THE NIELSEN TOTAL AUDIENCE REPORT

Q1 2018

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AUDIENCE INSIGHTS

Which came first—more consumer choices that drove fundamental shifts in our media behavior or lifestyle changes that begged for new technologies that fit the new way we now live our lives? Perhaps a little of both?

Either way, consumers in today's fragmented media landscape have so many ways to discover content that matters to them. This plethora of options is shaping behavior, too, as the ability to choose the source, device, location and time becomes more and more tailored. With each passing day, consumers are able to further customize their own media usage into an individualized experience akin to a media DNA, each consumer with an ability for complete personalization.

Using proven science to understand consumer media behavior is something Nielsen is unrivaled at doing. This is especially true when we look at shifting behaviors beyond the here and now. In this re-imagined Nielsen Total Audience Report, we're focused on telling the story of what's currently happening across the media landscape for the U.S. consumer. The report examines overall media usage across linear (television and radio) and digital platforms, reviews consumer access to devices and services, digs deeper into TV-connected device use, explores usage differences across various ages and race/ethnicities, and provides insights into households not considered television homes.

HIGHLIGHTS FROM THIS Q1 2018 SUMMARY INCLUDE:

- 92% of U.S. adults listen to radio each week, the highest reach across platforms.
- On average, U.S. adults are spending over 11 hours a day connected to linear and digital media and almost six hours a day with video alone.
- Young adults 18-34 spend the largest percentage of time with TV-connected devices and digital devices compared to other demographics.
- Black adults are the heaviest users of media overall. Compared to overall U.S., Hispanics listen to more radio, and Asian Americans spend more time with computers and tablets.
- Nearly 3% of TV homes subscribe to a virtual multichannel video programming distributor (vMVPD).
- Almost 20% of consumers use a smart speaker in the household.
- Two-thirds of U.S. TV households have devices capable of streaming content to the TV set.
- One out of 10 minutes of television use in streaming capable homes is streaming to the TV set.
- Over eight in 10 non-television households still view video content.

With the evolving media landscape, we have also made advancements in our measurement solutions and this progress is represented throughout the report. The Nielsen Total Audience Report now uses our cross-platform respondent-level data set, Total Media Fusion, to report on computer, smartphone and tablet measurement as it best reflects digital activity as a whole. To this extent, the more comprehensive and upgraded digital data is not comparable to past reports but will be trended on a go-forward basis. Year-over-year comparisons will be made available once a full year of data with common methodology is established. More details on sources and methodologies used within the report can be found in the appendix.

We are excited about the content on the pages that follow and are confident that these unparalleled insights will help provoke thought, influence decisioning and foster industry conversation as a way to drive positive outcomes.

Thanks,

Peter

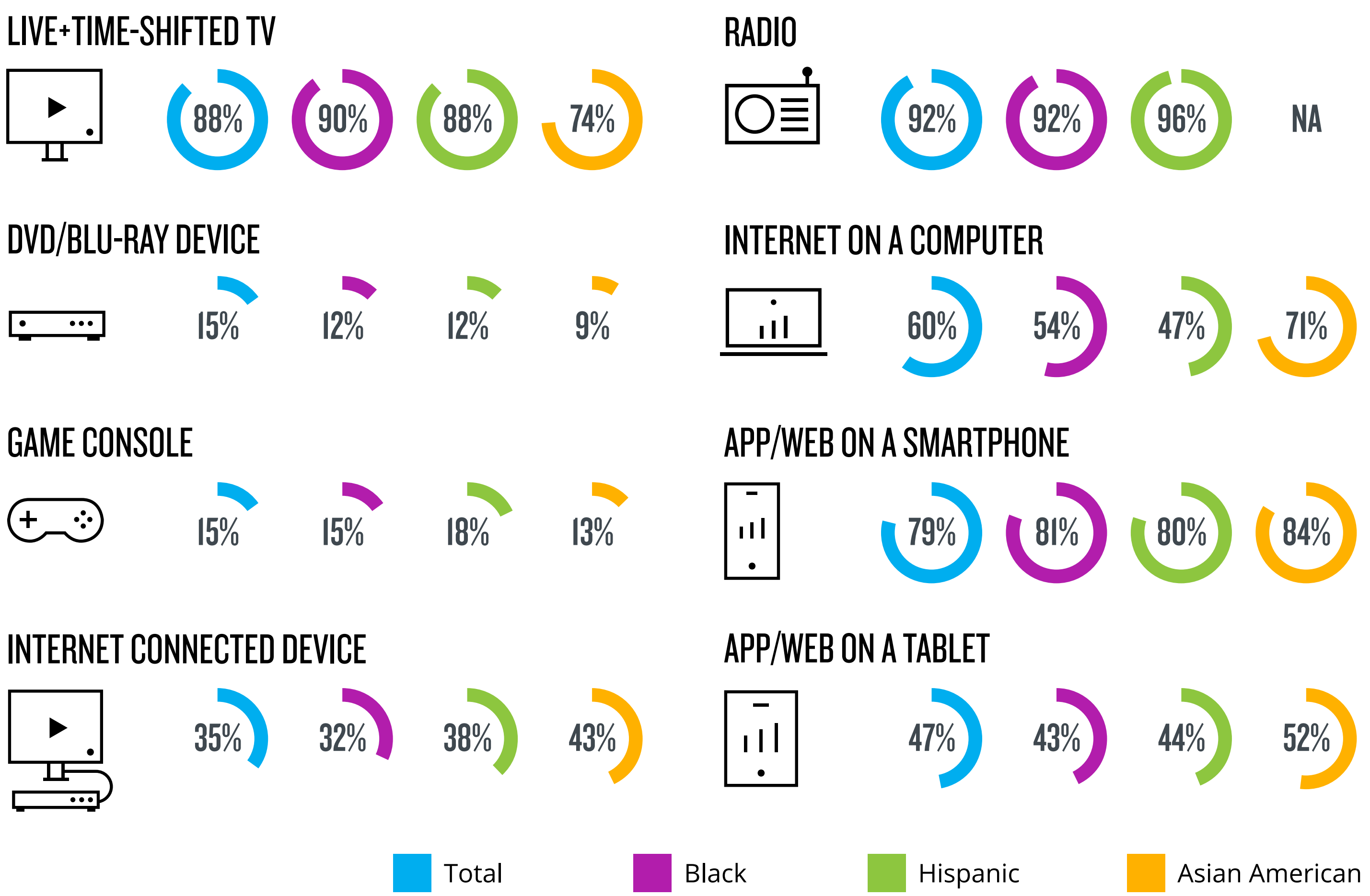
WEEKLY REACH ACROSS PLATFORMS

Nine out of 10 U.S. adults (18+) use linear platforms in the average week. Live+Time-shifted TV viewing reached 88% of persons in Q1 2018, while radio had the largest reach across platforms at 92%. Radio also reaches 96% of all Hispanic adults each week.

Over a third of persons use their internet connected devices (including apps on their smart TVs) during the average week, with a higher reach of 43% for Asian Americans. Computer reach is highest with Asian Americans as well, with 71% using the device weekly. Regardless of race or ethnicity, smartphones remain universally popular, reaching four out of five adults while tablets are used by less than half of all adults weekly.

92% OF ADULTS LISTEN TO RADIO DURING THE AVERAGE WEEK

Q1 2018 WEEKLY REACH % OF USERS 18+ AMONG U.S. POPULATION



P18+ Total Universe (millions)	247	31	39	16
% of P18+ Total Universe		13%	16%	7%

Radio measurement includes Asian Americans but cannot be separated from the total audience at this time

MEDIA CONNECTED CONSUMERS

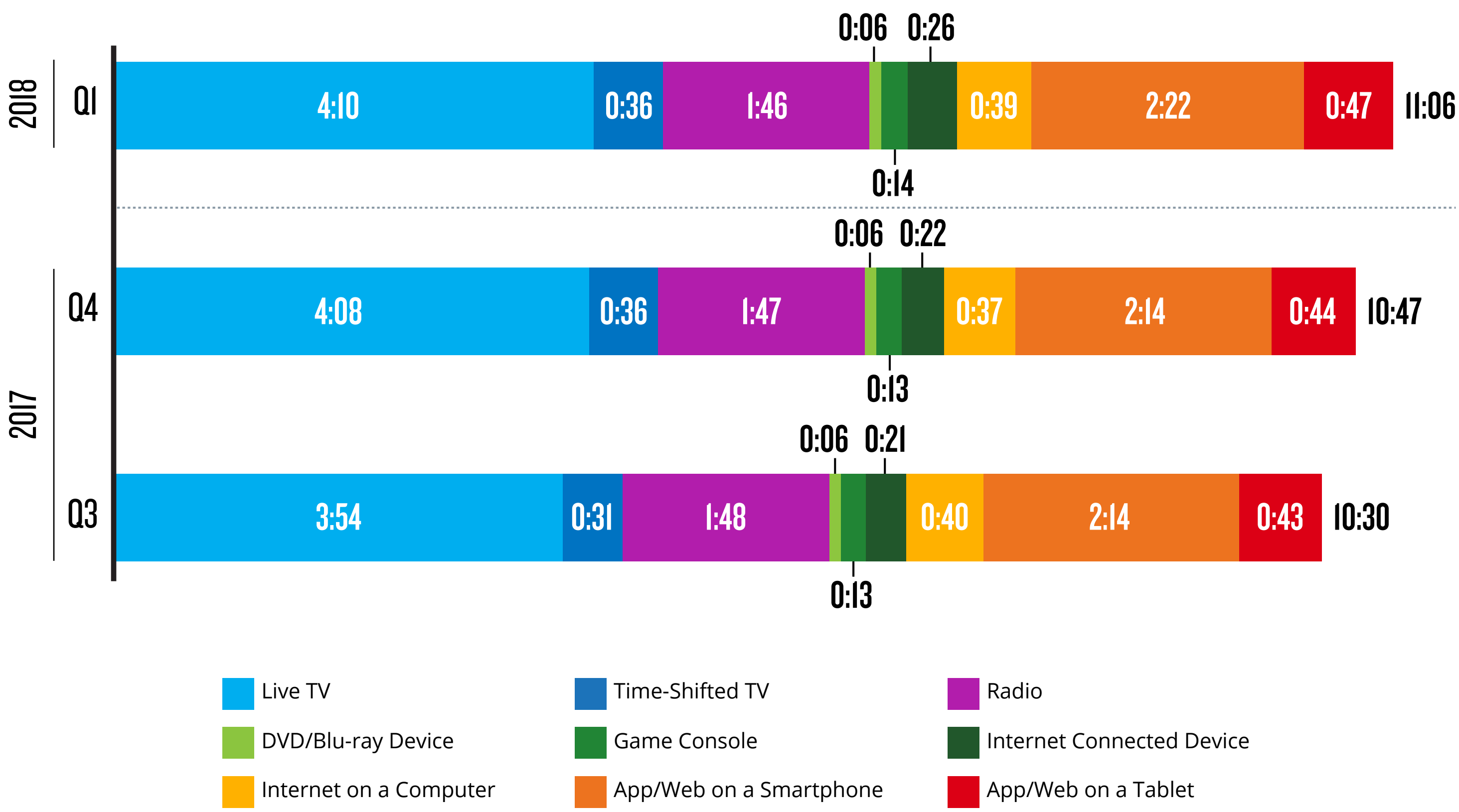
U.S. adults are spending nearly half a day—over 11 hours—listening to, watching, reading or generally interacting with media. Time spent across all media in Q1 2018 increased 19 minutes from the prior quarter. This increase in media time is driven by more time on TV-connected devices (+5 minutes) and with digital platforms (+13 minutes). Live+Time-shifted TV viewing remained relatively flat at four hours and 46 minutes a day. Note that seasonality plays a role with quarterly television usage trends, particularly as people transition from holiday breaks and the occurrence of several marquee sporting events, such as the Olympics and the Super Bowl. Radio usage was one hour and 46 minutes in Q1 2018, trending consistently with prior quarters.

Digital usage across computer, smartphone, and tablet continue to play a growing role with the adult U.S. consumer. In Q1 2018, three hours and 48 minutes a day were spent on digital, with app/web usage on smartphone accounting for 62% of that time.

U.S. ADULTS SPEND OVER 11 HOURS PER DAY CONNECTED TO MEDIA

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION

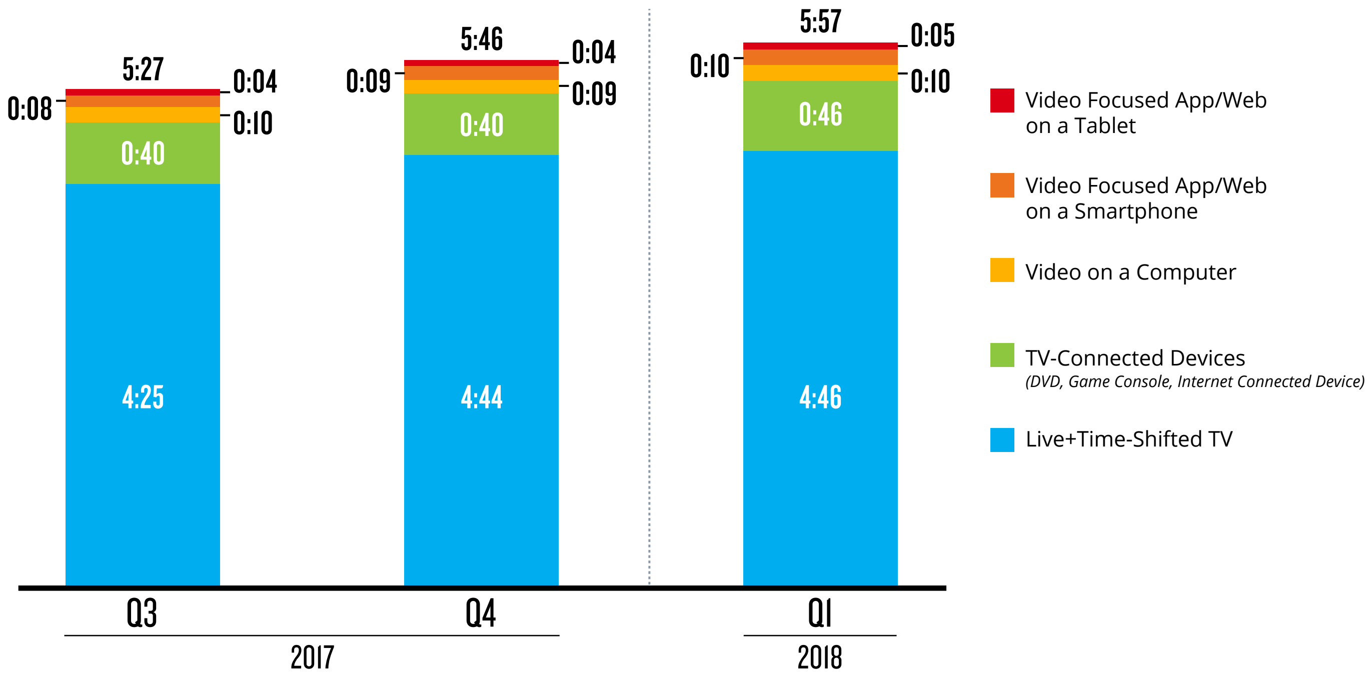


Note: Some amount of simultaneous usage may occur across devices.

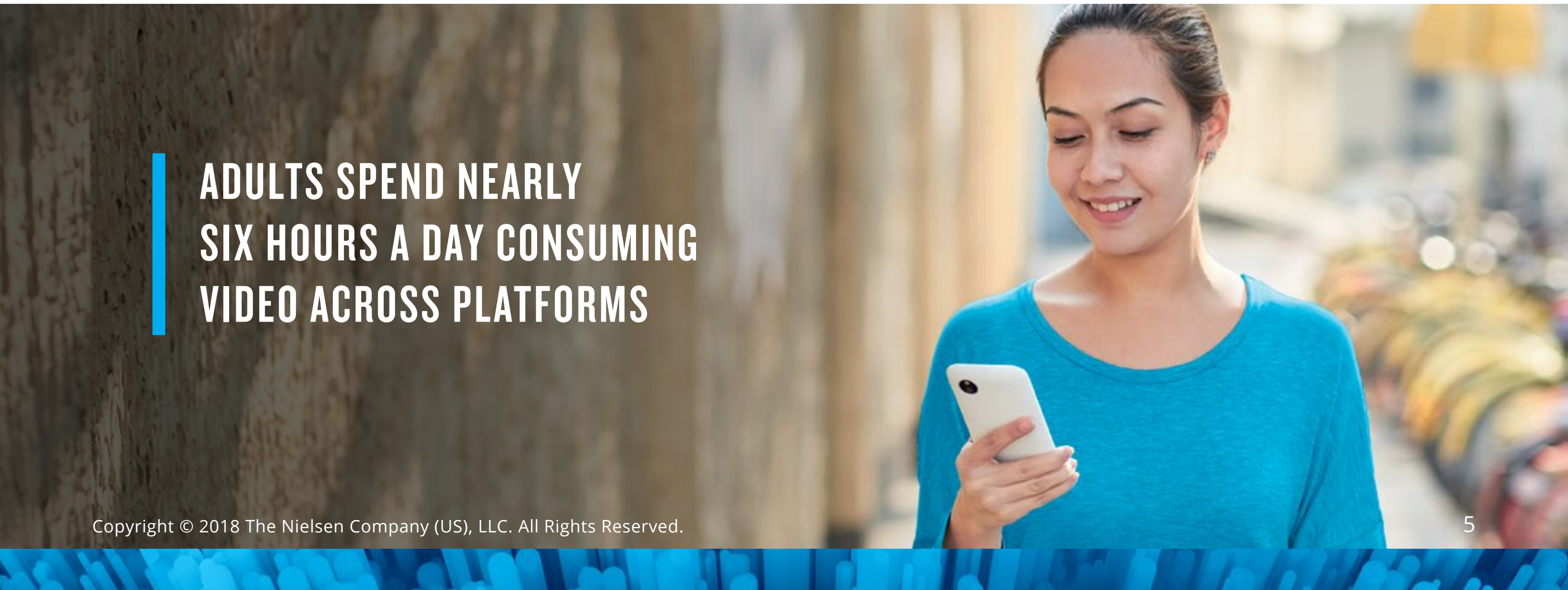
Overall video use—time spent with a TV set, computer video, and using video focused app/web on smartphones/tablets—for adults nets out to almost six hours a day, with consumers picking the platform that best meets their needs for watching content. Time spent with television and digital video increased 11 minutes per day in Q1 2018 compared to the prior quarter. Live+Time-shifted TV viewing has increased two minutes, while TV-connected device usage increased six minutes to 46 minutes a day. Video consumption on a smartphone increased one minute from Q4 2017 and two minutes from Q3 2017, while video on a tablet also increased to five minutes a day in Q1 2018.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

BASED ON TOTAL U.S. POPULATION



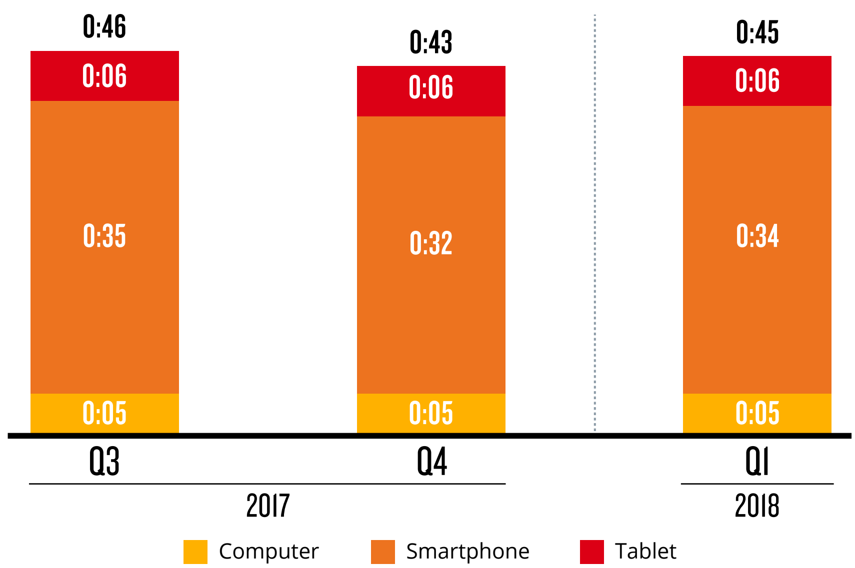
It is important to note that video on a smartphone and tablet only comprises apps and websites whose primary purpose is streaming and video content; there is a portion of digital video content that is not being included here but this provides insight into the amount of video focused content on these devices. Additionally, time-shifted TV viewing is comprised of DVR usage as well as any time spent watching encoded/measurable video on demand either through their service provider or other subscription-based services.



Consumers continue to lean into the immediacy of engaging with social media. It has already reshaped the way people connect with each other, but social networks are now beginning to affect the content landscape too as the major platforms begin to strike licensing deals for premium content.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON SOCIAL NETWORKING

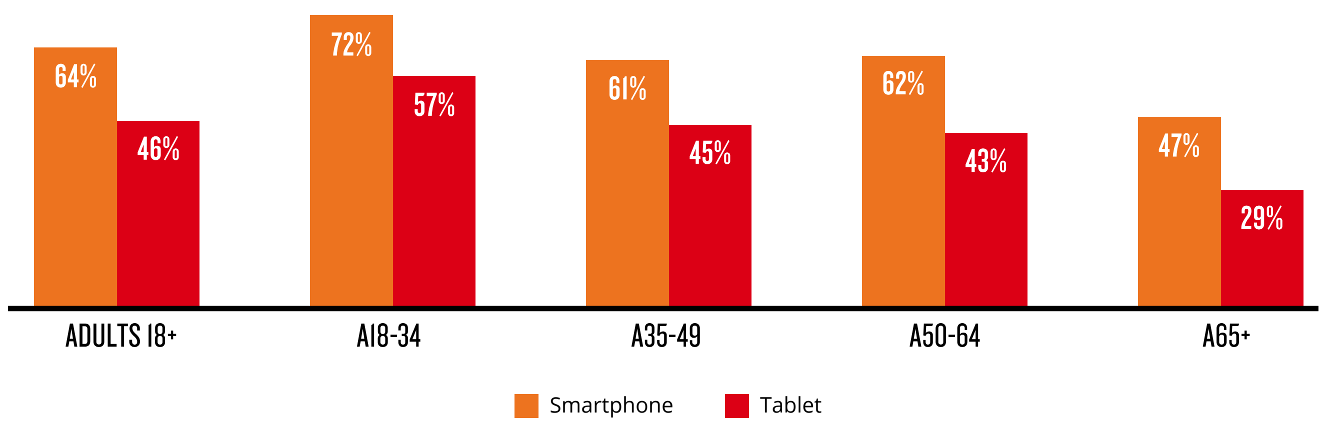
BASED ON TOTAL U.S. POPULATION



ADULTS 18+ SPEND ON AVERAGE 45 MINUTES PER DAY IN Q1 2018 ON SOCIAL NETWORKING

Consider this: According to the Q1 2018 Nielsen MediaTech Trender, a quarterly consumer tracking survey which concentrates on the emerging technology devices and services that are shaping media use today, among adults who view video content within social networking sites/apps, 64% of smartphone users and 46% of tablet users do so at least once per day. Among 18-34 year olds, these percentages are even higher—at 72% and 57%, respectively. This is additional video time that would be added to the almost six hours of total video adult consumers are already accessing.

PERCENT OF SOCIAL NETWORKING USERS THAT VIEW VIDEO CONTENT ON THEIR DEVICE AT LEAST ONCE PER DAY



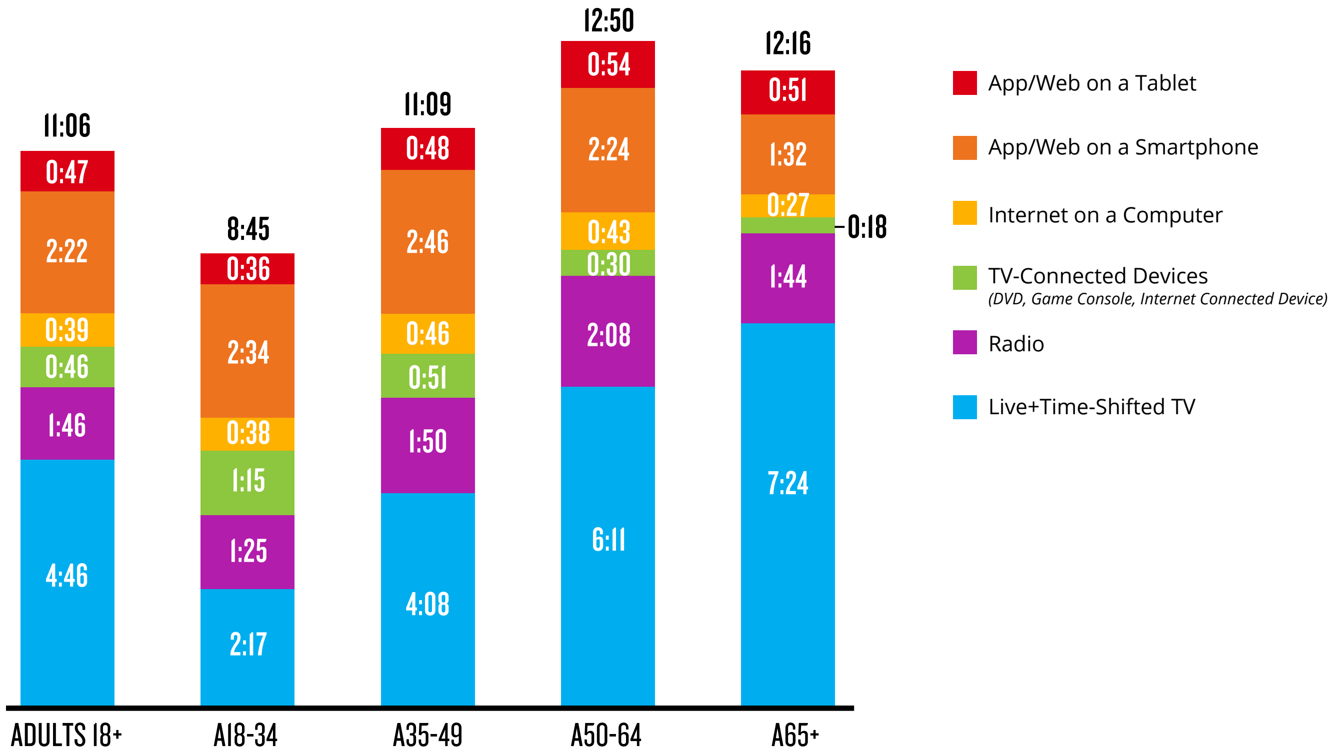
MEDIA TIME BY DEMOGRAPHIC

It's no secret that media usage varies by demographic—not only by total time spent, but also in the distribution of time spent across media platforms. Older demos tend to lean more on traditional mediums, while younger generations are often early adopters of nascent technology. For instance, in Q1 2018, younger adults (18-34) spent less than nine hours a day as compared to older adults (50+) who spend over 12 hours a day with content across platforms. With older demos, more time is spent with linear platforms of television and radio with less time on digital platforms.

ADULTS 50+ SPEND OVER 12 HOURS A DAY WITH CONTENT ACROSS PLATFORMS

Q1 2018 DAILY HOURS:MINS OF USAGE

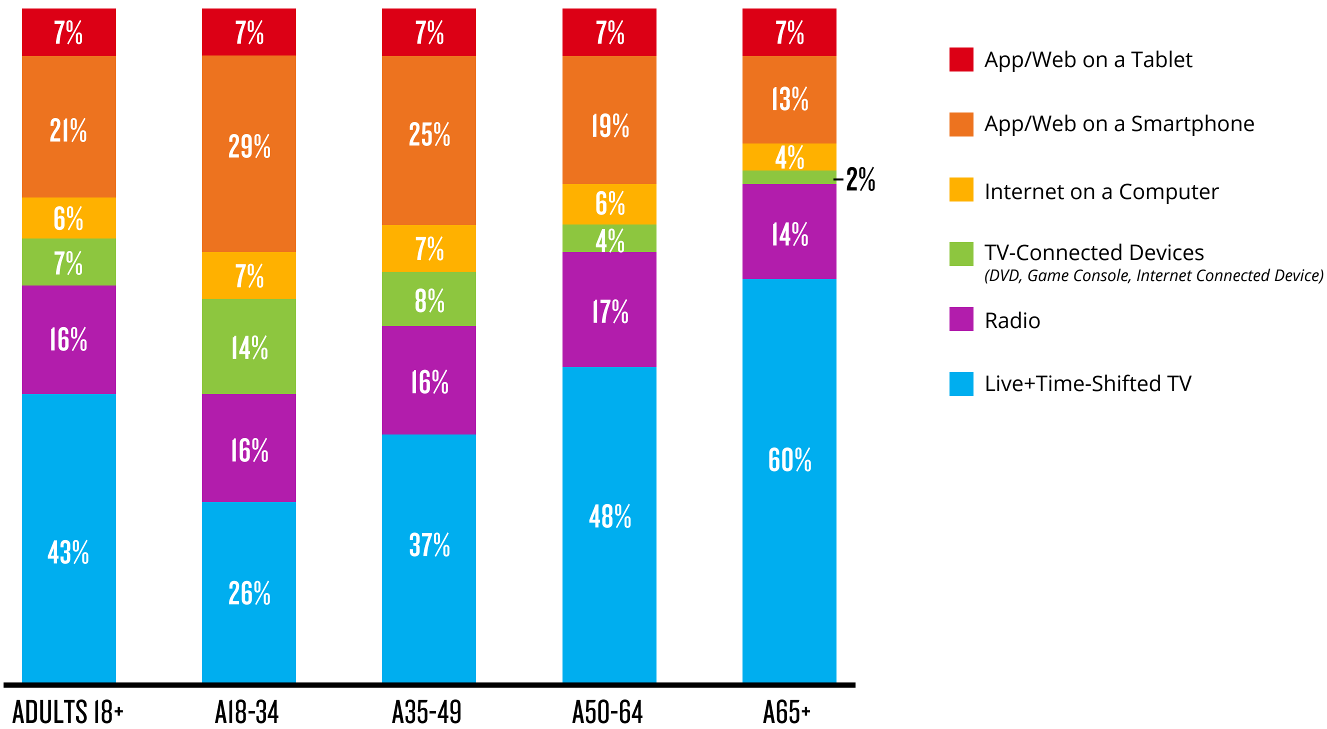
BASED ON TOTAL U.S. POPULATION



However, in looking at the percent of time people spend with these platforms, a different story begins to emerge. Regardless of age, radio consistently accounts for between 14-17% of daily media use. Adults 18-34 spend more time with digital platforms (43%) than TV and TV-connected devices (40%). Older adults spend more time on live and time-shifted content and less time on TV-connected device use and digital platforms, outside of tablet.

Q1 2018 SHARE OF DAILY TIME SPENT BY PLATFORM

BASED ON TOTAL U.S. POPULATION



YOUNG ADULTS 18-34 SPEND 43% OF THEIR TIME CONSUMING MEDIA ON DIGITAL DEVICES

Increasing choice of devices and content will continue to shift this distribution of device usage. Our MediaTech Trender survey explores how preferences can differ by demographic. For example, 64% of video streaming service users 18-34 say that they are motivated to stream content when they found shows they previously watched or listened to on traditional media. This is still a factor even as demographics age—62% among P35-49 and 59% among P50-64. Users of all ages are open to changing their behavior and how they are viewing to find the content they want to watch.

THE MULTICULTURAL CONSUMER

The race/ethnic landscape of the U.S. is rapidly changing, with younger generations being more diverse than those of their parents and grandparents before them. While every individual has personalized media habits, Black adults 18+ on average consume nearly thirteen and a half hours of media per day, almost two-and-a-half hours more than the average adult. Marketers take note: this group is also the heaviest users of media across all platforms, especially live TV. Hispanic persons consume less overall media on average, but do listen to more radio and have higher time spent on game consoles and internet connected devices. Asian American adults spend more time on their computers and tablets than any other group.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION – Q1 2018

	TOTAL	BLACK	HISPANIC	ASIAN AMERICAN
Live TV	4:10	6:01	3:07	2:08
Time-Shifted TV	0:36	0:35	0:21	0:17
Radio	1:46	1:52	1:51	na
DVD/Blu-ray Device	0:06	0:07	0:05	0:04
Game Console	0:14	0:16	0:15	0:09
Internet Connected Device	0:26	0:29	0:28	0:32
Internet on a Computer	0:39	0:34	0:27	0:52
App/Web on a Smartphone	2:22	2:46	2:17	2:28
App/Web on a Tablet	0:47	0:47	0:39	0:50
Total	**11:06**	**13:27**	**9:30**	**7:20***

*Radio measurement includes Asian Americans but cannot be separated from the total audience at this time

HISPANICS LISTEN TO MORE RADIO AND HAVE HIGHER TIME SPENT ON GAME CONSOLES AND INTERNET CONNECTED DEVICES

Total video use is highest among Black adults at eight hours and four minutes per day. They are spending the most time on Live+Time-shifted TV viewing and TV-connected device usage. Hispanics over-index on digital video consumption, with computer, smartphone, and tablet accounting for 11% of their overall video use. Asian American adults spend the least amount of time with video at three hours and 38 minutes per day.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

BASED ON TOTAL U.S. POPULATION – Q1 2018

	TOTAL	BLACK	HISPANIC	ASIAN AMERICAN
Live+Time-Shifted TV	4:46	6:37	3:28	2:25
TV-Connected Devices	0:46	0:52	0:47	0:44
Video on a Computer	0:10	0:13	0:10	0:14
Video Focused App/Web on a Smartphone	0:10	0:17	0:14	0:09
Video Focused App/Web on a Tablet	0:05	0:05	0:08	0:06
Total	**5:57**	**8:04**	**4:47**	**3:38**

While video consumption varies by race and ethnicity, social media usage is more consistent across all groups. Asian Americans are spending the most time on social networks at 48 minutes per day, with three-fourths of that being accessed via smartphone. They are also spending twice as much time with computers than Black and Hispanic social networking users.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON SOCIAL NETWORKING

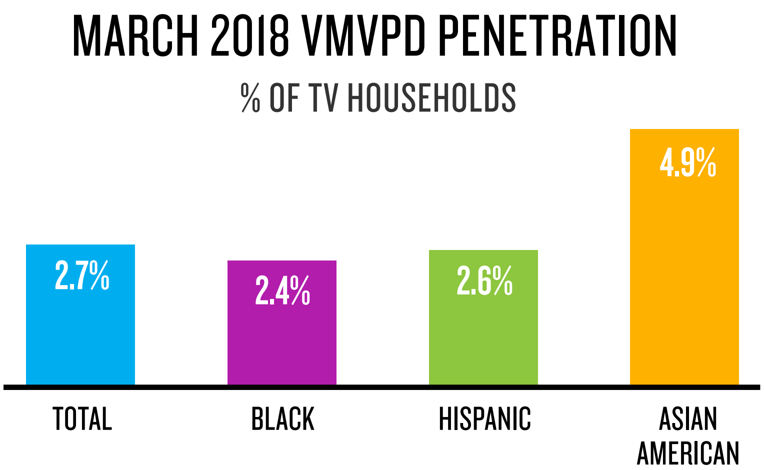
BASED ON TOTAL U.S. POPULATION – Q1 2018

	TOTAL	BLACK	HISPANIC	ASIAN AMERICAN
Computer	0:05	0:03	0:03	0:06
Smartphone	0:34	0:35	0:37	0:36
Tablet	0:06	0:06	0:04	0:06
Total	**0:45**	**0:44**	**0:44**	**0:48**

TYPES OF TELEVISION HOUSEHOLDS

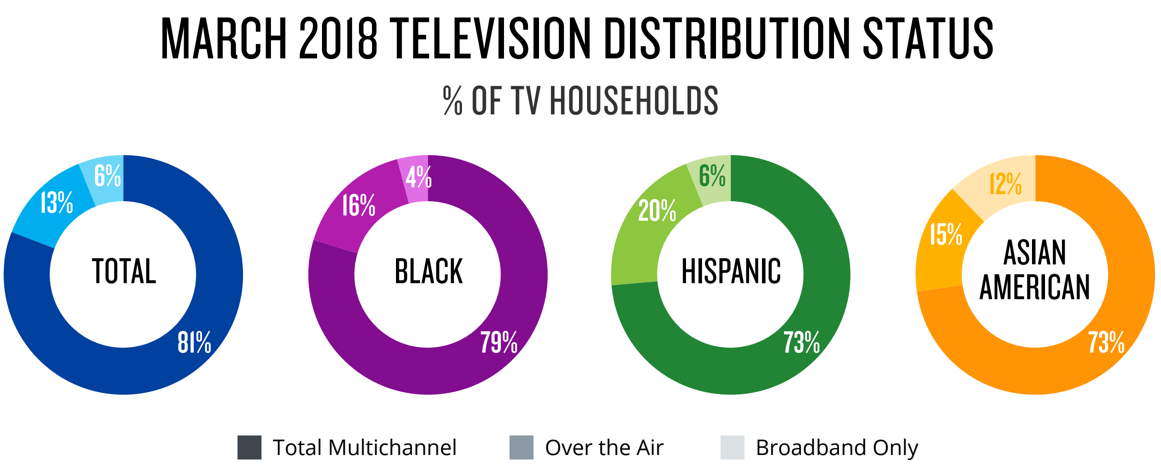
Consumers today have a choice on not just the devices they are viewing or when they are connecting with content, but also in how this content gets "piped" into their homes. Some opt for traditional cable, satellite or telco options that provide package tiers that suit their tastes in channels and programming. Other homes choose to access free channels over the air and complement this thrifty spending with other video subscriptions or services. And some homes may choose to receive exclusive content through an internet connection (i.e., broadband only homes). In all cases, a television household is one that can view content on a television set.

Across all household types (traditional cable, over the air, broadband only), consumers can subscribe to a virtual multichannel video programming distributor (vMVPD) that provides the much talked about "skinny bundle" options as well as larger offerings to consumers via an internet connection. In fact, 15% of homes that subscribe to a vMVPD also subscribe to traditional cable services, 36% are over the air and 49% are broadband only households.



VIRTUAL PROVIDER SERVICES THAT ALLOW CONSUMERS TO CUSTOMIZE THEIR CHANNEL CHOICES NOW EXIST IN ALMOST 3% OF ALL TV HOUSEHOLDS

Since vMPVDs provide access to linear channels in the household, regardless if they are over the air homes or broadband only homes, we consider them to be multichannel homes. Total multichannel homes account for 81% of television households. Penetration is lower for multicultural homes, with Black households at 79% and Hispanic and Asian Americans at 73%. Over-the-air homes account for 13% of television homes with higher penetration across race and ethnicities. One in five Hispanic households are an over the air home. Broadband homes account for 6% of overall TV households.



Note: Total Multichannel, Over the Air and Broadband only breaks are mutually exclusive. Homes with virtual providers (vMVPDs) are included within Total Multichannel.

The choice of how consumers decide to get content in their home has a direct impact on their behaviors and the content they can view. Across all home types, consumers may have access to other subscription services as well as TV-connected devices that complement traditional television usage. For example, homes that have moved away from traditional services have access to other streaming apps or services (i.e., free network specific, SVOD services, etc.) via sets or devices to supplement available content. In fact, according to the MediaTech Trender survey, 24% of video streaming service users adopted these services to replace content that they stopped subscribing to.

Multichannel homes have the highest time spent at just over six hours a day, which aligns with the fact that they have access to a higher number of channels, devices, and services. Over-the-air homes spent a little over an hour less with the set than multichannel homes, but two hours more than broadband only homes. This is due to having access to traditional over the air channels in addition to other TV-connected device use.

HOMES WITH A VMVPD SUBSCRIPTION HAVE SIMILAR TELEVISION USAGE LEVELS TO THOSE OF OVER THE AIR HOMES

These vMVPD homes tend to be over the air or broadband, which have lower television usage levels to begin with and depend on device use for streaming content. Additionally, other factors, such as characteristics of vMVPD households, can influence television usage levels within these homes.

Q1 2018 DAILY TOTAL TV USAGE (HH:MM)

P18+

	TOTAL	BLACK	HISPANIC	ASIAN AMERICAN
Total Multichannel	6:02	7:53	4:36	3:44
Over the Air	4:48	7:17	3:39	2:00
Broadband Only	2:47	3:27	2:38	1:54
vMVPD	4:20	6:10	3:37	2:32

Note: Total Multichannel, Over the Air and Broadband only breaks are mutually exclusive. Homes with virtual providers (vMVPDs) are included within Total Multichannel. vMVPD homes are inclusive all household types listed in table.

SUBSCRIPTION VIDEO ON DEMAND

Subscription-based video on demand (SVOD) services continue to disrupt consumer media behavior while making gains across the U.S. media landscape. Many homes use SVOD to supplement their video viewing palate, with nearly two-thirds of TV households having access to at least one of these services (Netflix, Hulu, or Amazon Prime). While this is a win for consumers looking for choice, media owners have choices of another kind in terms of windowing content, licensing deals and syndication options.

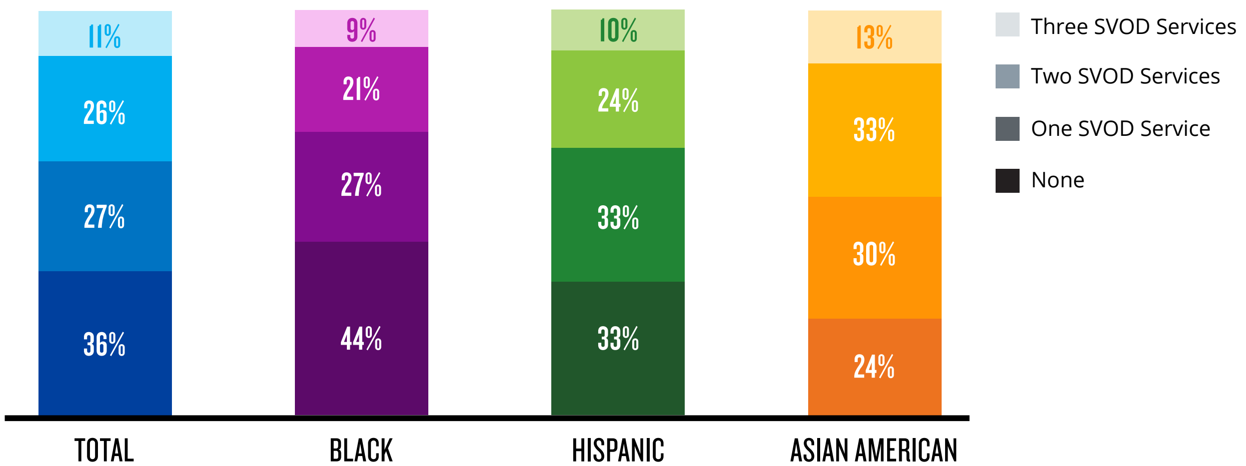
SUBSCRIPTION VIDEO ON DEMAND HOUSEHOLD ACCESS %

TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018
58%	64%	49%	56%	59%	67%	70%	76%

Many households actually have access to more than one of the three main SVOD services. Across the total U.S., 27% of TV households have access to only one service and 37% to more than one service. Eleven percent have access to all three. So over one in 10 households have three extra channels fighting for screen time. Among Black households, 30% have two or more services. This grows to 34% among Hispanic households, with 10% having all three. Asian Americans have the largest percentage with almost half of these households having access to two or more services.

% OF SVOD SERVICE ACCESS AMONG TV HOUSEHOLDS

MARCH 2018



Through our MediaTech Trender survey, we can also understand the factors motivating adults to adopt SVOD services. Of the adults surveyed, 45% said they subscribe to gain access to video content they liked and 42% were looking to watch a particular program that they heard about. However, while these services are easy to add they are also easier to cancel than a more traditional service. 32% of adults who cancelled an SVOD service did so because they were not using it enough to validate the cost. Consumers will continue to adjust their behaviors to find the media mix that best works for their needs.

DEVICES IN THE HOUSEHOLD

Consumers are faced with more device choices now than at any point in history, and every decision on what to watch or how to watch it comes at the expense of other content or delivery mechanisms. Like a technological Darwinism, some technology will no doubt fall out of fashion. Media such as the DVD/Blu-ray player are showing declines in penetration, from access in three quarters of households to about two thirds from March 2017 to March 2018. DVR penetration, which only a few years ago was rapidly expanding in U.S. homes, has seen its growth slow but is still present in 55% of TV households. Newer media, such as internet connected devices and smart TVs, that enable streaming of content to the TV set, are showing strong year-over-year increases. Both device types are now in 37 and 38% of TV households, respectively.

Video game consoles straddle that line between older and newer media as more recent generation consoles are enabled for streaming content to the set. Penetration of these devices are flat at 43% even as consumers replace older consoles with newer ones. Computer penetration also remained steady at 79%.

90% OF TV HOUSEHOLDS HAVE ACCESS TO A SMARTPHONE AND 64% HAVE A TABLET

DEVICE OWNERSHIP % IN TV HOUSEHOLDS

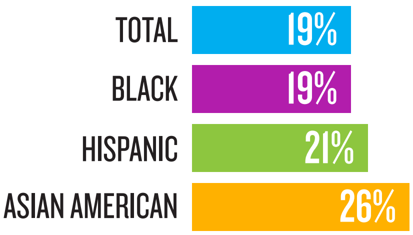
	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018
DVD/Blu-ray Player	73%	67%	68%	61%	65%	58%	61%	53%
DVR	54%	55%	52%	54%	46%	48%	47%	47%
Enabled Smart TV	30%	38%	25%	35%	35%	44%	44%	50%
Internet Connected Device	32%	37%	30%	38%	34%	40%	53%	56%
Game Console	43%	43%	43%	42%	53%	53%	46%	47%
Computer	79%	79%	68%	68%	71%	69%	90%	89%
Smartphone	87%	90%	88%	91%	94%	95%	95%	96%
Tablet	63%	64%	57%	56%	63%	62%	76%	75%

EMERGING TECHNOLOGIES ARE EXPANDING THE AUDIO LANDSCAPE

New devices and services in the household are also influencing changes in the audio landscape. Smart speakers and audio streaming services are promoting more ways for consumers to listen. Multicultural consumers are leading the way when it comes to interest in and adoption of both smart speakers and audio streaming services, according to Q1 2018 MediaTech Trender survey. With audio becoming more accessible all the time, radio broadcasters, artists and content creators alike are focusing on cutting through in today's broadening audio landscape, while also considering how the listening experience is evolving around us.

SMART SPEAKER - USE

What % use the device in the household?

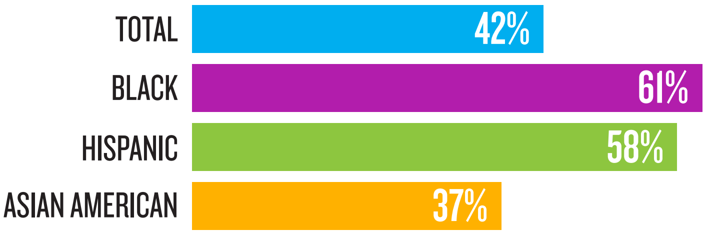


AUDIO STREAMING SERVICES - USE

What % are currently using streaming services for music, radio, podcasts?

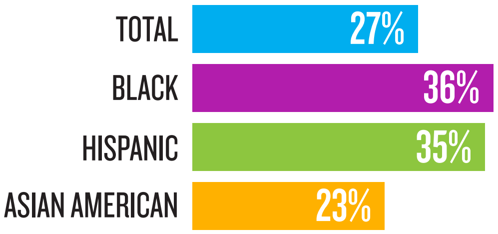
SMART SPEAKER - INTEREST

What % are very or somewhat interested in owning the device?



AUDIO STREAMING SERVICES - INTEREST

What % are very or somewhat interested in using or subscribing to a streaming service?



Smart speaker device: Wireless speaker and voice command device with an integrated virtual assistant that offers interative actions and hands-free activation (e.g. Amazon Echo Dot, Google Home)

Audio streaming service for listening to music, radio or podcasts (e.g. Spotify, iHeartRadio, TuneIn, Pandora, Apple Music, Soundcloud, etc.)

STREAMING CAPABLE TV-CONNECTED DEVICES

Internet enabled devices connected to the set or internet enabled smart TVs allow consumers multiple touchpoints in accessing subscription video services. At least one of the three main device types—enabled game consoles, internet connected devices (i.e., Apple TV, Roku, Google Chromecast, Amazon Fire TV), or enabled smart TVs—can be found in two thirds of TV homes in the U.S. Three quarters of Hispanic households and two thirds of Black households have at least one device type, with the highest penetration coming among Asian American households at 84%.

INTERNET ENABLED TV-CONNECTED DEVICES HOUSEHOLD ACCESS %

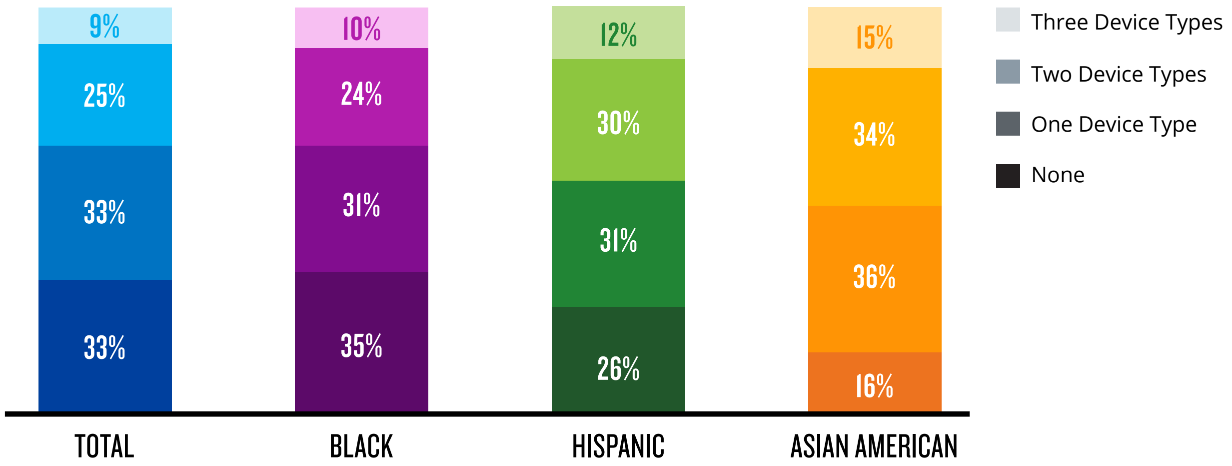
TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018	MARCH 2017	MARCH 2018
61%	67%	56%	65%	67%	74%	79%	84%

But consumers do not just have only one type of streaming capable device. Many households have a multitude of devices, often located in a different room of the home and being leveraged by a different family member. One third of homes (33%) have one type of TV-connected device, but 34% of homes actually have two or more. Penetration is the greatest among Asian American households, with 34% having two and 15% having all three device types. The most common combinations are households having a game console with either an internet connected device or an enabled smart TV.

ONE THIRD OF HOMES (33%) HAVE ONE TYPE OF TV-CONNECTED DEVICE, BUT 34% OF HOMES ACTUALLY HAVE TWO OR MORE

% OF TV-CONNECTED DEVICE OWNERSHIP BY TYPE AMONG TV HOUSEHOLDS

MARCH 2018

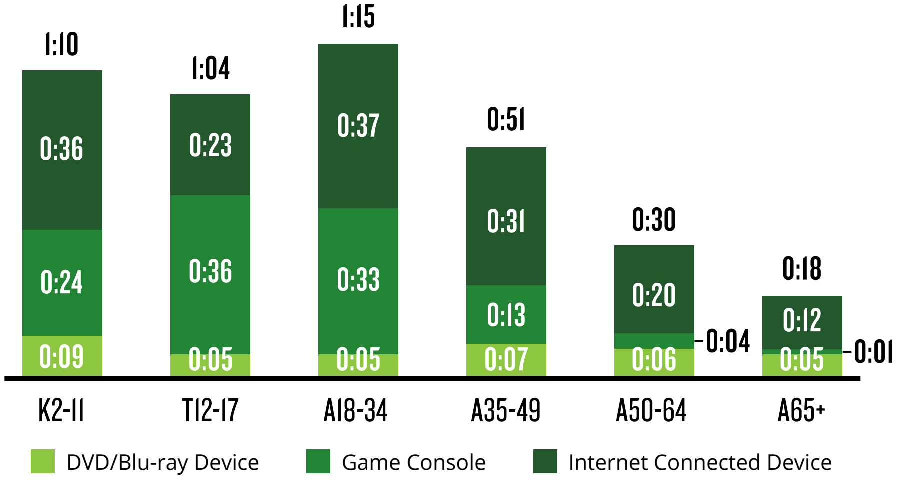


TV-CONNECTED DEVICE USAGE BY AGE

The types of TV-connected devices used and the amount of time spent on each differs greatly by demographic. Game console use has a sweet spot with teens as well as 18-34 year olds as the device is likely being used in multiple rooms in the home for both gaming and streaming content. This group spends over 30 minutes daily using game consoles. Persons 2-49 spend more time streaming content through their internet connected devices (including apps on smart TVs) compared to those over 50.

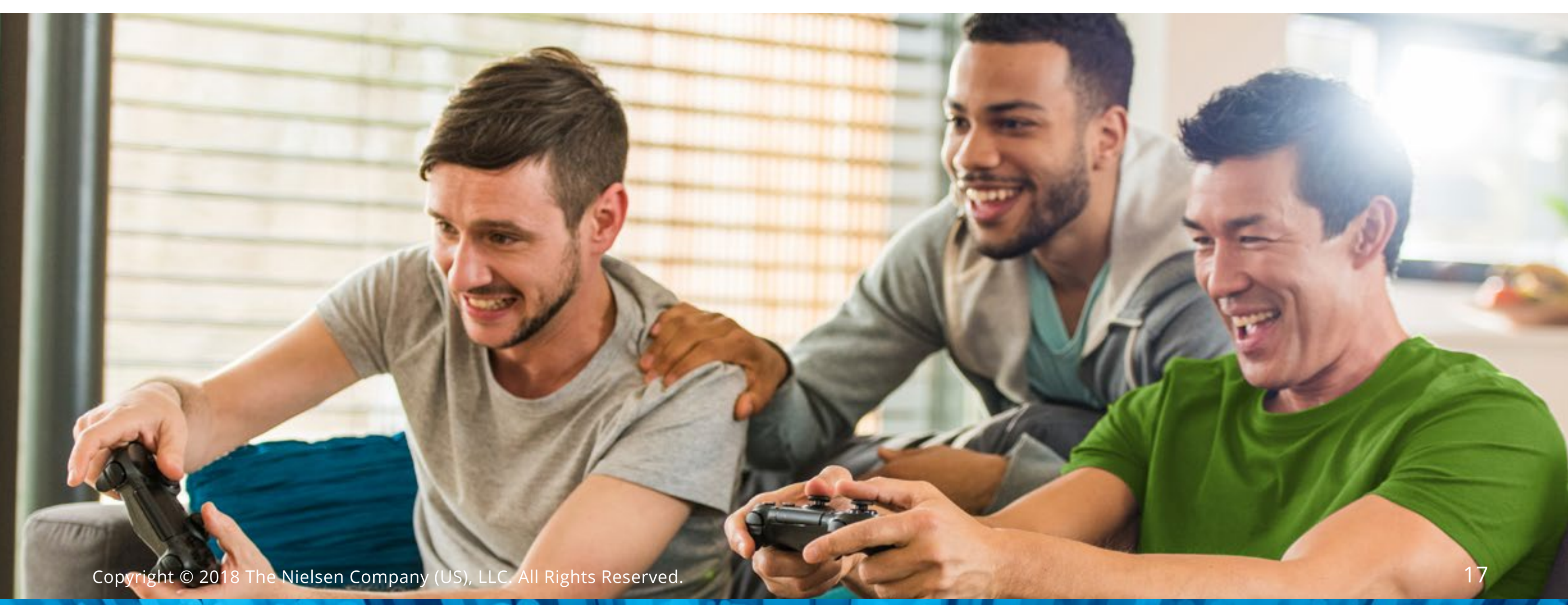
AVERAGE TIME SPENT PER DAY ON TV-CONNECTED DEVICES

BASED ON U.S. POPULATION - Q1 2018



ADULTS 18-34 ARE SPENDING 150% MORE TIME PER DAY WITH TV-CONNECTED DEVICES THAN 50-64 YEAR OLDS

Depending on where people are in their life stage, usage of TV-connected devices can vary. Although we see lower levels of device penetration among older adults, they are still adopting these devices, perhaps influenced by their children and grandchildren growing up with this technology. While there has been continued growth in both penetration and usage of TV-connected devices across demographics, the big question is if these behaviors will carry forward as people age. The answer of course is predicated on how people will customize their behaviors in the future as technology evolves to make things even more seamless for the user and the amount of content available to them.



STREAMING TO THE TELEVISION

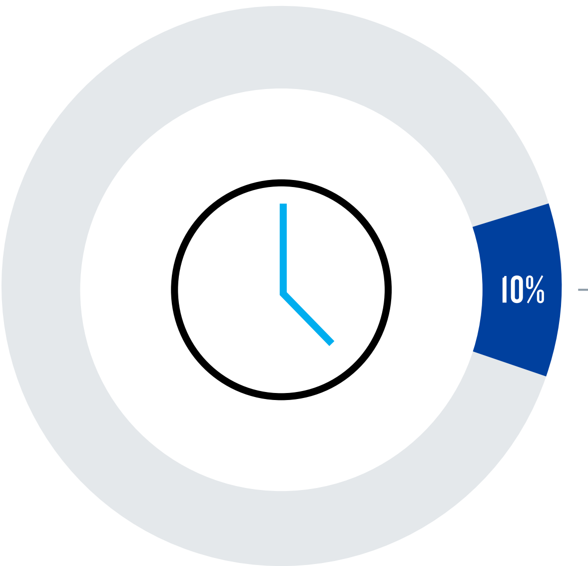
Over two-thirds of homes have devices that are capable of streaming content to the television set, but having the ability to steam content and actually doing so are two different things altogether. In regard to TV-connected devices, not all time spent is viewing video content. For instance, consumers can be using a console to play games, but not to watch video. With smart TVs or internet connected devices, viewers may be spending time browsing menus looking for a piece of content to view.

ONE OUT OF 10 MINUTES OF TELEVISION USED IN STREAMING CAPABLE HOMES IS STREAMING VIDEO THROUGH A TV-CONNECTED DEVICE OR SMART TV

Using Nielsen's streaming meter in a representative subset of homes that are capable of streaming to the TV set, we know that as of March 2018, approximately one out of every 10 minutes in these homes is streaming video through a TV-connected device or smart TV. Of the overall time users spend streaming to the TV set in these homes, 40% is via internet connected devices. Smart TVs account for 36% of streaming time, followed by 22% from game consoles and 2% from "smart" DVD/Blu-ray players.

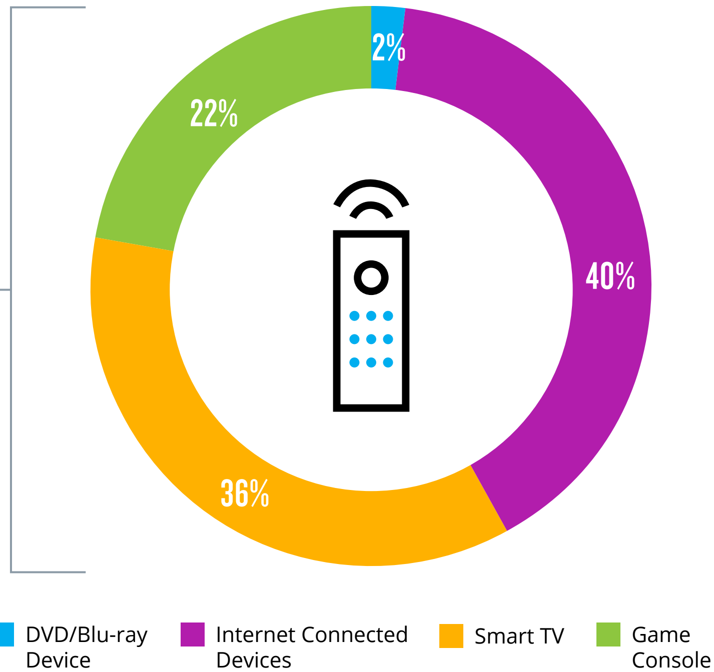
% OF STREAMING OUT OF TOTAL USAGE OF TV

MARCH 2018, P2+



% OF VIDEO STREAMING MINUTES BY DEVICE

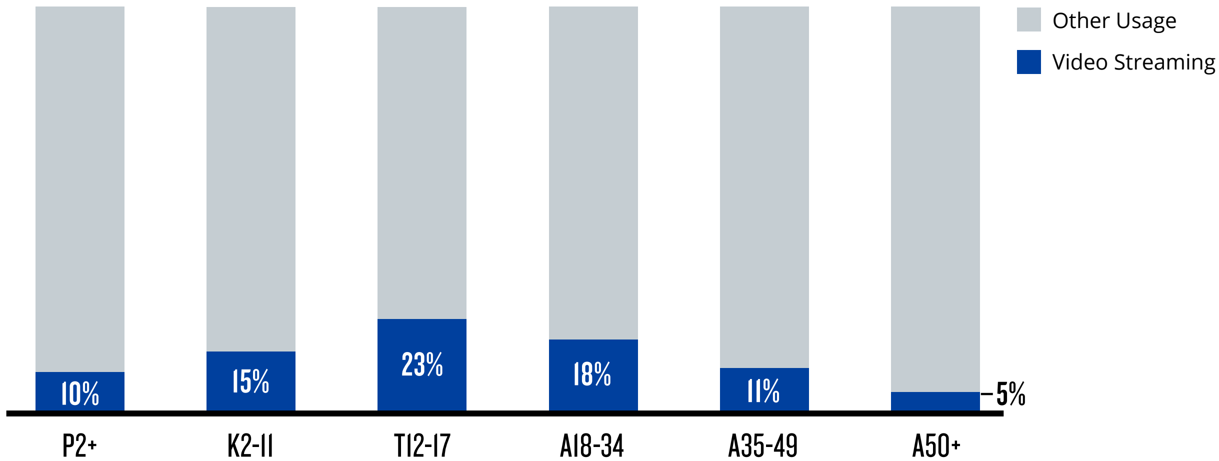
MARCH 2018, P2+



Streaming varies by demographic as well with a higher percentage of streaming coming from those aged 2-34. Teens have the highest percentage with almost one out of every four minutes on the set in over-the-top (OTT) capable homes being streaming content. The percent of streaming declines as people age, with 11% of total TV usage among adults 35-49 and 5% among 50+.

% OF STREAMING OUT OF TOTAL USAGE OF TV

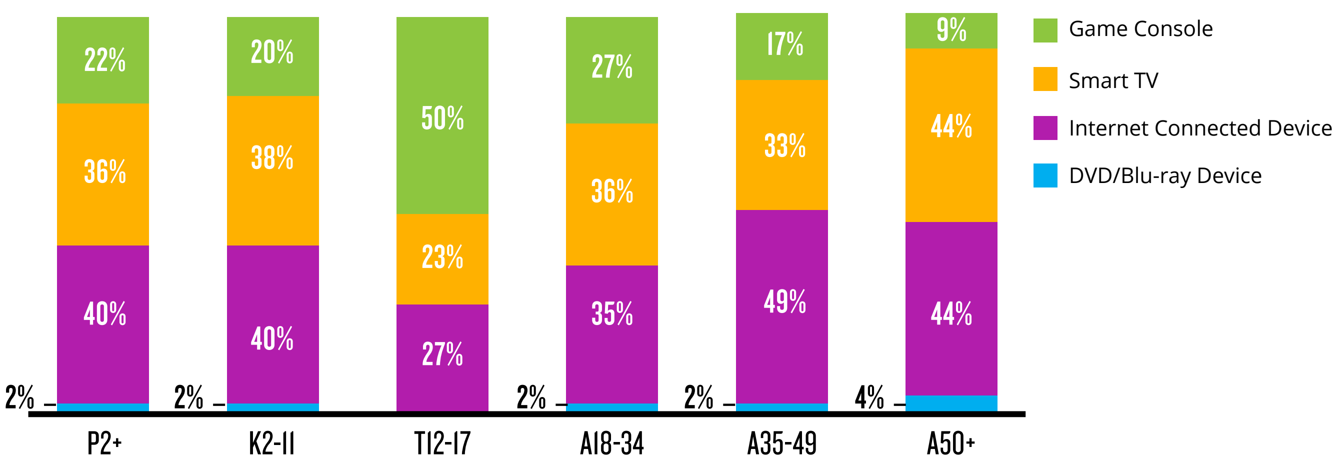
MARCH 2018



Users' preferences for streaming devices also changes with age. Fifty percent of streaming by teens is done through a game console, whereas for kids 2-11 and adults 18+ streaming is mostly done through internet connected devices or smart TVs. Nearly half of all video streaming by adults 35-49 comes through internet connected devices, while adults 50+ have a higher percentage of their streaming on smart TVs.

% OF VIDEO STREAMING MINUTES BY DEVICE

MARCH 2018



NON-TELEVISION HOUSEHOLDS

Through our national television panel, we have a great understanding of everything that is viewed on the television and use of all devices connected to it. But what about those households that don't qualify as a TV household? What are the profiles of these homes? Are these homes watching content and how are they getting it?

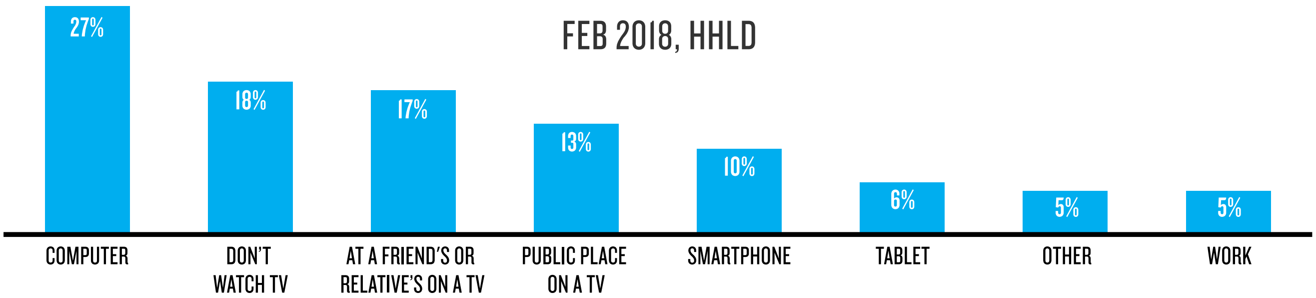
As we recruit homes to be part of our measurement panel, we encounter some who do not qualify as a television household (approximately 4% or over 4 million U.S. homes). From these homes, we collect some general information about them to get an understanding of their behaviors. As a reminder, a television household is defined as a household with at least one operable TV set able to deliver video through: Cable set-top box or satellite receiver, antenna or broadband connected to the TV set directly (i.e., smart TV) or via a separate device (i.e., streaming device). A non-TV household may have a set, but not connected in one of these ways or does not have a TV set.

OVER EIGHT OUT OF 10 NON-TELEVISION HOUSEHOLDS ARE STILL VIEWING VIDEO CONTENT

In fact, approximately six out of ten non-TV households have access to the internet that would enable them to stream content from other services to a television set or digital devices. When asked where they do watch TV programming, 27% indicated they use their computer, 10% use their smartphones and 6% tablets. Additionally, 30% indicated they watch out of the home, either at a friend's or relative's house or in a public place.

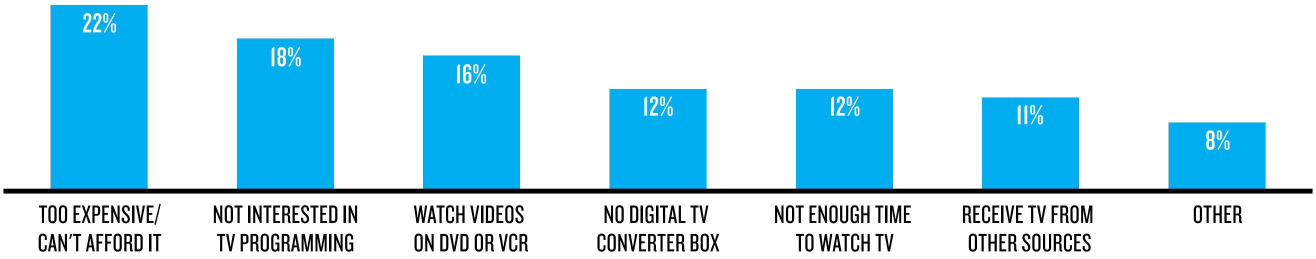
WHERE DO YOU CURRENTLY WATCH TV PROGRAMMING?

FEB 2018, HHLD



When asked why these households choose not to have a traditional TV set, 22% noted that the cost of service is not affordable to them. 16% still use their libraries of DVDs or VCR tapes for content and 12% state they do not have the time to watch television. Only 18% stated that they were simply not interested in TV programming.

REASON YOU DO NOT HAVE A WORKING TV SET OR TV RECEPTION IN THE HOME



They are smaller households, too, with 37% in a single person home and another 28% in a two person home. Still, 70% still have a television set, though not connected in a manner that would qualify as a TV household. Nine percent of non-TV households are Hispanic and 12% are Black, both lower percentages than overall TV homes. Non-televisions households are twice as likely to be lower income as compared to television households, perhaps indicative of the impact price points have in the decision making process for television services.

FEB 2018 PROFILE OF NON-TELEVISION HOUSEHOLDS

		NON-TV HOMES	TV HOMES
Owner/Renter Age	**Under 25**	16%	3%
	25-34	30%	15%
	35-44	20%	16%
	45-54	14%	19%
	55+	20%	47%
Race/Ethnicity	**Black**	12%	14%
	Hispanic	9%	14%
	Asian American	8%	4%
	White	69%	76%
Household Size	**1**	37%	24%
	2	28%	34%
	3+	35%	43%
# Television Sets	**None**	31%	0%
	1	39%	16%
	2+	31%	84%
Household Income	**Less than $30K**	53%	22%
	$30K-$50K	19%	20%
	$50K-$75K	14%	21%
	$75K-$100K	6%	15%
	$100K+	8%	22%

Income profile for non-TV homes based on those who answered the question.
Race and ethnicity breaks are not mutually exclusive.

NON-TV HOUSEHOLDS TEND TO BE YOUNGER WITH 46% OF OWNERS/ RENTERS UNDER THE AGE OF 34

DATA TABLES

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

Q1 2018 WEEKLY TIME SPENT IN HOURS: MINUTES AMONG U.S. POPULATION

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+
Total Use of Television	38:46	24:46	34:56	46:47	53:54	29:21	33:50	52:19	29:45	22:05
Live+Time-Shifted TV	33:22	16:01	28:58	43:15	51:45	21:52	27:08	46:17	24:14	16:54
Time-Shifted TV	4:13	2:09	4:29	5:27	5:24	3:12	4:00	4:07	2:24	2:00
TV-Connected Devices	5:24	8:44	5:58	3:32	2:08	7:29	6:43	6:02	5:31	5:11
DVD/Blu-ray Device	0:41	0:34	0:51	0:45	0:34	0:42	0:46	0:47	0:33	0:25
Game Console	1:41	3:53	1:33	0:27	0:09	2:50	2:04	1:53	1:42	1:02
Internet Connected Device	3:02	4:17	3:34	2:20	1:24	3:58	3:52	3:23	3:16	3:44
Radio	12:20	9:52	12:47	14:57	12:10	11:11	12:22	13:02	12:59	na
Internet on a Computer	4:34	4:29	5:24	5:03	3:07	4:54	5:15	3:58	3:07	6:01
Social Networking	0:36	0:30	0:39	0:48	0:25	0:34	0:40	0:21	0:19	0:41
Video on a Computer	1:09	1:34	1:38	0:52	0:20	1:36	1:35	1:29	1:08	1:36
App/Web on a Smartphone	16:32	17:58	19:22	16:51	10:41	18:36	18:55	19:25	16:01	17:15
Video Focused App/Web	1:07	1:45	1:19	0:48	0:24	1:33	1:23	2:01	1:35	1:01
Streaming Audio	0:26	0:42	0:27	0:19	0:10	0:35	0:29	0:29	0:35	0:28
Social Networking	3:58	5:22	4:35	3:20	1:59	5:01	4:44	4:04	4:16	4:14
App/Web on a Tablet	5:26	4:13	5:36	6:15	5:58	4:51	5:22	5:32	4:34	5:49
Video Focused App/Web	0:38	0:52	0:48	0:33	0:14	0:50	0:50	0:37	0:56	0:43
Streaming Audio	0:05	0:06	0:05	0:05	0:02	0:06	0:05	0:05	0:05	0:04
Social Networking	0:43	0:35	0:41	0:47	0:50	0:37	0:42	0:40	0:30	0:41

Q1 2018 WEEKLY TIME SPENT IN HOURS: MINUTES AMONG USERS OF EACH MEDIUM

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+
Total Use of Television	40:01	26:09	35:04	47:02	54:54	30:27	34:27	51:58	30:21	25:12
Live+Time-Shifted TV	35:36	17:59	29:50	43:58	53:01	23:50	28:38	47:01	25:41	20:33
Time-Shifted TV	7:43	4:30	7:10	9:10	10:26	5:56	6:45	7:26	5:28	4:49
TV-Connected Devices	9:52	13:09	9:20	7:31	6:15	11:24	10:31	11:28	9:41	9:33
DVD/Blu-ray Device	4:22	4:51	4:38	4:14	3:41	4:43	4:42	6:01	4:22	4:14
Game Console	9:53	12:20	7:33	6:03	5:07	10:35	9:15	10:58	8:49	8:16
Internet Connected Device	8:04	9:17	7:47	7:17	6:36	8:35	8:27	9:31	8:02	8:14
Radio	13:30	10:55	13:38	15:59	13:51	12:10	13:17	14:10	13:31	na
Internet on a Computer	7:36	7:11	8:16	8:12	6:19	7:42	8:05	7:22	6:36	8:30
Social Networking	2:04	1:38	2:00	2:40	2:05	1:48	2:01	1:29	1:35	1:52
Video on a Computer	4:09	4:48	5:01	3:19	1:57	4:54	4:47	5:26	5:11	4:23
App/Web on a Smartphone	20:54	20:44	21:59	20:58	19:03	21:19	21:40	23:59	20:03	20:29
Video Focused App/Web	1:56	2:28	1:57	1:29	1:09	2:14	2:03	3:05	2:30	1:39
Streaming Audio	1:00	1:12	0:57	0:50	0:43	1:06	0:58	1:04	1:15	0:58
Social Networking	5:26	6:34	5:37	4:33	4:01	6:08	5:49	5:28	5:53	5:28
App/Web on a Tablet	11:34	10:10	10:41	12:45	13:05	10:25	10:47	12:55	10:26	11:14
Video Focused App/Web	2:26	3:27	2:42	2:07	0:58	3:05	2:57	2:18	3:23	2:34
Streaming Audio	0:35	0:42	0:33	0:40	0:18	0:38	0:35	0:37	0:40	0:29
Social Networking	2:07	2:03	1:55	2:10	2:22	1:59	2:03	2:09	1:43	1:54

Q1 2018 WEEKLY REACH OF USERS (000) BY MEDIUM

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+
Total Use of Television	224,588	60,882	56,699	59,608	47,399	117,581	114,233	28,748	35,274	12,867
Live+Time-Shifted TV	217,983	56,638	55,141	59,006	47,199	111,779	109,918	28,170	33,992	11,879
Time-Shifted TV	128,742	31,502	36,183	36,032	25,025	67,685	69,912	16,165	15,850	6,152
TV-Connected Devices	124,338	43,626	36,804	27,889	16,019	80,430	74,810	14,766	20,420	8,388
DVD/Blu-ray Device	36,262	7,613	10,543	10,607	7,498	18,157	19,269	3,717	4,583	1,509
Game Console	38,043	20,580	11,854	4,301	1,308	32,434	26,226	4,746	6,905	2,042
Internet Connected Device	85,835	30,459	26,368	19,045	9,963	56,827	53,697	9,976	14,564	6,891
Radio	227,497	66,835	57,152	59,206	44,305	123,987	116,721	28,707	37,051	na
Internet on a Computer	148,950	45,584	39,464	38,960	24,942	85,048	80,847	16,666	18,128	10,943
Social Networking	71,457	22,449	19,533	19,140	10,334	41,982	40,614	7,443	7,650	5,692
Video on a Computer	68,610	23,710	19,722	16,604	8,574	43,432	41,003	8,370	8,401	5,655
App/Web on a Smartphone	195,615	63,275	53,238	50,776	28,326	116,513	108,561	25,027	30,691	12,990
Video Focused App/Web	143,930	51,650	41,005	33,893	17,382	92,655	84,213	20,262	24,209	9,440
Streaming Audio	106,472	42,560	29,121	23,482	11,309	71,681	63,236	13,965	17,793	7,303
Social Networking	180,446	59,739	49,455	46,159	25,093	109,194	101,068	23,037	27,849	11,930
App/Web on a Tablet	116,090	30,389	31,664	30,977	23,060	62,052	61,731	13,211	16,802	7,975
Video Focused App/Web	64,835	18,422	17,834	16,244	12,335	36,256	35,434	8,324	10,583	4,304
Streaming Audio	32,897	10,521	9,032	7,409	5,935	19,553	18,547	3,976	4,938	2,185
Social Networking	82,901	20,477	21,476	23,122	17,826	41,953	42,237	9,573	11,027	5,567

Q1 2018 WEEKLY REACH % OF USERS AMONG U.S. POPULATION

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+
Total Use of Television	91%	83%	94%	95%	94%	88%	92%	92%	91%	80%
Live+Time-Shifted TV	88%	77%	91%	94%	94%	83%	88%	90%	88%	74%
Time-Shifted TV	52%	43%	60%	57%	50%	50%	56%	52%	41%	38%
TV-Connected Devices	50%	59%	61%	44%	32%	60%	60%	47%	53%	52%
DVD/Blu-ray Device	15%	10%	17%	17%	15%	14%	15%	12%	12%	9%
Game Console	15%	28%	20%	7%	3%	24%	21%	15%	18%	13%
Internet Connected Device	35%	41%	43%	30%	20%	42%	43%	32%	38%	43%
Radio	92%	91%	94%	94%	88%	92%	94%	92%	96%	na
Internet on a Computer	60%	62%	65%	62%	49%	64%	65%	54%	47%	71%
Social Networking	29%	31%	32%	30%	20%	31%	33%	24%	20%	37%
Video on a Computer	28%	32%	33%	26%	17%	33%	33%	27%	22%	37%
App/Web on a Smartphone	79%	87%	88%	80%	56%	87%	87%	81%	80%	84%
Video Focused App/Web	58%	71%	68%	54%	34%	69%	68%	66%	63%	61%
Streaming Audio	43%	58%	48%	37%	22%	54%	51%	45%	46%	47%
Social Networking	73%	82%	82%	73%	50%	82%	81%	75%	72%	77%
App/Web on a Tablet	47%	42%	52%	49%	46%	46%	50%	43%	44%	52%
Video Focused App/Web	26%	25%	29%	26%	24%	27%	29%	27%	28%	28%
Streaming Audio	13%	14%	15%	12%	12%	15%	15%	13%	13%	14%
Social Networking	34%	28%	36%	37%	35%	31%	34%	31%	29%	36%

Q1 2018 TOTAL PERSONS, KIDS, AND TEENS

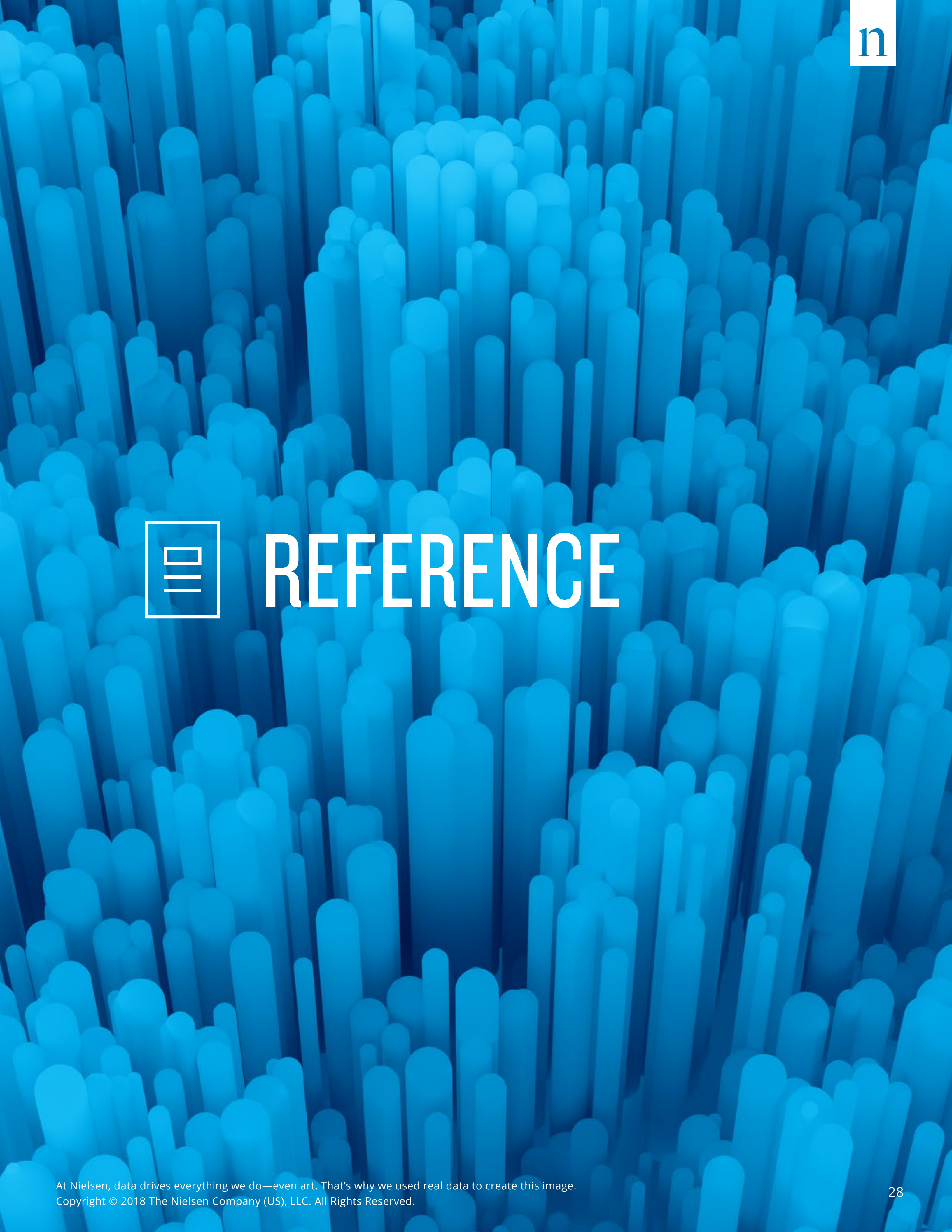
WEEKLY SUMMARY OF USAGE

TOTAL (P2+)	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	35:18	36:01	283,905	91%
Live+Time-Shifted TV	29:23	31:12	273,630	87%
Time-Shifted TV	3:43	6:54	158,581	51%
TV-Connected Devices	5:55	10:06	167,157	53%
DVD/Blu-ray Device	0:44	4:24	47,326	15%
Game Console	2:02	9:42	59,280	19%
Internet Connected Device	3:10	7:58	113,833	36%
Radio (P12+)	11:48	12:58	249,228	92%

KIDS 2-11	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	24:33	22:21	37,502	92%
Live+Time-Shifted TV	16:24	15:26	35,155	86%
Time-Shifted TV	2:03	3:40	19,454	48%
TV-Connected Devices	8:09	10:40	27,685	68%
DVD/Blu-ray Device	1:05	4:54	7,803	19%
Game Console	2:50	8:12	12,584	31%
Internet Connected Device	4:14	8:10	18,832	46%

TEENS 12-17	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	18:23	18:29	21,815	87%
Live+Time-Shifted TV	10:57	11:29	20,492	82%
Time-Shifted TV	1:21	2:53	10,385	42%
TV-Connected Devices	7:26	11:04	15,134	61%
DVD/Blu-ray Device	0:34	3:40	3,261	13%
Game Console	4:11	10:59	8,653	35%
Internet Connected Device	2:42	6:35	9,165	37%
Radio	6:32	7:33	21,731	87%

REFERENCE



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

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 web surfing	Internet Applications (Non-browser applications such as office apps, email apps, banking information, private/incognito browsing), video streaming in web players
Social Networking on a Computer	All sites in the Member Communities subcategory as defined in the Nielsen dictionary	Reddit, YouTube, and other sites with active public forums and comments sections
Video on a Computer	Computer video played in a web browser	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 and iMessage is not included
Video Focused App/Web on a Smartphone	Apps and websites whose primary function is to provide video content (Ex. Netflix, YouTube, HBOGO)	Video content available on apps and websites where video is not the primary focus (Ex. CNN, Weather Channel). Video on social networks (Ex. Facebook, Snapchat) is not measured here but is included in Social Networking on a Smartphone
Streaming Audio on a Smartphone	Apps and websites specifically designed to provide audio content (Ex. Pandora, Spotify, iHeartRadio)	Audio content through apps that also provide video capabilities (Ex. YouTube, VEVO). That content is measured under Video Focused App/Web on a Smartphone.
Social Networking on a Smartphone	All apps/sites in the Social Networking subcategory as defined in the Nielsen dictionary	Apps and websites designated elsewhere in the Nielsen dictionary with active public forums and comments sections
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 (Ex. Calculator, Notes) • Email activity through the standard Mail app for iOS • Standard text messaging and iMessage is not included
Video Focused App/Web on a Tablet	Apps and websites whose primary function is to provide video content (Ex. Netflix, YouTube, HBOGO)	Video content available on apps and websites where video is not the primary focus (Ex. CNN, Weather Channel). Video on social networks (Ex. Facebook, Snapchat) is not measured here but is included in Social Networking on a Tablet
Streaming Audio on a Tablet	Apps and sites specifically designed to provide audio content (Ex. Pandora, Spotify, iHeartRadio)	Audio content through apps that also provide video capabilities (Ex. YouTube, VEVO). That content is measured under Video Focused App/Web on a Tablet
Social Networking on a Tablet	All apps/sites in the Social Networking subcategory as defined in the Nielsen dictionary	Apps and websites designated elsewhere in the Nielsen dictionary with active public forums and comments sections

GLOSSARY

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).

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

Internet Connected Device: Devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc.

Internet Enabled TV-Connected Device: A category of devices capable and enabled to access the internet through the television. Devices would include internet enabled Smart TVs, video game consoles and internet connected devices.

Over the Air: A mode of television content delivery that does not involve satellite transmission or cable (i.e.—a paid service). Also commonly referred to as “broadcast.”

Radio: Listening to AM/FM radio stations, digital streams of AM/FM stations (where captured in diary markets or encoded in PPM markets), HD radio stations, and satellite radio as captured in diary markets only. No other forms of radio or audio are included at this time.

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. For the purpose of this report, this is limited to Netflix, Hulu, and Amazon Prime.

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

Total Multichannel: Inclusive of Traditional Cable Plus (Wired Cable, Telco, Satellite) as well as homes that have a virtual provider.

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 (vMVPDs): Distributors that aggregate linear content licensed from major programming networks and package together in a standalone subscription format and accessible on devices with a broadband connection.

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

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. Time-shifted 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 + Time-shifted TV as well as TV-connected devices (DVD, Game Console, Internet Connected Device). Internet Connected Device usage would include Smart TV app usage.

TV-connected devices (DVD, Game Console, Internet Connected 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. Also, Internet Connected Device usage would include 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. Hispanic consumer audiences include both English and Spanish speaking representative populations.

RADIO METHODOLOGY

Audience estimates for 48 large markets are based on a panel of people who carry a portable device called a Portable 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 Q1 2018 report is based on the June RADAR studies.

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 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 include both English and Spanish speaking representative populations.

DIGITAL METHODOLOGY (COMPUTER, SMARTPHONE, TABLET)

Digital data is based on Nielsen's Total Media Fusion, which is reflective of both panel and census measurement. The Total Media Fusion is the best representation of the total digital landscape as it reflects digital activity as a whole. 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. Digital data for the Nielsen Total Audience Report was sourced from Nielsen Media Impact (Nielsen's cross platform planning solution).

Data used in this report is inclusive of multicultural audiences. For computer, Hispanic consumer audiences include both English and Spanish speaking representative populations. For mobile, recruitment of Spanish language audiences began in early 2017 and representation of Spanish Dominant Hispanic audiences continues to improve.

SOURCING

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) 01/01/2018 – 04/01/2018 via Nielsen NPOWER/National Panel; Radio 03/30/2017 – 03/28/2018 via RADAR 137 and Radio Nationwide Fall 2017; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. Weeks included for digital – 01/01/18, 01/08/18, 01/15/18, 01/22/18, 02/05/18, 02/12/18, 02/19/18, 03/05/18, 03/12/18, 03/19/18. Digital data was produced on 06/01/18 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 March 15, 2018 via Nielsen NPOWER/National Panel.

MEDIATECH TRENDER SURVEY

Nielsen's MediaTech Trender is a quarterly consumer tracking study launched in Q1 2018 by Nielsen Media Analytics. The online survey is offered in both English and Spanish to a U.S. general population sample 13 years or older. Based on Q1 2018 data.

STREAMING METER

Nielsen Custom Streaming Meter Usage Report, Based on a representative sample of 1,000 OTT Capable households from National TV Panel, Sum of Daily Streaming Minutes, Weighted, P2+, March 2018

NON-TV HOUSEHOLDS SURVEY

Nielsen Custom Survey of Ineligible Non-TV households based on February 2018

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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