SPECIAL WORK FROM HOME EDITION

THE NIELSEN TOTAL AUDIENCE REPORT

AUGUST 2020

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AUDIENCE INSIGHTS

To say 2020 has been one of volatility, uncertainty and caution among consumers as well as small and big businesses would be an understatement of epic proportion.

COVID-19, cultural and civil unrest and continued evolution in the media landscape have altered all aspects of our everyday lives. The way we shop for groceries, receive medical care—even how we see each other—have all been upended. Many changes won't be temporary, and this disruption will breed a slew of transformations that are here to stay, many of which are already evident.

Yet during times of great distress comes opportunity for innovation, ingenuity and triumph—the core of our American experience.

During the Great Depression, for example, the car radio, conceptualized decades prior, finally became a reality in 1930. Radio remains relevant today—and a worthy companion for the socially distant. King Kullen, the first supermarket, also opened in 1930, debuting a revolutionary model in food retailing and marketing that still exists today. And during the Spanish Flu of 1918, we witnessed the birth of the modern studio system when Adolph Zukor, co-founder of Paramount Pictures, consolidated an array of distressed theaters into a system that owned every aspect of filmmaking.

As you will see in this report, COVID-19 has catapulted streaming to become the present and future of content creation. Today, it accounts for 25% of our collective time spent with the television among streaming capable homes. Streaming has also taken hold among consumers 55 and older, often a technological sign of ubiquity and resolve.

Amid all the change, however, none is bigger than how many of us work—and that change may be more long-lasting than we originally expected.

The implications of a U.S. workforce that works remotely are seemingly endless. For one, companies will not be reliant on local talent. Then there's the cultural and political exchange of city dwellers moving to less dense regions and vice-versa. That will have economic, voting and marketing implications—as well as opportunities. In a very short period, housing trends are already highlighting these shifts, and in many locations, demand outweighs inventory. That inventory, however, will need to be tech-enabled for our evolving lifestyles.

A decade ago, the U.S. Census reported that nearly 11% of the 128 million strong U.S. workforce either worked from home some or all of their time. COVID-19 has boosted that number, and everyone should be applying this reorientation to their critical thinking when it comes to driving ROI and thinking about their workforce.

For this report, we dove into remote working to assess how work-from-home consumers are adapting—and performing. Importantly, our research highlights just how quickly Americans have adapted and now WANT to work remotely, largely due to the flexibility it affords. In a special survey that we conducted, 73% of respondents said that working from home gives them the freedom and flexibility that best suits their needs, and 80% of them prefer to work for companies that allow them to do so!

We think that this consumer preference, as well as this special analysis using our unparalleled panel to uncover real and actionable insights in media habits of remote workers, is a crucial piece of intelligence for the media industry and beyond and something only Nielsen can do.

While we are encouraged that COVID-19 might someday be mitigated, if not fully eradicated, some of the habits that consumers pick up from this time will stick. And small to big businesses all stand to win if they are agile enough to meet consumer demand, identify implications and understand the marketing challenges and rewards of these habitual and geographic changes we are only beginning to uncover.

Thanks,

Peter

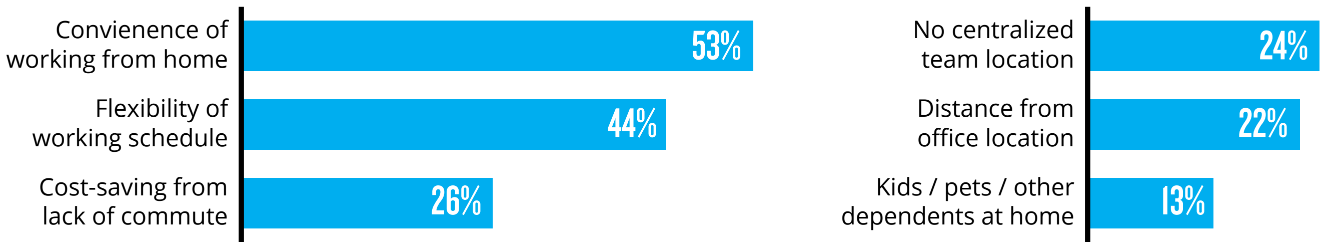
TRADING SPACES: HOME HAS BECOME THE NEW OFFICE

HOW DO CONSUMERS FEEL ABOUT THIS CHANGE OF PACE?

Prior to COVID-19, working from home or remotely was still more of a career luxury than a necessity. With the onset of this global pandemic, companies the world over had a business imperative: enable remote working (if possible) with a degree of creativity or suffer a great loss of productivity, employee trust and engagement and, for publicly traded entities, a decline in shareholder value—all alongside a potential for revenue drops.

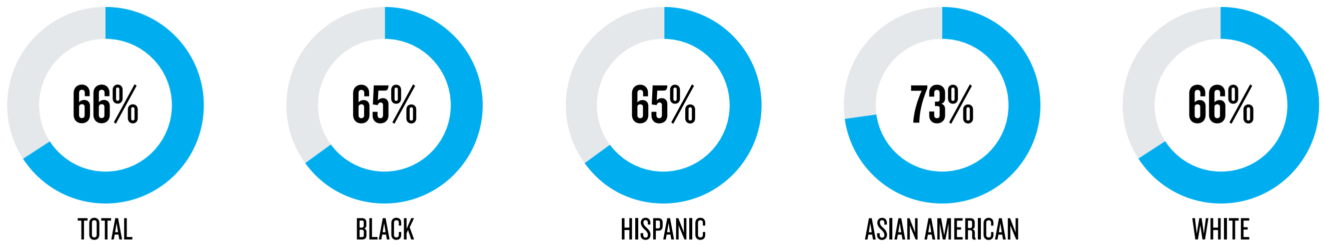
According to The Nielsen Remote Workers Consumer Survey, a survey of 1,000 adults who worked from home prior to and during the novel coronavirus outbreak, two-thirds of respondents are new to working from home full time as a result of COVID-19. While working from home is fraught with its own challenges, such as toddlers crawling around during virtual meetings, home-schooling pushy teenagers and sharing an office space with your significant other (or, gasp, all three!), respondents also love the convenience of working from home, still feel engaged with their current role and responsibilities and think it's easier to strike a work/life balance.

REASONS ADULTS WORKED FROM HOME AT LEAST OCCASIONALLY PRIOR TO OUTBREAK



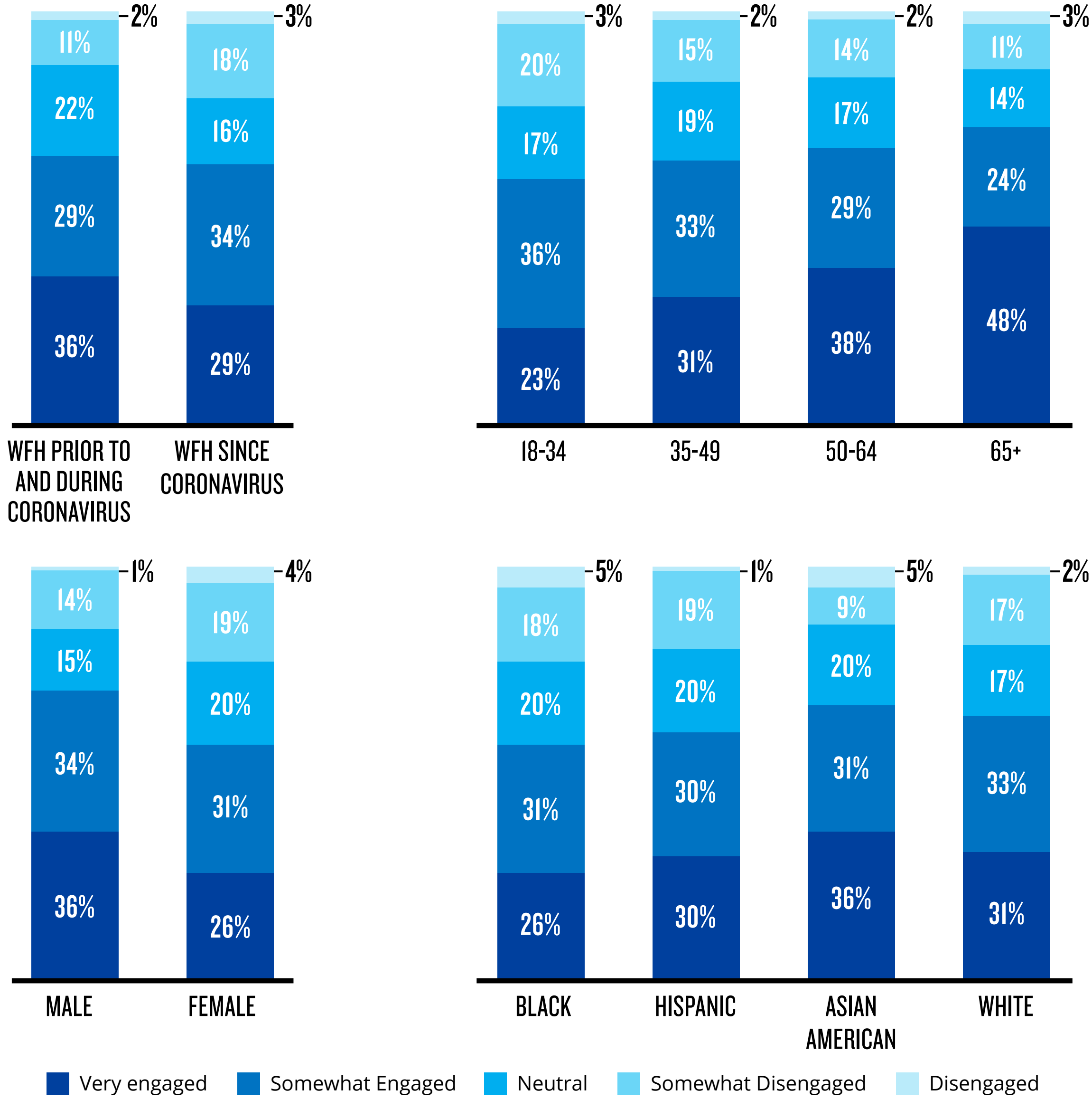
Base: Worked from home prior to virus outbreak

AS OF JUNE 2020, PERCENT OF RESPONDENTS WHO STARTED WORKING FROM HOME SINCE THE CORONAVIRUS OUTBREAK



Base: Remote workers

HOW ENGAGED ARE WORK-FROM-HOME CONSUMERS?



Base: Remote workers

It takes more than a few months of time to get accustomed to the massive lifestyle change that working from home brings. Despite the relatively short amount of time some have had to get acquainted with this change of pace, the disparity in engagement levels between those already working from home prior to COVID-19 and those who moved to remote work at the hands of the pandemic is relatively small overall. Just two percentage points separate those who worked from home before the pandemic and feel somewhat or very engaged (65%) to those who feel the same way but started working from home during the pandemic (63%). However, engagement levels vary prominently depending on race and ethnicity, age and gender, so there is still, literally, work to be done here. Companies have an impetus – perhaps now more than ever – to work to ensure that, beyond diversity, there are best-practices implemented to keep a diverse workforce engaged as a way to foster productivity.

HOME COMPANIONS: MEDIA USE OF WORK-FROM-HOME EMPLOYEES

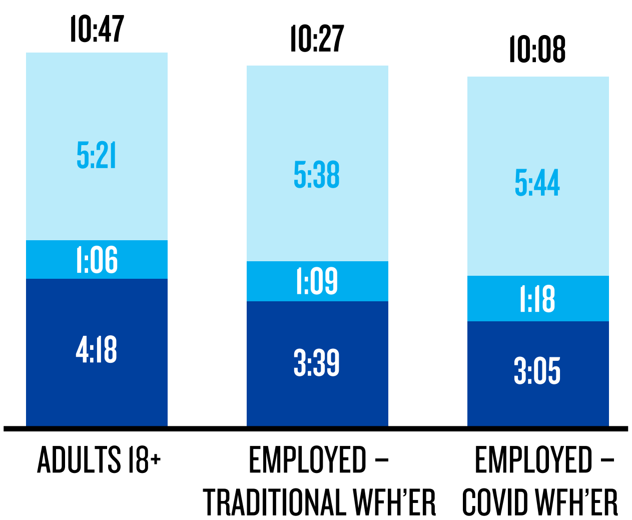
CONSUMERS MAY BE WORKING FROM HOME, BUT THEY STILL LISTEN, WATCH AND CONSUME

Multitasking in today's world is the rule, not the exception, so it's no surprise that work-from-homers have turned to media to keep them company, pre-occupy them or perhaps even to replace the hum of a chatty office with a gaggle of talking heads.

Beyond survey data on sentiment, Nielsen was also able to leverage its observational panel in combination with a custom Scarborough survey linked up with our Total Media Fusion methodology. Looking at the cross-platform viewing habits of custom demographics for adults 18+ that worked from home before COVID-19 and those that began working from home during it, we found that in both instances, these groups go digital (computer/smartphone/tablet). While those that worked from home prior to coronavirus spend more time throughout the entire day viewing content, work-from-homers that have done so during COVID-19 spend more time on digital as well as TV-connected devices and have a larger share of viewing to digital sources (57%). Brands and agencies looking to reach either work from home group have an impetus to reach these consumers where they work, literally, via their digital marketing strategies.

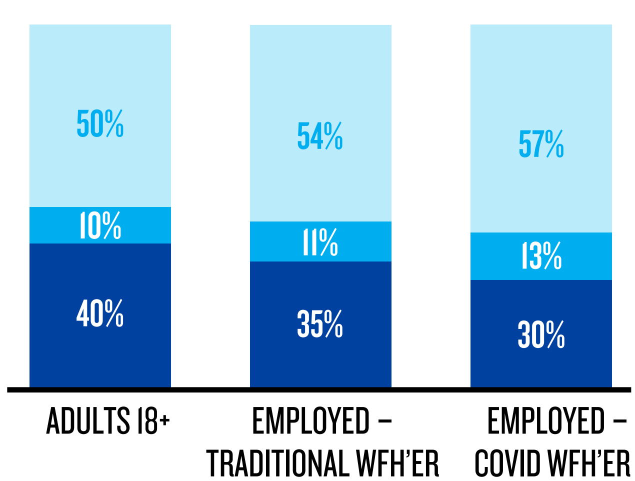
DAILY HOURS:MINS OF USAGE ON TV AND DIGITAL

FEB-APR 2020, TOTAL DAY



SHARE OF DAILY TIME SPENT ON TV AND DIGITAL

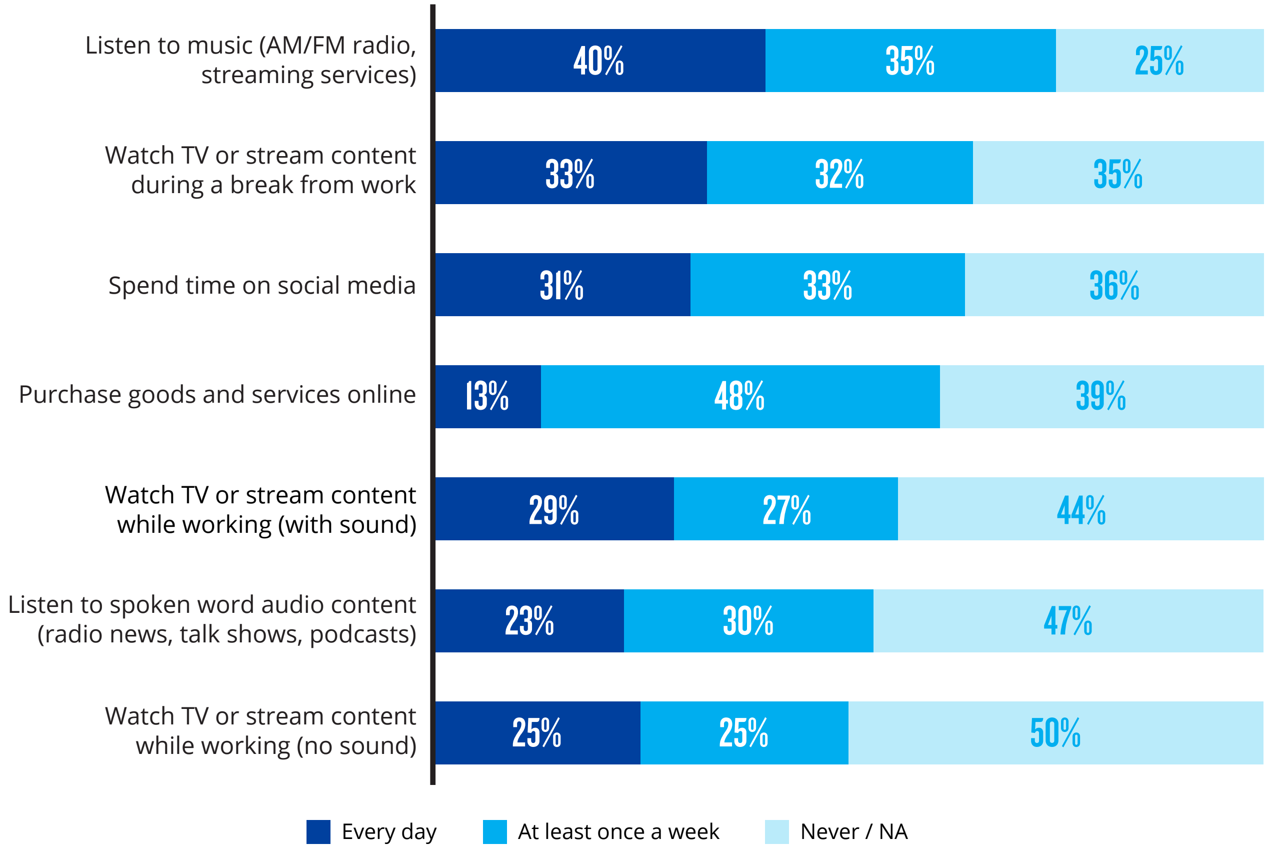
FEB-APR 2020, TOTAL DAY



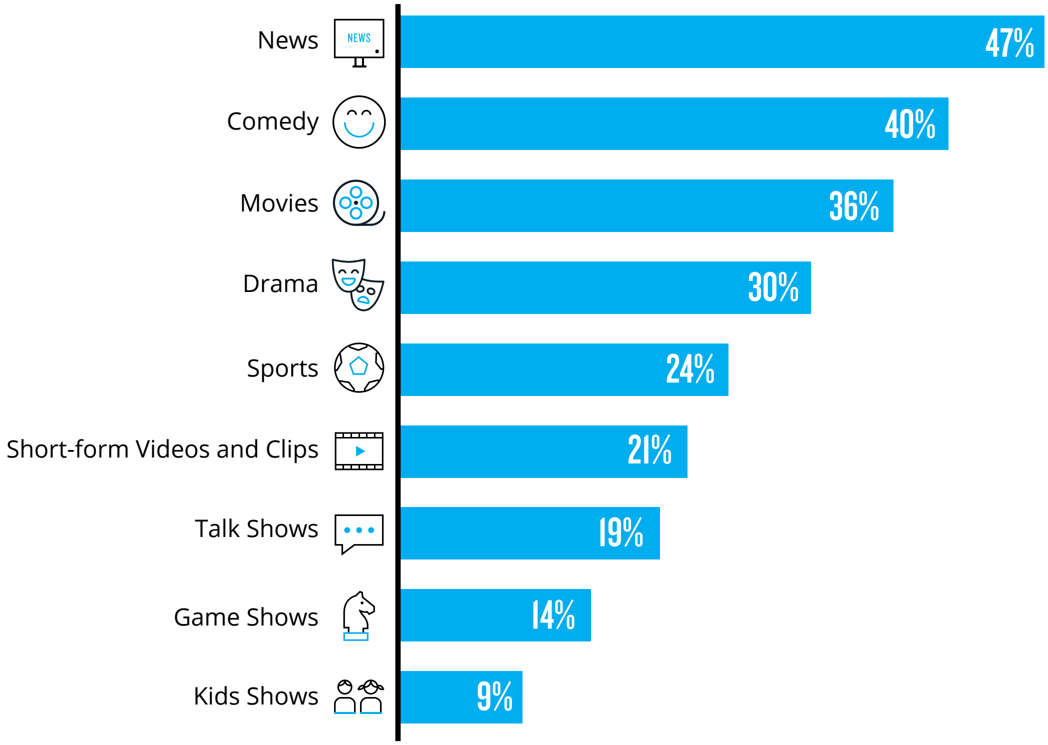
Live+Time-Shifted TV TV-Connected Devices *(DVD, Game Console, Internet Connected Device)* Digital

Nielsen found that while there may be less commuting going on with this section of the workforce, these consumers still rely on radio quite a bit. After all, a love of music is a hard habit to break, and it's one that most consumers don't want to disconnect from regardless of their location. Rather than shutting radio out of their marketing mixes, brands might want to consider adjusting their strategies to reach listeners who may be on the job instead of on the *way* to one. Importantly, 75% of people noted that they listen to music while working at least once a week, and 40% of those listeners do so daily.

WHAT THEY ARE DOING DURING WORK HOURS



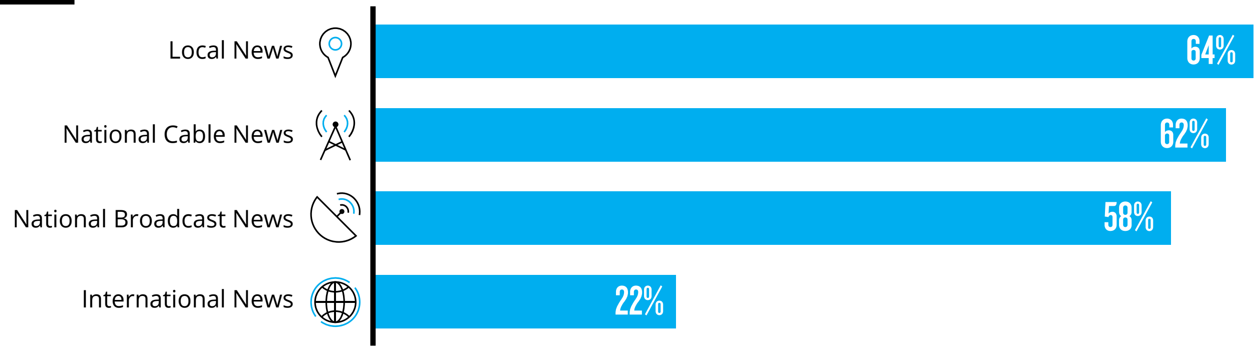
TYPES OF TV AND STREAMING CONTENT VIEWED WHILE WORKING FROM HOME



Base: Watch TV or stream content while working from home

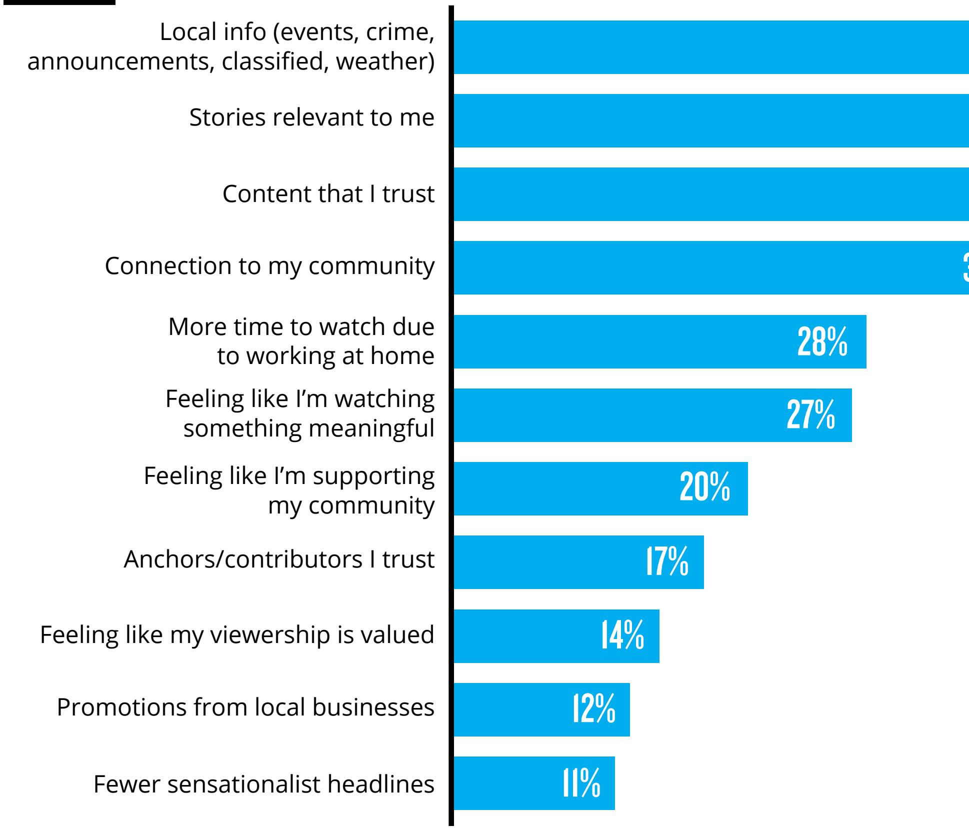
Daytime television has seen a shift in its usual viewer demographics as a result of COVID-19, as many people who used to be at work now have the TV on at home during their work day. Given the uncertain and rapidly changing times, news is the most popular type of content viewed or streamed. And among that news content local news is king, as quarantine restricts our movement and puts a newfound focus on our immediate surroundings. Unsurprisingly, after getting one's fill of the events of the day many viewers turn to comedy as a way to escape.

NEWS CONTENT VIEWED WHILE WORKING FROM HOME



Base: Watch TV or stream news content while working from home

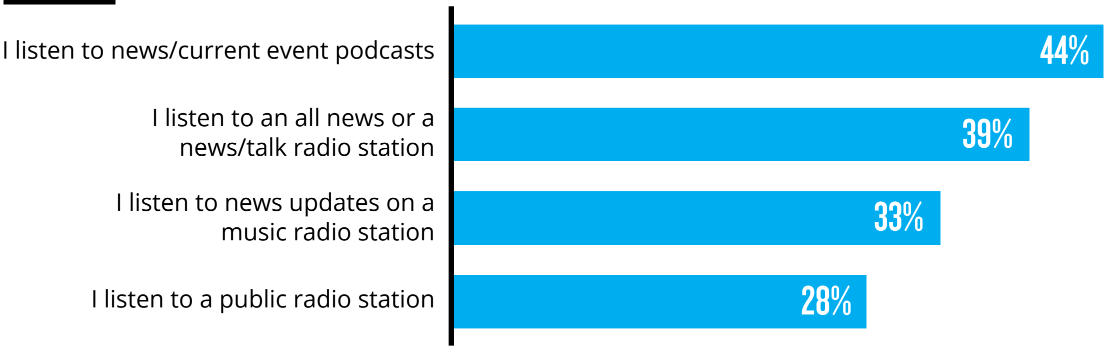
REASONS LOCAL NEWS IS WATCHED WHILE WORKING FROM HOME



Base: Watch local news content while working from home

In addition to proximity, there are many other reasons why local news is being embraced more than ever, both on TV and through AM/FM radio and podcasts. Nielsen's survey shows an increase in spending locally, and local news is a way to bolster individual's connection with the community. Trust is also a major concern, as many people look to anchors and content that provide reliable and relevant information.

TYPES OF LOCAL NEWS LISTENED TO WHILE WORKING FROM HOME



Base: Listen to spoken word audio content while working from home

DUAL INTENTIONS: STRIKING THE WORK/LIFE BALANCE

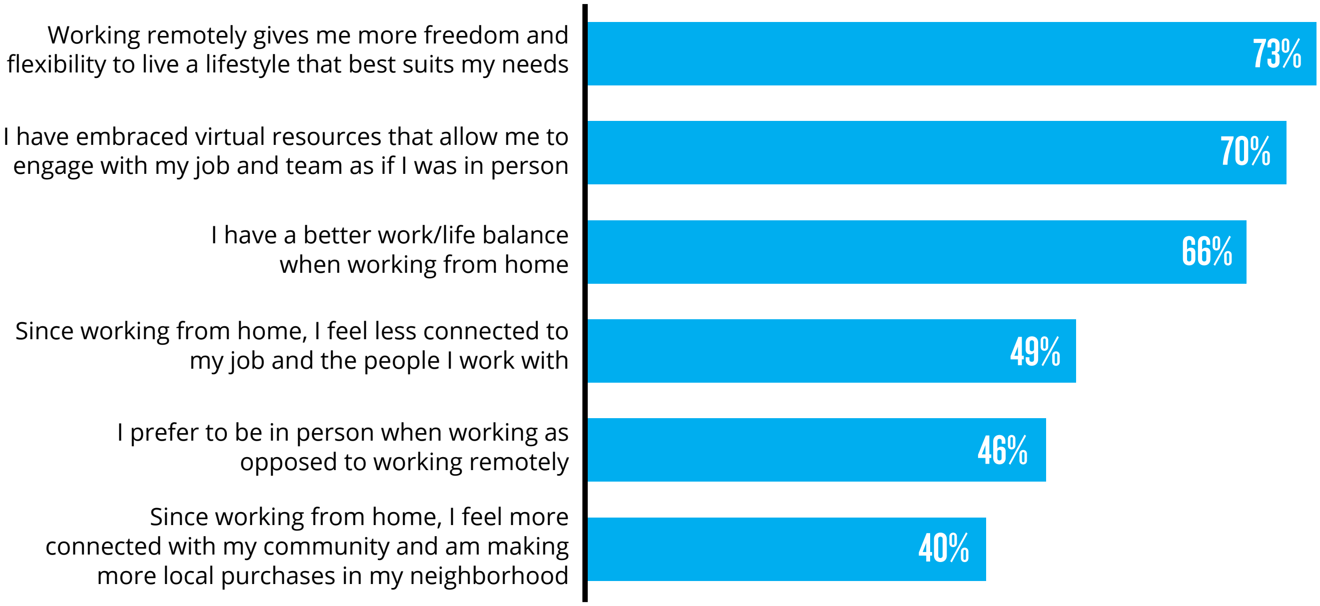
BLURRED LINES: NO COMMUTE AND THE FLEXIBILITY TO WORK OFF HOURS ARE THE SECRET TO PRODUCTIVE WORK FROM HOME EMPLOYEES' SUCCESS!

As if holding down gainful employment, raising children or simply trying to get ahead in life—or a combination of all three and then some—wasn't stressful enough, throw an unprecedented pandemic at the American dream and there has never been a more important time for companies to take stock of the health of their associates. It's especially crucial if they want to maintain a productive workforce that might be missing the structure that in-person office culture tends to bring.

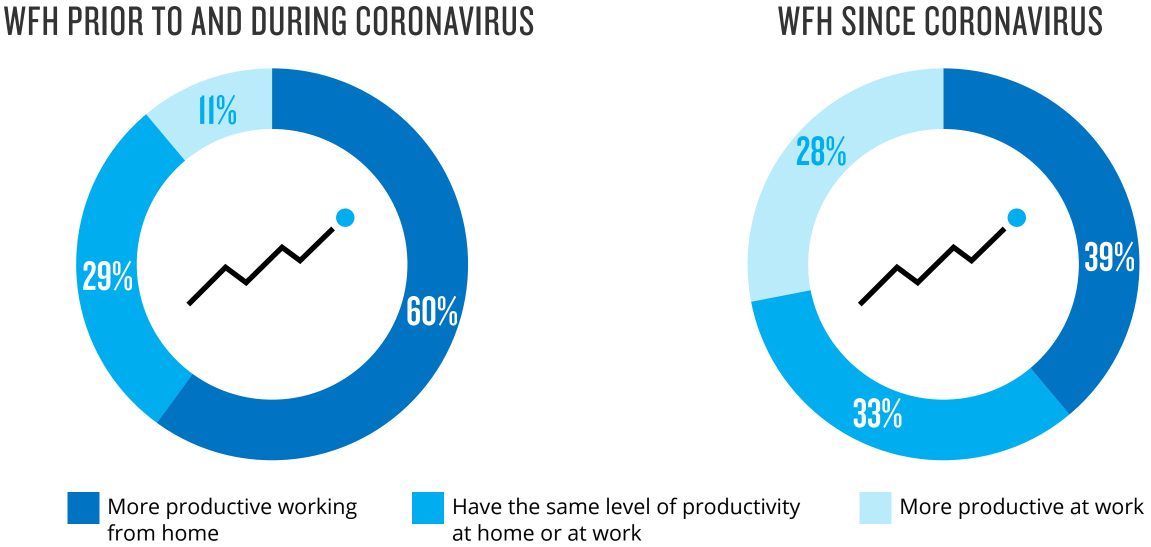
Nielsen's survey found that work-from-home consumers are largely enjoying this change in daily routine, as it's allowed them to strike a better balance between working and living their best lives. In fact, 40% of people feel more connected to their community and are making more local purchases. Regional agencies, advertisers and media owners all stand to capitalize on consumers who might now be sticking closer to home.

HOW CONSUMERS ARE FEELING ABOUT WORKING FROM HOME

Top 2 Box (Out of 5 - Strongly/Somewhat Agree)



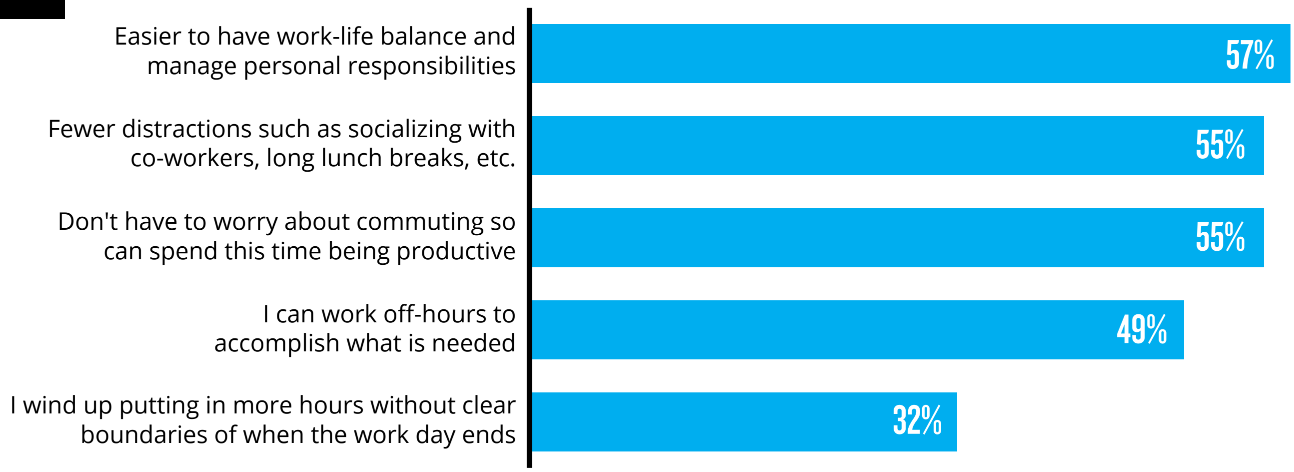
PERCEIVED PRODUCTIVITY WHILE WORKING FROM HOME



While the level of engagement may be similar, perceived productivity while at work varies between those who worked from home prior to versus as a result of the pandemic. Unsurprisingly, those with more experience working from home have, in most cases, had less upheaval to their daily routines, and 89% feel that they have been equally or more productive working from home as a result. However, 72% of new work-from-home respondents have also maintained or increased their productivity during these trying times.

One of the great ironies of the COVID-19 pandemic is that, in a time when many facets of life are restricted or closed altogether, many workers are experiencing new found freedoms. Since beginning to work from home, over half (57%) of workers have found it easier to manage to find a healthier work-life balance, even putting in time off-hours to ensure work gets done comfortably. The time saved not spent commuting helps too!

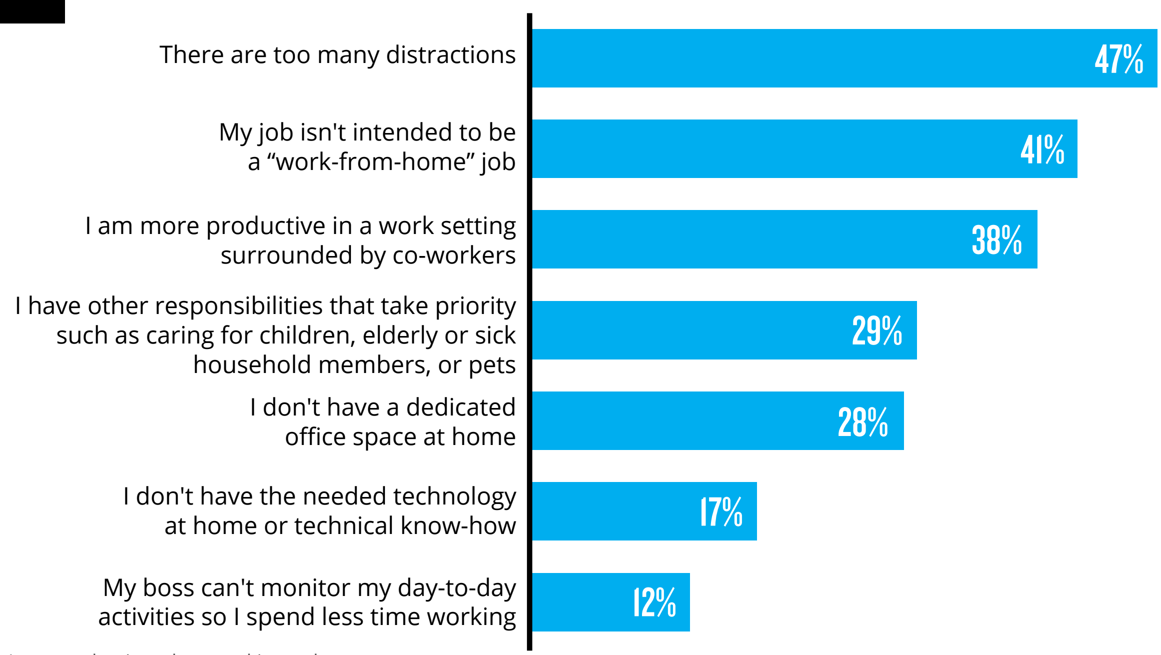
REASONS WORKERS ARE MORE PRODUCTIVE WORKING AT HOME



Base: More productive when working at home

However, not everyone was prepared or equipped to maintain their working style, especially on almost zero notice. Those workers who feel they are less productive working from home cite the many distractions of home life, including caring for children, pets and the elderly. Not all homes are created equal either, and 28% of workers are less productive because they do not have a dedicated office or workspace in their residence. And some jobs simply aren't solo projects, and are better served in person.

REASONS WORKERS ARE LESS PRODUCTIVE WORKING AT HOME

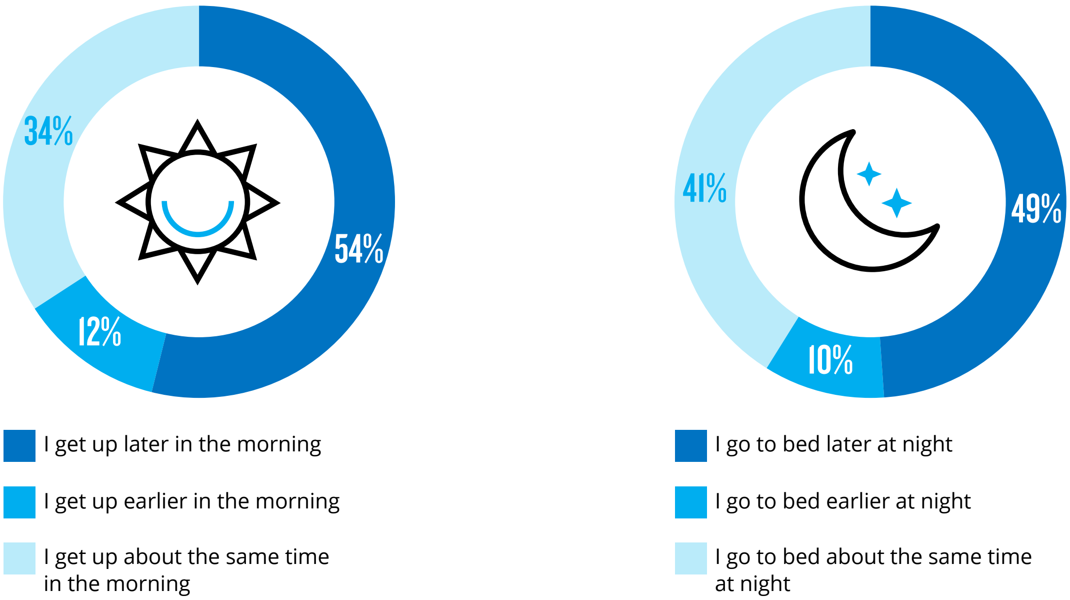


Base: Less productive when working at home

ABOUT THAT MORNING ROUTINE…

The ability to work from home during the coronavirus has also brought about another unexpected shift in employee behaviors: sleep schedule. Over half (54%) of workers who have switched to a work-from-home schedule since COVID-19 now get up later than they did previously, and nearly half (49%) hit the sheets later at night than they did when they have to go into work. Of course, not having to worry (as much) about wardrobe and styling decisions helps maximize time, as does not schlepping into the office during a commute, so it is important programmers, brands and marketers to note that this free time is often spent consuming additional media, whether it's streaming the latest TV series, listening to music or browsing the web.

LIFESTYLE CHANGES AS A RESULT OF WORKING FROM HOME



Base: Started working from home due to virus outbreak

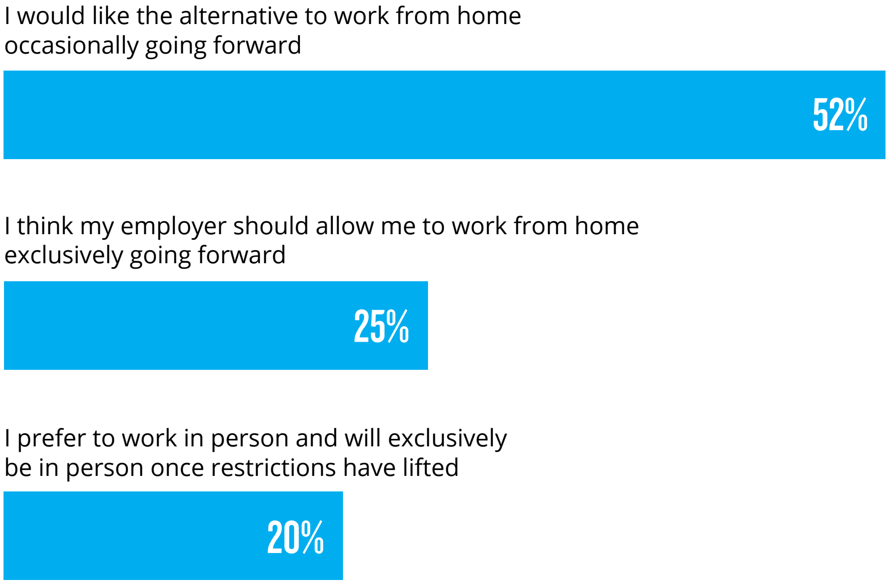
REMOTE CONTROL: THE FUTURE OF WORKING FROM HOME

CONSUMERS ARE USED TO HAVING CHOICE, AND 42% OF THEM MAY WANT THAT POWER APPLIED TO THEIR CHOICE OF A WORKING LOCALE.

While many work-from-homers have had little choice BUT to work remotely, as offices closed down to help foster social distancing and keep associates safe, a funny thing happened on the way to re-emergence: Workers embraced remote working and found liberty in what was originally a restrictive and unavoidable set of mitigation measures. This is directly influenced by their motivations as consumers fully immersed in an on-demand society that values flexibility, personal freedom and, most of all, control when it comes to media choice, time and content.

To put it simply, consumers are hooked on choice and now want the liberty to choose what location is best-suited for them. In fact, 42% of work-from-home employees would consider relocating if given the option of working remotely from anywhere, and of those a whopping 80% would prefer to work for a company that gives them the freedom to pick a location of their choosing, regardless of where their office is.

IDEAL WORKING SITUATION ONCE RESTRICTIONS ARE LIFTED



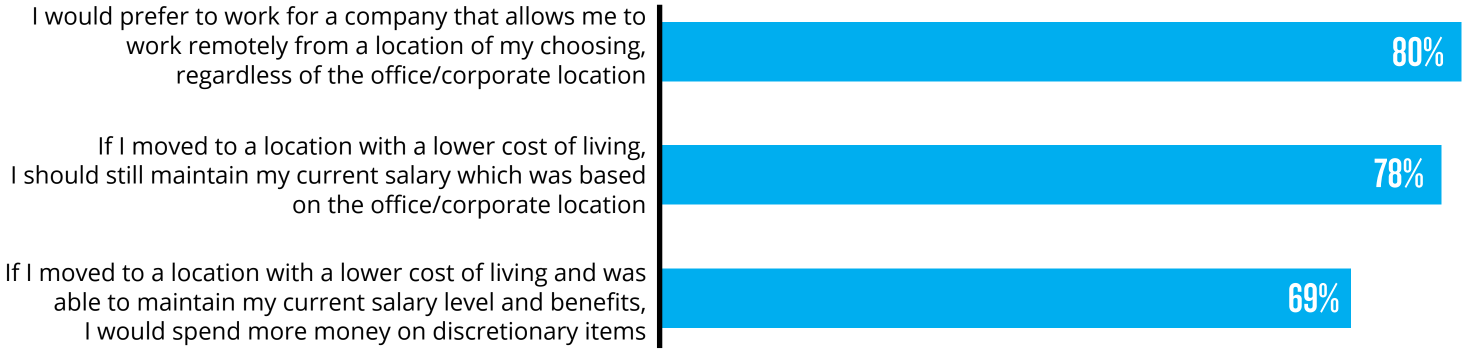
Base: Started working from home due to virus outbreak

42%

IF MY EMPLOYER GAVE ME THE ABILITY TO WORK REMOTELY FROM "ANYWHERE," I WOULD CONSIDER MOVING TO A DIFFERENT LOCATION

Consumer desire to take control of their working location—during a period when many life decisions are made based on COVID-19—is perhaps the greatest harbinger of a potential change in the landscape of the country. That radical shift of income could influence everything from consumables to media to goods and services, not to mention having an immediate impact on a variety of sectors locally, from housing to quick-service restaurants to auto.

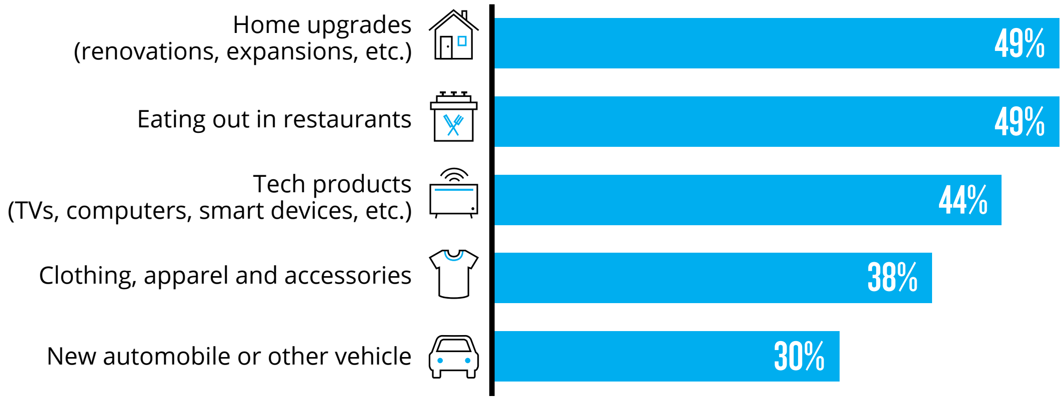
FEELINGS REGARDING FUTURE WORK-FROM-HOME OPPORTUNITIES



Base: Would consider moving to a different location if employer gave the ability to work remotely from anywhere

This privilege comes with a catch though: 78% believe that if they relocate they should still maintain their current salary and benefits. In turn, 69% would choose to use any additional disposable income as a result of relocation to bolster the economy, spending freely on discretionary items such as home upgrades, eating out more in restaurants, and the latest tech products.

DISCRETIONARY SPENDING PLANNED WITH THE SAME SALARY AND A LOWER COST OF LIVING



Base: Would spend more on discretionary items if new location had lower cost of living and salary/benefits were maintained

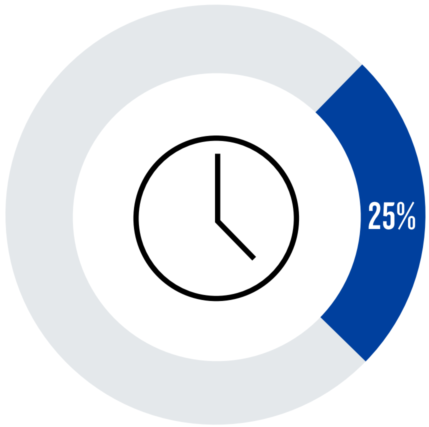
STEPPING INTO STREAMING

As the Nielsen Remote Workers Consumer Survey has shown, many consumers have more free time at home than ever due to a lack of commute, a propensity to stay up later at night and the immediate restrictions on external activities brought upon by socially distancing. In the wake of these restrictions, our collective appetite to stream video content—which was already growing more voracious by the day—has accelerated even more rapidly among people of all ages.

As such, the amount of time people are spending in front of the TV screen viewing streaming content continues to grow. According to data from Nielsen's Streaming Meter, a subset of nearly 1,000 streaming capable homes from the National TV panel, as of Q2 2020 streaming now comprises one-fourth of all television minutes viewed, with Netflix being the largest contributor to streaming share at 34%, followed by YouTube at 20%. In a short amount of time, newcomer Disney+ now accounts for 4% of total streaming time.

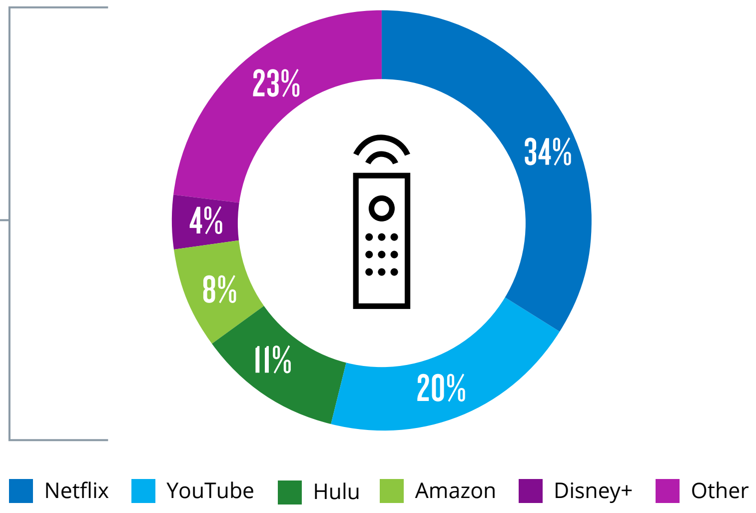
% OF STREAMING OUT OF TOTAL USAGE OF TV

AMONG STREAMING CAPABLE HOMES
Q2 2020, P2+

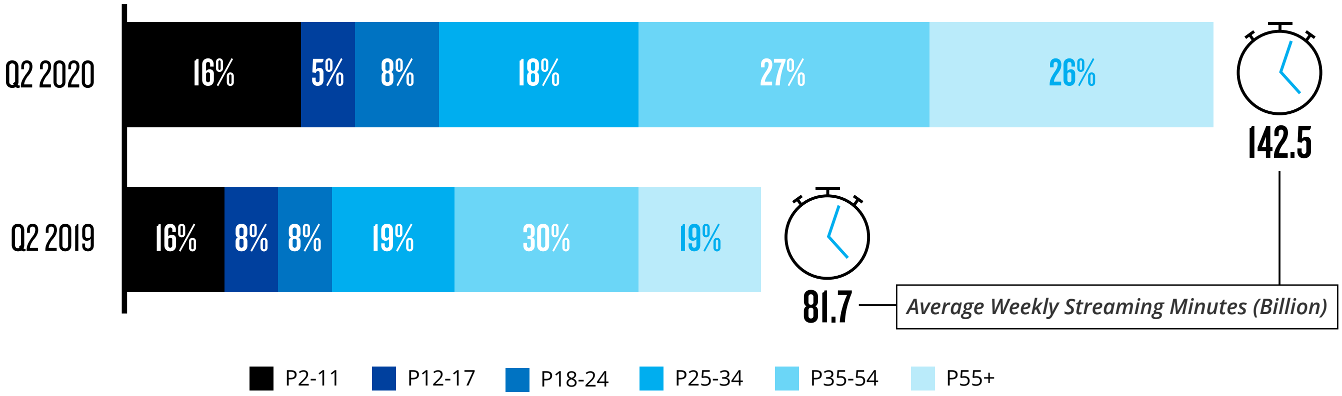


VIDEO STREAMING DISTRIBUTION % BY BRAND

Q2 2020, P2+

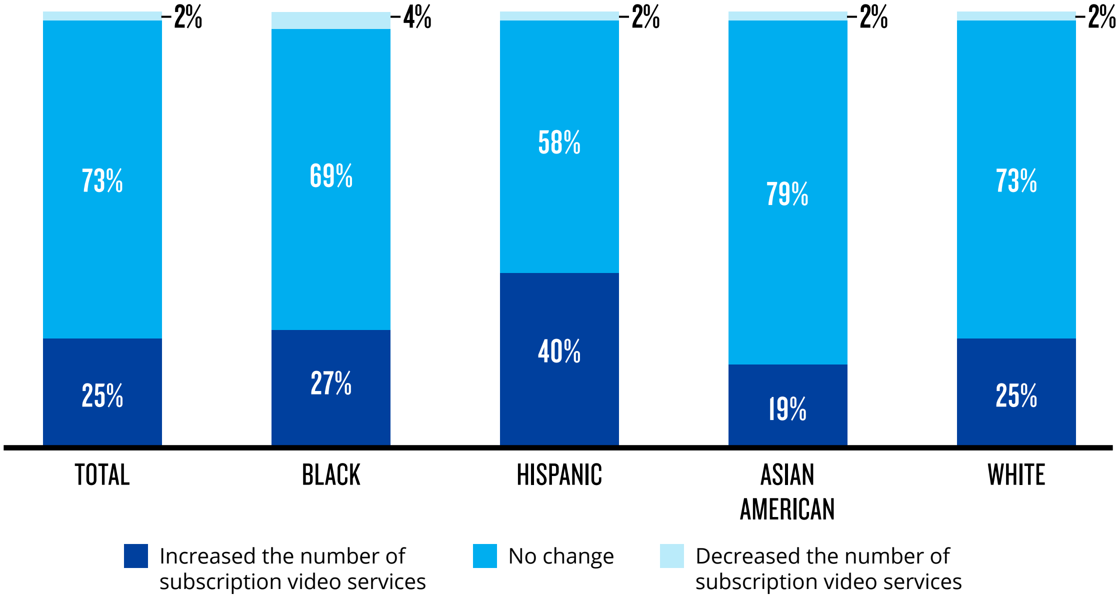


STREAMING VIDEO SHARE OF TIME SPENT BY AGE



One of the most intriguing developments with regard to streaming over the past year has been how viewers of all ages have embraced the platform. This especially goes for older consumers ages 55 and up, whose usage now comprises 26% of all streaming minutes viewed, up from 19% one year ago. When one takes into consideration how the overall base of total streaming minutes has also grown during that time, this represents a significant shift among what was already the heaviest television viewing group. It may have taken them longer to embrace the technology, but now that they have, there is no indication they are going to give up streaming in the future.

ACTION TAKEN IN THE PAST THREE MONTHS TOWARDS PAID VIDEO SERVICES SUBSCRIBED TO



Base: Subscribe to at least one paid, subscription video streaming service

Not only are total streaming minutes steadily increasing, but the number of services people are willing to budget for and subscribe to continues to grow as well. According to the The Nielsen Remote Worker Consumer survey, only 2% of adults are reducing their number of paid subscription services, while 25% have added a service in the past three months. Hispanics have adopted new services even more wholeheartedly at 40%. With the number of new streaming entities coming to market and the demand for both original and legacy content growing by the day, it will be interesting to see how the streaming market evolves in the coming months.

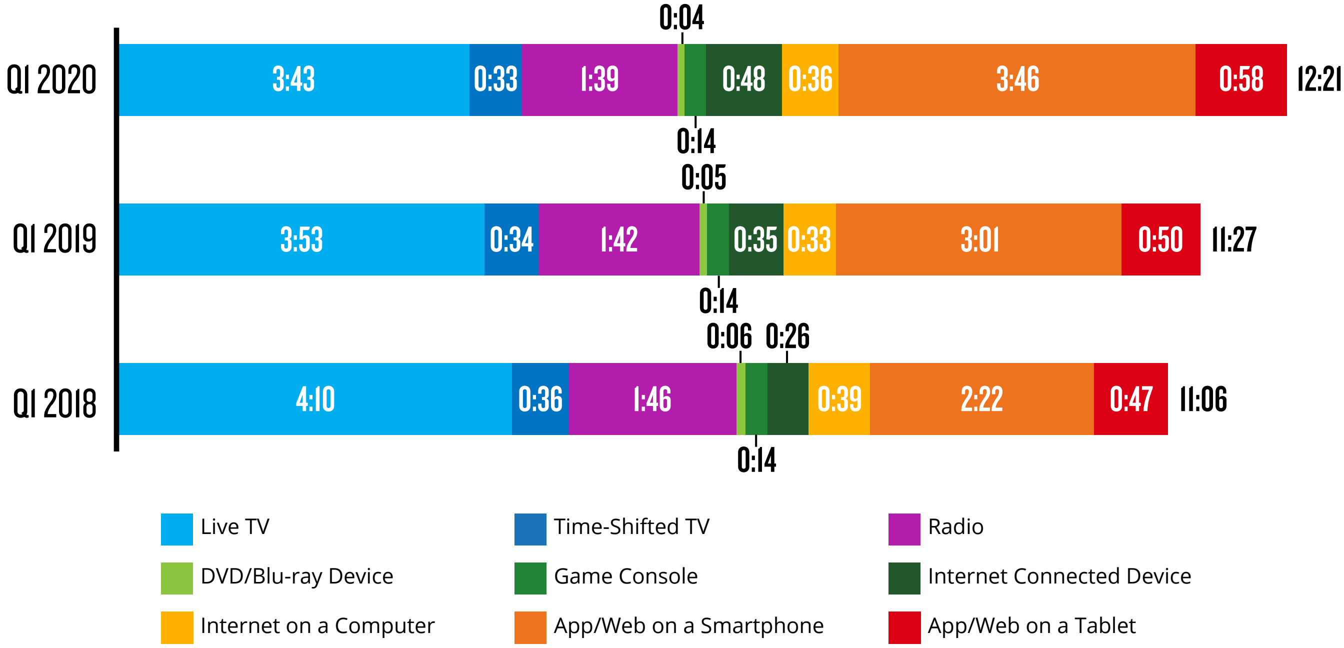
Q1 2020 CHARTS

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

MEDIA CONNECTED CONSUMERS

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

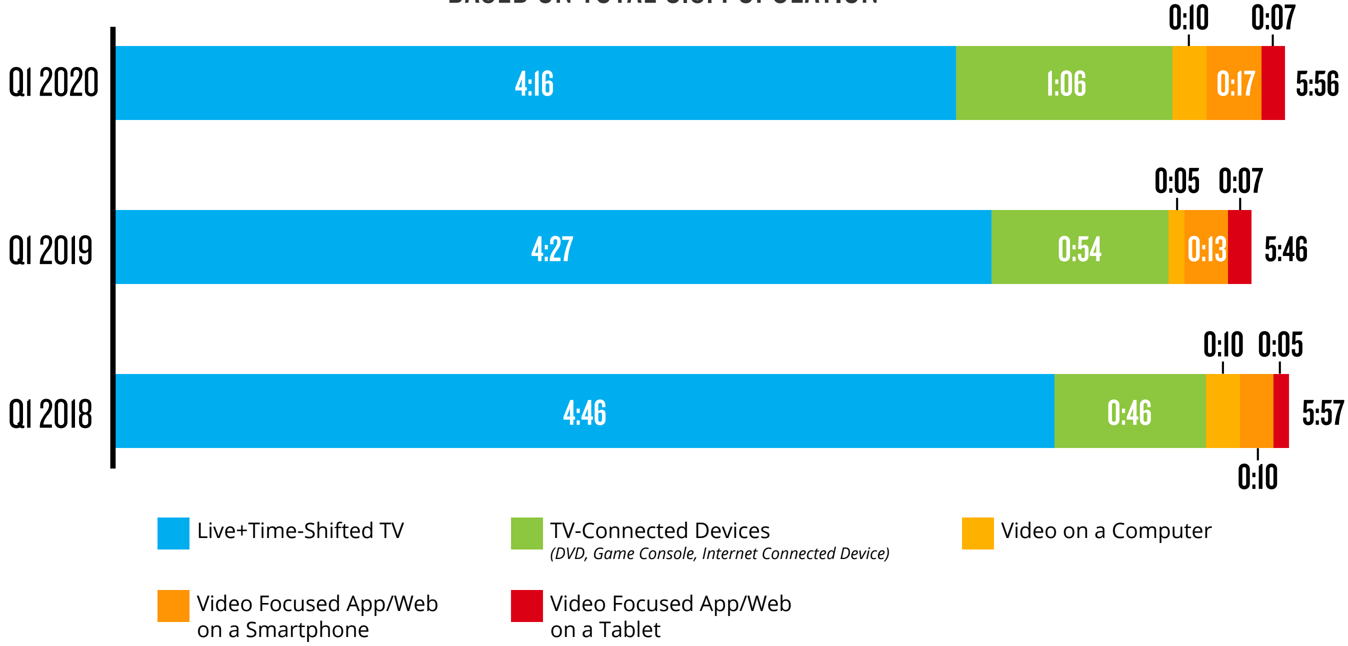
BASED ON TOTAL U.S. POPULATION



Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage. Measurement enhancements to the mobile panel in the past year contributed to increases in usage levels beyond pure organic growth.

AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

BASED ON TOTAL U.S. POPULATION



WEEKLY REACH ACROSS PLATFORMS

Q1 2020 WEEKLY REACH % OF USERS 18+ AMONG U.S. POPULATION

LIVE+TIME-SHIFTED TV

	Total	Black	Hispanic	Asian American	White
Reach	85%	88%	82%	71%	86%
YOY Change	-1%	-1%	-3%	1%	-1%

RADIO

	Total	Black	Hispanic	Asian American	White
Reach	91%	91%	95%	NA	88%
YOY Change	-1%	-1%	-1%	NA	-1%

DVD/BLU-RAY DEVICE

	Total	Black	Hispanic	Asian American	White
Reach	10%	7%	8%	6%	11%
YOY Change	-2%	-3%	-2%	-2%	-2%

INTERNET ON A COMPUTER

	Total	Black	Hispanic	Asian American	White
Reach	58%	52%	46%	66%	59%
YOY Change	5%	6%	3%	4%	5%

GAME CONSOLE

	Total	Black	Hispanic	Asian American	White
Reach	15%	15%	16%	11%	15%
YOY Change	-1%	-1%	-2%	-2%	0%

APP/WEB ON A SMARTPHONE

	Total	Black	Hispanic	Asian American	White
Reach	85%	85%	87%	87%	85%
YOY Change	6%	4%	6%	4%	6%

INTERNET CONNECTED DEVICE

	Total	Black	Hispanic	Asian American	White
Reach	49%	47%	52%	54%	49%
YOY Change	7%	9%	6%	5%	7%

APP/WEB ON A TABLET

	Total	Black	Hispanic	Asian American	White
Reach	46%	40%	43%	51%	47%
YOY Change	1%	-2%	1%	1%	2%

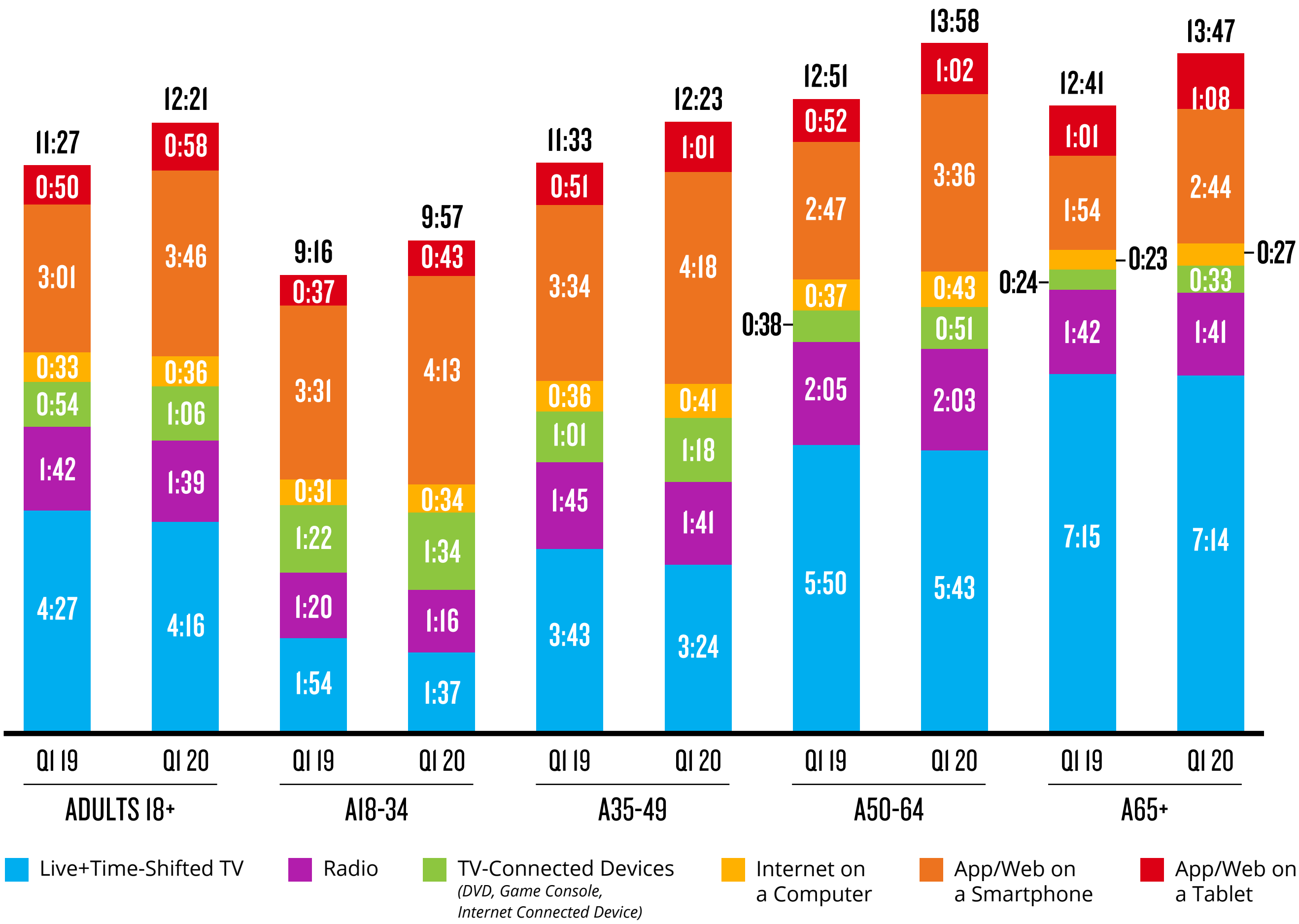
Total | Black | Hispanic | Asian American | White | YOY Change

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

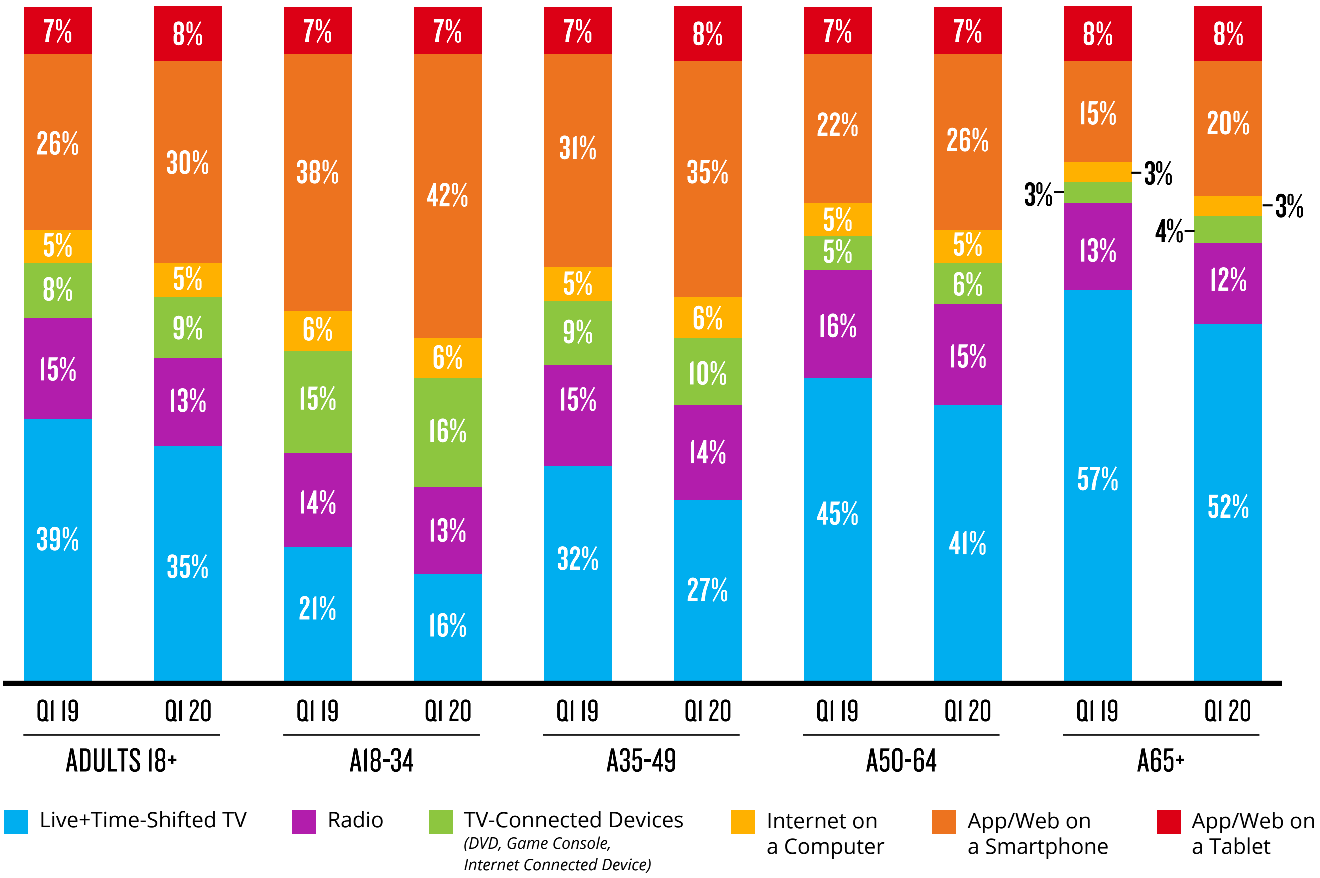
DAILY HOURS:MINS OF USAGE

BASED ON TOTAL U.S. POPULATION



SHARE OF DAILY TIME SPENT BY PLATFORM

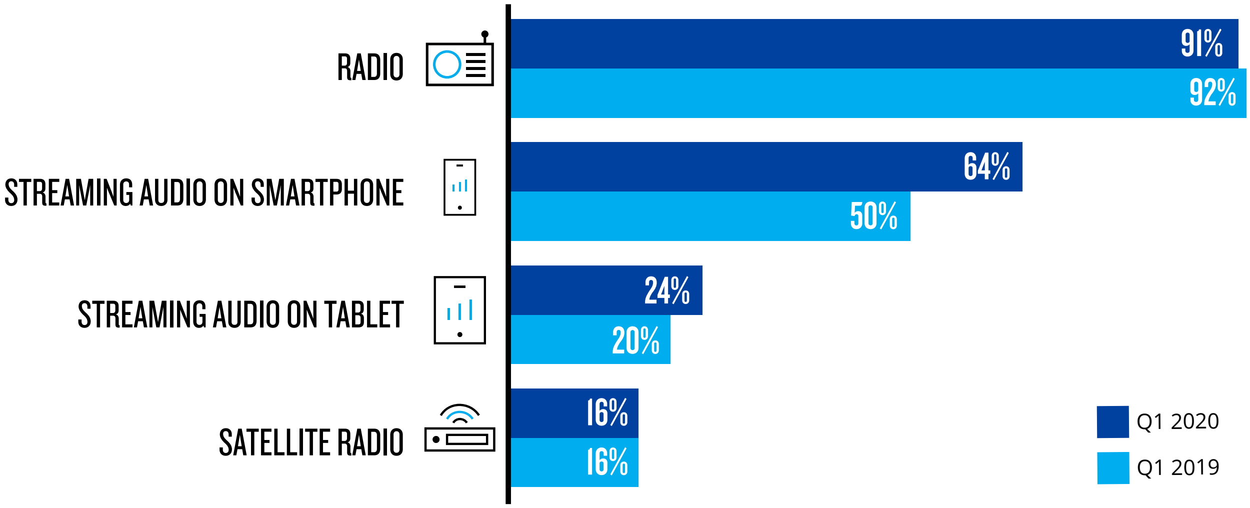
BASED ON TOTAL U.S. POPULATION



THE AUDIO UNIVERSE

WEEKLY REACH OF AUDIO AMONG ADULTS 18+

BASED ON TOTAL U.S. POPULATION

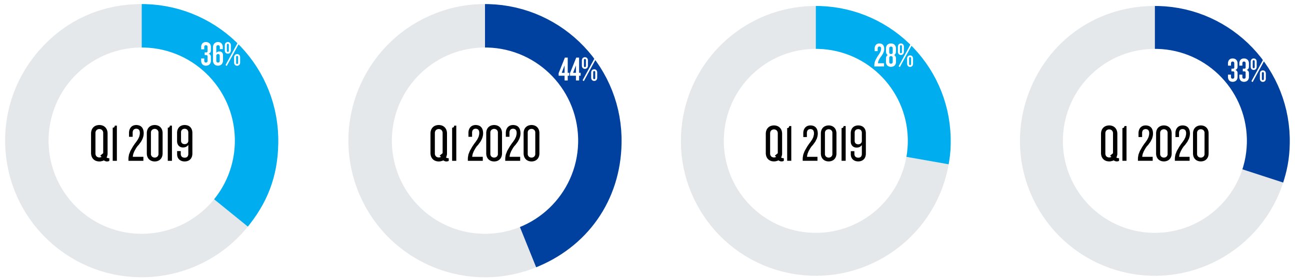


VOICE ASSISTANT REACH

BASED ON TOTAL U.S. POPULATION 18+

SMART SPEAKER PENETRATION

BASED ON U.S. HOUSEHOLDS



THE MULTICULTURAL CONSUMER

AVERAGE TIME SPENT PER ADULT 18+ PER DAY

BASED ON TOTAL U.S. POPULATION

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	Q1 2019	Q1 2020	Q1 2019	Q1 2020	Q1 2019	Q1 2020	Q1 2019	Q1 2020	Q1 2019	Q1 2020
Live TV	3:53	3:43	5:37	5:17	2:49	2:40	1:56	1:54	3:53	3:43
Time-shifted TV	0:34	0:33	0:32	0:30	0:19	0:17	0:15	0:16	0:38	0:37
Radio	1:42	1:39	1:48	1:44	1:46	1:40	NA	NA	1:40	1:37
DVD/Blu-ray Device	0:05	0:04	0:05	0:04	0:04	0:03	0:03	0:02	0:05	0:04
Game Console	0:14	0:14	0:17	0:17	0:14	0:14	0:09	0:08	0:14	0:14
Internet Connected Device	0:35	0:48	0:39	0:59	0:38	0:50	0:42	0:53	0:34	0:46
Internet on a Computer	0:33	0:36	0:25	0:29	0:24	0:25	0:43	0:46	0:34	0:38
App/Web on a Smartphone	3:01	3:46	3:26	4:18	3:09	4:00	3:11	3:42	2:55	3:40
App/Web on a Tablet	0:50	0:58	0:49	0:51	0:45	0:42	0:51	1:05	0:50	0:59
Total	**11:27**	**12:21**	**13:38**	**14:29**	**10:08**	**10:51**	**7:50***	**8:46***	**11:23**	**12:18**

*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.

DATA TABLES

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

Q1 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	37:37	22:16	32:55	45:58	54:25	27:05	31:45	49:44	28:27	22:38	37:50
Live+Time-Shifted TV	29:53	11:21	23:48	40:01	50:36	16:59	22:04	40:28	20:38	15:12	30:23
Time-Shifted TV	3:53	1:19	3:31	5:24	6:04	2:18	3:07	3:27	2:01	1:52	4:20
TV-Connected Devices	7:44	10:55	9:07	5:56	3:49	10:07	9:41	9:16	7:49	7:26	7:27
DVD/Blu-ray Device	0:27	0:20	0:32	0:31	0:27	0:25	0:29	0:26	0:21	0:16	0:29
Game Console	1:39	3:38	1:44	0:28	0:10	2:46	2:10	2:00	1:37	0:58	1:36
Internet Connected Device	5:38	6:57	6:52	4:57	3:12	6:55	7:02	6:50	5:52	6:12	5:22
Radio	11:32	8:50	11:45	14:18	11:44	10:09	11:21	12:09	11:38	na	11:18
Internet on a Computer	4:15	3:58	4:46	5:02	3:10	4:20	4:38	3:23	2:54	5:25	4:26
Social Networking	0:37	0:26	0:40	0:51	0:35	0:32	0:38	0:24	0:19	0:47	0:40
Video on a Computer	1:12	1:44	1:17	1:04	0:30	1:32	1:26	1:10	0:59	1:35	1:11
App/Web on a Smartphone	26:21	29:29	30:07	25:14	19:07	29:46	30:32	30:05	28:01	25:57	25:37
Video Focused App/Web on a Smartphone	2:00	3:02	2:17	1:23	0:58	2:41	2:20	3:00	3:05	1:48	1:45
Streaming Audio	0:55	1:37	0:51	0:36	0:25	1:16	1:04	1:04	1:00	1:01	0:52
Social Networking	6:13	8:37	6:55	5:00	3:32	7:51	7:21	6:47	7:05	6:25	6:01
App/Web on a Tablet	6:44	5:04	7:08	7:16	7:58	6:00	6:37	5:58	4:56	7:33	6:56
Video Focused App/Web on a Tablet	0:52	0:59	1:04	0:51	0:29	1:01	1:03	0:54	0:52	1:06	0:50
Streaming Audio	0:11	0:12	0:13	0:10	0:06	0:13	0:13	0:11	0:10	0:12	0:11
Social Networking	1:11	1:03	1:12	1:15	1:18	1:07	1:10	1:00	0:53	1:21	1:14

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

Q1 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	39:34	24:23	33:40	46:49	55:47	28:53	32:58	50:39	29:48	27:08	39:19
Live+Time-Shifted TV	33:15	13:52	25:37	41:33	52:21	19:45	24:29	42:47	23:16	20:29	33:12
Time-Shifted TV	7:05	2:59	5:44	8:36	10:50	4:30	5:25	6:13	4:44	4:39	7:31
TV-Connected Devices	12:18	15:12	12:21	10:14	9:01	13:52	13:15	15:15	12:05	11:50	11:51
DVD/Blu-ray Device	4:10	4:45	4:19	3:58	3:47	4:30	4:26	5:26	4:04	4:12	3:59
Game Console	10:20	12:22	8:33	6:48	5:58	10:57	9:56	11:57	9:12	8:21	10:12
Internet Connected Device	10:37	11:36	10:44	9:56	9:18	11:11	11:10	13:21	10:30	10:45	10:11
Radio	12:46	10:02	12:43	15:19	13:25	11:17	12:20	13:23	12:13	na	12:47
Internet on a Computer	7:23	7:18	7:38	8:09	6:08	7:28	7:41	6:31	6:18	8:12	7:31
Social Networking	1:58	1:31	1:56	2:19	2:08	1:44	1:54	1:39	1:31	2:03	2:01
Video on a Computer	3:38	5:16	3:32	2:56	2:01	4:27	4:01	4:17	4:01	3:52	3:30
App/Web on a Smartphone	30:54	32:50	32:31	28:57	3:53	32:41	33:08	35:17	32:06	29:40	30:11
Video Focused App/Web on a Smartphone	2:47	3:41	2:46	2:03	1:56	3:16	2:50	3:56	3:54	2:28	2:30
Streaming Audio	1:26	2:04	1:13	1:01	0:57	1:42	1:28	1:35	1:32	1:31	1:23
Social Networking	7:41	9:50	7:46	6:13	5:38	8:53	8:15	8:21	8:31	7:45	7:29
App/Web on a Tablet	14:33	13:36	13:36	14:48	16:25	13:36	13:40	14:46	11:25	14:50	14:41
Video Focused App/Web on a Tablet	3:01	3:53	3:13	2:58	1:46	3:32	3:26	3:18	2:56	3:31	2:56
Streaming Audio	0:44	0:55	0:48	0:45	0:23	0:52	0:50	0:54	0:41	0:43	0:43
Social Networking	3:28	4:04	3:17	3:19	3:18	3:38	3:26	3:26	2:54	3:38	3:28

Q1 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	224,582	59,727	56,027	58,803	50,025	115,754	112,677	28,893	36,797	13,298	164,083
Live+Time-Shifted TV	213,224	52,739	53,057	57,766	49,663	105,796	105,153	27,895	34,235	11,902	156,338
Time-Shifted TV	131,206	28,863	35,515	37,993	28,836	64,377	68,034	16,569	16,684	6,437	99,401
TV-Connected Devices	145,699	47,655	42,493	34,370	21,181	90,148	85,709	17,646	24,737	9,865	106,204
DVD/Blu-ray Device	25,498	4,600	6,992	7,781	6,125	11,592	12,551	2,383	3,243	1,026	20,395
Game Console	36,494	19,649	11,662	3,995	1,187	31,311	25,711	4,839	6,685	1,798	26,464
Internet Connected Device	123,209	39,598	36,810	29,531	17,269	76,408	73,780	14,850	21,326	9,058	89,092
Radio	228,277	65,499	56,789	59,044	46,945	122,288	116,047	28,876	39,241	na	158,847
Internet on a Computer	144,678	40,012	37,936	38,971	27,759	77,948	75,498	16,389	18,837	11,226	108,287
Social Networking	79,194	20,678	20,845	23,157	14,514	41,523	41,640	7,617	8,763	6,584	60,732
Video on a Computer	82,508	24,305	22,018	22,793	13,392	46,323	44,553	8,655	9,961	6,975	62,186
App/Web on a Smartphone	214,001	66,015	56,253	54,936	36,797	122,268	115,110	26,882	35,762	14,882	155,804
Video Focused App/Web on a Smartphone	180,040	60,344	50,101	42,770	26,825	110,445	102,944	24,097	32,365	12,426	128,879
Streaming Audio	160,541	57,336	42,912	37,023	23,269	100,248	91,041	21,316	26,766	11,462	115,324
Social Networking	203,080	64,523	54,196	50,758	33,603	118,719	111,427	25,617	34,110	14,071	147,698
App/Web on a Tablet	116,408	27,403	31,939	30,965	26,102	59,342	60,535	12,765	17,741	8,663	86,829
Video Focused App/Web on a Tablet	71,729	18,617	20,119	18,104	14,889	38,736	38,294	8,679	12,129	5,353	52,287
Streaming Audio	60,948	16,384	16,516	14,591	13,458	32,900	32,387	6,555	9,639	4,604	45,403
Social Networking	86,273	19,052	22,364	23,801	21,055	41,416	42,833	9,152	12,516	6,299	64,980

Q1 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	89%	81%	92%	94%	94%	86%	90%	91%	89%	79%	90%
Live+Time-Shifted TV	85%	71%	87%	92%	93%	78%	84%	88%	83%	71%	86%
Time-Shifted TV	52%	39%	58%	60%	54%	48%	54%	52%	41%	38%	55%
TV-Connected Devices	58%	64%	70%	55%	40%	67%	68%	56%	60%	59%	58%
DVD/Blu-ray Device	10%	6%	11%	12%	11%	9%	10%	7%	8%	6%	11%
Game Console	15%	27%	19%	6%	2%	23%	21%	15%	16%	11%	15%
Internet Connected Device	49%	54%	60%	47%	32%	57%	59%	47%	52%	54%	49%
Radio	91%	89%	93%	94%	88%	91%	93%	91%	95%	na	88%
Internet on a Computer	58%	54%	62%	62%	52%	58%	60%	52%	46%	66%	59%
Social Networking	32%	28%	34%	37%	27%	31%	33%	24%	21%	39%	33%
Video on a Computer	33%	33%	36%	36%	25%	34%	36%	27%	24%	41%	34%
App/Web on a Smartphone	85%	90%	93%	87%	69%	91%	92%	85%	87%	87%	85%
Video Focused App/Web on a Smartphone	72%	82%	82%	68%	50%	82%	82%	76%	79%	73%	70%
Streaming Audio	64%	78%	71%	59%	43%	75%	73%	68%	65%	67%	63%
Social Networking	81%	88%	89%	81%	63%	88%	89%	81%	83%	83%	80%
App/Web on a Tablet	46%	37%	53%	49%	49%	44%	48%	40%	43%	51%	47%
Video Focused App/Web on a Tablet	29%	25%	33%	29%	28%	29%	31%	28%	30%	31%	28%
Streaming Audio	24%	22%	27%	23%	25%	24%	26%	21%	24%	27%	25%
Social Networking	34%	26%	37%	38%	39%	31%	34%	29%	31%	37%	35%

Q1 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	34:06	35:38	282,184	89%
Live+Time-Shifted TV	25:50	28:57	264,176	83%
Time-Shifted TV	3:19	6:19	157,120	50%
TV-Connected Devices	8:16	12:29	192,398	61%
DVD/Blu-ray Device	0:29	4:13	32,782	10%
Game Console	1:59	10:09	56,395	18%
Internet Connected Device	5:49	10:29	161,081	51%
Radio (P12+)	11:01	12:17	249,295	90%

KIDS 2-11	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	23:06	21:51	36,625	90%
Live+Time-Shifted TV	12:00	12:08	32,389	80%
Time-Shifted TV	1:20	2:35	17,093	42%
TV-Connected Devices	11:07	13:23	30,338	75%
DVD/Blu-ray Device	0:41	4:44	5,094	13%
Game Console	2:43	8:35	11,662	29%
Internet Connected Device	7:43	11:02	25,452	63%

TEENS 12-17	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
Total Use of Television	16:41	17:37	20,977	84%
Live+Time-Shifted TV	7:36	8:49	18,564	74%
Time-Shifted TV	0:53	2:09	8,820	35%
TV-Connected Devices	9:04	12:31	16,360	65%
DVD/Blu-ray Device	0:22	3:44	2,190	9%
Game Console	4:11	11:36	8,239	33%
Internet Connected Device	4:31	8:06	12,419	50%
Radio	5:58	7:09	21,018	84%

TELEVISION DISTRIBUTION STATUS
% OF TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	JUL 2019	JUL 2020	JUL 2019	JUL 2020	JUL 2019	JUL 2020	JUL 2019	JUL 2020	JUL 2019	JUL 2020
Traditional Cable	72.7%	68.6%	70.7%	66.4%	64.6%	59.9%	61.3%	57.7%	74.2%	70.2%
vMVPD	5.4%	7.7%	4.9%	6.6%	4.8%	6.3%	8.4%	9.0%	5.4%	8.0%
Over-the-Air	13.4%	13.4%	17.6%	17.9%	21.7%	22.1%	14.4%	13.4%	11.9%	11.9%
Broadband-Only	8.6%	10.3%	6.9%	9.1%	8.9%	11.7%	15.9%	20.0%	8.5%	9.9%
Total Multichannel	**78.1%**	**76.3%**	**75.6%**	**73.0%**	**69.4%**	**66.2%**	**69.7%**	**66.7%**	**79.6%**	**78.2%**

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

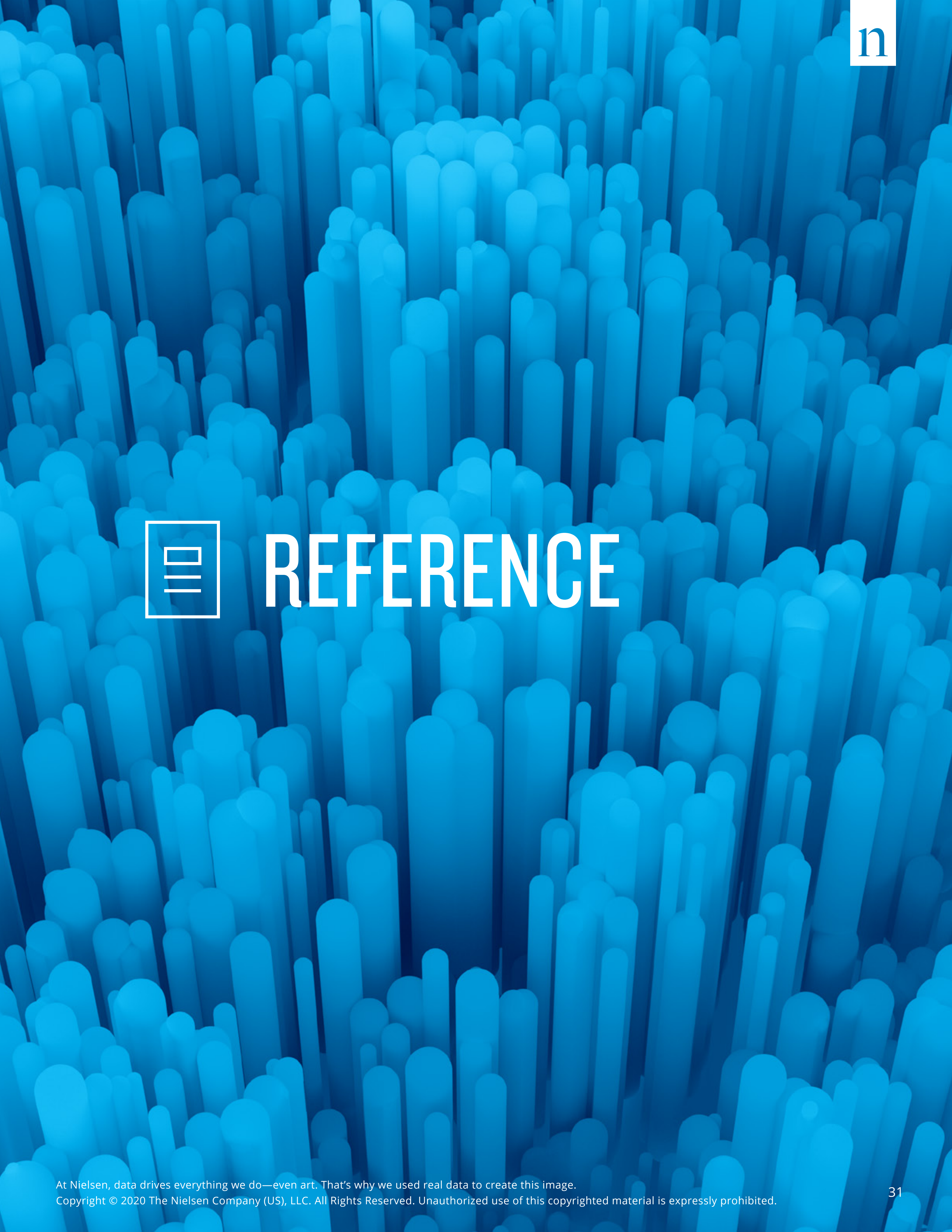
10% of homes that subscribe to a vMVPD also subscribe to a traditional cable services, 26% are over-the-air, and 64% are broadband only households.

DEVICE AND SERVICE OWNERSHIP % IN TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN		WHITE	
	JUL 2019	JUL 2020	JUL 2019	JUL 2020	JUL 2019	JUL 2020	JUL 2019	JUL 2020	JUL 2019	JUL 2020
DVD/Blu-ray Player	61%	57%	50%	45%	46%	43%	51%	47%	64%	61%
DVR	54%	52%	49%	45%	43%	41%	52%	49%	56%	54%
Enabled Smart TV	48%	53%	56%	62%	60%	66%	45%	52%	47%	52%
Internet Connected Device	41%	48%	43%	48%	59%	62%	42%	48%	40%	47%
Game Console	42%	40%	53%	51%	49%	46%	43%	41%	41%	39%
Computer	79%	79%	72%	73%	89%	89%	68%	69%	81%	81%
Smartphone	93%	94%	97%	98%	98%	98%	94%	96%	92%	94%
Tablet	64%	64%	63%	62%	73%	73%	58%	56%	65%	65%
Internet Enabled TV-Connected Devices	72%	77%	71%	75%	79%	83%	88%	90%	71%	76%
Subscription Video On Demand	70%	74%	65%	70%	75%	78%	81%	85%	71%	75%

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

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

DIGITAL AUDIENCE MEASUREMENT

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

	INCLUDES	DOES NOT INCLUDE
Internet on a Computer	Computer measurement of web surfing	Internet Applications (Non-browser applications such as office apps, email apps, banking information, private/ incognito browsing), video streaming in web players
Social Networking on a Computer	All sites in the Member Communities subcategory as defined in the Nielsen dictionary	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 August 2020 report is based on the June RADAR studies.

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

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

DIGITAL METHODOLOGY (COMPUTER, SMARTPHONE, TABLET)

Digital data is based on Nielsen's Total Media Fusion, which is reflective of both panel and census measurement. 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.

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) 12/30/2019 – 03/29/2020 via Nielsen NPOWER/National Panel; Radio 03/28/2019 – 03/25/2020 via RADAR 145; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. Weeks included for digital – 01/06/20, 01/13/20, 01/20/20, 02/03/20, 02/10/20, 02/17/20, 03/02/20, 03/09/20, 03/16/20, 03/23/20. Digital data was produced on 06/18/20 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 July 1, 2020 via Nielsen NPOWER/National Panel.

THE NIELSEN REMOTE WORKERS CONSUMER SURVEY

The Nielsen Remote Workers Consumer Survey is a custom Nielsen study conducted in English only from June 18-25, 2020 via an online survey. It is based on a representative sample of 1,000 U.S. adults 18+ who worked from home prior to and during the coronavirus outbreak or because of the coronavirus outbreak.

STREAMING METER

Nielsen Custom Streaming Meter Usage Report, Based on a representative sample of 905 OTT Capable households from the National TV Panel, Sum of Daily Streaming Minutes, Weighted, P2+, 4/1/2019 - 6/30/2019, 03/30/20 - 06/28/20.

CUSTOM SCARBOROUGH SURVEY/TOTAL MEDIA FUSION

A custom Scarborough survey was fielded in April 2020 and was linked with the Total Media Fusion sourced from Nielsen Media Impact to understand the media behaviors of respondents who classified themselves as Traditional Work from Home workers and those working from home due to the coronavirus outbreak.

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 1 2019 for Q1 2019 and Release 2 2019 for Q1 2020). Smart speaker and voice assistant reach are based on the Nielsen MediaTech Trender.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Nielsen is divided into two business units. Nielsen Global Media provides media and advertising industries with unbiased and reliable metrics that create a shared understanding of the industry required for markets to function. Nielsen Global Connect provides consumer packaged goods manufacturers and retailers with accurate, actionable information and insights and a complete picture of the complex and changing marketplace that companies need to innovate and grow.

Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge.

An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.

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