

# THE TOTAL AUDIENCE REPORT

Q1 2015

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.....

AN UNCOMMON SENSE  
OF THE CONSUMER™



# WELCOME

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Last quarter I said that “Measurement holds a key to enable true understanding of audience behavior.” As Nielsen continues to move toward total audience measurement it is vital to find a way to compare platforms by using common metrics that allow the industry to equate and analyze users and usage of these different platforms in a fair, standard and appropriate way. After all, consumers have a pretty simple choice they make routinely: finding the content — be it music, entertainment or information — that best fits their needs whenever and wherever they are. This simplicity does not hold true for measurement, especially when different media firms all use a different yard stick by which to gauge performance.

Earlier this year, Glenn Enoch joined Nielsen to lead our Audience Insights team. Glenn has long been a respected voice in measurement science and audience insights, having spent decades in this field. He has also long been a proponent of a “comparable metric” notion. As we talked about the content for the Total Audience Report, we agreed that an “apples-to-apples” look across devices and platforms was a critical next step toward totaling up audiences, no matter the device, delivery mechanism or platform.

In this Total Audience Report — which details media behavior over Q1 2015 — we were able to illustrate the importance of comparable metrics by highlighting some comparisons among TV, Radio and digital platforms. We are excited to showcase a true “apple-to-apples” comparison among different consumer options and ways to both view and listen. By doing so, we are giving the industry an impartial look not just at how many consumers are connecting with devices and platforms, but how often and for how long they are doing so!

  
DOUNIA



GLENN ENOCH  
SVP AUDIENCE INSIGHTS  
NIELSEN

As Nielsen works toward the rollout of Total Audience Measurement, we have been contemplating the critical importance of using comparable metrics when analyzing the users and usage of different platforms.

In the early days of digital device and content measurement, there was a notion that metrics used for traditional media didn't apply to emerging media — and that new metrics were required. This was challenged in a paper I co-authored for the *Journal of Advertising Research*\* where we pointed out that cross-platform research required metrics that worked across all media. There are three things we need to know: how many people used a given platform or piece of content, how often they did so and how long they spent doing this. Fortunately, these metrics already exist in measurement, although they may have different names. For example, we measure “How Many” in TV with Reach, in Radio with Cume and in digital media with Uniques.

The article went on to assert that these metrics are not interchangeable, that we can't compare how many people used one platform with how long they used a different platform.

Confusion of basic metrics remains a problem. A very common error is to compare digital video starts or views with TV average audience. It may seem that tens of millions of video views is a much bigger number than a few million persons in the audience of a TV program, but the TV number is expressing viewers in the average minute of the program. The total number of persons exposed to a given telecast is a much larger figure, and generally speaking the Reach of a program in a month or a quarter is far larger than the Uniques attracted to the same piece of content online.

The final section of every edition of the Total Audience Report is based on comparable metrics — we create tables showing reach and time spent for each platform, by month and by week, by various demo breaks and race/origin categories. This enables a fair comparison of one platform to the others.

In this edition, we're illustrating the importance of comparable metrics by highlighting comparisons of TV, Radio and digital platforms. We are using the best available data and have done all we can to make this an “apples-to-apples” comparison, but it is important to remember that these platforms are measured by different methods using different samples and different crediting rules. We have created a table to make clear what we have included and not included in each of our platform measures.

A handwritten signature in black ink that reads "Glenn Enoch". The signature is stylized and cursive.

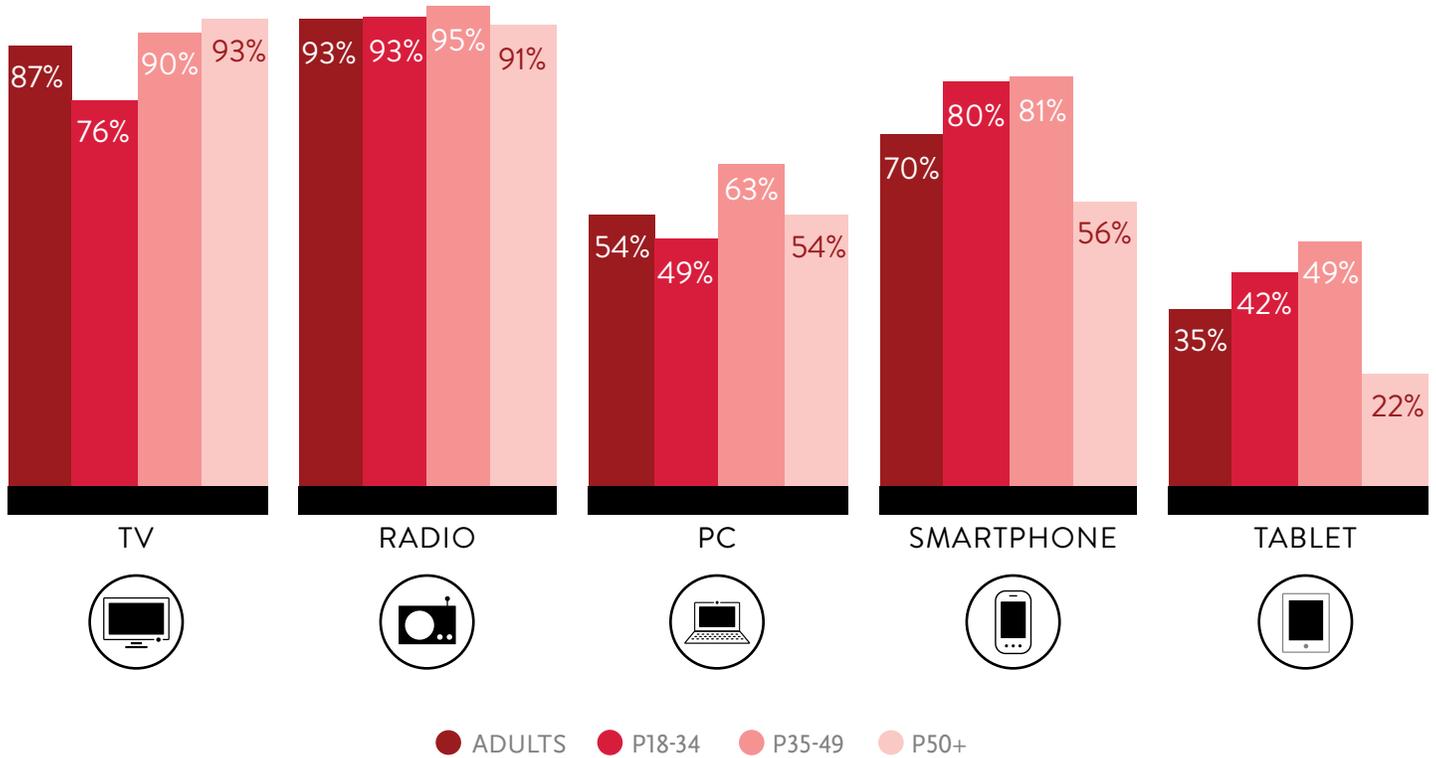
GLENN

\* “Cracking the Cross-Media Code: How to Use Single-Source Measures to Examine Media Cannibalization and Convergence,” Glenn Enoch and Kelly Johnson, *Journal of Advertising Research*, Vol. 50, No. 2, 2010, pp.125-136.

## HOW MANY

### OVER 90% OF ADULTS LISTEN TO RADIO EACH WEEK

WEEKLY REACH (% OF POPULATION)

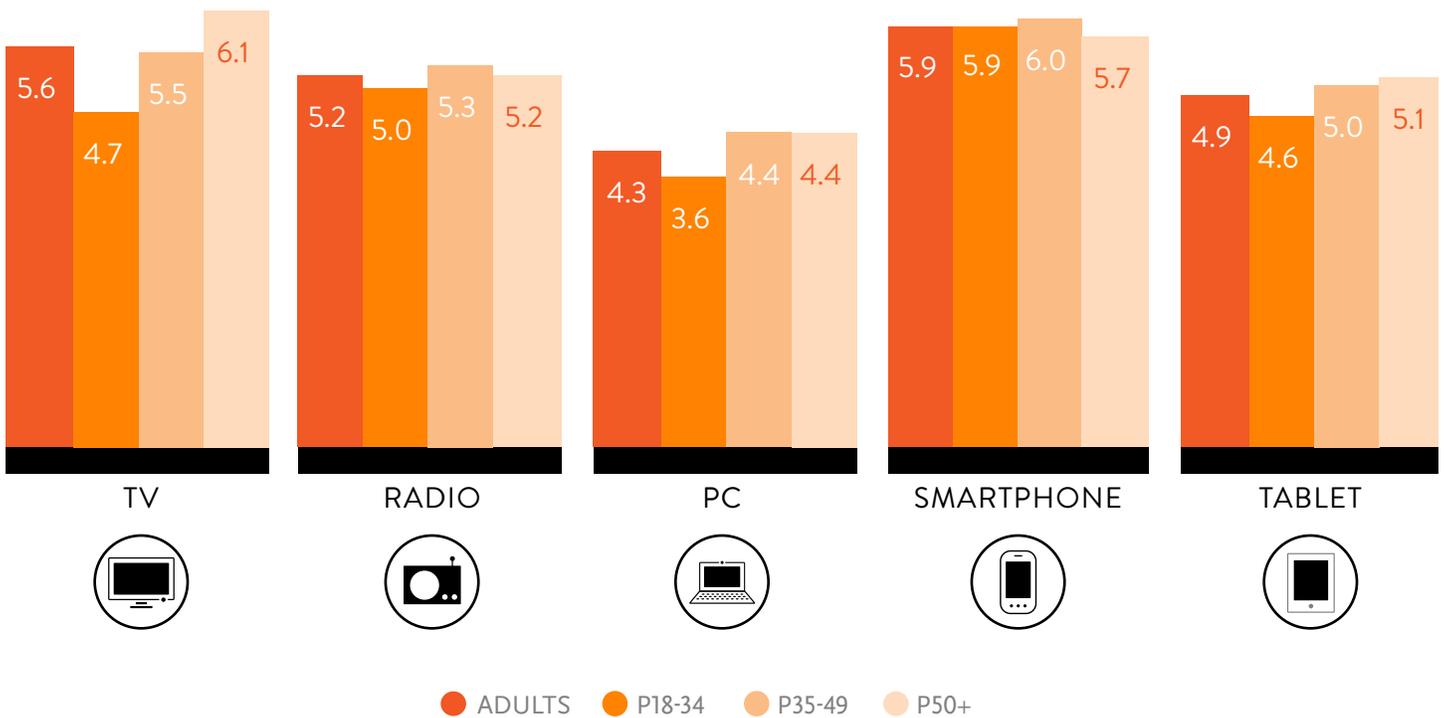


- **90%+ OF ADULTS OF ALL AGES LISTEN TO AM/FM RADIO IN A GIVEN WEEK.**
- WHILE MUCH ATTENTION ON DIGITAL MEDIA FOCUSES ON “MILLENNIALS,” MORE ADULTS AGED 35-49 USE PCS, SMARTPHONES AND TABLETS IN A WEEK THAN P18-34

## HOW OFTEN

### ADULTS USE SMARTPHONES NEARLY EVERY DAY

AVG DAYS PER WEEK WITH USAGE (AMONG USERS)



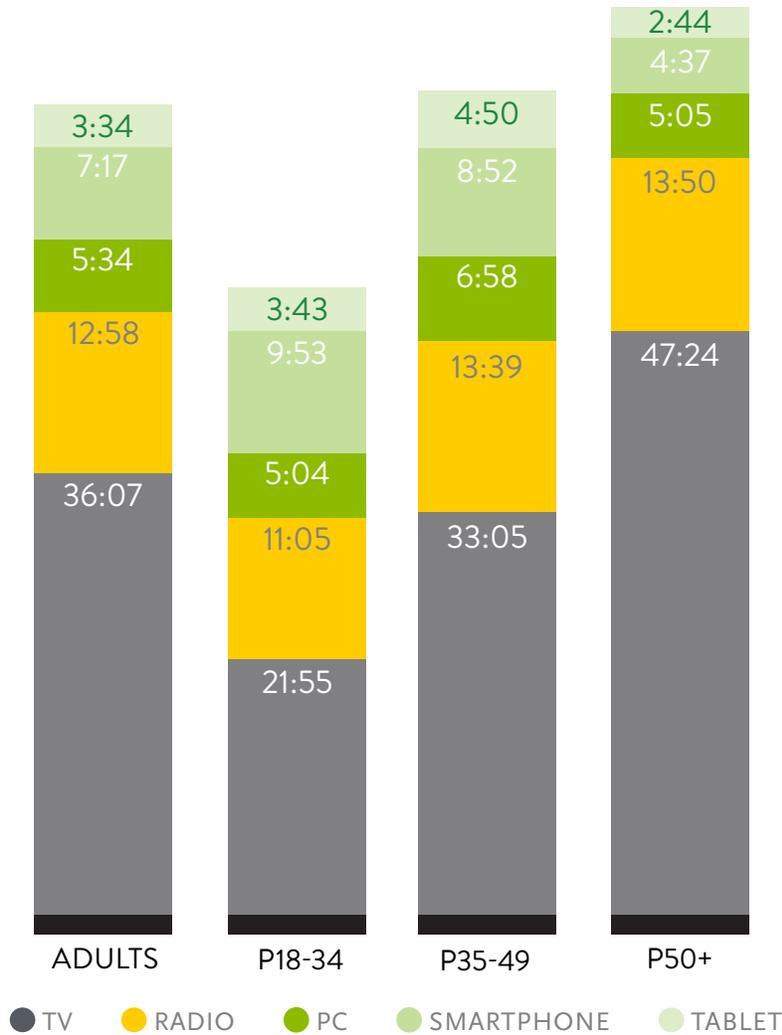
- **IF YOU HAVE A SMARTPHONE, YOU USE IT NEARLY EVERY DAY TO BROWSE THE WEB OR USE APPS.**
- **PCS HAVE LOWER WEEKLY DAYS OF USAGE THAN OTHER DIGITAL DEVICES**



## HOW LONG

### ADULTS SPEND THE MOST TIME WATCHING TV

WEEKLY HOURS:MINS OF USAGE (IN POPULATION)



- ADULTS OF ALL AGES SPEND MORE TIME WITH TV THAN WITH ANY OTHER PLATFORM
- P18-34 SPEND NEARLY AS MUCH TIME USING DIGITAL DEVICES AS A WHOLE AS THEY DO WATCHING TV.
- RADIO HAS THE MOST CONSISTENT MINUTES OF USAGE ACROSS ALL AGE GROUPS.

# COMPARABLE METRICS BY RACE AND ETHNICITY



## WEEKLY HOURS:MINS OF USAGE BY ETHNICITY & RACE

| ADULTS 18+                 | COMPOSITE | BLACK | HISPANIC | ASIAN AMERICAN |
|----------------------------|-----------|-------|----------|----------------|
| TV                         | 36:07     | 51:23 | 29:13    | 18:44          |
| Radio                      | 12:58     | 13:29 | 13:38    | n/a            |
| PC Total                   | 05:34     | 06:23 | 03:19    | 04:21          |
| PC Video                   | 01:30     | 02:17 | 01:13    | 01:17          |
| PC Streaming Audio         | 00:08     | 00:10 | 00:09    | 00:05          |
| PC Social Network          | 01:01     | 00:59 | 00:35    | 00:28          |
| Smartphone (App+Web)       | 07:17     | 08:14 | 09:54    | 07:39          |
| Smartphone Video           | 00:13     | 00:18 | 00:27    | 00:20          |
| Smartphone Streaming Audio | 00:17     | 00:24 | 00:36    | 00:20          |
| Smartphone Social Network  | 02:31     | 02:51 | 03:51    | 02:38          |
| Tablet (App+Web)           | 03:34     | 03:06 | 02:24    | 03:41          |
| Tablet Video               | 00:11     | 00:13 | 00:10    | 00:20          |
| Tablet Streaming Audio     | 00:04     | 00:02 | 00:01    | n/a            |
| Tablet Social Network      | 01:07     | 00:32 | 00:30    | 00:26          |

- BLACK AUDIENCES WATCH MORE TV THAN ANY OTHER GROUP
- HISPANICS ARE THE MOST AVID RADIO LISTENERS AND SPEND THE MOST TIME USING THEIR SMARTPHONES
- ASIAN AMERICANS REPORT THE LEAST AMOUNT OF TV VIEWING BUT THE HIGHEST AMOUNT OF TABLET USAGE FOR BOTH GENERAL USE AND VIDEO VIEWING.

## COMPARABLE METRICS - ADULTS 18+

AVERAGE WEEK JAN 26-MAR 1, 2015

| ADULTS 18+                    | HOW MANY                   |        | HOW OFTEN              |                         | HOW LONG         |                            |                           |       |                 |
|-------------------------------|----------------------------|--------|------------------------|-------------------------|------------------|----------------------------|---------------------------|-------|-----------------|
|                               | REACH/<br>CUME/<br>UNIQUES | REACH% | USAGE<br>DAYS/<br>WEEK | MINS/<br>DAY<br>(USERS) | GROSS<br>MINUTES | MINS/ADULT<br>(POPULATION) | MINS/<br>ADULT<br>(USERS) | AA%   | AVG<br>AUDIENCE |
| TV                            | 209,358,220                | 87.2%  | 5.56                   | 447                     | 520,613,338,259  | 2168                       | 2487                      | 21.5% | 51,648,149      |
| Radio                         | 222,921,000                | 92.8%  | 5.16                   | 162                     | 186,807,798,000  | 778                        | 838                       | 7.7%  | 18,532,520      |
| PC                            | 130,723,725                | 54.4%  | 4.26                   | 144                     | 80,213,020,140   | 334                        | 614                       | 3.3%  | 7,957,641       |
| PC Video                      | 86,382,003                 | 36.0%  | 2.87                   | 87                      | 21,625,492,857   | 90                         | 250                       | 0.9%  | 2,145,386       |
| PC Streaming<br>Audio         | 20,274,787                 | 8.4%   | 2.18                   | 42                      | 1,860,266,319    | 8                          | 92                        | 0.1%  | 184,550         |
| PC Social<br>Network          | 76,593,871                 | 31.9%  | 3.17                   | 60                      | 14,664,561,235   | 61                         | 191                       | 0.6%  | 1,454,818       |
| Smartphone<br>(App+Web)       | 167,478,381                | 69.7%  | 5.86                   | 107                     | 105,011,589,612  | 437                        | 627                       | 4.3%  | 10,417,816      |
| Smartphone<br>Video           | 88,572,389                 | 36.9%  | 2.68                   | 14                      | 3,349,113,558    | 14                         | 38                        | 0.1%  | 332,253         |
| Smartphone<br>Streaming Audio | 43,625,155                 | 18.2%  | 2.72                   | 34                      | 4,066,707,714    | 17                         | 93                        | 0.2%  | 403,443         |
| Smartphone<br>Social Network  | 146,592,649                | 61.0%  | 4.95                   | 50                      | 36,221,492,886   | 151                        | 247                       | 1.5%  | 3,593,402       |
| Tablet<br>(App+Web)           | 84,039,400                 | 35.0%  | 4.87                   | 126                     | 51,420,414,516   | 214                        | 612                       | 2.1%  | 5,101,232       |
| Tablet Video                  | 41,918,841                 | 17.5%  | 2.60                   | 25                      | 2,706,789,315    | 11                         | 65                        | 0.1%  | 268,531         |
| Tablet Streaming<br>Audio     | 8,489,524                  | 3.5%   | 2.07                   | 50                      | 873,927,743      | 4                          | 103                       | 0.0%  | 86,699          |
| Tablet Social<br>Network      | 71,333,245                 | 29.7%  | 4.25                   | 53                      | 16,157,054,703   | 67                         | 227                       | 0.7%  | 1,602,882       |

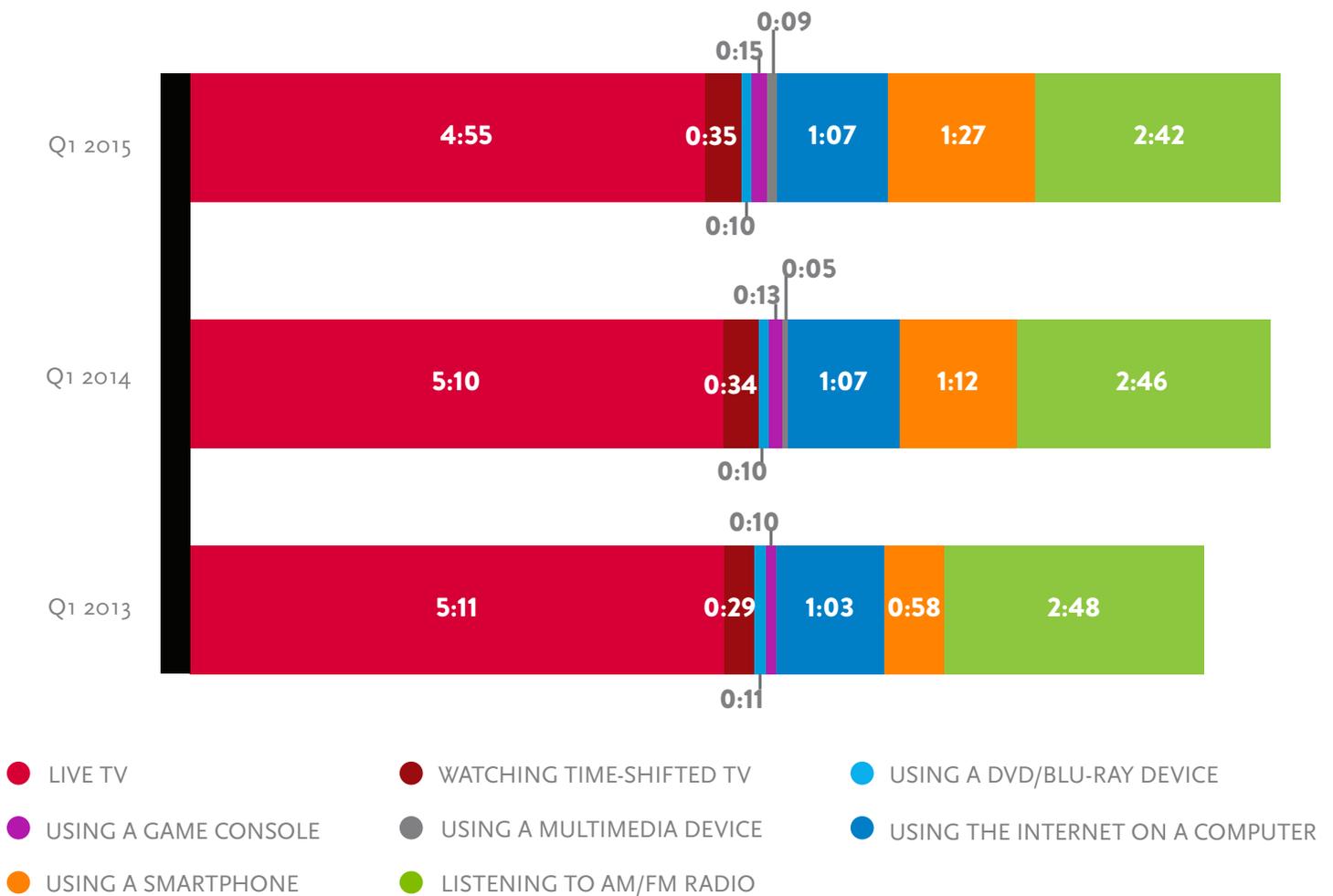
## DIGITAL AUDIENCE MEASUREMENT

|                            | INCLUDES   | DOES NOT INCLUDE  |
|----------------------------|--|---|
| PC                         | Home and work PC measurement of URLs and Internet Applications such as instant messengers, media players, and web phones                           | Non-browser requested URLs<br>Non-Internet Applications such as office apps, most games, and email apps   |
| PC Video                   | Both active (tagged) and passive (non-tagged) publisher measurement  | Untagged content among active publishers, content that has been tagged for less than one full month   |
| PC Streaming Audio         | Sites and Internet Applications specifically designed to provide audio content when they are in the foreground (Ex. Pandora, Spotify, iHeartRadio) | Audio content through YouTube, VEVO, and other sites that also provide video capabilities. Duration is not credited if the page is in the background or the user is inactive for over 60 seconds. |
| PC Social Network          | All sites in the Member Communities subcategory as defined in the Nielsen NetView dictionary   | Reddit, YouTube, and other sites with active public forums and comment sections   |
| Smartphone (App+Web)       | Android: all app/web activity, measured passively<br>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)<br>Email activity through the standard Mail app for iOS<br>Standard text messaging is not included for iOS or Android                |
| Smartphone Video           | Apps and sites specifically designed to view video content (Ex. Netflix, YouTube, HBOGO)   | Video content available through apps/web where video is not the primary focus (Ex. CNN, Weather Channel, Facebook)  |
| Smartphone Streaming Audio | Apps and sites specifically designed to provide audio content (Ex. Pandora, Spotify, iHeartRadio)  | Audio content through YouTube, VEVO, and other apps that also provide video capabilities  |
| Smartphone Social Network  | All apps/sites in the Social Networking subcategory as defined in the Nielsen EMM dictionary   | Reddit, YouTube, and other sites with active public forums and comment sections   |
| Tablet (App+Web)           | 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<br>Email activity through the standard Mail app for iOS<br>Standard text messaging is not included  |
| Tablet Video               | Apps and sites specifically designed to view video content (Ex. Netflix, YouTube, HBOGO)   | Video content available through apps/web where video is not the primary focus (Ex. CNN, Weather Channel, Facebook)  |
| Tablet Streaming Audio     | Apps and sites specifically designed to provide audio content (Ex. Pandora, Spotify, iHeartRadio)  | Audio content through YouTube, VEVO, and other apps that also provide video capabilities  |
| Tablet Social Network      | All apps/sites in the Social Networking subcategory as defined in the Nielsen EMM dictionary   | Reddit, YouTube, and other sites with active public forums and comment sections   |

# A CLOSER LOOK AT THE DATA

## EXHIBIT 1 - AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON USERS OF EACH MEDIUM



**TABLE 1 – A WEEK IN THE LIFE**

WEEKLY TIME SPENT IN HOURS:MINUTES BY AGE FOR US POPULATION

|                                    | K<br>2-11 | T<br>12-17 | A<br>18-24 | A<br>25-34 | A<br>35-49 | A<br>50-64 | A<br>65+ | P<br>2+ | A<br>18+ | BLACK<br>2+ | HISP.<br>2+ | ASIAN<br>AM.<br>2+ |
|------------------------------------|-----------|------------|------------|------------|------------|------------|----------|---------|----------|-------------|-------------|--------------------|
| On Traditional TV                  | 22:13     | 17:52      | 18:04      | 24:36      | 32:54      | 43:49      | 51:14    | 32:33   | 35:50    | 45:44       | 26:41       | 17:39              |
| Watching Time-shifted TV           | 2:28      | 1:50       | 1:43       | 3:24       | 4:26       | 4:31       | 3:54     | 3:29    | 3:50     | 3:12        | 2:20        | 2:08               |
| Using a DVD/ Blu-Ray Device        | 2:00      | 1:04       | 0:58       | 1:18       | 1:14       | 1:07       | 0:42     | 1:12    | 1:05     | 1:11        | 1:10        | 0:57               |
| Using a Game Console               | 2:55      | 4:22       | 4:34       | 3:07       | 1:16       | 0:27       | 0:07     | 1:59    | 1:35     | 2:11        | 2:12        | 1:23               |
| Using a Multimedia Device          | 1:08      | 0:43       | 1:21       | 1:41       | 1:11       | 0:40       | 0:27     | 1:01    | 1:01     | 0:46        | 0:45        | 2:04               |
| Using the Internet on a Computer   | 0:17      | 0:46       | 4:26       | 5:36       | 7:06       | 6:19       | 3:23     | 4:30    | 5:36     | 4:56        | 2:52        | 3:27               |
| Watching Video on Internet         | 0:21      | 0:24       | 1:51       | 1:58       | 1:56       | 1:22       | 0:38     | 1:17    | 1:32     | 1:50        | 0:57        | 1:02               |
| Using any App/Web on a Smartphone* | n/a       | n/a        | 10:27      | 9:34       | 9:01       | 6:23       | 1:35     | n/a     | 7:16     | 9:47        | 9:54        | 8:49               |
| Watching Video on a Smartphone*    | n/a       | n/a        | 0:32       | 0:21       | 0:14       | 0:08       | n/a      | n/a     | 0:14     | 0:22        | 0:27        | 0:23               |
| Listening to AM/ FM Radio*         | n/a       | 7:06       | 10:11      | 11:24      | 13:30      | 14:51      | 12:02    | 12:14   | 12:46    | 12:40       | 12:21       | n/a                |

\*Radio data are based on P12+, and mobile data are based on 18+ in all tables where listed as P2+

**TABLE 2 – OVERALL USAGE BY MEDIUM**  
NUMBER OF USERS 2+ (IN 000'S) – MONTHLY REACH

|                                    | COMPOSITE |         | BLACK  |        | HISPANIC |        | ASIAN AMERICAN |        |
|------------------------------------|-----------|---------|--------|--------|----------|--------|----------------|--------|
|                                    | Q1 15     | Q1 14   | Q1 15  | Q1 14  | Q1 15    | Q1 14  | Q1 15          | Q1 14  |
| On Traditional TV                  | 284,817   | 285,394 | 37,712 | 37,342 | 48,695   | 48,364 | 15,310         | 15,281 |
| Watching Time-shifted TV           | 182,725   | 177,690 | 23,765 | 22,000 | 26,042   | 24,940 | 8,409          | 8,507  |
| Using a DVD/Blu-Ray Device         | 140,826   | 145,949 | 16,262 | 16,413 | 22,563   | 23,959 | 6,760          | 7,172  |
| Using a Game Console               | 98,664    | 102,142 | 12,352 | 12,949 | 17,947   | 19,619 | 5,763          | 5,834  |
| Using a Multimedia Device          | 53,236    | 33,406  | 5,231  | 2,649  | 8,059    | 4,882  | 5,912          | 4,018  |
| Using the Internet on a Computer   | 192,875   | 199,835 | 24,748 | 24,586 | 25,024   | 26,861 | 6,829          | 7,437  |
| Watching Video on Internet         | 138,502   | 151,504 | 17,851 | 18,489 | 16,822   | 19,998 | 5,107          | 5,921  |
| Using any App/Web on a Smartphone* | 170,303   | 148,983 | 20,717 | 19,290 | 29,492   | 27,740 | 10,192         | 8,823  |
| Watching Video on a Smartphone*    | 128,432   | 103,459 | 17,255 | 15,804 | 24,688   | 21,696 | 7,824          | 6,497  |
| Listening to AM/FM Radio*          | 260,099   | 259,465 | 33,238 | 33,101 | 42,828   | 42,626 | n/a            | n/a    |

**TABLE 3 – MONTHLY TIME SPENT BY MEDIUM**  
USERS 2+ IN HOURS: MINUTES

|                                    | COMPOSITE |        | BLACK  |        | HISPANIC |        | ASIAN AMERICAN |       |
|------------------------------------|-----------|--------|--------|--------|----------|--------|----------------|-------|
|                                    | Q1 15     | Q1 14  | Q1 15  | Q1 14  | Q1 15    | Q1 14  | Q1 15          | Q1 14 |
| On Traditional TV                  | 151:33    | 159:07 | 210:42 | 222:41 | 120:58   | 125:45 | 89:05          | 92:55 |
| Watching Time-shifted TV           | 16:13     | 15:32  | 14:44  | 12:40  | 10:37    | 9:58   | 10:46          | 10:51 |
| Using a DVD/Blu-Ray Device         | 5:36      | 5:45   | 5:27   | 6:05   | 5:16     | 5:34   | 4:49           | 4:08  |
| Using a Game Console               | 9:15      | 8:42   | 10:04  | 9:52   | 9:58     | 9:09   | 7:01           | 5:33  |
| Using a Multimedia Device          | 4:42      | 2:28   | 3:30   | 1:30   | 3:23     | 1:57   | 10:27          | 6:44  |
| Using the Internet on a Computer   | 30:36     | 30:11  | 34:17  | 32:36  | 25:08    | 25:35  | 38:50          | 38:57 |
| Watching Video on Internet         | 12:13     | 10:49  | 17:39  | 13:38  | 12:25    | 12:16  | 15:40          | 18:13 |
| Using any App/Web on a Smartphone* | 44:32     | 36:54  | 51:35  | 46:59  | 52:36    | 44:33  | 45:47          | 38:47 |
| Watching Video on a Smartphone*    | 1:53      | 1:37   | 2:20   | 2:21   | 2:52     | 2:21   | 2:39           | 1:55  |
| Listening to AM/FM Radio*          | 58:10     | 59:54  | 60:16  | 62:08  | 57:22    | 59:37  | n/a            | n/a   |

\*Radio data based on P12+ and mobile data based on P18+

**TABLE 4A – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES  
AMONG COMPOSITE**

|                                    | K<br>2-11 | T<br>12-17 | A<br>18-24 | A<br>25-34 | A<br>35-49 | A<br>50-64 | A<br>65+ | P<br>2+ |
|------------------------------------|-----------|------------|------------|------------|------------|------------|----------|---------|
| On Traditional TV                  | 103:43    | 82:26      | 93:19      | 119:30     | 150:15     | 197:20     | 231:20   | 151:33  |
| Watching Time-shifted TV           | 11:32     | 8:27       | 8:52       | 16:31      | 20:15      | 20:20      | 17:37    | 16:13   |
| Using a DVD/Blu-Ray Device         | 9:22      | 4:53       | 5:00       | 6:18       | 5:37       | 5:02       | 3:10     | 5:36    |
| Using a Game Console               | 13:38     | 20:10      | 23:34      | 15:07      | 5:47       | 2:00       | 0:33     | 9:15    |
| Using a Multimedia Device          | 5:18      | 3:17       | 6:58       | 8:13       | 5:24       | 3:01       | 2:02     | 4:42    |
| Using the Internet on a Computer   | 3:59      | 7:29       | 31:28      | 33:39      | 37:20      | 35:58      | 26:31    | 30:36   |
| Watching Video on Internet         | 7:51      | 6:39       | 19:01      | 16:39      | 13:55      | 10:12      | 6:41     | 12:13   |
| Using any App/Web on a Smartphone* | n/a       | n/a        | 53:24      | 51:57      | 47:00      | 36:28      | 27:05    | 44:32   |
| Watching Video on a Smartphone*    | n/a       | n/a        | 3:13       | 2:21       | 1:34       | 1:12       | 0:49     | 1:53    |
| Listening to AM/FM Radio*          | n/a       | 34:51      | 49:17      | 53:20      | 62:12      | 68:42      | 60:55    | 58:10   |

**TABLE 4B – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES  
AMONG BLACKS**

|                                    | K<br>2-11 | T<br>12-17 | A<br>18-24 | A<br>25-34 | A<br>35-49 | A<br>50-64 | A<br>65+ | P<br>2+ |
|------------------------------------|-----------|------------|------------|------------|------------|------------|----------|---------|
| On Traditional TV                  | 145:05    | 139:22     | 144:16     | 180:01     | 219:45     | 284:13     | 332:57   | 210:42  |
| Watching Time-shifted TV           | 10:27     | 9:26       | 9:47       | 16:01      | 21:20      | 15:42      | 14:36    | 14:44   |
| Using a DVD/Blu-Ray Device         | 8:02      | 3:41       | 4:35       | 5:37       | 5:15       | 6:21       | 2:46     | 5:27    |
| Using a Game Console               | 12:49     | 21:42      | 19:32      | 15:51      | 5:44       | 1:49       | 0:56     | 10:04   |
| Using a Multimedia Device          | 3:59      | 2:47       | 4:07       | 5:56       | 3:49       | 2:11       | 1:25     | 3:30    |
| Using the Internet on a Computer   | 4:25      | 6:31       | 42:03      | 35:33      | 43:51      | 37:00      | 24:13    | 34:17   |
| Watching Video on Internet         | 8:29      | 4:14       | 27:10      | 19:52      | 22:28      | 13:50      | 5:40     | 17:39   |
| Using any App/Web on a Smartphone* | n/a       | n/a        | 47:31      | 68:26      | 58:20      | 43:31      | -        | 51:35   |
| Watching Video on a Smartphone*    | n/a       | n/a        | 3:19       | 3:37       | 2:18       | 1:21       | -        | 2:20    |
| Listening to AM/FM Radio*          | n/a       | 38:50      | 49:17      | 55:04      | 64:48      | 74:07      | 65:58    | 60:16   |

\*Radio data are based on P12+, and mobile data are based on 18+ in all tables where listed as P2+

**TABLE 4C – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES  
AMONG HISPANICS**

|                                    | K<br>2-11 | T<br>12-17 | A<br>18-24 | A<br>25-34 | A<br>35-49 | A<br>50-64 | A<br>65+ | P<br>2+ |
|------------------------------------|-----------|------------|------------|------------|------------|------------|----------|---------|
| On Traditional TV                  | 101:50    | 76:39      | 83:12      | 106:45     | 127:12     | 168:58     | 230:13   | 120:58  |
| Watching Time-shifted TV           | 9:14      | 7:02       | 7:58       | 11:14      | 11:28      | 13:35      | 14:32    | 10:37   |
| Using a DVD/Blu-Ray Device         | 8:05      | 4:34       | 4:45       | 5:40       | 4:40       | 3:48       | 3:11     | 5:16    |
| Using a Game Console               | 11:55     | 18:47      | 22:11      | 11:23      | 4:03       | 1:31       | 0:59     | 9:58    |
| Using a Multimedia Device          | 3:27      | 2:50       | 3:50       | 5:28       | 2:59       | 2:19       | 1:13     | 3:23    |
| Using the Internet on a Computer   | 3:57      | 7:22       | 29:15      | 31:25      | 30:06      | 31:21      | 22:39    | 25:08   |
| Watching Video on Internet         | 8:40      | 8:06       | 15:54      | 15:08      | 13:32      | 10:26      | 6:29     | 12:25   |
| Using any App/Web on a Smartphone* | n/a       | n/a        | 62:52      | 54:34      | 52:05      | 40:20      | -        | 52:36   |
| Watching Video on a Smartphone*    | n/a       | n/a        | 4:38       | 2:39       | 2:03       | 1:45       | -        | 2:52    |
| Listening to AM/FM Radio*          | n/a       | 34:43      | 50:01      | 56:39      | 65:14      | 67:07      | 65:10    | 57:22   |

**TABLE 4D – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES  
AMONG ASIAN AMERICANS**

|                                    | K<br>2-11 | T<br>12-17 | A<br>18-24 | A<br>25-34 | A<br>35-49 | A<br>50-64 | A<br>65+ | P<br>2+ |
|------------------------------------|-----------|------------|------------|------------|------------|------------|----------|---------|
| On Traditional TV                  | 67:56     | 51:02      | 49:11      | 70:12      | 80:27      | 115:57     | 168:16   | 89:05   |
| Watching Time-shifted TV           | 7:24      | 6:49       | 7:11       | 11:29      | 13:11      | 13:37      | 9:21     | 10:46   |
| Using a DVD/Blu-Ray Device         | 6:15      | 2:44       | 4:18       | 3:49       | 4:31       | 3:54       | 8:23     | 4:49    |
| Using a Game Console               | 10:10     | 10:46      | 14:46      | 11:06      | 5:04       | 2:55       | 0:19     | 7:01    |
| Using a Multimedia Device          | 9:18      | 5:29       | 13:33      | 13:52      | 11:50      | 8:30       | 8:36     | 10:27   |
| Using the Internet on a Computer   | 5:57      | 16:13      | 51:04      | 45:26      | 49:42      | 23:37      | 24:17    | 38:50   |
| Watching Video on Internet         | 11:04     | 6:40       | 21:14      | 24:00      | 13:16      | 9:59       | 10:06    | 15:40   |
| Using any App/Web on a Smartphone* | n/a       | n/a        | 53:10      | 46:07      | 43:27      | -          | -        | 45:47   |
| Watching Video on a Smartphone*    | n/a       | n/a        | 2:41       | 2:40       | 1:52       | -          | -        | 2:39    |

\*Radio data are based on P12+, and mobile data are based on 18+ in all tables where listed as P2+

TABLE 5A – CROSS PLATFORM HOMES RANKED BY IN-HOME STREAMING BEHAVIOR

| STREAMING QUINTILE | COMPOSITE          |                                |                                  |                            | BLACK              |                                |                                  |                            |
|--------------------|--------------------|--------------------------------|----------------------------------|----------------------------|--------------------|--------------------------------|----------------------------------|----------------------------|
|                    | # OF PERSONS (000) | STREAM (AVERAGE DAILY MINUTES) | INTERNET (AVERAGE DAILY MINUTES) | TV (AVERAGE DAILY MINUTES) | # OF PERSONS (000) | STREAM (AVERAGE DAILY MINUTES) | INTERNET (AVERAGE DAILY MINUTES) | TV (AVERAGE DAILY MINUTES) |
| Stream 1           | 21,948             | 24.6                           | 64.9                             | 259.3                      | 2,122              | 19.0                           | 61.5                             | 394.0                      |
| Stream 2           | 21,978             | 2.6                            | 30.9                             | 271.8                      | 2,145              | 2.0                            | 22.8                             | 363.9                      |
| Stream 3           | 21,946             | 0.7                            | 17.7                             | 275.3                      | 2,130              | 0.6                            | 14.3                             | 400.9                      |
| Stream 4           | 21,968             | 0.2                            | 13.1                             | 279.7                      | 2,140              | 0.1                            | 10.9                             | 376.5                      |
| Stream 5           | 21,959             | 0.0                            | 7.2                              | 250.0                      | 2,131              | 0.0                            | 5.8                              | 344.8                      |
| Non Streamers      | 127,108            | 0.0                            | 0.9                              | 239.0                      | 14,291             | 0.0                            | 0.9                              | 337.6                      |
| All                | 236,906            | 2.6                            | 13.0                             | 252.2                      | 24,960             | 1.9                            | 10.5                             | 354.2                      |

| STREAMING QUINTILE | HISPANIC           |                                |                                  |                            | ASIAN AMERICAN     |                                |                                  |                            |
|--------------------|--------------------|--------------------------------|----------------------------------|----------------------------|--------------------|--------------------------------|----------------------------------|----------------------------|
|                    | # OF PERSONS (000) | STREAM (AVERAGE DAILY MINUTES) | INTERNET (AVERAGE DAILY MINUTES) | TV (AVERAGE DAILY MINUTES) | # OF PERSONS (000) | STREAM (AVERAGE DAILY MINUTES) | INTERNET (AVERAGE DAILY MINUTES) | TV (AVERAGE DAILY MINUTES) |
| Stream 1           | 2,662              | 21.7                           | 42.9                             | 171.6                      | 1,214              | 24.6                           | 55.0                             | 117.6                      |
| Stream 2           | 2,654              | 2.6                            | 17.6                             | 224.4                      | 1,222              | 3.6                            | 23.0                             | 120.2                      |
| Stream 3           | 2,657              | 0.7                            | 11.7                             | 224.7                      | 1,204              | 0.7                            | 14.5                             | 141.6                      |
| Stream 4           | 2,656              | 0.2                            | 7.9                              | 214.8                      | 1,226              | 0.2                            | 24.4                             | 150.8                      |
| Stream 5           | 2,660              | 0.0                            | 6.4                              | 214.4                      | 1,215              | 0.0                            | 7.6                              | 135.3                      |
| Non Streamers      | 20,529             | 0.0                            | 0.6                              | 207.0                      | 9,848              | 0.0                            | 0.6                              | 146.9                      |
| All                | 33,818             | 2.0                            | 7.2                              | 208.1                      | 15,930             | 2.2                            | 10.0                             | 141.6                      |

TABLE 5B – CROSS PLATFORM HOMES RANKED BY IN-HOME INTERNET BEHAVIOR

| INTERNET QUINTILE  | COMPOSITE          |                                  |                                    |                              | BLACK              |                                  |                                    |                              |
|--------------------|--------------------|----------------------------------|------------------------------------|------------------------------|--------------------|----------------------------------|------------------------------------|------------------------------|
|                    | # OF PERSONS (000) | STREAM ( AVERAGE DAILY MINUTES ) | INTERNET ( AVERAGE DAILY MINUTES ) | TV ( AVERAGE DAILY MINUTES ) | # OF PERSONS (000) | STREAM ( AVERAGE DAILY MINUTES ) | INTERNET ( AVERAGE DAILY MINUTES ) | TV ( AVERAGE DAILY MINUTES ) |
| Internet 1         | 31,312             | 13.6                             | 74.0                               | 321.5                        | 3,084              | 11.2                             | 64.1                               | 424.9                        |
| Internet 2         | 31,304             | 4.1                              | 16.1                               | 269.6                        | 3,084              | 2.8                              | 13.5                               | 385.5                        |
| Internet 3         | 31,310             | 1.4                              | 5.2                                | 246.0                        | 3,080              | 0.6                              | 4.3                                | 361.2                        |
| Internet 4         | 31,313             | 0.5                              | 1.4                                | 241.0                        | 3,073              | 0.3                              | 1.2                                | 347.7                        |
| Internet 5         | 31,313             | 0.1                              | 0.2                                | 233.9                        | 3,098              | 0.1                              | 0.2                                | 337.0                        |
| Non Internet Users | 80,353             | 0.0                              | 0.0                                | 231.5                        | 9,541              | 0.0                              | 0.0                                | 325.9                        |
| All                | 236,906            | 2.6                              | 13.0                               | 252.2                        | 24,960             | 1.9                              | 10.5                               | 354.2                        |

| INTERNET QUINTILE  | HISPANIC           |                                  |                                    |                              | ASIAN AMERICAN     |                                  |                                    |                              |
|--------------------|--------------------|----------------------------------|------------------------------------|------------------------------|--------------------|----------------------------------|------------------------------------|------------------------------|
|                    | # OF PERSONS (000) | STREAM ( AVERAGE DAILY MINUTES ) | INTERNET ( AVERAGE DAILY MINUTES ) | TV ( AVERAGE DAILY MINUTES ) | # OF PERSONS (000) | STREAM ( AVERAGE DAILY MINUTES ) | INTERNET ( AVERAGE DAILY MINUTES ) | TV ( AVERAGE DAILY MINUTES ) |
| Internet 1         | 3,942              | 11.5                             | 46.9                               | 234.3                        | 1,810              | 13.6                             | 68.5                               | 111.7                        |
| Internet 2         | 3,955              | 3.7                              | 9.8                                | 200.2                        | 1,804              | 4.0                              | 13.2                               | 157.8                        |
| Internet 3         | 3,942              | 1.1                              | 3.1                                | 209.1                        | 1,808              | 1.2                              | 3.6                                | 137.9                        |
| Internet 4         | 3,957              | 0.5                              | 0.8                                | 204.1                        | 1,809              | 0.4                              | 1.0                                | 149.4                        |
| Internet 5         | 3,947              | 0.2                              | 0.1                                | 195.2                        | 1,808              | 0.2                              | 0.2                                | 114.3                        |
| Non Internet Users | 14,076             | 0.0                              | 0.0                                | 207.4                        | 6,891              | 0.0                              | 0.0                                | 151.5                        |
| All                | 33,818             | 2.0                              | 7.2                                | 208.1                        | 15,930             | 2.2                              | 10.0                               | 141.6                        |

TABLE 5C – CROSS PLATFORM HOMES RANKED BY IN-HOME TELEVISION VIEWING BEHAVIOR

| TELEVISION QUINTILE    | COMPOSITE          |                                  |                                    |                              | BLACK              |                                  |                                    |                              |
|------------------------|--------------------|----------------------------------|------------------------------------|------------------------------|--------------------|----------------------------------|------------------------------------|------------------------------|
|                        | # OF PERSONS (000) | STREAM ( AVERAGE DAILY MINUTES ) | INTERNET ( AVERAGE DAILY MINUTES ) | TV ( AVERAGE DAILY MINUTES ) | # OF PERSONS (000) | STREAM ( AVERAGE DAILY MINUTES ) | INTERNET ( AVERAGE DAILY MINUTES ) | TV ( AVERAGE DAILY MINUTES ) |
| Television 1           | 46,557             | 2.9                              | 21.0                               | 648.8                        | 4,923              | 2.3                              | 17.1                               | 838.1                        |
| Television 2           | 46,572             | 1.6                              | 12.7                               | 325.2                        | 4,916              | 1.7                              | 11.1                               | 463.7                        |
| Television 3           | 46,576             | 2.0                              | 11.0                               | 190.8                        | 4,930              | 1.6                              | 10.5                               | 282.0                        |
| Television 4           | 46,565             | 2.0                              | 9.2                                | 92.8                         | 4,925              | 1.9                              | 6.9                                | 158.3                        |
| Television 5           | 46,564             | 3.8                              | 10.7                               | 18.5                         | 4,929              | 1.9                              | 7.1                                | 45.7                         |
| Non Television Viewers | 4,072              | 12.9                             | 16.8                               | 0.0                          | 337                | 2.1                              | 3.4                                | 0.0                          |
| All                    | 236,906            | 2.6                              | 13.0                               | 252.2                        | 24,960             | 1.9                              | 10.5                               | 354.2                        |

| TELEVISION QUINTILE    | HISPANIC           |                                  |                                    |                              | ASIAN AMERICAN     |                                  |                                    |                              |
|------------------------|--------------------|----------------------------------|------------------------------------|------------------------------|--------------------|----------------------------------|------------------------------------|------------------------------|
|                        | # OF PERSONS (000) | STREAM ( AVERAGE DAILY MINUTES ) | INTERNET ( AVERAGE DAILY MINUTES ) | TV ( AVERAGE DAILY MINUTES ) | # OF PERSONS (000) | STREAM ( AVERAGE DAILY MINUTES ) | INTERNET ( AVERAGE DAILY MINUTES ) | TV ( AVERAGE DAILY MINUTES ) |
| Television 1           | 6,699              | 1.4                              | 9.6                                | 508.9                        | 3,064              | 1.6                              | 8.5                                | 431.4                        |
| Television 2           | 6,697              | 1.5                              | 6.4                                | 265.4                        | 3,060              | 1.9                              | 8.5                                | 176.8                        |
| Television 3           | 6,691              | 1.4                              | 5.0                                | 161.6                        | 3,061              | 1.7                              | 7.7                                | 91.9                         |
| Television 4           | 6,687              | 1.7                              | 6.3                                | 87.1                         | 3,070              | 3.2                              | 13.6                               | 30.0                         |
| Television 5           | 6,706              | 3.8                              | 8.5                                | 21.4                         | 3,051              | 2.9                              | 12.7                               | 4.2                          |
| Non Television Viewers | 339                | 5.1                              | 8.4                                | 0.0                          | 624                | 2.2                              | 5.4                                | 0.0                          |
| All                    | 33,818             | 2.0                              | 7.2                                | 208.1                        | 15,930             | 2.2                              | 10.0                               | 141.6                        |

**TABLE 6 – SMARTPHONE VIDEO VIEWING QUINTILES**  
 BASED ON ADULTS 18+ USAGE OF VIDEO ON APPS/WEB

| SMARTPHONE QUINTILES | Q1 2015            |                | Q1 2014            |                |
|----------------------|--------------------|----------------|--------------------|----------------|
|                      | # OF PERSONS (000) | TPP (HH:MM:SS) | # OF PERSONS (000) | TPP (HH:MM:SS) |
| Smartphone 1         | 25,679             | 07:37:46       | 20,671             | 06:36:24       |
| Smartphone 2         | 25,667             | 01:17:03       | 20,699             | 01:03:22       |
| Smartphone 3         | 25,697             | 00:25:11       | 20,688             | 00:21:34       |
| Smartphone 4         | 25,677             | 00:07:30       | 20,697             | 00:06:35       |
| Smartphone 5         | 25,712             | 00:00:57       | 20,704             | 00:00:58       |
| All                  | 128,432            | 01:53:39       | 103,459            | 01:37:42       |

**TABLE 7 - TELEVISION DISTRIBUTION SOURCES**  
 NUMBER OF HOUSEHOLDS (IN 000'S)

| MARKET BREAK           | COMPOSITE |         | BLACK   |         | HISPANIC |         | ASIAN AMERICAN |         |
|------------------------|-----------|---------|---------|---------|----------|---------|----------------|---------|
|                        | Q1 2015   | Q1 2014 | Q1 2015 | Q1 2014 | Q1 2015  | Q1 2014 | Q1 2015        | Q1 2014 |
| Broadcast Only         | 12,513    | 11,617  | 2,199   | 2,038   | 2,712    | 2,825   | 724            | 690     |
| Wired Cable (No Telco) | 52,730    | 54,951  | 7,054   | 7,688   | 5,926    | 5,725   | 1,982          | 2,148   |
| Telco                  | 13,063    | 12,111  | 1,805   | 1,573   | 1,460    | 1,363   | 655            | 641     |
| Satellite              | 34,624    | 34,941  | 3,873   | 3,510   | 5,426    | 5,603   | 782            | 784     |
| Broadband Only         | 2,979     | 1,627   | 224     | 120     | 361      | 144     | 273            | 171     |

**TABLE 8 – CABLE/SATELLITE HOMES WITH INTERNET STATUS**  
NUMBER OF HOUSEHOLDS (IN 000'S)

| MARKET BREAK   | COMPOSITE  |            | BLACK      |            | HISPANIC   |            | ASIAN AMERICAN |            |
|--|------------|------------|------------|------------|------------|------------|----------------|------------|
|  | Q1<br>2015 | Q1<br>2014 | Q1<br>2015 | Q1<br>2014 | Q1<br>2015 | Q1<br>2014 | Q1<br>2015     | Q1<br>2014 |
| Broadcast Only and<br>Broadband Access               | 6,080      | 5,923      | 612        | 635        | 908        | 941        | 469            | 505        |
| Broadcast Only and No Internet/<br>Narrowband Access | 6,963      | 6,404      | 1,519      | 1,354      | 1,712      | 1,773      | 214            | 165        |
| Cable Plus and<br>Broadband Access                   | 76,771     | 79,941     | 7,798      | 8,184      | 8,501      | 8,813      | 3,227          | 3,444      |
| Cable Plus and No Internet/<br>Narrowband Access     | 22,785     | 20,732     | 4,644      | 4,206      | 3,986      | 3,493      | 270            | 212        |

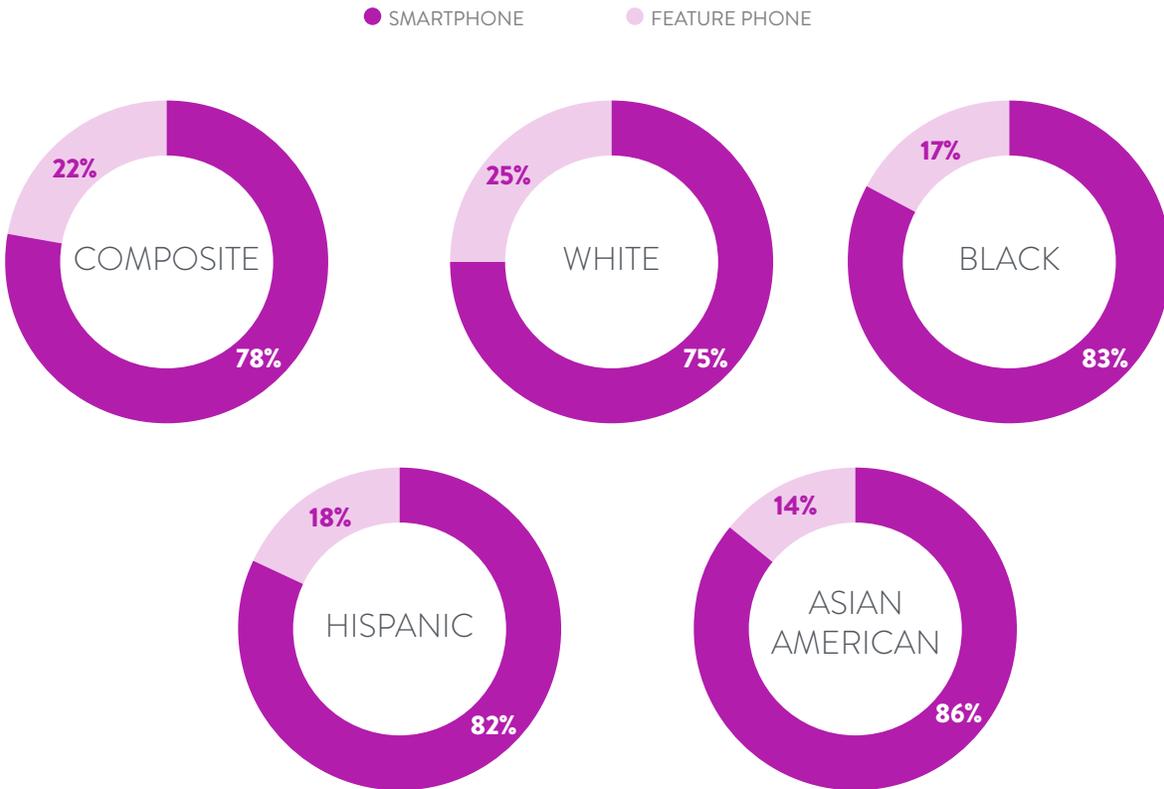
**TABLE 9 – DEVICES IN TV HOUSEHOLDS**  
PERCENTAGE OF HOUSEHOLDS

| MARKET BREAK                 | COMPOSITE  |            | BLACK      |            | HISPANIC   |            | ASIAN AMERICAN |            |
|------------------------------|------------|------------|------------|------------|------------|------------|----------------|------------|
|                              | Q1<br>2015 | Q1<br>2014 | Q1<br>2015 | Q1<br>2014 | Q1<br>2015 | Q1<br>2014 | Q1<br>2015     | Q1<br>2014 |
| DVD/Blu-Ray Player           | 80%        | 81%        | 77%        | 77%        | 76%        | 79%        | 71%            | 73%        |
| DVR                          | 49%        | 49%        | 43%        | 41%        | 41%        | 41%        | 41%            | 43%        |
| Enabled Smart TV             | 16%        | 10%        | 12%        | 7%         | 19%        | 10%        | 25%            | 21%        |
| High Definition TV           | 87%        | 85%        | 84%        | 80%        | 88%        | 85%        | 88%            | 88%        |
| Multimedia Device            | 19%        | 15%        | 14%        | 10%        | 17%        | 15%        | 41%            | 39%        |
| Subscription Video on Demand | 42%        | 36%        | 33%        | 29%        | 41%        | 35%        | 57%            | 50%        |
| Tablet                       | 50%        | 35%        | 42%        | 28%        | 49%        | 32%        | 66%            | 51%        |
| Video Game Console           | 46%        | 47%        | 47%        | 47%        | 54%        | 56%        | 51%            | 54%        |

**TABLE 10 - TELEVISION DISTRIBUTION SOURCES BY ETHNICITY**  
 PERCENTAGE OF HOUSEHOLDS

|                        | COMPOSITE | WHITE | BLACK | HISPANIC | ASIAN AMERICAN |
|------------------------|-----------|-------|-------|----------|----------------|
| Broadcast Only         | 11%       | 10%   | 13%   | 16%      | 15%            |
| Wired Cable (No Telco) | 45%       | 45%   | 47%   | 38%      | 46%            |
| Telco                  | 12%       | 12%   | 12%   | 10%      | 15%            |
| Satellite              | 30%       | 31%   | 26%   | 35%      | 18%            |
| Broadband Only         | 3%        | 3%    | 1%    | 2%       | 7%             |

**EXHIBIT 2 - MOBILE DEVICE PENETRATION BY ETHNICITY**  
 NUMBER OF HOUSEHOLDS (IN 000'S)



# SOURCING & METHODOLOGIES

## GLOSSARY

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

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

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

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

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

**MULTIMEDIA DEVICE:** Viewing on an Apple TV, Roku, Google Chromecast, Smartphone, Computer/Laptops, etc. connected to the TV.

**NARROWBAND ACCESS:** A household that accesses the Internet via a telephone line (often referred to as dial-up).

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

**SUBSCRIPTION VIDEO ON DEMAND (SVOD):** a household with access to a subscription video on demand service, such as Netflix, Amazon Prime and Hulu Plus.

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

**TRADITIONAL TV:** Watching live or time-shifted content on a television set.

**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.

**WIRED CABLE:** Traditional cable delivered through wires to your home.

## TELEVISION METHODOLOGY

“On Traditional TV” includes Live usage plus any playback viewing within the measurement period. Time-shifted TV is playback primarily on a DVR but includes playback from video on demand, DVD recorders, server based DVR’s and services like Start Over.

“On Traditional TV” reach includes those viewing at least one minute within the measurement period. This includes Live viewing plus any playback within the measurement period. First Quarter 2015 Television data are based on the following measurement interval: 12/29/14-03/29/15. As of February 2011, “DVR Playback” has been incorporated into the Persons Using Television (PUT) statistic.

Metrics for “Using a DVD/Blu-Ray Device” and “Using a Game Console” are based on when these devices are in use for any purpose, not just for accessing media content. For example, “Using a Game Console” will also include time when the game console is being used to play video games.

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

## ONLINE METHODOLOGY

In July 2011, an improved hybrid methodology was introduced in Nielsen’s NetView and VideoCensus product. This methodology combines a census level accounting of page views and video streams where Nielsen measurement tags have been deployed in order to project audience and behavior to the full universe of all Internet users. For VideoCensus, the portion of the total video streams calibrated by census data, previously allocated to Home/Work computers, are now allocated to other devices and locations such as smartphones and viewing outside of home and work. This change affects both “Watching Video on the Internet” and “Using the Internet” figures. Beginning in Q1 2012, Cross-Platform metrics are derived from the new hybrid panel. Year-over-year trends are available beginning in Q3 2012. Data should not be trended to previous quarters’ published editions.

Hours:minutes for Internet and video use are based on the universe of persons who used the Internet/watched online video. All Internet figures are weekly or monthly averages over the course of the quarter. All “Using the Internet on a Computer” metrics are derived from Nielsen NetView, while all “Watching Video on the Internet” metrics are derived from Nielsen VideoCensus. While the audience of “Watching Video on the Internet” is a subset of “Using the Internet on a Computer”, overall time spent for “Watching Video on the Internet” should not be subtracted from “Using the Internet on a Computer” due to variations in the methodology and calculations.

As of January 2014, two factors led to an increase in “Watching Video on the Internet.” Secure or https streaming of videos was added into reporting for entities such as Facebook. Additionally, YouTube mobile streams became included within the hybrid reporting.

As a result of a Google Chrome update in late August, some panelists using Google Chrome had their Nielsen meter extension disabled resulting in the underreporting of passively measured https, or secure content in the September and October 2014 Netview and VideoCensus data. Separately, for Netview, FireFox v34 browser update released in December 2014 impacts the ability of our PC Meter to collect some of the web activity for FireFox users who upgraded their browsers; this issue was resolved in February 2015. Also, there was an intermittent tagging issue affecting some YouTube audience views within VideoCensus in December 2014. As a result of these issues, “Using the Internet on a Computer” and “Watching Video on the Internet” were underreported during this time.

## AM/FM RADIO METHODOLOGY

Audience estimates for 48 large markets are based on a panel of people who carry a portable device called a Personal People Meter (PPM) that passively detects exposure to content that contains inaudible codes embedded within the program content. Audience estimates from the balance of markets and counties 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.

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

Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements.

## MOBILE METHODOLOGY

Nielsen's Electronic Mobile Measurement (EMM) is an observational, user-centric approach that uses passive metering technology on smartphones to track device and application usage on an opt-in convenience panel. Results are then reported out through Nielsen Mobile NetView 3.0. There are approximately 5,000 panelists in the U.S. across both iOS and Android smartphone devices. This method provides a holistic view of all activity on a smartphone as the behavior is being tracked without interruption.

A number of steps are taken after the data collection process to ensure the reported data is representative of the mobile population. Weighting controls are applied across five characteristics (gender, age, income, race and ethnicity) while independent enumeration studies are carried out on a continuous basis to provide the most current estimates of the mobile population (aka Universe Estimation). This mobile population is drawn from a combination of Mobile Insights, as well as surveying the National People Meter (NPM) panel that is the industry standard for TV Ratings.

Figures reported in Nielsen's Mobile NetView 3.0 include those individuals who are P18+ who have used an iOS or Android smartphone device in the U.S. during Q1 of 2015. In particular:

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

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

Due to this methodology change from survey based data to EMM as of the Q4 2013 Total Audience Report report, data should not be trended to previous quarters' published editions. The current report contains the revised metrics for the prior year data in the year-over-year comparisons.

## SOURCING

### EXHIBIT 1 & TABLES 1, 2, 3, 4 - AVERAGE TIME SPENT PER ADULT 18+ PER DAY, A WEEK IN THE LIFE, OVERALL USAGE BY MEDIUM, MONTHLY TIME SPENT BY MEDIUM IN HOURS:MINUTES USERS 2+, MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES

Source: Traditional TV, Time-shifted TV, DVD, Game Consoles, Multimedia Devices 12/29/14-03/29/15 via Nielsen NPOWER/NPM Panel, Online 01/01/15-03/31/15 via Nielsen Netview and Nielsen VideoCensus, Mobile 01/01/15-03/31/15 via Nielsen Electronic Mobile Measurement, Radio 01/02/14-12/03/14 via RADAR 124.

Table 1 is based on the total U.S. population whether or not they have the technology Exhibit 1 & Tables 2 - 4 are based on users of each medium.

Electronic Mobile Measurement is based on P18+. Radio RADAR data is based on P12+. Therefore, P2+ would be based on P18+ for Smartphone and P12+ for Radio.

Multimedia Devices is now a combination of usage of the Internet Connected Devices viewing source (includes devices like Apple TV, Roku, Google Chromecast, Smartphones) and Audio-Video viewing sources (includes devices like Computer/Laptops, Tablets, Karaoke Machines, Video Camcorders, Security/Digital Cameras) that are regularly connected to a home television set. Prior year data within this report has been adjusted to reflect this change as well.

### TABLE 5 – CROSS PLATFORM HOMES RANKED BY IN-HOME BEHAVIOR

Source: 01/01/15-03/31/15 via Nielsen NPOWER/Cross Platform Homes Panel for P2+. Internet and Streaming based on home PC only.

### TABLE 6 – SMARTPHONE VIDEO VIEWING QUINTILES

Source: 01/01/15-03/31/15 via Electronic Mobile Measurement for P18+. Smartphone video viewing quintiles are grouped based on users' time per person per month watching video on a Smartphone.

### TABLE 7, 8–TELEVISION DISTRIBUTION SOURCES, CABLE/SATELLITE HOMES WITH INTERNET STATUS

Source: Based on the Universe Estimates for the 15th of each month within the quarter via Nielsen NPOWER/NPM Panel.

### TABLE 9, 10 - DEVICES IN TV HOUSEHOLDS, TELEVISION DISTRIBUTION SOURCES BY ETHNICITY

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

### EXHIBIT 2 – MOBILE DEVICE PENETRATION BY ETHNICITY

Source: Mobile 01/01/15-03/31/15 via Nielsen Mobile Insights.

Note: represents insufficient sample size while n/a represents data unavailability.

## PAGE 4-9:

Source: Traditional TV 01/26/15-03/01/15 via Nielsen NPOWER/NPM Panel, Radio 01/02/14-12/03/14 via RADAR 124, PC - Total, Streaming Audio, Social Networking 01/26/15-03/01/15 via Nielsen Netview, PC Streaming Video 01/26/15-03/01/15 via Nielsen VideoCensus, Smartphone – App/Web Total, Streaming Video, Streaming Audio, Social Networking 01/26/15-03/01/15 via Nielsen Electronic Mobile Measurement, iOS and Android, Tablet – App/Web Total, Streaming Video, Streaming Audio, Social Networking 01/26/15-03/01/15 via Nielsen Electronic Mobile Measurement – unweighted, projections based on estimates from the NPOWER/NPM Panel. P18+

## ABOUT NIELSEN

Nielsen N.V. (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers Watch and Buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services across all devices where content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90 percent of the world's population.

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