ADVERTISING ACROSS TODAY'S MEDIA

THE NIELSEN TOTAL AUDIENCE REPORT

MARCH 2021

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AUDIENCE INSIGHTS

Advertising, like any other form of content, has the ability to change people. That is its primary purpose—to move minds. Its messages are meant to reach a consumer segment and then inspire that audience to take action.

That action could be as simple as cracking open a Coca-Cola after witnessing harmonization on a hilltop ("Hilltop" 1971). In the case of "No More PSA" (2015), the desired action was to raise awareness about the signs of domestic violence. Desired actions can also be more lighthearted, as was the drive to lace up a new pair of Nikes after hearing Mars Blackmon claim it's "gotta be the shoes" (1989) with respect to NBA superstar Michael Jordan's skills.

Compared with those classic TV spots, advertising today is more complex. In today's age of hyper consciousness, digital debate and cross-platform campaign rollouts, it's also more risky. What might seem provocative could come off as tone-deaf to others, which could prompt negative responses and actions among consumers, who now have an ability to respond to any content decision with a voice of their own. And those voices can gather and influence. Ultimately, advertising has the power to drive change and inspire action.

Living in a global pandemic for a year now adds an additional layer to a marketer's challenges, given the need to understand the landscape and find their best audiences with increasing efficiency. Metrics matter. And they need to reflect people, not devices. Metrics need to be inclusive and representational. They also need to facilitate quick decisions around reach, planning, optimization and activation.

Early on, we had little understanding about the short- and long-term transformative effects of the pandemic on consumerism and content. Huddled at home, TV viewing skyrocketed. Key ad categories like travel, auto and restaurants didn't align with stay-at-home orders, which fueled year-over-year ad spend declines of at least 25% in the second and third quarters. Spending picked up closer to the end of 2020, and global ad agencies expect a notable rebound this year.

In this *Nielsen Total Audience Report,* we cast a new eye on advertising. Where are consumers spending time and how are they thinking of spending their money? How has that changed? What are the brand opportunities and what types of advertising categories are seeing growth? With many people still spending more time at home, the TV remains a media diet mainstay and key opportunity for advertisers to present in a visual medium. 2020 was a year of widespread streaming adoption, which has fueled an array of new services and platforms—both subscription and ad-supported. But that doesn't mean brands can't tap into subscription platforms, as we're seeing growing interest in branded integrations in programming that isn't ad supported, and some of those integrations are driving key storylines.

One note: As of May 2020, Nielsen enhanced its smartphone measurement on Android devices through updated crediting rules to more precisely capture a user's intended behavior vs. app/web activity that is happening in the background. The simple version is if the user did not initiate the background usage, then it will not be included in the time spent. This has resulted in a significant decrease in smartphone duration on Android devices and a trend break from data prior to Q2 2020. However, while duration did decrease as a result of these changes, smartphone reach metrics remain unaffected.

Nielsen is constantly evaluating its measurement approaches to ensure measurement reflects the most current and comprehensive view of consumer behavior. Mobile ecosystems are also continually evolving, and more and more apps today are updating in the background without the user knowing. Nielsen is always looking to proactively improve measurement and present best-available data.

Be well,

Peter

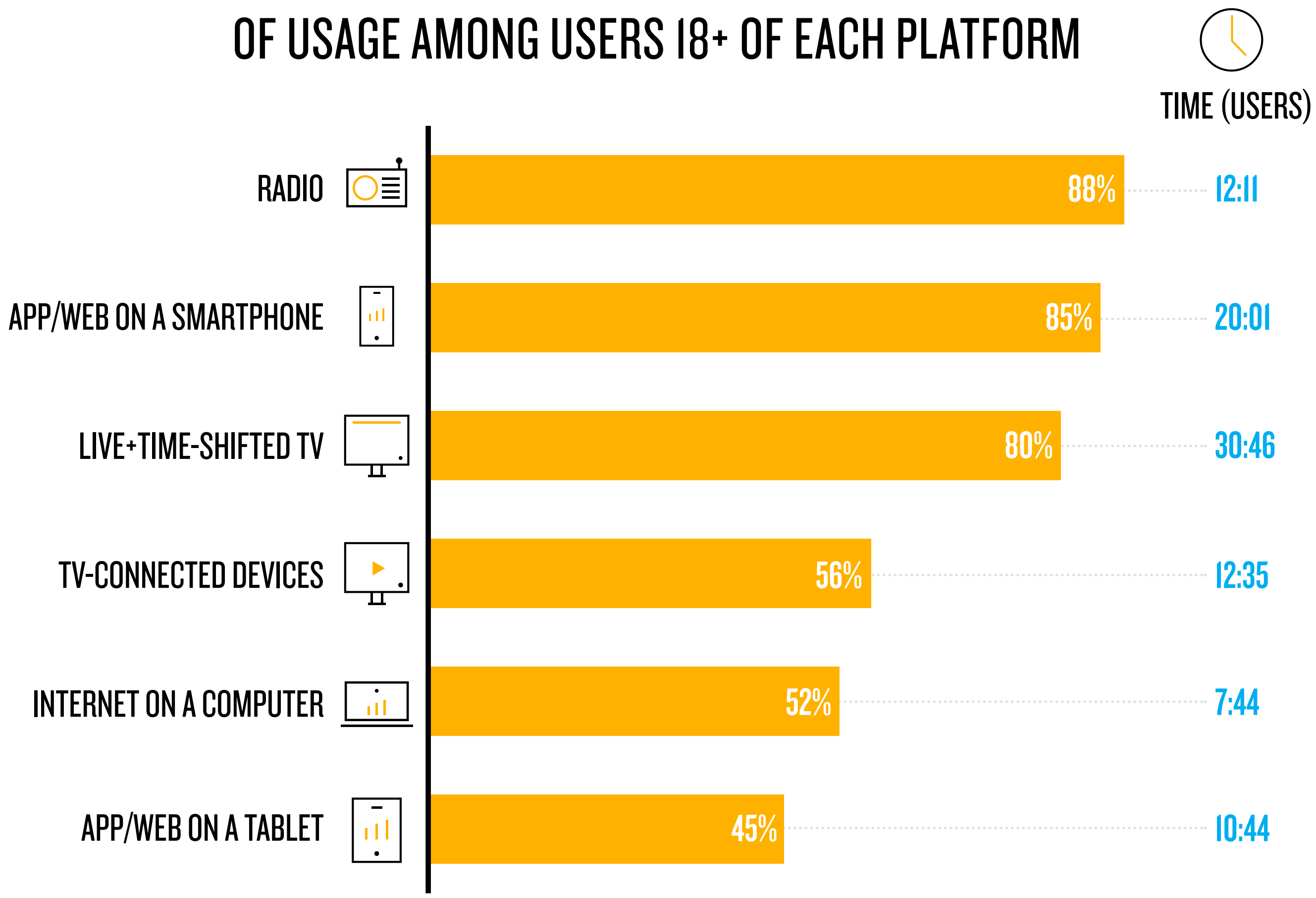
GOLDEN GATES: MEDIA IS THE BRIDGE BETWEEN CAMPAIGNS AND CONSUMERS

Perhaps no other industry has the specter of potential monetary gain or waste than advertising. Each decision has real consequences—from ad campaigns that don't reach their intended target, to ad buys and launches on the wrong platforms, to having misguided brand resonance that doesn't fully engage the consumer. On the flipside, a well-placed, refined campaign strategy can quickly convert brand awareness into sales.

Brands and marketers need to understand their own place in the market in order to capitalize on the best platforms to reach consumers. Conversely, consumer trends can shift seemingly by the minute, so knowing where they are is crucial. Each media platform presents its own unique reach and time spent characteristics, so each marketing decision involves a specific calculus to engage with as many consumers as possible across the platforms in which they spend their time.

In Q3 2020, radio reached 88% of adults in the U.S. each week, and those adults tuned in, on average, for a bit over 12 hours. App/web use on a smartphone was not too far behind, reaching 85% of U.S. adults weekly, who averaged about 20 hours. Marketers have relied on legacy mediums to drive reach at scale, but with the streaming revolution underway, all platforms are viable options when it comes to consumer engagement.

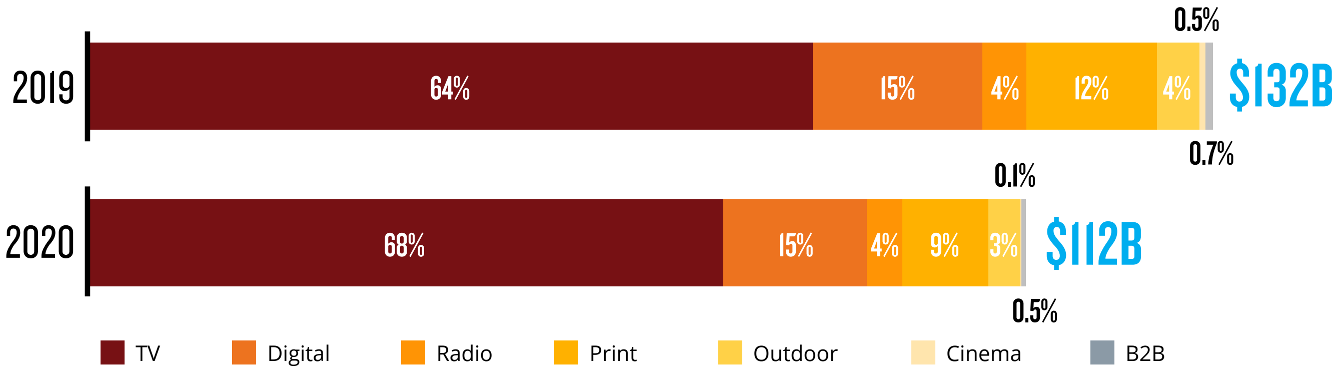
Q3 2020 WEEKLY REACH % AND HOURS:MINS OF USAGE AMONG USERS 18+ OF EACH PLATFORM



The upending personal, societal and economic effect that COVID-19 has had on the world will take years to truly unpack. With regard to the media ecosystem in the U.S., the pandemic has created short-form habitual change across many types of consumers. The desire to perhaps replace commute times with content binges has helped here, and as long as working remotely is an available and accepted practice, any extra time that consumers can devote to content is a marketing opportunity in the making.

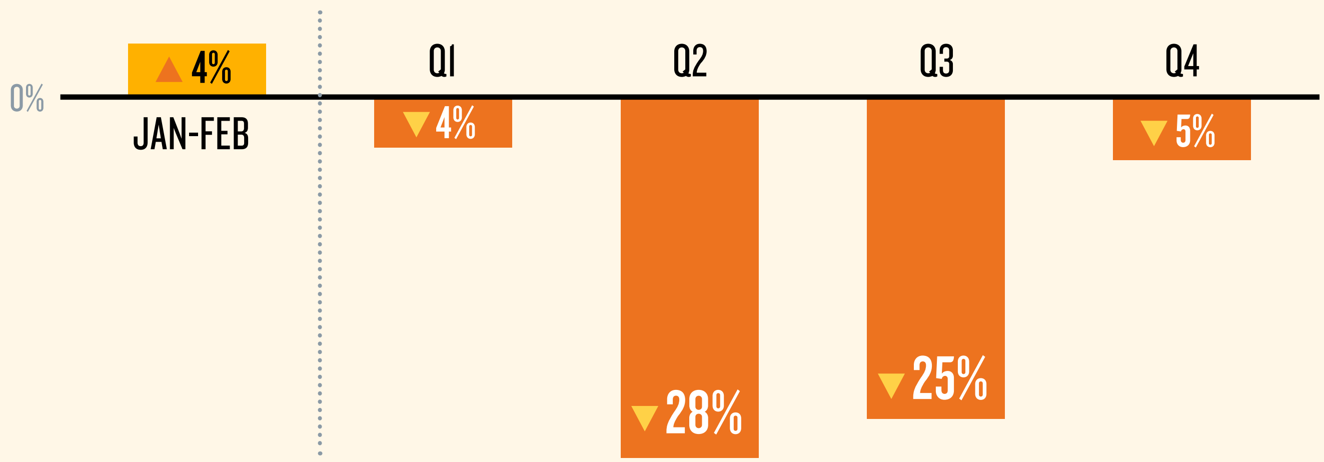
Still, advertising, like many other industries suffered this past year. According to Nielsen Ad Intel, ad spend over the major channels decreased by 15%, or $20 billion, from 2019 to 2020. Within that shrinkage, TV and digital advertising took a more prominent role as the share of both grew. Digital is also where consumer attention has turned to as social distancing mandates have kept a large amount of the workforce at home.

ADVERTISING SPEND COMPOSITION %



The good news is that the hardest days are seemingly behind us. In January and February 2020, prior to any shutdowns, ad spend was up 4% from the year prior. By Q4 2020 declines in spend had slowed considerably and were down just 5% from the closing quarter of 2019. Heading into the spring of 2021, consumers are also feeling more optimistic about returning to some sense of normalcy. According to the Conference Board's Consumer Confidence Index, Q4 2020 confidence in the U.S. was up 16 index points, a clear sign that consumers aren't just willing to to get back to normal, they're starting to feel able to as well. So marketers should be thinking about a population that is eager to emerge from their homes, may be more mobile and might even have saved some discretionary income to spend.

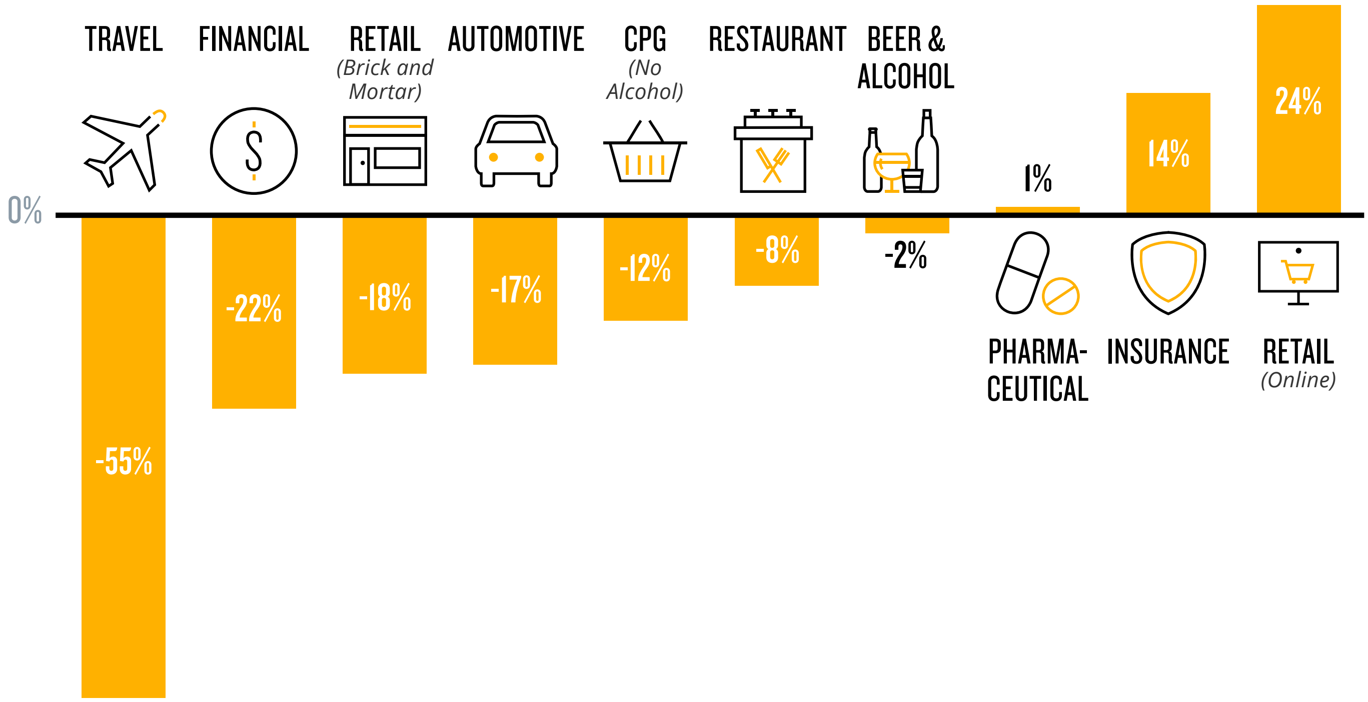
CHANGE IN ADVERTISING SPEND 2019-2020



As an end in sight to COVID-related restrictions began to emerge at the end of last year, advertising began to reflect that level of consumer optimism in the overall market. By Q4 2020, Nielsen Ad Intel reported that advertising spend was back on an upswing, with even socially distanced areas like online retail up 24% year-over-year. As several industries return to "normal" over 2021 there is an anticipation towards seeing improvements in these these sectors reflected in the ad spend.

CHANGE IN ADVERTISING SPEND BY CATEGORY

Q4 2019 - Q4 2020



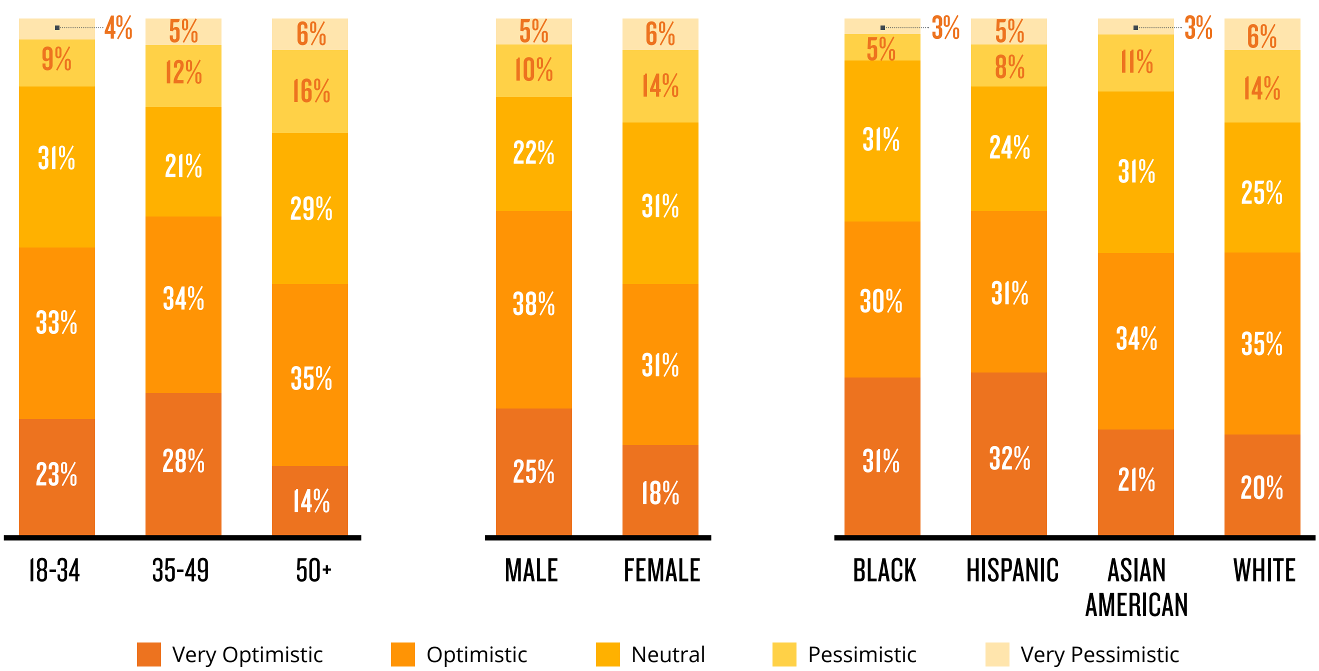
CONSUMERS HAVEN'T LOST SIGHT, OR HOPE, OF RETURNING TO "NORMAL"

It will take some time for all consumers to feel comfortable with mass gatherings, but the tides are beginning to turn. Vaccinations are on the rise and signs are pointing to a slow decline of COVID-19, which has consumers thinking about how they might try to return to normal—or at least a new version of it.

A special advertising survey fielded by Nielsen in February, 2021 found that many consumer segments are optimistic about returning to this "normal" in 2021, and that should be positive news for brands hoping to capitalize on uplifted consumer sentiment. The survey showed that 55% of people said they are very optimistic or optimistic that they could get back to their normal routine in 2021, though genders revealed a different level of this enthusiasm: 63% of adult men noted this optimism, compared with just under half (49%) of adult women.

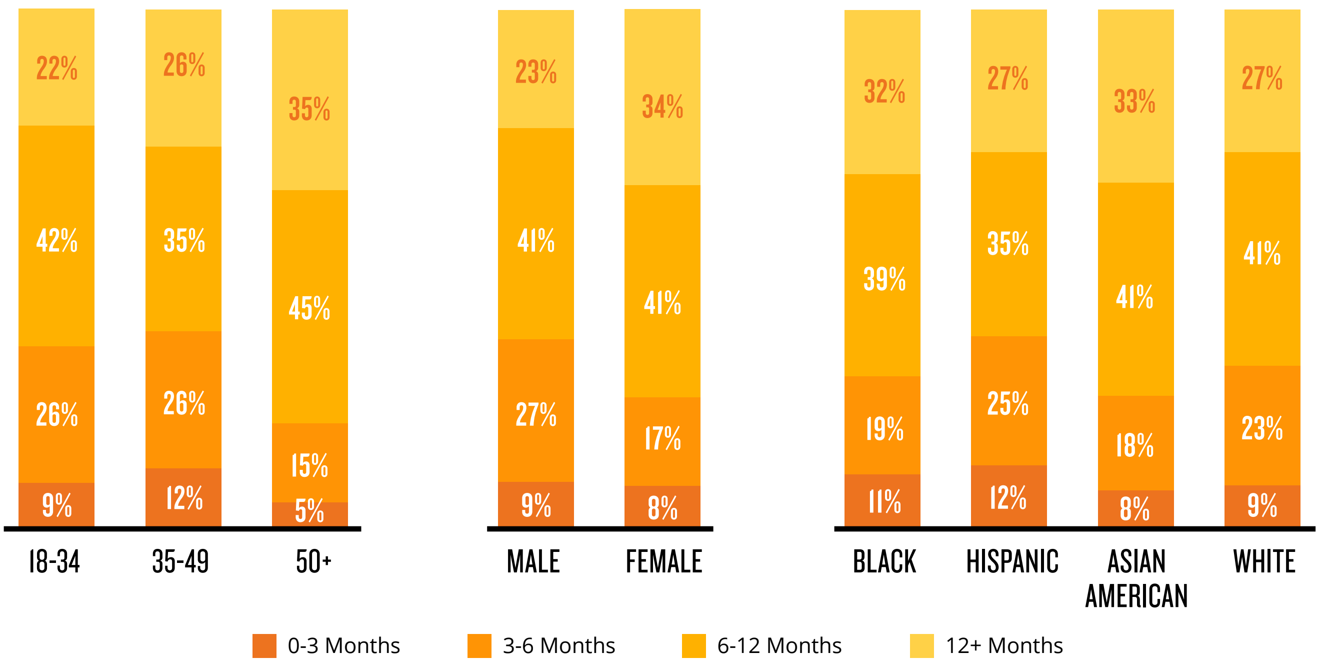
HOW OPTIMISTIC ARE YOU THAT YOU MIGHT BE ABLE TO RESUME YOUR NORMAL ACTIVITIES DURING 2021?

(As of February 2021)



WHEN DO YOU FEEL LIKE YOUR TYPICAL DAY-TO-DAY LIFE AND ACTIVITIES WILL GET BACK TO NORMAL?

(As of February 2021)

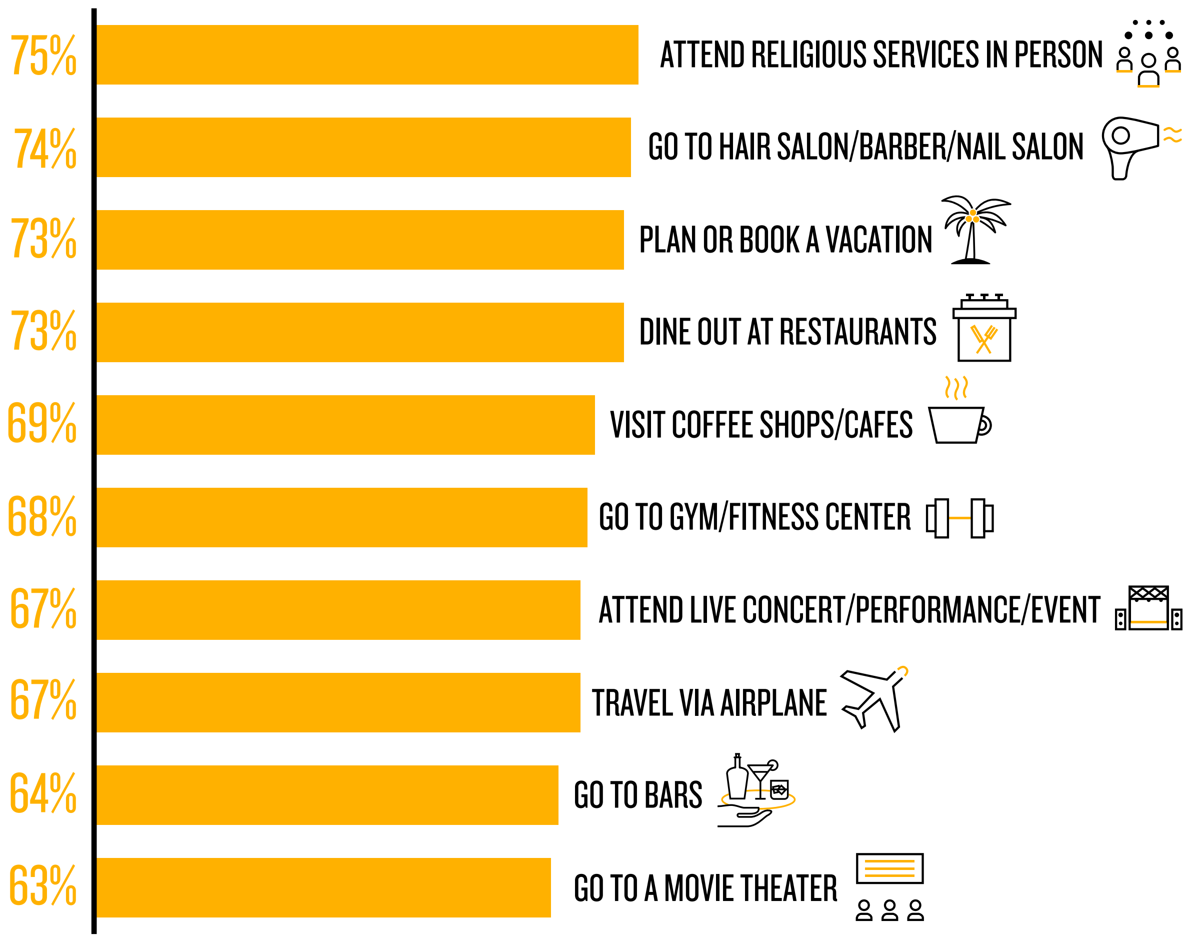


A source of great debate across the country is when Americans can return to their pre-pandemic lifestyles. About one-third (32%) of people surveyed think they will resume their normal activities within the next six months, though adults 35-49 are more optimistic about the timeline, with 38% of that group thinking a return in six months is on the horizon. Only 20% of adults over 50 say this emergence will happen in the next half-year. Hispanics (37%) are most optimistic that activities will resume within six months, while Asian Americans (26%) are least optimistic. One-third of Asian Americans also believe that it will take more than 12 months to get back to normal, the most of any group. Marketers seeking to capitalize on the positive outlook of the people need to take into consideration the specific needs and challenges faced by all groups, and present their messages accordingly and with the proper balance of enthusiasm and empathy.

Travel and tourism marketers take note: Nearly three-fourths (73%) of U.S. consumers are very or somewhat eager to emerge from COVID-19 restrictions and take a vacation. Somewhat surprisingly, even more Americans are looking to satiate their desire for in-person religious services (75%) and engage in a little “spa therapy” (74%). However, it is clear that the majority of consumers are eager to resume all sorts of social activities, whether it’s dining out (73%), working out (68%), or rocking out (67%) at a live concert or performance.

HOW EAGER ARE YOU TO RESUME THESE ACTIVITIES WITHIN 0-3 MONTHS OF COVID RESTRICTIONS BEING LIFTED?

Top 2 Box - Very Eager/Somewhat Eager

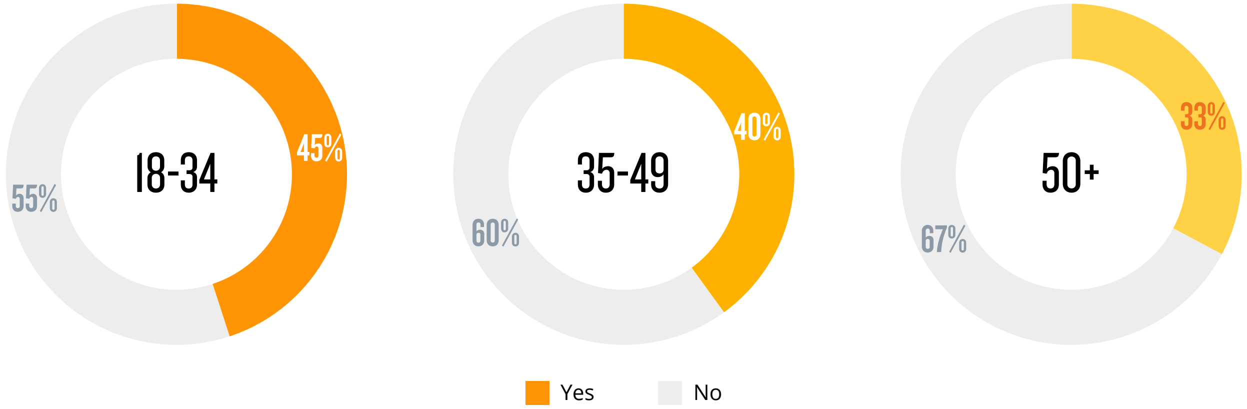


DOLLARS SAVED: REEMERGENCE WILL DRIVE POST-PANDEMIC SALES

While unemployment averages in the U.S. have declined since reaching a peak between April and May last year, restrictions related to COVID-19 continue to dampen some consumer purchases, especially “major” buys such as new vehicles. Last year, auto sales in the U.S. fell to their lowest levels since the fuel-crisis era of the early 1980s. With people staying home more, and given that many vehicle purchases take place in person, last year’s dip isn’t surprising. That said, our survey suggests that auto is poised for accelerated growth in 2021.

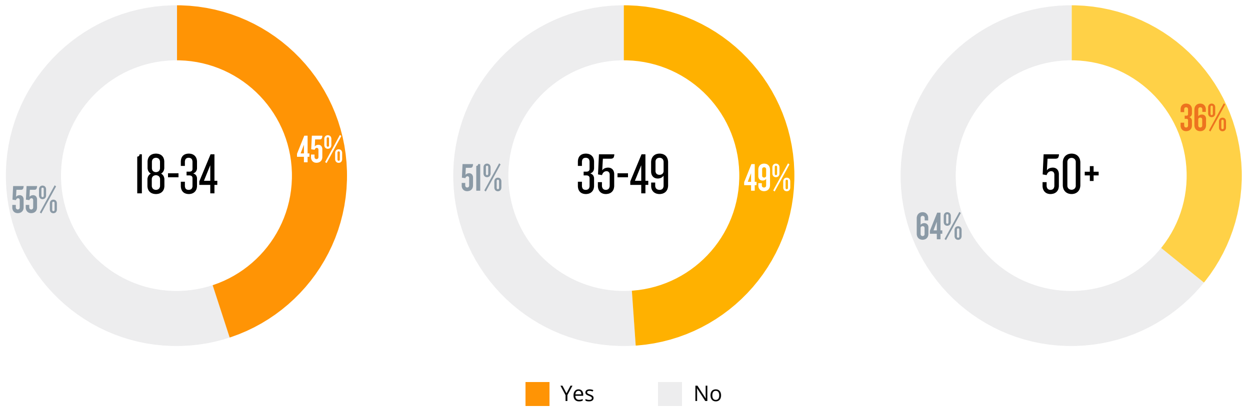
The avoidance of spending on big ticket items has allowed some consumers to save up for major purchases when a reemergence happens. Consider this: between 40%-45% of 18-49 year old consumers attributed saving more money than they normally would to COVID-19 related restrictions. There is a prime opportunity to redirect that savings back into the economy with the right marketing strategy.

HAVE YOU SAVED MORE INCOME THAN YOU TYPICALLY WOULD IN A YEAR BECAUSE COVID-RELATED RESTRICTIONS HAVE HINDERED YOUR ABILITY TO SHOP FOR GOODS OR SERVICES IN PERSON?



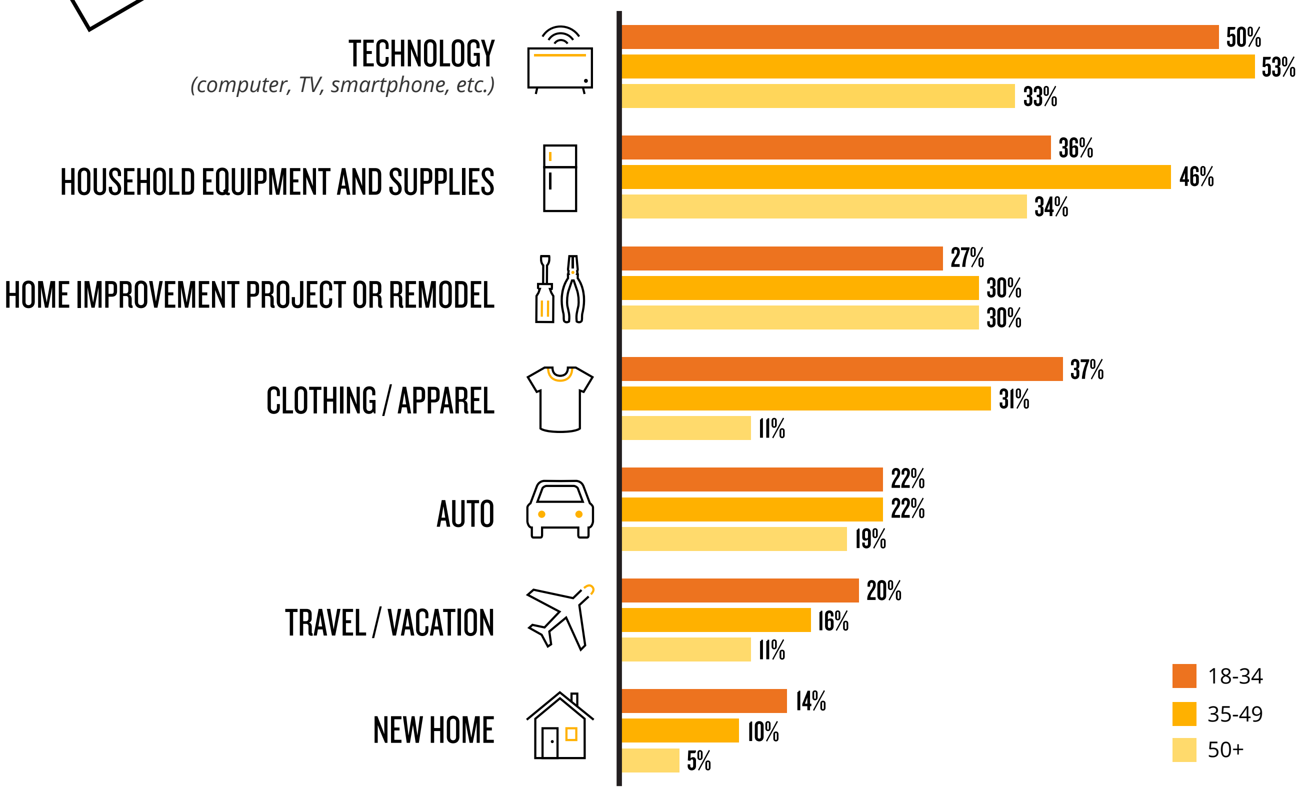
Base: Have not lost the ability to work in 2020

DURING COVID-19 RESTRICTIONS, DID YOU MAKE ANY PURCHASES THAT YOU CONSIDER "MAJOR" ($500+)?



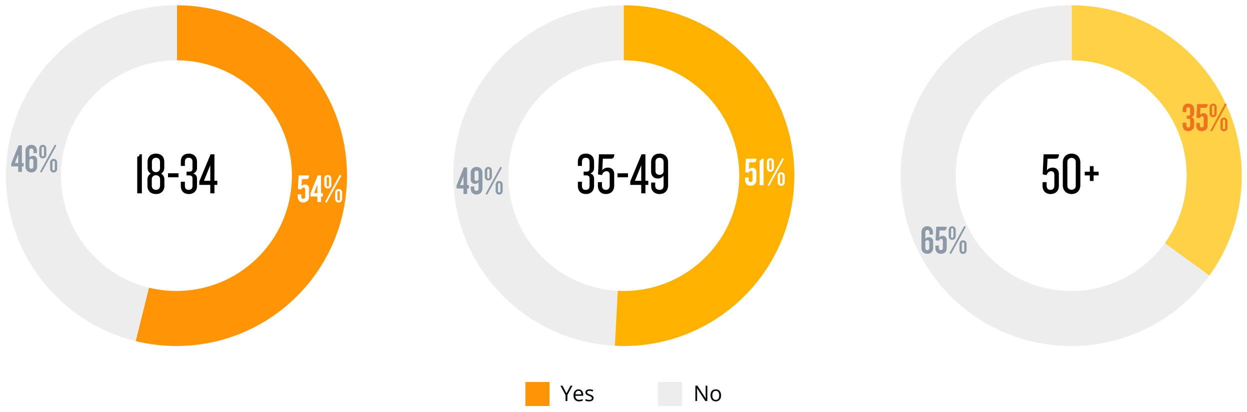
While many adults were able to save money in the past year, not all spending was put on hold. Nearly half of adults 35-49 and 45% of adults 18-34 did make a major ($500+) purchase during 2020. Many of these purchases could play a part in making life easier or more efficient in quarantine, such as tech devices like computers and smartphones, equipment for home improvement projects and household supplies.

WHAT MAJOR PURCHASES ($500+) DID YOU MAKE DURING COVID?



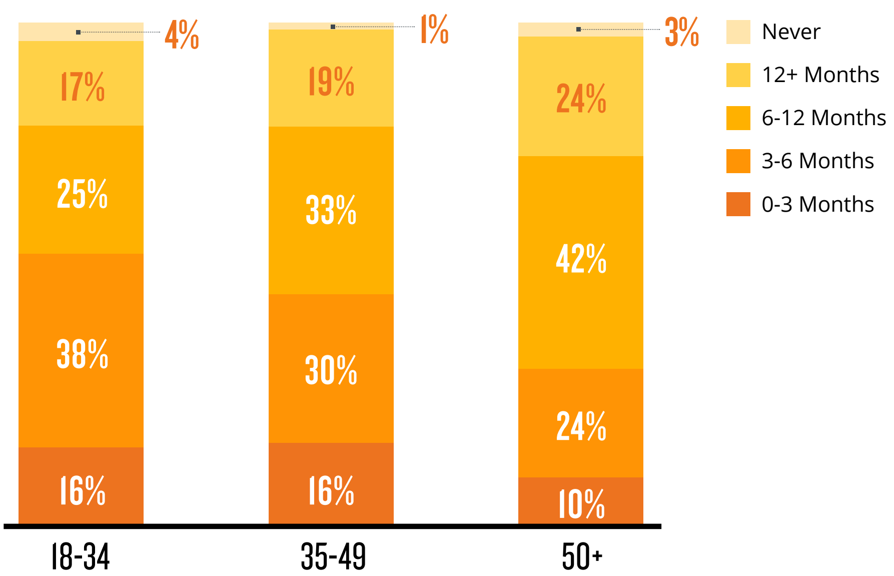
Base: Made a major purchase during COVID restrictions

HAVE YOU POSTPONED A MAJOR PURCHASE ($500+) DUE TO COVID?



While consumers showed that they were still willing to make some major purchases during 2020, many others were put on hold as a result of COVID-19. However, while the economy may have temporarily suffered as a result of the lesser spending, marketers can be encouraged that those purchases have not been permanently shuttered. Sixteen percent of adults 18-49 plan on making the purchase they had postponed within 0-3 months of COVID restrictions being lifted, and only 4% of 18-34 and 1% of 35-49 year old adults have decided that that major purchase will never be made.

HOW SOON AFTER COVID RESTRICTIONS ARE EASED DO YOU THINK YOU WOULD MAKE THAT PURCHASE?



Base: Postponed a major purchase due to COVID

40% OF ADULTS 18+ SAY THAT THEY INTEND TO PURCHASE OR LEASE A NEW/USED VEHICLE IN THE NEXT 12 MONTHS

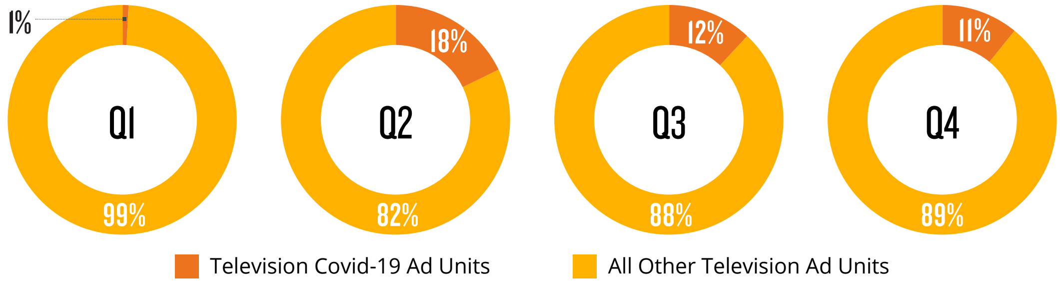
20% OF ADULTS 18+ SAY THAT THEY INTEND TO BUY A NEW HOUSE IN THE NEXT 12 MONTHS

GETTING CREATIVE DURING COVID

The messages being conveyed in advertising are in many ways a reflection of the general tenor of society. Often times, these themes are aspirational in nature, but like all storytelling the presentation is malleable to the world around us.

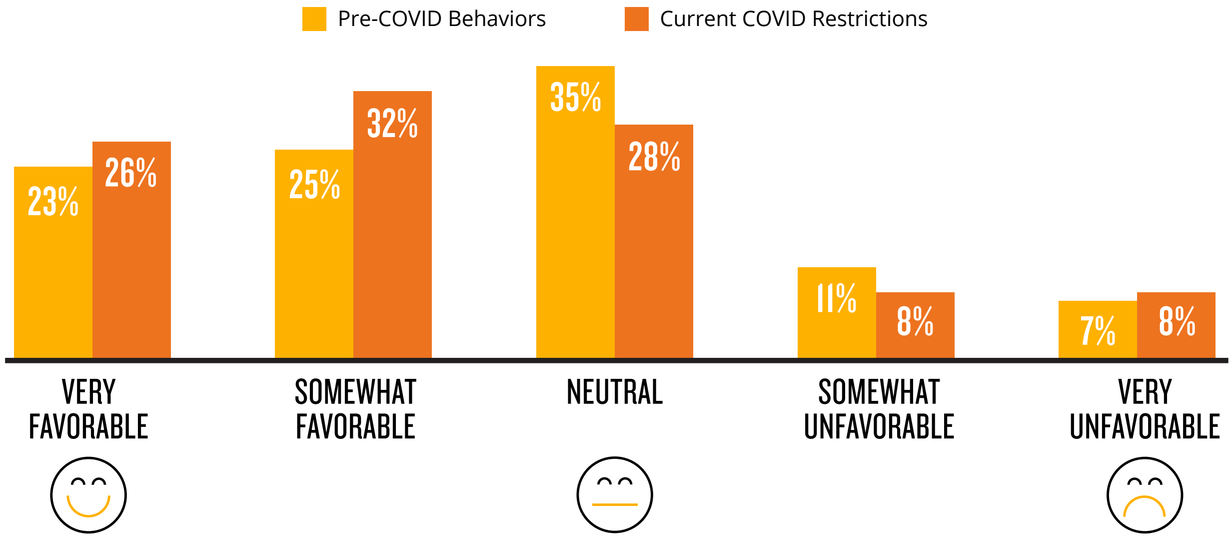
Marketers reacted quickly at the onset of the pandemic to adjust the content and tone of their creative. According to Nielsen Ad Intel, by Q2 2020 18% of all television ads were COVID-themed. As restrictions began to loosen up in Q3 2020 that number declined to 12%, and then again to 11% in Q4 as we continued to move towards a cure.

TELEVISION AD UNIT COMPOSITION % IN 2020



The sudden changes brought about by the pandemic, such as mask wearing and social distancing, also presented a new challenge to marketers. Choices needed to be made whether to present things as they were after March 2020 or as they appeared prior to that date, and each of those decisions could influence people's attitudes towards the advertising. Consumers viewed these ads reflecting the COVID restrictions positively, with 58% feeling favorably about the advertising, compared to 48% showing pre-COVID behaviors. Fewer consumers also had negative reactions to the COVID advertising, with 16% viewing them unfavorably compared to 18% pre-COVID.

AT PRESENT, HOW FAVORABLE DO YOU FIND COMMERCIALS OR ADVERTISING DISPLAYING PRE-COVID AND CURRENT COVID BEHAVIORS (MASKS, SOCIAL DISTANCING, ETC.)?



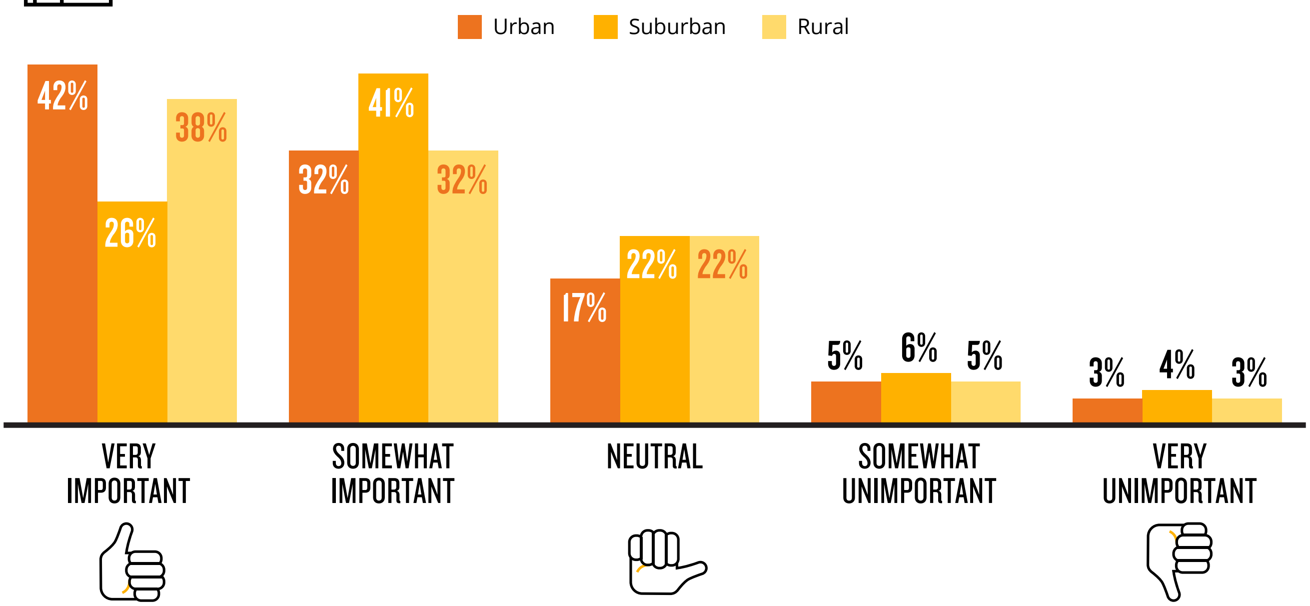
Base: Watch TV

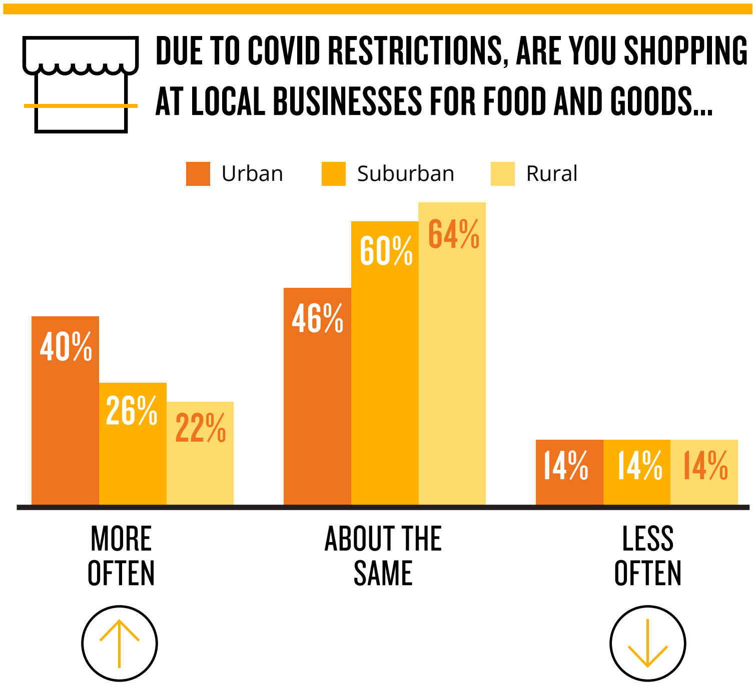
HOME FIELD ADVANTAGE: LIVING LOCAL MEANS BUYING LOCAL

Over the past year most consumer's professional and social footprints have shrunk considerably. With social distancing restrictions, remote schooling, and the emergence of the work from home lifestyle, travelling great distances for any type of shopping has also become less likely. Perhaps as a result, the desire to support local businesses is more immediate, even if it means doing so in person. Convenience and pragmatism plays a role, but there are also a multitude of benefits to seeing one's local area survive and thrive.

While our survey shows that this of importance to all consumers, where "home" is does play somewhat of a factor in the emphasis placed on patronizing local businesses. Nearly three-fourths of urban dwellers (74%) felt it was very or somewhat important to shop in person at local businesses, compared to 67% of suburban and 70% of rural residents. Regardless of where one lives, the majority of respondents agree that it is important to shop local. Less than 10% viewed shopping in person at local businesses as somewhat or very unimportant.

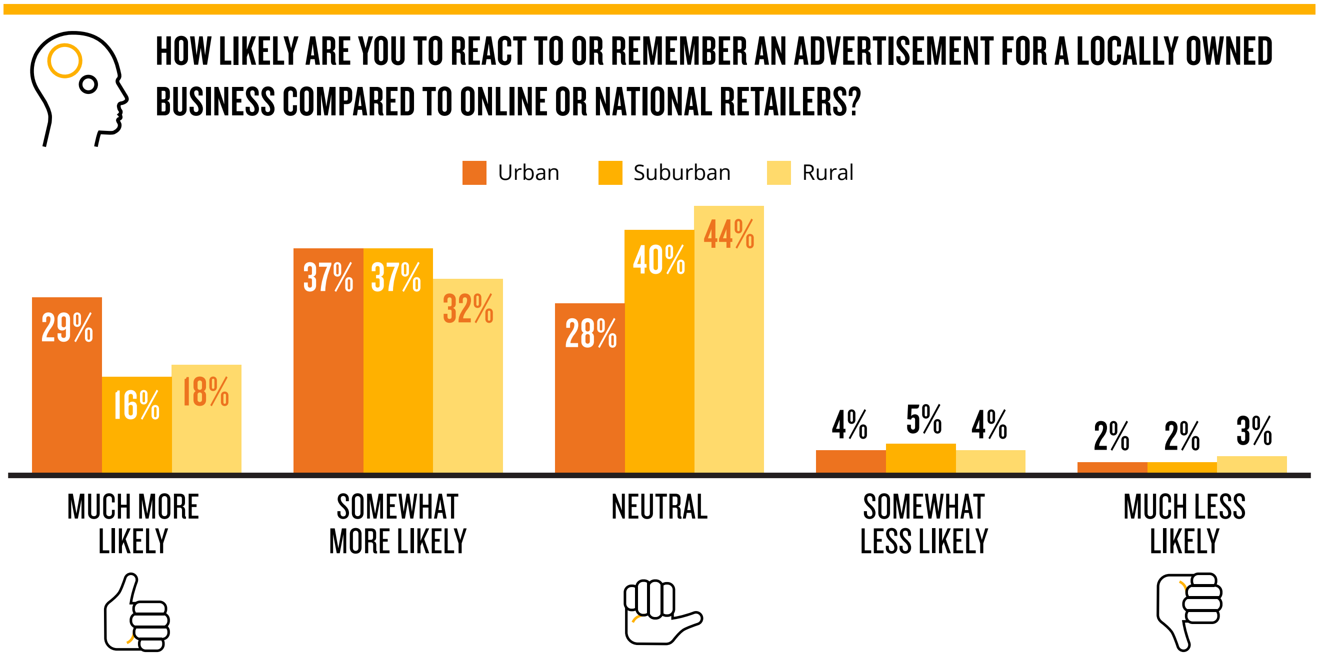
DUE TO COVID RESTRICTIONS IN THE AREA YOU LIVE, HOW IMPORTANT IS IT TO YOU TO SHOP IN PERSON AT LOCAL BUSINESSES?





Consumers not only believe that shopping locally is important, they are backing it up. Forty percent of urban, 26% of suburban, and 22% of rural residents say they are shopping more often at local businesses now than before the pandemic. Proximity to home or work, mode of transportation, or the number of businesses in the area may all factor in to people's personal preferences here, but it does appear that a concerted effort is being made.

Advertising can have an effect on the local level as well. Two-thirds of residents from urban neighborhoods are much more or somewhat more likely to react to or remember advertising for locally owned businesses, compared to online or national retailers. As with the importance of shopping in person, all consumers are impacted by local advertising in some way. Fewer than 7% are somewhat or much less likely to react to local advertising, showing that it doesn't always take the biggest budget or flashiest campaign to resonate with people.

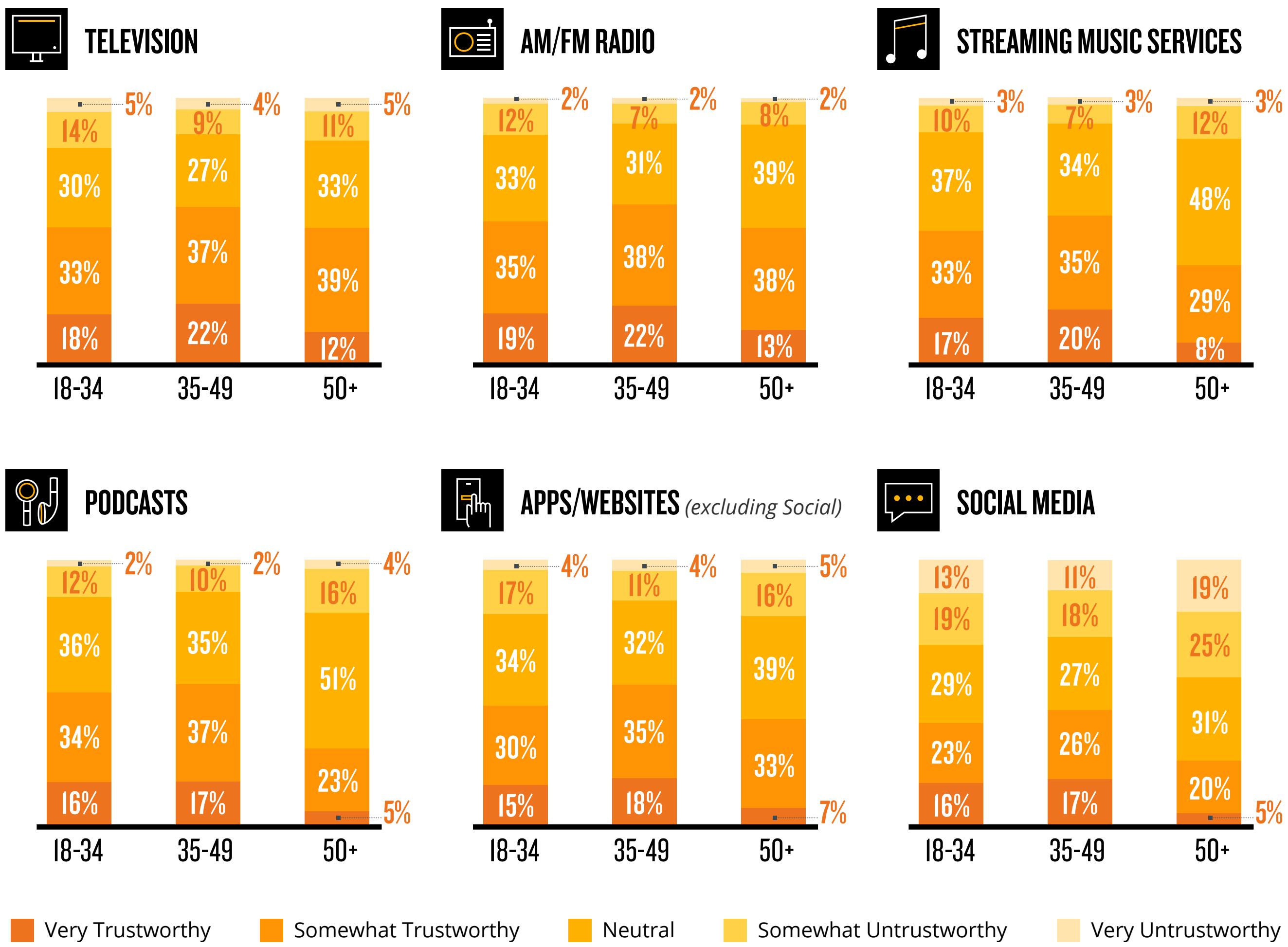


ADVERTISING TRUST ACROSS PLATFORMS

With consumers being bombarded with information from all angles and on every device they own, it's more difficult than ever for campaigns to break through. Layer onto that a culture of deep fakes, false news, fact checks and bot reviews, and it's understandable that consumer trust in advertising differs for each platform.

For consumers, legacy platforms such as radio and TV still command the highest share of collective trust in advertising. Sixty percent of adults 35-49 and 54% of adults 18-34 consider radio spots very or somewhat trustworthy, with TV slightly below that at 59% for 35-49 and 51% for 18-34. To marketers this should come as no shock, considering that the decades-old mediums have been constant companions in family rooms and automobiles a lot longer than more nascent technology. They should also understand that consumers are multi-taskers, second screen users, and many are also influenced by social media.

HOW TRUSTWORTHY WOULD YOU CONSIDER THE CLAIMS MADE IN ADVERTISEMENTS YOU EXPERIENCE ON THE FOLLOWING PLATFORMS?



Base: Users of each media type

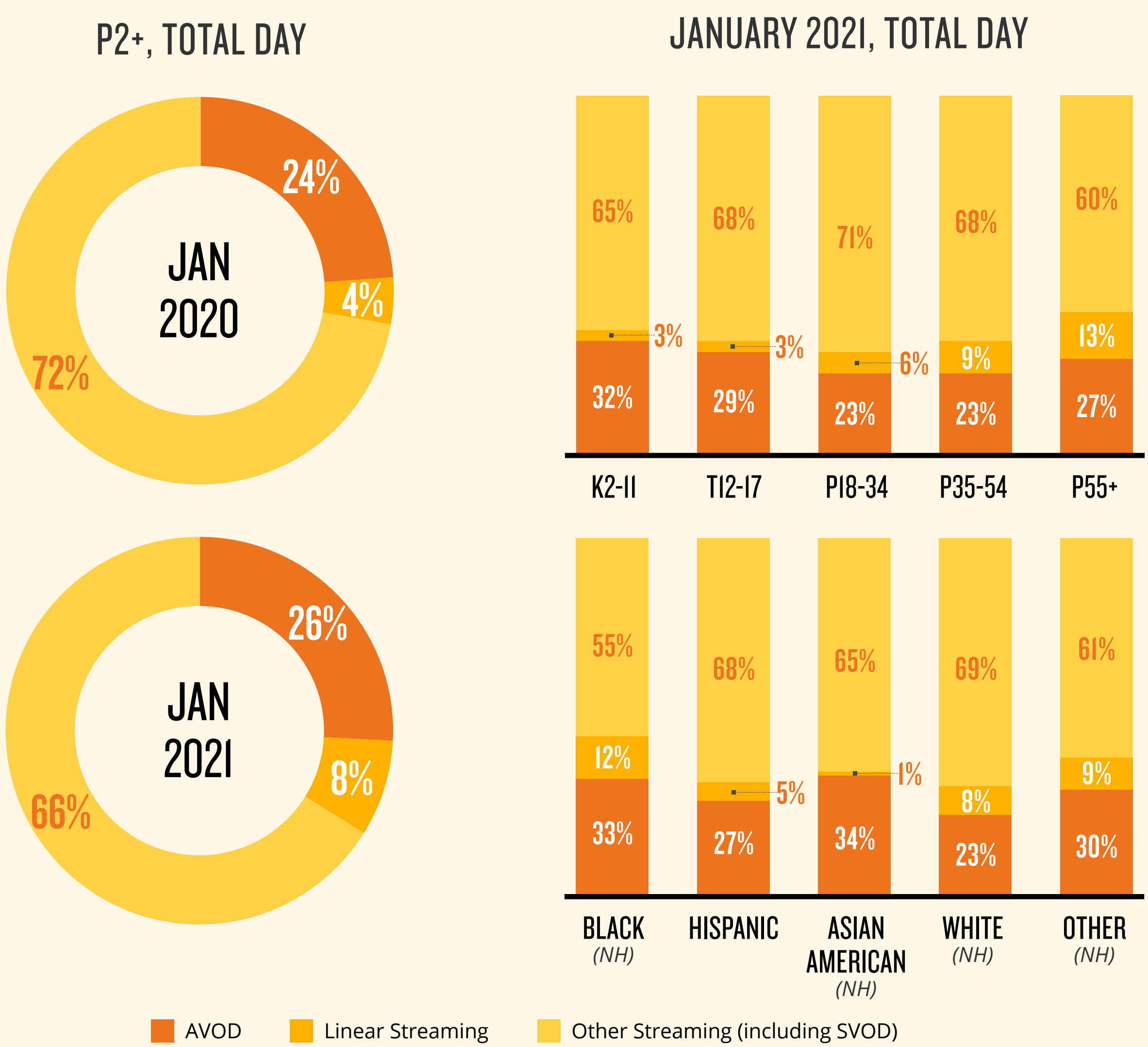
ADVERTISING THROUGH STREAMING VIDEO

The more connected consumers get the more they're engaging with streaming video services, whether they are subscription based (such as Netflix, Disney+ and Amazon Prime Video), ad-supported, or AVOD (such as Hulu or Peacock) or linear streaming through cable provider apps.

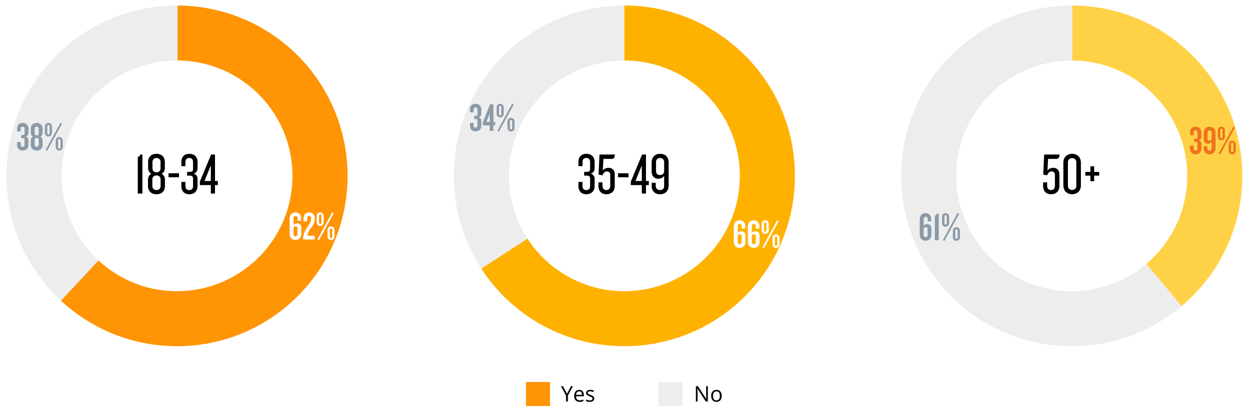
According to data from Nielsen's Streaming Meter, ad-supported and linear streaming platforms have grown to account for over one-third of the total share of streaming in January 2021 among homes that are capable of doing so. That's up from 28% the year prior, and represents a growing marketing opportunity for brands.

This is especially relevant considering the share of streaming is even more pronounced by demographic. In Black homes, for example, 45% of total streaming came from AVOD and linear services this past January, while Asian American households had the highest amount of their streaming (34%) coming from AVOD.

SHARE OF STREAMING AMONG STREAMING CAPABLE HOMES



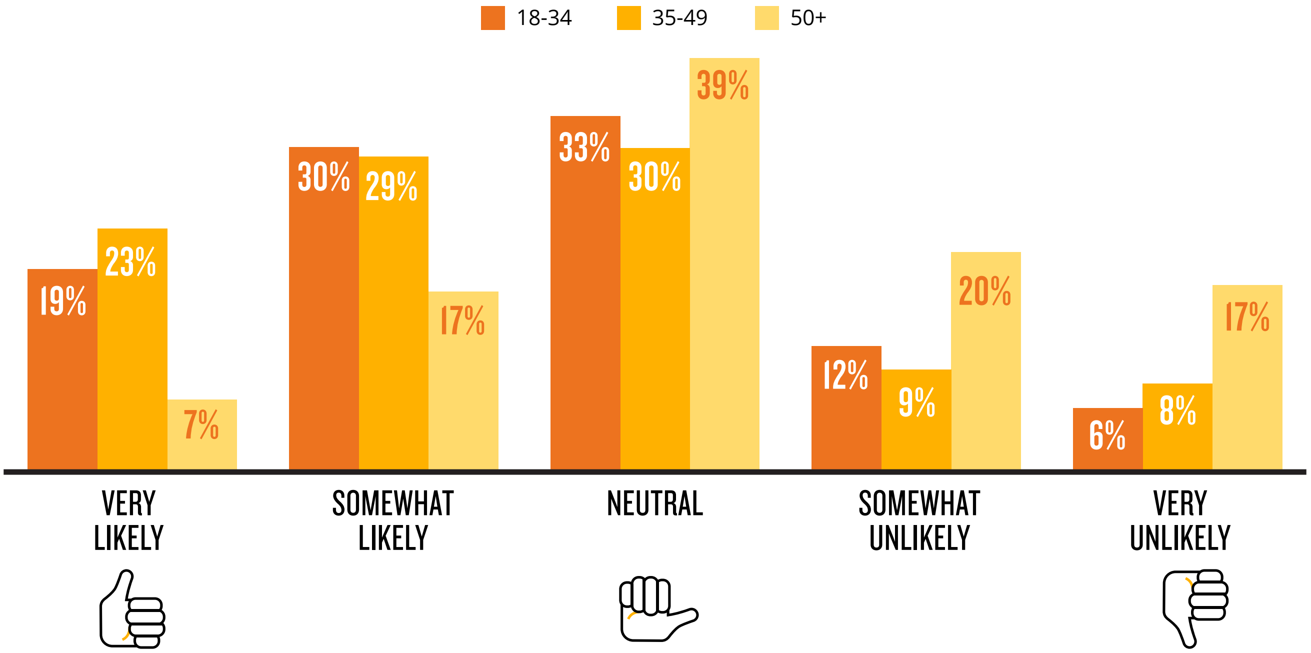
HAVE YOU NOTICED SPECIFIC PRODUCTS OR BRANDS BEING USED BY THE CHARACTERS WITHIN THE CONTENT ON A STREAMING VIDEO SERVICE?



Base: Streaming video service user

Consumer sentiment backs up the brand opportunity in traditionally non-ad supported environments, too. In fact, 66% of people 35-49 and 62% of those 18-34 said they've actually taken note of brands being used by the characters in streaming content they've watched. What's more is that 52% of consumers 35-49 and 49% of people 18-34 said they are influenced to purchase the products they've seen being used in streaming video content.

HOW LIKELY ARE YOU TO BE INFLUENCED OR TO PURCHASE A BRAND, PRODUCT OR SERVICE THAT IS USED WITHIN THE STREAMING VIDEO CONTENT ITSELF?



Base: Streaming video service user

KICKING THE COMPETITION: A STREAMING CASE STUDY ON BRANDED OPPORTUNITIES

Branding opportunities in streaming don't begin and end with ad-supported content. In fact, brands that only target viewers with linear TV ads are missing a growing portion of the video viewing public. For example, data from Nielsen SVOD Content Ratings shows that between Aug. 28 and Sept. 3, 2020, 10.4% of viewers of Karate Kid's streaming reboot, *Cobra Kai*, didn't watch any linear TV.

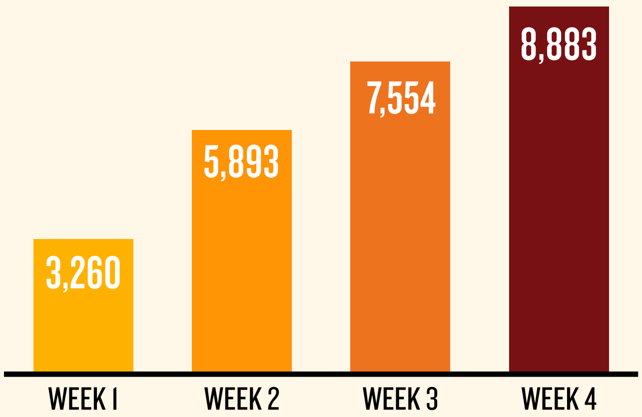
So what's preventing brands and advertisers from including more brand integrations, and most notably, SVOD original brand integrations, into their portfolios? There are two primary challenges: lead time and measurement. First, it takes time and preparation to seamlessly integrate a brand into a script and the content. This also takes expertise and forethought. But the ability to measure and steward the effort in ways similar to that of the time-proven unit of advertising—the 30-second spot—is also a hurdle. To help in this regard, Nielsen, in conjunction with clients, has developed a new metric that allows for SVOD brand integrations to be tracked in ways that put it on the same playing field as traditional advertising. It also illuminates both delivery and incremental reach.

To illustrate how agencies and advertisers can use this metric, Nielsen recently analyzed the viewership of *Cobra Kai* to assess the equivalized value of the branded integrations within the first four weeks the program was available to stream. Using the traditional 30-second spot as a baseline, the methodology adjusts for duration and integration type to arrive at weighted, equivalized impressions. Importantly, it takes the valuation process out of the black box and provides full visibility of the value of branded integrations in the SVOD space. That visibility means that advertisers and agencies now know that they reach their target and get what they pay for.

ENTERPRISE BRANDING IN COBRA KAI (NETFLIX)

EXOTIC MODEL KIOSK

Gross (Equivalized and Weighted) Impressions (000) - P21+



Source: SVOD Brand Integration Content Ratings 8/27-9/4/20

Enterprise is one of the brands that *Cobra Kai* weaves into the storyline. And in the first four weeks of being available on Netflix, seasons 1/2 of *Cobra Kai* delivered Enterprise more than 8 million impressions to viewers 21+, a key age demo for car renters.

The reach and influence of campaigns in this emerging area is a tantalizing opportunity for brands that should be too good to pass on!

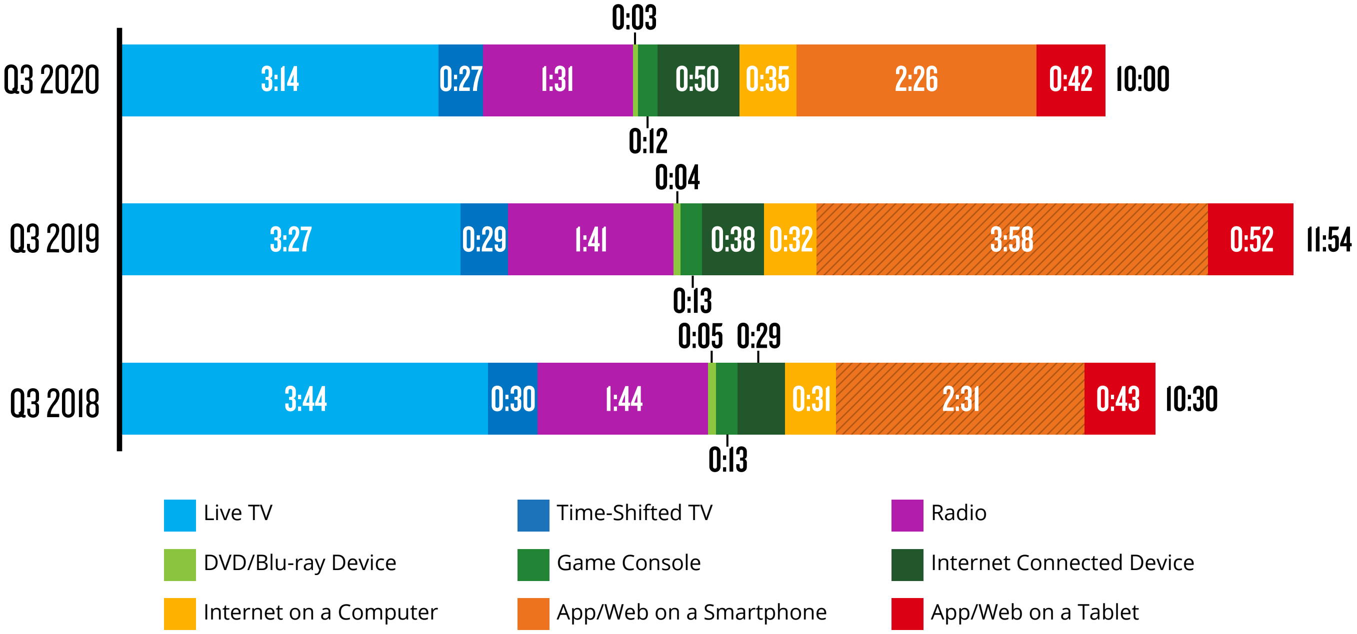
OVER THE FIRST 4 WEEKS, COBRA KAI DELIVERED OVER 8MM P21+ (E&W) IMPRESSIONS FOR ENTERPRISE

Q3 2020 CHARTS

MEDIA CONNECTED CONSUMERS

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

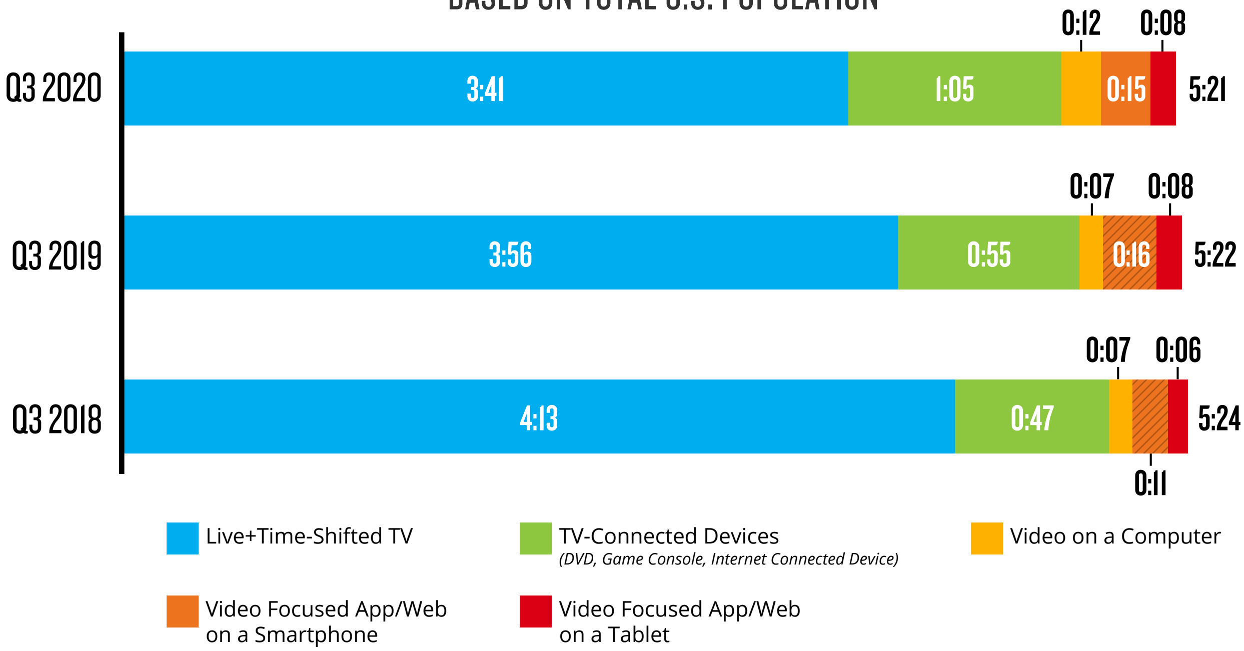
BASED ON TOTAL U.S. POPULATION



Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage. In May 2020 smartphone measurement was updated to more precisely capture users' intended behavior versus app/web activity occurring in the background. Smartphone data shaded in the chart is not able to be trended with current data.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

BASED ON TOTAL U.S. POPULATION



Note: In May 2020 smartphone measurement was updated to more precisely capture users' intended behavior versus app/web activity occurring in the background. Smartphone data shaded in the chart is not able to be trended with current data.

WEEKLY REACH ACROSS PLATFORMS

Q3 2020 WEEKLY REACH % OF USERS 18+ AMONG U.S. POPULATION

LIVE+TIME-SHIFTED TV

	Total	Black	Hispanic	Asian American	White
Reach	80%	81%	76%	65%	81%
YOY Change	-4%	-6%	-7%	-2%	-4%

RADIO

	Total	Black	Hispanic	Asian American	White
Reach	88%	87%	92%	NA	85%
YOY Change	-4%	-4%	-4%	NA	-4%

DVD/BLU-RAY DEVICE

	Total	Black	Hispanic	Asian American	White
Reach	8%	6%	6%	5%	9%
YOY Change	-3%	-3%	-2%	-2%	-3%

INTERNET ON A COMPUTER

	Total	Black	Hispanic	Asian American	White
Reach	52%	48%	41%	59%	54%
YOY Change	-2%	0%	-2%	-4%	-3%

GAME CONSOLE

	Total	Black	Hispanic	Asian American	White
Reach	12%	12%	13%	10%	12%
YOY Change	-2%	-3%	-2%	-1%	-2%

APP/WEB ON A SMARTPHONE

	Total	Black	Hispanic	Asian American	White
Reach	85%	86%	85%	87%	84%
YOY Change	0%	0%	-2%	-1%	0%

INTERNET CONNECTED DEVICE

	Total	Black	Hispanic	Asian American	White
Reach	49%	46%	52%	54%	49%
YOY Change	5%	4%	5%	5%	6%

APP/WEB ON A TABLET

	Total	Black	Hispanic	Asian American	White
Reach	45%	40%	43%	50%	46%
YOY Change	-1%	-3%	0%	-1%	-1%

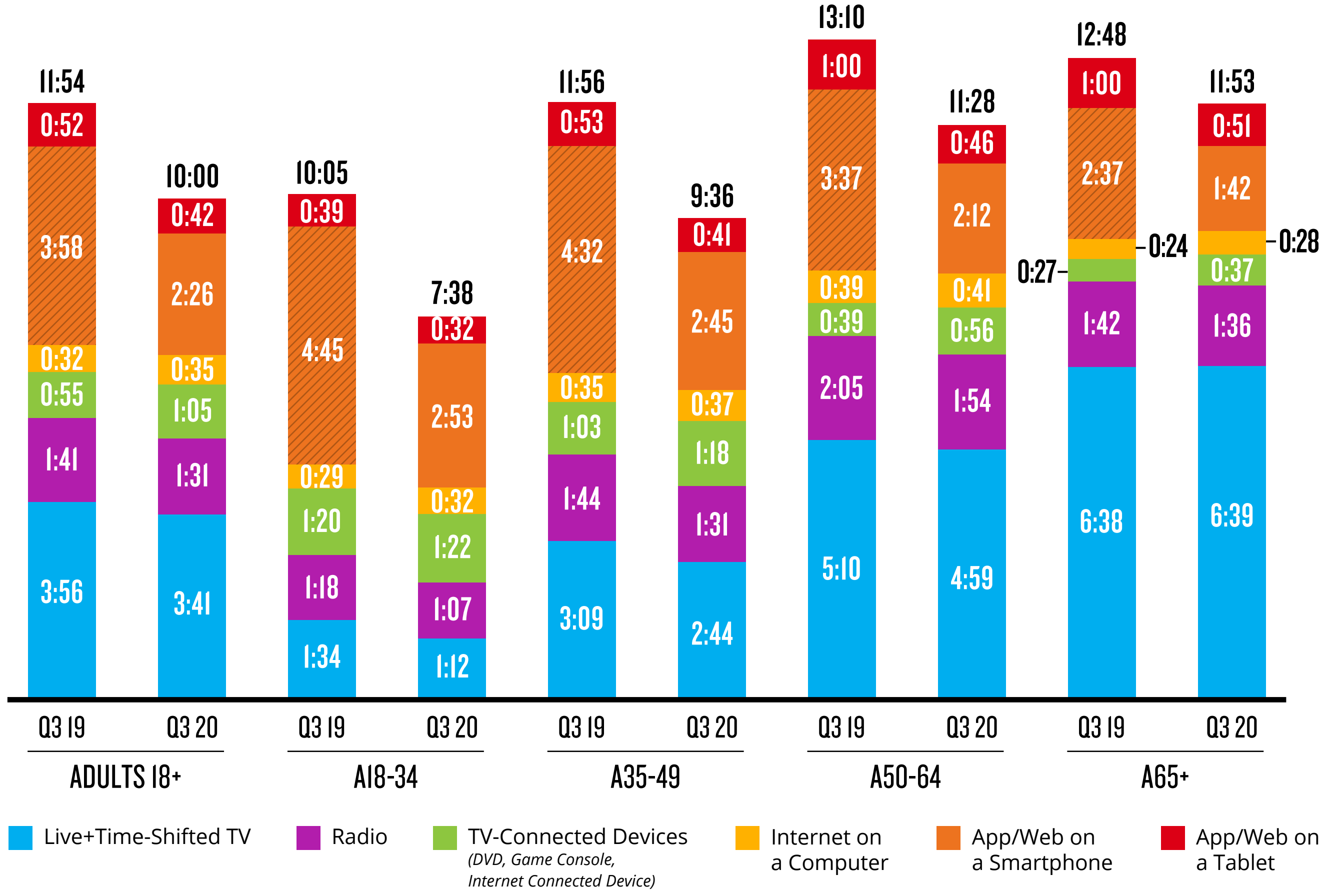
Total Black Hispanic Asian American White YOY Change

Radio measurement includes Asian Americans but cannot be separated from the total audience at this time.
Radio measurement for White is inclusive of non-Black and non-Hispanic.

MEDIA TIME BY DEMOGRAPHIC

DAILY HOURS:MINS OF USAGE

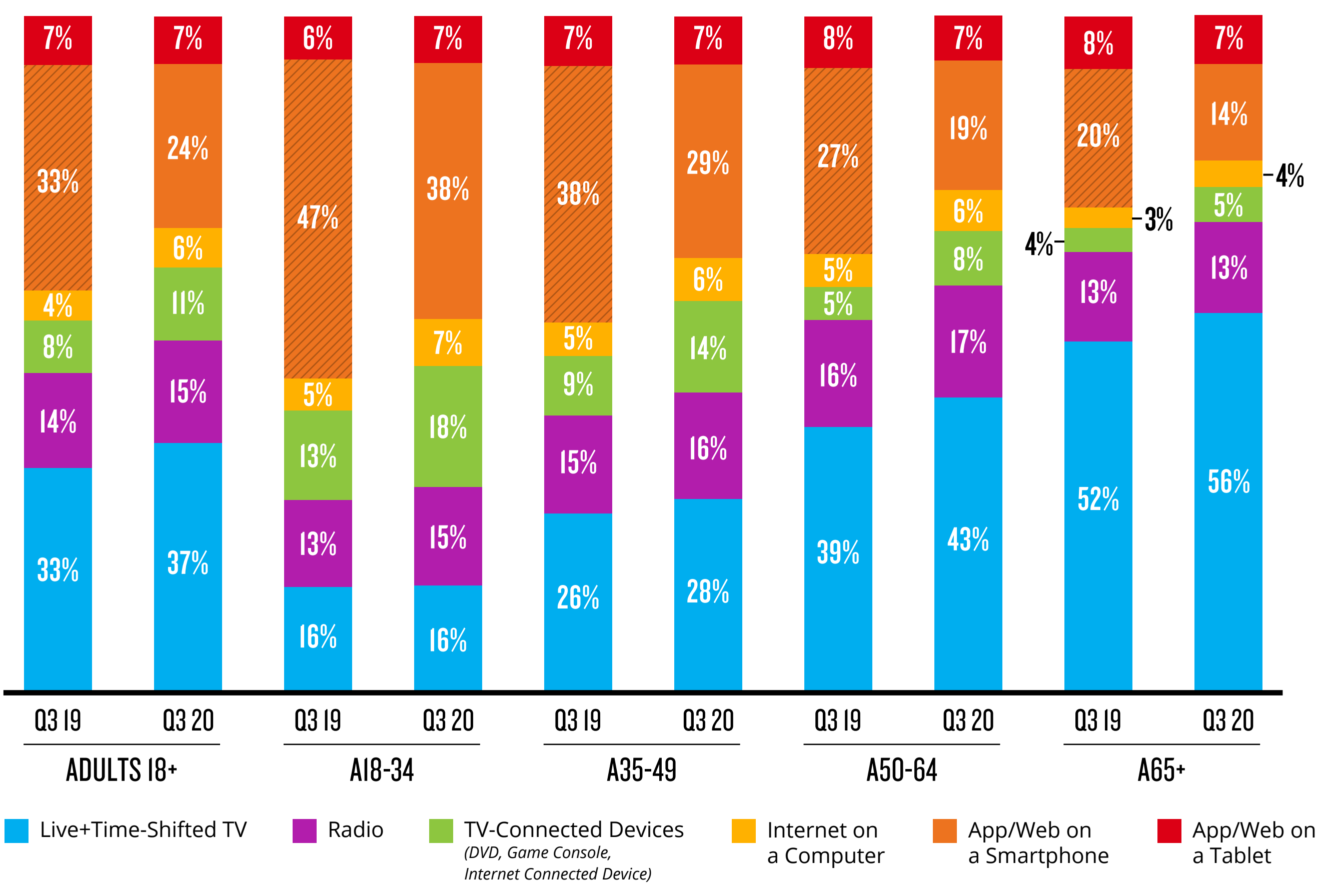
BASED ON TOTAL U.S. POPULATION



Note: In May 2020 smartphone measurement was updated to more precisely capture users' intended behavior versus app/web activity occurring in the background. Smartphone data shaded in the chart is not able to be trended with current data.

SHARE OF DAILY TIME SPENT BY PLATFORM

BASED ON TOTAL U.S. POPULATION



Note: In May 2020 smartphone measurement was updated to more precisely capture users' intended behavior versus app/web activity occurring in the background. Smartphone data shaded in the chart is not able to be trended with current data.

THE MULTICULTURAL CONSUMER

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	Q3 2019	Q3 2020	Q3 2019	Q3 2020	Q3 2019	Q3 2020	Q3 2019	Q3 2020	Q3 2019	Q3 2020
Live TV	3:27	3:14	5:04	4:39	2:29	2:15	1:42	1:46	3:26	3:15
Time-shifted TV	0:29	0:27	0:29	0:25	0:16	0:14	0:13	0:13	0:31	0:30
Radio	1:41	1:31	1:46	1:34	1:43	1:31	NA	NA	1:39	1:30
DVD/Blu-ray Device	0:04	0:03	0:04	0:03	0:03	0:03	0:03	0:02	0:04	0:03
Game Console	0:13	0:12	0:16	0:13	0:12	0:12	0:07	0:08	0:12	0:11
Internet Connected Device	0:38	0:50	0:47	1:00	0:39	0:54	0:42	0:57	0:36	0:48
Internet on a Computer	0:32	0:35	0:23	0:29	0:20	0:23	0:40	0:44	0:34	0:36
App/Web on a Smartphone	3:58	2:26	4:46	2:34	4:08	2:34	3:56	2:32	3:49	2:23
App/Web on a Tablet	0:52	0:42	0:51	0:40	0:44	0:36	0:55	0:45	0:53	0:43
Total	**11:54**	**10:00**	**14:26**	**11:37**	**10:34**	**8:42**	**8:18***	**7:07***	**11:44**	**9:59**

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

Radio measurement for White is inclusive of non-Black and non-Hispanic.

Note: In May 2020 smartphone measurement was updated to more precisely capture users' intended behavior versus app/web activity occurring in the background. Q3 2019 App/Web on a Smartphone data is not able to be trended with Q3 2020.

DATA TABLES

Q3 2020 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+	WHITE 18+
Total Use of Television	33:21	17:58	28:11	41:28	50:55	22:35	27:07	44:14	25:17	21:43	33:28
Live+Time-Shifted TV	25:47	8:26	19:05	34:56	46:34	13:15	17:45	35:27	17:21	13:52	26:12
Time-Shifted TV	3:07	0:54	2:29	4:18	5:28	1:37	2:14	2:55	1:39	1:30	3:27
TV-Connected Devices	7:34	9:32	9:06	6:31	4:21	9:20	9:21	8:48	7:55	7:51	7:17
DVD/Blu-ray Device	0:22	0:14	0:25	0:28	0:23	0:19	0:23	0:20	0:20	0:15	0:24
Game Console	1:22	2:56	1:30	0:26	0:08	2:17	1:51	1:30	1:21	0:58	1:20
Internet Connected Device	5:50	6:21	7:11	5:37	3:50	6:44	7:07	6:57	6:15	6:37	5:33
Radio	10:37	7:52	10:34	13:20	11:15	9:05	10:13	10:59	10:34	na	10:28
Internet on a Computer	4:03	3:45	4:20	4:47	3:15	4:01	4:23	3:24	2:43	5:06	4:12
Social Networking	0:36	0:25	0:35	0:49	0:37	0:29	0:36	0:23	0:18	0:44	0:39
Video on a Computer	1:22	1:43	1:34	1:19	0:44	1:39	1:38	1:23	0:56	1:45	1:22
App/Web on a Smartphone	16:59	20:12	19:16	15:26	11:51	19:47	19:36	18:00	18:00	17:44	16:40
Video Focused App/Web on a Smartphone	1:44	2:51	1:52	1:06	0:48	2:25	1:58	2:23	2:42	1:37	1:34
Streaming Audio	0:43	1:14	0:43	0:29	0:16	1:00	0:49	0:42	0:46	0:48	0:42
Social Networking	4:16	6:14	4:44	3:17	2:14	5:33	5:14	4:39	4:57	4:32	4:08
App/Web on a Tablet	4:53	3:44	4:46	5:22	6:00	4:12	4:39	4:38	4:11	5:17	4:58
Video Focused App/Web on a Tablet	0:53	0:55	1:02	0:50	0:44	0:58	1:03	1:00	0:57	0:57	0:51
Streaming Audio	0:07	0:11	0:07	0:05	0:04	0:09	0:10	0:10	0:05	0:08	0:06
Social Networking	0:40	0:34	0:35	0:42	0:50	0:35	0:37	0:40	0:36	0:43	0:40

Note: Internet Connected Device is inclusive of Smart TV app usage.

Q3 2020 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+	WHITE 18+
Total Use of Television	36:44	21:50	30:15	43:05	52:39	25:59	29:46	48:04	28:00	27:22	36:12
Live+Time-Shifted TV	30:46	12:03	22:18	37:30	48:47	17:21	21:39	40:51	21:31	20:35	30:27
Time-Shifted TV	6:25	2:38	4:42	7:25	10:00	3:50	4:36	5:52	4:25	4:18	6:45
TV-Connected Devices	12:35	14:52	12:52	11:09	9:52	13:53	13:31	15:27	12:39	12:47	12:04
DVD/Blu-ray Device	4:15	4:31	4:38	4:19	3:38	4:35	4:38	5:26	4:54	4:38	4:05
Game Console	10:34	12:41	8:50	7:12	5:55	11:12	10:11	11:48	9:22	9:19	10:22
Internet Connected Device	11:10	11:37	11:24	10:52	10:17	11:31	11:38	13:58	11:15	11:36	10:39
Radio	12:11	9:25	11:52	14:37	13:17	10:33	11:33	12:35	11:30	na	12:17
Internet on a Computer	7:44	7:35	7:40	8:29	7:00	7:37	7:53	7:08	6:38	8:35	7:49
Social Networking	2:03	1:32	1:52	2:29	2:23	1:42	1:55	1:40	1:36	2:05	2:07
Video on a Computer	na	na	na	na	na	na	na	na	na	na	na
App/Web on a Smartphone	20:01	22:35	21:09	17:50	17:04	21:55	21:33	20:58	21:14	20:18	19:44
Video Focused App/Web on a Smartphone	2:25	3:28	2:19	1:37	1:32	2:57	2:25	3:04	3:31	2:11	2:13
Streaming Audio	1:16	1:44	1:08	0:59	0:45	1:29	1:15	1:10	1:17	1:22	1:16
Social Networking	5:18	7:08	5:23	4:06	3:30	6:20	5:56	5:40	6:04	5:29	5:09
App/Web on a Tablet	10:44	10:32	9:18	11:02	12:16	9:52	9:49	11:30	9:45	10:37	10:43
Video Focused App/Web on a Tablet	3:12	4:00	3:20	2:56	2:30	3:38	3:37	3:47	3:18	3:08	3:06
Streaming Audio	0:41	1:05	0:41	0:28	0:23	0:54	0:53	1:08	0:30	0:41	0:37
Social Networking	2:06	2:29	1:49	1:59	2:10	2:08	2:00	2:26	2:06	2:04	2:03

Q3 2020 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+	WHITE 18+
Total Use of Television	216,356	54,906	53,658	57,490	50,302	108,564	107,032	27,410	35,067	12,829	158,740
Live+Time-Shifted TV	200,230	45,745	48,983	55,752	49,751	94,728	95,931	25,872	31,395	11,007	147,634
Time-Shifted TV	116,595	22,568	30,508	34,966	28,554	53,076	57,721	14,905	14,686	5,644	88,344
TV-Connected Devices	141,902	43,556	41,221	34,627	22,498	84,777	82,011	16,870	24,200	9,742	103,603
DVD/Blu-ray Device	20,569	3,408	5,212	6,502	5,446	8,620	9,541	1,872	2,544	887	16,427
Game Console	30,469	15,964	9,935	3,551	1,020	25,899	21,704	3,792	5,564	1,626	22,318
Internet Connected Device	123,308	36,947	36,696	30,589	19,075	73,643	72,450	14,725	21,471	9,078	89,310
Radio	219,868	62,158	54,685	57,603	45,422	116,843	111,462	27,726	37,875	na	153,037
Internet on a Computer	131,099	36,257	34,396	35,345	25,101	70,653	69,342	15,085	16,777	10,090	98,424
Social Networking	73,185	19,566	19,005	20,600	14,014	38,572	38,949	7,352	7,709	5,928	56,282
Video on a Computer	na	na	na	na	na	na	na	na	na	na	na
App/Web on a Smartphone	212,814	65,543	55,386	54,330	37,554	120,930	113,521	27,173	34,803	14,838	154,956
Video Focused App/Web on a Smartphone	180,649	60,304	49,133	42,976	28,236	109,437	101,344	24,563	31,568	12,608	129,297
Streaming Audio	140,819	52,053	38,084	31,150	19,533	90,136	80,552	18,906	24,647	9,911	100,817
Social Networking	202,391	64,111	53,501	50,325	34,453	117,612	109,861	25,961	33,508	14,076	147,102
App/Web on a Tablet	114,037	25,974	31,132	30,508	26,423	57,106	59,161	12,738	17,588	8,443	84,935
Video Focused App/Web on a Tablet	69,661	16,822	18,867	18,011	15,961	35,689	36,200	8,430	11,713	5,193	50,926
Streaming Audio	42,288	12,248	10,637	10,229	9,174	22,886	22,404	4,612	6,359	3,380	31,399
Social Networking	79,493	16,731	19,560	22,363	20,839	36,291	38,443	8,685	11,452	5,897	59,716

Q3 2020 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+	WHITE 18+
Total Use of Television	86%	74%	88%	92%	93%	80%	85%	86%	85%	76%	87%
Live+Time-Shifted TV	80%	62%	80%	89%	92%	70%	77%	81%	76%	65%	81%
Time-Shifted TV	46%	31%	50%	56%	53%	39%	46%	47%	35%	33%	49%
TV-Connected Devices	56%	59%	67%	55%	42%	63%	65%	53%	58%	58%	57%
DVD/Blu-ray Device	8%	5%	9%	10%	10%	6%	8%	6%	6%	5%	9%
Game Console	12%	22%	16%	6%	2%	19%	17%	12%	13%	10%	12%
Internet Connected Device	49%	50%	60%	49%	35%	55%	58%	46%	52%	54%	49%
Radio	88%	84%	90%	92%	85%	87%	89%	87%	92%	na	85%
Internet on a Computer	52%	49%	57%	56%	46%	53%	56%	48%	41%	59%	54%
Social Networking	29%	27%	31%	33%	26%	29%	31%	23%	19%	35%	31%
Video on a Computer	na	na	na	na	na	na	na	na	na	na	na
App/Web on a Smartphone	85%	89%	91%	87%	69%	90%	91%	86%	85%	87%	84%
Video Focused App/Web on a Smartphone	72%	82%	81%	68%	52%	82%	81%	78%	77%	74%	70%
Streaming Audio	56%	71%	63%	50%	36%	67%	65%	60%	60%	58%	55%
Social Networking	81%	87%	88%	80%	64%	88%	88%	82%	82%	83%	80%
App/Web on a Tablet	45%	35%	51%	49%	49%	43%	47%	40%	43%	50%	46%
Video Focused App/Web on a Tablet	28%	23%	31%	29%	30%	27%	29%	27%	29%	31%	28%
Streaming Audio	17%	17%	18%	16%	17%	17%	18%	15%	15%	20%	17%
Social Networking	32%	23%	32%	36%	39%	27%	31%	27%	28%	35%	33%

Q3 2020 TOTAL PERSONS, KIDS, AND TEENS

WEEKLY SUMMARY OF USAGE

PERSONS 2+	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	30:18	33:21	269,831	85%
Live+Time-Shifted TV	22:10	26:59	244,723	77%
Time-Shifted TV	2:39	5:47	137,434	43%
TV-Connected Devices	8:08	12:53	185,735	59%
DVD/Blu-ray Device	0:23	4:21	25,963	8%
Game Console	1:41	10:41	46,617	15%
Internet Connected Device	6:03	11:07	160,357	51%
Radio (P12+)	10:09	11:47	239,058	87%

KIDS 2-11	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	20:39	20:58	34,196	84%
Live+Time-Shifted TV	9:31	10:56	28,411	70%
Time-Shifted TV	0:59	2:22	13,916	34%
TV-Connected Devices	11:07	14:10	28,678	71%
DVD/Blu-ray Device	0:33	5:08	3,751	9%
Game Console	2:25	9:34	9,421	23%
Internet Connected Device	8:09	11:52	25,002	62%

TEENS 12-17	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	15:08	17:22	19,279	77%
Live+Time-Shifted TV	6:13	8:14	16,082	64%
Time-Shifted TV	0:39	2:02	6,923	28%
TV-Connected Devices	8:55	13:20	15,155	61%
DVD/Blu-ray Device	0:17	3:52	1,644	7%
Game Console	3:43	12:43	6,727	27%
Internet Connected Device	4:55	9:08	12,047	48%
Radio	5:28	7:09	19,190	77%

TELEVISION DISTRIBUTION STATUS

% OF TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	FEB 2020	FEB 2021	FEB 2020	FEB 2021	FEB 2020	FEB 2021	FEB 2020	FEB 2021	FEB 2020	FEB 2021
Traditional Cable	69.2%	66.9%	66.2%	64.1%	61.4%	57.7%	59.3%	55.4%	70.8%	68.6%
vMVPD	6.9%	8.6%	5.9%	7.9%	5.5%	6.8%	7.9%	8.4%	7.1%	8.9%
Over-the-Air	13.6%	13.7%	18.6%	18.0%	21.3%	23.0%	12.9%	15.0%	12.1%	12.3%
Broadband-Only	10.4%	10.8%	9.4%	10.0%	11.9%	12.5%	19.9%	21.2%	10.0%	10.2%
Total Multichannel	**76.1%**	**75.4%**	**72.0%**	**72.1%**	**66.9%**	**64.5%**	**67.2%**	**63.8%**	**77.9%**	**77.5%**

Note: Traditional Cable, vMVPD, Over the Air, and Broadband Only breaks are mutually exclusive. Total Multichannel is the sum of Traditional Cable and vMVPD.

10% of homes that subscribe to a vMVPD also subscribe to a traditional cable services, 24% are over-the-air, and 66% are broadband only households.

DEVICE AND SERVICE OWNERSHIP % IN TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	FEB 2020	FEB 2021	FEB 2020	FEB 2021	FEB 2020	FEB 2021	FEB 2020	FEB 2021	FEB 2020	FEB 2021
DVD/Blu-ray Player	58%	56%	48%	46%	46%	43%	44%	43%	61%	59%
DVR	52%	50%	49%	47%	46%	43%	43%	40%	54%	52%
Enabled Smart TV	52%	56%	50%	56%	60%	65%	63%	68%	51%	55%
Internet Connected Device	42%	48%	44%	49%	44%	48%	59%	61%	41%	47%
Game Console	41%	36%	41%	35%	52%	45%	46%	44%	39%	35%
Computer	78%	80%	67%	71%	72%	74%	89%	89%	80%	82%
Smartphone	93%	92%	95%	92%	97%	95%	97%	96%	93%	92%
Tablet	63%	63%	55%	54%	61%	61%	83%	73%	64%	64%
Internet Enabled TV-Connected Devices	74%	77%	73%	76%	81%	84%	88%	90%	73%	77%
Subscription Video On Demand	73%	74%	69%	69%	77%	78%	83%	85%	73%	74%

TOTAL UNIVERSE ESTIMATES

	TOTAL	BLACK	HISPANIC	ASIAN	WHITE
A18+ Total Universe (millions)	251	32	41	17	182
% of A18+ Total Universe		13%	16%	7%	73%

REFERENCE

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	YouTube and other sites with active public forums and comment 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, HBO MAX)	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. It is inclusive of Smart TV apps when used to represent device usage.

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.

Linear Platforms: Represent a combination of both traditional television and radio media platforms

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 TV: 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 subscribe to a vMVPD service.

Total Use of Television: The sum of Live+Time shifted TV, DVD/Blu-ray device, Game Console, and Internet Connected Device usage. Combining all these sources provides the total usage on the television screen.

Traditional Cable: Group of TV subscription services that include wired cable, satellite or telco providers.

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).

TV-connected devices include content being viewed on the TV screen through these devices. This includes when these devices are in use for any purpose, not just for accessing media content. For example, Game Console also includes when it is being used to play video games. Internet Connected Device usage includes Smart TV app usage.

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

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

RADIO METHODOLOGY

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

Estimates in this report are based on RADAR and the National Regional Database. RADAR reports national and network radio ratings using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents ages 12+ per year. The February 2020 report is based on the December 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. It leverages the most granular and comprehensive cross-platform respondent-level data from our panels, along with census data from Nielsen's Total Audience Measurement solutions, to provide the highest quality, representative sample of digital media consumption. Data for this was sourced from Nielsen Media Impact (Nielsen's cross platform planning solution).

Data used in this report is inclusive of multicultural audiences. 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.

In May 2020, smartphone measurement for Android platforms was updated to more precisely capture users' intended behavior versus app/web activity occurring in the background. These enhancements include improved APIs that allow for better collection of data and provide more robust information than what existed in previous versions. This has resulted in a decrease in smartphone duration and a trend break from data prior to Q2 2020.

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) 06/29/2020 – 09/27/2020 via Nielsen NPOWER/National Panel; Radio 09/12/2019 – 09/09/2020 via RADAR 147; 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 – 07/06/20, 07/13/20, 07/20/20, 08/03/20, 08/10/20, 08/17/20, 08/24/20, 09/07/20, 09/14/20, 09/21/20. Digital data was produced on 01/28/21 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 February 1, 2021 via Nielsen NPOWER/National Panel.

NIELSEN AD INTEL

Based on 01/01/19-12/31/19 and 01/01/20 - 12/31/20. Data was run on 03/05/21 and variations in data processed after this point reflect ongoing updates.

THE NIELSEN ADVERTISING ACROSS MEDIA CONSUMER SURVEY

The Nielsen Advertising Across Media Consumer Survey is a custom Nielsen study conducted in English only from February 2-17, 2021 via an online survey. It is based on a representative sample of 1,500 U.S. adults 18+ who consume media across TV, radio, or digital devices.

STREAMING METER

Nielsen Custom Streaming Meter Usage Report, based on a representative sample of 5,330 OTT capable households from the National TV Panel. Weighted, P2+, 01/01/21 - 01/31/21.

THE AUDIO UNIVERSE

Radio is based on Nielsen RADAR and the National Regional Database. Streaming audio on a smartphone and tablet are based on Nielsen Total Media Fusion. Satellite radio is based on Nielsen Scarborough USA+ (Release 2 2019 for Q3 2019 and Release 2 2020 for Q3 2020). Smart speaker and voice assistant reach are based on the Nielsen MediaTech Trender.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a leading global data and analytics company that provides a holistic and objective understanding of the media industry. With offerings spanning audience measurement, audience outcomes and content, Nielsen offers its clients and partners simple solutions to complex questions and optimizes the value of their investments and growth strategies. It is the only company that can offer de-duplicated cross-media audience measurement. Audience is Everything™ to Nielsen and its clients, and Nielsen is committed to ensuring that every voice counts.

An S&P 500 company, Nielsen offers measurement and analytics service in nearly 60 countries. Learn more at www.nielsen.com or www.nielsen.com/investors and connect with us on twitter.com/Nielsen, linkedin.com/company/nielsen, facebook.com/Nielsen and instagram.com/lifeatnielsen.

The Nielsen Total Audience Report is solely for Client's internal use, and may not be disclosed to any third party.