



MEDIA TRENDS REPORT

LOCAL EDITION | FEBRUARY 2015

INTERNAL USE ONLY

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DASHBOARD INSIGHTS BROUGHT TO LIFE

BRINGING YOU A SAMPLING OF STORIES FROM OUR SPOTFIRE DASHBOARDS

These days, video content is everywhere. And it's being consumed more than ever. With new trends emerging, it's critical to understand what our measurement data is telling us.

In an effort to keep you informed of local trends, we have summarized key findings from our library of Media Trends dashboards, giving you a proactive overview of audience shifts.

From affiliate ratings to device ownership, this report contains powerful insights into how media consumption is changing across markets. We know every market is unique, and this report is designed to visually illustrate the differences.

The analyses contained in this report are but only a small slice of what's available on our site. Customized views are ready for sharing, requiring only a few clicks. We hope this guide will empower you to educate curious clients while keeping you versed on market trends. It's a win-win.

The Media Trends Team

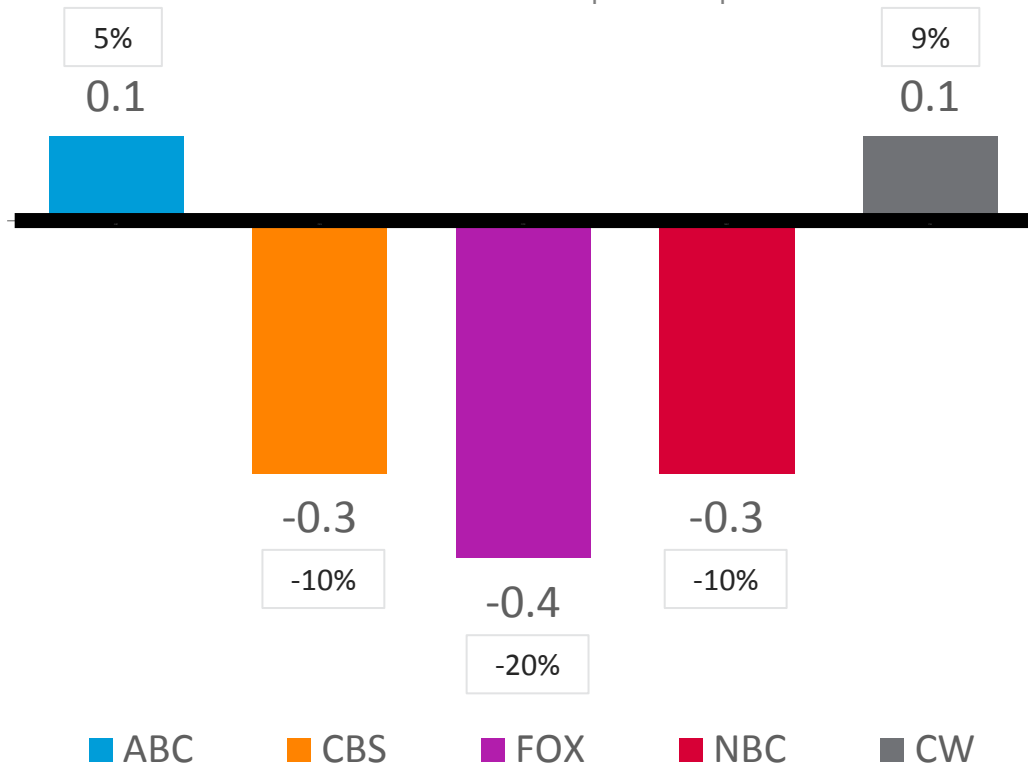


A LOOK AT YEAR OVER YEAR BROADCAST NETWORK PERFORMANCE



LPM NETWORK RATINGS DASHBOARD

WEIGHTED AVERAGE YOY RATING CHANGE
NOVEMBER 2014 vs 2013 | PRIME | P25-54



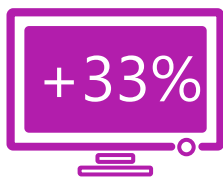
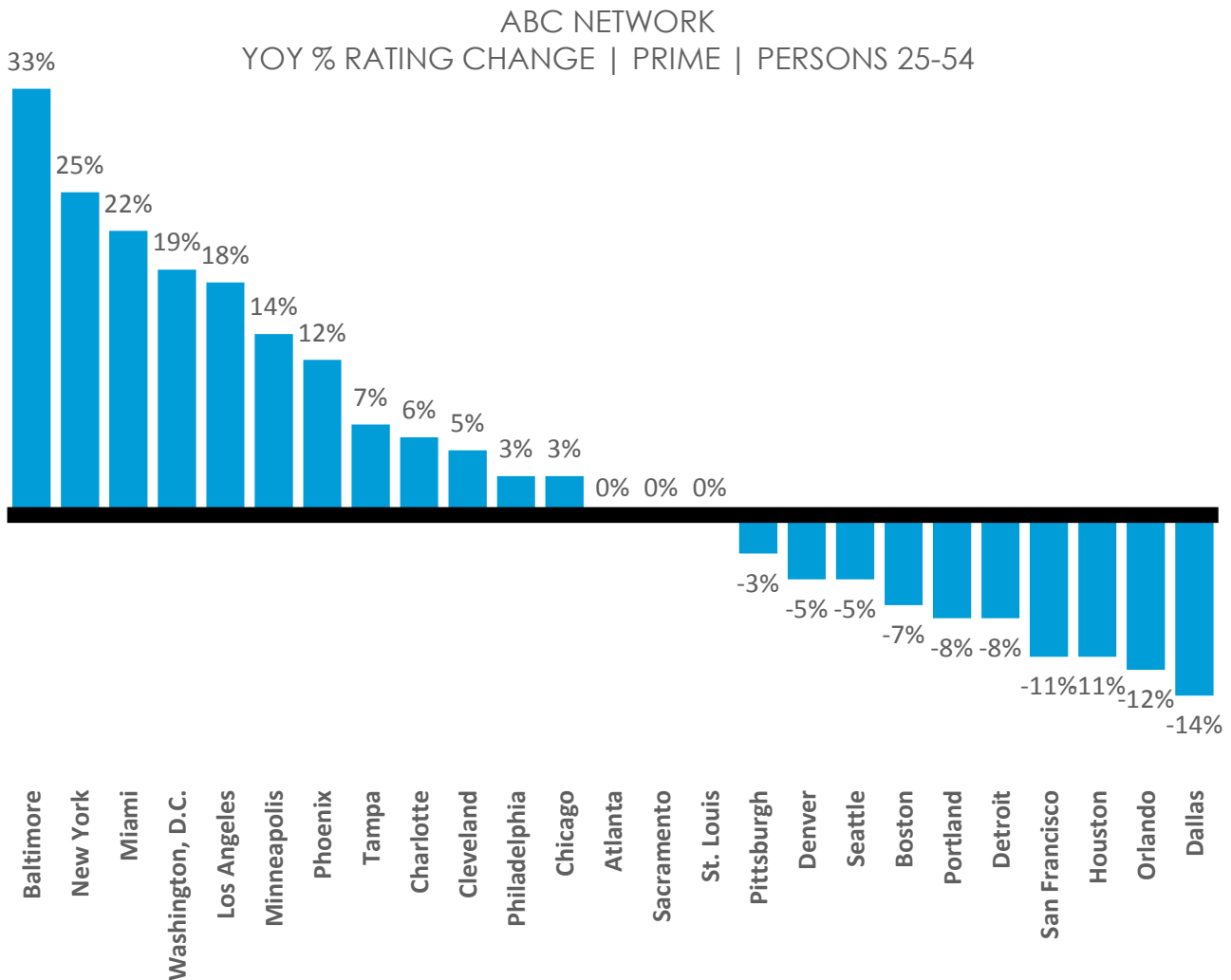
For Primetime, ABC and CW gained a tenth of a rating point on average. The other affiliates dropped 0.3-04 rating points (10-20%), with FOX taking the biggest hit. Overall, Total Day ratings were flat compared to last November across the affiliates.

*Based on M-Su Prime to 11PM; 25 LPM Market Weighted Average; Live Data Stream

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WHEN LOOKING AT LOCAL AFFILIATE PERFORMANCE, WE CLEARLY SEE WHICH MARKETS ARE DRIVING THE DIFFERENCES

LPM NETWORK RATINGS CONTINUED...



THE BALTIMORE ABC AFFILIATE SAW THE LARGEST YEAR OVER YEAR PERCENTAGE GAIN IN PRIMETIME RATINGS

ON AVERAGE ACROSS THE LPM MARKETS, ABC RATINGS GREW

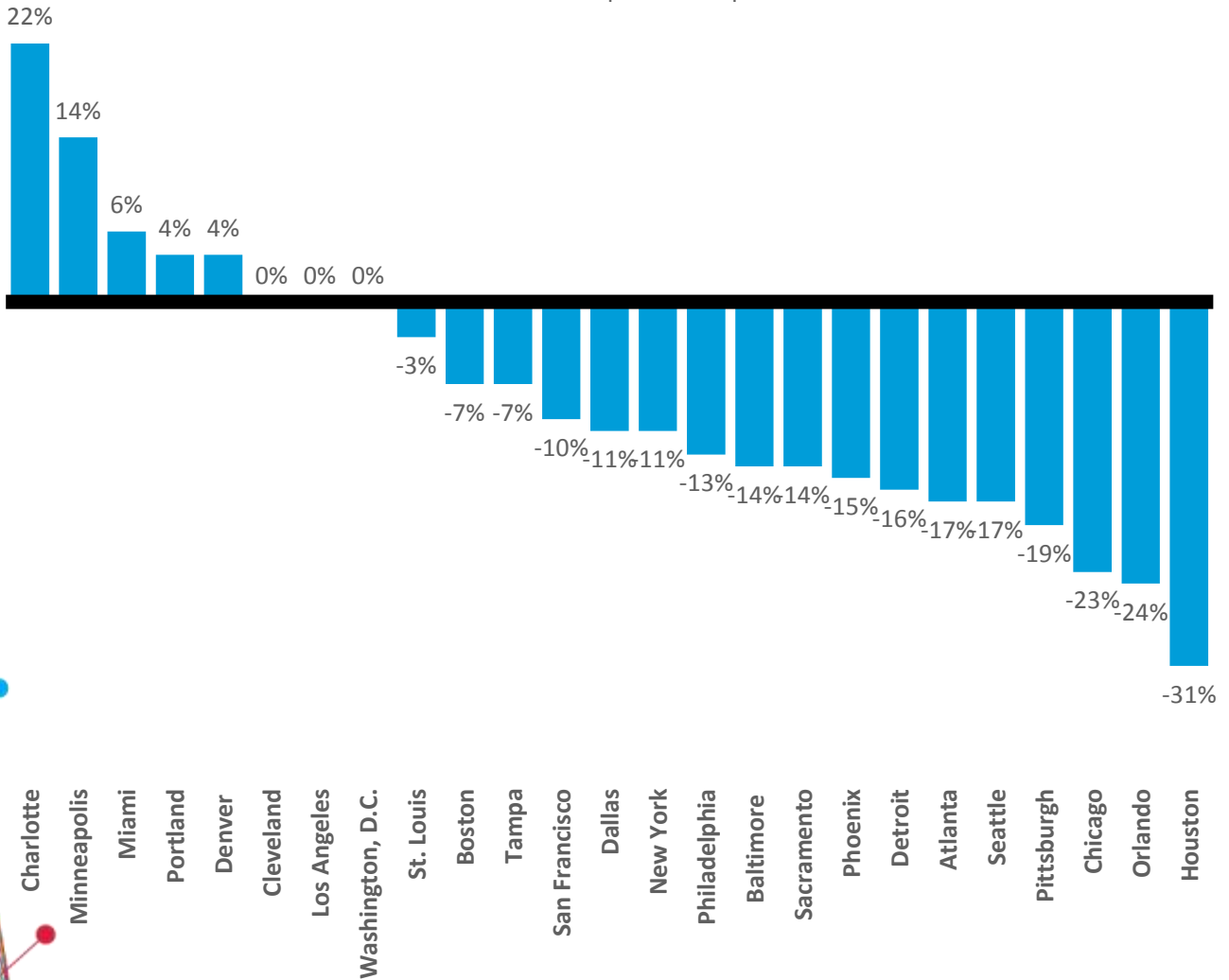
5%

COMPARED TO PRIOR YEAR

CHARLOTTE SAW THE LARGEST YEAR OVER YEAR PERCENTAGE GROWTH TO CBS DURING PRIME, WHILE HOUSTON SHOWED THE LARGEST DECLINE

LPM NETWORK RATINGS CONTINUED...

CBS NETWORK
YOY % RATING CHANGE | PRIME | PERSONS 25-54

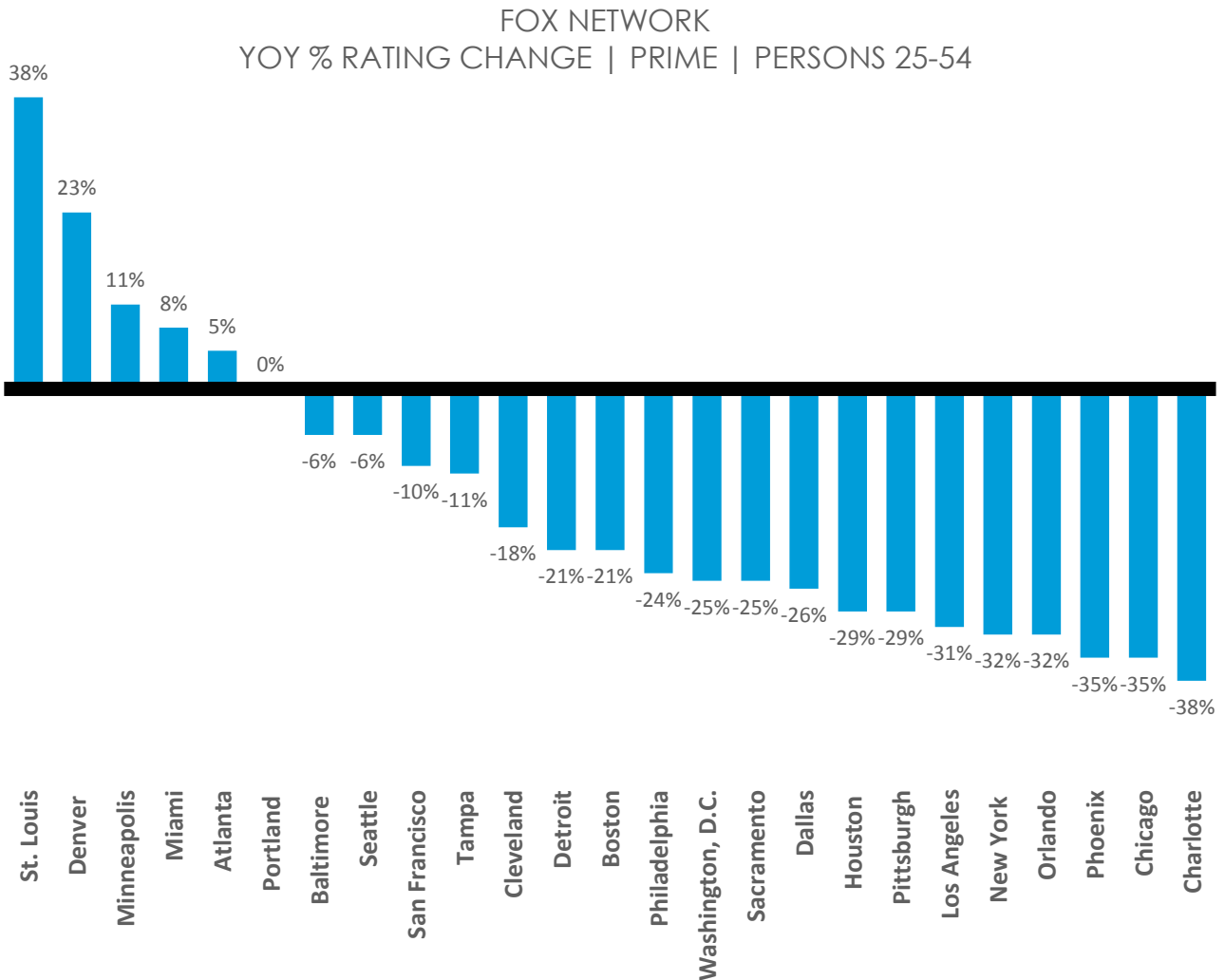


RATINGS FOR **CBS** FELL 10% ON AVERAGE ACROSS THE LPM MARKETS, WITH 17 OF THE 25 MARKETS REPORTING DECLINES.

*Based on M-Su Prime to 11PM; 25 LPM Market Weighted Average; Live Data Stream

ST. LOUIS SAW THE LARGEST PERCENTAGE GROWTH TO FOX DURING PRIMETIME, WHILE CHARLOTTE SHOWED THE LARGEST DECLINE

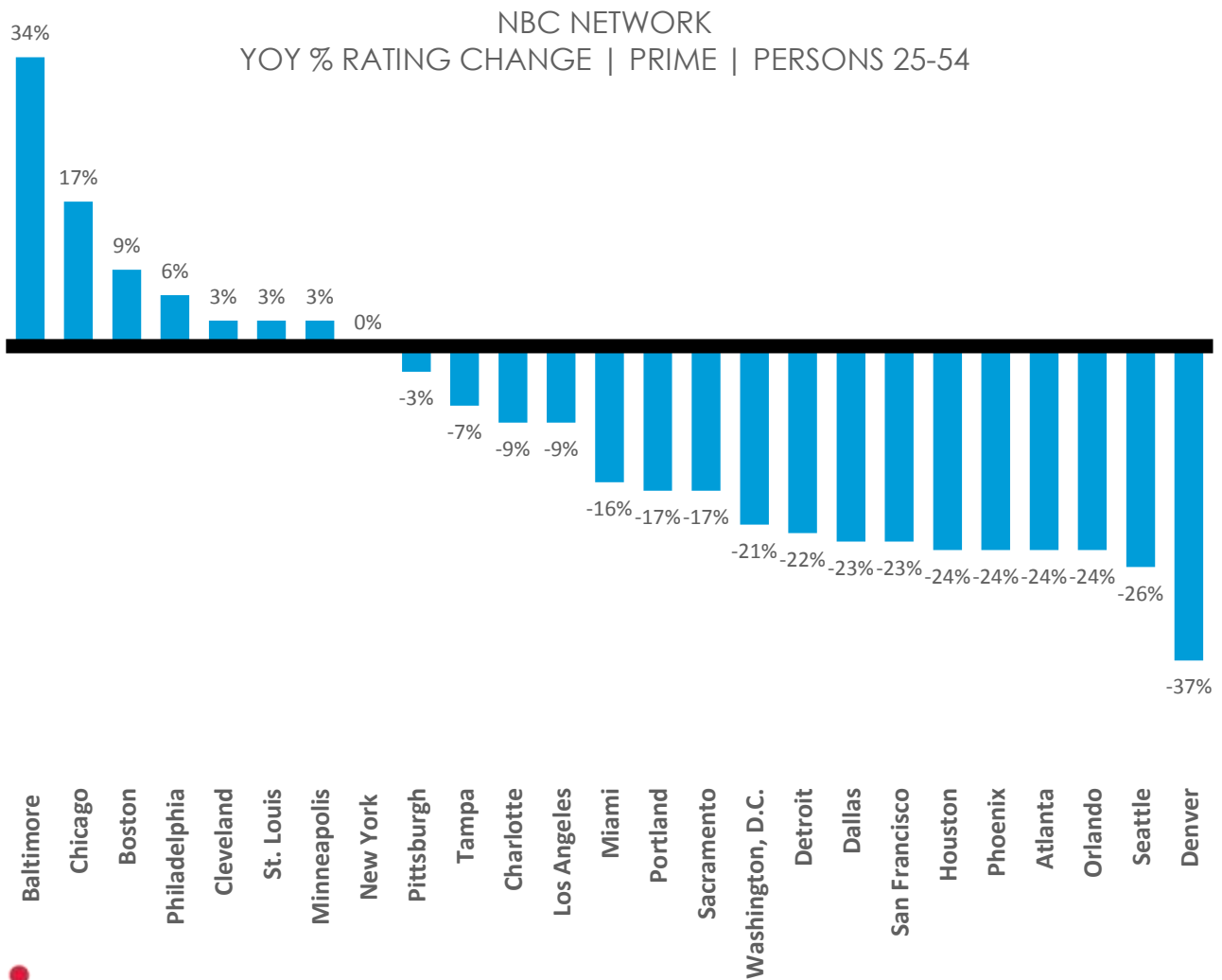
LPM NETWORK RATINGS CONTINUED...



RATINGS FOR **FOX** FELL 20% ON AVERAGE ACROSS THE LPM MARKETS, WITH 19 OF THE 25 MARKETS REPORTING DECLINES.

BALTIMORE SAW THE LARGEST YEAR OVER YEAR PERCENTAGE GROWTH TO NBC DURING PRIME, WHILE DENVER SHOWED THE LARGEST DECLINE

LPM NETWORK RATINGS CONTINUED...



RATINGS FOR **NBC** FELL 10% ON AVERAGE ACROSS THE LPM MARKETS, WITH 17 OF THE 25 MARKETS REPORTING DECLINES.

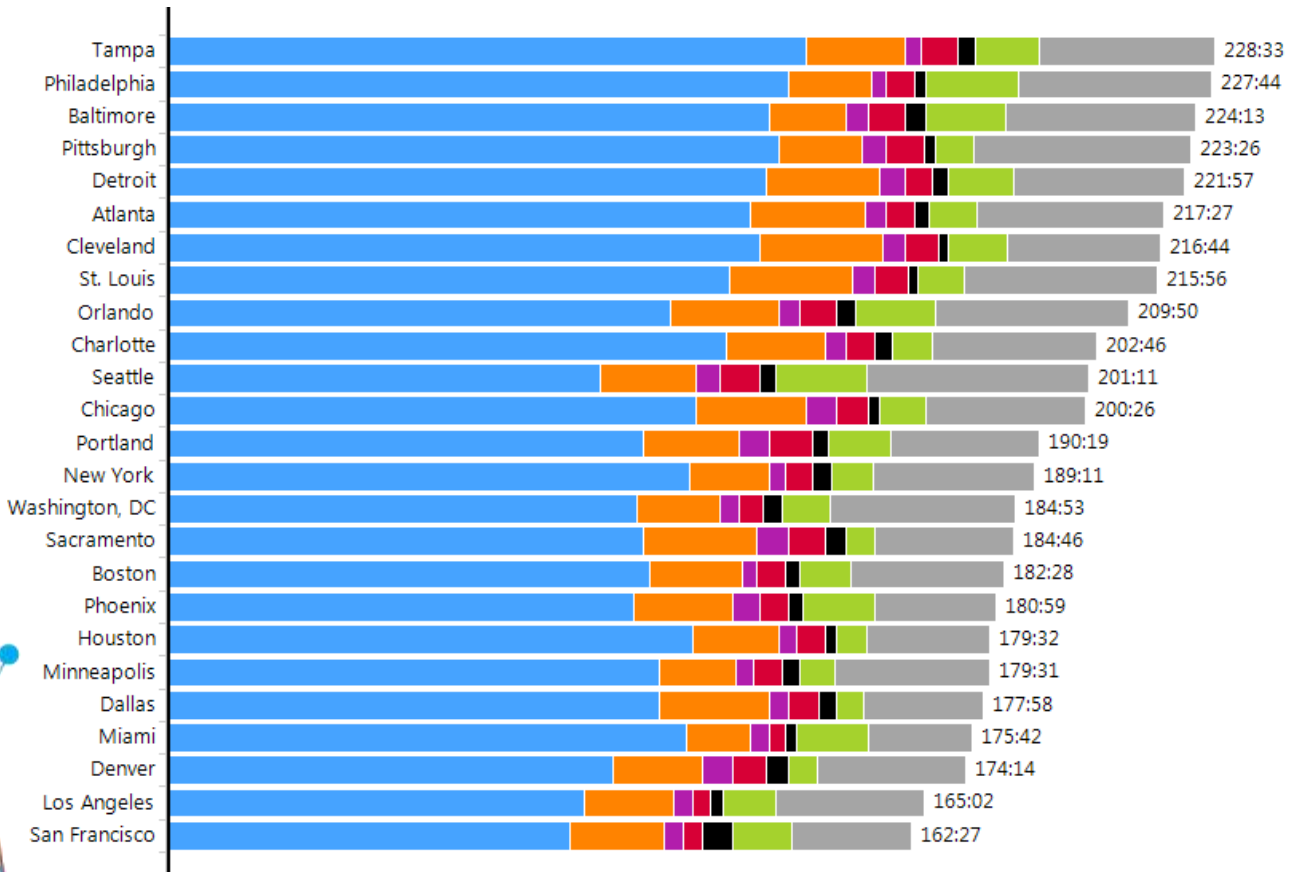
WHAT DOES MEDIA USAGE LOOK LIKE ACROSS DEVICES?



LOCAL CROSS PLATFORM DASHBOARD

TAMPA AND PHILADELPHIA ARE THE MOST CONNECTED MARKETS

PERSONS 25-54 | NOVEMBER 2014 | TOTAL TIME SPENT (HH:MM)



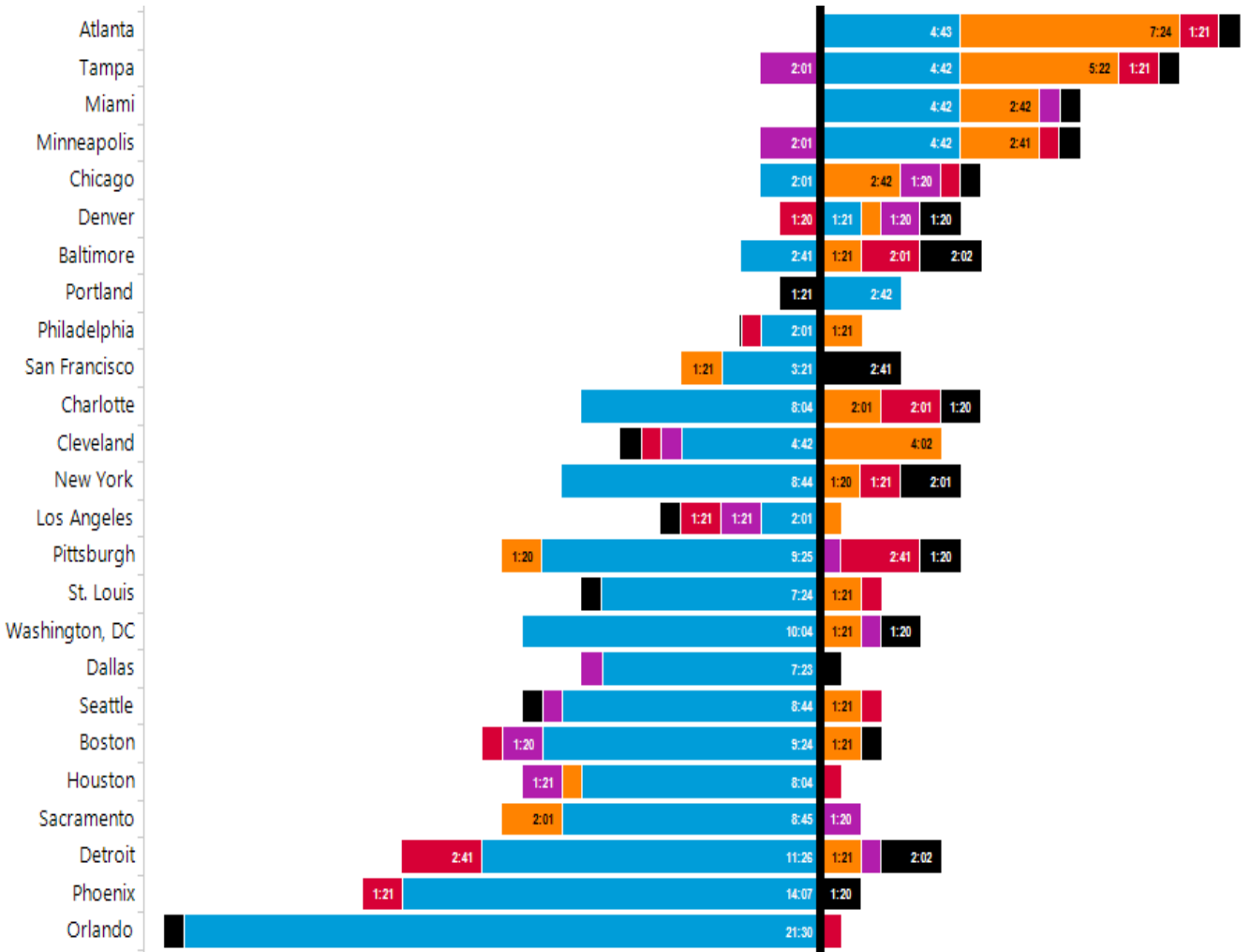
- Live PUT ● Watching Time-shifted TV ● Using a Game Console
- Using a DVD/Blu-Ray Device ● Over-The-Top ● Streaming on PC
- Surfing

*Based on Total Day M-Sun 5A-5A; Live Data Stream

A PRIOR YEAR COMPARISON OF TIME SPENT REVEALS NOTABLE SHIFTS WITHIN MARKETS



LOCAL CROSS PLATFORM CONTINUED...



Live PUT

•Atlanta #1 (+4:43); Orlando last (-21:30)

Watching Time-shifted TV

•Atlanta #1 (+7:24); Sacramento last (-2:01)

Game Console

•Pittsburgh #1 (+2:41); Detroit last (-2:41)

Over-the-Top

•San Francisco #1 (+2:41); Portland last (-1:21)



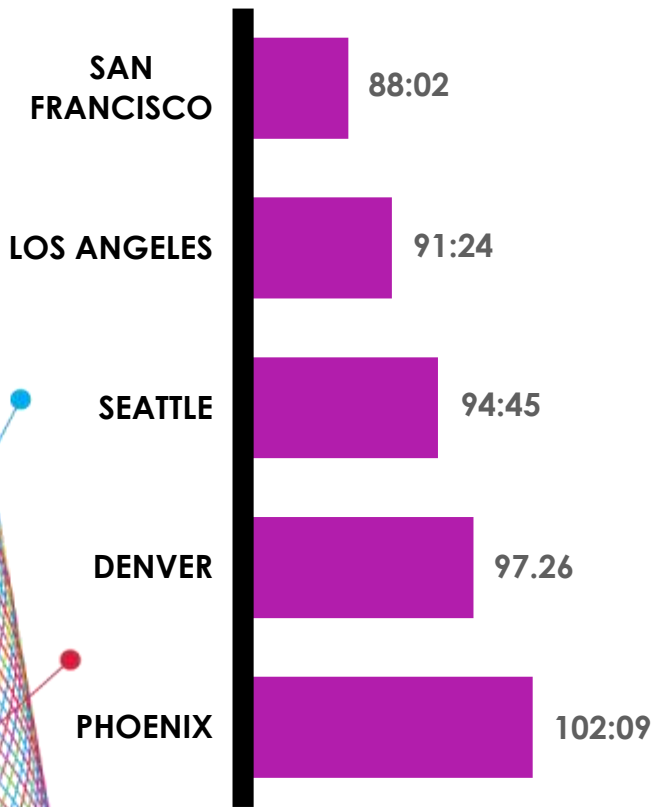
TIME SPENT RANKINGS

Cutting back by device, we can identify which markets are leading others in Traditional TV viewing and Over-the-Top usage.

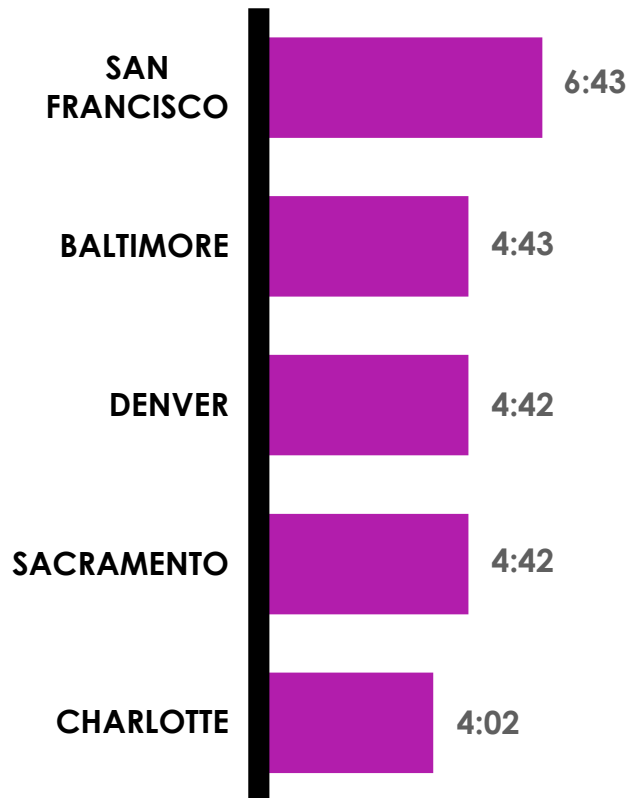
LOCAL CROSS PLATFORM CONTINUED...

SAN FRANCISCO EXHIBITS THE LOWEST LIVE TV CONSUMPTION, WHILE RANKING FIRST IN OVER-THE-TOP USAGE

LOWEST RANKED LIVE TV PUT MARKETS



TOP RANKED OVER-THE-TOP MARKETS



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

SMARTPHONE AND SMART TV PENETRATION BY LPM MARKET



LOCAL DEVICE PENETRATION DASHBOARD

Smartphone

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%

Smart TV

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 2013 vs. 2014,

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SOURCING & TERMINOLOGY

ACCESSING THE DASHBOARDS USED IN THIS REPORT

All data referenced in this report was pulled from Spotfire Dashboards located on the Media Trends iShare site. To access the library, [click here](#). Use your Enterprise ID and password at the Spotfire log-in screen. If you have questions, please contact the [Media Trends Team](#).

The following dashboards were sourced in this report:

- LPM Network Trends
- Local Cross Platform
- Local Device Penetration

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. XWW includes usage of a multimedia device, such as Apple TV, Roku or Google Chromecast, Smartphones or Tablets through the television.

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