



Q1 2017

# THE NIELSEN LOCAL WATCH REPORT

## TELEVISION TRENDS IN OUR CITIES



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**VP, AUDIENCE INSIGHTS**

# LOCAL NEWS IS WHERE THE VIEWERS ARE

In this edition of Nielsen's Local Watch Report, the focus is on the growing trend of news consumption. News viewing increased from 2015 to 2016 and has shown continued growth in early 2017. But growth isn't the only good news here.

Perhaps the more astonishing fact is that local news on local broadcast TV stations is the place where people spend the most time consuming news on TV. By far, local news reaches more adults than both national broadcast network news and cable news. In fact, in an average week in the first quarter of 2017, local news reached 40% of persons 25-54. This compares to 32% for national broadcast news and 17% for cable news. In the same time period, adults spent two hours and 22 minutes watching local news, which is more than double the amount of time spent watching national broadcast news.

Analyzing individual markets, we found that Memphis was the top Set Meter market for time spent watching local news, at three hours and 55 minutes per person per week while Cleveland was the top Local People Meter (LPM) market at three hours and 27 minutes.

We also looked at news consumption through personal digital media. Adults reached by local news on TV surpasses the reach of people consuming news on smartphones and PCs 4 to 1.

A handwritten signature in black ink that reads "Justin Laporte".

**JUSTIN**



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## **NEWS CONSUMPTION TRENDS** ..... **4-20**

Examination of year-over-year viewing to news outlets across local markets, comparing full-year 2015, 2016 and first quarter 2017.

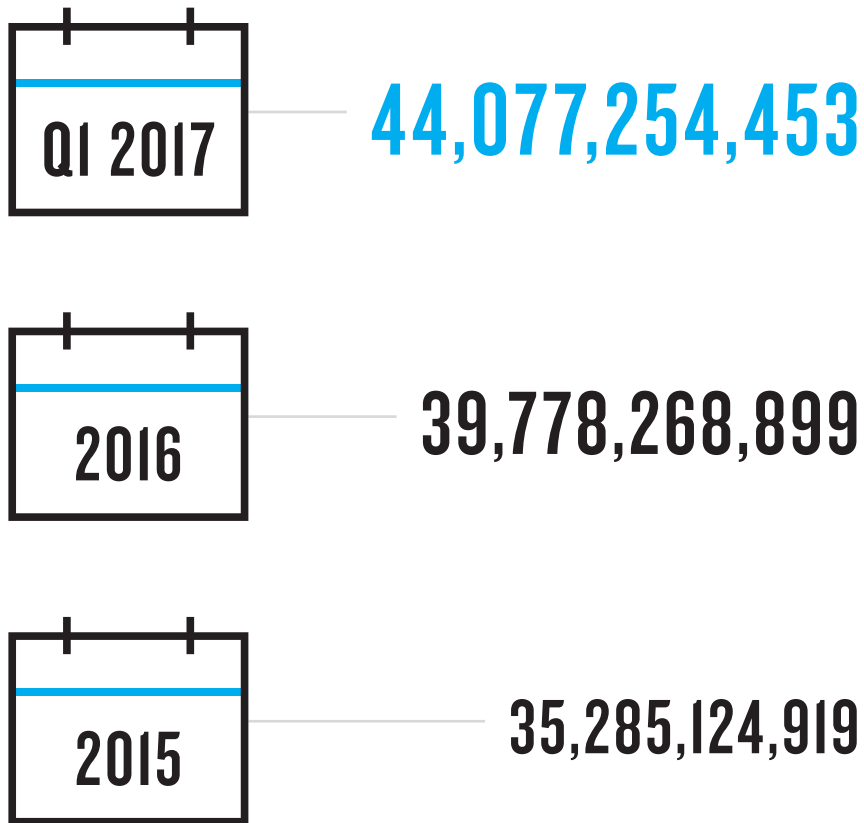
## **Q1 2017 TV & TECHNOLOGY UPDATE** ..... **21-30**

Time spent with traditional television and TV-connected devices. Technology penetration trends across metered markets.



# NEWS VIEWING IS ON THE RISE IN TOP MARKETS

WEEKLY GROSS NEWS MINUTES AMONG ADULTS IN LOCAL PEOPLE METER MARKETS



Adults in the top 25 markets are spending more than 44 billion minutes consuming news in a typical week—up 11% from full-year 2016, and 25% from full-year 2015.

Source: Nielsen Local TV View, Gross News Minutes across Cable News, Local News and National Broadcast News, P18+, based on population across Local People Meter markets. See sourcing page for additional methodology details.





# TOTAL TV NEWS CONSUMPTION BY DEMOGRAPHIC

WEEKLY TIME SPENT IN LOCAL PEOPLE METER MARKETS (HH:MM)

## PERSONS 18-34

2015	2016	Q1 2017	% CHANGE
1:09	1:13	1:14	+7.2%

## PERSONS 25-54

2015	2016	Q1 2017	% CHANGE
3:00	3:14	3:30	+16.7%

## PERSONS 35-49

2015	2016	Q1 2017	% CHANGE
3:10	3:27	3:46	+18.9%

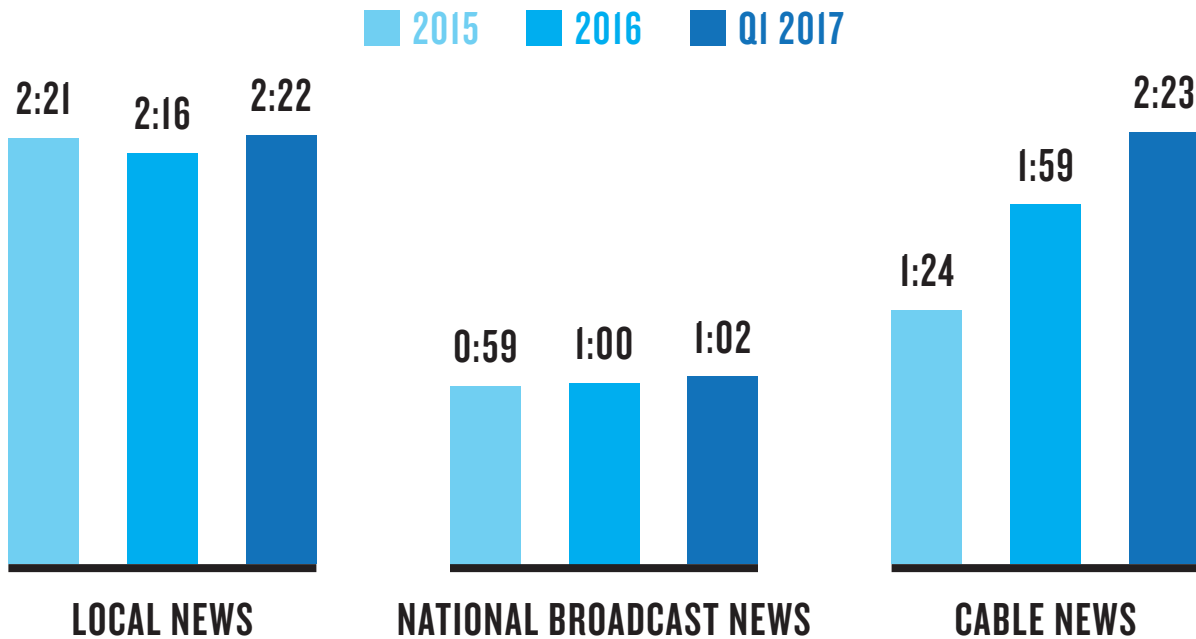
## PERSONS 50+

2015	2016	Q1 2017	% CHANGE
8:07	9:04	9:59	+23.0%

Source: Nielsen Local TV View, Average Weekly Time Spent across Cable News, Local News and National Broadcast News. Based on population across Local People Meter markets. Percent change based on Q1 2017 vs. full year 2015. See sourcing page for additional methodology details.

# LARGEST GROWTH IN NEWS VIEWING TO CABLE

WEEKLY TIME SPENT IN LOCAL PEOPLE METER MARKETS (HH:MM), ADULTS 18+

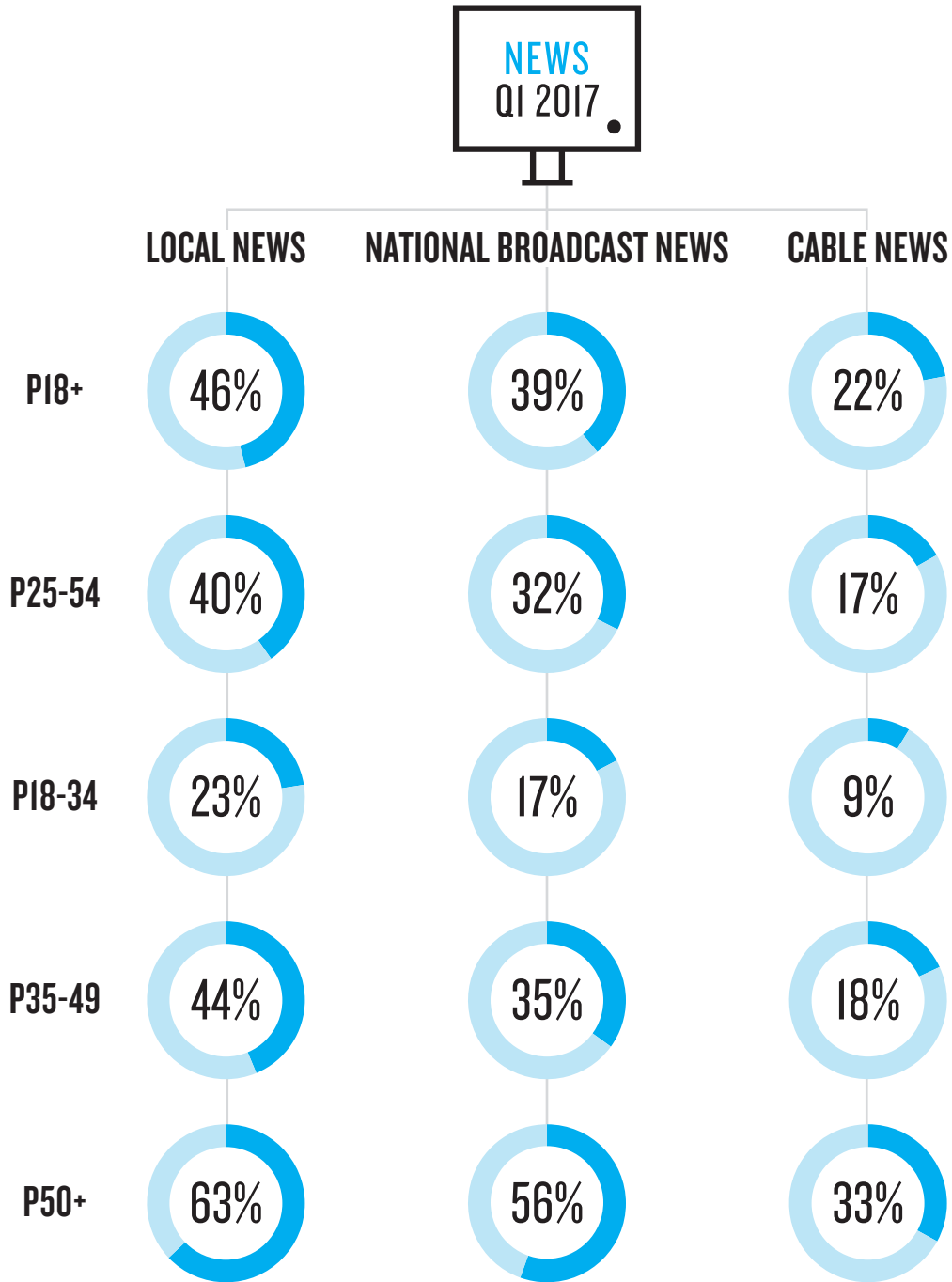


	SOURCE	AVG WEEKLY TIME SPENT (LPM POPULATION)			SHARE OF VIEWING		
		2015	2016	Q1 2017	2015	2016	Q1 2017
P18+	LOCAL NEWS	2:21	2:16	2:22	7.3%	7.2%	7.4%
	NATIONAL BROADCAST NEWS	0:59	1:00	1:02	3.1%	3.2%	3.3%
	CABLE NEWS	1:24	1:59	2:23	4.3%	6.3%	7.5%
P25-54	LOCAL NEWS	1:41	1:33	1:37	6.0%	5.8%	6.1%
	NATIONAL BROADCAST NEWS	0:37	0:39	0:39	2.2%	2.4%	2.5%
	CABLE NEWS	0:41	1:01	1:12	2.4%	3.8%	4.6%
P18-34	LOCAL NEWS	0:40	0:35	0:36	3.5%	3.4%	3.7%
	NATIONAL BROADCAST NEWS	0:14	0:14	0:14	1.2%	1.4%	1.5%
	CABLE NEWS	0:15	0:23	0:24	1.3%	2.2%	2.4%
P35-49	LOCAL NEWS	1:48	1:40	1:46	6.2%	6.0%	6.3%
	NATIONAL BROADCAST NEWS	0:40	0:41	0:42	2.3%	2.5%	2.5%
	CABLE NEWS	0:41	1:05	1:18	2.4%	3.9%	4.7%
P50+	LOCAL NEWS	3:49	3:45	3:53	8.9%	8.6%	8.8%
	NATIONAL BROADCAST NEWS	1:41	1:42	1:45	3.9%	3.9%	4.0%
	CABLE NEWS	2:36	3:36	4:20	6.1%	8.3%	9.8%

Source: Nielsen Local TV View, Time Spent based on population across Local People Meter markets.  
 Share of Viewing = Total minutes watching news divided by total minutes watching TV  
 See sourcing page for additional methodology details.

# WEEKLY REACH BY NEWS GROUP

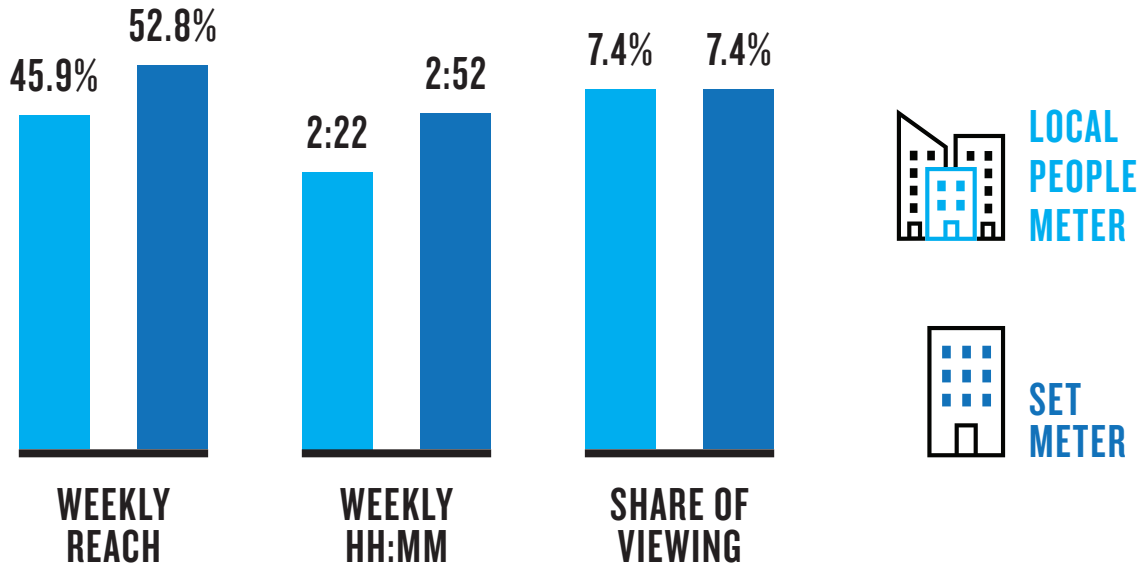
In LPM markets, local news reaches more adults than national broadcast news or cable news



Source: NLTV Reach Report, P18+, average weekly reach based on LPM Population, Q1 2017 (January 1 – March 31, 2017)  
See sourcing page for additional methodology details.

# LOCAL NEWS CONSUMPTION BY MARKET TYPE

MARKET GROUP COMPARISON, Q1 2017, ADULTS 18+



WEEKLY REACH	P18+	P25-54	P18-34	P35-49	P50+
Local People Meter	45.9%	40.3%	22.5%	43.7%	62.9%
Set Meter	52.8%	45.8%	29.6%	49.7%	69.8%
WEEKLY HH:MM	P18+	P25-54	P18-34	P35-49	P50+
Local People Meter	2:22	1:37	0:36	1:46	3:53
Set Meter	2:52	1:59	0:52	2:11	4:32
SHARE OF VIEWING	P18+	P25-54	P18-34	P35-49	P50+
Local People Meter	7.4%	6.1%	3.7%	6.3%	8.8%
Set Meter	7.4%	6.1%	4.1%	6.2%	8.7%



While local news reach and time spent are higher in set meter markets, **share of total viewing is the same in both market types**

Source: Nielsen Local TV View, See sourcing page for methodology details.

Share of Viewing = Total minutes watching news divided by total minutes watching TV

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# TOP CITIES FOR LOCAL NEWS

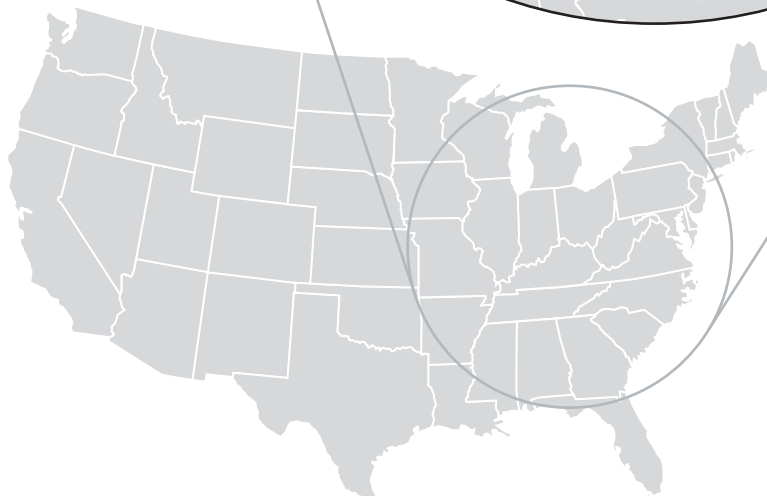
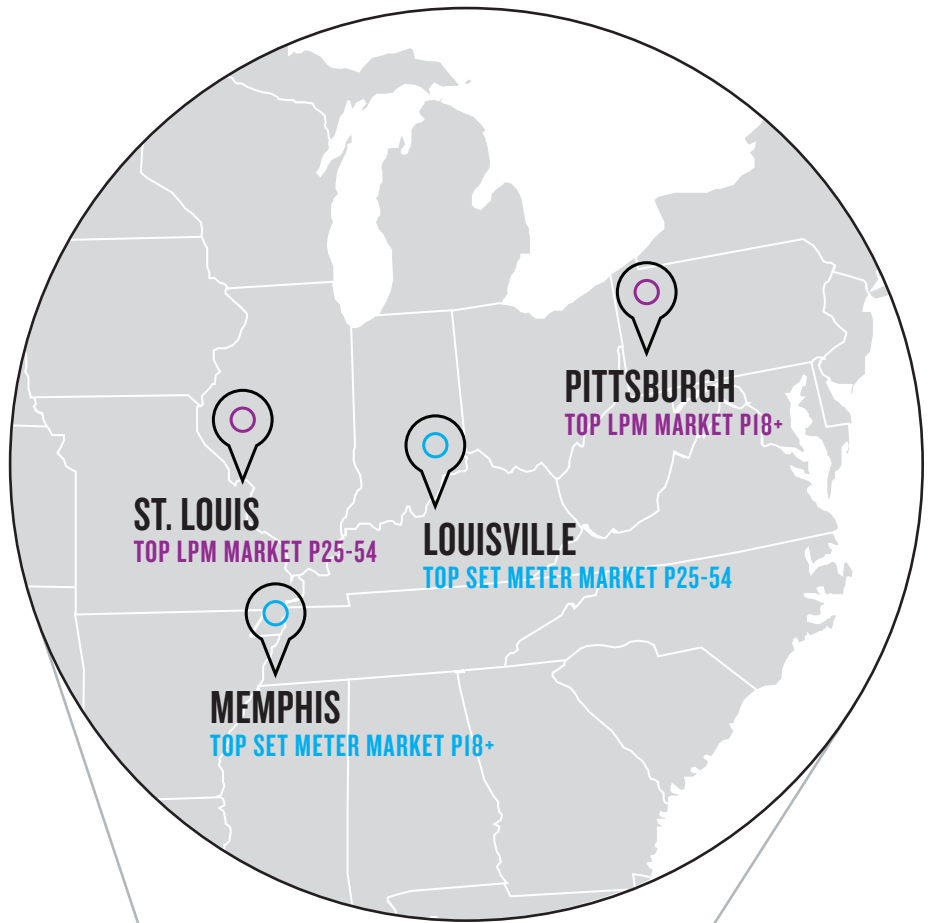
AVERAGE WEEKLY REACH % (Q1 2017)

## TOP 5 LPM MARKETS P18+

<b>PITTSBURGH</b>	<b>55.9%</b>
ST. LOUIS	54.7%
CLEVELAND	52.5%
MINNEAPOLIS	52.1%
CHICAGO	50.0%

## TOP 5 SET METER MARKETS P18+

<b>MEMPHIS</b>	<b>59.4%</b>
LOUISVILLE	57.9%
TULSA	57.7%
NASHVILLE	57.2%
KANSAS CITY	56.6%



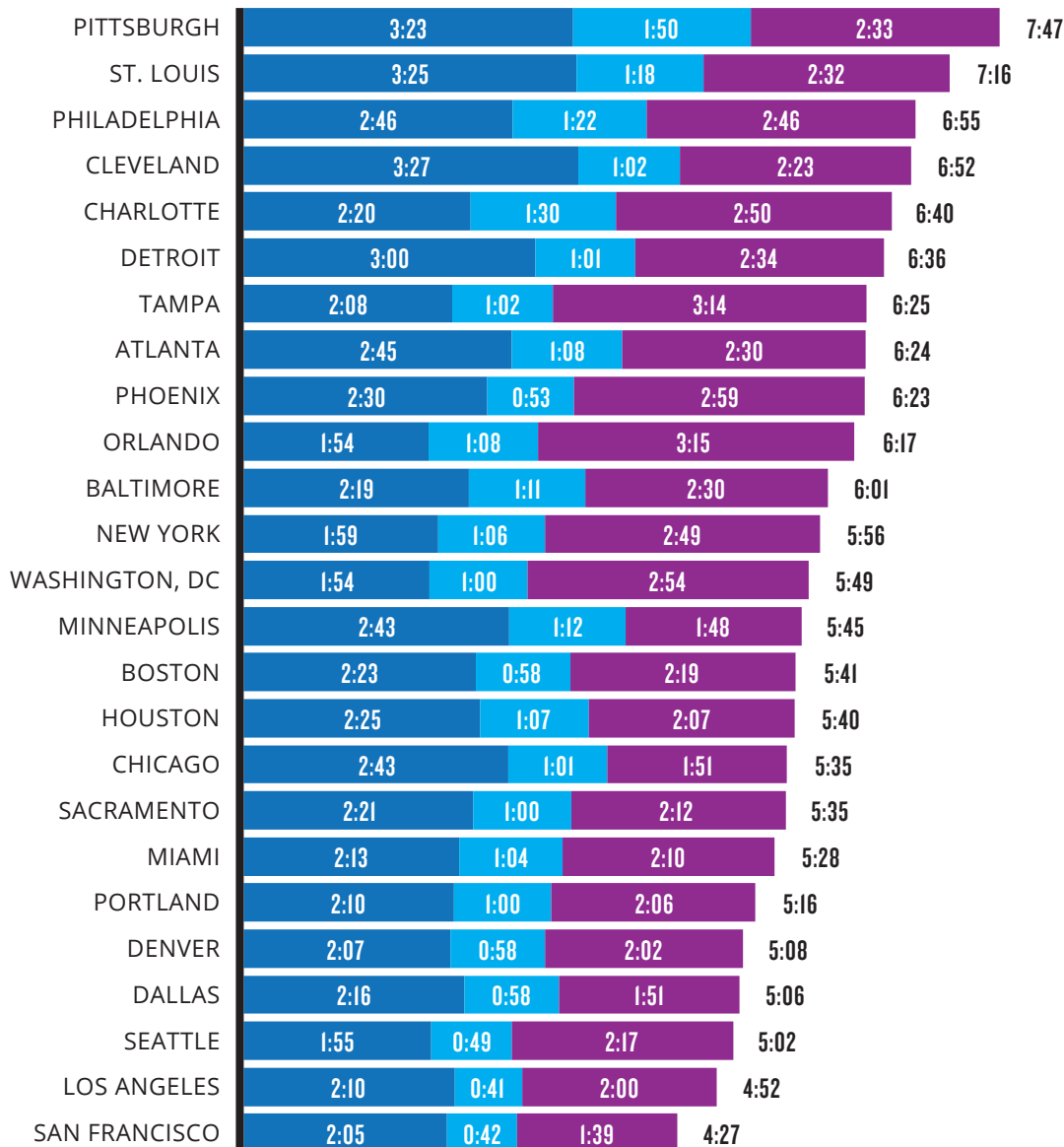
Source: Nielsen Local TV View, Local News Genre Report, Q1 2017 (January 1 - March 31, 2017); Average weekly time spent based on population  
See sourcing page for methodology details



# WEEKLY TIME SPENT IN LPM MARKETS

AVERAGE WEEKLY TIME SPENT (HH:MM) WATCHING NEWS PER ADULT 18+

LOCAL NEWS NATIONAL BROADCAST NEWS CABLE NEWS

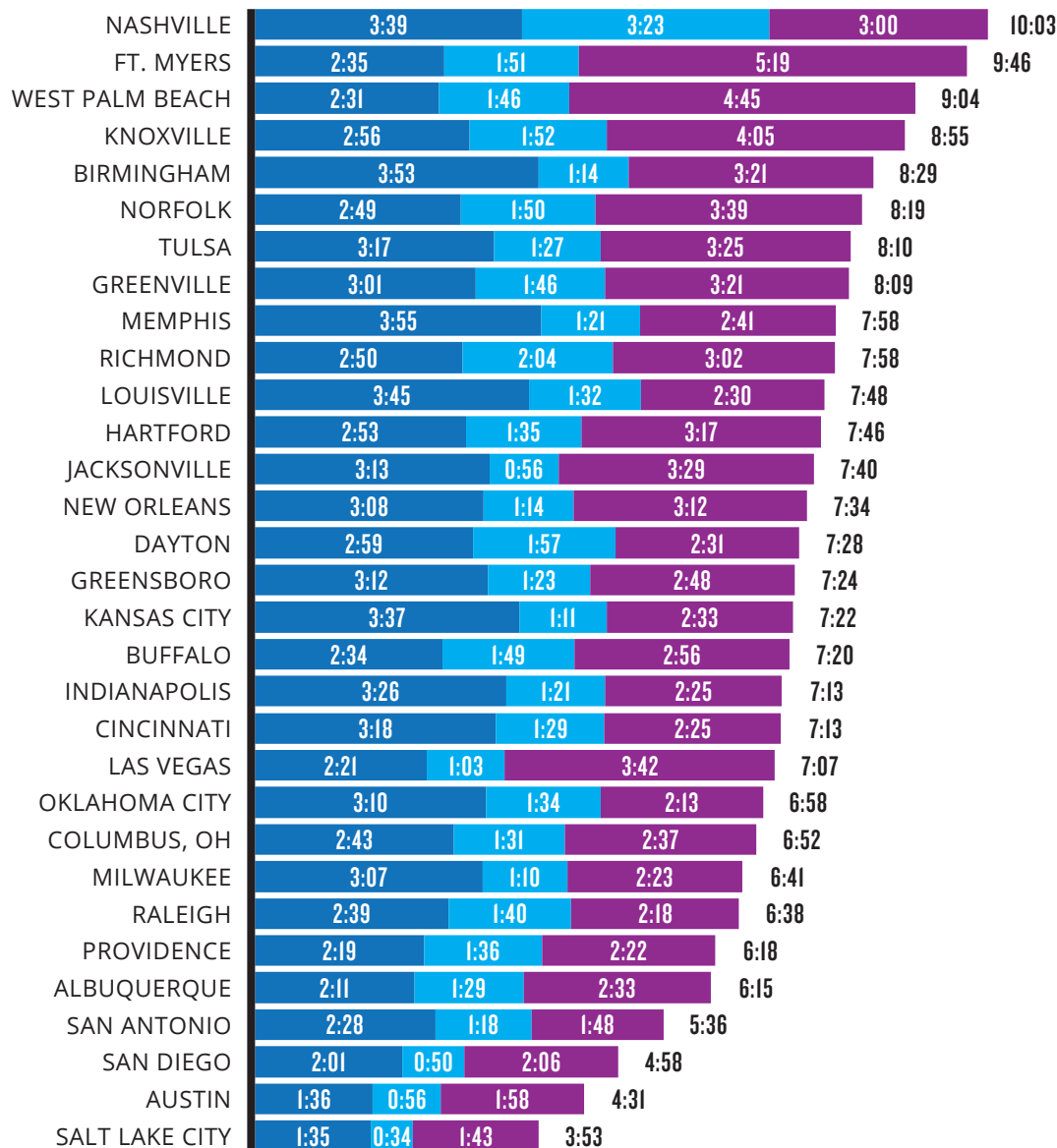


Source: Nielsen Local TV View, Q1 2017 (January 1 - March 31, 2017), P18+. Based on total population in each market. See sourcing page for additional methodology details.

# WEEKLY TIME SPENT IN SET METER MARKETS

AVERAGE WEEKLY TIME SPENT (HH:MM) WATCHING NEWS PER ADULT 18+

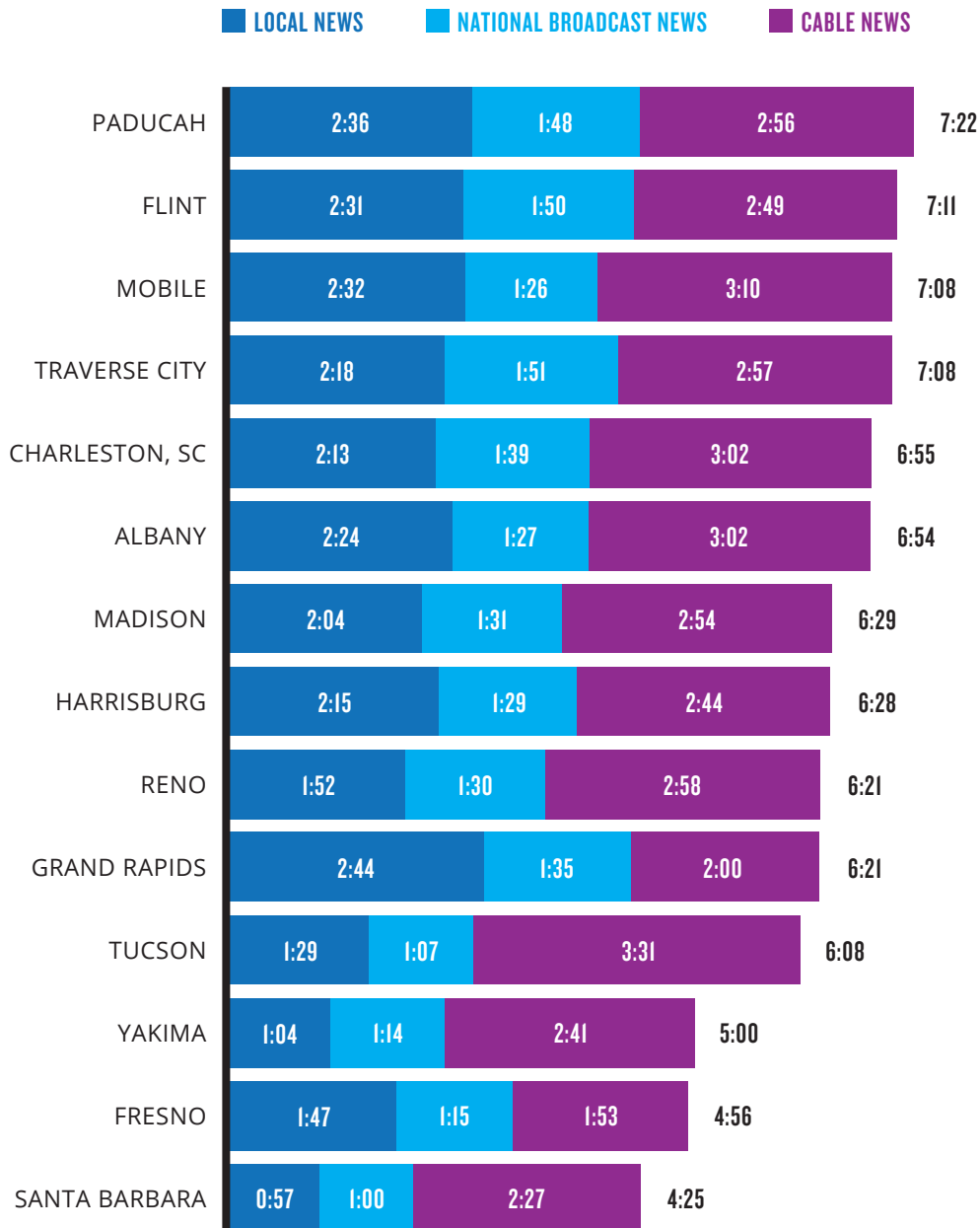
LOCAL NEWS NATIONAL BROADCAST NEWS CABLE NEWS



Source: Nielsen Local TV View, Q1 2017 (January 1 - March 31, 2017), P18+. Based on total population in each market. See sourcing page for additional methodology details.

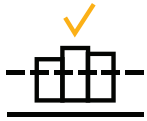
# WEEKLY TIME SPENT IN CODE READER MARKETS

AVERAGE WEEKLY TIME SPENT (HH:MM) WATCHING NEWS PER ADULT 18+

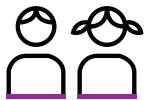


Source: Nielsen Local TV View, Q1 2017 (January 1 - March 31, 2017), P18+. Based on total population in each market. See sourcing page for additional methodology details.

# AUDIENCE PROFILE VARIES BY NEWS SOURCE



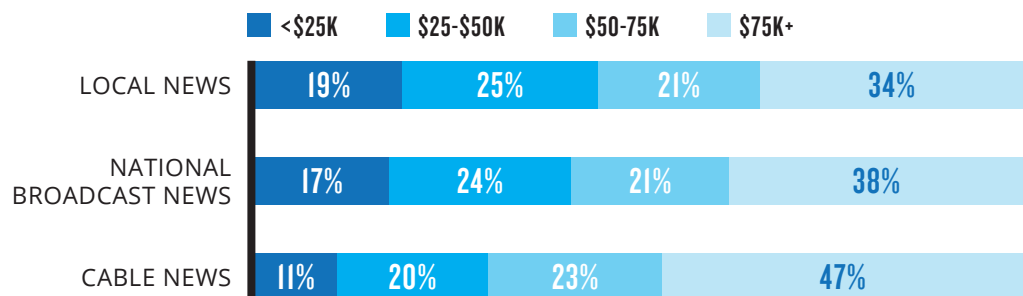
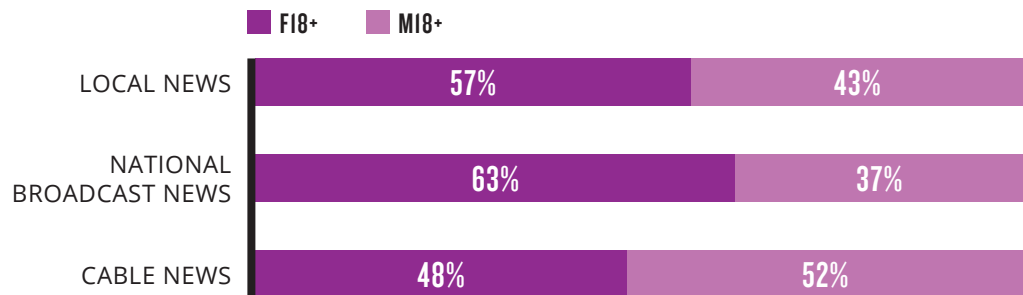
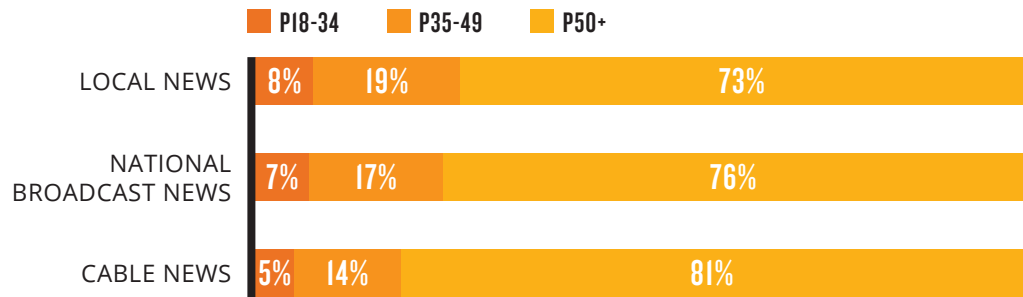
Local news composition skews younger than cable and national broadcast news



National broadcast viewers are more likely to be female, whereas cable viewers skew male



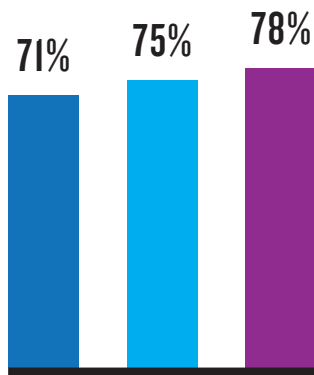
Cable news viewers have higher incomes than other news groups



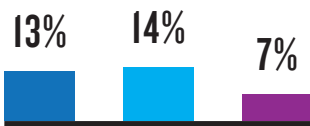
Source: Nielsen Local TV View, Q1 2017 (January 1 - March 31, 2017), P18+. Based on gross minutes across LPM markets. See sourcing page for additional methodology details.

# LOCAL NEWS VIEWERS ARE DIVERSE

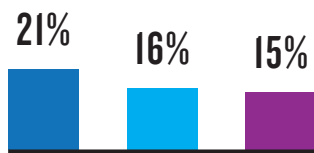
## COMPOSITION BY RACE/ETHNICITY



WHITE



HISPANIC



BLACK



ASIAN



WEEKLY TIME SPENT (HH:MM)\*



SHARE OF TOTAL VIEWING

BLACK	7:17	17%
WHITE	6:12	19%
HISPANIC	2:57	13%
ASIAN	2:25	18%

African-Americans spend the most time consuming news, at 7:17; however, news viewing makes up the largest share for white adults, at 19% of all viewing minutes.

Source: Nielsen Local TV View, Q1 2017 (January 1 - March 31, 2017), P18+. Based on P18+ gross minutes across LPM markets.

Percentages may not add to 100%. Read as: 71% of P18+ local news minutes are attributed to White viewers

\*Average weekly time spent viewing news (cable news, local news and national broadcast news) per adult 18+ in Q1 2017.

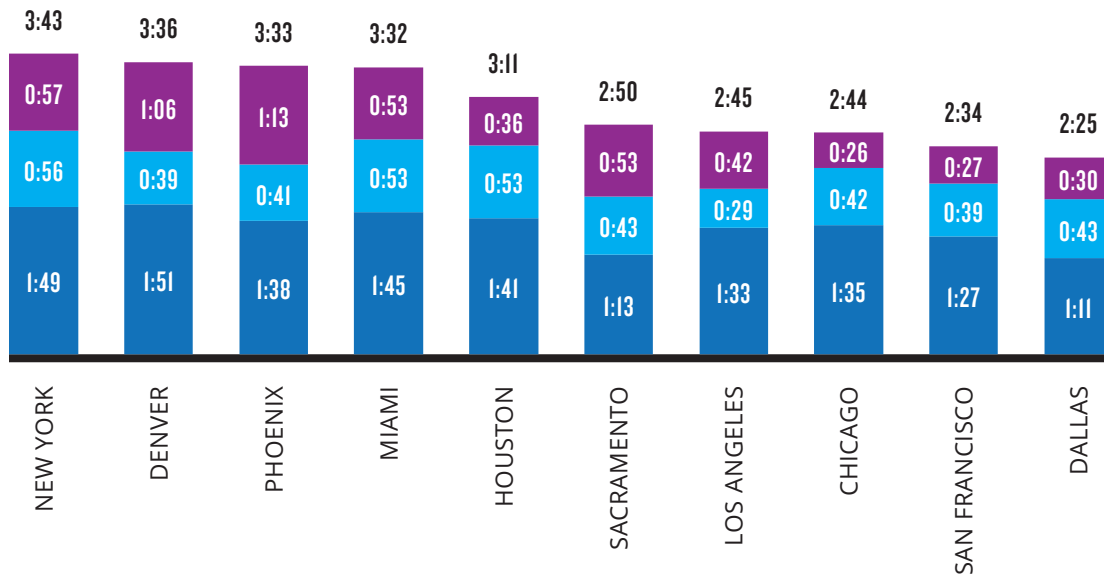




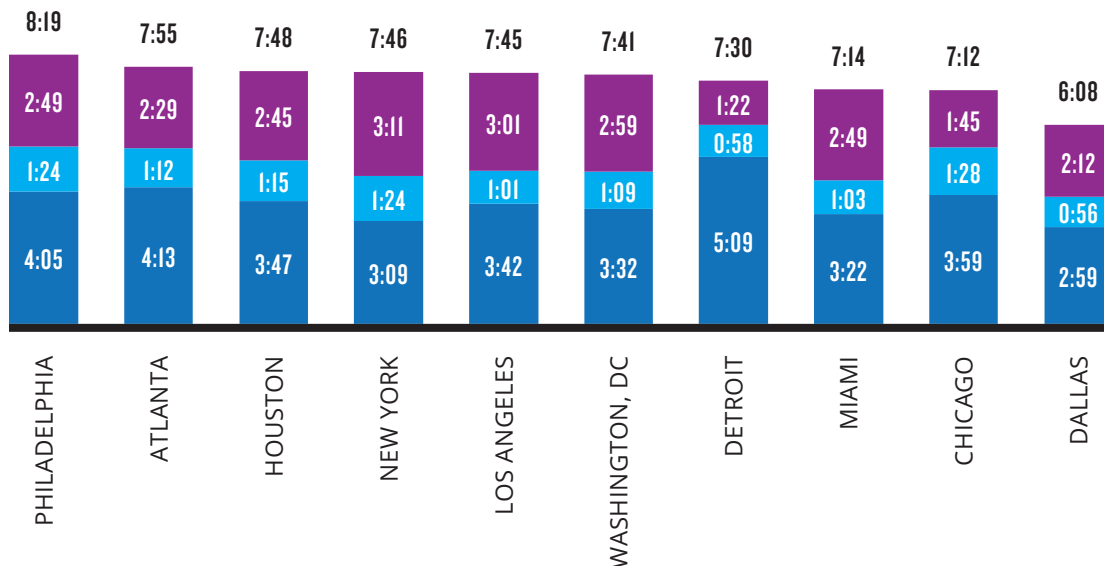
# WEEKLY TIME SPENT IN TOP LPM MARKETS BY RACE/ETHNICITY

■ LOCAL NEWS    
 ■ NATIONAL BROADCAST NEWS    
 ■ CABLE NEWS

## HISPANIC



## AFRICAN-AMERICAN

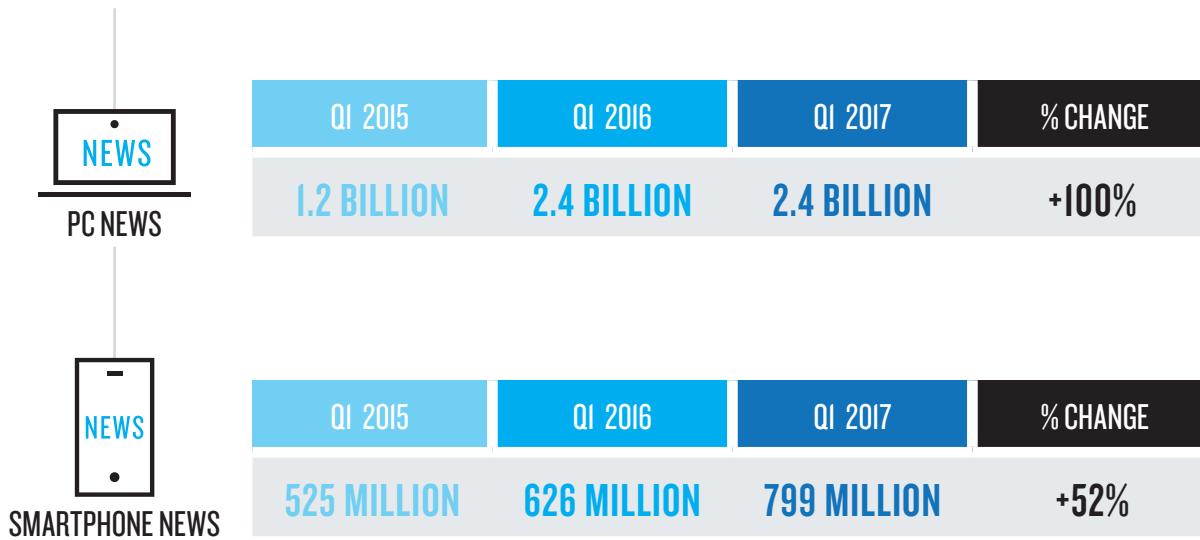


Source: Nielsen Local TV View, Q1 2017 (January 1 - March 31, 2017), P18+. Based on total population in each market. See sourcing page for additional methodology details.

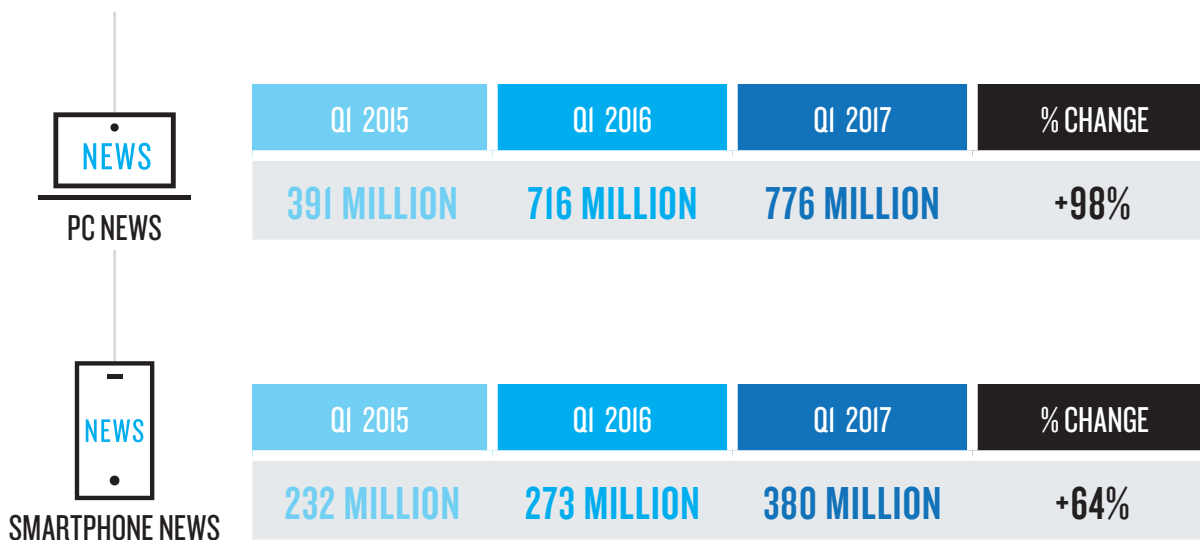
# DIGITAL NEWS SHOWS GROWTH, TOO

AVERAGE WEEKLY GROSS MINUTES AMONG ADULTS 18+

## LOCAL PEOPLE METER MARKETS



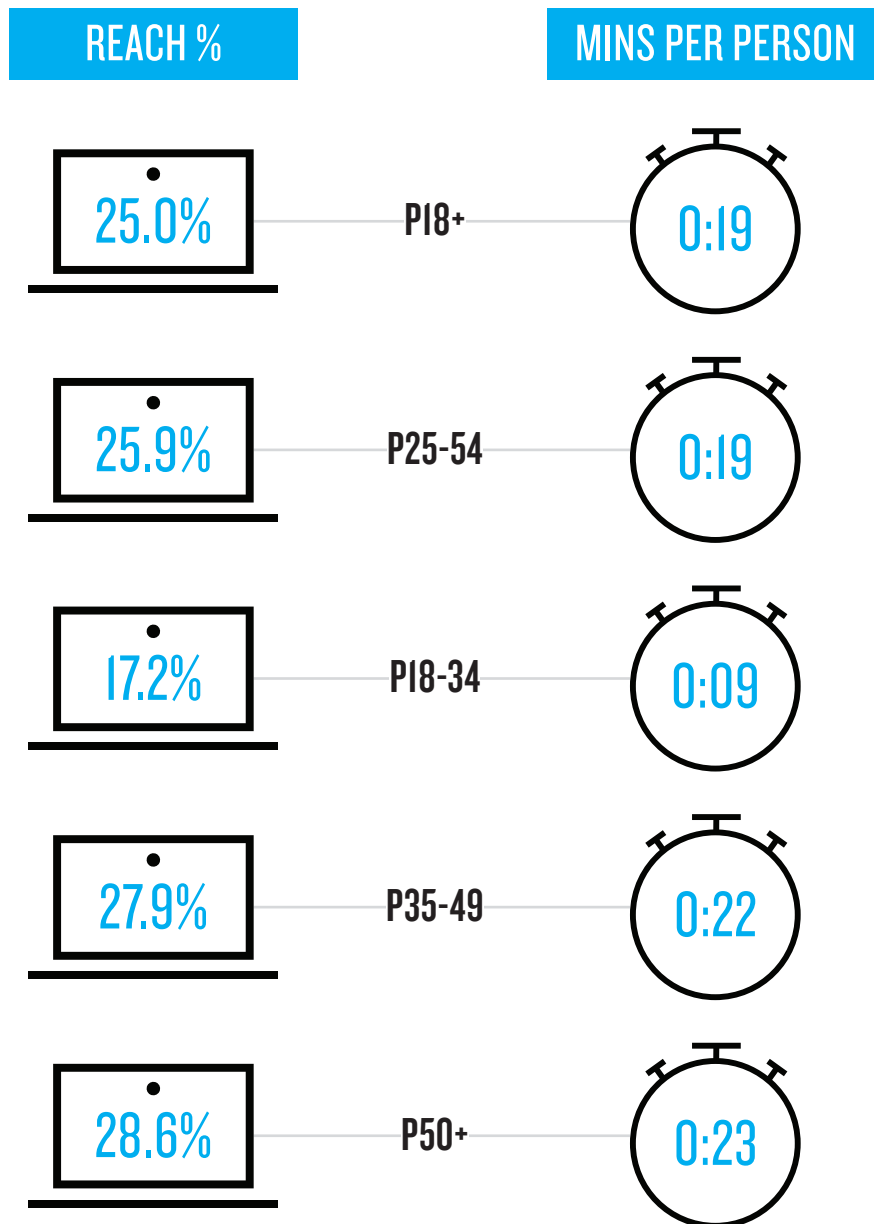
## SET METER MARKETS



Source: Nielsen Netview (Computer News), Electronic Mobile Measurement (Smartphone News).  
 Percent change based on Q1 2017 vs. Q1 2015  
 See sourcing page for additional methodology details.

# WEEKLY REACH AND TIME SPENT WITH NEWS ON A COMPUTER

COMPUTER NEWS IN LOCAL PEOPLE METER MARKETS (Q1 2017)

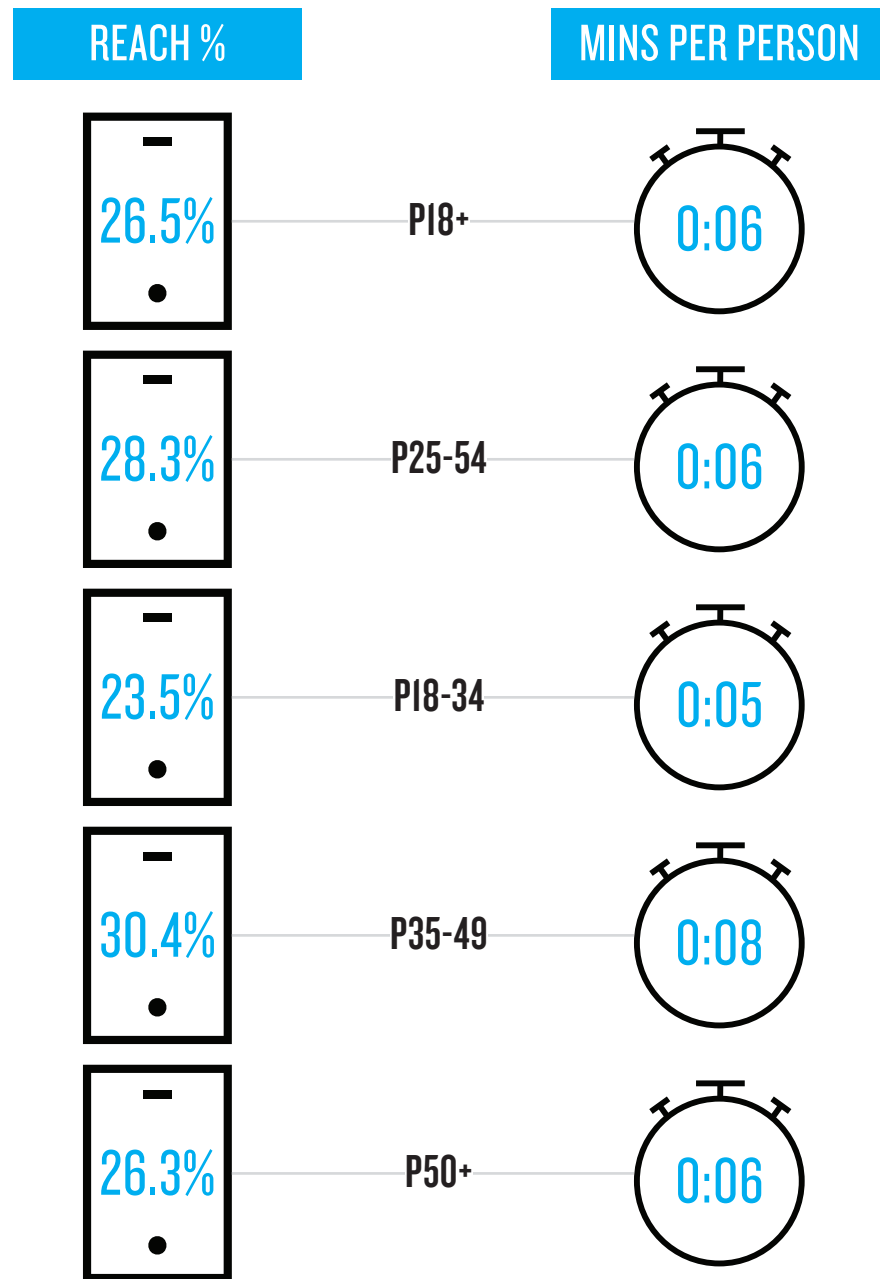


Among adults, time spent with PC news makes up approximately 5% of all news consumption across TV and internet sources

Source: Nielsen Netview, Q1 2017, based on total population in LPM markets. See sourcing page for methodology details.

# WEEKLY REACH AND TIME SPENT WITH SMARTPHONE NEWS

SMARTPHONE NEWS IN LOCAL PEOPLE METER MARKETS (Q1 2017)



Persons 35-49 are reached most via smartphone and spend the most time consuming news on smartphones

Source: Nielsen Electronic Mobile Measurement, Q1 2017, based on total population in LPM markets. See sourcing page for methodology details.

# TOP MARKETS FOR ACCESSING LOCAL NEWS ON A DEVICE

RANKED BY INDEX



## ACCESS LOCAL NEWS ON A COMPUTER

- 168 SALT LAKE CITY
- 148 AUSTIN
- 145 SAN FRANCISCO / OAKLAND / SAN JOSE
- 141 SEATTLE / TACOMA
- 137 BOSTON

Adults in Salt Lake City are 68% more likely to have accessed local news on a computer in the past 30 days than the average U.S. adult.

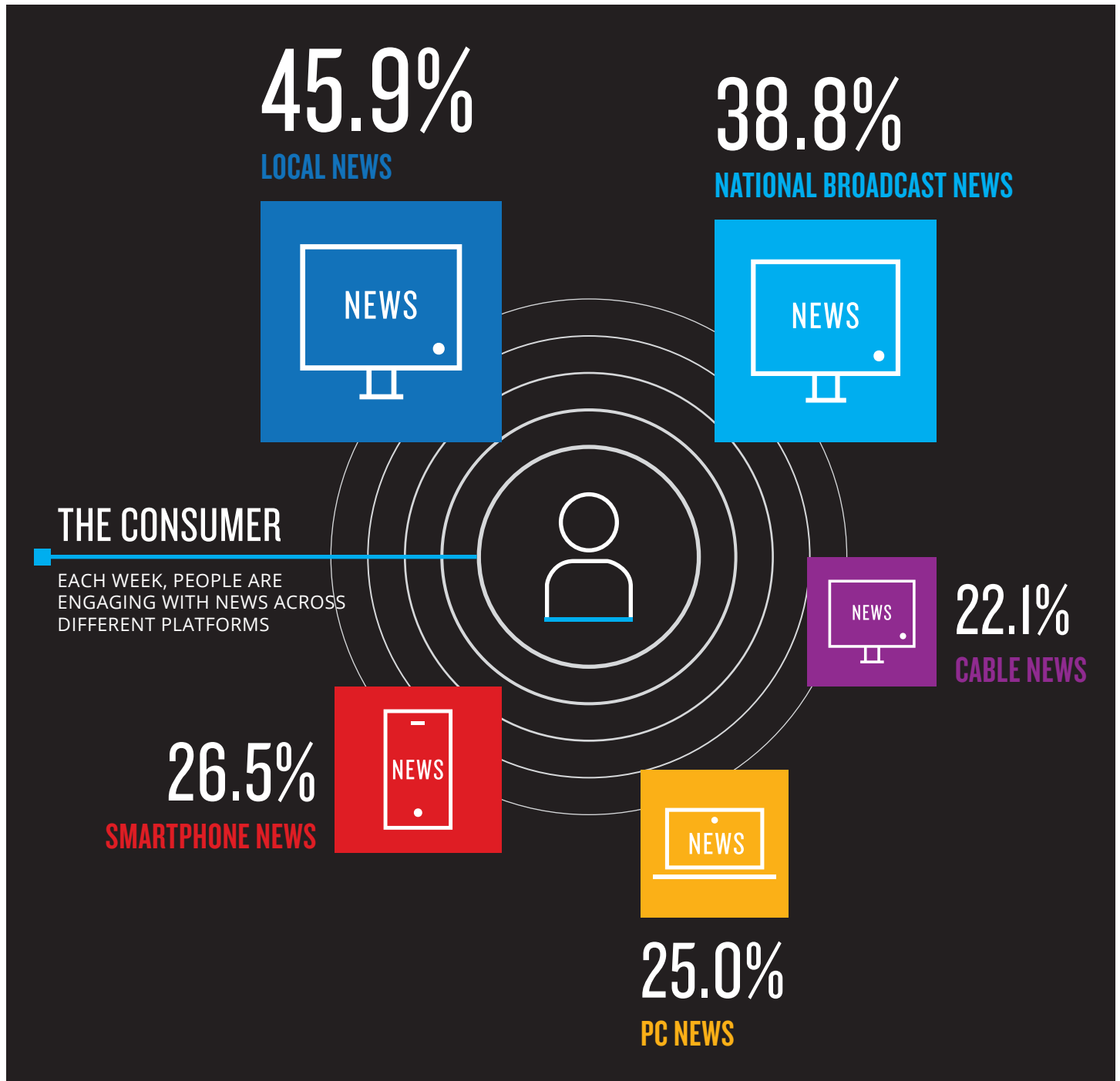


## ACCESS LOCAL NEWS ON A SMARTPHONE

- 154 SALT LAKE CITY
- 147 RALEIGH / DURHAM
- 139 AUSTIN
- 138 OKLAHOMA CITY
- 136 DENVER

# THE UNIVERSE OF NEWS CONSUMPTION

P18+ AVERAGE WEEKLY REACH IN LOCAL PEOPLE METER MARKETS (% OF POPULATION)



## THE CONSUMER

EACH WEEK, PEOPLE ARE ENGAGING WITH NEWS ACROSS DIFFERENT PLATFORMS

Source: NLTV (Local News, National Broadcast News, Cable News), EMM Panel (Smartphone News), Netview (PC News). Reach% based on LPM Population. See sourcing page for methodology details.



# TV USAGE & TECHNOLOGY UPDATE

Q1 2017

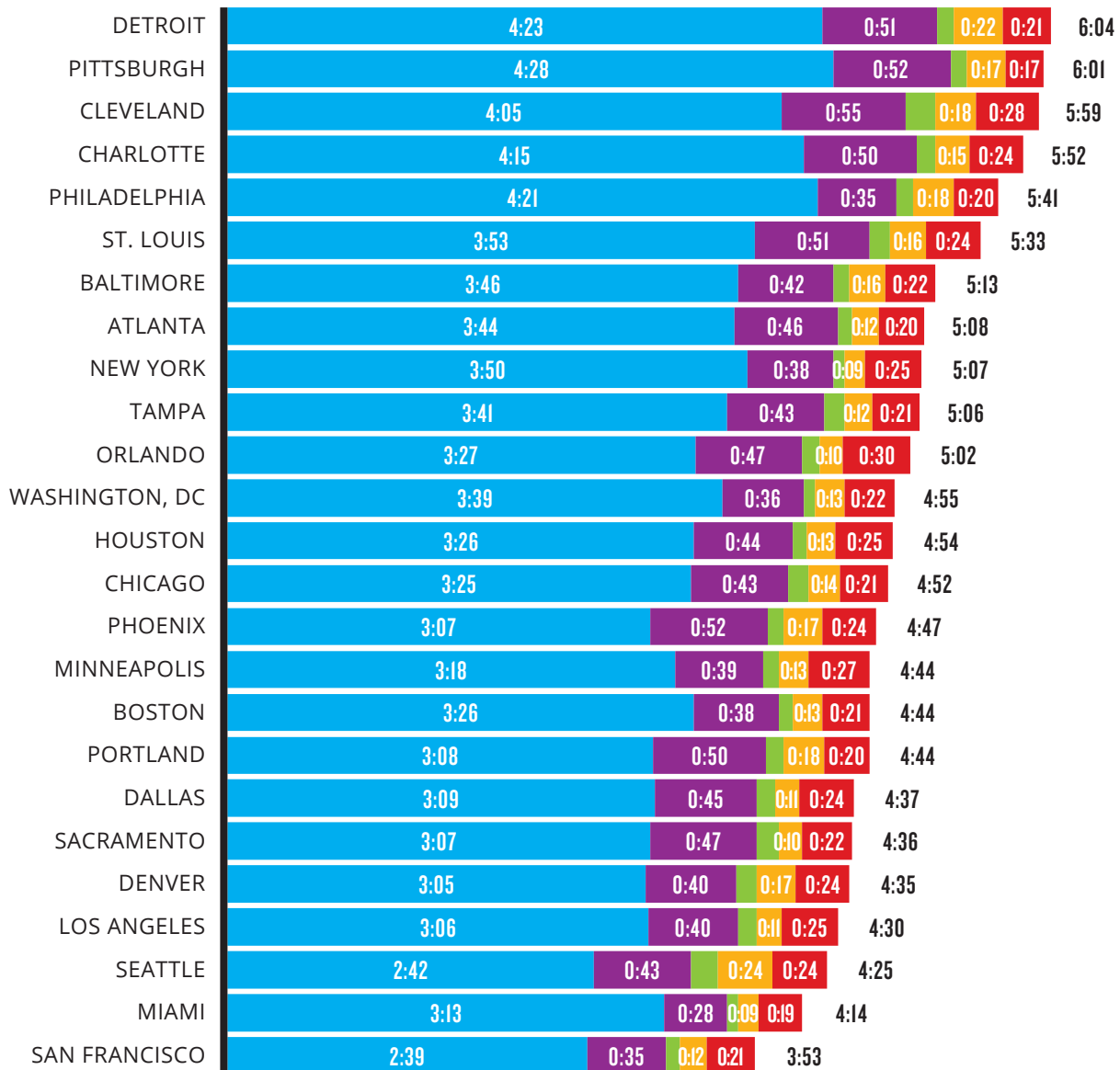




# DAILY TIME SPENT IN LPM MARKETS

AVERAGE DAILY TIME SPENT (HH:MM) PER ADULT 25-54

■ LIVE TV 
 ■ WATCHING TIME-SHIFTED TV 
 ■ DVD/BLU-RAY 
 ■ GAME CONSOLE 
 ■ MULTIMEDIA DEVICE



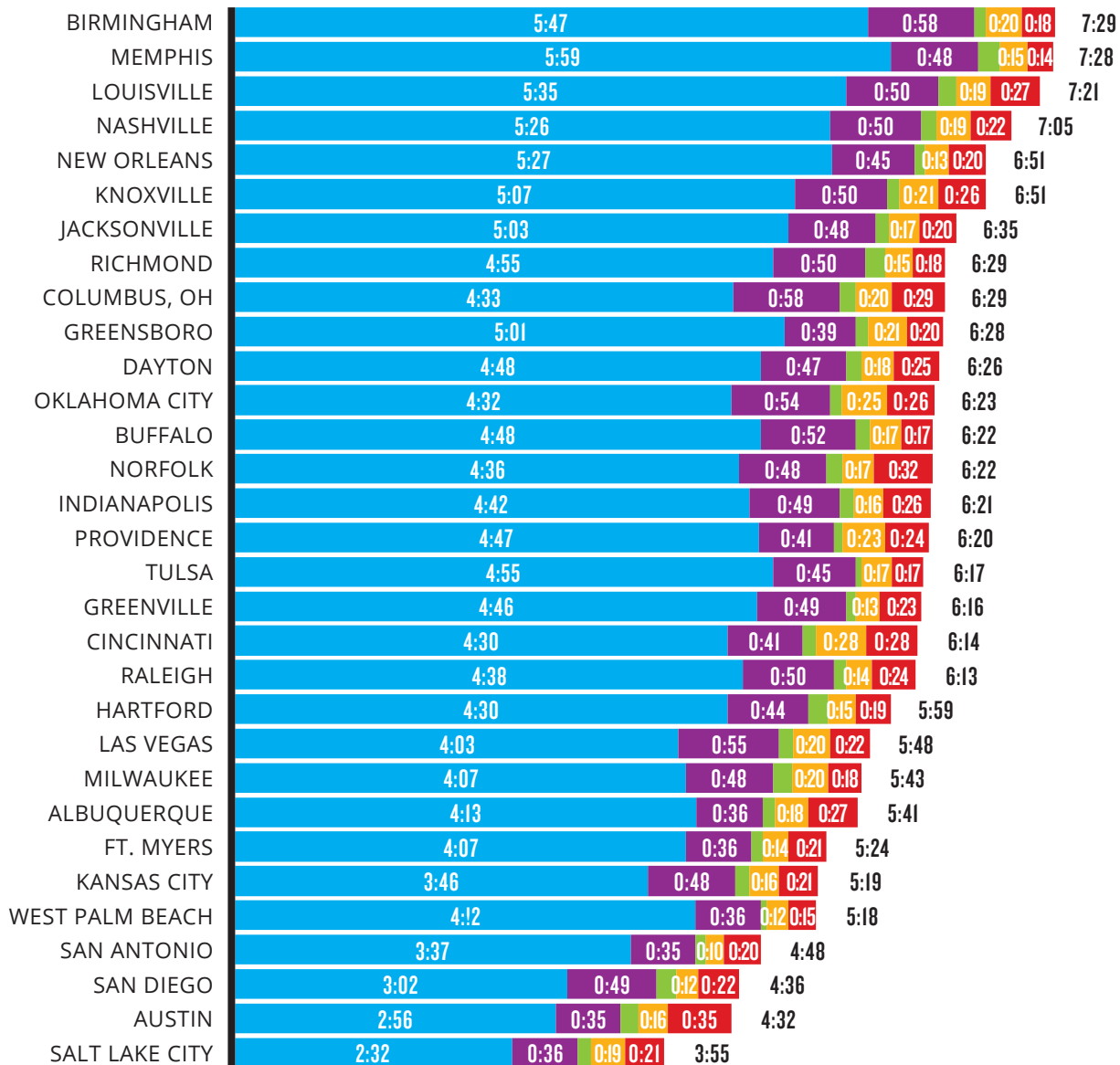
Source: Nielsen Local TV View, Live Data Stream, February 2017, P25-54, based on Total Population

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# DAILY TIME SPENT IN SET METER MARKETS

AVERAGE DAILY TIME SPENT (HH:MM) PER ADULT 25-54

■ LIVE TV 
 ■ WATCHING TIME-SHIFTED TV 
 ■ DVD/BLU-RAY 
 ■ GAME CONSOLE 
 ■ MULTIMEDIA DEVICE



Source: Nielsen Local TV View, Live Data Stream, February 2017, P25-54, based on Total Population

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# DAILY TIME SPENT IN CODE READER MARKETS

AVERAGE DAILY TIME SPENT (HH:MM) PER ADULT 25-54

■ LIVE TV ■ WATCHING TIME-SHIFTED TV

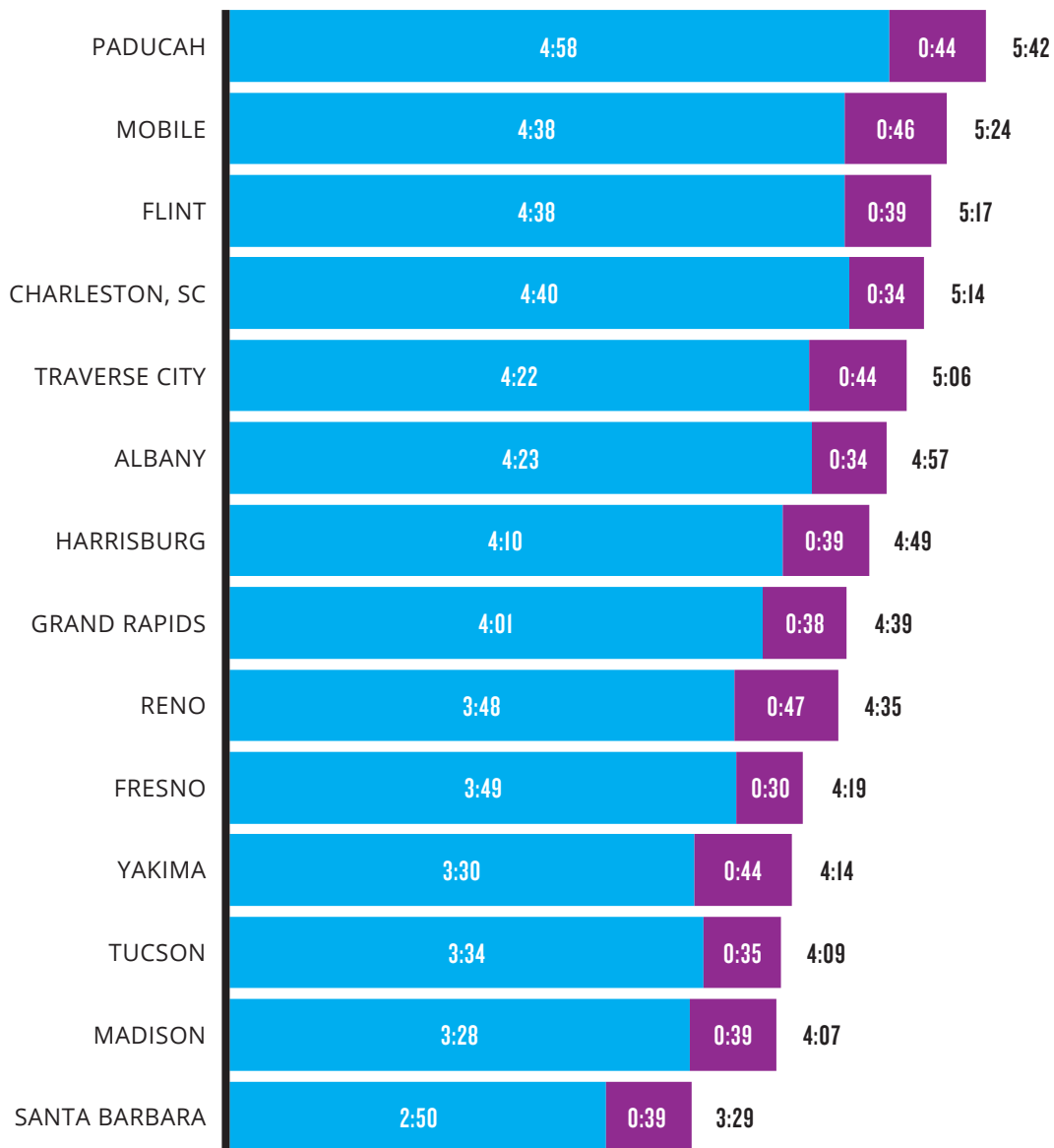



TABLE IA – AVERAGE DAILY TIME SPENT IN LPM MARKETS: YEAR OVER YEAR COMPARISON

PERSONS 25-54	 LIVE TV		 TIME-SHIFTED TV		 DVD/BLU-RAY		 GAME CONSOLE		 MULTIMEDIA DEVICE	
	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17
ATLANTA	4:15	3:44	0:57	0:46	0:08	0:06	0:12	0:12	0:16	0:20
BALTIMORE	4:35	3:46	0:40	0:42	0:07	0:07	0:16	0:16	0:16	0:22
BOSTON	3:38	3:26	0:41	0:38	0:06	0:06	0:15	0:13	0:12	0:21
CHARLOTTE	4:08	4:15	0:49	0:50	0:09	0:08	0:18	0:15	0:21	0:24
CHICAGO	3:34	3:25	0:53	0:43	0:10	0:09	0:15	0:14	0:11	0:21
CLEVELAND	4:44	4:05	0:57	0:55	0:12	0:13	0:24	0:18	0:11	0:28
DALLAS	3:33	3:09	0:48	0:45	0:10	0:08	0:11	0:11	0:22	0:24
DENVER	3:10	3:05	0:46	0:40	0:10	0:09	0:15	0:17	0:20	0:24
DETROIT	4:28	4:23	0:54	0:51	0:12	0:07	0:21	0:22	0:14	0:21
HOUSTON	3:48	3:26	0:40	0:44	0:08	0:06	0:11	0:13	0:15	0:25
LOS ANGELES	2:53	3:06	0:41	0:40	0:08	0:08	0:10	0:11	0:18	0:25
MIAMI	3:27	3:13	0:29	0:28	0:09	0:05	0:07	0:09	0:14	0:19
MINNEAPOLIS	3:19	3:18	0:41	0:39	0:08	0:07	0:15	0:13	0:21	0:27
NEW YORK	4:04	3:50	0:39	0:38	0:05	0:05	0:14	0:09	0:18	0:25
ORLANDO	3:49	3:27	0:50	0:47	0:08	0:08	0:15	0:10	0:14	0:30
PHILADELPHIA	4:23	4:21	0:36	0:35	0:09	0:07	0:19	0:18	0:15	0:20
PHOENIX	3:32	3:07	0:56	0:52	0:08	0:07	0:14	0:17	0:15	0:24
PITTSBURGH	4:43	4:28	0:47	0:52	0:09	0:07	0:23	0:17	0:08	0:17
PORTLAND	3:26	3:08	0:44	0:50	0:12	0:08	0:14	0:18	0:13	0:20
SACRAMENTO	3:28	3:07	0:54	0:47	0:10	0:10	0:21	0:10	0:10	0:22
SAN FRANCISCO	2:42	2:39	0:37	0:35	0:06	0:06	0:08	0:12	0:14	0:21
SEATTLE	3:10	2:42	0:39	0:43	0:11	0:12	0:24	0:24	0:16	0:24
ST. LOUIS	4:14	3:53	0:56	0:51	0:14	0:09	0:14	0:16	0:15	0:24
TAMPA	4:12	3:41	0:37	0:43	0:06	0:09	0:15	0:12	0:11	0:21
WASHINGTON, DC	3:36	3:39	0:37	0:36	0:07	0:05	0:12	0:13	0:20	0:22

Source: Nielsen Local TV View, Persons 25-54, Total Day M-Su 3a-3a. See sourcing page for methodology details.

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TABLE IB – AVERAGE DAILY TIME SPENT BY ETHNICITY: YEAR OVER YEAR COMPARISON

HISPANIC	 LIVE TV		 TIME-SHIFTED TV		 DVD/BLU-RAY		 GAME CONSOLE		 MULTIMEDIA DEVICE	
	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17
CHICAGO	3:15	3:04	0:35	0:19	0:09	0:10	0:13	0:09	0:06	0:15
DALLAS	3:11	2:44	0:29	0:25	0:07	0:04	0:12	0:10	0:11	0:16
DENVER	3:56	3:40	0:34	0:21	0:08	0:09	0:16	0:14	0:25	0:27
HOUSTON	3:18	3:02	0:26	0:23	0:09	0:05	0:06	0:06	0:09	0:25
LOS ANGELES	3:01	3:11	0:29	0:25	0:08	0:09	0:10	0:12	0:14	0:24
MIAMI	2:58	2:39	0:16	0:18	0:05	0:06	0:08	0:10	0:13	0:21
NEW YORK	3:59	4:03	0:22	0:23	0:05	0:08	0:18	0:13	0:17	0:29
PHOENIX	3:50	3:11	0:24	0:24	0:09	0:04	0:12	0:10	0:14	0:27
SACRAMENTO	3:20	3:19	0:46	0:38	0:12	0:11	0:08	0:11	0:09	0:16
SAN FRANCISCO	2:59	3:08	0:27	0:24	0:04	0:04	0:09	0:09	0:12	0:21

AFRICAN-AMERICAN	 LIVE TV		 TIME-SHIFTED TV		 DVD/BLU-RAY		 GAME CONSOLE		 MULTIMEDIA DEVICE	
	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17
ATLANTA	5:37	5:08	0:58	0:50	0:12	0:04	0:14	0:12	0:17	0:19
CHICAGO	5:37	5:50	0:51	0:43	0:16	0:09	0:12	0:24	0:12	0:23
DALLAS	5:39	4:57	0:41	0:54	0:20	0:10	0:08	0:09	0:46	0:37
DETROIT	6:43	6:24	0:50	0:51	0:14	0:12	0:11	0:19	0:12	0:22
HOUSTON	5:57	5:34	0:39	0:51	0:08	0:06	0:22	0:23	0:09	0:24
LOS ANGELES	4:47	5:02	1:02	1:19	0:10	0:08	0:12	0:10	0:11	0:23
MIAMI	4:48	4:42	0:36	0:28	0:13	0:05	0:06	0:12	0:13	0:13
NEW YORK	6:06	5:48	0:46	0:38	0:05	0:04	0:21	0:08	0:11	0:30
PHILADELPHIA	6:17	5:56	0:39	0:35	0:12	0:06	0:21	0:22	0:15	0:21
WASHINGTON, DC	5:19	5:20	0:31	0:36	0:09	0:02	0:09	0:12	0:11	0:20

Source: Nielsen Local TV View, Persons 25-54, Total Day M-Su 3a-3a. See sourcing page for methodology details.

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TABLE IC – AVERAGE DAILY TIME SPENT IN SET METER MARKETS: YEAR OVER YEAR COMPARISON

PERSONS 25-54	LIVE TV		TIME-SHIFTED TV		DVD/BLU-RAY		GAME CONSOLE		MULTIMEDIA DEVICE	
	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17
ALBUQUERQUE	4:25	4:13	0:37	0:36	0:06	0:07	0:18	0:18	0:16	0:27
AUSTIN	3:14	2:56	0:41	0:35	0:11	0:10	0:13	0:16	0:21	0:35
BIRMINGHAM	6:27	5:47	0:52	0:58	0:08	0:06	0:14	0:20	0:11	0:18
BUFFALO	4:57	4:48	0:54	0:52	0:09	0:08	0:16	0:17	0:13	0:17
CINCINNATI	4:58	4:30	0:43	0:41	0:07	0:07	0:17	0:28	0:15	0:28
COLUMBUS, OH	5:00	4:33	0:54	0:58	0:10	0:09	0:17	0:20	0:18	0:29
DAYTON	4:58	4:48	0:47	0:47	0:07	0:08	0:18	0:18	0:16	0:25
FT. MYERS	4:25	4:07	0:40	0:36	0:11	0:06	0:10	0:14	0:16	0:21
GREENSBORO	5:16	5:01	0:54	0:39	0:07	0:07	0:17	0:21	0:16	0:20
GREENVILLE	5:19	4:46	0:48	0:49	0:10	0:05	0:13	0:13	0:20	0:23
HARTFORD	4:40	4:30	0:47	0:44	0:09	0:11	0:14	0:15	0:18	0:19
INDIANAPOLIS	4:51	4:42	0:52	0:49	0:08	0:08	0:19	0:16	0:11	0:26
JACKSONVILLE	5:19	5:03	0:48	0:48	0:11	0:07	0:13	0:17	0:10	0:20
KANSAS CITY	4:17	3:46	0:54	0:48	0:09	0:08	0:13	0:16	0:10	0:21
KNOXVILLE	5:50	5:07	0:45	0:50	0:07	0:07	0:19	0:21	0:11	0:26
LAS VEGAS	4:28	4:03	0:55	0:55	0:08	0:08	0:15	0:20	0:11	0:22
LOUISVILLE	5:41	5:35	0:48	0:50	0:09	0:10	0:16	0:19	0:13	0:27
MEMPHIS	5:56	5:59	0:53	0:48	0:10	0:12	0:10	0:15	0:06	0:14
MILWAUKEE	4:27	4:07	0:43	0:48	0:14	0:10	0:16	0:20	0:12	0:18
NASHVILLE	5:29	5:26	0:55	0:50	0:12	0:08	0:20	0:19	0:11	0:22
NEW ORLEANS	5:20	5:27	0:44	0:45	0:09	0:06	0:14	0:13	0:16	0:20
NORFOLK	5:45	4:36	0:44	0:48	0:09	0:09	0:26	0:17	0:11	0:32
OKLAHOMA CITY	5:19	4:32	0:45	0:54	0:05	0:06	0:20	0:25	0:08	0:26
PROVIDENCE	4:36	4:47	0:43	0:41	0:06	0:05	0:21	0:23	0:13	0:24
RALEIGH	5:05	4:38	0:48	0:50	0:07	0:07	0:17	0:14	0:15	0:24
RICHMOND	5:31	4:55	0:46	0:50	0:09	0:11	0:17	0:15	0:09	0:18
SALT LAKE CITY	2:44	2:32	0:37	0:36	0:09	0:07	0:16	0:19	0:18	0:21
SAN ANTONIO	3:55	3:37	0:42	0:35	0:04	0:06	0:12	0:10	0:17	0:20
SAN DIEGO	3:01	3:02	0:43	0:49	0:09	0:11	0:12	0:12	0:09	0:22
TULSA	5:23	4:55	0:50	0:45	0:06	0:03	0:22	0:17	0:17	0:17
WEST PALM BEACH	4:30	4:12	0:44	0:36	0:06	0:03	0:16	0:12	0:11	0:15

Source: Nielsen Local TV View, Persons 25-54, Total Day M-Su 3a-3a. See sourcing page for methodology details.

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TABLE ID – AVERAGE DAILY TIME SPENT IN CODE READER MARKETS: YEAR OVER YEAR COMPARISON

PERSONS 25-54	LIVE TV		TIME-SHIFTED TV	
	FEB-16	FEB-17	FEB-16	FEB-17
ALBANY	4:45	4:23	0:35	0:34
CHARLESTON, SC	5:00	4:40	0:34	0:34
FLINT	4:50	4:38	0:36	0:39
FRESNO	3:49	3:49	0:32	0:30
GRAND RAPIDS	4:13	4:01	0:36	0:38
HARRISBURG	4:40	4:10	0:38	0:39
MADISON	3:49	3:28	0:39	0:39
MOBILE	4:53	4:38	0:45	0:46
PADUCAH	5:02	4:58	0:45	0:44
RENO	3:36	3:48	0:47	0:47
SANTA BARBARA	2:43	2:50	0:37	0:39
TRAVERSE CITY	4:24	4:22	0:35	0:44
TUCSON	3:51	3:34	0:30	0:35
YAKIMA	3:33	3:30	0:33	0:44





TABLE 2A – DEVICE PENETRATION IN LPM MARKETS: YEAR OVER YEAR COMPARISON

	 TABLET		 SVOD		 SMART PHONE		 SMART TV	
	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17
ATLANTA	70%	70%	54%	60%	88%	90%	24%	31%
BALTIMORE	65%	66%	53%	60%	86%	87%	23%	31%
BOSTON	67%	70%	59%	66%	82%	85%	25%	32%
CHARLOTTE	57%	60%	55%	56%	83%	90%	21%	26%
CHICAGO	60%	64%	53%	59%	83%	89%	25%	32%
CLEVELAND	55%	60%	43%	48%	75%	79%	22%	29%
DALLAS	58%	66%	54%	60%	88%	91%	26%	35%
DENVER	58%	60%	58%	65%	84%	87%	26%	32%
DETROIT	61%	64%	48%	54%	90%	90%	24%	27%
HOUSTON	61%	65%	48%	56%	91%	92%	26%	34%
LOS ANGELES	65%	68%	57%	63%	89%	91%	26%	36%
MIAMI	58%	62%	47%	53%	89%	91%	25%	31%
MINNEAPOLIS	58%	61%	53%	61%	80%	86%	25%	31%
NEW YORK	66%	69%	56%	60%	85%	89%	28%	33%
ORLANDO	59%	66%	50%	56%	85%	87%	26%	34%
PHILADELPHIA	60%	66%	52%	61%	82%	86%	21%	30%
PHOENIX	60%	65%	53%	59%	83%	89%	24%	33%
PITTSBURGH	50%	56%	43%	51%	73%	79%	19%	27%
PORTLAND	58%	63%	60%	64%	83%	86%	24%	31%
SACRAMENTO	60%	66%	52%	59%	83%	89%	23%	33%
SAN FRANCISCO	64%	69%	58%	64%	84%	88%	28%	33%
SEATTLE	61%	69%	58%	68%	82%	88%	28%	37%
ST. LOUIS	60%	65%	47%	52%	79%	85%	23%	27%
TAMPA	58%	62%	48%	53%	81%	86%	21%	31%
WASHINGTON, DC	70%	68%	60%	65%	87%	91%	31%	33%

Source: Nielsen NPOWER, TV Households, excludes BBO Homes, FEB-16 = 2/15/16, FEB-17 = 2/15/17

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TABLE 2B – DEVICE PENETRATION IN SET METER MARKETS: YEAR OVER YEAR COMPARISON

	 TABLET		 SVOD		 SMART PHONE		 SMART TV	
	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17	FEB-16	FEB-17
ALBUQUERQUE	44%	51%	43%	49%	73%	80%	18%	26%
AUSTIN	53%	56%	58%	64%	85%	88%	26%	33%
BIRMINGHAM	43%	46%	38%	45%	73%	81%	15%	23%
BUFFALO	48%	55%	45%	54%	68%	78%	18%	26%
CINCINNATI	52%	57%	48%	55%	75%	81%	19%	28%
COLUMBUS, OH	59%	63%	54%	60%	80%	83%	21%	29%
DAYTON	54%	60%	43%	49%	72%	78%	20%	27%
FT. MYERS	58%	65%	44%	50%	76%	85%	22%	32%
GREENSBORO	53%	54%	46%	47%	72%	80%	16%	23%
GREENVILLE	50%	53%	37%	46%	67%	73%	18%	24%
HARTFORD	61%	65%	56%	60%	78%	80%	26%	32%
INDIANAPOLIS	57%	63%	45%	51%	78%	85%	21%	27%
JACKSONVILLE	58%	66%	47%	57%	80%	87%	26%	30%
KANSAS CITY	50%	52%	48%	58%	77%	80%	20%	29%
KNOXVILLE	55%	60%	36%	49%	75%	84%	20%	28%
LAS VEGAS	54%	55%	51%	55%	82%	86%	28%	33%
LOUISVILLE	54%	62%	41%	50%	76%	82%	15%	22%
MEMPHIS	39%	45%	34%	38%	75%	81%	13%	19%
MILWAUKEE	55%	64%	49%	56%	76%	82%	23%	30%
NASHVILLE	57%	59%	44%	50%	78%	83%	19%	25%
NEW ORLEANS	46%	51%	45%	51%	79%	83%	18%	24%
NORFOLK	69%	68%	52%	55%	85%	86%	22%	35%
OKLAHOMA CITY	50%	55%	46%	52%	81%	86%	19%	28%
PROVIDENCE	56%	60%	53%	61%	74%	80%	17%	28%
RALEIGH	59%	62%	51%	55%	80%	88%	25%	29%
RICHMOND	56%	64%	43%	52%	78%	84%	25%	30%
SALT LAKE CITY	58%	67%	63%	68%	81%	86%	23%	32%
SAN ANTONIO	47%	46%	49%	59%	80%	85%	22%	32%
SAN DIEGO	62%	65%	62%	64%	82%	88%	27%	39%
TULSA	50%	58%	38%	45%	78%	82%	19%	24%
WEST PALM BEACH	53%	61%	46%	53%	78%	86%	26%	34%

Source: Nielsen NPOWER, TV Households, excludes BBO Homes, FEB-16 = 2/15/16, FEB-17 = 2/15/17

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# SOURCING AND METHODOLOGIES



## DEFINITION OF NEWS

NEWS TYPE	SOURCE	METHODOLOGY DETAILS
LOCAL NEWS	NLTV Program Report	Broadcast - ABC, CBS, FOX, NBC, IND, TEL*, UNI* Average Quarter Hour, Local News Genre, Total Day, Live+SD
NATIONAL BROADCAST NEWS	NLTV Program Report	Broadcast - ABC, CBS, FOX, NBC, TEL*, UNI* Average Quarter Hour, News Genre, Total Day, Live+SD
CABLE NEWS	NLTV Time Period Report	CNBC, CNN, FOXNC, MSNBC Average Quarter Hour, Total Day, Live+SD
COMPUTER NEWS	Netview	Current Events & Global News Subcategory
SMARTPHONE NEWS	EMM	Current Events & Global News Subcategory

*\*Telemundo and Univision affiliates not available in all markets*



## WEEKLY TIME SPENT, REACH PERCENTAGES

**Television** – Full year 2015 and 2016 (Jan. 1 – Dec. 31), First Quarter 2017 (Jan. 1 - March 31, 2017). Calculations based on Weekly Gross Minutes across LPM, Set Meter and Code Reader Markets. Reach based on 5 minute qualifier. Population estimates based on Nielsen Universe Estimates among included markets.

**Computer and Smartphone** – First quarter 2015, 2016 and 2017. Based on LPM market aggregate. Calculations based on Weekly Gross Minutes. Reach based on second level duration crediting. Time spent and reach calculations based on LPM market Universe Estimates.



## TELEVISION METHODOLOGY

Live TV includes live usage within the measurement period. DVR/Time-shifted TV is playback primarily on a DVR but includes playback from video on demand, DVD recorders, server based DVR's and services like Start Over. TV-connected devices (DVD, Game Console, Multimedia Device) includes when these devices are in use for any purpose, not just for accessing media content. For example, Game Console would also include when the game console is being used to play video games. Multimedia Devices is a combination of usage of the Internet Connected Devices viewing source and Audio-Video viewing source. It includes viewing on an Apple TV, Roku, Google Chromecast, Smartphone, Computer/Laptop, etc. connected to the TV. All data was pulled from Nielsen Local TV View and is based on average quarter hour.



## ONLINE METHODOLOGY

Nielsen's Online Panel is recruited through both probability-weighted and convenience panels which are recruited in both Spanish and English. Panelists download Nielsen's NetSight meter, which identifies which browser, tab, Internet application (including media players and instant messaging) or desktop application is in focus. Usage is tracked through metered measurement of Internet panel users at both home and work. Hours: minutes for Internet are based on the universe of persons who used the Internet and are based on monthly averages. All data is derived from Nielsen Netview. Meter collection capability improved in February 2016, which generally resulted in increased duration metrics and minor declines in audience and page view metrics.



## MOBILE METHODOLOGY

Nielsen's Electronic Mobile Measurement (EMM) is an observational, user-centric approach that uses passive metering technology on smartphones to track device and application usage on an opt-in convenience panel, recruited online and in English and Spanish. To ensure the data are representative of the mobile population, weighting controls are applied across gender, age, income, race and ethnicity. In addition, enumeration studies are continuously applied to provide the most current estimates of the mobile population. Nielsen implemented crediting enhancements to improve the reporting of mobile usage in March 2016 and August 2016. A legacy crediting rule that limited usage at 30 minutes was removed, resulting in app/web visits exceeding 30 minutes to credit towards the app or website.



## MARKET TYPES

**Local People Meter (LPM):** Top 25 DMAs measured by an electronic people meter, providing daily information about what is viewed on a TV set and which members of the household are watching.  
*Markets: Atlanta, Baltimore, Boston, Charlotte, Chicago, Cleveland, Dallas, Denver, Detroit, Houston, Los Angeles, Miami, Minneapolis, New York, Orlando, Philadelphia, Phoenix, Pittsburgh, Portland, Sacramento, San Francisco, Seattle, St. Louis, Tampa, Washington, D.C.*

**Set Meter:** 31 mid-size markets that provide tuning information on daily basis. Viewer assignment provides demographic information about who is watching.  
*Markets: Albuquerque, Austin, Birmingham, Buffalo, Cincinnati, Columbus, Ohio, Dayton, Ft. Myers, Greensboro, Greenville, Hartford, Indianapolis, Jacksonville, Kansas City, Knoxville, Las Vegas, Louisville, Memphis, Milwaukee, Nashville, New Orleans, Norfolk, Oklahoma City, Providence, Raleigh, Richmond-Petersburg, Salt Lake City, San Antonio, San Diego, Tulsa, West Palm Beach*

**Code Reader:** 14 smaller markets measured by a device that tracks audio codes to determine household tuning. Viewer assignment provides demographic information about who is watching.  
*Markets: Albany-Schenectady-Troy, Charleston, S.C., Flint, Fresno, Grand Rapids, Harrisburg, Madison, Mobile-Pensacola, Paducah, Reno, Santa Barbara, Traverse City, Tucson, Yakima*





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