

# LOCAL TV LANDSCAPE REPORT

TELEVISION USAGE AND TECHNOLOGY  
ANALYSIS

NOVEMBER 2014 SWEEP

nielsen  
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# FOREWORD

These days, Traditional TV has some stiff competition. With device adoption soaring, we find ourselves living in a new era of media consumption.

Today's viewing audience is consuming content in new and different ways. This evolving behavior raises many questions and uncertainties. In an effort to keep you informed of local trends, we've highlighted a few of the viewing shifts we're seeing across markets.

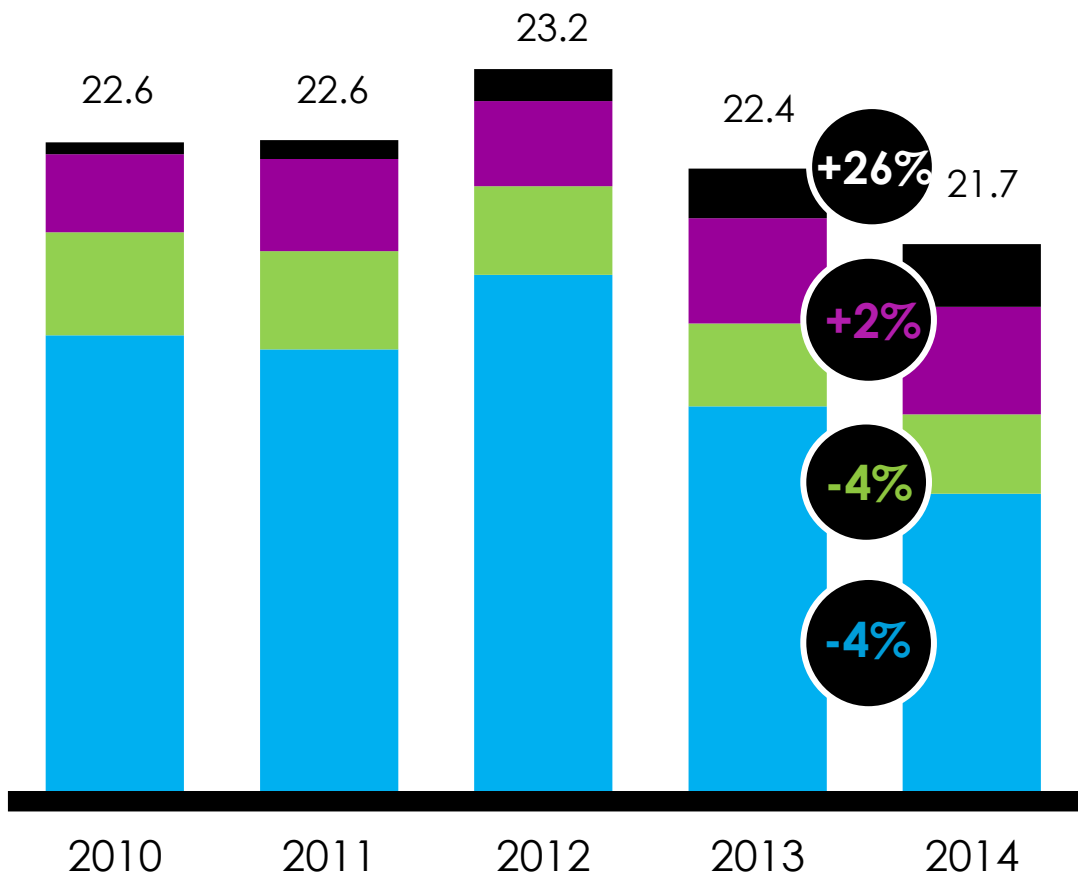
From East to West, high-tech and low-tech, this report keeps a pulse on all market types and the changes we're seeing in overall television consumption.

We hope this report sheds some light on your market and how it stacks up to the rest.

# OVERALL USAGE TRENDS SHOW TWO YEAR DECLINE ACROSS LPM MARKETS

LPM WEIGHTED AVERAGE | P25-54 | TOTAL DAY

■ Over-the-Top ■ Video Games ■ DVD ■ Live PUT + Time-Shifting



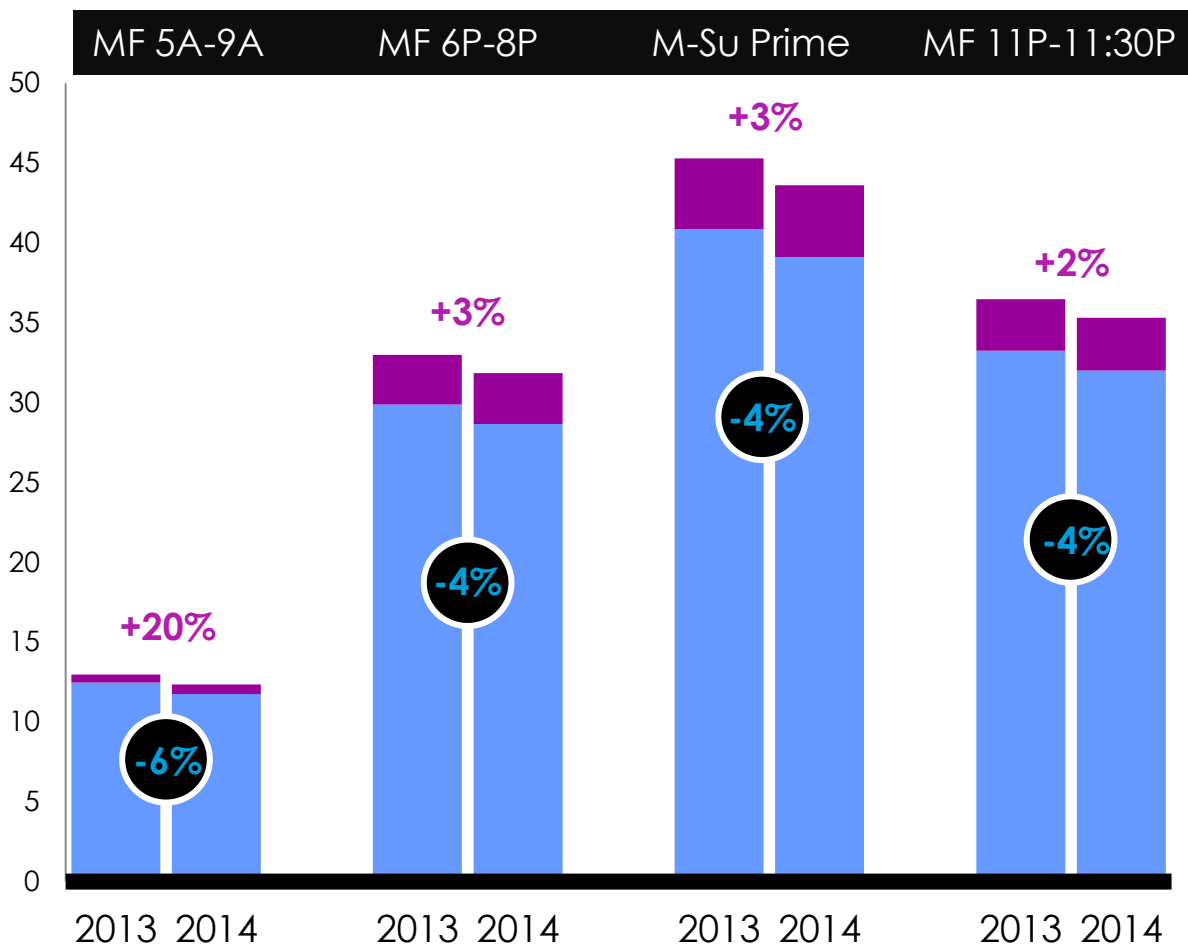
While overall usage was down this November for Total Day, Over-the-Top Streaming and Videogames saw increases

# AMONG LPM MARKETS, NON-HUT SOURCES GAINED AND PUTS DROPPED ACROSS ALL DAYPARTS



LPM WEIGHTED AVERAGE | PERSONS 25-54

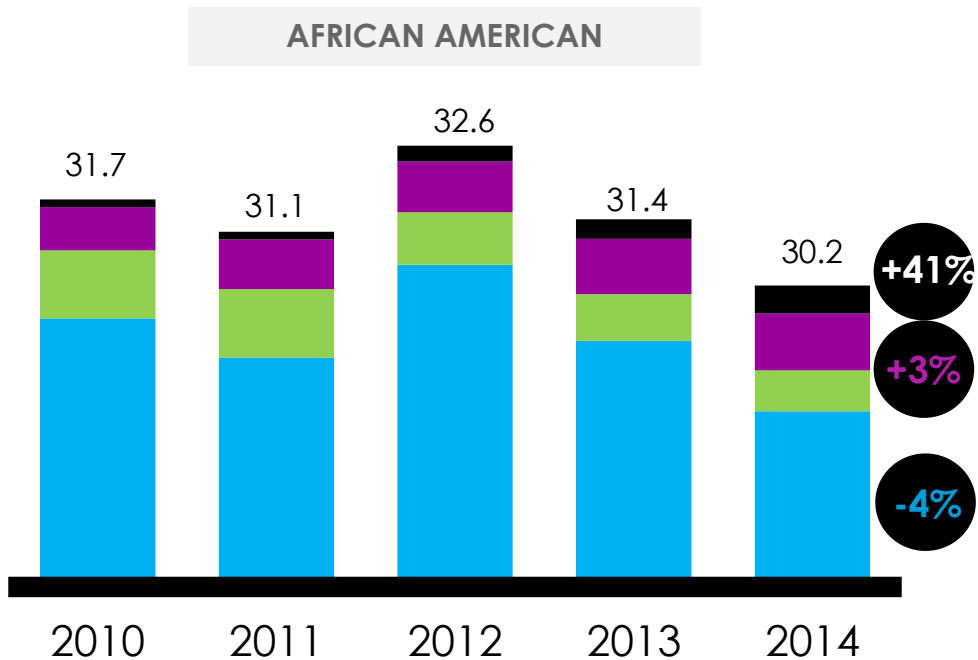
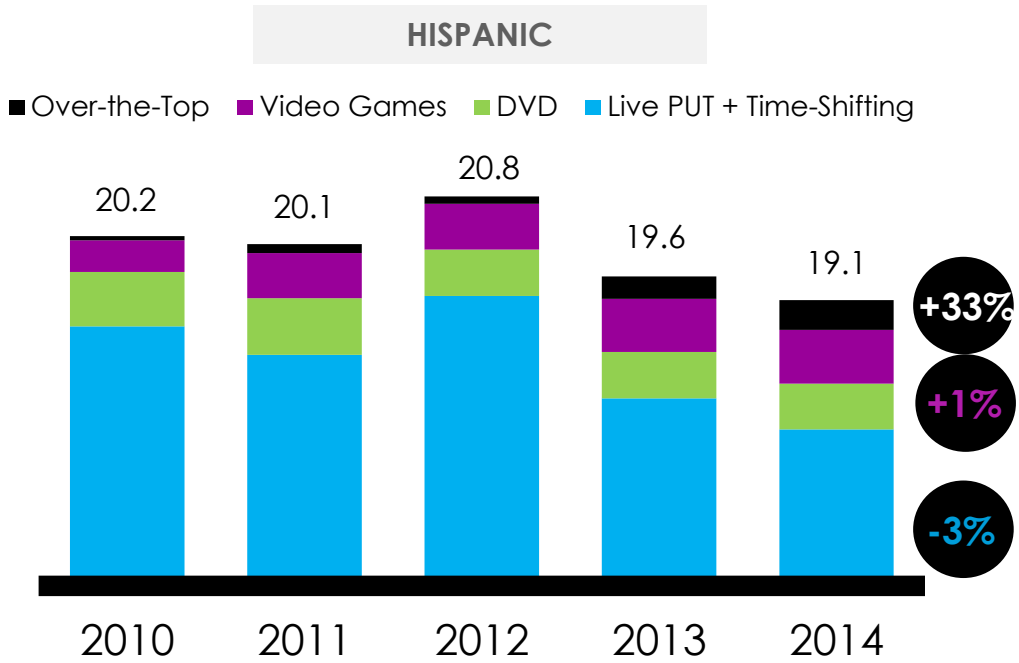
■ Non-HUT      ■ Live PUT + Timeshifting



Most dayparts experienced similar shifts to Total Day, showing slight YOY declines to Live PUT, and increases to Non-HUT sources

# ETHNIC BREAKS ALSO SHOW DECLINES IN OVERALL USAGE

LPM WEIGHTED AVERAGE | PERSONS 25-54 | TOTAL DAY

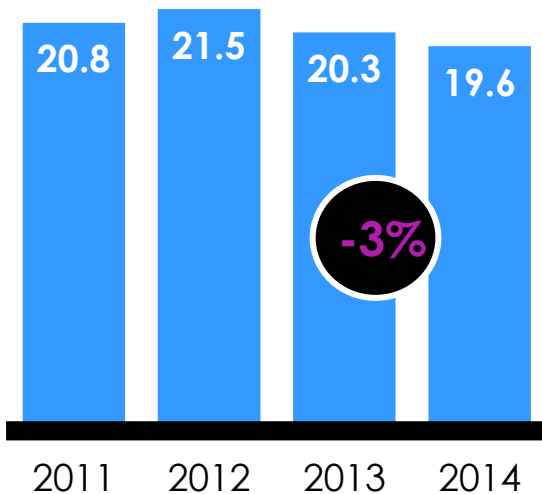


\*Based on Live Data Stream

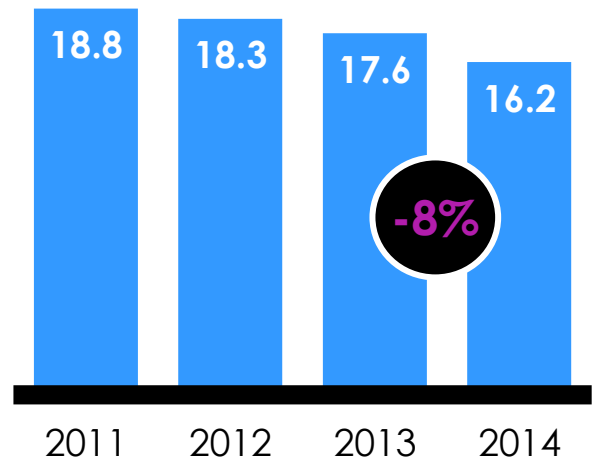
# ALL MARKET TYPES SAW A DECLINE IN TOTAL DAY PUTS, WITH SET METER SHOWING THE BIGGEST DROP

## WEIGHTED AVERAGE PUT RATINGS BY MARKET TYPE | TOTAL DAY

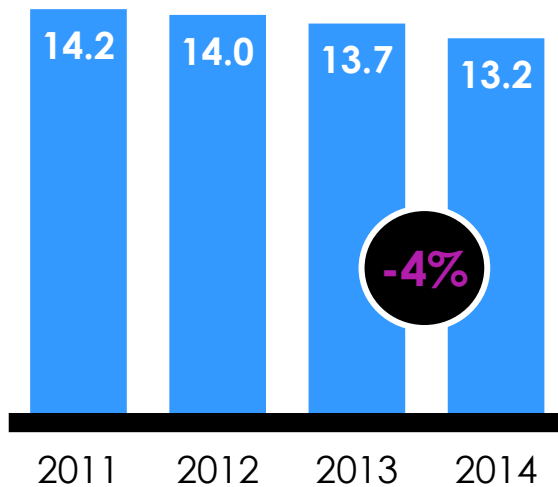
### LPM MARKETS



### MM MARKETS



### DIARY MARKETS



Despite the 3% drop among LPM markets, half a dozen reported PUT increases this year (Minneapolis, Atlanta, Miami, Tampa, Portland and Denver)

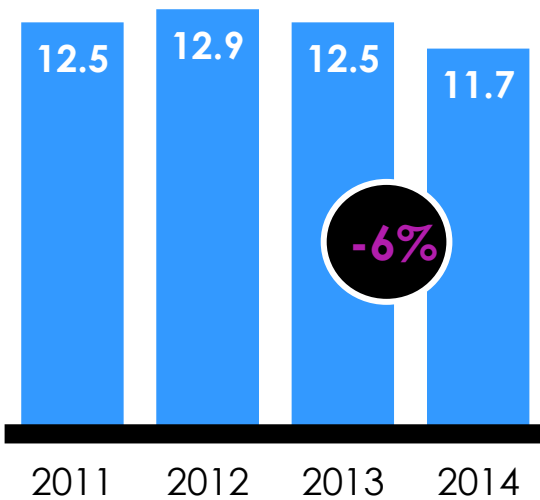
Based on Persons 25-54, November sweep periods 2011 – 2014, Total Day M-Su 5A-5A

\*LPM based on Live Data Stream, MM Live+SD, Diary Live+24 hours

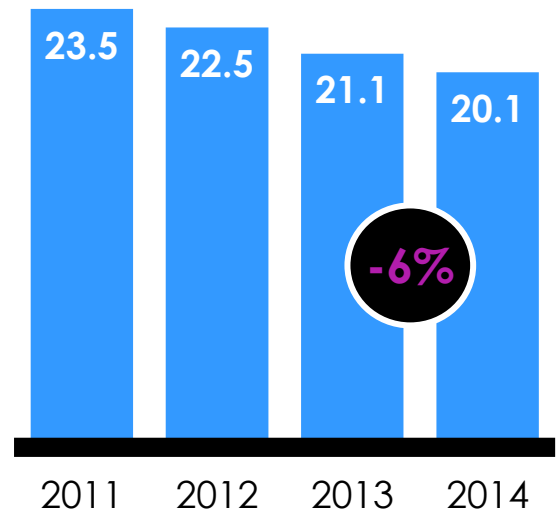
# DURING EARLY NEWS, DIARY MARKETS HAVE REMAINED STABLE OVER THE PAST THREE YEARS

## WEIGHTED AVERAGE PUT RATINGS BY MARKET TYPE | MF 5A-9A

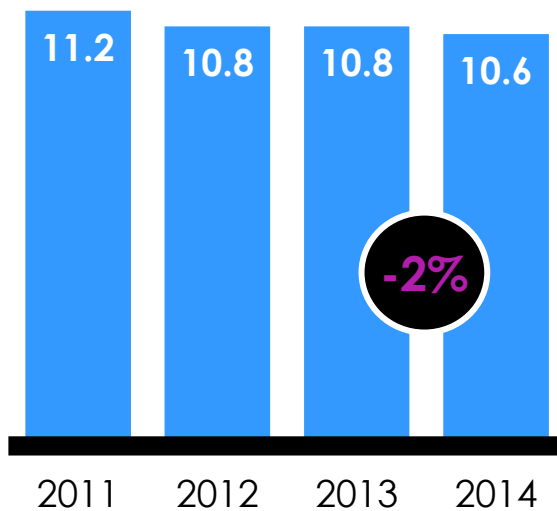
### LPM MARKETS



### MM MARKETS



### DIARY MARKETS



Several Set Meter markets posted YOY PUT increases for early news, with the largest gains in Greensboro, Ft. Myers and Buffalo

Based on Persons 25-54, November sweep periods 2011 – 2014, MF 5A-9A

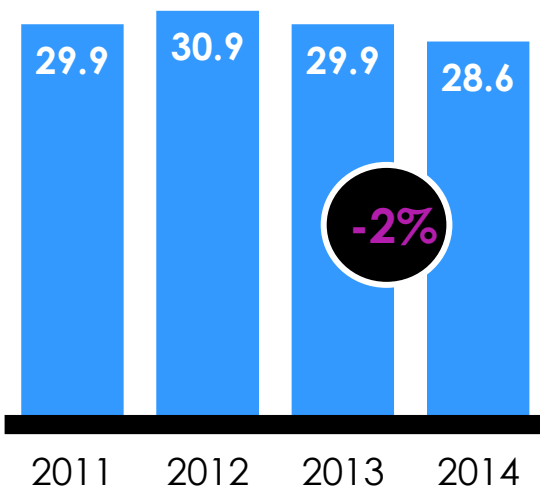
\*LPM based on Live Data Stream, MM Live+SD, Diary Live+24 hours

# SET METER MARKETS SAW THE MOST NOTABLE DECLINE DURING EARLY FRINGE

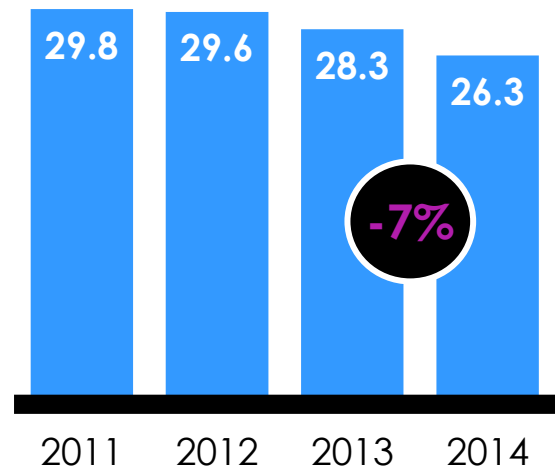


## WEIGHTED AVERAGE PUT RATINGS BY MARKET TYPE | MF 6P-8P

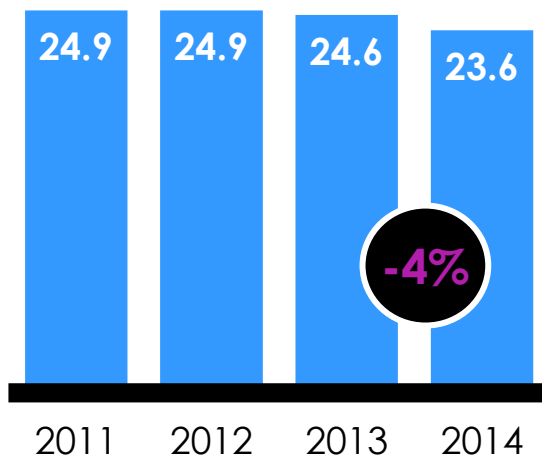
### LPM MARKETS



### MM MARKETS



### DIARY MARKETS



Diary markets with the biggest YOY PUT swings for early fringe were Bluefield (+23%) and Topeka (-19%)

Based on Persons 25-54, November sweep periods 2011 – 2014, MF 6P-8P

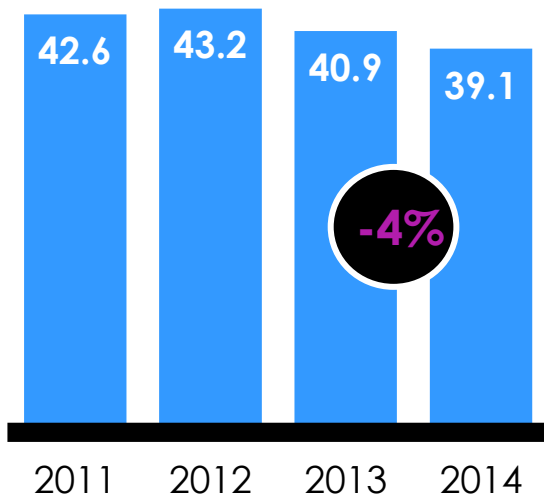
\*LPM based on Live Data Stream, MM Live+SD, Diary Live+24 hours



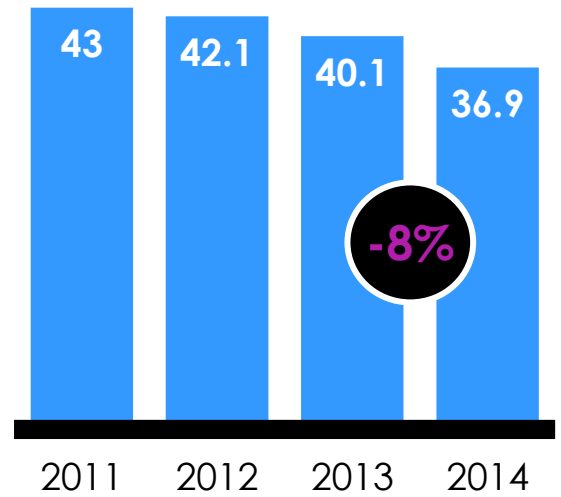
# PRIMETIME VIEWING WAS DOWN ACROSS ALL MARKET TYPES, WITH SET METER SHOWING THE LARGEST DECLINE

## WEIGHTED AVERAGE PUT RATINGS BY MARKET TYPE | M-SU PRIME TO 11P

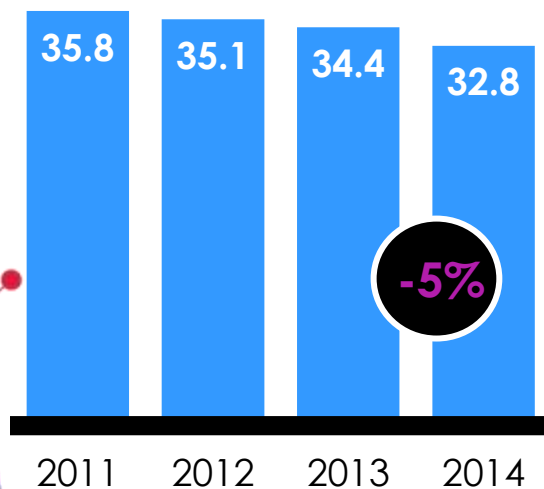
### LPM MARKETS



### MM MARKETS



### DIARY MARKETS



Since November 2011, Over-the-Top Streaming has grown by 200% (0.2 Rating to 0.6) among LPM markets during Prime

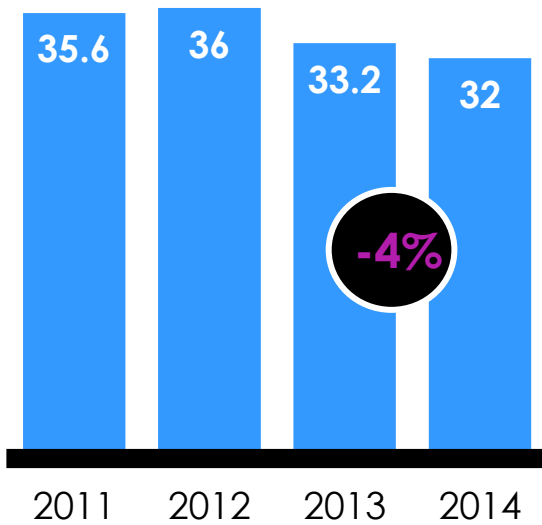
Based on Persons 25-54, November sweep periods 2011 – 2014, M-Su Prime to 11P

\*LPM based on Live Data Stream, MM Live+SD, Diary Live+24 hours

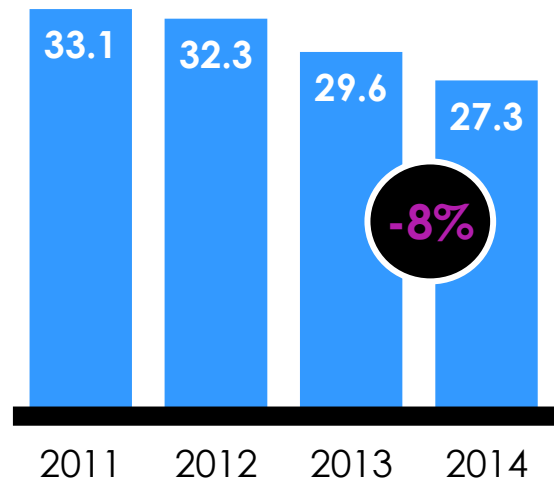
# SET METER MARKETS ALSO AVERAGED THE LARGEST DECLINE DURING LATE NEWS, FOLLOWED BY DIARY MARKETS

## WEIGHTED AVERAGE PUT RATINGS BY MARKET TYPE | MF 11P-11:30P

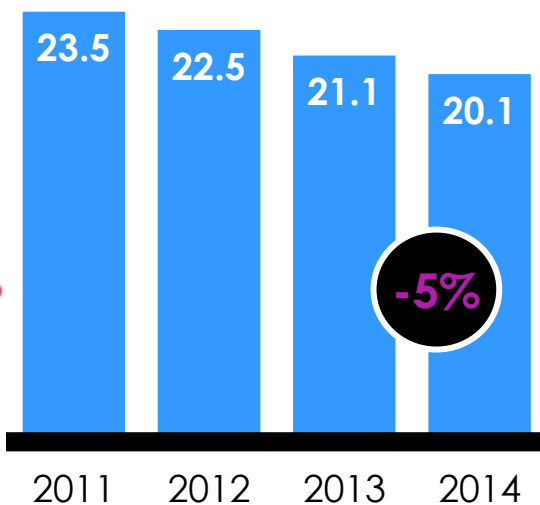
### LPM MARKETS



### MM MARKETS



### DIARY MARKETS



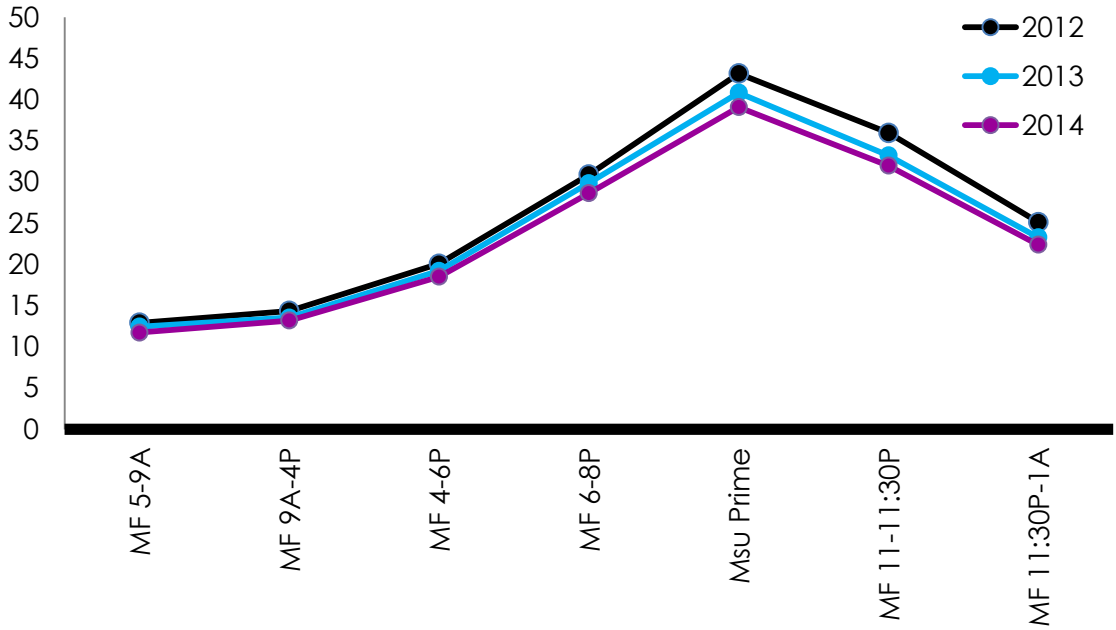
Among Set Meter markets, Knoxville saw a 9% increase in late news TV usage, while Oklahoma City dropped 17% compared to prior year

Based on Persons 25-54, November sweep periods 2011-2014, MF 11P-11:30P

\*LPM based on Live Data Stream, MM Live+SD, Diary Live+24 hours

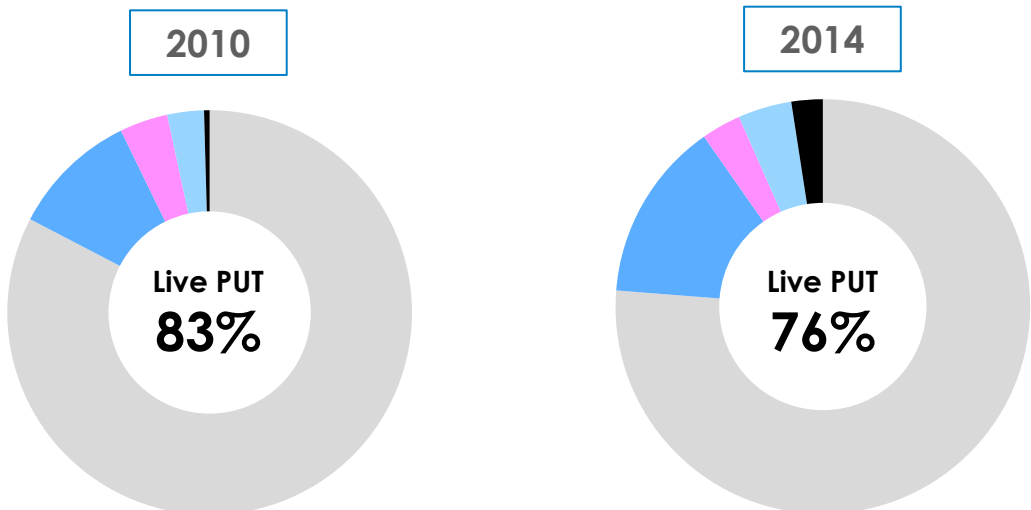
# VIEWING ON THE TV GLASS IS GRADUALLY DECLINING, BUT STILL PROVES TO BE THE PREFERRED PLATFORM

## LIVE PUT + WATCHING TMESHIFTED TV – YOY DAYPART BREAKOUT



## PERCENT DISTRIBUTION OF TOTAL USAGE RATINGS

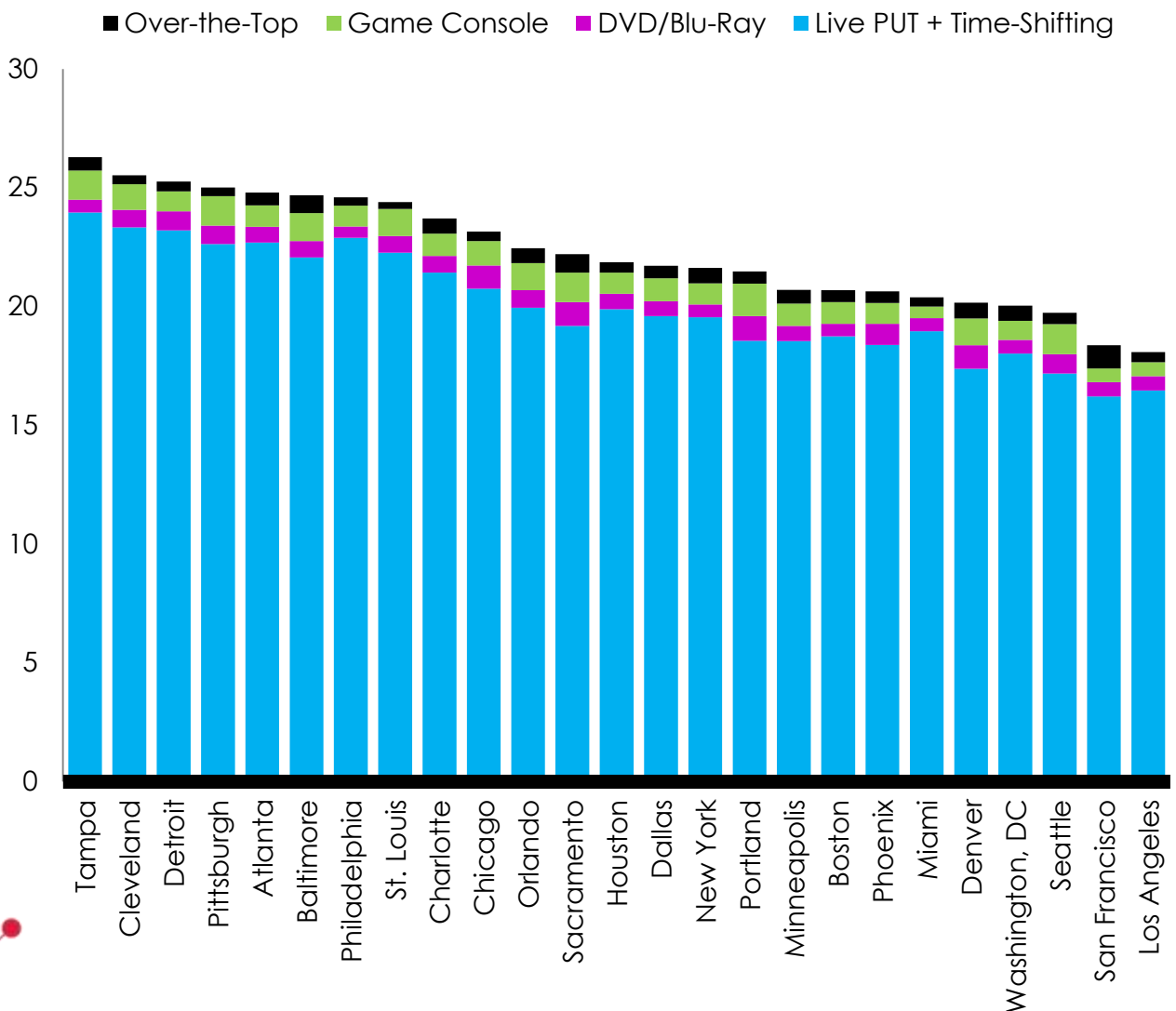
Legend: Live PUT (Grey), Time-Shifting (Blue), DVD/Blu-Ray (Pink), Video Game (Light Blue), Over-the-Top (Black)



\*Based on Persons 25-54, LPM Weighted Average, November 2014, Total Day M-Su 5A-5A, Live Data Stream

# TAMPA AND CLEVELAND WERE THE HIGHEST OVERALL TV USAGE LPM MARKETS THIS NOVEMBER

TOTAL DAY | PERSONS 25-54 | NOVEMBER 2014

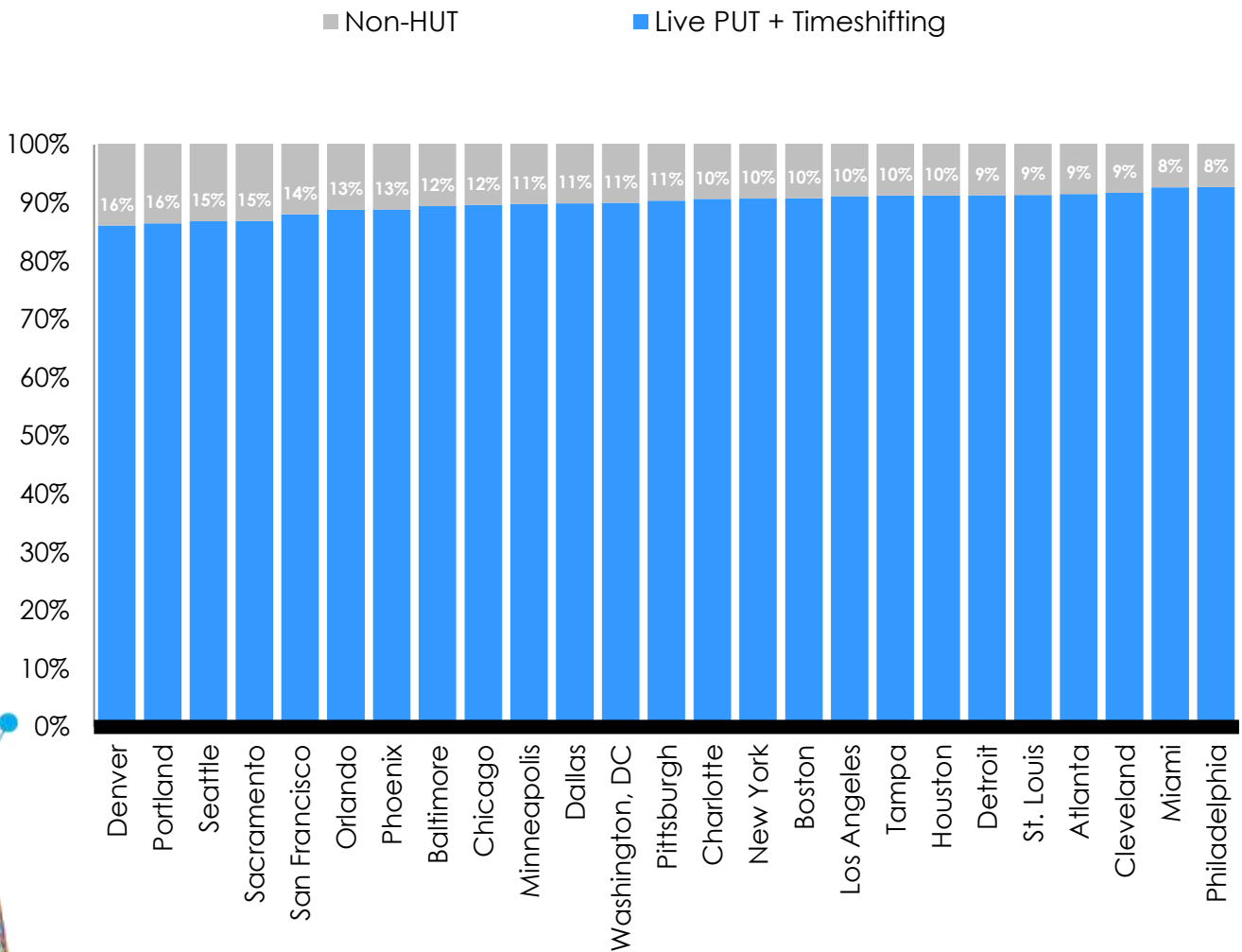


West coast markets (San Francisco, Los Angeles and Seattle) ranked as the lowest LPM viewing markets

# NON-HUT USAGE COMPRISES 8-16% OF TOTAL USAGE ACROSS THE LPM MARKETS



## PERCENTAGE OF RATING CONTRIBUTION TO OVERALL USAGE



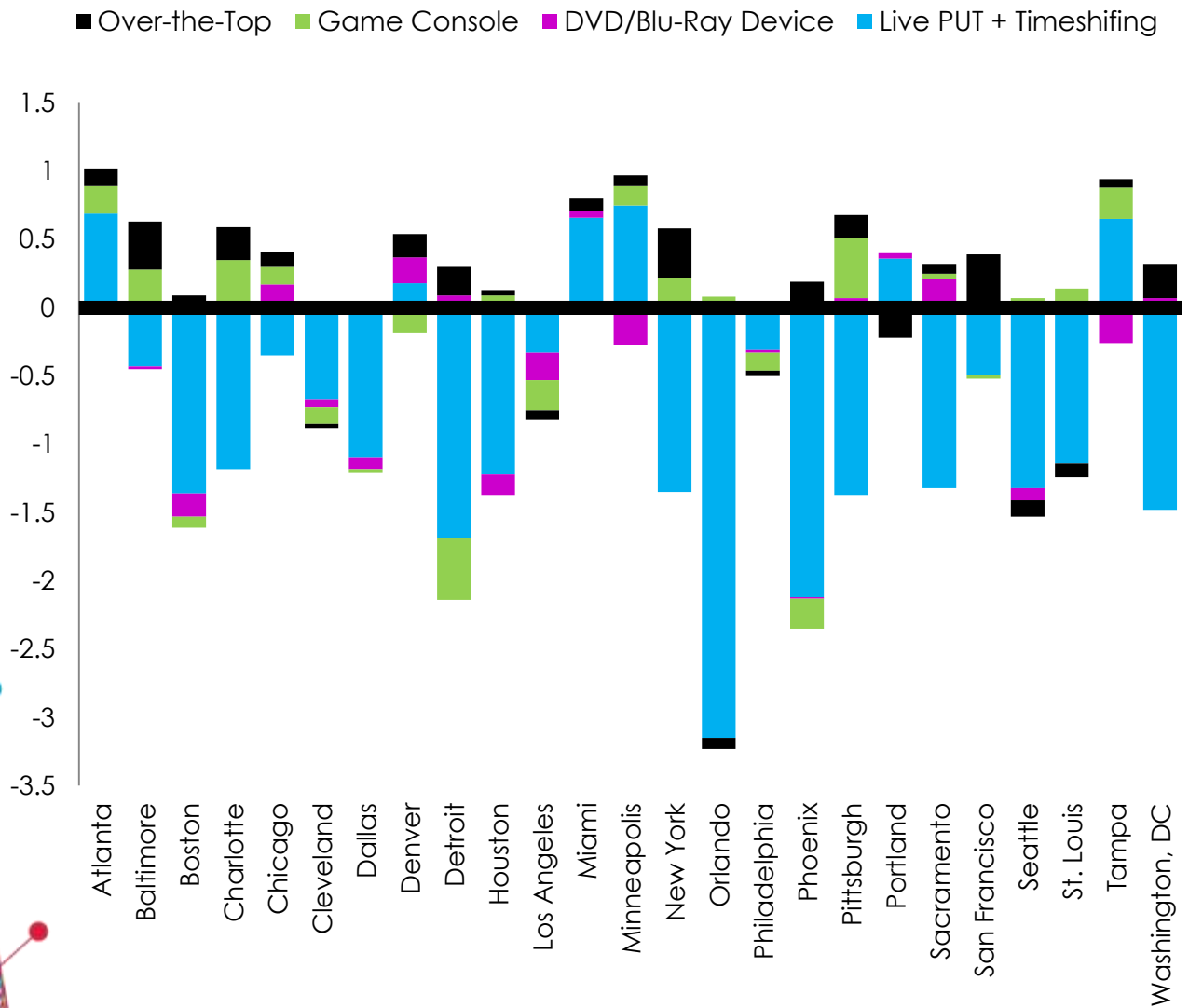
Denver, one of the lowest PUT markets, saw the greatest increase in overall usage come from Non-HUT sources

\*Based on Persons 25-54, November 2014, Total Day M-Sun 5A-5A; Live Data Stream

Non-HUT includes ratings to Over-the-Top streaming, DVD and Video Games

# ORLANDO, PHOENIX AND DETROIT SAW THE LARGEST YOY DECLINES IN TV USAGE AMONG LPM MARKETS

YOY RATING CHANGE | NOVEMBER 2013 VS 2014

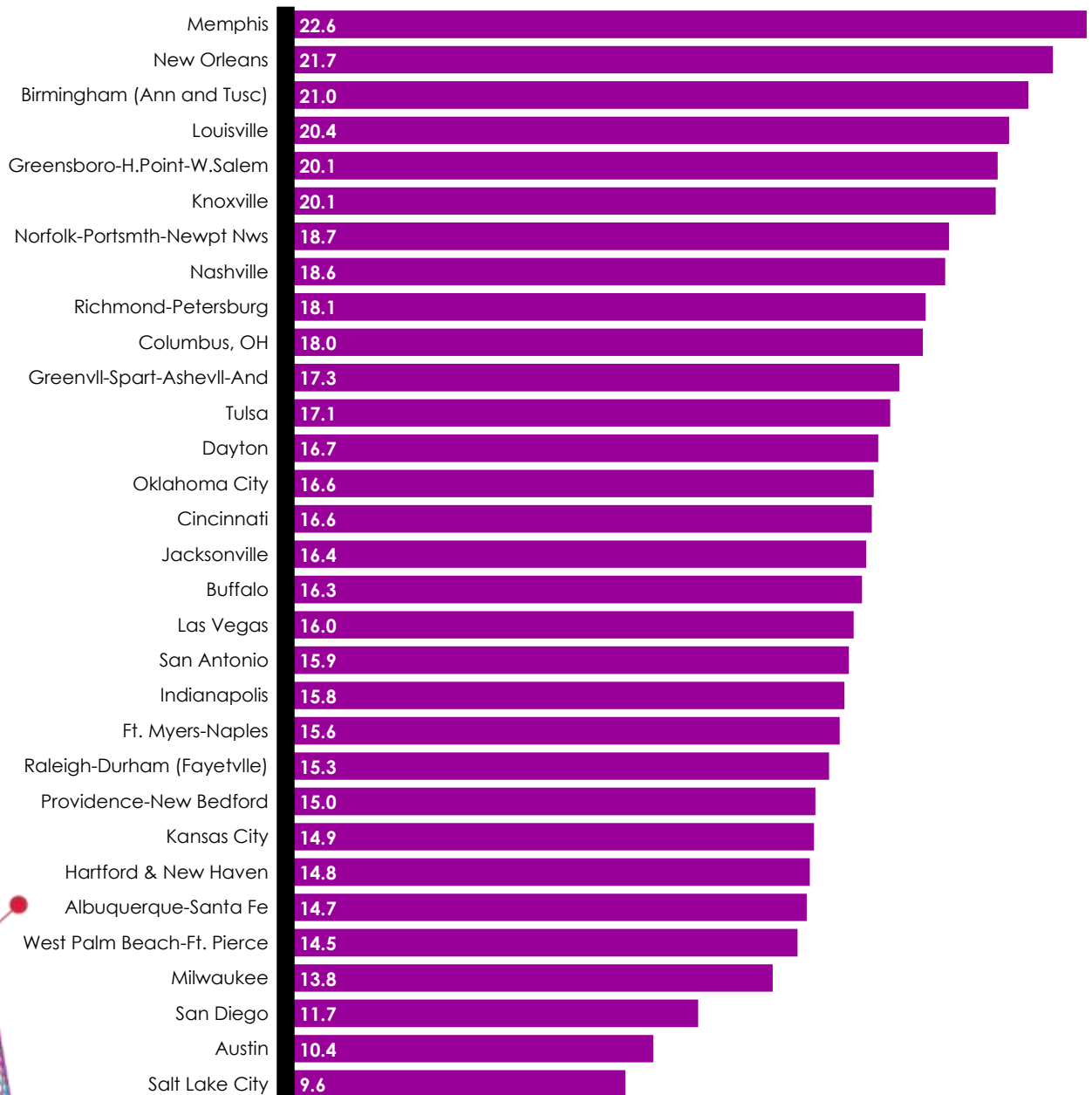


19 of the 25 LPM Markets experienced year-over-year declines this November versus last.

\*Based on Persons 25-54, November 2014, Total Day M-Sun 5A-5A; Live Data Stream

# AMONG SET-METER, SOUTH CENTRAL MARKETS RANK HIGHEST IN TV VIEWING

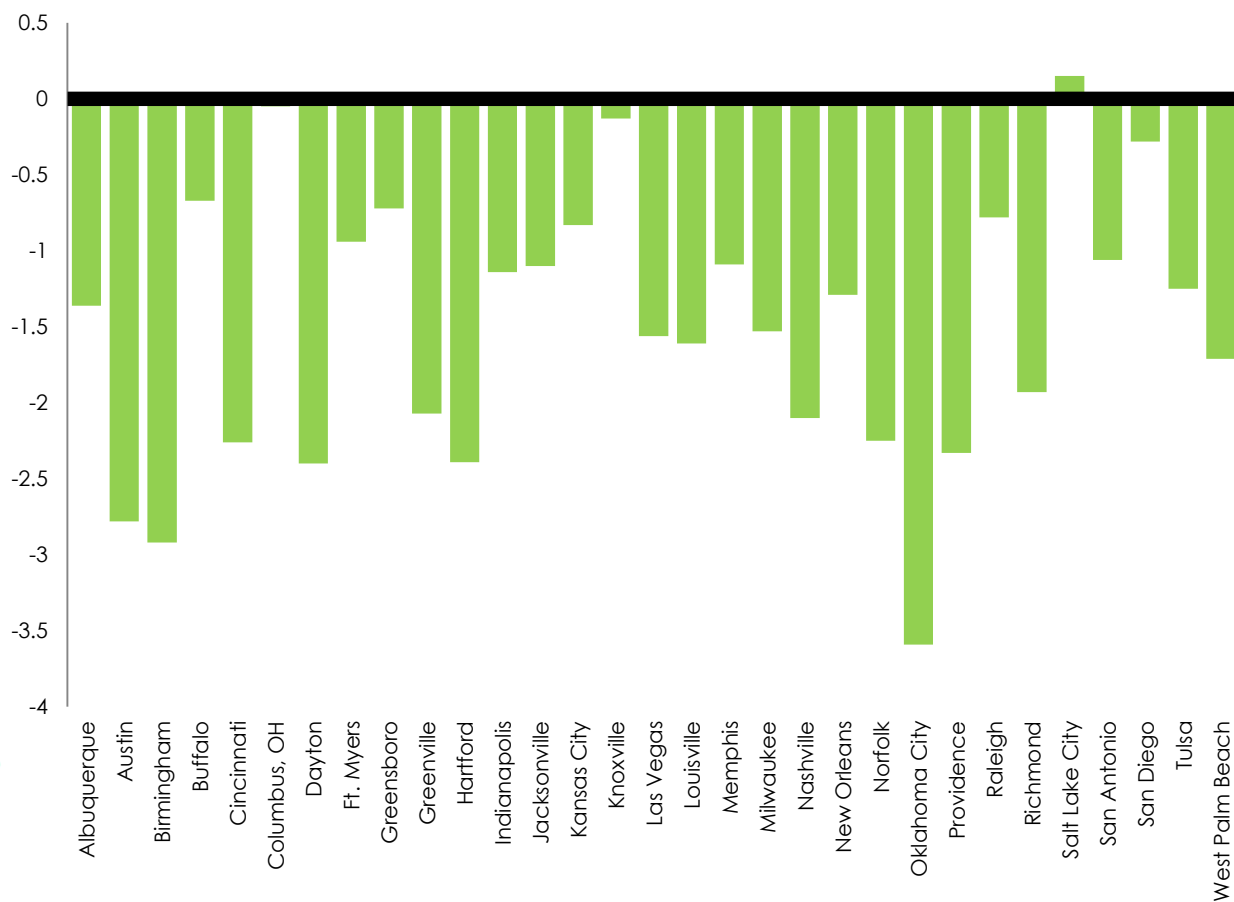
TOTAL DAY PUT | PERSONS 25-54 | NOVEMBER 2014



\*Based on Persons 25-54, November 2014, Total Day M-Sun 5A-5A; Live+SD data stream

# AMONG SET METER, OKLAHOMA CITY, BIRMINGHAM AND AUSTIN REPORTED THE LARGEST TV USAGE DECLINES

## YOY PUT RATING CHANGE | NOVEMBER 2013 VS 2014



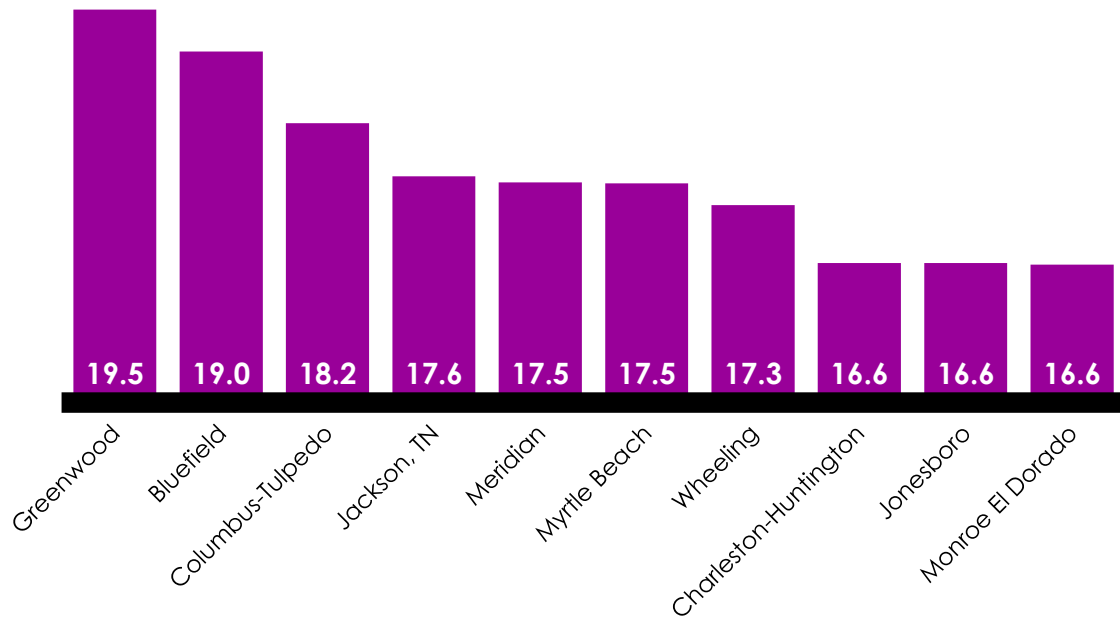
**Salt Lake City** was the only Set-Meter market showing an increase in TV Usage among Persons 25-54.

On Average, Total Day TV usage among MM markets fell 8% compared to last year, and is down 14% since 2011.

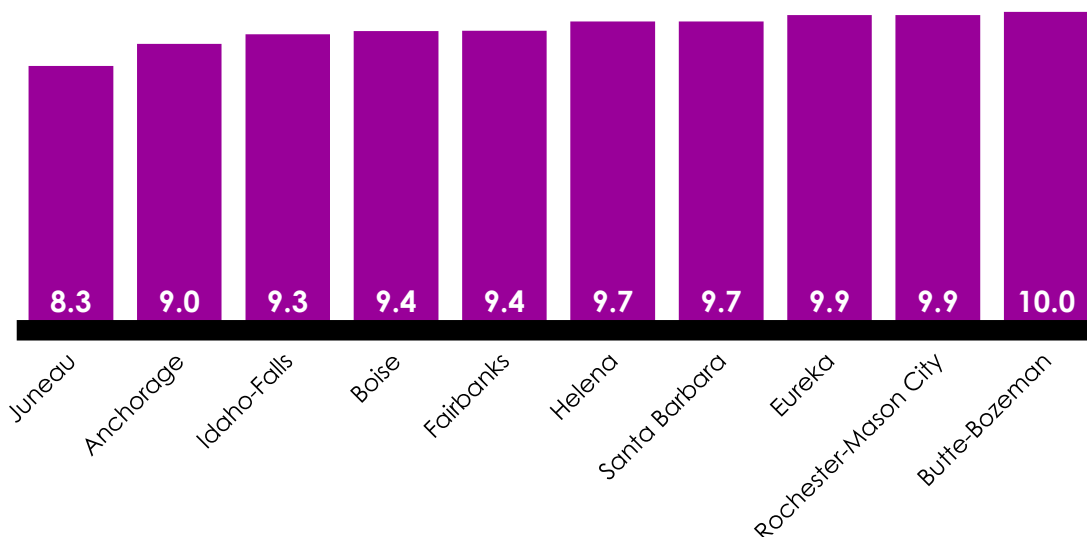


# GREENWOOD-GREENVILLE HAD THE GREATEST USAGE AMONG DIARY MARKETS THIS NOVEMBER

## TOP 10 DIARY PUT MARKETS



## BOTTOM 10 DIARY PUT MARKETS



\*Based on Persons 25-54, November 2014, Total Day M-Sun 5A-5A; Live+24 hours

# AMONG DIARY MARKETS, BLUEFIELD AND JACKSON, TN SAW NOTABLE PUT INCREASES EXCEEDING 20% OVER PRIOR YEAR

## TOP 20 PUT GAIN MARKETS

Market	2013 PUT	2014 PUT	% Change
Bluefield-Beckley-Oak Hill	15.47	19.02	22.9%
Jackson, TN	14.42	17.59	22.0%
Casper-Riverton	10.54	12.76	21.1%
Billings	10.47	12.59	20.2%
Jonesboro	14.65	16.59	13.2%
Columbus-Tupelo-W Pnt-Hstn	16.42	18.22	11.0%
Terre Haute	13.15	14.50	10.3%
Charlottesville	9.29	10.20	9.8%
Glendive	9.58	10.43	8.9%
Greenwood-Greenville	17.97	19.54	8.7%
Columbia-Jefferson City	11.75	12.77	8.7%
Springfield, MO	13.10	14.18	8.2%
Panama City	13.73	14.85	8.2%
Lafayette, LA	14.79	15.88	7.4%
Erie	12.81	13.67	6.7%
Bowling Green	14.01	14.87	6.1%
Springfield-Holyoke	12.72	13.48	6.0%
Alpena	13.82	14.57	5.4%
Myrtle Beach-Florence	16.72	17.51	4.7%
Monterey-Salinas	10.66	11.14	4.5%

## TOP 20 PUT LOSS MARKETS

Market	2013 PUT	2014 PUT	% Change
Topeka	13.34	10.84	-18.7%
Columbia, SC	15.30	12.48	-18.4%
Anchorage	10.64	9.00	-15.4%
Gainesville	12.04	10.25	-14.9%
Victoria	12.23	10.46	-14.5%
Rochestr-Mason City-Austin	11.44	9.93	-13.2%
Medford-Klamath Falls	13.10	11.39	-13.1%
Abilene-Sweetwater	13.44	11.69	-13.0%
Alexandria, LA	15.70	13.66	-13.0%
Twin Falls	12.00	10.46	-12.8%
Rockford	14.95	13.04	-12.8%
Chico-Redding	13.42	11.73	-12.6%
Albany, GA	17.21	15.12	-12.1%
Roanoke-Lynchburg	15.92	14.00	-12.1%
Odessa-Midland	14.02	12.38	-11.7%
Bangor	13.59	12.03	-11.5%
Harrisburg-Lncstr-Leb-York	12.66	11.21	-11.5%
Colorado Springs-Pueblo	12.83	11.37	-11.4%
Elmira (Corning)	13.78	12.24	-11.2%
Marquette	13.89	12.34	-11.2%

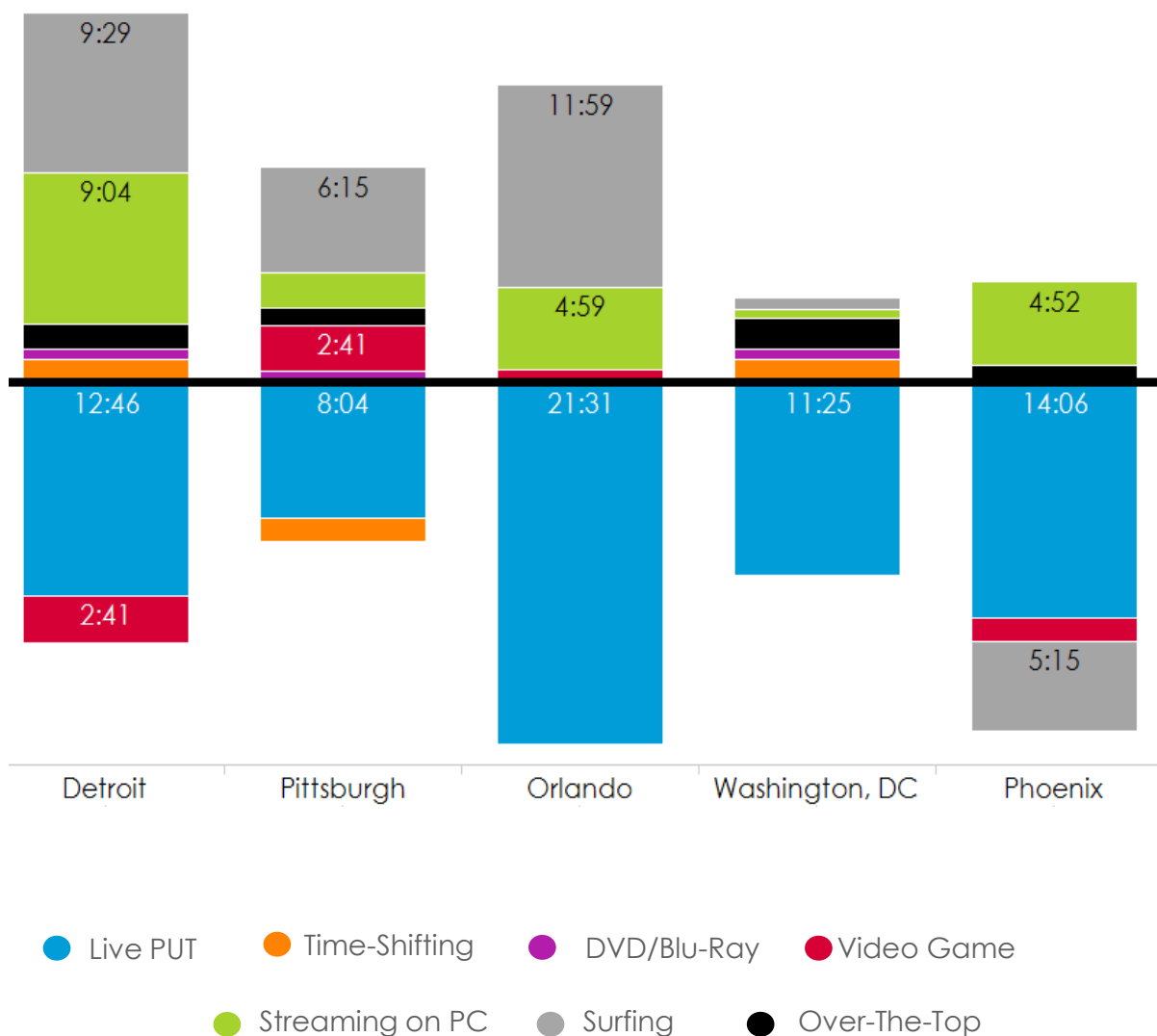
\*Based on Persons 25-54, Total Day M-Sun 5A-5A; Live+24 Hours

# LPM MARKETS WITH THE LARGEST PUT DECLINES SAW INCREASES TO STREAMING AND SURFING



TOTAL DAY | PERSONS 25-54 | NOVEMBER 2013 VS 2014

YOY CHANGE IN TIME SPENT (HH:MM)



\*Based on Persons 25-54, November 2013 vs 2014; Total Day M-Sun 5A-5A; Time Spent Average HH:MM

# SAN FRANCISCO IS THE LOWEST PUT MARKET, BUT RANKS FIRST IN OVER-THE-TOP STREAMING

## PUT AND DEVICE USAGE BY MARKET | NOVEMBER 2014 SWEEP

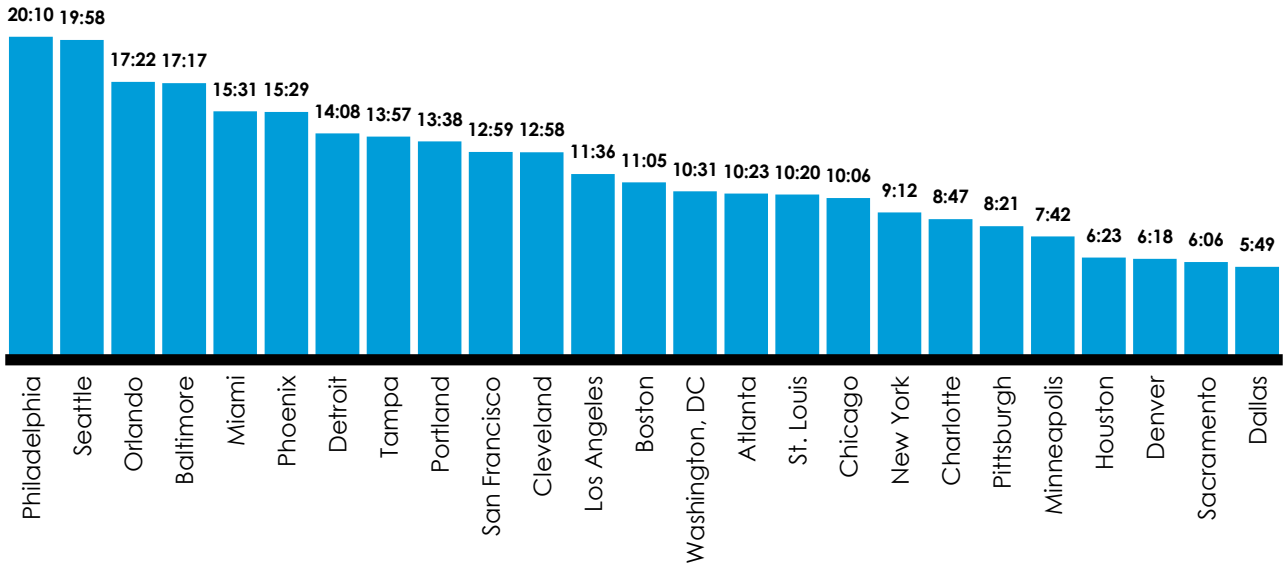
Market Name	Live PUT + Watching Timeshifted TV		Watching Timeshifted TV		Using a DVD/Blu-Ray Device		Using a Game Console		Over-the-Top	
	RTG	Rank	RTG	Rank	RTG	Rank	RTG	Rank	RTG	Rank
Tampa	23.95	1	3.23	9	0.54	21	1.23	4	0.56	10
Cleveland	23.33	2	4.00	2	0.74	9	1.08	9	0.37	22
Detroit	23.21	3	3.66	5	0.79	7	0.85	18	0.41	19
Philadelphia	22.89	4	2.66	21	0.48	23	0.87	17	0.36	24
Atlanta	22.69	5	3.71	3	0.67	13	0.90	14	0.53	11
Pittsburgh	22.63	6	2.73	19	0.77	8	1.24	3	0.37	22
St. Louis	22.26	7	4.01	1	0.71	11	1.13	7	0.30	25
Baltimore	22.07	8	2.47	24	0.68	12	1.18	5	0.75	3
Charlotte	21.42	9	3.22	10	0.71	11	0.94	12	0.64	7
Chicago	20.75	10	3.57	7	0.97	4	1.03	10	0.41	19
Orlando	19.95	11	3.49	8	0.73	10	1.15	6	0.62	8
Houston	19.88	12	2.84	18	0.65	14	0.89	15	0.44	17
Dallas	19.60	13	3.60	6	0.62	16	0.97	11	0.52	12
New York	19.55	14	2.61	22	0.54	21	0.88	16	0.66	5
Sacramento	19.18	15	3.68	4	1.01	2	1.24	3	0.77	2
Miami	18.96	16	2.07	25	0.55	20	0.49	22	0.39	21
Boston	18.74	17	2.97	15	0.53	22	0.92	13	0.49	14
Portland	18.56	18	3.10	13	1.04	1	1.36	1	0.52	12
Minneapolis	18.55	19	2.52	23	0.63	15	0.94	12	0.58	9
Phoenix	18.38	20	3.21	11	0.89	5	0.88	16	0.49	14
Washington, DC	18.02	21	2.71	20	0.57	19	0.80	19	0.65	6
Denver	17.38	22	2.90	16	0.99	3	1.12	8	0.67	4
Seattle	17.18	23	3.14	12	0.81	6	1.27	2	0.48	16
Los Angeles	16.47	24	2.88	17	0.60	18	0.58	20	0.43	18
San Francisco	16.21	25	3.08	14	0.61	17	0.57	21	0.98	1

TAMPA IS TOP LPM FOR PUT AND RANKS FOURTH IN VIDEO GAME USAGE

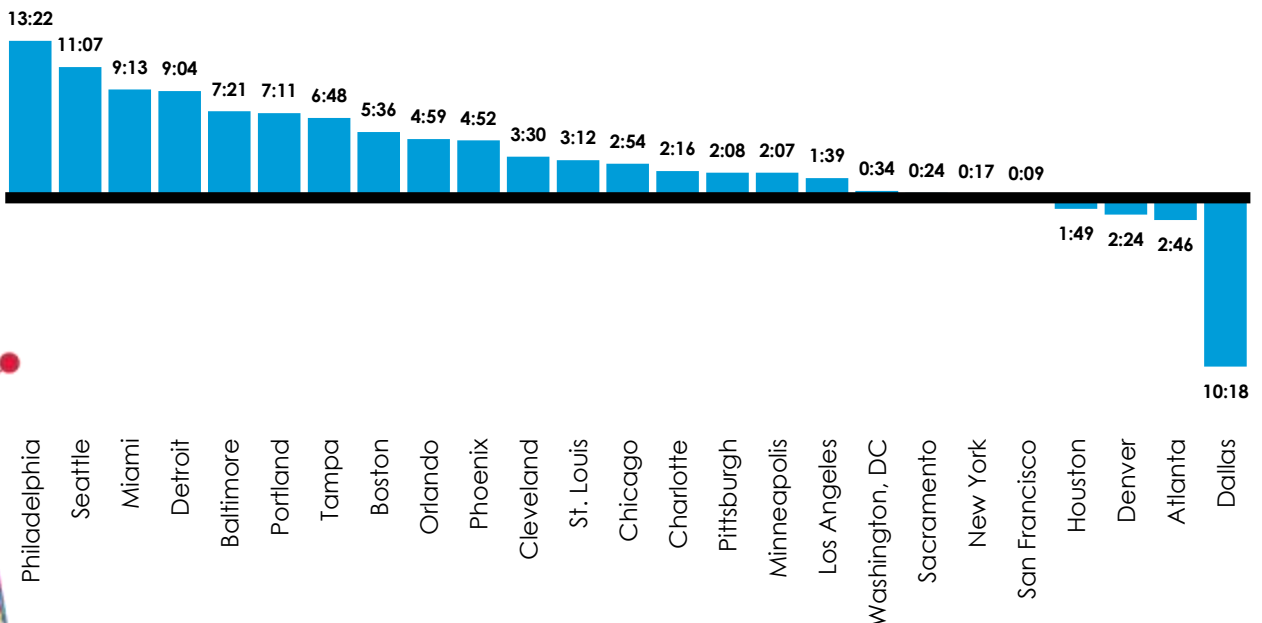
# AMONG LPM MARKETS, PHILLY SPENT THE MOST TIME STREAMING IN NOVEMBER, AND ALSO SHOWED THE LARGEST YOY INCREASE

## TIME SPENT STREAMING ON PC (HH:MM) FOR NOVEMBER 2014 SWEEP

### NOV-14 LPM MARKET RANKER



### YOY CHANGE IN TIME SPENT



\*Based on Persons 25-54, November 2014, Total Day M-Sun 5A-5A; Time Spent Average HH:MM

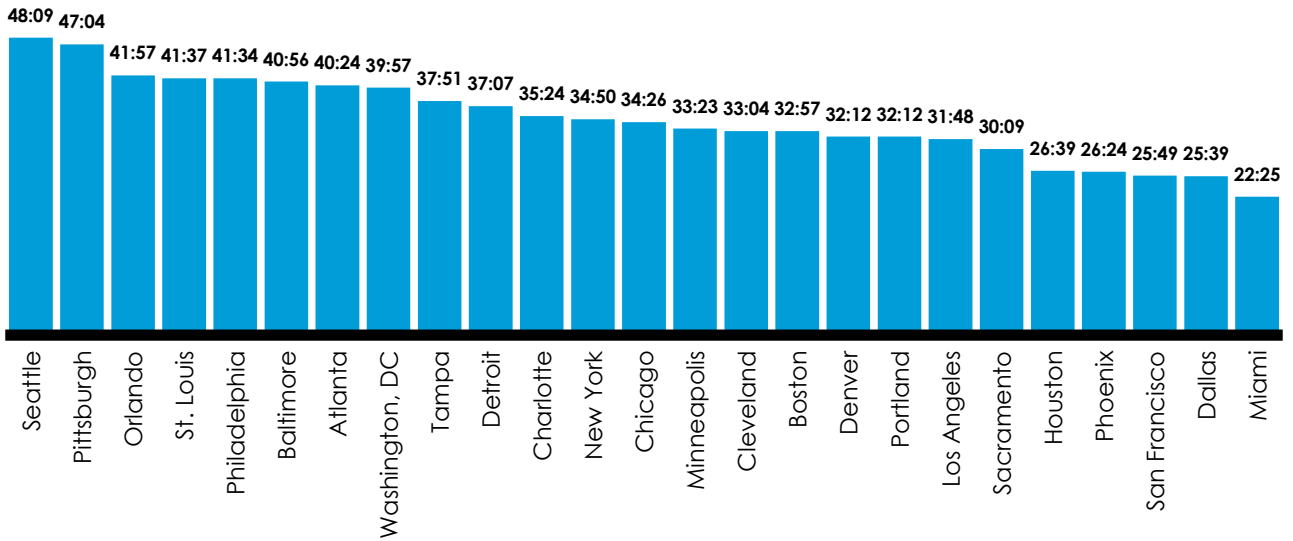


# SEATTLE, PITTSBURGH AND ORLANDO SPENT THE MOST TIME SURFING

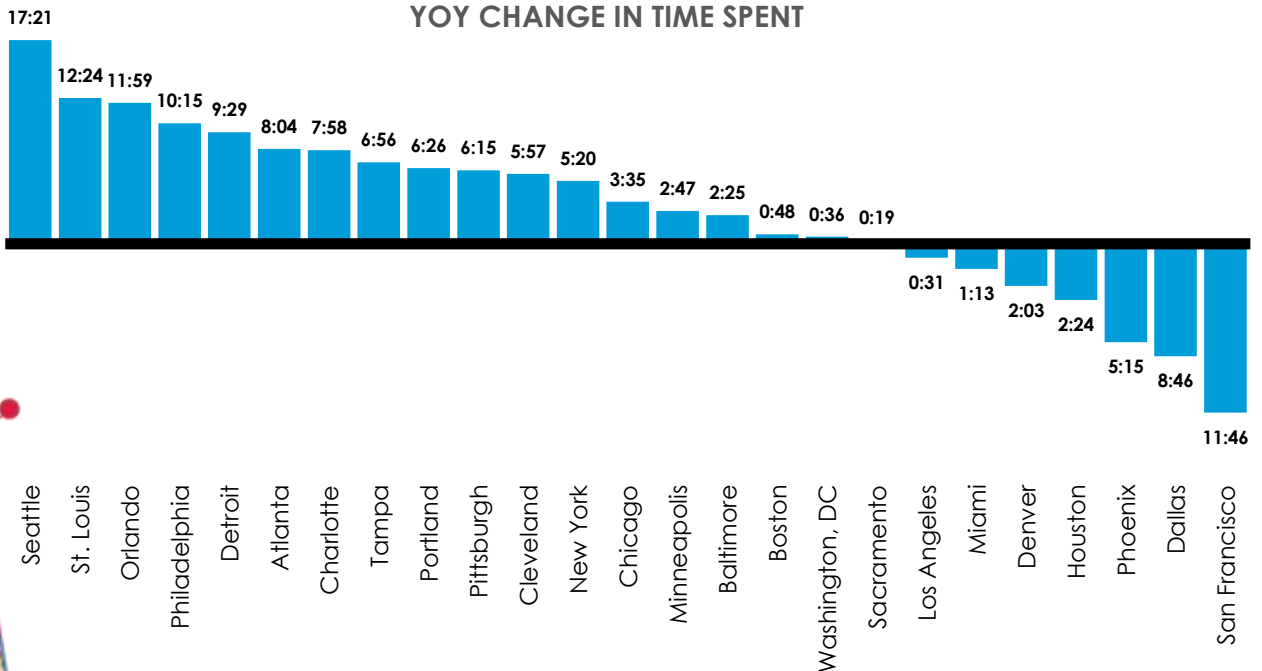


## TIME SPENT SURFING (HH:MM) FOR NOVEMBER 2014 SWEEP

### NOV-14 LPM MARKET RANKER



### YOY CHANGE IN TIME SPENT

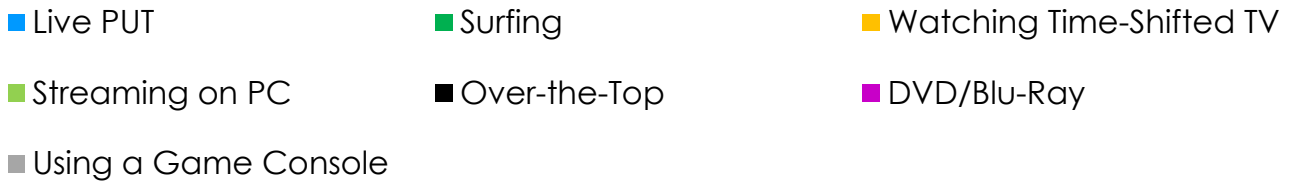


\*Based on Persons 25-54, November 2014, Total Day M-Sun 5A-5A; Time Spent Average HH:MM

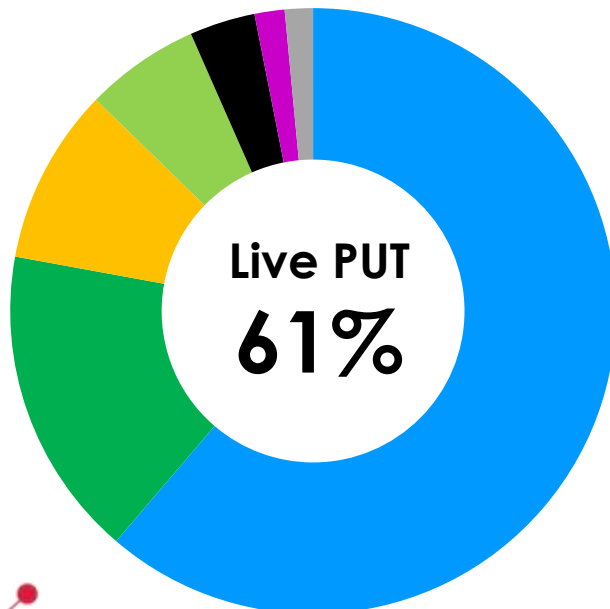
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# WHEN FACTORING IN SURFING AND STREAMING, DEVICE USAGE ACCOUNTS FOR NEARLY HALF OF MEDIA CONSUMPTION IN SAN FRANCISCO

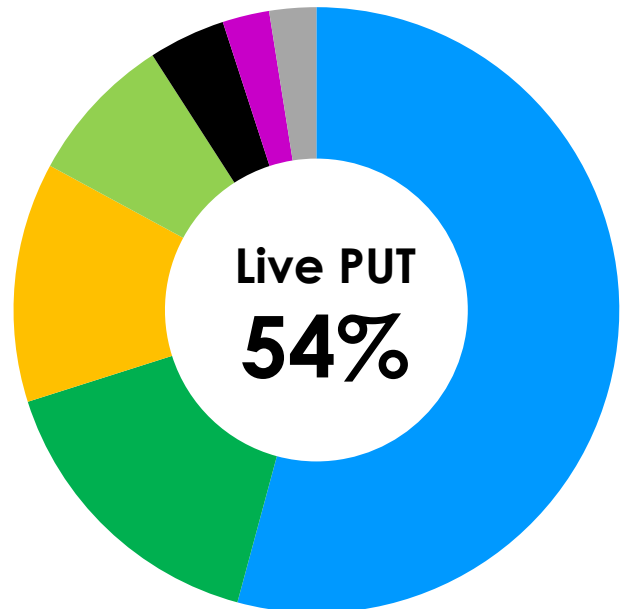
## DISTRIBUTION OF TOTAL TIME SPENT BY DEVICE



TAMPA



SAN FRANCISCO



In comparing the lowest and highest PUT markets, a similar distribution of media usage emerges, with Surfing coming in as the runner up to Traditional TV

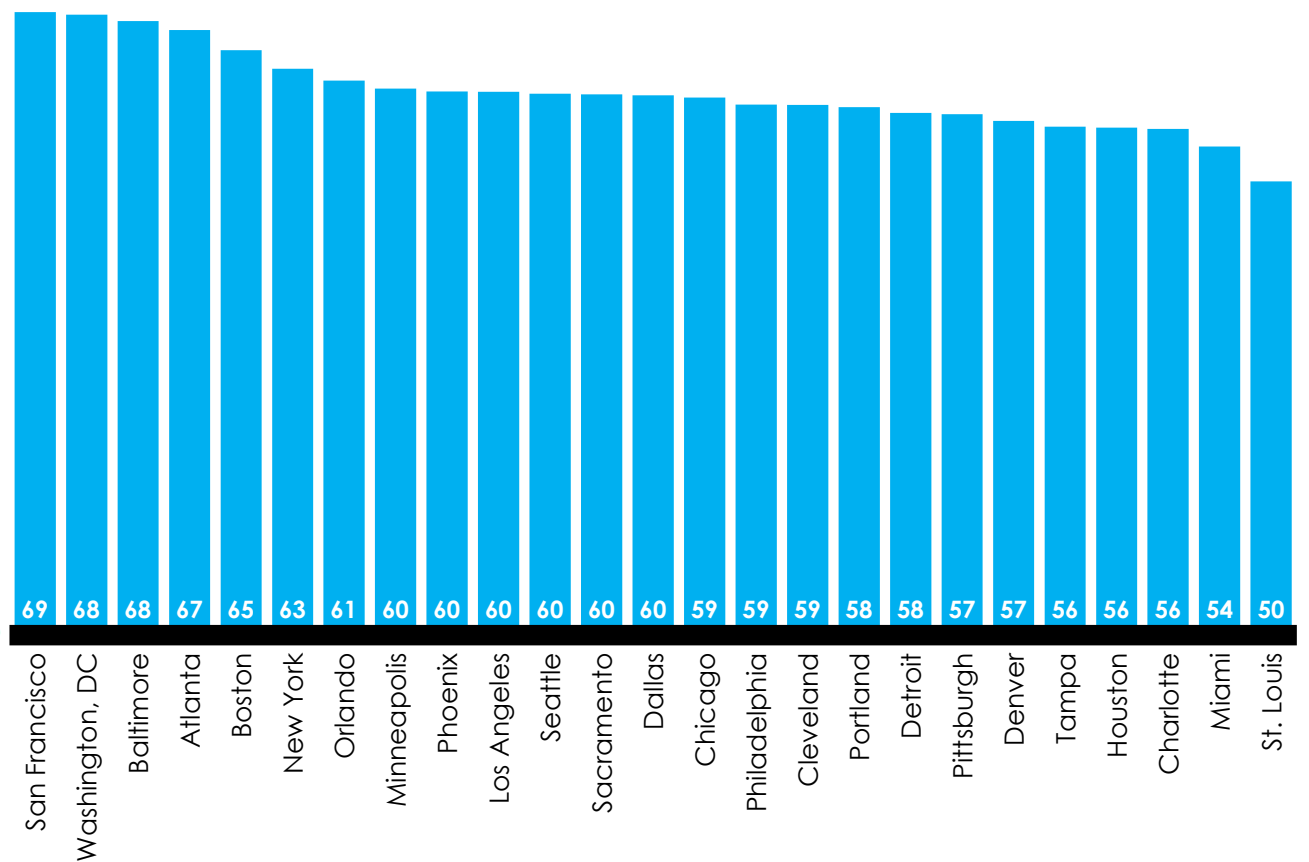
# TABLET PENETRATION AMONG LPM MARKETS CONTINUES TO GROW



## PERSONS 25-54 OWNING A TABLET | NOVEMBER 2014 SWEEP

YOY Percentage Change

15% 15% 18% 19% 11% 12% 18% 21% 29% 19% 20% 15% 25% 15% 19% 16% 15% 14% 19% 12% 12% 18% 24% 15% 16%



All LPMs saw significant growth in tablet penetration, with Phoenix having the highest and Boston having the lowest

\*Based on Average Intab Persons 25-54 homes owning one or more tablets, November 2013 vs 2014



# SMARTPHONE AND SMART TV PENETRATION BY LPM MARKET

## Smartphone

## Smart TV

Market	Penetration	YOY
Houston	84%	12%
Washington, DC	84%	9%
Dallas	84%	8%
Atlanta	84%	15%
Boston	83%	17%
Orlando	82%	17%
Phoenix	81%	6%
Los Angeles	81%	7%
Denver	81%	17%
Seattle	81%	12%
Chicago	80%	9%
Miami	80%	7%
Philadelphia	79%	10%
San Francisco	79%	9%
Portland	79%	15%
Baltimore	79%	7%
Charlotte	79%	14%
New York	77%	8%
St. Louis	77%	12%
Tampa	76%	12%
Minneapolis	76%	12%
Detroit	74%	16%
Sacramento	74%	5%
Pittsburgh	71%	13%
Cleveland	66%	10%

Market	Penetration	YOY
Sacramento	32%	8%
Houston	31%	11%
San Francisco	30%	6%
Baltimore	28%	7%
Boston	28%	6%
New York	28%	8%
Los Angeles	27%	7%
Miami	27%	5%
Washington, DC	27%	4%
Seattle	26%	8%
Dallas	26%	4%
Atlanta	26%	8%
Orlando	26%	6%
Tampa	26%	5%
Chicago	24%	5%
Denver	23%	4%
Phoenix	23%	4%
Cleveland	22%	5%
Portland, OR	22%	3%
Detroit	22%	6%
Minneapolis	21%	4%
Philadelphia	19%	3%
St. Louis	17%	3%
Charlotte	17%	5%
Pittsburgh	15%	2%

\*Smartphone based on P13+, Smart TV based on HHs; Penetration % for 2014 only

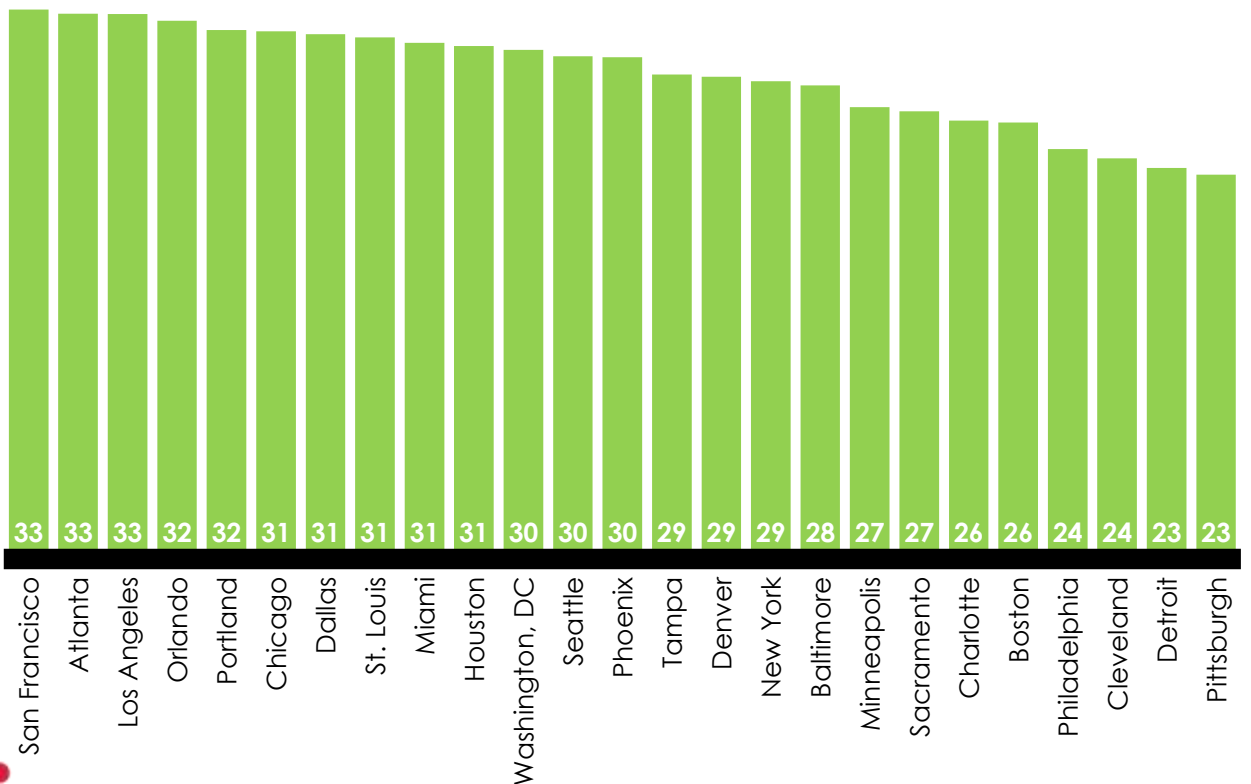
YOY = November 2014 vs. 2013

# MOST LPM MARKETS SAW DOUBLE DIGIT YEAR-OVER-YEAR GROWTH TO MOBILE VIDEO

## MOBILE VIDEO PENETRATION AMONG SMARTPHONE OWNERS

YOY Percentage Change

28% 17% 25% 21% 7% 30% 36% 39% 13% 9% 45% 22% 3% 32% 13% 20% 18% 50% 2% 11% 12% 20% 14% 12% 25%

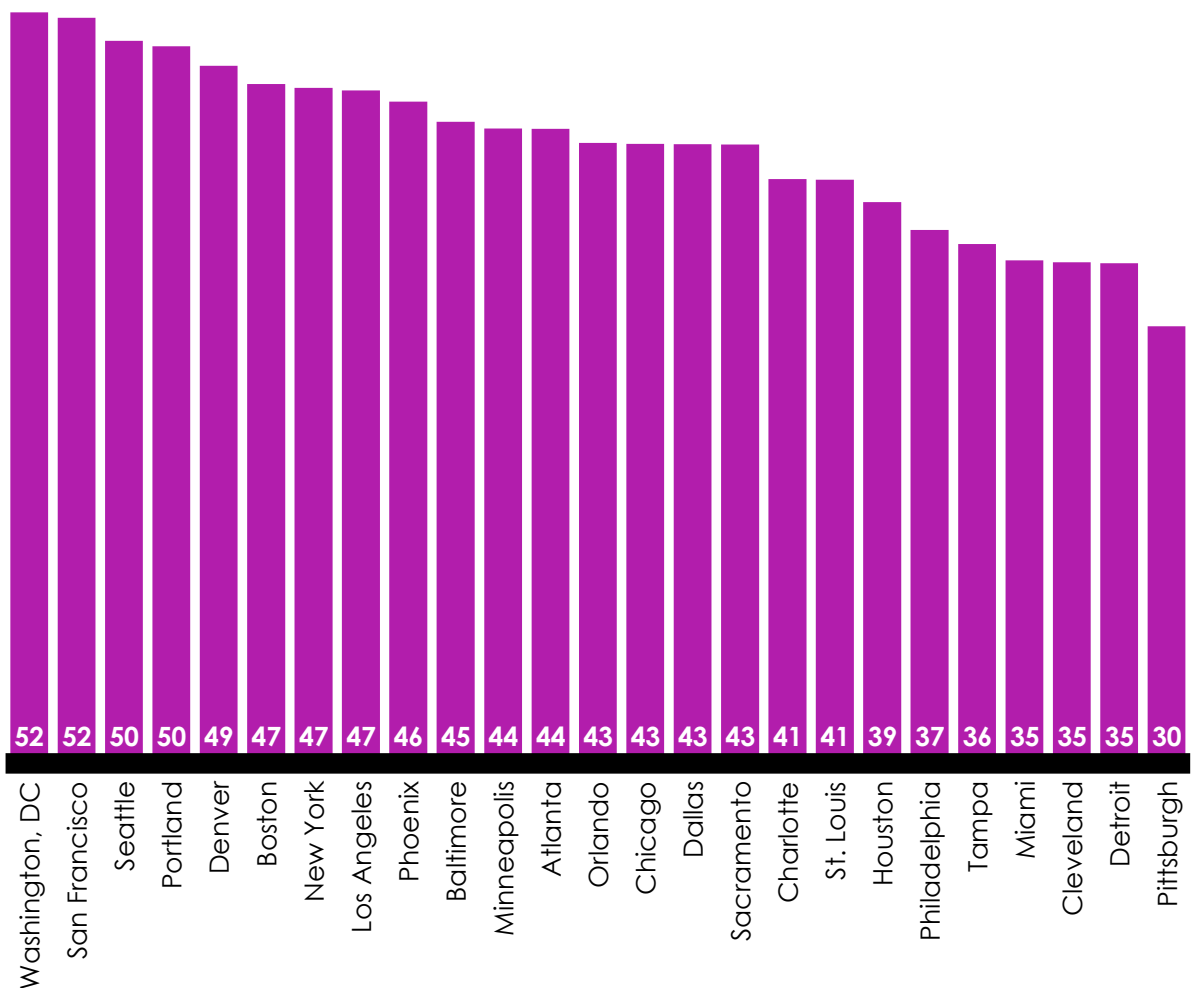


San Francisco was highest in mobile video among LPM markets, while Minneapolis had the highest YOY growth

# SUBSCRIPTION VIDEO ON DEMAND IS GROWING ACROSS THE COUNTRY

## SUBSCRIPTION VOD PENETRATION AMONG LPM MARKETS

OVER HALF OF THE SAN FRANCISCO AND WASHINGTON, DC MARKETS SUBSCRIBE TO NETFLIX, AMAZON OR HULU PLUS



\*Based on Households with subscription to any SVOD service; November 2014

SVOD data became available in our systems on September 27, 2014

# SUMMARY OF FINDINGS

## OVERALL KEY TAKEAWAYS

- November 2014 saw decreases to PUT and overall usage across LPM markets for all dayparts
- Among LPM markets, Non-HUT sources saw growth in all dayparts
- In comparing market groups, Set Meter showed the largest PUT declines across dayparts
- Across LPM markets, share of viewing to traditional TV has dropped from 83% in 2010 to 76% this past November
- Generally, those markets with the largest PUT declines have seen increased time spent surfing and streaming
- Year over year tablet penetration saw increases between 8-24% across the LPM markets

## MARKET HIGHLIGHTS

- Tampa had the greatest overall usage among LPM markets, while Los Angeles had the lowest
- San Francisco was the lowest PUT market, but ranked first in Over-the-Top streaming
- Among LPM markets, Orlando, Phoenix and Detroit saw the largest YOY declines in TV usage
- Among Diary markets, Bluefield and Jackson, TN saw PUT increases over 20% compared to prior year
- San Francisco was highest in mobile video among LPM markets, while Minneapolis showed the highest YOY growth
- Smart TV penetration continues to grow across all markets with Sacramento having the greatest percentage of Smart TVs
- Philadelphia spent the most time streaming while Seattle spent the most time surfing among LPM markets
- Washington, DC and San Francisco are tied at 52% for highest penetration of Subscription Video-on-Demand service

# SOURCING & TERMINOLOGY

## METHODOLOGY IMPACTS TO NOTE:

As of January 2014, HUT/PUT calculations in LPM markets reflect all time-shifted television usage – including usage beyond 7 days – at the time of play vs. the former calculation which credits playback to the time of record.

**To adjust for the change, DVR Playback has been added to Live PUT in LPM markets for November 2010 through November 2013 in an effort to make these figures as comparable to the new definition as possible.**

Adding DVR Playback to PUT does not account for duplicate viewing that could occur with the new methodology (ie. Within the same quarter hour a viewer can credit both XPLT and PUT). Hence, for LPM markets, the November 2010 through November 2013 data could be overstated compared to the 2014 numbers.

November 2013 data includes Broadband Only Homes. As of November 2014, these homes were removed from the LPM sample. Therefore, usage could be understated compared to other years.

## EXPLANATION OF TERMS USED IN THIS REPORT:

**Weighted Average:** The 25 Market LPM Average is based on a weighted calculation using the ratings and SOW units.

**Smart TVs** are defined as capable and enabled; based on HHLD average scaled installed sample

**Over-the-Top streaming** as mentioned in this report is the sum of AOVO and XWWW, where AOVO includes usage when the following devices are connected to and viewing occurs through the television: Karaoke Machines, Video Camcorders, Security/Digital Cameras. XWWW includes usage of a multimedia device, such as Apple TV, Roku or Google Chromecast, Smartphones or Tablets through the television.

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