



MILLENNIALS ON MILLENNIALS

TV AND DIGITAL NEWS CONSUMPTION



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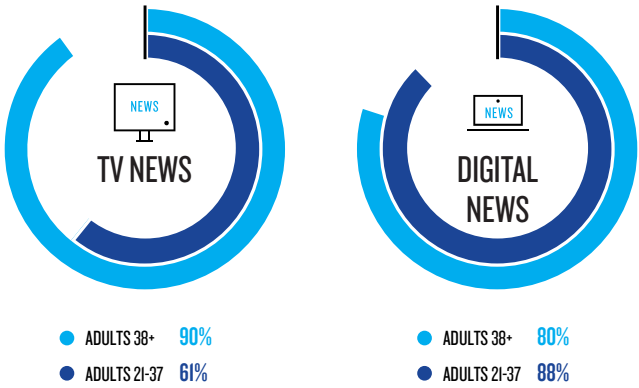
If only there was more time in a day. But if there was, chances are pretty high that we'd be using it to consume more media. After all, there's only 24 hours in a day, and our media diets continue to expand. In looking at trends this year, U.S. adults currently spend 11+ hours daily with media, and that's up from what we saw a year ago.

Yet amid the cornucopia of media available to us, there's no mistaking consumer appetites for news—perhaps the one option that we tap into most regularly to stay informed about everything happening in the world around us. And not surprisingly, our news appetite continues to grow in step with overall media consumption.

Unlike some media, news is content that just about everyone seeks out—and regularly. Notably, however, different generations seek out the news from different sources. Compared with their older counterparts, Millennials, defined in this report as adults 21-37, get more news from digital and mobile sources. For example, national TV news (broadcast and cable) has a monthly reach of 90% among adults 38 and older. Among the coveted Millennial generation, however, that reach drops to 61%.

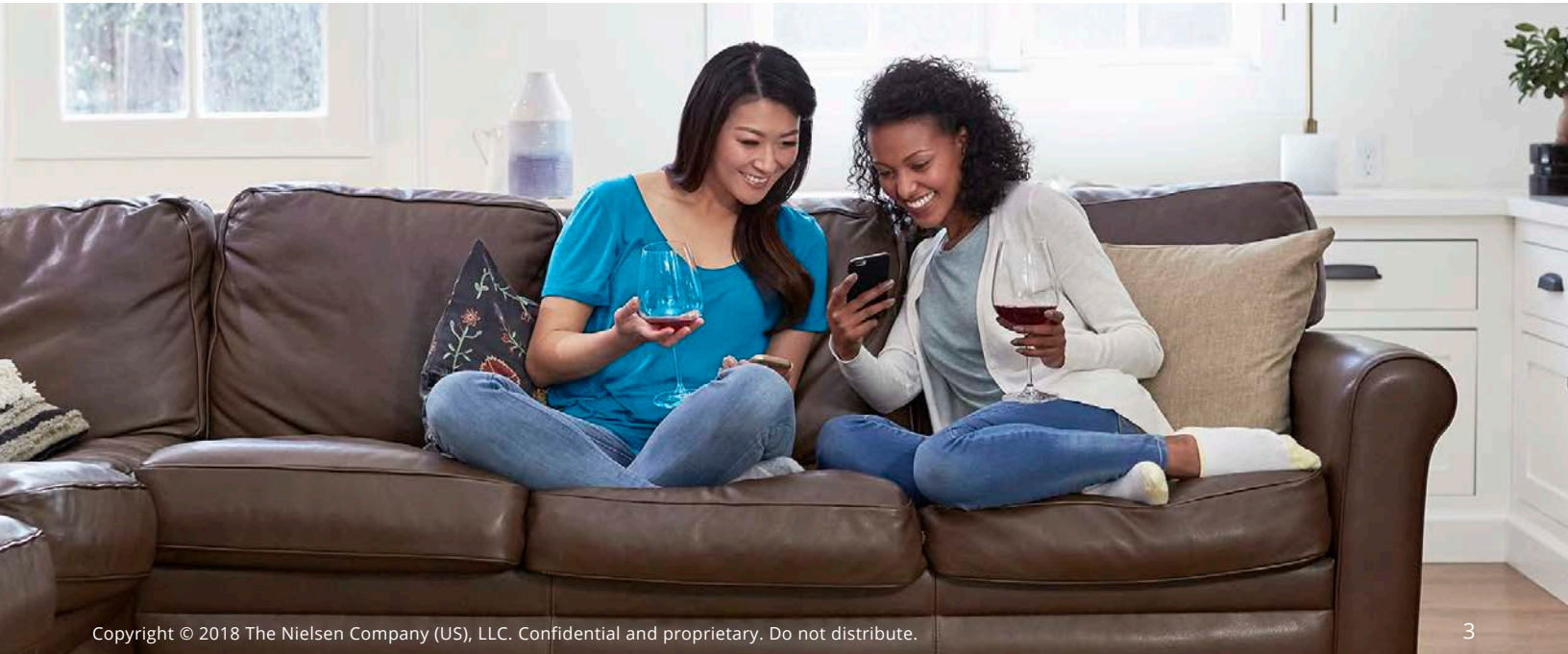
WHERE MILLENNIALS GET THEIR NEWS

Monthly Reach Percentage



Source: Nielsen Media Impact, Total Media Fusion, December 2017; total reach percentage TV news is defined as national broadcast and cable.

In this report, we explore news consumption among U.S. Millennials, the “it” demographic among marketers around the globe because of their size as a cohort and their growing spending prowess. We focus primarily on national TV news and digital news within this report, as those are the highest reaching mediums of news consumption among both Millennials and adults 38+.





MILLENNIALS LIVE DIGITALLY AND ON MOBILE

Across age groups, Millennials are among the most mobile media consumers. On average, U.S. adults 18 and older spend 43% of their daily media time with live + time-shifted TV¹. Comparatively, that percentage drops to 26% among consumers 18-34. This group tends to spend more time accessing web and app content with their smartphones, as app/web usage accounts for 29% of their daily media time, well above the 21% that adults 18 and older spend.

It is worth noting, however, that younger generations spend less time with media per day overall than the average adult (8 hours, 45 minutes vs. 11 hours, 6 minutes). But spending less time with media doesn't mean Millennials are any less focused on the news—it just means that news producers have to make sure they make the most out of the time Millennials are willing to offer up.

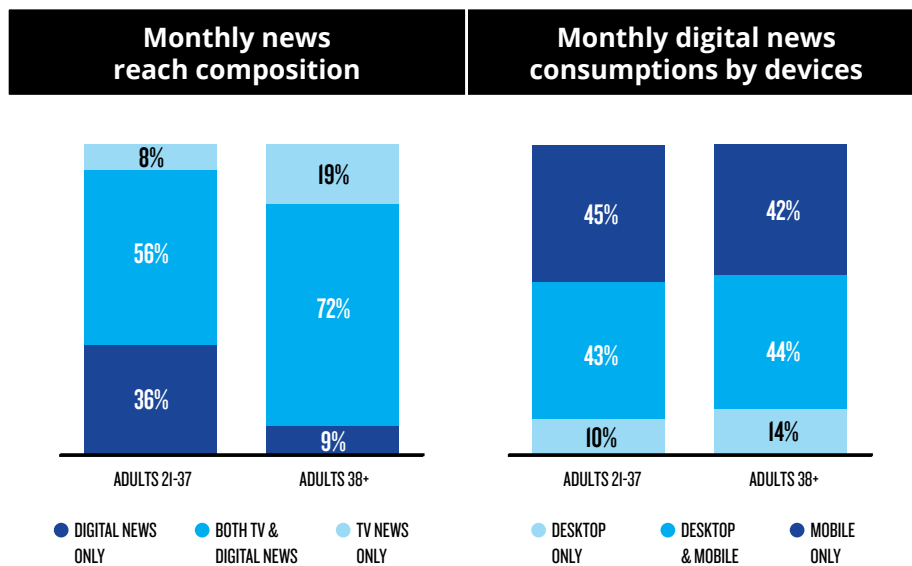
When we look at the platforms and channels that Millennials are spending the most time, it becomes clear where they're consuming the most news. Given the ubiquity of smartphones and growth in content consumption across tablets over the past year, it's no surprise that digital and mobile are key for news consumption among Millennials.

¹ Q1 2018 Nielsen Total Audience Report

In looking at monthly consumption of traditional TV and digital news, we see that consumption of TV only news among adults 38 and older is twice that of Millennials. And digital only news consumption among Millennials is 4x higher than adults 38 and older. But when it comes to platform of choice, the desire to be mobile and access content whenever and wherever possible is relatively consistent across demographics.

MILLENNIALS ARE HEAVY DIGITAL VIDEO NEWS CONSUMERS

STAYING IN THE KNOW... ON THE GO



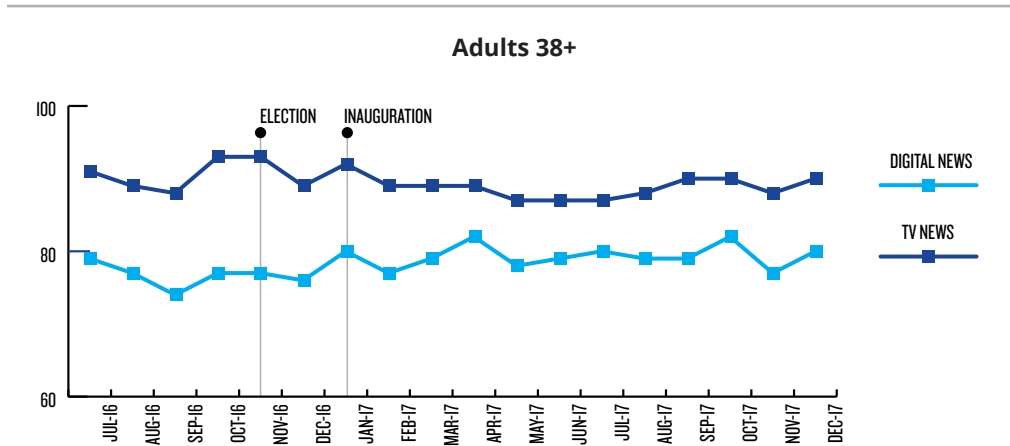
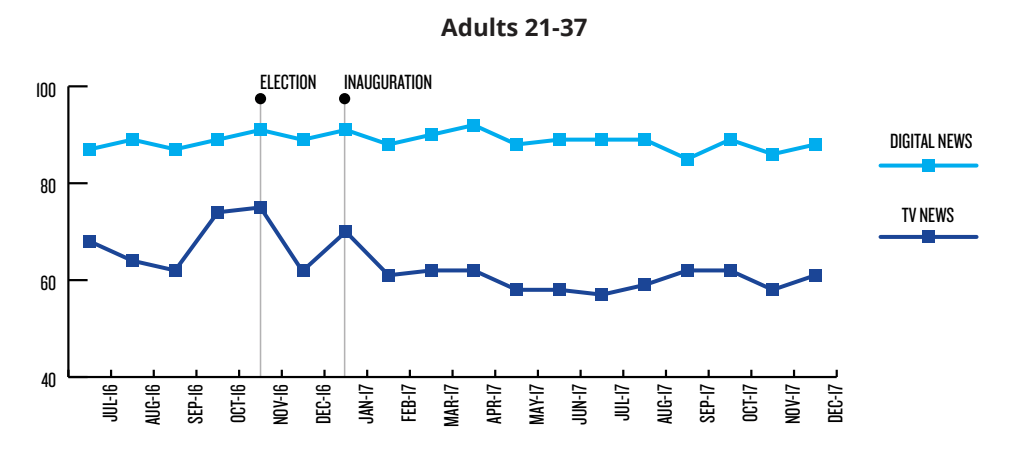
Source: Nielsen Media Impact, Total Media Fusion, December 2017, total day. TV news is defined as national broadcast and cable.

Despite the fact that total digital news reach each month is relatively equal across demographics, digital only news is significantly higher among Millennials than adults 38 and older month over month. As you might

expect, the trended reach of national TV news among adults 38 and older is higher than Millennials. The other point worth noting is that while total monthly reach of digital news among Millennials hovered around 90% between July 2016 and December 2017, the reach of national TV news dropped from 68% to 61% during that same period

DIGITAL NEWS HAS A MUCH HIGHER TRENDED REACH AMONG MILLENNIALS

Trended total monthly reach



Source: Nielsen Media Impact, Total Media Fusion, total reach percentage. TV news is defined as national broadcast and cable.

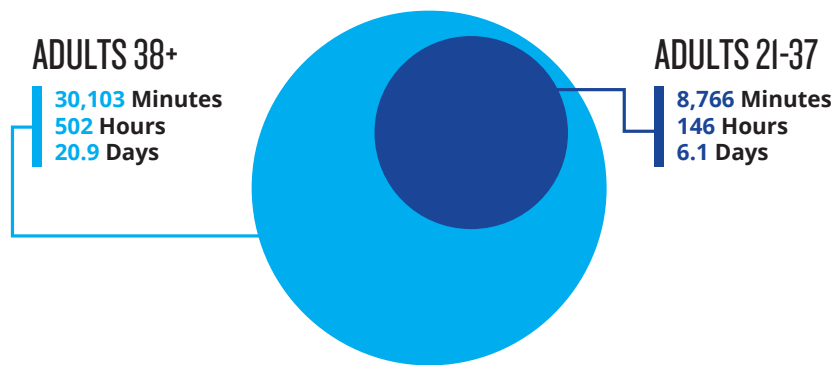


MILLENNIALS ARE TIME-CONSCIOUS NEWS CONSUMERS

On a monthly basis, national TV and digital news reach among Millennials 21-37 is high at 95%. However, as noted earlier, younger generations spend quite a bit less time each day with media than older generations do. For example, compared with the 8 hours, 45 minutes that 18-34-year-olds spend per day, consumers 35 and older spend 12 hours and 5 minutes per day with media². So as a result, Millennials 21-37 spend significantly less time with TV and digital news than adults 38 and older.

NEWS CONSUMPTION TIME SPENT

TV + Digital News, Total Annual Minutes per News Consumers

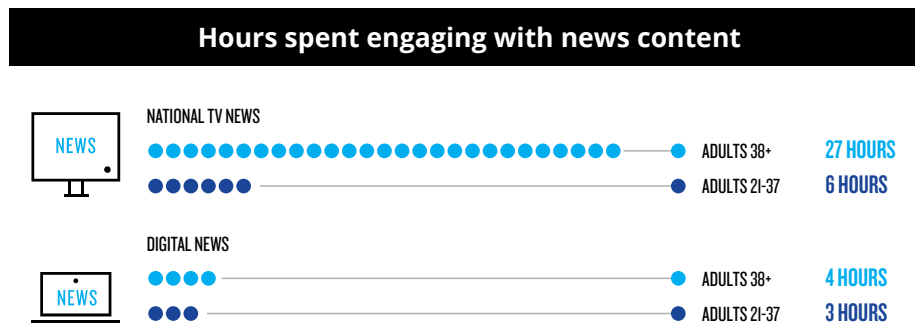


Source: Nielsen Media Impact, Total Media Fusion. TV news is defined as national broadcast and cable.

² Q1 2018 Nielsen Total Audience Report

By looking at national TV and digital news consumption individually, we can see just how digitally focused Millennials are. While people 38 and older spend almost an hour (54 minutes) each day watching TV news, Millennials spend an average of just 12 minutes with TV news each day. Comparatively, digital news consumption between these two groups is more evenly matched.

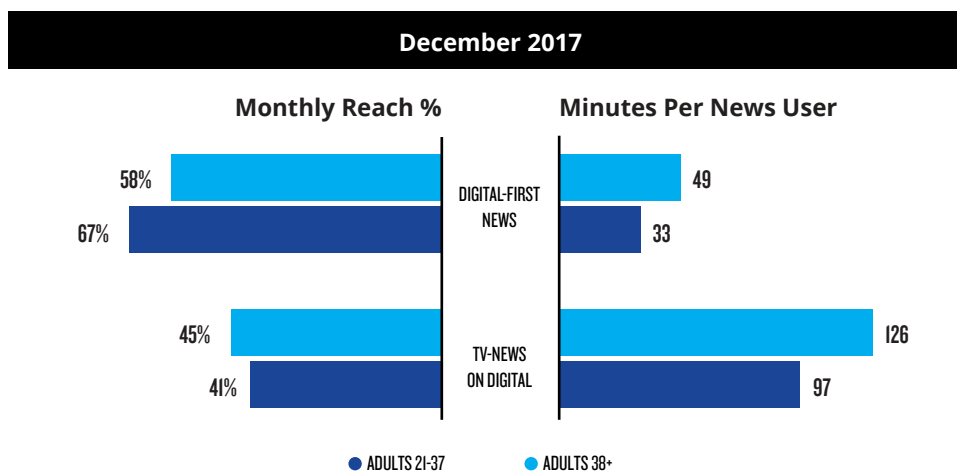
MONTHLY TIME SPENT WITH TV AND DIGITAL NEWS



Source: Nielsen Media Impact, Total Media Fusion, total day, December 2017. TV news is defined as national broadcast and cable.

In looking at digital-first and TV news on digital consumption, we see that higher reach doesn't guarantee lengthy engagement. Notably, the reach of digital-first news among both generations is higher than TV news on digital, yet both groups of consumers spend significantly less time with digital-first news than with TV news on digital.

REACH AND TIME SPENT WITH DIGITAL NEWS



Source: Nielsen Media Impact, Total Media Fusion, total day, December 2017. TV news is defined as national broadcast and cable.





DIGITAL-FIRST NEWS IS A PREFERRED NEWS FORMAT ACROSS GENERATIONS

Understanding how much time Millennials spend with news and on which platform is only part of the insight needed in order to reach them effectively. It's also critical to know what formats they engage with, when they consume news content, the sources they look to for information, as well as the scope of the news they're interested in.

For example, research from an online controlled exposure test³ conducted at the Nielsen Media Lab found that overall, Millennials are more likely than consumers 38 and older to keep an open mind, but they also pay less attention. Millennials have a slightly lower political IQ, but they're much more likely to share content and act based on what they learn.

Despite the fact that they pay less attention, Millennials stay focused when they engage with late-night programming, which garners the highest degree of comprehension among this generation. Millennials feel that late-night programs provide new information and increase their knowledge on topics they're engaged with. Compared with people 38-64, Millennials score higher in trust and excitement around the news they consume during these late-night shows.

When it comes to broadcast and cable news, adults 38-64 are the primary audiences. Notably, this group is particularly likely to trust cable news, whereas Millennials' comprehension for cable news is lower. The younger consumers do, however, find cable news information trustworthy. Comparatively, adults 38-64 feel less connection with broadcast news, but their comprehension of the information conveyed is higher than cable news.

³ This data comes from a controlled exposure study leveraging the Nielsen Media Lab to better understand hard to measure differences between several categories of news programming. Each news category had five 10-minute long clips of their typical content, except cable news which had 15 clips.

Notably, research from the Nielsen Media Lab found that the digital-first news format significantly outperformed other formats across all key metrics. Comprehension scores were even among Millennials and people 38-64, and the format had the same impact on changing opinions among both age groups. And among Millennials, the digital-first news format scored highest in terms of increasing their knowledge.



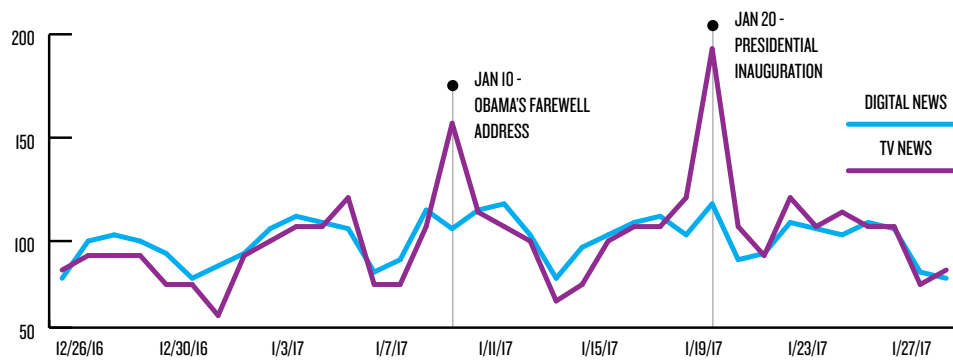
TV NEWS IS THE GO-TO SOURCE FOR BREAKING NEWS

While Millennials typically reach for digital first in their everyday lives, they, like many consumers, still tune in to live television for breaking news and special events. In looking at two specific events in January of 2017, we see huge spikes in the daily reach of total TV news among Millennials. Comparatively, consumption of total digital news did not follow suit.



MILLENNIALS STILL TUNE IN TO TV NEWS FOR BREAKING NEWS

Daily Reach % Index - January 2017

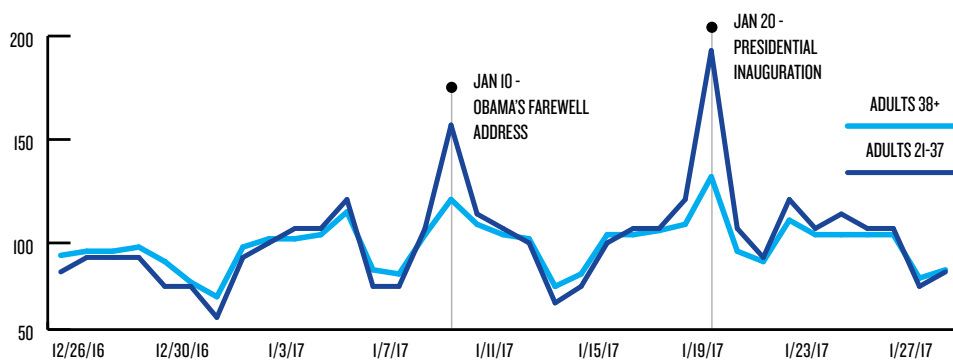


Source: Nielsen Media Impact, Dec. 26, 2016 – Jan. 29, 2017, daily reach % indexed to average daily reach for the month of January. TV news is defined as national broadcast and cable.

It's also worth noting that swings in TV news consumption among Millennials is more pronounced than among adults 38 and older.

MILLENNIAL VIEWING OF TV NEWS SPIKES DURING BREAKING NEWS

Daily TV News Reach % Index - January 2017

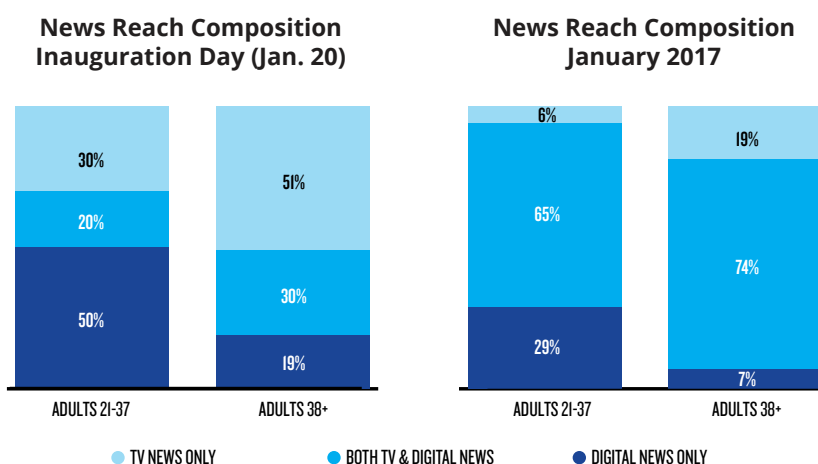


Source: Nielsen Media Impact, Dec. 26, 2016 – Jan. 29, 2017, daily reach % indexed to average daily reach for the month of January. TV news is defined as national broadcast and cable.

Despite the significant reach of national TV news among Millennials during breaking news, many young consumers opt to get insight into breaking news from digital means alone. And in looking across the breaking news that occurred in January 2017, Millennials are significantly more likely to rely solely on digital news than their older counterparts.

TV AND DIGITAL BREAKING NEWS CONSUMPTION IN JANUARY 2017

Millennials are more likely to solely rely on digital for breaking news



Source: Nielsen Media Impact, Total Media Fusion, January 2017. TV news is defined as national broadcast and cable.

As a digital generation, Millennials are much more likely than older generations to seek out their news online. This generation’s mobile lifestyle, which involves notably less media time than older consumers, means Millennials spend less time with news—and are less likely to give it their full attention.

Even with a mobile mindset, Millennials do supplement their digital news consumption with TV news, particularly when breaking news hits. And when breaking news and special events happen, TV news has a greater reach among younger consumers than consumers 38 and older. So while digital is a staple among this key group for marketers and content producers, it’s clear that total news consumption comprises a mix of media options rather than a single stream.



METHODOLOGY

The insights in this report were derived from the following sources:

- The Q1 2018 Nielsen Total Audience Report
- Total Media Fusion access via Nielsen Media Impact
- Nielsen Media Lab, Online Controlled Exposure Test, P18-64 (n=2,800), clip lengths vary between 10-12 mins, three programs for Broadcast News, 15 programs for Cable News, five programs for Digital First News and five programs for Late Night



DEFINITIONS

TV

- Includes all television programs on national broadcast and cable classified under three genres: News, Children's News, and Sports News
- Reach is defined as at least one minute of viewing, live +7 days
- Local TV news excluded from the analysis

DIGITAL

- “Digital” as defined by Nielsen Netview
- Reach is defined as at least one page impression
- Digital includes all websites and apps across desktop, mobile, and tablet under the following categories: News & Information, Special Interest News, Current Events & Global News, Multi-category News & Information, Finance/Insurance/Investment/Financial News & Information, Computers & Consumer Electronics/Computer & Consumer Electronics News
- Digital news excludes news activity on social media websites and apps
- Digital Content Ratings data included in digital measurement starting July 2016. For that reason, data before July 2016 was not included in the analysis
- TV on Digital includes digital properties for broadcast and cable news TV networks
- Digital First News includes the top 10 reaching news entities among P18+ during December 2017 and excludes TV on Digital properties

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.



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