



## **Sheltering in Place Pushes Streaming to New Heights in Local Markets During COVID-19**

It's been more than a month since COVID-19 transformed daily lives across the U.S. With the workforce moving almost entirely remote, and more states issuing stay-at-home orders, many Americans stuck at home turned to streaming content to fill their time. New Nielsen data shows that streaming trends varied across markets, age groups and times of day during the first month of living restrictions in the U.S.

The consumption of non-linear content via internet-connected devices such as smart TVs, and various devices connected to the TV that give the ability to stream content, continued to rise week after week, hitting its peak the week of March 23, 2020. Top markets, specifically New York and Chicago, both saw dramatic increases in streaming consumption of more than 74% between the weeks of March 2 and March 23.

In terms of connected device streaming ratings, week to week, heavy streaming markets such as Orlando, Milwaukee and Norfolk remain among the top markets, while others, previously ranked outside the top fifteen, made sizable gains week to week. Chicago and Denver have risen in the ranks moving from 17 and 21, to 5 and 10, respectively.



## INTERNET CONNECTED DEVICE USAGE TOP-RANK GAINING MARKETS WEEK OF 3/23 VS. WEEK OF 3/2

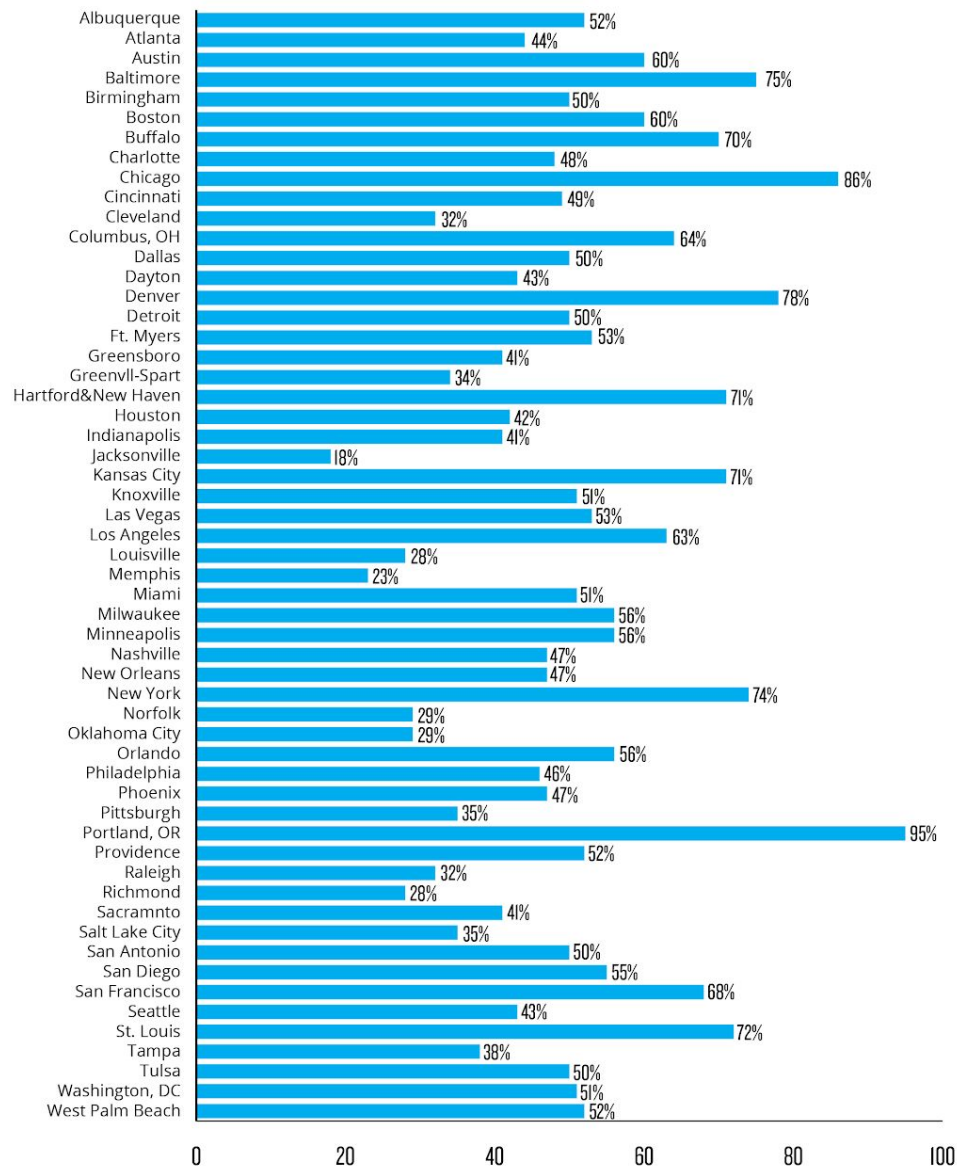
MARKET TYPE	GEOGRAPHY	WK OF 3/2	WK OF 3/23	RANK WK OF 3/2	RANK WK OF 3/23	RANK CHANGE
LPM	CHICAGO	3.44	6.41	17	5	+12
	DENVER	3.34	5.93	21	10	+11
	SAN FRANCISCO	3.33	5.61	22	13	+9
	ST. LOUIS	3.65	6.28	15	6	+9
	NEW YORK	3.36	5.84	20	12	+8
SET-METER	LAS VEGAS	3.39	5.18	25	17	+8
	BUFFALO	4.01	6.81	8	2	+6
	PROVIDENCE	3.56	5.40	19	13	+6
	KNOXVILLE	3.56	5.39	19	14	+5
	NASHVILLE	3.53	5.19	21	16	+5

Source: Live+SD, M-Su 4a-1a Data provided is exclusive to People Meter and Set-Meter homes. Data represents full DMA coverage in the above DMAs. Internet Connected Device Usage (any non-linear video from a connected device or enabled Smart TV)

Copyright © 2020 The Nielsen Company (US), LLC. All Rights Reserved.



## P25-54 INTERNET CONNECTED DEVICE USAGE-WEEK OF 3/23 VS. WEEK OF 3/2 DIFF



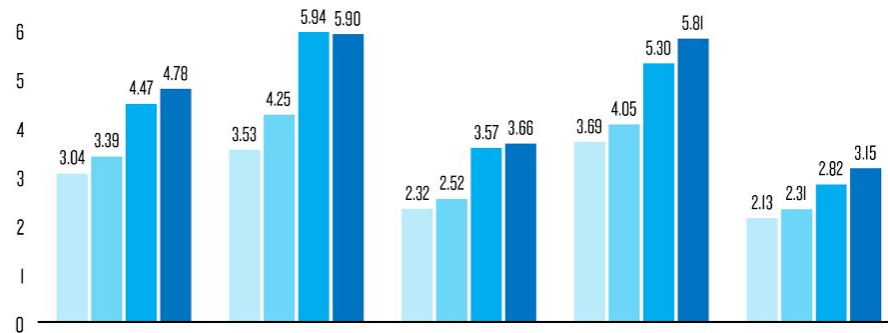
Source: Live+SD, M-Su 4a-1a Data provided is exclusive to People Meter and Set-Meter homes. Data represents full DMA coverage in the above DMAs. Internet Connected Device Usage (any non-linear video from a connected device or enabled Smart TV)



Compared to the week of March 2, streaming of non-linear content is up across demographics in Nielsen's 56 largest metered markets. Among persons 2+, streaming increases 57% in LPM markets and 46% in Set-Meter markets. Persons 25-54 show similar gains. Perhaps not surprisingly, younger demographics see the largest growth with over 60% increases from the week of March 2 across all markets.



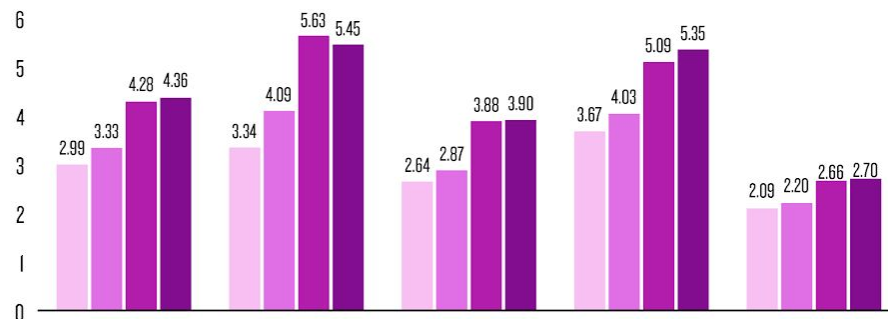
## LPM MARKETS



DEMO	P2+	P2-17	P18-24	P25-54	P55+
WK OF 3/23 VS. WK OF 3/2 DIFF	1.74	2.37	1.34	2.12	1.02
WK OF 3/23 VS. WK OF 3/2 %DIFF	57%	67%	58%	57%	48%

■ WK OF 3/2 
 ■ WK OF 3/9 
 ■ WK OF 3/16 
 ■ WK OF 3/23

## SET-METER MARKETS



DEMO	P2+	P2-17	P18-24	P25-54	P55+
WK OF 3/23 VS. WK OF 3/2 DIFF	1.37	2.11	1.26	1.68	0.61
WK OF 3/23 VS. WK OF 3/2 %DIFF	46%	63%	48%	46%	29%

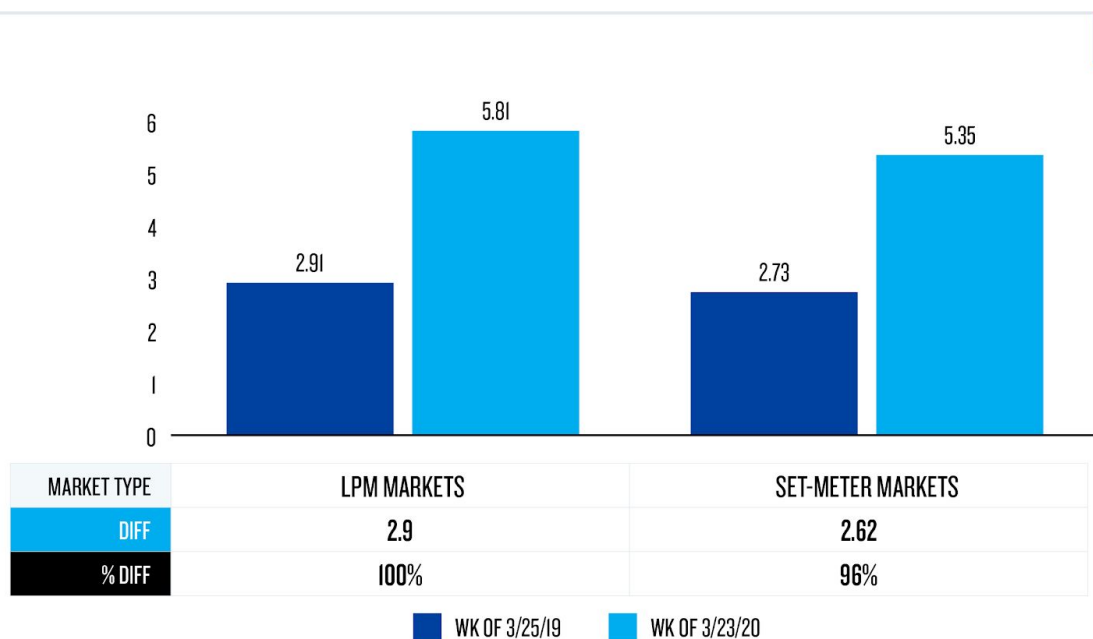
■ WK OF 3/2 
 ■ WK OF 3/9 
 ■ WK OF 3/16 
 ■ WK OF 3/23

Live+SD, M-Su 4a-1a weighted average across 25 LPM +PPM markets, 19 SM+PPM+NPM and 12 SM+RPD+NPM markets. (Data provided is exclusive to People Meter and Set-Meter homes. Data represents full DMA coverage.) Internet-Connected Device Usage (any non-linear video from a connected device or enabled Smart TV)



While we have seen organic streaming growth over the past few months as new services such as Disney+ hit the marketplace, lifestyle changes resulting from the COVID-19 outbreak have accelerated growth as consumers find themselves with more time in front of the TV glass. In addition to searching for new video entertainment content, other categories such as fitness and wellness, gaming live streams, and cooking are all likely to be contributing to connected device streaming gains.

Looking at streaming in local markets through a year-over-year lens, comparing the week of March 23, 2020 to the same week a year ago, we see almost 100% growth in streaming among P25-54.



Source: Live+SD, M-Su 4a-1a Weighted Average across 25 LPM +PPM markets, 19 SM+PPM+NPM and 12 SM+RPD+NPM markets. (Data provided is exclusive to People Meter and Set-Meter homes. Data represents full DMA coverage.) Internet Connected Device Usage (any non-linear video from a connected device or enabled Smart TV)

Copyright © 2020 The Nielsen Company (US), LLC. All Rights Reserved.

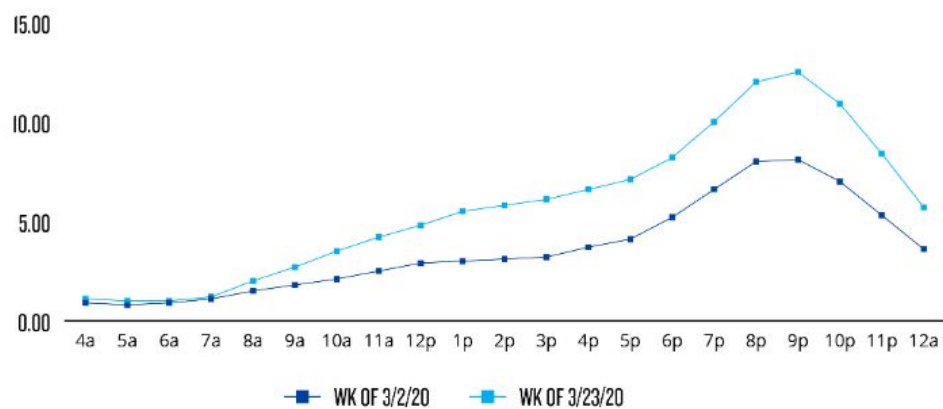
Time of day matters, too. While streaming increases are persistent across all hours of the day, the most significant gains are in the early afternoon hours. Historically, few adults would have



been home during these hours, but given the current climate, we see over 50% increases in streaming from 1pm-4pm across markets.



### LPM MARKETS - P25-24



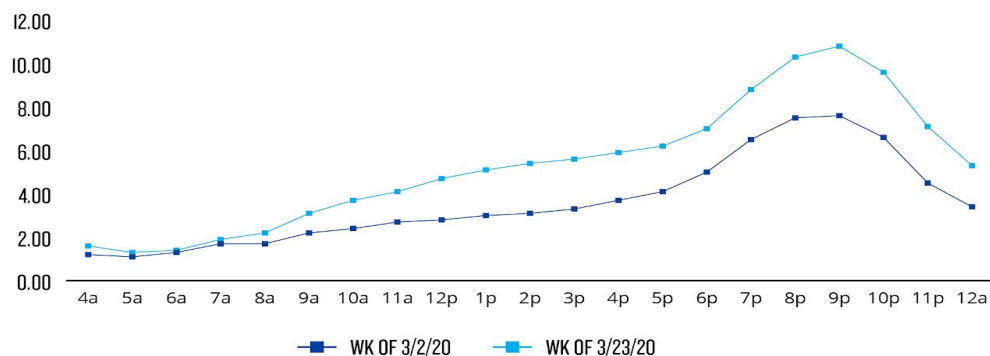
4A	5A	6A	7A	8A	9A	10A	11A	12P	1P	2P	3P	4P	5P	6P	7P	8P	9P	10P	11P	12A
33%	29%	13%	13%	32%	42%	59%	72%	76%	81%	81%	87%	74%	65%	55%	50%	47%	49%	52%	61%	59%

Source: Live+SD, M-Su 4a-1a by hour Weighted Average across 25 LPM +PPM markets, 19 SM+PPM+NPM and 12 SM+RPD+NPM markets. (Data provided is exclusive to People Meter and Set-Meter homes. Data represents full DMA coverage.) Internet-Connected Device Usage (any non-linear video from a connected device or enabled Smart TV).

Copyright © 2020 The Nielsen Company (US), LLC. All Rights Reserved.



## SET METER MARKETS



4A	5A	6A	7A	8A	9A	10A	11A	12P	1P	2P	3P	4P	5P	6P	7P	8P	9P	10P	11P	12A
22%	17%	9%	13%	32%	43%	52%	55%	61%	67%	67%	66%	56%	47%	39%	36%	37%	42%	45%	56%	55%

Source: Live+SD, M-Su 4a-1a by hour Weighted Average across 25 LPM +PPM markets, 19 SM+PPM+NPM and 12 SM+RPD+NPM markets. (Data provided is exclusive to People Meter and Set-Meter homes. Data represents full DMA coverage.) Internet Connected Device Usage (any non-linear video from a connected device or enabled Smart TV)

Copyright © 2020 The Nielsen Company (US), LLC. All Rights Reserved.

By understanding where, when and who is watching content across streaming platforms, the media industry as a whole will be positioned to connect with viewers. With some states having recently extended their stay-at-home orders for another month and others announcing plans to lift restrictions soon, we'll continue to monitor the impact of COVID-19 on viewing habits.