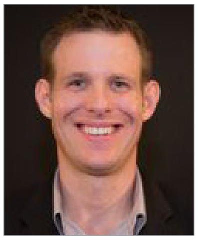
AUDIENCE INSIGHTS

NIELSEN LOCAL WATCH REPORT

TV STREAMING ACROSS OUR CITIES | AUGUST 2019



JUSTIN LAPORTE
VP, LOCAL INSIGHTS

INTRODUCTION

There's no mistaking the impact that streaming and on-demand video are having across the media landscape, and these trends are just as significant at the local level as the national. Local markets need accurate and reliable insights into the media landscape as they navigate their daily business decisions just as much as national players—perhaps even more so.

As on-demand options have become firmly embedded in our media diets, this edition of the Nielsen Local Watch Report takes a close look at what video streaming behavior looks like, and what it will look like tomorrow. These are critical insights for local stations, programmers and advertisers as they navigate today's competitive landscape. The reality is, if consumers aren't engaging with their content, they lose traction in the marketplace—one that is dictated more and more by consumer demand.

Today, no two viewing options are the same—and audience measurement needs to be able to parse out the variables and deliver data for apples-to-apples comparisons. For consumers, it comes down to choice—and consumers have access to a myriad of channels and platforms, each of which falls into its own category. Think about how you engage with your favorite program. Perhaps you're in a fast-paced metro area on the East Coast where your enabled Smart TV gives you just what you need to binge through the latest season of your favorite paranormal teen drama. On the flipside, you might be nestled into the Heartland states, watching the clock tick down to when your new favorite game show starts, which you'll tune into through your over-the-air antenna. Then there's the vMVPD users—those who can stream local station content and live feeds from cable networks using an internet enabled device.

Here are some highlights from our recent local measurement research:

- 56% of U.S. adults are streamers
- Streamers are younger, earn more and have likely attained more education than non-streamers
- Austin is the top streaming market in terms of reach, with 70% of the adult population having streamed content in May 2019
- Adults in Cleveland spend the most time streaming content each day at 2 hours and 29 minutes
- 77% of streamers have access to broadcast stations and cable networks via traditional cable providers or vMVPDs
- Streamers are big consumers of local news
- 82% of adult streamers watch linear broadcast stations, and almost 90% watch linear cable networks
- 87% of the adults who stream on the TV set in West Palm Beach live in a traditional cable home

The bottom line is this: As local markets continue to see growth in non-linear TV usage, deeper insights are needed to drive smarter business decisions. From Austin, where the largest percent of adults are reached, to Pittsburgh, where only 45% of adults stream, every entity that touches the local ad space in any market has to have clear insight into who's watching what, and how. Nielsen is committed to keeping up with these changes to power insights and innovations that will help the ever-evolving industry continue to transform.

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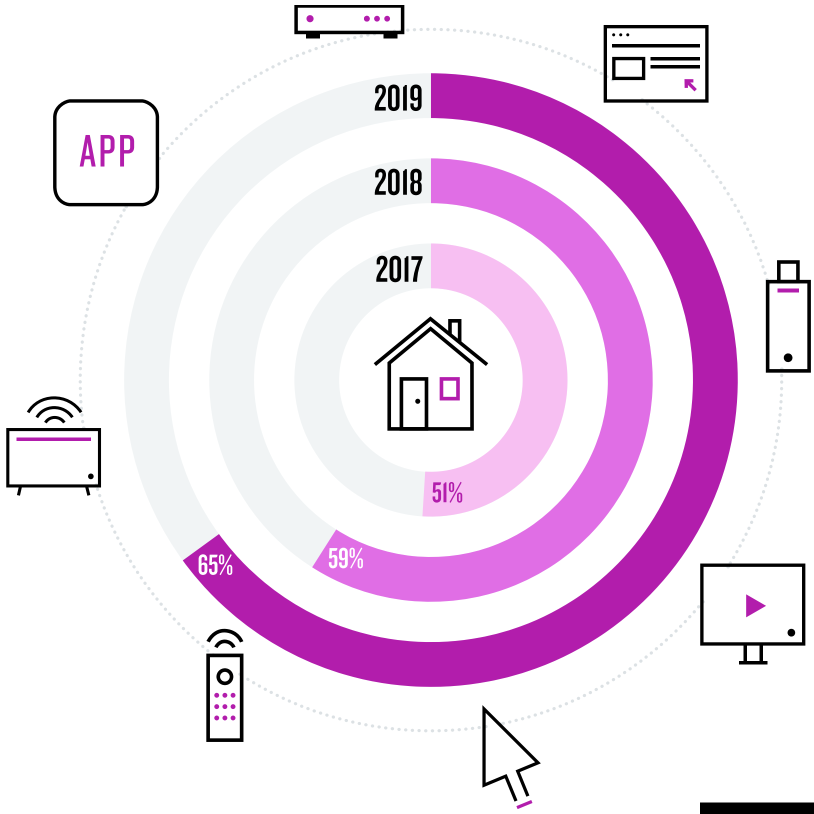
Note: The term “streamers” describes the universe of adults 18+ who were exposed to at least one minute of non-linear content via an Internet Connected Device (Roku, Apple TV, Google Chromecast) or app/web usage on a Smart TV during May 2019. For the sake of clarity, this excludes any streaming that may have been done on a video game console. It is possible that some of the “non-streamers” mentioned in this report did stream outside of the May 2019 period selected for this study.

THE EXPANDING STREAMING UNIVERSE

PERCENT OF HOUSEHOLDS WITH AN ENABLED INTERNET CONNECTED DEVICE OR SMART TV



More devices, services and apps enter the TV marketplace every year, offering more ways for consumers to access video content. There's no better time than now for businesses in the local TV space to dig in and decide how to leverage everything this new world has to offer. As of May 2019, 65% of U.S. households have an enabled internet-connected device or Smart TV capable of streaming content to the TV set, and 70% of U.S. homes have a subscription video-on demand (SVOD) service. As streaming devices enter the living rooms of more Americans each year, audiences are exploring and embracing the convenience of on-demand video content.

TOP MARKETS FOR OWNERSHIP OF AN ENABLED INTERNET CONNECTED DEVICE OR SMART TV (MAY 2019)

LPM
SAN FRANCISCO 74%

SET METER
SALT LAKE CITY 74%

Source: Nielsen NPOWER. Penetration percents based on Nielsen Average Scaled Install Counts for the 15th day of May. Includes Broadband Only (BBO) homes.

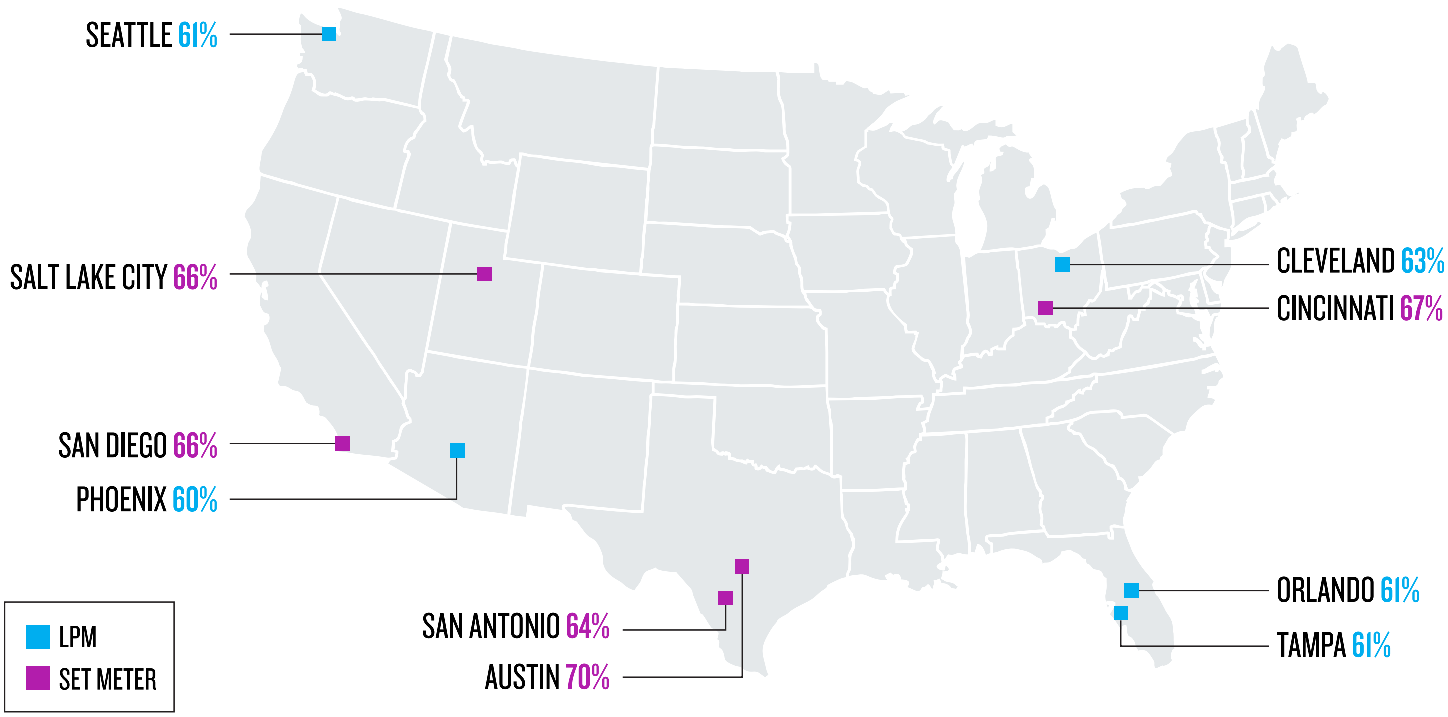
AS OF MAY 2019,

134.2 MILLION

(OR 56%) OF ADULTS NATIONALLY STREAMED NON-LINEAR VIDEO TO THEIR TV SET THROUGH AN INTERNET-CONNECTED DEVICE OR SMART TV

While the existence of TV streamers spans the country, certain geographies have a higher concentration of them. In the map below, we highlighted the top reaching cities for TV streamers. Currently, Austin tops the list with 7 out of 10 adults having streamed in May 2019. Cincinnati, Salt Lake City and San Diego are following close behind. Local clients in these markets have an opportunity to monetize content in new ways and win back an audience that many advertisers aim to reach.

TOP MARKETS FOR TV STREAMING ADULTS



Read as: 70% of adults in Austin streamed to the TV set in May 2019

Source: Nielsen NPOWER. May 2019 local survey (April 25 – May 22, 2019). Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Based on all installed homes in panel, including Broadband Only (BBO).

HOW MANY | HOW OFTEN | HOW LONG

To truly understand the behavior of TV streaming, we've broken things down into "pieces" — "How Many, How Often, How Long" — which ultimately serve as the building blocks for Nielsen ratings. Almost 40 million more adults streamed in 2019 compared to 2017. To help put that number into perspective — it's nearly the same as the amount of adults living in a TV home in New York, Los Angeles, Chicago and Philadelphia combined. As of May 2019, during a typical day that an adult streams, they spend over two hours doing it. That equates to nearly the same amount of time spent watching a full length movie at the cinema.

TOP MARKETS FOR TIME SPENT STREAMING (MAY 2019)

LPM
CLEVELAND 2:29

SET METER
ALBUQUERQUE 2:08

AVERAGE REACH AND TIME SPENT STREAMING AMONG INTERNET CONNECTED DEVICE USERS 18+

	2017	2018	2019
AVG MONTHLY REACH	95.9M	115.1M	134.2M
AVG MONTHLY REACH %	40%	48%	56%
AVG DAYS REACHED	9	10	11
AVG HH:MM PER TUNING DAY	1:52	1:56	2:04

Source: Nielsen NPOWER. May 2019 local survey (April 25 – May 22, 2019). Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Based on all installed homes in panel, including Broadband Only (BBO).

STREAMING BY AGE GROUP

MONTHLY REACH AND TIME SPENT STREAMING TO THE TV SET

	ADULTS 18-34	ADULTS 25-54	ADULTS 55+
HOW MANY	64%	65%	42%
HOW OFTEN	11	12	10
HOW LONG	2:11	2:06	1:59

While the majority (56%) of adults streamed non-linear content to their TV in May 2019, the degree of engagement differs by age. Younger adults, who are more likely to have access to connected devices and SVOD, are more likely to stream compared with their older counterparts, and they spend more time doing it. Older adults are more likely to live in over-the-air or traditional cable homes with higher exposure to linear broadcast and cable content.

Source: Nielsen NPOWER. May 2019 local survey (April 25 – May 22, 2019). Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Based on all installed homes in panel, including Broadband Only (BBO).

STREAMING BY ETHNICITY

With a growing diverse population in the U.S., marketers and content creators need to understand how race and ethnicity play into viewing behaviors. It's not good enough to rely on general market data. A comparison of TV streaming across ethnic groups reveals some surprising similarities and differences. As a local researcher, you may be thinking how you can make heads or tails of this. While the number of days is exactly the same across all of these diverse groups, maybe you are in Atlanta or Cleveland where Black consumers make up a considerable part of your audience. In these cases, it would be good to know that black consumers spend nearly a half hour more per day streaming than the rest of the market. In cities like San Francisco with larger Asian-American populations, it's worth knowing that these consumers have the highest streaming reach, yet spend slightly less time viewing than the average adult.

	HOW MANY AVG REACH (%)	HOW OFTEN AVG DAYS/MONTH	HOW LONG AVG HH:MM PER DAY
TOTAL U.S.	56%	11	2:04
WHITE	55%	11	1:58
BLACK	51%	11	2:33
HISPANIC	59%	11	2:05
ASIAN-AMERICAN	68%	11	2:01

Source: Nielsen NPOWER. May 2019 local survey (April 25 – May 22, 2019). Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Based on all installed homes in panel, including Broadband Only (BBO).

HOW STREAMERS GET TV CONTENT

Another hot topic in local media is how homes get their TV content. This is undergoing recent shifts, with more homes opting to receive content Over-the-Air (OTA) or via Broadband Only (BBO) connections. As of May 2019, 69% of adults who stream to their TV sets are considered a traditional home with cable or satellite. While these make up the majority, we are seeing growth in other household types. Streamers are more likely than average to be in alternative provider homes such as broadband only and those with a virtual multi-channel video programming distributor (vMVPD).

SERVICE PROVIDER COMPOSITION AMONG TV STREAMERS

	CABLE PLUS	OTA	BBO	vMVPD
MAY 2019	69.0%	11.5%	11.3%	8.3%
MAY 2018	72.9%	11.6%	9.6%	5.9%

TOP MARKETS (MAY 2019) FOR PERCENT OF ADULTS WHO STREAM IN...

vMVPD HOMES
KNOXVILLE 13%

OTA HOMES
MILWAUKEE 23%

BBO HOMES
RALEIGH 17%

CABLE PLUS HOMES
WEST PALM BEACH 87%

TV STREAMER REACH BY SERVICE PROVIDER STATUS

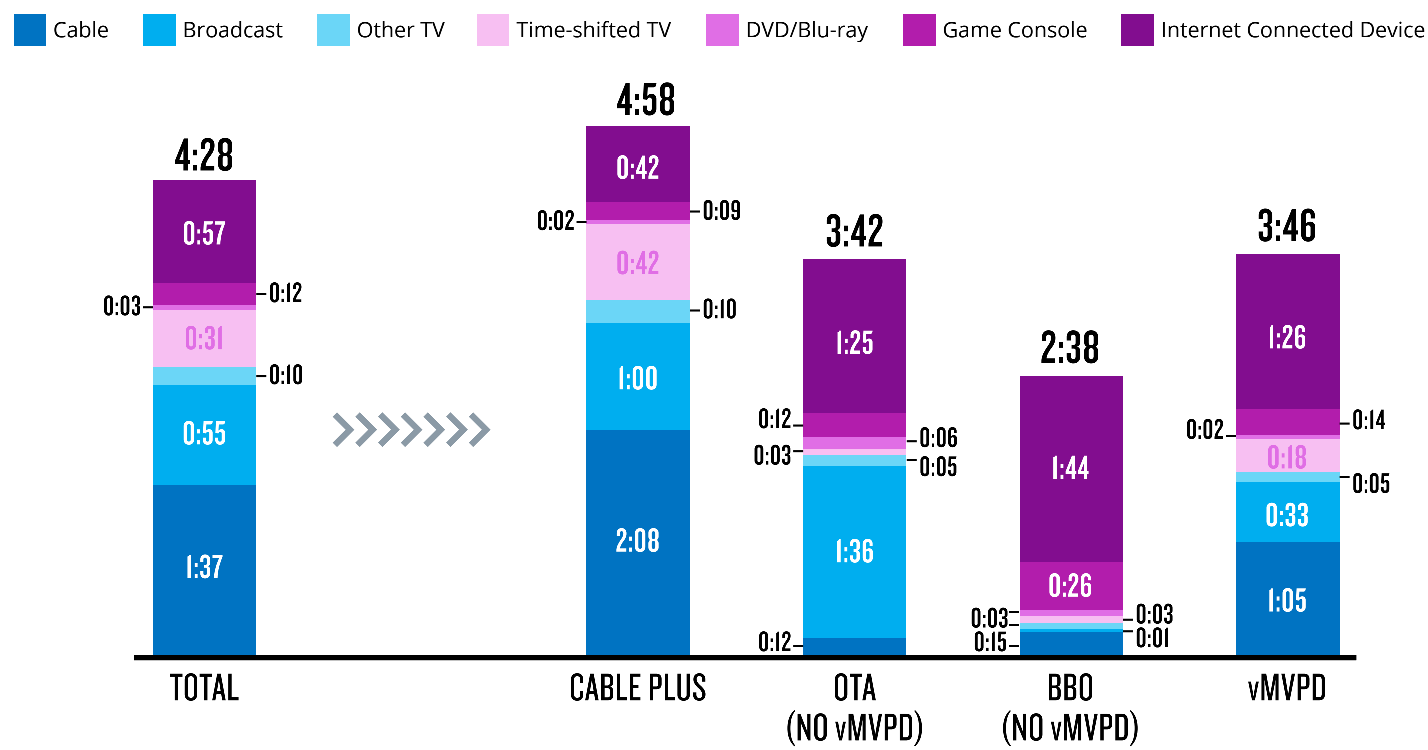
	MAY 2018	MAY 2019	% DIFFERENCE
CABLE PLUS	83.9M	92.6M	+10%
OTA (NO vMVPD)	13.3M	15.4M	+16%
BBO (NO vMVPD)	11.1M	15.1M	+36%
vMVPD	6.8M	11.1M	+63%
TOTAL	115.1M	134.2M	+17%

Source: Nielsen NPOWER. Streaming Adults 18+. May 2019. Streaming includes viewing of at least one minute through an Internet Connected device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Cable Plus group includes wired cable, satellite and ADS homes. Broadband Only homes do not have Over-the-Air or Traditional cable. Cable Plus, OTA and BBO groups exclude homes that also subscribe to a vMVPD.

STREAMERS' TV USAGE

Time spent streaming varies significantly depending on service provider access. Not surprisingly, homes without traditional cable—especially BBO homes—are heavier users of streaming devices. With the absence of traditional cable programming, these homes are finding ways to access video through subscription on-demand services. To capture eyeballs in heavier streaming OTA, BBO and vMVPD homes, a strong local strategy should include making content available through local apps or other streaming services.

DAILY TIME SPENT (HH:MM) AMONG STREAMING ADULTS



% OF STREAMING ADULTS	TOTAL	CABLE PLUS	OTA (NO vMVPD)	BBO (NO vMVPD)	vMVPD
	100.0%	69.0%	11.5%	11.3%	8.3%

43% OF TV USAGE IN OTA HOMES IS TO BROADCAST STATIONS

66% OF TV USAGE IN BBO HOMES HAPPENS VIA A STREAMING DEVICE

29% OF TV USAGE IN vMVPD HOMES IS TO CABLE NETWORKS

Source: Nielsen NPOWER, Live data stream. Streaming Adults 18+. May 2019. Streaming includes viewing of at least one minute through an Internet Connected device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Cable Plus group includes wired cable, satellite and ADS homes. Broadband Only homes do not have Over-the-Air or Traditional cable. Other TV includes any unencoded linear content that cannot be assigned to broadcast or cable. Cable Plus, OTA and BBO groups exclude homes that also subscribe to a vMVPD.

UNDERSTANDING STREAMERS AND NON-STREAMERS

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

Streamers have a huge value proposition, as they are younger, and many have children in their homes. They're also more likely to be college graduates who are employed and earn a higher income than non-streamers. Non-streamers are just as important and fit a profile that is highly coveted by insurance providers, health care and financial institutions.

STREAMERS

These adults viewed at least one minute of streaming content through an Internet Connected device during May 2019. They make up 56% of U.S. adults.

NON-STREAMERS

These adults were not exposed to any streaming content on an Internet Connected device during May 2019. They make up 44% of U.S. adults.

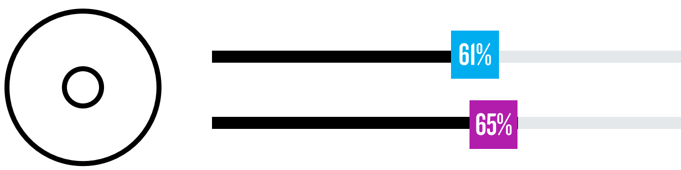
STREAMERS		NON-STREAMERS
50	AGE	62
36%	MULTICULTURAL	33%
44%	HAVE CHILDREN	28%
73%	EMPLOYED	55%
$69,400	MEDIAN INCOME	$44,800
43%	COLLEGE GRAD	31%

Source: Nielsen NPOWER. May 2019 local survey (April 25 – May 22, 2019). Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Based on all installed homes in panel, including Broadband Only (BBO). Multicultural includes Hispanic, Black, Asian-American or Other Race.

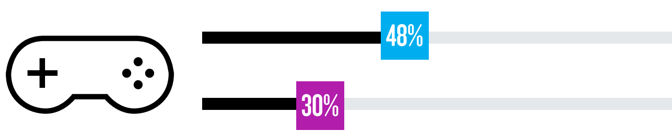
WHAT THEY OWN

Streamers are highly connected, with multiple ways to access content. They index high for Smart TV, connected device, video game console and personal devices. These are key categories for advertisers that are big in consumer electronics. While non-streamers fall well below in those categories, they are more likely to own a DVD Blu-ray player or Digital Video Recorder.

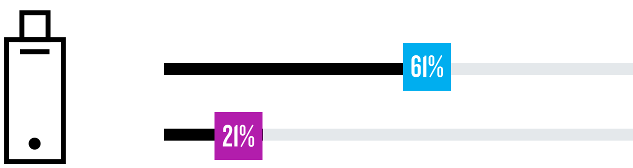
DVD/BLU-RAY PLAYER



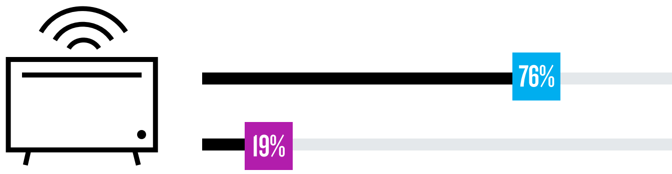
INTERNET ENABLED VIDEO GAME CONSOLE



INTERNET CONNECTED DEVICE

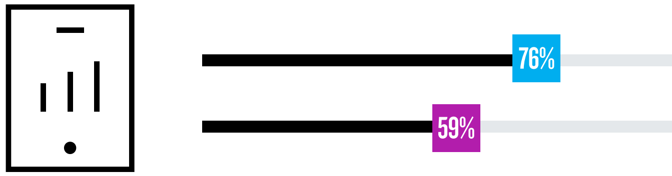


INTERNET ENABLED SMART TELEVISION



SMARTPHONE

TABLET



DIGITAL VIDEO RECORDER (DVR)

STREAMERS

NON-STREAMERS

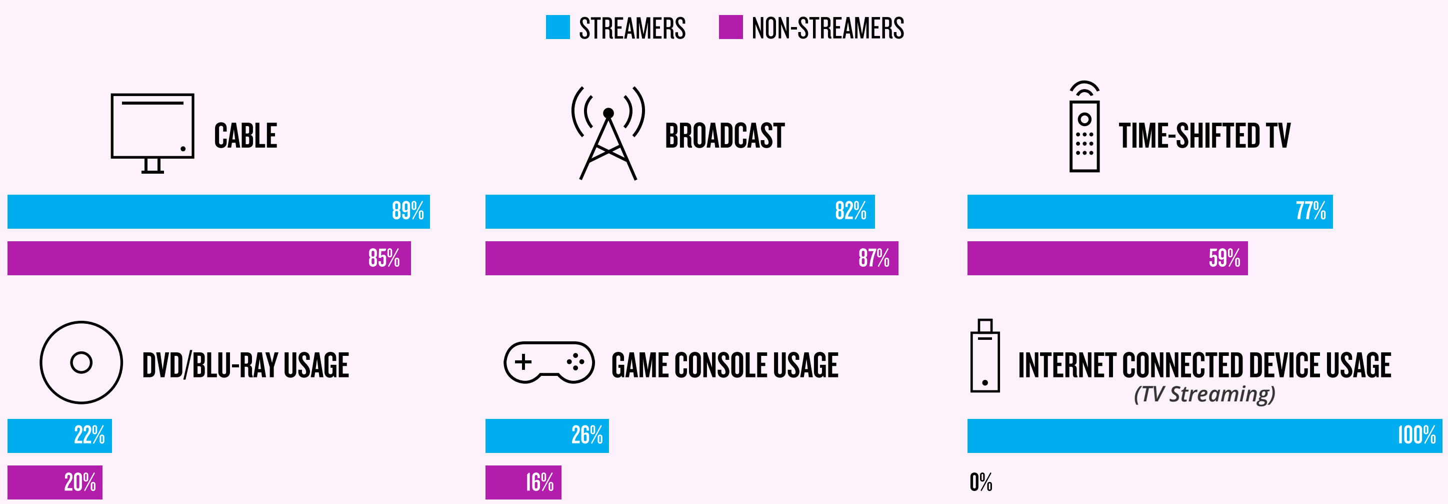
Read as: 61% of Streaming Adults live in Households with access to a DVD/Blu-ray player.

Source: Nielsen NPOWER. Based on the 15th of May, 2019. Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Based on all installed homes in panel, including Broadband Only (BBO).

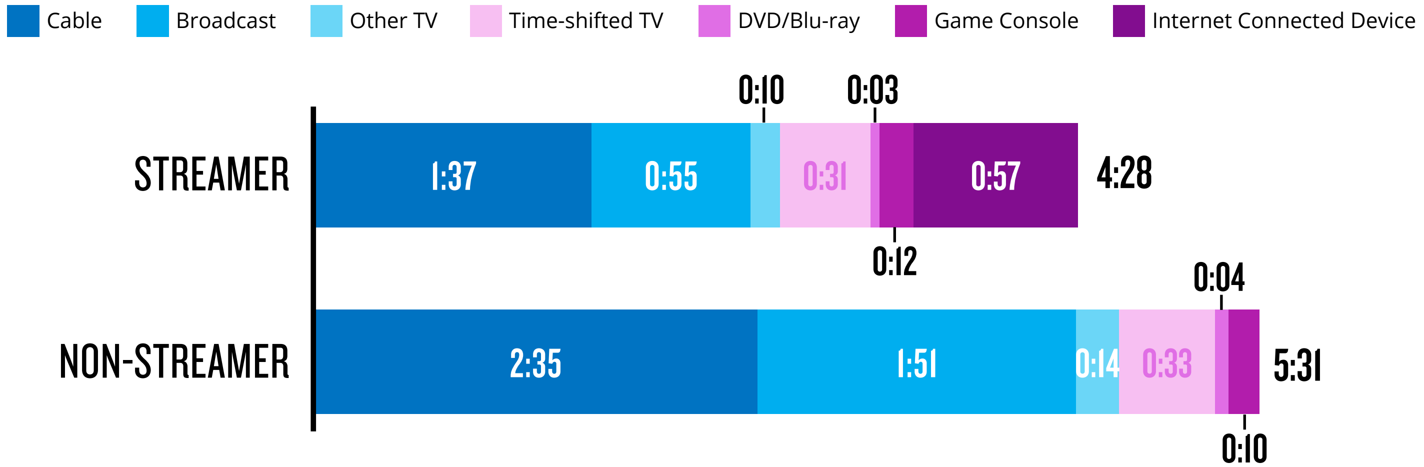
TRADITIONAL TV IS BIG WHETHER YOU STREAM OR NOT

Local TV media, including stations, cable and agencies, cannot ignore that streamers are still spending most of their media time with traditional TV. Including them in a local TV ad budget is critical. Watching broadcast stations and cable networks plays a big part in the lives of both streamers and non-streamers. Streamers spend two hours and 32 minutes watching broadcast and cable, while non-streamers spend a whopping four hours and 26 minutes. That is a big window of time to reach consumers with your advertisements.

AVERAGE MONTHLY REACH BY TELEVISION SOURCE AMONG ADULTS



DAILY TIME SPENT (HH:MM) AMONG ADULTS



Source: Nielsen NPOWER. May 2019 local survey (April 25 – May 22, 2019). Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Other TV includes any unencoded linear content that cannot be assigned to broadcast or cable. Based on all installed homes in panel, including Broadband Only (BBO).

COMMUNITY CONNECTIONS

Streamers seek out local content and care about their communities. Over 50% watch traditional local news on TV and a quarter of them access local news on their smartphones. Radio and social sites are also a popular destination for streamers to stay informed. These connected consumers are an engaged audience for local businesses, with an abundance of ways to be reached. Imagine combining information about a streamer who also watches local news programs, with intent to purchase at a local car dealership.

STREAMERS

NON-STREAMERS

52% 67%
Watch a local newscast on TV

17% 11%
Access local news on a computer

7% 4%
Access local news on a tablet

26% 14%
Access local news on a smartphone

ACCESS LOCAL NEWS ON SOCIAL SITES

38%

25%

LISTEN TO LOCAL OR INTERNET RADIO

34%

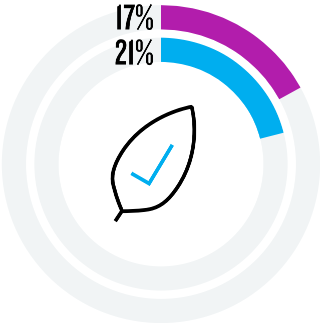
19%

ACCESSED WEATHER ON A DEVICE

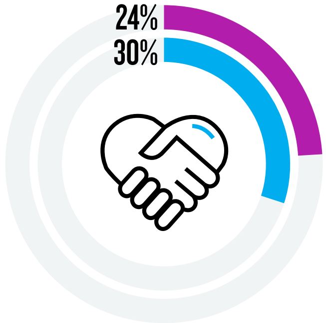
69%

47%

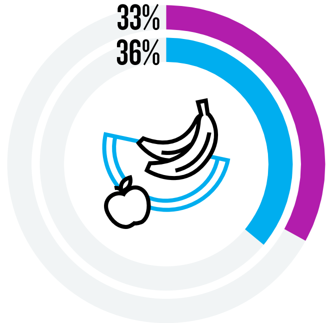
PARTICIPATE IN ENERGY-SAVING THROUGH UTILITY COMPANY



HAVE DONE VOLUNTEER WORK



BUY LOCALLY GROWN FOOD



Source: Nielsen Scarborough, USA+ R2 2018.
Streamer = HH that streamed content to their TV set: Yes. Non-Streamer = HH that streamed content to their TV set: No.

SUPPLEMENTAL DATA & SOURCING

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

STREAMING DEVICE PENETRATION IN LPM MARKETS

TOTAL HOUSEHOLDS, MAY 2017-2019

MARKET	2017	2018	2019
ATLANTA	57%	65%	74%
BALTIMORE	52%	59%	65%
BOSTON	58%	60%	65%
CHARLOTTE	52%	59%	63%
CHICAGO	56%	66%	70%
CLEVELAND	49%	59%	67%
DALLAS	57%	63%	71%
DENVER	55%	63%	70%
DETROIT	50%	60%	66%
HOUSTON	53%	65%	70%
LOS ANGELES	61%	71%	74%
MIAMI	53%	64%	67%
MINNEAPOLIS	51%	58%	66%
NEW YORK	59%	67%	73%
ORLANDO	58%	66%	71%
PHILADELPHIA	54%	59%	67%
PHOENIX	56%	62%	68%
PITTSBURGH	45%	50%	56%
PORTLAND	56%	60%	64%
SACRAMENTO	56%	67%	67%
SAN FRANCISCO	61%	68%	74%
SEATTLE	58%	64%	74%
ST. LOUIS	49%	60%	62%
TAMPA	53%	64%	67%
WASHINGTON, DC	58%	66%	72%

Source: Nielsen NPOWER. Total Households. Streaming device includes an internet enabled Smart TV or Internet Connected Device (Roku, Google Chromecast, Amazon Fire TV, etc.). Based on average install counts for the 15th day of May. Based on all installed homes in panel, including Broadband Only (BBO).

STREAMING DEVICE PENETRATION IN SET METER MARKETS

TOTAL HOUSEHOLDS, MAY 2017-2019

MARKET	2017	2018	2019
ALBUQUERQUE	47%	55%	59%
AUSTIN	54%	63%	74%
BIRMINGHAM	36%	48%	57%
BUFFALO	45%	55%	59%
CINCINNATI	53%	61%	69%
COLUMBUS, OH	54%	61%	65%
DAYTON	48%	58%	63%
FT. MYERS	51%	59%	66%
GREENSBORO	40%	50%	60%
GREENVILLE	42%	52%	59%
HARTFORD	52%	61%	67%
INDIANAPOLIS	51%	58%	62%
JACKSONVILLE	50%	61%	70%
KANSAS CITY	52%	55%	62%
KNOXVILLE	45%	53%	56%
LAS VEGAS	55%	67%	67%
LOUISVILLE	41%	55%	61%
MEMPHIS	35%	48%	56%
MILWAUKEE	46%	56%	65%
NASHVILLE	45%	55%	66%
NEW ORLEANS	47%	59%	64%
NORFOLK	56%	66%	69%
OKLAHOMA CITY	46%	54%	63%
PROVIDENCE	51%	59%	64%
RALEIGH	54%	59%	67%
RICHMOND	47%	53%	58%
SALT LAKE CITY	57%	66%	74%
SAN ANTONIO	48%	62%	66%
SAN DIEGO	65%	68%	73%
TULSA	41%	51%	59%
WEST PALM BEACH	50%	61%	66%

Source: Nielsen NPOWER. Total Households. Streaming device includes an internet enabled Smart TV or Internet Connected Device (Roku, Google Chromecast, Amazon Fire TV, etc.). Based on average install counts for the 15th day of May. Based on all installed homes in panel, including Broadband Only (BBO).

REACH AND TIME SPENT STREAMING IN LPM MARKETS

ADULTS WHO STREAM TO THE TV SET, MAY 2019

MARKET	HOW MANY AVG REACH (%)	HOW OFTEN AVG DAYS/MONTH	HOW LONG AVG HH:MM PER DAY
ATLANTA	58%	10	2:08
BALTIMORE	52%	10	1:52
BOSTON	53%	11	1:53
CHARLOTTE	53%	11	2:23
CHICAGO	58%	10	1:58
CLEVELAND	63%	11	2:29
DALLAS	58%	11	2:22
DENVER	57%	11	2:01
DETROIT	55%	10	1:54
HOUSTON	59%	10	2:02
LOS ANGELES	60%	11	2:02
MIAMI	55%	10	2:07
MINNEAPOLIS	59%	11	1:52
NEW YORK	59%	10	1:58
ORLANDO	61%	12	2:26
PHILADELPHIA	50%	10	2:05
PHOENIX	60%	12	2:11
PITTSBURGH	45%	10	1:54
PORTLAND	55%	11	1:47
SACRAMENTO	58%	11	1:53
SAN FRANCISCO	59%	10	1:46
SEATTLE	61%	11	1:58
ST. LOUIS	53%	11	1:56
TAMPA	61%	11	2:02
WASHINGTON, DC	58%	11	2:01

Source: Nielsen NPOWER. May 2019 local survey (April 25 – May 22, 2019). Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Based on all installed homes in panel, including Broadband Only (BBO).

REACH AND TIME SPENT STREAMING IN SET METER MARKETS

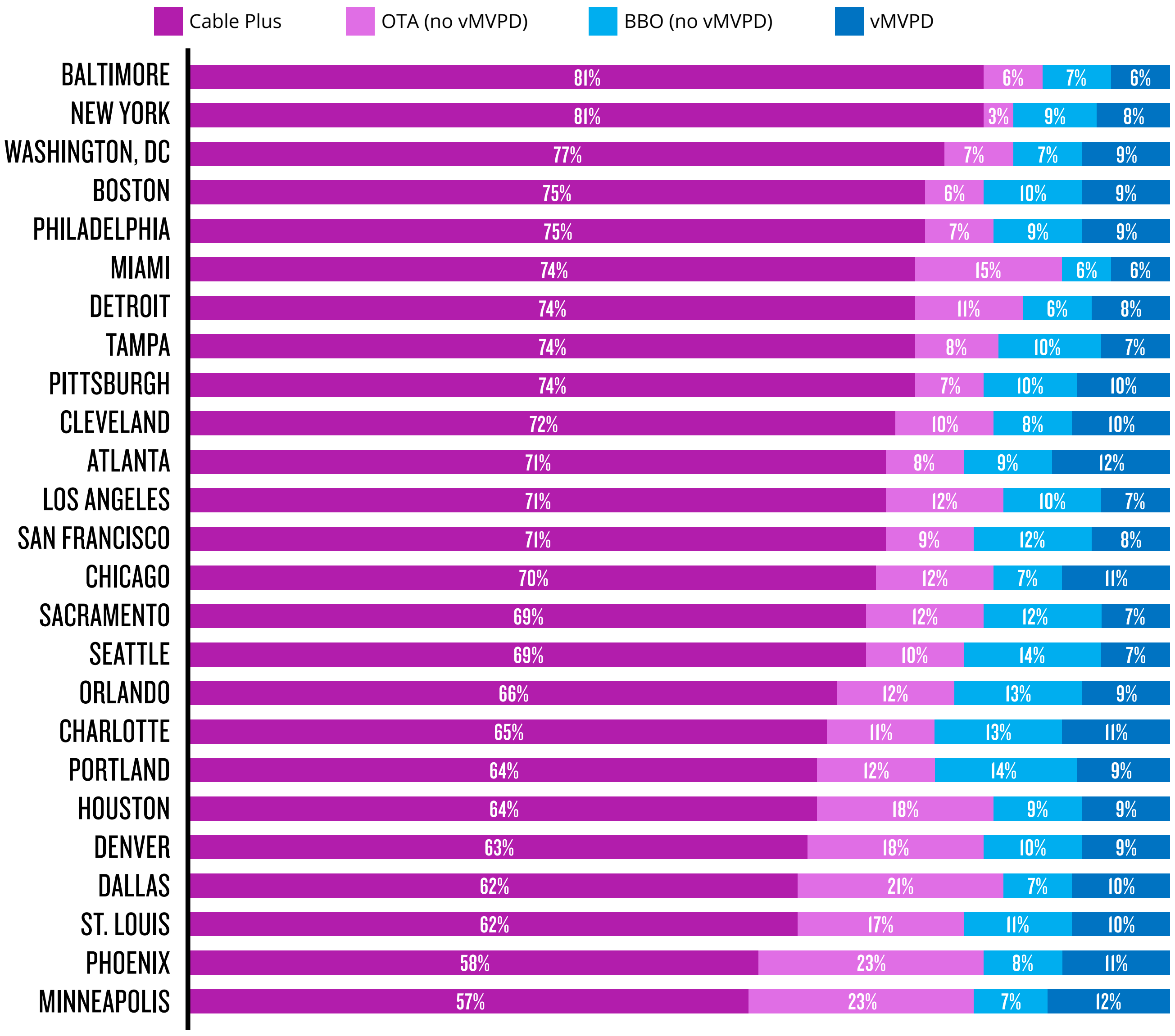
ADULTS WHO STREAM TO THE TV SET, MAY 2019

MARKET	HOW MANY AVG REACH (%)	HOW OFTEN AVG DAYS/MONTH	HOW LONG AVG HH:MM PER DAY
ALBUQUERQUE	54%	12	2:08
AUSTIN	70%	12	1:50
BIRMINGHAM	51%	11	1:59
BUFFALO	54%	11	1:55
CINCINNATI	67%	10	1:48
COLUMBUS, OH	61%	11	1:45
DAYTON	61%	12	1:49
FT. MYERS	63%	12	1:35
GREENSBORO	55%	12	1:55
GREENVILLE	55%	10	2:06
HARTFORD	59%	11	1:41
INDIANAPOLIS	59%	11	1:55
JACKSONVILE	63%	11	1:36
KANSAS CITY	54%	11	1:48
KNOXVILLE	50%	11	1:41
LAS VEGAS	64%	11	2:01
LOUISVILLE	56%	10	1:47
MEMPHIS	50%	11	2:04
MILWAUKEE	64%	11	1:47
NASHVILLE	61%	11	1:55
NEW ORLEANS	57%	11	1:56
NORFOLK	64%	11	1:48
OKLAHOMA CITY	58%	11	1:53
PROVIDENCE	58%	11	1:40
RALEIGH	64%	11	2:00
RICHMOND	51%	10	1:52
SALT LAKE CITY	66%	12	1:30
SAN ANTONIO	64%	10	1:53
SAN DIEGO	66%	10	1:35
TULSA	53%	10	1:55
WEST PALM BEACH	58%	11	1:31

Source: Nielsen NPOWER. May 2019 local survey (April 25 – May 22, 2019). Streaming includes viewing of at least one minute through an Internet Connected Device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Any streaming done on a video game console is excluded. Based on all installed homes in panel, including Broadband Only (BBO).

SERVICE PROVIDER STATUS IN LPM MARKETS

ADULTS WHO STREAM TO THE TV SET, MAY 2019

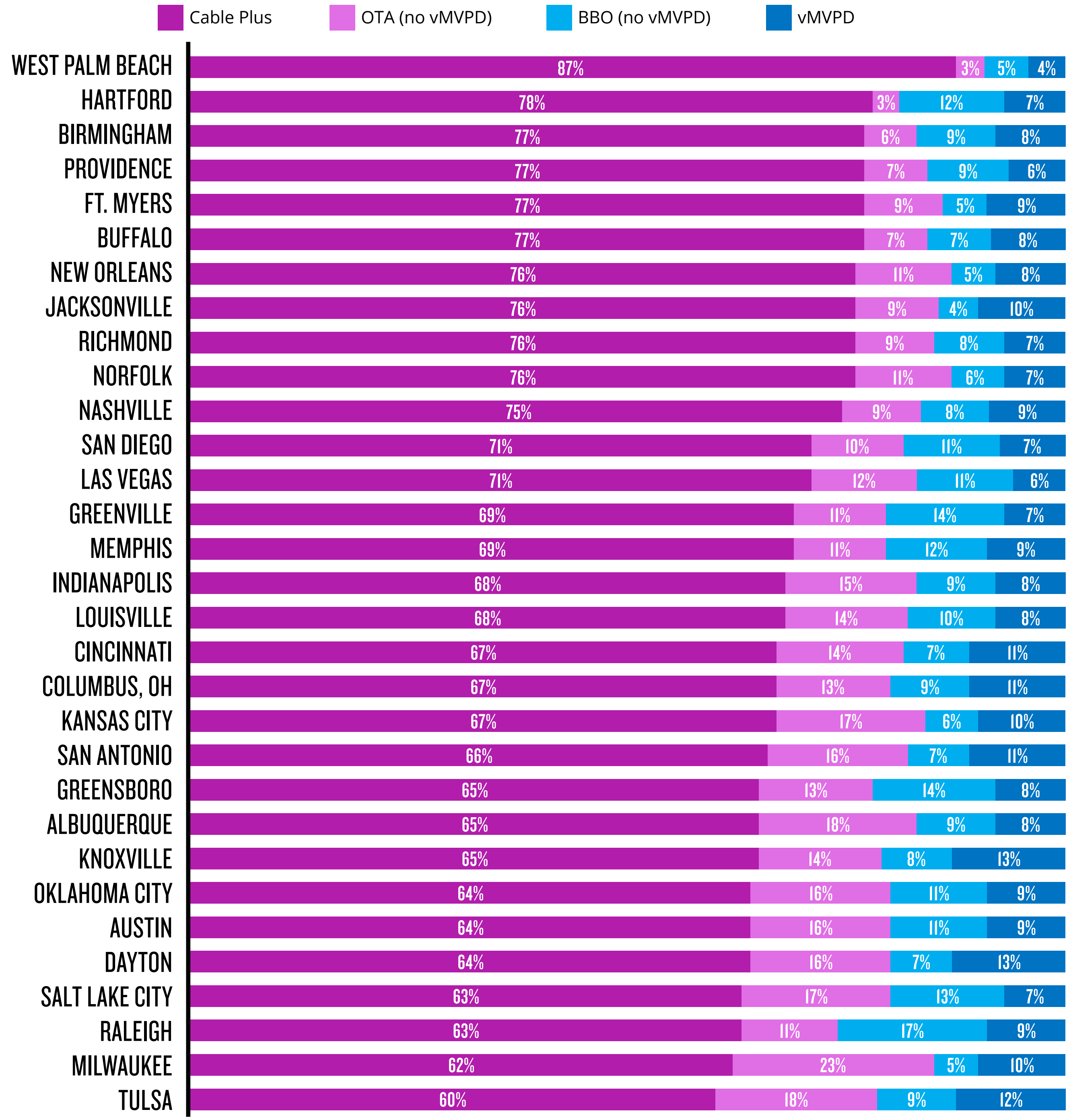


Read as: 81% of Streaming Adults in Baltimore live in a Cable Plus household.

Source: Nielsen NPOWER. Streaming Adults 18+. May 2019. Streaming includes viewing of at least one minute through an Internet Connected device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Cable Plus group includes wired cable, satellite and ADS homes. Broadband Only homes do not have Over-the-Air or Traditional cable. Cable Plus, OTA and BBO groups exclude homes that also subscribe to a vMVPD.

SERVICE PROVIDER STATUS IN SET METER MARKETS

ADULTS WHO STREAM TO THE TV SET, MAY 2019



Read as: 87% of Streaming Adults in West Palm Beach live in a Cable Plus household.

Source: Nielsen NPOWER. Streaming Adults 18+. May 2019. Streaming includes viewing of at least one minute through an Internet Connected device (Roku, Google Chromecast, Amazon Fire, etc.) or via app/web on a Smart TV. Cable Plus group includes wired cable, satellite and ADS homes. Broadband Only homes do not have Over-the-Air or Traditional cable. Cable Plus, OTA and BBO groups exclude homes that also subscribe to a vMVPD.

SOURCING & METHODOLOGY

STREAMING METHODOLOGY

TV Streamers describes the universe of adults 18+ who were exposed to at least one minute of non-linear content via an Internet Connected Device or app/web usage on a Smart TV during May 2019. Internet Connected Device usage 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. Non-linear usage includes TV viewing to non-traditional programming Subscription Video On-Demand (SVOD) providers and other non-traditional sources that are not encoded with audio signatures which enable Nielsen to properly credit to the originating program/network.

DEFINITION OF HOW MANY, HOW OFTEN HOW LONG (PAGES 6-8)

How Many is the number of adults who streamed to their TV set during May 2019. How Often is expressed as the number of days that those individuals streamed during the month. How Long is a measure of the time spent streaming to the TV set per usage session. This is displayed as daily hours: minutes.

TELEVISION METHODOLOGY (PAGE 10)

Cable viewing includes live viewing to ad supported or all other cable sources including premium pay. Broadcast viewing is a combination of the four major affiliates (ABC, NBC, CBS, FOX), The CW Network, Independents and PBS affiliates. DVR/Time-shifted TV is playback primarily on a DVR but includes playback from video on demand, DVD recorders, server based DVRs and services like Start Over. TV-connected devices (DVD, Game Console, Internet Connected Device) includes when these devices are in use for any purpose, not just for accessing media content. Game Consoles include when the game console is being used to play video games or stream content to the TV. Internet Connected Device usage 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 and app/web usage on a Smart TV.

SCARBOROUGH METHODOLOGY (PAGE 15)

Survey data based on Households that streamed content to their TV set. Non-Streamers includes adults that did not report streaming to their TV set. Data is based on Release 2 of the 2018 national USA+ survey period. Nielsen Scarborough has been measuring media, retail and lifestyle habits on a national and local level for more than 40 years. Each year, Scarborough surveys over 200,000 individuals across the U.S.. Survey methodologies vary by local market with measurement tactics including phone interviews, survey booklets, television diaries and internet surveys.

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, DC.

SET METER

31 mid-size markets that provide tuning information on a daily basis. Viewer assignment provides demographic information about who is watching.

Markets: Albuquerque, Austin, Birmingham, Buffalo, Cincinnati, Columbus, OH, 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

15 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, SC, Flint, Fresno, Grand Rapids, Honolulu, Harrisburg, Madison, Mobile-Pensacola, Paducah, Reno, Santa Barbara, Traverse City, Tucson, Yakima

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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