



The Power of the Local TV Audience

Texas Association of Broadcasters

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Austin, TX

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The Evolving Media Landscape

How Texans are Streaming

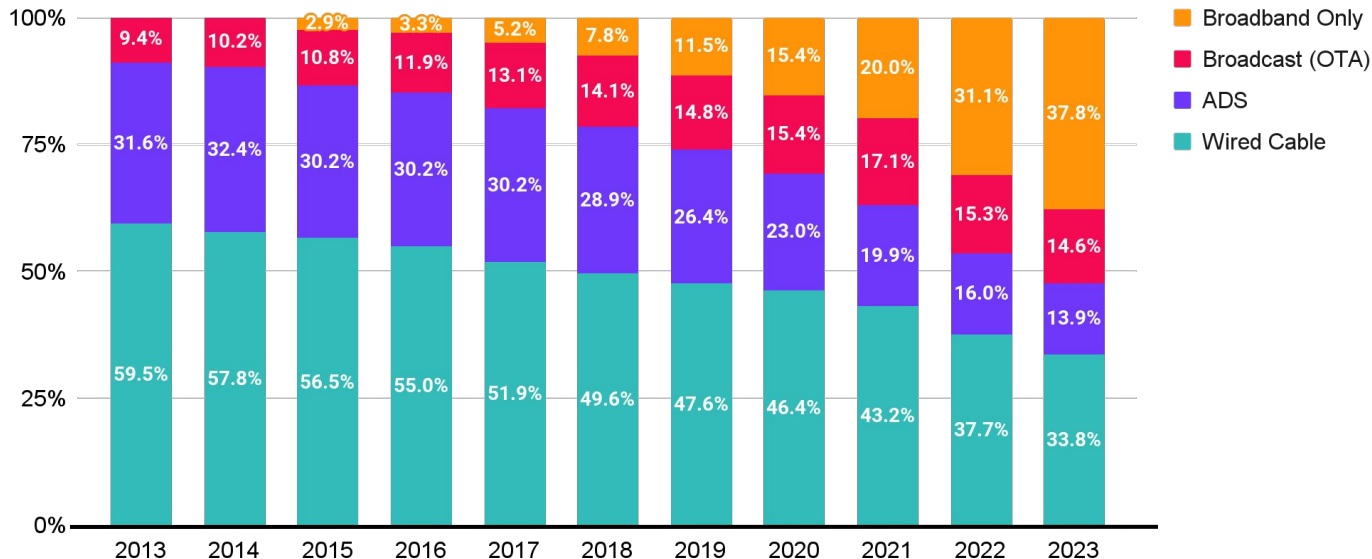
New in 2023: Measuring Local OTT Feeds

Moving Measurement Into the Future

The Evolving Media Landscape

The American Media Landscape

Our world has changed dramatically over the last ten years



OTA and BBO are growing in importance as viewing behaviors shift

OTA & BBO HHs combined account for more than 50% of ALL TV HHs in the US

2021 vMVPD Pen.: **9.7%**

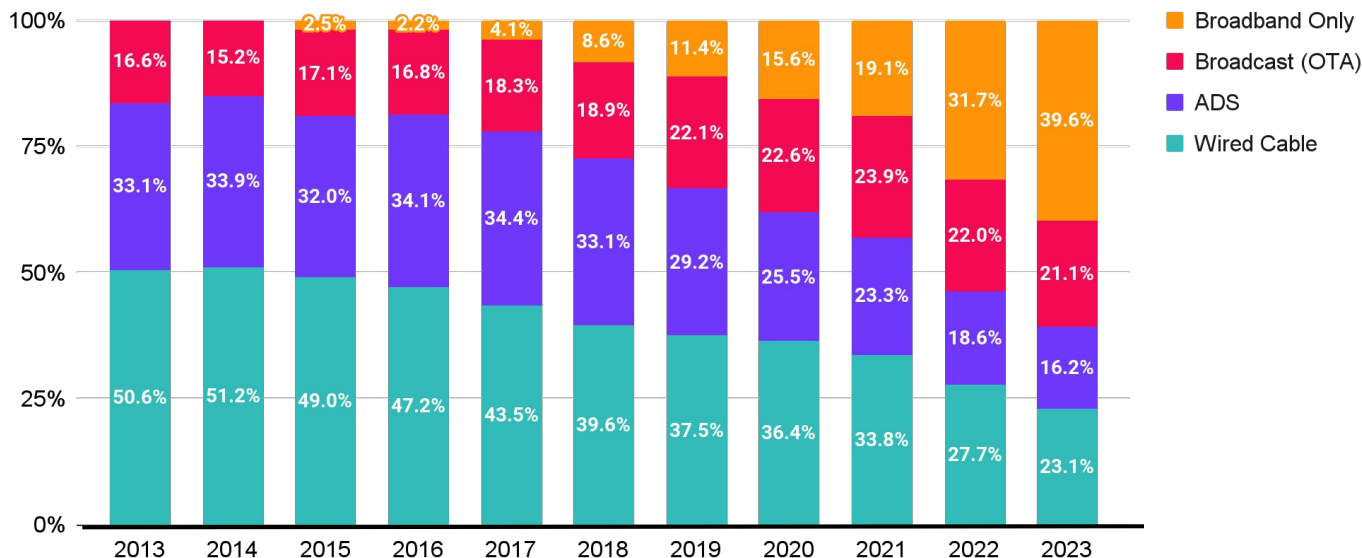
2023 vMVPD Pen.: **15.8%**

Source: National Sample from NPOWER Households (scaled installed counts, May 15 of each year), may sum to over 100 due to rounding



In Texas, more than 20% of HHs are OTA

6 out of 10 Texas HHs are either OTA or Broadband Only



Nationally, OTA + BBO = 52.4%

In Texas, OTA + BBO = 60.7%

Texas 2021 vMVPD Pen.: **11.8%**

Texas 2023 vMVPD Pen.: **18.9%**

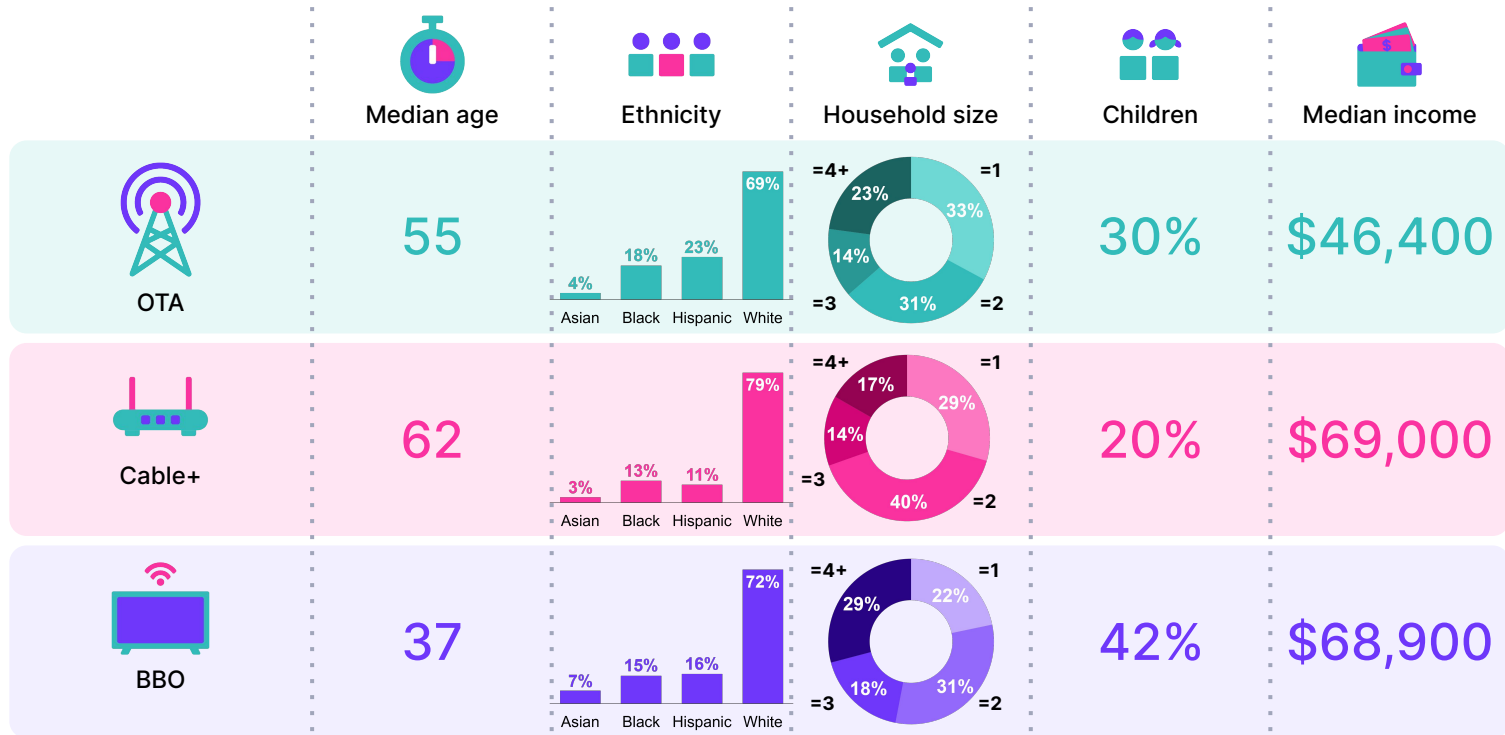
Source: National Sample from NPOWER Households, U.S State = Texas market break (avg installed counts, May 15 of each year), may sum to over 100 due to rounding

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BBO homes are young, diverse and affluent



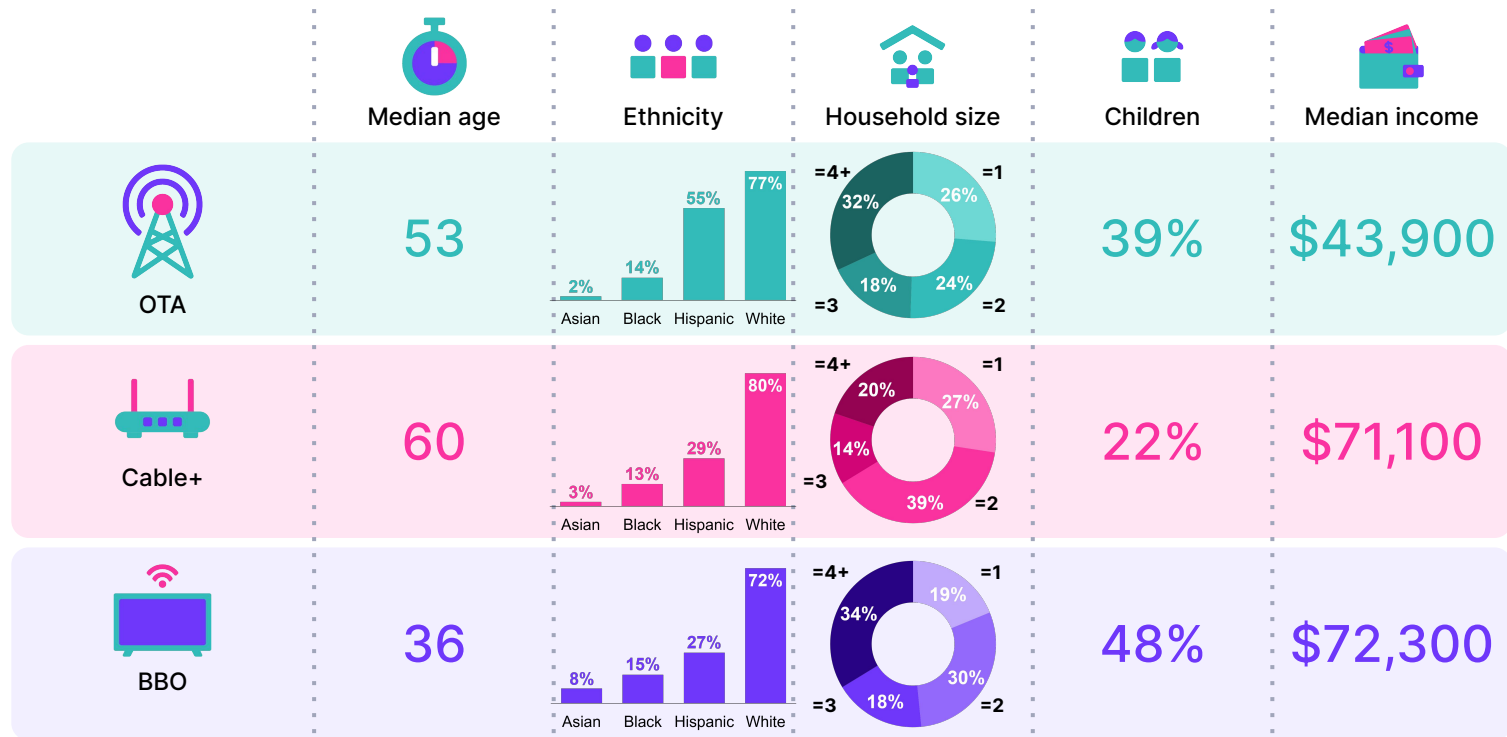
National household profile by cable status, May 2023



Source: Nielsen NPOWER, Based on total U.S. Households, scaled installs as of May 15, 2023, Median age and median income are based on Persons 2+ Total Use of Television

Texas homes are even more diverse and affluent

Texas household profile by cable status, May 2023



Source: Nielsen NPOWER, Based on U.S State = Texas Households, average installs as of May 15, 2023, Median age and median income are based on Persons 2+ Total Use of Television

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More than 28 hours are spent with TV and radio



Weekly time spent with TV and Radio in the state of Texas, Persons 18+



18.3 hours
Live+7 TV



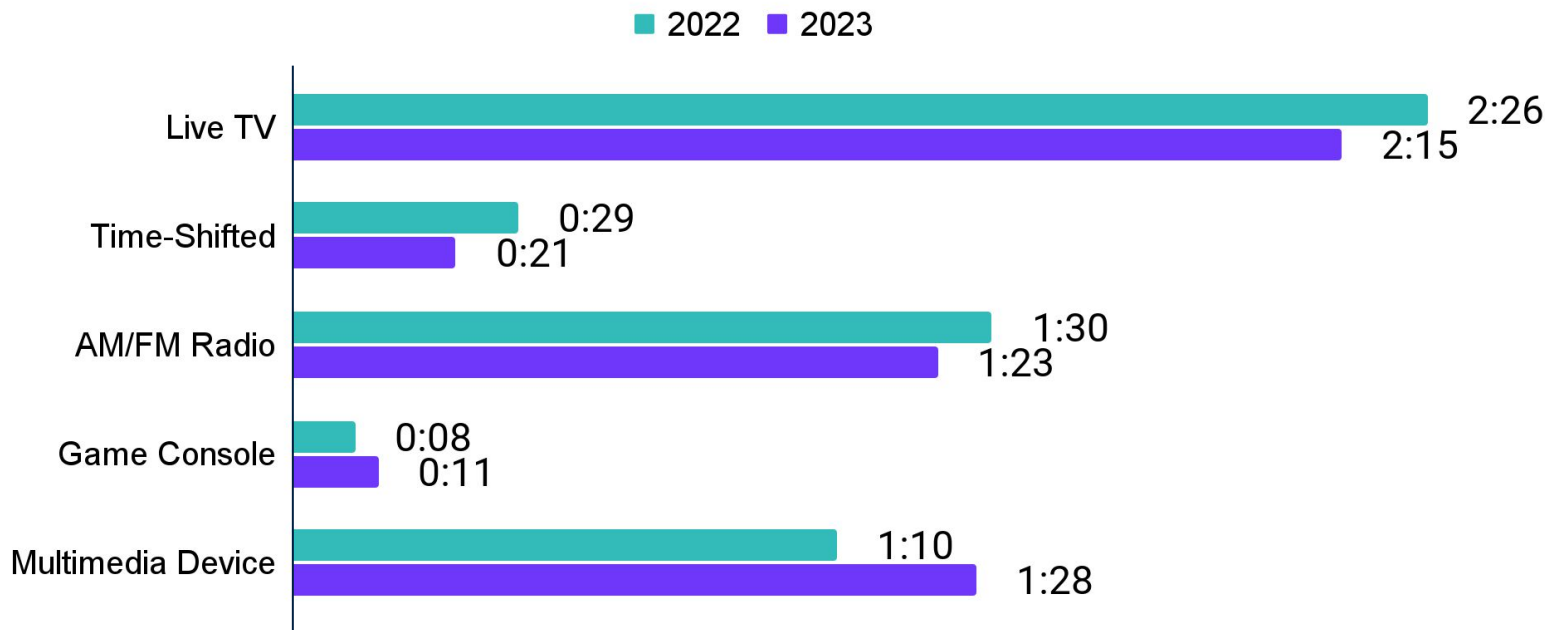
9.8 hours
AM/FM Radio

TV and Radio lead the way for media usage



Texans spend more than 2 hours per day with Live TV

Daily time spent among Persons 18+ (HH:MM)

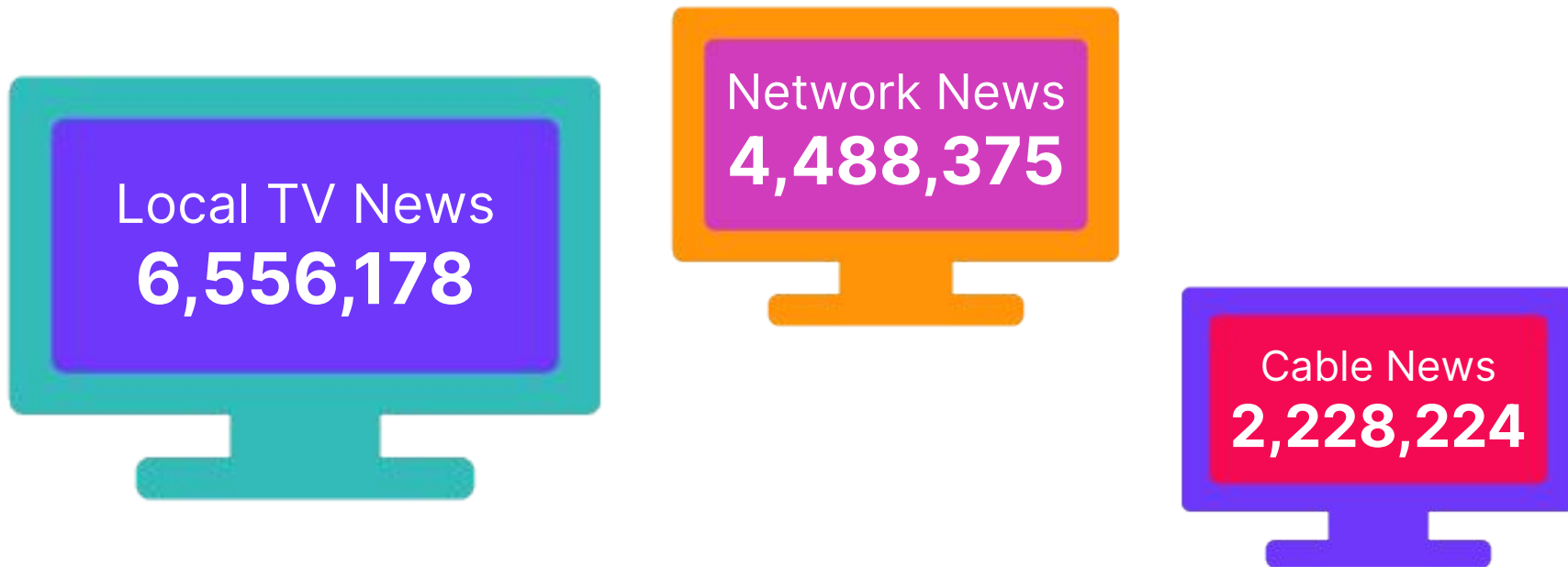


Source: Nielsen NPOWER May 2022 & May 2023 for Live TV, Timeshifted TV, Game Console, Multimedia Devices for U.S State = Texas
Radio: Nielsen NRD Fall 2021 and Fall 2022, State of Texas, Mon-Sun 12m-12m, Weekly Time Spent Listening (TSL) divided by 7 days
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When it comes to news, nothing beats local



Average weekly viewers in the state of Texas, Persons 2+



Source: NLTV May 2023, Live+SD, M-Su 3a-3a, TV Households, Texas Metered Markets (Austin, Dallas, Houston, San Antonio), Persons 2+.
Local News and National News genres among broadcast stations: ABC, CBS, CW, FOX, IND, NBC, PBS, TEL, UMA, UNI; Cable News based on Time Period report among Cable Nets: CNN, CNBC, FXNC, MSNBC
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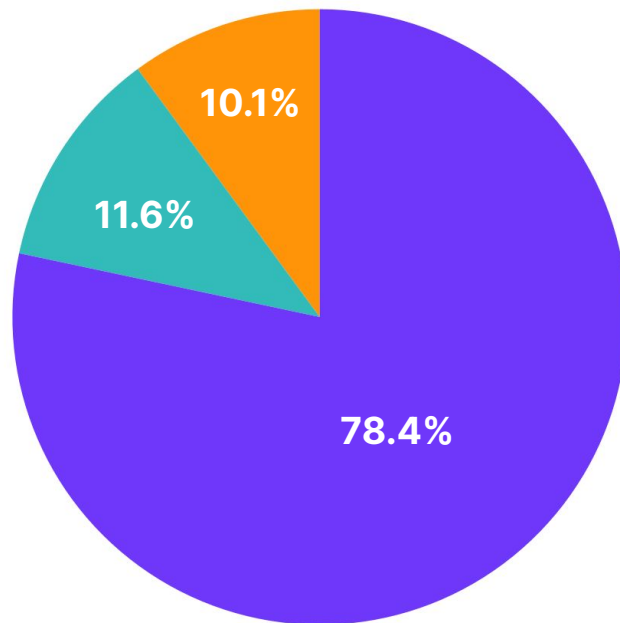
Texans are tuning in to Local News



Local News is consumed across all methods: broadcast, cable and streaming

**% of adults who watch local news TV programs on
broadcast, cable or stream online**

- Only broadcast or cable
- Only streaming
- Both



**Nearly half of the
adults who stream
local news online also
watch local news on
broadcast or cable.**

Source: Nielsen Scarborough, Latest survey available for 19 Texas DMAs, Adults 18+

Texas DMAs watch news, drama and sports



Local News is the top genre in Texas

Top 5 genres in Texas DMAs, May 2023

% of total gross impressions

Persons 2+	% of Total
Local news	24%
General drama	16%
National news	14%
Sports event	7%
General variety	6%

Persons 25-54	% of Total
Local news	22%
General drama	16%
National news	13%
Sports event	9%
General variety	7%

Source: NLTV May 2023 Live+SD, M-Su 3a-3a, Broadcast stations: ABC, CBS, CW, FOX, IND, NBC, PBS, TEL, UMA, UNI, TV Households, % of total based on weighted average gross impressions across Texas DMAs

How Texans are Streaming

Nielsen's "The Gauge" Tells the Complete Story

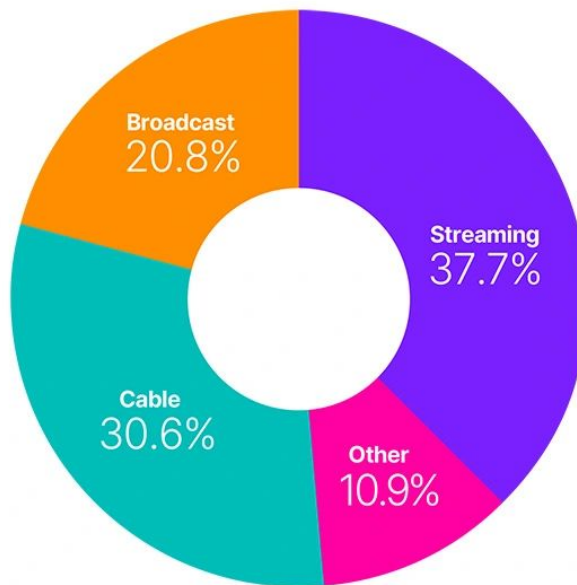


Ad-Supported Video vs. Non-Ad-Supported Video



June 2023

Total Day | Persons 2+



Source: Analysis of June 2023 (05/29/2023 - 06/25/2023), Nielsen National TV Panel Data augmented by Streaming Platform Ratings

The Streaming Meter



Identify

Uniquely identifies internet streaming activity to the television








Detect

Detects total streaming by provider (Netflix, Hulu, Amazon, YouTube, etc.)

Credit

Records total streaming (and separates non-streaming) by hardware source (Smart TV, Apple TV, Roku, Xbox, etc.)

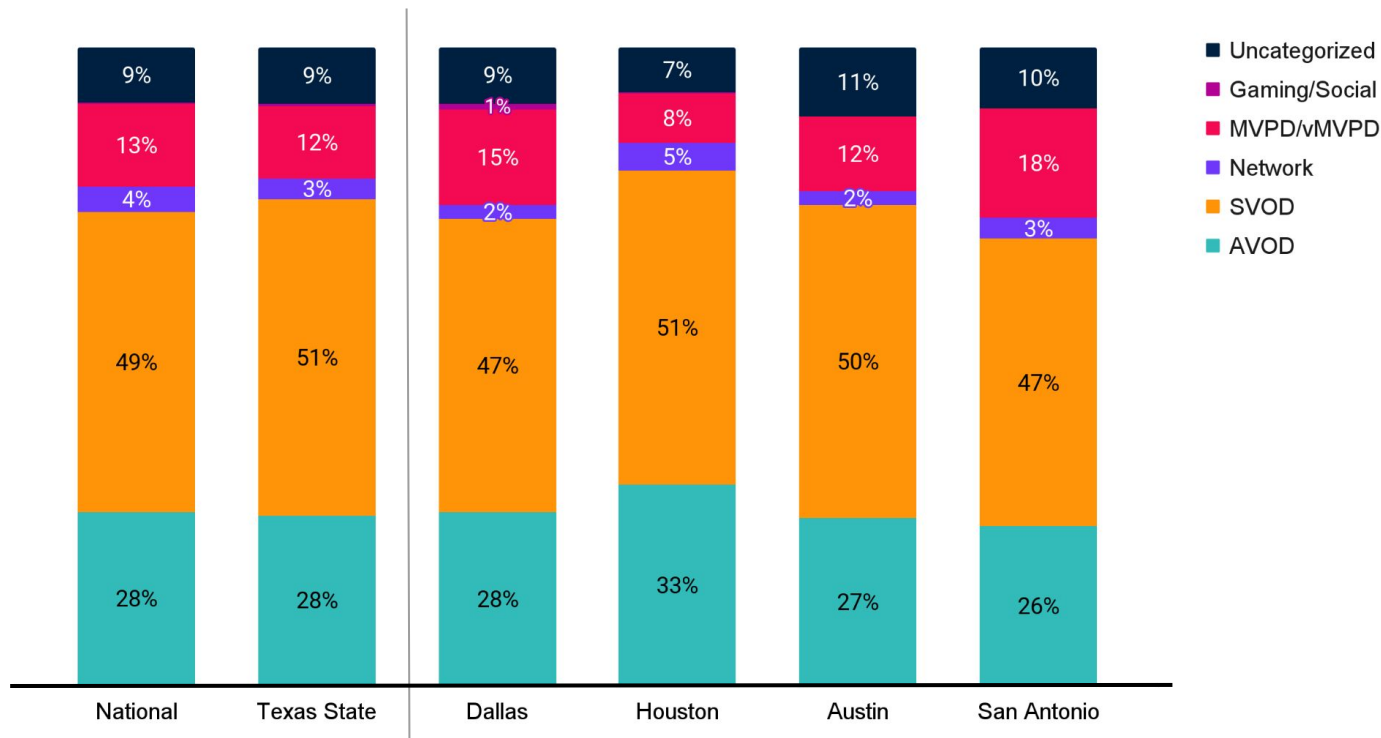
With App Category Level Reporting

SVOD APPS	AVOD APPS	MVPD/vMVPD APPS	NETWORK APPS	SOCIAL APPS	GAMING APPS	UNCATEGORIZED APPS
						
e.g. Netflix, Amazon, Hulu, Disney+, Peacock, Paramount+	e.g. YouTube, Tubi, Pluto TV and The Roku Channel	MVPD e.g. Xfinity app, Charter/Spectrum app vMVPD e.g. Sling TV, DirecTV Stream	e.g. ABC, NBC, AMC, Bravo, MTV	e.g. Facebook, TikTok	e.g. Twitch, 2K Sports	e.g. iTunes, Vimeo

SVOD and AVOD are top streaming categories



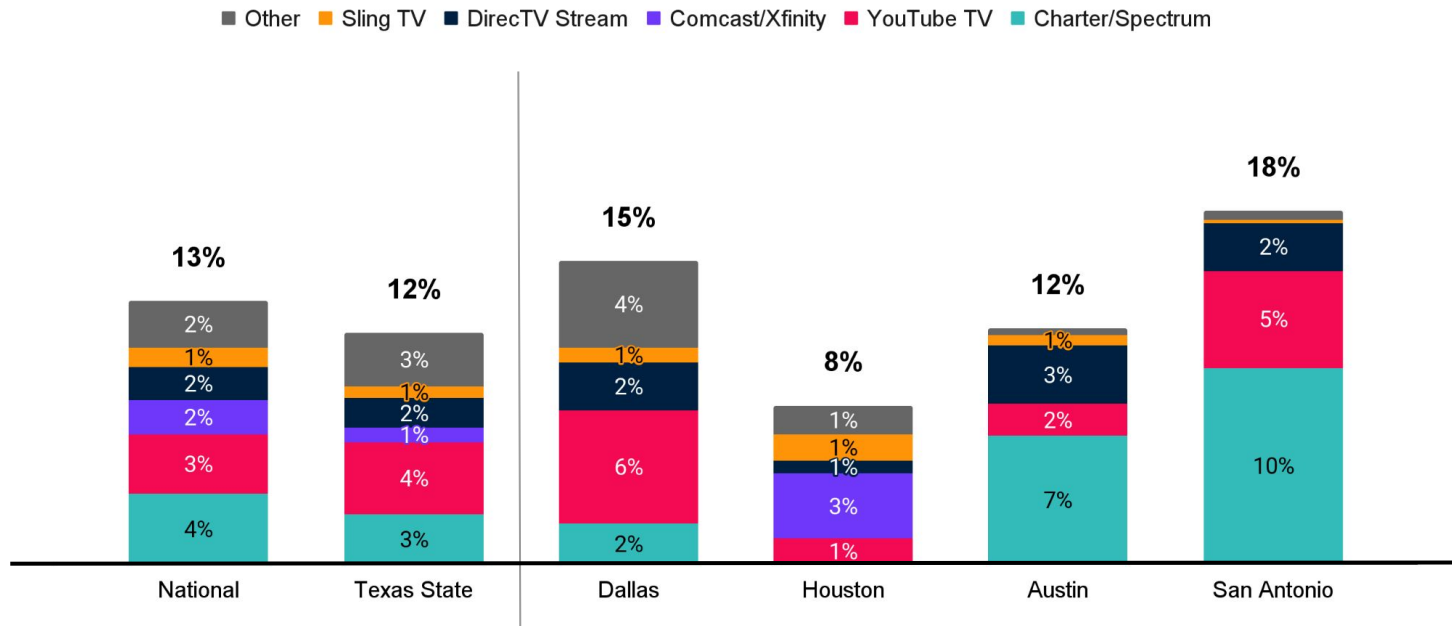
Share of streaming app categories, May 2023, Persons 2+



San Antonio leads usage among MVPD/vMVPDs



MVPD/vMVPD streaming, May 2023, Persons 2+



Source: Nielsen NPOWER, Streaming Platform Ratings, May 2023 (04/27/2023-05/24/2023), Live+7, Total Day, Persons 2+

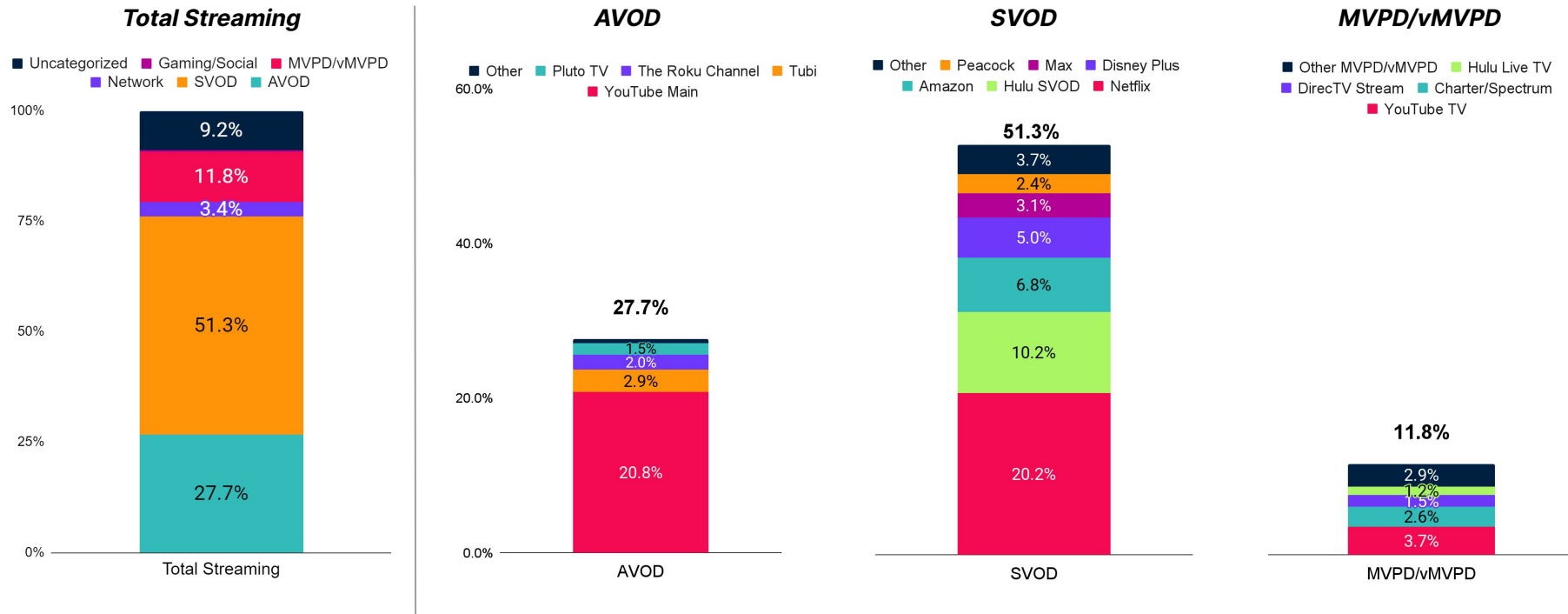
Other MVPD/vMVPD includes Cox, Fubo TV, Frndly, Hulu Live TV, Philo

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Netflix and YouTube are the most watched apps in Texas



Share of Total Streaming by provider, May 2023, Persons 2+



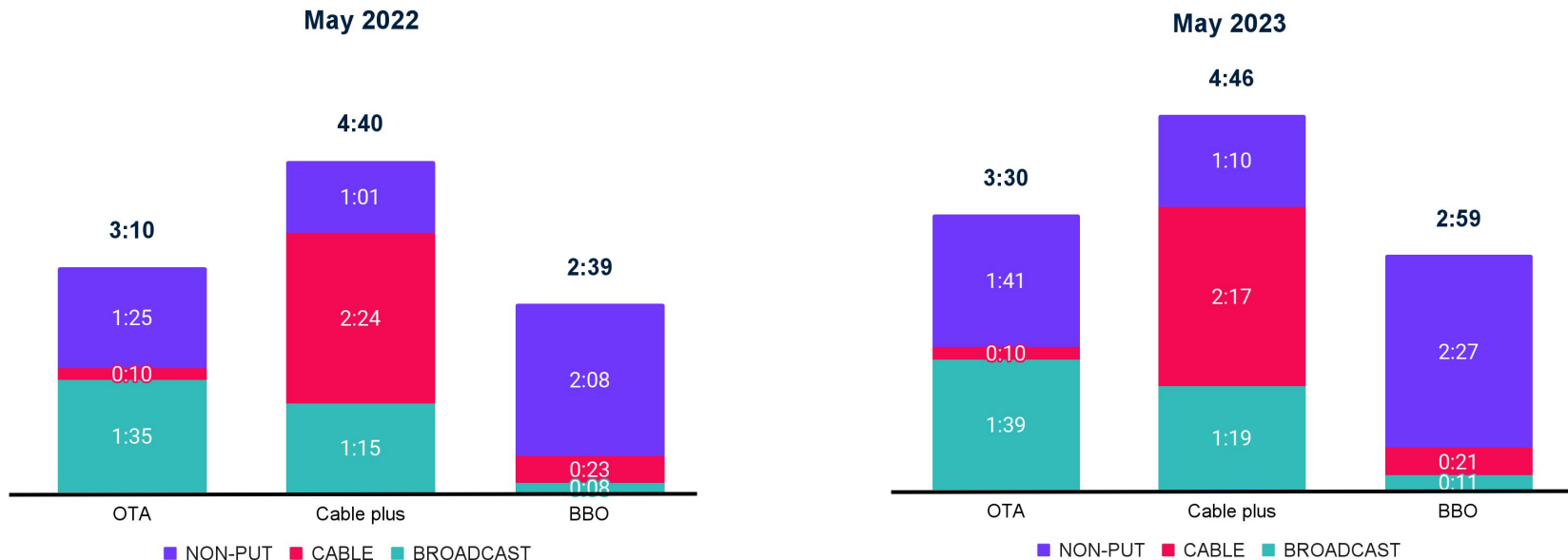
Source: Nielsen NPOWER, Texas State Market Break, Streaming Platform Ratings, May 2023 (04/27/2023-05/24/2023), Live+7, Total Day, Persons 2+
 Other SVOD includes Apple TV Plus, Discovery Plus, ESPN, Paramount Plus. Other MVPD/vMVPD includes Comcast/Xfinity, Frndly, Fubo TV, Philo, Sling TV
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Streaming happens in all types of households



In OTA HHs, Broadcast TV remains dominant

Texas daily time spent with TV Persons 18+ (HH:MM)



Source: Nielsen NPOWER, Total day, Persons 18+, Live+SD, Texas state market break

SVOD continues to grow across platforms

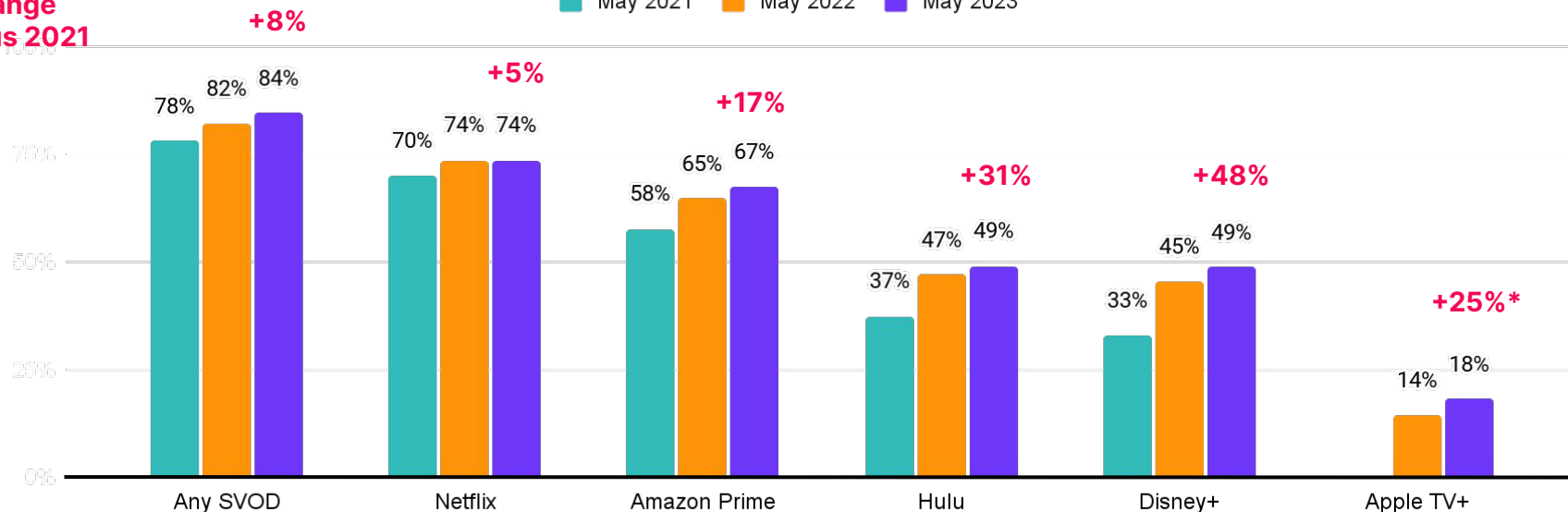


Hulu and Disney+ still growing

Trend of SVOD Penetration in Total U.S.

% change
versus 2021

■ May 2021 ■ May 2022 ■ May 2023



Source: Nielsen NPOWER based on Composite scaled installed, Households, *versus 2022



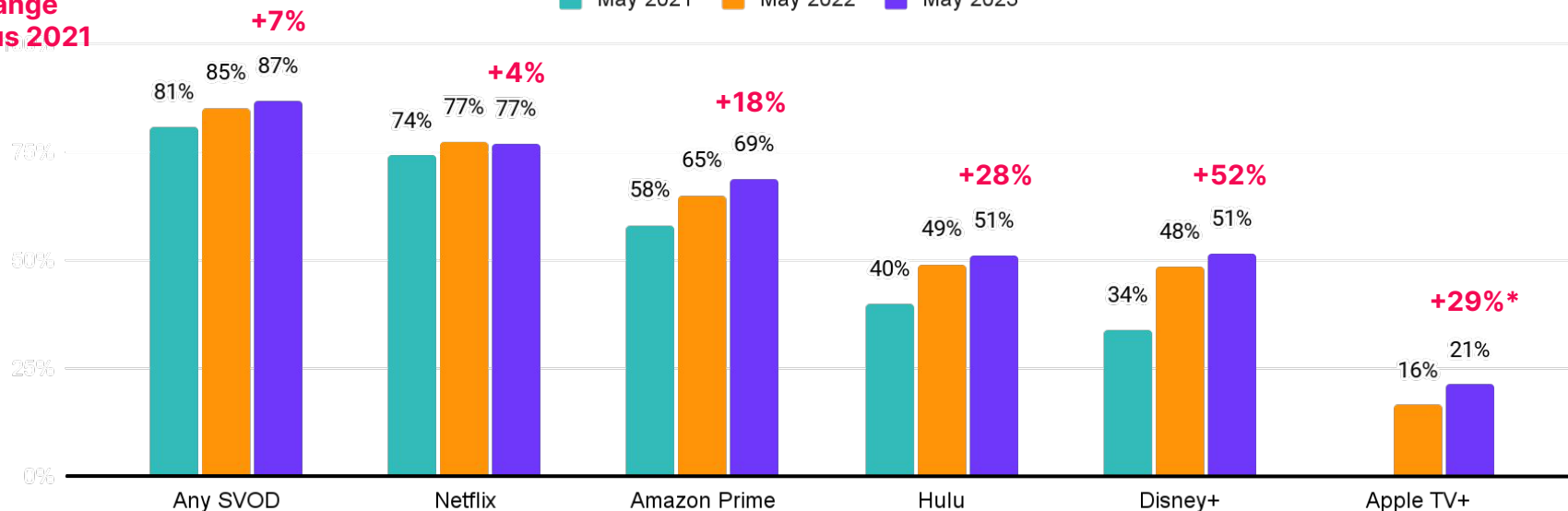
SVOD continues to grow across platforms

Growth of homes with SVOD platforms align with National

Trend of SVOD Penetration in Texas

% change
versus 2021

■ May 2021 ■ May 2022 ■ May 2023

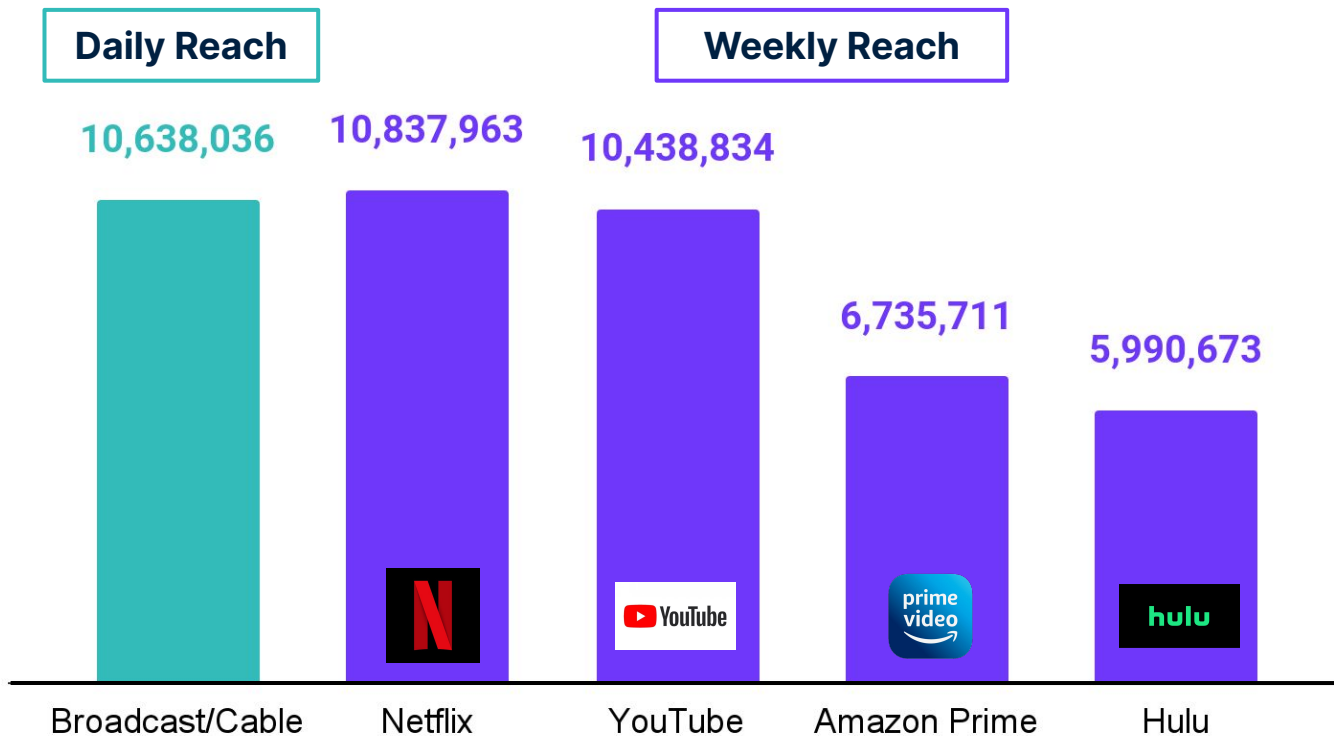


Source: Nielsen NPOWER based on average installed of Texas market break, Households, *versus 2022

Linear Reach is unmatched in the ad-supported world



Broadcast and Cable reach more Texans 18+ *in a DAY* than YouTube does *in a WEEK!*



Source: TV Reach: Nielsen NPOWER May 2023, U.S. State = Texas, Adults 18+; Streaming Services: Nielsen Scarborough, Latest survey available for 19 Texas DMAs, Adults 18+

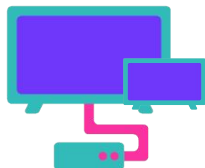
Measuring Local OTT Feeds

Measuring Local Non-Linear Content

Local OTT Feeds

Local Content *without* Linear Ads

OTT video on station app or
website streamed on a TV set in
home or out-of-home



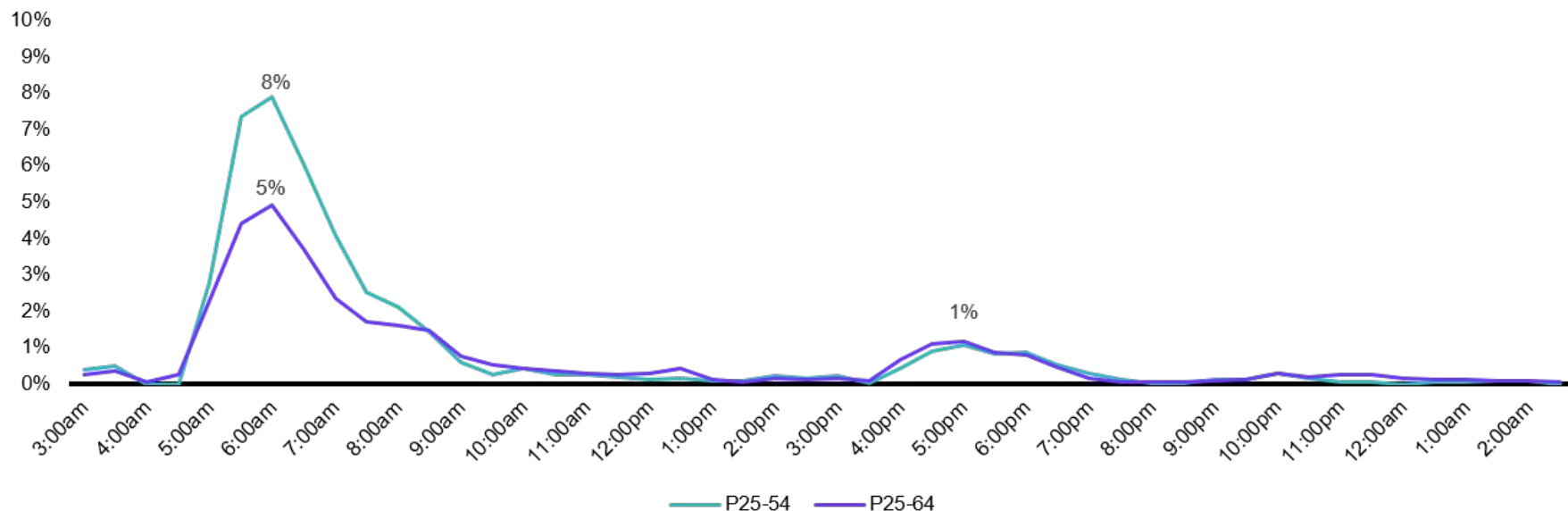
Nielsen Measures With:

Persons Driven Panels



Local OTT Provides PUT Increases During News Time Periods

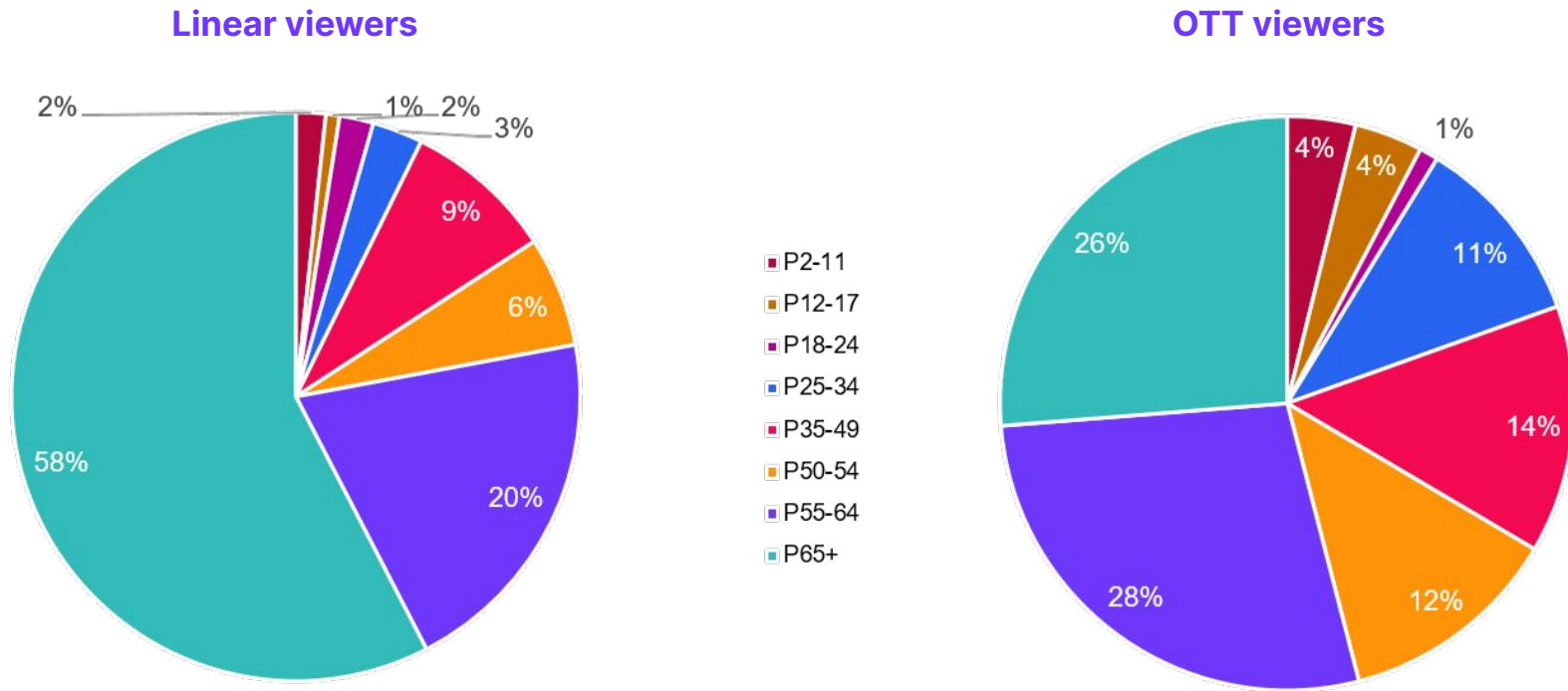
ORLANDO BIG 4 Dec 2022: 6-8% lift in P25-54 PUT during the M-F 6-7a news;
increases seen during 4-7p time period



Source: NLTV Dec'22, Percentage of PUT to Orlando DAI Stations, M-F 3a-3a

Local OTT Viewers Are Younger Than Traditional Viewers

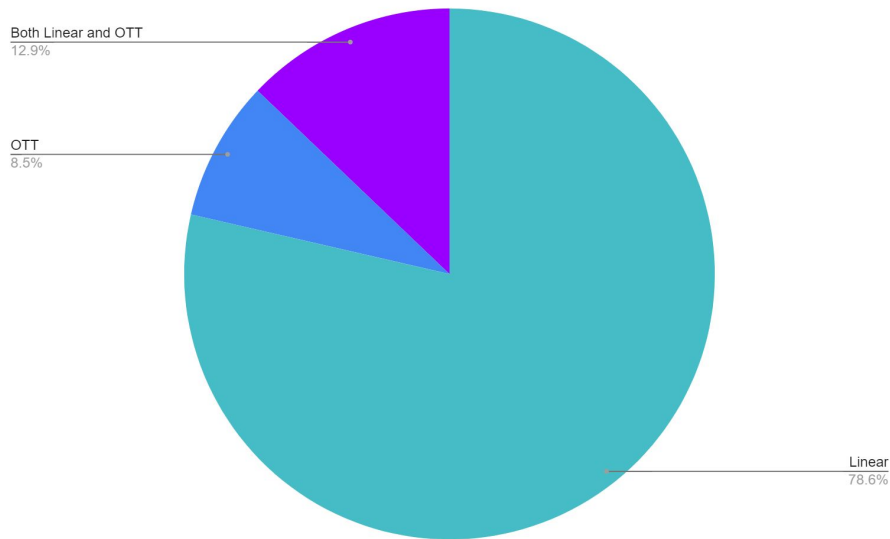
Dec 2022: Mon-Fri Total Day Demo Composition based on impressions



Source: NLTV Dec'22, Share of total impressions to Orlando traditional and DAI stations, M-F 3a-3a

60% Of P25-54 OTT Viewers Also Watch Traditional Local News

Orlando Persons 25-54 Linear/OTT Reach Comparison



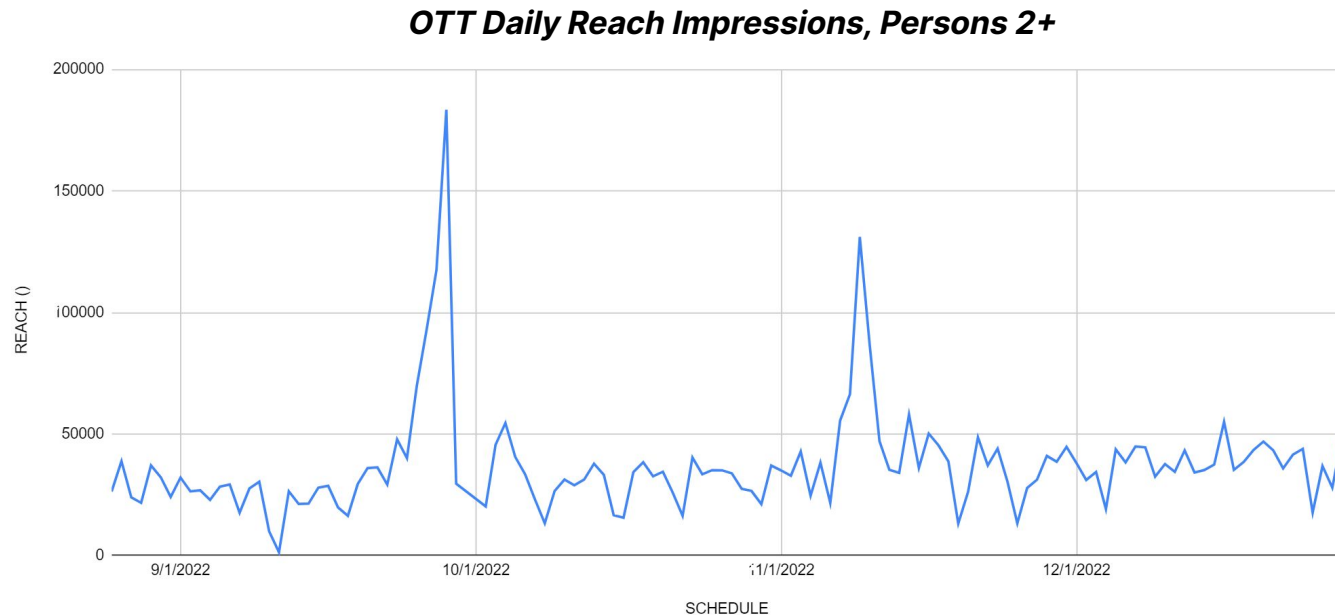
12.3% of Orlando P25-54 watched Local News on an OTT feed

Reach Schedule (Demo: Adults 25-54)	REACH %	REACH
Local News Reach - Linear	52.6	874,118
Local News Reach - OTT	12.3	204,476
Combined Reach	57.5	955,611
Watch Linear Only	45.2	751,135
Watch OTT Only	4.9	81,494
Watch Both Linear and OTT	7.4	122,983

Source: NLTV Reach OOB Orlando DAI Pilot Total Day Reach, Traditional Mon-Fri Local News Program Reach; Sep22-Feb23

Significant Weather Events Bring Viewers To Local OTT

During run-up to Hurricane Ian, daily reach among OTT feeds in Orlando ***grew to over 175,000*** among Persons 2+



Source: NLTV Sep22-Dec22; Daily Reach to Orlando DAI Stations. MF 3a-3a

Moving Measurement Into the Future

Local TV Enhancements



Big Data Announcement

Multi-Year agreement to use Vizio Inscape Smart TV data in Nielsen local markets

****Comcast announced 7/31/2023***

Measuring DAI Feeds

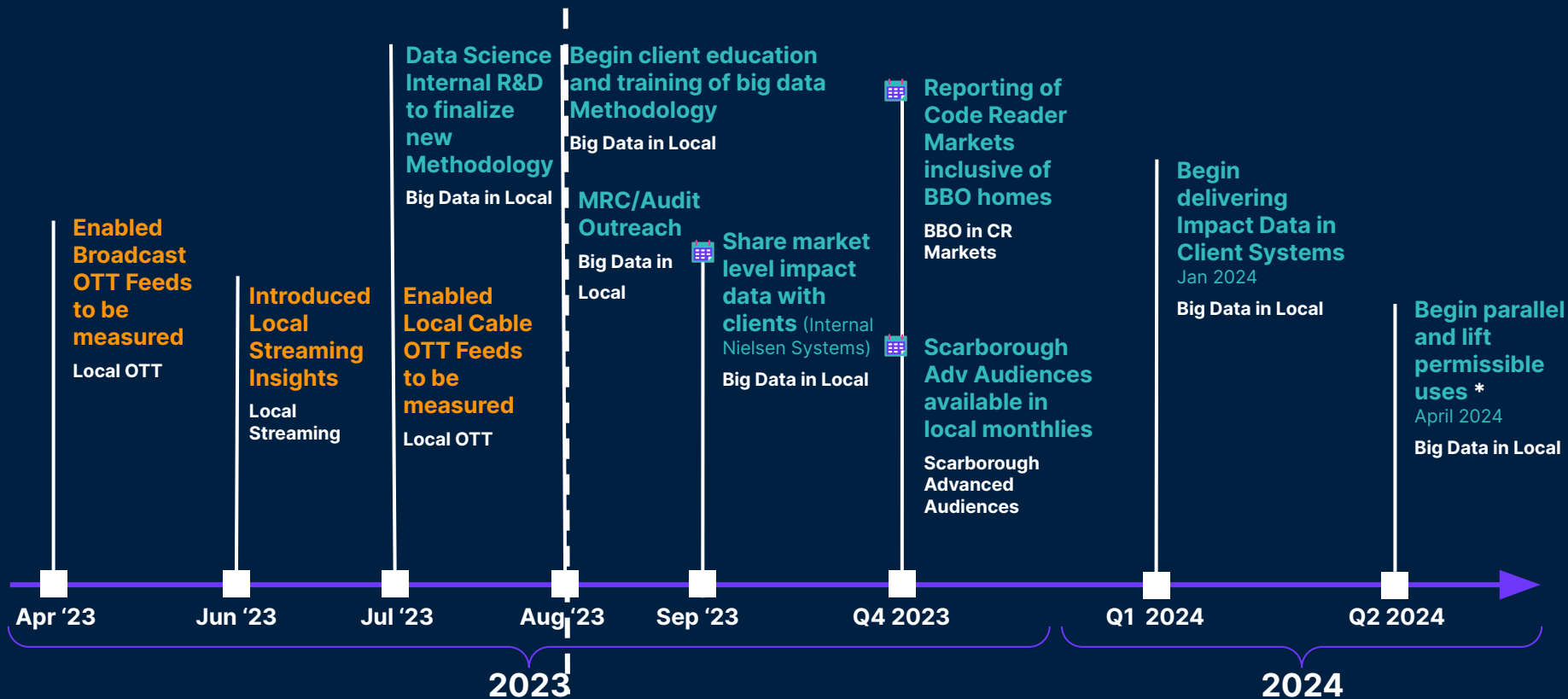
Work completed to measure station OTT app/website feeds

Streaming Meter and Wearables

More than 22K streaming meters installed in LPM/SM markets

Wearables deployed in PPM markets

Local TV Measurement Roadmap 2023/2024



Work Completed Planned Work Tentative Timing

Big Data Integration in Local



Addition of **RPD (DirecTV, Dish, Charter, Comcast)** and **ACR (Vizio)** data to LPM+PPM and SM+PPM markets

ACR in second phase

Q3 2023

Internal Evaluation Data
for Single LPM/PPM
Market

Note: Not in SSPs or NLTV

Q4 2023

Evaluation Data becomes
available

Not in client systems

Q1 2024

Impact Data becomes
available

In client systems



How Nielsen Measures OTT Feeds

Example Nielsen Crediting Setup

