

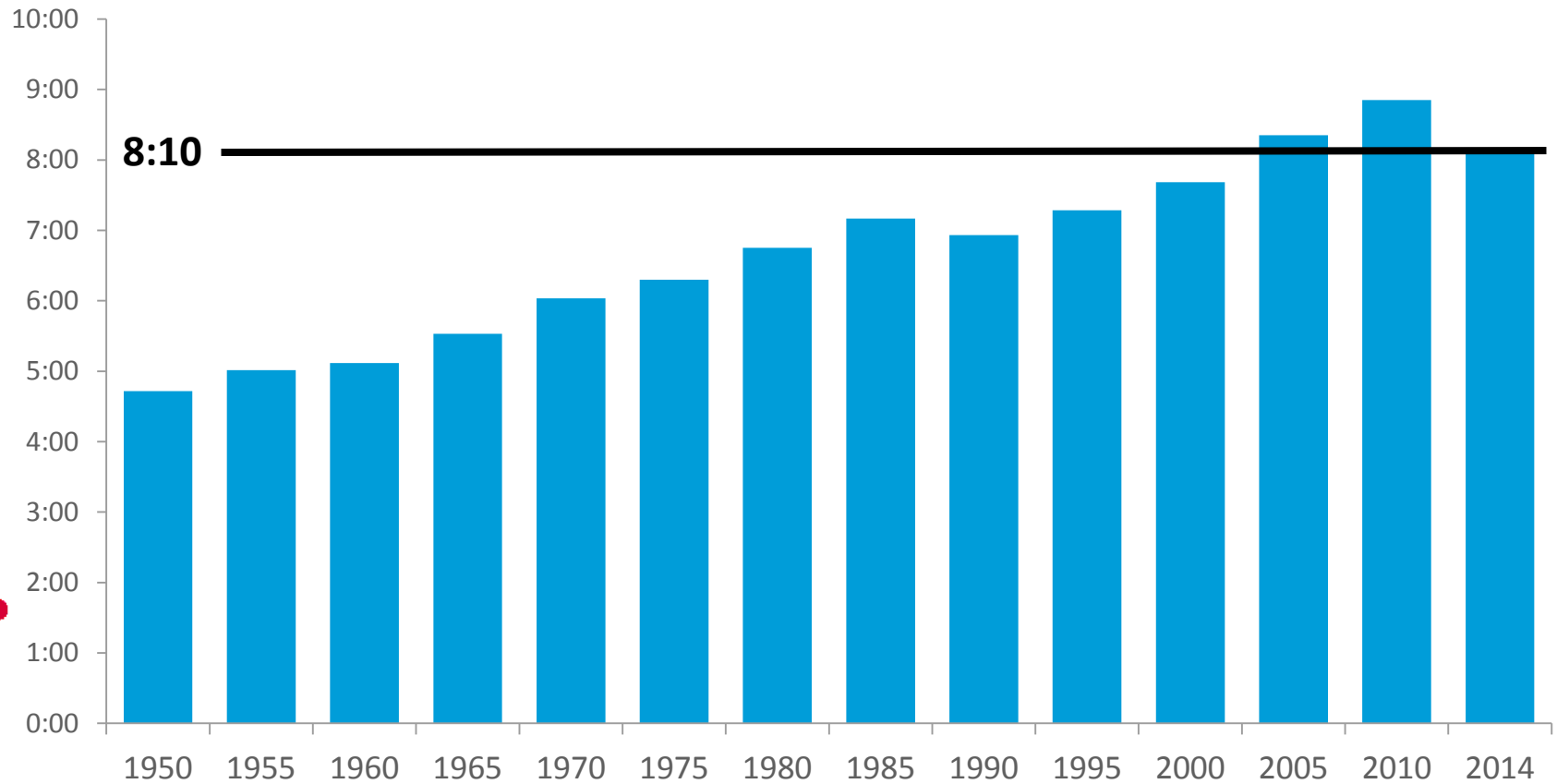
An abstract graphic on the right side of the page. It features a series of curved, overlapping lines in various colors (blue, green, yellow, red, purple) that create a sense of depth and movement, resembling a funnel or a cone. Several small dots in the same color palette are scattered across the lines.

Research
INSIGHTS

MEDIA TRENDS AND INSIGHTS

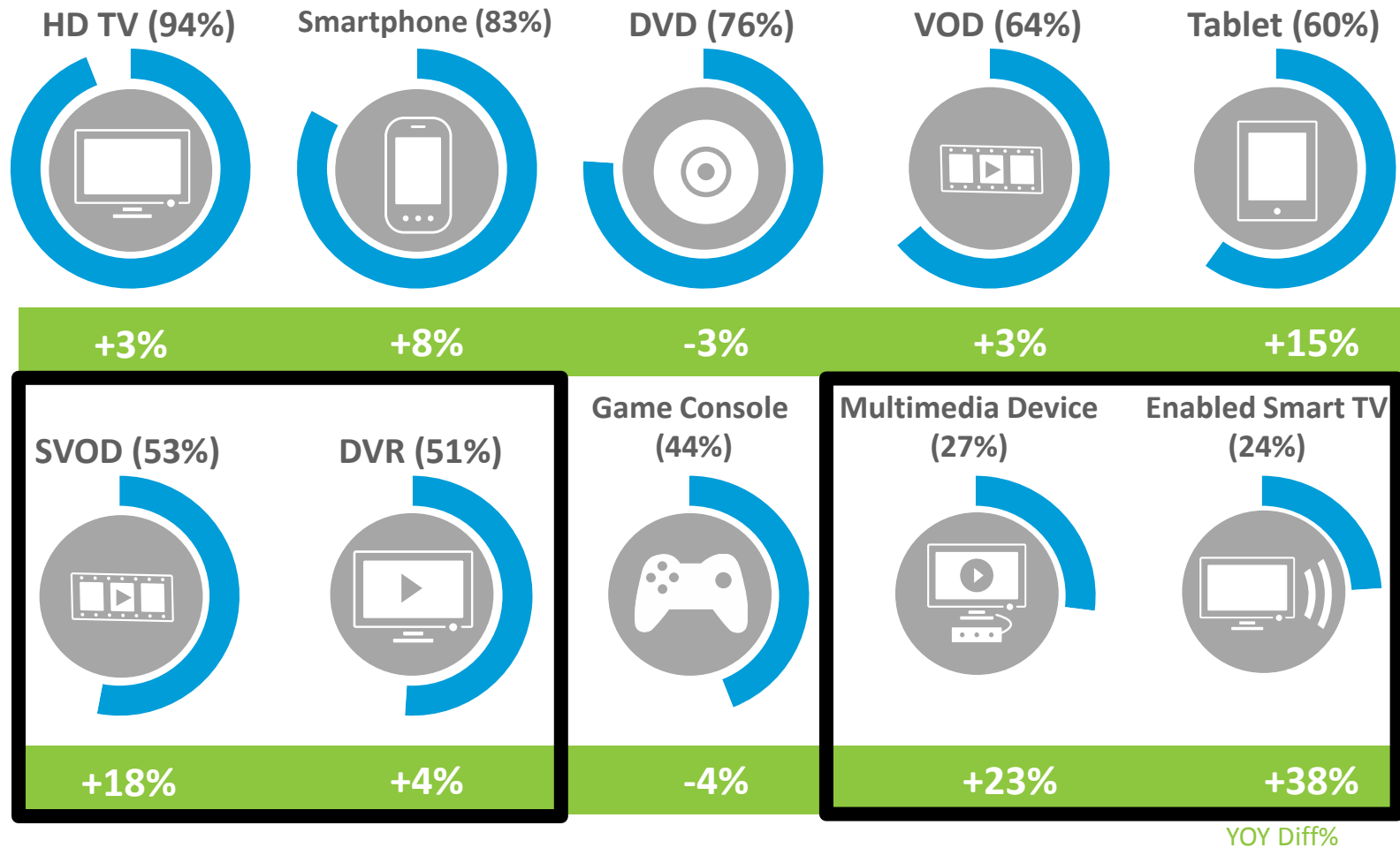
TV VIEWING REMAINS NEAR HISTORIC HIGH LEVELS

Average Daily HH Viewing (h:mm)



CHOICE BEING DRIVEN BY TECHNOLOGY/SERVICES

Penetration in Q2 2016 and change from Q2 2015



NOT ALL DEVICES SHOWING GROWTH

Devices Generally
Not Connected to
Internet

DVR

DVD

*...showing less usage
or lower growth*

Devices Enabling
Video Streaming
Over the Internet

Videogame Consoles

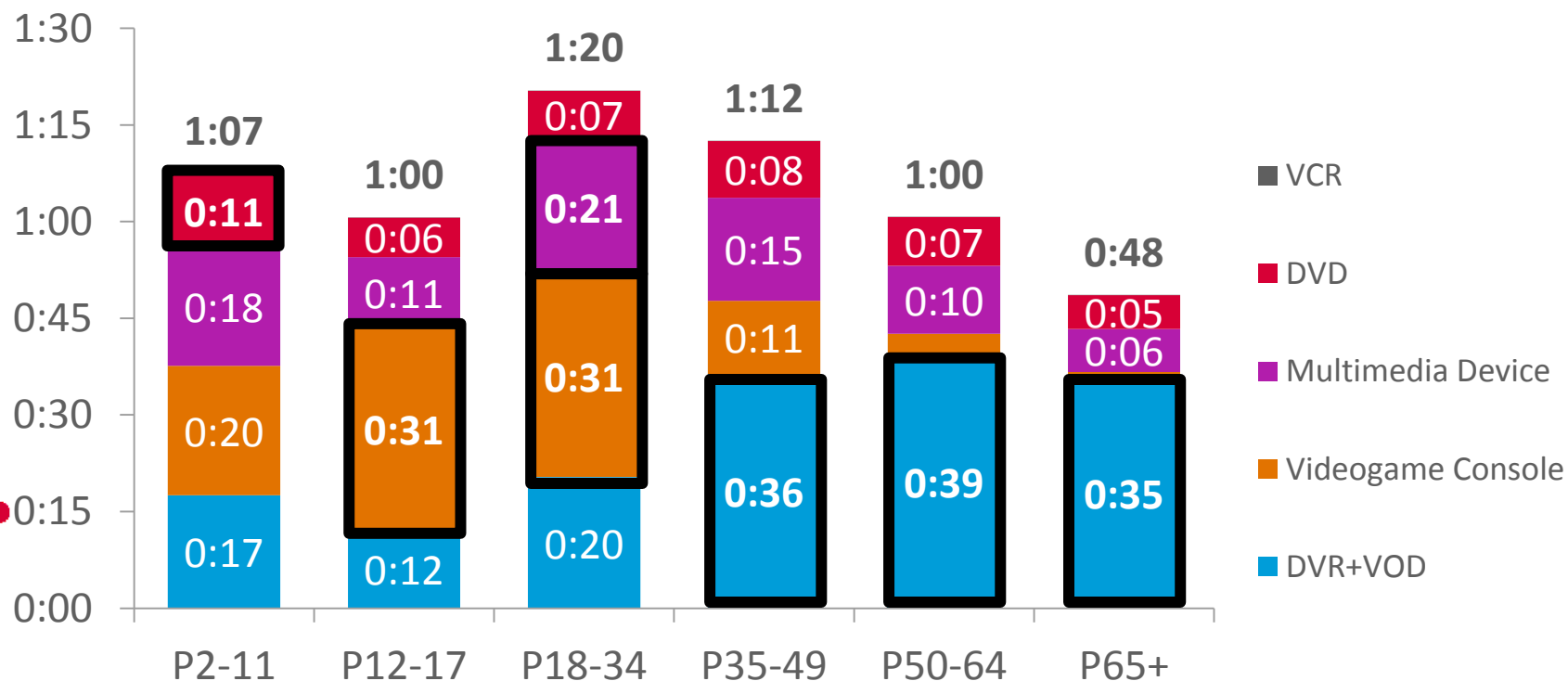
Multimedia Devices

*...showing greater
time spent using*

DEVICE USAGE DIFFERS BY AGE GROUP

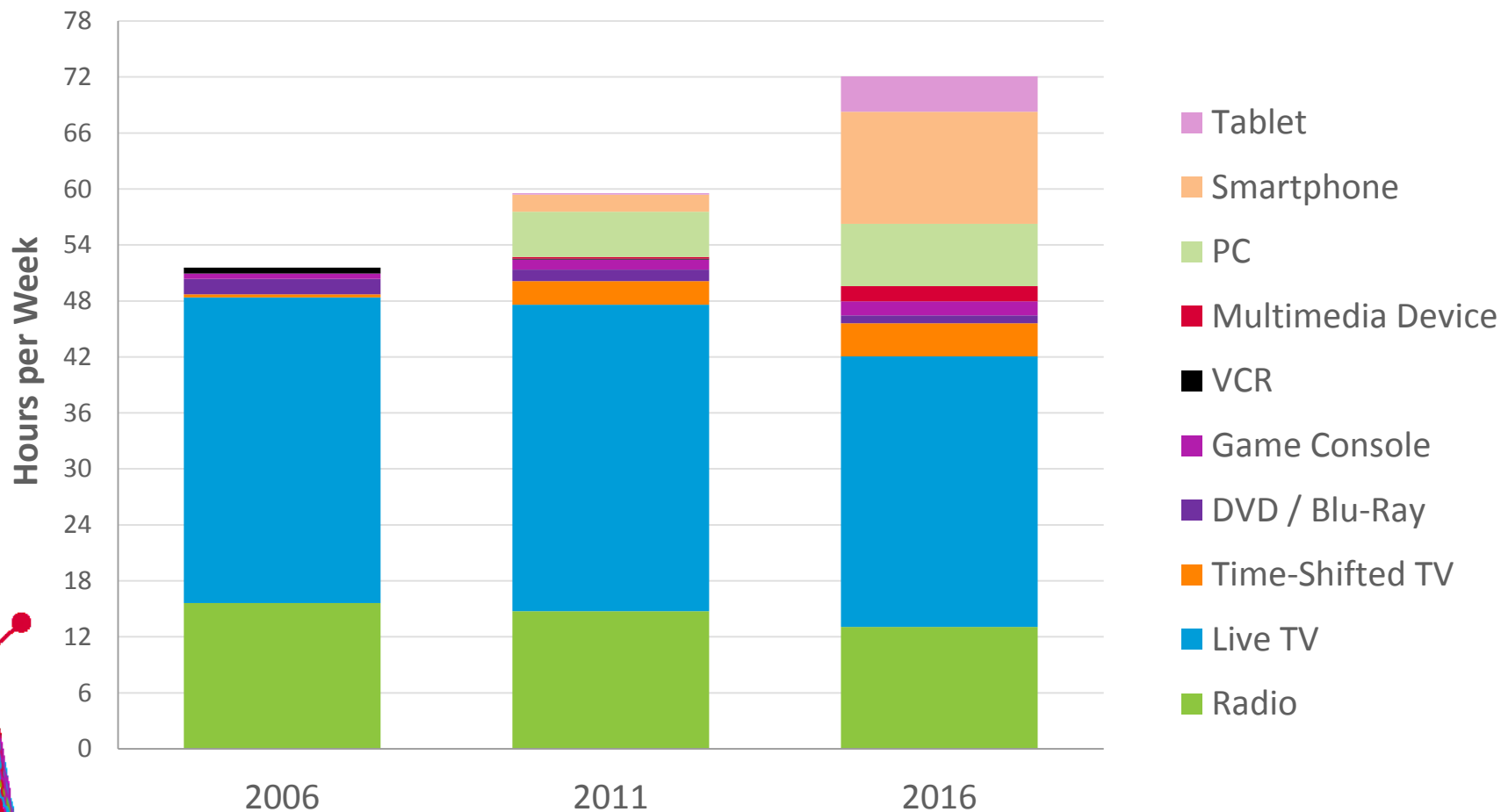
Younger demos using more devices

TV-Connected Device Usage (h:mm/Day) May 2016



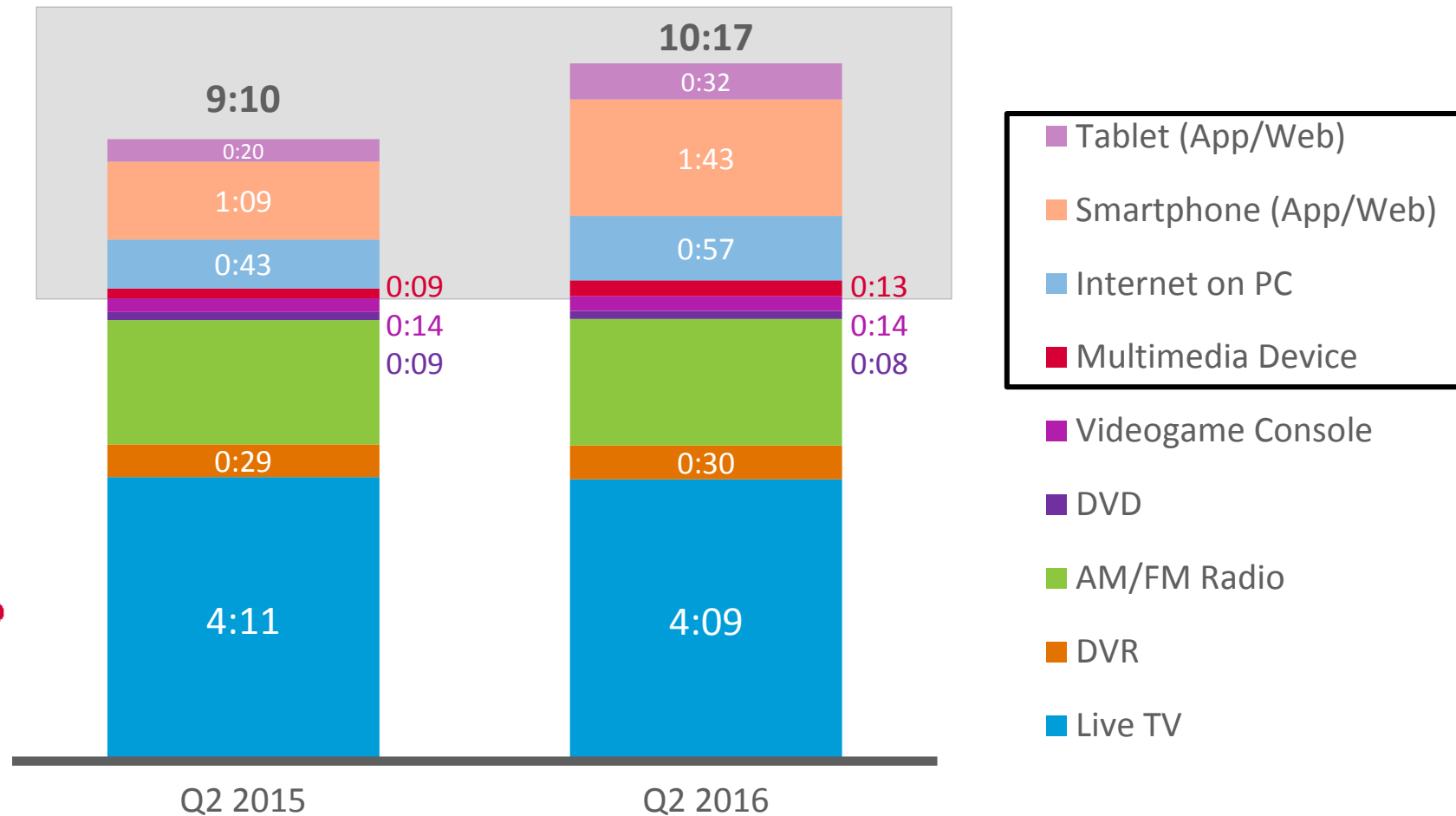
THERE ARE MORE MEDIA OPTIONS FILLING UP A CONSUMER'S DAY

Weekly Time Spent in the Total US Population – Based on Qtr 2, P18+



CHANGING MEDIA USAGE

Average Time Spent per Adult per Day

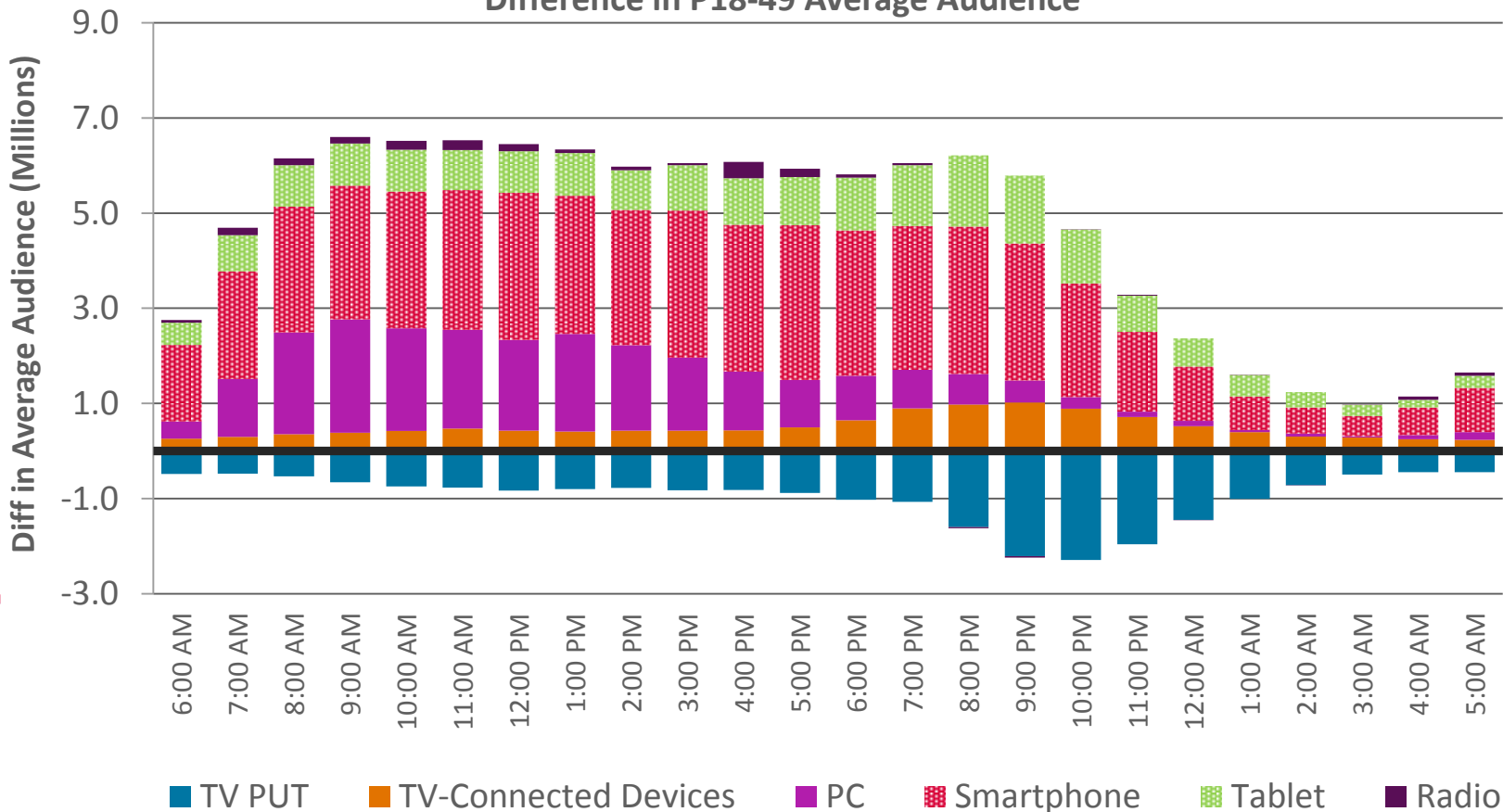


Source: Nielsen Total Audience Report Q2 2016

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DECREASE IN TV VIEWING PART OF A LARGER TREND

Nov14/Feb15/May15 to Nov15/Feb16/May16
Difference in P18-49 Average Audience



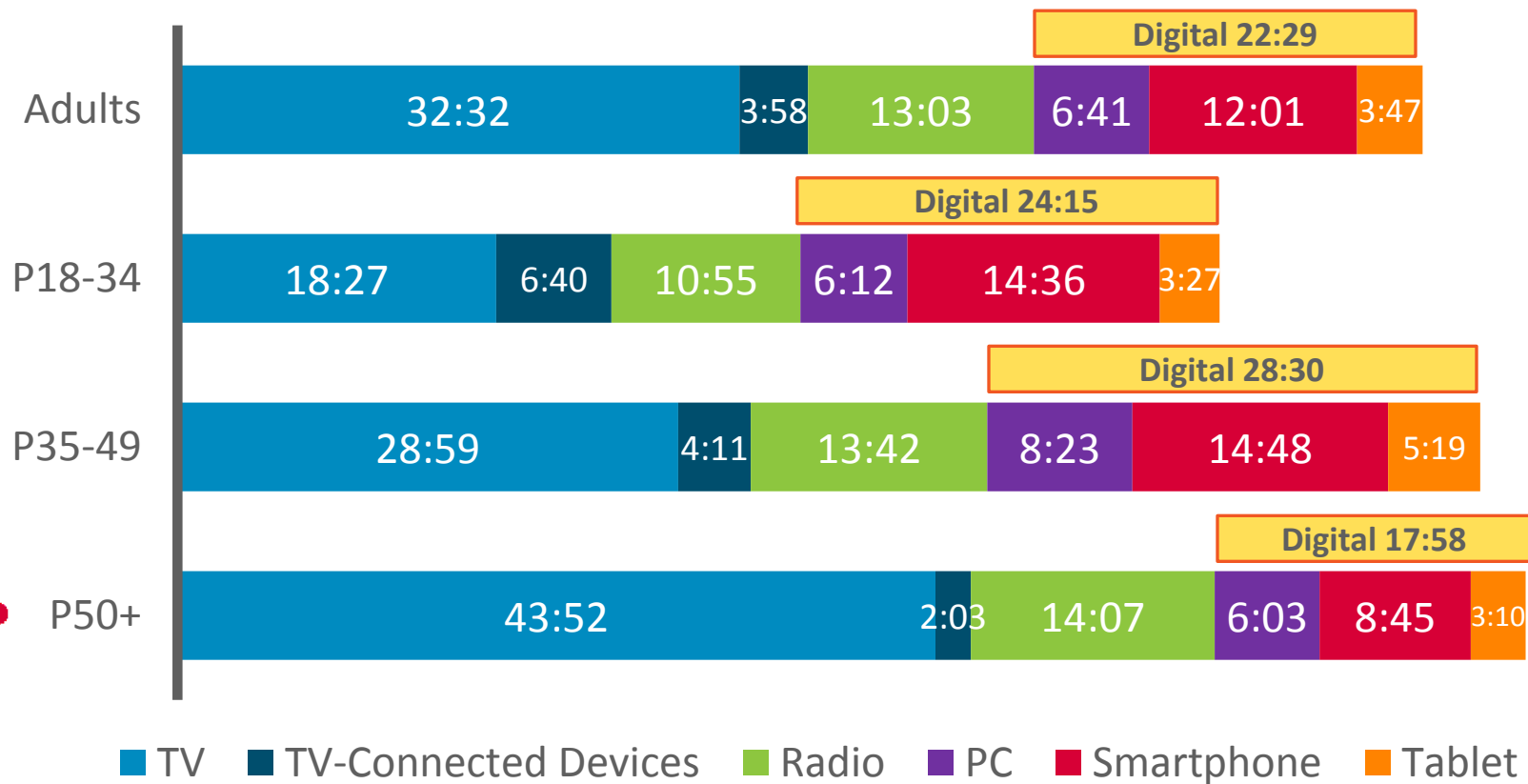
Source: Nielsen NPOWER, Netview, EMM, NRD – FA15, FA14

TV-Connected Devices = DVD, Game Console, Multimedia Device, VCR

TV data for 2015 based on NPM Panel, 2016 based on National Panel. Crediting rules were updated in March 2016 for Mobile.

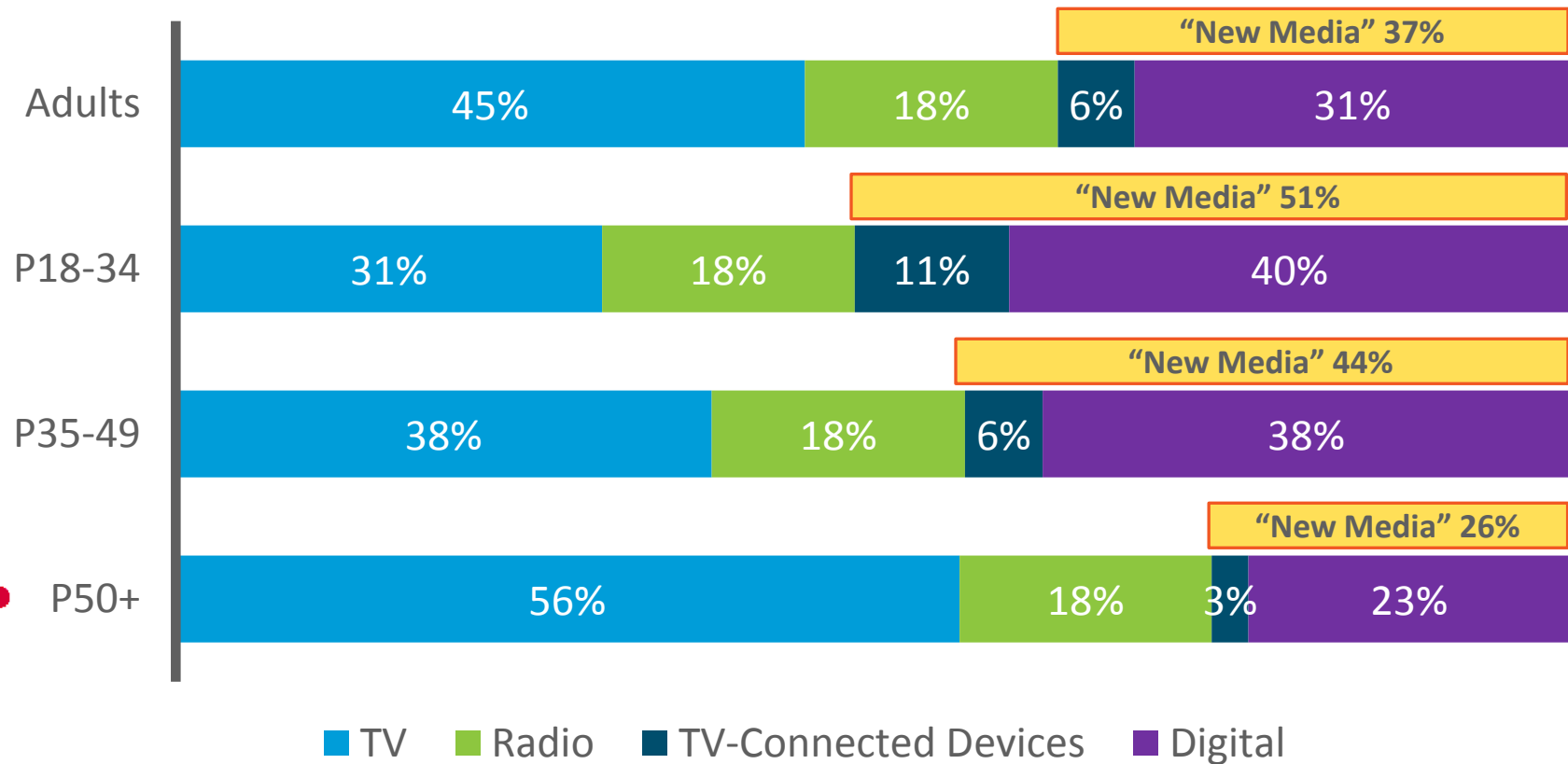
DIGITAL USAGE VARIES BY DEMO

Highest usage among Persons aged 35-49, not Persons aged 18-34



DIGITAL USAGE VARIES BY DEMO

Persons 18-34 use twice the proportion of “new media” compared to P50+

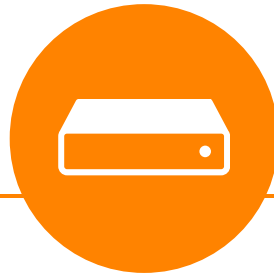


NIELSEN'S TOTAL CONTENT RATINGS MEASUREMENT

DATA INCLUDED IN TOTAL CONTENT RATINGS



**Live+ 7
Linear
Ratings**



**Television
viewing
from
DVRs**
Days 8-35



**VOD, SVOD
and other
OTT content
hitting the TV
screen**



**Digital
content on
mobile
devices and
computers**