AN ERA OF GROWTH

THE CROSS-PLATFORM REPORT

MARCH 2014

nielsen

AN UNCOMMON SENSE OF THE CONSUMER™

WELCOME

DOUNIA TURRILL
SVP INSIGHTS, NIELSEN

The more things change, the more they stay the same, or so the saying goes. How many, how often and how long have been at the core of the measurement and monetization paradigm for decades, and now we also are tracking how, where and on what device. Yet, for all that's changing in our media fragmented reality, viewers continue to demand and consume quality content for entertainment, information and connection at the rate of close to 60 hours per week.

The past month has been fascinating. Americans have flocked to the TV set, have engaged with content online and have shared their experiences around the content on social media at record levels. From the Super Bowl to the Olympics we've seen the draw of live and special event programming. But we've also seen popular dramas return to the screen with record numbers showing that scripted television does draw audiences.

LOOKING AT THE FACE OF TRADITIONAL TELEVISION, I CONTINUE TO APPLAUD ITS STABILITY AND RESILIENCE AS WELL AS ITS ABILITY TO BRIDGE THE GAP WITH DIGITAL AND SOCIAL MEDIA TO ENGAGE BEYOND THE CONFINES OF THE LIVING ROOM.

The Super Bowl showed us this year that it is about TV, and so much more than TV. It also showed the extension of media and media consumption across all linear and digital screens.

We've measured how people consume media for some 70 years and can tell you first-hand: content creators, agencies and CMOs are dealing with this fragmentation head-on. As they evolve, so does our ability to capture and measure the connection points that inform decisions on billions of advertising dollars. Broadcasters and publishers want to make guarantees

Copyright © 2014 The Nielsen Company

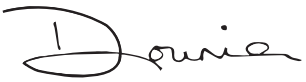
on which they can deliver, and the advertiser community wants to see a return on investment. Tying this all together is the consumers' ever present desire to be entertained, informed and engaged while looking to all the touchpoints for that content.

Each quarter we look to increase the scope and granularity of insights as we report on the American consumer's connection to content; video, audio and text, across linear, digital and mobile. We look not only to extend the breadth of measurement we report but also to ensure that as measurement evolves it becomes more precise.

This year will be another big year in audience measurement as we enable measurement of broadcast and digital video on mobile devices across both the linear and dynamic ad models. With this in mind, we have migrated the reporting of mobile use and mobile video use within this report from data taken from our mobile insights survey to metered data through Electronic Mobile Measurement. With this we see some trend breaks as we migrate to a more precise and consistent reporting of mobile consumption, one that is based on measured behavior.

AS WE CREATE THE TAPESTRY OF MEDIA CONSUMPTION WITH ITS IMPACT AND OPPORTUNITY FOR ADVERTISERS, IT STRIKES ME THAT WE ARE IN AN ERA OF TREMENDOUS GROWTH AND THE QUALITY OF INFORMATION IS MORE IMPORTANT THAN EVER.

Content in its many forms is a constant draw and the American consumer continues to show us that they want to be entertained and engaged. Media fragmentation drives us to continue to ensure that measurement meets the growing demands to follow that consumer from point of contact to point of purchase.



DOUNIA

PROFILES OF MULTIMEDIA MOBILE & VIDEO USERS

SMARTPHONE

50% FEMALE

50% MALE

SMARTPHONE VIDEO

49% FEMALE

51% MALE

ONLINE VIDEO

53% FEMALE

47% MALE

TELEVISION

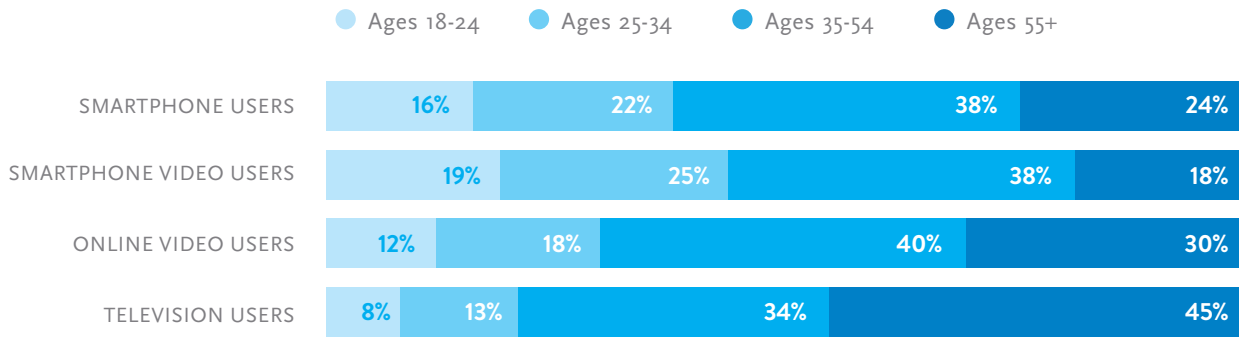
54% FEMALE

46% MALE

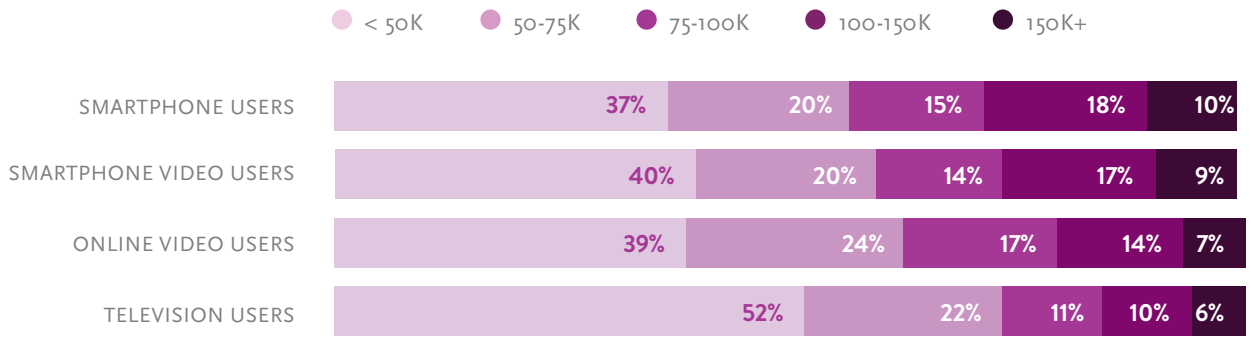
Copyright © 2014 The Nielsen Company

PROFILES OF MULTIMEDIA MOBILE & VIDEO USERS

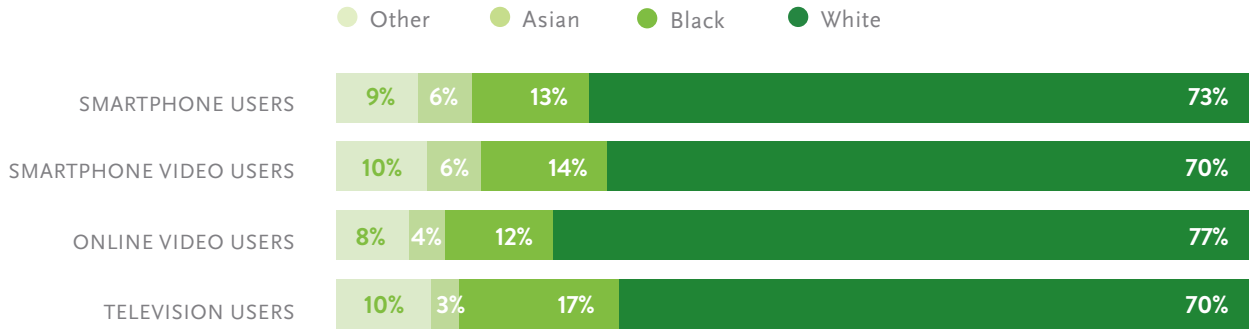
AGE PROFILE



HOUSEHOLD INCOME PROFILE

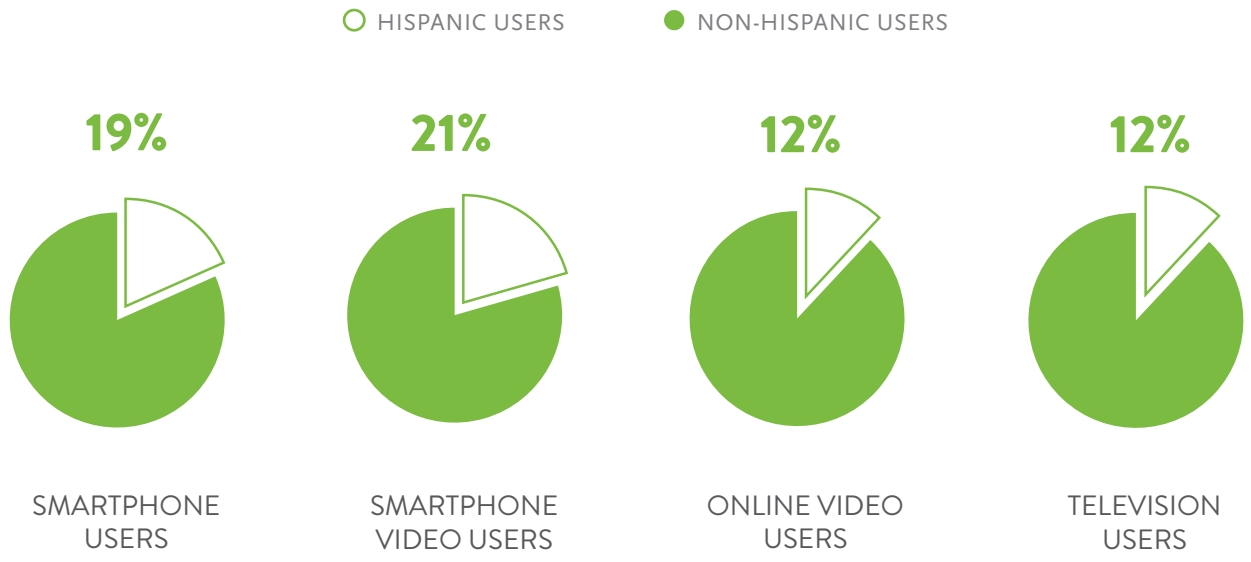


RACE PROFILE



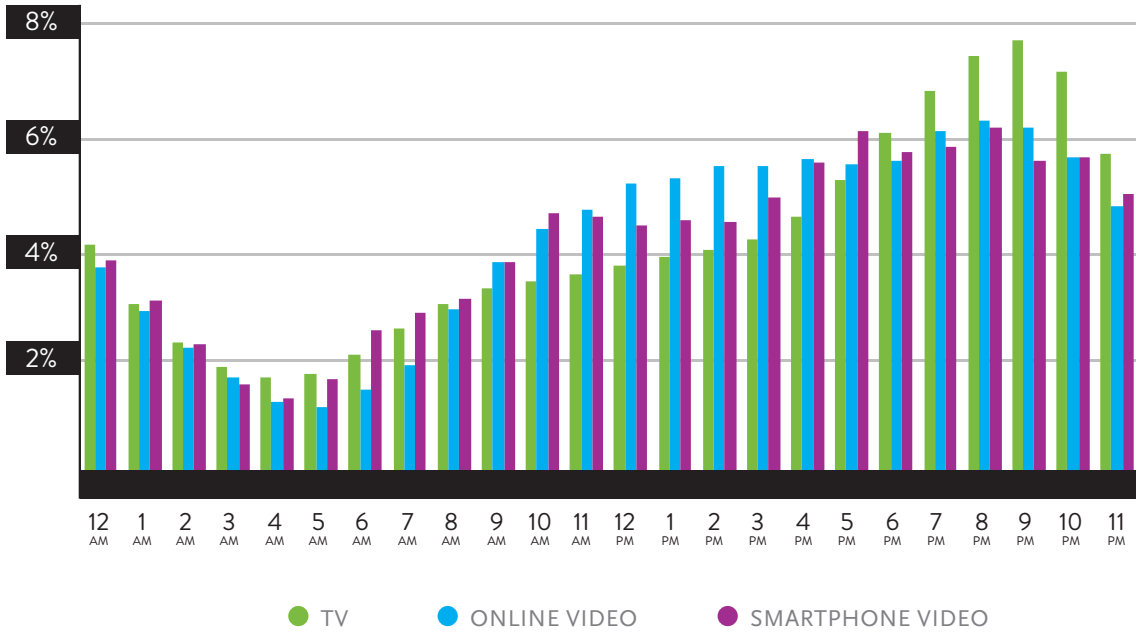
PROFILES OF MULTIMEDIA MOBILE & VIDEO USERS

ETHNICITY PROFILE



A DAY IN THE LIFE

% OF VIDEO TIME SPENT BY PLATFORM BY HOUR

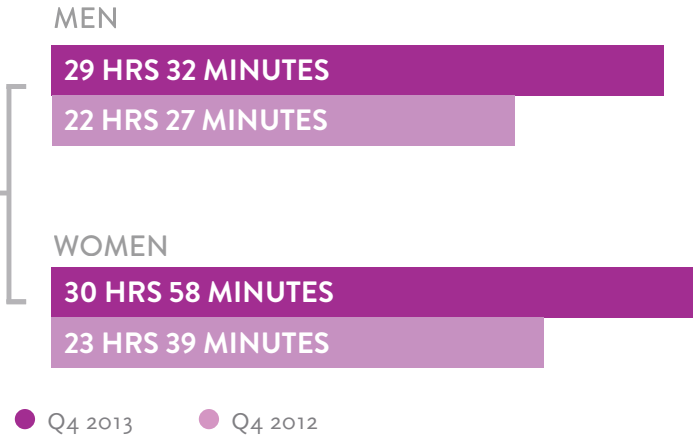


Copyright © 2014 The Nielsen Company

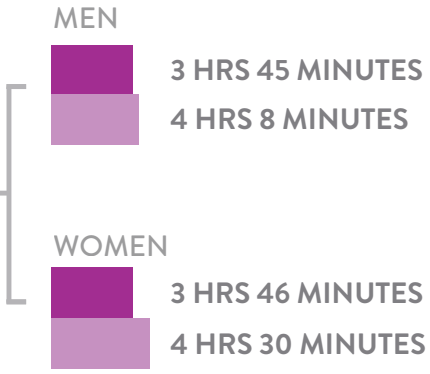
A CLOSER LOOK AT SMARTPHONE USERS

MONTHLY USAGE OF APP AND MOBILE WEB

89% OF THEIR TIME SPENT ON MEDIA IS THROUGH MOBILE APPS



11% OF THEIR TIME SPENT ON MEDIA IS THROUGH THE MOBILE WEB



A CLOSER LOOK AT TABLET USERS

MONTHLY USAGE OF APP AND MOBILE WEB

81% OF THEIR TIME SPENT ON MEDIA IS THROUGH MOBILE APPS

● Q4 2013

19% OF THEIR TIME SPENT ON MEDIA IS THROUGH THE MOBILE WEB

Copyright © 2014 The Nielsen Company

A CLOSER LOOK AT THE DATA

EXHIBIT 1 - AVERAGE TIME SPENT PER ADULT 18+ PER DAY

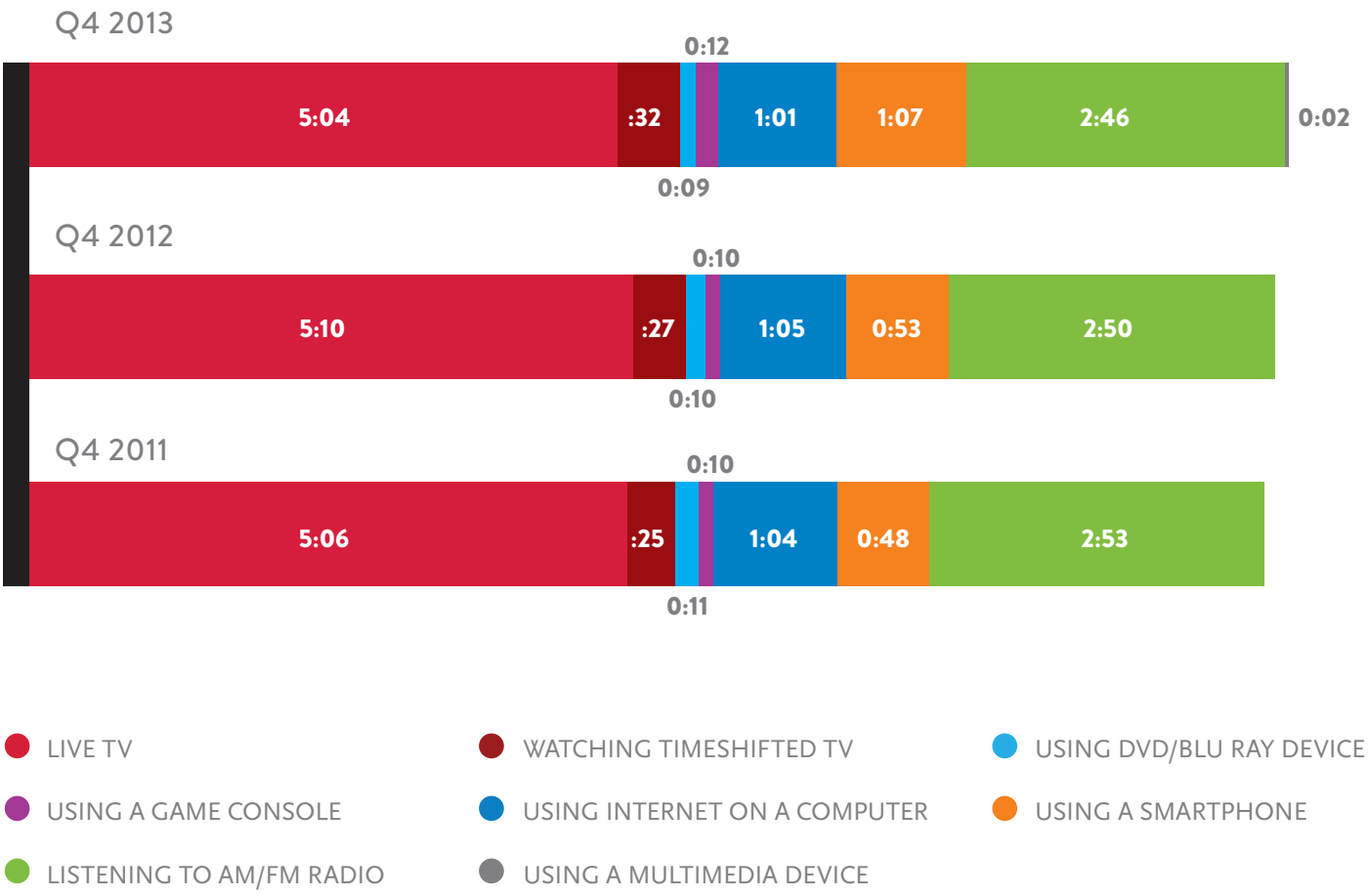


TABLE 1 – A WEEK IN THE LIFE; BASED OFF THE TOTAL US POPULATION

WEEKLY TIME SPENT IN HOURS : MINUTES –BY AGE DEMOGRAPHIC

	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+	A 18+	BLACK 2+	HISP. 2+	ASIAN 2+
On Traditional TV	24:16	20:41	22:27	27:36	33:40	43:56	50:34	33:53	36:56	47:25	27:14	18:52
Watching Timeshifted TV	2:21	1:51	1:48	3:34	3:57	4:01	3:10	3:12	3:29	2:30	2:04	2:10
Using a DVD/ Blu Ray Device	2:02	1:00	0:56	1:26	1:17	0:56	0:34	1:10	1:02	1:18	1:12	0:50
Using a Game Console	2:37	3:47	3:38	2:41	1:06	0:27	0:06	1:43	1:21	2:01	1:50	1:07
Using a Multimedia Device	0:18	0:13	0:16	0:24	0:20	0:09	0:09	0:16	0:16	0:08	0:10	0:50
Using the Internet on a Computer	0:20	0:43	4:26	5:45	6:14	5:22	3:04	4:06	5:07	3:51	2:33	3:18
Watching Video on Internet	0:11	0:19	1:32	1:31	1:07	0:47	0:18	0:50	1:00	1:01	0:48	1:00
Using any App/Web on a Smartphone	n/a	n/a	7:10	7:15	5:59	3:35	0:38	n/a	4:47	7:23	6:48	6:05
Watching Video on a Smartphone	n/a	n/a	0:19	0:13	0:08	0:04	-	n/a	0:08	0:16	0:16	0:13
Listening to AM/ FM Radio	n/a	7:46	10:49	12:04	14:21	15:09	12:16	12:47	13:19	13:15	12:58	n/a

Copyright © 2014 The Nielsen Company

TABLE 2 – OVERALL USAGE BY MEDIUM

NUMBER OF USERS 2+ (IN 000'S) – MONTHLY REACH

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012
On Traditional TV	286,705	283,930	37,412	36,981	48,416	47,276	15,313	15,868
Watching Timeshifted TV	174,039	159,685	21,438	19,376	23,209	21,028	8,278	7,905
Using a DVD/Blu Ray Device	145,175	152,831	16,665	18,188	23,778	24,492	7,084	7,778
Using a Game Console	97,667	97,130	12,394	12,677	18,727	17,290	5,248	5,801
Using a Multimedia Device	16,861	n/a	932	n/a	2,024	n/a	2,194	n/a
Using the Internet on a Computer	204,360	212,359	24,566	25,182	27,470	28,084	7,457	7,541
Watching Video on Internet	152,421	162,213	18,092	19,110	20,269	21,796	5,855	6,092
Using any App/Web on a Smartphone	144,320	110,916	18,273	14,494	26,766	20,709	8,527	6,593
Watching Video on a Smartphone	101,652	80,740	14,441	11,416	20,962	16,760	6,438	4,743

TABLE 3 – MONTHLY TIME SPENT BY MEDIUM

USERS 2+ IN HOURS: MINUTES

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012
On Traditional TV	155:32	156:24	218:01	215:02	123:25	131:08	92:13	99:30
Watching Timeshifted TV	14:40	12:38	11:31	9:45	9:20	8:21	10:37	9:06
Using a DVD/Blu Ray Device	5:21	5:39	6:00	6:12	5:27	5:41	4:04	4:33
Using a Game Console	7:54	6:35	9:14	8:17	8:20	7:22	5:27	4:56
Using a Multimedia Device	1:12	n/a	0:35	n/a	0:46	n/a	4:03	n/a
Using the Internet on a Computer	27:44	29:23	28:13	31:33	21:20	26:01	34:35	38:19
Watching Video on Internet	7:34	5:54	10:09	8:15	9:03	7:20	13:30	10:59
Using any App/Web on a Smartphone	34:03	27:22	42:32	32:36	37:19	33:11	33:53	24:13
Watching Video on a Smartphone	1:23	1:00	2:01	1:20	1:54	1:30	1:39	1:17

TABLE 4 – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES
AMONG COMPOSITE

	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+
On Traditional TV	111:10	93:53	113:14	130:57	152:51	195:56	225:18	155:32
Watching Timeshifted TV	10:45	8:26	9:03	16:55	17:58	17:54	14:09	14:40
Using a DVD/Blu Ray Device	9:18	4:33	4:42	6:46	5:48	4:09	2:30	5:21
Using a Game Console	11:58	17:12	18:19	12:45	5:02	2:00	0:27	7:54
Using a Multimedia Device	1:21	0:59	1:21	1:55	1:33	0:42	0:41	1:12
Using the Internet on a Computer	4:19	6:44	29:24	33:09	33:17	31:35	24:18	27:44
Watching Video on Internet	3:40	4:31	13:14	11:20	7:50	6:08	3:14	7:34
Using any App/Web on a Smartphone	n/a	n/a	41:05	40:37	35:03	25:52	18:51	34:03
Watching Video on a Smartphone	n/a	n/a	2:15	1:34	1:07	0:56	0:40	1:23

TABLE 4 – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES
AMONG AFRICAN AMERICANS

	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+
On Traditional TV	156:22	147:16	169:05	188:20	222:04	293:59	327:07	218:01
Watching Timeshifted TV	8:12	7:53	7:54	14:03	14:52	14:27	8:38	11:31
Using a DVD/Blu Ray Device	8:22	2:59	4:24	7:26	7:01	6:00	3:03	6:00
Using a Game Console	11:48	17:33	18:42	15:06	4:54	2:13	0:51	9:14
Using a Multimedia Device	0:27	0:12	0:18	0:57	1:13	0:19	0:07	0:35
Using the Internet on a Computer	4:43	7:51	32:49	33:47	35:20	29:25	19:18	28:13
Watching Video on Internet	4:03	4:50	18:21	15:22	9:13	7:34	4:40	10:09
Using any App/Web on a Smartphone	n/a	n/a	50:43	49:42	39:40	35:50	31:19	42:32
Watching Video on a Smartphone	n/a	n/a	3:00	2:36	1:37	1:16	0:56	2:01

Copyright © 2014 The Nielsen Company

TABLE 4 – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES
AMONG HISPANICS

	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+
On Traditional TV	105:38	83:11	99:28	112:38	128:59	160:23	216:13	123:25
Watching Timeshifted TV	8:58	6:13	6:47	10:13	11:23	10:03	9:35	9:20
Using a DVD/Blu Ray Device	9:08	4:47	4:14	5:40	5:03	3:50	2:04	5:27
Using a Game Console	10:54	15:35	16:05	10:03	3:22	1:44	0:31	8:20
Using a Multimedia Device	0:55	0:51	0:39	0:45	0:58	0:28	0:30	0:46
Using the Internet on a Computer	4:07	7:31	28:10	25:23	24:51	25:41	18:07	21:20
Watching Video on Internet	4:34	4:56	15:01	11:06	7:24	9:27	4:34	9:03
Using any App/Web on a Smartphone	n/a	n/a	36:54	40:46	39:11	29:14	20:04	37:19
Watching Video on a Smartphone	n/a	n/a	2:51	1:52	1:22	0:56	4:08	1:54

TABLE 4 – MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES
AMONG ASIAN AMERICANS

	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+
On Traditional TV	65:12	58:35	63:57	87:52	83:07	110:28	166:20	92:13
Watching Timeshifted TV	8:27	7:43	6:49	12:32	11:38	12:40	9:58	10:37
Using a DVD/Blu Ray Device	7:06	2:33	2:01	4:20	4:30	3:19	2:52	4:04
Using a Game Console	8:17	9:19	12:07	7:26	4:03	1:39	0:41	5:27
Using a Multimedia Device	2:52	2:10	3:31	7:02	3:48	3:54	3:56	4:03
Using the Internet on a Computer	4:14	8:48	53:25	39:28	41:43	25:11	19:47	34:35
Watching Video on Internet	4:45	5:59	21:20	19:08	11:58	8:17	5:34	13:30
Using any App/Web on a Smartphone	n/a	n/a	33:17	37:29	39:10	-	-	33:53
Watching Video on a Smartphone	n/a	n/a	1:53	1:34	1:11	-	-	1:39

TABLE 5 – CROSS-PLATFORM HOMES RANKED BY IN-HOME STREAMING BEHAVIOR

	COMPOSITE				AFRICAN AMERICAN			
STREAMING QUINTILE	# OF PERSONS (000)	STREAM	INTERNET	TV	# OF PERSONS (000)	STREAM	INTERNET	TV
		(AVERAGE DAILY MINUTES)				(AVERAGE DAILY MINUTES)		
Stream 1	25,986	22.0	54.9	241.6	2,586	27.0	50.7	326.5
Stream 2	26,003	2.6	36.7	285.4	2,550	3.3	31.1	414.6
Stream 3	25,978	0.8	21.1	277.0	2,570	1.0	17.3	367.1
Stream 4	25,984	0.2	14.4	288.0	2,568	0.3	12.3	373.6
Stream 5	25,999	0.0	8.8	280.2	2,568	0.0	10.8	380.3
Non Streamers	113,308	0.0	1.4	255.2	12,651	0.0	1.3	352.3
All	243,257	2.8	15.2	265.5	25,493	3.2	13.0	362.3

	HISPANIC				ASIAN AMERICAN			
STREAMING QUINTILE	# OF PERSONS (000)	STREAM	INTERNET	TV	# OF PERSONS (000)	STREAM	INTERNET	TV
		(AVERAGE DAILY MINUTES)				(AVERAGE DAILY MINUTES)		
Stream 1	3,535	24.5	44.7	184.5	1,535	35.4	58.5	121.3
Stream 2	3,534	3.9	23.1	216.0	1,543	4.5	33.4	158.8
Stream 3	3,535	1.2	14.0	225.0	1,536	1.1	15.3	169.6
Stream 4	3,538	0.4	8.4	230.7	1,534	0.3	13.5	151.3
Stream 5	3,534	0.1	6.2	211.7	1,538	0.0	8.8	170.6
Non Streamers	18,465	0.0	0.7	203.8	7,596	0.0	2.0	169.8
All	36,140	3.0	9.8	208.6	15,283	4.2	14.1	161.9

Copyright © 2014 The Nielsen Company

TABLE 5 – CROSS-PLATFORM HOMES RANKED BY IN-HOME INTERNET BEHAVIOR

	COMPOSITE				AFRICAN AMERICAN			
INTERNET QUINTILE	# OF PERSONS (000)	STREAM	INTERNET	TV	# OF PERSONS (000)	STREAM	INTERNET	TV
		(AVERAGE DAILY MINUTES)				(AVERAGE DAILY MINUTES)		
Internet 1	35,210	11.5	75.6	328.4	3,470	15.7	67.6	440.9
Internet 2	35,197	4.9	19.5	270.1	3,466	5.3	18.2	369.3
Internet 3	35,184	1.7	6.8	262.0	3,475	1.8	6.7	363.8
Internet 4	35,205	0.6	1.9	251.8	3,466	0.6	2.0	329.2
Internet 5	35,203	0.1	0.3	251.3	3,468	0.1	0.3	330.7
Non Internet Users	67,258	0.0	0.0	245.9	8,149	0.0	0.0	352.3
All	243,257	2.8	15.2	265.5	25,493	3.2	13.0	362.3

	HISPANIC				ASIAN AMERICAN			
INTERNET QUINTILE	# OF PERSONS (000)	STREAM	INTERNET	TV	# OF PERSONS (000)	STREAM	INTERNET	TV
		(AVERAGE DAILY MINUTES)				(AVERAGE DAILY MINUTES)		
Internet 1	4,821	14.8	54.6	245.9	2,051	19.3	75.9	156.0
Internet 2	4,808	5.0	12.9	210.7	2,026	8.6	20.6	161.7
Internet 3	4,809	1.6	4.3	202.2	2,058	2.3	6.4	172.2
Internet 4	4,831	0.5	1.2	210.4	2,039	0.9	1.7	166.6
Internet 5	4,815	0.1	0.2	200.4	2,048	0.2	0.2	160.2
Non Internet Users	12,056	0.0	0.0	197.8	5,060	0.0	0.0	159.0
All	36,140	3.0	9.8	208.6	15,283	4.2	14.1	161.9

TABLE 5 – CROSS-PLATFORM HOMES RANKED BY IN-HOME TELEVISION VIEWING BEHAVIOR

	COMPOSITE				AFRICAN AMERICAN			
TELEVISION QUINTILE	# OF PERSONS (000)	STREAM	INTERNET	TV	# OF PERSONS (000)	STREAM	INTERNET	TV
		(AVERAGE DAILY MINUTES)				(AVERAGE DAILY MINUTES)		
Television 1	48,261	2.4	22.9	640.8	5,058	3.1	18.6	826.0
Television 2	48,278	2.2	17.0	330.5	5,052	2.5	12.9	468.5
Television 3	48,278	2.0	13.0	208.5	5,065	3.2	12.8	288.2
Television 4	48,262	2.8	11.8	118.1	5,057	3.2	10.3	176.0
Television 5	48,270	4.3	11.4	32.3	5,061	4.0	10.7	56.0
Non Television Viewers	1,907	5.7	10.9	0.0	201	4.8	6.0	0.0
All	243,257	2.8	15.2	265.5	25,493	3.2	13.0	362.3

	HISPANIC				ASIAN AMERICAN			
TELEVISION QUINTILE	# OF PERSONS (000)	STREAM	INTERNET	TV	# OF PERSONS (000)	STREAM	INTERNET	TV
		(AVERAGE DAILY MINUTES)				(AVERAGE DAILY MINUTES)		
Television 1	7,156	2.7	16.1	493.6	3,001	2.6	16.3	459.1
Television 2	7,184	2.7	8.9	257.1	3,013	2.1	11.8	199.6
Television 3	7,175	2.2	7.8	169.6	2,994	5.1	16.7	106.0
Television 4	7,171	2.5	7.2	98.5	3,001	5.0	13.5	49.2
Television 5	7,169	4.5	9.3	28.0	3,002	6.0	12.8	9.7
Non Television Viewers	287	3.2	2.9	0.0	272	7.0	10.4	0.0
All	36,140	3.0	9.8	208.6	15,283	4.2	14.1	161.9

Copyright © 2014 The Nielsen Company

TABLE 6 – SMARTPHONE VIDEO VIEWING QUARTILE

BASED ON ADULTS 18+ USAGE OF VIDEO ON APPS/WEB

	Q4 2013		Q4 2012	
SMARTPHONE QUARTILE	# OF PERSONS (000)	TPP (HH:MM:SS)	# OF PERSONS (000)	TPP (HH:MM:SS)
Smartphone 1	25,074	4:46:54	20,181	3:27:15
Smartphone 2	24,300	0:39:31	19,324	0:27:26
Smartphone 3	25,437	0:11:30	21,111	0:07:19
Smartphone 4	26,841	0:01:46	20,124	0:00:56
All	101,652	1:23:34	80,740	1:00:31

TABLE 7 - TELEVISION DISTRIBUTION SOURCES

NUMBER OF HOUSEHOLDS (IN 000'S)

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012
Broadcast Only	11,310	11,277	1,958	1,882	2,727	2,631	682	565
Wired Cable (No Telco)	55,692	57,805	7,702	7,734	6,027	6,512	2,151	2,107
Telco	11,975	9,882	1,581	1,223	1,375	1,061	643	557
Satellite	35,110	34,677	3,533	3,795	5,433	5,245	856	998
Broadband Only	1,289	n/a	102	n/a	113	n/a	107	n/a

TABLE 8 – CABLE/SATELLITE HOMES WITH INTERNET STATUS

NUMBER OF HOUSEHOLDS (IN 000'S)

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012
Broadcast Only and Broadband Access	5,604	5,121	553	463	857	829	474	455
Broadcast Only and No Internet/ Narrowband Access	6,311	6,291	1,338	1,338	1,753	1,660	177	102
Cable Plus and Broadband Access	79,914	78,071	8,212	8,054	8,874	8,442	3,459	3,320
Cable Plus and No Internet/ Narrowband Access	21,177	22,115	4,280	4,418	3,593	3,861	242	231

TABLE 9 – DEVICES IN TV HOUSEHOLDS

NUMBER OF HOUSEHOLDS (IN 000'S)

	COMPOSITE		AFRICAN AMERICAN		HISPANIC		ASIAN AMERICAN	
	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012	Q4 2013	Q4 2012
Any DVD/Blu Ray Player	94,980	95,173	11,388	11,556	12,185	12,403	3,274	3,358
Any DVR	54,523	50,687	5,688	5,313	5,709	5,353	1,908	1,838
Any High Definition TV	97,666	89,290	11,571	10,625	13,275	12,162	4,052	3,779
Any Video Game Console	51,290	50,607	6,436	6,199	8,049	7,726	2,285	2,229
Any Tablet	33,462	19,737	3,254	1,846	3,864	1,872	1,997	1,364

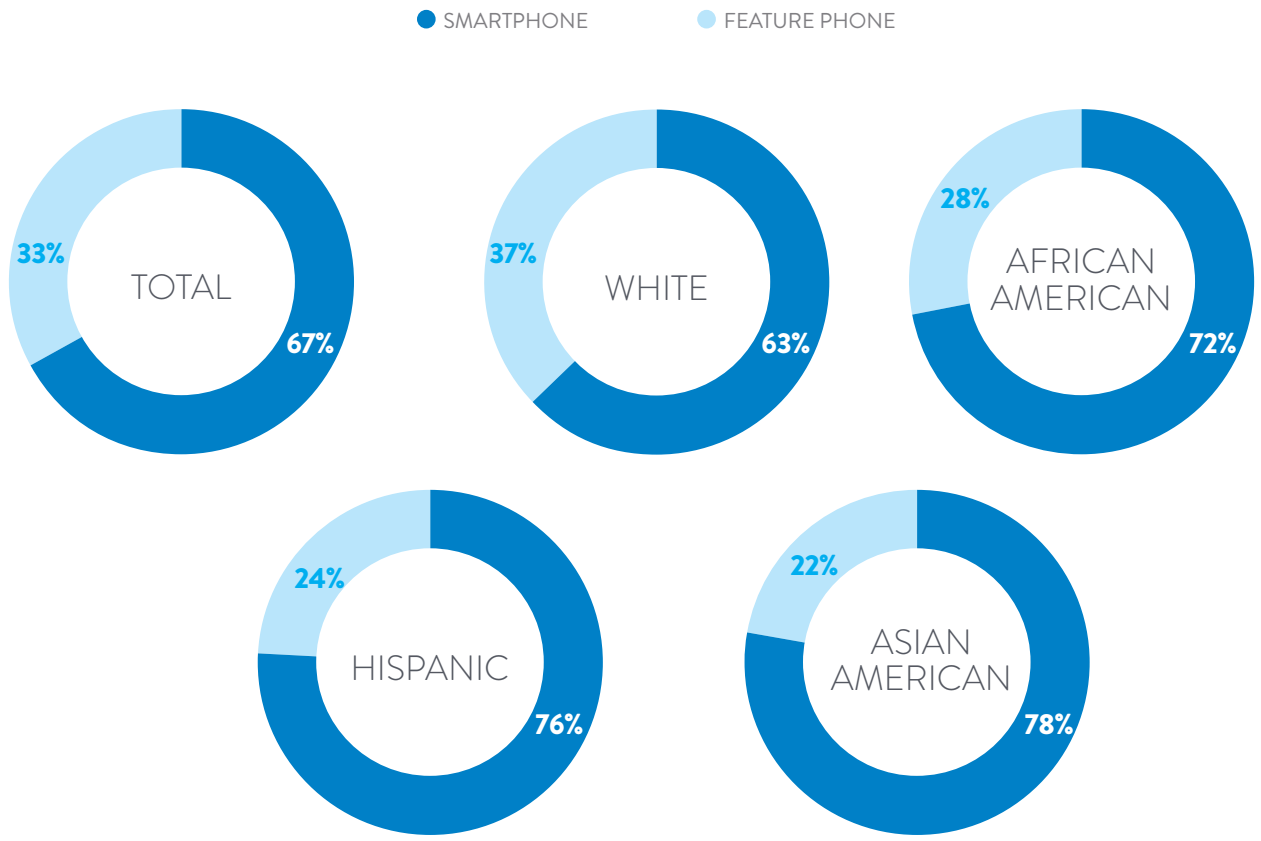
Copyright © 2014 The Nielsen Company

TABLE 10 - TELEVISION DISTRIBUTION SOURCES

PERCENTAGE OF HOUSEHOLDS

MARKET BREAK	COMPOSITE	WHITE	AFRICAN AMERICAN	HISPANIC	ASIAN AMERICAN
Broadcast Only	10%	9%	12%	16%	15%
Wired Cable (No Telco)	48%	48%	52%	39%	48%
Telco	11%	11%	11%	9%	15%
Satellite	30%	31%	24%	35%	19%
Broadband Only	1%	1%	1%	1%	3%

EXHIBIT 2 – MOBILE DEVICE PENETRATION BY ETHNICITY



SOURCING & METHODOLOGIES

GLOSSARY

TV HOUSEHOLD: Nielsen defines a TV household as a home with at least one operable TV/monitor with the ability to deliver video via traditional means of antennae, cable STB or Satellite receiver and /or with a broadband connection.

TRADITIONAL TV: Watching live or timeshifted content on a television set.

WIRED CABLE: Traditional cable delivered through wires to your home.

TELCO: A paid TV subscription delivered fiber-optically via a traditional telephony provider.

SATELLITE: A paid TV subscription where the signal is distributed to an orbiting satellite. The amplified signal is then re-transmitted to the home and received via a dish. (Sometimes also referred to as "dish").

BROADBAND ACCESS: A paid, high-speed Internet access delivered via DSL, Cable Internet through cable provider, Fiber-Optic Service, U-Verse, Satellite Internet, Data Card (aircard that connects to a cellular phone network) or PC tethered to cell phone (cellular phone network).

NARROWBAND ACCESS: A household that accesses the Internet via a telephone line (often referred to as dial up).

BROADCAST ONLY: A mode of television content delivery that does not involve satellite transmission or cables (ie—a paid service). Also commonly referred to as "Over-the-air."

BROADBAND ONLY: A household that receives video exclusively through a broadband internet connection via an operable TV/monitor instead of traditional means (over the air, wired cable, telco, satellite)

AM/FM RADIO: Listening to programming from AM/FM radio stations or network programming.

MULTIMEDIA DEVICE: Viewing on an internet connected device, such as an Apple TV, Boxee, Roku, or Google Chromecast, through the television. This does not include DVD / Blu Ray Devices, Game Consoles, or Computers.

TELEVISION METHODOLOGY

On Traditional TV includes Live usage plus any playback viewing within the measurement period. Timeshifted TV is playback primarily on a DVR but includes playback from VOD, DVD recorders, server based DVR's and services like Start Over.

On Traditional TV reach includes those viewing at least one minute within the measurement period. This includes Live viewing plus any playback within the measurement

Copyright © 2014 The Nielsen Company

period. Fourth Quarter 2013 Television data is based on the following measurement interval: 09/30/13-12/29/13. As of February 2011, DVR Playback has been incorporated into thePersons Using Television (PUT) Statistic.

Metrics for Using a DVD/Blu Ray Device and Using a Game Console are based on when these devices are in use for any purpose, not just for accessing media content. For example, Using a Game Console will also include time when the game console is being used to play video games.

ONLINE METHODOLOGY

In July 2011 an improved hybrid methodology was introduced in Nielsen's NetView and VideoCensus product. This methodology combines a census level accounting of page views and video streams where Nielsen measurement tags have been deployed in order to project audience and behavior to the full universe of all Internet users. For VideoCensus, the portion of the total video streams calibrated by census data, previously allocated to Home/Work computers, are now allocated to other devices and locations such as smartphones and viewing outside of home and work. This change affects both "Watching Video on the Internet" and "Using the Internet" figures. Beginning in Q1 2012, Cross-Platform metrics are derived from the new hybrid panel. Year over year trends are available beginning in Q3 2012. Data should not be trended to previous quarters' published editions.

Hours:minutes for Internet and video use are based on the universe of persons who used the Internet/watched online video. All Internet figures are weekly or monthly averages over the course of the quarter. All "Using the Internet on a Computer" metrics are derived from Nielsen NetView product, while all "Watching Video on the Internet" metrics are derived from Nielsen VideoCensus product. Watching video on the Internet is a subset of Using the Internet on a computer.

Due to a processing error, YouTube brand-level stream and duration metrics were inflated from May 2012 – May 2013 which impacted "Watching Video on Internet". The current report contains the corrected metrics for the prior year data in the year over year comparisons.

As of December 2013, secure or "https" streaming of videos will now be recognized, credited, and reported into applicable reporting entities such as Facebook which will result in an increase in "Watching Video on the Internet".

RADIO METHODOLOGY

AM/FM RADIO METHODOLOGY: Audience estimates for 48 large markets are based on a panel of people who carry a portable device called PPM that passively detects exposure to content that contains inaudible codes embedded within the program content. Audience estimates from the balance of markets and counties in the US are based on surveys of people who record their listening in a written diary for a week.

The estimates in this report are based on RADAR and the National Regional Database. RADAR reports national network radio ratings covering the US using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents aged 12+ per year. The National Regional Database reports national and regional radio ratings for individual radio stations using both PPM and Diary measurement. It is published twice a year and the annual sample is more than 600,000 respondents aged 12+.

NOTES: Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements.

MOBILE METHODOLOGY

Nielsen's Electronic Mobile Measurement (EMM) is an observational, user-centric approach that uses passive metering technology on smartphones to track device and application usage on an opt-in convenience panel. Results are then reported out through Nielsen Mobile NetView 3.0. There are approximately 5,000 panelists in the US across both iOS and Android smartphone devices, and this method provides a holistic view of all activity on a smartphone as the behavior is being tracked without interruption.

A number of steps are taken after the data collection process to ensure the reported data is representative of the mobile population. Weighting controls are applied across five characteristics (gender, age, income, race, and ethnicity) while independent enumeration studies are carried out on a continuous basis to provide the most current estimates of the mobile population (aka Universe Estimation). This mobile population is drawn from a combination of Mobile Insights, as well as surveying the National People Meter (NPM) panel that is the industry standard and currency for TV Ratings.

Figures reported in Nielsen's Mobile NetView 3.0 include those individuals who are P18+ who have used an iOS or Android smartphone device in the US during Q4 of 2013. In particular:
"Using any App/Web on Smartphone" refers to consuming mobile media content through a web browser or via a mobile app. It does not include other types of activity such as making/receiving phone calls, sending SMS/MMS messages etc, which has been excluded for this report.
"Watching Video on a Smartphone" is a subset of "Using an App/Web on Smartphone" and refers to those individuals who visit a website or use a mobile app specifically designed to watch video content.

Due to this methodology change from survey based data to EMM, data should not be trended to previous quarters' published editions. The current report contains the revised metrics for the prior year data in the year over year comparisons.

SOURCING

TABLES 1, 2, 3, 4 - A WEEK IN THE LIFE, OVERALL USAGE BY MEDIUM, MONTHLY TIME SPENT BY MEDIUM IN HOURS:MINUTES USERS 2+, MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES

Source: Traditional TV, Timeshifted TV, DVD, Game Consoles, Multimedia Devices 09/30/13-12/29/13 viaNielsen NPOWER/NPM Panel, Online 10/01/13-12/31/13 via Nielsen Netview andNielsen VideoCensus, Mobile 10/01/13-12/31/13 via Nielsen Electronic Mobile Measurement, Radio 09/19/12-09/11/13 via RADAR 118.

Table 1 is based on the total US population whether or not they have the technology. Tables 2-4 are based on users of each medium.

Electronic Mobile Measurement is based on P18+. Radio RADAR 118 data is based on P12+. Therefore, P2+ would be based on P18+ for Smartphone and P12+ for Radio.

Copyright © 2014 The Nielsen Company

TABLE 5 – CROSS-PLATFORM HOMES RANKED BY IN-HOME BEHAVIOR

Source: 10/01/13-12/31/13 via Nielsen NPOWER/Cross-Platform Homes Panel for P2+. Internet and Streaming based on home PC only.

TABLE 6 – SMARTPHONE VIDEO VIEWING QUARTILE

Source: 10/01/13-12/31/13 via Electronic Mobile Measurement for P18+. Smartphone video viewing quartiles are grouped based on users' time per person per month watching video on a Smartphone. The four tiers represent Bottom 25%, Mid-Bottom 25%, Mid-Top 25% and Top 25% of users in terms of time spent. "Watching Video on a Smartphone" is a subset of "Using any App/Web on Smartphone and refers to those individuals who visit a website or use a mobile app specifically designed to watch video content.

TABLE 7, 8, 9–TELEVISION DISTRIBUTION SOURCES, CABLE/SATELLITE HOMES WITH INTERNET STATUS, DEVICES IN TV HOUSEHOLDS

Source: Based on the Universe Estimates for the 15th of each month within the quarter via Nielsen NPOWER/NPM Panel.

TABLE 10 - TELEVISION DISTRIBUTION SOURCES - PERCENTAGE OF HOUSEHOLDS

Source: Based on the scaled installed counts for 09/30/13-12/29/13 via Nielsen NPOWER/NPM Panel.

EXHIBIT 1 – AVERAGE TIME SPENT PER ADULT 18+ PER DAY

Source: Live TV, Timeshifted TV, DVD, Game Consoles, Multimedia Devices 09/30/13 - 12/29/13 via Nielsen NPOWER/NPM Panel, Online 10/01/13-12/31/13 via Nielsen Netview, Mobile 10/01/13-12/31/13 via Electronic Mobile Measurement, Radio 09/19/12-09/11/13 via RADAR 118

Exhibit 1 is based on users of each medium.

EXHIBIT 2 – MOBILE DEVICE PENETRATION BY ETHNICITY

Source: Mobile 10/01/13-12/31/13 via Nielsen Mobile Insights.

Note: - represents insufficient sample size while n/a represents data unavailability.

PAGES 4-8

Profiles of Multimedia Mobile & Video Users
TV via Nielsen NPOWER/NPM Panel, Online via Nielsen VideoCensus, Mobile via Electronic Mobile Measurement, December 2013, P18+

A Day in the Life
TV via Nielsen NPOWER/NPM Panel, Online via Nielsen VideoCensus, Mobile via Electronic Mobile Measurement, December 2013, P18+

A Closer Look at Smartphone Users
Mobile via Electronic Mobile Measurement, Qtr 4 2013 & 2012, P18+

A Closer Look at Tablet Users
iPad via Electronic Mobile Measurement, Qtr 4 2013, P18+. Data is unweighted.

Nielsen's iPad panel launched in January 2013.

ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

For more information, visit www.nielsen.com.

Copyright © 2014 The Nielsen Company. All rights reserved. Nielsen and the Nielsen logo are trademarks or registered trademarks of CZT/ACN Trademarks, L.L.C. Other product and service names are trademarks or registered trademarks of their respective companies.
13/7429

nielsen AN UNCOMMON SENSE OF THE CONSUMER™

nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™