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# CULTURAL CONNECTIVITY TRANSFORMED

HOW LATINOS ARE CONNECTING WHILE SOCIAL DISTANCING

The Hispanic Diverse Intelligence Series 2020

A COVID-19 IMPACT SPECIAL REPORT





# FOREWORD

It's hard to believe that we're merely past the midpoint of 2020—one of the most trying and turbulent years for the U.S. Latino community. Looking back, 2020 started as another in a series of auspicious years. Shakira and JLo made history as the first two Latinas to headline one of television's biggest events, Super Bowl LIV. Together with Latin superstars J.Balvin and Bad Bunny, they delivered a performance for 100 million viewers that celebrated Latin culture in the most American of contexts. Latinos turned to social channels to share and continue the conversation around Latino identity. In fact, social posts from the four Latino artists drove 7 million social engagements—16% of the total social activity for Super Bowl LIV.

That performance was just one example highlighting the upward trajectory of the Hispanic community over the past decade. The momentum has spanned well beyond entertainment to include wealth building, educational attainment and greater representation and visibility of Latinos and Latino culture in media.

Then, in March 2020, the novel coronavirus (COVID-19) outbreak began to alter life in the U.S. for everyone, threatening to compromise the significant gains the Hispanic community had realized. As many regions shut down, the Hispanic community immediately started to feel the impacts of job loss, disproportionate healthcare access and strain on their in-person social networks.

Hispanics are a collectivist culture, placing strong value on the needs of the community as a whole. Social networks in the Latino community represent the links, shared values and understanding that enable the community to build trust, grow and work together. This creates a distinct way the community engages, shares, and informs both inside and outside of it. It is through these constructed social networks that bonding through shared experiences—even across countries of origin—results in a shared U.S. experience.

As COVID-19 spread, the subsequent social distancing measures, quarantines and shut downs, threatened the ability for Latinos to engage in face-to-face connections. Hispanics rely upon these trusted and hard-won networks as conduits of information, underscoring the interdependence of collectivism and social networks. These networks serve more than just a social appetite, they serve as the conduit of trust, truth and cultural connection. During COVID, these networks and connections are a critical mechanism for Latinos to fill the void of in-person networking—by turning to trusted content channels like TV, radio and social media to inform and educate, communicate, share experiences and seek support.

The insights presented in this report will help you understand ways to continue building trust with the Hispanic community during these uncertain times and through the journey to recovery.



**Stacie M. de Armas**  
SVP, Diverse Insights & Initiatives

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# INTRODUCTION

The U.S. Hispanic population frequently makes headlines for its growth and for being a key contributor to the economy, labor force and the electorate. Contextually, it's crucial to understand the impending demographic revolution the U.S. is poised for and how the Latino community, in harmony with other minority groups, is the harbinger of that change.



TODAY, THERE ARE 62.3 MILLION HISPANICS MAKING UP 19% OF THE CURRENT U.S. POPULATION.



## THE DEMOGRAPHIC REVOLUTION

America is in the midst of a demographic revolution. As the population shifts toward new majorities, there has never been a more important time for the Latino community to come together. By working toward alignment within the community, celebrating our differences but focusing on our shared values and goals, we can show the resilience, strength, and contributions of Hispanics to the country.

The **Hispanic Star** represents Latino pride and empowerment. Driven by the firm belief that we don't win until we all win, the Hispanic Star is based on both a unifying symbol and a nonpartisan, inclusive, inspirational, and unifying footing in order for U.S. Hispanics to view themselves and help them act as a unified force for good.

The Hispanic Star supports opportunities and resources, like Nielsen's diverse intelligence reports, which expanded knowledge and understanding of this powerful community.



**HISPANIC STAR**

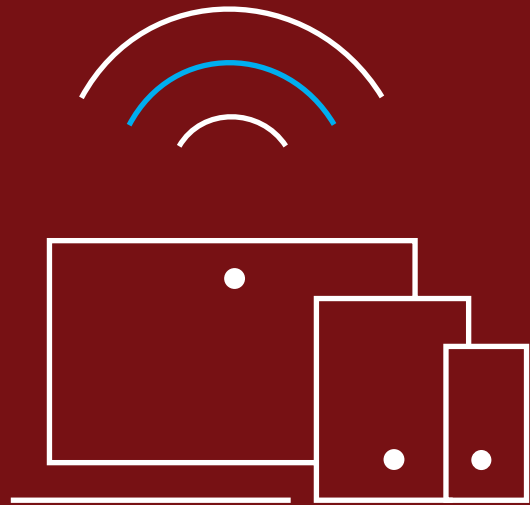


**Claudia Romo Edelman**  
Founder, We Are All Human





# STAYING CONNECTED THROUGH COVID-19



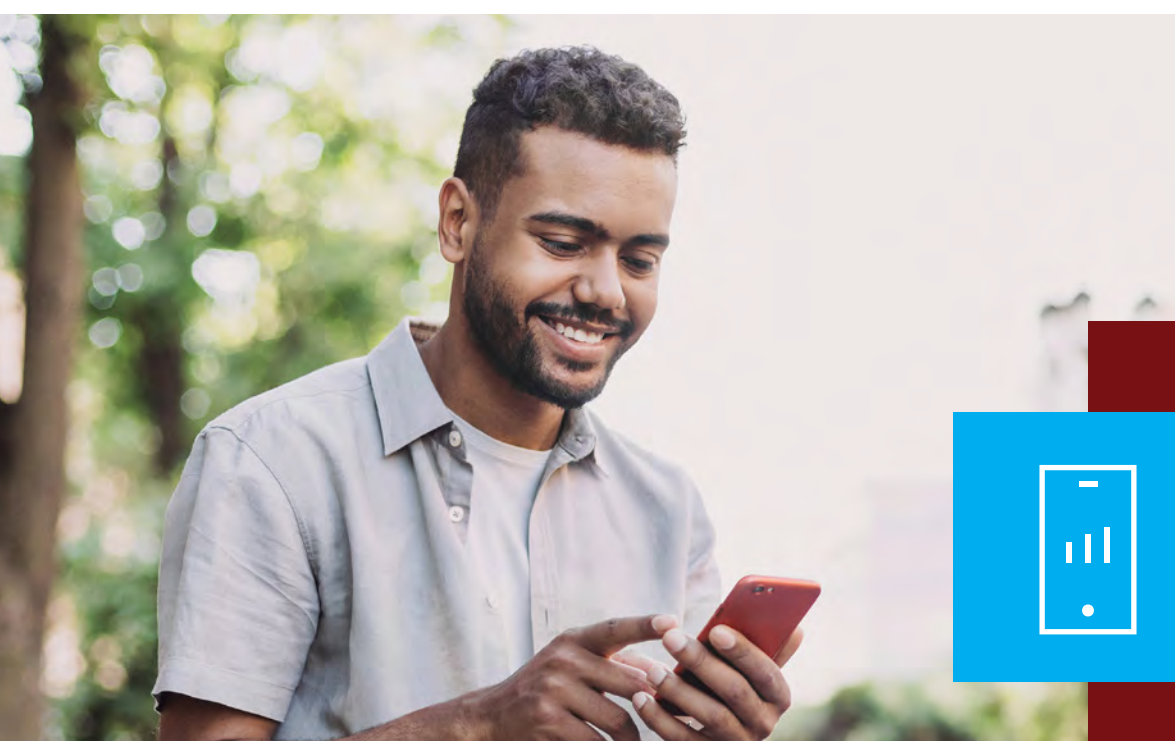
As COVID-19 news began to dominate our everyday lives, the Hispanic community quickly adapted the use of their connectivity tool of choice—the smartphone—to get news and information on the virus, health care advice and economic impact. While smartphones became a mainstay of connectivity for everyone, Latinos show a marked difference in use, time spent and app choice. With the erosion of physical contact and in-person networks, due to social distancing and quarantines, the Latino community more than ever before, used mobile devices as conduits for connecting with one another, trusted information networks and for content delivery.



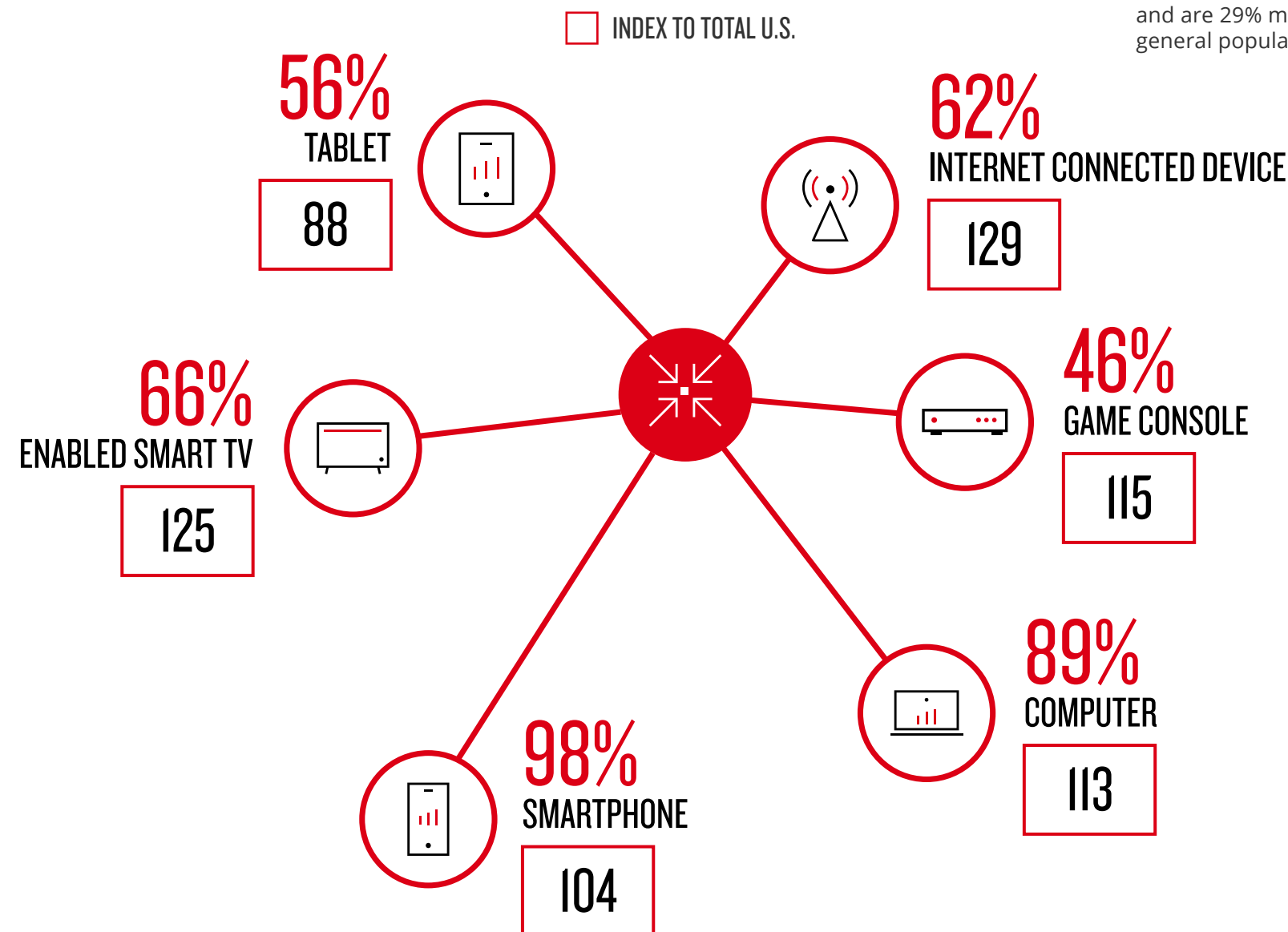


# SMARTPHONES

For Hispanics, who are heavily employed in essential and service jobs (e.g., front line workers in transit systems, hospitals, hotels, and agricultural industries), the smartphone became among the most important ways to connect with content and news while at work. The smartphone has long been a mainstay for Latinos who have over-indexed on ownership for many years. Today, 98% of Hispanics in the U.S. own a smartphone, compared with 93% among the general population. Latinos spend an average of over 30 hours per week on smartphones, more than any other device, including TV. When compared to the total population, Hispanics spent almost two more hours per week watching videos, streaming audio and social networking on their smartphones during COVID-19, as a way to bridge the social distancing gap.

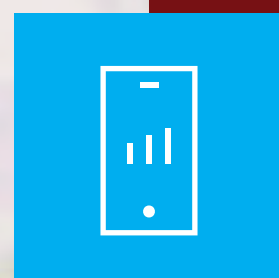


## DEVICE OWNERSHIP AMONG TOTAL HISPANICS



Read as: 62% of Hispanics own an internet connected device and are 29% more likely than the general population to own one.

Source: The Nielsen Total Audience Report, August 2020

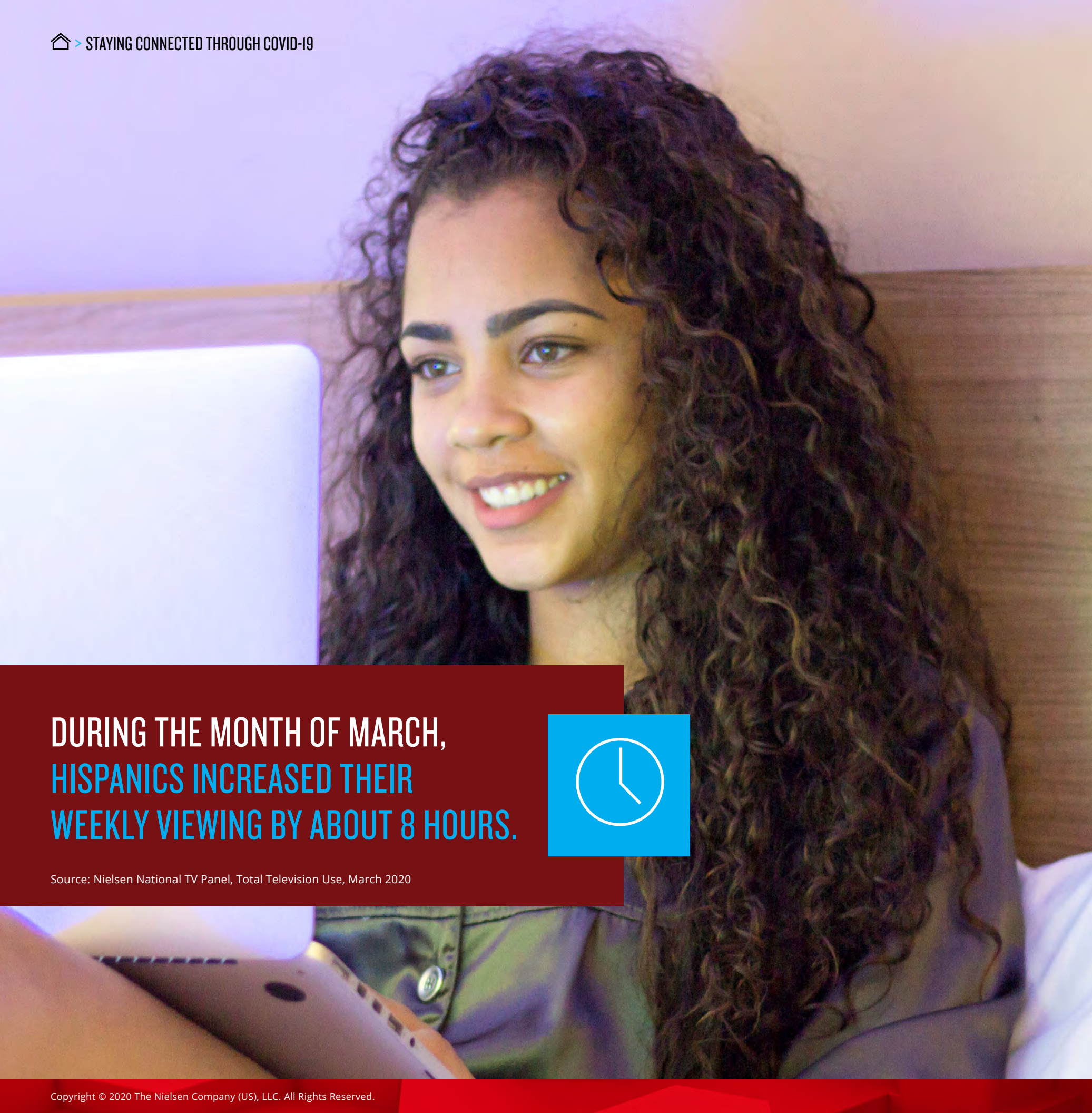


**98%**  
SMARTPHONE OWNERSHIP



**30+**  
HOURS PER WEEK ON SMARTPHONES

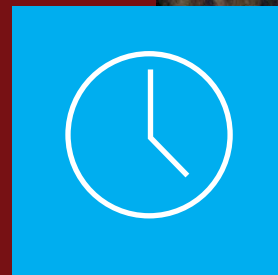




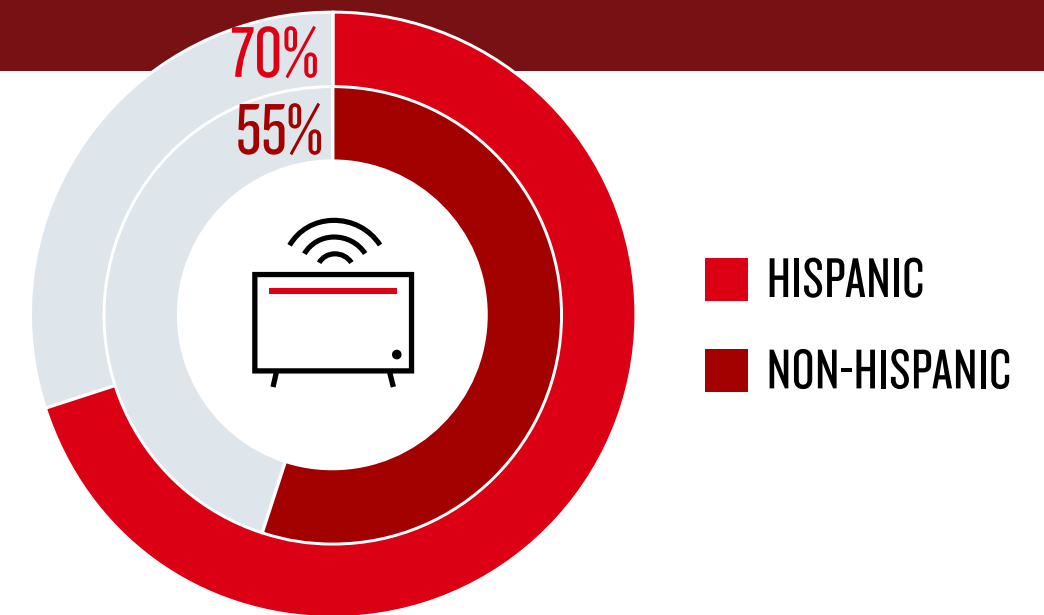
# STREAMING

AT THE ONSET OF COVID-19, 70% OF HISPANICS SAID THEY INCREASED THE AMOUNT OF TIME SPENT WATCHING MOVIES OR SHOWS USING A STREAMING SERVICE, WELL ABOVE THE 55% REPORTED BY NON-HISPANICS.

DURING THE MONTH OF MARCH, HISPANICS INCREASED THEIR WEEKLY VIEWING BY ABOUT 8 HOURS.



Source: Nielsen National TV Panel, Total Television Use, March 2020



Source: Online survey -Nielsen Scarborough Recontact Panel via Wizer's Adaptive Consumer Insights platform

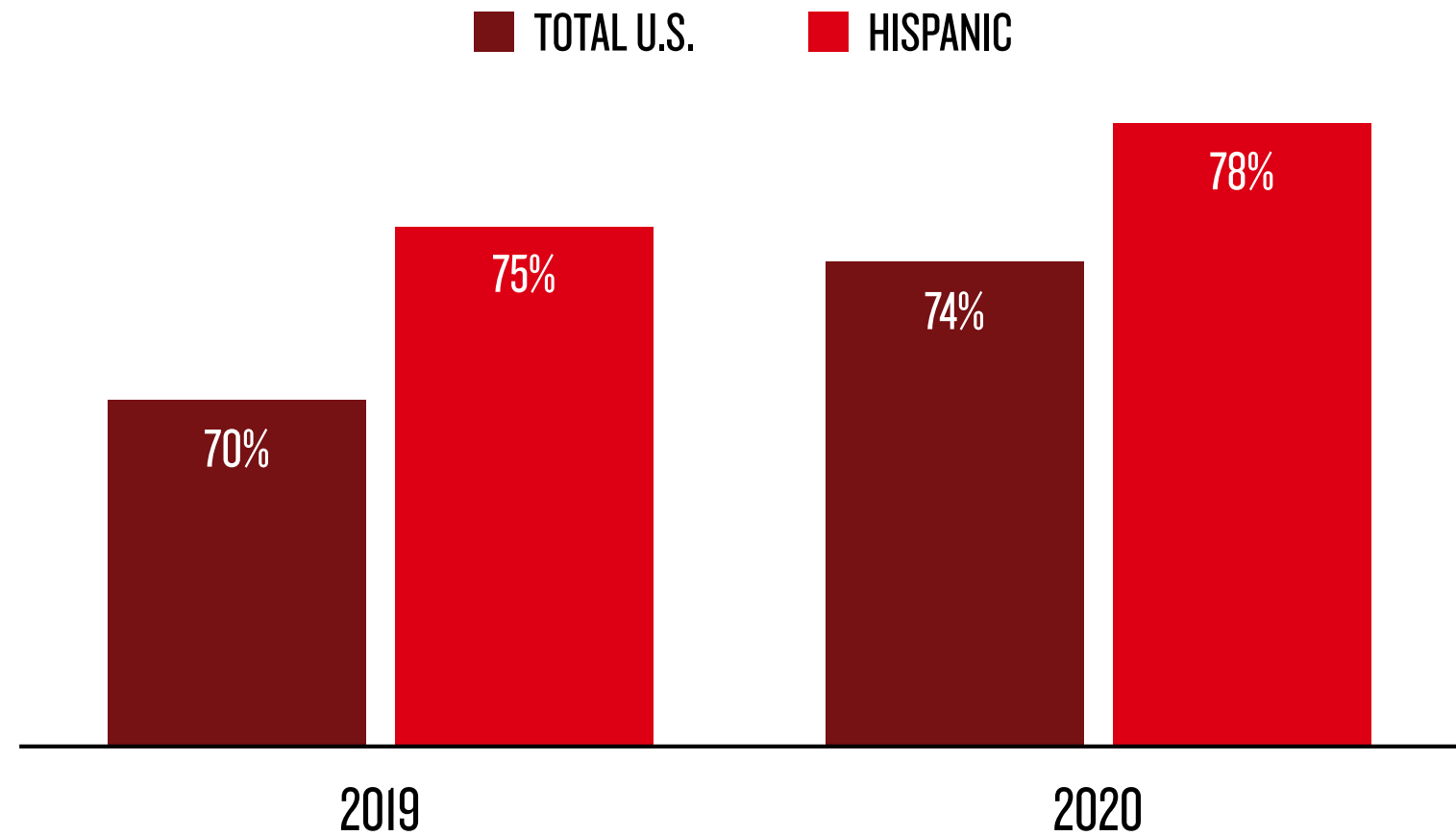


# STREAMING

Finding relevant content that speaks authentically to Latinos has never been easier, even during the pandemic. Seventy-eight percent of Hispanic households have at least one subscription video on demand (SVOD) subscription, compared with 74% of the total U.S. population.

Netflix is the top streaming provider used by Hispanics, with increased investment in Spanish programming and the availability of content curated for Latinos. In addition, there are more Hispanics relative to the total U.S. population who subscribe to the new Disney+ service, reflecting the higher number of Hispanic children in the household.

% U.S. HOUSEHOLDS WITH STREAMING SERVICE 2019–2020



Source: NPOWER - National TV Sample July 2020

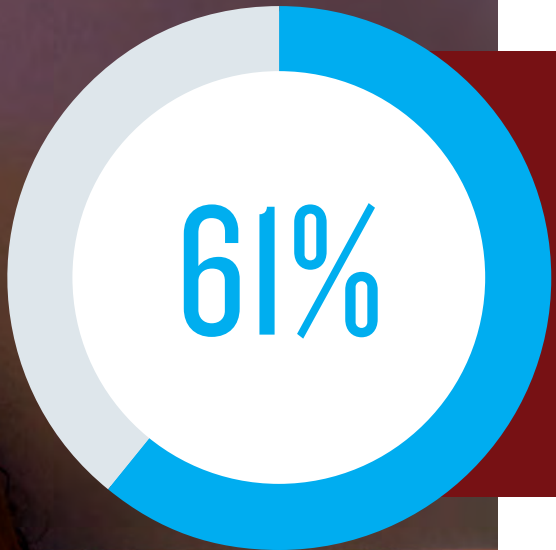
## TOP STREAMING SERVICES USED MONTHLY: SELF REPORTED

|                     | TOTAL U.S. | HISPANICS |
|---------------------|------------|-----------|
| NETFLIX             | 76%        | 81%       |
| AMAZON PRIME VIDEO  | 56%        | 54%       |
| HULU / HULU LIVE TV | 47%        | 45%       |
| DISNEY+             | 42%        | 50%       |

Source: MediaTech Trender Q1 2020







# NEWS AND TRUST

**OF HISPANICS SAY THEY ARE WATCHING MORE NEWS**



**HOWEVER, ONLY 20% OF ALL HISPANICS SAY CABLE TV NEWS IS TRUSTWORTHY, AND 18% SAY IT IS ACCURATE.**

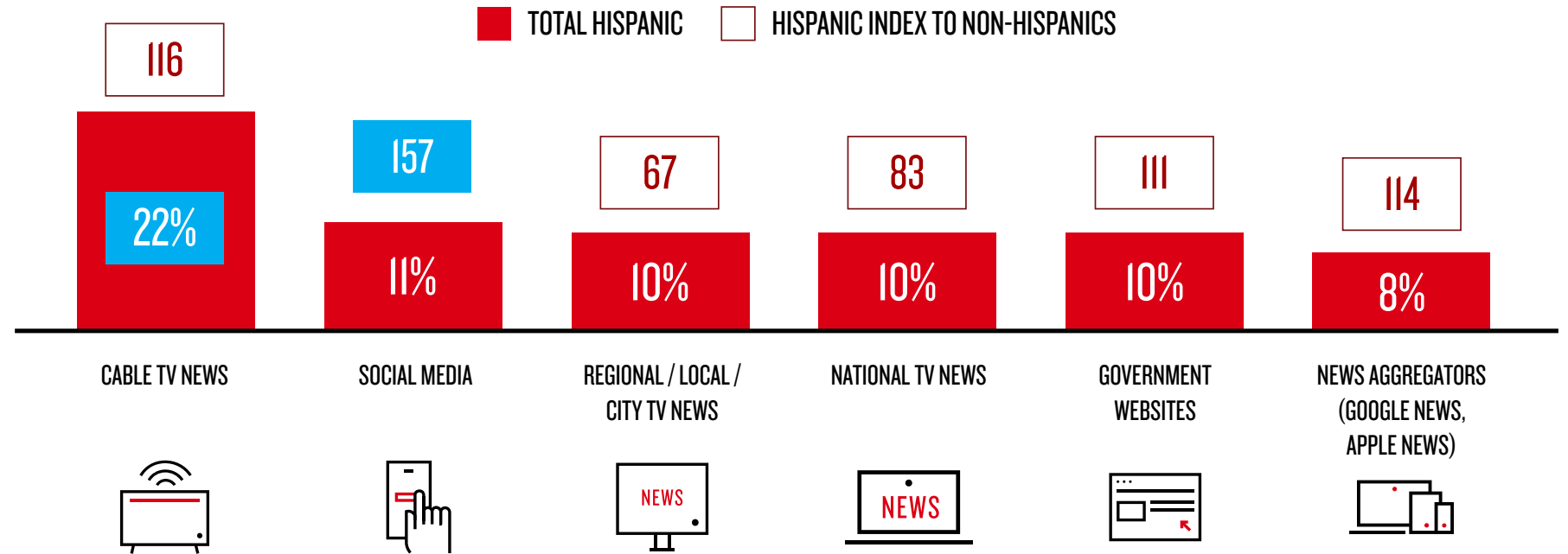
Source: Scarborough Recontact Survey  
Source: Nielsen COVID-19 Impact Study, March/April 2020



# NEWS AND TRUST

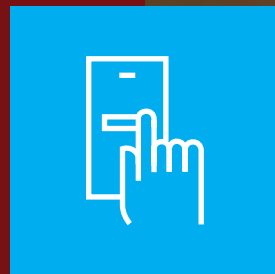
News trustworthiness is paramount. Polarizing views and conflicting health guidance among other things, make it difficult to decide who to listen to and what to believe. 86% of Latinos say that having factual information is a concern. So where does the community turn to for information? Hispanics are increasingly connecting with their trusted networks through social media to gain insight. Compared with non-Hispanics, Latinos are 57% more likely to use social media as a primary source of information about the coronavirus. And Latinos are actively dialoguing about what they learn within their trusted circles on social media.

## PRIMARY NEWS SOURCES FOR CORONAVIRUS INFORMATION



Source: Scarborough Recontact Survey  
Source: Nielsen COVID-19 Impact Study, March/April 2020

**LATINOS ARE 57% MORE LIKELY TO USE SOCIAL MEDIA AS A PRIMARY SOURCE OF INFORMATION ABOUT THE CORONAVIRUS.**

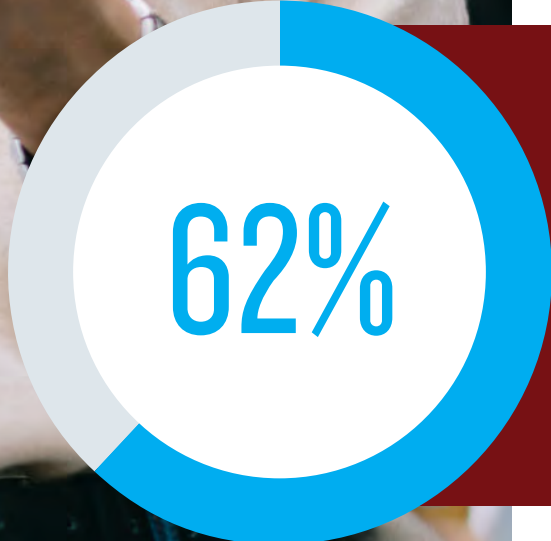
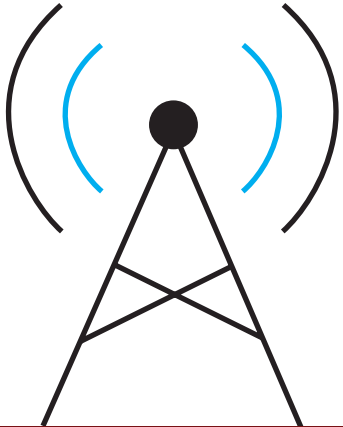






# RADIO

Radio has always played a unique role within the Latino community beyond entertainment. It serves as a trusted conduit of culturally relevant information on matters at home and abroad, which underscores why Latinos consistently turned to trusted radio personalities for information updates on COVID.



**OF HISPANICS SAY RADIO IS A GOOD SOURCE OF INFORMATION DURING COVID-19**

Source: Scarborough Recontact Survey  
Source: Nielsen COVID-19 Impact Study, March/April 2020



# RADIO

## RADIO IS TRUSTED IN TIMES OF CRISIS

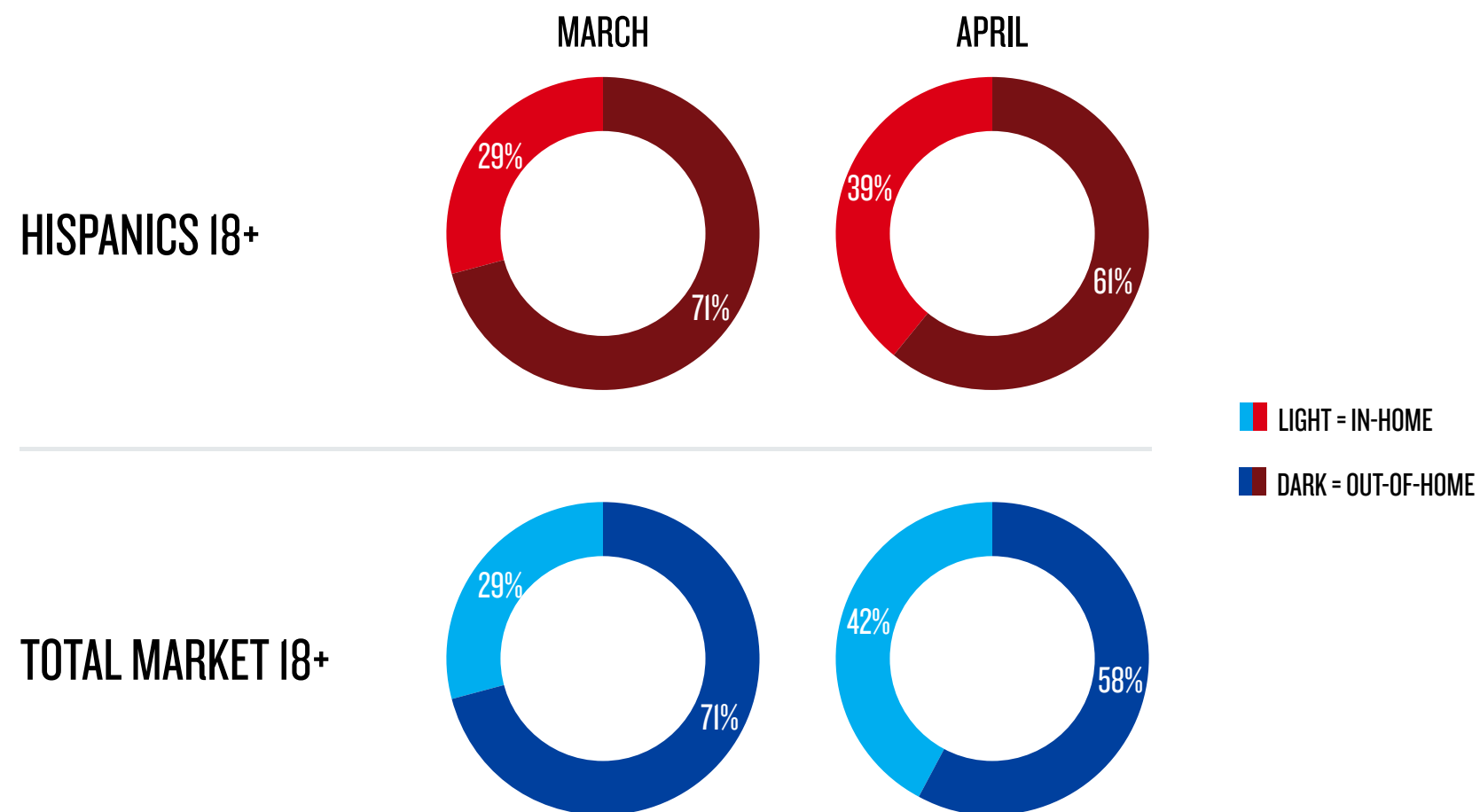
During COVID-19, in-home radio listening increased for Hispanics from 29% in March to 39% in April. While listening out-of-home tapered off during the onset of COVID-19, the decrease in out-of-home listening among Hispanics was smaller than the total market.

Whether they were essential workers or social distancing at home, 43% of Hispanics said that their favorite radio host made them feel less concerned and panicked and 42% said their radio host made them feel less alone.



## SHARE OF LISTENING IN AND OUT OF HOME DURING COVID-19 MONTHS

While all in home radio listening increased between March and April, Latino out of home listening stayed when compared to the total population likely as a result of Latinos increased probability of being employed in high risk or front line work.



Source: Nielsen March-May 2020 PPM / 45 Market Total / M-F 6a-7p / Hispanic and Total Persons 18+ / AQH Persons by Location



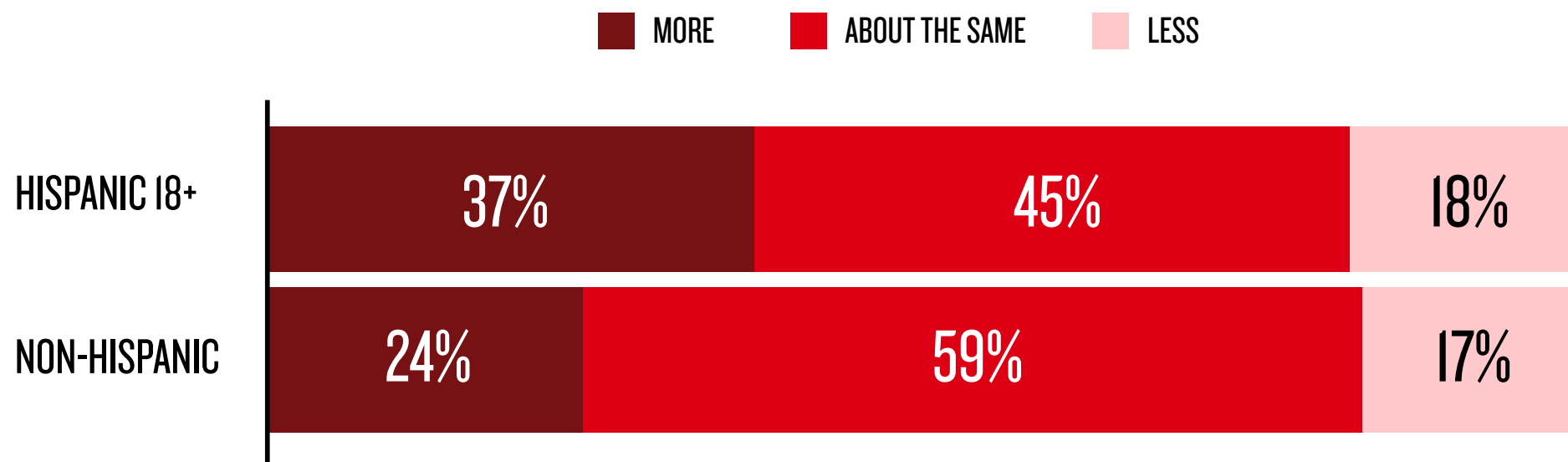
# TUNING IN TO STAY CONNECTED

More than one-third of Hispanics reported more time with radio as a result of COVID-19 (37%) compared with only 24% of White non-Hispanics. Another 48% of Latinos reported that listening to their favorite radio host helped them feel more informed and less stressed. Emphasizing the importance of community connections and cultural collectivism, a full 45% reported that listening to their favorite radio host during COVID-19 made them feel more connected to their community.

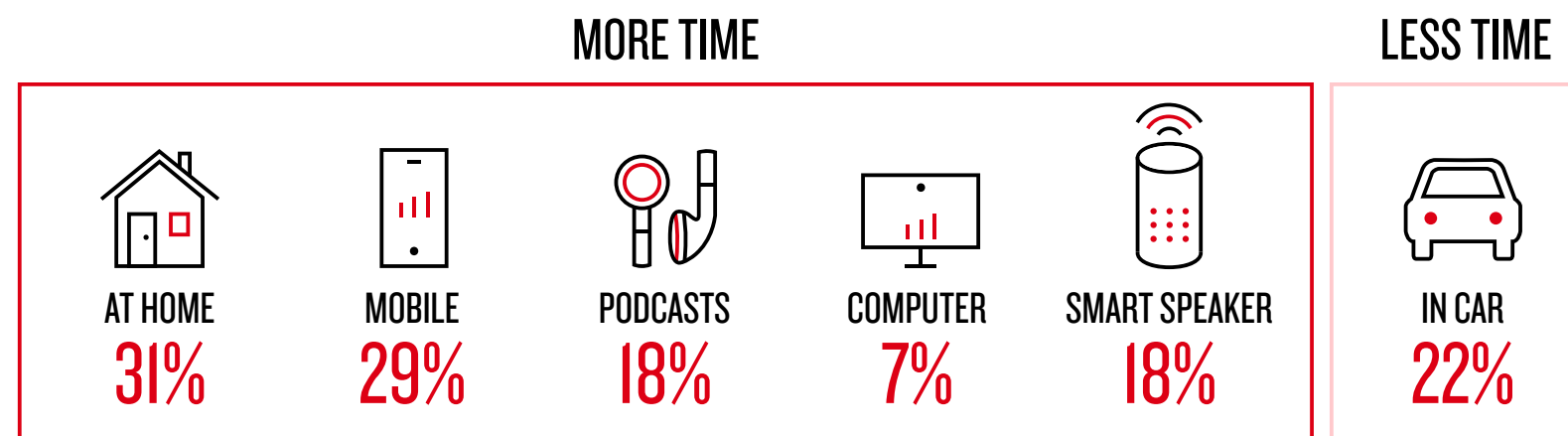


**36% OF LATINOS REPORTED THAT DURING THE CORONAVIRUS PANDEMIC THEY HAVE LOOKED FOR NEW WAYS TO LISTEN TO THEIR FAVORITE RADIO STATION/PERSONALITY/PROGRAM.**

## MORE THAN 1/3 OF HISPANICS REPORT MORE TIME WITH RADIO AS A RESULT OF COVID-19



### HISPANICS SPEND MORE TIME LISTENING



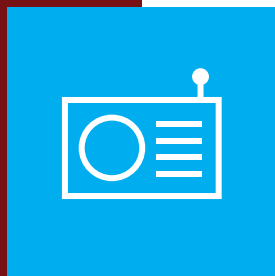
Source: Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+



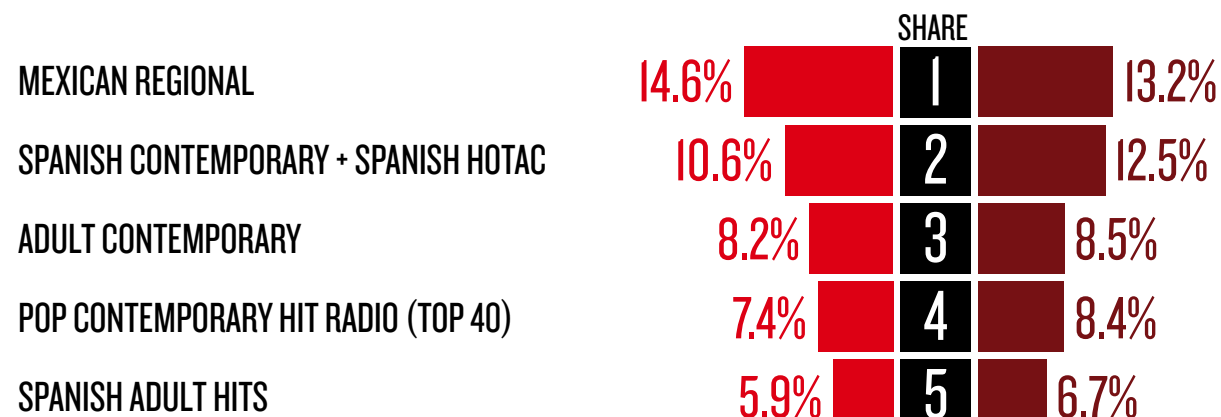
# TOP AUDIO GENRES DURING COVID

There are many formats and genres of music that the Latino community consumes, reflecting the Latinidad that crosses generations and celebrations. The close affinity Latinos have for radio was amplified during COVID.

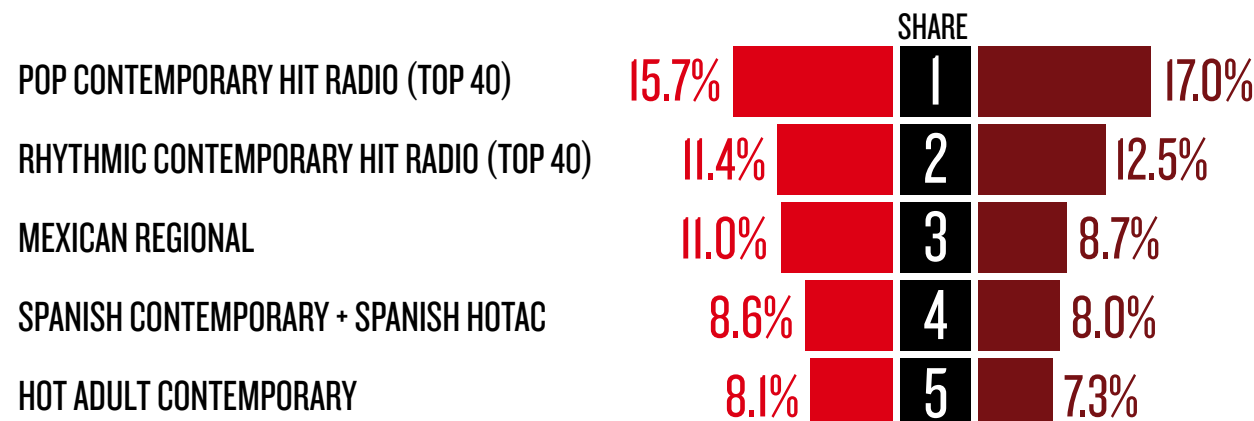
**HISPANICS SPEND OVER 12 HOURS A WEEK LISTENING TO THE RADIO, 33 MINUTES MORE THAN THE TOTAL MARKET.**



## HISPANIC ADULTS 18+



## HISPANIC TEENS 12-17



## TOTAL PERSONS 18+



## TOTAL TEENS 12-17



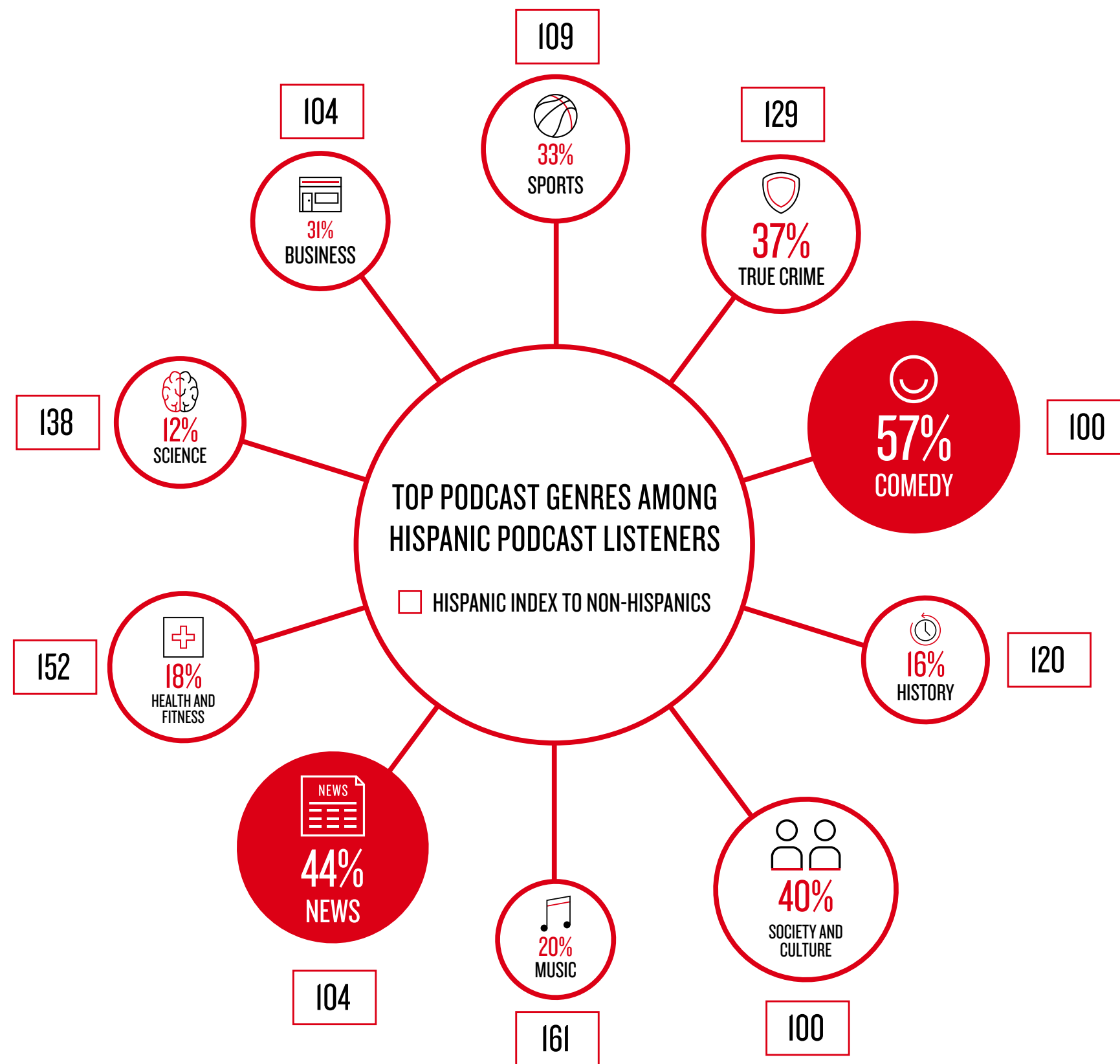
Source: RADAR 145 June 2020 + National Regional Database (NRD) Fall 2019 for 111 Hispanic DST Metros



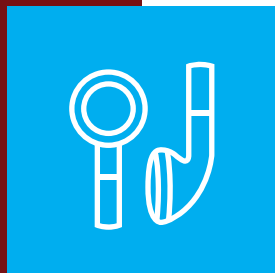
# PODCAST ENGAGEMENT TRENDS WITH COMMUTING AND DRIVING

As Latinos were more likely to be essential workers, COVID-19 gave Latinos more time to explore podcast genres. As podcasts gained in popularity early in the year, we see that they serve as a complement to busy Hispanics who want a different avenue for entertainment. Of podcast listeners, 16% of Hispanics listen to podcasts every day, over-indexing the average podcast listener by 9%. Among the top platforms used by Hispanics for podcast listening are YouTube at 49%, iTunes/Apple Podcasts at 34%, Spotify at 30%, AM/FM radio at 20% and Pandora at 18%.

Seeking a balance of news and entertainment, the most popular genre among Hispanic podcast listeners is comedy at 57%, followed by news at 44% and society and culture by 40%. More than the total population, they over-index the most on the preference of music-related podcasts by 61% and health and fitness by 52%.



**HISPANICS SPENT 18% MORE TIME LISTENING TO PODCASTS**



Source: Scarborough Podcast Recontact Study (Listeners Only) 2019 Release 2 Total (Jul 2018-Nov 2019); Custom Nielsen study conducted March 20-22 via an online survey, based on a weighted sample of 1000 adults 18+



# SHELTER FROM THE COVID-19 STORM: LATINO SOCIAL MEDIA ENGAGEMENT

As the pandemic drew on, Hispanic consumers were torn between two opposing realities, sheltering at home or in high risk work. The collectivist nature of Latinos led the community to turn to social media to engage and continue the dialogue around content consumed on TV and streaming. Nielsen Social Content Ratings shows that those who watched Spanish language primetime news and talk programming, turned to social media to continue the dialogue at a much higher rate than those who watched English language primetime news and talk programming.

Although there was a similar number of shows airing in the category and time period from 2019 to 2020, we see a 71% increase in social media activity around Spanish language primetime news and talk vs. the year prior. Social media activity around English language primetime news and talk only increased by 17%.



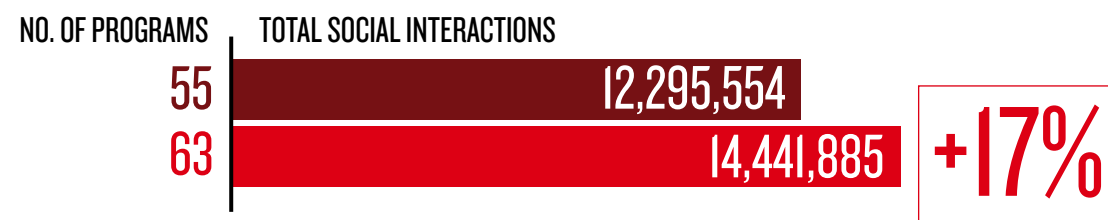
## VOLUME OF SOCIAL TV ACTIVITY: SPRING 2019 VS. SPRING 2020

■ 3/1/19 - 4/15/19    ■ 3/1/20 - 4/15/20

### SPANISH-LANGUAGE TALK & NEWS



### ALL DAYPARTS TALK & NEWS



Source: Nielsen Social Content Ratings March 1 - April 15, 2019 vs. March 1 - April 15, 2020.

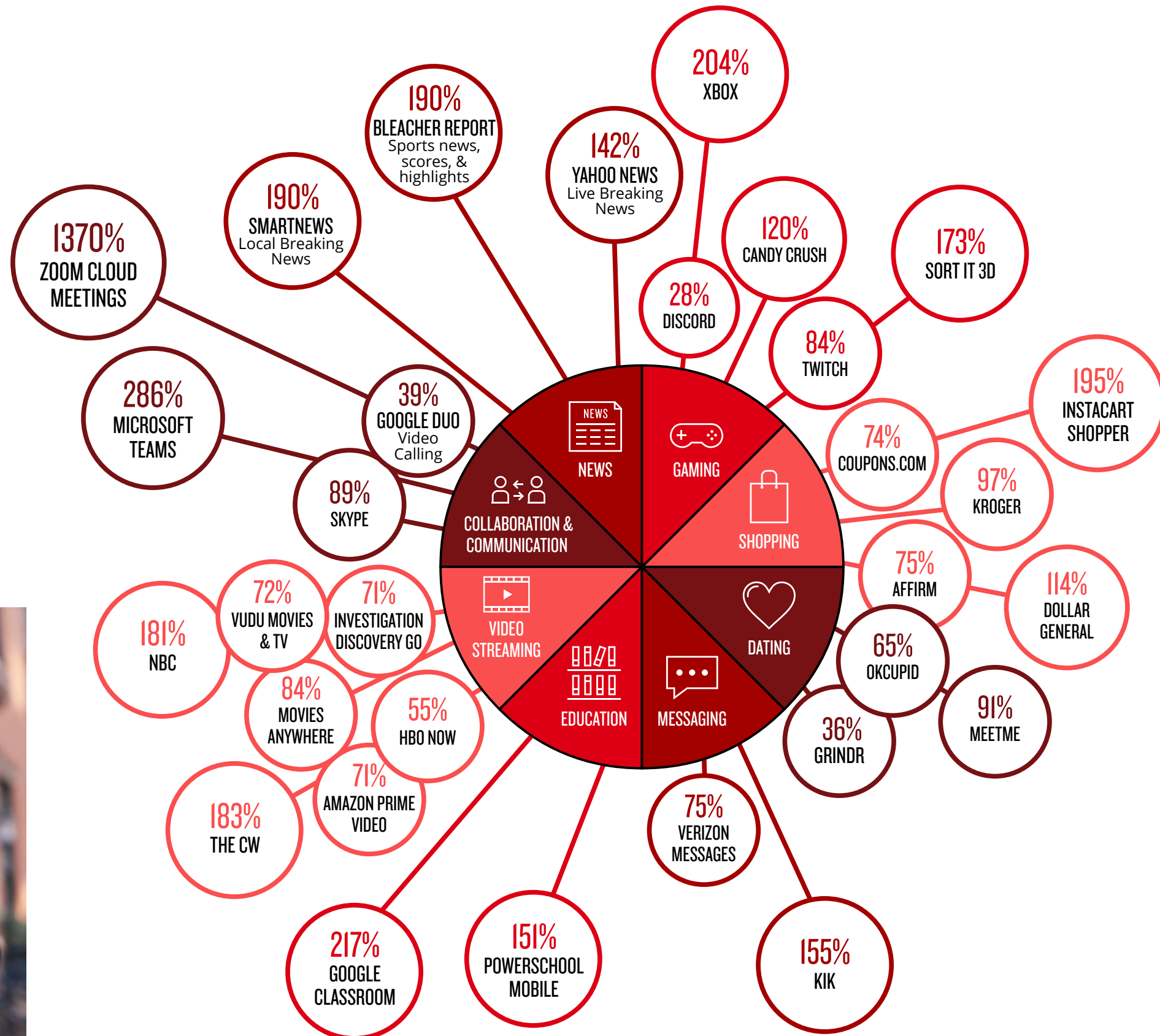


# APP REACH WENT UP IN KEY CATEGORIES

As Latinos continued to cope with the impact of the coronavirus outbreak, mobile app downloads, and time spent with apps skyrocketed. The growth in app reach has largely been fueled not by use of existing apps, but by use of new apps to bridge the social gap introduced with social distancing and lockdowns. While much of the activity taking place on mobile devices during the pandemic is related to entertainment like video watching, music streaming or gaming, Latinos used apps for connectivity, such as dating, collaboration and messaging apps at a greater rate than the total population.



## TOP APP REACH % CHANGE HISPANICS 18+ FEBRUARY TO APRIL 2020



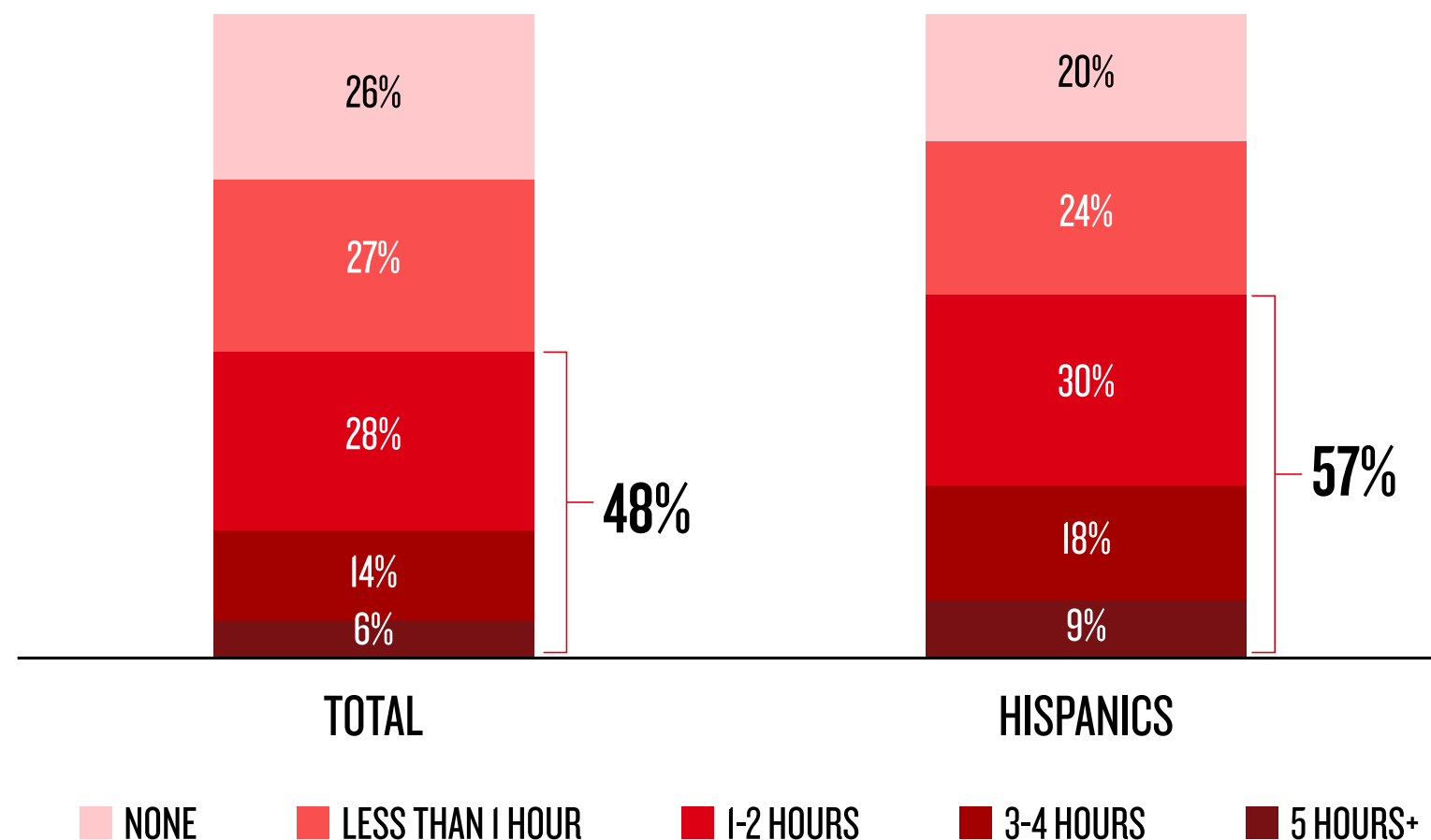
Source: Nielsen Media Impact 4/1/20 - 4/30/20 (Total Universe 18+)

# USING SOCIAL NETWORKS FOR SOCIAL JUSTICE

Social media has played an outsized role in the social and political lives of Latinos. The community has used social media to amplify messages to advocate for an accurate count in Census 2020, to balance a challenging political dialogue of anti-immigration and border separations, and DACA recipients and for the fight for racial justice. For many in the Latino community, Black Lives Matter protests and social justice marches felt familiar, as they echoed the civil rights struggles of the 1960s including the farmworker equity struggles led by Cesar Chavez, and the recent protests taking place all over Latin America. Latinos across the country mobilized and joined Black Lives Matter protests and marches in solidarity for social justice and equity, turning to social networks where they spend more time than the total population, with 57% spending more than one hour per day and 27% spending 3 hours or more compared with just 48% and 20%, respectively, for the total population.



HOURS SPENT SOCIAL NETWORKING IN AVERAGE DAY



Source: Nielsen Scarborough USA+ Release 2, 2019



# Q&A WITH LIZZA MONET MORALES



## What's changed during COVID-19?

I focused even further on creating a hub of positivity, fun and resources for community that would help me #spreadlove. A few years back I started #LoveInAction projects — all about paying it forward in creative ways. For example, my community raised money for a water well in Africa, members of my community and I laid down concrete for homes in a small town in Cuba so they could have actual floors and protect their furniture during mud season.

## How is our community responding during this time of uncertainty?

Authenticity more than ever is what our community is craving. The more you can show that in your photos, videos and captions, the more you can be of service. And the more you can be of service, the stronger your connection will be with your community. Like my wise Abuelita always said, "True richness of the soul comes when you choose experiences over things, invest in your education and lead your life by being of service to others."

It's become very clear who talks about being the change and who's walking the walk to BE THE CHANGE online and off. As a result, it has made many of them look at what type of content they are consuming AND sharing amongst friends and family. It has also impacted who they choose to follow and unfollow during this time.

## Tell us more about how you're driving social justice.

Earlier this year, I officially launched WFHN-TV, built by creatives, for creatives, to stay creative during these unprecedented times and beyond. Our WFHN-TV live programming is not only dedicated to delivering content that is entertaining but also empowering or educational in nature. With everyone being at home, while the world around us changes, I realized my community also needed content that enabled them to be part of the solution. So I've focused on creating programming that focuses on social justice issues and gives clear calls of action to all those watching: [Altísimo Live!](#),

the historic Latin Music and Pop Culture Livestream raised over \$1.7 million for the farmworkers of the United States and Puerto Rico and [#IAmVanessaGuillen - The Project](#), the thought-provoking Livestream dedicated to the slain U.S. Army soldier Vanessa Guillen and those who have experienced sexual harassment and/or assault in the military.

I also started #HomeworkForChange this year, which gives my audience snackable action steps they can do daily to move the needle towards the change we all wish to see. Our "homework assignments" range anywhere from signing a petition, or calling elected officials at the numbers I share to advocate for a person or issue and having a script to follow when you do, to joining me for a Q&A with experts in a given field, or supporting a GoFundMe to benefit someone in unexpected need like a street vendor getting beat up or a protestor getting seriously injured.

## How did you celebrate your birthday during quarantine?

My birthday was in April, right in the thick of the shutdown, and I already had seen a few friends having a hard time with having to "skip" on having a big bash this year. So I felt compelled to do something just as much for them, as for myself. Inspired by Quince culture, I ended up throwing myself a costume Birthday party over Zoom to celebrate becoming a QuaraTEEN! It was a cool way to connect with so many of my friends from all over the world and for many of them to meet each other too.

## About Lizza

I have always been and continue to be focused on how I drive value to my community. My content falls under three main pillars: education, empowerment and entertainment with a focus on my life on the set, travel, lifestyle, tech, cars, social justice and philanthropy. That has expanded now into other fields that I am excited about exploring as the foundation to entertain, educate and empower while spreading love and having fun remains the same.







# SPECIAL SECTION: GAMING DURING COVID





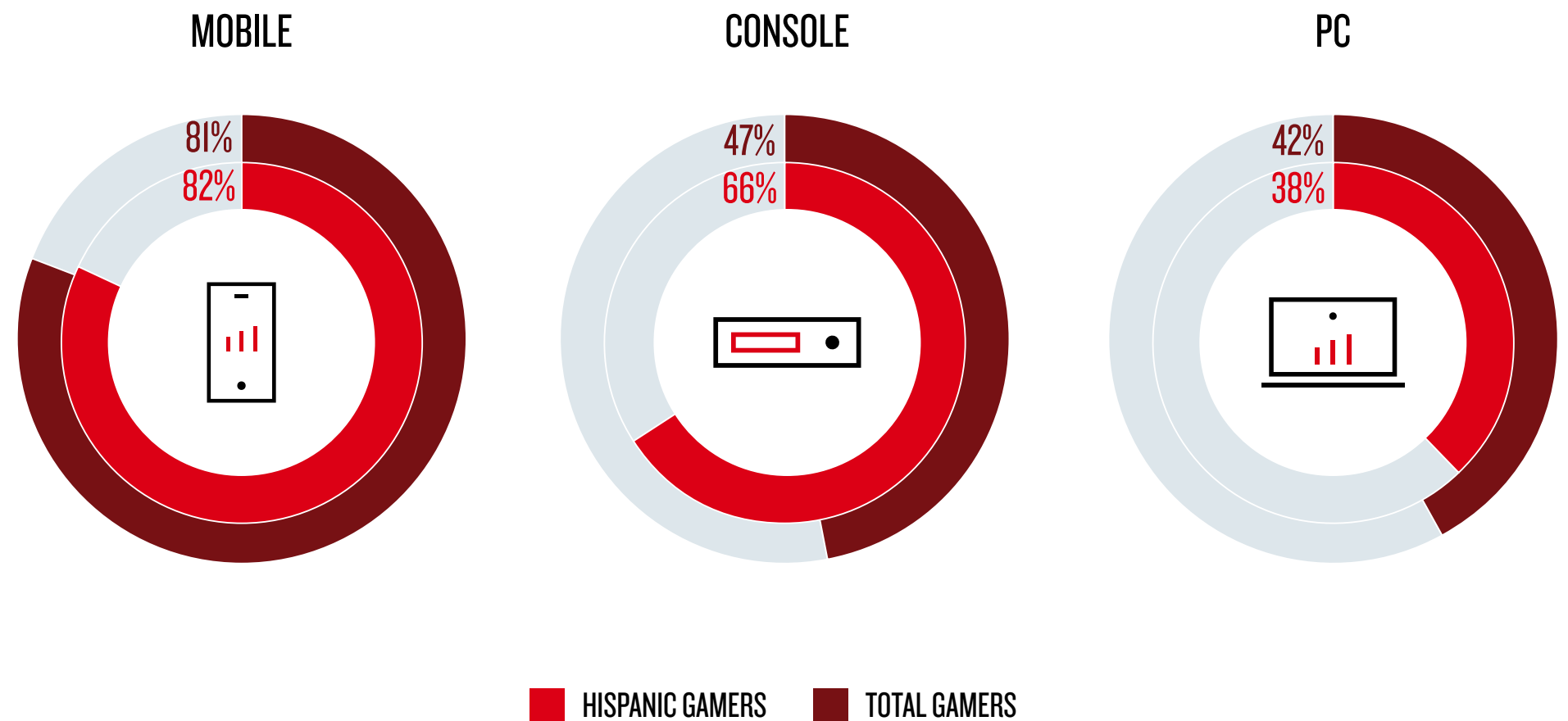
# GAMING

While families are social distancing, gaming platforms surfaced as an important entertainment tool. Video games have come to the forefront of stay-at-home activities that serve as a distraction from coronavirus difficulties, and 31% of all Hispanics say they have increased their time spent playing video games online or with a gaming device since the outbreak. In fact in the month of April, gaming communication apps like Discord and Twitch had the highest percent increase when compared to February, 28% and 84% respectively.


The most-used devices among gamers are smartphones and tablets, where eight in 10 Hispanic gamers say they have used their mobile device to play video games in the past three months.

## CONSOLE & MOBILE ARE TOP PLATFORMS

Device Typically Used to Play Video Games



\*Devices used for gaming in past 3 months  
Source: SuperData General Game Consumer Survey



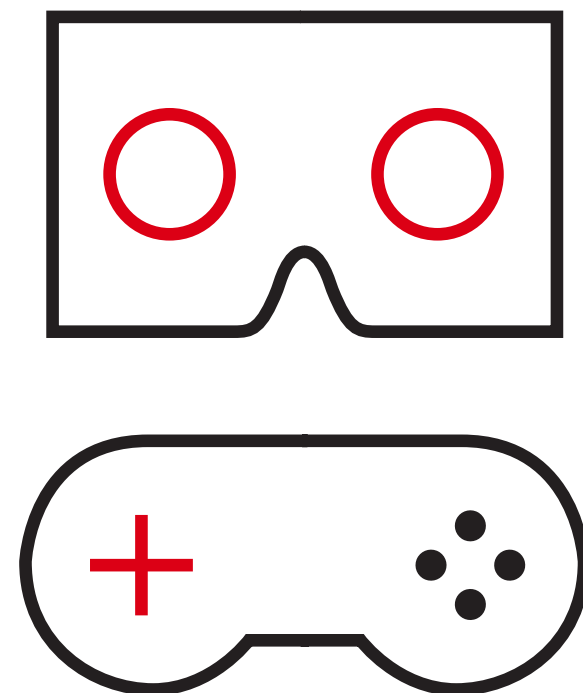
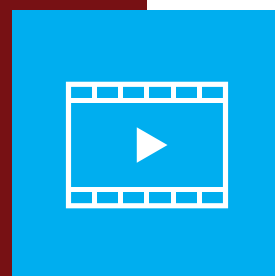
31%

OF ALL HISPANICS SAY THEY HAVE INCREASED THEIR TIME SPENT PLAYING VIDEO GAMES ONLINE OR WITH A GAMING DEVICE SINCE THE CORONAVIRUS OUTBREAK.

Many serious Hispanic gamers prefer console gameplay, where they are 29% more likely than the average gamer to have used this device. And Hispanic gamers over-index on playing fighting and shooter games like Super Smash Bros and Call of Duty, which are typically played on a console and can often be played with others increasing the ability to socialize.

Hispanic gamers also watch a variety of content like playthroughs, gamer commentary and news, reviews and live streams on various platforms. Eighty-two percent of Hispanic gamers watch at least one hour of video gaming content on per week Twitch and 64% spend one hour or more on YouTube in a typical week, providing much needed entertainment escape from the pressures of COVID-19.

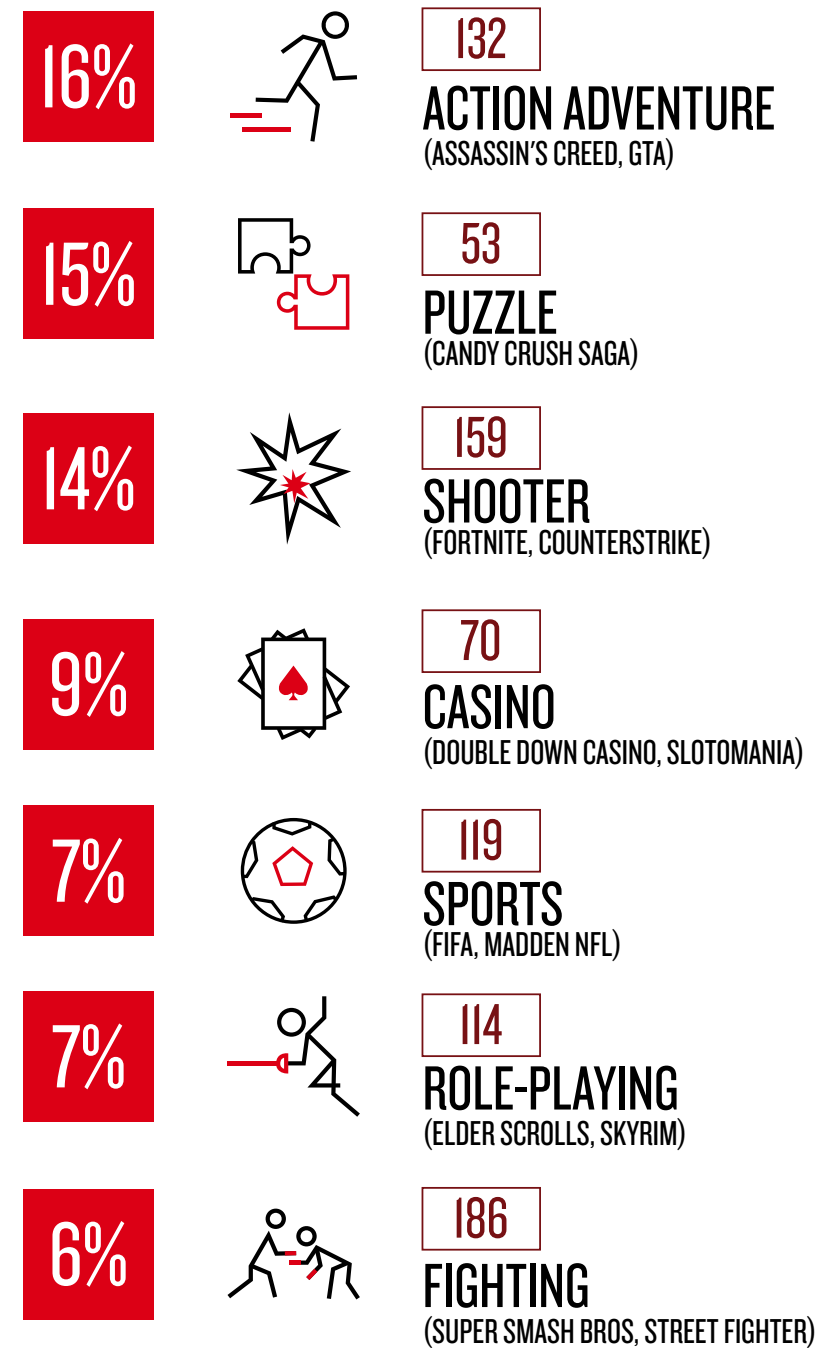
**82%**  
OF HISPANIC GAMERS WATCH AT  
LEAST ONE HOUR PER WEEK OF  
VIDEO GAMING CONTENT ON TWITCH



### GAME CATEGORIES PLAYED MOST OFTEN AMONG HISPANIC GAMERS

■ HISPANIC GAMERS

□ HISPANIC INDEX TO NON-HISPANICS



\*Game categories played most often in past 3 months  
Source: SuperData General Game Consumer Survey



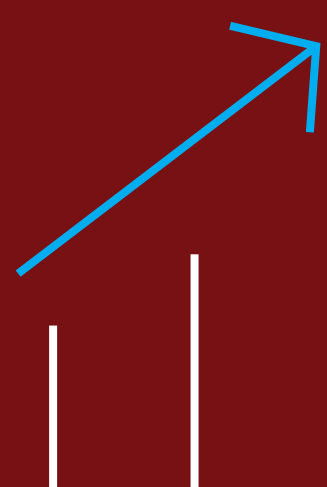


# ABOUT THE LATINO COMMUNITY

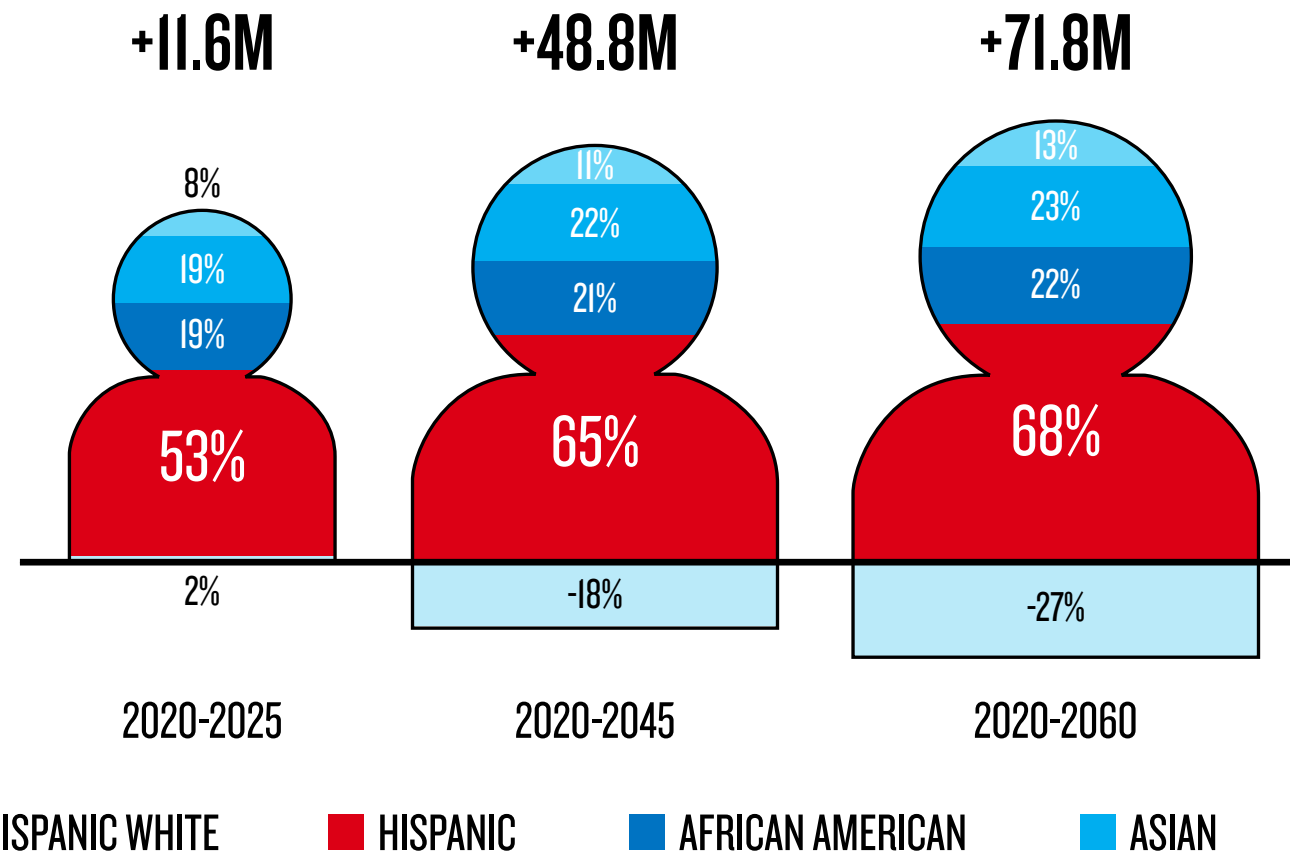
Latinos will contribute more growth than any other population segment, a factor compounded by a projected growth decline among the non-Hispanic White population.

For the next 40 years, Latinos, the largest minority population in the U.S., will be the primary contributors to total U.S. population growth,

**COMPRISING 53% OF THE GROWTH IN JUST THE NEXT FIVE YEARS AND 68% OF THE GROWTH TO 2060.**



### % CONTRIBUTION TO TOTAL POPULATION GROWTH BY RACE/ETHNICITY



■ NON-HISPANIC WHITE ■ HISPANIC ■ AFRICAN AMERICAN ■ ASIAN ■ OTHER

Source: 2018 American Community Survey



# HOGARES Y FAMILIAS

Multigenerational households are the nexus of the Hispanic community—examples of cultural collectivism and shared support systems. And they provide the environment that nurtures Latinidad across generations.

**HISPANICS ARE 40%  
MORE LIKELY TO LIVE IN  
MULTIGENERATIONAL  
HOUSEHOLDS.**



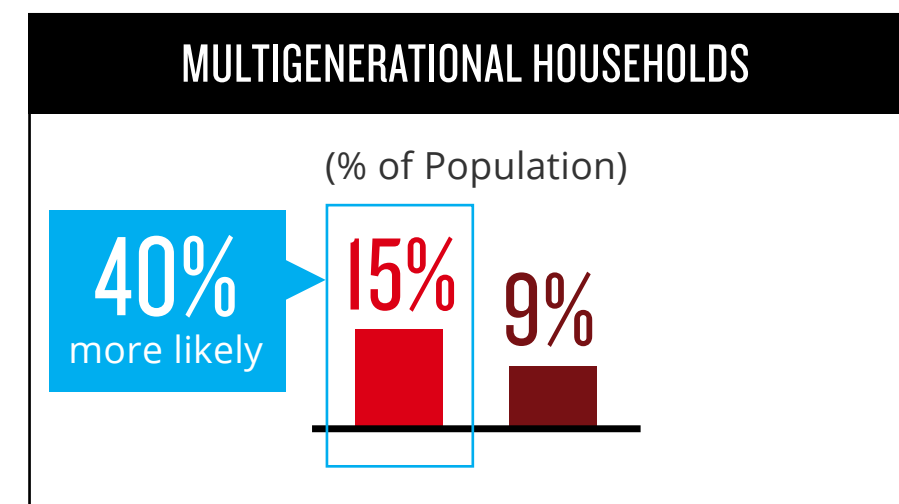
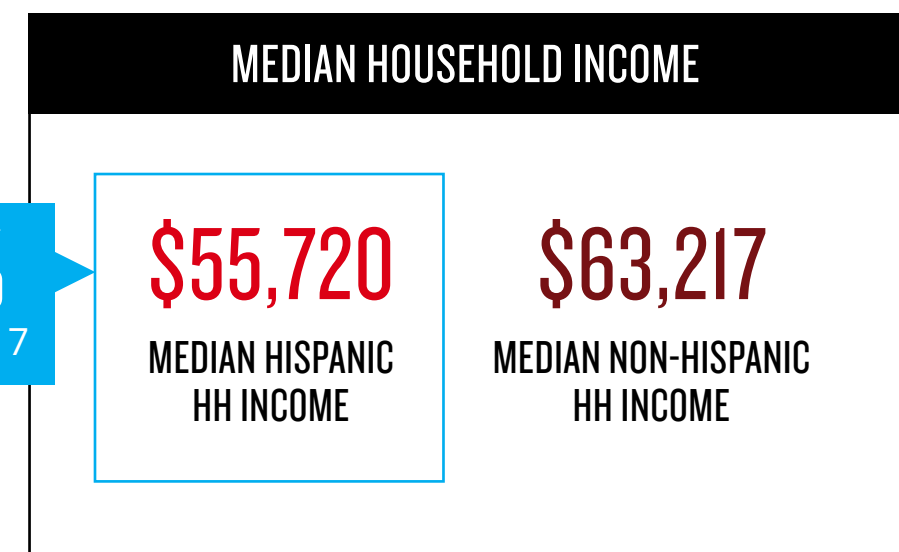
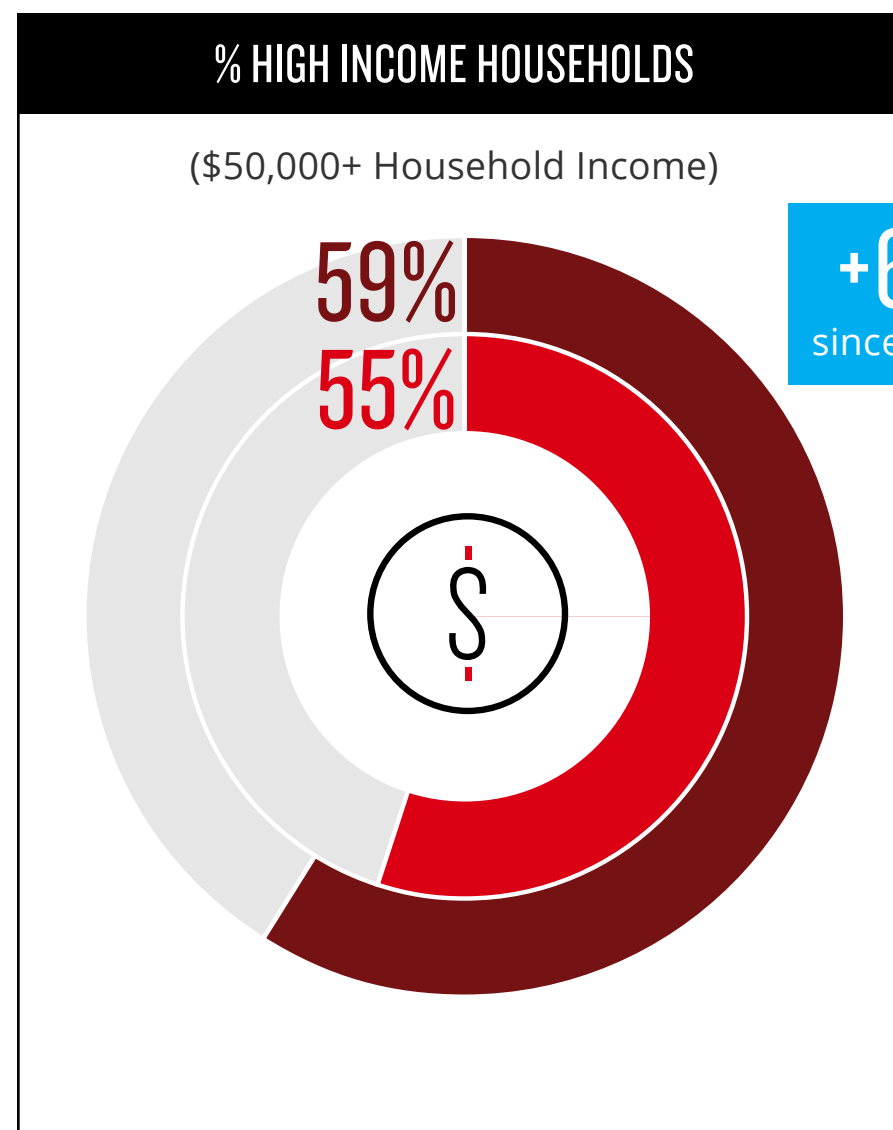
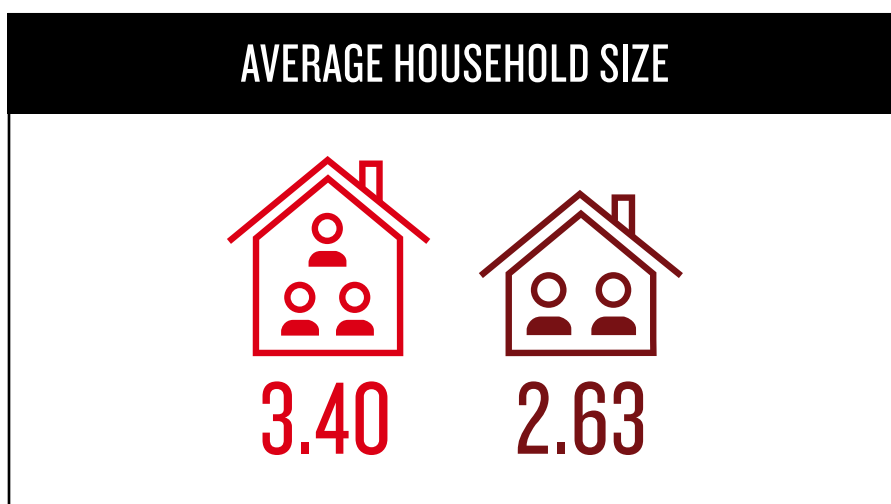
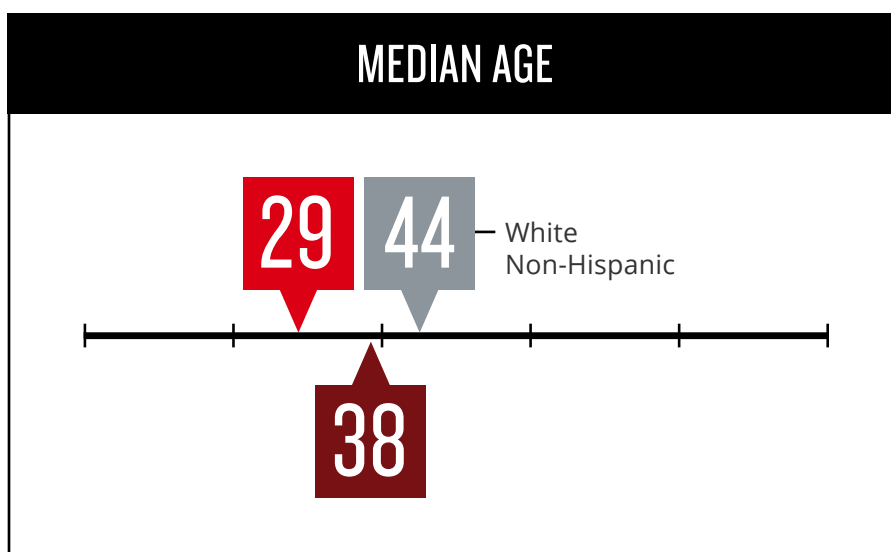
Over the next 10 years, the disproportionately young Latino community will over contribute based on their relative size to the economic recovery, through home purchases and the acquisition of goods and services.

\* Hogares y Familias - Home and Family



# INSIDE THE HISPANIC HOUSEHOLD

■ U.S. HISPANICS ■ TOTAL U.S.



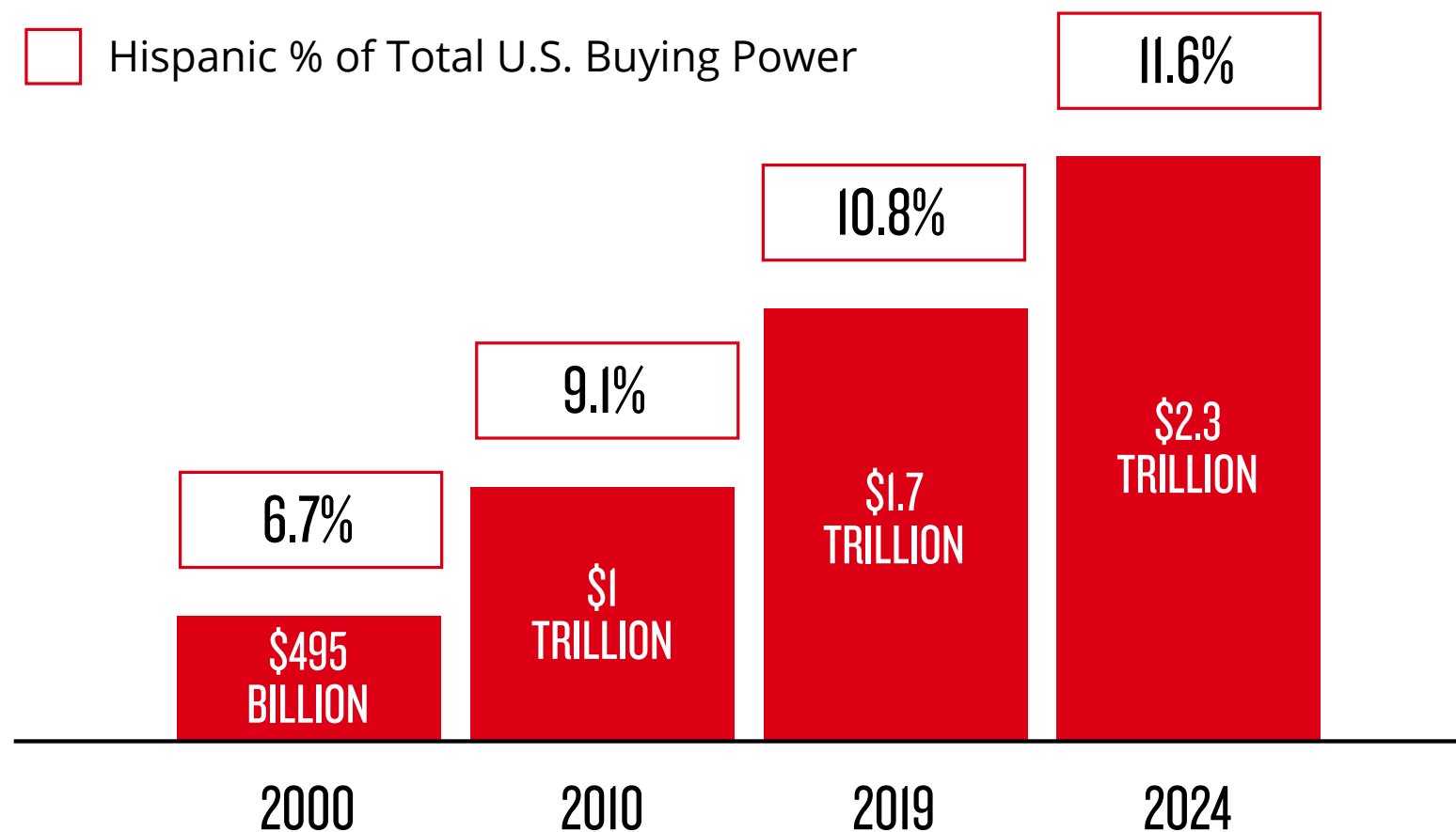
Source: 2018 American Community Survey

# HISPANIC BUYING POWER

FROM 2010 TO 2019, HISPANIC BUYING POWER INCREASED BY 69%, OUTPACING NON-HISPANICS, WHO INCREASED BY 41% DURING THE SAME TIME.



HISPANIC BUYING POWER 2000-2024



Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2019



# LANGUAGE AND LATINIDAD

Latinos bring a broad range of heritage and traditions and have made significant cultural contributions to the U.S. way of life. Latino identity, or “Latinidad”, is a central pillar that pulls together the community, celebrating various shared attributes, without diminishing the importance of each country of origin. Spanish language and culture are pillars of Latinidad and serve as the foundation on which social networks are built, and cultural equity is earned and exchanged within the community.



**LATINOS ARE LARGELY  
BILINGUAL AND BICULTURAL,  
WITH 75% SPEAKING  
SPANISH AT HOME.**



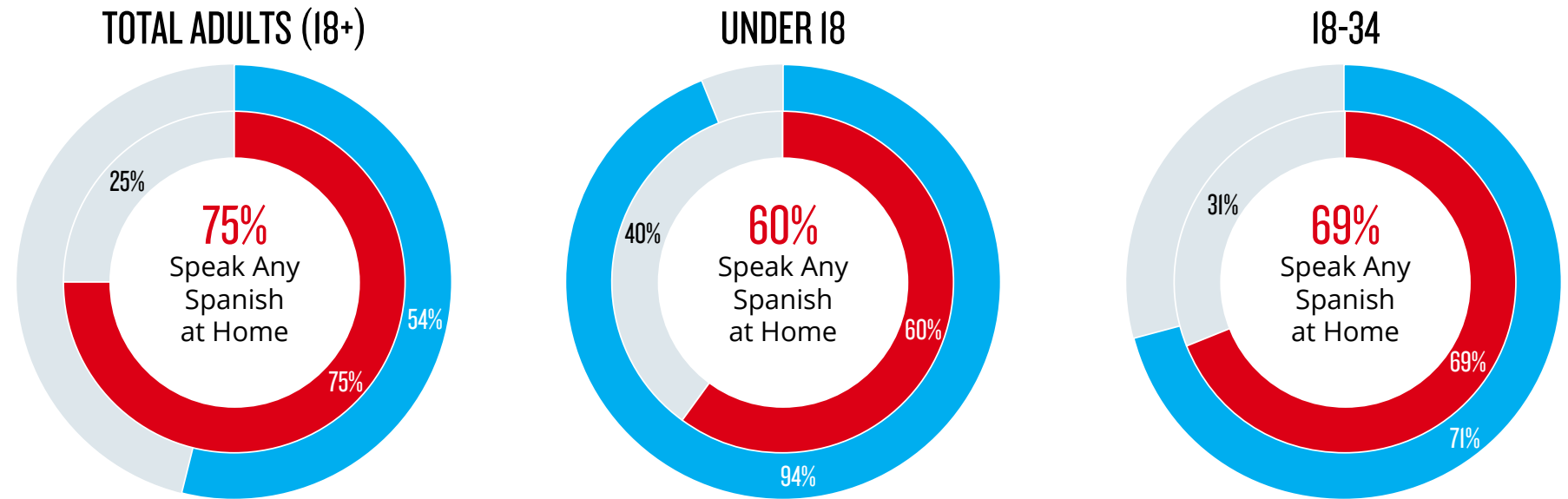


Despite the rapid growth of U.S.-born Hispanics, Spanish language use remains strong across all age segments. Thus, when and where Latinos choose to connect through language is an outgrowth of a desire to connect with the culture. When Latinos connect with each other, brands or content in Spanish, they do so by choice—making a meaningful and purposeful connection with trusted channels, content and dialogue.

Overall, three-quarters of Hispanic adults speak Spanish at home even though only 54% are U.S. born. As younger generations are increasingly U.S. born, connecting in Spanish is a cultural choice many Latinos make which is identity defining and supports the retention of strong ties to their Latinidad.

### LANGUAGE SPOKEN AT HOME AND U.S.-BORN HISPANICS BY AGE

■ SPEAK ANY SPANISH AT HOME    
 ■ SPEAK ONLY ENGLISH AT HOME    
 ■ U.S.-BORN



Source: 2018 American Community Survey







# METHODOLOGIES

## 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.

## NIELSEN SCARBOROUGH

Nielsen Scarborough USA+ 2019 Release 2: Scarborough measures the unique shopping patterns, product usage, demographics, lifestyles and cross-media behaviors of the American consumer at a local, regional or national level, giving the ability to profile over 2,000 measured categories and brands.

## NIELSEN SOCIAL CONTENT RATINGS

Nielsen Social Content Ratings® (SCR) is the first standardized third-party measurement of program-related social media activity across Facebook, Instagram and Twitter. With the continued fragmentation of media and consumer choice, social TV data, which measures the social media response to television content, is a valuable way for industry players to better understand how fans are engaging with television and brands. SCR delivers one comprehensive solution to help networks, agencies and advertisers measure, understand and act on social TV.

## NPOWER METHODOLOGY

NPOWER is the Nielsen Company's national custom analysis system, is a powerful tool that offers an unparalleled ability to focus on very specific audience characteristics and opens opportunities for detailed analysis of national television media. NPOWER employs a respondent-level data warehouse that subscribers access through a browser-based interface. Audience estimates can be generated, not only for all standard demographics and market breaks, but also for expanded audience characteristics that cannot be accessed anywhere else.

## SUPERDATA METHODOLOGY

SuperData questionnaires are written using survey science best practices and are reviewed by industry experts for accuracy and validity. All questions are worded clearly and provide actionable data. Data is collected from quantitative web surveys and all respondents are sourced from industry-leading survey panels. SuperData screens panel partners to ensure that they can offer robust targeting criteria in order to collect data from the general population as well as niche subgroups. Data collection is monitored daily to ensure that incoming survey data meets Nielsen standards for quality and accuracy.

## 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. Timeshifted 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 + Timeshifted 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.

## 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) 03/30/2020 - 06/07/2020 via Nielsen NPOWER/National Panel; Radio June 2020 via RADAR 145 + National Regional Database (NRD) Fall 2019 for 111 Hispanic DST Metros and 128 Black DST Metros ; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. 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.

## TELEVISION DISTRIBUTION STATUS, DEVICE OWNERSHIP

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

## MEDIA TECH TRENDER

MediaTech Trender is a quarterly consumer tracking study by Nielsen Media Analytics. With a focus on awareness, ownership, usage, purchase interest, use cases and perceptions of emerging technology devices and services, the study also covers at least one deep-dive module each quarter to examine a specific research topic. A quantitative online survey is offered in both English and Spanish to a U.S. general population sample 13 years or older. Both household and person weights are developed each quarter to represent the age, gender, racial/ethnic, education, income, household ownership, and technological adoption proportions of the U.S. general population.



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## 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](http://www.nielsen.com).



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