



THE NIELSEN TOTAL AUDIENCE SERIES

THE NIELSEN TOTAL AUDIENCE REPORT

Q2 2017



**PETER KATSINGRIS, SVP
AUDIENCE INSIGHTS**

On my daily commute, it's become normal for me to find that the majority of my fellow commuters are thoroughly engrossed with their digital devices—whether they are listening to music, watching video content, reading or just playing games. These devices have become a constant companion to over 200 million consumers in the U.S. and this personalized entertainment is always at their fingertips.

Being in research, these commuters with their heads down and thumbs up lead to many questions for me. What are they watching? Is it a movie or a TV episode or a short-form video clip? Is this adding to or replacing time they may have watched at home? How many different social apps are they using? Is music being streamed or part of their library on their phone?

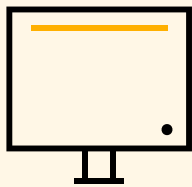
In the Q2 2017 edition of the Nielsen Total Audience Report, we continue to explore this ever-changing media landscape. After all, adults in the U.S. are spending an additional half hour more a day compared to last year connected to media across platforms—digital, audio and television—which are the three platforms of content distribution and discovery for the average consumer.

In the upfront section of the report, as opposed to focusing on one central theme, we spotlighted insights across these platforms. For television, we focused on internet enabled TV-connected devices. These increasingly popular devices allow consumers to stream content to their television set in addition to traditional television programming. For audio, we looked at different listener behaviors. A majority of AM/FM radio usage takes place *away* from the home while consumers are at work or in transit during their commute. For digital, we looked at the two largest categories for time spent across computers, smartphones and tablets—entertainment and search engines/social networking.

As consumer behaviors evolve, so will this report. As we move forward with the Q3 2017 report, changes will be made to make sure you have the most relevant information to understand the changing media landscape.

A handwritten signature in black ink that reads "Peter". The signature is fluid and cursive, with a long horizontal stroke extending from the end of the word.

PETER

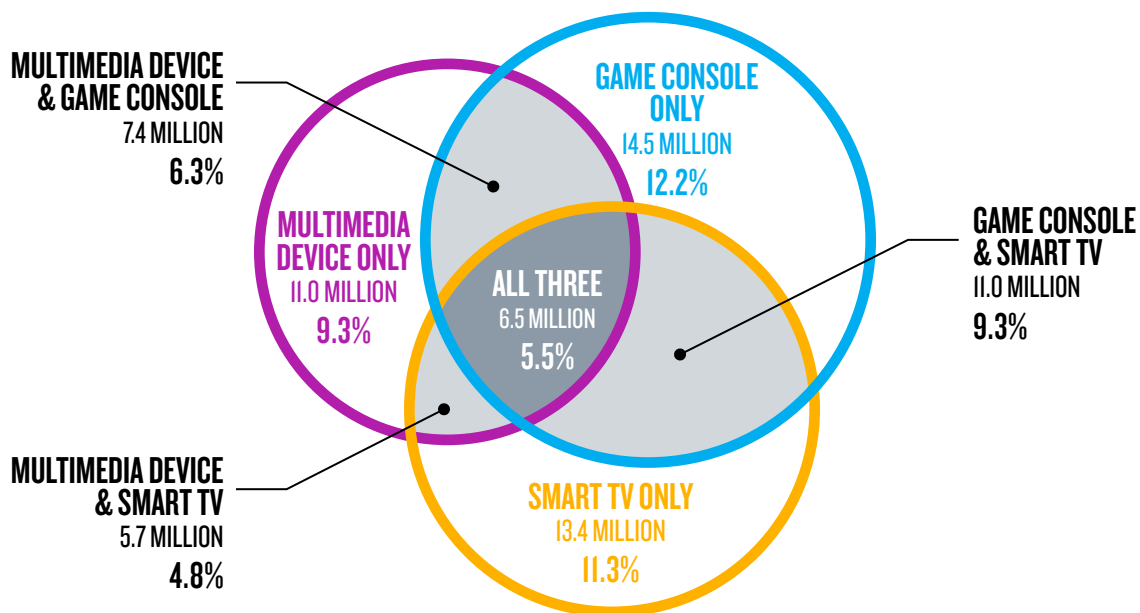


TV SPOTLIGHT

With the continued emergence of technologies, households are adapting new means to receive content. As of June 2017, 58.7% of TV Households (or 69.5 million TV households) own at least one Internet-enabled device that is capable of streaming content to the television set. This includes an enabled multimedia device, an enabled Smart TV or an enabled video game console. Penetration of these devices grew by 12% from June 2016 when penetration was 52.2%.

HOUSEHOLD OWNERSHIP OF ENABLED DEVICES (ONE, TWO OR THREE)

Of the 58.7% of TV Households that have an enabled device...

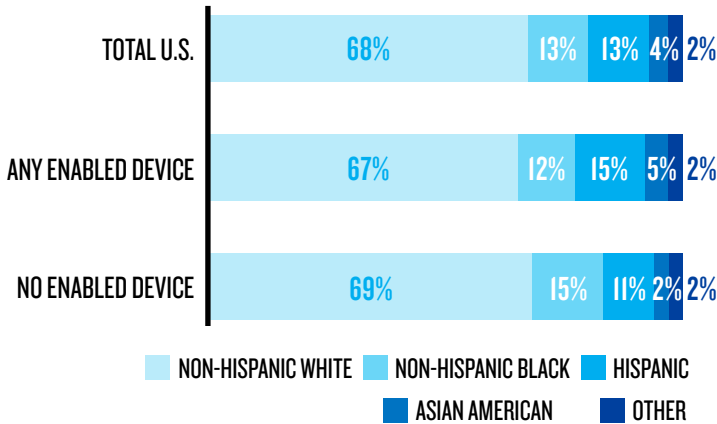


	BLACK	HISPANIC	ASIAN AMERICAN
Multimedia Device Only	8.5%	7.1%	11.3%
Game Console Only	12.9%	13.9%	10.5%
Smart TV Only	9.3%	11.6%	15.3%
Multimedia Device & Game Console	6.3%	6.7%	9.1%
Multimedia Device & Smart TV	4.4%	4.7%	10.0%
Game Console & Smart TV	7.8%	12.2%	10.6%
All Three	5.7%	7.2%	9.0%
At Least One Device	54.9%	63.4%	75.6%

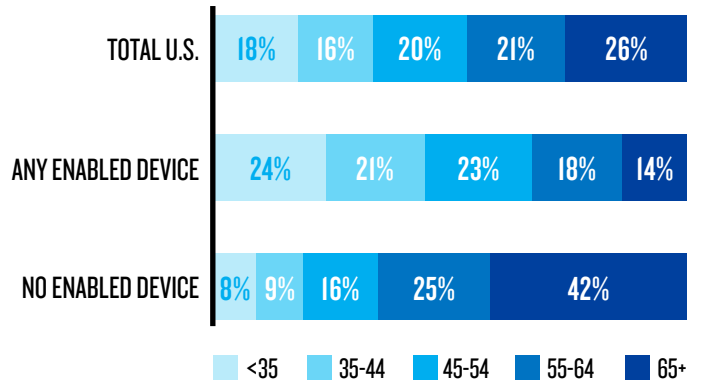
Source: Nielsen National Panel, 6/15/2017, Household, Sum of pieces may vary slightly from total due to rounding
Multimedia Devices includes the four main digital streaming device brands solely used to stream content.

HOUSEHOLD PROFILE

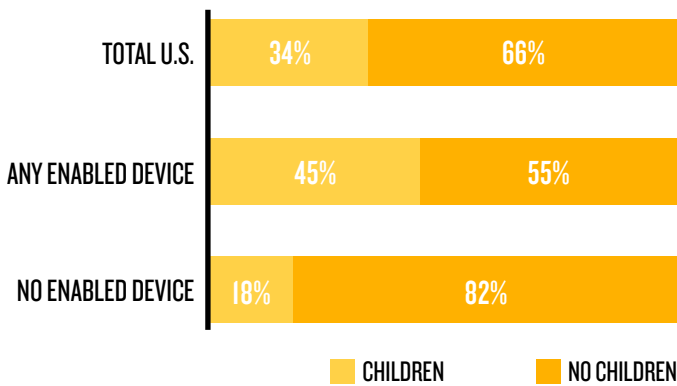
RACE/ETHNICITY



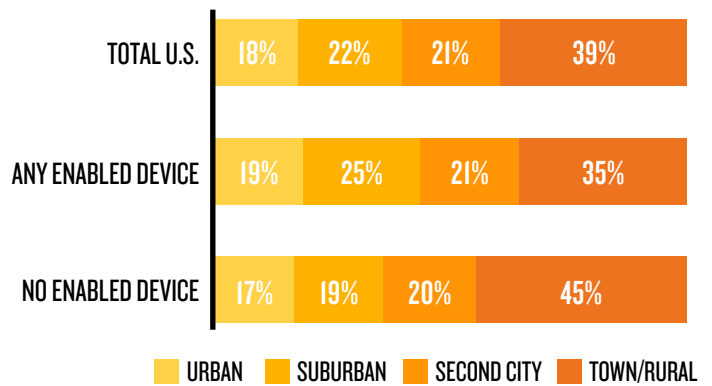
AGE OF HEAD OF HOUSEHOLD



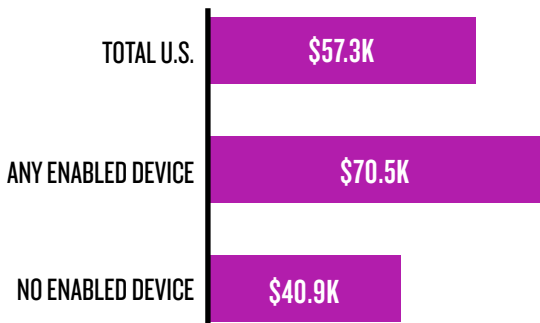
PRESENCE OF CHILDREN



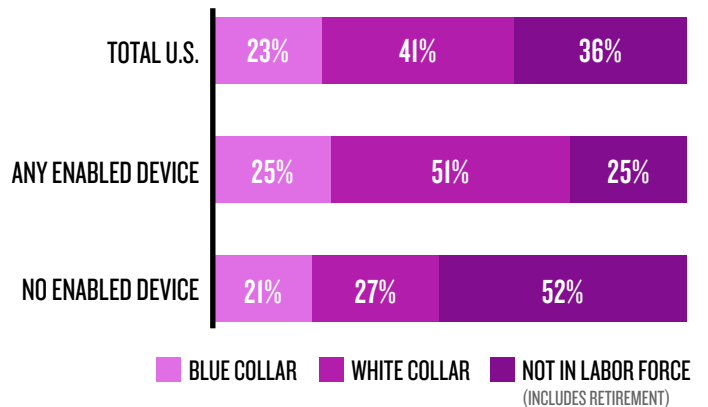
URBANICITY



MEDIAN INCOME



EMPLOYMENT

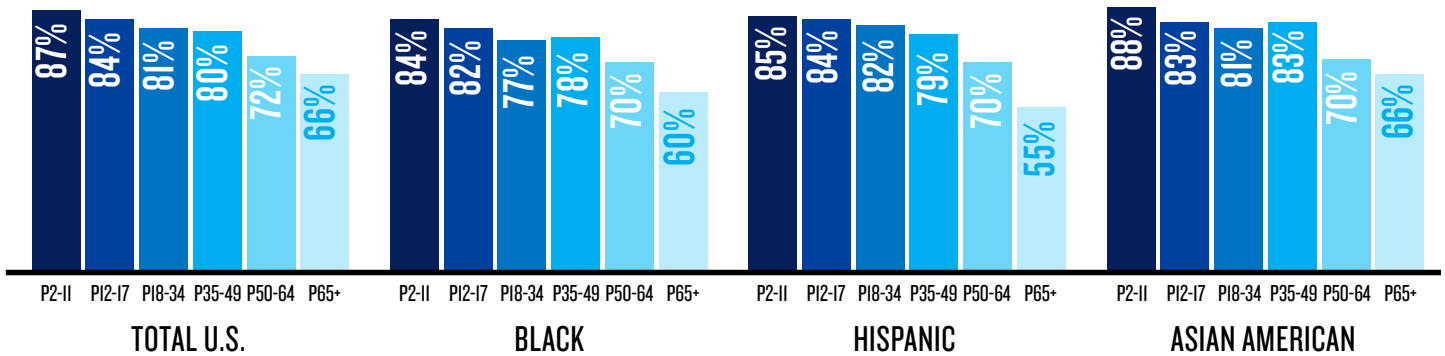


Enabled device homes skew younger with nearly half under the age of 45 and are much more likely to have children. There are a greater percentage of these homes in urban and suburban areas. These device owners are more affluent and work primarily in white-collar occupations. They also have a larger proportion of Hispanics and Asian Americans.

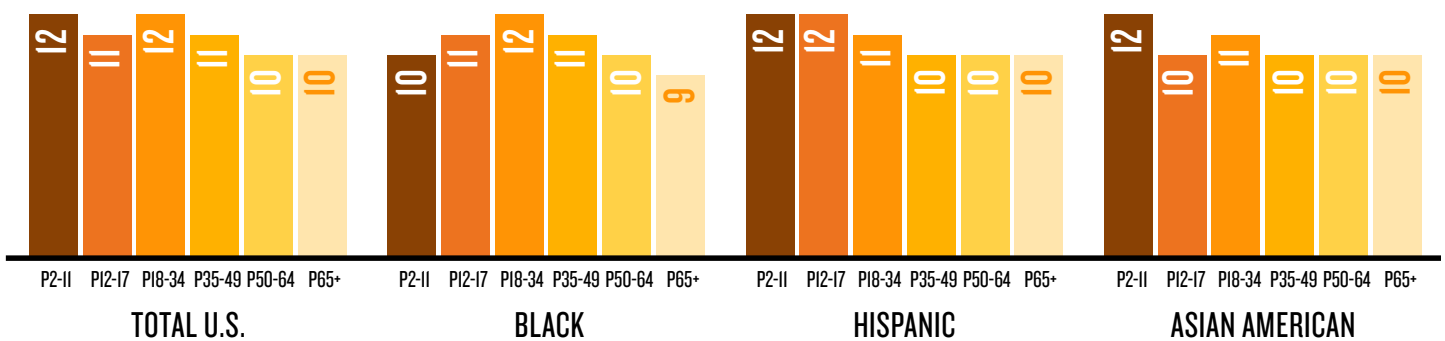
Source: Nielsen National Panel, 6/15/2017, Household, May vary slightly from 100% due to rounding
 Enabled Device = enabled multimedia device, enabled Smart TV, or enabled video game console

ENABLED DEVICE USAGE AMONG USERS

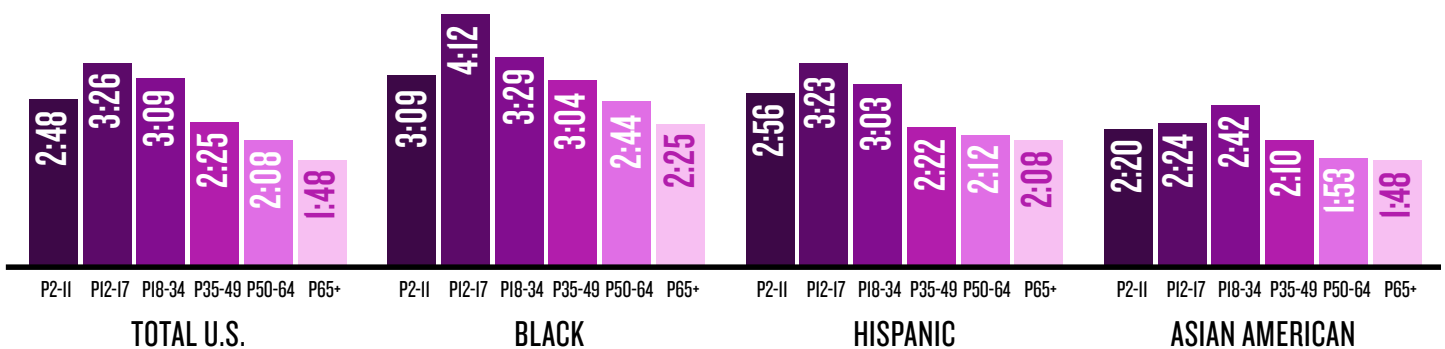
HOW MANY – MONTHLY REACH %



HOW OFTEN – AVERAGE DAYS IN THE MONTH WITH USAGE



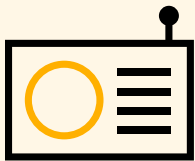
HOW LONG – DAILY HOURS: MINUTES OF USAGE



- Kids have the greatest reach of enabled devices while teens and persons 18-34 spend the most time with these devices on a day with usage. Users of these devices ages 2-34 spend as much as 12 days using them within the month.
- Reach and Frequency metrics are similar across race and ethnicity. Blacks followed by Hispanics spend the most time with these devices. Black and Hispanic teens spend the most time with the devices on usage days.

Source: Nielsen National Panel, June 2017

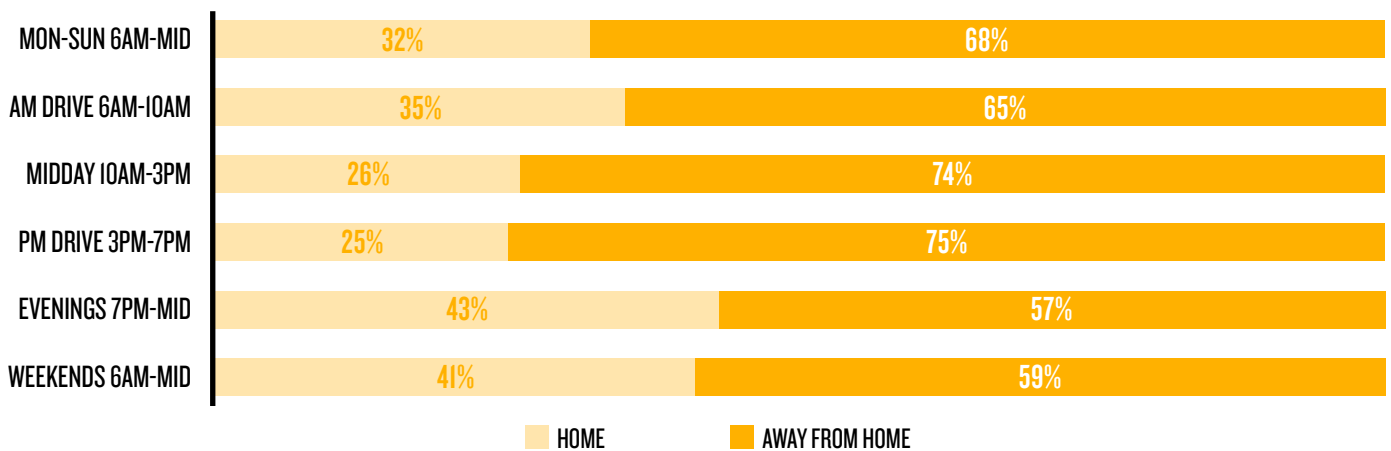
Enabled Device = enabled multimedia device, enabled Smart TV, or enabled video game console



AUDIO SPOTLIGHT

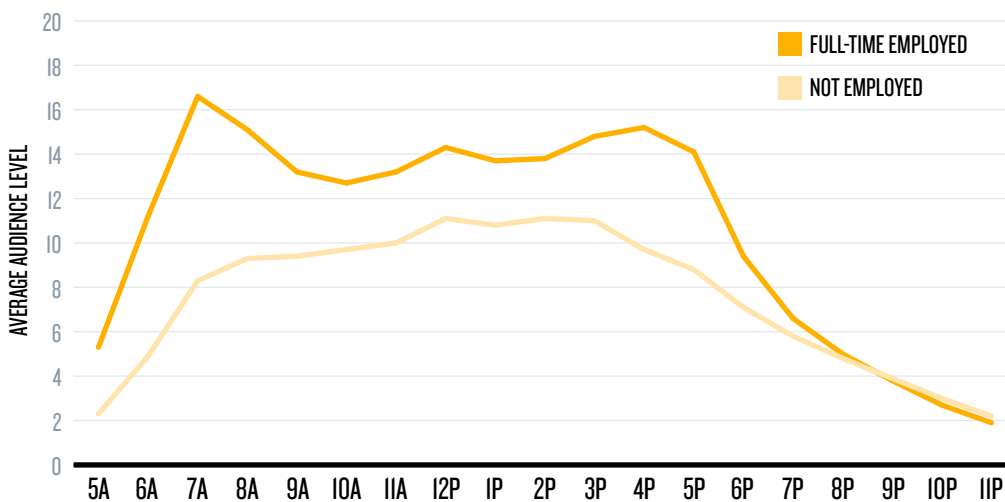
AM/FM radio is an away-from-home medium with employed users who listen 2.5 hours longer than those not employed. The audience is very consistent all year with very high reach and frequent usage at 5 out of 7 days per week. Most listening goes to the listener's favorite station and there are many formats tailored to reach a large group with common interests.

DISTRIBUTION OF AQH LISTENING BY LOCATION & DAYPART FOR AM/FM RADIO



Source: Nielsen RADAR 134 / Share of Average Quarter Hour Audience by Listening Location for Persons 18+

HOURLY AQH RATING BY EMPLOYMENT TYPE FOR AM/FM RADIO



Source: TAPSCAN™ Web National Regional Database, Spring 2017, P18-64 AQH Rating, M-F 5A-12M



76%

OF 18-64 RADIO LISTENERS
ARE IN THE WORKFORCE

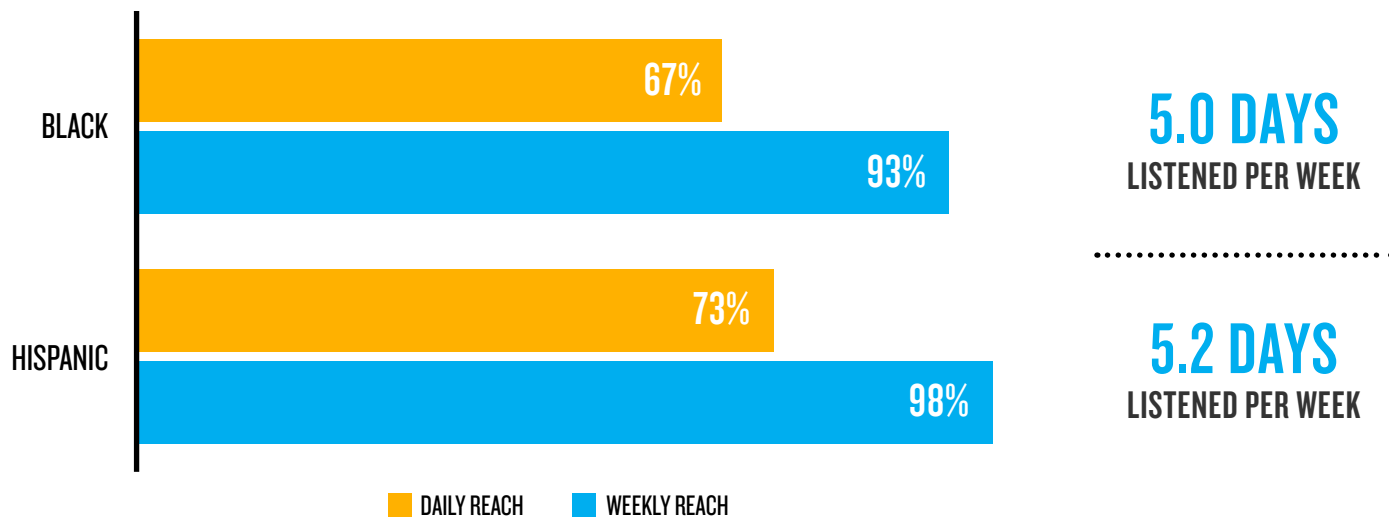


FULL-TIME EMPLOYED LISTEN
2.5 HOURS
LONGER PER WEEK
THAN THE NOT EMPLOYED

Nielsen Spring 2017 NRD, Adults 18-64, M-F 6a-12M, Employed = F/T + P/T Employed

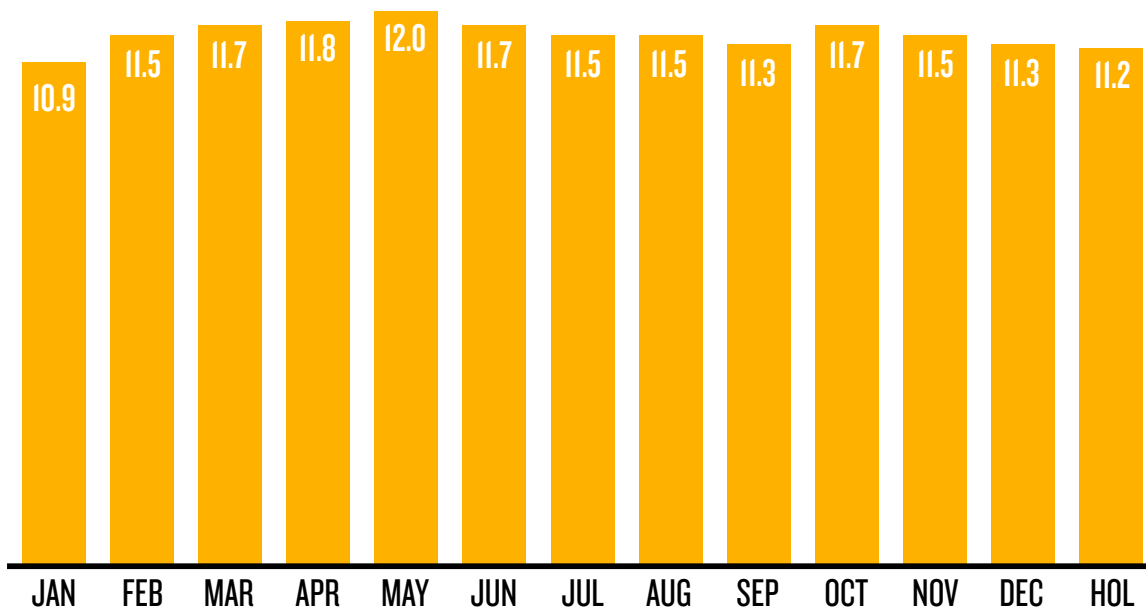
- Most AM/FM Radio usage takes place away from home when people are working or shopping.
- Full-time employed listeners are heavy users of radio compared to those who are not employed.

DAILY AND WEEKLY REACH OF AM/FM RADIO BY ETHNICITY



Source: Nielsen RADAR 134 / M-Su 12M-12M / Daily Cume and Weekly Cume for P18+

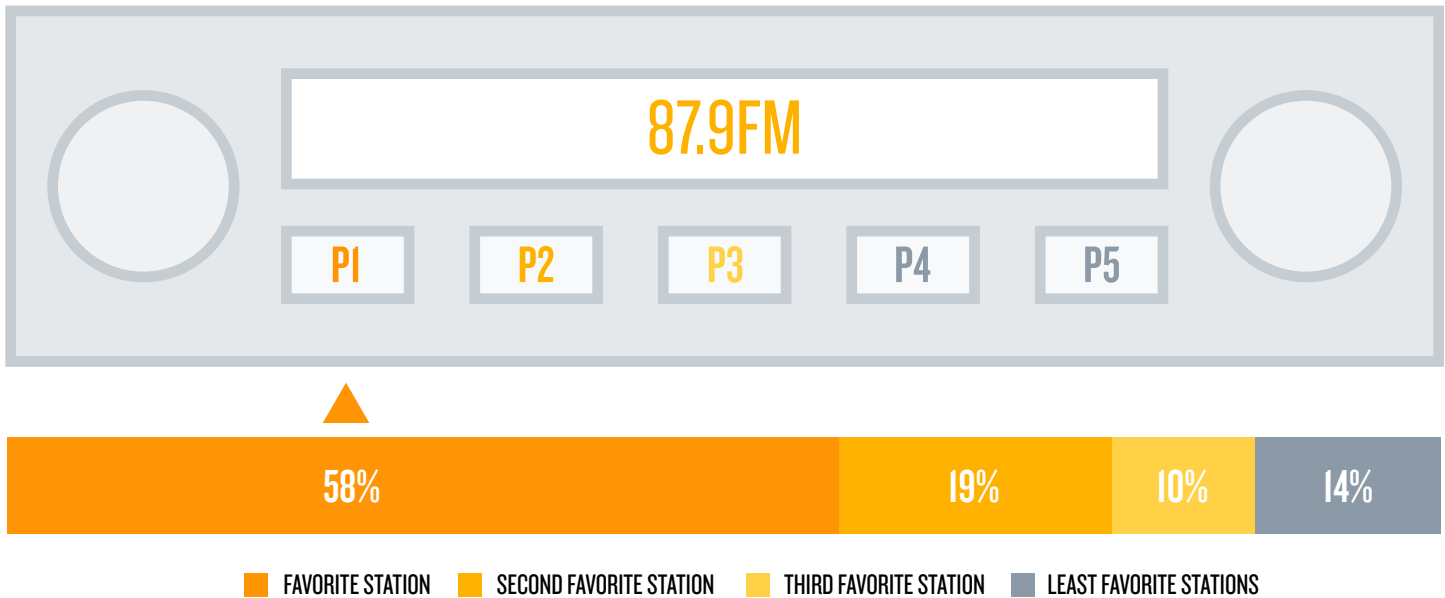
AVERAGE QUARTER HOUR AUDIENCE OF AM/FM RADIO IN MILLIONS



Source: Nielsen Portable People Meter (PPM) markets, JAN 2016 – HOL 2016 / AQH Persons 18+ / M-Su 6A-12M

- 67% of Black adults use radio on a daily basis with an average of 5 days of listening per week.
- 73% of Hispanic adults use radio on a daily basis with an average of 5.2 days of listening per week.
- Very little seasonal fluctuation exists in radio usage which may differ from other forms of media.

LOYALTY: SHARE OF RADIO USAGE BY PREFERENCE LEVEL



Source: Nielsen Portable People Meter (PPM) markets, OCT 2017 / AQH Persons 18+ / M-Su 6A-12M

TOP 20 RADIO FORMATS RANKED BY SHARE OF TOTAL LISTENING

2017 TOP 10 FORMATS

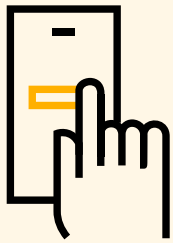
13.6	Country
12.2	News/Talk
7.5	Adult Contemporary
7.0	Pop Contemporary Hit Radio
6.4	Classic Rock
5.9	Classic Hits
5.0	Hot Adult Contemporary
4.2	Urban Adult Contemporary
3.6	Contemporary Christian
2.4	Urban Contemporary

2017 FORMATS 11-20

3.4	All Sports
2.6	Mexican Regional
2.5	Rhythmic Contemporary Hit Radio
2.0	Active Rock
1.9	Adult Hits + 80s Hits
1.9	Alternative
1.8	AOR / Mainstream Rock
1.5	Spanish Contemporary
1.4	All News
1.4	Classical

Source: Nielsen National Regional Database, Spring 2017, M-SU 6AM-MID, Adults18+, AQH Share

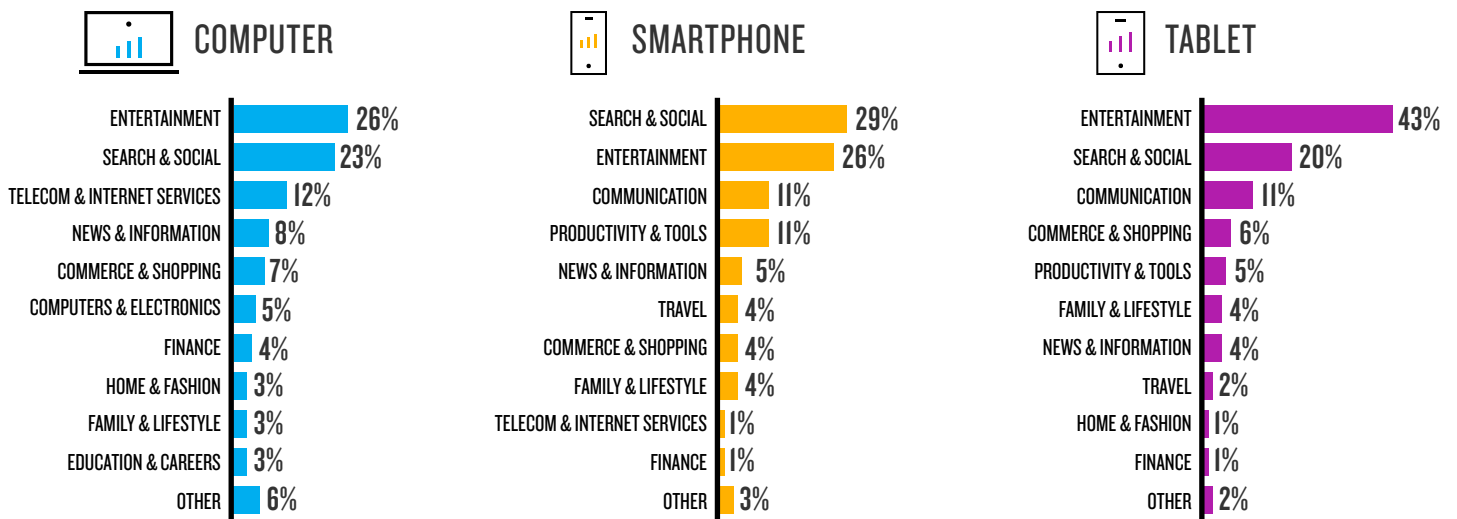
- Most AM/FM radio listening is spent with just one station, the listeners' favorite station.
- Radio formats are tailored to reach a large group with a common interest.



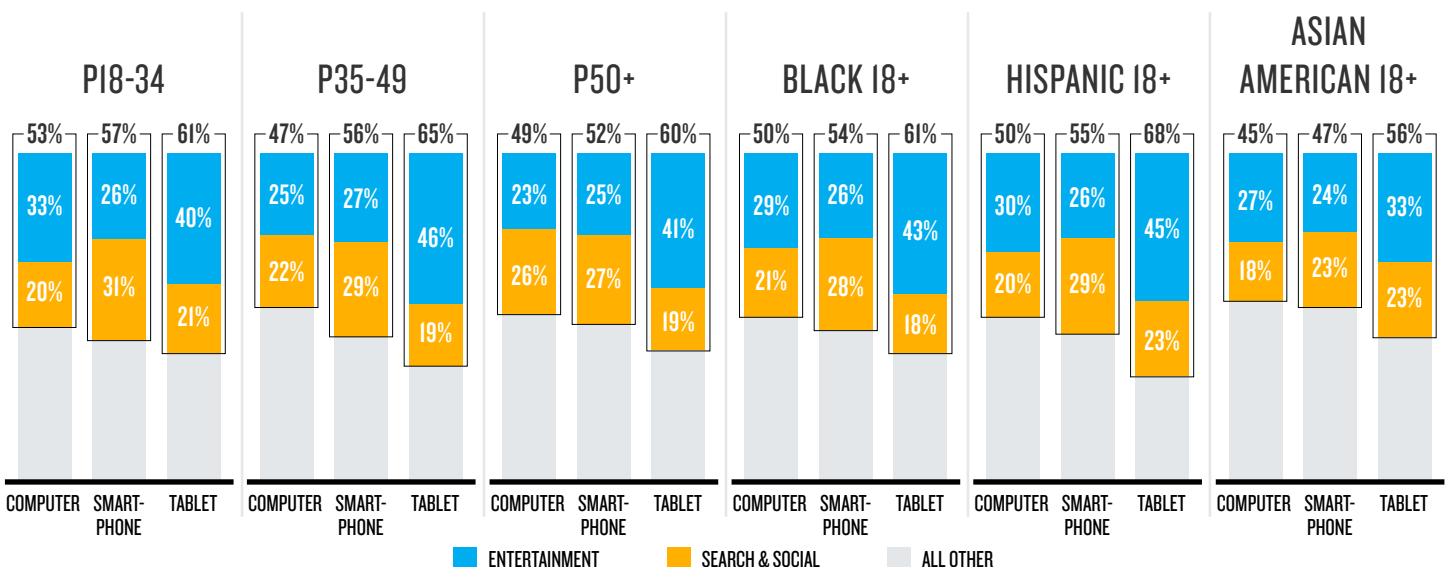
DIGITAL SPOTLIGHT

Across computers, smartphones and tablets, users are spending half or more of their time with two categories—entertainment and search engines/social networking. While a greater share of time is spent with search & social on smartphones, tablet usage skews more heavily toward entertainment. Computer usage varies by demographic with younger users favoring entertainment on these devices and older users spending more time with search & social.

SHARE OF GROSS MINUTES BY CATEGORY AMONG ADULTS 18+



SHARE OF GROSS MINUTES BY CATEGORY BY DEMO & RACE/ETHNICITY



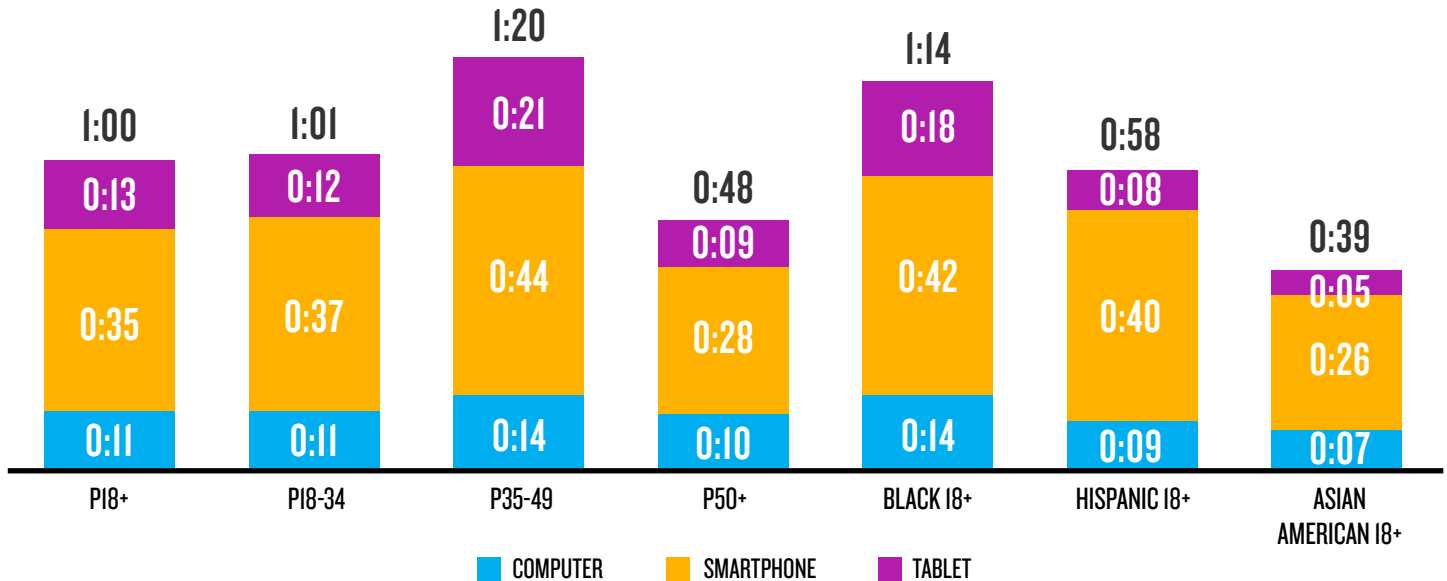
Source: Nielsen Netview (Computer), EMM (Smartphone & Tablet), June 2017

Categories may differ across device. Categories with a smaller share were grouped into "Other". May vary slightly from 100% due to rounding.



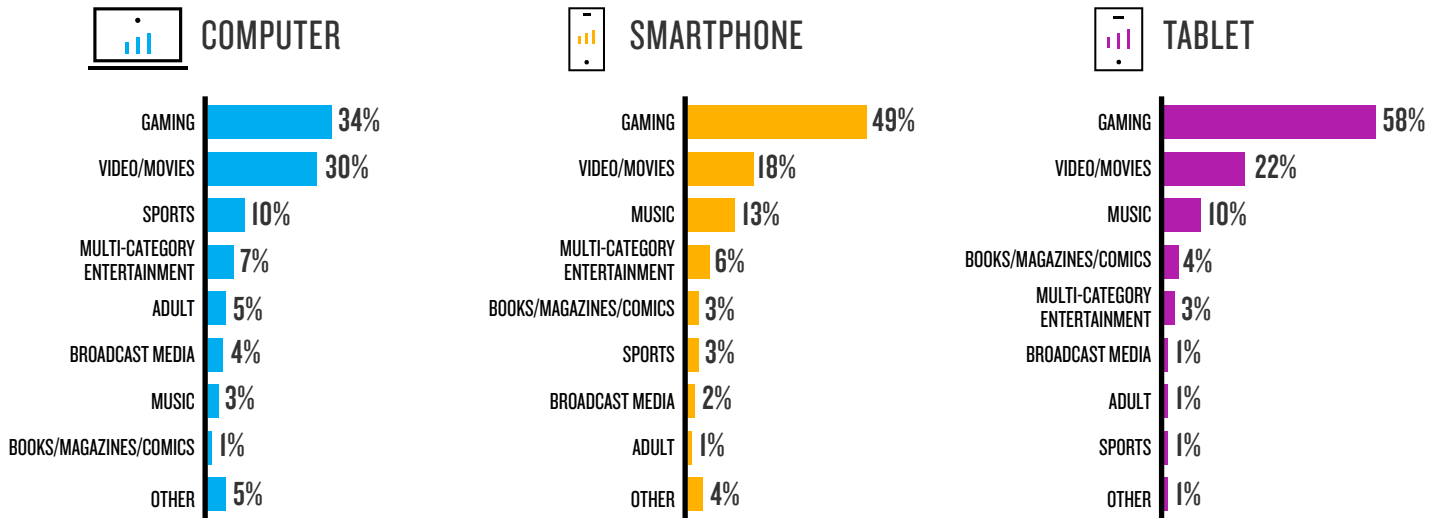
TIME PER PERSON PER DAY ON ENTERTAINMENT SITES & APPS

AMONG THE TOTAL POPULATION



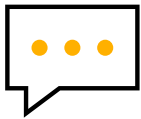
SHARE OF GROSS MINUTES BY ENTERTAINMENT SUBCATEGORY

AMONG ADULTS 18+



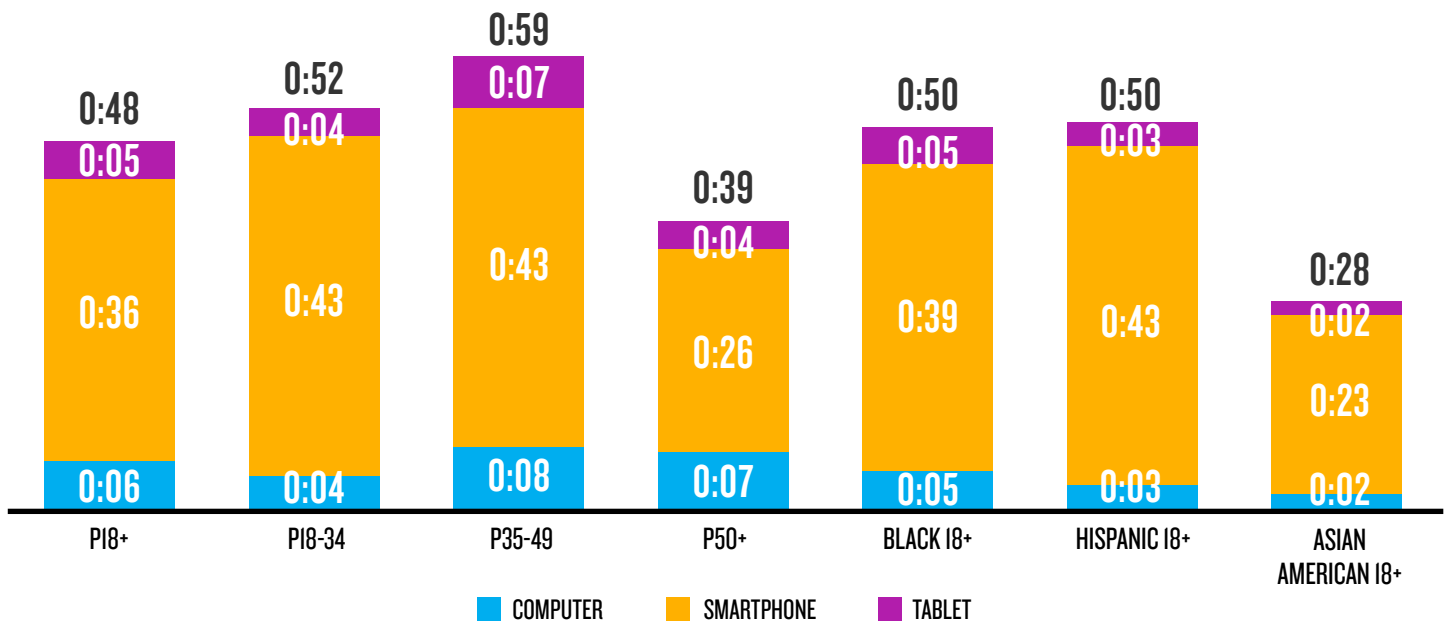
- Adults in the total population are spending an hour a day with entertainment sites & apps across digital devices. This increases another 20 minutes among P35-49 with the majority of time spent coming from smartphones.
- Within entertainment, gaming has the largest share followed by video/movies. These subcategories each make up about a third of usage for computer while there is more gaming happening on mobile devices.

Source: Nielsen Netview (Computer), EMM (Smartphone & Tablet), June 2017, May vary slightly from 100% due to rounding.

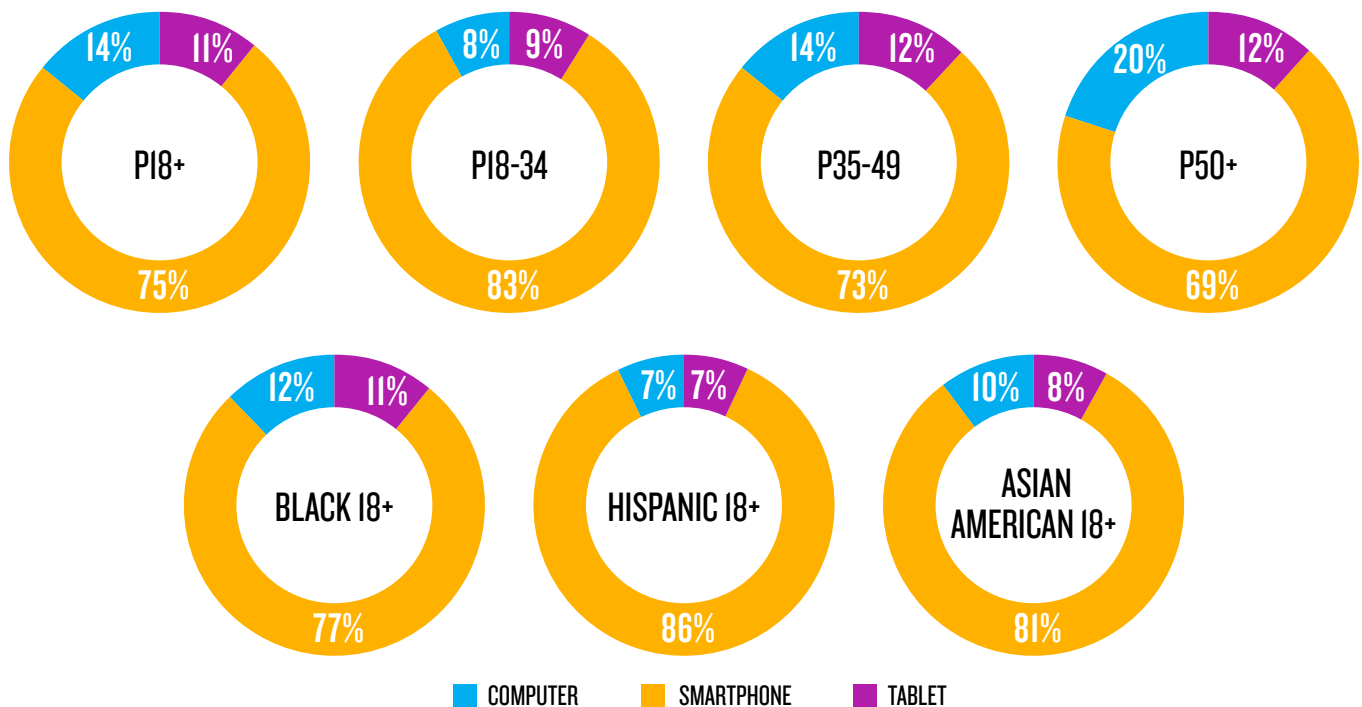


TIME PER PERSON PER DAY ON SOCIAL NETWORKING SITES & APPS

AMONG THE TOTAL POPULATION



SHARE OF SOCIAL MINUTES ACROSS DEVICES



- P35-49 in the total population are spending almost an hour a day on social networking sites and apps with three fourths of this usage coming from smartphones.
- P18-34 spend 52 minutes a day on social networking sites and apps with 83% of this usage coming from smartphones.

Source: Nielsen Netview (Computer), EMM (Smartphone & Tablet), June 2017, May vary slightly from 100% due to rounding



DATA TABLES

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

EXHIBIT 1 - BASED ON THE TOTAL U.S. POPULATION

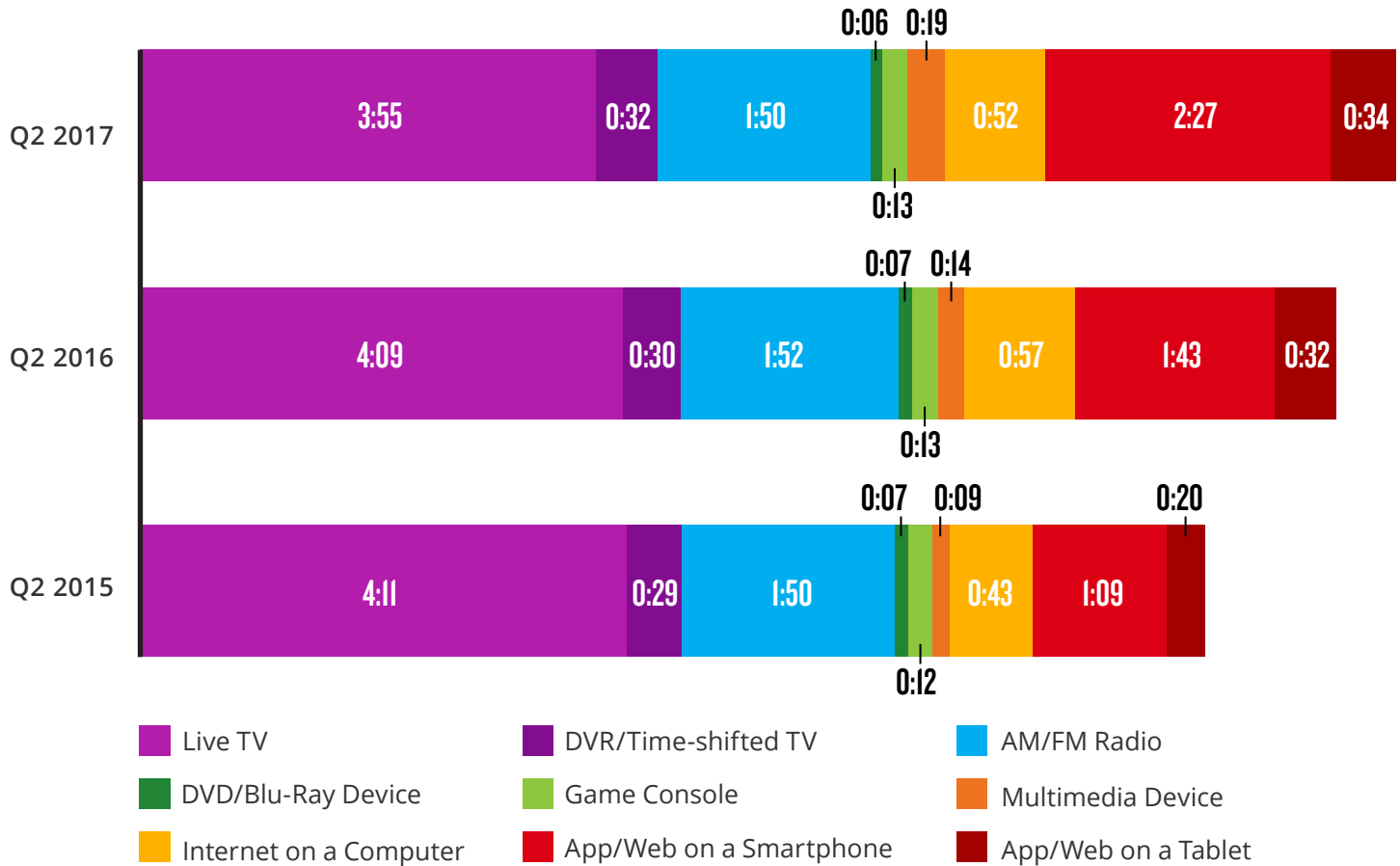


EXHIBIT 2 - BASED ON USERS OF EACH MEDIUM

	Q2 2015	Q2 2016	Q2 2017
Live+DVR/Time-shifted TV	6:22	6:13	5:56
DVR/Time-shifted TV	1:57	1:53	1:55
AM/FM Radio	2:42	2:44	2:43
DVD/Blu-Ray Device	1:37	1:47	1:48
Game Console	2:53	2:54	2:56
Multimedia Device	2:21	2:26	2:11
Internet on a Computer	2:11	3:07	2:52
App/Web on a Smartphone	1:58	2:29	2:59

The data sources in Exhibit 2 should not be added or subtracted; they are based on users of each medium and the bases vary by source. Panel enhancements made in March and August 2016 impacted mobile reporting.

TABLE IA – WEEKLY TIME SPENT IN HOURS: MINUTES AMONG U.S. POPULATION FOR Q2 2017

	Demo (Pop)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	Black Total	Hisp. Total	Asian Am. Total
Live+DVR/ Time-shifted TV	P2+	27:44	31:06	17:13	11:47	12:43	18:23	26:59	39:35	48:04	40:08	21:02	13:04
DVR/ Time-shifted TV	P2+	3:18	3:42	2:00	1:20	1:21	2:38	3:55	4:40	4:39	3:16	1:59	1:44
AM/FM Radio	P12+	12:15	12:48	n/a	6:51	9:52	10:54	13:28	15:11	12:22	12:56	12:58	n/a
DVD/Blu-Ray Device	P2+	0:46	0:42	1:11	0:40	0:30	0:43	0:53	0:46	0:33	0:45	0:40	0:27
Game Console	P2+	1:50	1:29	2:38	4:01	3:58	3:05	1:18	0:23	0:08	2:12	1:58	1:01
Multimedia Device	P2+	2:22	2:16	3:06	2:07	2:47	3:34	2:40	1:43	1:01	2:24	2:33	3:08
Internet on a Computer	P2+	4:51	6:04	0:13	0:32	2:57	5:56	8:07	7:03	4:20	4:58	3:00	3:04
Video on a Computer	P2+	1:57	2:19	0:30	0:35	2:35	3:19	3:27	1:41	0:44	2:44	1:34	1:36
App/Web on a Smartphone	P18+	17:13	17:13	n/a	n/a	20:18	17:51	20:36	21:38	4:46	20:20	19:47	14:18
Video on a Smartphone	P18+	0:50	0:50	n/a	n/a	1:31	1:12	0:59	0:40	0:06	1:22	1:28	0:49

Video on a Computer methodology has changed from prior reports. Video on a Smartphone is inclusive of video focused sites only. See Sourcing & Methodologies section for additional information.

TABLE IB – WEEKLY TIME SPENT IN HOURS: MINUTES AMONG U.S. POPULATION FOR Q2 2016

	Demo (Pop)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	Black Total	Hisp. Total	Asian Am. Total
Live+DVR/ Time-shifted TV	P2+	29:18	32:32	19:15	14:18	15:05	20:56	29:00	40:18	48:38	43:05	23:03	14:31
DVR/ Time-shifted TV	P2+	3:11	3:33	2:03	1:29	1:26	2:44	4:00	4:21	4:01	3:01	2:07	1:52
AM/FM Radio	P12+	12:30	13:04	n/a	7:01	10:24	11:20	13:42	15:15	12:37	12:53	13:08	n/a
DVD/Blu-Ray Device	P2+	0:55	0:51	1:22	0:47	0:42	0:57	1:01	0:52	0:38	0:59	0:52	0:35
Game Console	P2+	1:50	1:30	2:30	3:59	4:01	3:06	1:20	0:24	0:06	2:06	1:58	1:05
Multimedia Device	P2+	1:40	1:37	2:06	1:24	1:52	2:43	1:50	1:12	0:46	1:29	1:40	2:45
Internet on a Computer	P2+	5:21	6:41	0:16	0:41	4:14	7:40	8:23	7:39	3:58	5:52	3:42	3:35
Video on a Computer	P2+	1:33	1:49	0:32	0:38	1:59	2:49	2:12	1:33	0:39	2:21	1:26	1:16
App/Web on a Smartphone	P18+	12:01	12:01	n/a	n/a	15:45	13:46	14:48	13:10	2:54	12:47	14:31	10:27
Video on a Smartphone	P18+	0:24	0:24	n/a	n/a	0:52	0:31	0:27	0:17	IFR	0:40	0:44	0:28

TABLE 2A – USERS BY MEDIUM FOR Q2 2017
NUMBER OF USERS (IN 000'S) – MONTHLY REACH

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	Black Total	Hisp. Total	Asian Am. Total
Live+DVR/ Time-shifted TV	P2+	291,358	229,960	37,988	23,408	26,433	38,230	57,523	60,393	47,382	39,063	50,649	16,336
DVR/ Time-shifted TV	P2+	203,615	161,506	26,536	15,574	16,297	27,795	43,453	43,047	30,914	27,828	30,503	10,266
AM/FM Radio	P12+	267,263	243,381	n/a	23,877	29,818	42,641	60,112	62,714	48,873	34,535	44,628	n/a
DVD/Blu-Ray Device	P2+	95,634	72,972	15,297	7,365	5,856	10,388	20,979	21,380	14,369	10,440	14,200	4,349
Game Console	P2+	85,699	55,610	17,773	12,316	11,635	16,507	17,973	7,295	2,200	11,472	16,807	4,051
Multimedia Device	P2+	128,826	97,628	20,256	10,943	12,720	21,496	29,675	22,353	11,382	14,867	22,966	10,709
Internet on a Computer	P2+	177,668	160,095	9,178	8,395	15,681	28,530	45,093	43,952	26,839	22,470	23,337	6,351
Video on a Computer	P2+	111,544	102,349	4,933	4,263	9,866	18,022	29,768	27,903	16,725	15,009	14,115	4,505
App/Web on a Smartphone	P18+	207,659	207,659	n/a	n/a	29,263	38,902	59,219	67,116	13,160	25,554	35,194	12,062
Video on a Smartphone	P18+	168,789	168,789	n/a	n/a	24,968	32,465	49,134	52,986	9,236	22,464	30,187	9,301

TABLE 2B – USERS BY MEDIUM FOR Q2 2016
NUMBER OF USERS (IN 000'S) – MONTHLY REACH

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	Black Total	Hisp. Total	Asian Am. Total
Live+DVR/ Time-shifted TV	P2+	286,183	225,615	37,383	23,185	26,246	37,137	57,037	59,673	45,523	38,388	49,777	15,747
DVR/ Time-shifted TV	P2+	194,924	154,635	25,144	15,144	15,700	26,336	41,792	41,812	28,994	25,886	29,226	9,396
AM/FM Radio	P12+	263,717	239,854	n/a	23,862	29,804	41,890	59,951	61,984	46,903	33,977	43,477	n/a
DVD/Blu-Ray Device	P2+	112,839	86,133	17,706	9,000	7,678	13,078	24,918	24,782	15,676	13,208	18,149	5,036
Game Console	P2+	89,409	58,003	18,625	12,781	12,281	16,567	19,017	8,030	2,108	11,574	17,274	4,628
Multimedia Device	P2+	86,689	65,098	14,163	7,428	8,644	15,360	20,173	14,223	6,700	9,068	15,565	8,392
Internet on a Computer	P2+	179,346	159,405	10,530	9,410	16,043	28,730	45,803	43,665	25,164	22,364	23,100	6,582
Video on a Computer	P2+	121,026	109,609	6,176	5,240	10,352	19,275	31,389	31,086	17,507	15,372	14,863	4,664
App/Web on a Smartphone	P18+	202,324	202,324	n/a	n/a	29,055	38,649	58,587	62,978	13,055	24,883	34,643	11,885
Video on a Smartphone	P18+	156,531	156,531	n/a	n/a	24,452	30,734	47,452	45,519	8,373	19,589	27,286	8,936

TABLE 3A – PERCENTAGE OF USERS AMONG U.S. POPULATION FOR Q2 2017
MONTHLY REACH

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	Black Total	Hisp. Total	Asian Am. Total
Live+DVR/ Time-shifted TV	P2+	93%	94%	93%	93%	86%	90%	95%	96%	97%	95%	96%	83%
DVR/ Time-shifted TV	P2+	65%	66%	65%	62%	53%	65%	72%	69%	63%	68%	58%	52%
AM/FM Radio	P12+	97%	97%	n/a	94%	94%	98%	97%	99%	97%	97%	98%	n/a
DVD/Blu-Ray Device	P2+	31%	30%	37%	29%	19%	24%	35%	34%	29%	25%	27%	22%
Game Console	P2+	28%	23%	44%	49%	38%	39%	30%	12%	5%	28%	32%	21%
Multimedia Device	P2+	41%	40%	50%	44%	41%	50%	49%	36%	23%	36%	43%	55%
Internet on a Computer	P2+	57%	65%	22%	34%	51%	67%	74%	70%	55%	55%	44%	32%
Video on a Computer	P2+	36%	42%	12%	17%	32%	42%	49%	44%	34%	37%	27%	23%
App/Web on a Smartphone	P18+	85%	85%	n/a	n/a	95%	91%	97%	99%	28%	91%	92%	99%
Video on a Smartphone	P18+	69%	69%	n/a	n/a	81%	76%	81%	82%	20%	80%	78%	76%

Total Universe Estimates differ by platform.

TABLE 3B – PERCENTAGE OF USERS AMONG U.S. POPULATION FOR Q2 2016
MONTHLY REACH

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	Black Total	Hisp. Total	Asian Am. Total
Live+DVR/ Time-shifted TV	P2+	93%	93%	92%	92%	85%	89%	94%	96%	97%	94%	96%	85%
DVR/ Time-shifted TV	P2+	63%	64%	62%	60%	51%	63%	69%	67%	62%	64%	56%	51%
AM/FM Radio	P12+	97%	97%	n/a	95%	95%	98%	98%	99%	97%	97%	98%	n/a
DVD/Blu-Ray Device	P2+	37%	35%	43%	36%	25%	31%	41%	40%	33%	32%	35%	27%
Game Console	P2+	29%	24%	46%	51%	40%	39%	31%	13%	4%	28%	33%	25%
Multimedia Device	P2+	28%	27%	35%	30%	28%	37%	33%	23%	14%	22%	30%	45%
Internet on a Computer	P2+	58%	66%	26%	38%	52%	68%	75%	70%	53%	55%	44%	36%
Video on a Computer	P2+	39%	45%	15%	21%	34%	46%	52%	50%	37%	38%	29%	25%
App/Web on a Smartphone	P18+	83%	83%	n/a	n/a	95%	91%	96%	97%	29%	92%	94%	99%
Video on a Smartphone	P18+	64%	64%	n/a	n/a	80%	72%	78%	70%	19%	72%	74%	76%

Total Universe Estimates differ by platform.

TABLE 4A – MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS FOR Q2 2017

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	Black Total	Hisp. Total	Asian Am. Total
Live+DVR/ Time-shifted TV	P2+	128:31	144:01	80:12	54:39	64:21	88:42	123:29	178:27	214:07	183:00	95:24	68:01
DVR/ Time-shifted TV	P2+	21:50	24:27	13:20	9:16	11:07	17:26	23:44	29:29	31:47	20:53	14:58	14:23
AM/FM Radio	P12+	54:04	56:18	n/a	31:18	44:30	47:26	59:15	66:16	53:41	56:30	54:22	n/a
DVD/Blu-Ray Device	P2+	10:50	10:19	13:46	9:55	11:15	12:51	10:59	9:41	8:03	12:51	10:49	8:43
Game Console	P2+	28:53	28:17	26:12	35:25	45:39	34:33	19:00	14:02	12:43	34:14	26:50	21:10
Multimedia Device	P2+	24:47	24:44	27:06	20:56	29:15	30:39	23:40	20:52	18:50	28:44	25:27	24:51
Internet on a Computer	P2+	36:26	39:49	4:14	6:57	24:41	37:46	46:48	43:11	33:38	38:48	29:12	40:38
Video on a Computer	P2+	23:31	24:10	17:43	14:46	34:15	33:27	30:55	16:28	9:28	31:47	25:48	30:37
App/Web on a Smartphone	P18+	79:57	79:57	n/a	n/a	82:58	75:52	82:57	80:19	69:50	96:31	82:24	71:19
Video on a Smartphone	P18+	4:45	4:45	n/a	n/a	7:19	6:11	4:47	3:08	1:50	7:27	7:03	5:10

The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

TABLE 4B – MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS FOR Q2 2016

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	Black Total	Hisp. Total	Asian Am. Total
Live+DVR/ Time-shifted TV	P2+	137:04	151:53	91:04	67:05	76:55	102:31	133:44	182:35	217:52	197:51	104:36	73:54
DVR/ Time-shifted TV	P2+	21:51	24:09	14:26	10:41	12:09	18:54	25:11	28:07	28:13	20:31	16:21	15:55
AM/FM Radio	P12+	55:01	57:32	n/a	31:56	46:40	49:09	60:03	66:28	54:49	56:38	55:27	n/a
DVD/Blu-Ray Device	P2+	10:50	10:24	13:43	9:23	12:06	13:06	10:44	9:32	8:08	13:13	10:45	9:12
Game Console	P2+	27:29	27:15	23:44	33:57	43:50	33:58	18:28	13:18	10:19	31:54	25:48	18:51
Multimedia Device	P2+	25:42	26:12	26:14	20:24	28:47	32:07	23:54	22:46	23:25	28:45	24:06	26:15
Internet on a Computer	P2+	39:35	43:47	4:37	7:45	34:54	48:11	47:29	47:02	32:02	45:47	35:45	43:21
Video on a Computer	P2+	16:57	17:14	15:16	12:58	25:22	26:07	18:17	13:25	7:36	26:24	21:41	21:32
App/Web on a Smartphone	P18+	59:46	59:46	n/a	n/a	69:00	61:56	63:38	53:52	43:49	64:30	63:55	53:09
Video on a Smartphone	P18+	2:31	2:31	n/a	n/a	4:32	2:54	2:19	1:40	0:58	4:21	4:07	3:09

The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

**TABLE 4C – MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS FOR Q2 2017
AMONG BLACK**

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+
Live+DVR/ Time-shifted TV	P2+	183:00	206:47	121:21	92:46	112:30	140:05	191:00	262:11	312:07
DVR/ Time-shifted TV	P2+	20:53	23:35	13:32	11:01	13:59	19:17	26:52	29:03	21:57
AM/FM Radio	P12+	56:30	59:15	n/a	34:18	45:33	48:27	62:02	72:14	60:49
DVD/Blu-Ray Device	P2+	12:51	12:18	15:49	12:26	16:11	14:02	13:01	11:35	8:42
Game Console	P2+	34:14	33:19	29:06	45:35	55:59	36:27	22:37	17:53	16:38
Multimedia Device	P2+	28:44	29:27	28:24	23:57	35:17	34:40	29:13	23:59	19:06
Internet on a Computer	P2+	38:48	42:36	4:33	6:58	29:57	40:00	52:57	43:13	31:30
Video on a Computer	P2+	31:47	33:32	14:04	11:05	45:25	46:46	36:01	26:48	9:17
App/Web on a Smartphone	P18+	96:31	96:31	n/a	n/a	96:54	98:18	100:52	93:20	IFR
Video on a Smartphone	P18+	7:27	7:27	n/a	n/a	11:40	9:15	7:30	5:04	IFR

The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

**TABLE 4D – MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS FOR Q2 2017
AMONG HISPANIC**

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+
Live+DVR/ Time-shifted TV	P2+	95:24	107:28	75:27	48:02	52:14	75:50	106:36	149:00	194:57
DVR/ Time-shifted TV	P2+	14:58	16:43	11:48	8:08	8:22	13:28	17:31	23:02	24:11
AM/FM Radio	P12+	54:22	57:37	n/a	32:07	44:51	51:19	64:13	69:18	56:33
DVD/Blu-Ray Device	P2+	10:49	9:59	13:33	10:21	9:21	10:57	9:45	9:48	9:31
Game Console	P2+	26:50	25:35	25:19	34:12	39:54	27:44	15:48	12:34	15:29
Multimedia Device	P2+	25:27	24:24	29:25	25:02	27:04	27:13	22:51	21:20	19:11
Internet on a Computer	P2+	29:12	33:31	4:01	9:16	20:56	35:17	40:10	31:58	33:23
Video on a Computer	P2+	25:48	27:34	15:22	15:00	27:41	28:14	32:06	21:13	15:20
App/Web on a Smartphone	P18+	82:24	82:24	n/a	n/a	87:15	81:39	84:53	79:20	IFR
Video on a Smartphone	P18+	7:03	7:03	n/a	n/a	8:59	7:35	6:53	4:53	IFR

The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

**TABLE 4E – MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS FOR Q2 2017
AMONG ASIAN AMERICAN**

	Demo (Users)	Total	A 18+	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+
Live+DVR/ Time-shifted TV	P2+	68:01	76:47	41:23	26:06	30:47	47:35	64:57	97:09	131:17
DVR/ Time-shifted TV	P2+	14:23	16:05	9:03	6:17	7:38	13:34	14:35	23:21	14:49
DVD/Blu-Ray Device	P2+	8:43	8:40	9:21	8:08	13:02	13:48	7:35	6:48	8:14
Game Console	P2+	21:10	21:45	17:44	22:55	29:46	29:41	17:54	10:16	8:09
Multimedia Device	P2+	24:51	25:46	24:41	16:42	25:02	27:13	22:07	26:22	36:02
Internet on a Computer	P2+	40:38	44:22	IFR	IFR	32:05	49:40	55:30	32:25	31:22
Video on a Computer	P2+	30:37	32:02	IFR	IFR	36:07	39:14	37:54	16:41	12:38
App/Web on a Smartphone	P18+	71:19	71:19	n/a	n/a	72:04	71:50	66:52	IFR	IFR
Video on a Smartphone	P18+	5:10	5:10	n/a	n/a	6:58	5:57	3:09	IFR	IFR

The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.

TABLE 5 – TELEVISION DISTRIBUTION SOURCES
NUMBER OF HOUSEHOLDS (IN 000'S)

	Composite		Black		Hispanic		Asian American	
	Q2 2016	Q2 2017	Q2 2016	Q2 2017	Q2 2016	Q2 2017	Q2 2016	Q2 2017
Broadcast	13,610	15,749	2,396	2,799	2,621	3,197	852	892
Total Multichannel*	98,690	97,860	12,565	12,285	12,055	11,760	4,145	4,417
Wired Cable (No Telco)	53,401	51,766	7,040	6,647	5,738	5,869	2,302	2,389
Telco	11,208	9,681	1,759	1,571	1,170	954	750	785
Satellite	34,116	35,284	3,750	3,916	5,168	4,845	1,115	1,150
Broadband Only	4,100	5,941	272	630	434	775	438	587

Table 5 is based on weighted intab counts. Breaks are not mutually exclusive.

*Total Multichannel is inclusive of Wired Cable, Telco, Satellite, and Virtual Providers. Virtual Providers only included for Q2 2017.

TABLE 6 – TELEVISION DISTRIBUTION SOURCES BY ETHNICITY
PERCENTAGE OF HOUSEHOLDS

	Composite	Black	Hispanic	Asian American
Broadcast	13%	17%	20%	15%
Total Multichannel	83%	80%	76%	76%
Wired Cable (No Telco)	44%	43%	37%	41%
Telco	8%	11%	7%	13%
Satellite	30%	26%	31%	20%
Broadband Only	5%	4%	5%	10%

Total Multichannel is inclusive of Wired Cable, Telco, Satellite, and Virtual Providers. Virtual Providers only included for Q2 2017.

TABLE 7 – PROVIDER TYPE WITH INTERNET STATUS
NUMBER OF HOUSEHOLDS (IN 000'S)

	Composite		Black		Hispanic		Asian American	
	Q2 2016	Q2 2017	Q2 2016	Q2 2017	Q2 2016	Q2 2017	Q2 2016	Q2 2017
Broadcast and Broadband Access	7,726	9,384	778	1,052	1,162	1,536	696	775
Broadcast and No Internet/Dial-Up Access	5,884	6,365	1,618	1,747	1,459	1,661	156	117
Total Multichannel and Broadband Access	79,451	80,057	8,828	8,817	8,717	8,598	3,832	4,173
Total Multichannel and No Internet/Dial-Up Access	19,239	17,803	3,736	3,471	3,337	3,163	313	244

Table 7 is based on weighted intab counts.

Total Multichannel is inclusive of Wired Cable, Telco, Satellite, and Virtual Providers. Virtual Providers only included for Q2 2017.

TABLE 8 – DEVICES IN TV HOUSEHOLDS
PERCENTAGE OF HOUSEHOLDS

	Composite		Black		Hispanic		Asian American	
	Q2 2016	Q2 2017	Q2 2016	Q2 2017	Q2 2016	Q2 2017	Q2 2016	Q2 2017
DVD/Blu-Ray Player	76%	72%	73%	67%	71%	64%	67%	59%
DVR	51%	54%	48%	52%	45%	47%	42%	47%
Enabled Smart TV	24%	31%	20%	27%	28%	36%	34%	45%
High Definition TV	94%	96%	91%	94%	96%	97%	97%	99%
Multimedia Device	27%	33%	22%	32%	28%	36%	49%	54%
Smartphone	83%	87%	85%	89%	92%	94%	93%	95%
Subscription Video on Demand	53%	59%	44%	50%	54%	60%	66%	71%
Tablet	60%	63%	54%	56%	61%	64%	73%	76%
Video Game Console	44%	43%	44%	43%	54%	52%	48%	46%



SOURCING AND METHODOLOGIES

GLOSSARY

AM/FM Radio: Listening to programming from AM/FM radio stations or network programming.

Broadband Access: Paid, high-speed Internet access delivered via DSL, Cable Internet through cable provider, Fiber-Optic Service, U-Verse, Satellite Internet, Data Card (aircard that connects to a cellular phone network) or Computer tethered to cell phone (cellular phone network).

Broadband Only: A household with at least one operable TV/monitor that receives video exclusively through a broadband internet connection instead of traditional means (over-the-air, wired cable, telco, satellite).

Broadcast: A mode of television content delivery that does not involve satellite transmission or cables (i.e.—a paid service). Also commonly referred to as “over-the-air.”

Dial-Up: A household that accesses the Internet via a telephone line.

Enabled Smart TV: A household with at least one television set that is capable and enabled to access the internet.

Multimedia Device: Viewing on an Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. connected to the TV.

Satellite: A paid TV subscription where the signal is distributed to an orbiting satellite. The amplified signal is then re-transmitted to the home and received via a dish. (Sometimes also referred to as “dish.”)

Subscription Video on Demand (SVOD): A household with access to a subscription video on demand service, such as Netflix, Amazon Prime and Hulu Plus.

Telco: A paid TV subscription delivered fiber-optically via a traditional telephone provider.

Total Multichannel: Inclusive of Traditional Cable Plus as well as homes that have a virtual provider.

Traditional Cable Plus: Inclusive of Wired Cable, Telco, and Satellite. Broadband Only Homes would be not included.

TV Household: A home with at least one operable TV/monitor with the ability to deliver video via traditional means of antennae, cable STB or Satellite receiver and/or with a broadband connection.

Virtual Providers: A household that can watch TV programming through a virtual provider, including Sling TV, Sony VUE, and DirecTV Now, as delivered on a TV set.

Wired Cable: Traditional cable delivered through wires to your home.

DIGITAL AUDIENCE MEASUREMENT

THE FOLLOWING TABLE PROVIDES ADDITIONAL DETAIL ON WHAT IS AND IS NOT INCLUDED IN DIGITAL MEASUREMENT WITHIN THIS REPORT.

	Includes	Does Not Include
Internet on a Computer	Computer measurement of URLs and Internet Applications	Non-browser requested URLs on Internet Applications such as office apps, most games and email apps, banking information, private/incognito browsing
Video on a Computer	Both active (tagged) and passive (non-tagged) publisher measurement	Untagged content where audio is not present.
App/Web on a Smartphone	Android: all app/web activity, measured passively iOS: all activity routed through an http and https proxy for both app and browser URLs	iOS apps with no http/https activity (Ex. Calculator, Notes) Email activity through the standard Mail app for iOS Standard text messaging is not included
Video on a Smartphone	Apps and sites specifically designed to view video content (Ex. Netflix, HBOGO)	Video content available through apps/web where video is not the primary focus (Ex. CNN, Weather Channel, Facebook)
App/Web on a Tablet	iOS: all activity routed through an http and https proxy for both app and browser URLs	Android tablets, iOS apps with no http/https activity mail activity through the standard Mail app for iOS Standard text messaging is not included

TELEVISION METHODOLOGY

Live+DVR/Time-shifted TV includes Live usage plus any playback viewing 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) would include content being viewed on the TV screen through these devices. This would include 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 sources. It would include viewing on an Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/ Laptop, etc. connected to the TV unless otherwise noted.

Reach for television and TV-connected devices includes those viewing at least one minute within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

AM/FM RADIO METHODOLOGY

Audience estimates for 48 large markets are based on a panel of people who carry a portable device called a Personal People Meter (PPM) that passively detects exposure to content that contains inaudible codes embedded within the program content. Audience estimates from the balance of markets and countries in the U.S. are based on surveys of people who record their listening in a written diary for a week.

The estimates in this report are based on RADAR and the National Regional Database. RADAR reports national network radio ratings covering the U.S. using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents aged 12+ per year. The Q2 2017 report is based on the September RADAR studies.

Monthly Radio Estimates: Nielsen's Measurement Science group used statistical modeling techniques to estimate the total cume audience to radio in a four week period, as compared to the total cume audience to radio in an average week. The methodology utilized PPM panel data, and essentially measured how many people who were not exposed to radio in a single week might typically be exposed to radio over a consecutive four week period. A radio cume growth factor was then determined and applied to radio listening on a national basis.

Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included in the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements of at least 5 minutes of usage. Reach for AM/FM Radio includes those listening for at least 5 minutes within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

COMPUTER METHODOLOGY

Nielsen Netview and VideoCensus data is reflective of the hybrid methodology which combines a census level accounting of page views and video streams where Nielsen measurement tags have been deployed in order to project audience and behavior to the full universe of all Internet users. For VideoCensus, the portion of the total video streams calibrated by census data, previously allocated to Home/Work computers, are allocated to other devices and locations outside of home and work. Nielsen's Online Panel is recruited in Spanish and English.

Internet on a Computer metrics are derived from Nielsen Netview. Video on a Computer metrics are derived from Nielsen VideoCensus. As some reported brands transition to Digital Content Ratings, they are no longer reported in VideoCensus as of Q2 2017. Accordingly, the methodology and computation of these metrics has been adjusted. Fusion data from Nielsen Media Impact (derived from panel and census data) was used to create a percent change from Q1 2017 to Q2 2017 for Video on a Computer. The percent change was then applied to the Q1 2017 VideoCensus data to calculate Q2 2017 metrics.

MOBILE METHODOLOGY

Nielsen's Electronic Mobile Measurement (EMM) is an observational, user-centric approach that uses passive metering technology on smartphones and tablets to track device and application usage on an opt-in convenience panel, recruited online in English and recently in Spanish as well. There may be limited representation of non-English language audiences as recruitment is ramped up. The smartphone sample was around 12,500 and the tablet sample was around 3,250 during Q2 2017. This method provides a holistic view of all activity on the device as the behavior is being tracked without interruption.

A number of steps are taken after the data collection process to ensure the reported data is representative of the mobile population. For smartphones, weighting controls are applied across five characteristics (gender, age, income, race, and ethnicity) while independent enumeration studies are carried out on a continuous basis to provide the most current estimates of the mobile population (aka Universe Estimation).

Tablet data is unweighted and projections are applied using estimates from the National Panel that is the industry standard for TV ratings.

App/Web refers to consuming mobile media content through a web browser or via a mobile app. It does not include other types of activity such as making/receiving phone calls, sending SMS/MMS messages etc, which has been excluded for this report.

Video is a subset of App/Web and refers to those individuals who visit a website or use a mobile app specifically designed to watch video content.

Nielsen implemented a crediting enhancement to improve the reporting of mobile usage on iOS devices in March 2016 and Android devices in August 2016. A legacy crediting rule that limited usage at 30 minutes was removed, so now if a panelist uses an app or visits a website for more than 30 minutes at a time the entire duration is now credited towards the app or website. There are no minimum qualifiers; crediting begins when the site or app is loaded in the foreground of the device.

SOURCING

EXHIBIT 1, 2 & TABLES 1, 2, 3, 4 – AVERAGE TIME SPENT PER ADULT 18+ PER DAY, WEEKLY TIME SPENT AMONG US POPULATION, USERS BY MEDIUM, PERCENTAGE OF USERS, MONTHLY TIME SPENT AMONG USERS

Source: Live+DVR/Time-shifted TV, DVR/Time-shifted TV, DVD, Game Consoles, Multimedia Devices 03/27/2017 - 06/25/2017 via Nielsen NPOWER/National Panel, Radio 06/16/16-06/21/17 via RADAR 134 and Radio Nationwide Spring 2017, Computer 04/01/2017 - 06/30/2017 via Nielsen Netview and Nielsen VideoCensus, Smartphone 04/01/2017 - 06/30/2017 via Nielsen Electronic Mobile Measurement, Tablet 04/01/2017 - 06/30/2017 via Nielsen Electronic Mobile Measurement – unweighted, projections based on estimates from the NPOWER/National Panel.

Exhibit 1 and Table 1 are based on the total U.S. population whether or not they have the technology.

Exhibit 2 and Tables 2-4 are based on users of each medium.

Table 3 percentage of users is based on the users by medium out of the Nielsen total universe estimates. Due to variations in sources, radio is based on the RADAR universe estimates and mobile is based on the Mobile Insights universe estimates. All other sources are based on the total universe estimates

To more accurately reflect included data, source names have been adjusted from PC to Computer.

IFR represents data that is insufficient for reporting due to small sample sizes. n/a represents data unavailability.

TABLE 5 – TELEVISION DISTRIBUTION SOURCES

Source: Based on the weighted intab counts for the 15th of each month within the quarter via Nielsen NPOWER/National Panel.

TABLE 6 – TELEVISION DISTRIBUTION SOURCES BY ETHNICITY

Source: Based on the scaled installed counts for the 15th of each month within the quarter via Nielsen NPOWER/National Panel.

TABLE 7 – PROVIDER TYPE WITH INTERNET STATUS

Source: Based on the weighted intab counts for the 15th of each month within the quarter via Nielsen NPOWER/National Panel. Broadband access is inclusive of Unknown status.

TABLE 8 – DEVICES IN TV HOUSEHOLDS

Source: Based on the scaled installed counts for the 15th of each month within the quarter via Nielsen NPOWER/National Panel.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Nielsen Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, 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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