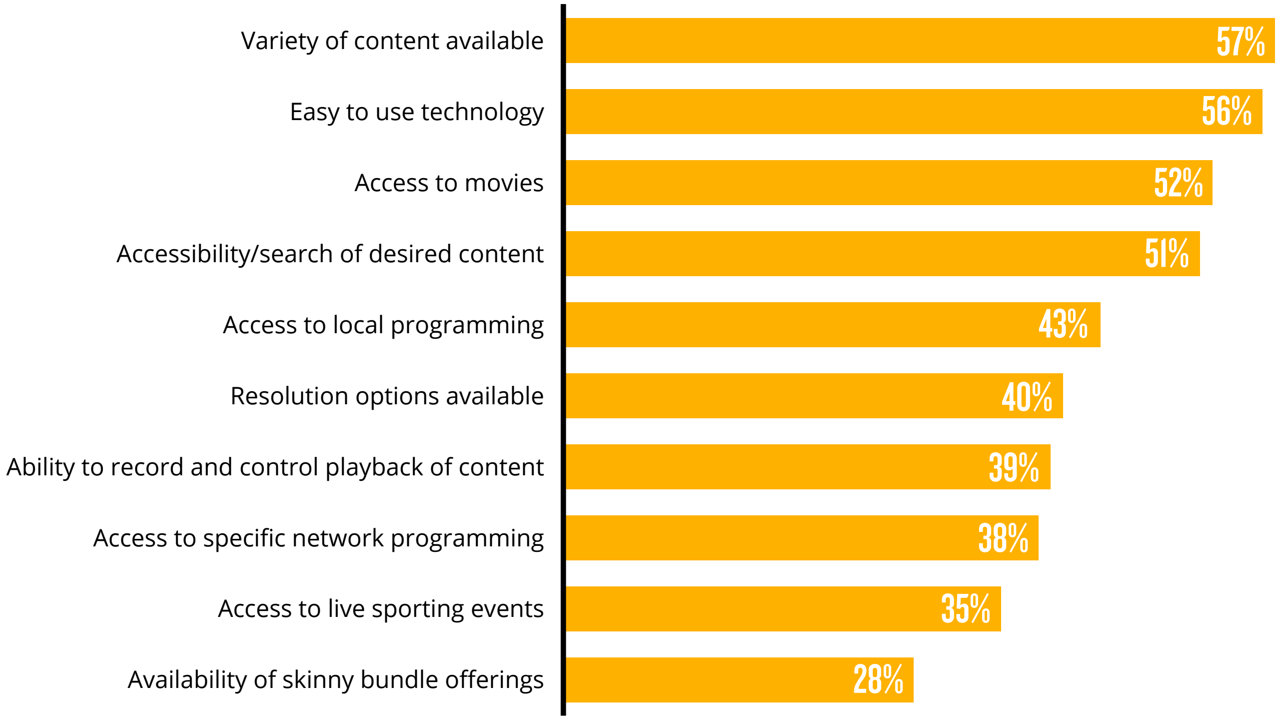
THE EVOLUTION OF TELEVISION

The number of SVOD households is growing, but so is the number of services and options available to as more players enter the market. With each entry competing for our hard-earned money and a share of our finite amount of free time, it is crucial to examine which attributes of streaming services are most important to consumers.

According to the Q3 2018 Nielsen MediaTech Trender, users want access to a broad variety of content (57%) while using technology and an interface that is easy to navigate (56%). Niche content is also desirable, as 43% want access to local programming, 38% are looking for specific networks, and 35% want the ability to stream live sports.

IMPORTANCE OF ATTRIBUTES FOR A VIDEO STREAMING SERVICE

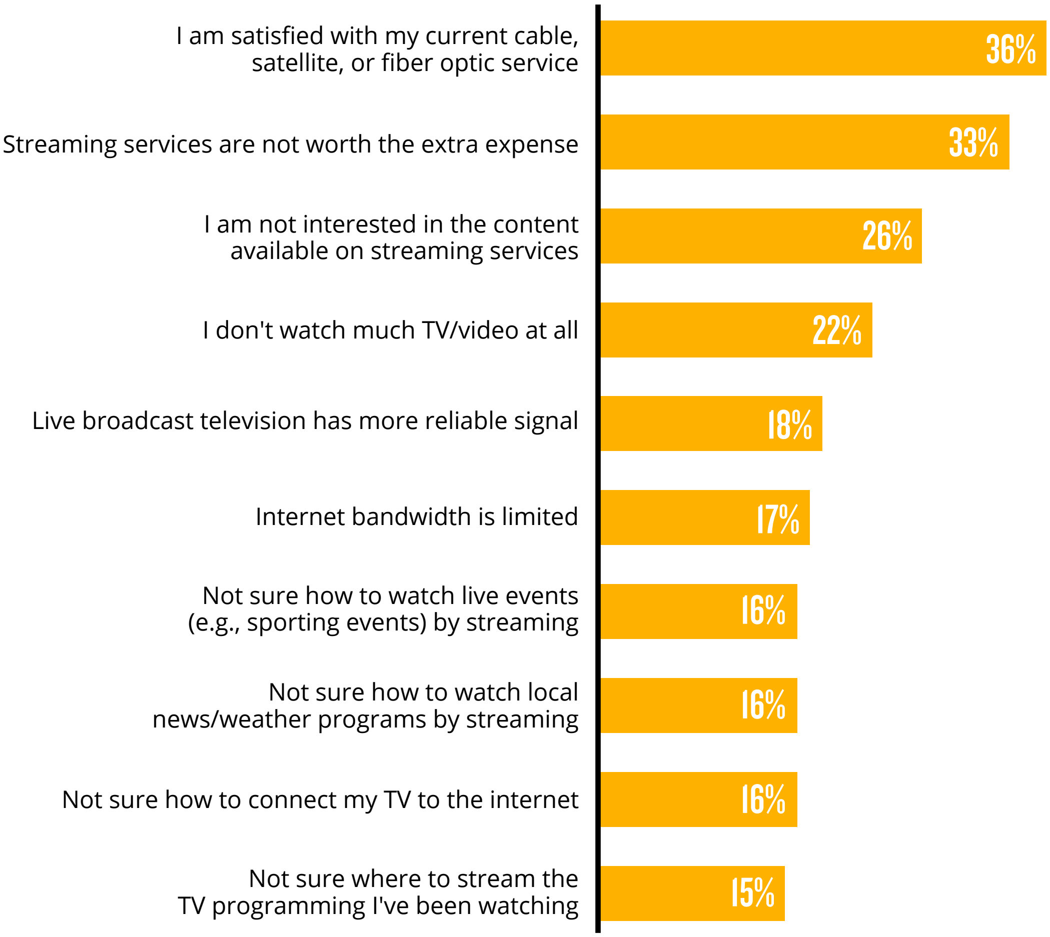
Regardless of what methods you currently use to watch TV or videos, if you have to rely on streaming, how important is each of the following attributes of video streaming services for you?



Of course, not *everyone* is ready to become an SVOD subscriber quite yet. Among those who do not intend to subscribe, 36% are satisfied with their current services, with 19% citing that as the most important factor. One-third believe that streaming services are not worth the expense, and 26% are not interested in the content. Awareness and technical limitations are also reasons why people do not subscribe, whether that be through not knowing how to use devices, locate the content they want to watch, or by having sufficient internet bandwidth. Correcting those issues could potentially lead to additional interest in and usage of SVOD services.

BARRIERS TO USING A VIDEO STREAMING SERVICE

You mentioned that you do not intend to start or subscribe to video streaming services. Why?



DATA TABLES

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

Q3 2018 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	35:02	21:31	31:10	42:09	50:24	25:53	29:55	48:28	27:05	19:46
Live+Time-Shifted TV	29:32	12:58	24:59	38:23	47:59	18:24	23:06	42:07	21:19	14:35
Time-Shifted TV	3:27	1:34	3:30	4:30	4:47	2:26	3:04	3:31	2:01	1:38
TV-Connected Devices	5:30	8:33	6:11	3:45	2:25	7:29	6:49	6:21	5:46	5:10
DVD/Blu-ray Device	0:35	0:32	0:40	0:39	0:30	0:35	0:39	0:39	0:27	0:22
Game Console	1:33	3:33	1:29	0:25	0:09	2:37	1:56	1:55	1:34	0:53
Internet Connected Device	3:22	4:28	4:02	2:41	1:46	4:17	4:14	3:47	3:44	3:55
Radio	12:07	9:34	12:30	14:41	12:08	10:54	12:05	12:46	12:45	na
Internet on a Computer	3:36	3:38	4:20	3:46	2:28	3:57	4:12	3:15	2:39	4:29
Social Networking	0:29	0:24	0:36	0:33	0:22	0:30	0:34	0:23	0:15	0:35
Video on a Computer	0:47	1:05	1:00	0:36	0:18	1:03	1:02	0:58	0:51	1:01
App/Web on a Smartphone	17:35	19:50	21:08	16:33	11:27	20:26	20:32	21:17	18:06	18:02
Video Focused App/Web	1:15	2:02	1:21	0:52	0:27	1:43	1:31	2:00	1:59	1:08
Streaming Audio	0:29	0:44	0:36	0:21	0:11	0:40	0:36	0:41	0:33	0:33
Social Networking	4:07	5:45	4:53	3:14	2:00	5:21	4:58	4:39	4:57	4:10
App/Web on a Tablet	4:58	4:02	5:03	5:28	5:33	4:30	4:52	5:07	4:31	5:02
Video Focused App/Web	0:43	0:55	0:49	0:32	0:29	0:53	0:50	0:38	1:04	0:43
Streaming Audio	0:06	0:07	0:07	0:05	0:03	0:07	0:07	0:47	0:06	0:06
Social Networking	0:39	0:31	0:39	0:42	0:44	0:34	0:38	0:40	0:30	0:38

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

Q3 2018 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	36:29	23:19	31:30	42:30	51:15	27:17	30:46	48:37	27:53	22:59
Live+Time-Shifted TV	32:10	15:18	26:16	39:19	49:07	20:46	25:01	43:27	23:02	18:43
Time-Shifted TV	6:39	3:37	5:55	7:50	9:29	4:52	5:32	6:27	4:45	4:23
TV-Connected Devices	9:58	12:54	9:35	7:48	6:48	11:23	10:35	11:49	9:46	9:14
DVD/Blu-ray Device	4:10	5:02	4:09	4:09	3:27	4:32	4:29	5:17	4:09	3:59
Game Console	9:41	11:51	7:38	5:55	5:17	10:20	9:06	11:25	8:17	7:33
Internet Connected Device	8:20	9:15	8:11	7:40	7:24	8:45	8:40	10:01	8:18	8:16
Radio	13:14	10:38	13:20	15:40	13:48	11:53	12:59	13:47	13:12	na
Internet on a Computer	6:46	6:47	7:21	6:49	5:34	7:03	7:17	6:55	6:14	7:15
Social Networking	1:53	1:32	2:00	2:08	1:53	1:46	1:56	1:49	1:25	1:54
Video on a Computer	3:18	4:04	3:35	2:41	2:04	3:50	3:44	4:11	4:15	3:32
App/Web on a Smartphone	21:59	23:01	23:52	20:29	19:36	23:24	23:24	26:19	22:12	21:39
Video Focused App/Web	2:01	2:47	1:51	1:33	1:12	2:22	2:06	2:58	2:56	1:46
Streaming Audio	1:05	1:15	1:07	0:57	0:46	1:12	1:07	1:24	1:07	1:10
Social Networking	5:33	7:02	5:52	4:26	3:52	6:30	6:03	6:13	6:38	5:25
App/Web on a Tablet	10:55	10:21	10:08	11:36	12:23	10:14	10:19	12:21	11:00	10:13
Video Focused App/Web	2:39	3:39	2:49	2:06	1:49	3:15	2:56	2:23	3:52	2:31
Streaming Audio	0:47	0:50	0:51	0:48	0:35	0:51	0:51	1:27	0:46	0:41
Social Networking	1:57	1:52	1:55	2:01	2:04	1:53	1:56	2:10	1:45	1:47

Q3 2018 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	222,675	59,676	55,896	59,145	47,958	115,571	112,448	28,654	35,117	12,652
Live+Time-Shifted TV	213,529	53,997	53,543	58,295	47,694	107,540	106,372	27,927	33,539	11,298
Time-Shifted TV	121,608	28,352	33,929	34,687	24,640	62,281	64,894	15,837	15,554	5,646
TV-Connected Devices	126,137	43,873	36,918	28,454	16,891	80,792	75,405	15,209	21,114	8,611
DVD/Blu-ray Device	32,224	6,683	8,960	9,482	7,100	15,643	16,669	3,455	4,012	1,363
Game Console	36,272	19,936	11,246	3,885	1,204	31,182	24,992	4,800	6,735	1,878
Internet Connected Device	92,374	31,971	28,242	20,808	11,352	60,213	57,162	10,642	16,113	7,238
Radio	227,618	66,621	57,175	59,381	44,440	123,797	116,836	28,899	37,270	na
Internet on a Computer	132,021	39,030	35,667	34,782	22,543	74,697	71,732	14,740	16,358	9,587
Social Networking	63,448	19,163	18,099	16,305	9,881	37,262	36,117	6,598	7,000	4,873
Video on a Computer	58,384	19,838	17,232	14,090	7,224	37,070	34,705	7,193	7,708	4,576
App/Web on a Smartphone	198,509	63,360	54,000	51,260	29,890	117,359	109,807	25,189	31,749	13,056
Video Focused App/Web	153,349	54,019	44,046	35,810	19,475	98,064	89,787	21,364	26,182	9,979
Streaming Audio	112,854	44,304	32,226	24,089	12,235	76,530	67,684	15,458	19,678	7,467
Social Networking	184,138	60,308	50,864	46,385	26,581	111,172	103,383	23,516	29,165	12,053
App/Web on a Tablet	112,599	28,884	30,355	30,064	23,296	59,238	59,237	12,968	16,061	7,791
Video Focused App/Web	66,307	18,511	17,887	16,466	13,443	36,398	35,716	8,436	10,815	4,408
Streaming Audio	31,130	10,510	8,443	7,015	5,162	18,953	17,765	17,336	4,789	2,194
Social Networking	82,034	20,357	20,714	22,516	18,446	41,072	41,019	9,670	11,150	5,620

Q3 2018 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%	90%	91%	90%	78%
Live+Time-Shifted TV	86%	73%	88%	92%	94%	80%	85%	89%	86%	70%
Time-Shifted TV	49%	38%	56%	55%	48%	46%	52%	50%	40%	35%
TV-Connected Devices	51%	60%	61%	45%	33%	60%	60%	48%	54%	53%
DVD/Blu-ray Device	13%	9%	15%	15%	14%	12%	13%	11%	10%	8%
Game Console	15%	27%	19%	6%	2%	23%	20%	15%	17%	12%
Internet Connected Device	37%	43%	47%	33%	22%	45%	46%	34%	41%	45%
Radio	92%	91%	94%	94%	89%	92%	94%	93%	97%	na
Internet on a Computer	53%	53%	59%	55%	44%	56%	58%	47%	42%	61%
Social Networking	25%	26%	30%	26%	19%	28%	29%	22%	19%	31%
Video on a Computer	24%	27%	29%	23%	14%	28%	28%	23%	20%	29%
App/Web on a Smartphone	80%	86%	89%	81%	58%	88%	88%	81%	82%	84%
Video Focused App/Web	62%	74%	73%	57%	38%	73%	72%	69%	68%	64%
Streaming Audio	45%	60%	53%	38%	24%	57%	54%	50%	51%	48%
Social Networking	74%	82%	84%	73%	52%	83%	83%	76%	75%	77%
App/Web on a Tablet	46%	40%	50%	48%	46%	44%	48%	42%	42%	50%
Video Focused App/Web	27%	26%	30%	26%	27%	27%	29%	27%	28%	28%
Streaming Audio	13%	14%	14%	11%	10%	14%	14%	56%	12%	14%
Social Networking	33%	28%	34%	36%	36%	31%	33%	32%	29%	36%

Q3 2018 TOTAL PERSONS, KIDS, AND TEENS

WEEKLY SUMMARY OF USAGE

TOTAL (P2+)	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	32:11	33:10	280,571	89%
Live+Time-Shifted TV	26:01	28:18	266,556	85%
Time-Shifted TV	3:02	5:58	148,988	47%
TV-Connected Devices	6:10	10:27	168,921	54%
DVD/Blu-ray Device	0:38	4:16	41,696	13%
Game Console	1:58	9:51	56,863	18%
Internet Connected Device	3:35	8:23	122,405	39%
Radio (P12+)	11:35	12:44	249,286	92%

KIDS 2-11	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	23:24	21:27	36,662	90%
Live+Time-Shifted TV	14:26	13:51	33,580	82%
Time-Shifted TV	1:41	3:09	17,805	44%
TV-Connected Devices	8:58	11:37	27,671	68%
DVD/Blu-ray Device	0:57	4:53	6,624	16%
Game Console	2:58	8:49	12,110	30%
Internet Connected Device	5:04	9:04	20,090	49%

TEENS 12-17	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	18:15	18:42	21,234	85%
Live+Time-Shifted TV	9:55	10:47	19,447	78%
Time-Shifted TV	1:10	2:38	9,575	38%
TV-Connected Devices	8:20	12:20	15,113	60%
DVD/Blu-ray Device	0:31	3:54	2,847	11%
Game Console	4:29	12:00	8,481	34%
Internet Connected Device	3:19	7:22	9,942	40%
Radio	6:22	7:24	21,668	87%

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	Reddit, YouTube, and other sites with active public forums and comments 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 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 Q3 2018 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) 07/02/2018 – 09/30/2018 via Nielsen NPOWER/National Panel; Radio 09/14/2017 – 09/12/2018 via RADAR 139; 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 – 07/02/18, 07/09/18, 07/16/18, 07/23/18, 08/06/18, 08/13/18, 08/20/18, 09/03/18, 09/10/18, 09/17/18, 09/24/18. Digital data was produced on 01/07/19 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.

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

THE AUDIO UNIVERSE

Radio is based on Nielsen RADAR and the National Regional Database. Streaming audio on smartphone and tablet are based on Nielsen's Total Media Fusion. Podcasts are based on Nielsen's Podcast Fusion Data. Satellite Radio is based on Nielsen Scarborough USA+ release 02/2018.

TELEVISION DISTRIBUTION STATUS, DEVICE OWNERSHIP

Based on scaled installed counts for September 15, 2018 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 Q3 2018 data.

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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