

nielsen
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AN UNCOMMON SENSE
OF THE CONSUMER™



LOCAL WATCH

**WHERE YOU LIVE AND ITS
IMPACT ON YOUR CHOICES**

AUGUST 2014

LOCAL MAKES ALL THE DIFFERENCE

WHERE WE LIVE IMPACTS HOW WE WATCH

Amid a changing landscape of media consumption and consumer habits, the unique nature of local markets stands out as a major differentiator. The choices we make each day about what to watch and what to buy are greatly influenced by our immediate surroundings, our communities, towns and cities.

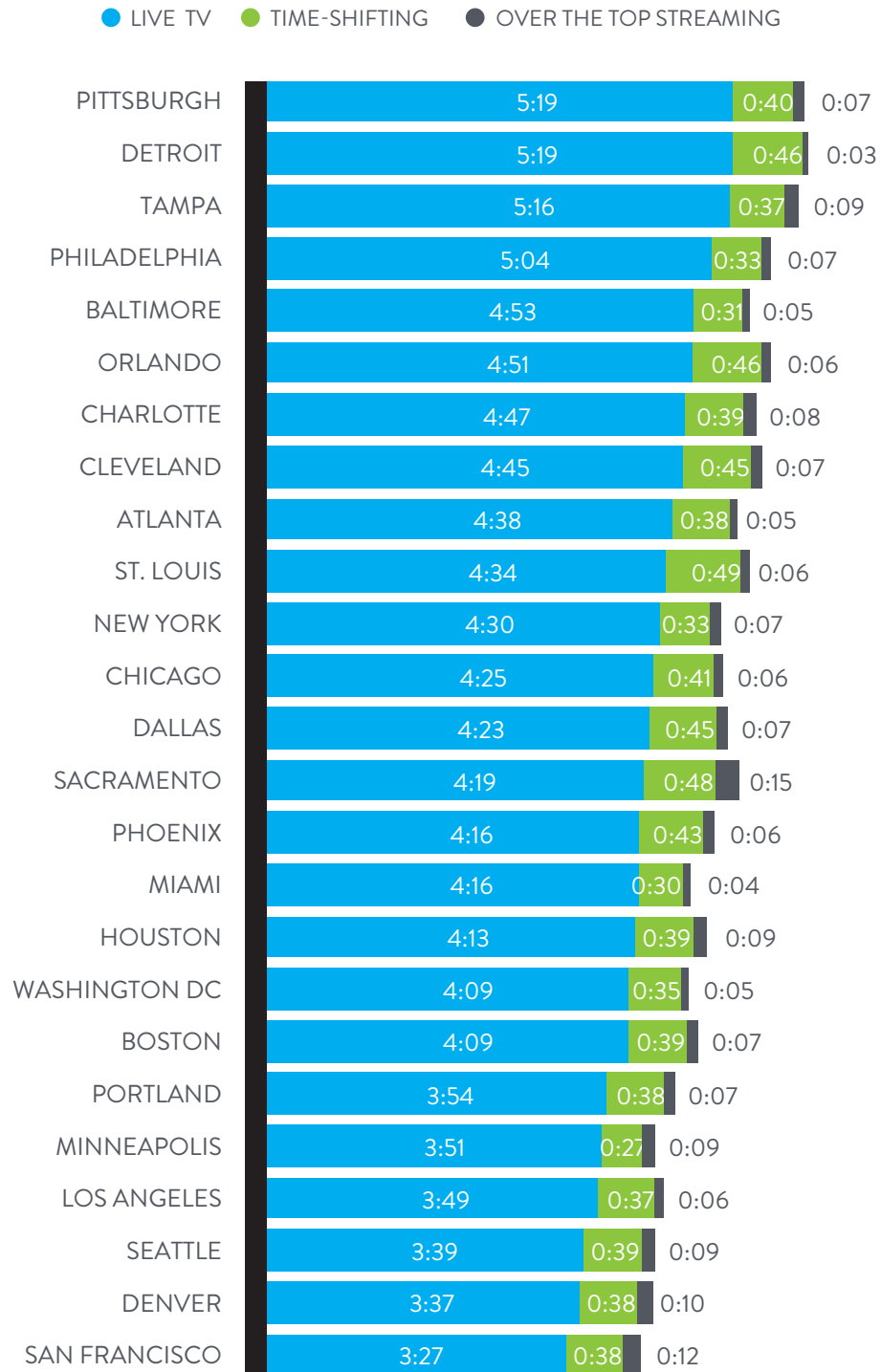
Today there is more content than ever before being offered on more and more devices and across platforms; smartphones are now nearly ubiquitous, tablet penetration is approaching 50 percent, smart TVs are gaining traction and the concept of time-shifting is no longer the sole domain of the in-home DVR. Across the country, live television continues to dominate viewing, and from the local news we watch to how we watch it, your community has a unique fingerprint.

This quarter we turn our attention to two local markets with distinctive characteristics apart from their geography: San Francisco and Cincinnati.

As Americans take in the last few weeks of summer fun and entertainment and begin to ponder what issues are most important to them in the upcoming mid-term elections, we profile the unique insights that our spotlight local markets deliver for marketers and broadcasters looking to tailor their messages in just the right way.

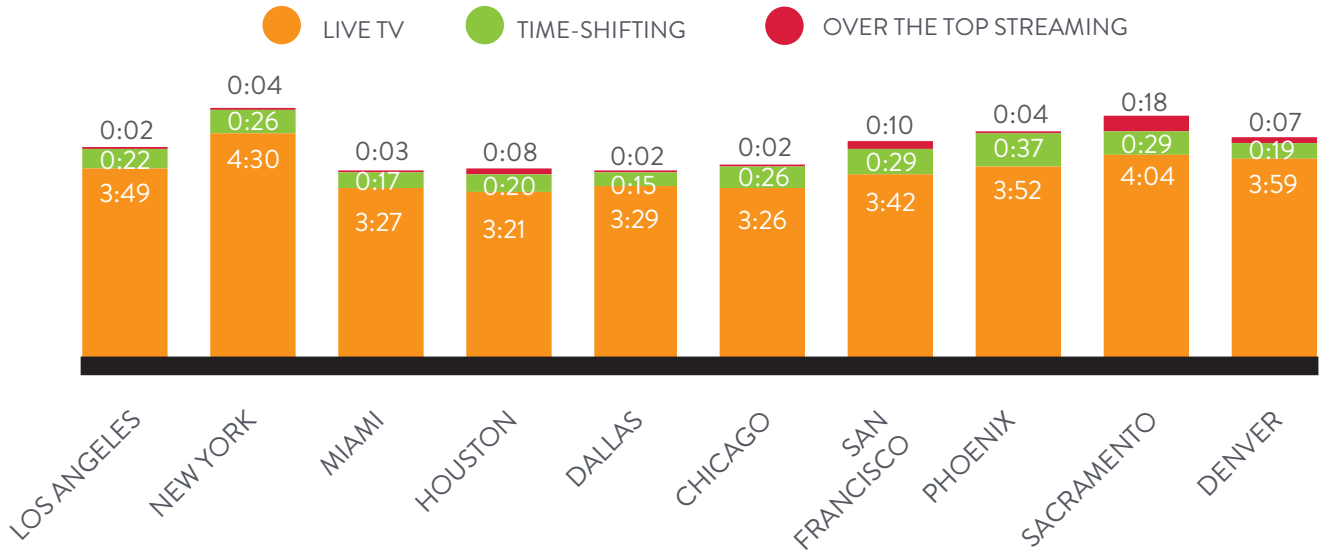
AVERAGE TIME SPENT PER DAY (HH:MM)

WHILE VIEWING IS INCREASINGLY FRAGMENTED, LIVE TV STILL MAKES UP THE BULK OF HOW WE WATCH

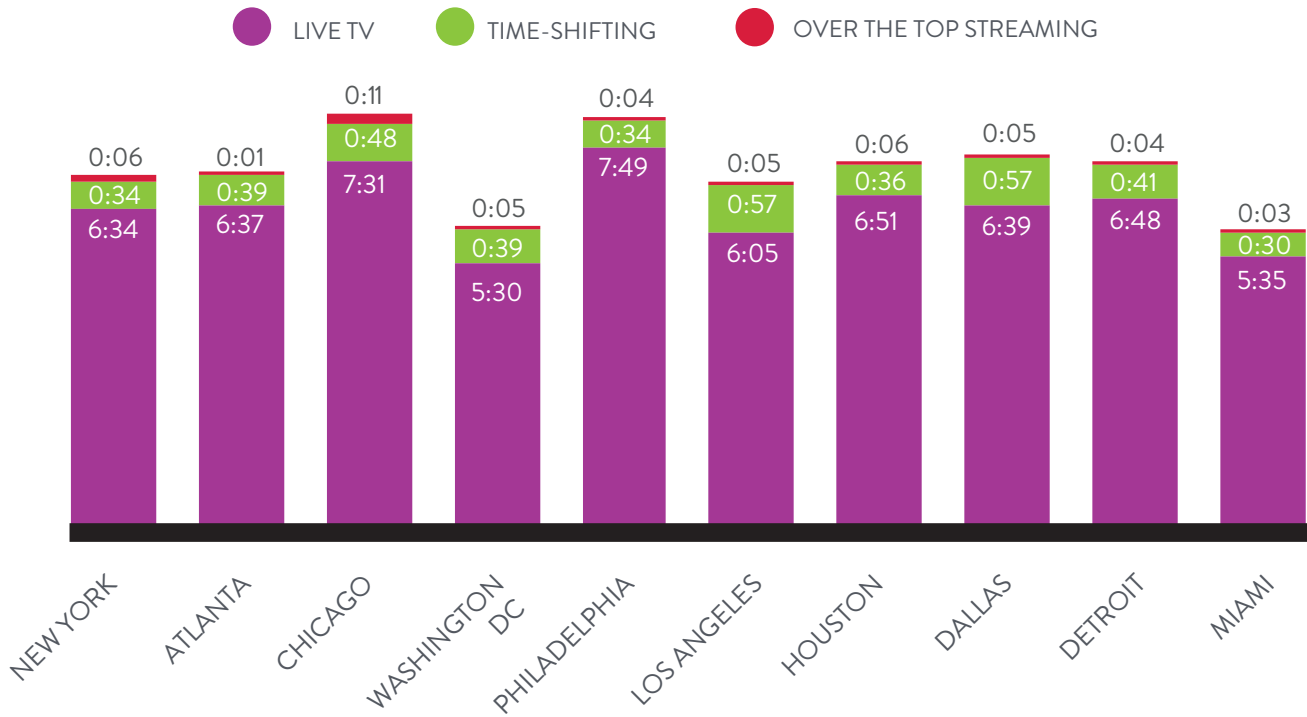


Source: Local Custom Toolbox, MAY2014, Persons 25-54, Time Spent Average Daily HH:MM, Live PUT, XPLT & OTT among all LPM markets

AVERAGE TIME SPENT BY HISPANICS PER DAY (HH:MM)



AVERAGE TIME SPENT BY AFRICAN AMERICANS PER DAY (HH:MM)



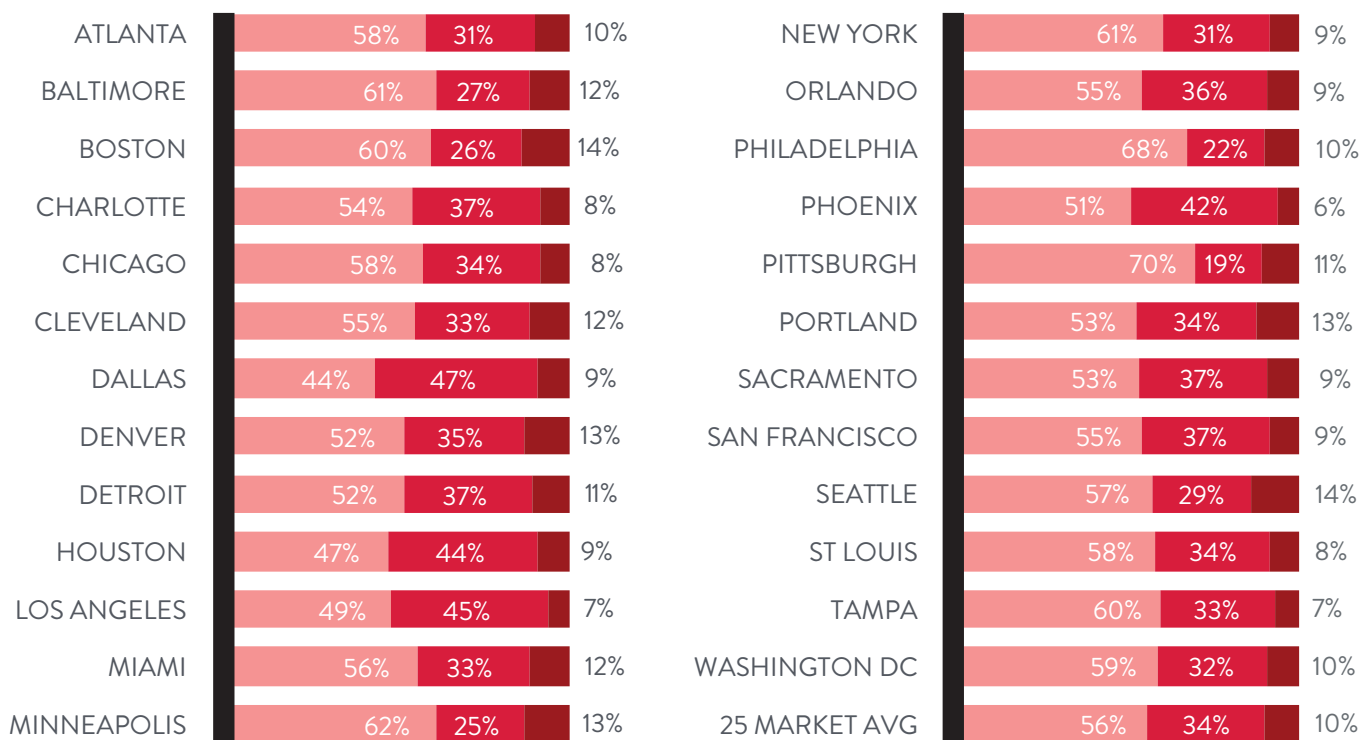
Source: Local Custom Toolbox, MAY2014, Persons 25-54, Time Spent Average Daily HH:MM, Live PUT, XPLT & OTT among top LPM markets

TIME-SHIFTING IN PRIMETIME

As consumers become more aware of their on-demand options and media companies and distributors make more content available, time-shifting and video-on-demand content becomes more common.

TIME-SHIFTING AND VOD IN PRIMETIME

● LIVE VIEWING ● TIME-SHIFTED VIEWING WITHIN 7 DAYS ● VIDEO ON DEMAND (VOD)

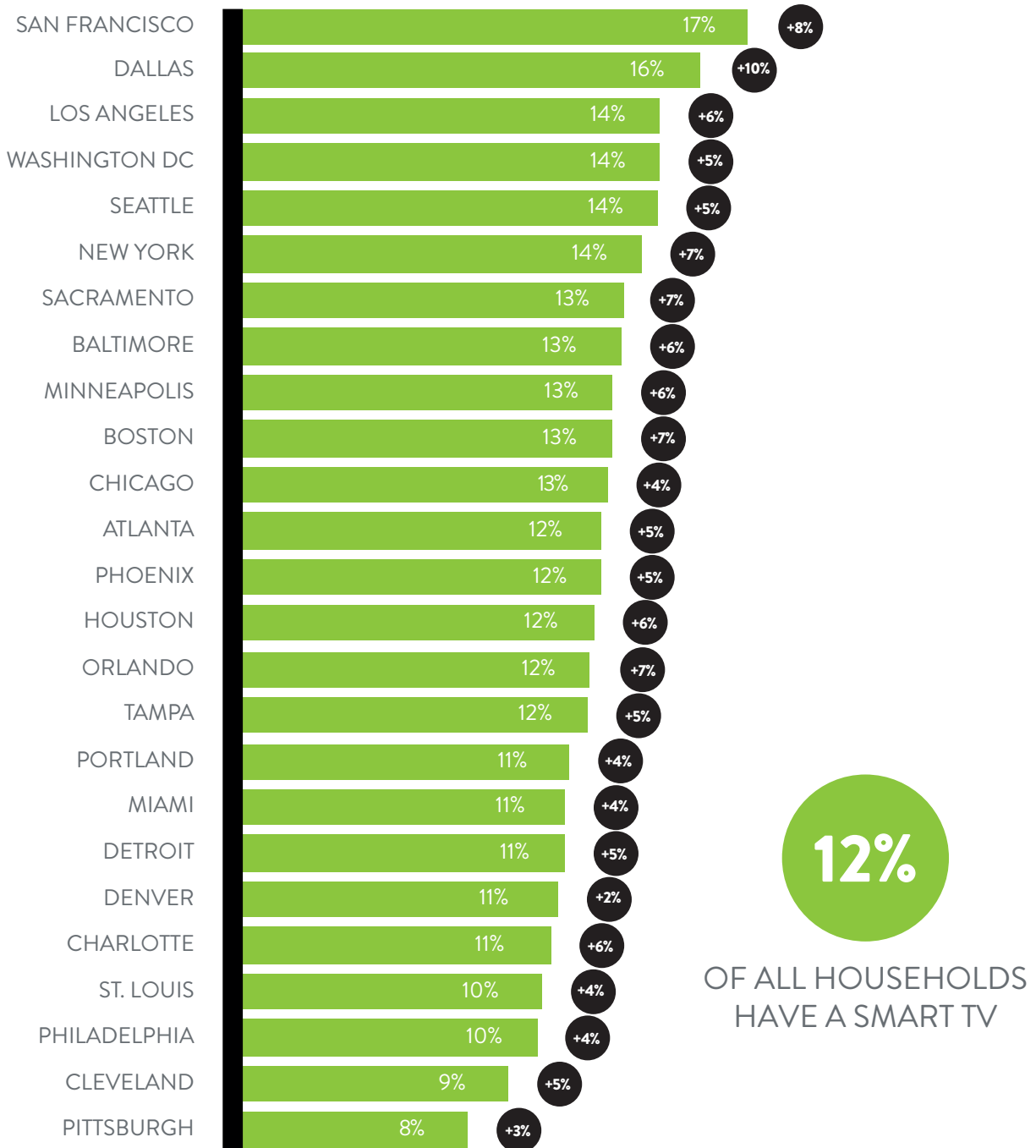


Source: Nielsen NPOWER, June 2014, Based on the ratings for primetime telecasts with recently telecast VOD contribution among externally reportable networks, includes only programming encoded for measurement, Live+7, P18+ in LPM markets

STREAMING CONTENT VIA YOUR TELEVISION

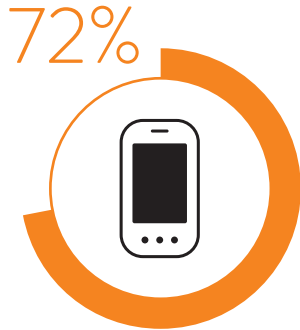
AS SMART TV PENETRATION INCREASES, MORE AND MORE HOUSEHOLDS HAVE ACCESS TO STREAMING CONTENT DIRECTLY THROUGH THEIR SET.

● SMART TV OWNERSHIP ● DIFFERENCE YOY IN PERCENTAGE POINTS



Source: Nielsen Custom Data, SmartTV Capable and Enabled HHs based on installed counts, May 2014

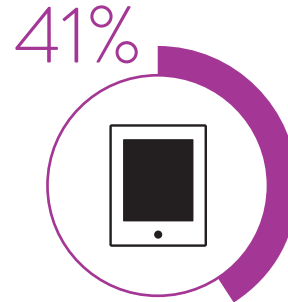
SMARTPHONE AND TABLET PENETRATION BY LPM MARKET



OWN A SMARTPHONE

- 82%** ORLANDO
- 78%** DALLAS
- 78%** MIAMI
- 78%** HOUSTON
- 78%** SAN FRANCISCO
- 78%** WASHINGTON DC
- 78%** SACRAMENTO
- 78%** DENVER
- 77%** PHOENIX
- 76%** ATLANTA
- 76%** LOS ANGELES
- 74%** BALTIMORE
- 74%** TAMPA
- 74%** CHICAGO
- 73%** PORTLAND
- 72%** ST. LOUIS
- 72%** CHARLOTTE
- 72%** NEW YORK
- 72%** PHILADELPHIA
- 71%** MINNEAPOLIS
- 71%** BOSTON
- 69%** SEATTLE
- 68%** DETROIT
- 61%** PITTSBURGH
- 61%** CLEVELAND

Source: Mobile Insights, Persons 13+, MAY2014



OWN A TABLET

- 56%** WASHINGTON DC
- 53%** SAN FRANCISCO
- 53%** ATLANTA
- 52%** BOSTON
- 48%** CHICAGO
- 47%** NEW YORK
- 47%** PORTLAND
- 46%** DETROIT
- 45%** BALTIMORE
- 45%** ORLANDO
- 44%** DENVER
- 44%** SACRAMENTO
- 42%** LOS ANGELES
- 42%** PHILADELPHIA
- 41%** MINNEAPOLIS
- 41%** CLEVELAND
- 41%** SEATTLE
- 41%** TAMPA
- 39%** HOUSTON
- 38%** DALLAS
- 37%** PITTSBURGH
- 36%** PHOENIX
- 35%** CHARLOTTE
- 34%** MIAMI
- 33%** ST. LOUIS

Source: NPOWER, HHs, Tablets 1+, MAY2014 sweep measurement

SMARTPHONE & TABLET PENETRATION AMONG HISPANICS



SMARTPHONE

79%	TOTAL US
87%	NEW YORK
86%	PHOENIX
85%	DENVER
82%	CHICAGO
82%	SAN FRANCISCO
82%	SACRAMENTO
81%	DALLAS
79%	HOUSTON
77%	MIAMI
74%	LOS ANGELES



TABLET

42%	TOTAL US
55%	CHICAGO
52%	NEW YORK
50%	SAN FRANCISCO
46%	SACRAMENTO
41%	MIAMI
40%	HOUSTON
37%	LOS ANGELES
35%	DENVER
35%	DALLAS
30%	PHOENIX

SMARTPHONE & TABLET PENETRATION AMONG AFRICAN AMERICANS



SMARTPHONE

77%	TOTAL US
92%	MIAMI
82%	DETROIT
81%	WASHINGTON DC
77%	LOS ANGELES
75%	ATLANTA
75%	HOUSTON
75%	CHICAGO
74%	NEW YORK
72%	DALLAS
60%	PHILADELPHIA



TABLET

42%	TOTAL US
61%	WASHINGTON DC
54%	ATLANTA
51%	DETROIT
50%	NEW YORK
49%	CHICAGO
40%	PHILADELPHIA
38%	MIAMI
38%	LOS ANGELES
32%	HOUSTON
31%	DALLAS



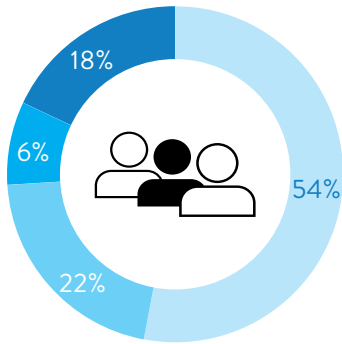
LOCATION, LOCATION, LOCATION

Painting the entire country with the same brush doesn't work during an election year, nor does it apply when considering how consumers spend their time and money during summer leisure season. Savvy broadcasters and marketers know that a tailored approach that is sensitive to the unique factors of each local market will generate the best results. To illustrate this concept, we have chosen San Francisco, CA and Cincinnati, OH to compare and contrast. A brief profile of demographics, media trends, entertainment, vacation and voting behavior will underscore how no two markets are alike.

LOCAL MARKET PROFILE

SAN FRANCISCO, CA

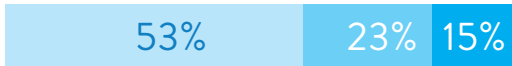
DMA RANK #6 - 2,518,900 HHS



● WHITE ● HISPANIC
● AFRICAN AMERICAN ● ASIAN OR OTHER

\$95,070

AVERAGE HH INCOME



● HS GRAD ● COLLEGE GRAD ● POST GRAD



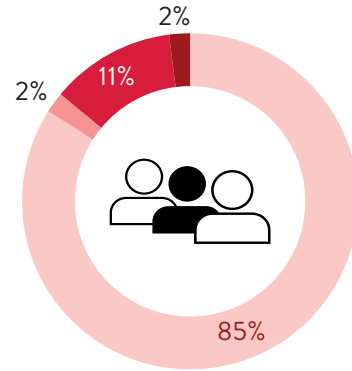
● NOT EMPLOYED ● BLUE COLLAR
● WHITE COLLAR

HH SIZE		PRESENCE OF KIDS	
12%	1 PERSON	16%	AGE 5 AND UNDER
29%	2 PERSON	17%	AGE 6-11
20%	3 PERSON	18%	AGE 12-17
20%	4 PERSON		
19%	5+ PERSON		

Source: San Francisco Scarborough R 1 2014 (Feb 2013 - Jan 2014)

CINCINNATI, OH

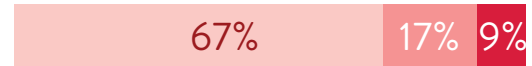
DMA RANK #35 - 908,440 HHS



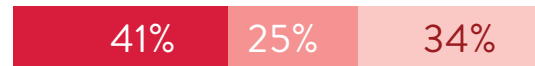
● WHITE ● HISPANIC
● AFRICAN AMERICAN ● ASIAN OR OTHER

\$66,530

AVERAGE HH INCOME



● HS GRAD ● COLLEGE GRAD ● POST GRAD



● NOT EMPLOYED ● BLUE COLLAR
● WHITE COLLAR

HH SIZE		PRESENCE OF KIDS	
14%	1 PERSON	16%	AGE 5 AND UNDER
33%	2 PERSON	17%	AGE 6-11
20%	3 PERSON	20%	AGE 12-17
18%	4 PERSON		
16%	5+ PERSON		

Source: Cincinnati Scarborough R 1 2014 (Mar 2013 - Feb 2014)

DMA Households and Rank based on 2013-2014 Nielsen Local TV Market Universe Estimates

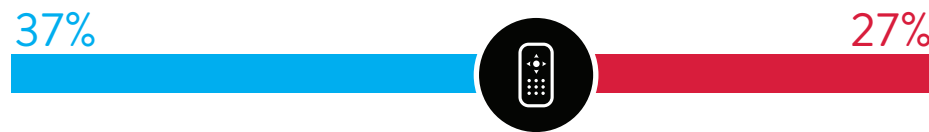
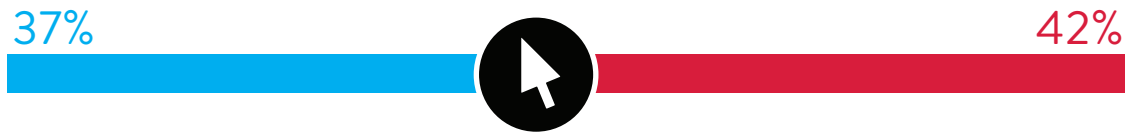
LOCAL MARKET PROFILE

SAN FRANCISCO, CA

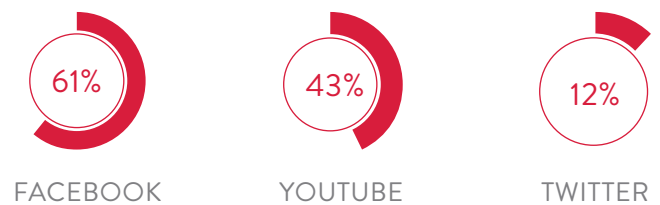
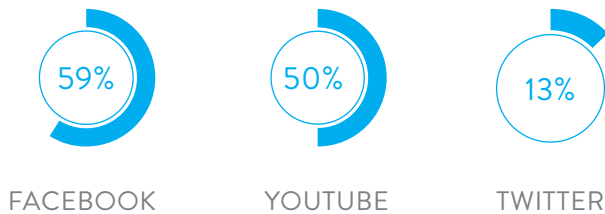
DMA RANK #6 - 2,518,900 HHS

CINCINNATI, OH

DMA RANK #35 - 908,440 HHS



INTERNET SITES VISITED/APPS USED IN THE PAST MONTH



Source: San Francisco Scarborough R 1 2014 (Aug 2013 - Jan 2014)

Source: Cincinnati Scarborough R 1 2014 (Sep 2013 - Feb 2014)

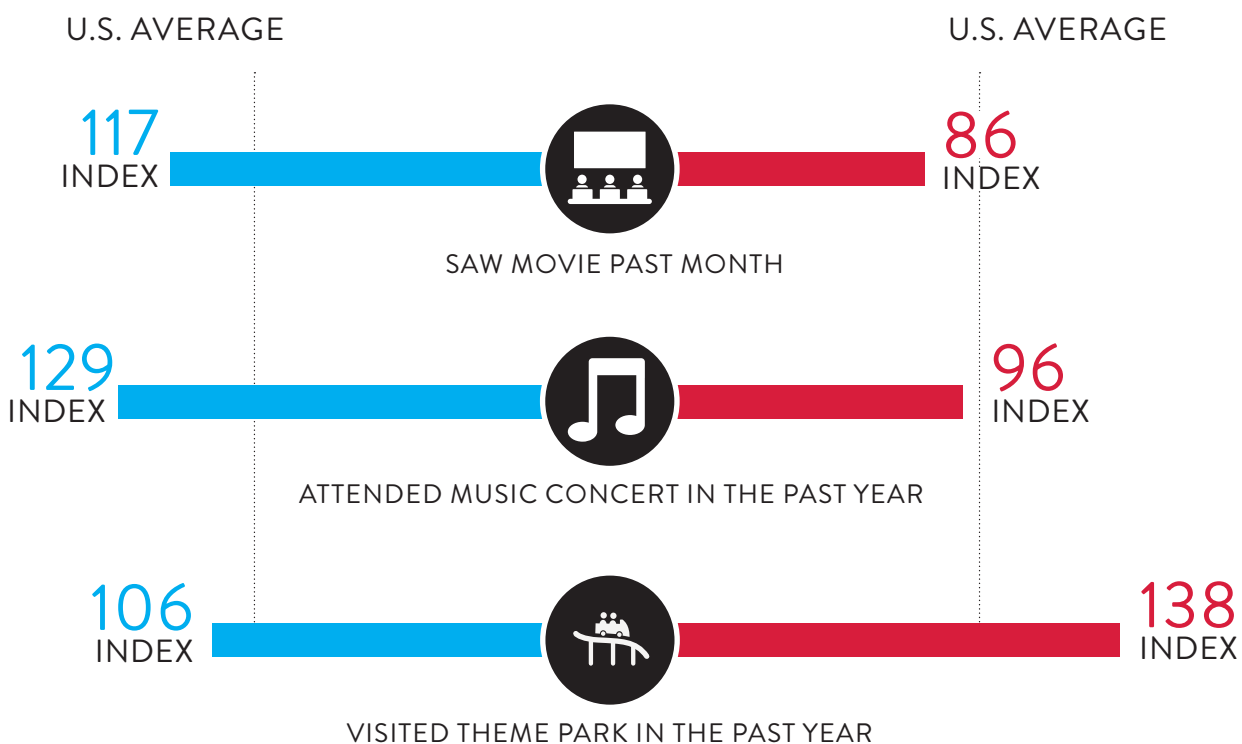
DMA Households and Rank based on 2013-2014 Nielsen Local TV Market Universe Estimates / Hours of TV Viewing based on May 2014 Live+7 Total Day for P18+

WHERE WE LIVE IMPACTS OUR ENTERTAINMENT CHOICES

MOVIES, CONCERTS & THEME PARKS

SAN FRANCISCO, CA

CINCINNATI, OH



Source: Nielsen Scarborough USA+ R 2, 2013 (Aug 2012 – Sep 2013)

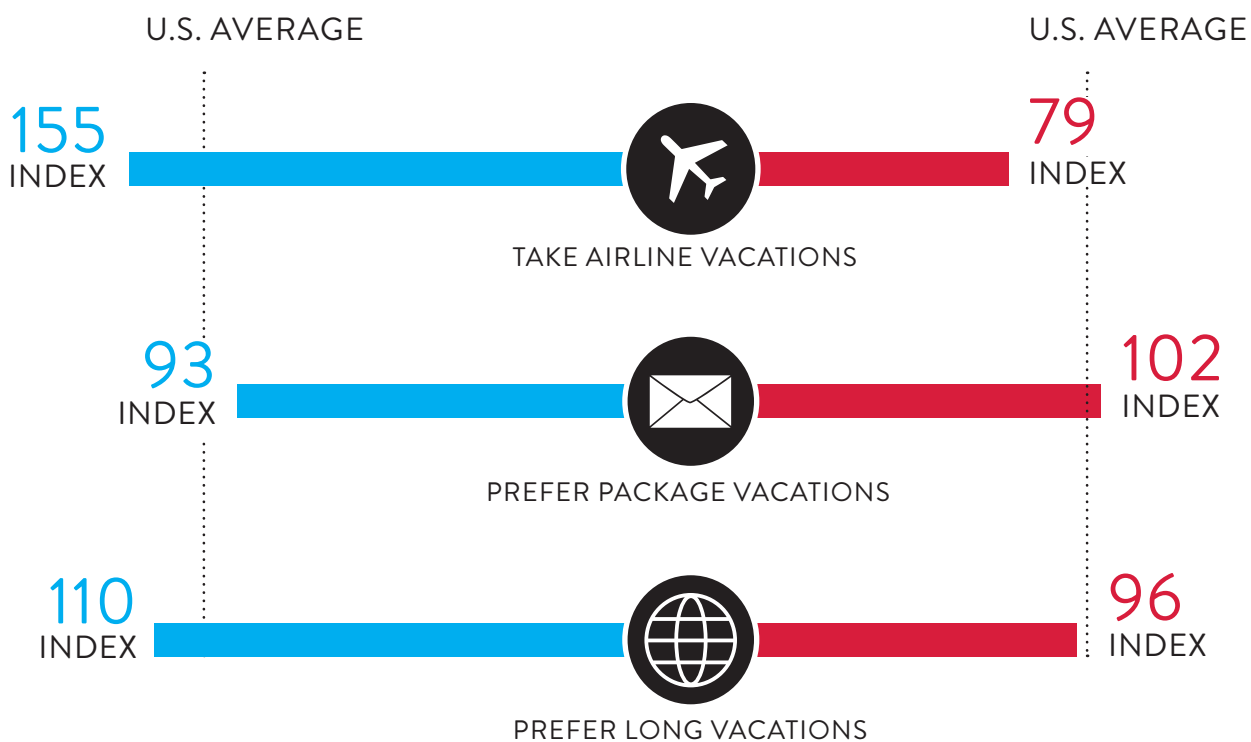
How to Read: Adults 18+ in San Francisco are 17 percent more likely to see a movie in the past month than the rest of the US

LEISURE TRAVEL OPTIONS DIFFER ACROSS THE COUNTRY

STAY OR GO: VACATION CHOICES BY MARKET

SAN FRANCISCO, CA

CINCINNATI, OH



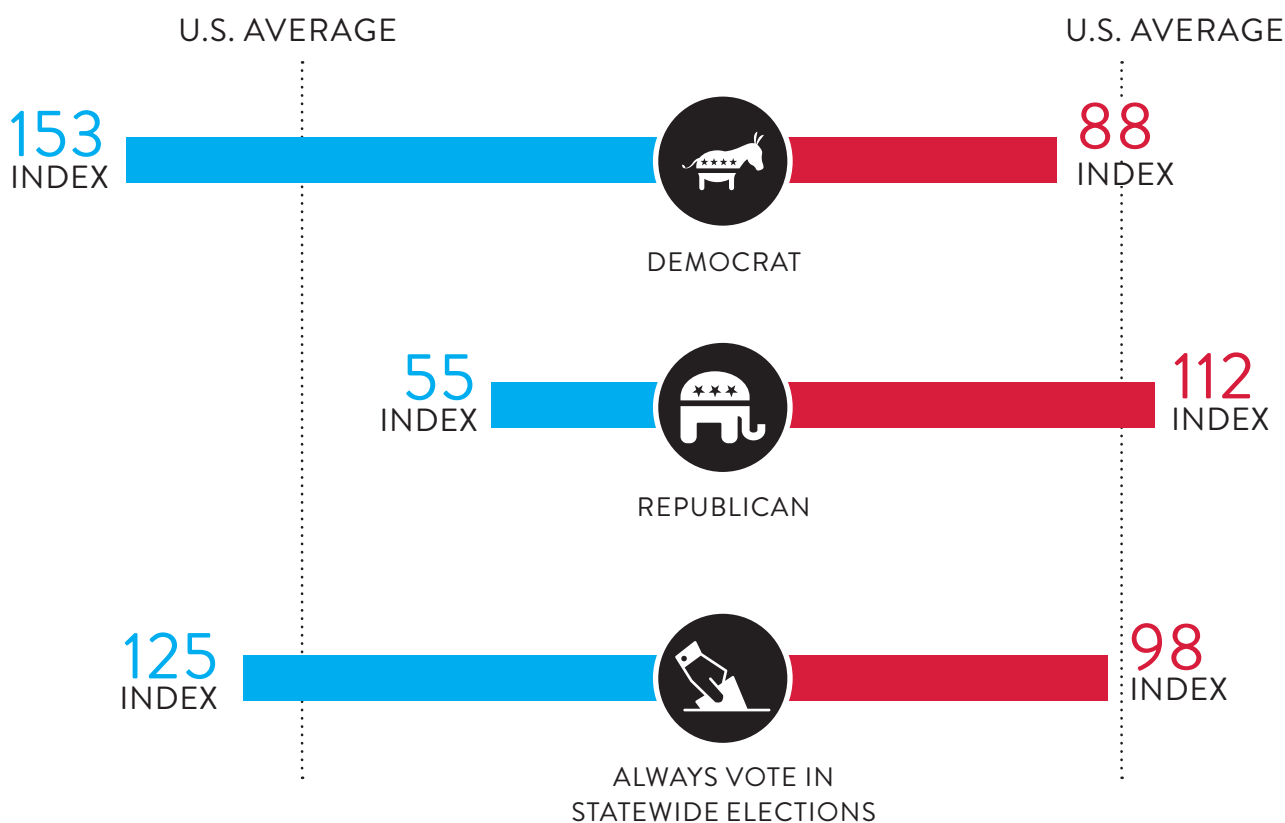
Source: Nielsen Scarborough USA+ R 2, 2013 (Aug 2012 – Sep 2013). GfK/MRI Attitudinal Insights Data
 How to Read: Adults 18+ in San Francisco are 55 percent more likely to take airline vacations than the rest of the US

LOCAL MEDIA CAN MAKE OR BREAK THE OUTCOME OF AN ELECTION

POLITICAL ENVIRONMENTS DIFFER BY MARKET

SAN FRANCISCO, CA

CINCINNATI, OH



Source: Nielsen Scarborough USA+ R 2, 2013 (Aug 2012 – Sep 2013). Party affiliation based on registered voters
 How to Read: Adults 18+ in San Francisco are 53 percent more likely to identify as Democrats than the rest of the US

COMMUNITY MINDSET HAS A BIG INFLUENCE ON POLITICAL ATTITUDES

POLITICAL ISSUES DIFFER BY MARKET

SAN FRANCISCO, CA

CINCINNATI, OH

U.S. AVERAGE

U.S. AVERAGE



"I SUPPORT POLITICIANS BASED ON ENVIRONMENTAL POSITIONS"

"BUYING AMERICAN PRODUCTS IS IMPORTANT TO ME"

"CONTRIBUTED MONEY TO A POLITICAL ORGANIZATION IN THE PAST YEAR"



Source: Nielsen Scarborough USA+ R 2, 2013 (Aug 2012 – Sep 2013). GfK/MRI Attitudinal Insights Data

How to Read: Adults 18+ in San Francisco are twice as likely to support politicians based on environmental positions than the rest of the US

SOURCING & METHODOLOGIES

GLOSSARY

TV HOUSEHOLD: Nielsen now defines a TV household as 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.

TRADITIONAL TV: Watching live or time-shifted content on a television set.

OVER-THE-TOP CONTENT (OTT): Over-the-top content describes broadband delivery of video and audio without a multiple system operator being involved in the control or distribution of the content itself.

SMART TV: A smart TV, referred to as a connected TV or hybrid TV, describes a trend of integration of the Internet and Web 2.0 features into television sets and set-top boxes.

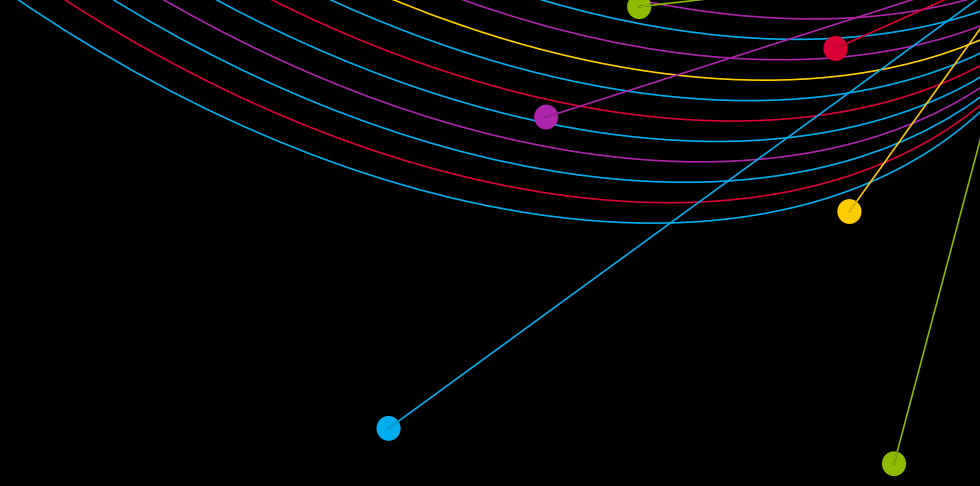
VIDEO ON DEMAND (VOD): Or audio and video on demand (AVOD) are systems which allow users to select and watch/listen to video or audio content on demand.

ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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